Luxembourg for Tourism

Market profile NETHERLANDS 2024

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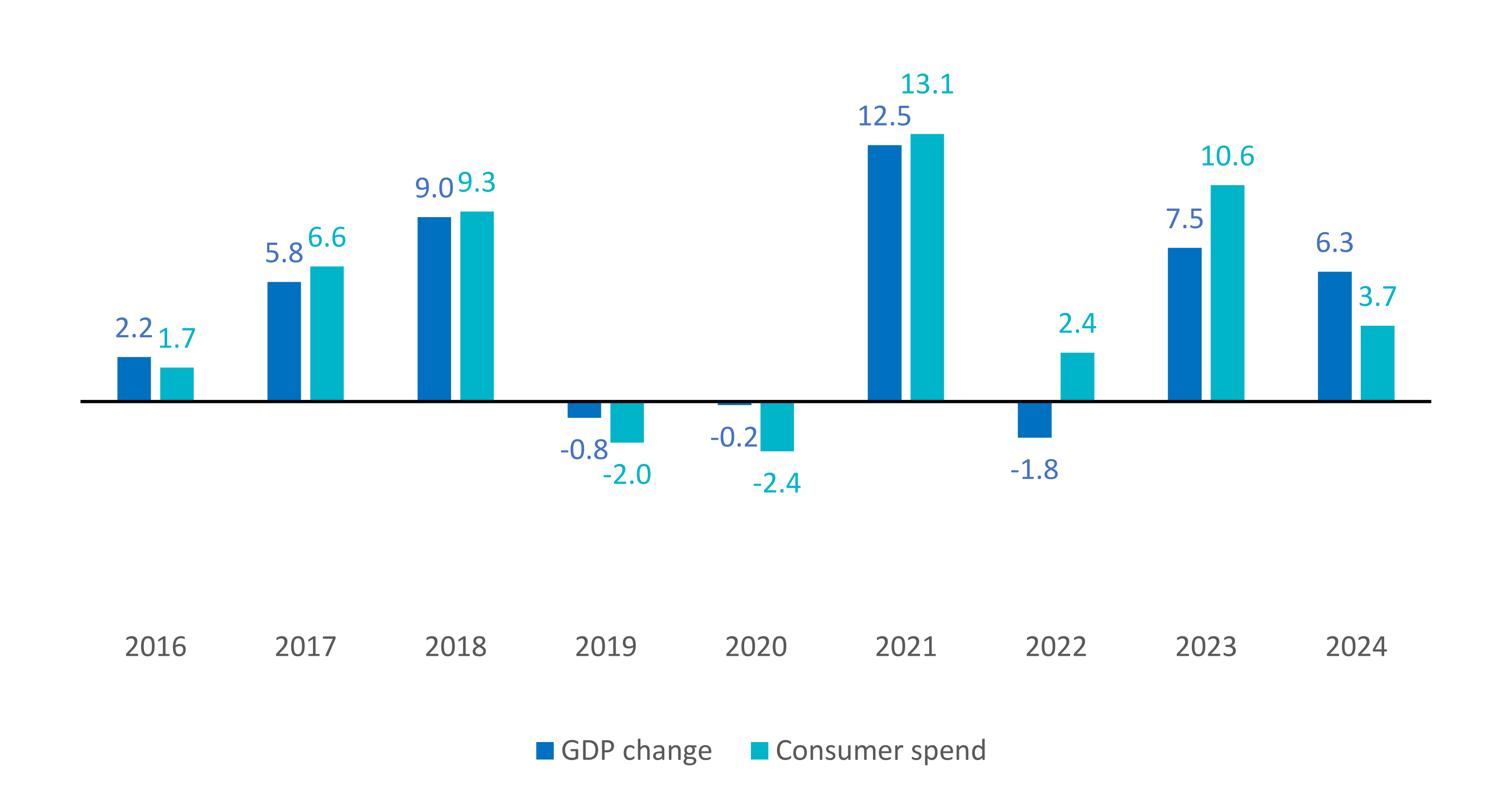
Economic indicators & General Travel Demand

Economic indicators – General travel demand

GDP and consumer spending, % annual change



Economy & population

GDP ($) per capita
67,473.13

Unemployment (%)
3.66

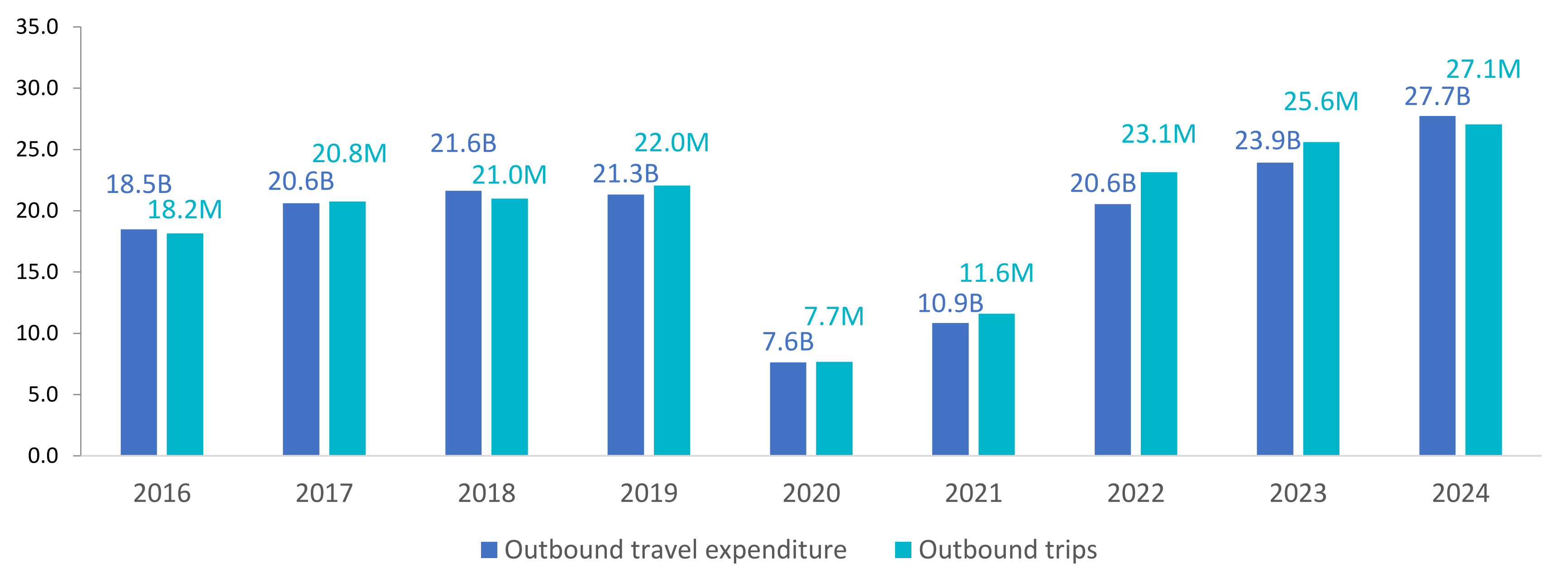
Inflation(%)
3.35

Population
18,003,570

Sources: Oxford Economics.

Economic indicators – General travel demand

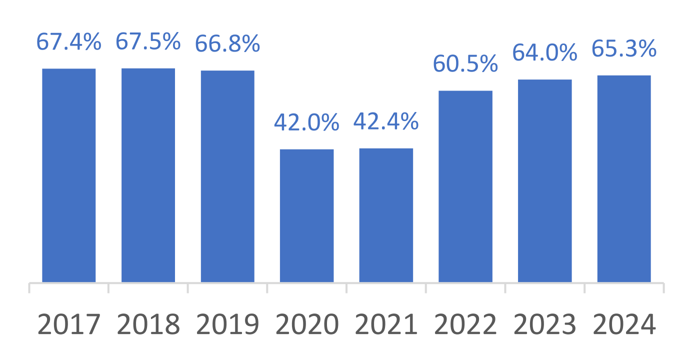
Outbound trips and travel expenditure



Outbound travel intensity
1.50 trips
per inhabitant (2024)

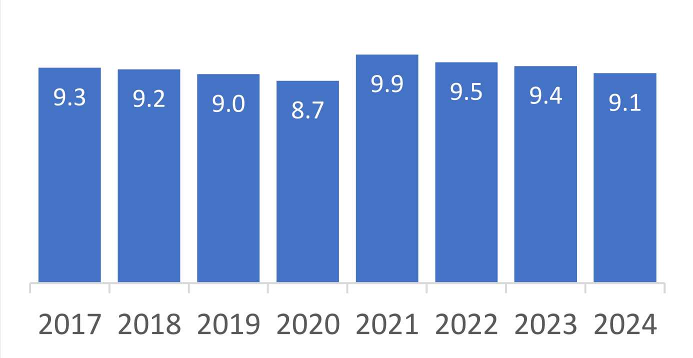
Average spend
per outbound trip (2024)
1,025 $

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2024)
83.8%

Average length of stay, nights, all outbound trips



Share of short trips
(1-3 nights),
% all outbound
trips (2024)
26.6%

Sources: Eurostat, Oxford Economics.

Arrivals & nights in paid accommodation

Nights in paid accommodation

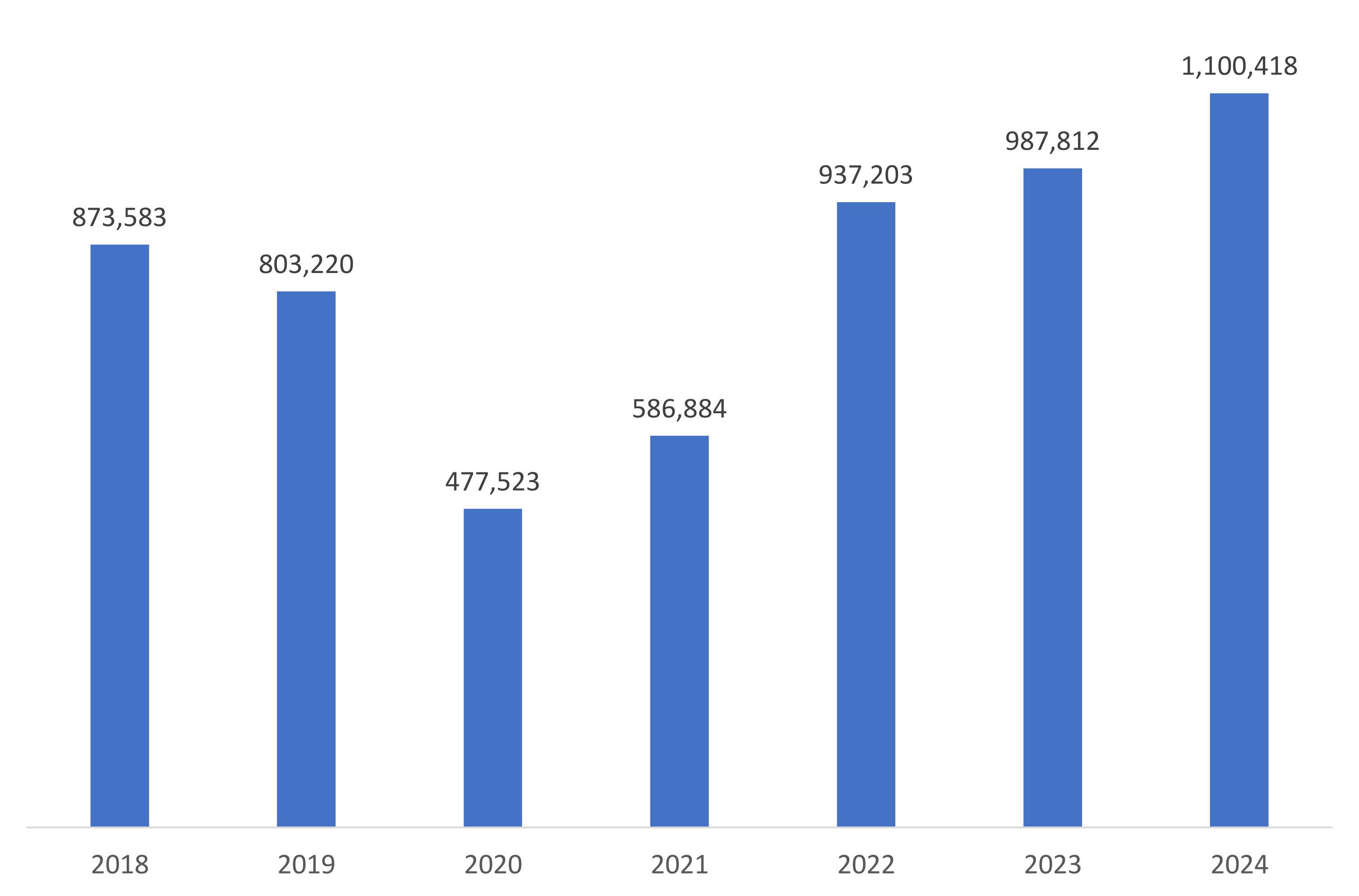
2024 and 2018-2024

Nights, paid accommodation, 2024

1.100.418

+11% (vs. 2023)

+37% (vs. 2019)



Source: Statec

Arrivals in paid accommodation

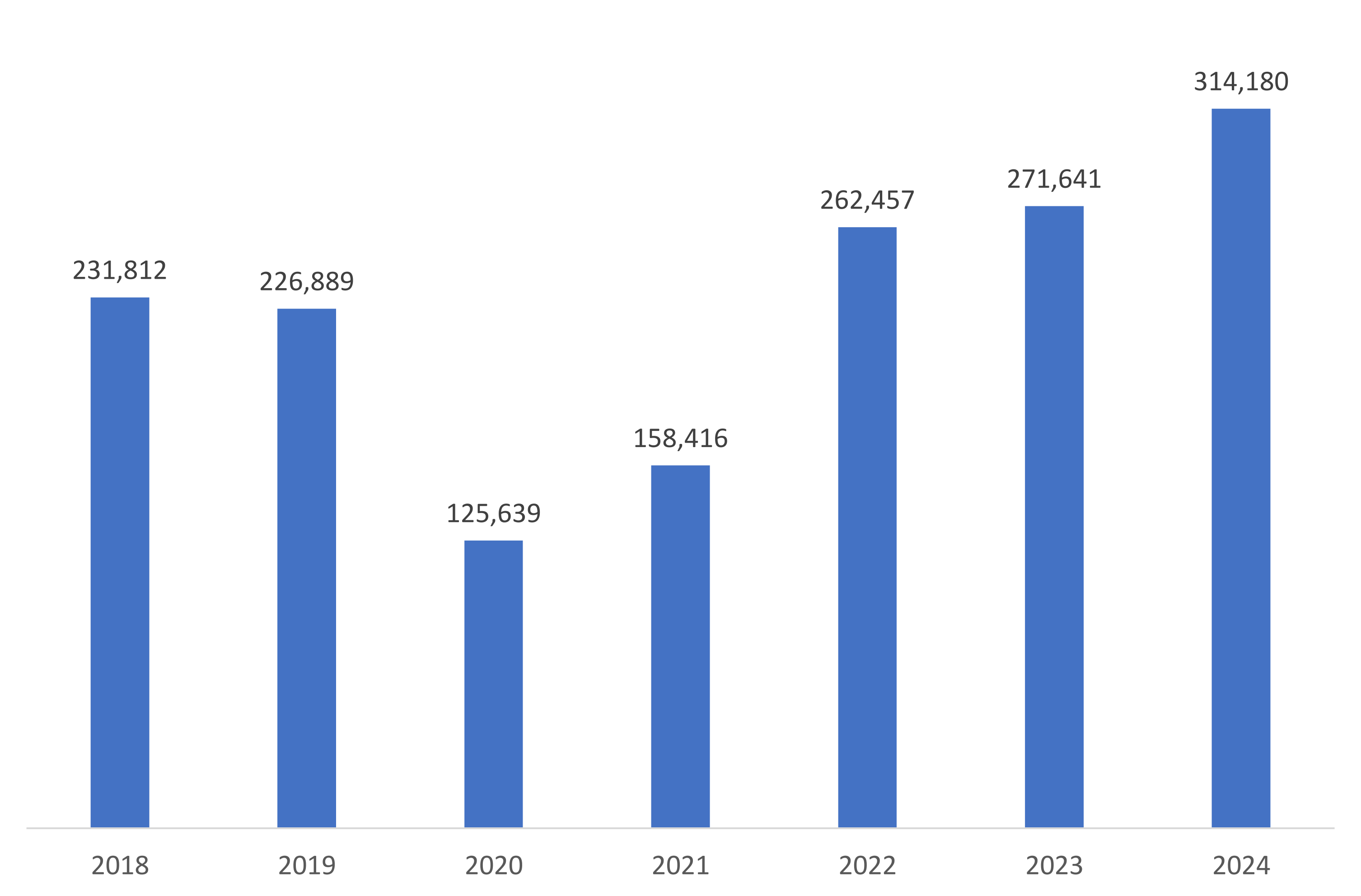
2024 and 2018-2024

**Arrivals,
paid accommodation, 2024**

314.180

+16% (vs. 2023)

+38% (vs. 2019)



Source: Statec

Length of stay, paid accommodation

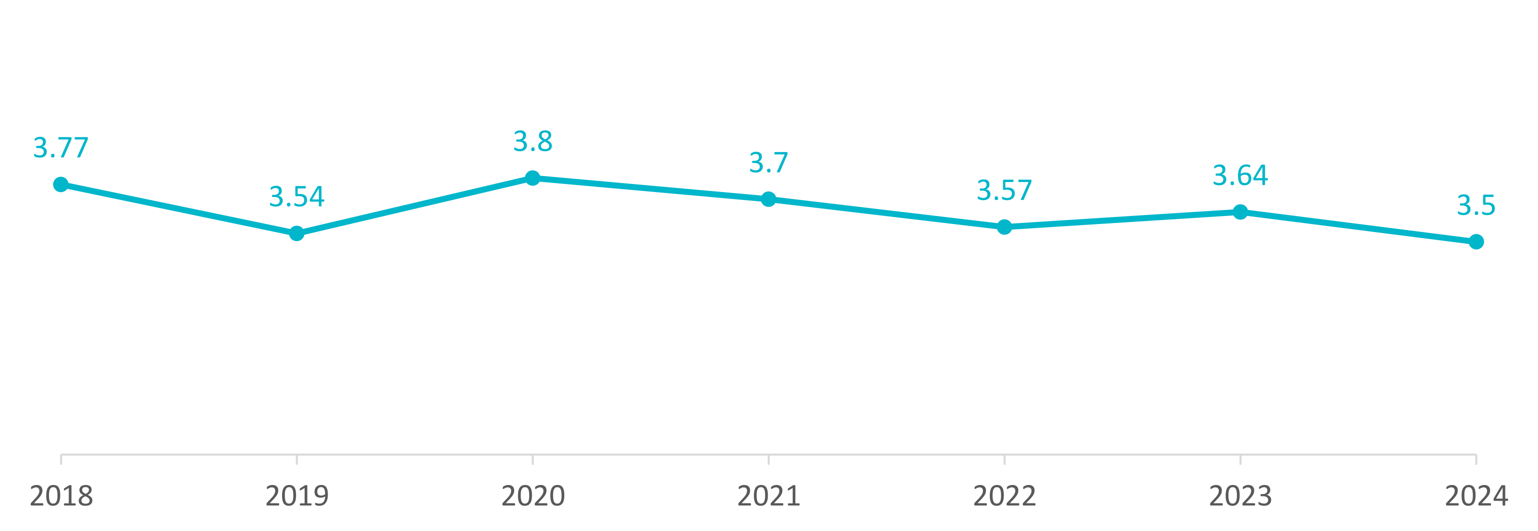
2024 and 2018-2024

Average length of stay, paid accommodation, 2024

3.5 nights

-0.14 nights (vs. 2023)

-0.04 nights (vs. 2019)

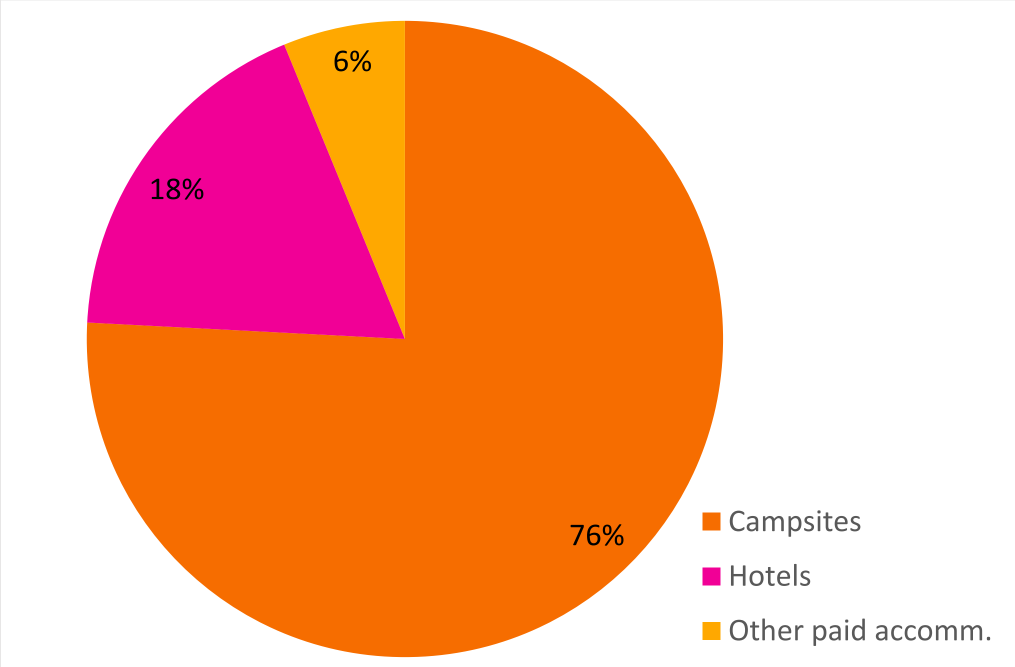


Source: Statec

Nights & arrivals in paid accommodation

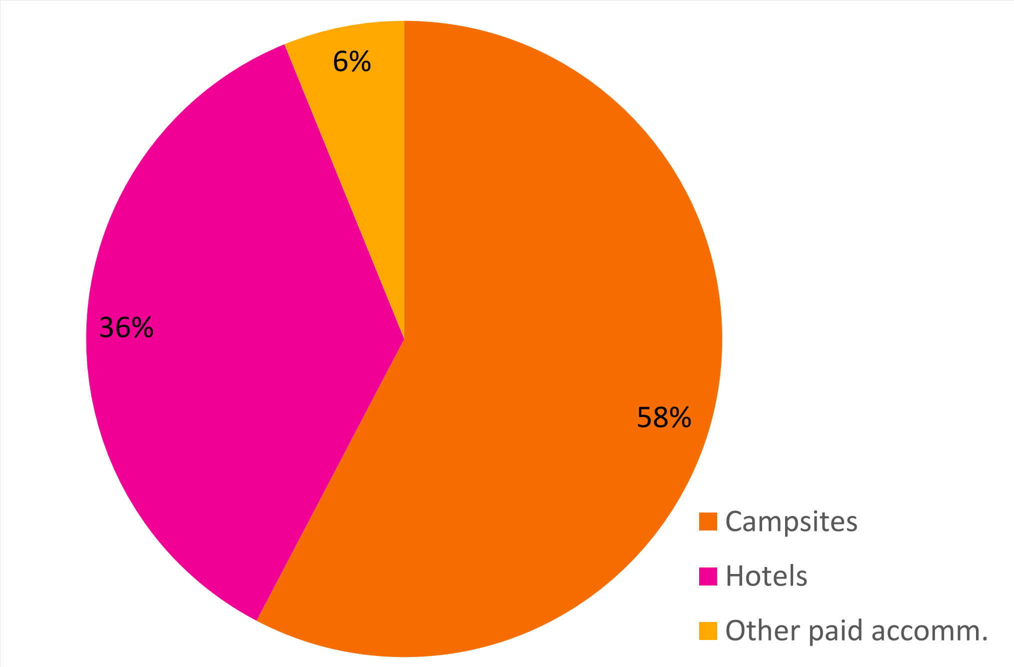
Type of accommodation, 2024

Nights, paid accommodation, 2024



Campsites	834.377	+14% (vs. 2023)	+43% (vs. 2019)
Hotels	197.875	+8% (vs. 2023)	+35% (vs. 2019)
Other paid accomm.	68.166	-8% (vs. 2023)	-4% (vs. 2019)

Arrivals, paid accommodation, 2024



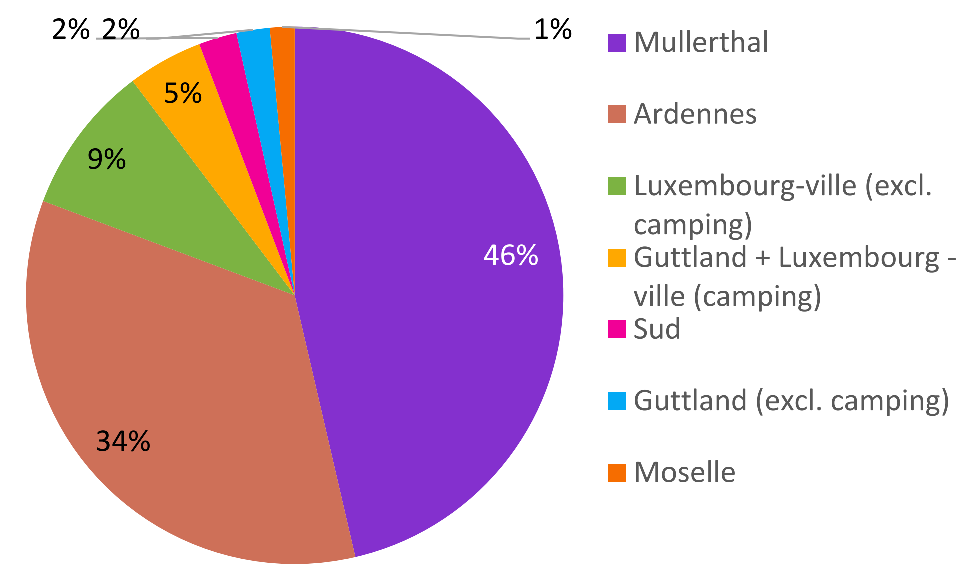
Campsites	181.244	+23% (vs. 2023)	+43% (vs. 2019)
Hotels	113.614	+9% (vs. 2023)	+35% (vs. 2019)
Other paid accomm.	19.322	-1% (vs. 2023)	+25% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

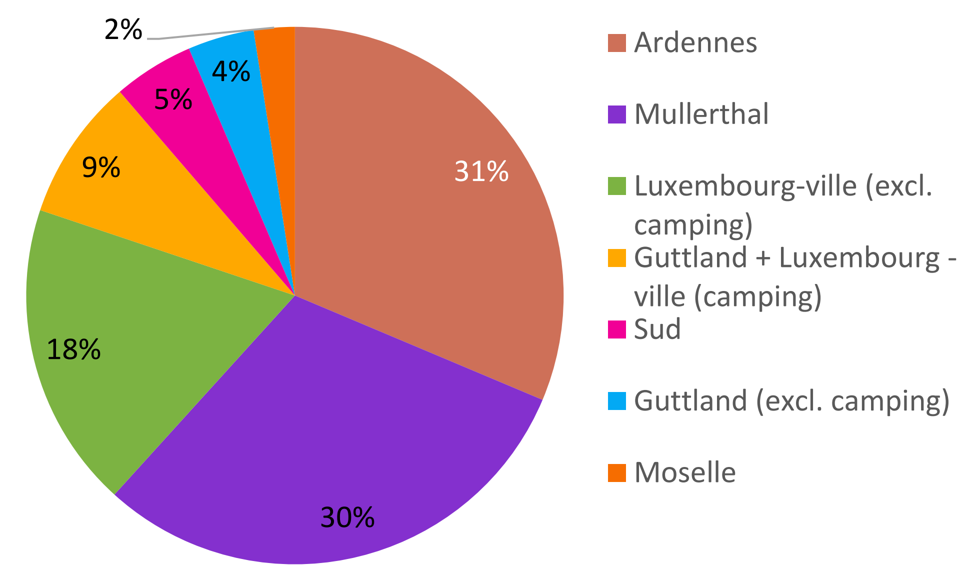
Regions, 2024

Nights, paid accommodation, 2024



MPSL	510.282	+26% (vs. 2023)	+65% (vs. 2019)
Eislek	377.844	+2% (vs. 2023)	+17% (vs. 2019)
Lux.-City (excl. camping)	98.842	+10% (vs. 2023)	+47% (vs. 2019)
Guttland/Lux.-City (camping)	49.887	-9% (vs. 2023)	-11% (vs. 2019)
South	25.245	+2% (vs. 2023)	+57% (vs. 2019)
Guttland (excl. camping)	22.015	+0% (vs. 2023)	+6% (vs. 2019)
Moselle	16.303	-21% (vs. 2023)	+44% (vs. 2019)

Arrivals, paid accommodation, 2024



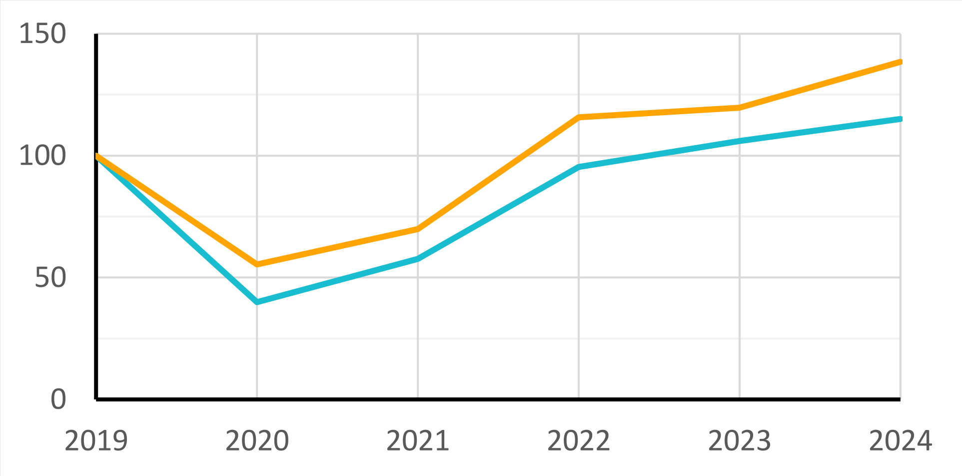
Eislek	98.482	+18% (vs. 2023)	+37% (vs. 2019)
MPSL	95.443	+28% (vs. 2023)	+60% (vs. 2019)
Lux.-City (excl. camping)	57.891	+12% (vs. 2023)	+52% (vs. 2019)
Guttland/Lux.-City (camping)	26.870	+7% (vs. 2023)	-8% (vs. 2019)
South	15.227	+0% (vs. 2023)	+37% (vs. 2019)
Guttland (excl. camping)	12.534	+4% (vs. 2023)	+12% (vs. 2019)
Moselle	7.733	-16% (vs. 2023)	+33% (vs. 2019)

Source: Statec

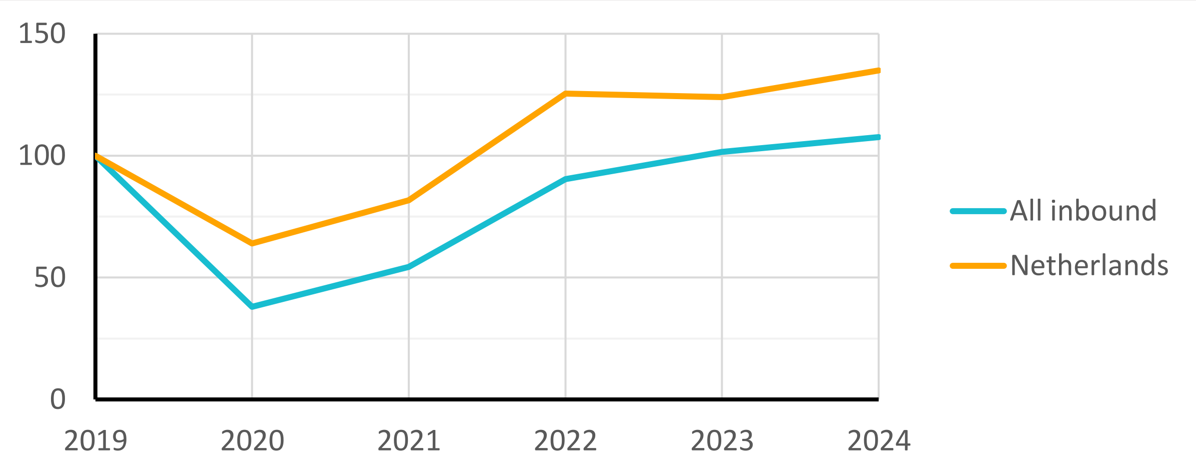
Arrivals in paid accommodation

Trends 2019-2024

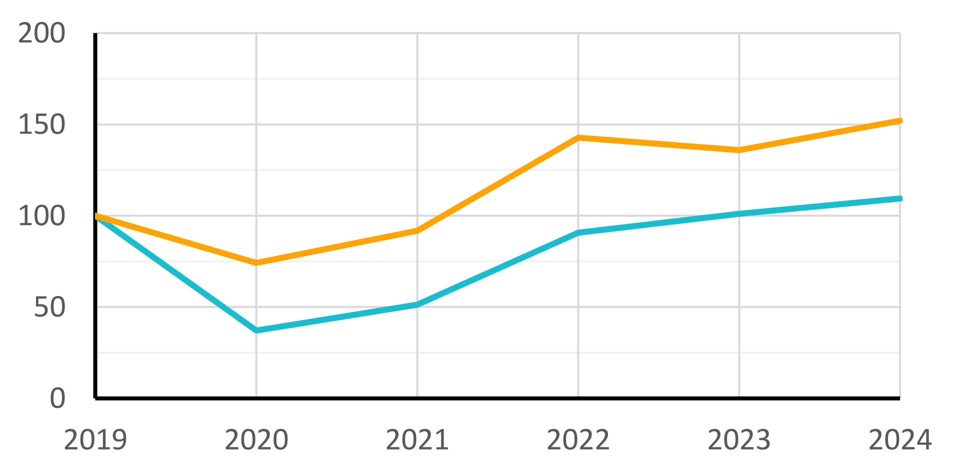
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



All paid accommodation (*), Luxembourg City (2019 = Index 100)

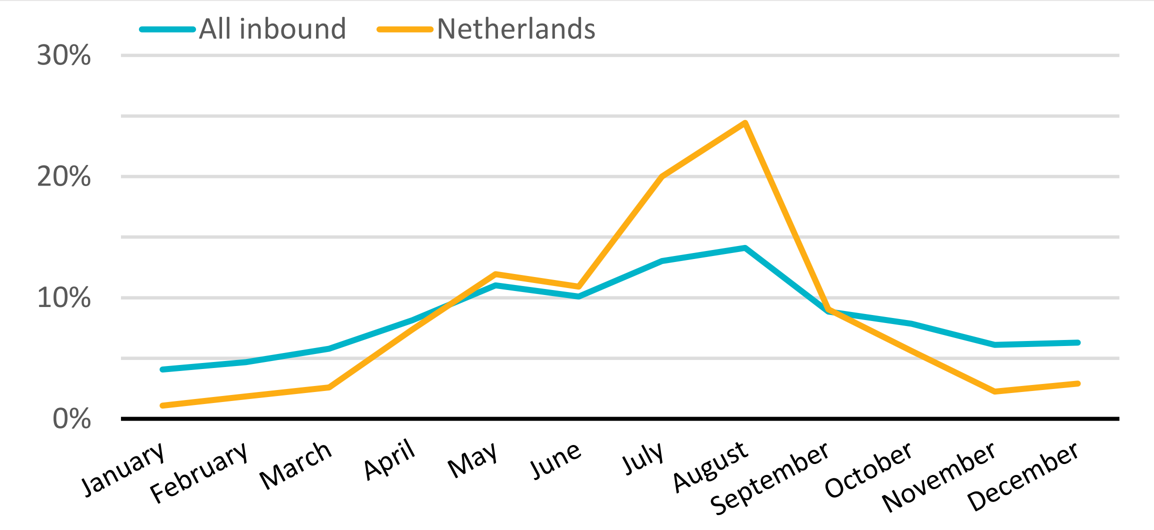


(*) excluding camping.
Source: Statec

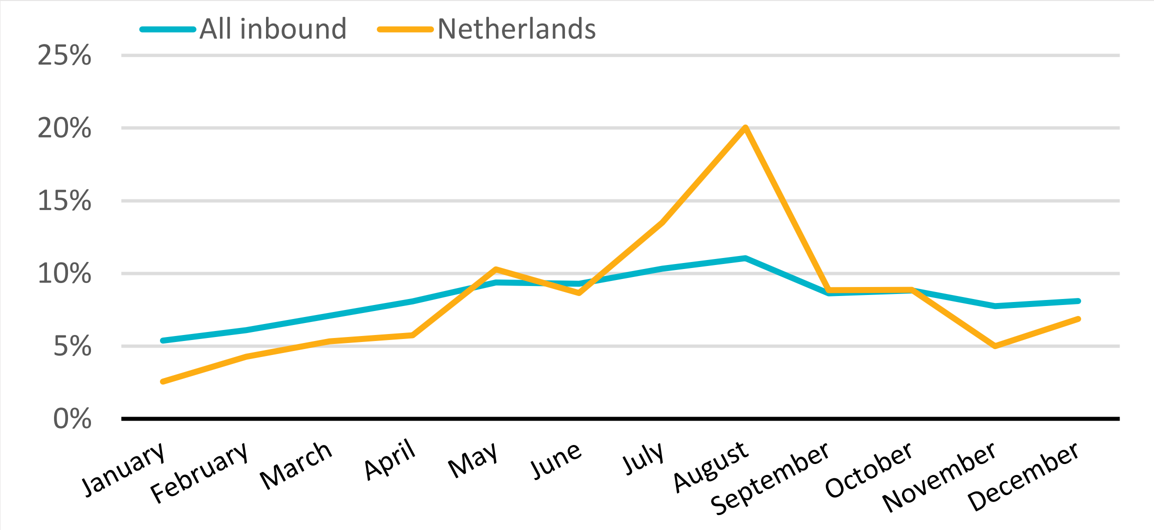
Arrivals in paid accommodation

Seasonality

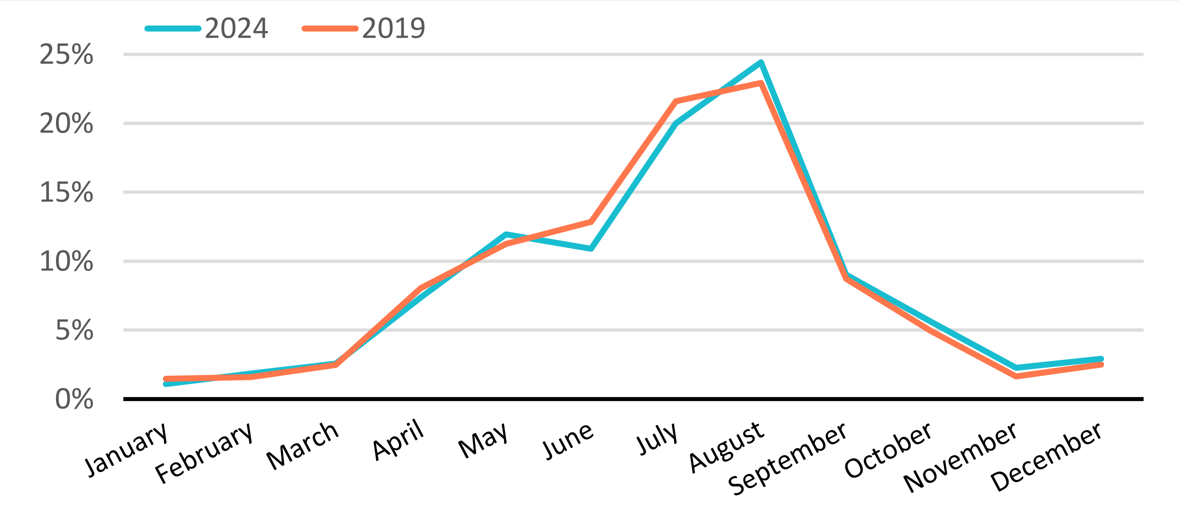
All paid accommodation, 2024



Hotels, 2024



All paid accommodation, arrivals from Netherlands



Source: Statec

Short-term rentals

2024 and 2018-2024

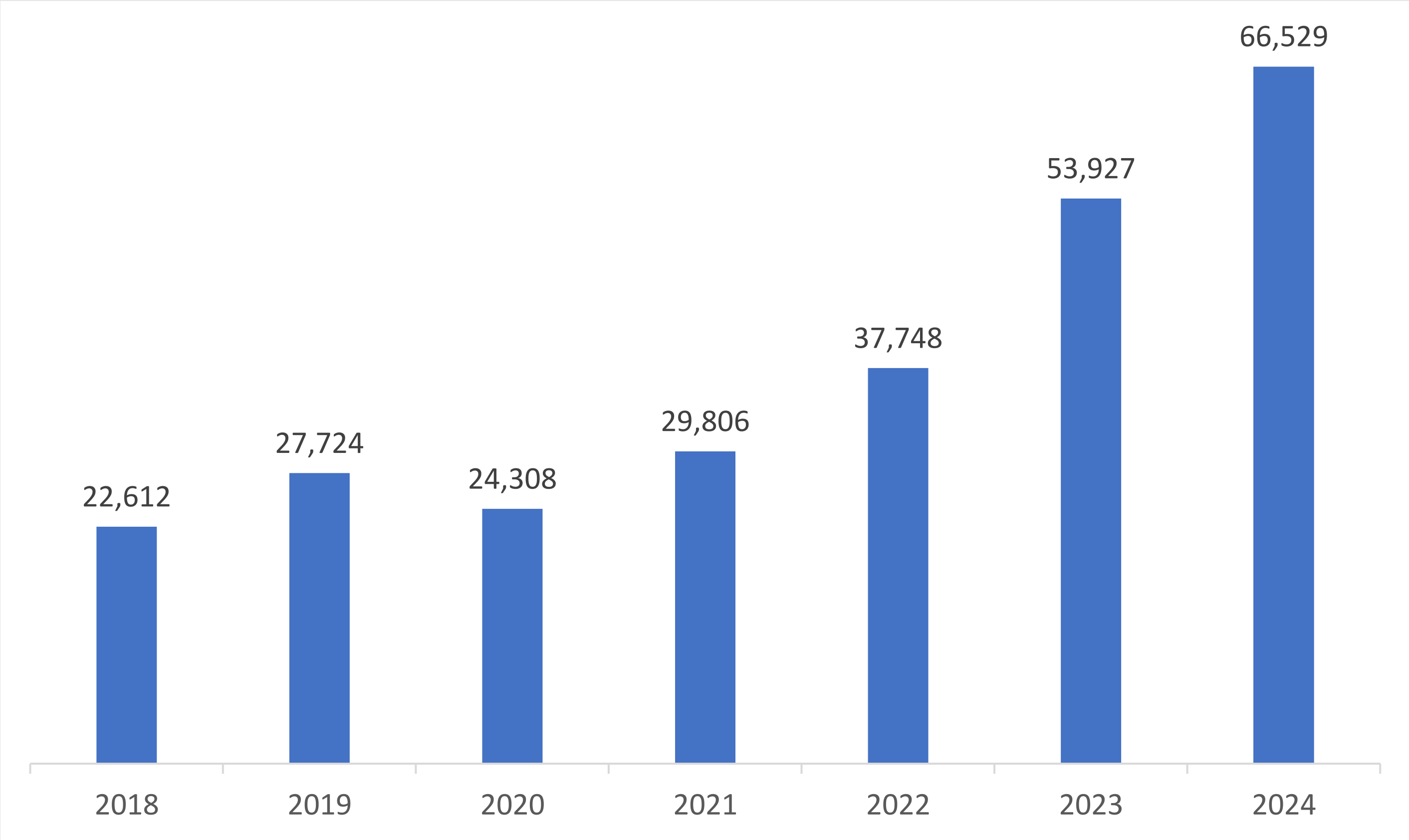
**Nights,
Short-term rentals, 2024**

66.529

23% (vs. 2023)

140% (vs. 2019)

**Nights,
Short-term rentals, 2018-2024**



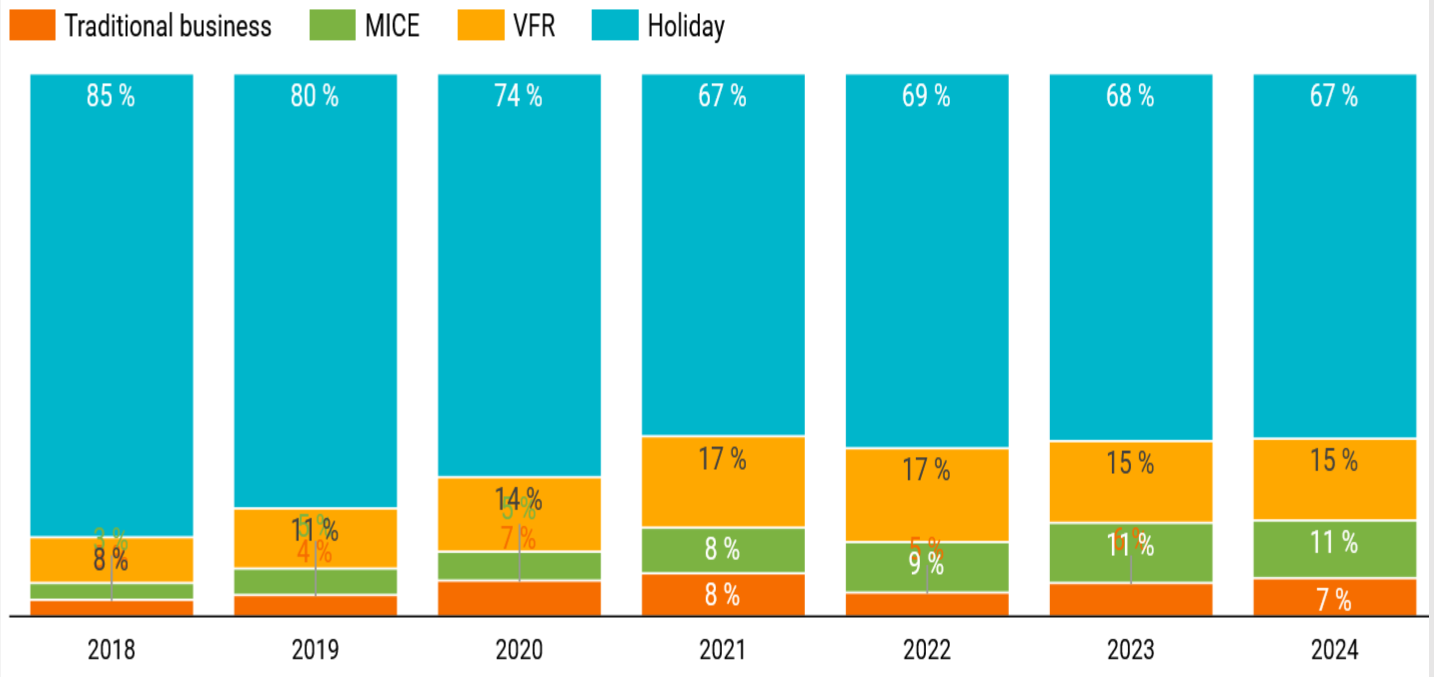
Source: Eurostat (experimental statistics).

Characteristics of inbound trips

Dutch trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2018-2024

Dutch trips to Luxembourg, 2018-2024



2024

	Netherlands to Luxembourg	Europe to Luxembourg
Holiday	67%	61%
VFR	15%	15%
MICE	11%	15%
Traditional Business	7%	8%

Source: World Travel Monitor/IPK International.

Inbound same-day trips to Luxembourg

2024

Number of inbound same-day trips, 2024 (estimate)

480.000

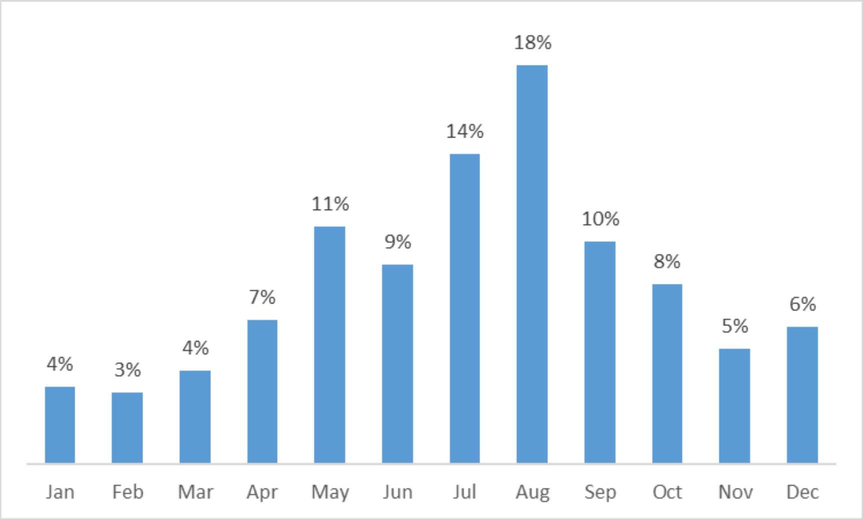
+17% (vs. 2023)

Average length of same-day trips

7,3 h

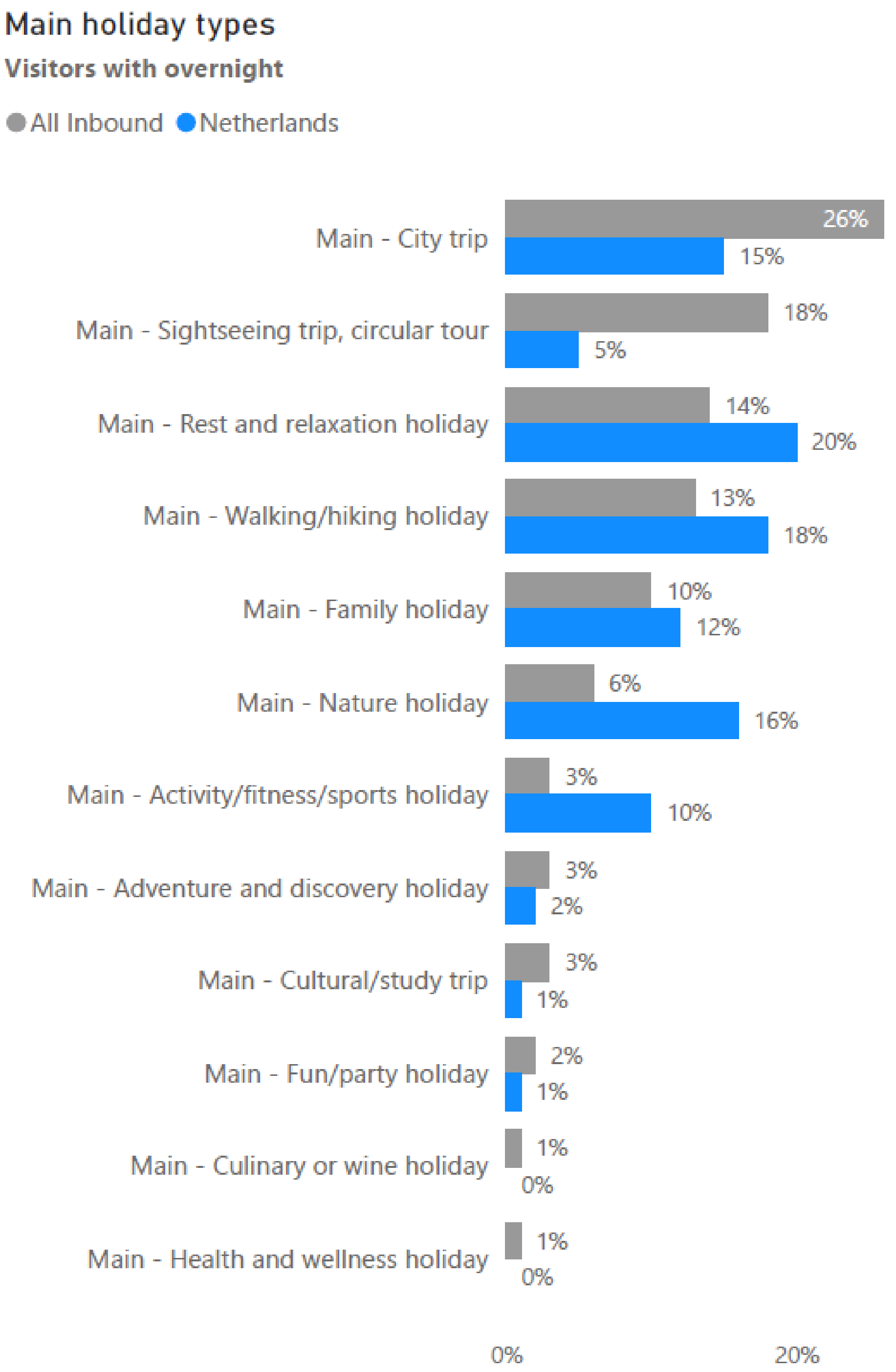
-0,3 h (vs. 2023)

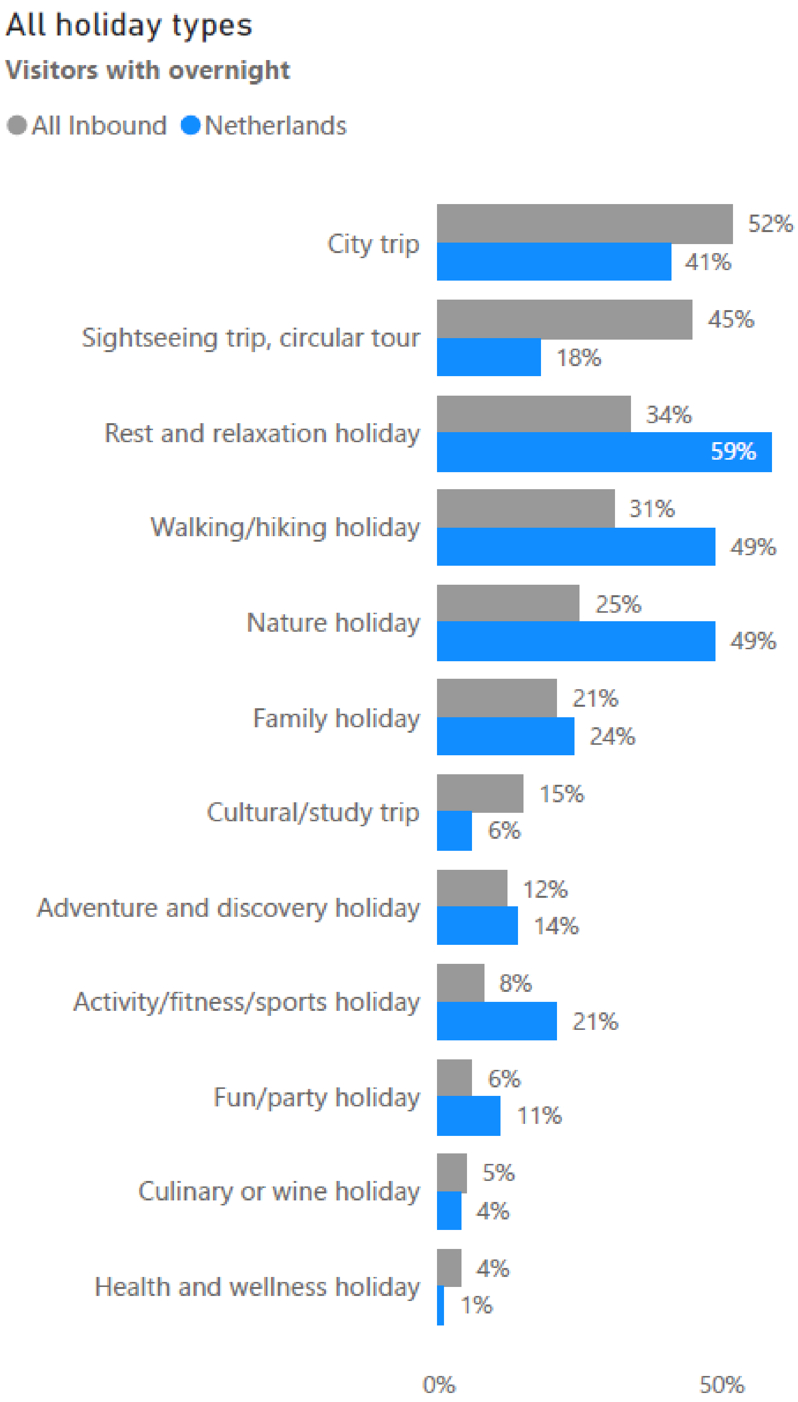
Seasonality
% of same-day trips

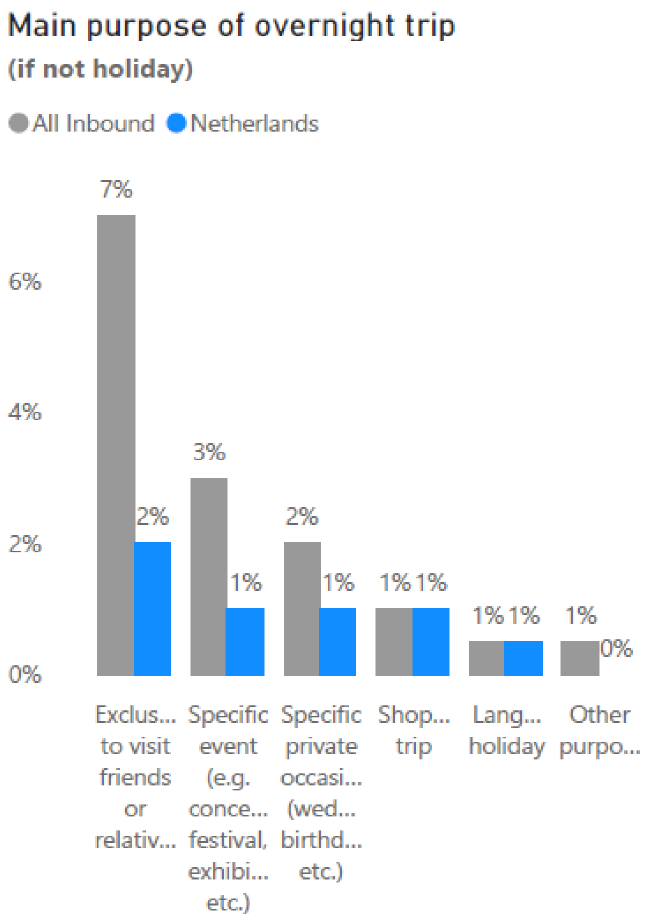


Sources: LFT estimates, Mobile phone data (Editus/LFT), LFT/Ilres Visitor Survey.

Travel behaviour of inbound leisure visitors

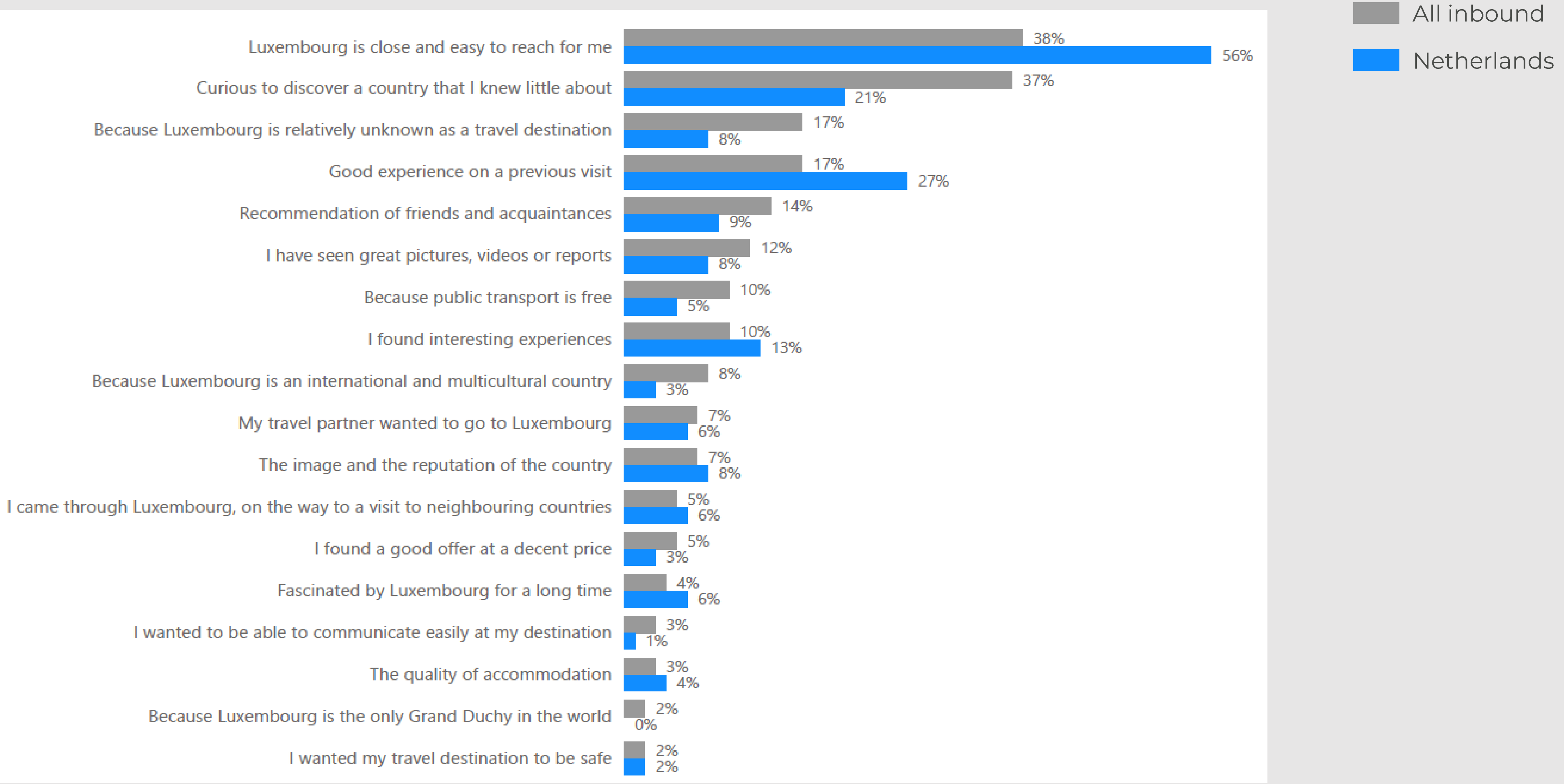

Main holiday types
Visitors with overnight
All Inbound
Netherlands
Main - City trip
Main - Sightseeing trip, circular tour
Main - Rest and relaxation holiday
Main - Walking/hiking holiday
Main - Family holiday
Main - Nature holiday
Main - Activity/fitness/sports holiday
Main - Adventure and discovery holiday
Main - Cultural/study trip
Main - Fun/party holiday
Main - Culinary or wine holiday
Main - Health and wellness holiday
26%
15%
18%
5%
14%
20%
13%
18%
10%
12%
6%
16%
3%
10%
3%
2%
3%
1%
2%
1%
1%
0%
1%
0%
0%
20%


All holiday types
Visitors with overnight
All Inbound
Netherlands
City trip
Sightseeing trip, circular tour
Rest and relaxation holiday
Walking/hiking holiday
Nature holiday
Family holiday
Cultural/study trip
Adventure and discovery holiday
Activity/fitness/sports holiday
Fun/party holiday
Culinary or wine holiday
Health and wellness holiday
52%
41%
45%
18%
34%
59%
31%
49%
25%
49%
21%
24%
15%
6%
12%
14%
8%
21%
6%
11%
5%
4%
4%
1%
0%
50%


Main purpose of overnight trip
(if not holiday)
All Inbound
Netherlands
7%
2%
3%
1%
2%
1%
1% 1%
1% 1%
1%
0%
6%
4%
2%
0%
Exclus... to visit friends or relativ...
Specific event (e.g. conce... festival, exhibi... etc.)
Specific private occasi... (wed... birthd... etc.)
Shop... trip
Lang... holiday
Other purpo...

Key decision criteria for choosing Luxembourg

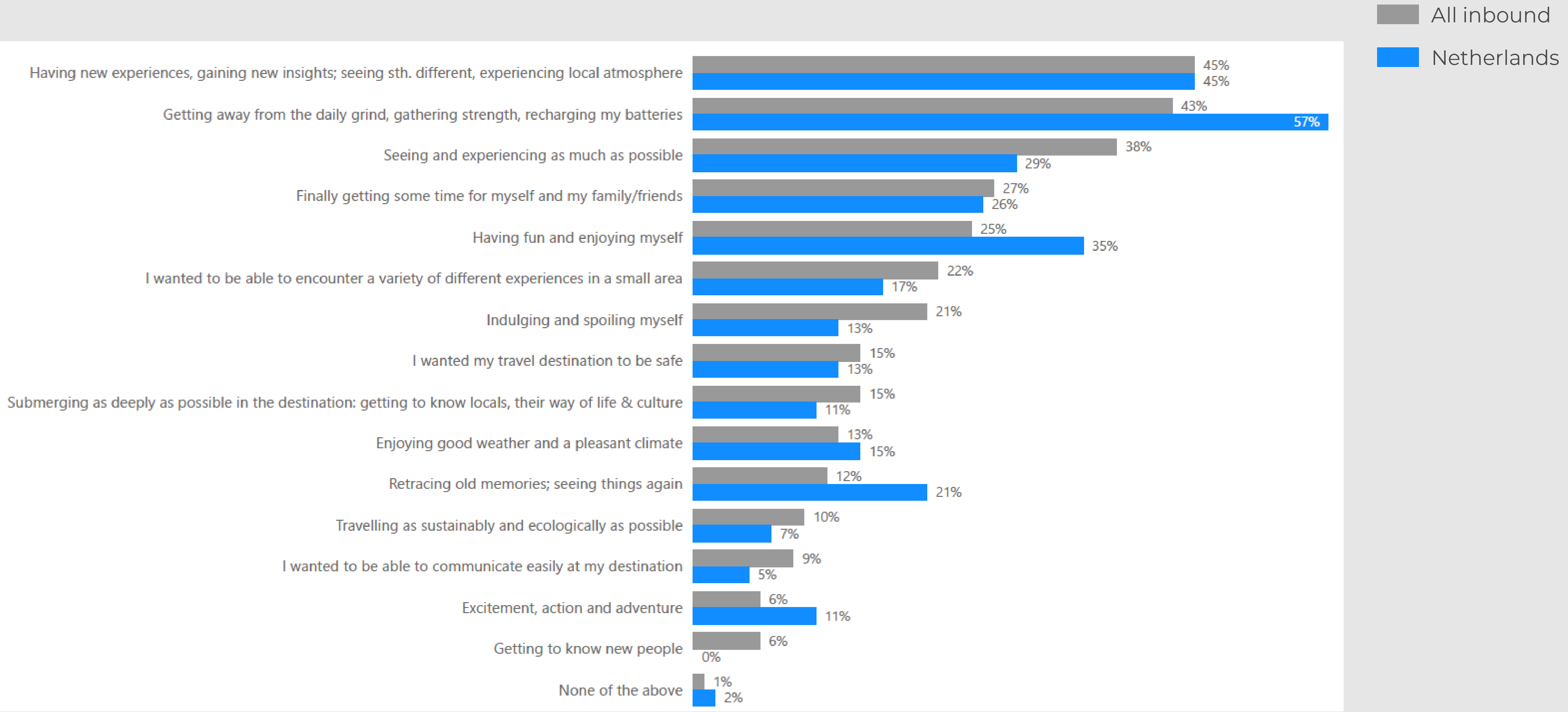
Inbound leisure visitors with overnight (*), 2023-2024



Source: LFT/Ilres Visitor Survey.
(*) Maximum 3 answers possible.

Key travel motives

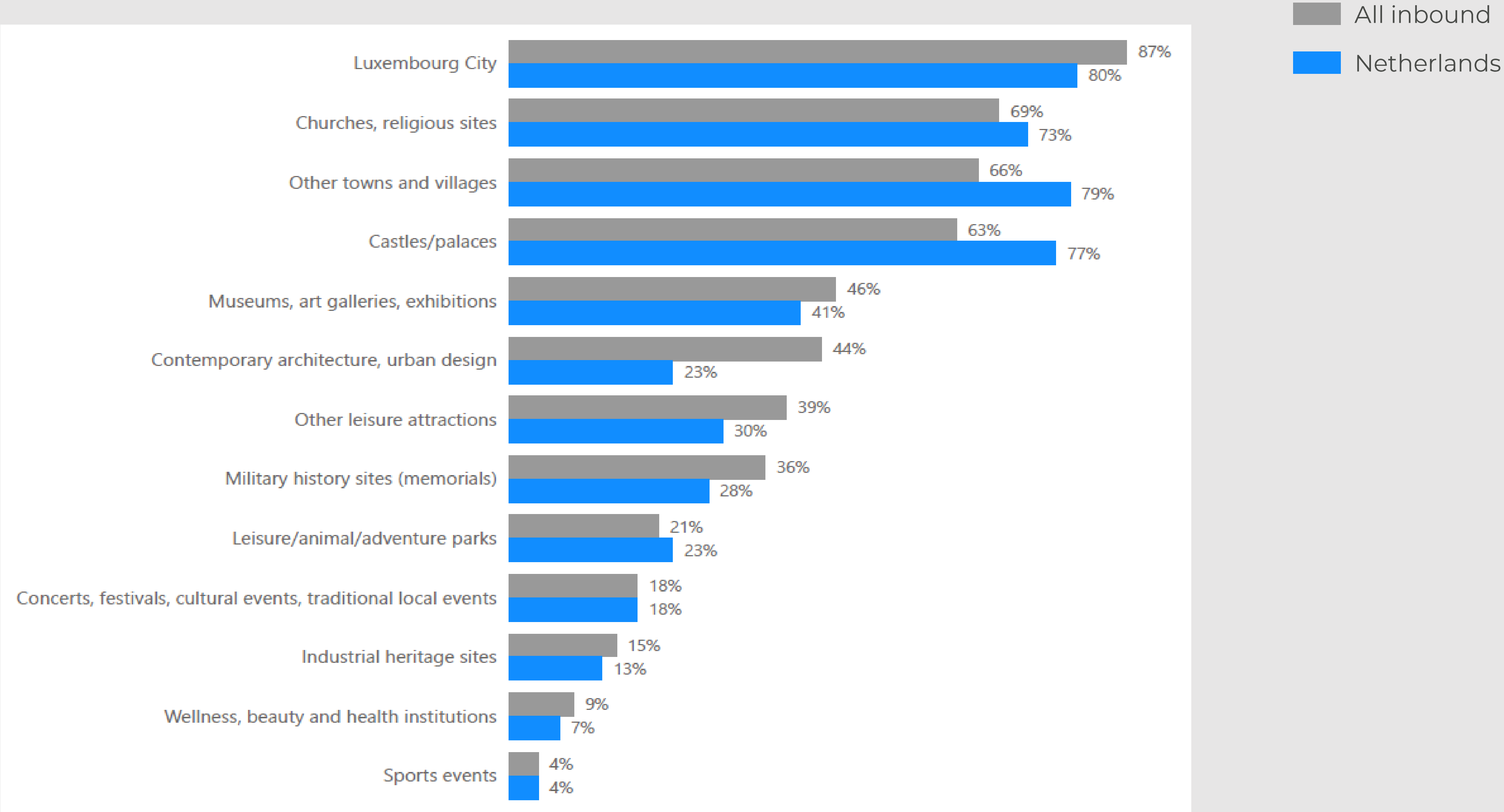
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Type of places visited in Luxembourg

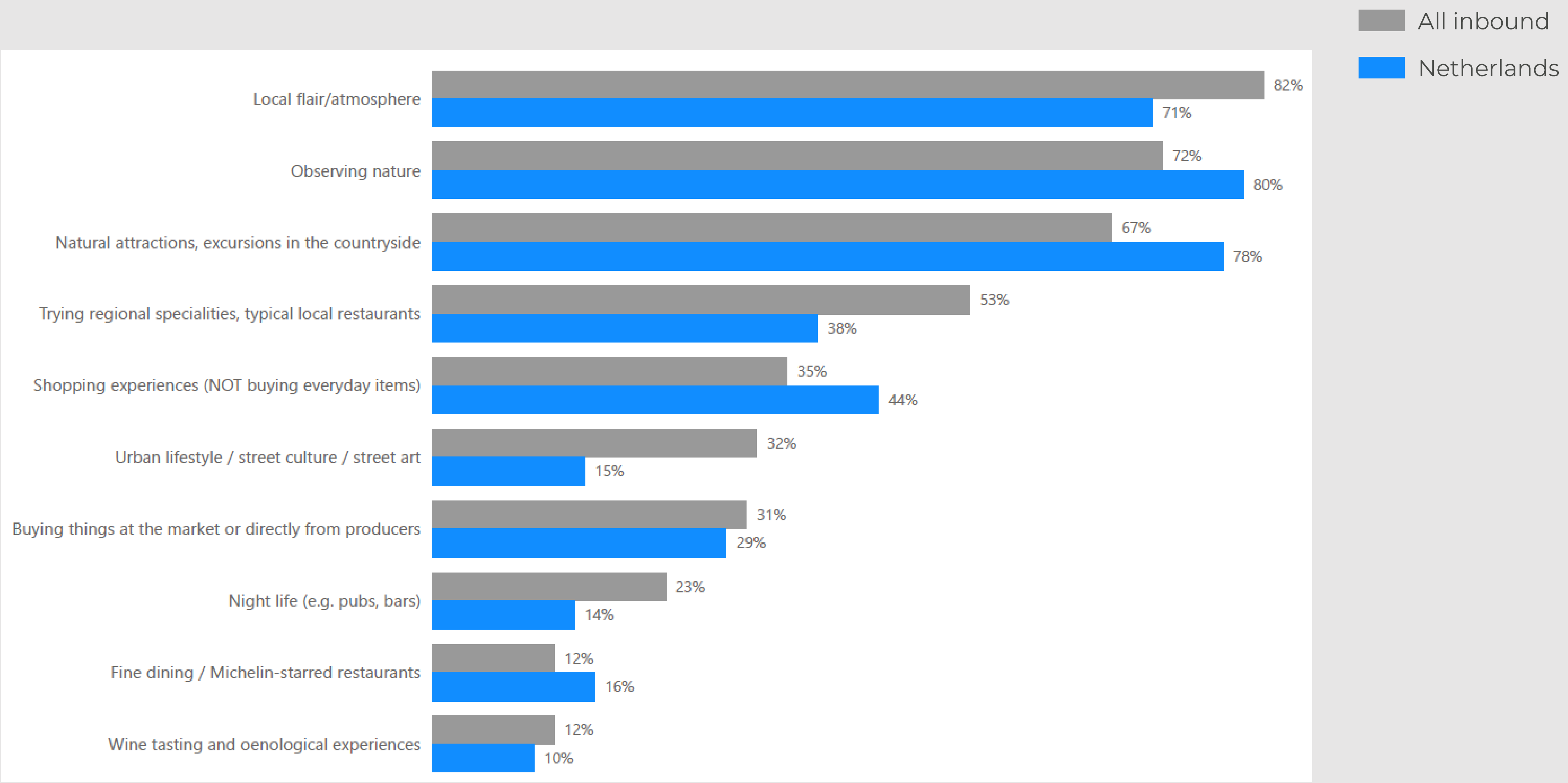
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Non-sporting activities undertaken in Luxembourg

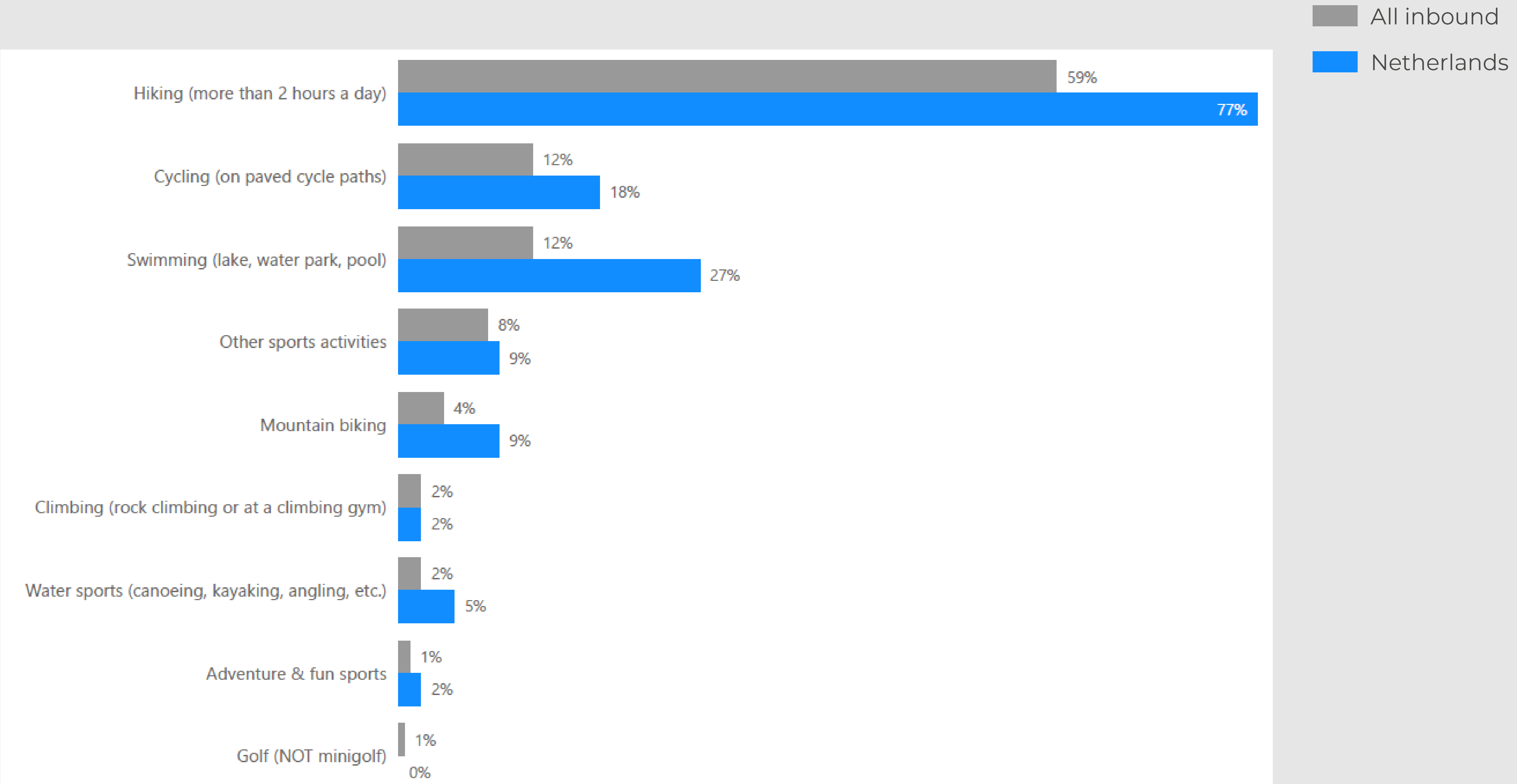
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Sporting activities undertaken in Luxembourg

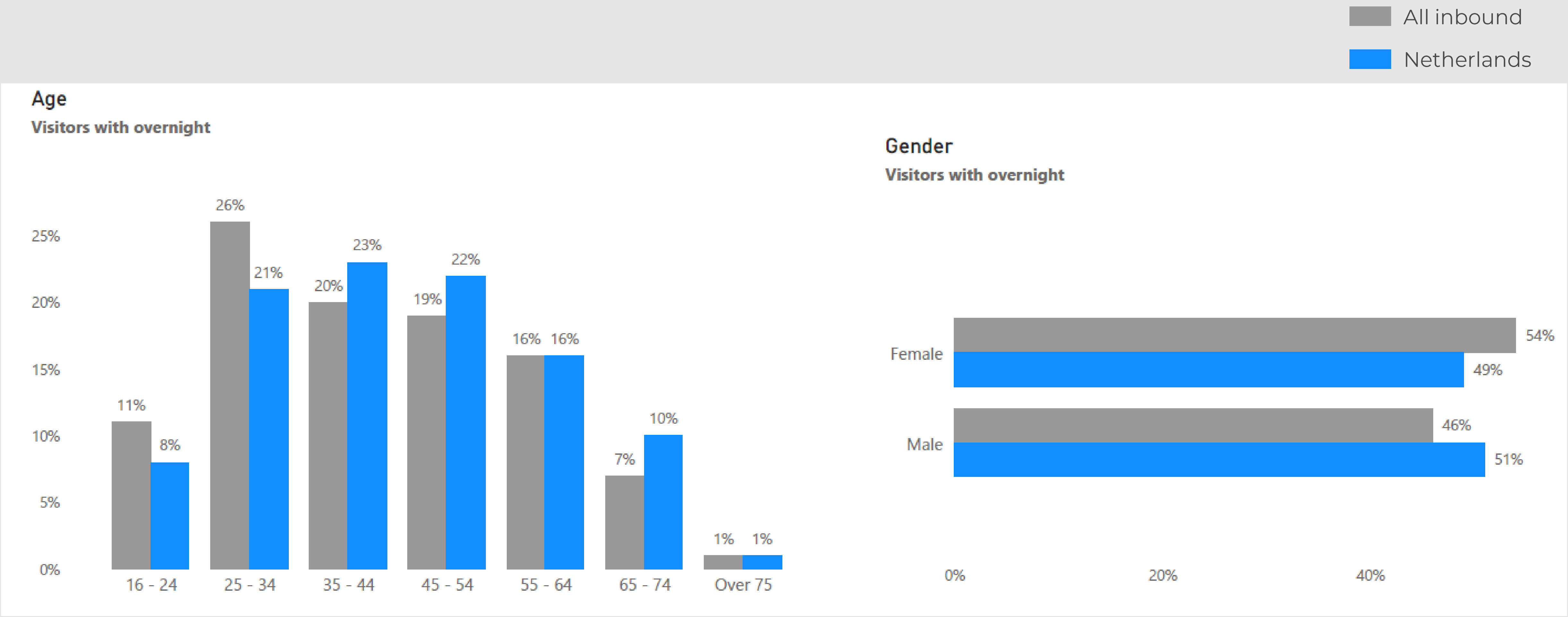
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Age groups

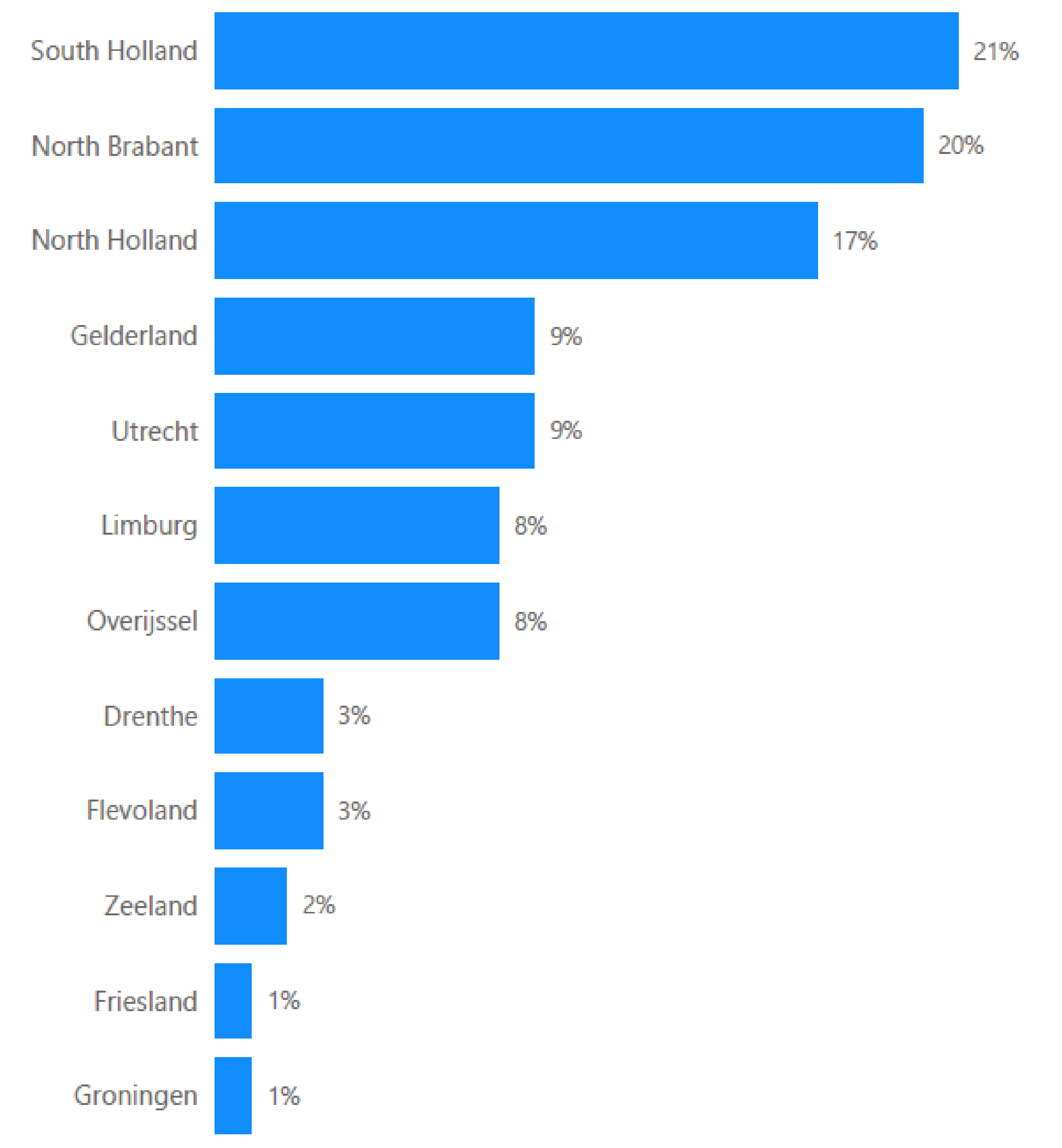
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Region of origin

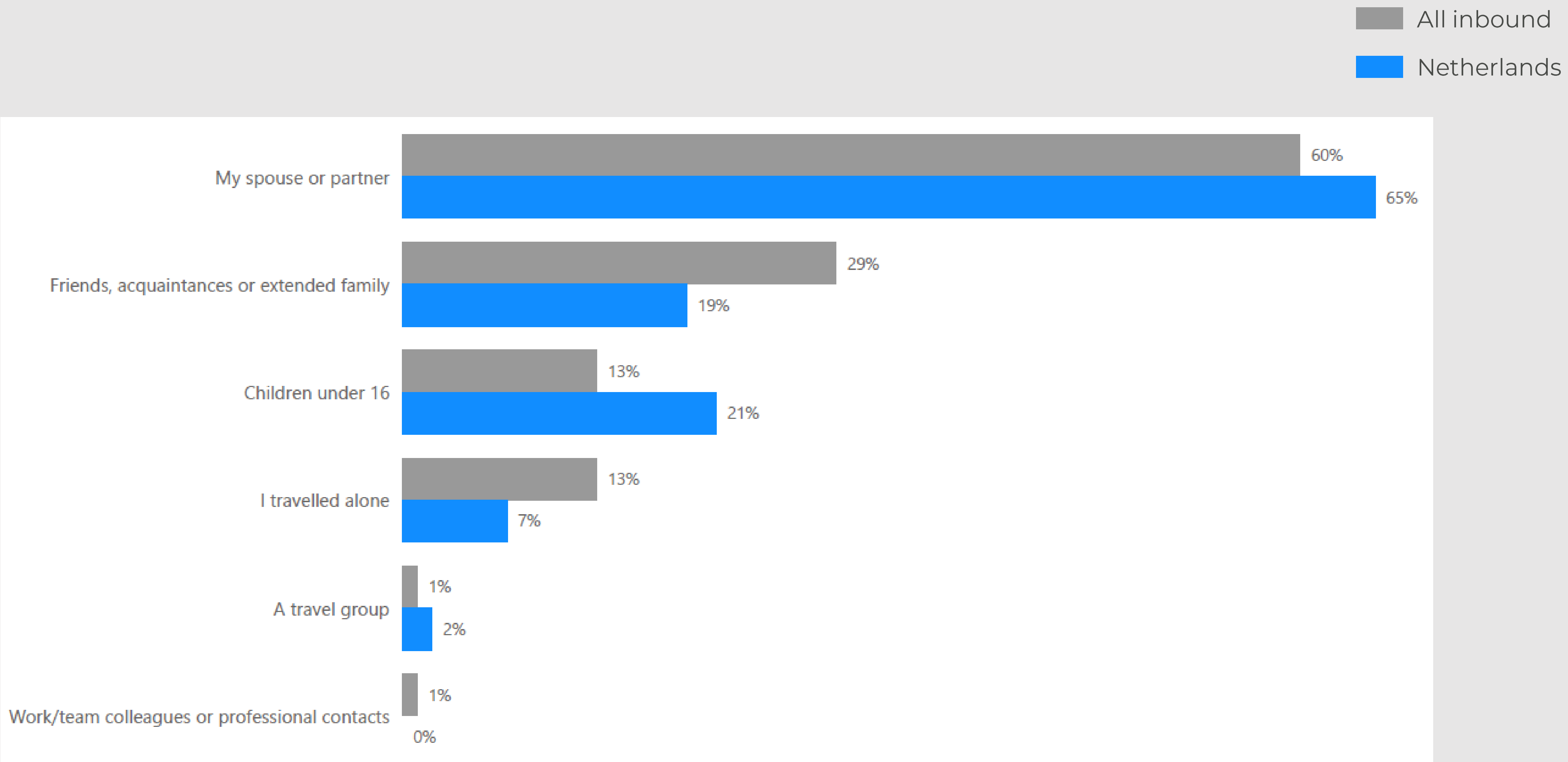
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Travel party

Inbound leisure visitors with overnight, 2023-2024

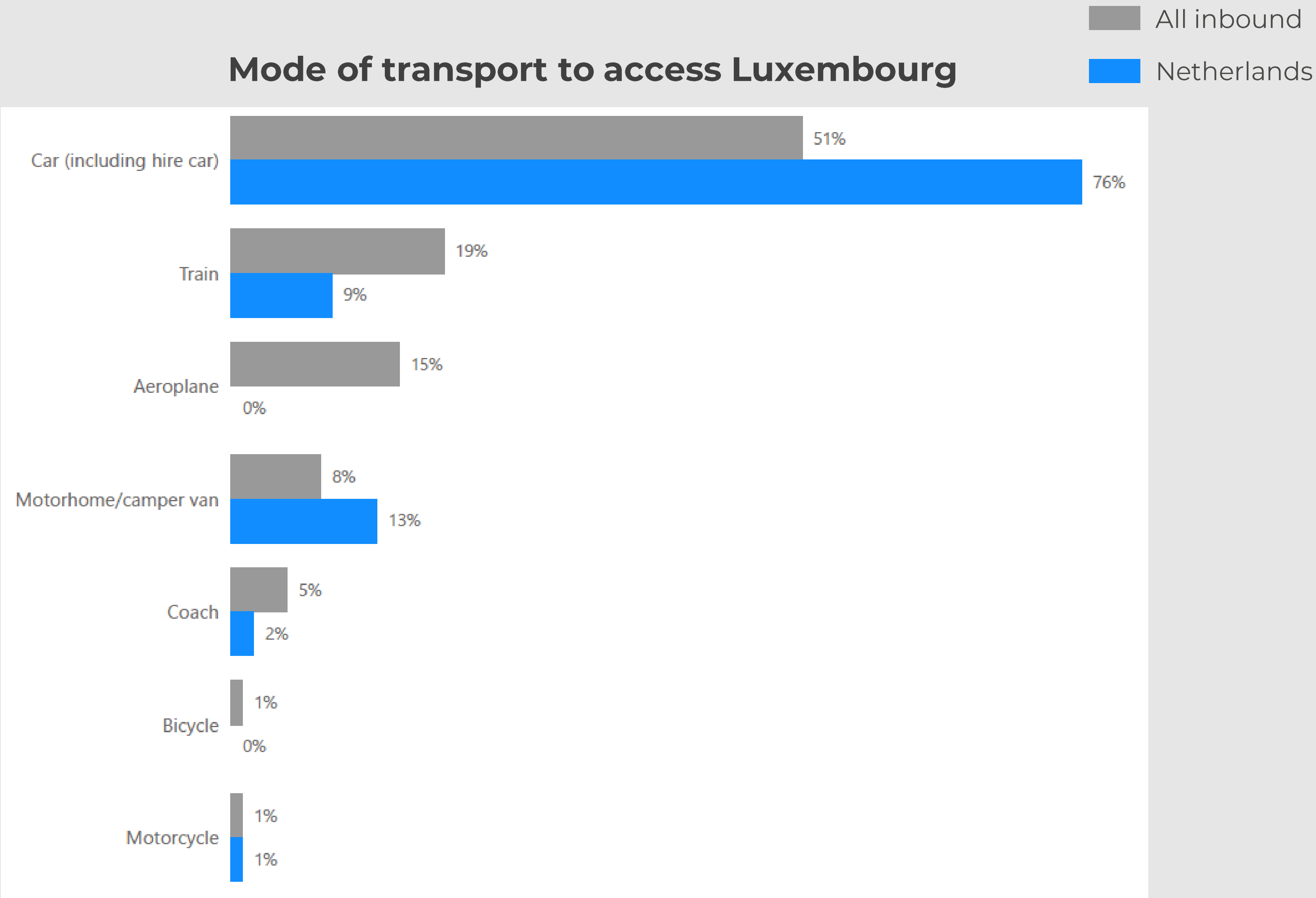


Source: LFT/Ilres Visitor Survey.

Transport, new visitors and cross-border trips

Inbound leisure visitors with overnight, 2023-2024

Mode of transport to access Luxembourg



First-time visitors

Visitors with overnight

63%

All Inbound

50%

Netherlands

Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

39%

All Inbound

39%

Netherlands

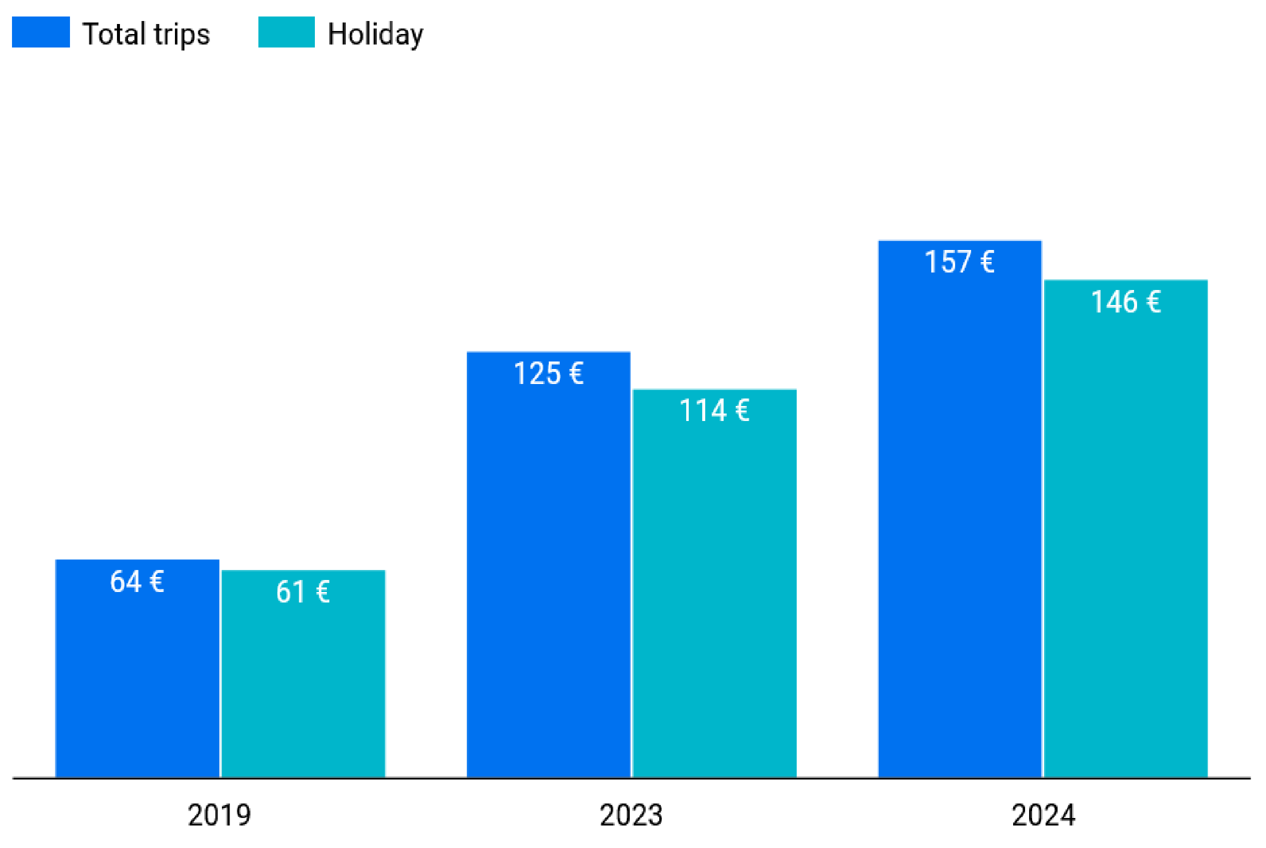
Source: LFT/Ilres Visitor Survey.

Expenditure

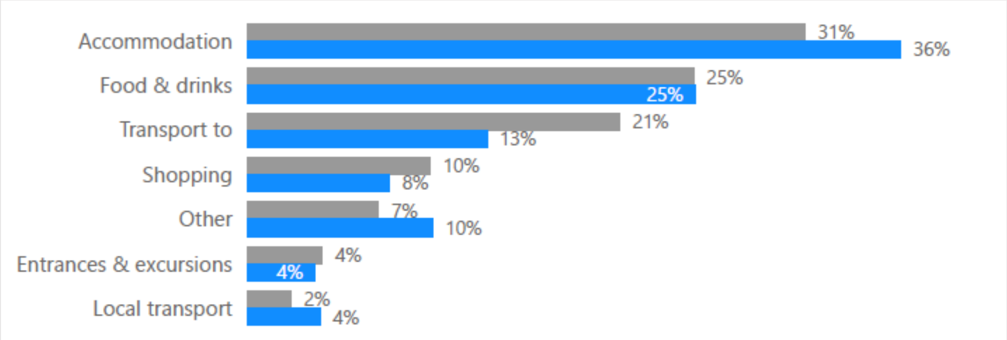
Inbound trips to Luxembourg with overnight (all accommodation)

All inbound
Netherlands

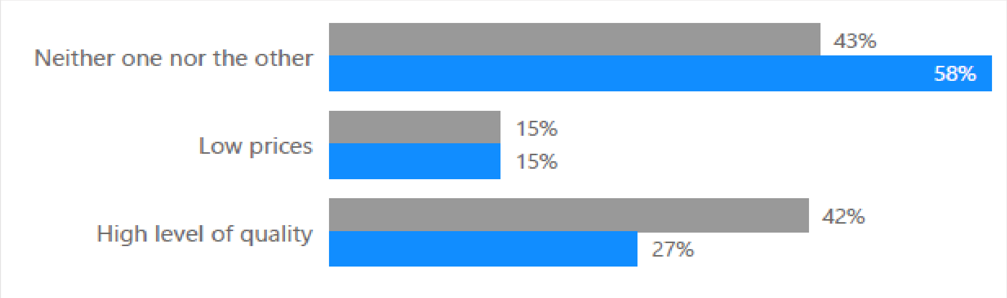
Average expenditure/pers./day



Expenditure of leisure inbound visitors by categories, 2023-2024



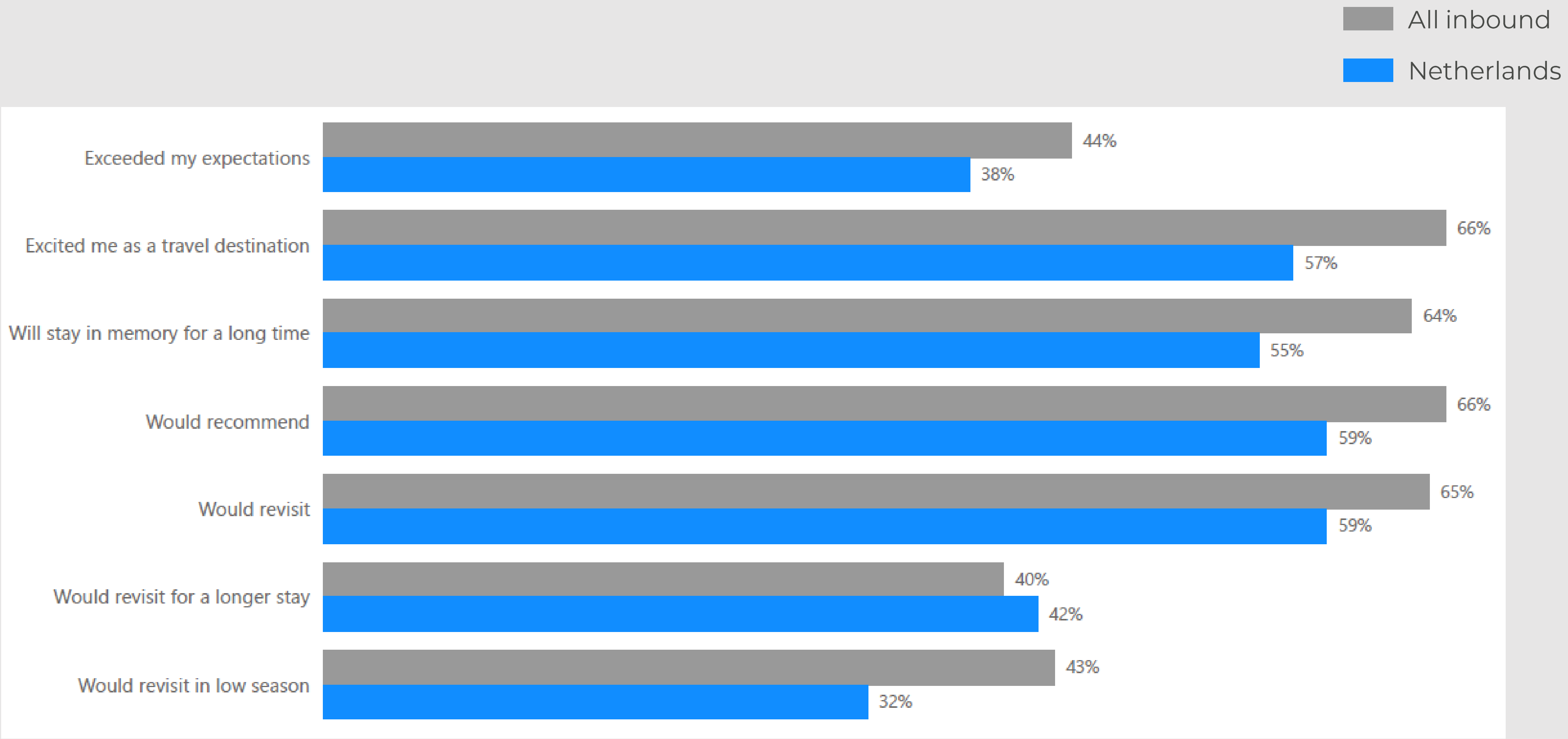
Quality vs. price-orientation of leisure inbound visitors, 2023-2024



Sources: World Travel Monitor/IPK International, LFT/Ilres Visitor Survey.

Visitor satisfaction and recommendation

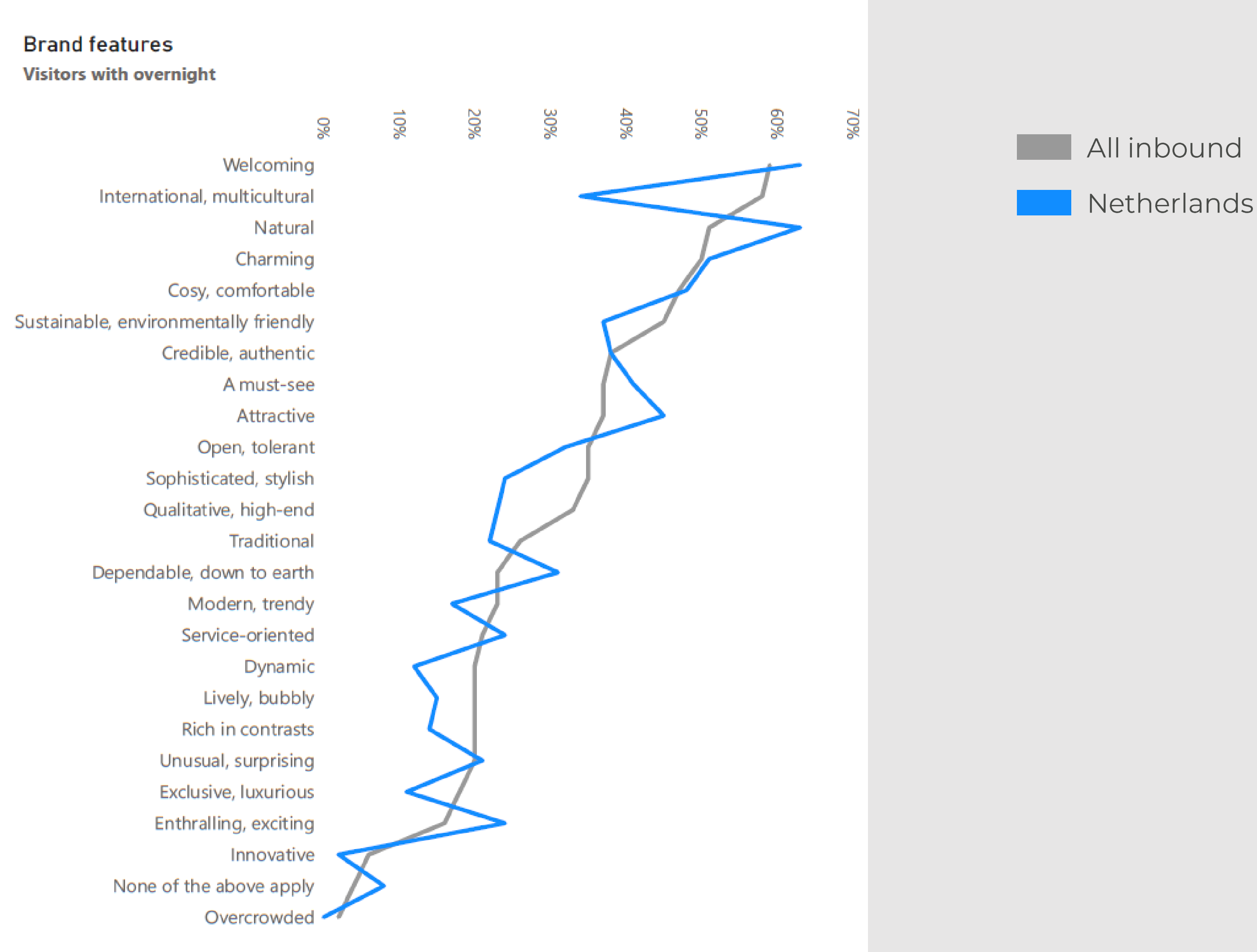
Inbound leisure visitors, 2023-2024



Source: LFT/Ilres Visitor Survey.

Brand features perception

Inbound leisure visitors with overnights, 2023-2024



LFT Target Segments

Explorers

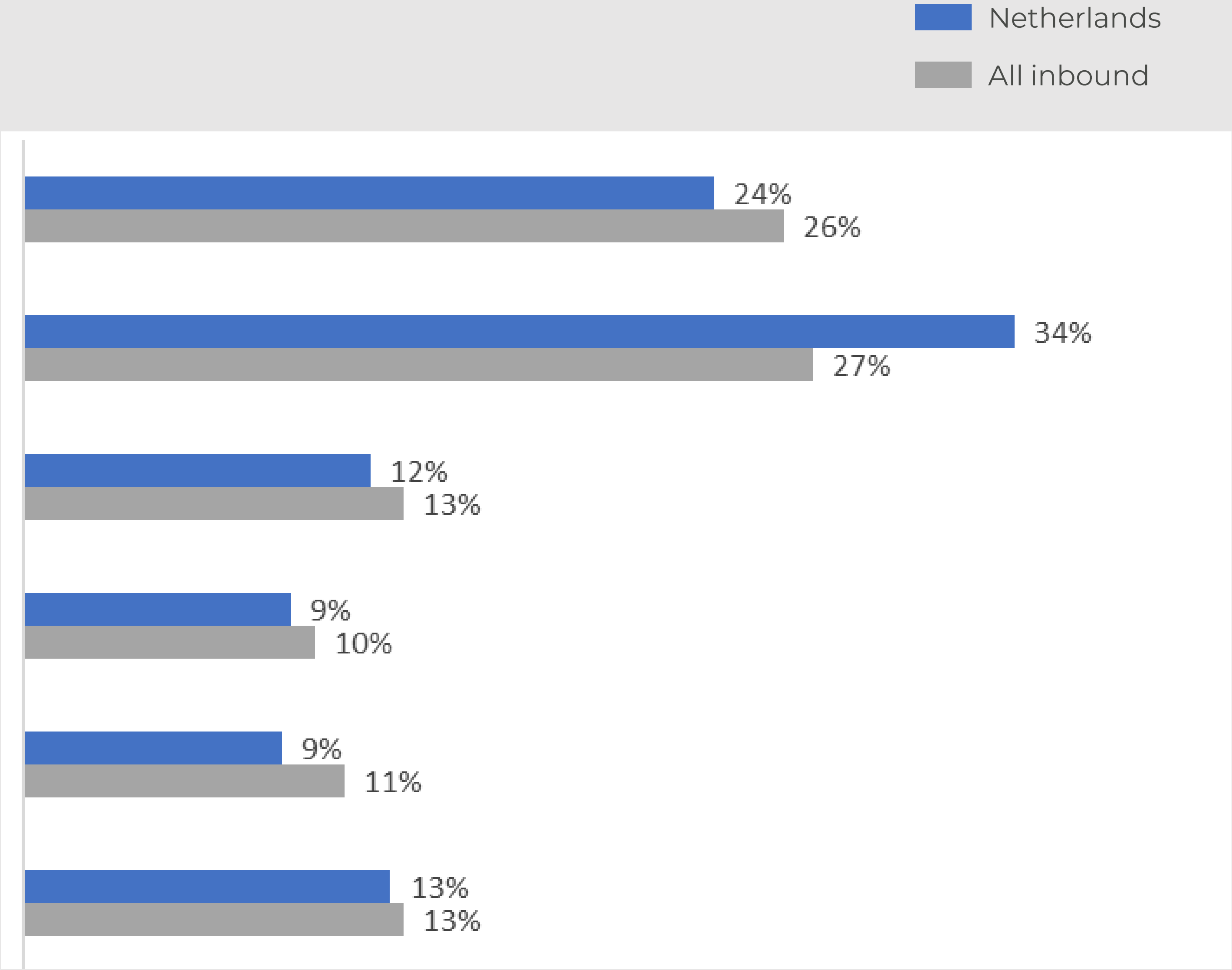
Nature-Loving Actives

Relaxation Seekers

Short Breakers

Perfection Seekers

Leisure Oriented

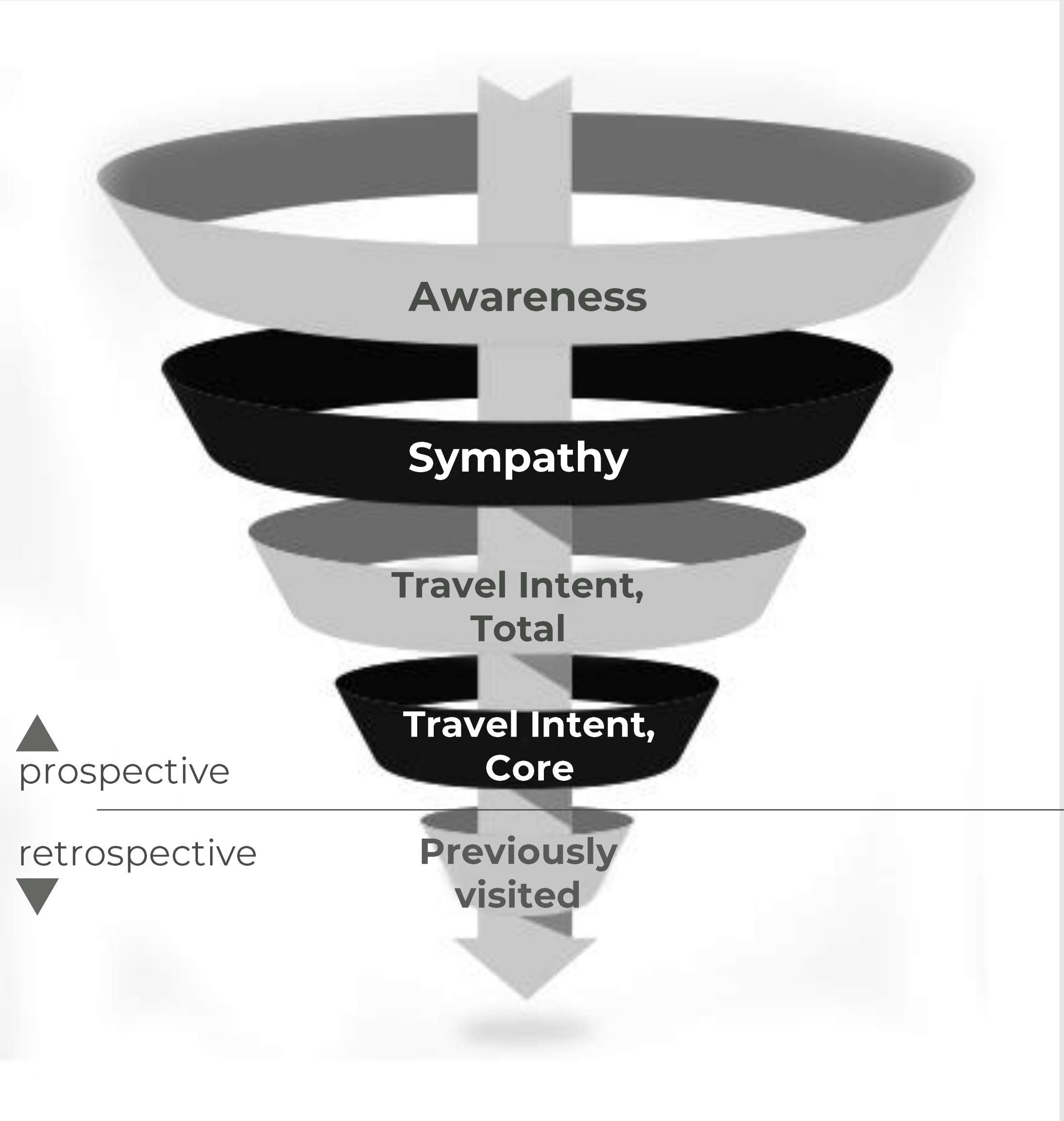


Source: LFT (estimate).

Target segments,
Brand & Growth Potential

Destination Luxembourg - Brand Funnel 2024

Assessing Luxembourg's **brand strength** as a destination

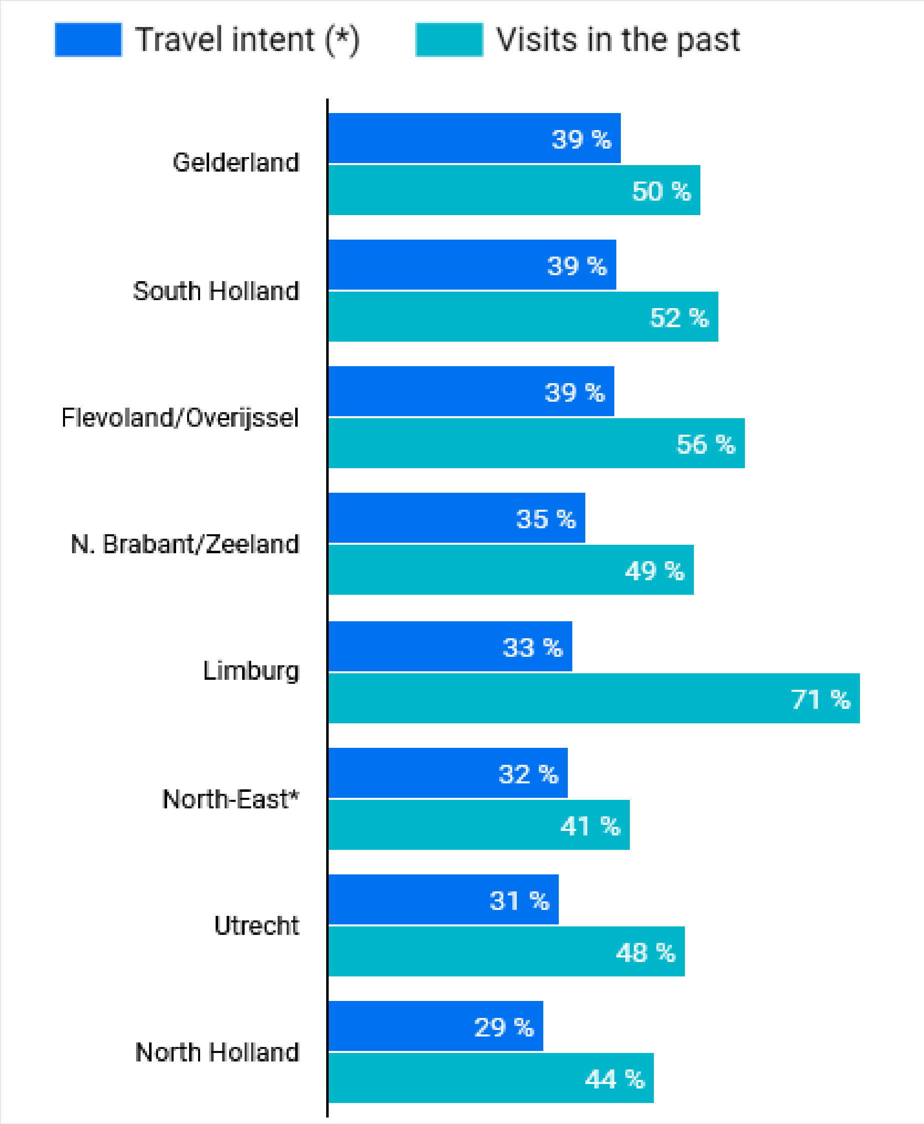


Awareness	82%		82%	
		77%		67%
Sympathy	63%		55%	
		56%		62%
Travel Intent, Total	35%	27%	34%	27%
Travel Intent, Core	17%		15%	
Previously visited	50%		20%	

Source: LFT Brand & Potential Study 2023-2024,
except data for PL: Destination Brand/Inspektour (2021).

Regional origin 2024

Past visitors and future potential



Source: LFT Brand & Potential Study, 2024.

General theme interest (*)

Theme	Europe	Netherlands	Netherlands
	Rank	**Rank**	% interested
Resting/Relaxation	1	**1**	70%
Nature	3	**2**	68%
Culinary	2	**3**	68%
Sightseeing	4	**4**	66%
Architecture/townscapes	7	**5**	63%
City	5	**6**	62%
Fun/entertainment	8	**7**	62%
Family	12	**8**	62%
Hiking	17	**9**	61%
Immersive travel	6	**10**	61%
Castles	9	**11**	58%
Culture	11	**12**	57%
History/Unesco	10	**13**	56%
Adventure/action	19	**14**	54%
Exchanging with locals	13	**15**	54%
Luxury	24	**16**	52%
Learning/new skills	14	**17**	51%
Sustainability	15	**18**	50%
Shopping	23	**19**	49%
Events	16	**20**	48%
Nightlife (**)	20	**21**	48%
Active-sports	27	**22**	47%
Cycling	31	**23**	47%
Countryside	22	**24**	46%
Wine	21	**25**	46%
Travelling by train	18	**26**	46%
Remembrance	26	**27**	45%
Camping	29	**28**	45%
Industrial heritage	28	**29**	42%
Wellness	25	**30**	41%
Film locations	30	**31**	39%
MTB	32	**32**	35%
Motorcycling	33	**33**	34%

(*) Interest in themes with regard to holiday trips with overnight (regardless of specific destinations).

Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

(**) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters).

Source: LFT Brand & Potential Study, 2024.

Luxembourg's Theme Competence (*)

Theme	Europe	Netherlands	Netherlands
	Rank	**Rank**	% agreeing
Nature	5	**1**	54%
Hiking	11	**2**	52%
Resting/Relaxation	2	**3**	44%
Family	8	**4**	36%
Castles	7	**5**	35%
Camping	19	**6**	32%
Architecture/townscapes	4	**7**	31%
Culinary	3	**8**	30%
City	1	**9**	29%
MTB	25	**10**	28%
Cycling	20	**11**	26%
Active-sports	21	**12**	26%
Culture	6	**13**	22%
Adventure/action	22	**14**	22%
Countryside	17	**15**	22%
Luxury	9	**16**	22%
Fun/entertainment	13	**17**	21%
History/Unesco	12	**18**	21%
Shopping	10	**19**	21%
Wine	15	**20**	19%
Sustainability	18	**21**	16%
Wellness	16	**22**	15%
Nightlife (**)	14	**23**	15%
Remembrance	26	**24**	13%
Industrial heritage	24	**25**	11%
Events	23	**26**	10%

(*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

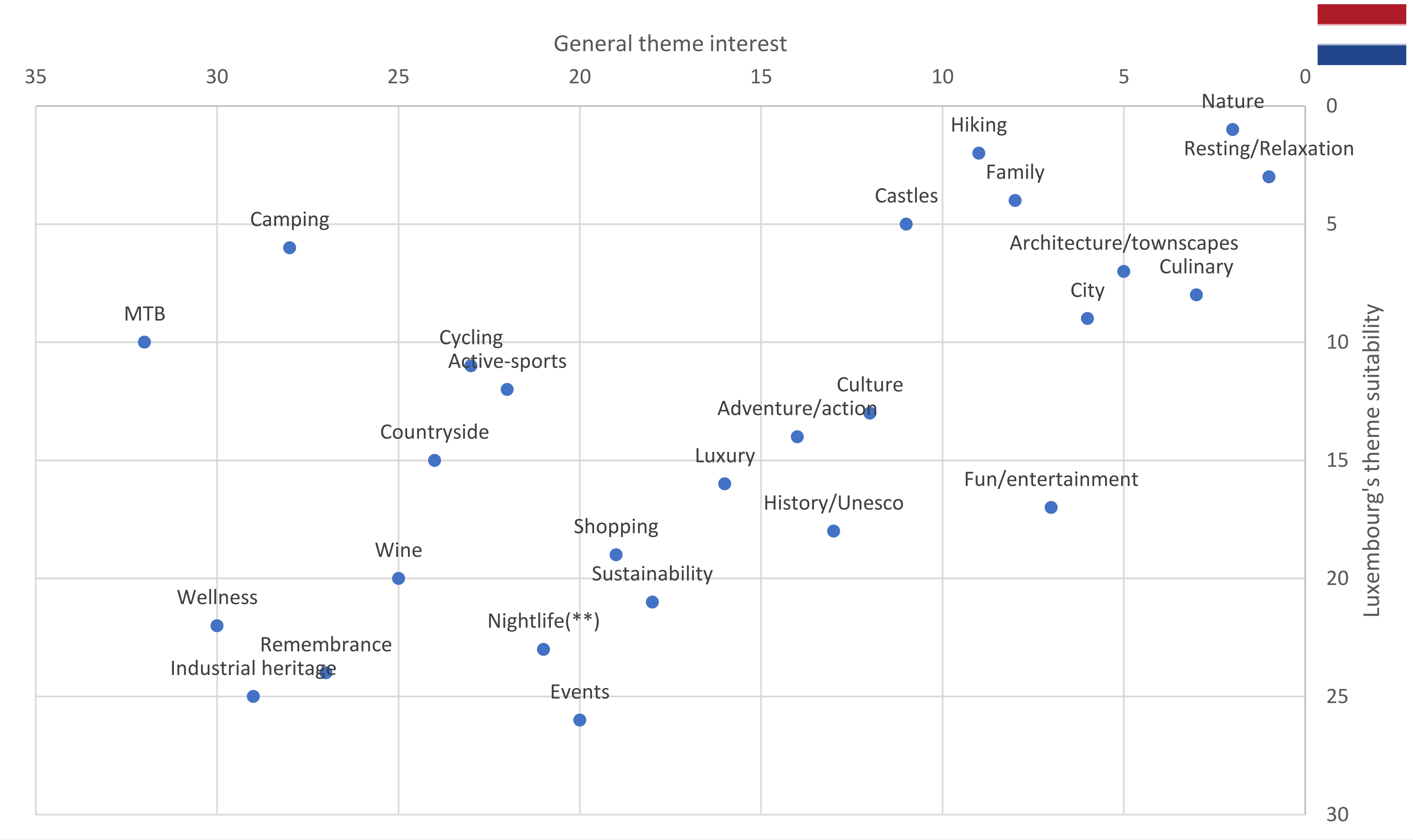
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

(**) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters).

Source: LFT Brand & Potential Study, 2024.

Theme interest & Luxembourg's Theme Competence (*)

Theme ranking by source market interest and Luxembourg's perceived suitability



(*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

(**) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters).

Source: LFT Brand & Potential Study, 2024

Luxembourg’s Brand Value Ratings (*)

Feature			
	Rank	**Rank**	% agreeing
safe	1	**1**	49%
clean	2	**2**	40%
welcoming, hospitable	4	**3**	36%
authentic, real	5	**4**	31%
of high quality	3	**5**	30%
attractive, appealing	7	**6**	29%
open-minded, tolerant, international	6	**7**	25%
surprising	11	**8**	25%
service oriented	10	**9**	24%
affordable	16	**10**	22%
varied, diversified	12	**11**	21%
exclusive, luxurious	8	**12**	19%
not overcrowded / insider tip	14	**13**	18%
lively, trendy	13	**14**	17%
dynamic, modern	9	**15**	17%
sustainable	15	**16**	15%

(*) Brand feature associated with destination Luxembourg,
% of respondents agreeing.

Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-IE-DK-SE-PT.

Source: LFT Brand & Potential Study, 2024.

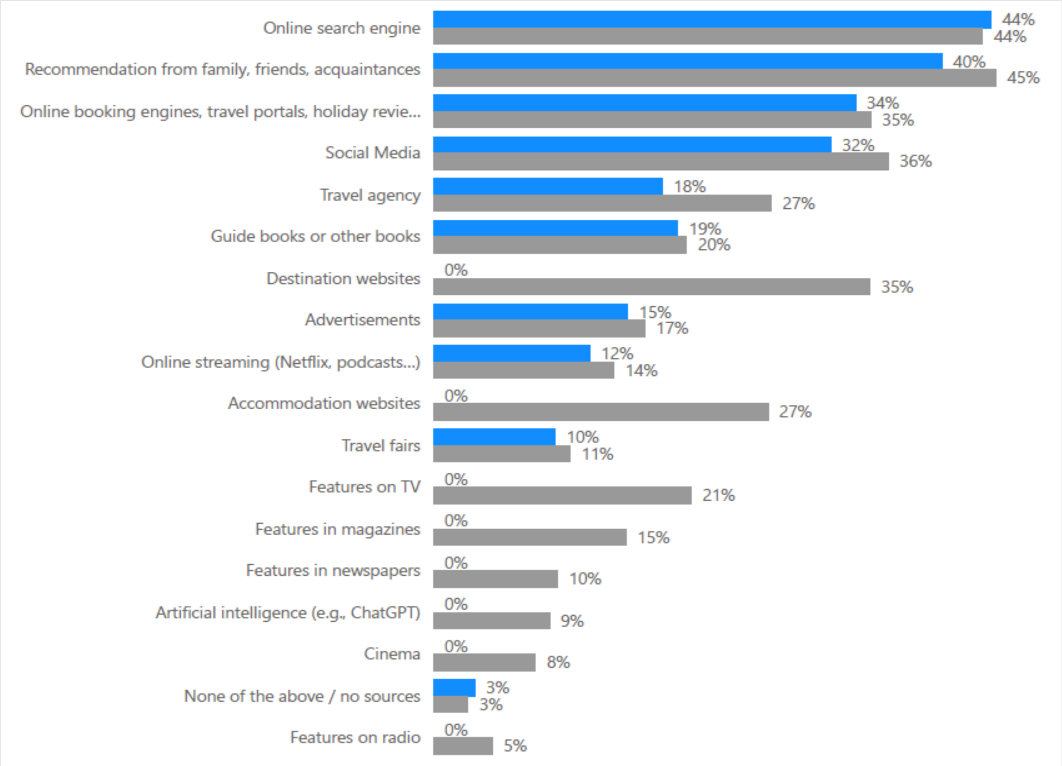
Spontaneous associations with Luxembourg

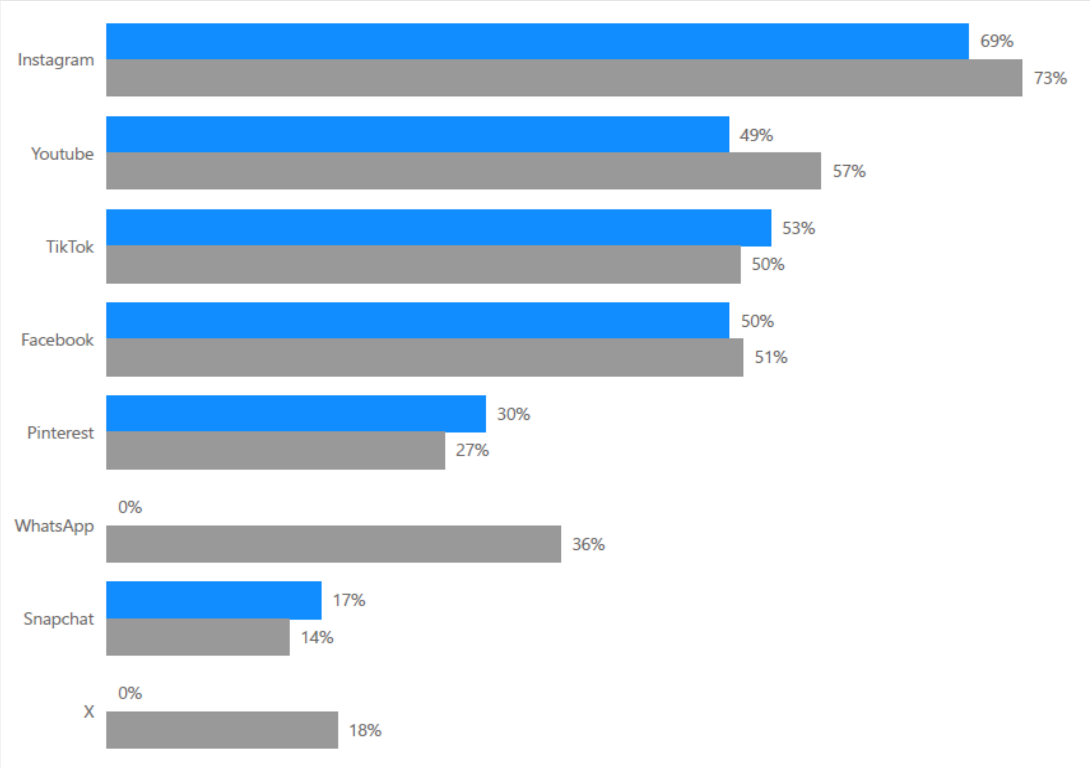
Trip organisation and preferences (1)

— Average **European source markets**, total vs. Netherlands

Netherlands
All inbound

Preferred sources of travel inspiration





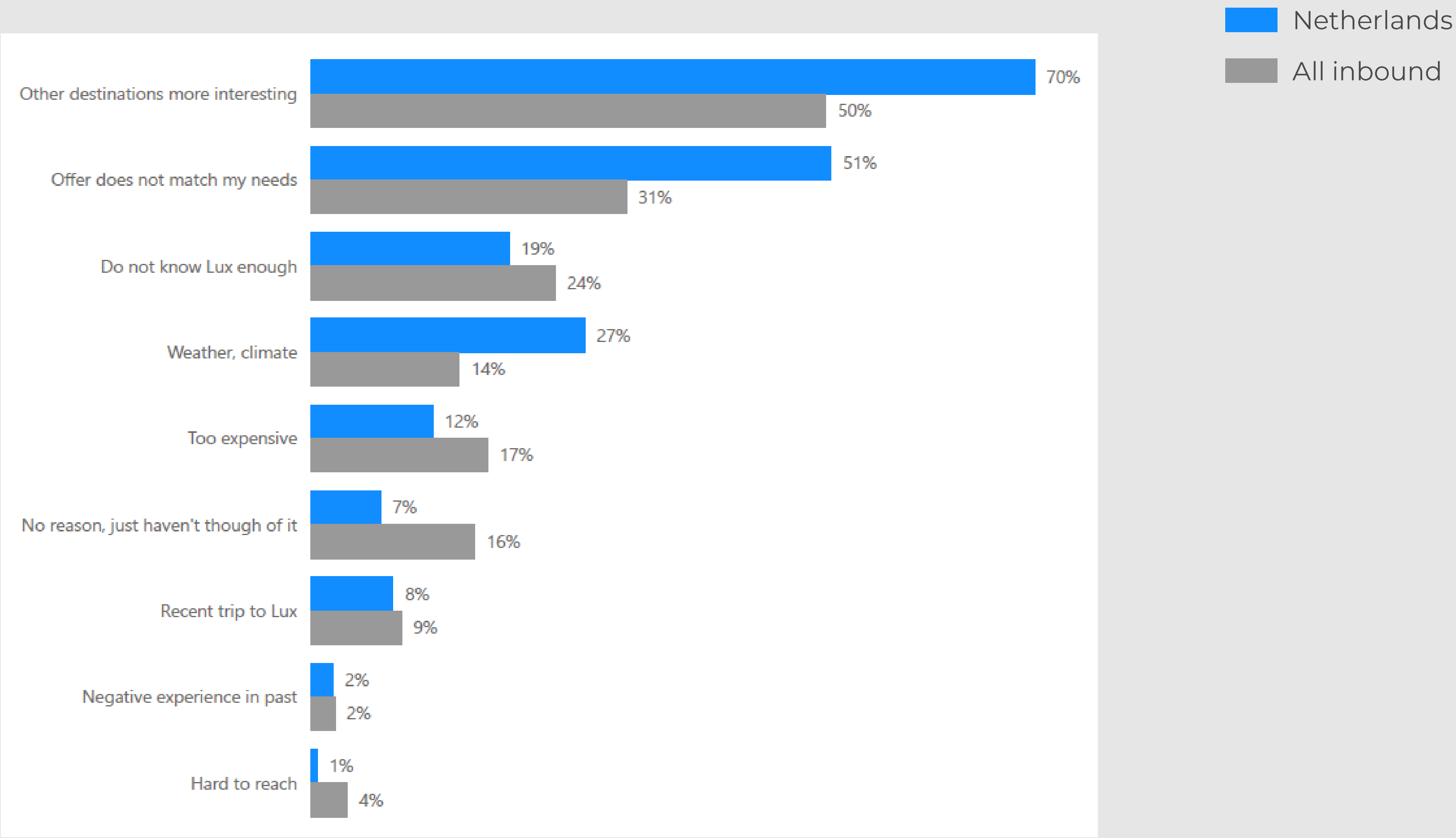
Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent to Luxembourg)

Source: LFT Brand & Potential Study, 2024.

Trip organisation and preferences (2)

— Average **European source markets**, total vs. Netherlands

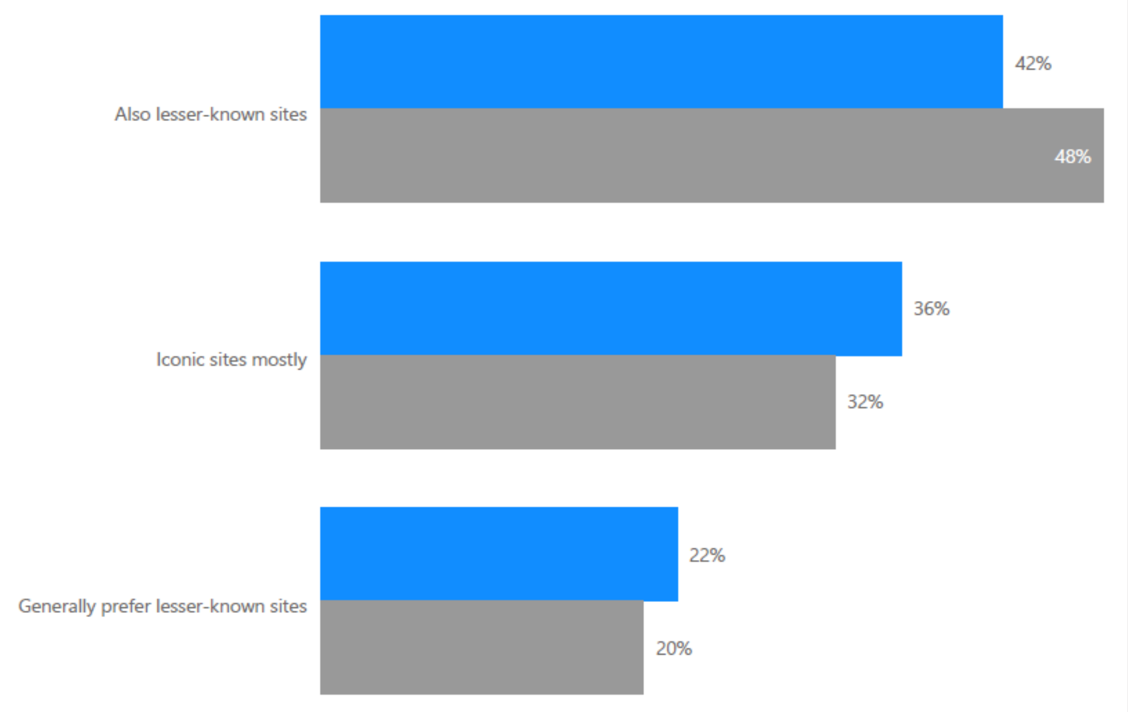
Reasons for not considering Luxembourg as a destination



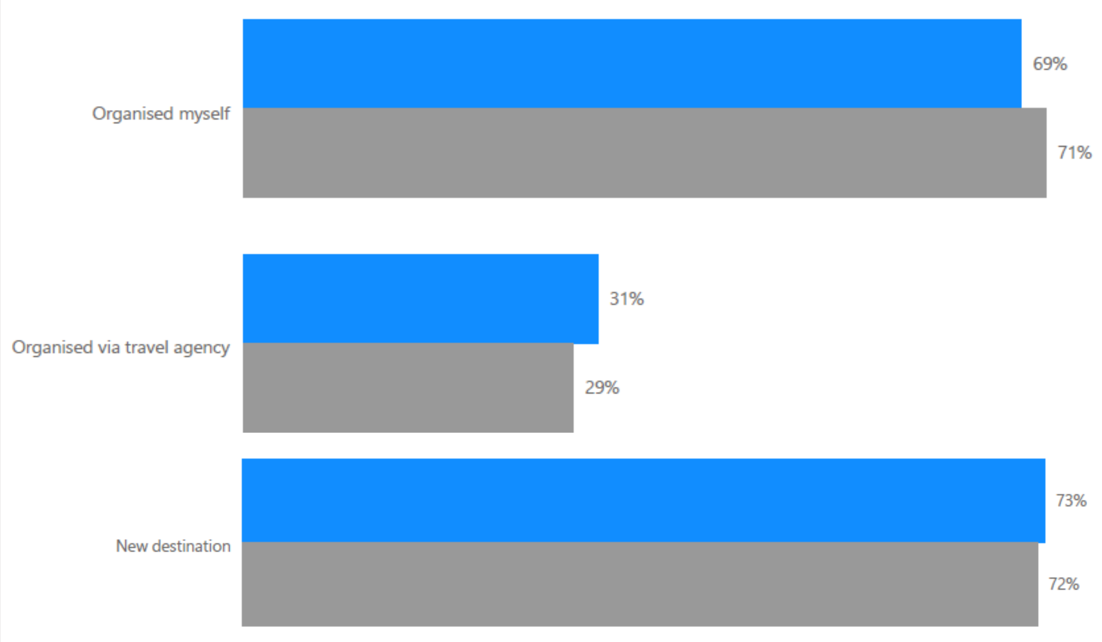
Trip organisation and preference (3)

— Average **European source markets**, total vs. Netherlands

General preference for visiting iconic vs. lesser-known sites



Self-organisation (*), new destination (**)



Netherlands

All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.

Your contact

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