



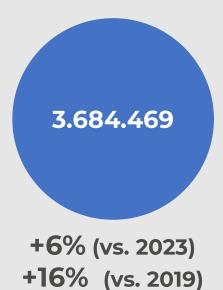
Arrivals & nights in paid accommodation

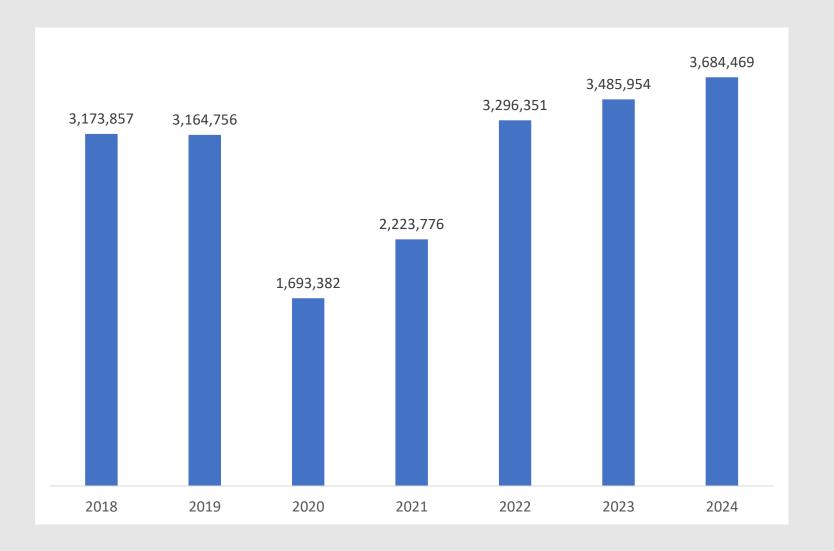
Nights in paid accommodation

2024 and 2018-2024







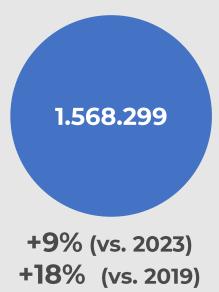


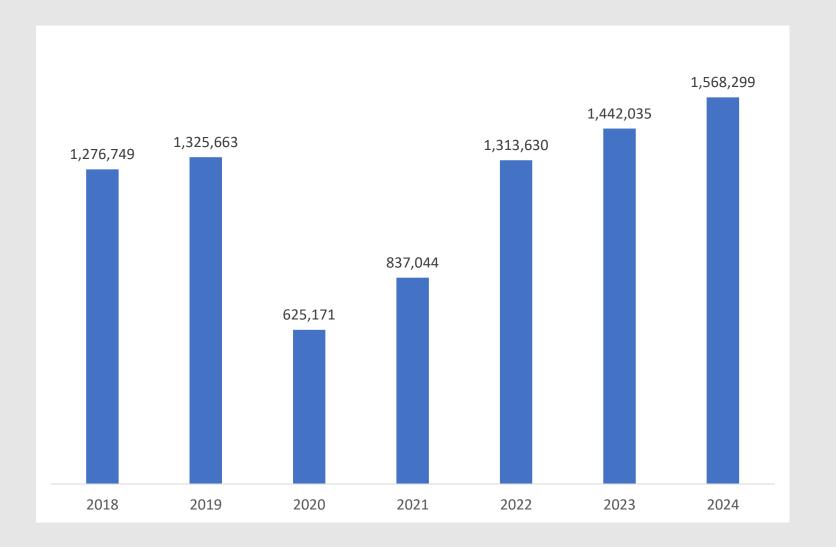
Arrivals in paid accommodation

2024 and 2018-2024









Length of stay, paid accommodation



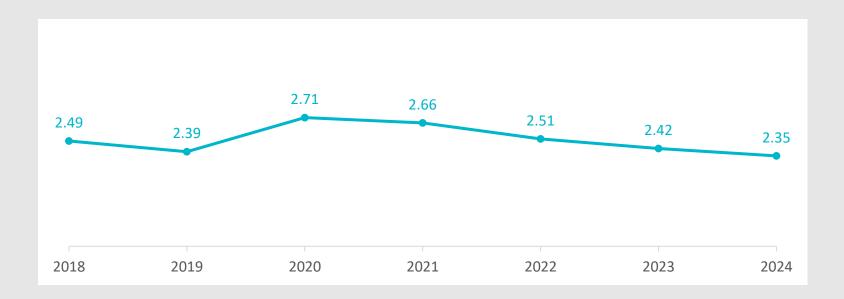






-0.07 nights (vs. 2023)

-0.04 nights (vs. 2019)

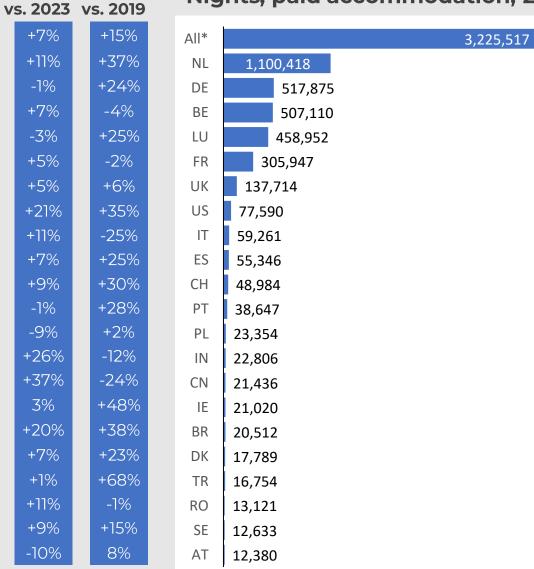


Nights & arrivals in paid accommodation

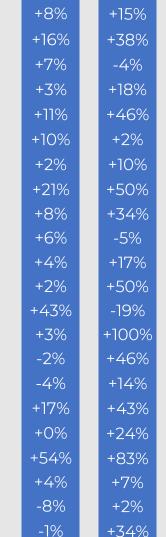


Countries of origin, 2024

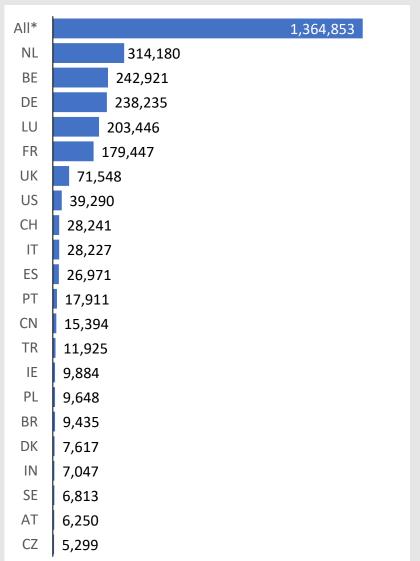
Nights, paid accommodation, 2024



vs. 2023 vs. 2019



Arrivals, paid accommodation, 2024



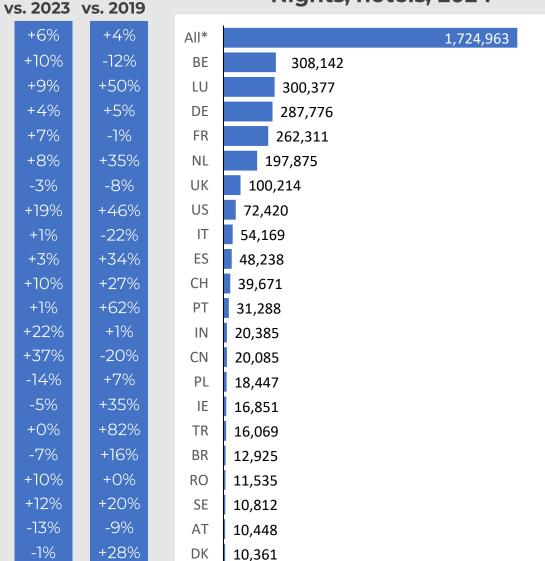
(*) all inbound.

Nights & arrivals in hotels

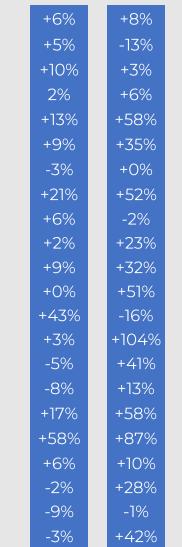
Countries of origin, 2024



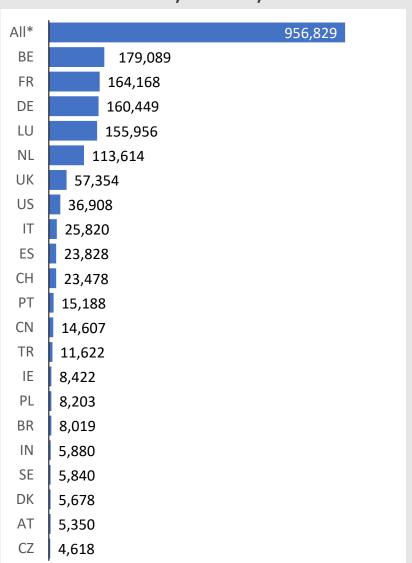
Nights, hotels, 2024



vs. 2023 vs. 2019



Arrivals, hotels, 2024



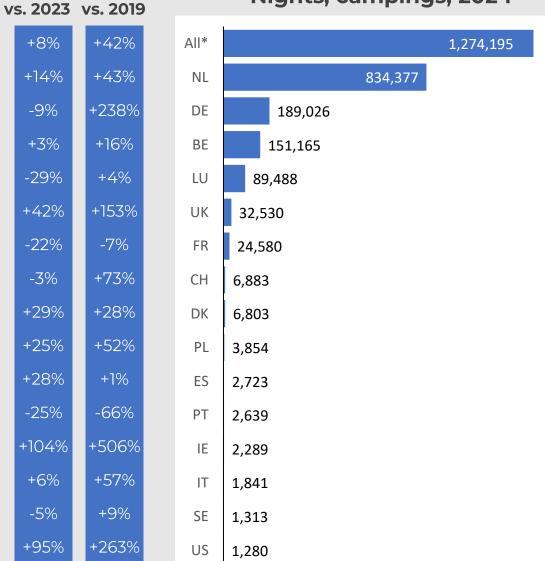
(*) all inbound.

Nights & arrivals in campings

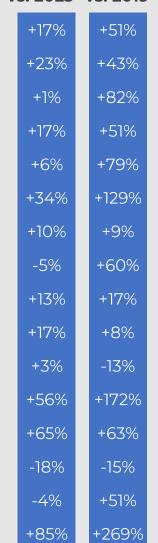




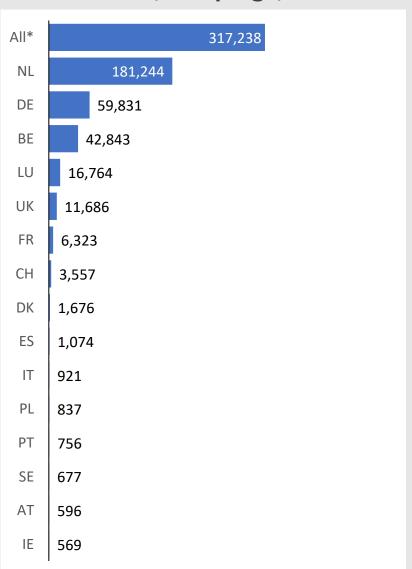
Nights, campings, 2024



vs. 2023 vs. 2019



Arrivals, campings, 2024



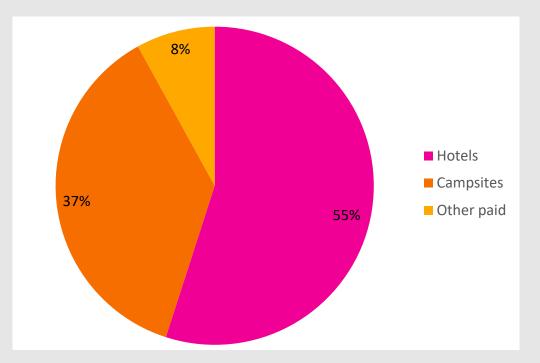
(*) all inbound.

Nights & arrivals in paid accommodation

11

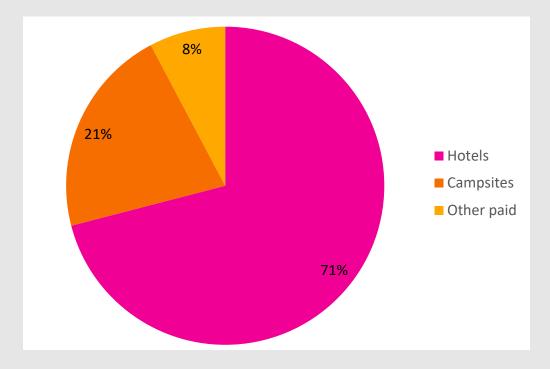
Type of accommodation, 2024

Nights, paid accommodation, 2024



Hotels	2.025.340	+ 7 % (vs. 2023) + 9 % (vs. 2019)
Campsites	1.363.683	+5% (vs. 2023) +39% (vs. 2019)
Other paid accomm.	295.446	+3% (vs. 2023) -10% (vs. 2019)

Arrivals, paid accommodation, 2024



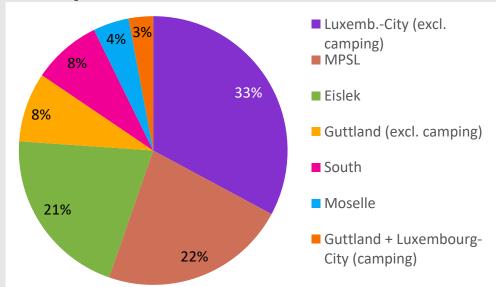
Hotels	1.112.785	+6% (vs. 2023) +13% (vs. 2019)
Campsites	334.002	+16% (vs. 2023) +52% (vs. 2019)
Other paid accomm.	121.512	+7% (vs. 2023) +3% (vs. 2019)

Nights & arrivals in paid accommodation

Regions, 2024

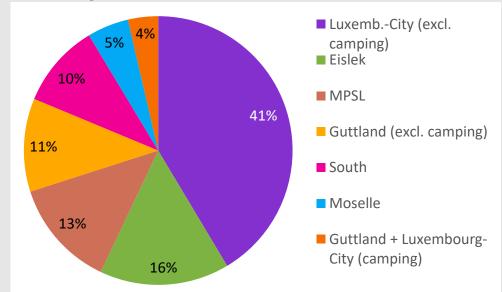


Nights, paid accommodation, 2024



LuxCity (excl. camping)	1.210.194	+9% (vs. 2023) +24% (vs. 2019)
MPSL	828.366	+16% (vs. 2023) +51% (vs. 2019)
Eislek	764.983	-5% (vs. 2023) +9% (vs. 2019)
Guttland (excl. camping)	308.676	+5% (vs. 2023) +11% (vs. 2019)
South	304.566	+2% (vs. 2023) +13% (vs. 2019)
Moselle	159.071	+2% (vs. 2023) -15% (vs. 2019)
Guttland/LuxCity (camping)	108.613	-8% (vs. 2023) +14% (vs. 2019)

Arrivals, paid accommodation, 2024



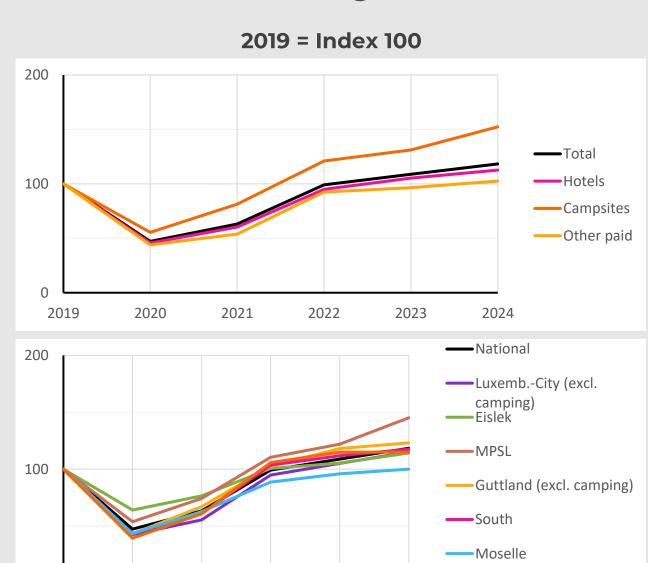
LuxCity (excl. camping)	649.649	+9% (vs. 2023) +15% (vs. 2019)
Eislek	244.948	+8% (vs. 2023) +14% (vs. 2019)
MPSL	204.004	+19% (vs. 2023)+45% (vs. 2019)
Guttland (excl. camping)	176.061	+4% (vs. 2023) +23% (vs. 2019)
South	158.457	+5% (vs. 2023) +18% (vs. 2019)
Moselle	78.292	+4% (vs. 2023) +0% (vs. 2019)
Guttland/LuxCity (camping)	56.888	+0% (vs. 2023) +15% (vs. 2019)
		Source: Stat

Source: Statec

Arrivals in paid accommodation



Type of accommodation & Regions: Trends 2019-2024



2019

2020

2021

2022

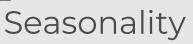
2023

2024

Guttland + Luxembourg-

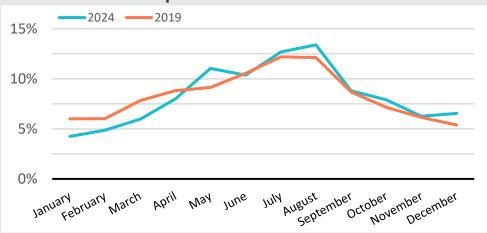
City (camping)

Arrivals in paid accommodation

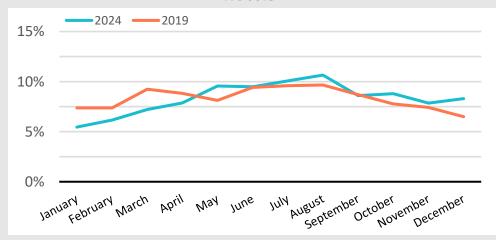




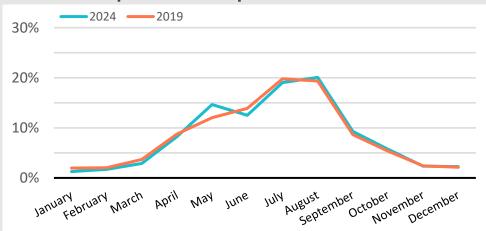




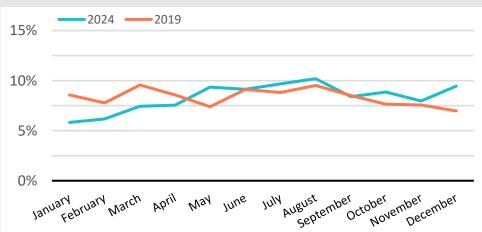
Grand Duchy of Luxembourg, hotels



Grand Duchy of Luxembourg, Campsites & other paid accommodation



Luxembourg City, hotels

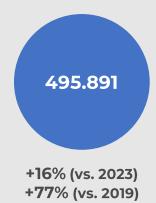


Short-term rentals

2024 and 2018-2024



Nights, Short-term rentals, 2024



Average length of stay, Short-term rentals, 2024

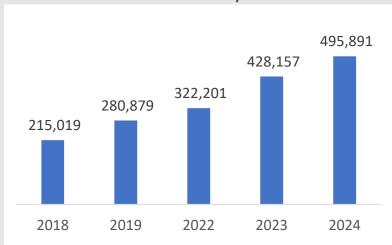


+0.40 nights (vs. 2019)

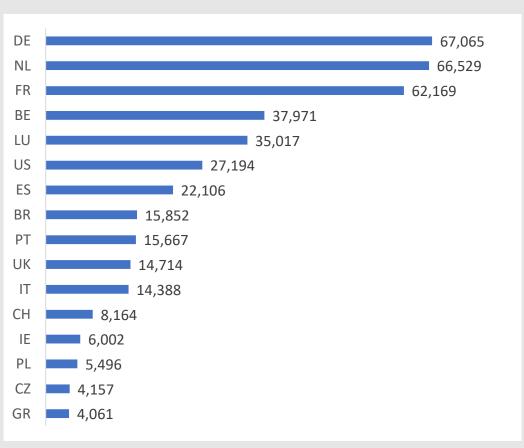
Arrivals, Short-term rentals, 2024



Nights, Short-term rentals, 2018-2024



Top source markets, nights, Short-term rentals, 2024



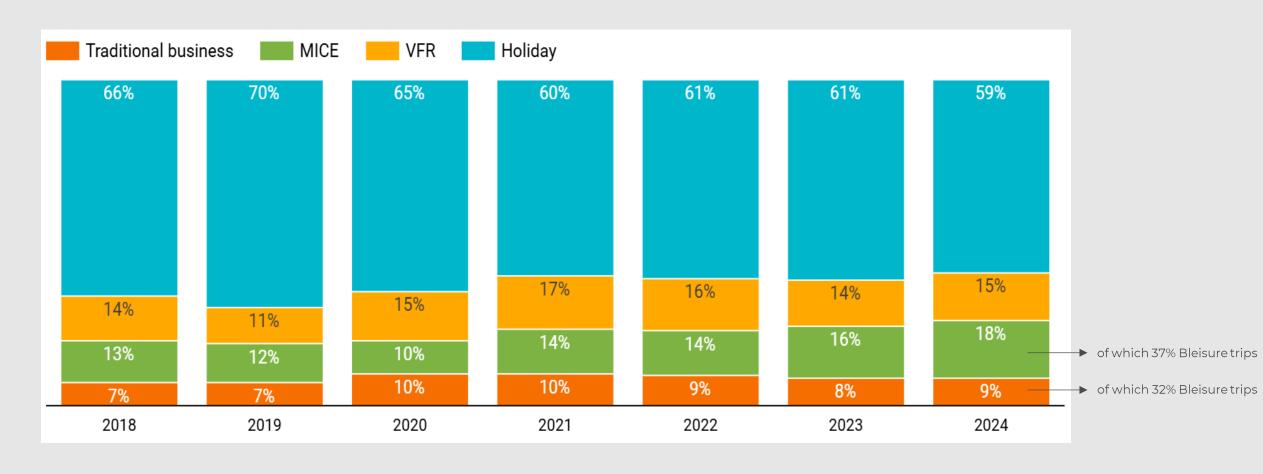
61% of all nights, and 62% of all inbound nights in Luxembourg City



Characteristics of inbound trips

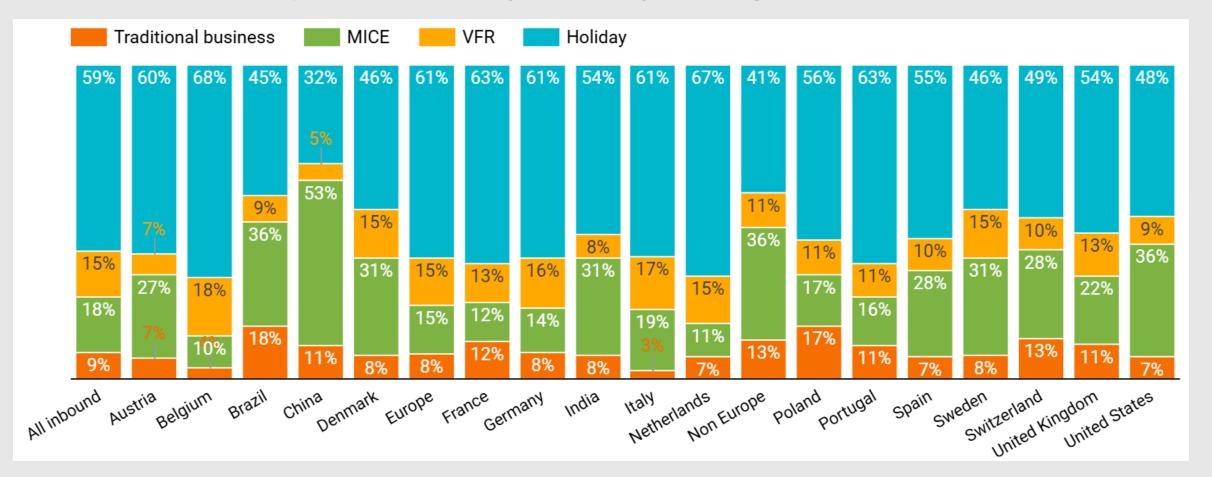


Purpose of visit, 2018-2024



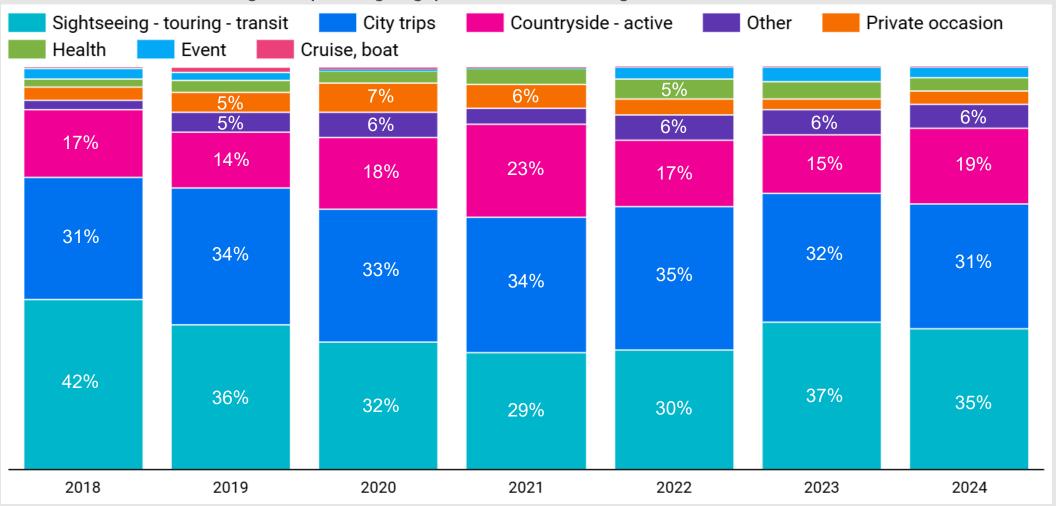


Purpose of visit by country of origin, 2024



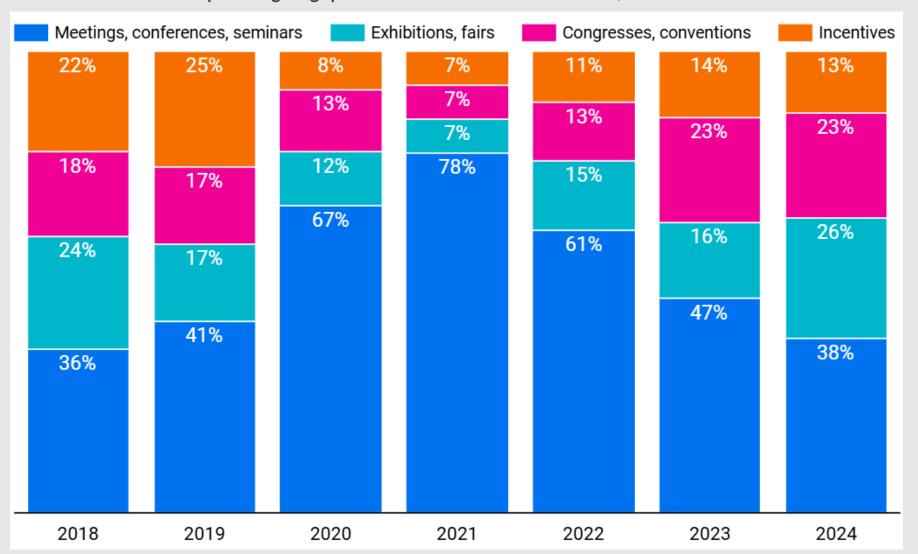


Holiday trips by type of holiday, 2018-2024





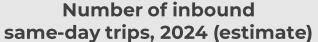
MICE trips by type of MICE events, 2018-2024



Inbound same-day trips to Luxembourg



2024

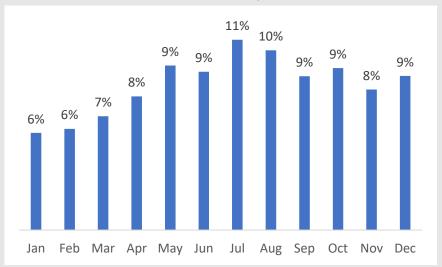




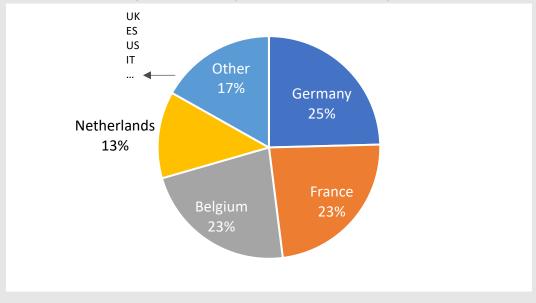
Average length of same-day trips



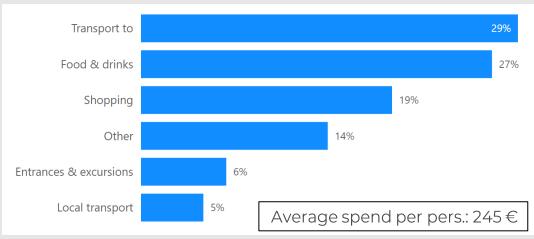
Seasonality % of same-day trips



Origin country, % of same-day trips



Expenditure of same-day leisure visitors



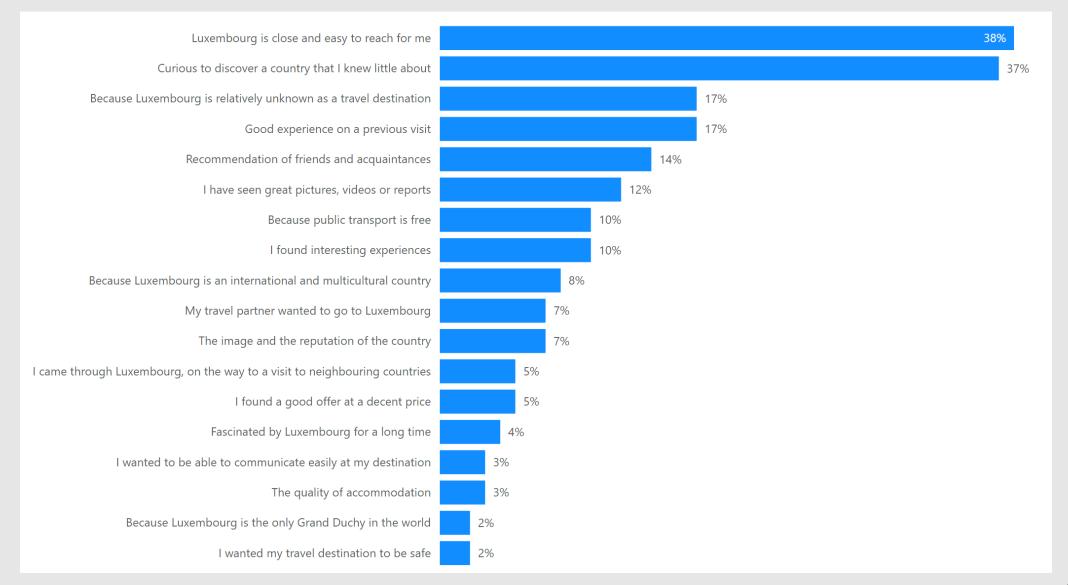
Sources: LFT estimates, Mobile phone data (Editus/LFT), LFT/Ilres Visitor Survey.



Travel behaviour of inbound leisure visitors

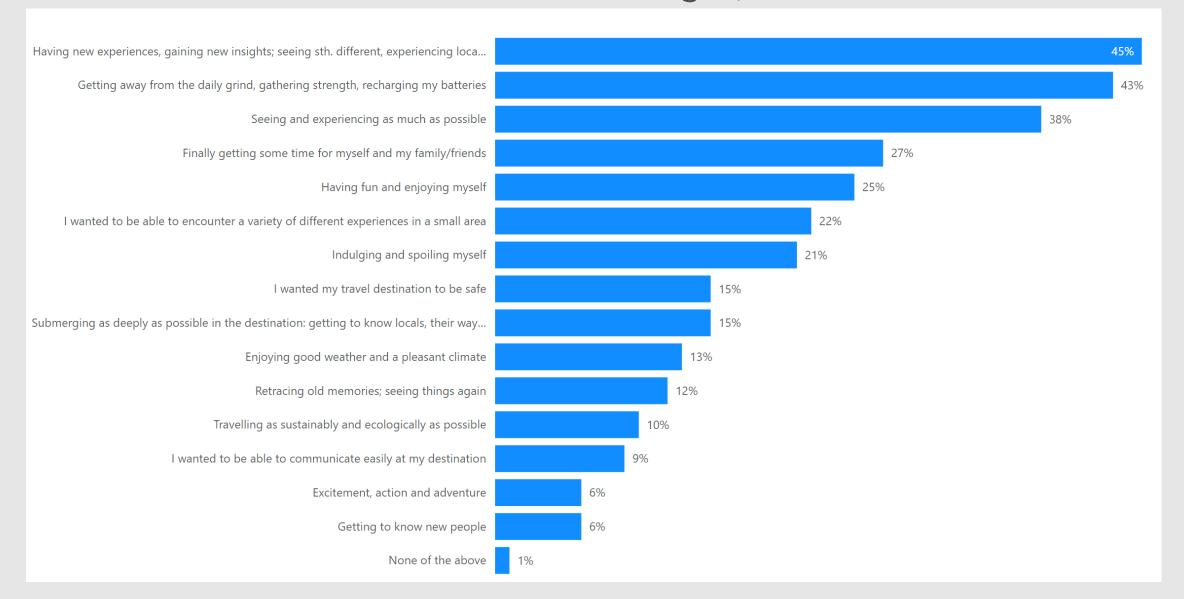
Key decision criteria for choosing Luxembourg





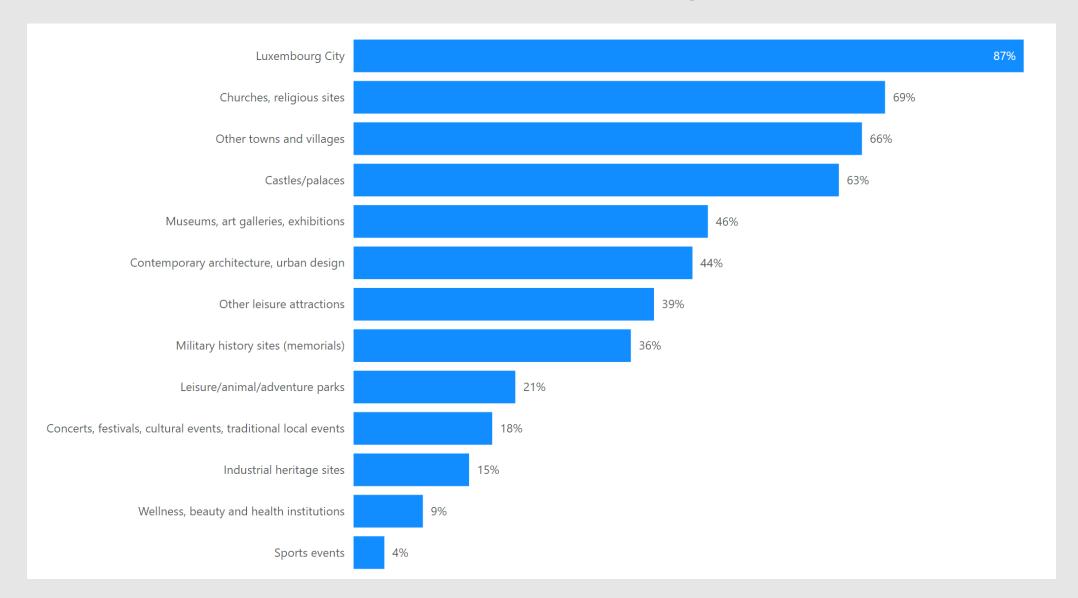
Key travel motives





Type of places visited in Luxembourg





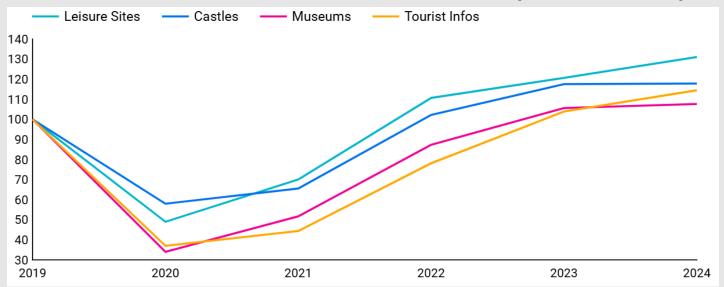
Visitors to Tourist Infos & Attractions

2019-2024

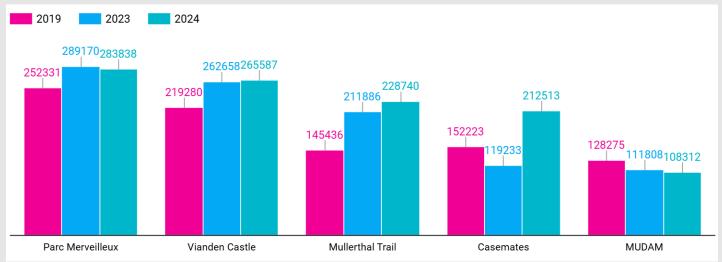




Tourist Infos & Attractions, visitor number trend (2019 = index 100)

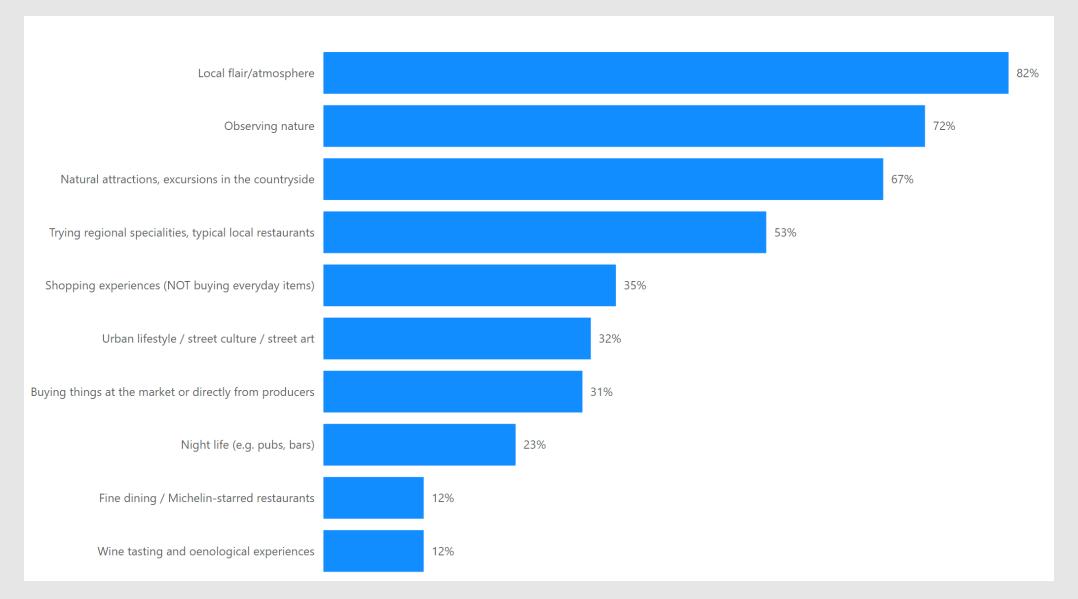


Top attractions by visitor number



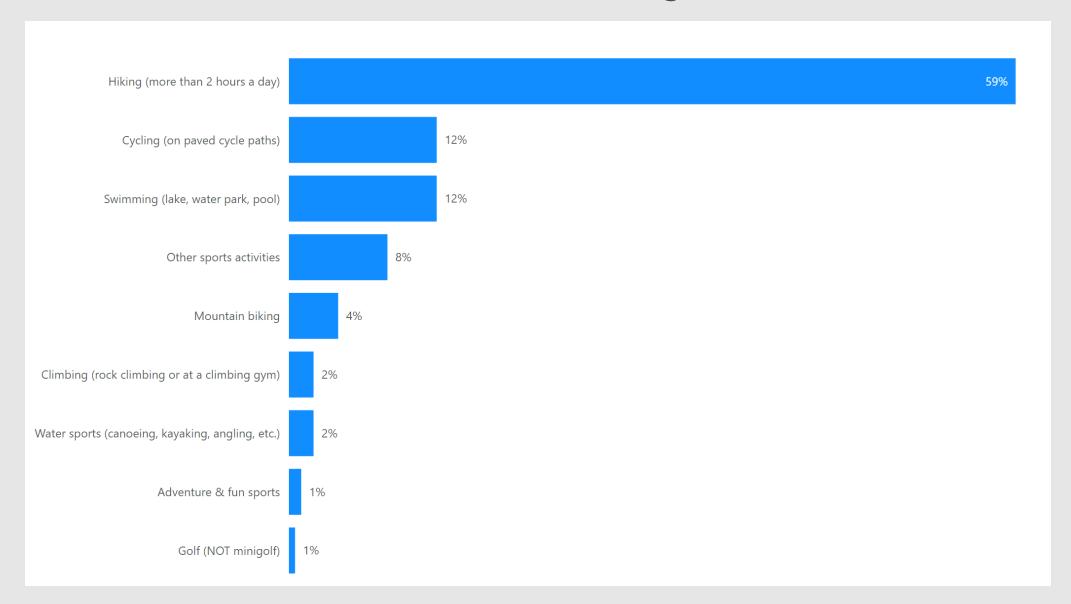
Non-sporting activities undertaken in Luxembourg





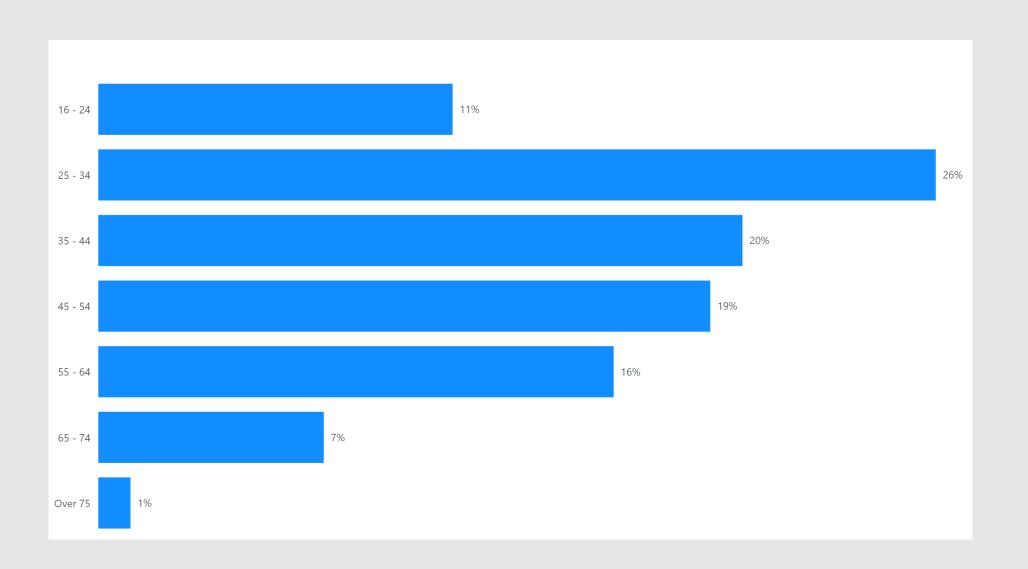
Sporting activities undertaken in Luxembourg





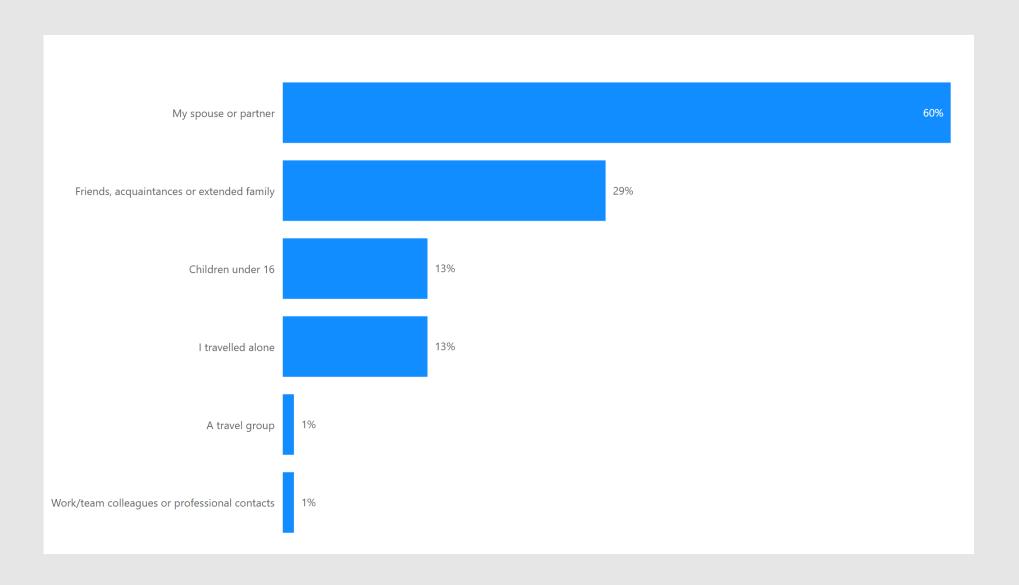
Age groups





Travel party



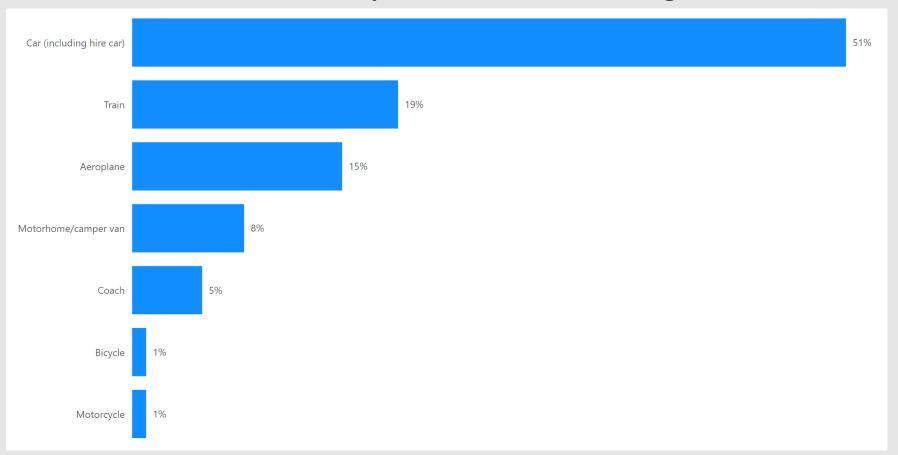


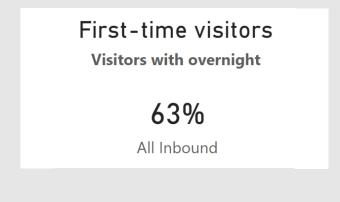
Transport, new visitors and cross-border trips



Inbound leisure visitors with overnight, 2023-2024

Mode of transport to access Luxembourg



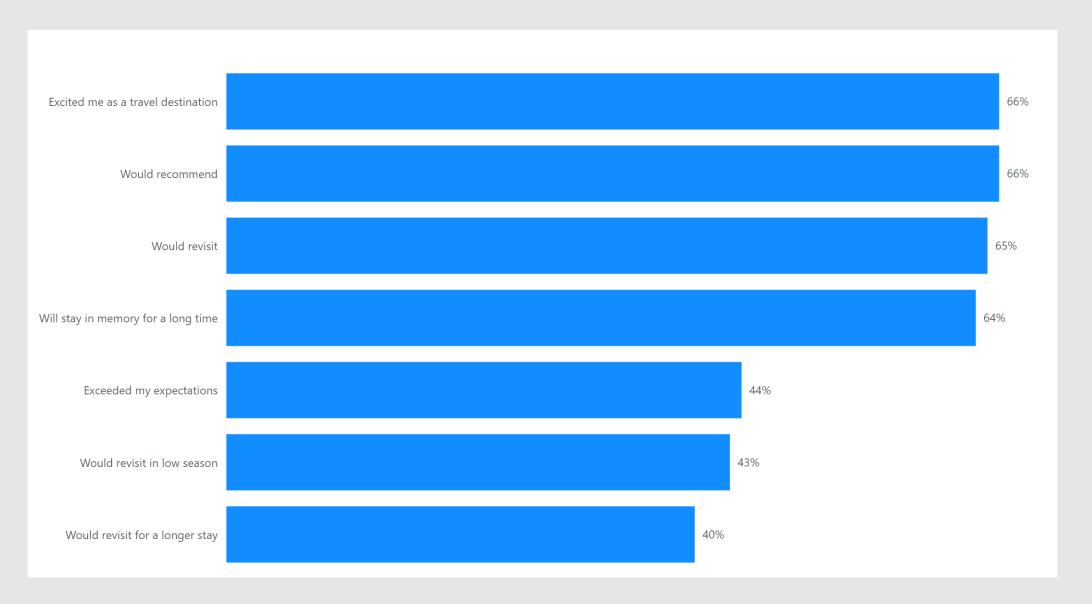




Visitor satisfaction and recommendation



Inbound leisure visitors, 2023-2024



Perceptions of overtourism & sustainability – Tourism Intensity – Tourism Density



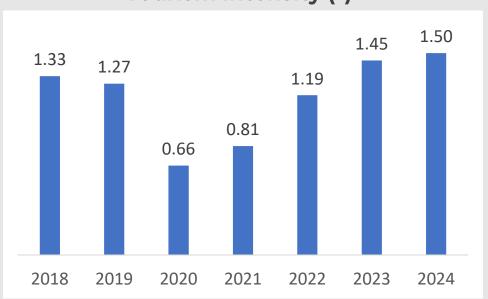
% of leisure overnight visitors considering Luxembourg to be generally "overcrowded", 2023-2024 (brand feature)¹



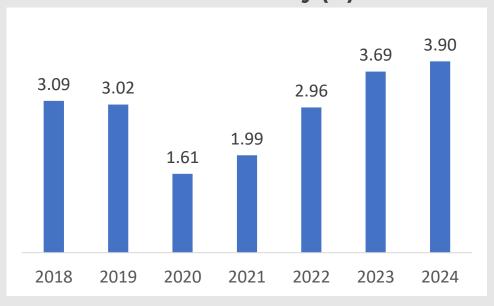
% of leisure overnight visitors considering Luxembourg to be a "sustainable destination", 2023-2024 (brand feature)¹



Tourism Intensity (*)²



Tourism Density (**)²



(**) Number of tourist overnight stays per day per km².

^(*) Number of tourist overnight stays per 100 residents per day.



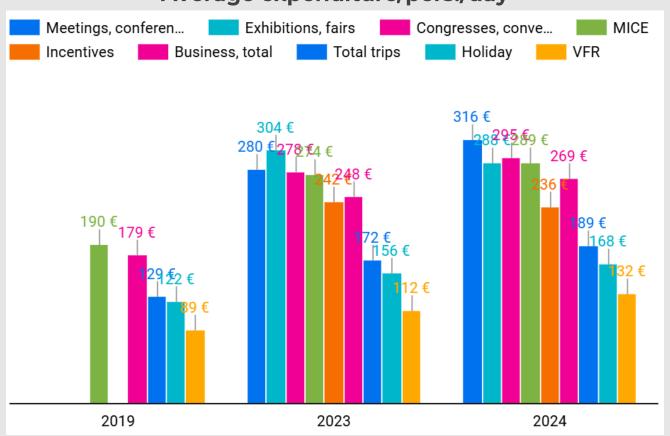
Tourism Economy & Infrastructure

Expenditure

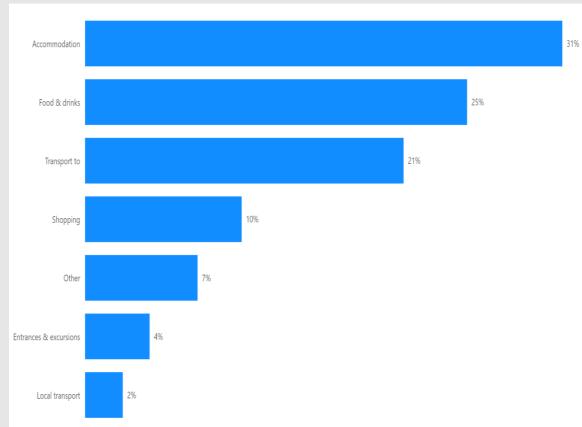


Inbound trips to Luxembourg with overnight (all accommodation)

Average expenditure/pers./day



Expenditure of leisure inbound visitors by categories, 2023-2024



Occupancy rates, ADR and RevPAR

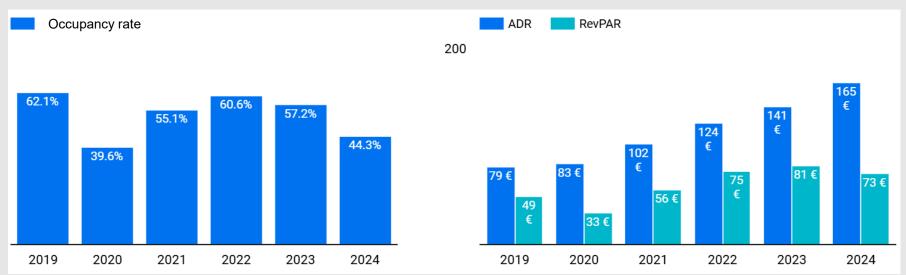
Hotels and short-term rentals



Hotels



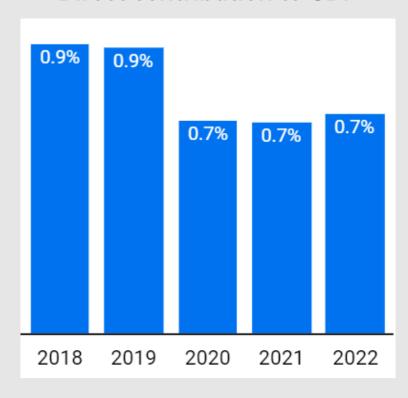
Short-term rentals



Economic contribution of tourism



Direct contribution to GDP



Inbound tourist expenditure, million €

Inbound spend 2019 Inbound spend 2022 3,459 € 3,756 €

Employment in tourism

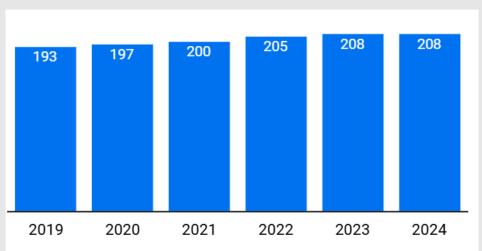
Employment 2019 Employment 2022 **40,421**

Hotel capacities

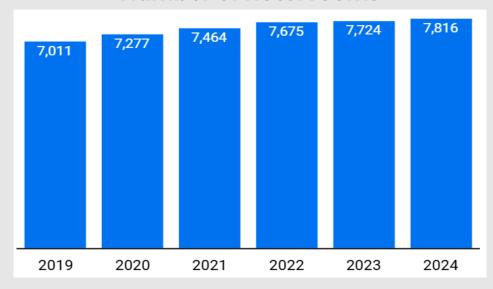
2019-2024



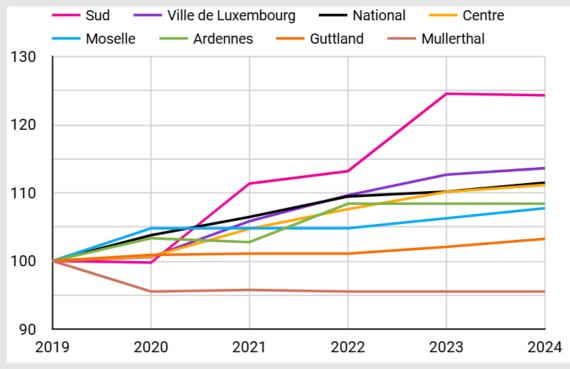
Number of hotels



Number of hotel rooms



Hotel rooms, regional trend (2019 = index 100)

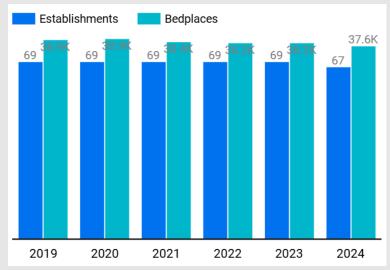


Campsites & Youth Hostels capacities

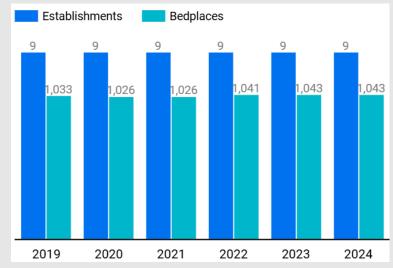
2019-2024



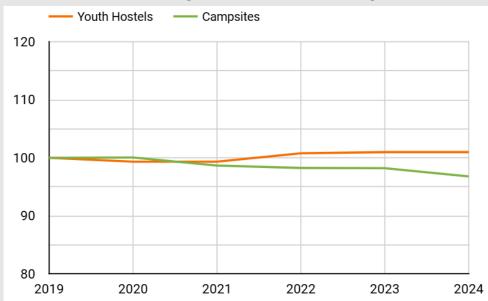
Number of campsites and campsite bedspaces



Number of youth hostels and youth hostel bedspaces



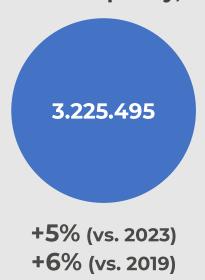
Campsite & youth hostel bedspaces, trend (2019 = index 100)



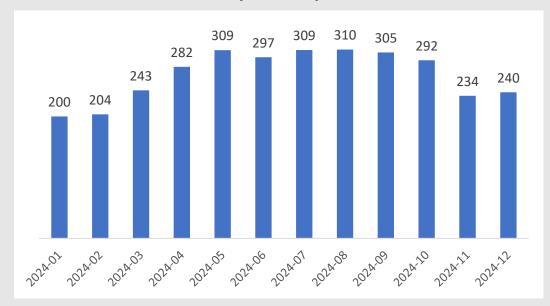
Air travel: seat capacities



Total seat capacity, 2024



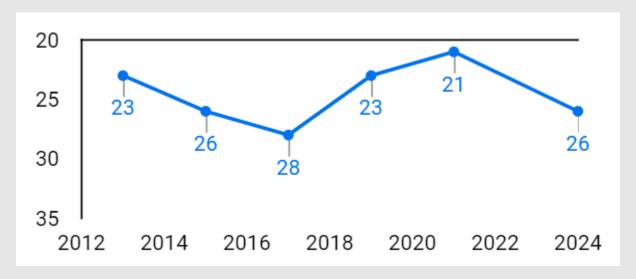
Monthly seat capacity, 2024 (in 1,000s)



Quality of tourist infrastructure



Luxembourg's ranking in WEF Travel Competitiveness Report

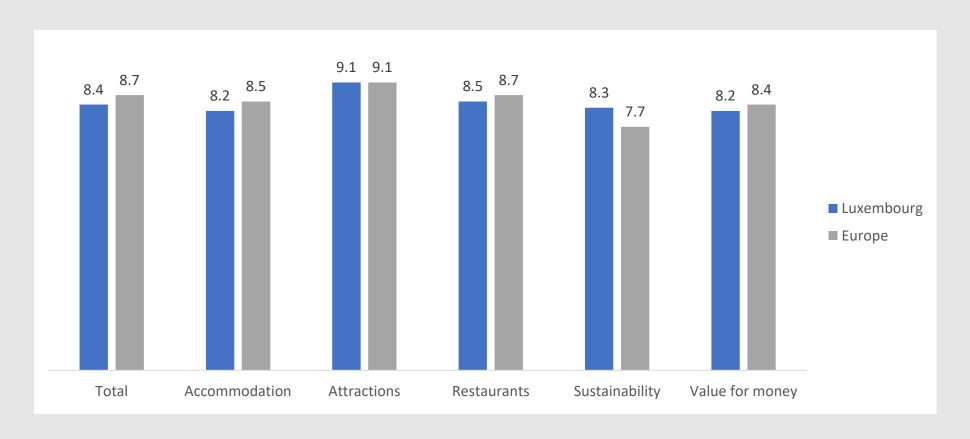


Quality labels, number of certified accommodation, 2025

Ecolabel	Bed & Bike	EureWelcome
49	83	57

Online reviews: satisfaction ratings vary by segment 2024





Average score on a scale of 1-10 of satisfaction ratings posted on online review sites (Trip Advisor, Google, etc.)

Luxembourg's current and potential visitors are more quality- than price-oriented



Quality vs. price orientation, leisure inbound visitors, 2023-2024



Quality rather than price as a general travel preference, outbound travellers, Ø 13 European markets



Trav int abroad = population planning to travel at least once abroad next year Past visits (ovn) = population having travelled to Luxembourg in the past (with an overnight)

Sympathy Lux: very high = population having expressed very high sympathy towards Luxembourg as a destination

Travel intent Lux: very high = population strongly planning to travel to Luxembourg within next 3 years

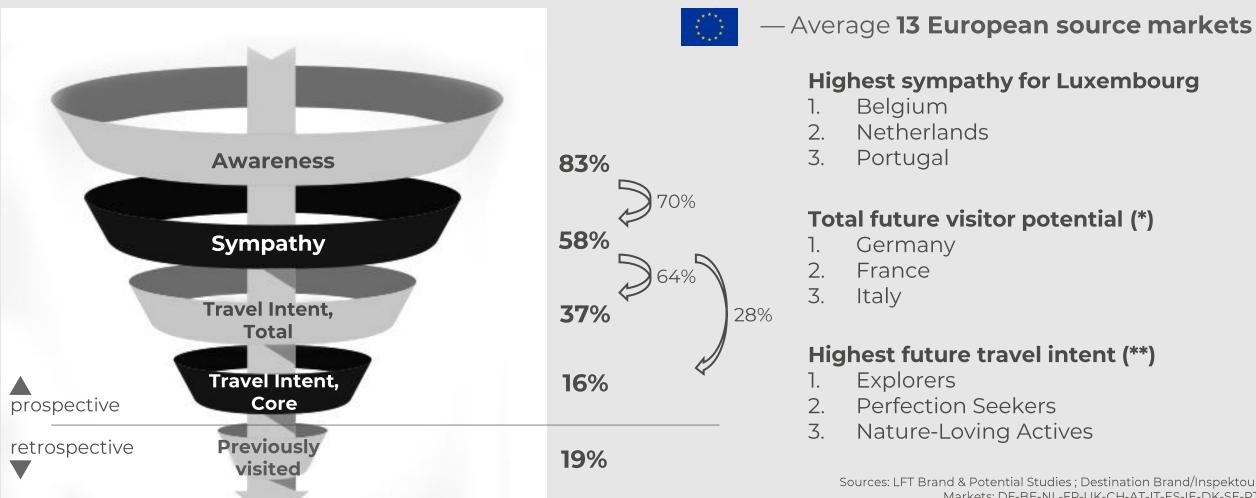


Target segments, Brand & Growth Potential

Destination Luxembourg - Brand Funnel 2024



Assessing Luxembourg's brand strength as a destination



Highest sympathy for Luxembourg

- Belgium
- Netherlands
- Portugal

Total future visitor potential (*)

- Germany
- France
- Italy

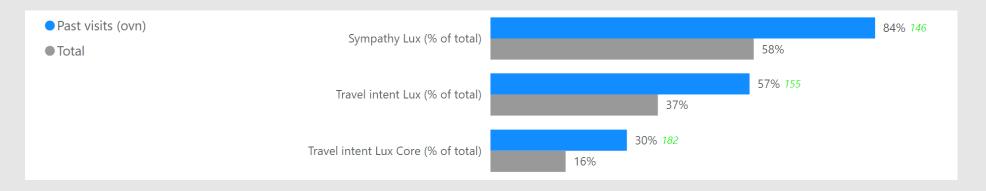
Highest future travel intent ()**

- **Explorers**
- Perfection Seekers
- Nature-Loving Actives

Sources: LFT Brand & Potential Studies; Destination Brand/Inspektour. Markets: DE-BE-NL-FR-UK-CH-AT-IT-ES-IE-DK-SE-PT. (*) Based on travel intent for next 3 years. (**) Based on relative shares of travel intent for next 3 years.

Tourism is a positive driver to Luxembourg's nation brand



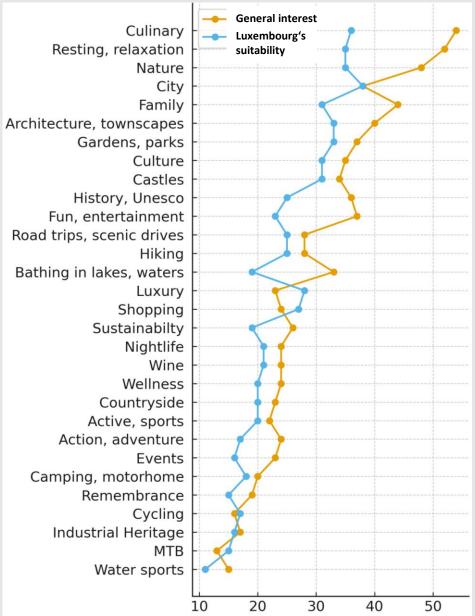


Sympathy towards Luxembourg and future travel intent to Luxembourg are both considerably higher among respondents having visited Luxembourg in the past.

Luxembourg's Theme Competence (*)







Growth potential for themes (*)**

- Culinary
- Resting/relaxation
- Nature
- Family
- History & Unesco
- Sustainability
- Action, adventure
- Events

Best-ranked themes in each source market

City: DK-FR-DE-IE-PL-CH-ES

• Nature: BE-NL

Culinary: AT-SE

Castles: IT

• Family: PT

Architecture/townscapes: UK

(*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

(**) DE-BE-NL-FR-UK-CH-AT-IT-ES-IE-DK-SE-PT.

(***) Themes for which Luxembourg's theme suitability is still relatively low, compared to the overall general theme interest – see chart.

LFT Target Segments

Inbound leisure visitors with overnight, 2024 (*)



Explorers

Nature-Loving Actives

Relaxation Seekers

Short Breakers

Perfection Seekers

Leisure-Oriented















% pts.













Residents' attitudes towards tourism

Residents' attitudes towards tourism in Luxembourg



% residents who 'support tourism and want it to remain important and even to grow in importance'



% of residents who say that 'the positive benefits of tourism outweigh the negative effects'

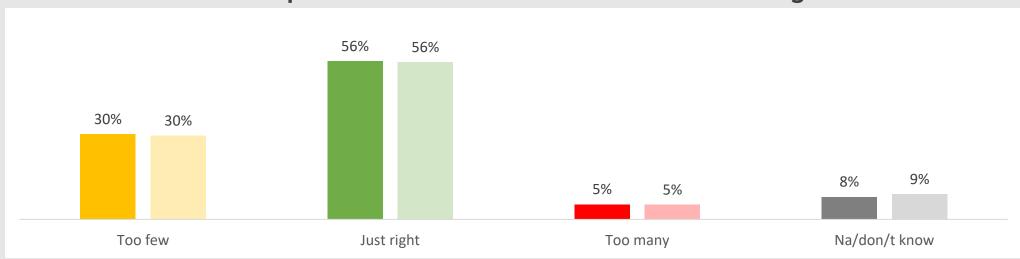


Residents' attitudes towards tourism in Luxembourg



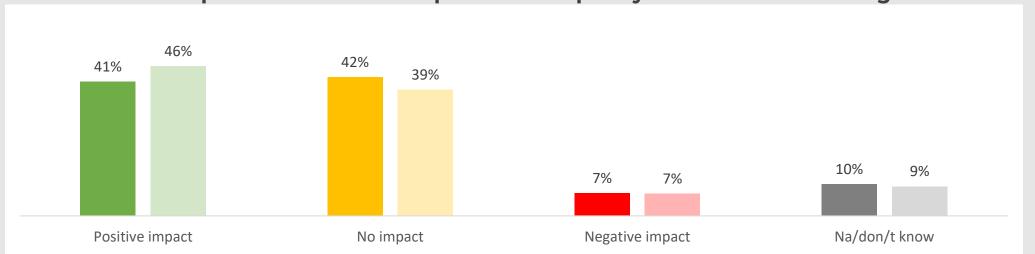
2024

Perception of the number of visitors in Luxembourg



Dark bars refer to 2024, light bars to 2023 values

Perception of tourism's impact on the quality of life in Luxembourg





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