



Luxembourg for Tourism  
**Market profile**  
**ITALY**  
**2024**



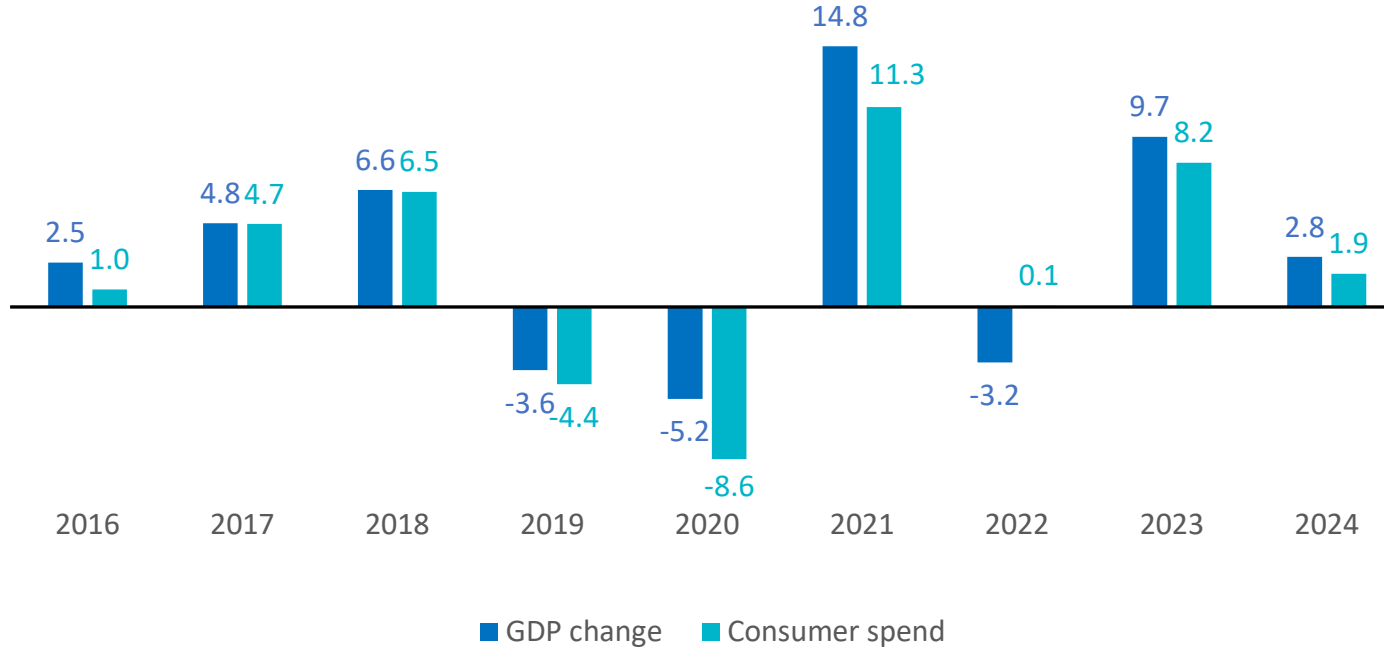


# **Economic indicators & General Travel Demand**

# Economic indicators – General travel demand



## GDP and consumer spending, % annual change



## Economy & population

**GDP (\$) per capita**  
40,210.65

**Unemployment (%)**  
6.58

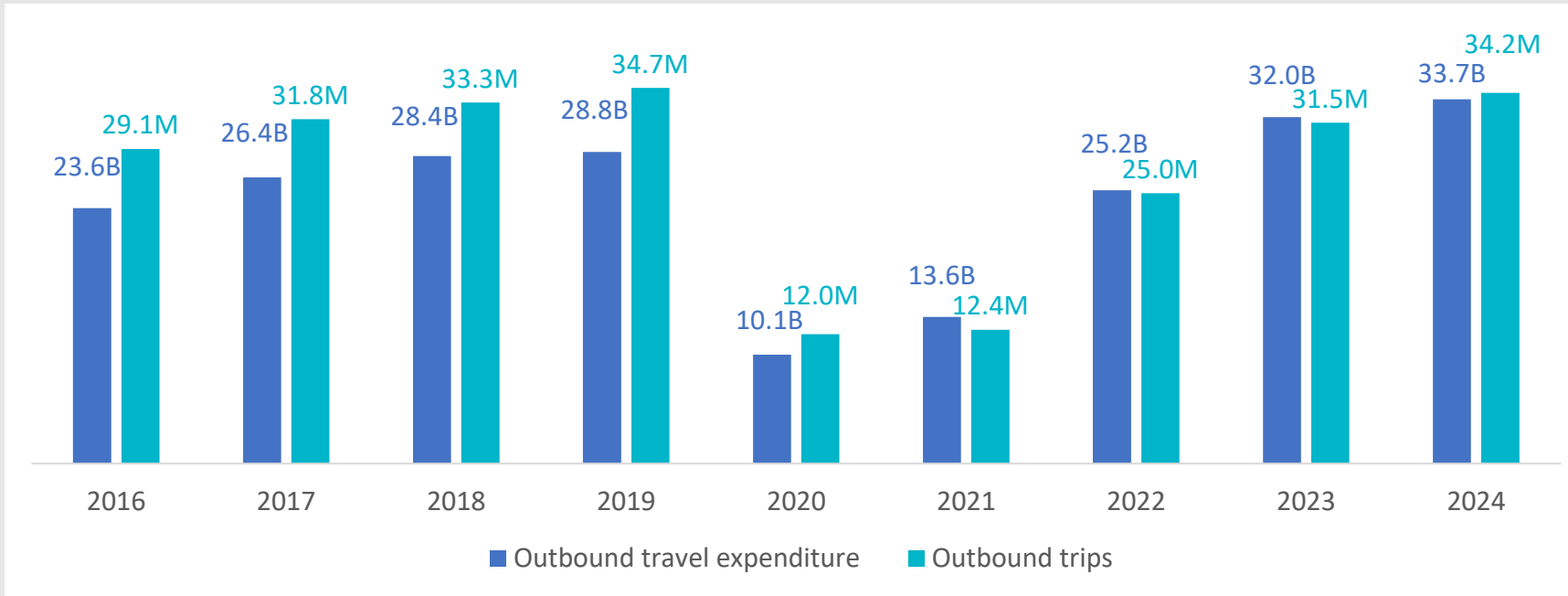
**Inflation(%)**  
0.98

**Population**  
58,918,290

# Economic indicators – General travel demand



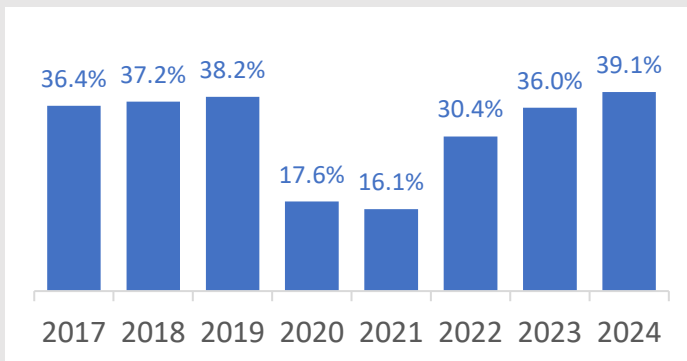
## Outbound trips and travel expenditure



**Outbound travel intensity**  
**0.58 trips**  
per inhabitant (2024)

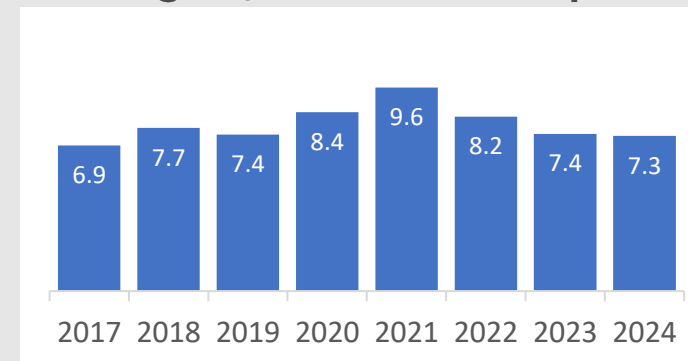
**Average spend**  
per outbound trip (2024)  
**983 \$**

## 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

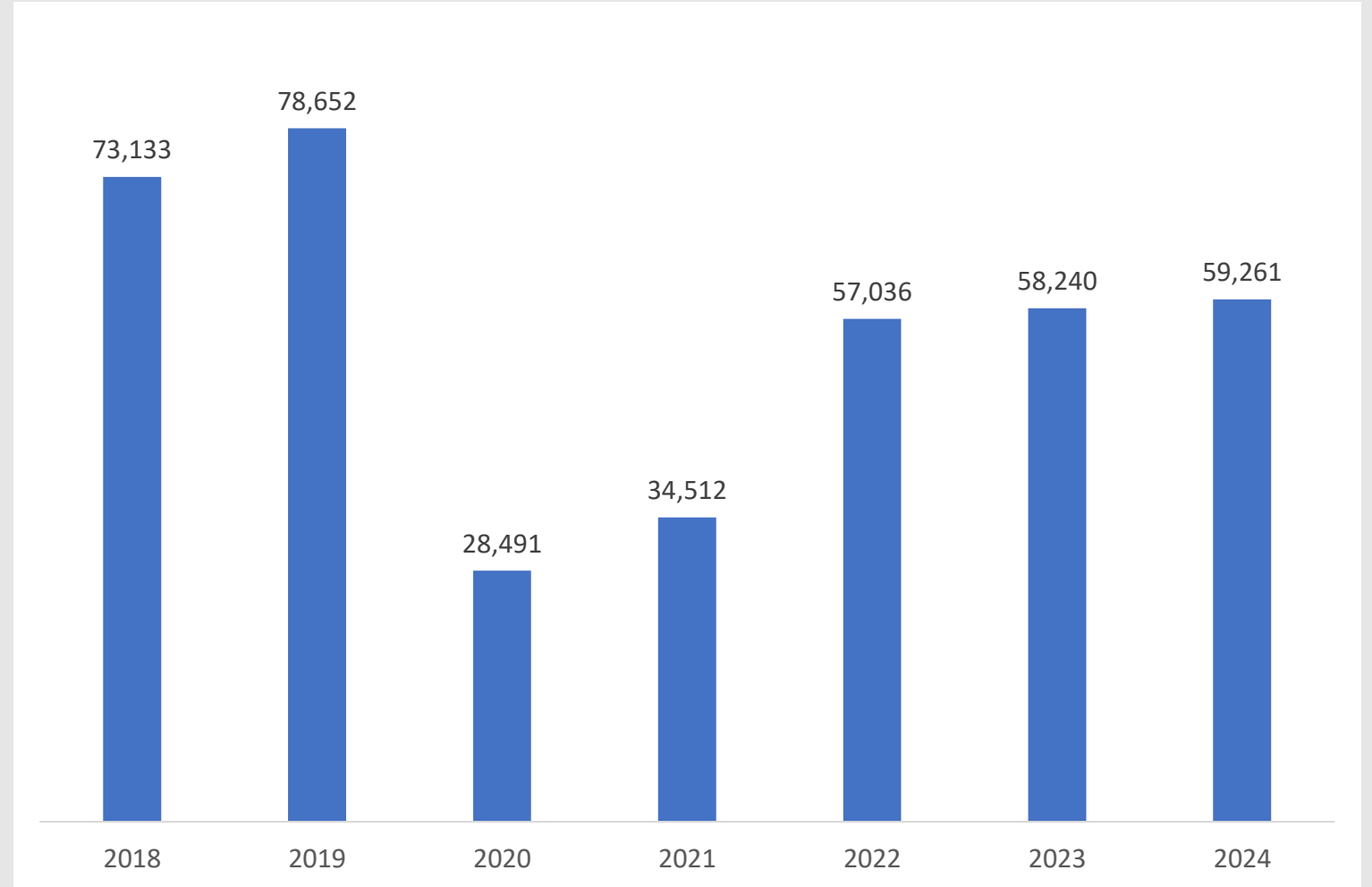


Nights,  
paid accommodation, 2024



**+2% (vs. 2023)**

**-25% (vs. 2019)**

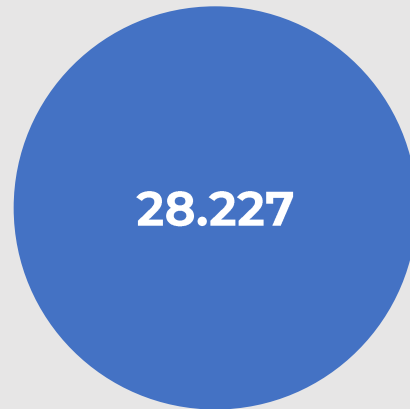


# Arrivals in paid accommodation

## 2024 and 2018-2024

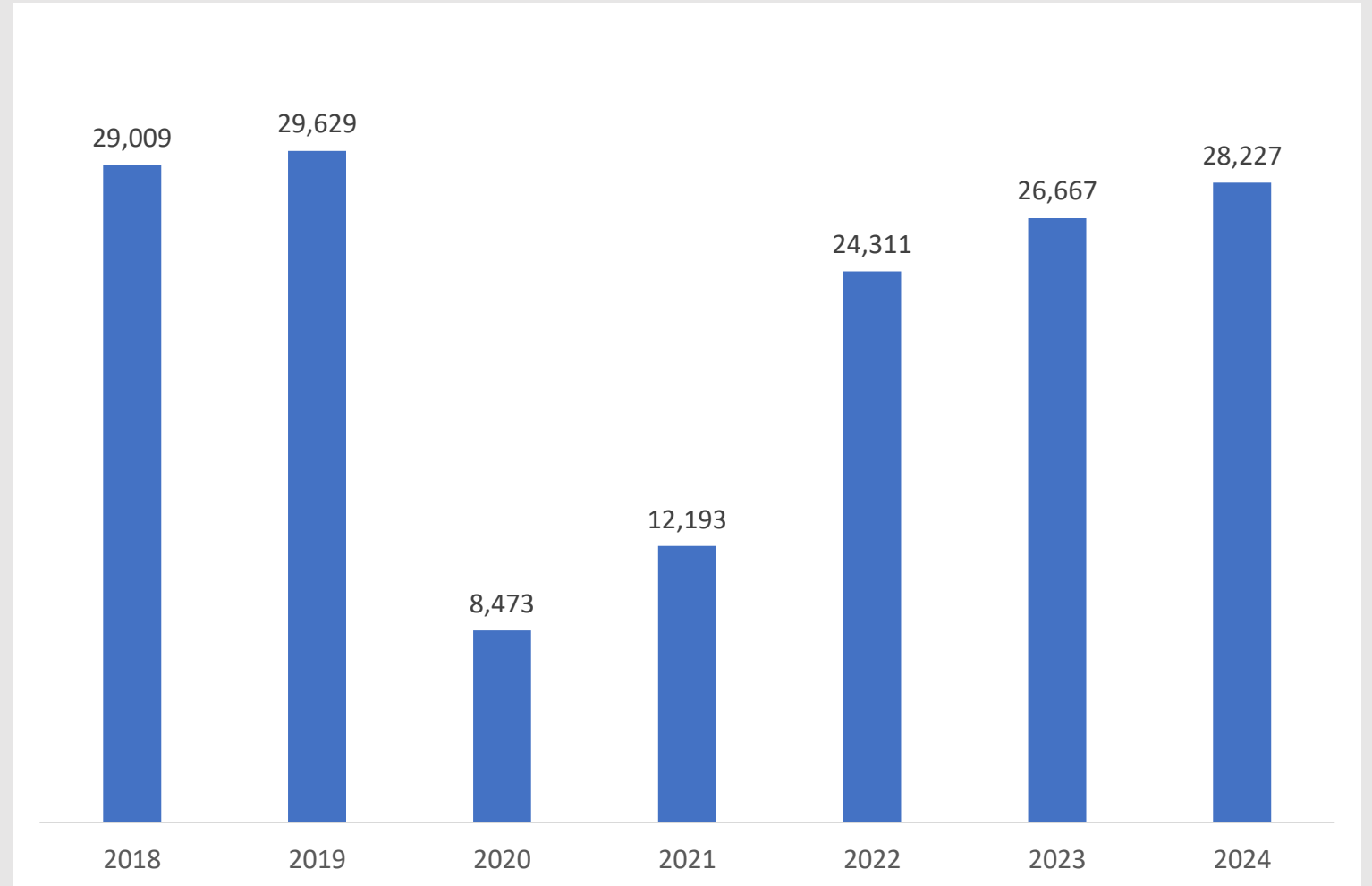


Arrivals,  
paid accommodation, 2024



+6% (vs. 2023)

-5% (vs. 2019)



# Length of stay, paid accommodation

## 2024 and 2018-2024

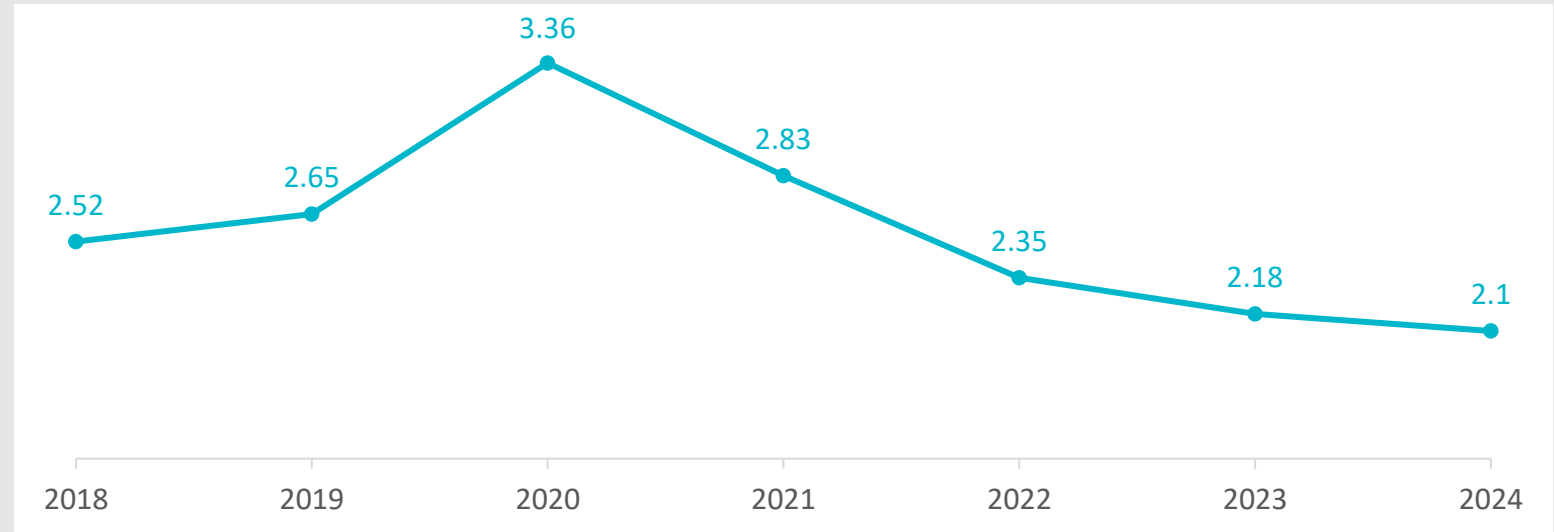


Average length of stay,  
paid accommodation, 2024



-0.08 nights (vs. 2023)

-0.55 nights (vs. 2019)



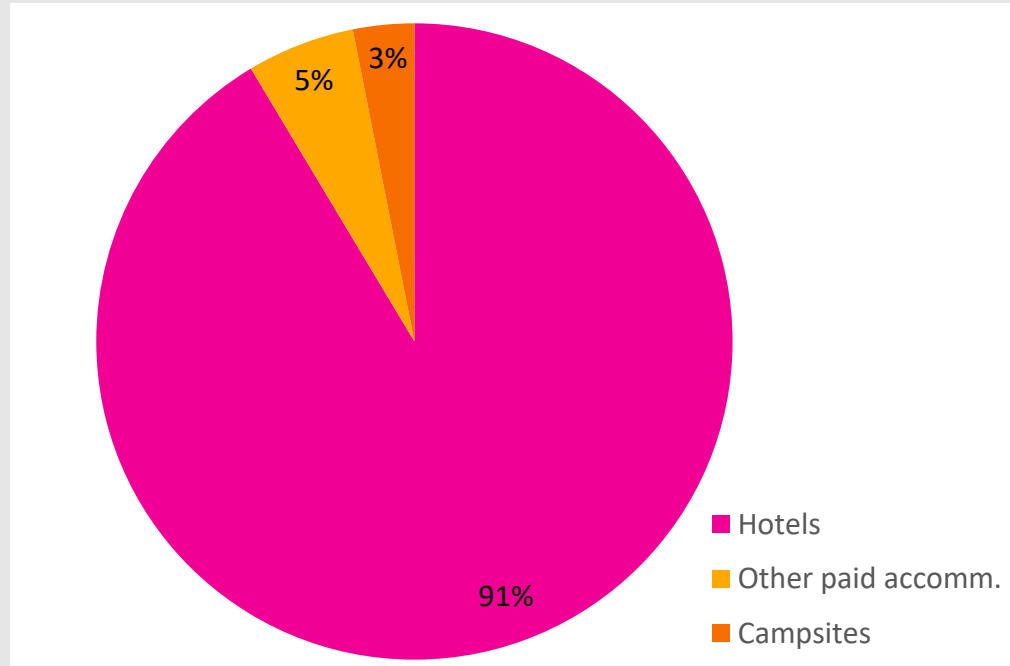


# Nights & arrivals in paid accommodation

Type of accommodation, 2024

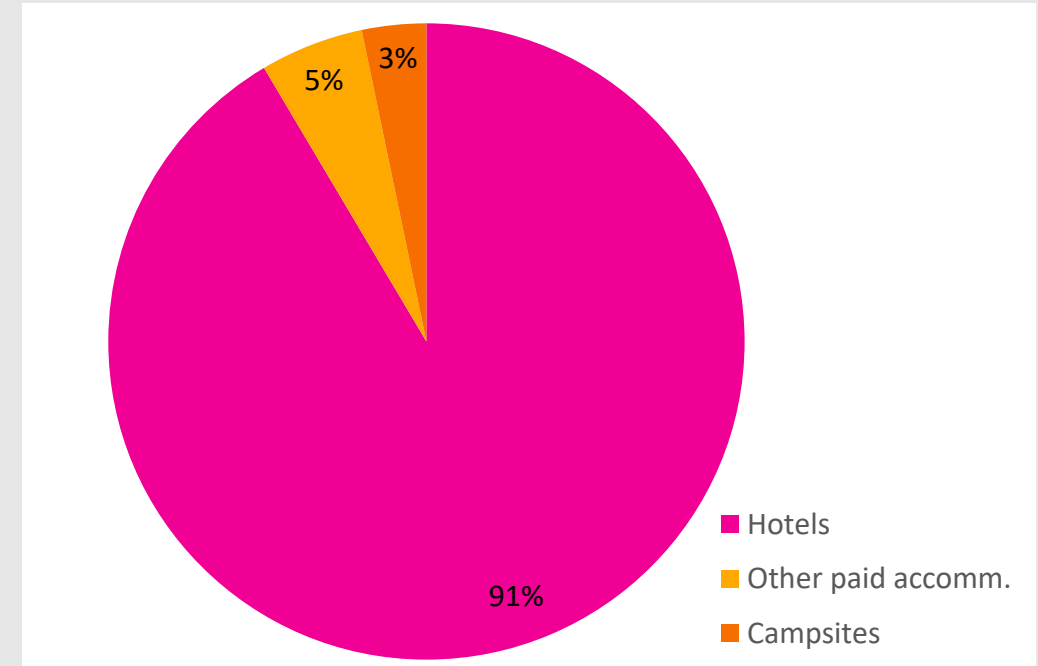


Nights,  
paid accommodation, 2024



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

Arrivals,  
paid accommodation, 2024



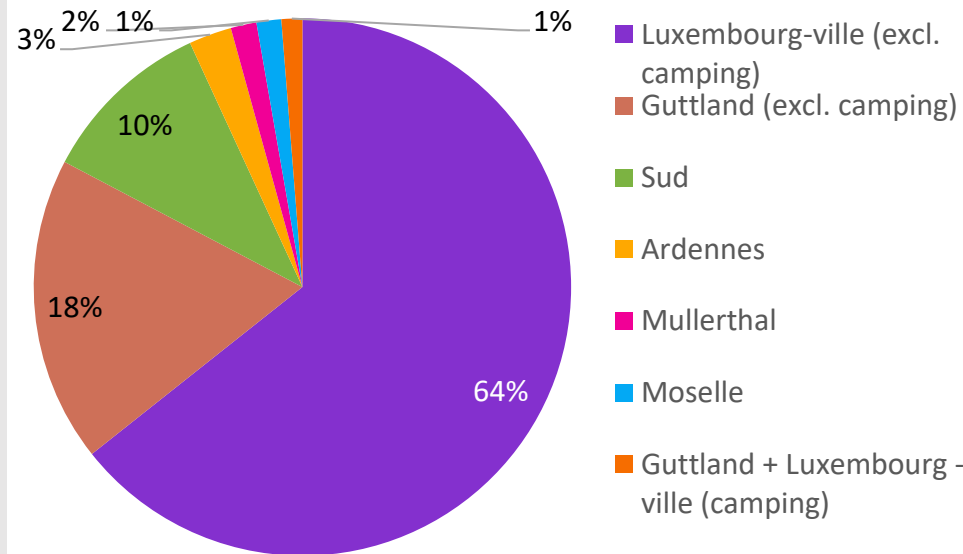
Hotels	25.820	+6% (vs. 2023)	-2% (vs. 2019)
Other paid accommodation	1.486	-1% (vs. 2023)	-33% (vs. 2019)
Campsites	921	+3% (vs. 2023)	-13% (vs. 2019)

# Nights & arrivals in paid accommodation

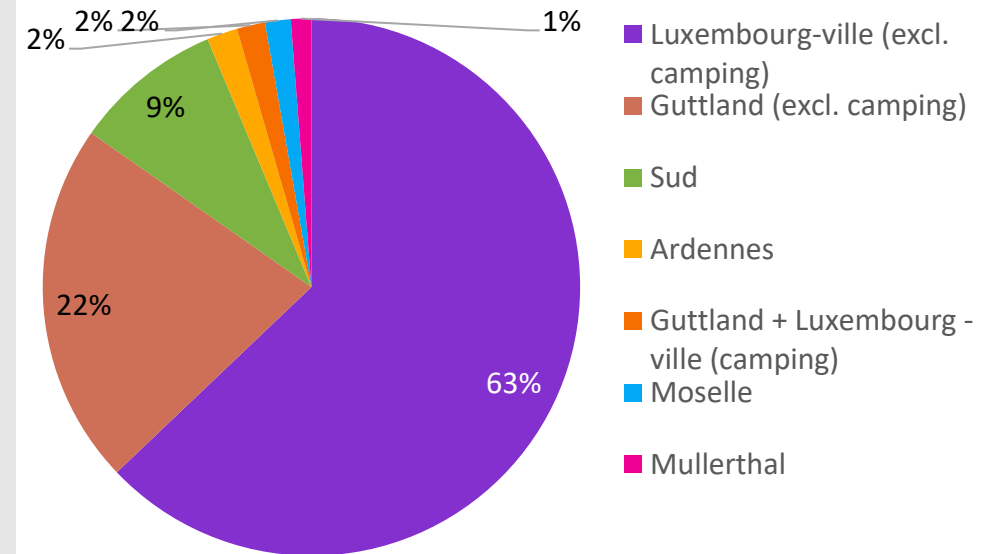
## Regions, 2024



### 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)

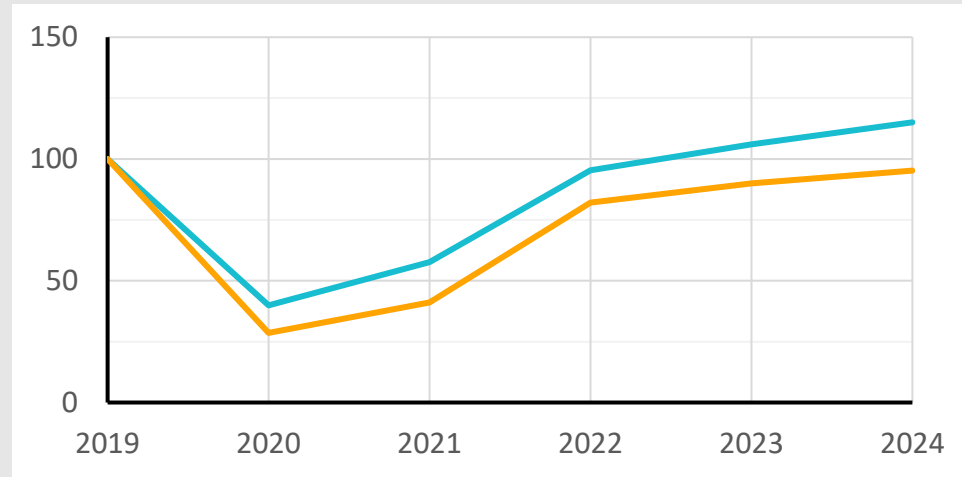
Lux.-City (excl. camping)	17.752	+14% (vs. 2023)	+24% (vs. 2019)
Guttland (excl. camping)	6.162	-2% (vs. 2023)	-20% (vs. 2019)
South	2.530	-17% (vs. 2023)	-51% (vs. 2019)
Eislek	521	-2% (vs. 2023)	-10% (vs. 2019)
Guttland/Lux.-City (camping)	480	-20% (vs. 2023)	-39% (vs. 2019)
Moselle	435	+10% (vs. 2023)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

# Arrivals in paid accommodation

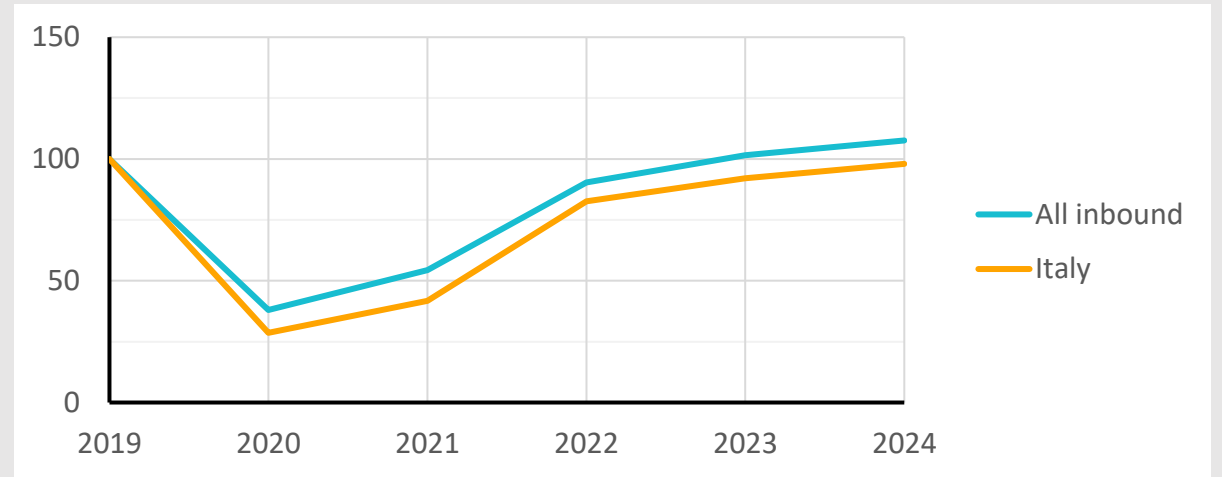
## Trends 2019-2024



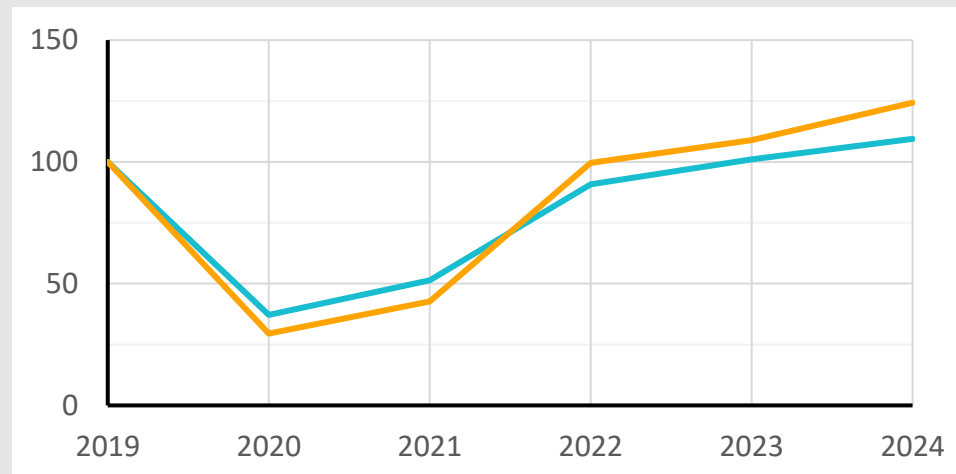
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

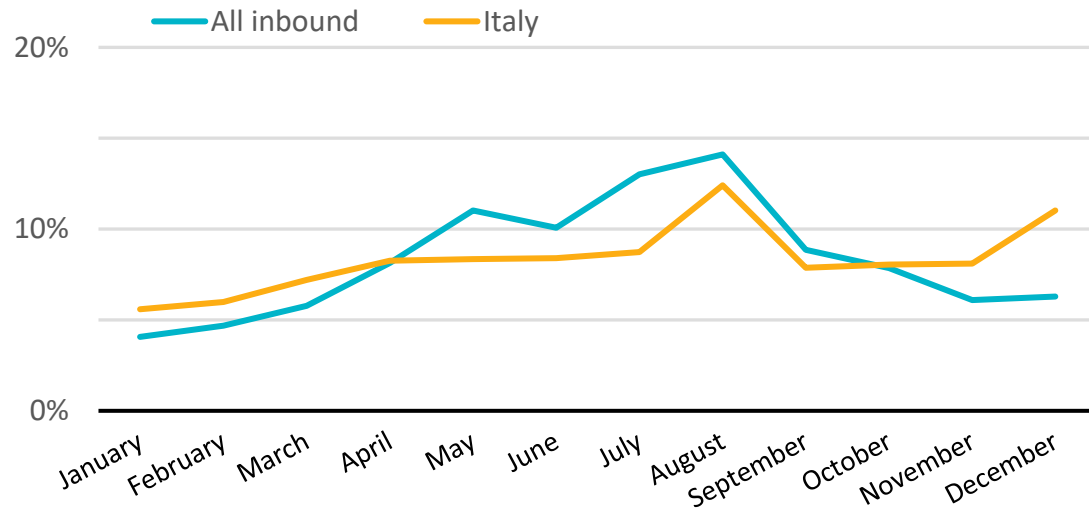


# Arrivals in paid accommodation

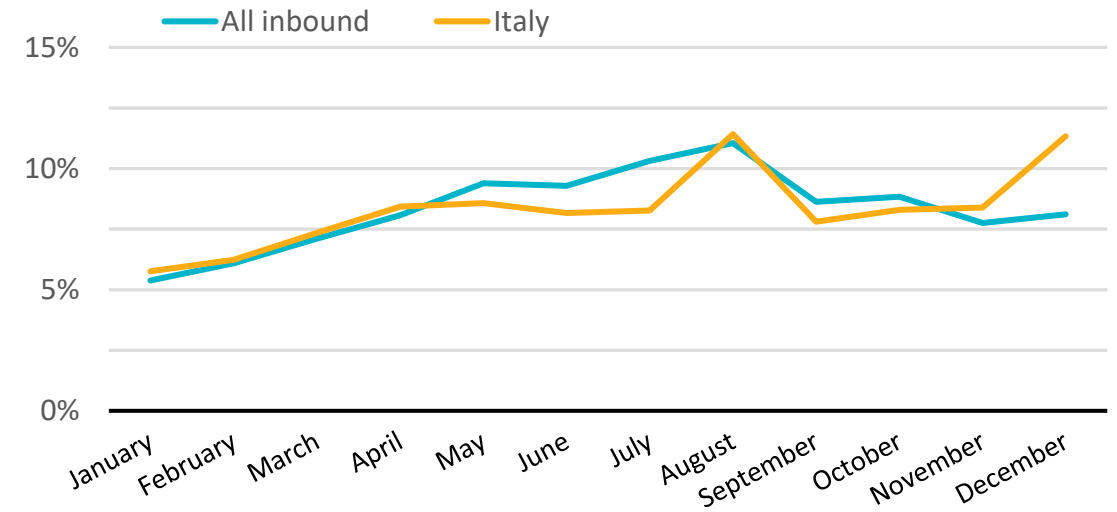
## Seasonality



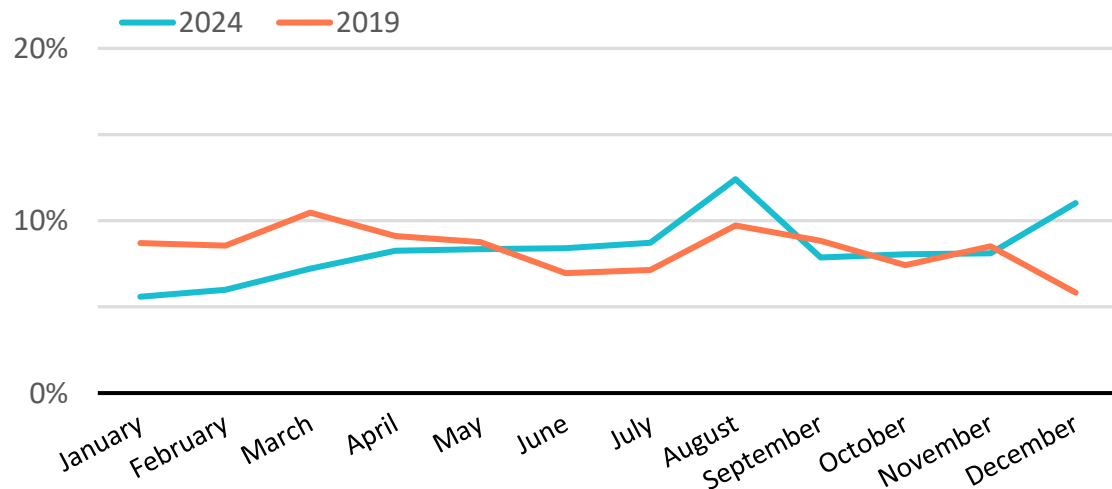
### All paid accommodation, 2024



### Hotels, 2024



### All paid accommodation, arrivals from Italy



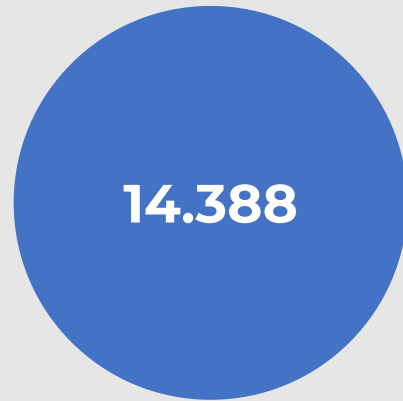


# Short-term rentals

## 2024 and 2018-2024



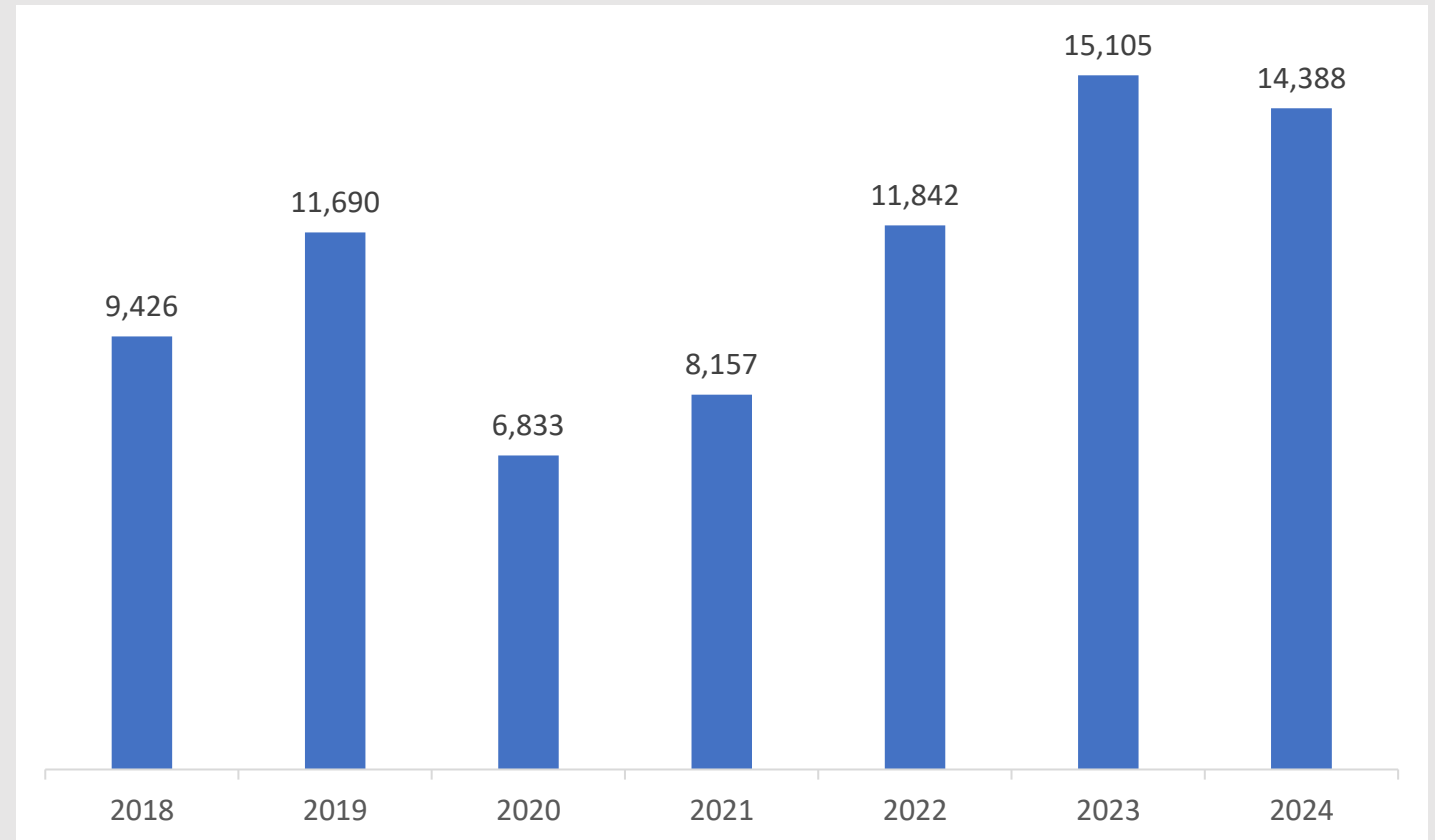
Nights,  
Short-term rentals, 2024



-5% (vs. 2023)

23% (vs. 2019)

Nights,  
Short-term rentals, 2018-2024





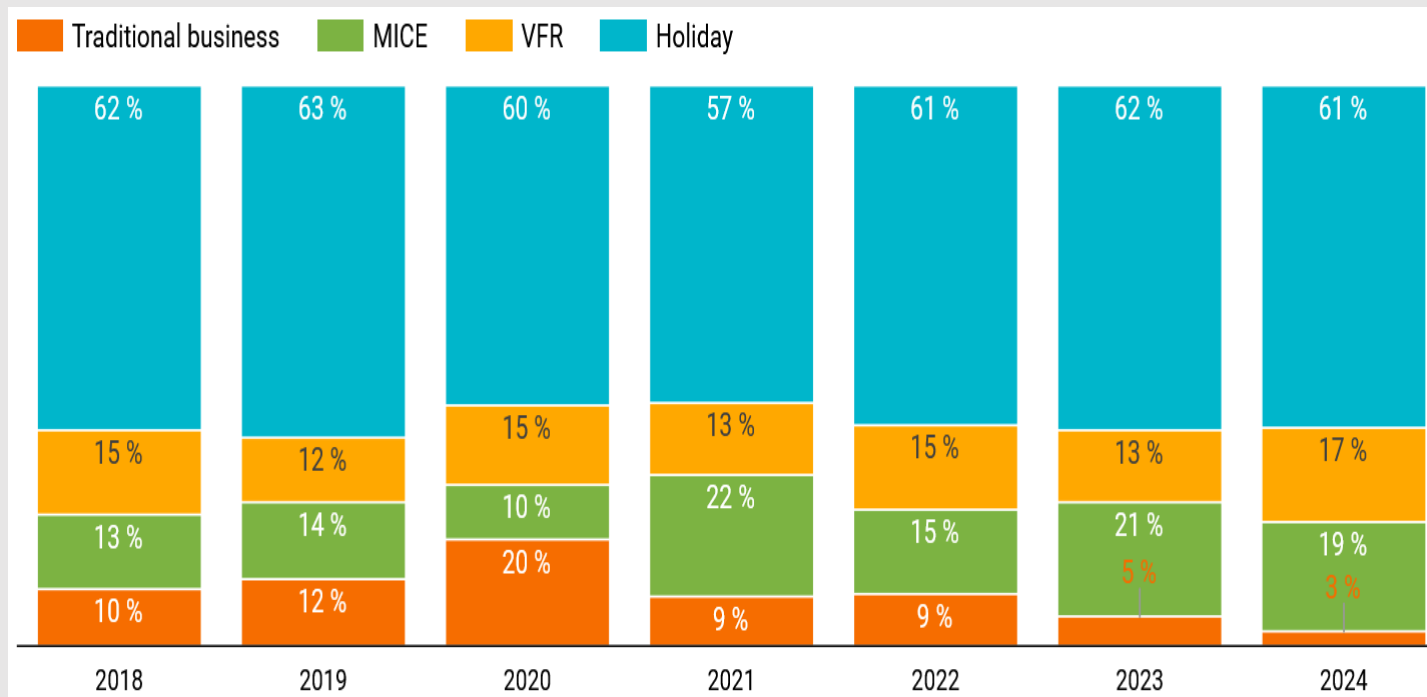
# **Characteristics of inbound trips**

# Italian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2018-2024

Italian trips to Luxembourg, 2018-2024



2024

Italy to

Europe to

Luxembourg

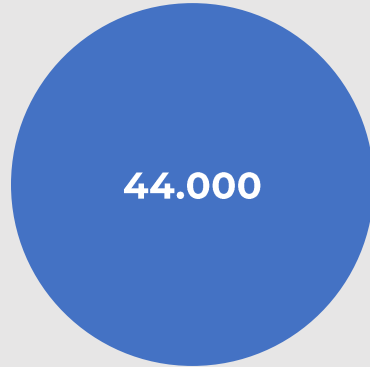
Holiday	61%	61%
VFR	17%	15%
MICE	19%	15%
Traditional Business	3%	8%

# Inbound same-day trips to Luxembourg

## 2024



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



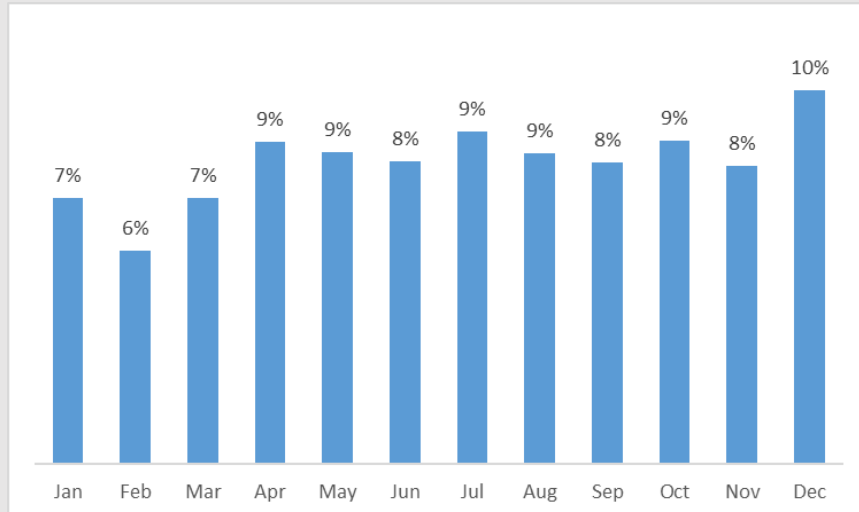
+/-0% (vs. 2023)

Average length  
of same-day trips



+0,3 h (vs. 2023)

Seasonality  
% of same-day trips





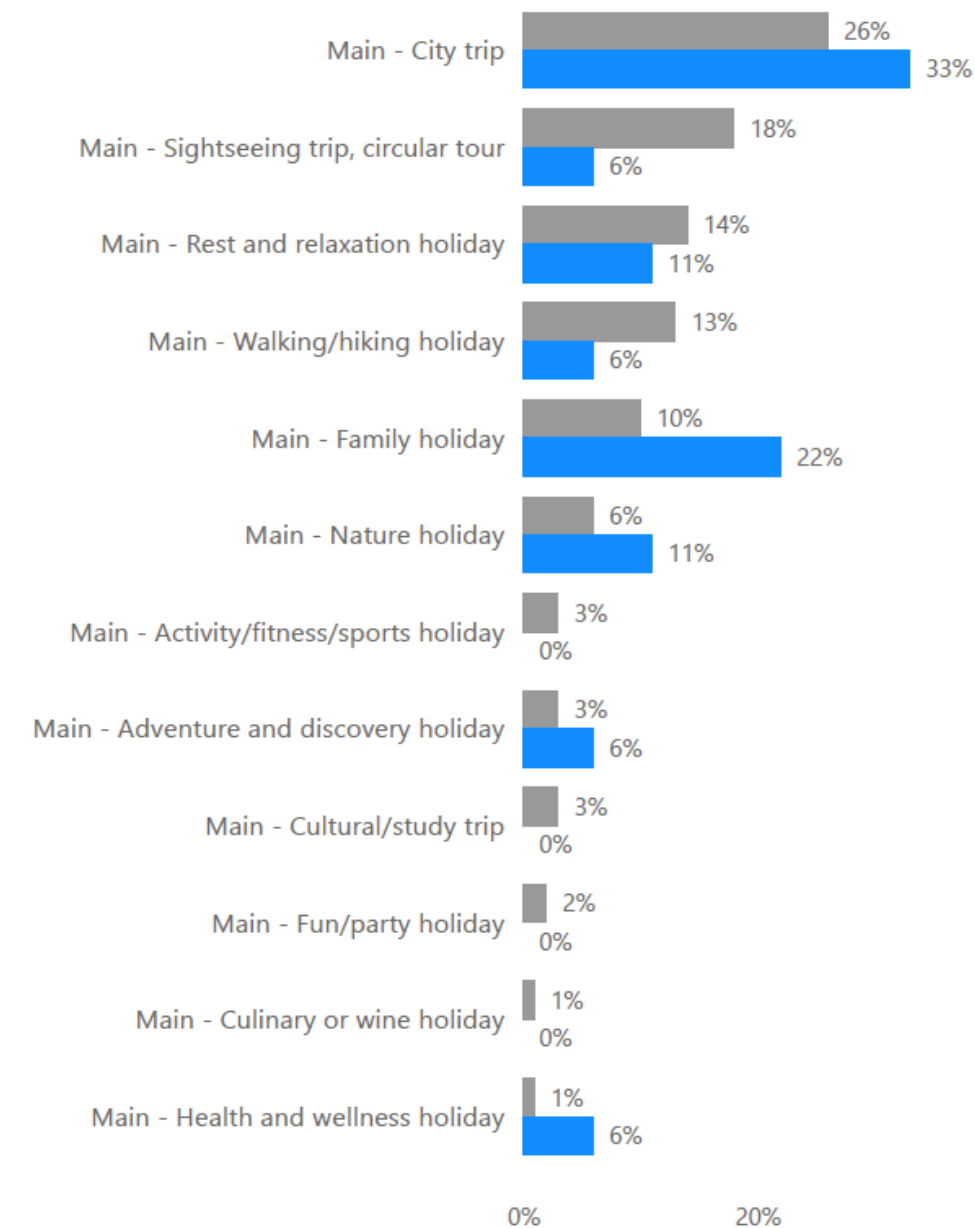


# **Travel behaviour of inbound leisure visitors**

## Main holiday types

### Visitors with overnight

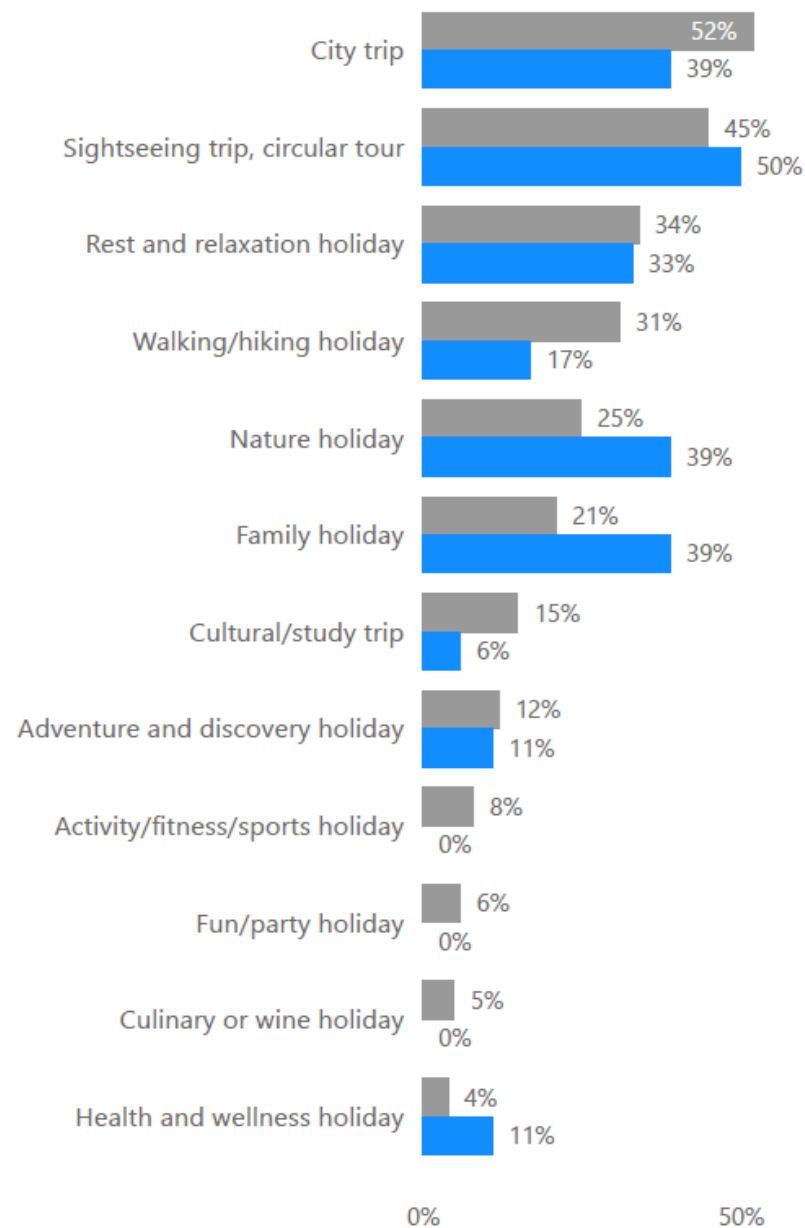
● All Inbound ● Italy



## All holiday types

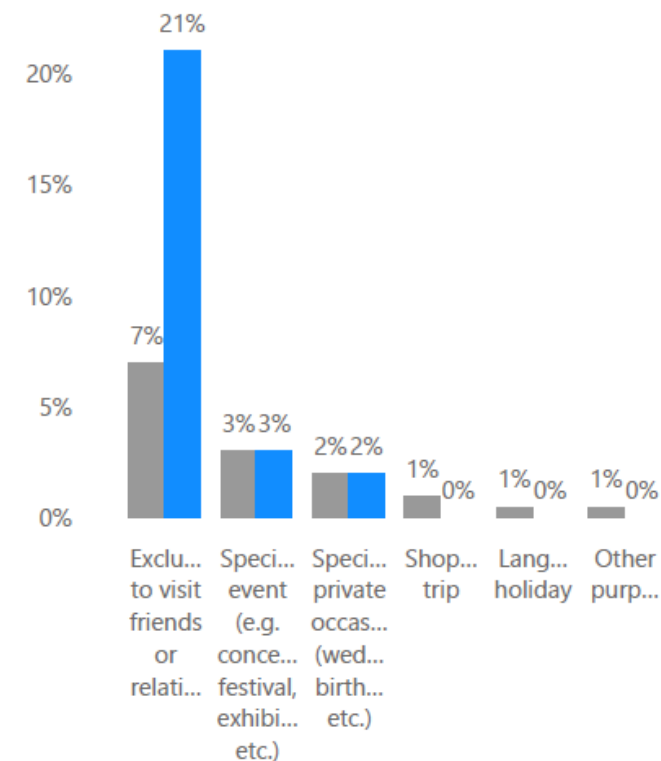
### Visitors with overnight

● All Inbound ● Italy



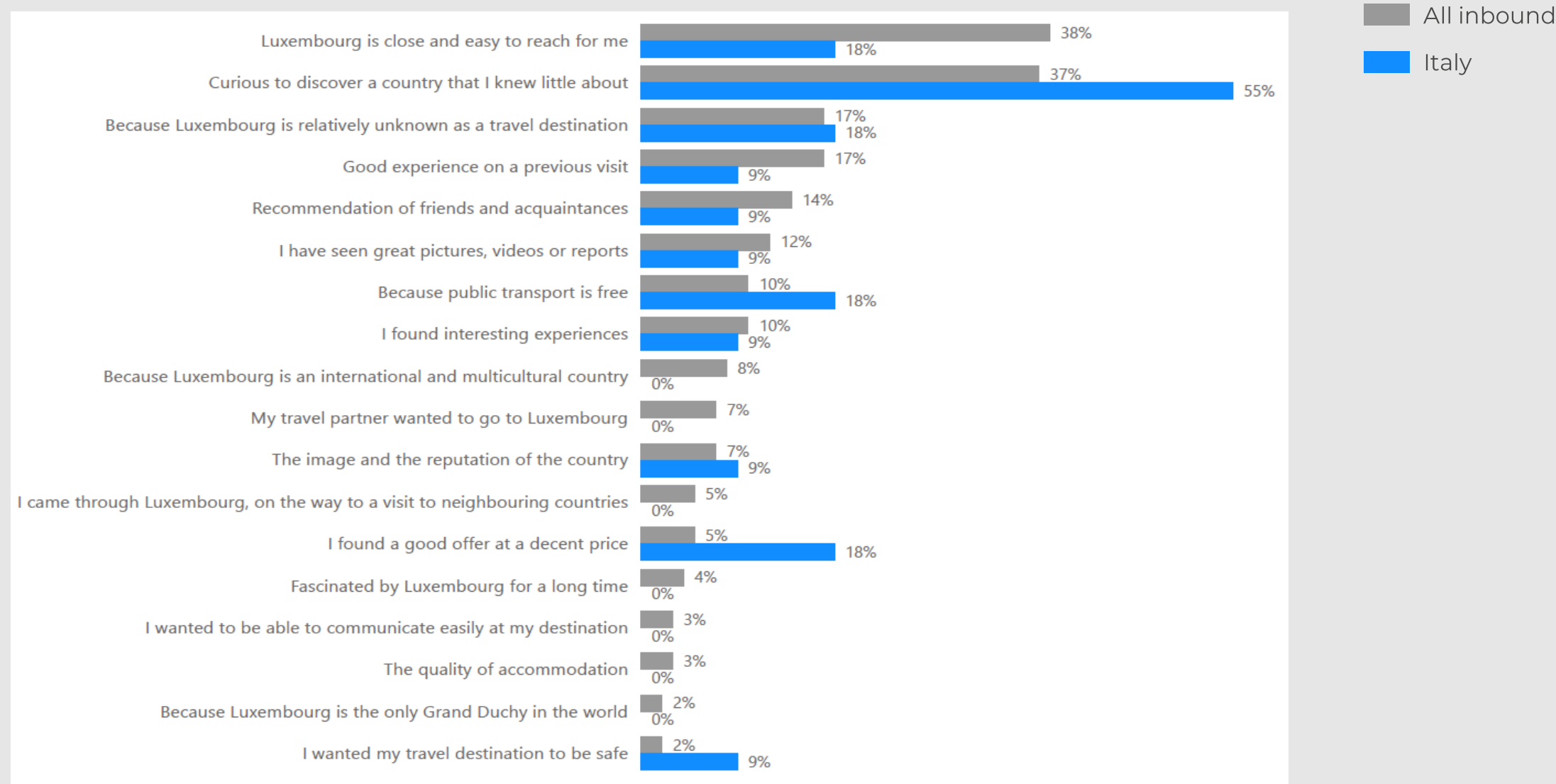
## Main purpose of overnight trip (if not holiday)

● All Inbound ● Italy



# Key decision criteria for choosing Luxembourg

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



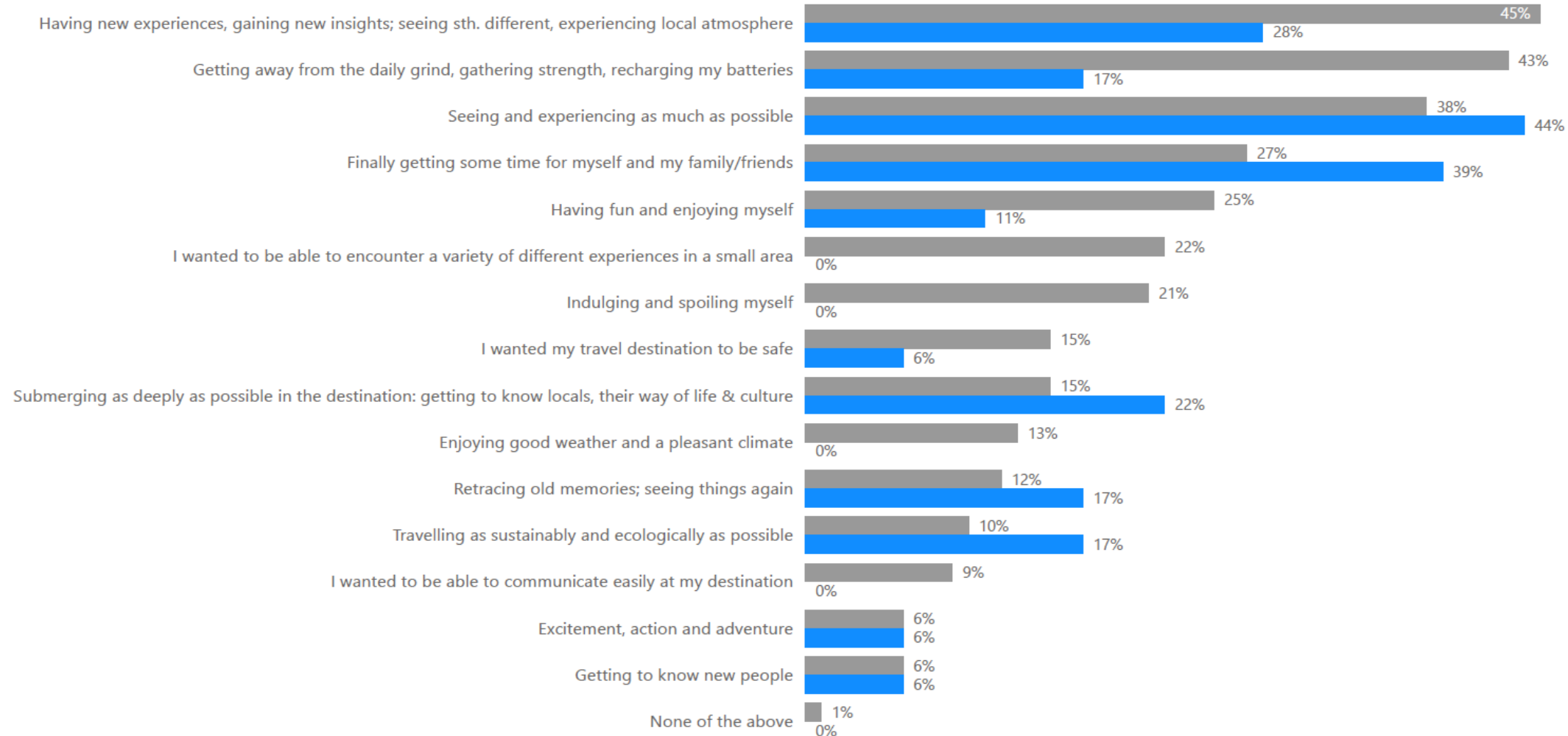
Source: LFT/Ilres Visitor Survey.  
(\*) Maximum 3 answers possible.

# Key travel motives

## Inbound leisure visitors with overnight, 2023-2024



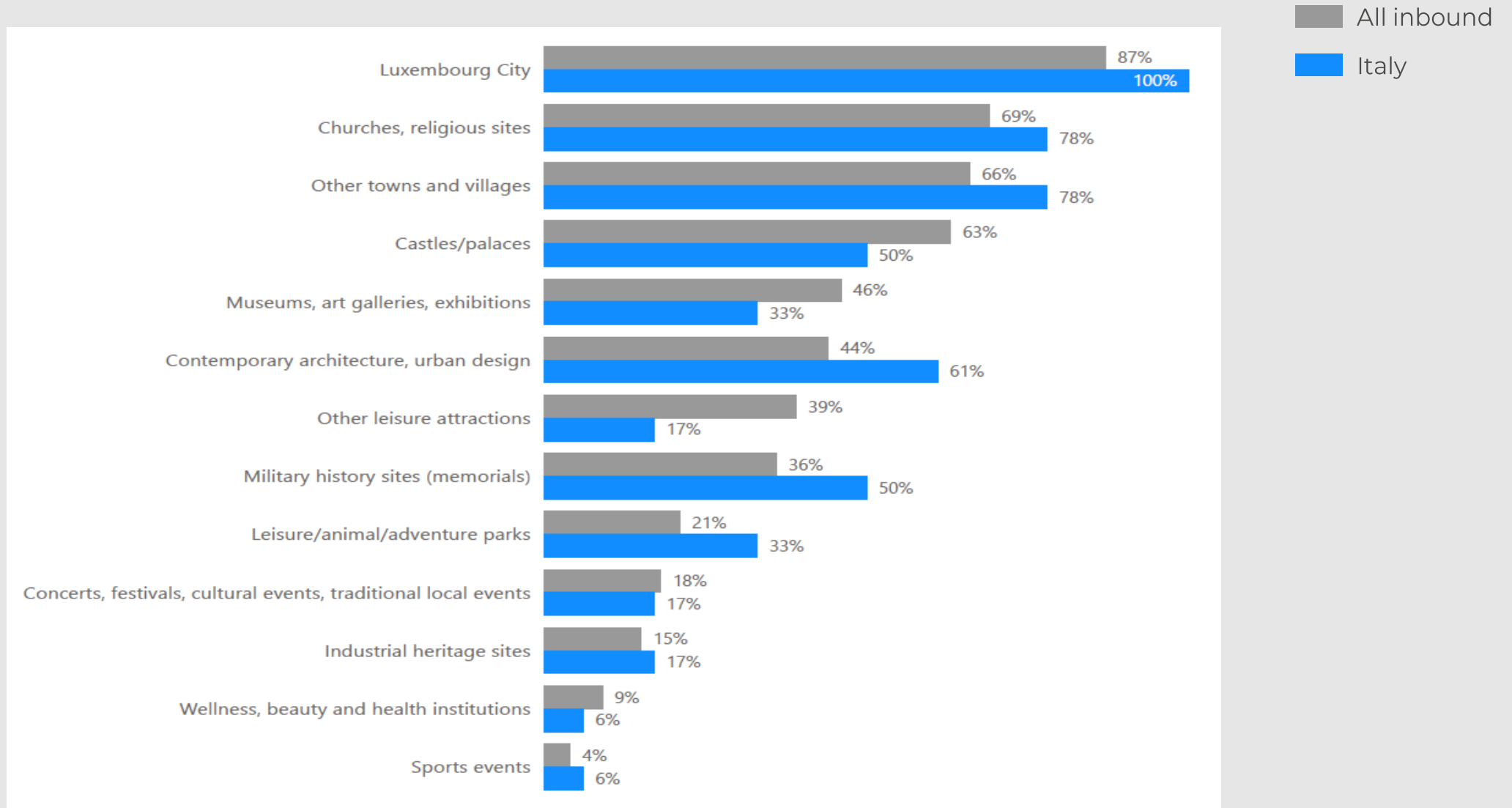
■ All inbound  
■ Italy





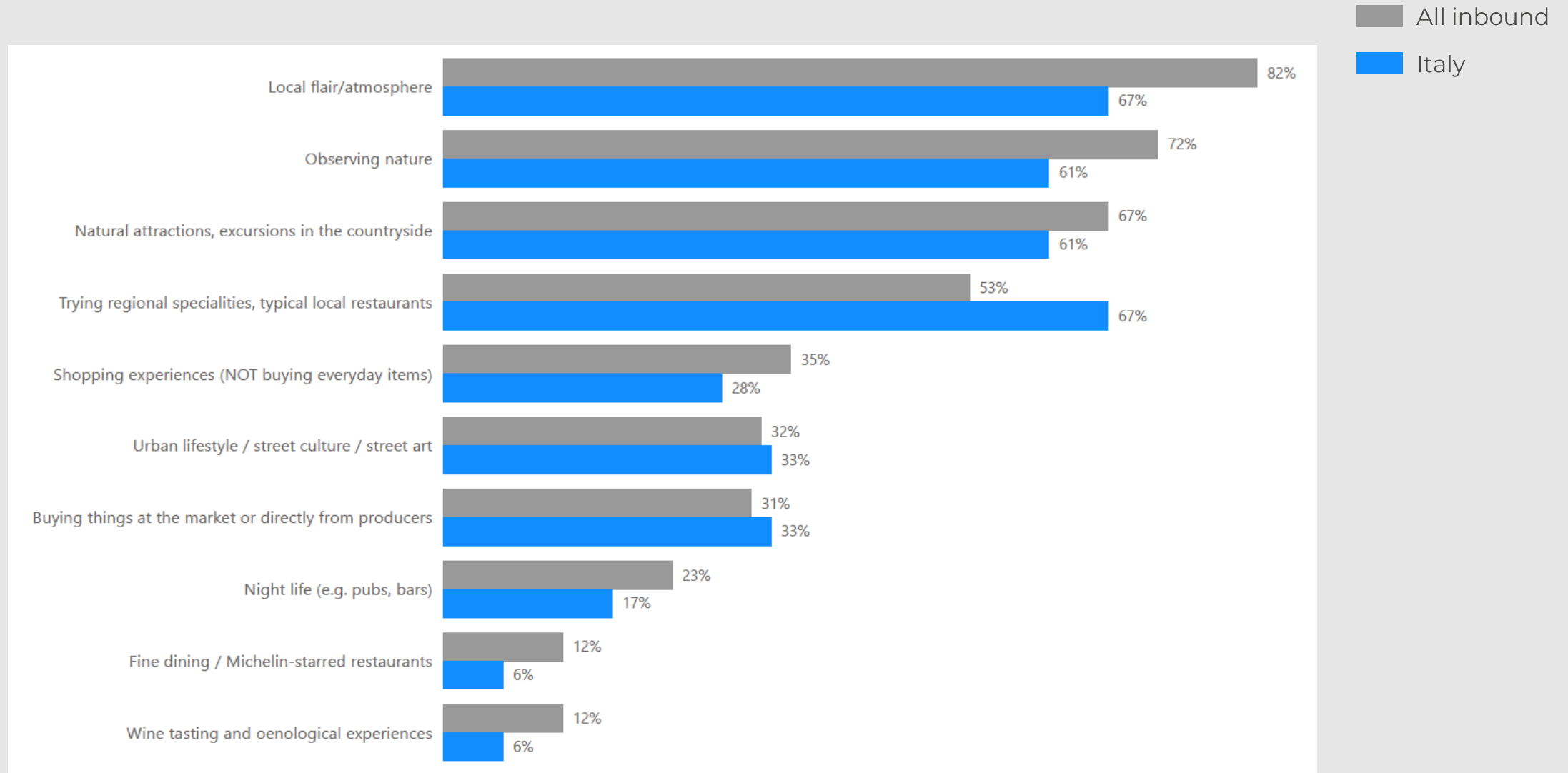
# Type of places visited in Luxembourg

## Inbound leisure visitors with overnight, 2023-2024



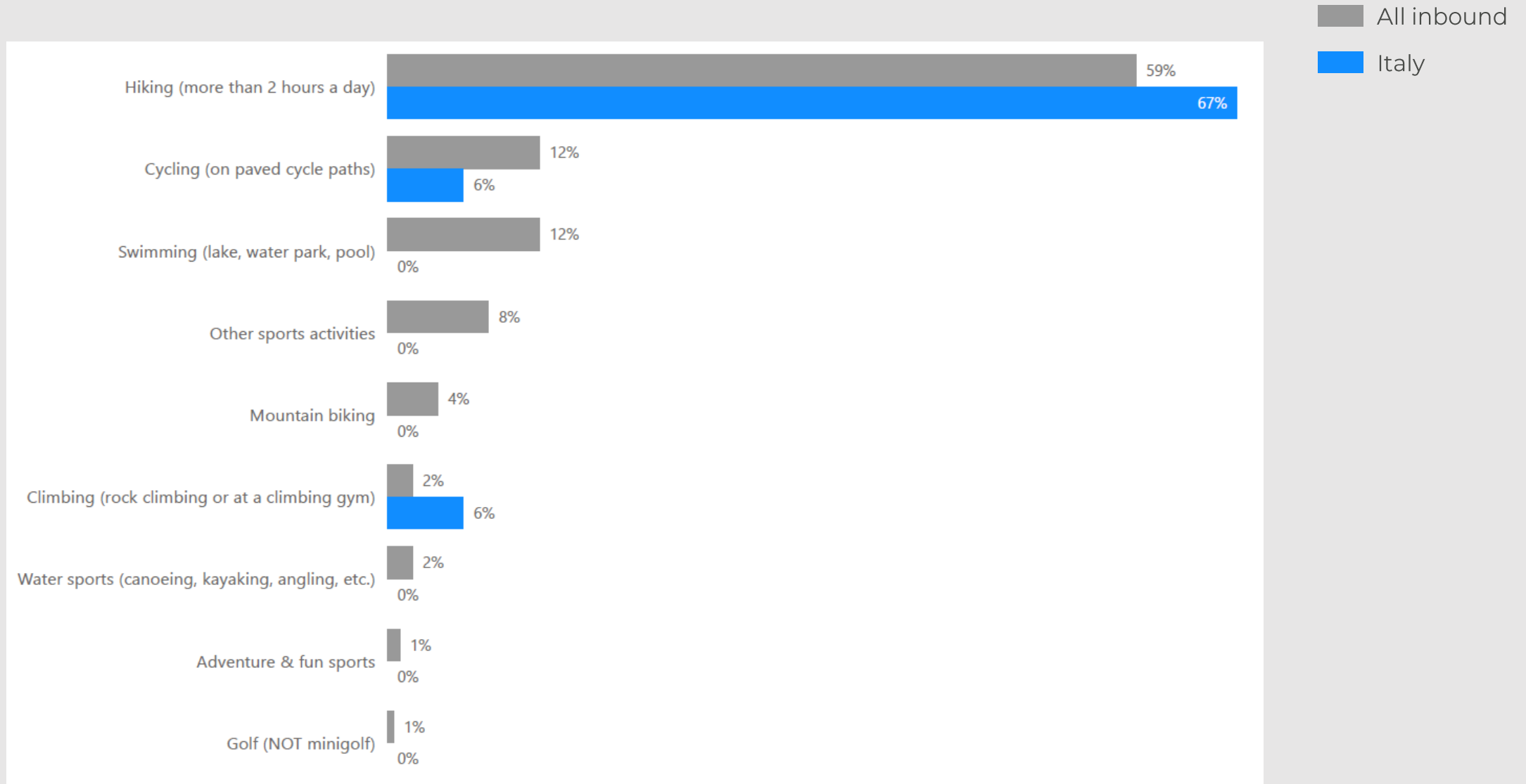
# Non-sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



# Sporting activities undertaken in Luxembourg

## Inbound leisure visitors with overnight, 2023-2024



# Age groups

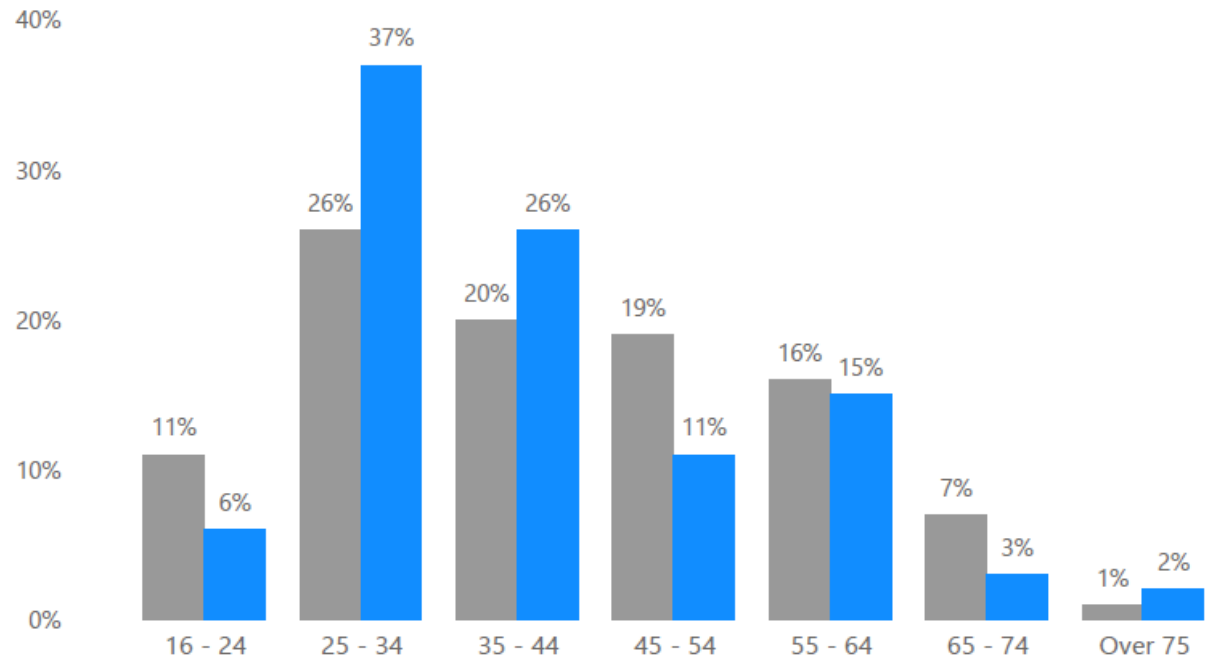
## Inbound leisure visitors with overnight, 2023-2024



■ All inbound  
■ Italy

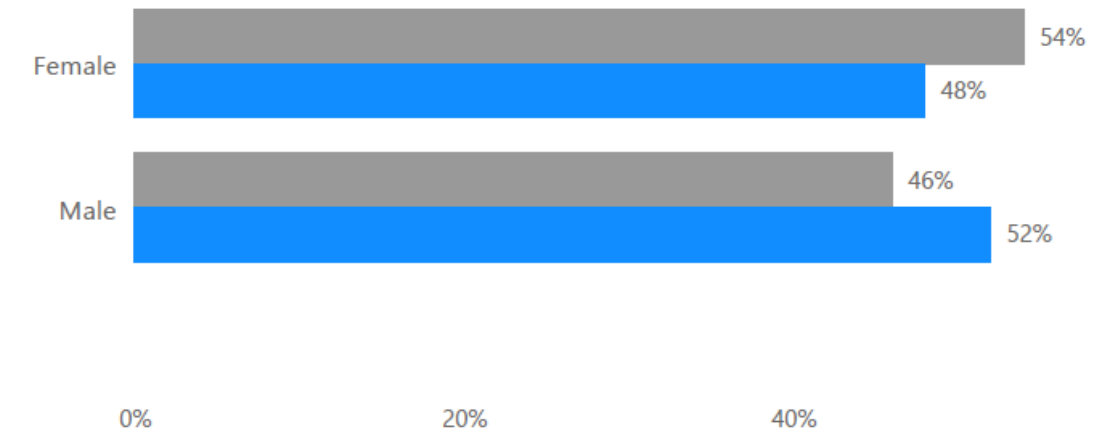
### Age

Visitors with overnight



### Gender

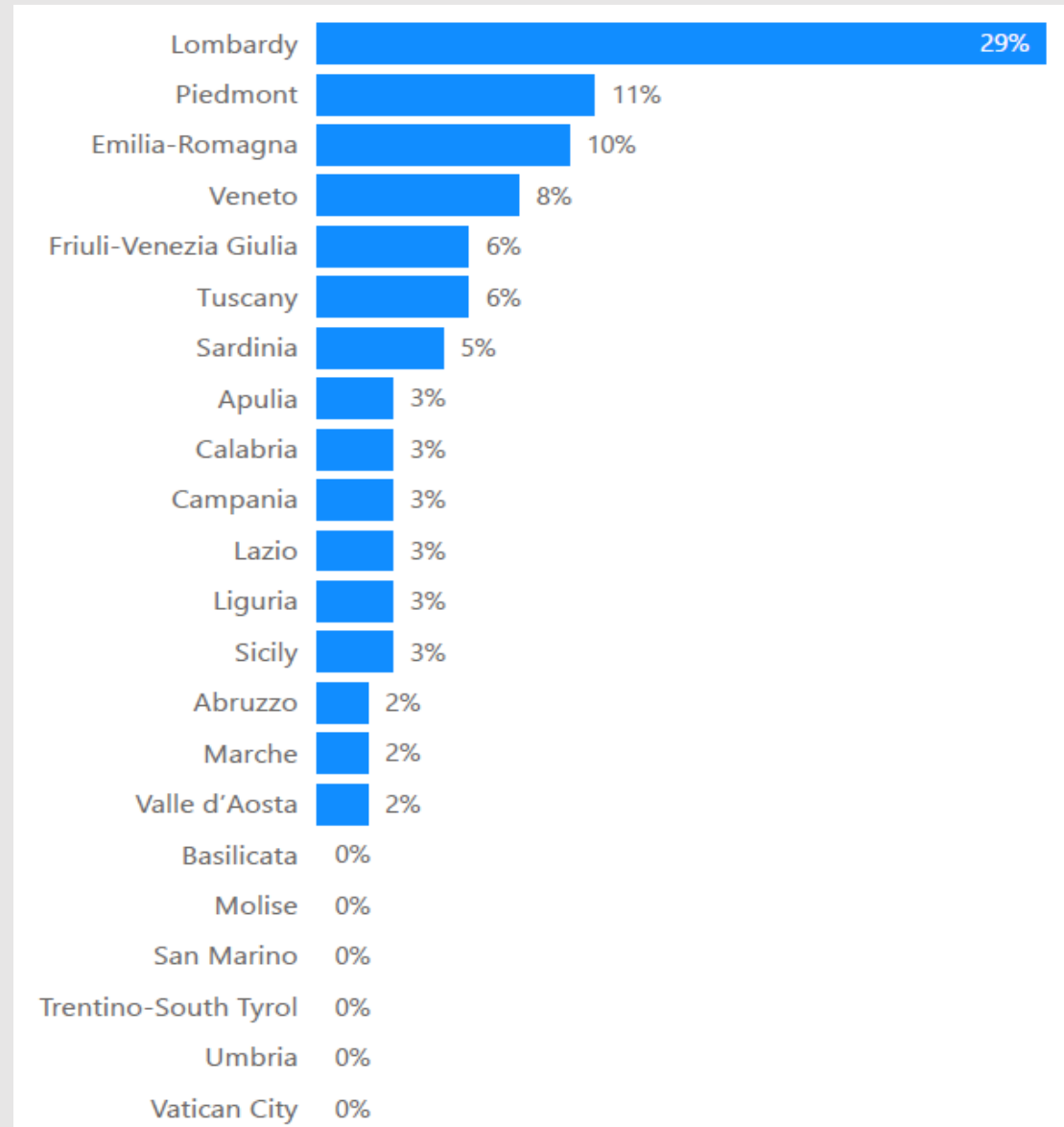
Visitors with overnight





# Region of origin

Inbound leisure visitors with overnight, 2023-2024

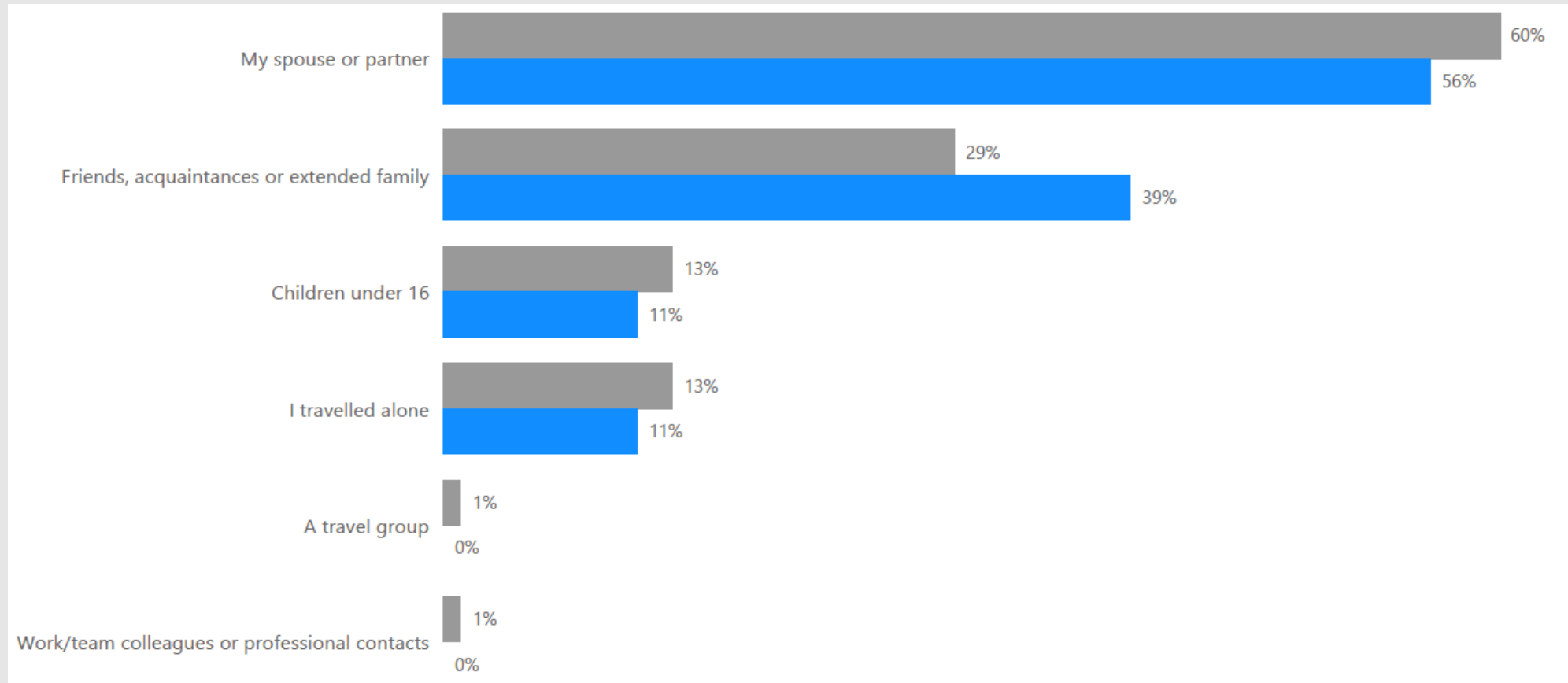


# Travel party

## Inbound leisure visitors with overnight, 2023-2024



■ All inbound  
■ Italy



# Transport, new visitors and cross-border trips

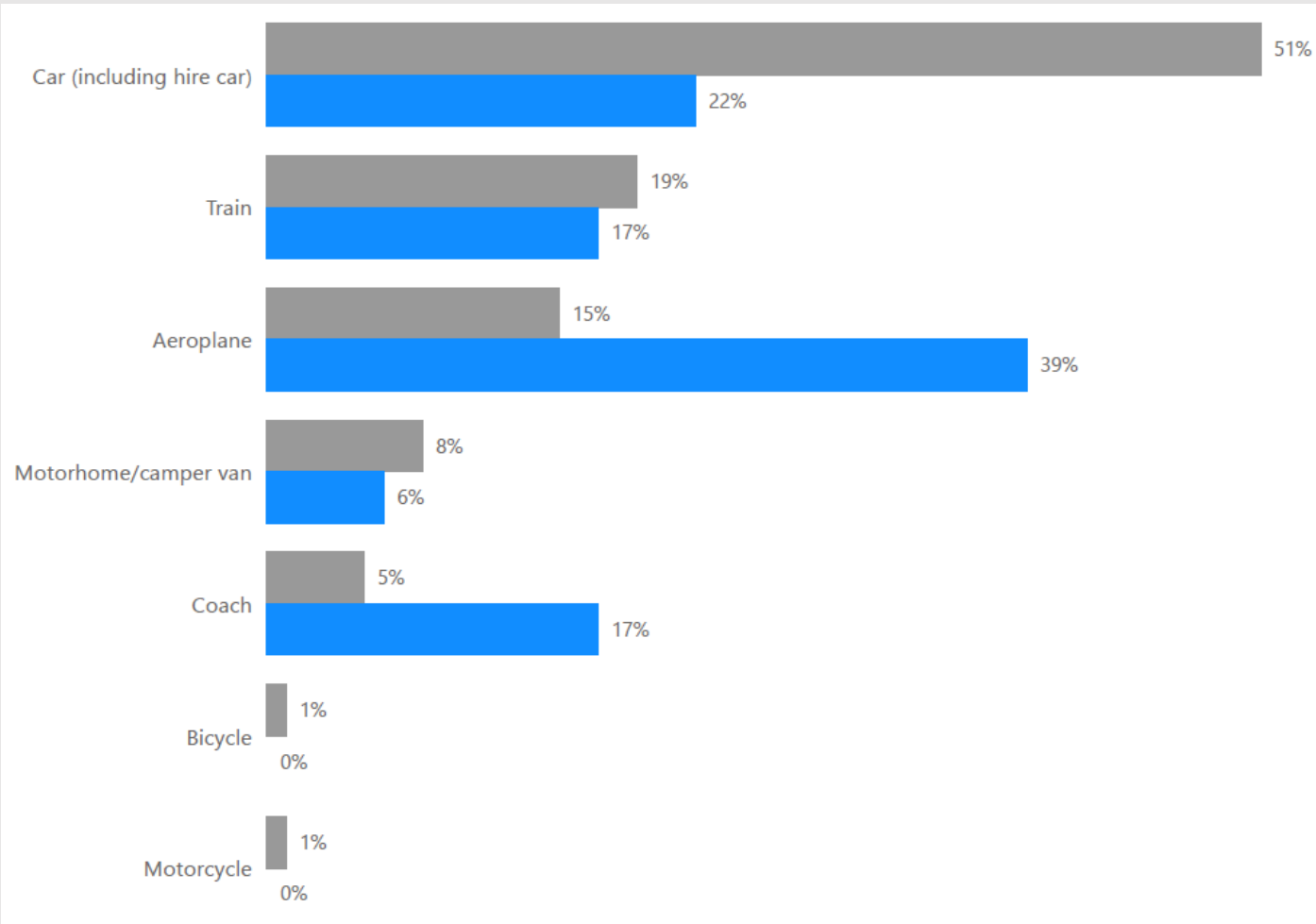
Inbound leisure visitors with overnight, 2023-2024



■ All inbound

■ Italy

## Mode of transport to access Luxembourg



### 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

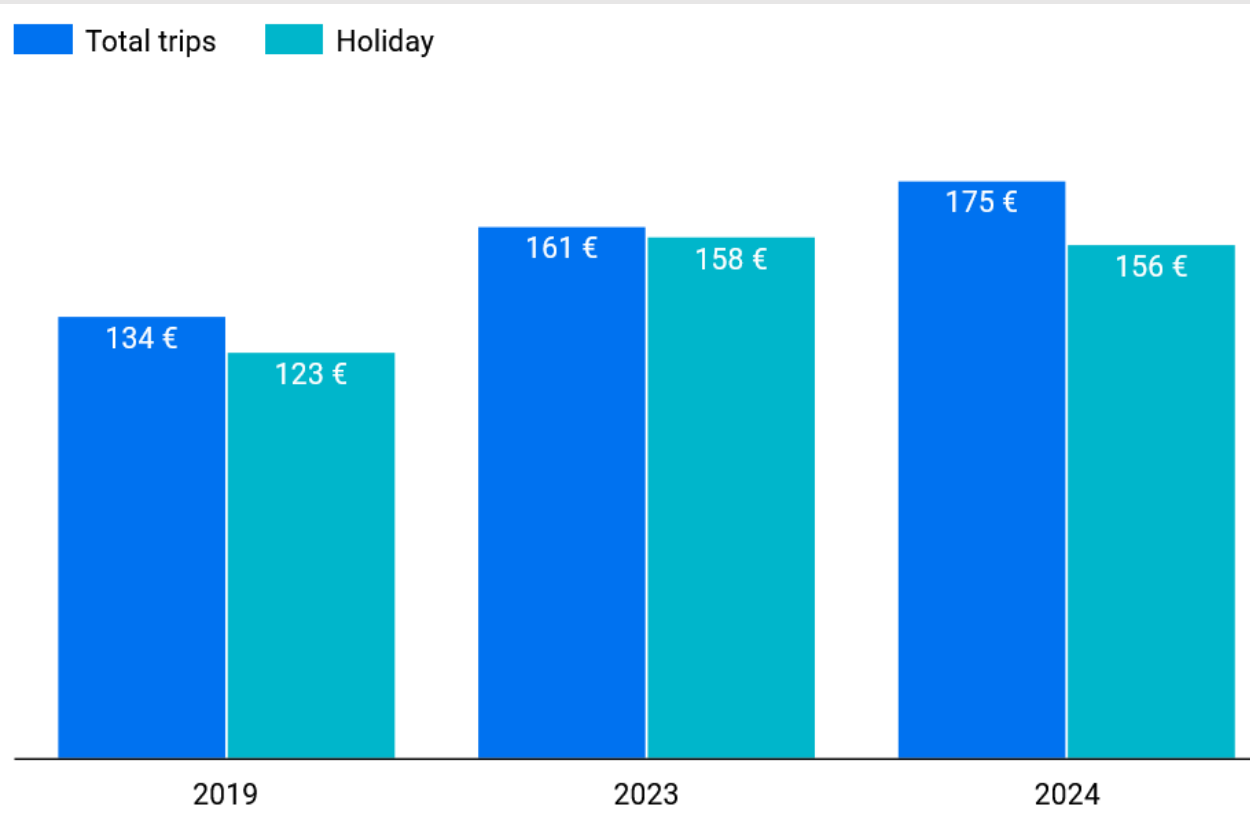
Inbound trips to Luxembourg with overnight (all accommodation)



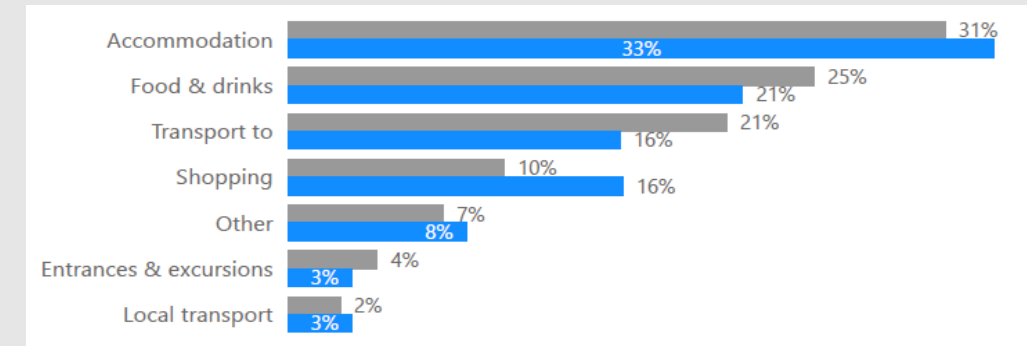
■ All inbound

■ Italy

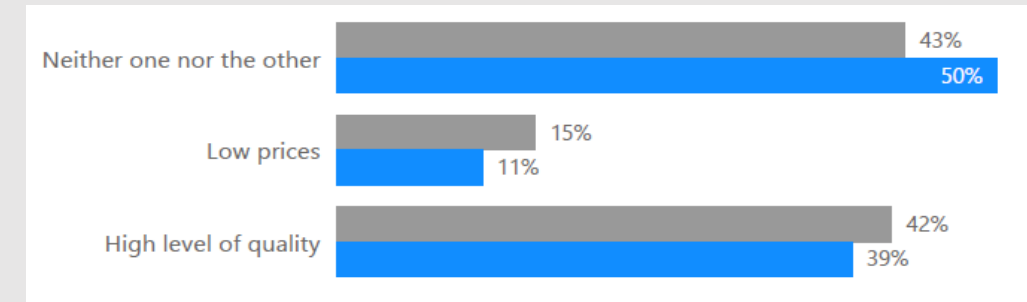
## Average expenditure/pers./day



## Expenditure of leisure inbound visitors by categories, 2023-2024

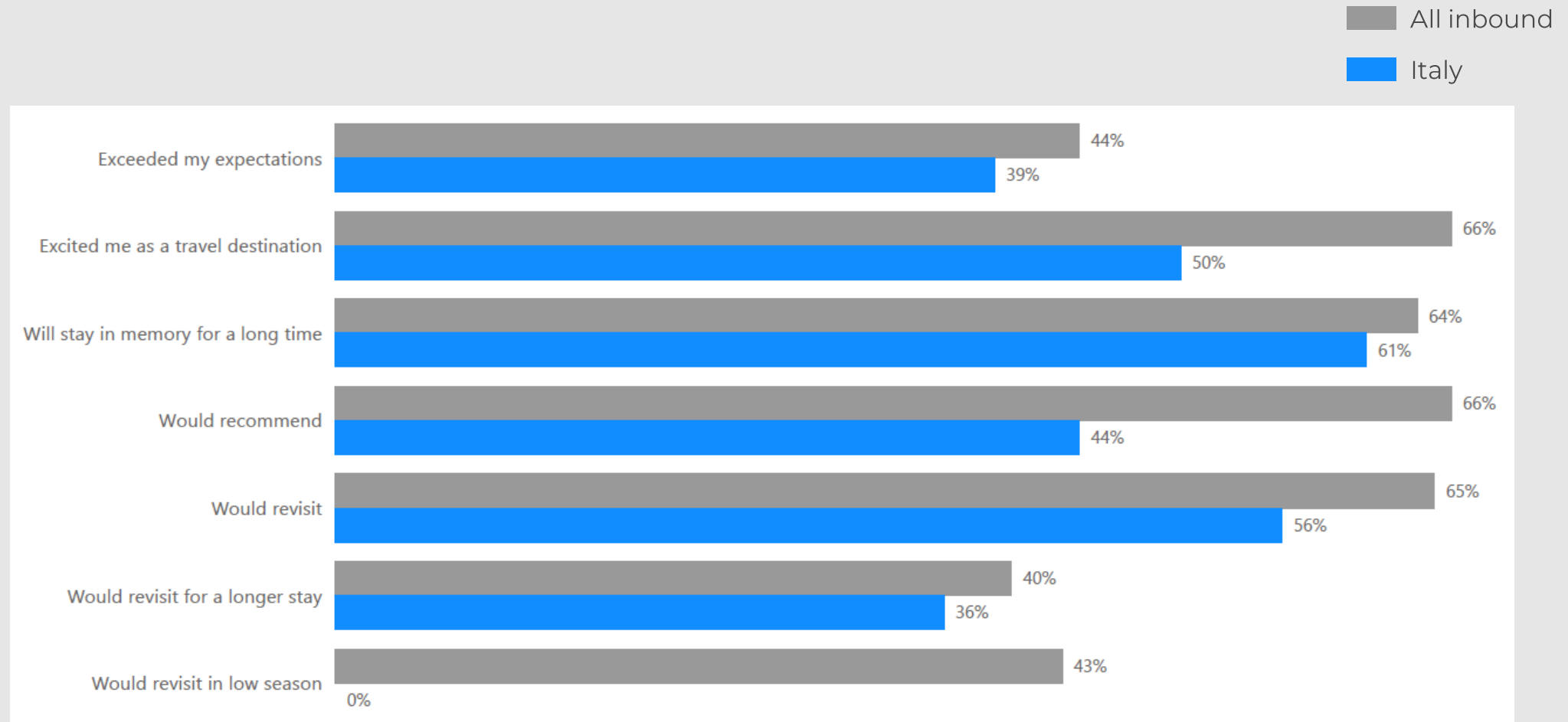


## Quality vs. price-orientation of leisure inbound visitors, 2023-2024



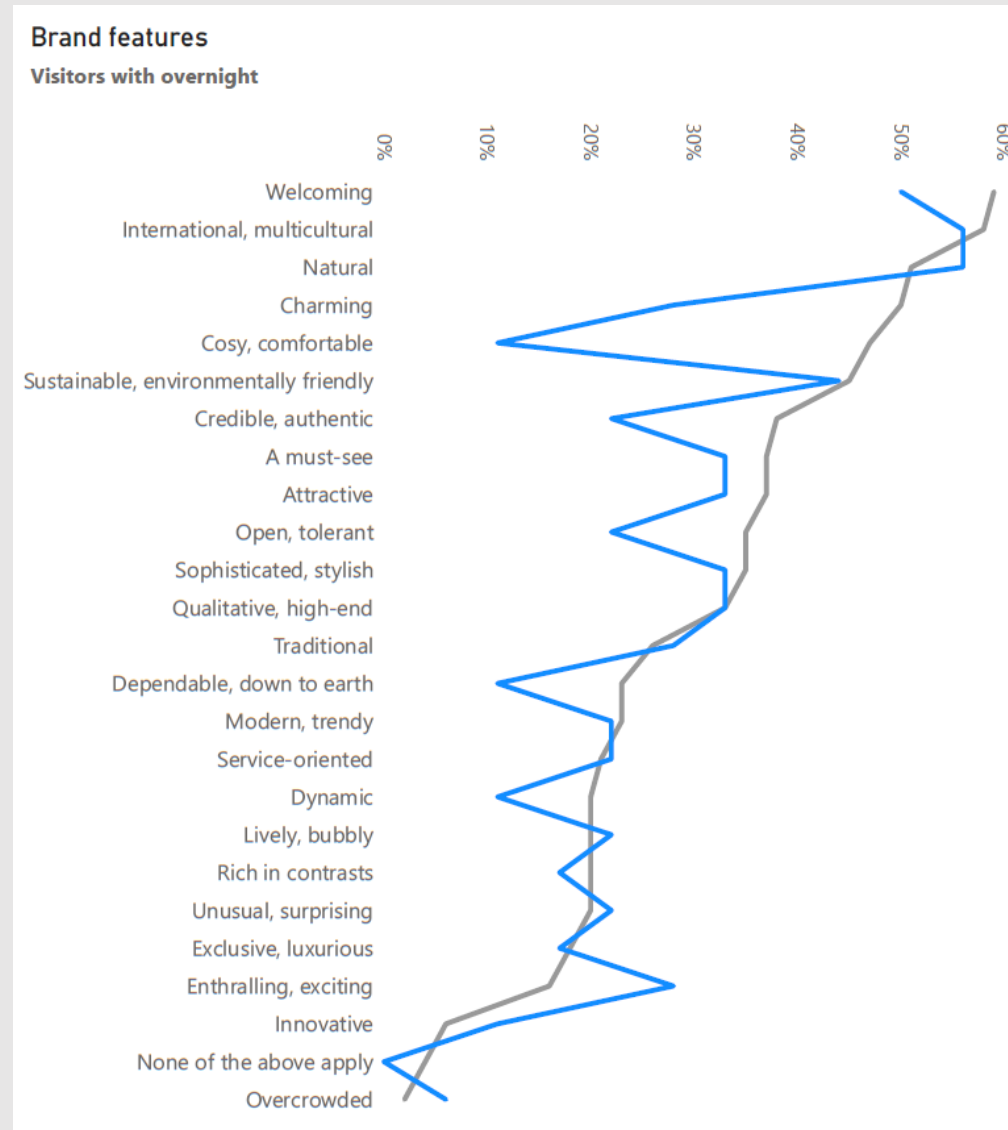
# Visitor satisfaction and recommendation

Inbound leisure visitors, 2023-2024



# Brand features perception

Inbound leisure visitors with overnights, 2023-2024



All inbound  
Italy

# LFT Target Segments



Italy  
All inbound

Explorers



Nature-Loving Actives



Relaxation Seekers



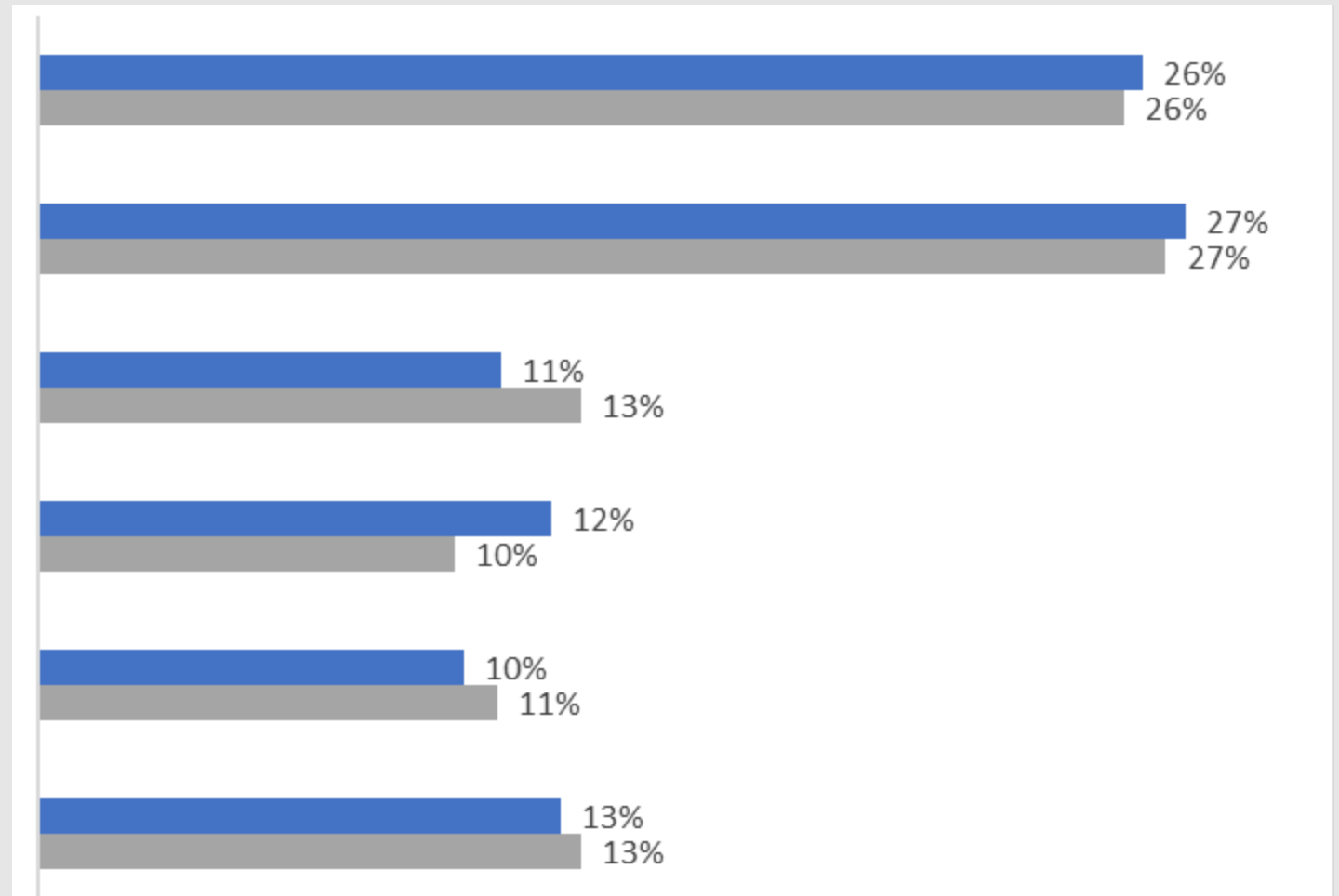
Short Breakers



Perfection Seekers



Leisure Oriented



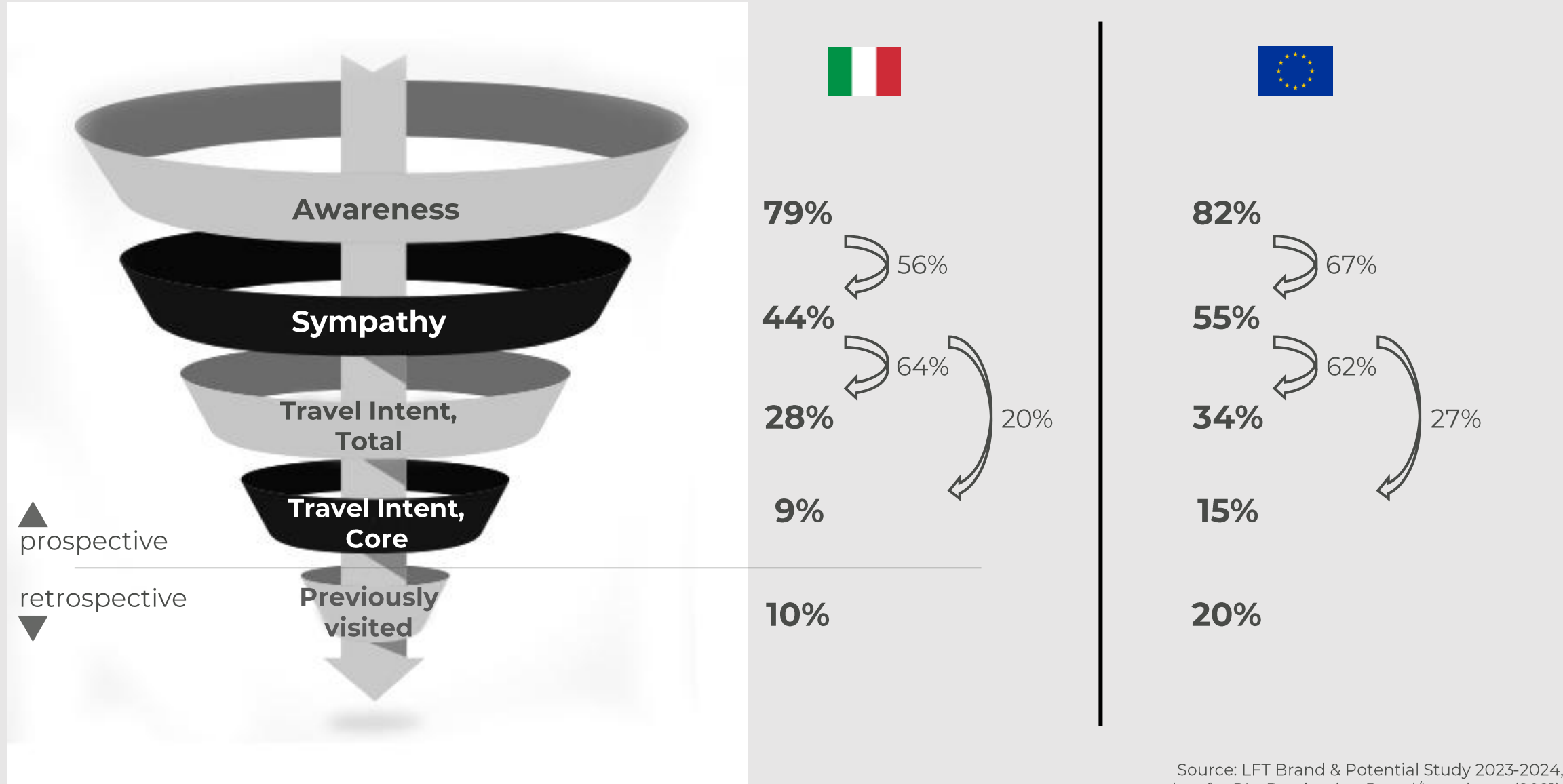


# **Target segments, Brand & Growth Potential**



# Destination Luxembourg - Brand Funnel 2024

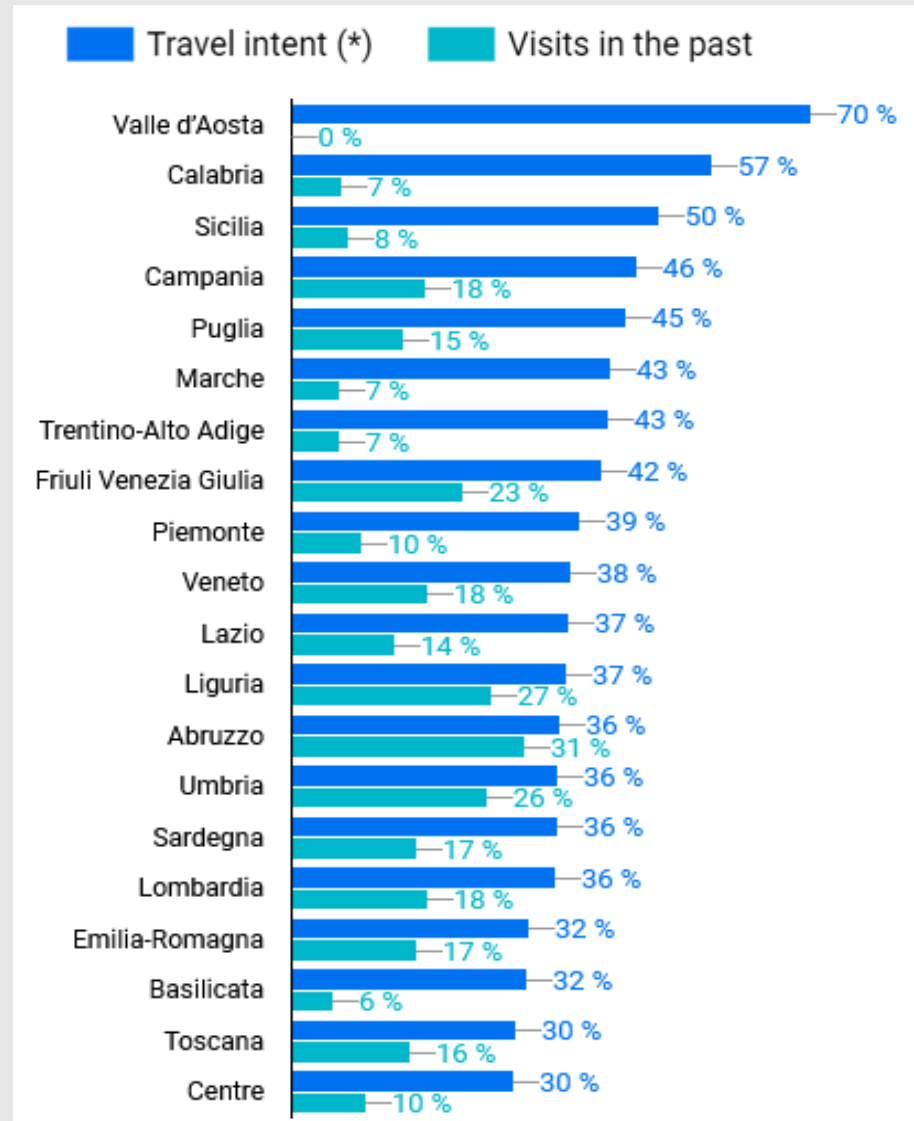
Assessing Luxembourg's **brand strength** as a destination



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

# Regional origin 2024

## Past visitors and future potential



# 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.

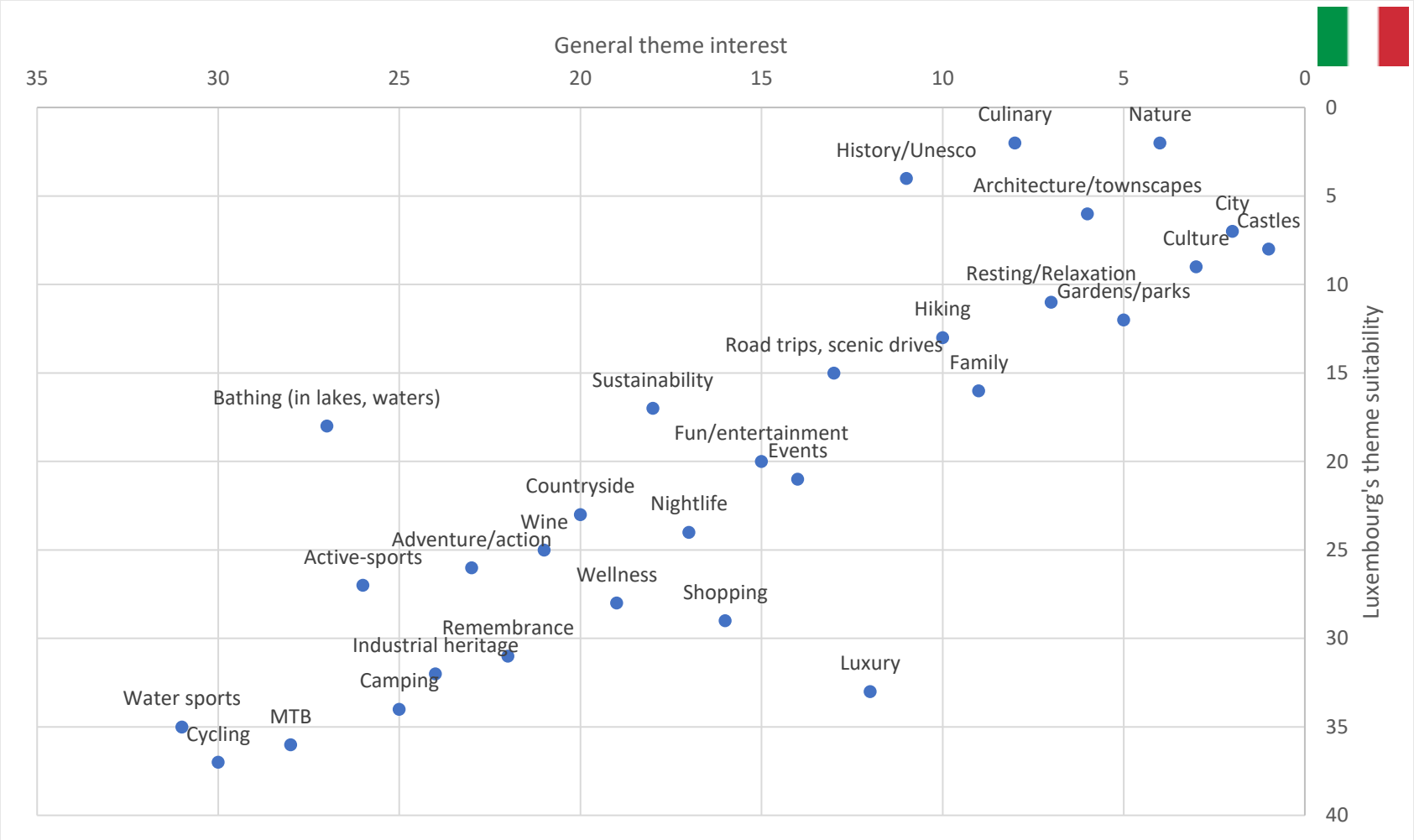
(\*\*) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters)

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



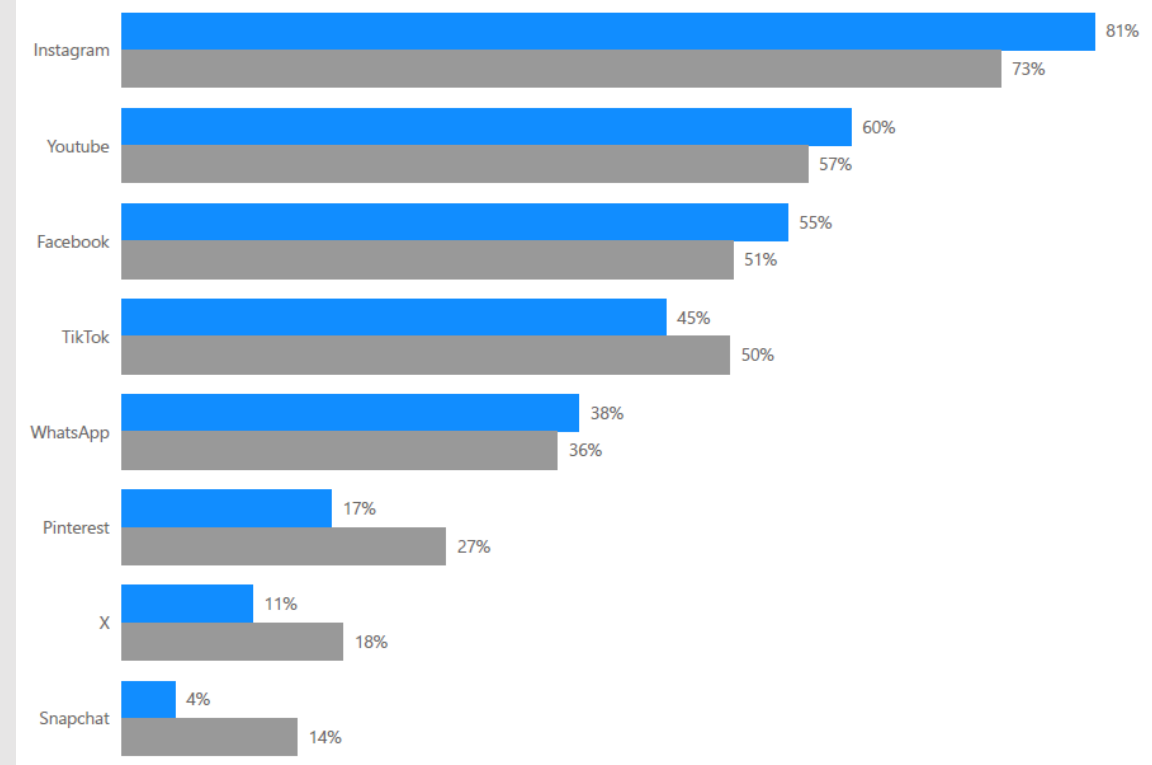
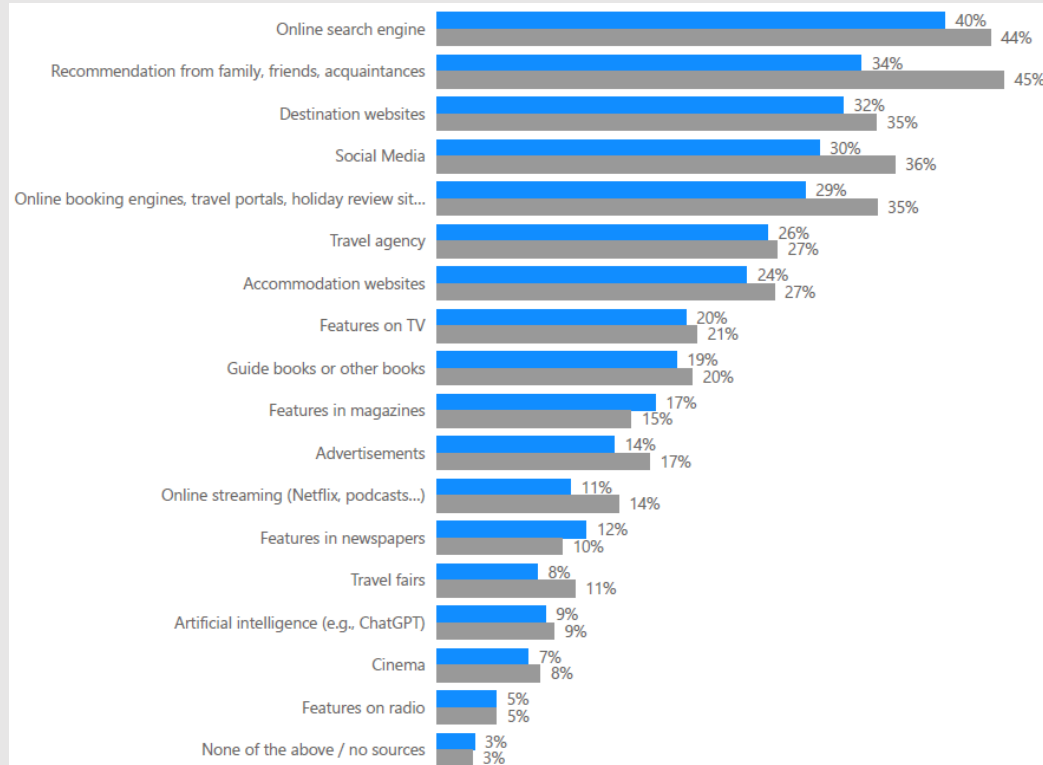
# Trip organisation and preferences (1)

— 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)



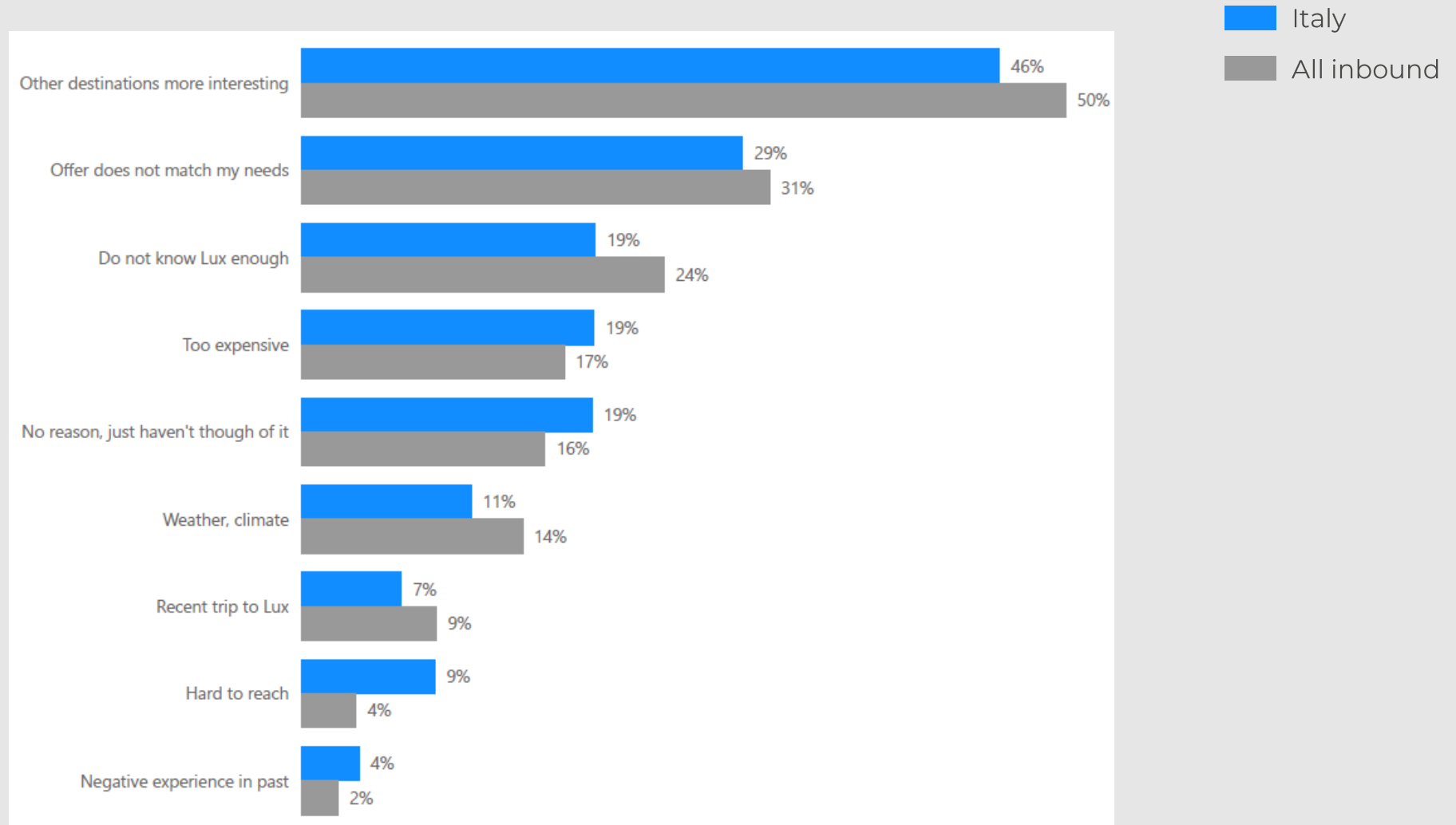


## Trip organisation and preferences (2)

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



### Reasons for not considering Luxembourg as a destination

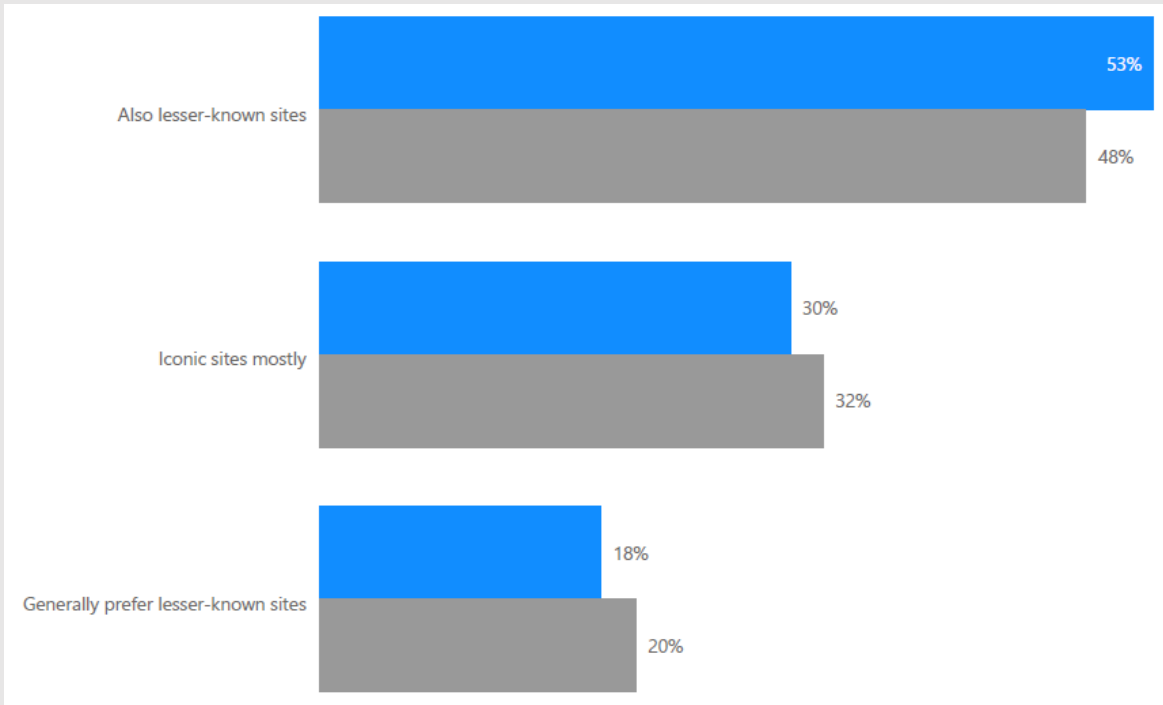


# Trip organisation and preference (3)

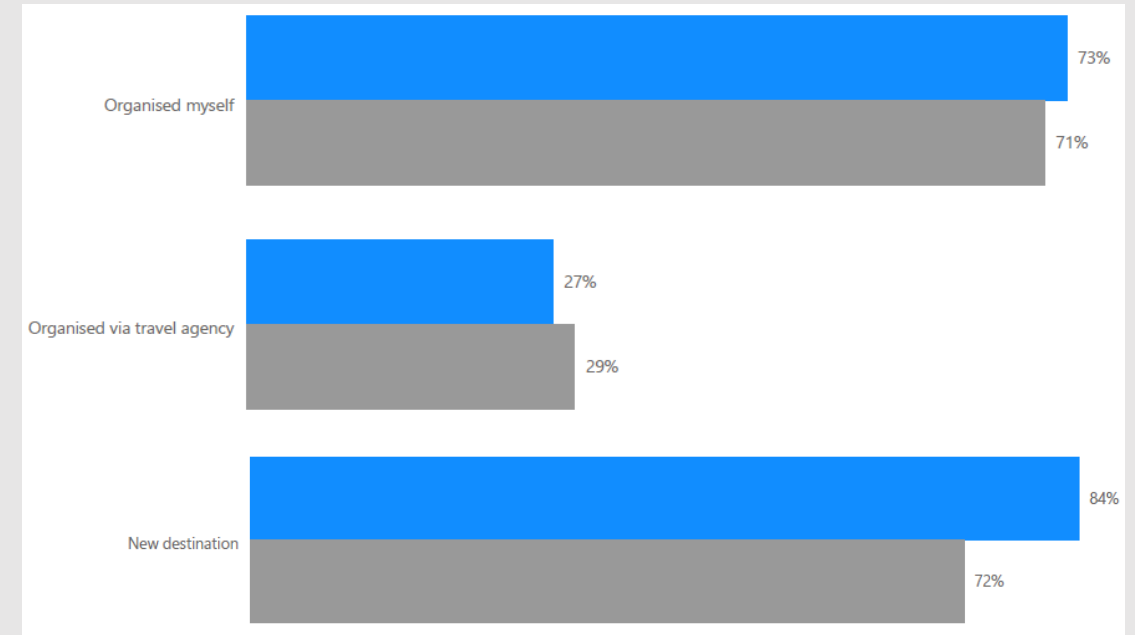
— Average **European source markets**, total vs. Italy



## 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



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