Luxembourg for Tourism

Market profile FRANCE 2022

Economic indicators & General Travel Demand

Economic indicators – General travel demand

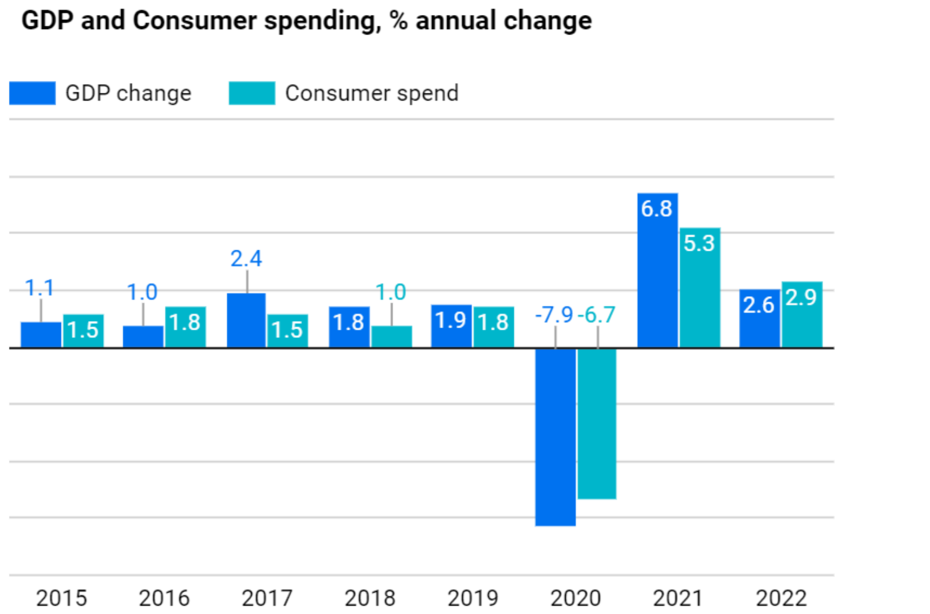
Economy & population

GDP (PPP) per capita **$47,251**

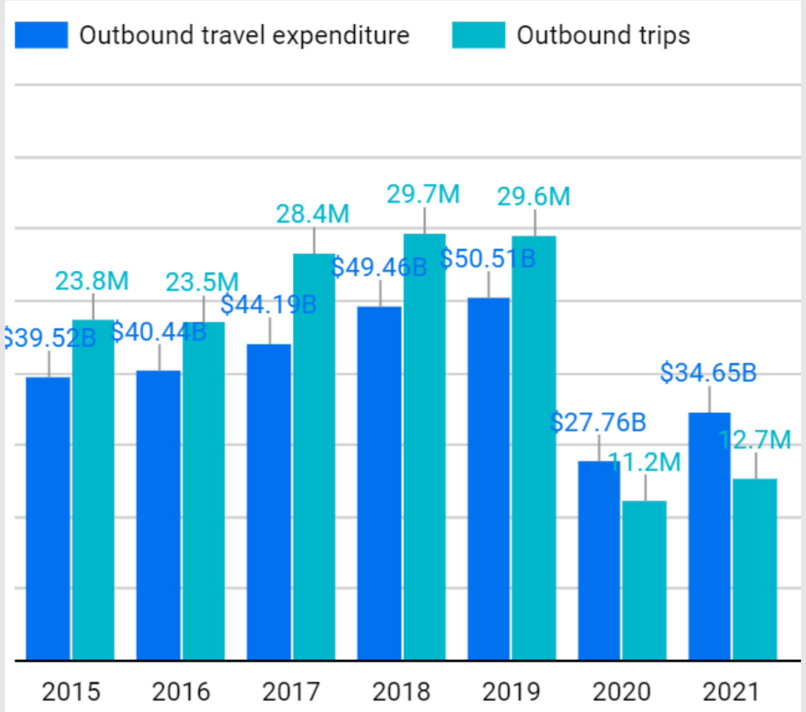
Unemployment (%) **7.6**

Population (mn) **65.6**

Inflation (%) **5.2**



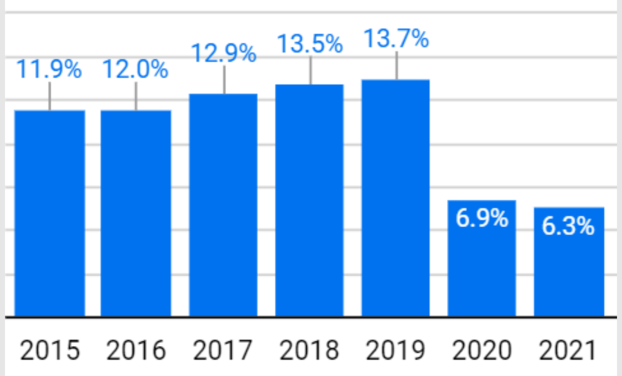
Outbound trips and travel expenditure



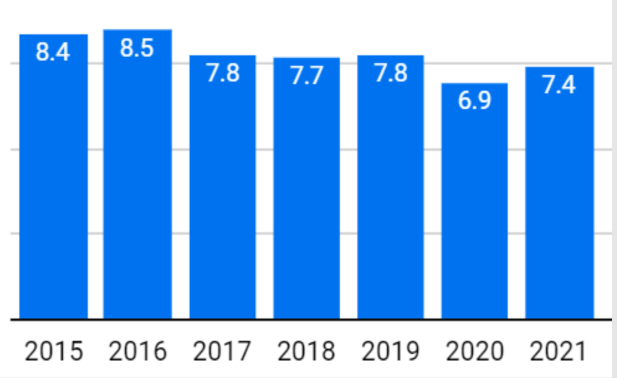
Average spend
per outbound trip (2019)
1.705 $

Outbound travel intensity
0.46 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)
87.6%

Sources: Eurostat, IMF.

Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation

2022

**Nights,
paid accommodation, 2022**

248.008

+27% (vs. 2021)
+8% (vs. 2019)

**Arrivals,
paid accommodation, 2022**

137.174

+26% (vs. 2021)
+3% (vs. 2019)

**Average length of stay,
paid accommodation, 2022**

1.81 days

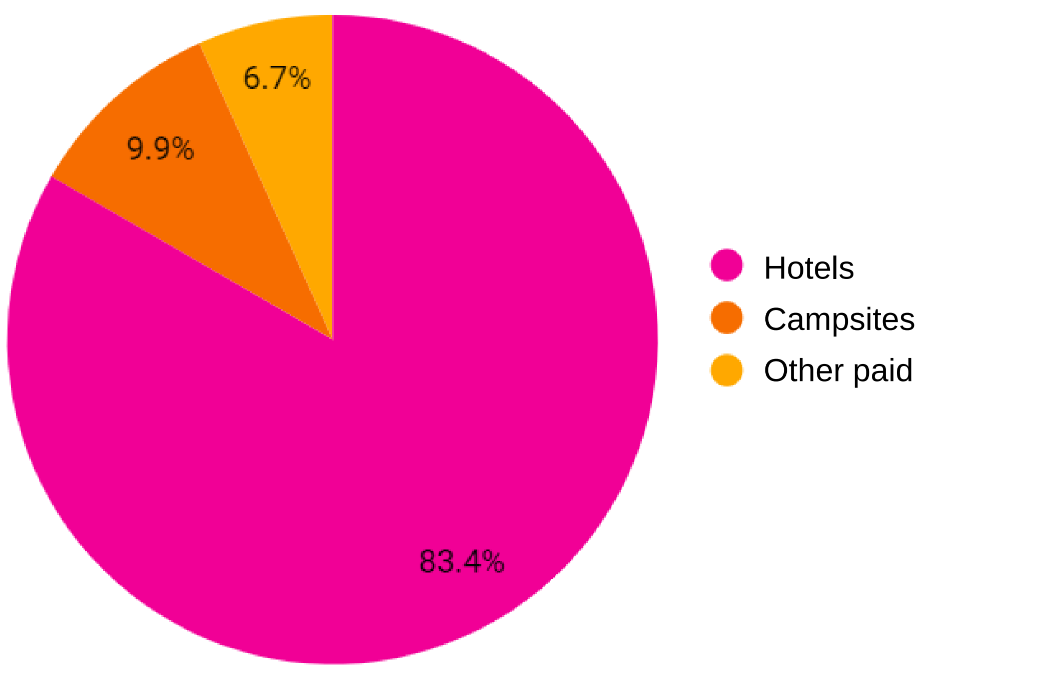
+0.01 days (vs. 2021)
+0.09 days (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

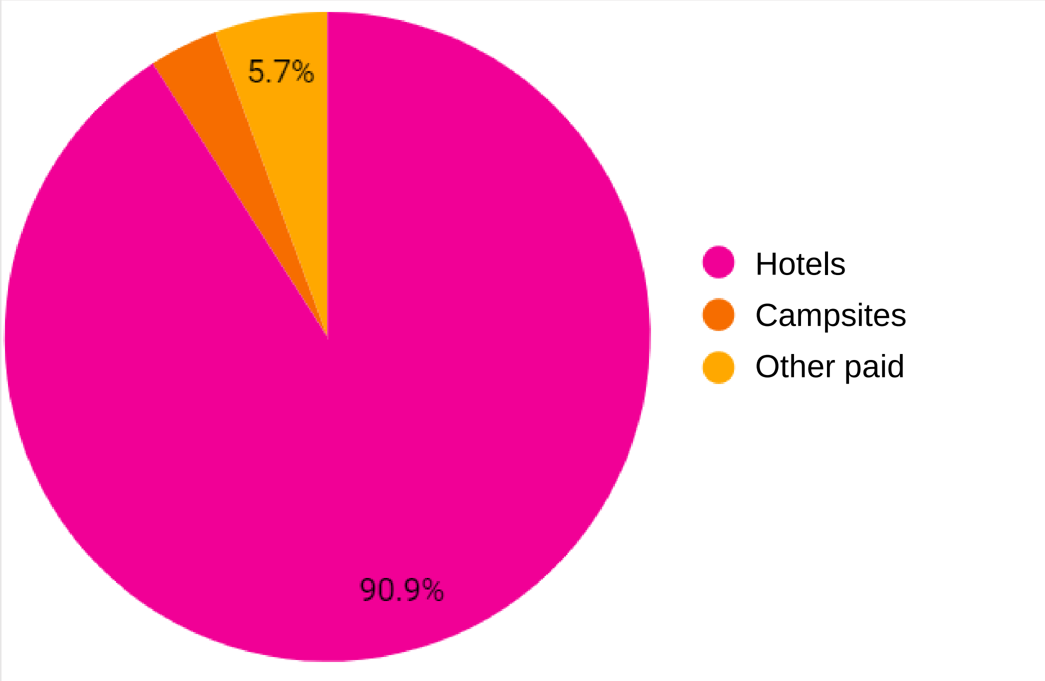
Type of accommodation, 2022

Nights, paid accommodation



Hotels	**206.750**	+6% (vs. 2019)
Campsites	**24.579**	+25% (vs. 2019)
Other paid	**16.679**	+13% (vs. 2019)

Arrivals, paid accommodation



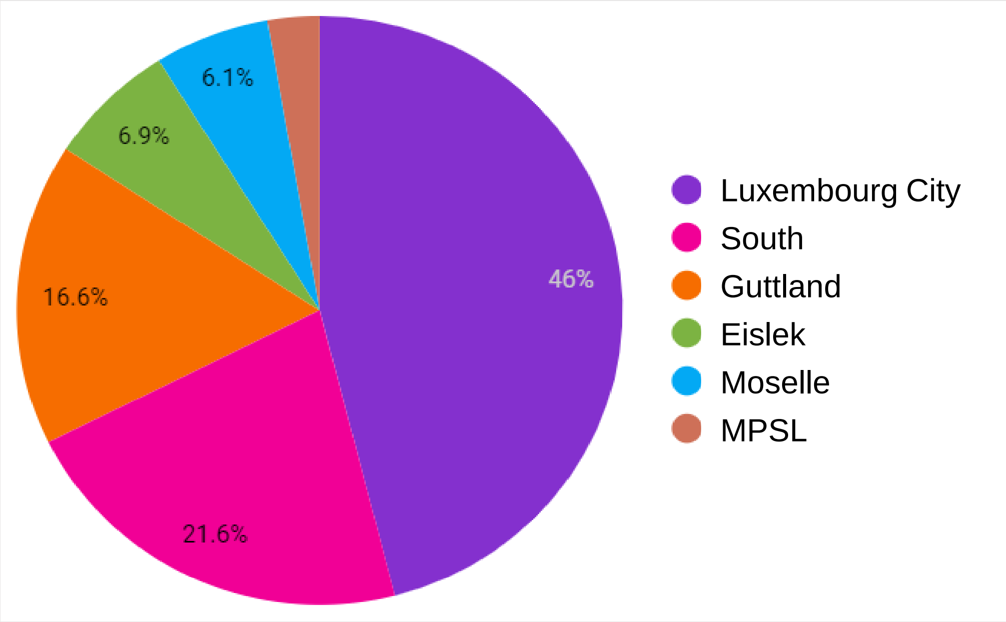
Hotels	**124.699**	+1% (vs. 2019)
Campsites	**4.715**	+58% (vs. 2019)
Other paid	**7.760**	+2% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

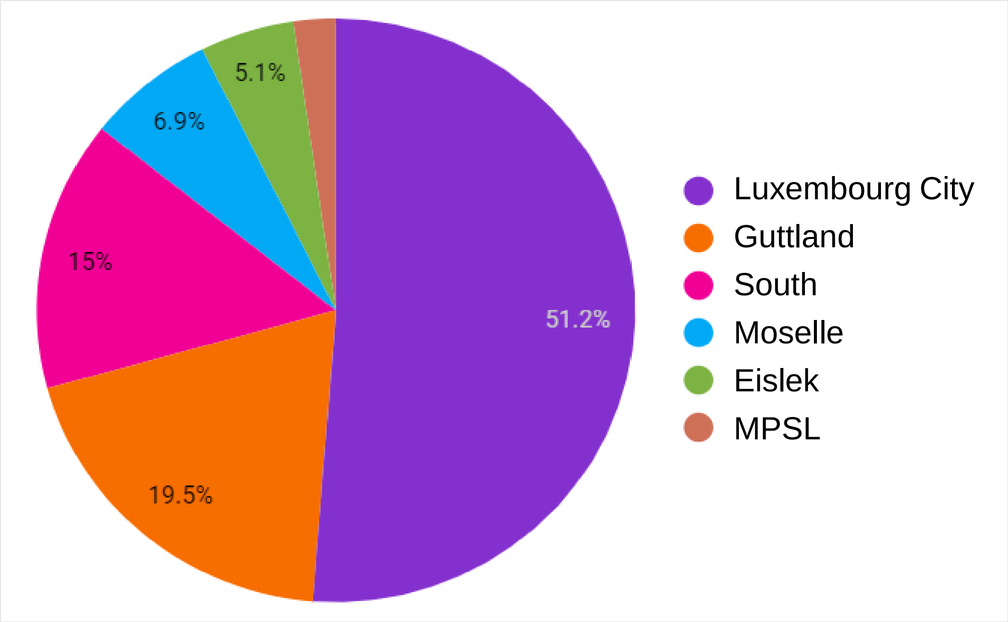
Regions, 2022

Nights, paid accommodation



Luxembourg City	114.071	-1% (vs. 2019)
South	53.630	+43% (vs. 2019)
Guttland	41.166	+41% (vs. 2019)
Eislek	17.060	+14% (vs. 2019)
Moselle	15.209	-34% (vs. 2019)
MPSL	6.872	-29% (vs. 2019)

Arrivals, paid accommodation

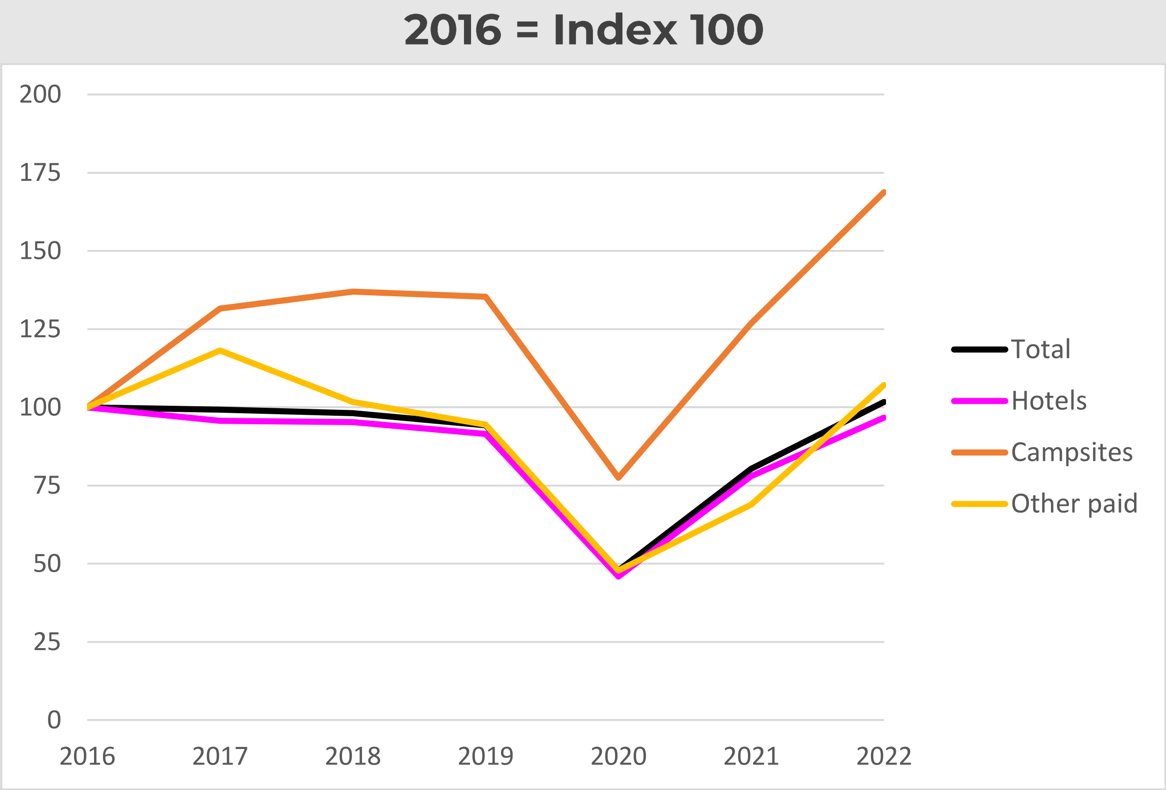


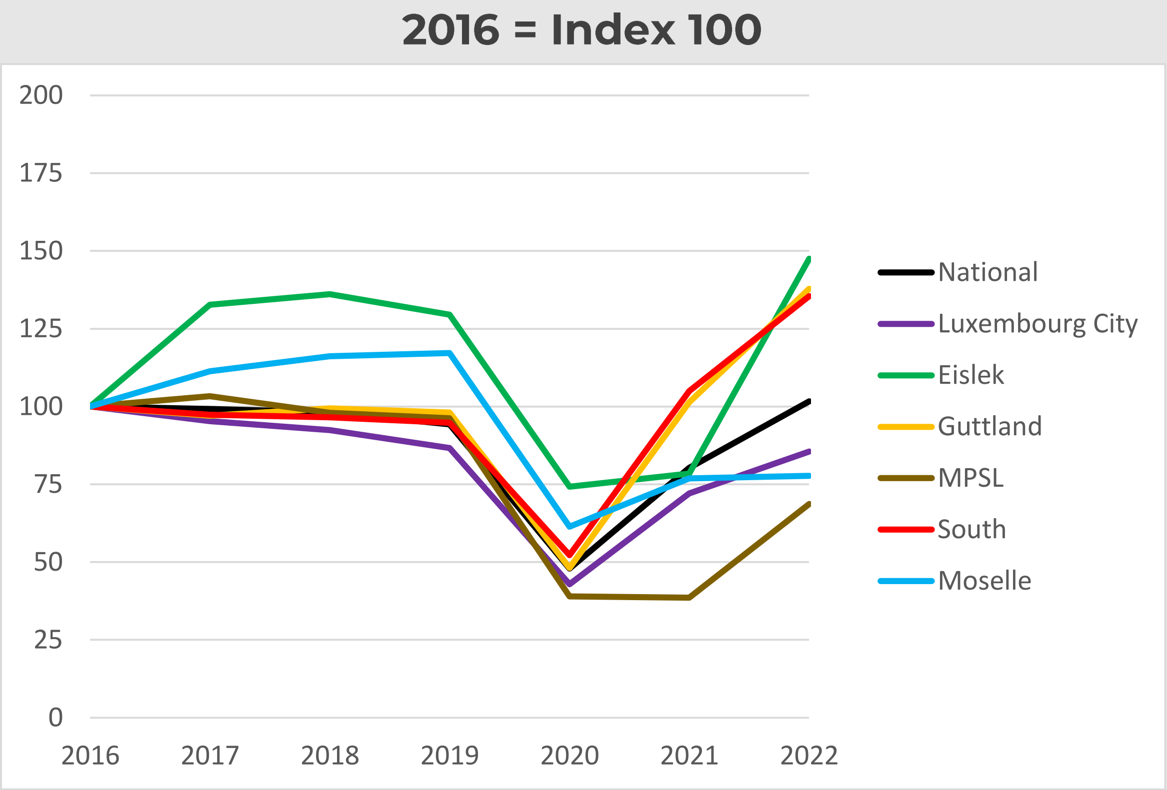
Luxembourg City	70.259	-2% (vs. 2019)
Guttland	26.719	+30% (vs. 2019)
South	20.574	+20% (vs. 2019)
Moselle	9.517	-31% (vs. 2019)
Eislek	6.974	+19% (vs. 2019)
MPSL	3.131	-22% (vs. 2019)

Source: Statec

Nights in paid accommodation

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



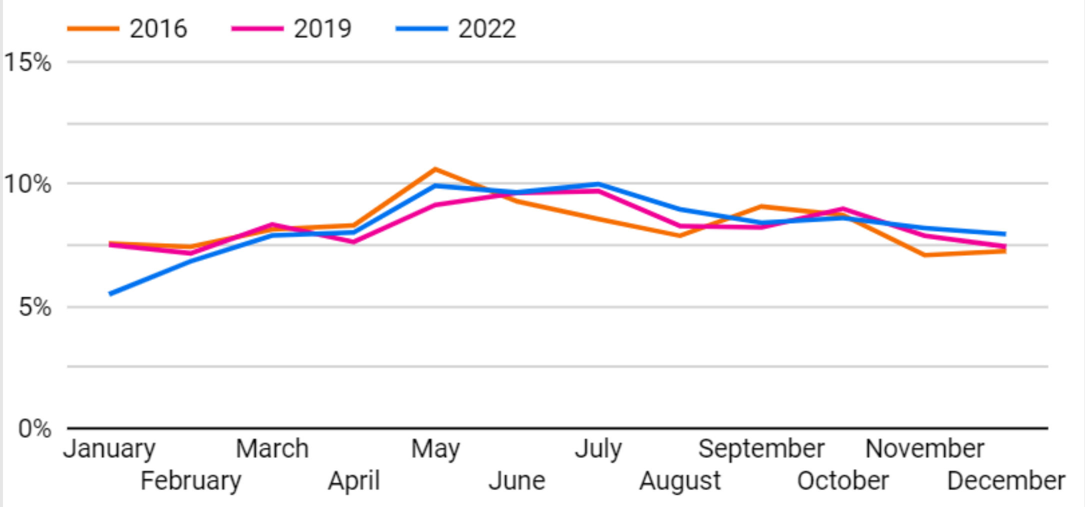


Source: Statec

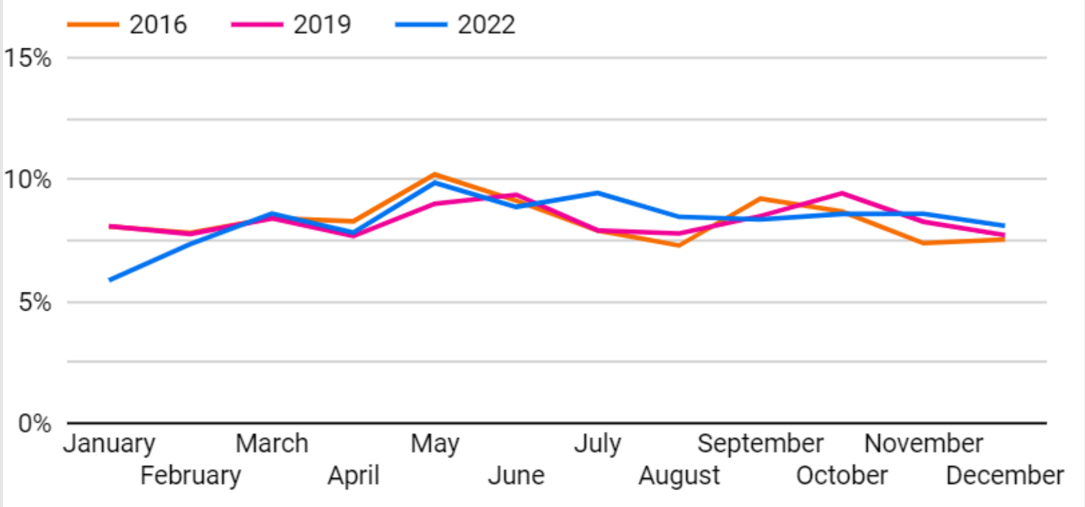
Nights in paid accommodation

Seasonality

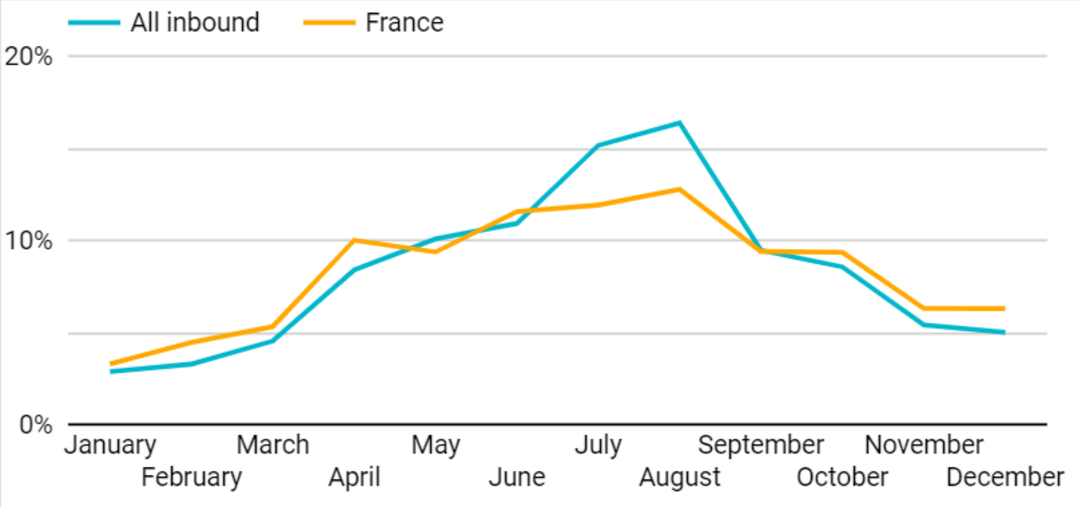
French nights, all paid accommodation



French nights, hotels



Nights, all paid accommodation, 2022

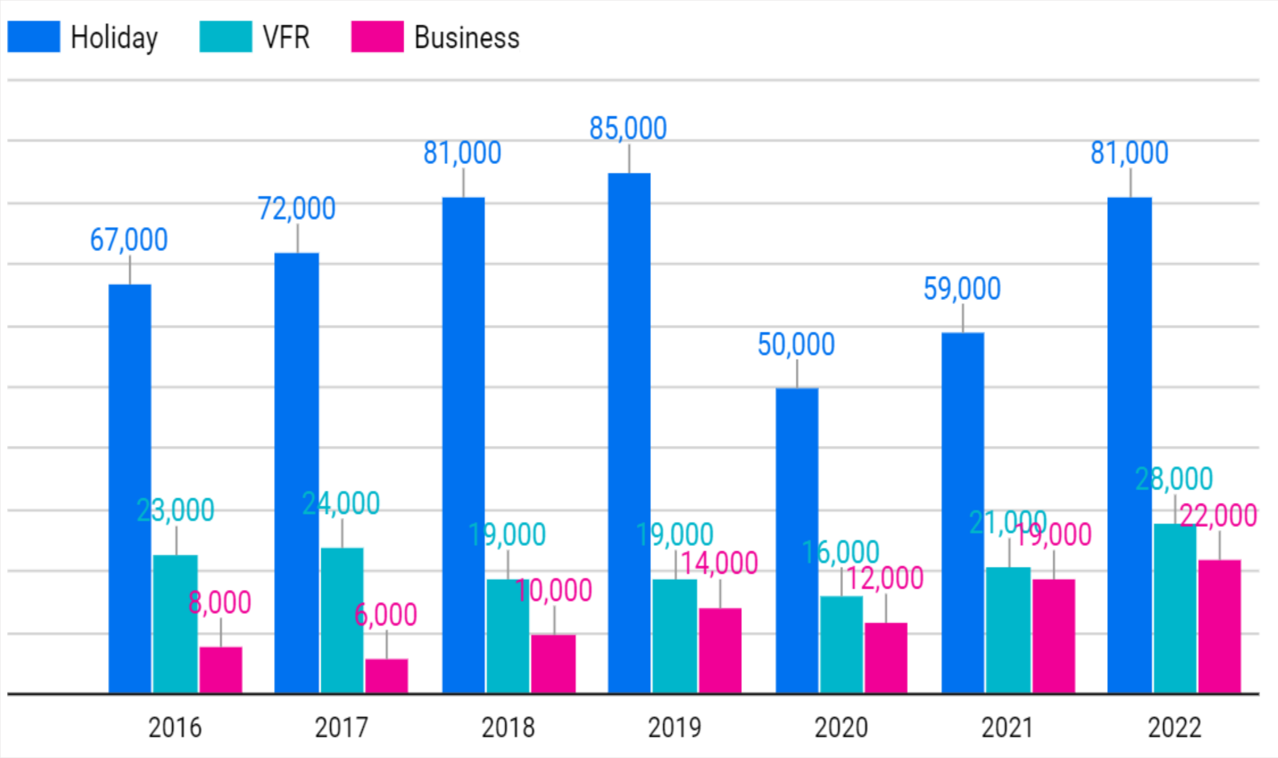


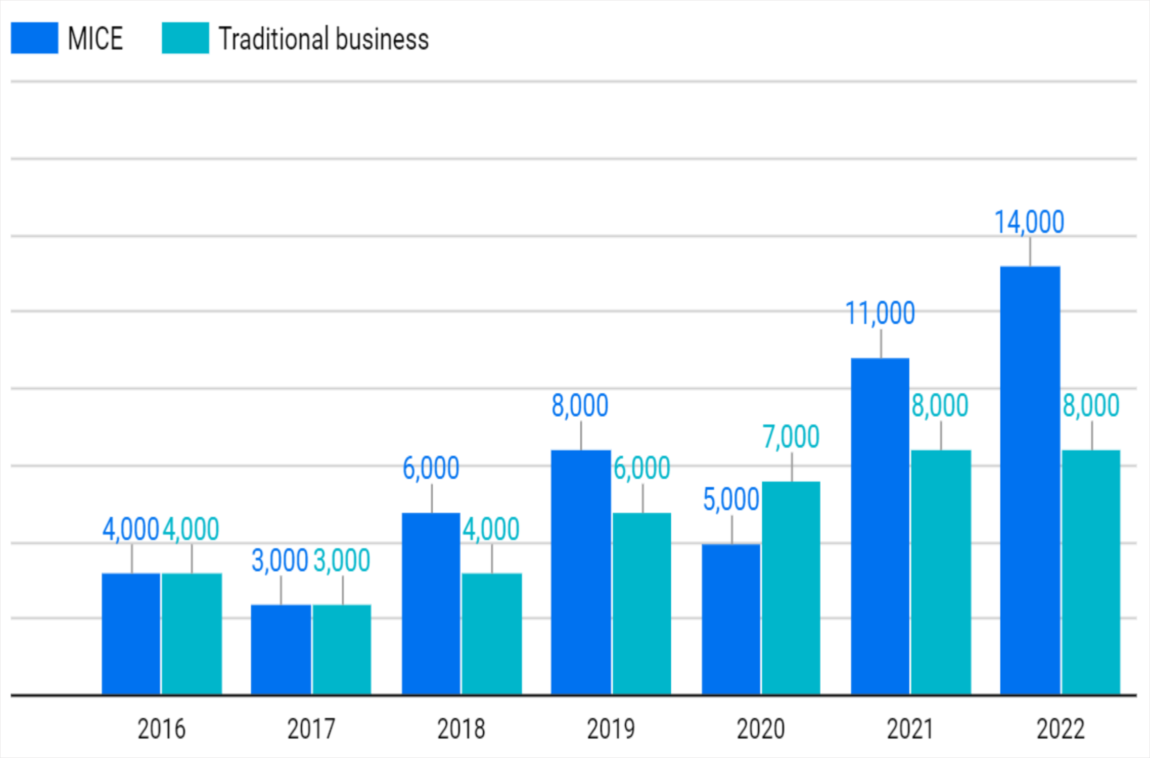
Source: Statec

Characteristics of French inbound trips to Luxembourg

French trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2016-2022



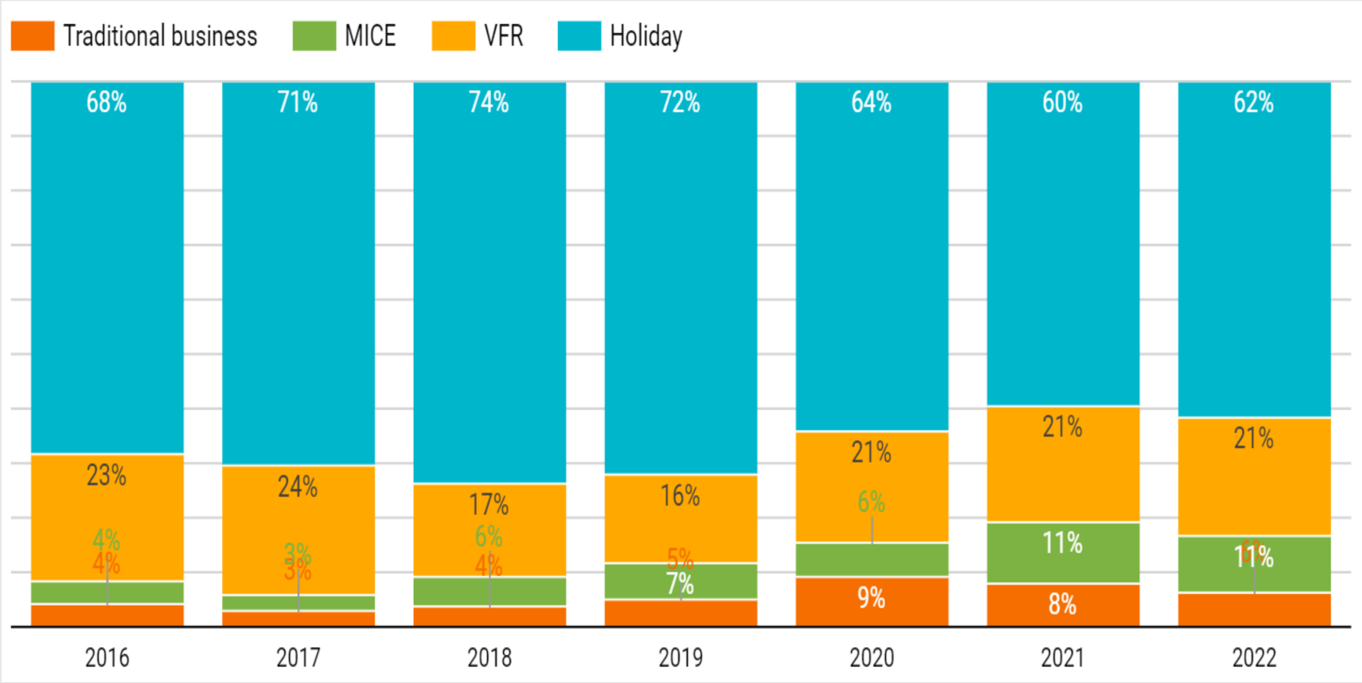


Sources: World Travel Monitor/IPK International.

French trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2016-2022

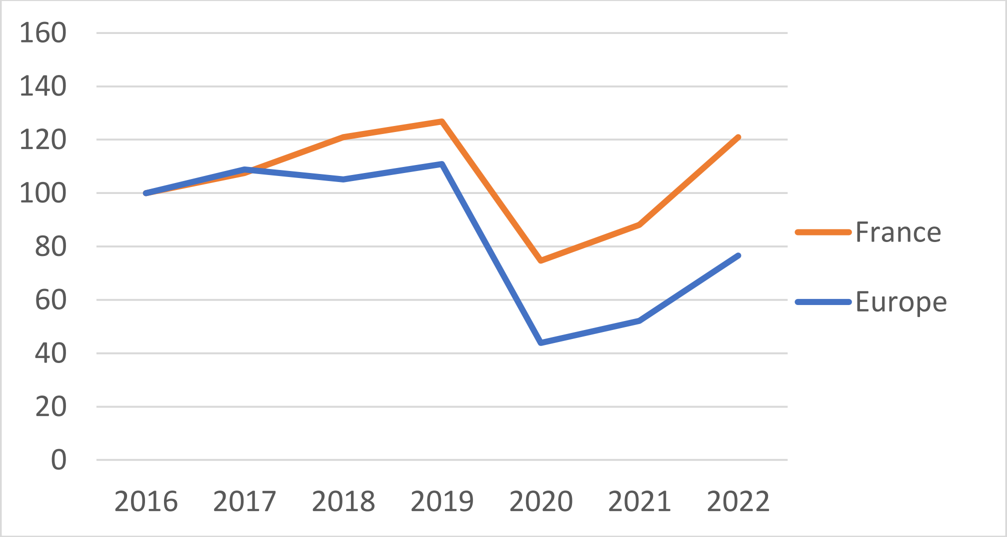
French trips to Luxembourg, 2016-2022



2022

	France to Luxembourg	Europe to Luxembourg
Holiday	62%	63%
VFR	21%	17%
MICE	11%	12%
Traditional Business	6%	8%

French & European holiday trips to Luxembourg, 2016 = index 100



Source: World Travel Monitor/IPK International.

French same-day trips to Luxembourg
2022

Number of French same-day trips to Luxembourg

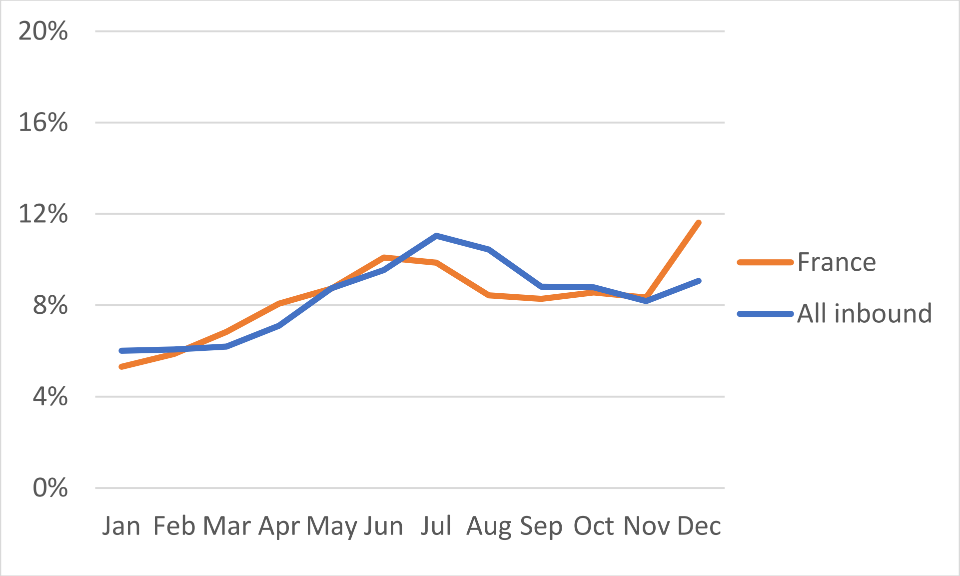
496.000
(18% of inbound same-day trips to Luxembourg)

+0% (vs. 2021)

Average length of same-day trips

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

Seasonality of same-day trips, % monthly share



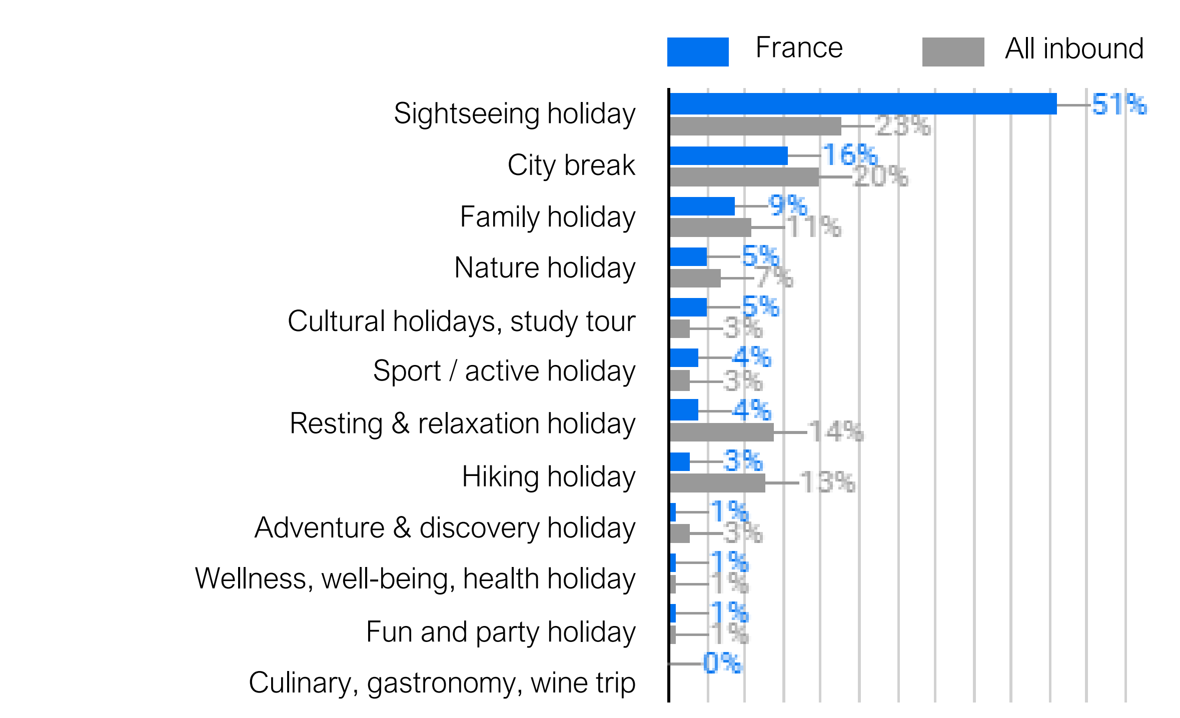
Source: Mobile phone data (Editus/LFT).

Travel behaviour of French leisure visitors in Luxembourg

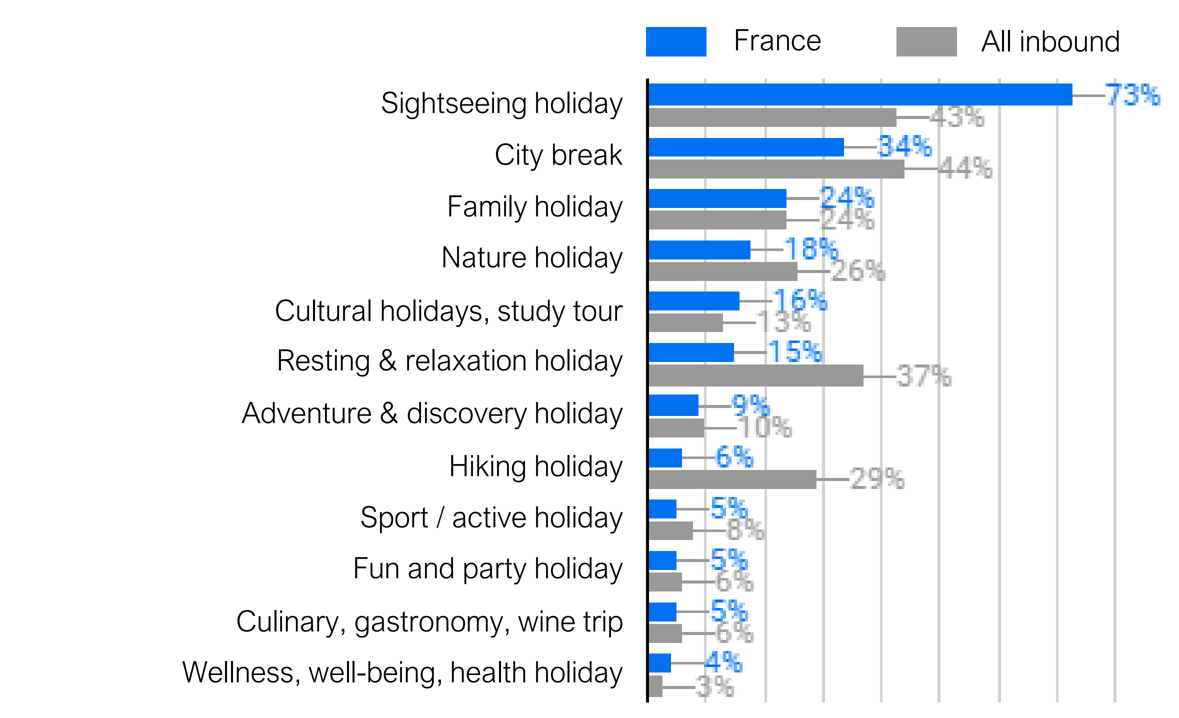
Holiday types

Inbound leisure visitors with overnight, 2020-2022

Main holiday types



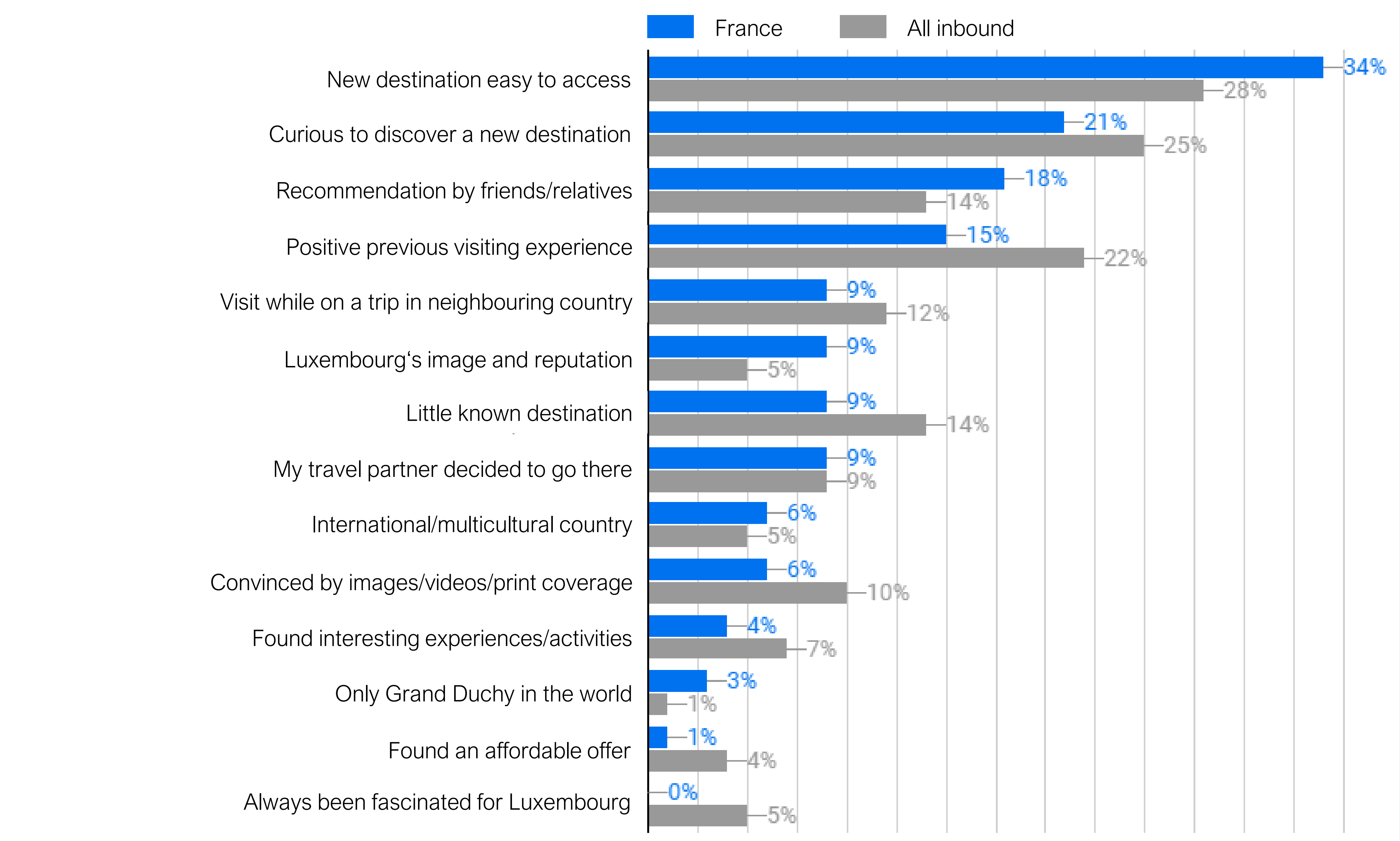
Additional holiday types



Source: LFT/Ilres Visitor Survey, 2020-2022.

Key decision criteria for choosing Luxembourg

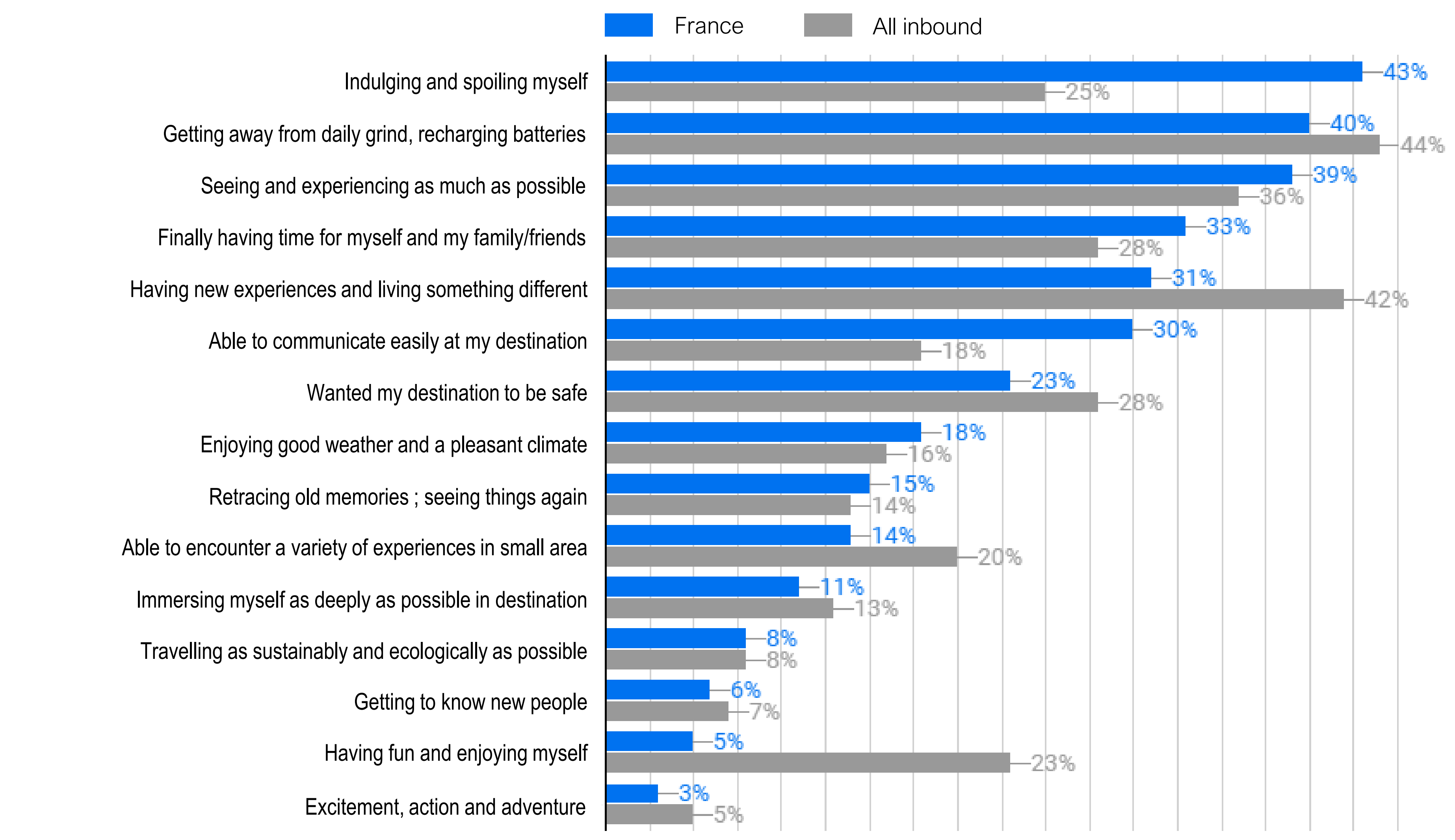
Inbound leisure visitors with overnight (*), 2020-2022



Source: LFT/Ilres Visitor Survey, 2020-2022.
(*) Maximum 3 answers possible.

Key travel motivations

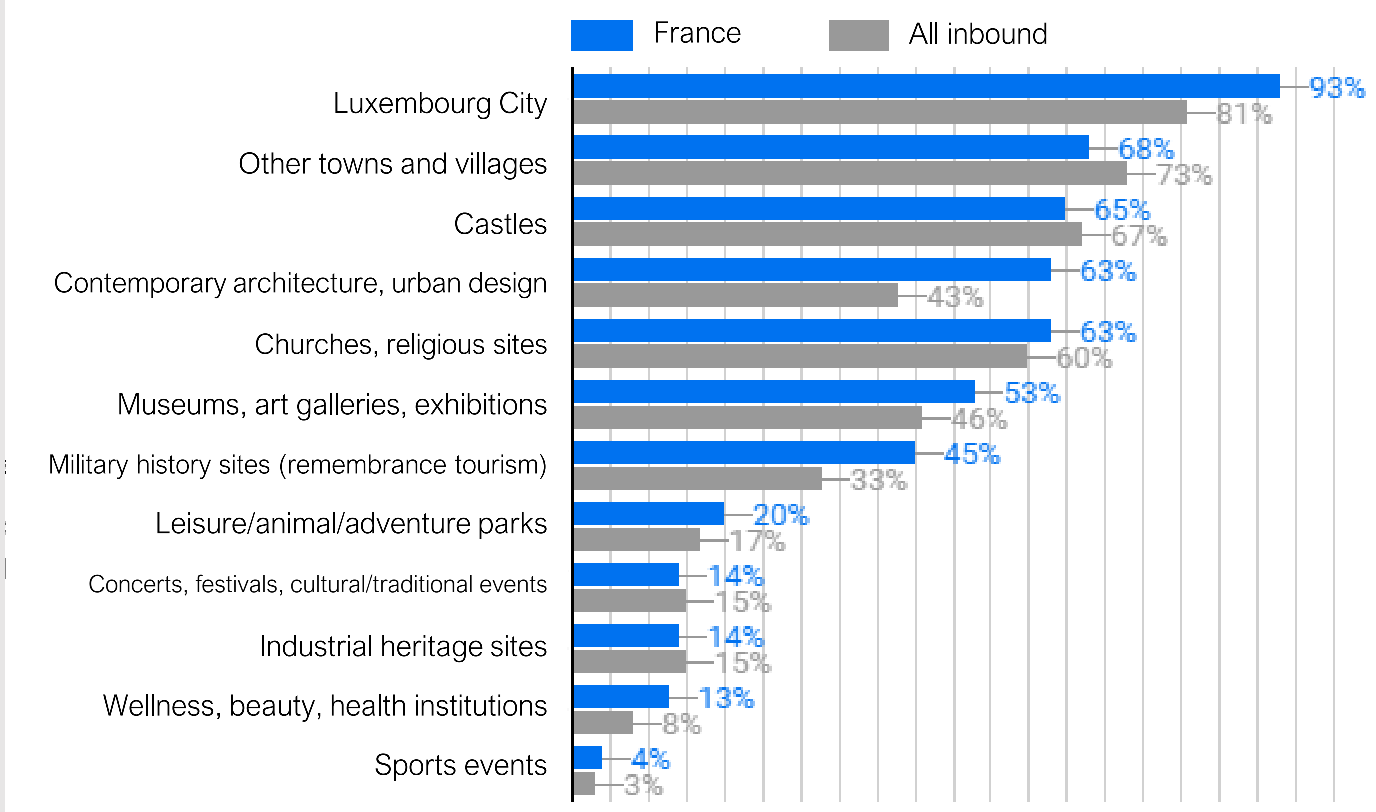
Inbound leisure visitors with overnight, 2020-2022



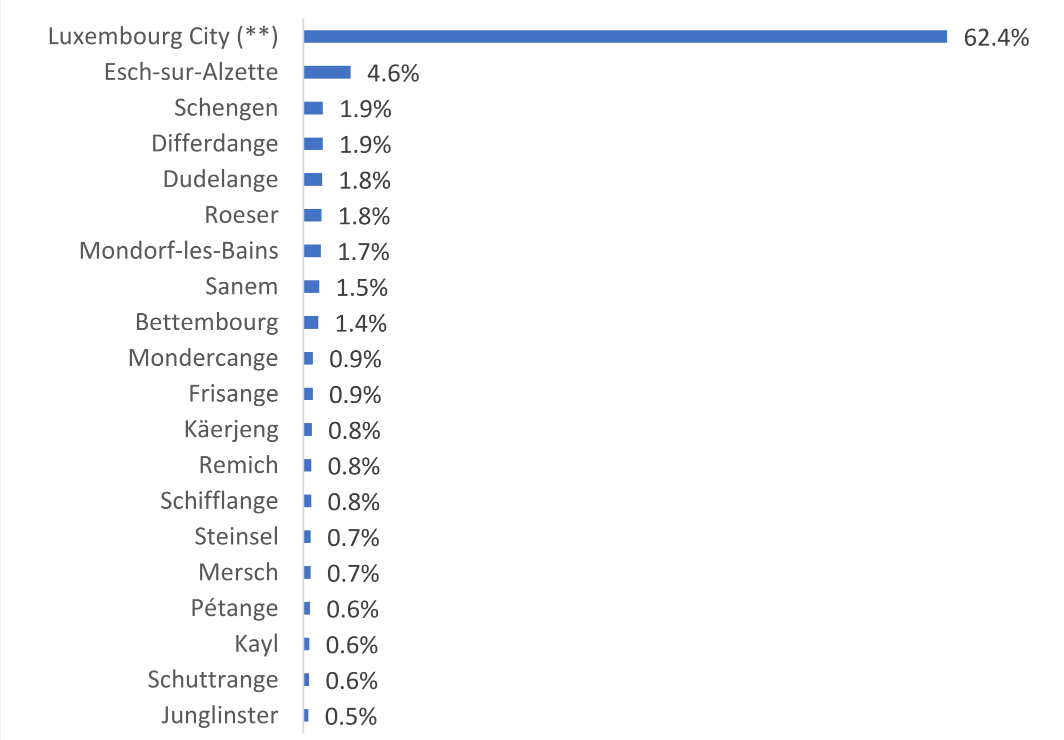
Source: LFT/Ilres Visitor Survey, 2020-2022.

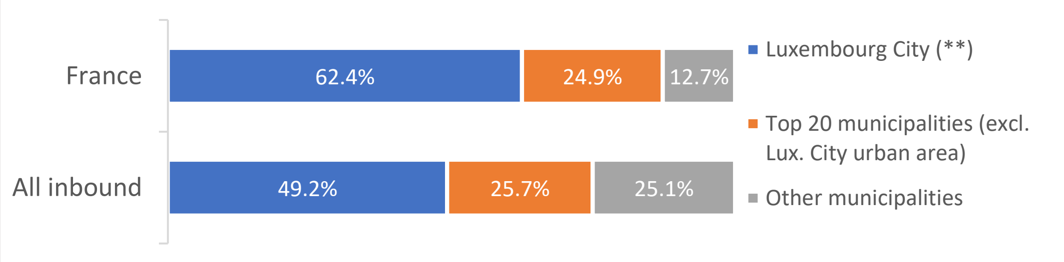
Type of places and cities visited in Luxembourg

Places visited during leisure overnight stays[1]



Top cities visited during French overnight and same-day trips[2] (*), 2022



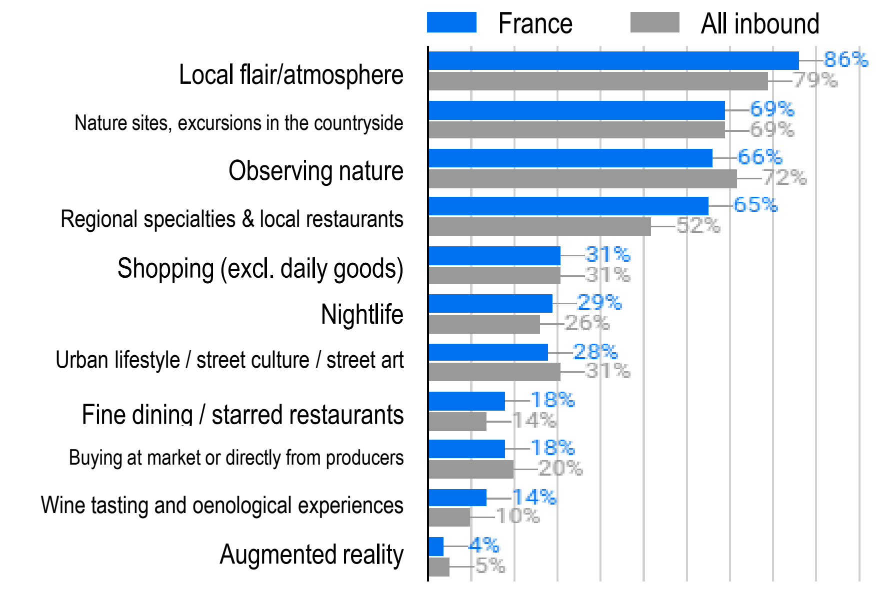


Sources: [1] LFT/Ilres Visitor Survey, 2020-2022, [2] Mobile phone data (Editus/LFT).
(*) In the case of overnight trips : includes city where night is spent. Includes all cities with at least 1 hour of visit.
(**) Urban area, incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange).

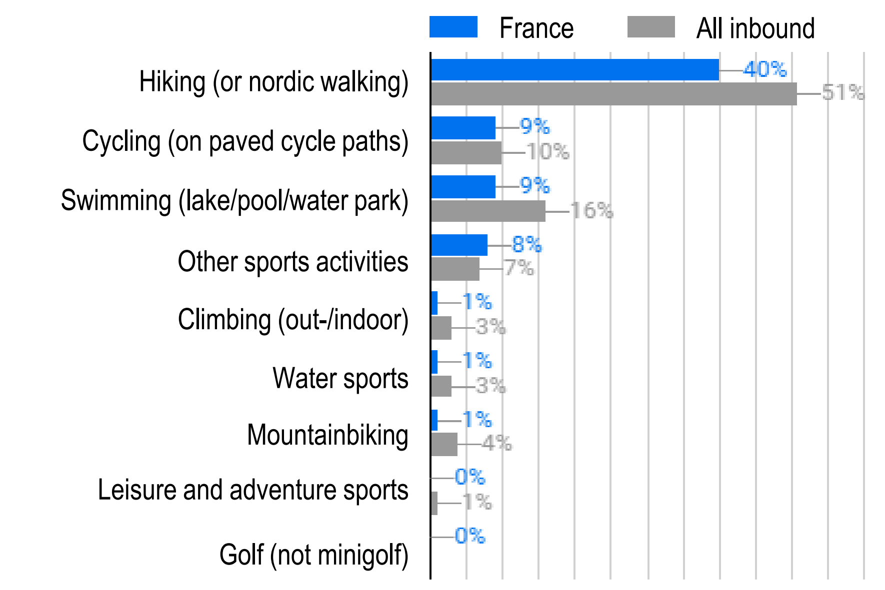
Activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2020-2022

Non-sporting activities



Sporting activities

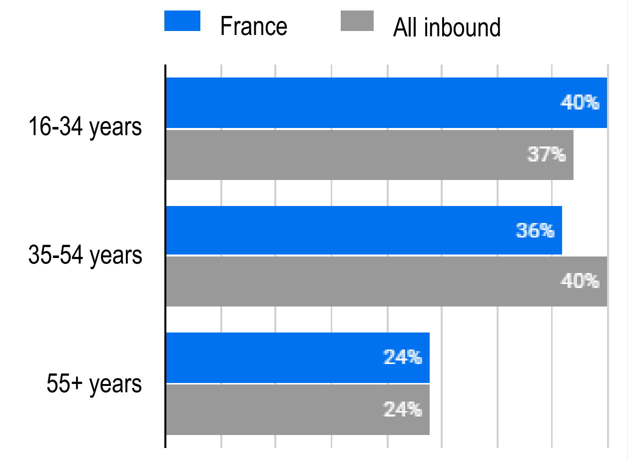


Source: LFT/Ilres Visitor Survey, 2020-2022.

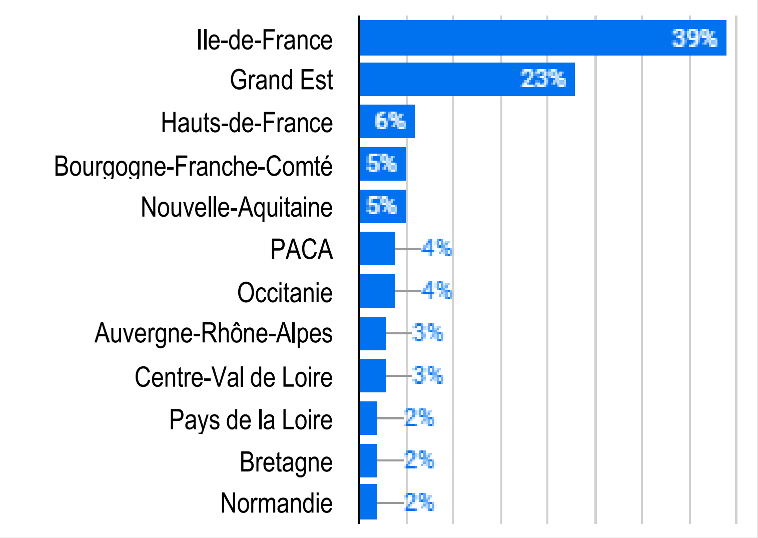
Transport, travel party, age, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2020-2022

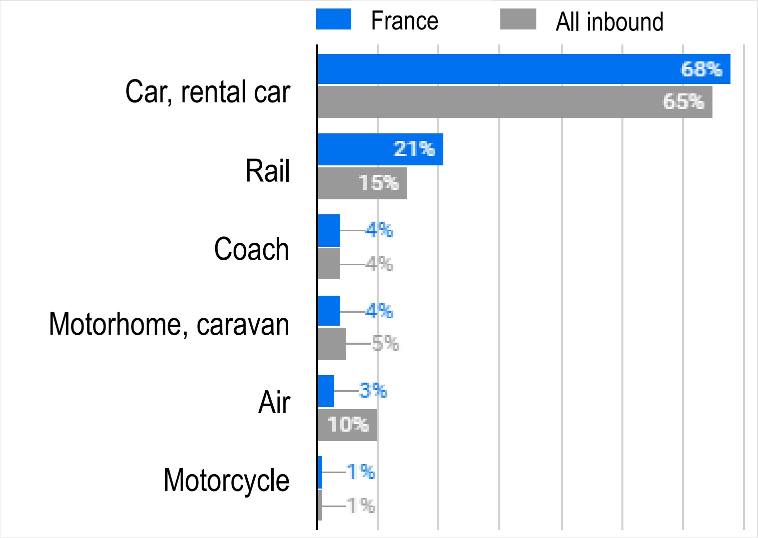
Age groups



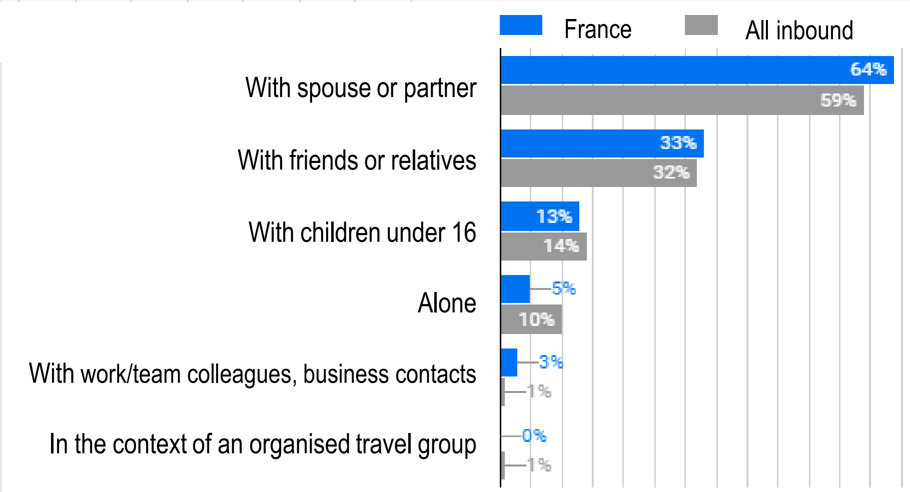
Region of origin



Mode of transport to access Luxembourg



Travel party



First-time visitors

63%
(All inbound 60%)

Visitors spending nights in Luxembourg and abroad during same trip

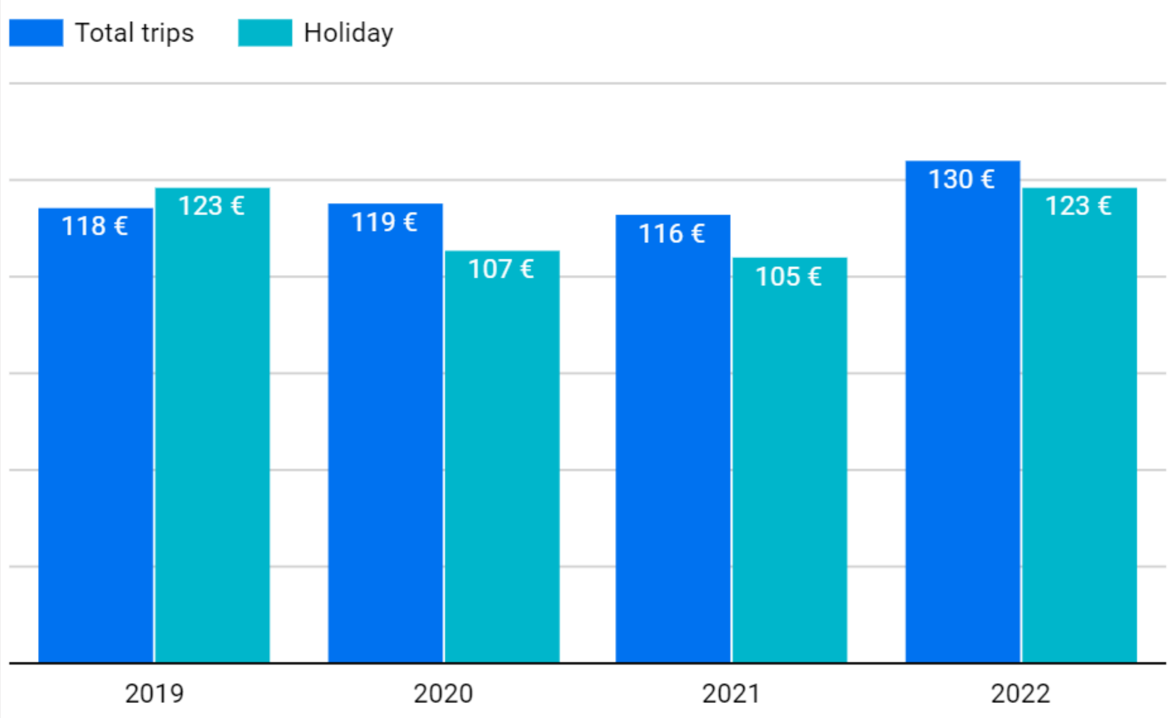
37%
(All inbound 37%)

Source: LFT/Ilres Visitor Survey, 2020-2022.

Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

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



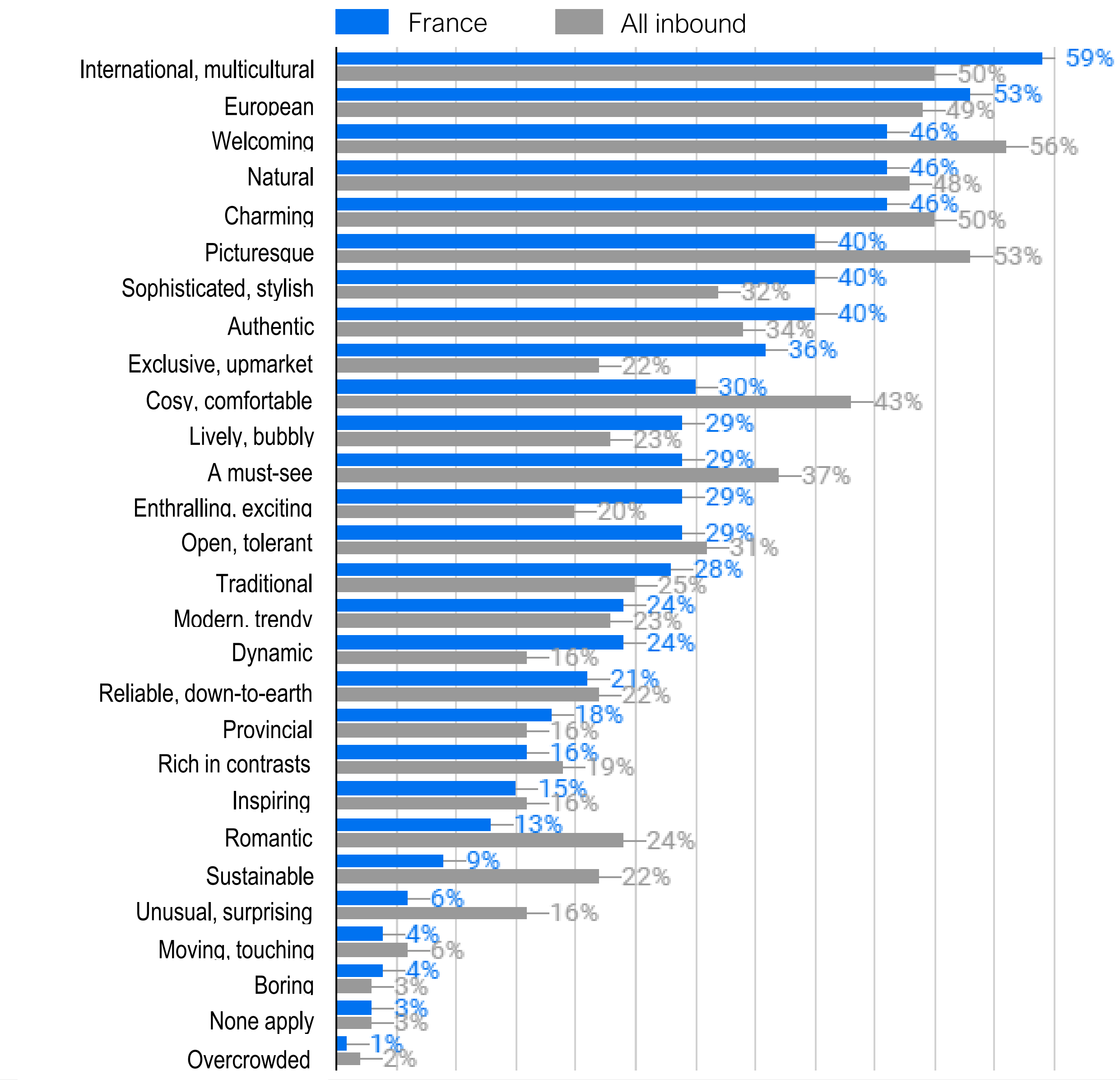
2022

	France to Luxembourg	Europe to Luxembourg
Spend/day/pers. on **all** trips	130 €	124 €
Spend/day/pers. on **holiday** trips	123 €	118 €

Source: World Travel Monitor/IPK International.

Image perception of Luxembourg

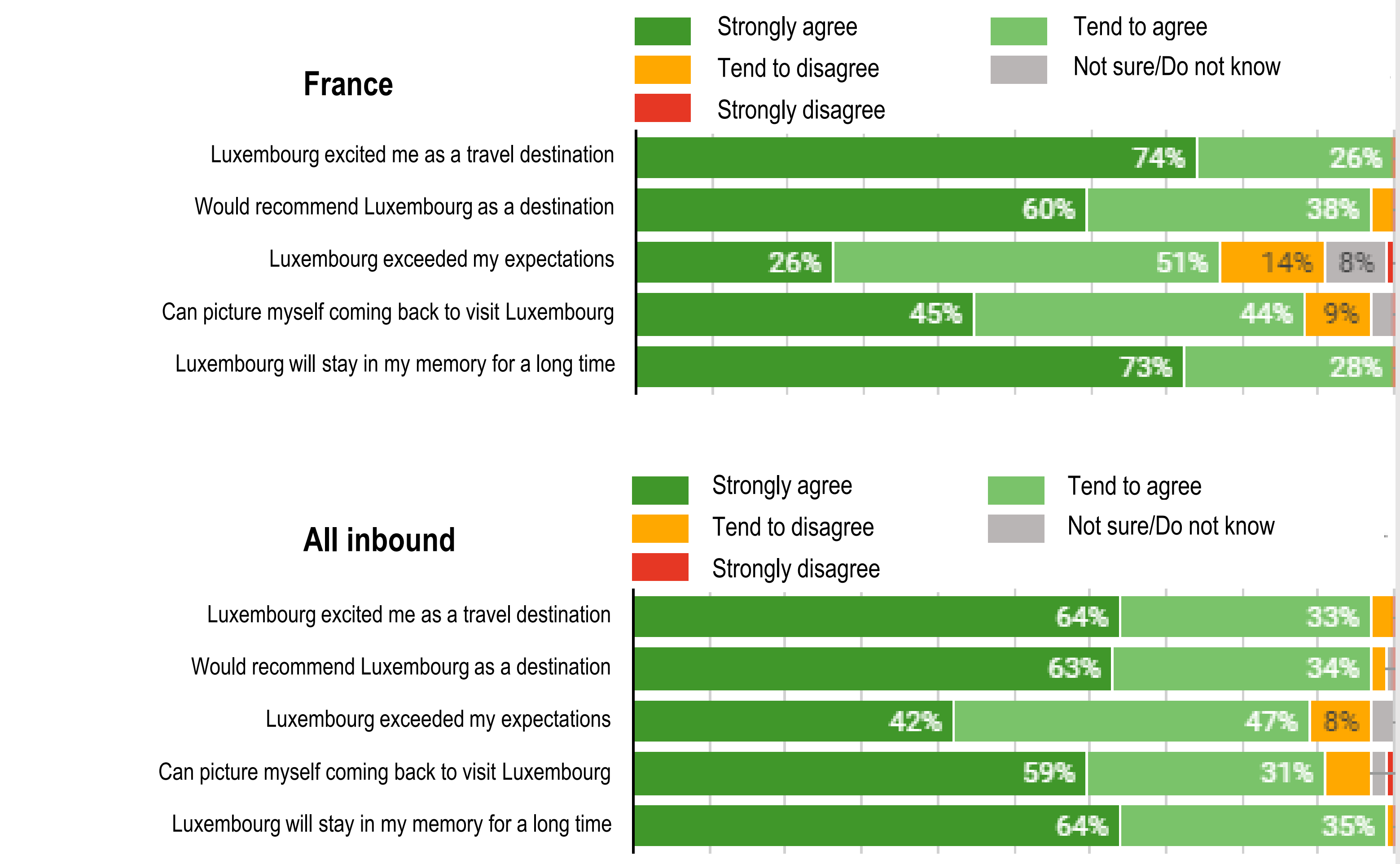
Leisure overnight visitors



Source: LFT/Ilres Visitor Survey, 2020-2022.

Visitor satisfaction and recommendation

Inbound leisure visitors, 2020-2022

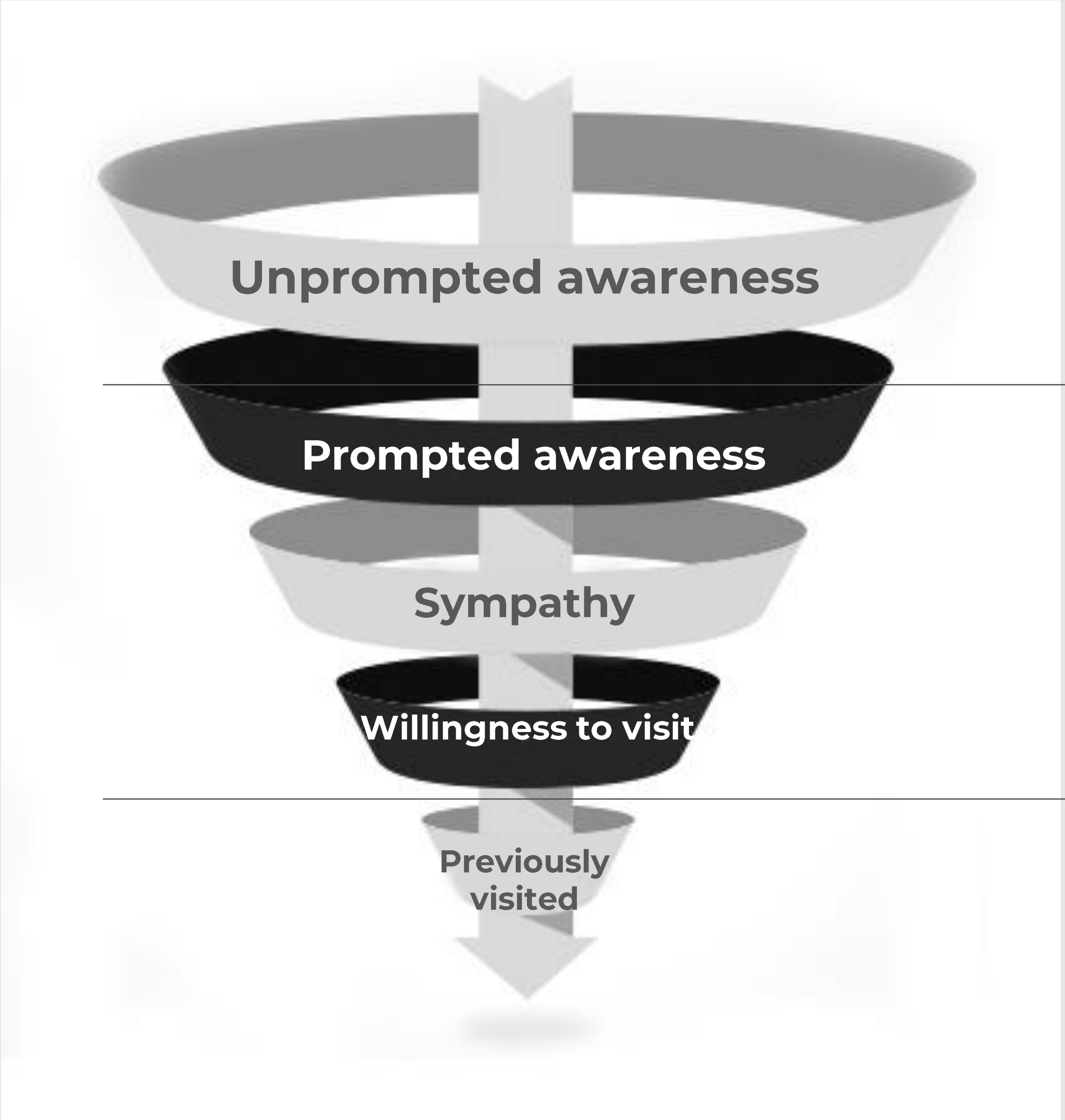


Source: LFT/Ilres Visitor Survey, 2020-2022.

Target segments,
Brand & Growth Potential

Brand Funnel 2021-2022

Assessing Luxembourg's brand strength as a destination



Unprompted awareness	1.3%	1.5%
Prompted awareness	79%	80%
Sympathy	43%	49%
Willingness to visit	25%	25%
Previously visited	14%	20%

Total future visitor potential from France (*)

12.2 million

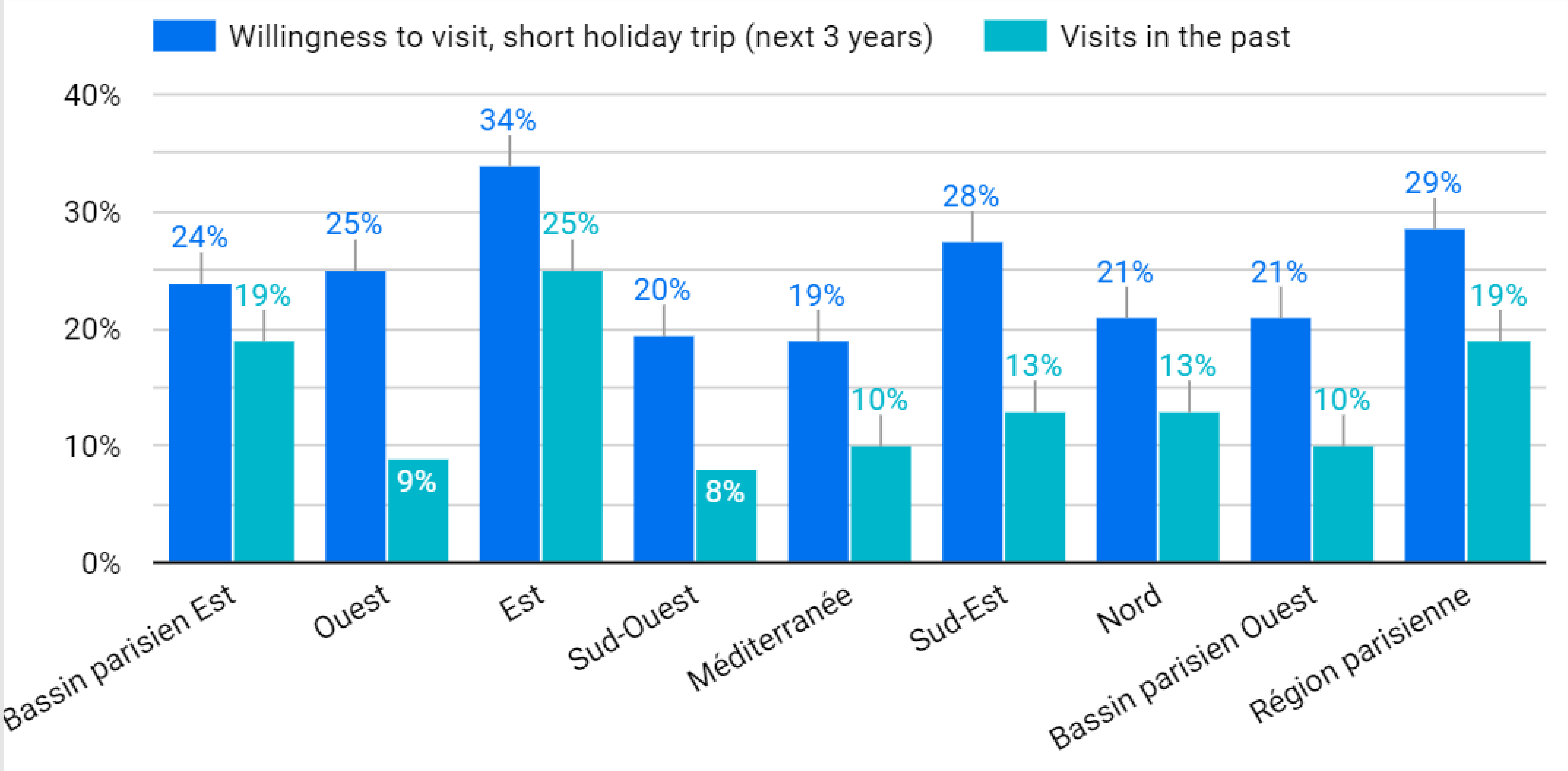
Highest future travel intent from France (**)

1. Perfection Seekers
2. Leisure Oriented
3. Explorers

Source: Destination Brand/Inspektour.
(*) 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: Destination Brand/Inspektour.

General theme interest (*)

Theme	EU Rank	FR Rank	FR % interested
Resting/Relaxation	1	1	71%
Culinary	2	2	69%
City	4	3	67%
Culture	6	4	61%
Castles	5	5	58%
History/Unesco	7	6	54%
Nature	3	7	53%
Hiking	8	8	50%
Family	11	9	50%
Events	14	10	49%
Nightlife (**)	12	11	46%
Wellness	13	12	44%
Sustainability	9	13	42%
Wine	16	14	41%
Countryside	15	15	40%
Shopping	10	16	39%
Industrial heritage	19	17	36%
Active-sports	18	18	34%
Camping	20	19	33%
Cycling	21	20	29%
Luxury	17	21	25%
MTB	22	22	25%
Voluntary work	24	23	19%
Motorcycling	23	24	15%

(*) 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: Destination Brand/Inspektour.

Luxembourg‘s Theme Competence (*)

Theme	(EU) Rank	(FR) Rank	(FR) % agreeing
City	1	1	49%
Shopping	5	2	42%
Resting/Relaxation	2	3	41%
Culture	4	4	41%
Castles	3	5	37%
Nightlife	11	6	33%
Culinary	6	7	33%
Nature	7	8	31%
Industrial Heritage	19	9	31%
Cycling	13	10	30%
History/Unesco	8	11	30%
Wellness	9	12	30%
Family	14	13	29%
Sustainability	12	14	29%
Active-sports	18	15	28%
Hiking	10	16	27%
Wine	16	17	27%
Countryside	17	18	26%
Camping	15	19	25%
MTB	20	20	24%

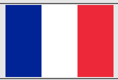
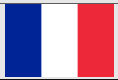
Growth potential for themes (**)

- Culinary & Wine
- History/Unesco
- 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: Destination Brand/Inspektour.

Luxembourg’s Brand Value Ratings (*)

Feature			
	Rank	**Rank**	% agreeing
Open-minded, tolerant	3	**1**	34%
Authentic	1	**2**	34%
Welcoming, hospitable	2	**3**	33%
Attractive, appealing	4	**4**	32%
Lively, hip	9	**5**	32%
Lot of variety, diversified	6	**6**	31%
Not crowded, insider tip	8	**7**	30%
Service-oriented	7	**8**	29%
Surprising	5	**9**	29%
Sustainable	10	**10**	26%

(*) 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: Destination Brand/Inspektour.

Spontaneous associations with Luxembourg

Source: Destination Brand/Inspektour.

LFT strategic market focus

Market priorisation

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

Theme & segment focus

Theme	Priority	Marketing	Segments
Culinary +Wine	2	Image & Activating	PS, SB, EXP
Nature	1	Image	EXP, PS, (NLA)
Hiking	2	Image	EXP, NLA
Culture (+Events)	1	Image & Activating	PS, SB, EXP
City	2	Activating	EXP, SB
Castles	3	Image	NLA, EXP
Wellness	4	Image	EXP, SB
Sustainability	3	Image	EXP, NLA
Cycling	4	Activating	PS
Industrial Heritage	2	Image	PS, SB

Brand Value focus

Theme	Priority	Segments
Sustainable	1	EXP SB (NLA)
Surprising	2	
Welcoming	3	
Lot of variety	3	
Not crowded/insider tip	3	
Service-oriented	3	

Your contact

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