



Luxembourg for Tourism

Market profile DENMARK & SWEDEN

2024



Economic indicators & General Travel Demand

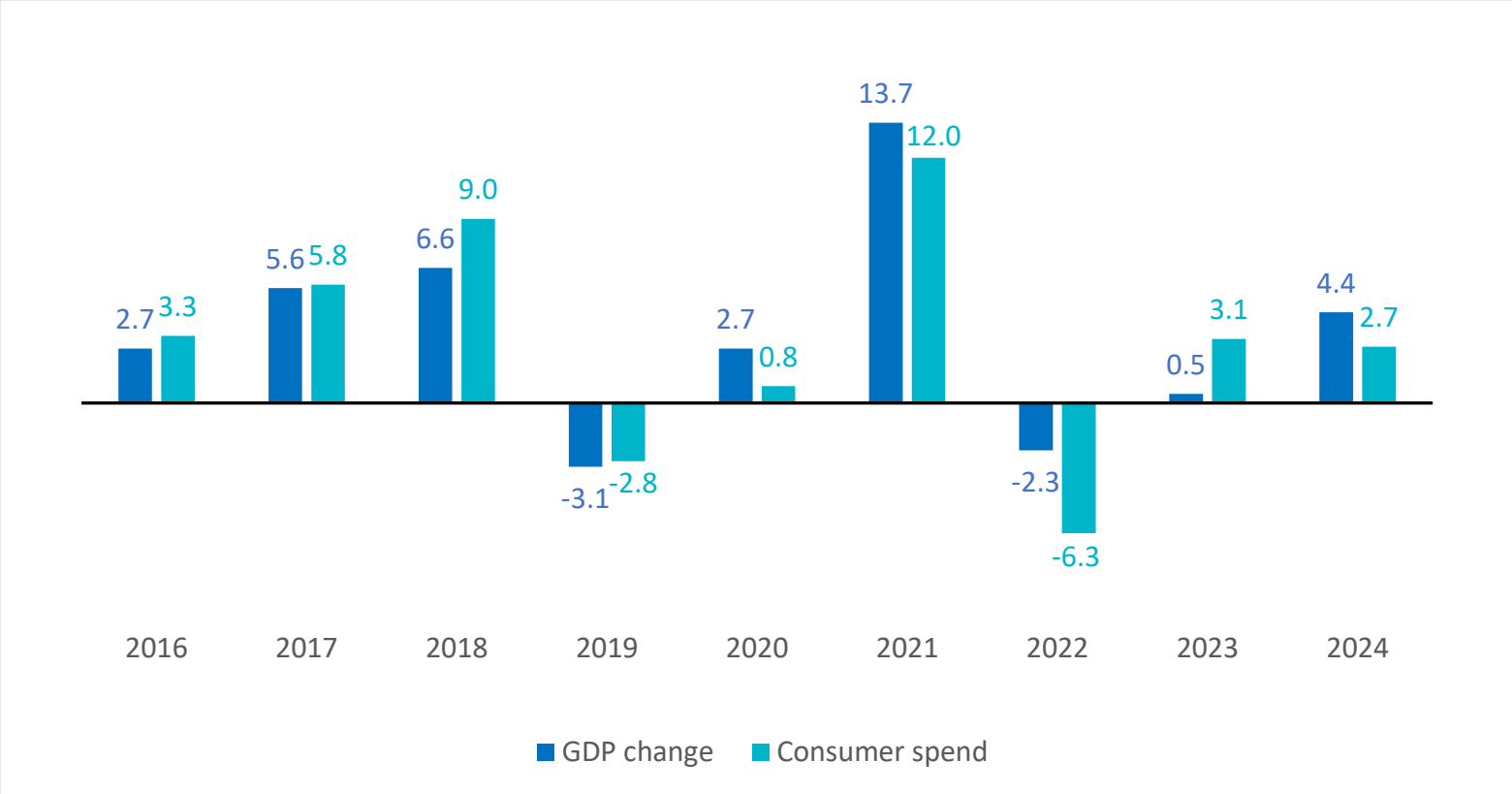


Economic indicators – General travel demand



GDP and consumer spending, % annual change

Economy & population



GDP (\$) per capita
71,009.14

Unemployment (%)
2.90

Inflation(%)
1.37

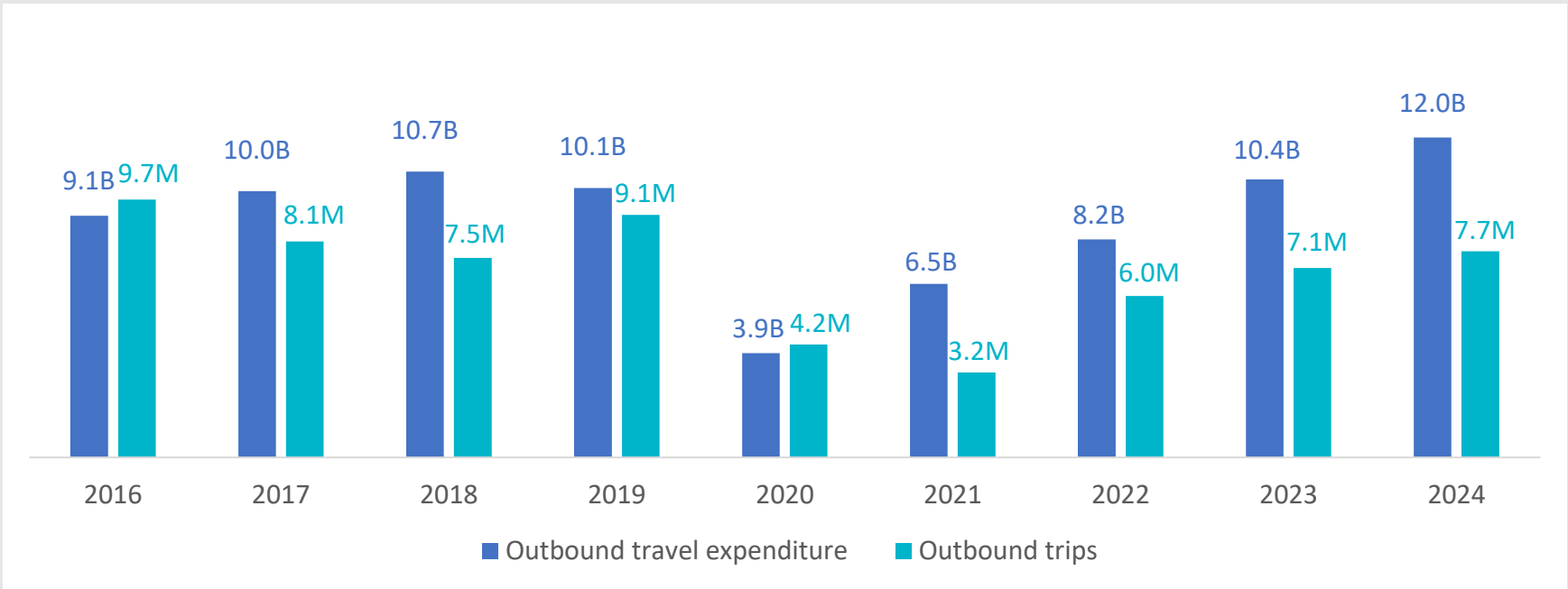
Population
5,978,460



Economic indicators – General travel demand



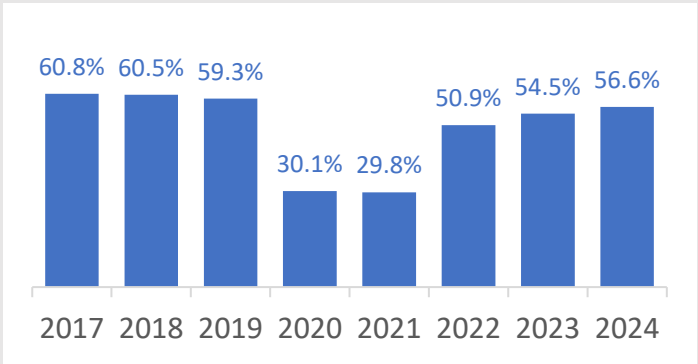
Outbound trips and travel expenditure



Outbound travel intensity
1.29 trips
per inhabitant (2024)

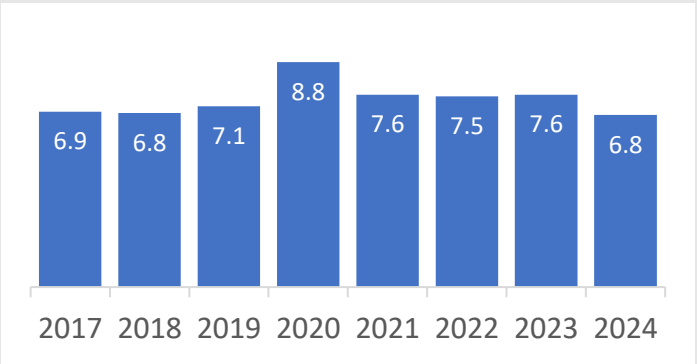
Average spend
per outbound trip (2024)
1,552 \$

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2024)
80.6%

Average length of stay, nights, all outbound trips



Share of short trips
(1-3 nights),
% all outbound
trips (2024)
29.4%

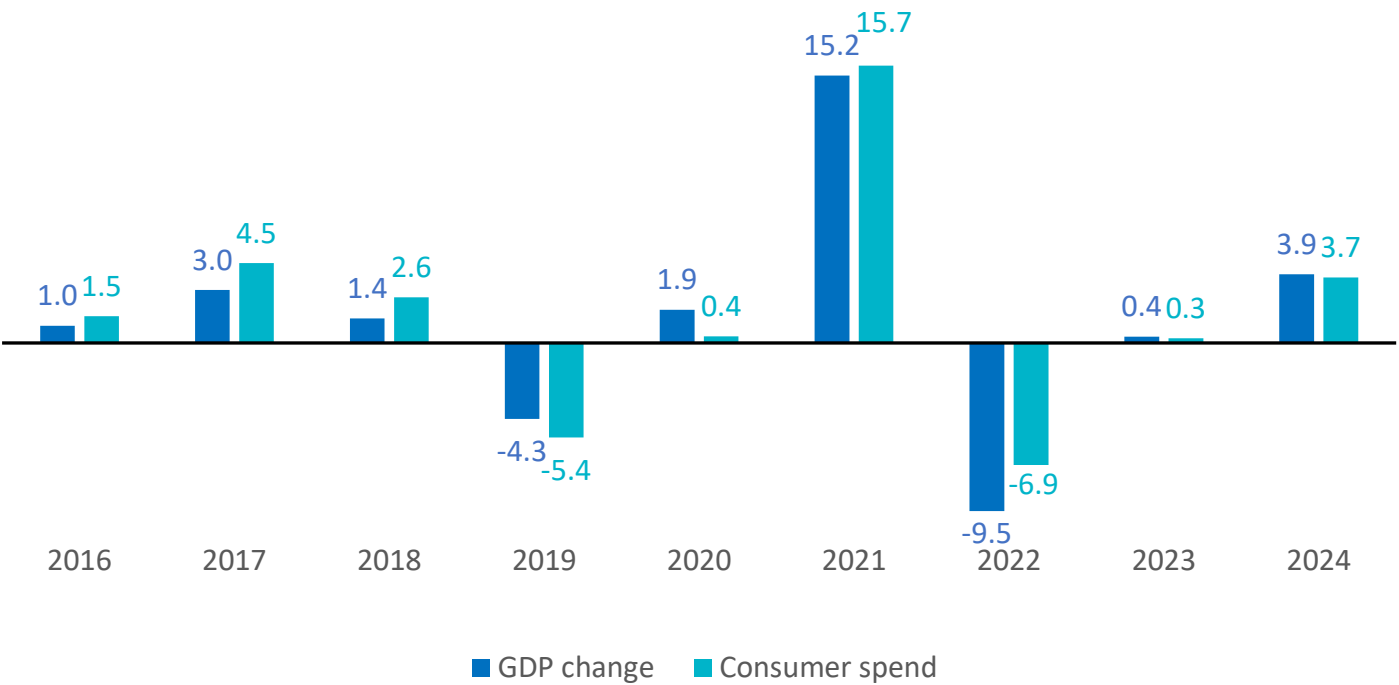


Economic indicators – General travel demand



GDP and consumer spending, % annual change

Economy & population



GDP (\$) per capita
57,090.25

Unemployment (%)
8.37

Inflation(%)
2.84

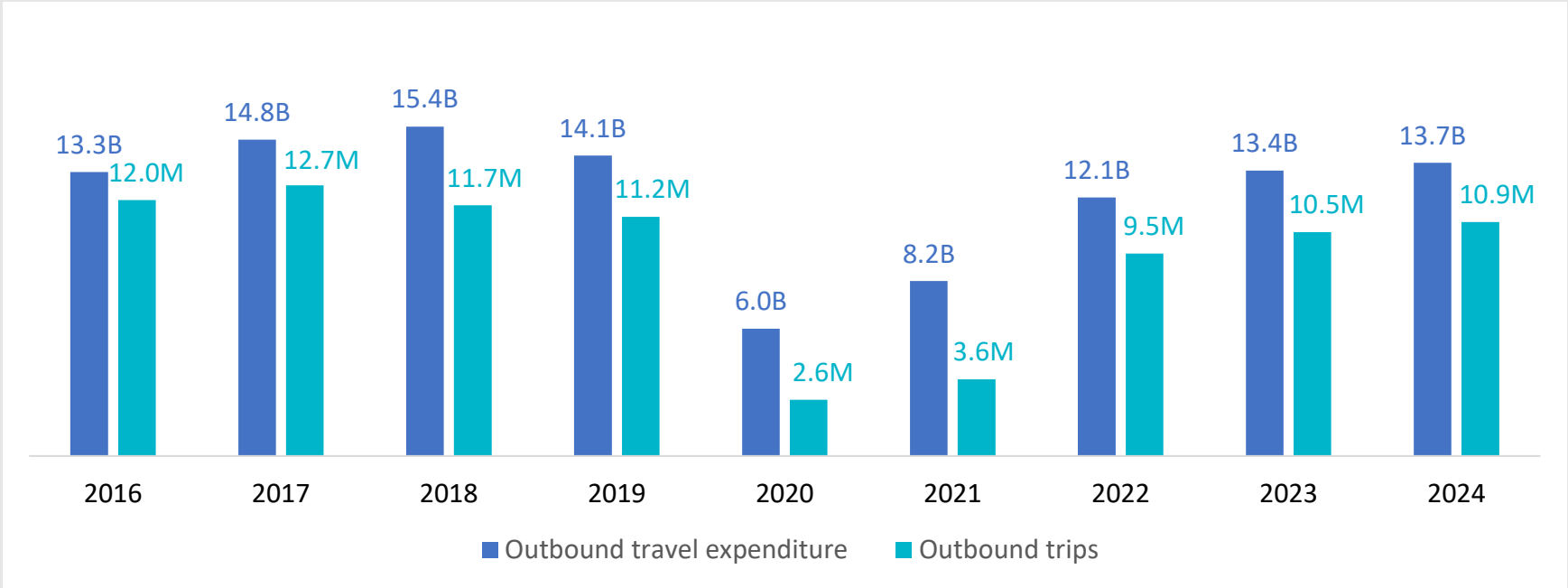
Population
10,567,300



Economic indicators – General travel demand



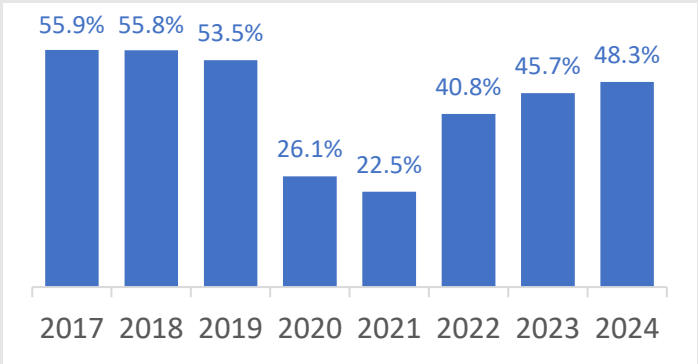
Outbound trips and travel expenditure



Outbound travel intensity
1.04 trips
per inhabitant (2024)

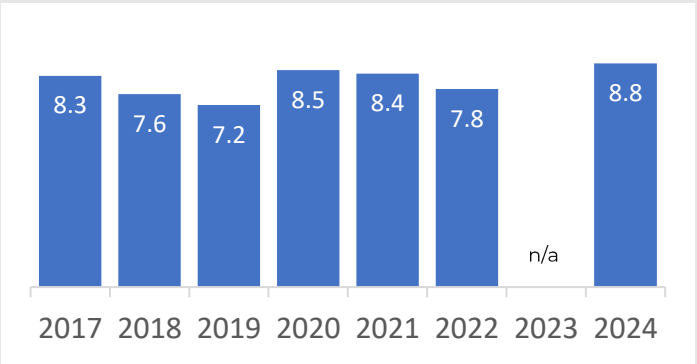
Average spend
per outbound trip (2024)
1,252 \$

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2024)
85.1%

Average length of stay, nights, all outbound trips



Share of short trips
(1-3 nights),
% all outbound
trips (2024)
32.0%



Arrivals & nights in paid accommodation



Nights in paid accommodation

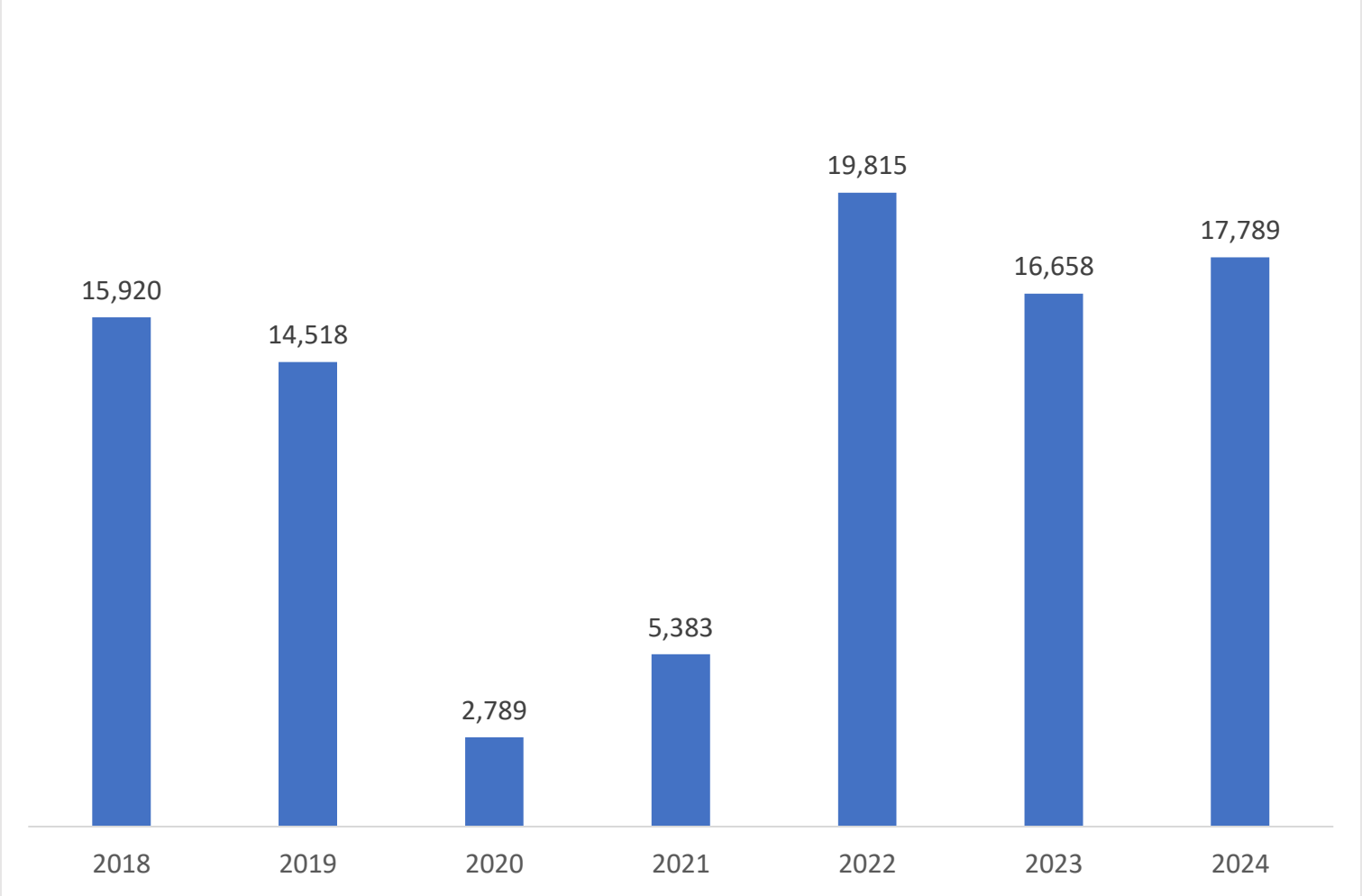
2024 and 2018-2024



Nights,
paid accommodation, 2024



+7% (vs. 2023)
+23% (vs. 2019)





Arrivals in paid accommodation

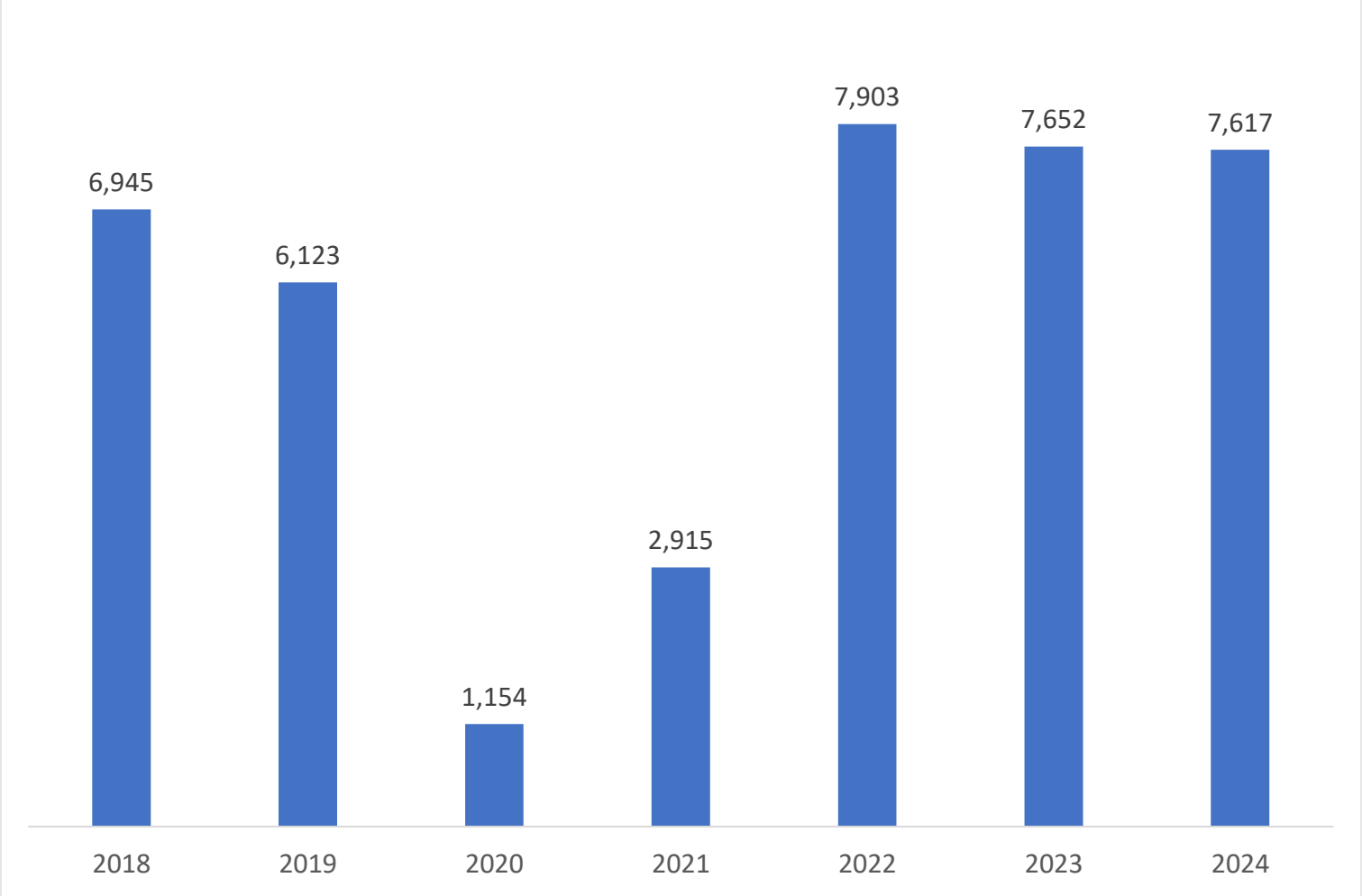
2024 and 2018-2024



Arrivals,
paid accommodation, 2024



+0% (vs. 2023)
+24% (vs. 2019)





Length of stay, paid accommodation

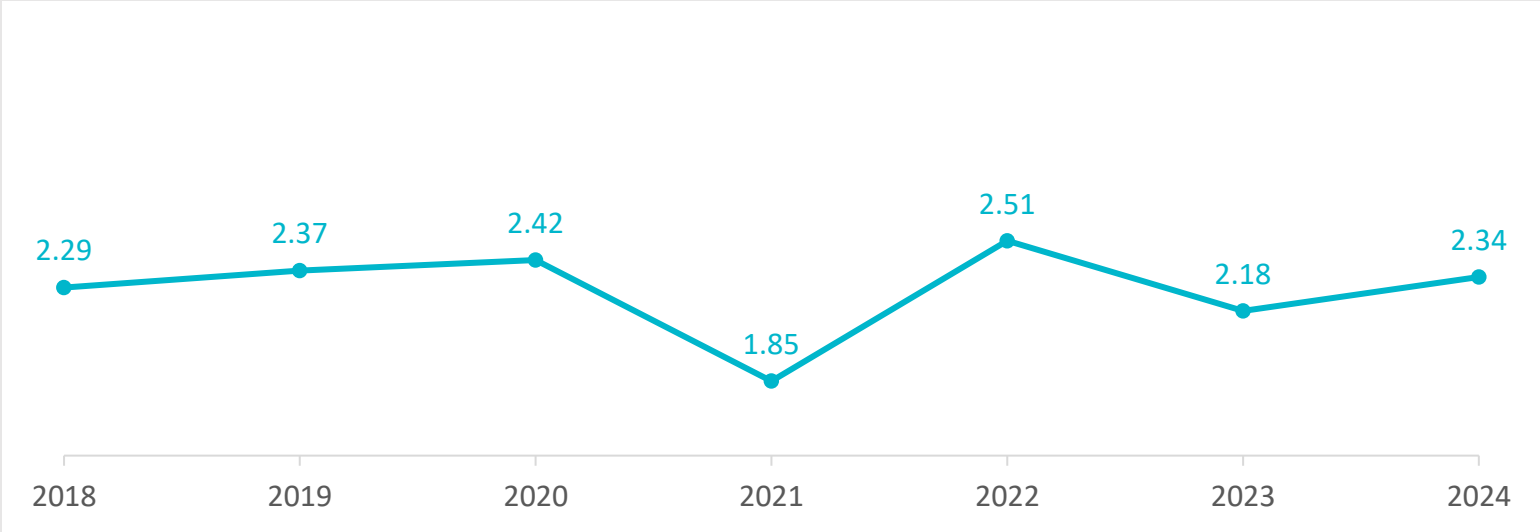
2024 and 2018-2024



Average length of stay,
paid accommodation, 2024



+0.16 nights (vs. 2023)
-0.03 nights (vs. 2019)



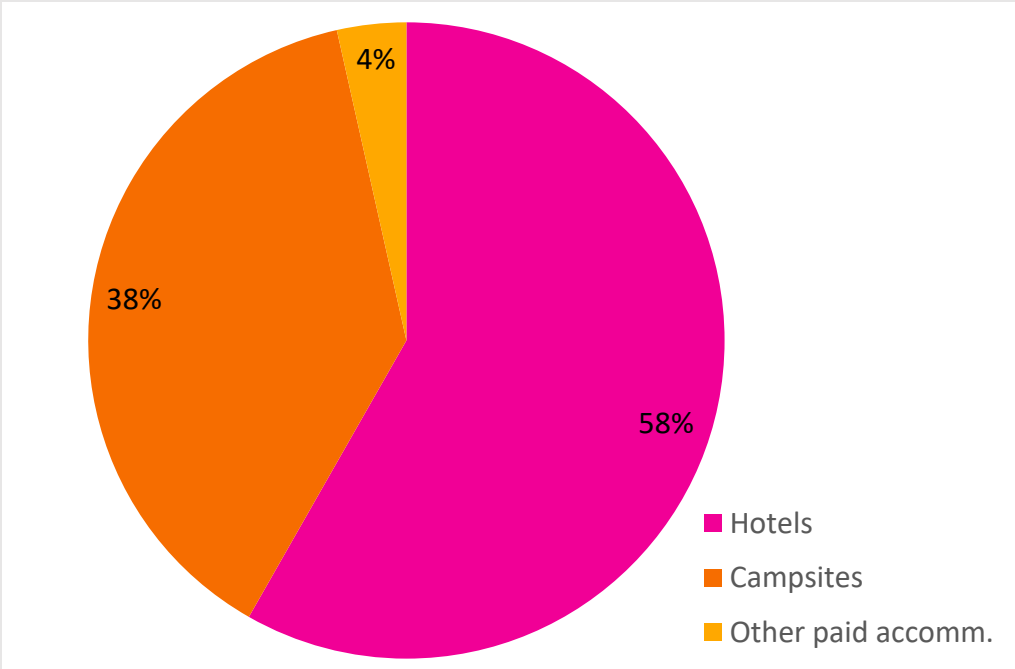


Nights & arrivals in paid accommodation

Type of accommodation, 2024

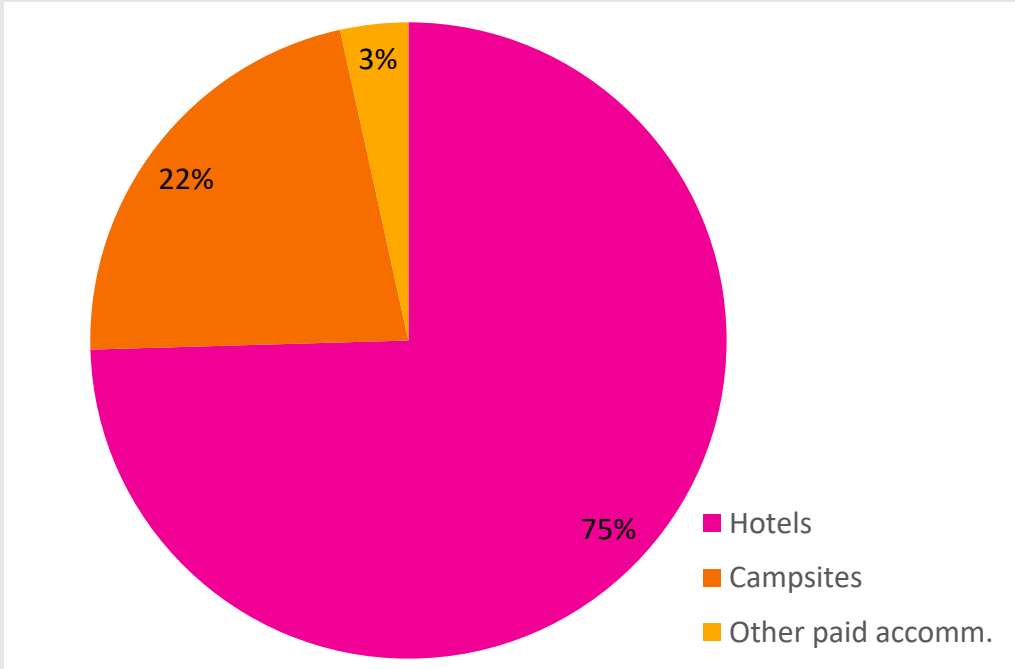


Nights,
paid accommodation, 2024



Hotels	10.361	-1% (vs. 2023)	+28% (vs. 2019)
Campsites	6.803	+29% (vs. 2023)	+28% (vs. 2019)
Other paid accomm.	625	-31% (vs. 2023)	-45% (vs. 2019)

Arrivals,
paid accommodation, 2024



Hotels	5.678	-2% (vs. 2023)	+28% (vs. 2019)
Campsites	1.676	+13% (vs. 2023)	+17% (vs. 2019)
Other paid accomm.	263	-30% (vs. 2023)	-4% (vs. 2019)

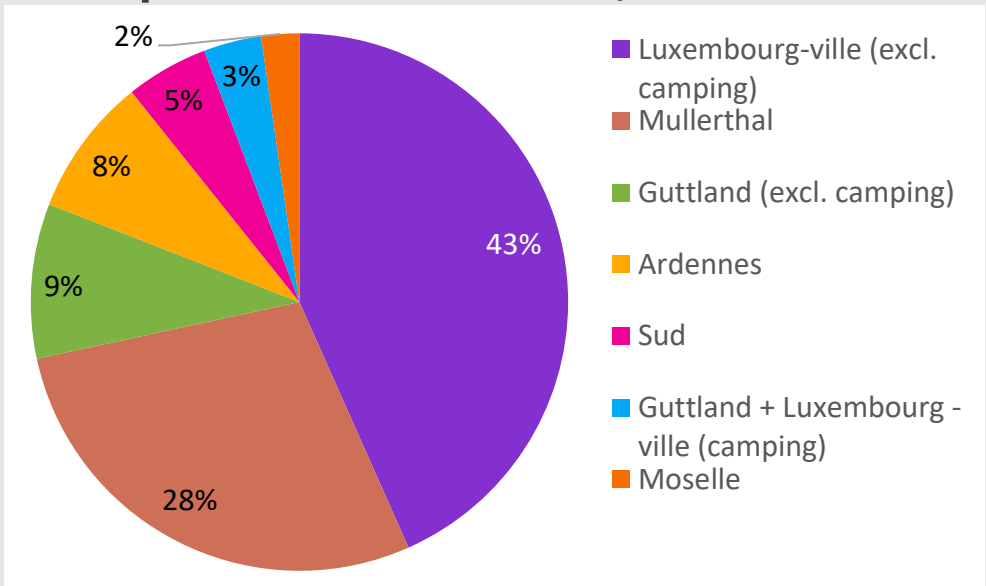


Nights & arrivals in paid accommodation

Regions, 2024

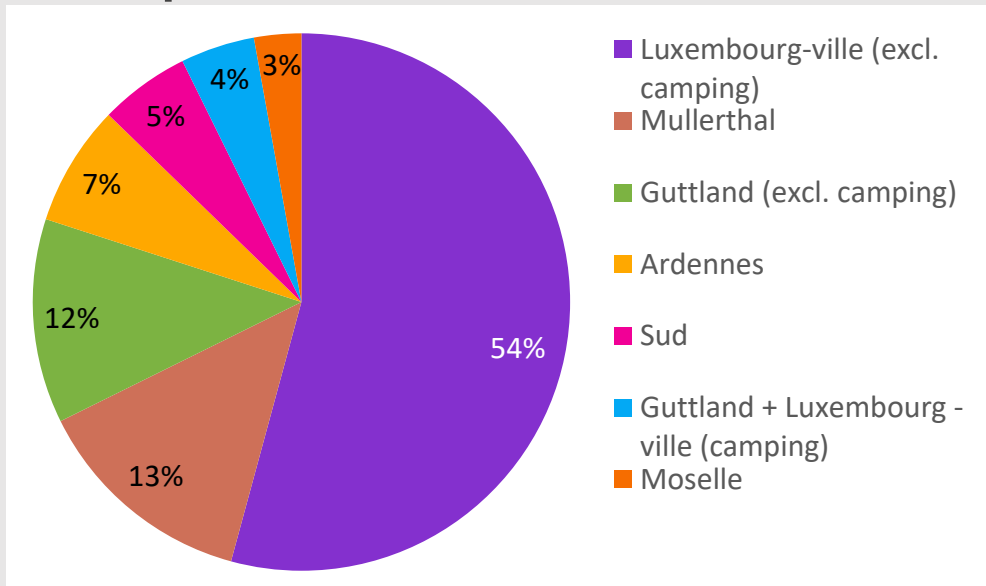


Nights, paid accommodation, 2024



Lux.-City (excl. camping)	7.711	+5% (vs. 2023)	+29% (vs. 2019)
MPSL	5.028	+31% (vs. 2023)	+25% (vs. 2019)
Guttland (excl. camping)	1.657	-3% (vs. 2023)	+35% (vs. 2019)
Eislek	1.485	+13% (vs. 2023)	+51% (vs. 2019)
South	883	+13% (vs. 2023)	-1% (vs. 2019)
Guttland/Lux.-City (camping)	618	-42% (vs. 2023)	-26% (vs. 2019)
Moselle	407	-36% (vs. 2023)	-29% (vs. 2019)

Arrivals, paid accommodation, 2024



Lux.-City (excl. camping)	4.130	+4% (vs. 2023)	+44% (vs. 2019)
MPSL	1.026	+28% (vs. 2023)	+24% (vs. 2019)
Guttland (excl. camping)	937	-8% (vs. 2023)	+38% (vs. 2019)
Eislek	554	+6% (vs. 2023)	+36% (vs. 2019)
South	414	-12% (vs. 2023)	-31% (vs. 2019)
Guttland/Lux.-City (camping)	340	-37% (vs. 2023)	-29% (vs. 2019)
Moselle	216	-35% (vs. 2023)	-15% (vs. 2019)

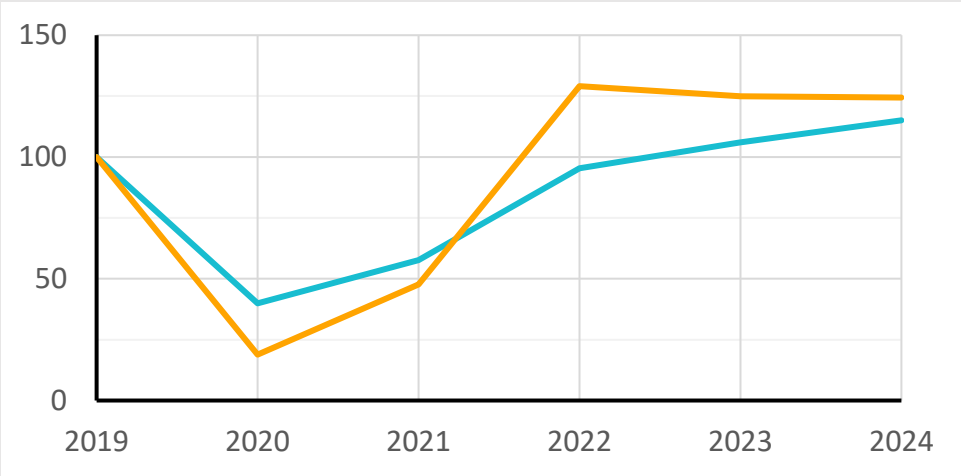


Arrivals in paid accommodation

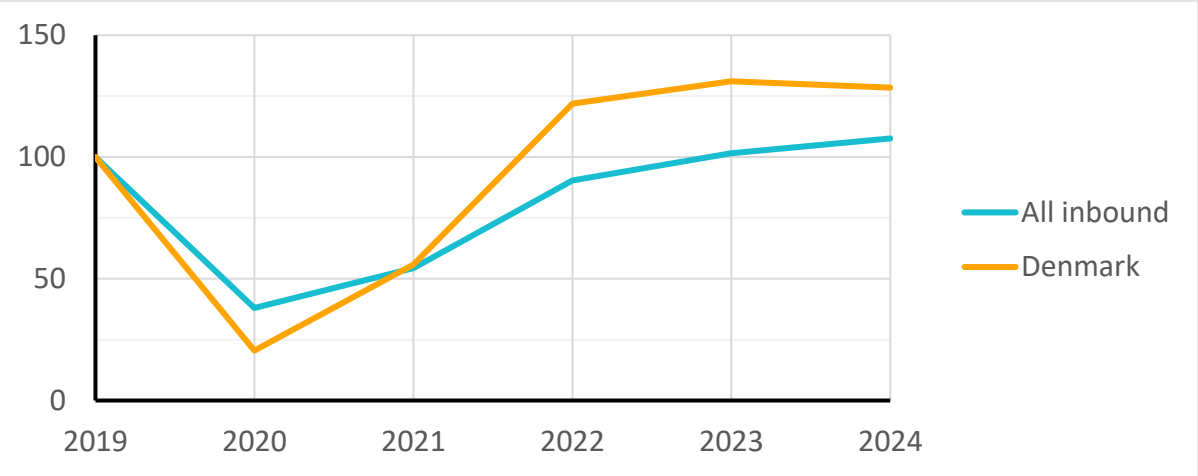
Trends 2019-2024



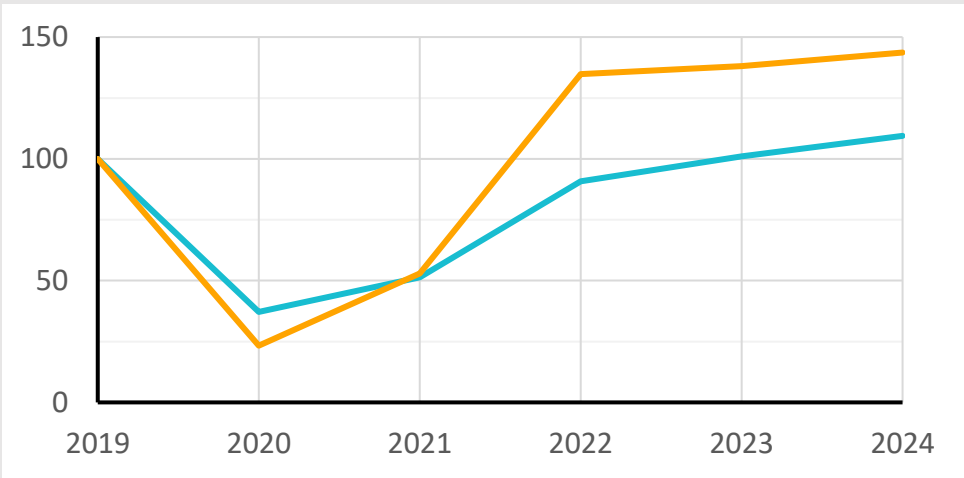
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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



(*) excluding camping.
Source: Statec



Short-term rentals

2024 and 2018-2024

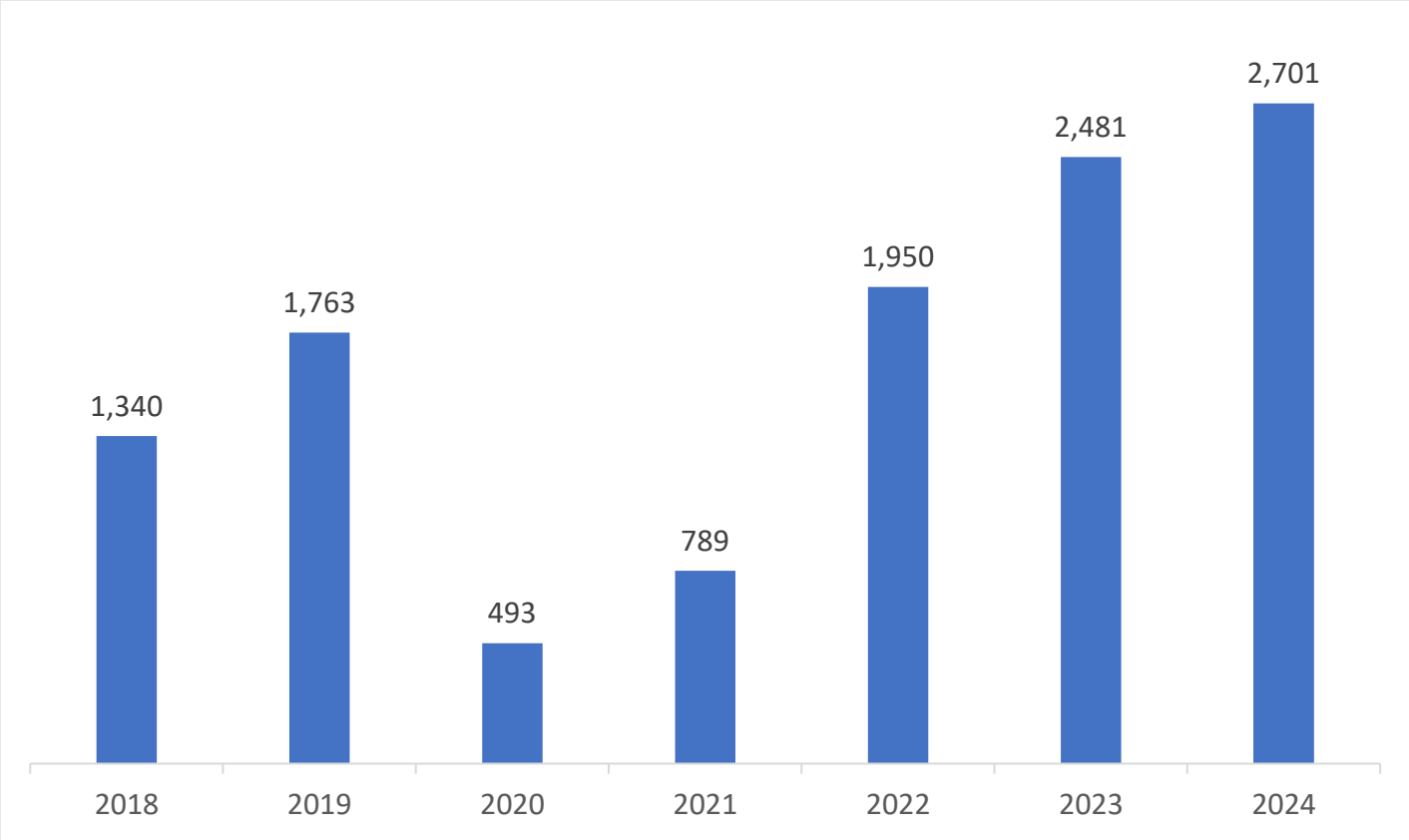
Nights,
Short-term rentals, 2024



9% (vs. 2023)

53% (vs. 2019)

Nights,
Short-term rentals, 2018-2024





Nights in paid accommodation

2024 and 2018-2024

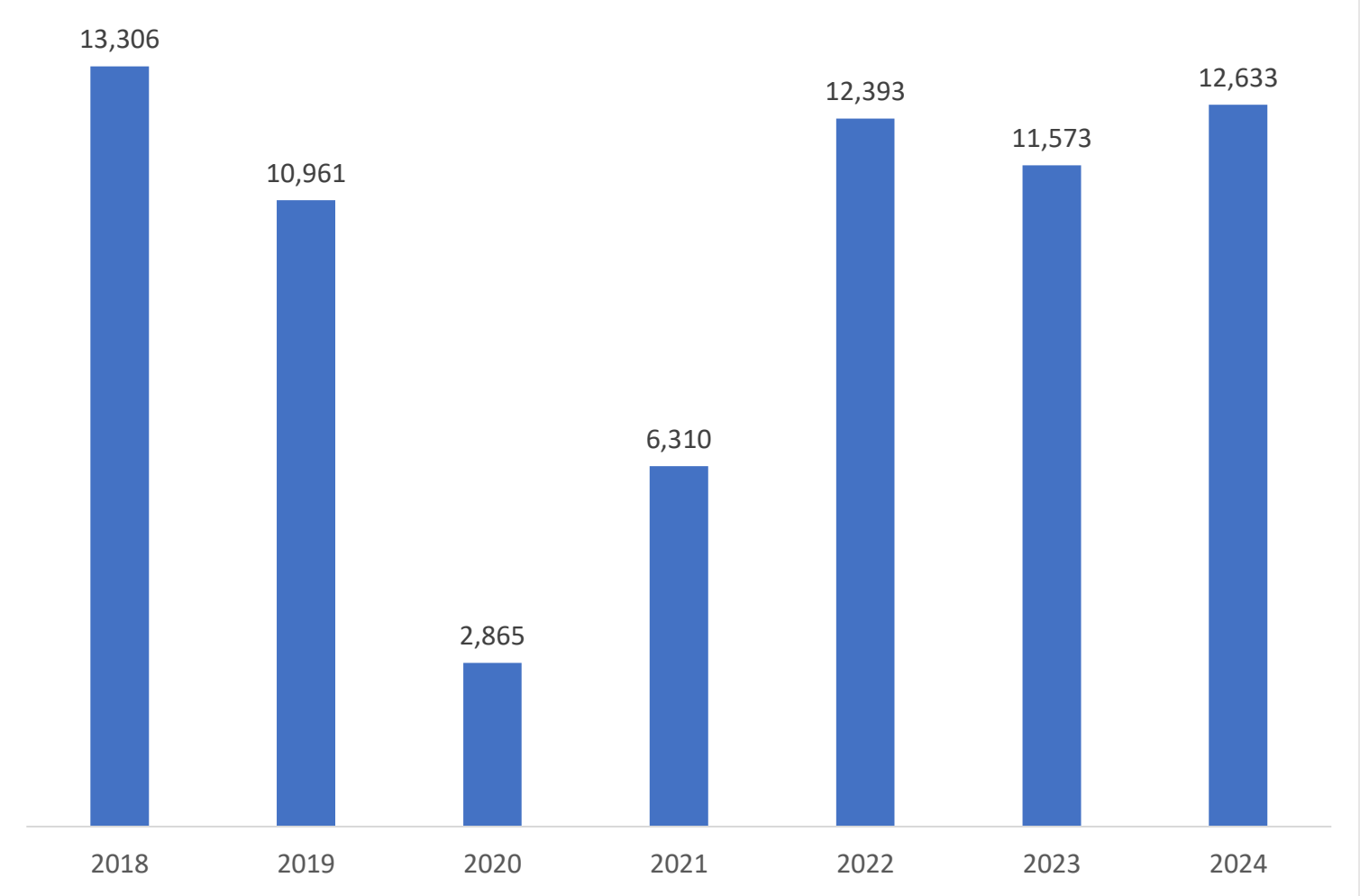


**Nights,
paid accommodation, 2024**



+9% (vs. 2023)

+15% (vs. 2019)





Arrivals in paid accommodation

2024 and 2018-2024

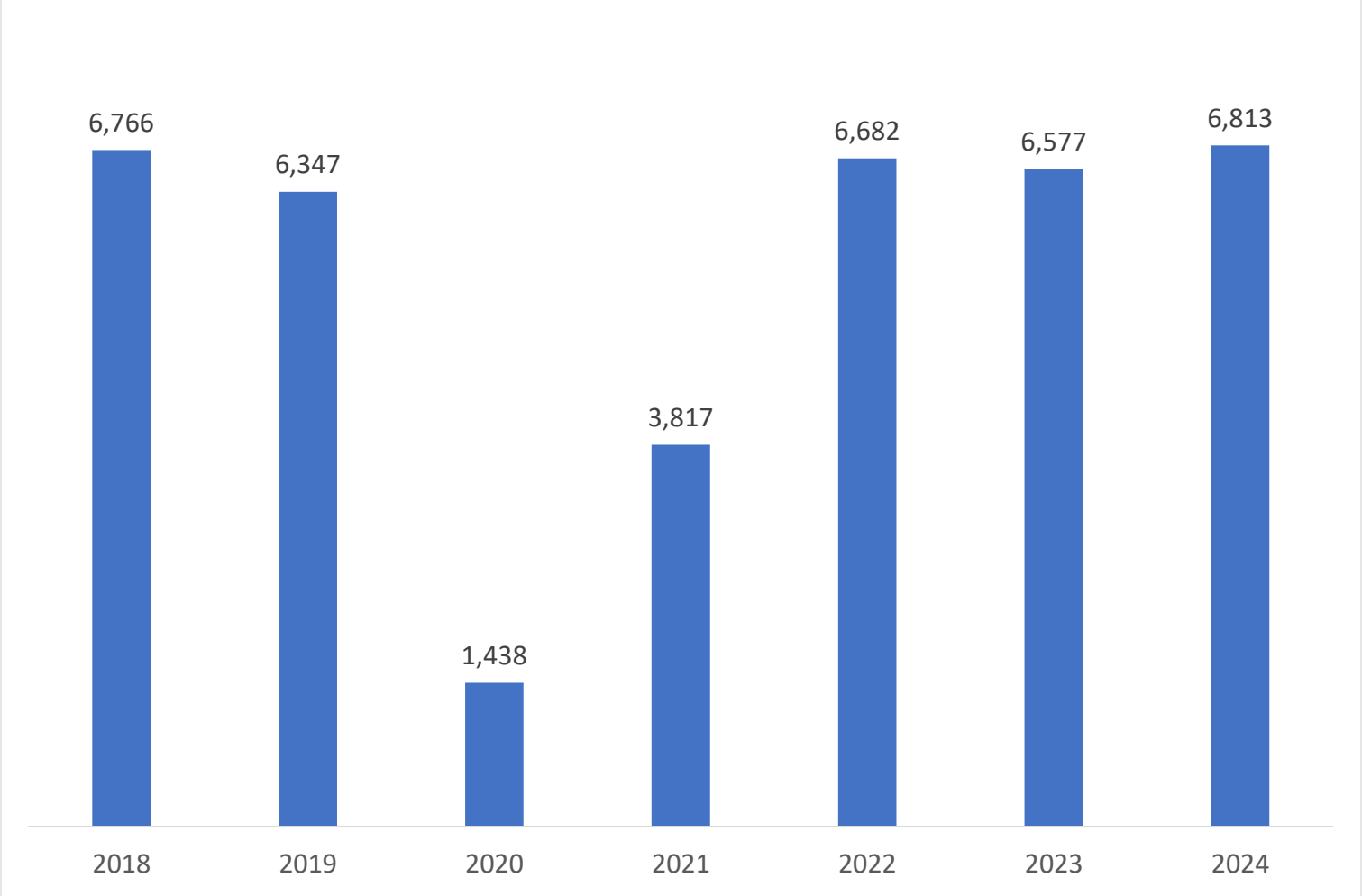


Arrivals,
paid accommodation, 2024



+4% (vs. 2023)

+7% (vs. 2019)





Length of stay, paid accommodation

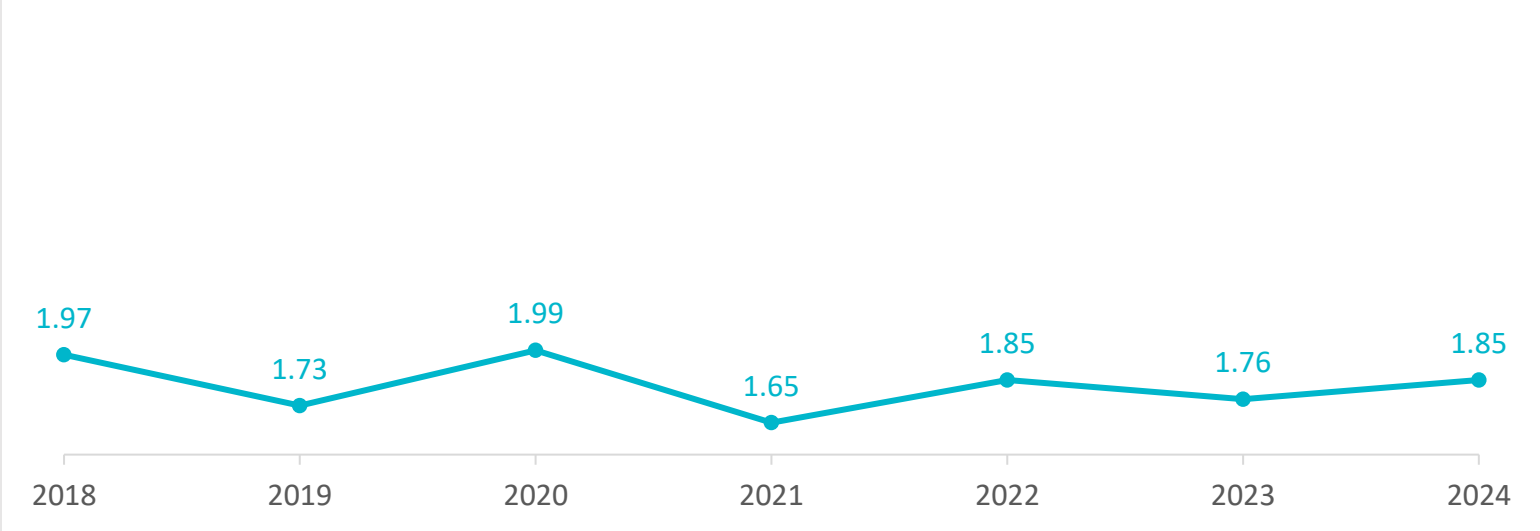
2024 and 2018-2024



Average length of stay,
paid accommodation, 2024



+0.09 nights (vs. 2023)
+0.12 nights (vs. 2019)



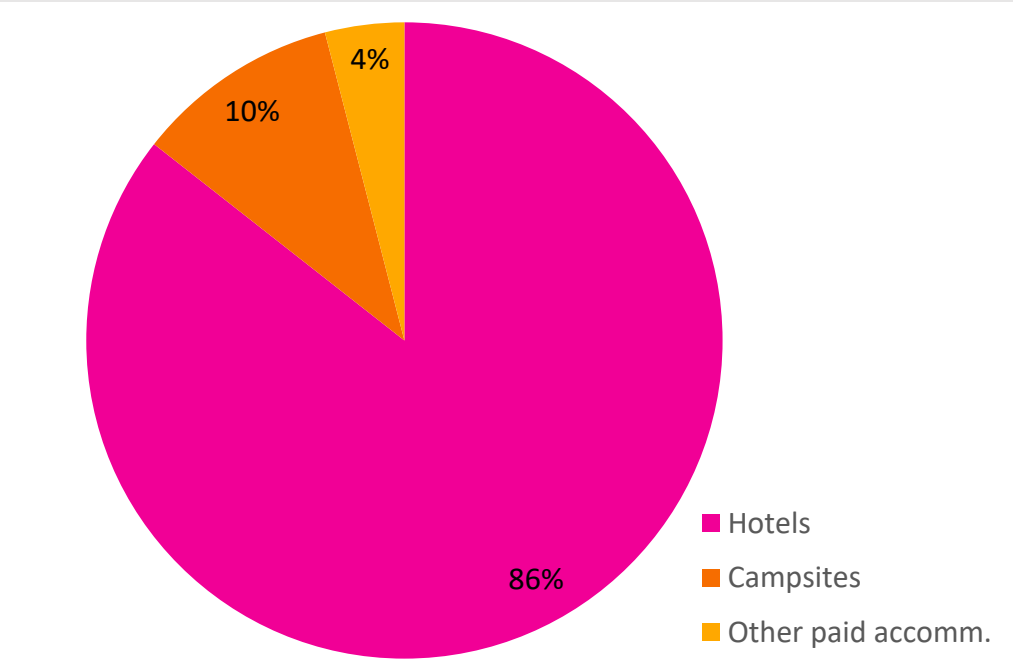


Nights & arrivals in paid accommodation



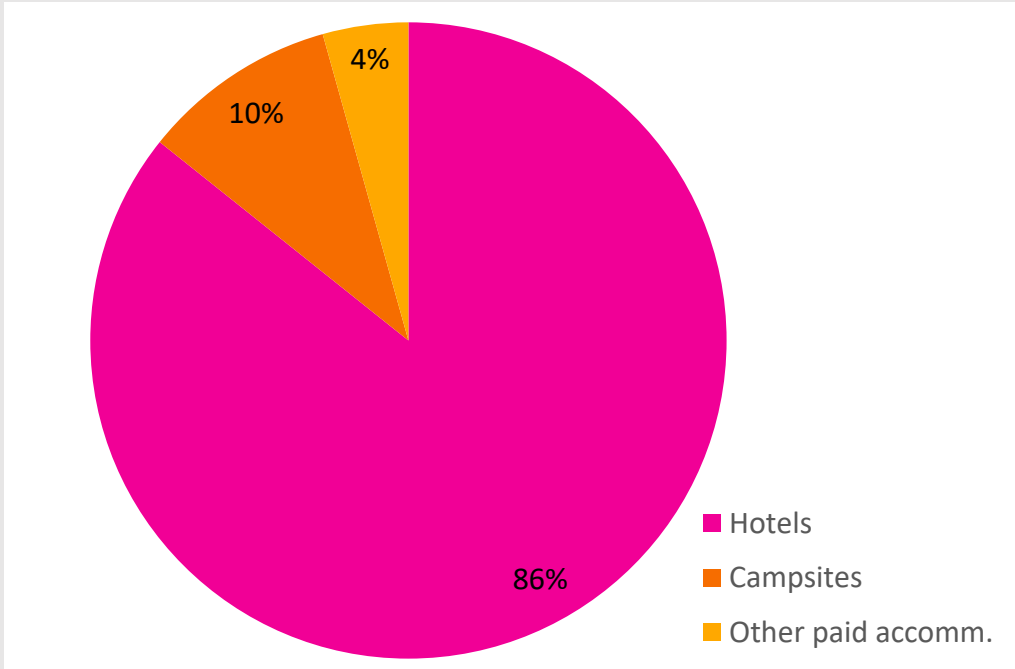
Type of accommodation, 2024

Nights,
paid accommodation, 2024



Hotels	10.812	+12% (vs. 2023)	+20% (vs. 2019)
Campsites	1.313	-5% (vs. 2023)	+9% (vs. 2019)
Other paid accomm.	508	+1% (vs. 2023)	-32% (vs. 2019)

Arrivals,
paid accommodation, 2024



Hotels	5.840	+6% (vs. 2023)	+10% (vs. 2019)
Campsites	677	-18% (vs. 2023)	-15% (vs. 2019)
Other paid accomm.	296	+13% (vs. 2023)	+33% (vs. 2019)

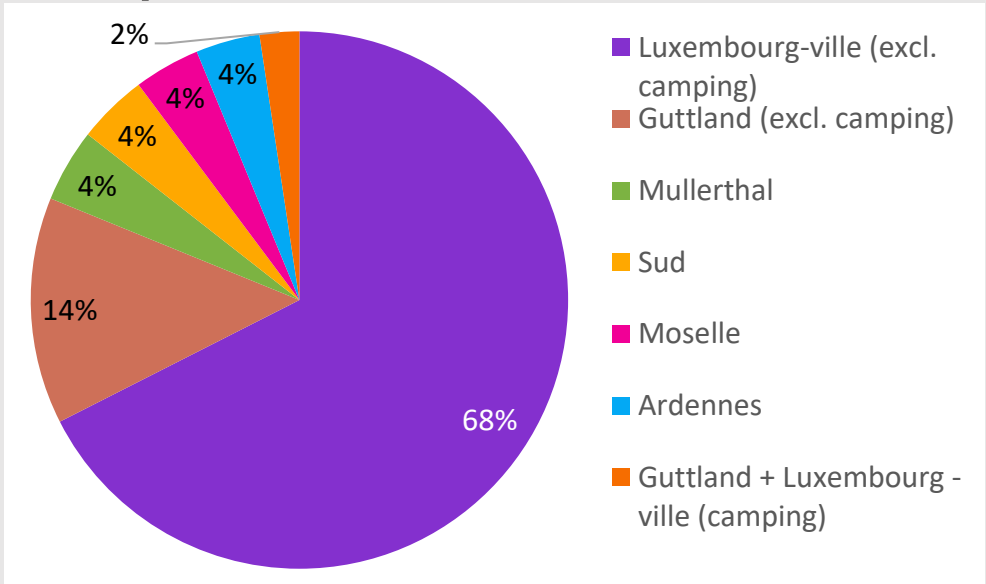


Nights & arrivals in paid accommodation

Regions, 2024

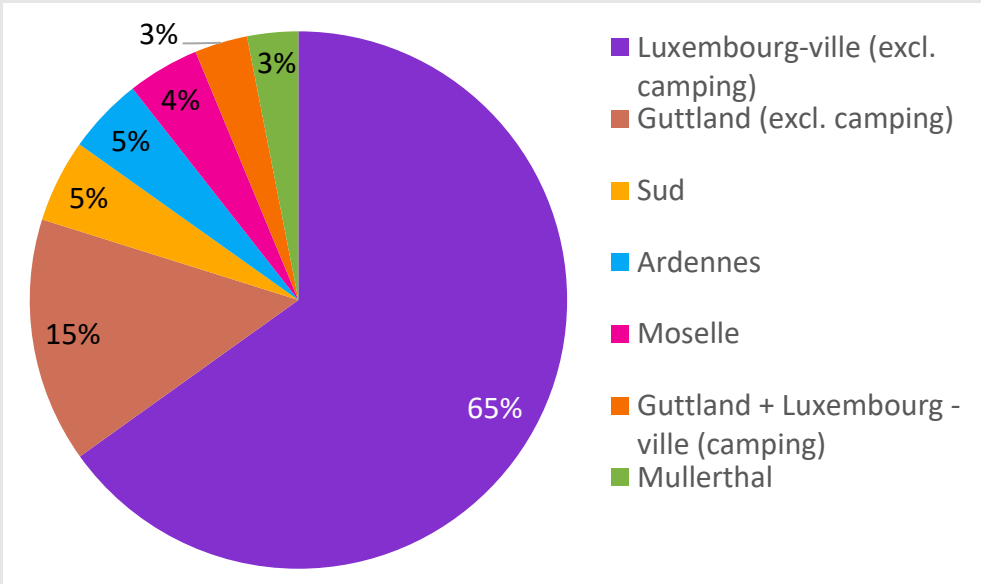


Nights,
paid accommodation, 2024



Lux.-City (excl. camping)	8.530	+14% (vs. 2023)	+19% (vs. 2019)
Guttland (excl. camping)	1.724	+24% (vs. 2023)	+55% (vs. 2019)
MPSL	556	+50% (vs. 2023)	+80% (vs. 2019)
South	533	-19% (vs. 2023)	-38% (vs. 2019)
Moselle	502	+40% (vs. 2023)	+54% (vs. 2019)
Eislek	487	-12% (vs. 2023)	+5% (vs. 2019)
Guttland/Lux.-City (camping)	301	-61% (vs. 2023)	-57% (vs. 2019)

Arrivals,
paid accommodation, 2024



Lux.-City (excl. camping)	4.436	+9% (vs. 2023)	+13% (vs. 2019)
Guttland (excl. camping)	1.004	+21% (vs. 2023)	+31% (vs. 2019)
South	340	-19% (vs. 2023)	-32% (vs. 2019)
Eislek	312	+0% (vs. 2023)	+5% (vs. 2019)
Moselle	295	+3% (vs. 2023)	+48% (vs. 2019)
Guttland/Lux.-City (camping)	217	-56% (vs. 2023)	-54% (vs. 2019)
MPSL	209	+19% (vs. 2023)	+6% (vs. 2019)

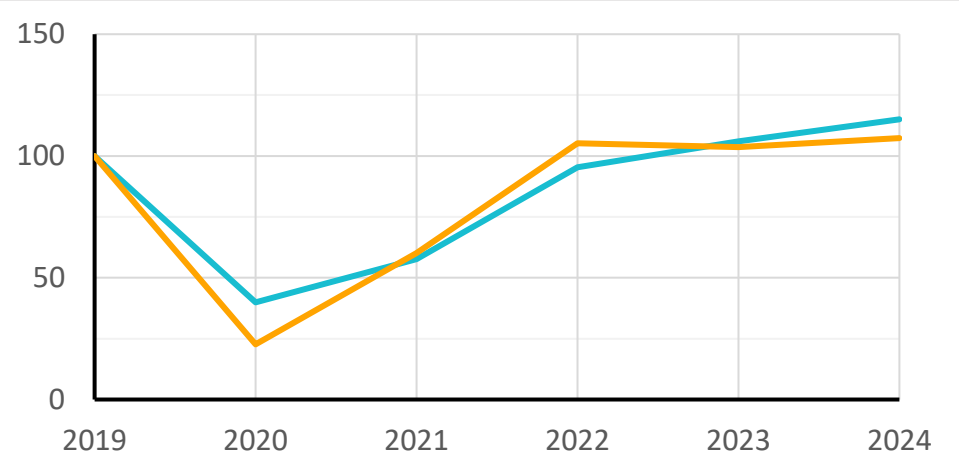


Arrivals in paid accommodation

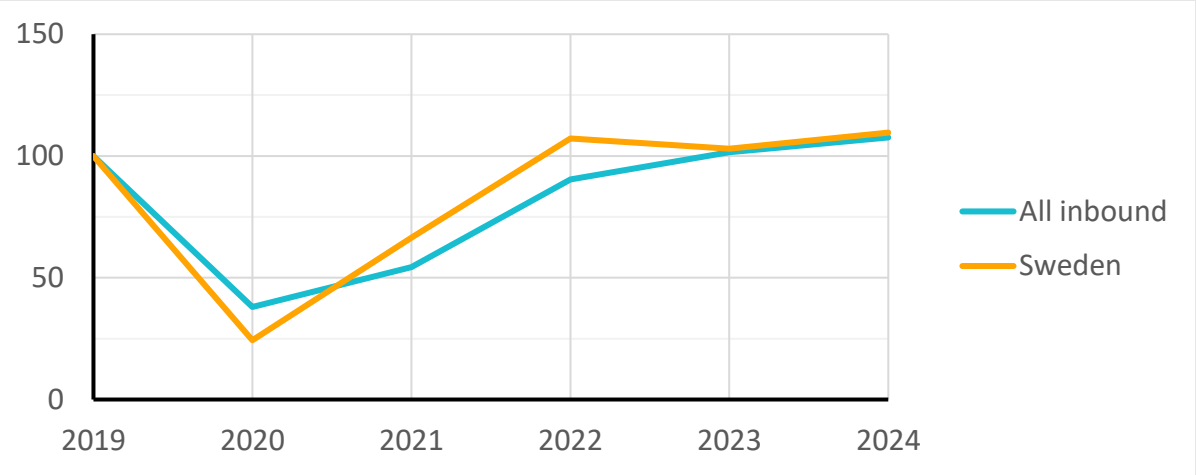
Trends 2019-2024



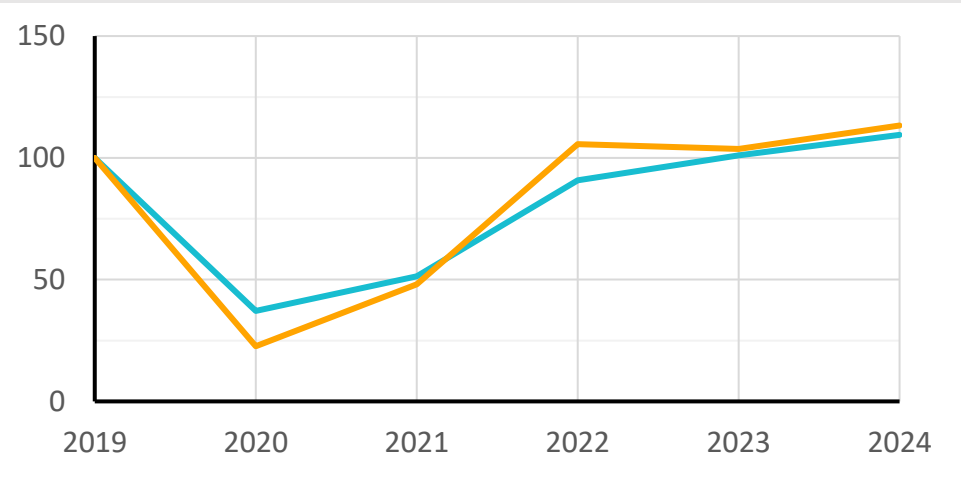
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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



(*) excluding camping.
Source: Statoc



Short-term rentals

2024 and 2018-2024

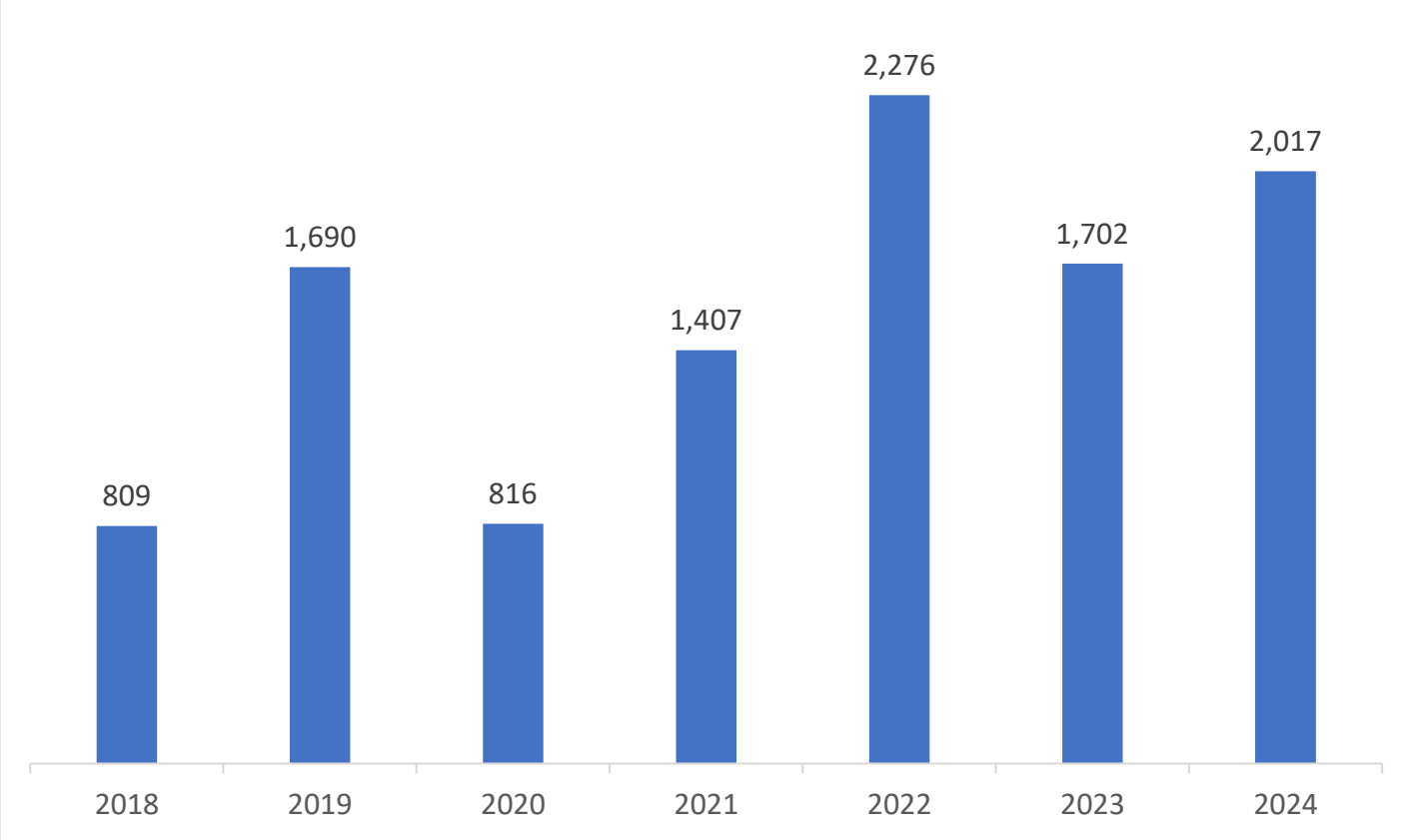
Nights,
Short-term rentals, 2024



19% (vs. 2023)

19% (vs. 2019)

Nights,
Short-term rentals, 2018-2024





Characteristics of inbound trips

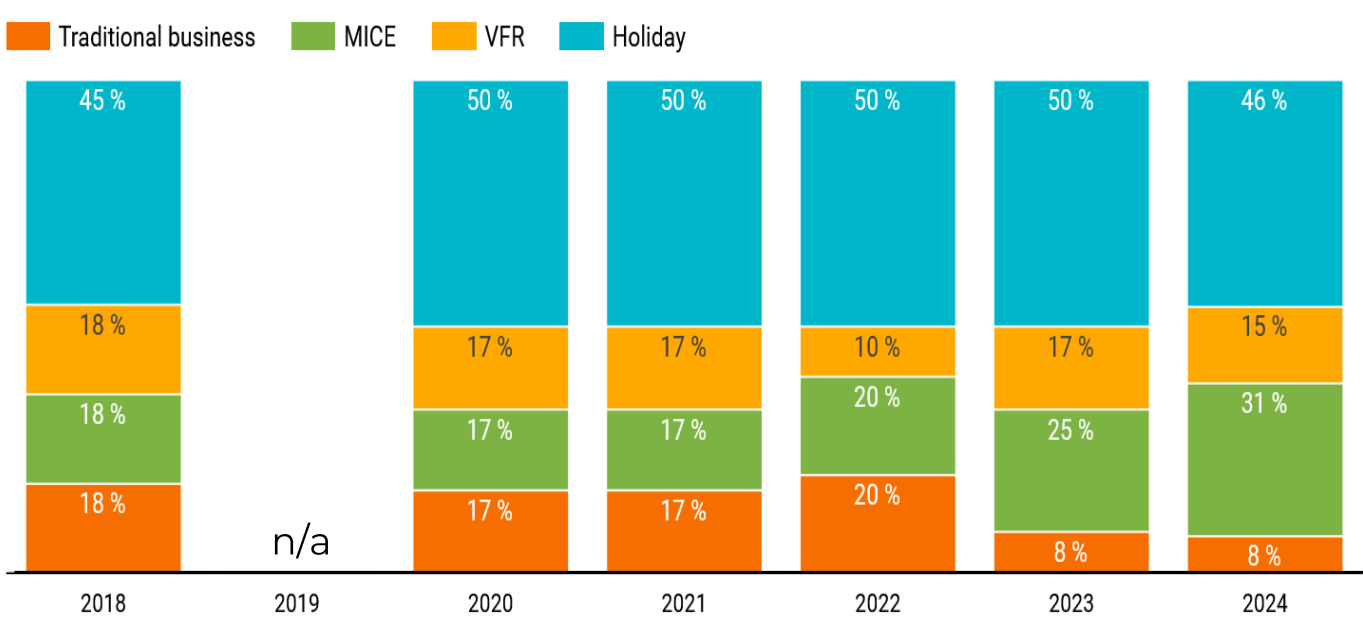


Danish trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2018-2024

Danish trips to Luxembourg, 2018-2024



2024

Denmark to Luxembourg Europe to Luxembourg

Holiday	46%	61%
VFR	15%	15%
MICE	31%	15%
Traditional Business	8%	8%



Inbound same-day trips to Luxembourg

2024



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

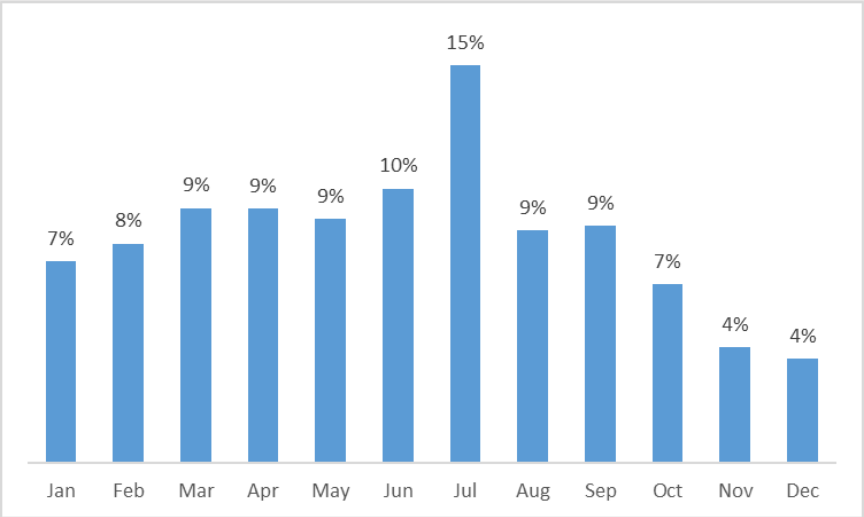


Average length
of same-day trips



-0,4 h (vs. 2023)

Seasonality
% of same-day trips



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

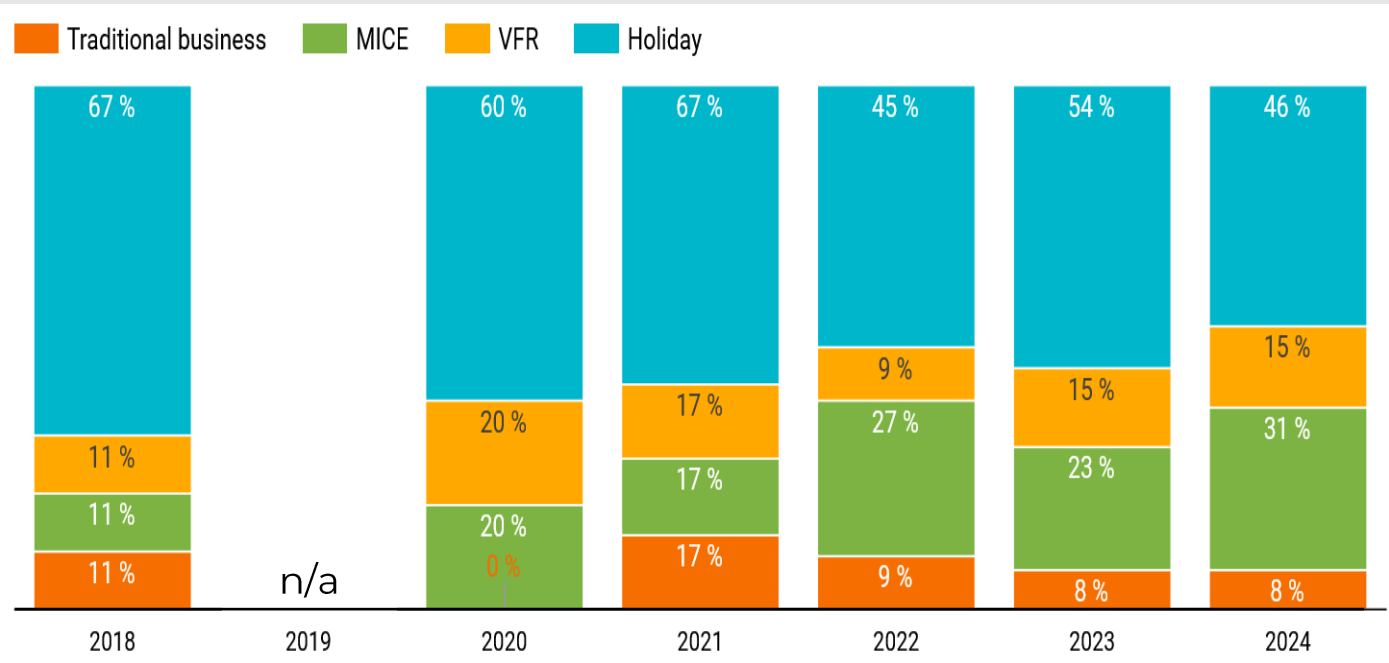


Swedish trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2018-2024

Swedish trips to Luxembourg, 2018-2024



2024

Sweden to Luxembourg Europe to Luxembourg

Holiday	46%	61%
VFR	15%	15%
MICE	31%	15%
Traditional Business	8%	8%



Inbound same-day trips to Luxembourg

2024



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



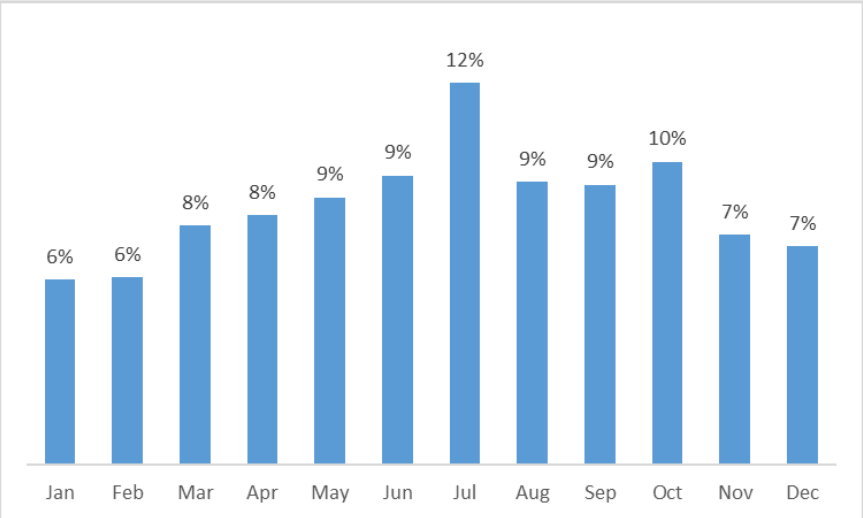
+5% (vs. 2023)

Average length
of same-day trips



+/-0,0 h (vs. 2023)

Seasonality
% of same-day trips



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



Travel behaviour of inbound leisure visitors

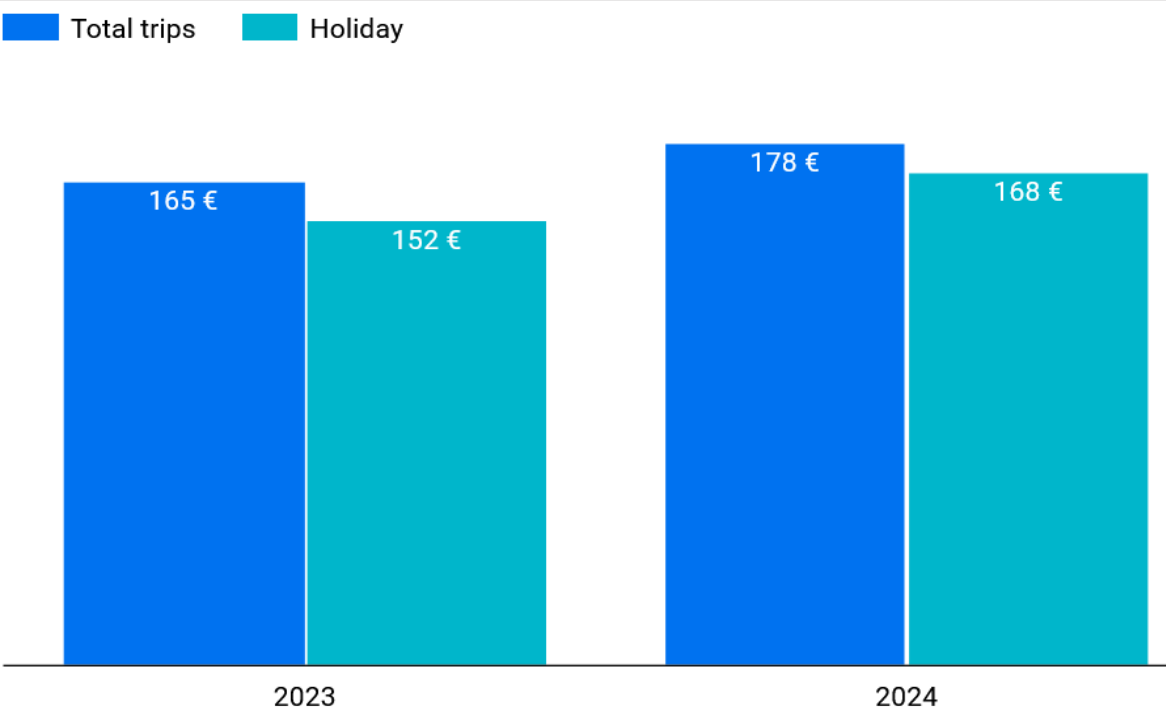


Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

Average expenditure/pers./day



2024

Denmark to All inbound to
Luxembourg

Spend/day/pers. on all trips	178€	189€
Spend/day/pers. on holiday trips	168€	168€

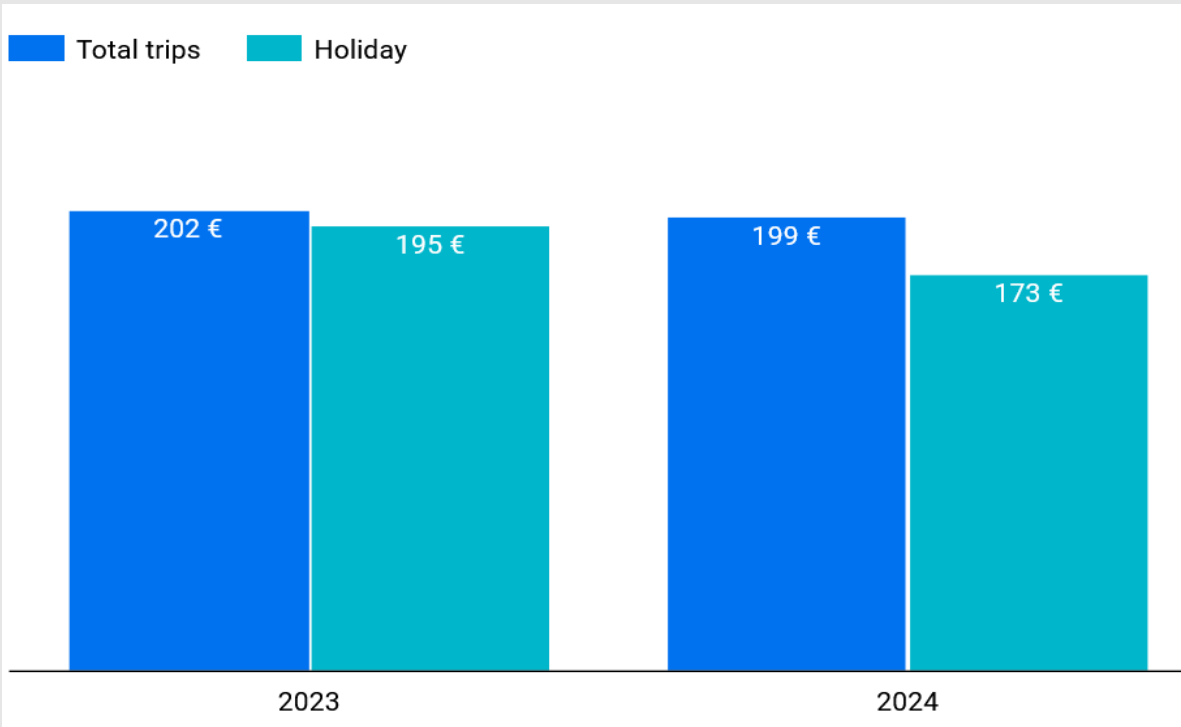


Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

Average expenditure/pers./day



2024

Sweden to Luxembourg All inbound to Luxembourg

Spend/day/pers. on all trips	199€	189€
Spend/day/pers. on holiday trips	173€	168€

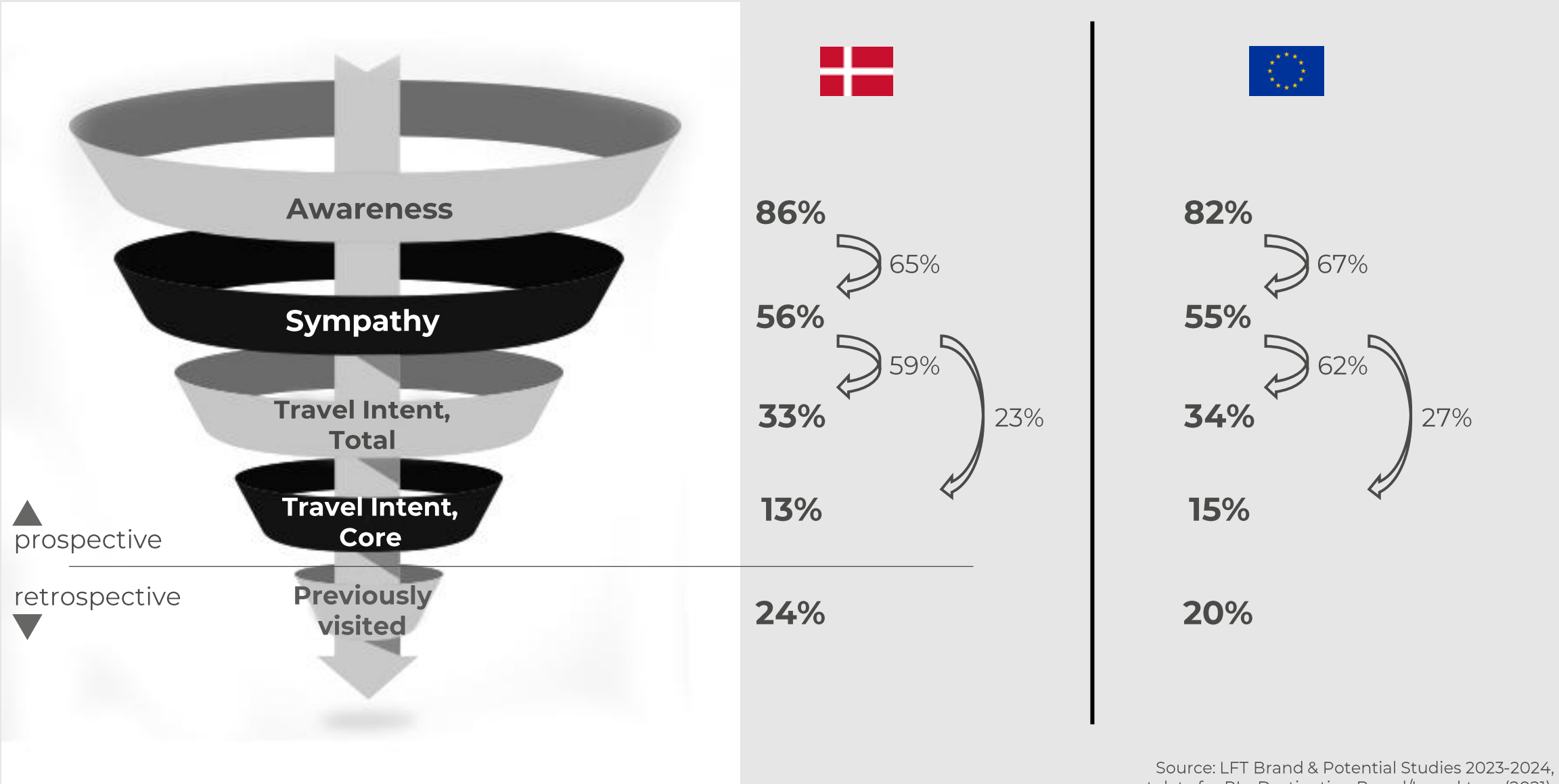


Target segments, Brand & Growth Potential



Destination Luxembourg - Brand Funnel 2024

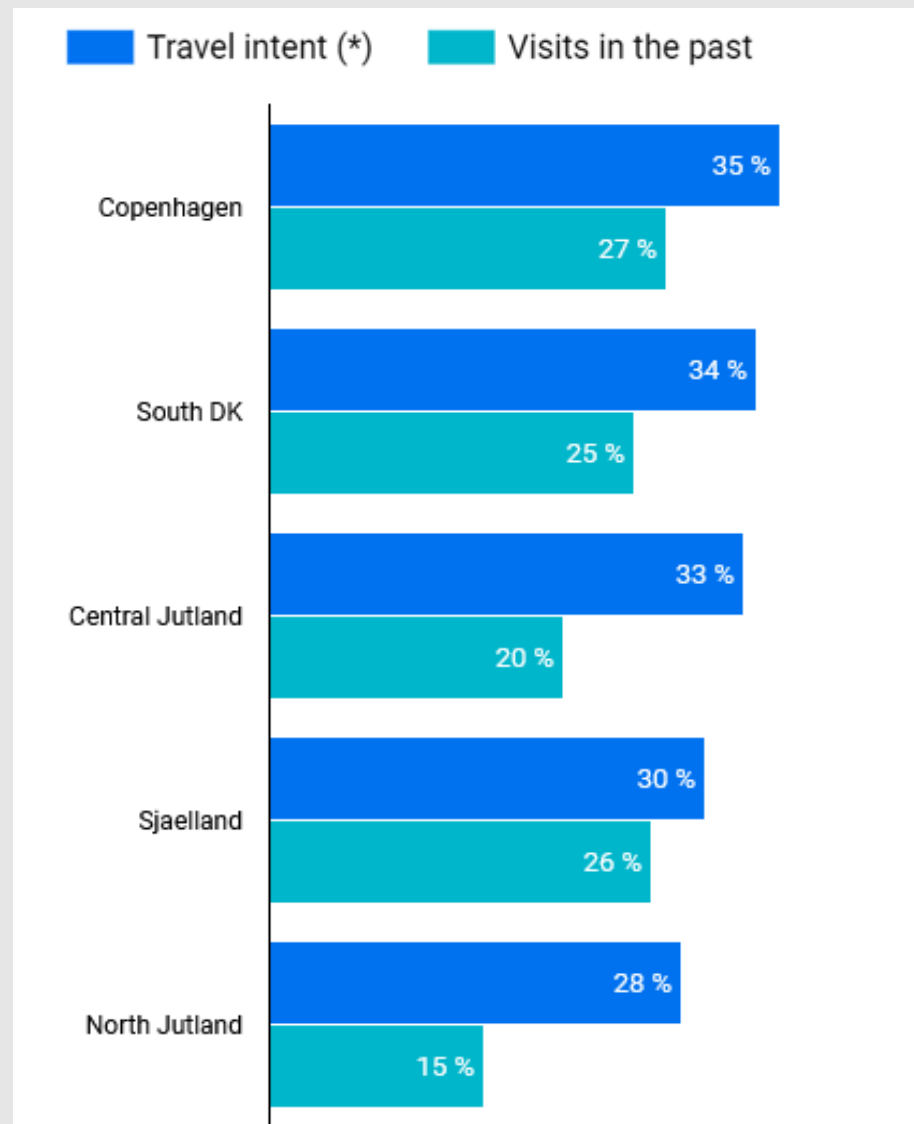
Assessing Luxembourg's **brand strength** as a destination





Regional origin 2024




Past visitors and future potential





General theme interest (*)



Theme			
	Rank	Rank	% interested
Resting/Relaxation	1	1	73%
Culinary	2	2	70%
Nature	3	3	69%
Family	12	4	65%
City	5	5	65%
Culture	11	6	56%
Events	16	7	55%
Luxury	24	8	55%
History/Unesco	10	9	55%
Shopping	23	10	54%
Castles	9	11	51%
Sustainability	15	12	51%
Wellness	25	13	51%
Hiking	17	14	51%
Nightlife (**)	20	15	50%
Countryside	22	16	49%
Wine	21	17	47%
Camping	29	18	46%
Travelling by train	18	19	45%
Active-sports	27	20	44%
Industrial heritage	28	21	38%
Cycling	31	22	33%
MTB	32	23	30%
Motorcycling	33	24	28%

(*) 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
City	1	1	37%
Resting/Relaxation	2	2	33%
Culinary	3	3	33%
Shopping	8	4	30%
Family	7	5	29%
Nature	4	6	28%
Culture	5	6	28%
Nightlife (**)	11	8	26%
History/Unesco	10	9	25%
Castles	6	10	24%
Wine	12	11	21%
Wellness	13	12	21%
Industrial heritage	19	13	20%
Sustainability	15	14	20%
Countryside	14	15	19%
Hiking	9	16	19%
Active-sports	18	17	18%
Camping	16	18	17%
Cycling	17	19	17%
MTB	20	20	16%

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

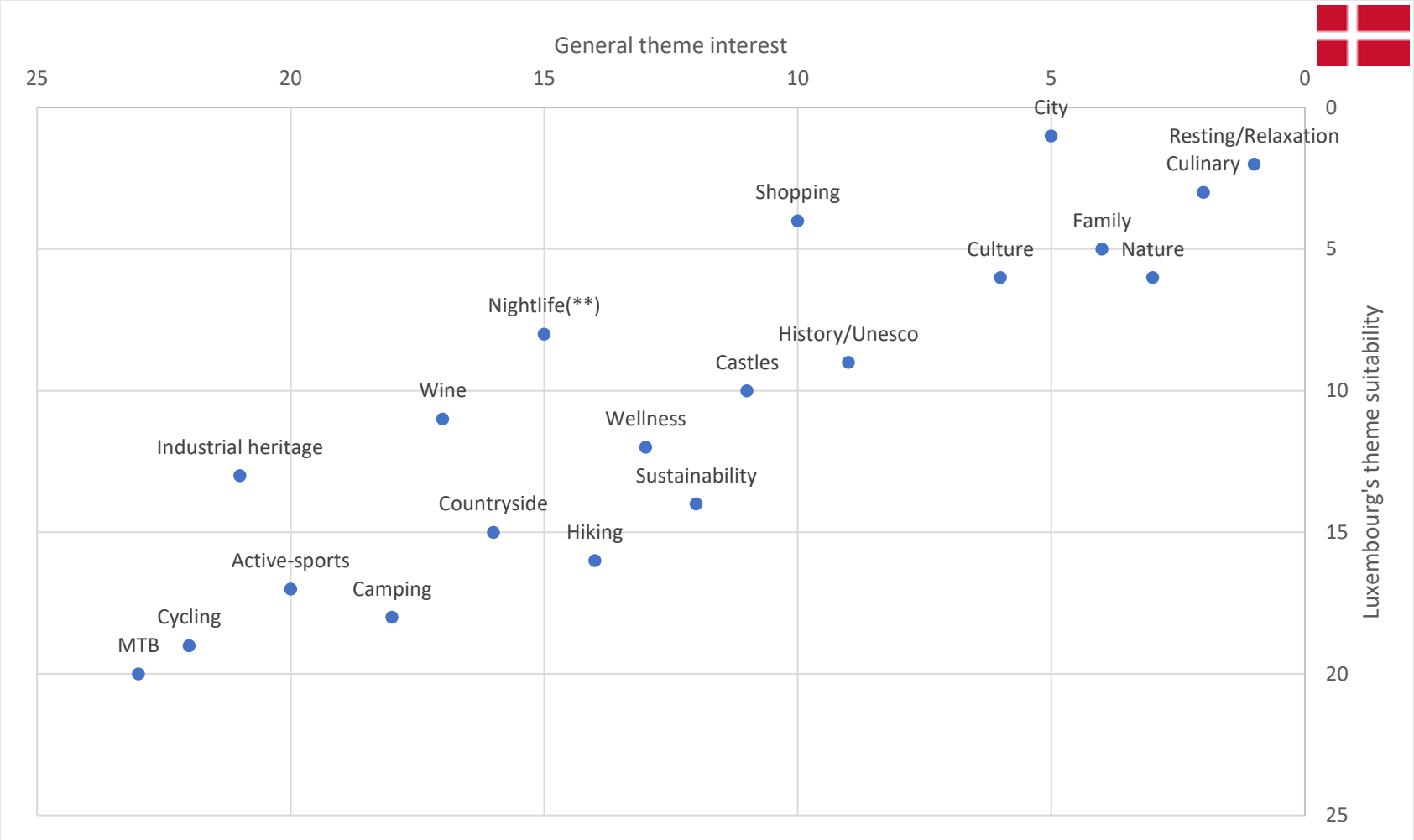
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

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

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).



Luxembourg's Brand Value Ratings (*)



Feature			
	Rank	Rank	% agreeing
of high quality	2	1	40%
open-minded, tolerant, international	5	2	40%
safe	1	3	40%
authentic, real	4	4	39%
welcoming, hospitable	3	5	38%
exclusive, luxurious	7	6	37%
attractive, appealing	6	7	36%
dynamic, modern	8	8	32%
service oriented	9	9	32%
surprising	10	10	32%
lively, trendy	12	11	30%
varied, diversified	11	12	27%
not overcrowded / insider tip	13	13	24%
sustainable	14	14	20%

(*) Brand feature associated with destination
Luxembourg,
% of respondents agreeing.

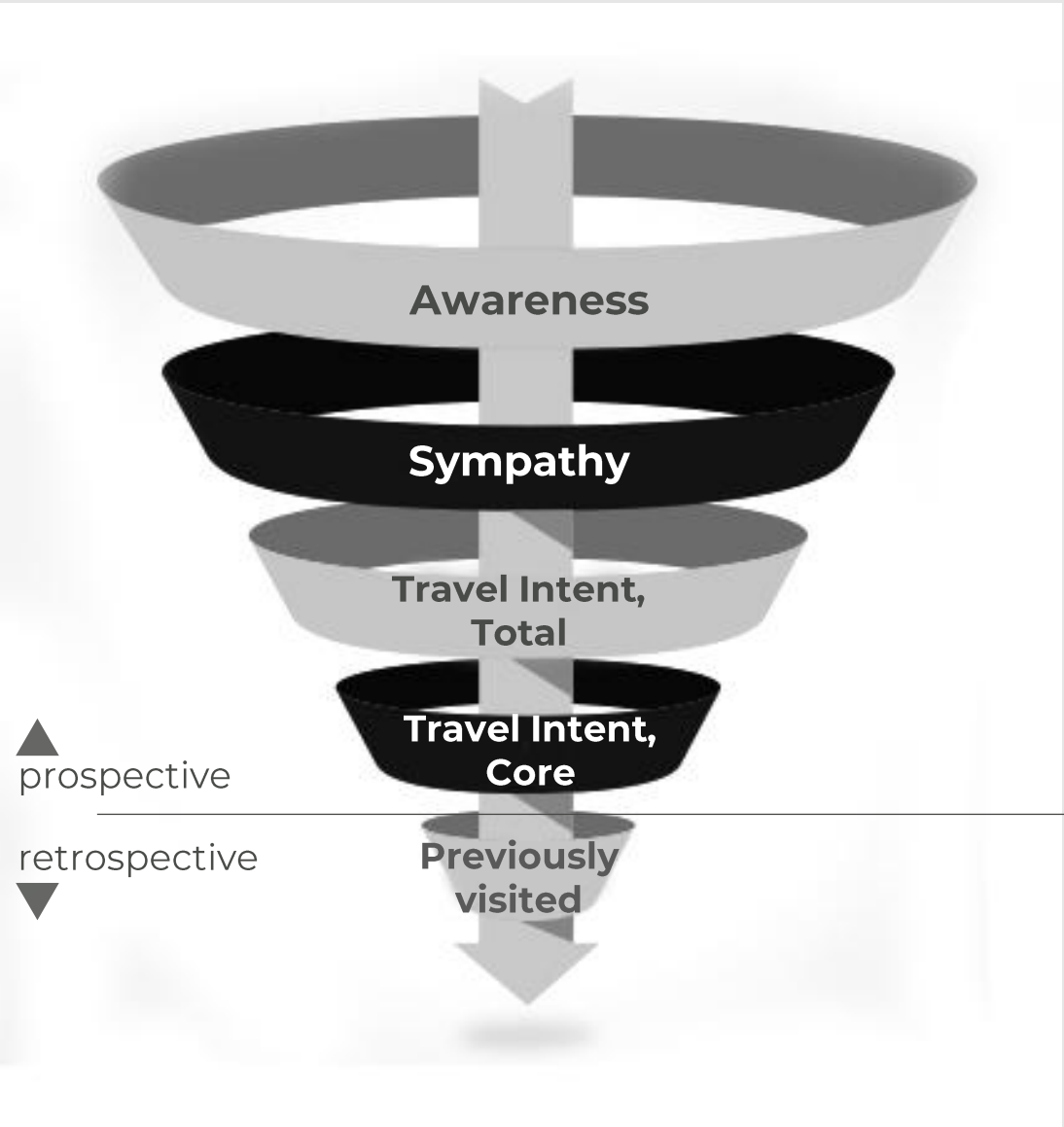
Europe : average rank for source markets
DE-BE-NL-FR-UK-CH-AT-IT-ES-IE-DK-SE-PT.





Destination Luxembourg - Brand Funnel 2024

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

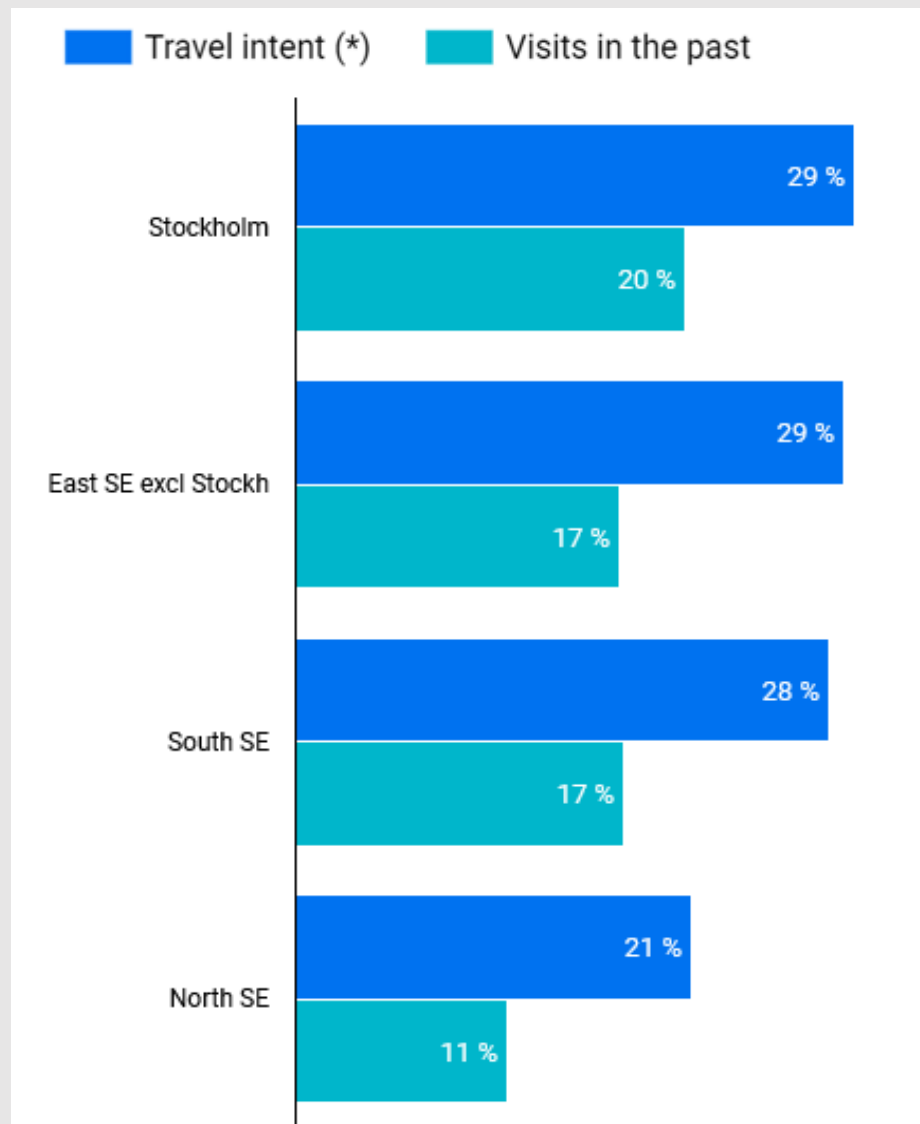


Source: LFT Brand & Potential Study, 2023-2024, except data for PL: Destination Brand/Inspektour (2021).



Regional origin 2024



Past visitors and future potential





General theme interest (*)



Theme			
	Rank	Rank	% interested
Resting/Relaxation	1	1	73%
Culinary	2	2	71%
Nature	3	3	67%
City	5	4	65%
Sustainability	15	5	63%
Family	12	6	63%
History/Unesco	10	7	58%
Culture	11	8	56%
Events	16	9	55%
Travelling by train	18	10	54%
Castles	9	11	53%
Luxury	24	12	53%
Countryside	22	13	52%
Shopping	23	14	51%
Wine	21	15	51%
Nightlife (**)	20	16	51%
Hiking	17	17	47%
Wellness	25	18	44%
Active-sports	27	19	43%
Camping	29	20	43%
Industrial heritage	28	21	40%
Cycling	31	22	35%
Motorcycling	33	23	29%
MTB	32	24	27%

(*) 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
Culinary	3	1	36%
City	1	2	31%
Shopping	8	3	28%
Resting/Relaxation	2	4	28%
Culture	5	5	26%
Family	7	6	25%
Nightlife (**)	11	7	23%
Castles	6	8	22%
History/Unesco	10	9	21%
Wine	12	10	21%
Nature	4	11	20%
Countryside	14	12	19%
Sustainability	15	13	18%
Wellness	13	14	16%
Hiking	9	15	15%
Active-sports	18	16	15%
Camping	16	17	15%
Industrial heritage	19	18	13%
Cycling	17	19	12%
MTB	20	20	12%

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

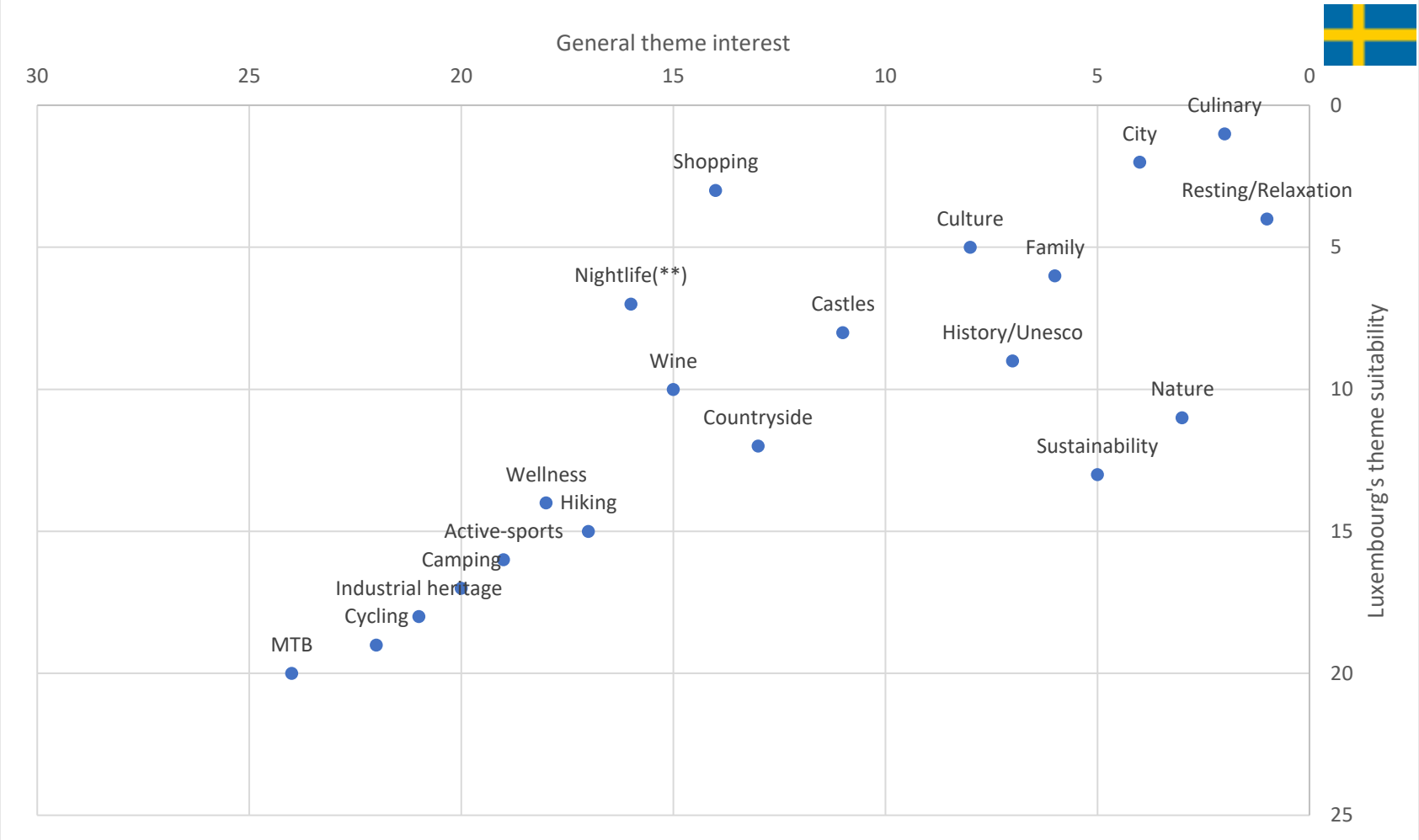
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

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

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).



Luxembourg's Brand Value Ratings (*)



Feature			
	Rank	Rank	% agreeing
safe	1	1	35%
welcoming, hospitable	3	2	34%
of high quality	2	3	34%
exclusive, luxurious	7	4	32%
attractive, appealing	6	5	29%
authentic, real	4	6	27%
service oriented	9	7	26%
dynamic, modern	8	8	24%
surprising	10	9	24%
open-minded, tolerant, international	5	10	24%
lively, trendy	12	11	24%
varied, diversified	11	12	23%
not overcrowded / insider tip	13	13	21%
sustainable	14	14	20%

(*) 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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