Luxembourg for Tourism

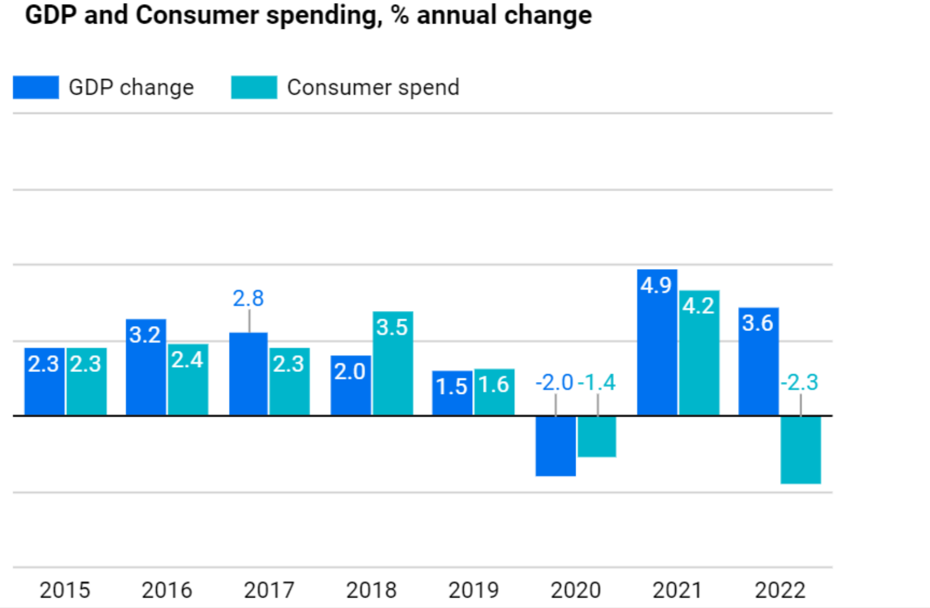
Market profile
DENMARK & SWEDEN
2022

Economic indicators & General Travel Demand

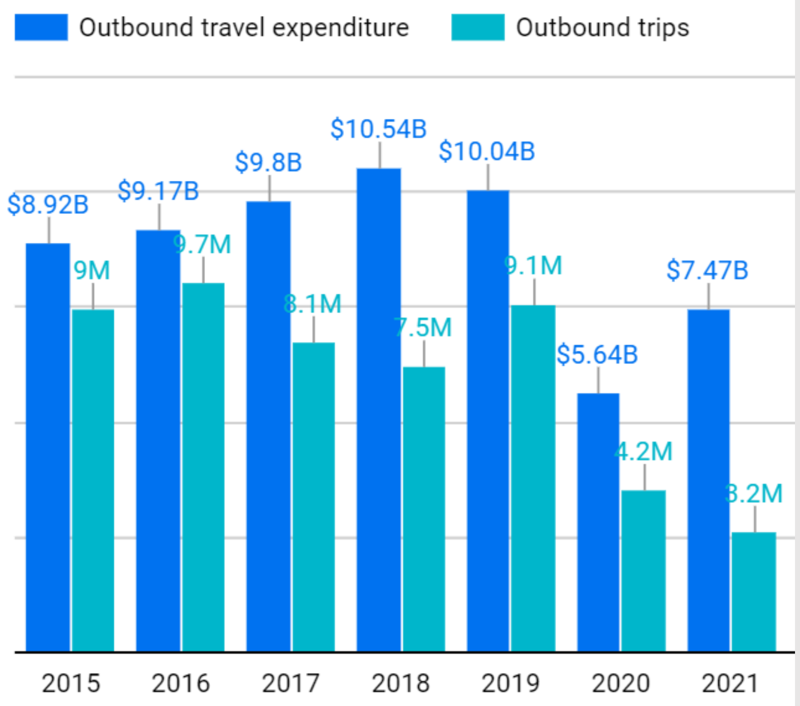
Economic indicators – General travel demand

Economy & population

GDP (PPP) per capita	Unemployment (%)	Population (mn)	Inflation (%)
$59,183	4.8	5.9	7.7



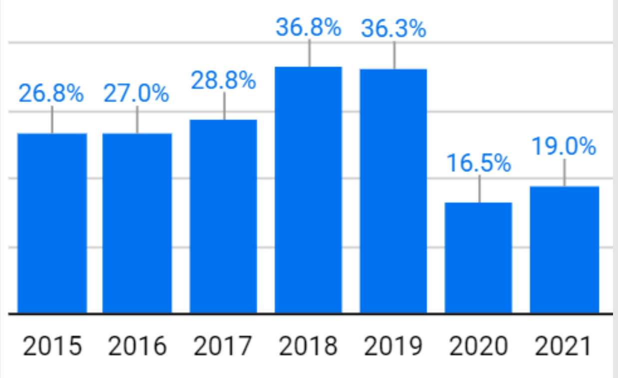
Outbound trips and travel expenditure



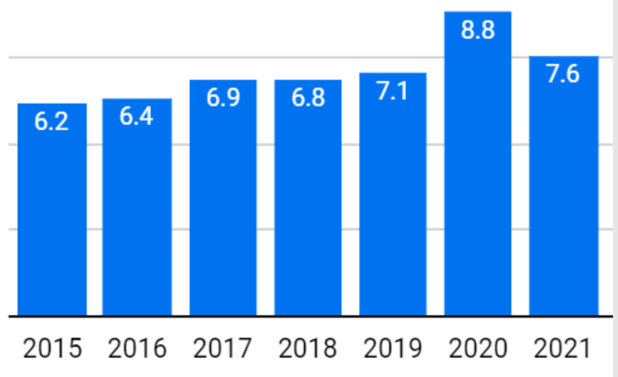
Average spend per outbound trip (2019)
1.104 $

Outbound travel intensity
1.56 trips
per inhabitant (2019)

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of leisure, % all outbound trips (2019)
85.6%

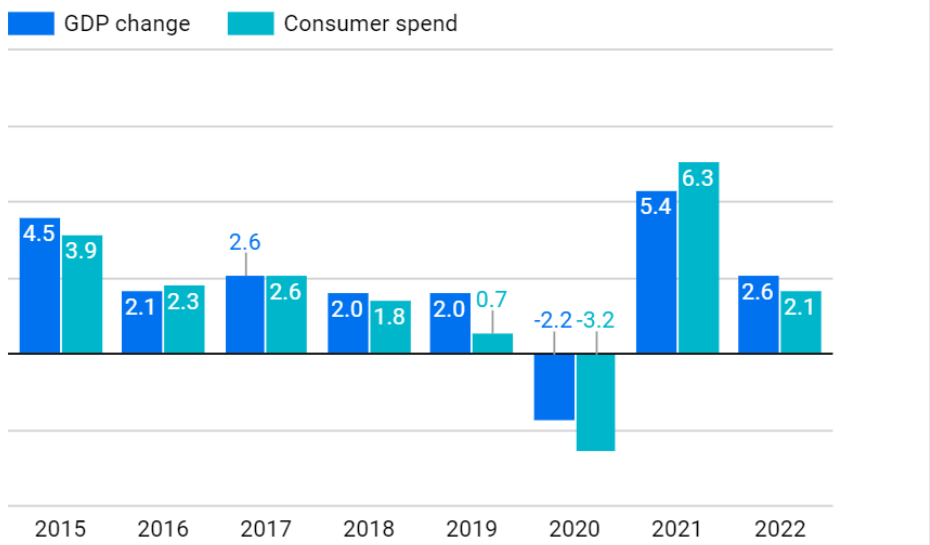
Sources: Eurostat, IMF.

Economic indicators – General travel demand

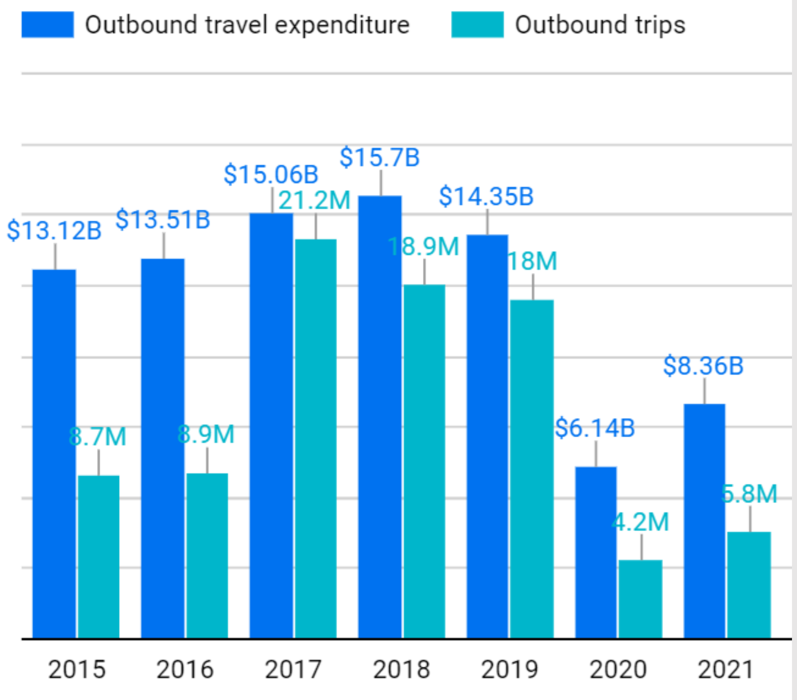
Economy & population

GDP (PPP) per capita	Unemployment (%)	Population (mn)	Inflation (%)
$54,935	8.2	10.5	8.4

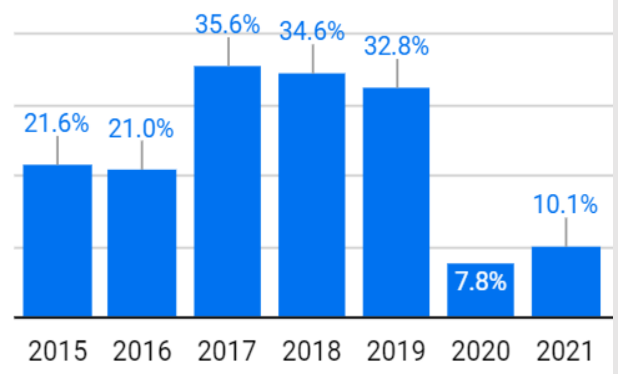
GDP and Consumer spending, % annual change



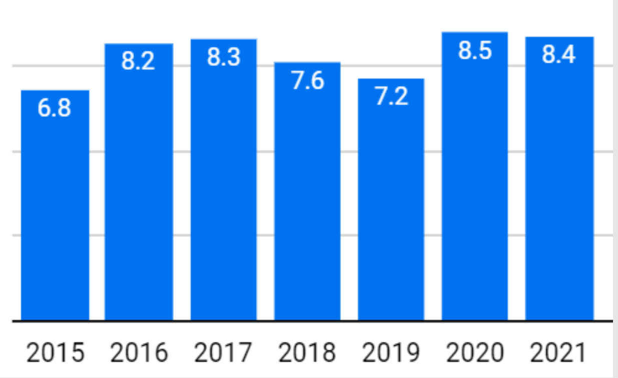
Outbound trips and travel expenditure



Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Average spend per outbound trip (2019)
797 $

Outbound travel intensity
1.74 trips
per inhabitant (2019)

Share of leisure, % all outbound trips (2019)
80.9%

Sources: Eurostat, IMF.

Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation
2022

Nights, paid accommodation, 2022

18.526

+258% (vs. 2021)
+37% (vs. 2019)

Arrivals, paid accommodation, 2022

7.607

+171% (vs. 2021)
+14% (vs. 2019)

Average length of stay, paid accommodation, 2022

2.44 days

+0.60 days (vs. 2021)
+0.43 days (vs. 2019)

Nights, paid accommodation, 2022

11.914

+94% (vs. 2021)
-4% (vs. 2019)

Arrivals, paid accommodation, 2022

6.588

+74% (vs. 2021)
-6% (vs. 2019)

Average length of stay, paid accommodation, 2022

1.81 days

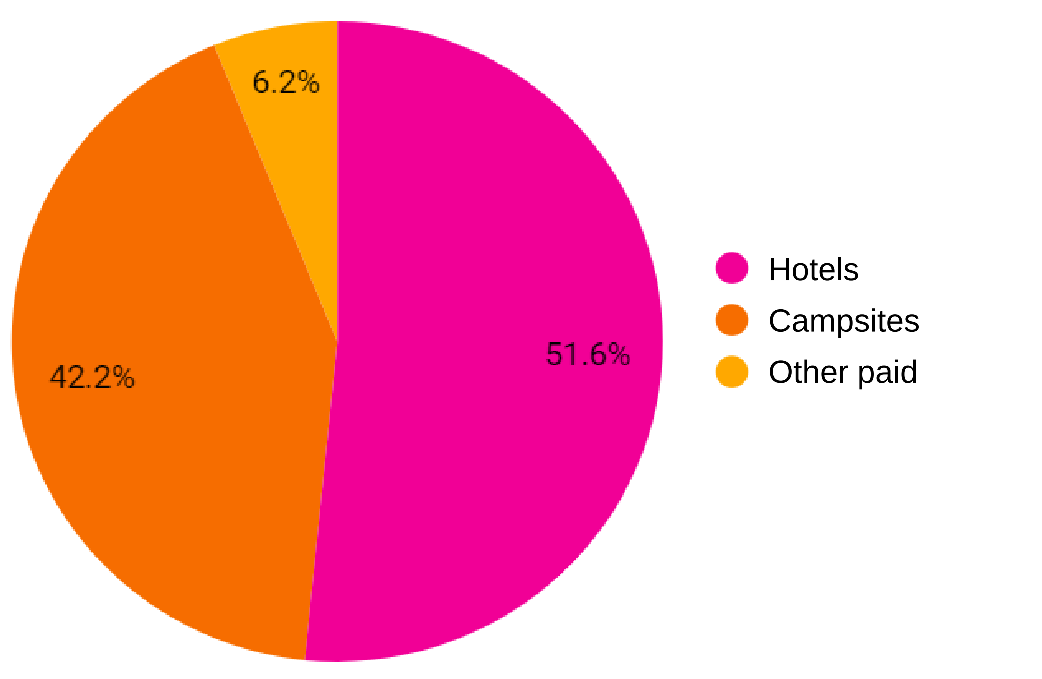
+0.18 days (vs. 2021)
+0.03 days (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

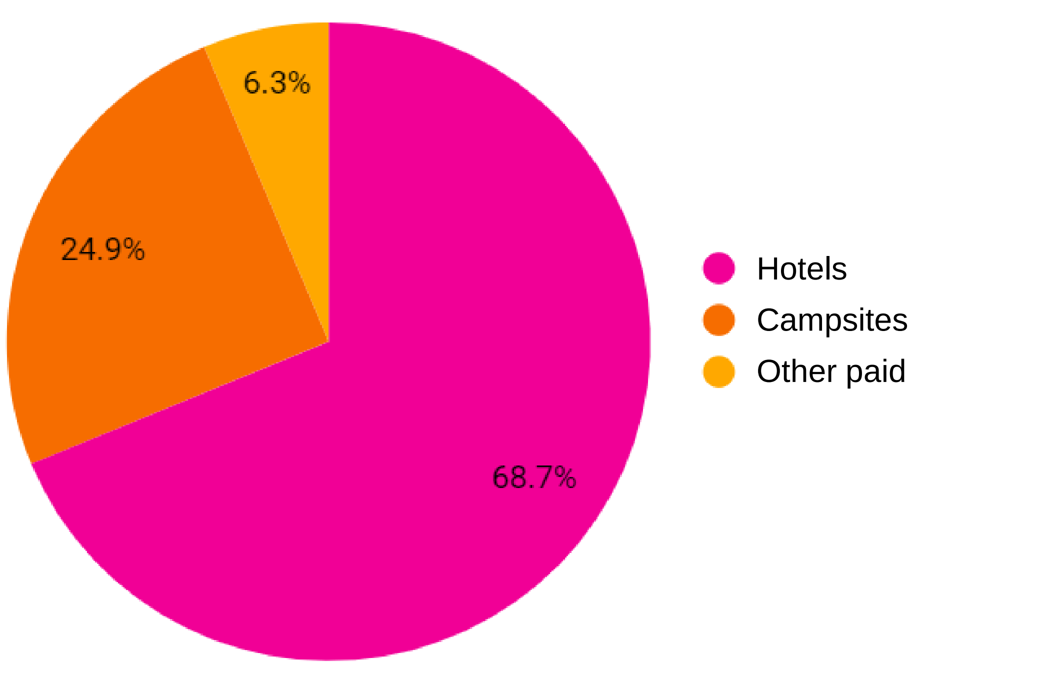
Type of accommodation, 2022

Nights, paid accommodation



Hotels	**9.557**	-4% (vs. 2019)
Campsites	**7.825**	+172% (vs. 2019)
Other paid	**1.144**	+75% (vs. 2019)

Arrivals, paid accommodation



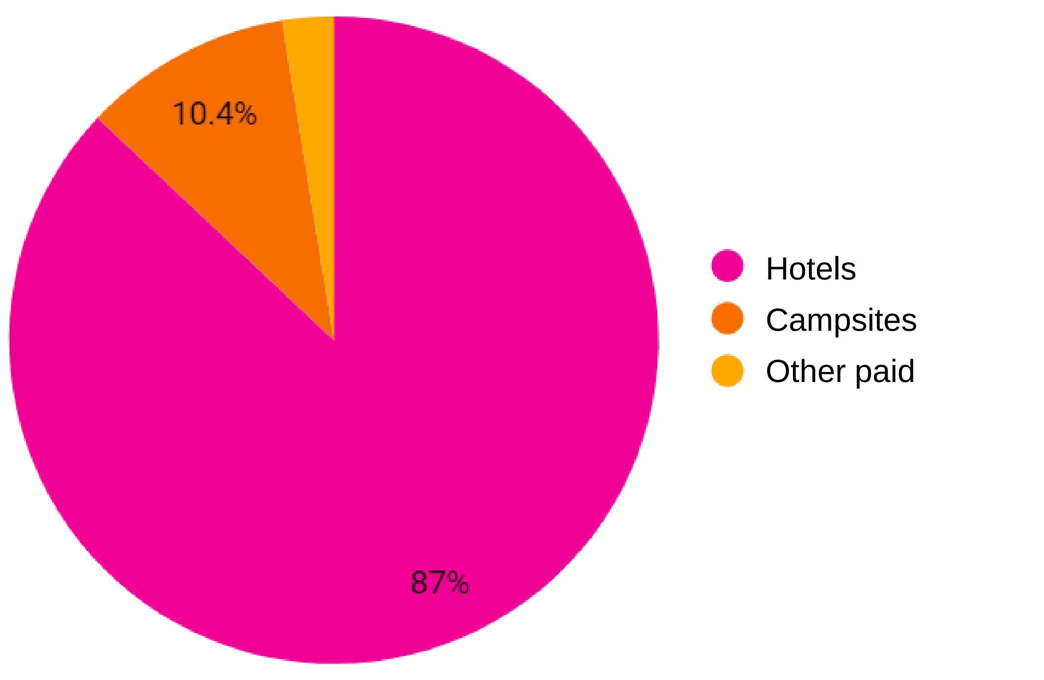
Hotels	**5.229**	-6% (vs. 2019)
Campsites	**1.897**	+121% (vs. 2019)
Other paid	**481**	+72% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

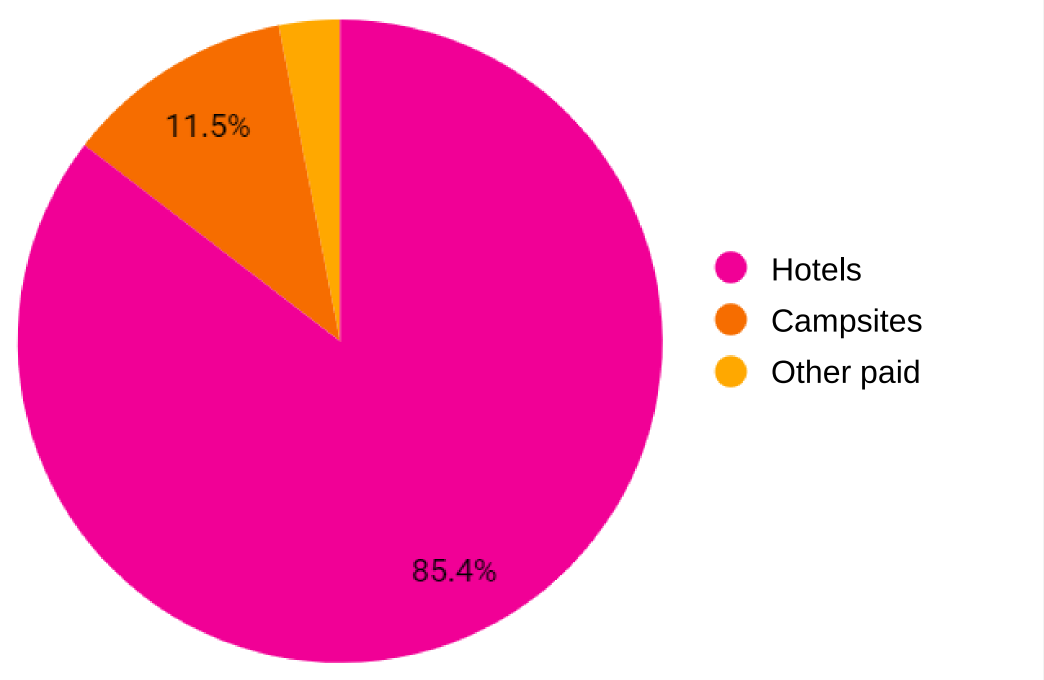
Type of accommodation, 2022

Nights, paid accommodation



Hotels	10.368	-9% (vs. 2019)
Campsites	1.241	+121% (vs. 2019)
Other paid	305	-29% (vs. 2019)

Arrivals, paid accommodation



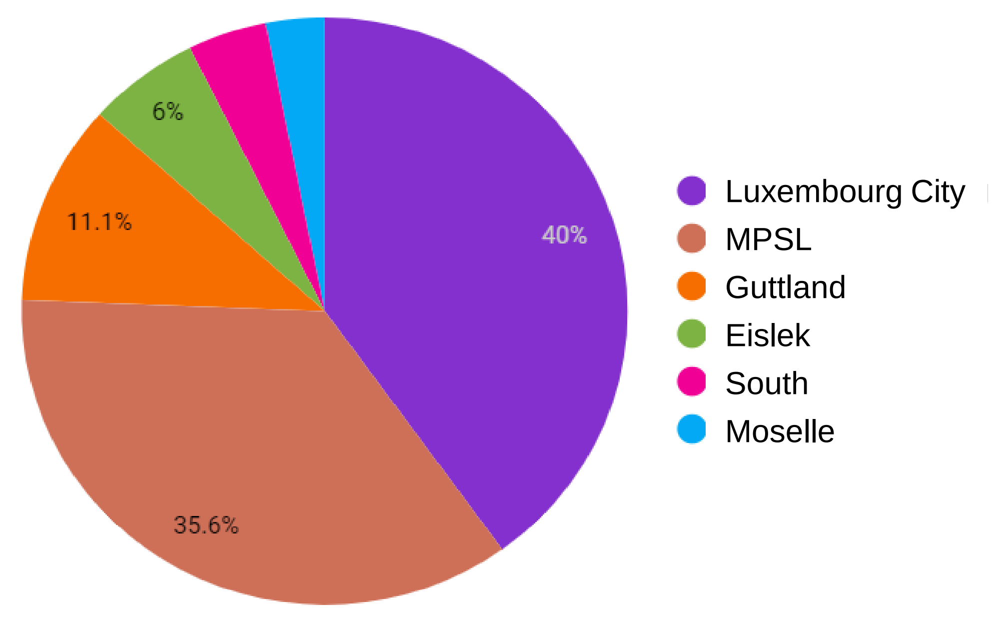
Hotels	5.628	-13% (vs. 2019)
Campsites	759	+166% (vs. 2019)
Other paid	201	-12% (vs. 2019)

Source: Statec

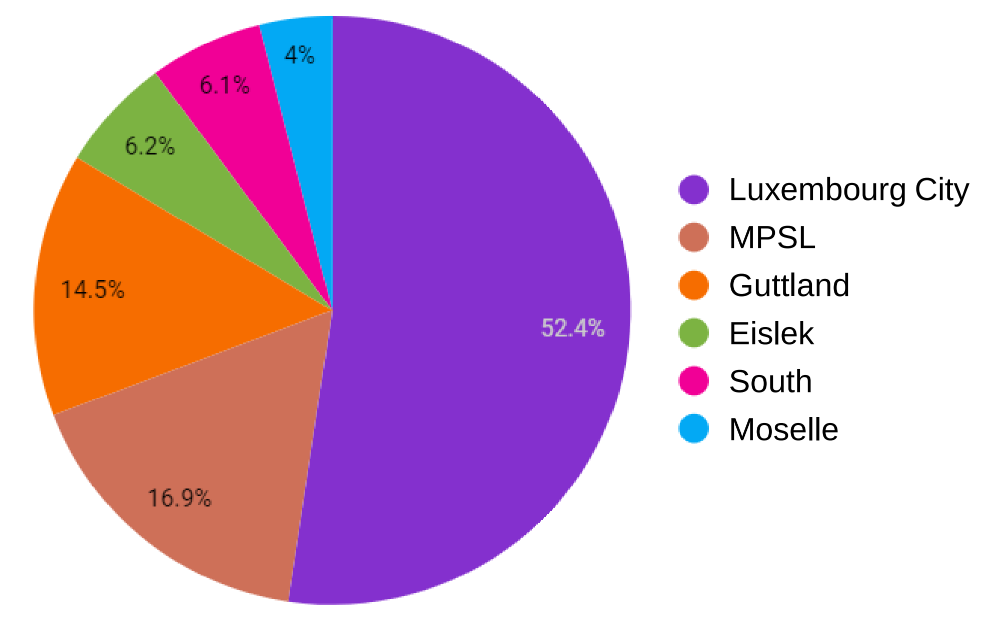
Nights & arrivals in paid accommodation

Regions, 2022

Nights, paid accommodation



Arrivals, paid accommodation



Luxembourg City	7.419	-10% (vs. 2019)
MPSL	6.588	+242% (vs. 2019)
Guttland	2.050	+46% (vs. 2019)
Eislek	1.109	+88% (vs. 2019)
South	778	+11% (vs. 2019)
Moselle	582	-5% (vs. 2019)

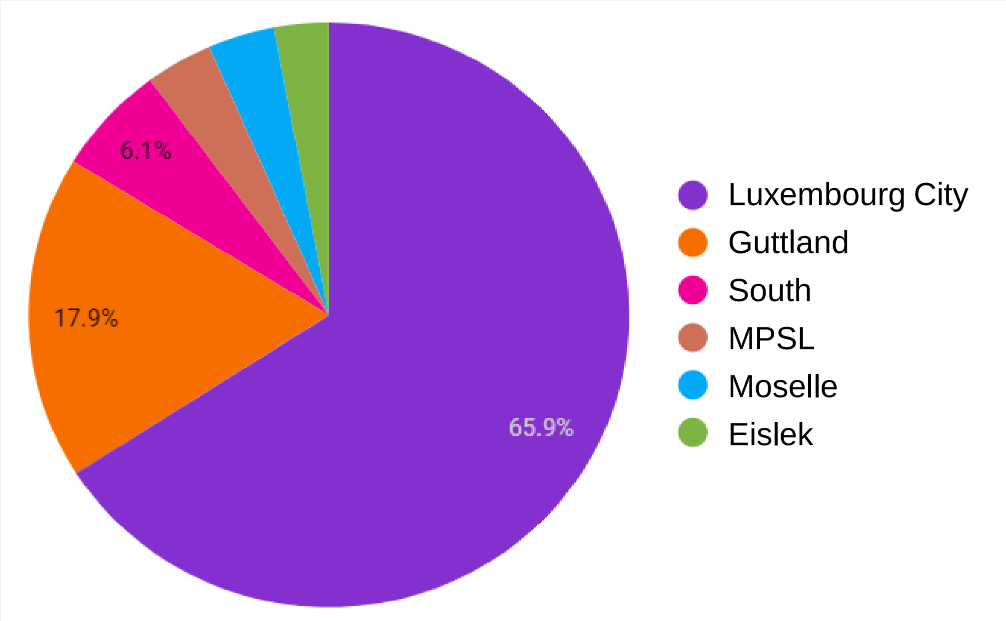
Luxembourg City	3.983	-11% (vs. 2019)
MPSL	1.282	+204% (vs. 2019)
Guttland	1.100	+26% (vs. 2019)
Eislek	474	+130% (vs. 2019)
South	467	+0% (vs. 2019)
Moselle	301	+18% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

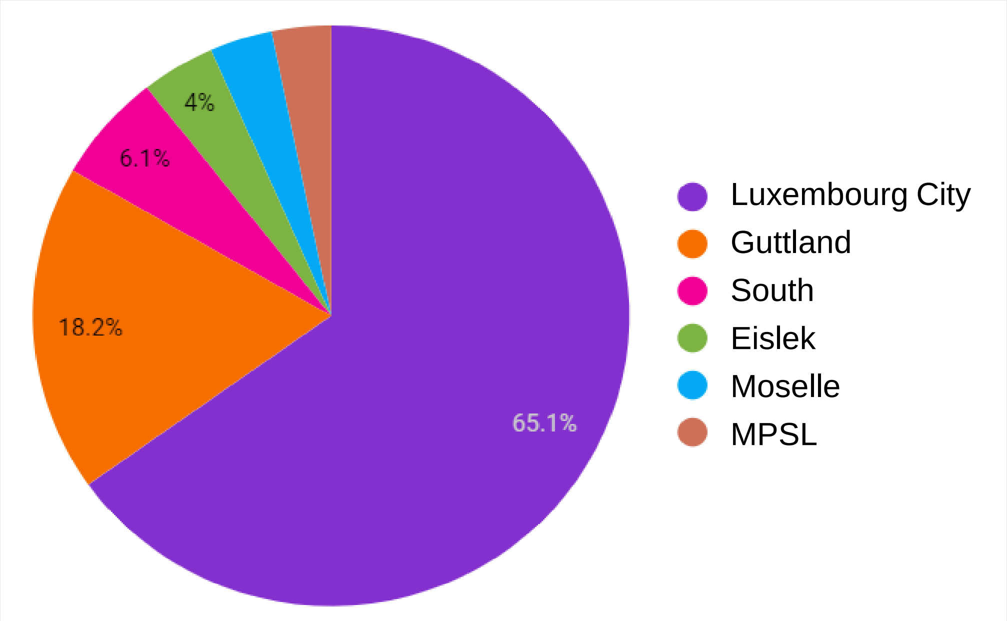
Regions, 2022

Nights, paid accommodation



Luxembourg City	7.851	-14% (vs. 2019)
Guttland	2.133	+80% (vs. 2019)
South	721	+6% (vs. 2019)
MPSL	432	+61% (vs. 2019)
Moselle	427	-52% (vs. 2019)
Eislek	350	+25% (vs. 2019)

Arrivals, paid accommodation



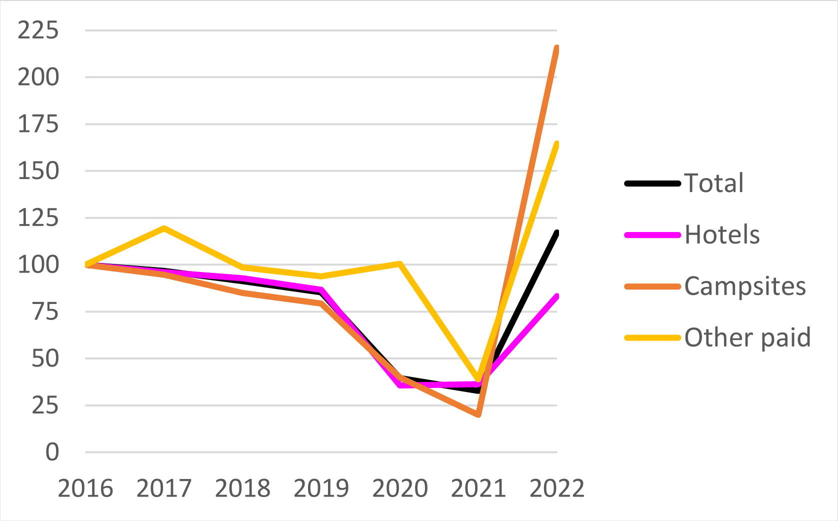
Luxembourg City	4.291	-20% (vs. 2019)
Guttland	1.199	+53% (vs. 2019)
South	399	+25% (vs. 2019)
Eislek	264	+97% (vs. 2019)
Moselle	223	-20% (vs. 2019)
MPSL	212	+56% (vs. 2019)

Source: Statec

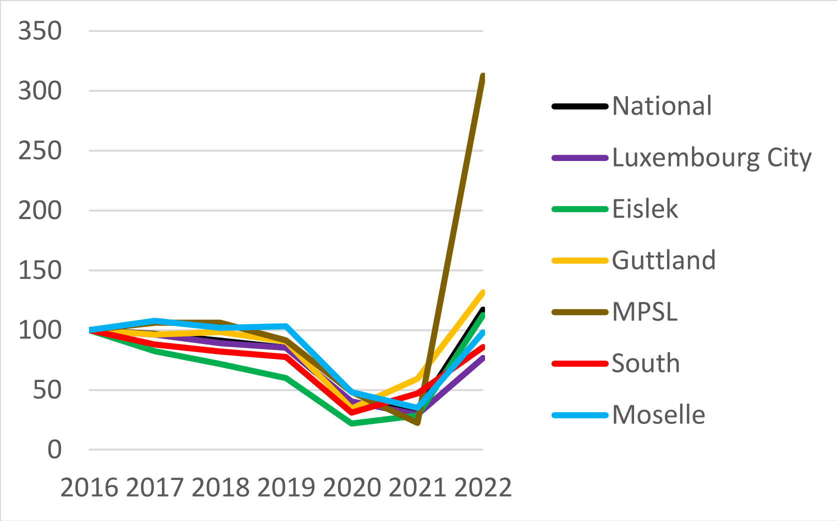
Nights in paid accommodation

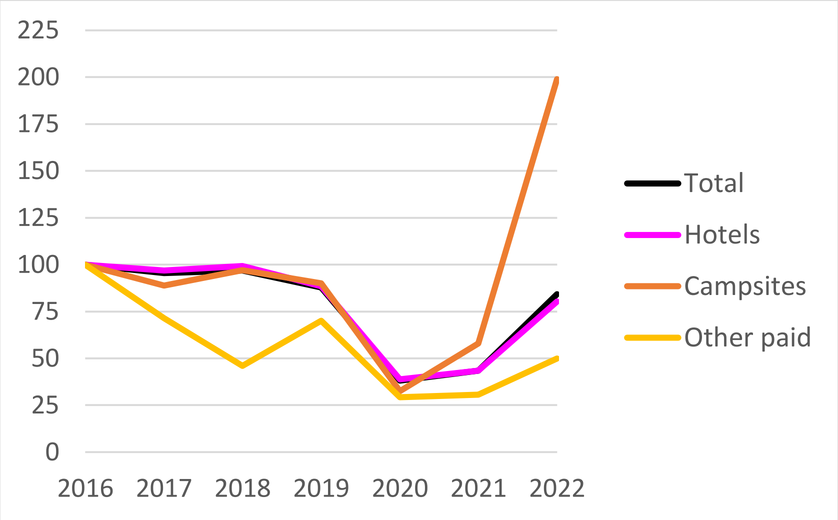
Total, Type of accommodation & Regions : Trends 2016-2022

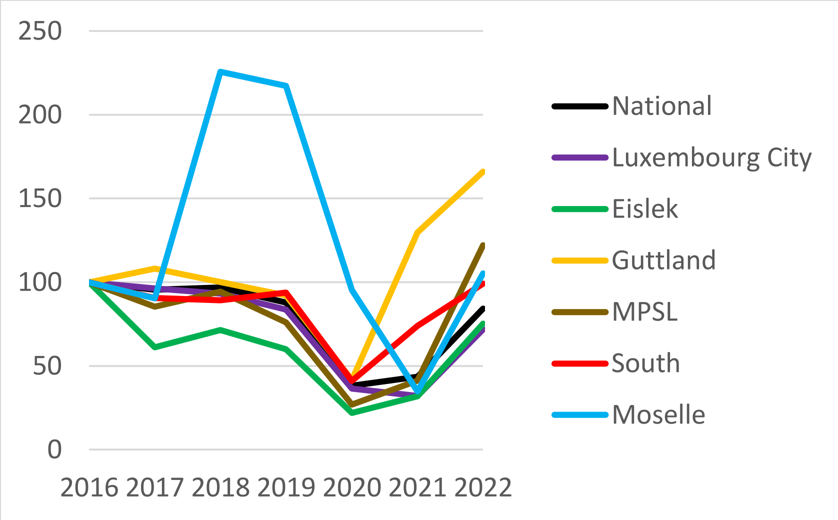
2016 = Index 100



2016 = Index 100







Source: Statec

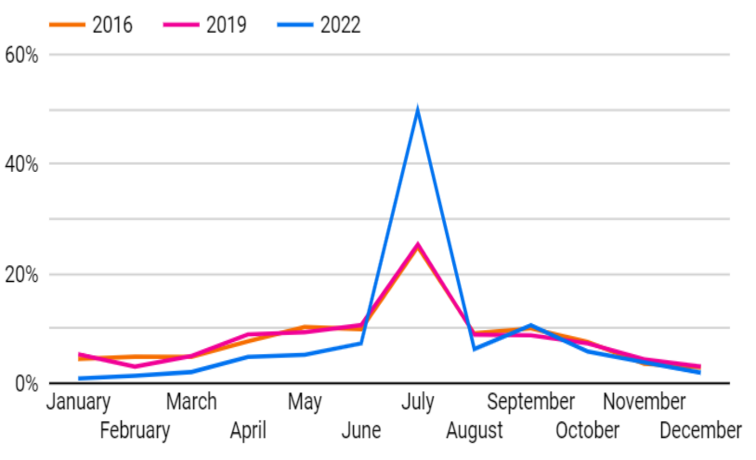
Nights in paid accommodation

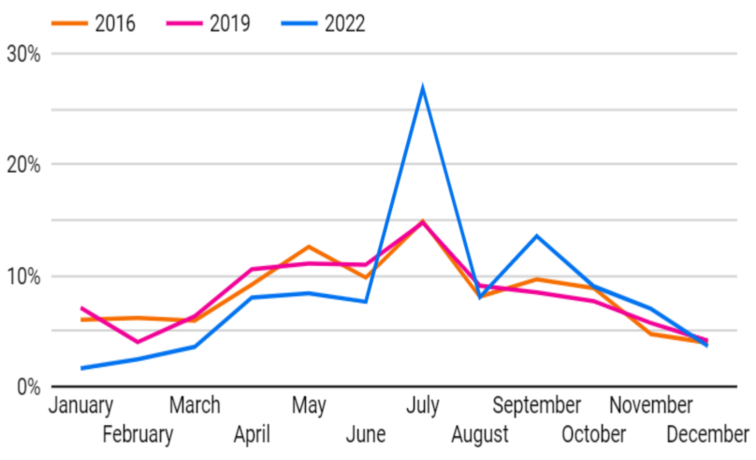
Seasonality

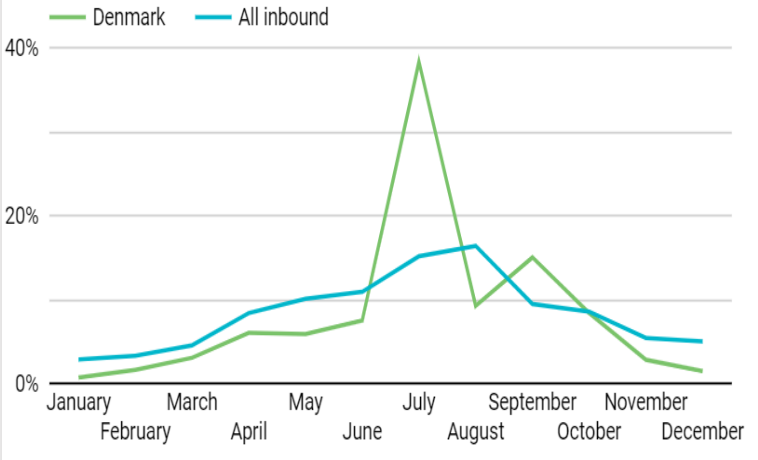
Nights, all paid accommodation

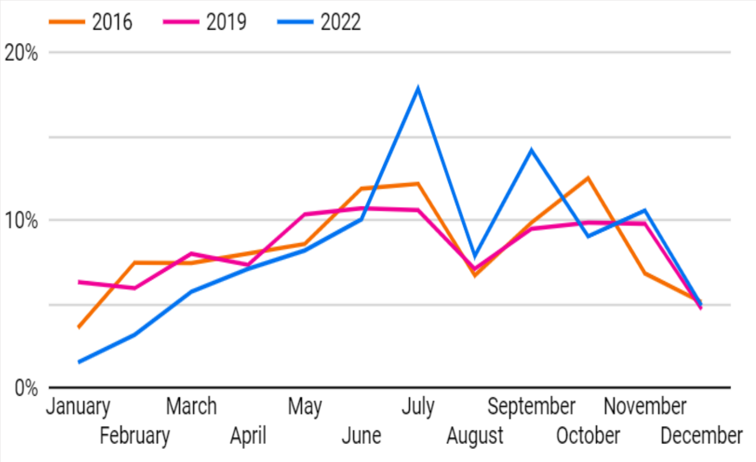
Nights, hotels

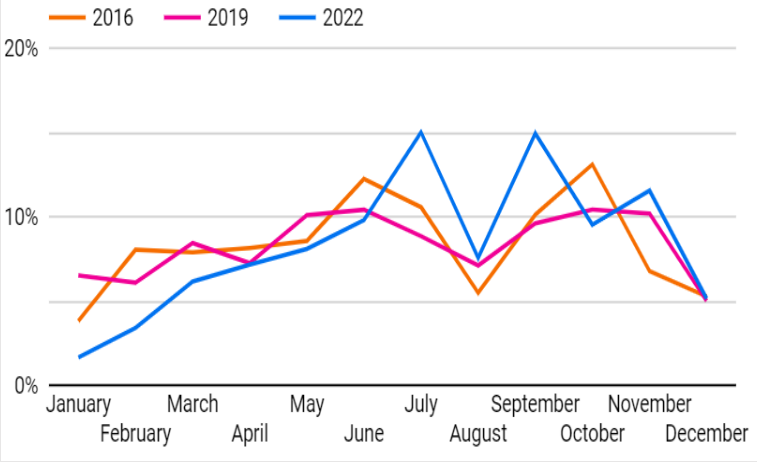
Nights, all paid accommodation, 2022

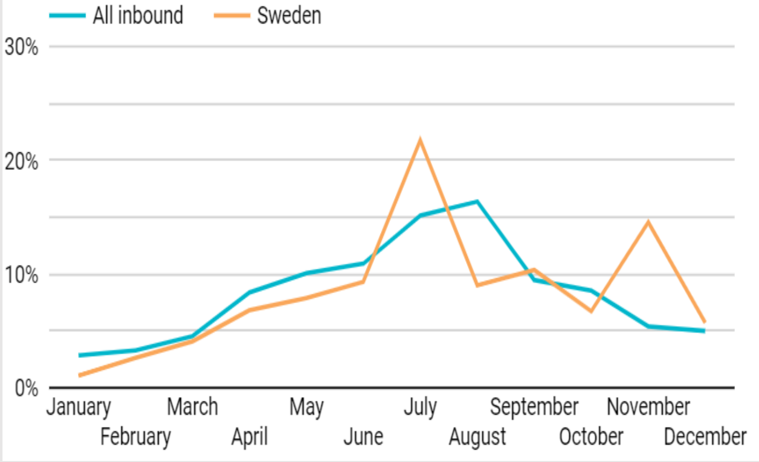










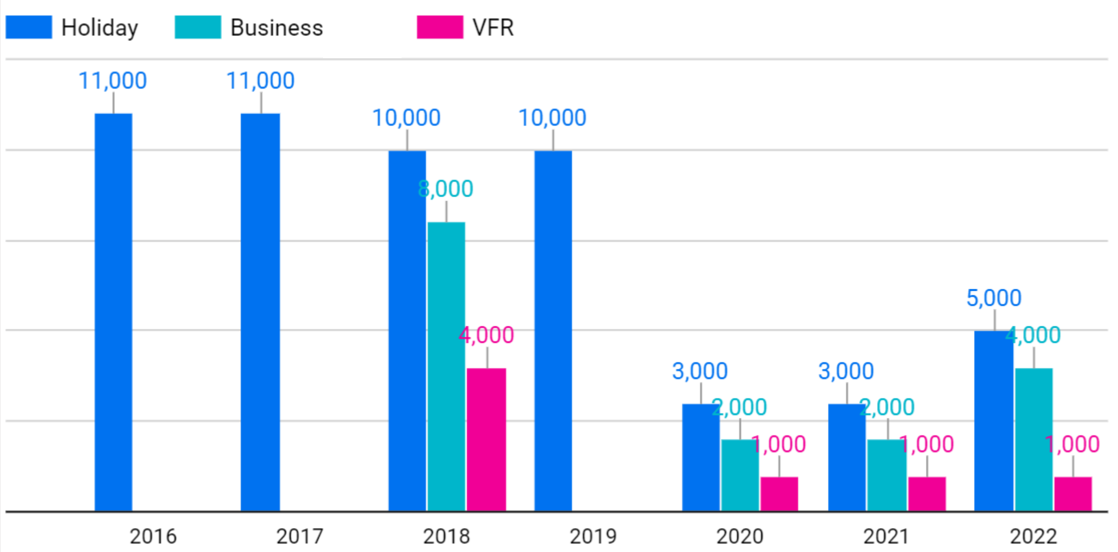


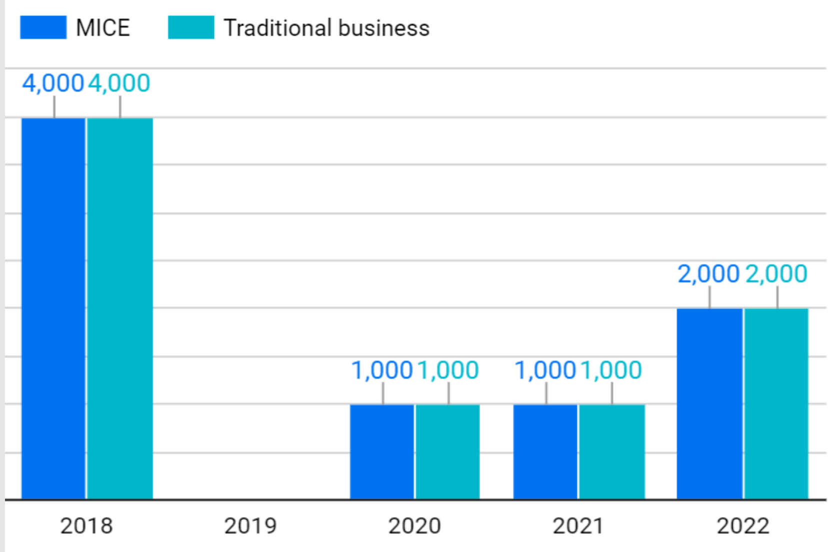
Source: Statec

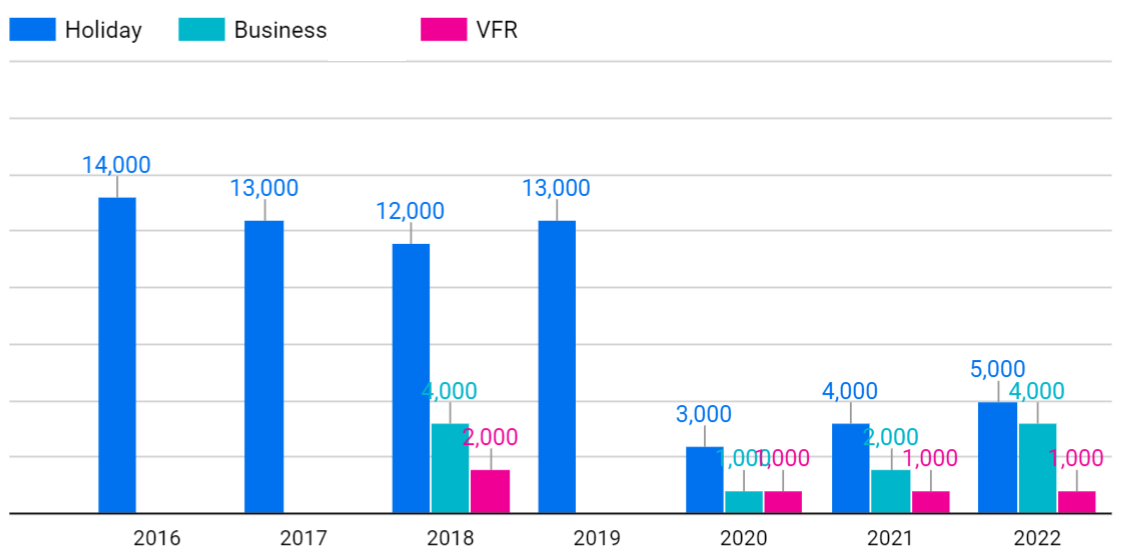
Characteristics of Danish & Swedish inbound trips to Luxembourg

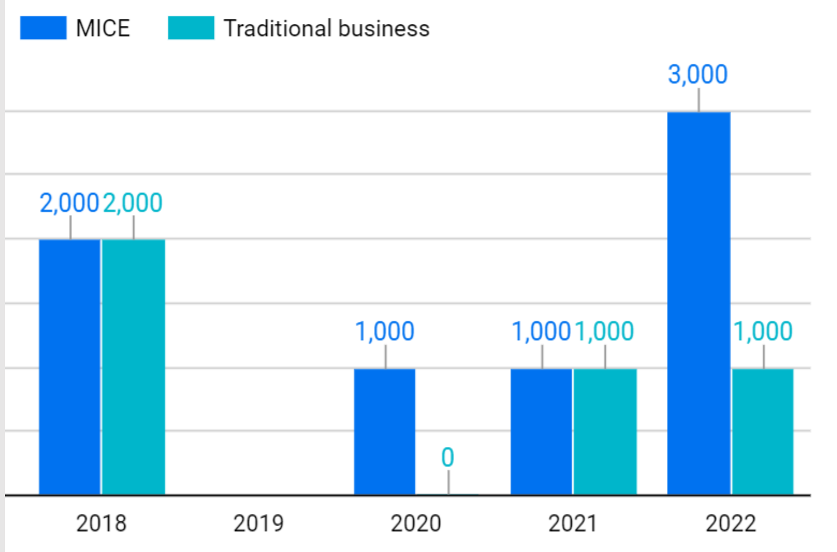
Danish & Swedish trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2016-2022









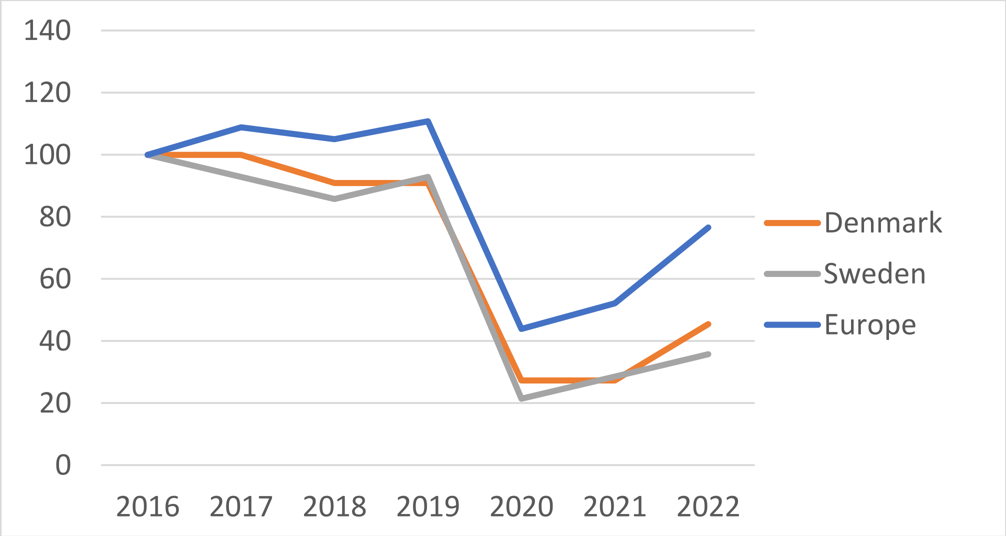
Sources: World Travel Monitor/IPK International.

Danish & Swedish trips to Luxembourg with overnight (all accommodation)
Purpose of visit, 2016-2022

2022

	Denmark to	Sweden to Luxembourg	Europe to
Holiday	53%	49%	63%
VFR	9%	11%	17%
MICE	24%	23%	12%
Traditional Business	14%	17%	8%

Danish, Swedish & European holiday trips to Luxembourg, 2016 = index 100



Source: World Travel Monitor/IPK International.

Danish & Swedish same-day trips to Luxembourg

2022

Number of Danish same-day trips to Luxembourg

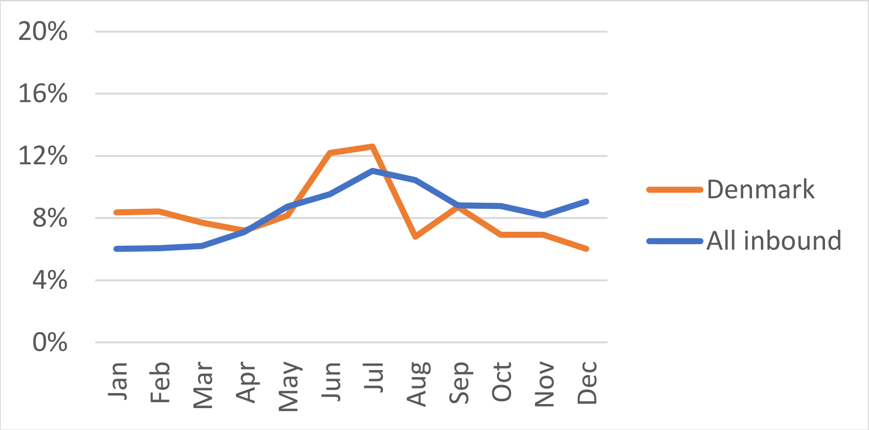
8.000
(0% of inbound same-day trips to Luxembourg)

-11% (vs. 2021)

Average length of Danish same-day trips

8,2 h
(All inbound 7,3h)

Seasonality of Danish same-day trips, % monthly share



Number of Swedish same-day trips to Luxembourg

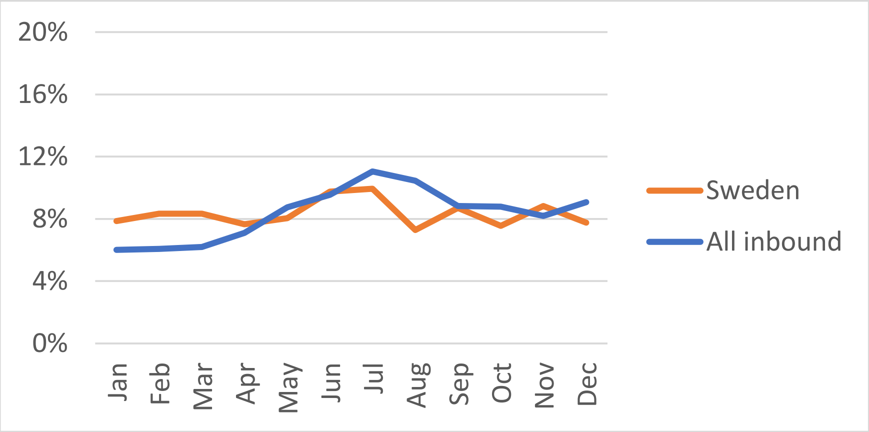
32.000
(1% of inbound same-day trips to Luxembourg)

+8% (vs. 2021)

Average length of Swedish same-day trips

7,4 h
(All inbound 7,3h)

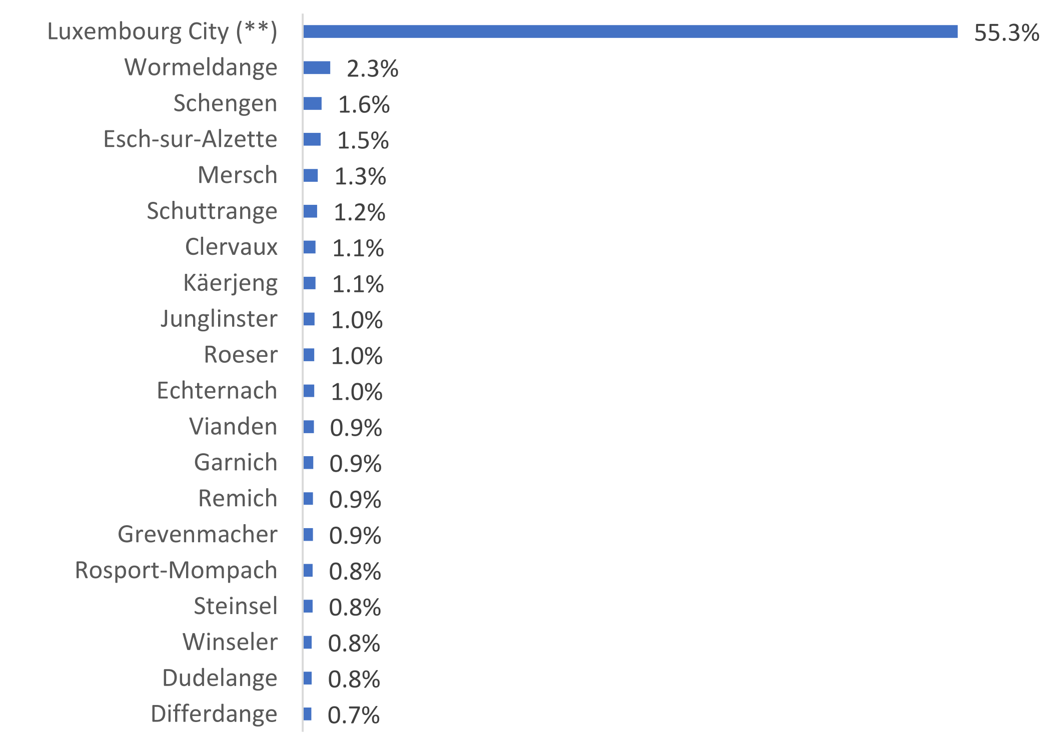
Seasonality of Swedish same-day trips, % monthly share

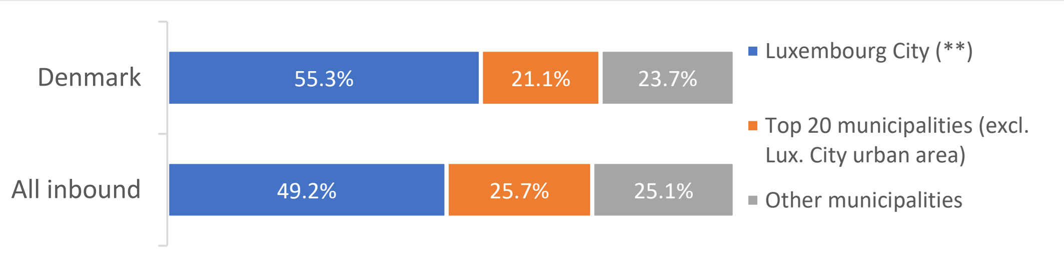


Source: Mobile phone data (Editus/LFT).

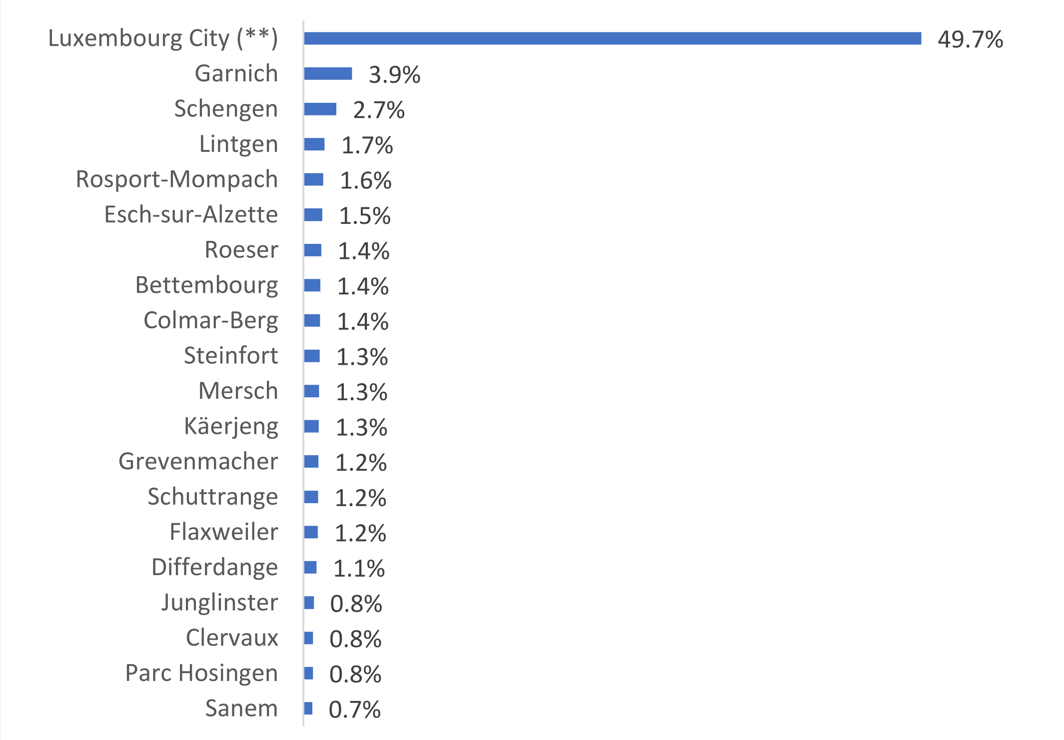
Type of places and cities visited in Luxembourg

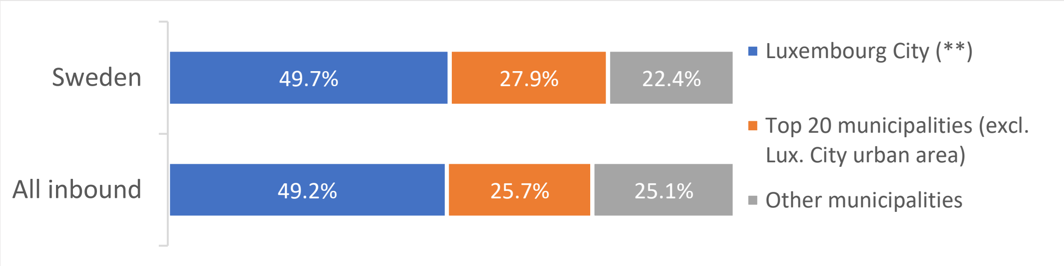
Top cities visited during Danish overnight and same-day trips (*), 2022





Top cities visited during Swedish overnight and same-day trips (*), 2022





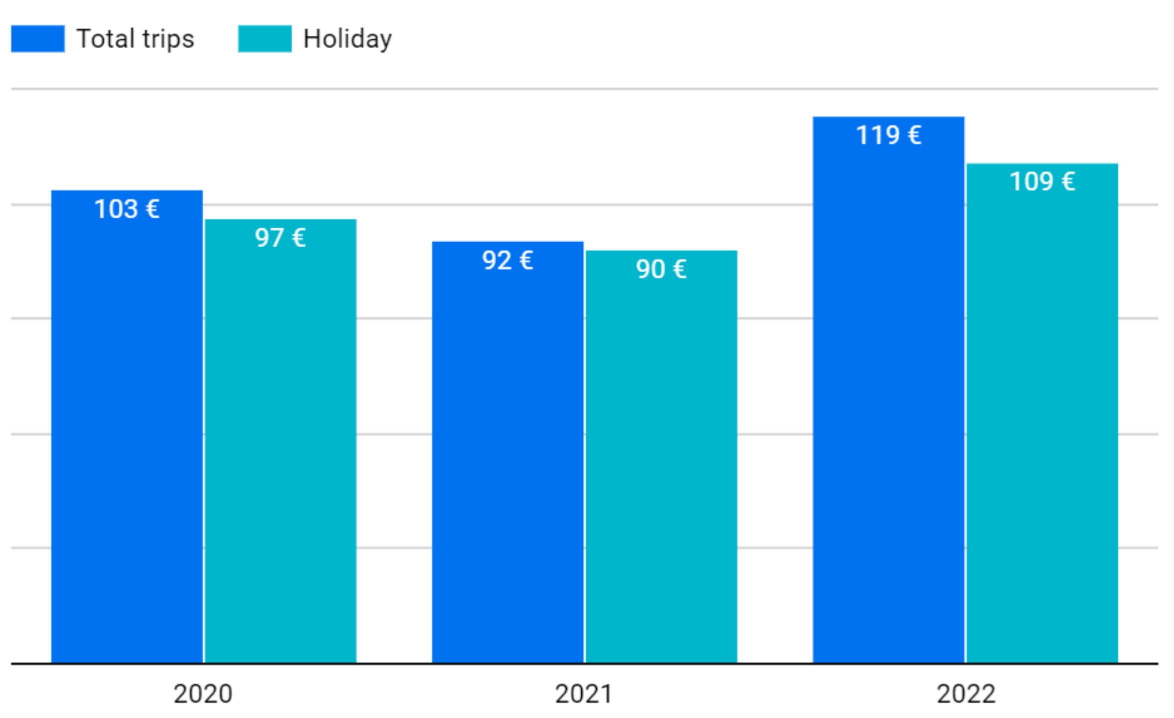
Source: Mobile phone data (Editus/LFT).

(*) Overnight trips : includes city where night is spent. Includes all cities with at least 1 h of visit. (**) Urban area (= incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange).

Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

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



2022

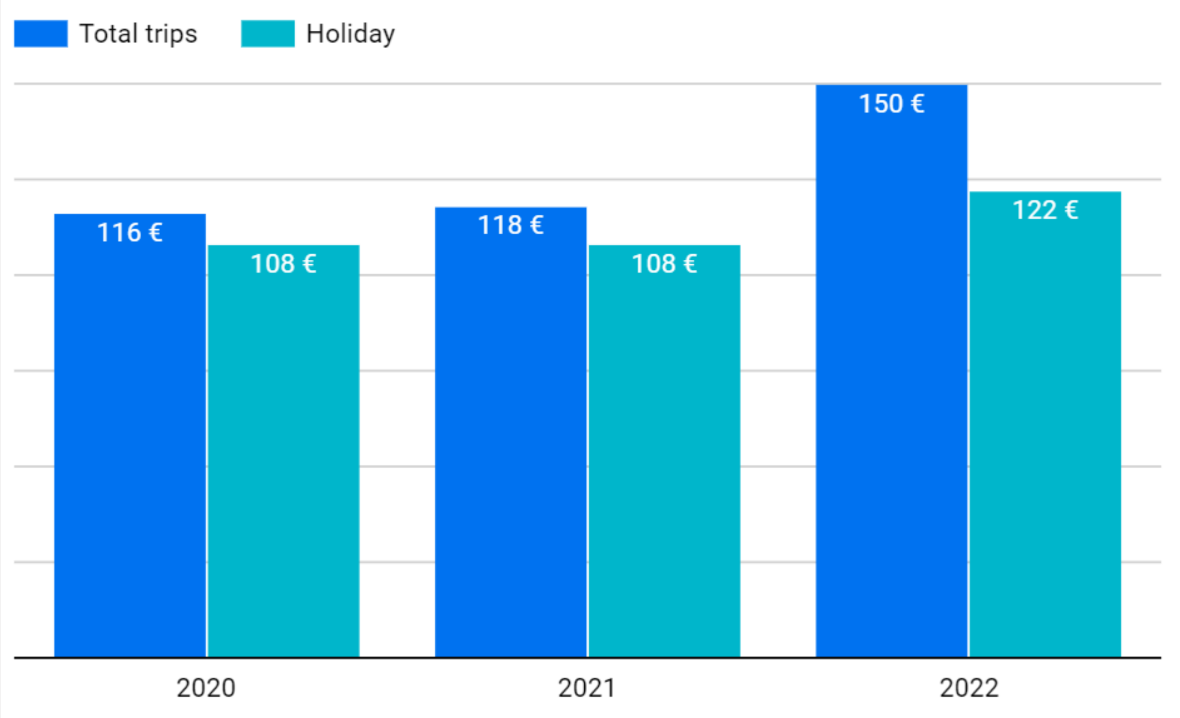
	Denmark to Luxembourg	**Europe to** Luxembourg
Spend/day/pers. on **all** trips	119 €	124 €
Spend/day/pers. on **holiday** trips	109 €	118 €

Source: World Travel Monitor/IPK International.

Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

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



2022

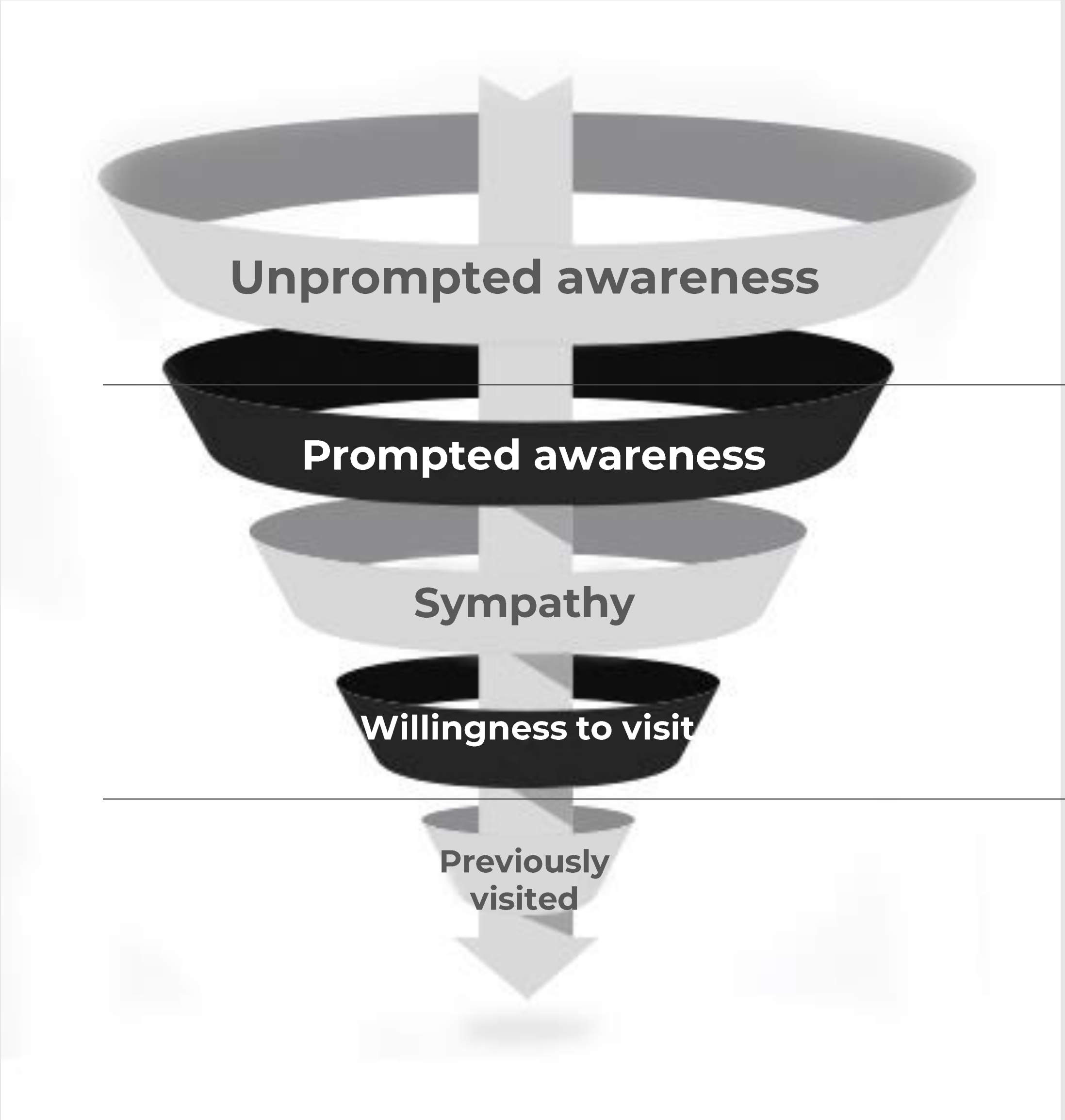
	Sweden to Luxembourg	Europe to Luxembourg
Spend/day/pers. on **all** trips	150 €	124 €
Spend/day/pers. on **holiday** trips	122 €	118 €

Source: World Travel Monitor/IPK International.

Target segments,
Brand & Growth Potential

Brand Funnel 2021-2023

Assessing Luxembourg’s brand strength as a destination



	
(*)	1.5%
86%	80%
56%	49%
33%	25%
24%	20%

Total future visitor potential from Denmark (**)

1.4 million

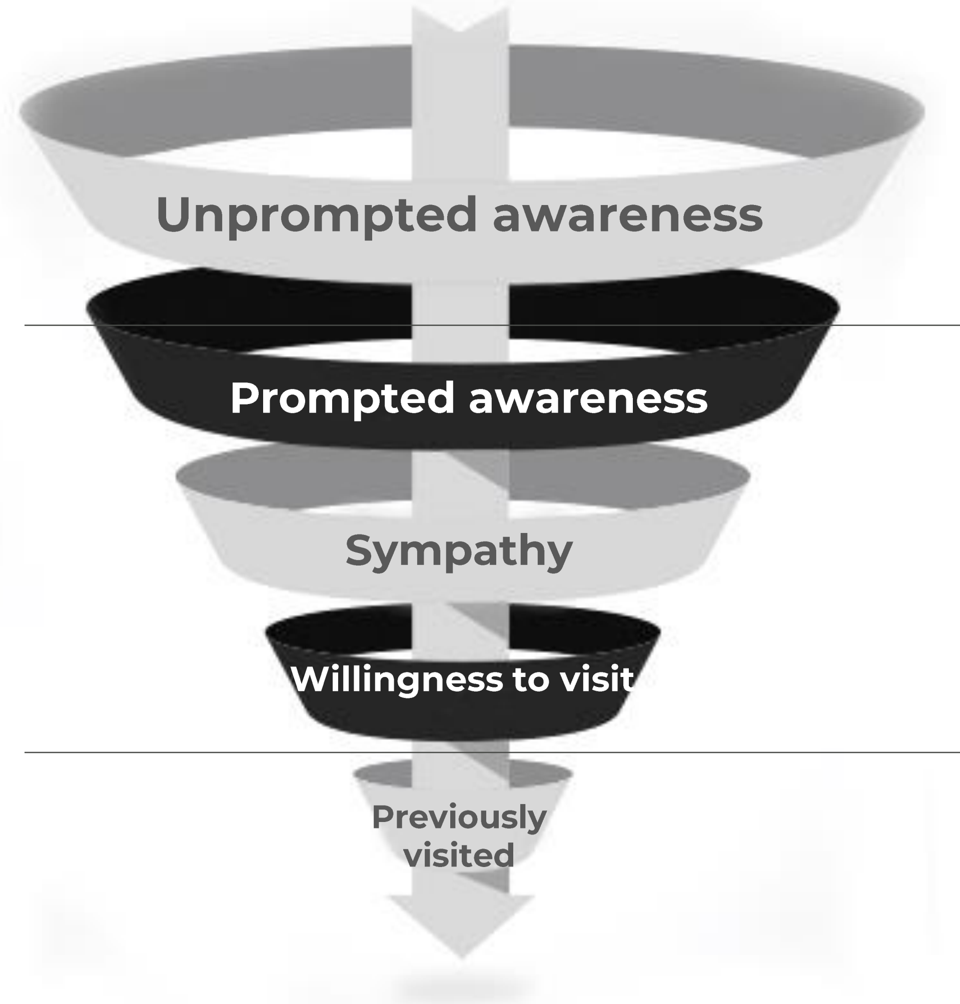
Highest future travel intent from Denmark (***)

1. Explorers
2. Perfection Seekers
3. Nature-Loving Actives

Source: LFT.
(*) Not compiled in Denmark.
(**) Based on travel intent for next 3 years.
(***) Based on relative shares of travel intent for next 3 years.

Brand Funnel 2021-2023

Assessing Luxembourg's brand strength as a destination



		
Unprompted awareness	(*)	1.5%
Prompted awareness	82%	80%
Sympathy	50%	49%
Willingness to visit	27%	25%
Previously visited	17%	20%

Total future visitor potential from Sweden (**)

2.1 million

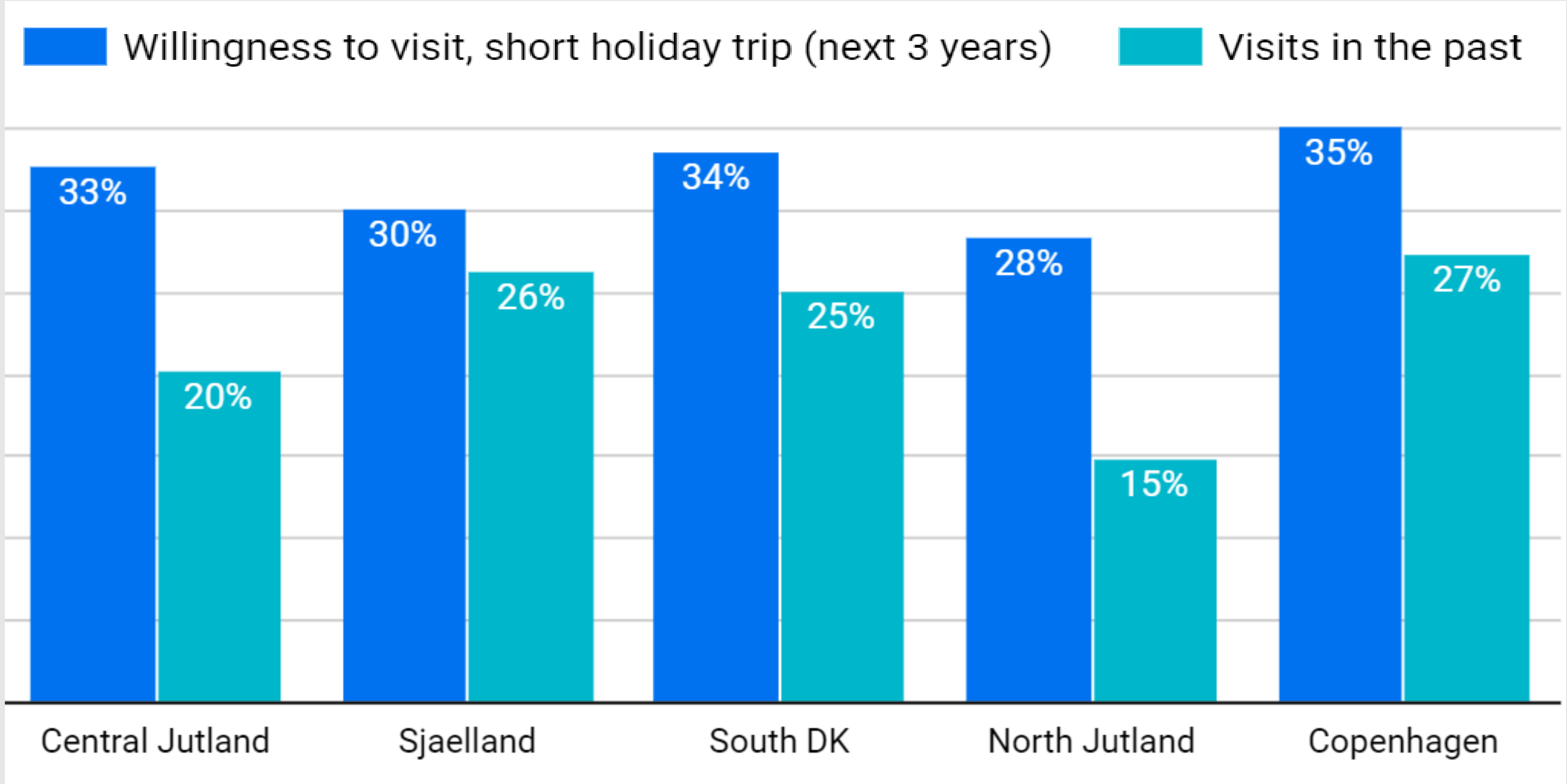
Highest future travel intent from Sweden (***)

1. Perfection Seekers
2. Nature-Loving Actives
3. Explorers

Source: LFT.
(*) Not compiled in Sweden.
(**) Based on travel intent for next 3 years.
(***) Based on relative shares of travel intent for next 3 years.

Regional origin 2021-2022

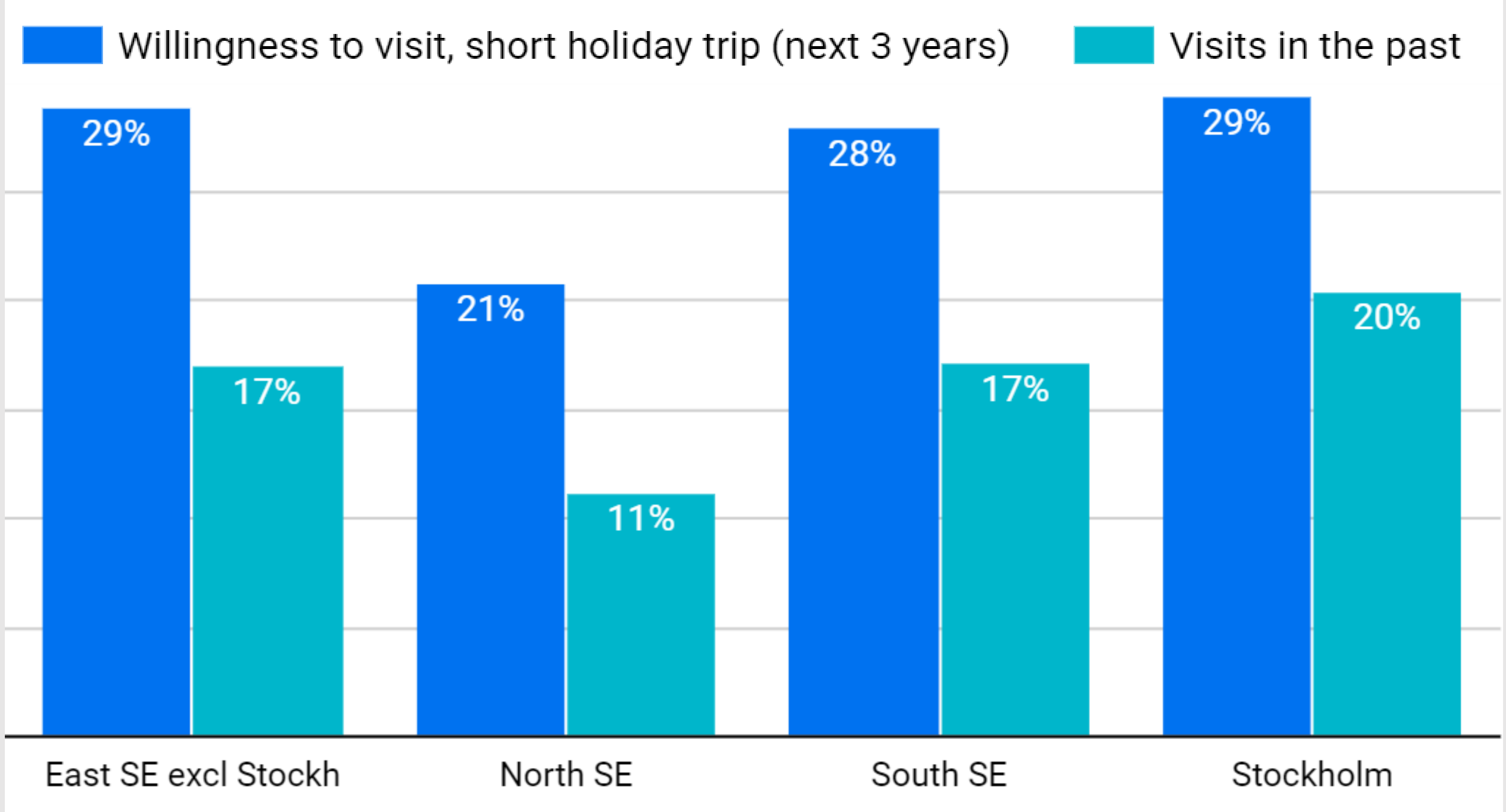
Past visitors and future potential



Source: LFT.

Regional origin 2021-2022

Past visitors and future potential



Source: LFT.

General theme interest (*)

Theme	EU Rank	DK Rank	DK % interested
	Rank	**Rank**	% interested
Resting/Relaxation	1	**1**	65%
Culinary	2	**2**	63%
Nature	3	**3**	62%
Family	11	**4**	58%
City	4	**5**	58%
Culture	6	**6**	50%
Events	14	**7**	49%
Luxury	17	**8**	49%
History/Unesco	7	**9**	49%
Shopping	10	**10**	48%
Castles	5	**11**	46%
Sustainability	9	**12**	46%
Wellness	13	**13**	46%
Hiking	8	**14**	46%
Nightlife (**)	12	**15**	45%
Countryside	15	**16**	44%
Wine	16	**17**	42%
Camping	20	**18**	41%
Active-sports	18	**19**	39%
Industrial heritage	19	**20**	34%
Cycling	21	**21**	30%
MTB	22	**22**	27%
Motorcycling	23	**23**	25%

(*) 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.

General theme interest (*)

Theme	EU	SE	SE
	Rank	**Rank**	% interested
Resting/Relaxation	1	**1**	65%
Culinary	2	**2**	64%
Nature	3	**3**	60%
City	4	**4**	57%
Sustainability	9	**5**	56%
Family	11	**6**	56%
History/Unesco	7	**7**	52%
Culture	6	**8**	50%
Events	14	**9**	49%
Castles	5	**10**	48%
Luxury	17	**11**	48%
Countryside	15	**12**	47%
Shopping	10	**13**	46%
Wine	16	**14**	46%
Nightlife (**)	12	**15**	46%
Hiking	8	**16**	42%
Wellness	13	**17**	39%
Active-sports	18	**18**	39%
Camping	20	**19**	38%
Industrial heritage	19	**20**	36%
Cycling	21	**21**	31%
Motorcycling	23	**22**	26%
MTB	22	**23**	24%

(*) 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.

Luxembourg‘s Theme Competence (*)

Theme	Europe	Denmark	Denmark
	Rank	**Rank**	% agreeing
City	1	**1**	48%
Culinary	6	**2**	45%
Resting/Relaxation	2	**3**	45%
Culture	4	**4**	42%
Shopping	5	**5**	42%
Family	14	**6**	40%
History/Unesco	8	**7**	39%
Nature	7	**8**	37%
Nightlife (***)	11	**9**	37%
Castles	3	**10**	36%
Wellness	9	**11**	35%
Wine	16	**12**	34%
Active-sports	18	**13**	32%
Hiking	10	**14**	32%
Sustainability	12	**15**	31%
Camping	15	**16**	30%
Countryside	17	**17**	29%
Industrial Heritage	19	**18**	29%
Cycling	13	**19**	27%
MTB	20	**20**	24%

Growth potential for themes (**)

- Nature
- Castles
- Countryside
- Hiking

(*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.
(**) Themes for which Luxembourg‘s theme suitability is still relatively low, compared to the overall general theme interest.
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.

Luxembourg‘s Theme Competence (*)

Theme	Europe Rank	Sweden Rank	Sweden % agreeing
City	1	1	48%
Culinary	6	2	46%
Culture	4	3	42%
Resting/Relaxation	2	4	42%
Shopping	5	5	41%
Castles	3	6	38%
Nightlife	11	7	37%
Family	14	8	37%
History/Unesco	8	9	37%
Nature	7	10	36%
Wine	16	11	35%
Sustainability	12	12	34%
Countryside	17	13	33%
Wellness	9	14	29%
Camping	15	15	29%
Active-sports	18	16	29%
Cycling	13	17	28%
Hiking	10	18	27%
Industrial Heritage	19	19	26%
MTB	20	20	22%

Growth potential for themes (**)

- Nature
- History/Unesco
- Countryside
- Hiking
- Industrial Heritage

(*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.
(**) Themes for which Luxembourg‘s theme suitability is still relatively low, compared to the overall general theme interest.
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.

Luxembourg's Brand Value Ratings (*)

Feature			
	Rank	**Rank**	% agreeing
Safe	1	**1**	40%
Of high quality	2	**2**	40%
Open-minded, tolerant	8	**3**	39%
Authentic	3	**4**	39%
Welcoming, hospitable	4	**5**	38%
Exclusive, luxurious	7	**6**	36%
Attractive, appealing	5	**7**	35%
Surprising	9	**8**	32%
Service-oriented	11	**9**	32%
Dynamic, modern	6	**10**	32%
Lively, hip	12	**11**	30%
Lot of variety, diversified	10	**12**	27%
Not crowded, insider tip	13	**13**	23%
Sustainable	14	**14**	20%

(*) 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.

Luxembourg's Brand Value Ratings (*)

Feature	Europe	Sweden	Sweden
	Rank	**Rank**	% agreeing
Safe	1	**1**	35%
Welcoming, hospitable	4	**2**	34%
Of high quality	2	**3**	33%
Exclusive, luxurious	7	**4**	31%
Attractive, appealing	5	**5**	29%
Authentic	3	**6**	27%
Service-oriented	11	**7**	25%
Surprising	9	**8**	25%
Dynamic, modern	6	**9**	24%
Lively, hip	12	**10**	24%
Open-minded, tolerant	8	**11**	23%
Lot of variety, diversified	10	**12**	22%
Not crowded, insider tip	13	**13**	21%
Sustainable	14	**14**	20%

(*) 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.

LFT strategic market focus

Market priorisation

Market Priority	Main Objective	Target Segment focus (in decreasing order of importance within category)
		Bold : main focus
5	Activating	Image: **NLA.** Activating: **EXP**, PS.

Theme & segment focus

Theme	Priority	Marketing	Segments
Culture	2	Image & Activating	EXP, PS
Castles	1	Image	PS
Hiking	1	Image	PS, NLA
City	3	Activating	EXP, PS, (NLA)
Culinary	2	Activating	PS, EXP
Wine	2	Image	PS, NLA, EXP
Industrial Heritage	4	Activating	EXP, NLA

Brand Value focus

Theme	Priority	Segments
Sustainable	1	PS NLA EXP
Dynamic/modern	1	
Lot of variety	2	
Attractive	2	
Open-minded	3	
Authentic	3	

LFT strategic market focus

Market priorisation

Market Priority	Main Objective	Target Segment focus (in decreasing order of importance within category)
		Bold : main focus
5	Image	Image: **EXP, PS**. Activating: NLA.

Theme & segment focus

Theme	Priority	Marketing	Segments
Culture	1	Image & Activating	EXP, PS
Culinary	2	Activating	PS
City	2	Activating	EXP, PS
Nature	3	Image & Activating	NLA, EXP
Sustainability	2	Image	NLA, EXP
Industrial Heritage	3	Image & Activating	PS, NLA, EXP
Castles	3	Image	PS

Brand Value focus

Theme	Priority	Segments
Lot of variety	1	NLA (PS)
Open-minded	1	
Not crowded/insider tip	2	

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