



Luxembourg for Tourism

Market profile

AUSTRIA

2022



# **Economic indicators & General Travel Demand**

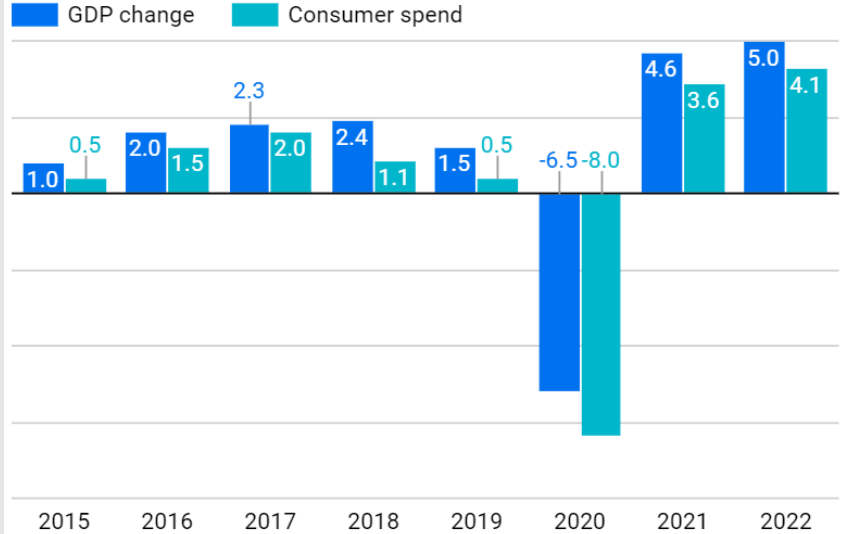
# Economic indicators – General travel demand



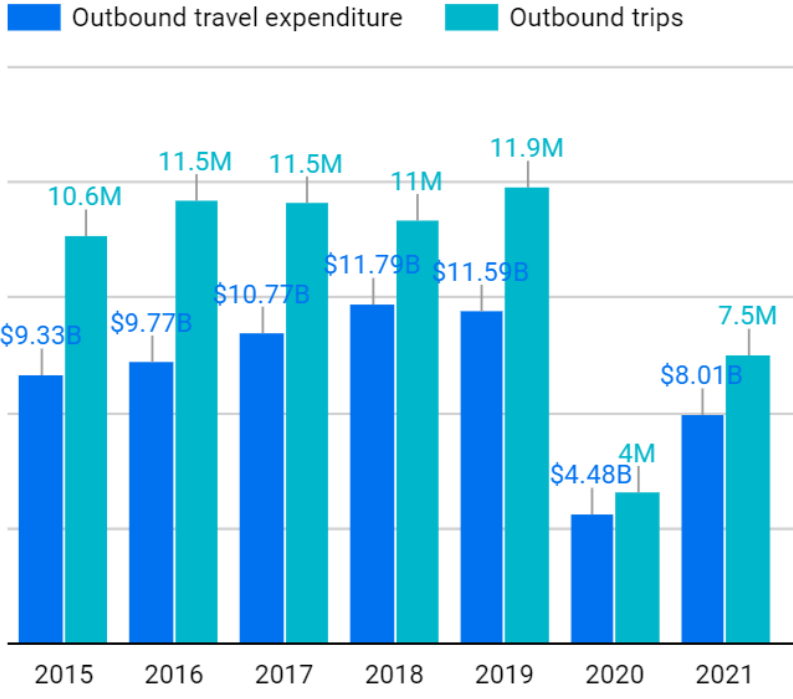
## Economy & population

GDP (PPP) per capita    Unemployment (%)    Population (mn)    Inflation (%)  
**\$55,515**                    **5.5**                    **9.0**                    **8.5**

### GDP and Consumer spending, % annual change



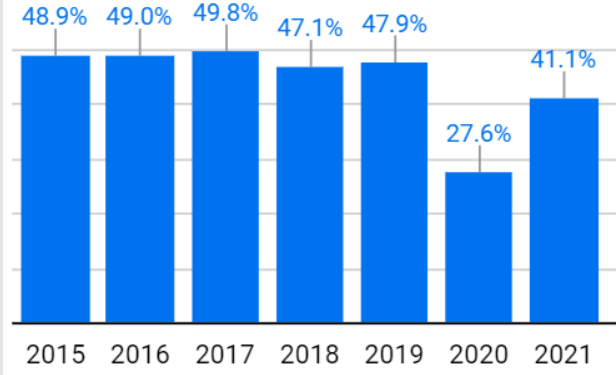
## Outbound trips and travel expenditure



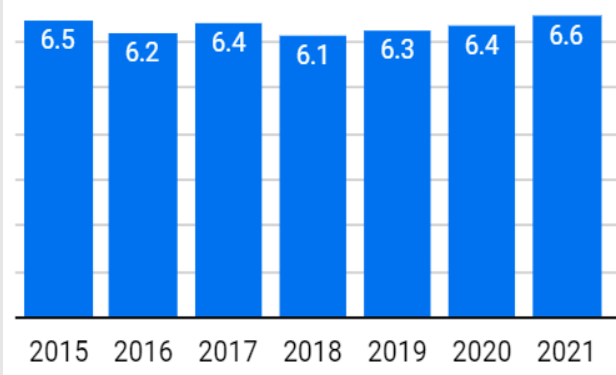
**Average spend per outbound trip (2019)**  
**974 \$**

**Outbound travel intensity**  
**1.34 trips per inhabitant (2019)**

## Share of outbound travel, % all trips



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



**Share of leisure, % all outbound trips (2019)**  
**84.7%**



# **Arrivals & nights in paid accommodation in Luxembourg**

# Nights, arrivals & length of stay in paid accommodation 2022



**Nights,  
paid accommodation, 2022**



**+69%** (vs. 2021)  
**+0%** (vs. 2019)

**Arrivals,  
paid accommodation, 2022**



**+91%** (vs. 2021)  
**-3%** (vs. 2019)

**Average length of stay,  
paid accommodation, 2022**



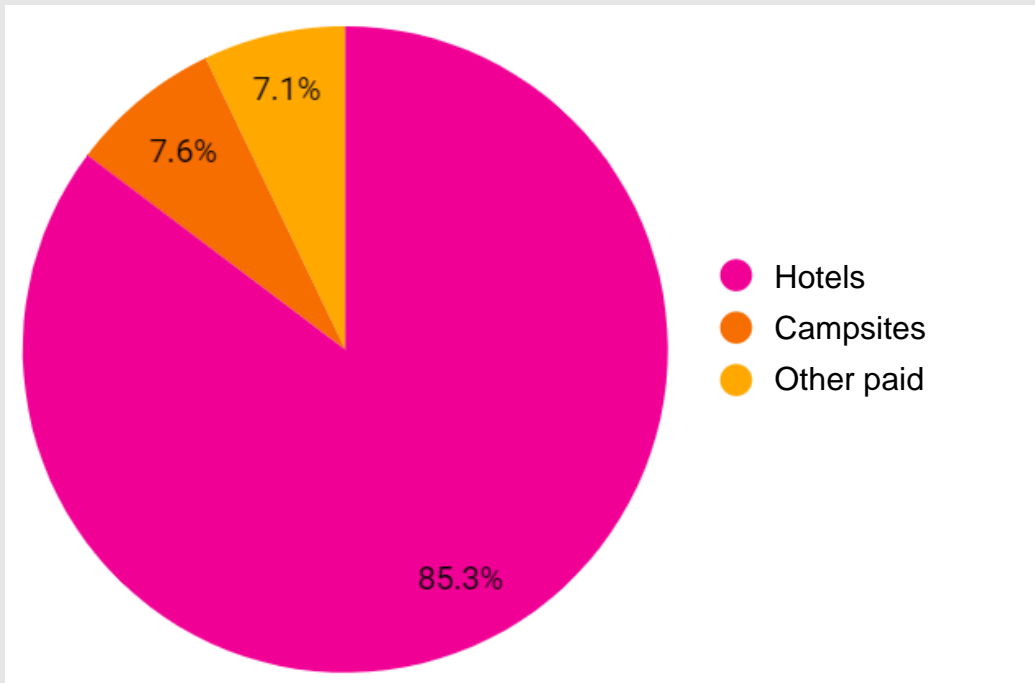
**-0.27 days** (vs. 2021)  
**+0.06 days** (vs. 2019)

# Nights & arrivals in paid accommodation

## Type of accommodation, 2022

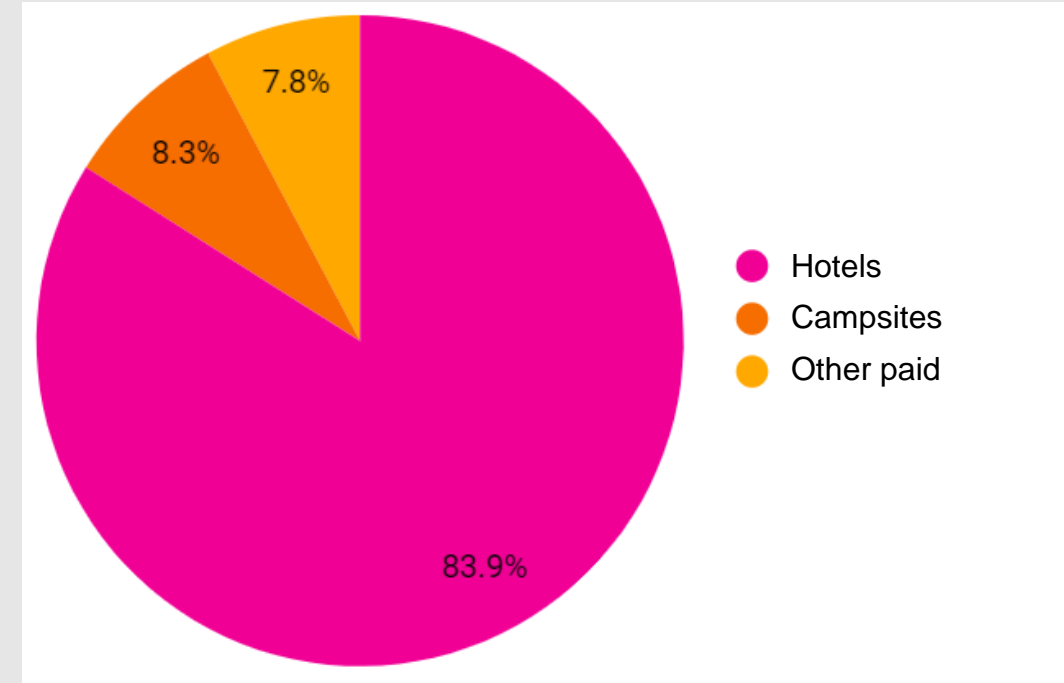


### Nights, paid accommodation



<b>Hotels</b>	<b>10.960</b>	<b>-7%</b> (vs. 2019)
<b>Campsites</b>	<b>978</b>	<b>+184%</b> (vs. 2019)
<b>Other paid</b>	<b>917</b>	<b>+32%</b> (vs. 2019)

### Arrivals, paid accommodation



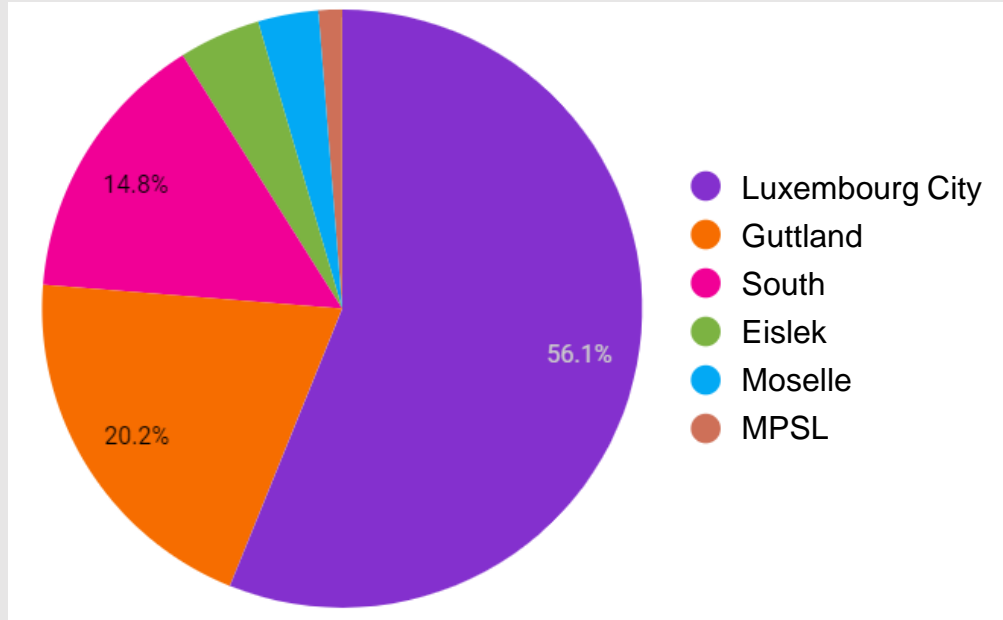
<b>Hotels</b>	<b>5.155</b>	<b>-12%</b> (vs. 2019)
<b>Campsites</b>	<b>509</b>	<b>+217%</b> (vs. 2019)
<b>Other paid</b>	<b>478</b>	<b>+39%</b> (vs. 2019)

# Nights & arrivals in paid accommodation

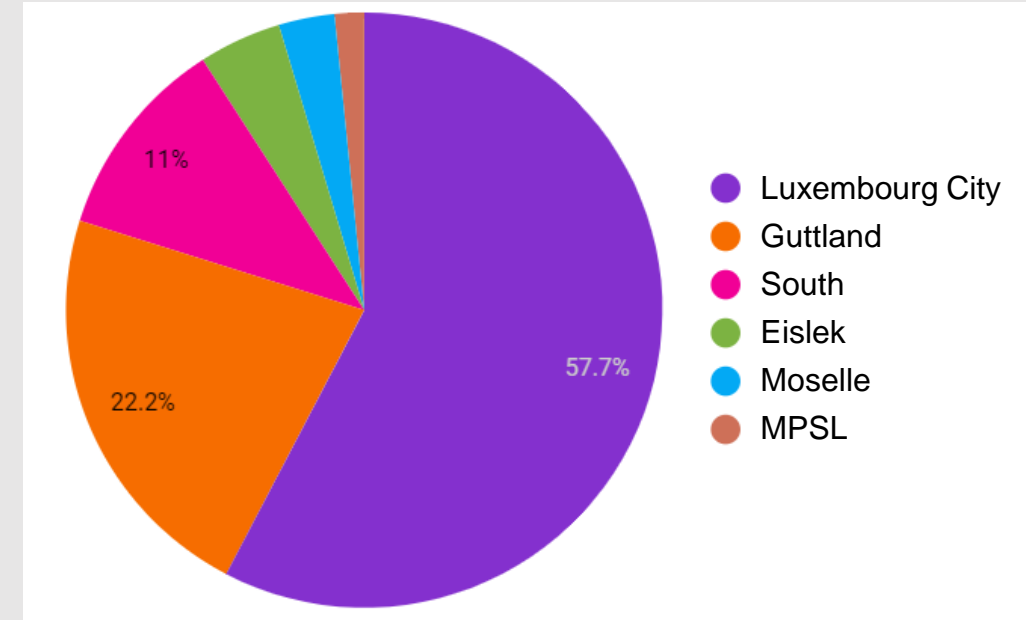
## Regions, 2022



**Nights,  
paid accommodation**



**Arrivals,  
paid accommodation**



<b>Luxembourg City</b>	<b>7.213</b>	<b>-18%</b> (vs. 2019)
<b>Guttland</b>	<b>2.592</b>	<b>+47%</b> (vs. 2019)
<b>South</b>	<b>1.903</b>	<b>+53%</b> (vs. 2019)
<b>Eislek</b>	<b>565</b>	<b>+66%</b> (vs. 2019)
<b>Moselle</b>	<b>419</b>	<b>-11%</b> (vs. 2019)
<b>MPSL</b>	<b>163</b>	<b>-42%</b> (vs. 2019)

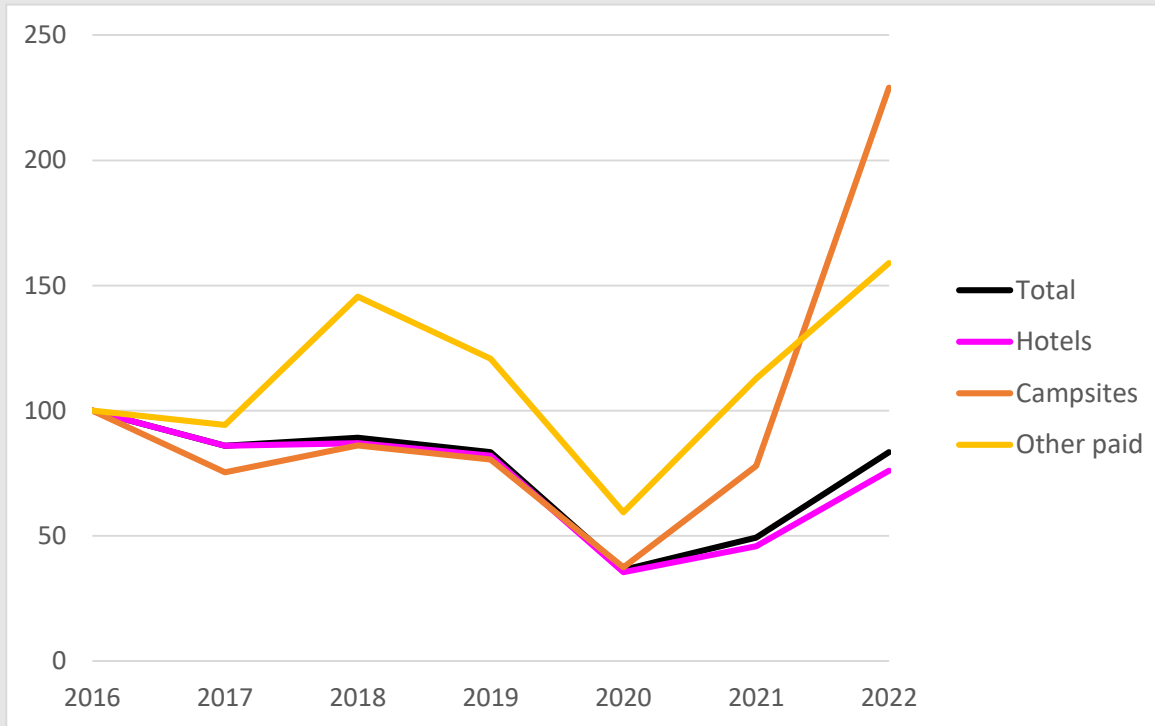
<b>Luxembourg City</b>	<b>3.541</b>	<b>-23%</b> (vs. 2019)
<b>Guttland</b>	<b>1.364</b>	<b>+49%</b> (vs. 2019)
<b>South</b>	<b>678</b>	<b>+51%</b> (vs. 2019)
<b>Eislek</b>	<b>275</b>	<b>+139%</b> (vs. 2019)
<b>Moselle</b>	<b>186</b>	<b>+12%</b> (vs. 2019)
<b>MPSL</b>	<b>98</b>	<b>-6%</b> (vs. 2019)

# Nights in paid accommodation

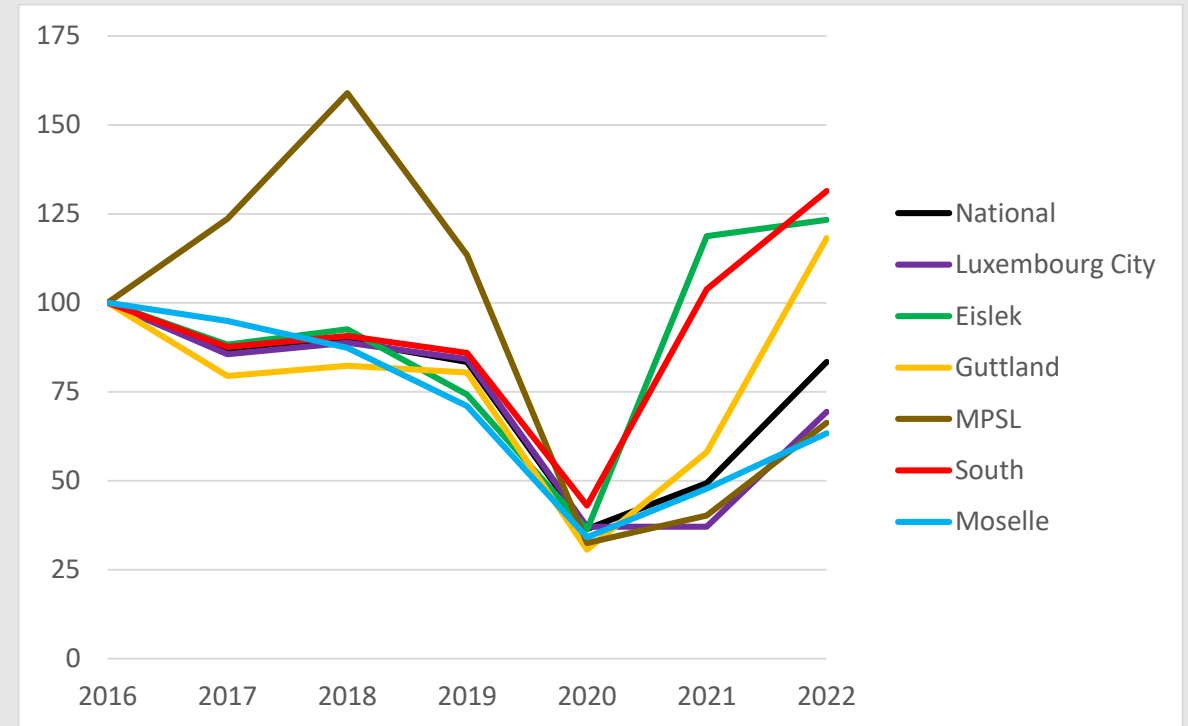
Total, Type of accommodation & Regions : Trends 2016-2022



2016 = Index 100



2016 = Index 100



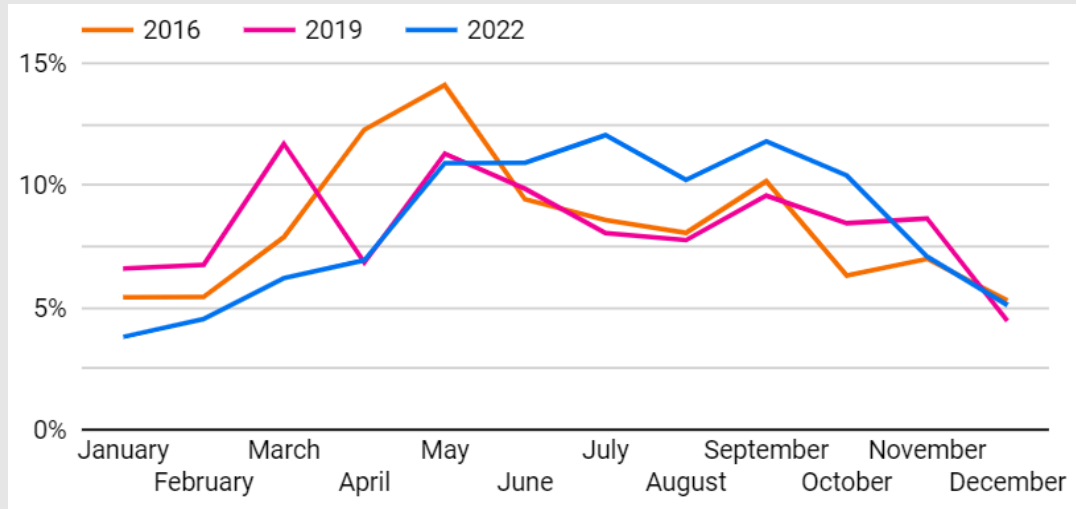


# Nights in paid accommodation

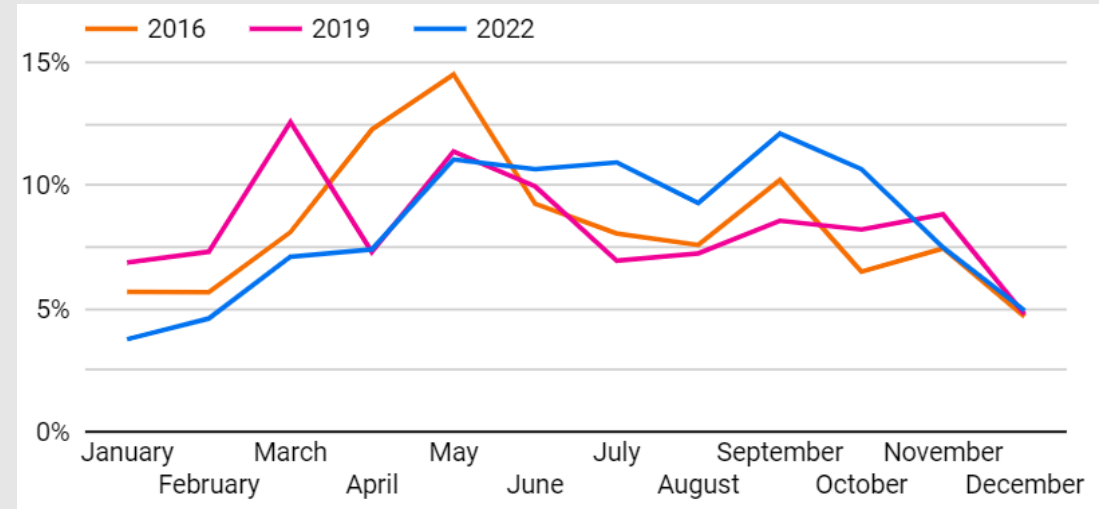
## Seasonality



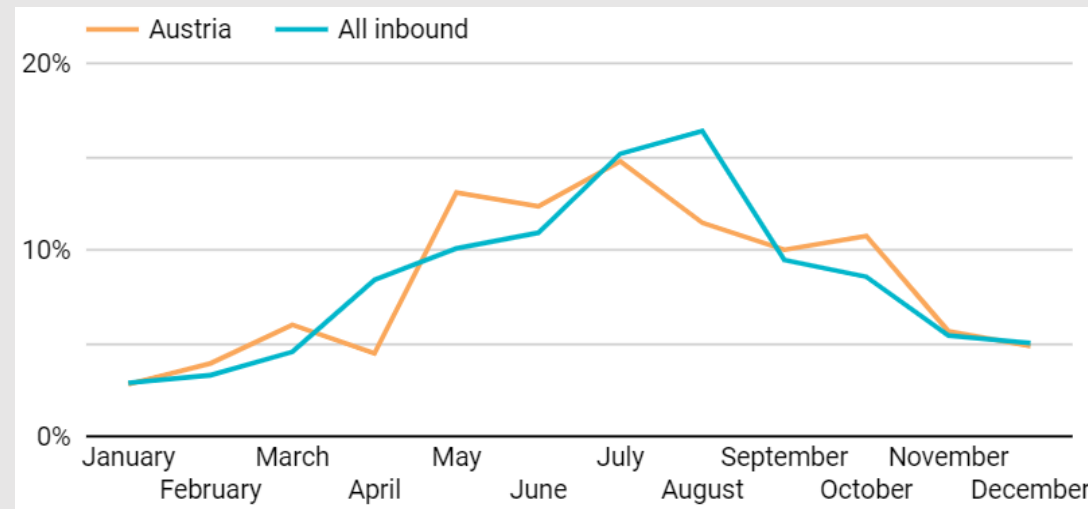
### Austrian nights, all paid accommodation



### Austrian nights, hotels



### Nights, all paid accommodation, 2022



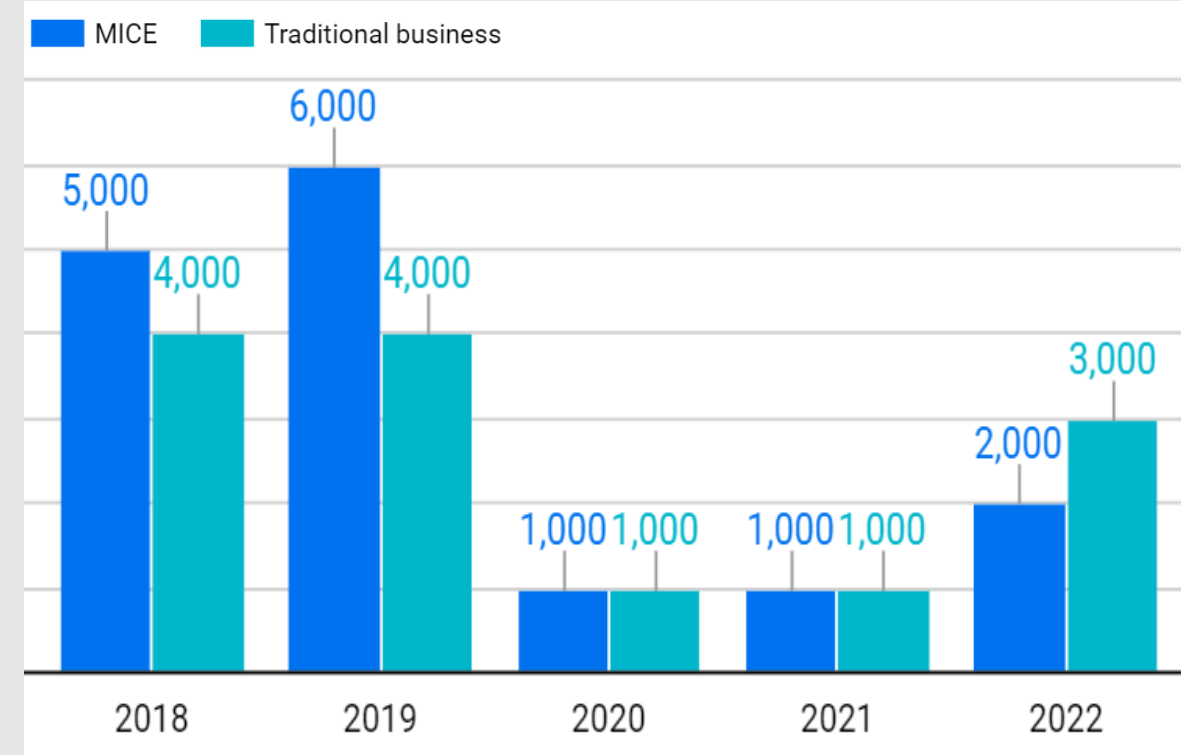
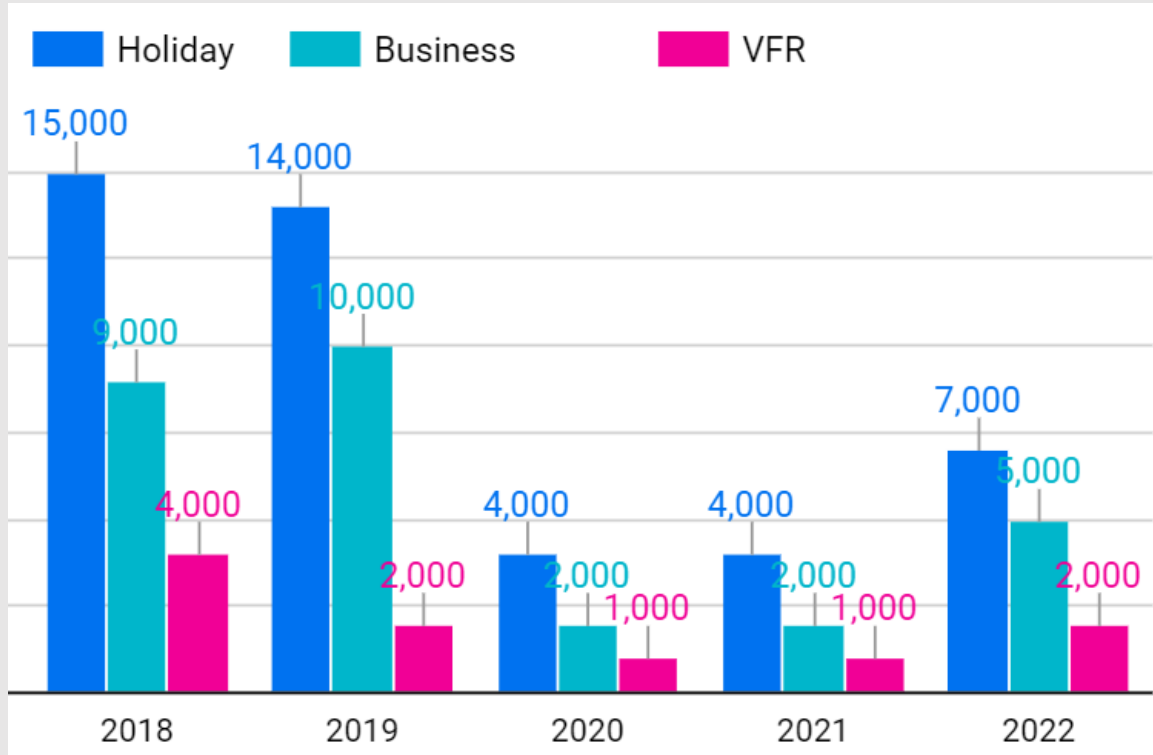


# **Characteristics of Austrian inbound trips to Luxembourg**

# Austrian trips to Luxembourg with overnight (all accommodation)



## Purpose of visit, 2018-2022

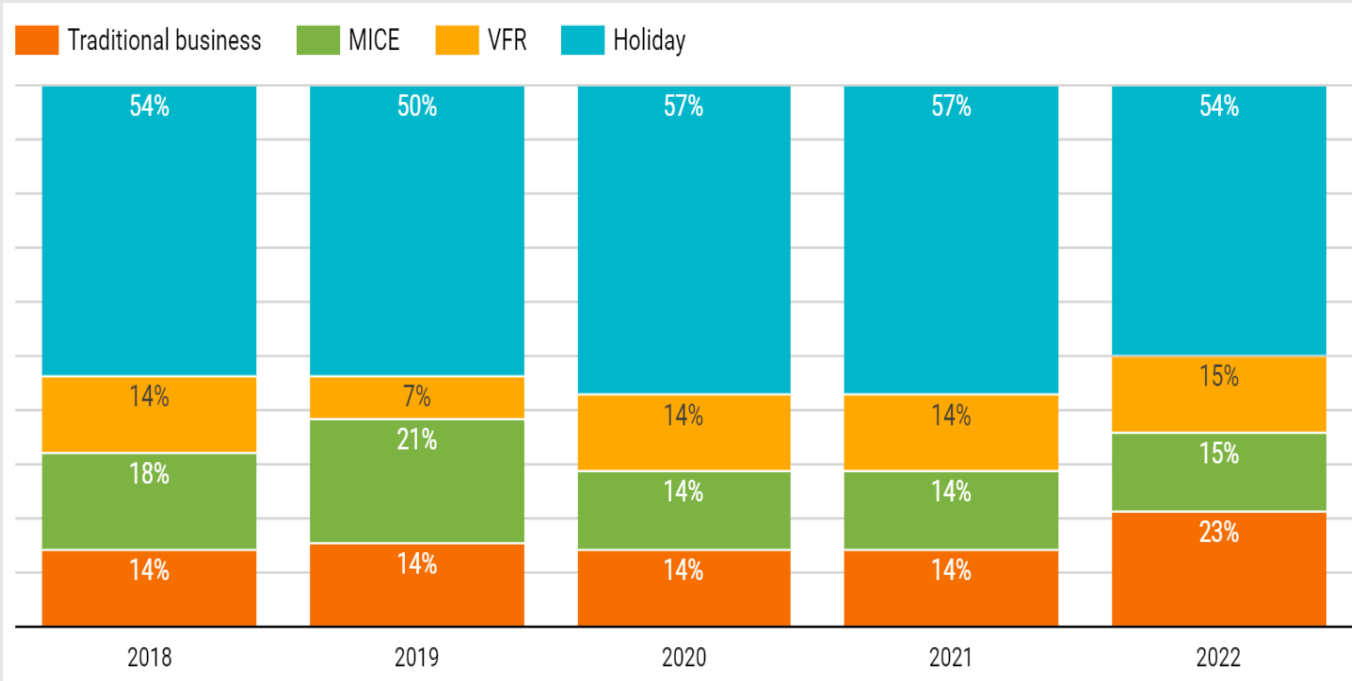


# Austrian trips to Luxembourg with overnight (all accommodation)



## Purpose of visit, 2016-2022

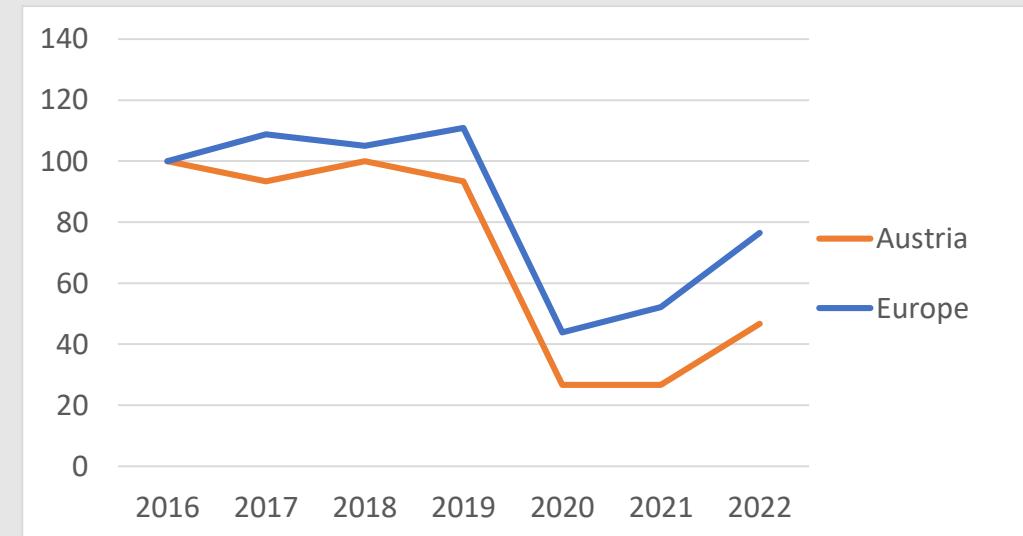
Austrian trips to Luxembourg, 2018-2022



2022

	Austria to Luxembourg	Europe to Luxembourg
Holiday	54%	63%
VFR	15%	17%
MICE	15%	12%
Traditional Business	23%	8%

Austrian & European holiday trips to Luxembourg, 2016 = index 100



# Austrian same-day trips to Luxembourg

## 2022



### Number of Austrian same-day trips to Luxembourg

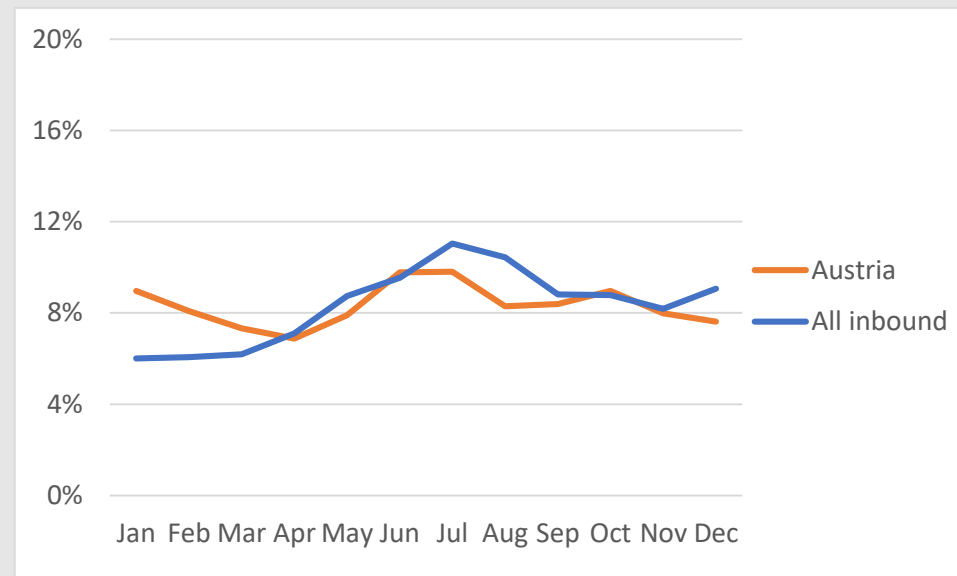
**36.000**  
(1%  
of inbound  
same-day trips  
to  
Luxembourg)

**-7% (vs. 2021)**

### Average length of same-day trips

**7,6 h**  
(All  
inbound  
7,3h)

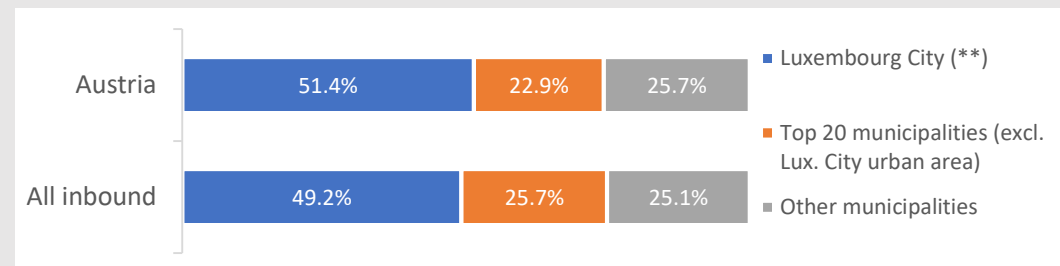
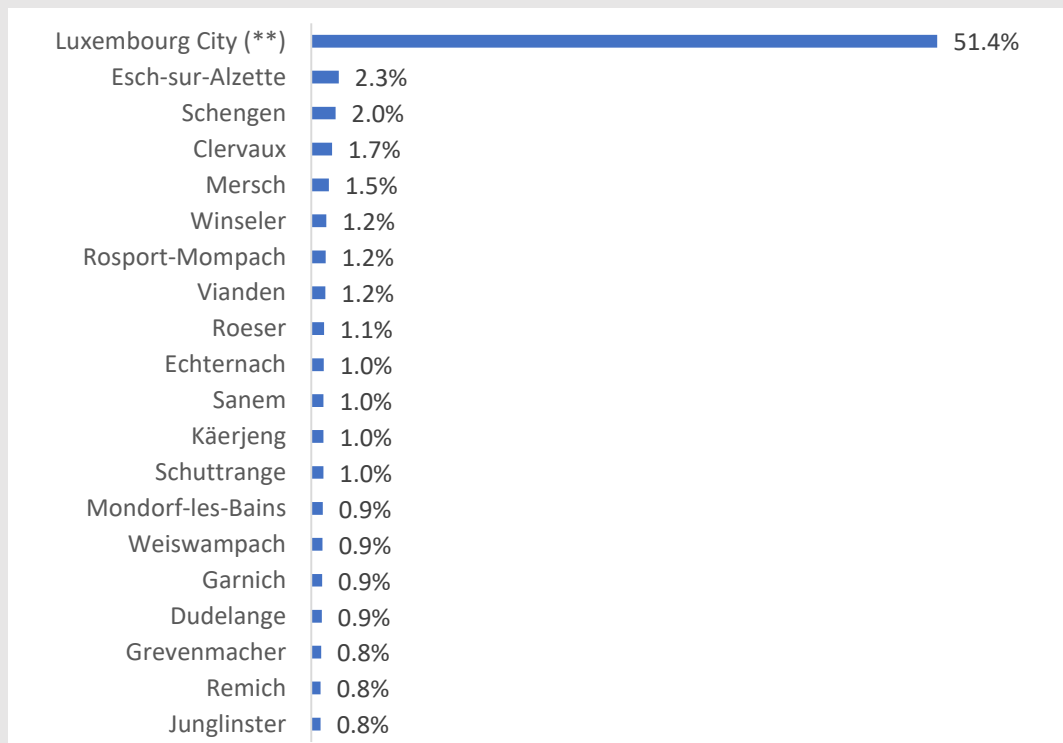
### Seasonality of same-day trips, % monthly share



# Cities visited in Luxembourg



## Top cities visited during Austrian overnight and same-day trips (\*), 2022



Source: Mobile phone data (Editus/LFT).

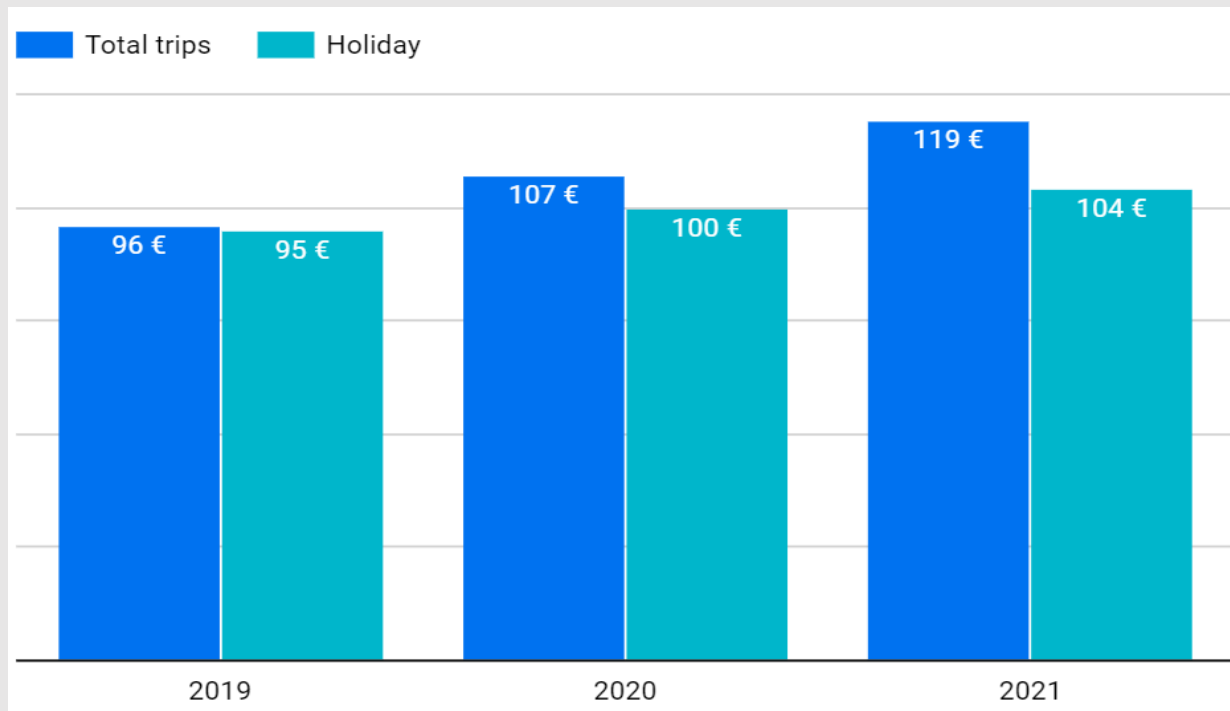
(\*) Overnight trips : includes city where night is spent. Includes all cities with at least 1 h of visit. (\*\*) Urban area (= incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange).

# Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

## Austrian trips to Luxembourg : average spend per pers. per day



2021

Austria to  
Luxembourg

Europe to  
Luxembourg

Spend/day/pers. on **all** trips

119 €

104 €

Spend/day/pers. on **holiday** trips

104 €

97 €

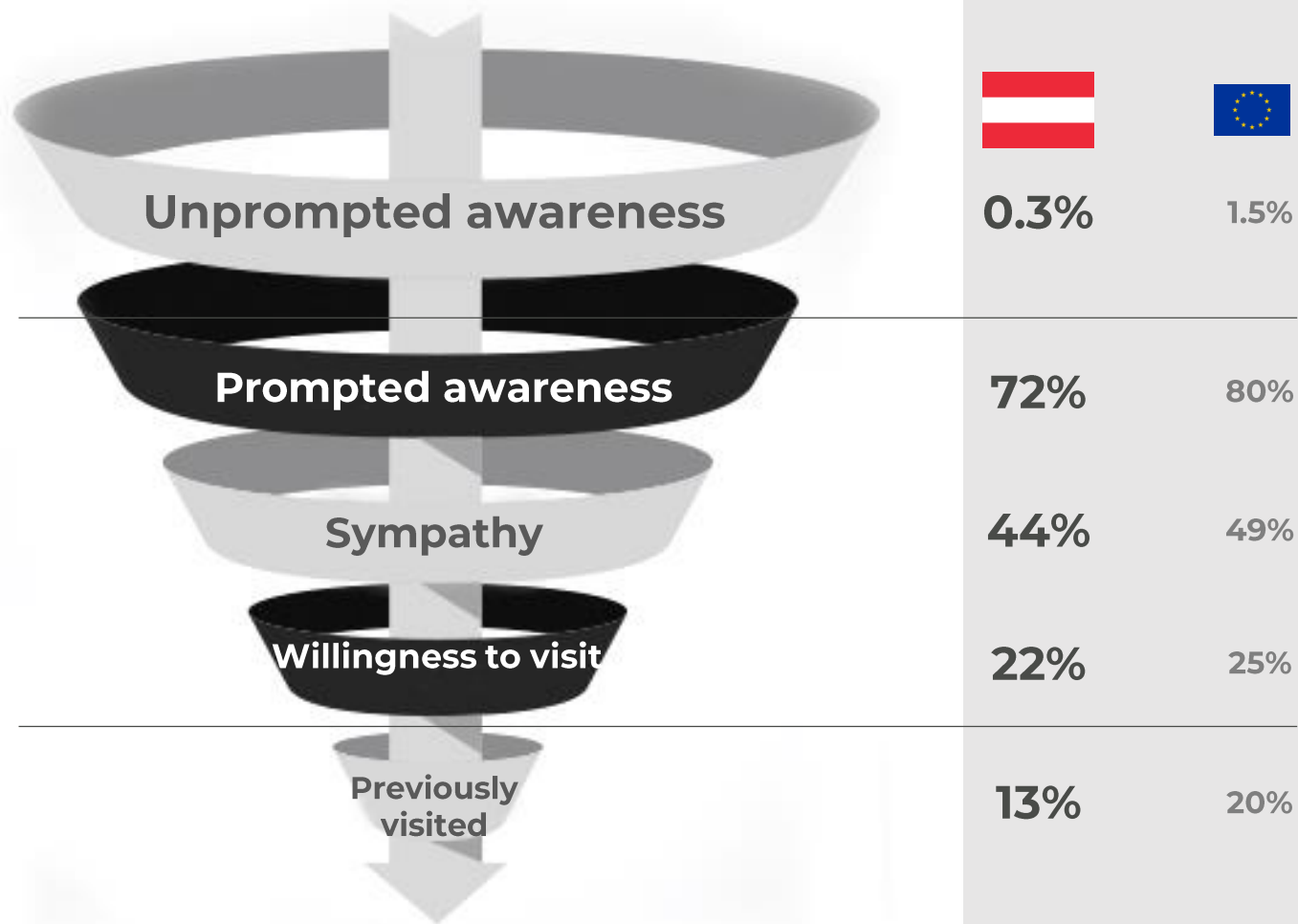


# **Target segments, Brand & Growth Potential**



# Brand Funnel 2021

Assessing Luxembourg's brand strength as a destination



## Total future visitor potential from Austria (\*)

1.5 million

## Highest future travel intent from Austria (\*\*)

1. Explorers
2. Perfection Seekers
3. Nature-Loving Actives

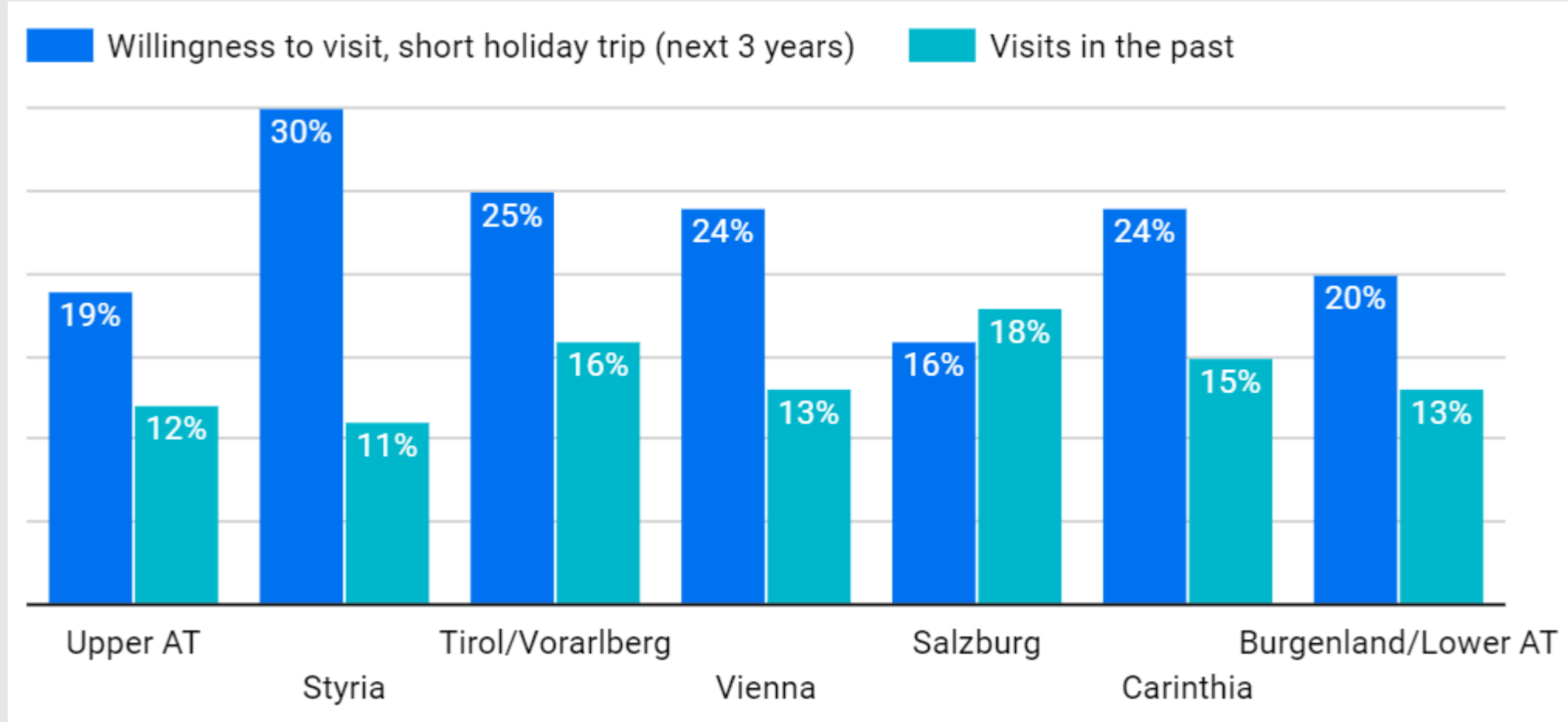
Source: Destination Brand/Inspektour.

(\*) Based on travel intent for next 3 years.

(\*\*) Based on relative shares of travel intent for next 3 years.




# Regional origin 2021

## Past visitors and future potential



# General theme interest (\*)






Theme			
	Rank	Rank	% interested
<b>Resting/Relaxation</b>	1	<b>1</b>	75%
<b>Nature</b>	3	<b>2</b>	69%
<b>Culinary</b>	2	<b>3</b>	69%
<b>City</b>	4	<b>4</b>	66%
<b>Wellness</b>	13	<b>5</b>	56%
<b>Castles</b>	5	<b>6</b>	50%
<b>Culture</b>	6	<b>7</b>	49%
<b>Hiking</b>	8	<b>8</b>	47%
<b>Shopping</b>	10	<b>9</b>	42%
<b>Nightlife (**)</b>	12	<b>10</b>	42%
<b>History/Unesco</b>	7	<b>11</b>	39%
<b>Active-sports</b>	16	<b>12</b>	38%
<b>Events</b>	14	<b>13</b>	35%
<b>Countryside</b>	15	<b>14</b>	35%
<b>Sustainability</b>	9	<b>15</b>	34%
<b>Cycling</b>	18	<b>16</b>	29%
<b>Family</b>	11	<b>17</b>	28%
<b>MTB</b>	19	<b>18</b>	17%
<b>Industrial heritage</b>	17	<b>19</b>	16%
<b>Motorcycling</b>	20	<b>20</b>	15%

(\*) 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	<b>1</b>	42%
Culture	3	<b>2</b>	36%
Culinary	5	<b>3</b>	34%
Castles	2	<b>4</b>	33%
Shopping	4	<b>5</b>	32%
Nature	6	<b>6</b>	26%
Cycling	8	<b>7</b>	23%
Hiking	7	<b>8</b>	23%
Active-sports	10	<b>9</b>	22%
Family	9	<b>10</b>	20%

## Growth potential for themes (\*\*)

- Nature
- Hiking
- Culinary

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




(\*\*) Themes for which Luxembourg's theme suitability is still relatively low, compared to the overall general theme interest.

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 Brand Value Ratings (\*)



Feature			
	Rank	Rank	% agreeing
<b>Attractive, appealing</b>	4	1	32%
<b>Open-minded, tolerant</b>	3	2	32%
<b>Authentic</b>	1	3	31%
<b>Welcoming, hospitable</b>	2	4	29%
<b>Lot of variety, diversified</b>	6	5	28%
<b>Lively, hip</b>	9	6	26%
<b>Surprising</b>	5	7	25%
<b>Not crowded, insider tip</b>	8	8	24%
<b>Service-oriented</b>	7	9	23%
<b>Sustainable</b>	10	10	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.

# Spontaneous associations with Luxembourg



# LFT strategic market focus

## Market prioritisation



Market Priority	Main Objective	Target Segment focus (in decreasing order of importance within category)
		<b>Bold : main focus</b>
4	Image	Image: PS. Activating: <b>EXP.</b>

### Theme & segment focus

Theme	Priority	Marketing	Segments
City	1	Activating	EXP, (PS)
Castles	2	Image	EXP, PS
Culture	2	Image	EXP
Cycling	3	Image	PS, EXP

### Brand Value focus

Theme	Priority	Segments
Service-oriented	1	PS
Not crowded/insider tip	2	
Lot of variety	3	



## Your contact



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