



Luxembourg for Tourism

# Market profile

# FRANCE

# 2024





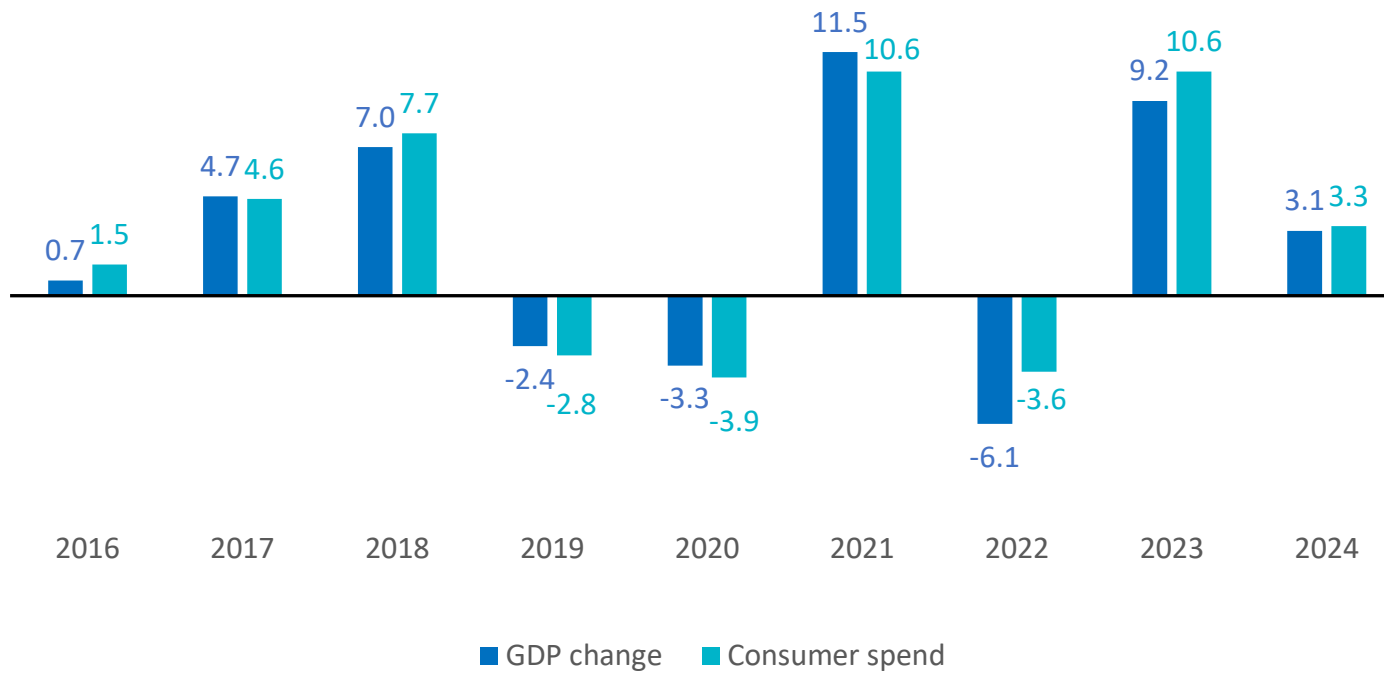
# **Economic indicators & General Travel Demand**

# Economic indicators – General travel demand



## GDP and consumer spending, % annual change

## Economy & population



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

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

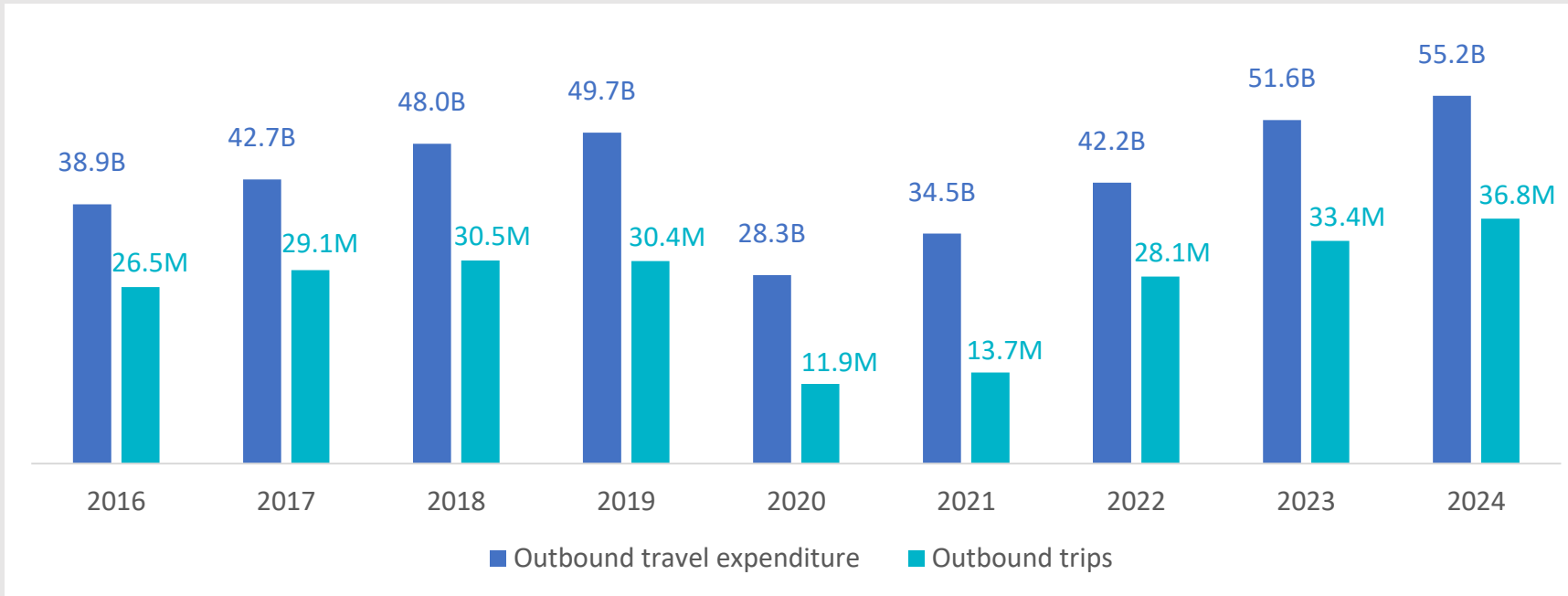
**Inflation(%)**  
**2.00**

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

# Economic indicators – General travel demand



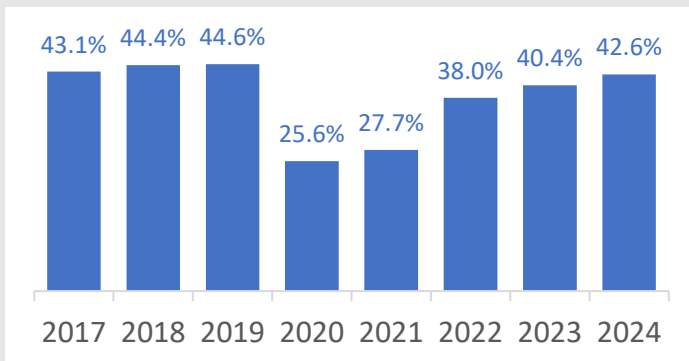
## Outbound trips and travel expenditure



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

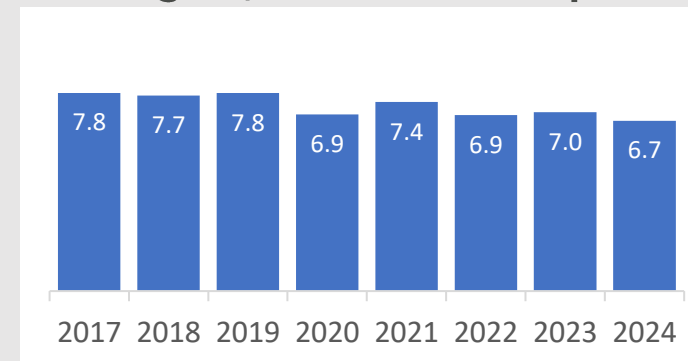
**Average spend**  
**per outbound trip (2024)**  
**1,502 \$**

## 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%**



# **Arrivals & nights in paid accommodation**

# Nights in paid accommodation

## 2024 and 2018-2024

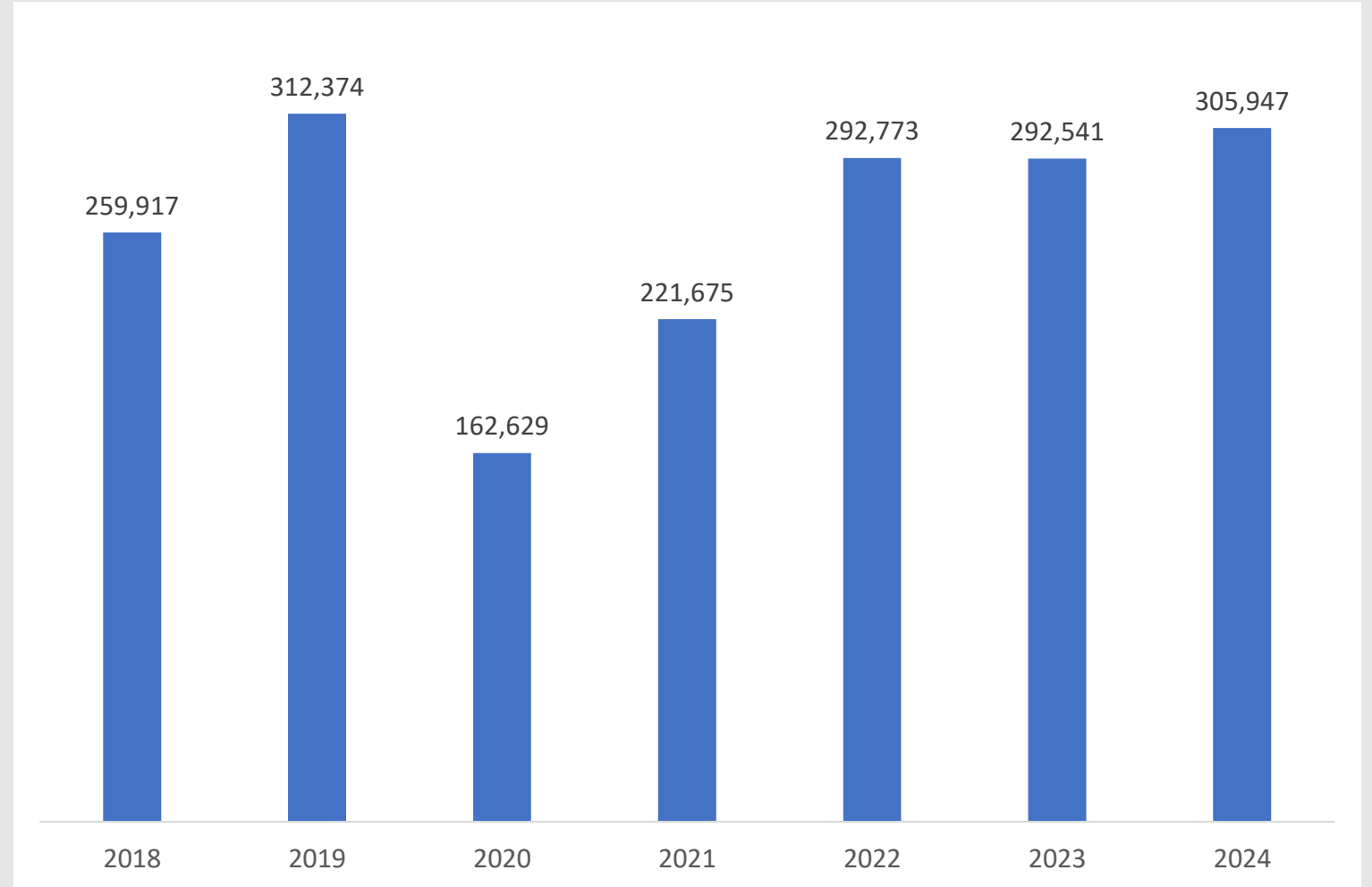


**Nights,  
paid accommodation, 2024**



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

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

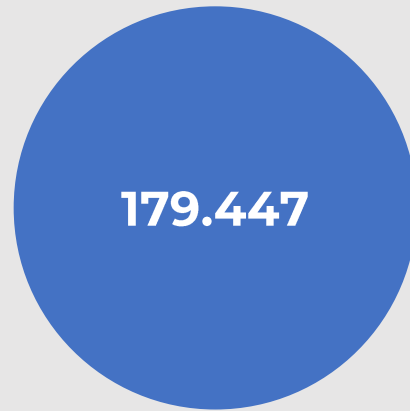


# Arrivals in paid accommodation

## 2024 and 2018-2024

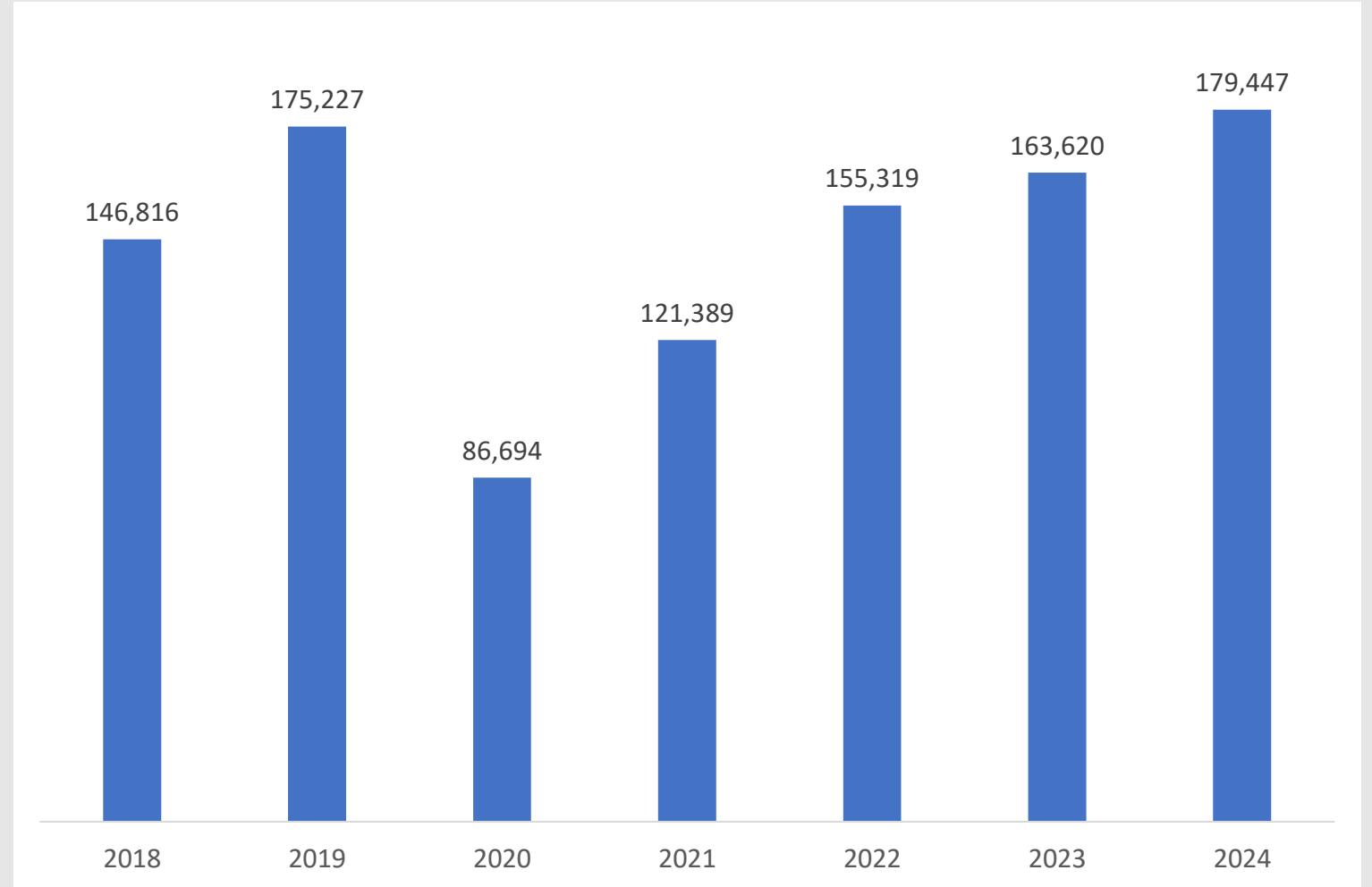


Arrivals,  
paid accommodation, 2024



+10% (vs. 2023)

+2% (vs. 2019)



# Length of stay, paid accommodation

## 2024 and 2018-2024

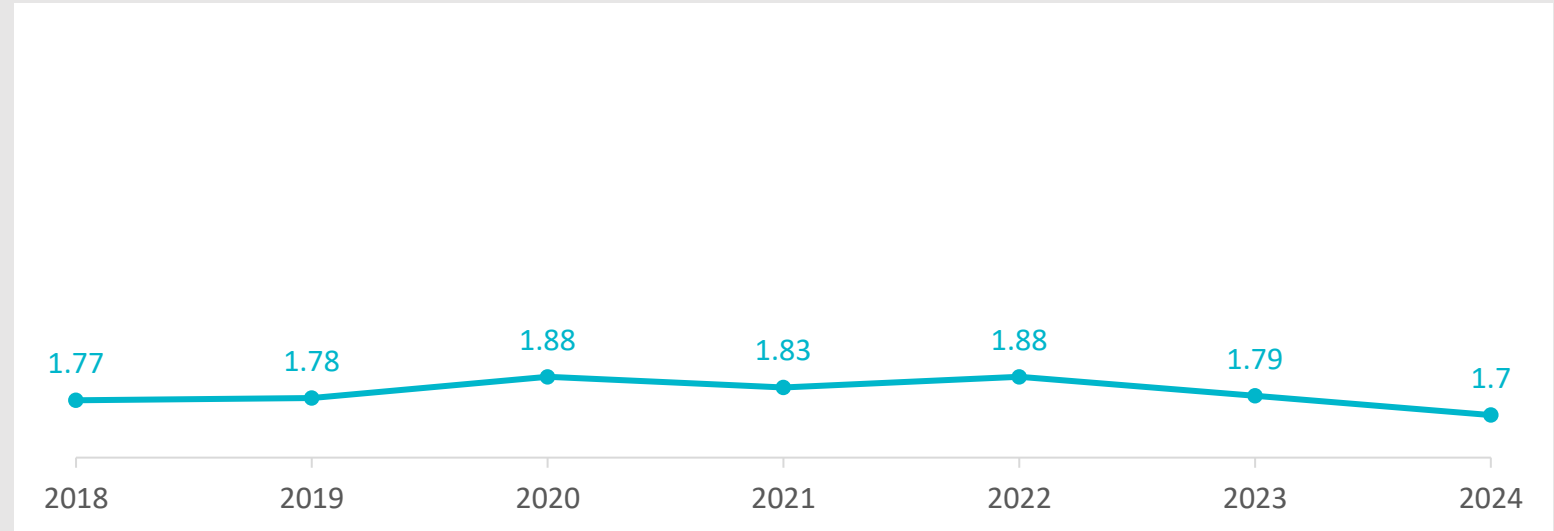


Average length of stay,  
paid accommodation, 2024



-0.09 nights (vs. 2023)

-0.08 nights (vs. 2019)



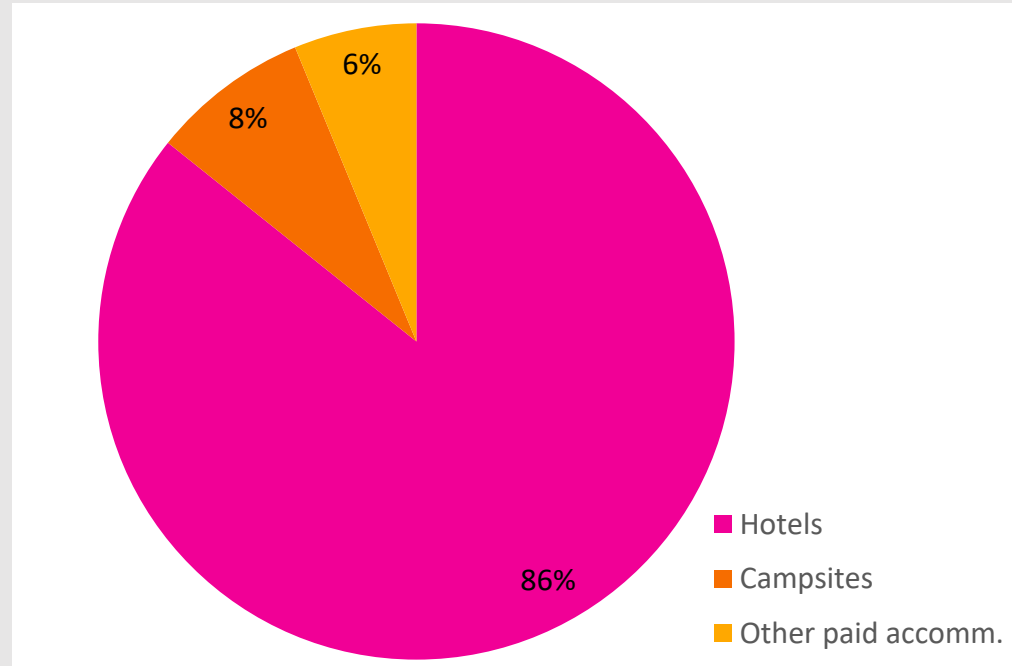


# Nights & arrivals in paid accommodation

Type of accommodation, 2024

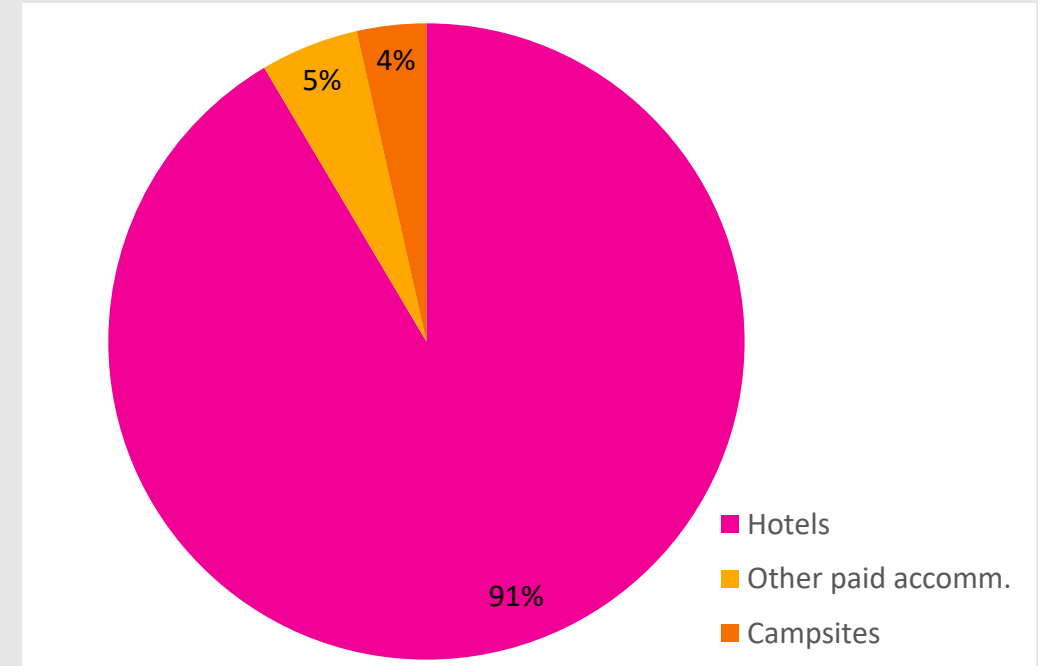


Nights,  
paid accommodation, 2024



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



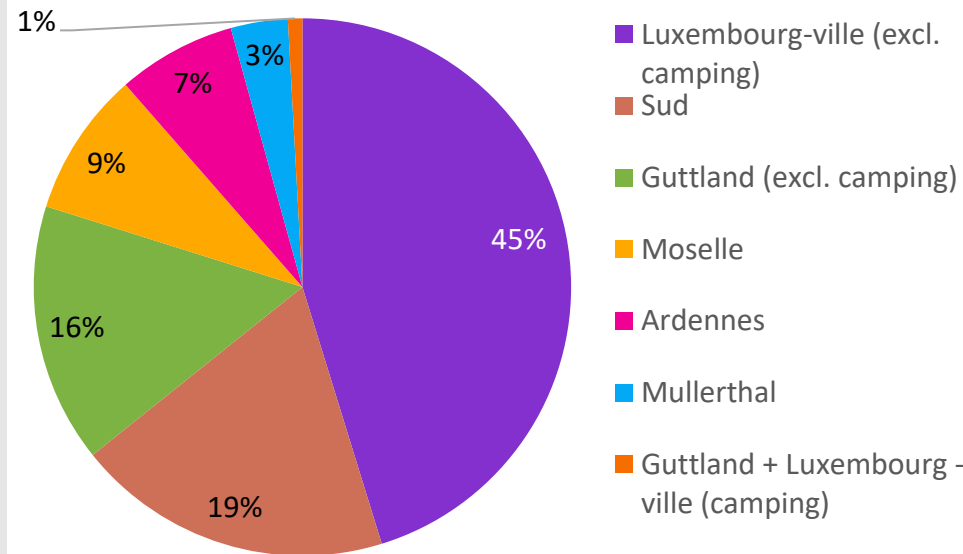
Hotels	164.168	+10% (vs. 2023)	+3% (vs. 2019)
Other paid accomm.	8.956	+12% (vs. 2023)	-13% (vs. 2019)
Campsites	6.323	+10% (vs. 2023)	+9% (vs. 2019)

# Nights & arrivals in paid accommodation

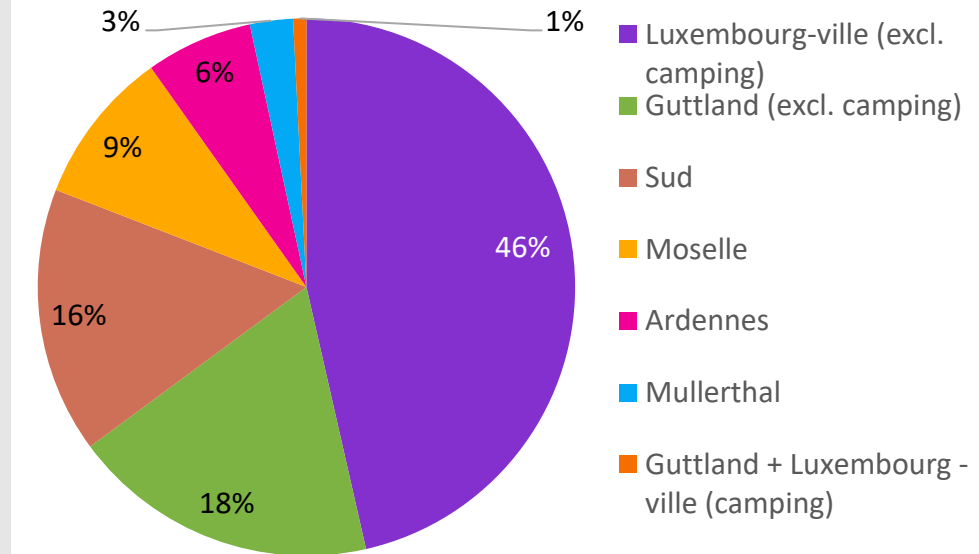
## Regions, 2024



### 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)

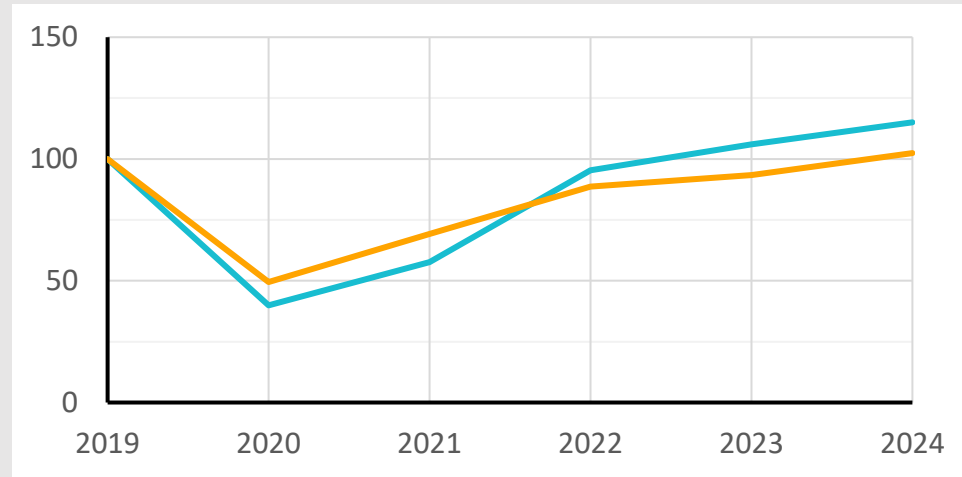
Lux.-City (excl. camping)	83.329	+6% (vs. 2023)	-10% (vs. 2019)
Guttland (excl. camping)	33.110	+6% (vs. 2023)	+36% (vs. 2019)
South	28.714	+18% (vs. 2023)	+25% (vs. 2019)
Moselle	16.692	+26% (vs. 2023)	+9% (vs. 2019)
Eislek	11.534	+10% (vs. 2023)	-13% (vs. 2019)
MPSL	4.642	+19% (vs. 2023)	-16% (vs.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

# Arrivals in paid accommodation

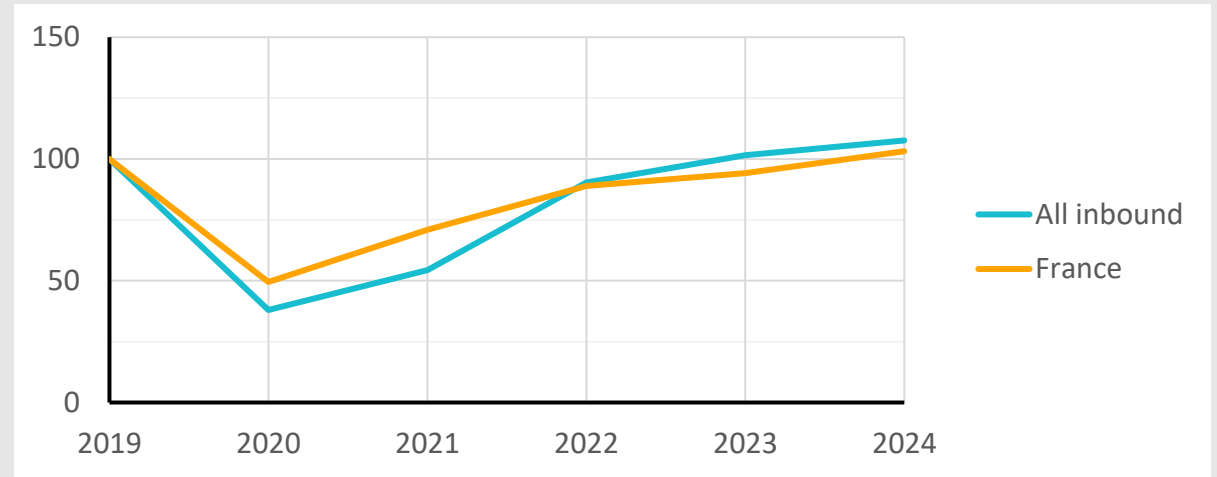
## Trends 2019-2024



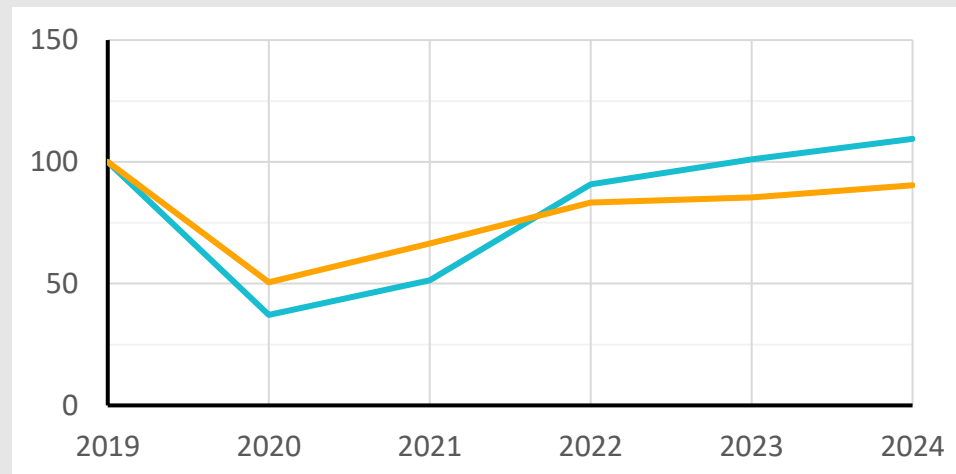
**All paid accommodation, national (2019 = Index 100)**



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



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

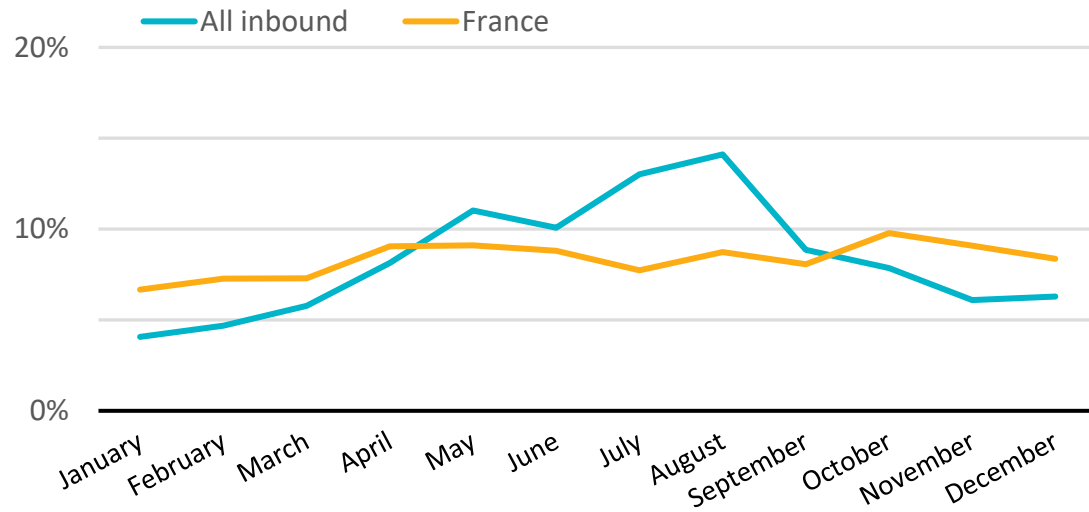


# Arrivals in paid accommodation

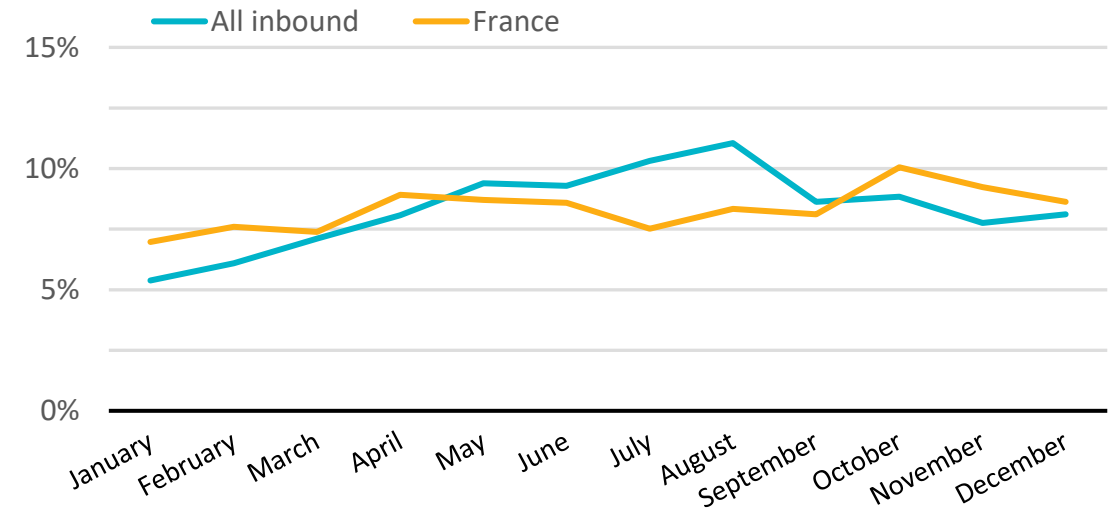
## Seasonality



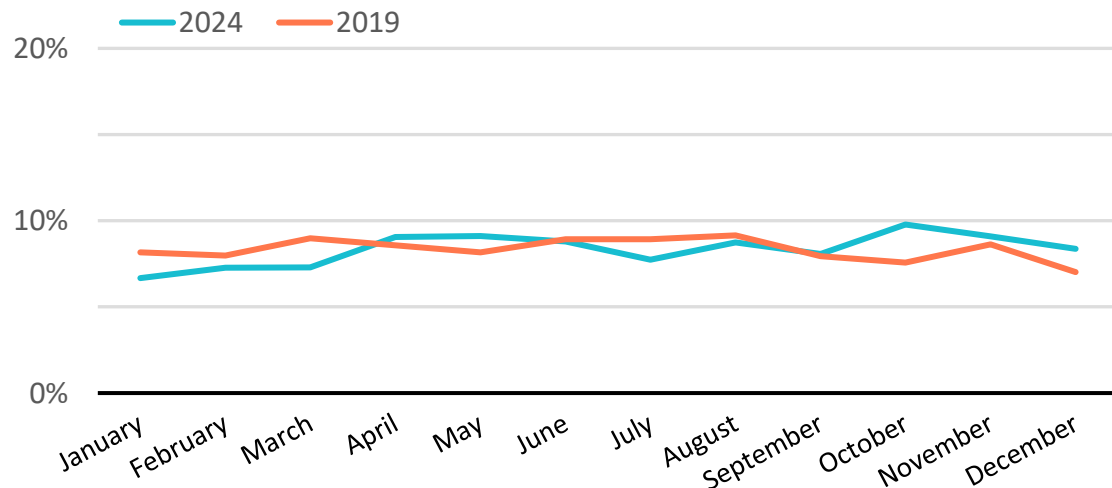
### All paid accommodation, 2024



### Hotels, 2024



### All paid accommodation, arrivals from France





# Short-term rentals

## 2024 and 2018-2024



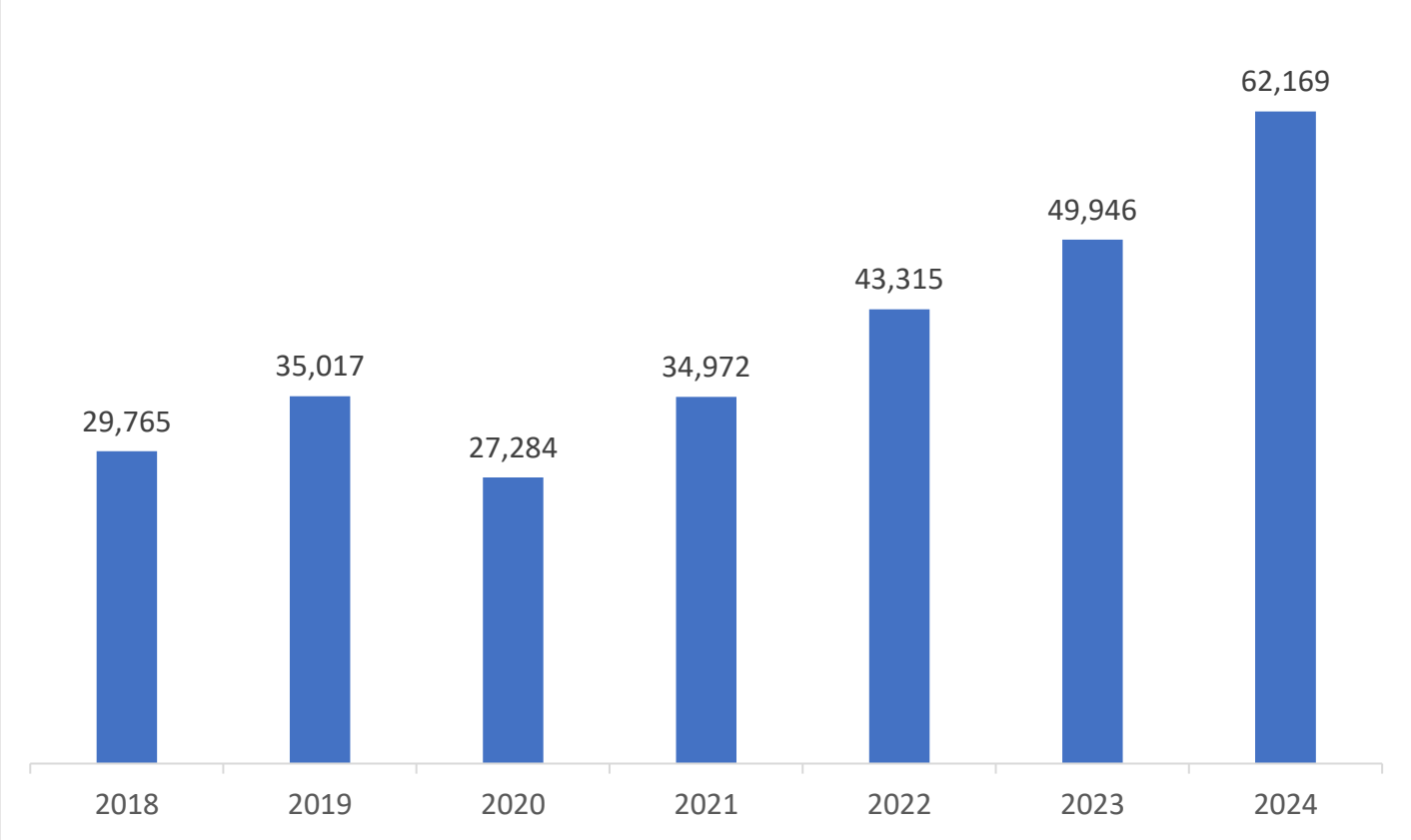
Nights,  
Short-term rentals, 2024



24% (vs. 2023)

78% (vs. 2019)

Nights,  
Short-term rentals, 2018-2024





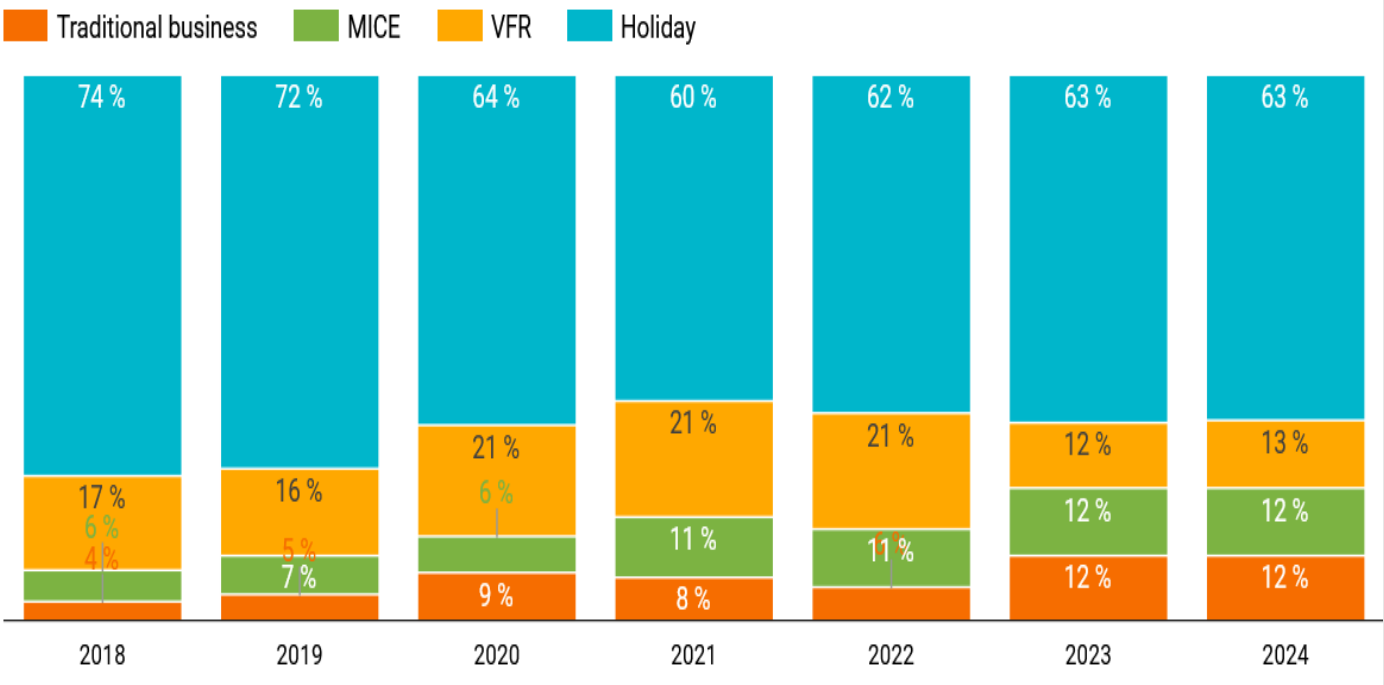
# **Characteristics of inbound trips**

# 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%

# Inbound same-day trips to Luxembourg

## 2024



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



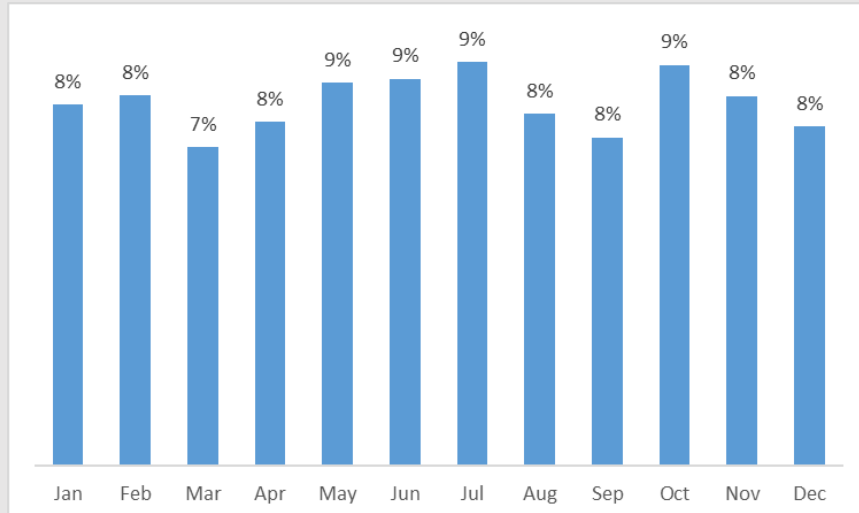
-14% (vs. 2023)

Average length  
of same-day trips



-0,1 h (vs. 2023)

Seasonality  
% of same-day trips





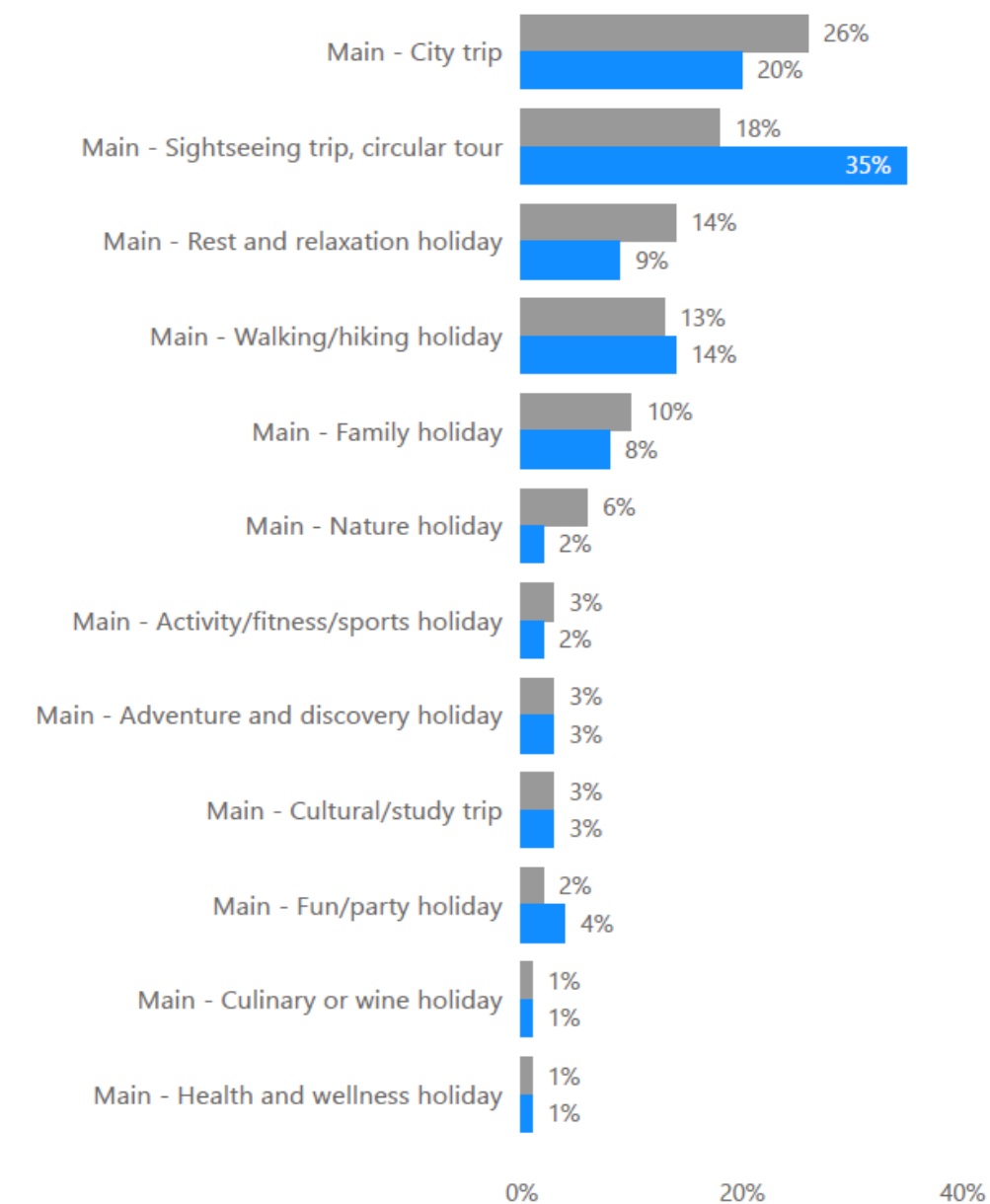


# **Travel behaviour of inbound leisure visitors**

## Main holiday types

### Visitors with overnight

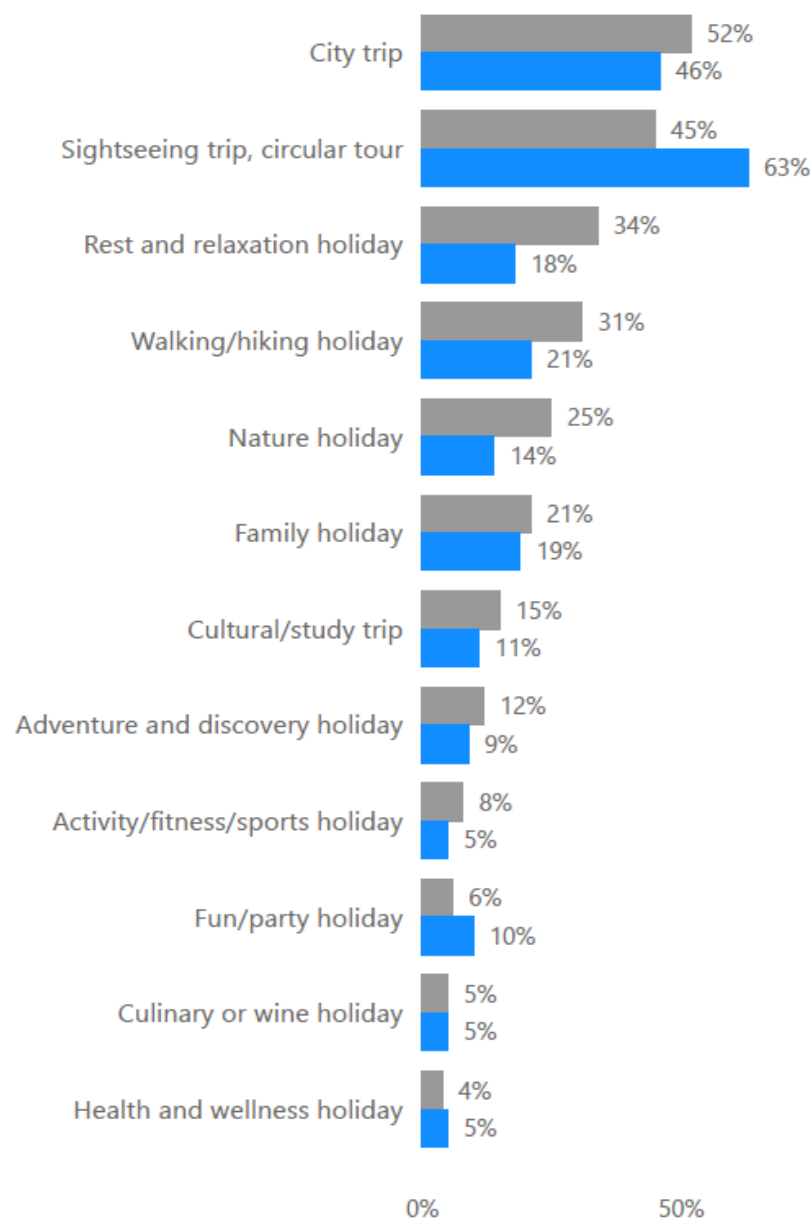
● All Inbound ● France



## All holiday types

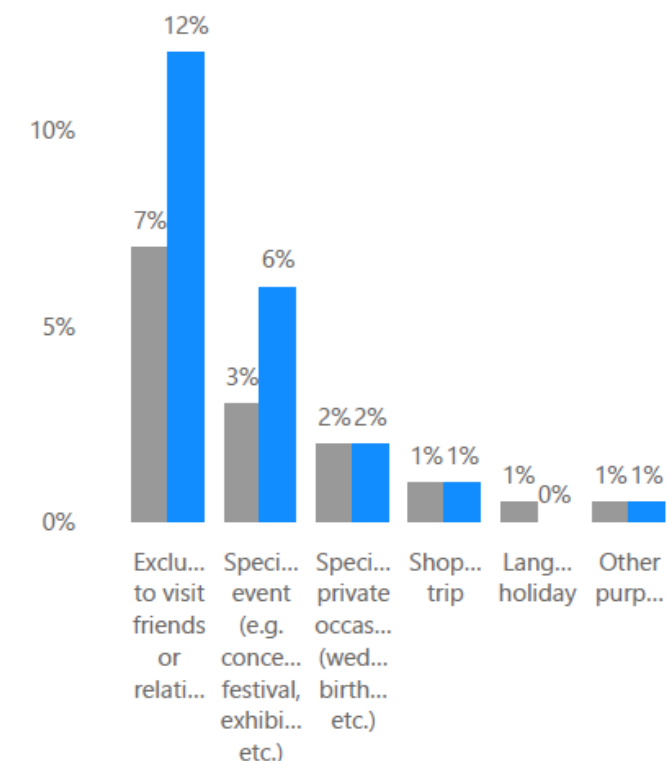
### Visitors with overnight

● All Inbound ● France



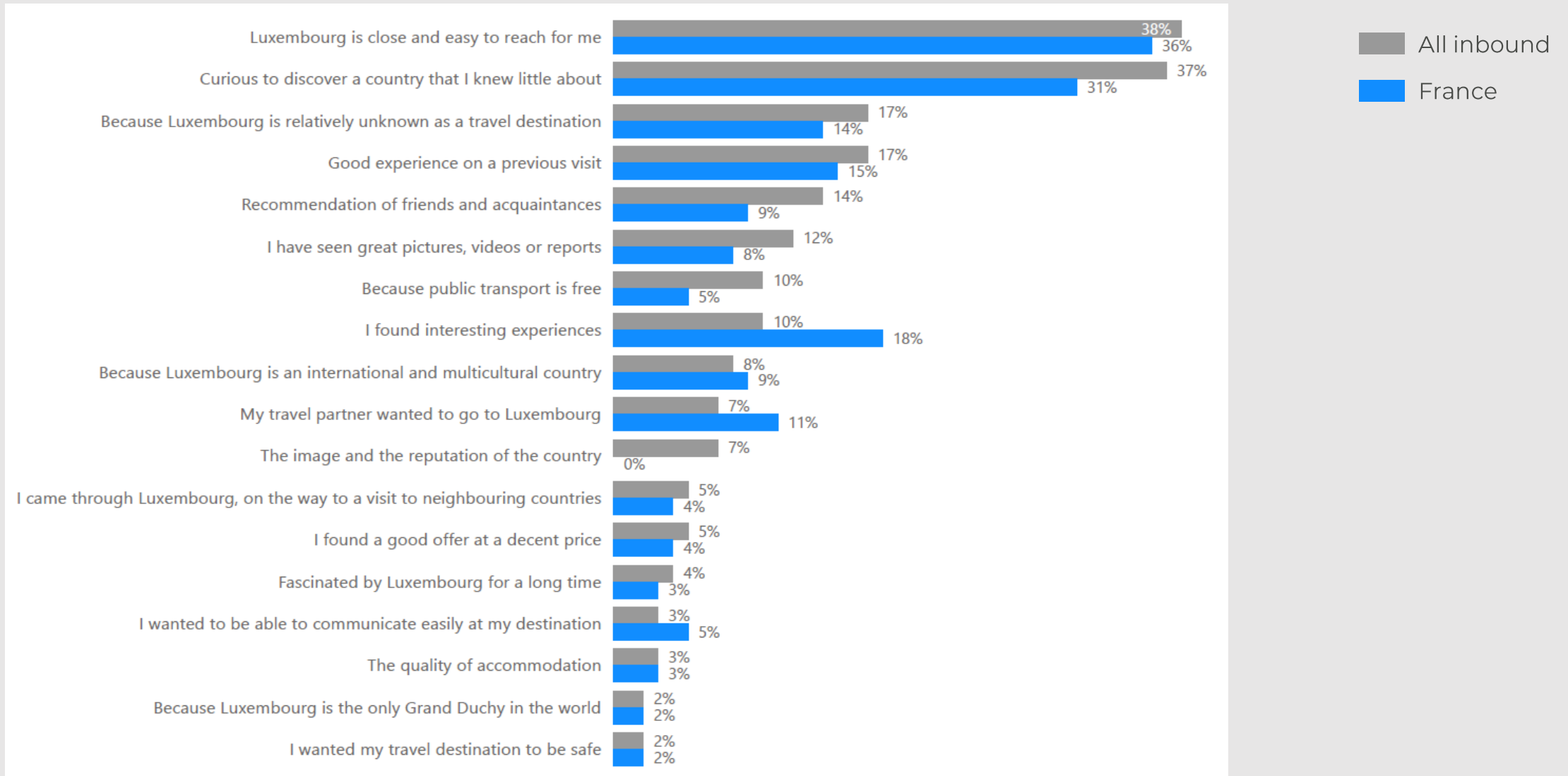
## Main purpose of overnight trip (if not holiday)

● All Inbound ● France



# Key decision criteria for choosing Luxembourg

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

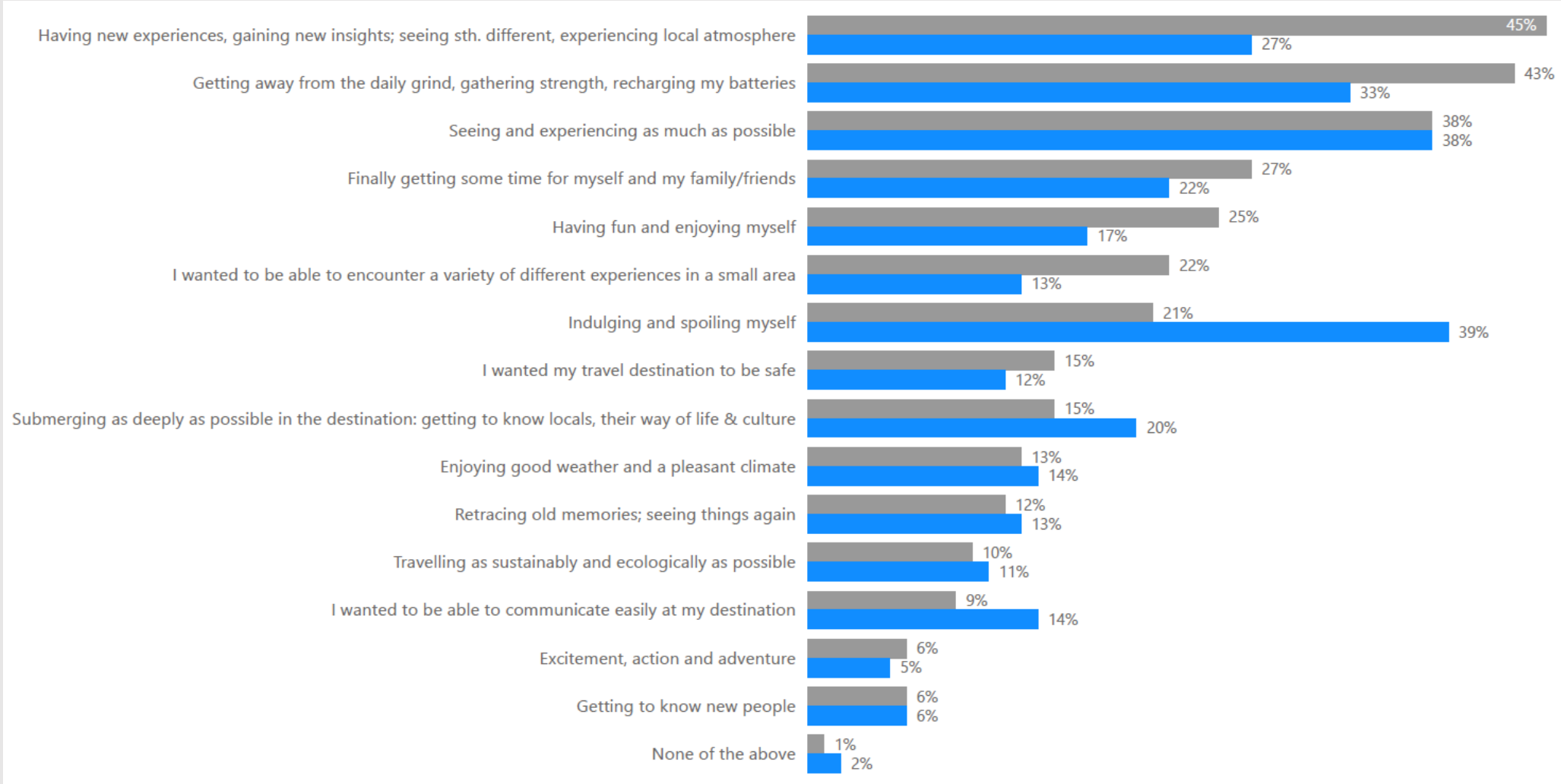


# Key travel motives

## Inbound leisure visitors with overnight, 2023-2024



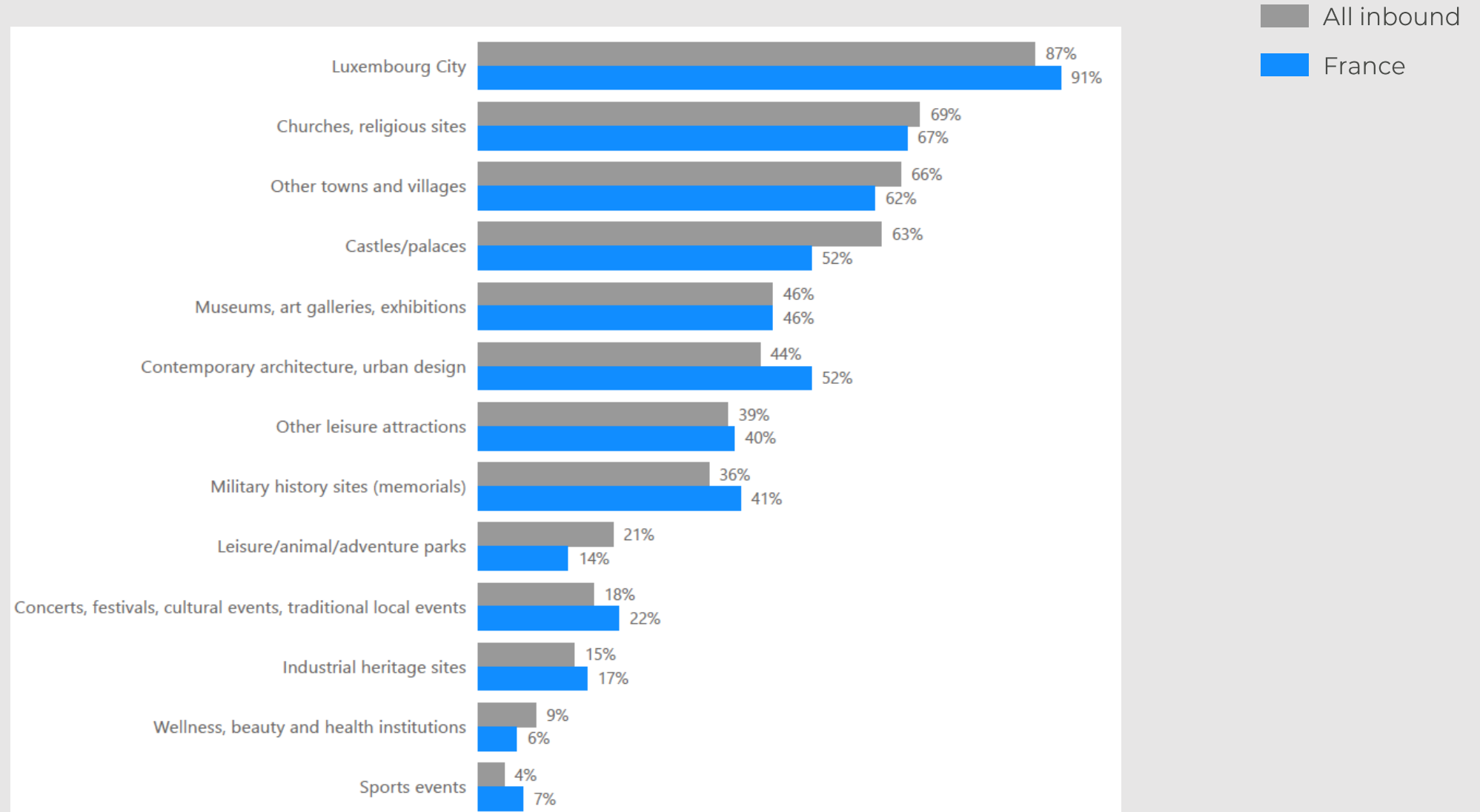
■ All inbound  
■ France





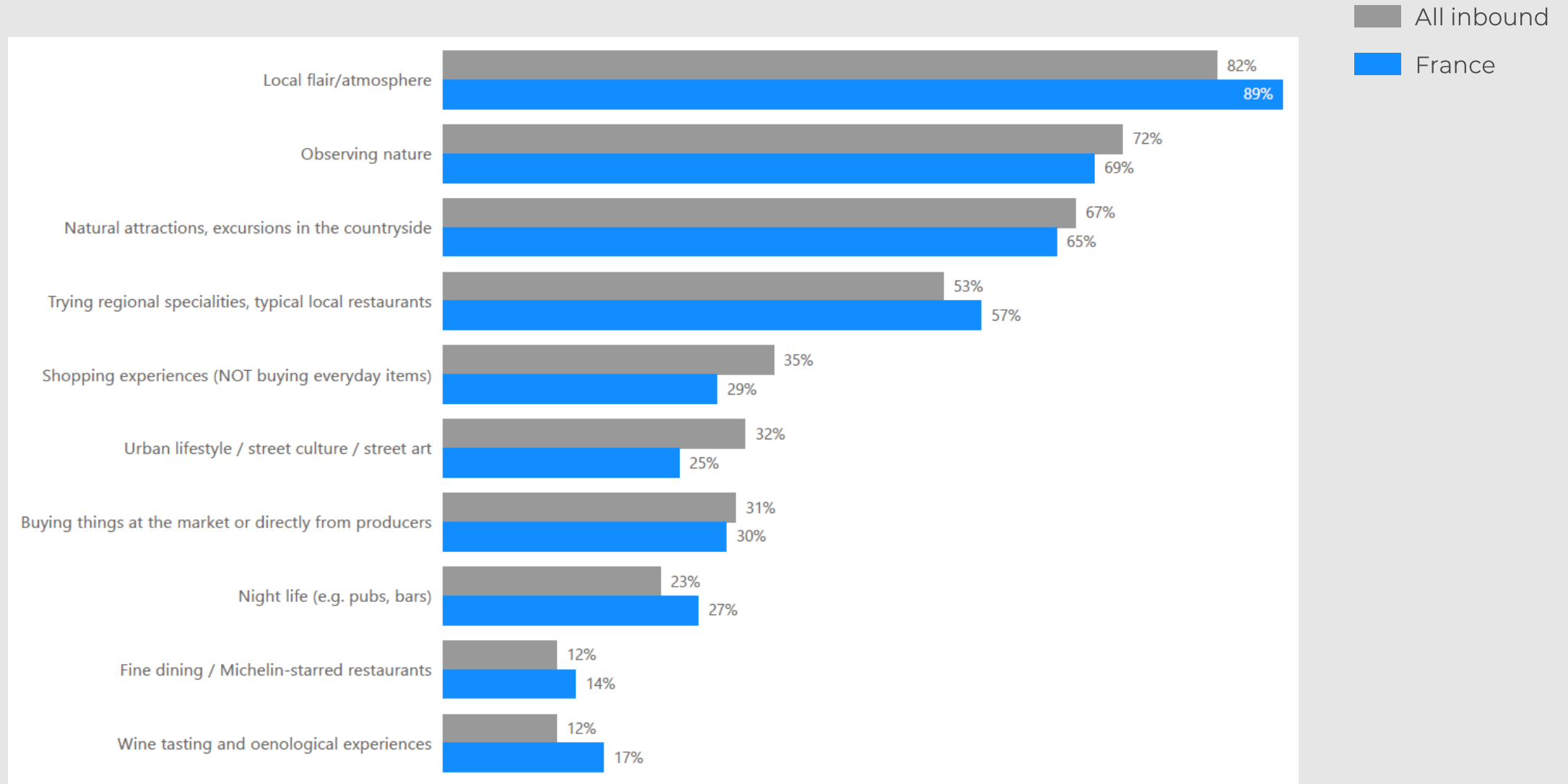
# Type of places visited in Luxembourg

## Inbound leisure visitors with overnight, 2023-2024



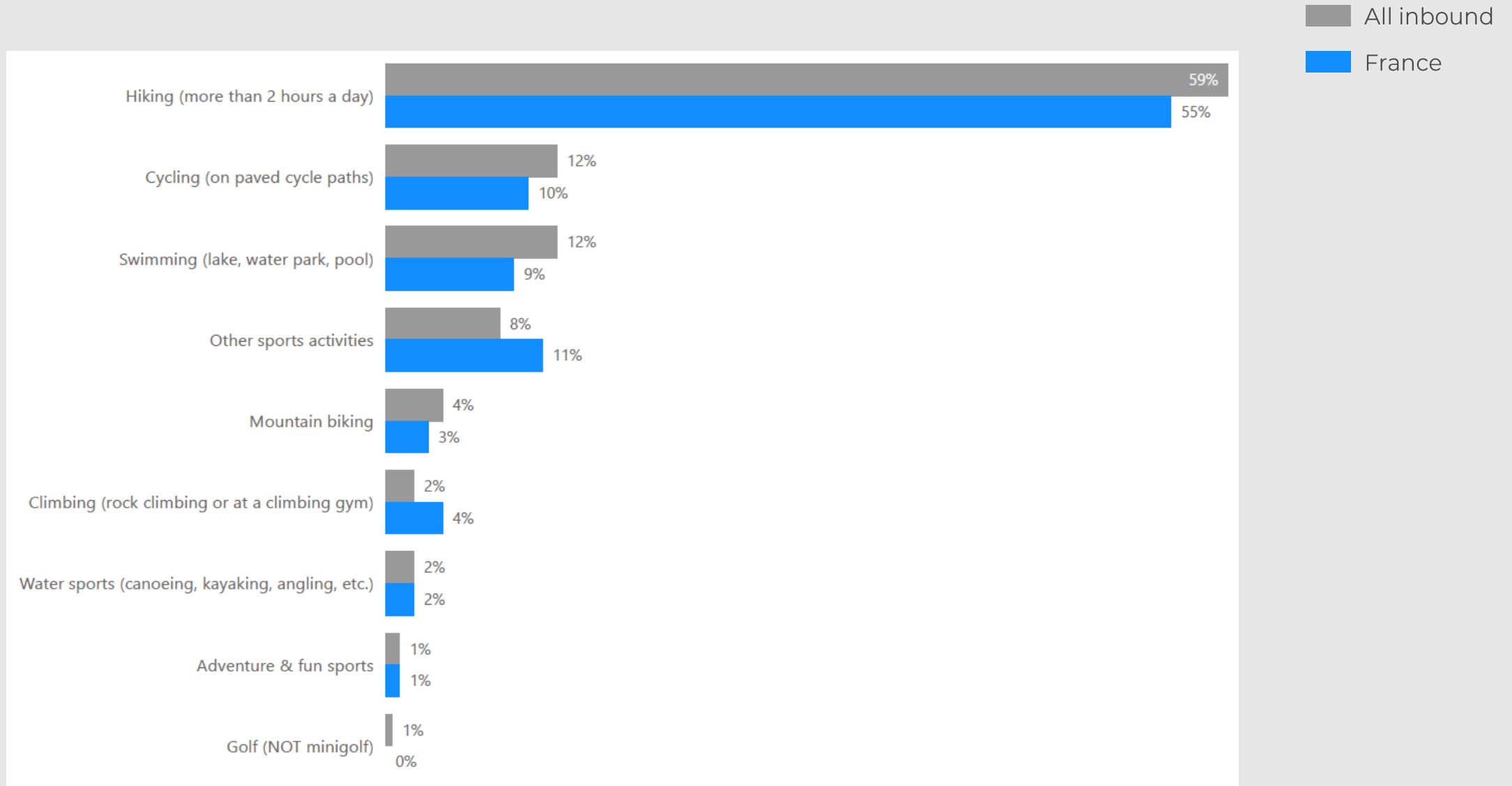
# Non-sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



# Sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



# Age groups

## Inbound leisure visitors with overnight, 2023-2024

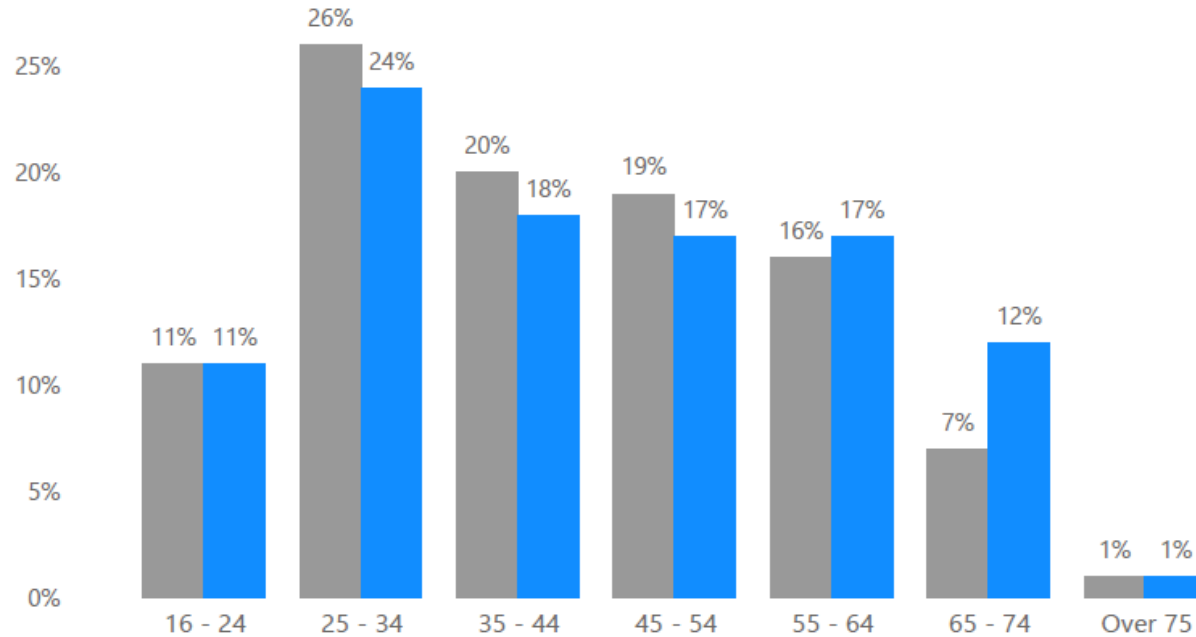


■ All inbound

■ France

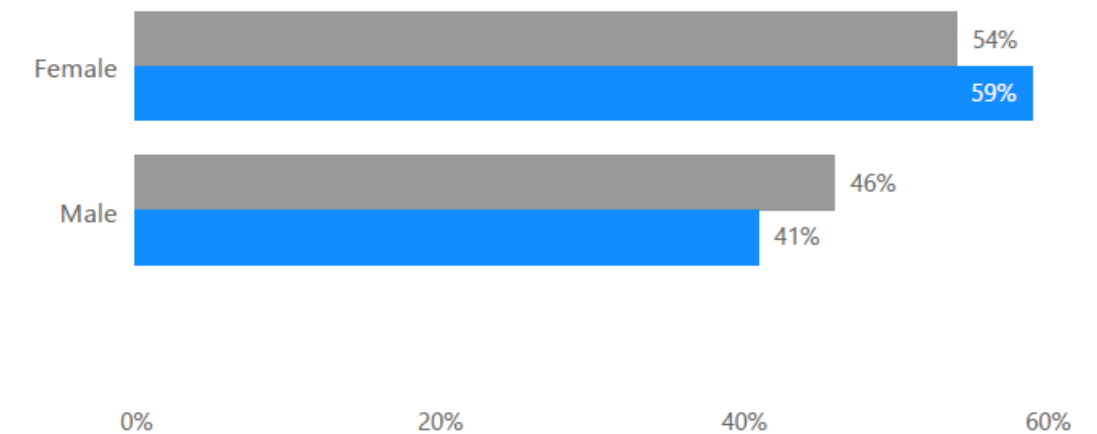
### Age

● All Inbound ● France



### Gender

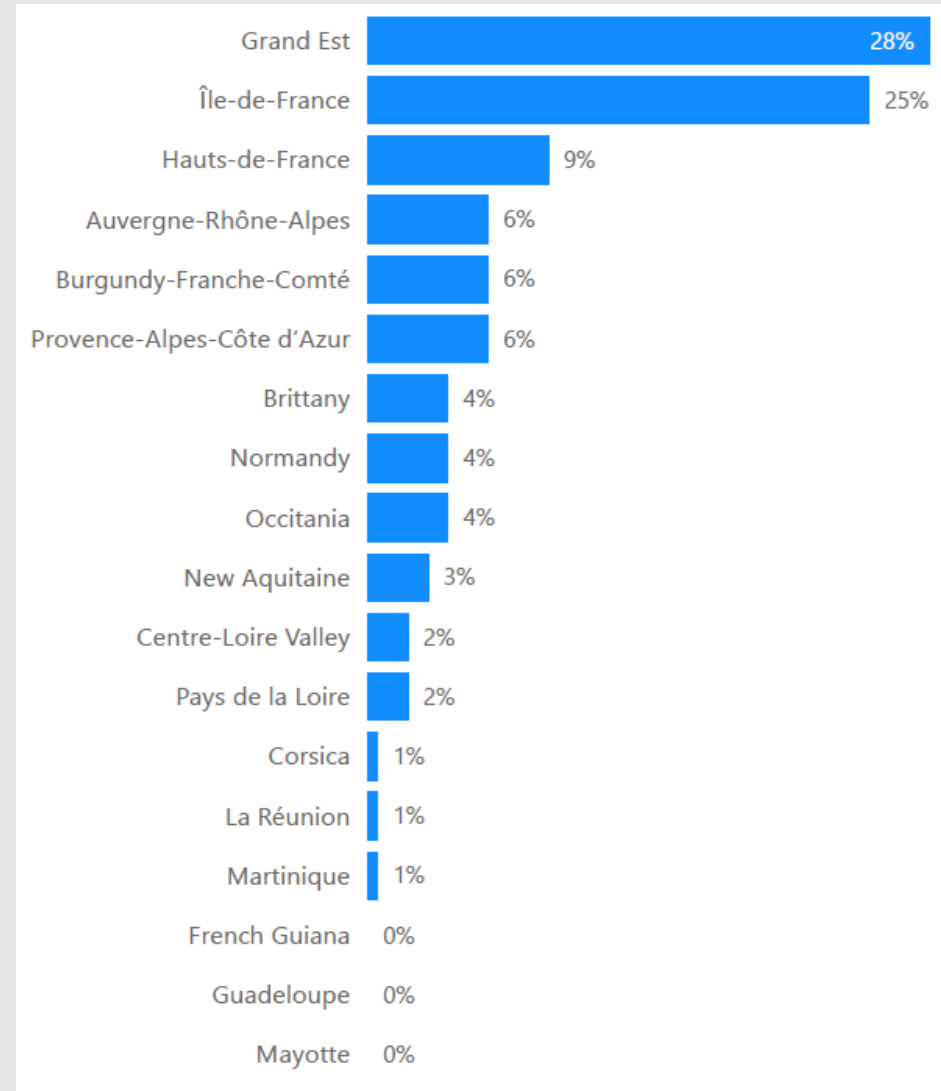
● All Inbound ● France





# Region of origin

Inbound leisure visitors with overnight, 2023-2024

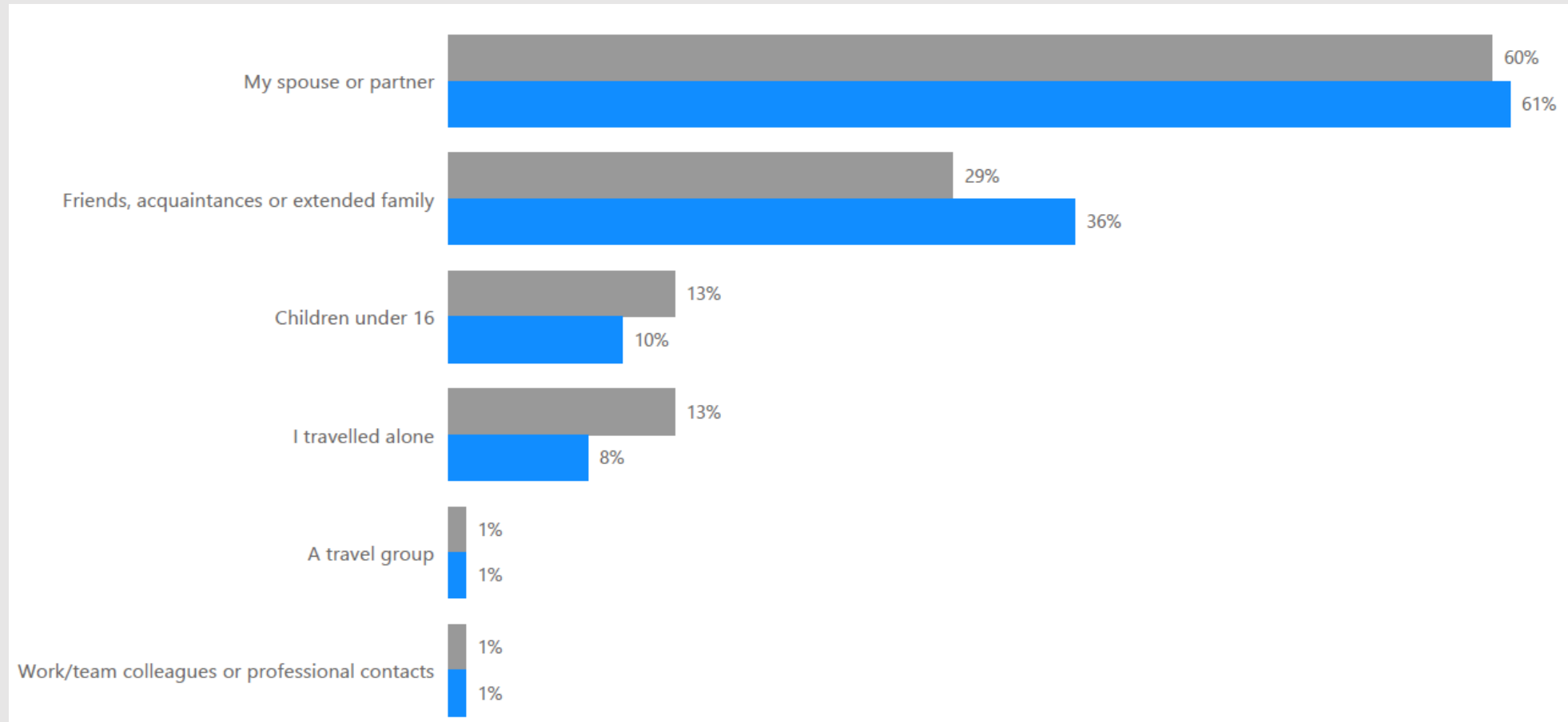


# Travel party

## Inbound leisure visitors with overnight, 2023-2024



■ All inbound  
■ France



# Transport, new visitors and cross-border trips

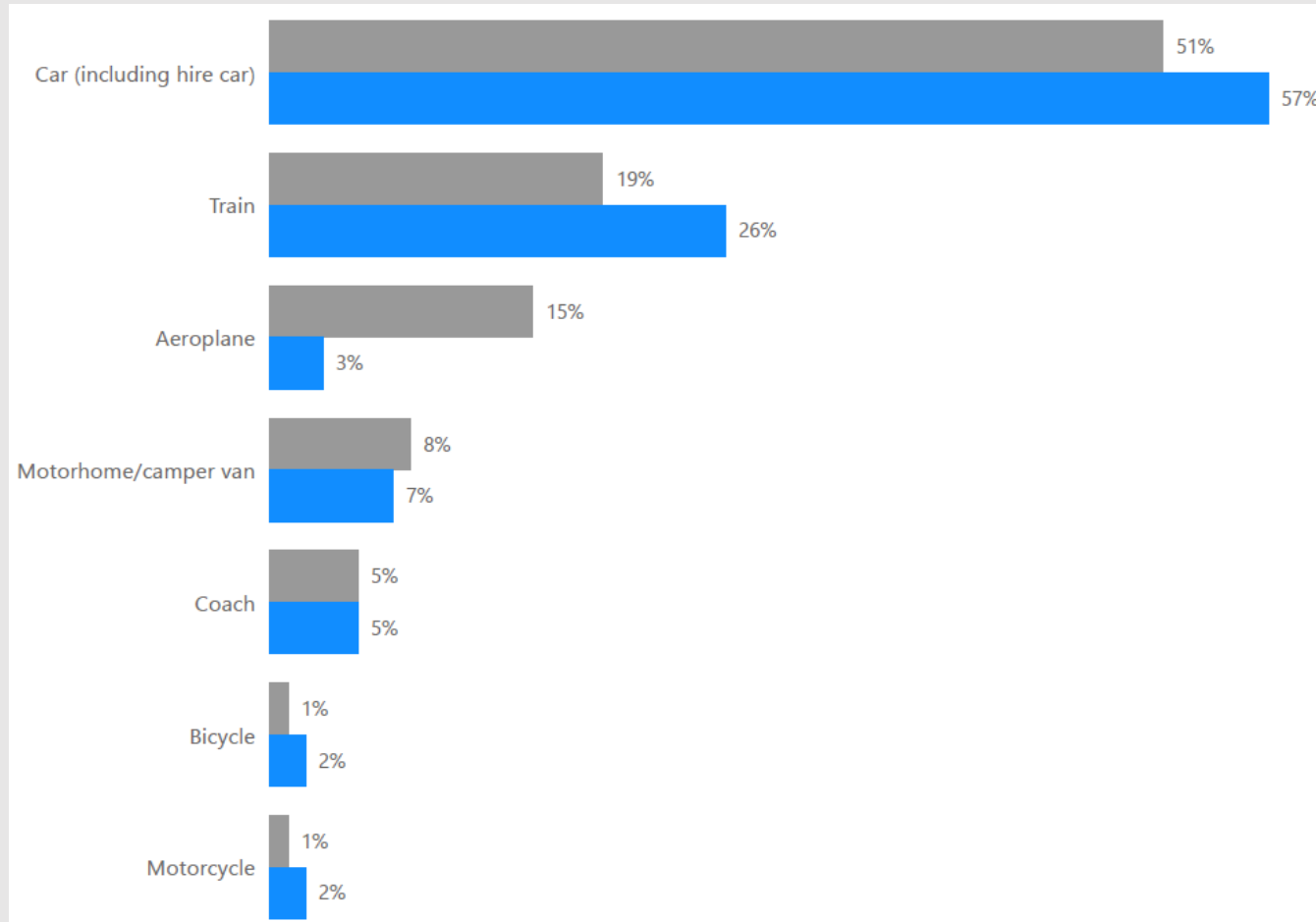
Inbound leisure visitors with overnight, 2023-2024



## Mode of transport to access Luxembourg

■ All inbound

■ France



### 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

# Expenditure

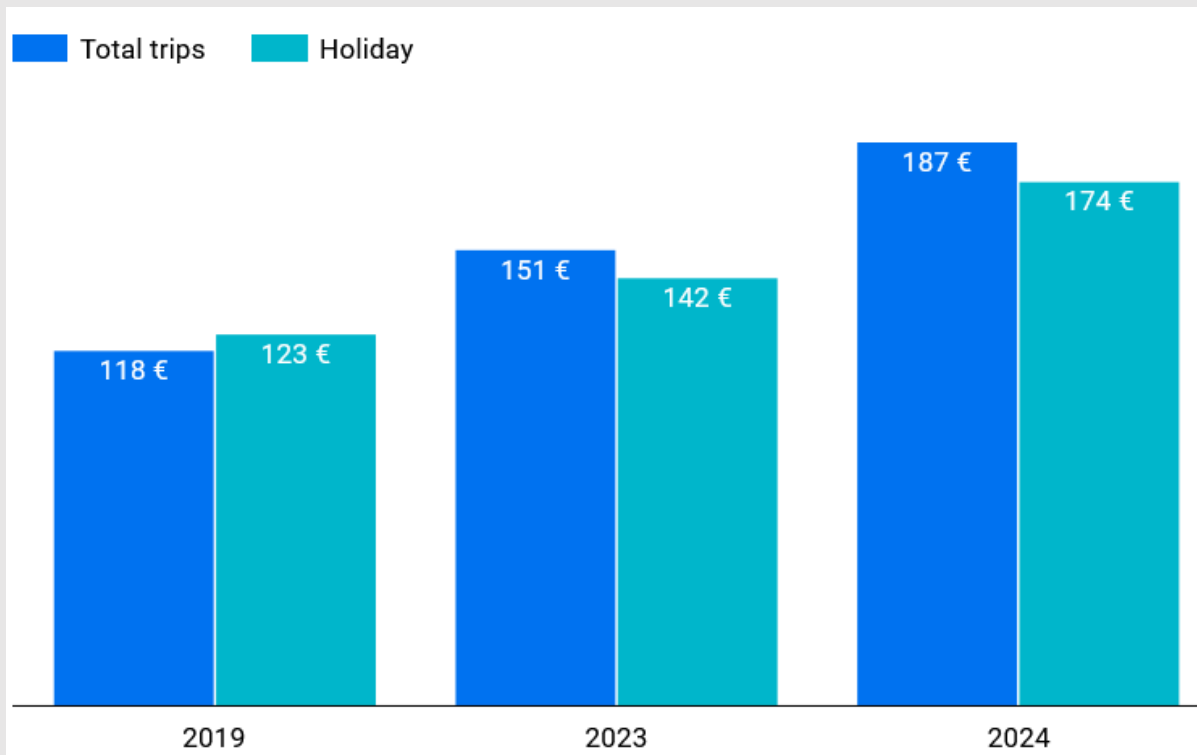
Inbound trips to Luxembourg with overnight (all accommodation)



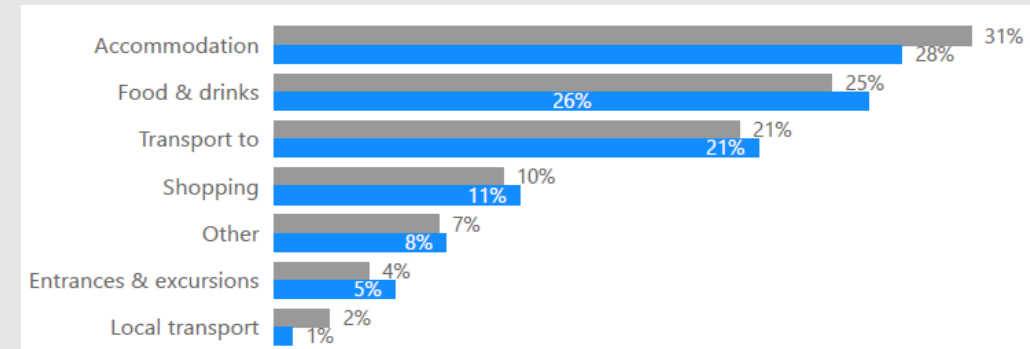
■ All inbound

■ France

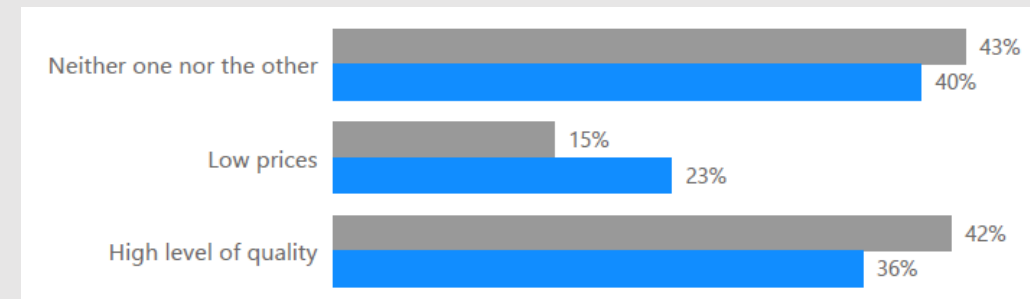
## Average expenditure/pers./day



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

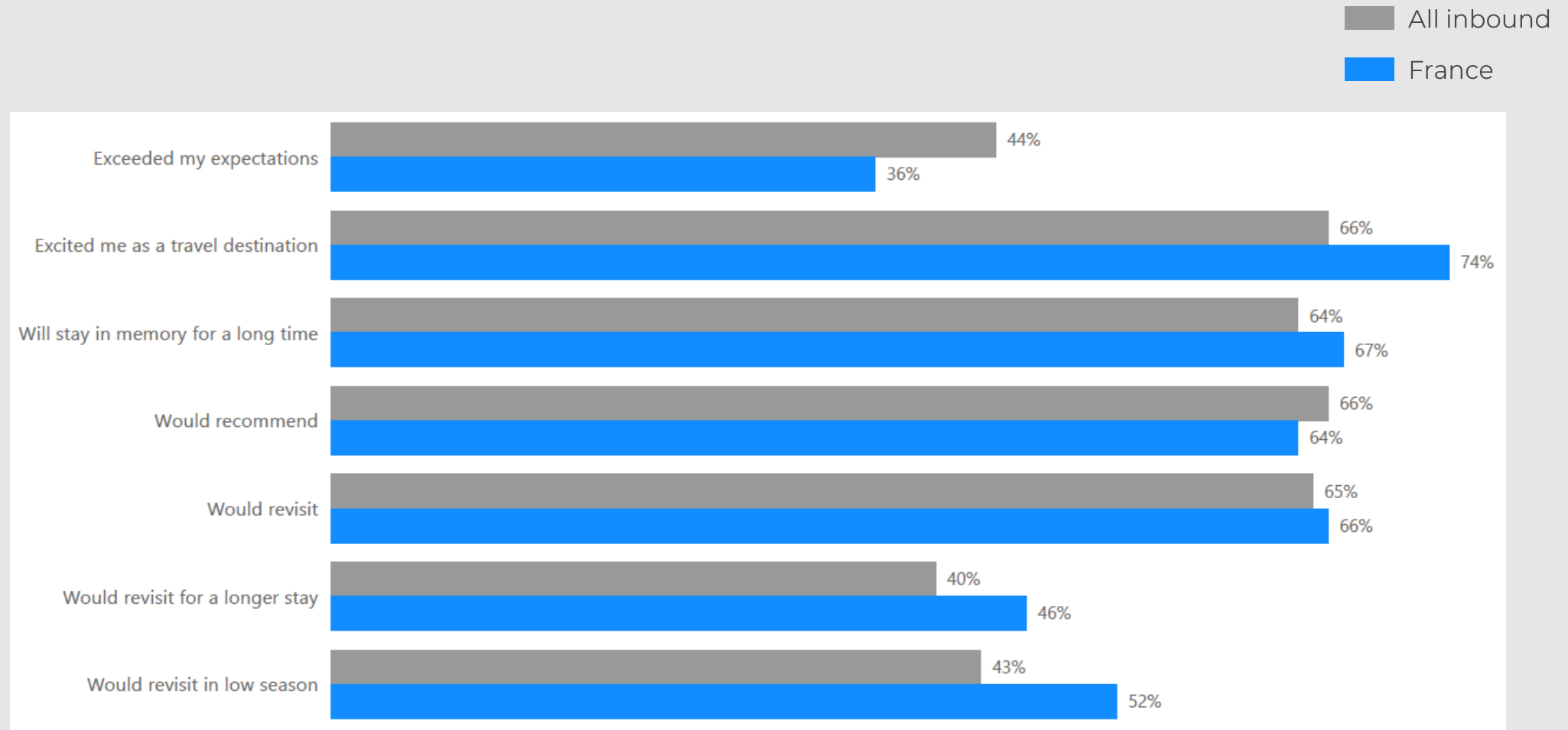


## Quality vs. price-orientation of leisure inbound visitors, 2023-2024



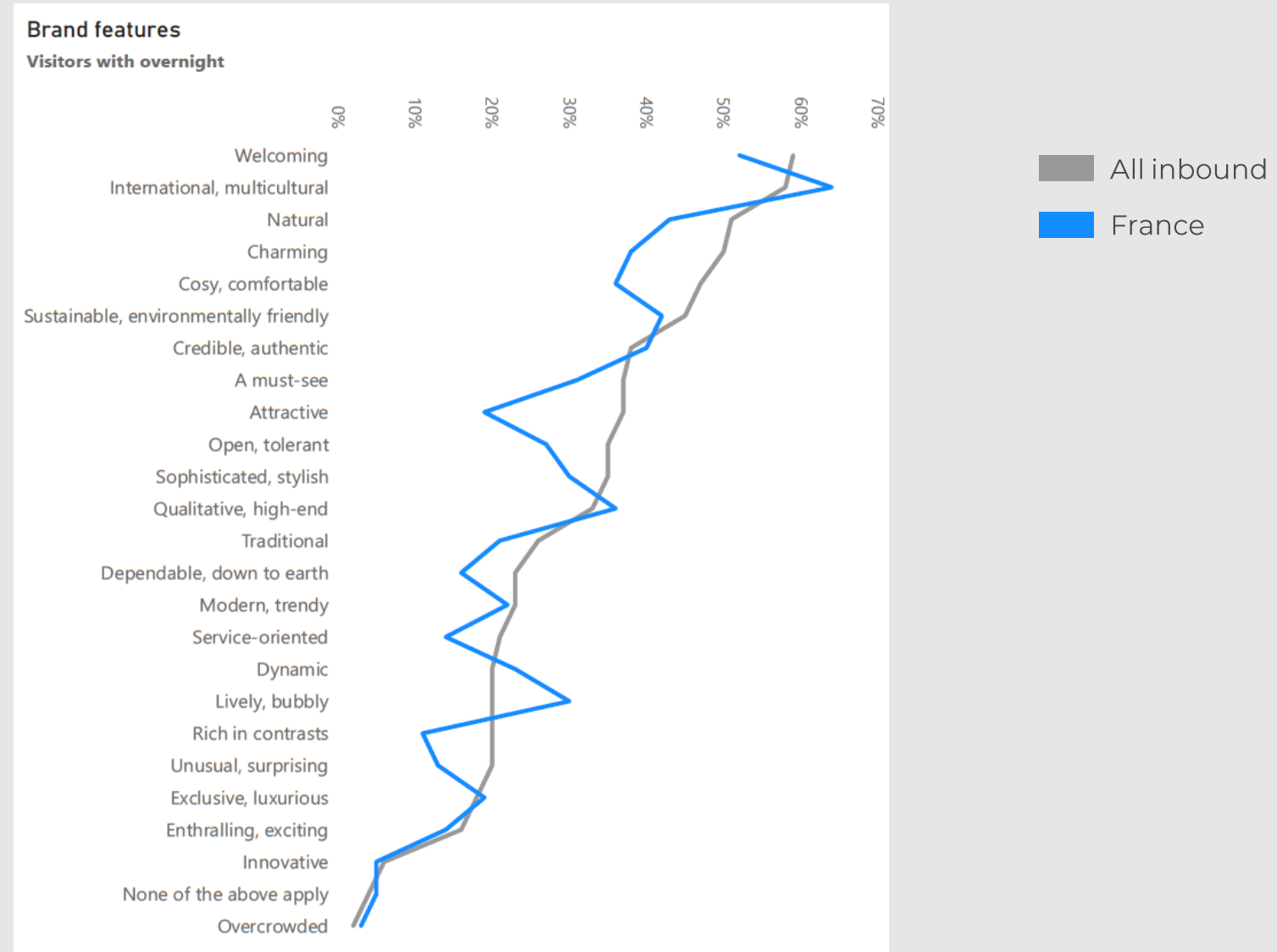
# Visitor satisfaction and recommendation

Inbound leisure visitors, 2023-2024



# Brand features perception

Inbound leisure visitors with overnights, 2023-2024



# LFT Target Segments



France  
All inbound

Explorers



Nature-Loving Actives



Relaxation Seekers



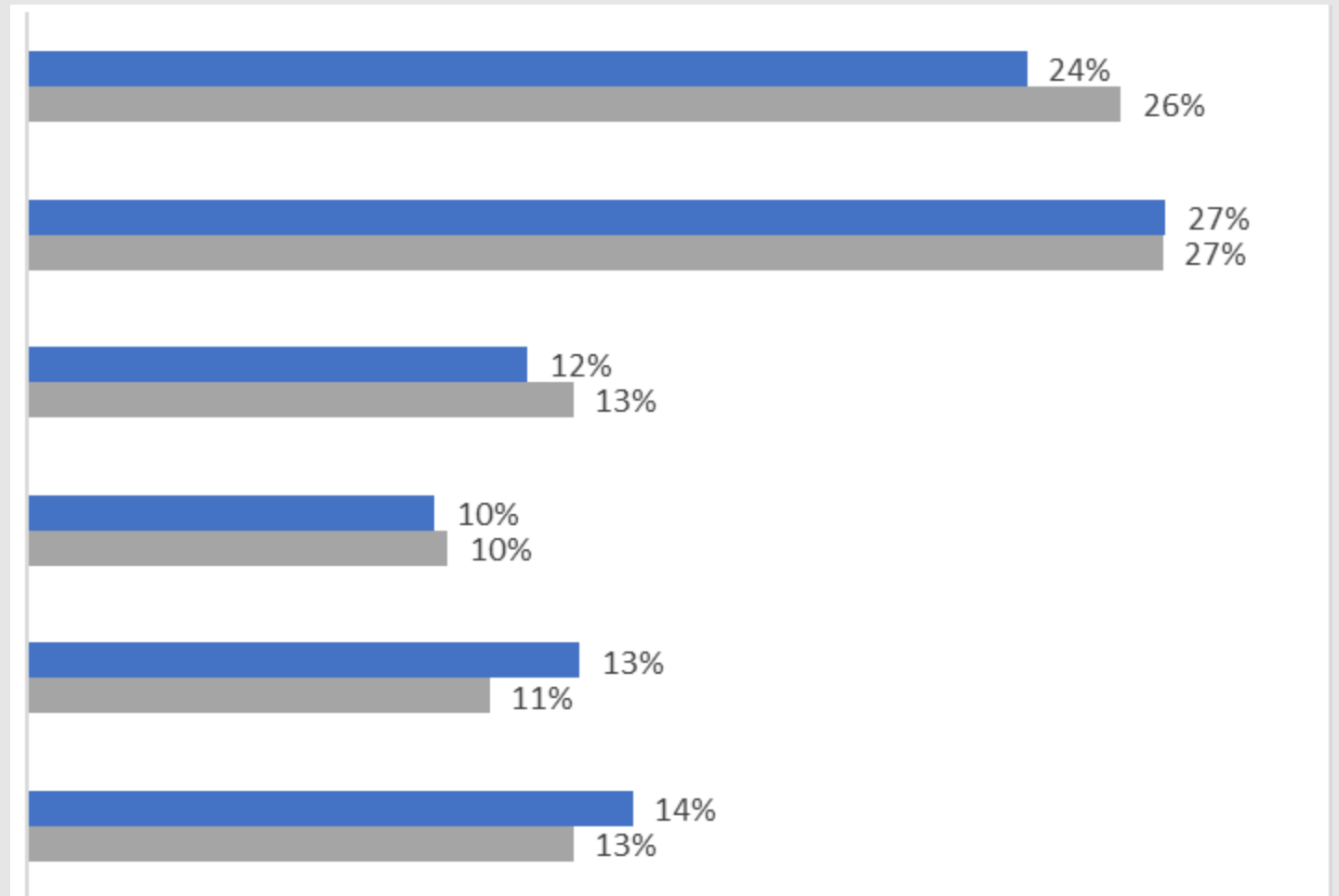
Short Breakers



Perfection Seekers



Leisure Oriented



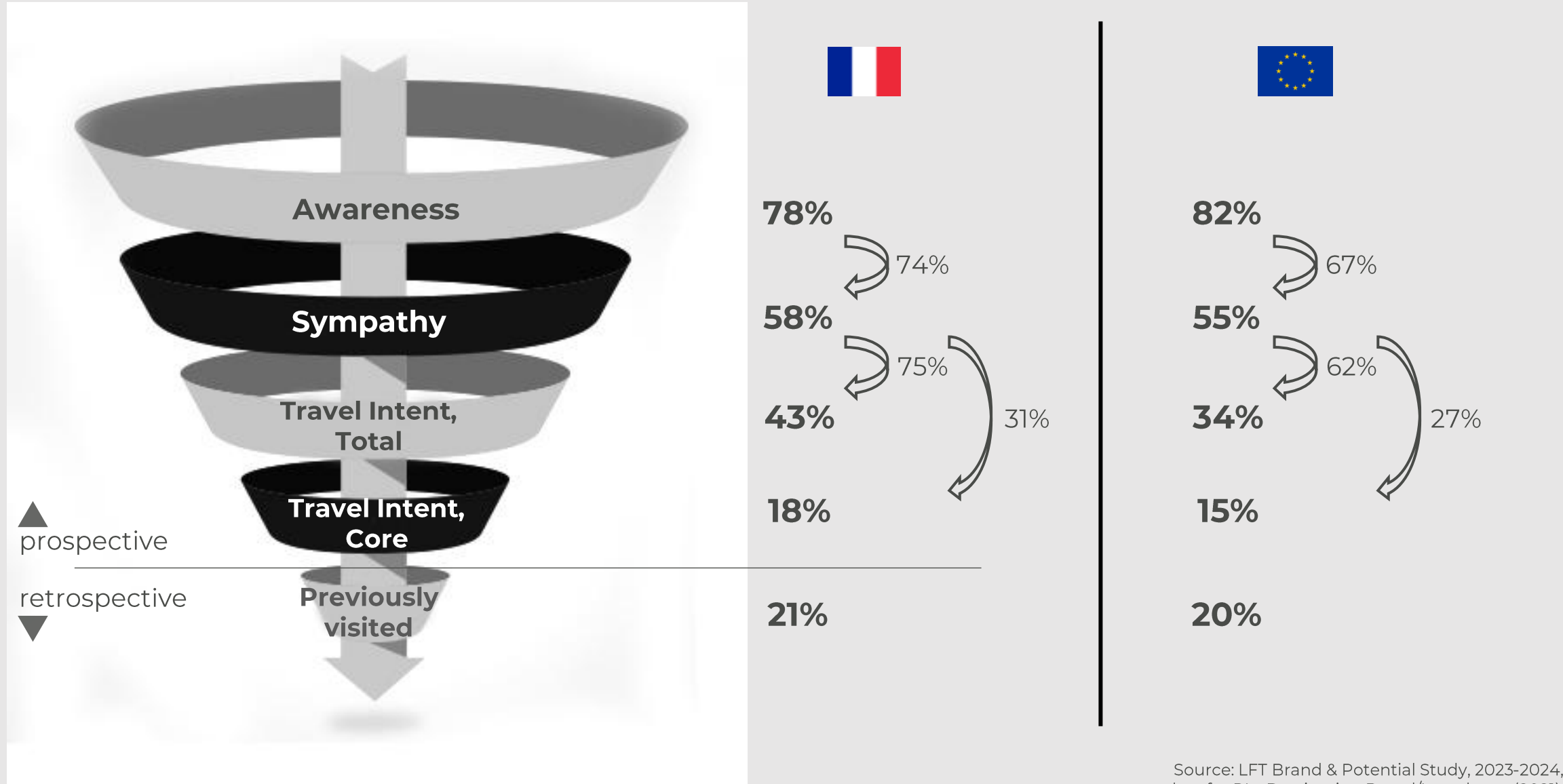


# **Target segments, Brand & Growth Potential**



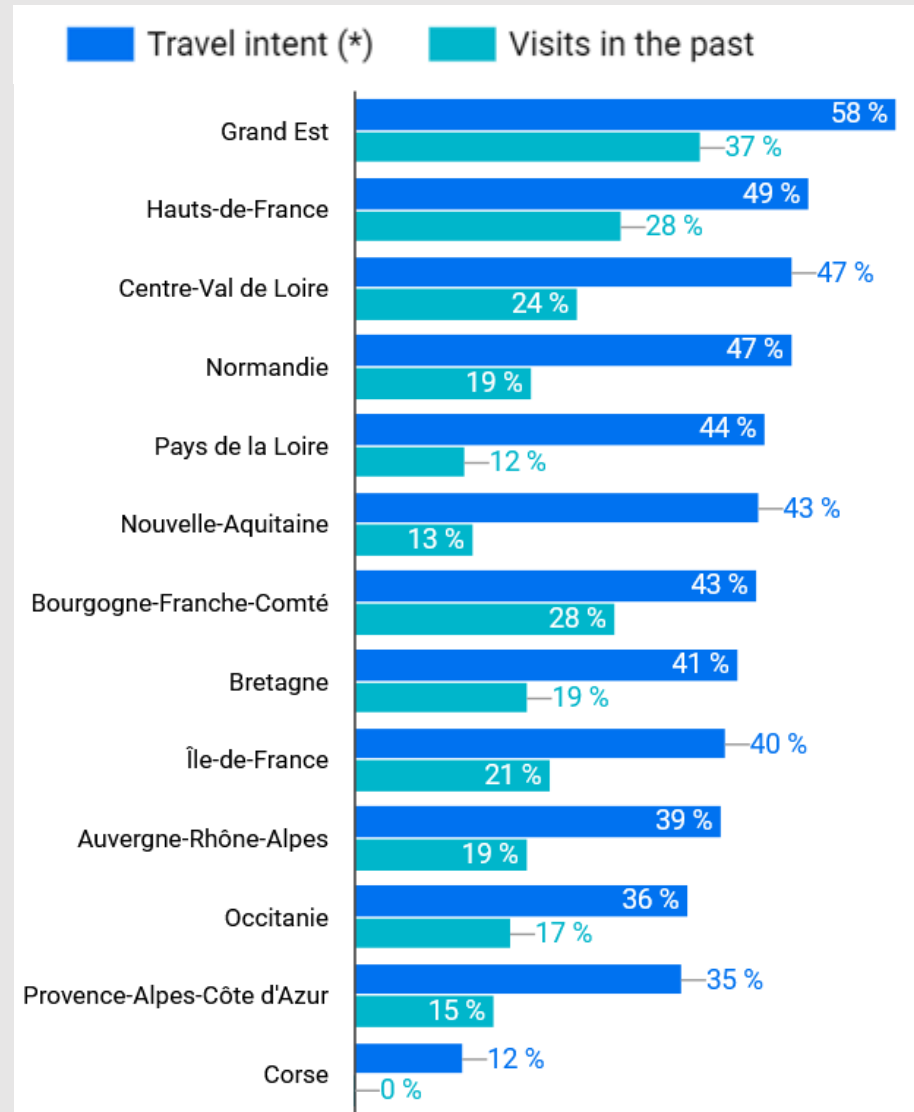
# Destination Luxembourg - Brand Funnel 2024

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






# Regional origin 2024

## Past visitors and future potential



# General theme interest (\*)



Theme			
	Rank	Rank	% interested
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).

# Luxembourg's Theme Competence (\*)



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

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

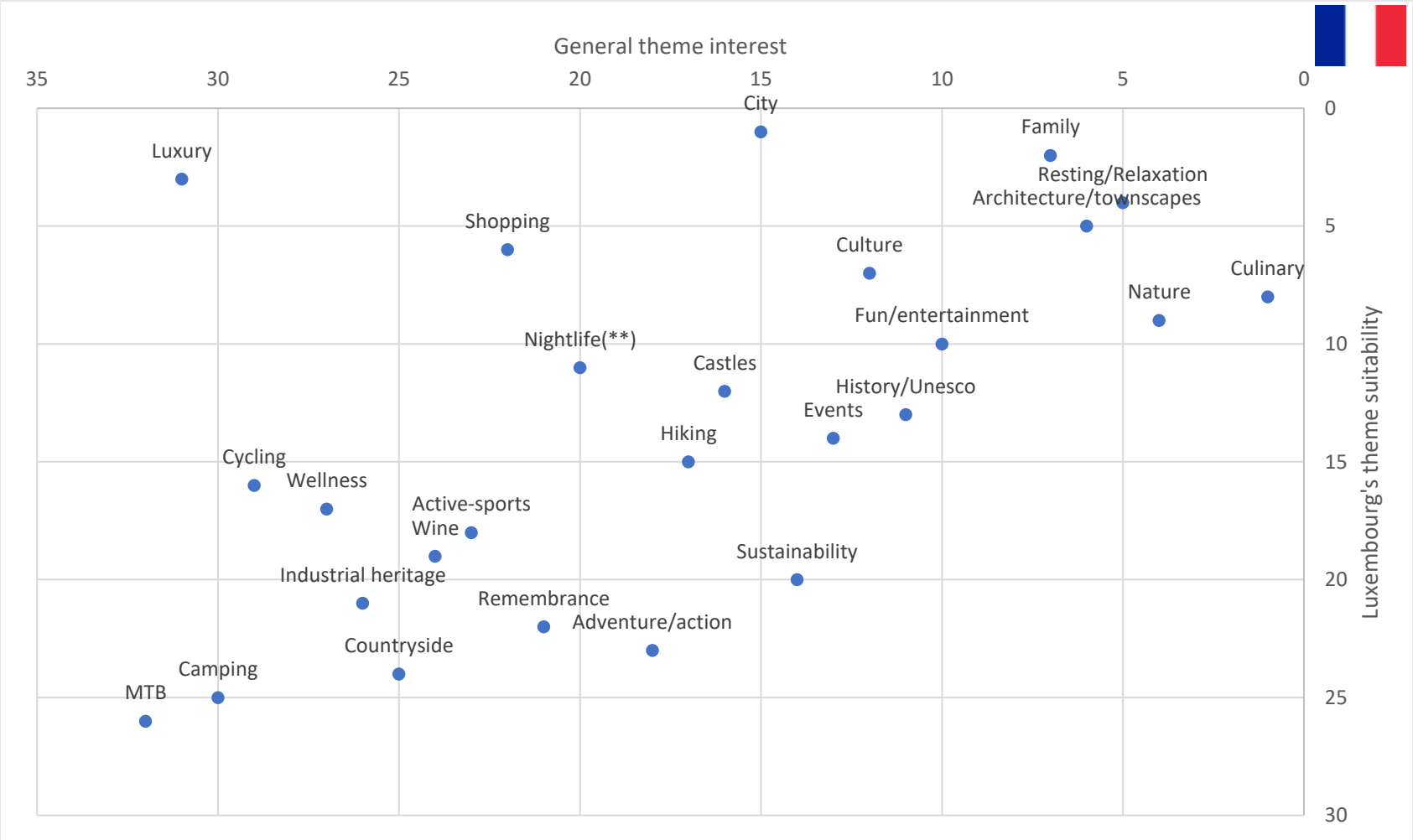
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

(\*\*) 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
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.



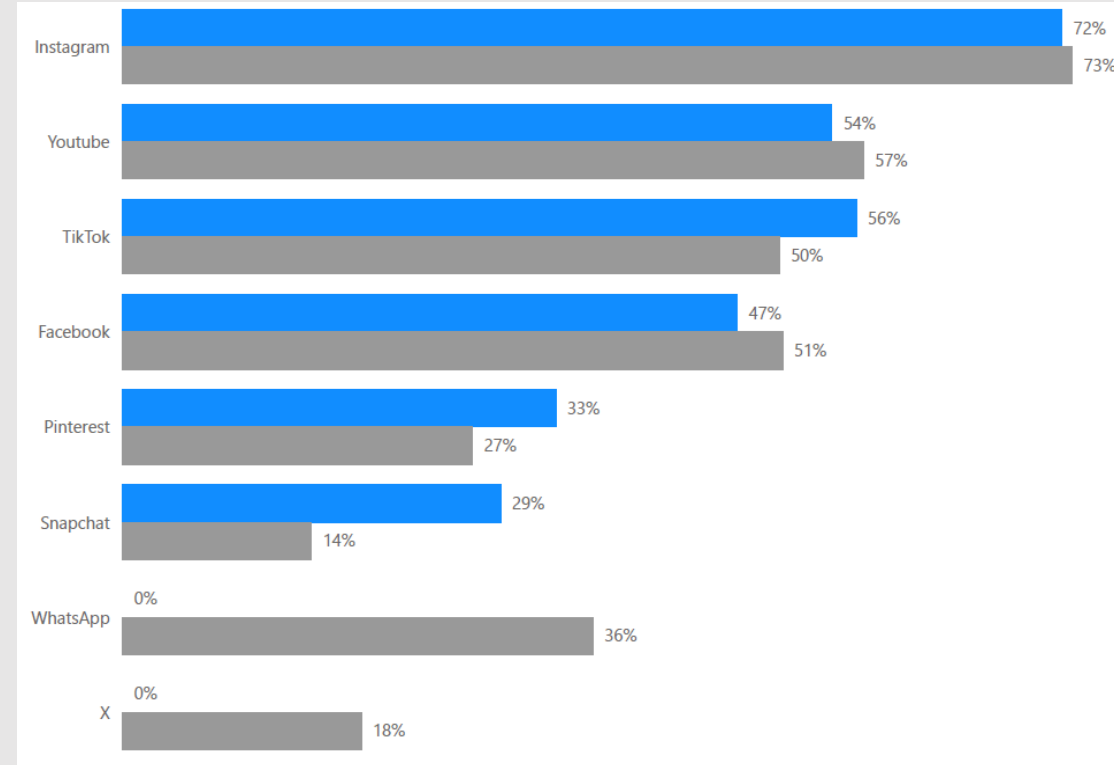
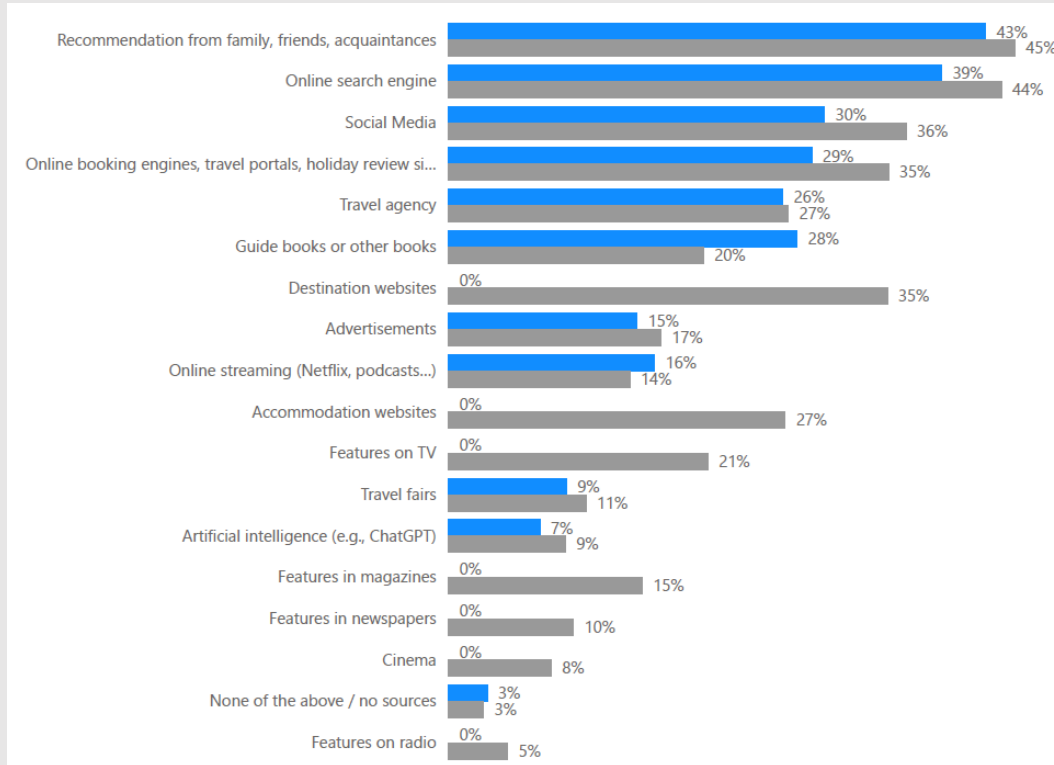
# Trip organisation and preferences (1)

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



France  
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)



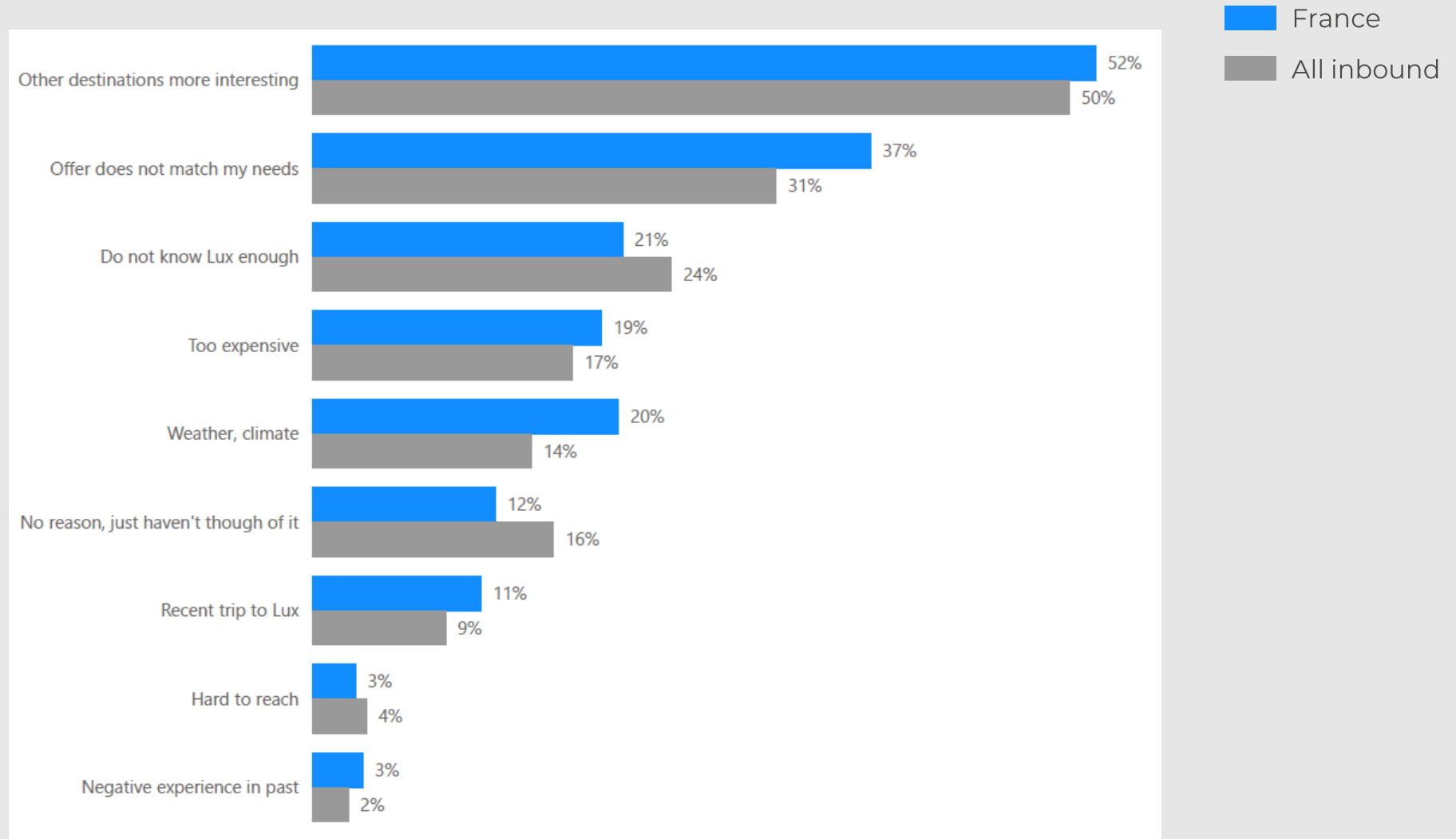


## Trip organisation and preferences (2)

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



### Reasons for not considering Luxembourg as a destination

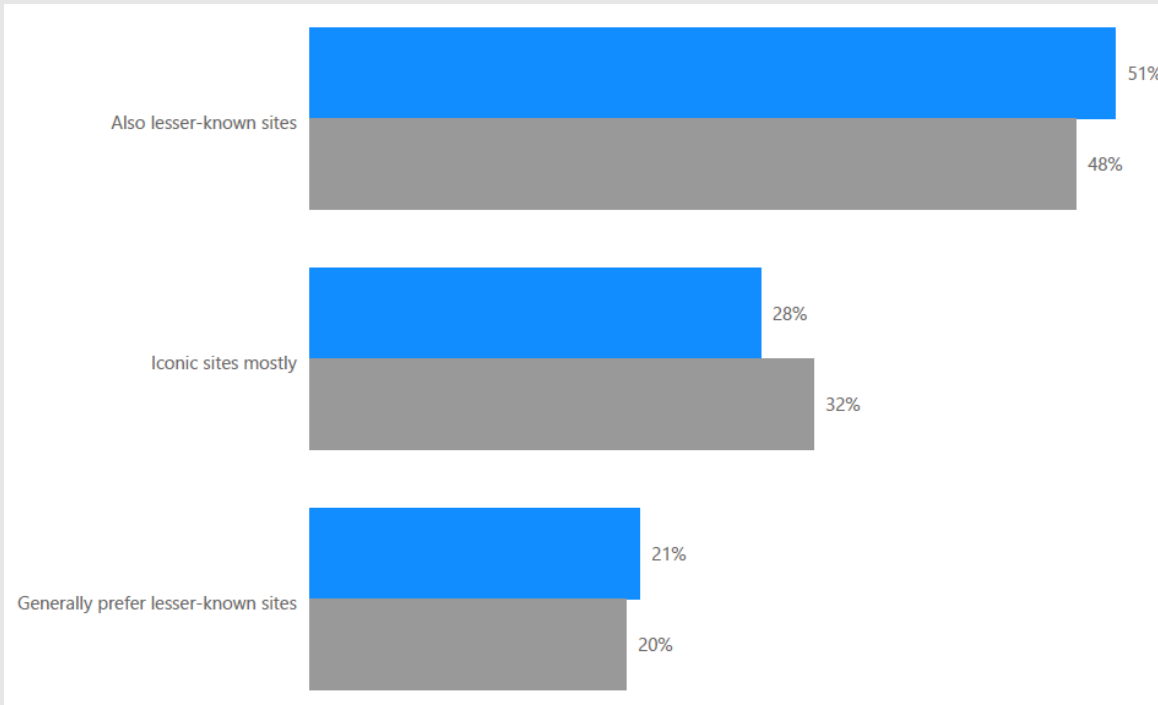


# Trip organisation and preference (3)

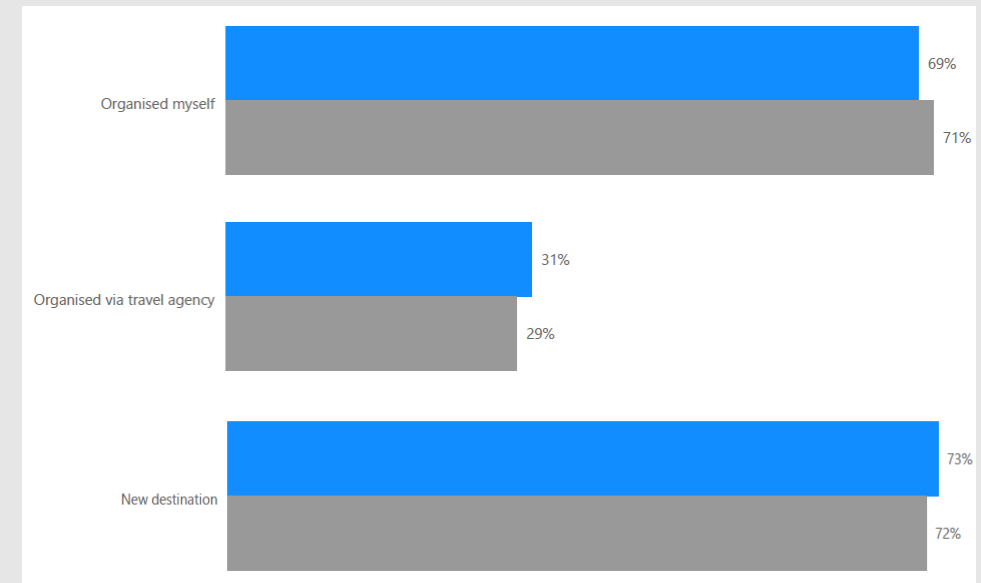
— Average **European source markets**, total vs. France



## 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



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