Luxembourg for Tourism

Market profile AUSTRIA 2024

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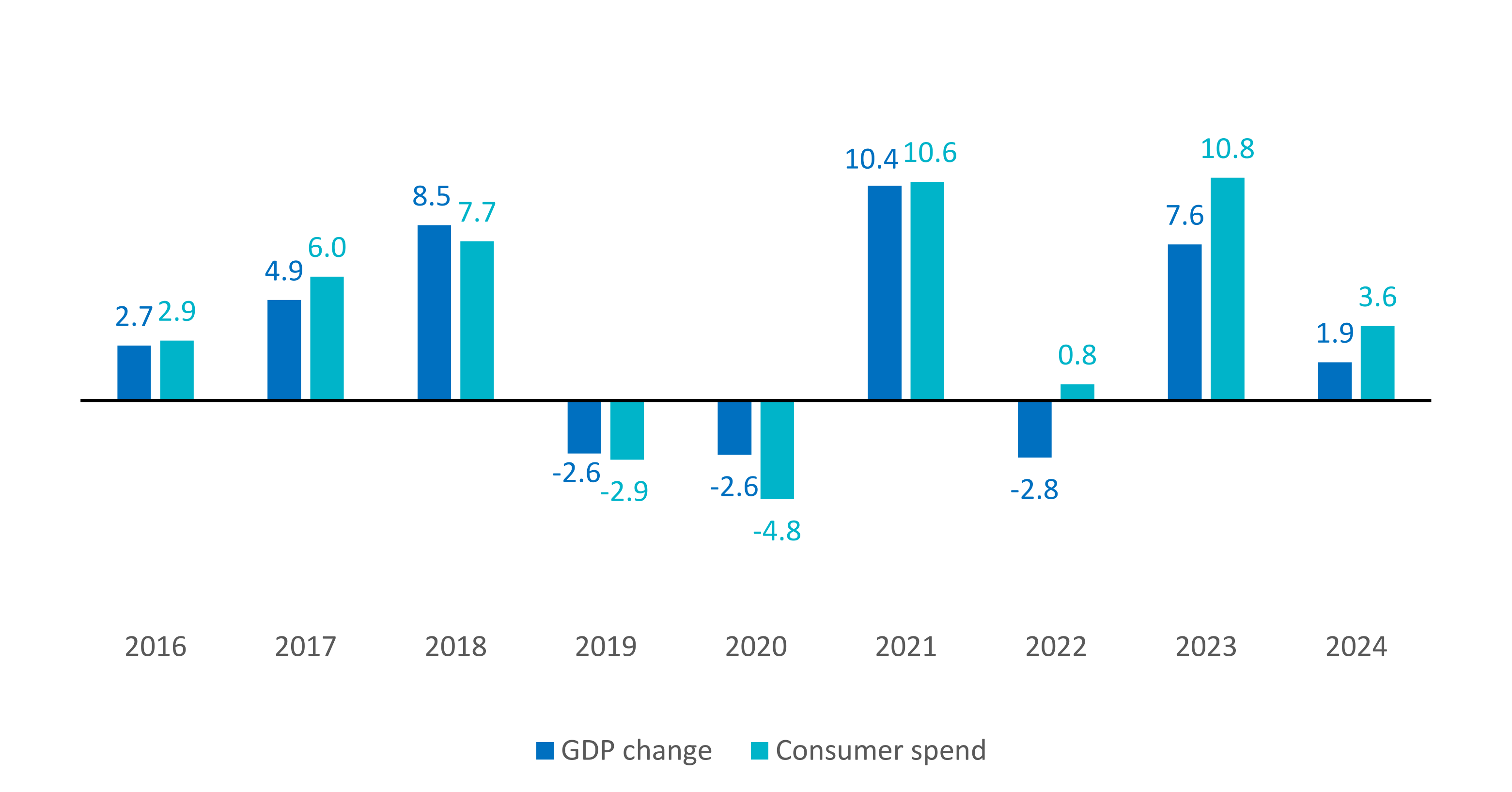
Economic indicators & General Travel Demand

Economic indicators – General travel demand

GDP and consumer spending, % annual change



Economy & population

GDP ($) per capita
57,110.43

Unemployment (%)
5.18

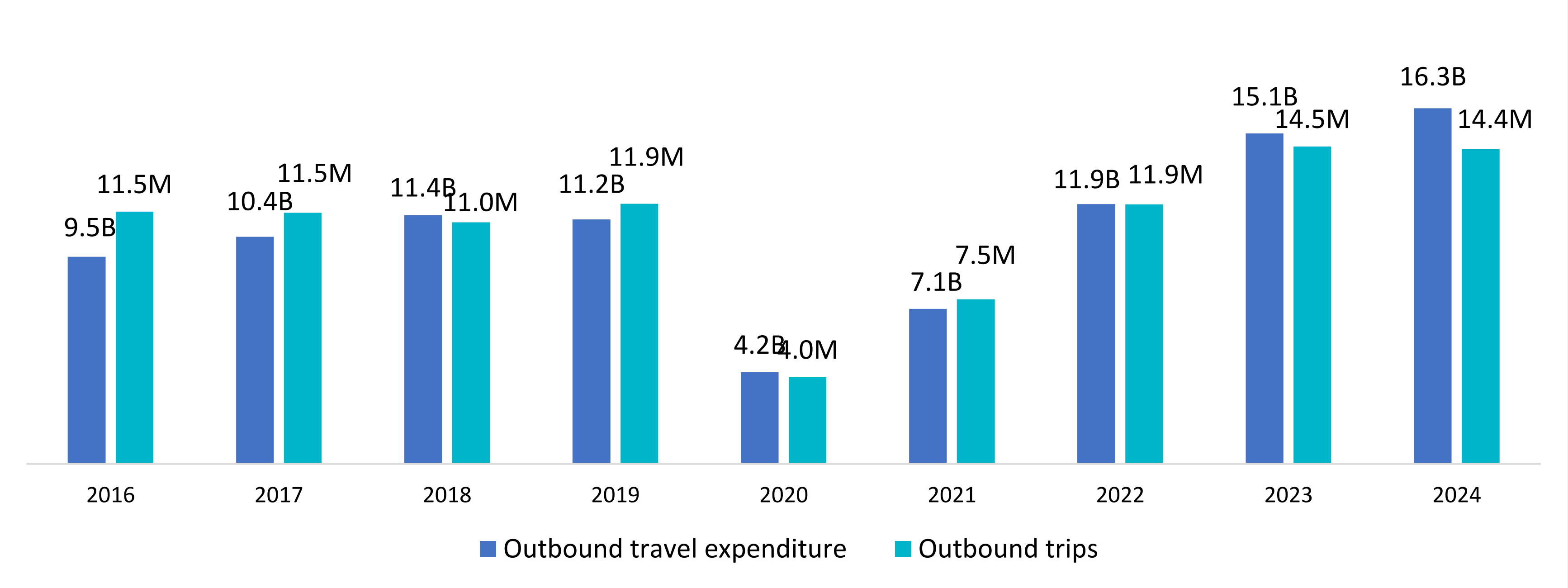
Inflation(%)
2.94

Population
9,168,520

Sources: Oxford Economics.

Economic indicators – General travel demand

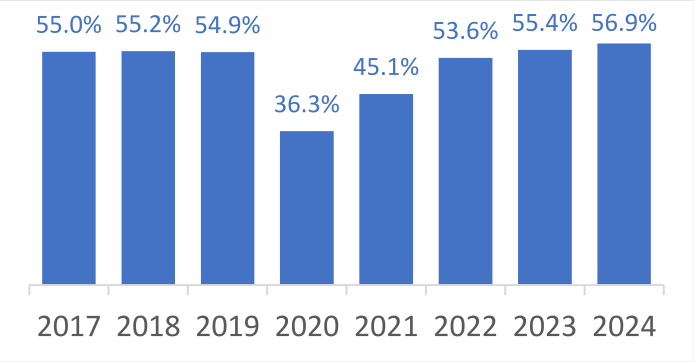
Outbound trips and travel expenditure



Outbound travel intensity
1.57 trips
per inhabitant (2024)

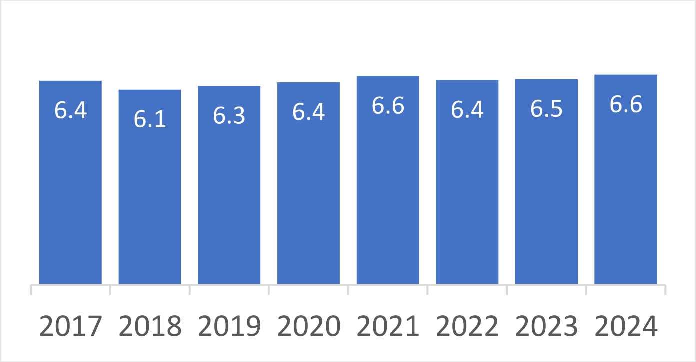
Average spend
per outbound trip (2024)
1,129 $

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2024)
84.8%

Average length of stay, nights, all outbound trips



Share of short trips
(1-3 nights),
% all outbound
trips (2024)
38.0%

Sources: Eurostat, Oxford Economics.

Arrivals & nights in paid accommodation

Nights in paid accommodation

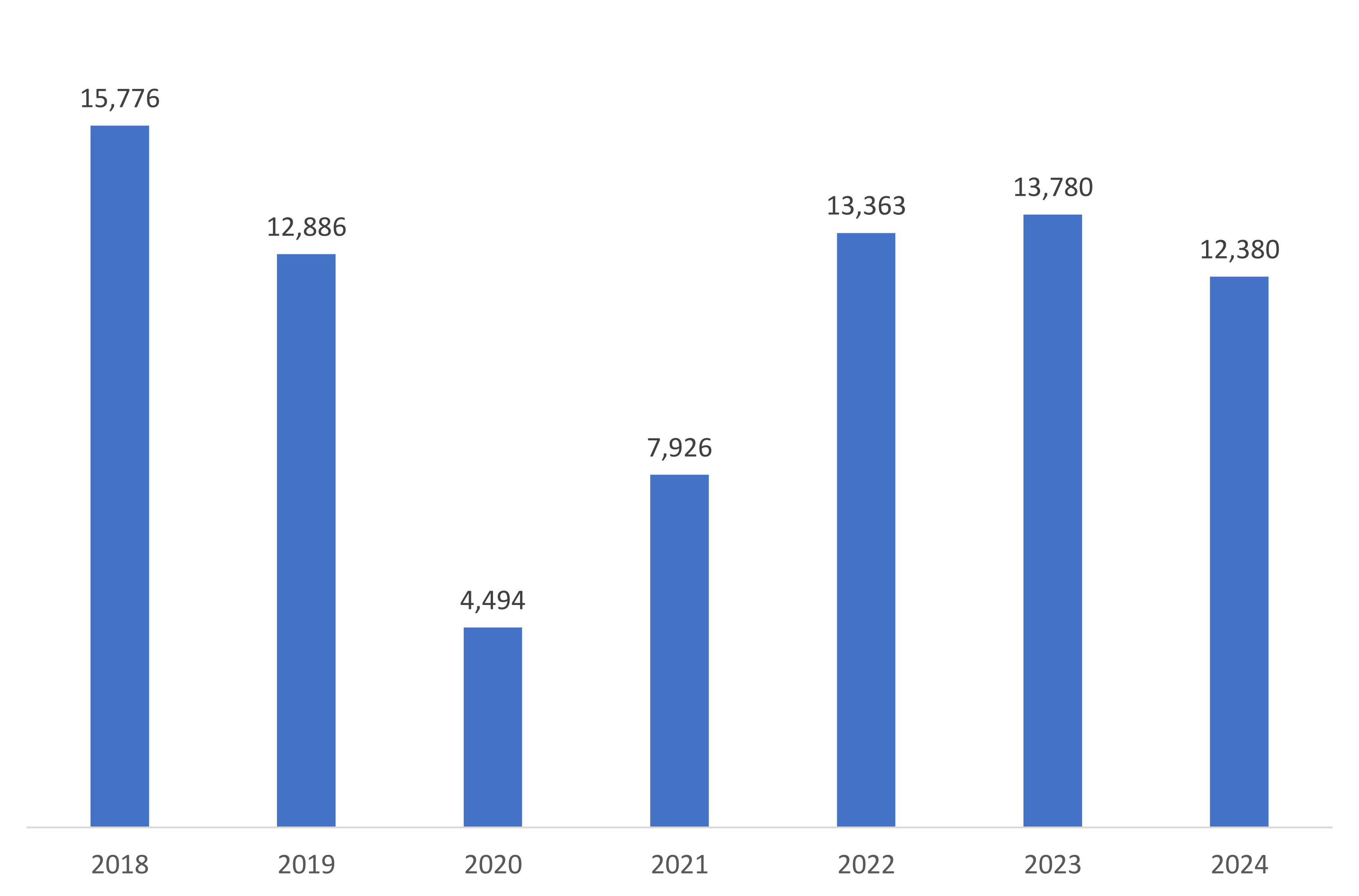
2024 and 2018-2024

**Nights,
paid accommodation, 2024**

12.380

-10% (vs. 2023)

-4% (vs. 2019)



Source: Statec

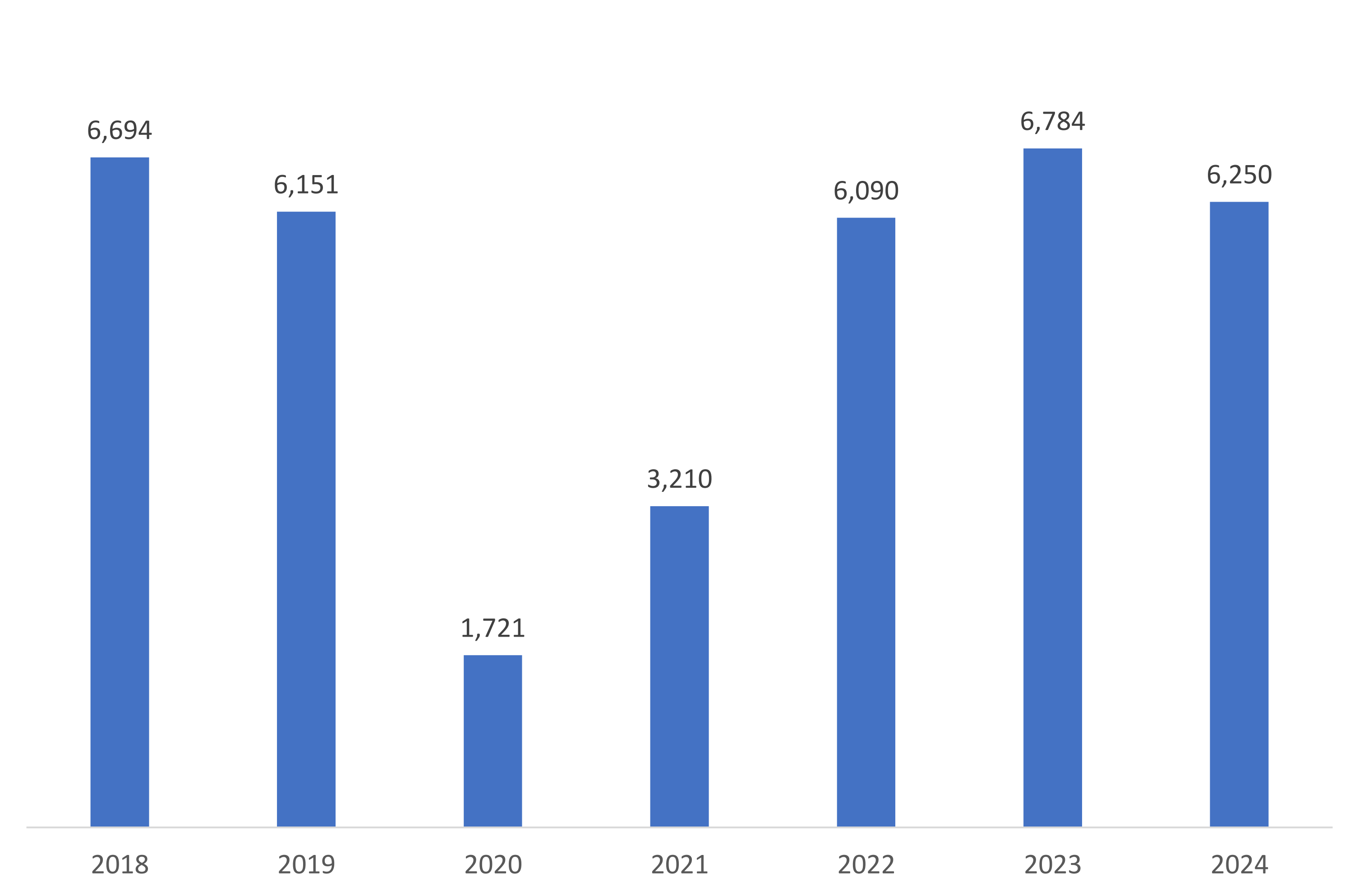
Arrivals in paid accommodation

2024 and 2018-2024

**Arrivals,
paid accommodation, 2024**

-8% (vs. 2023)

+2% (vs. 2019)



Source: Statec

Length of stay, paid accommodation

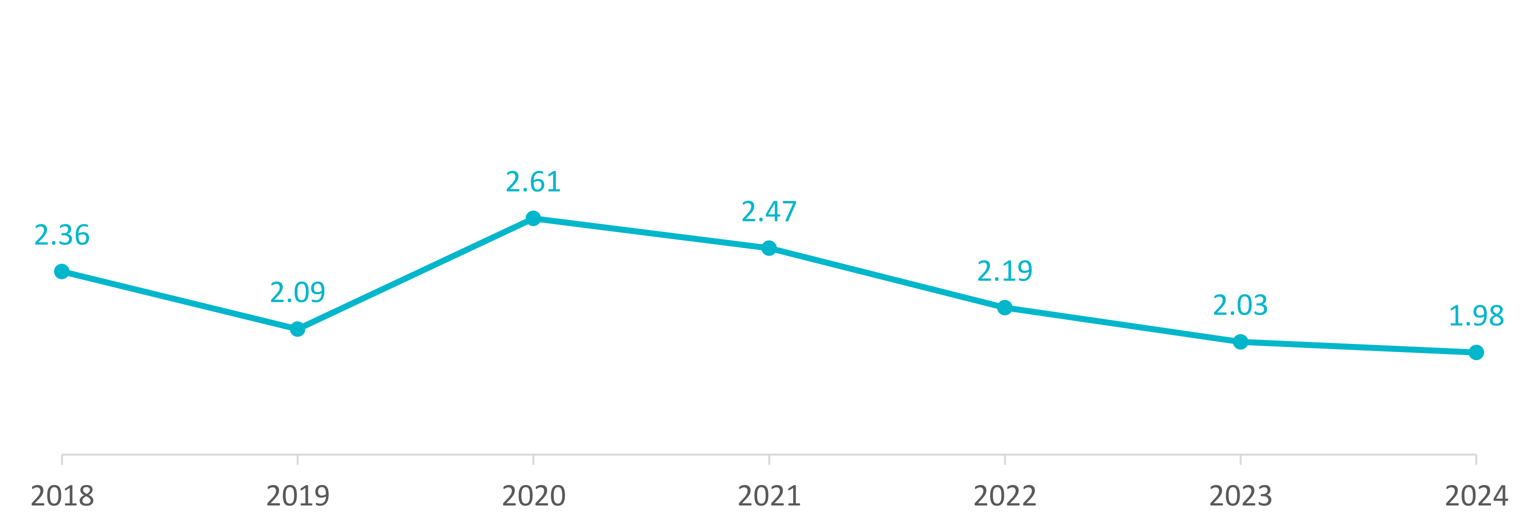
2024 and 2018-2024

Average length of stay, paid accommodation, 2024

1.98 nights

-0.05 nights (vs. 2023)

-0.11 nights (vs. 2019)

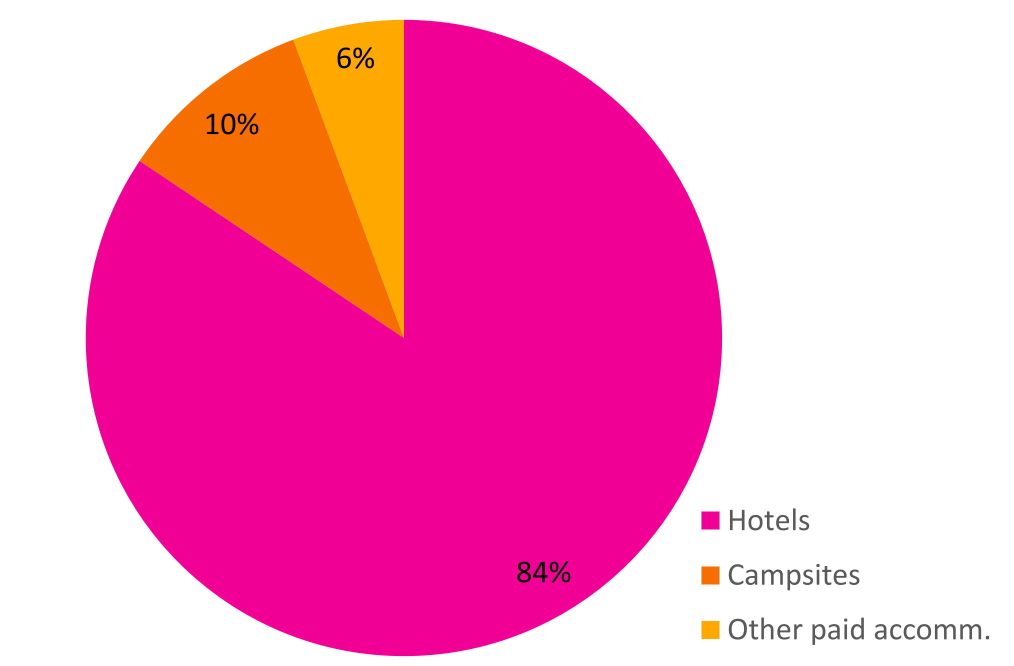


Source: Statec

Nights & arrivals in paid accommodation

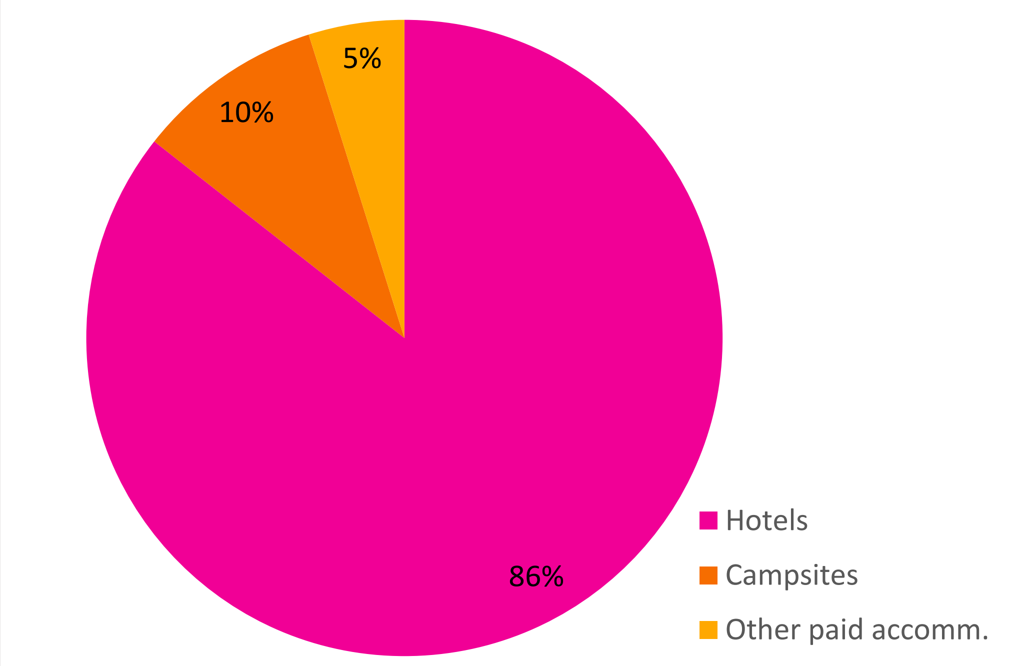
Type of accommodation, 2024

Nights, paid accommodation, 2024



Hotels	10.448	-13% (vs. 2023)	-9% (vs. 2019)
Campsites	1.232	-1% (vs. 2023)	+73% (vs. 2019)
Other paid accomm.	700	+31% (vs. 2023)	-3% (vs. 2019)

Arrivals, paid accommodation, 2024



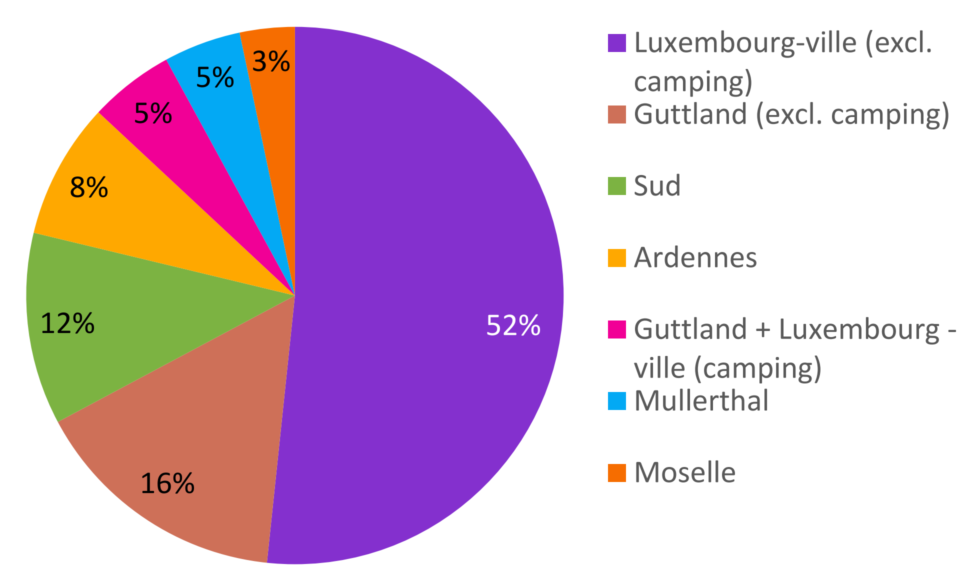
Hotels	5.350	-9% (vs. 2023)	-1% (vs. 2019)
Campsites	596	-4% (vs. 2023)	+51% (vs. 2019)
Other paid accomm.	304	+12% (vs. 2023)	-19% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

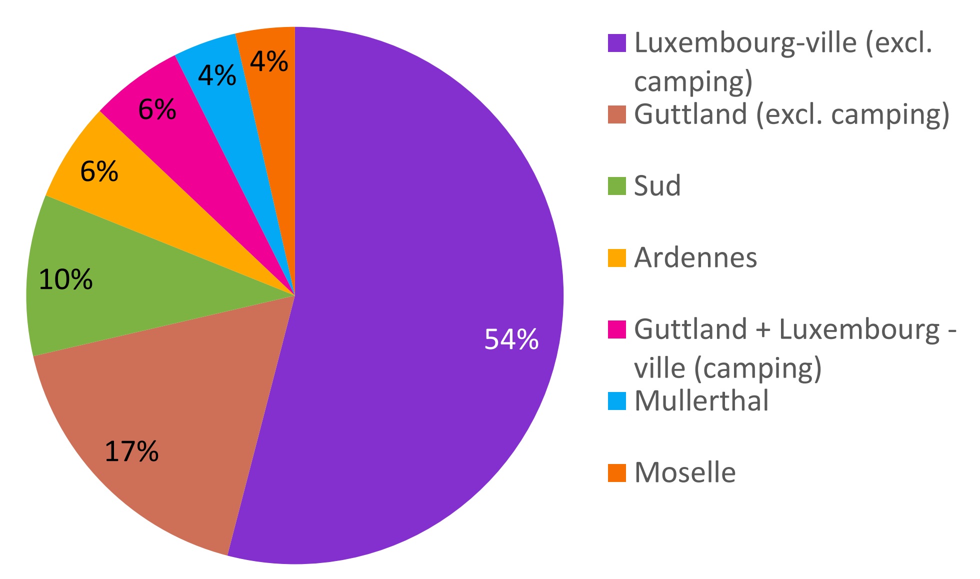
Regions, 2024

Nights, paid accommodation, 2024



Lux.-City (excl. camping)	6.396	-8% (vs. 2023)	-6% (vs. 2019)
Guttland (excl. camping)	1.924	-18% (vs. 2023)	+1% (vs. 2019)
South	1.430	-32% (vs. 2023)	-36% (vs. 2019)
Eislek	1.014	-2% (vs. 2023)	+27% (vs. 2019)
Guttland/Lux.-City (camping)	632	-19% (vs. 2023)	+59% (vs. 2019)
MPSL	575	+189% (vs. 2023)	+117% (vs. 2019)
Moselle	409	+9% (vs. 2023)	-15% (vs. 2019)

Arrivals, paid accommodation, 2024



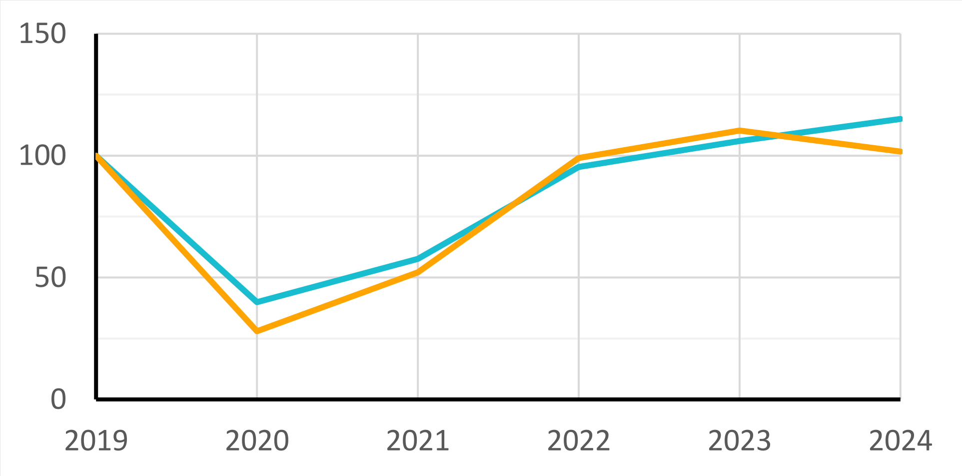
Lux.-City (excl. camping)	3.378	-7% (vs. 2023)	-3% (vs. 2019)
Guttland (excl. camping)	1.083	-26% (vs. 2023)	+20% (vs. 2019)
South	607	-13% (vs. 2023)	-27% (vs. 2019)
Eislek	373	+36% (vs. 2023)	+15% (vs. 2019)
Guttland/Lux.-City (camping)	348	-21% (vs. 2023)	+24% (vs. 2019)
MPSL	238	+148% (vs. 2023)	+97% (vs. 2019)
Moselle	223	+25% (vs. 2023)	+5% (vs. 2019)

Source: Statec

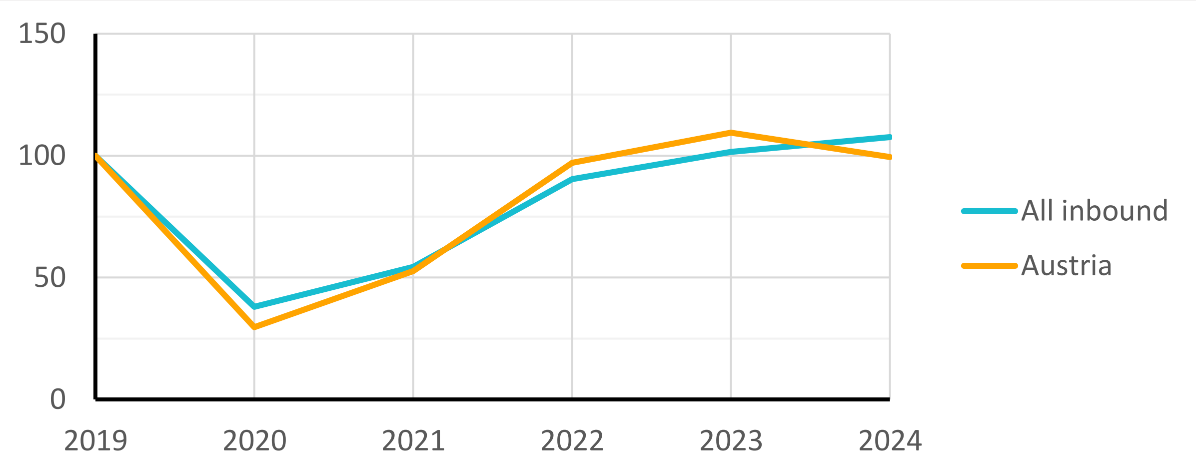
Arrivals in paid accommodation

Trends 2019-2024

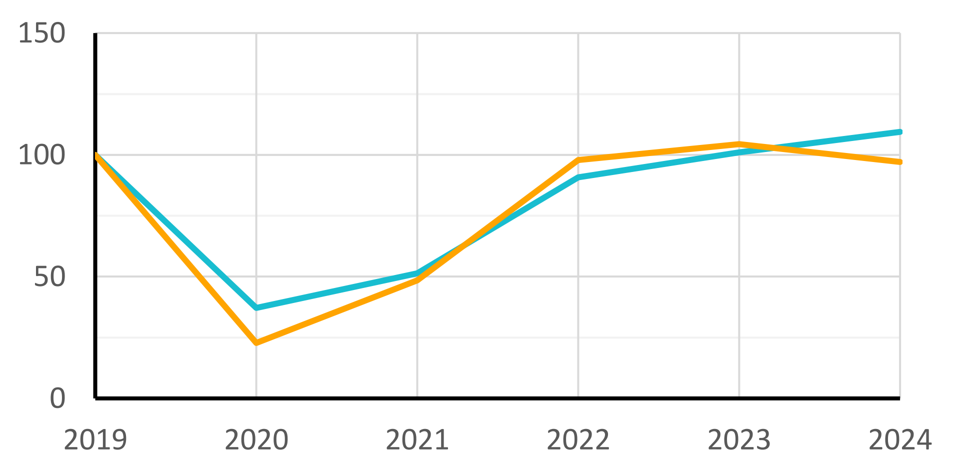
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



All paid accommodation (*), Luxembourg City (2019 = Index 100)



(*) excluding camping.
Source: Statec

Short-term rentals

2024 and 2018-2024

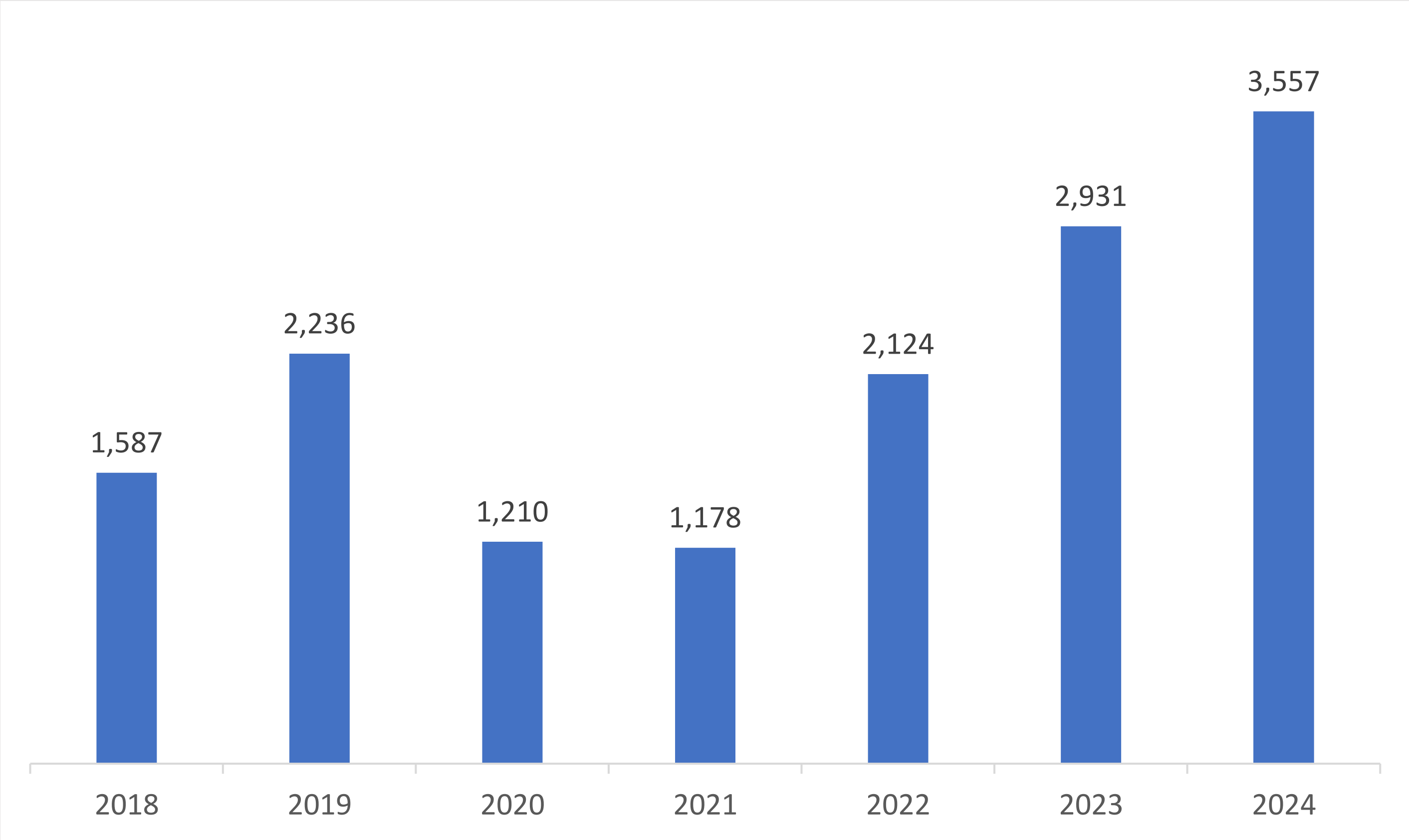
Nights,
Short-term rentals, 2024

3.557

21% (vs. 2023)

59% (vs. 2019)

Nights,
Short-term rentals, 2018-2024



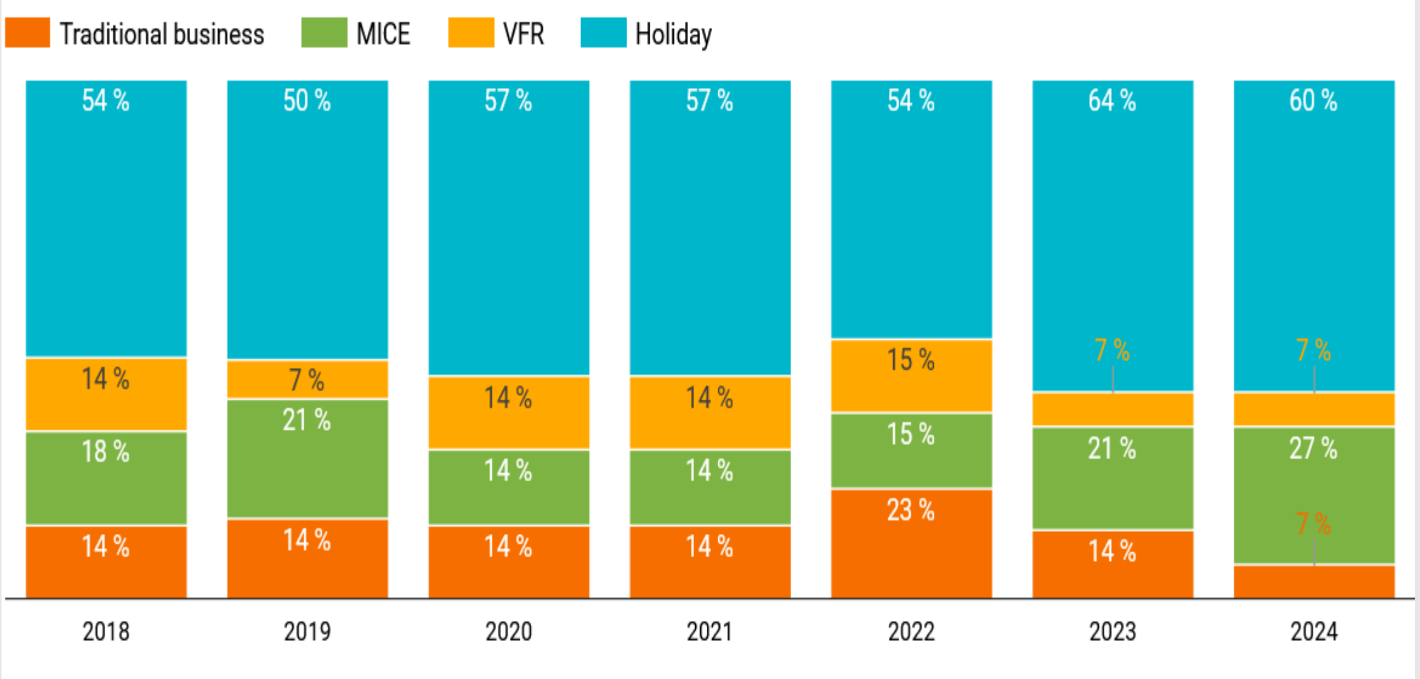
Source: Eurostat (experimental statistics).

Characteristics of inbound trips

Austrian trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2018-2024

Austrian trips to Luxembourg, 2018-2024



2024

	Austria to Luxembourg	Europe to Luxembourg
Holiday	60%	61%
VFR	7%	15%
MICE	27%	15%
Traditional Business	7%	8%

Source: World Travel Monitor/IPK International.

Inbound same-day trips to Luxembourg
2024

Number of inbound same-day trips, 2024 (estimate)

37.000

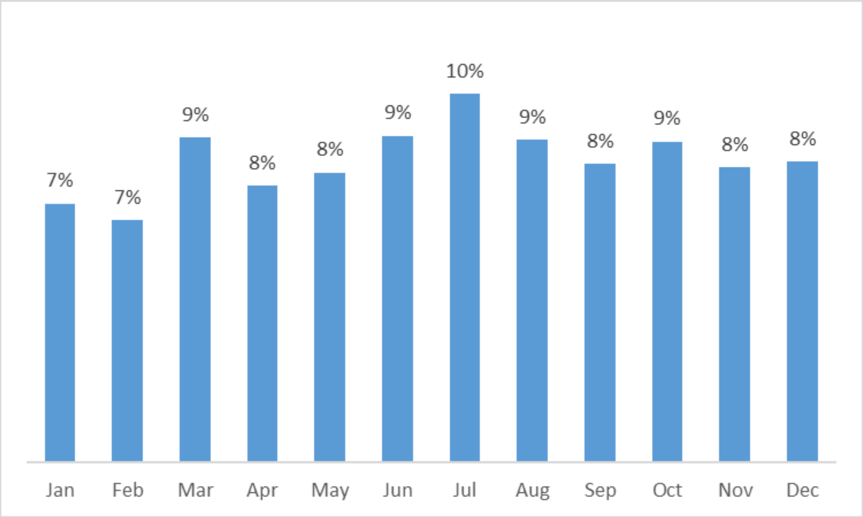
-12% (vs. 2023)

Average length of same-day trips

7,4 h

-1,0 h (vs. 2023)

Seasonality
% of same-day trips



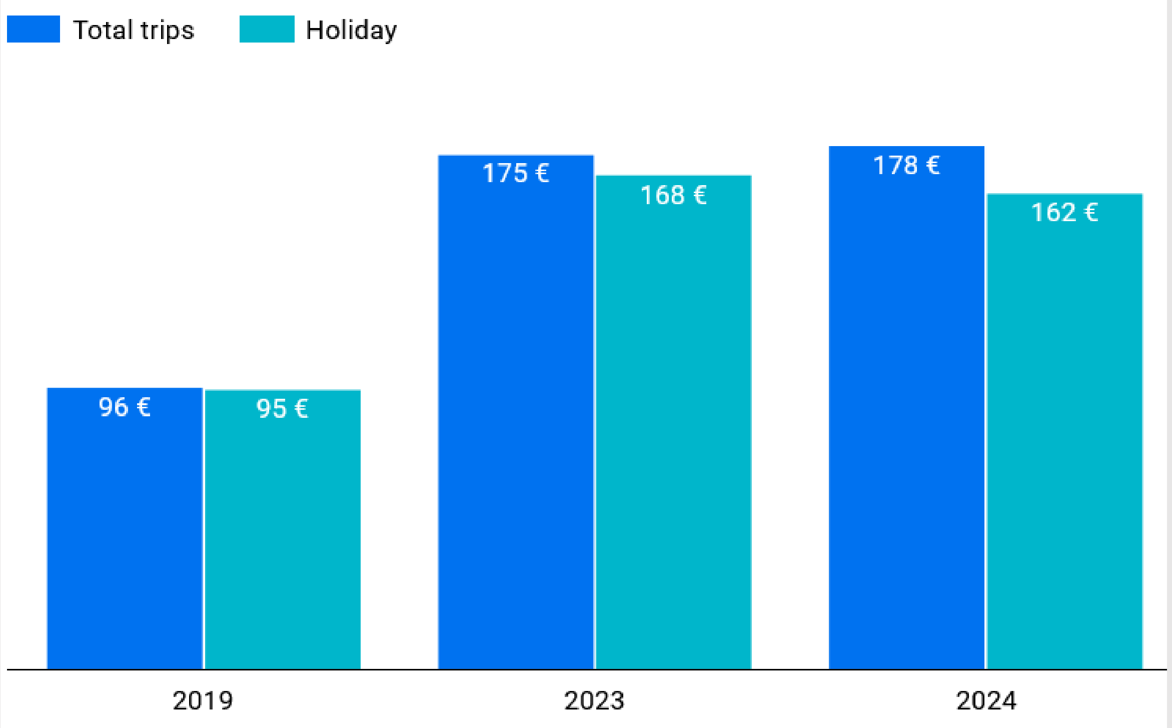
Sources: LFT estimates, Mobile phone data (Editus/LFT), LFT/Ilres Visitor Survey.

Travel behaviour of inbound leisure visitors

Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

Average expenditure/pers./day



2024

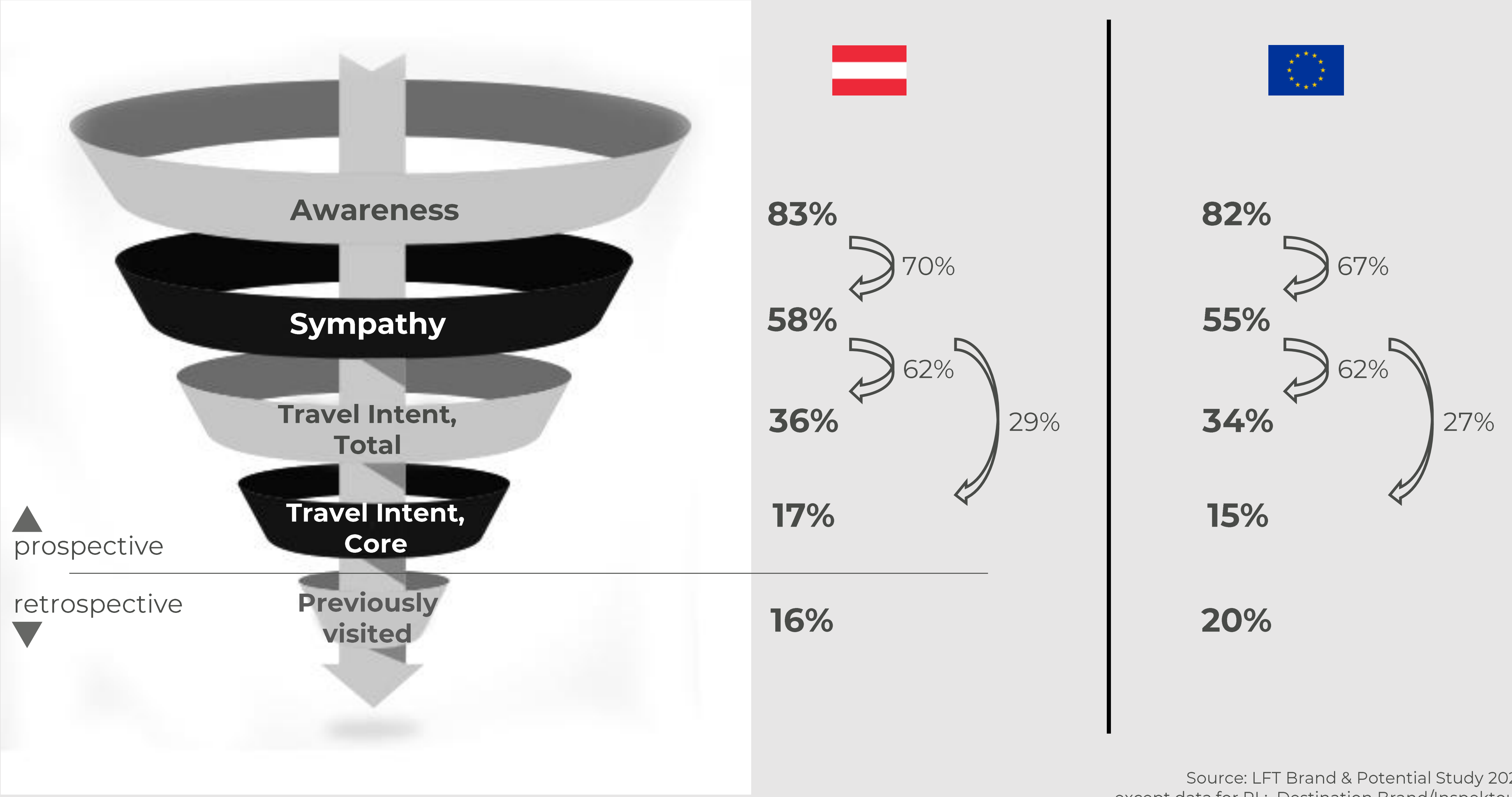
	Austria to Luxembourg	**All inbound to** Luxembourg
Spend/day/pers. on **all** trips	178€	189€
Spend/day/pers. on **holiday** trips	162€	168€

Sources: World Travel Monitor/IPK International, LFT/Ilres Visitor Survey.

Target segments,
Brand & Growth Potential

Destination Luxembourg - Brand Funnel 2024

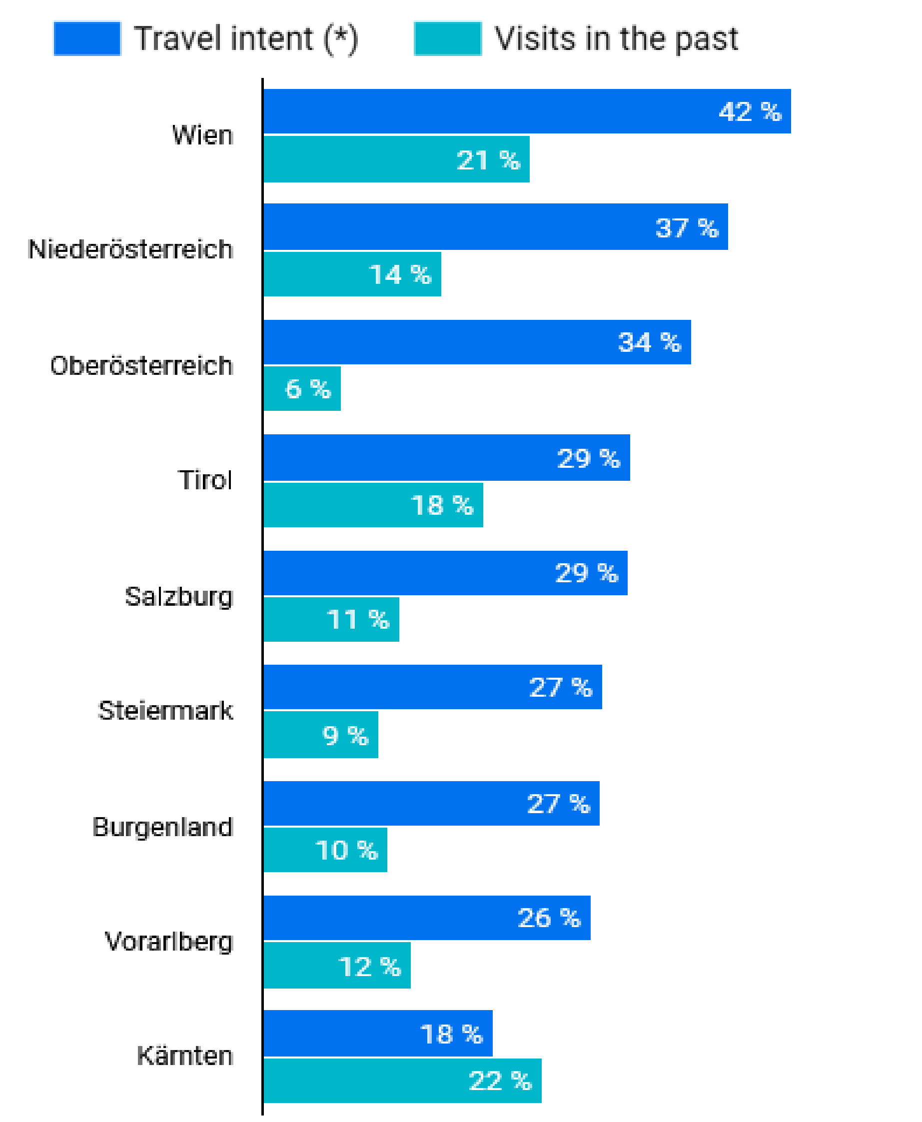
Assessing Luxembourg's **brand strength** as a destination



Source: LFT Brand & Potential Study 2023-2024,
except data for PL: Destination Brand/Inspektour (2021).

Regional origin 2024

Past visitors and future potential



Source: LFT Brand & Potential Study, 2024.

General theme interest (*)

Theme	Europe Rank	Austria Rank	Austria % interested
Culinary	2	**1**	74%
Nature	3	**2**	71%
Resting/Relaxation	1	**3**	71%
Sightseeing	4	**4**	70%
Immersive travel	6	**5**	69%
City	5	**6**	67%
Architecture/townscapes	7	**7**	67%
Fun/entertainment	8	**8**	65%
Family	12	**9**	61%
Exchanging with locals	13	**10**	60%
Castles	9	**11**	59%
History/Unesco	10	**12**	59%
Culture	11	**13**	59%
Learning/new skills	14	**14**	56%
Events	16	**15**	55%
Sustainability	15	**16**	55%
Hiking	17	**17**	53%
Nightlife (**)	20	**18**	53%
Adventure/action	19	**19**	52%
Travelling by train	18	**20**	49%
Active-sports	27	**21**	49%
Wellness	25	**22**	48%
Wine	21	**23**	47%
Countryside	22	**24**	44%
Shopping	23	**25**	43%
Cycling	31	**26**	43%
Luxury	24	**27**	43%
Remembrance	26	**28**	42%
Camping	29	**29**	39%
Industrial heritage	28	**30**	39%
Film locations	30	**31**	38%
MTB	32	**32**	32%
Motorcycling	33	**33**	29%

(*) 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).

Source: LFT Brand & Potential Study, 2024.

Luxembourg's Theme Competence (*)

Theme			
	Rank	**Rank**	% agreeing
Culinary	3	**1**	41%
City	1	**2**	41%
Architecture/townscapes	4	**3**	36%
Culture	6	**4**	33%
Castles	7	**5**	31%
Luxury	9	**5**	31%
Nature	5	**7**	31%
Resting/Relaxation	2	**8**	29%
Shopping	10	**9**	24%
Family	8	**10**	23%
History/Unesco	12	**11**	22%
Fun/entertainment	13	**12**	22%
Nightlife (**)	14	**13**	22%
Wine	15	**14**	20%
Active-sports	21	**15**	19%
Hiking	11	**16**	19%
Events	23	**17**	18%
Cycling	20	**18**	18%
Wellness	16	**19**	18%
Sustainability	18	**20**	17%
Adventure/action	22	**21**	15%
Remembrance	26	**22**	15%
Countryside	17	**23**	15%
Camping	19	**24**	14%
Industrial heritage	24	**25**	14%
MTB	25	**26**	10%

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

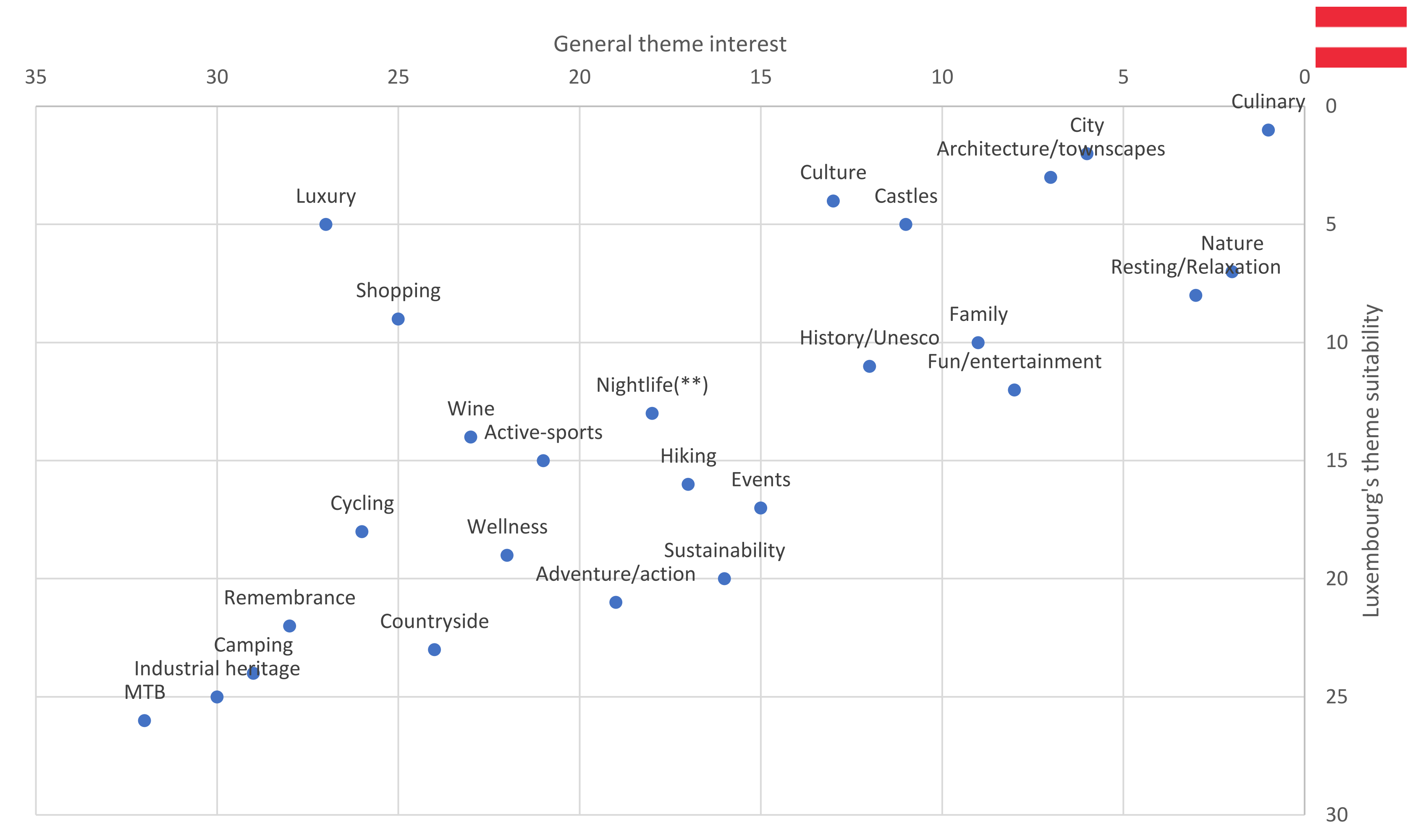
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

(**) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters).

Source: LFT Brand & Potential Study, 2024.

Theme interest & Luxembourg's Theme Competence (*)

Theme ranking by source market interest and Luxembourg's perceived suitability



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

(**) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters).

Source: LFT Brand & Potential Study, 2024.

Luxembourg’s Brand Value Ratings (*)

Feature			
	Rank	**Rank**	% agreeing
safe	1	**1**	42%
of high quality	3	**2**	39%
clean	2	**3**	37%
welcoming, hospitable	4	**4**	33%
open-minded, tolerant, international	6	**5**	32%
exclusive, luxurious	8	**6**	31%
authentic, real	5	**7**	30%
attractive, appealing	7	**8**	25%
varied, diversified	12	**9**	25%
dynamic, modern	9	**10**	25%
service oriented	10	**11**	22%
lively, trendy	13	**12**	20%
not overcrowded / insider tip	14	**13**	20%
surprising	11	**14**	18%
sustainable	15	**15**	16%
affordable	16	**16**	10%

(*) 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.

Source: LFT Brand & Potential Study, 2024.

Spontaneous associations with Luxembourg

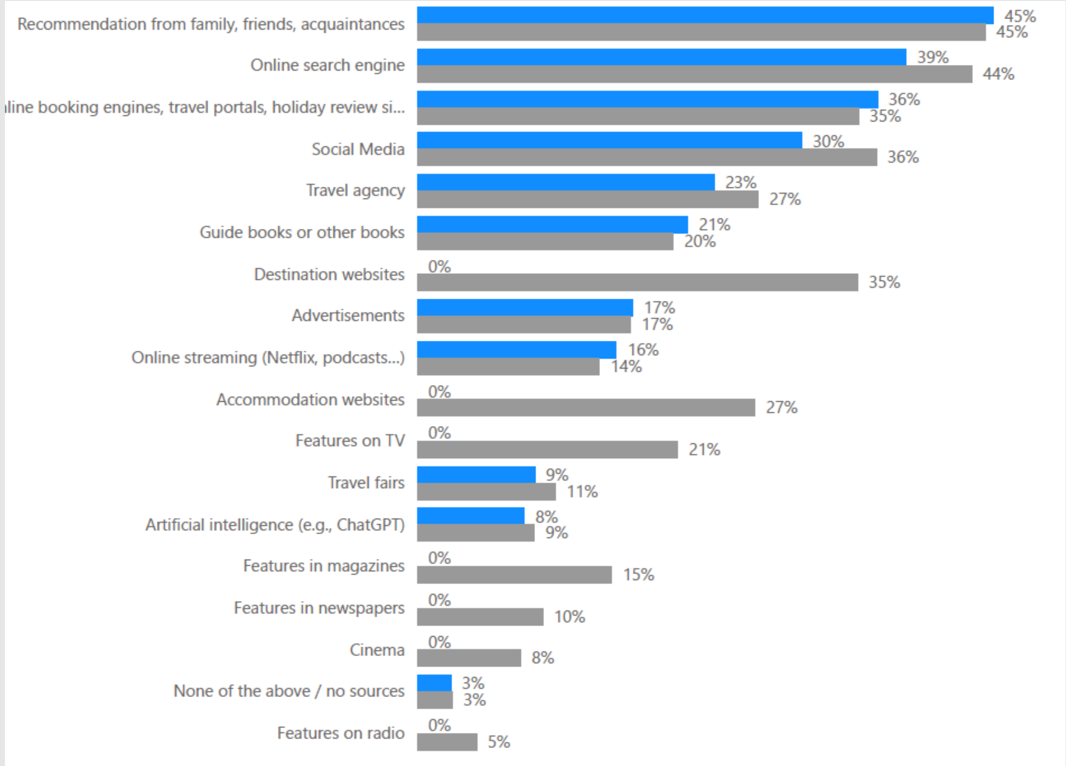
Source: LFT Brand & Potential Study, 2024.

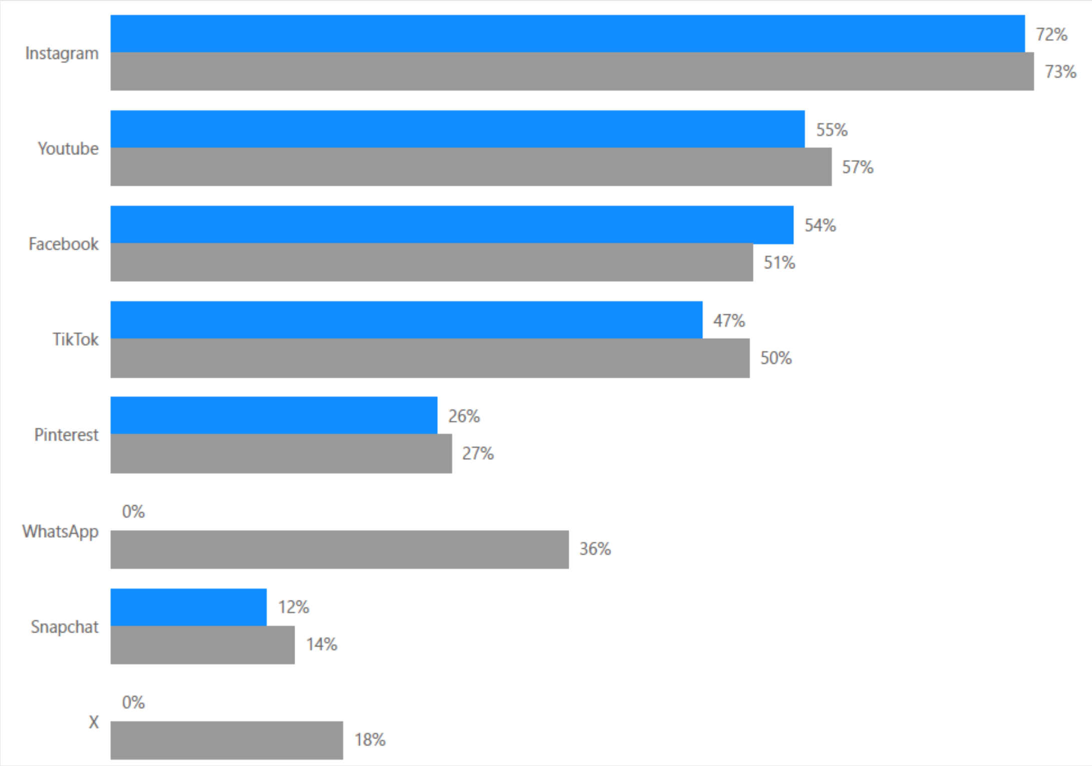
Trip organisation and preferences (1)

— Average **European source markets**, total vs. Austria

Austria
All inbound

Preferred sources of travel inspiration





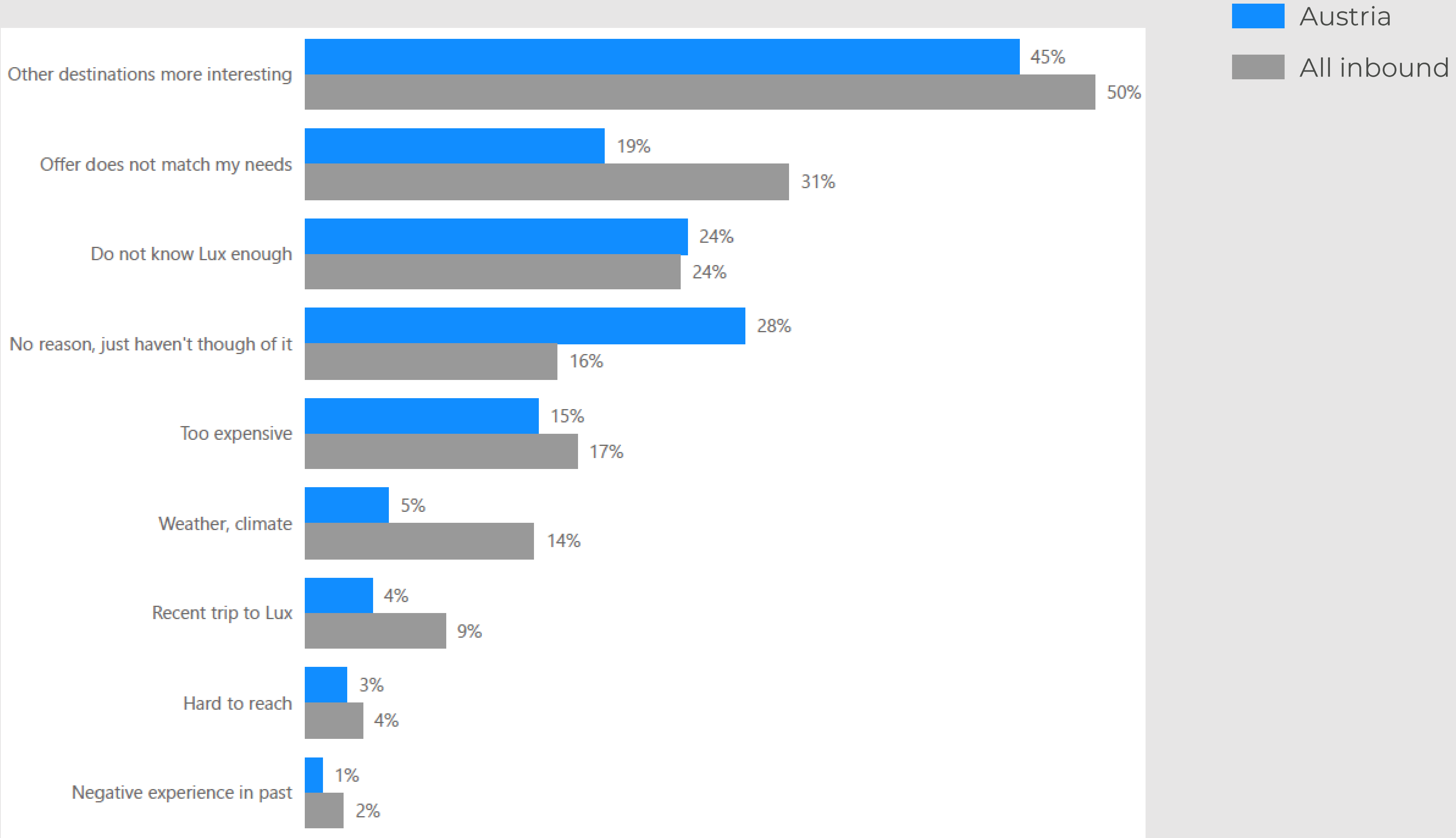
Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent to Luxembourg)

Source: LFT Brand & Potential Study, 2024.

Trip organisation and preferences (2)

— Average **European source markets**, total vs. Austria

Reasons for not considering Luxembourg as a destination

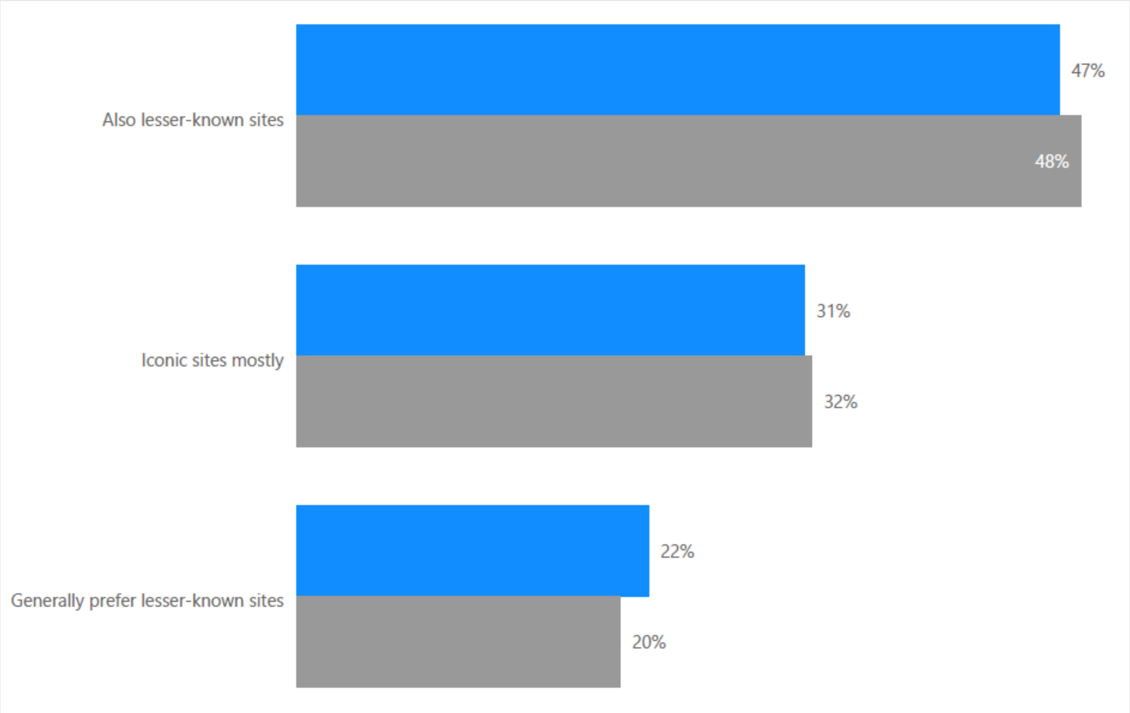


Source: LFT Brand & Potential Study, 2024.

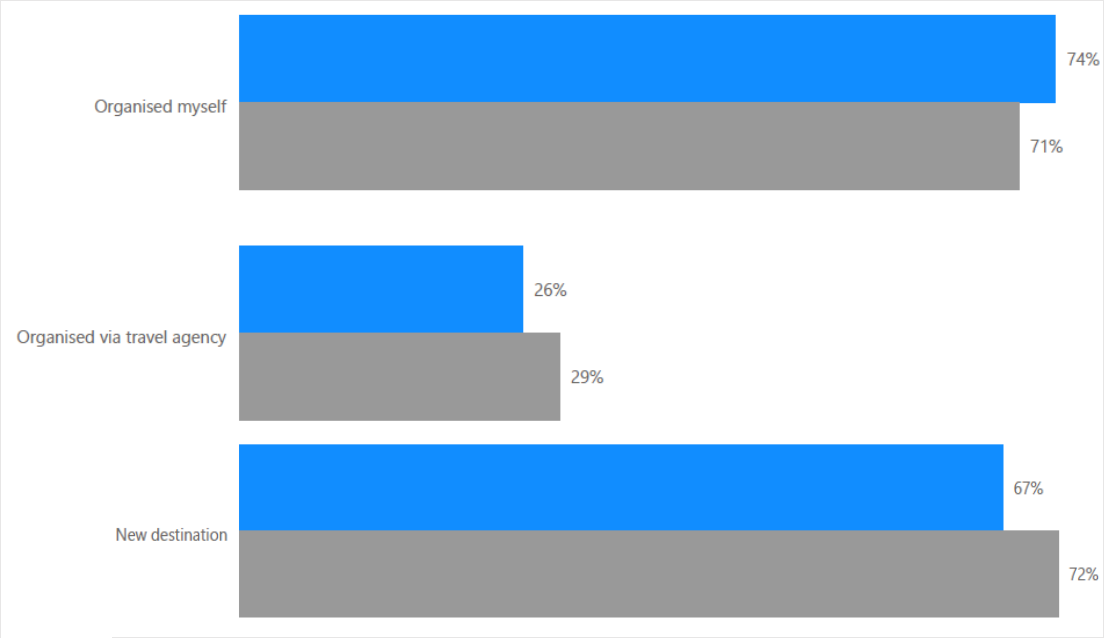
Trip organisation and preference (3)

— Average **European source markets**, total vs. Austria

General preference for visiting iconic vs. lesser-known sites



Self-organisation (*), new destination (**)



Austria

All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.

Your contact

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