

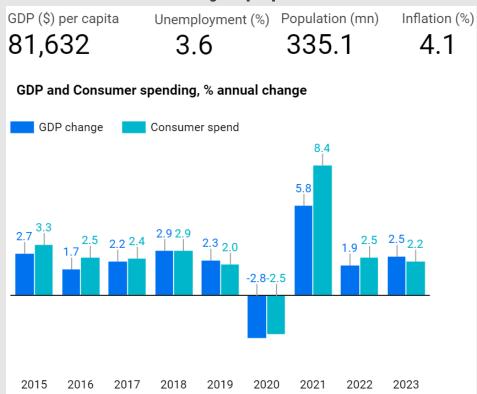


Economic indicators & General Travel Demand

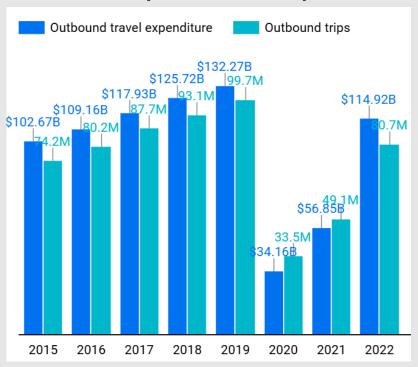
Economic indicators - General travel demand



Economy & population



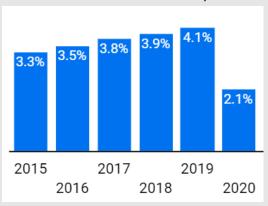
Outbound trips and travel expenditure



Average spend per outbound trip (2022)
1.424 \$

Outbound travel intensity
0.24 trips
per inhabitant (2022)

Share of outbound travel, % all trips



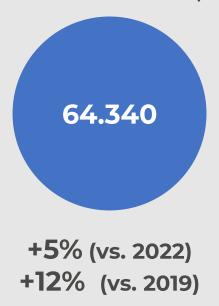


Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2023



Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



Average length of stay, paid accommodation, 2023



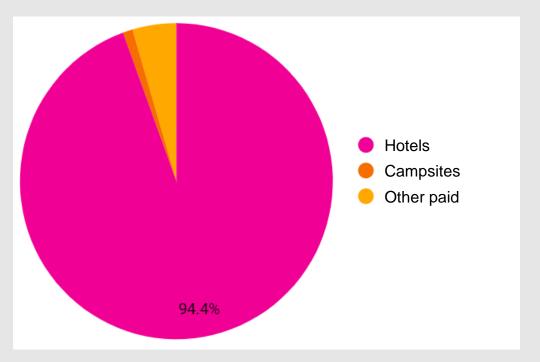
-0.09 days (vs. 2022) -0.20 days (vs. 2019)

Nights & arrivals in paid accommodation

Type of accommodation, 2023

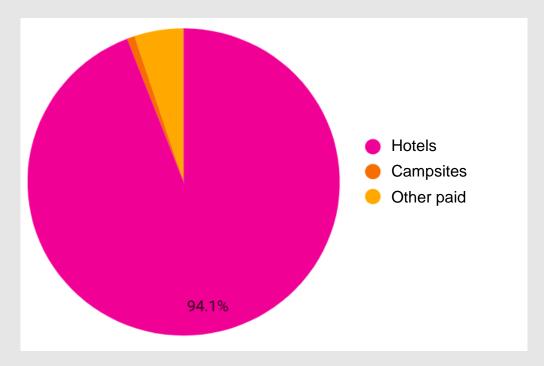


Nights, paid accommodation, 2023



Hotels	60.764	+4% (vs. 2022) +23% (vs. 2019)
Other paid accomm.	2.921	+27% (vs. 2022)-60% (vs. 2019)
Campsites	655	+20% (vs. 2022)+86% (vs. 2019)

Arrivals, paid accommodation, 2023



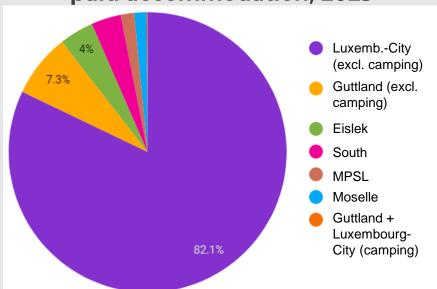
Hotels	60.764	+10% (vs. 2022)+26% (vs. 2019)
Other paid accomm.	1.659	+17% (vs. 2022) -4% (vs. 2019)
Campsites	257	+13% (vs. 2022) +15% (vs. 2019)

Nights & arrivals in paid accommodation

Regions, 2023

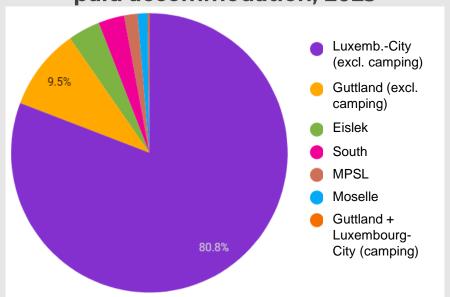


Nights, paid accommodation, 2023



LuxCity (excl. camping)	52.823	+14% (vs. 2022)+24% (vs. 2019)	
Guttland (excl. camping)	4.715	-37% (vs. 2022) -7% (vs. 2019)	
Eislek	2.569	+27% (vs. 2022)-13% (vs. 2019)	
South	2.222	-45% (vs. 2022)-45% (vs. 2019)	
MPSL	1.009	+ 76 % (vs. 2022)+ 8 % (vs. 2019)	
Moselle	917	+48% (vs. 2022) -46% (vs. 2019)	
Guttland/LuxCity (camping)	85	- 7 % (vs. 2022) - 18 % (vs. 2019)	

Arrivals, paid accommodation, 2023



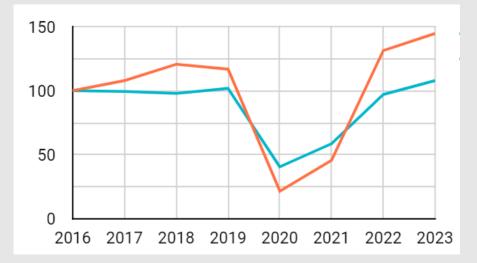
LuxCity (excl. camping)	26.239	+19% (vs. 2022) +37% (vs. 2019)	
Guttland (excl. camping)	3.079	-28% (vs. 2022) +23% (vs. 2019)	
Eislek	1.217	+ 75 % (vs. 2022)- 17 % (vs. 2019)	
South	985	-49% (vs. 2022)-46% (vs. 2019)	
MPSL	511	+107% (vs. 2022)-7% (vs. 2019)	
Moselle	375	+48% (vs. 2022) -46% (vs. 2019)	
Guttland/LuxCity (camping)	69	+26% (vs. 2022)-14% (vs. 2019)	

Arrivals in paid accommodation

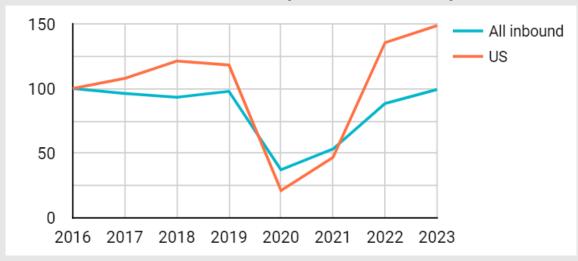
Trends 2016-2023



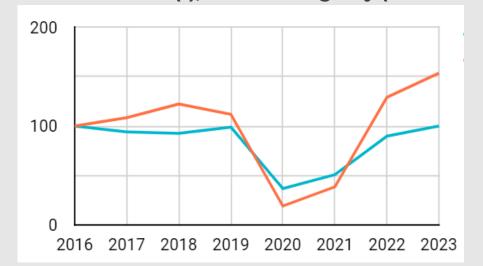
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



All paid accommodation (*), Luxembourg City (2016 = Index 100)

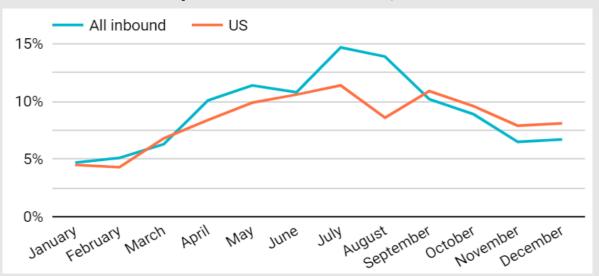


Arrivals in paid accommodation

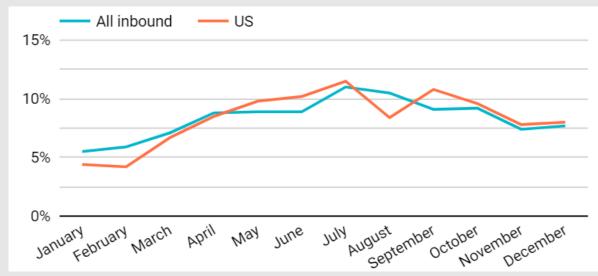
Seasonality



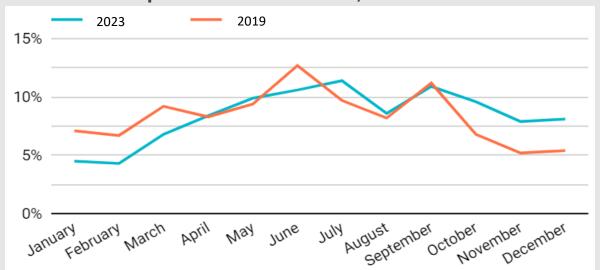




Hotels, 2023



All paid accommodation, arrivals from the US



Short-term rentals

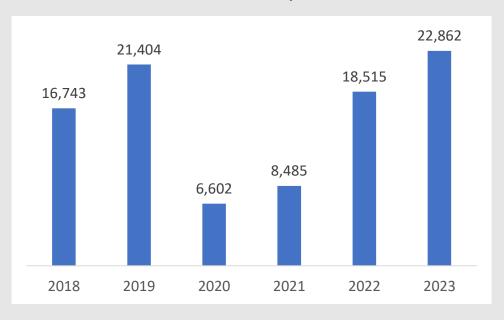


Nights, Short-term rentals, 2023



+23% (vs. 2022) +7% (vs. 2019)

Nights, Short-term rentals, 2018-2023





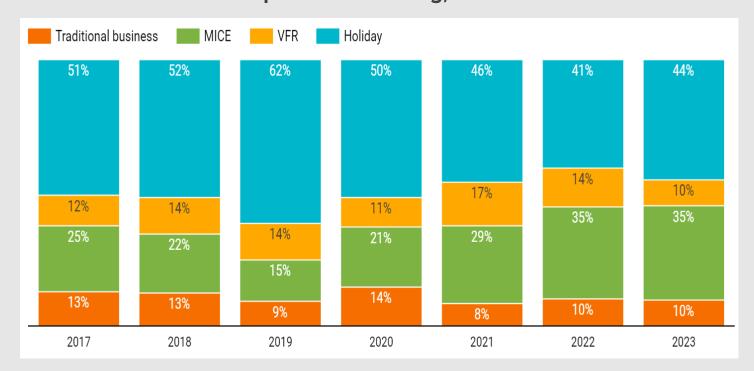
Characteristics of US inbound trips to Luxembourg

US trips to Luxembourg with overnight (all accommodation)





US trips to Luxembourg, 2017-2023



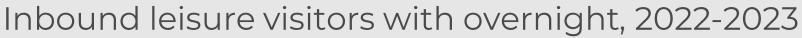
2023

	Luxembourg		
Holiday	44%	56%	
VFR	10%	8%	
MICE	35%	32%	
Traditional Business	10%	5%	



Travel behaviour of US leisure visitors in Luxembourg

Holiday types

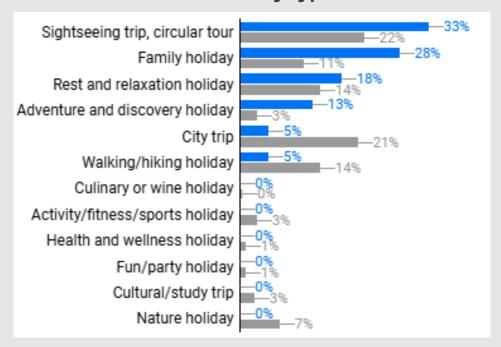




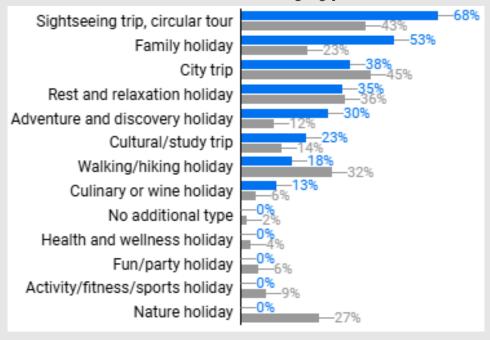
US

All inbound

Main holiday types



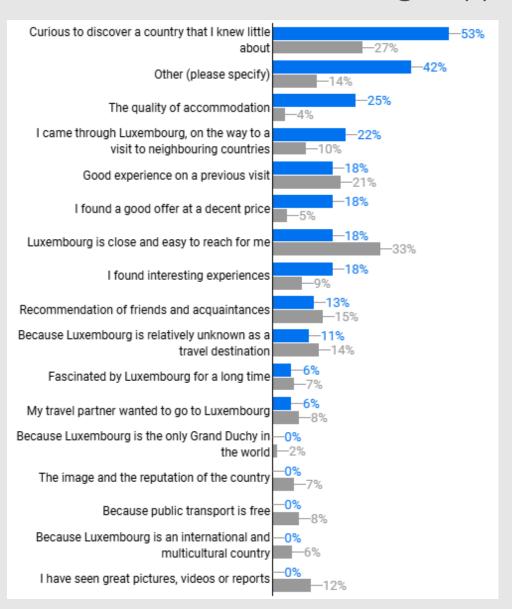
Additional holiday types



Key decision criteria for choosing Luxembourg Inbound leisure visitors with overnight (*), 2022-2023

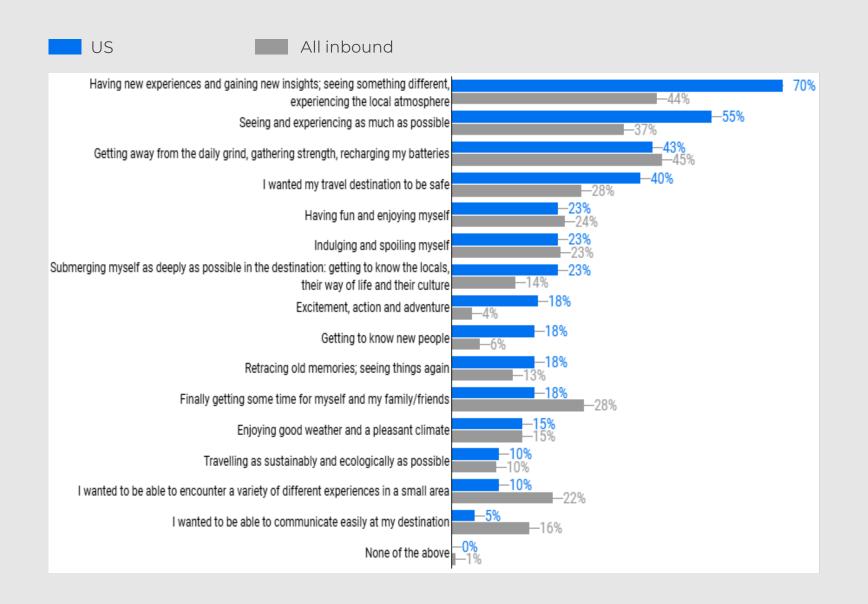






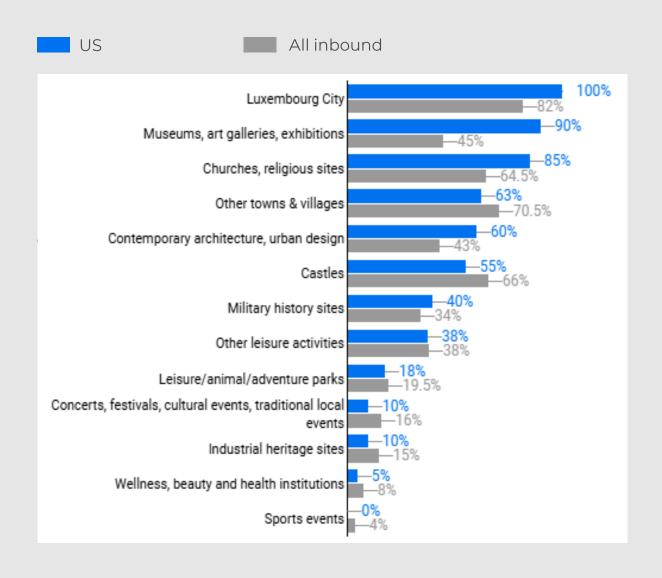
Key travel motivationsInbound leisure visitors with overnight, 2022-2023





Type of places visited in Luxembourg Inbound leisure visitors with overnight, 2022-2023

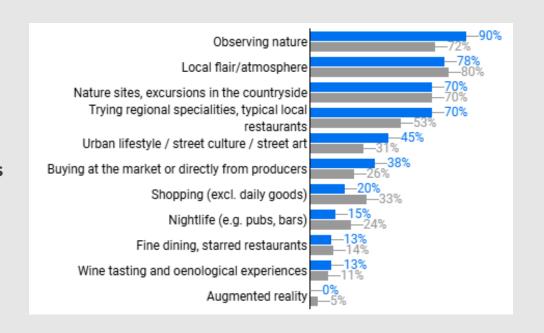




Activities undertaken in Luxembourg Inbound leisure visitors with overnight, 2022-2023



Non-sporting activities



US

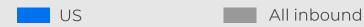
All inbound

Sporting activities



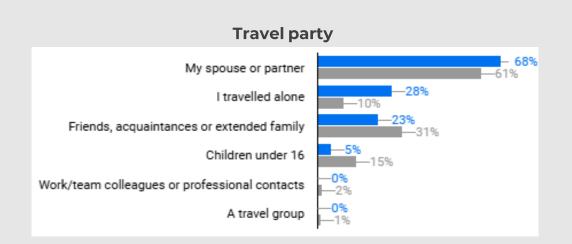
Transport, travel party, age, repeat visits and cross-border trips Inbound leisure visitors with overnight, 2022-2023



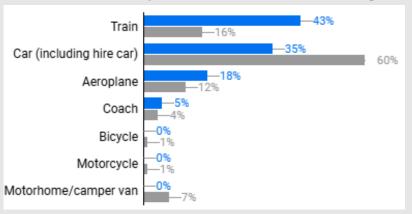


10%0%

Age groups 16-24 35 - 44 55 - 64 Over 75 25 - 34 45 - 54 65 - 74













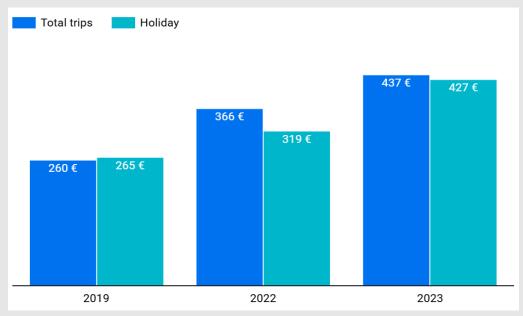


Expenditure

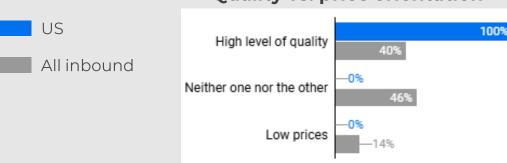
Inbound trips to Luxembourg with overnight



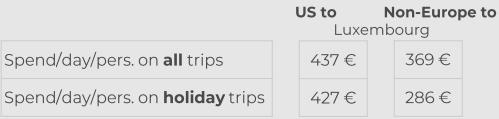
US trips to Luxembourg : average spend per pers. per day



Quality vs. price orientation



2023

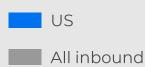


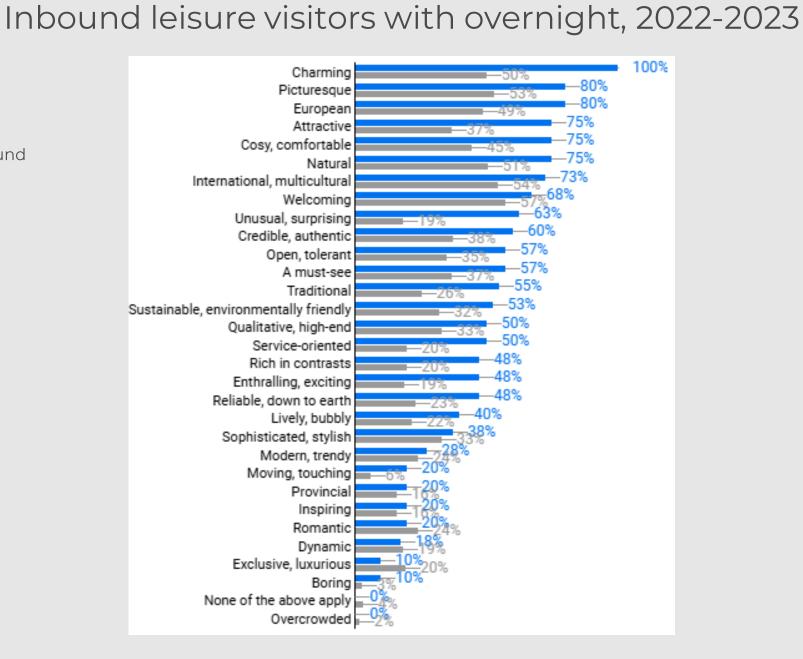
Expenditure of leisure inbound overnight visitors by categories, 2022-2023



Image perception of Luxembourg

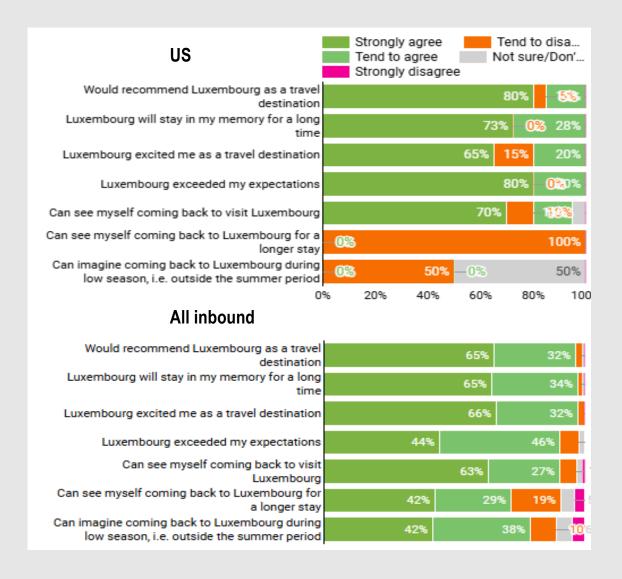






Visitor satisfaction and recommendation Inbound leisure visitors with overnight, 2022-2023





LFT Target Segments



Explorers

Nature-Loving Actives

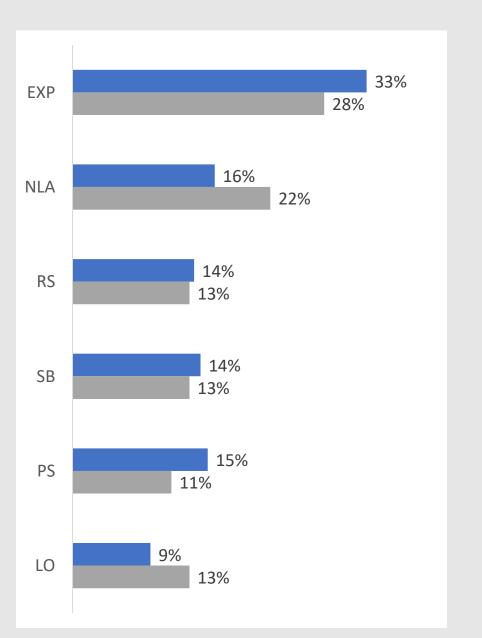
Relaxation Seekers

Short Breakers

Perfection Seekers

Leisure-Oriented







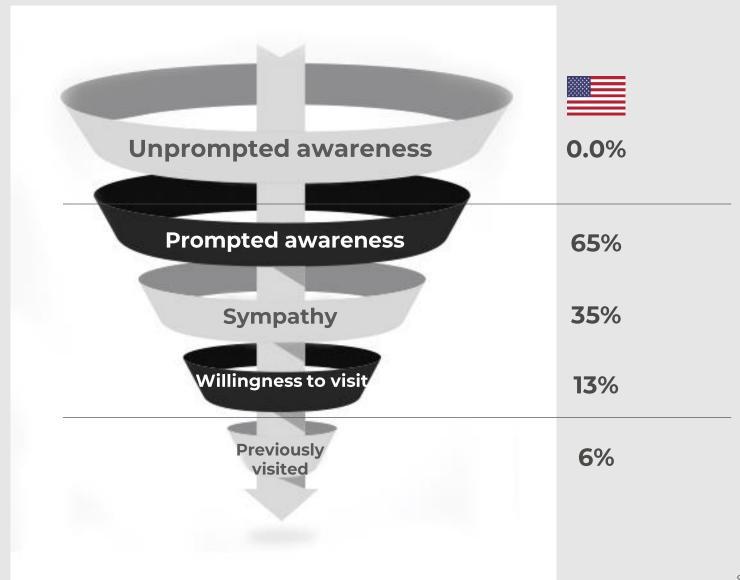


Brand strength & Growth potential

Brand Funnel 2022



Assessing Luxembourg's brand strength as a destination



Growth potential & outbound travel demand trends



US travel to Europe

For long-haul markets, LFT primarily relies on market research carried out by our partners at European Travel Commission (ETC).

For further insights on current demand trends and potential of the US market, we therefore invite you to check:

- The Long-Haul Travel Intent Barometer, covering 7 key source markets including the US
 - ⇒ https://etc-corporate.org/reports/long-haul-travel-barometer-1-2025/

A more detailed report of the US outbound travel market was also released in 2018:

⇒ https://etc-corporate.org/reports/etc-ec-research-snapshot-on-the-us-travel-market/



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