Luxembourg for Tourism

Market profile GERMANY 2024

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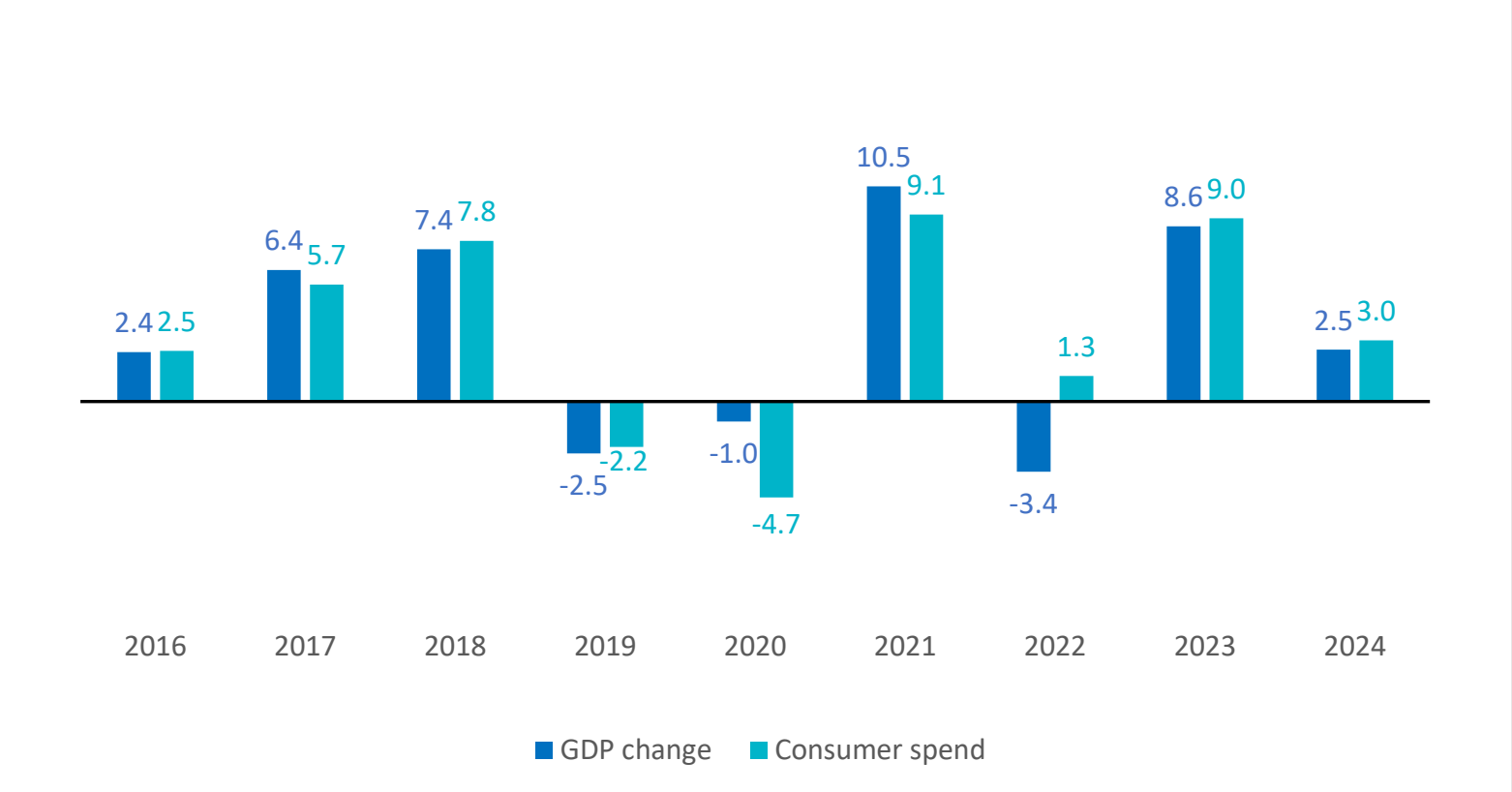
Economic indicators & General Travel Demand

Economic indicators – General travel demand

GDP and consumer spending, % annual change



Economy & population

GDP ($) per capita
56,157.61

Unemployment (%)
5.98

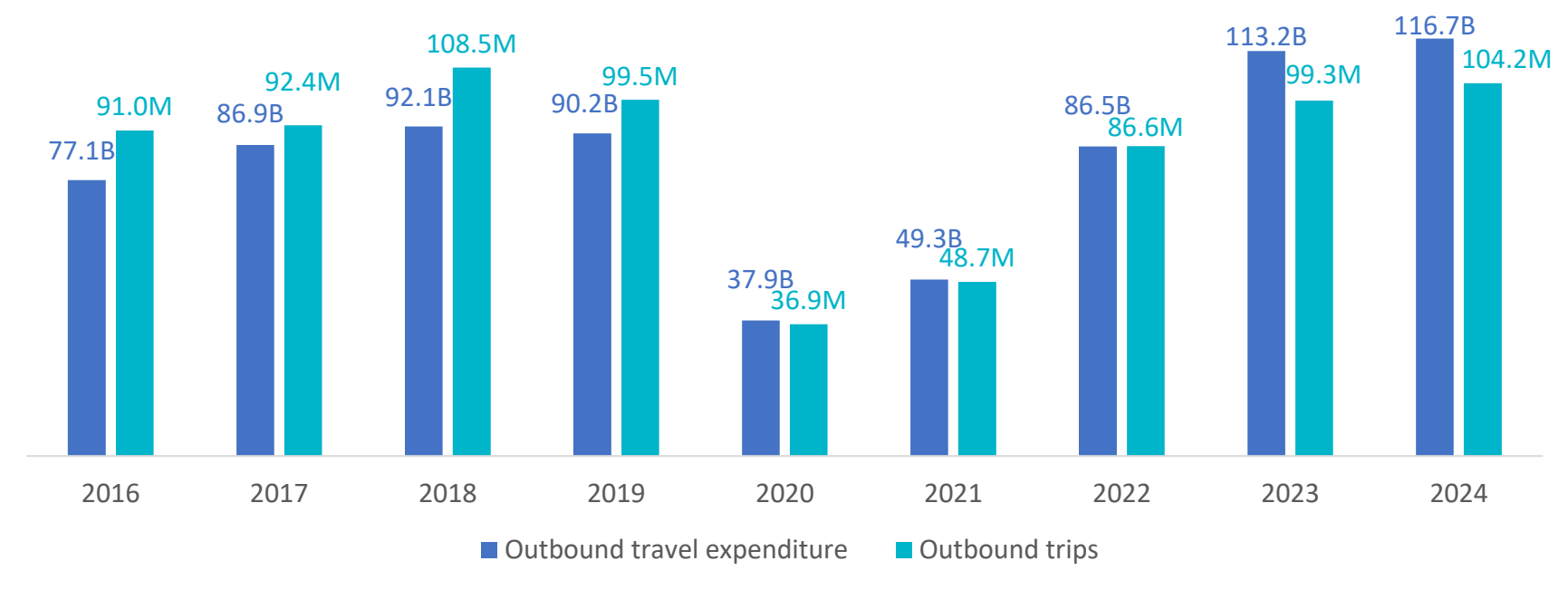
Inflation(%)
2.27

Population
83,473,380

Sources: Oxford Economics.

Economic indicators – General travel demand

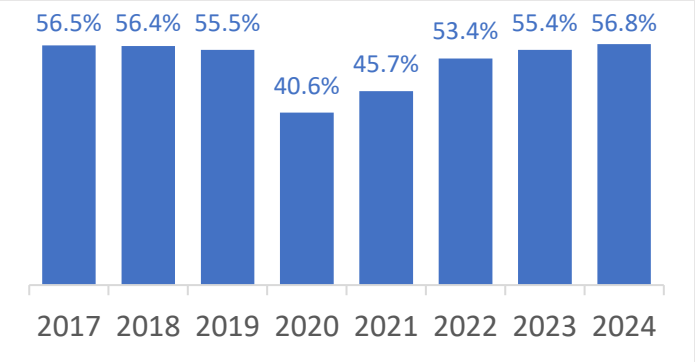
Outbound trips and travel expenditure



Outbound travel intensity
1.25 trips
per inhabitant (2024)

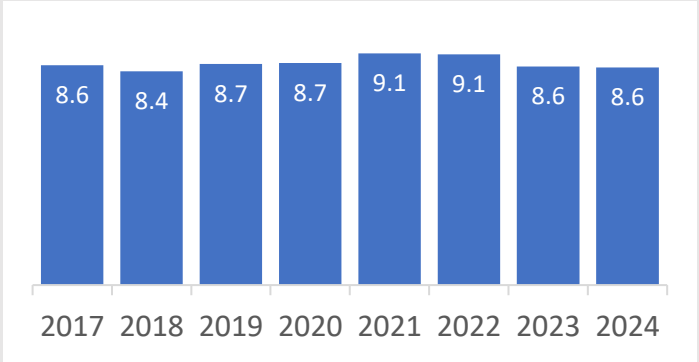
Average spend
per outbound trip (2024)
1,119 $

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%

Sources: Eurostat, Oxford Economics.

Arrivals & nights in paid accommodation

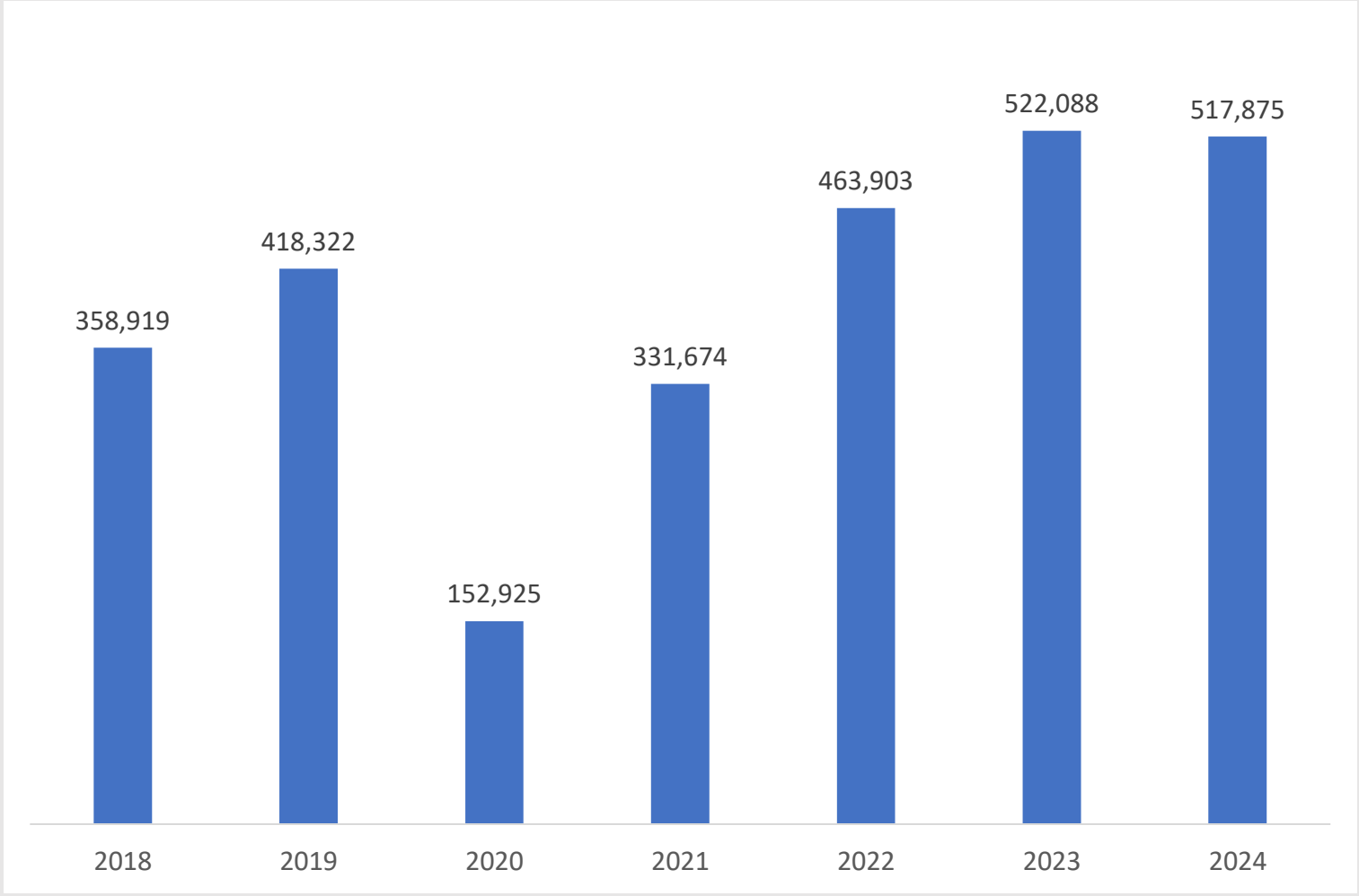
Nights in paid accommodation

2024 and 2018-2024

Nights, paid accommodation, 2024

-1% (vs. 2023)

+24% (vs. 2019)



Source: Statec

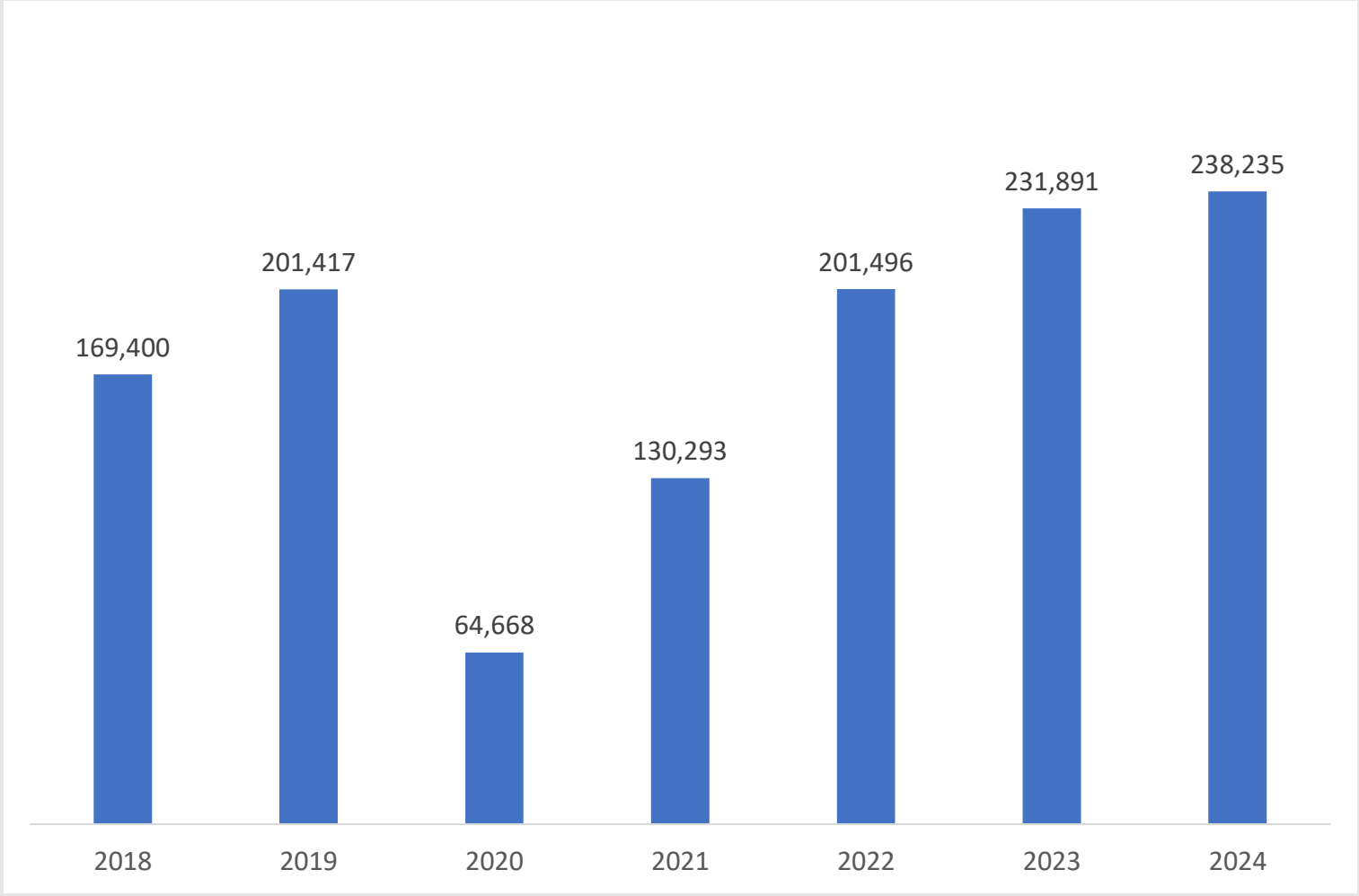
Arrivals in paid accommodation

2024 and 2018-2024

Arrivals,
paid accommodation, 2024

+3% (vs. 2023)

+18% (vs. 2019)



Source: Statec

Length of stay, paid accommodation

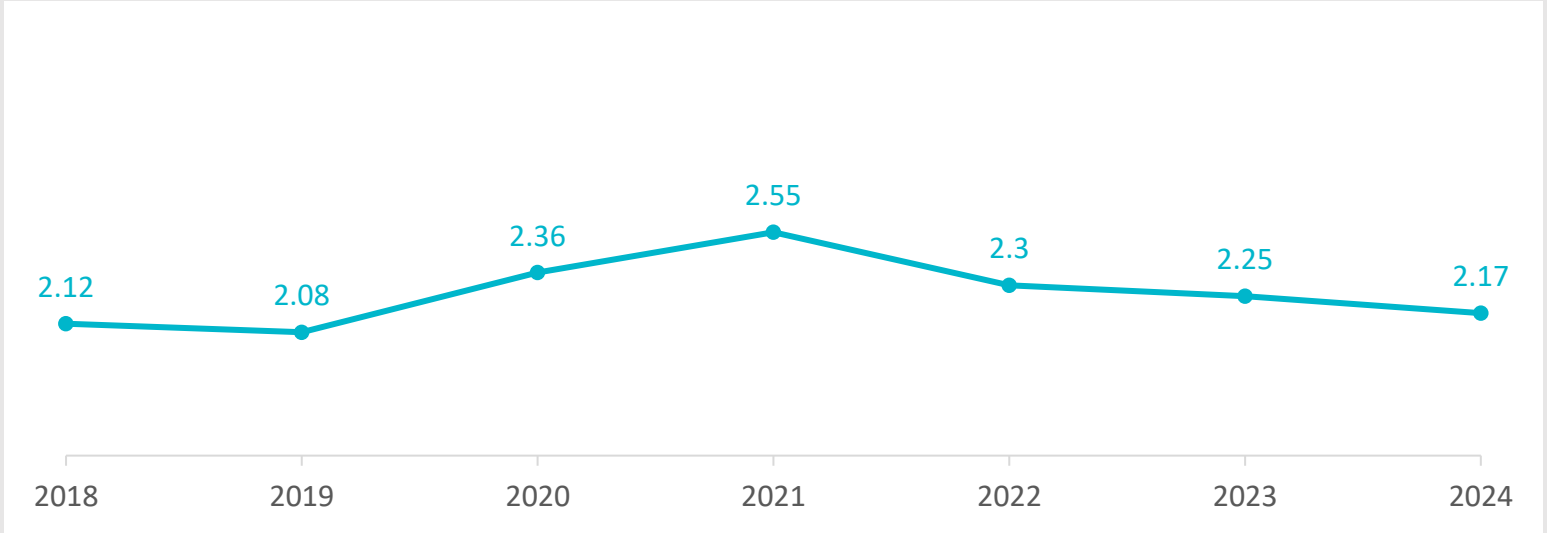
2024 and 2018-2024

Average length of stay, paid accommodation, 2024

2.17 nights

-0.08 nights (vs. 2023)

+0.09 nights (vs. 2019)

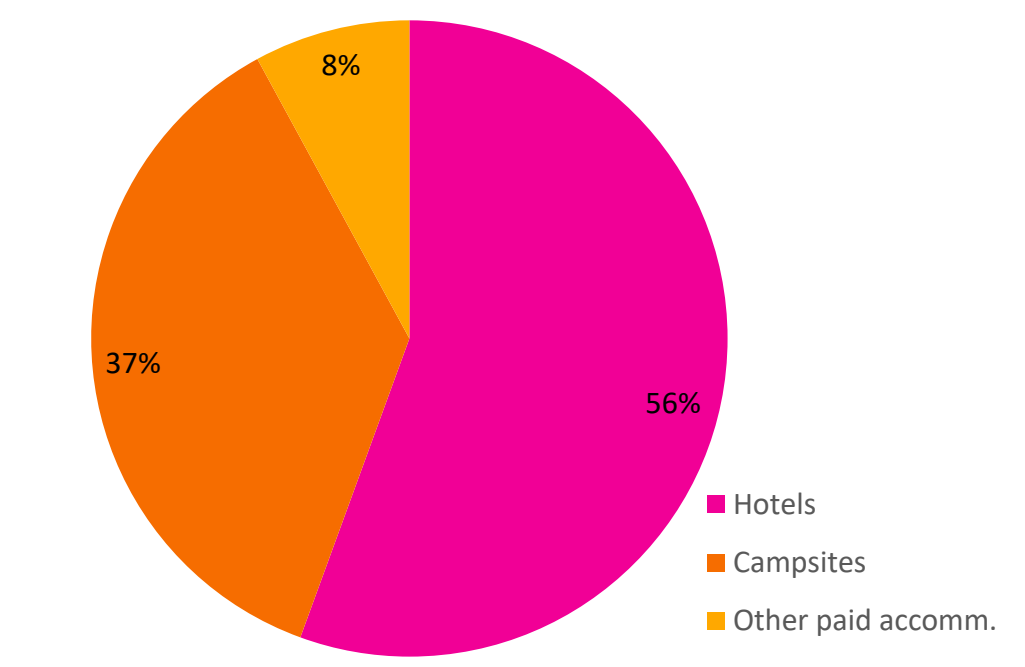


Source: Statec

Nights & arrivals in paid accommodation

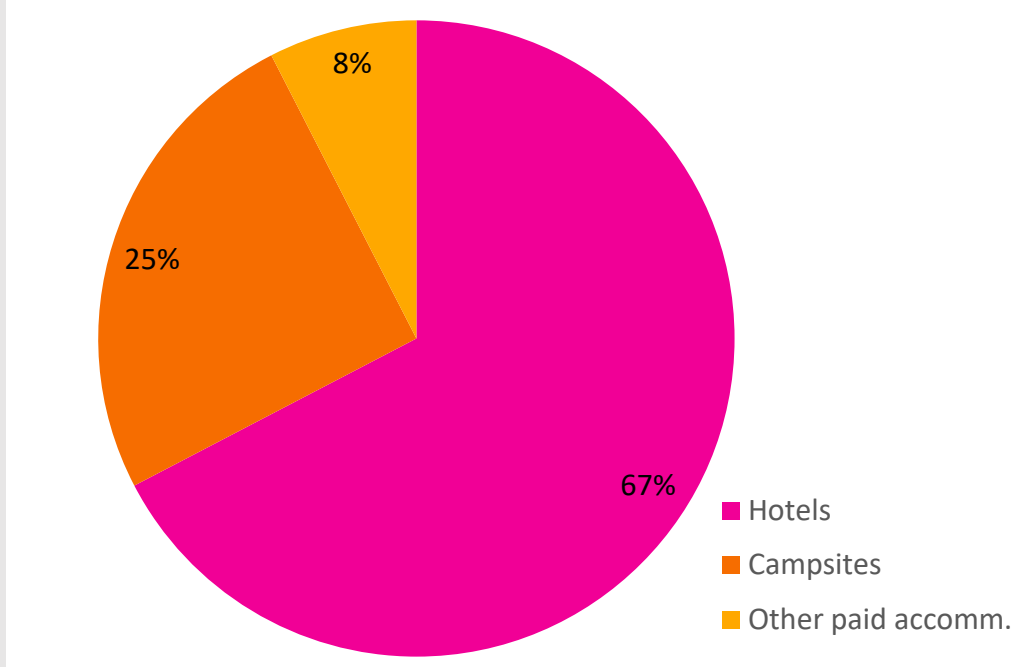
Type of accommodation, 2024

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



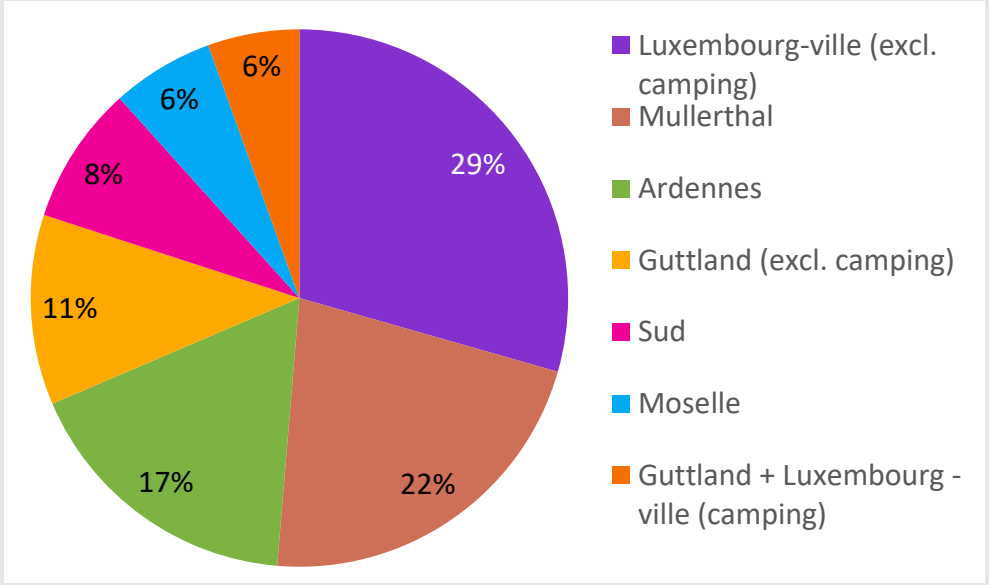
Hotels	160.449	+2% (vs. 2023)	+6% (vs. 2019)
Campsites	59.831	+1% (vs. 2023)	+82% (vs. 2019)
Other paid accomm.	17.955	+17% (vs. 2023)	+8% (vs. 2019)

Source: Statec

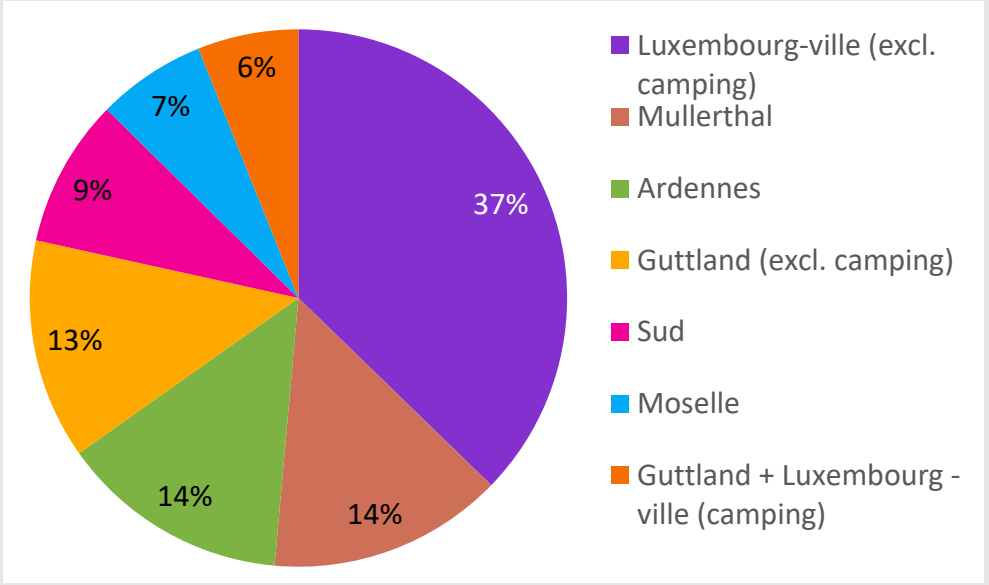
Nights & arrivals in paid accommodation

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)

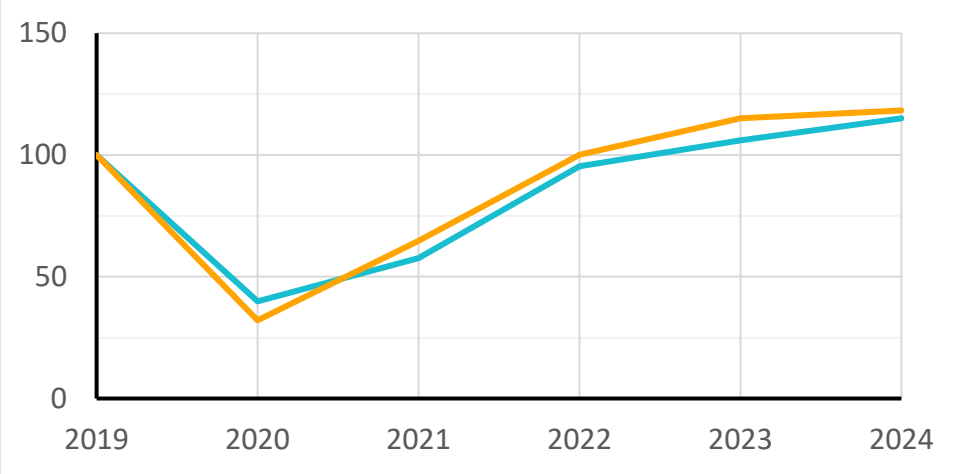
Lux.-City (excl. camping)	88.768	+5% (vs. 2023)	+4% (vs. 2019)
MPSL	33.728	+5% (vs. 2023)	+39% (vs. 2019)
Eislek	32.831	+10% (vs. 2023)	+32% (vs. 2019)
Guttland (excl. camping)	31.569	-1% (vs. 2023)	+31% (vs. 2019)
South	21.253	-6% (vs. 2023)	+6% (vs. 2019)
Moselle	15.628	-1% (vs. 2023)	+4% (vs. 2019)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

Source: Statec

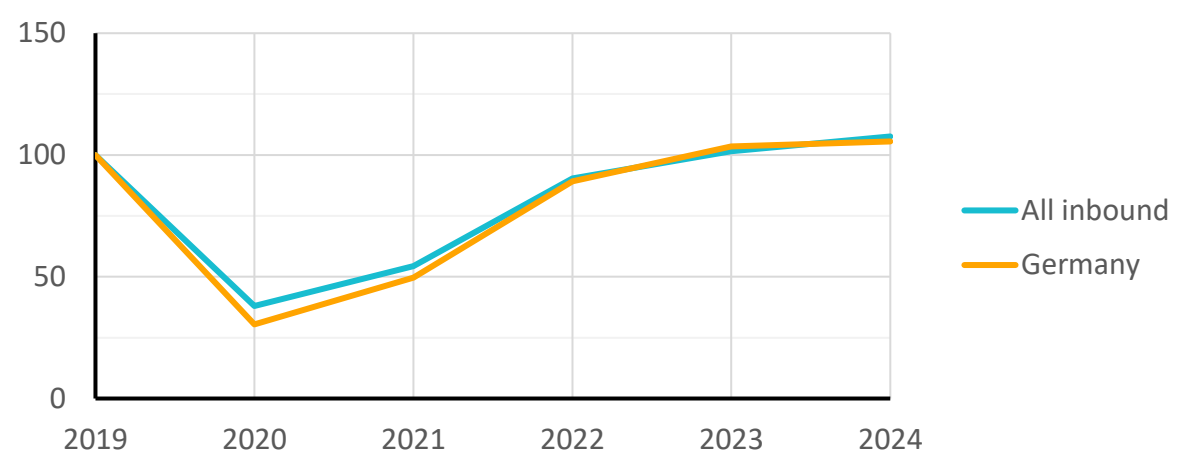
Arrivals in paid accommodation

Trends 2019-2024

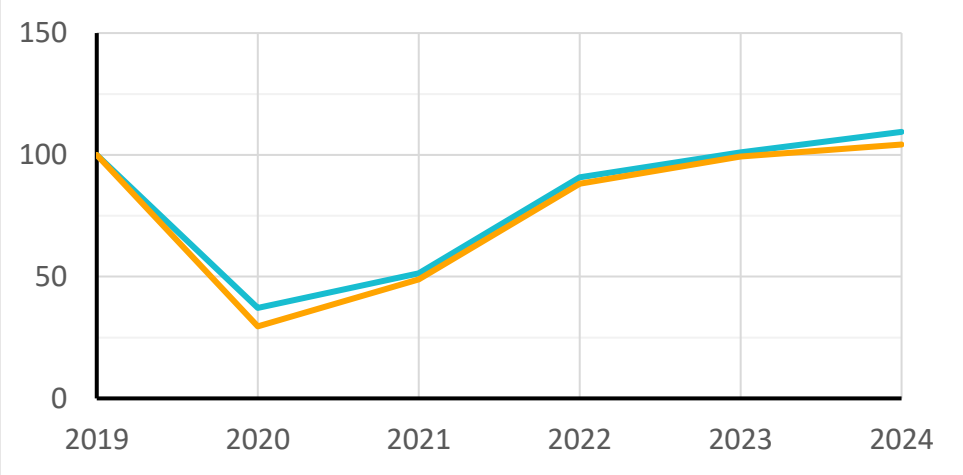
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

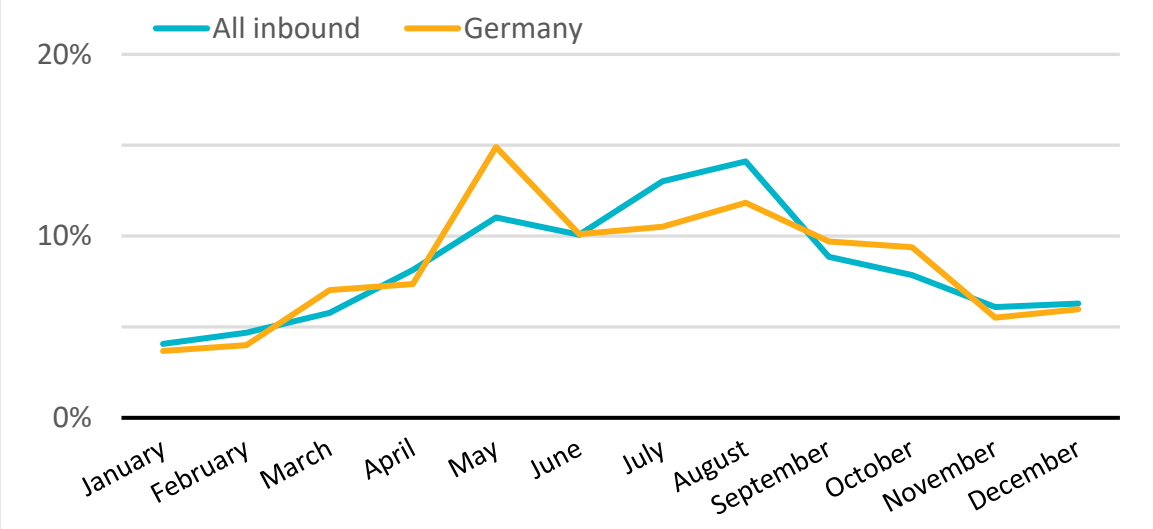


(*) excluding camping.
Source: Statec

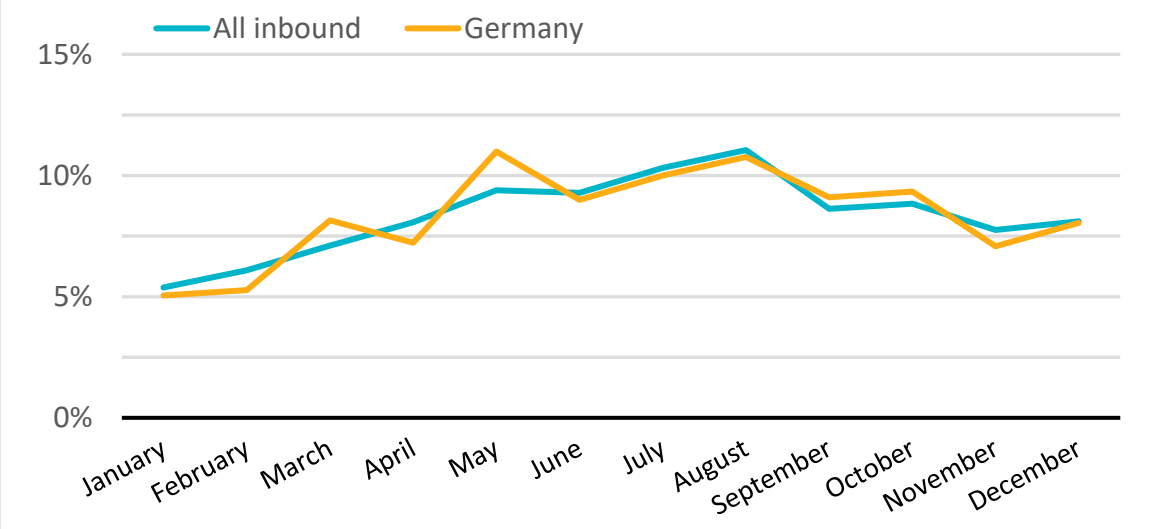
Arrivals in paid accommodation

Seasonality

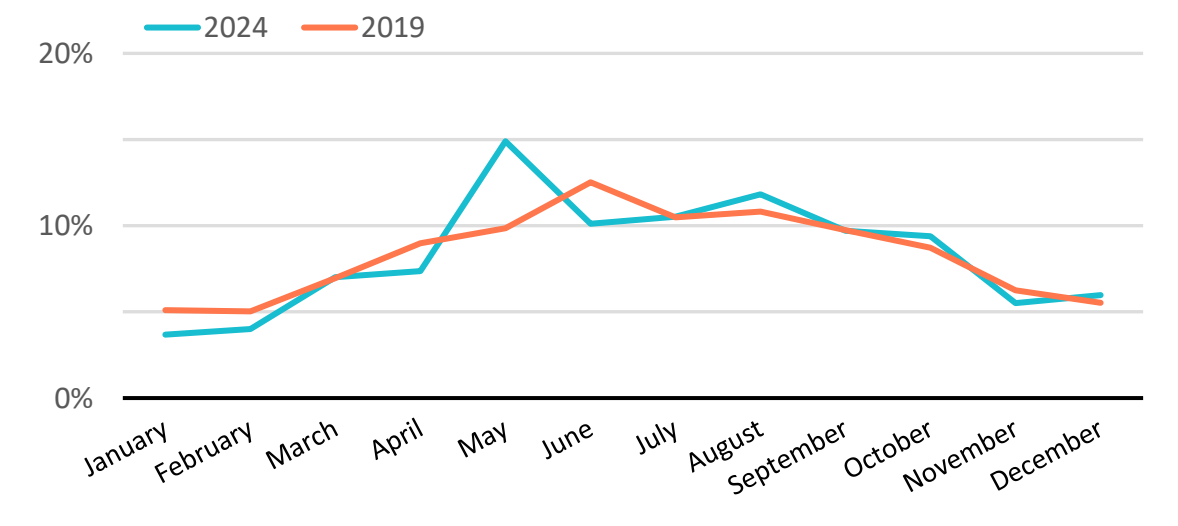
All paid accommodation, 2024



Hotels, 2024



All paid accommodation, arrivals from Germany



Source: Statec

Short-term rentals

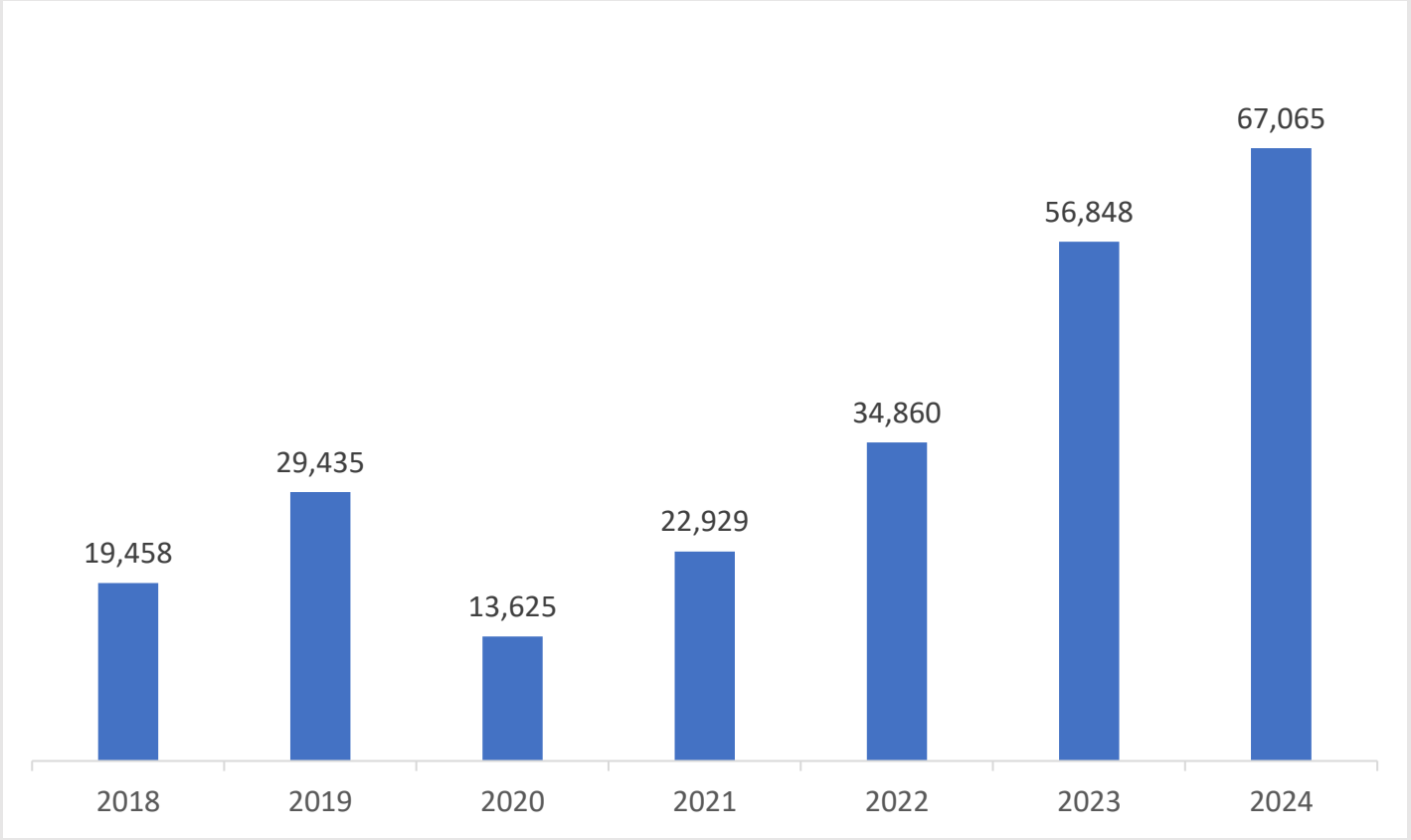
2024 and 2018-2024

Nights,
Short-term rentals, 2024

18% (vs. 2023)

128% (vs. 2019)

Nights,
Short-term rentals, 2018-2024



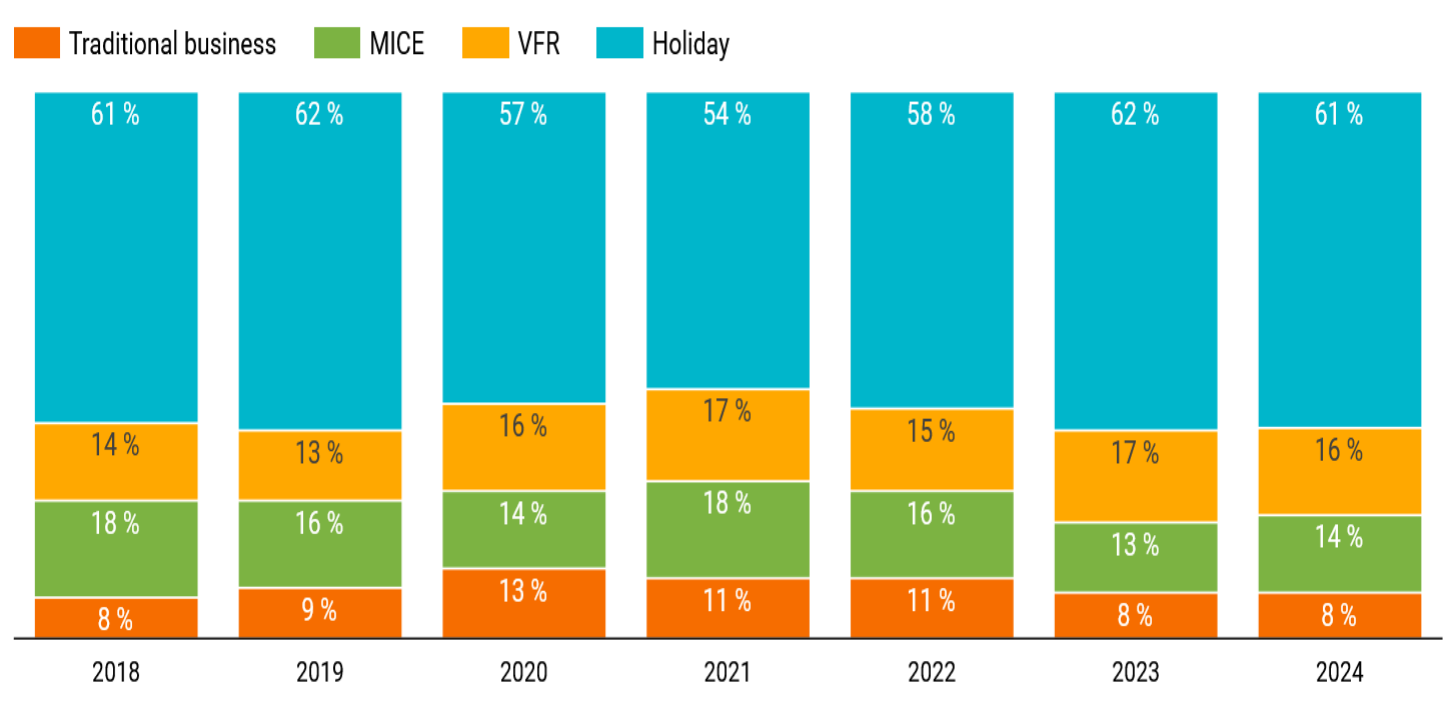
Source: Eurostat (experimental statistics).

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%

Source: World Travel Monitor/IPK International.

Inbound same-day trips to Luxembourg

2024

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

935.000

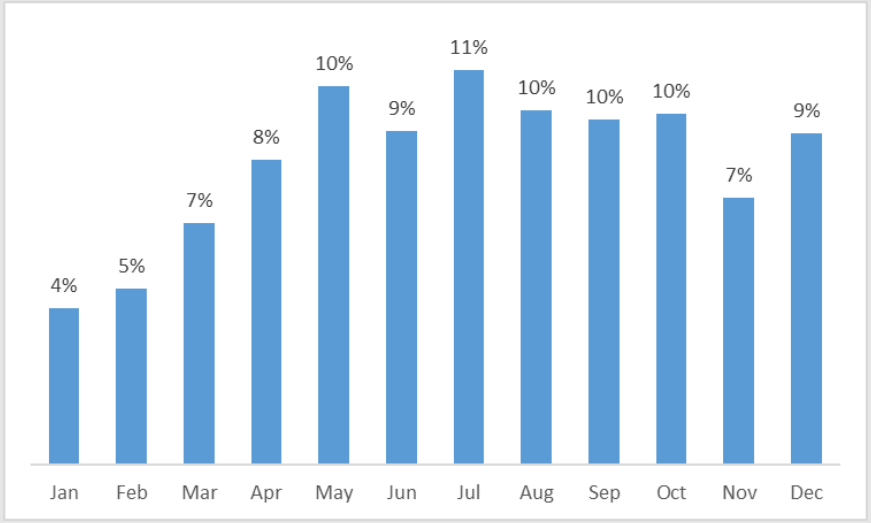
-10% (vs. 2023)

Average length of same-day trips

6,7 h

-0,2 h (vs. 2023)

Seasonality
% of same-day trips

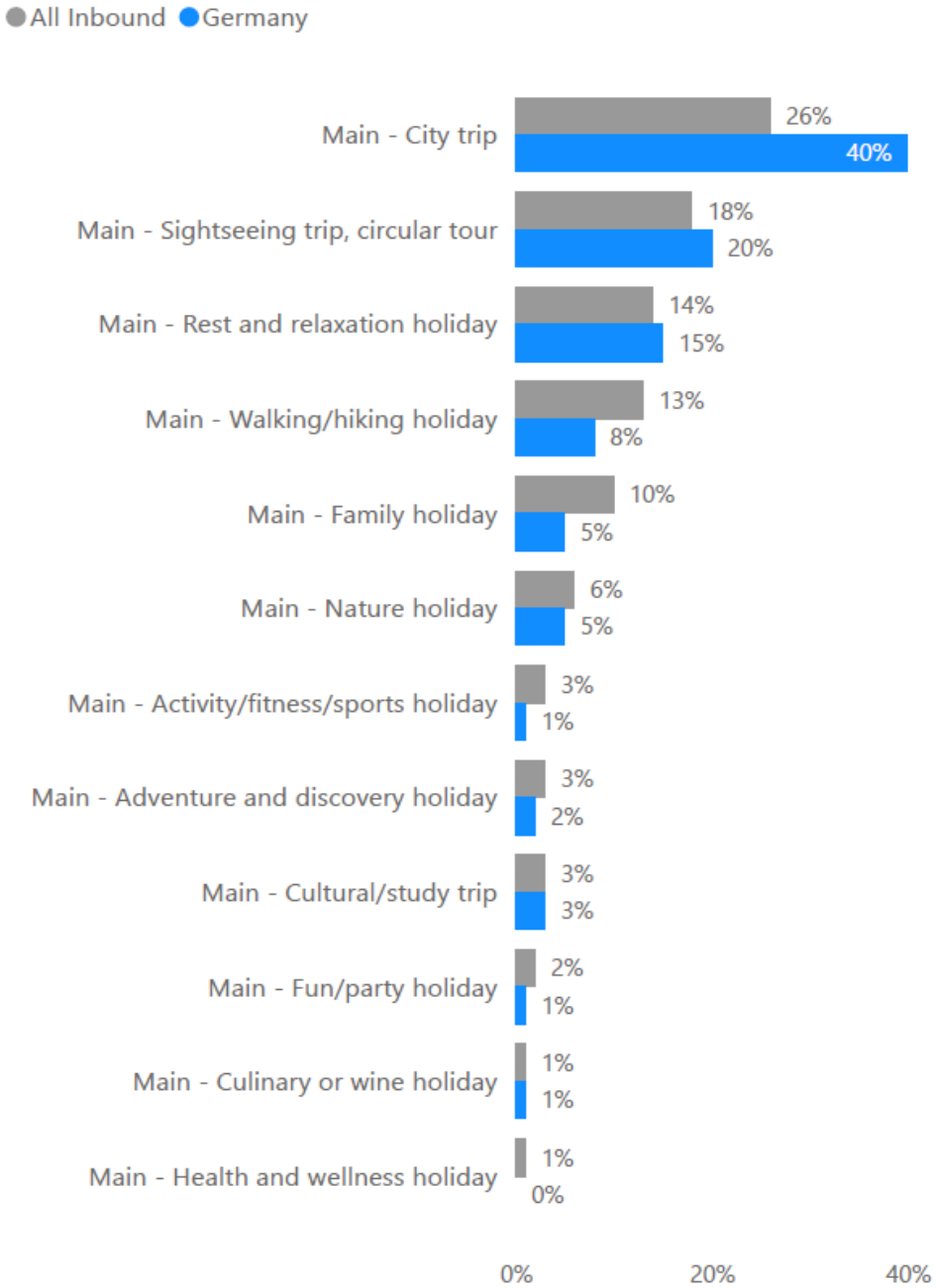


Sources: LFT estimates, Mobile phone data (Editus/LFT), LFT/Ilres Visitor Survey.

Travel behaviour of inbound leisure visitors

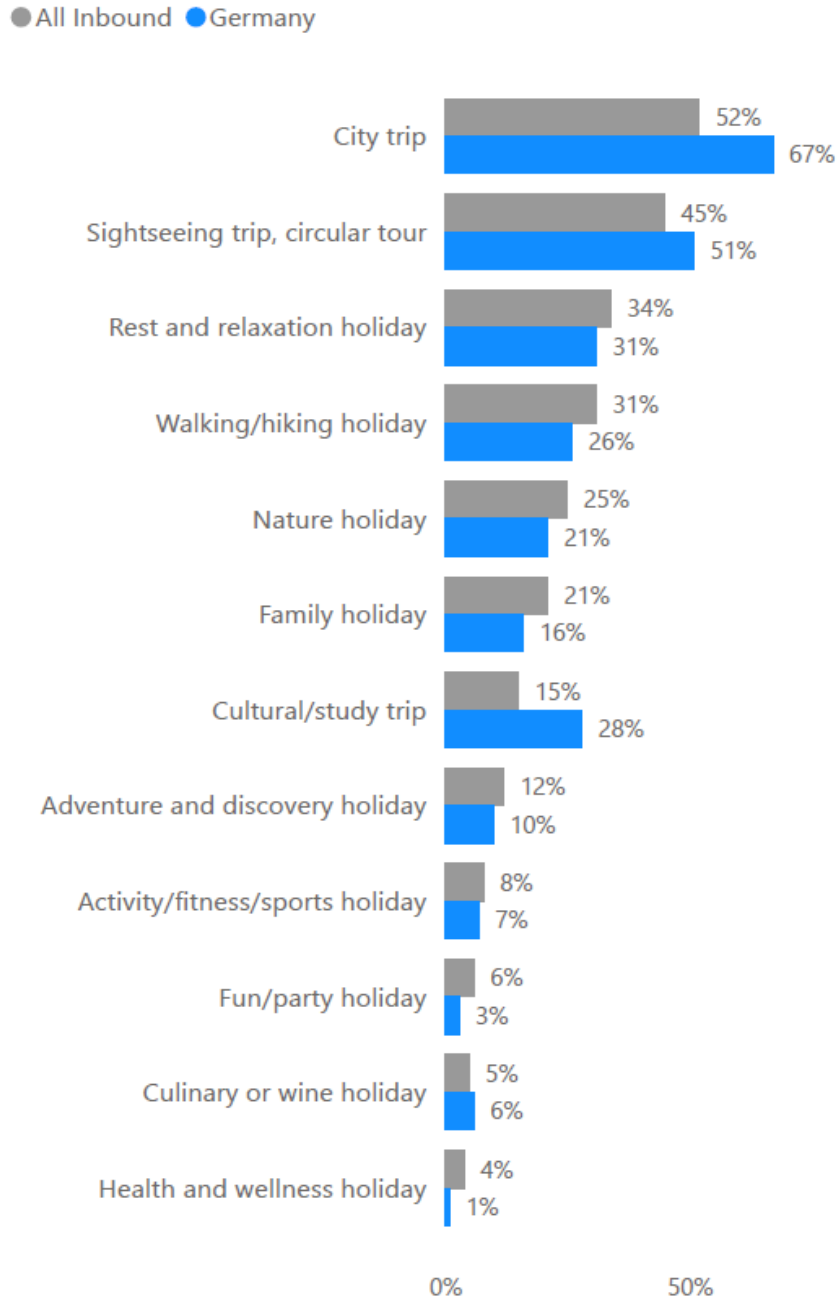
Main holiday types

Visitors with overnight



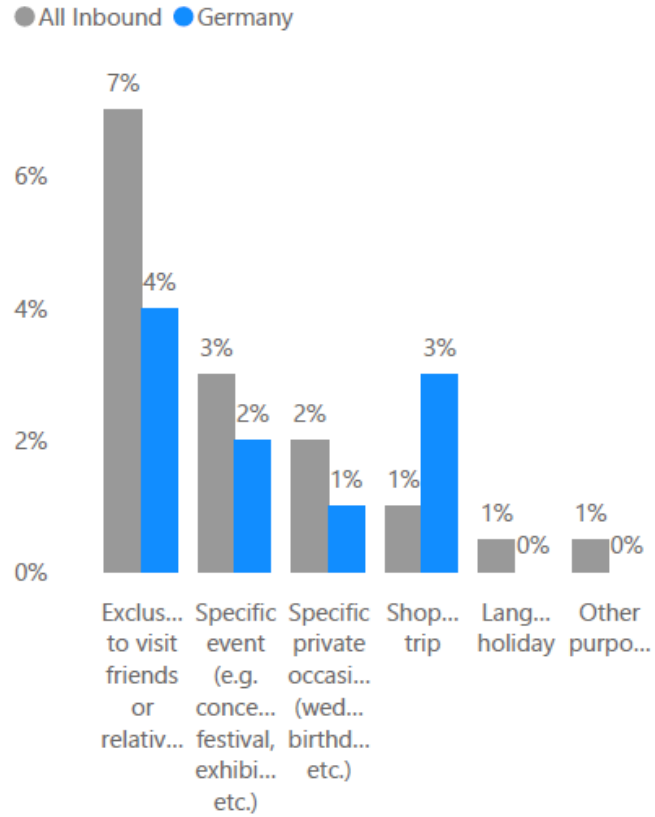
All holiday types

Visitors with overnight



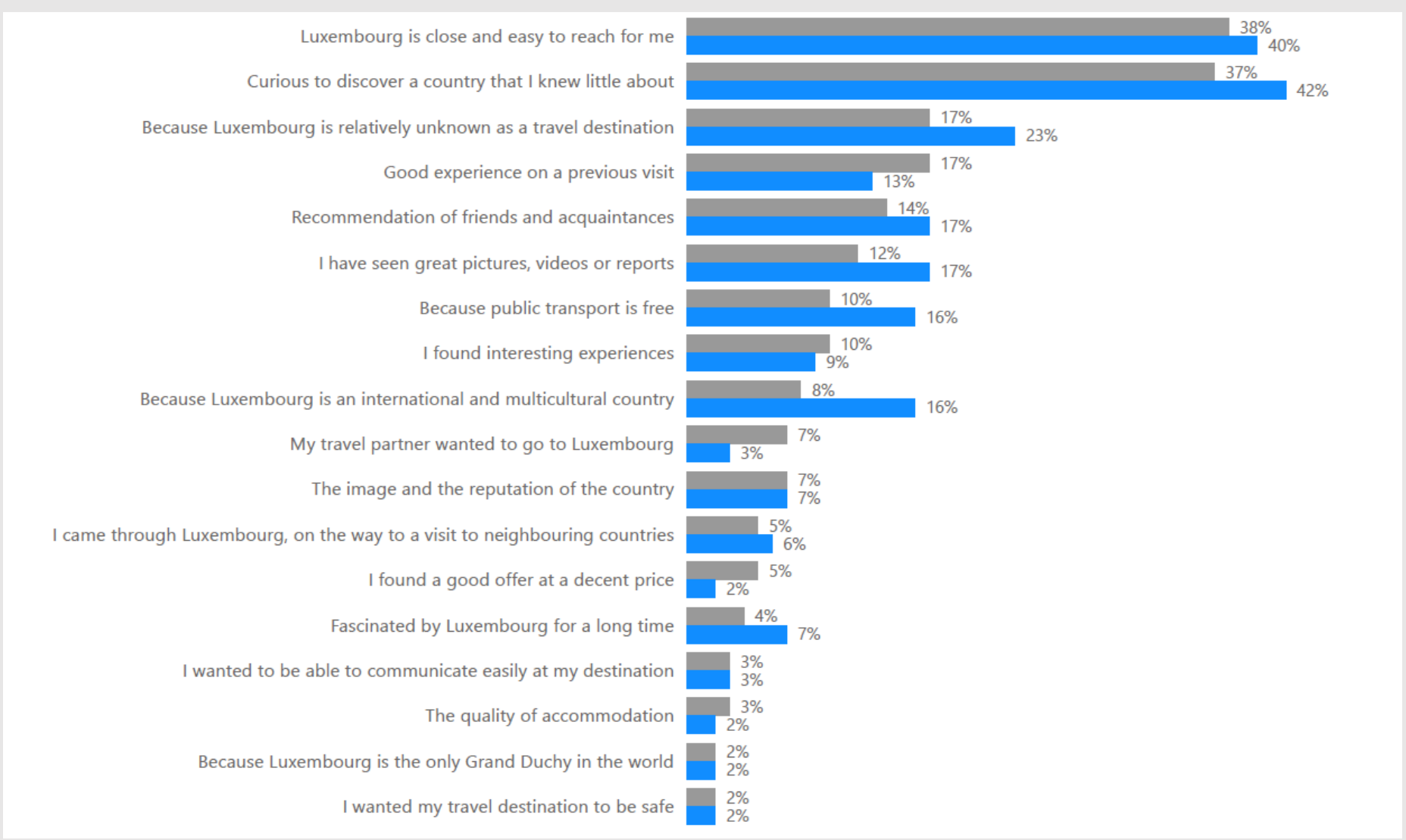
Main purpose of overnight trip

(if not holiday)



Key decision criteria for choosing Luxembourg

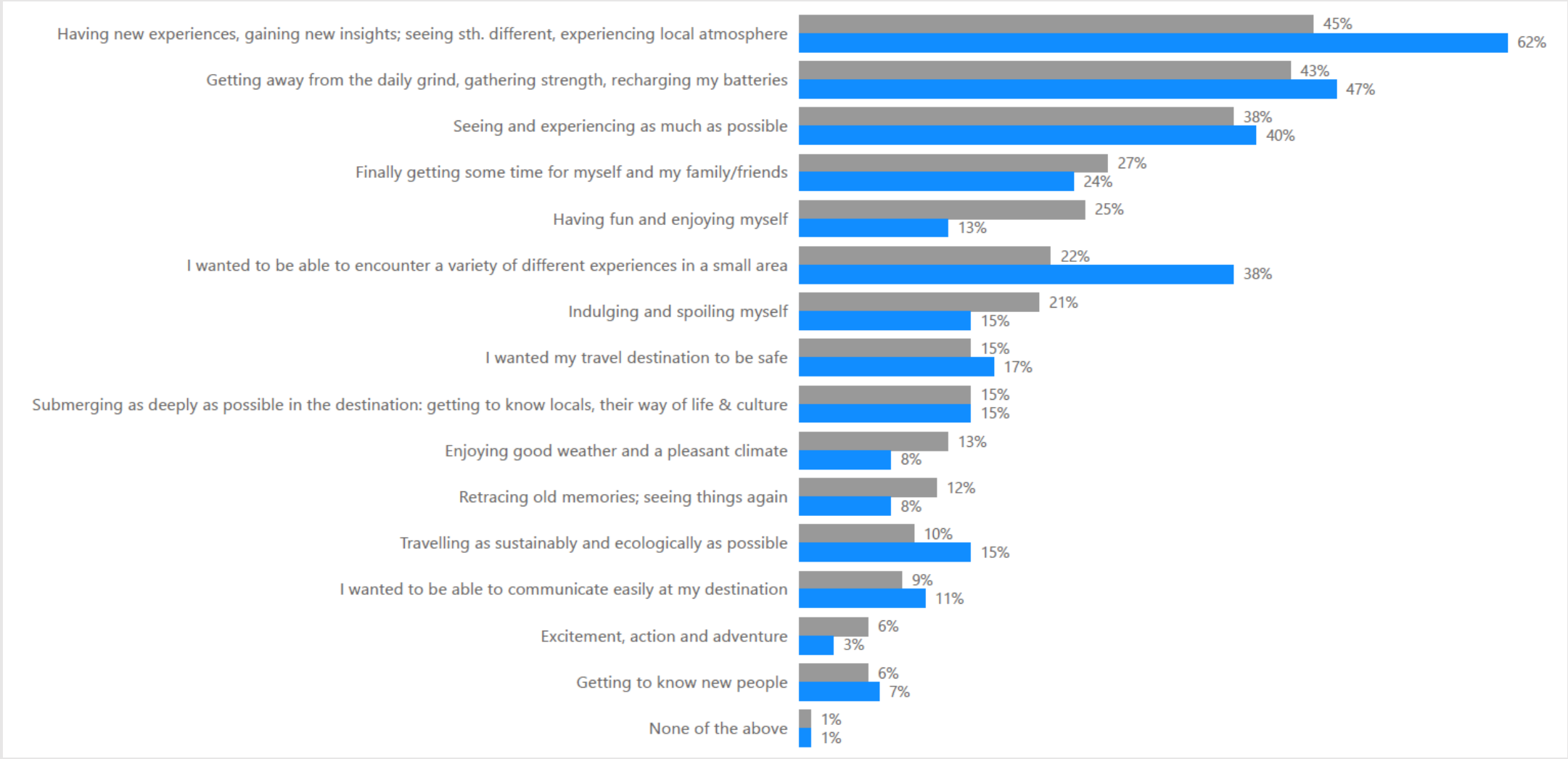
Inbound leisure visitors with overnight (*), 2023-2024



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

Key travel motives

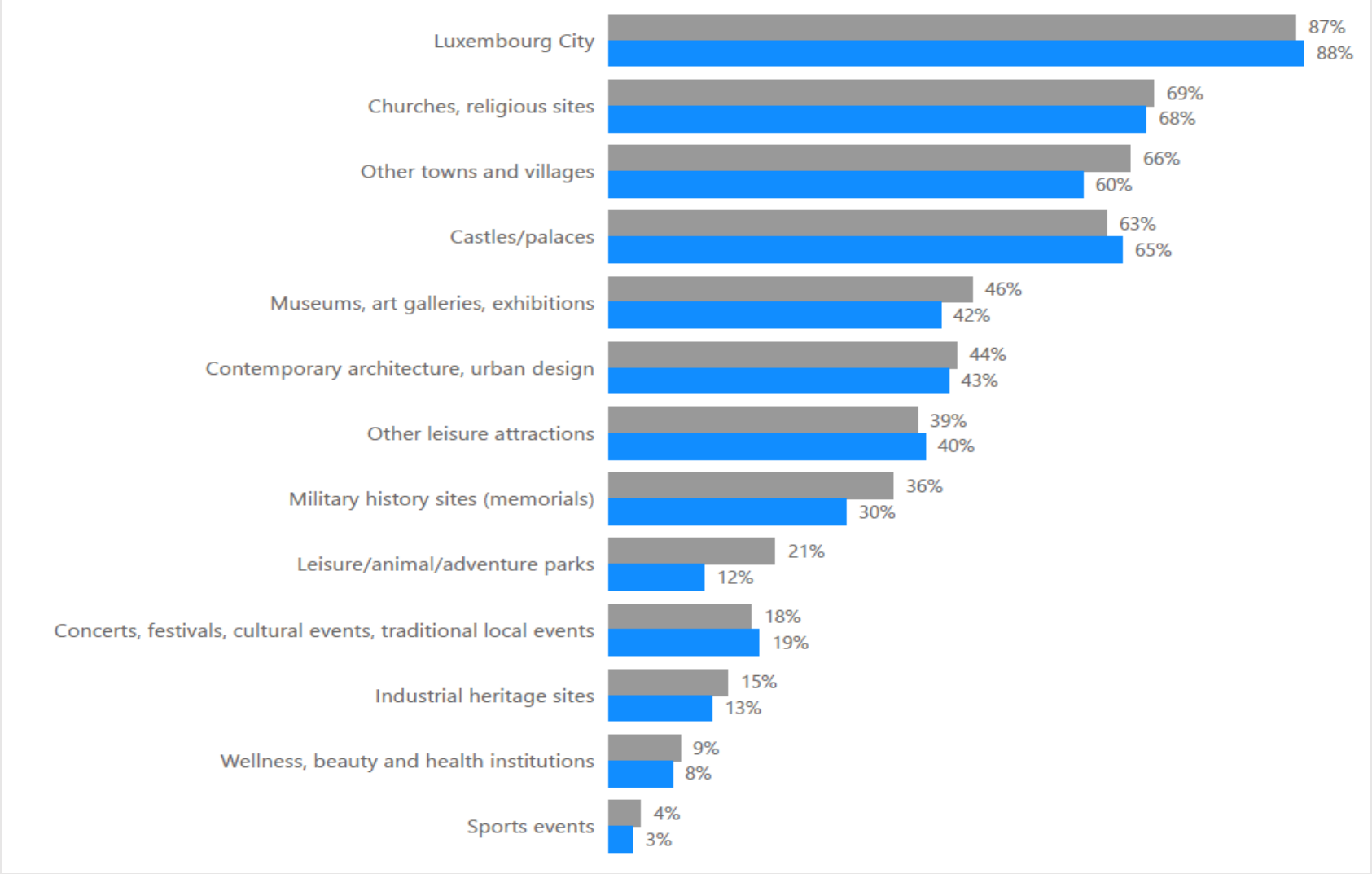
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Type of places visited in Luxembourg

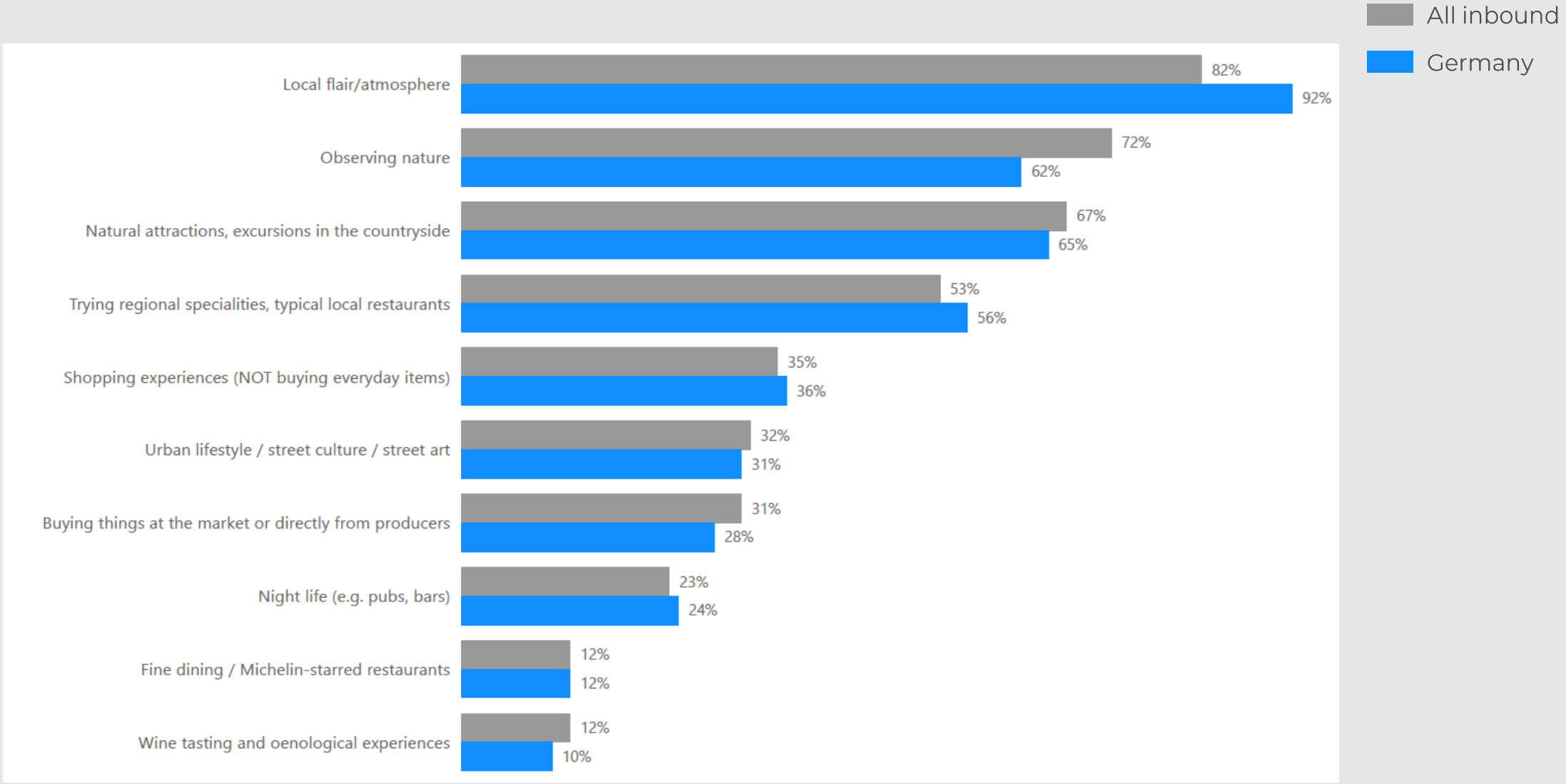
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Non-sporting activities undertaken in Luxembourg

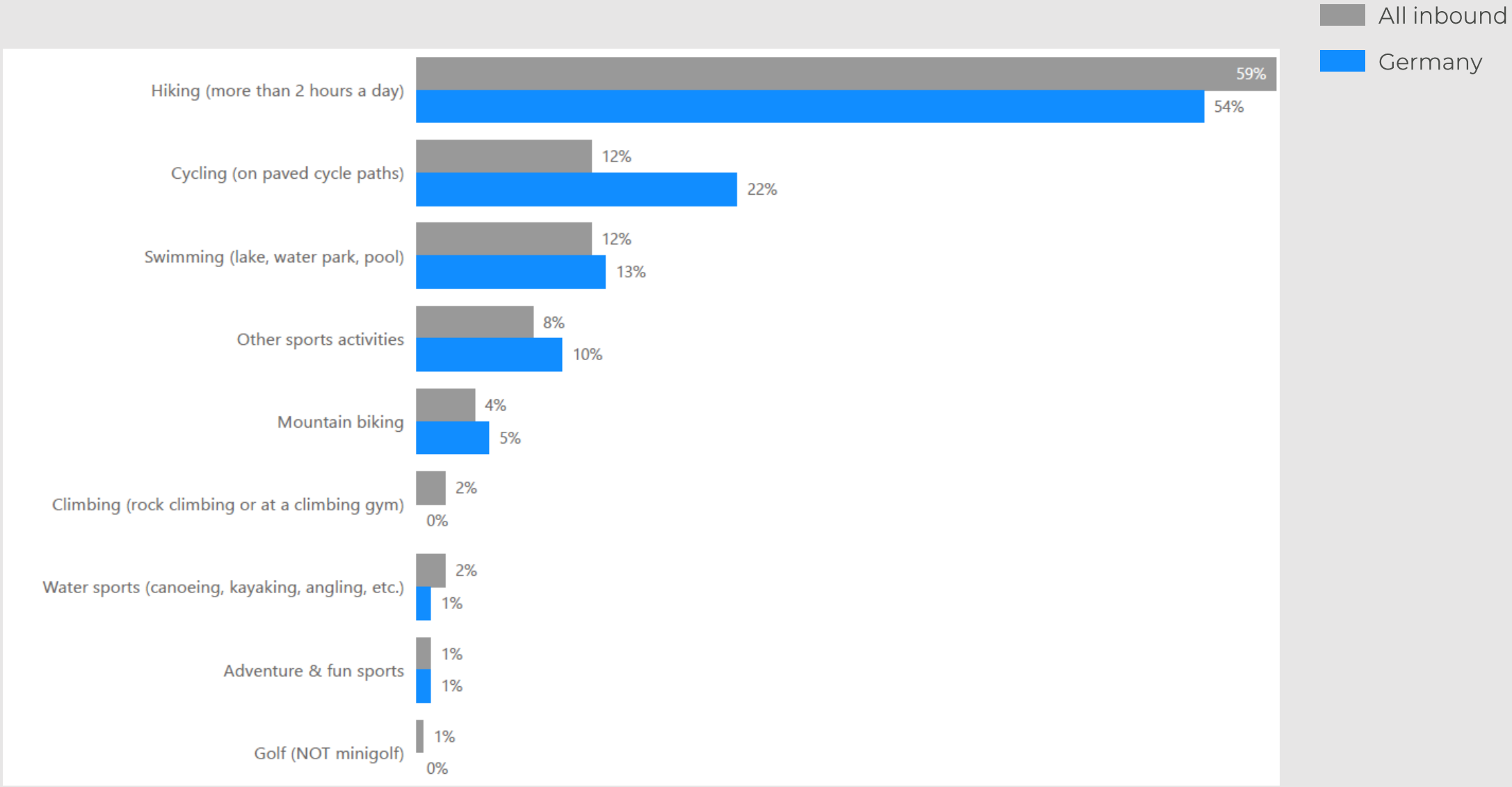
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Sporting activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

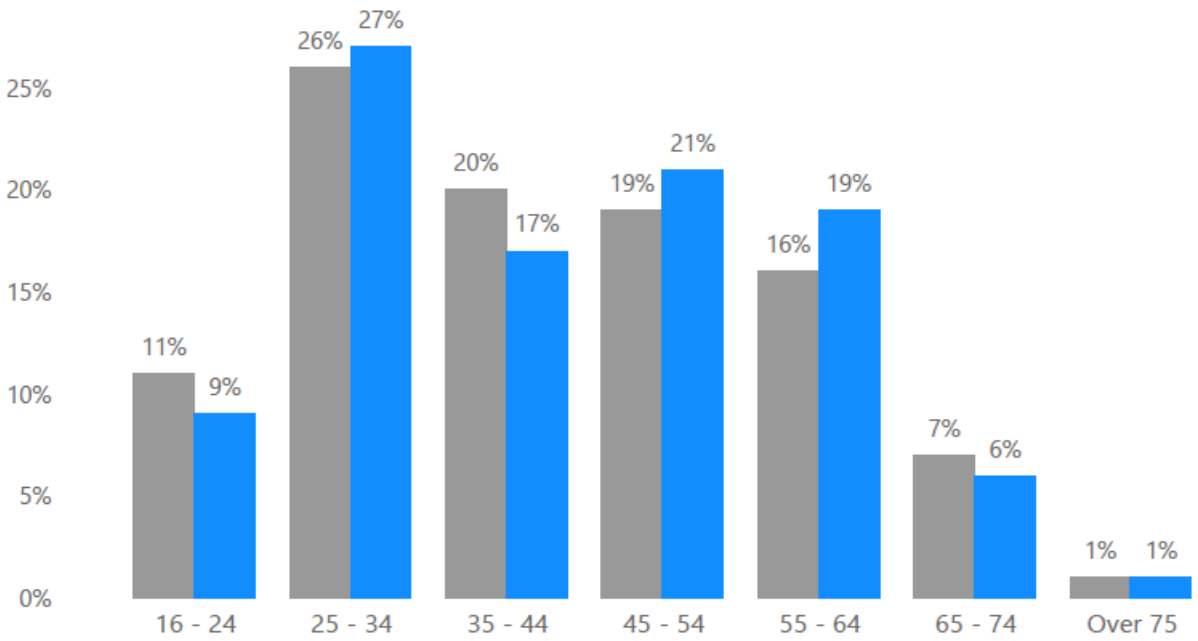
Age groups

Inbound leisure visitors with overnight, 2023-2024

All inbound
Germany

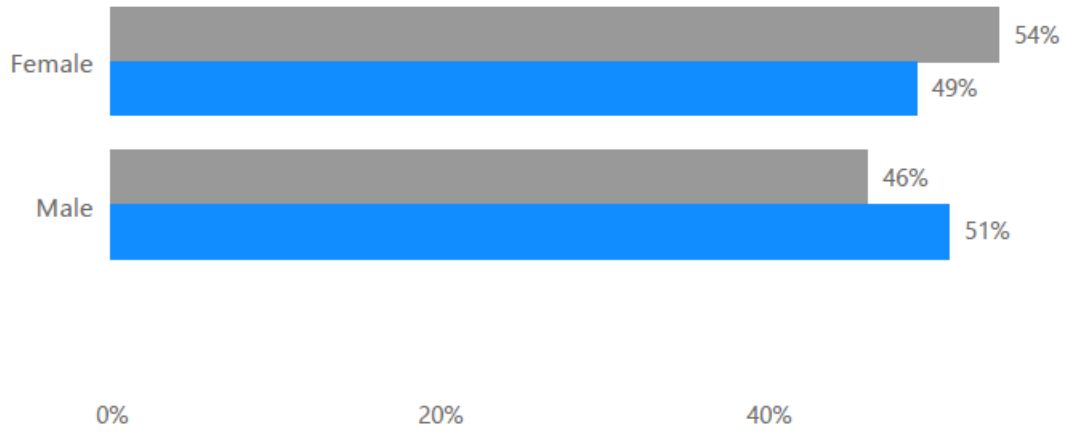
Age

Visitors with overnight



Gender

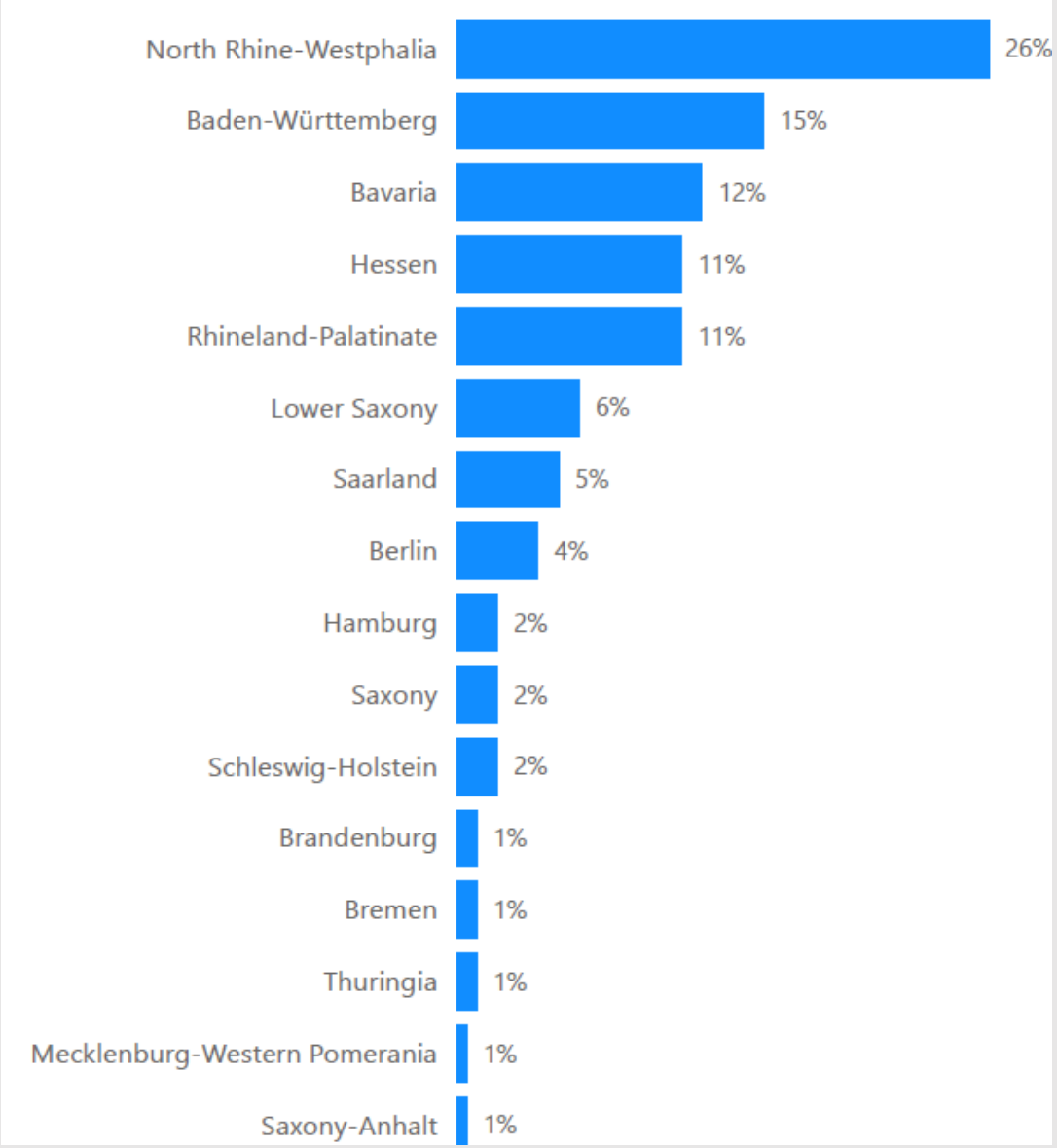
Visitors with overnight



Source: LFT/Ilres Visitor Survey.

Region of origin

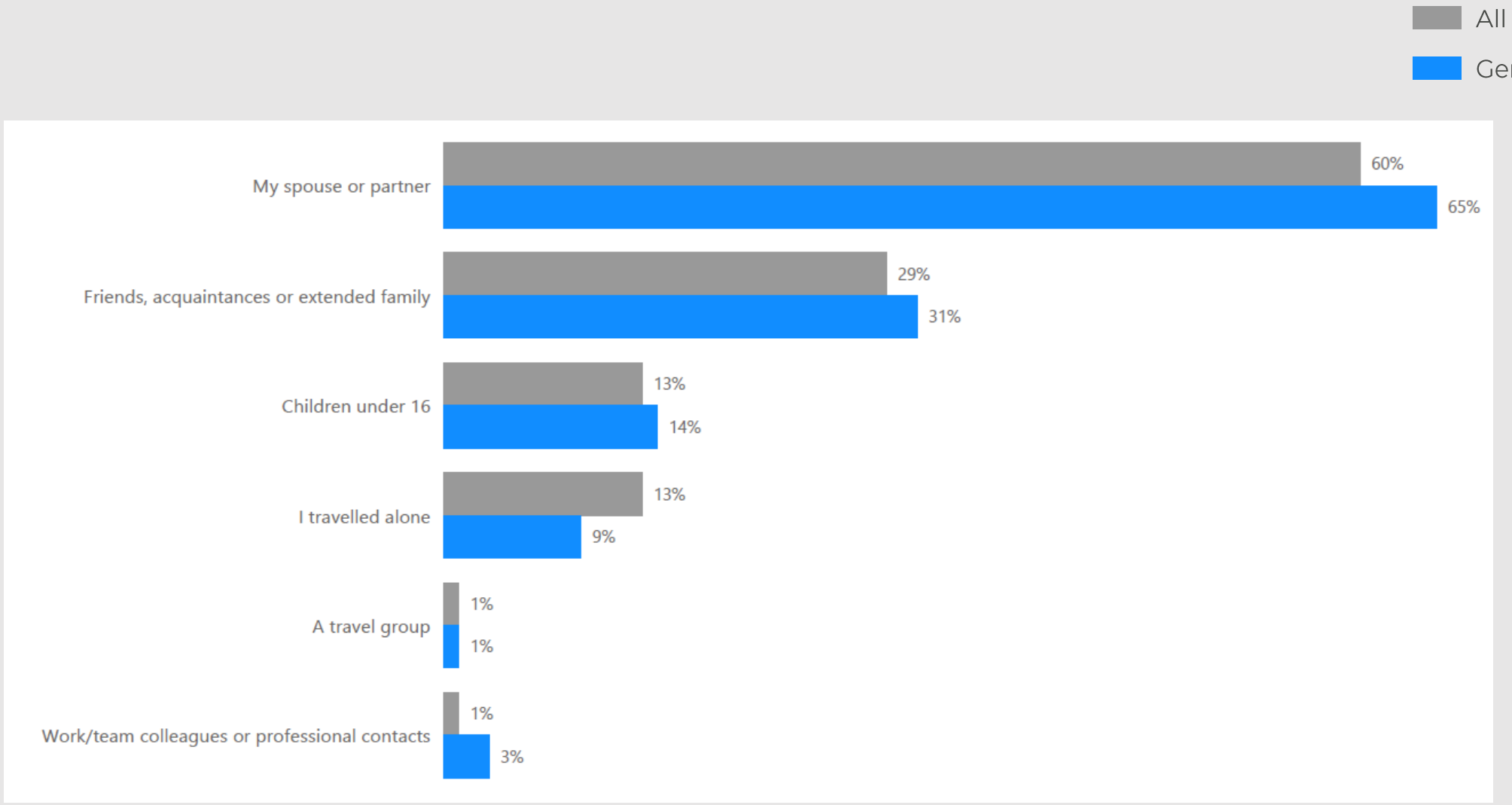
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Travel party

Inbound leisure visitors with overnight, 2023-2024



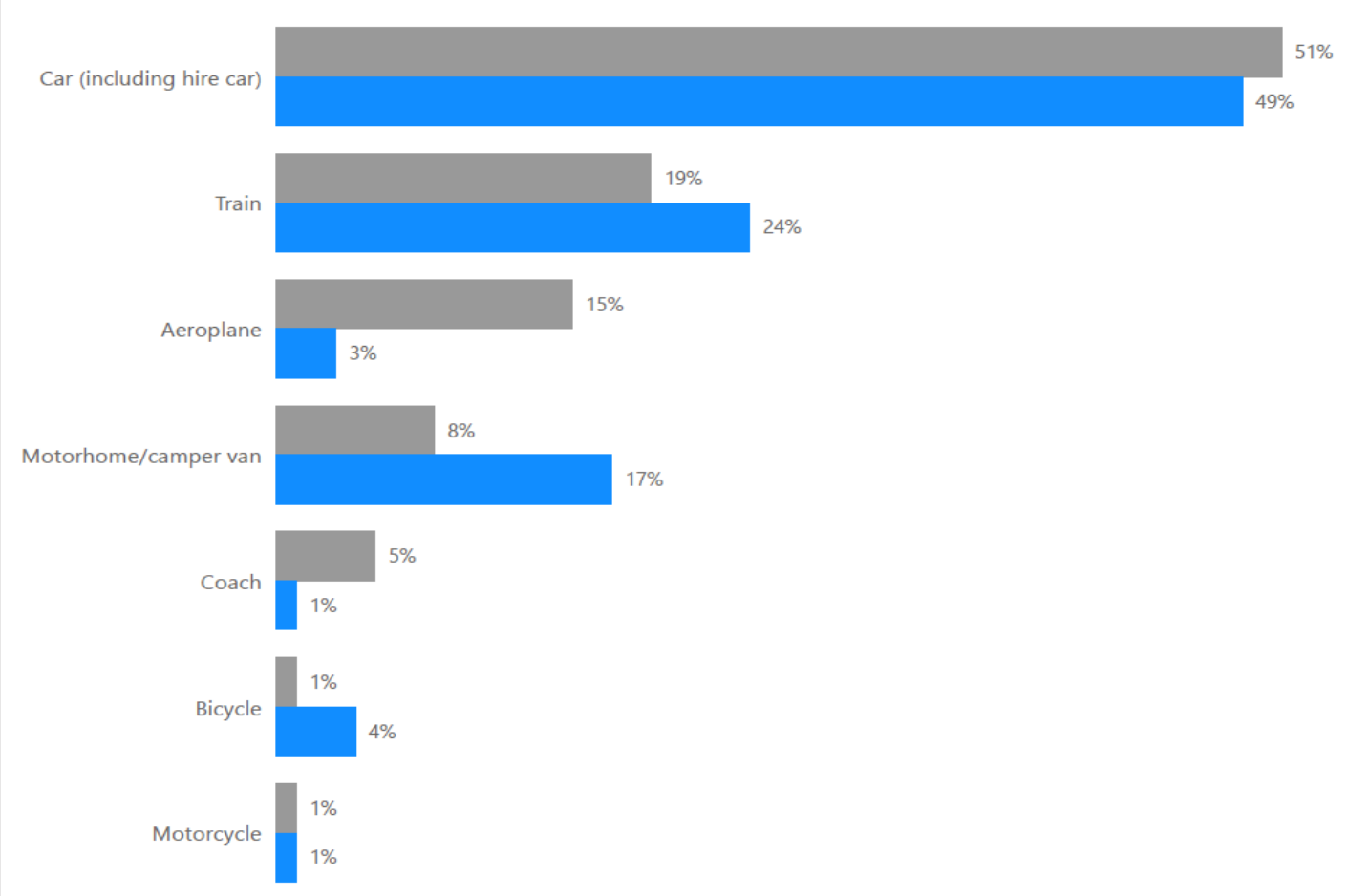
Source: LFT/Ilres Visitor Survey.

Transport, new visitors and cross-border trips

Inbound leisure visitors with overnight, 2023-2024

All inbound
Germany

Mode of transport to access Luxembourg



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

Source: LFT/Ilres Visitor Survey.

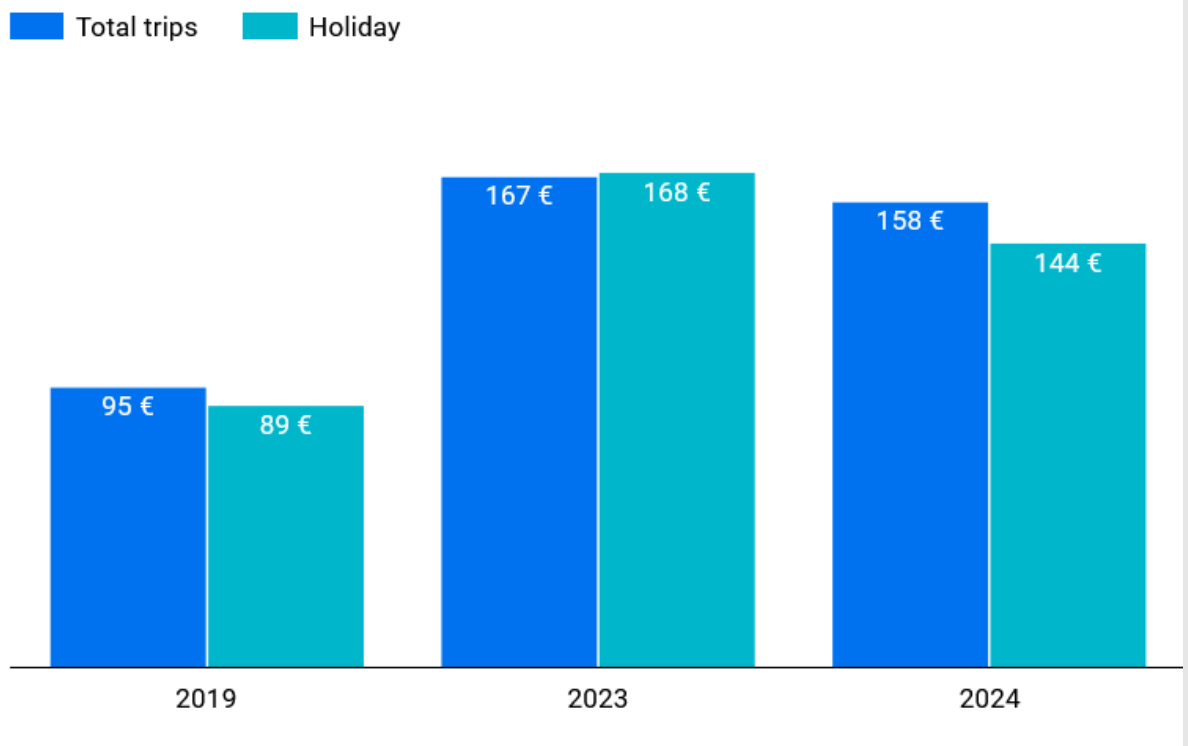
Expenditure

Inbound trips to Luxembourg with overnight (all accommodation)

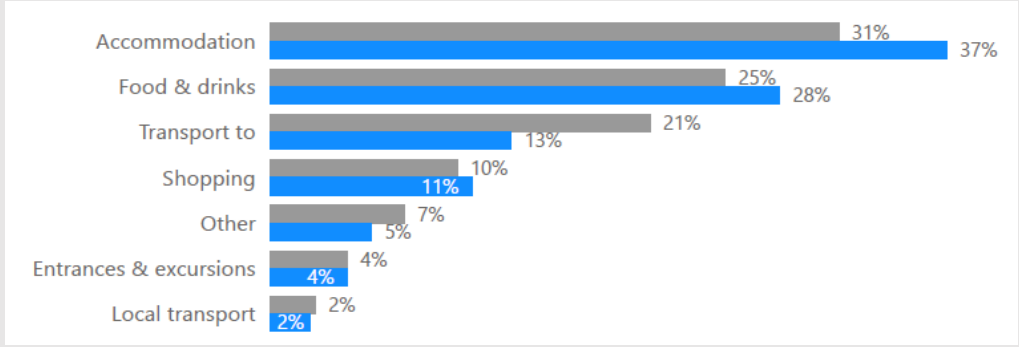
All inbound

Germany

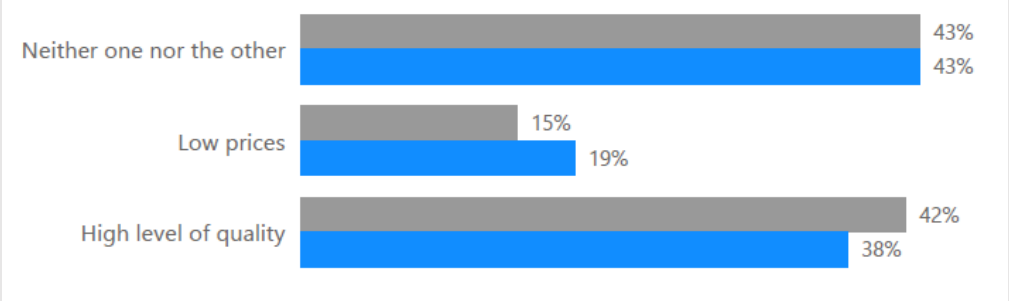
Average expenditure/pers./day



Expenditure of leisure inbound visitors by categories, 2023-2024



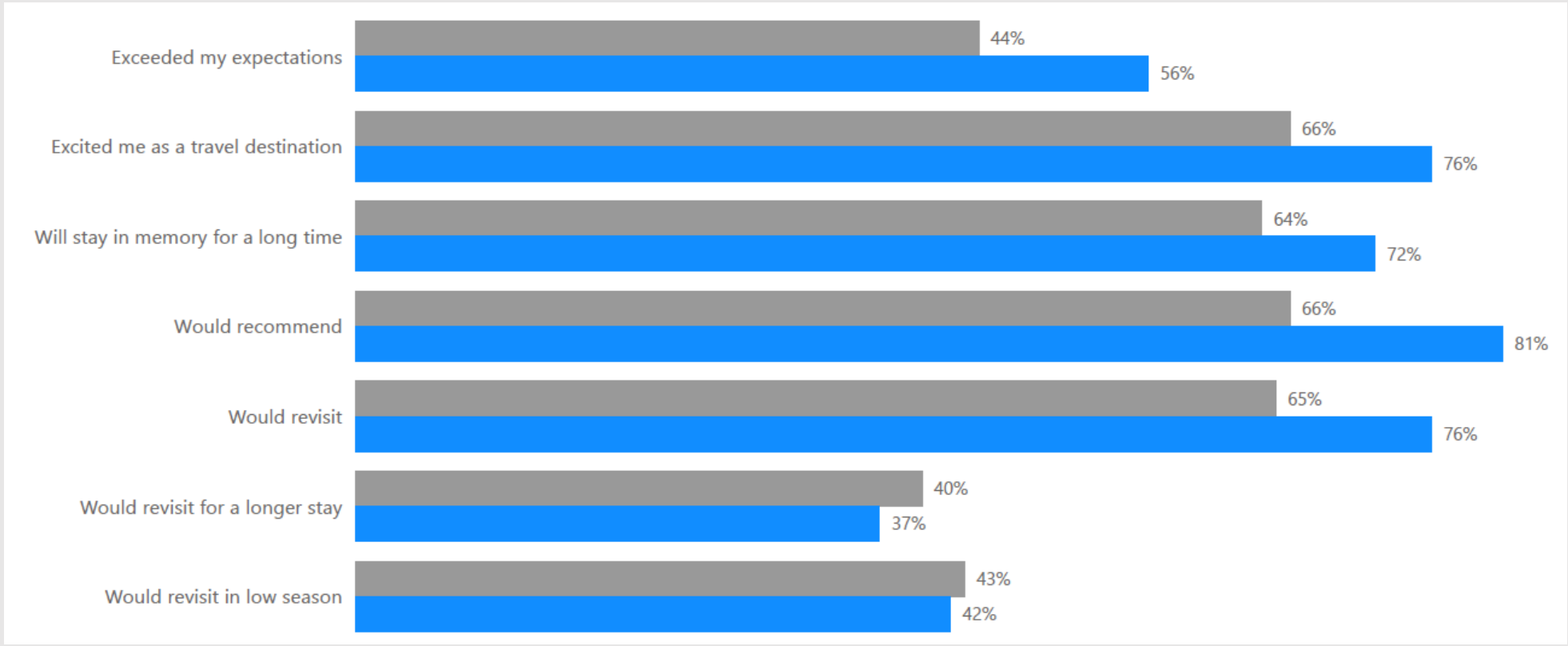
Quality vs. price-orientation of leisure inbound visitors, 2023-2024



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

Visitor satisfaction and recommendation

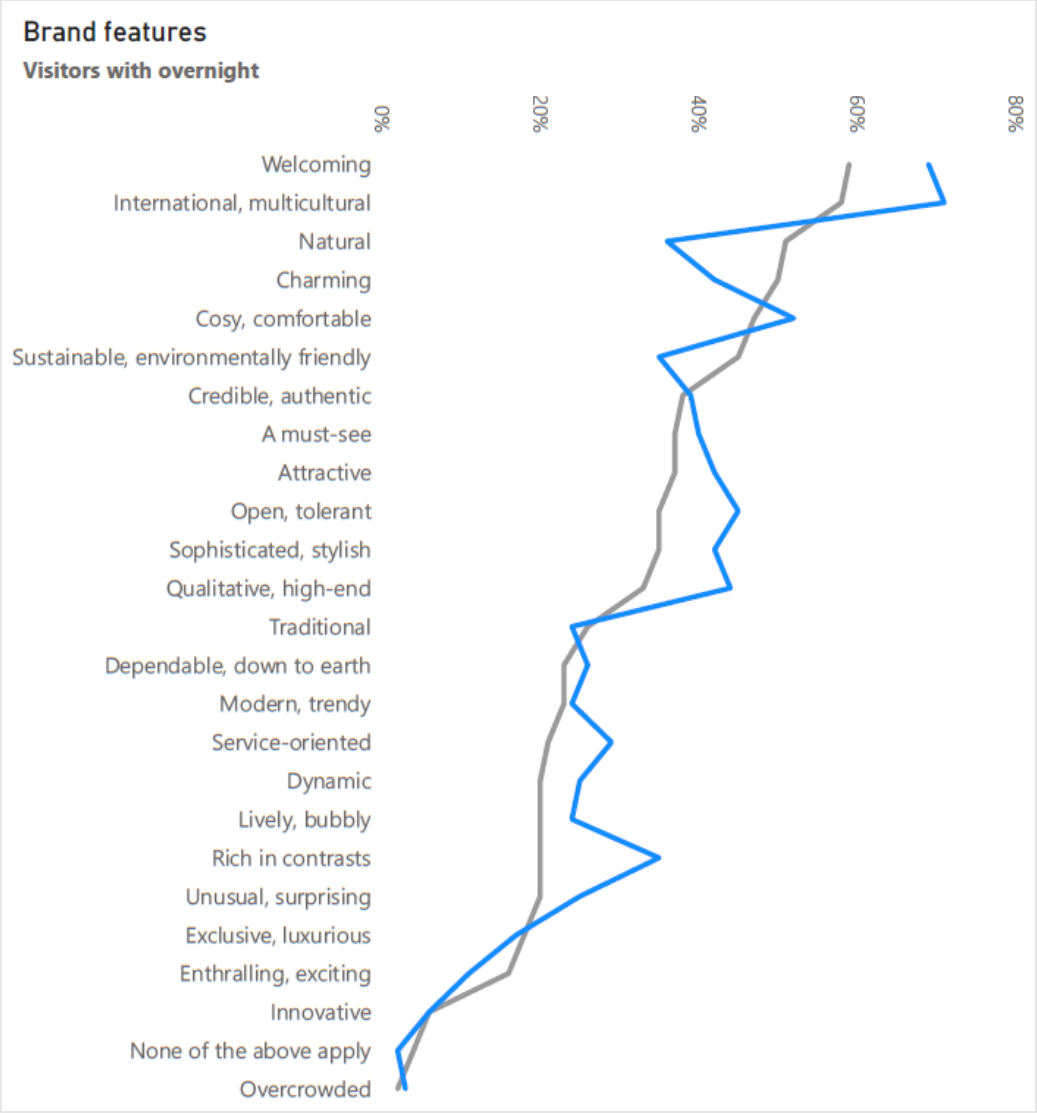
Inbound leisure visitors, 2023-2024



Source: LFT/Ilres Visitor Survey.

Brand features perception

Inbound leisure visitors with overnights, 2023-2024



Target segments,
Brand & Growth Potential

LFT Target Segments

Explorers

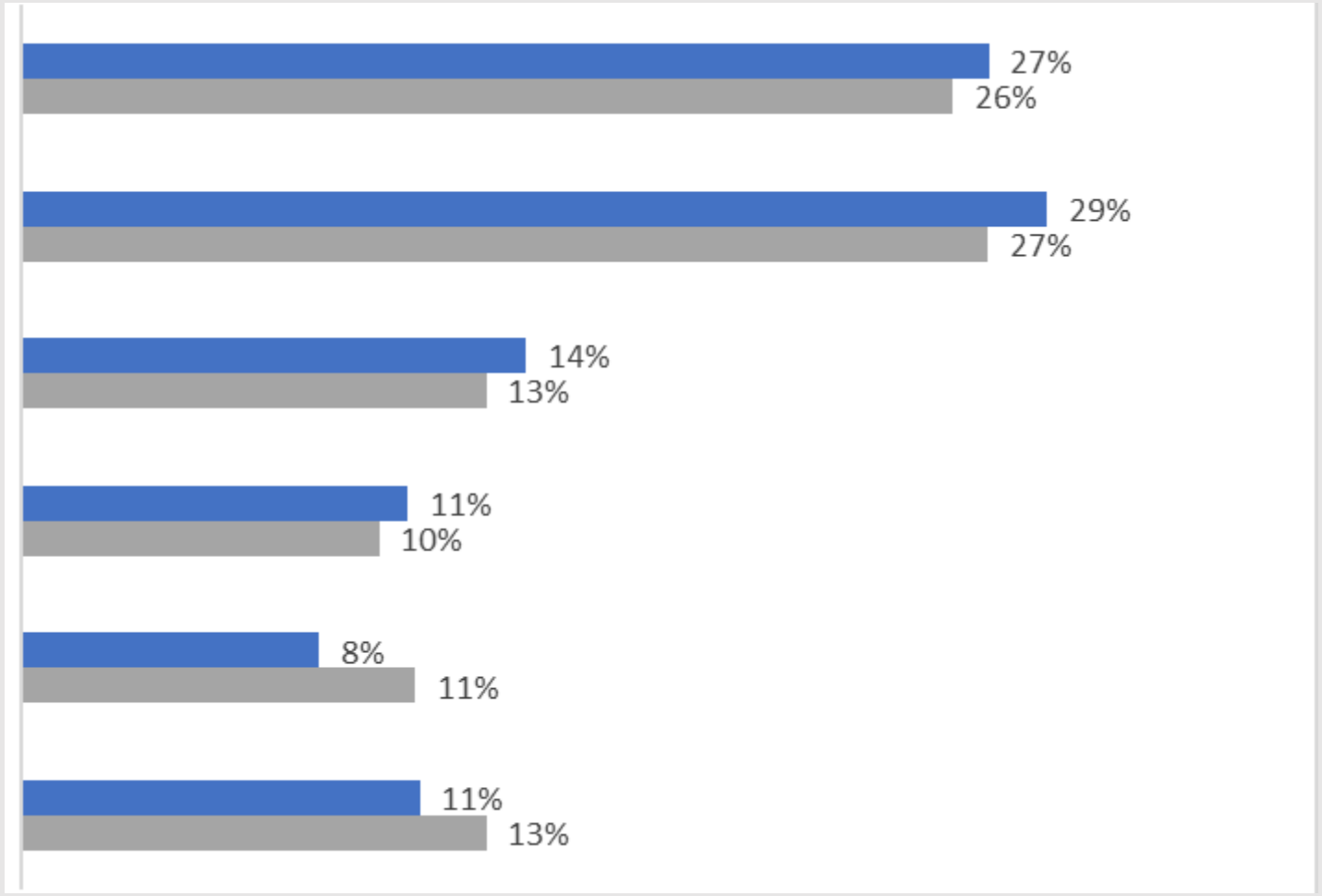
Nature-Loving Actives

Relaxation Seekers

Short Breakers

Perfection Seekers

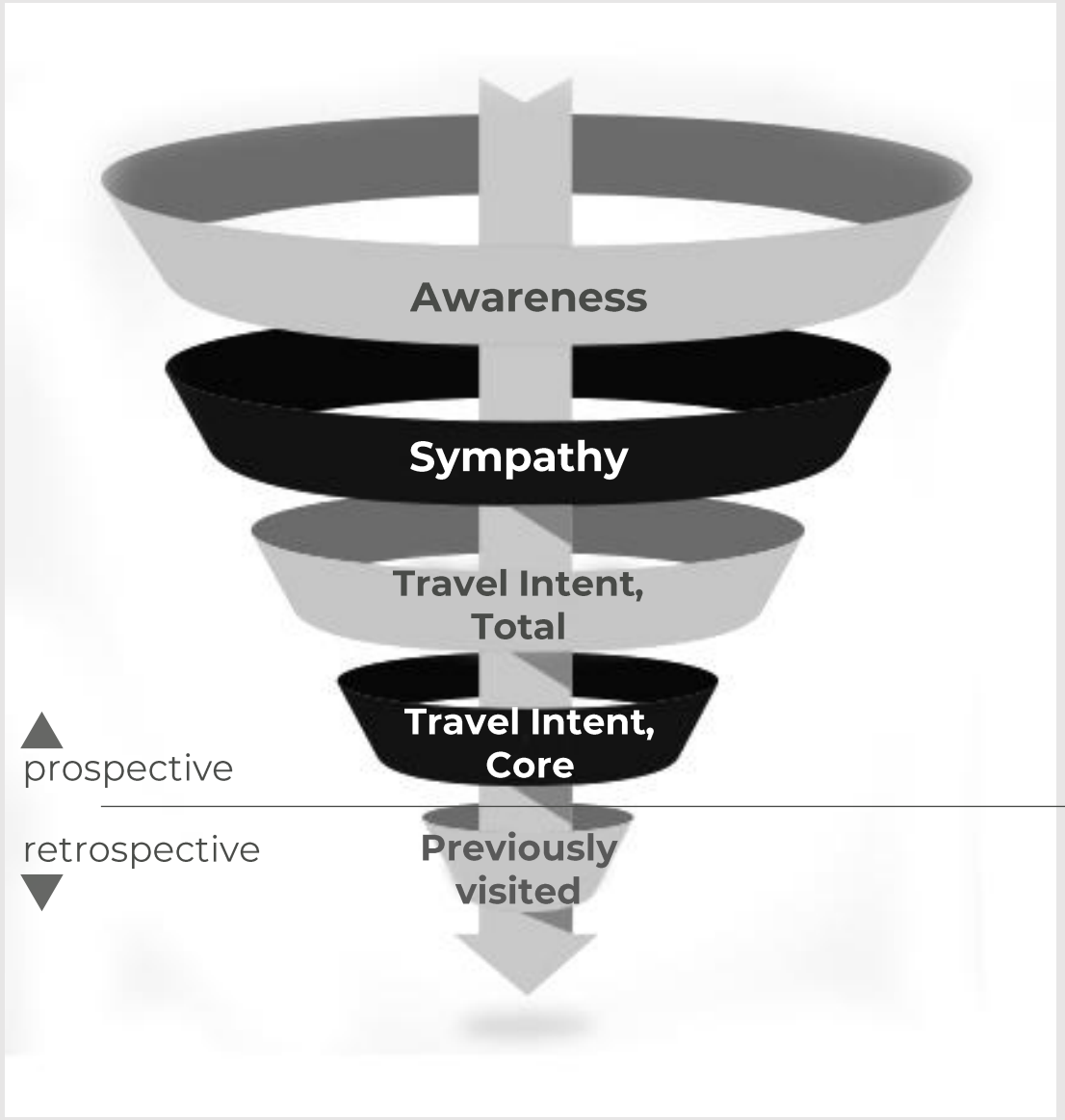
Leisure Oriented



Source: LFT (estimate).

Destination Luxembourg – Brand Funnel 2024

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

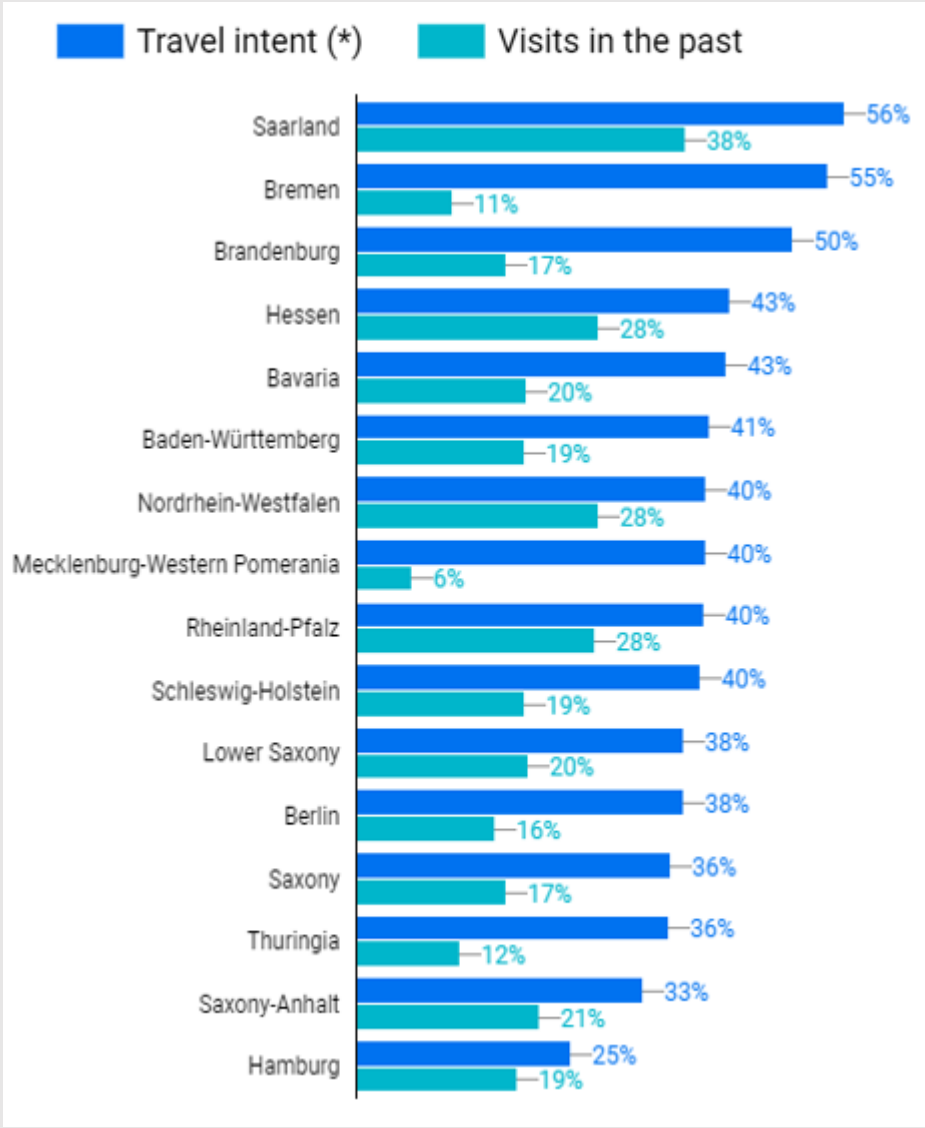


Awareness	80%	83%
	78%	70%
Sympathy	62%	58%
	65%	64%
Travel Intent, Total	40%	37%
	32%	28%
Travel Intent, Core	20%	16%
Previously visited	18%	19%

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**	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).

Source: LFT Brand & Potential Study, 2024.

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.

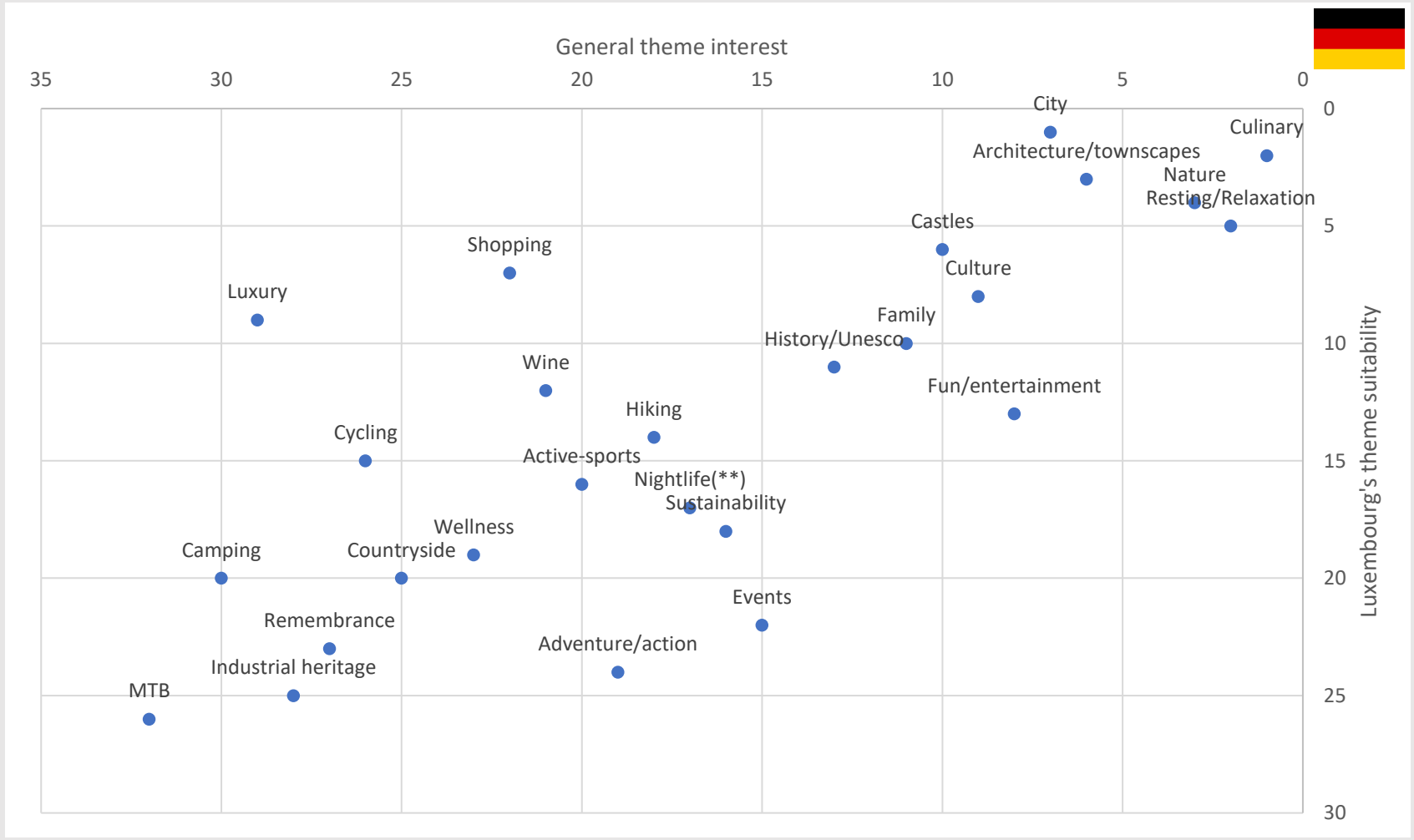
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

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

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
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

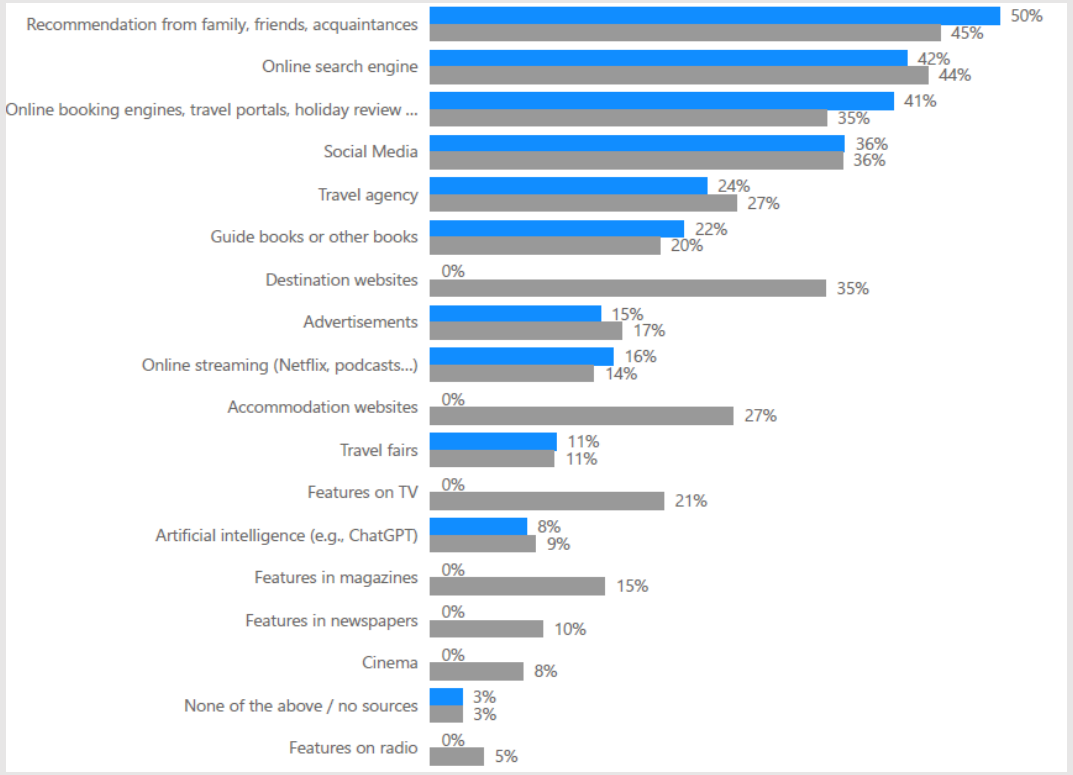
Source: LFT Brand & Potential Study., 2024

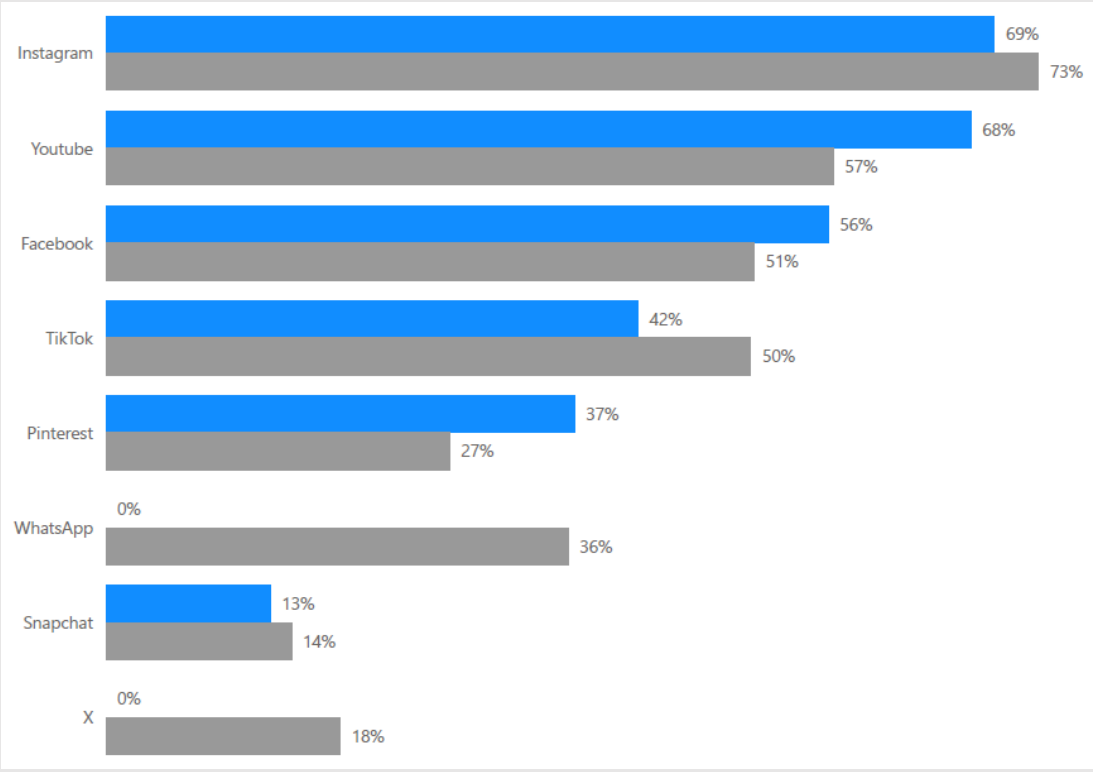
Trip organisation and preferences (1)

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

Germany
All inbound

Preferred sources of travel inspiration





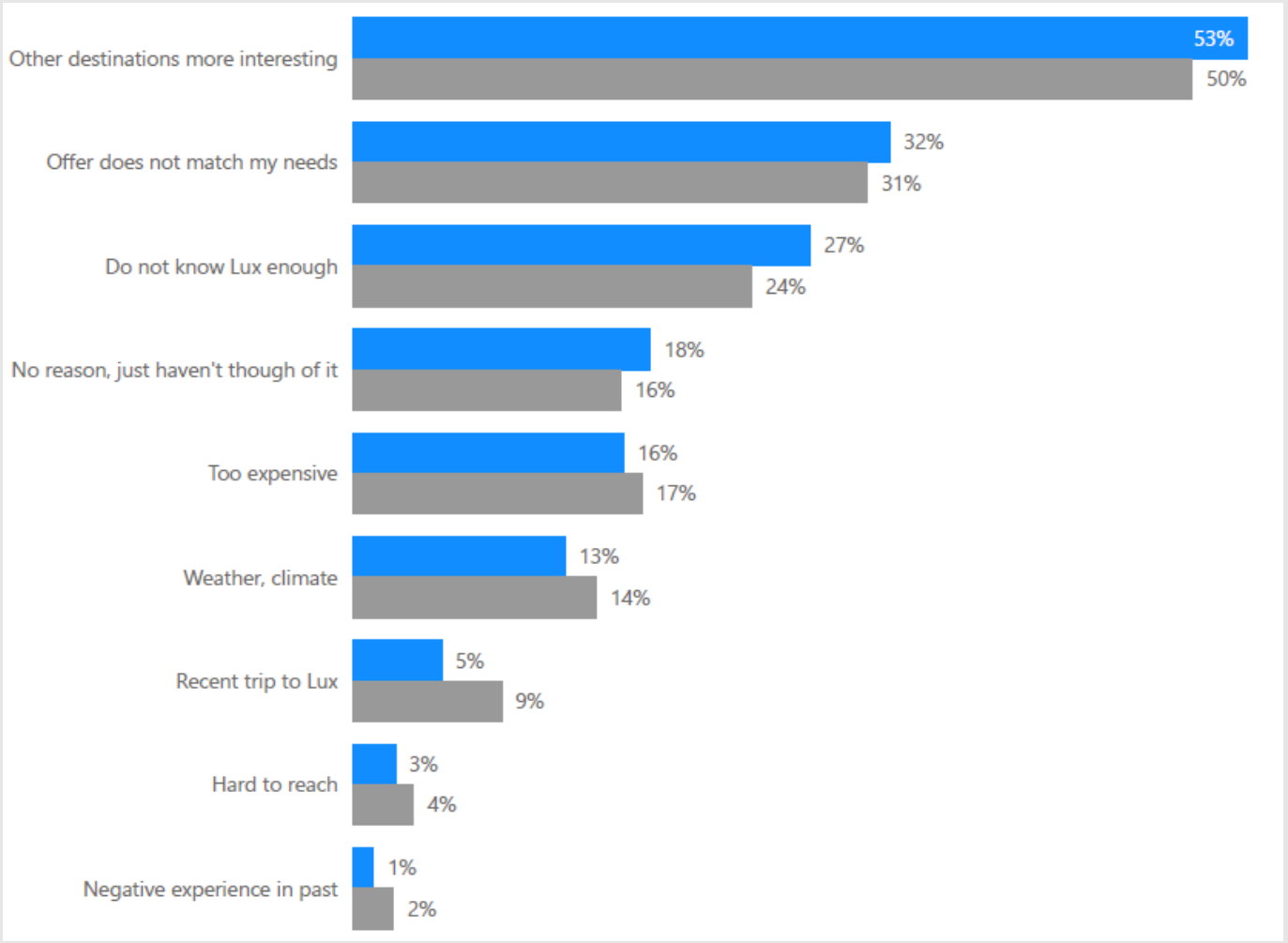
Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent to Luxembourg)

Source: LFT Brand & Potential Study, 2024.

Trip organisation and preferences (2)

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

Reasons for not considering Luxembourg as a destination

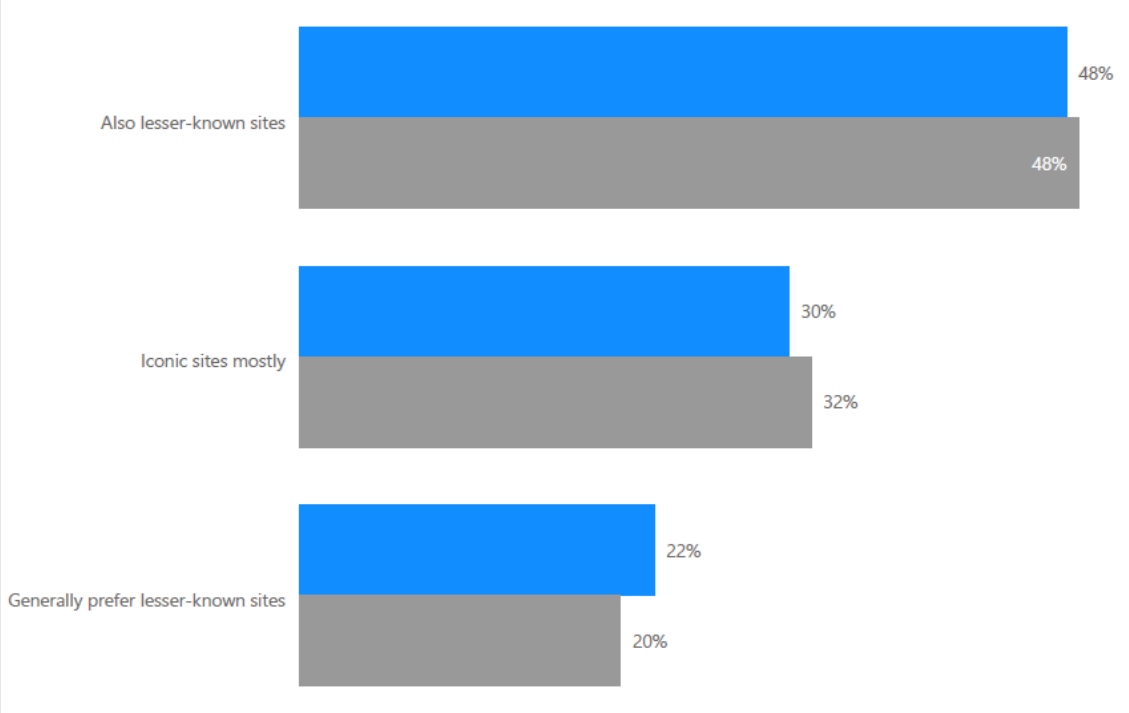


Source: LFT Brand & Potential Study, 2024.

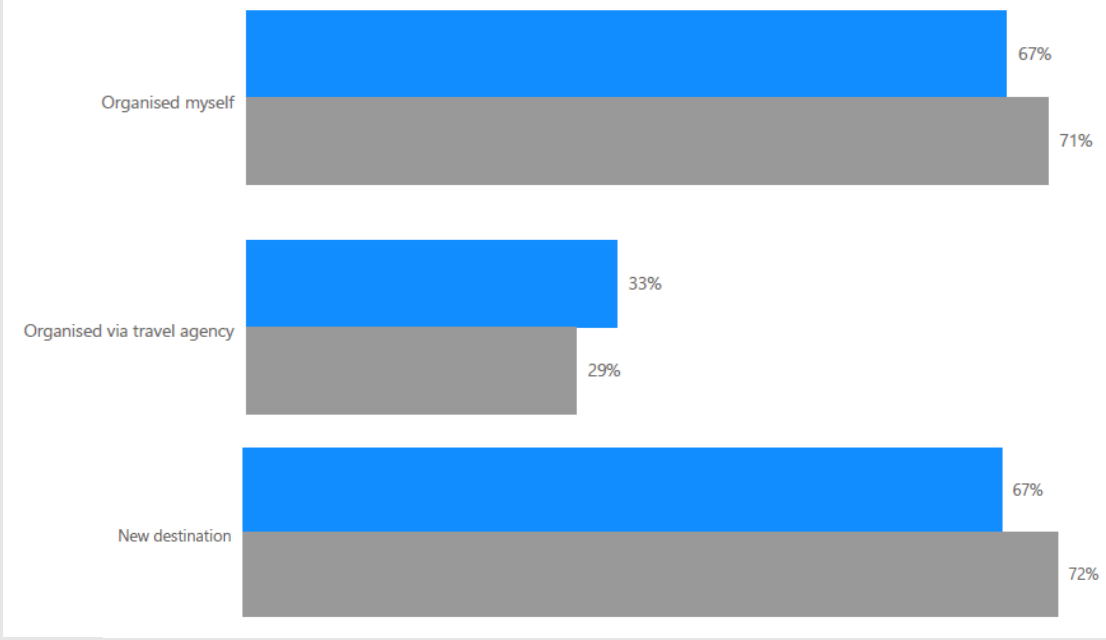
Trip organisation and preference (3)

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