Luxembourg for Tourism

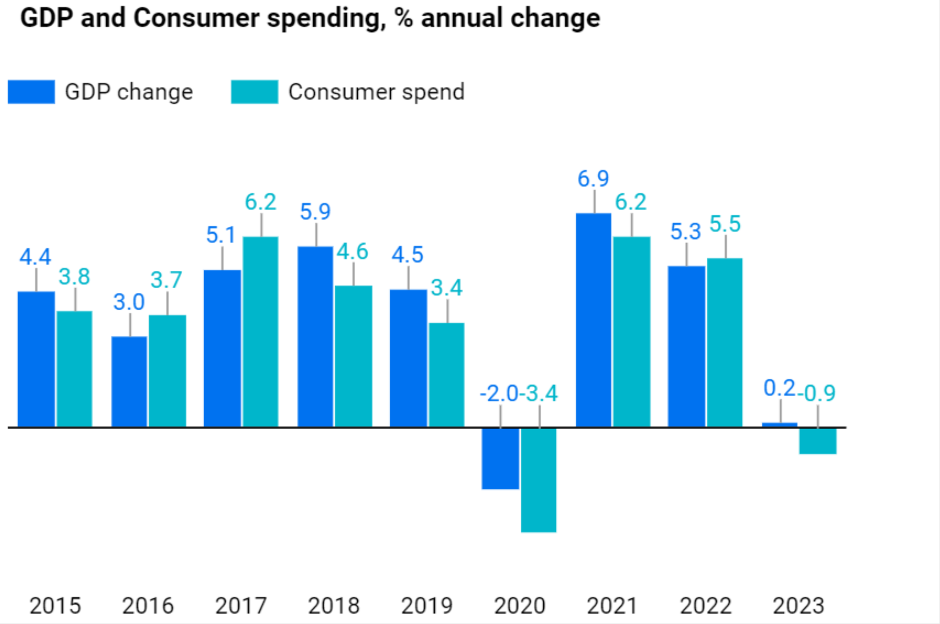
Market profile POLAND 2023

Economic indicators & General Travel Demand

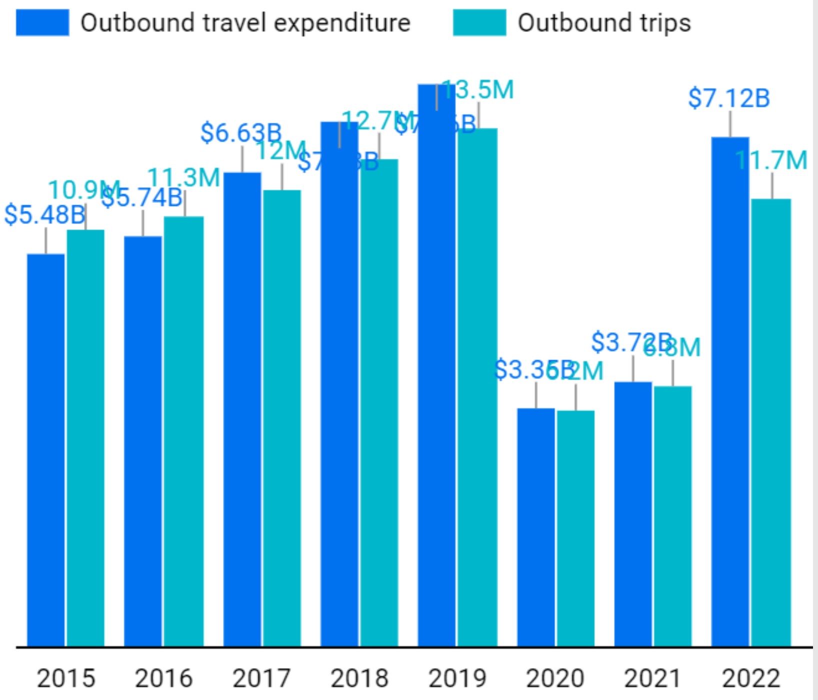
Economic indicators - General travel demand

Economy & population

GDP ($) per capita	Unemployment (%)	Population (mn)	Inflation (%)
21,996	2.8	36.8	11.4

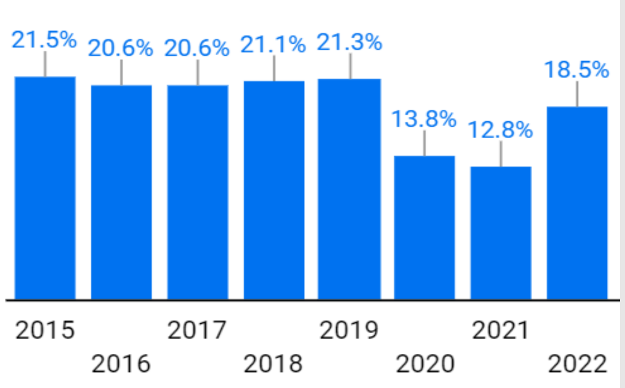


Outbound trips and travel expenditure

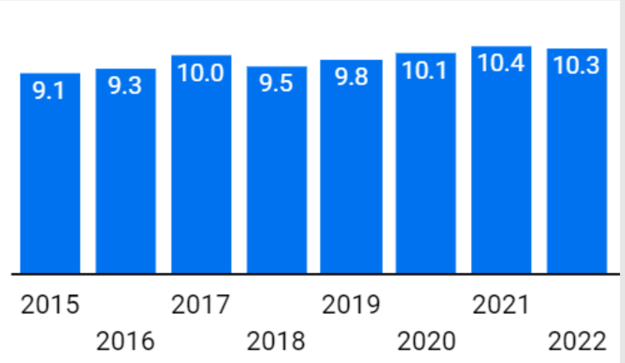


Average spend
per outbound trip (2019)
580 $

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of short trips (1-3 nights),
% all outbound trips (2022)
19.3%

Outbound travel intensity
0.36 trips
per inhabitant (2019)

Share of leisure,
% all outbound trips (2022)
89.5%

Sources: Eurostat, IMF.

Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation
2023

Nights,
paid accommodation, 2023

25.588

+6% (vs. 2022)
+12% (vs. 2019)

Arrivals,
paid accommodation, 2023

10.034

+25% (vs. 2022)
+19% (vs. 2019)

Average length of stay,
paid accommodation, 2023

2.55 days

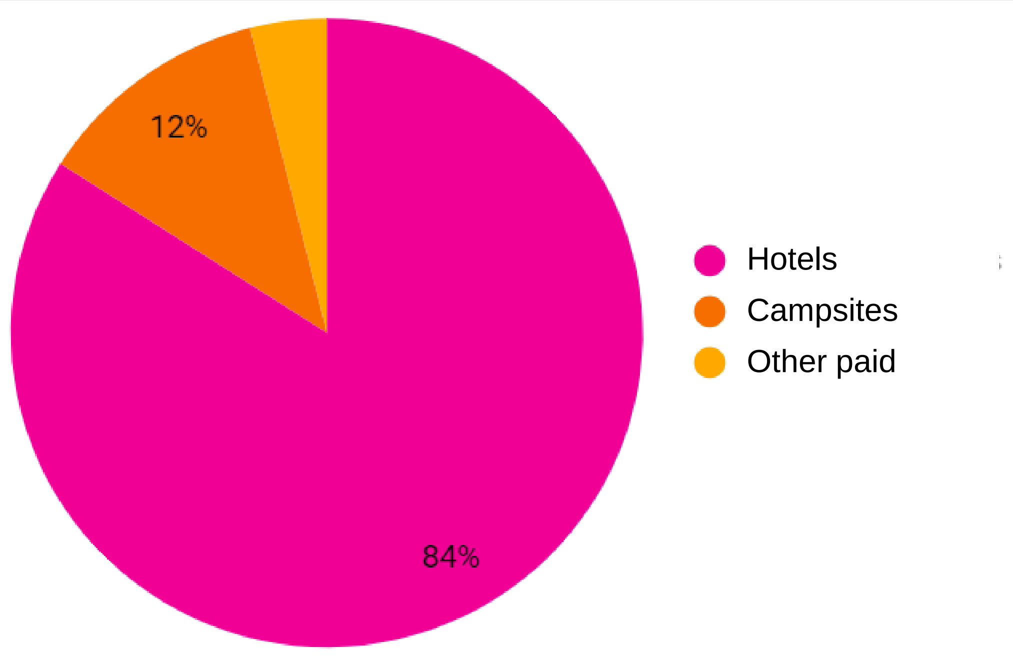
-0.44 days (vs. 2022)
-0.15 days (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

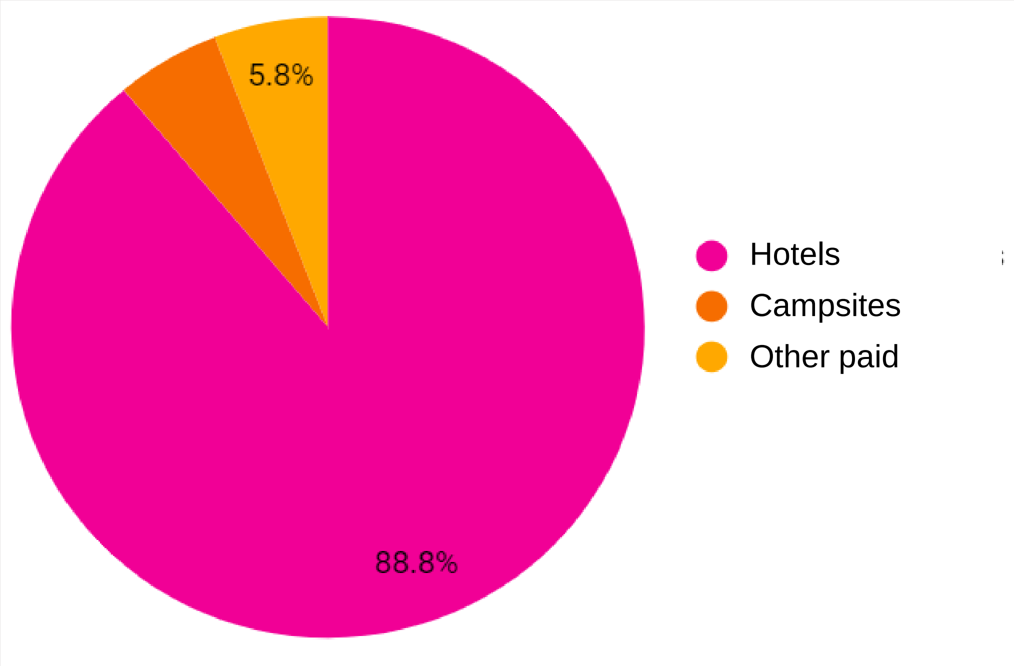
Type of accommodation, 2023

Nights, paid accommodation, 2023



Hotels	**21.505**	+8% (vs. 2022)	+25% (vs. 2019)
Campsites	**3.082**	-1% (vs. 2022)	+21% (vs. 2019)
Other paid accomm.	**1.001**	-3% (vs. 2022)	-68% (vs. 2019)

Arrivals, paid accommodation, 2023



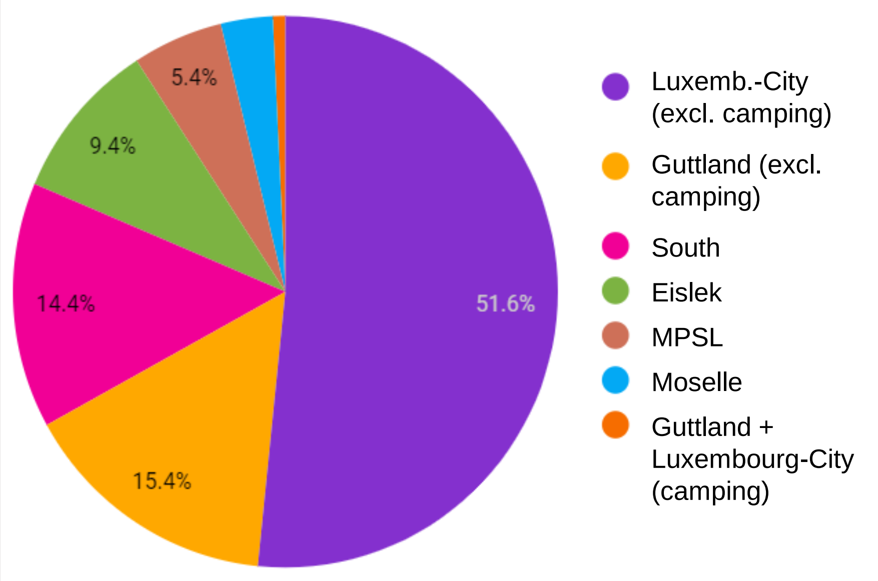
Hotels	**8.914**	+25% (vs. 2022)	+22% (vs. 2019)
Other paid accomm.	**585**	+8% (vs. 2022)	-33% (vs. 2019)
Campsites	**535**	+45% (vs. 2022)	+74% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

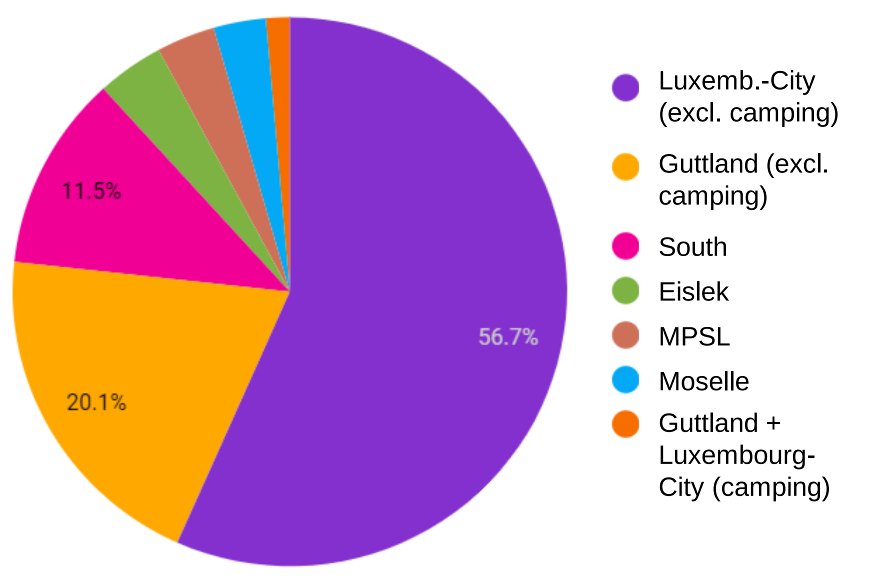
Regions, 2023

Nights, paid accommodation, 2023



Lux.-City (excl. camping)	13.206	+42% (vs. 2022)	+27% (vs. 2019)
Guttland (excl. camping)	3.932	+15% (vs. 2022)	-6% (vs. 2019)
South	3.688	-48% (vs. 2022)	+21% (vs. 2019)
Eislek	2.410	-19% (vs. 2022)	-38% (vs. 2019)
MPSL	1.374	+94% (vs. 2022)	+129% (vs. 2019)
Moselle	789	+95% (vs. 2022)	+26% (vs. 2019)
Guttland/Lux.-City (camping)	189	+14% (vs. 2022)	+75% (vs. 2019)

Arrivals, paid accommodation, 2023

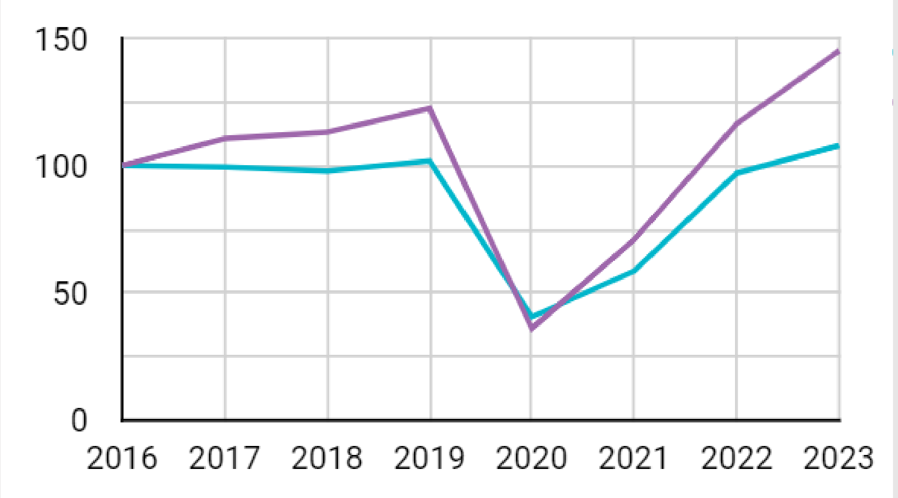


Lux.-City (excl. camping)	5.686	+38% (vs. 2022)	+24% (vs. 2019)
Guttland (excl. camping)	2.014	+28% (vs. 2022)	+24% (vs. 2019)
South	1,155	-24% (vs. 2022)	-8% (vs. 2019)
Eislek	391	+13% (vs. 2022)	-9% (vs. 2019)
MPSL	343	+70% (vs. 2022)	+37% (vs. 2019)
Moselle	306	+54% (vs. 2022)	+28% (vs. 2019)
Guttland/Lux.-City (camping)	139	+35% (vs. 2022)	+72% (vs. 2019)

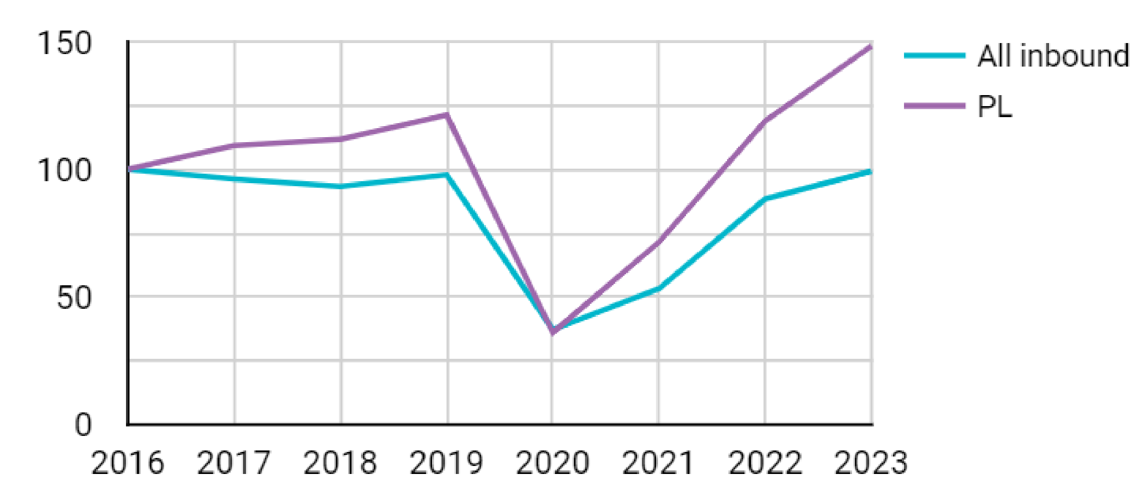
Source: Statec

Arrivals in paid accommodation
Trends 2016-2023

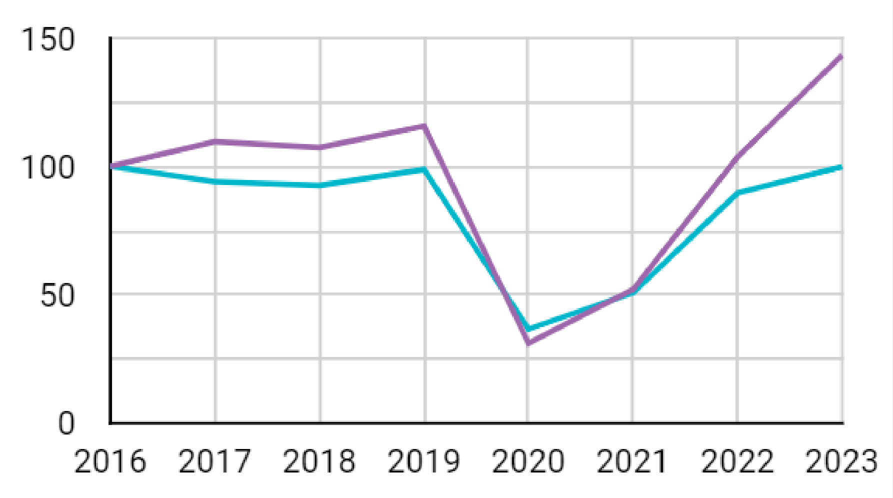
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



(*) excluding camping.
Source: Statec

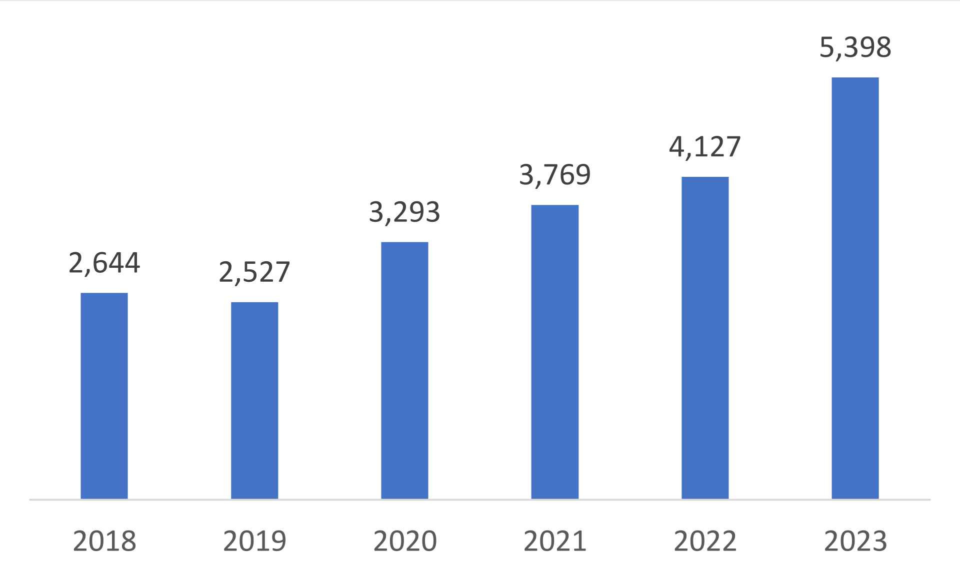
Short–term rentals

**Nights,
Short-term rentals, 2023**

5.398

+31% (vs. 2022)
+114% (vs. 2019)

**Nights,
Short-term rentals, 2018-2023**



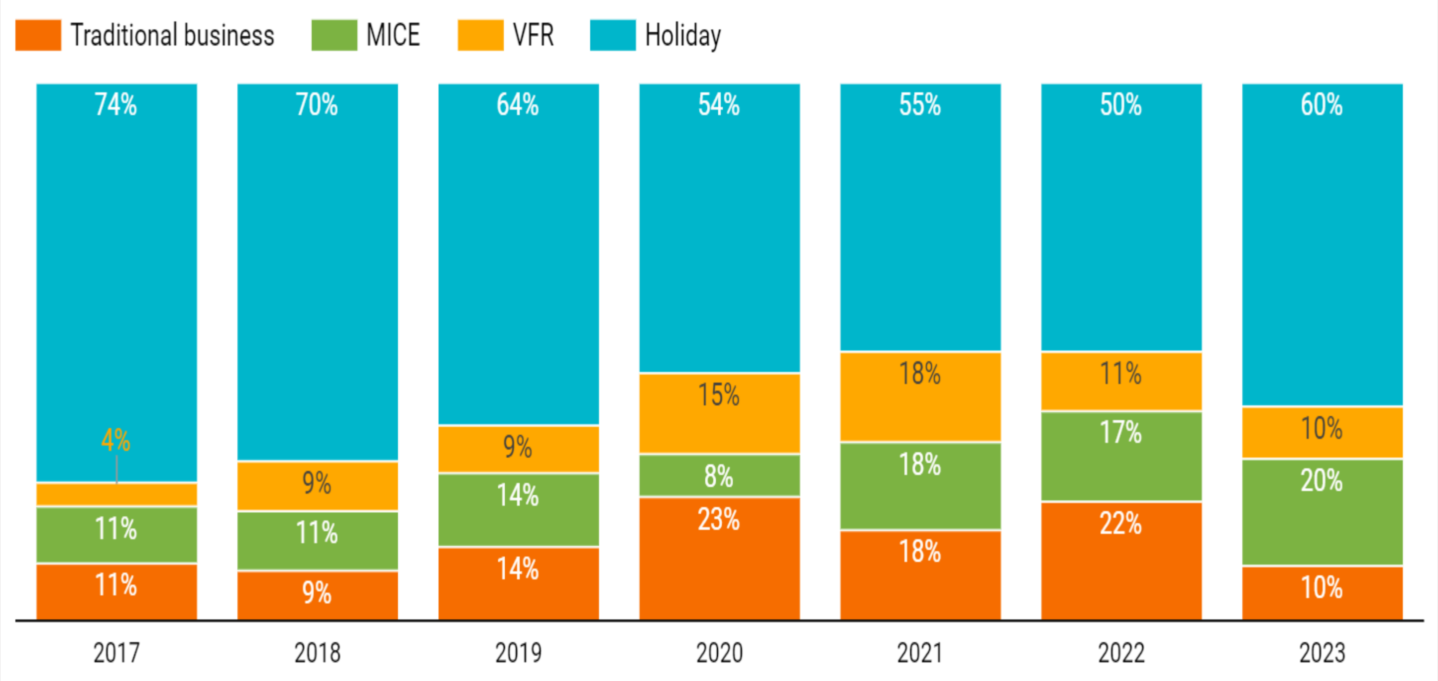
Source: Eurostat (experimental statistics).

Characteristics of Polish inbound trips to Luxembourg

Polish trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2017-2023

Polish trips to Luxembourg, 2017-2023



2023

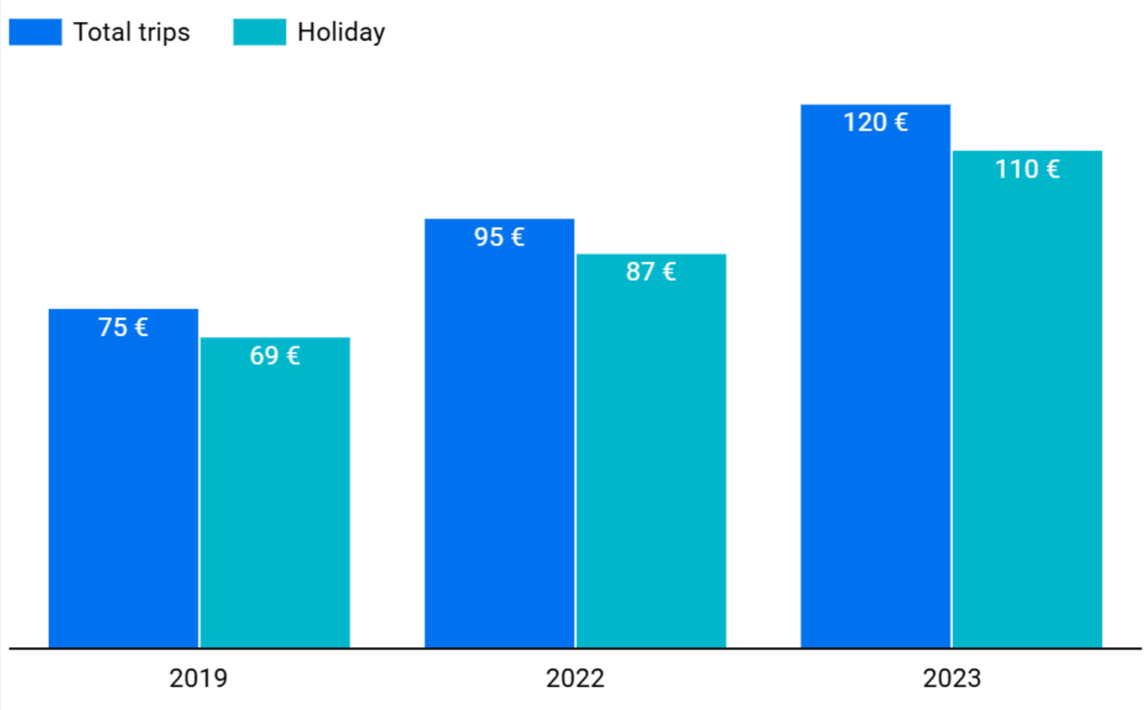
	Poland to Luxembourg	**Europe to** Luxembourg
Holiday	60%	62%
VFR	10%	15%
MICE	20%	14%
Traditional Business	10%	9%

Source: World Travel Monitor/IPK International.

Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

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



2023

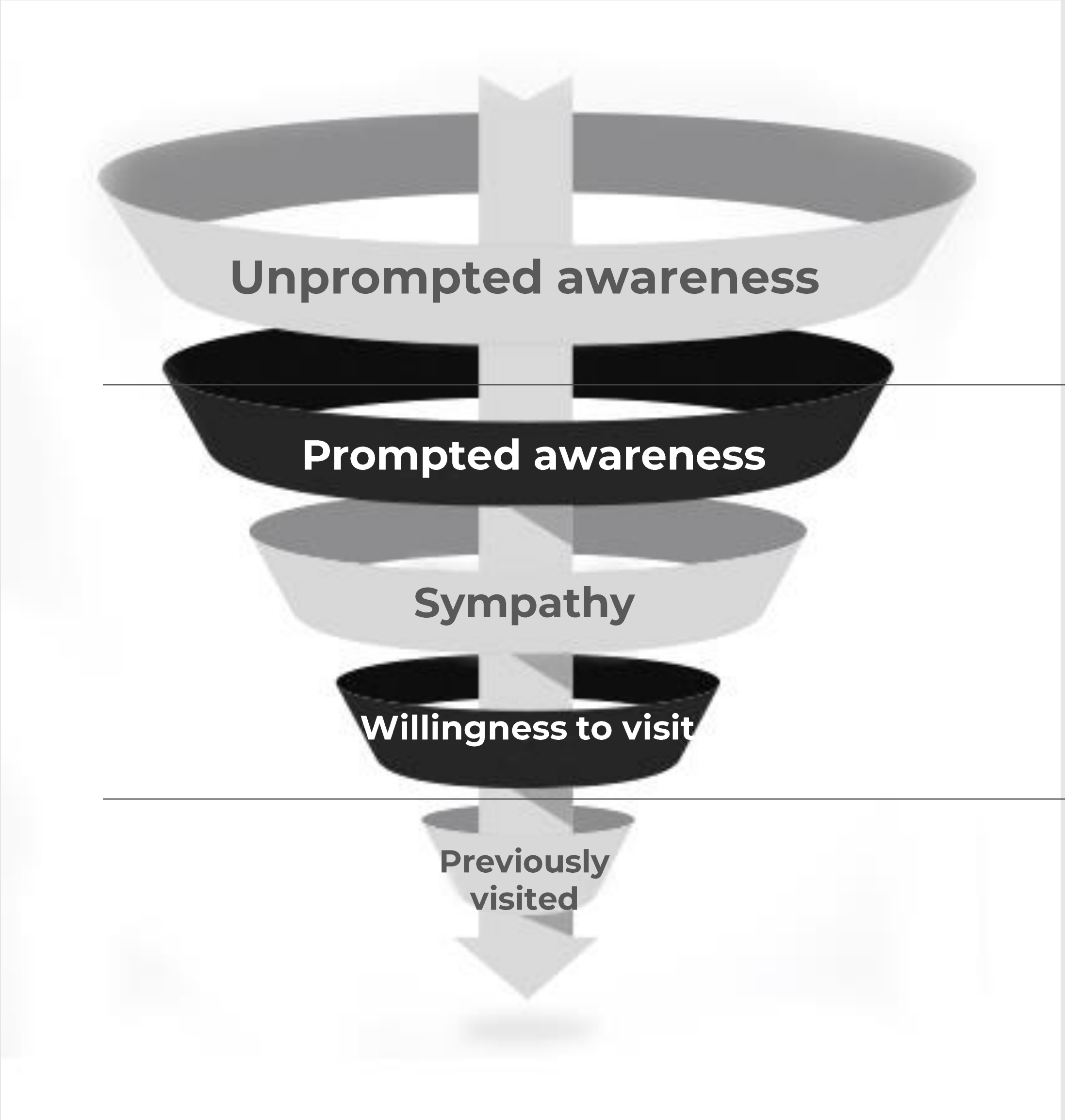
	Poland to Luxembourg	Europe to Luxembourg
Spend/day/pers. on **all** trips	120 €	152 €
Spend/day/pers. on **holiday** trips	110 €	144 €

Source: World Travel Monitor/IPK International.

Brand strength & Growth potential

Brand Funnel 2022

Assessing Luxembourg’s brand strength as a destination



0.0%	1.5%
76%	82%
50%	55%
25%	15%
7%	20%

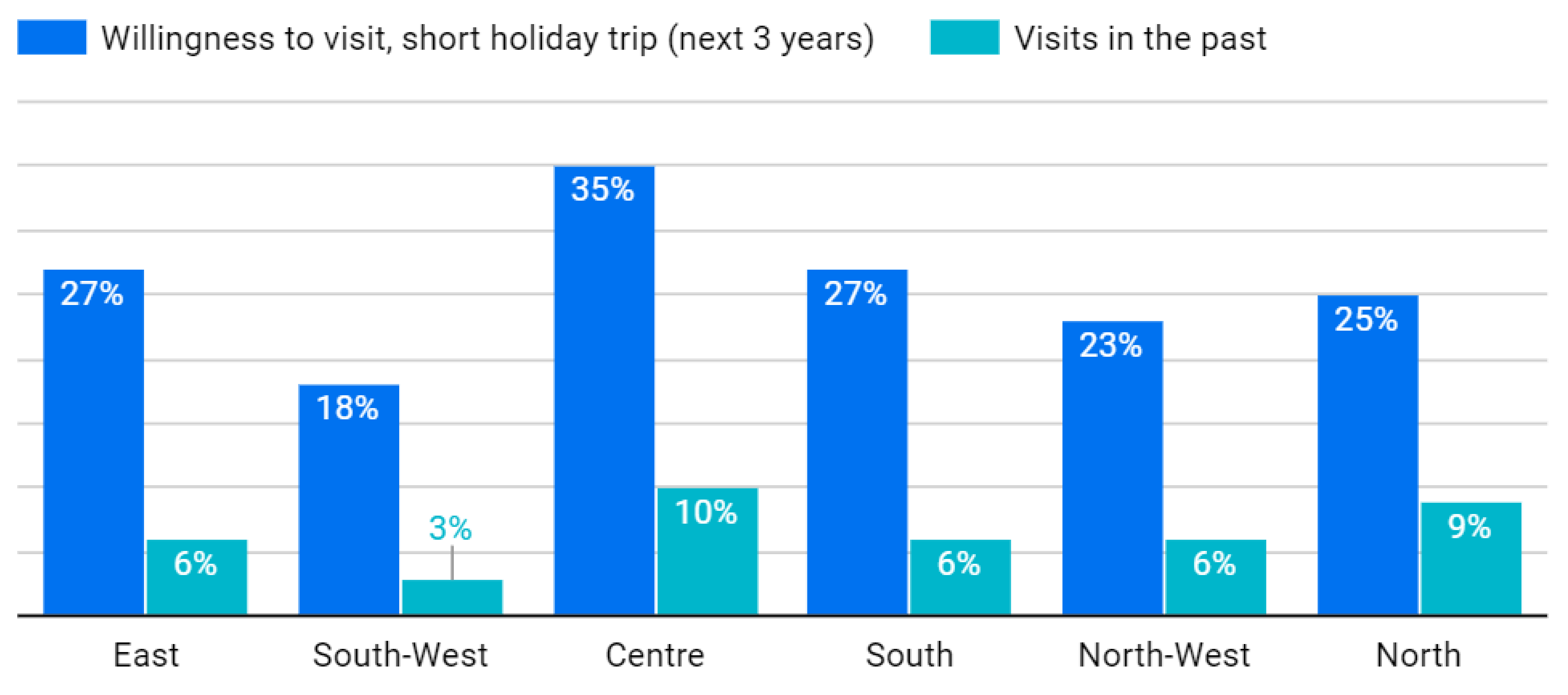
Total future visitor potential from Poland (*)

7.2 million

Source: Destination Brand/Inspektour.
(*) Based on travel intent for next 3 years.

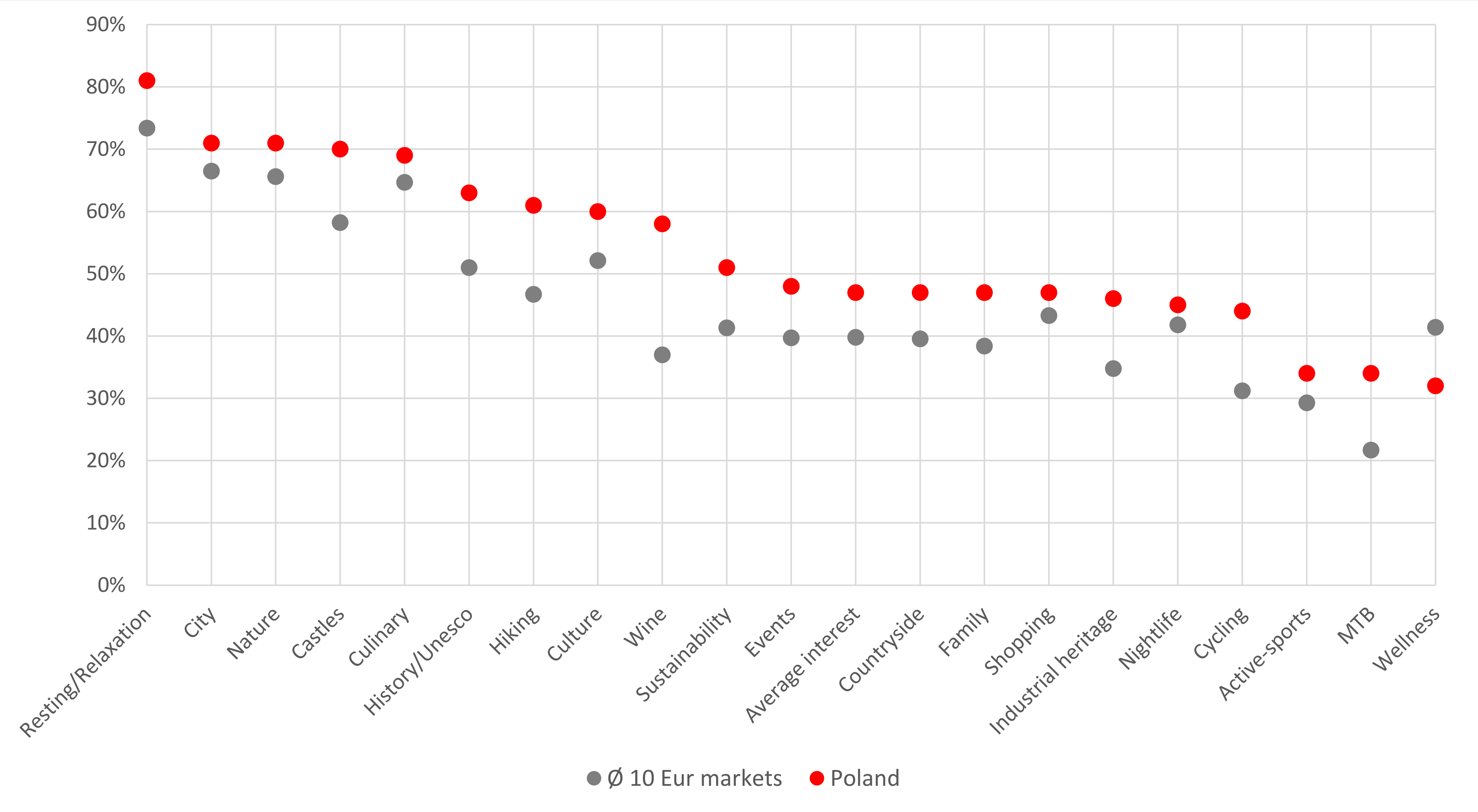
Regional origin 2022

Past visitors and future potential



Source: Destination Brand/Inspektour.

General theme interest (*)

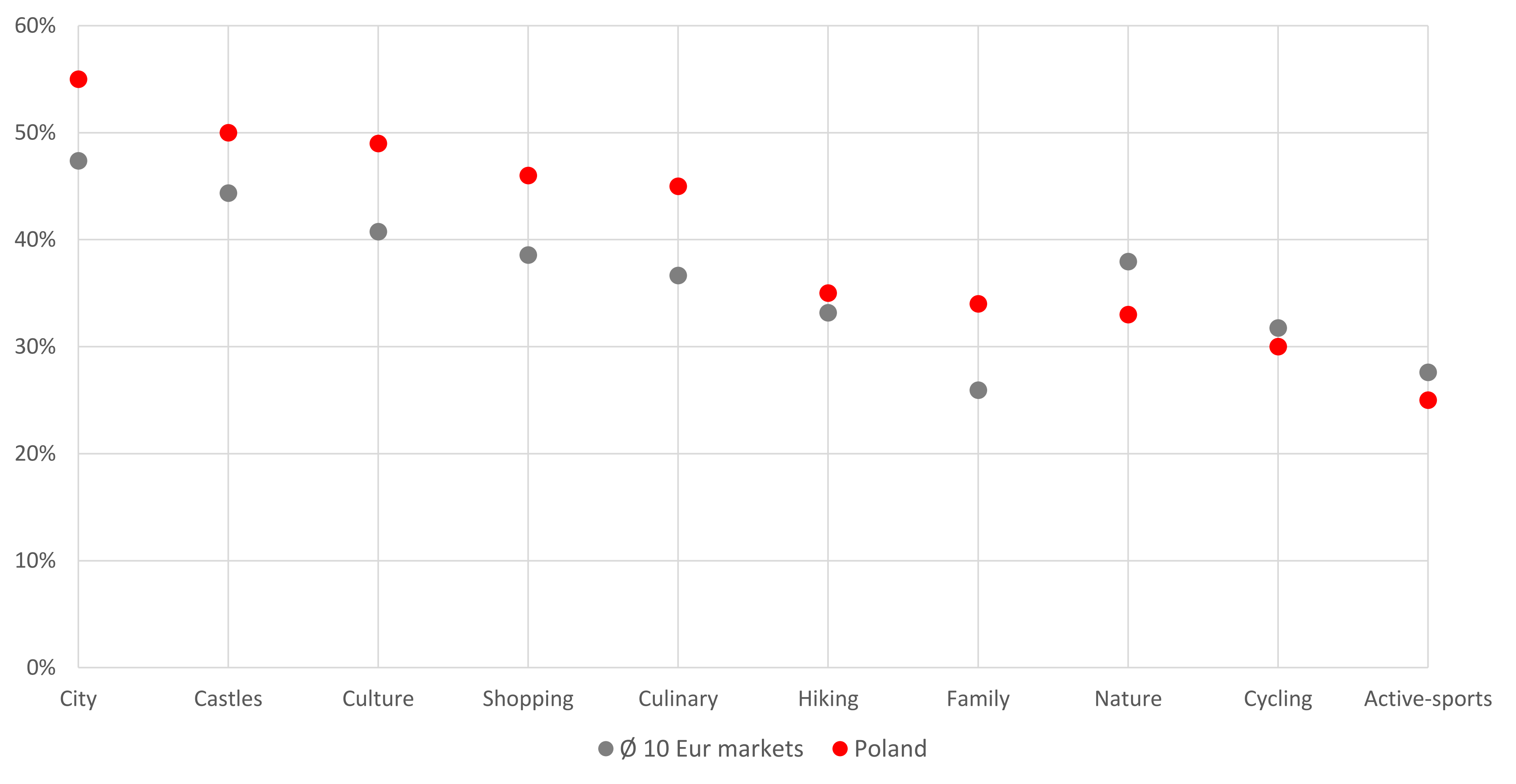


(*) Interest in themes with regard to holiday trips with overnight (regardless of specific destinations)

Ø 10 Eur markets : cumulated average values for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL.

Source: Destination Brand/Inspektour.

Luxembourg's Theme Competence (*)



Growth potential for themes (**)

- Culinary & Wine
- Castles
- Nature
- Hiking & Cycling

(*) 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.

Ø 10 Eur markets : cumulated average values for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL.

Source: Destination Brand/Inspektour.

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