



Luxembourg for Tourism

Market profile

SPAIN

2023



Economic indicators & General Travel Demand

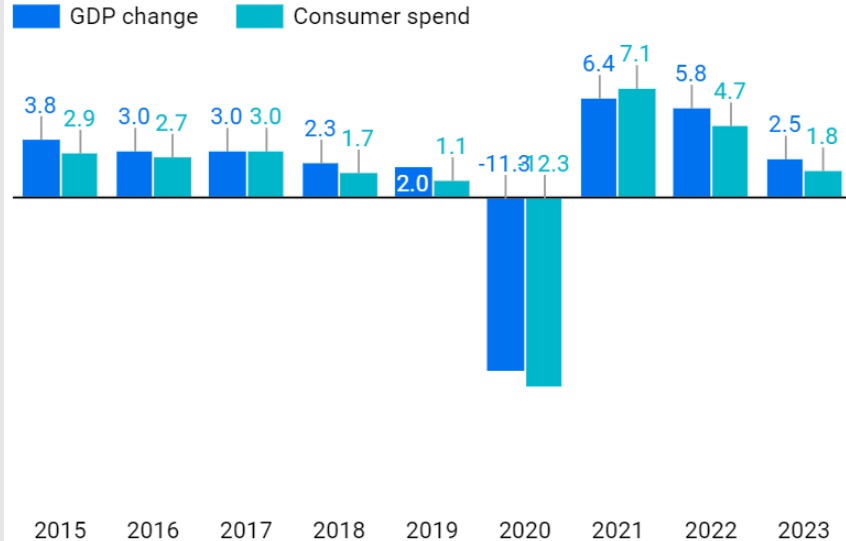
Economic indicators - General travel demand



Economy & population

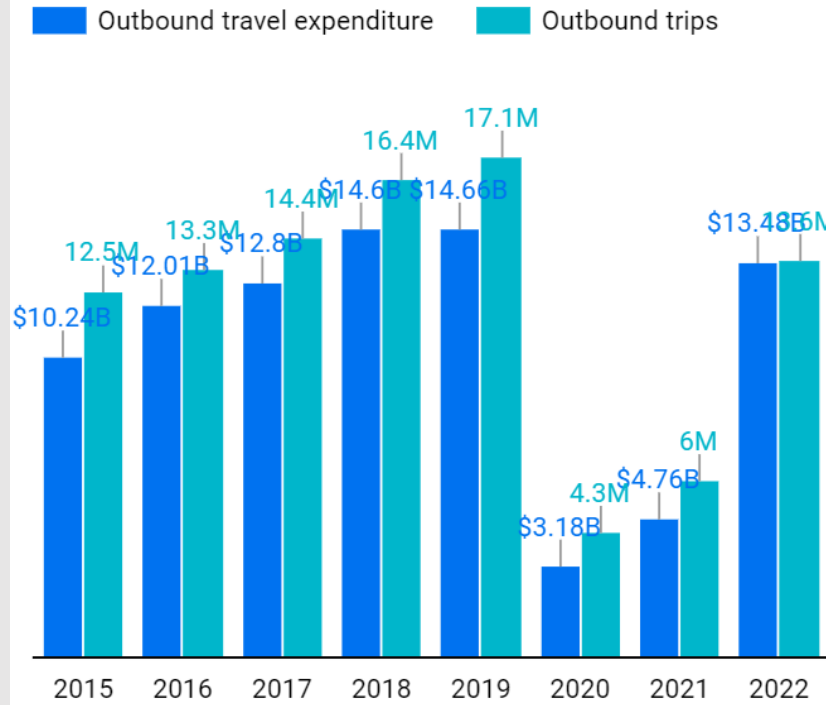
GDP (\$) per capita Unemployment (%) Population (mn) Inflation (%)
33,071 **12.1** **47.8** **3.4**

GDP and Consumer spending, % annual change



Share of short trips (1-3 nights),
 % all outbound trips (2022)
31.9%

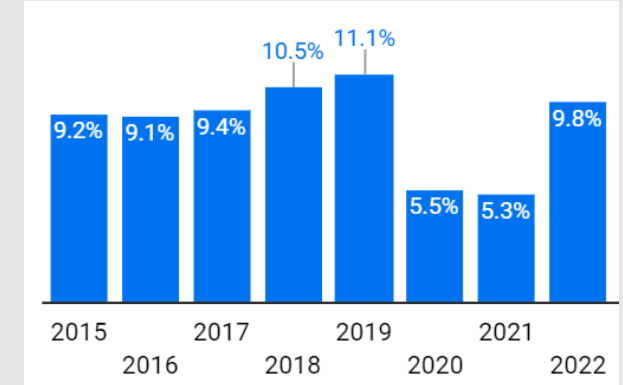
Outbound trips and travel expenditure



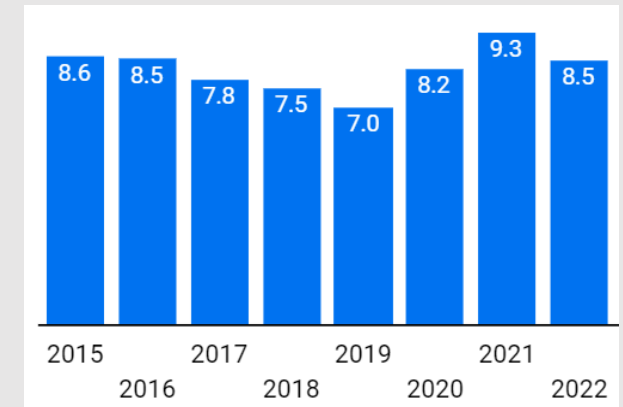
Average spend
 per outbound trip (2019)
856 \$

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 (2022)
90.9%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2023



**Nights,
paid accommodation, 2023**



+15% (vs. 2022)
+17% (vs. 2019)

**Arrivals,
paid accommodation, 2023**



+13% (vs. 2022)
+13% (vs. 2019)

**Average length of stay,
paid accommodation, 2023**



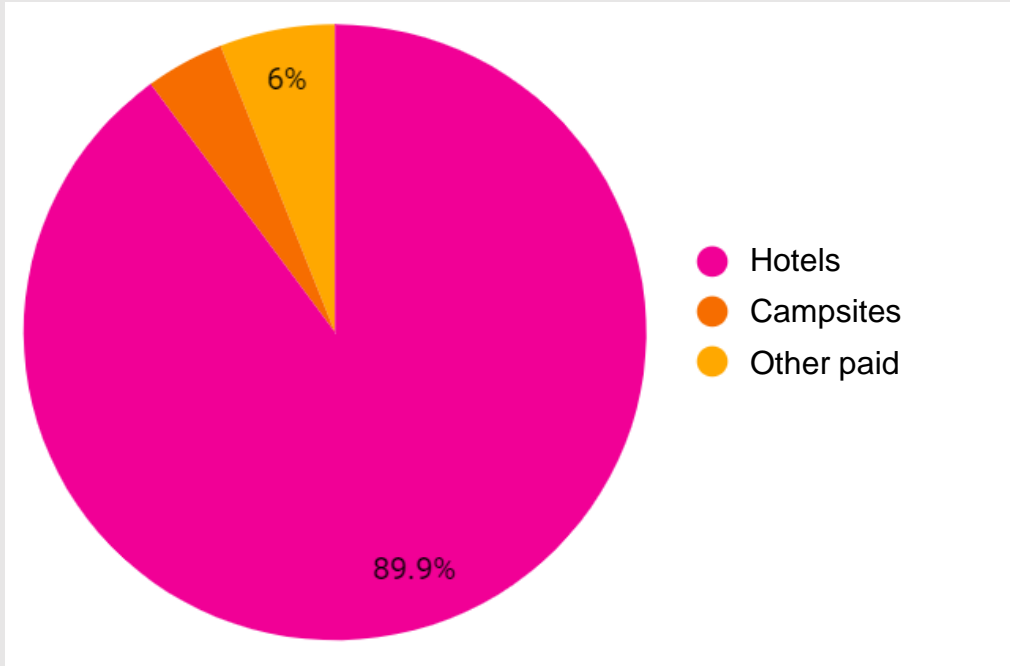
+0.03 days (vs. 2022)
+0.07 days (vs. 2019)

Nights & arrivals in paid accommodation

Type of accommodation, 2023

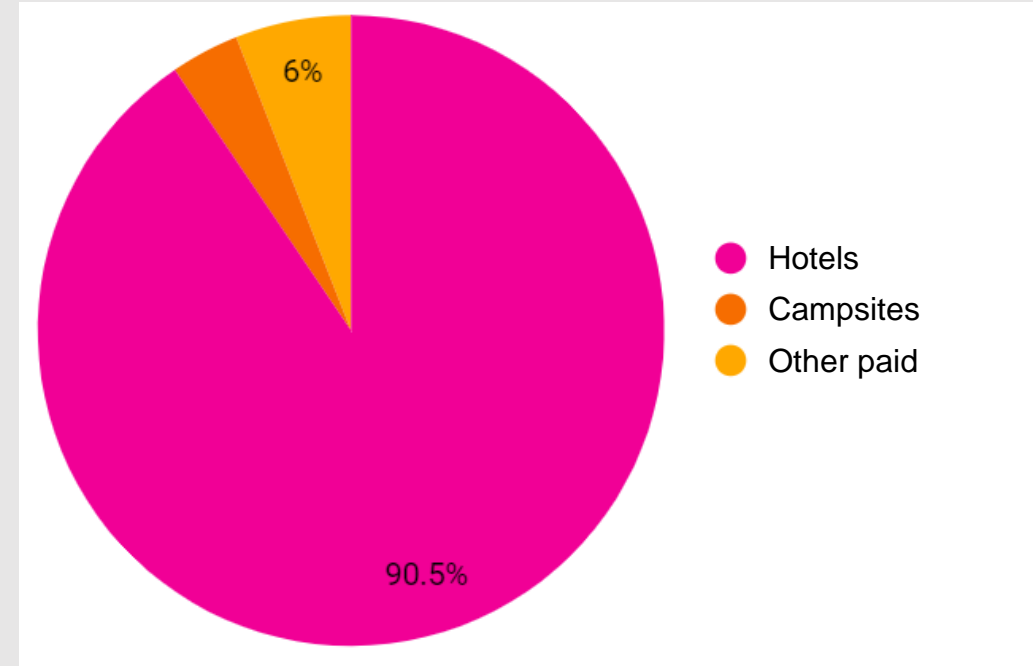


Nights, paid accommodation, 2023



Hotels	46.662	+18% (vs. 2022) +30% (vs. 2019)
Other paid accomm.	3.109	-22% (vs. 2022) -44% (vs. 2019)
Campsites	2.123	+35% (vs. 2022) -21% (vs. 2019)

Arrivals, paid accommodation, 2023



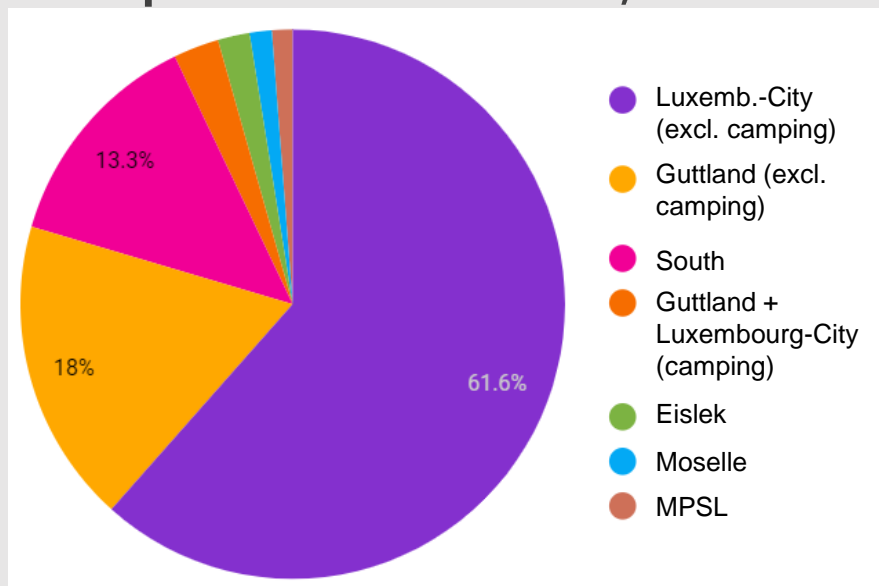
Hotels	23.445	+16% (vs. 2022) +21% (vs. 2019)
Other paid accomm.	1.548	-24% (vs. 2022) -42% (vs. 2019)
Campsites	915	+23% (vs. 2022) -8% (vs. 2019)

Nights & arrivals in paid accommodation

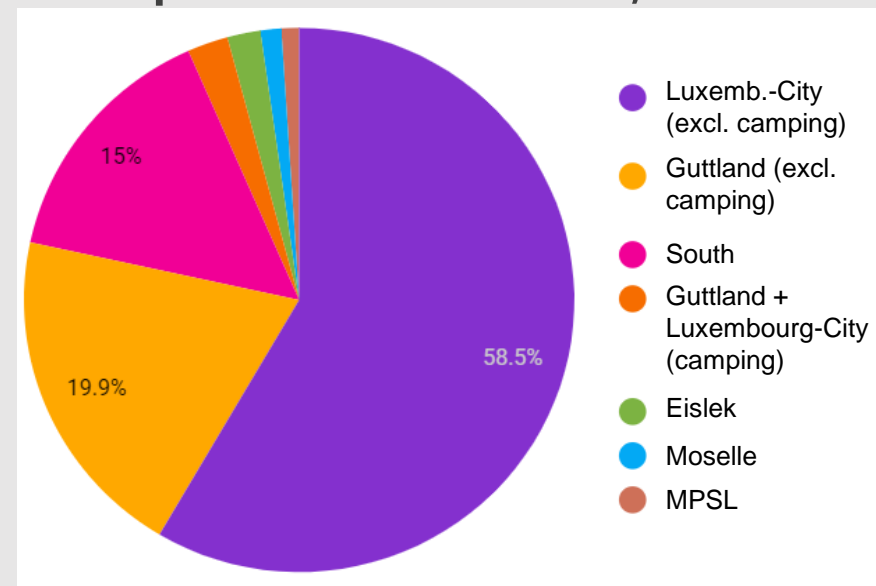
Regions, 2023



Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



Lux.-City (excl. camping)	31.961	+15% (vs. 2022) +16% (vs. 2019)
Guttland (excl. camping)	9.323	+4% (vs. 2022) +62% (vs. 2019)
South	6.910	+26% (vs. 2022)+7% (vs. 2019)
Guttland/Lux.-City (camping)	1.401	+80% (vs. 2022) +29% (vs. 2019)
Eislek	980	-4% (vs. 2022) -34% (vs. 2019)
Moselle	683	+0% (vs. 2022) -34% (vs. 2019)
MPSL	636	+59% (vs. 2022)-26% (vs. 2019)

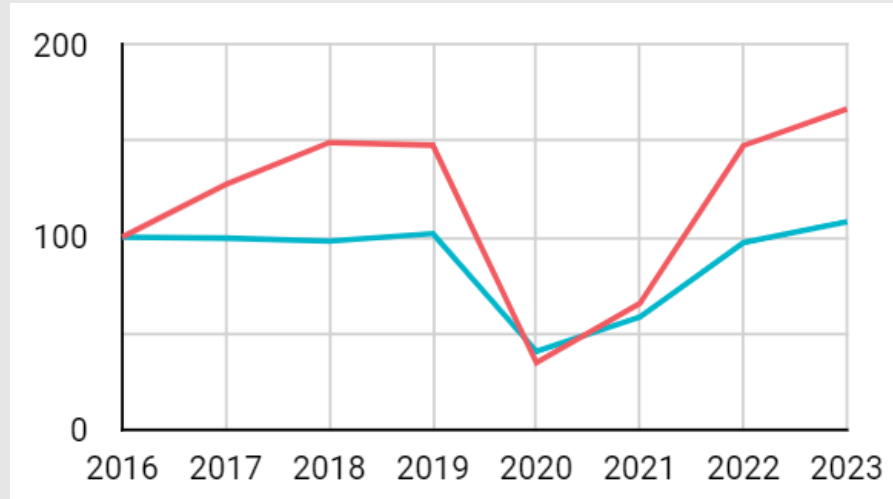
Lux.-City (excl. camping)	15.150	+9% (vs. 2022) +4% (vs. 2019)
Guttland (excl. camping)	5.162	+13% (vs. 2022) +73% (vs. 2019)
South	3.886	+24% (vs. 2022)+9% (vs. 2019)
Guttland/Lux.-City (camping)	620	+29% (vs. 2022)-12% (vs. 2019)
Eislek	504	+27% (vs. 2022)+6% (vs. 2019)
Moselle	317	+19% (vs. 2022)-24% (vs. 2019)
MPSL	269	+31% (vs. 2022)-13% (vs. 2019)

Arrivals in paid accommodation

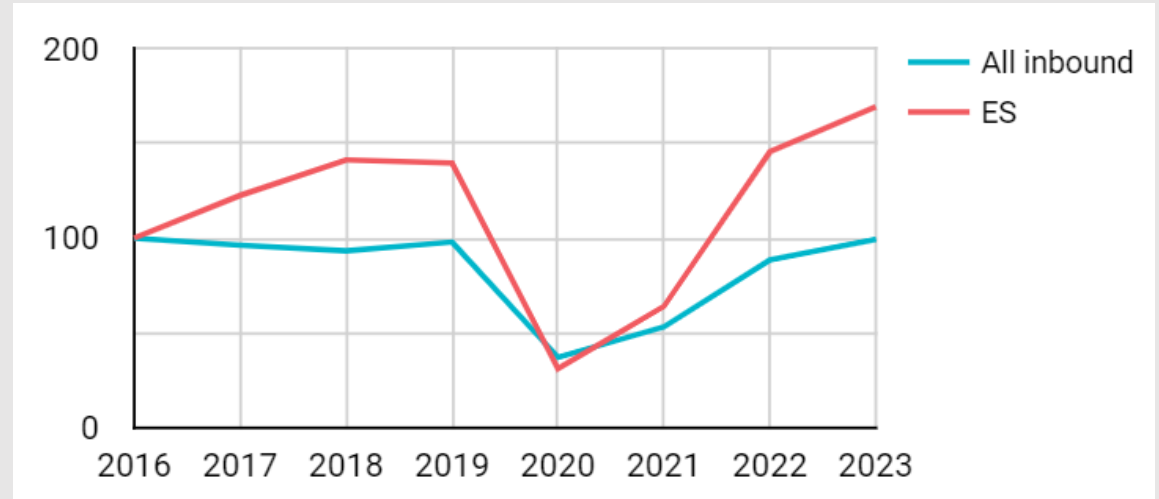
Trends 2016-2023



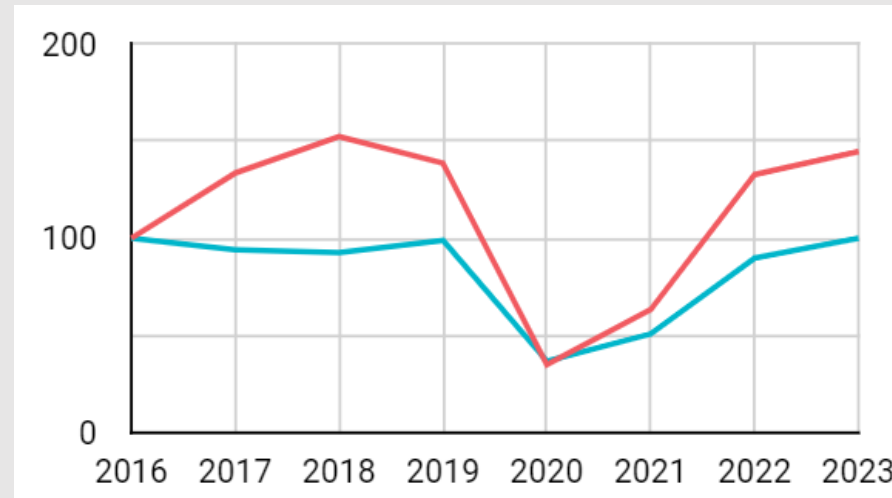
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



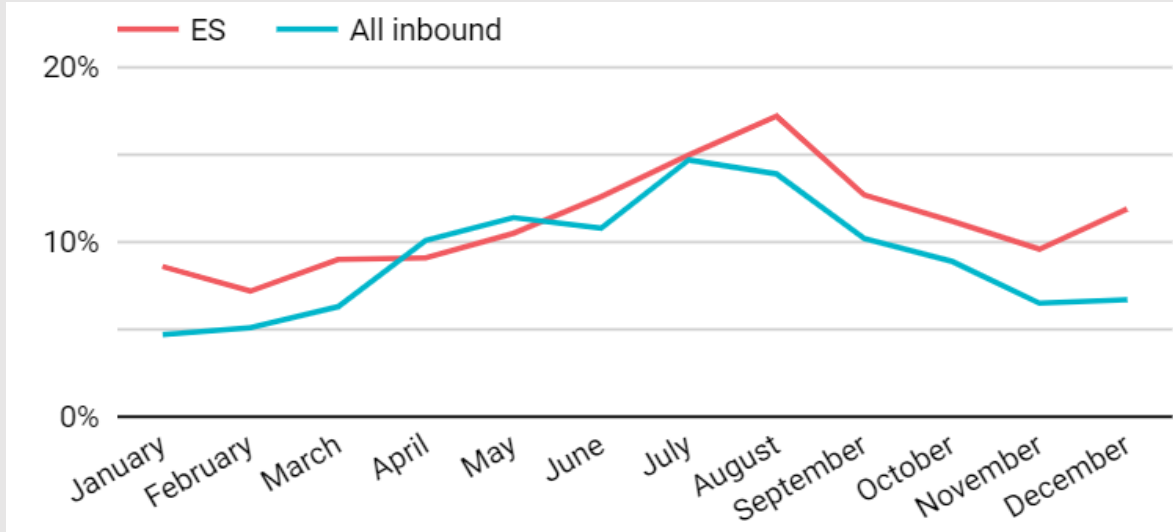
(*) excluding camping.
Source: Statec

Arrivals in paid accommodation

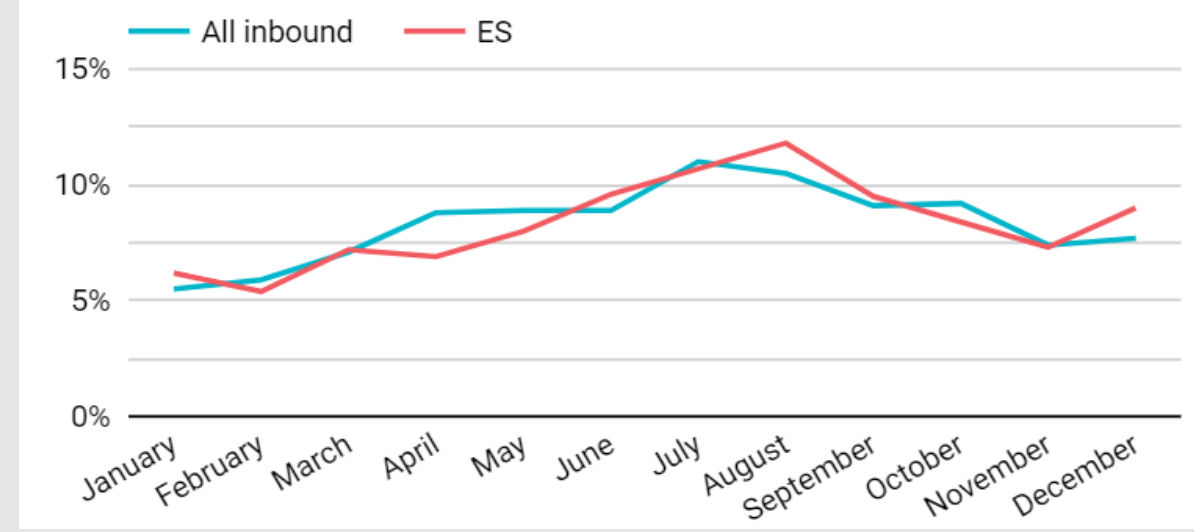
Seasonality



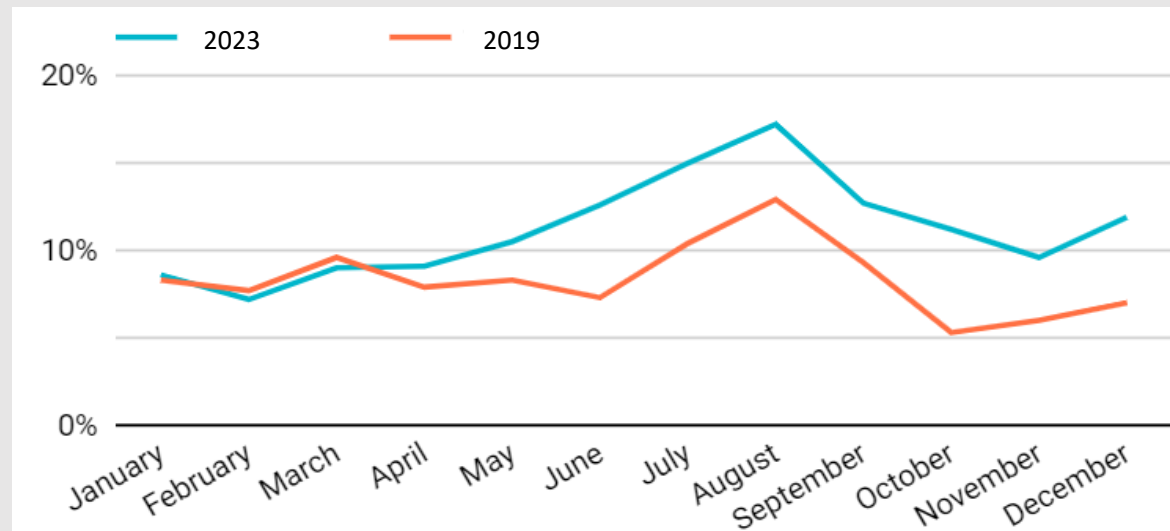
All paid accommodation, 2023



Hotels, 2023



All paid accommodation, arrivals from Spain



Short-term rentals

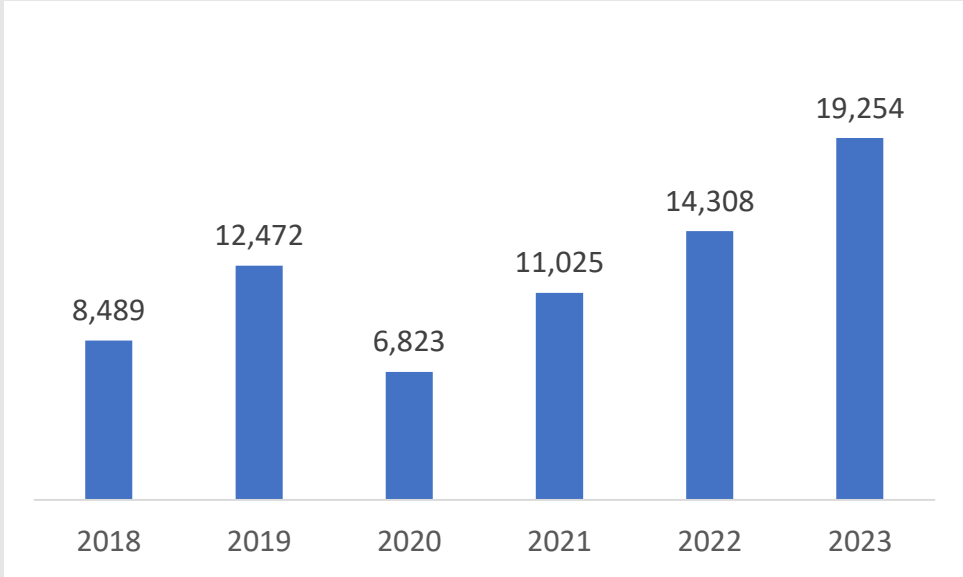


**Nights,
Short-term rentals, 2023**



+35% (vs. 2022)
+54% (vs. 2019)

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





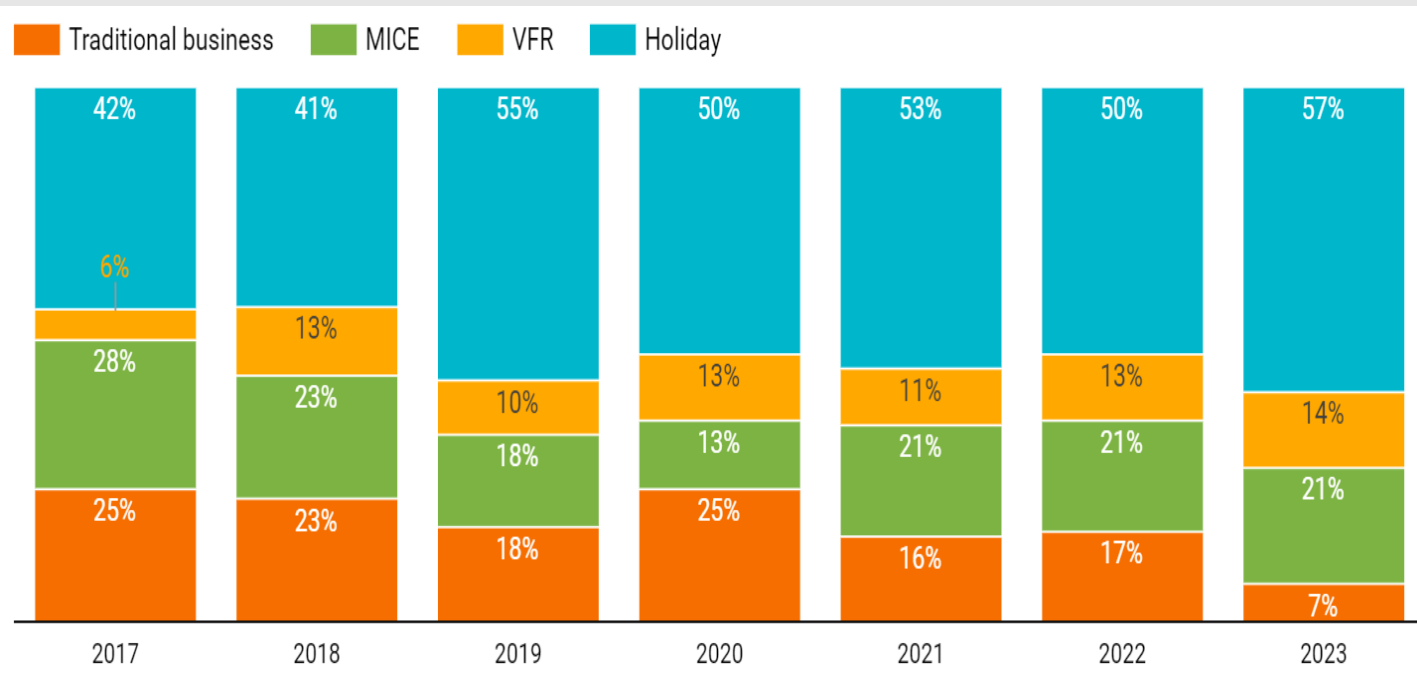
Characteristics of Spanish inbound trips to Luxembourg

Spanish trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2017-2023

Spanish trips to Luxembourg, 2017-2023



2023

Spain to Luxembourg Europe to Luxembourg

Holiday	57%	62%
VFR	14%	15%
MICE	21%	14%
Traditional Business	7%	9%



Travel behaviour of Spanish leisure visitors in Luxembourg

Holiday types

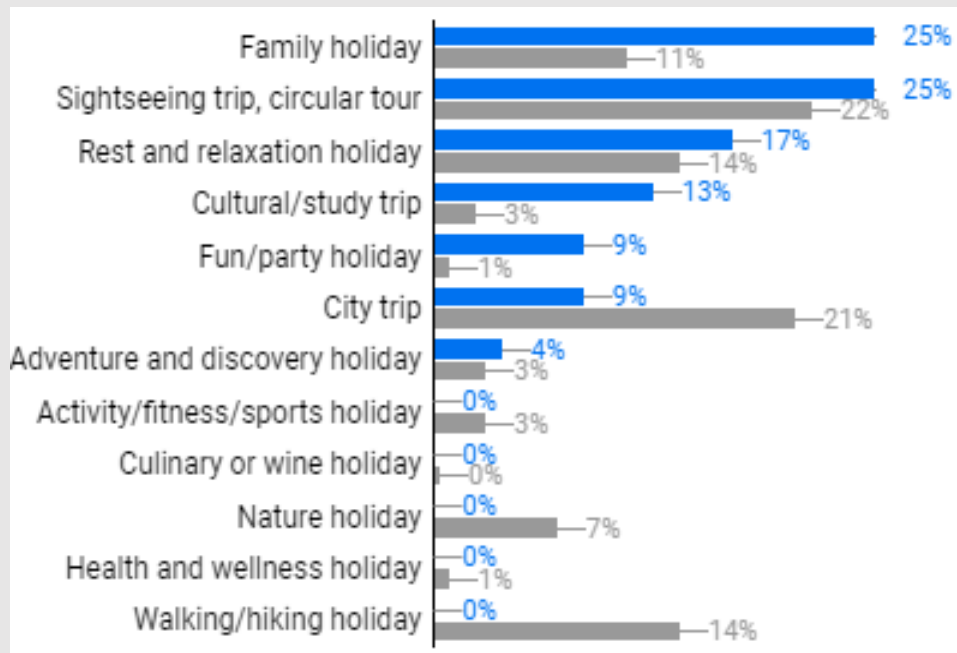
Inbound leisure visitors with overnight, 2022-2023



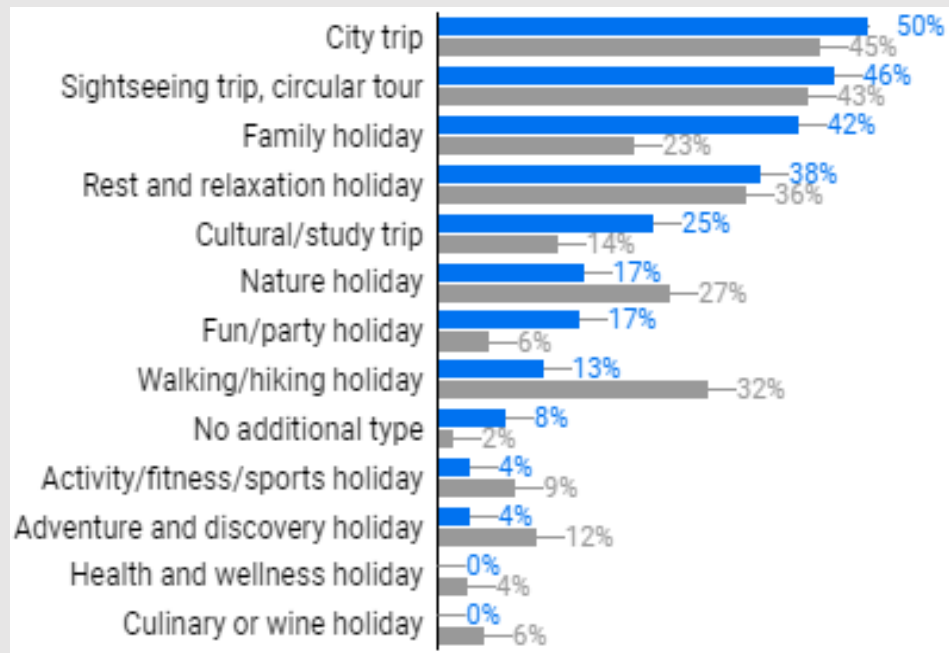
Spain

All inbound

Main holiday types

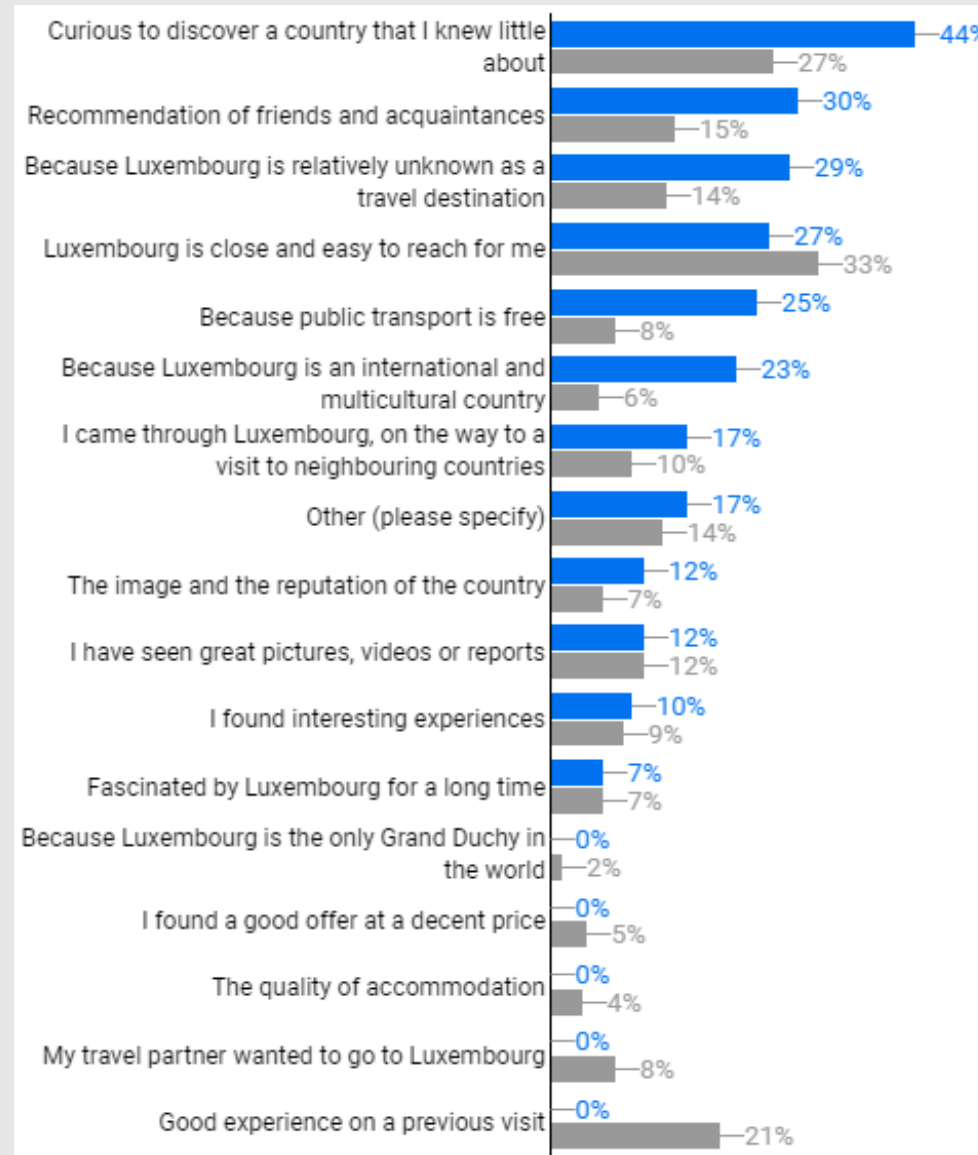
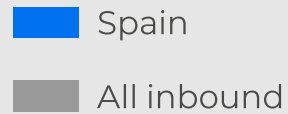


Additional holiday types



Key decision criteria for choosing Luxembourg

Inbound leisure visitors with overnight (*), 2022-2023



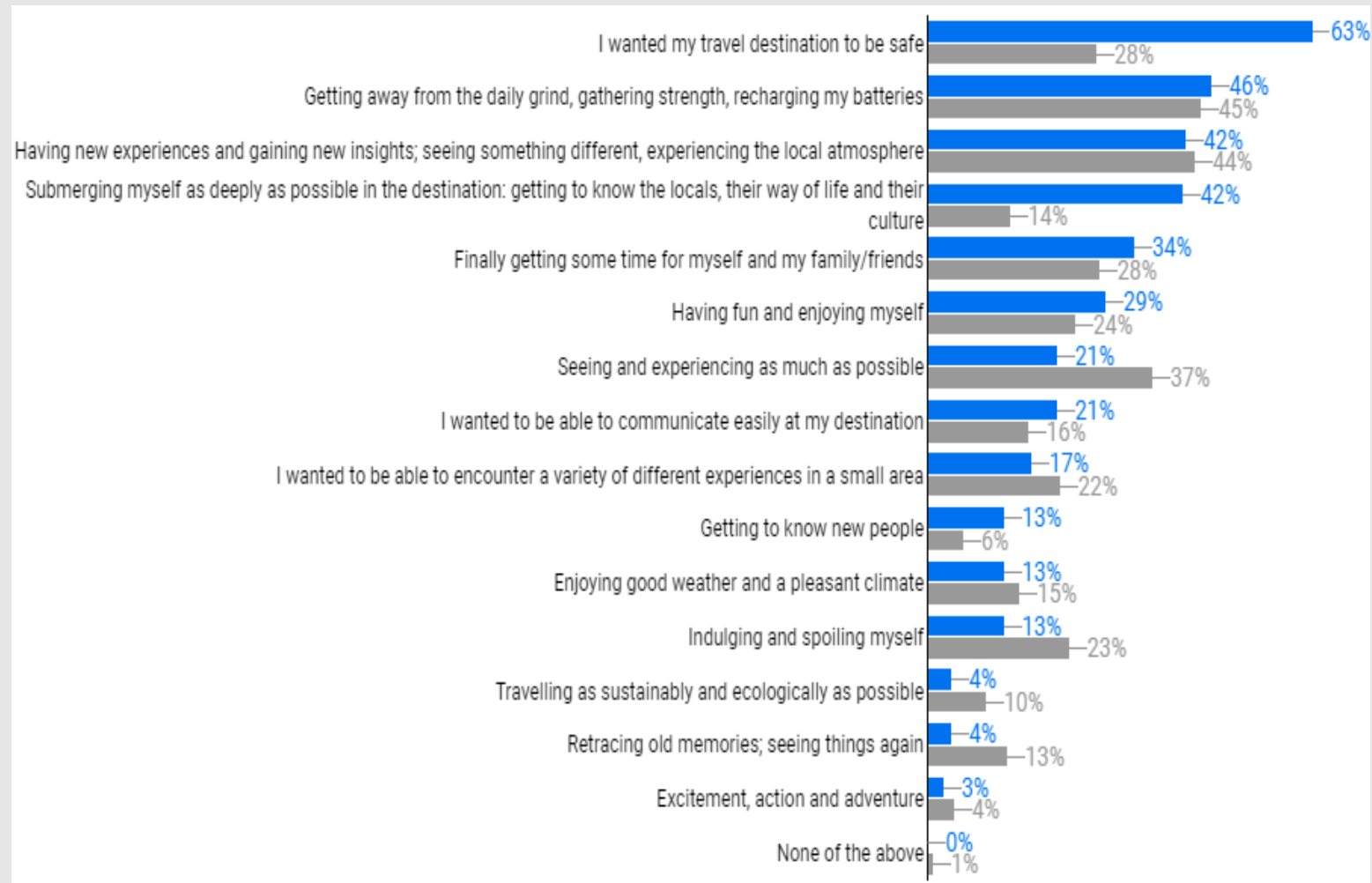
Key travel motivations

Inbound leisure visitors with overnight, 2022-2023



Spain

All inbound



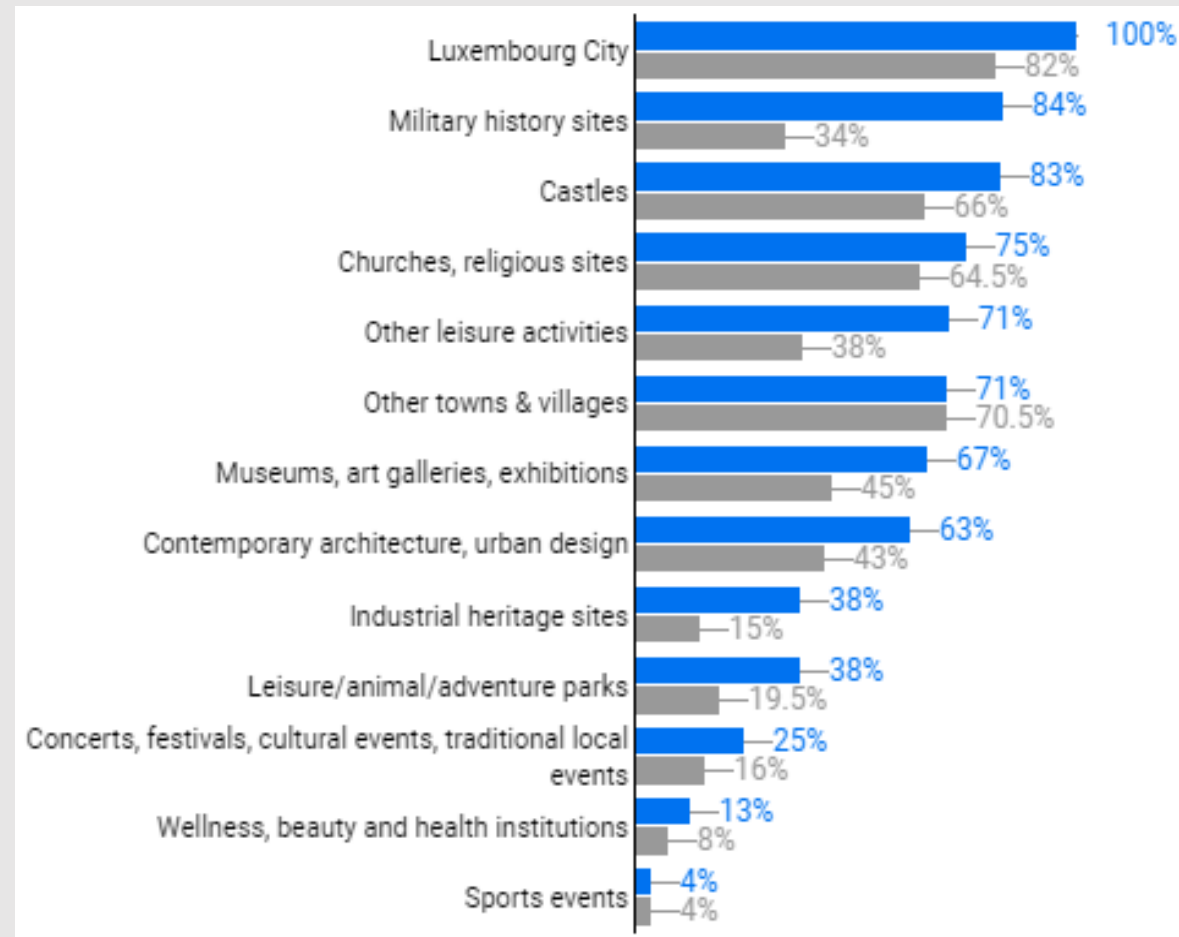


Type of places visited in Luxembourg

Inbound leisure visitors with overnight, 2022-2023

Spain

All inbound

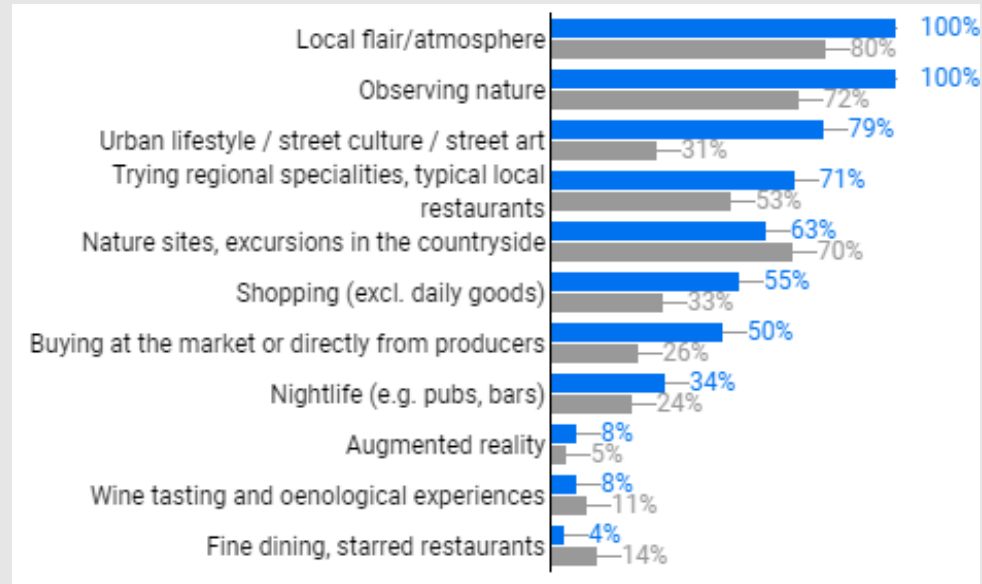


Activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2022-2023

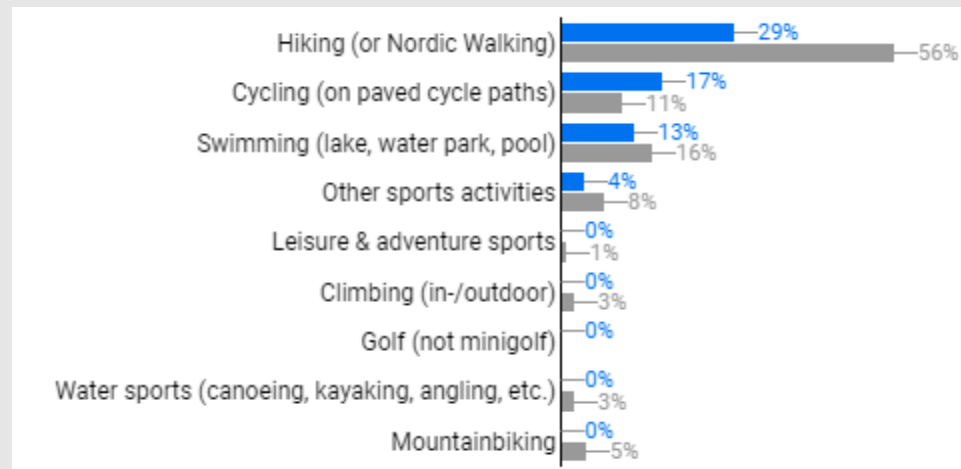


Non-sporting activities



Spain
All inbound

Sporting activities



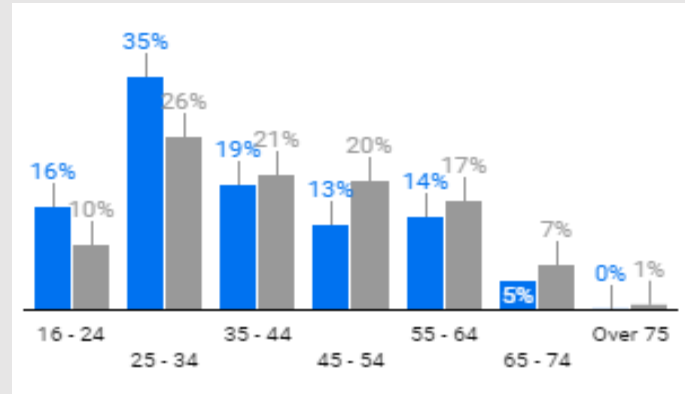
Transport, travel party, age, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2022-2023

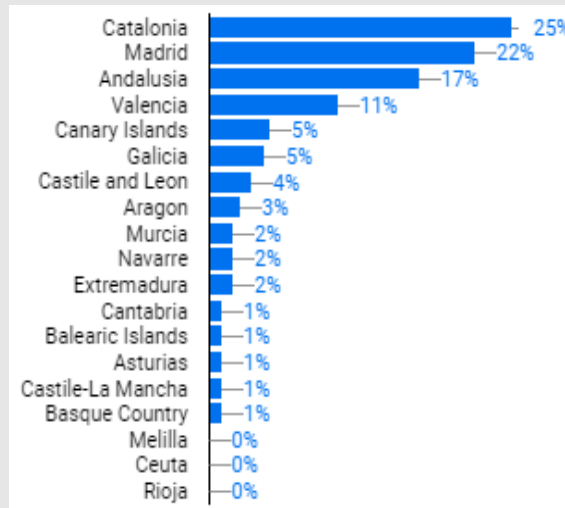


Spain (blue square) All inbound (grey square)

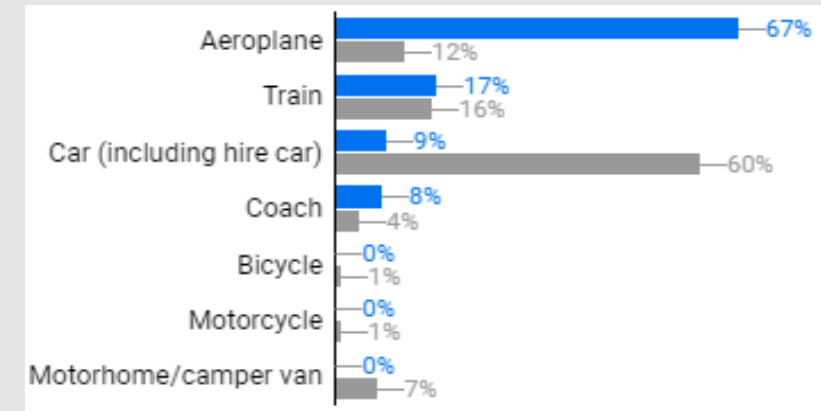
Age groups



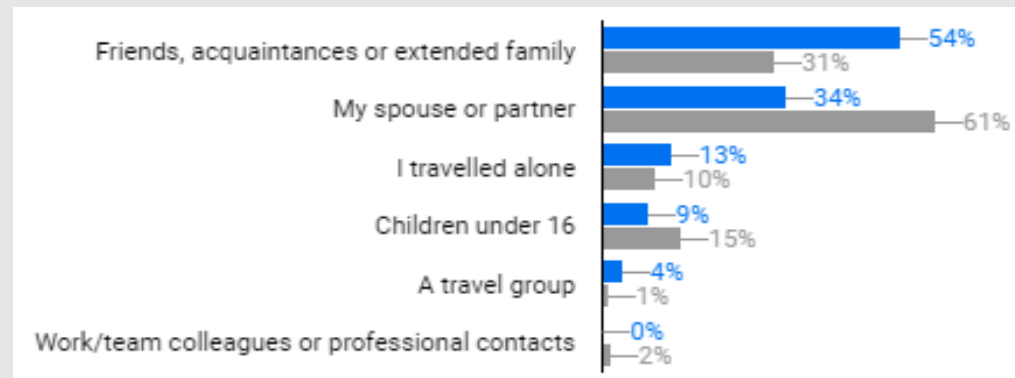
Region of origin



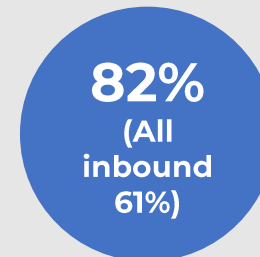
Mode of transport to access Luxembourg



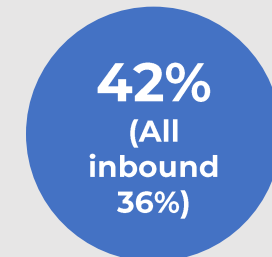
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

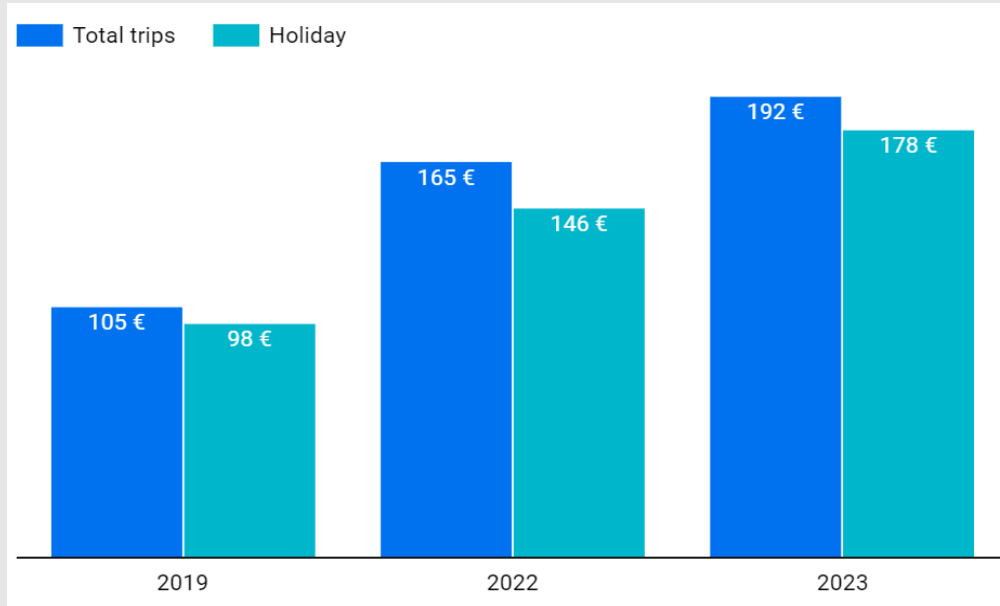


Expenditure

Inbound trips to Luxembourg with overnight



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

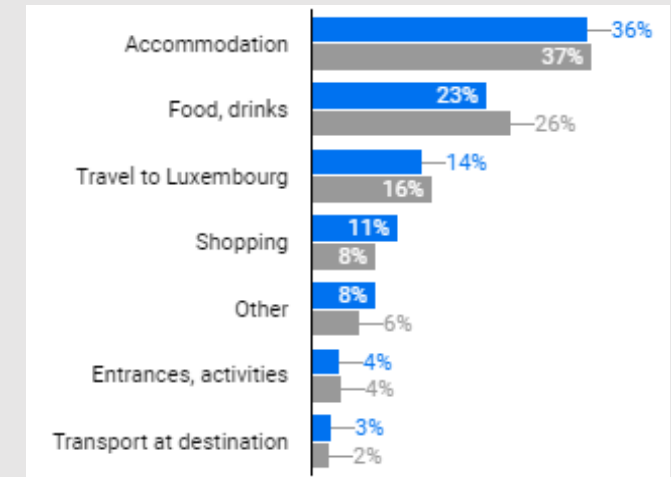


2023

	Spain to Luxembourg	Europe to Luxembourg
Spend/day/pers. on all trips	192 €	152 €
Spend/day/pers. on holiday trips	178 €	144 €

Expenditure of leisure inbound overnight visitors by categories, 2022-2023

Spain
All inbound



Quality vs. price orientation

Spain
All inbound

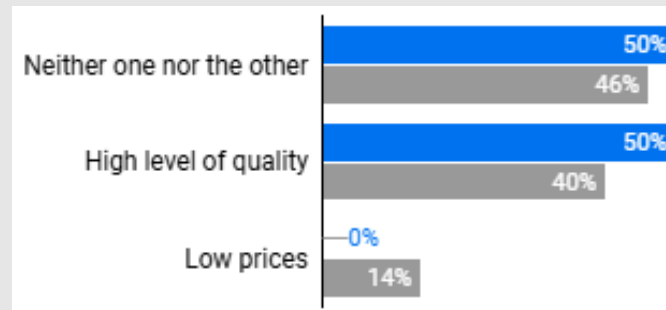
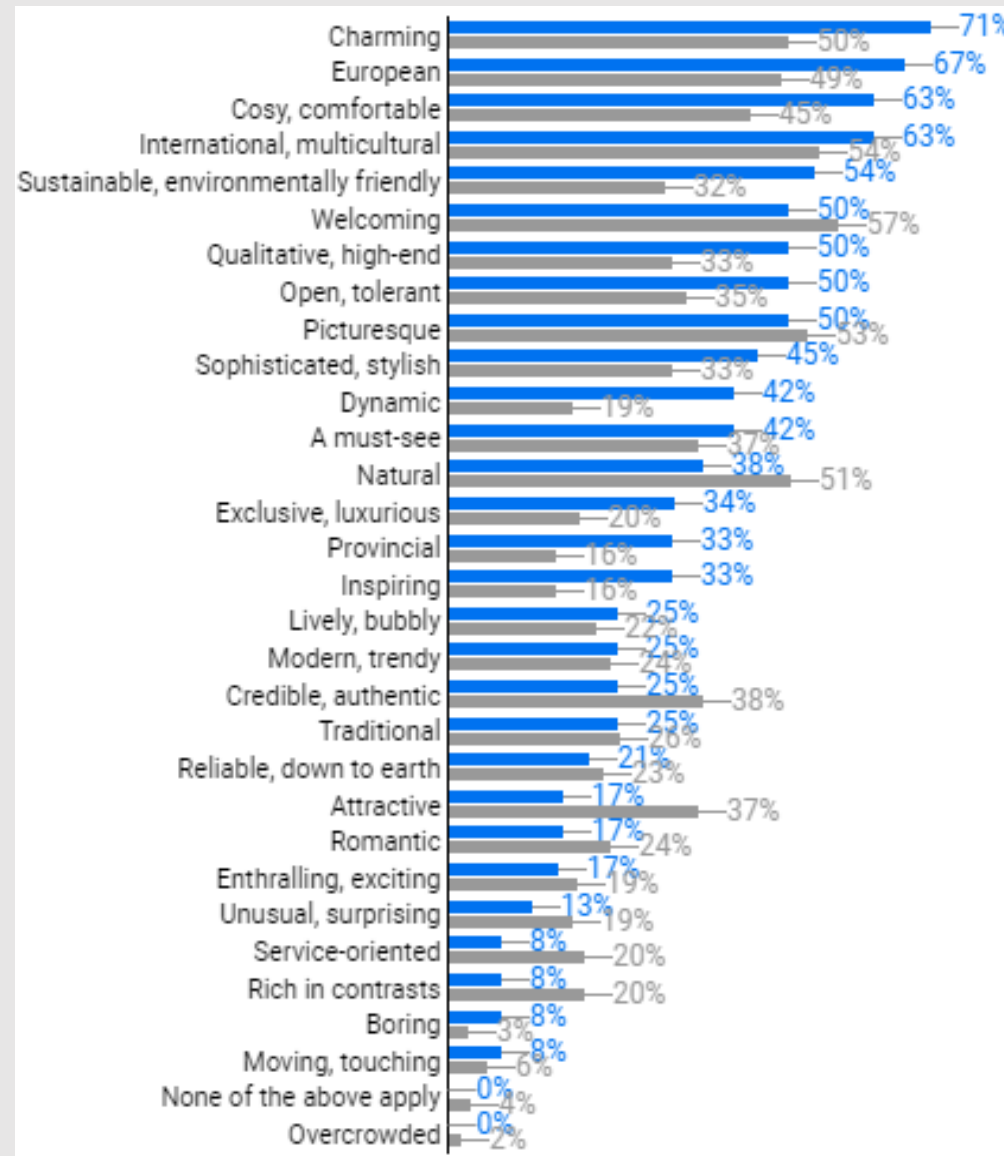


Image perception of Luxembourg

Inbound leisure visitors with overnight, 2022-2023

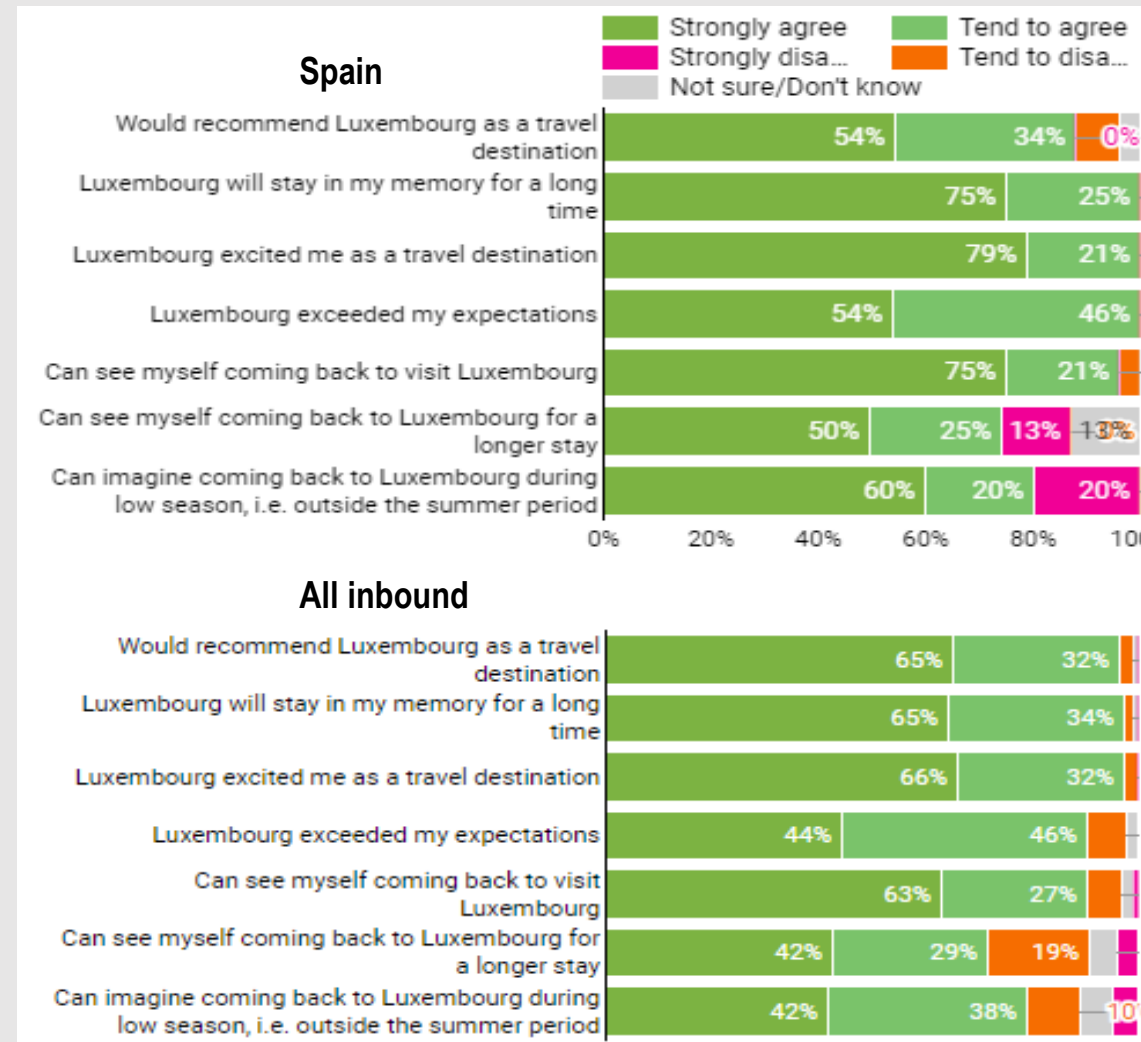


Spain
All inbound



Visitor satisfaction and recommendation

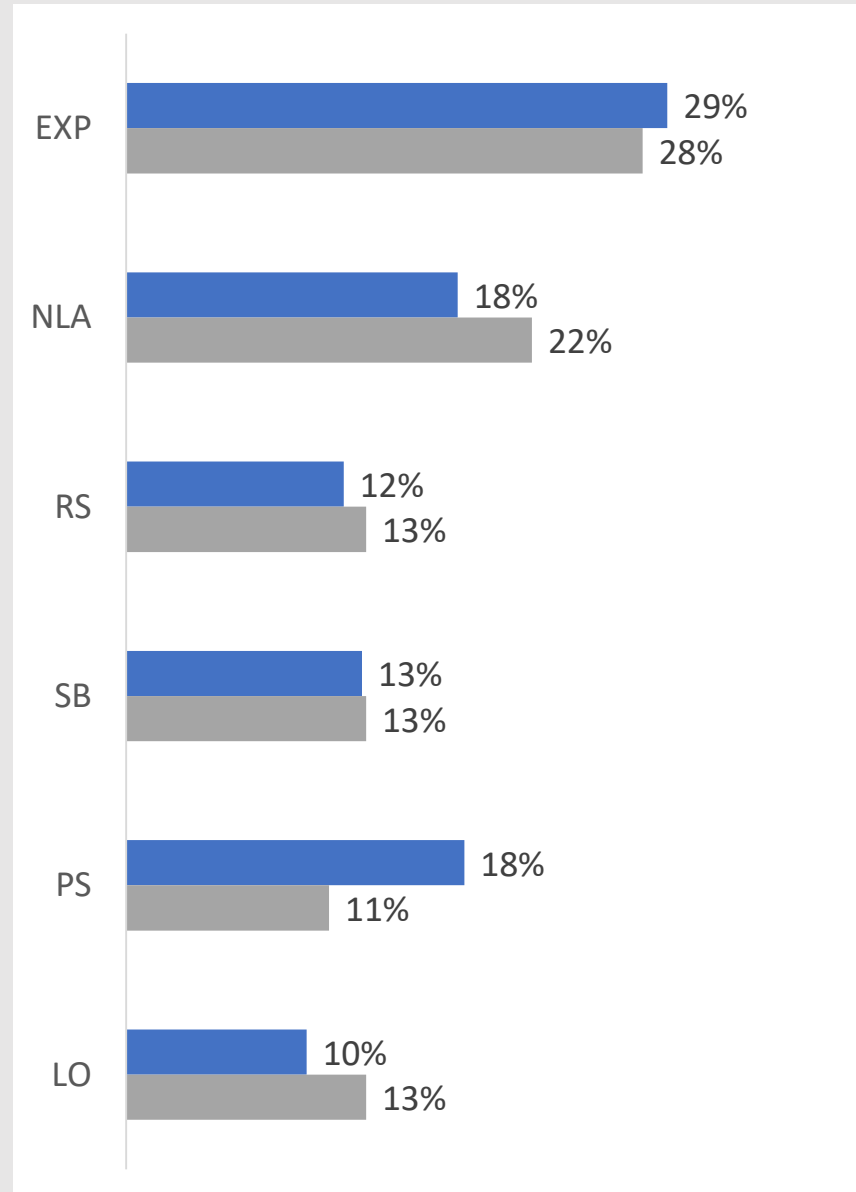
Inbound leisure visitors with overnight, 2022-2023



LFT Target Segments



- Explorers**
- Nature-Loving Actives**
- Relaxation Seekers**
- Short Breakers**
- Perfection Seekers**
- Leisure-Oriented**



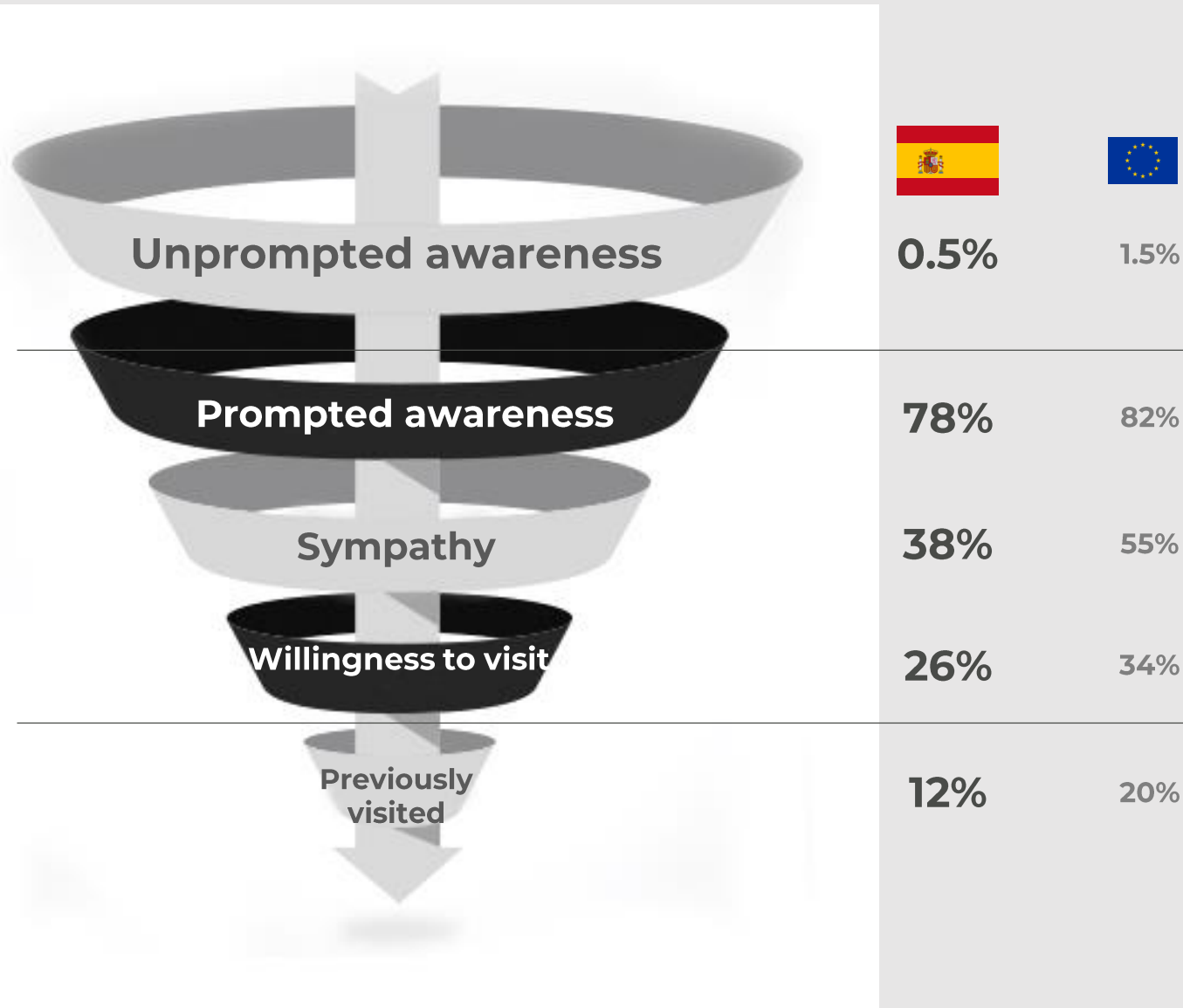
Spain
All inbound



Brand strength & Growth potential

Brand Funnel 2022

Assessing Luxembourg's brand strength as a destination

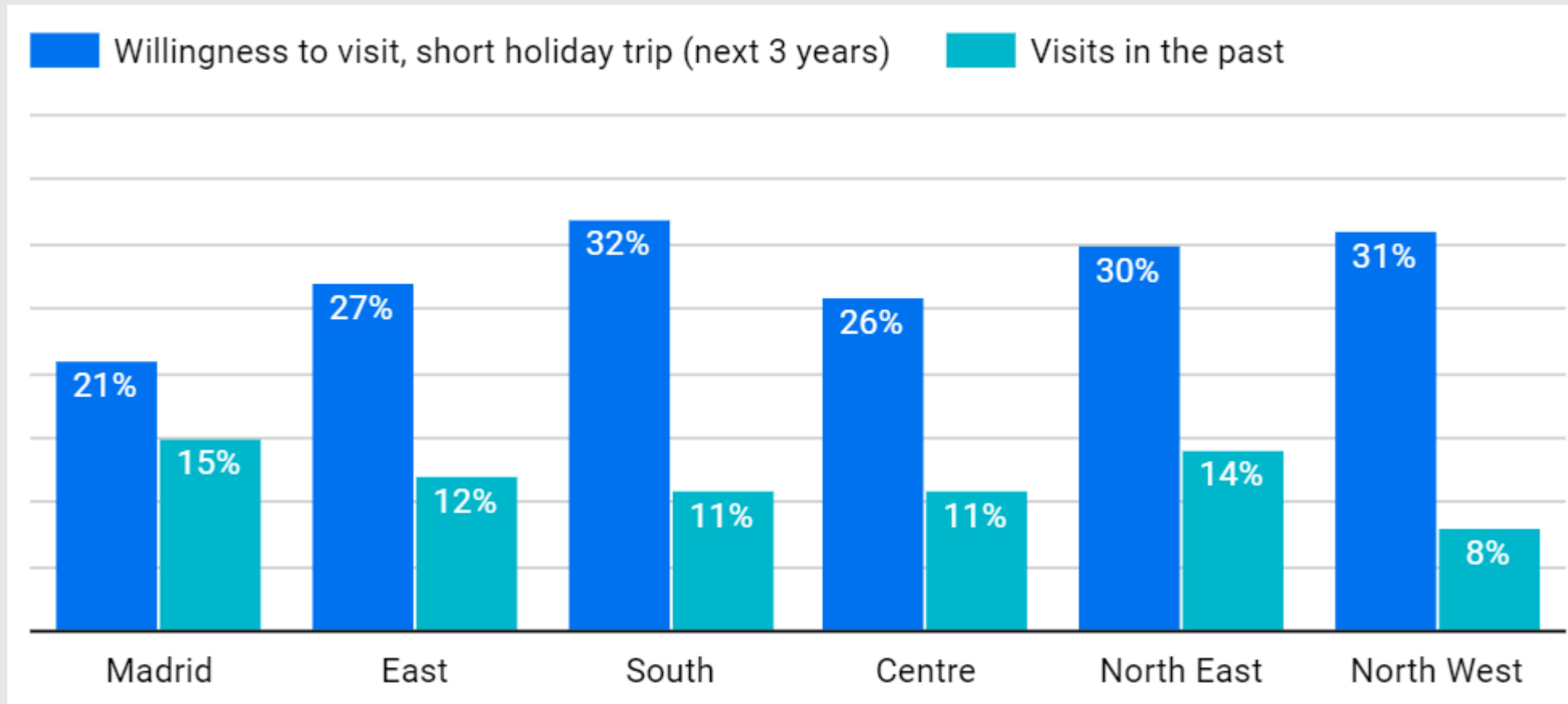


**Total future visitor potential
from Spain (*)**
9.2 million

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




Regional origin 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	6	1	36%
City	1	2	35%
Culture	5	3	33%
Resting/Relaxation	2	4	29%
Nature	4	5	28%
History/Unesco	10	6	27%
Culinary	3	7	25%
Cycling	13	8	24%
Wellness	12	9	21%
Shopping	8	10	21%
Nightlife (***)	11	11	21%
Hiking	9	12	20%
Family	7	13	18%
MTB	15	14	17%
Active-sports	14	15	15%

Growth potential for themes (**)

- City
- Culinary
- Nature
- Family
- Hiking
- Active-sports
- 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 general theme interest in the source market, and to the theme suitability perception across other source markets (European average).

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	26%
Attractive, appealing	4	2	24%
Authentic	2	3	23%
Surprising	6	4	22%
Not crowded, insider tip	9	5	21%
Lot of variety, diversified	7	6	20%
Service-oriented	5	7	20%
Sustainable	10	8	20%
Welcoming, hospitable	1	9	20%
Lively, hip	8	10	19%

(*) 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





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