



Luxembourg for Tourism

Market profile

UNITED KINGDOM & IRELAND

2022



Economic indicators & General Travel Demand



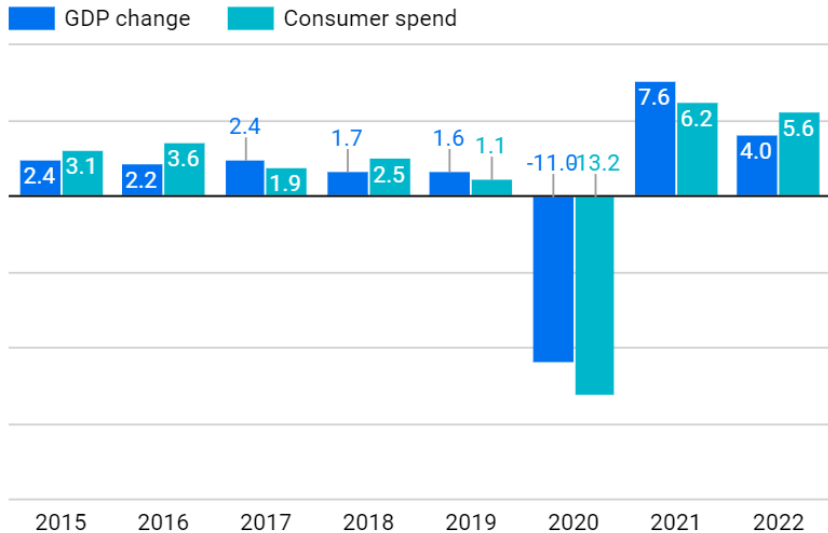
Economic indicators – General travel demand



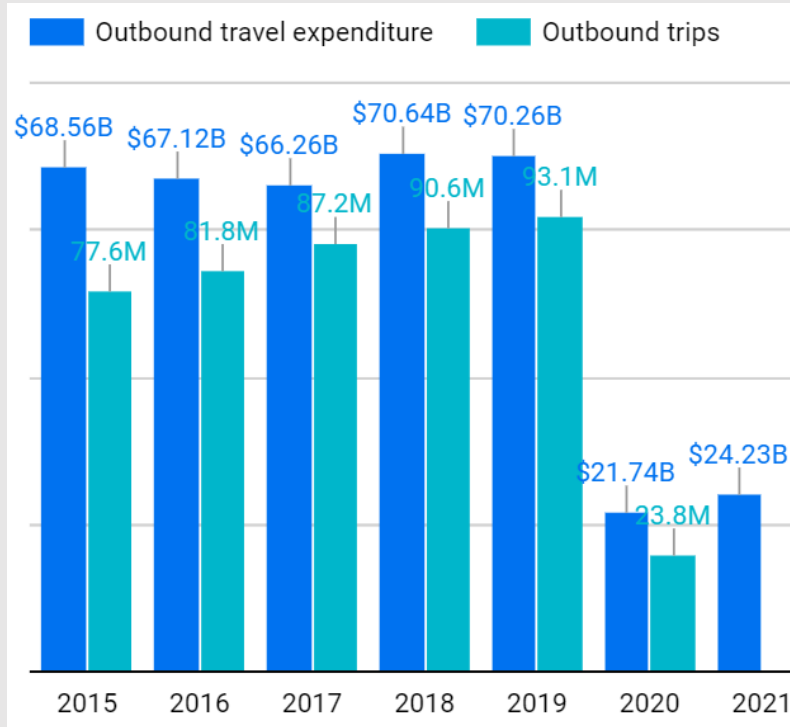
Economy & population

GDP (PPP) per capita **\$45,674** Unemployment (%) **4.1** Population (mn) **67.5** Inflation (%) **7.9**

GDP and Consumer spending, % annual change



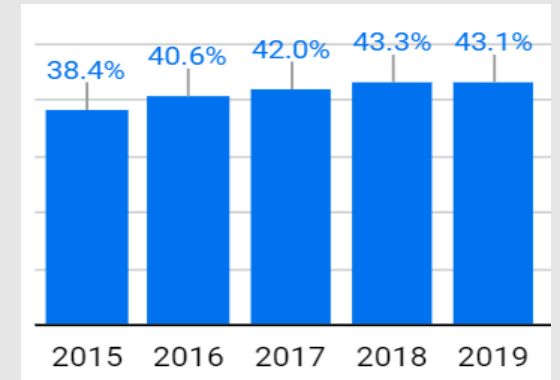
Outbound trips and travel expenditure



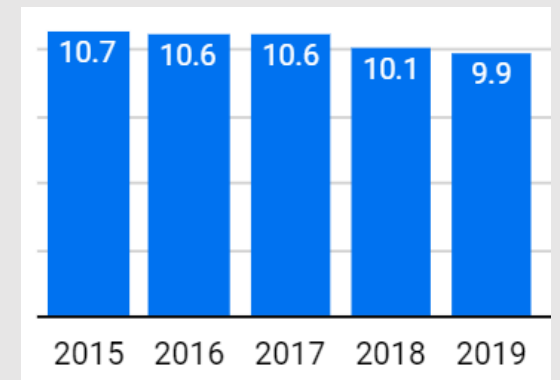
Average spend per outbound trip (2019)
755 \$

Outbound travel intensity
1.39 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)
90.9%



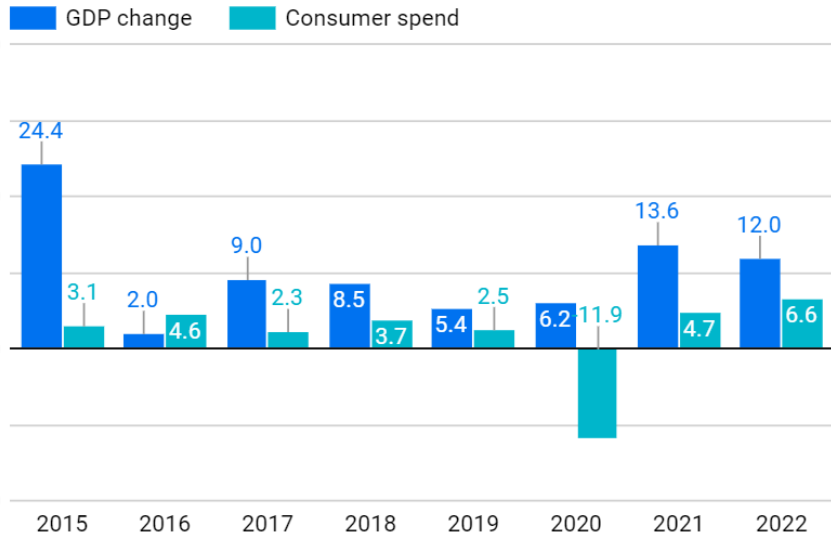
Economic indicators – General travel demand



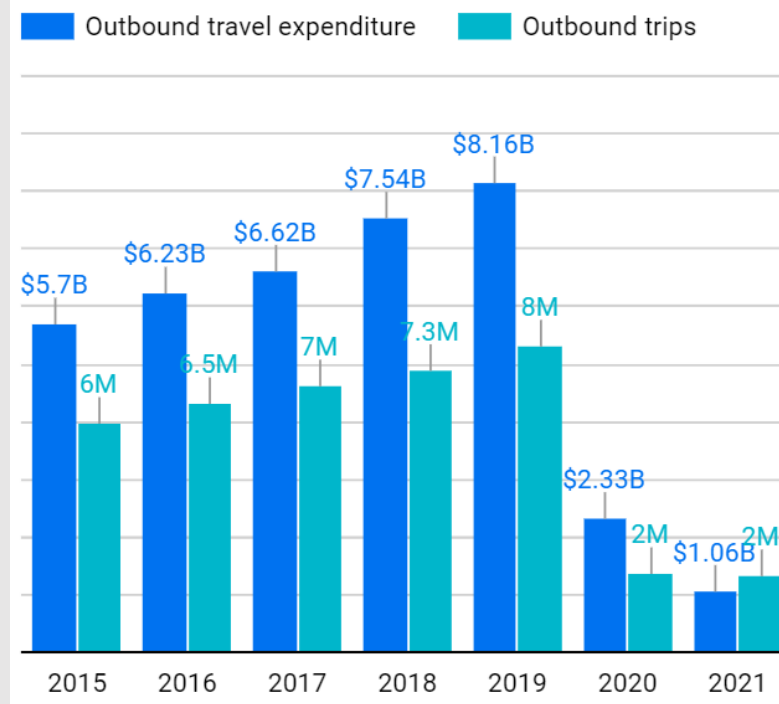
Economy & population

GDP (PPP) per capita **\$108,214** Unemployment (%) **5.4** Population (mn) **5.1** Inflation (%) **7.8**

GDP and Consumer spending, % annual change



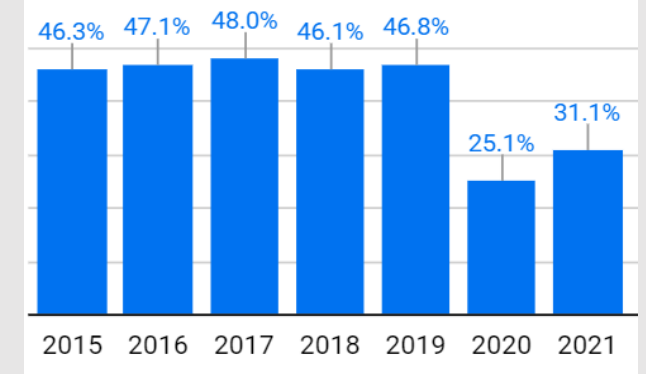
Outbound trips and travel expenditure



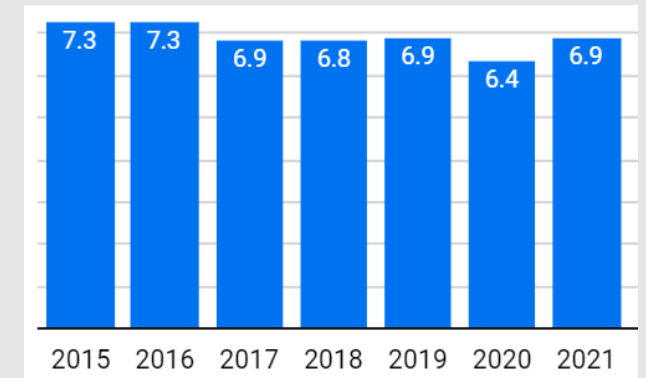
Average spend per outbound trip (2019)
1.018 \$

Outbound travel intensity
1.62 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)
88.9%

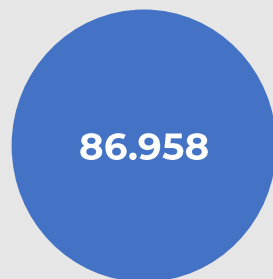


Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2022



**Nights,
paid accommodation, 2022**



+355% (vs. 2021)
-32% (vs. 2019)

**Arrivals,
paid accommodation, 2022**



+418% (vs. 2021)
-32% (vs. 2019)

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



-0.27 days (vs. 2021)
+0.01 days (vs. 2019)



**Nights,
paid accommodation, 2022**



+119% (vs. 2021)
+3% (vs. 2019)

**Arrivals,
paid accommodation, 2022**



+125% (vs. 2021)
+8% (vs. 2019)

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



-0.07 days (vs. 2021)
-0.10 days (vs. 2019)

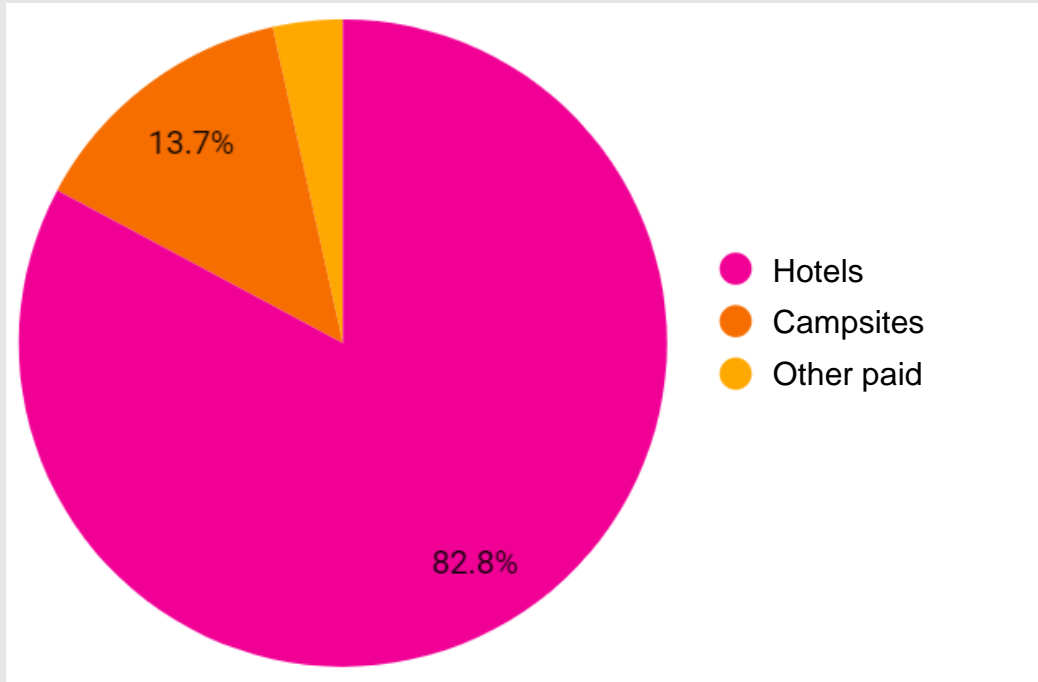


Nights & arrivals in paid accommodation

Type of accommodation, 2022

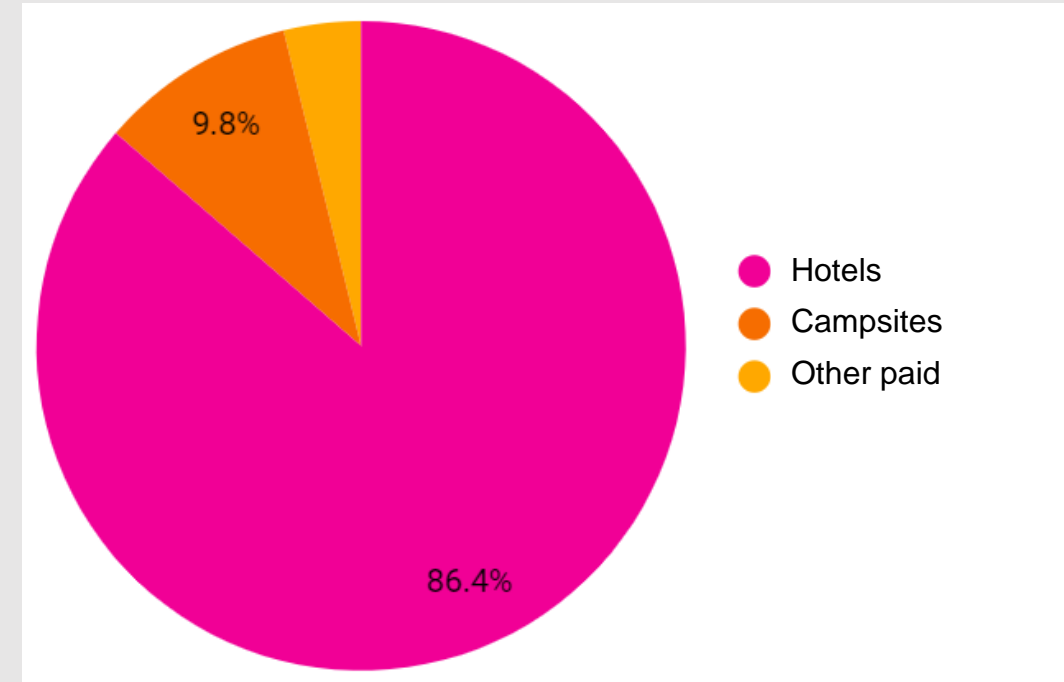


Nights, paid accommodation



| | | |
|------------|--------|-----------------|
| Hotels | 72.076 | -35% (vs. 2019) |
| Campsites | 11.903 | +16% (vs. 2019) |
| Other paid | 3.029 | -48% (vs. 2019) |

Arrivals, paid accommodation



| | | |
|------------|--------|-----------------|
| Hotels | 38.850 | -35% (vs. 2019) |
| Campsites | 4.402 | +16% (vs. 2019) |
| Other paid | 1.728 | -29% (vs. 2019) |

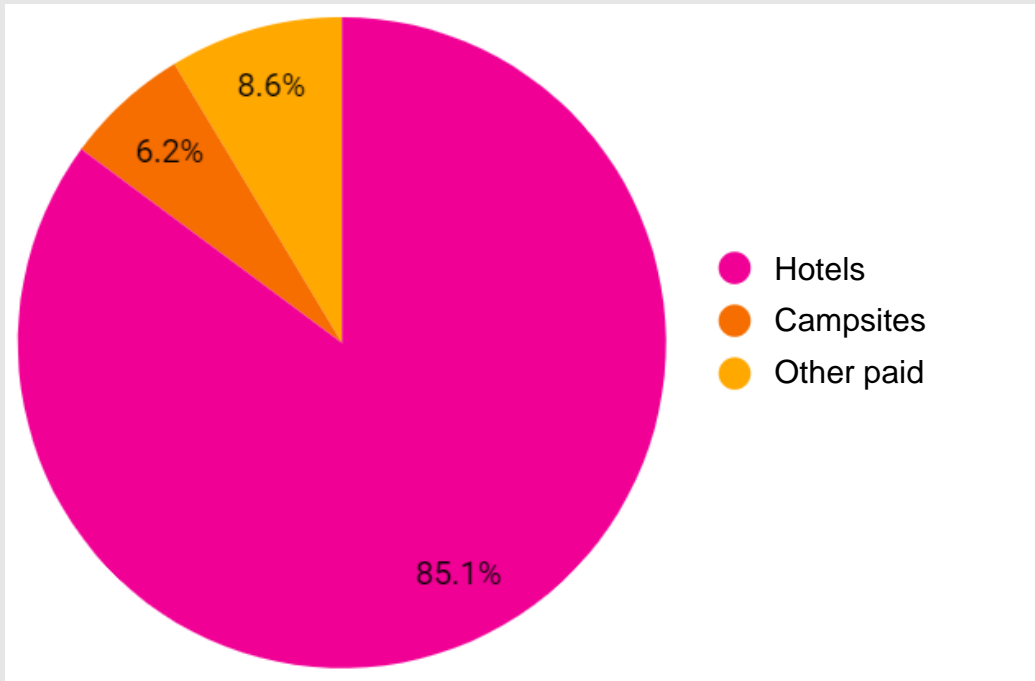


Nights & arrivals in paid accommodation

Type of accommodation, 2022

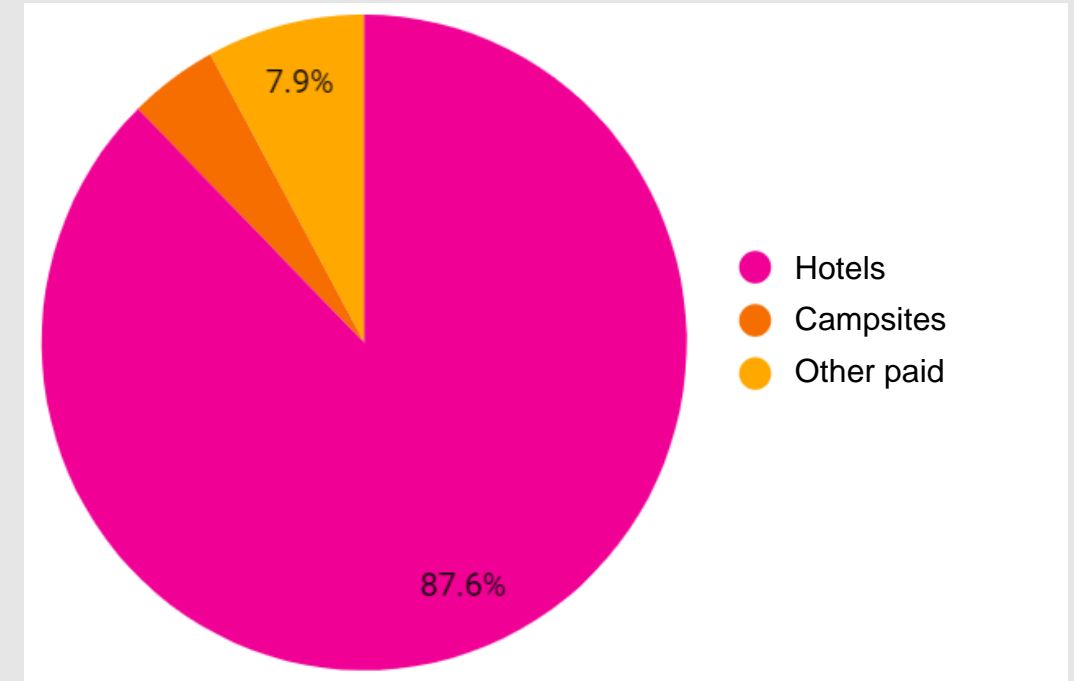


Nights, paid accommodation



| | | |
|------------|--------|----------------|
| Hotels | 12.949 | +3% (vs. 2019) |
| Campsites | 945 | -4% (vs. 2019) |
| Other paid | 1.315 | +9% (vs. 2019) |

Arrivals, paid accommodation



| | | |
|------------|-------|-----------------|
| Hotels | 6.218 | +10% (vs. 2019) |
| Campsites | 317 | -14% (vs. 2019) |
| Other paid | 562 | -4% (vs. 2019) |

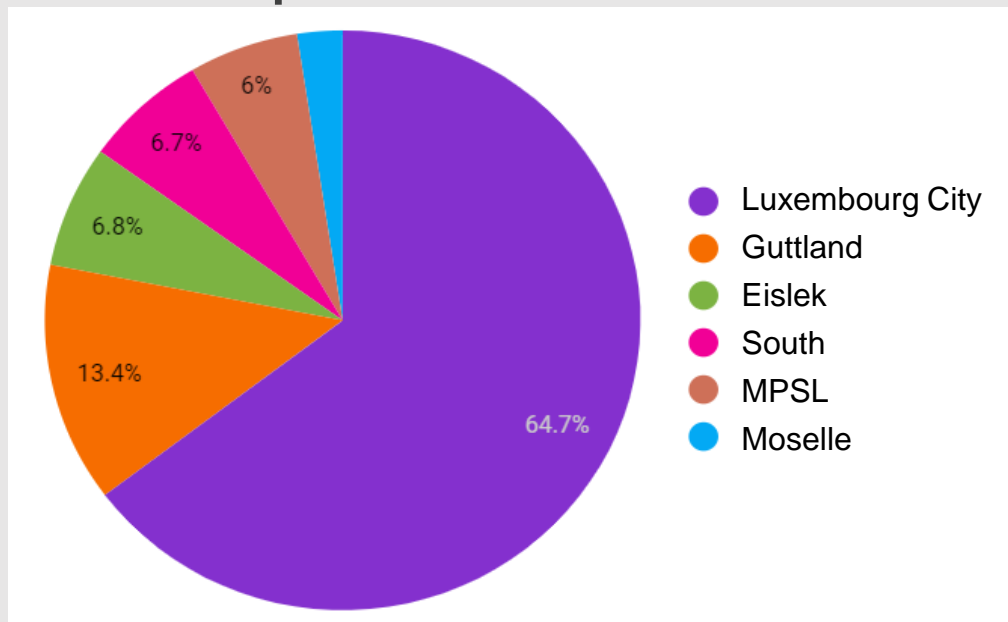


Nights & arrivals in paid accommodation

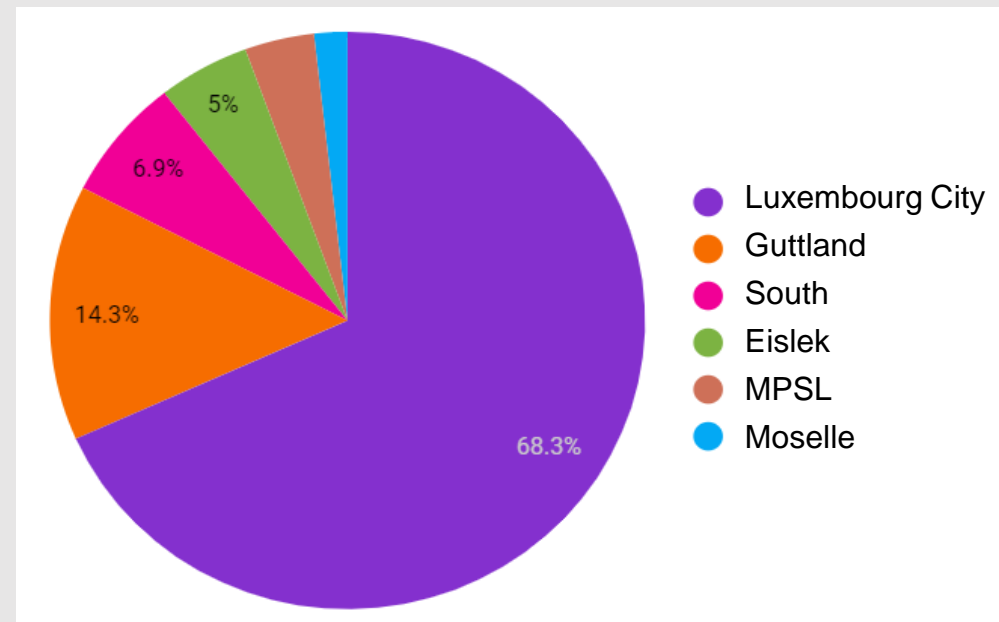
Regions, 2022



**Nights,
paid accommodation**



**Arrivals,
paid accommodation**



| | | |
|------------------------|---------------|------------------------|
| Luxembourg City | 56.266 | -30% (vs. 2019) |
| Guttland | 11.629 | -17% (vs. 2019) |
| Eislek | 5.921 | -63% (vs. 2019) |
| South | 5.825 | -15% (vs. 2019) |
| MPSL | 5.176 | -23% (vs. 2019) |
| Moselle | 2.141 | -32% (vs. 2019) |

| | | |
|------------------------|---------------|------------------------|
| Luxembourg City | 30.715 | -34% (vs. 2019) |
| Guttland | 6.435 | -10% (vs. 2019) |
| South | 3.082 | -23% (vs. 2019) |
| Eislek | 2.237 | -57% (vs. 2019) |
| MPSL | 1.700 | -12% (vs. 2019) |
| Moselle | 811 | -52% (vs. 2019) |

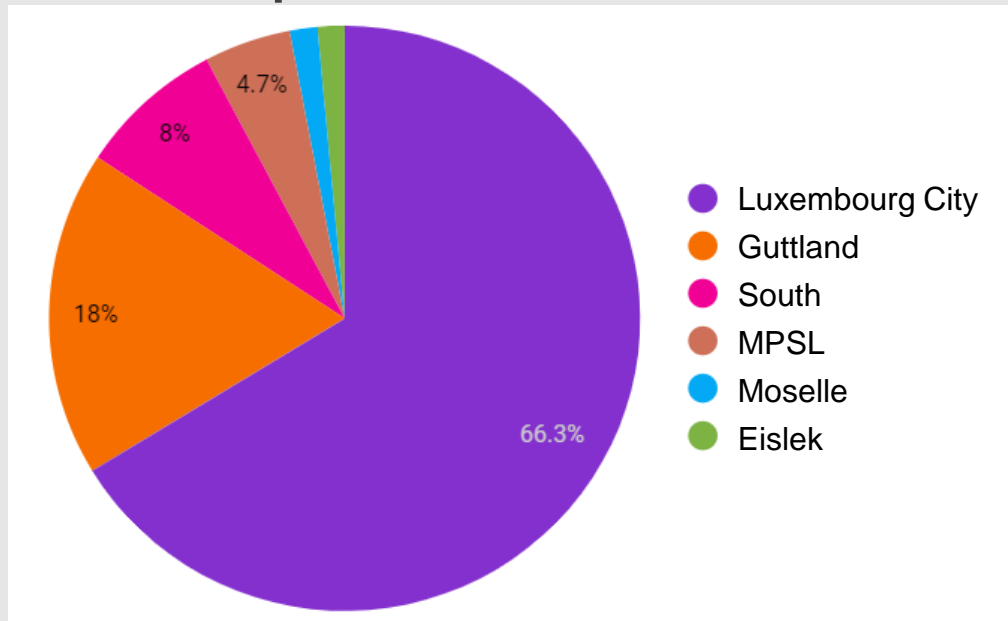


Nights & arrivals in paid accommodation

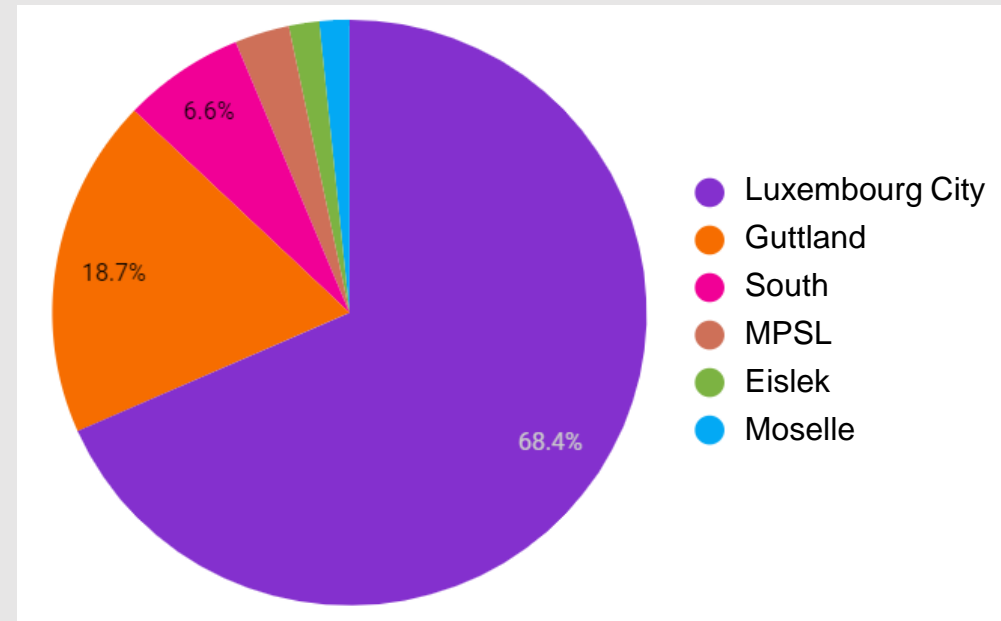
Regions, 2022



Nights, paid accommodation



Arrivals, paid accommodation



| | | |
|-----------------|--------|------------------|
| Luxembourg City | 10.082 | -11% (vs. 2019) |
| Guttland | 2.733 | +41% (vs. 2019) |
| South | 1.217 | +111% (vs. 2019) |
| MPSL | 722 | +56% (vs. 2019) |
| Moselle | 231 | -7% (vs. 2019) |
| Eislek | 224 | +5% (vs. 2019) |

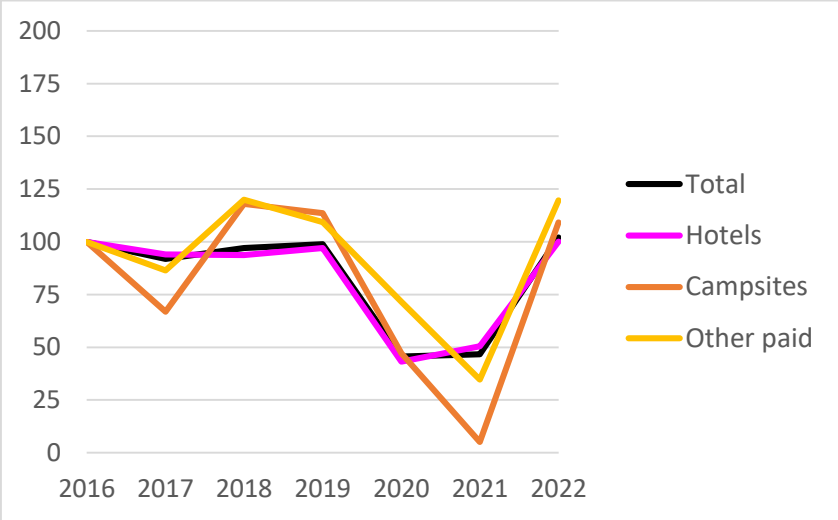
| | | |
|-----------------|-------|------------------|
| Luxembourg City | 4.852 | -9% (vs. 2019) |
| Guttland | 1.330 | +104% (vs. 2019) |
| South | 471 | +47% (vs. 2019) |
| MPSL | 211 | +118% (vs. 2019) |
| Eislek | 117 | +5% (vs. 2019) |
| Moselle | 116 | +68% (vs. 2019) |

Nights in paid accommodation

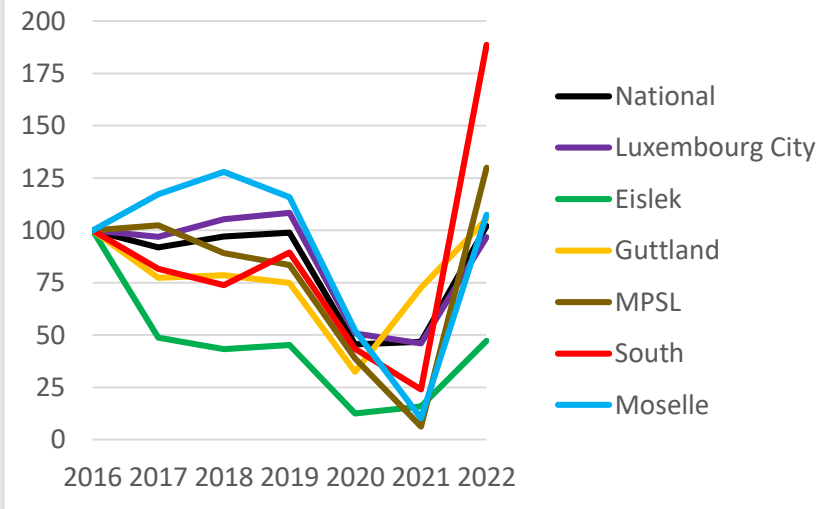
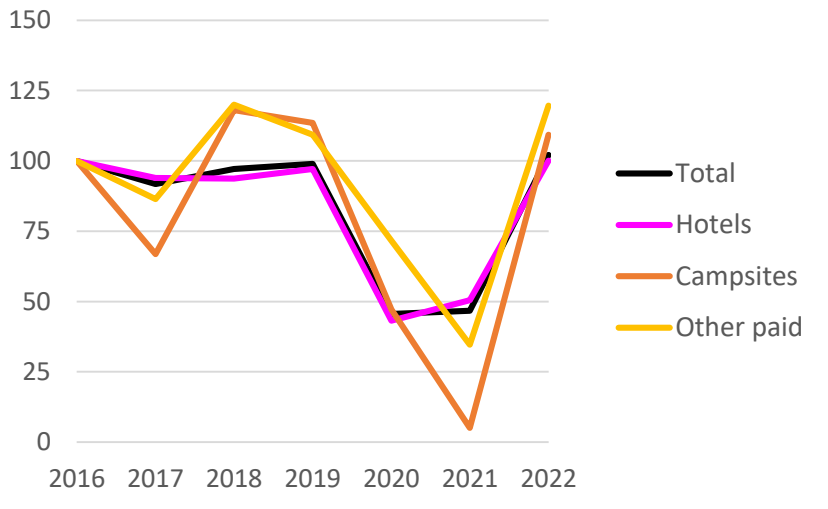
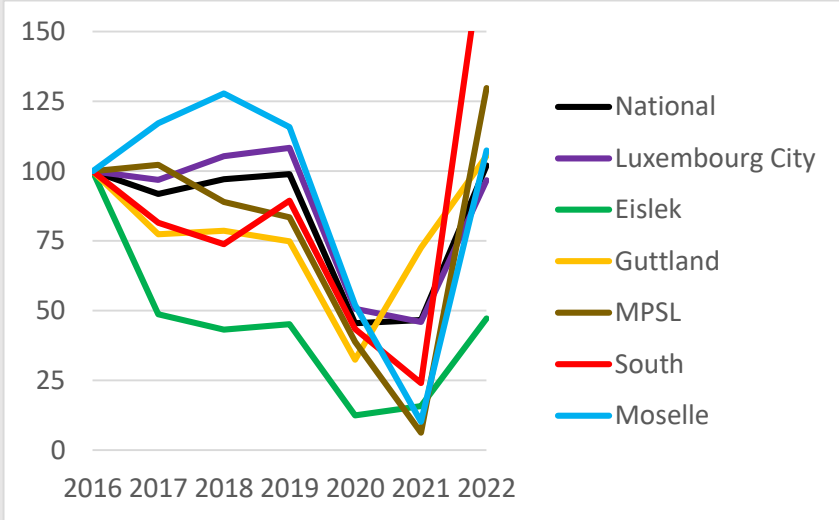
Total, Type of accommodation & Regions : Trends 2016-2022



2016 = Index 100



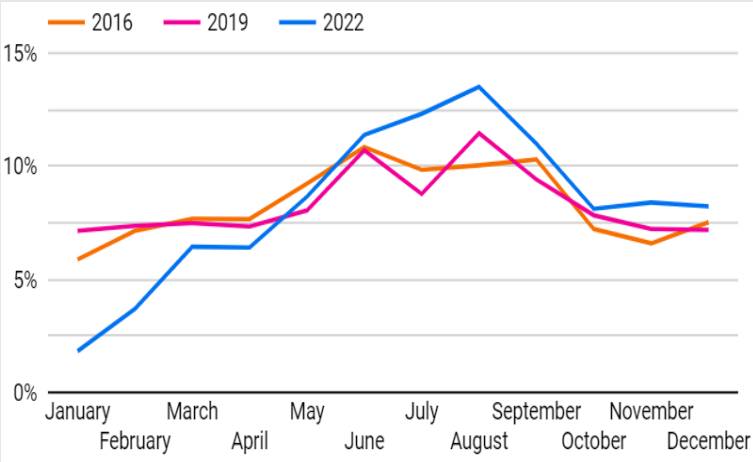
2016 = Index 100



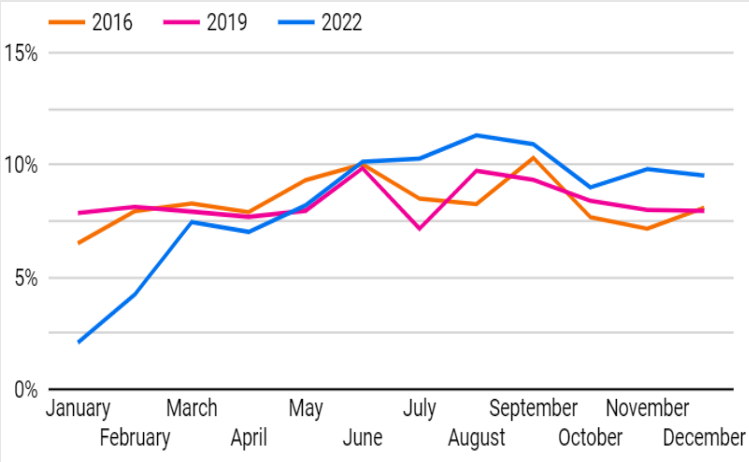
Nights in paid accommodation Seasonality



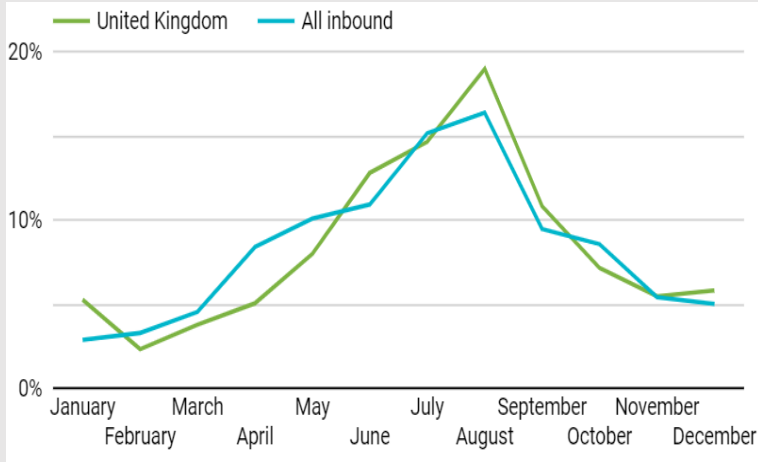
**Nights,
all paid accommodation**



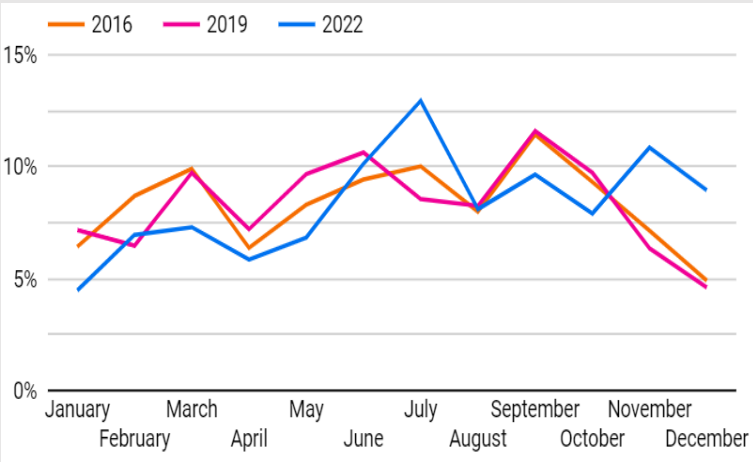
**Nights,
hotels**



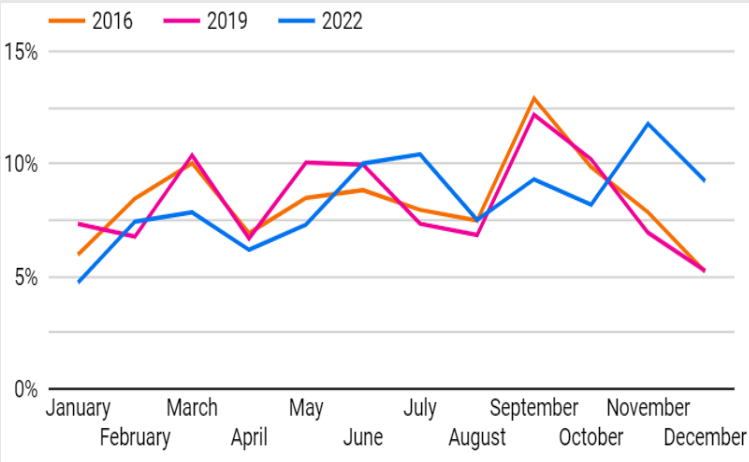
**Nights,
all paid accommodation, 2022**



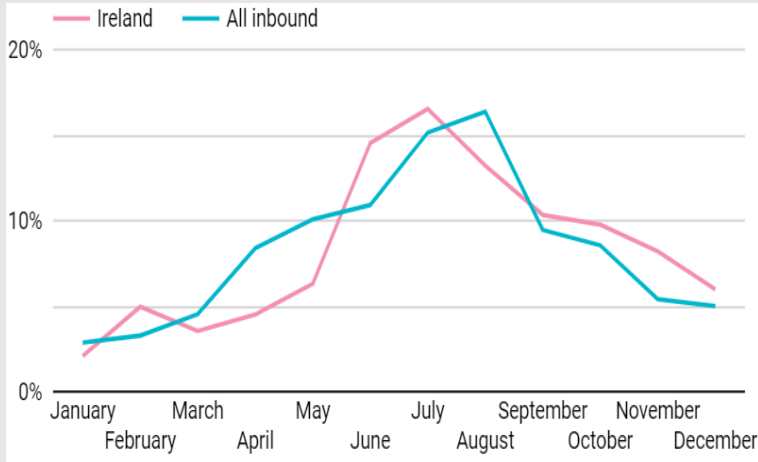
**Nights,
all paid accommodation**



**Nights,
hotels**



**Nights,
all paid accommodation, 2022**

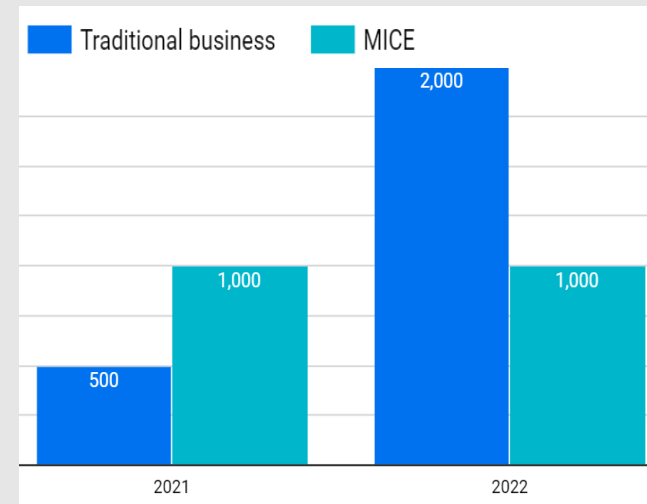
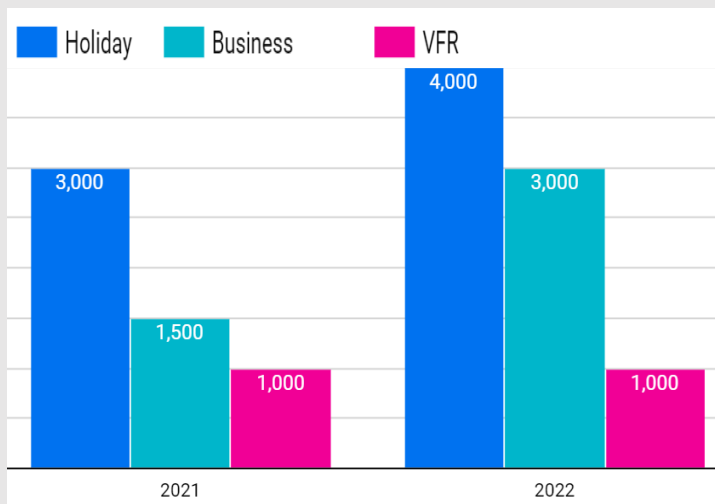
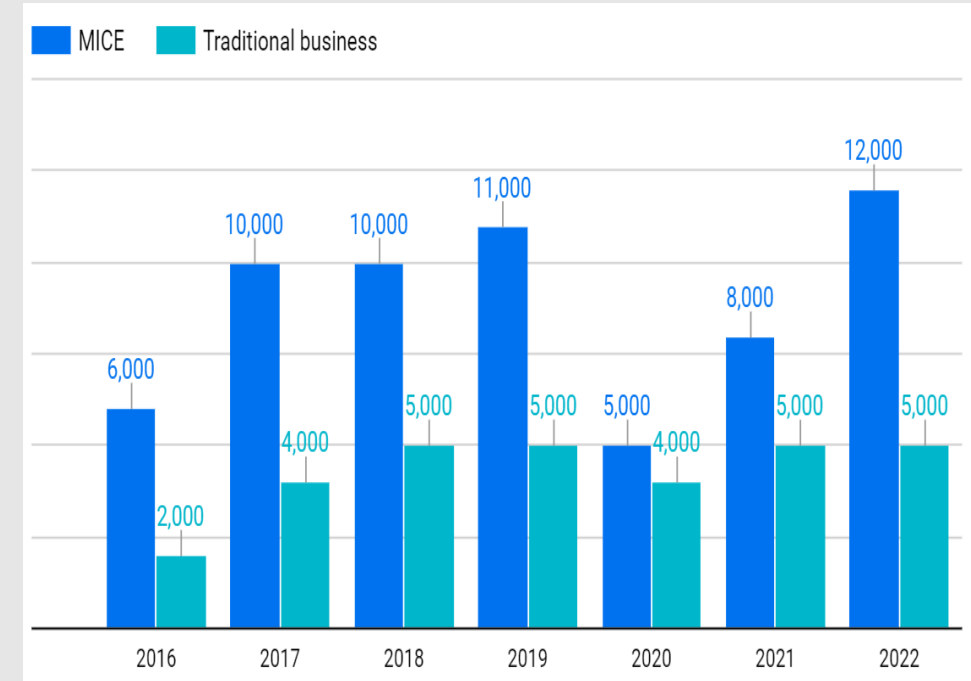
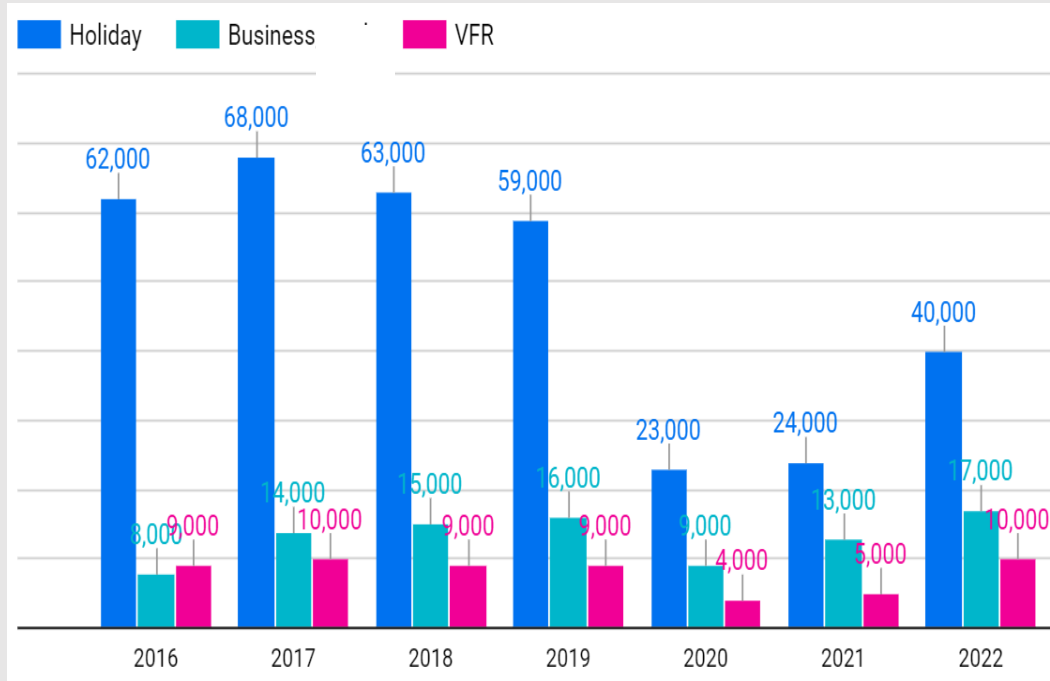




Characteristics of British & Irish inbound trips to Luxembourg

British & Irish trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2016-2022

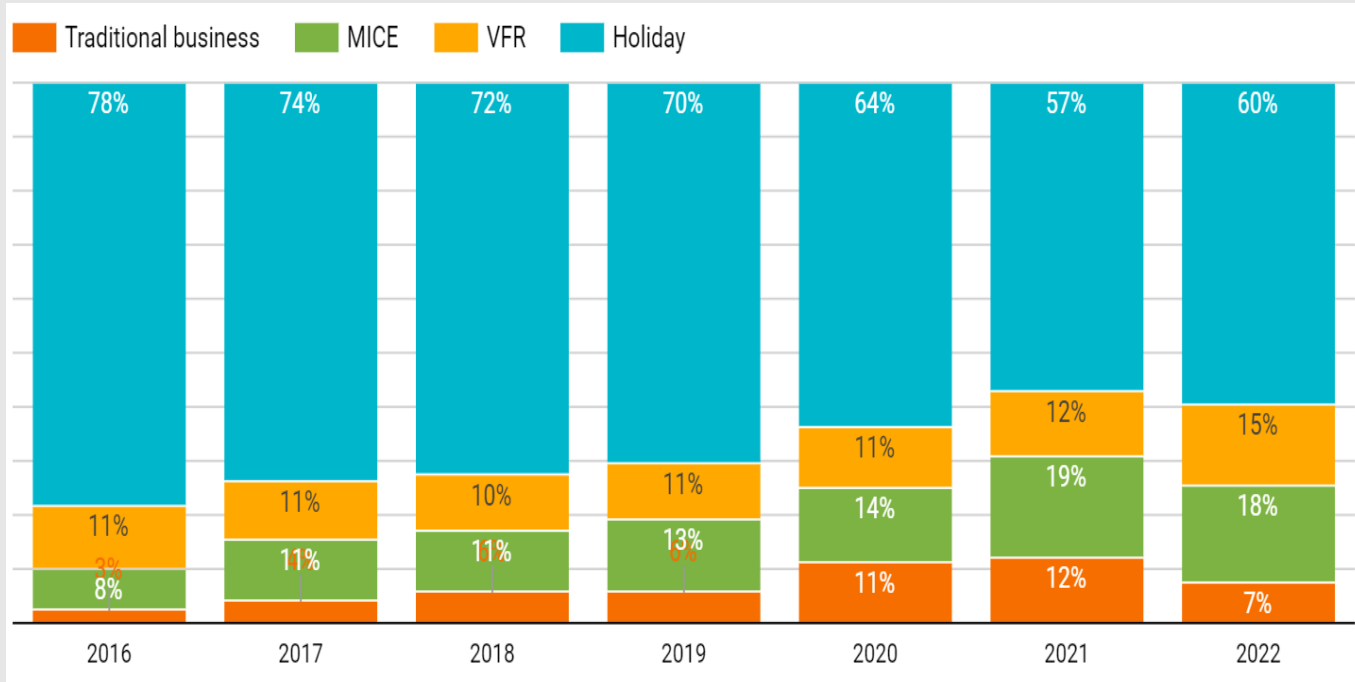


British trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2016-2022



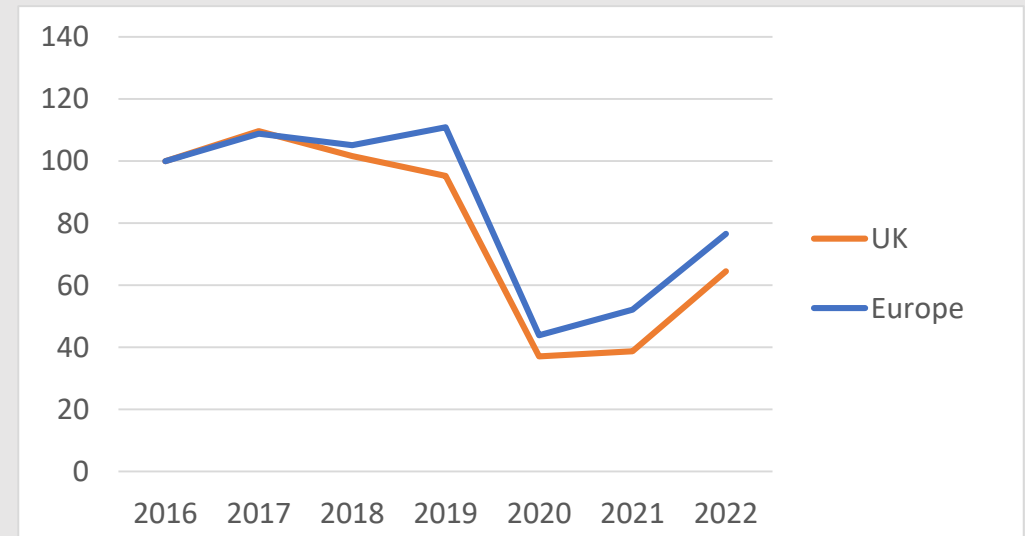
British trips to Luxembourg, 2016-2022



2022

| | UK to Luxembourg | Ireland to Luxembourg | Europe to Luxembourg |
|----------------------|------------------|-----------------------|----------------------|
| Holiday | 60% | 50% | 63% |
| VFR | 15% | 13% | 17% |
| MICE | 18% | 13% | 12% |
| Traditional Business | 7% | 25% | 8% |

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

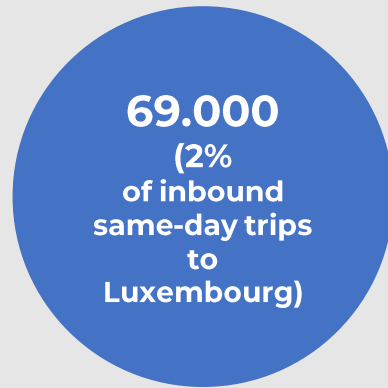


British & Irish same-day trips to Luxembourg

2022

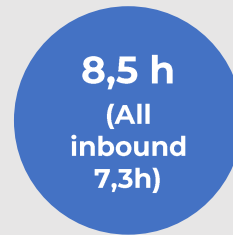


Number of British same-day trips to Luxembourg

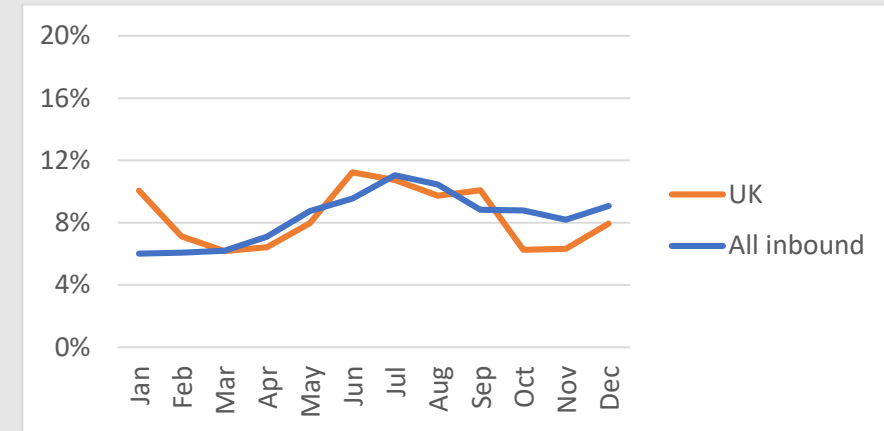


-27% (vs. 2021)

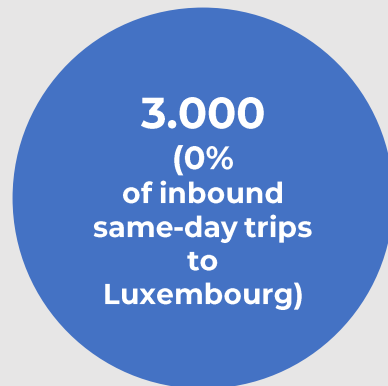
Average length of UK same-day trips



Seasonality of UK same-day trips, % monthly share

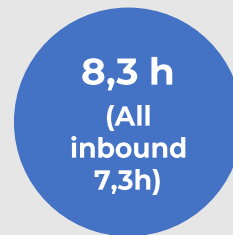


Number of Irish same-day trips to Luxembourg

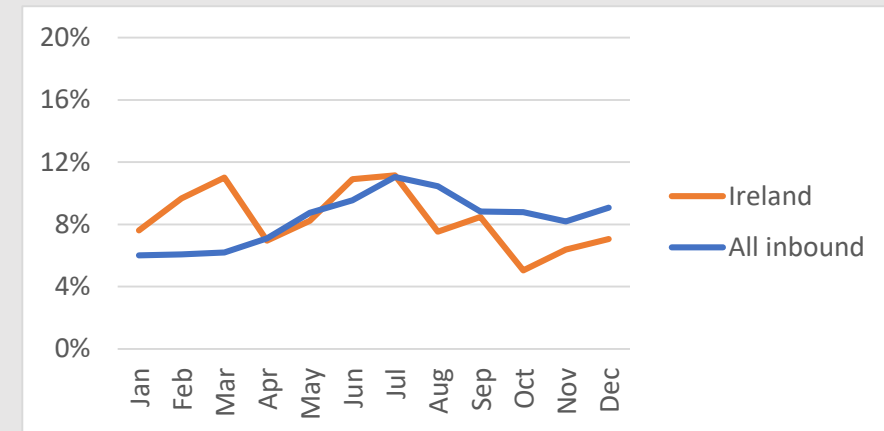


+165% (vs. 2021)

Average length of Irish same-day trips



Seasonality of Irish same-day trips, % monthly share





Travel behaviour of British leisure visitors in Luxembourg

Holiday types

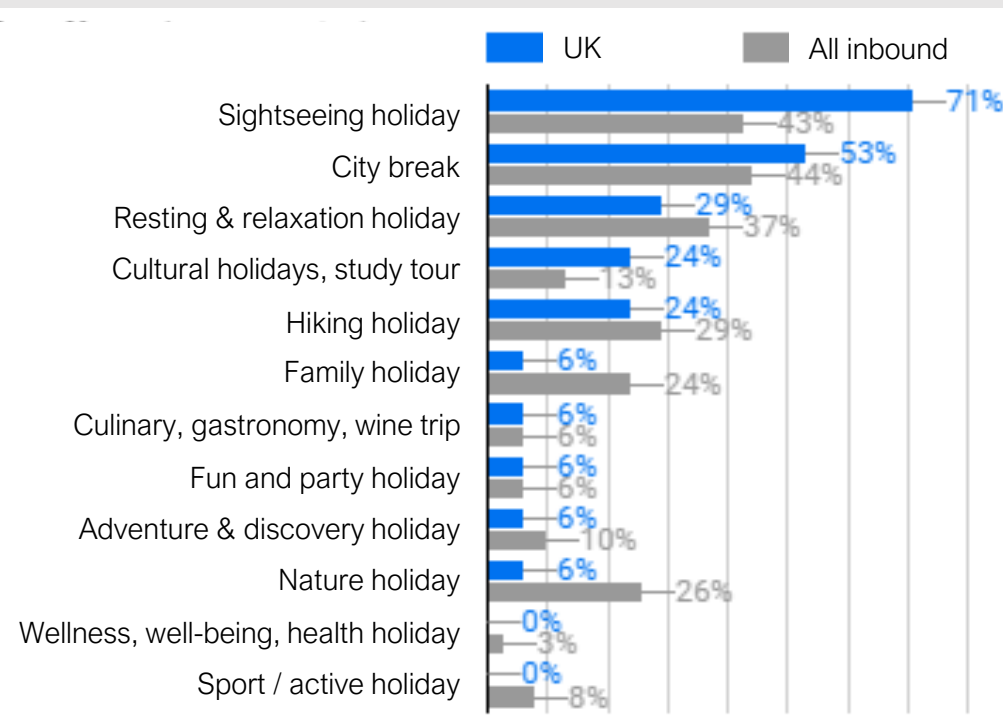
Inbound leisure visitors with overnight, 2020-2022



Main holiday types

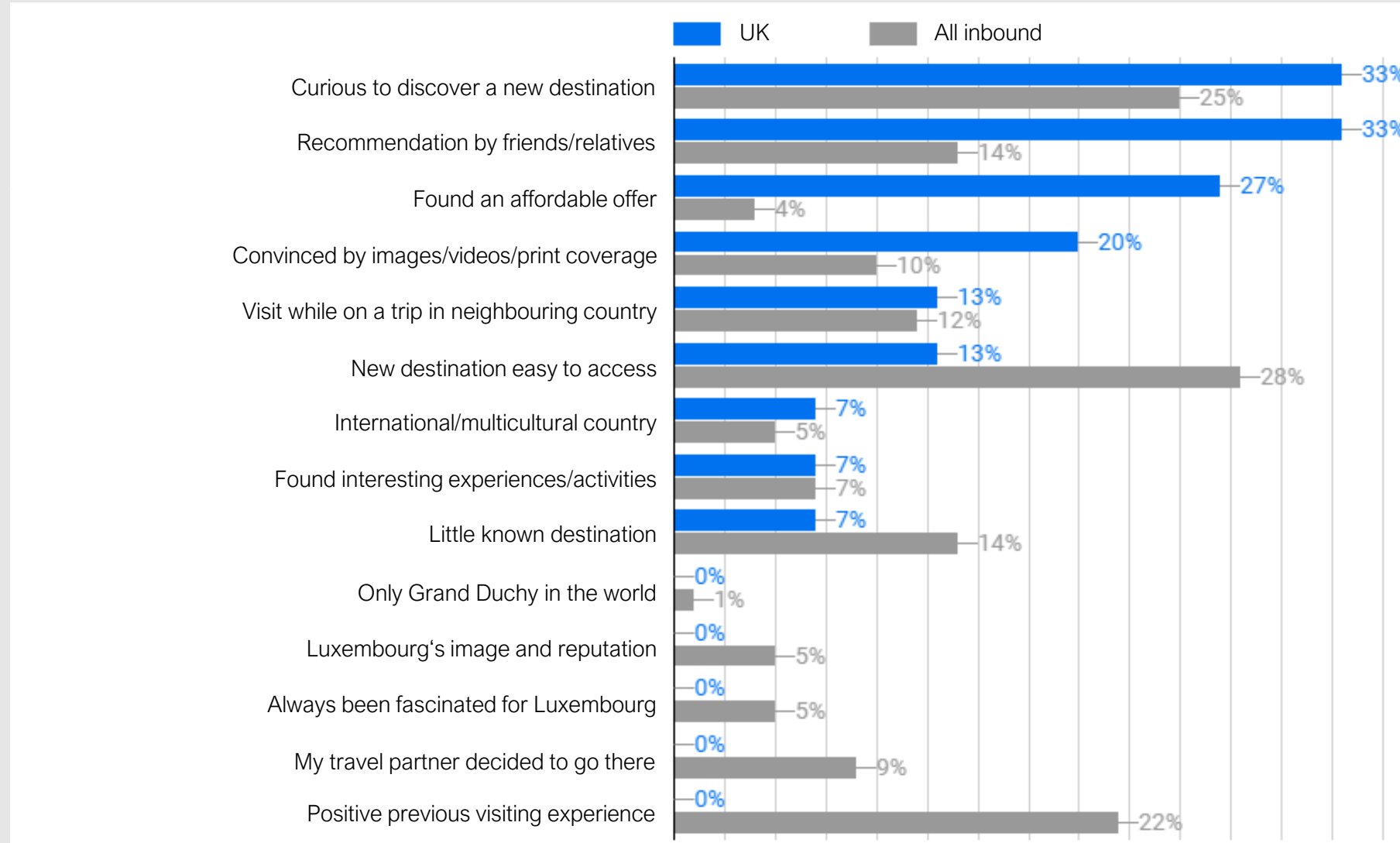


Additional holiday types



Key decision criteria for choosing Luxembourg

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

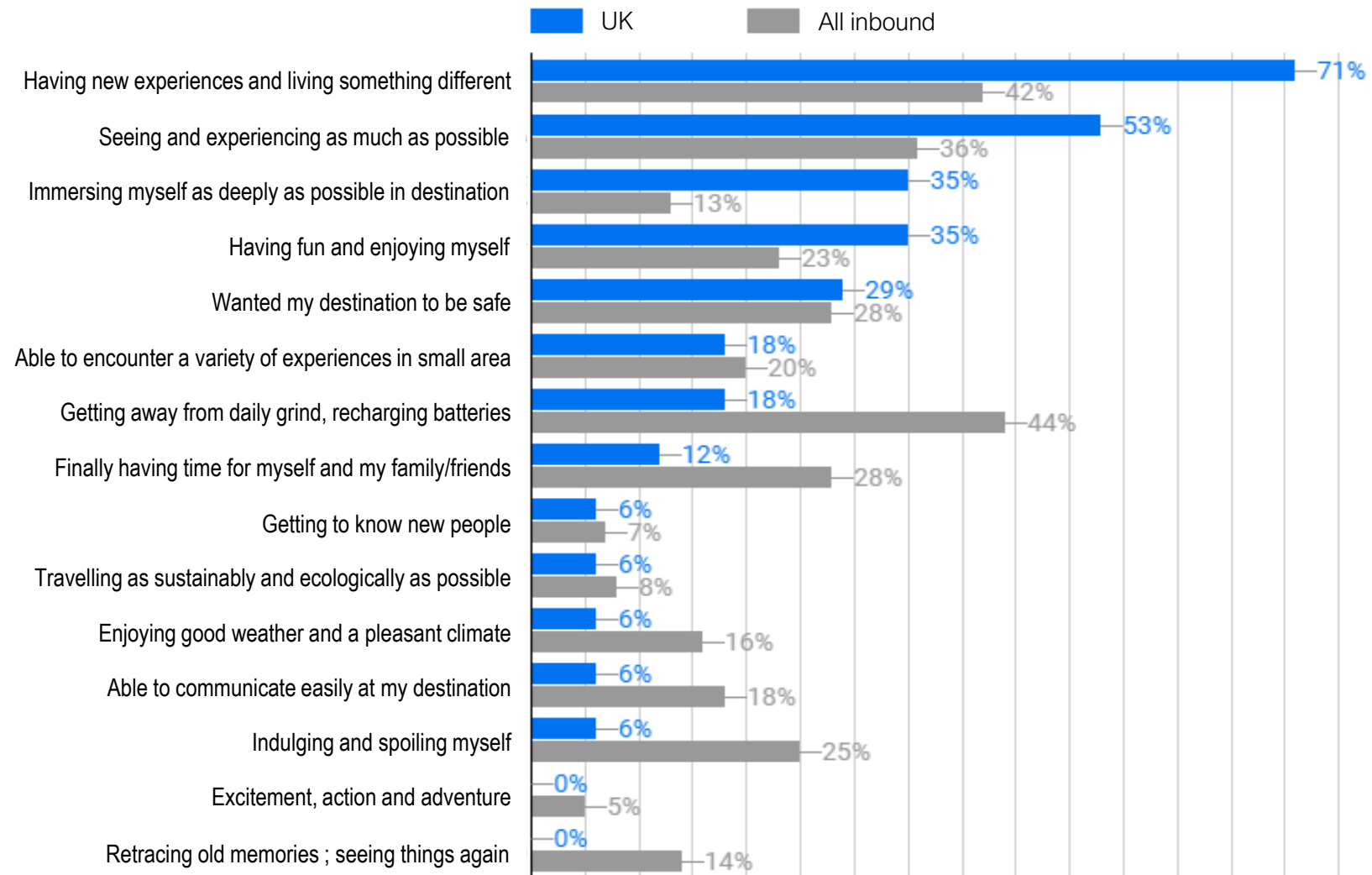


Source: LFT/Ilres Visitor Survey, 2020-2022.

(*) Maximum 3 answers possible.

Key travel motivations

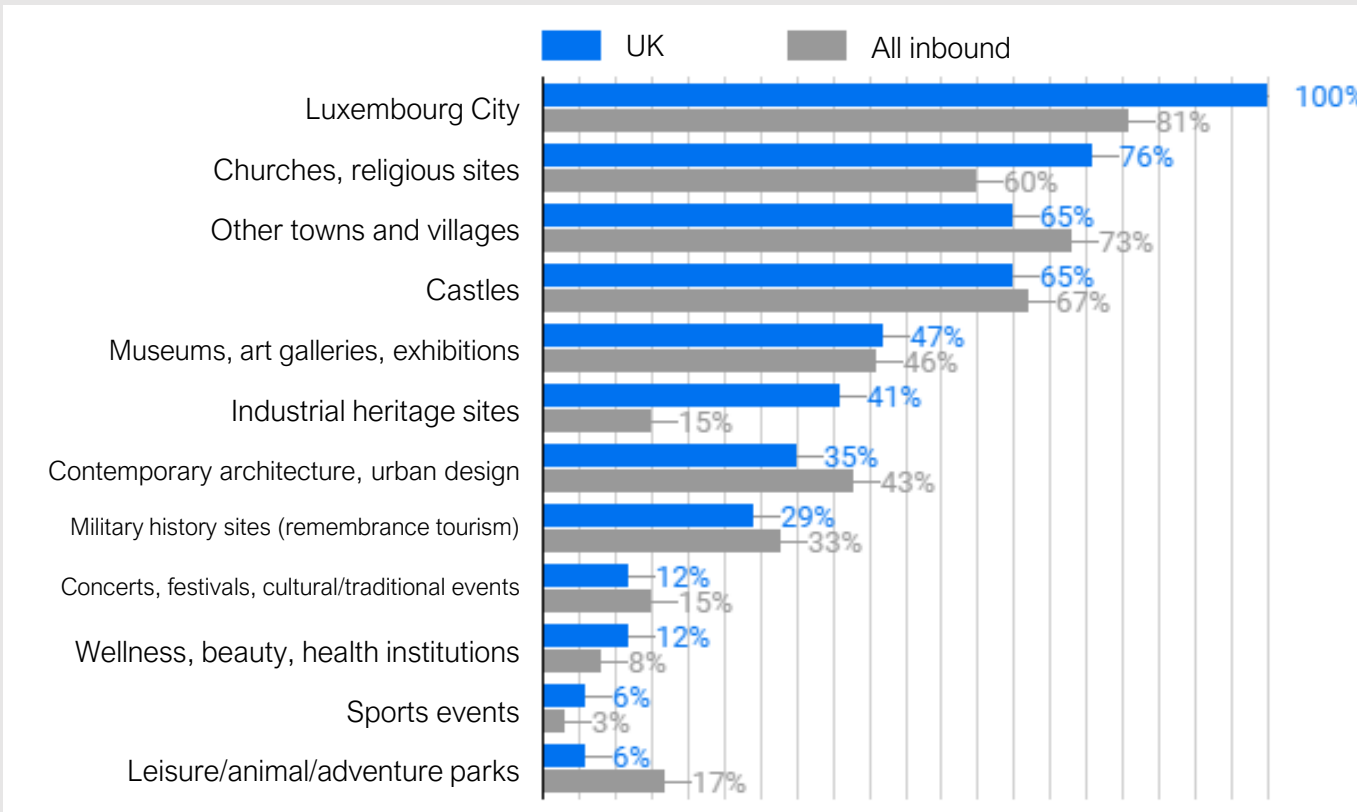
Inbound leisure visitors with overnight, 2020-2022



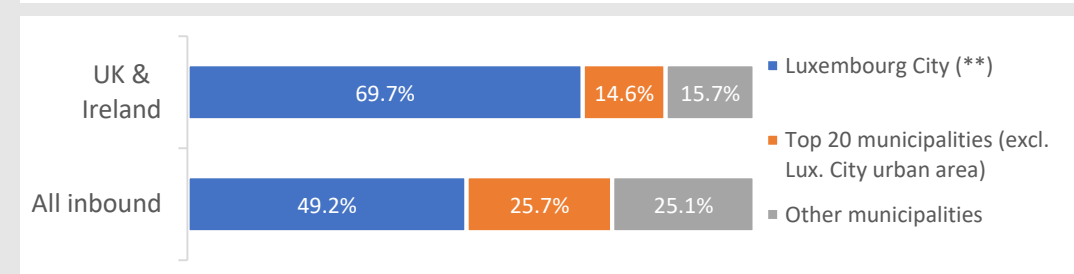
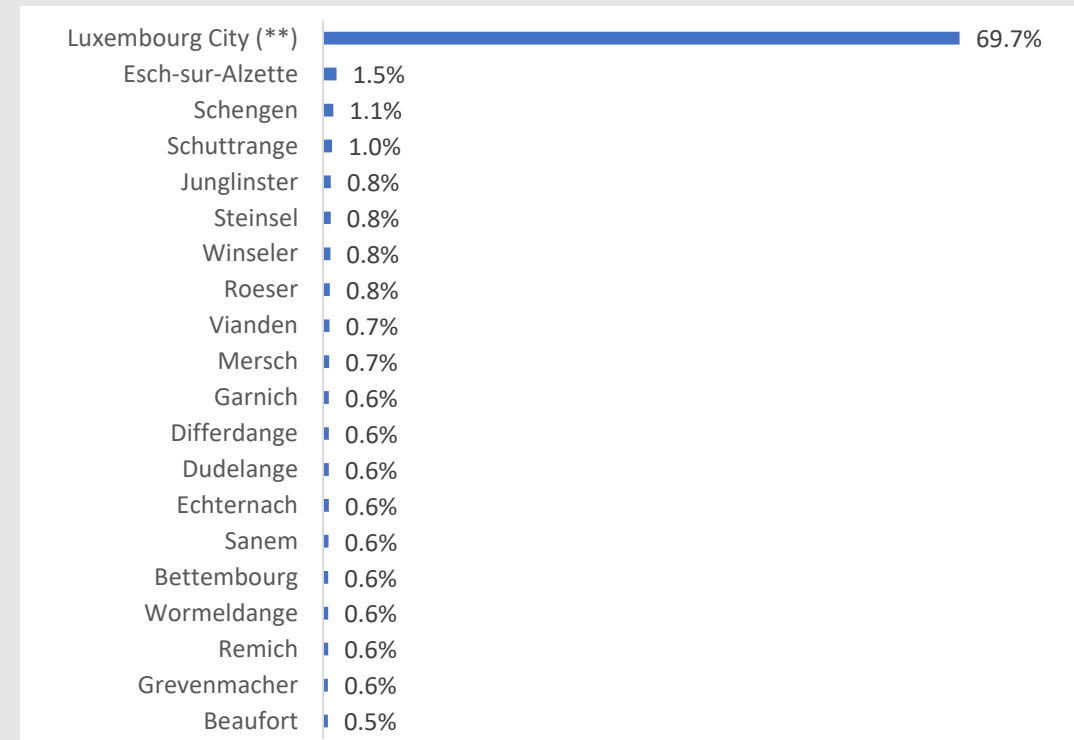
Type of places and cities visited in Luxembourg



Places visited during leisure overnight stays¹



Top cities visited during British & Irish 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.

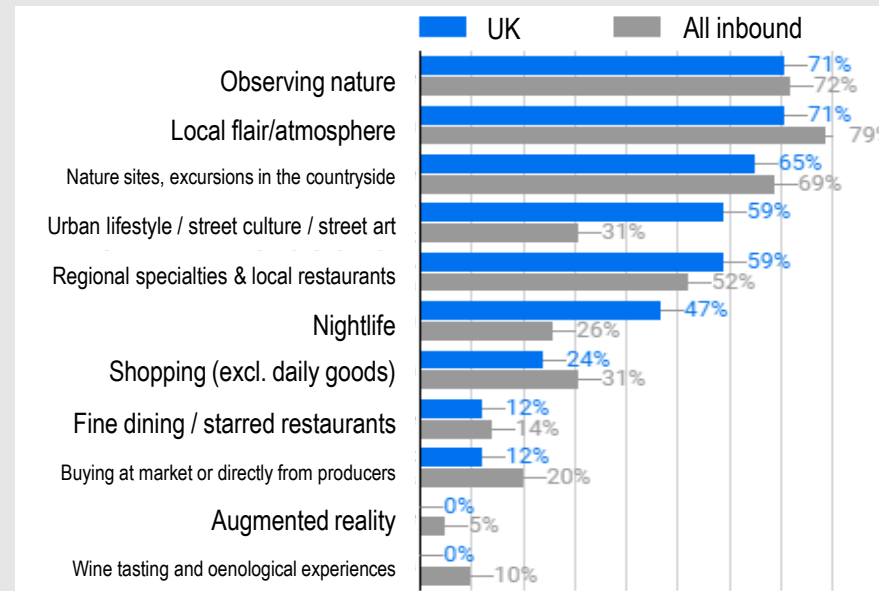
(**) Urban area, incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange).

Activities undertaken in Luxembourg

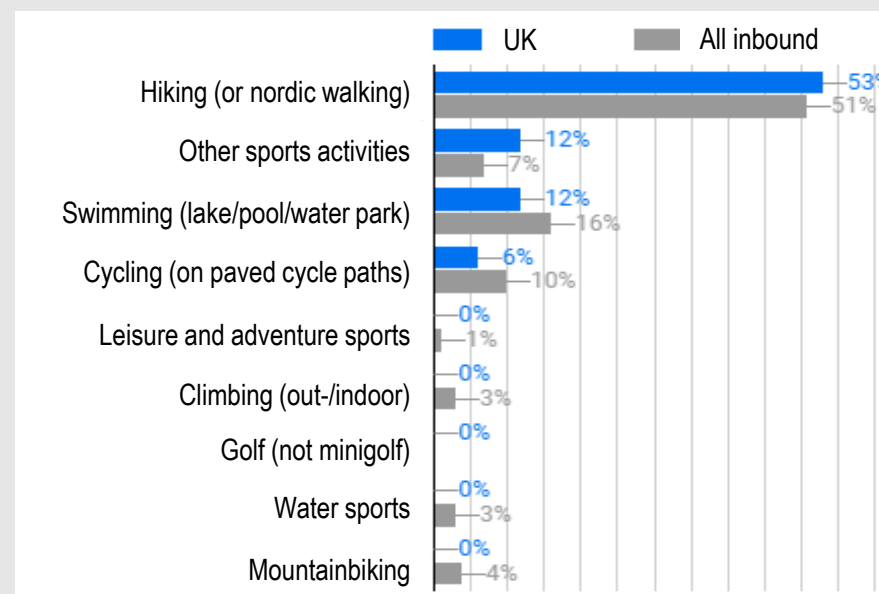
Inbound leisure visitors with overnight, 2020-2022



Non-sporting activities



Sporting activities

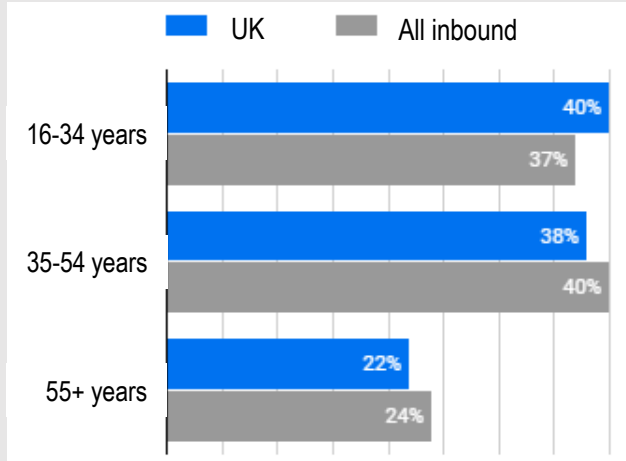


Transport, travel party, age, repeat visits and cross-border trips

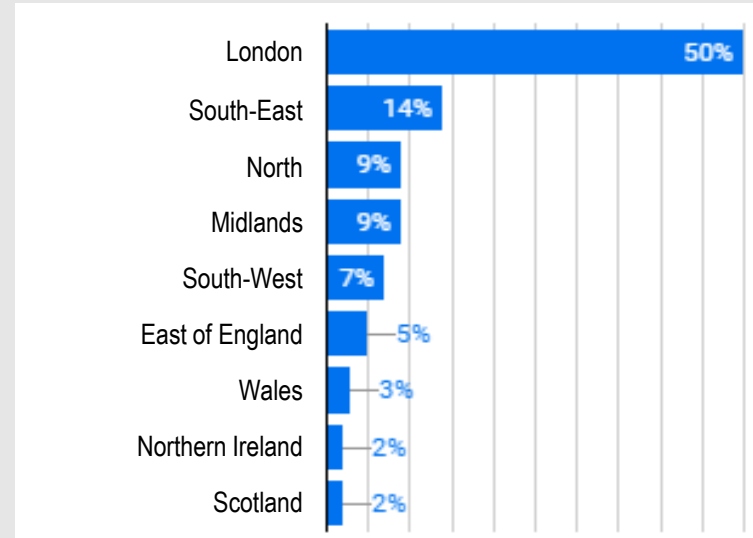
Inbound leisure visitors with overnight, 2020-2022



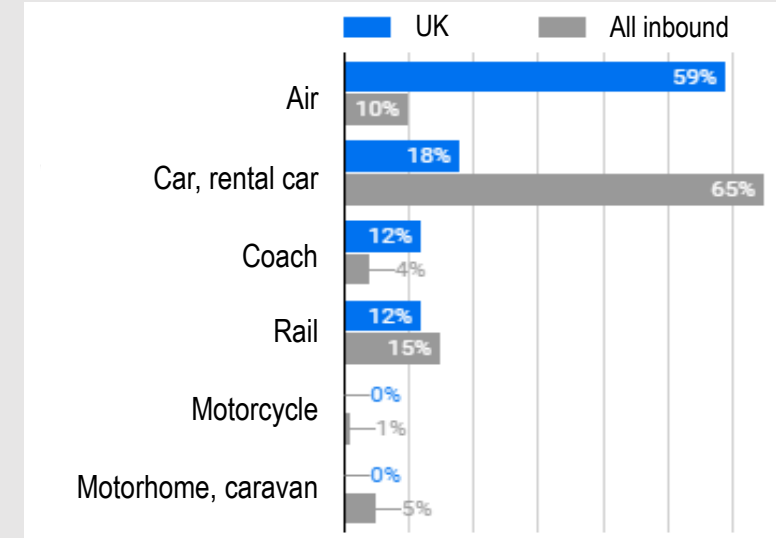
Age groups



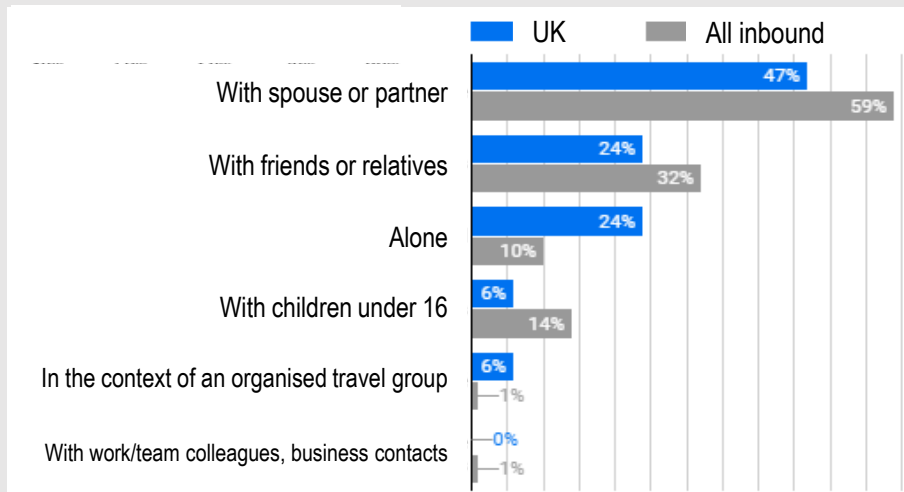
Region of origin



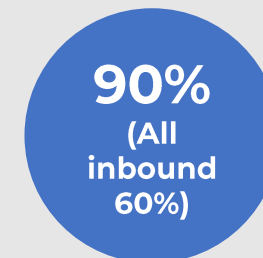
Mode of transport to access Luxembourg



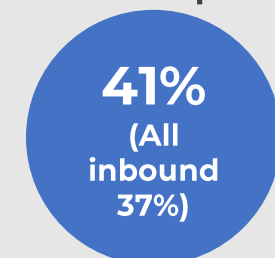
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

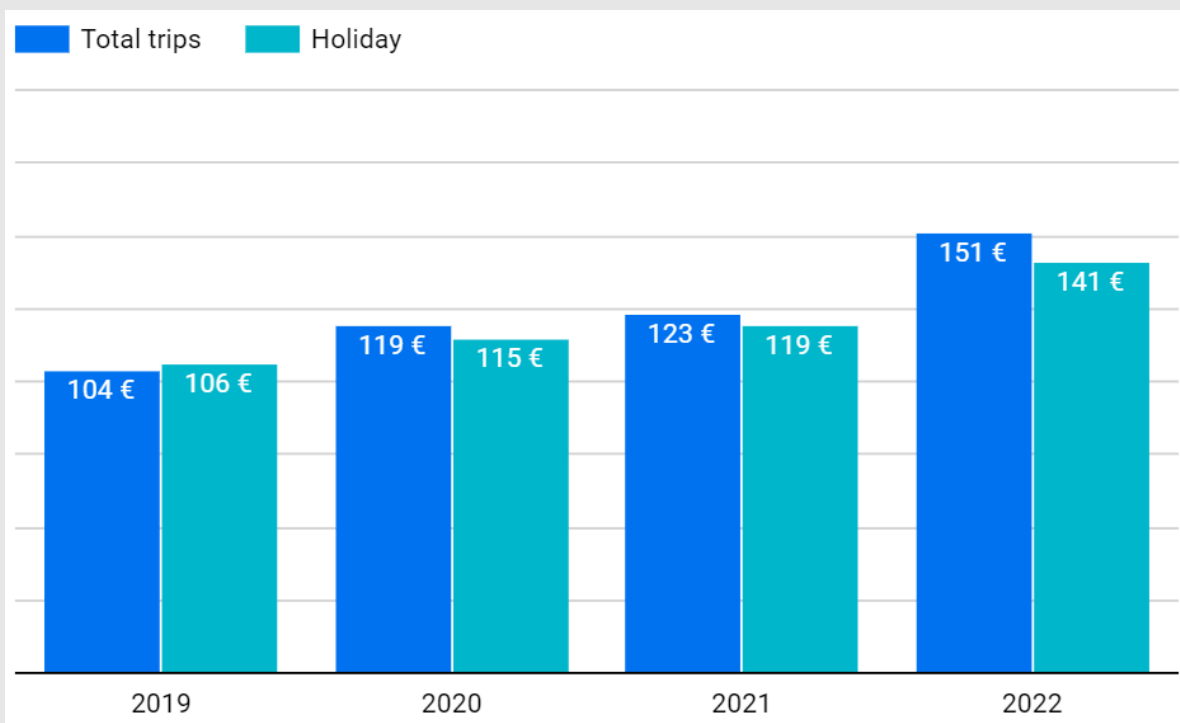


Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

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

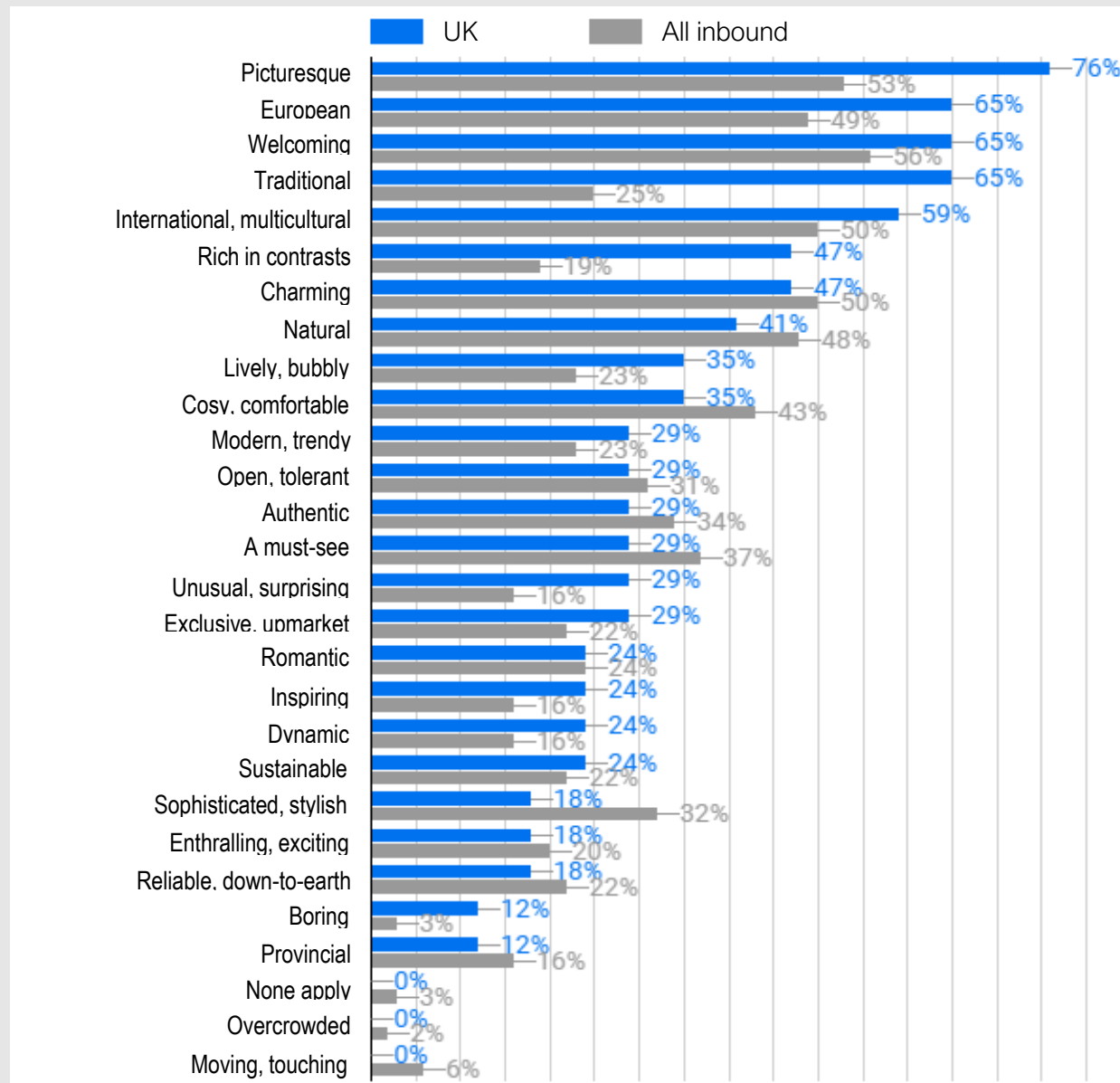


2022

| | UK to Luxembourg | Europe to Luxembourg |
|---|------------------|----------------------|
| Spend/day/pers. on all trips | 151 € | 124 € |
| Spend/day/pers. on holiday trips | 141 € | 118 € |

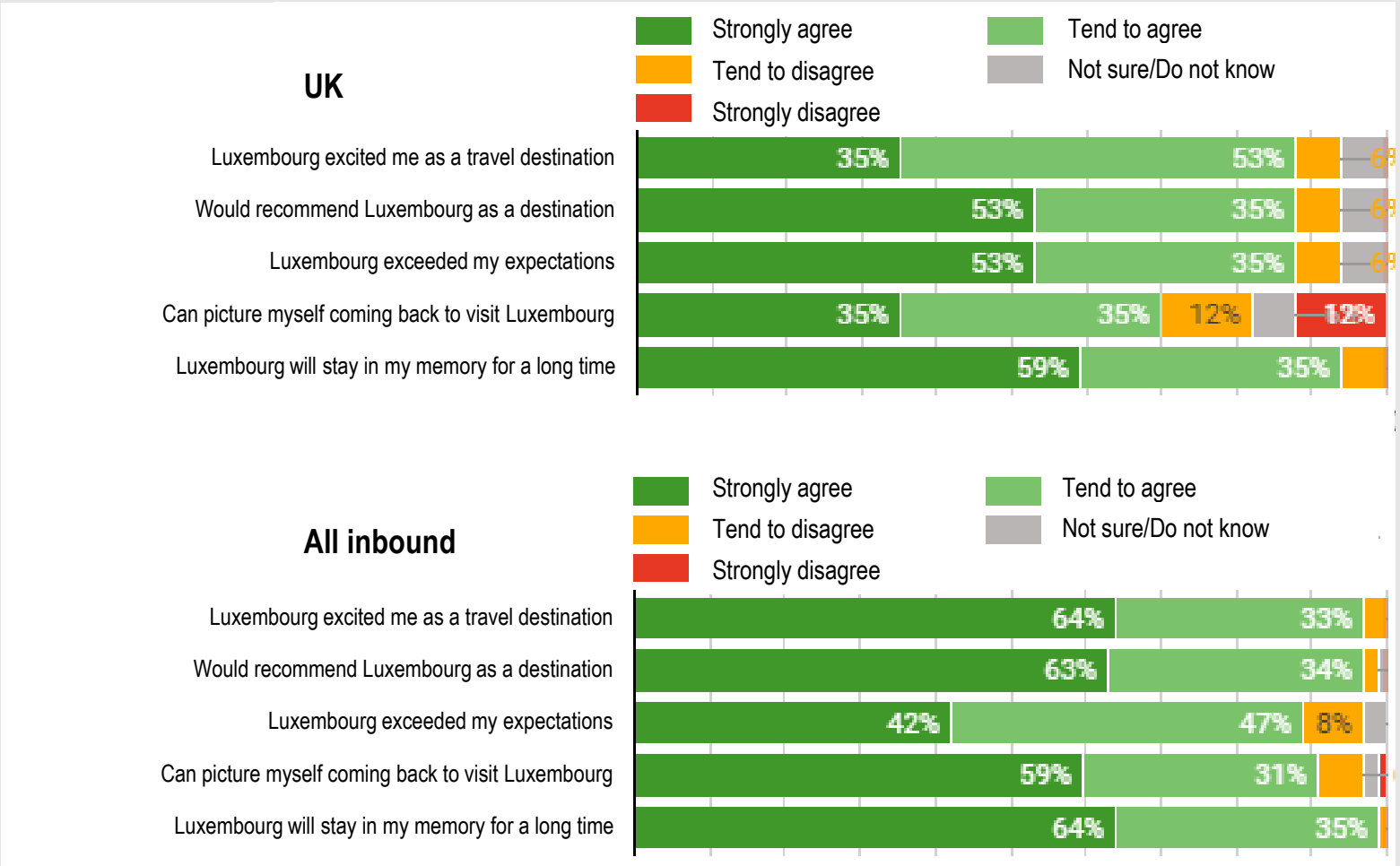
Image perception of Luxembourg

Leisure overnight visitors



Visitor satisfaction and recommendation

Inbound leisure visitors, 2020-2022

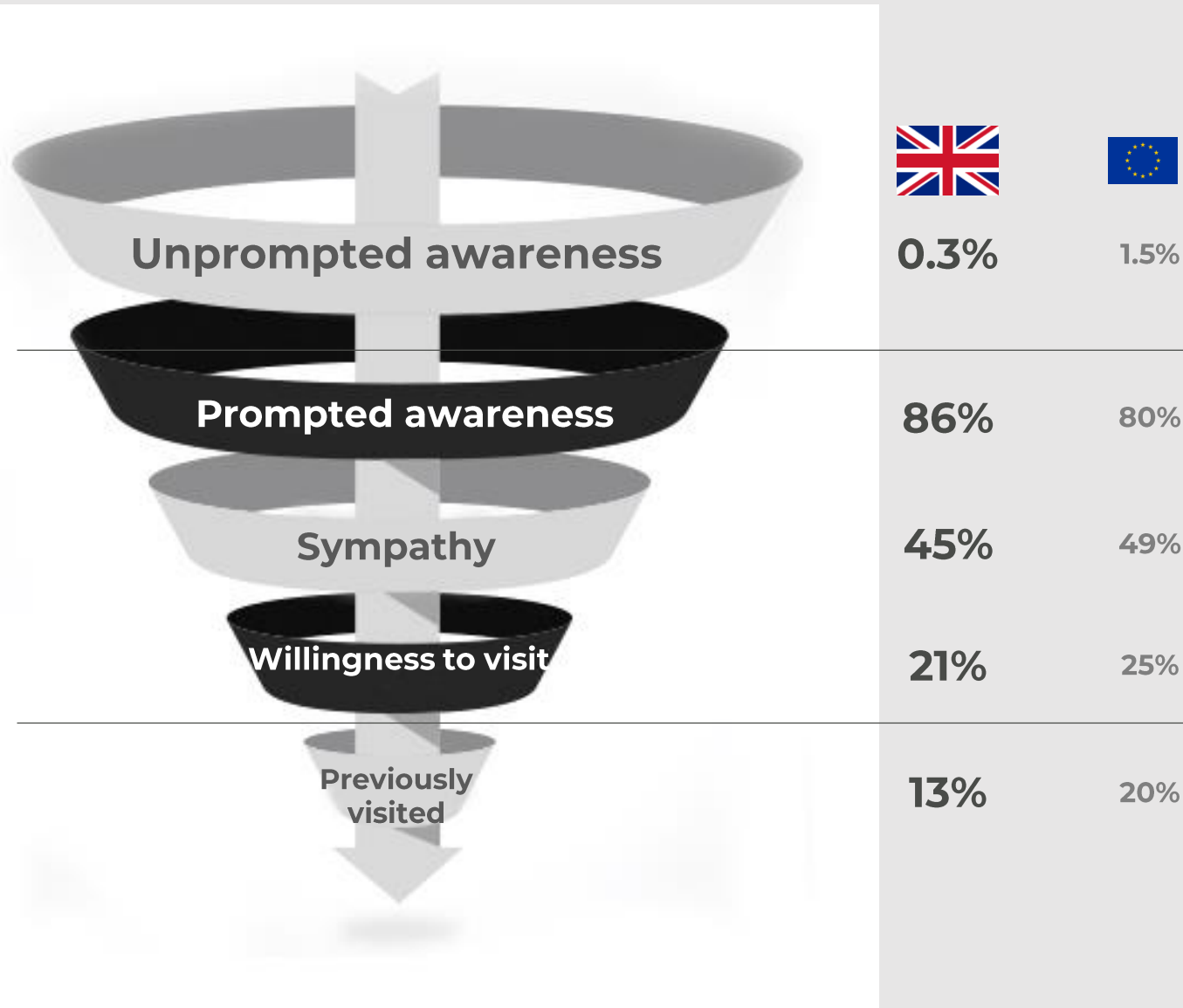




Target segments, Brand & Growth Potential

Brand Funnel 2021-2022

Assessing Luxembourg's brand strength as a destination



Total future visitor potential from the UK (*)

10.4 million

Highest future travel intent from the UK (**)

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

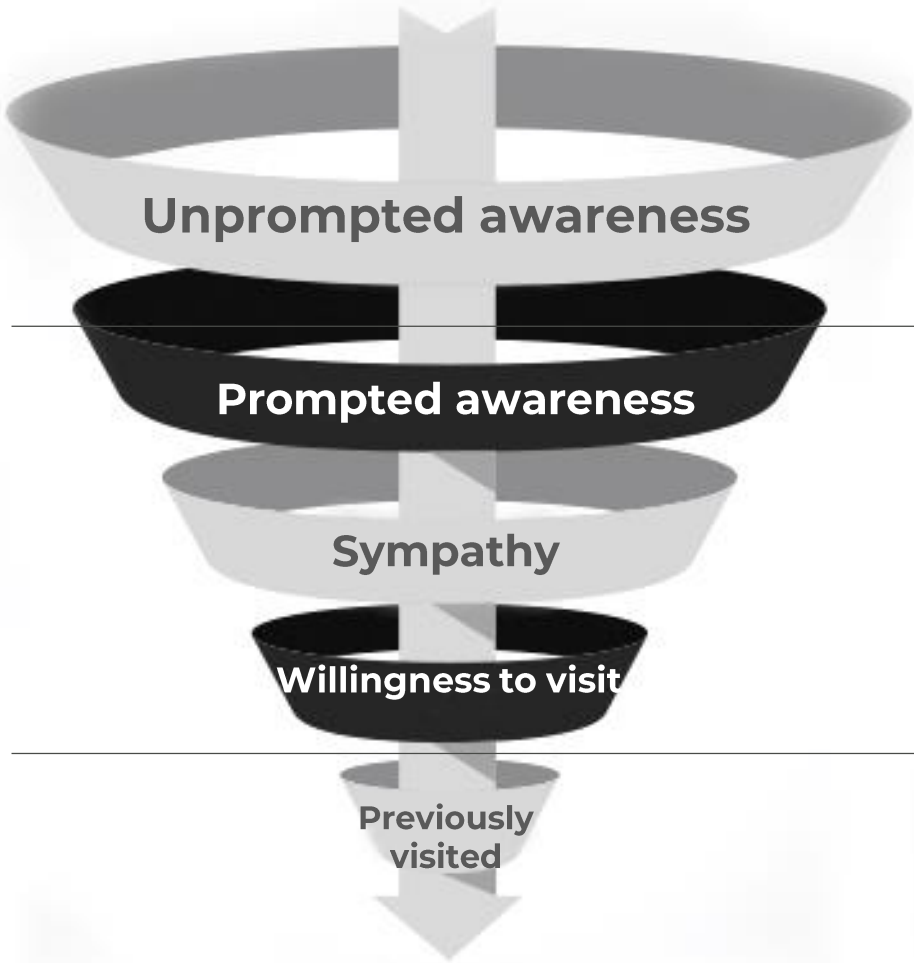
Source: Destination Brand/Inspektour.



(*) Based on travel intent for next 3 years.

(**) Based on relative shares of travel intent for next 3 years.

Brand Funnel 2021-2023

Assessing Luxembourg's brand strength as a destination



| |  |  |
|----------------------|---|---|
| Unprompted awareness | (*) | 1.5% |
| Prompted awareness | 91% | 80% |
| Sympathy | 53% | 49% |
| Willingness to visit | 26% | 25% |
| Previously visited | 9% | 20% |

Total future visitor potential from Ireland (**)

1.0 million

Highest future travel intent from Ireland (***)

1. Perfection Seekers
2. Explorers
3. Nature-Loving Actives

Source: LFT.

(*) Not compiled in Ireland.

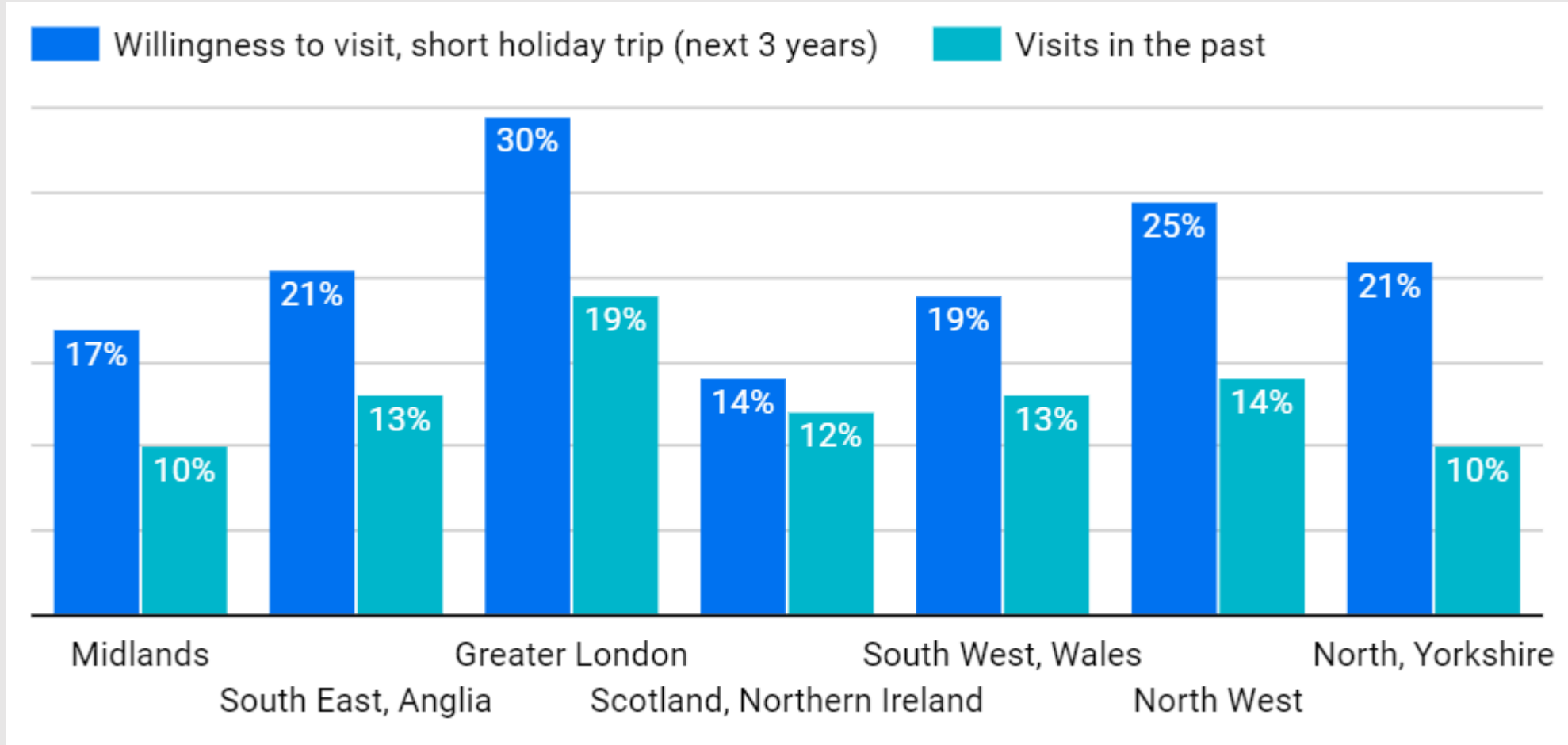
(**) Based on travel intent for next 3 years.

(***) Based on relative shares of travel intent for next 3 years.



Regional origin 2021-2022

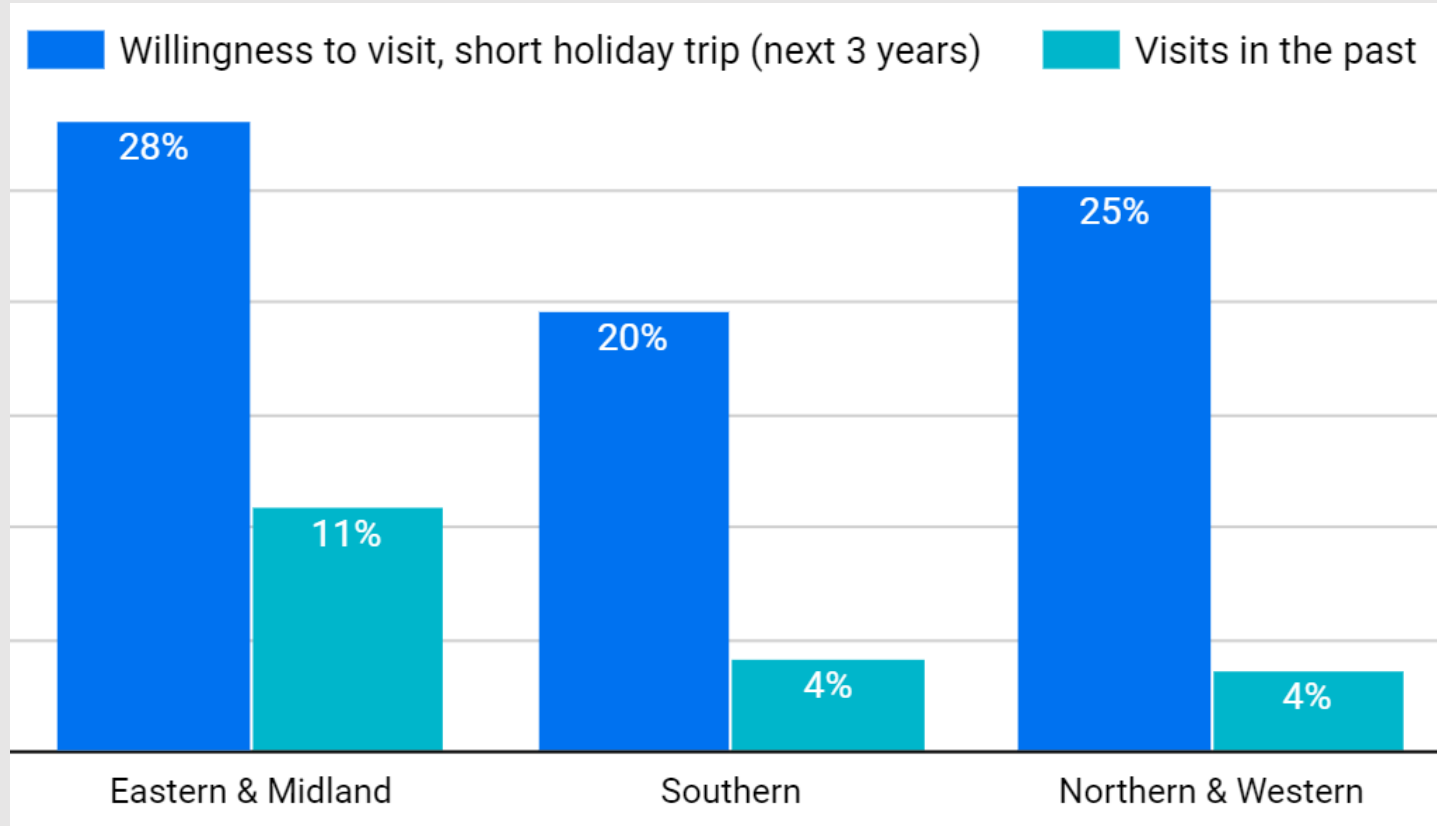
Past visitors and future potential








Regional origin 2021-2022

Past visitors and future potential



General theme interest (*)






| Theme |  |  |  |
|----------------------------|---|---|---|
| | Rank | Rank | % interested |
| Resting/Relaxation | 1 | 1 | 70% |
| Nature | 3 | 2 | 66% |
| City | 4 | 3 | 65% |
| Culinary | 2 | 4 | 56% |
| Castles | 5 | 5 | 54% |
| Culture | 6 | 6 | 53% |
| History/Unesco | 7 | 7 | 45% |
| Shopping | 10 | 8 | 44% |
| Nightlife (**) | 12 | 9 | 43% |
| Countryside | 15 | 10 | 40% |
| Industrial heritage | 19 | 11 | 40% |
| Luxury | 17 | 12 | 37% |
| Family | 11 | 13 | 36% |
| Events | 14 | 14 | 34% |
| Wine | 16 | 15 | 34% |
| Sustainability | 9 | 16 | 33% |
| Hiking | 8 | 17 | 31% |
| Active-sports | 18 | 18 | 31% |
| Wellness | 13 | 19 | 28% |
| Camping | 20 | 20 | 28% |
| Cycling | 21 | 21 | 24% |
| MTB | 22 | 22 | 18% |
| 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).

General theme interest (*)






| Theme |  |  |  |
|---------------------|---|---|---|
| | Rank | Rank | % interested |
| Resting/Relaxation | 1 | 1 | 67% |
| Culinary | 2 | 2 | 65% |
| City | 4 | 3 | 63% |
| Nature | 3 | 4 | 61% |
| Family | 11 | 5 | 58% |
| Sustainability | 9 | 6 | 58% |
| Luxury | 17 | 7 | 54% |
| Culture | 6 | 8 | 54% |
| History/Unesco | 7 | 9 | 53% |
| Events | 14 | 10 | 53% |
| Castles | 5 | 11 | 53% |
| Nightlife (**) | 12 | 12 | 51% |
| Shopping | 10 | 13 | 48% |
| Wine | 16 | 14 | 47% |
| Wellness | 13 | 15 | 47% |
| Countryside | 15 | 16 | 45% |
| Active-sports | 18 | 17 | 42% |
| Industrial heritage | 19 | 18 | 39% |
| Hiking | 8 | 19 | 37% |
| Camping | 20 | 20 | 36% |
| Cycling | 21 | 21 | 31% |
| MTB | 22 | 22 | 23% |
| Motorcycling | 23 | 23 | 21% |

(*) 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 | 47% |
| City | 1 | 2 | 44% |
| Resting/Relaxation | 2 | 3 | 40% |
| Shopping | 5 | 4 | 34% |
| Culture | 4 | 5 | 34% |
| Nightlife (***) | 11 | 6 | 30% |
| Culinary | 6 | 7 | 28% |
| Nature | 7 | 8 | 27% |
| Hiking | 10 | 9 | 26% |
| Industrial Heritage | 19 | 10 | 25% |
| Cycling | 13 | 11 | 24% |
| Countryside | 17 | 12 | 23% |
| History/Unesco | 8 | 13 | 22% |
| Camping | 15 | 14 | 21% |
| Sustainability | 12 | 15 | 21% |
| Wine | 16 | 16 | 21% |
| Wellness | 9 | 17 | 20% |
| Family | 14 | 18 | 19% |
| MTB | 20 | 19 | 18% |
| Active-sports | 18 | 20 | 18% |

Growth potential for themes (**)

- Culinary & Wine
- History/Unesco
- Nature
- Countryside

(*) 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 Theme Competence (*)



| Theme |  |  |  |
|---------------------|---|---|---|
| | Rank | Rank | % agreeing |
| City | 1 | 1 | 51% |
| Resting/Relaxation | 2 | 2 | 48% |
| Culinary | 6 | 3 | 48% |
| Culture | 4 | 4 | 45% |
| Shopping | 5 | 5 | 43% |
| History/Unesco | 8 | 6 | 42% |
| Nightlife | 11 | 7 | 40% |
| Nature | 7 | 8 | 39% |
| Castles | 3 | 9 | 38% |
| Family | 14 | 10 | 37% |
| Sustainability | 12 | 11 | 37% |
| Wellness | 9 | 12 | 35% |
| Wine | 16 | 13 | 33% |
| Countryside | 17 | 14 | 32% |
| Active-sports | 18 | 15 | 31% |
| Cycling | 13 | 16 | 30% |
| Industrial Heritage | 19 | 17 | 29% |
| Camping | 15 | 18 | 29% |
| Hiking | 10 | 19 | 26% |
| MTB | 20 | 20 | 23% |

Growth potential for themes (**)

- Culinary & Wine
- Nature
- Hiking
- 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 |
| Attractive, appealing | 4 | 1 | 36% |
| Authentic | 1 | 2 | 31% |
| Welcoming, hospitable | 2 | 3 | 30% |
| Open-minded, tolerant | 3 | 4 | 29% |
| Surprising | 5 | 5 | 25% |
| Not crowded, insider tip | 8 | 6 | 24% |
| Service-oriented | 7 | 7 | 23% |
| Lot of variety, diversified | 6 | 8 | 22% |
| Sustainable | 10 | 9 | 21% |
| Lively, hip | 9 | 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.

Luxembourg's Brand Value Ratings (*)



| Feature |  |  |  |
|-----------------------------|---|---|---|
| | Rank | Rank | % agreeing |
| Of high quality | 2 | 1 | 42% |
| Safe | 1 | 2 | 42% |
| Attractive, appealing | 5 | 3 | 41% |
| Welcoming, hospitable | 4 | 4 | 40% |
| Exclusive, luxurious | 7 | 5 | 38% |
| Authentic | 3 | 6 | 37% |
| Open-minded, tolerant | 8 | 7 | 36% |
| Lively, hip | 12 | 8 | 32% |
| Dynamic, modern | 6 | 9 | 32% |
| Lot of variety, diversified | 10 | 10 | 31% |
| Service-oriented | 11 | 11 | 29% |
| Surprising | 9 | 12 | 28% |
| Not crowded, insider tip | 13 | 13 | 27% |
| Sustainable | 14 | 14 | 25% |

(*) 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 |
| 2 | Image | Image: PS, NLA. Activating: EXP . |

Theme & segment focus

| Theme | Priority | Marketing | Segments |
|---------------------|----------|--------------------|----------------|
| City | 1 | Image | EXP, PS |
| Nature | 2 | Image | PS, (EXP) |
| Culinary | 3 | Activating | PS, EXP |
| Wine | 2 | Image | PS, EXP |
| Culture | 2 | Image & Activating | EXP, PS |
| Industrial Heritage | 4 | Image | EXP, NLA, (PS) |
| Hiking | 3 | Activating | NLA |
| Castles | 3 | Activating | EXP, (NLA) |
| Countryside | 4 | Image | EXP, PS |
| Camping | 4 | Image | EXP |

Brand Value focus

| Theme | Priority | Segments |
|-------------------------|----------|-----------|
| Lot of variety | 1 | PS EXP |
| Not crowded/insider tip | 1 | |
| Lively/hip | 2 | |
| Open-minded | 2 | |



LFT strategic market focus

Market prioritisation



| Market Priority | Main Objective | Target Segment focus (in decreasing order of importance within category) |
|-----------------|----------------|---|
| | | Bold : main focus |
| 4 | Image | Image: EXP . Activating: PS, NLA. |

Theme & segment focus

| Theme | Priority | Marketing | Segments |
|-------------|----------|------------|----------|
| City | 1 | Activating | PS, EXP |
| Nature | 2 | Image | EXP, NLA |
| Culinary | 1 | Image | EXP |
| Castles | 2 | Image | PS |
| Countryside | 3 | Image | EXP |
| Wellness | 3 | Activating | NLA, PS |

Brand Value focus

| Theme | Priority | Segments |
|-------------------------|----------|-------------|
| Not crowded/insider tip | 1 | PS (EXP) |
| Sustainable | 2 | |
| Lot of variety | 3 | |



Your contact



Alain Krier

Head of Insights & Strategy

T. +352 42 82 82 36

alain.krier@LfT.lu



Luxembourg for Tourism GIE
6, rue Antoine de Saint-Exupéry
L-1432 Luxembourg-Kirchberg
www.visitluxembourg.com