



Luxembourg for Tourism

Market profile

ITALY

2022



Economic indicators & General Travel Demand

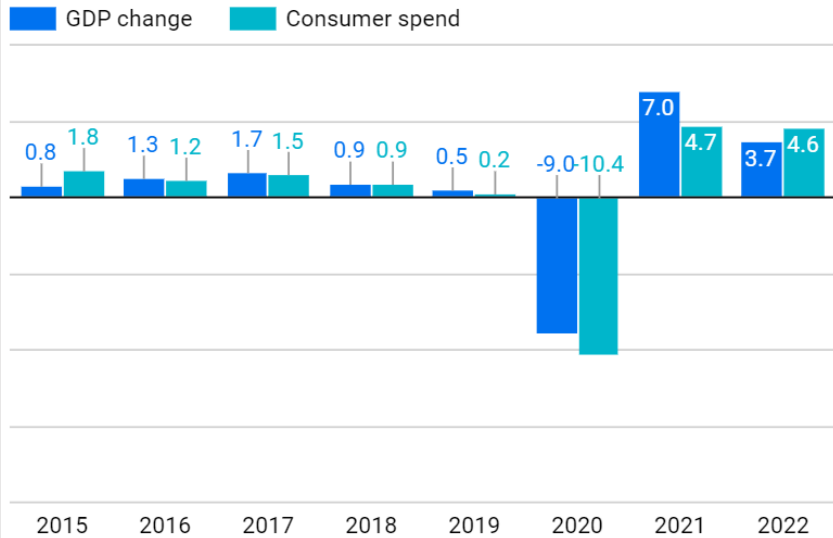
Economic indicators – General travel demand



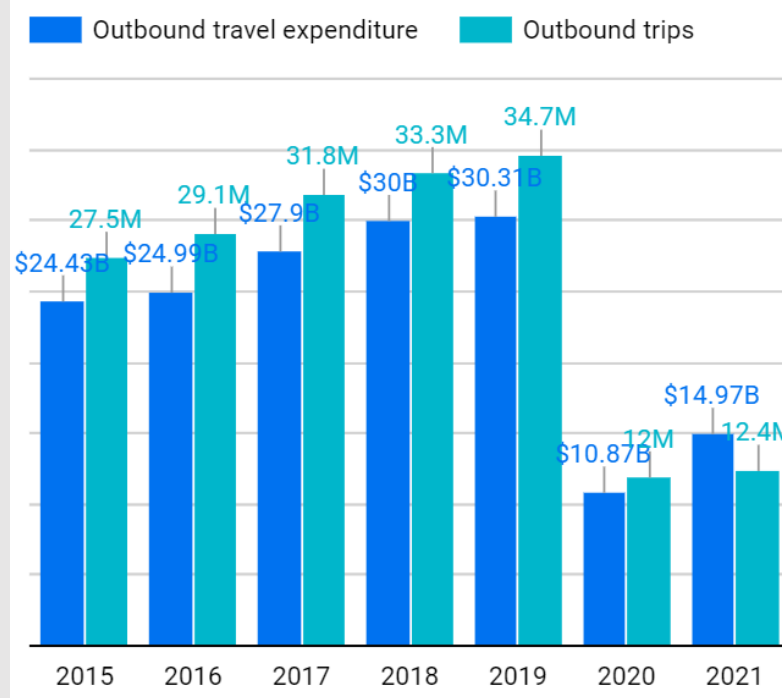
Economy & population

GDP (PPP) per capita **\$43,114** Unemployment (%) **8.8** Population (mn) **59.0** Inflation (%) **8.2**

GDP and Consumer spending, % annual change



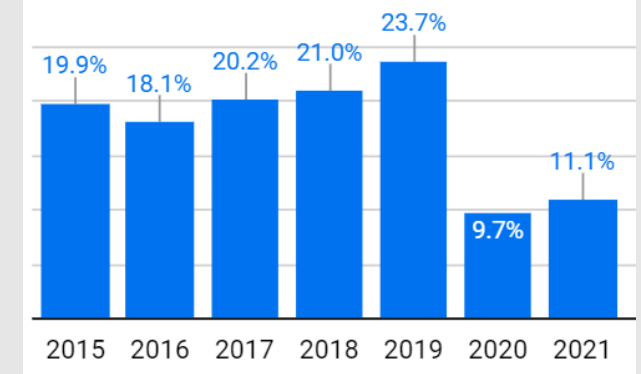
Outbound trips and travel expenditure



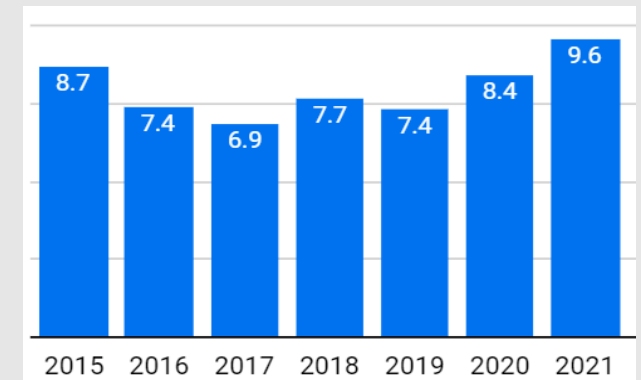
Average spend per outbound trip (2019)
873 \$

Outbound travel intensity
0.58 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)
86.8%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2022



**Nights,
paid accommodation, 2022**



+62% (vs. 2021)
-16% (vs. 2019)

**Arrivals,
paid accommodation, 2022**



+96% (vs. 2021)
-19% (vs. 2019)

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



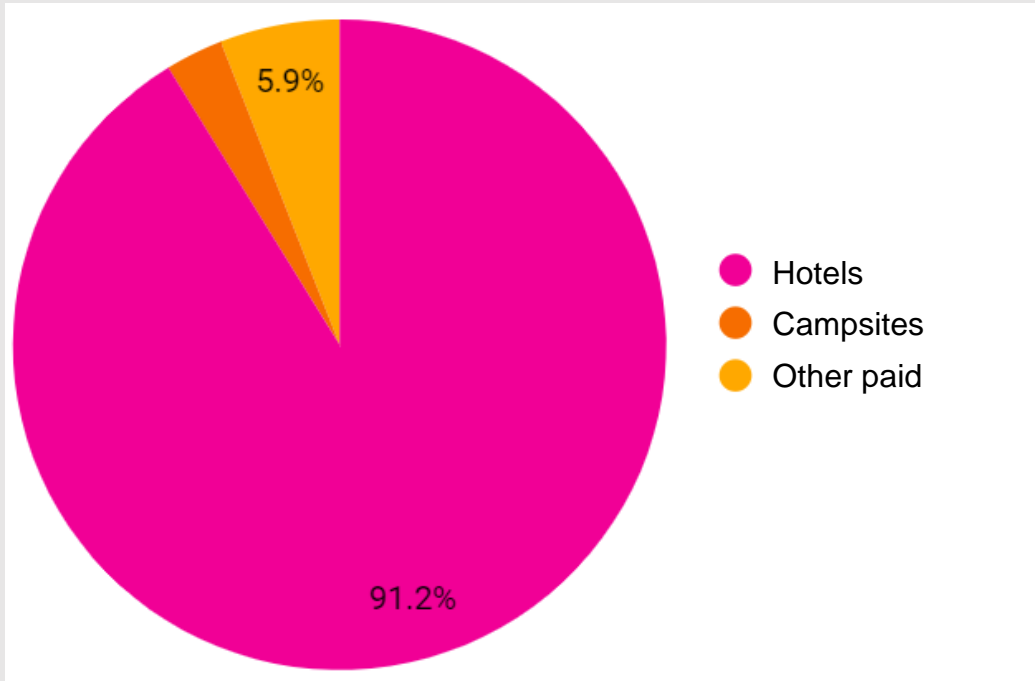
-0.48 days (vs. 2021)
+0.07 days (vs. 2019)

Nights & arrivals in paid accommodation

Type of accommodation, 2022

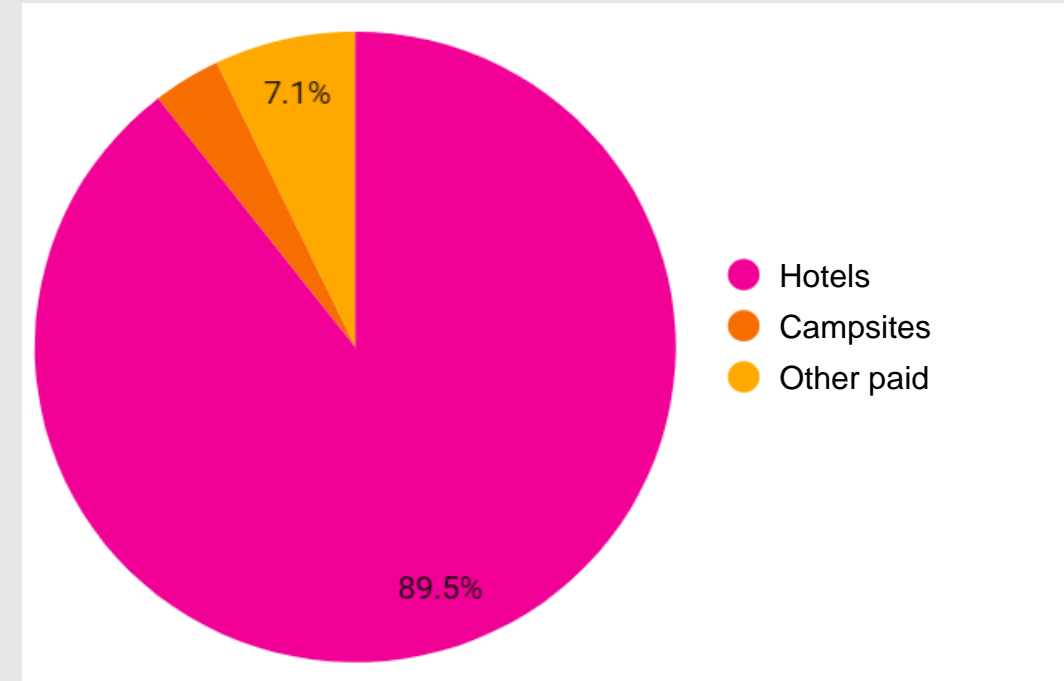


Nights, paid accommodation



Hotels	50.088	-16% (vs. 2019)
Campsites	1.569	+70% (vs. 2019)
Other paid	3.256	-28% (vs. 2019)

Arrivals, paid accommodation



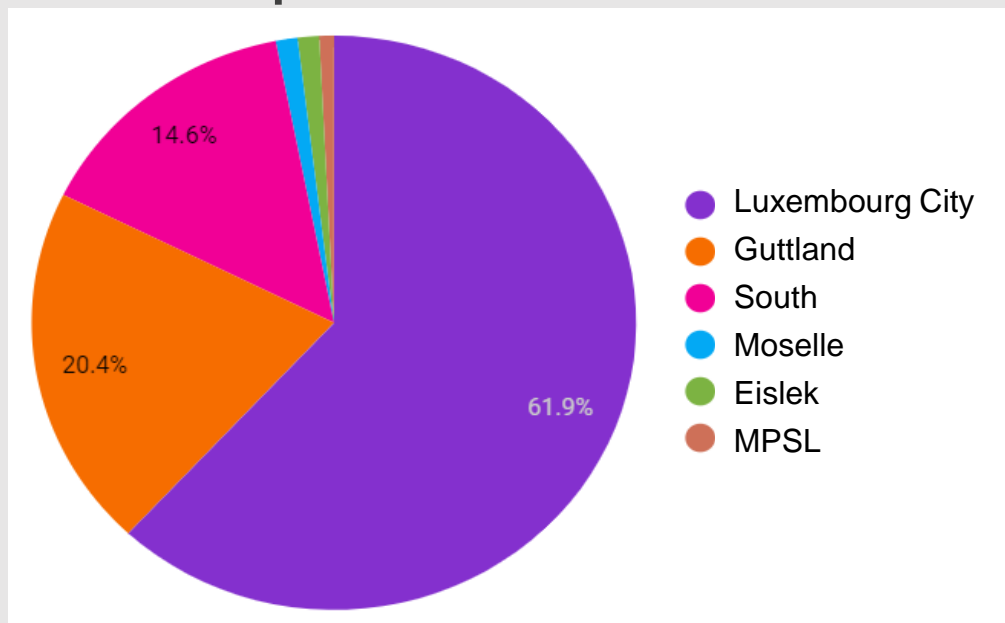
Hotels	21.181	-21% (vs. 2019)
Campsites	812	+75% (vs. 2019)
Other paid	1.686	-4% (vs. 2019)

Nights & arrivals in paid accommodation

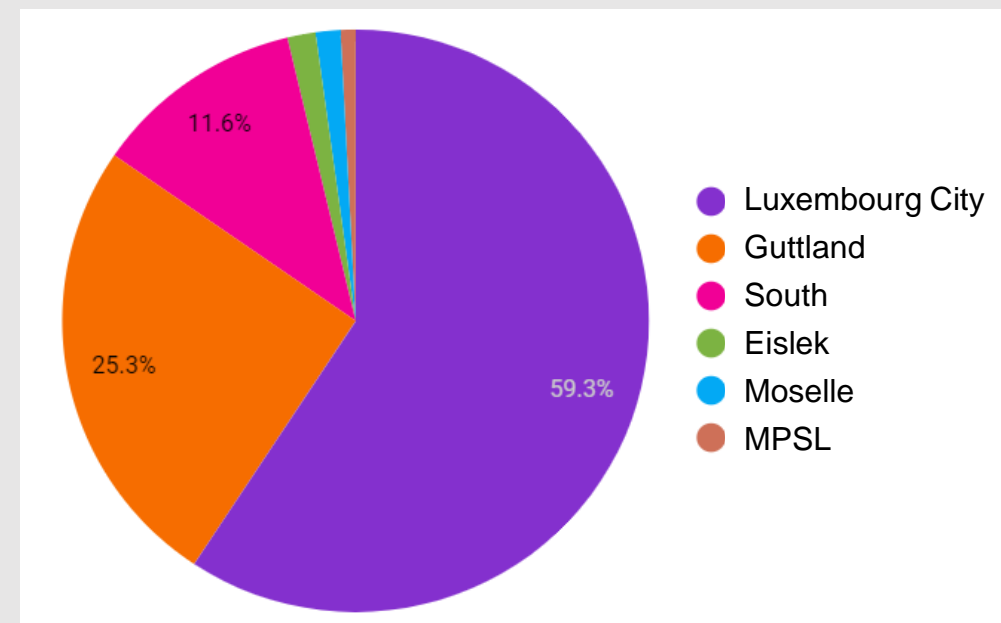
Regions, 2022



**Nights,
paid accommodation**



**Arrivals,
paid accommodation**



Luxembourg City	33.996	-13% (vs. 2019)
Guttland	11.225	-19% (vs. 2019)
South	7.994	-18% (vs. 2019)
Moselle	639	-56% (vs. 2019)
Eislek	631	+27% (vs. 2019)
MPSL	428	-53% (vs. 2019)

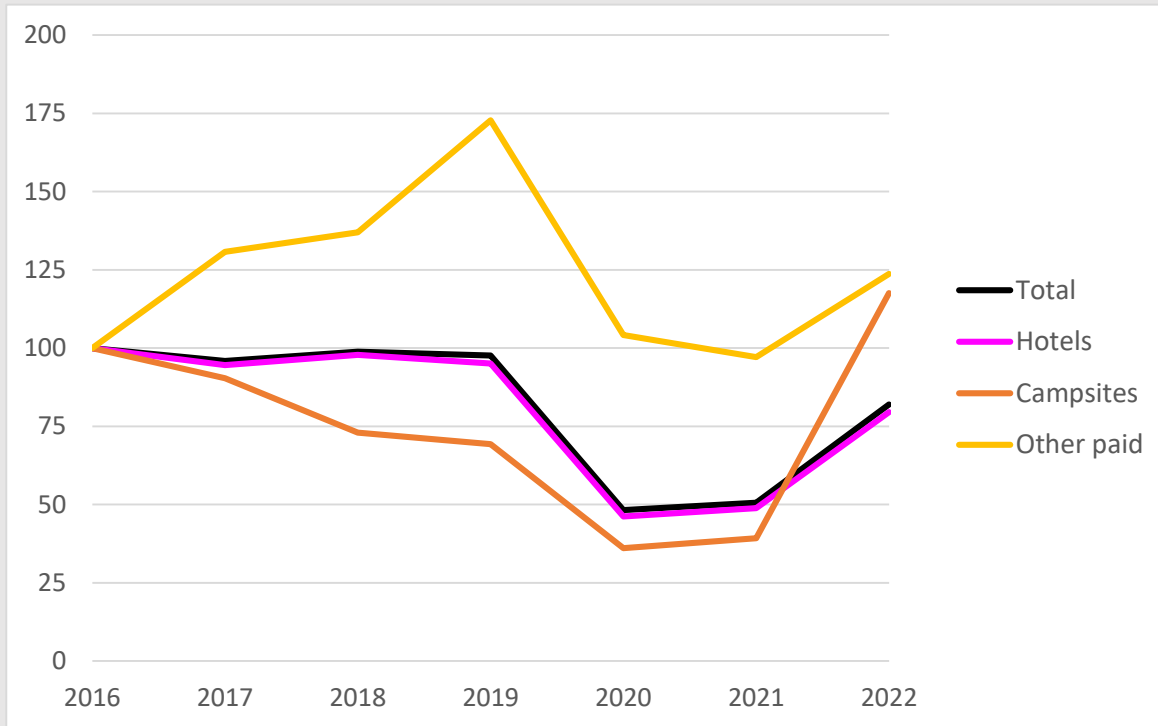
Luxembourg City	14.037	-20% (vs. 2019)
Guttland	6.001	-14% (vs. 2019)
South	2.754	-19% (vs. 2019)
Eislek	368	+85% (vs. 2019)
Moselle	323	-48% (vs. 2019)
MPSL	196	-50% (vs. 2019)

Nights in paid accommodation

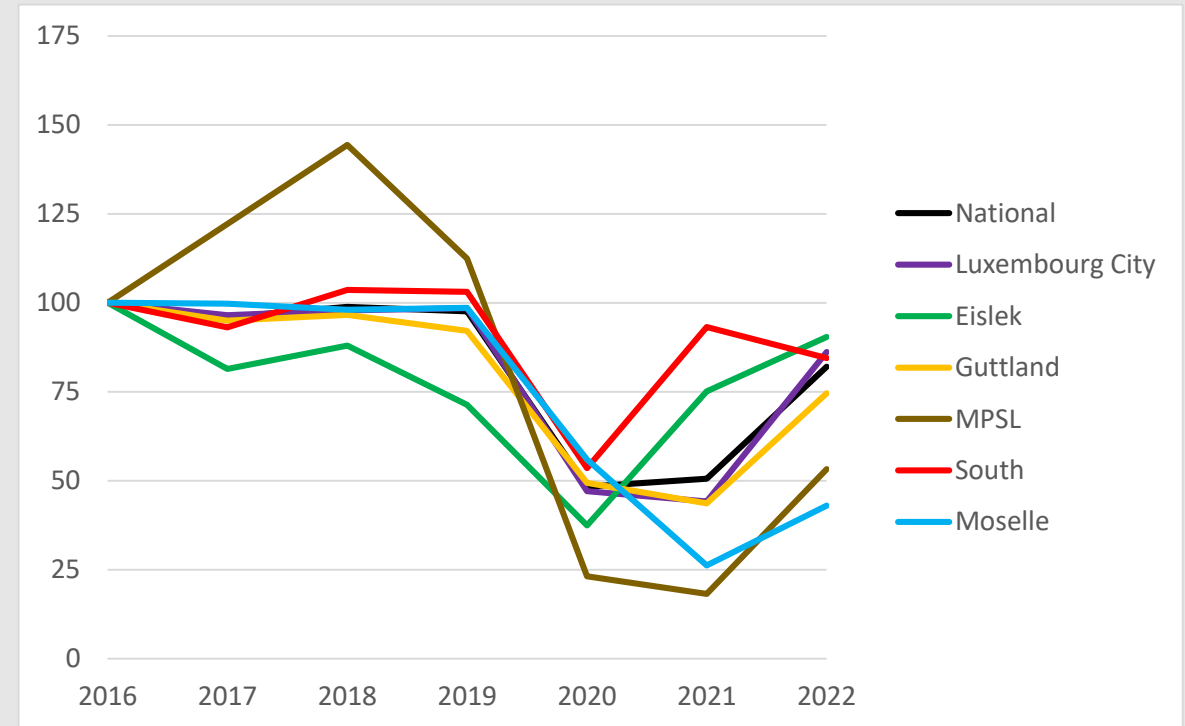
Total, Type of accommodation & Regions : Trends 2016-2022



2016 = Index 100



2016 = Index 100

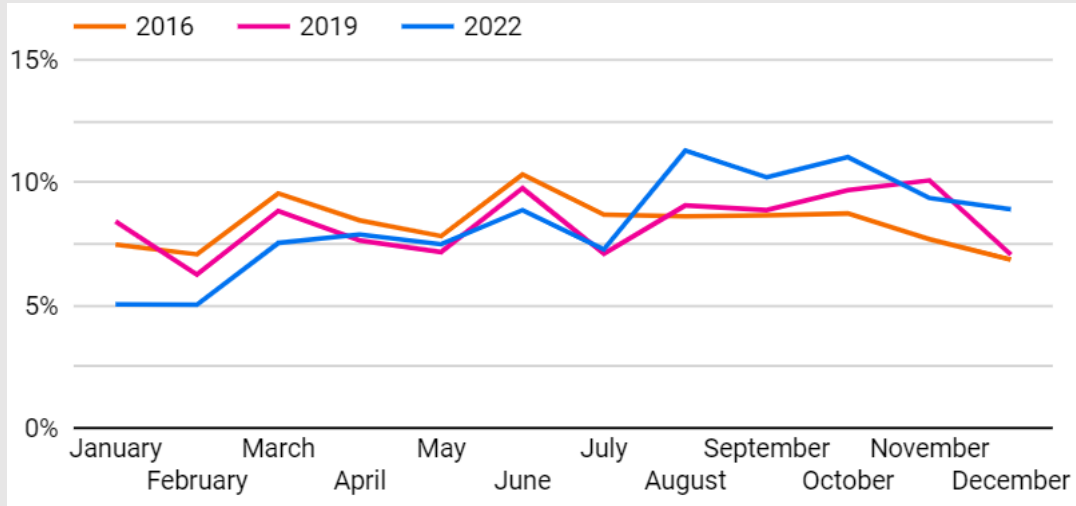


Nights in paid accommodation

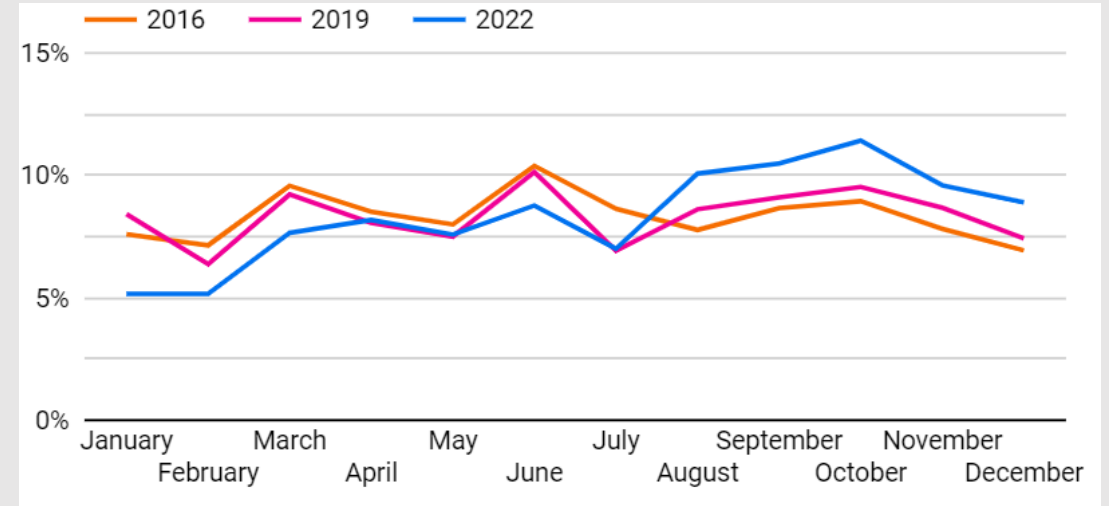
Seasonality



Grand Duchy of Luxembourg, all paid accommodation



Grand Duchy of Luxembourg, hotels



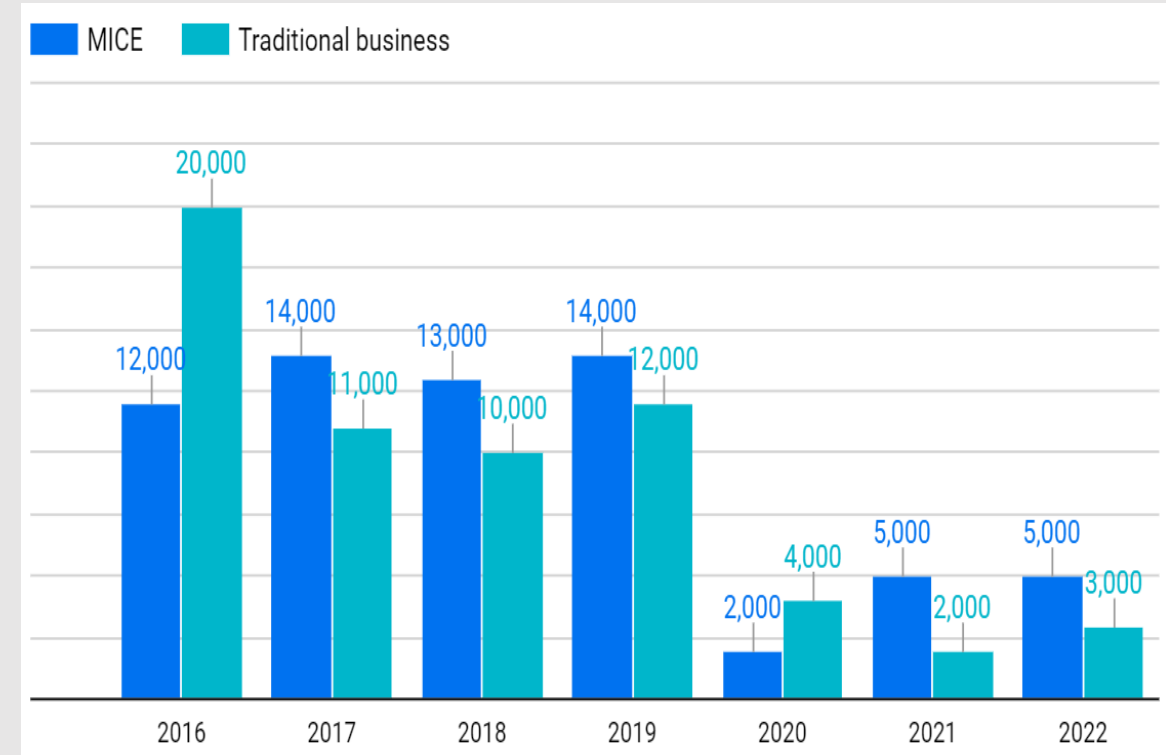
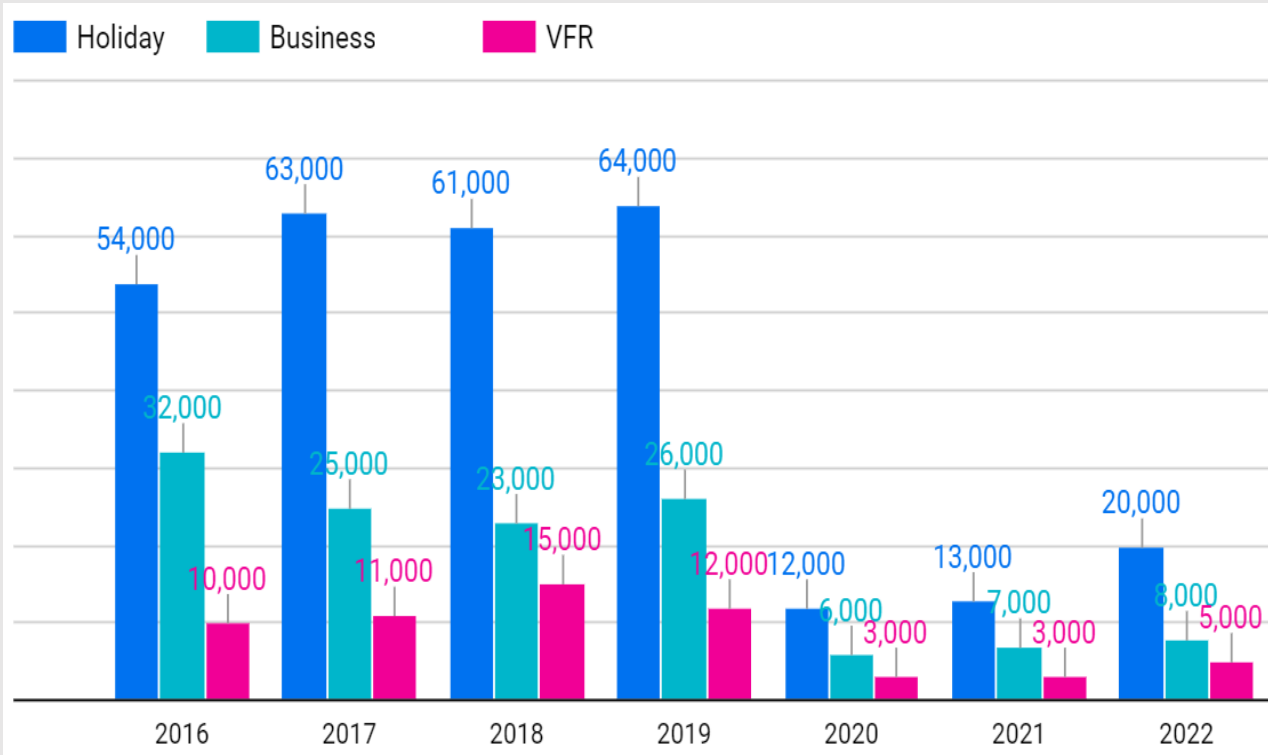


Characteristics of Italian inbound trips to Luxembourg

Italian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

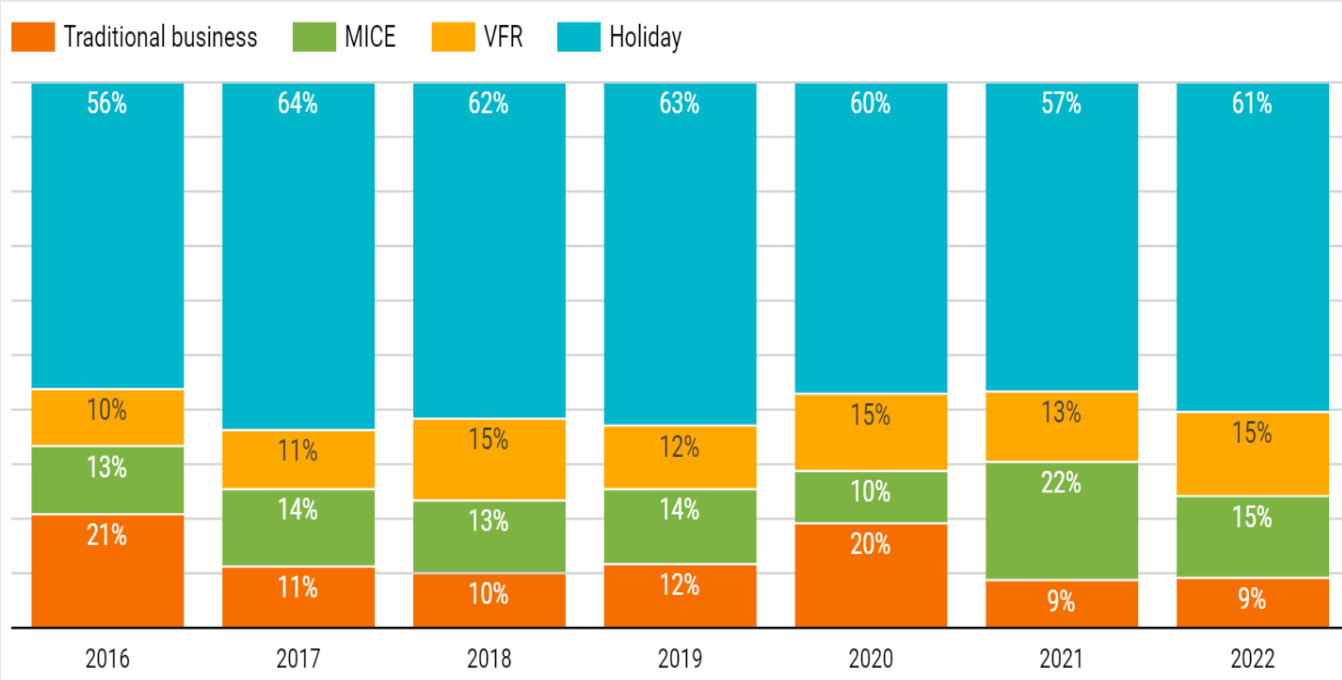


Italian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

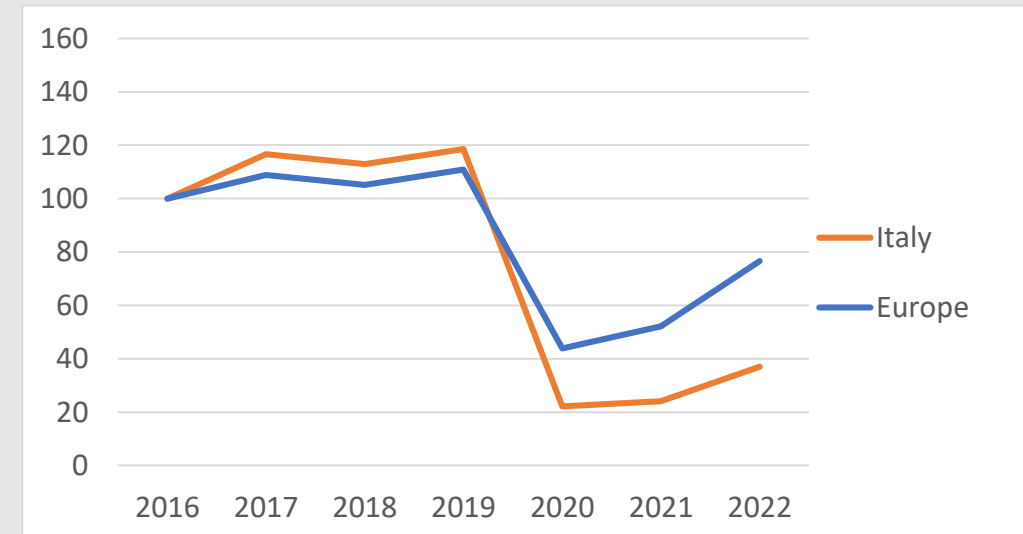
Italian trips to Luxembourg, 2016-2022



2022

	Italy to Luxembourg	Europe to Luxembourg
Holiday	61%	63%
VFR	15%	17%
MICE	15%	12%
Traditional Business	9%	8%

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

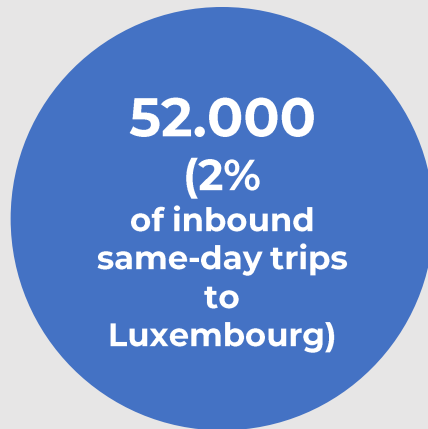


Italian same-day trips to Luxembourg

2022

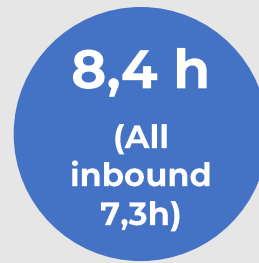


Number of Italian same-day trips to Luxembourg

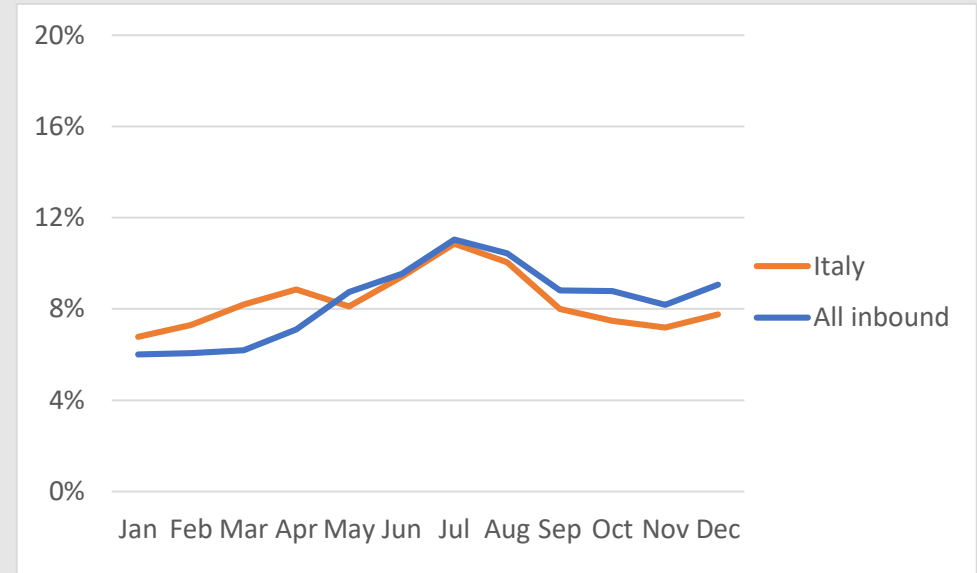


+18% (vs. 2021)

Average length of same-day trips



Seasonality of same-day trips, % monthly share





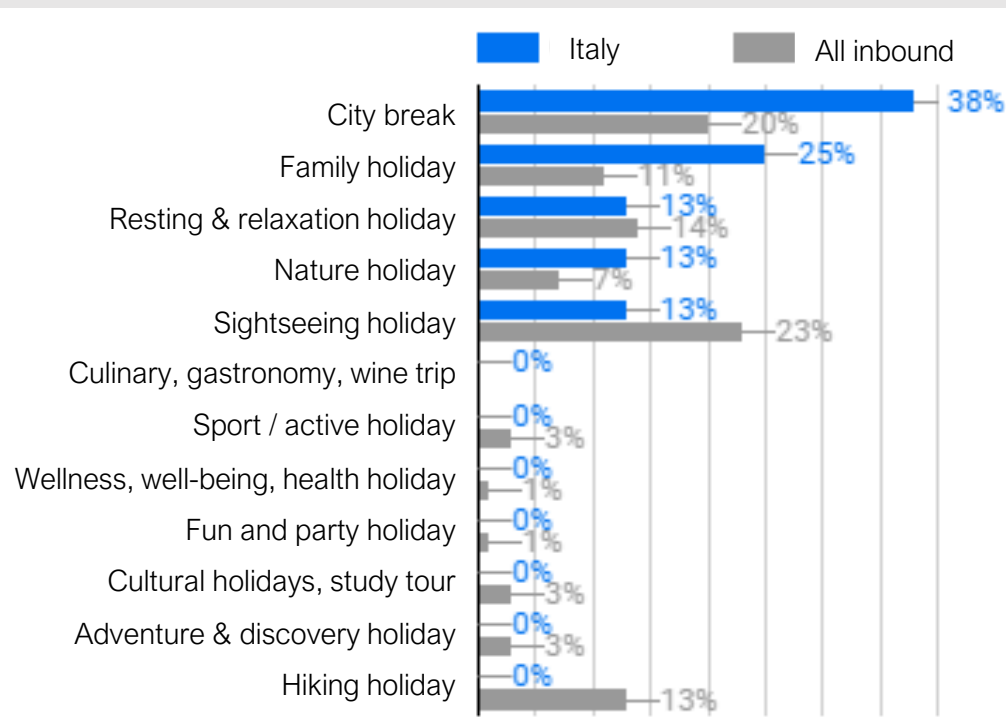
Travel behaviour of Italian leisure visitors in Luxembourg

Holiday types

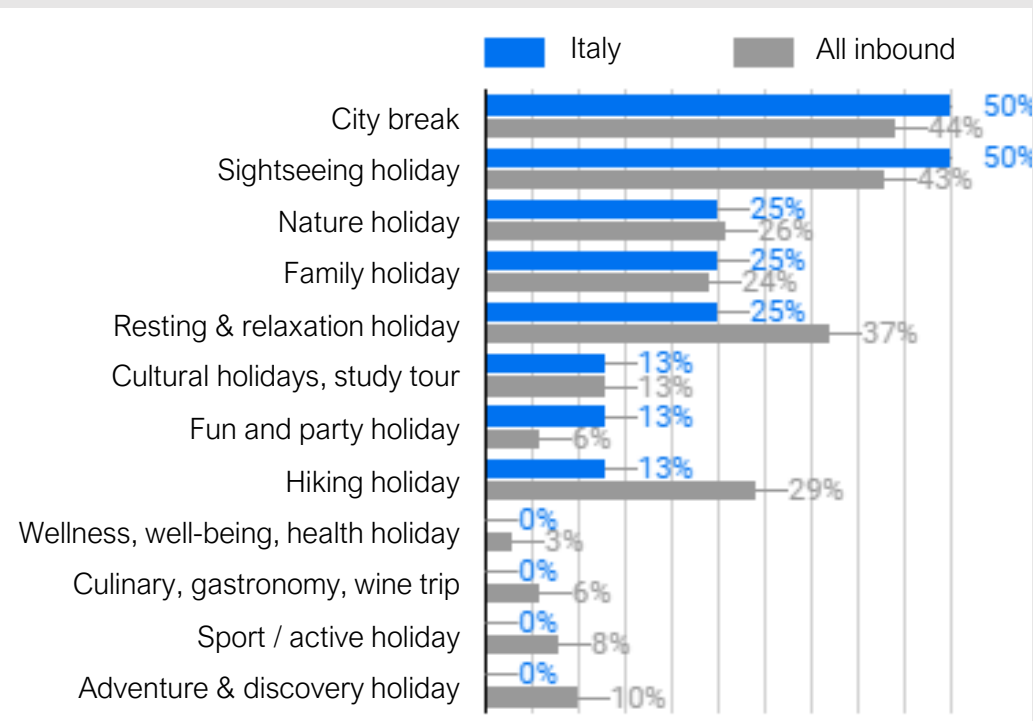
Inbound leisure visitors with overnight, 2020-2022



Main holiday types

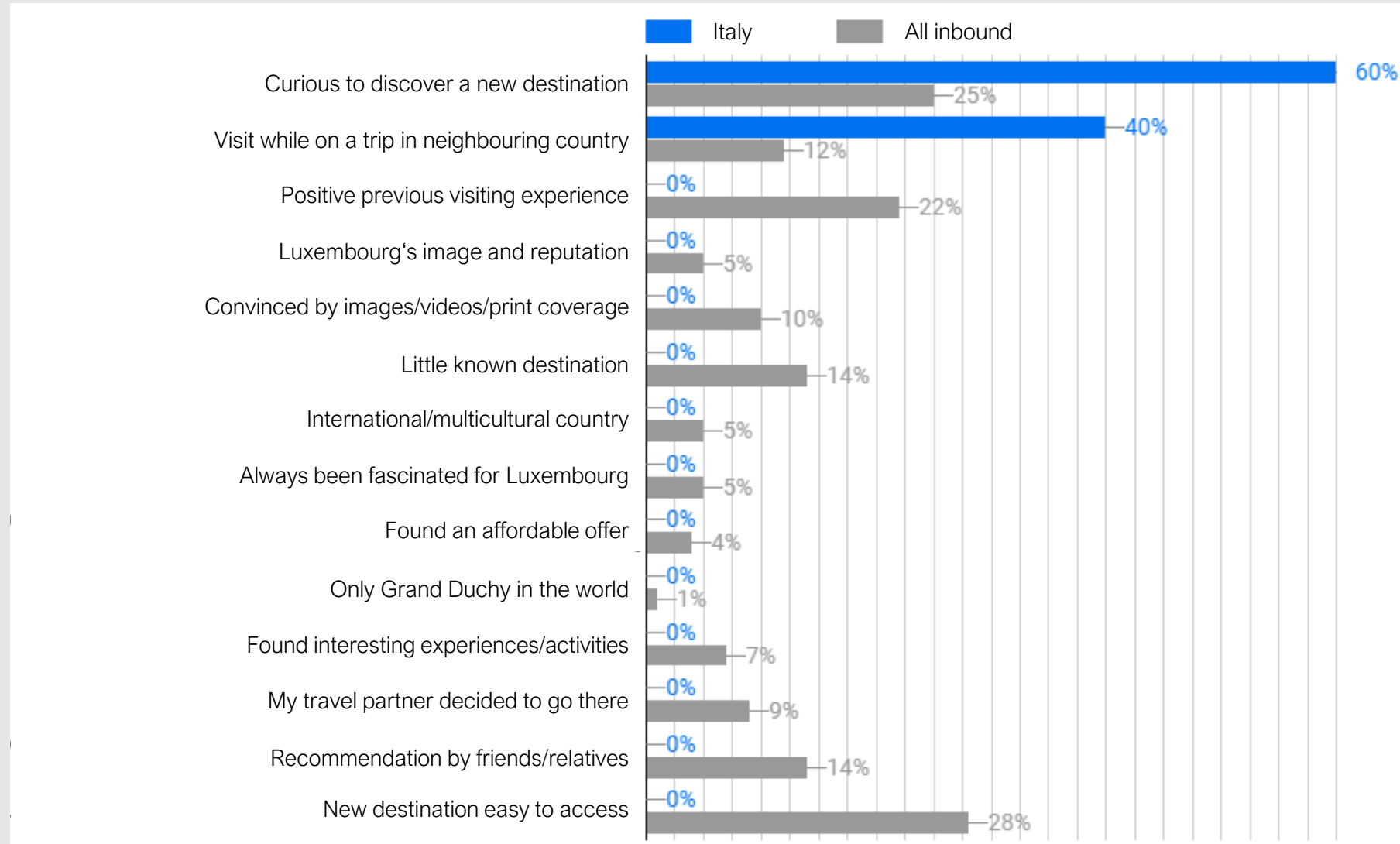


Additional holiday types



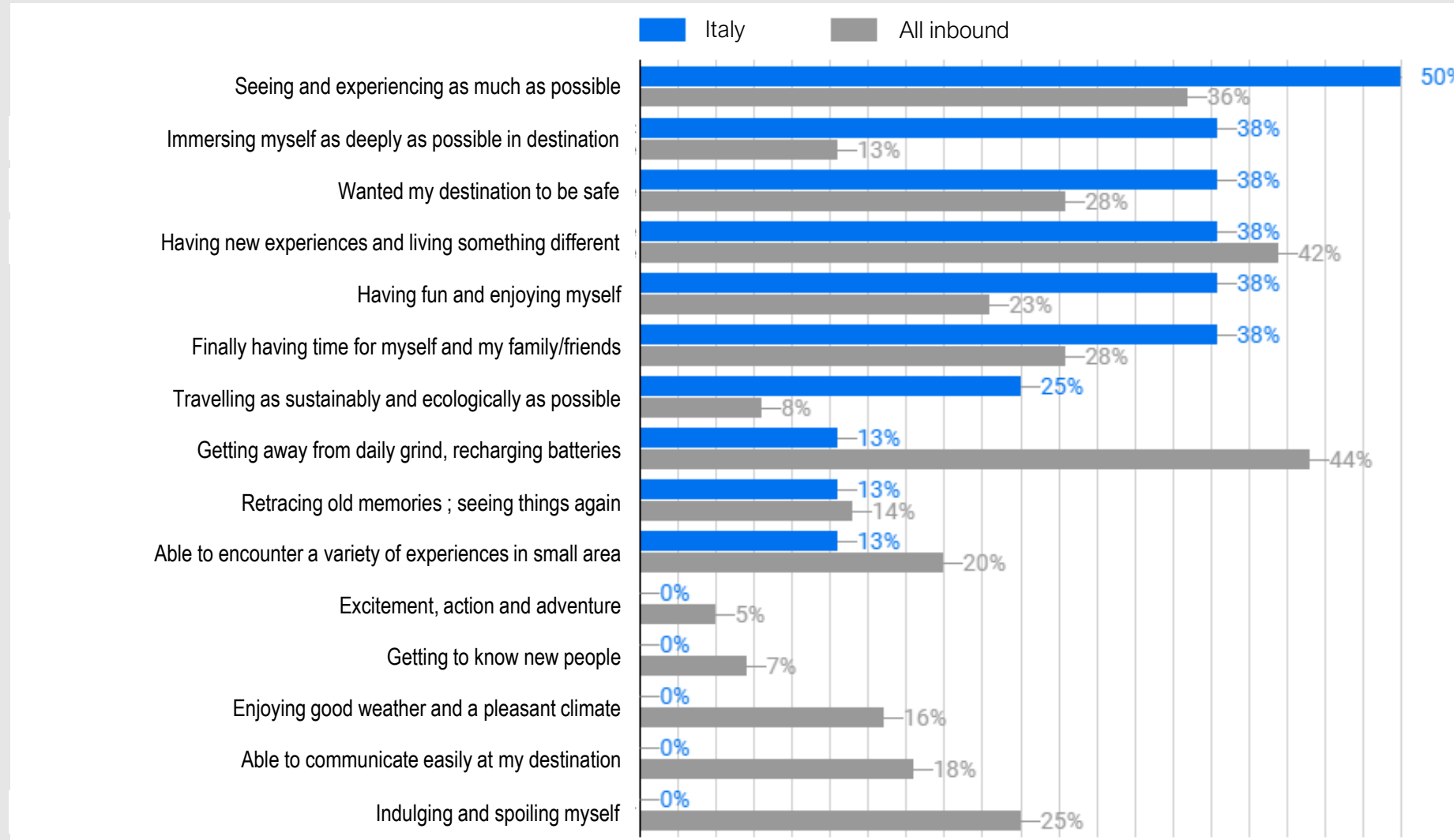
Key decision criteria for choosing Luxembourg

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



Key travel motivations

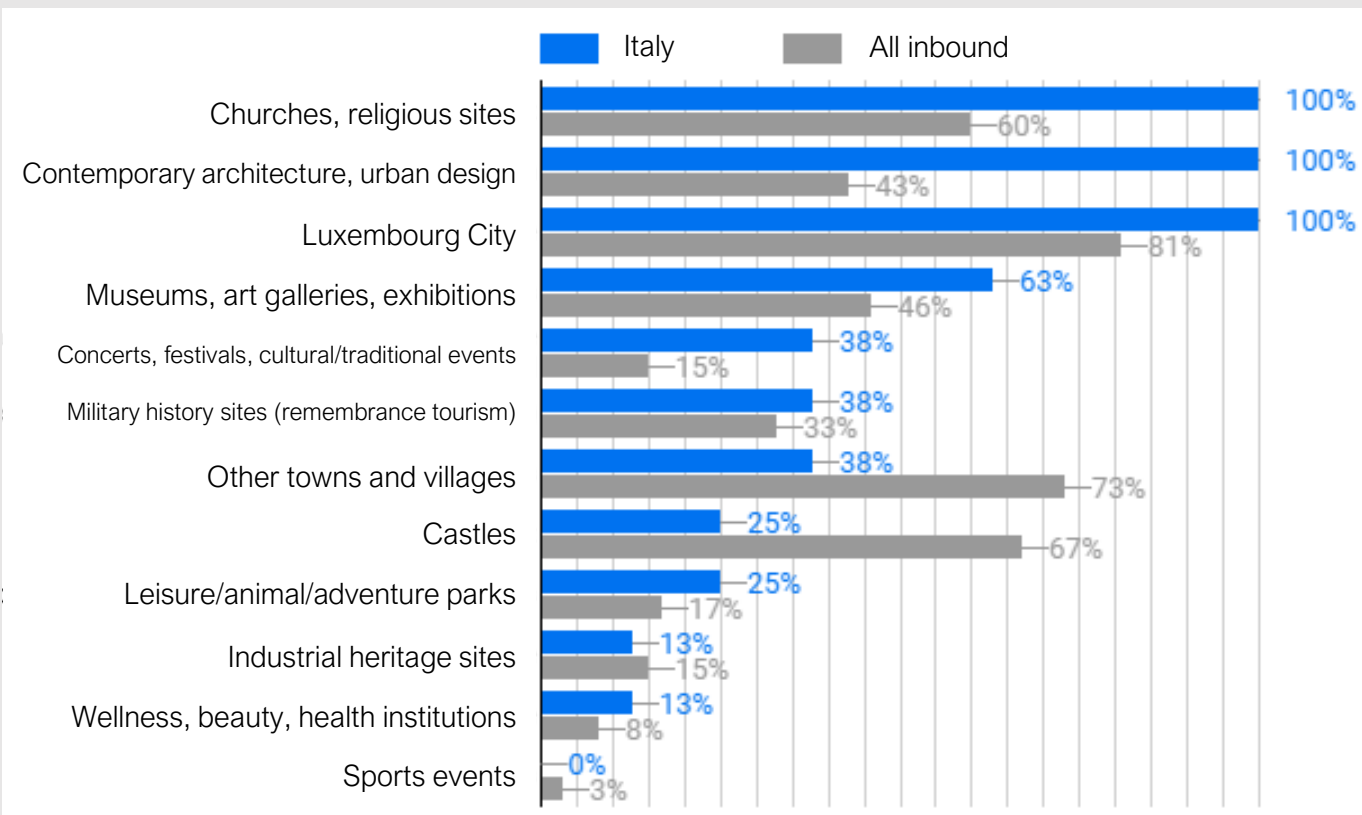
Inbound leisure visitors with overnight, 2020-2022



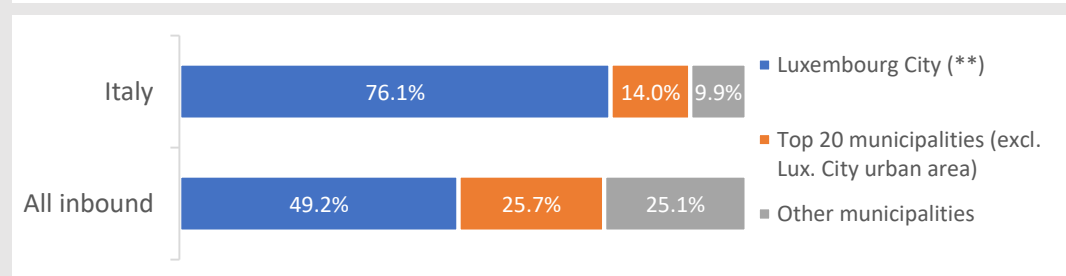
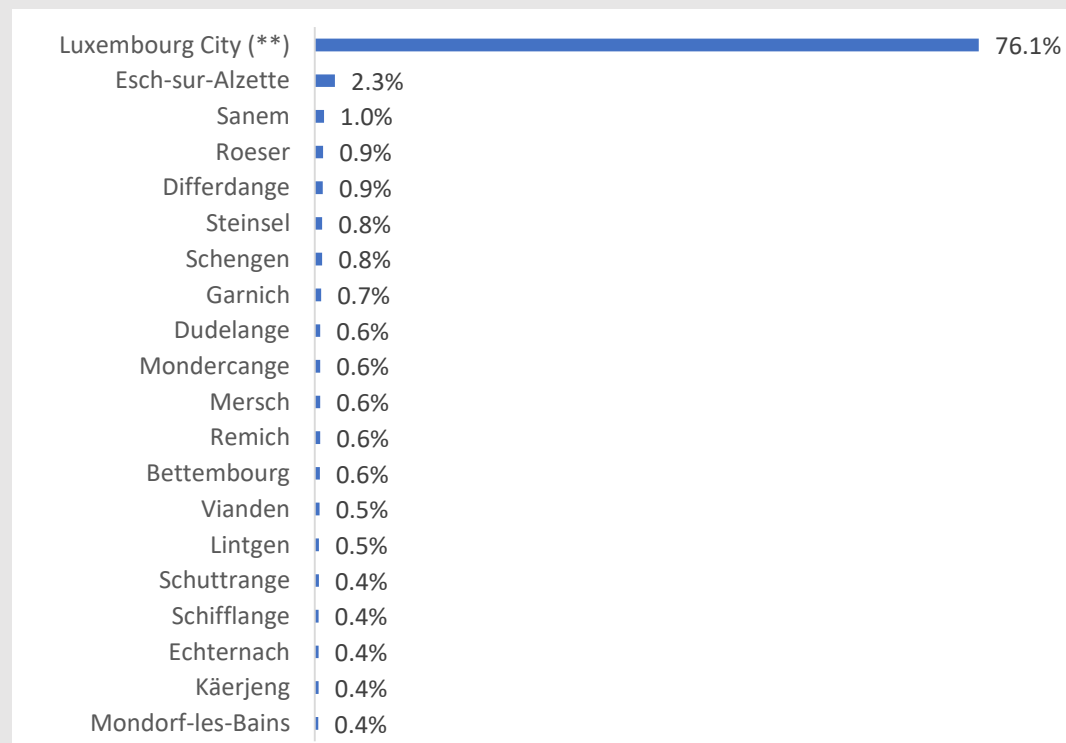
Type of places and cities visited in Luxembourg



Places visited during leisure overnight stays¹



Top cities visited during Italian 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

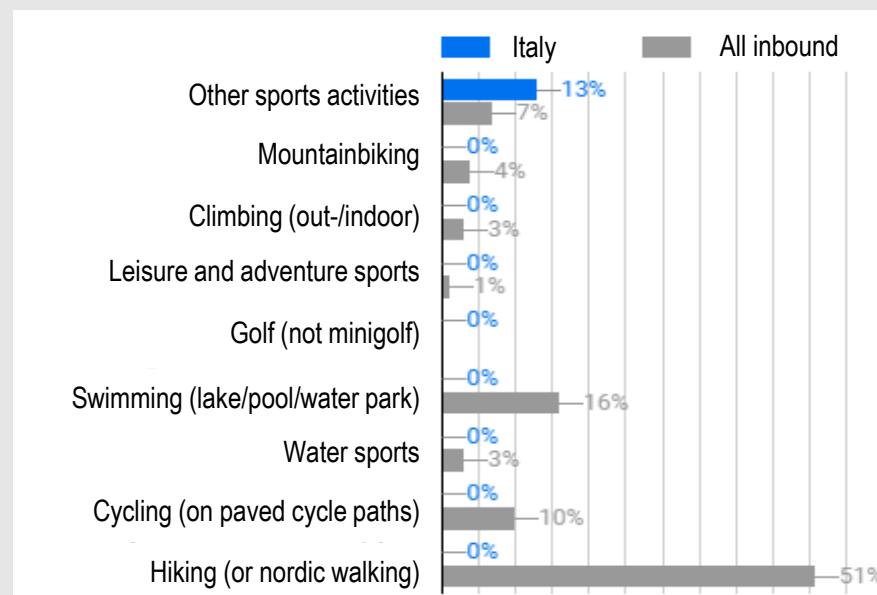
Inbound leisure visitors with overnight, 2020-2022



Non-sporting activities



Sporting activities

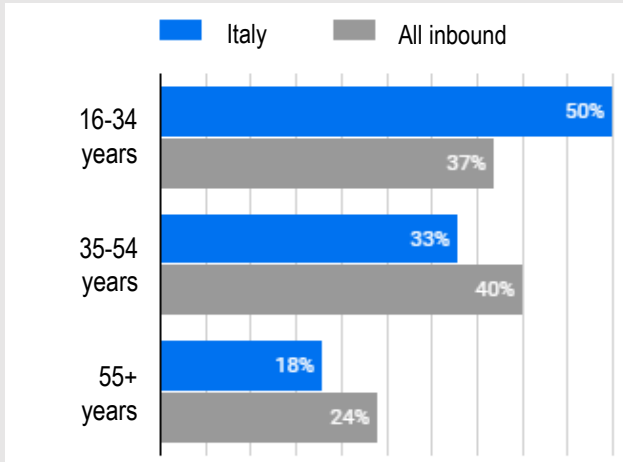


Transport, travel party, age, repeat visits and cross-border trips

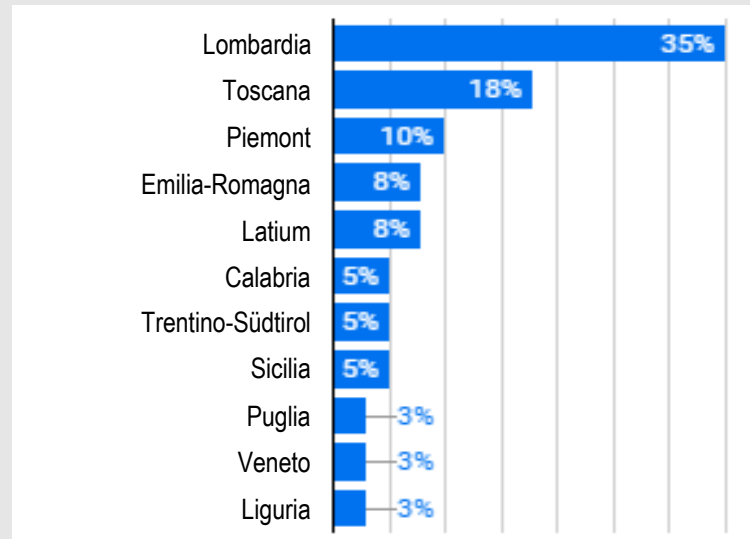
Inbound leisure visitors with overnight, 2020-2022



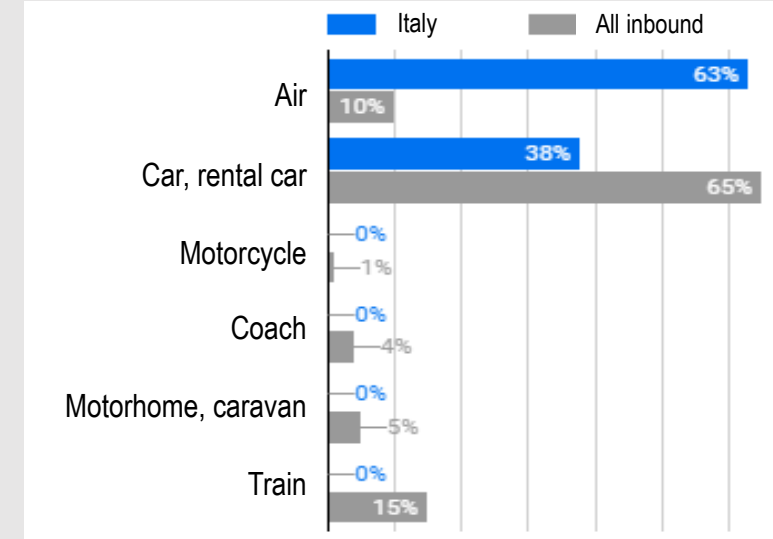
Age groups



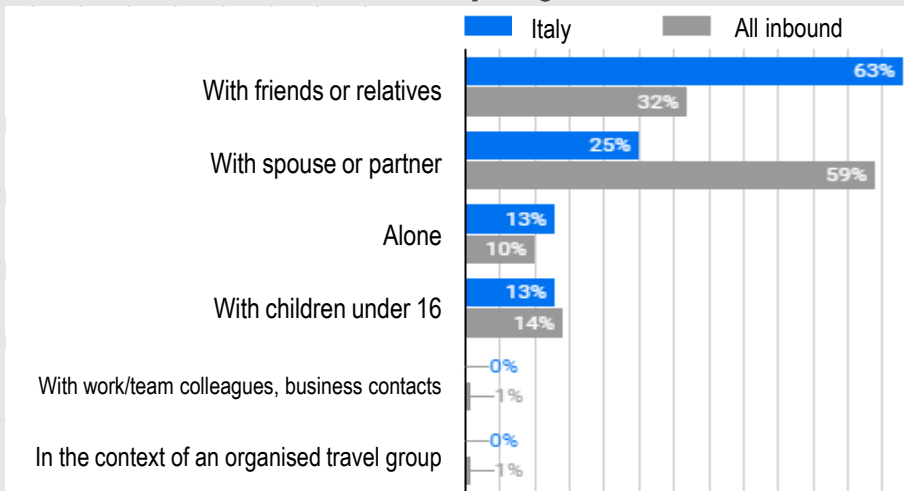
Region of origin



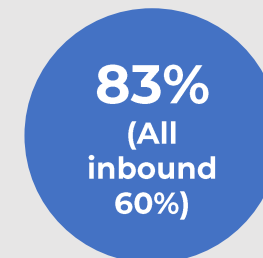
Mode of transport to access Luxembourg



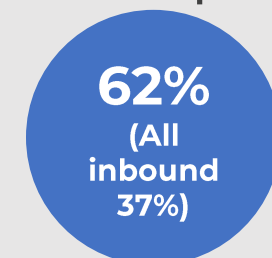
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

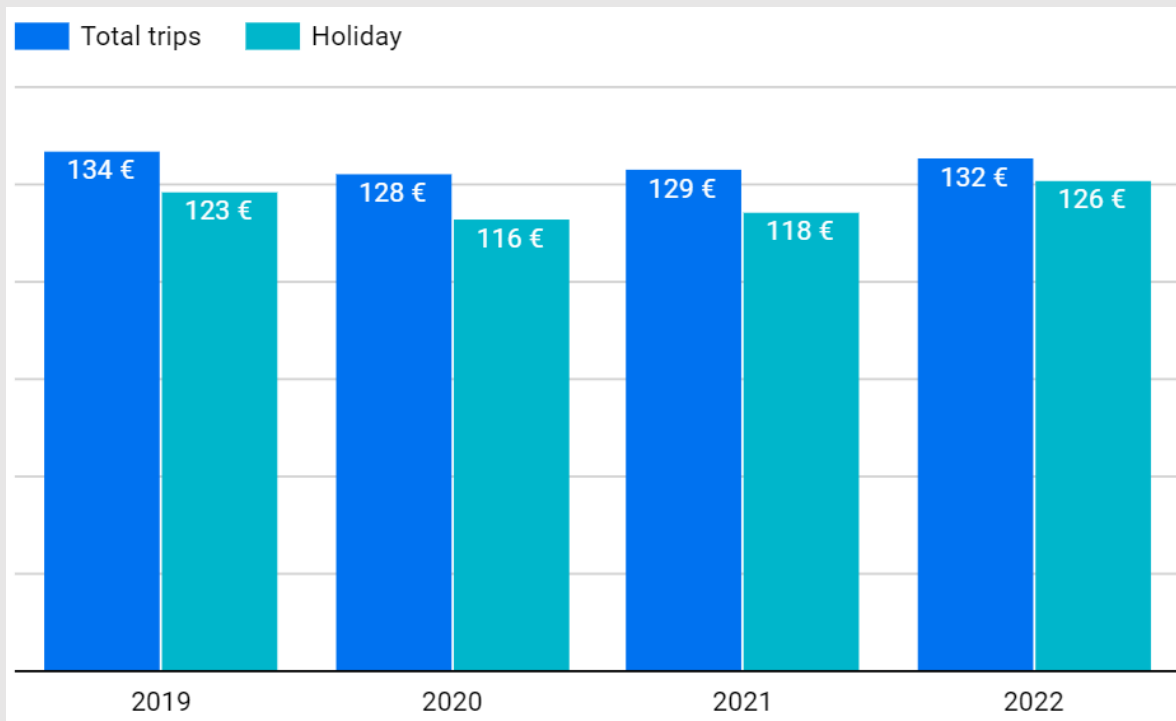


Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

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



2022

Italy to
Luxembourg

Europe to
Luxembourg

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

132 €

124 €

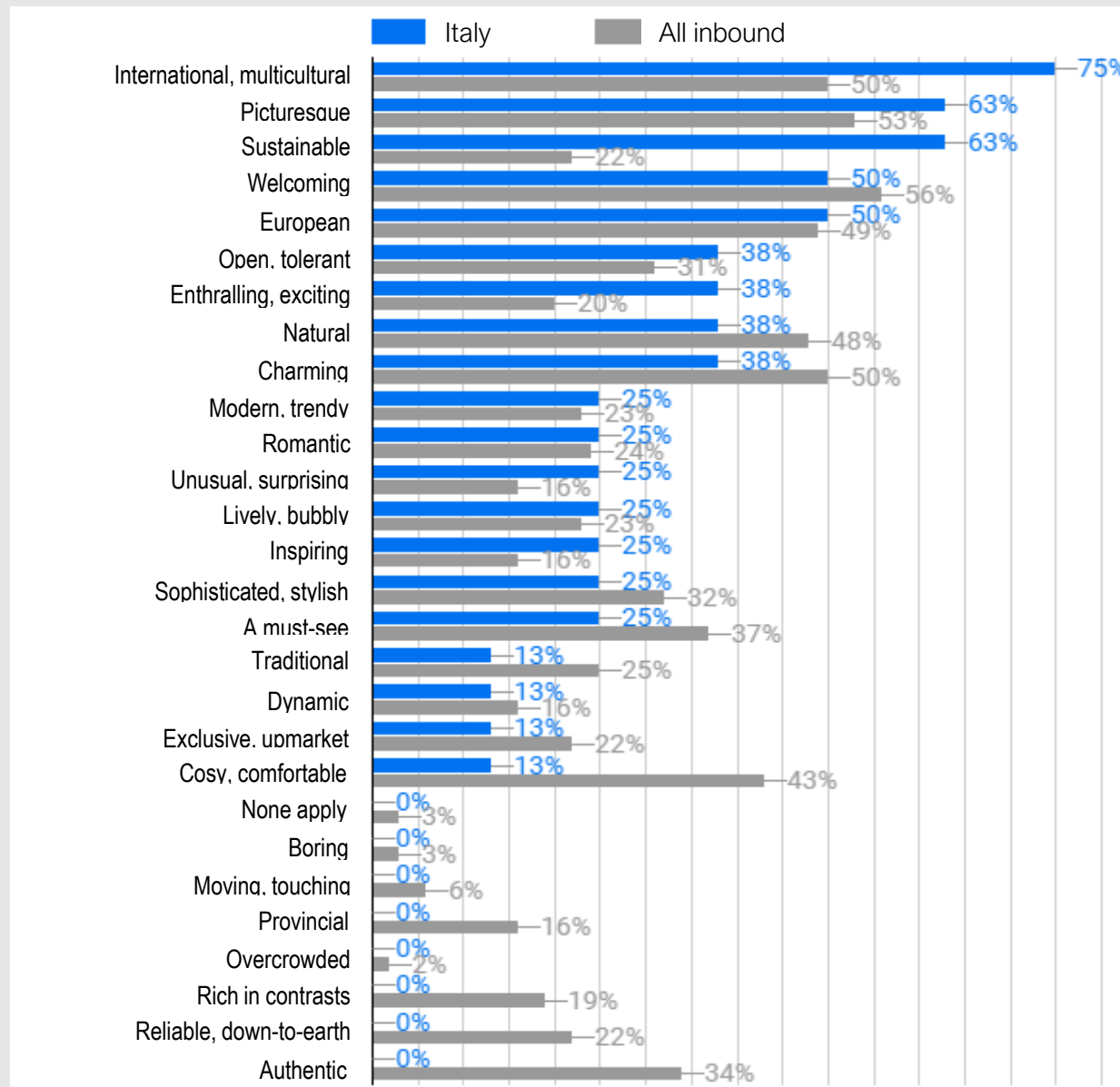
Spend/day/pers. on **holiday** trips

126 €

118 €

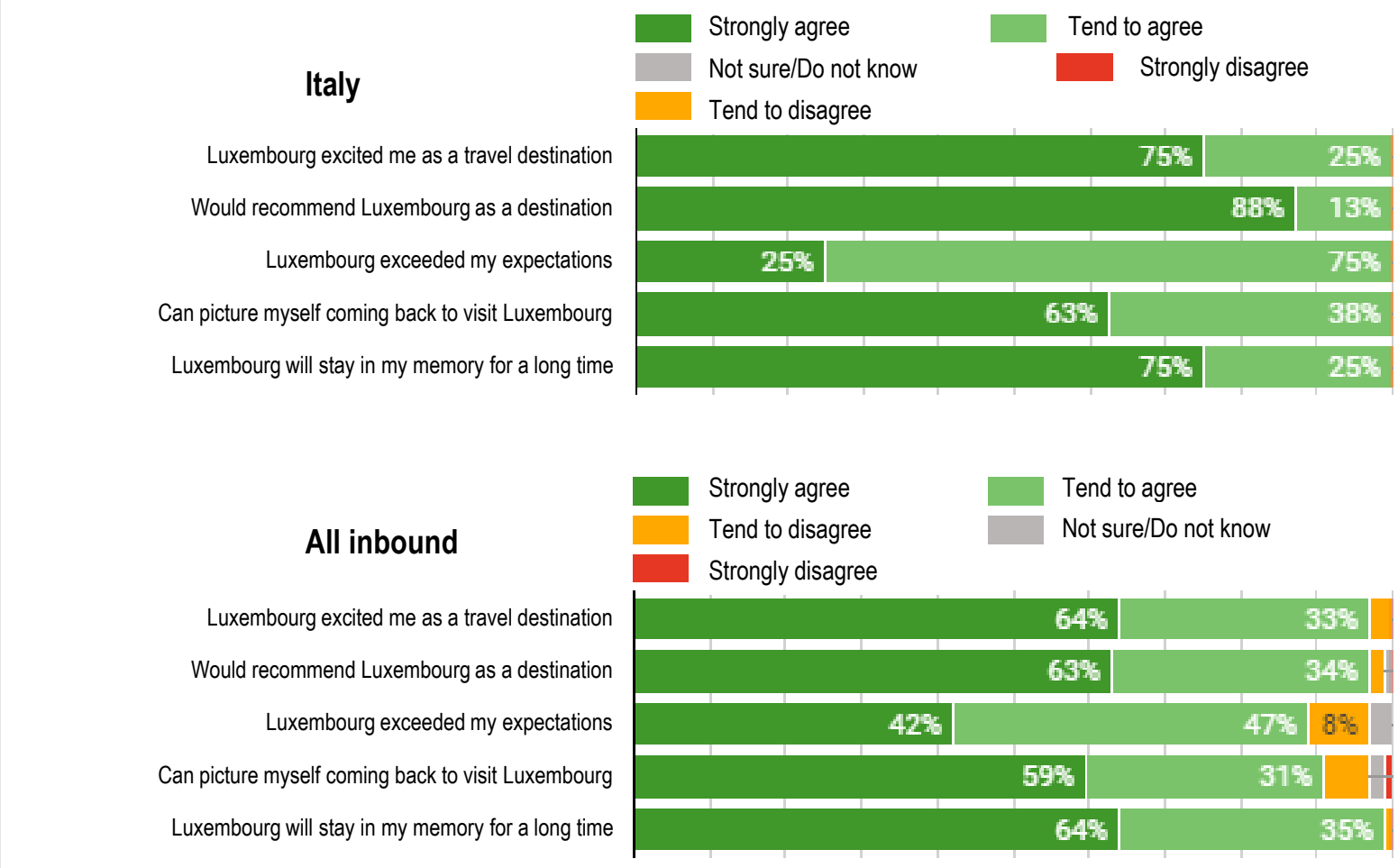
Image perception of Luxembourg

Leisure overnight visitors



Visitor satisfaction and recommendation

Inbound leisure visitors, 2020-2022



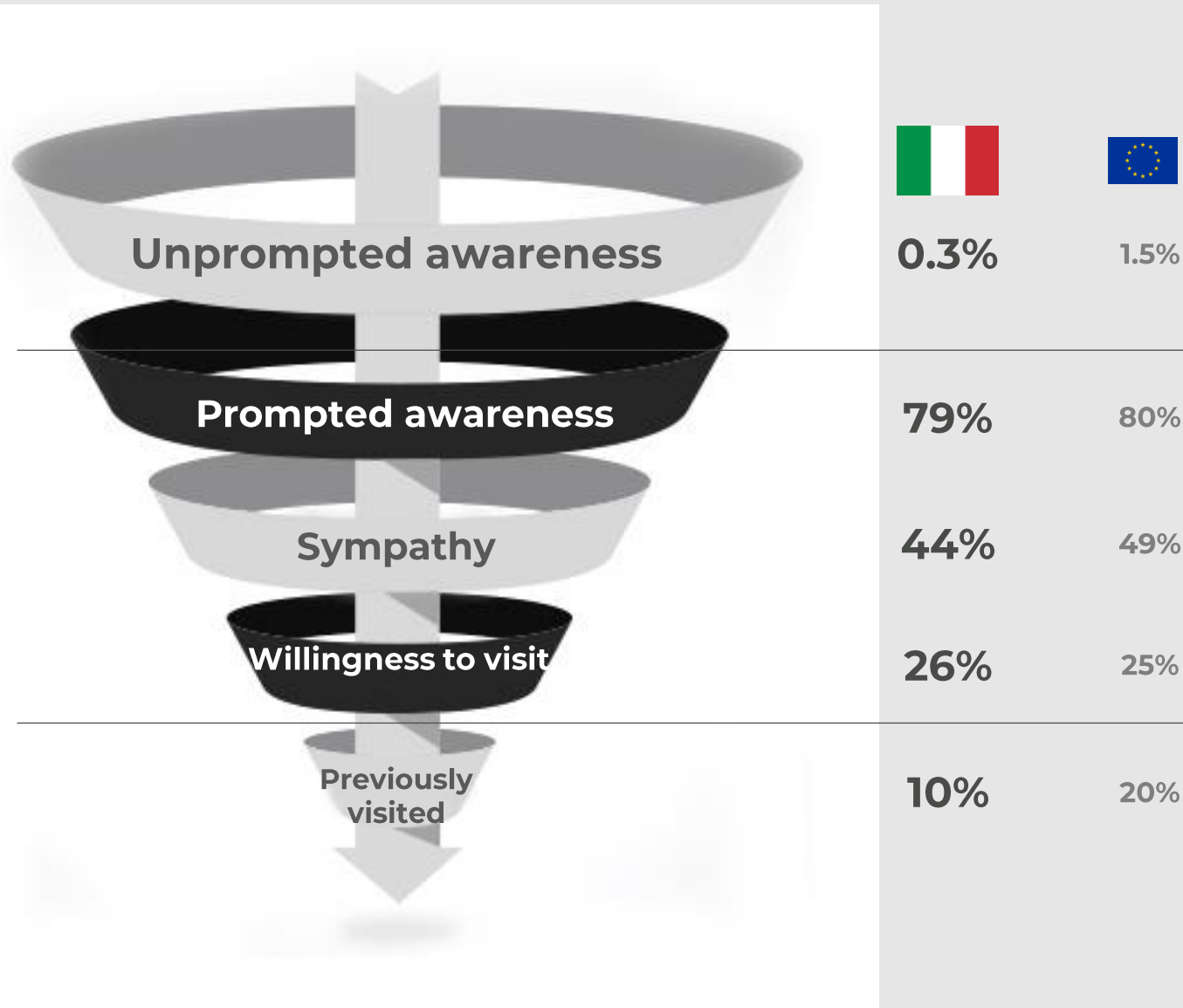
Source: LFT/Ilres Visitor Survey, 2020-2022.



Target segments, Brand & Growth Potential

Brand Funnel 2021-2022

Assessing Luxembourg's brand strength as a destination



Total future visitor potential from Italy (*)

12.0 million

Highest future travel intent from Italy (**)

1. Nature-Loving Actives
2. Perfection Seekers
3. Leisure Oriented

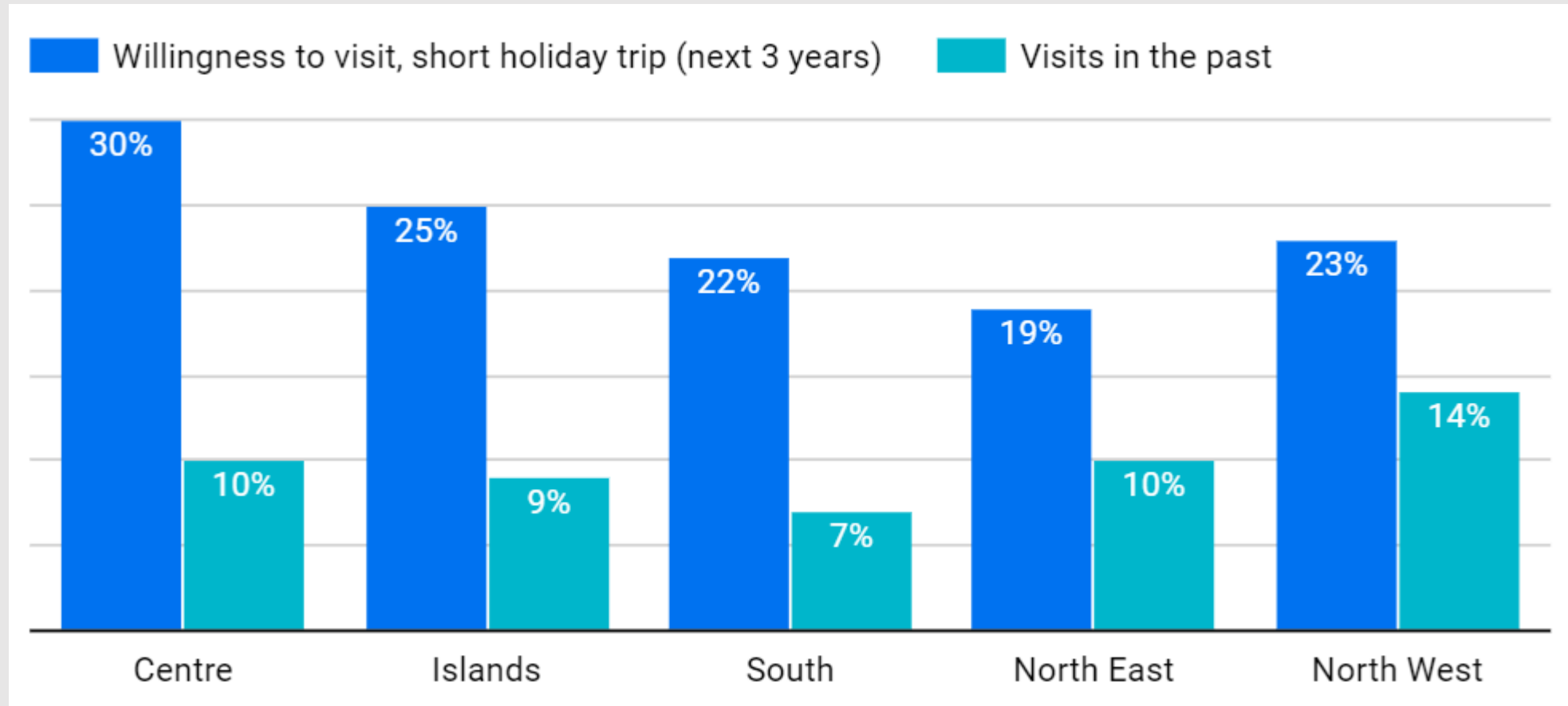
Source: Destination Brand/Inspektour.

(*) 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



General theme interest (*)



Theme			
	Rank	Rank	% interested
City	4	1	80%
Castles	5	2	73%
Culinary	2	3	72%
Nature	3	4	72%
Resting/Relaxation	1	5	67%
History/Unesco	7	6	65%
Culture	6	7	61%
Hiking	8	8	55%
Sustainability	9	9	52%
Nightlife (**)	12	10	50%
Events	14	11	46%
Countryside	15	12	42%
Shopping	10	13	41%
Family	11	14	40%
Active-sports	16	15	38%
Wellness	13	16	36%
Industrial heritage	17	17	34%
Cycling	18	18	30%
MTB	19	19	19%
Motorcycling	20	20	19%

(*) 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	54%
Castles	3	2	48%
Culture	4	3	46%
Resting/Relaxation	2	4	42%
Hiking	10	5	40%
History/Unesco	8	6	37%
Nature	7	7	36%
Cycling	12	8	35%
Nightlife (***)	11	9	32%
Shopping	5	10	32%
Culinary	6	11	31%
Wellness	9	12	29%
Active-sports	14	13	25%
Family	13	14	25%
MTB	15	15	22%

Growth potential for themes (**)

- Culinary & Wine
- History/Unesco
- Nature

(*) 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
Service-oriented	7	1	35%
Welcoming, hospitable	2	2	33%
Sustainable	10	3	32%
Attractive, appealing	4	4	32%
Open-minded, tolerant	3	5	31%
Authentic	1	6	31%
Surprising	5	7	30%
Not crowded, insider tip	8	8	30%
Lot of variety, diversified	6	9	28%
Lively, hip	9	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.

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
3	Image	Image: EXP. Activating: PS, NLA.

Theme & segment focus

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

Brand Value focus

Theme	Priority	Segments
Lot of variety	1	EXP
Authentic	1	
Lively/hip	1	
Surprising	2	
Welcoming	2	



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