Luxembourg for Tourism

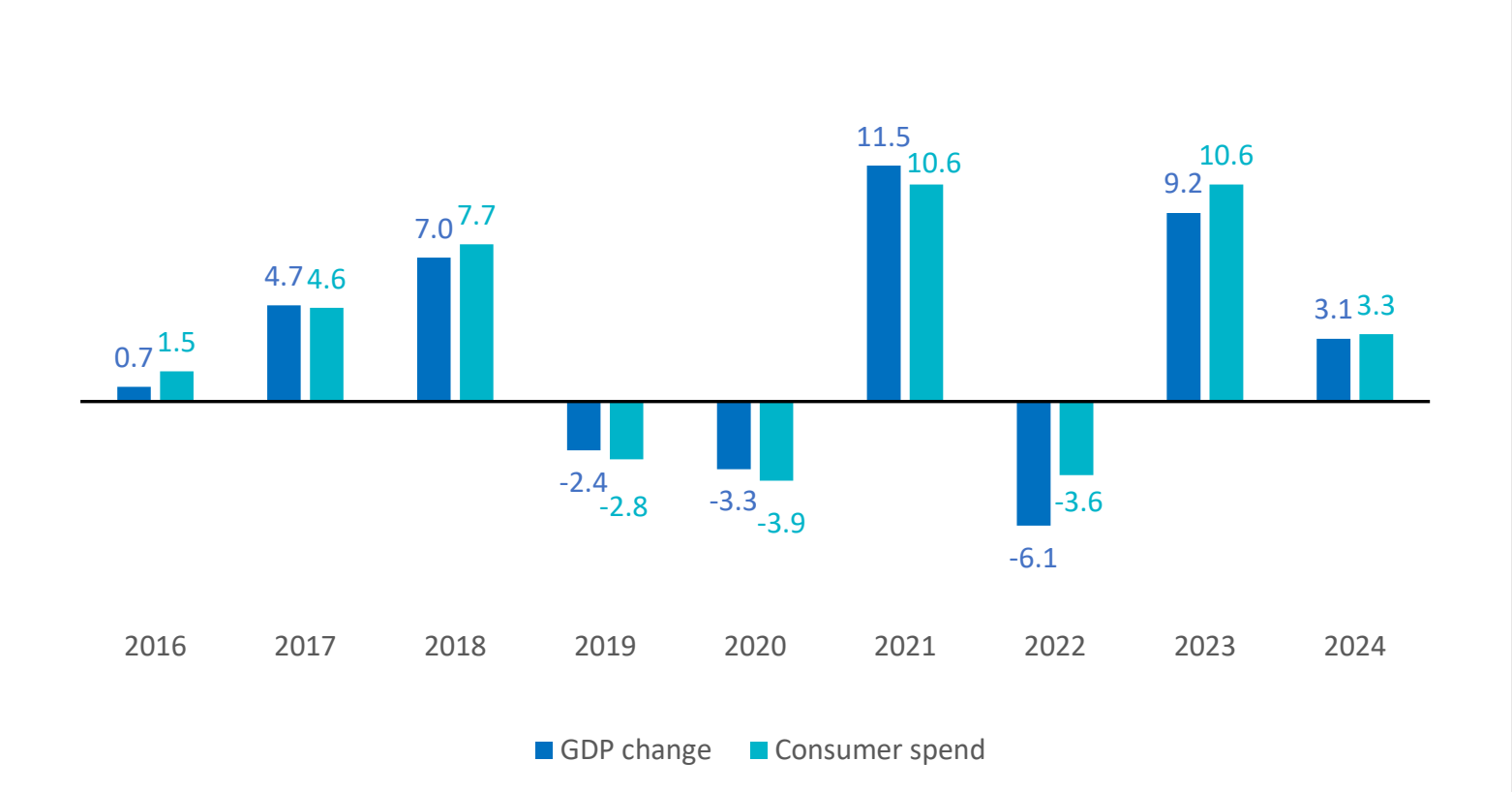
# Market profile FRANCE 2024

©Photo by Rodrigo Kugnharski on Unsplash

# Economic indicators & General Travel Demand

# Economic indicators – General travel demand

## GDP and consumer spending, % annual change




## Economy & population

**GDP ($) per capita**
**46,116.99**

**Unemployment (%)**
**7.15**

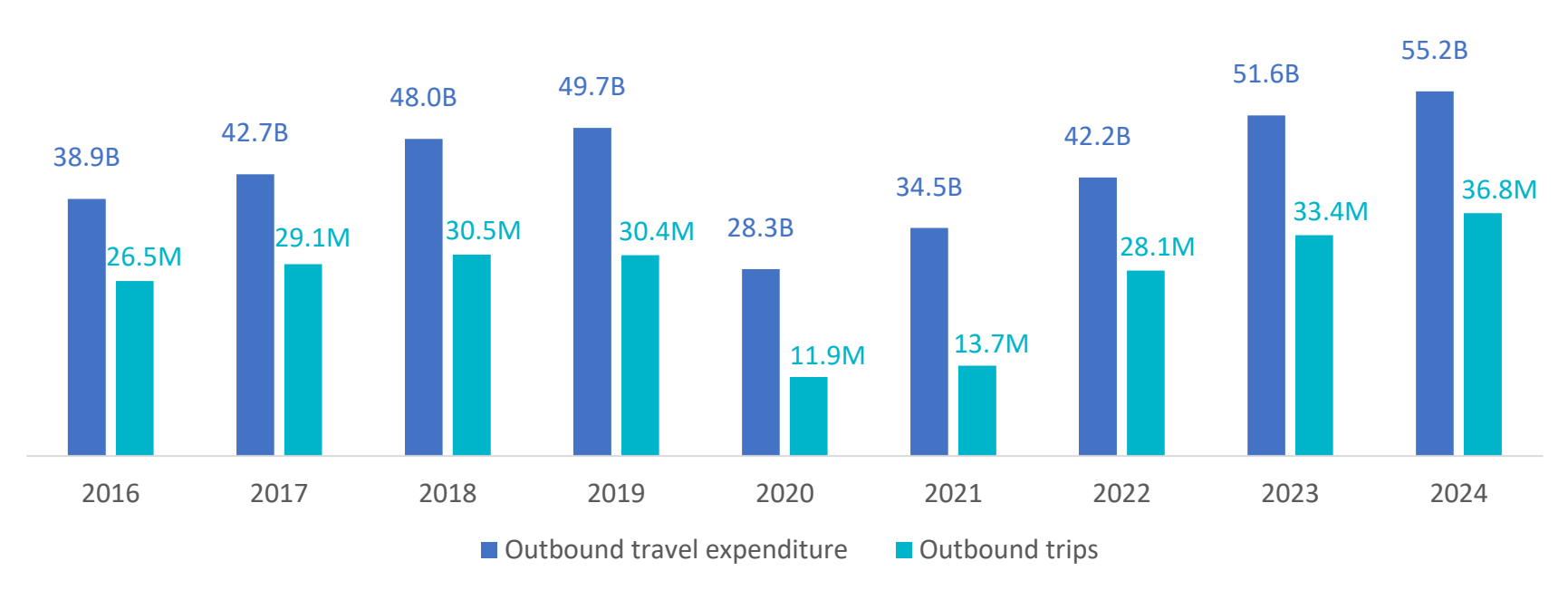
**Inflation(%)**
**2.00**

**Population**
**68,553,210**

Sources: Oxford Economics.

# Economic indicators – General travel demand

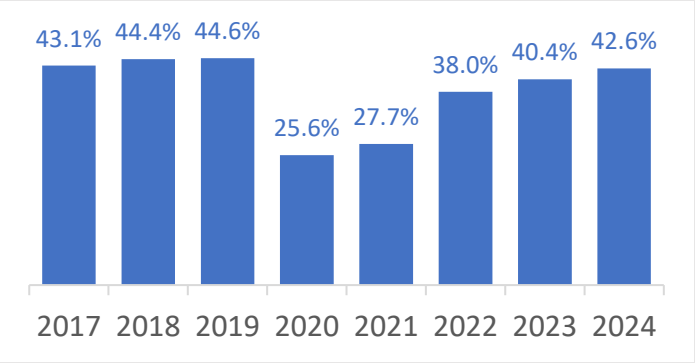
## Outbound trips and travel expenditure




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

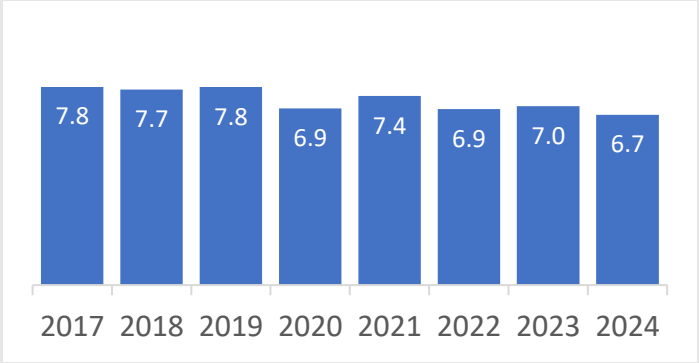
**Average spend**
**per outbound trip (2024)**
**1,502 $**

## Share of outbound travel, % all nights




**Share of leisure,**
**% all outbound trips**
**(2024)**
**85.6%**

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




**Share of short trips**
**(1-3 nights),**
**% all outbound**
**trips (2024)**
**36.3%**

Sources: Eurostat, Oxford Economics.

# Arrivals & nights in paid accommodation

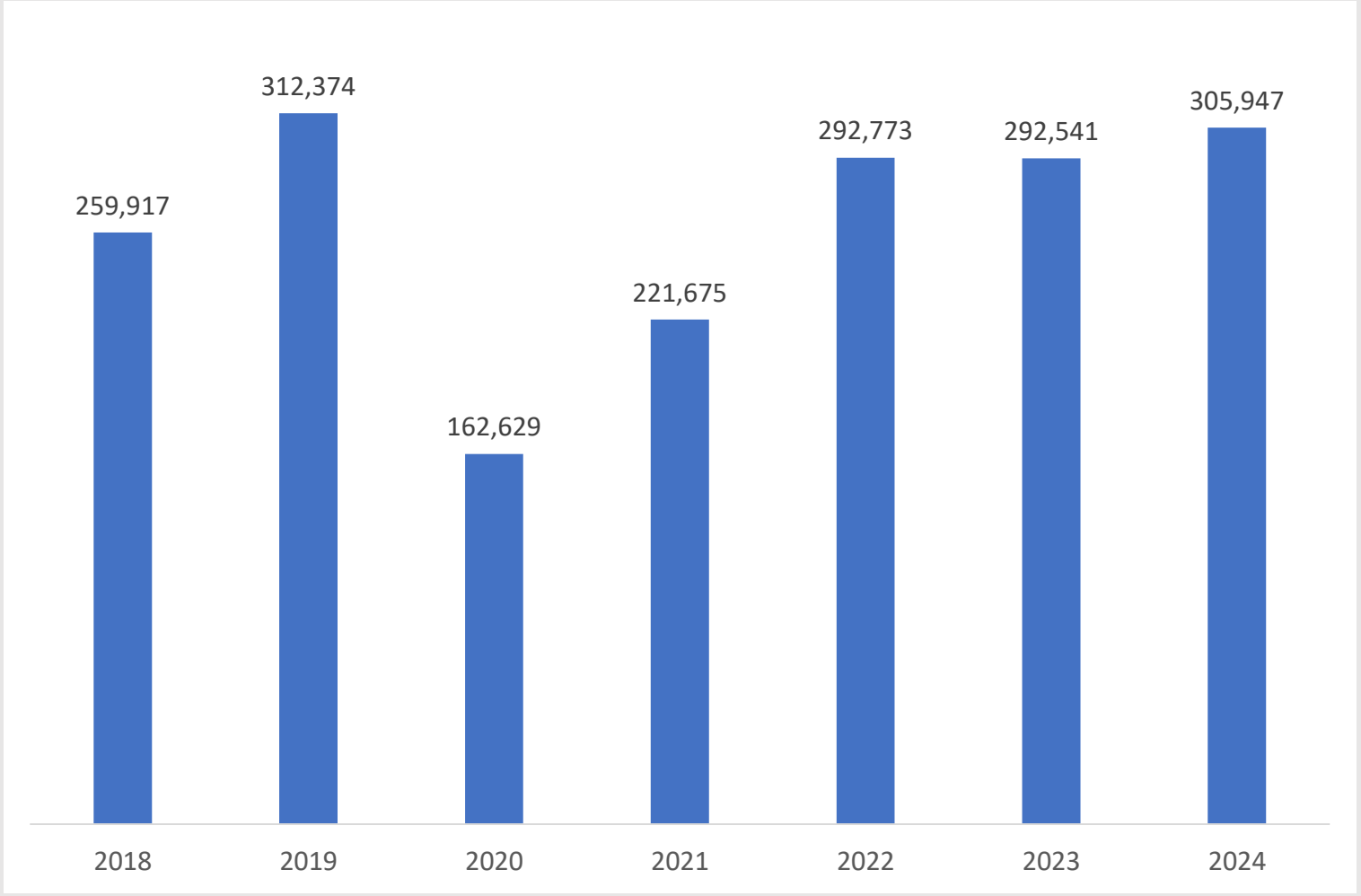
# Nights in paid accommodation

## 2024 and 2018-2024

**Nights,**
**paid accommodation, 2024**

**+5% (vs. 2023)**

**-2% (vs. 2019)**




Source: Statec

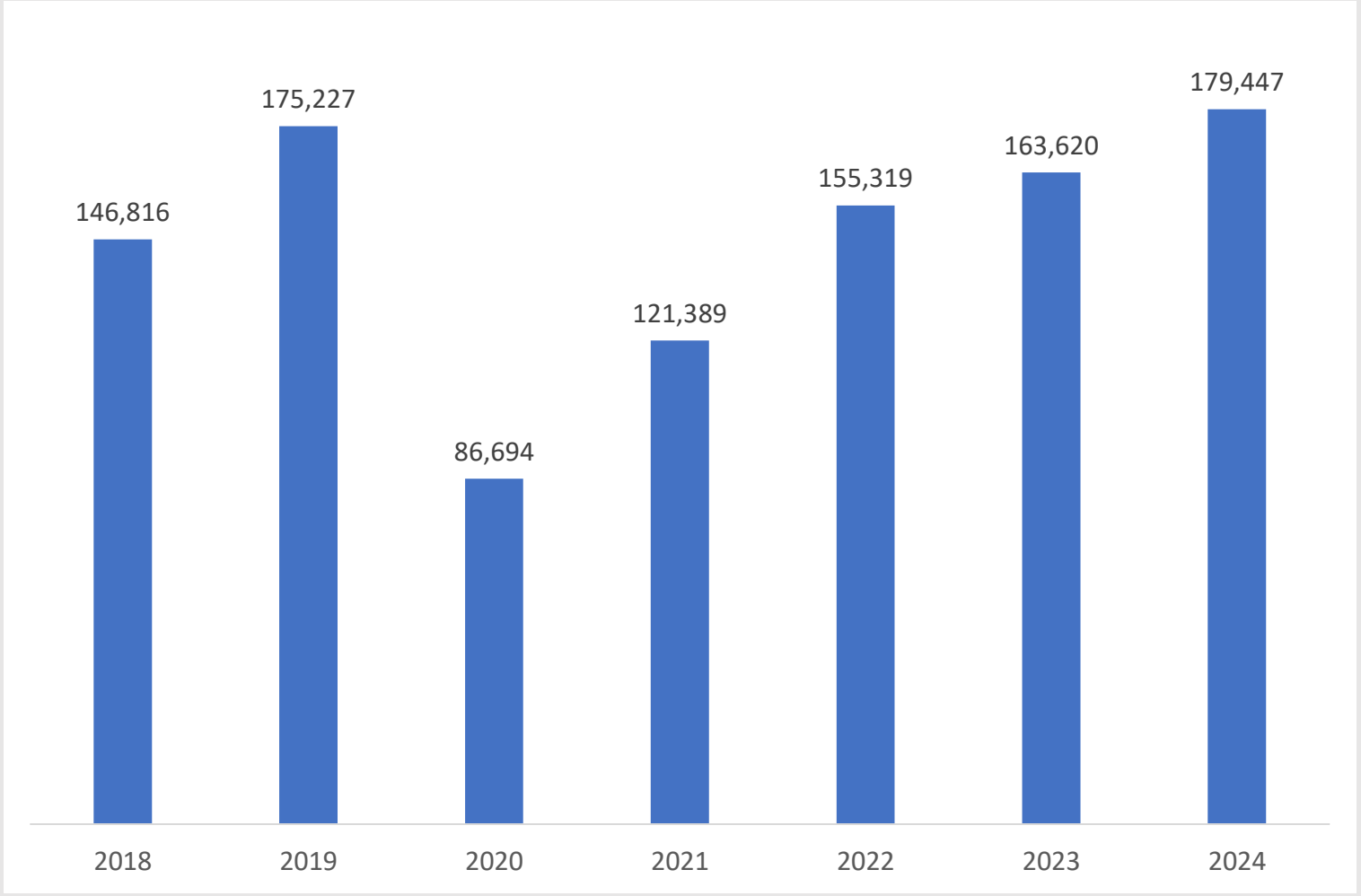
# Arrivals in paid accommodation

## 2024 and 2018-2024

**Arrivals,**
**paid accommodation, 2024**

**+10% (vs. 2023)**

**+2% (vs. 2019)**




Source: Statec

# Length of stay, paid accommodation

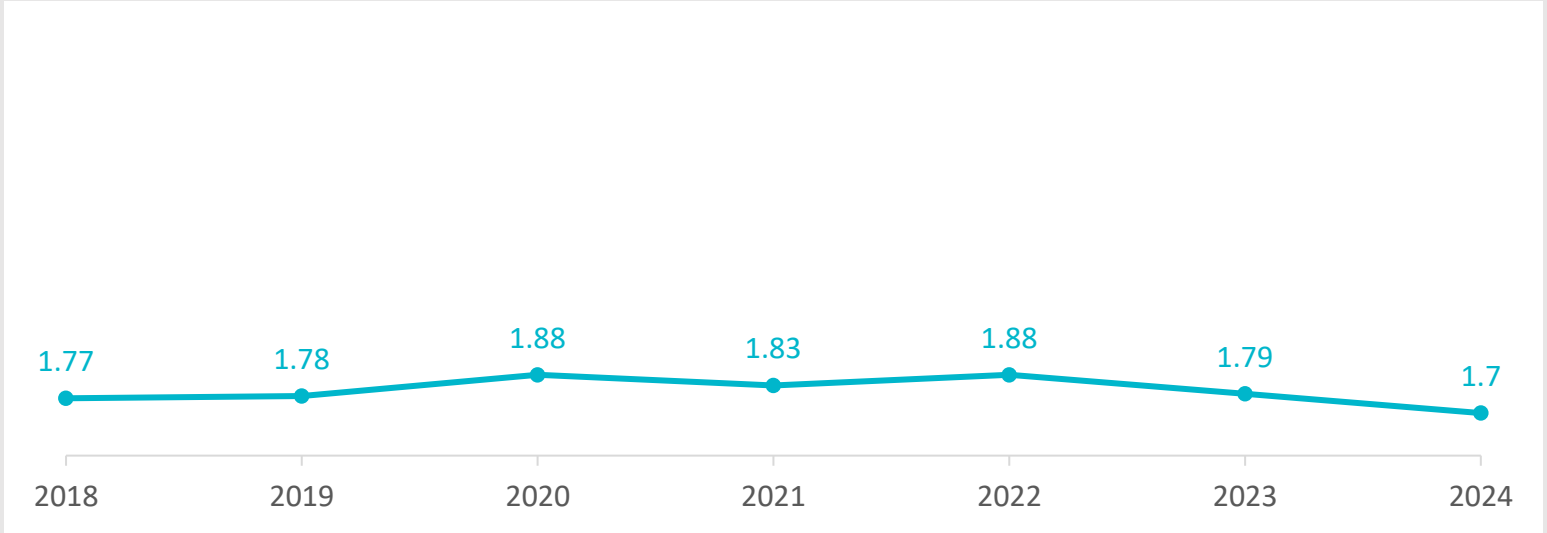
2024 and 2018-2024

**Average length of stay, paid accommodation, 2024**

**1.7 nights**

**-0.09 nights (vs. 2023)**

**-0.08 nights (vs. 2019)**

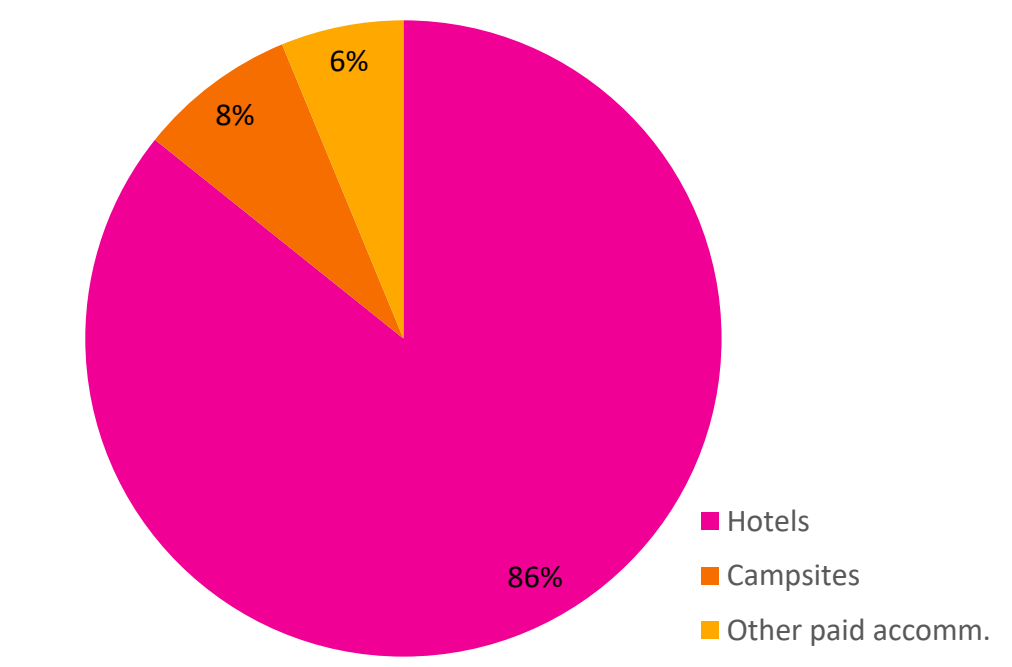



Source: Statec

# Nights & arrivals in paid accommodation

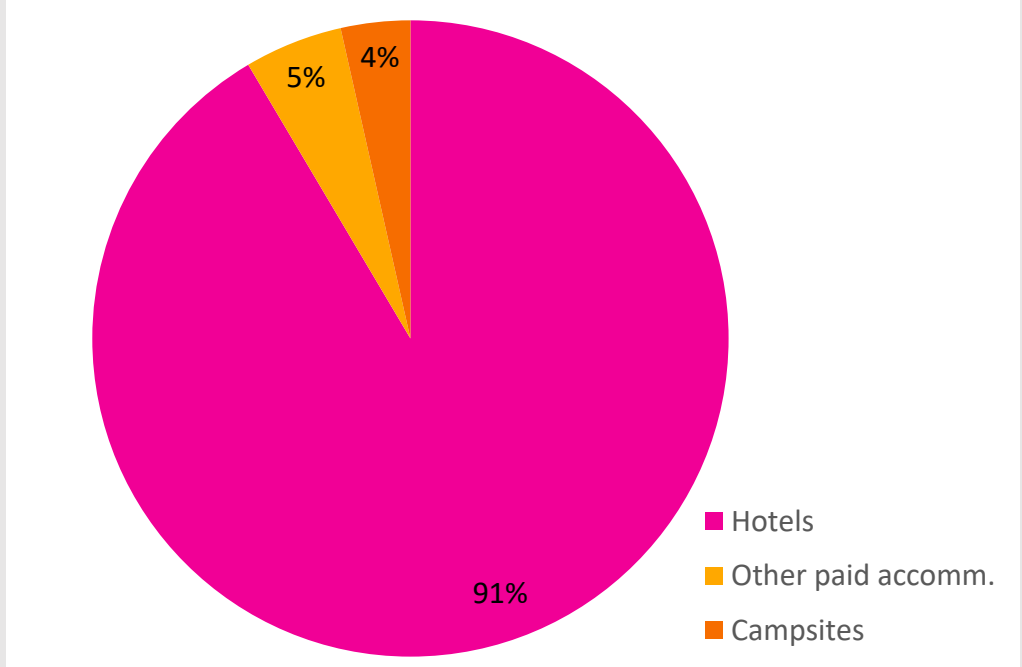
## Type of accommodation, 2024

### Nights, paid accommodation, 2024




| | | | |
|---|---|---|---|
| Hotels | 262.311 | +7% (vs. 2023) | -1% (vs. 2019) |
| Campsites | 24.580 | -22% (vs. 2023) | -7% (vs. 2019) |
| Other paid accomm. | 19.056 | +20% (vs. 2023) | -10% (vs. 2019) |

### Arrivals, paid accommodation, 2024



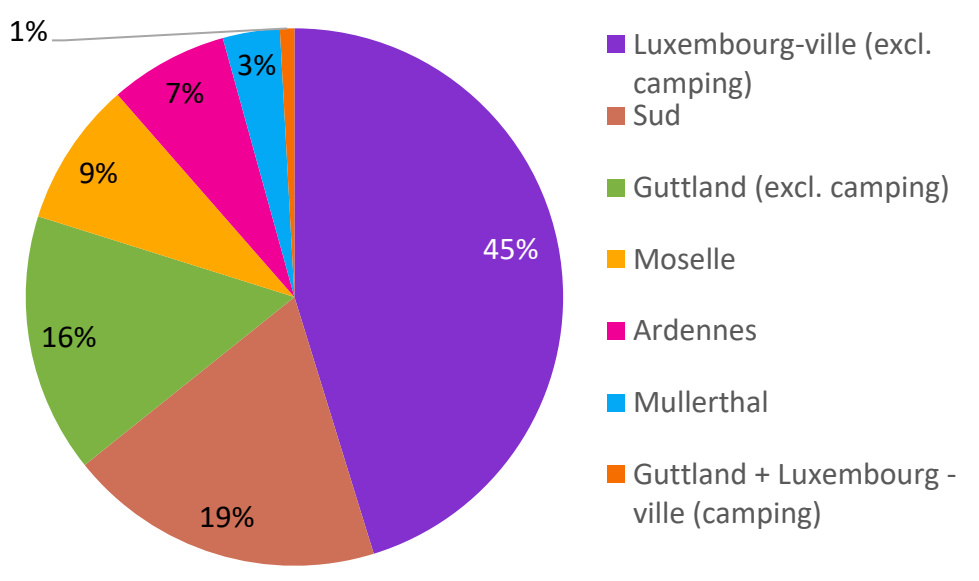

| | | | |
|---|---|---|---|
| Hotels | 164.168 | +10% (vs. 2023) | +3% (vs. 2019) |
| Other paid accomm. | 8.956 | +12% (vs. 2023) | -13% (vs. 2019) |
| Campsites | 6.323 | +10% (vs. 2023) | +9% (vs. 2019) |

Source: Statec

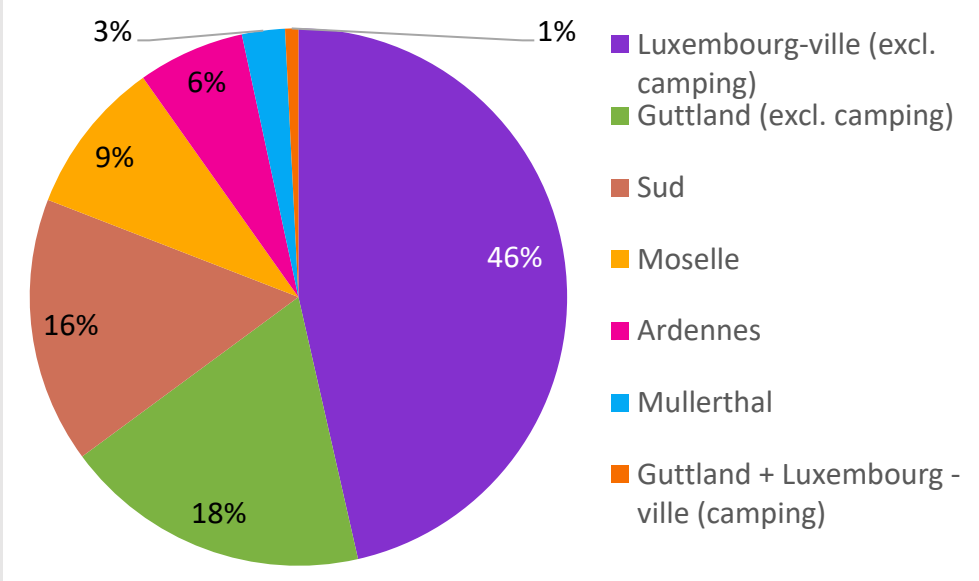
# Nights & arrivals in paid accommodation

## Regions, 2024

### Nights, paid accommodation, 2024




### Arrivals, paid accommodation, 2024




| | | | |
|---|---|---|---|
| Lux.-City (excl. camping) | 138.377 | +6% (vs. 2023) | -11% (vs. 2019) |
| South | 58.201 | +0% (vs. 2023) | +22% (vs. 2019) |
| Guttland (excl. camping) | 47.736 | +10% (vs. 2023) | +20% (vs. 2019) |
| Moselle | 26.656 | +19% (vs. 2023) | -6% (vs. 2019) |
| Eislek | 21.827 | -15% (vs. 2023) | -12% (vs. 2019) |
| MPSL | 10.498 | +30% (vs. 2023) | -15% (vs. 2019) |
| Guttland/Lux.-City (camping) | 2.652 | -29% (vs. 2023) | -25% (vs. 2019) |

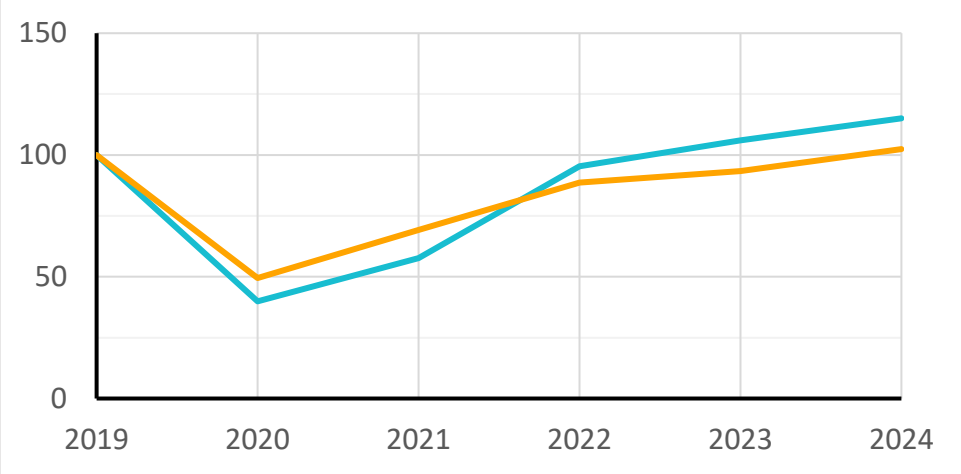
| | | | |
|---|---|---|---|
| Lux.-City (excl. camping) | 83.329 | +6% (vs. 2023) | -10% (vs. 2019) |
| Guttland (excl. camping) | 33.110 | +6% (vs. 2023) | +36% (vs. 2019) |
| South | 28.714 | +18% (vs. 2023) | +25% (vs. 2019) |
| Moselle | 16.692 | +26% (vs. 2023) | +9% (vs. 2019) |
| Eislek | 11.534 | +10% (vs. 2023) | -13% (vs. 2019) |
| MPSL | 4.642 | +19% (vs. 2023) | -16% (vs. 2019) |
| Guttland/Lux.-City (camping) | 1.426 | -18% (vs. 2023) | -13% (vs. 2019) |

Source: Statec

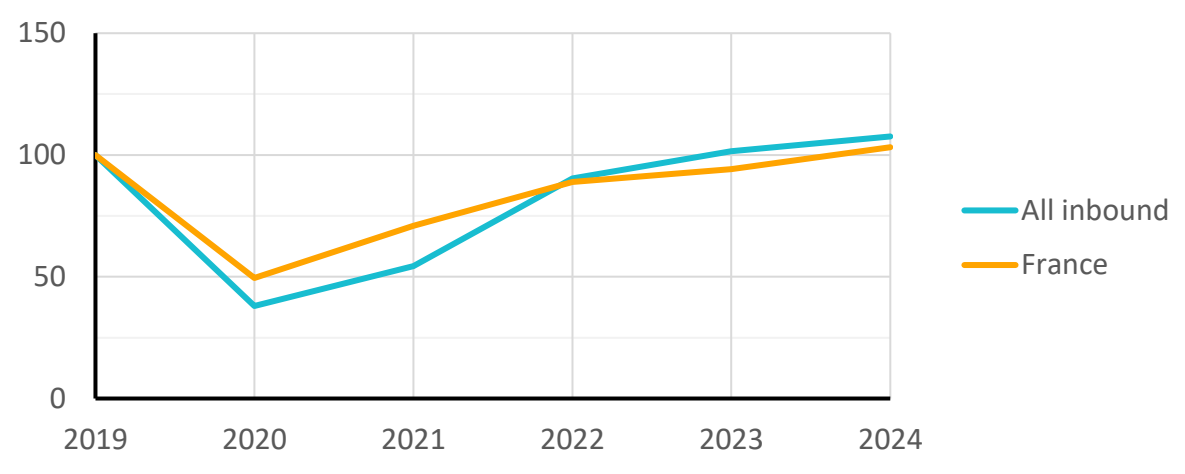
# Arrivals in paid accommodation

## Trends 2019-2024

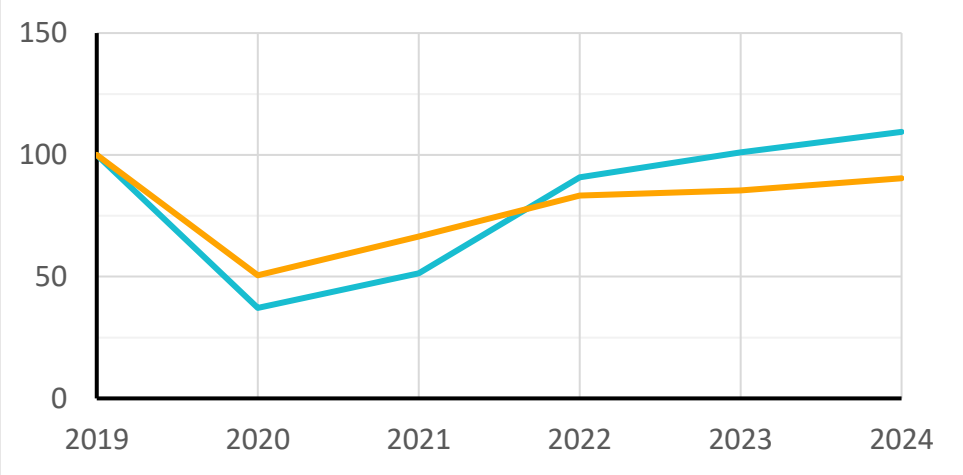
### All paid accommodation, national (2019 = Index 100)




### Hotels, national (2019 = Index 100)




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

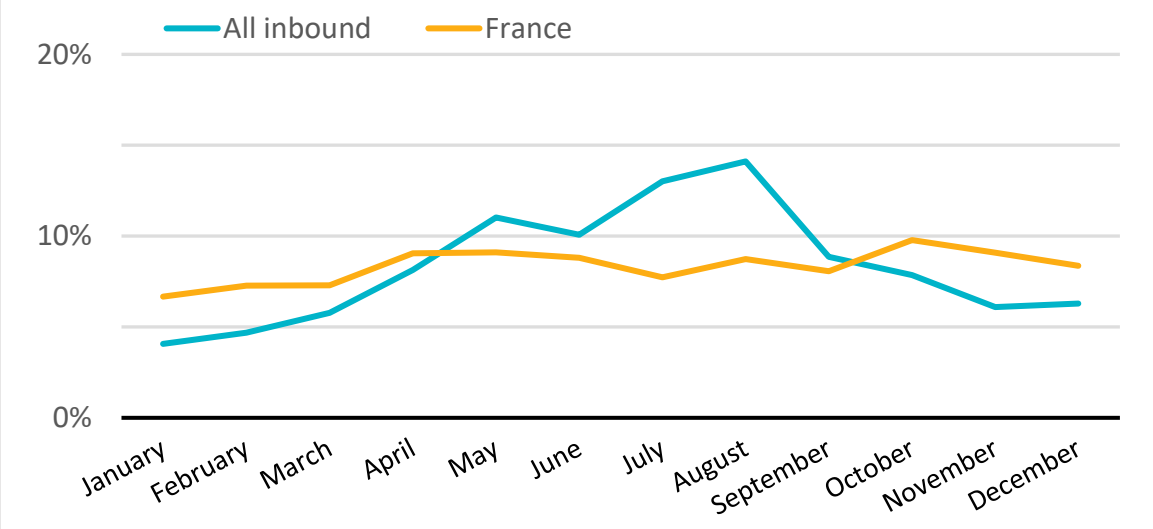



(*) excluding camping.
Source: Statec

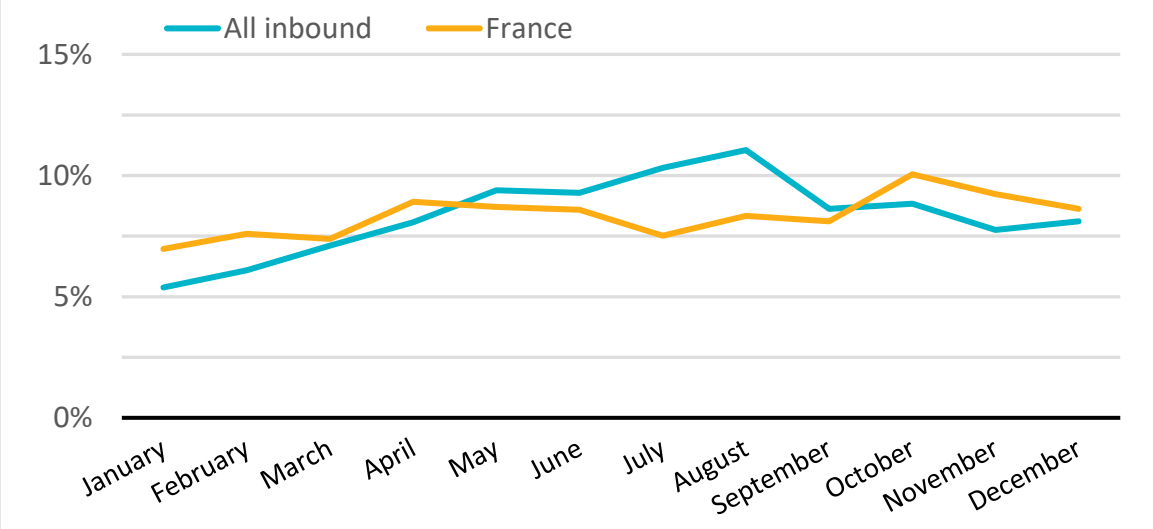
# Arrivals in paid accommodation

## Seasonality

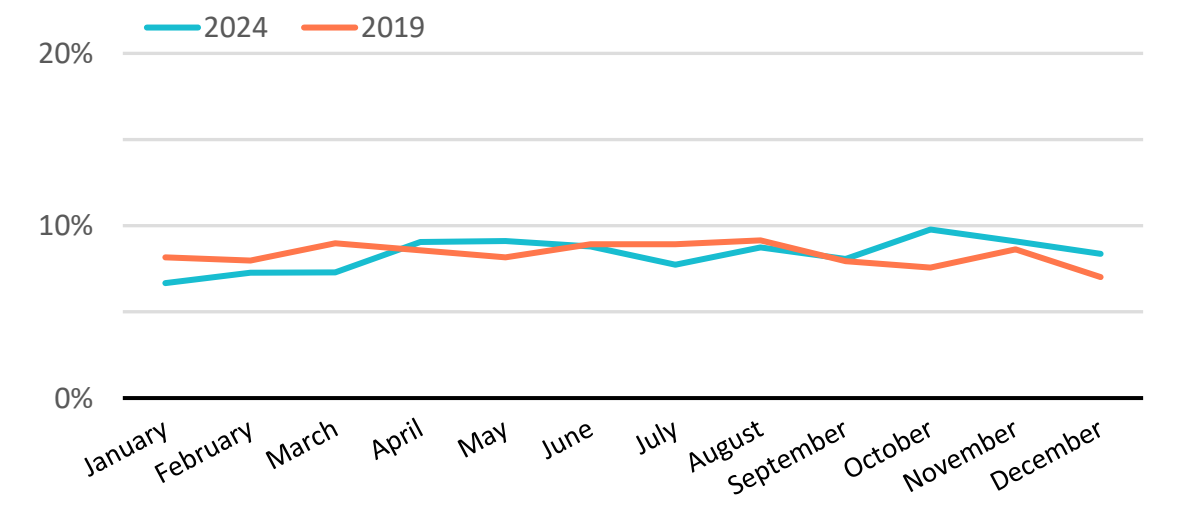
### All paid accommodation, 2024




### Hotels, 2024




### All paid accommodation, arrivals from France




Source: Statec

# Short-term rentals

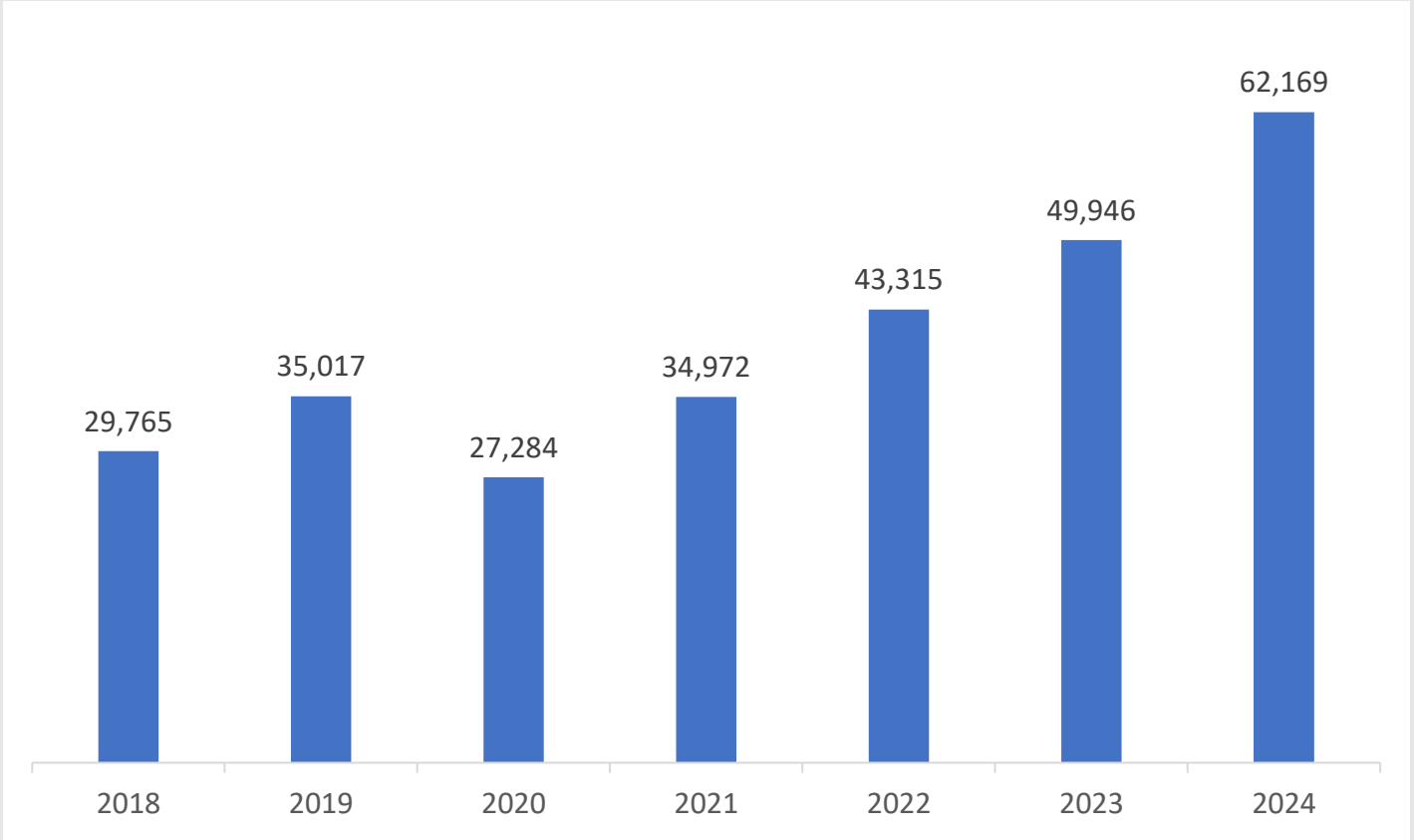
## 2024 and 2018-2024

**Nights,**
**Short-term rentals, 2024**

**24% (vs. 2023)**

**78% (vs. 2019)**

**Nights,**
**Short-term rentals, 2018-2024**



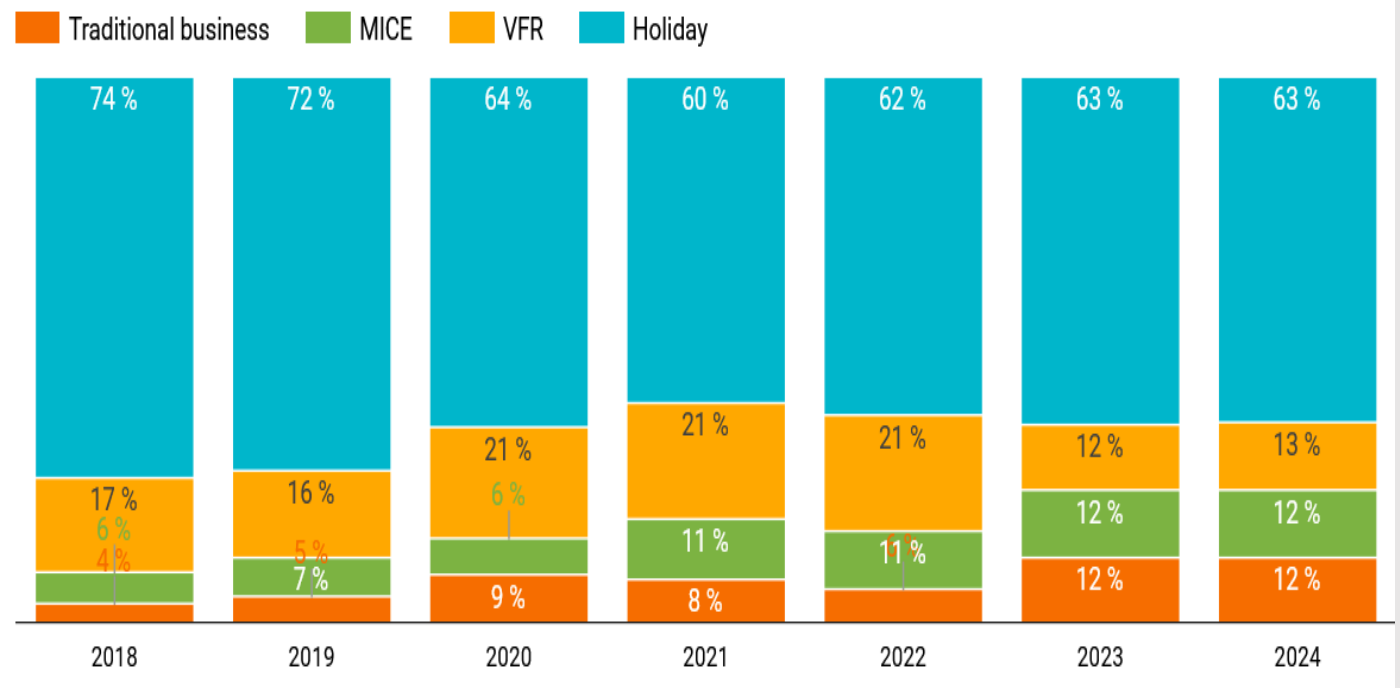

Source: Eurostat (experimental statistics).

# Characteristics of inbound trips

# French trips to Luxembourg with overnight (all accommodation)

## Purpose of visit, 2018-2024

**French trips to Luxembourg, 2018-2024**




**2024**

| | France to Luxembourg | Europe to Luxembourg |
|---|---|---|
| Holiday | 63% | 61% |
| VFR | 13% | 15% |
| MICE | 12% | 15% |
| Traditional Business | 12% | 8% |

Source: World Travel Monitor/IPK International.

# Inbound same-day trips to Luxembourg

2024

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

891.000

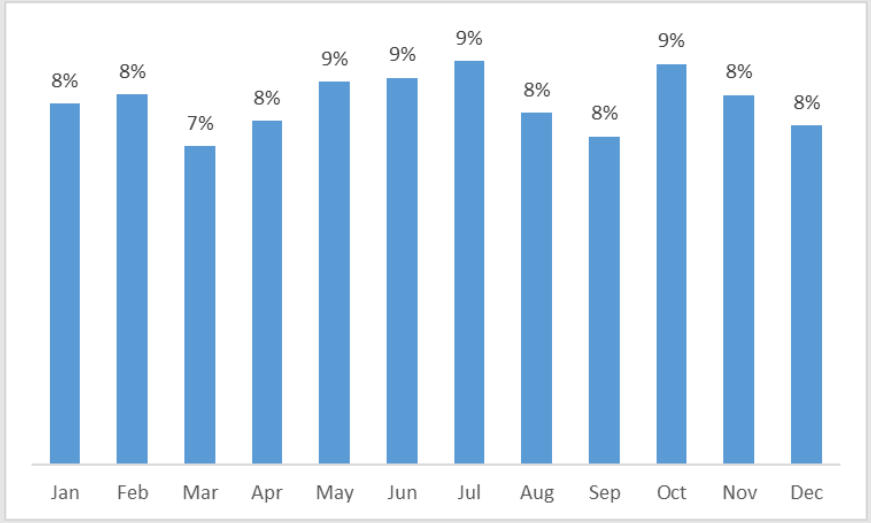
**-14% (vs. 2023)**

**Average length of same-day trips**

7,1 h

**-0,1 h (vs. 2023)**

**Seasonality**
**% of same-day trips**

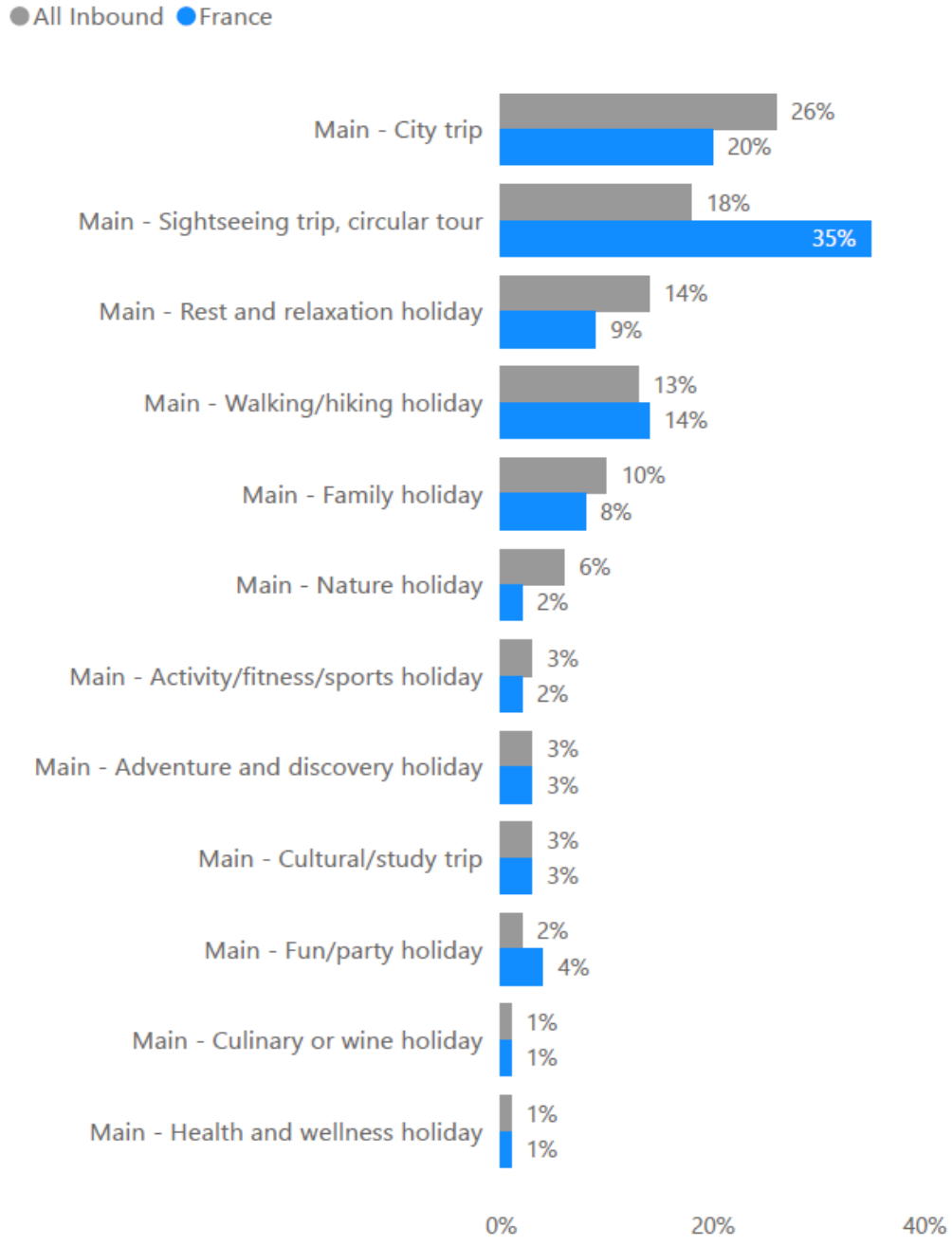



Sources: LFT estimates, Mobile phone data (Editus/LFT), LFT/Ilres Visitor Survey.

# Travel behaviour of inbound leisure visitors

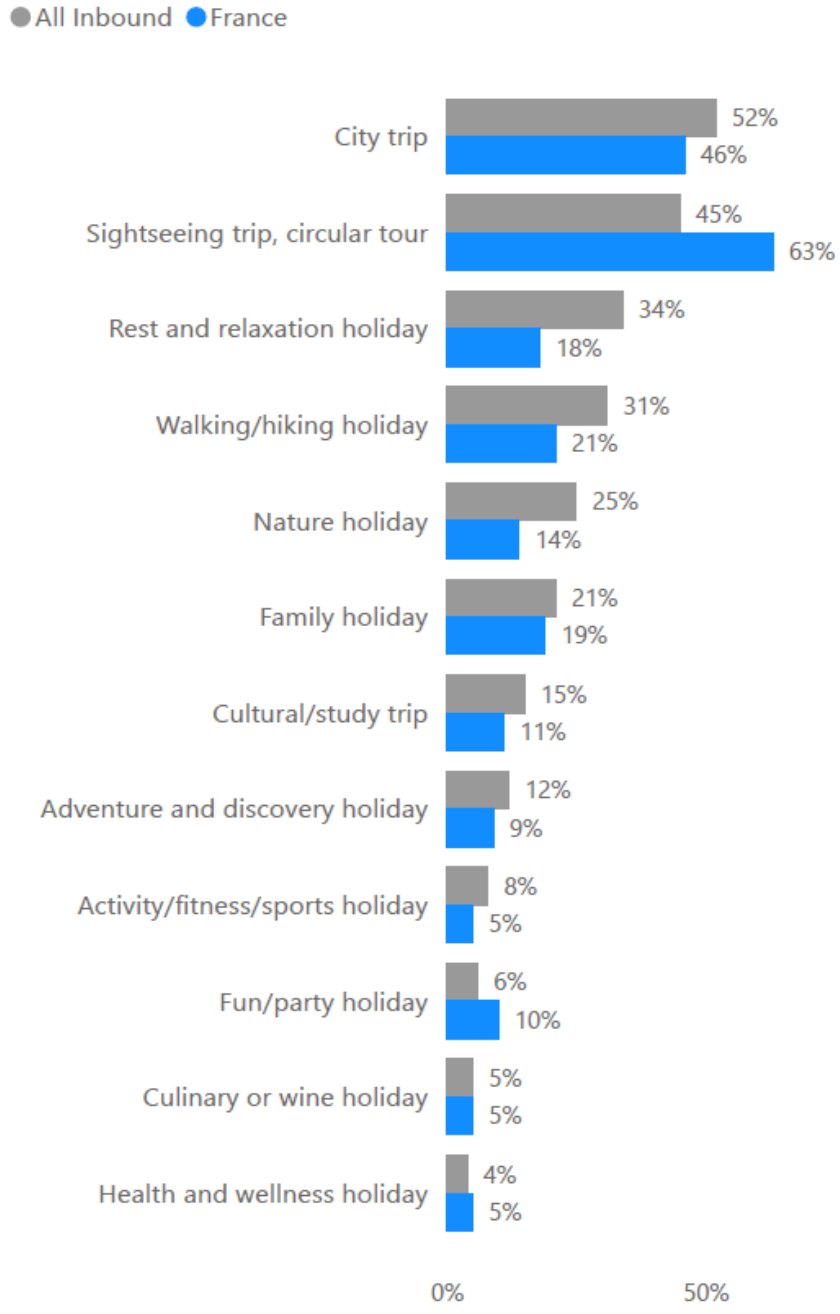
## Main holiday types

**Visitors with overnight**



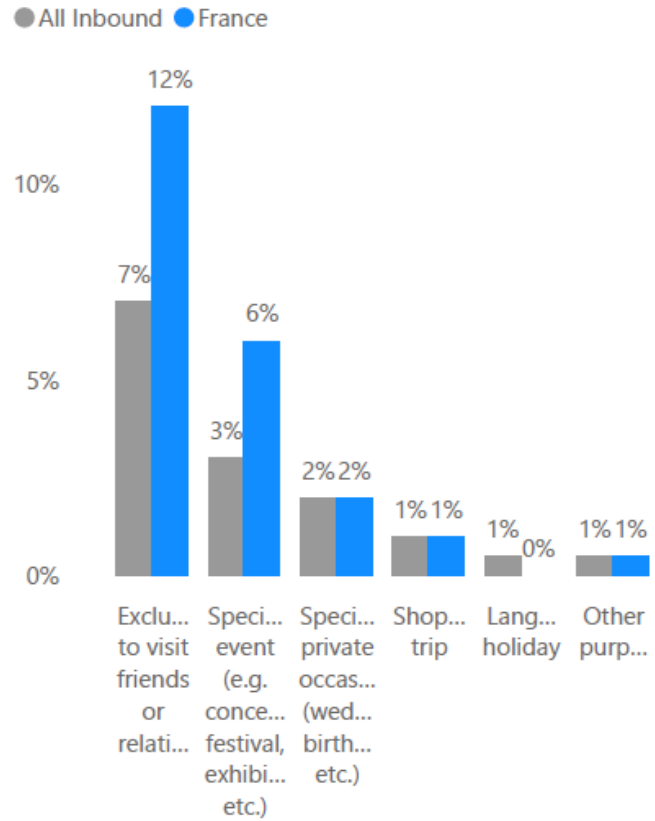

## All holiday types

**Visitors with overnight**



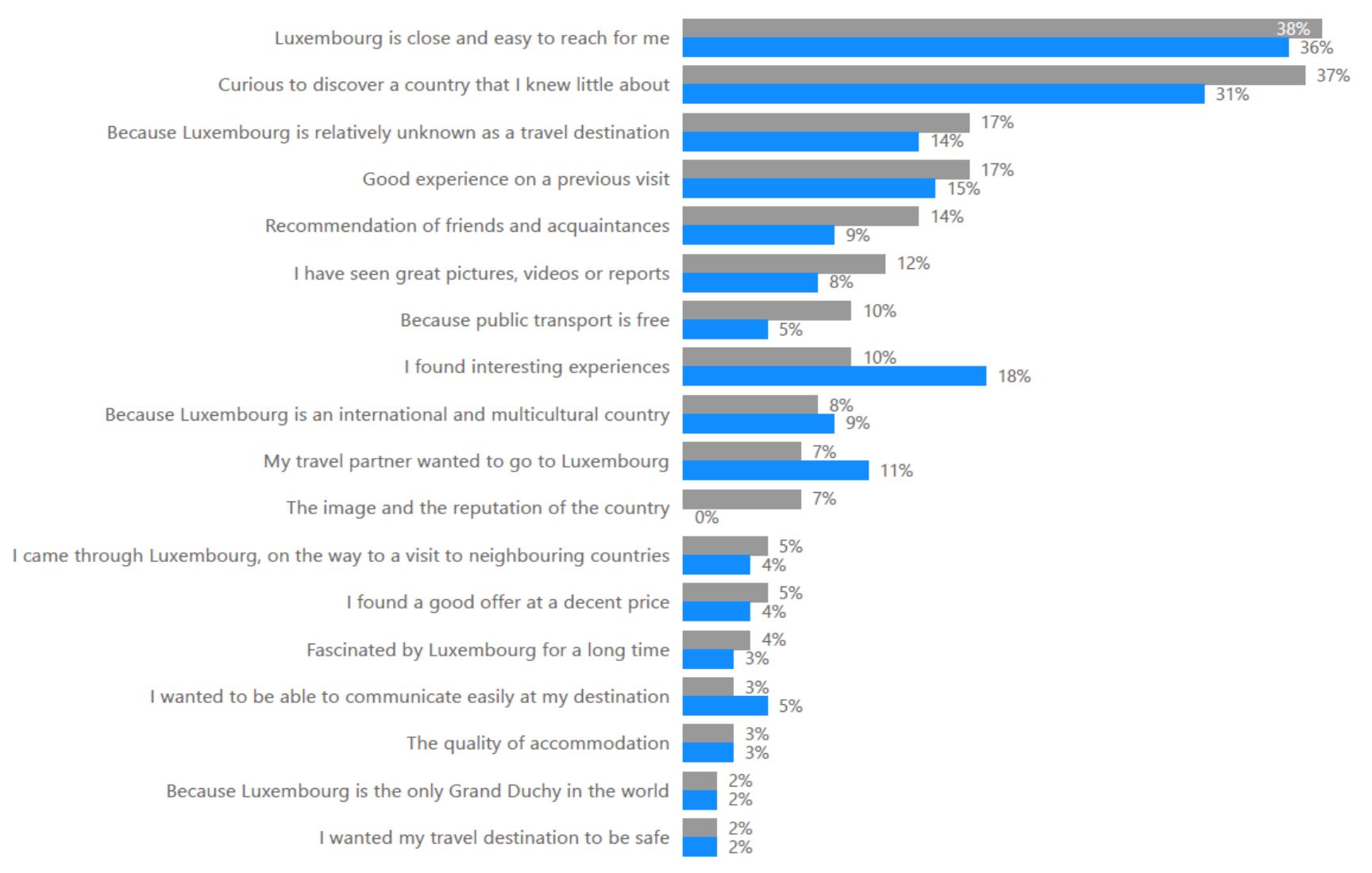

## Main purpose of overnight trip

**(if not holiday)**



# Key decision criteria for choosing Luxembourg

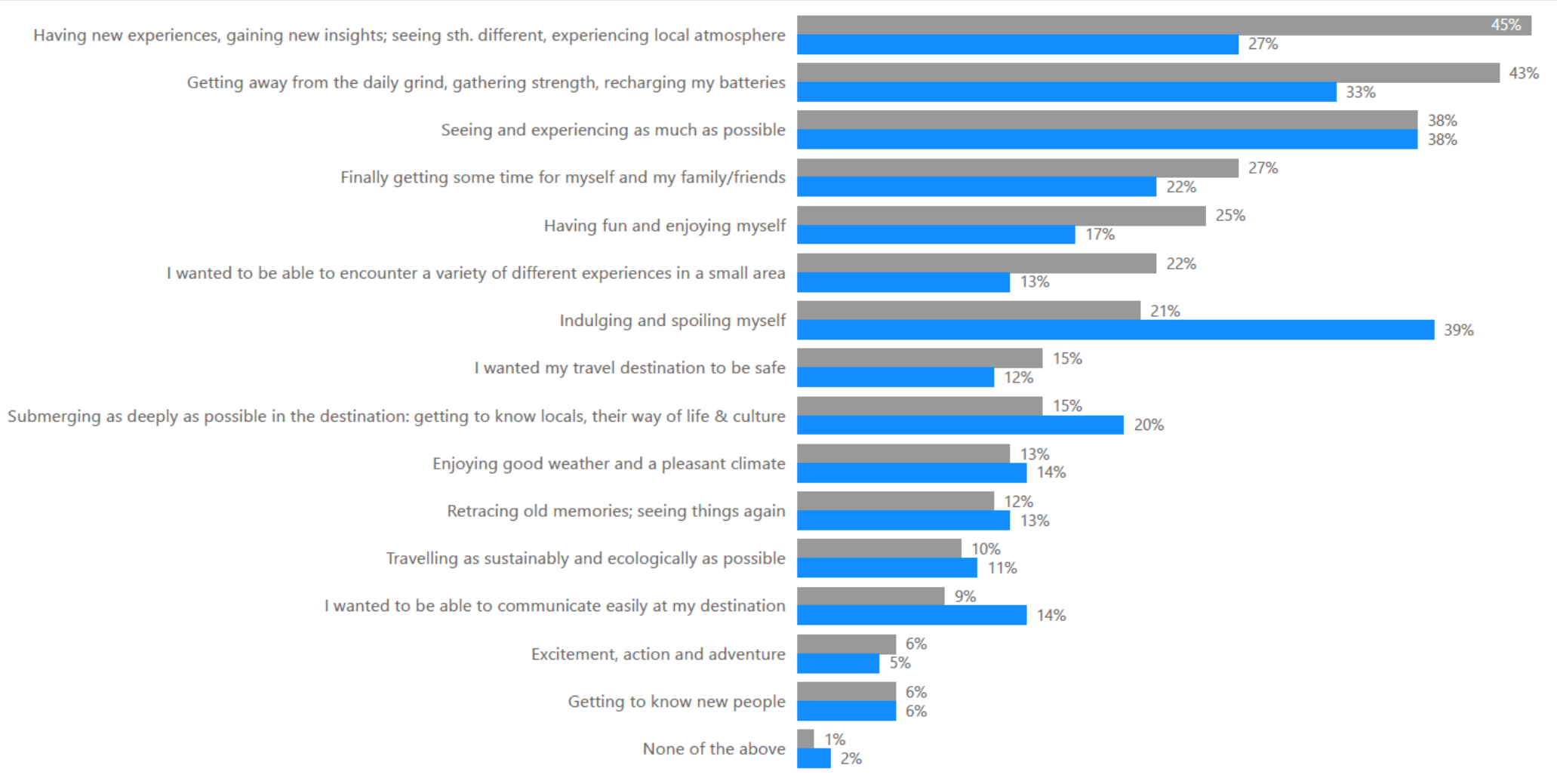
## Inbound leisure visitors with overnight (*), 2023-2024




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

# Key travel motives

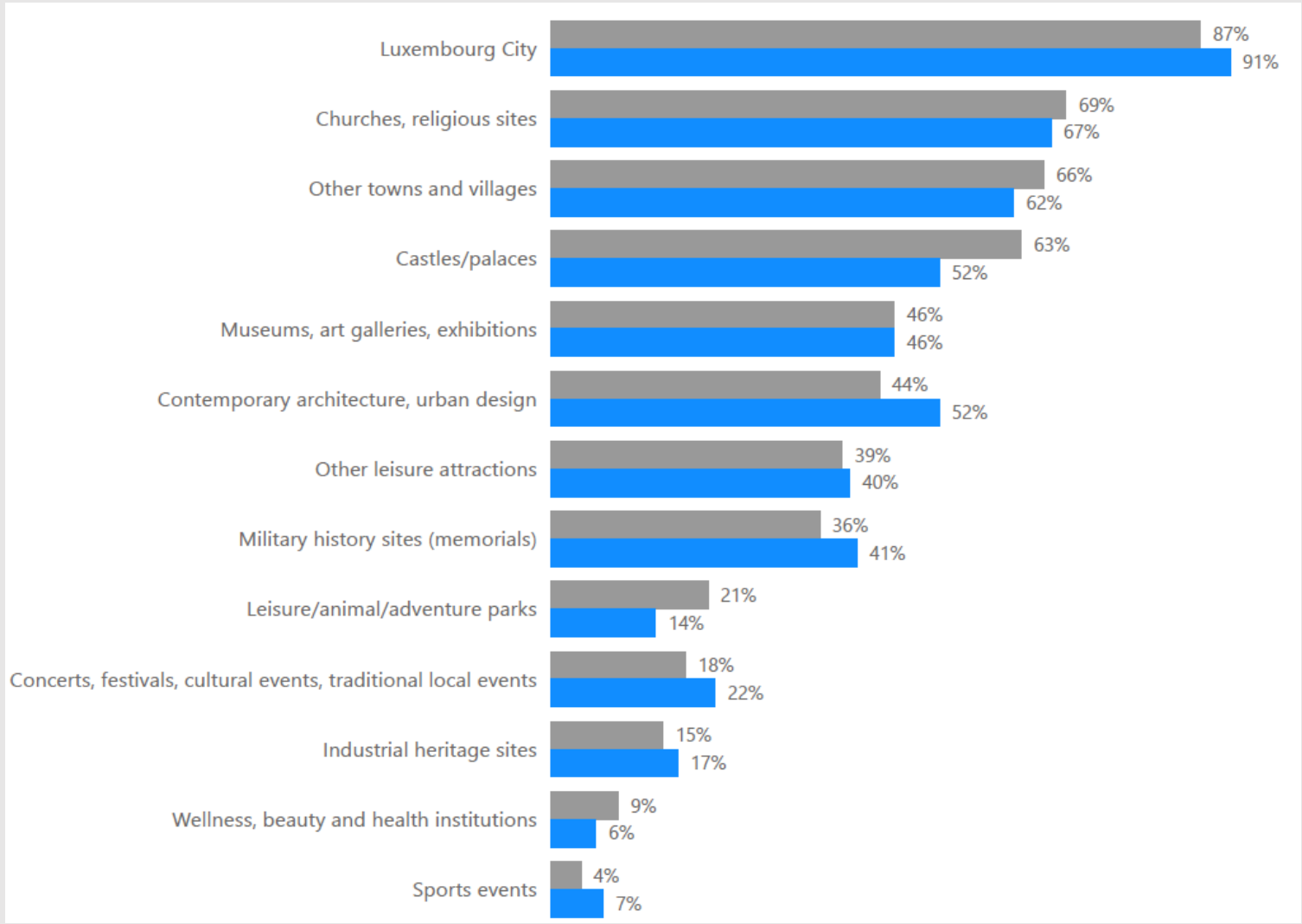
## Inbound leisure visitors with overnight, 2023-2024




Source: LFT/Ilres Visitor Survey.

# Type of places visited in Luxembourg

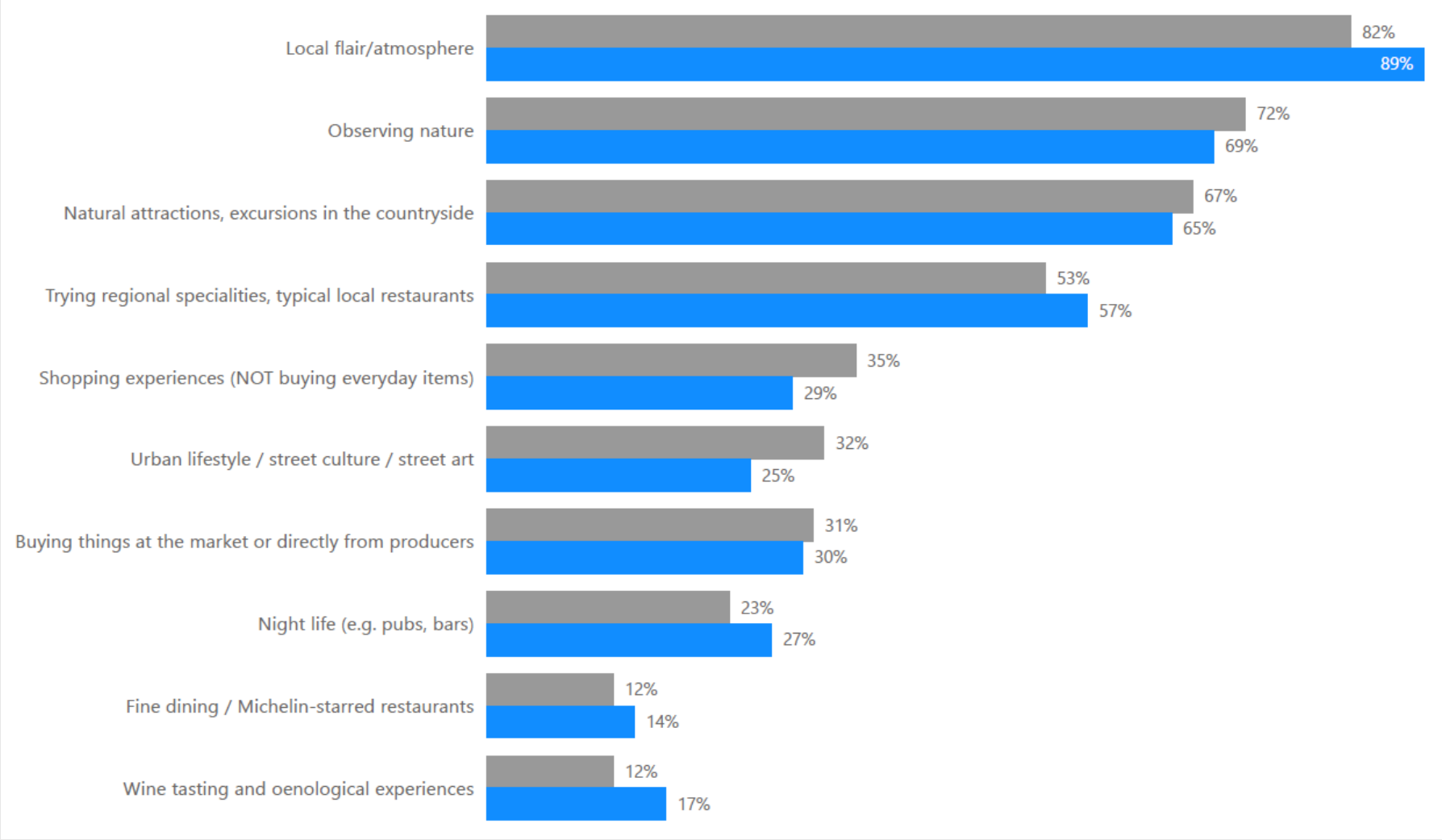
## Inbound leisure visitors with overnight, 2023-2024




Source: LFT/Ilres Visitor Survey.

# Non-sporting activities undertaken in Luxembourg

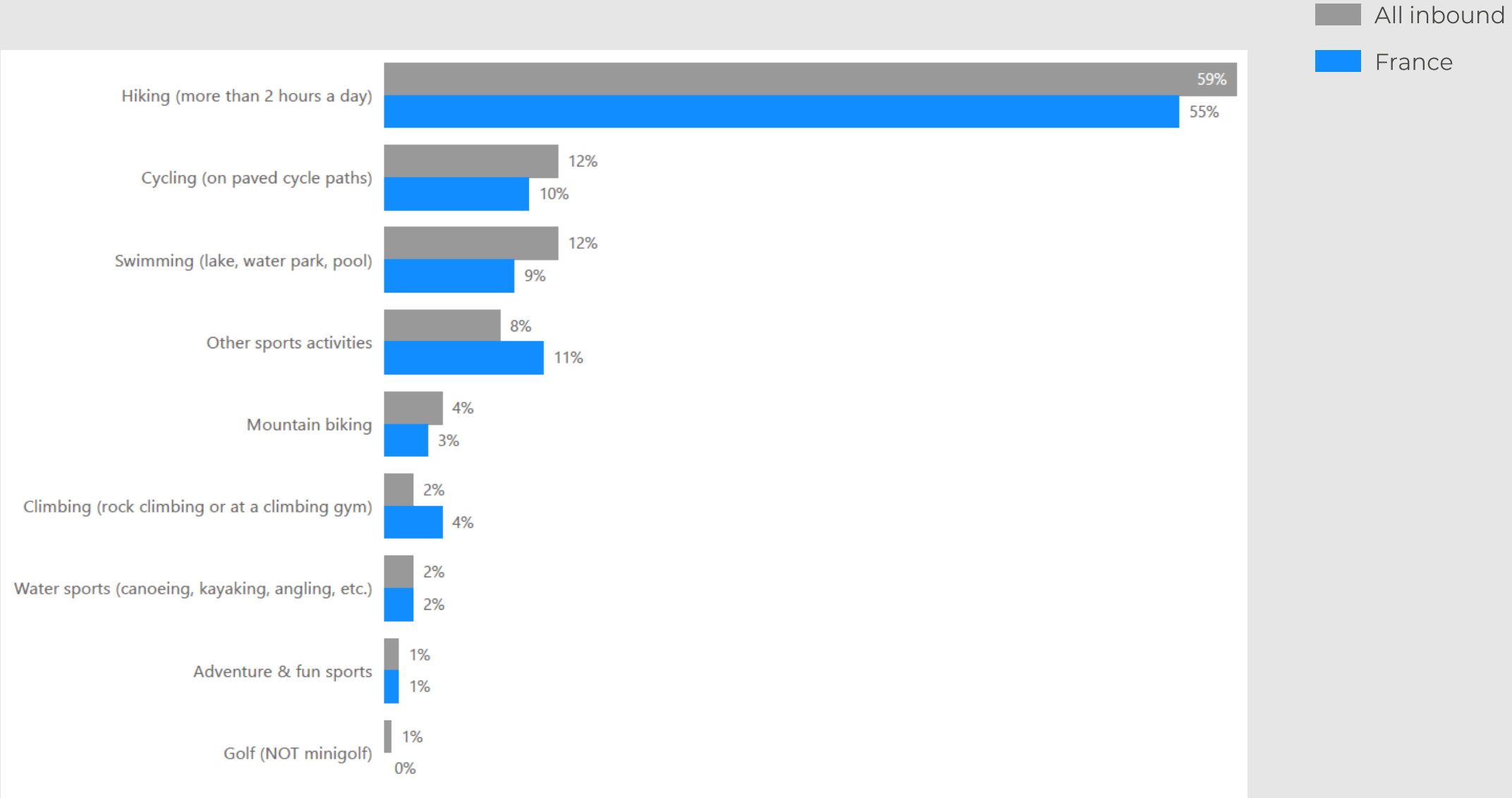
## Inbound leisure visitors with overnight, 2023-2024




Source: LFT/Ilres Visitor Survey.

# Sporting activities undertaken in Luxembourg

## Inbound leisure visitors with overnight, 2023-2024

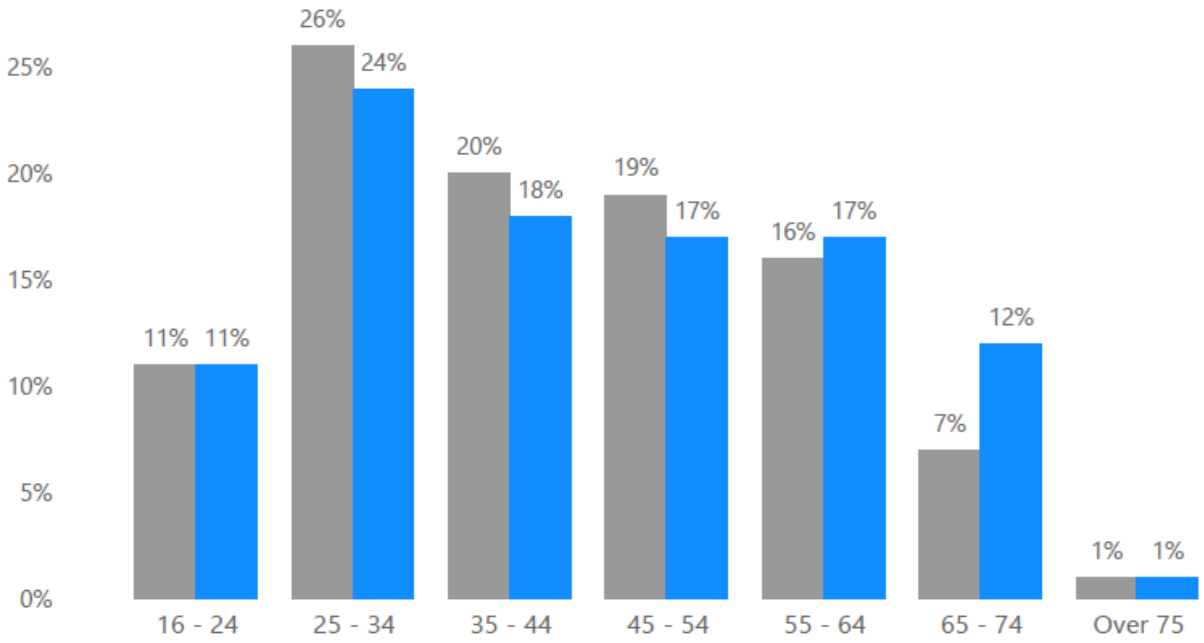


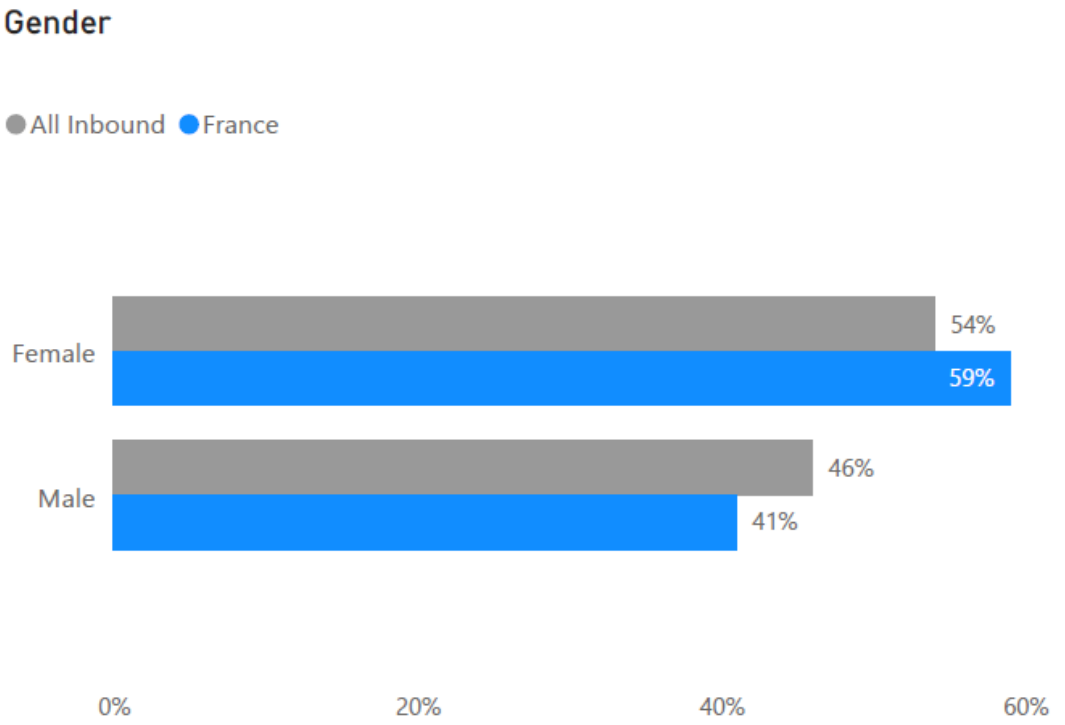

Source: LFT/Ilres Visitor Survey.

# Age groups

## Inbound leisure visitors with overnight, 2023-2024

All inbound
France

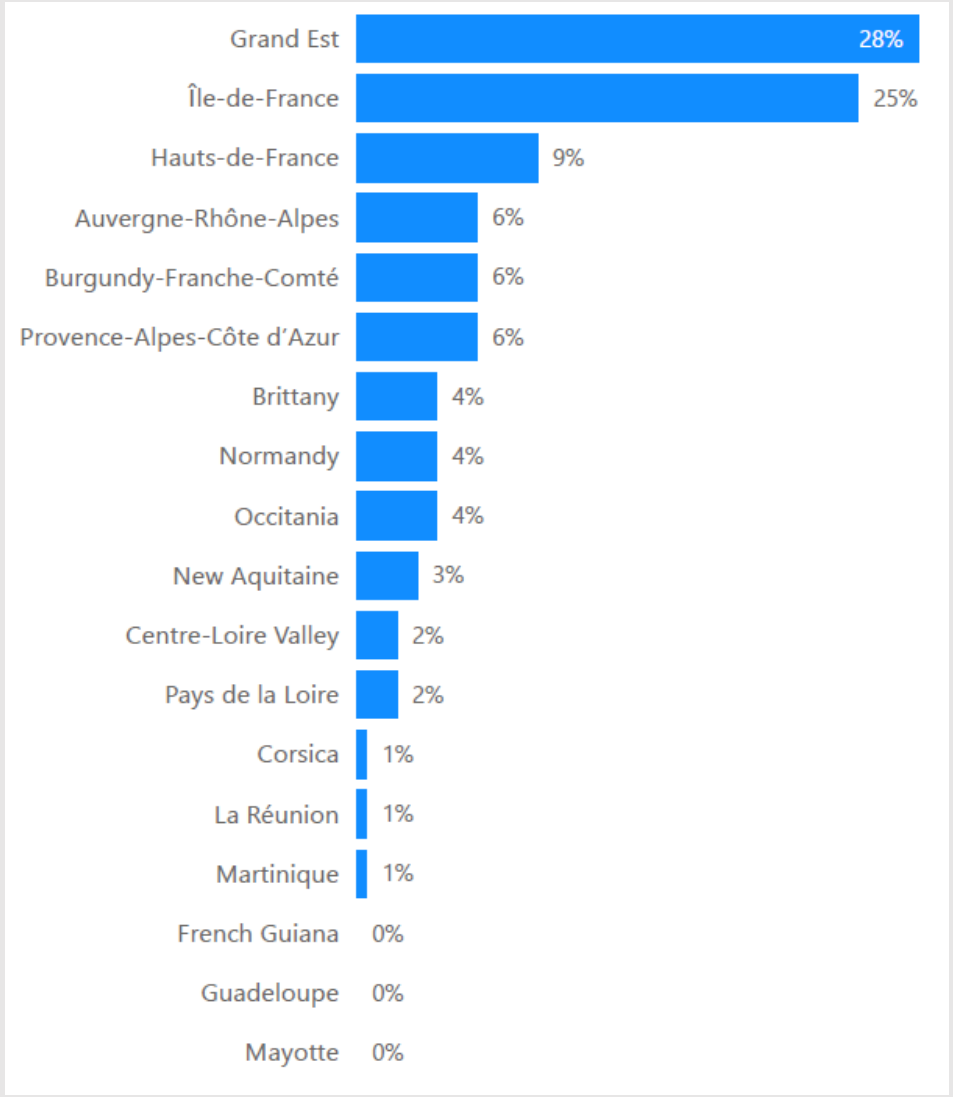



Source: LFT/Ilres Visitor Survey.

# Region of origin

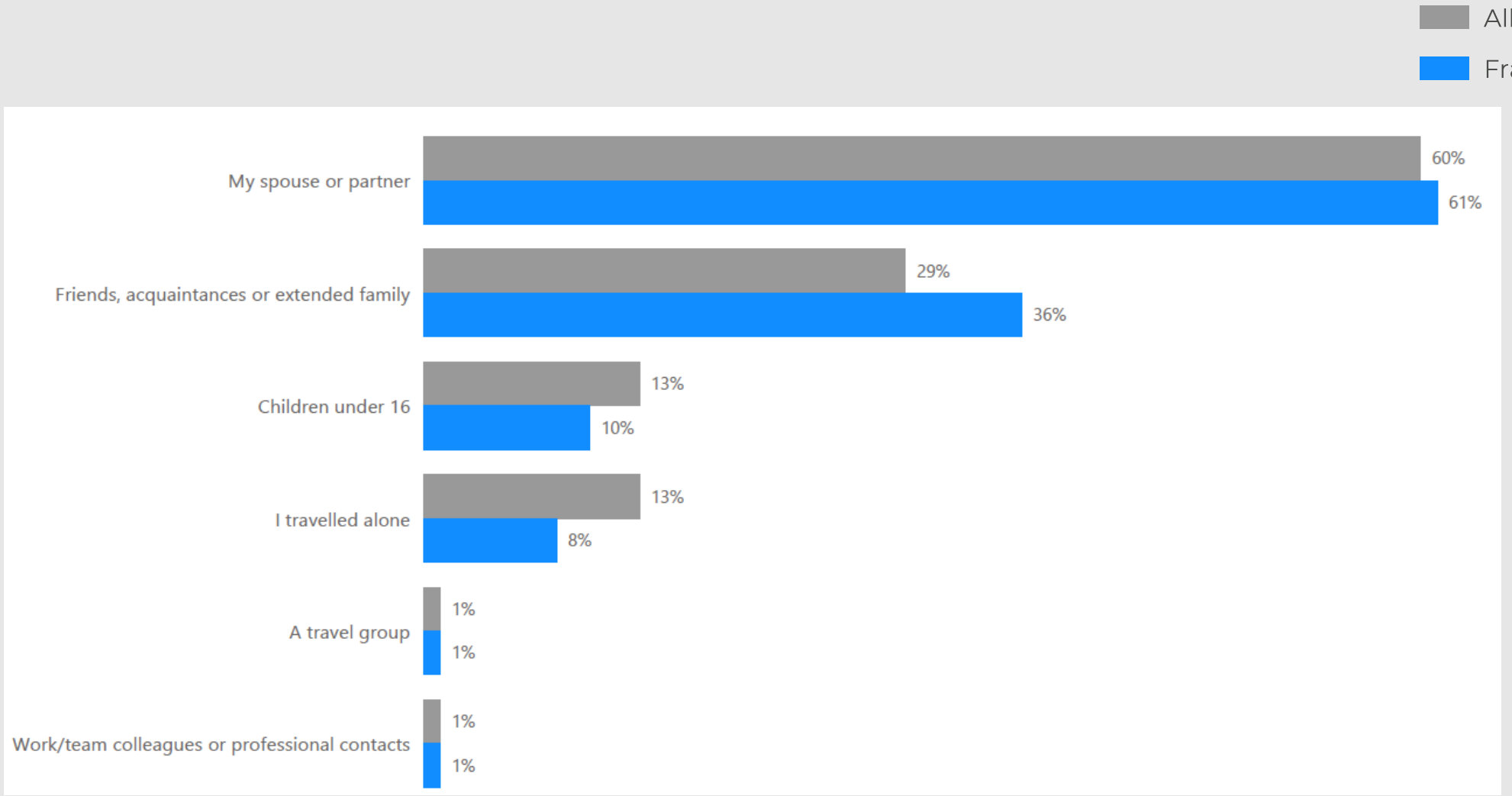
## Inbound leisure visitors with overnight, 2023-2024




Source: LFT/Ilres Visitor Survey.

# Travel party

## Inbound leisure visitors with overnight, 2023-2024

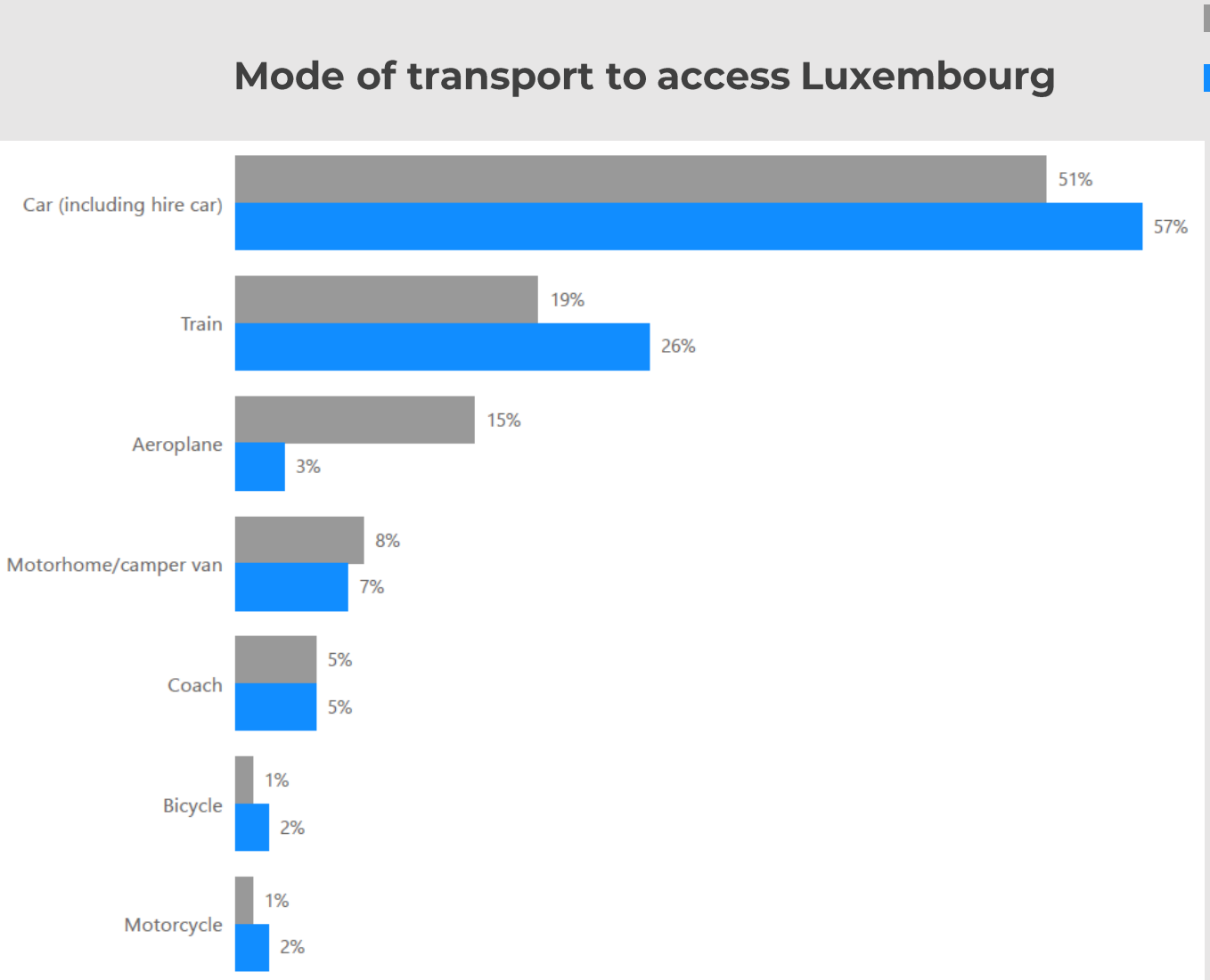



Source: LFT/Ilres Visitor Survey.

# Transport, new visitors and cross-border trips

## Inbound leisure visitors with overnight, 2023-2024

### Mode of transport to access Luxembourg




**First-time visitors**

**Visitors with overnight**

63%

All Inbound

53%

France

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

**Visitors with overnight**

39%

All Inbound

43%

France

Source: LFT/Ilres Visitor Survey.

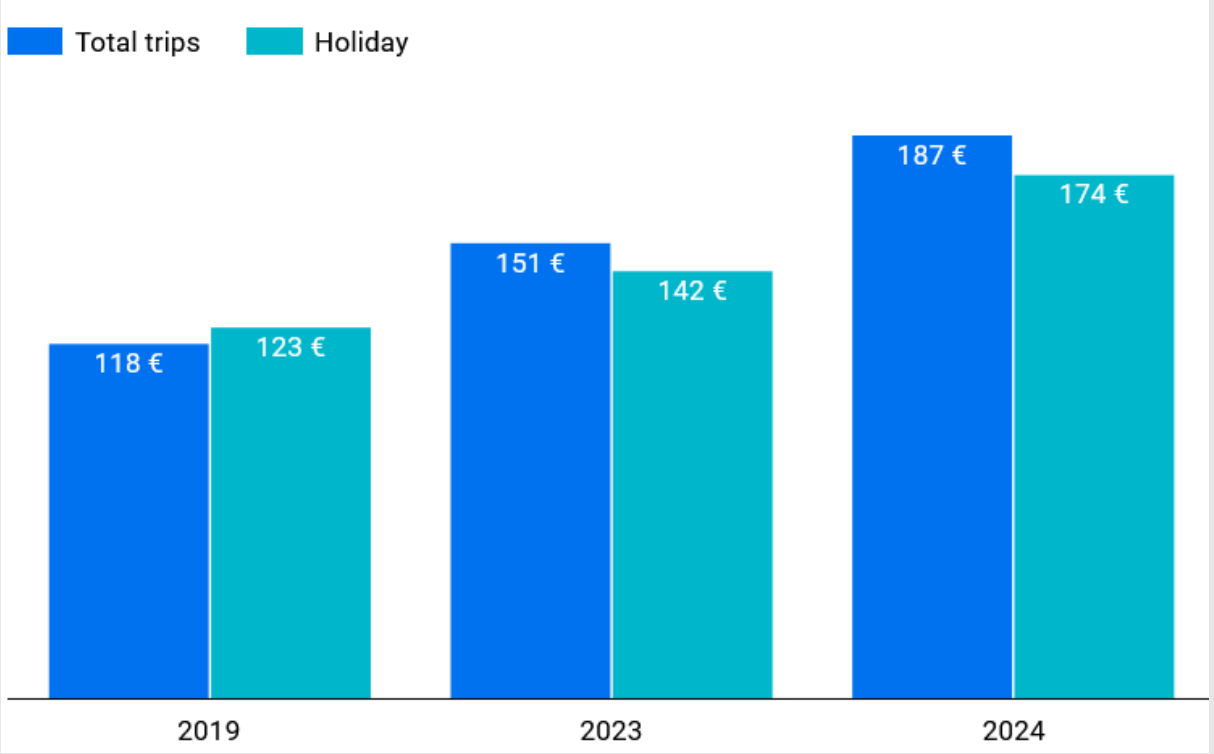
# Expenditure

## Inbound trips to Luxembourg with overnight (all accommodation)

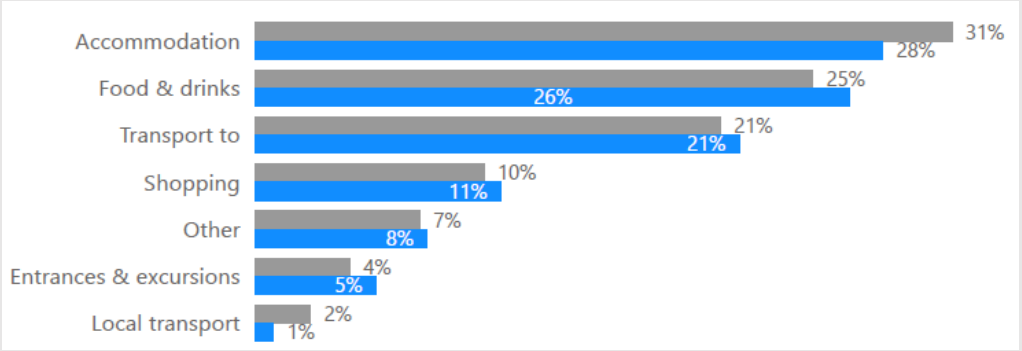
All inbound

France

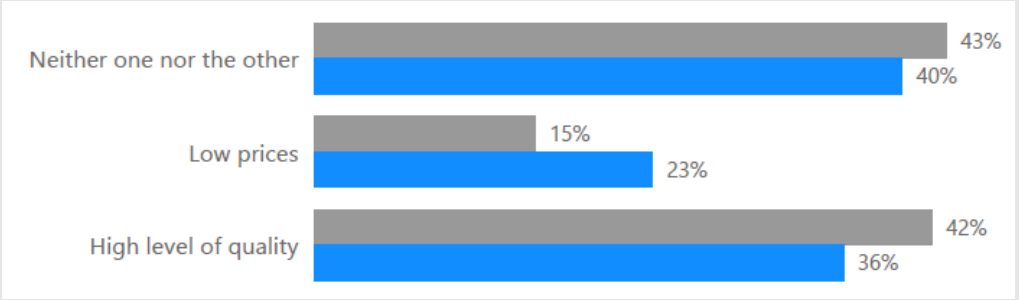
### Average expenditure/pers./day




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



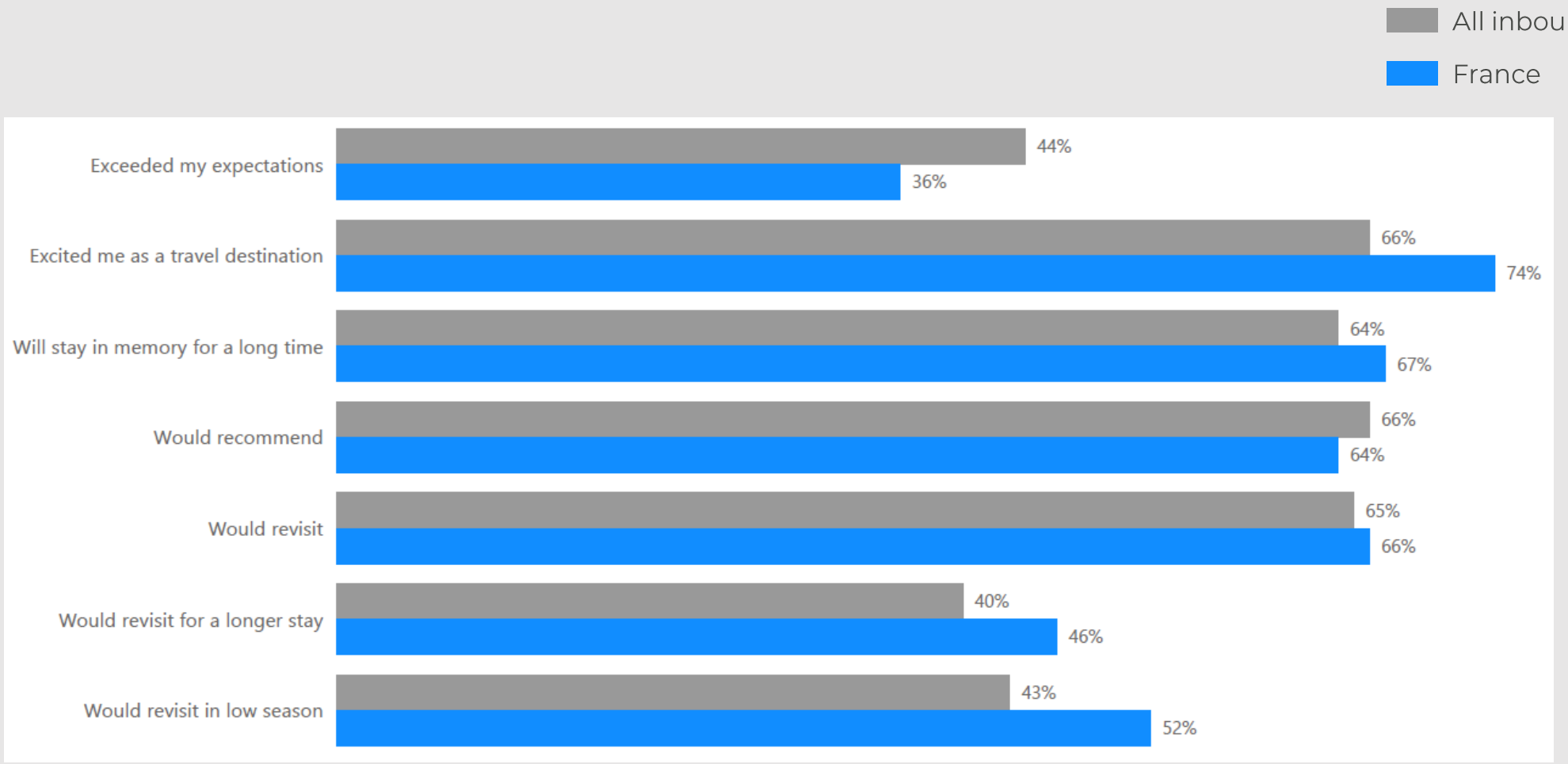

### Quality vs. price-orientation of leisure inbound visitors, 2023-2024




Sources: World Travel Monitor/IPK International, LFT/Ilres Visitor Survey.

# Visitor satisfaction and recommendation

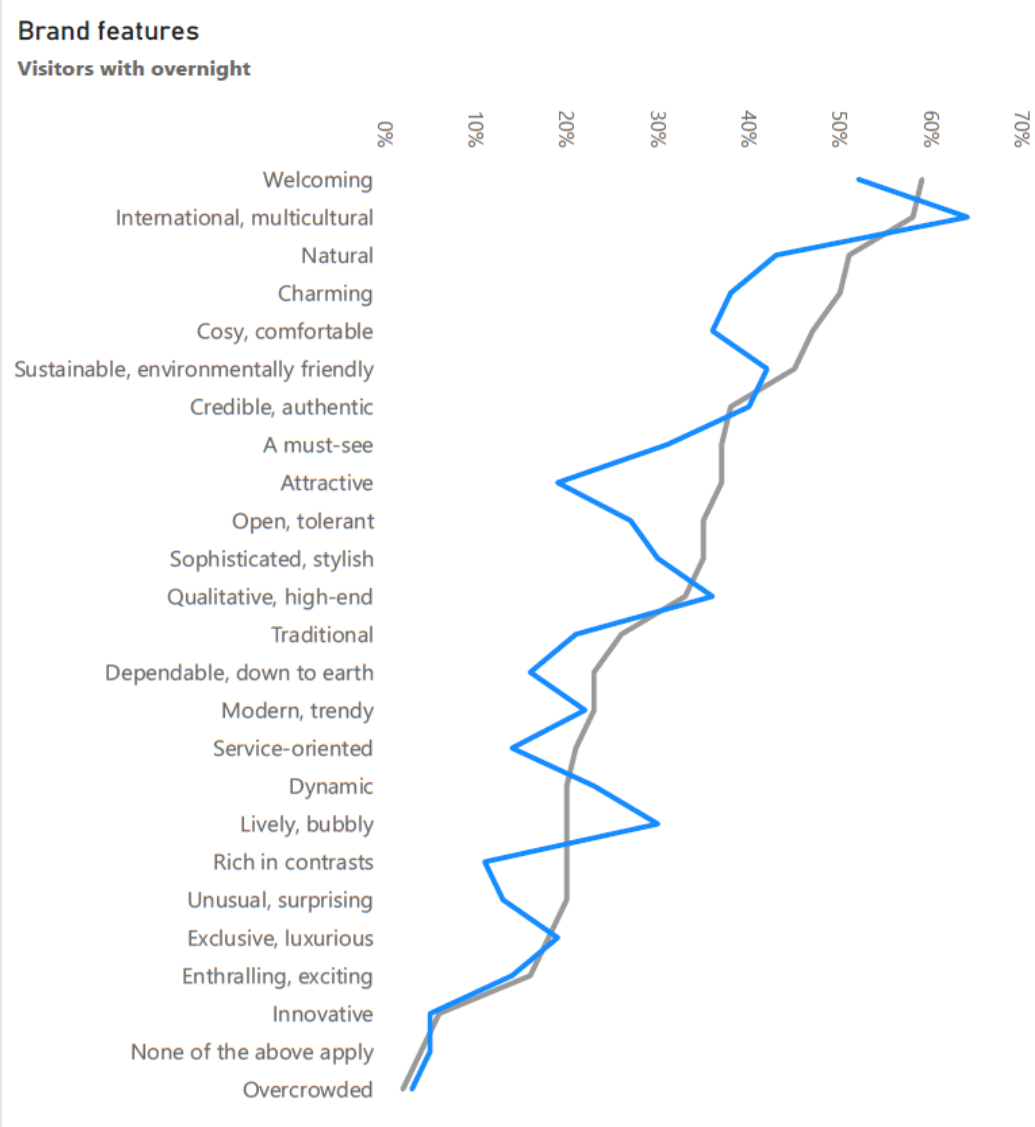
## Inbound leisure visitors, 2023-2024




Source: LFT/Ilres Visitor Survey.

# Brand features perception

## Inbound leisure visitors with overnights, 2023-2024



# Target segments,
# Brand & Growth Potential

# LFT Target Segments

**Explorers**

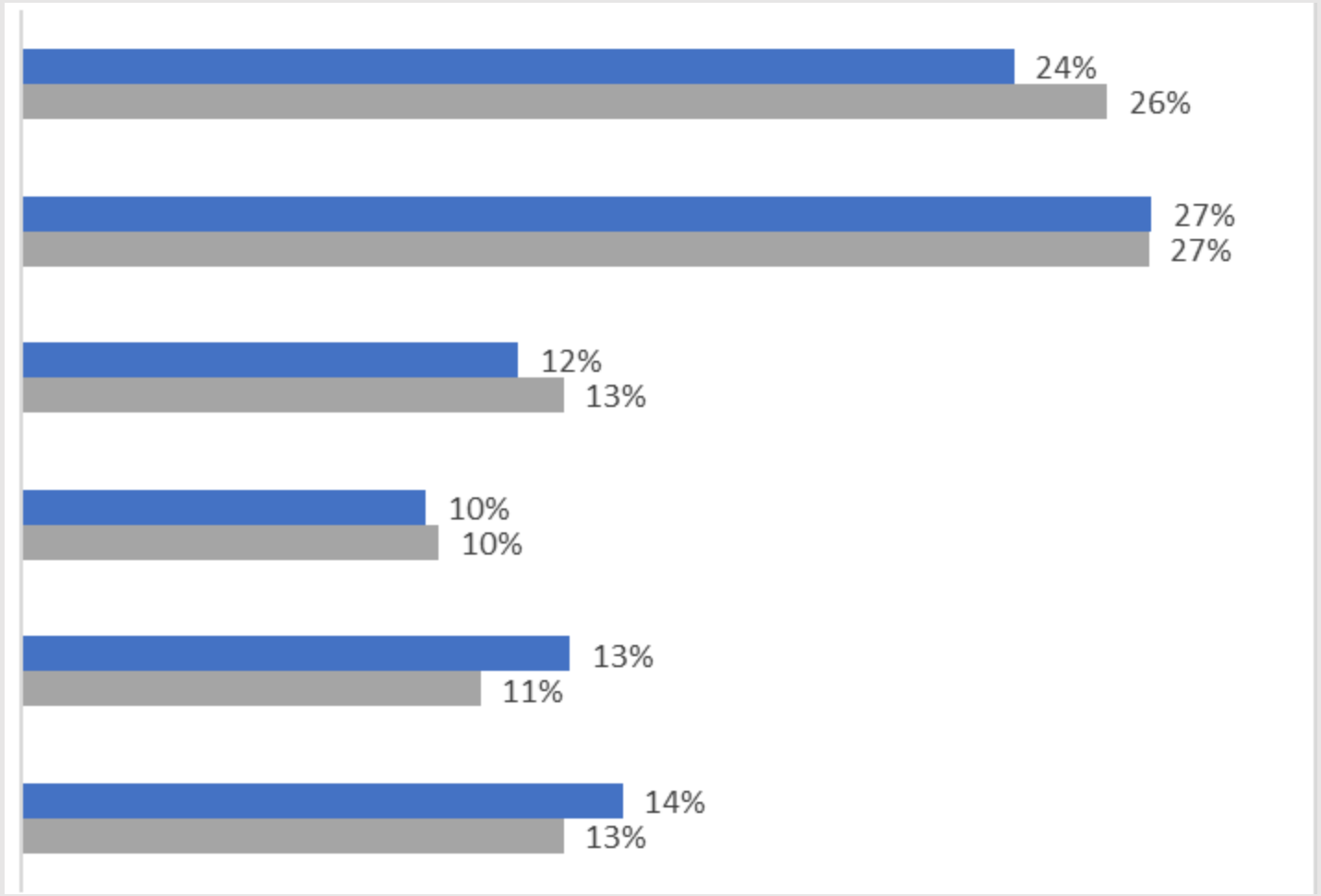
**Nature-Loving Actives**

**Relaxation Seekers**

**Short Breakers**

**Perfection Seekers**

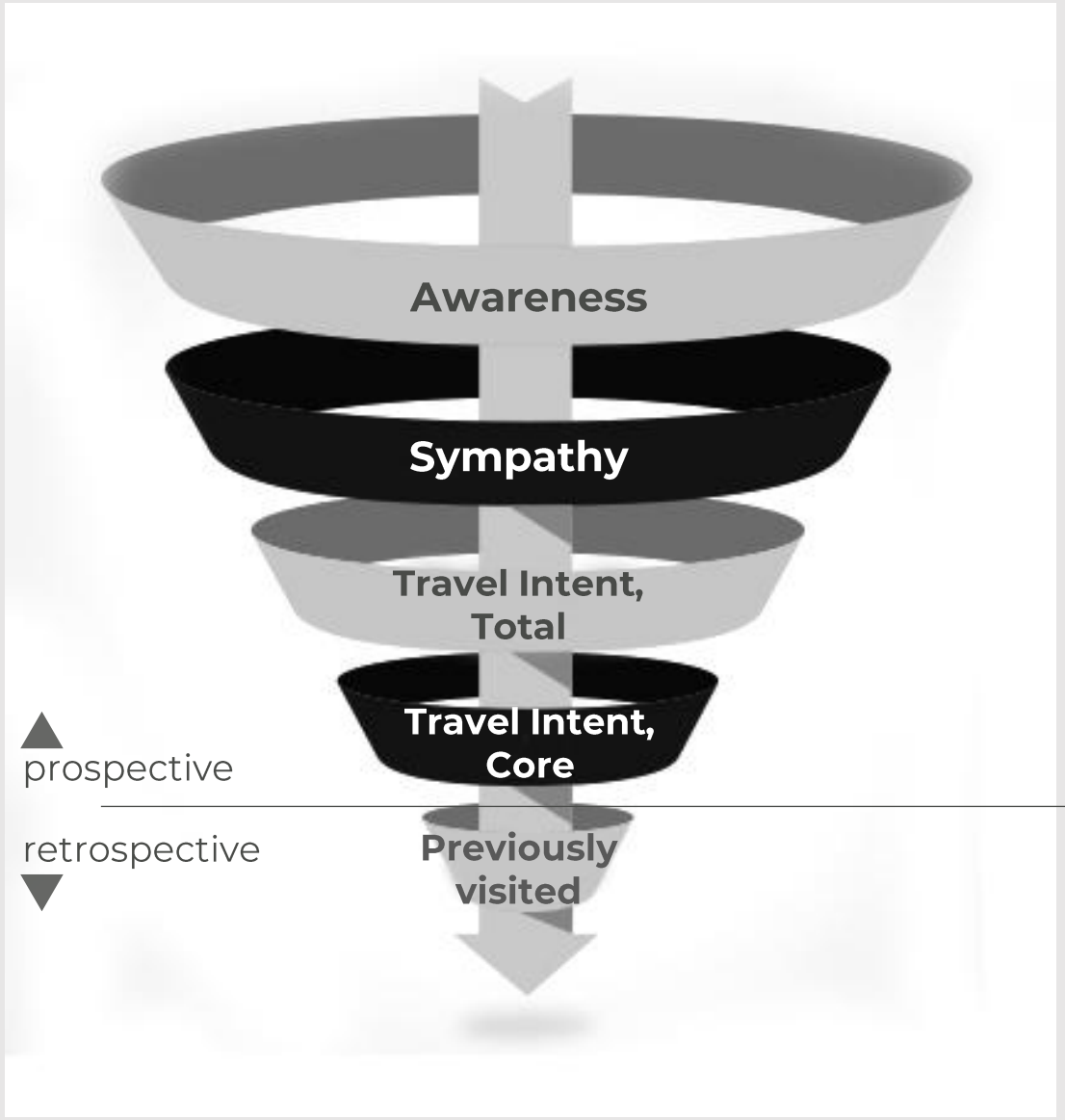
**Leisure Oriented**




Source: LFT (estimate).

# Destination Luxembourg – Brand Funnel 2024

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

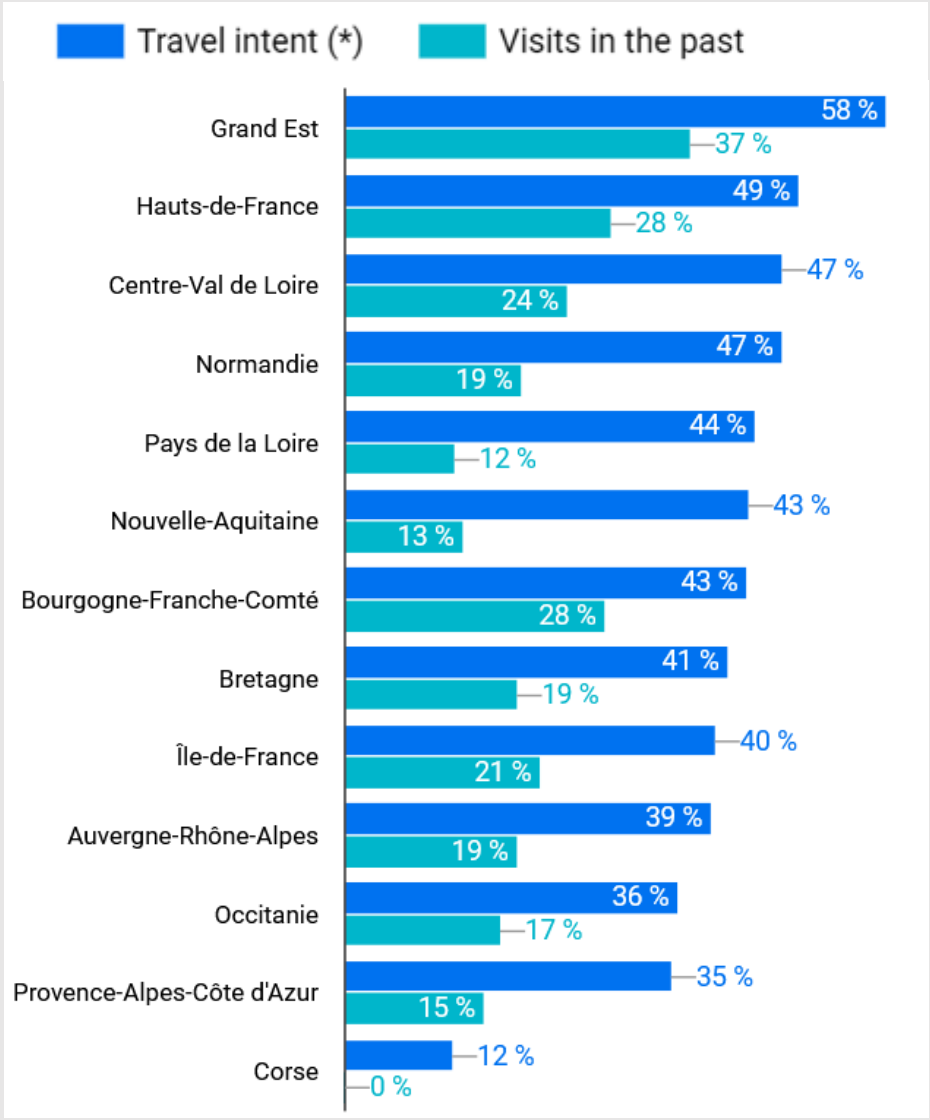



| | | |
|---|---|---|
| Awareness | 78% | 83% |
| | 74% | 70% |
| Sympathy | 58% | 58% |
| | 75% | 64% |
| Travel Intent, Total | 43% | 37% |
| | 31% | 28% |
| Travel Intent, Core | 18% | 16% |
| Previously visited | 17% | 19% |

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

# Regional origin 2024

## Past visitors and future potential




Source: LFT Brand & Potential Study, 2024.

# General theme interest (*)

| Theme | Rank | Rank | % interested |
|---|---|---|---|
| **Culinary** | 2 | **1** | 71% |
| **Sightseeing** | 4 | **2** | 71% |
| **Immersive travel** | 6 | **3** | 70% |
| **Nature** | 3 | **4** | 69% |
| **Resting/Relaxation** | 1 | **5** | 69% |
| **Architecture/townscapes** | 7 | **6** | 68% |
| **Family** | 12 | **7** | 67% |
| **Learning/new skills** | 14 | **8** | 67% |
| **Exchanging with locals** | 13 | **9** | 65% |
| **Fun/entertainment** | 8 | **10** | 64% |
| **History/Unesco** | 10 | **11** | 64% |
| **Culture** | 11 | **12** | 61% |
| **Events** | 16 | **13** | 61% |
| **Sustainability** | 15 | **14** | 61% |
| **City** | 5 | **15** | 60% |
| **Castles** | 9 | **16** | 59% |
| **Hiking** | 17 | **17** | 54% |
| **Adventure/action** | 19 | **18** | 54% |
| **Travelling by train** | 18 | **19** | 52% |
| **Nightlife (**)** | 20 | **20** | 52% |
| **Remembrance** | 26 | **21** | 51% |
| **Shopping** | 23 | **22** | 49% |
| **Active-sports** | 27 | **23** | 48% |
| **Wine** | 21 | **24** | 48% |
| **Countryside** | 22 | **25** | 48% |
| **Industrial heritage** | 28 | **26** | 45% |
| **Wellness** | 25 | **27** | 44% |
| **Film locations** | 30 | **28** | 44% |
| **Cycling** | 31 | **29** | 43% |
| **Camping** | 29 | **30** | 40% |
| **Luxury** | 24 | **31** | 37% |
| **MTB** | 32 | **32** | 33% |
| **Motorcycling** | 33 | **33** | 27% |

(*) 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, 2024.

# Luxembourg's Theme Competence (*)

| Theme | Rank | Rank | % agreeing |
|---|---|---|---|
| **City** | 1 | **1** | 35% |
| **Family** | 8 | **2** | 34% |
| **Luxury** | 9 | **3** | 33% |
| **Resting/Relaxation** | 2 | **4** | 32% |
| **Architecture/townscapes** | 4 | **5** | 31% |
| **Shopping** | 10 | **6** | 29% |
| **Culture** | 6 | **7** | 27% |
| **Culinary** | 3 | **8** | 28% |
| **Nature** | 5 | **9** | 27% |
| **Fun/entertainment** | 13 | **10** | 26% |
| **Nightlife (**)** | 14 | **11** | 25% |
| **Castles** | 7 | **12** | 24% |
| **History/Unesco** | 12 | **13** | 23% |
| **Events** | 23 | **14** | 20% |
| **Hiking** | 11 | **15** | 18% |
| **Cycling** | 20 | **16** | 18% |
| **Wellness** | 16 | **17** | 17% |
| **Active-sports** | 21 | **18** | 17% |
| **Wine** | 15 | **19** | 17% |
| **Sustainability** | 18 | **20** | 16% |
| **Industrial heritage** | 24 | **21** | 6% |
| **Remembrance** | 26 | **22** | 15% |
| **Adventure/action** | 22 | **23** | 15% |
| **Countryside** | 17 | **24** | 15% |
| **Camping** | 19 | **25** | 13% |
| **MTB** | 25 | **26** | 13% |

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

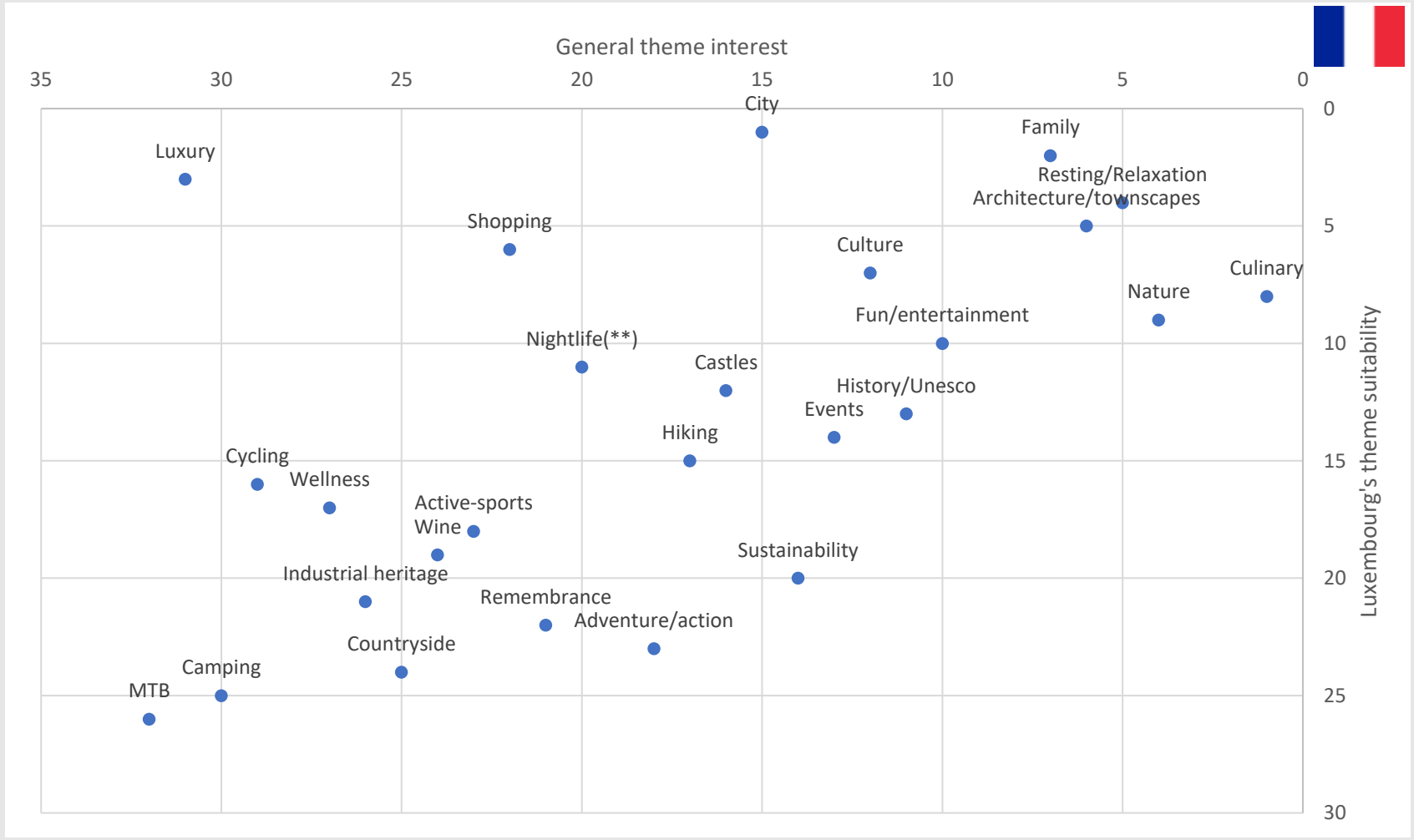
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

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

Source: LFT Brand & Potential Study, 2024.

# 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).

Source: LFT Brand & Potential Study, 2024.

# Luxembourg's Brand Value Ratings (*)

| Feature | | | |
|---|---|---|---|
| | Rank | **Rank** | % agreeing |
| **clean** | 2 | **1** | 44% |
| **safe** | 1 | **2** | 37% |
| **of high quality** | 3 | **3** | 33% |
| **open-minded, tolerant, international** | 6 | **4** | 31% |
| **welcoming, hospitable** | 4 | **5** | 30% |
| **authentic, real** | 5 | **6** | 30% |
| **exclusive, luxurious** | 8 | **7** | 29% |
| **dynamic, modern** | 9 | **8** | 27% |
| **attractive, appealing** | 7 | **9** | 25% |
| **varied, diversified** | 12 | **10** | 23% |
| **lively, trendy** | 13 | **11** | 21% |
| **surprising** | 11 | **12** | 19% |
| **service oriented** | 10 | **13** | 18% |
| **affordable** | 16 | **14** | 17% |
| **not overcrowded / insider tip** | 14 | **15** | 17% |
| **sustainable** | 15 | **16** | 17% |

(*) 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.

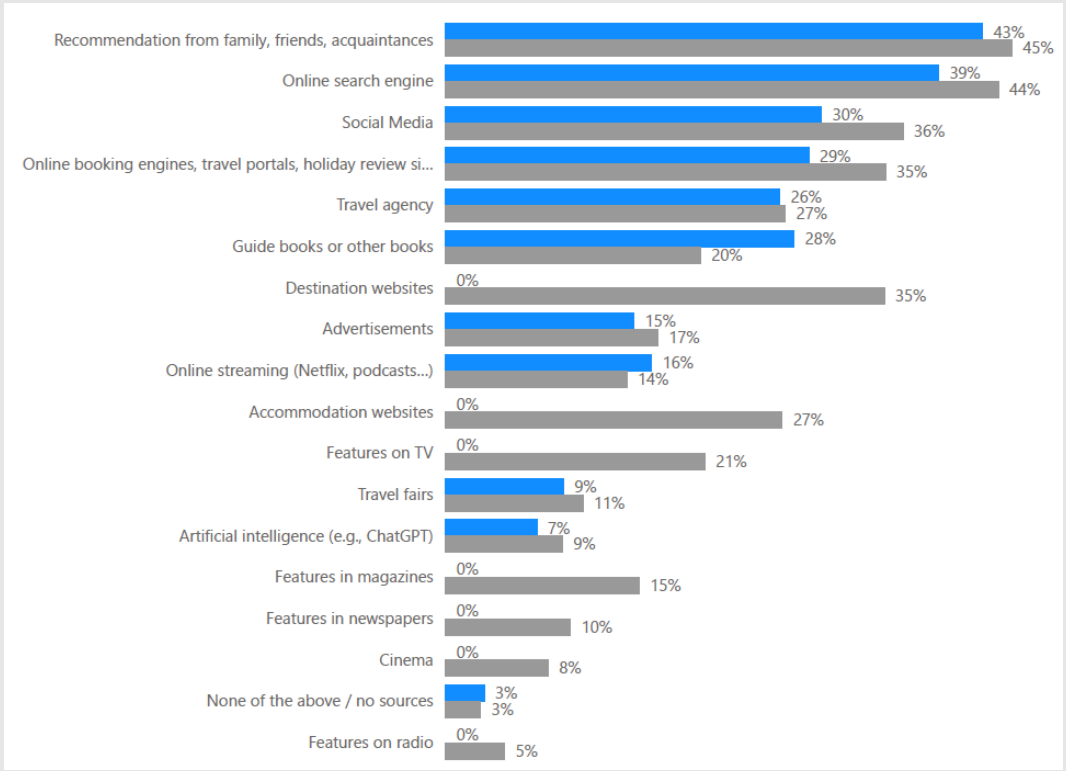
Source: LFT Brand & Potential Study, 2024.

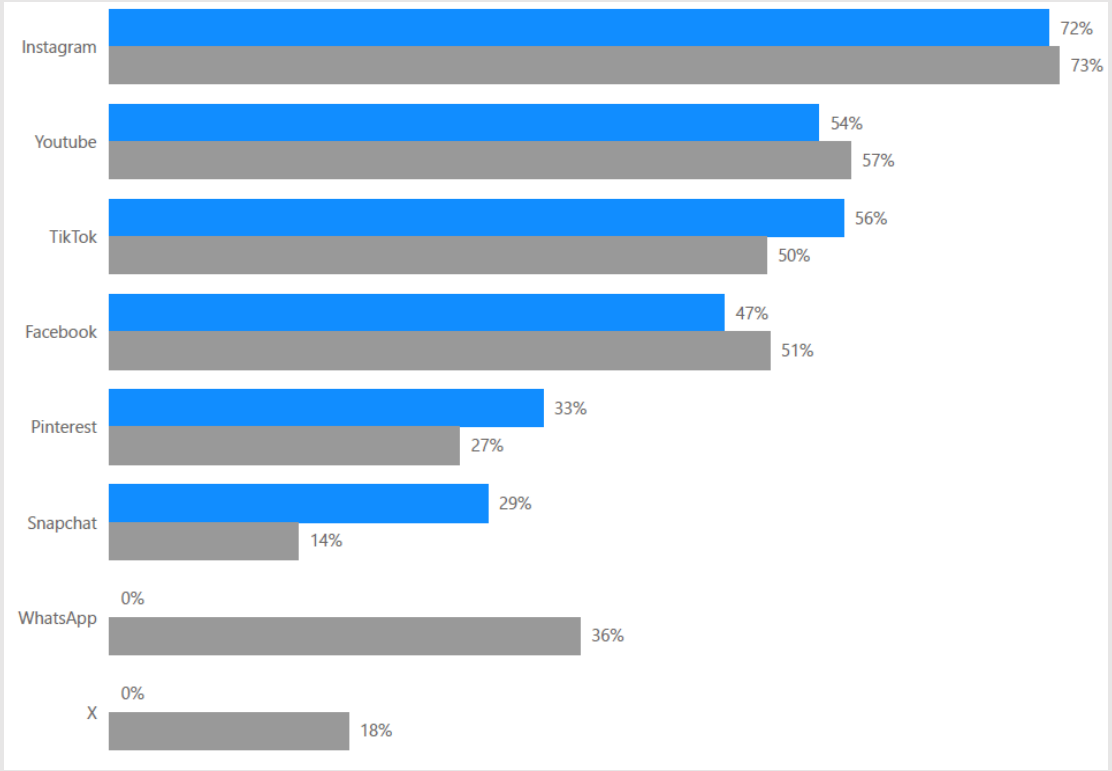
# Spontaneous associations with Luxembourg

Source: LFT Brand & Potential Study, 2024.

# Trip organisation and preferences (1)

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



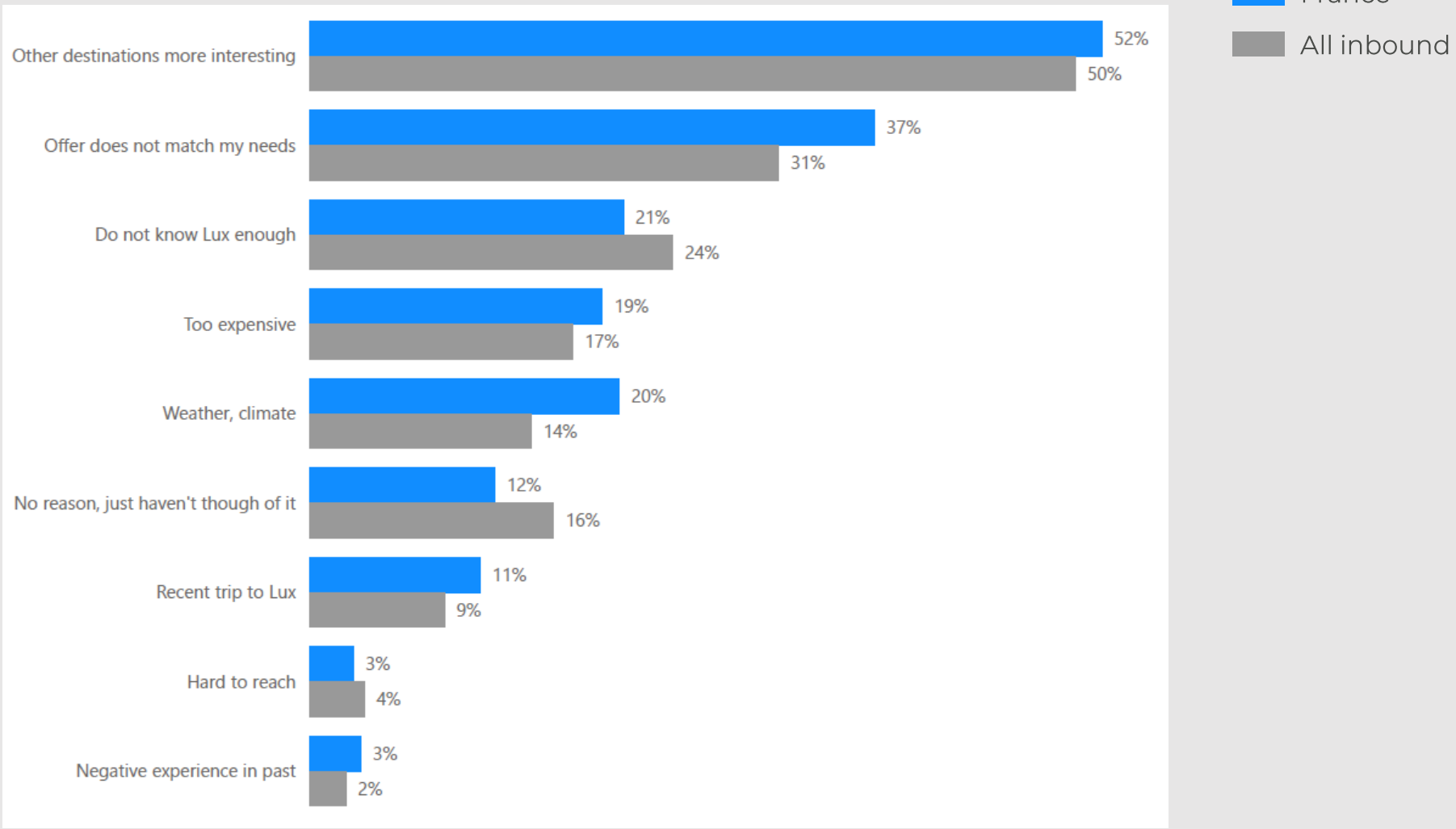

**Interest for longer stays and cross-border stays to Luxembourg** (in case of general travel intent to Luxembourg)

Source: LFT Brand & Potential Study, 2024.

# Trip organisation and preferences (2)

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

## Reasons for not considering Luxembourg as a destination

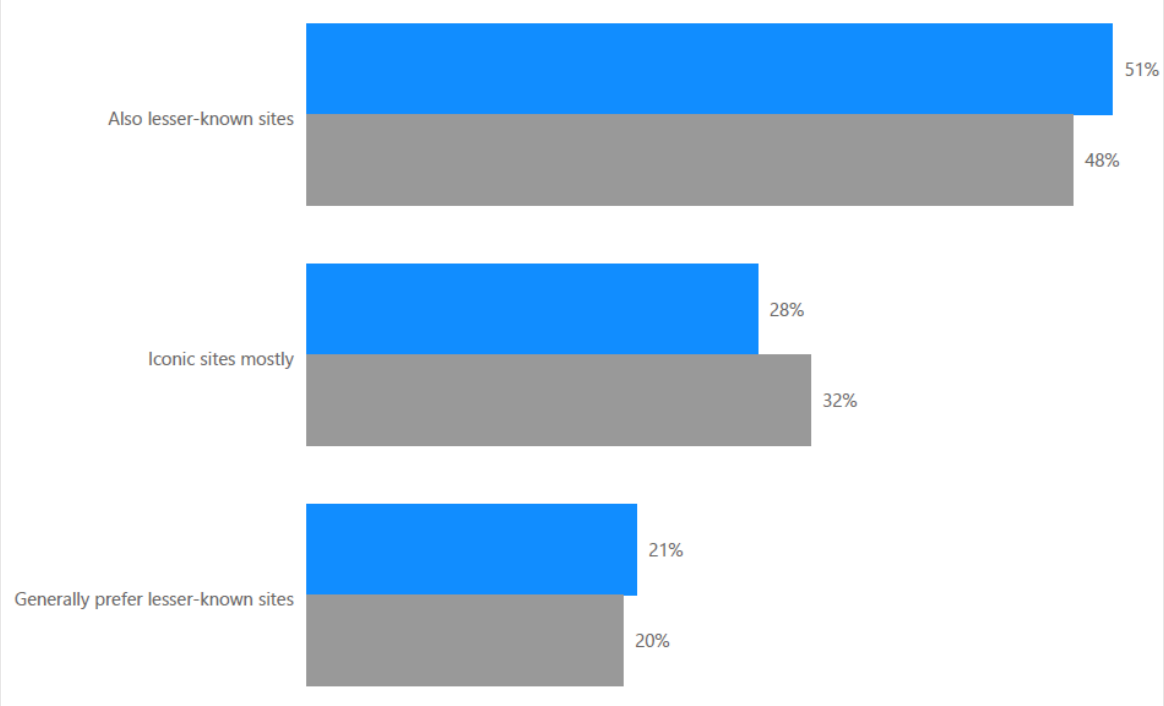



Source: LFT Brand & Potential Study, 2024.

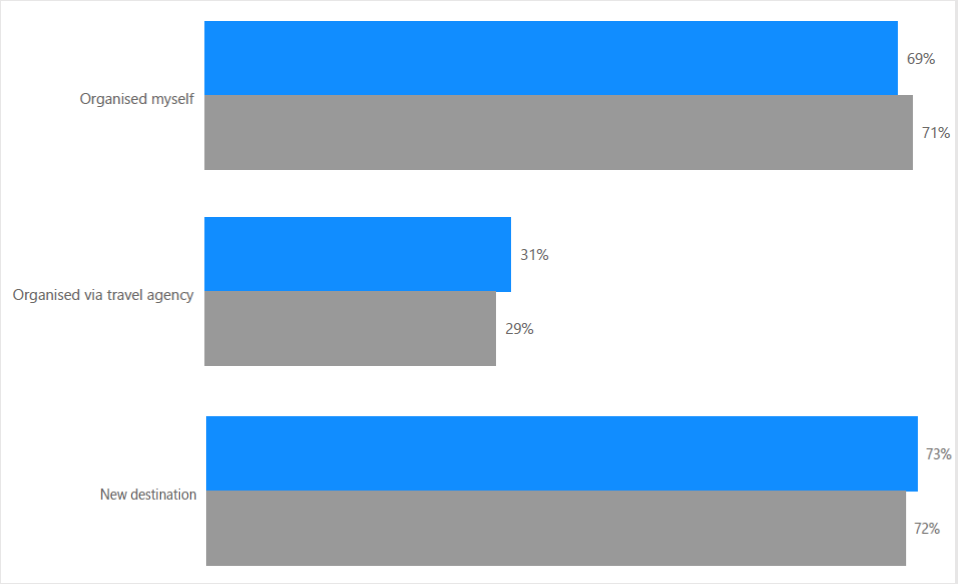
# Trip organisation and preference (3)

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

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




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




France

All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.

# Your contact

**Alain Krier**
*Head of Insights & Strategy*
T. +352 42 82 82 36
alain.krier@LfT.lu

VISIT LUXEMBOURG

**Luxembourg for Tourism GIE**
6, rue Antoine de Saint-Exupéry
L-1432 Luxembourg-Kirchberg
www.visitluxembourg.com