



Luxembourg for Tourism

# Market profile

# SWITZERLAND

2024



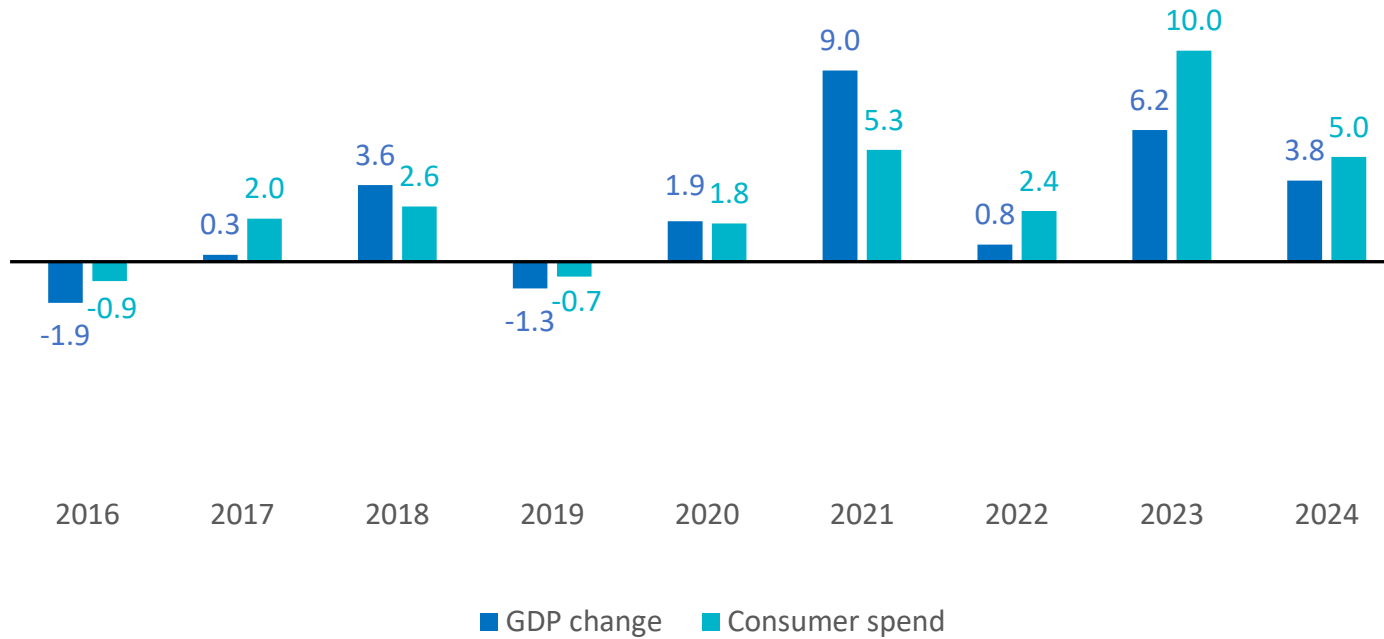


# **Economic indicators & General Travel Demand**

# Economic indicators – General travel demand



## GDP and consumer spending, % annual change



## Economy & population

**GDP (\$) per capita**  
**103,676.70**

**Unemployment (%)**  
**2.39**

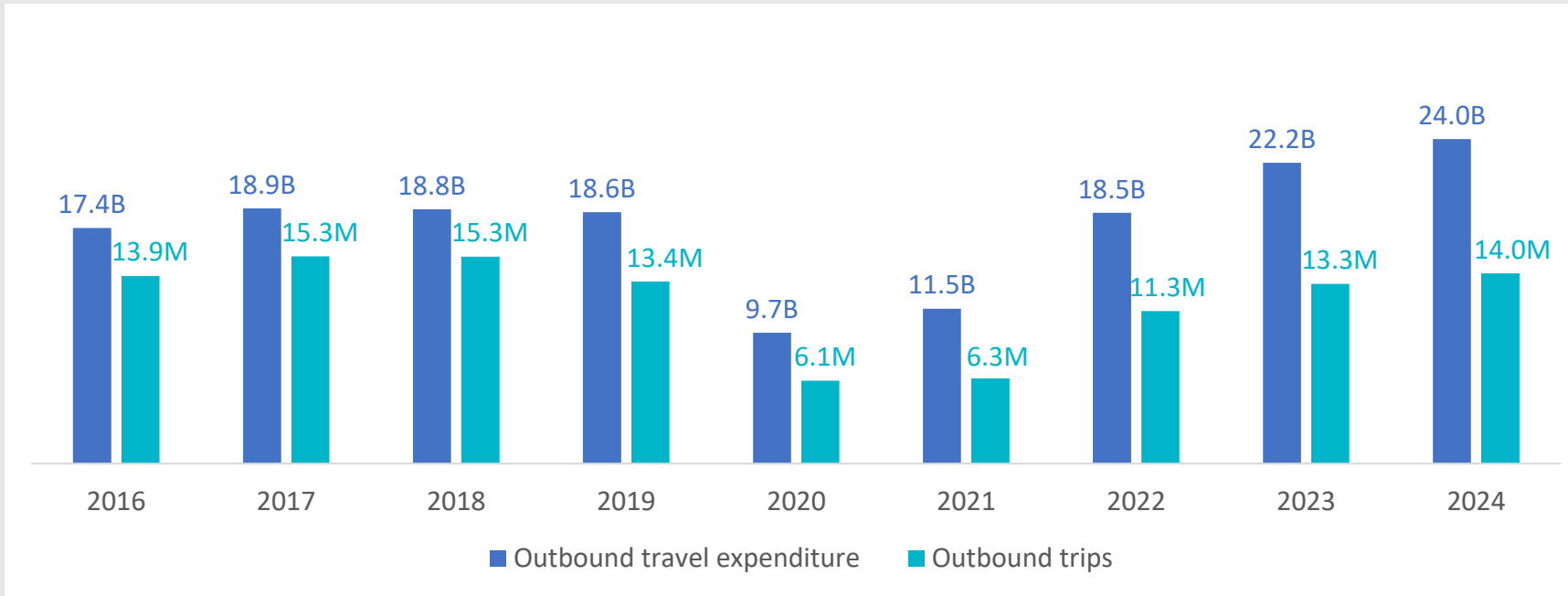
**Inflation(%)**  
**1.06**

**Population**  
**9,048,910**

# Economic indicators – General travel demand



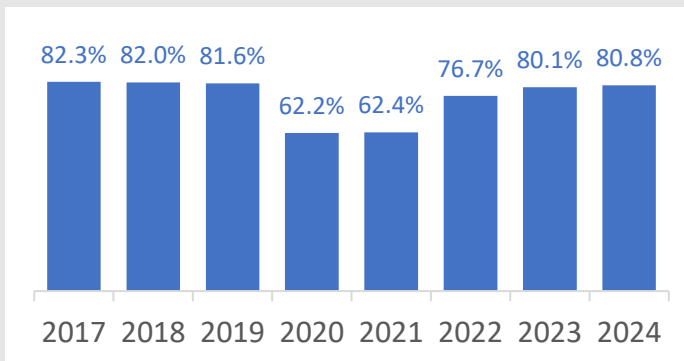
## Outbound trips and travel expenditure



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

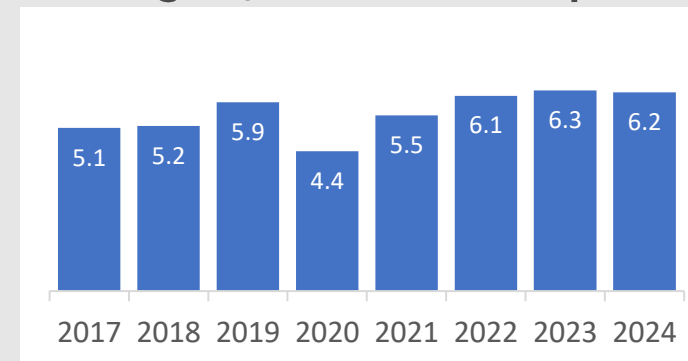
**Average spend**  
**per outbound trip (2024)**  
**1,706 \$**

## Share of outbound travel, % all nights



**Share of leisure,**  
**% all outbound trips**  
**(2024)**  
**86.6%**

## Average length of stay, nights, all outbound trips





# **Arrivals & nights in paid accommodation**

# Nights in paid accommodation

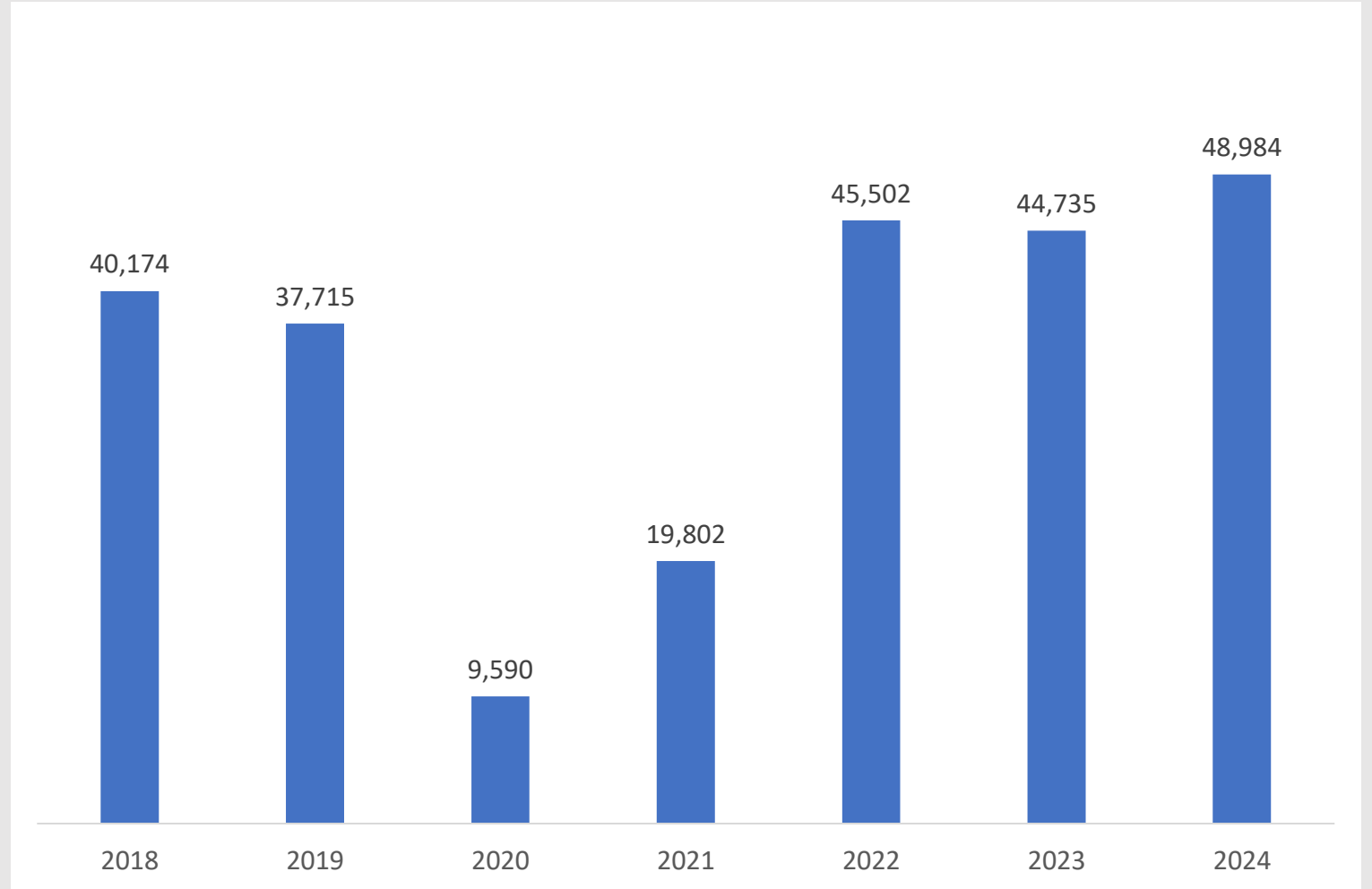
## 2024 and 2018-2024



Nights,  
paid accommodation, 2024



**+9% (vs. 2023)**  
**+30% (vs. 2019)**

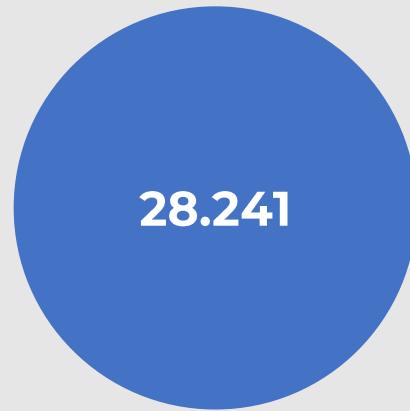


# Arrivals in paid accommodation

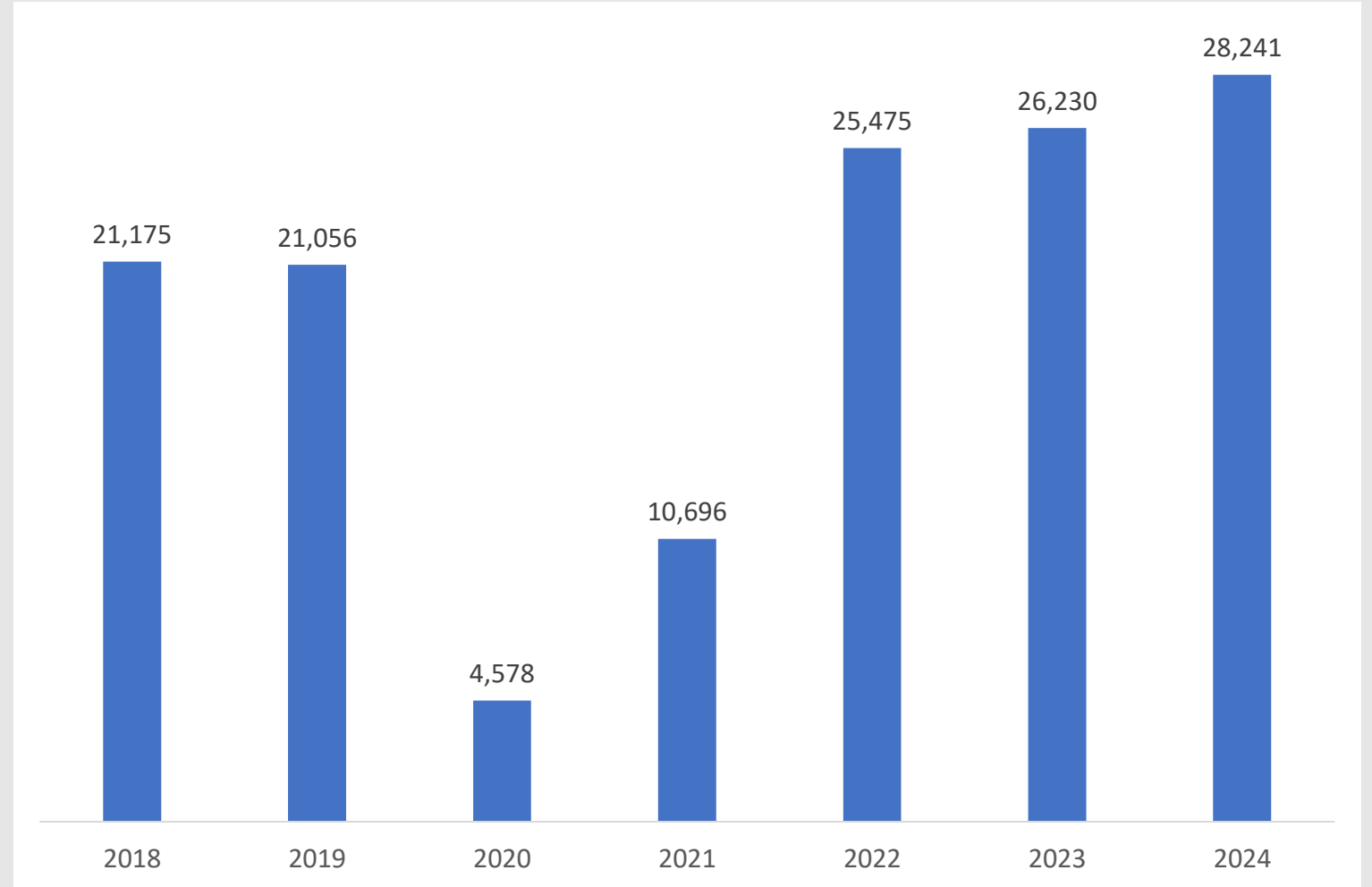
## 2024 and 2018-2024



Arrivals,  
paid accommodation, 2024



**+8% (vs. 2023)**  
**+34% (vs. 2019)**



# Length of stay, paid accommodation

## 2024 and 2018-2024

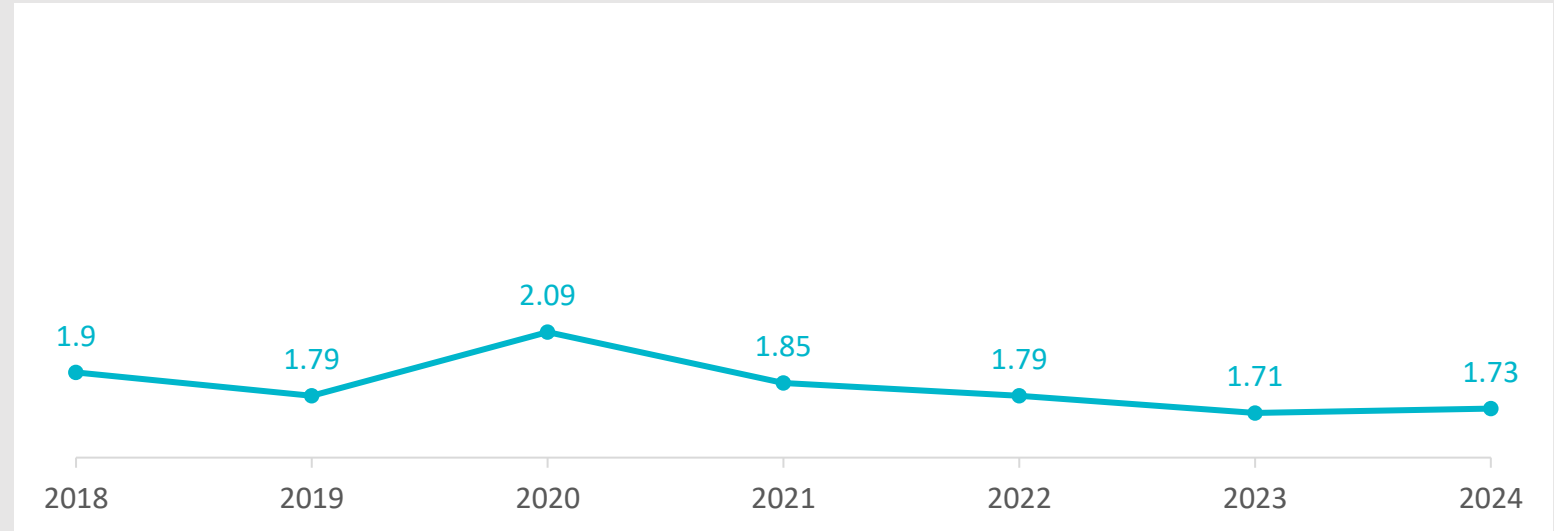


Average length of stay,  
paid accommodation, 2024



+0.02 nights (vs. 2023)

-0.06 nights (vs. 2019)



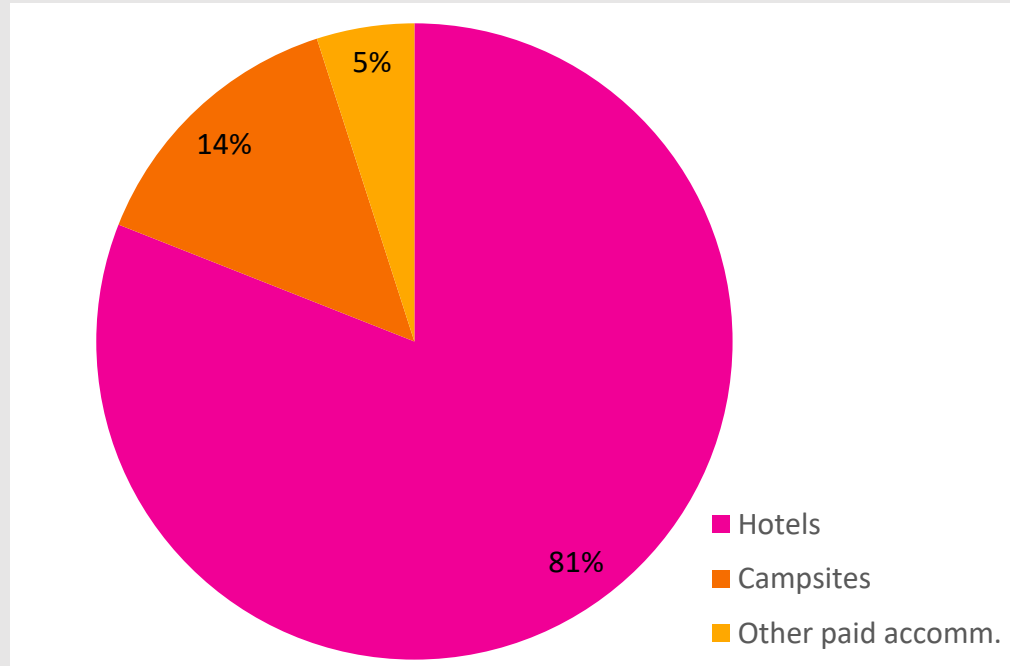


# Nights & arrivals in paid accommodation

Type of accommodation, 2024

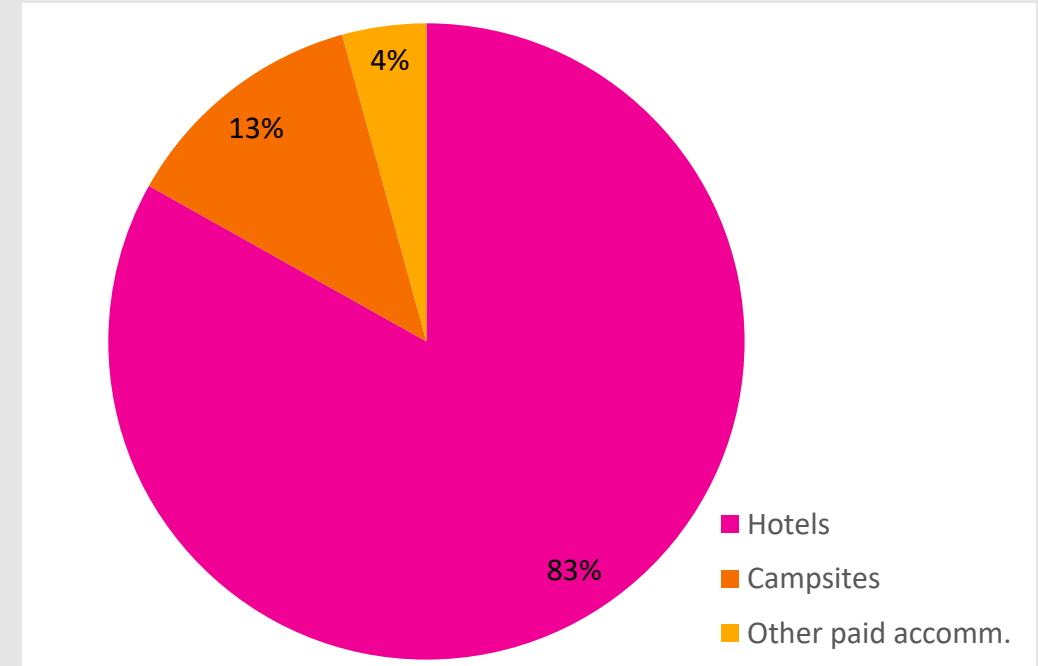


Nights,  
paid accommodation, 2024



Hotels	39.671	+10% (vs. 2023)	+27% (vs. 2019)
Campsites	6.883	-3% (vs. 2023)	+73% (vs. 2019)
Other paid accomm.	2.430	+44% (vs. 2023)	+1% (vs. 2019)

Arrivals,  
paid accommodation, 2024



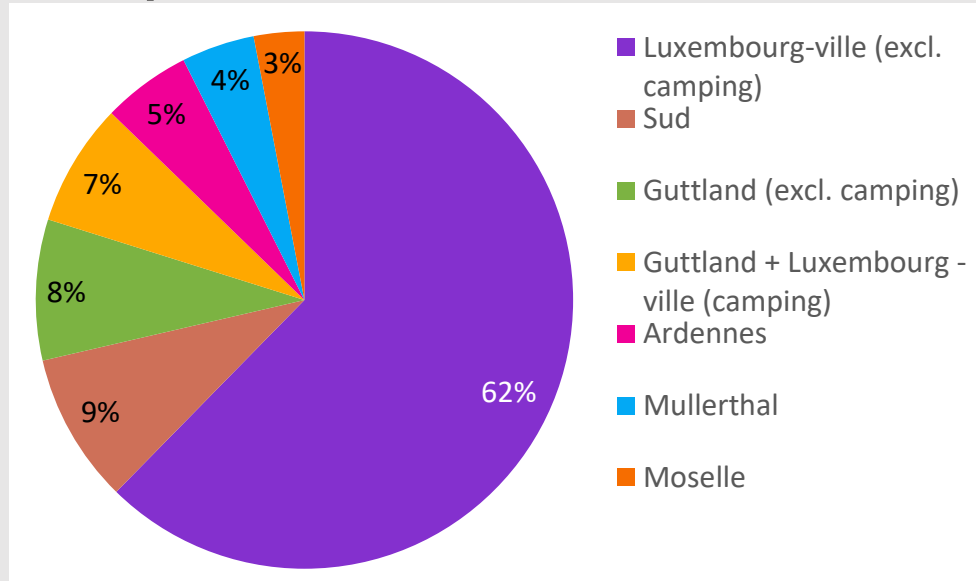
Hotels	23.478	+9% (vs. 2023)	+32% (vs. 2019)
Campsites	3.557	-5% (vs. 2023)	+60% (vs. 2019)
Other paid accomm.	1.206	+22% (vs. 2023)	+21% (vs. 2019)

# Nights & arrivals in paid accommodation

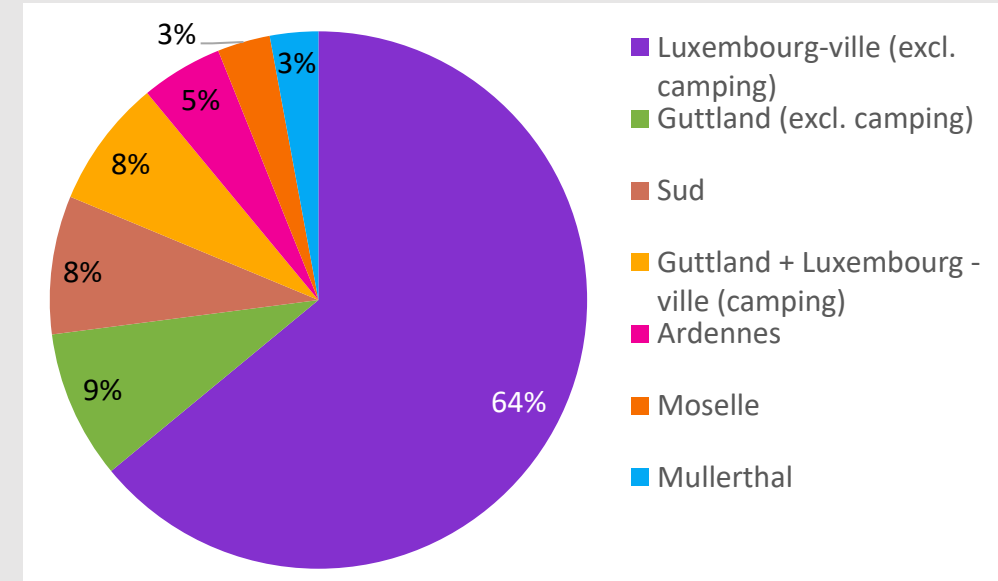
## Regions, 2024



**Nights,  
paid accommodation, 2024**



**Arrivals,  
paid accommodation, 2024**



Lux.-City (excl. camping)	30.539	+13% (vs. 2023)	+36% (vs. 2019)
South	4.425	+5% (vs. 2023)	+24% (vs. 2019)
Guttland (excl. camping)	4.149	+16% (vs. 2023)	+13% (vs. 2019)
Guttland/Lux.-City (camping)	3.623	-17% (vs. 2023)	+80% (vs. 2019)
Eislek	2.609	+12% (vs. 2023)	+5% (vs. 2019)
MPSL	2.153	+21% (vs. 2023)	+15% (vs. 2019)
Moselle	1.486	-3% (vs. 2023)	-9% (vs. 2019)

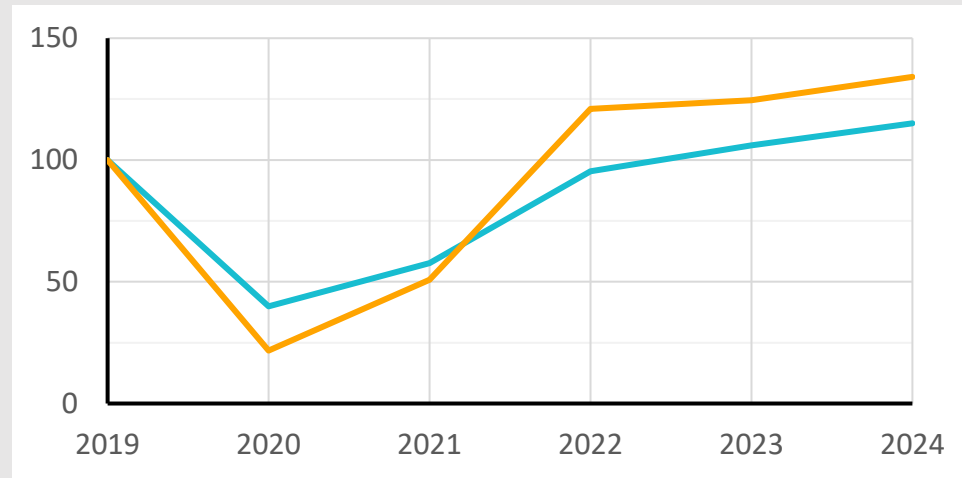
Lux.-City (excl. camping)	18.080	+11% (vs. 2023)	+41% (vs. 2019)
Guttland (excl. camping)	2.523	+16% (vs. 2023)	+21% (vs. 2019)
South	2.350	+2% (vs. 2023)	+14% (vs. 2019)
Guttland/Lux.-City (camping)	2.181	-16% (vs. 2023)	+64% (vs. 2019)
Eislek	1.389	+20% (vs. 2023)	+20% (vs. 2019)
Moselle	897	+5% (vs. 2023)	+4% (vs. 2019)
MPSL	821	+5% (vs. 2023)	+7% (vs. 2019)

# Arrivals in paid accommodation

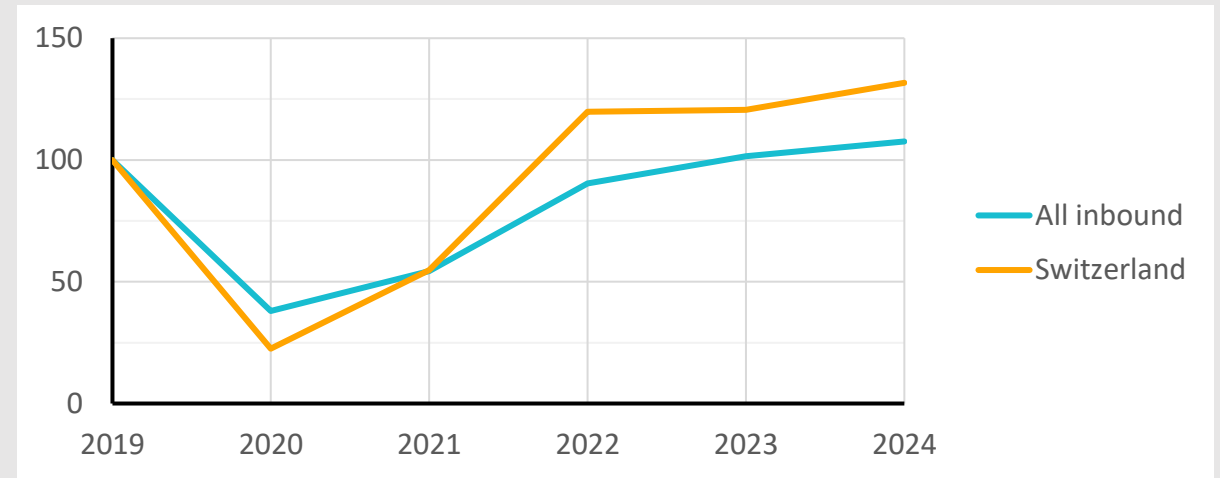
## Trends 2019-2024



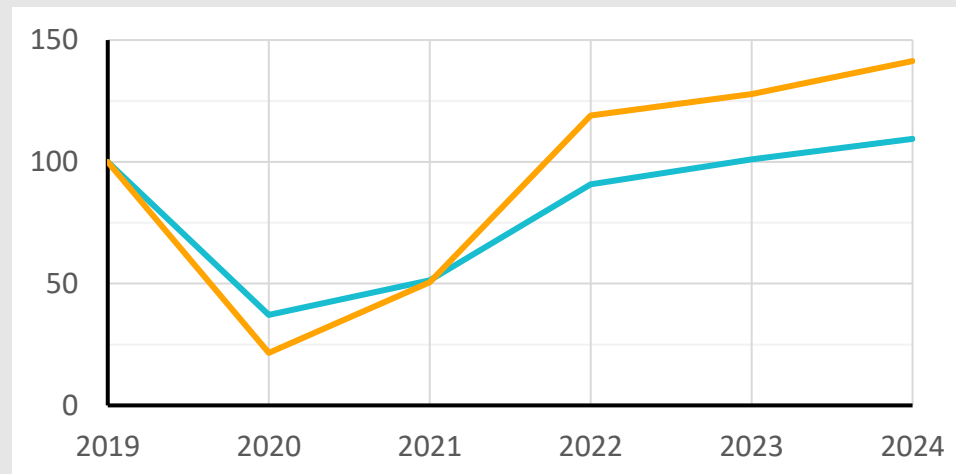
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

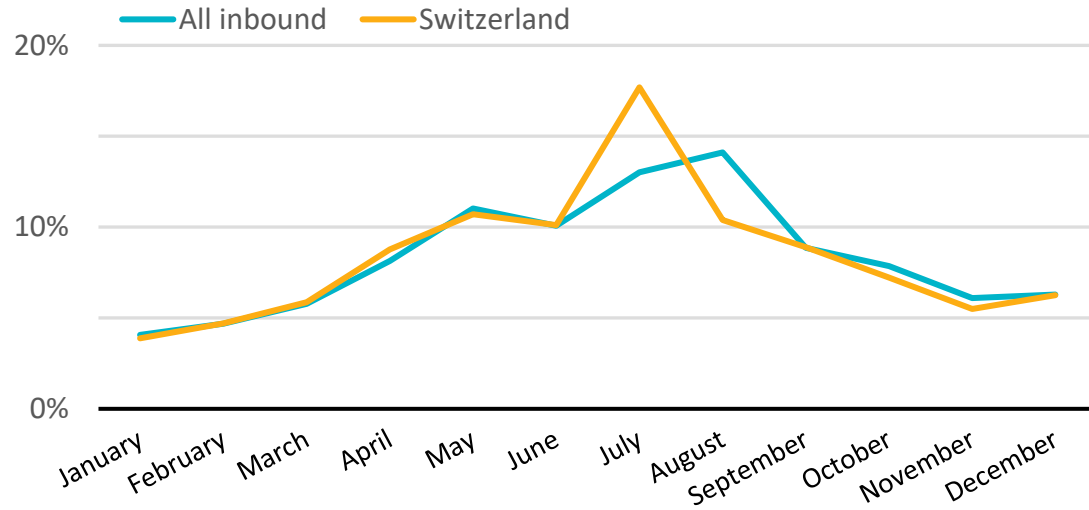


# Arrivals in paid accommodation

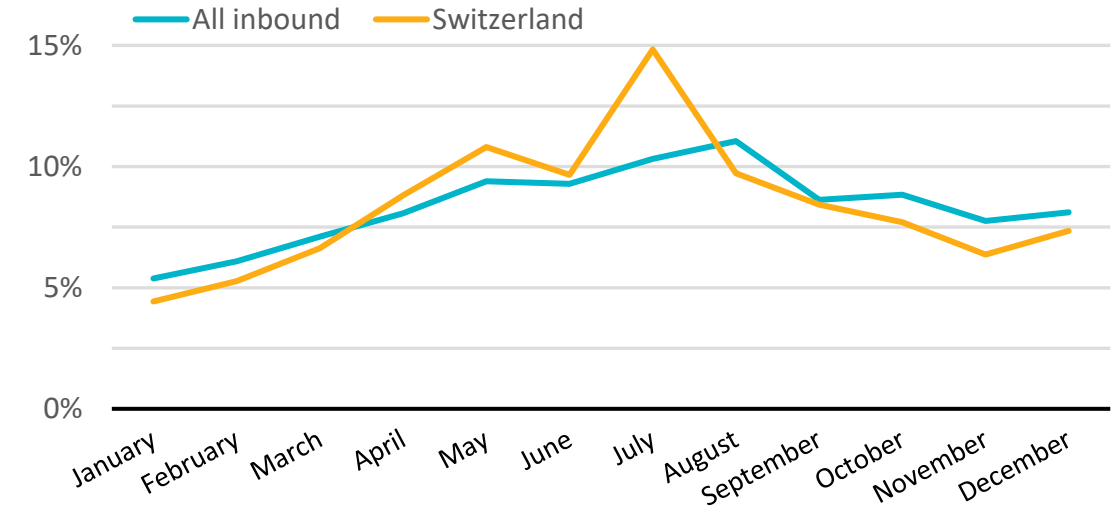
## Seasonality



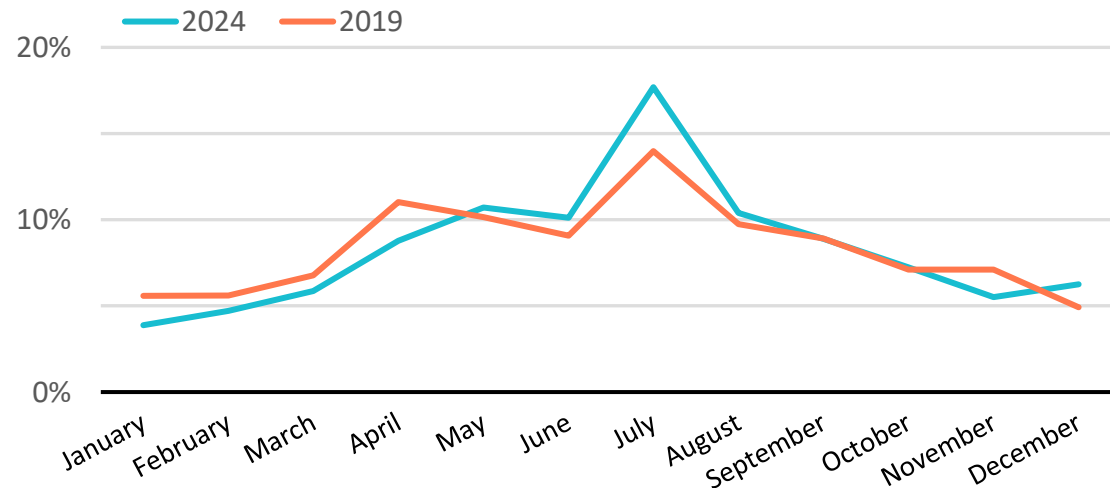
### All paid accommodation, 2024



### Hotels, 2024



### All paid accommodation, arrivals from Switzerland



# Short-term rentals

## 2024 and 2018-2024



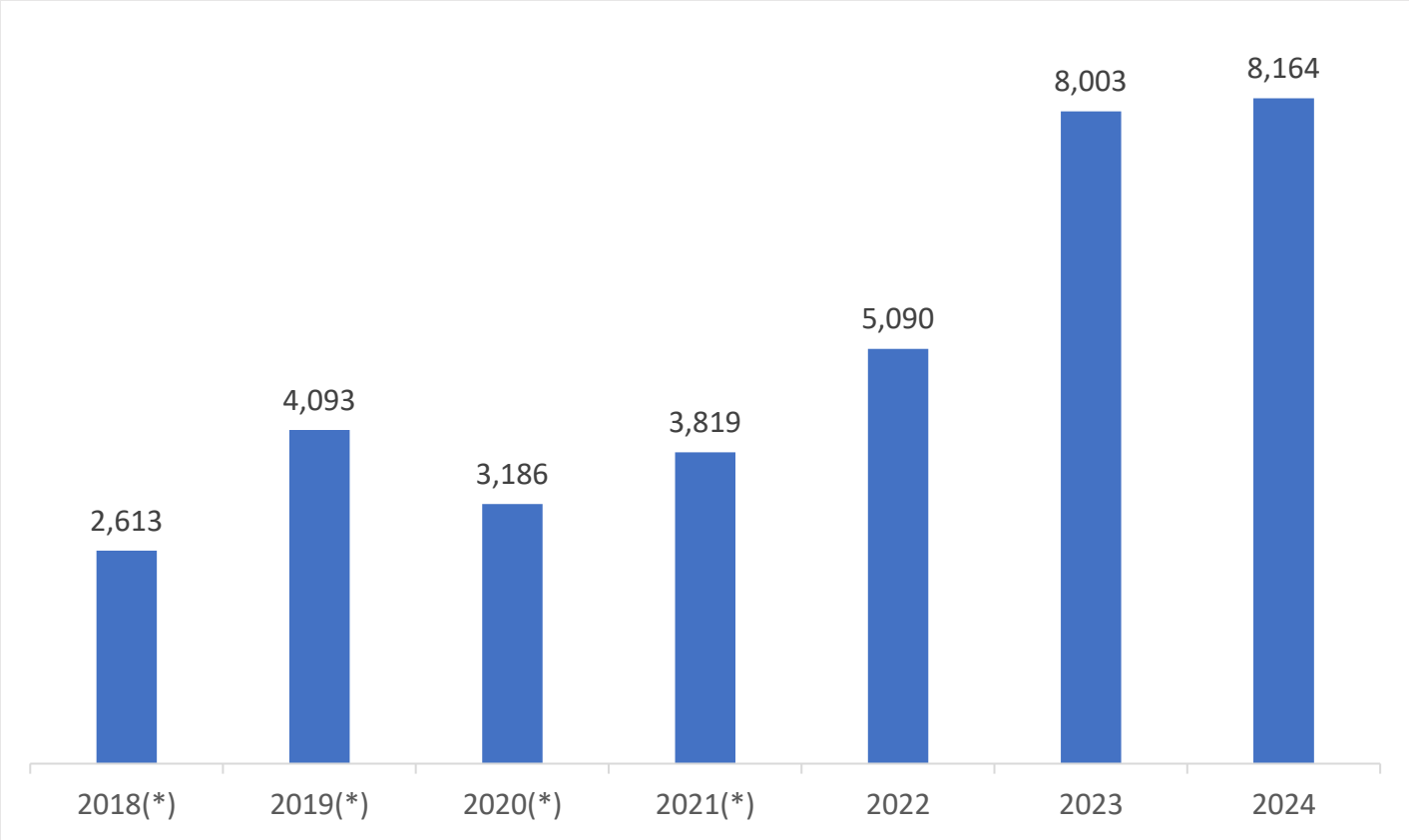
Nights,  
Short-term rentals, 2024



**2% (vs. 2023)**

**99% (vs. 2019)**

Nights,  
Short-term rentals, 2018-2024



(\*) Nights are only available for Switzerland + Lichtenstein.  
Nights available for Lichtenstein only:  
-2022: 3  
-2023: 24  
-2024: 19





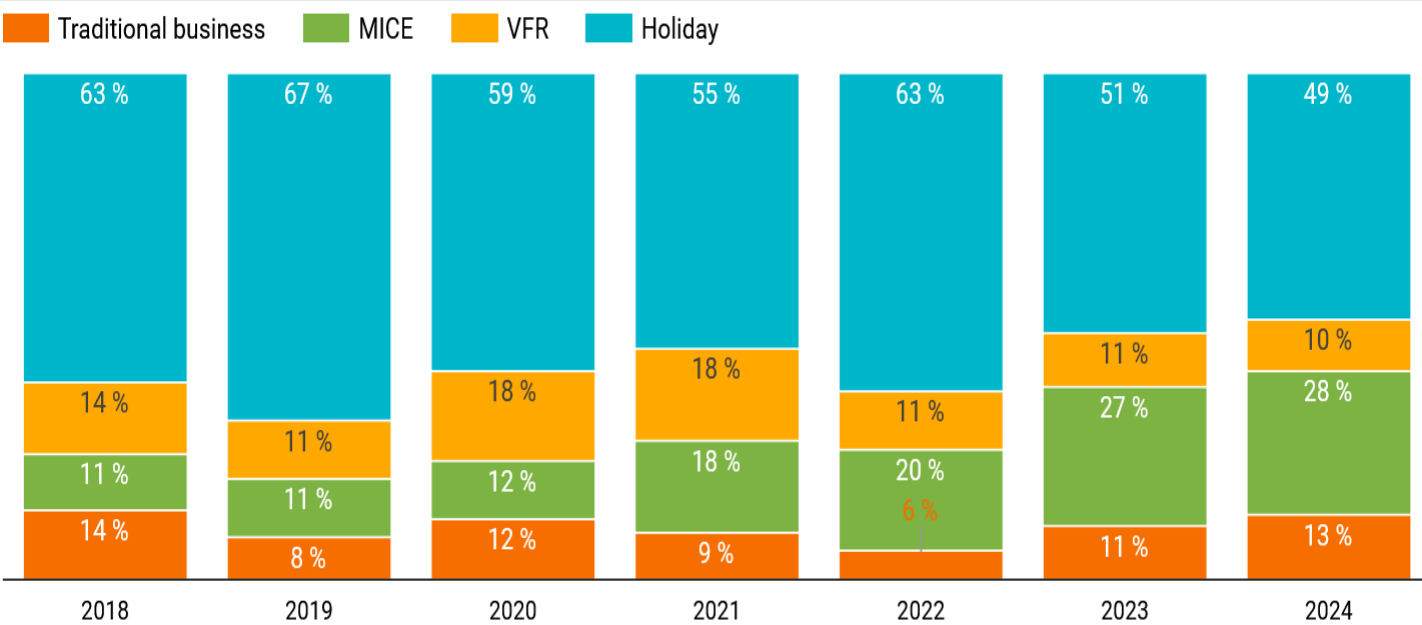
# **Characteristics of inbound trips**

# Swiss trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2018-2024

Swiss trips to Luxembourg, 2018-2024



2024

Switzerland to Luxembourg      Europe to Luxembourg

Holiday	49%	61%
VFR	10%	15%
MICE	28%	15%
Traditional Business	13%	8%

# Inbound same-day trips to Luxembourg

## 2024



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



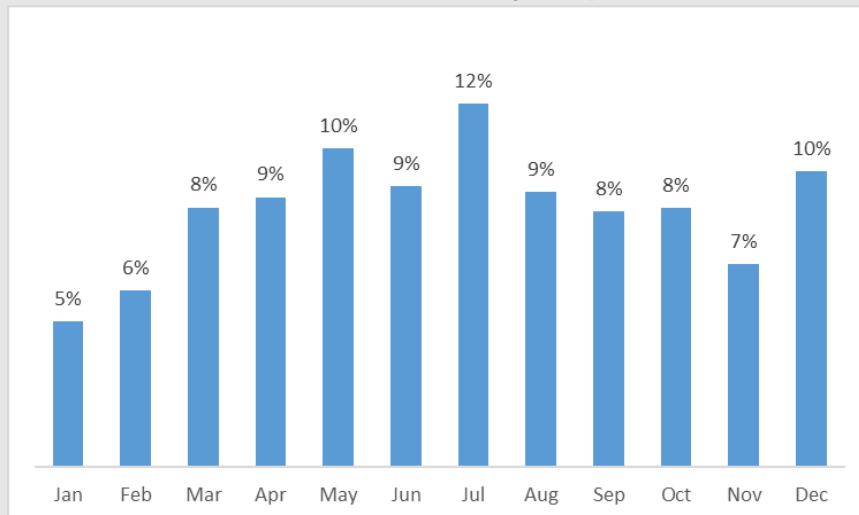
+16% (vs. 2023)

Average length  
of same-day trips



-0,3 h (vs. 2023)

Seasonality  
% of same-day trips



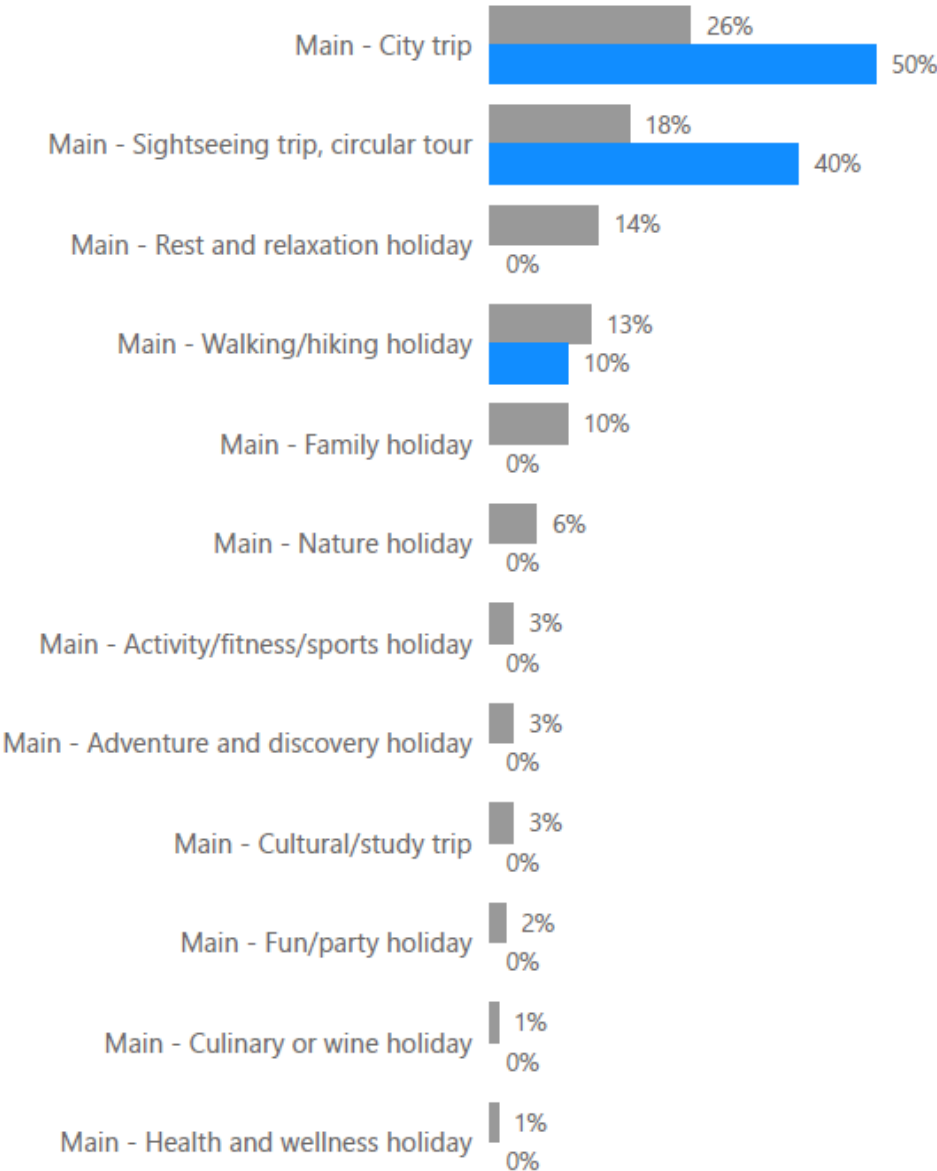


# **Travel behaviour of inbound leisure visitors**

Main holiday types

Visitors with overnight

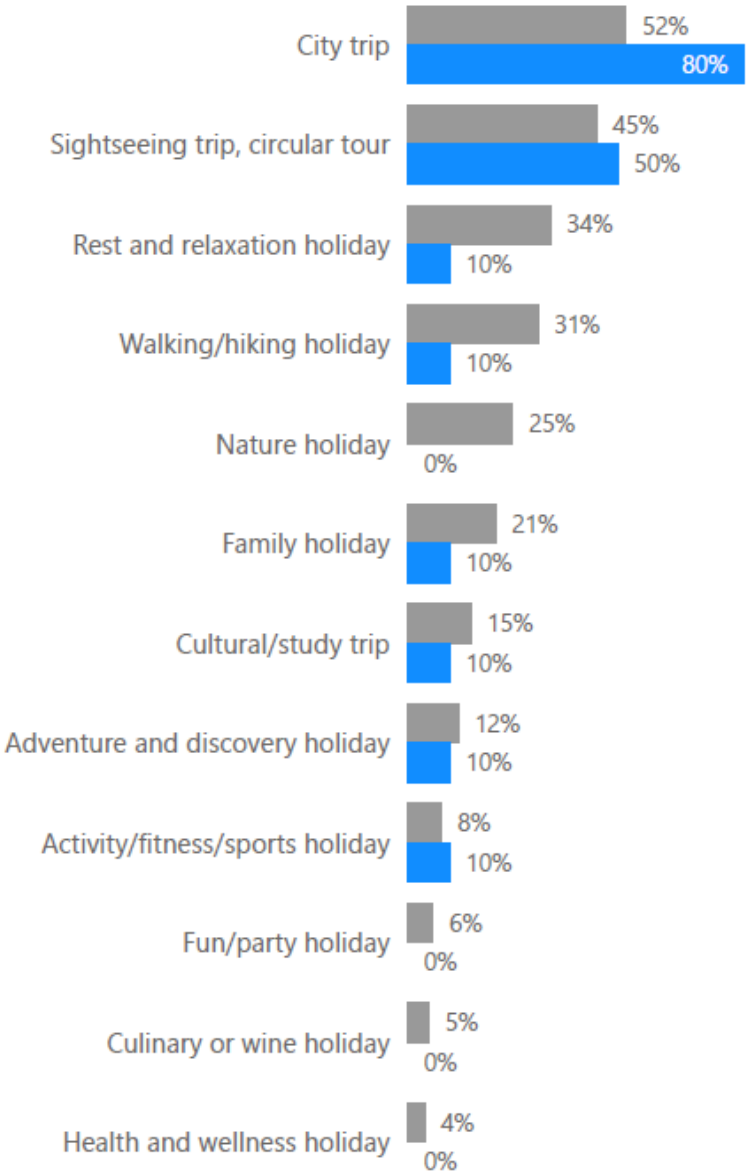
● All Inbound ● Switzerland



All holiday types

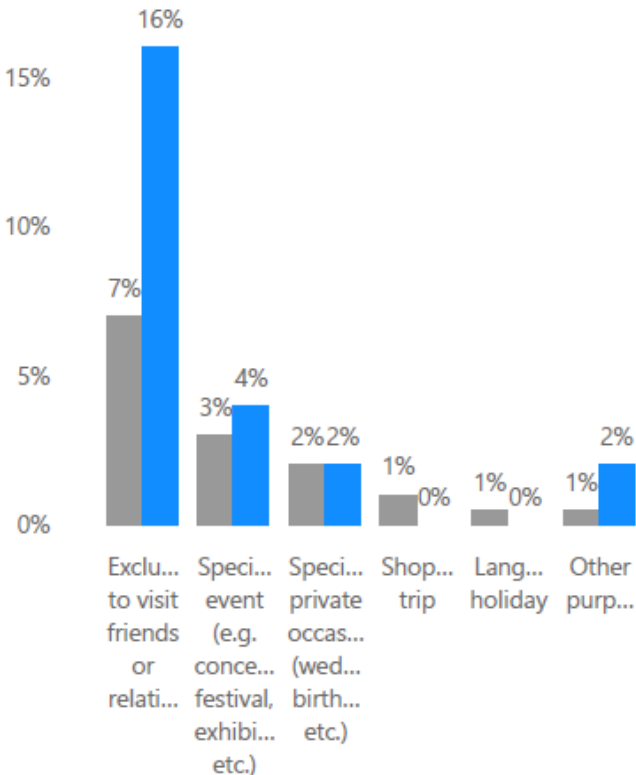
Visitors with overnight

● All Inbound ● Switzerland



Main purpose of overnight trip (if not holiday)

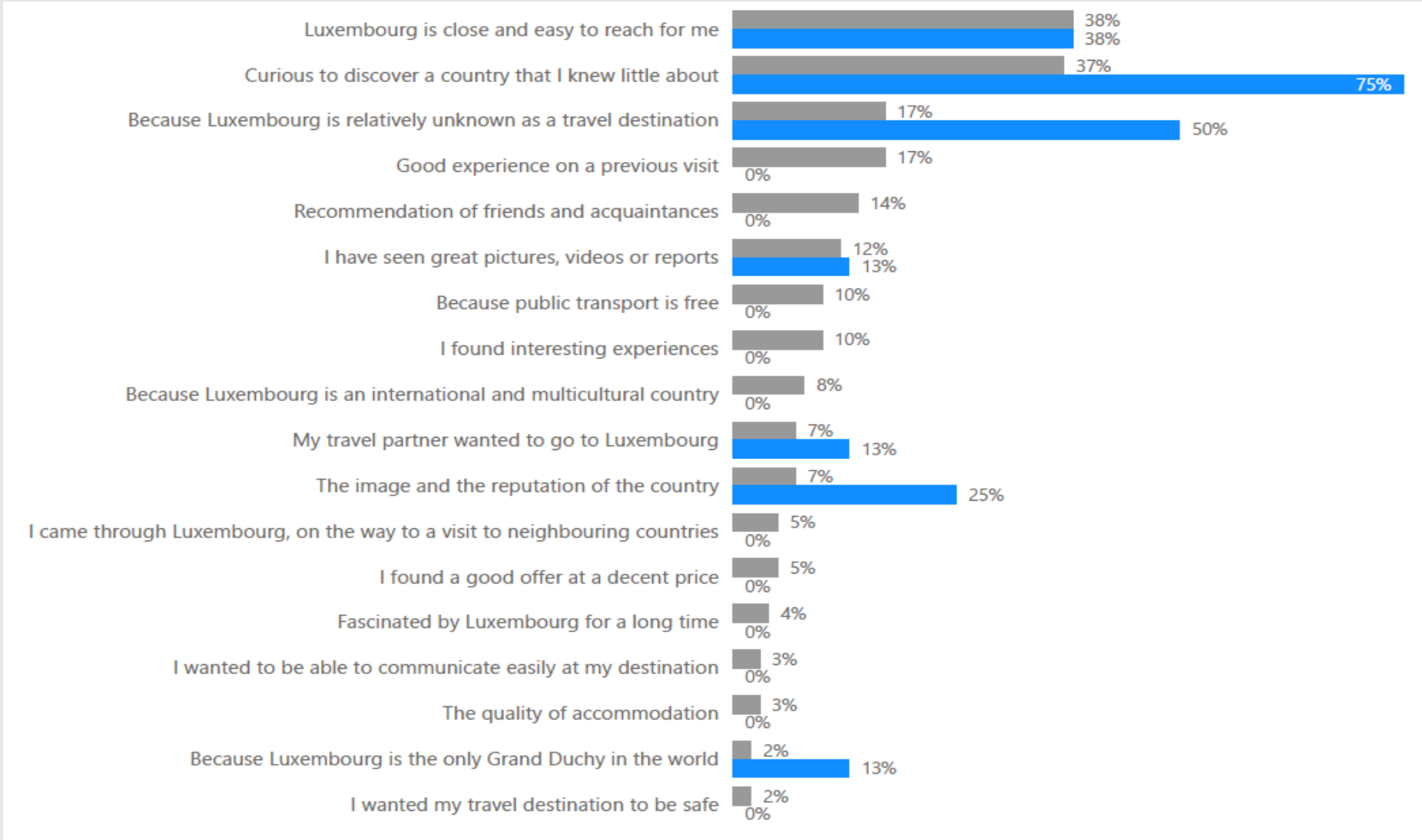
● All Inbound ● Switzerland





# Key decision criteria for choosing Luxembourg

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



■ All inbound  
■ Switzerland

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

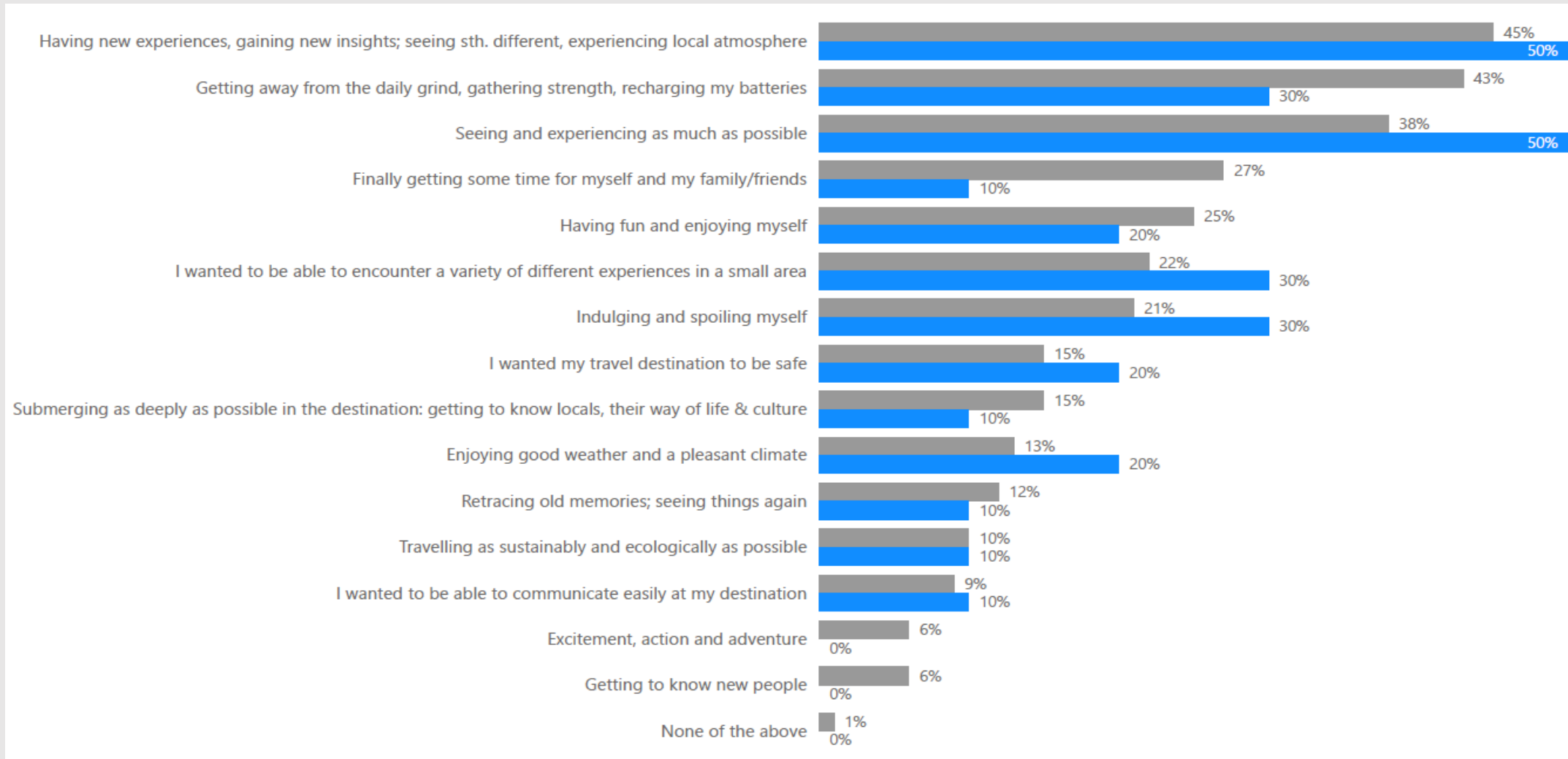
# Key travel motives

## Inbound leisure visitors with overnight, 2023-2024



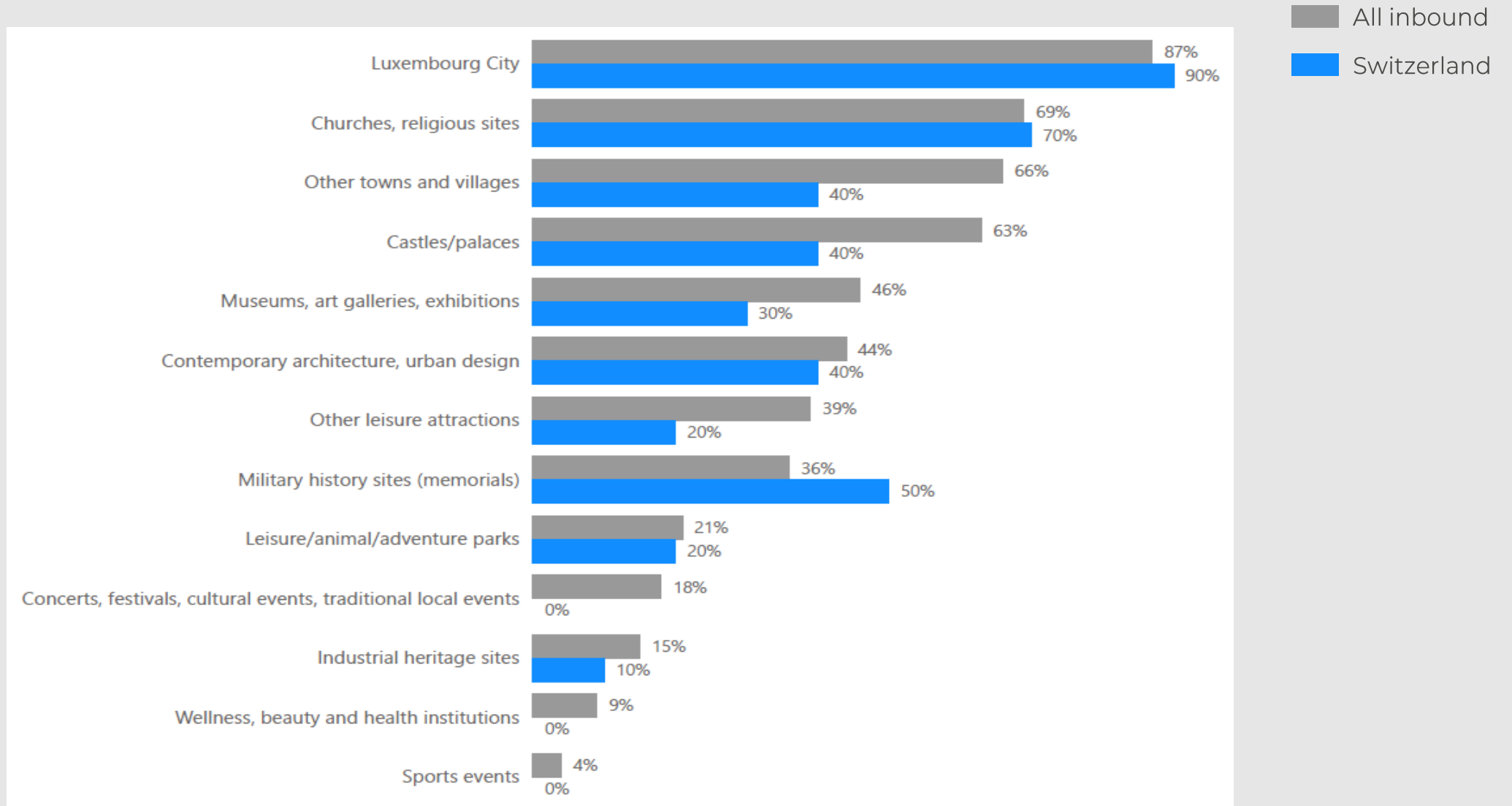
All inbound

Switzerland



# Type of places visited in Luxembourg

## Inbound leisure visitors with overnight, 2023-2024

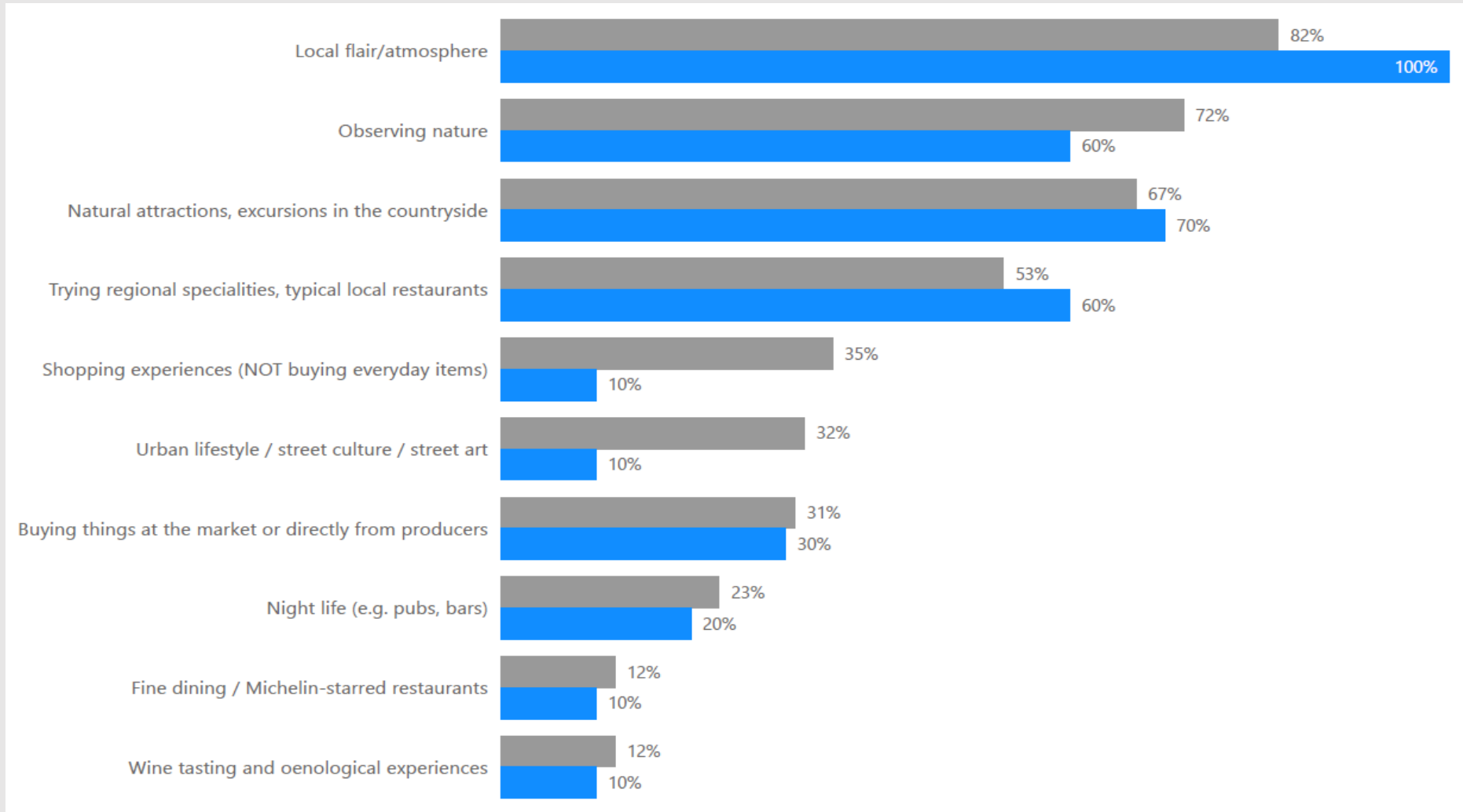


# Non-sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



■ All inbound  
■ Switzerland



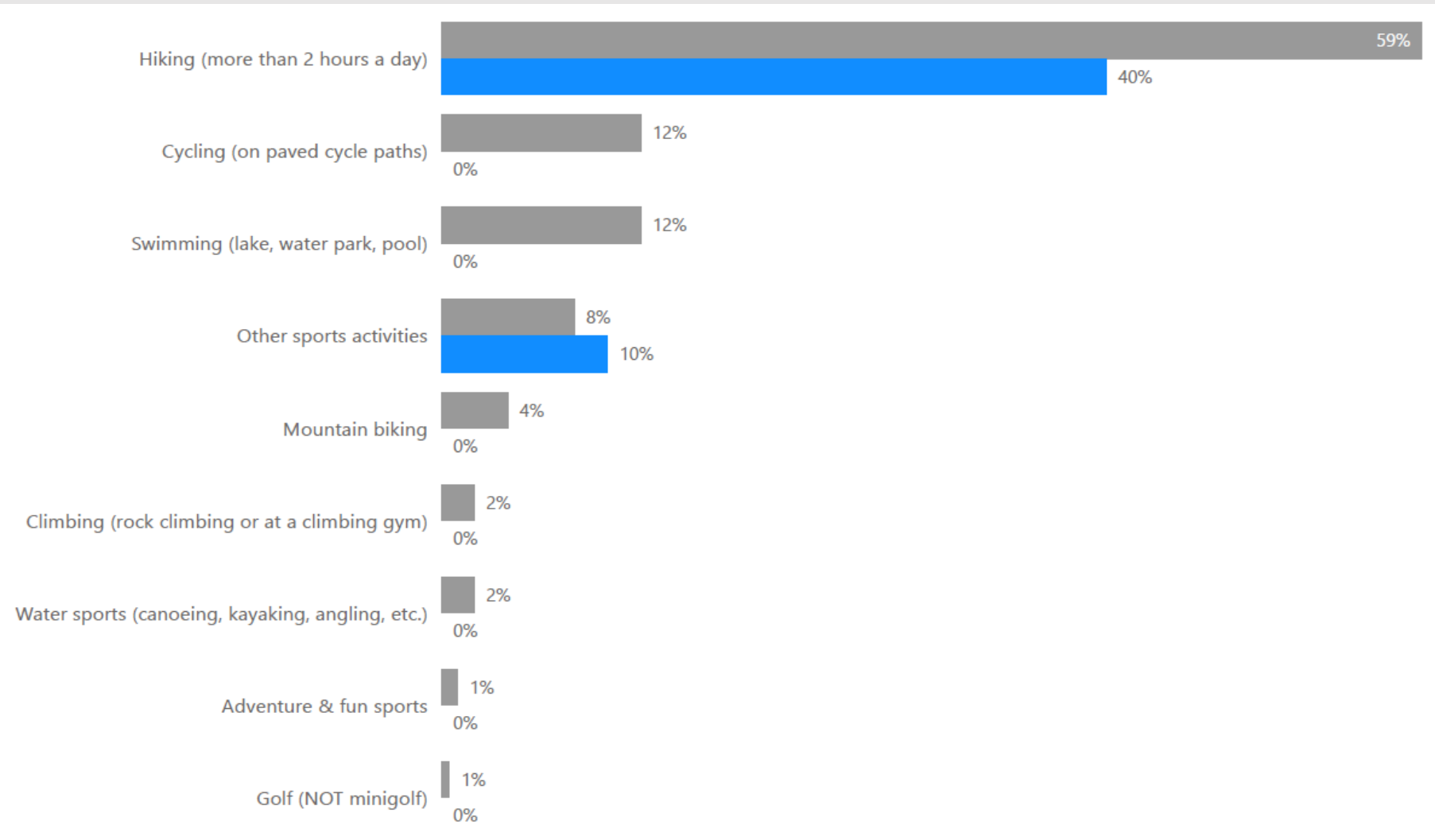
# Sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



■ All inbound

■ Switzerland





# Age groups

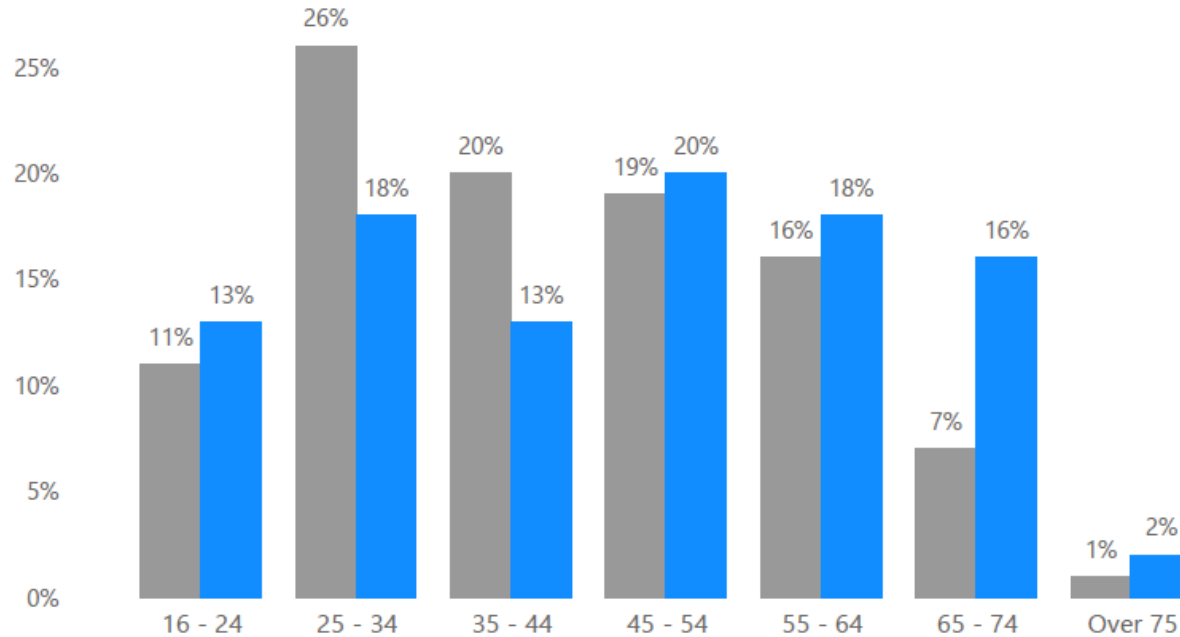
## Inbound leisure visitors with overnight, 2023-2024



■ All inbound  
■ Switzerland

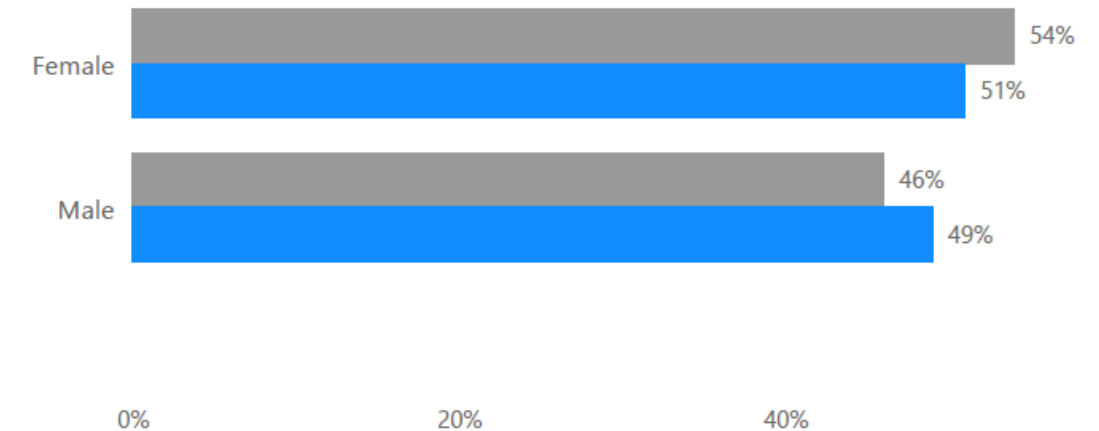
### Age

Visitors with overnight



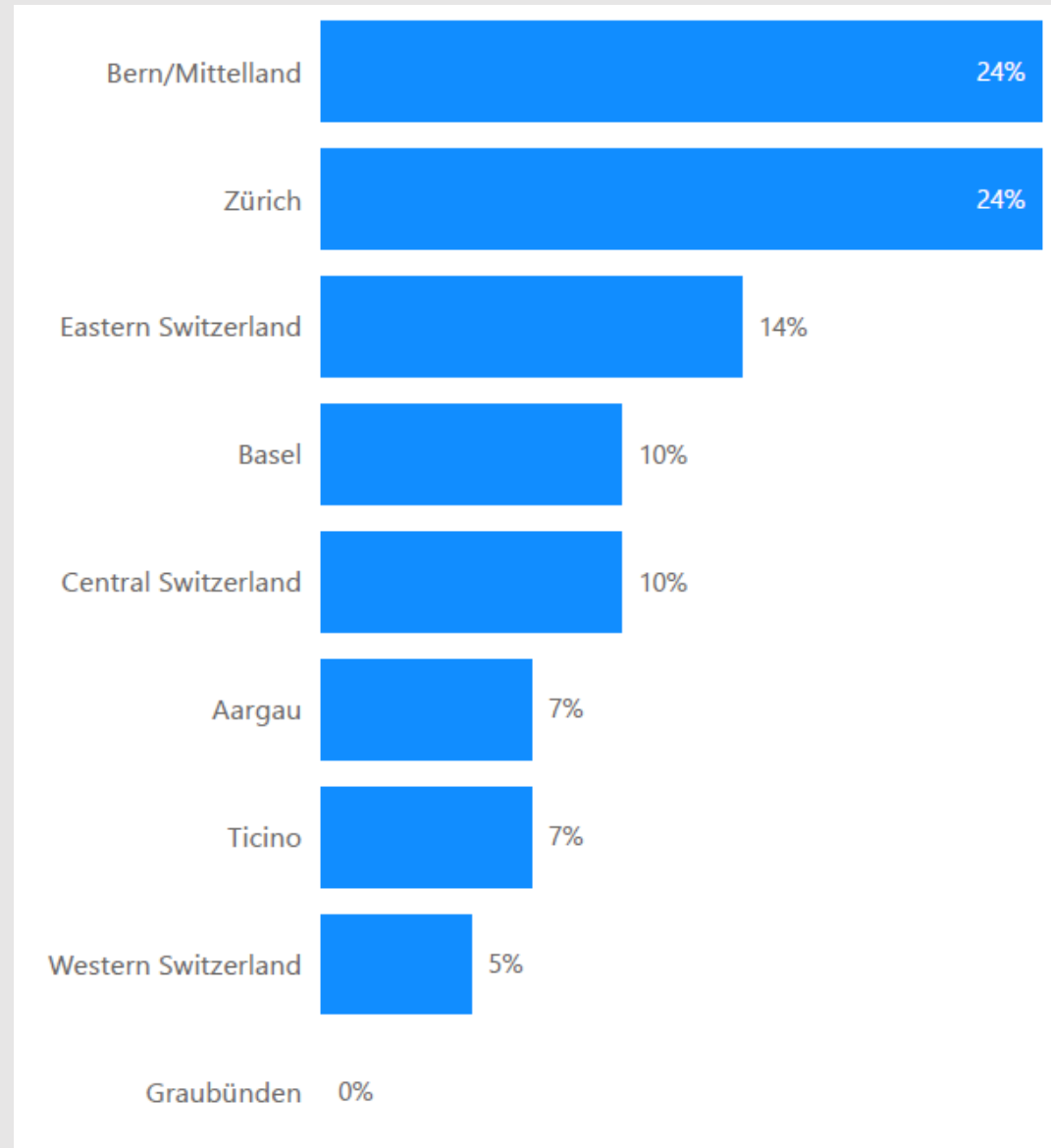
### Gender

Visitors with overnight



# Region of origin

Inbound leisure visitors with overnight, 2023-2024

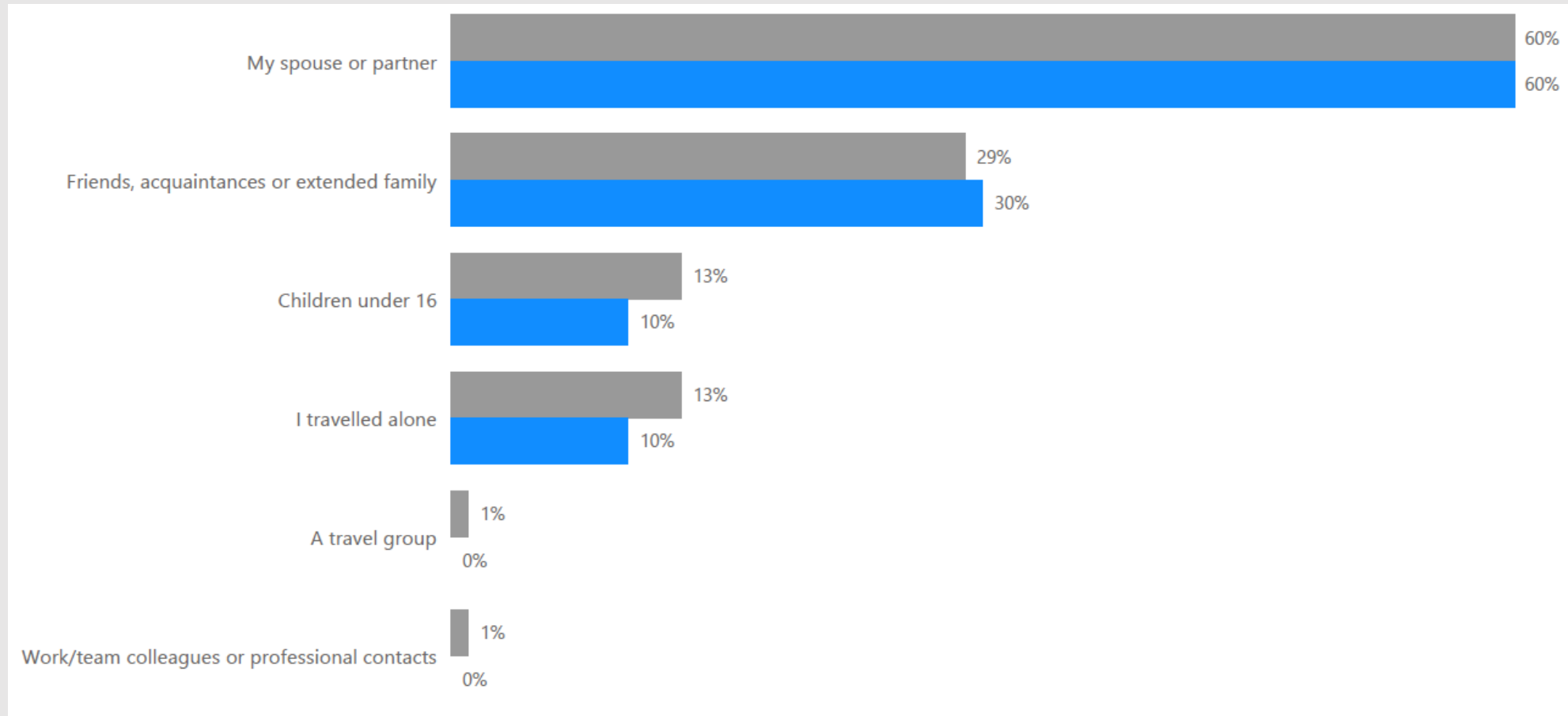


# Travel party

## Inbound leisure visitors with overnight, 2023-2024



■ All inbound  
■ Switzerland



# Transport, new visitors and cross-border trips

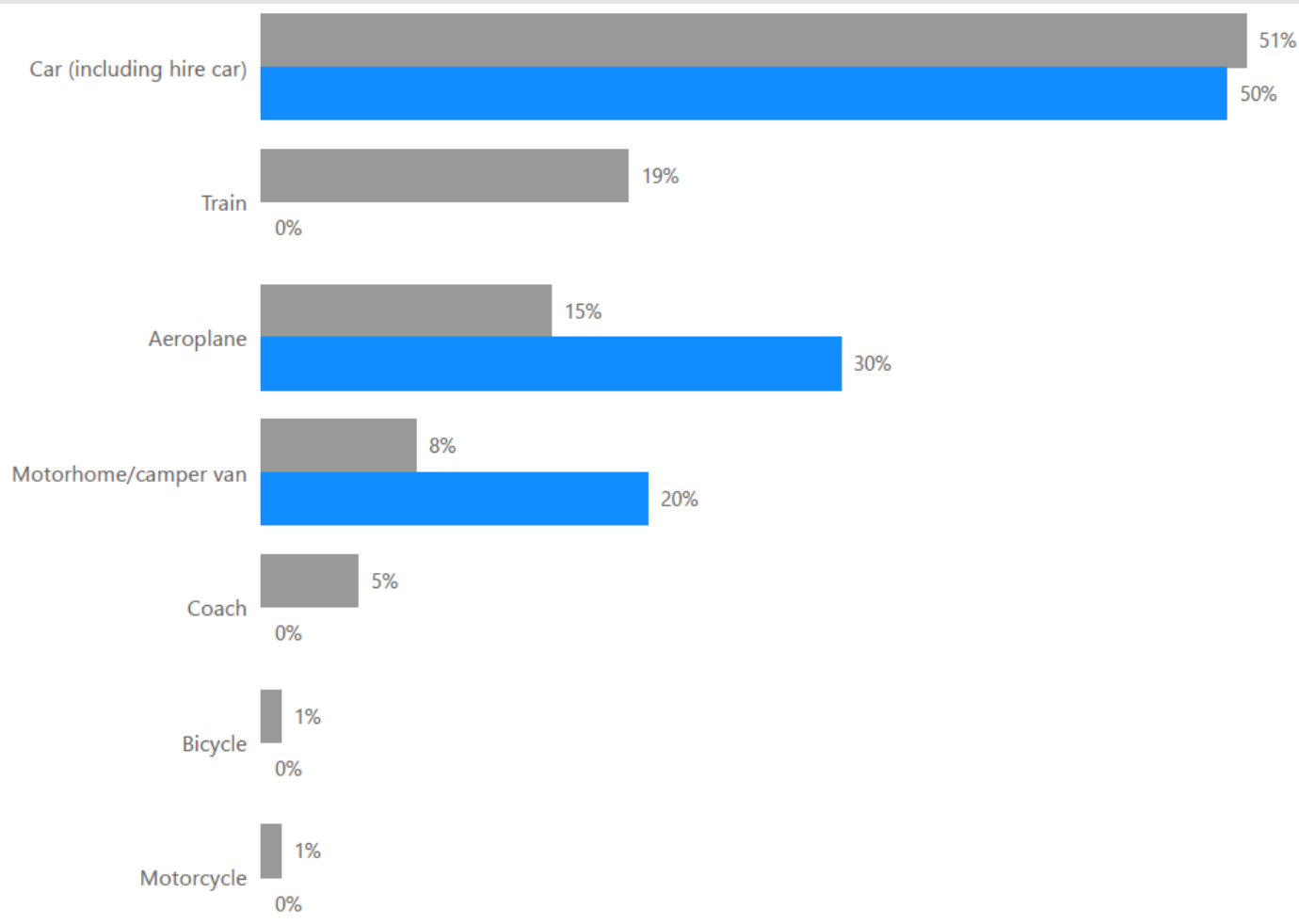
Inbound leisure visitors with overnight, 2023-2024



## Mode of transport to access Luxembourg

■ All inbound

■ Switzerland



### First-time visitors

Visitors with overnight

**63%**

All Inbound

**64%**

Switzerland

### Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

**39%**

All Inbound

**70%**

Switzerland

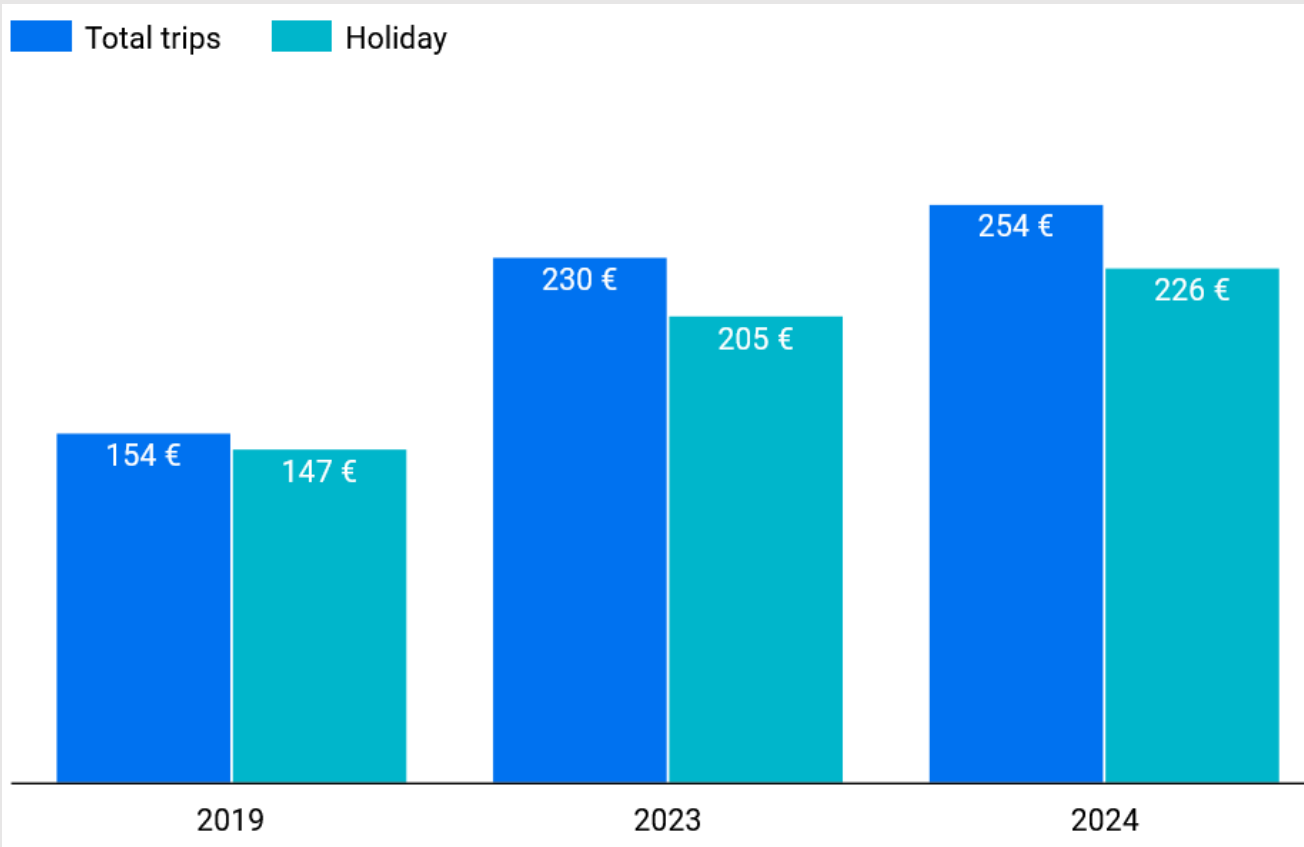
# Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

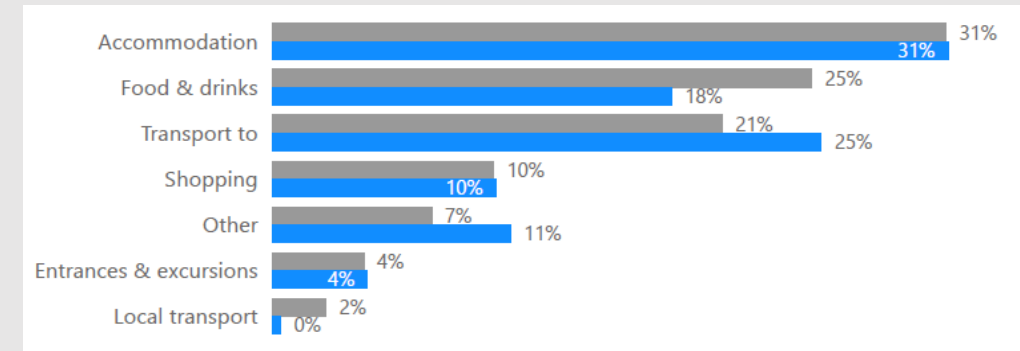


■ All inbound  
■ Switzerland

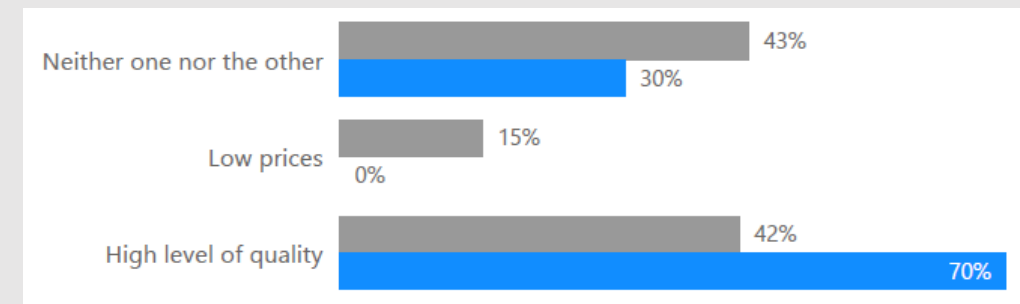
## Average expenditure/pers./day



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



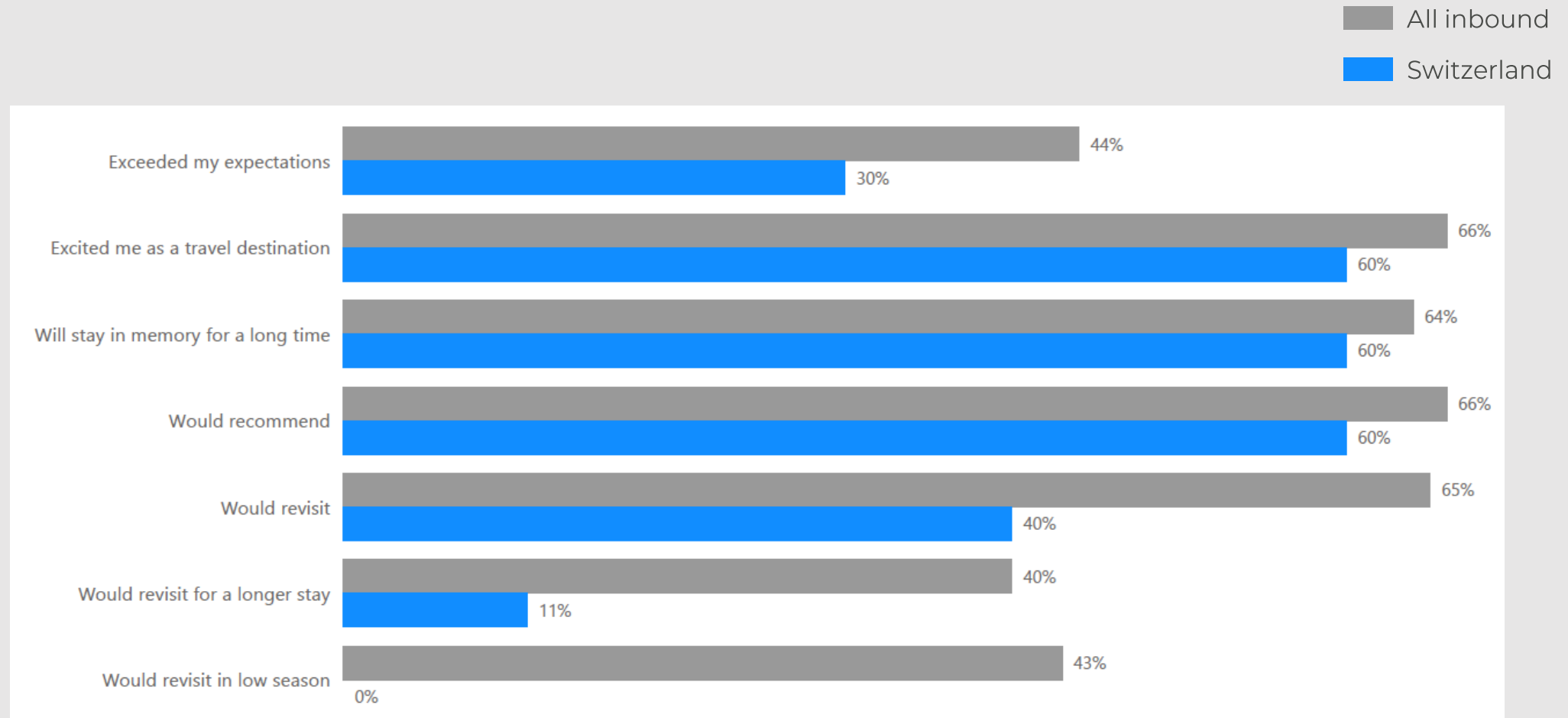
## Quality vs. price-orientation of leisure inbound visitors, 2023-2024





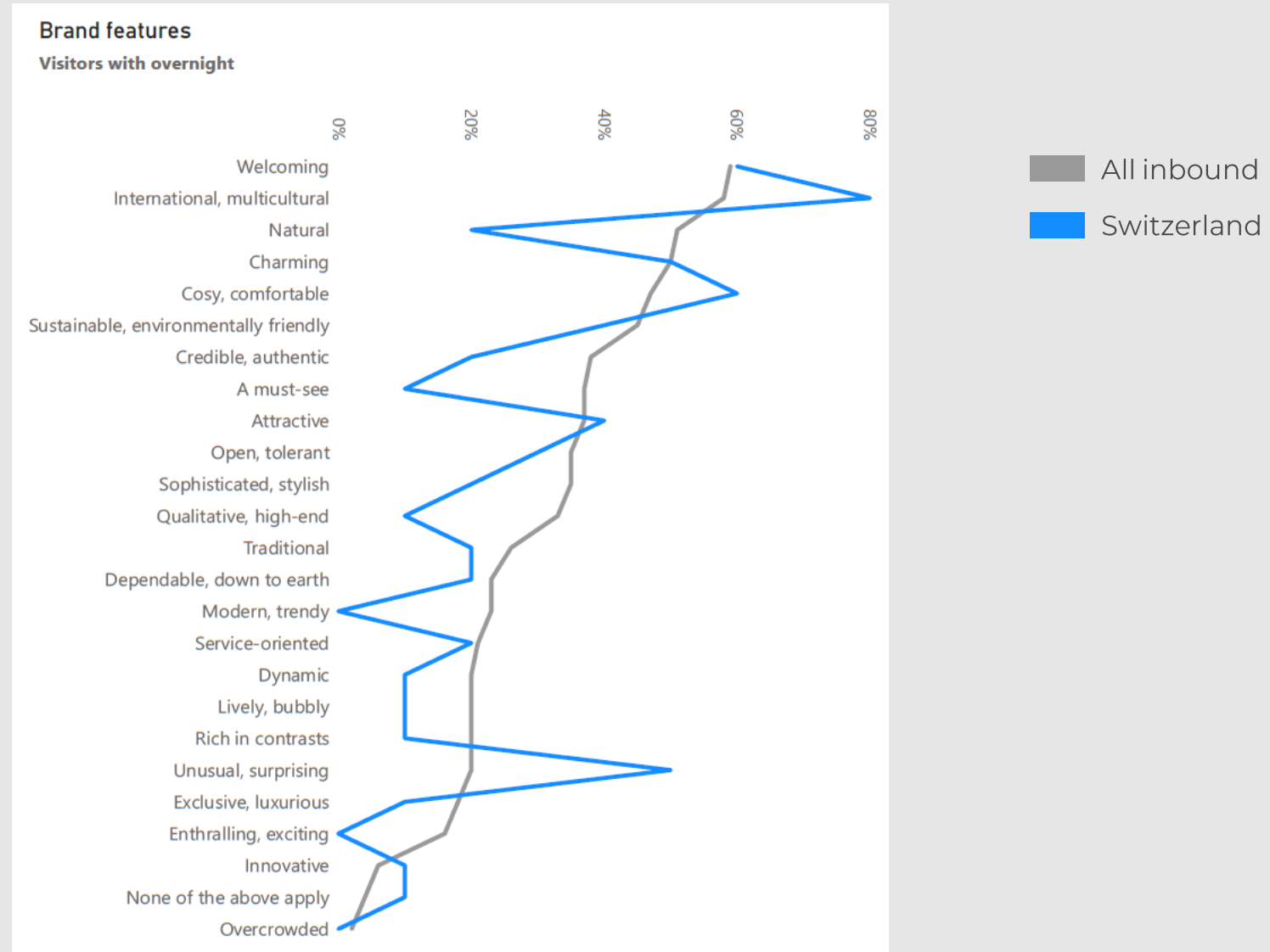
# Visitor satisfaction and recommendation

Inbound leisure visitors, 2023-2024



# Brand features perception

Inbound leisure visitors with overnights, 2023-2024



# LFT Target Segments



Switzerland

All inbound

Explorers



Nature-Loving Actives



Relaxation Seekers



Short Breakers



Perfection Seekers



Leisure Oriented

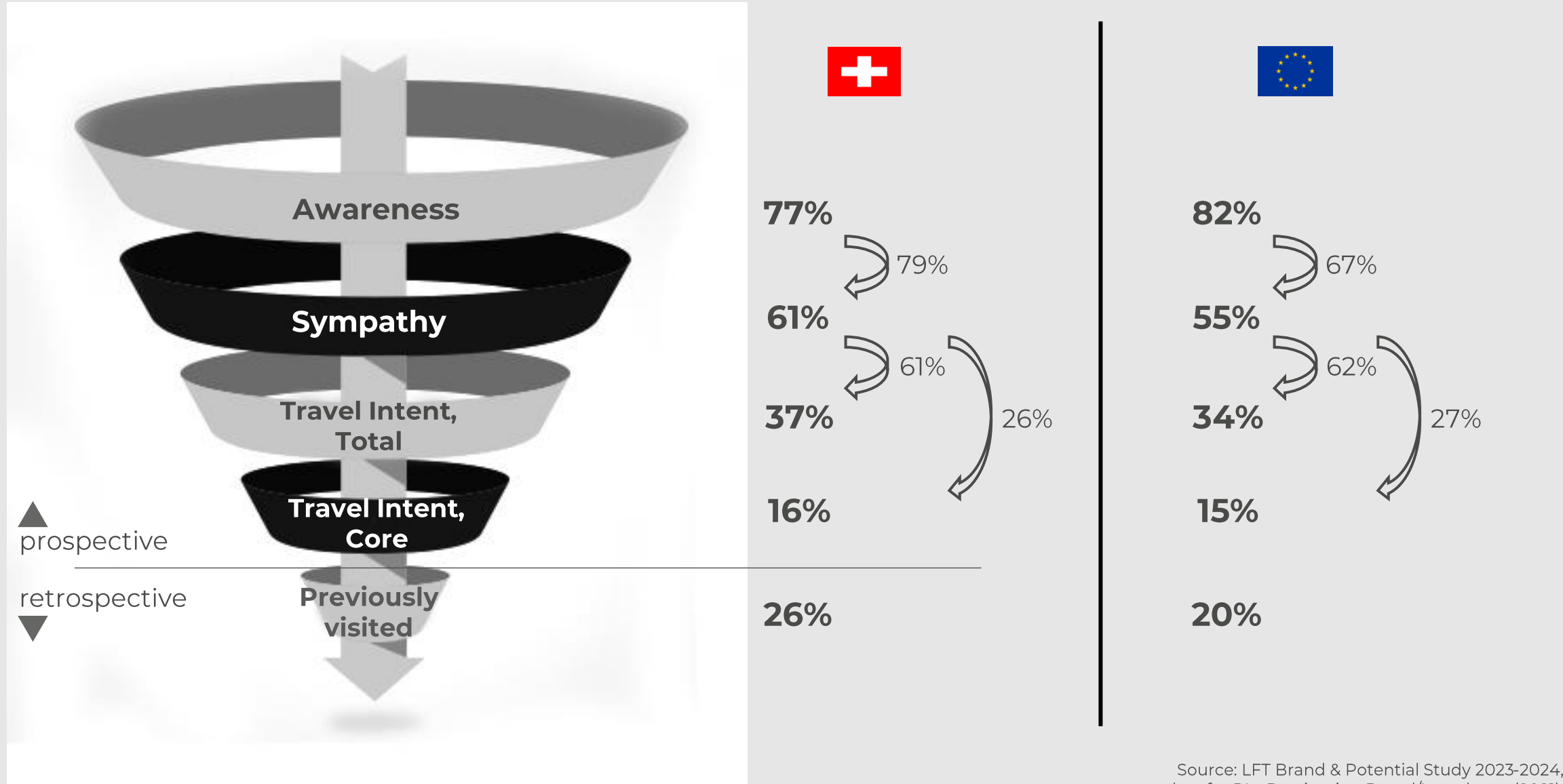




# **Target segments, Brand & Growth Potential**

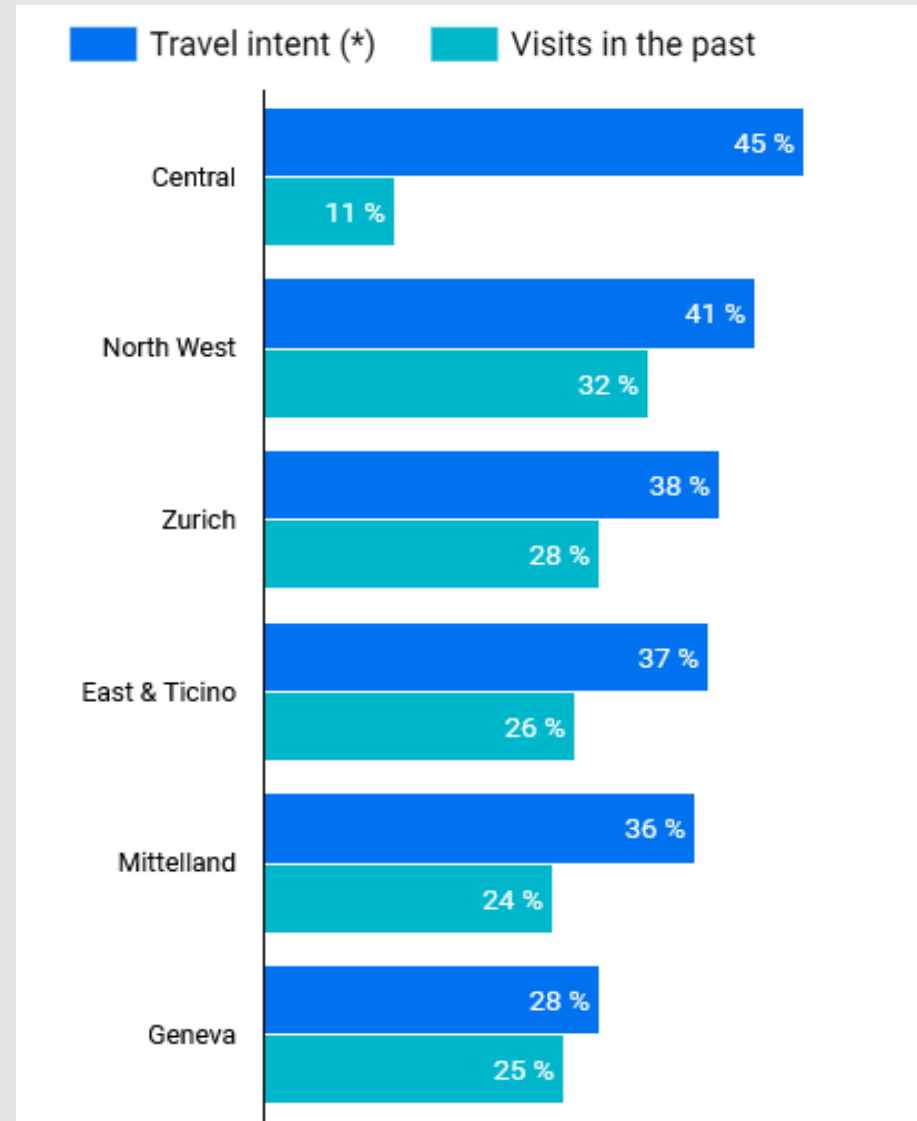
# Destination Luxembourg - Brand Funnel 2024

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






# Regional origin 2024

## Past visitors and future potential



# General theme interest (\*)



Theme			
	Rank	Rank	% interested
Nature	3	1	71%
Culinary	2	2	71%
Resting/Relaxation	1	3	70%
Immersive travel	6	4	68%
Sightseeing	4	5	67%
City	5	6	66%
Architecture/townscapes	7	7	66%
Fun/entertainment	8	8	62%
Learning/new skills	14	9	61%
Culture	11	10	60%
Exchanging with locals	13	11	60%
Castles	9	12	59%
Events	16	13	59%
History/Unesco	10	14	58%
Family	12	15	57%
Travelling by train	18	16	57%
Hiking	17	17	55%
Sustainability	15	18	55%
Nightlife (**)	20	19	53%
Adventure/action	19	20	53%
Shopping	23	21	50%
Active-sports	27	22	49%
Wellness	25	23	49%
Wine	21	24	49%
Luxury	24	25	45%
Industrial heritage	28	26	44%
Countryside	22	27	43%
Remembrance	26	28	43%
Cycling	31	29	43%
Camping	29	30	42%
Film locations	30	31	42%
MTB	32	32	35%
Motorcycling	33	33	32%

(\*) 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	41%
Resting/Relaxation	2	2	36%
Culinary	3	3	33%
Architecture/townscapes	4	4	30%
Nature	5	5	30%
Luxury	9	6	29%
Culture	6	7	29%
Castles	7	8	29%
Family	8	9	28%
Shopping	10	10	28%
Fun/entertainment	13	11	25%
Nightlife (**)	14	12	21%
History/Unesco	12	13	21%
Events	23	14	20%
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Active-sports	21	16	18%
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Industrial heritage	24	20	17%
Countryside	17	21	16%
Camping	19	22	16%
Sustainability	18	23	16%
Cycling	20	24	16%
Adventure/action	22	25	15%
MTB	25	26	13%

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

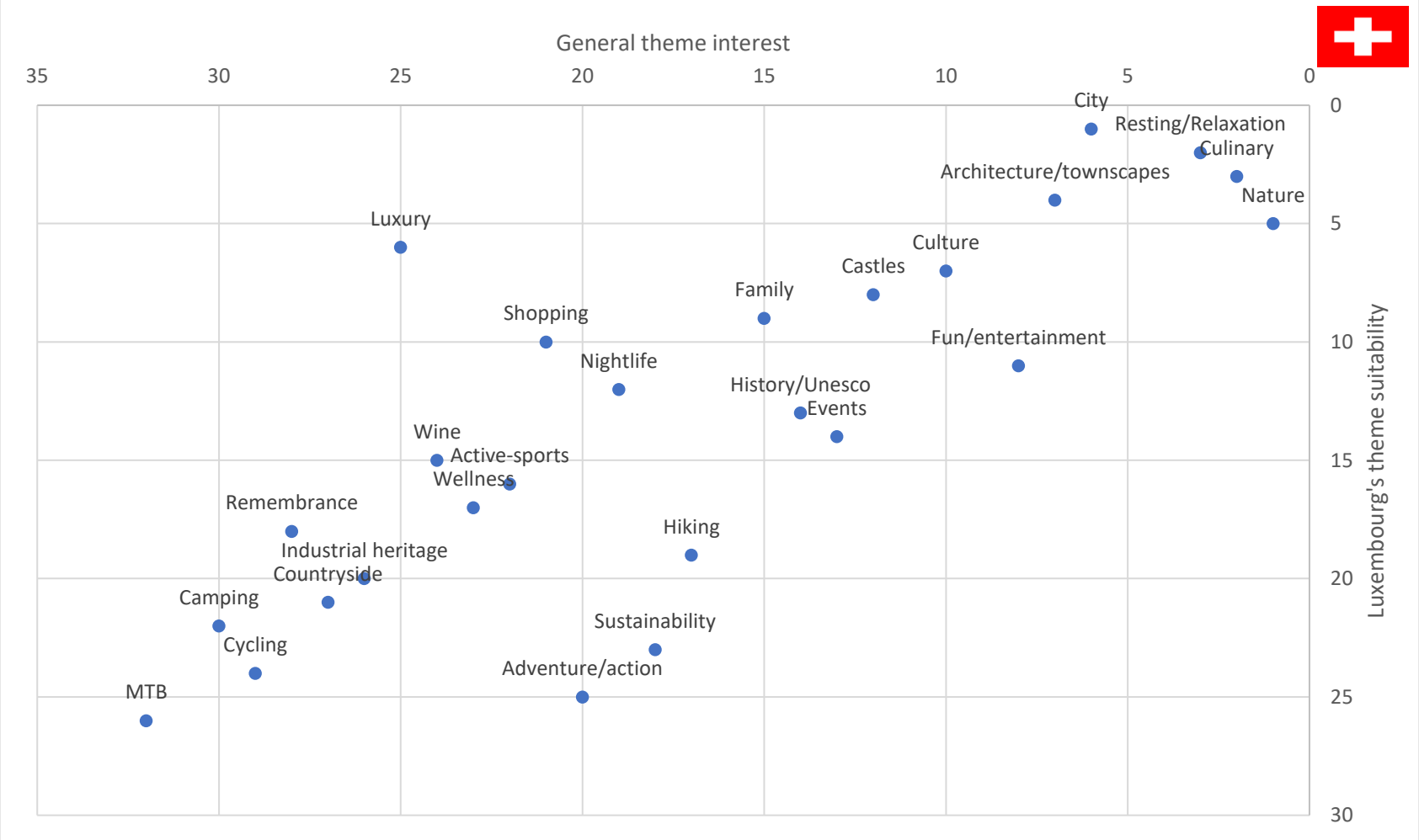
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

(\*\*) 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	43%
clean	2	2	41%
of high quality	3	3	36%
open-minded, tolerant, international	6	4	30%
authentic, real	5	5	30%
welcoming, hospitable	4	6	30%
exclusive, luxurious	8	7	28%
attractive, appealing	7	8	25%
dynamic, modern	9	9	23%
service oriented	10	10	21%
varied, diversified	12	11	21%
surprising	11	12	21%
lively, trendy	13	13	20%
not overcrowded / insider tip	14	14	18%
sustainable	15	15	17%
affordable	16	16	15%

(\*) 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.

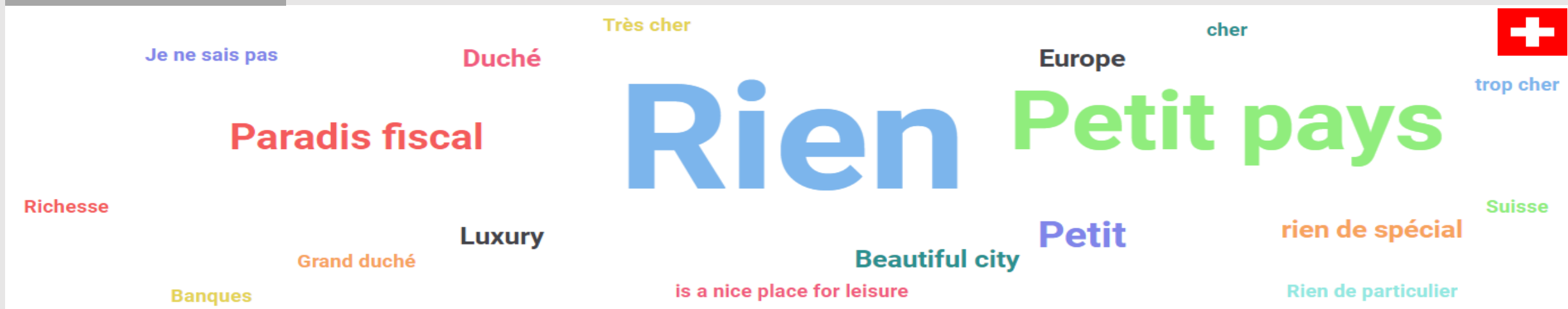
# Spontaneous associations with Luxembourg



## Deutschschweiz



## Romandie



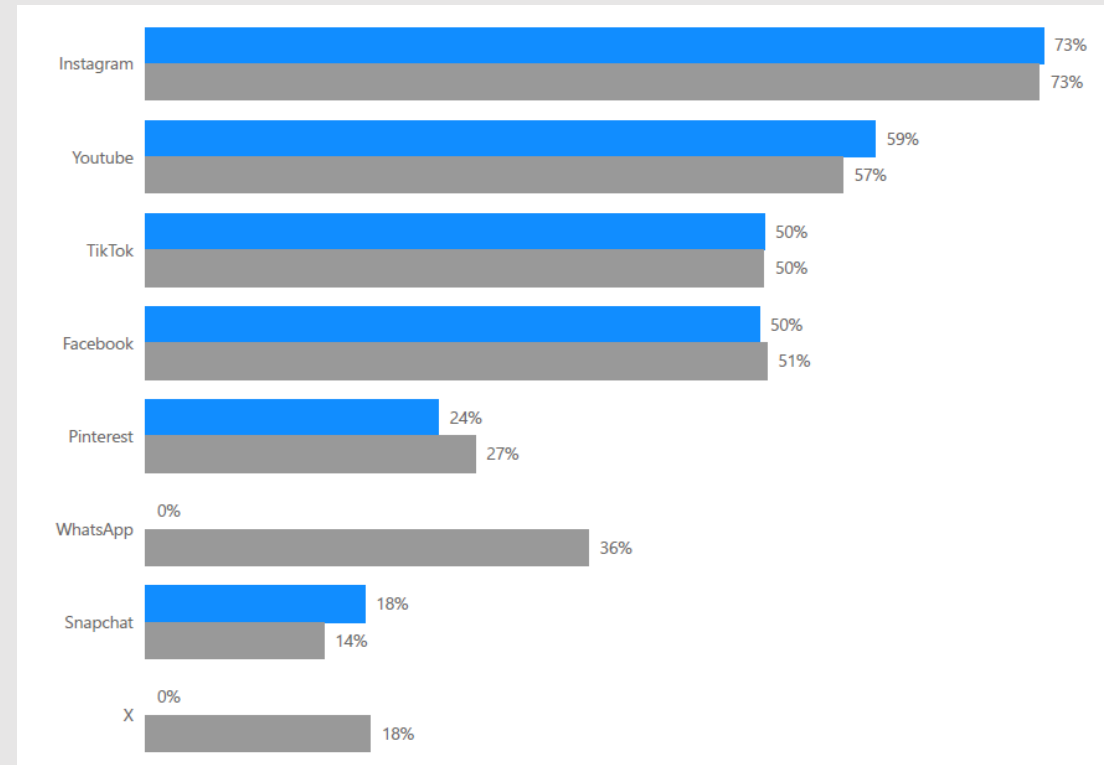
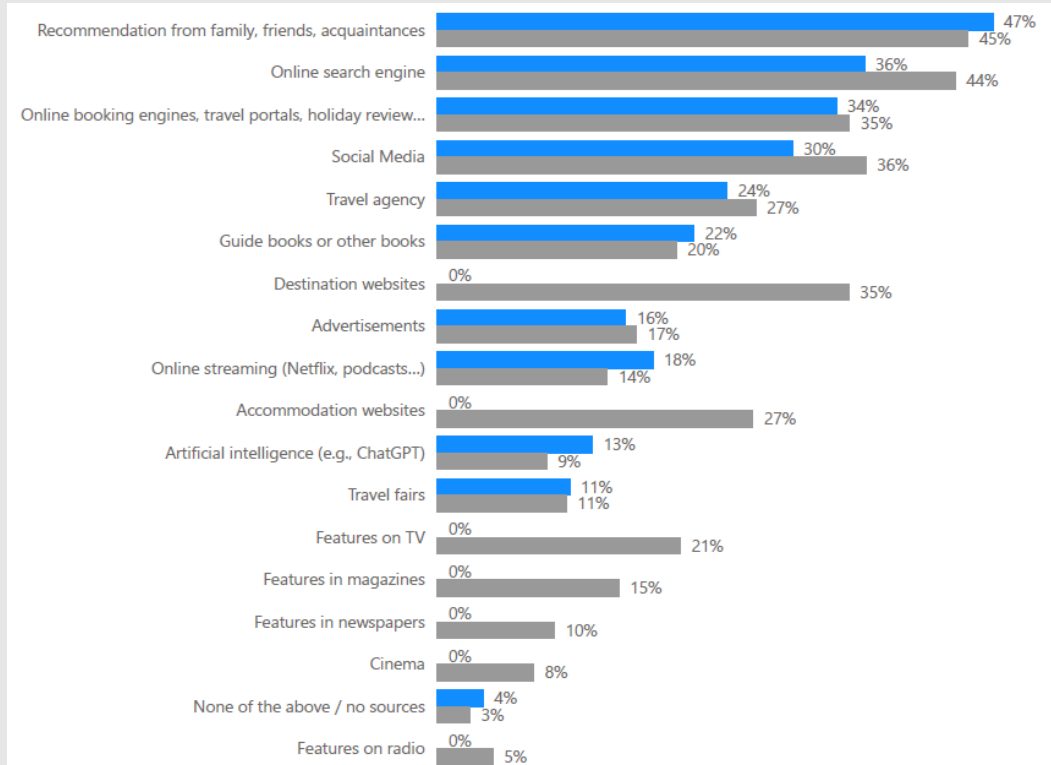
# Trip organisation and preferences (1)

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



Switzerland  
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)

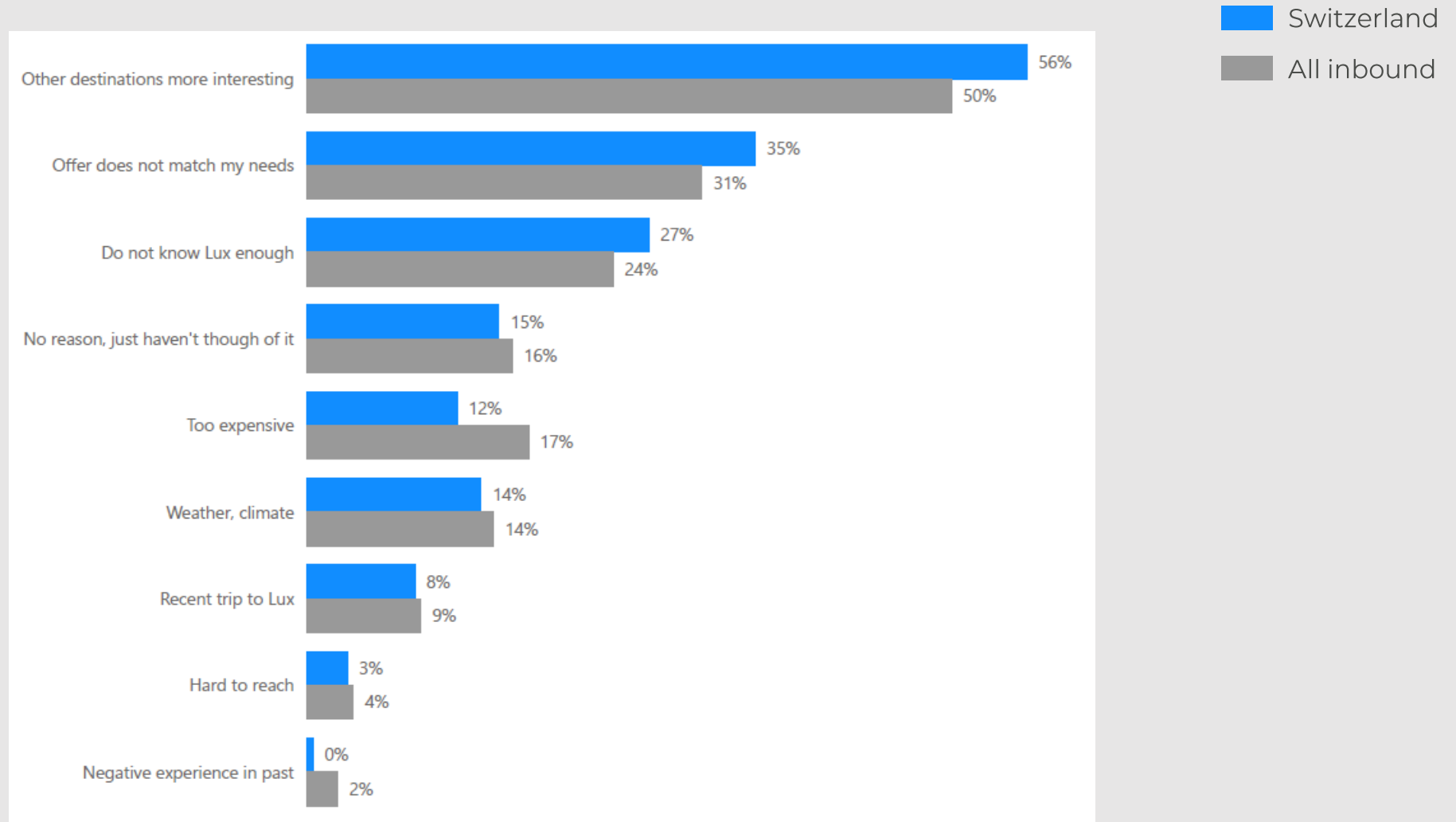


## Trip organisation and preferences (2)

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



### Reasons for not considering Luxembourg as a destination

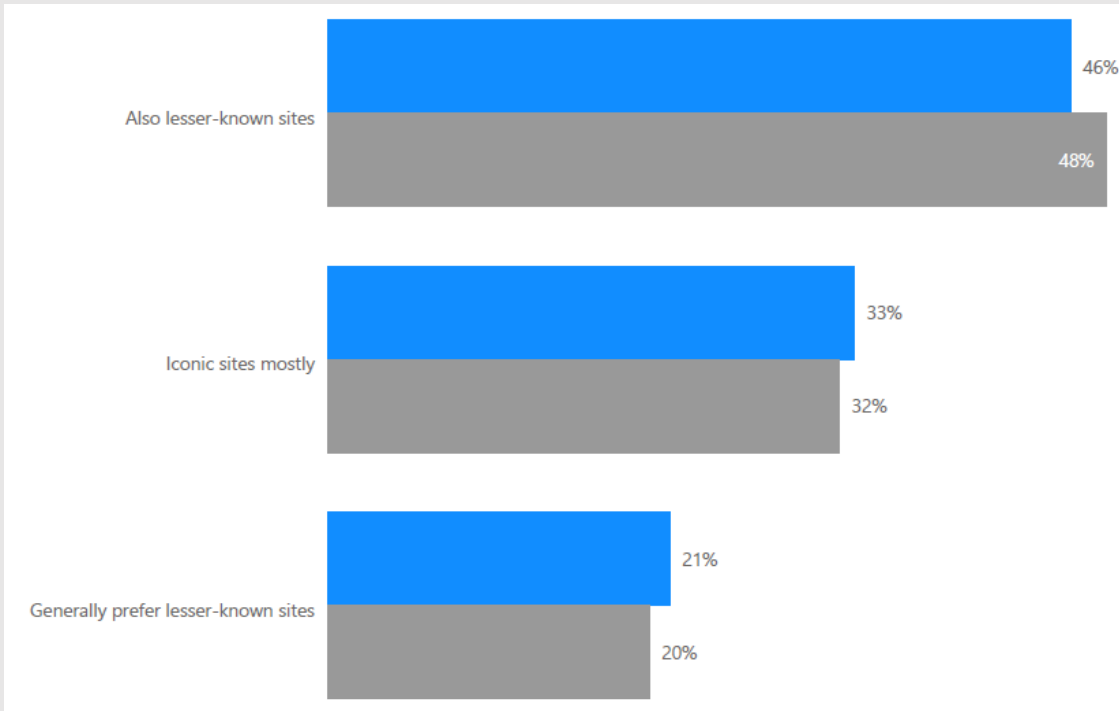


# Trip organisation and preference (3)

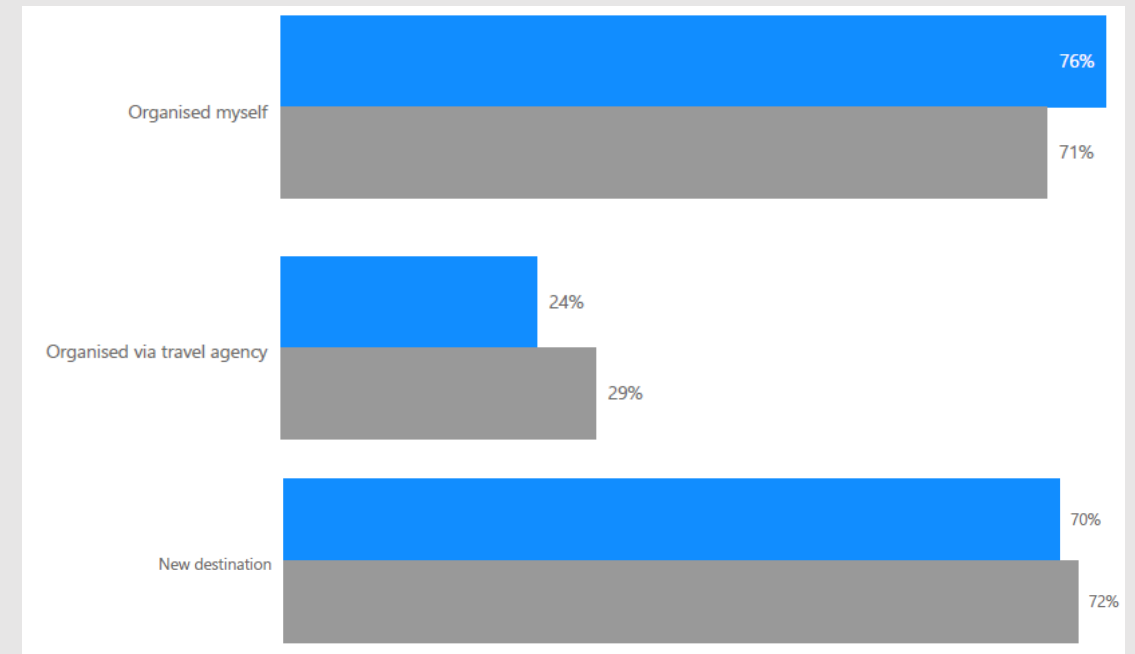
— Average **European source markets**, total vs. Switzerland



## General preference for visiting iconic vs. lesser-known sites



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



Switzerland  
All inbound

(\*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



# Your contact



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