

Luxembourg for Tourism

Market profile

SPAIN

2022



Economic indicators & General Travel Demand

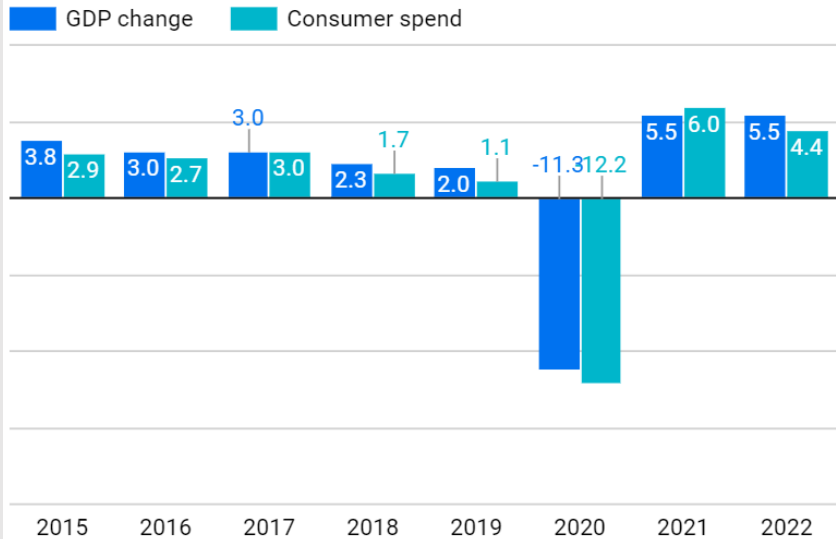
Economic indicators – General travel demand



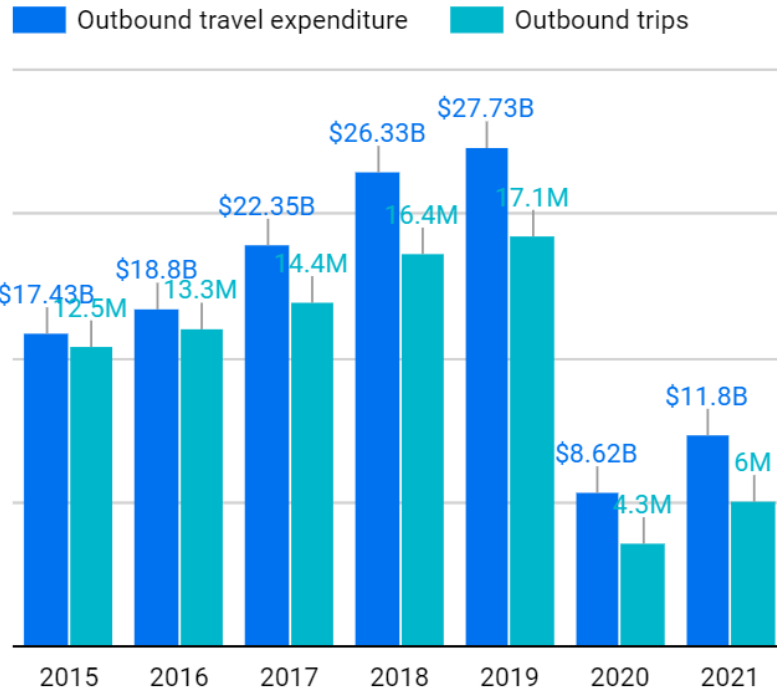
Economy & population

GDP (PPP) per capita **\$38,945** Unemployment (%) **13.9** Population (mn) **47.5** Inflation (%) **8.4**

GDP and Consumer spending, % annual change



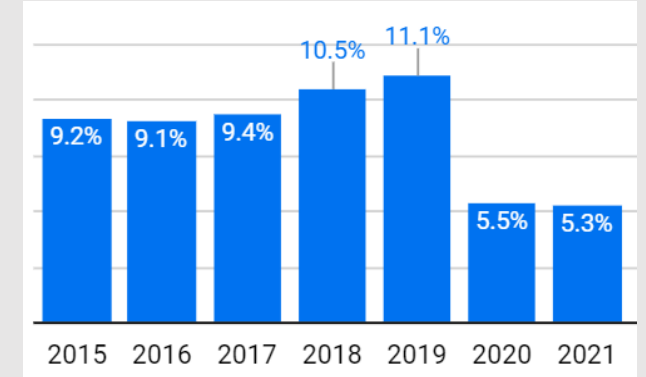
Outbound trips and travel expenditure



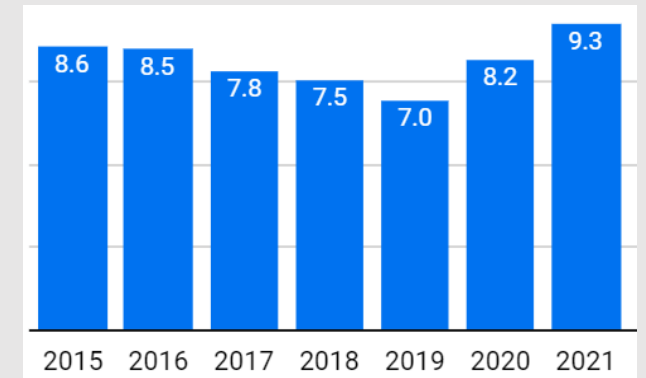
Average spend per outbound trip (2019)
1.619 \$

Outbound travel intensity
0.36 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)
89.0%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2022



**Nights,
paid accommodation, 2022**



+93% (vs. 2021)
-6% (vs. 2019)

**Arrivals,
paid accommodation, 2022**



+122% (vs. 2021)
-11% (vs. 2019)

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



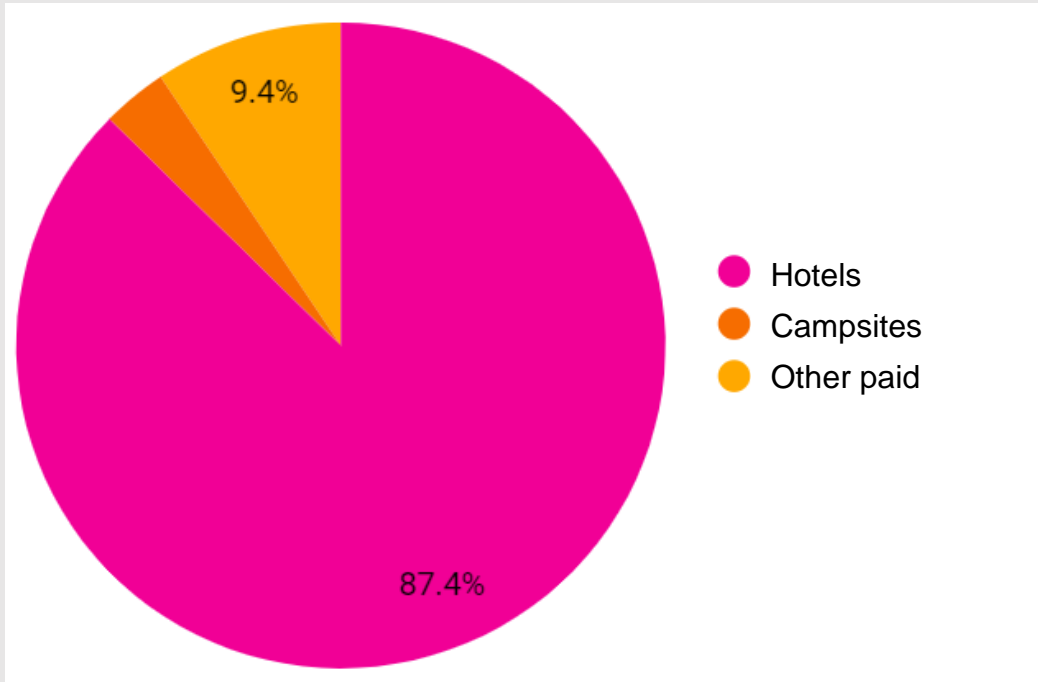
-0.29 days (vs. 2021)
+0.09 days (vs. 2019)

Nights & arrivals in paid accommodation

Type of accommodation, 2022

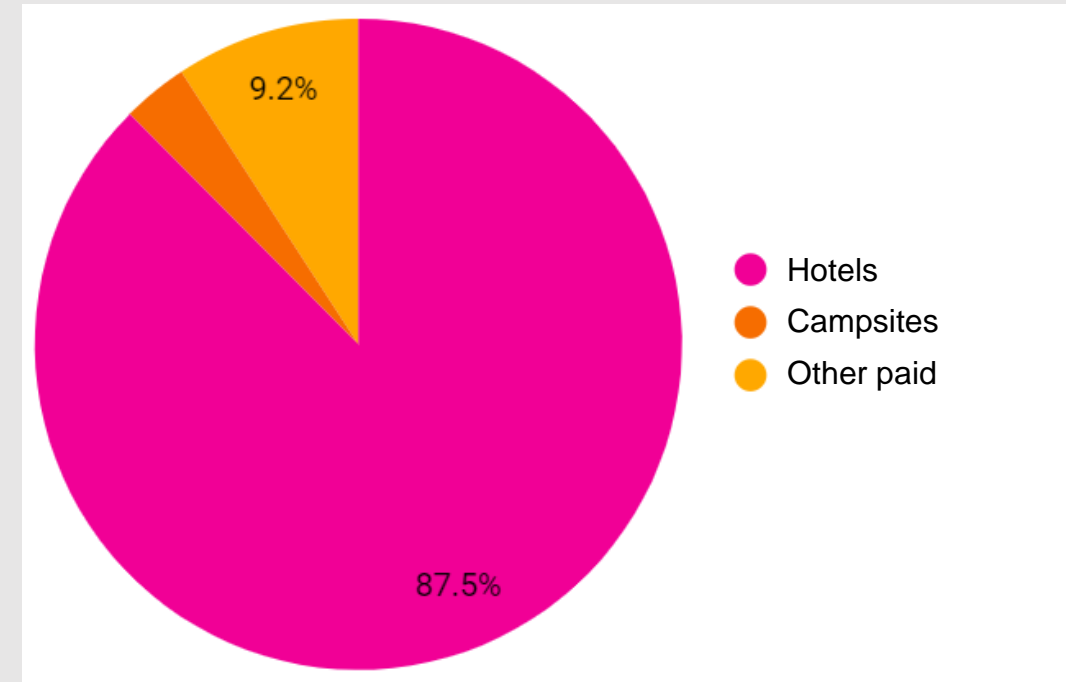


Nights, paid accommodation



Hotels	37.290	-8% (vs. 2019)
Campsites	1.392	+56% (vs. 2019)
Other paid	3.998	-3% (vs. 2019)

Arrivals, paid accommodation



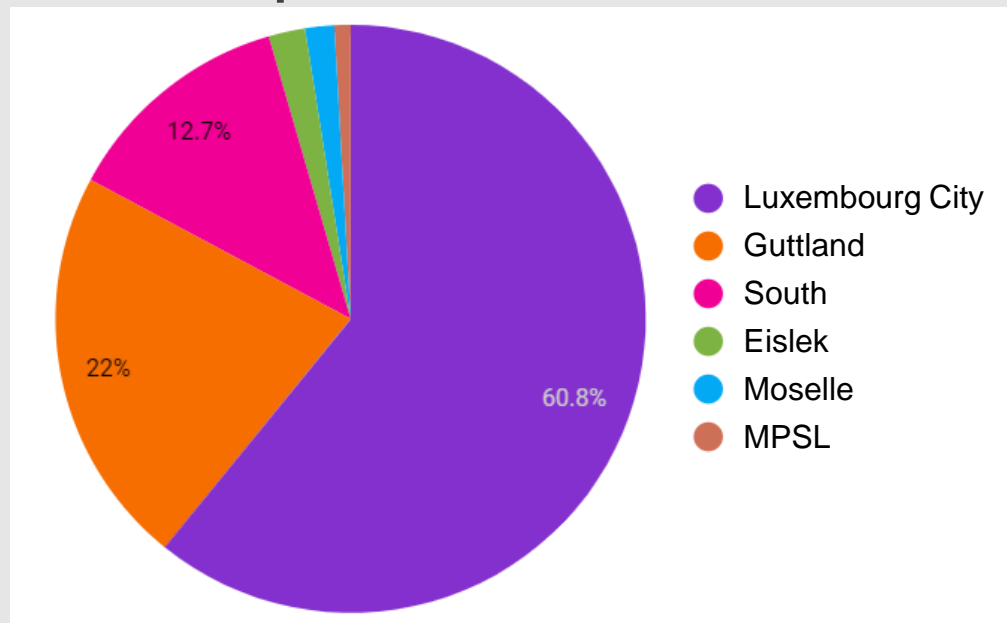
Hotels	19.397	-13% (vs. 2019)
Campsites	726	+180% (vs. 2019)
Other paid	2.042	-8% (vs. 2019)

Nights & arrivals in paid accommodation

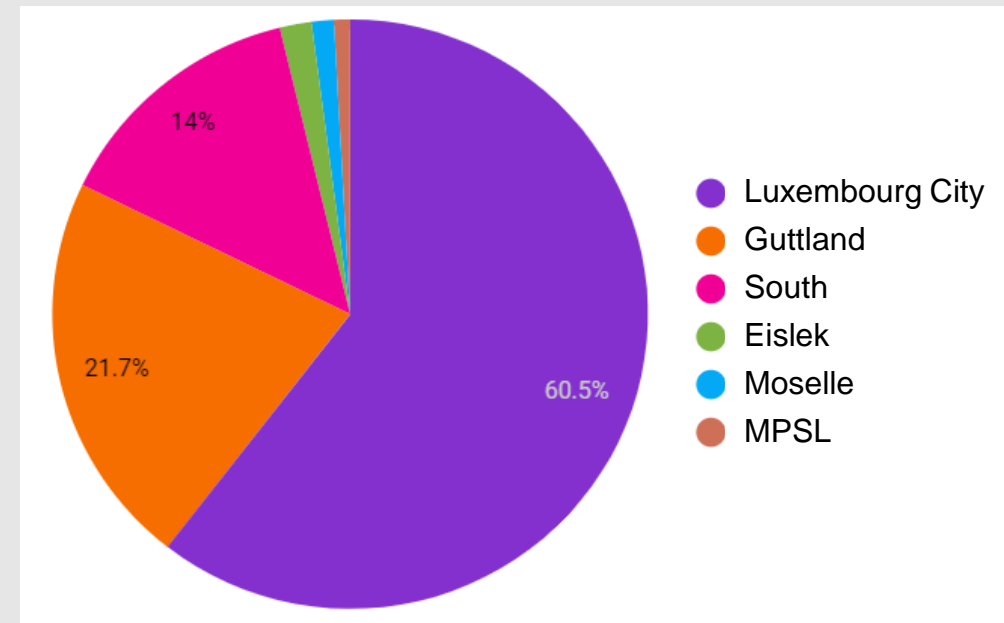
Regions, 2022



**Nights,
paid accommodation**



**Arrivals,
paid accommodation**



Luxembourg City	25.966	-22% (vs. 2019)
Guttland	9.389	+127% (vs. 2019)
South	5.413	+3% (vs. 2019)
Eislek	854	+15% (vs. 2019)
Moselle	681	-54% (vs. 2019)
MPSL	377	-51% (vs. 2019)

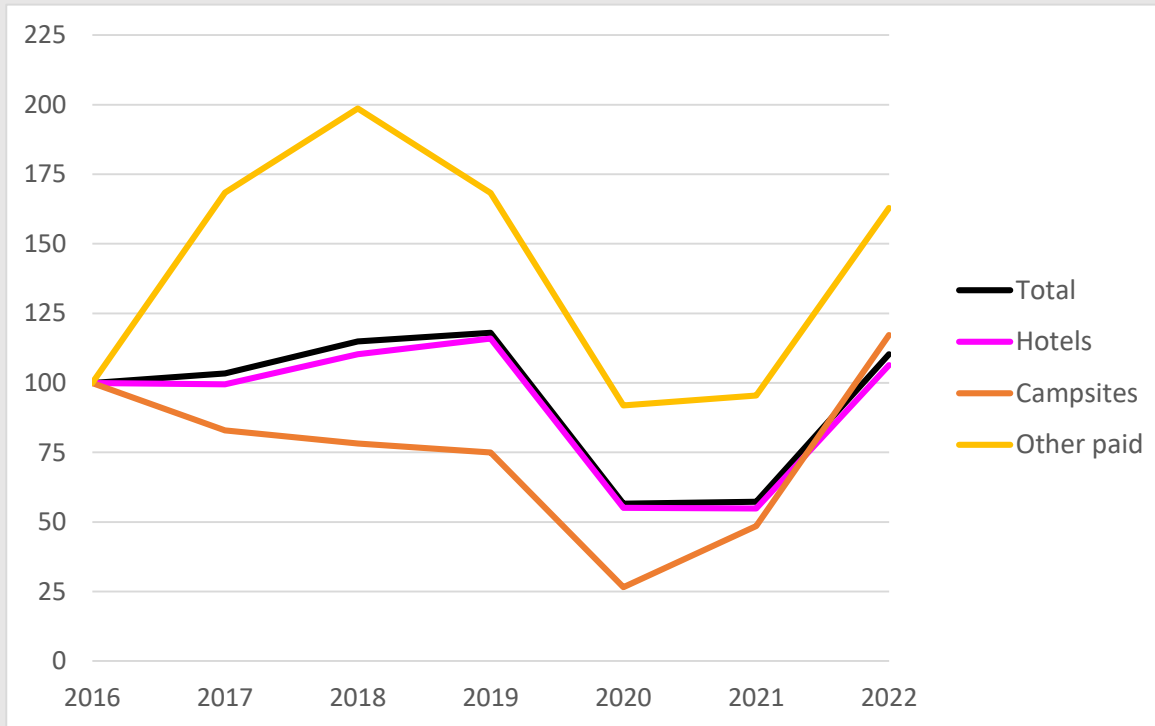
Luxembourg City	13.412	-25% (vs. 2019)
Guttland	4.811	+98% (vs. 2019)
South	3.099	+1% (vs. 2019)
Eislek	382	+66% (vs. 2019)
Moselle	267	-73% (vs. 2019)
MPSL	194	-6% (vs. 2019)

Nights in paid accommodation

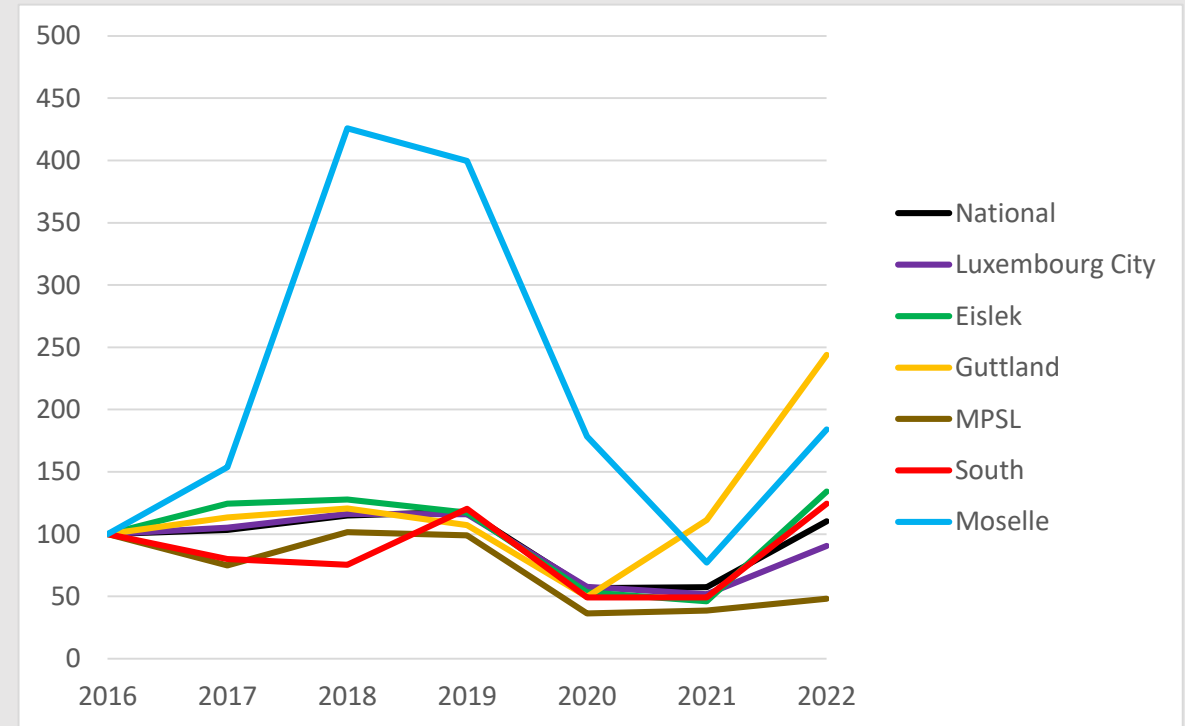
Total, Type of accommodation & Regions : Trends 2016-2022



2016 = Index 100



2016 = Index 100

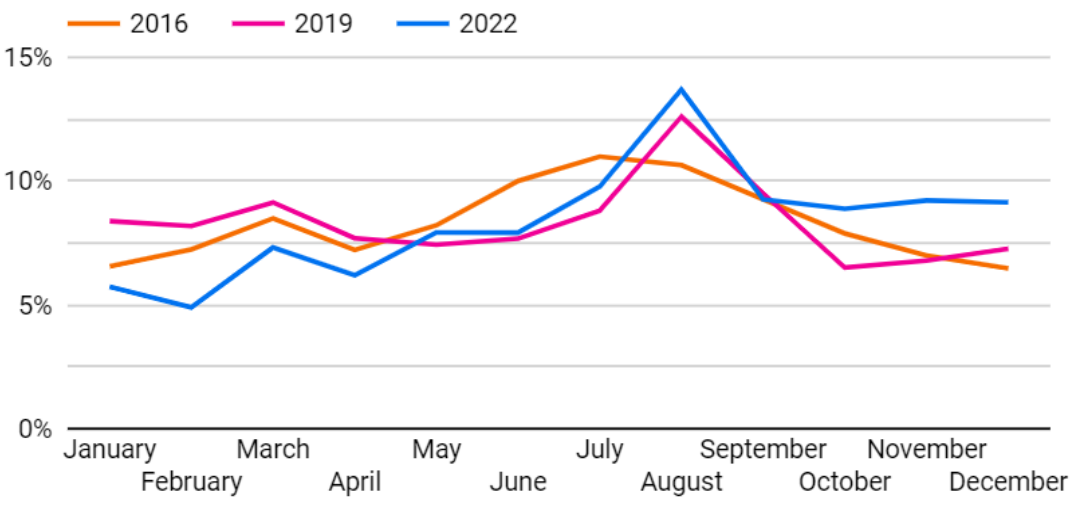


Nights in paid accommodation

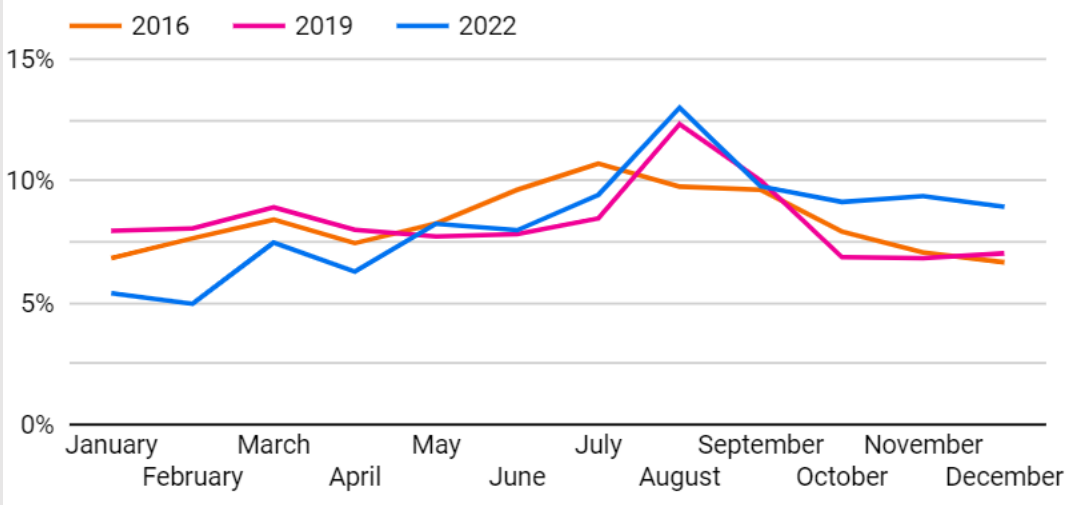
Seasonality



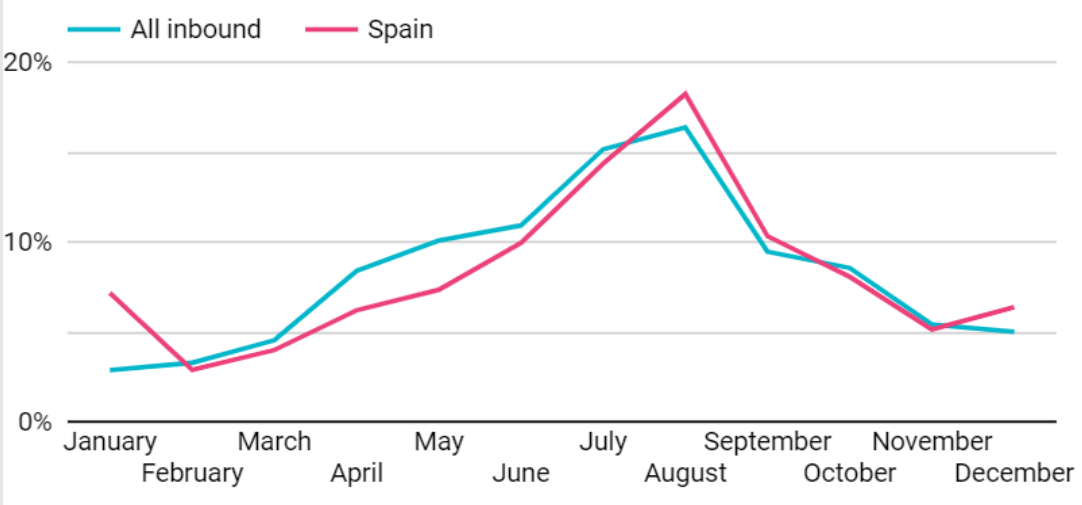
Spanish nights, all paid accommodation



Spanish nights, hotels



Nights, all paid accommodation, 2022



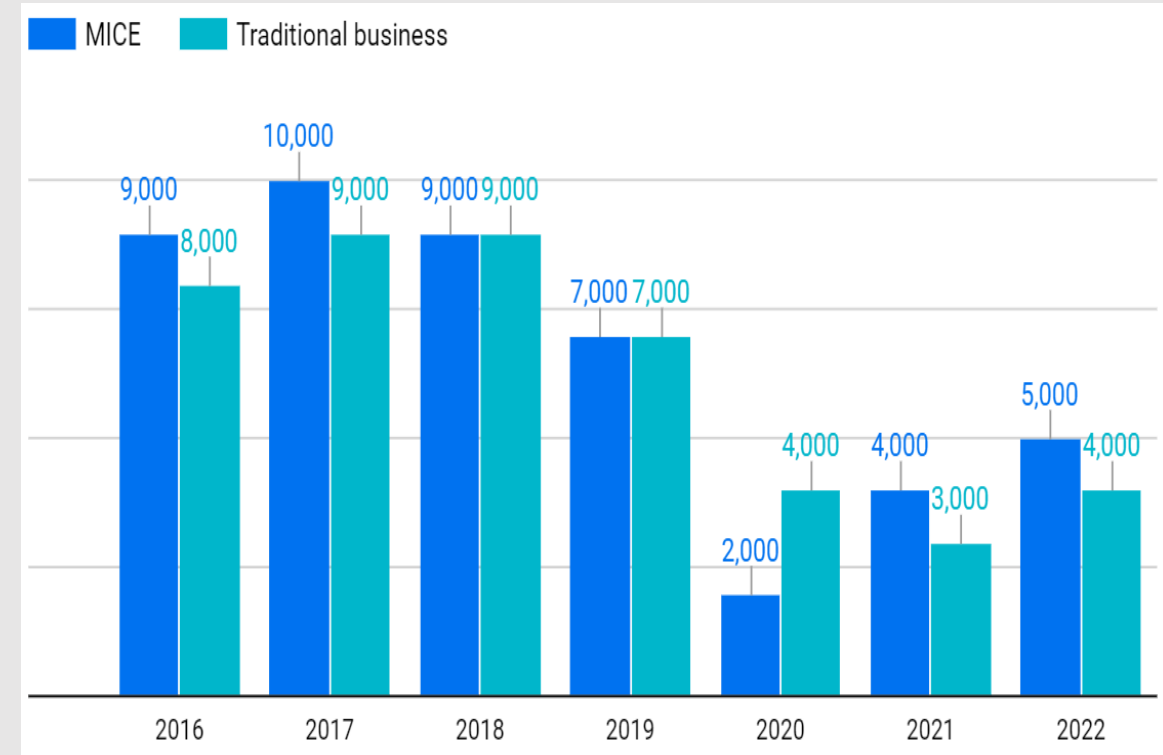
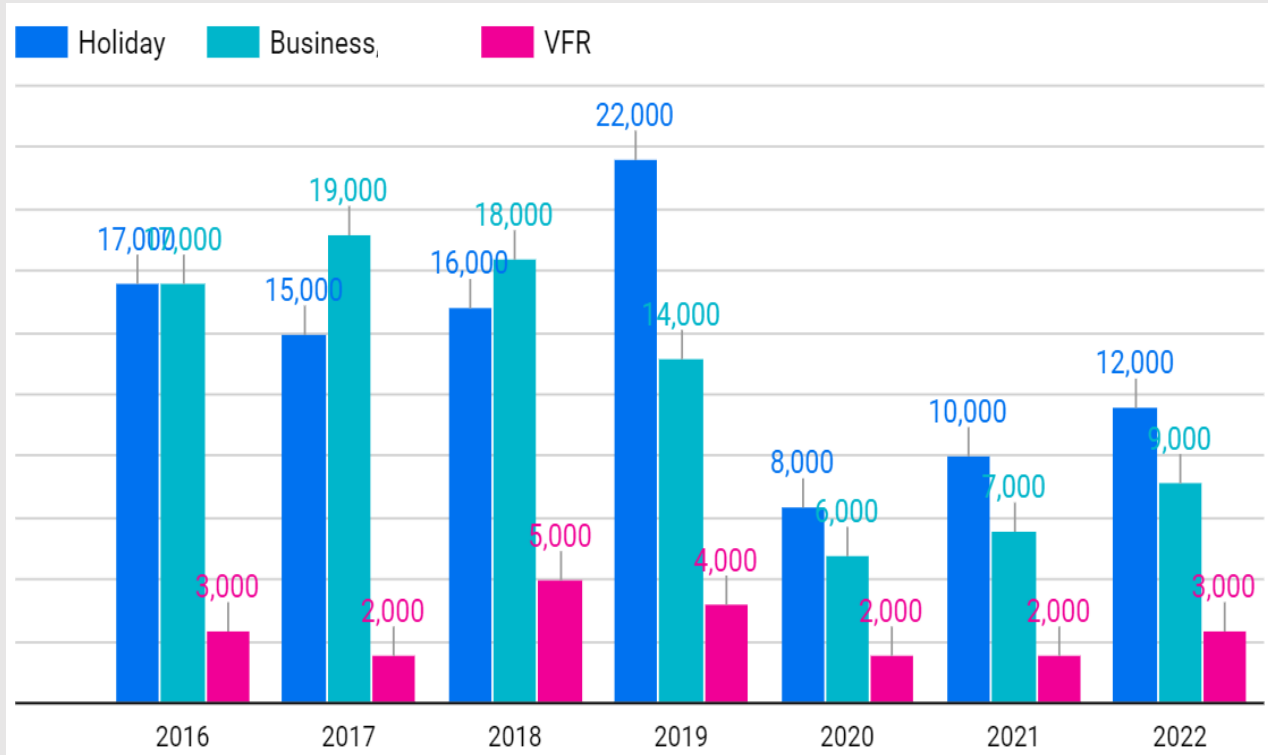


Characteristics of Spanish inbound trips to Luxembourg

Spanish trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

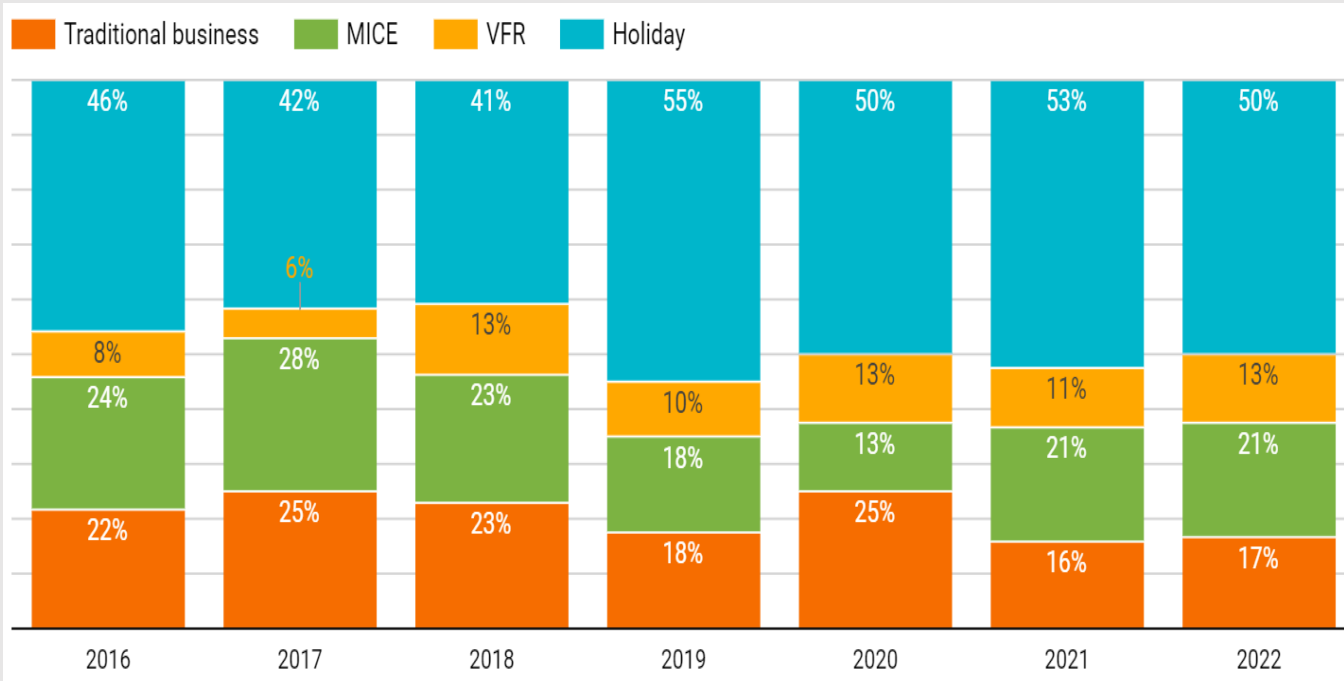


Spanish trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

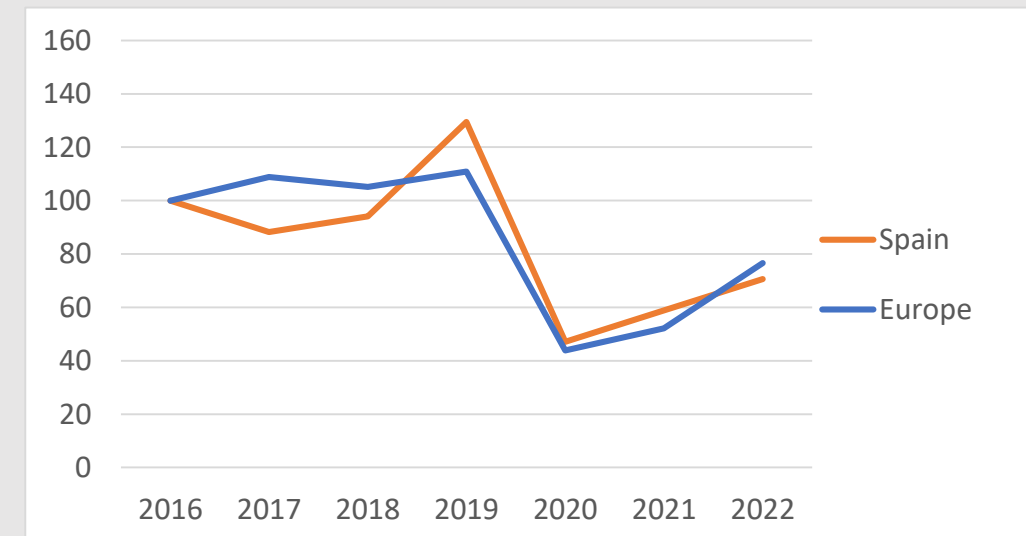
Spanish trips to Luxembourg, 2016-2022



2022

	Spain to Luxembourg	Europe to Luxembourg
Holiday	50%	63%
VFR	13%	17%
MICE	21%	12%
Traditional Business	17%	8%

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

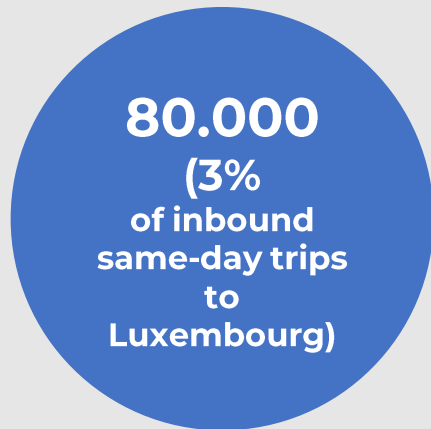


Spanish same-day trips to Luxembourg

2022

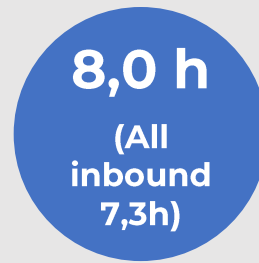


Number of Spanish same-day trips to Luxembourg

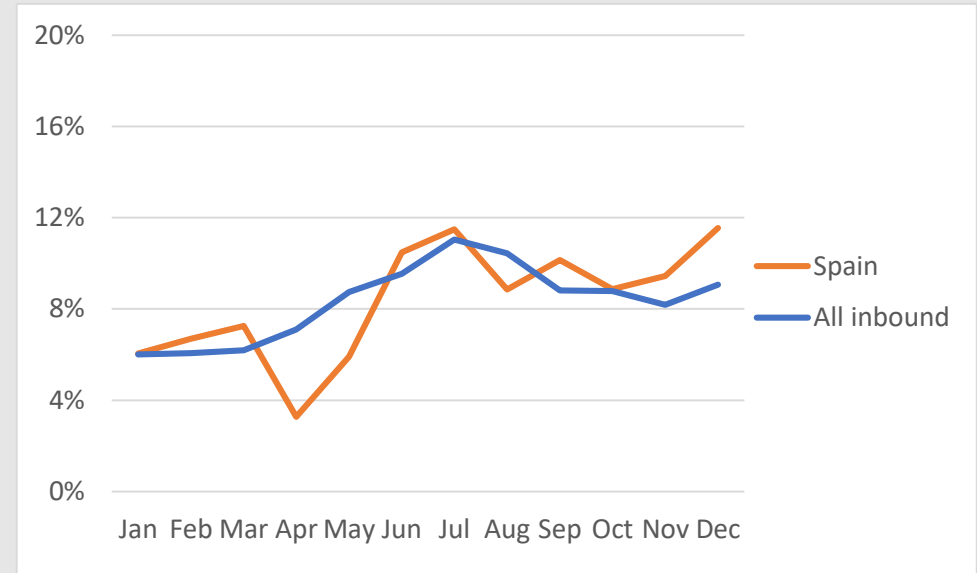


+46% (vs. 2021)

Average length of same-day trips



Seasonality of same-day trips, % monthly share





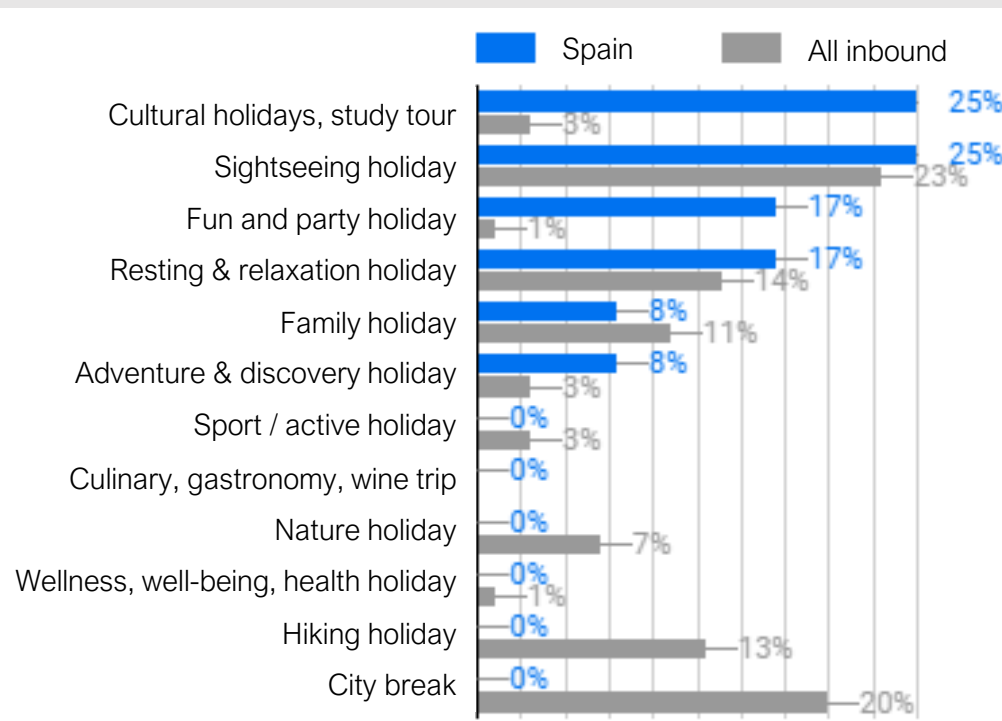
Travel behaviour of Spanish leisure visitors in Luxembourg

Holiday types

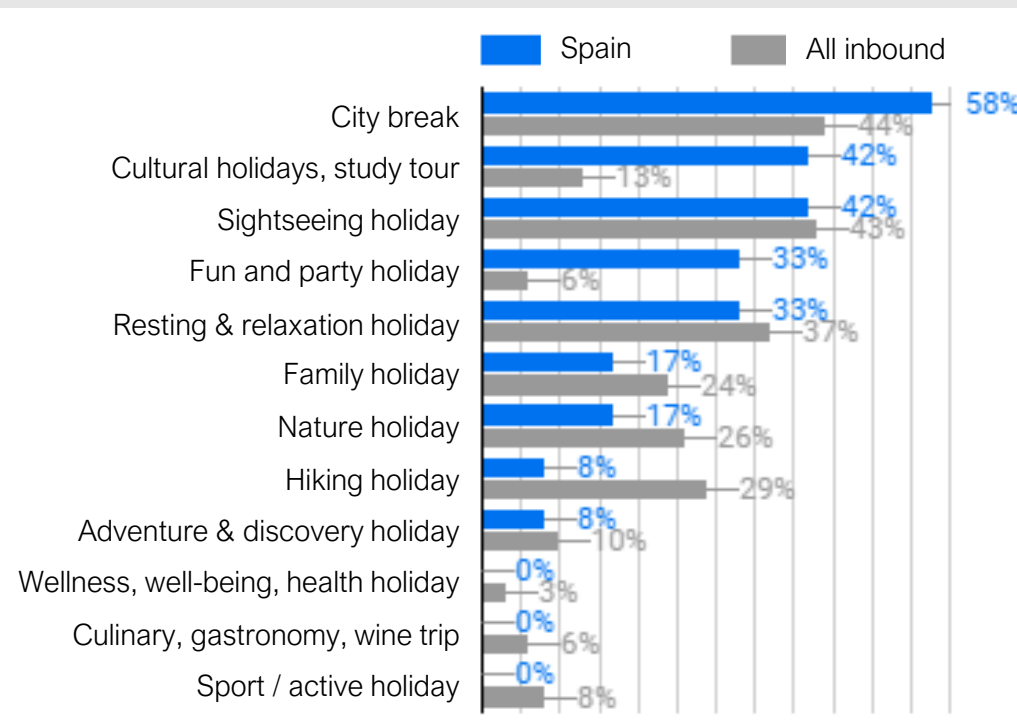
Inbound leisure visitors with overnight, 2020-2022



Main holiday types

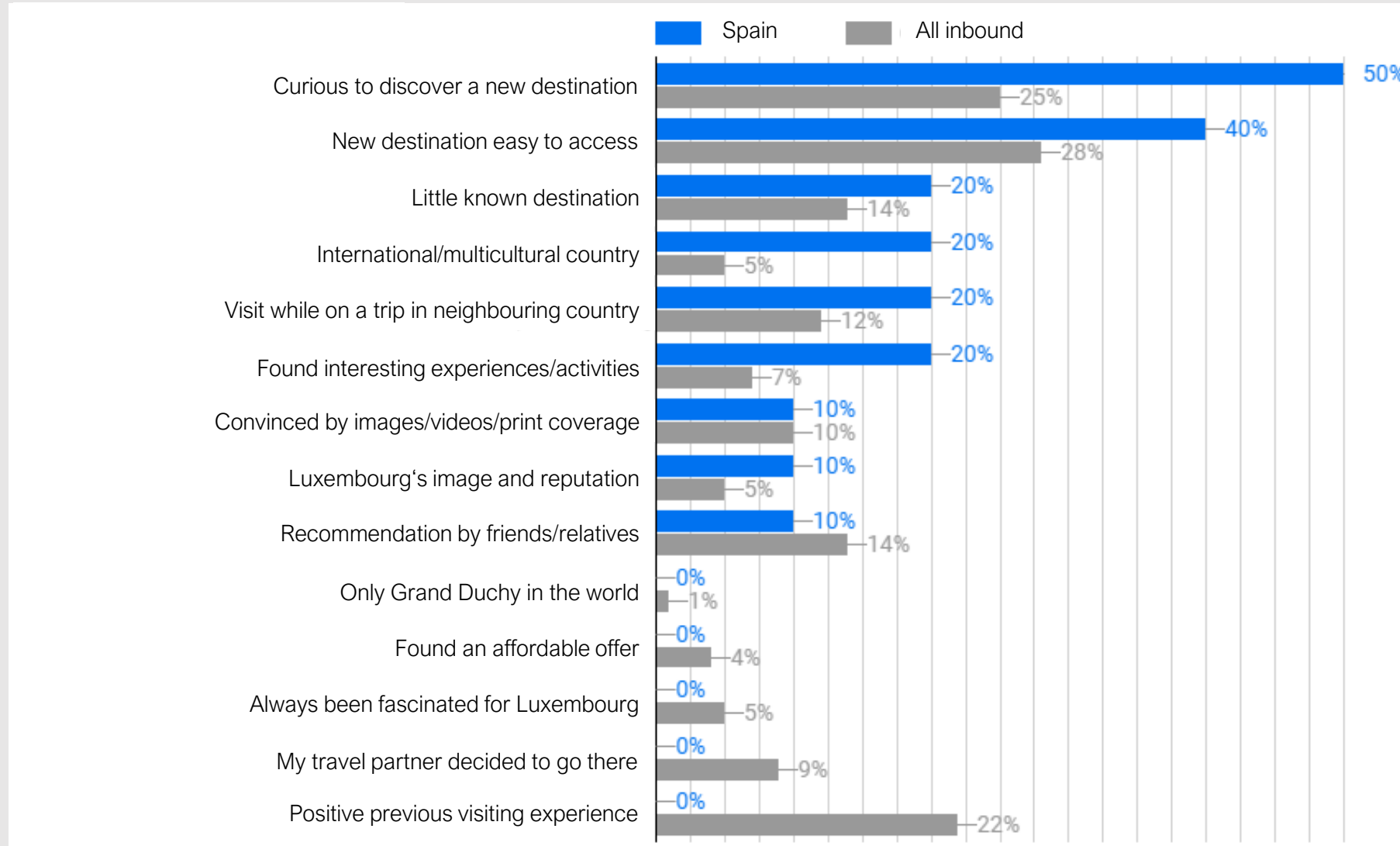


Additional holiday types



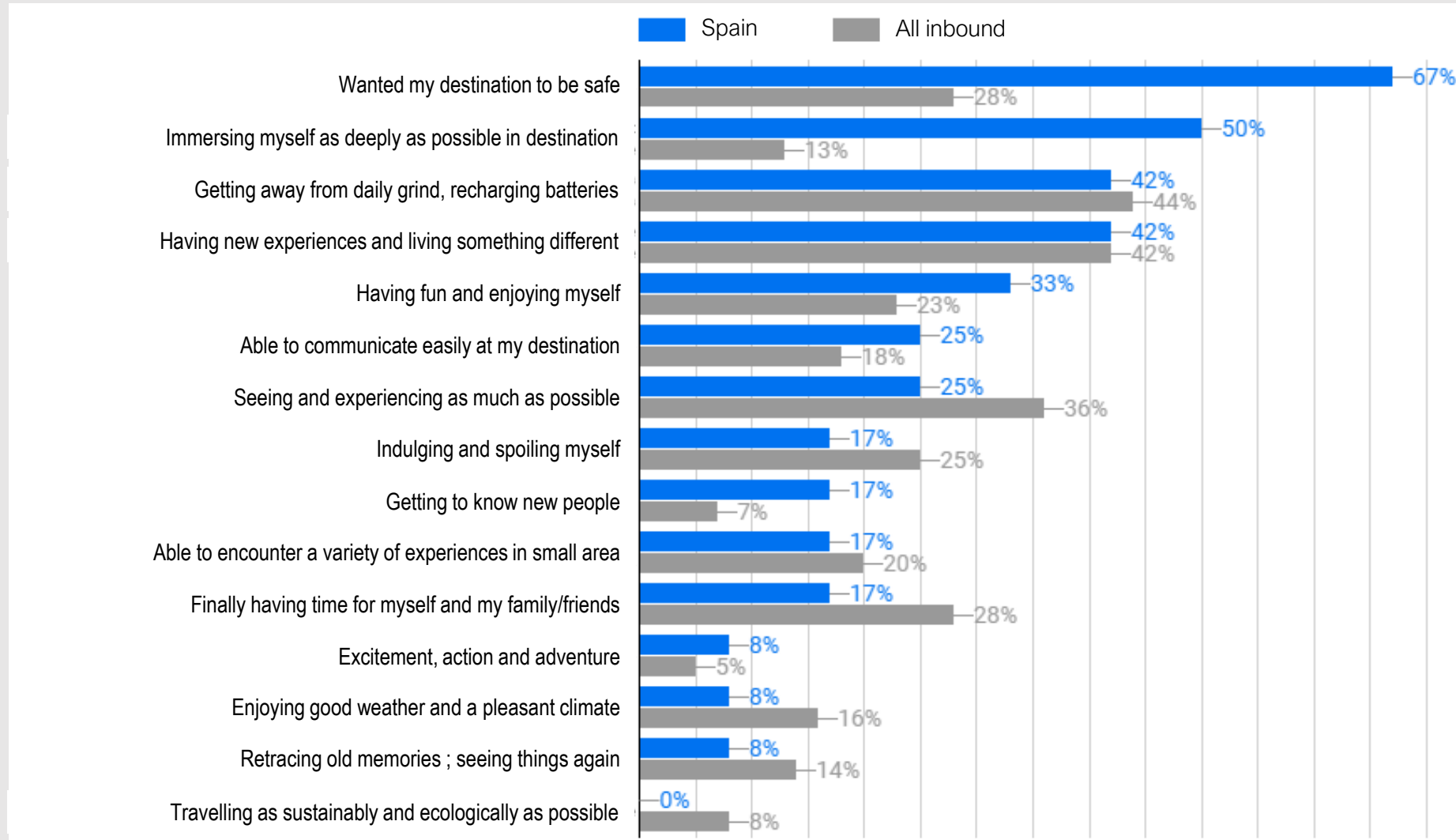
Key decision criteria for choosing Luxembourg

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



Key travel motivations

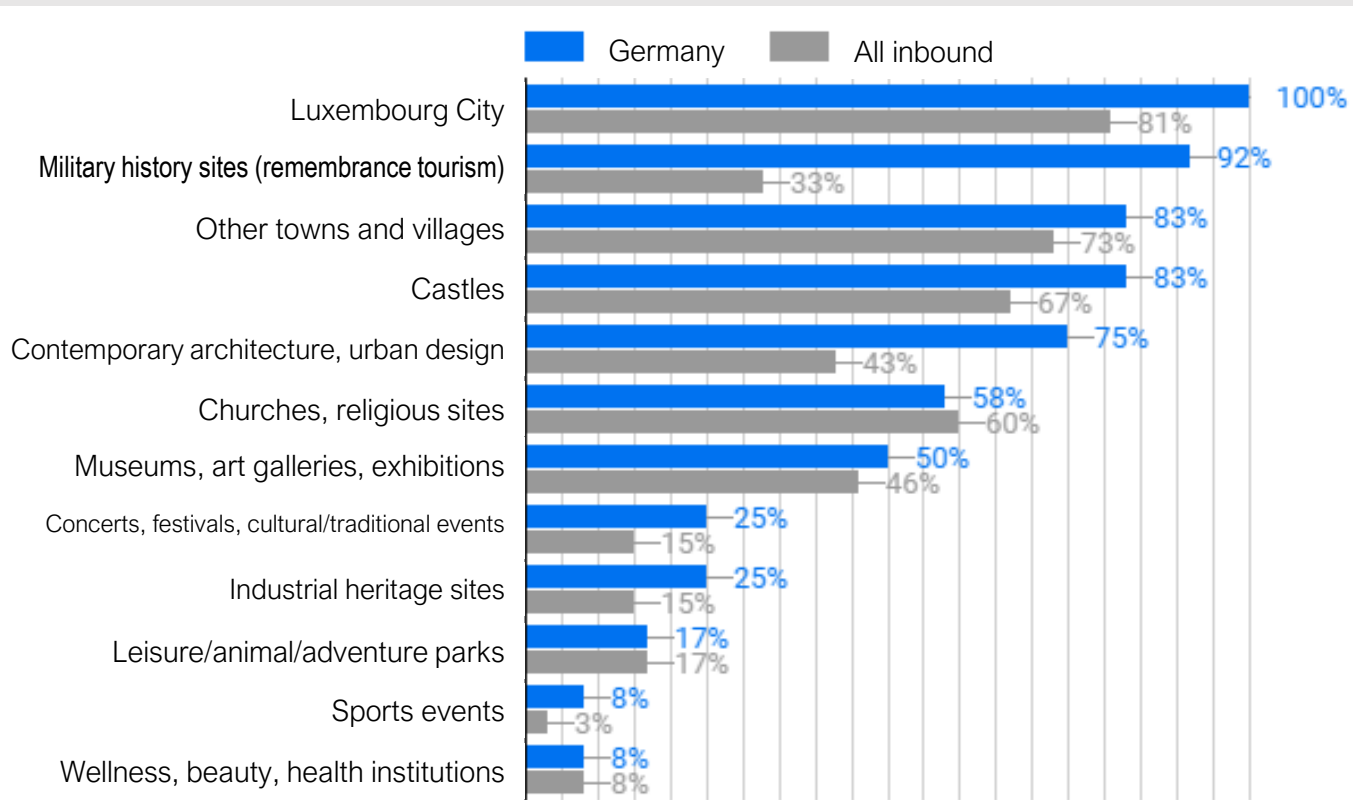
Inbound leisure visitors with overnight, 2020-2022



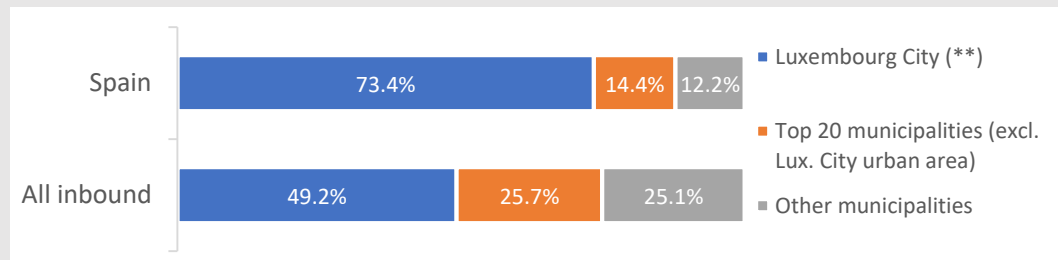
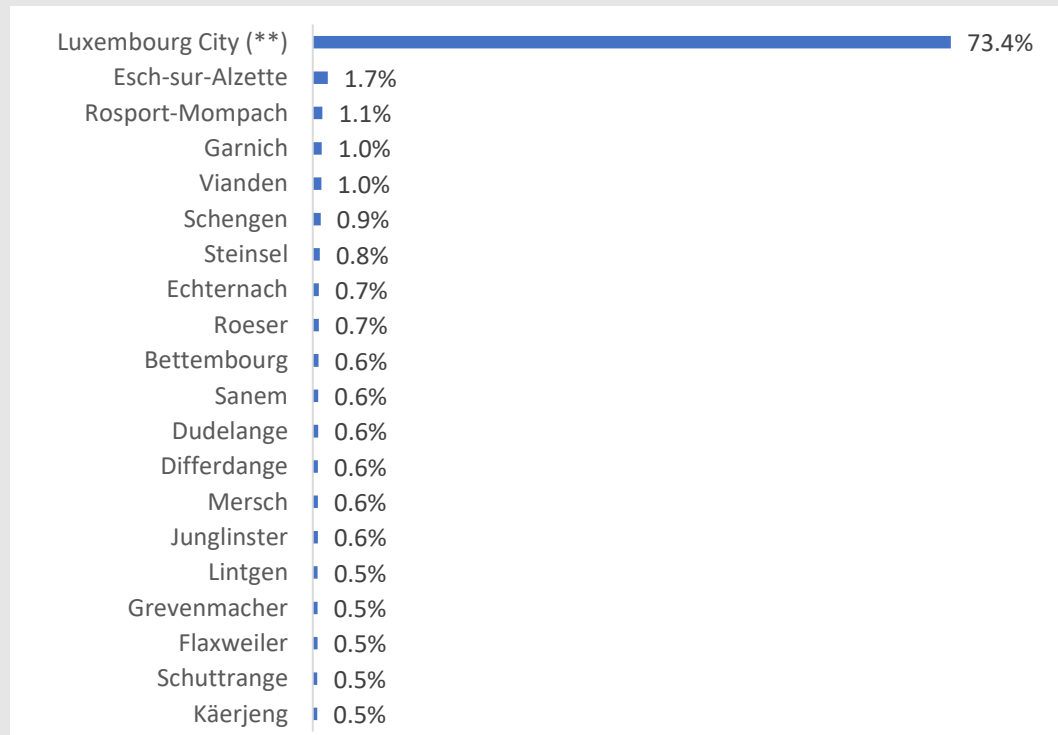
Type of places and cities visited in Luxembourg



Places visited during leisure overnight stays¹



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



Sources: ¹LFT/Ilres Visitor Survey, 2020-2022, ²Mobile phone data (Editus/LFT).

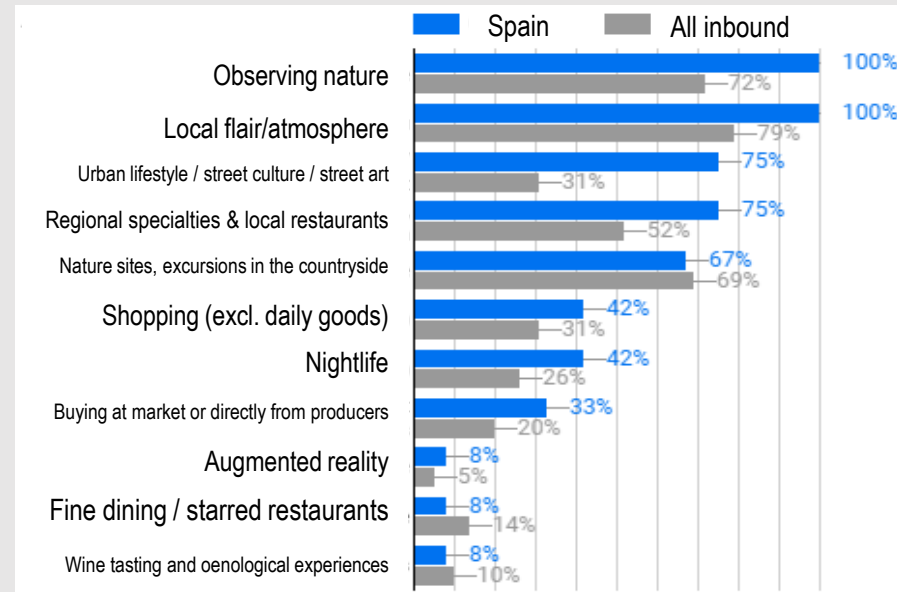
(*) In the case of overnight trips : includes city where night is spent. Includes all cities with at least 1 hour of visit.
 (**) Urban area, incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange).

Activities undertaken in Luxembourg

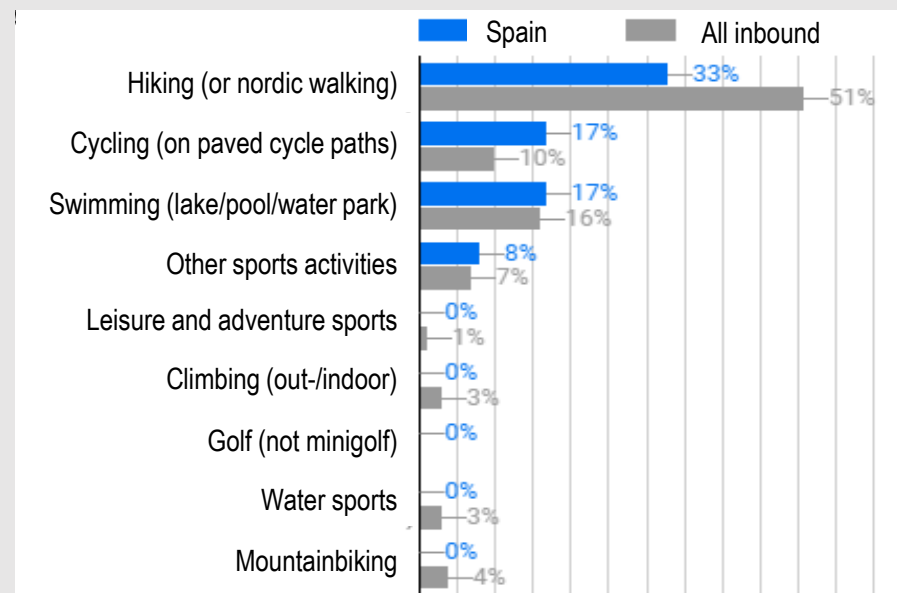
Inbound leisure visitors with overnight, 2020-2022



Non-sporting activities



Sporting activities

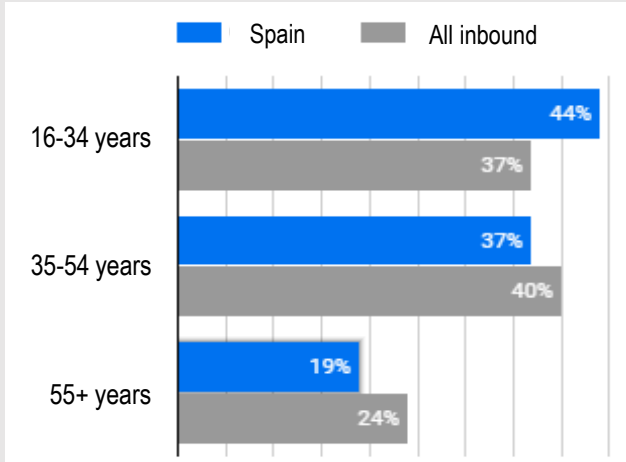


Transport, travel party, age, repeat visits and cross-border trips

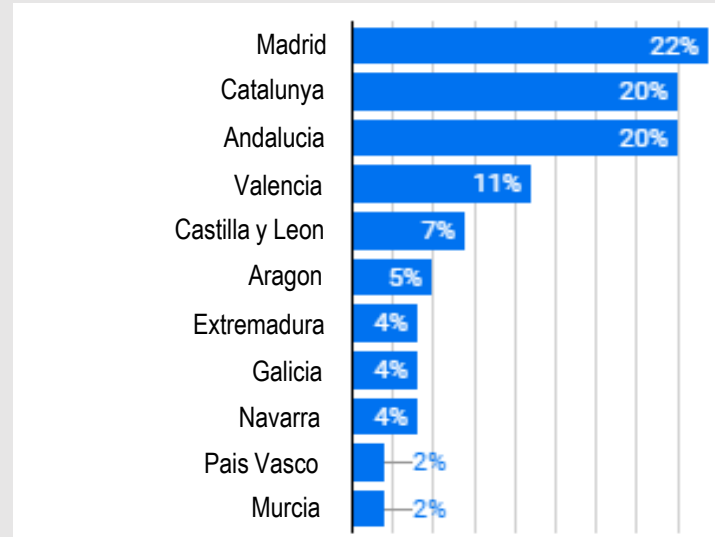
Inbound leisure visitors with overnight, 2020-2022



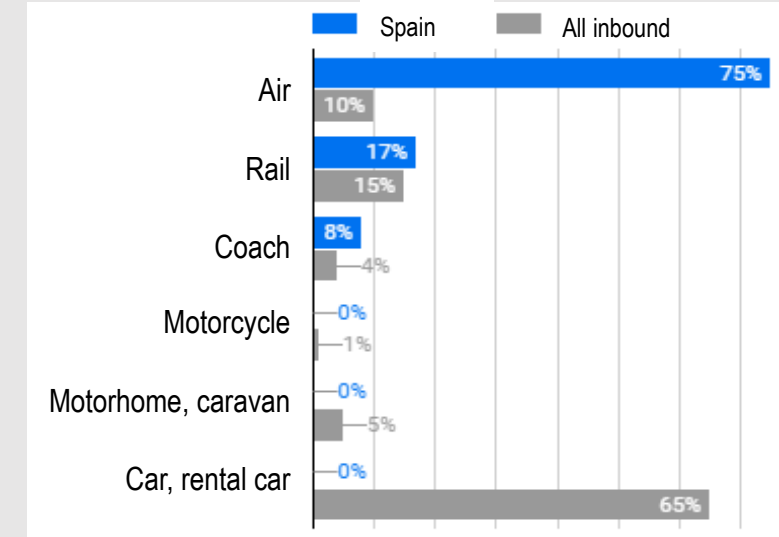
Age groups



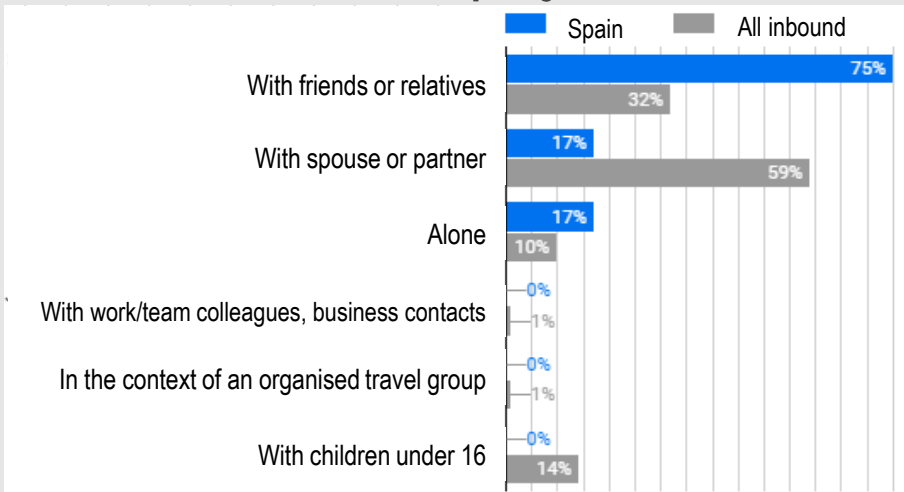
Region of origin



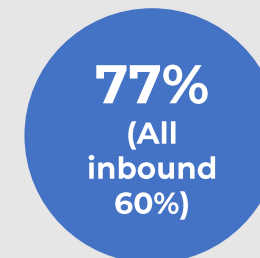
Mode of transport to access Luxembourg



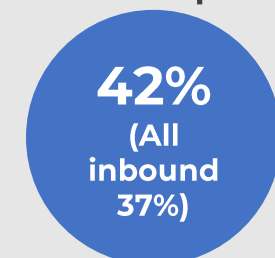
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

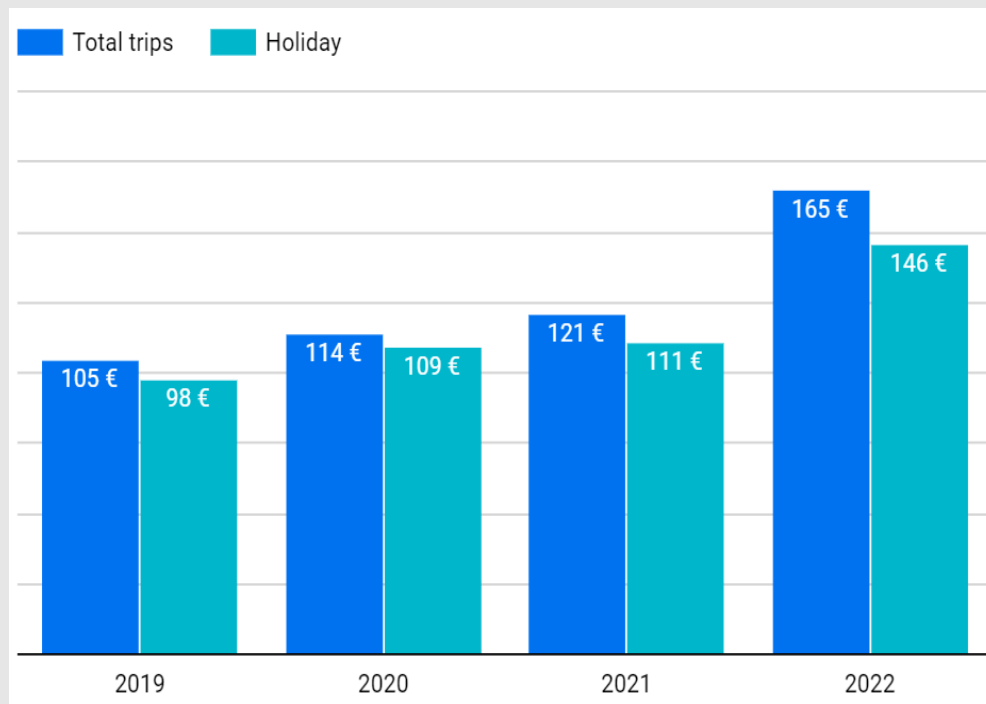


Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

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



2022

Spain to
Luxembourg

Europe to
Luxembourg

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

165 €

124 €

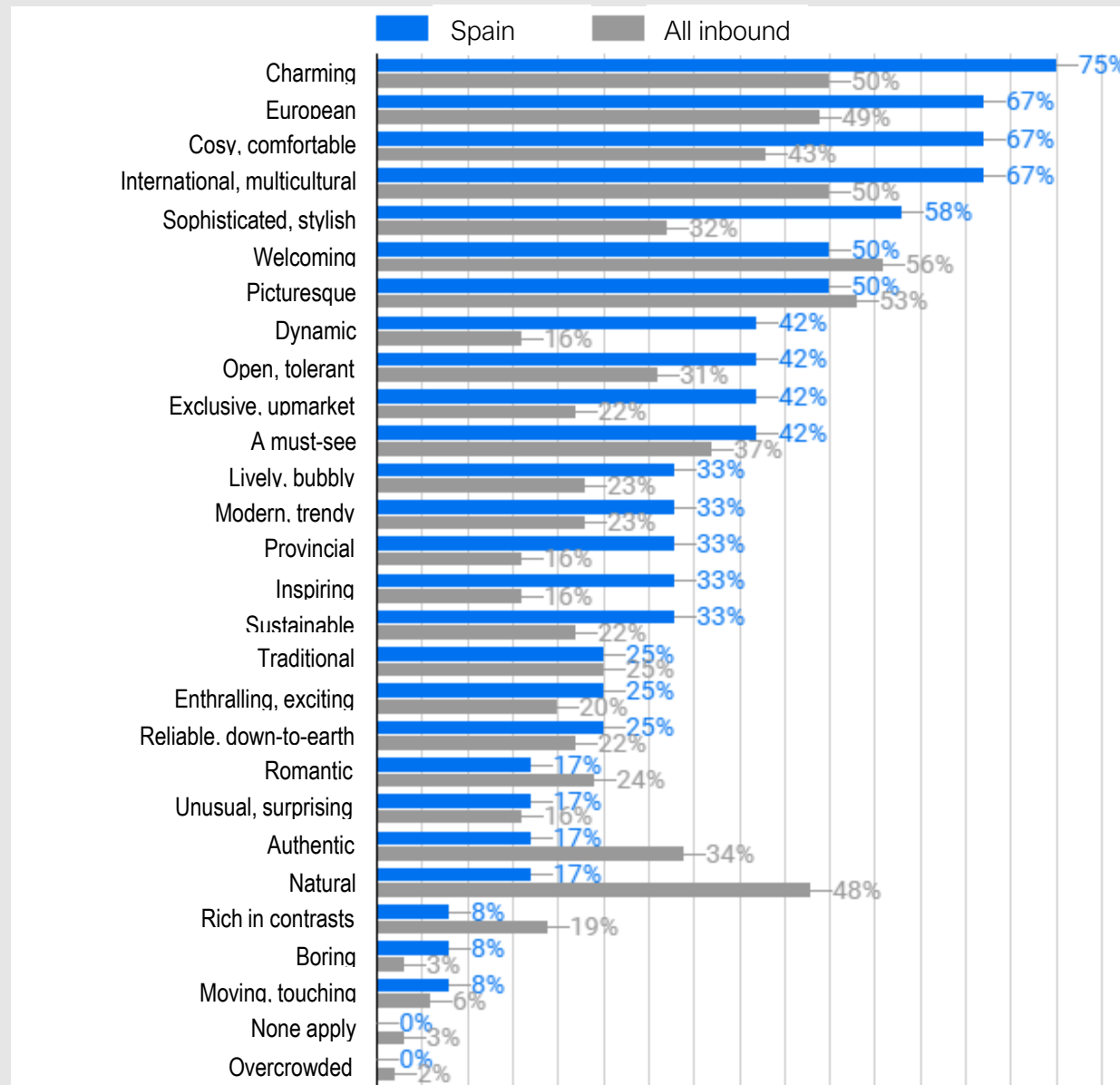
Spend/day/pers. on **holiday** trips

146 €

118 €

Image perception of Luxembourg

Leisure overnight visitors

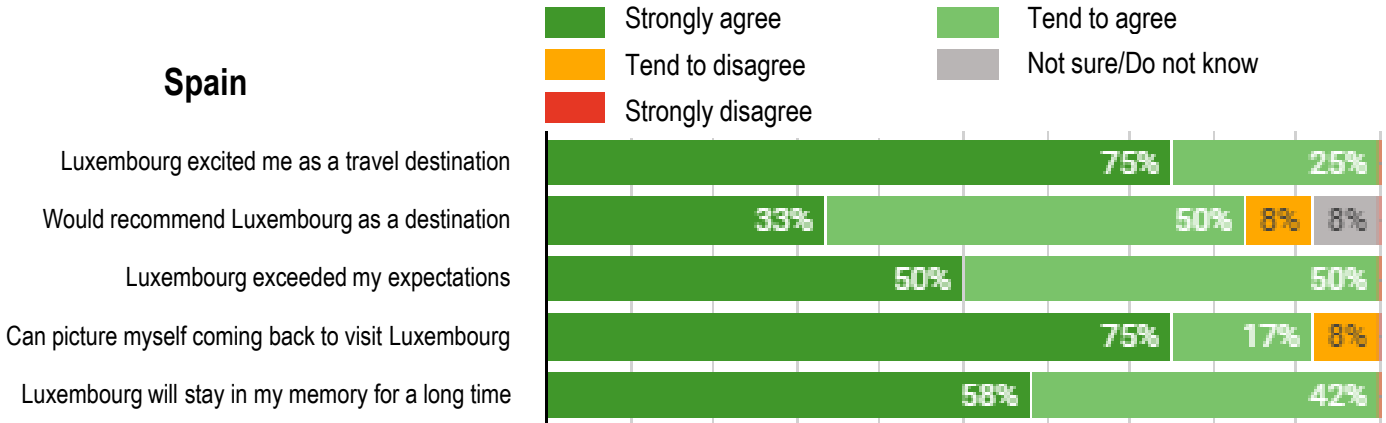


Visitor satisfaction and recommendation

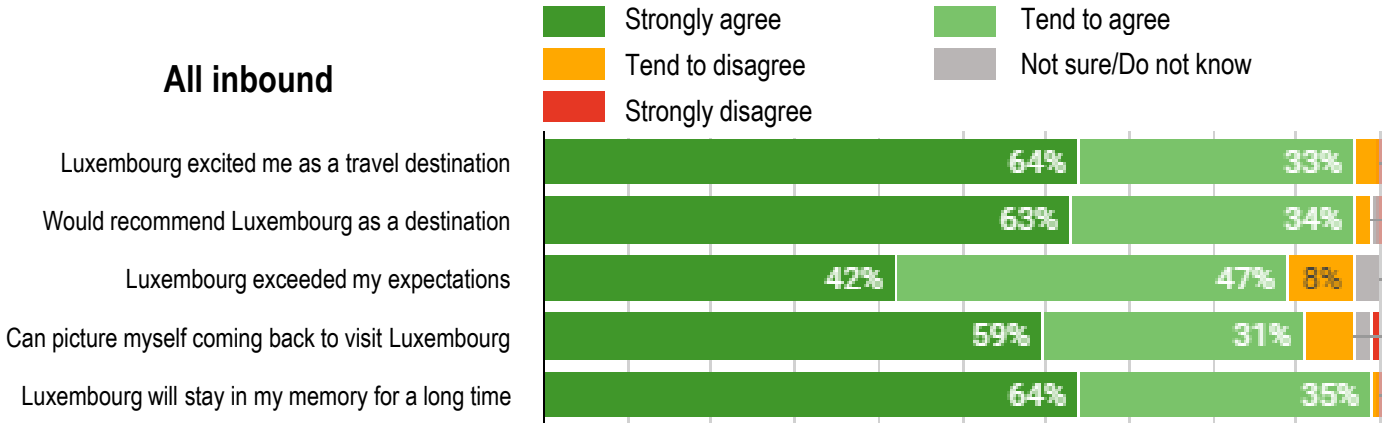
Inbound leisure visitors, 2020-2022



Spain



All inbound

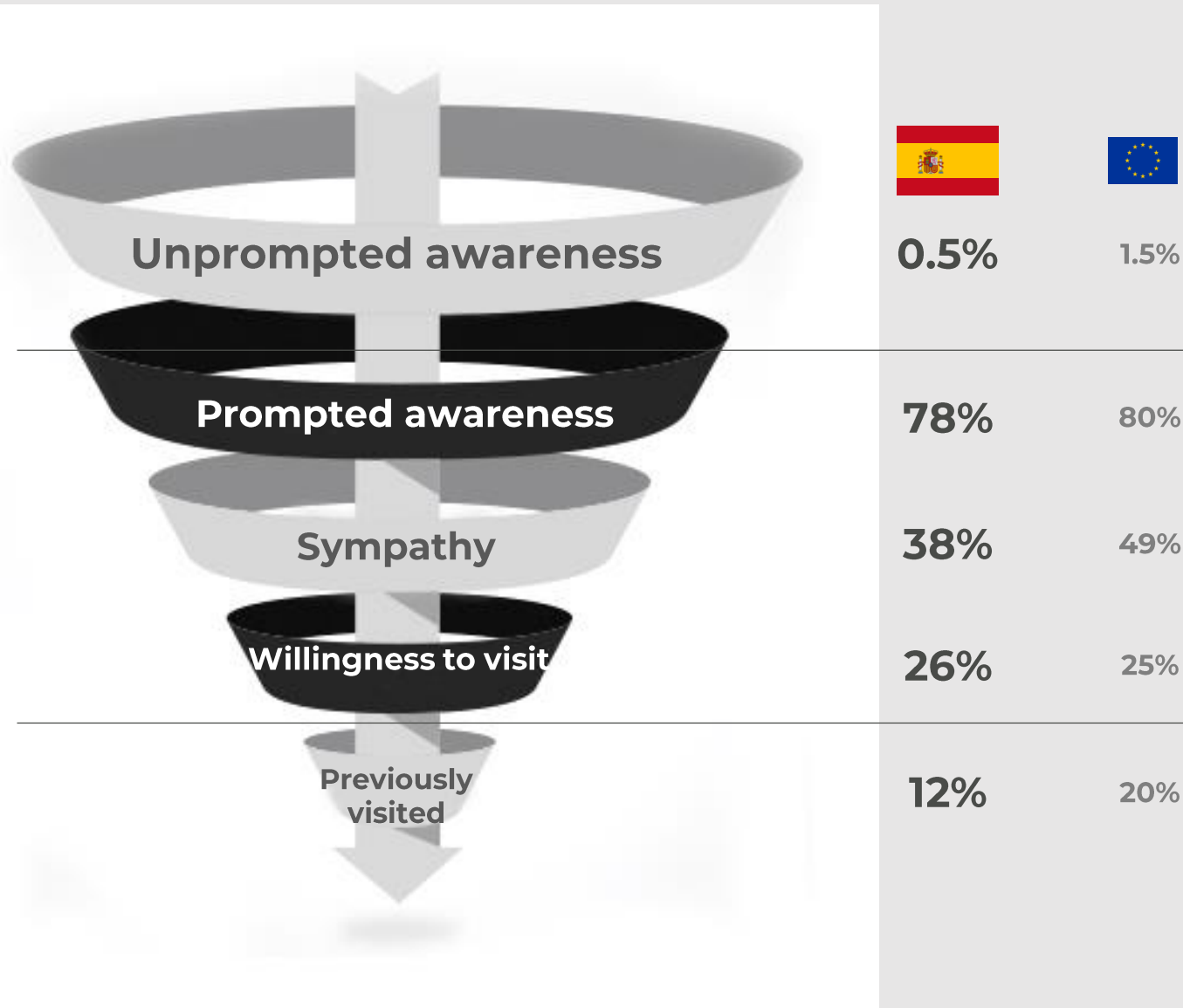




Target segments, Brand & Growth Potential

Brand Funnel 2021-2022

Assessing Luxembourg's brand strength as a destination



Total future visitor potential from Spain (*)

9.2 million

Highest future travel intent from Spain (**)

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

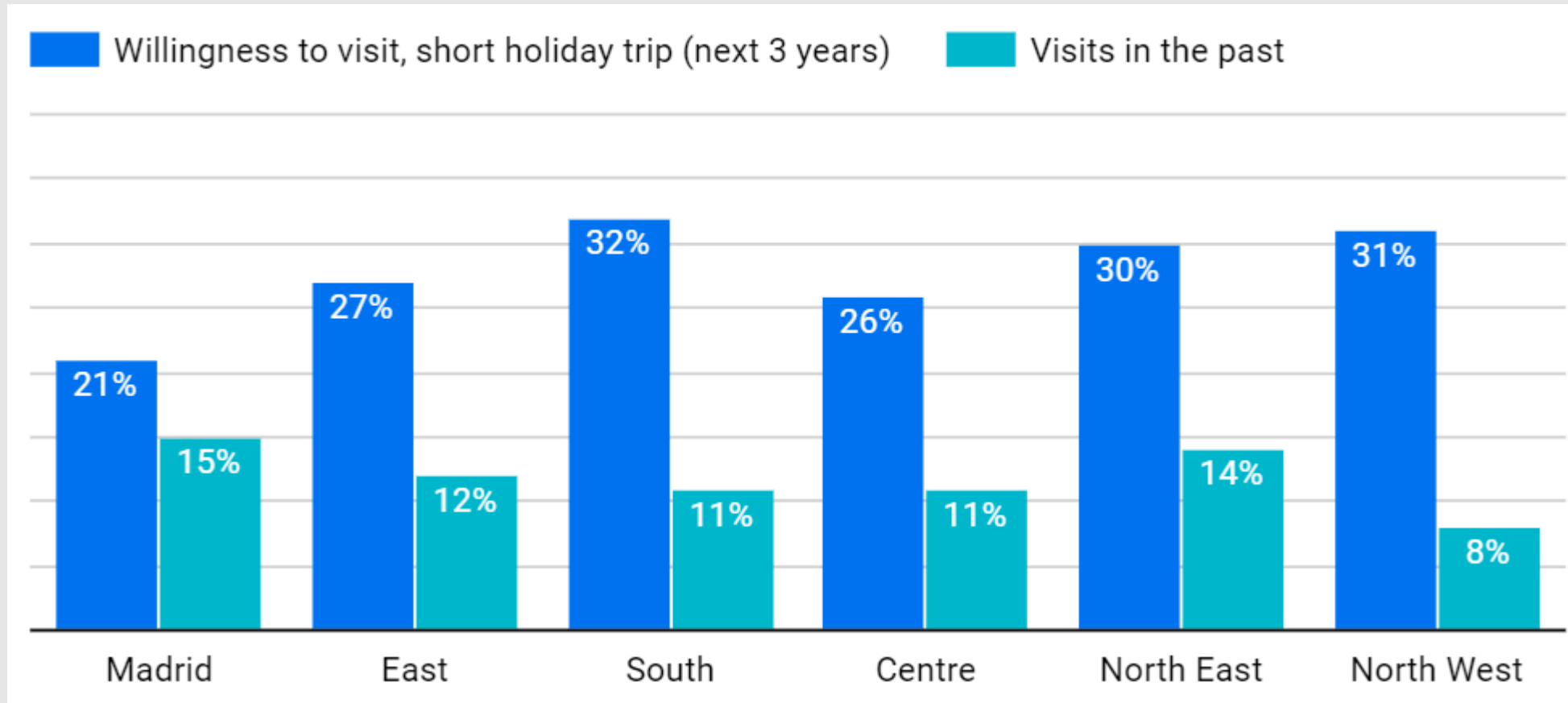
Source: Destination Brand/Inspektour.

(*) 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



General theme interest (*)






Theme			
	Rank	Rank	% interested
City	4	1	79%
Culinary	2	2	74%
Castles	5	3	73%
Nature	3	4	71%
History/Unesco	7	5	69%
Culture	6	6	68%
Resting/Relaxation	1	7	68%
Nightlife (**)	12	8	54%
Sustainability	9	9	53%
Wellness	13	10	52%
Industrial heritage	17	11	49%
Family	11	12	48%
Countryside	15	13	46%
Shopping	10	14	44%
Events	14	15	44%
Hiking	8	16	41%
Active-sports	16	17	36%
Cycling	18	18	29%
MTB	19	19	25%
Motorcycling	20	20	22%

(*) 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
Castles	3	1	52%
City	1	2	52%
Culture	4	3	51%
Resting/Relaxation	2	4	46%
Nature	7	5	43%
History/Unesco	8	6	40%
Culinary	6	7	39%
Cycling	12	8	38%
Wellness	9	9	38%
Shopping	5	10	37%
Nightlife (***)	11	11	34%
Hiking	10	12	32%
Family	13	13	31%
MTB	15	14	28%
Active-sports	14	15	25%

Growth potential for themes (**)

- City
- Culinary & Wine
- History/Unesco
- Nightlife (***)

(*) 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	36%
Attractive, appealing	4	2	35%
Authentic	1	3	33%
Surprising	5	4	32%
Lot of variety, diversified	6	5	31%
Not crowded, insider tip	8	6	30%
Service-oriented	7	7	30%
Sustainable	10	8	29%
Welcoming, hospitable	2	9	29%
Lively, hip	9	10	28%

(*) 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, PS , NLA.

Theme & segment focus

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

Brand Value focus

Theme	Priority	Segments
Welcoming	1	EXP
Lively/hip	2	



Your contact



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