Luxembourg for Tourism

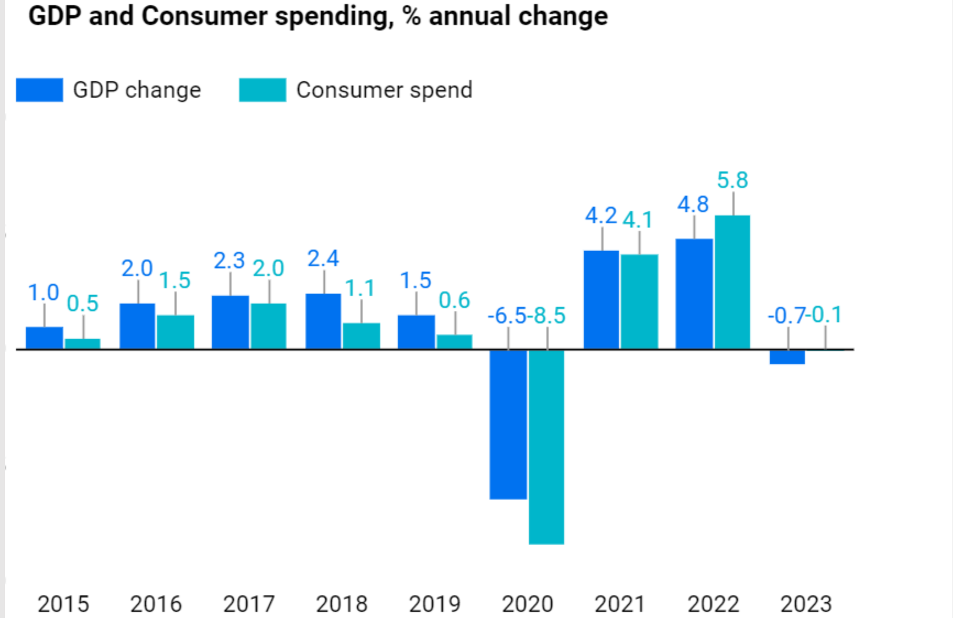
Market profile AUSTRIA 2023

Economic indicators & General Travel Demand

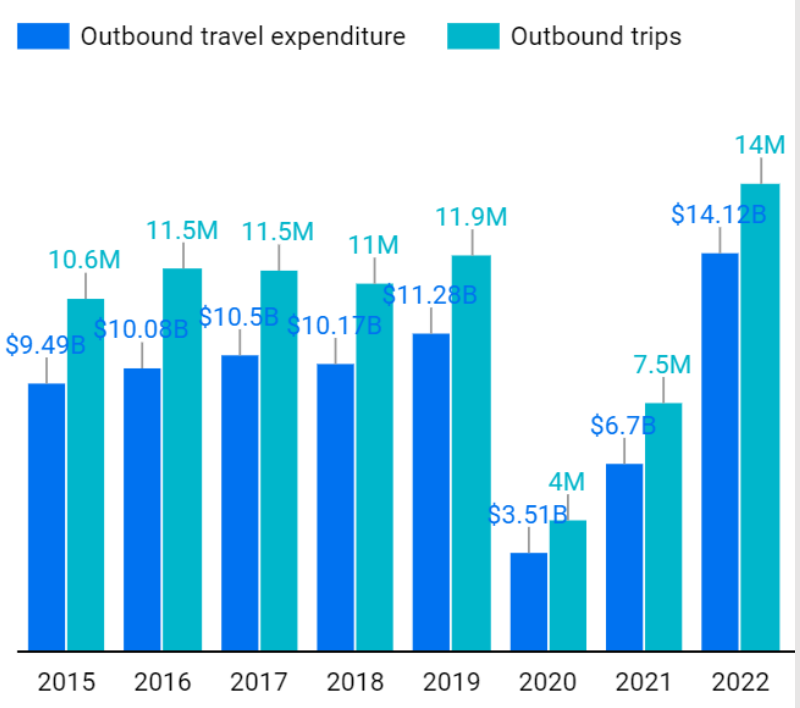
Economic indicators - General travel demand

Economy & population

GDP ($) per capita	Unemployment (%)	Population (mn)	Inflation (%)
57,081	5.1	9.1	7.7

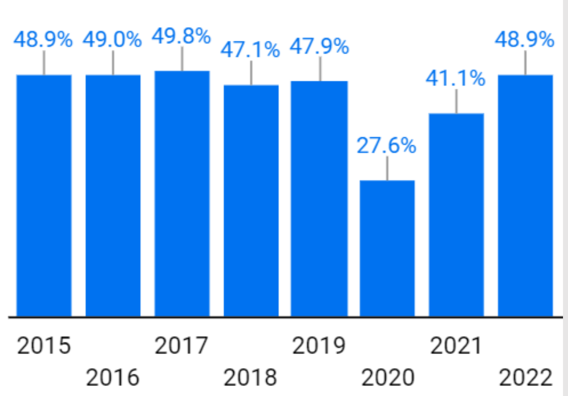


Outbound trips and travel expenditure

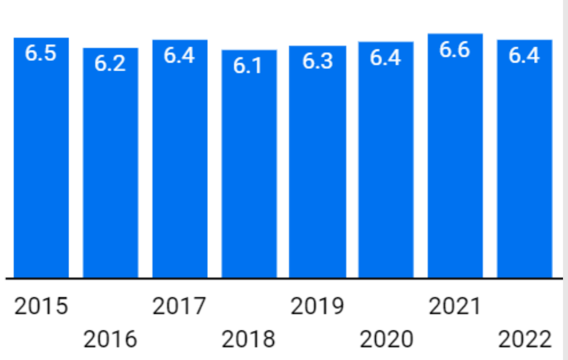


Average spend per outbound trip (2019)
948 $

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of short trips (1-3 nights), % all outbound trips (2022)
39.5%

Outbound travel intensity
1.34 trips
per inhabitant (2019)

Share of leisure, % all outbound trips (2022)
87.8%

Sources: Eurostat, IMF.

Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation

2023

**Nights,
paid accommodation, 2023**

13,780

+3% (vs. 2022)
+7% (vs. 2019)

**Arrivals,
paid accommodation, 2023**

6,784

+11% (vs. 2022)
+10% (vs. 2019)

**Average length of stay,
paid accommodation, 2023**

2.03 days

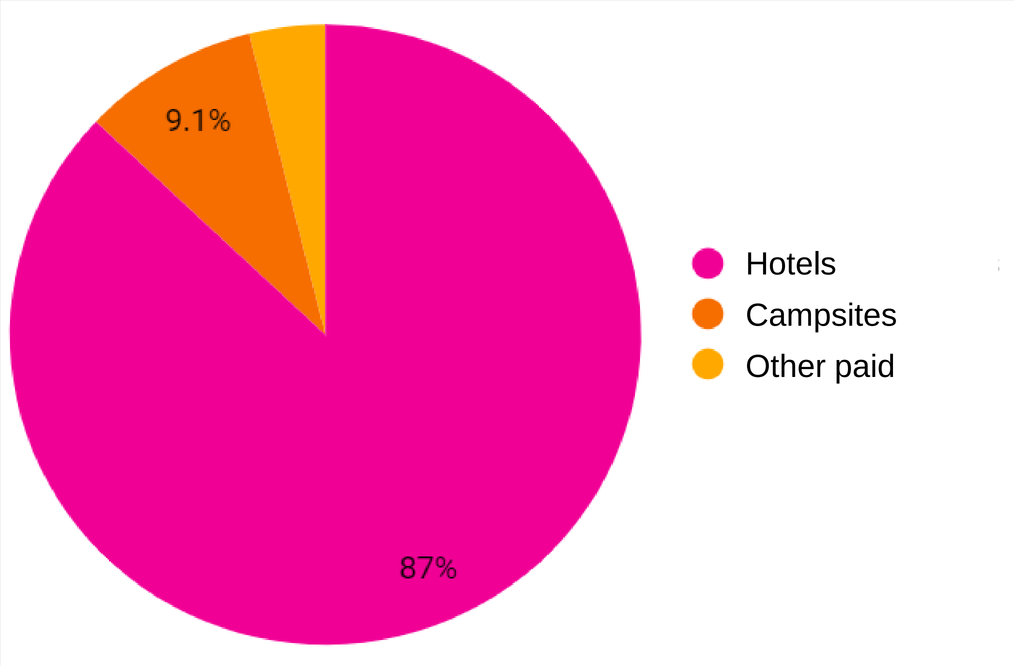
-0.16 days (vs. 2022)
-0.06 days (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

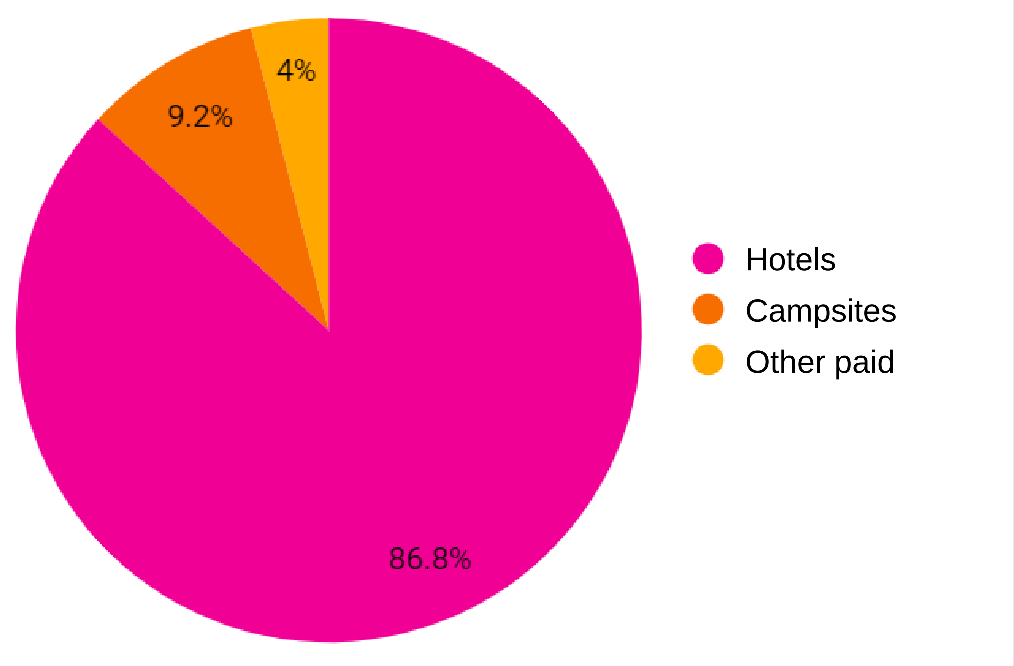
Type of accommodation, 2023

Nights, paid accommodation, 2023



Hotels	**11.995**	+5% (vs. 2022)	+5% (vs. 2019)
Campsites	**1.249**	+22% (vs. 2022)	+75% (vs. 2019)
Other paid accomm.	**536**	-43% (vs. 2022)	-25% (vs. 2019)

Arrivals, paid accommodation, 2023



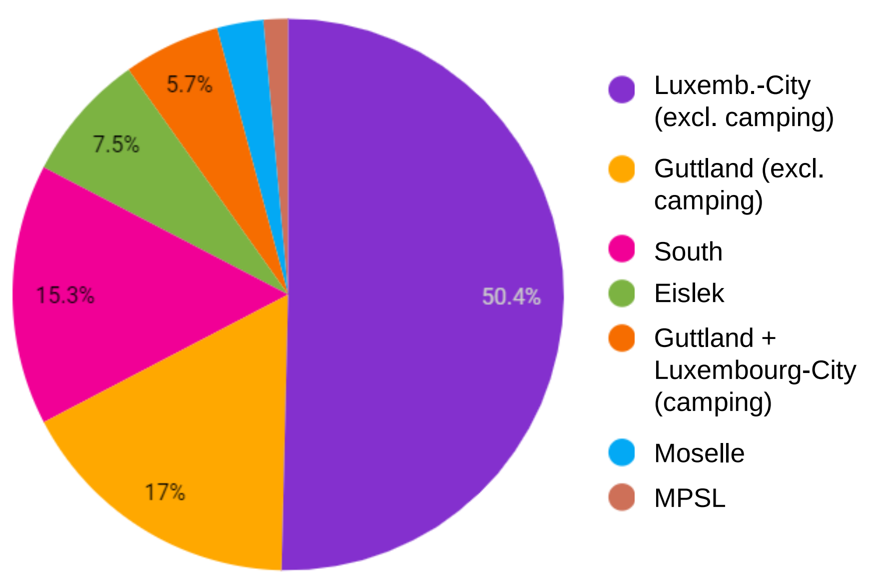
Hotels	**5.889**	+13% (vs. 2022)	+9% (vs. 2019)
Campsites	**623**	+19% (vs. 2022)	+58% (vs. 2019)
Other paid accomm.	**272**	-21% (vs. 2022)	-27% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

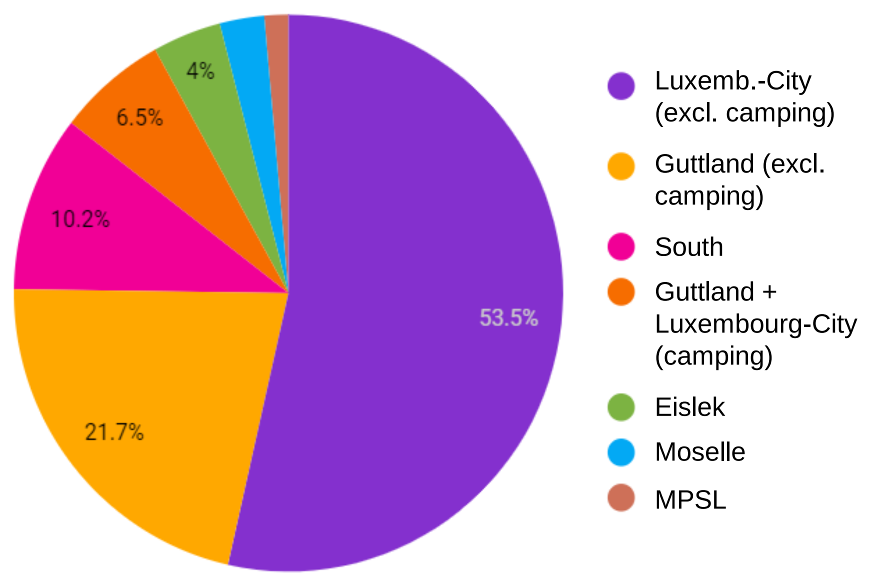
Regions, 2023

Nights, paid accommodation, 2023



Lux.-City (excl. camping)	6.943	-2% (vs. 2022)	+2% (vs. 2019)
Guttland (excl. camping)	2.337	-0% (vs. 2022)	+22% (vs. 2019)
South	2.107	+1% (vs. 2022)	-5% (vs. 2019)
Eislek	1.038	+79% (vs. 2022)	+30% (vs. 2019)
Guttland/Lux.-City (camping)	782	+25% (vs. 2022)	+97% (vs. 2019)
Moselle	374	-12% (vs. 2022)	-23% (vs. 2019)
MPSL	199	-2% (vs. 2022)	-25% (vs. 2019)

Arrivals, paid accommodation, 2023



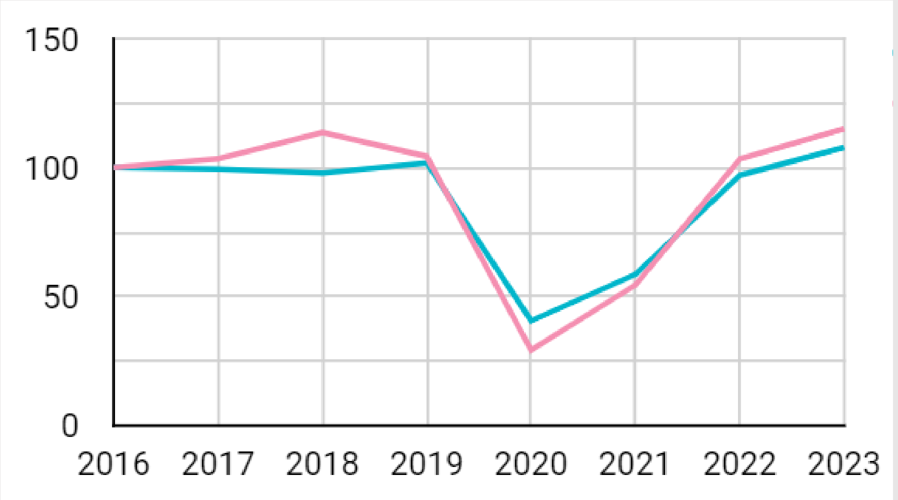
Lux.-City (excl. camping	3.632	+7% (vs. 2022)	+4% (vs. 2019)
Guttland (excl. camping)	1.471	+38% (vs. 2022)	+63% (vs. 2019)
South	695	-3% (vs. 2022)	-16% (vs. 2019)
Guttland/Lux.-City (camping)	438	+20% (vs. 2022)	+56% (vs. 2019)
Eislek	274	+10% (vs. 2022)	-16% (vs. 2019)
Moselle	178	-4% (vs. 2022)	-16% (vs. 2019)
MPSL	96	-2% (vs. 2022)	-21% (vs. 2019)

Source: Statec

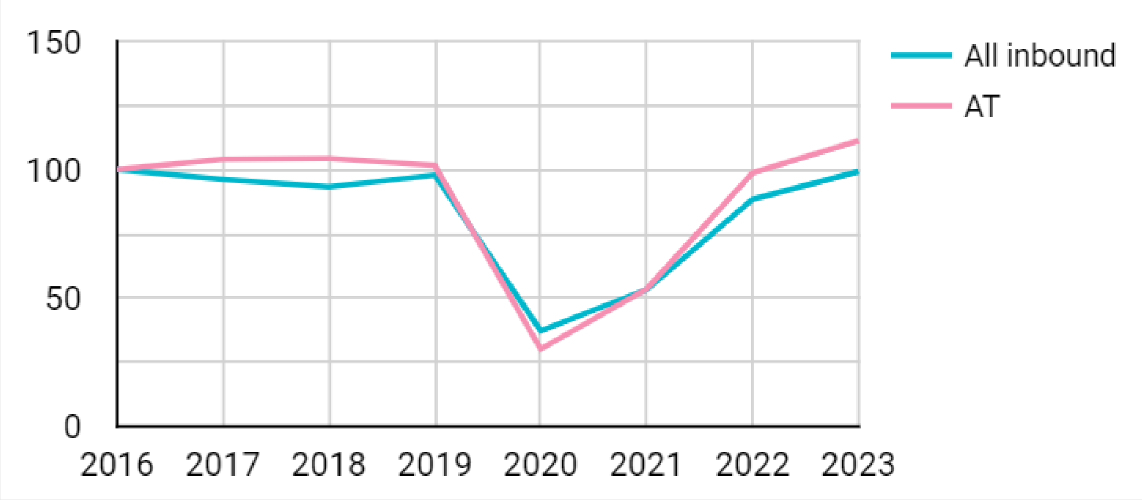
Arrivals in paid accommodation

Trends 2016-2023

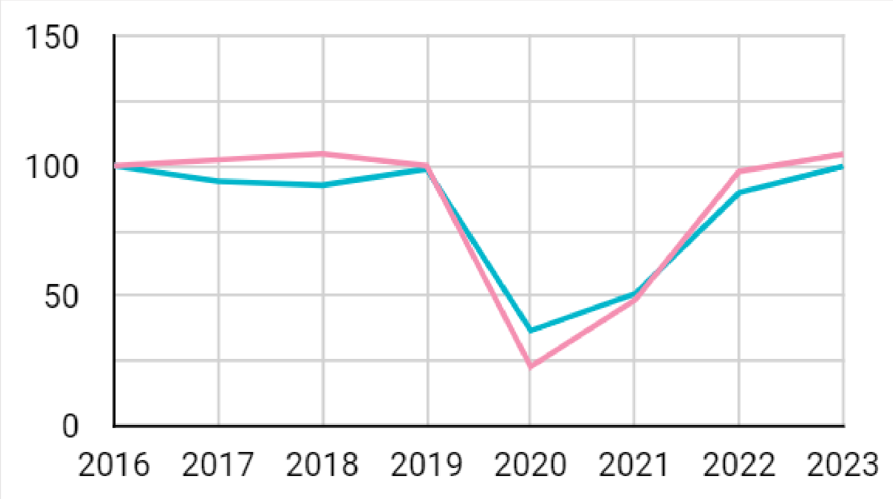
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



All paid accommodation (*), Luxembourg City (2016 = Index 100)



(*) excluding camping.
Source: Statec

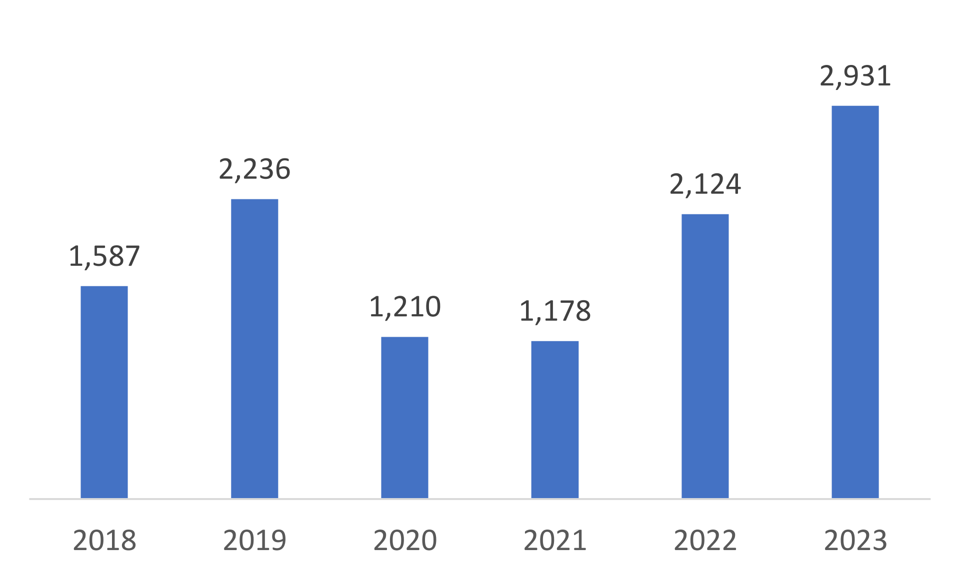
Short-term rentals

**Nights,
Short-term rentals, 2023**

2.931

+38% (vs. 2022)
+31% (vs. 2019)

**Nights,
Short-term rentals, 2018-2023**



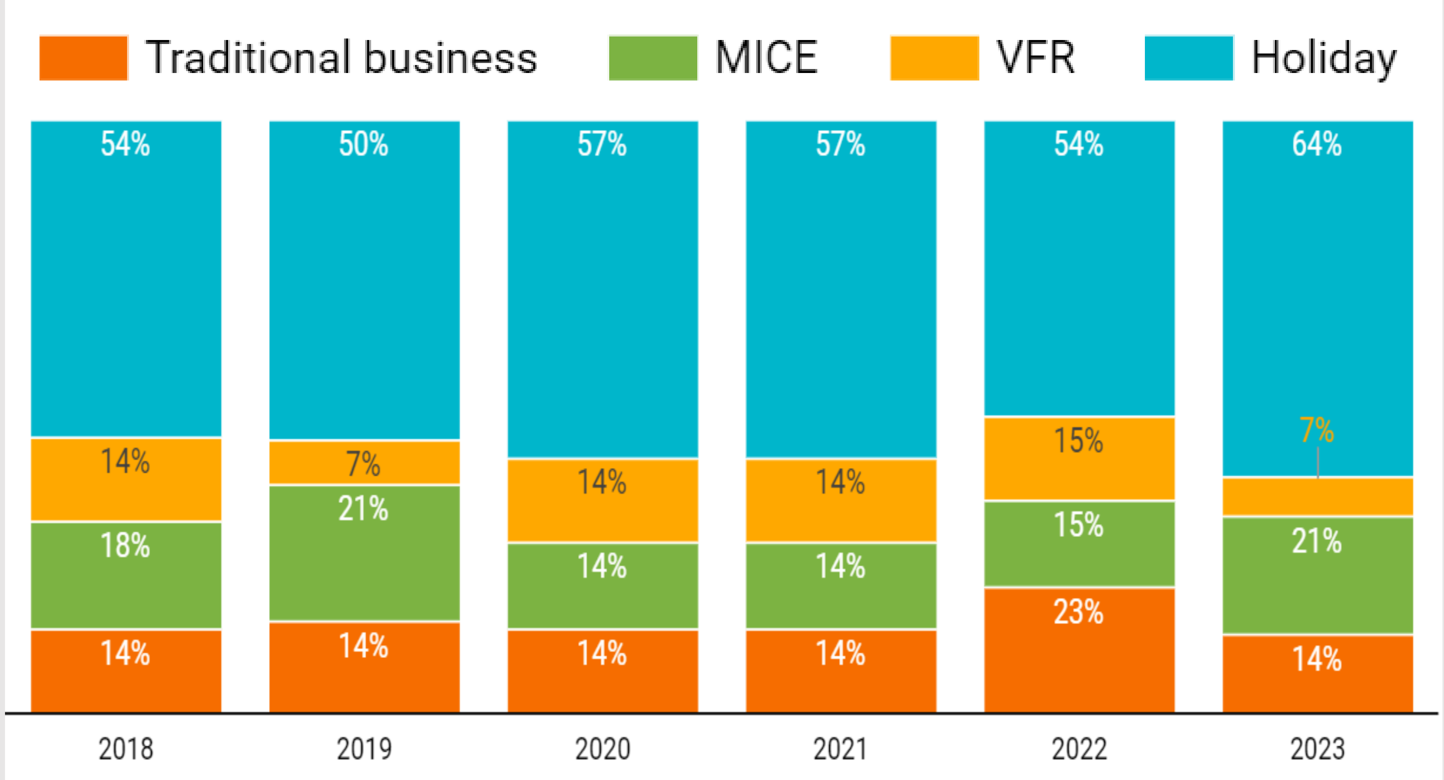
Source: Eurostat (experimental statistics).

Characteristics of Austrian inbound trips to Luxembourg

Austrian trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2018-2023

Austrian trips to Luxembourg, 2018-2023



2023

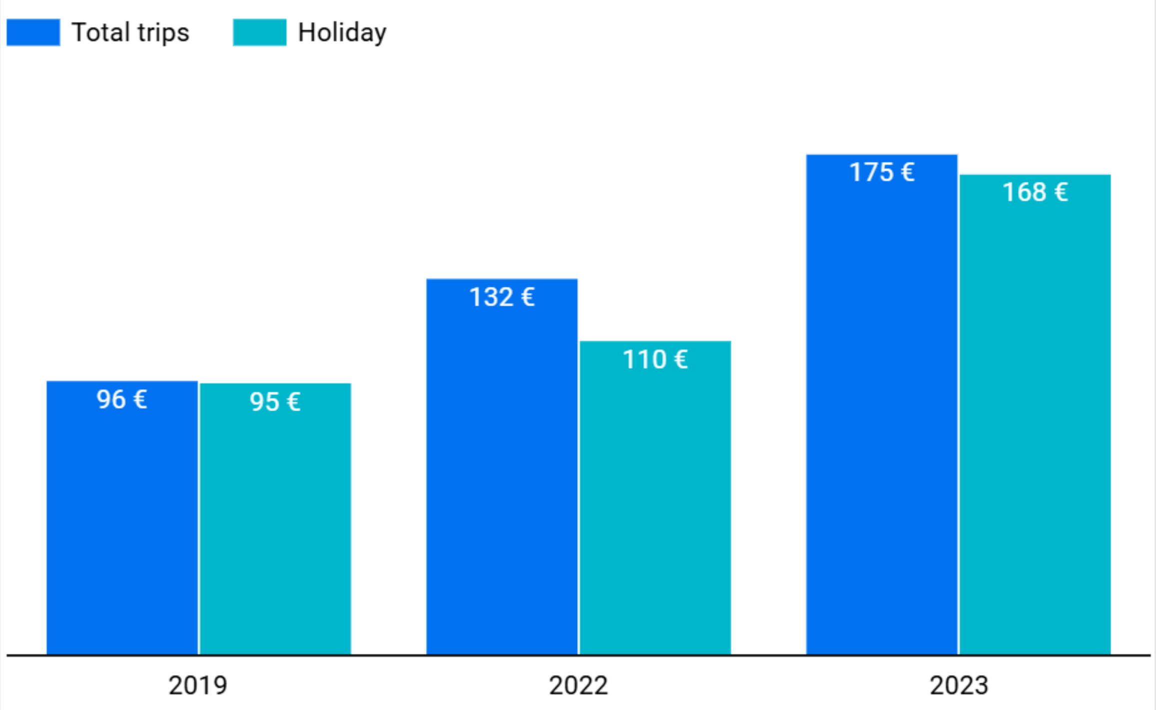
	Austria to	**Europe to**
	Luxembourg	
Holiday	64%	62%
VFR	7%	15%
MICE	21%	14%
Traditional Business	14%	9%

Source: World Travel Monitor/IPK International.

Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

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



2023

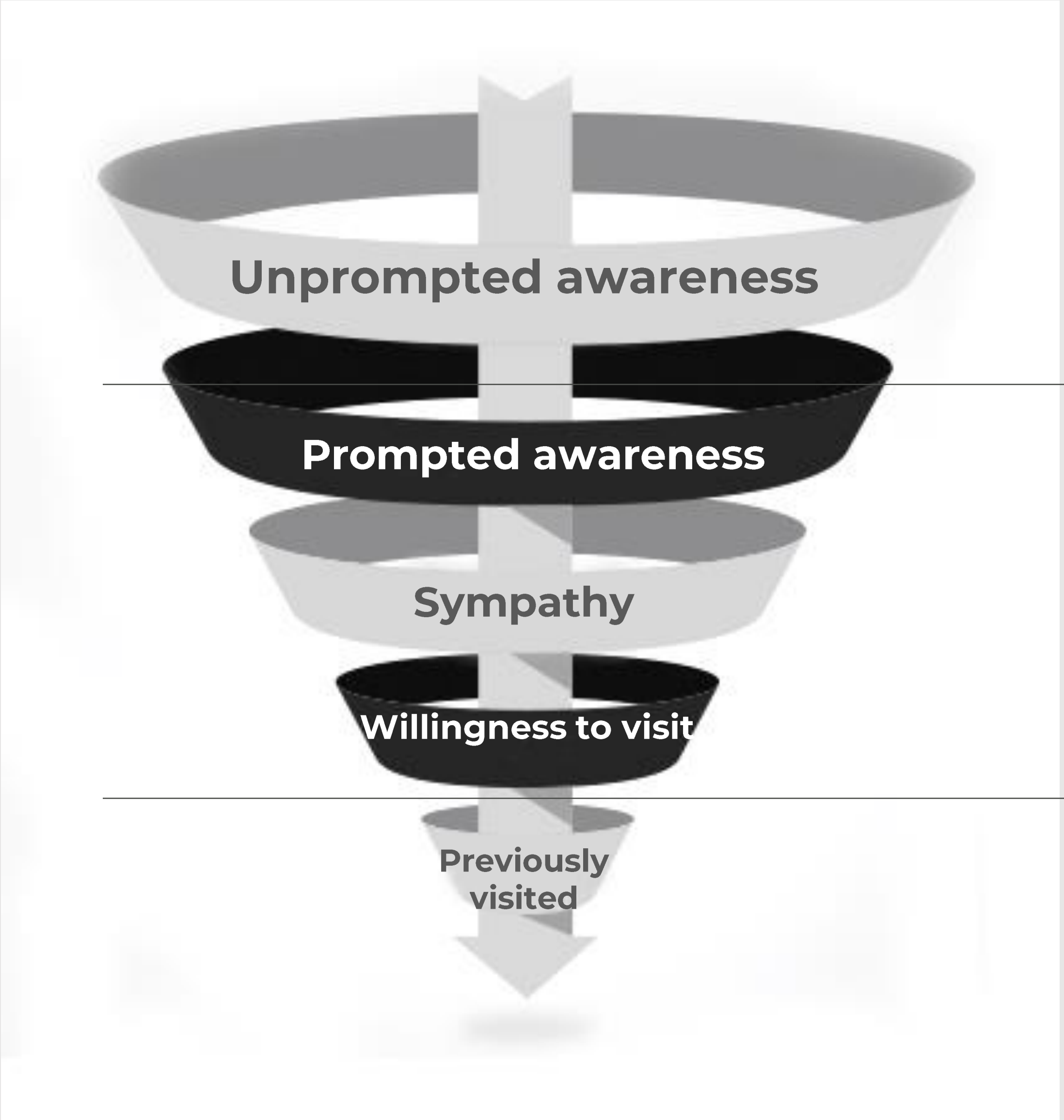
	Austria to Luxembourg	Europe to Luxembourg
Spend/day/pers. on **all** trips	175 €	152 €
Spend/day/pers. on **holiday** trips	168 €	144 €

Source: World Travel Monitor/IPK International.

Brand strength & Growth potential

Brand Funnel 2024

Assessing Luxembourg’s brand strength as a destination



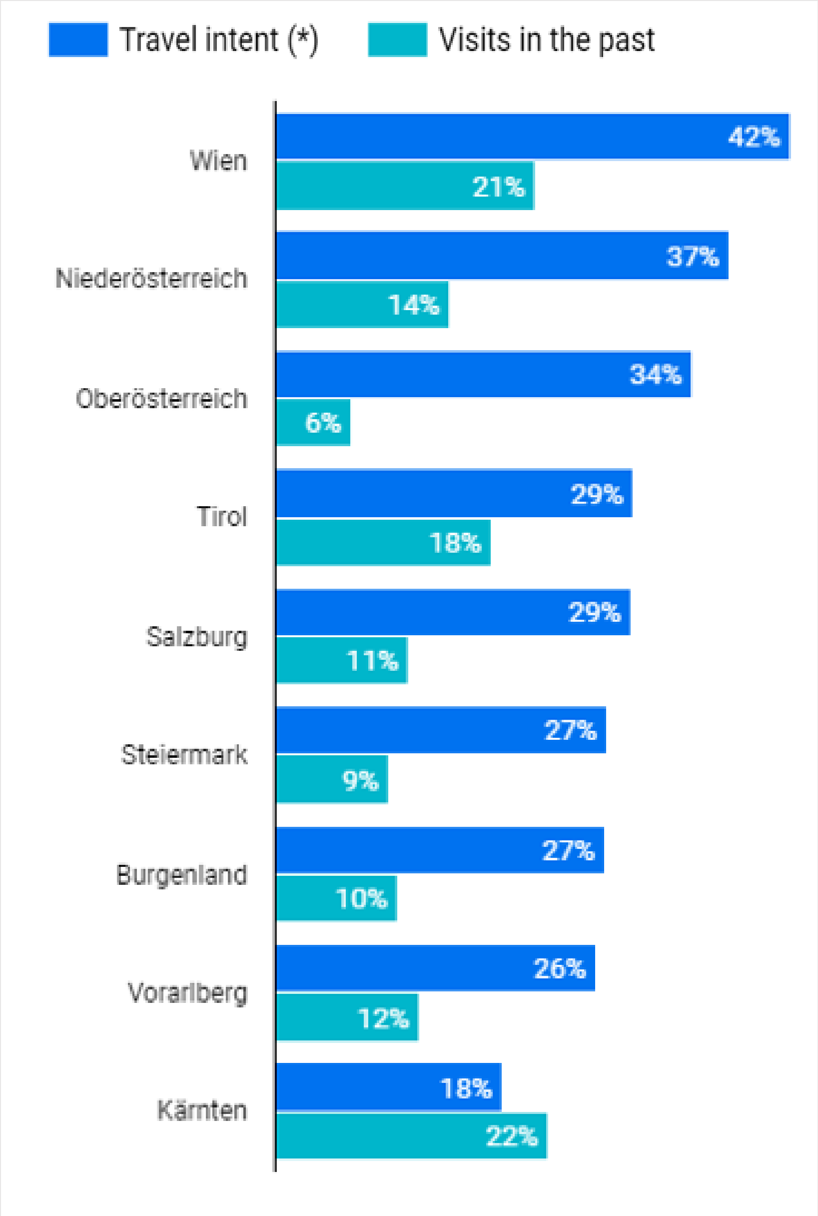
	
0.3%	1.5%
83%	82%
58%	55%
17%	15%
16%	20%

Core future visitor potential from Austria (*)
1.1 million

Source: LFT Brand & Potential Study.
(*) Based on travel intent for next 3 years.

Regional origin 2024

Past visitors and future potential



Source: LFT Brand & Potential Study.

General theme interest (*)

Theme	Rank (EU)	Rank (AT)	% interested (AT)
Culinary	2	**1**	74%
Nature	3	**2**	71%
Resting/Relaxation	1	**3**	71%
Sightseeing	4	**4**	70%
Immersive travel	6	**5**	69%
City	5	**6**	67%
Architecture/townscapes	7	**7**	67%
Fun/entertainment	8	**8**	65%
Family	12	**9**	60%
Exchanging with locals	13	**10**	60%
Castles	9	**11**	59%
History/Unesco	10	**12**	59%
Culture	11	**13**	59%
Learning/new skills	14	**14**	56%
Events	16	**15**	55%
Sustainability	15	**16**	55%
Hiking	17	**17**	53%
Nightlife (**)	20	**18**	53%
Adventure/action	19	**19**	52%
Travelling by train	18	**20**	49%
Active-sports	27	**21**	49%
Wellness	25	**22**	48%
Wine	21	**23**	47%
Countryside	22	**24**	44%
Shopping	23	**25**	43%
Cycling	31	**26**	43%
Luxury	24	**27**	43%
Remembrance	26	**28**	42%
Camping	29	**29**	39%
Industrial heritage	28	**30**	39%
Film locations	30	**31**	38%
MTB	32	**32**	32%
Motorcycling	33	**33**	29%

(*) 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).

Source: LFT Brand & Potential Study.

Luxembourg's Theme Competence (*)

Theme			
	Rank	**Rank**	% agreeing
Culinary	3	**1**	41%
City	1	**2**	41%
Architecture/townscapes	4	**3**	36%
Culture	6	**4**	33%
Castles	7	**5**	31%
Luxury	9	**6**	31%
Nature	5	**7**	31%
Resting/Relaxation	2	**8**	29%
Shopping	10	**9**	24%
Family	8	**10**	23%
History/Unesco	12	**11**	22%
Fun/entertainment	13	**12**	22%
Nightlife (***)	14	**13**	22%
Wine	15	**14**	20%
Active-sports	21	**15**	19%
Hiking	11	**16**	19%
Events	23	**17**	18%
Cycling	20	**18**	18%
Wellness	16	**19**	18%
Sustainability	18	**20**	17%
Adventure/action	22	**21**	15%
Remembrance	26	**22**	15%
Countryside	17	**23**	15%
Camping	19	**24**	14%
Industrial heritage	24	**25**	14%
MTB	25	**26**	10%

Growth potential for themes (**)

- Nature
- Resting/relaxation
- Family
- Sustainability
- Hiking
- Wellness
- Countryside
- Camping
- Industrial Heritage
- MTB

(*) 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 general theme interest in the source market, and to the theme suitability perception across other source markets (European average).

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).

Source: LFT Brand & Potential Study.

Luxembourg's Brand Value Ratings (*)

Feature			
	Rank	**Rank**	% agreeing
safe	1	**1**	42%
of high quality	3	**2**	39%
clean	2	**3**	37%
welcoming, hospitable	4	**4**	33%
open-minded, tolerant, international	6	**5**	32%
exclusive, luxurious	8	**6**	31%
authentic, real	5	**7**	30%
attractive, appealing	7	**8**	25%
varied, diversified	12	**9**	25%
dynamic, modern	9	**10**	25%
service oriented	10	**11**	22%
lively, trendy	13	**12**	20%
not overcrowded / insider tip	14	**13**	20%
surprising	11	**14**	18%
sustainable	15	**15**	16%
affordable	16	**16**	10%

(*) 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.

Spontaneous associations with Luxembourg

Source: LFT Brand & Potential Study.

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