



Luxembourg for Tourism
Market profile
ITALY
2024

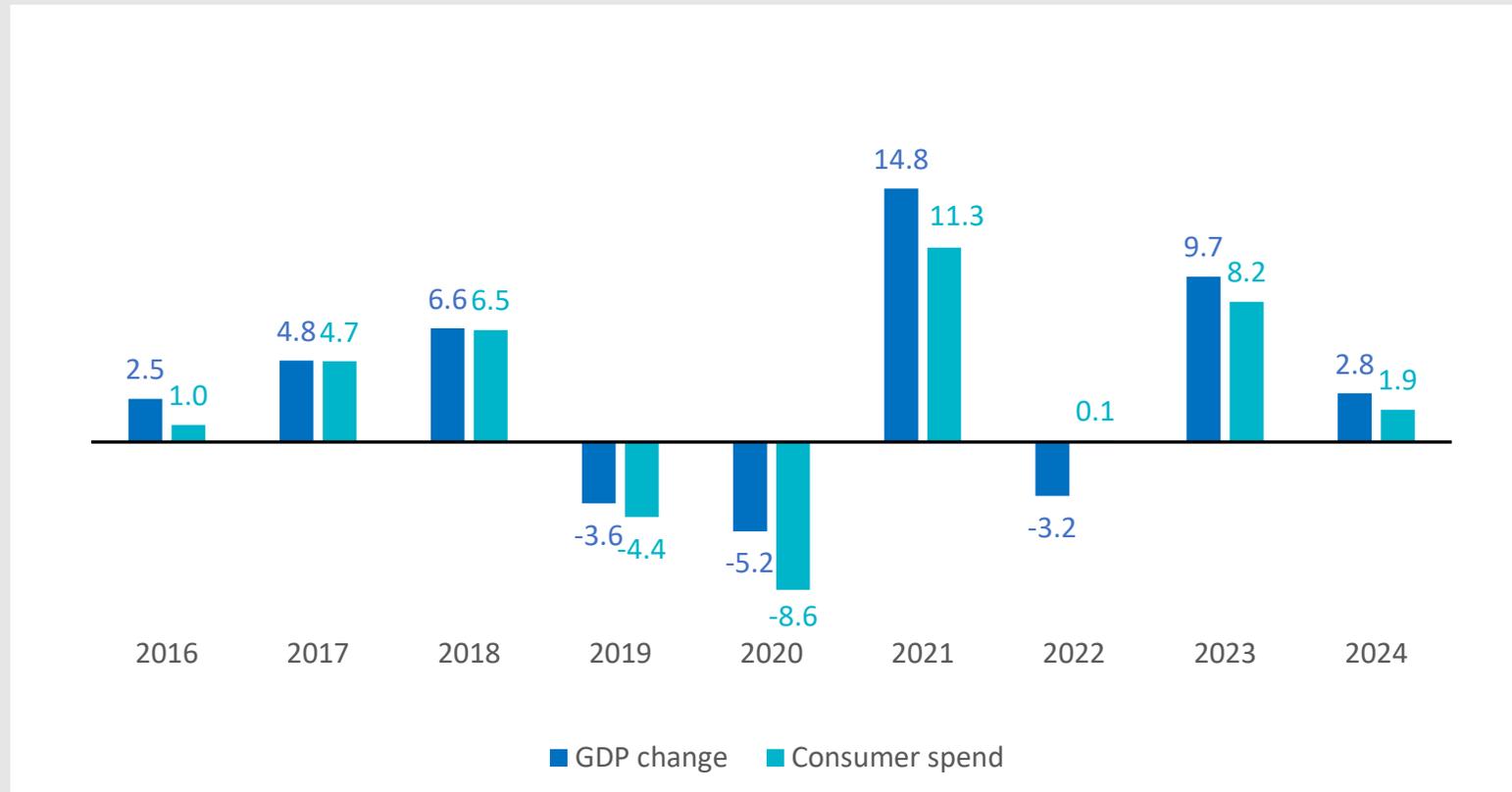


Economic indicators & General Travel Demand

Economic indicators – General travel demand



GDP and consumer spending, % annual change



Economy & population

GDP (\$) per capita
40,210.65

Unemployment (%)
6.58

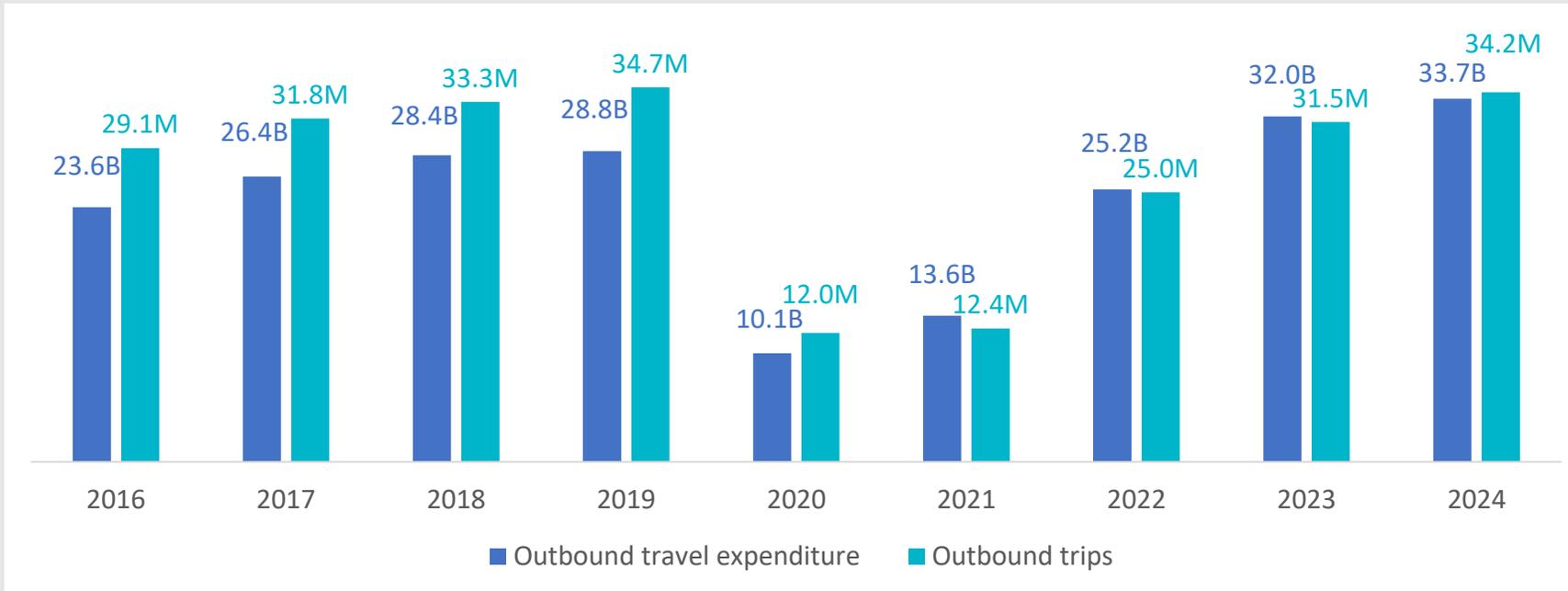
Inflation(%)
0.98

Population
58,918,290

Economic indicators – General travel demand



Outbound trips and travel expenditure



Outbound travel intensity
0.58 trips
 per inhabitant (2024)

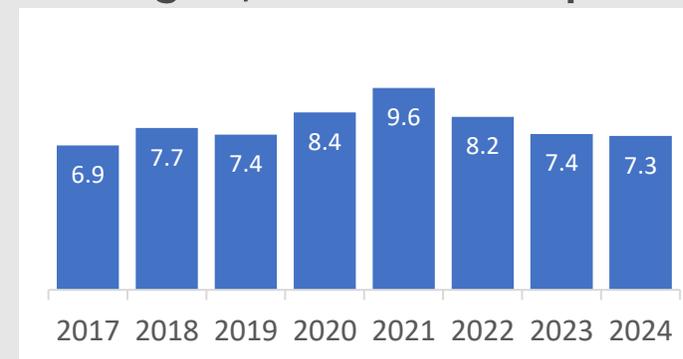
Average spend
 per outbound trip (2024)
983 \$

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2024)
88.2%

Average length of stay, nights, all outbound trips



Share of short trips
(1-3 nights),
% all outbound
trips (2024)
24.3%



Arrivals & nights in paid accommodation

Nights in paid accommodation

2024 and 2018-2024

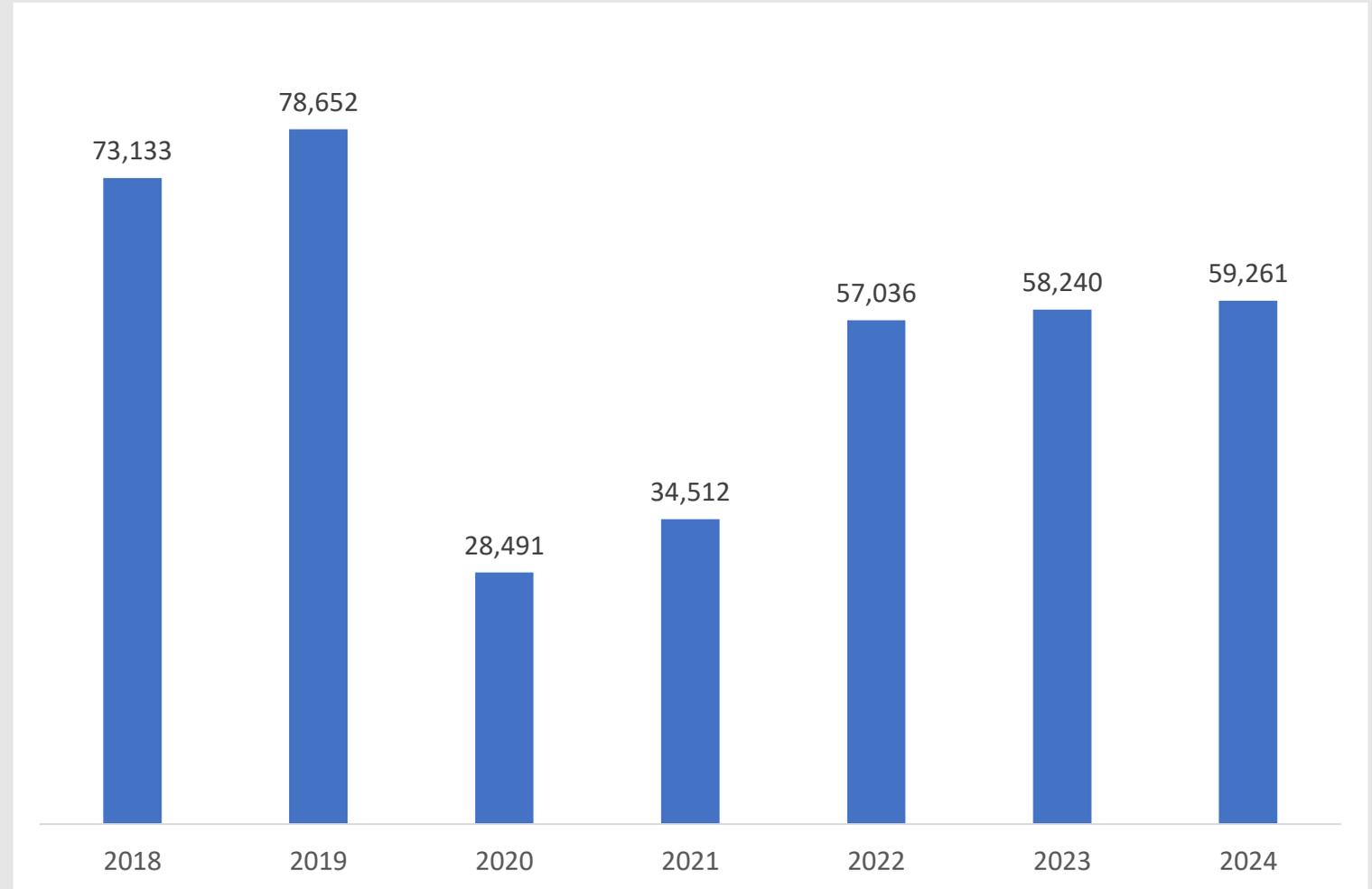


**Nights,
paid accommodation, 2024**



+2% (vs. 2023)

-25% (vs. 2019)



Arrivals in paid accommodation

2024 and 2018-2024

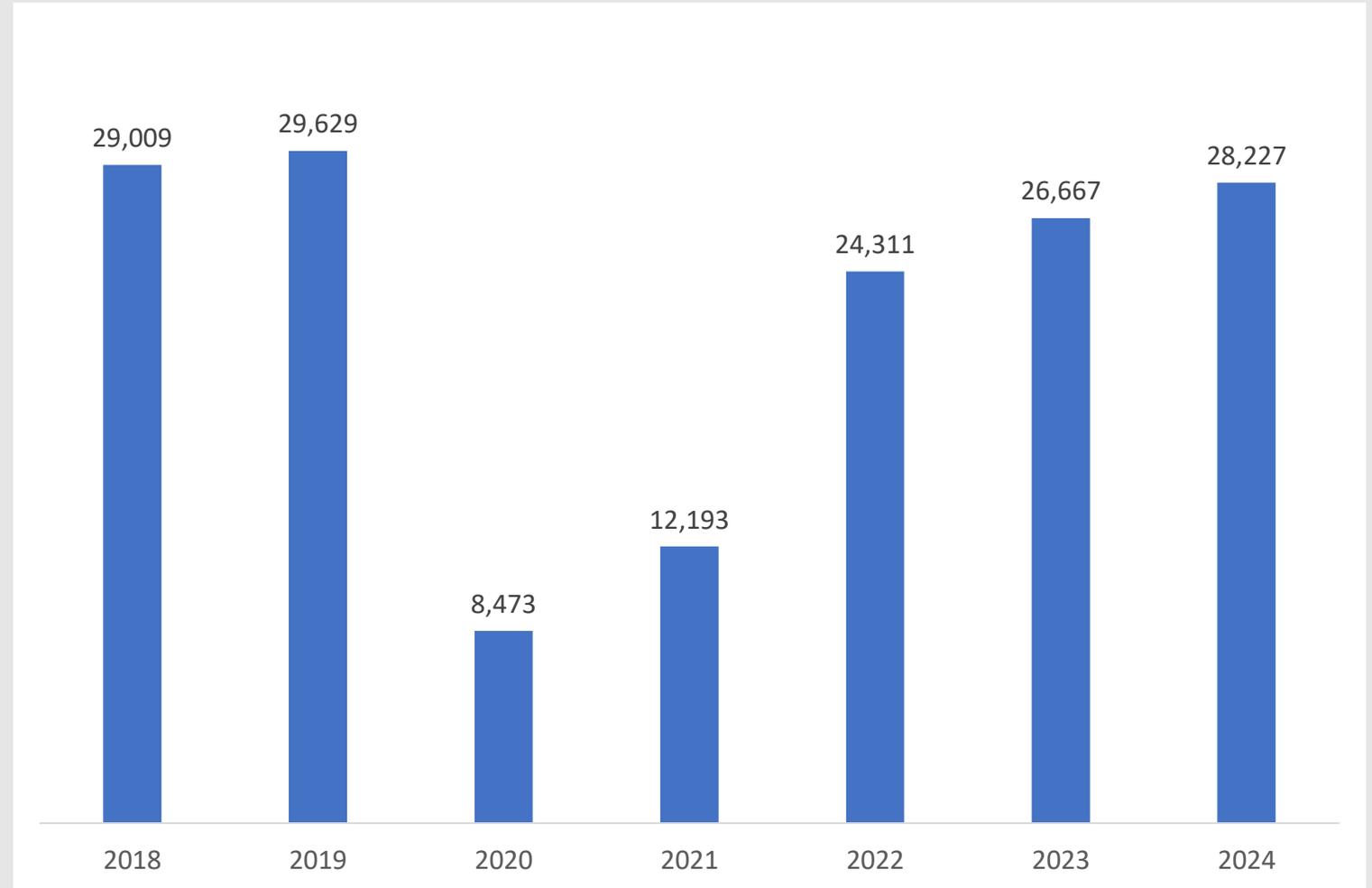


Arrivals,
paid accommodation, 2024



+6% (vs. 2023)

-5% (vs. 2019)



Length of stay, paid accommodation

2024 and 2018-2024

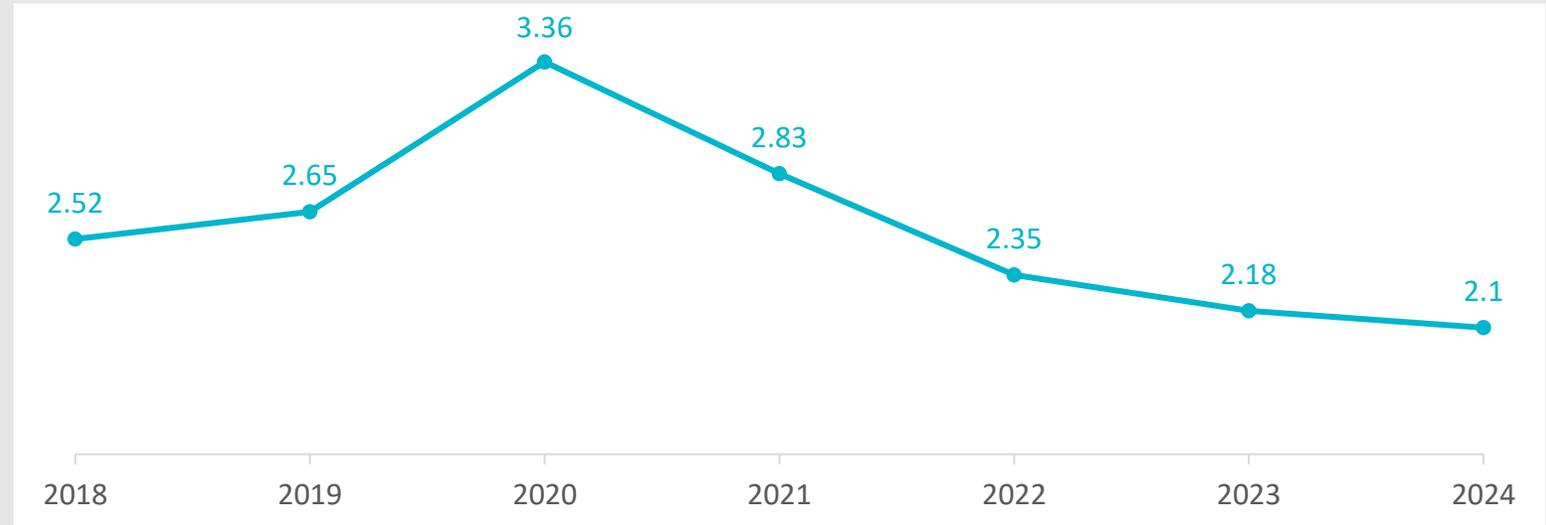


Average length of stay,
paid accommodation, 2024



-0.08 nights (vs. 2023)

-0.55 nights (vs. 2019)

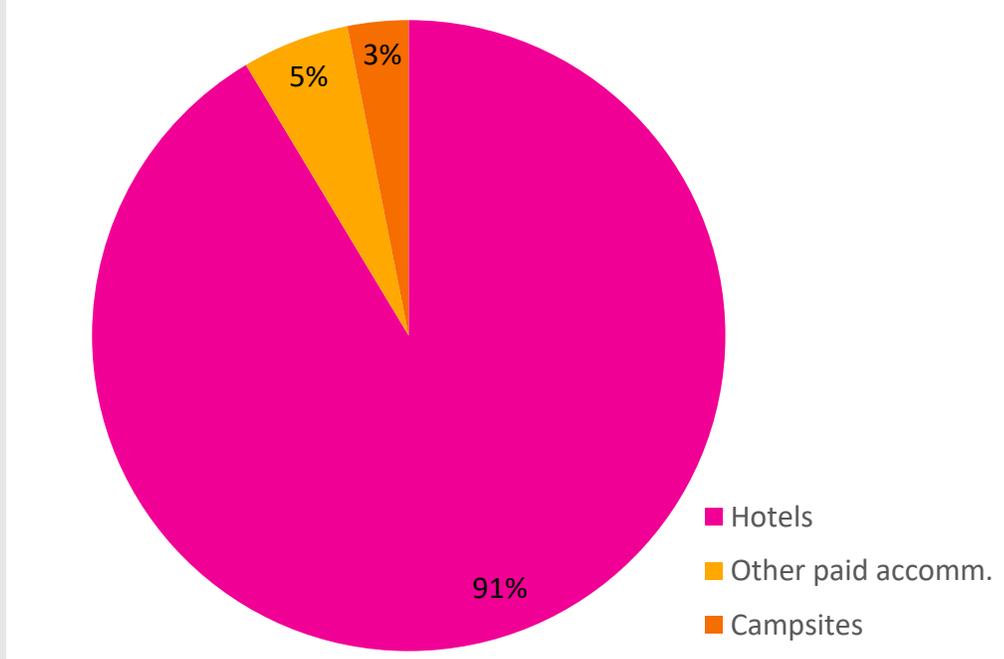


Nights & arrivals in paid accommodation

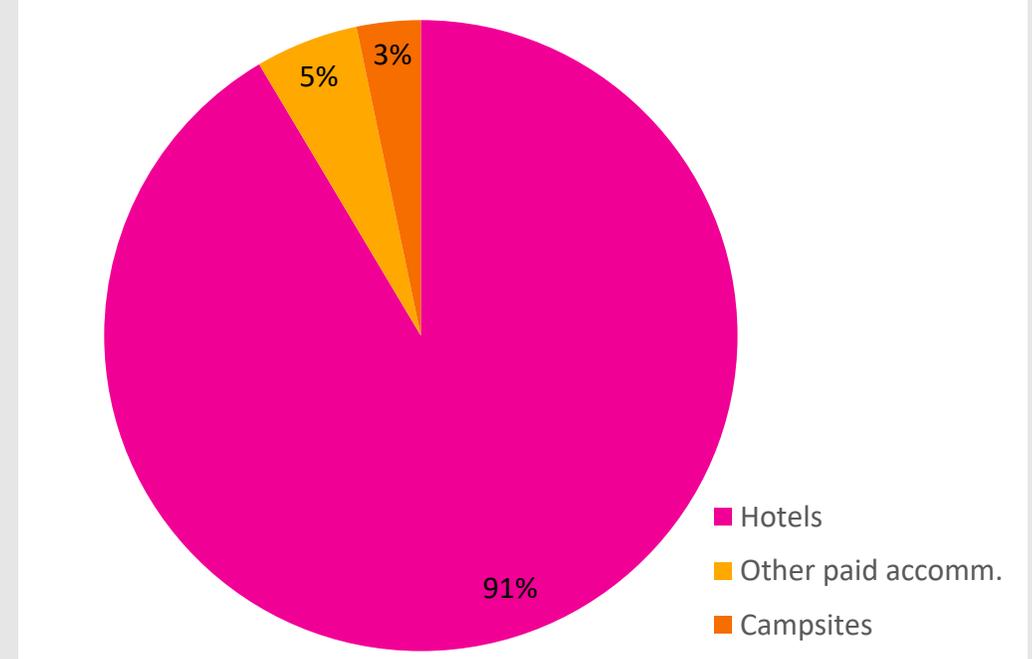
Type of accommodation, 2024



**Nights,
paid accommodation, 2024**



**Arrivals,
paid accommodation, 2024**



Hotels	54.169	+1% (vs. 2023)	-22% (vs. 2019)
Other paid accomm.	3.251	+10% (vs. 2023)	-50% (vs. 2019)
Campsites	1.841	+6% (vs. 2023)	-29% (vs. 2019)

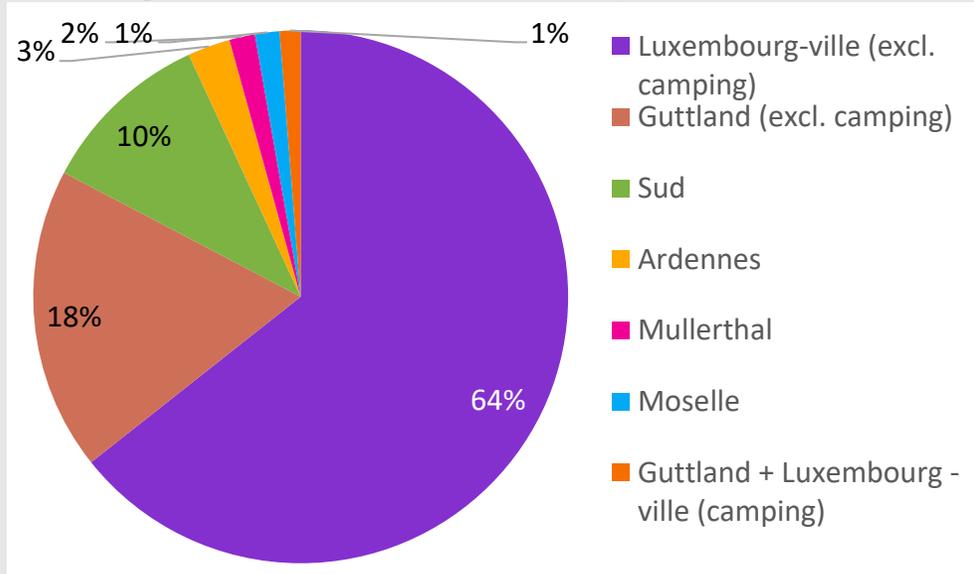
Hotels	25.820	+6% (vs. 2023)	-2% (vs. 2019)
Other paid accomm.	1.486	-1% (vs. 2023)	-33% (vs. 2019)
Campsites	921	+3% (vs. 2023)	-13% (vs. 2019)

Nights & arrivals in paid accommodation

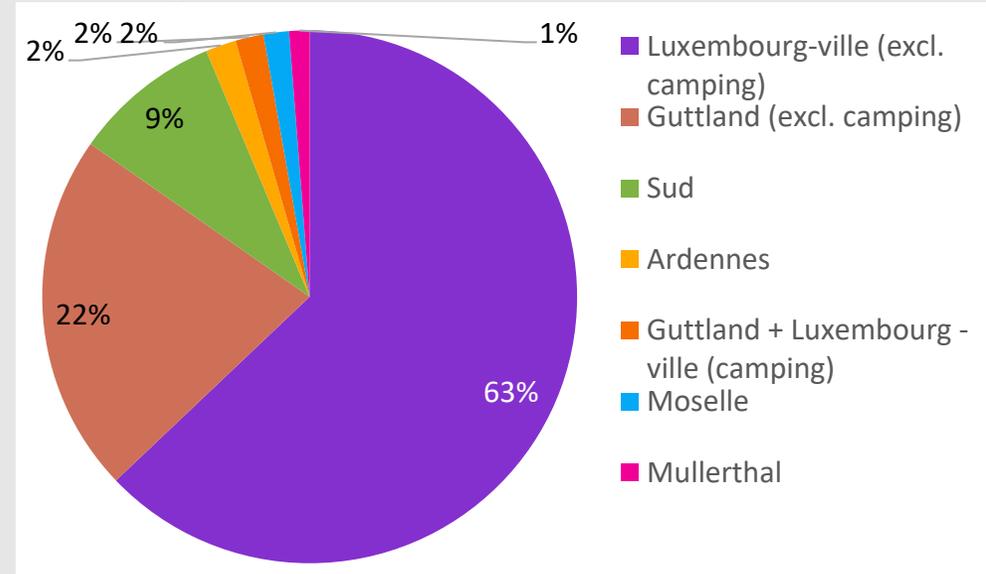
Regions, 2024



Nights, paid accommodation, 2024



Arrivals, paid accommodation, 2024



Lux.-City (excl. camping)	38.122	+6% (vs. 2023)	+0% (vs. 2019)
Guttland (excl. camping)	10.892	-6% (vs. 2023)	-27% (vs. 2019)
South	6.176	-14% (vs. 2023)	-69% (vs. 2019)
Eislek	1.526	+32% (vs. 2023)	-33% (vs. 2019)
MPSL	919	+59% (vs. 2023)	+8% (vs. 2019)
Moselle	883	+7% (vs. 2023)	-39% (vs. 2019)
Guttland/Lux.-City (camping)	743	-29% (vs. 2023)	-32% (vs. 2019)

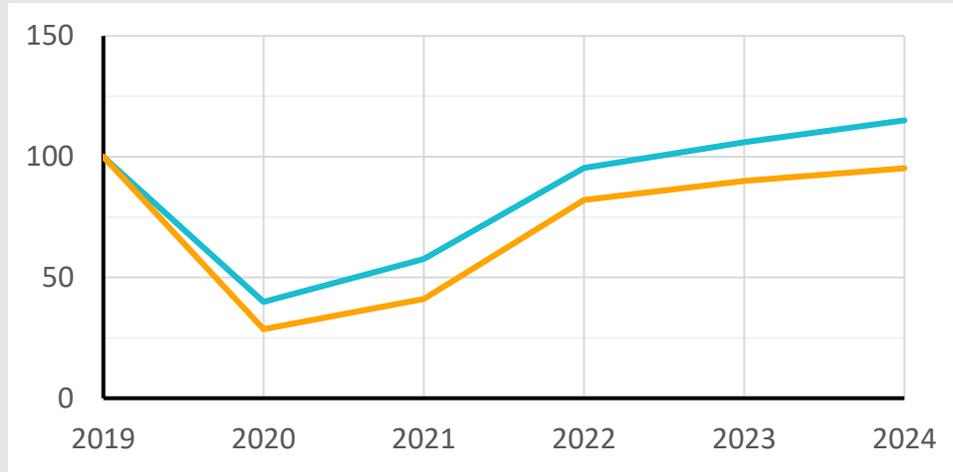
Lux.-City (excl. camping)	17.752	+14% (vs. 2023)	+24% (vs. 2019)
Guttland (excl. camping)	6.162	-2% (vs. 2023)	-20% (vs. 2019)
South	2.530	-17% (vs. 2023)	-51% (vs. 2019)
Eislek	521	-2% (vs. 2023)	-10% (vs. 2019)
Guttland/Lux.-City (camping)	480	-20% (vs. 2023)	-39% (vs. 2019)
Moselle	435	+10% (vs. 2023)	-35% (vs. 2019)
MPSL	347	+56% (vs. 2023)	-18% (vs. 2019)

Arrivals in paid accommodation

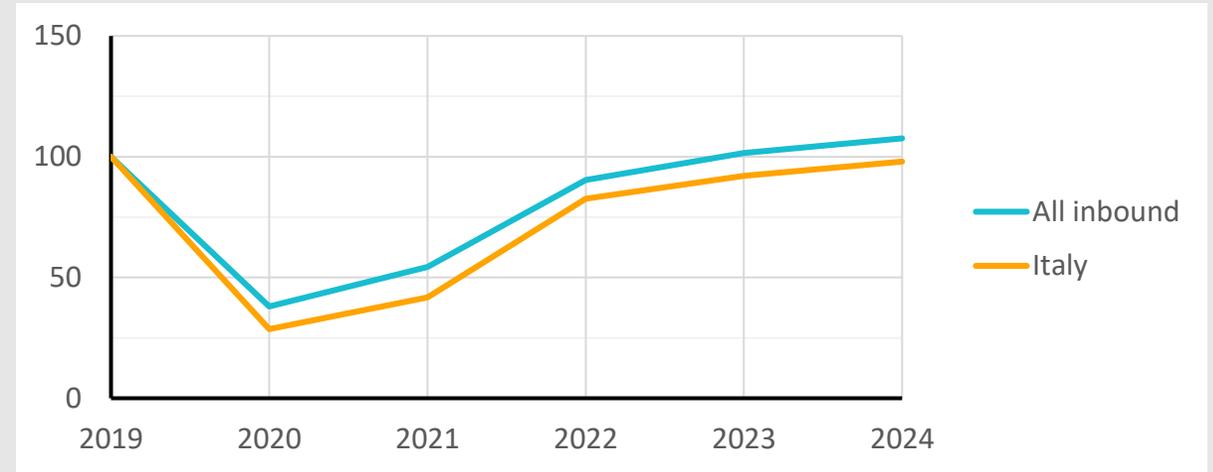
Trends 2019-2024



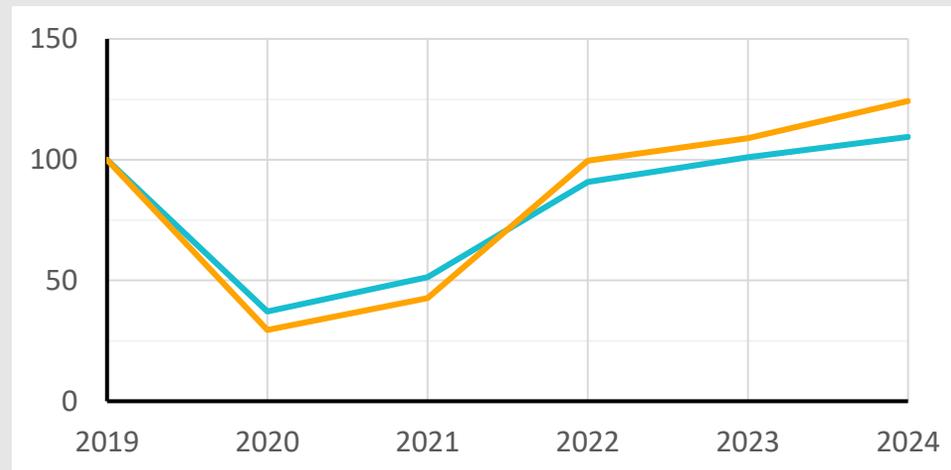
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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



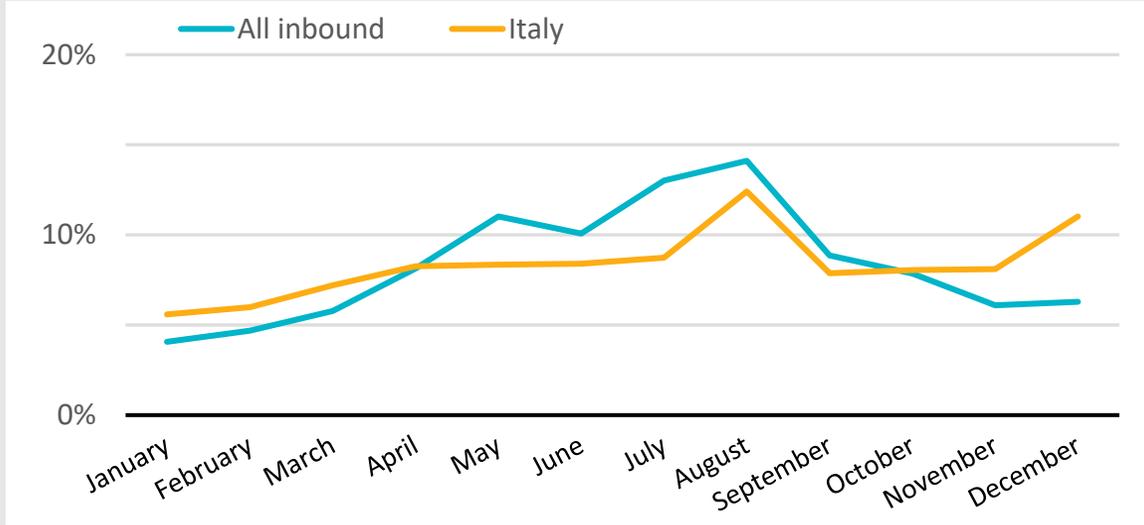
(*) excluding camping.
Source: Statec

Arrivals in paid accommodation

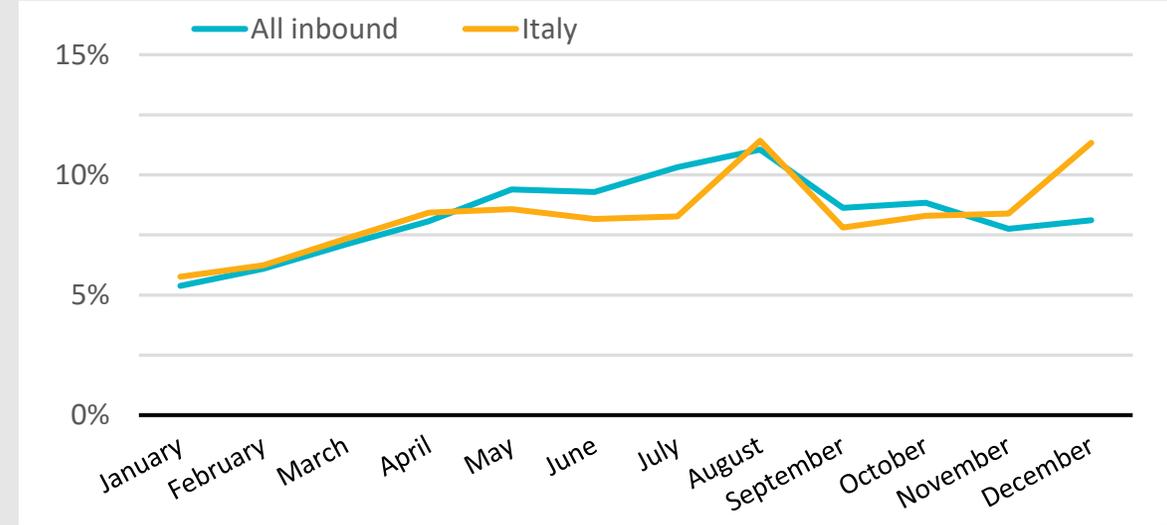
Seasonality



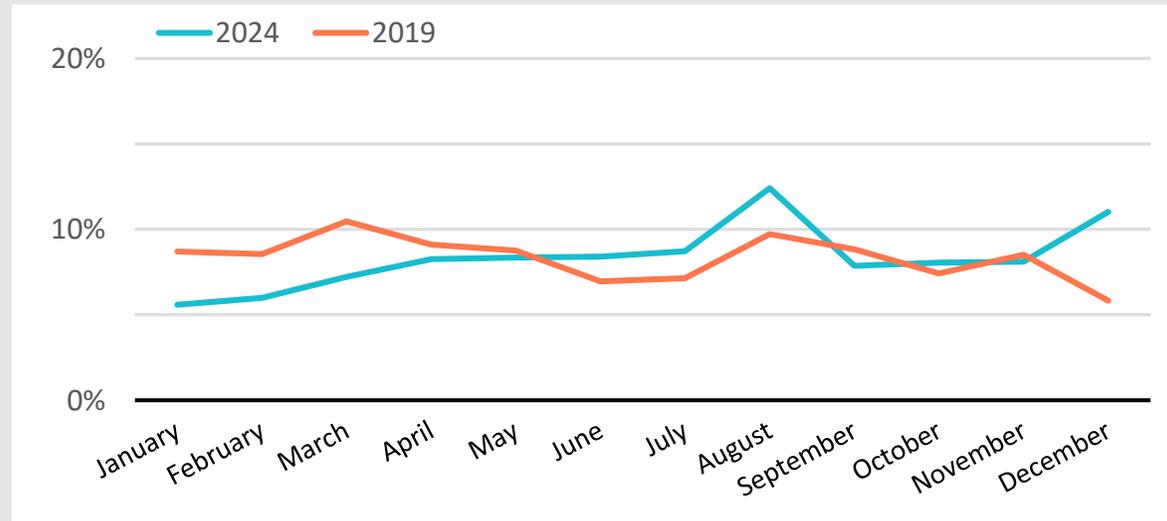
All paid accommodation, 2024



Hotels, 2024



All paid accommodation, arrivals from Italy



Short-term rentals

2024 and 2018-2024



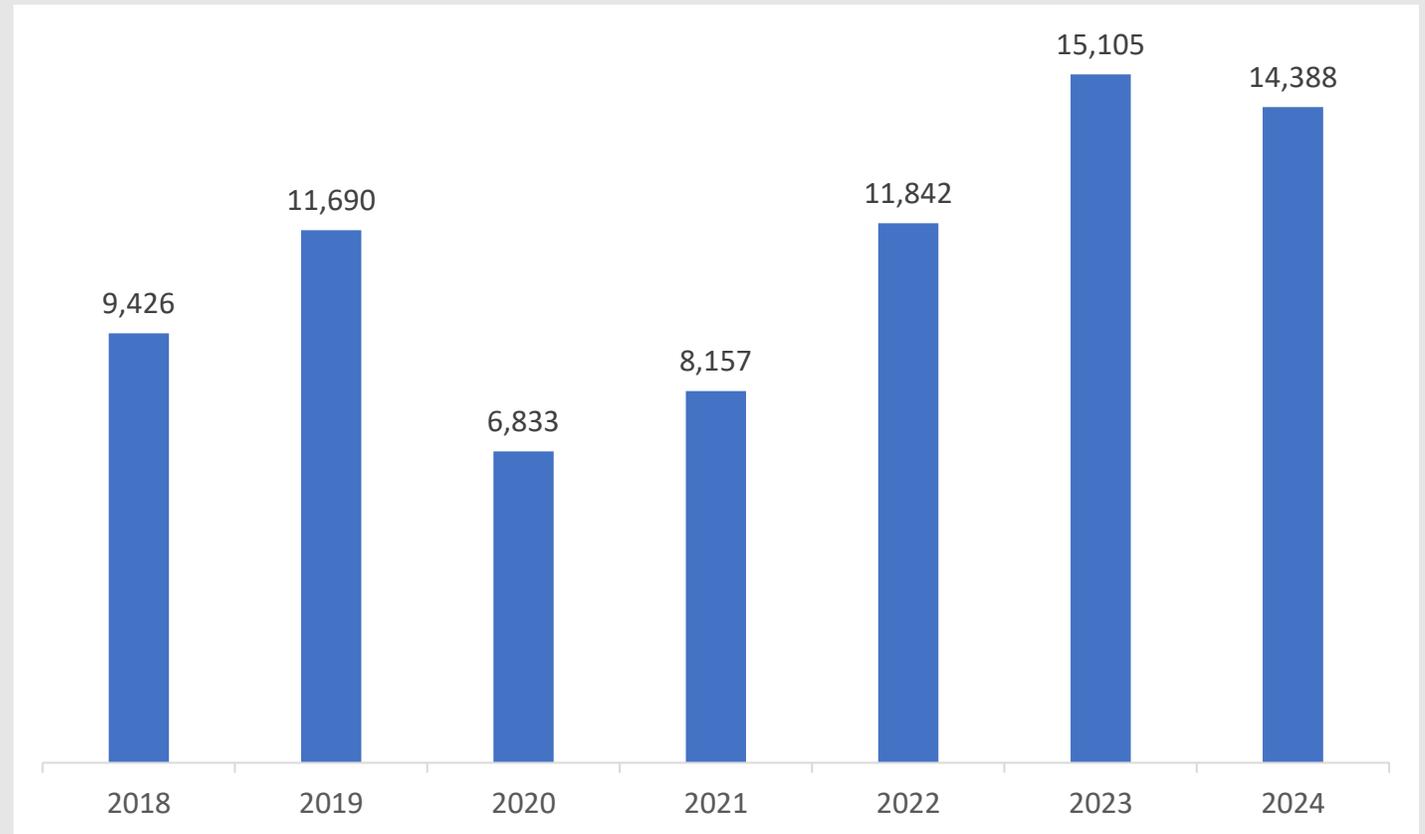
Nights,
Short-term rentals, 2024



-5% (vs. 2023)

23% (vs. 2019)

Nights,
Short-term rentals, 2018-2024





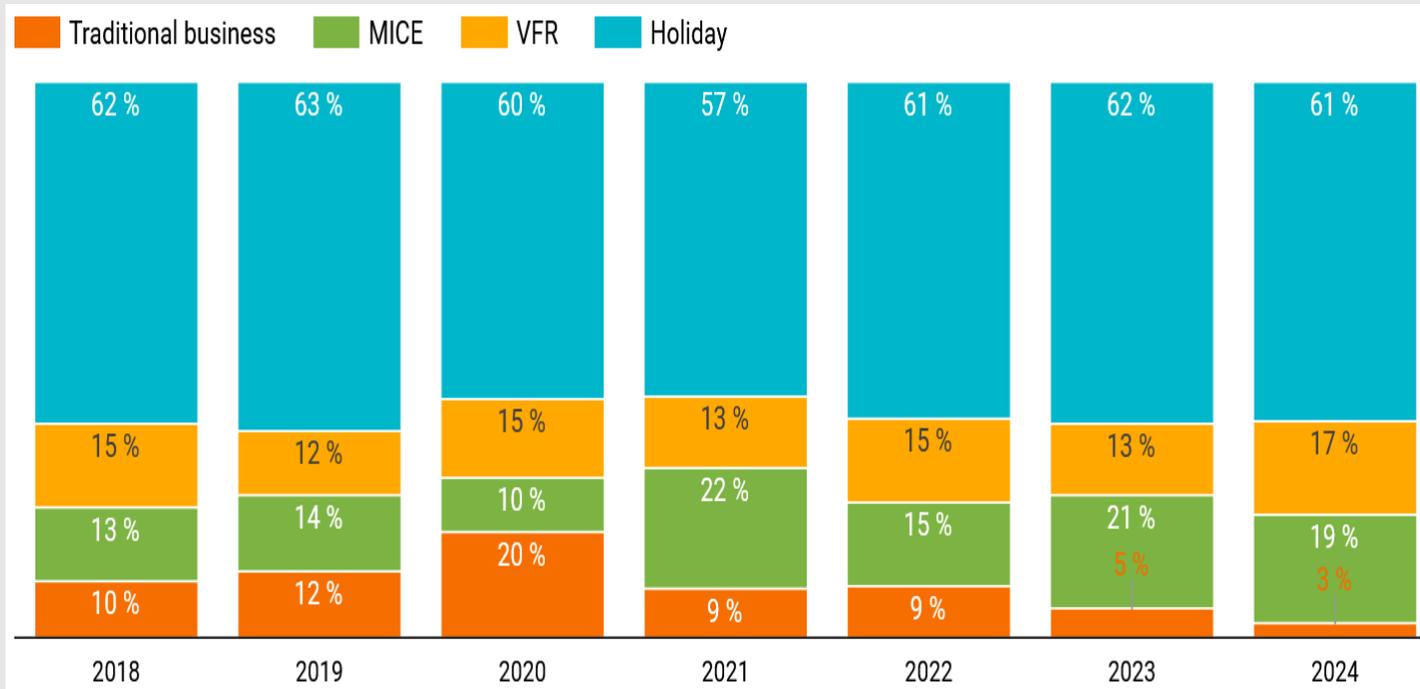
Characteristics of inbound trips

Italian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2018-2024

Italian trips to Luxembourg, 2018-2024



2024

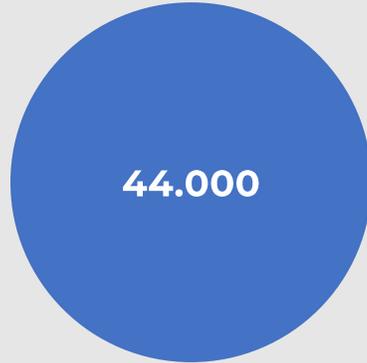
	Italy to Luxembourg	Europe to Luxembourg
Holiday	61%	61%
VFR	17%	15%
MICE	19%	15%
Traditional Business	3%	8%

Inbound same-day trips to Luxembourg

2024



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



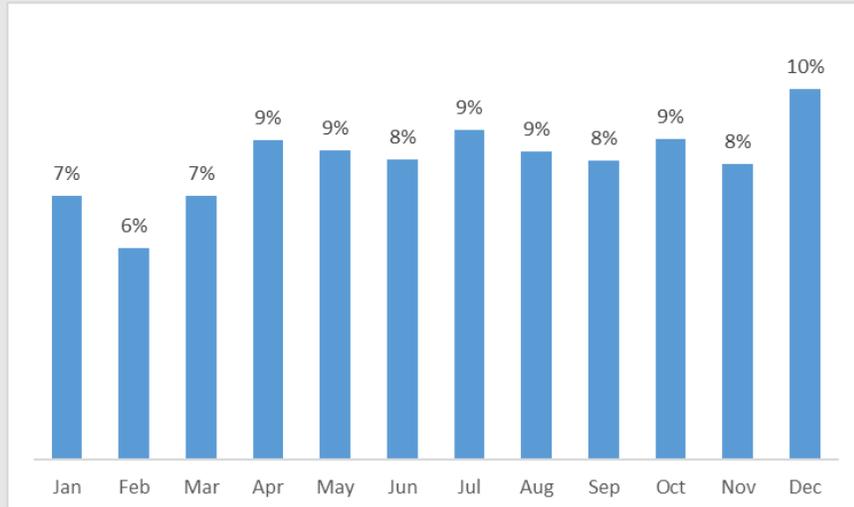
+/-0% (vs. 2023)

Average length of same-day trips



+0,3 h (vs. 2023)

Seasonality
% of same-day trips



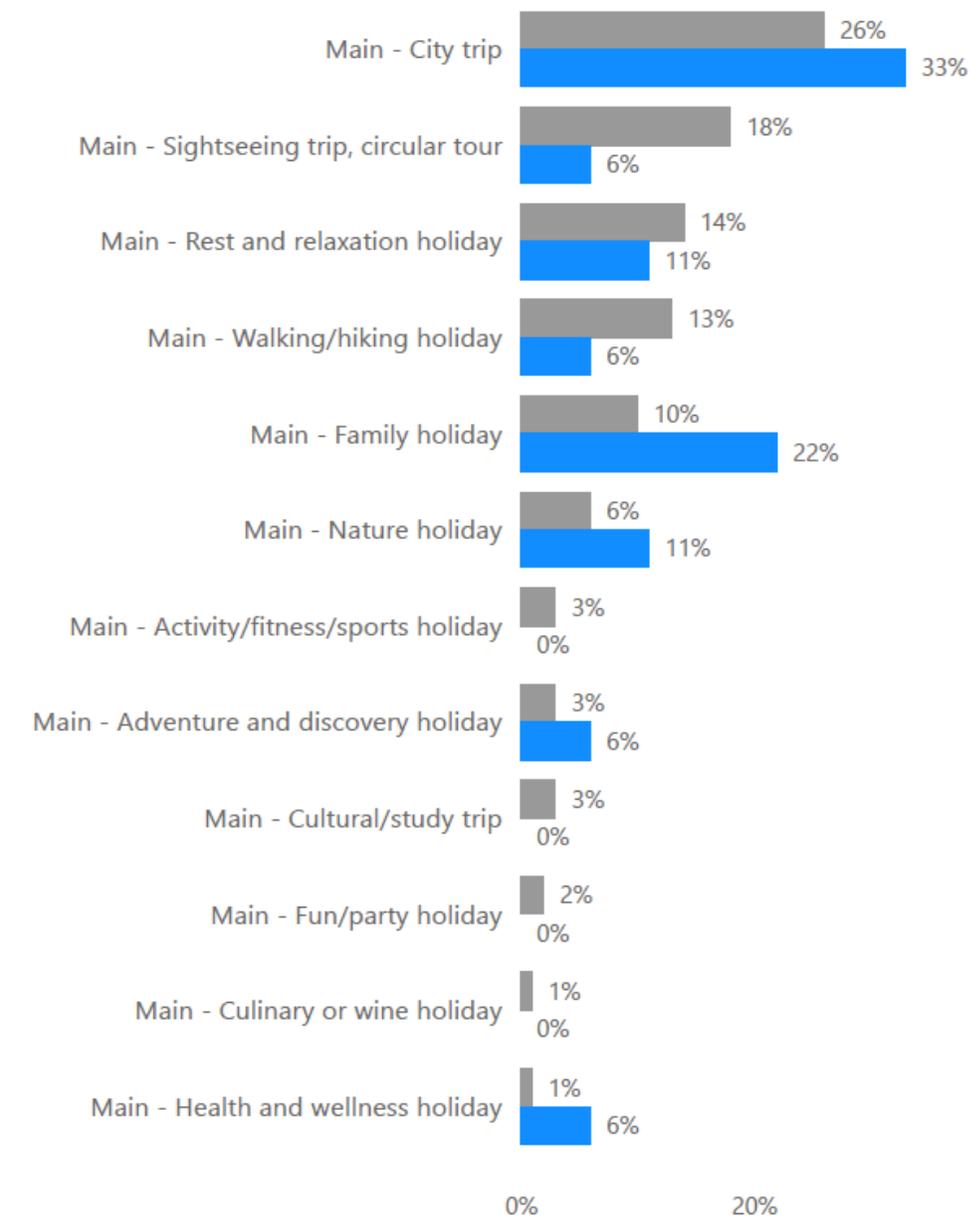


Travel behaviour of inbound leisure visitors

Main holiday types

Visitors with overnight

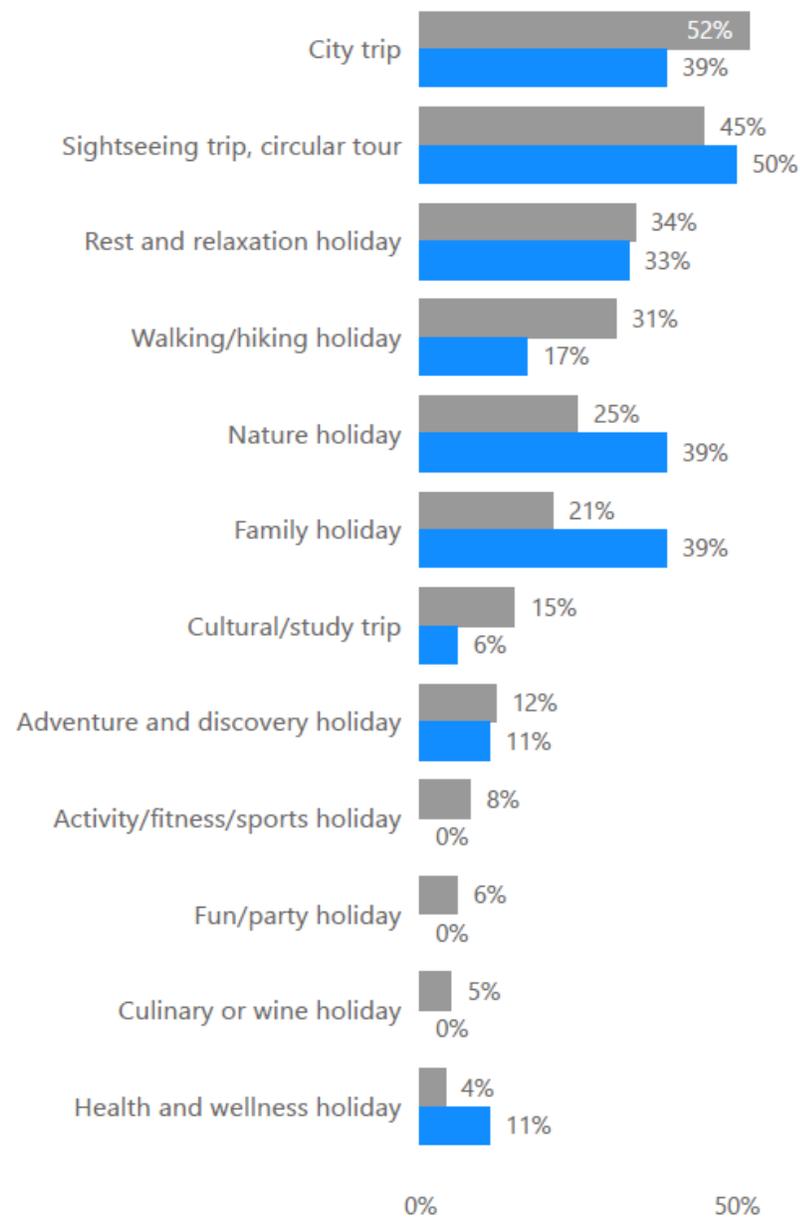
● All Inbound ● Italy



All holiday types

Visitors with overnight

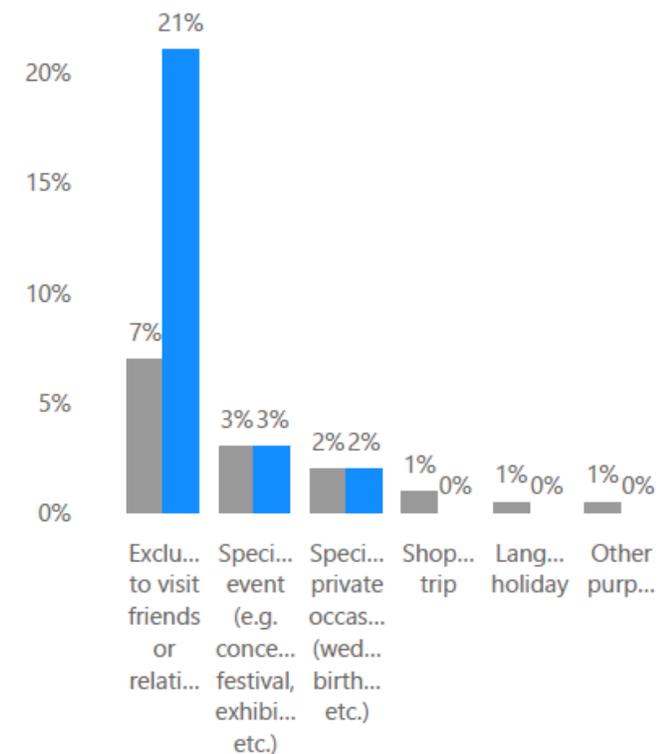
● All Inbound ● Italy



Main purpose of overnight trip

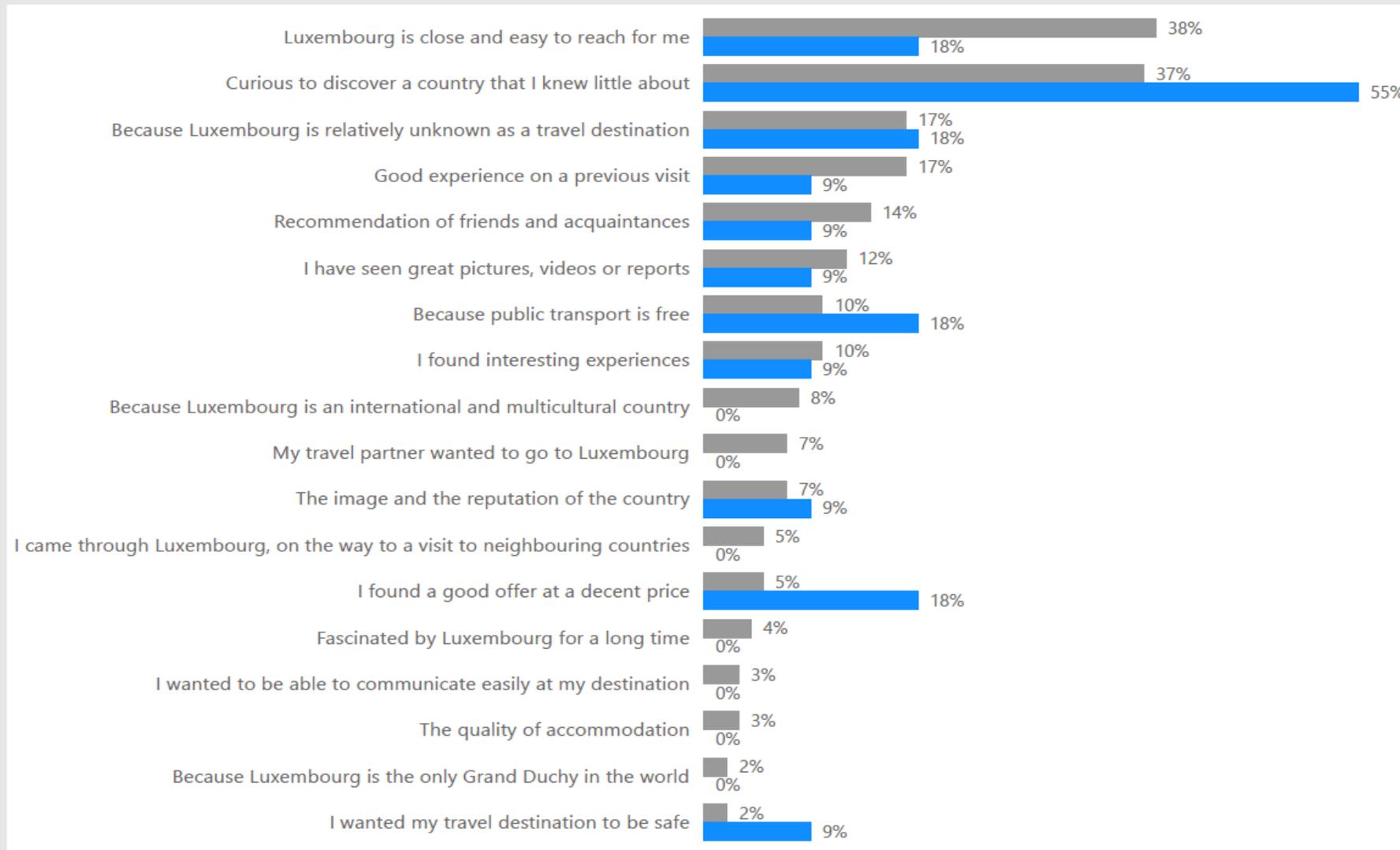
(if not holiday)

● All Inbound ● Italy



Key decision criteria for choosing Luxembourg

Inbound leisure visitors with overnight (*), 2023-2024

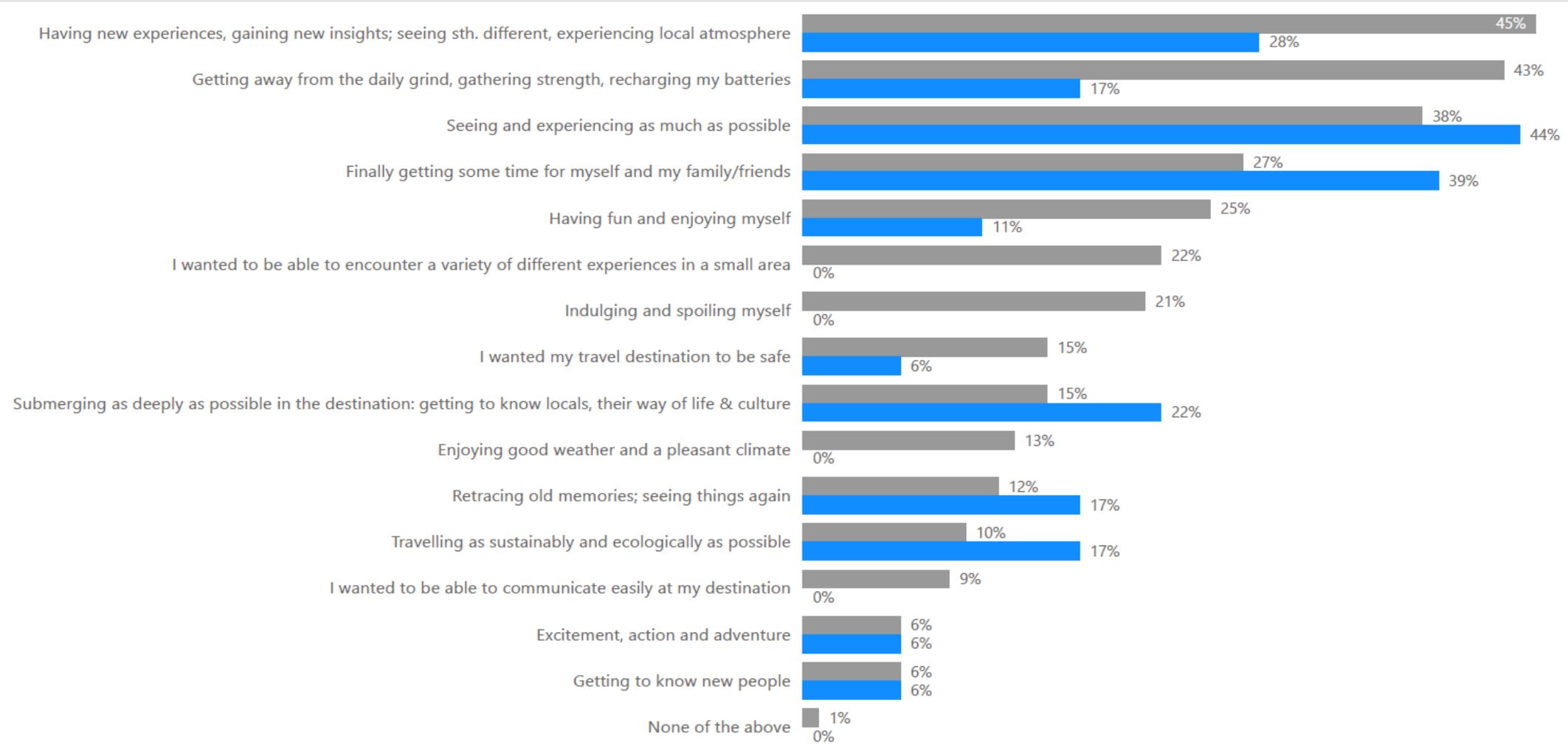


■ All inbound
■ Italy

Source: LFT/Ilres Visitor Survey.
(*) Maximum 3 answers possible.

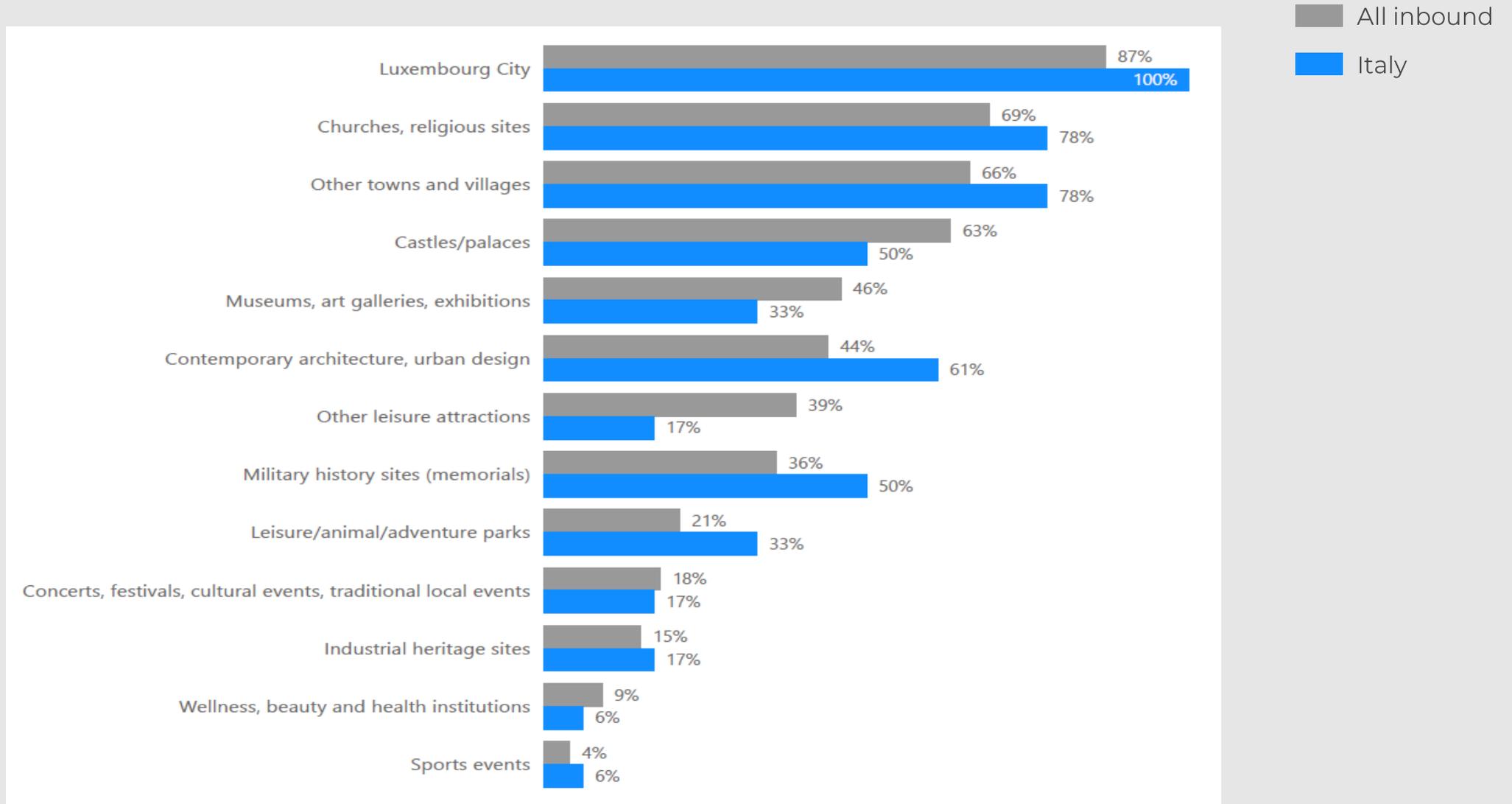
Key travel motives

Inbound leisure visitors with overnight, 2023-2024



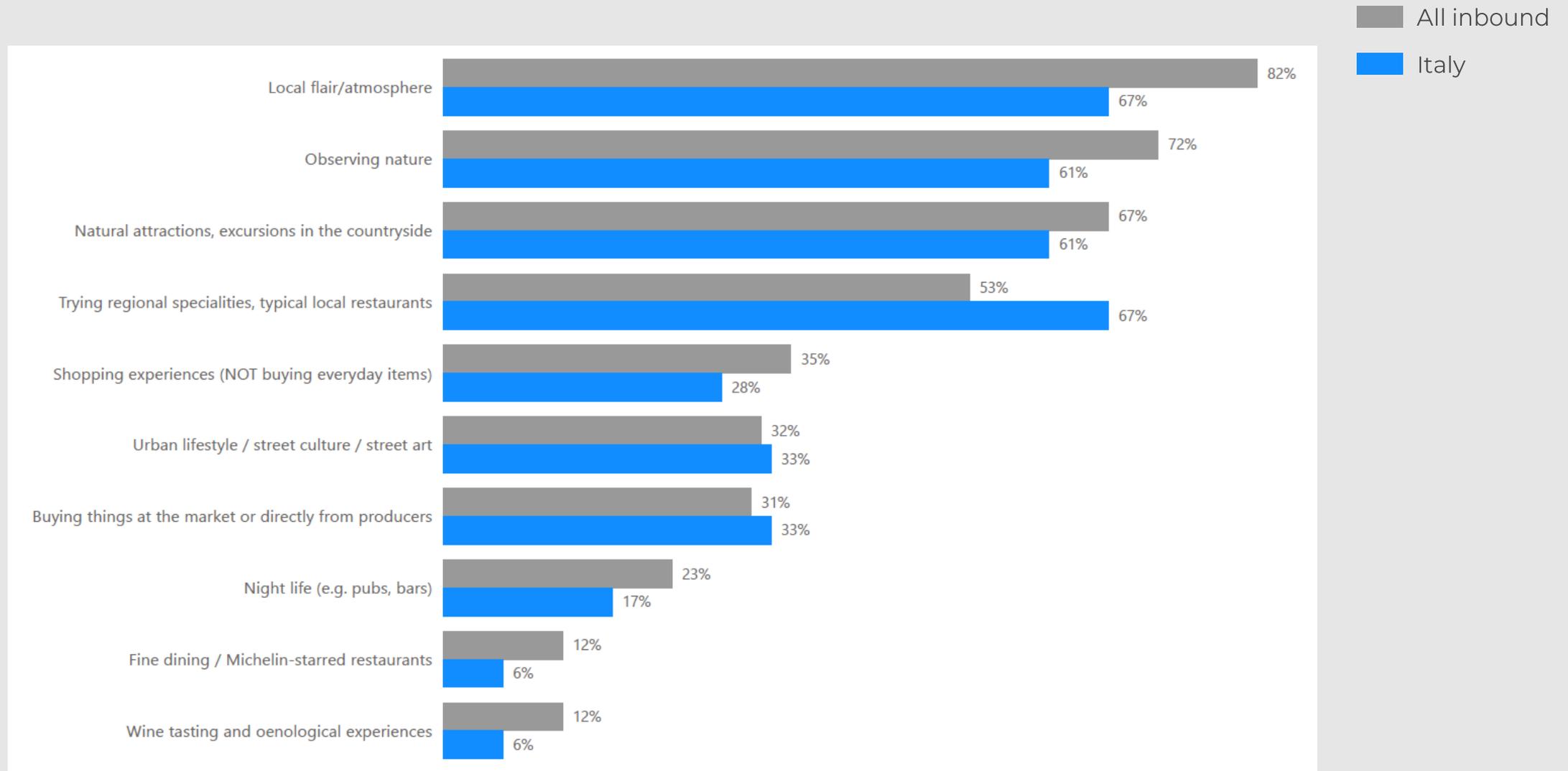
Type of places visited in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



Non-sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



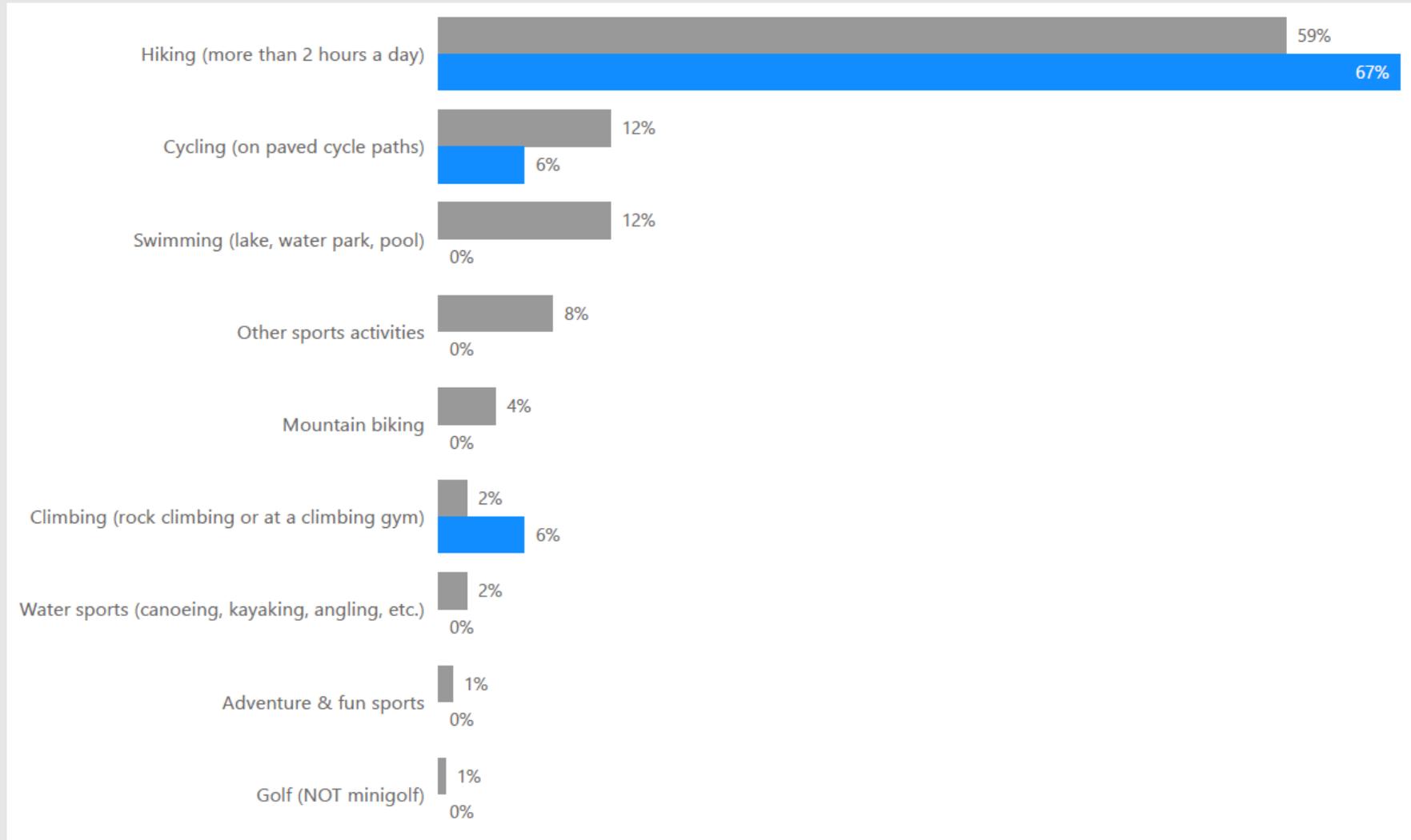
Sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



■ All inbound

■ Italy



Age groups

Inbound leisure visitors with overnight, 2023-2024

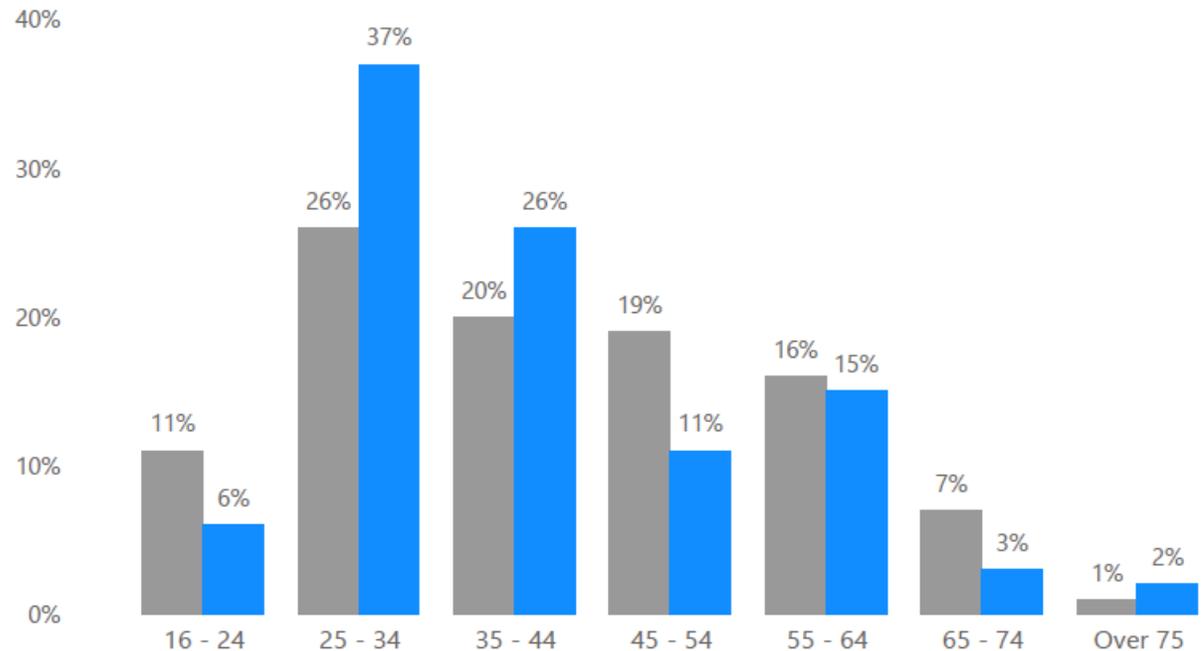


■ All inbound

■ Italy

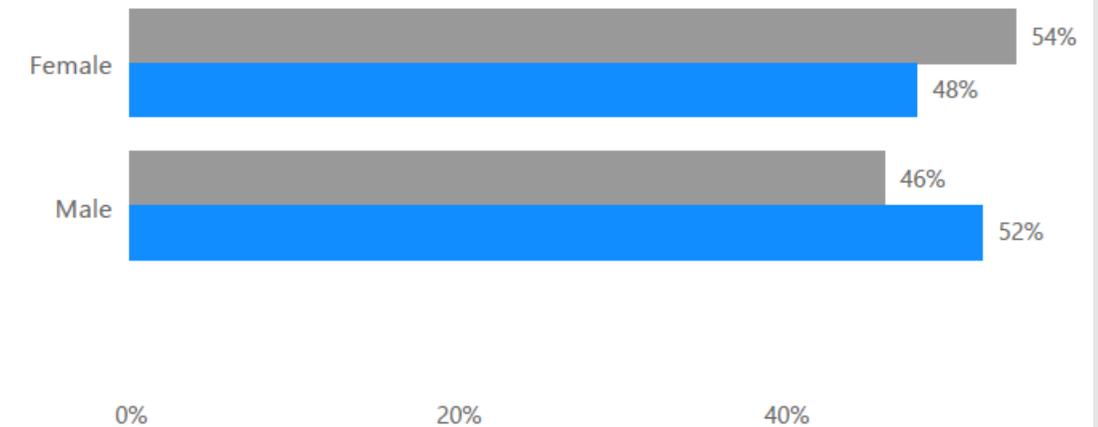
Age

Visitors with overnight



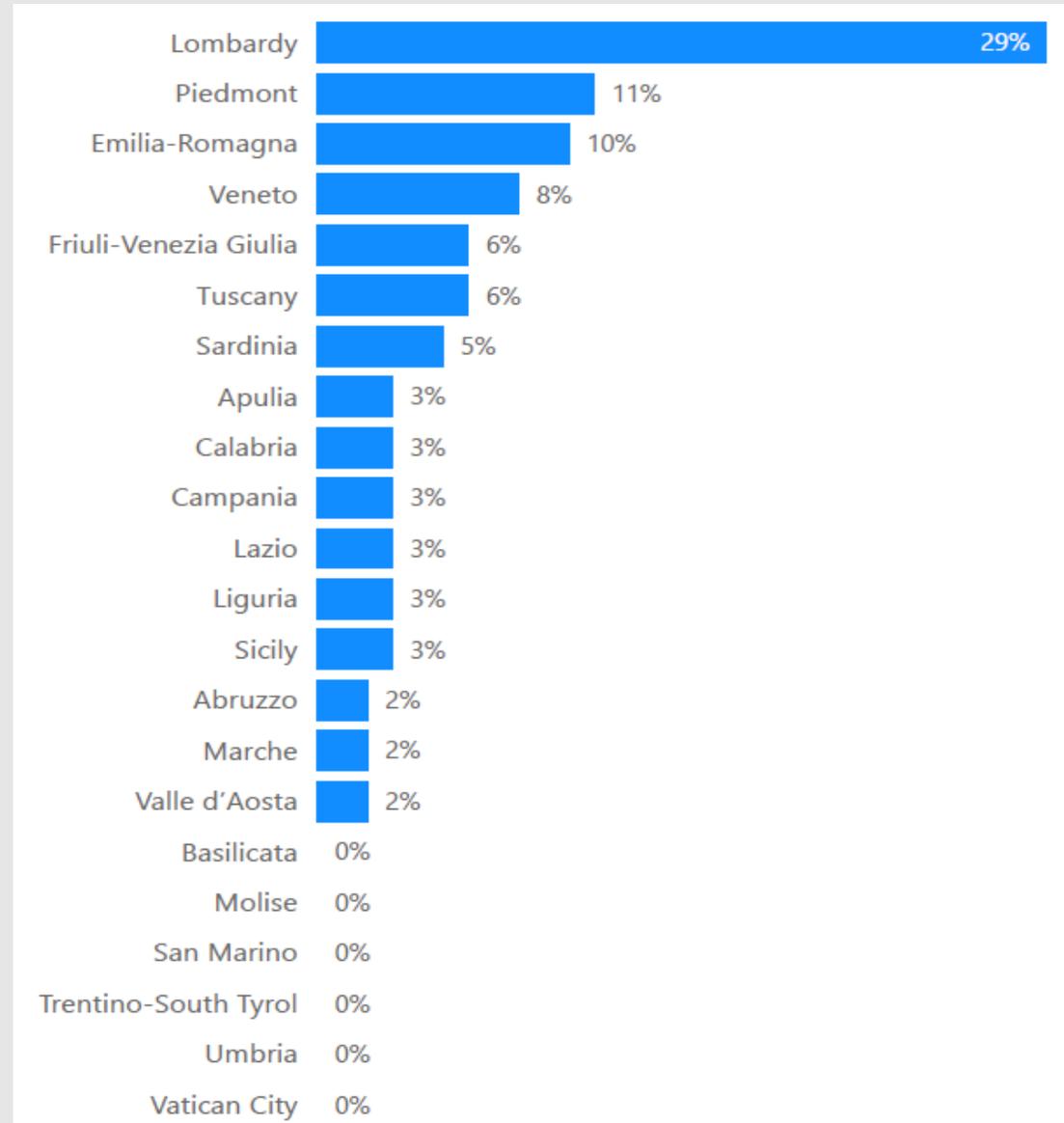
Gender

Visitors with overnight



Region of origin

Inbound leisure visitors with overnight, 2023-2024

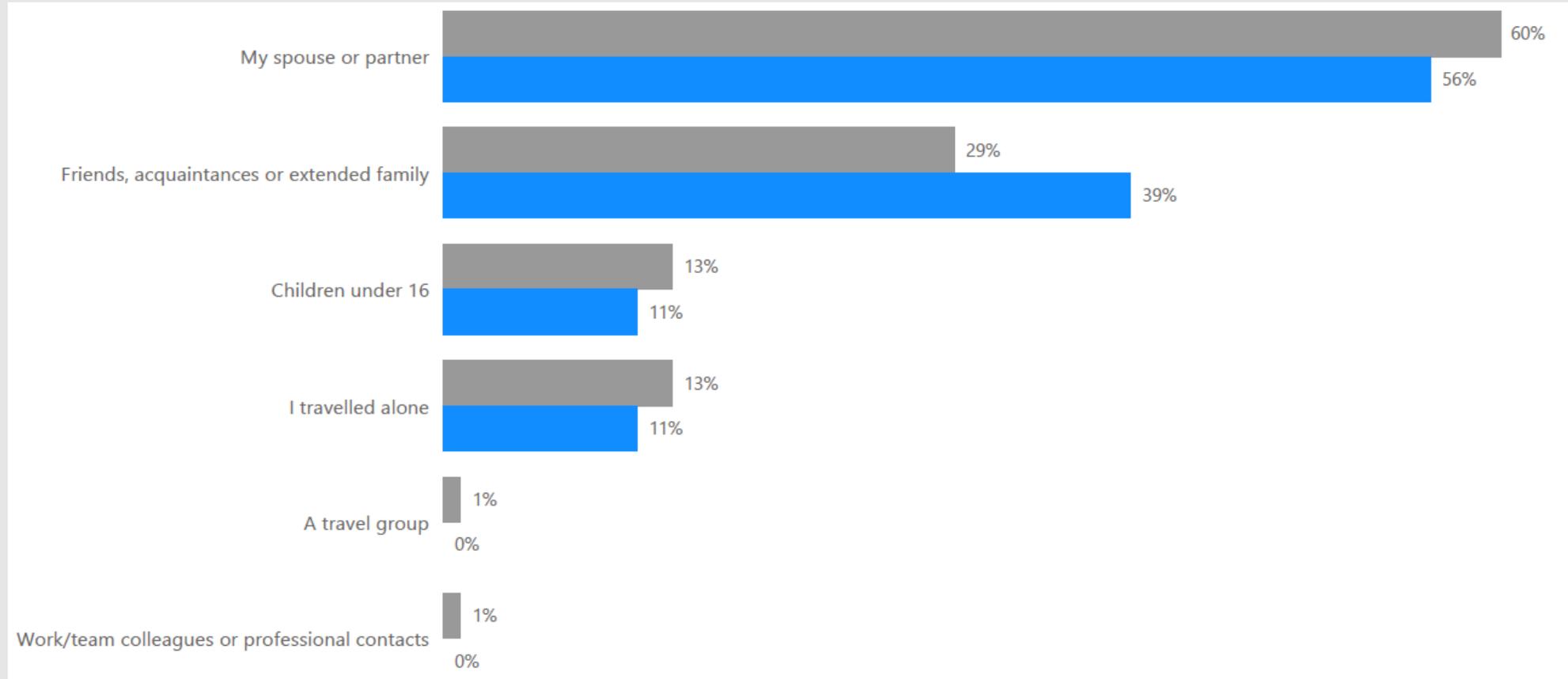


Travel party

Inbound leisure visitors with overnight, 2023-2024



■ All inbound
■ Italy



Transport, new visitors and cross-border trips

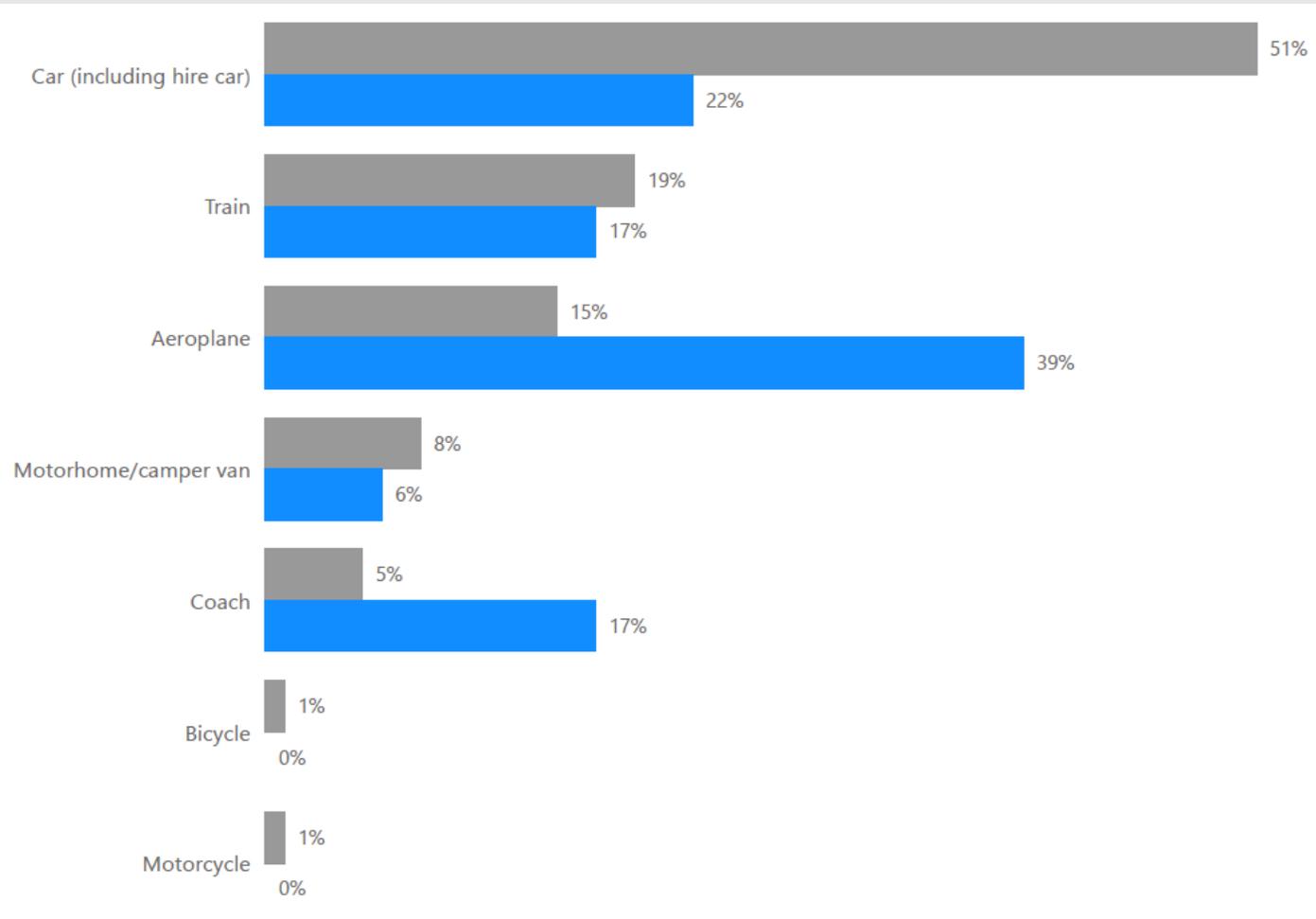
Inbound leisure visitors with overnight, 2023-2024



Mode of transport to access Luxembourg

■ All inbound

■ Italy



First-time visitors

Visitors with overnight

63%

All Inbound

71%

Italy

Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

39%

All Inbound

40%

Italy

Expenditure

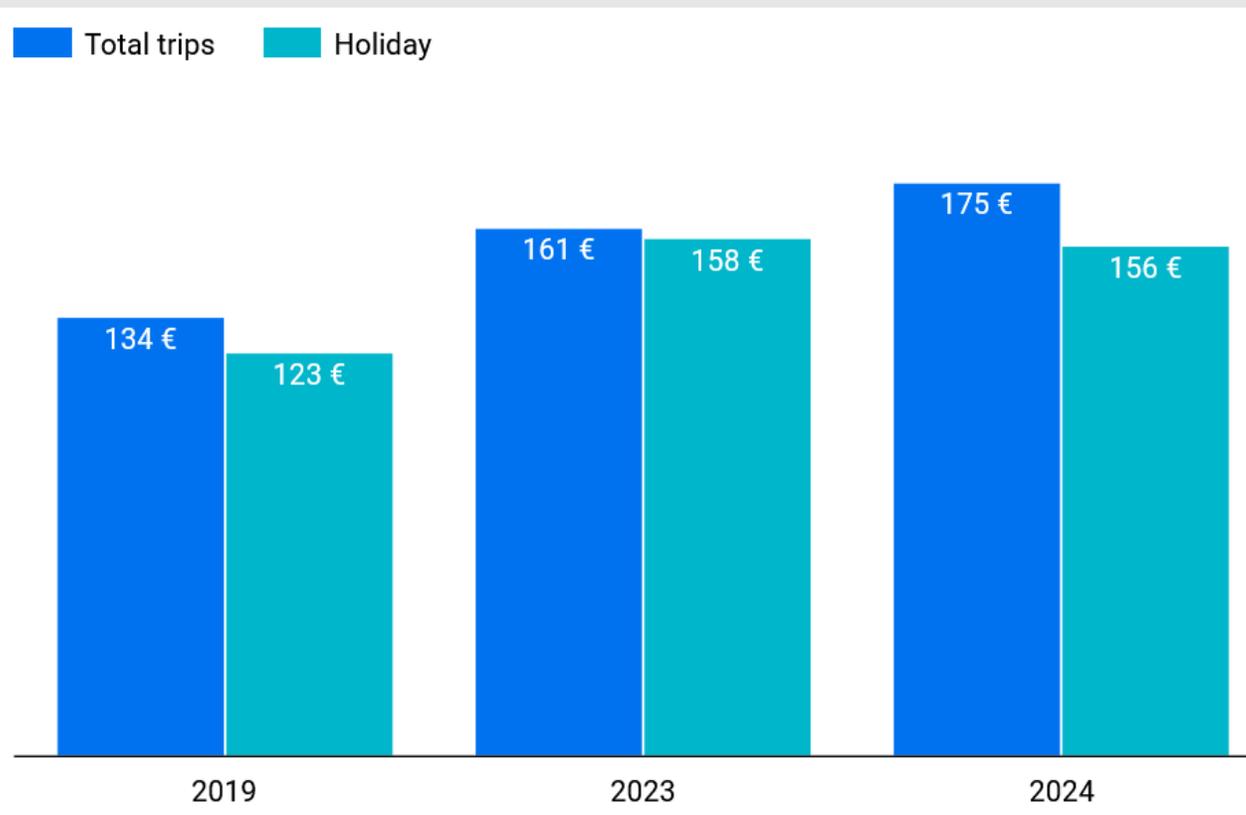


Inbound trips to Luxembourg with overnight (all accommodation)

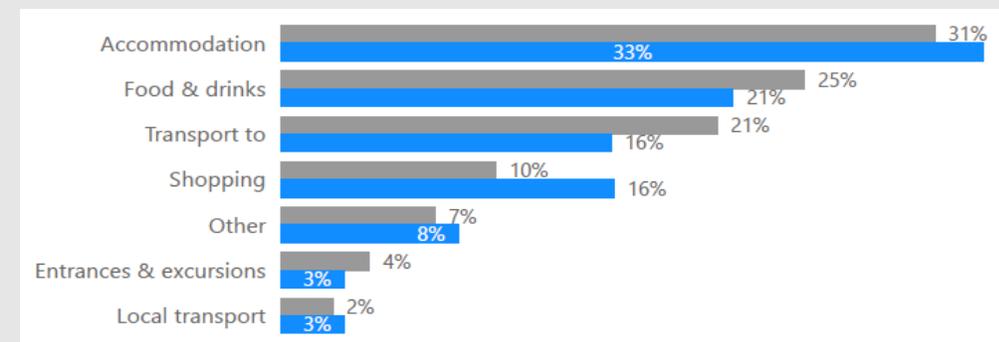
■ All inbound

■ Italy

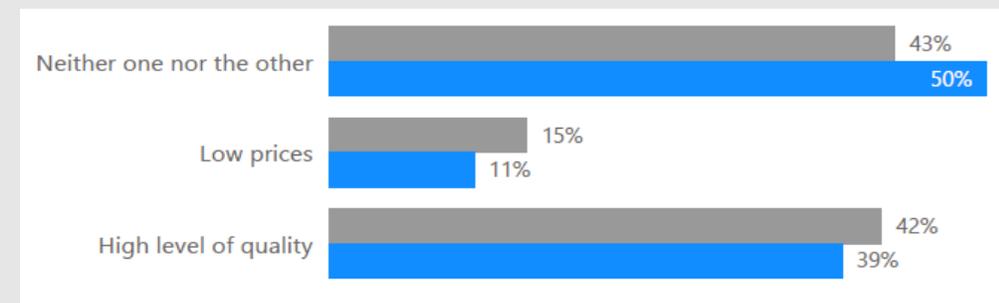
Average expenditure/pers./day



Expenditure of leisure inbound visitors by categories, 2023-2024

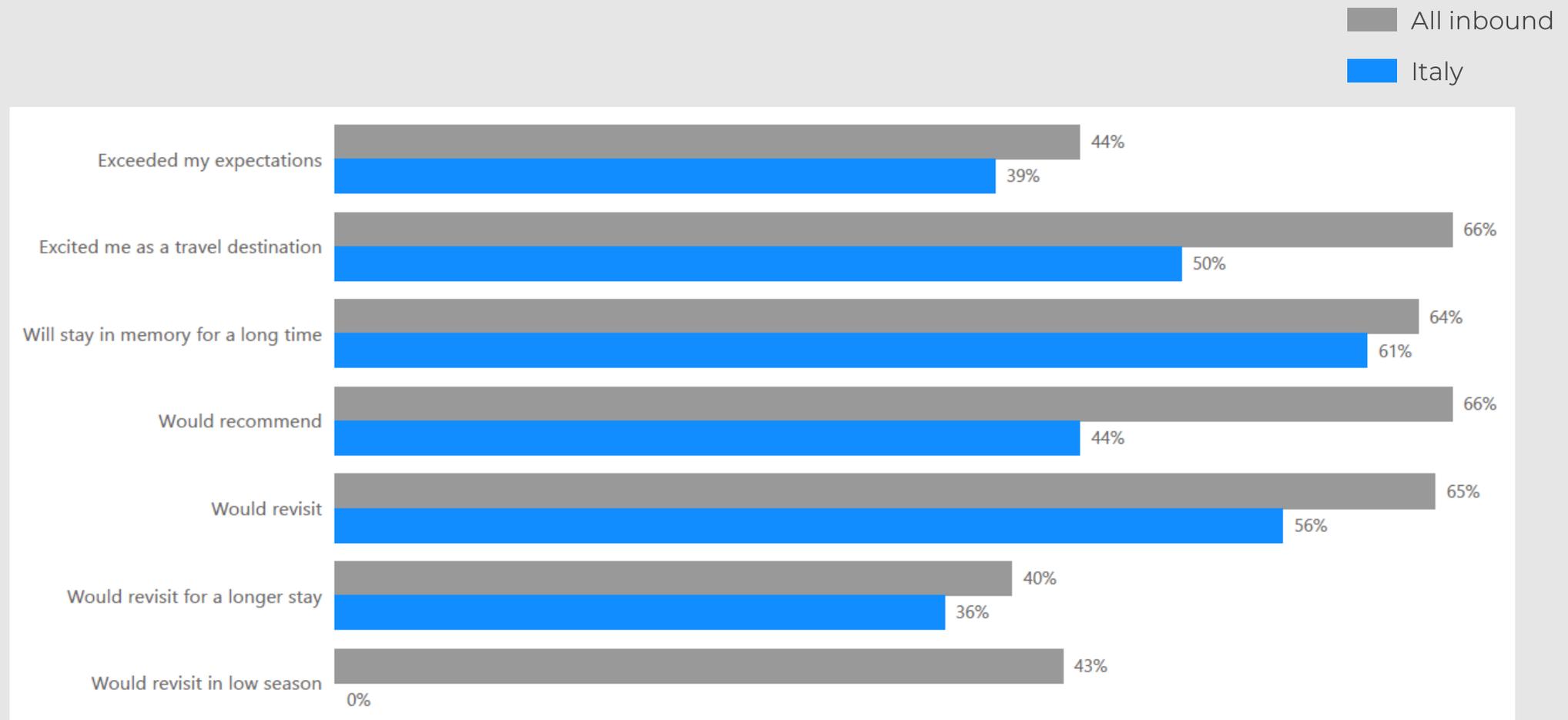


Quality vs. price-orientation of leisure inbound visitors, 2023-2024



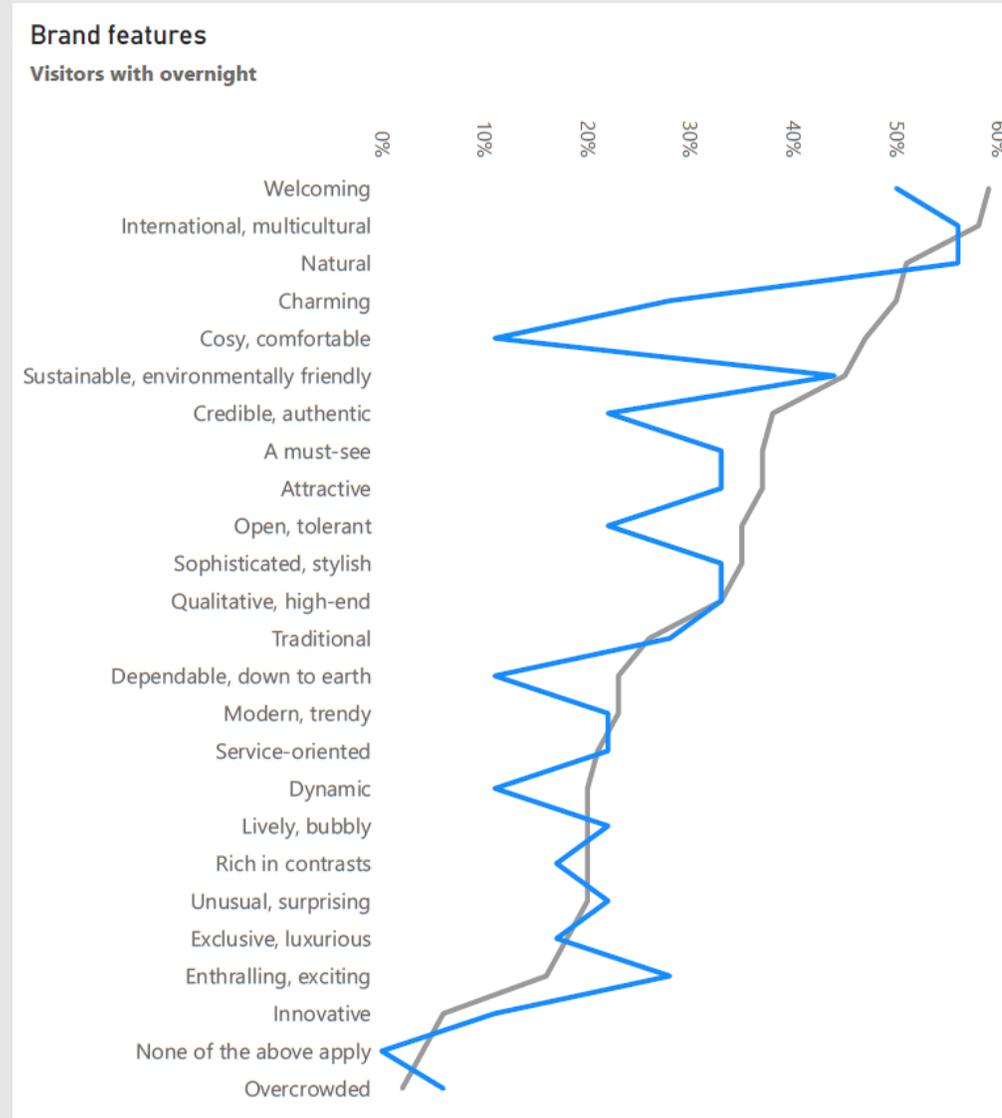
Visitor satisfaction and recommendation

Inbound leisure visitors, 2023-2024



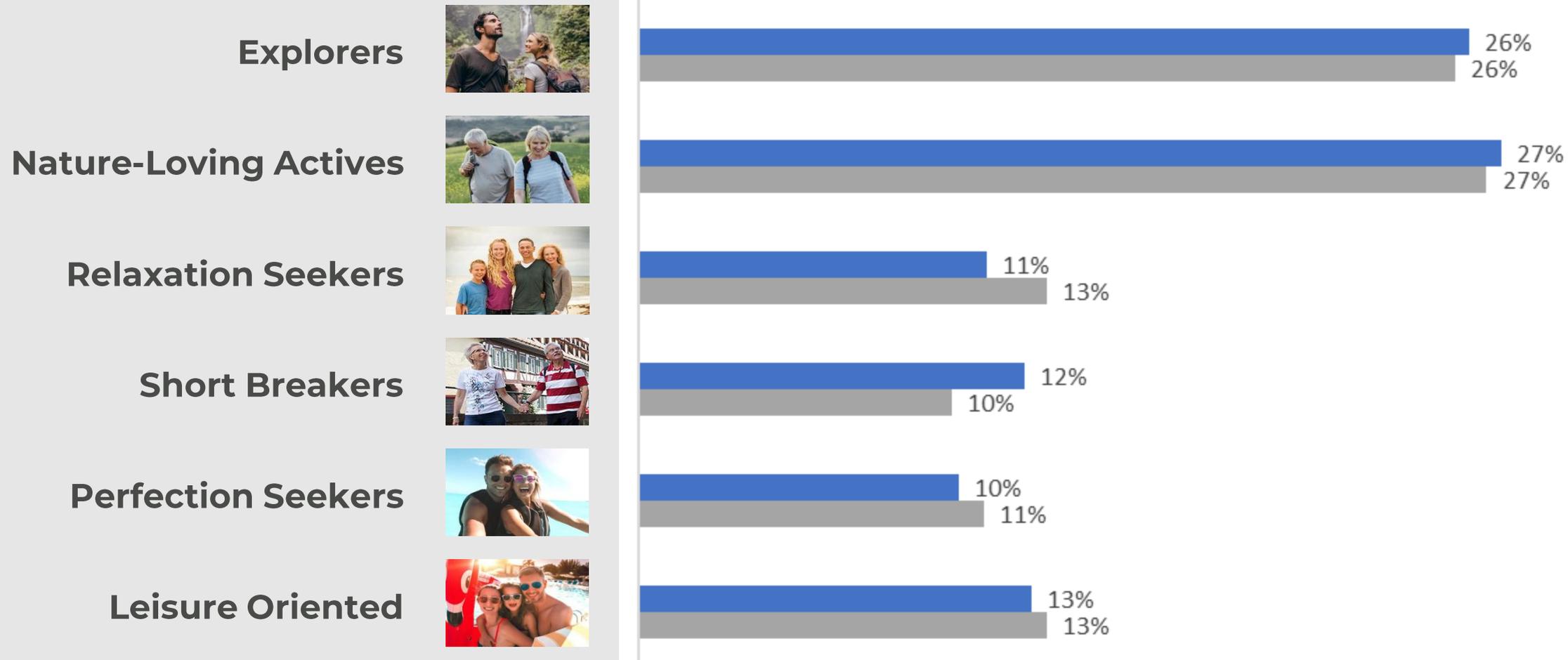
Brand features perception

Inbound leisure visitors with overnights, 2023-2024



■ All inbound
■ Italy

LFT Target Segments

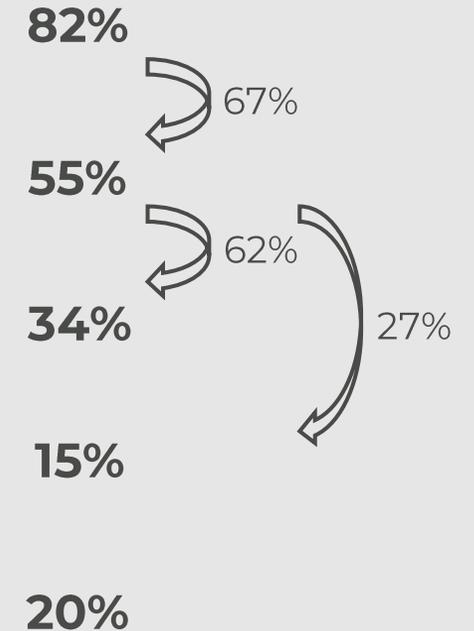
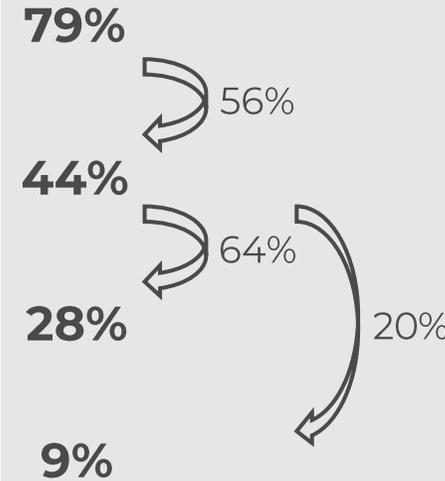
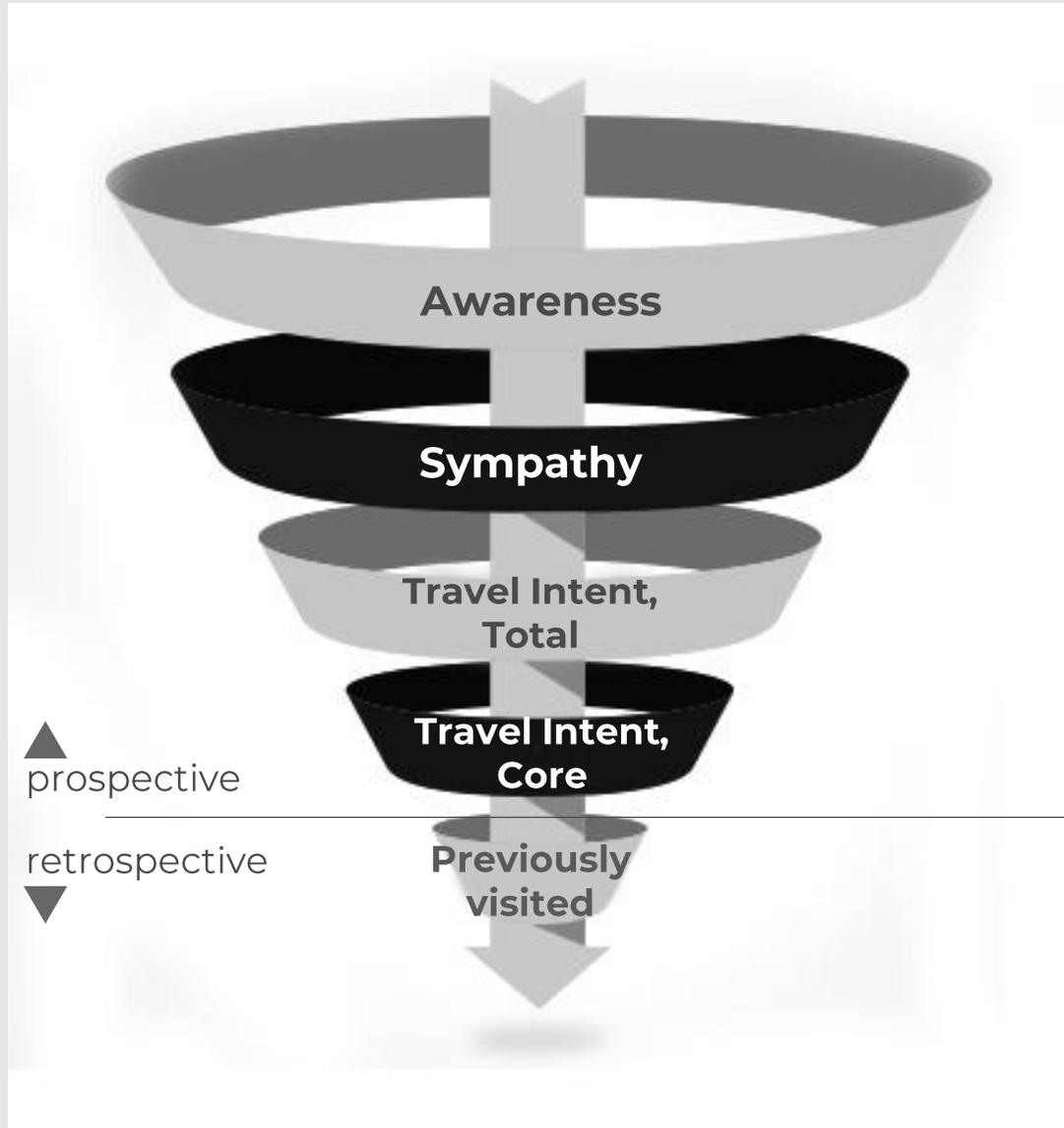




Target segments, Brand & Growth Potential

Destination Luxembourg - Brand Funnel 2024

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

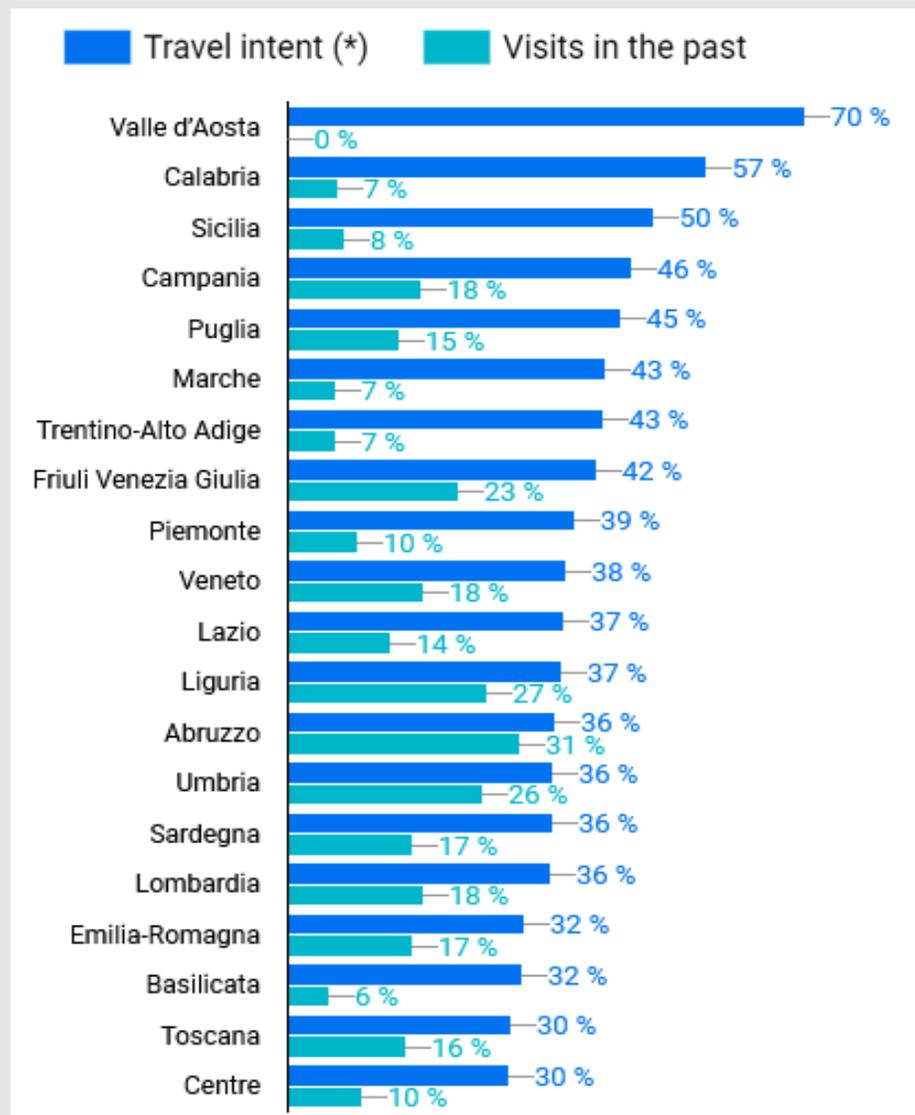


10%

20%

Regional origin 2024

Past visitors and future potential



General theme interest (*)



Theme				Theme (continued)			
	Rank	Rank	% interested		Rank	Rank	% interested
Sightseeing	4	1	75%	Fun/entertainment	8	20	60%
Culinary	2	2	74%	Events	16	21	57%
Nature	3	2	74%	Travelling by train	18	22	57%
History/Unesco	10	4	74%	Countryside	22	23	54%
Immersive travel	6	5	73%	Nightlife (**)	20	24	54%
Architecture/townscapes	7	6	73%	Wine	21	25	52%
City	5	7	73%	Adventure/action	19	26	47%
Castles	9	8	72%	Active-sports	27	27	47%
Culture	11	9	71%	Wellness	25	28	47%
Learning/new skills	14	10	71%	Shopping	23	29	46%
Resting/Relaxation	1	11	70%	Film locations	30	30	45%
Gardens/parks		12	70%	Remembrance	26	31	43%
Hiking	17	13	67%	Industrial heritage	28	32	41%
Trad./folk festivals/mkts		14	67%	Luxury	24	33	35%
Road trips, scenic drives		15	65%	Camping	29	34	35%
Family	12	16	65%	Water sports		35	32%
Sustainability	15	17	63%	MTB	32	36	31%
Bathing (in lakes, waters)		18	61%	Cycling	31	37	27%
Exchanging with locals	13	19	61%	Motorcycling	33	38	24%

(*) 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).

Note: Some themes are only surveyed for Italy and Spain (n= 38) and thus have no ranking for Europe (n= 33).

Luxembourg's Theme Competence (*)



Theme			
	Rank	Rank	% agreeing
Castles	7	1	41%
City	1	2	37%
Culture	6	3	36%
Nature	5	4	34%
Gardens, parks		5	34%
Architecture/townscapes	4	6	32%
Resting/Relaxation	2	7	32%
Culinary	3	8	29%
Family	8	9	29%
Hiking	11	10	28%
History/Unesco	12	11	27%
Luxury	9	12	27%
Road trips, scenic drives		13	26%
Events, cultural		14	25%
Fun/entertainment	13	15	22%
Shopping	10	16	22%
Nightlife (**)	14	17	21%
Sustainability	18	18	21%
Wellness	16	19	20%
Countryside	17	20	20%
Wine	15	21	20%
Remembrance	26	22	16%
Action, adventure	22	23	16%
Industrial heritage	24	24	16%
Camping	19	25	15%
Active-sports	21	26	15%
Bathing in lakes, waters		27	14%
MTB	25	28	13%
Events, sport		29	12%
Cycling	20	30	12%
Water sports		31	9%

(*) 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.

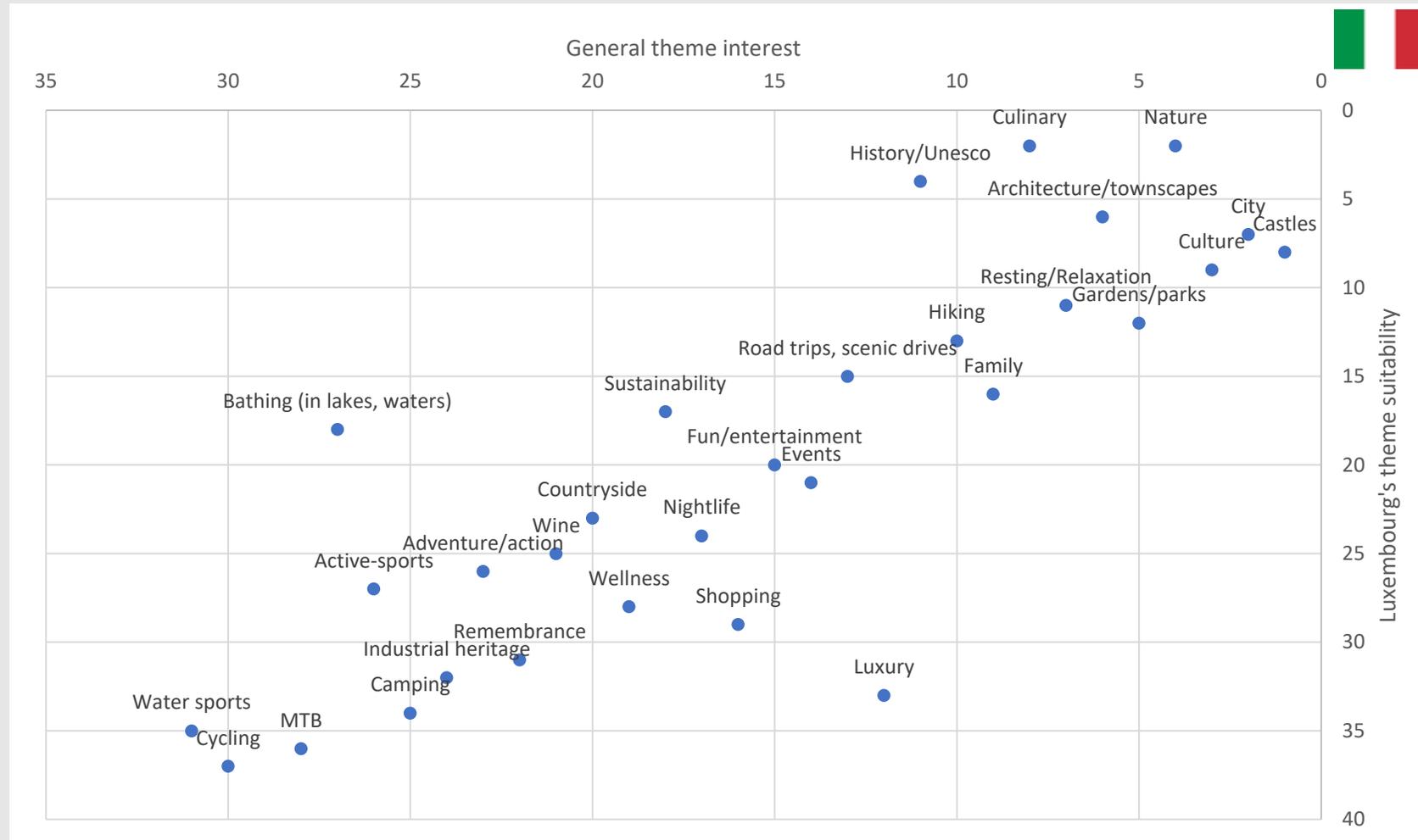
(**) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters)

Note: Some themes are only surveyed for Italy and Spain (n= 31) and thus have no ranking for Europe (n= 26).

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
clean	2	1	46%
safe	1	2	42%
of high quality	3	3	37%
open-minded, tolerant, international	6	4	33%
welcoming, hospitable	4	5	33%
exclusive, luxurious	8	6	31%
authentic, real	5	7	30%
dynamic, modern	9	8	28%
sustainable	15	9	27%
service oriented	10	10	27%
attractive, appealing	7	11	26%
unique		12	26%
not overcrowded / insider tip	14	13	25%
surprising	11	14	25%
varied, diversified	12	15	25%
lively, trendy	13	16	20%
affordable	16	17	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.

The brand value „unique“ is only surveyed for Italy and Spain and thus has no average for Europe

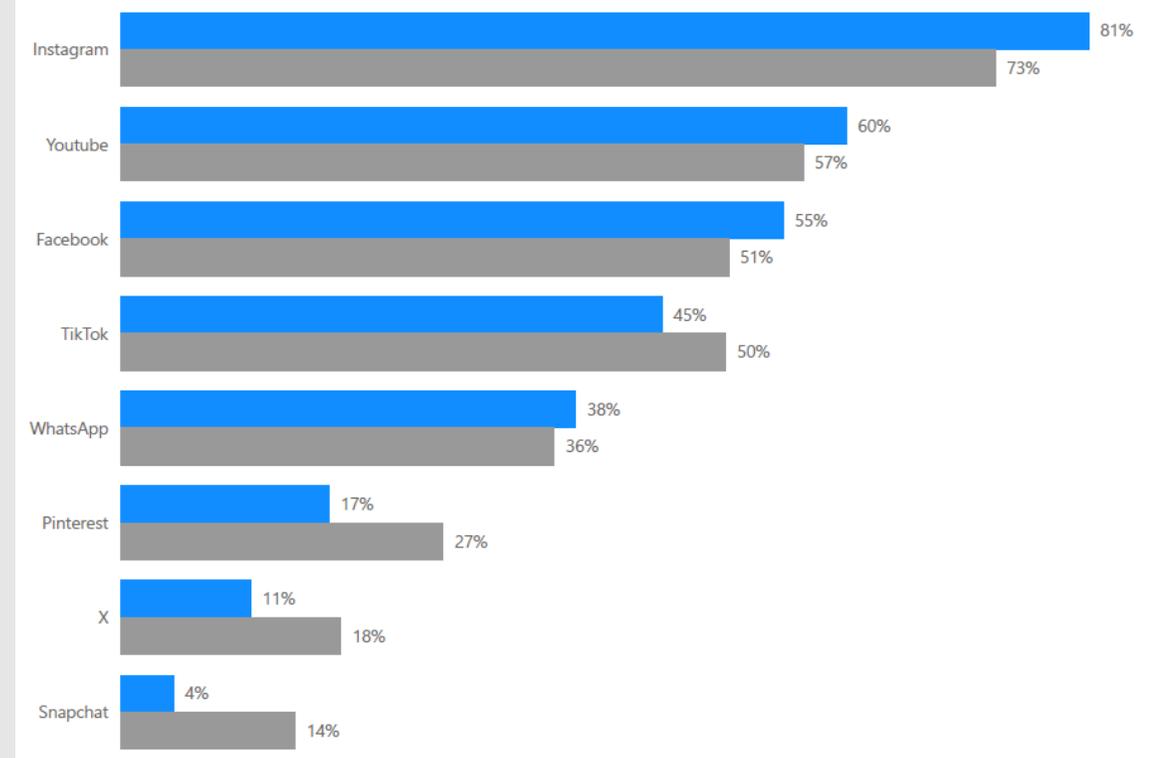
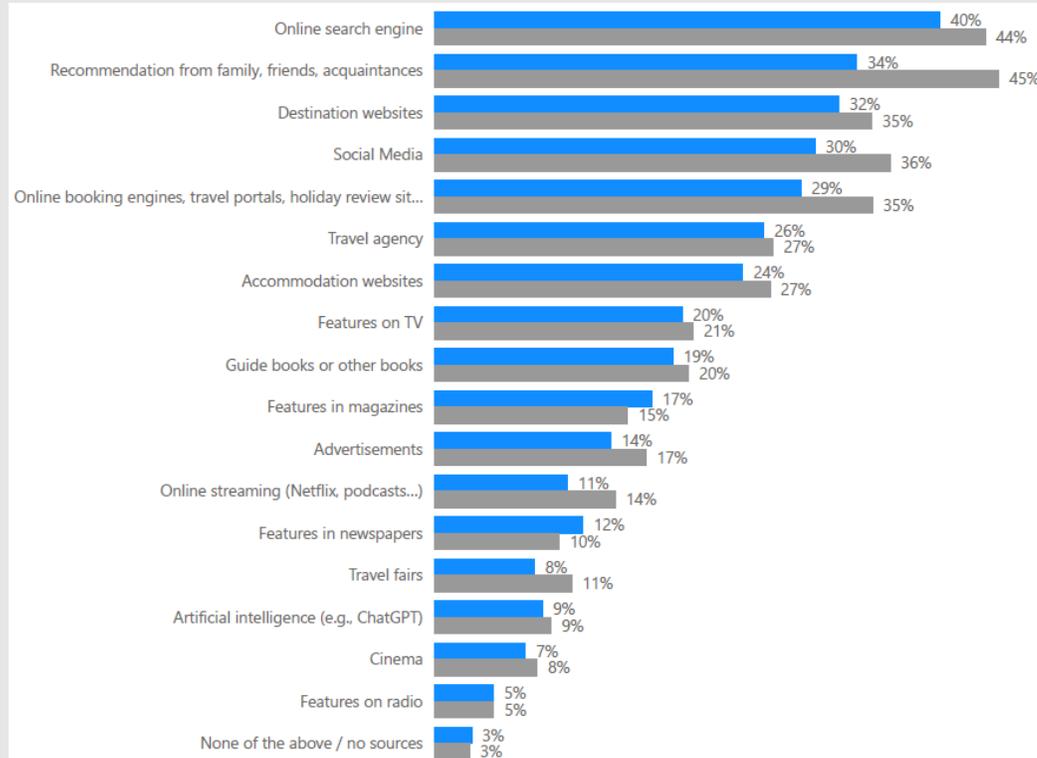
Trip organisation and preferences (1)

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



Italy
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)

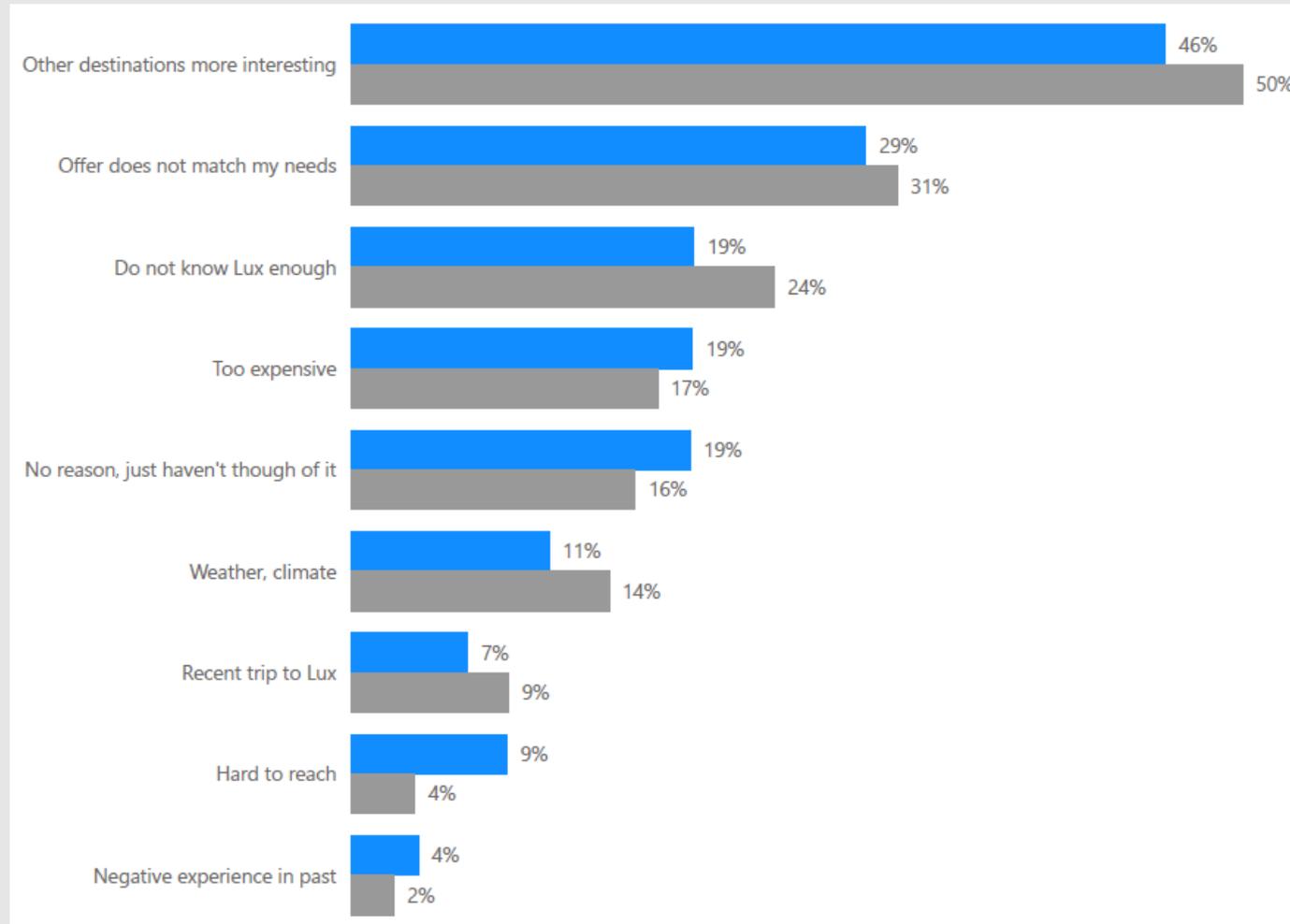


Trip organisation and preferences (2)

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



Reasons for not considering Luxembourg as a destination



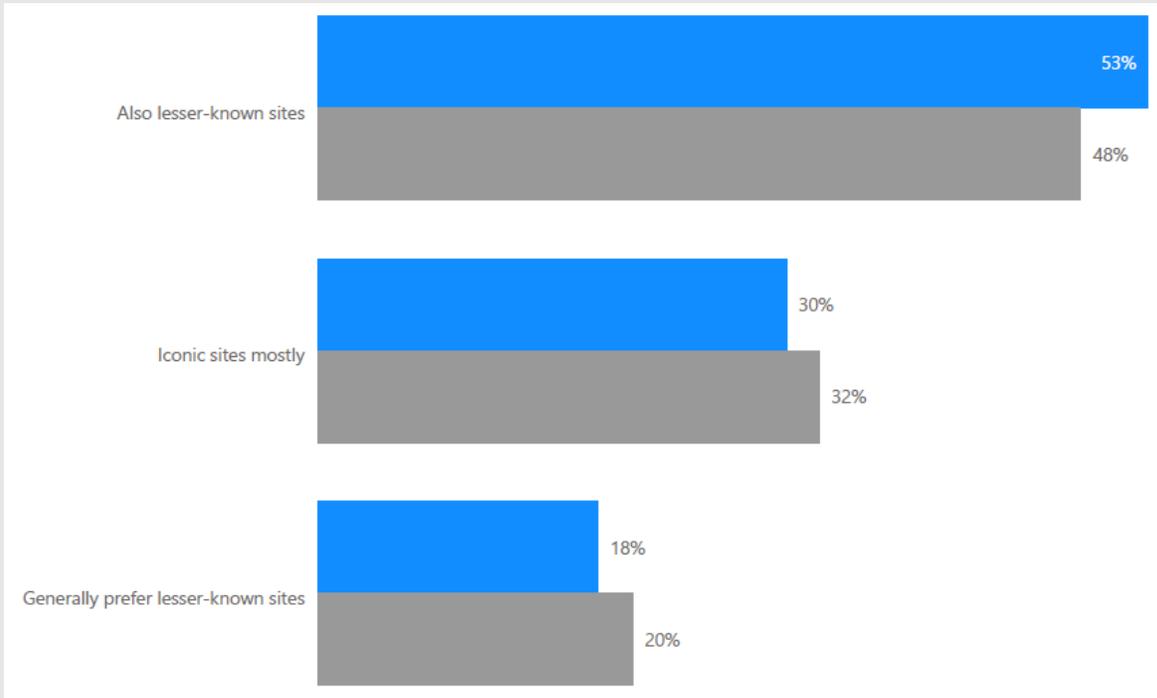
Italy
All inbound

Trip organisation and preference (3)

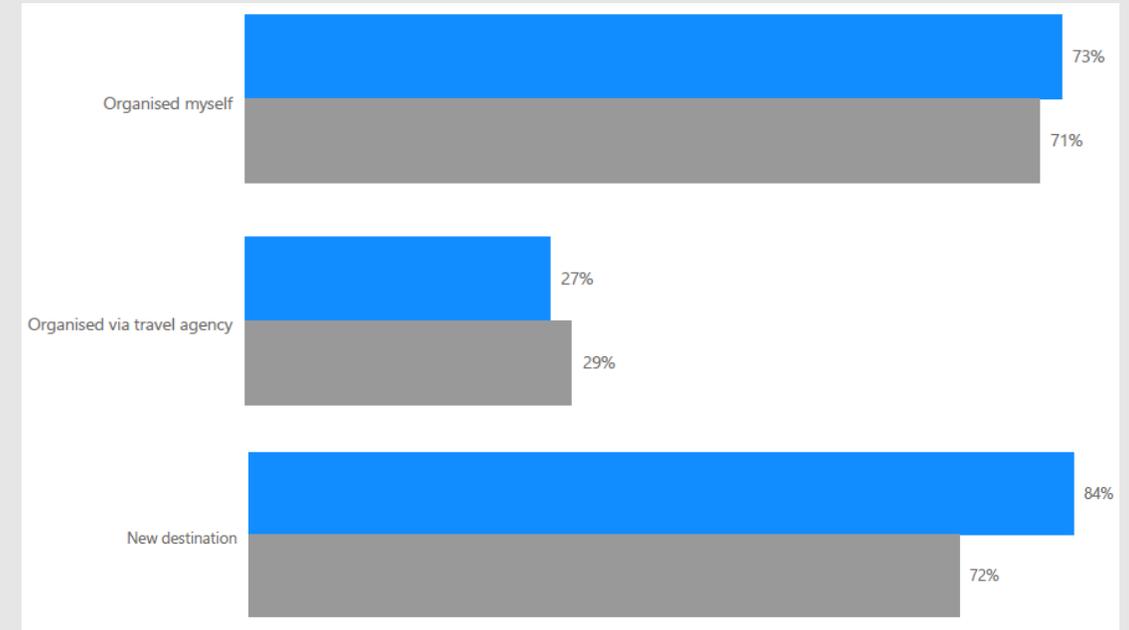
— Average **European source markets**, total vs. Italy



General preference for visiting iconic vs. lesser-known sites



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



Italy
All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



Your contact

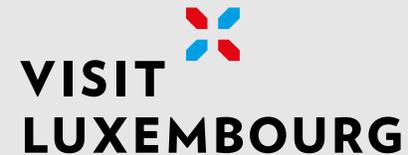


Alain Krier

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