



Luxembourg for Tourism

Market profile

ITALY

2023



# **Economic indicators & General Travel Demand**

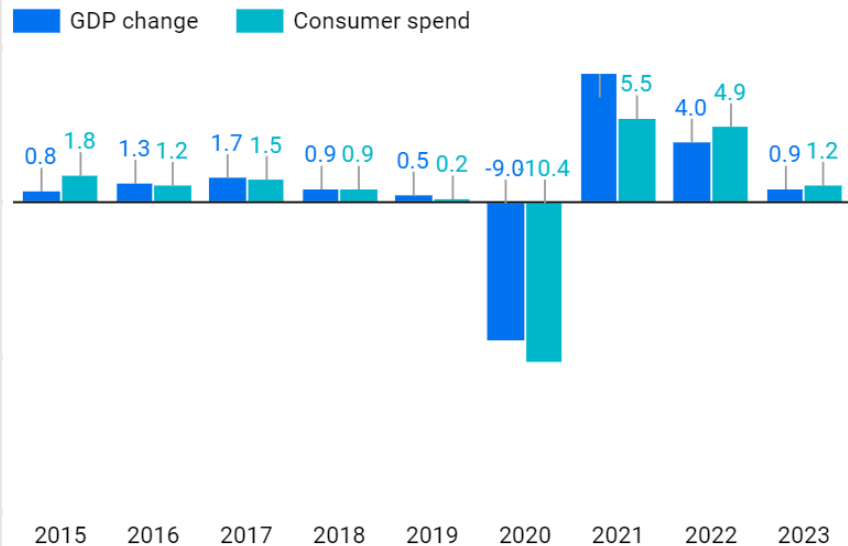
# Economic indicators - General travel demand



## Economy & population

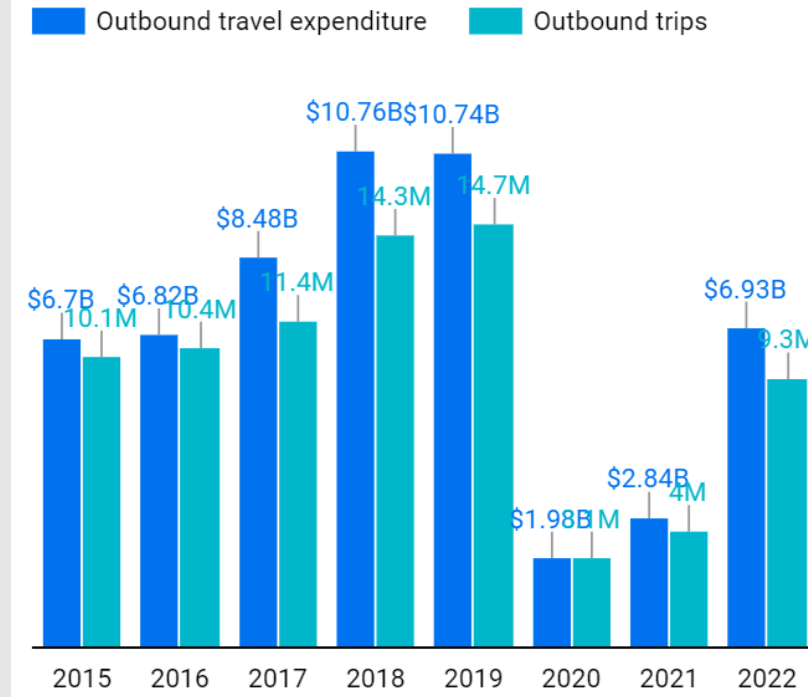
GDP (\$) per capita: 38,326  
 Unemployment (%): 7.7  
 Population (mn): 58.9  
 Inflation (%): 5.9

### GDP and Consumer spending, % annual change



Share of short trips (1-3 nights),  
 % all outbound trips (2022)  
**21.1%**

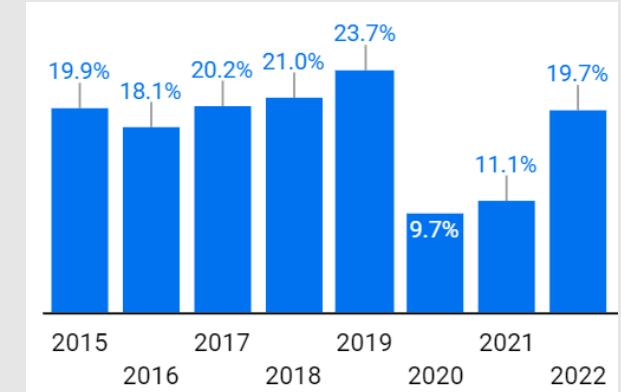
## Outbound trips and travel expenditure



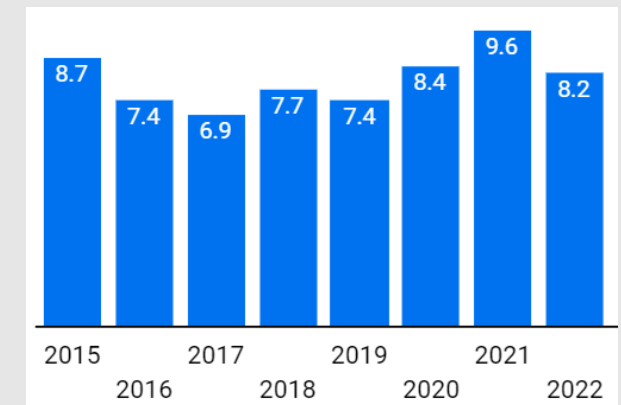
Average spend  
 per outbound trip (2019)  
**729 \$**

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

## Share of outbound travel, % all trips



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



Share of leisure,  
 % all outbound trips (2022)  
**91.7%**



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

# Nights, arrivals & length of stay in paid accommodation 2023



**Nights,  
paid accommodation, 2023**



**+2%** (vs. 2022)  
**-26%** (vs. 2019)

**Arrivals,  
paid accommodation, 2023**



**+10%** (vs. 2022)  
**-10%** (vs. 2019)

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



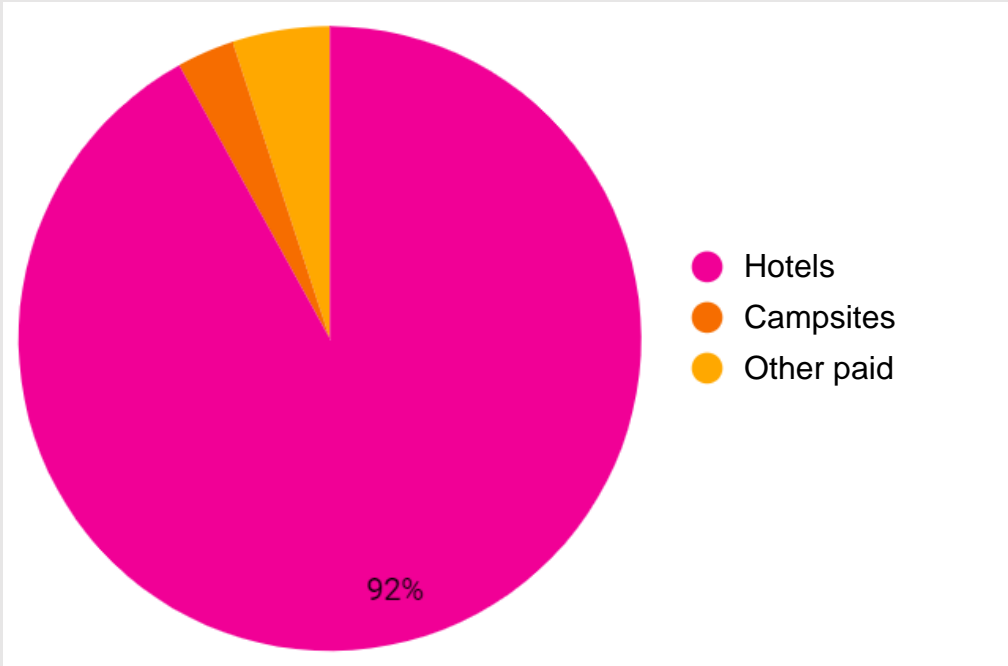
**-0.17 days** (vs. 2022)  
**-0.47 days** (vs. 2019)

# Nights & arrivals in paid accommodation

## Type of accommodation, 2023

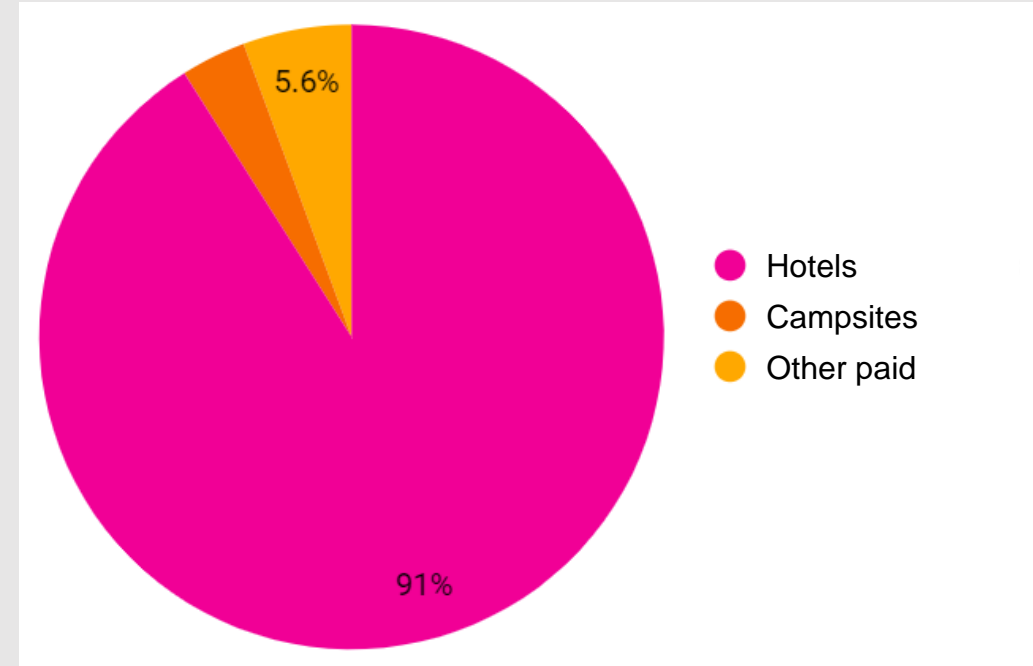


### Nights, paid accommodation, 2023



<b>Hotels</b>	<b>53.556</b>	+3% (vs. 2022) -23% (vs. 2019)
<b>Other paid accomm.</b>	<b>2.946</b>	-10% (vs. 2022) -54% (vs. 2019)
<b>Campsites</b>	<b>1.738</b>	+8% (vs. 2022) -33% (vs. 2019)

### Arrivals, paid accommodation, 2023



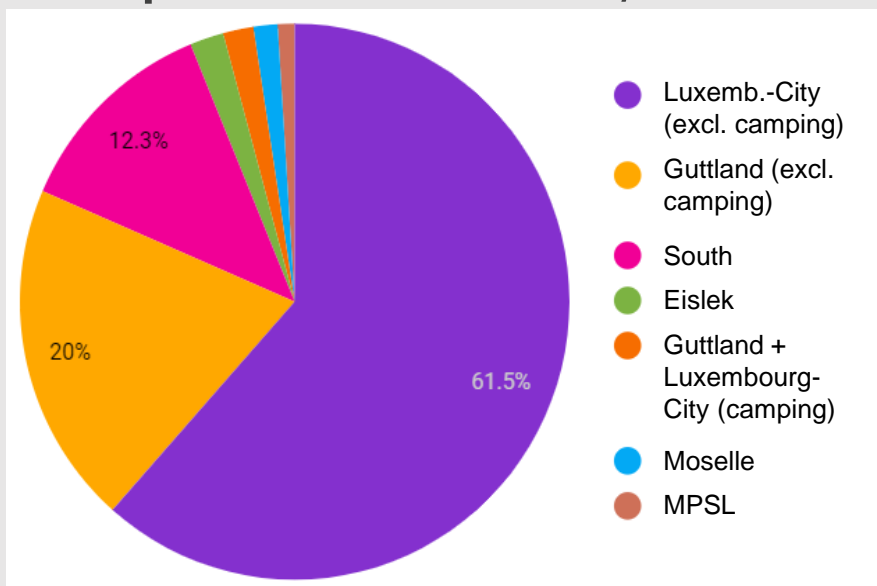
<b>Hotels</b>	<b>24.269</b>	+12% (vs. 2022) -8% (vs. 2019)
<b>Other paid accomm.</b>	<b>1.500</b>	-11% (vs. 2022) -32% (vs. 2019)
<b>Campsites</b>	<b>898</b>	+6% (vs. 2022) -15% (vs. 2019)

# Nights & arrivals in paid accommodation

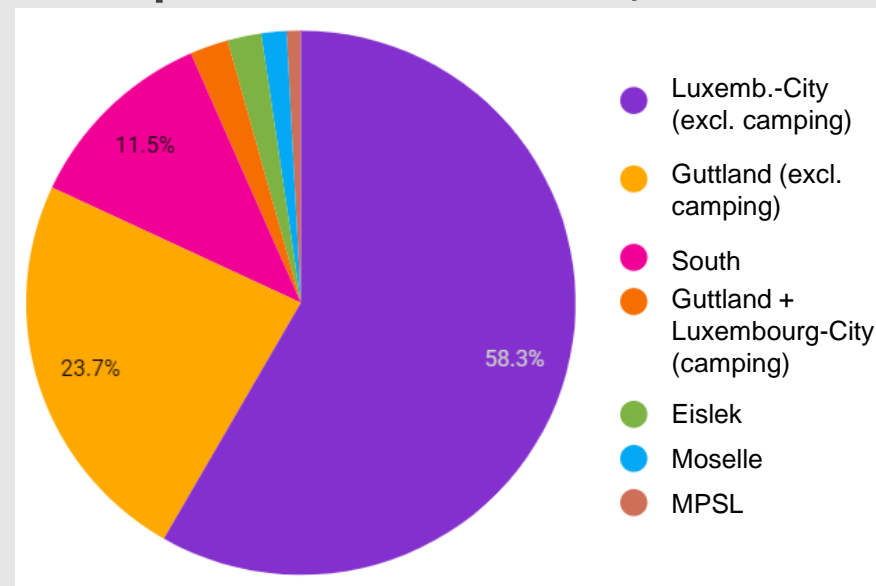
## Regions, 2023



### Nights, paid accommodation, 2023



### Arrivals, paid accommodation, 2023



<b>Lux.-City</b> (excl. camping)	<b>35.842</b>	+2% (vs. 2022) -6% (vs. 2019)
<b>Guttland</b> (excl. camping)	<b>11.630</b>	+8% (vs. 2022) -22% (vs. 2019)
<b>South</b>	<b>7.163</b>	-13% (vs. 2022) -64% (vs. 2019)
<b>Eislek</b>	<b>1.159</b>	+73% (vs. 2022)-49% (vs. 2019)
<b>Guttland/Lux.-City</b> (camping)	<b>1.043</b>	-7% (vs. 2022) -5% (vs. 2019)
<b>Moselle</b>	<b>825</b>	+27% (vs. 2022)-43% (vs. 2019)
<b>MPSL</b>	<b>578</b>	+28% (vs. 2022)-32% (vs. 2019)

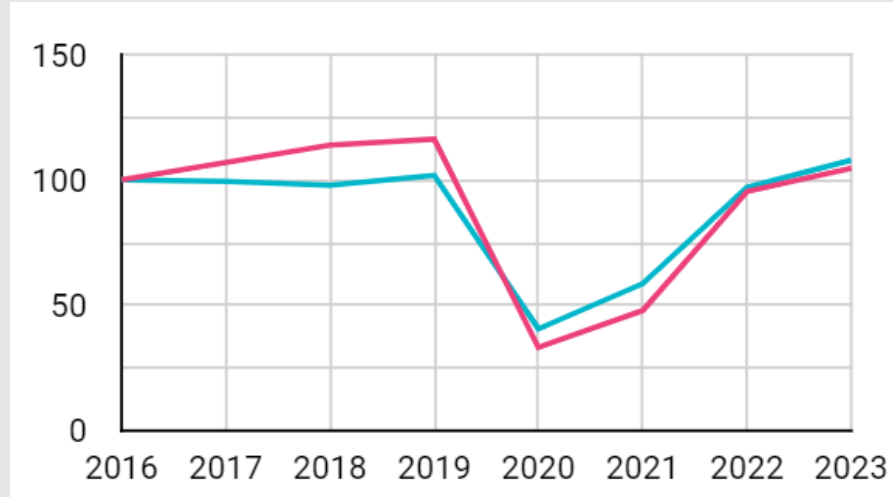
<b>Lux.-City</b> (excl. camping)	<b>15.549</b>	+9% (vs. 2022) +9% (vs. 2019)
<b>Guttland</b> (excl. camping)	<b>6.307</b>	+11% (vs. 2022) -18% (vs. 2019)
<b>South</b>	<b>3.062</b>	+7% (vs. 2022) -41% (vs. 2019)
<b>Guttland/Lux.-City</b> (camping)	<b>602</b>	+1% (vs. 2022) -24% (vs. 2019)
<b>Eislek</b>	<b>531</b>	+37% (vs. 2022)-9% (vs. 2019)
<b>Moselle</b>	<b>394</b>	+19% (vs. 2022)-41% (vs. 2019)
<b>MPSL</b>	<b>222</b>	+4% (vs. 2022) -47% (vs. 2019)

# Arrivals in paid accommodation

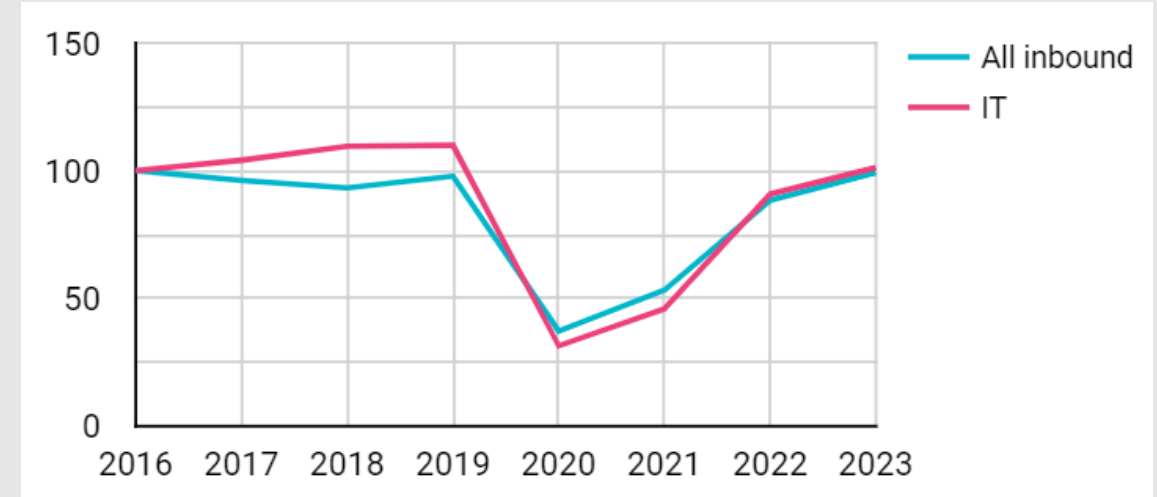
## Trends 2016-2023



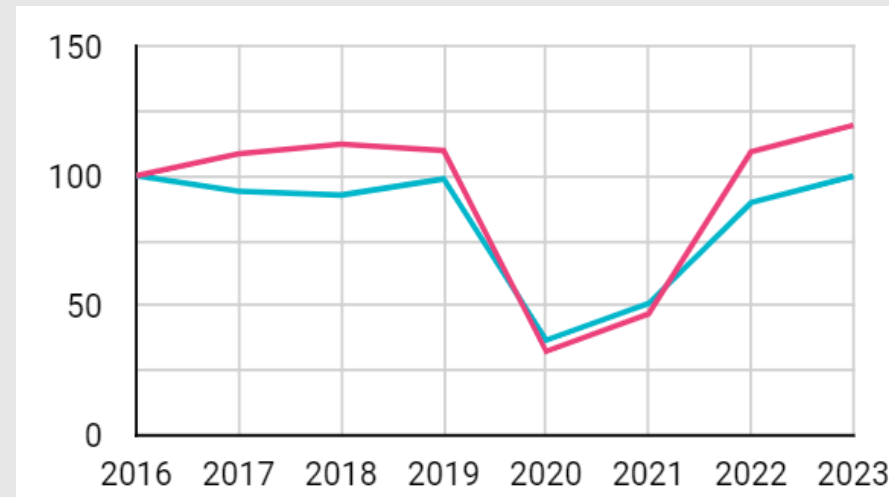
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



(\*), excluding camping.  
Source: Statoc

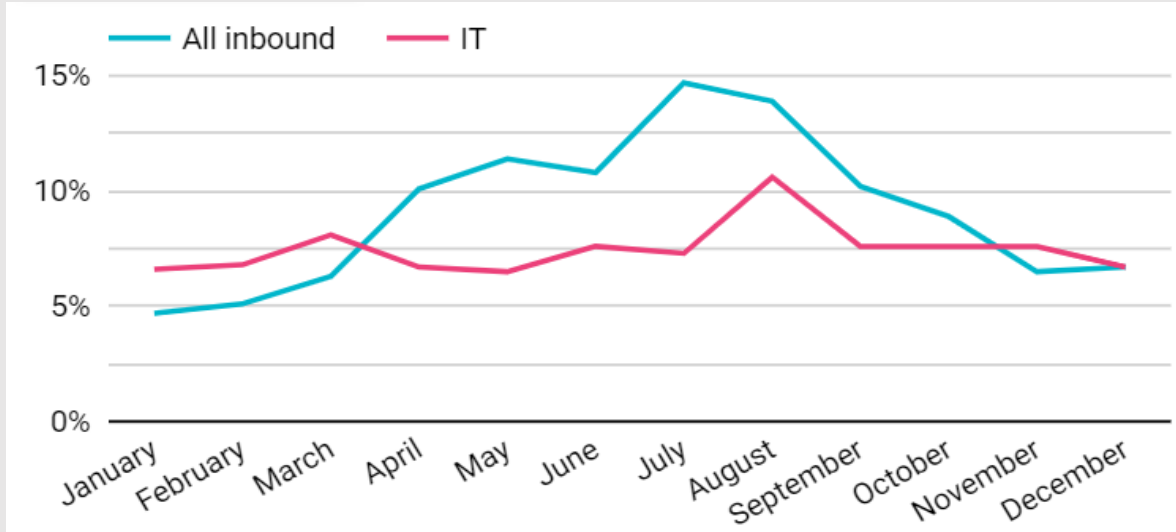


# Arrivals in paid accommodation

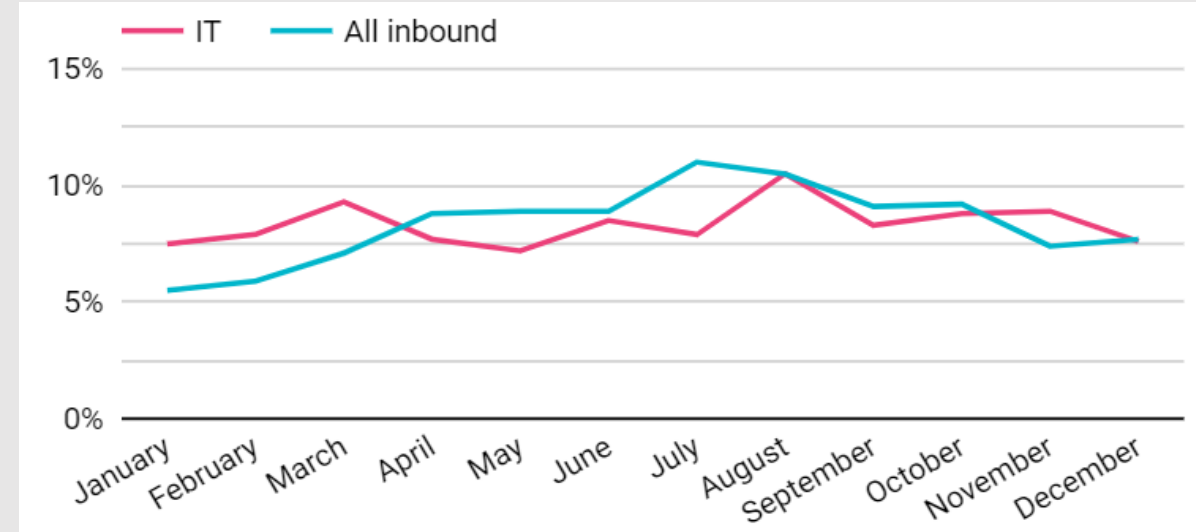
## Seasonality



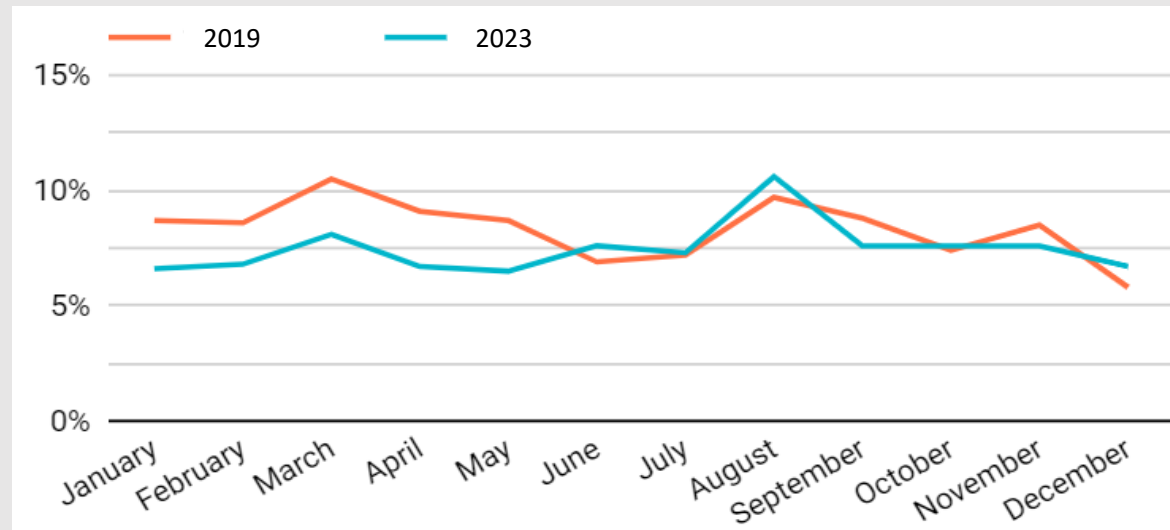
### All paid accommodation, 2023



### Hotels, 2023



### All paid accommodation, arrivals from Italy



# Short-term rentals

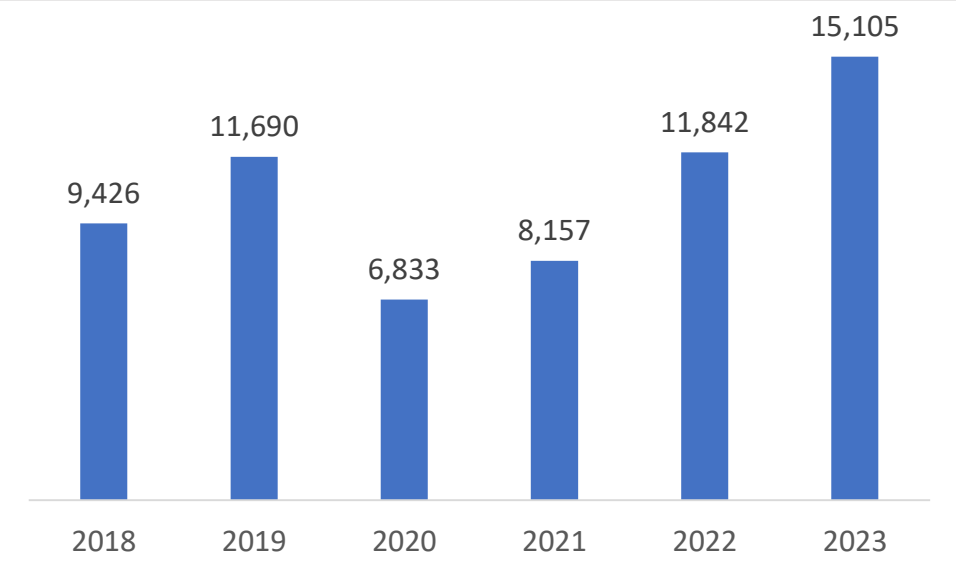


**Nights,  
Short-term rentals, 2023**



+28% (vs. 2022)  
+29% (vs. 2019)

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





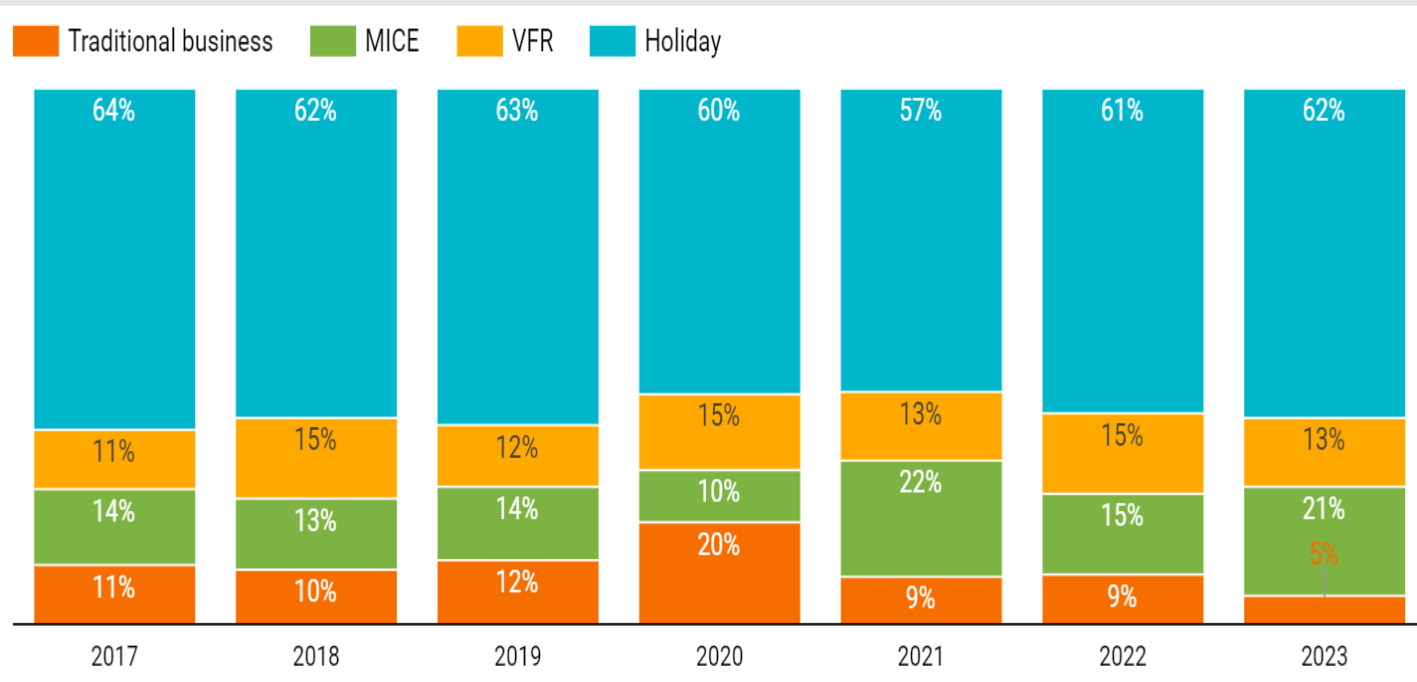
# **Characteristics of Italian inbound trips to Luxembourg**

# Italian trips to Luxembourg with overnight (all accommodation)



## Purpose of visit, 2017-2023

Italian trips to Luxembourg, 2017-2023



### 2023

	Italy to Luxembourg	Europe to Luxembourg
Holiday	62%	62%
VFR	13%	15%
MICE	21%	14%
Traditional Business	5%	9%



# **Travel behaviour of Italian leisure visitors in Luxembourg**

# Holiday types

## Inbound leisure visitors with overnight, 2022-2023



Italy

All inbound

### Main holiday types

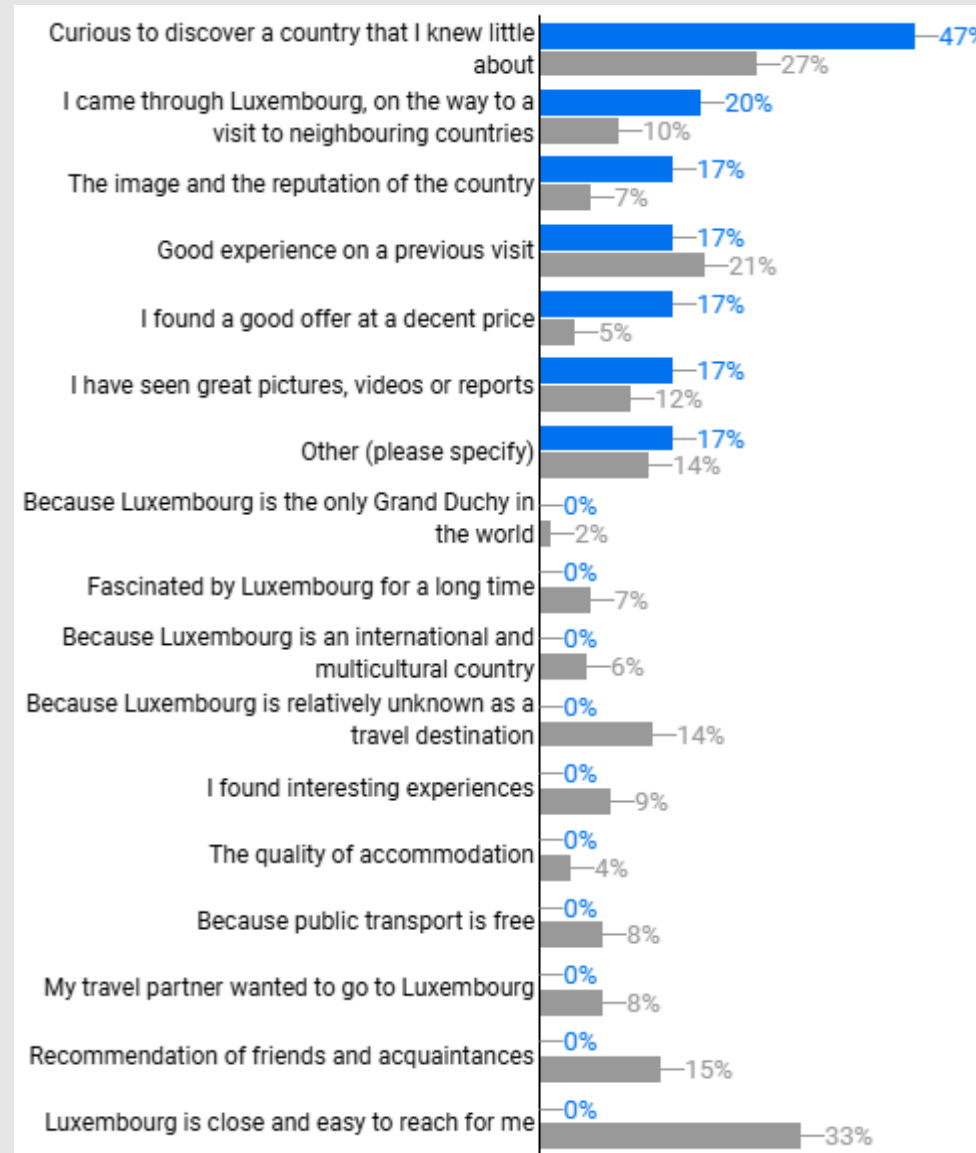
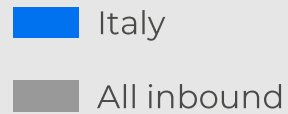


### Additional holiday types



# Key decision criteria for choosing Luxembourg

## Inbound leisure visitors with overnight (\*), 2022-2023



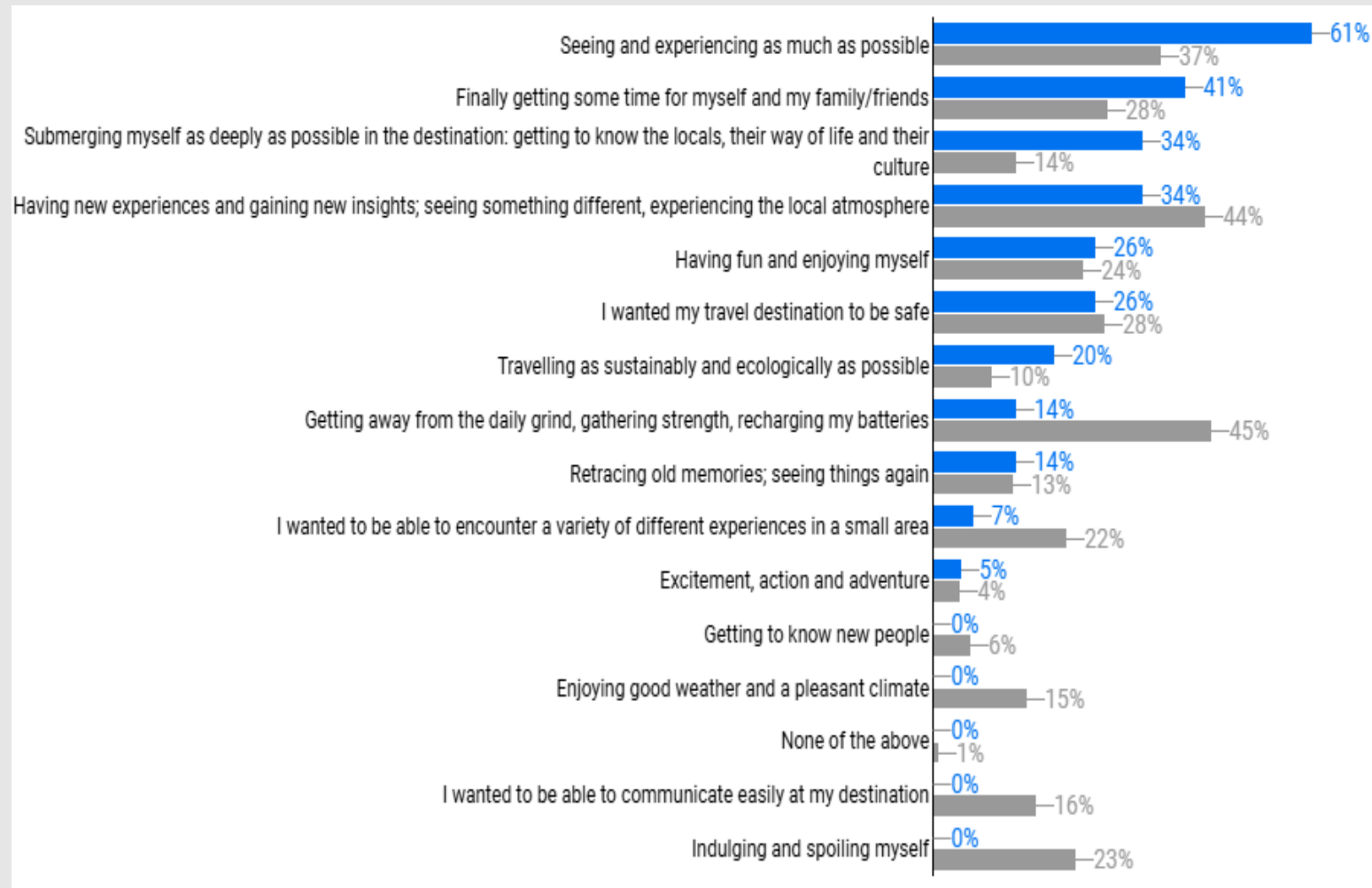
# Key travel motivations

Inbound leisure visitors with overnight, 2022-2023



Italy

All inbound

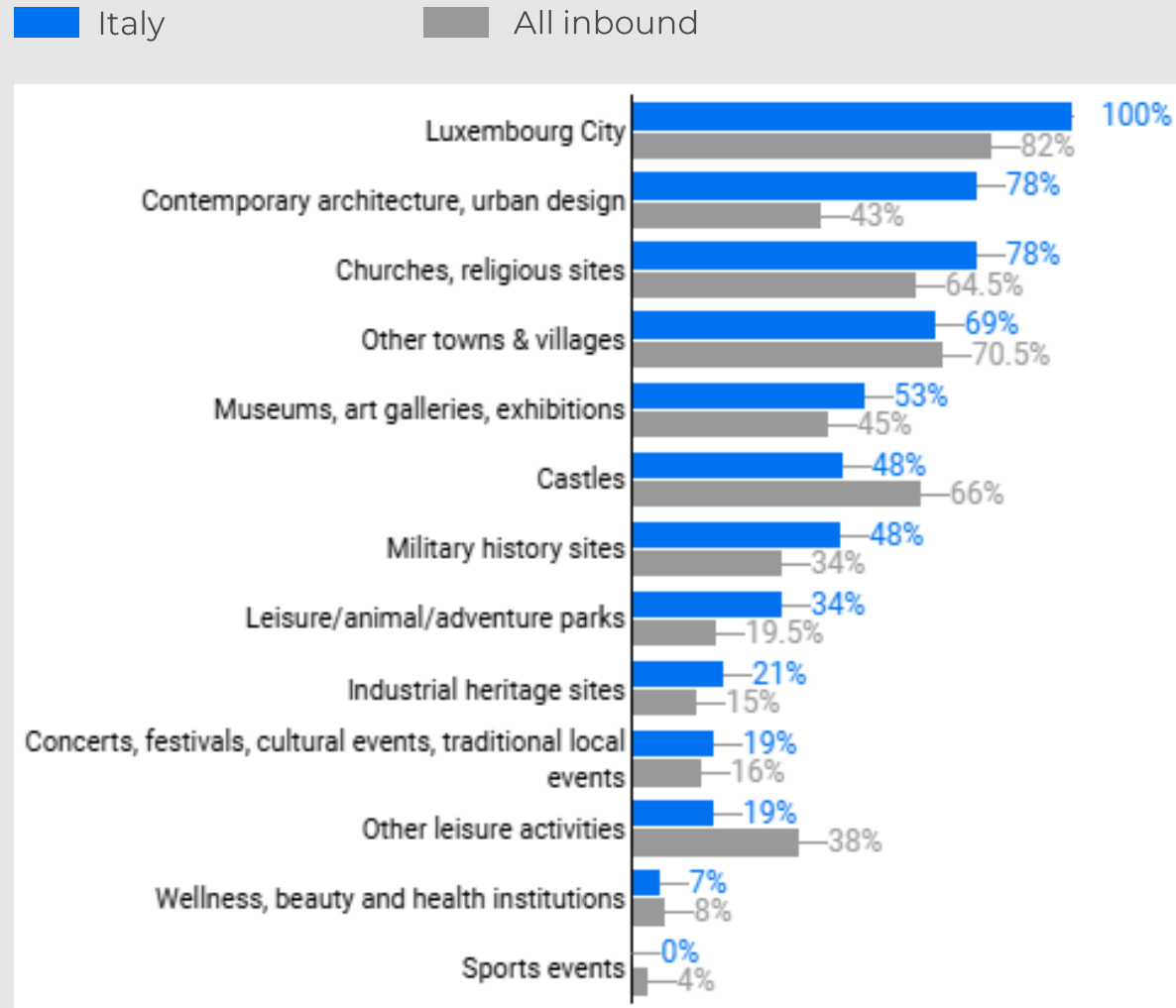






# Type of places visited in Luxembourg

## Inbound leisure visitors with overnight, 2022-2023

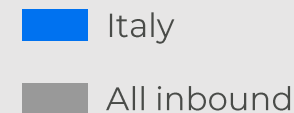
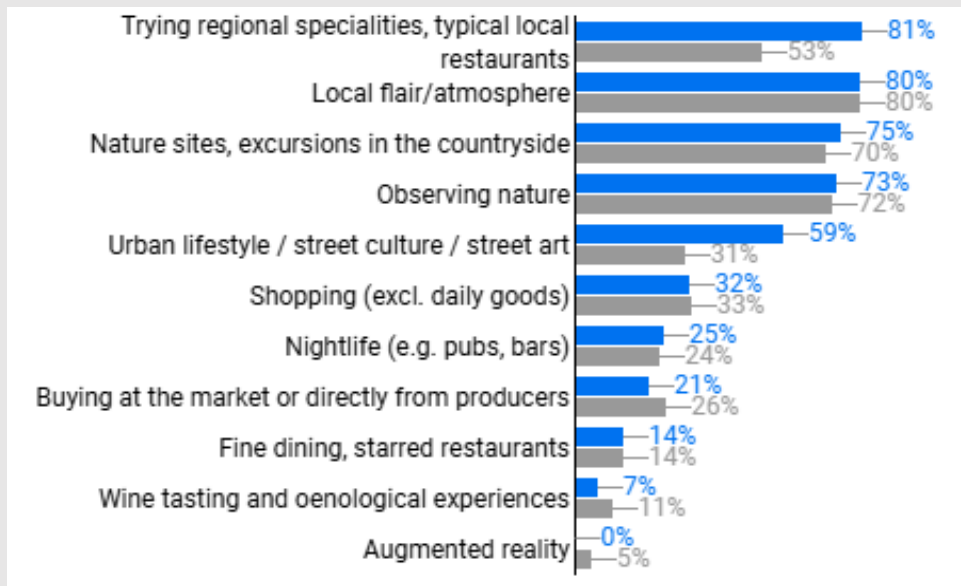


# Activities undertaken in Luxembourg

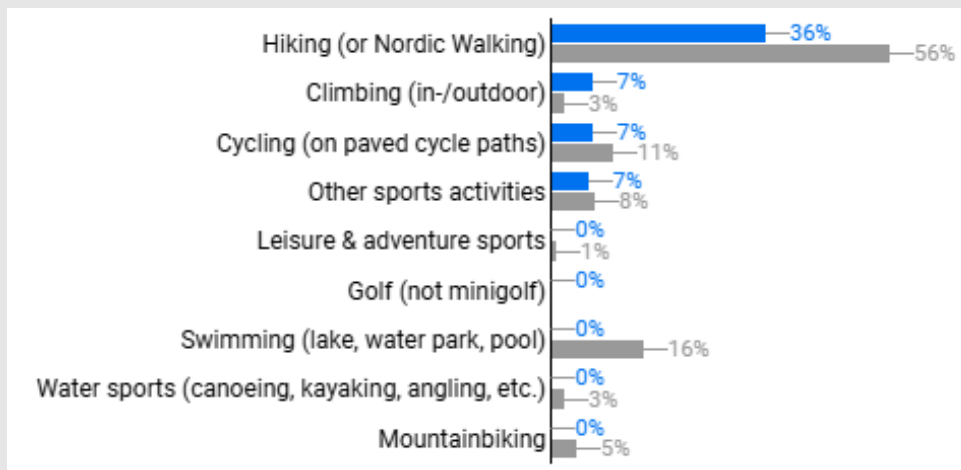
Inbound leisure visitors with overnight, 2022-2023



## Non-sporting activities



## Sporting activities



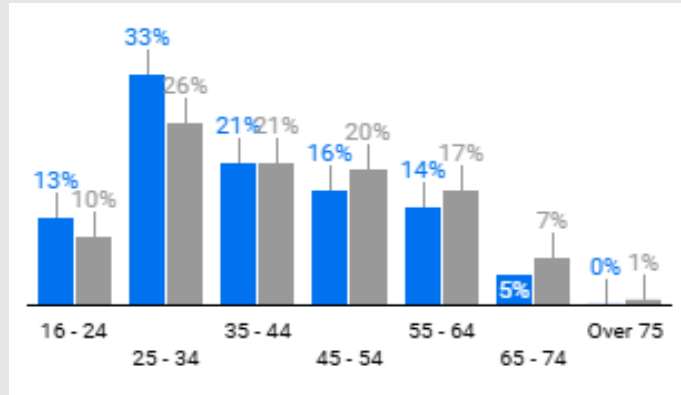
# Transport, travel party, age, repeat visits and cross-border trips

## Inbound leisure visitors with overnight, 2022-2023

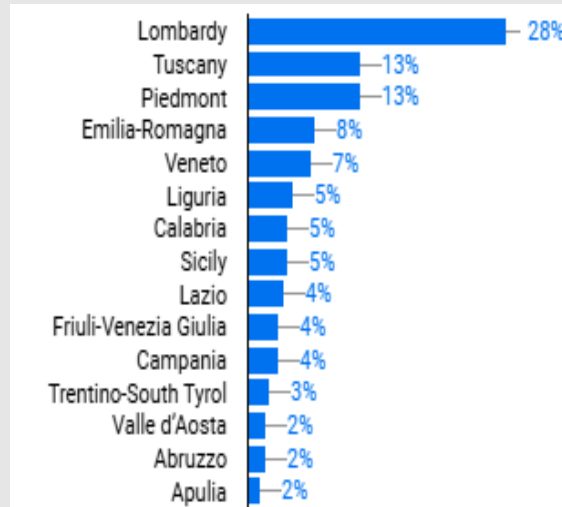


Italy (blue bar) All inbound (grey bar)

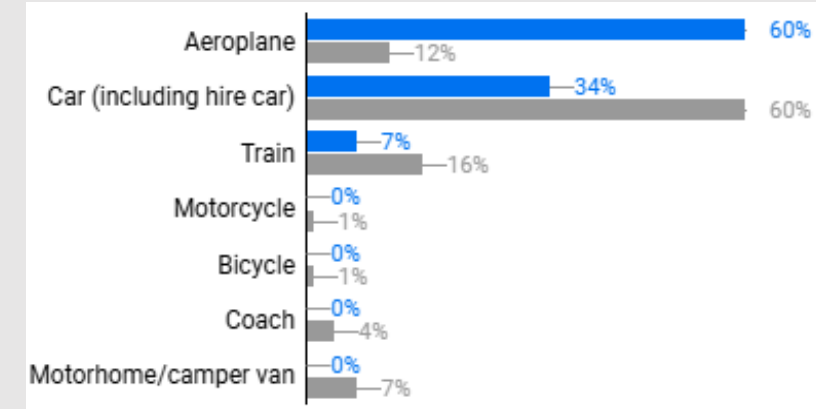
Age groups



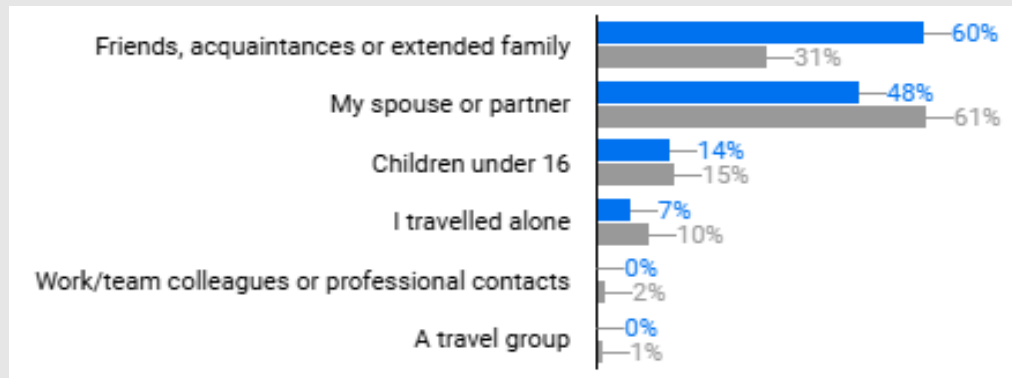
Region of origin



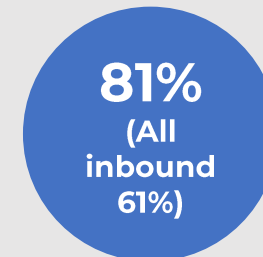
Mode of transport to access Luxembourg



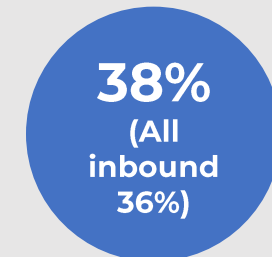
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

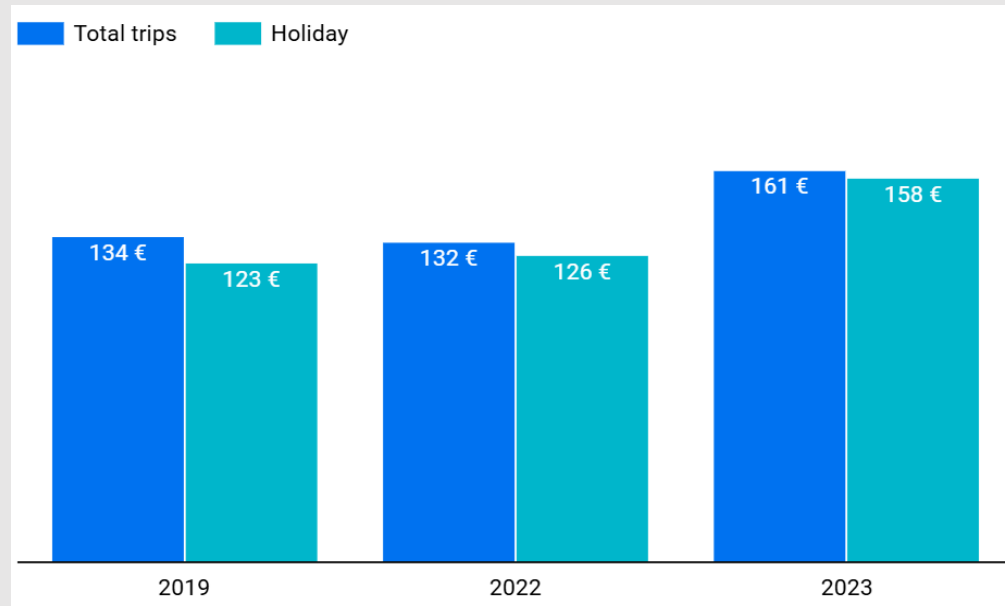


# Expenditure

## Inbound trips to Luxembourg with overnight



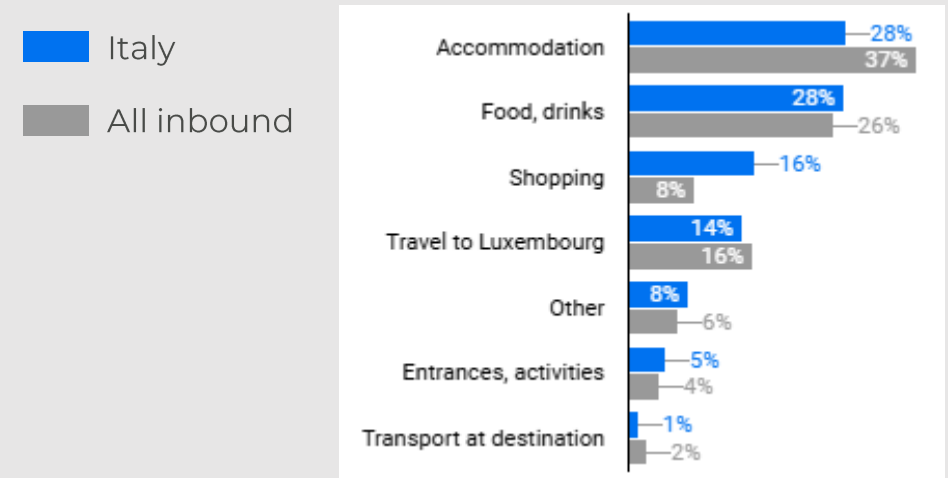
### Italian trips to Luxembourg : average spend per pers. per day



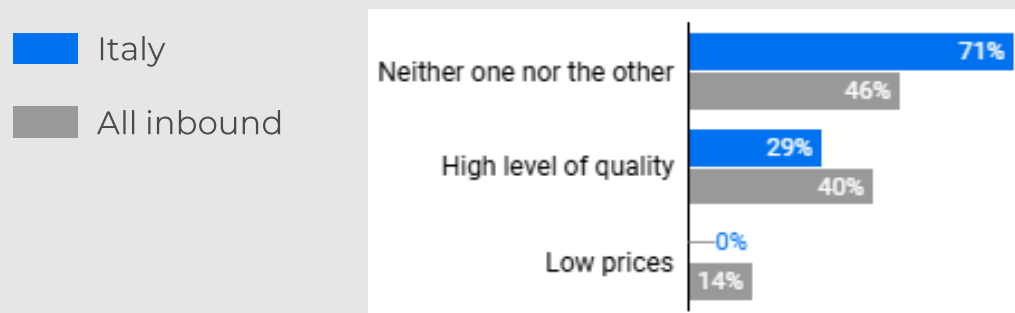
### 2023

	Italy to Luxembourg	Europe to Luxembourg
Spend/day/pers. on <b>all</b> trips	161 €	152 €
Spend/day/pers. on <b>holiday</b> trips	158 €	144 €

### Expenditure of leisure inbound overnight visitors by categories, 2022-2023

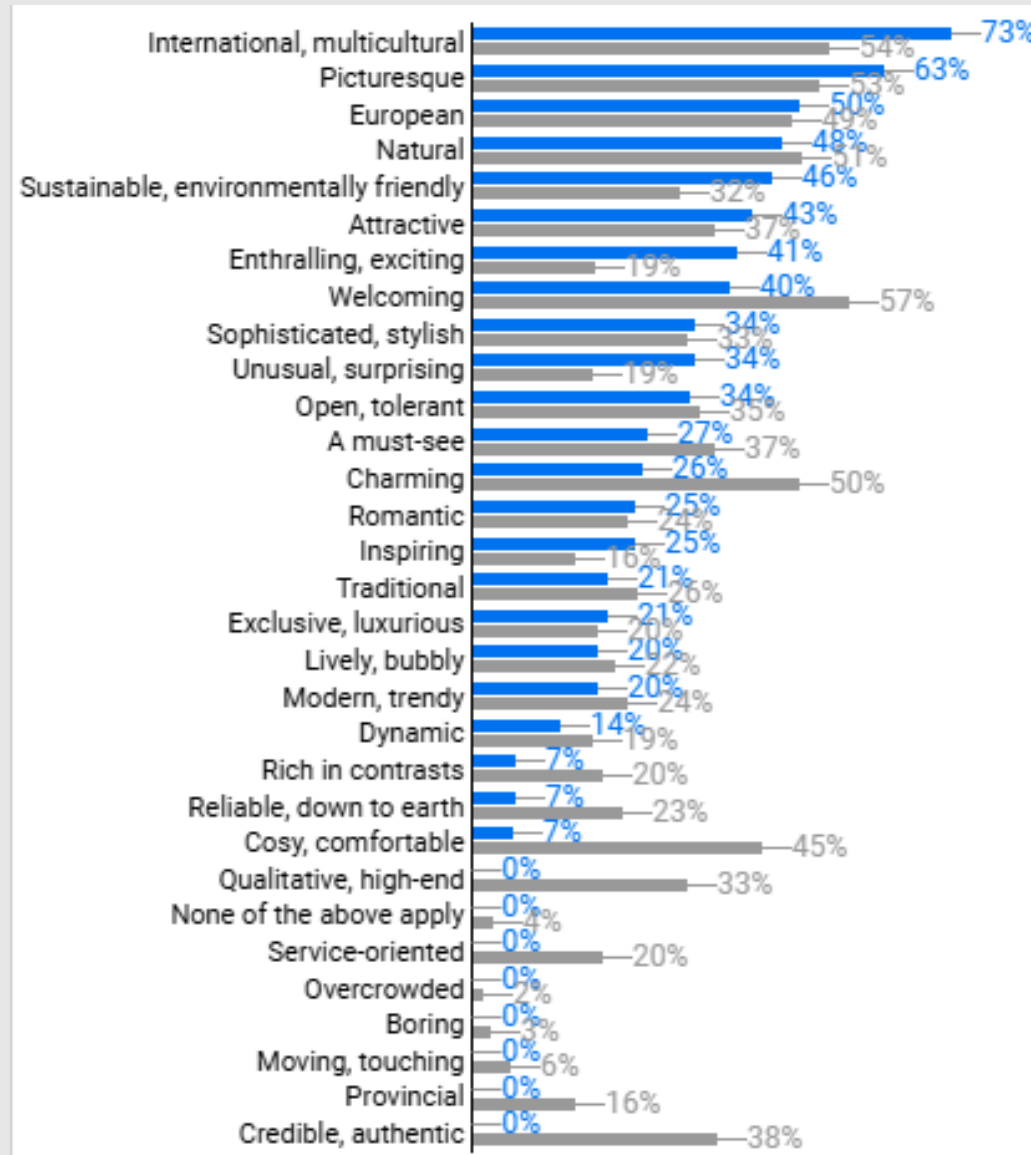
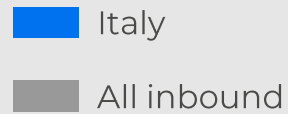


### Quality vs. price orientation



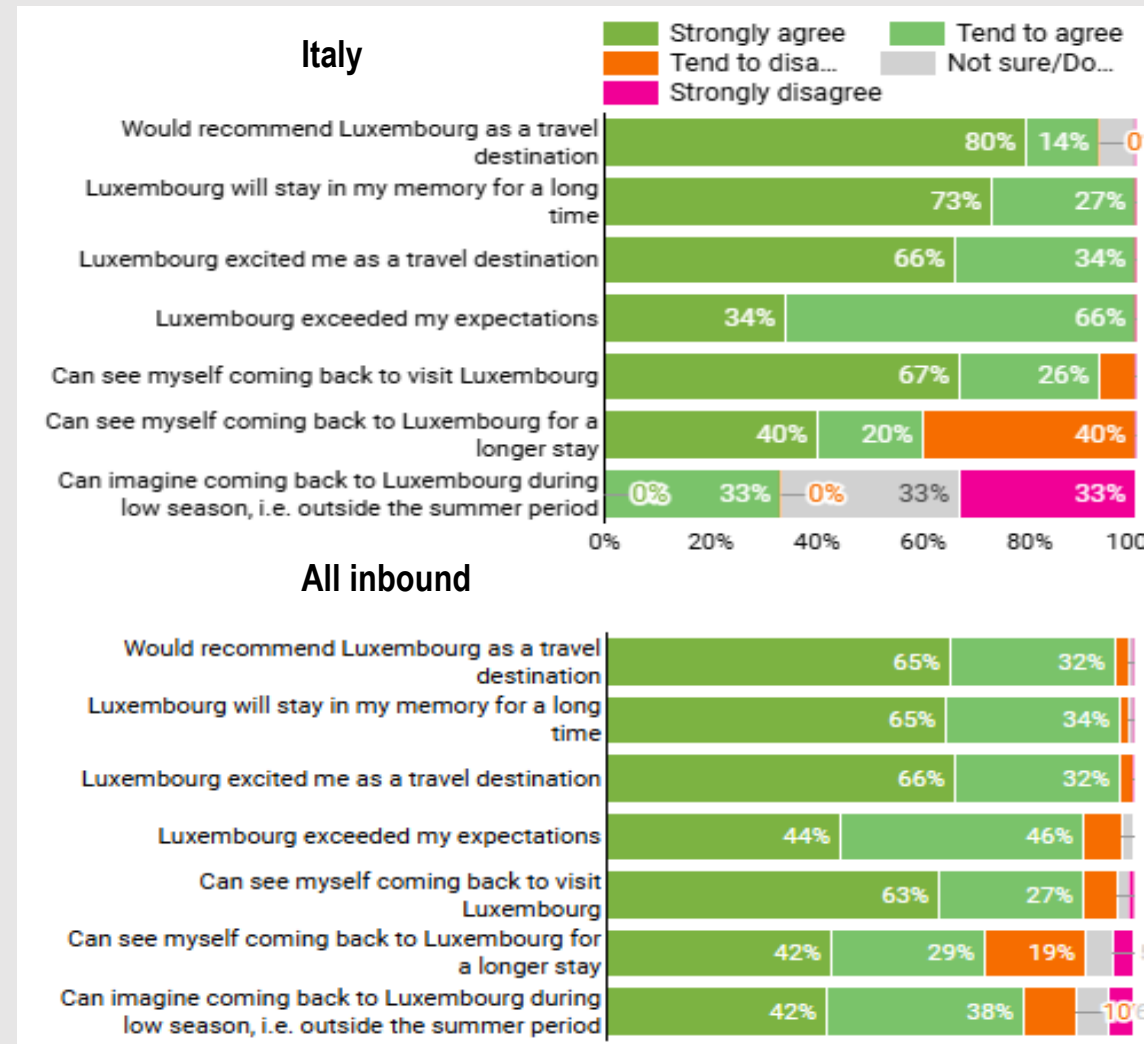
# Image perception of Luxembourg

Inbound leisure visitors with overnight, 2022-2023



# Visitor satisfaction and recommendation

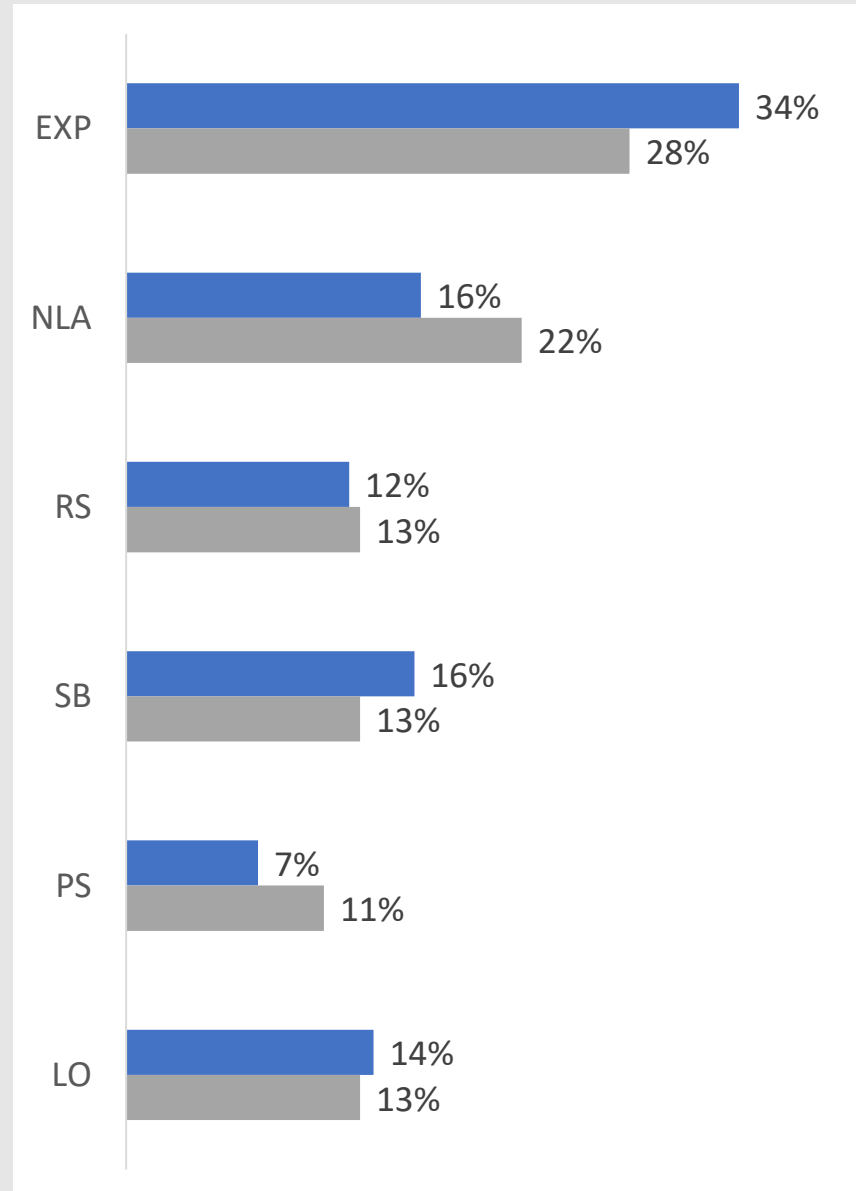
## Inbound leisure visitors with overnight, 2022-2023



# LFT Target Segments



- Explorers**
- Nature-Loving Actives**
- Relaxation Seekers**
- Short Breakers**
- Perfection Seekers**
- Leisure-Oriented**



Italy  
All inbound

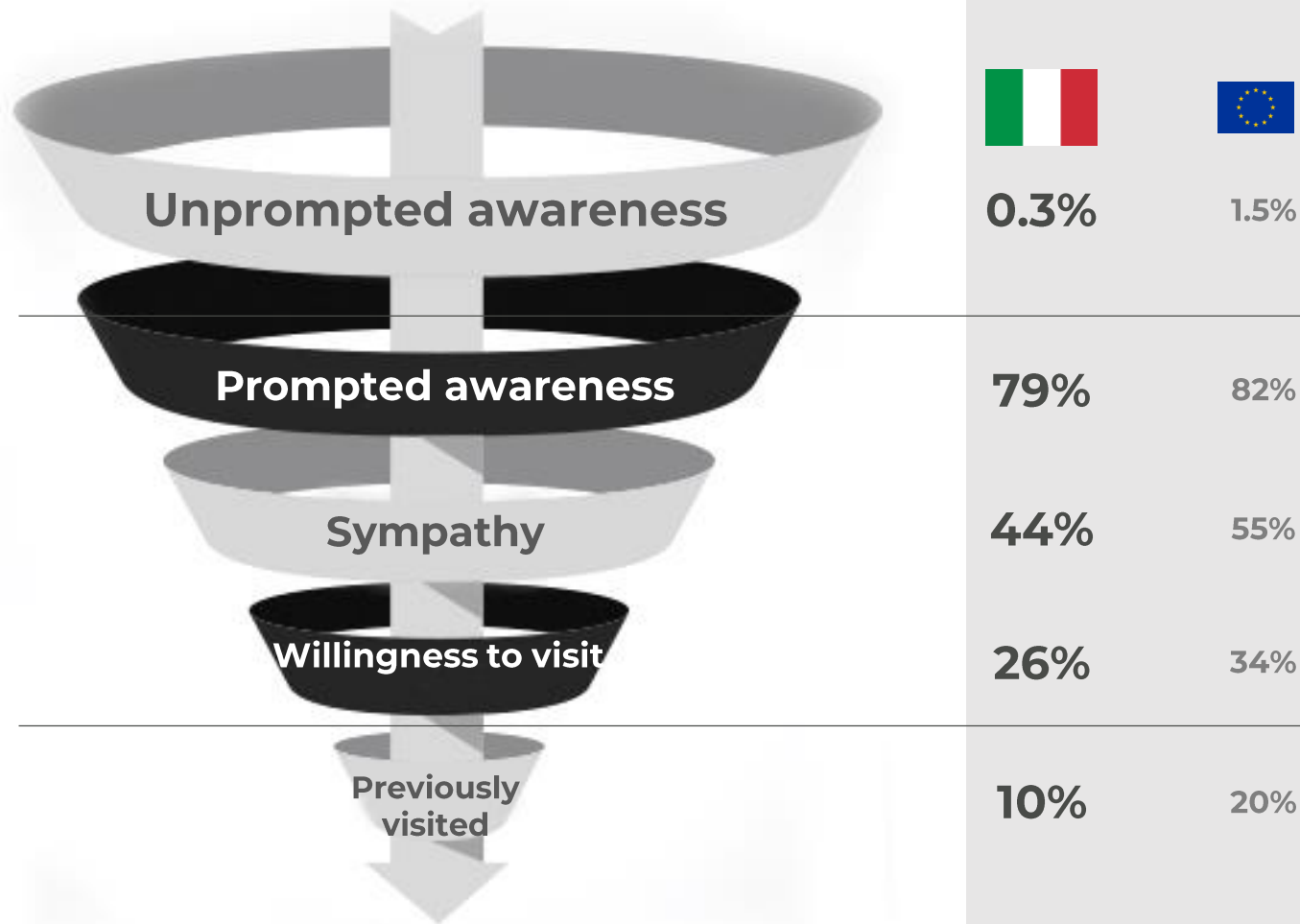


# **Brand strength & Growth potential**



# Brand Funnel 2022

Assessing Luxembourg's brand strength as a destination

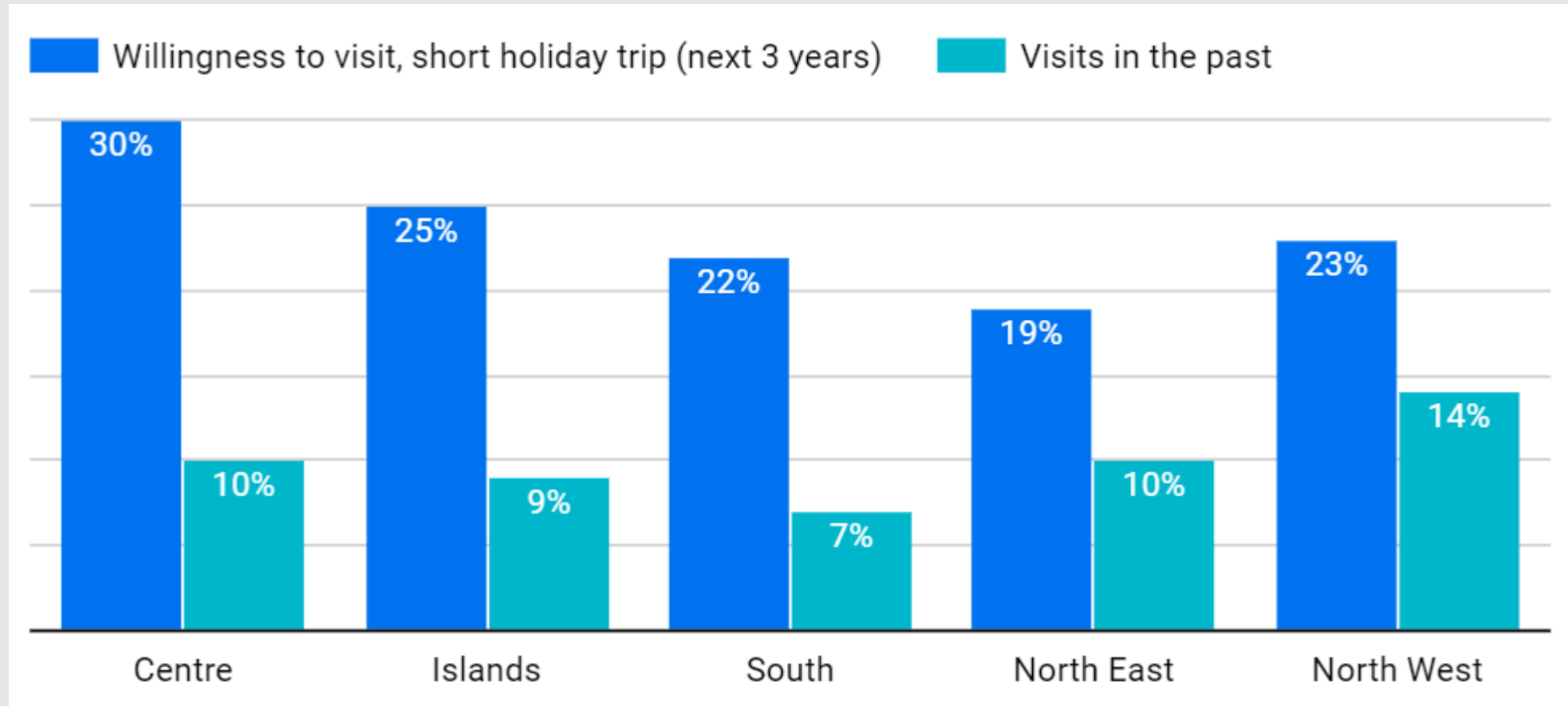


**Total future visitor potential from Italy (\*)**  
12.0 million

Source: Destination Brand/Inspektour.  
(\*) Based on travel intent for next 3 years.


# Regional origin 2022

## Past visitors and future potential





# General theme interest (\*)

Theme			
	Rank	Rank	% interested
City	4	1	80%
Castles	5	2	73%
Culinary	2	3	72%
Nature	3	4	72%
Resting/Relaxation	1	5	67%
History/Unesco	7	6	65%
Culture	6	7	61%
Hiking	8	8	55%
Sustainability	9	9	52%
Nightlife (**)	12	10	50%
Events	14	11	46%
Countryside	15	12	42%
Shopping	10	13	41%
Family	11	14	40%
Active-sports	16	15	38%
Wellness	13	16	36%
Industrial heritage	17	17	34%
Cycling	18	18	30%
MTB	19	19	19%
Motorcycling	20	20	19%

(\*) 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
<b>City</b>	1	<b>1</b>	34%
<b>Castles</b>	6	<b>2</b>	32%
<b>Culture</b>	5	<b>3</b>	27%
<b>Resting/Relaxation</b>	2	<b>4</b>	25%
<b>Hiking</b>	9	<b>5</b>	23%
<b>History/Unesco</b>	10	<b>6</b>	22%
<b>Nature</b>	4	<b>7</b>	22%
<b>Cycling</b>	13	<b>8</b>	20%
<b>Nightlife (***)</b>	11	<b>9</b>	18%
<b>Shopping</b>	8	<b>10</b>	18%
<b>Culinary</b>	3	<b>11</b>	18%
<b>Wellness</b>	12	<b>12</b>	16%
<b>Family</b>	7	<b>13</b>	14%
<b>Active-sports</b>	14	<b>14</b>	13%
<b>MTB</b>	15	<b>15</b>	12%

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

- Culinary
- Resting/relaxation
- Family
- Shopping
- Nature

(\*) 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).

# Luxembourg's Brand Value Ratings (\*)



Feature			
	Rank	<b>Rank</b>	% agreeing
<b>Service-oriented</b>	5	<b>1</b>	26%
<b>Welcoming, hospitable</b>	1	<b>2</b>	23%
<b>Sustainable</b>	10	<b>3</b>	23%
<b>Attractive, appealing</b>	4	<b>4</b>	23%
<b>Open-minded, tolerant</b>	3	<b>5</b>	22%
<b>Authentic</b>	2	<b>6</b>	22%
<b>Surprising</b>	6	<b>7</b>	22%
<b>Not crowded, insider tip</b>	9	<b>8</b>	20%
<b>Lot of variety, diversified</b>	7	<b>9</b>	20%
<b>Lively, hip</b>	8	<b>10</b>	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





## Your contact



**Alain Krier**

*Head of Insights & Strategy*

T. +352 42 82 82 36

[alain.krier@LfT.lu](mailto:alain.krier@LfT.lu)



**Luxembourg for Tourism GIE**  
6, rue Antoine de Saint-Exupéry  
L-1432 Luxembourg-Kirchberg  
[www.visitluxembourg.com](http://www.visitluxembourg.com)