



Luxembourg for Tourism

Market profile

GERMANY

2024

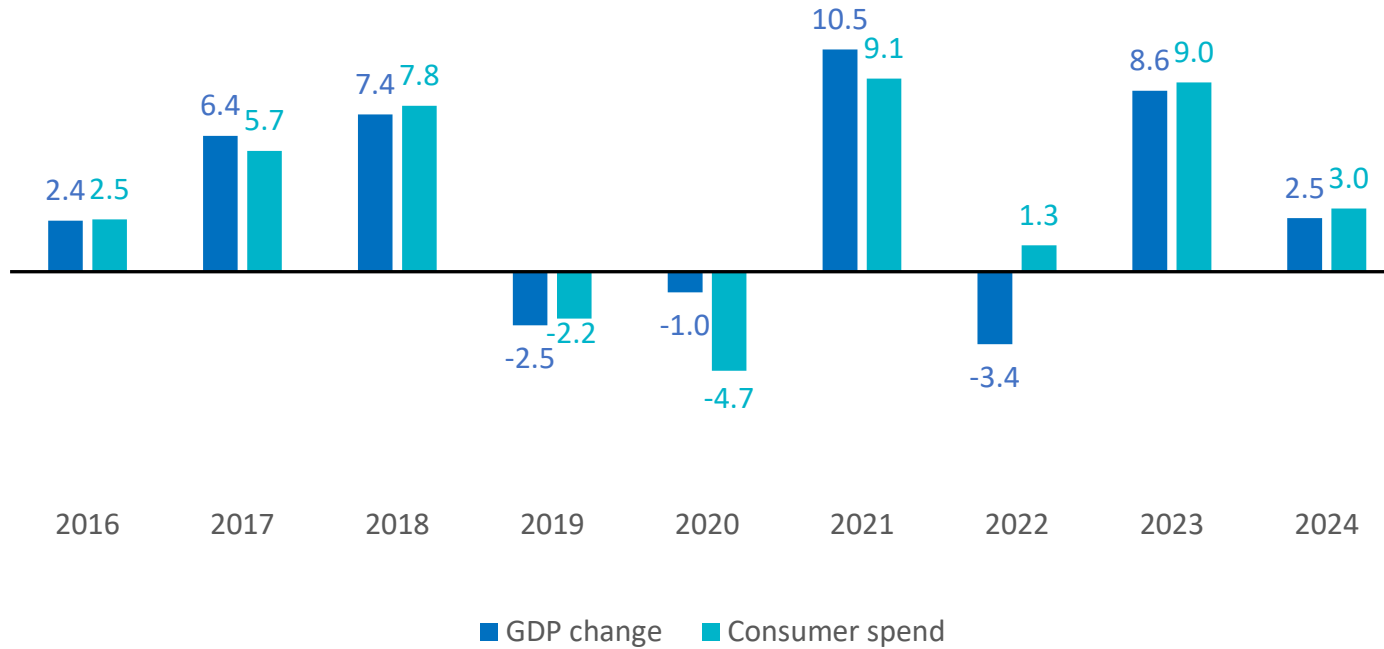


Economic indicators & General Travel Demand

Economic indicators – General travel demand



GDP and consumer spending, % annual change



Economy & population

GDP (\$) per capita
56,157.61

Unemployment (%)
5.98

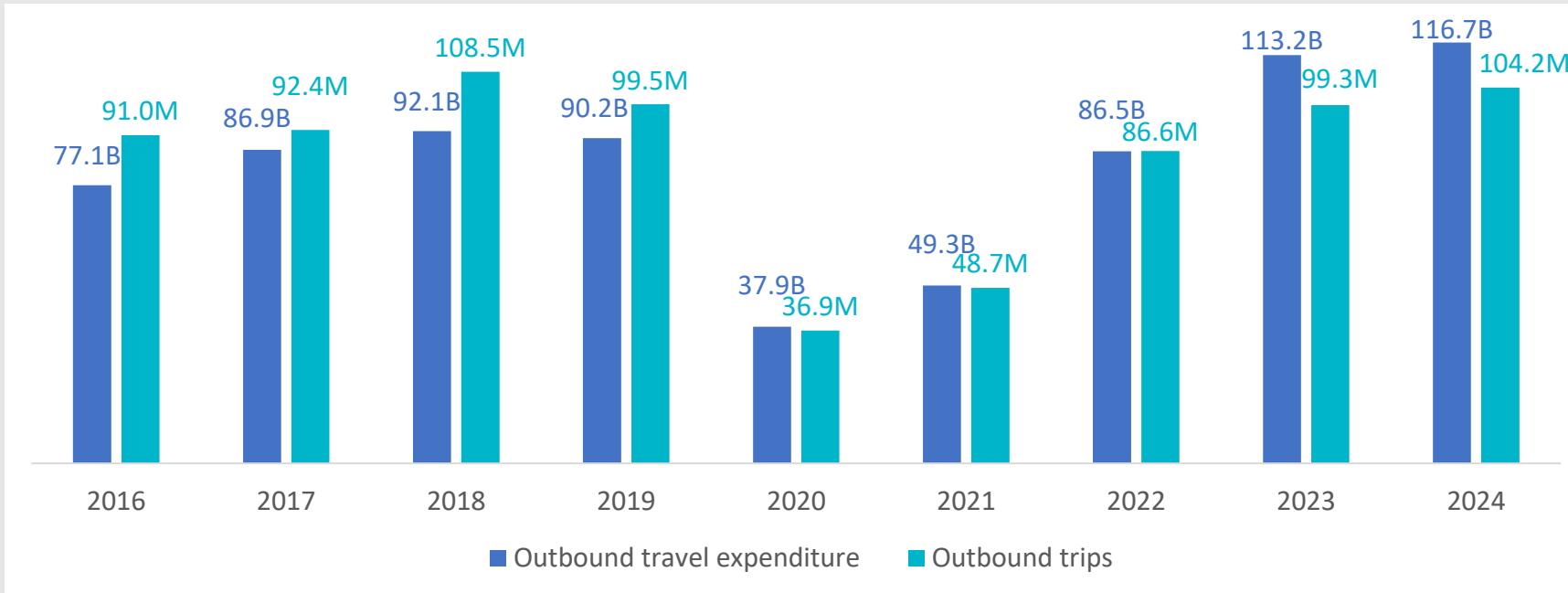
Inflation(%)
2.27

Population
83,473,380

Economic indicators – General travel demand



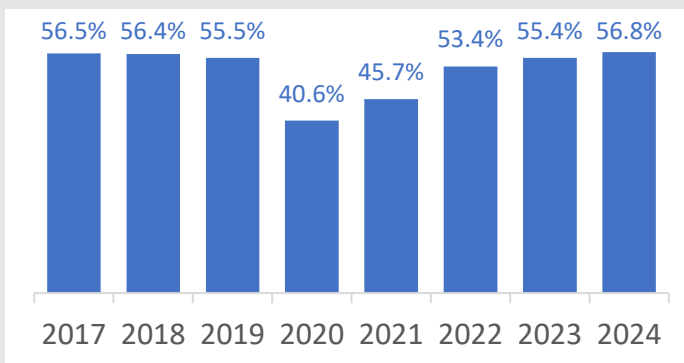
Outbound trips and travel expenditure



Outbound travel intensity
1.25 trips
per inhabitant (2024)

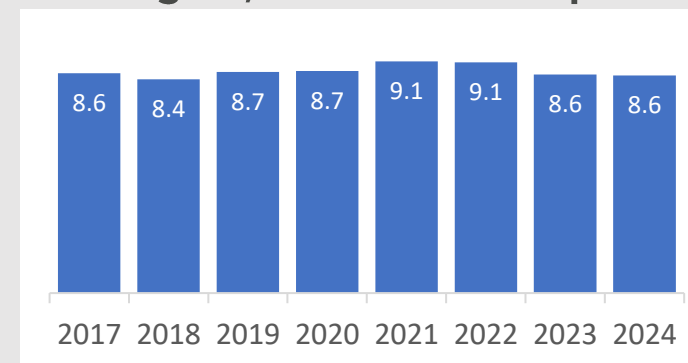
Average spend
per outbound trip (2024)
1,119 \$

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2024)
83.4%

Average length of stay, nights, all outbound trips



Share of short trips
(1-3 nights),
% all outbound
trips (2024)
22.3%



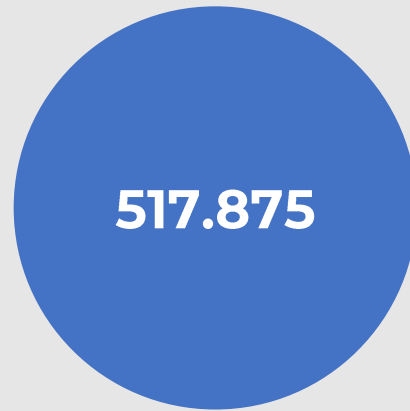
Arrivals & nights in paid accommodation

Nights in paid accommodation

2024 and 2018-2024

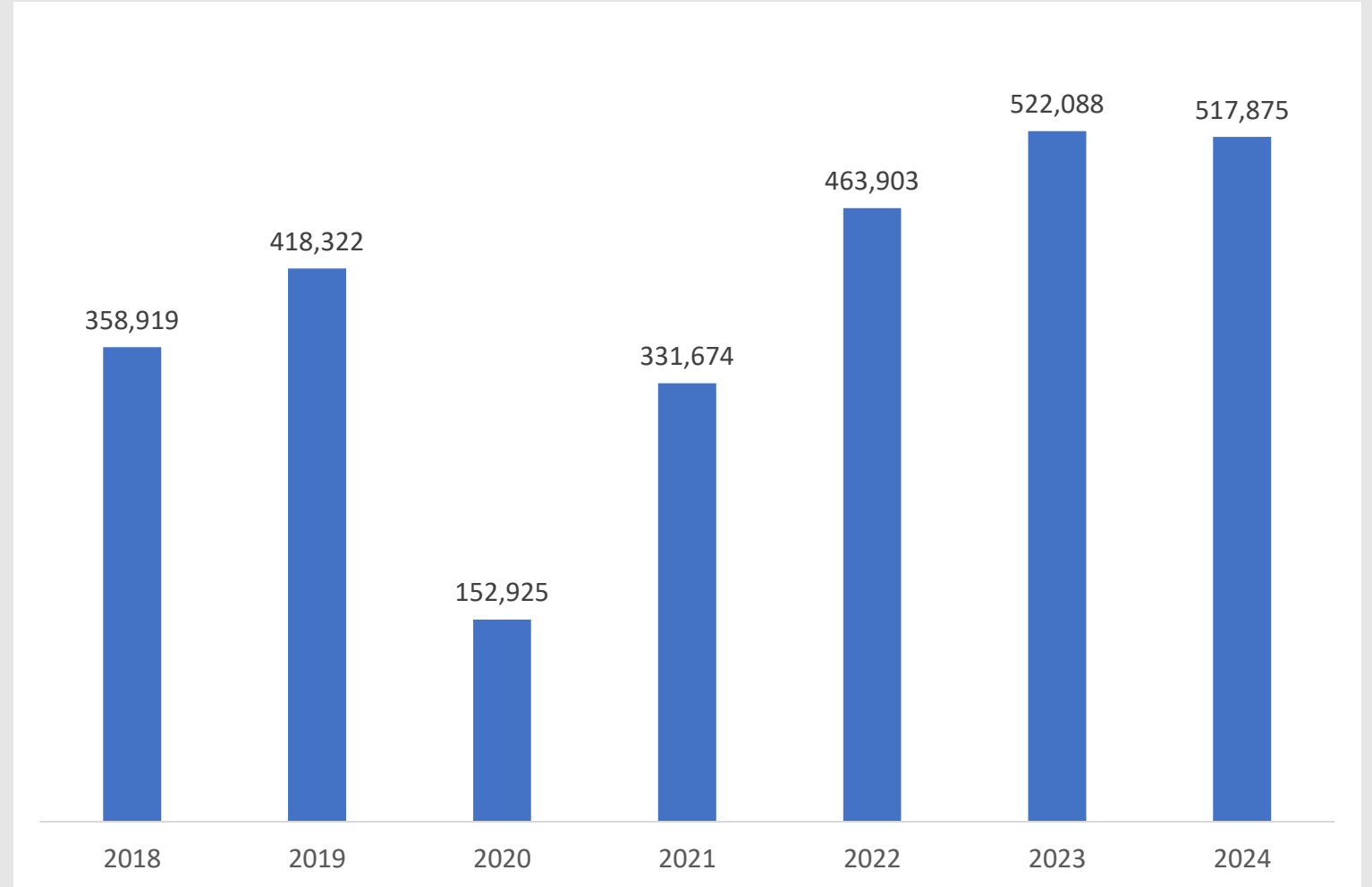


Nights,
paid accommodation, 2024



-1% (vs. 2023)

+24% (vs. 2019)

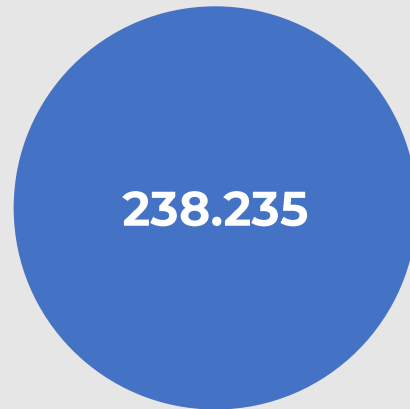


Arrivals in paid accommodation

2024 and 2018-2024

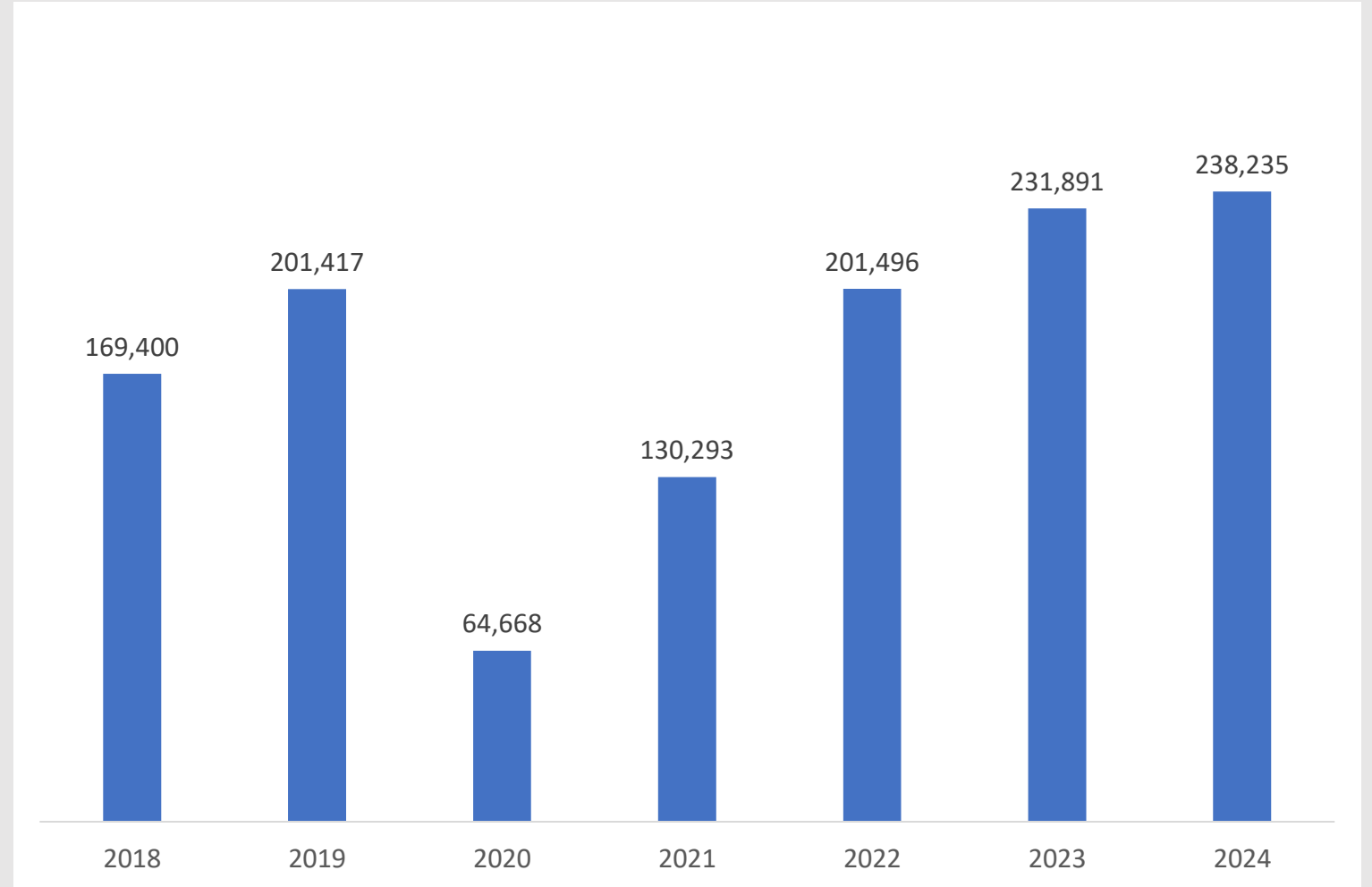


Arrivals,
paid accommodation, 2024



+3% (vs. 2023)

+18% (vs. 2019)



Length of stay, paid accommodation

2024 and 2018-2024

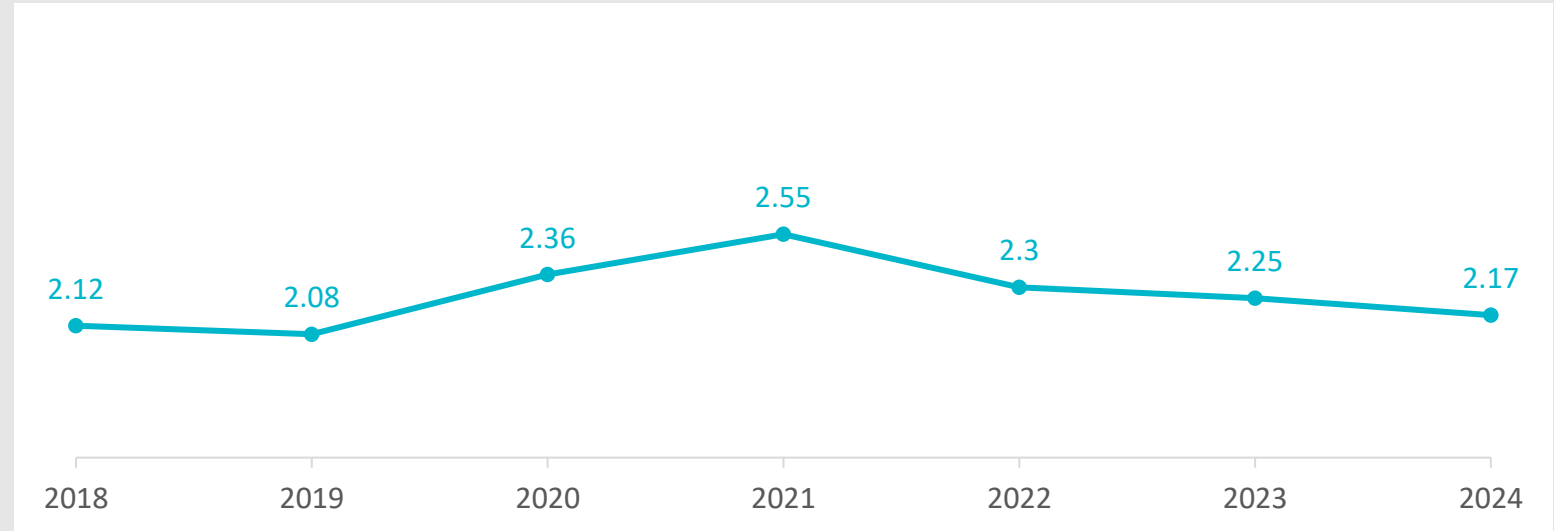


Average length of stay,
paid accommodation, 2024



-0.08 nights (vs. 2023)

+0.09 nights (vs. 2019)

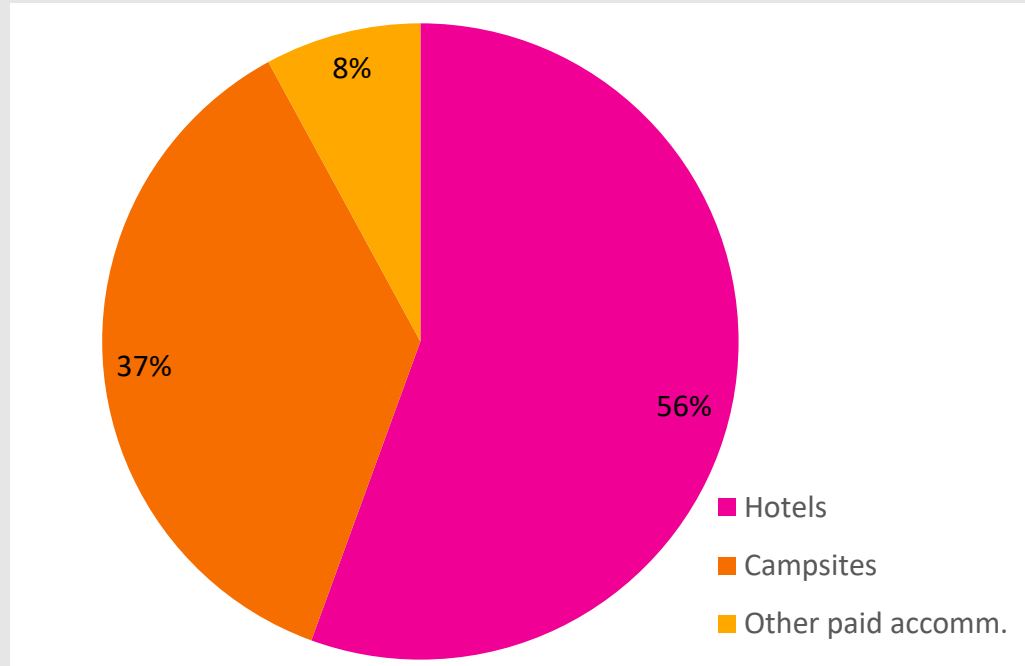


Nights & arrivals in paid accommodation

Type of accommodation, 2024

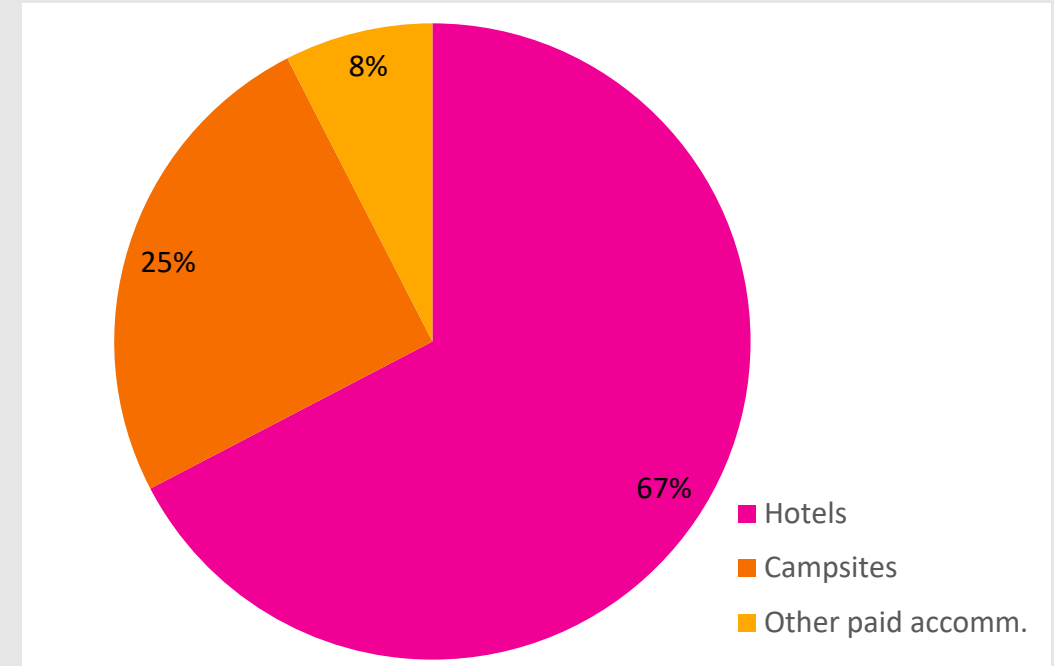


Nights,
paid accommodation, 2024



Hotels	287.776	+4% (vs. 2023)	+5% (vs. 2019)
Campsites	189.026	-9% (vs. 2023)	+77% (vs. 2019)
Other paid accomm.	41.073	+16% (vs. 2023)	+7% (vs. 2019)

Arrivals,
paid accommodation, 2024



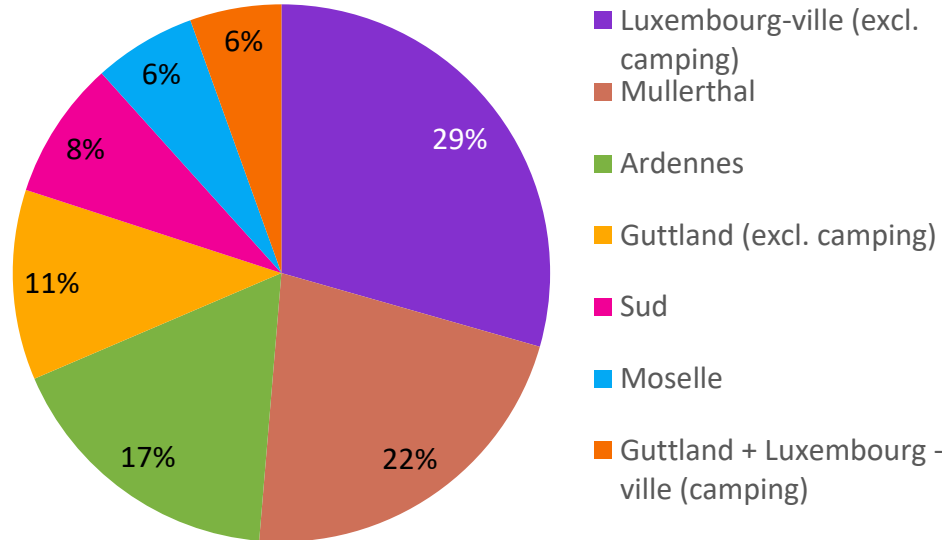
Hotels	160.449	+2% (vs. 2023)	+6% (vs. 2019)
Campsites	59.831	+1% (vs. 2023)	+82% (vs. 2019)
Other paid accomm.	17.955	+17% (vs. 2023)	+8% (vs. 2019)

Nights & arrivals in paid accommodation

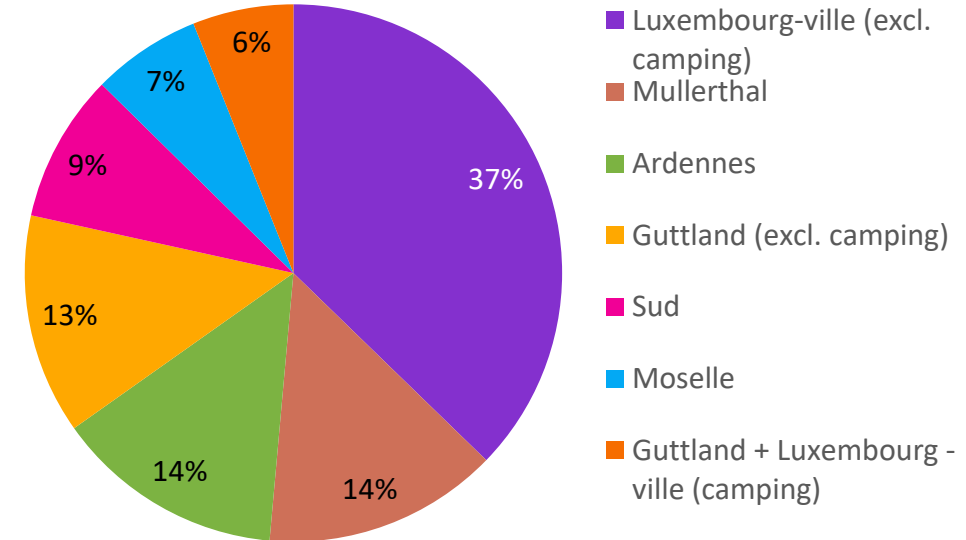
Regions, 2024



Nights, paid accommodation, 2024



Arrivals, paid accommodation, 2024



Lux.-City (excl. camping)	152.376	+6% (vs. 2023)	+2% (vs. 2019)
MPSL	113.408	-12% (vs. 2023)	+53% (vs. 2019)
Eislek	89.302	+3% (vs. 2023)	+42% (vs. 2019)
Guttland (excl. camping)	59.249	+4% (vs. 2023)	+35% (vs. 2019)
South	43.135	-3% (vs. 2023)	+8% (vs. 2019)
Moselle	31.900	+3% (vs. 2023)	+0% (vs. 2019)
Guttland/Lux.-City (camping)	28.505	-5% (vs. 2023)	+82% (vs. 2019)

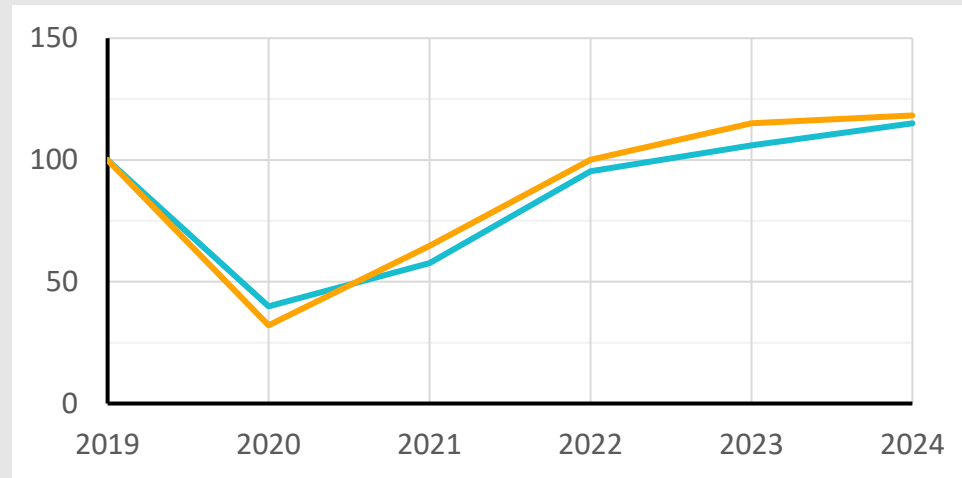
Lux.-City (excl. camping)	88.768	+5% (vs. 2023)	+4% (vs. 2019)
MPSL	33.728	+5% (vs. 2023)	+39% (vs. 2019)
Eislek	32.831	+10% (vs. 2023)	+32% (vs. 2019)
Guttland (excl. camping)	31.569	-1% (vs. 2023)	+31% (vs. 2019)
South	21.253	-6% (vs. 2023)	+6% (vs. 2019)
Moselle	15.628	-1% (vs. 2023)	+4% (vs. 2019)
Guttland/Lux.-City (camping)	14.458	-4% (vs. 2023)	+83% (vs. 2019)

Arrivals in paid accommodation

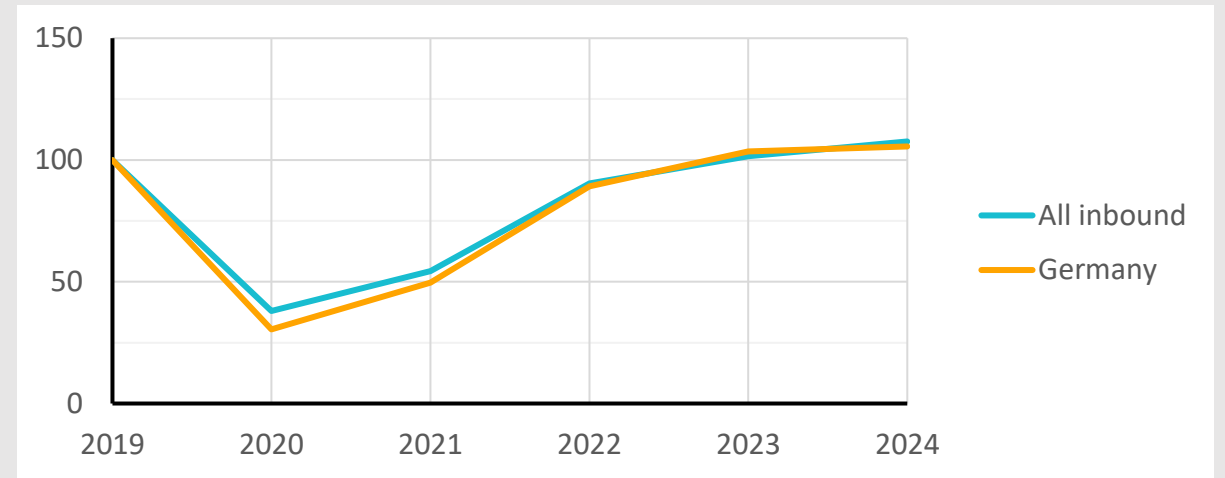
Trends 2019-2024



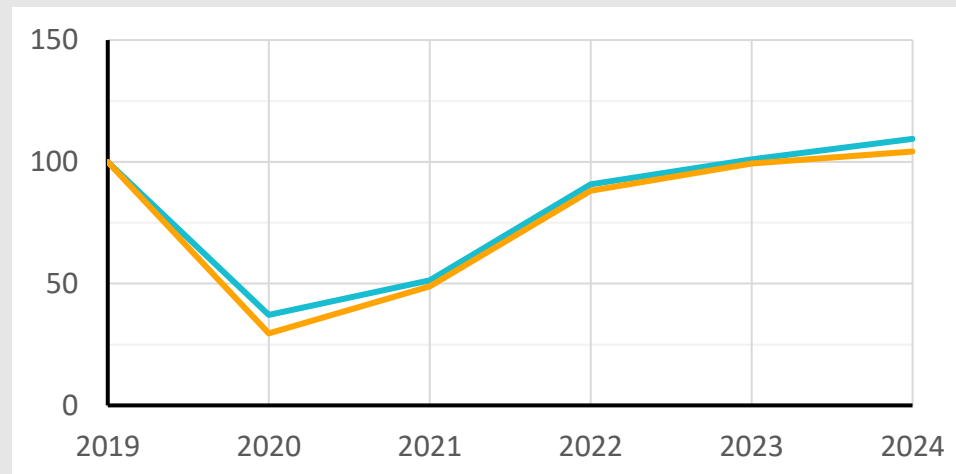
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

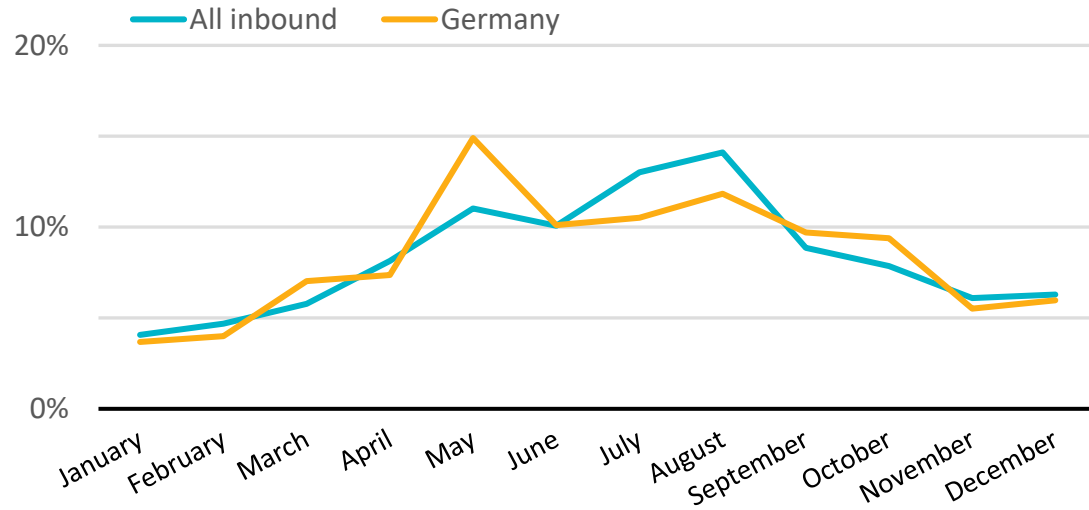


Arrivals in paid accommodation

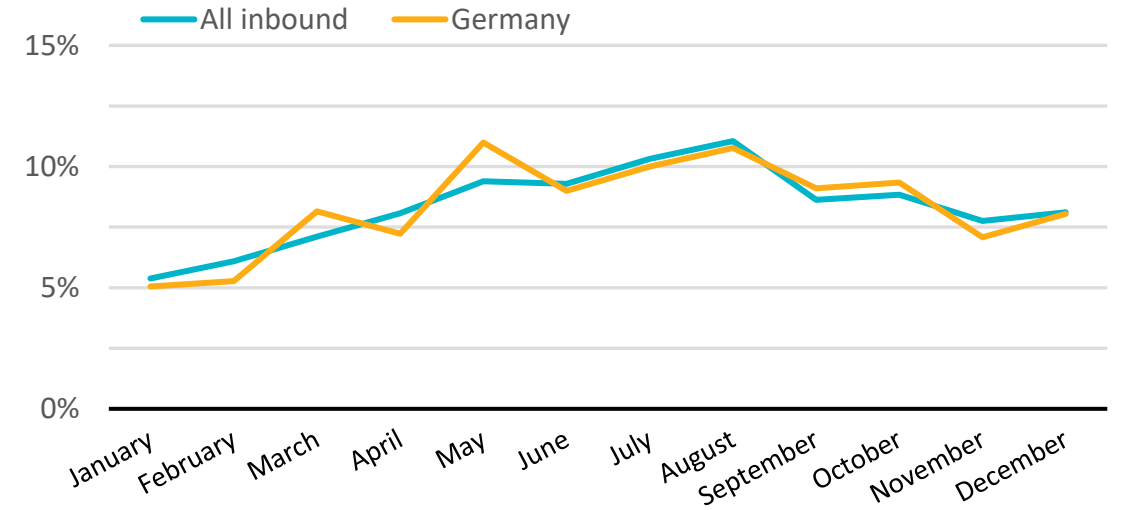
Seasonality



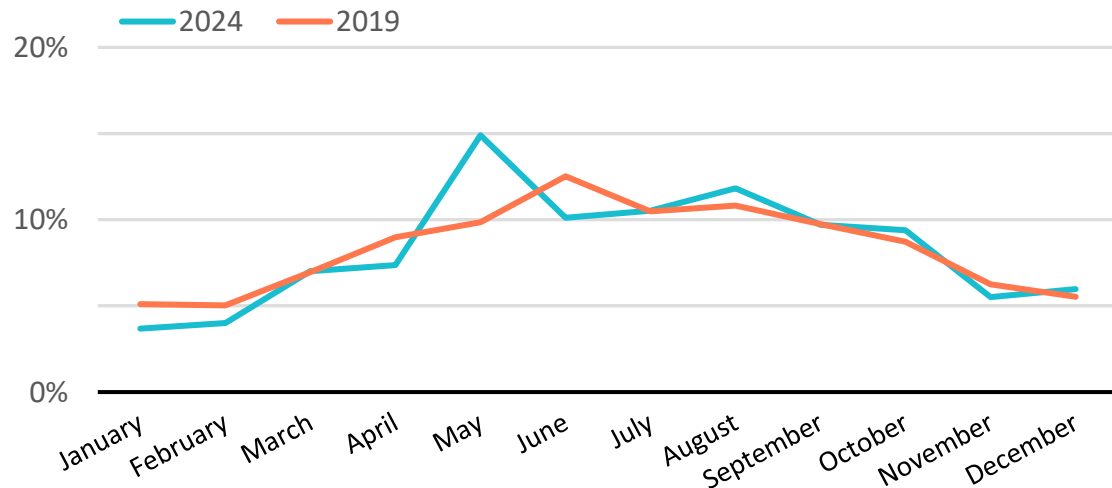
All paid accommodation, 2024



Hotels, 2024



All paid accommodation, arrivals from Germany



Short-term rentals

2024 and 2018-2024



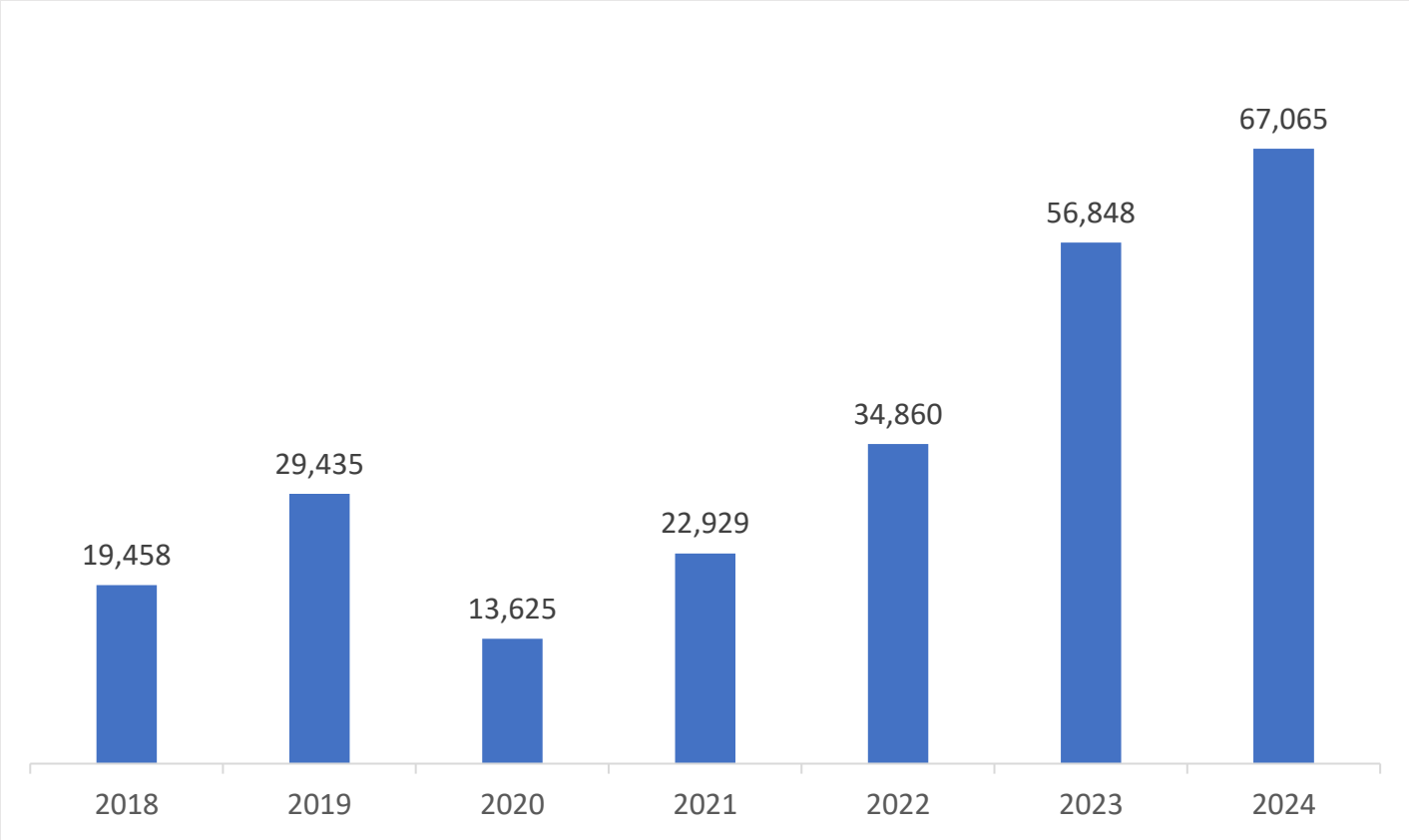
Nights,
Short-term rentals, 2024



18% (vs. 2023)

128% (vs. 2019)

Nights,
Short-term rentals, 2018-2024





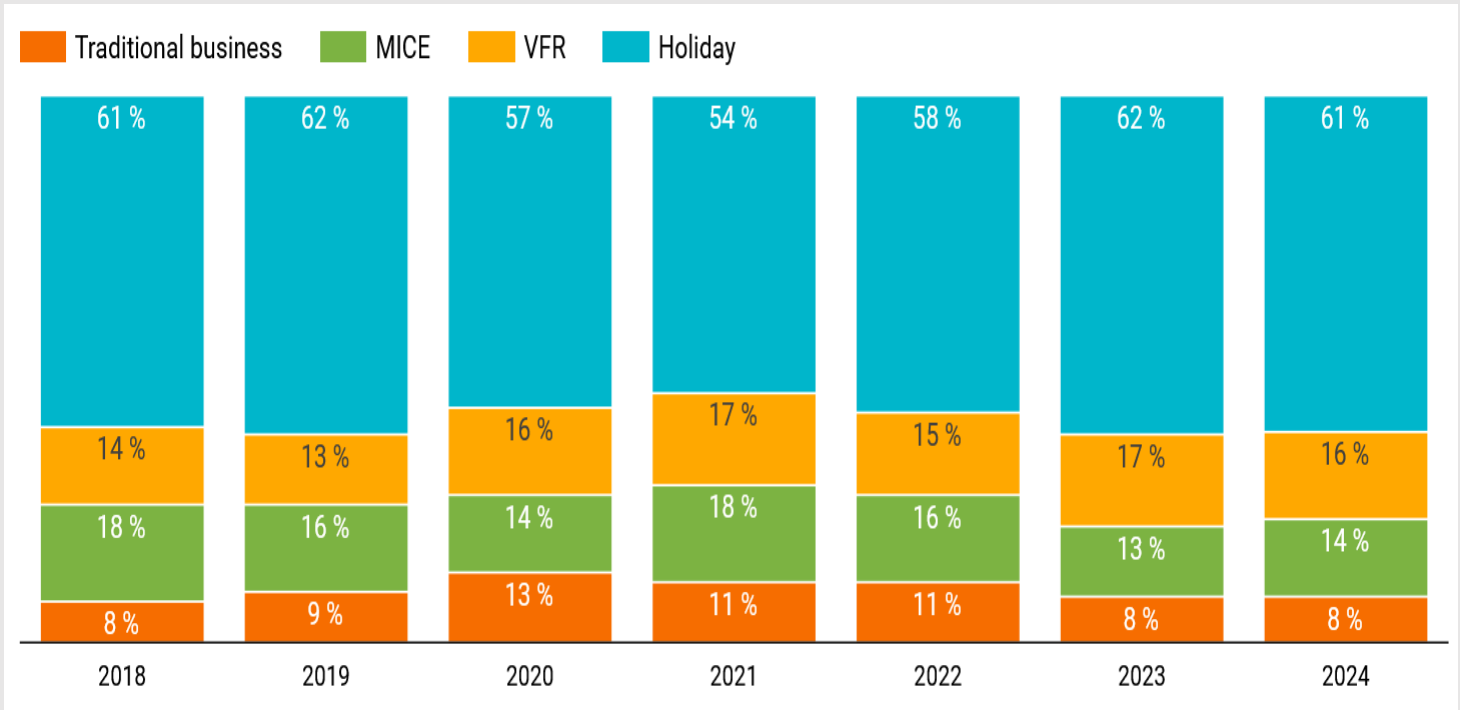
Characteristics of inbound trips

German trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2018-2024

German trips to Luxembourg, 2018-2024



2024

Germany to Luxembourg Europe to Luxembourg

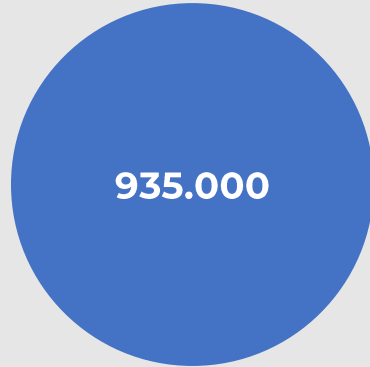
Holiday	61%	61%
VFR	16%	15%
MICE	14%	15%
Traditional Business	8%	8%

Inbound same-day trips to Luxembourg

2024



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



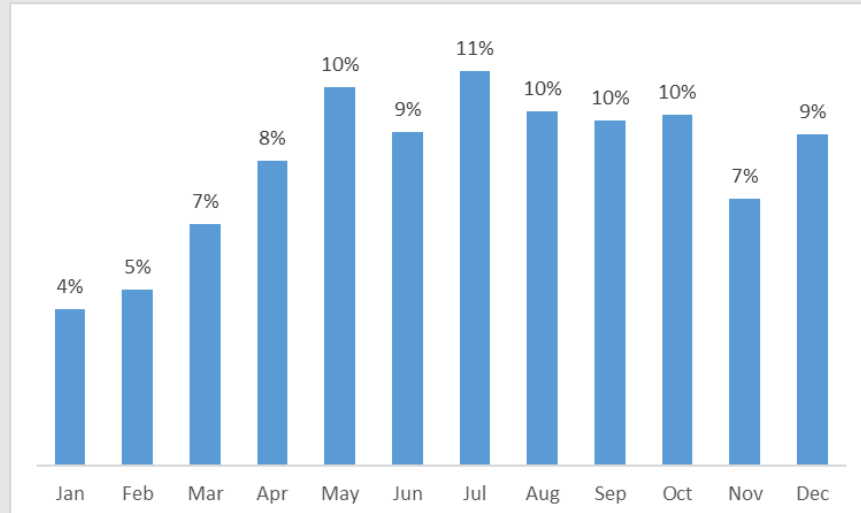
-10% (vs. 2023)

Average length
of same-day trips



-0,2 h (vs. 2023)

Seasonality
% of same-day trips



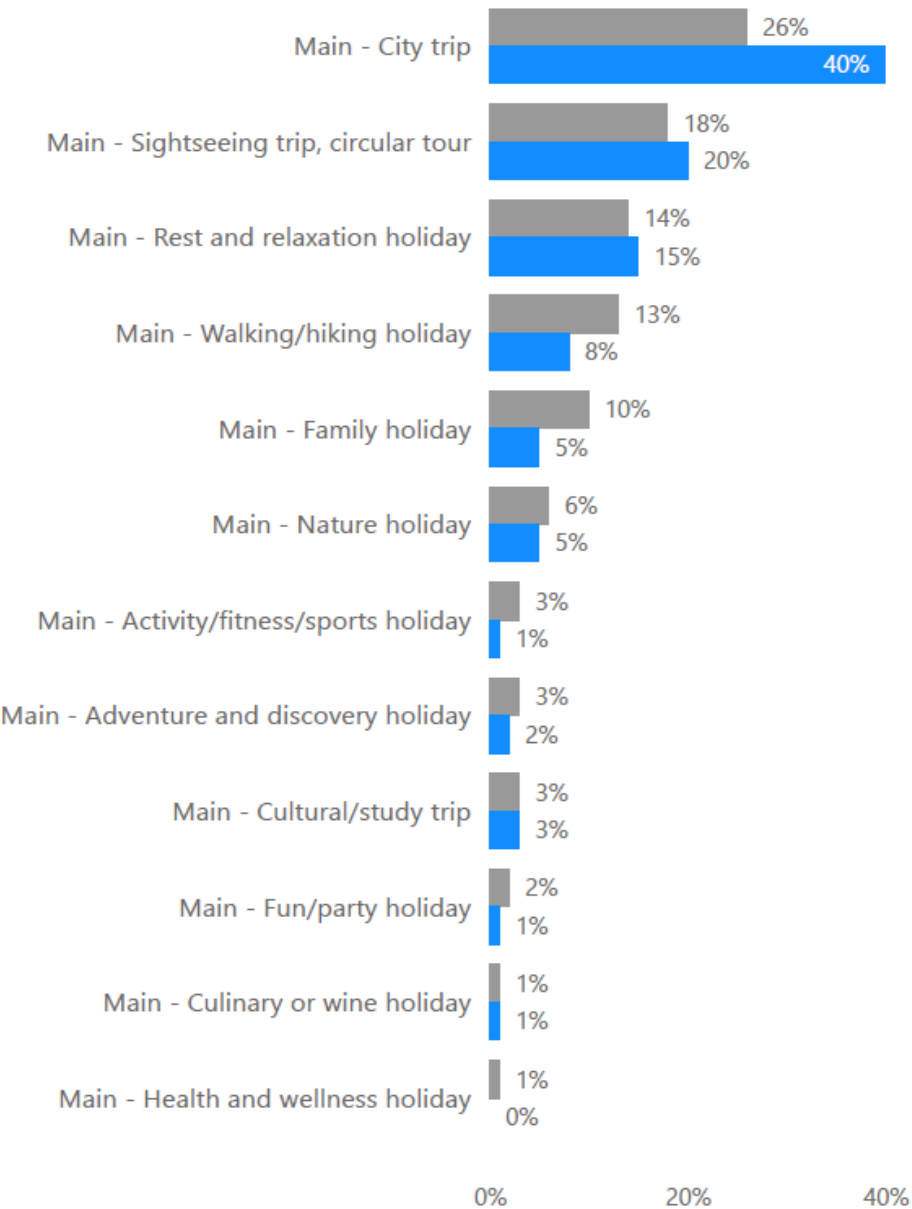


Travel behaviour of inbound leisure visitors

Main holiday types

Visitors with overnight

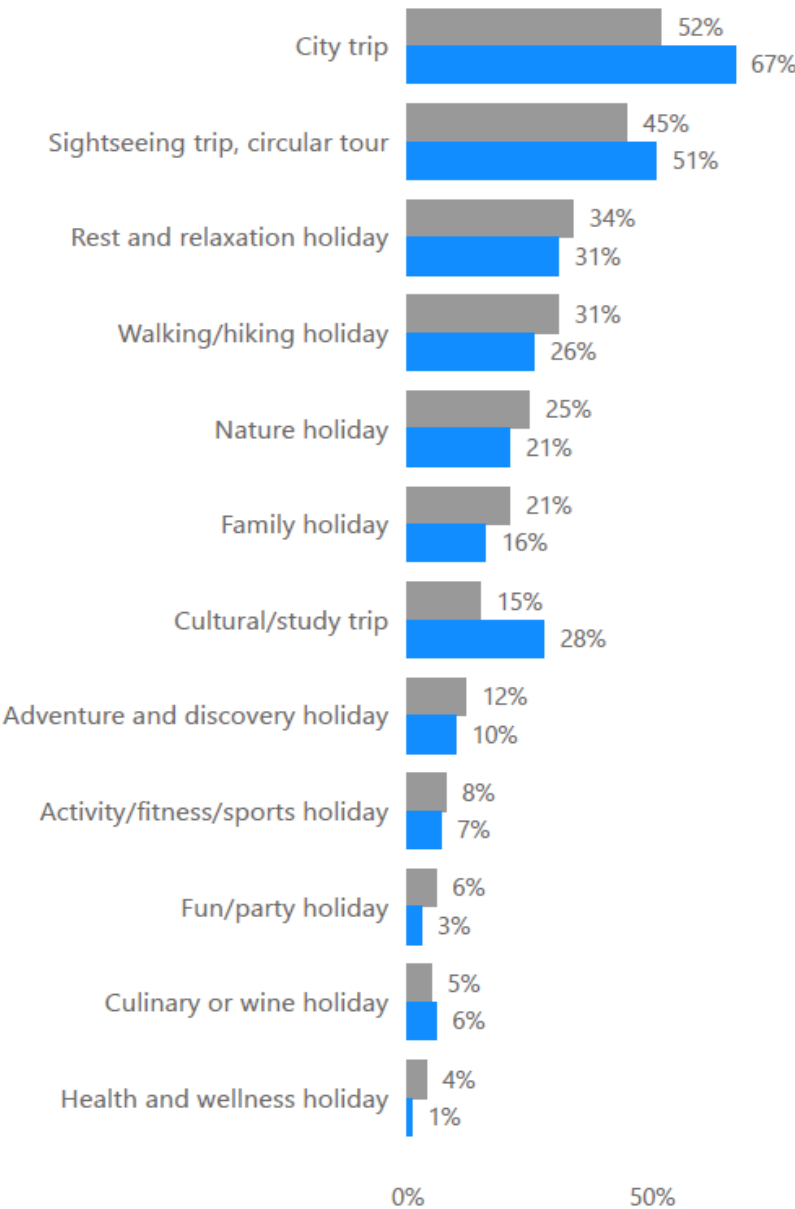
● All Inbound ● Germany



All holiday types

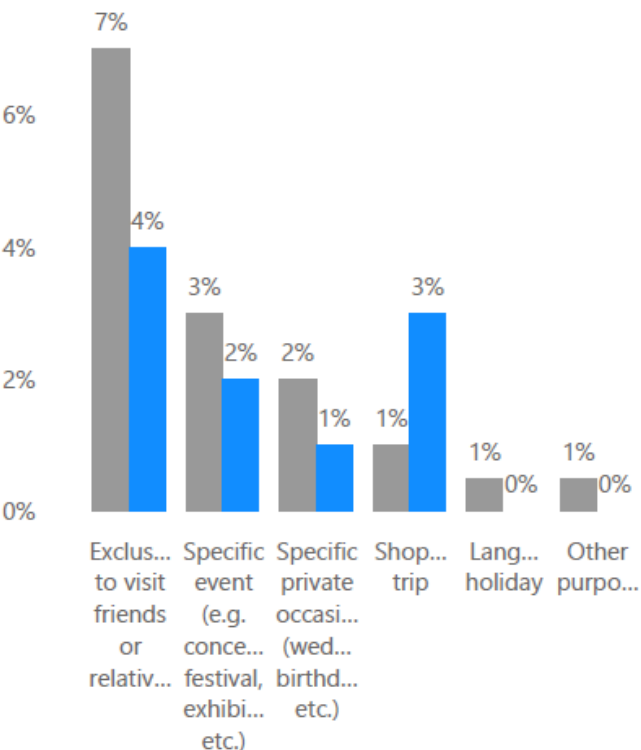
Visitors with overnight

● All Inbound ● Germany



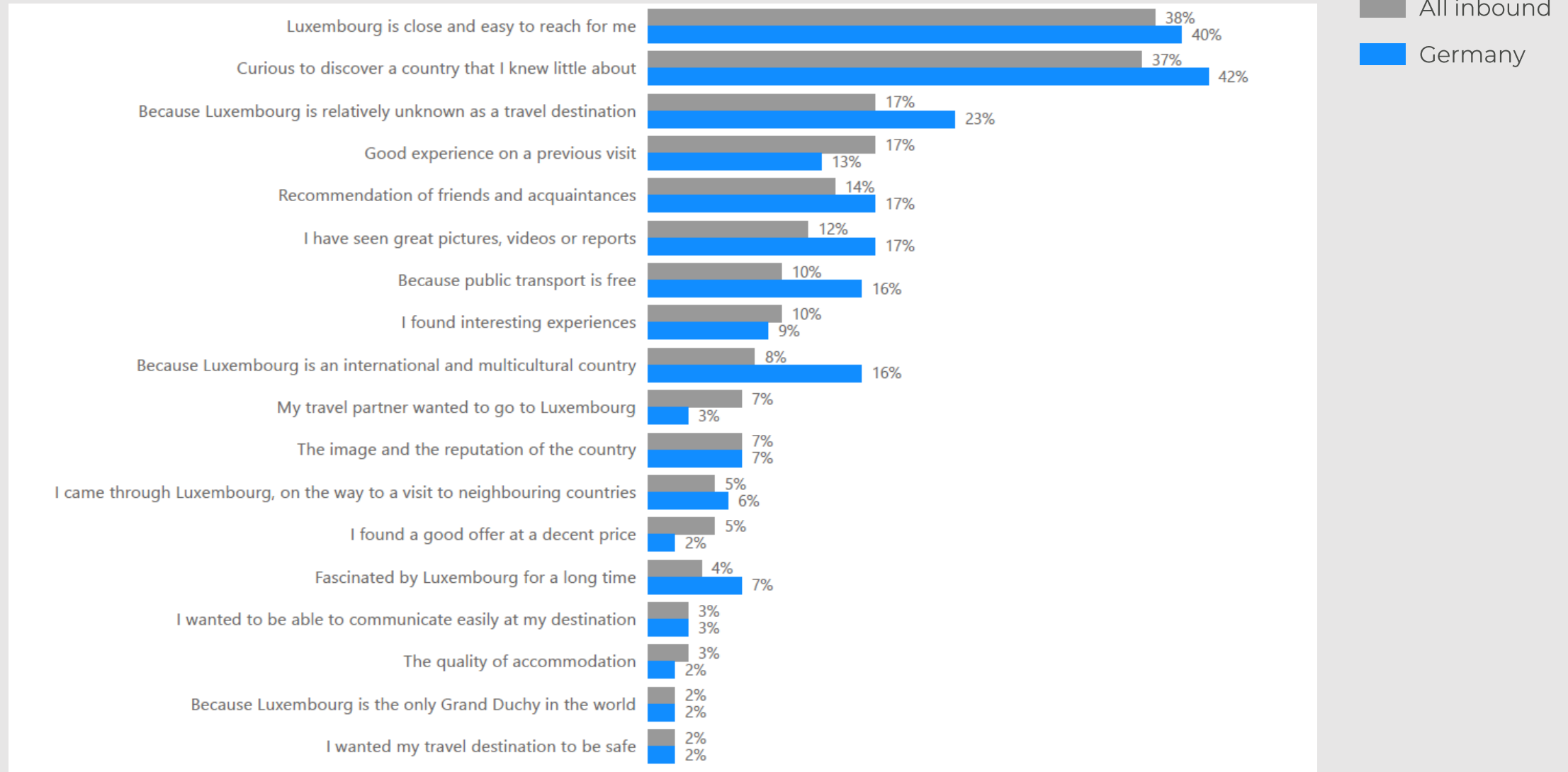
Main purpose of overnight trip (if not holiday)

● All Inbound ● Germany



Key decision criteria for choosing Luxembourg

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

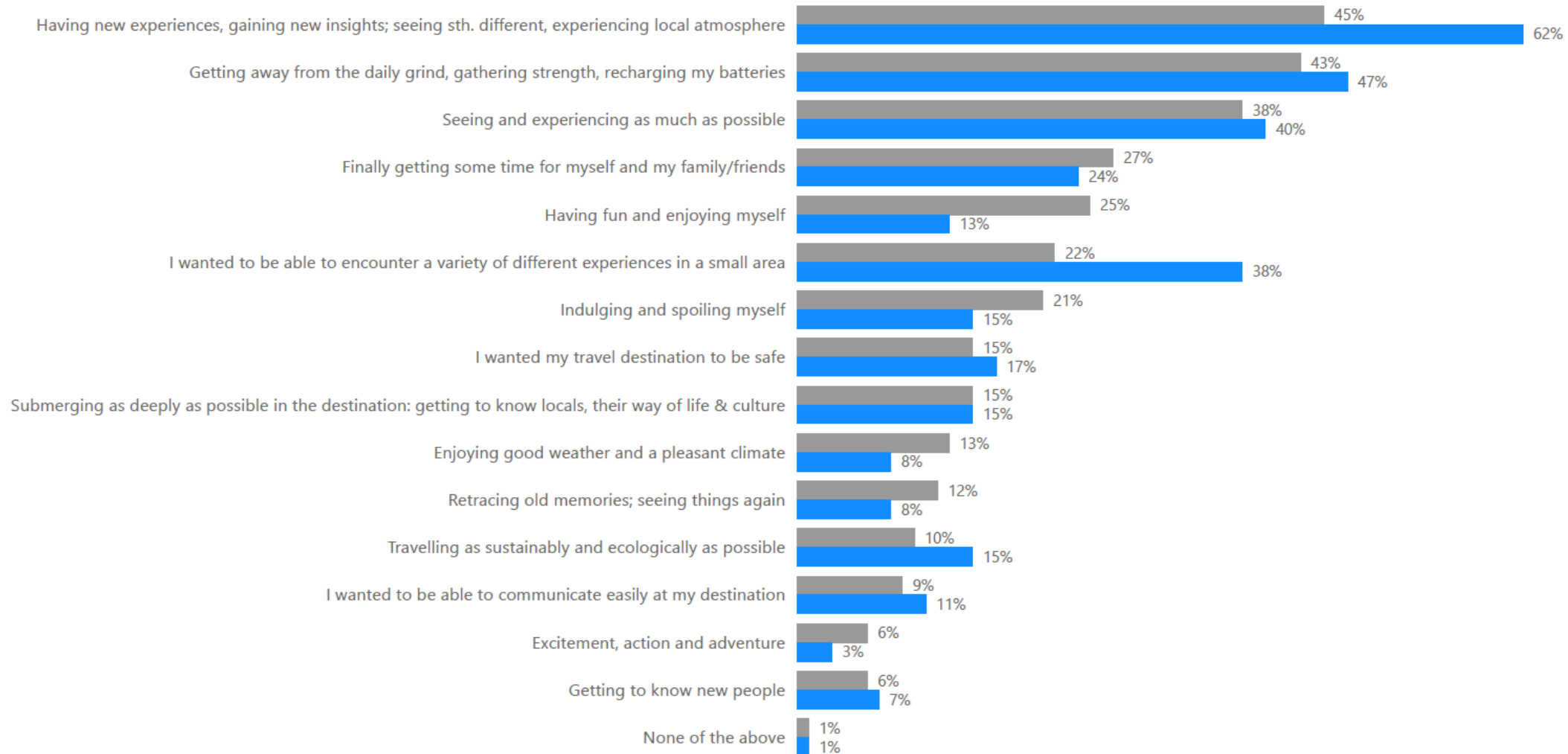


Key travel motives

Inbound leisure visitors with overnight, 2023-2024

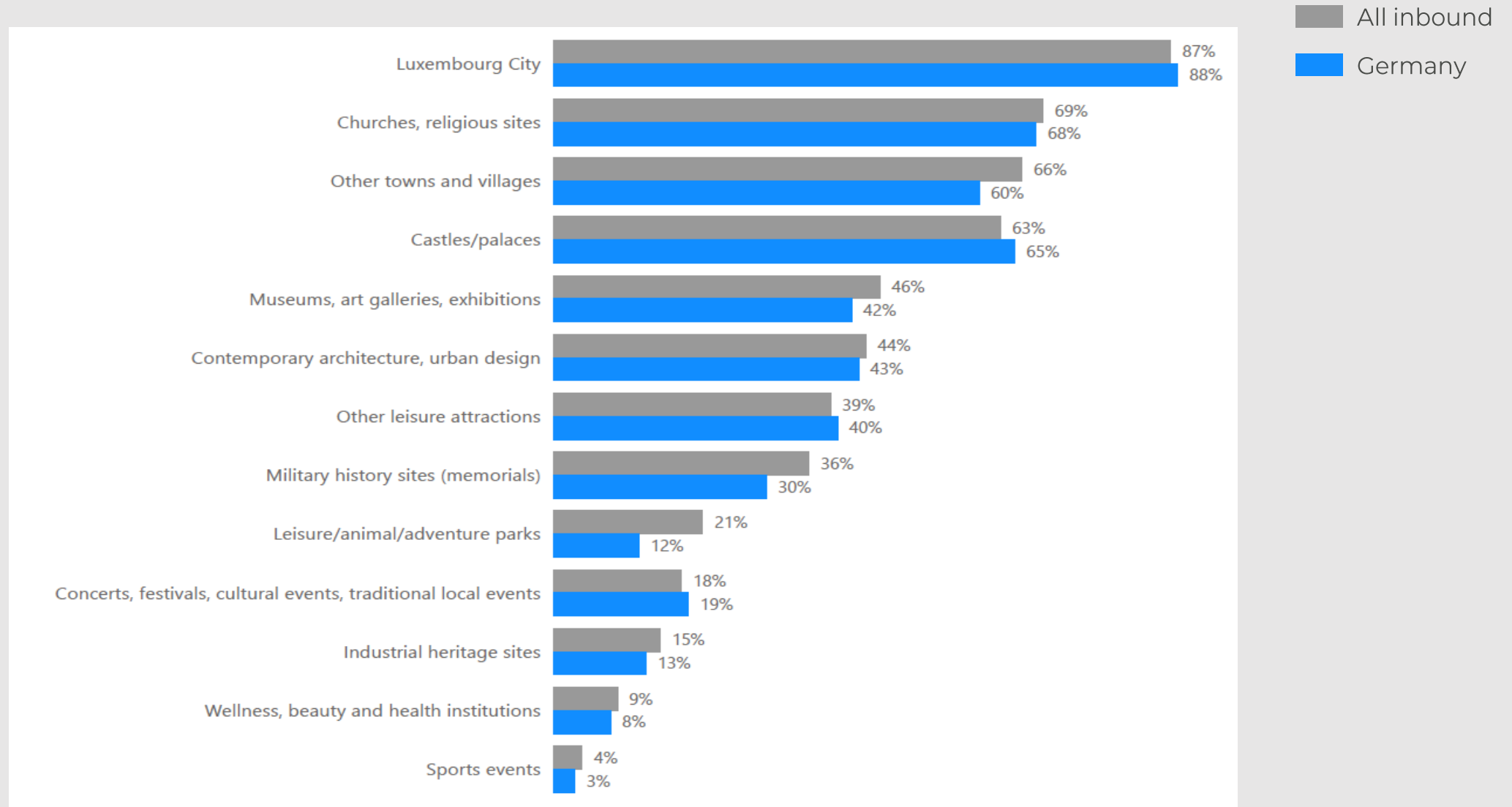


■ All inbound
■ Germany



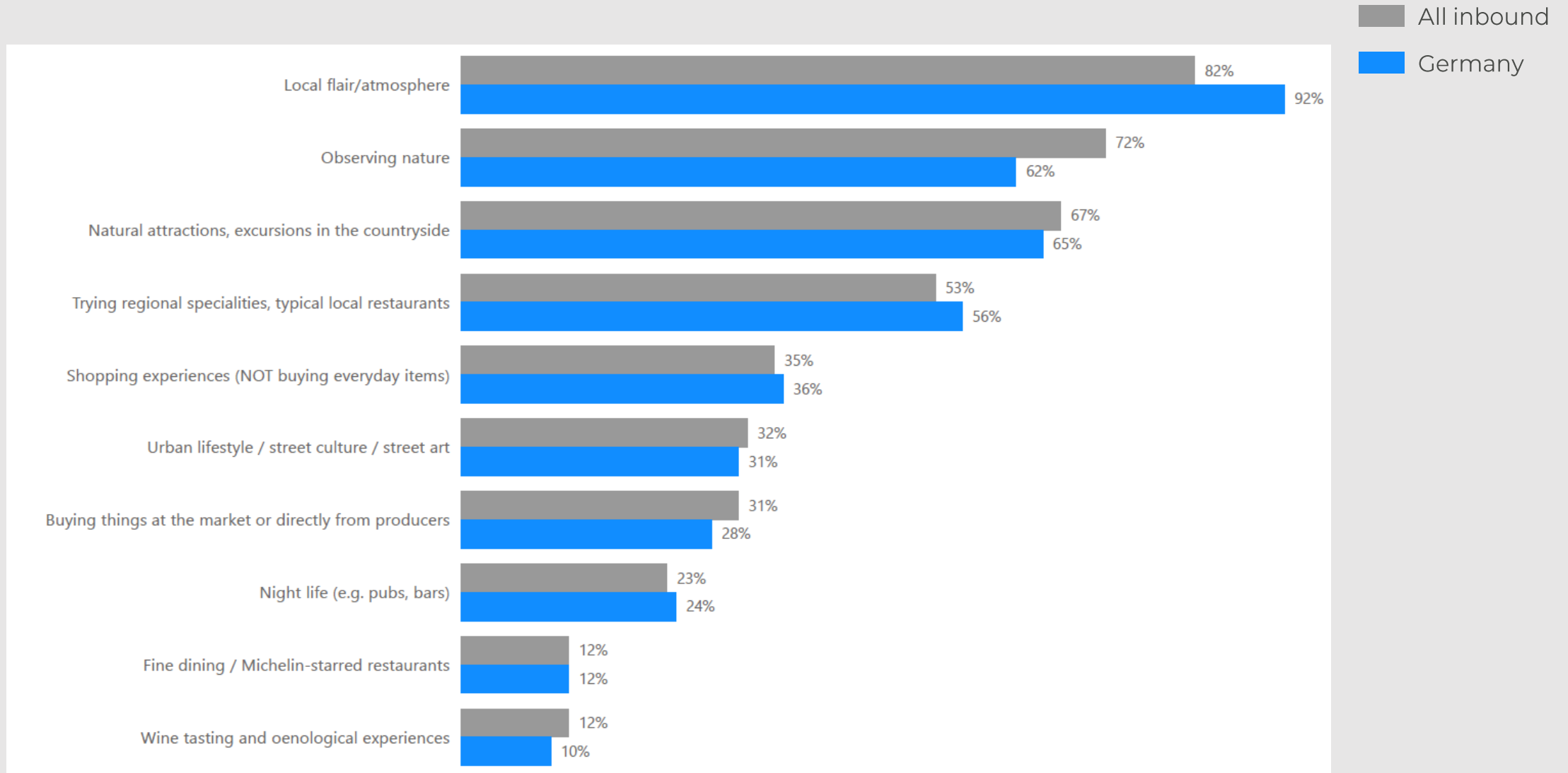
Type of places visited in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



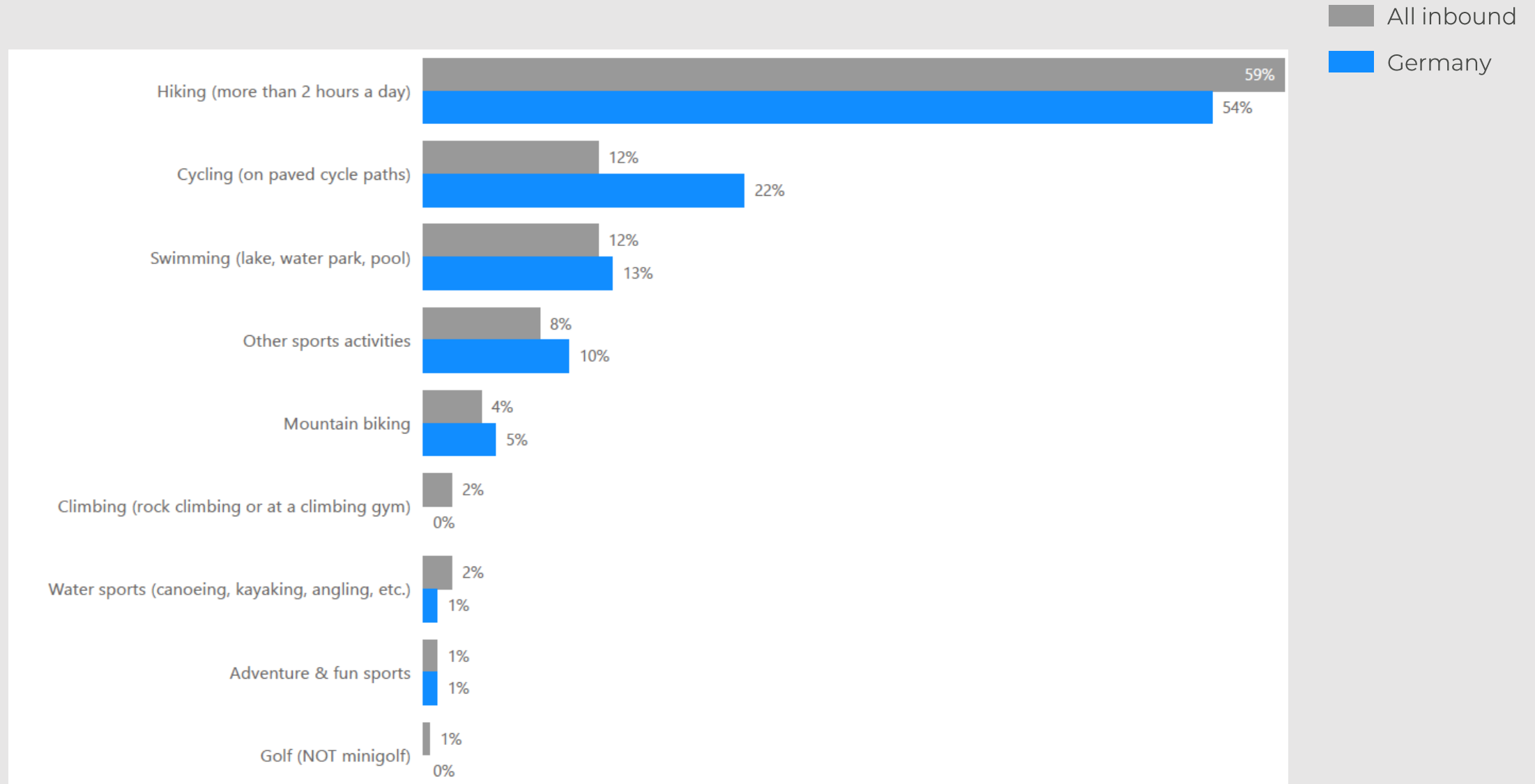
Non-sporting activities undertaken in Luxembourg

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

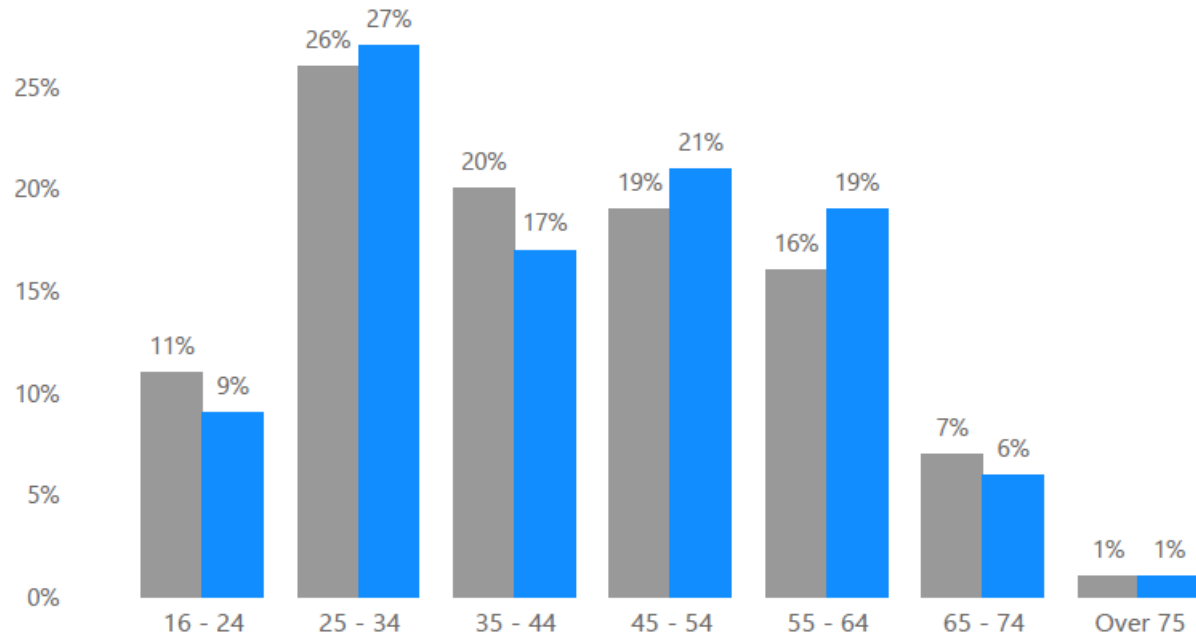


All inbound

Germany

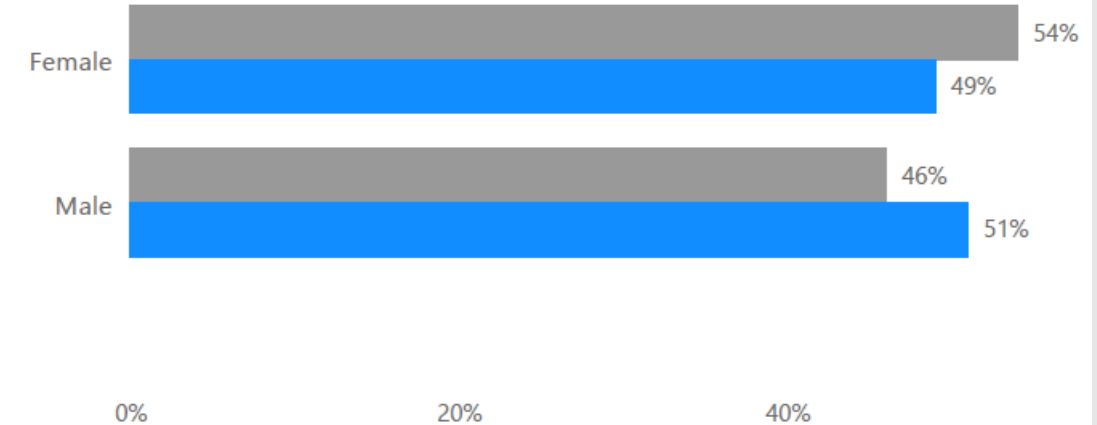
Age

Visitors with overnight



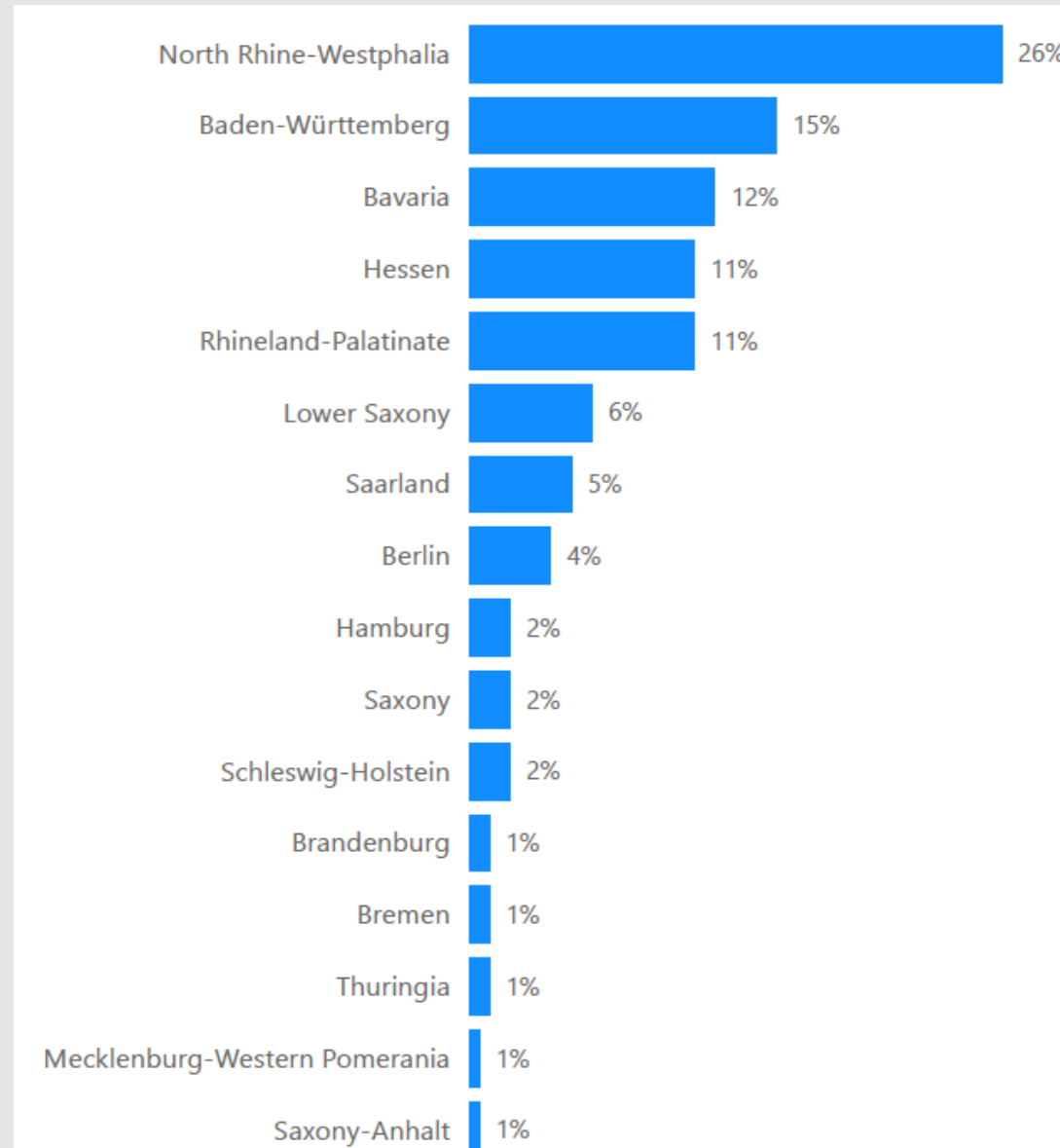
Gender

Visitors with overnight



Region of origin

Inbound leisure visitors with overnight, 2023-2024

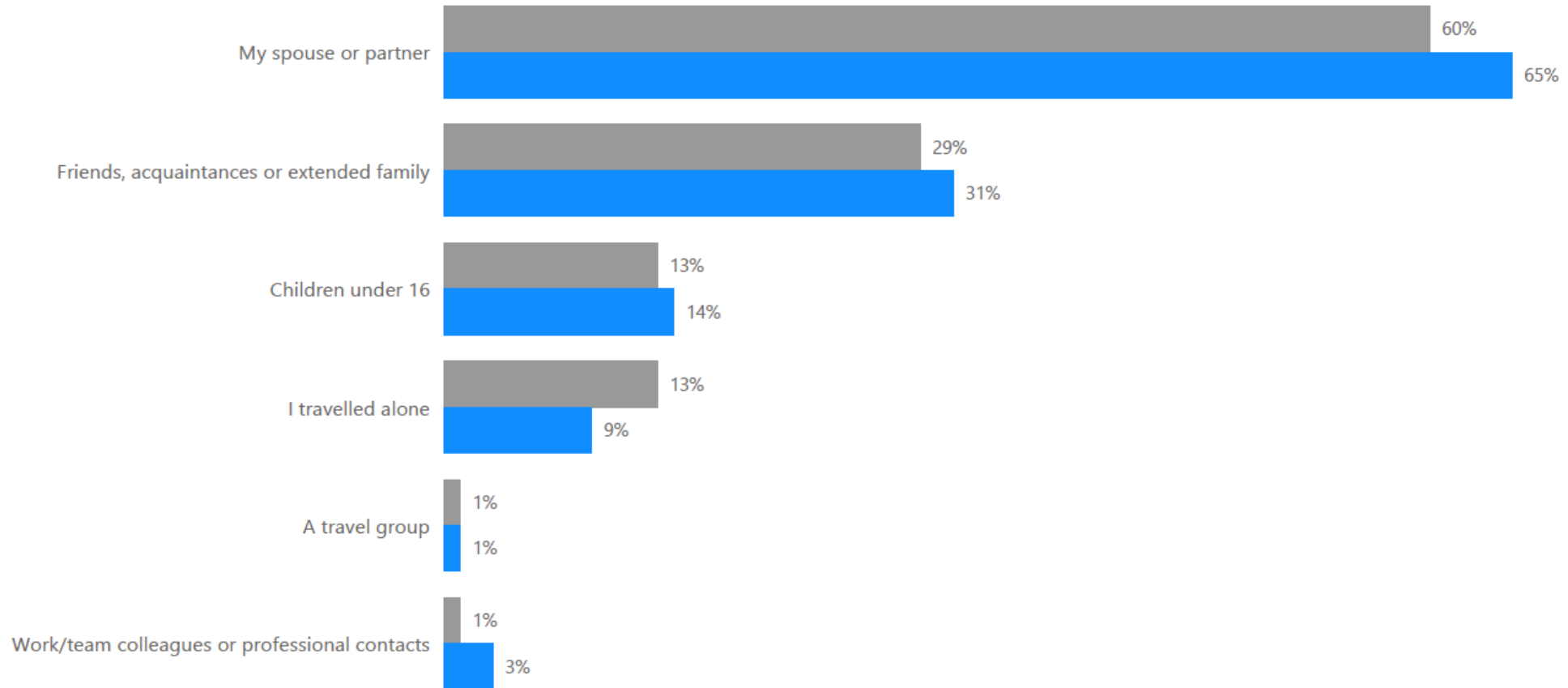


Travel party

Inbound leisure visitors with overnight, 2023-2024



■ All inbound
■ Germany



Transport, new visitors and cross-border trips

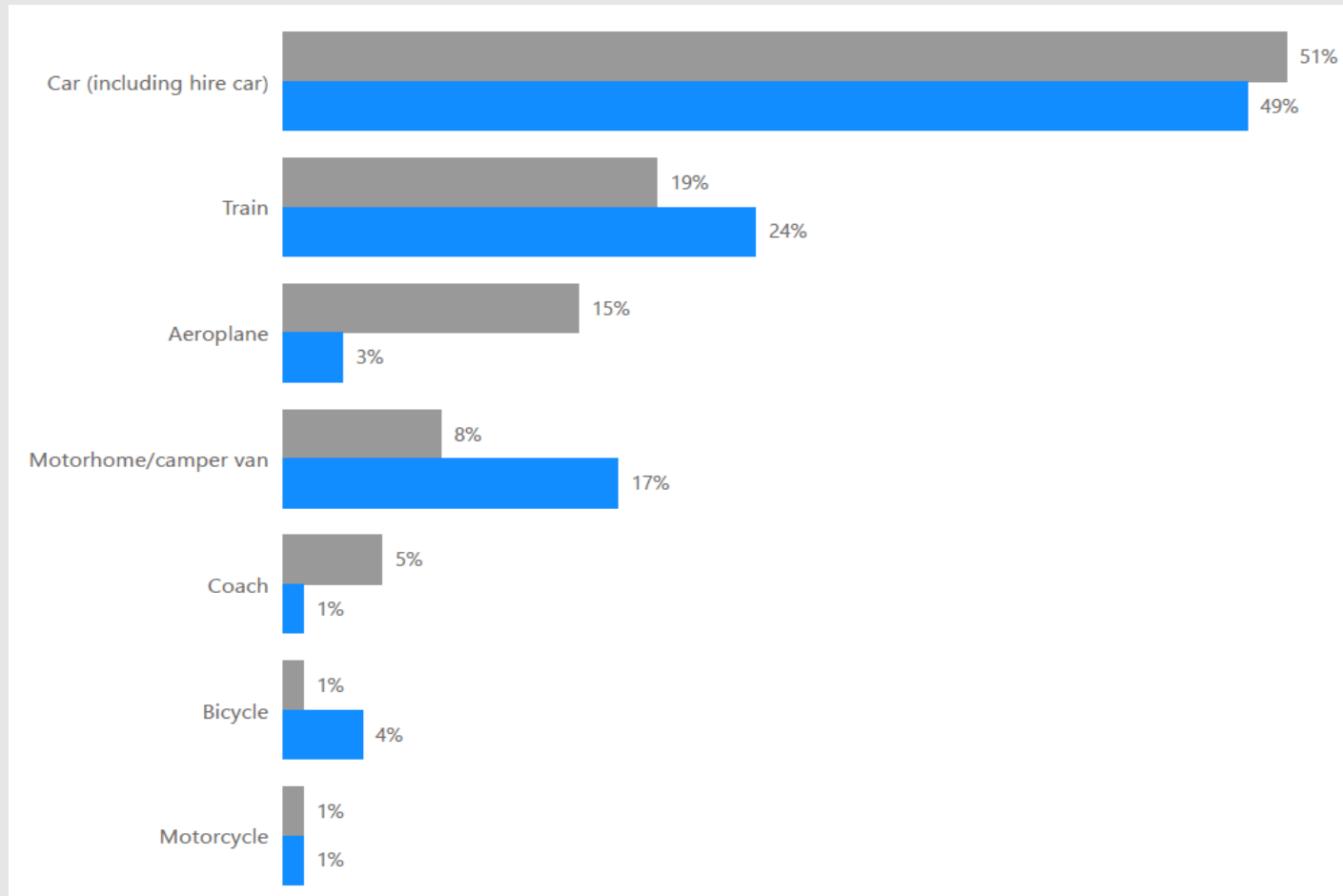
Inbound leisure visitors with overnight, 2023-2024



Mode of transport to access Luxembourg

■ All inbound

■ Germany



First-time visitors

Visitors with overnight

63%

All Inbound

65%

Germany

Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

39%

All Inbound

36%

Germany

Expenditure

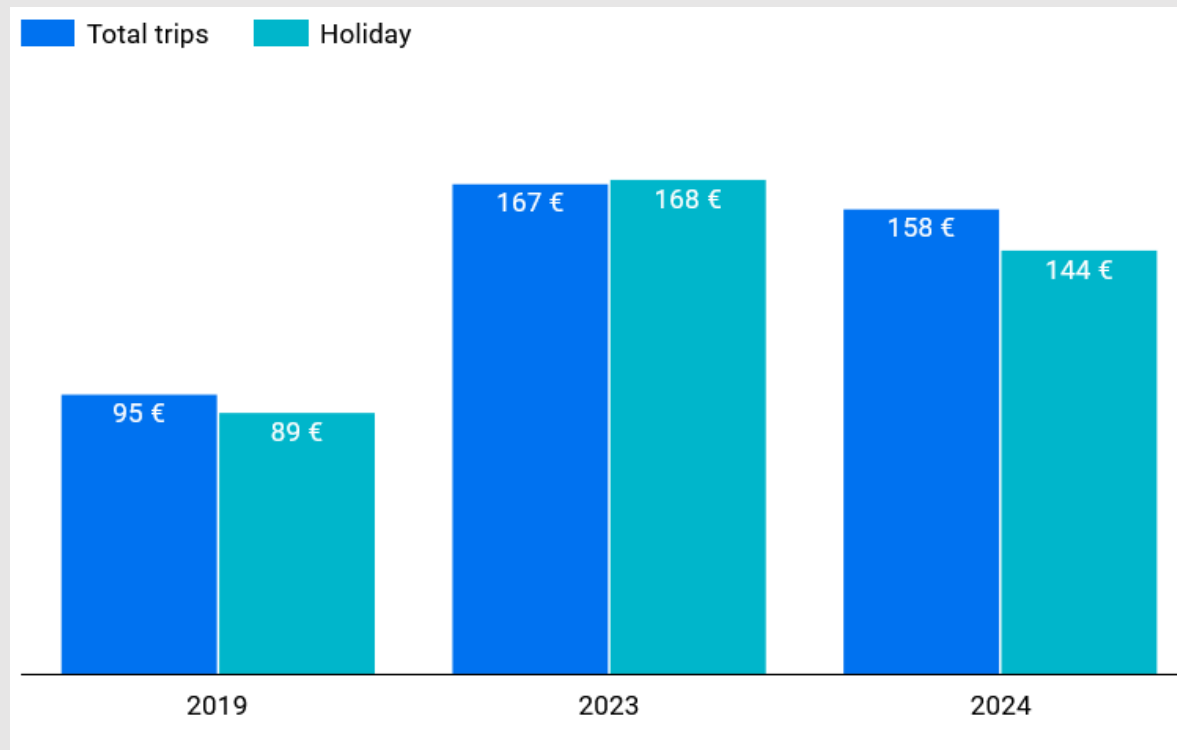
Inbound trips to Luxembourg with overnight (all accommodation)



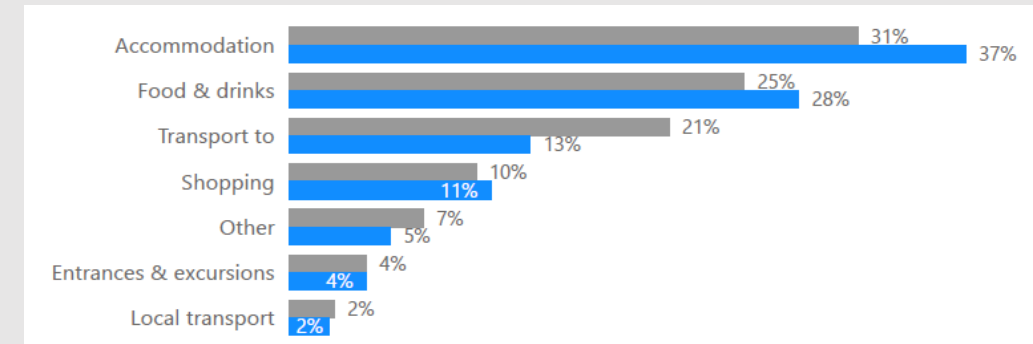
■ All inbound

■ Germany

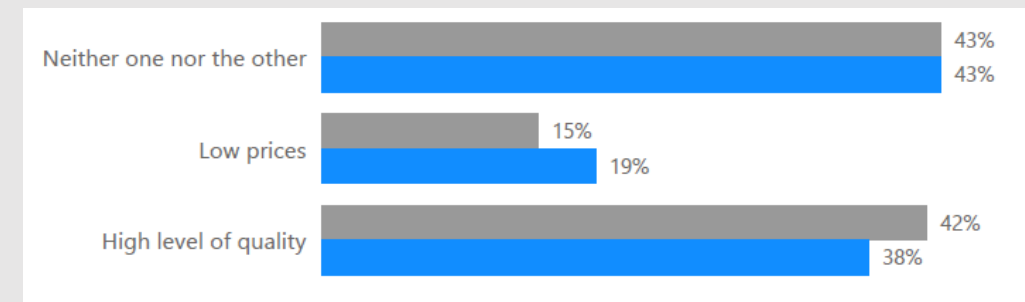
Average expenditure/pers./day



Expenditure of leisure inbound visitors by categories, 2023-2024



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

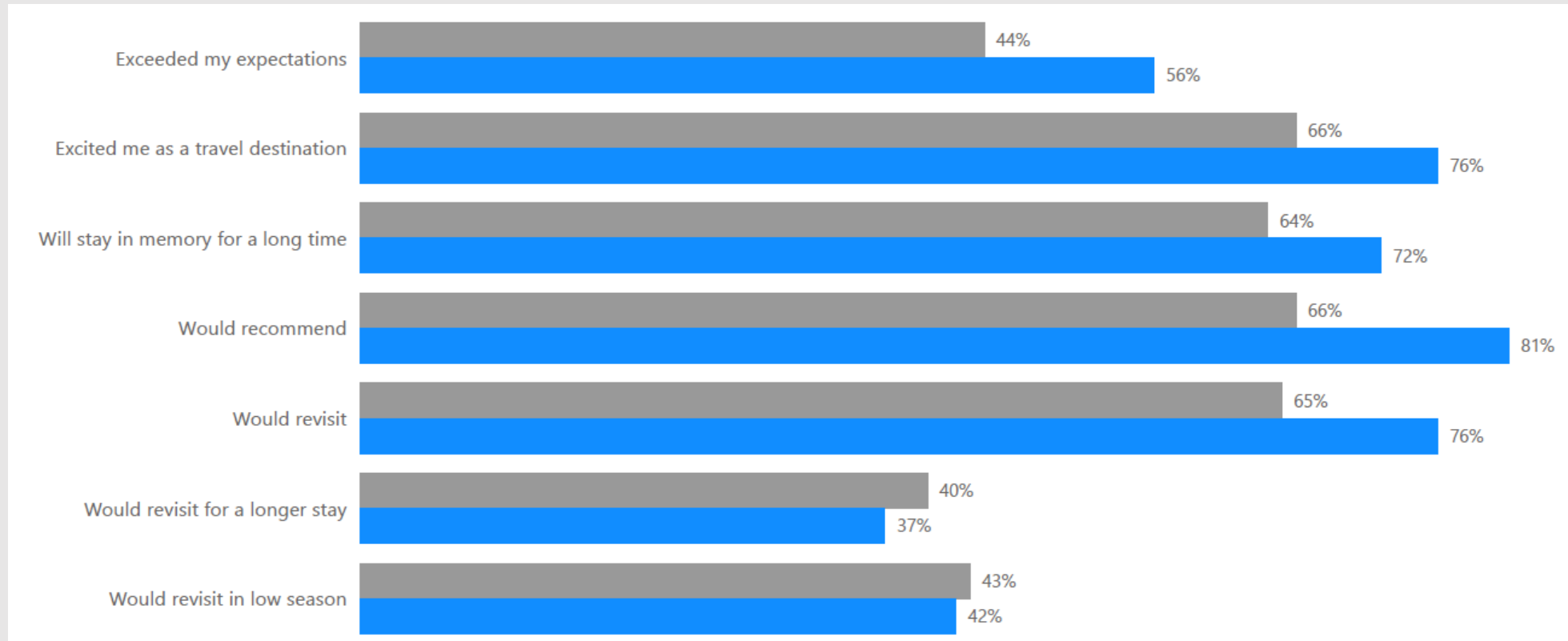


Visitor satisfaction and recommendation

Inbound leisure visitors, 2023-2024

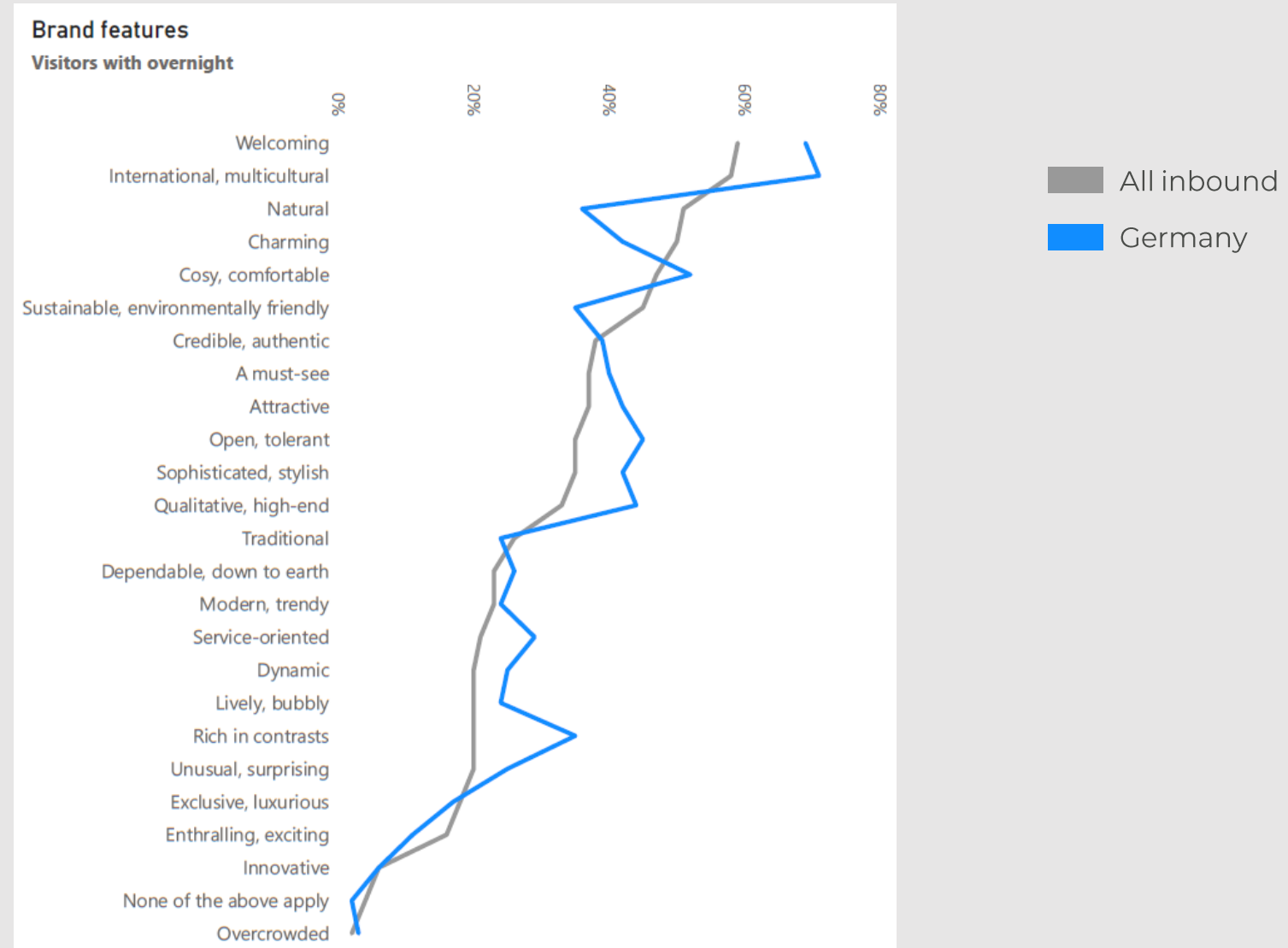


■ All inbound
■ Germany



Brand features perception

Inbound leisure visitors with overnights, 2023-2024



LFT Target Segments



Germany
All inbound

Explorers



Nature-Loving Actives



Relaxation Seekers



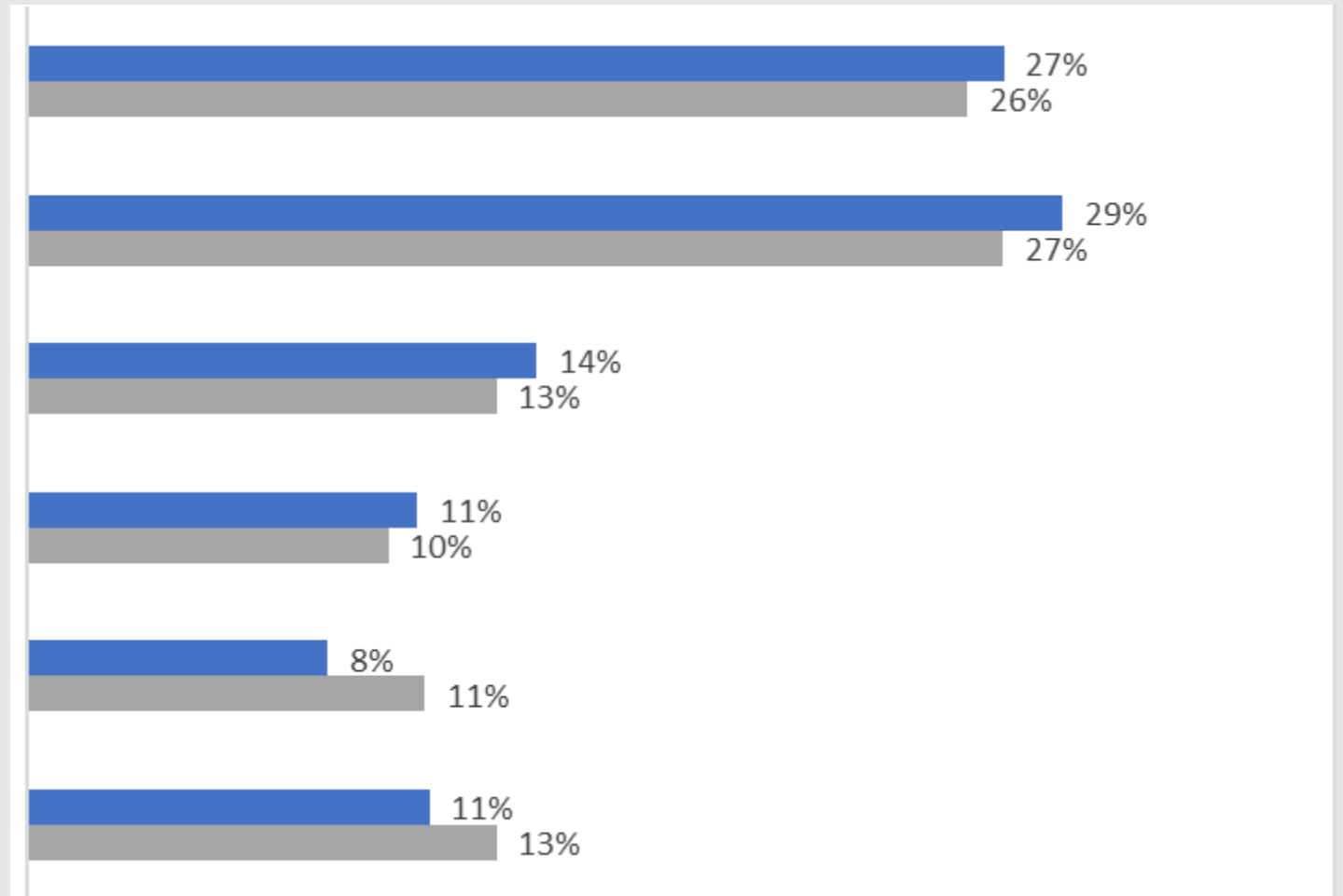
Short Breakers



Perfection Seekers



Leisure Oriented

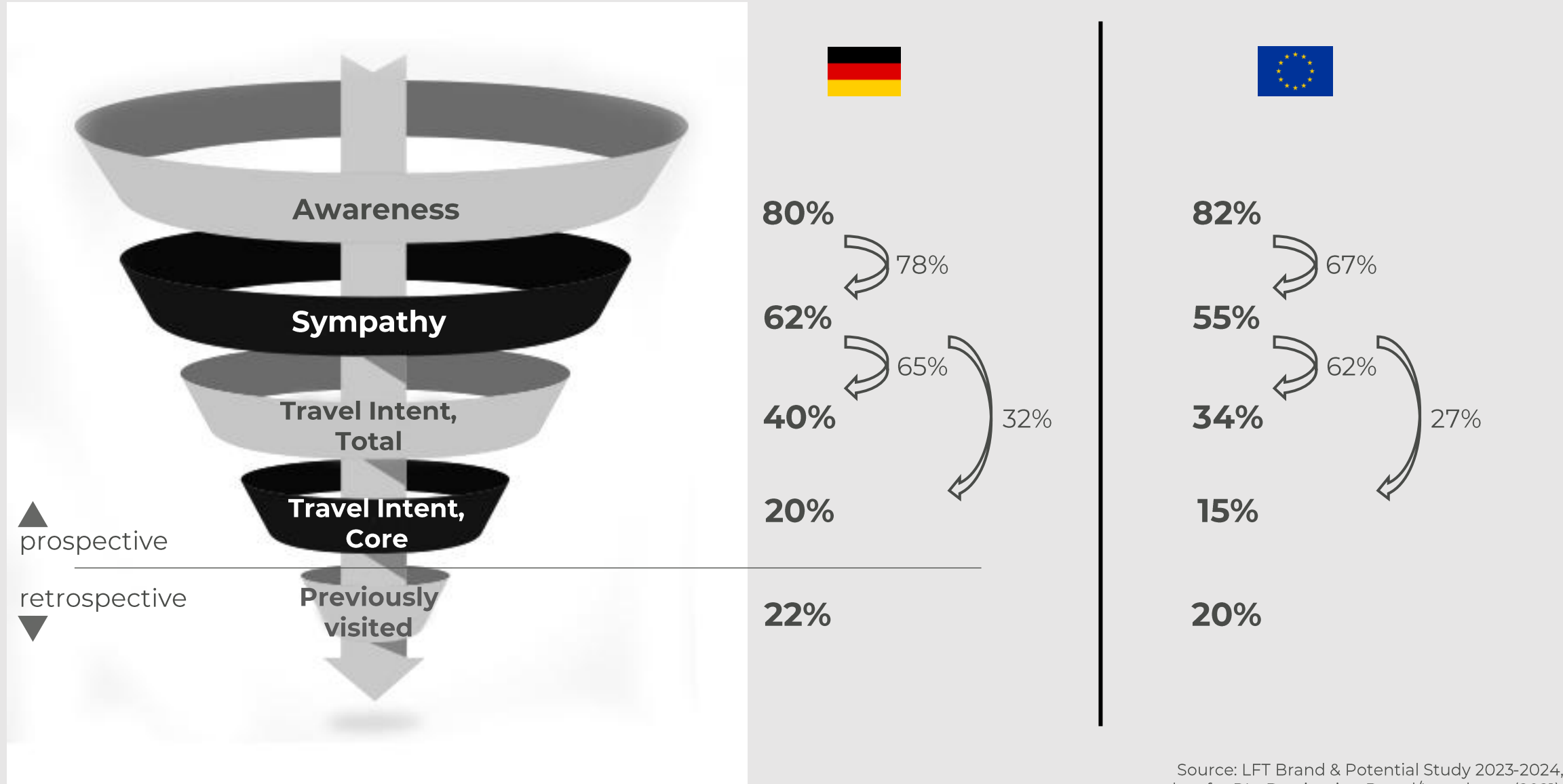




Target segments, Brand & Growth Potential

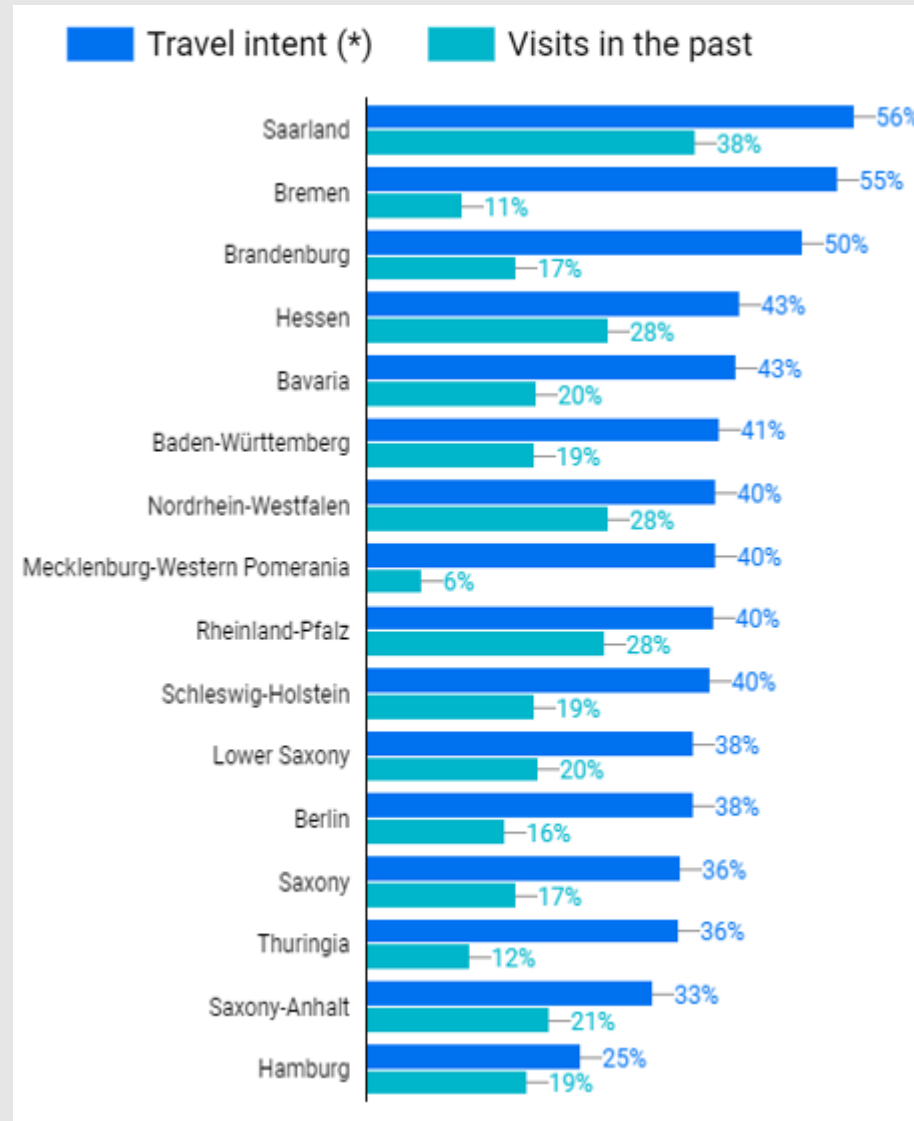
Destination Luxembourg - Brand Funnel 2024

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	72%
Resting/Relaxation	1	2	71%
Nature	3	3	70%
Immersive travel	6	4	69%
Sightseeing	4	5	68%
Architecture/townscapes	7	6	66%
City	5	7	64%
Fun/entertainment	8	8	61%
Culture	11	9	60%
Castles	9	10	59%
Family	12	11	59%
Exchanging with locals	13	12	58%
History/Unesco	10	13	58%
Learning/new skills	14	14	56%
Events	16	15	55%
Sustainability	15	16	53%
Nightlife (**)	20	17	50%
Hiking	17	18	49%
Adventure/action	19	19	48%
Active-sports	27	20	47%
Wine	21	21	47%
Shopping	23	22	46%
Wellness	25	23	46%
Travelling by train	18	24	45%
Countryside	22	25	45%
Cycling	31	26	44%
Remembrance	26	27	44%
Industrial heritage	28	28	43%
Luxury	24	29	41%
Camping	29	30	39%
Film locations	30	31	37%
MTB	32	32	29%
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	1	42%
Culinary	3	2	41%
Architecture/townscapes	4	3	33%
Nature	5	4	32%
Resting/Relaxation	2	5	31%
Castles	7	6	29%
Shopping	10	7	29%
Culture	6	8	29%
Luxury	9	9	28%
Family	8	10	28%
History/Unesco	12	11	24%
Wine	15	12	23%
Fun/entertainment	13	13	22%
Hiking	11	14	21%
Cycling	20	15	20%
Active-sports	21	16	19%
Nightlife (***)	14	17	19%
Sustainability	18	18	18%
Wellness	16	19	17%
Countryside	17	20	17%
Camping	19	21	17%
Events	23	22	17%
Remembrance	26	23	15%
Adventure/action	22	24	14%
Industrial heritage	24	25	14%
MTB	25	26	13%

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

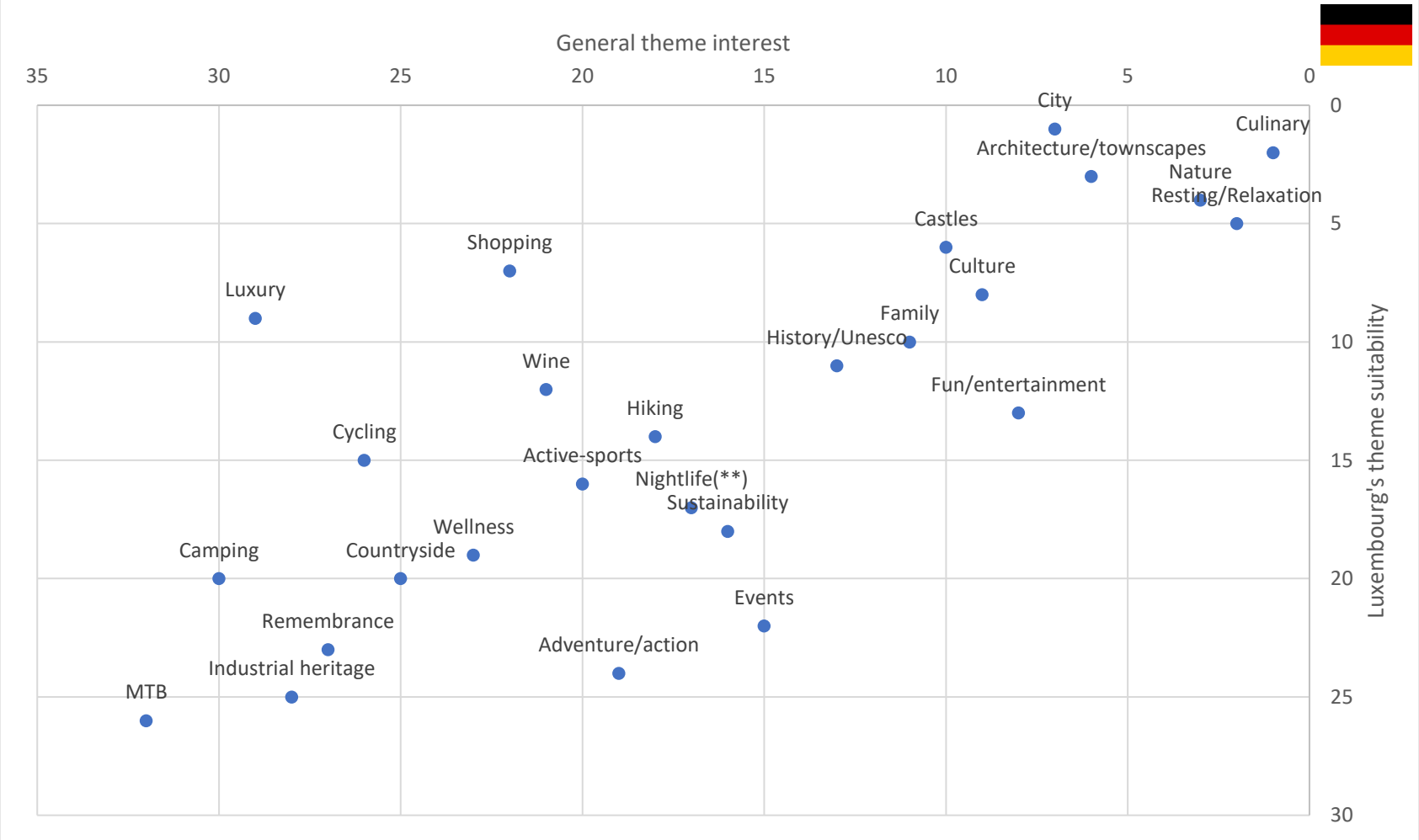
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

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

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
safe	1	1	44%
clean	2	2	38%
welcoming, hospitable	4	3	37%
open-minded, tolerant, international	6	4	37%
of high quality	3	5	36%
authentic, real	5	6	31%
dynamic, modern	9	7	28%
exclusive, luxurious	8	8	27%
attractive, appealing	7	9	27%
service oriented	10	10	25%
varied, diversified	12	11	25%
surprising	11	12	20%
lively, trendy	13	13	20%
not overcrowded / insider tip	14	14	19%
sustainable	15	15	16%
affordable	16	16	14%

(*) 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



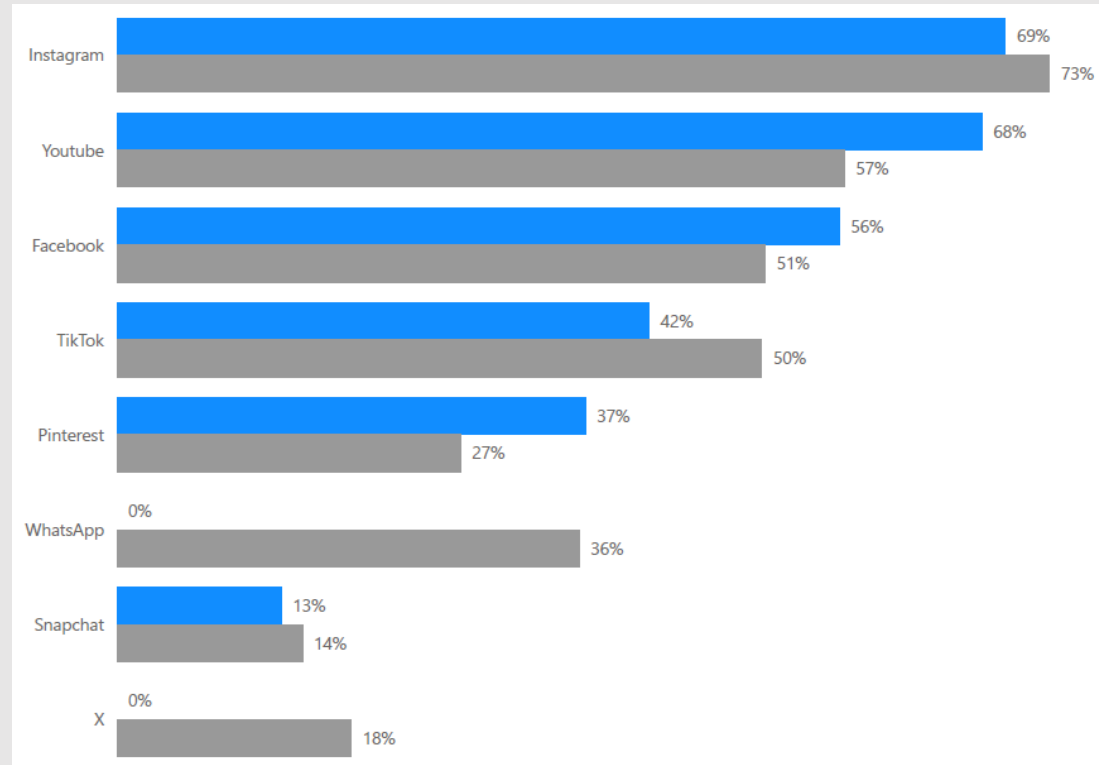
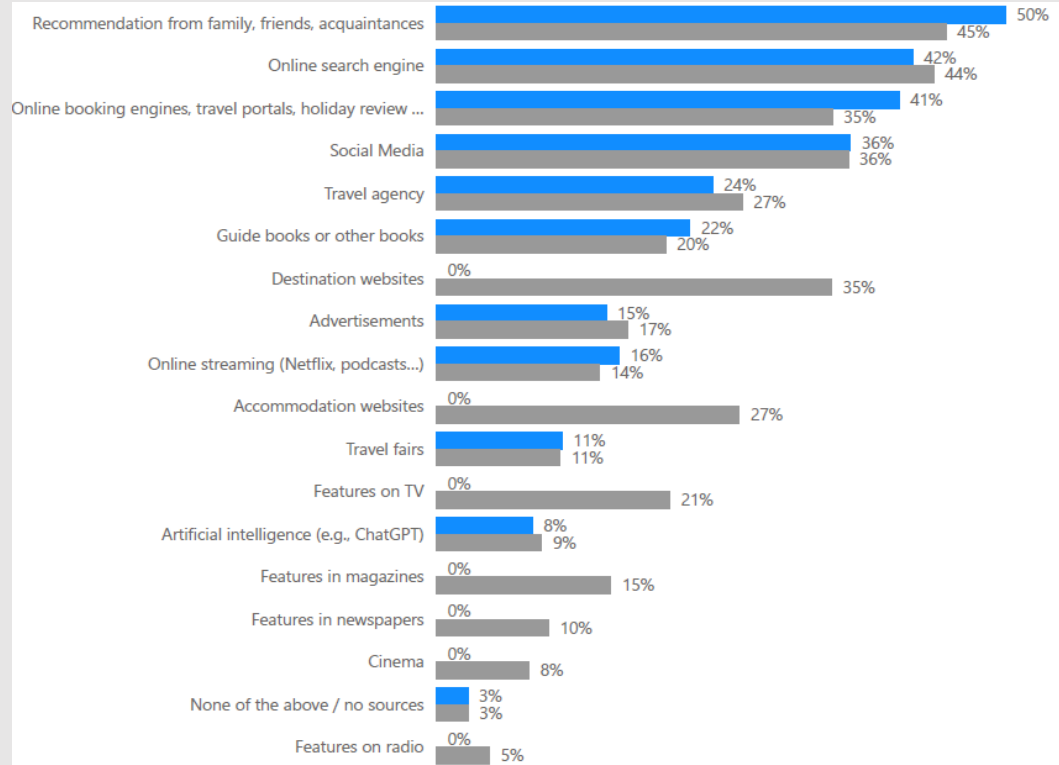
Trip organisation and preferences (1)

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

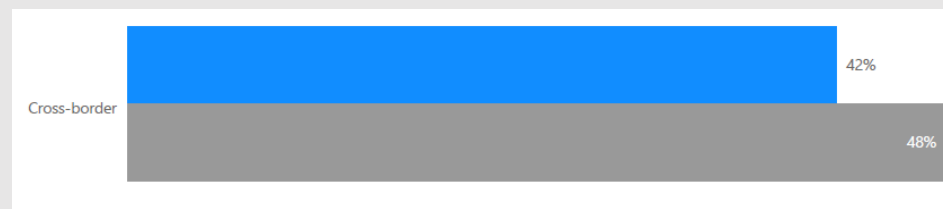


Germany
All inbound

Preferred sources of travel inspiration



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

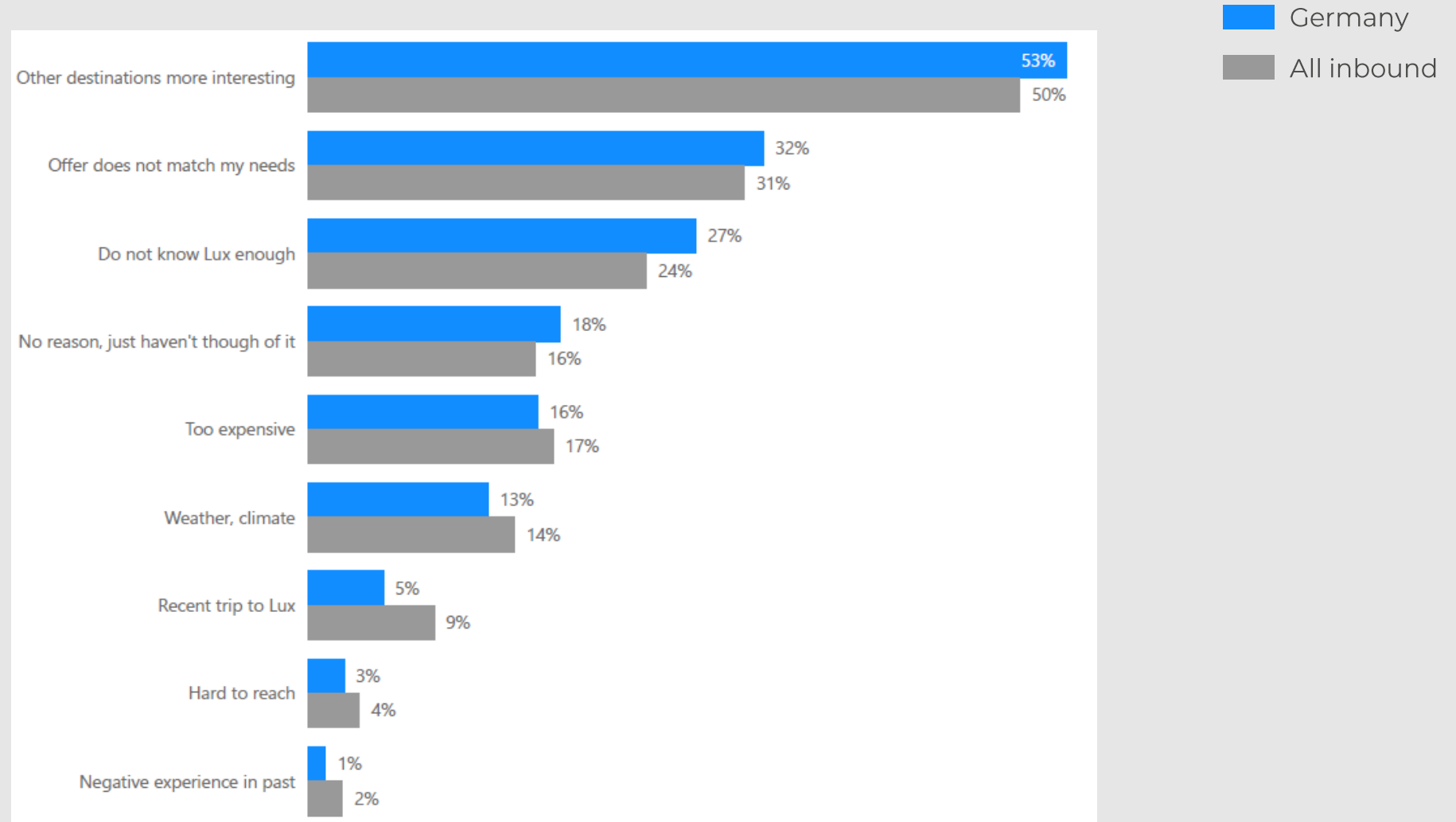


Trip organisation and preferences (2)

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



Reasons for not considering Luxembourg as a destination

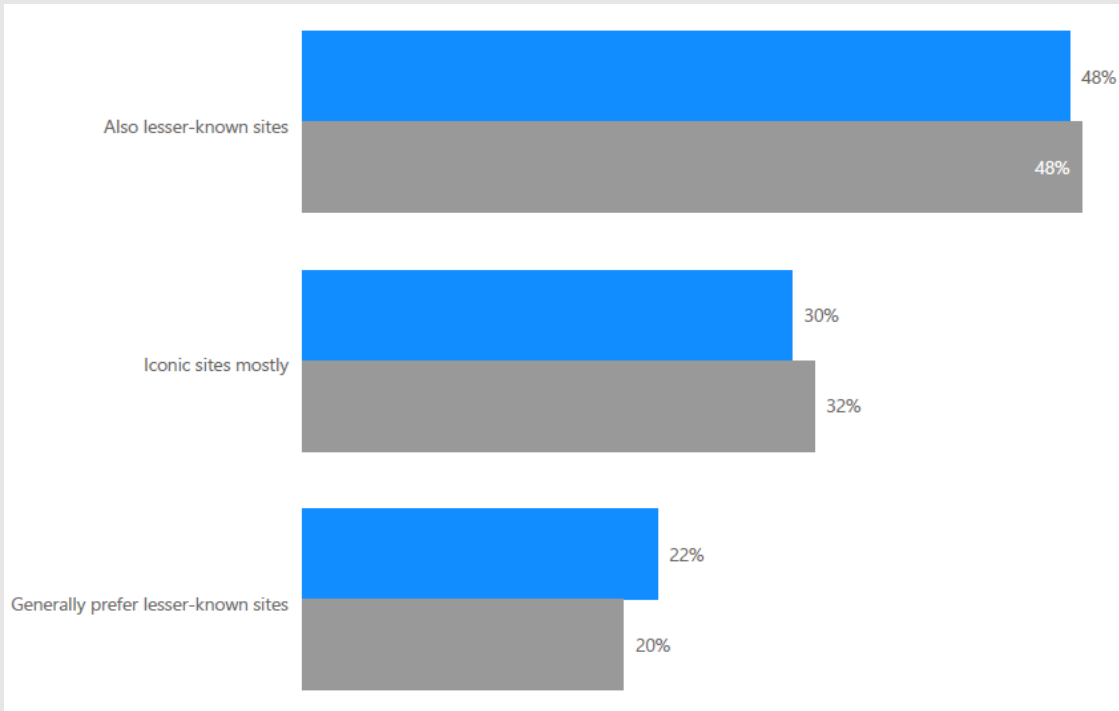


Trip organisation and preference (3)

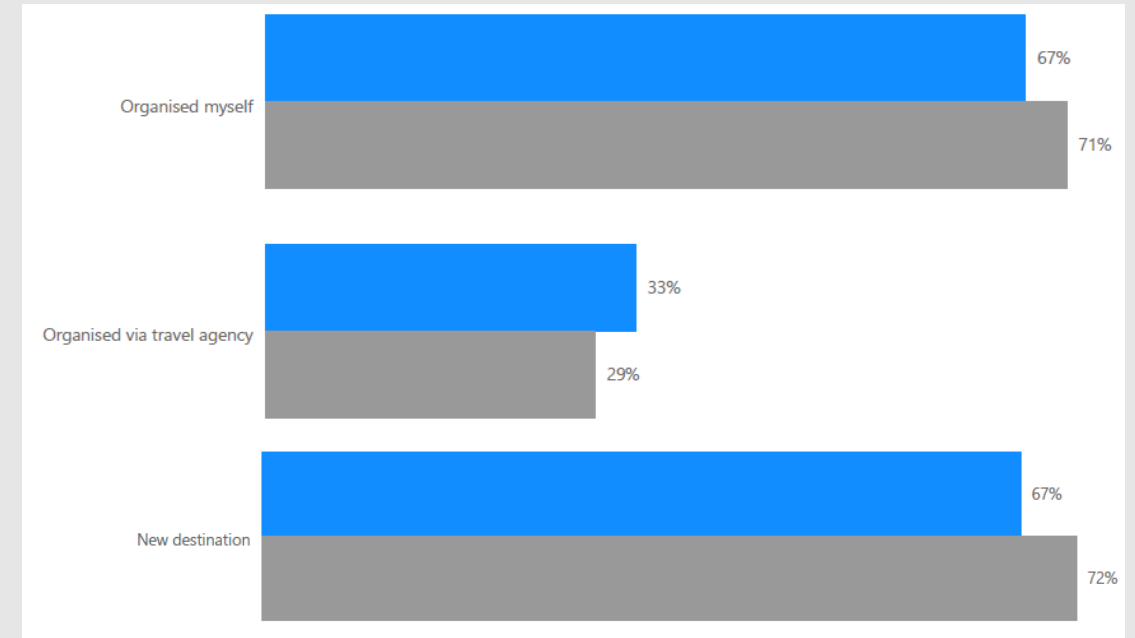
— Average **European source markets**, total vs. Germany



General preference for visiting iconic vs. lesser-known sites



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



Germany
All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



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