



Luxembourg for Tourism

Market profile

GERMANY

2022



Economic indicators & General Travel Demand

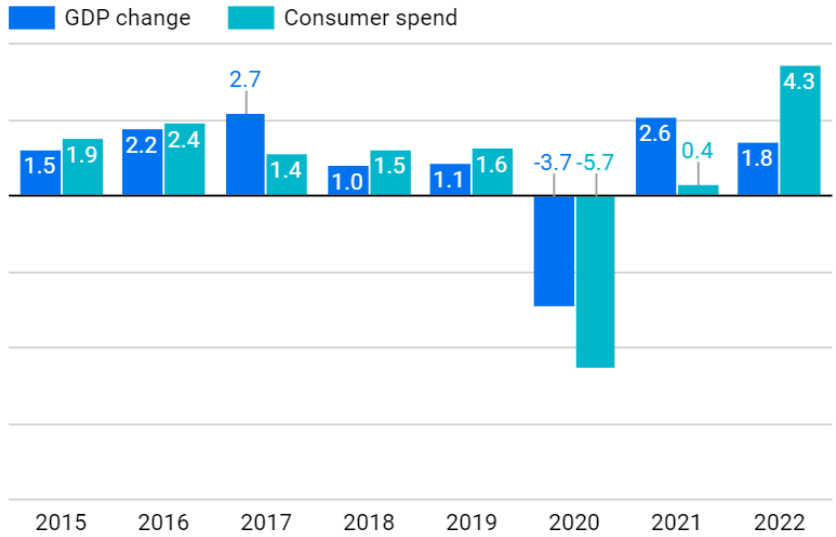
Economic indicators – General travel demand



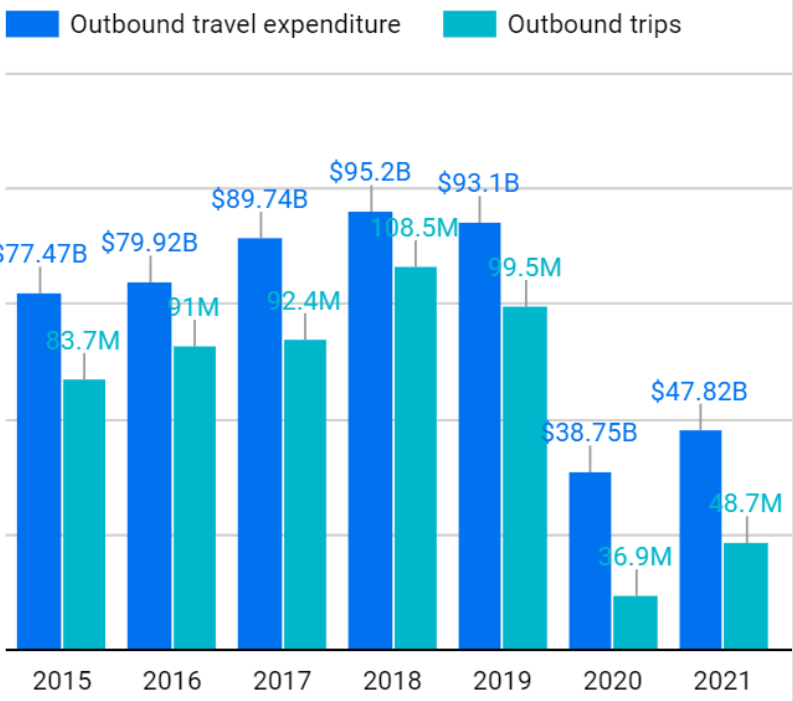
Economy & population

GDP (PPP) per capita **\$53,765** Unemployment (%) **3.4** Population (mn) **83.5** Inflation (%) **6.9**

GDP and Consumer spending, % annual change



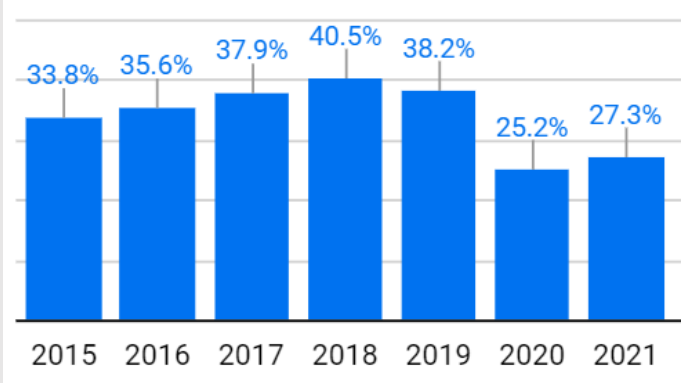
Outbound trips and travel expenditure



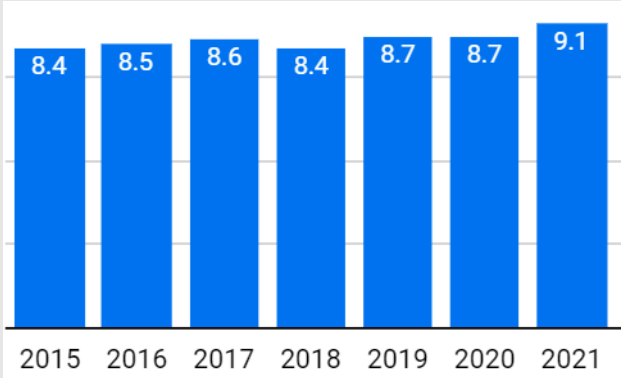
Average spend per outbound trip (2019)
935 \$

Outbound travel intensity
1.20 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)
90.3%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2022

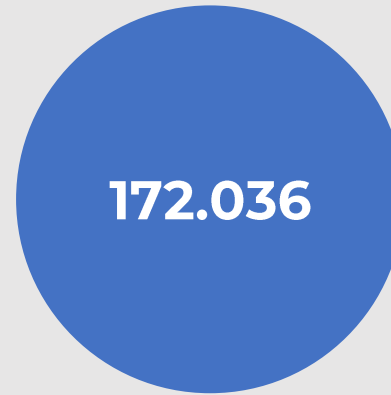


**Nights,
paid accommodation, 2022**



+37% (vs. 2021)
+23% (vs. 2019)

**Arrivals,
paid accommodation, 2022**



+50% (vs. 2021)
+15% (vs. 2019)

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



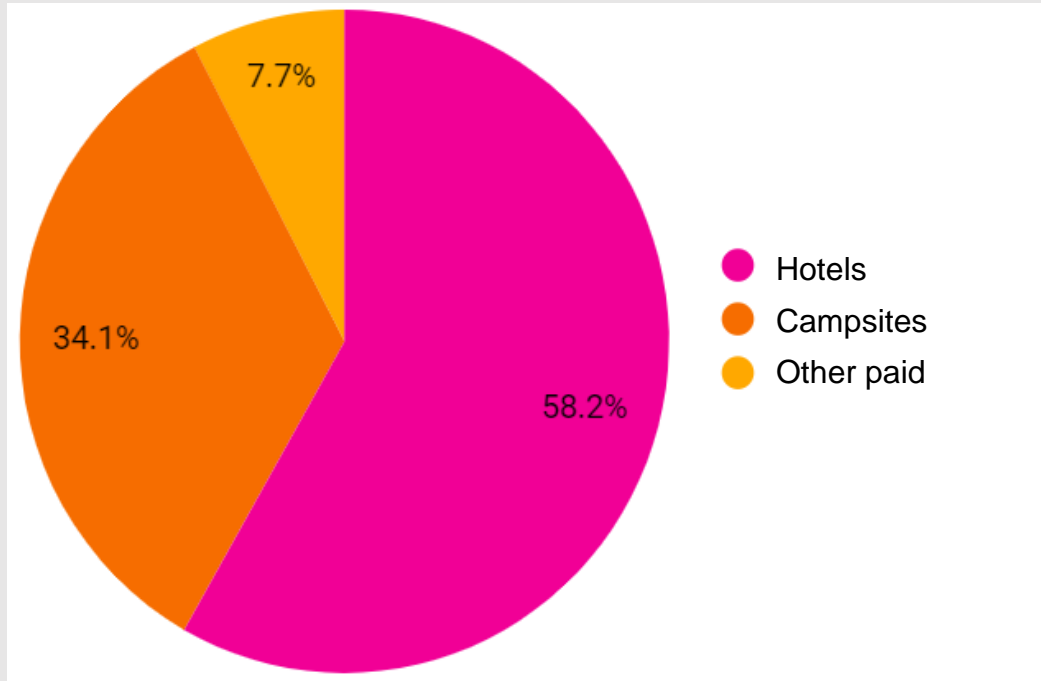
-0.22 days (vs. 2021)
+0.14 days (vs. 2019)

Nights & arrivals in paid accommodation

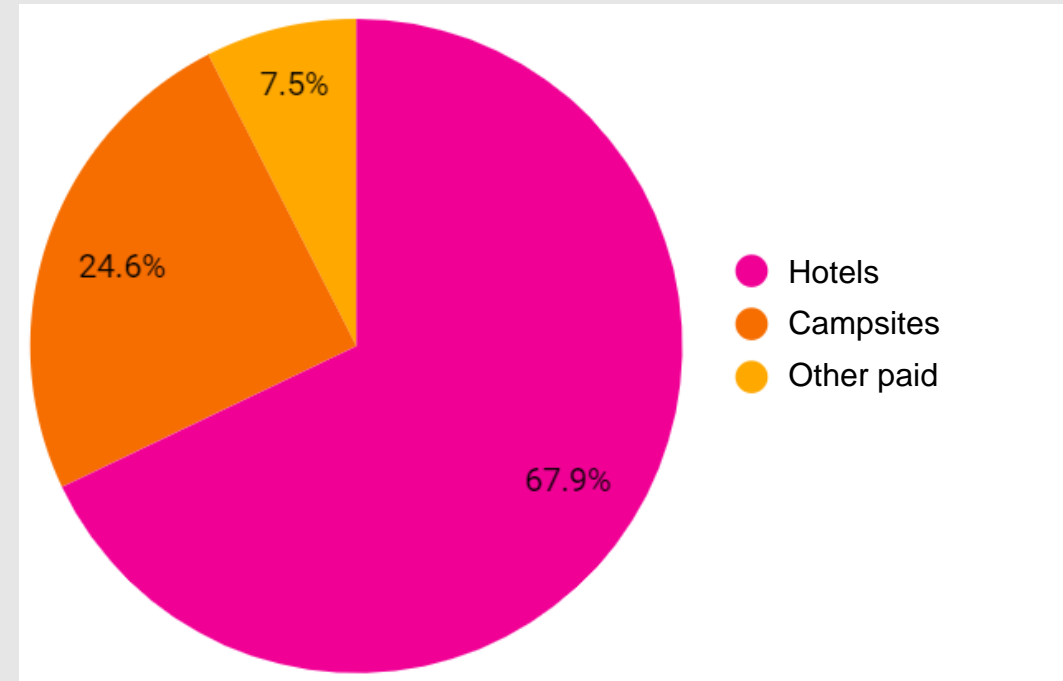
Type of accommodation, 2022



Nights, paid accommodation



Arrivals, paid accommodation



Hotels	222.723	+3% (vs. 2019)
Campsites	130.633	+100% (vs. 2019)
Other paid	29.271	-1% (vs. 2019)

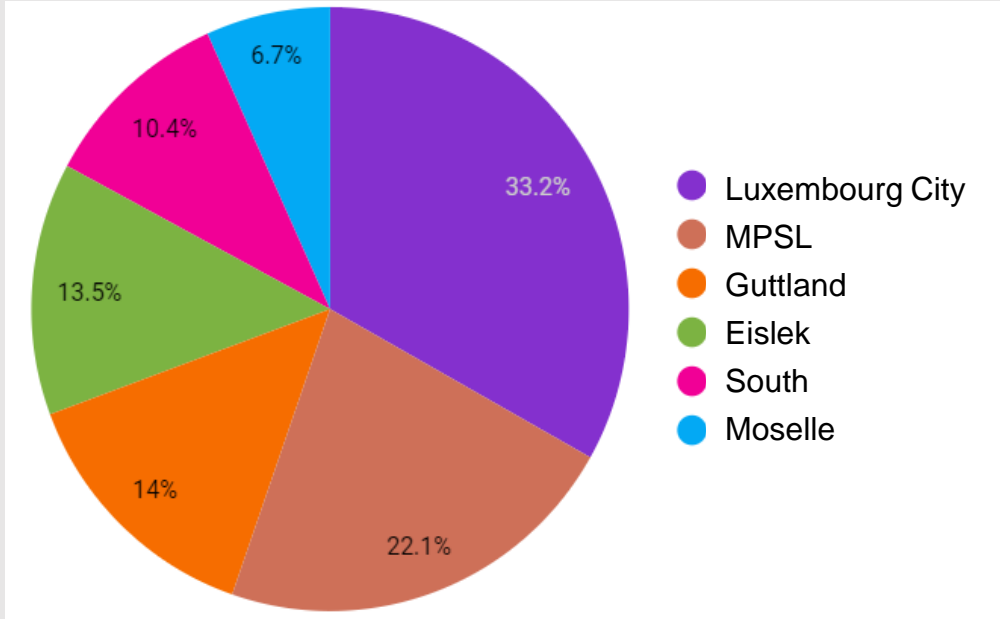
Hotels	116.846	-2% (vs. 2019)
Campsites	42.281	+155% (vs. 2019)
Other paid	12.909	-4% (vs. 2019)

Nights & arrivals in paid accommodation

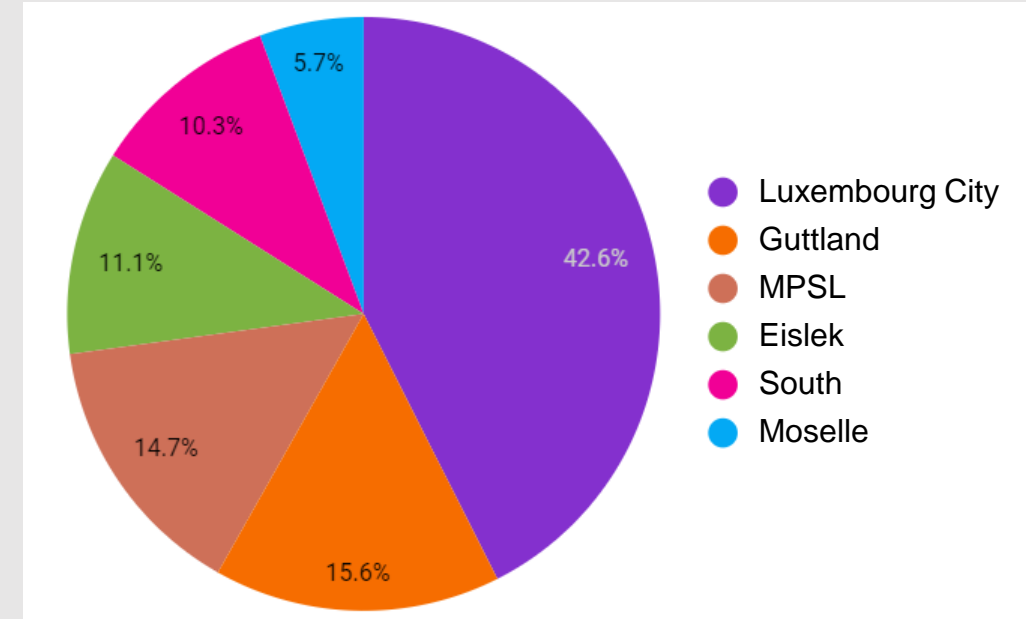
Regions, 2022



**Nights,
paid accommodation**



**Arrivals,
paid accommodation**



Luxembourg City	126.919	+4% (vs. 2019)
MPSL	84.735	+96% (vs. 2019)
Guttland	53.630	+47% (vs. 2019)
Eislek	51.747	+17% (vs. 2019)
South	39.826	+21% (vs. 2019)
Moselle	25.770	-19% (vs. 2019)

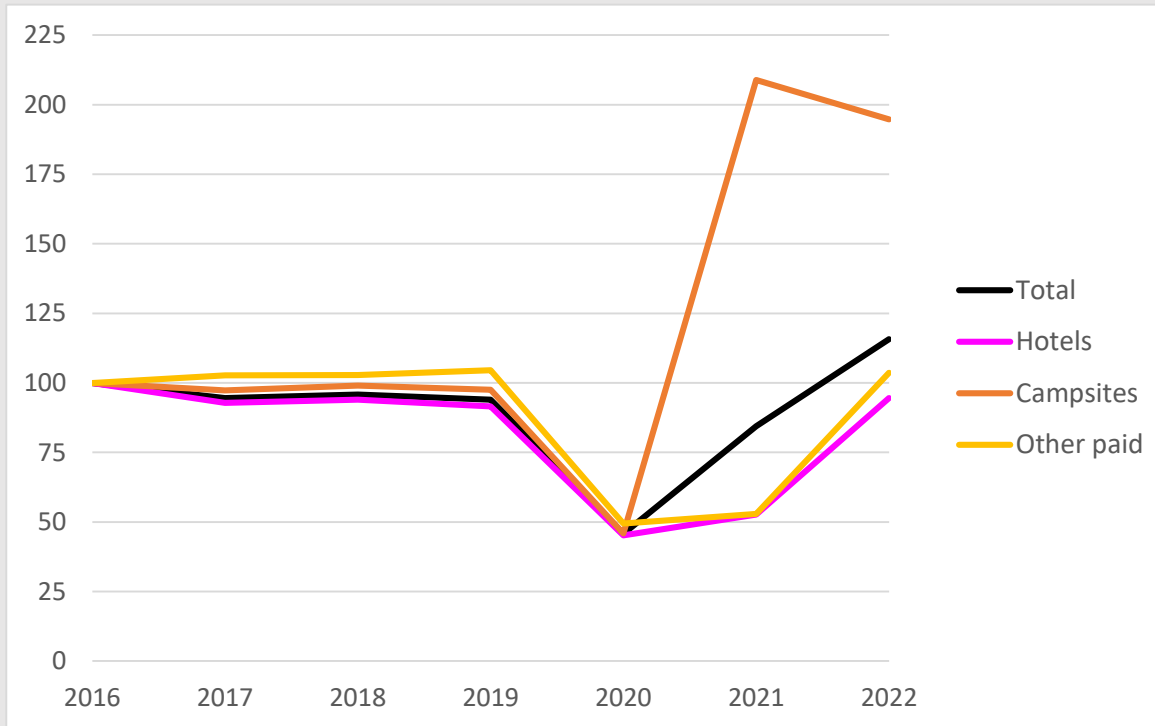
Luxembourg City	73.203	+2% (vs. 2019)
Guttland	26.887	+31% (vs. 2019)
MPSL	25.211	+59% (vs. 2019)
Eislek	19.148	+27% (vs. 2019)
South	17.798	+19% (vs. 2019)
Moselle	9.789	-13% (vs. 2019)

Nights in paid accommodation

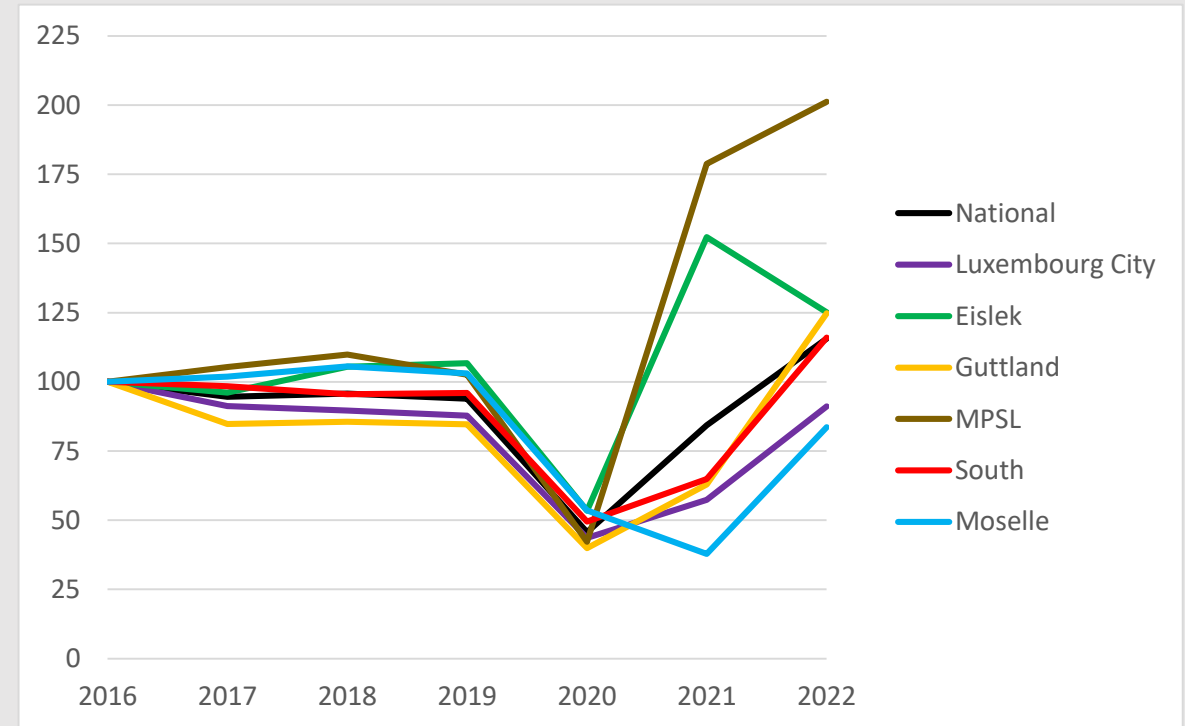
Total, Type of accommodation & Regions : Trends 2016-2022



2016 = Index 100



2016 = Index 100

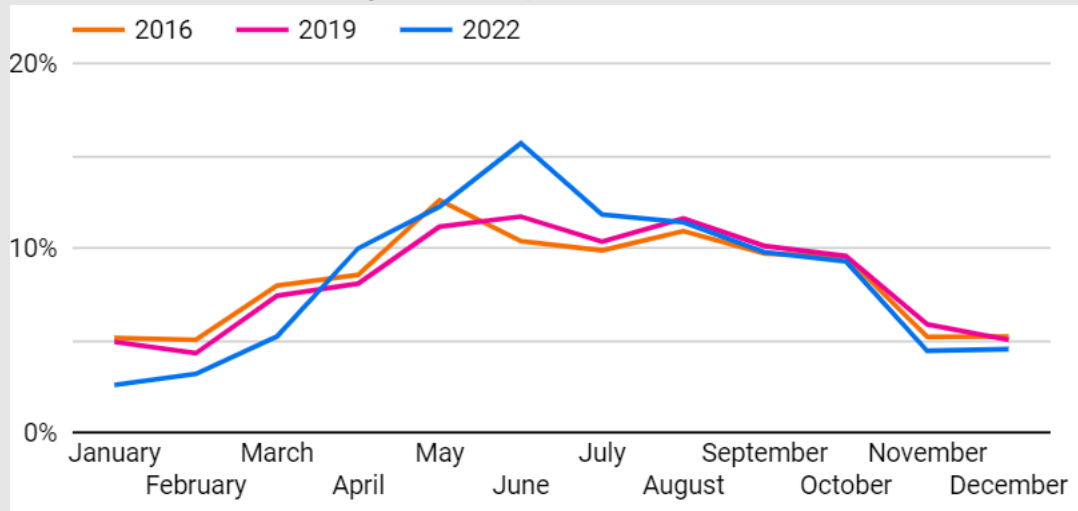


Nights in paid accommodation

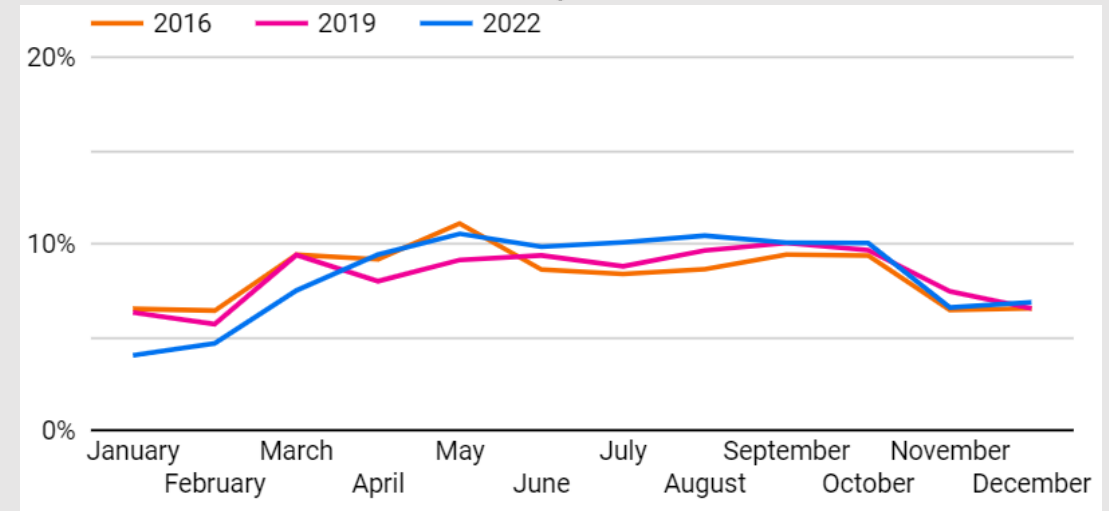
Seasonality



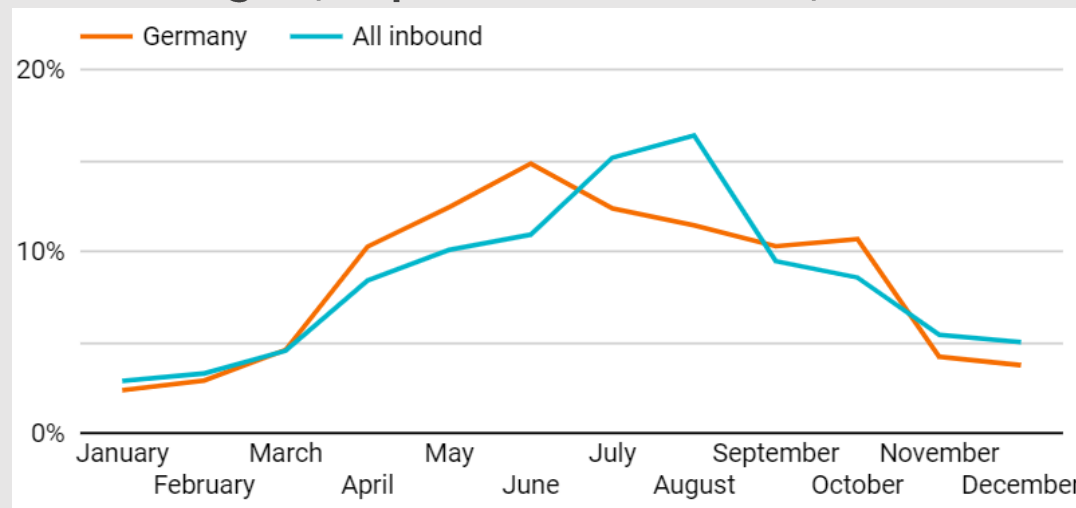
German nights, all paid accommodation



German nights, hotels



Nights, all paid accommodation, 2022



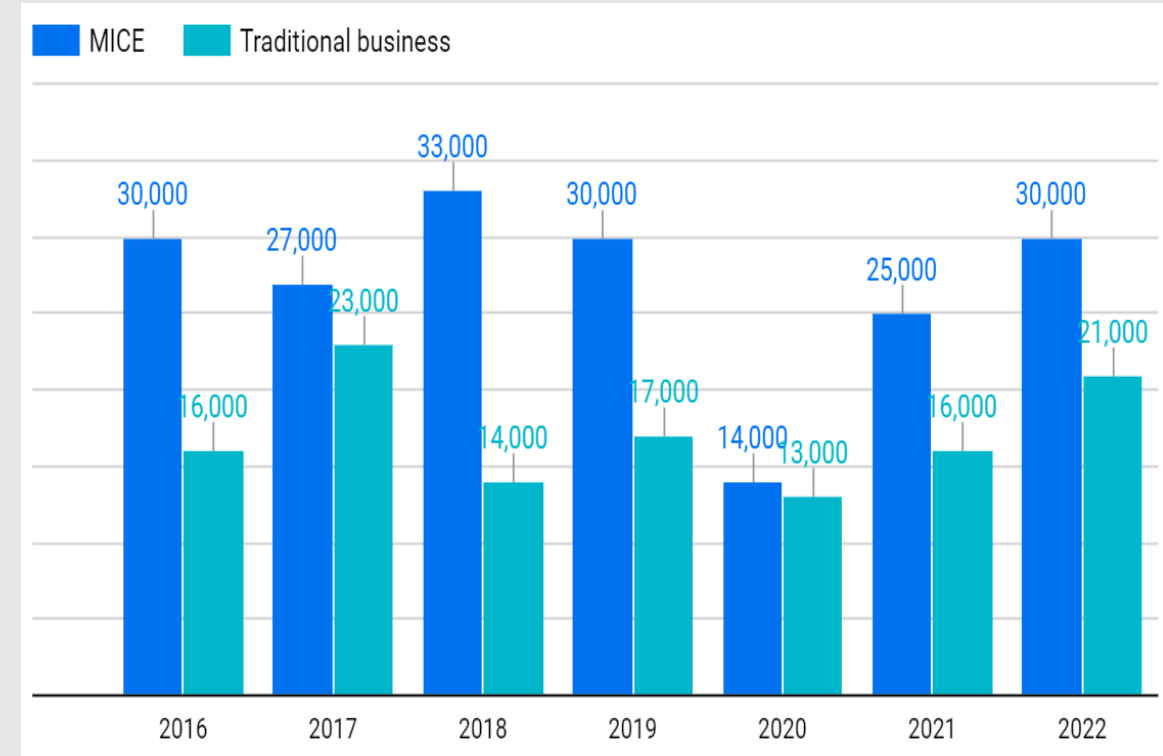
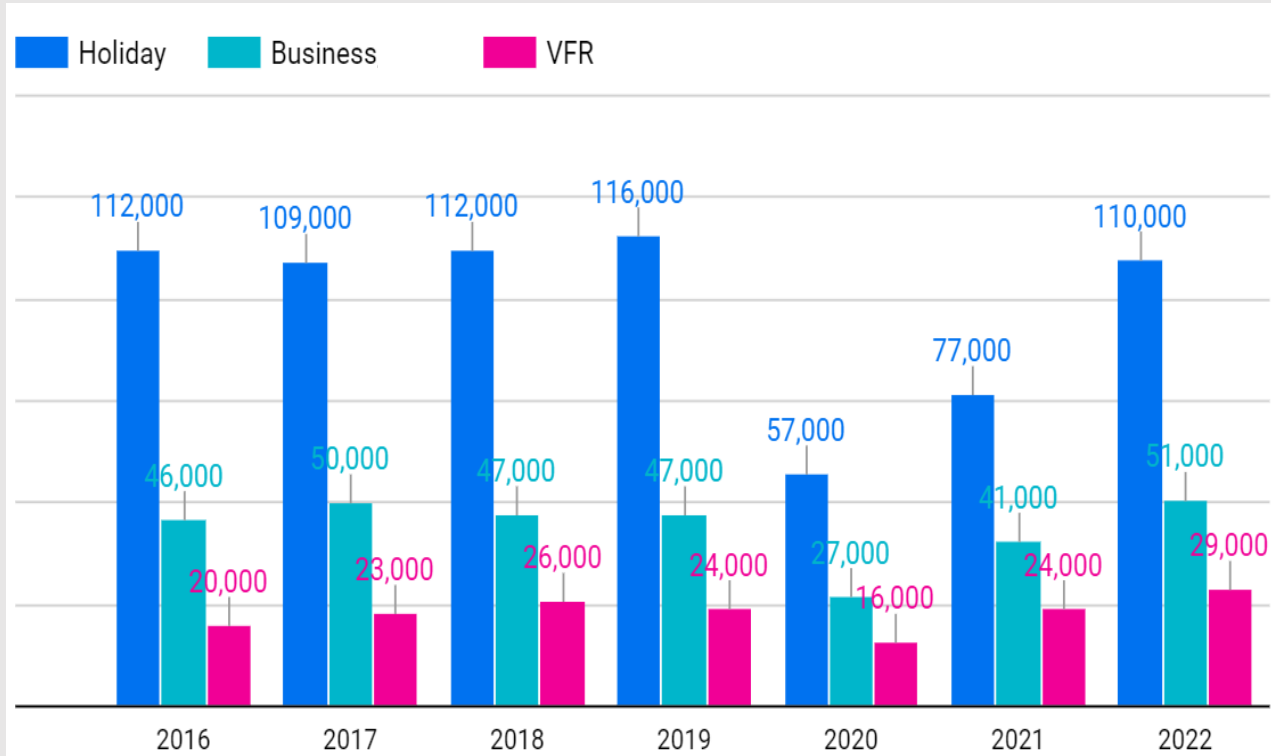


Characteristics of German inbound trips to Luxembourg

German trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

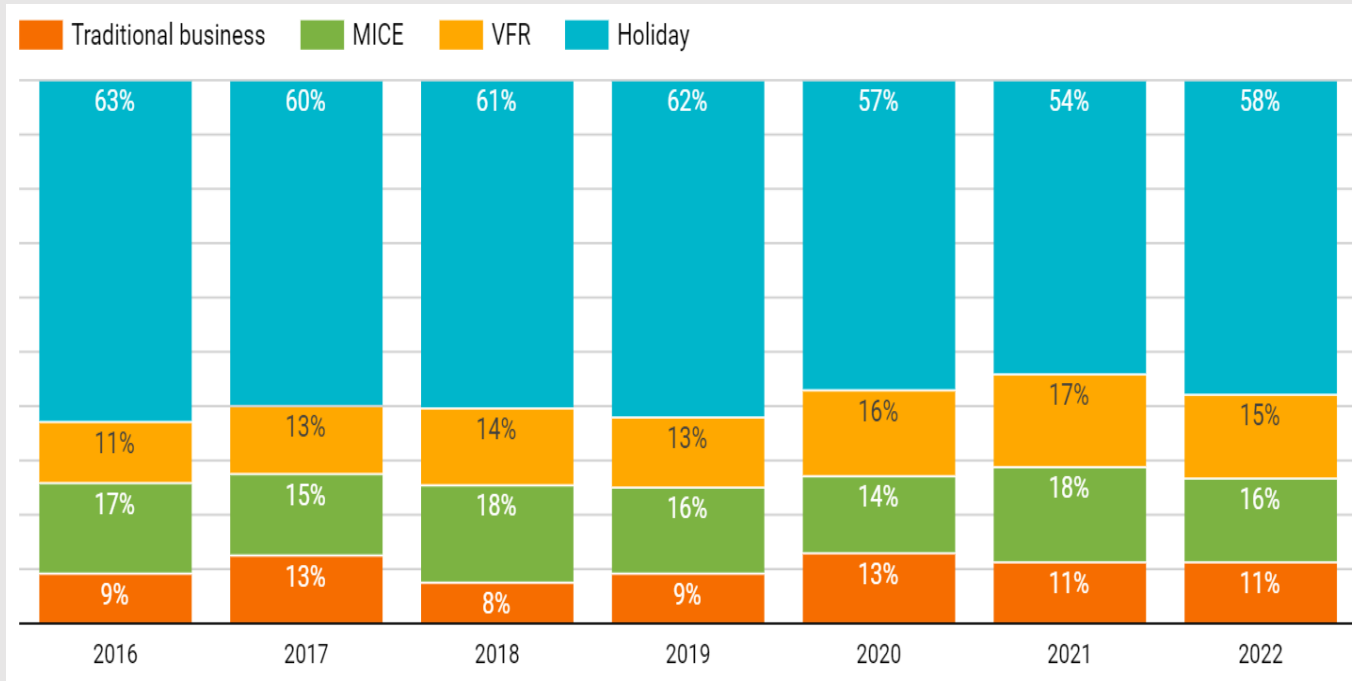


German trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

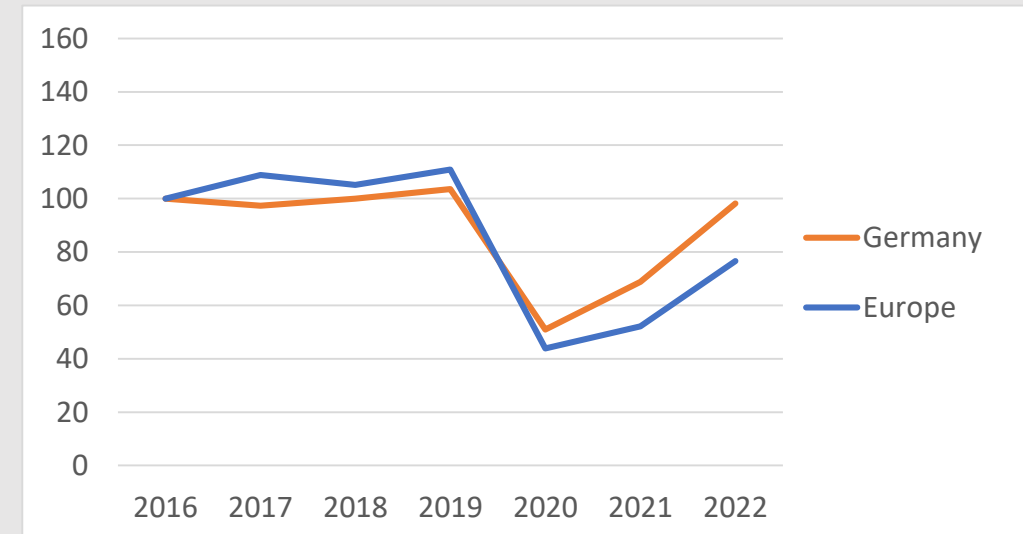
German trips to Luxembourg, 2016-2022



2022

	Germany to Luxembourg	Europe to Luxembourg
Holiday	58%	63%
VFR	15%	17%
MICE	16%	12%
Traditional Business	11%	8%

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



German same-day trips to Luxembourg

2022



Number of German same-day trips to Luxembourg

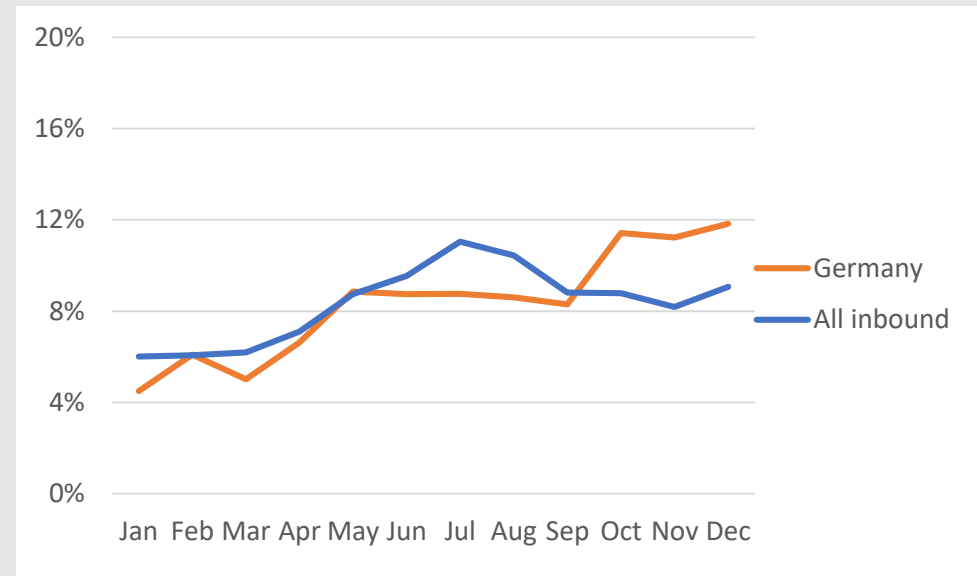
494.000
(18%
of inbound
same-day trips
to
Luxembourg)

+13% (vs. 2021)

Average length of same-day trips

6,8 h
(All
inbound
7,3h)

Seasonality of same-day trips, % monthly share





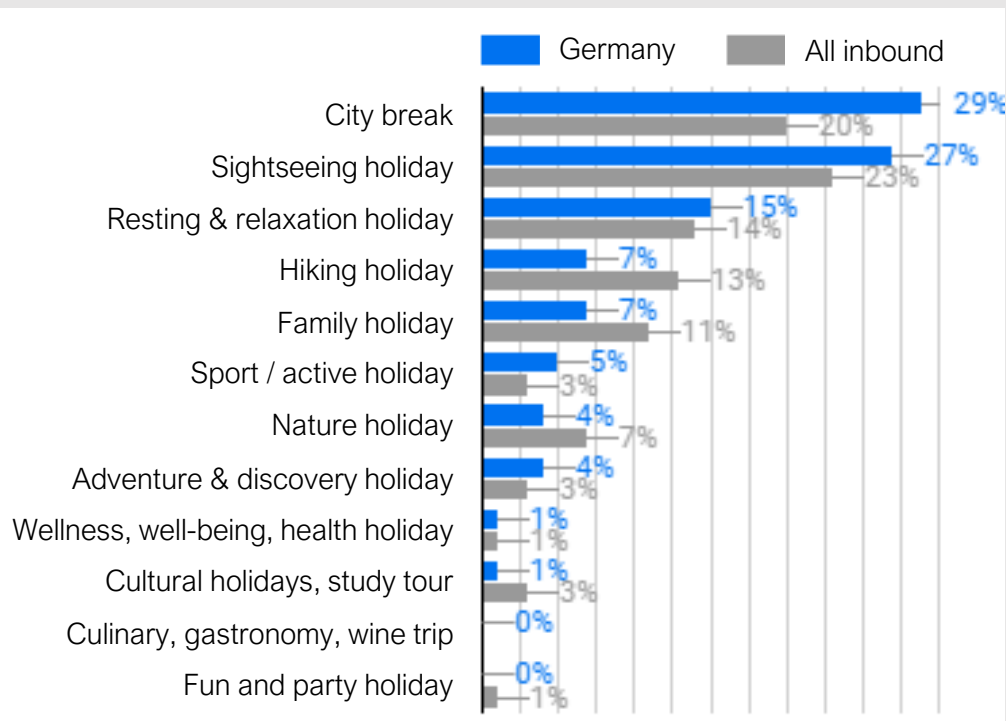
Travel behaviour of German leisure visitors in Luxembourg

Holiday types

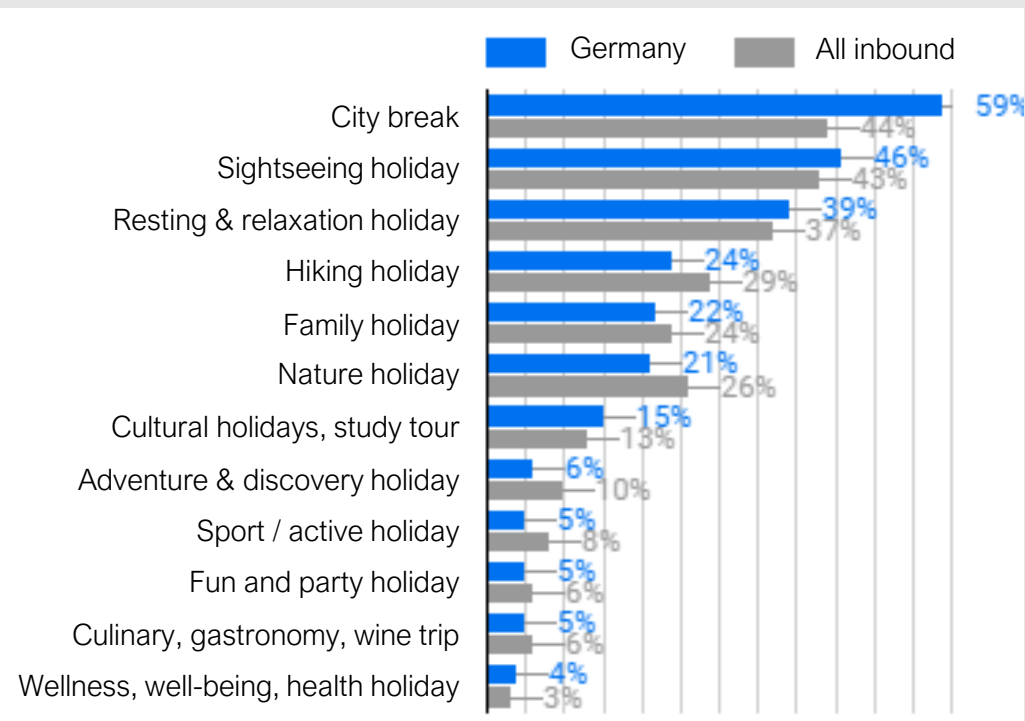
Inbound leisure visitors with overnight, 2020-2022



Main holiday types

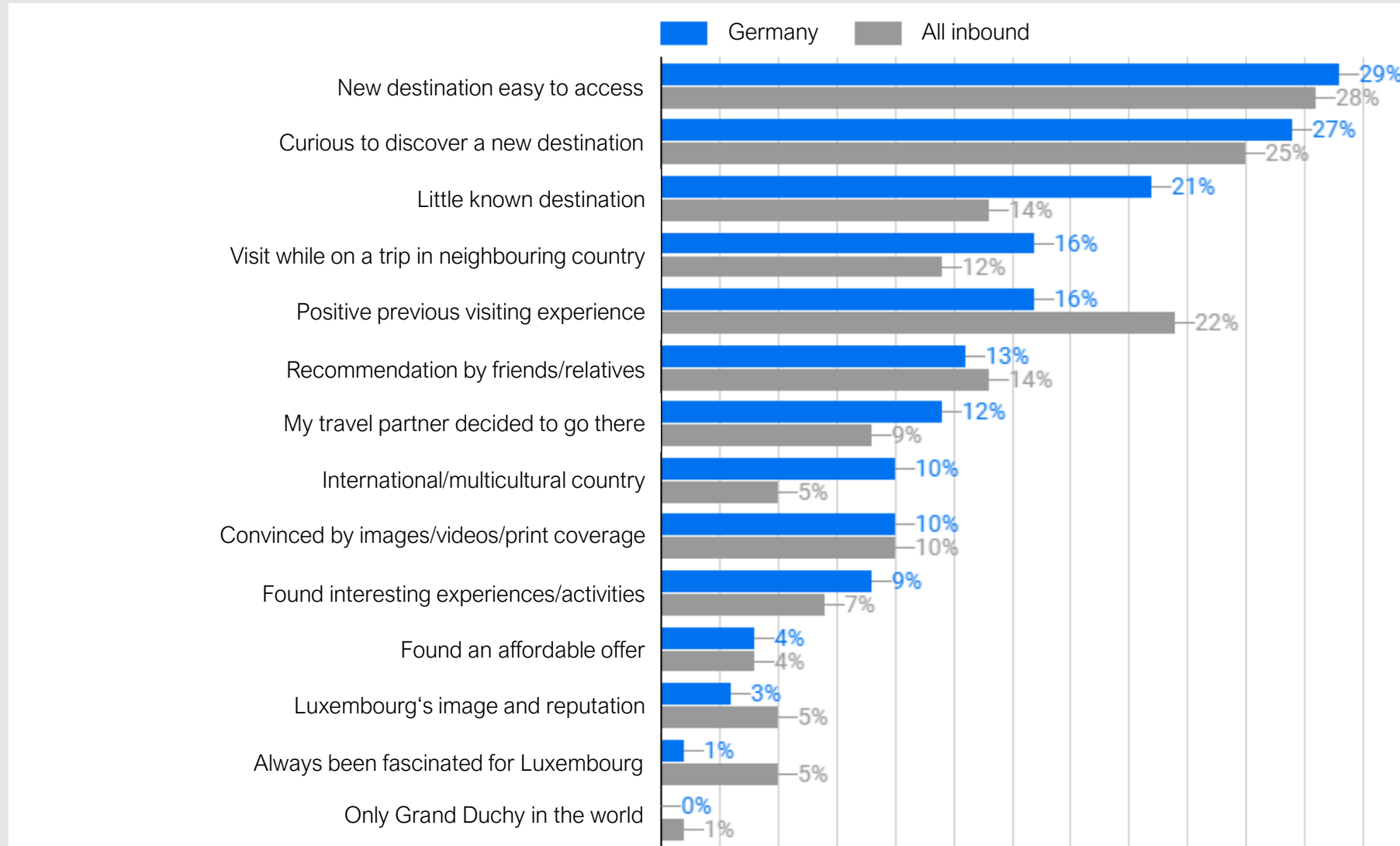


Additional holiday types



Key decision criteria for choosing Luxembourg

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

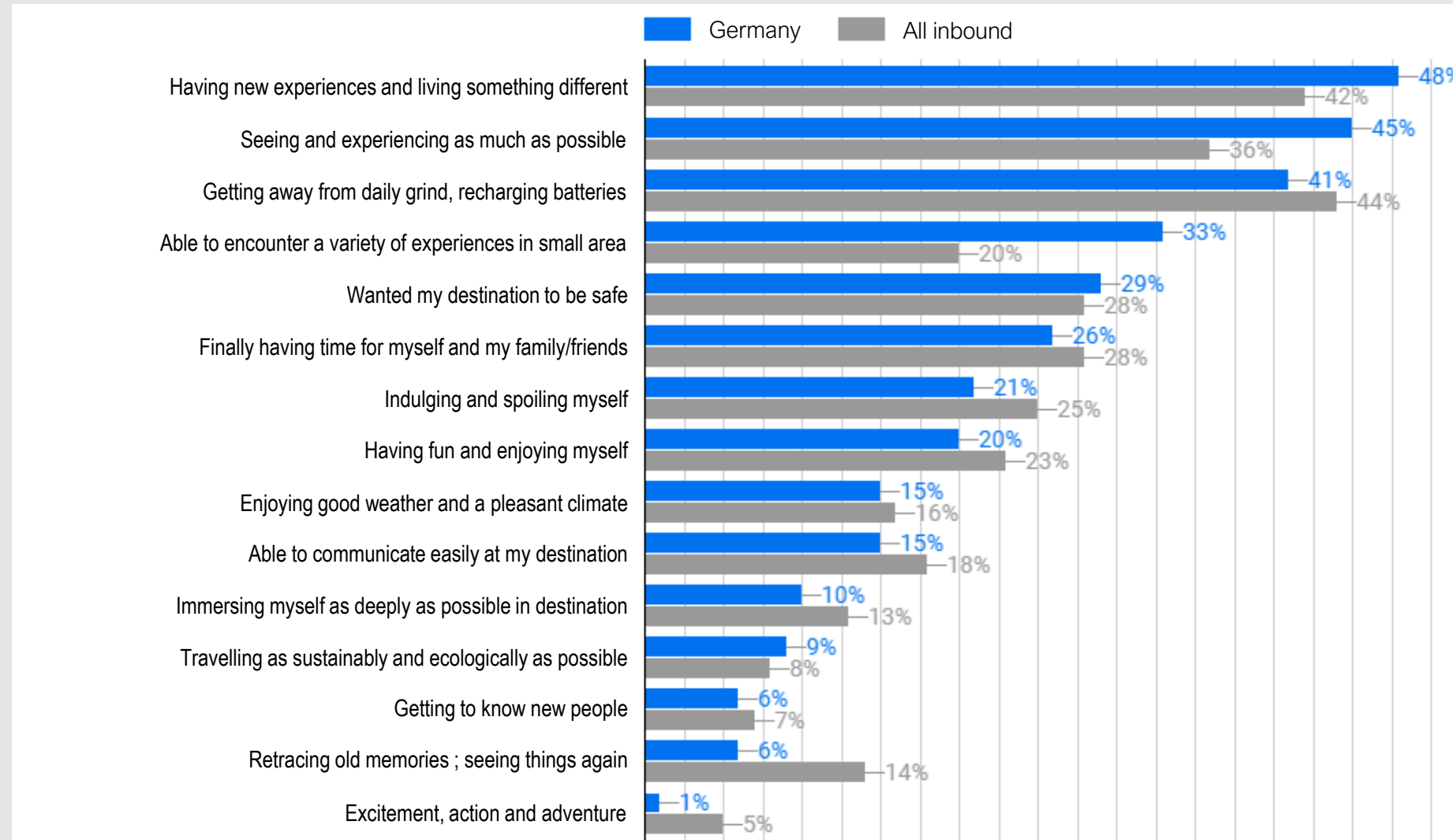


Source: LFT/Ilres Visitor Survey, 2020-2022.

(*) Maximum 3 answers possible.

Key travel motivations

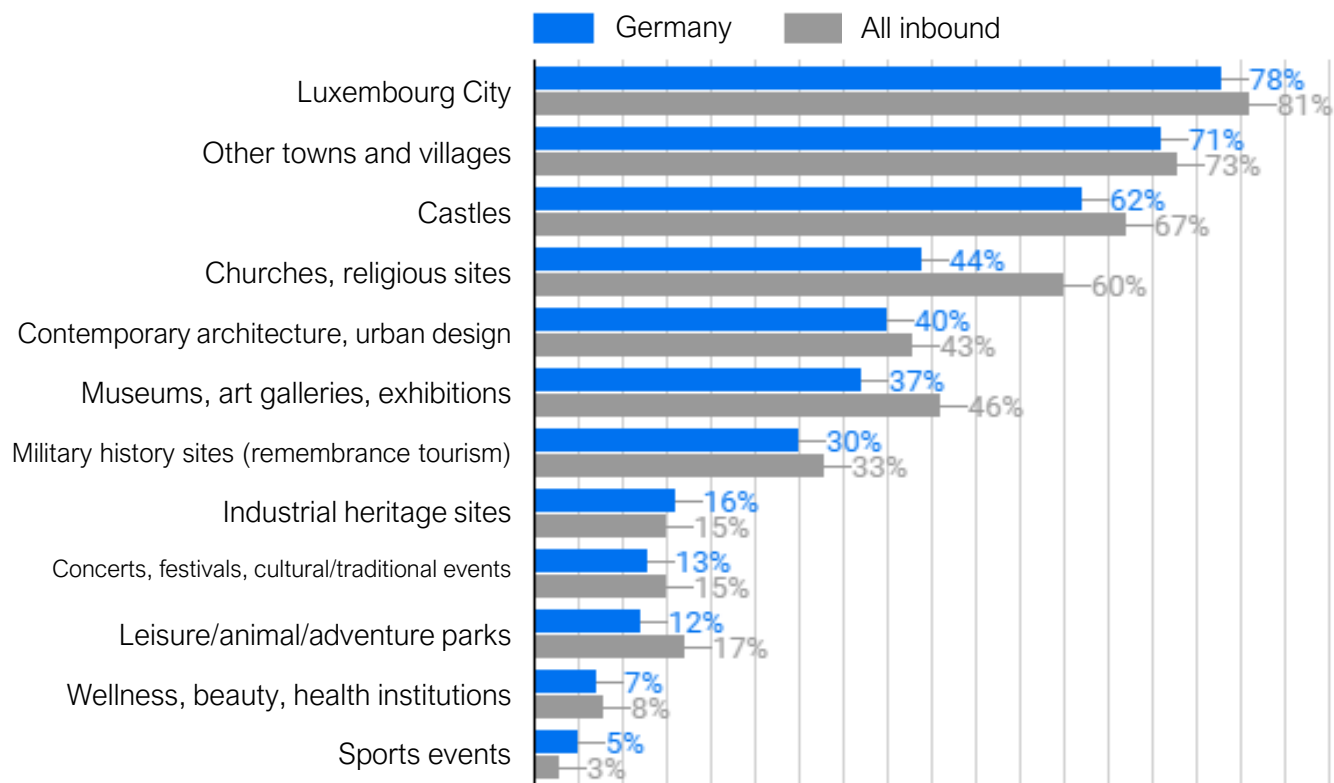
Inbound leisure visitors with overnight, 2020-2022



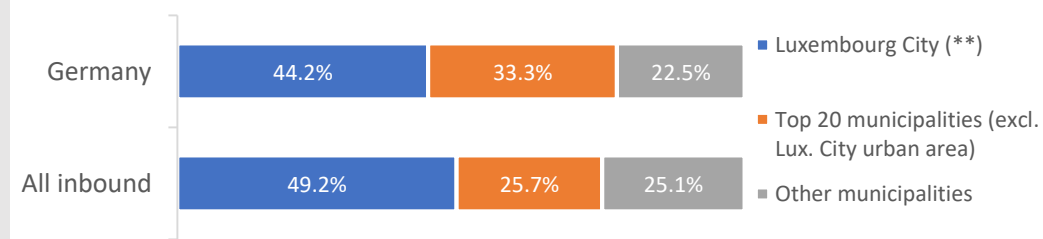
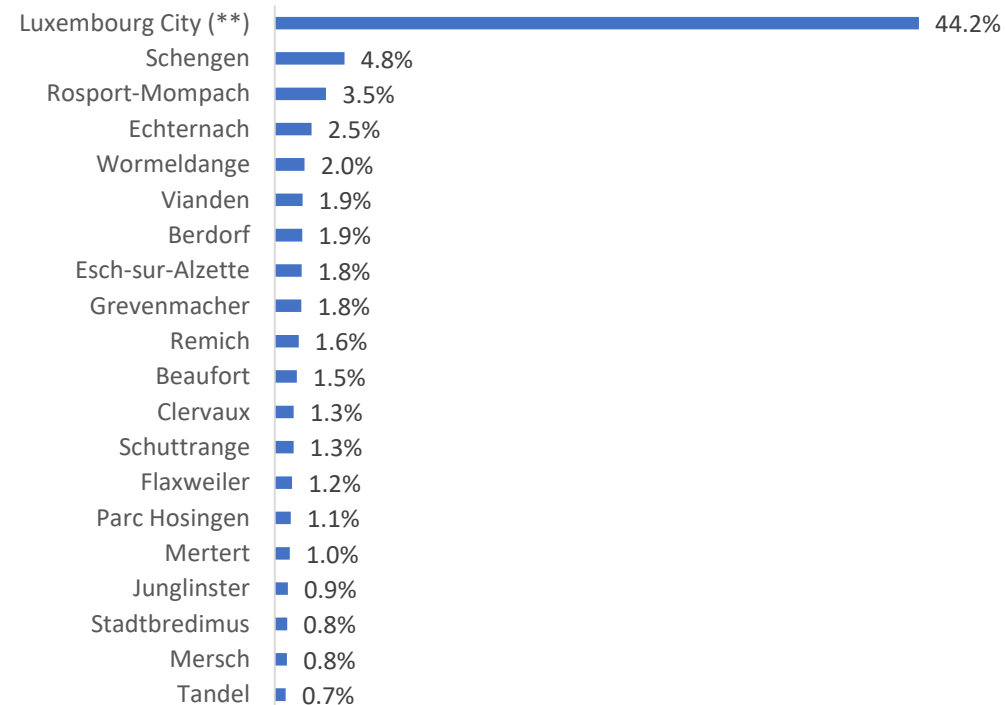
Type of places and cities visited in Luxembourg



Places visited during leisure overnight stays¹



Top cities visited during German overnight and same-day trips² (*), 2022



Sources: ¹LFT/Ilres Visitor Survey, 2020-2022, ²Mobile 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.

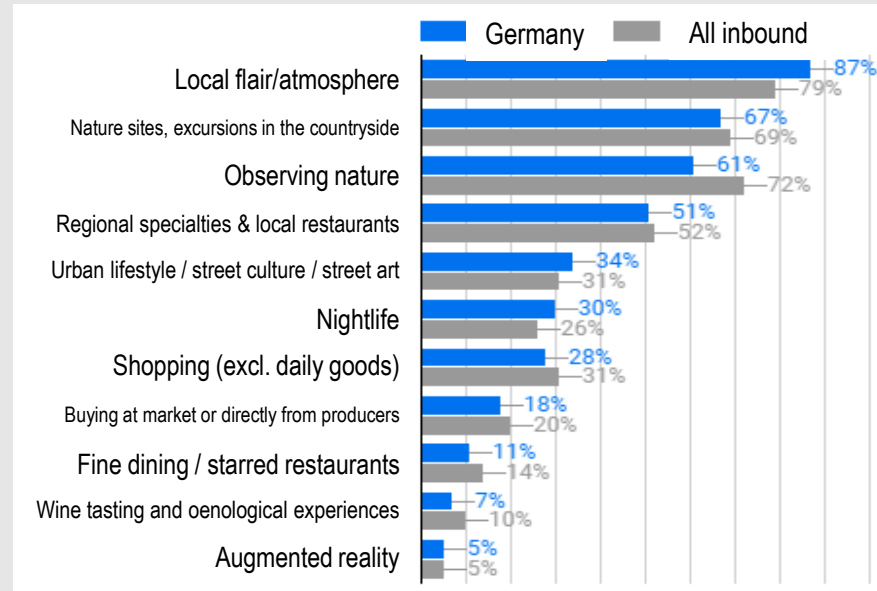
(**) Urban area, incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange).

Activities undertaken in Luxembourg

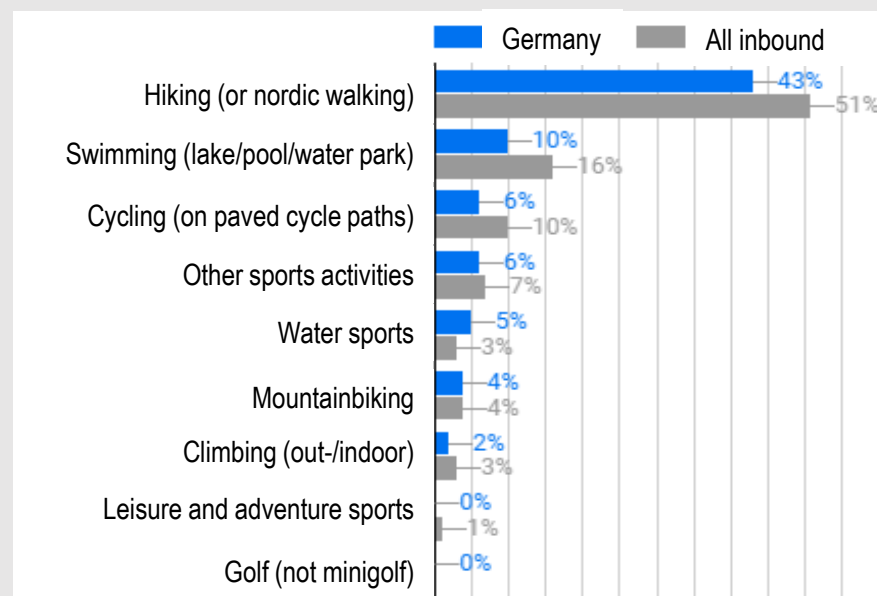
Inbound leisure visitors with overnight, 2020-2022



Non-sporting activities



Sporting activities

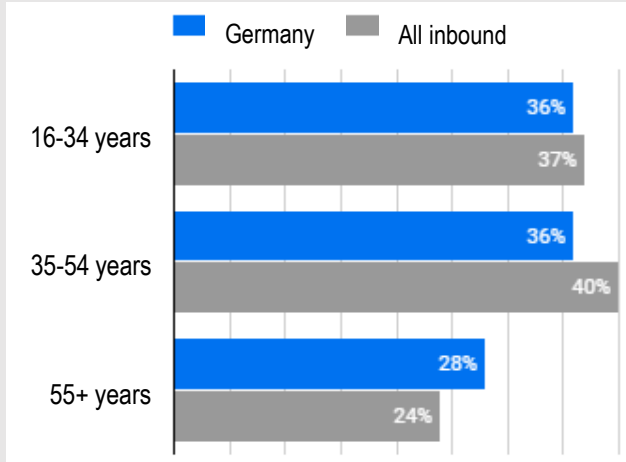


Transport, travel party, age, repeat visits and cross-border trips

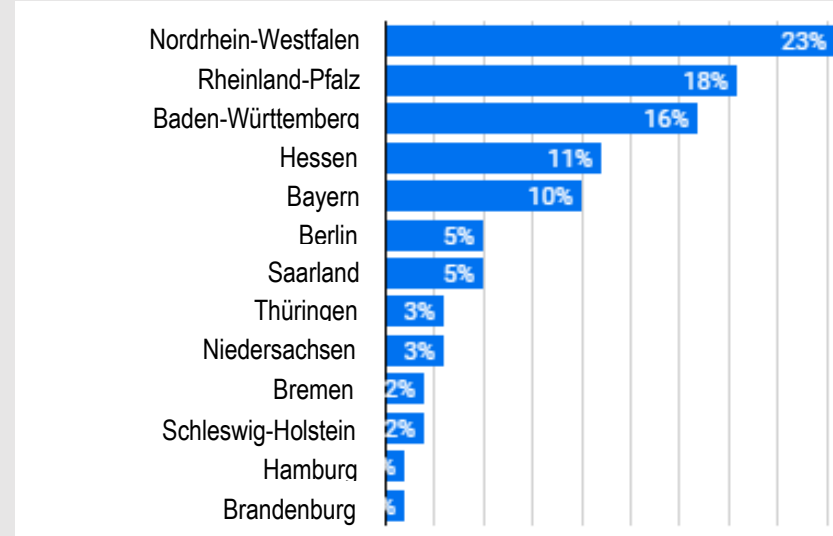
Inbound leisure visitors with overnight, 2020-2022



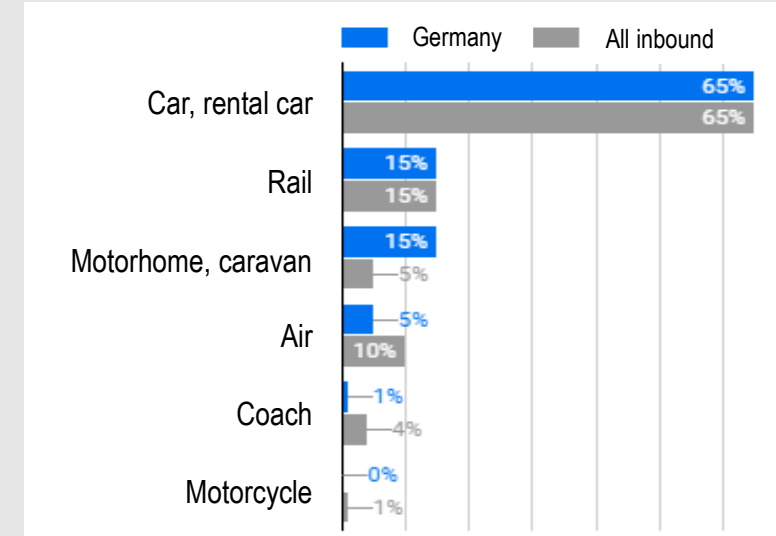
Age groups



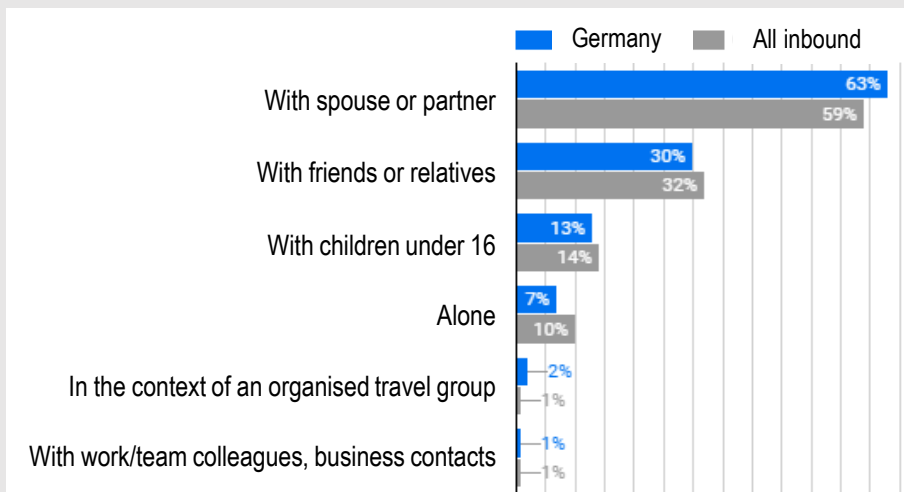
Region of origin



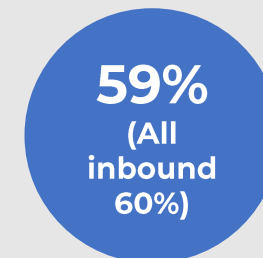
Mode of transport to access Luxembourg



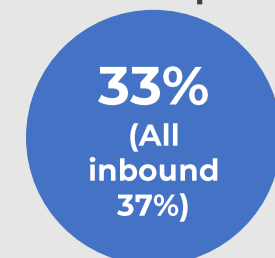
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

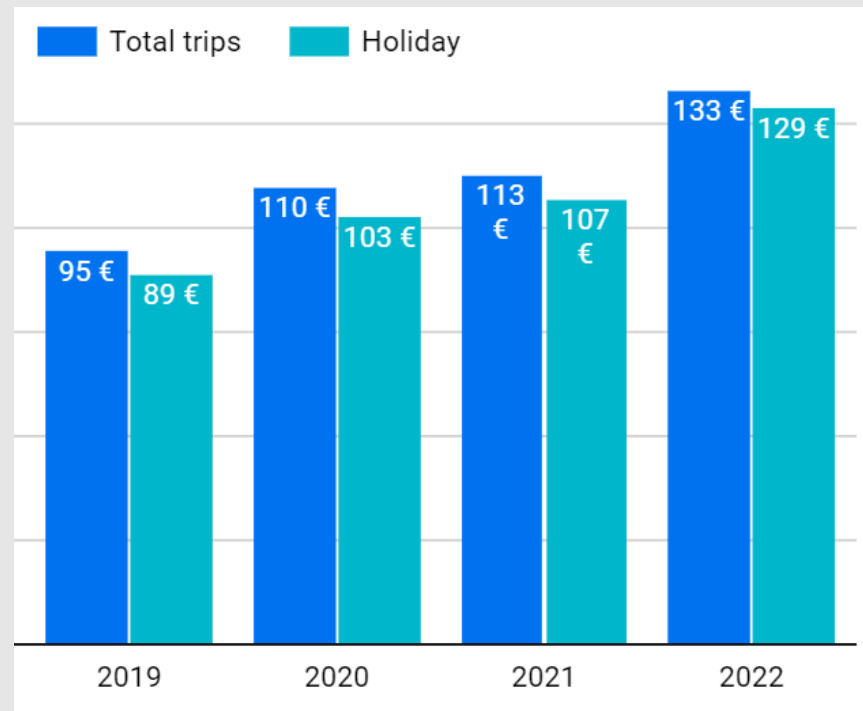


Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

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



2022

Germany to Luxembourg Europe to Luxembourg

Spend/day/pers. on **all** trips

133 €

124 €

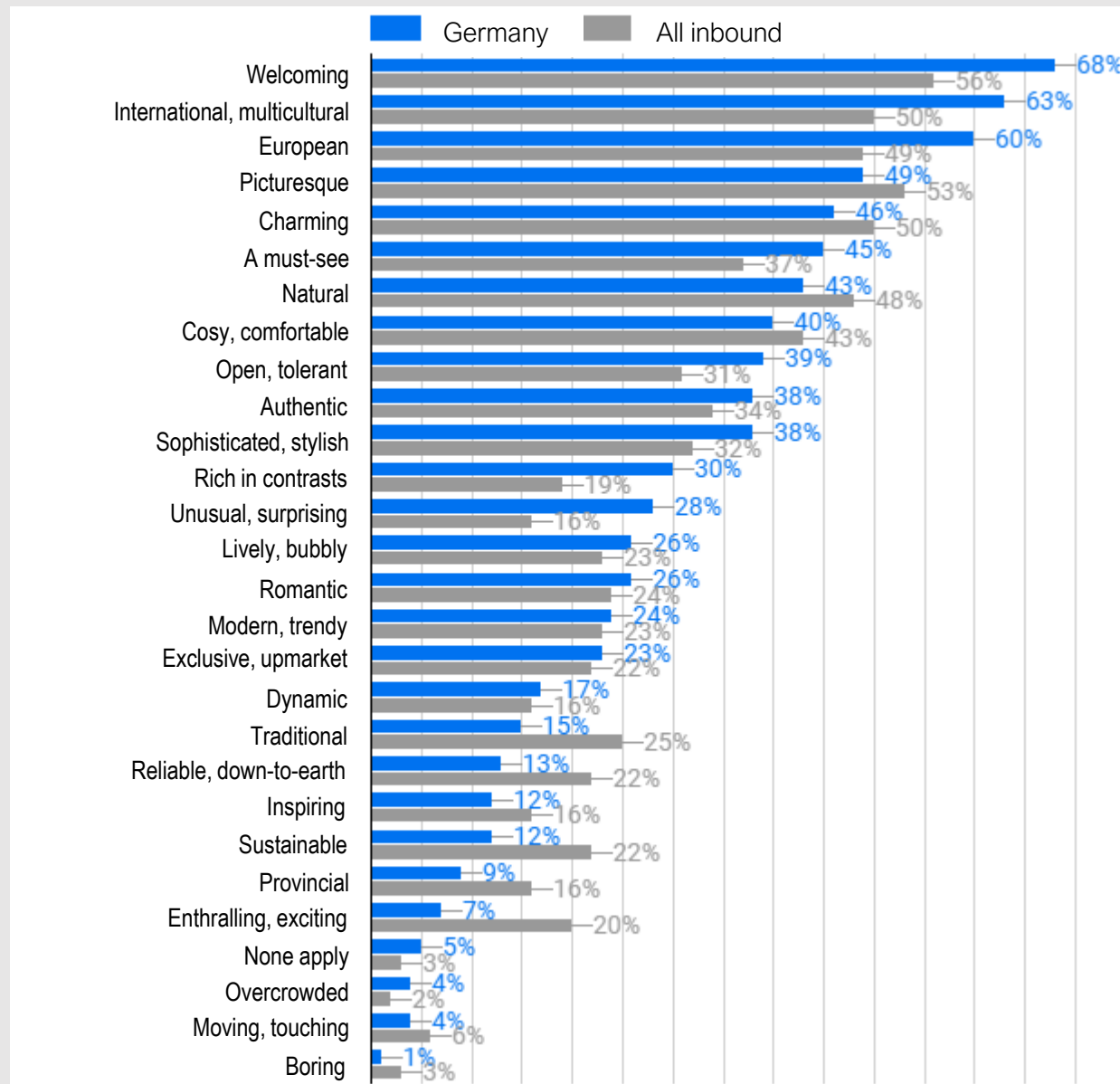
Spend/day/pers. on **holiday** trips

129 €

118 €

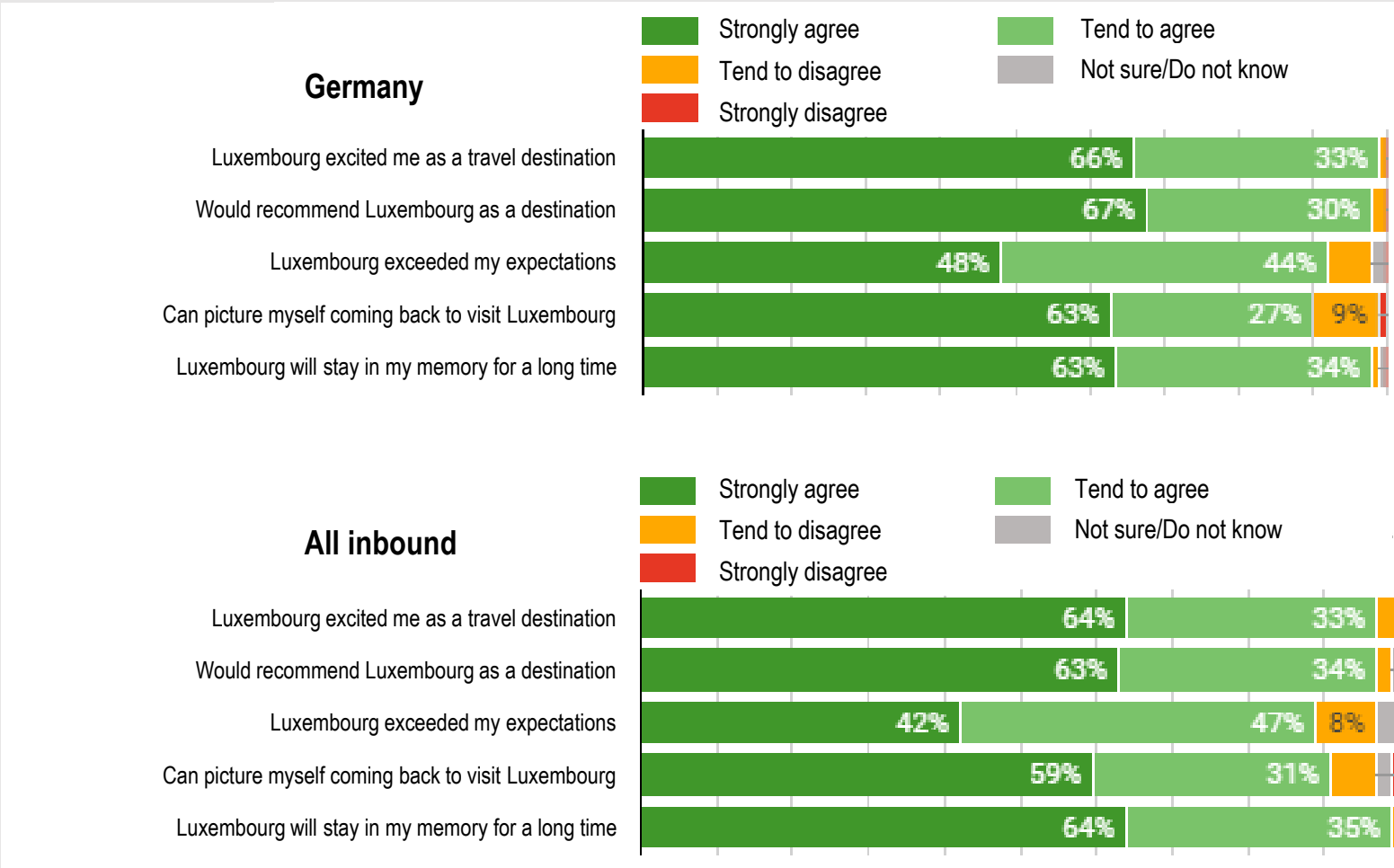
Image perception of Luxembourg

Leisure overnight visitors



Visitor satisfaction and recommendation

Inbound leisure visitors, 2020-2022

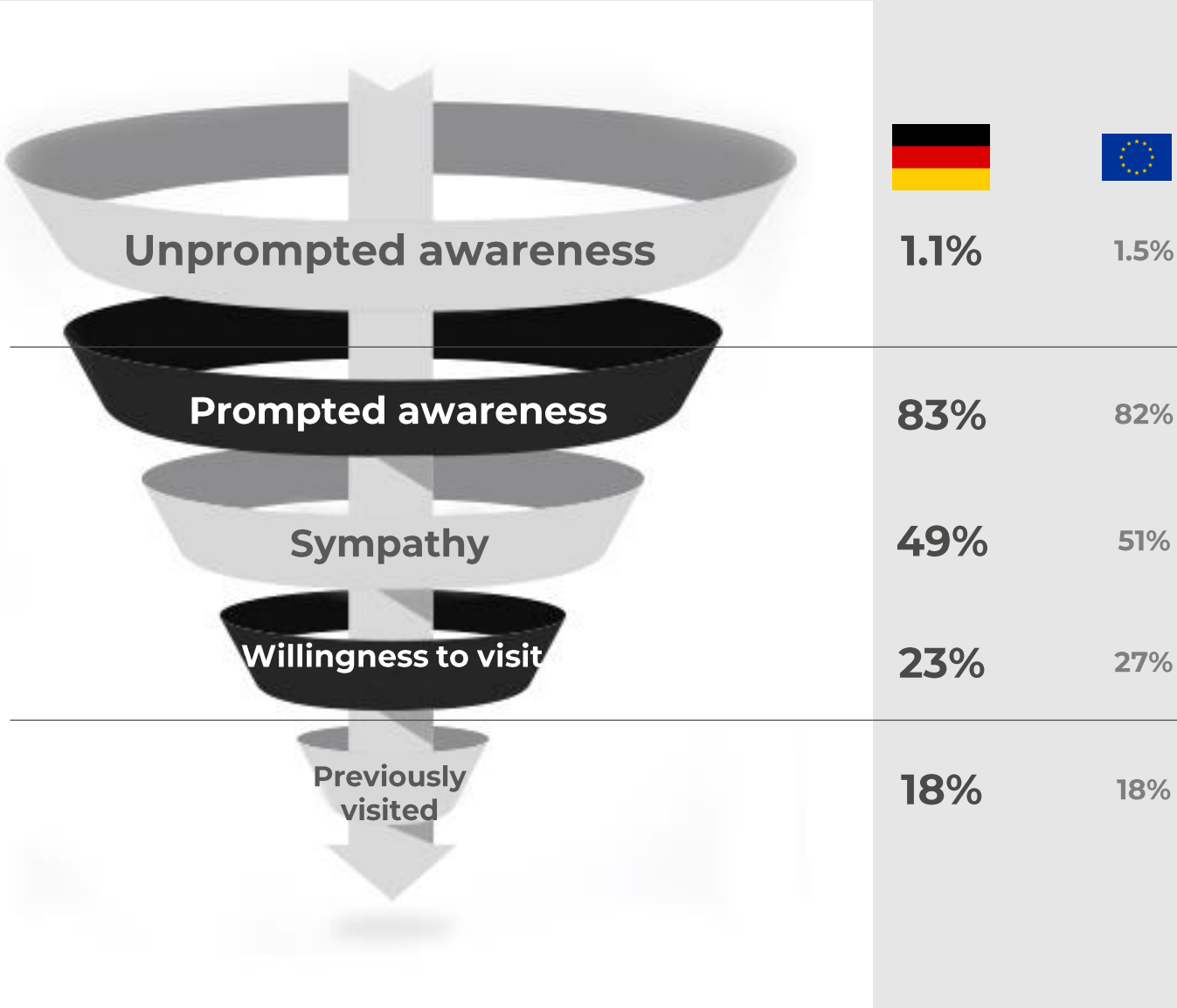




Target segments, Brand & Growth Potential

Brand Funnel 2021-2023

Assessing Luxembourg's brand strength as a destination



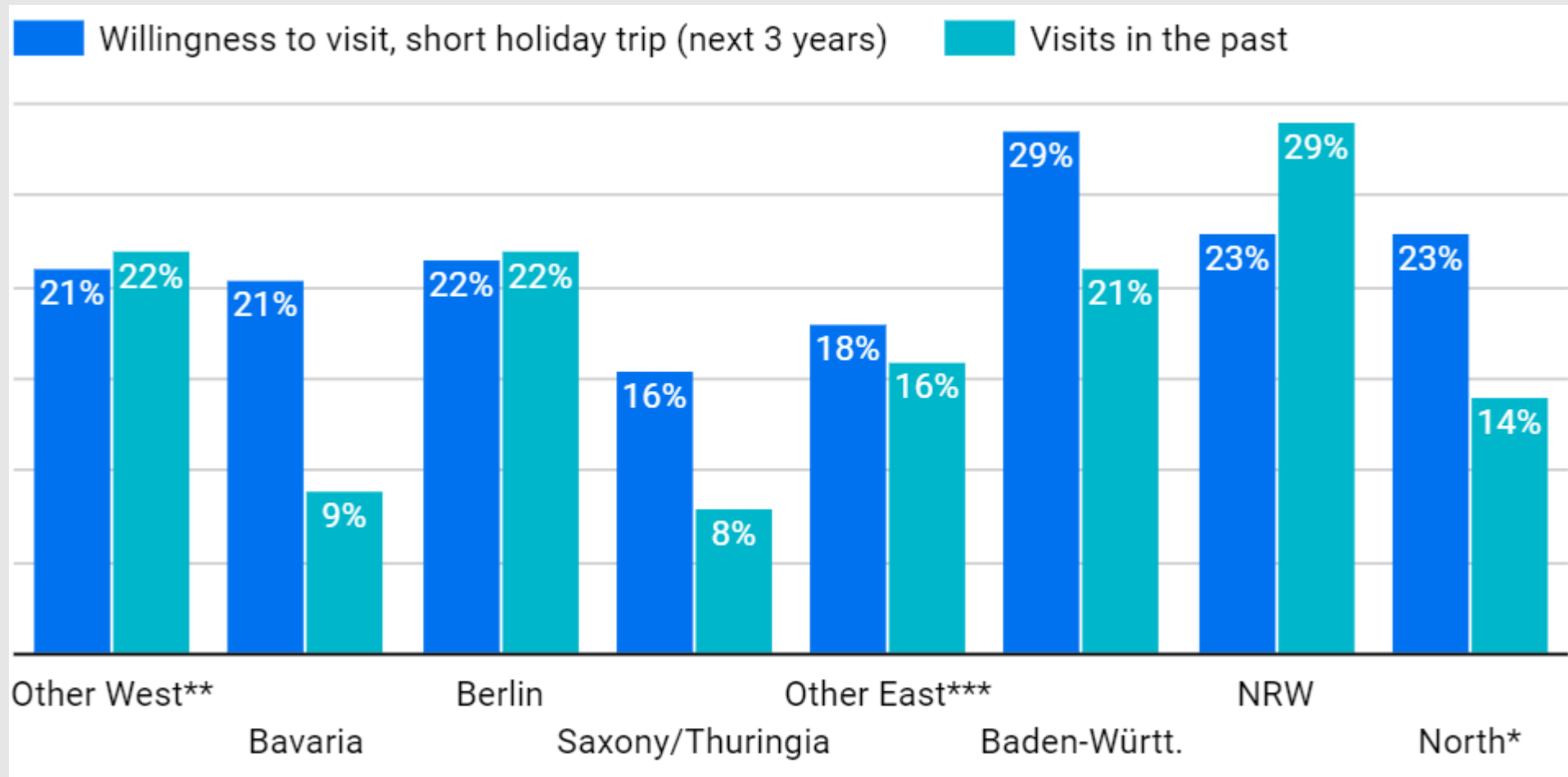
Total future visitor potential from Germany (*)
13.8 million

- Highest future travel intent from Germany (**)**
1. Explorers
 2. Perfection Seekers
 3. Nature-Loving Actives

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






(*) Hamburg, Bremen, Schleswig-H., Lower Saxony

(**) Rhineland-Pal., Saarland, Hesse

(***) Mecklenburg-V., Brandenb., S.-Anhalt

General theme interest (*)






Theme			
	Rank	Rank	% interested
Resting/Relaxation	1	1	78%
Nature	3	2	72%
Culinary	2	3	67%
City	4	4	60%
Castles	5	5	55%
Wellness	13	6	47%
Hiking	8	7	47%
Culture	6	8	42%
History/Unesco	7	9	41%
Shopping	10	10	41%
Sustainability	9	11	40%
Countryside	15	12	39%
Nightlife (**)	12	13	38%
Events	14	14	36%
Cycling	21	15	35%
Active-sports	18	16	34%
Family	11	17	33%
Wine	16	18	31%
Luxury	17	19	28%
Camping	20	20	28%
Industrial heritage	19	21	27%
MTB	22	22	20%
Voluntary work	24	23	17%
Motorcycling	23	24	11%

(*) 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).

Luxembourg's Theme Competence (*)



Theme			
	Rank	Rank	% agreeing
City	1	1	46%
Shopping	5	2	42%
Castles	3	3	39%
Resting/Relaxation	2	4	38%
Culture	4	5	35%
Nature	7	6	34%
Culinary	6	7	32%
Wellness	9	8	29%
Cycling	13	9	27%
Hiking	10	10	27%
Sustainability	12	11	25%
Family	14	12	24%
Nightlife (***)	11	13	24%
Active-sports	18	14	22%
Countryside	17	15	22%
Camping	15	16	21%
History/Unesco	8	17	20%
Wine	16	18	20%
MTB	20	19	17%
Industrial Heritage	19	20	16%

Growth potential for themes (**)

- Culinary & Wine
- Nature
- Hiking
- Countryside
- History/Unesco
- 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).

Luxembourg's Brand Value Ratings (*)



Feature			
	Rank	Rank	% agreeing
Open-minded, tolerant	3	1	42%
Welcoming, hospitable	2	2	36%
Authentic	1	3	34%
Attractive, appealing	4	4	33%
Lively, hip	9	5	31%
Service-oriented	7	6	31%
Lot of variety, diversified	6	7	30%
Surprising	5	8	27%
Not crowded, insider tip	8	9	25%
Sustainable	10	10	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.

Spontaneous associations with Luxembourg



LFT strategic market focus

Market prioritisation



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

Theme & segment focus

Theme	Priority	Marketing	Segments
Nature	1	Image	EXP, (NLA)
Hiking	1	Image	EXP, NLA, (PS)
Culinary	2	Image	PS, NLA
City	2	Activating	EXP, SB
Wine	3	Image	PS, NLA, SB
Industrial Heritage	3	Image	EXP, SB
Castles	3	Activating	EXP, PS, SB
Cycling	3	Image	PS, NLA

Brand Value focus

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



Your contact



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