



Luxembourg for Tourism

Market profile

FRANCE

2023



Economic indicators & General Travel Demand

Economic indicators - General travel demand

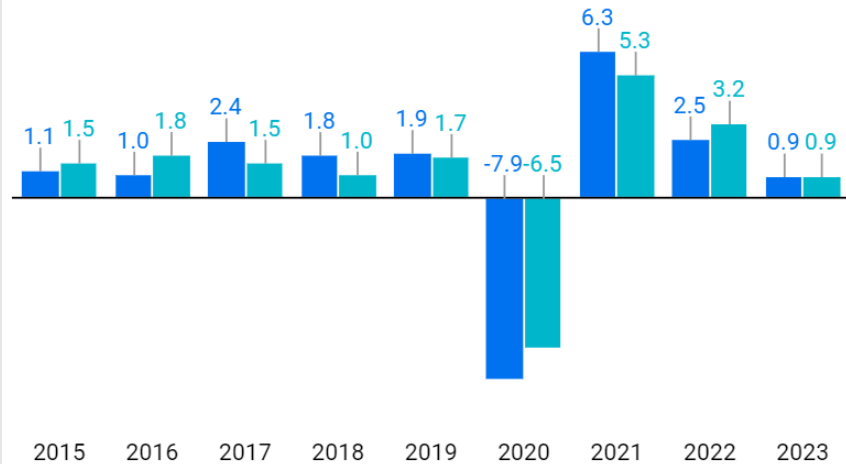


Economy & population

GDP (\$) per capita: **46,001**
 Unemployment (%): **7.4**
 Population (mn): **65.9**
 Inflation (%): **5.7**

GDP and Consumer spending, % annual change

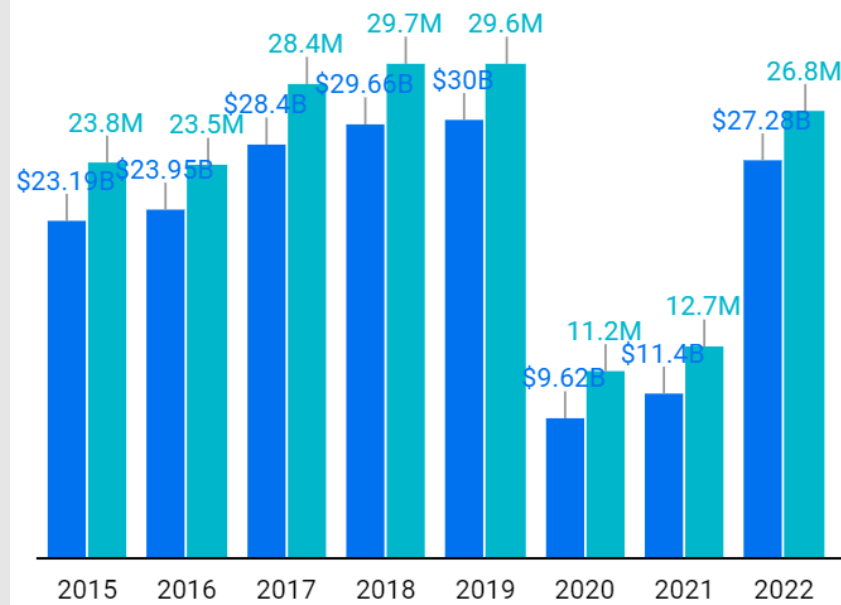
■ GDP change ■ Consumer spend



Share of short trips (1-3 nights),
 % all outbound trips (2022)
33.2%

Outbound trips and travel expenditure

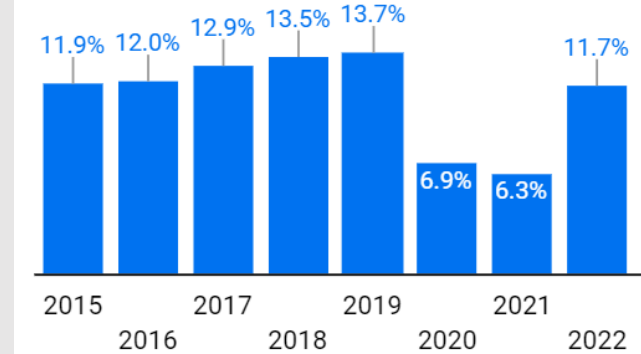
■ Outbound travel expenditure ■ Outbound trips



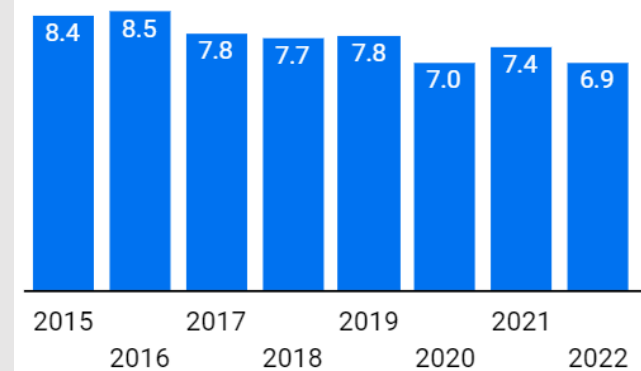
Average spend
 per outbound trip (2019)
1.013 \$

Outbound travel intensity
0.46 trips
 per inhabitant (2019)

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of leisure,
 % all outbound trips (2022)
87.1%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2023

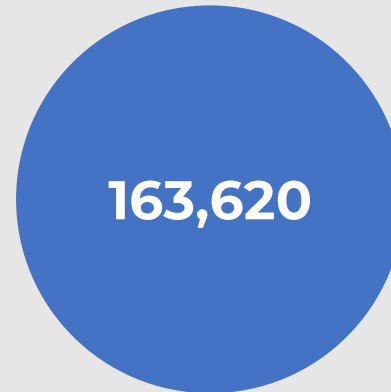


**Nights,
paid accommodation, 2023**



-1% (vs. 2022)
-6% (vs. 2019)

**Arrivals,
paid accommodation, 2023**



+5% (vs. 2022)
-7% (vs. 2019)

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



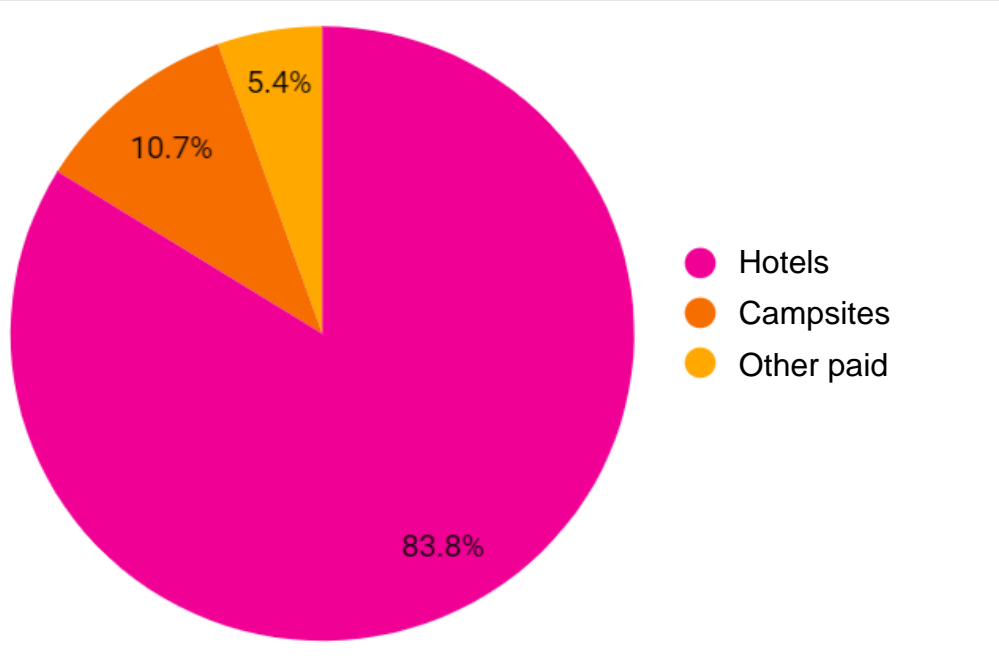
-0.09 days (vs. 2022)
+0.01 days (vs. 2019)

Nights & arrivals in paid accommodation

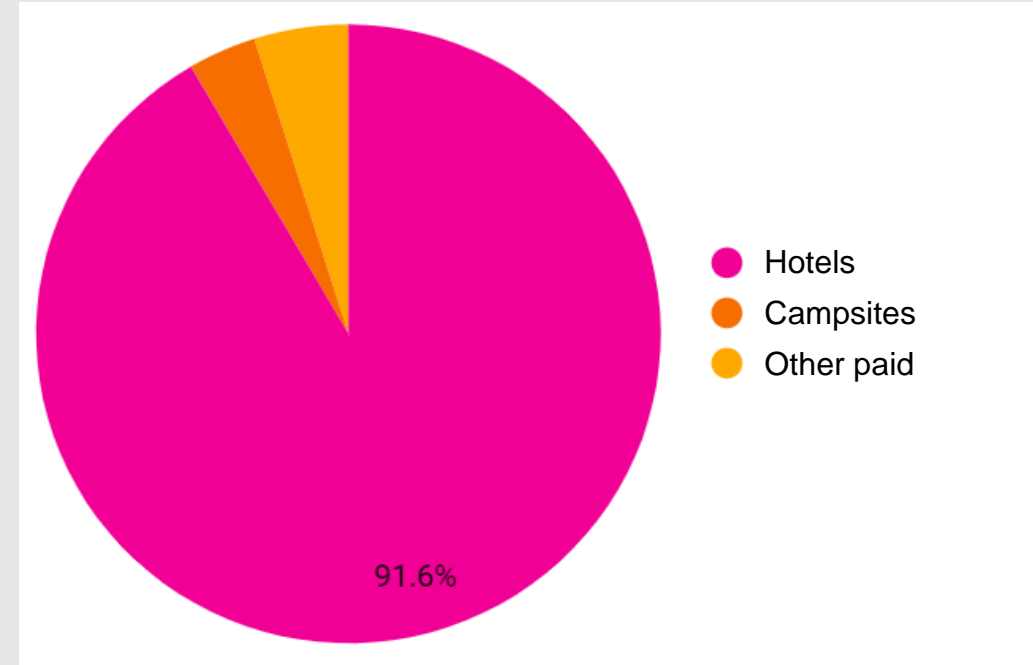
Type of accommodation, 2023



**Nights,
paid accommodation, 2023**



**Arrivals,
paid accommodation, 2023**



Hotels	245.294	+1% (vs. 2022) -7% (vs. 2019)
Campsites	31.351	-4% (vs. 2022) +18% (vs. 2019)
Other paid accomm.	15.896	-11% (vs. 2022) -25% (vs. 2019)

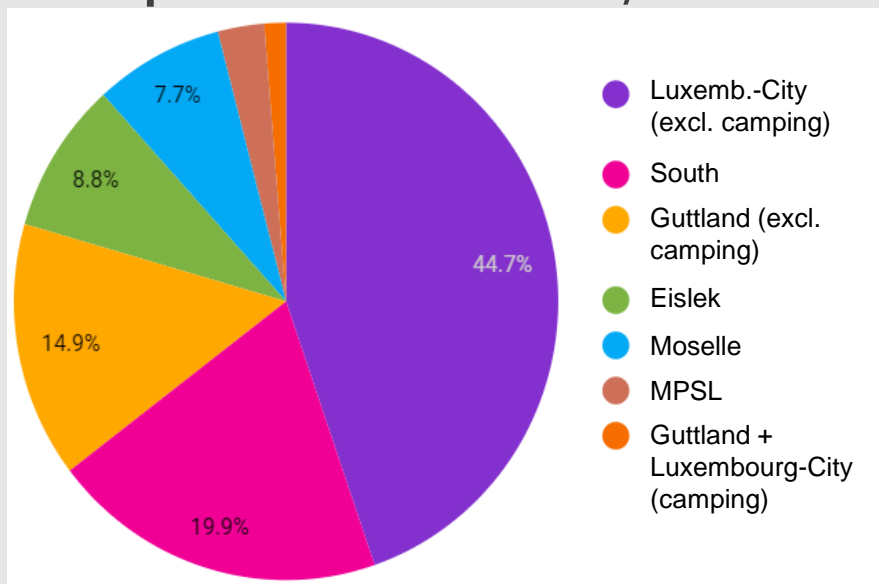
Hotels	149.881	+6% (vs. 2022) -6% (vs. 2019)
Other paid accomm.	7.978	-1% (vs. 2022) -22% (vs. 2019)
Campsites	5.761	-1% (vs. 2022) -1% (vs. 2019)

Nights & arrivals in paid accommodation

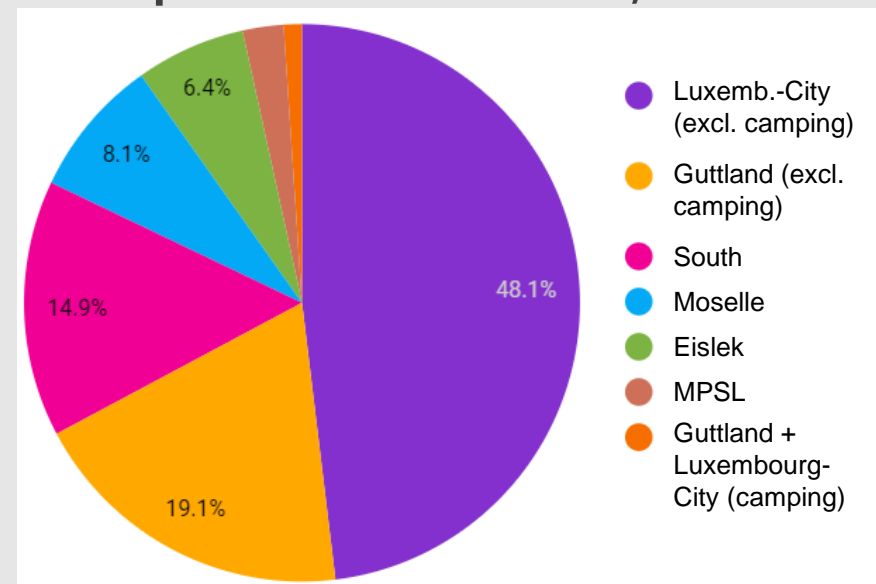
Regions, 2023



Nights, paid accommodation, 2023



Arrivals, paid accommodation, 2023



Lux.-City (excl. camping)	130.834	+2% (vs. 2022) -16% (vs. 2019)
South	58.196	-4% (vs. 2022) +22% (vs. 2019)
Guttland (excl. camping)	43.473	+7% (vs. 2022) +9% (vs. 2019)
Eislek	25.757	-8% (vs. 2022) +4% (vs. 2019)
Moselle	22.451	+6% (vs. 2022) -21% (vs. 2019)
MPSL	8.074	-11% (vs. 2022) -34% (vs. 2019)
Guttland/Lux.-City (camping)	3.756	-13% (vs. 2022) +7% (vs. 2019)

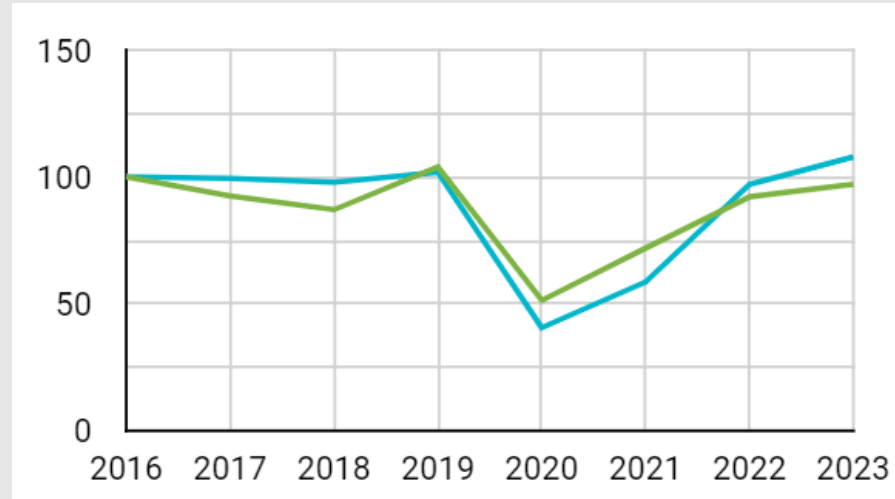
Lux.-City (excl. camping)	78.664	+3% (vs. 2022) -15% (vs. 2019)
Guttland (excl. camping)	31.310	+17% (vs. 2022) +29% (vs. 2019)
South	24.346	+3% (vs. 2022) +6% (vs. 2019)
Moselle	13.231	+6% (vs. 2022) -14% (vs. 2019)
Eislek	10.440	+7% (vs. 2022) -22% (vs. 2019)
MPSL	3.900	-3% (vs. 2022) -29% (vs. 2019)
Guttland/Lux.-City (camping)	1.729	-3% (vs. 2022) +6% (vs. 2019)

Arrivals in paid accommodation

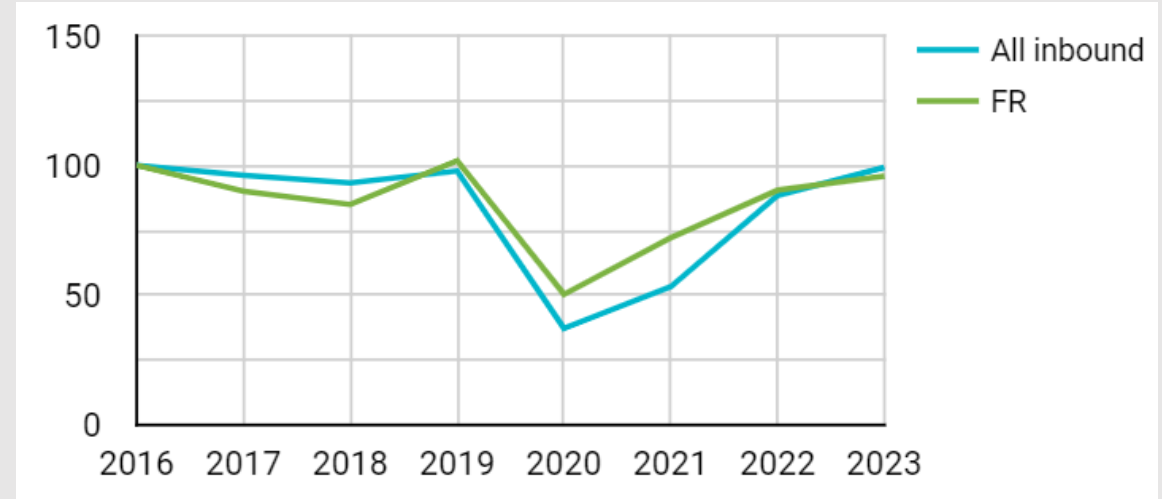
Trends 2016-2023



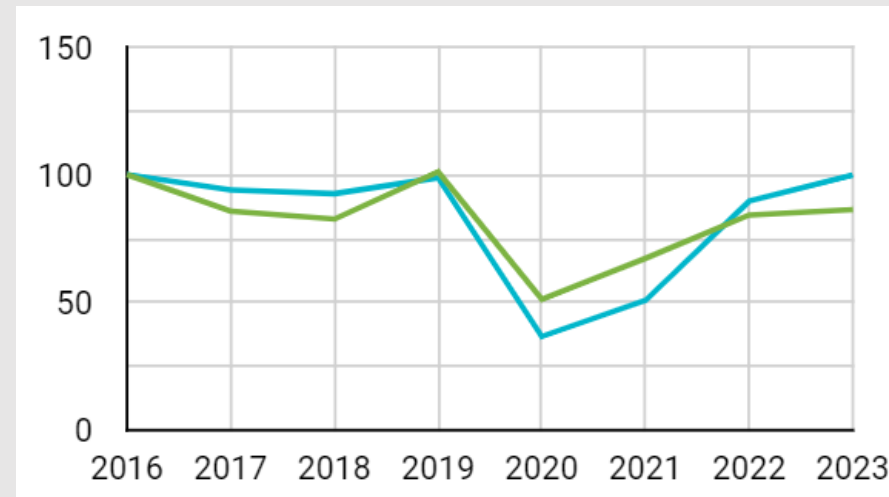
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



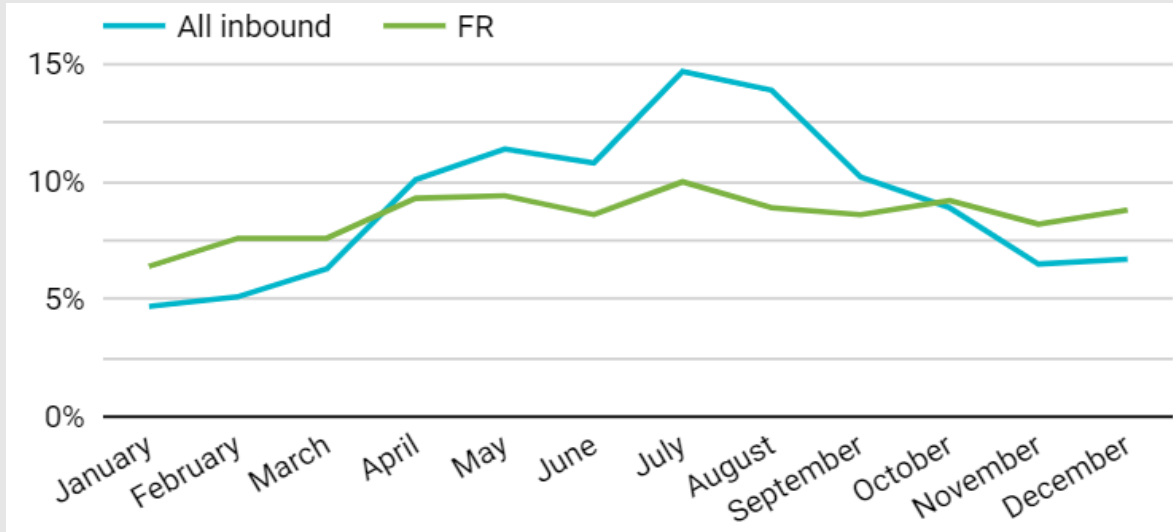
(*) excluding camping.
Source: Statec

Arrivals in paid accommodation

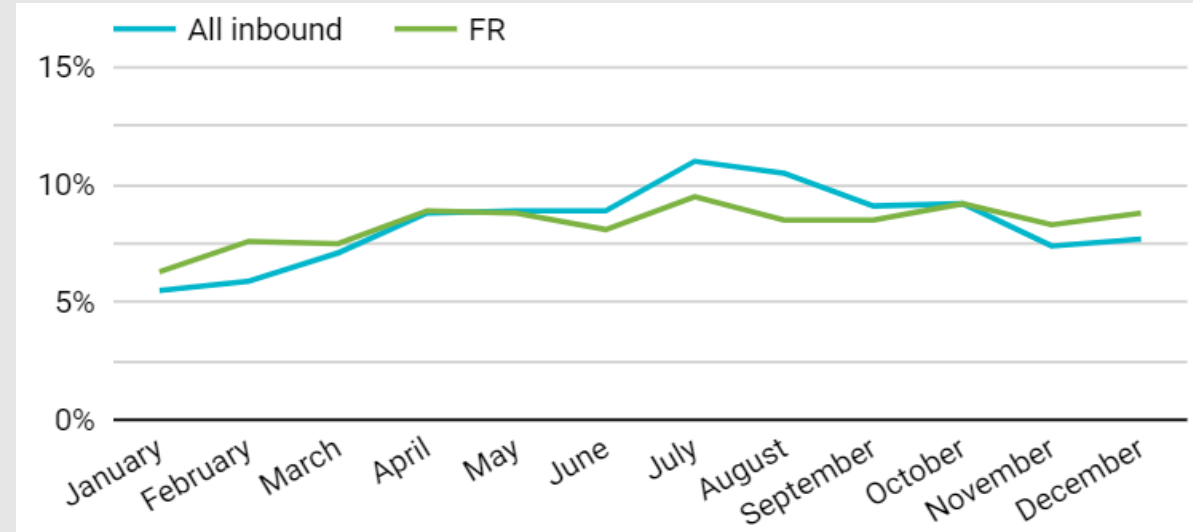
Seasonality



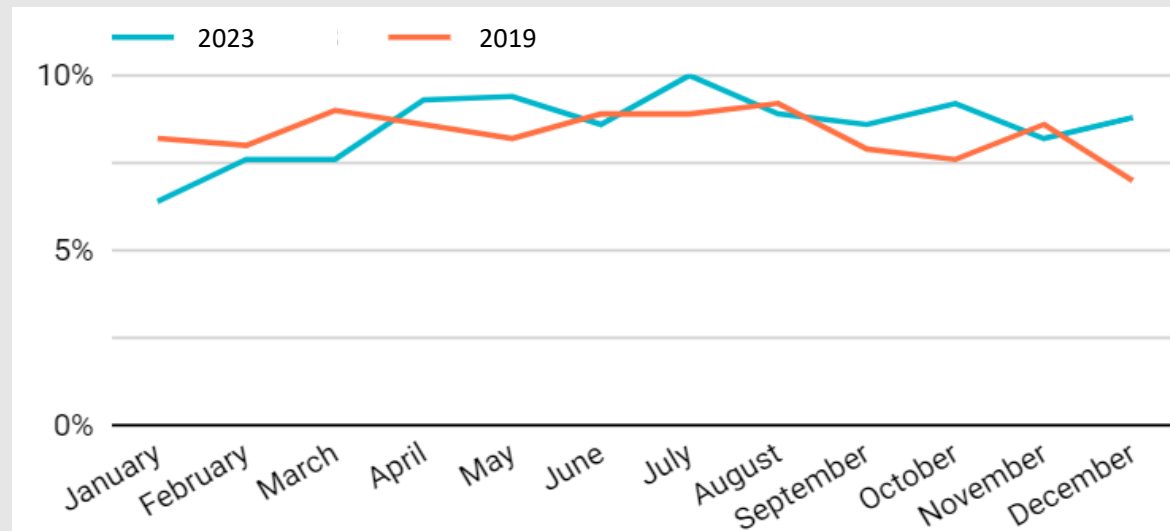
All paid accommodation, 2023



Hotels, 2023



All paid accommodation, arrivals from France



Short-term rentals

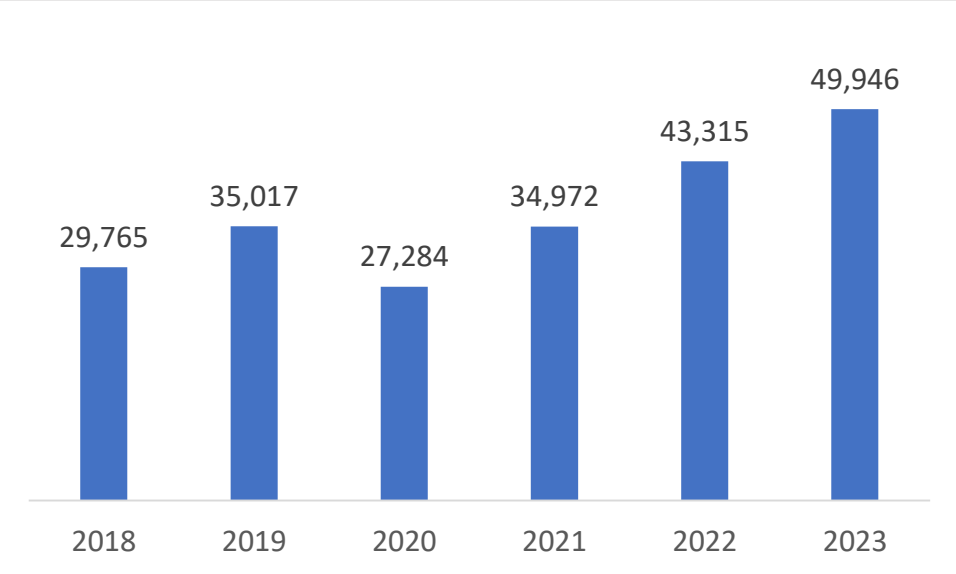


**Nights,
Short-term rentals, 2023**



+15% (vs. 2022)
+43% (vs. 2019)

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





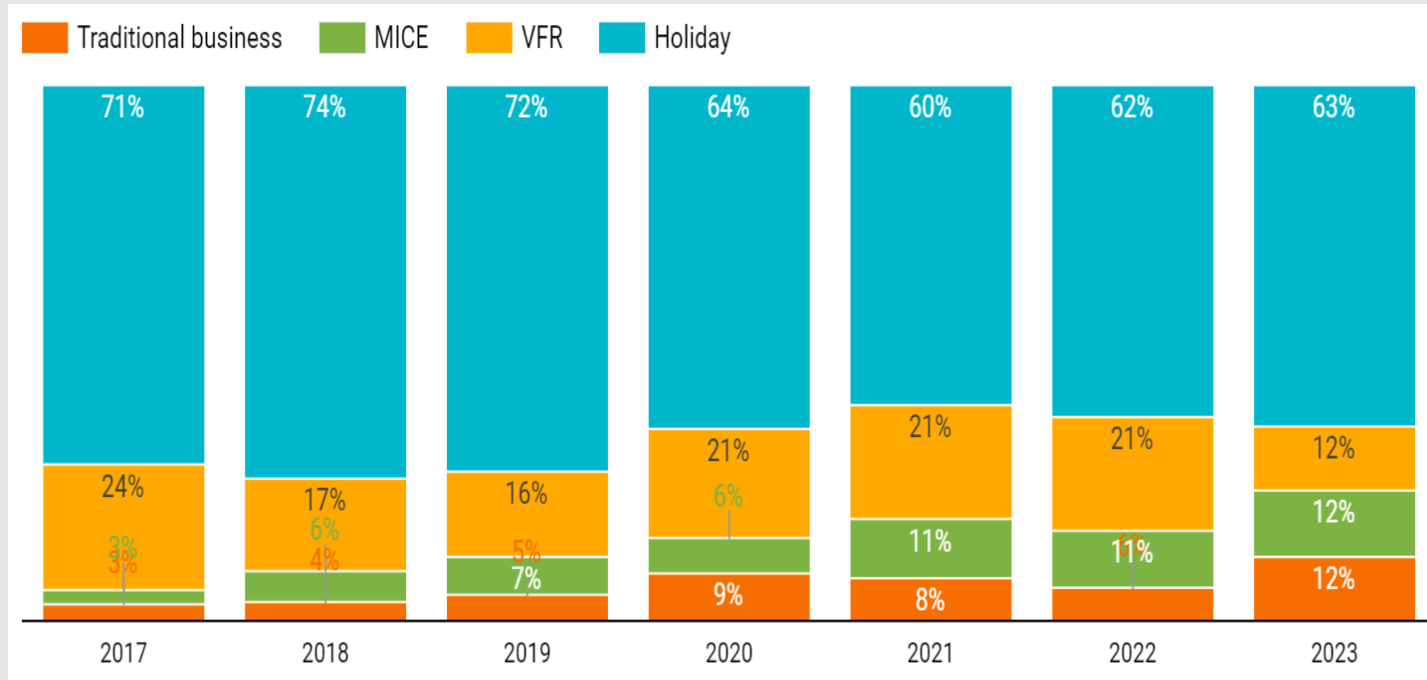
Characteristics of French inbound trips to Luxembourg

French trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2017-2023

French trips to Luxembourg, 2017-2023



2023

France to Luxembourg Europe to Luxembourg

Holiday	63%	62%
VFR	12%	15%
MICE	12%	14%
Traditional Business	12%	9%



Travel behaviour of French leisure visitors in Luxembourg

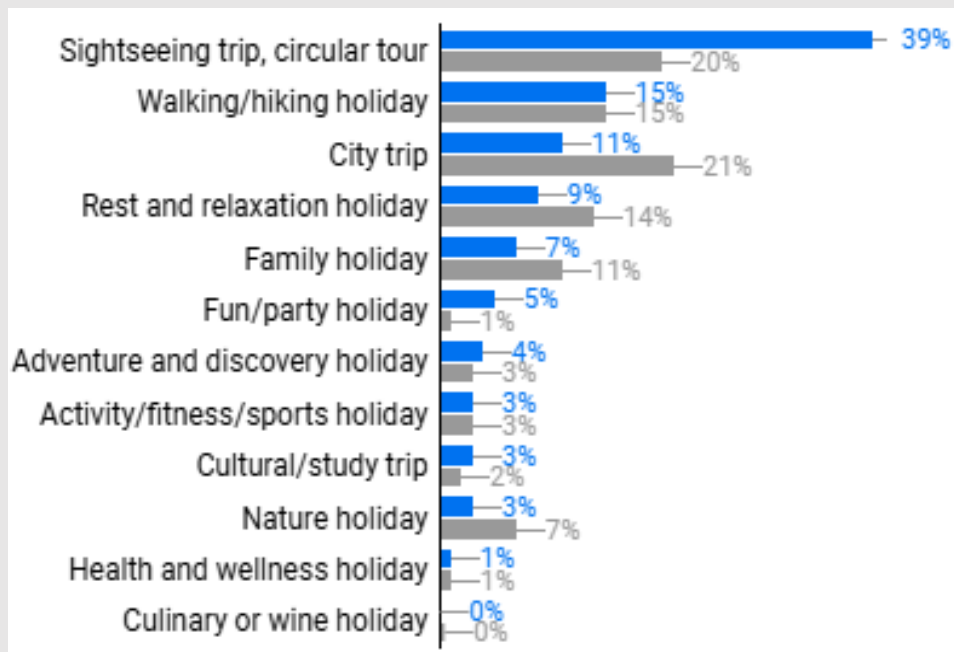
Holiday types

Inbound leisure visitors with overnight, 2023

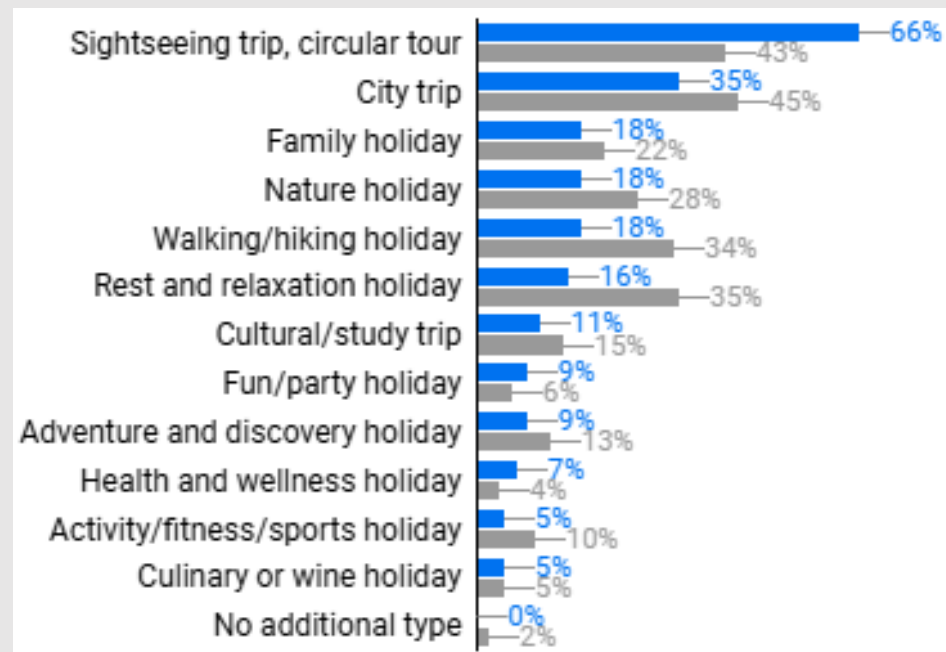


France All inbound

Main holiday types

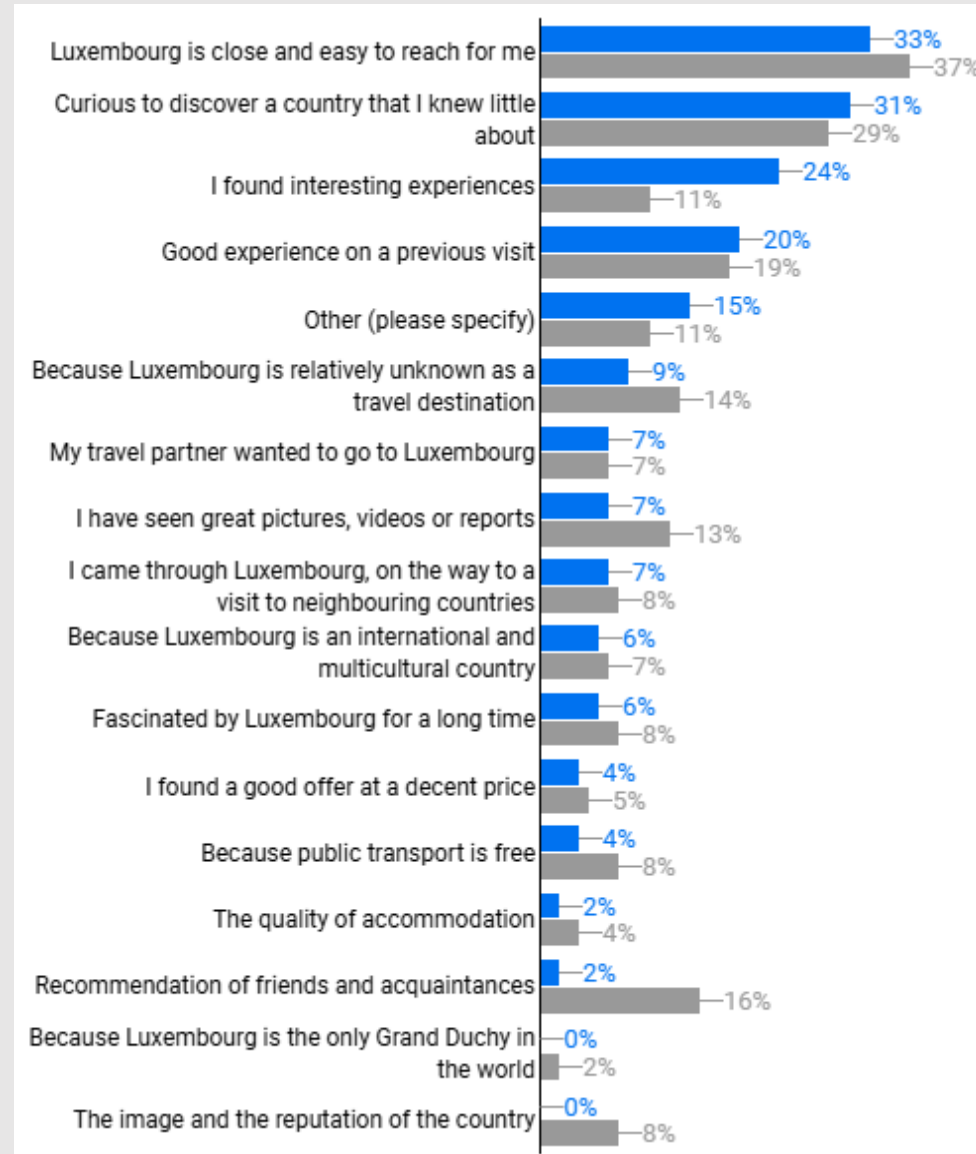
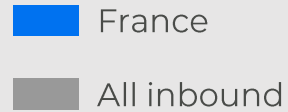


Additional holiday types



Key decision criteria for choosing Luxembourg

Inbound leisure visitors with overnight (*), 2023



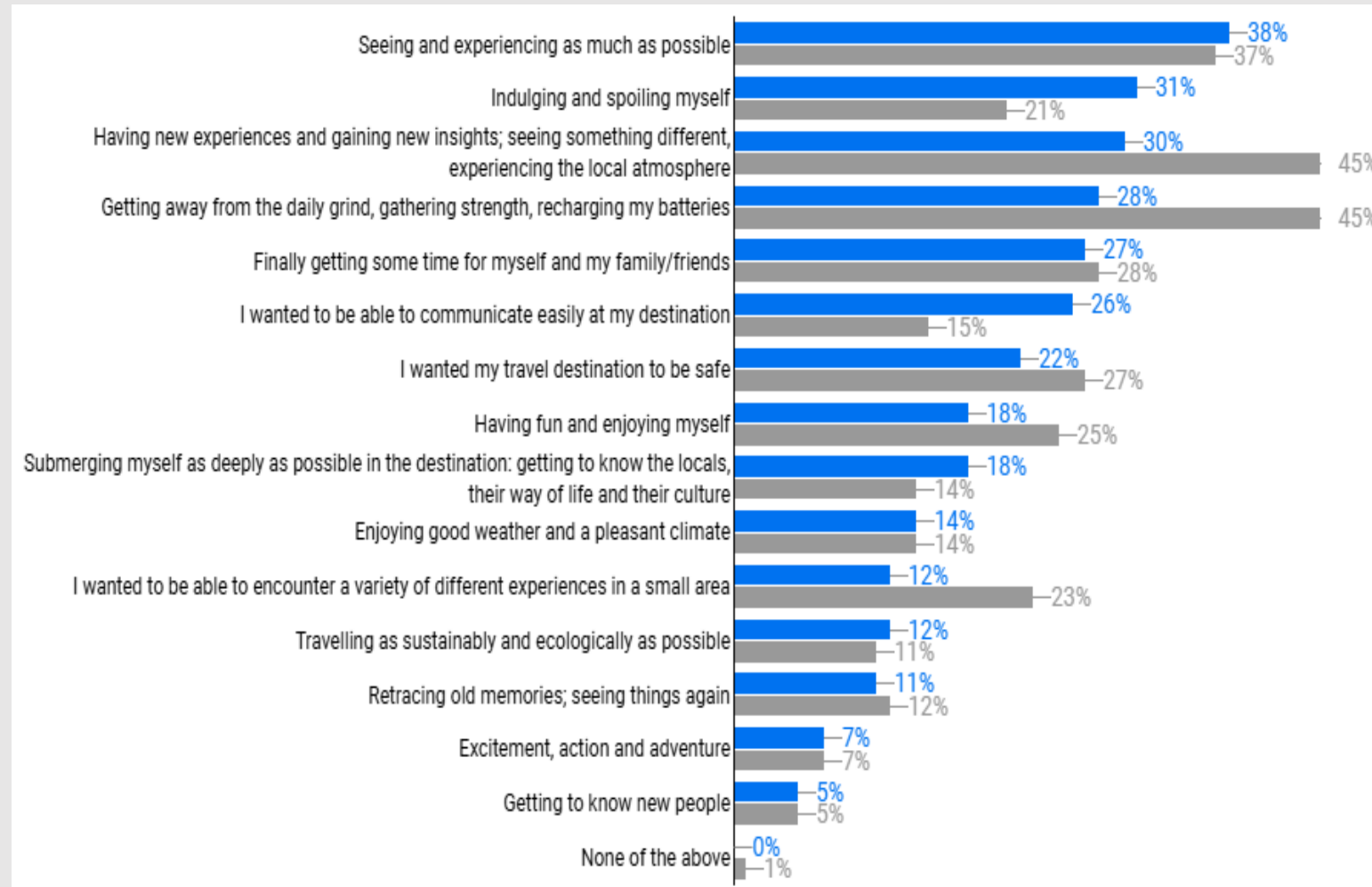
Key travel motivations

Inbound leisure visitors with overnight, 2023



France

All inbound

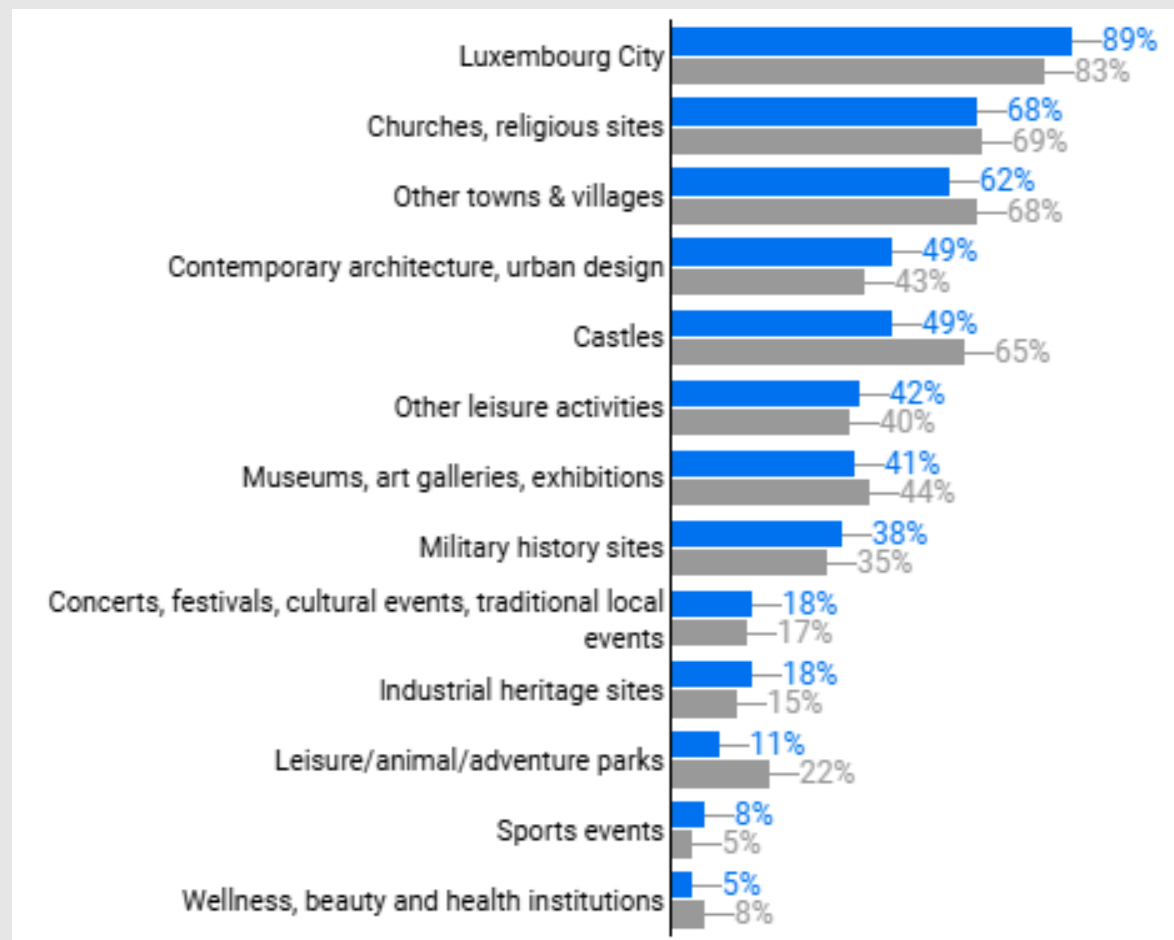


Type of places visited in Luxembourg

Inbound leisure visitors with overnight, 2023



■ France ■ All inbound

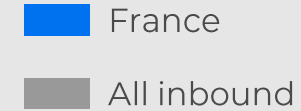
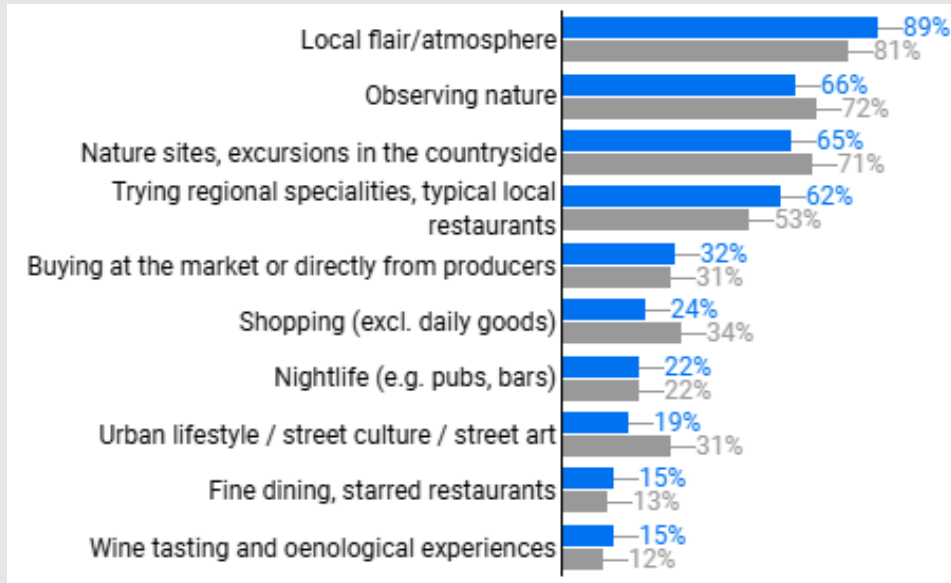


Activities undertaken in Luxembourg

Inbound leisure visitors with overnight, 2023



Non-sporting activities



Sporting activities



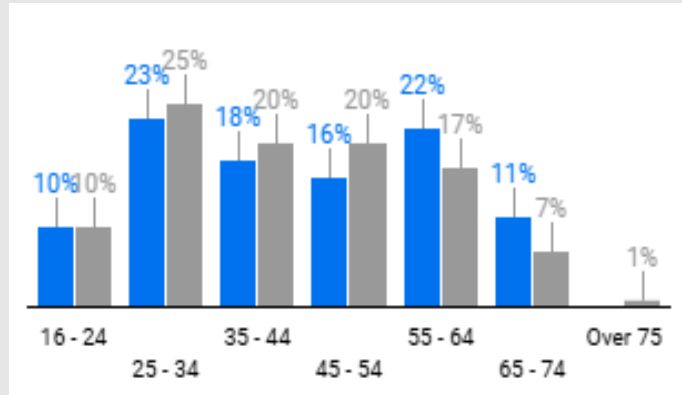
Transport, travel party, age, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2023

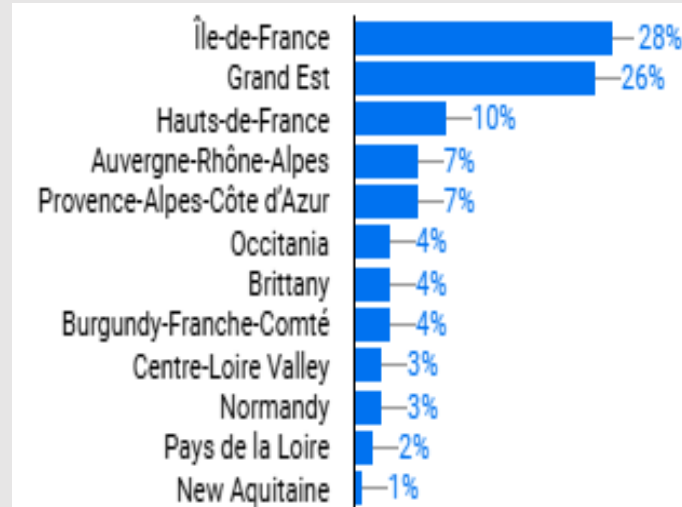


France (blue square) All inbound (grey square)

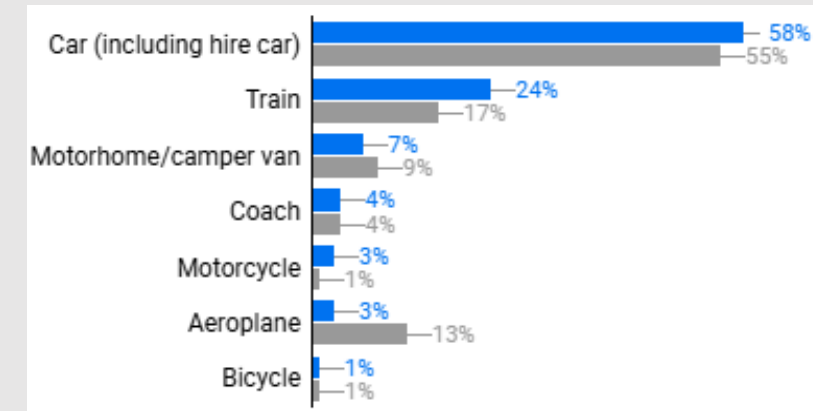
Age groups



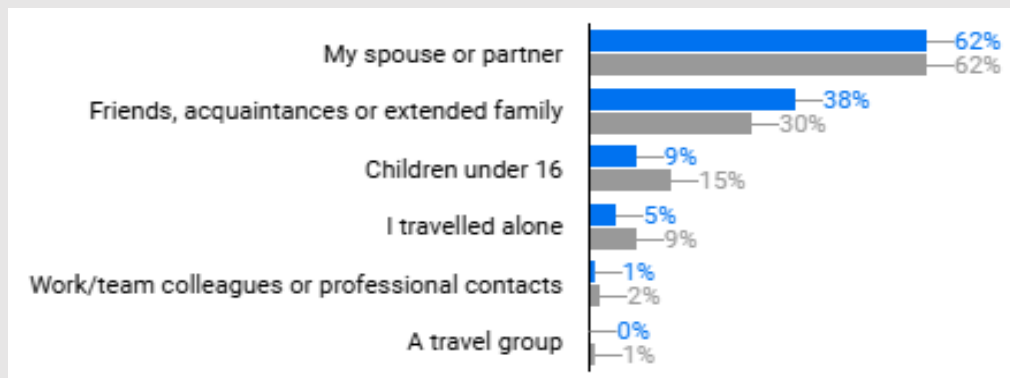
Region of origin



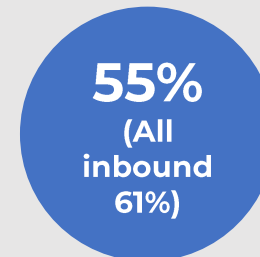
Mode of transport to access Luxembourg



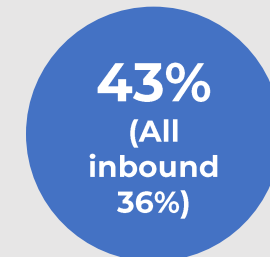
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

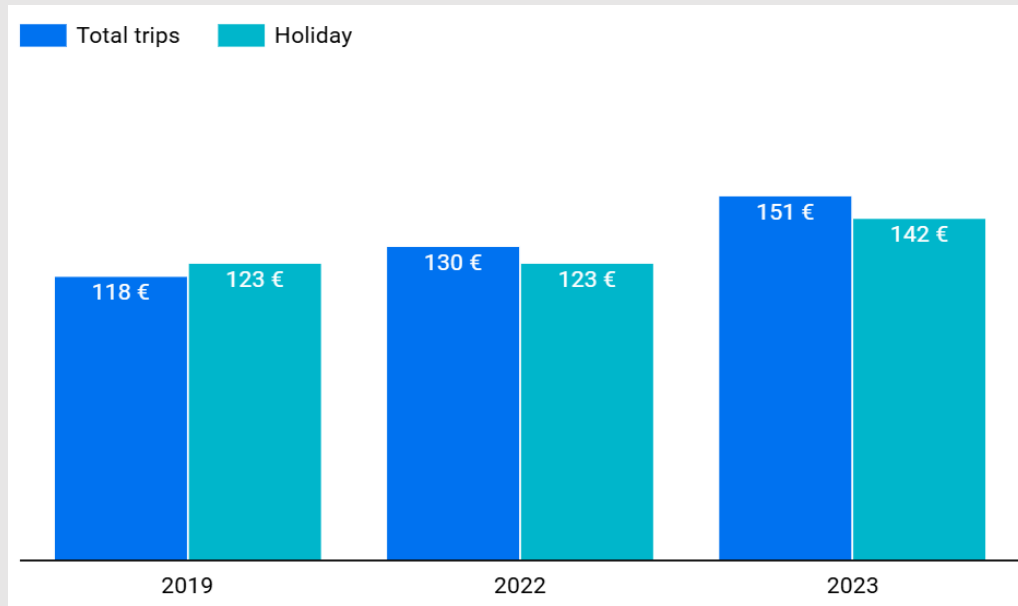


Expenditure

Inbound trips to Luxembourg with overnight



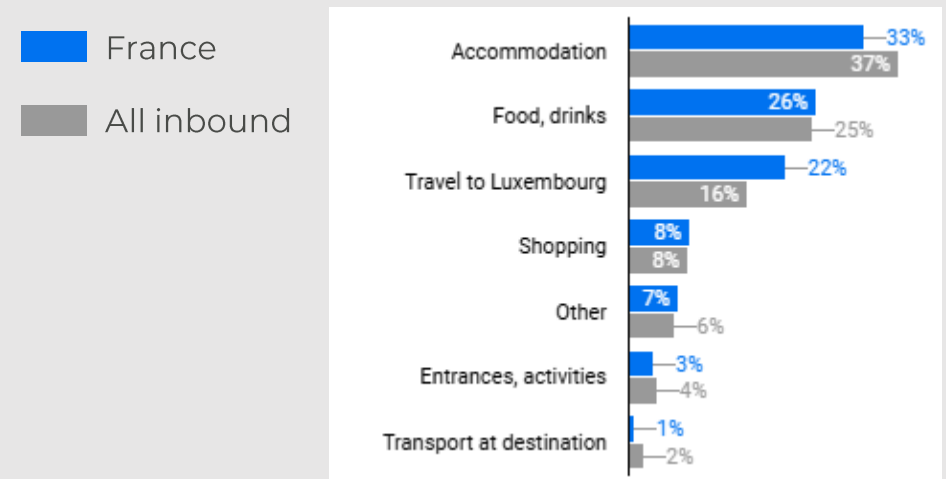
French trips to Luxembourg : average spend per pers. per day



2023

	France to Luxembourg	Europe to Luxembourg
Spend/day/pers. on all trips	151 €	152 €
Spend/day/pers. on holiday trips	142 €	144 €

Expenditure of leisure inbound overnight visitors by categories, 2023



Quality vs. price orientation

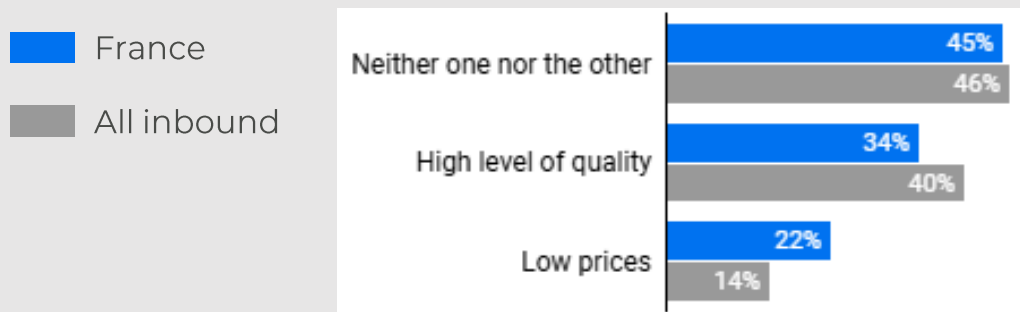
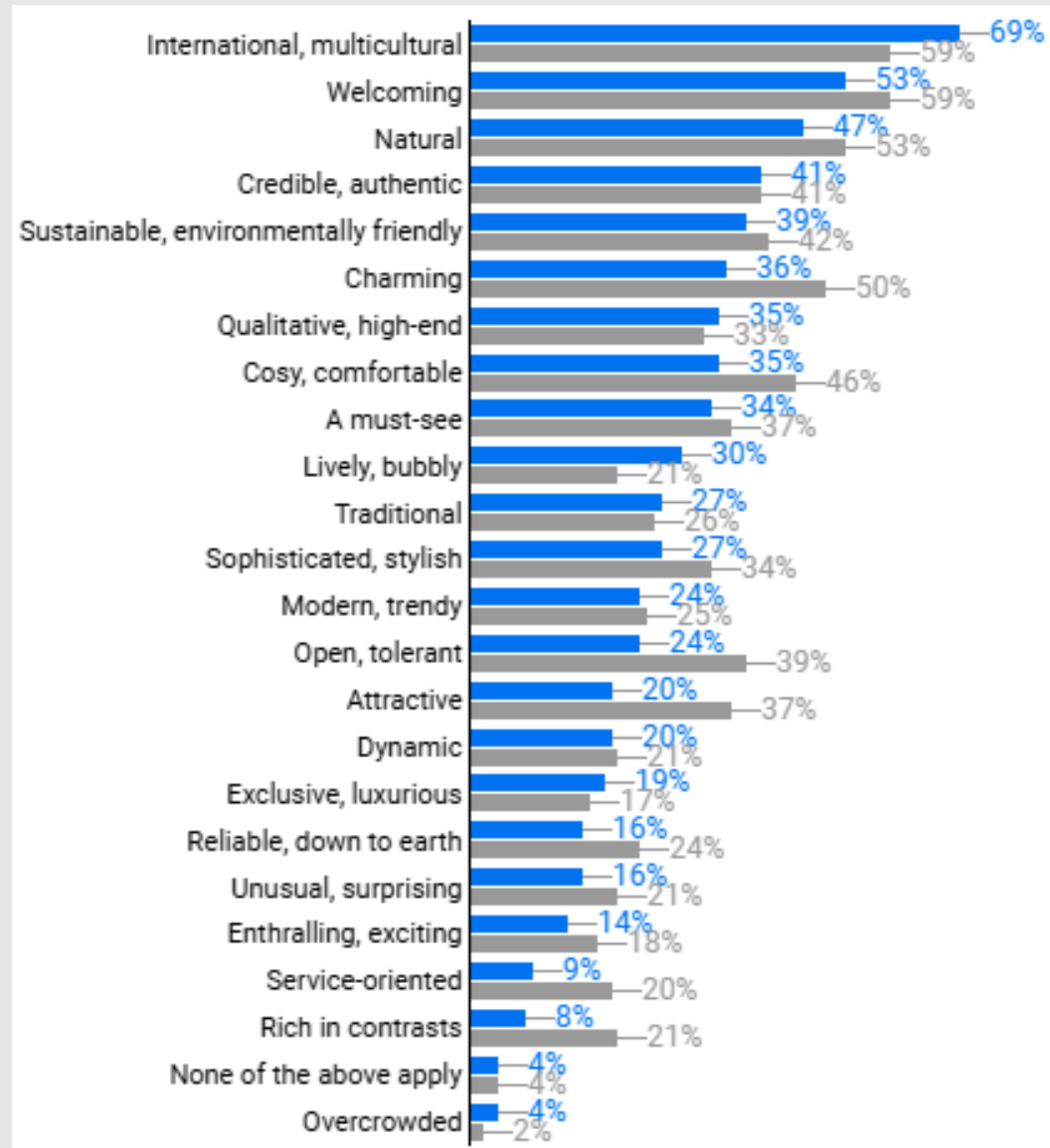


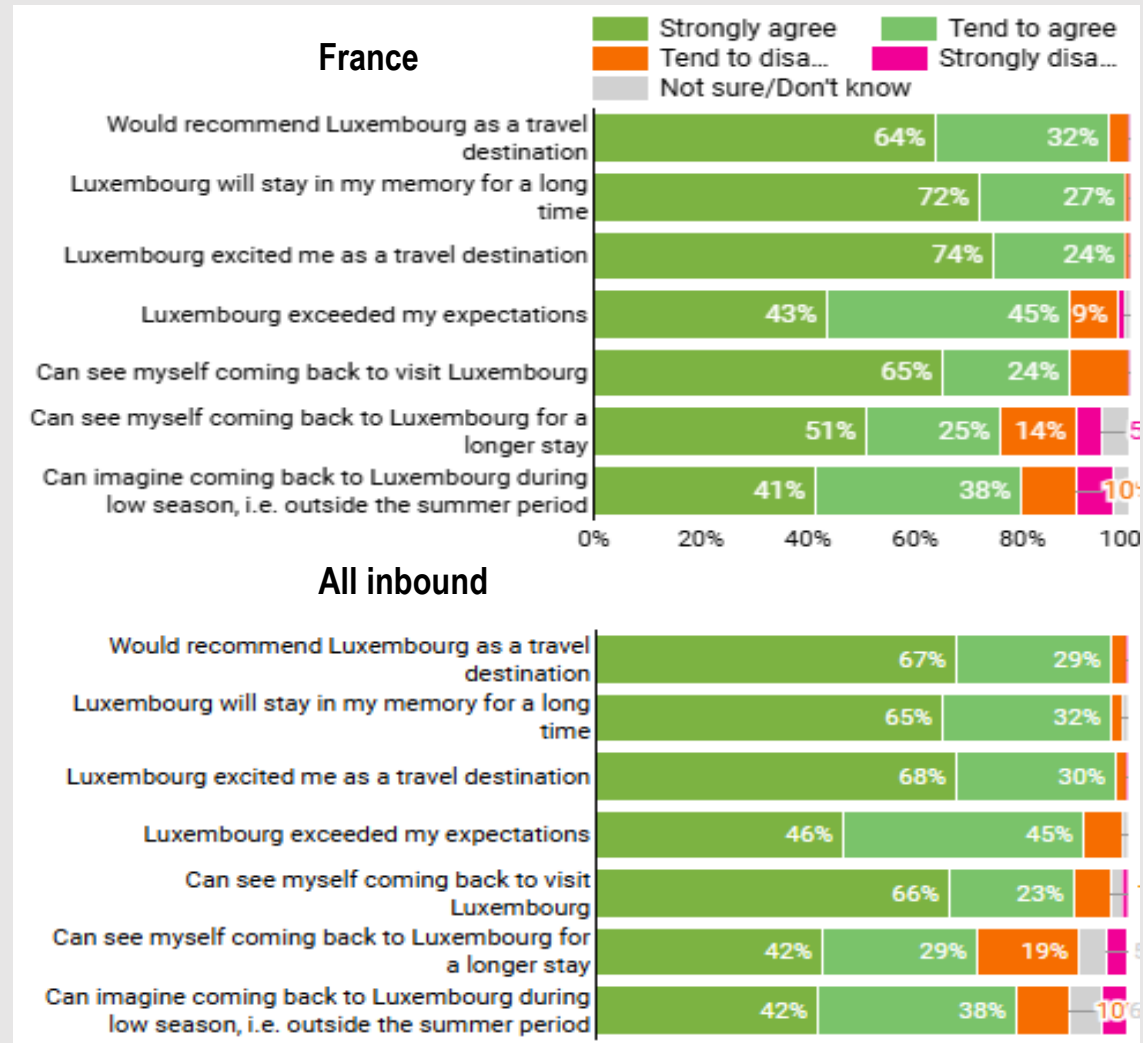
Image perception of Luxembourg

Inbound leisure visitors with overnight, 2023



Visitor satisfaction and recommendation

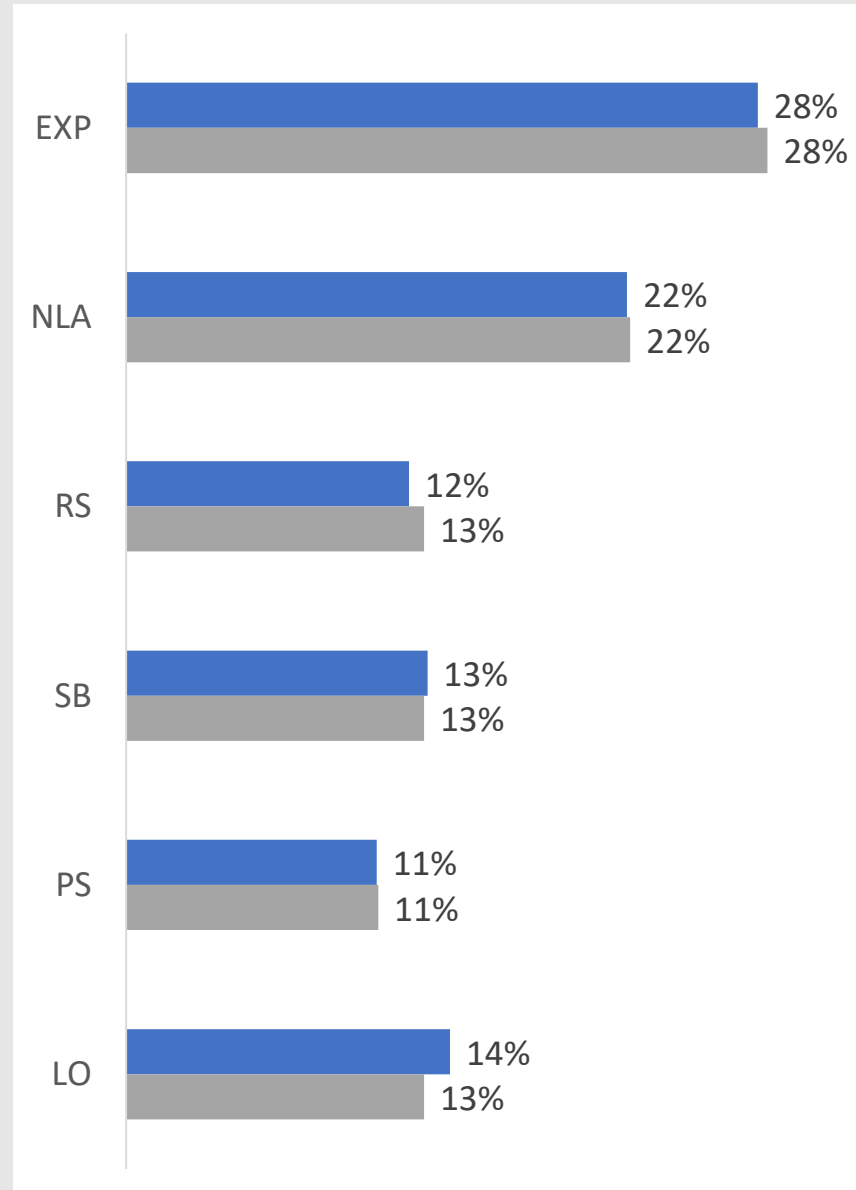
Inbound leisure visitors with overnight, 2023



LFT Target Segments



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



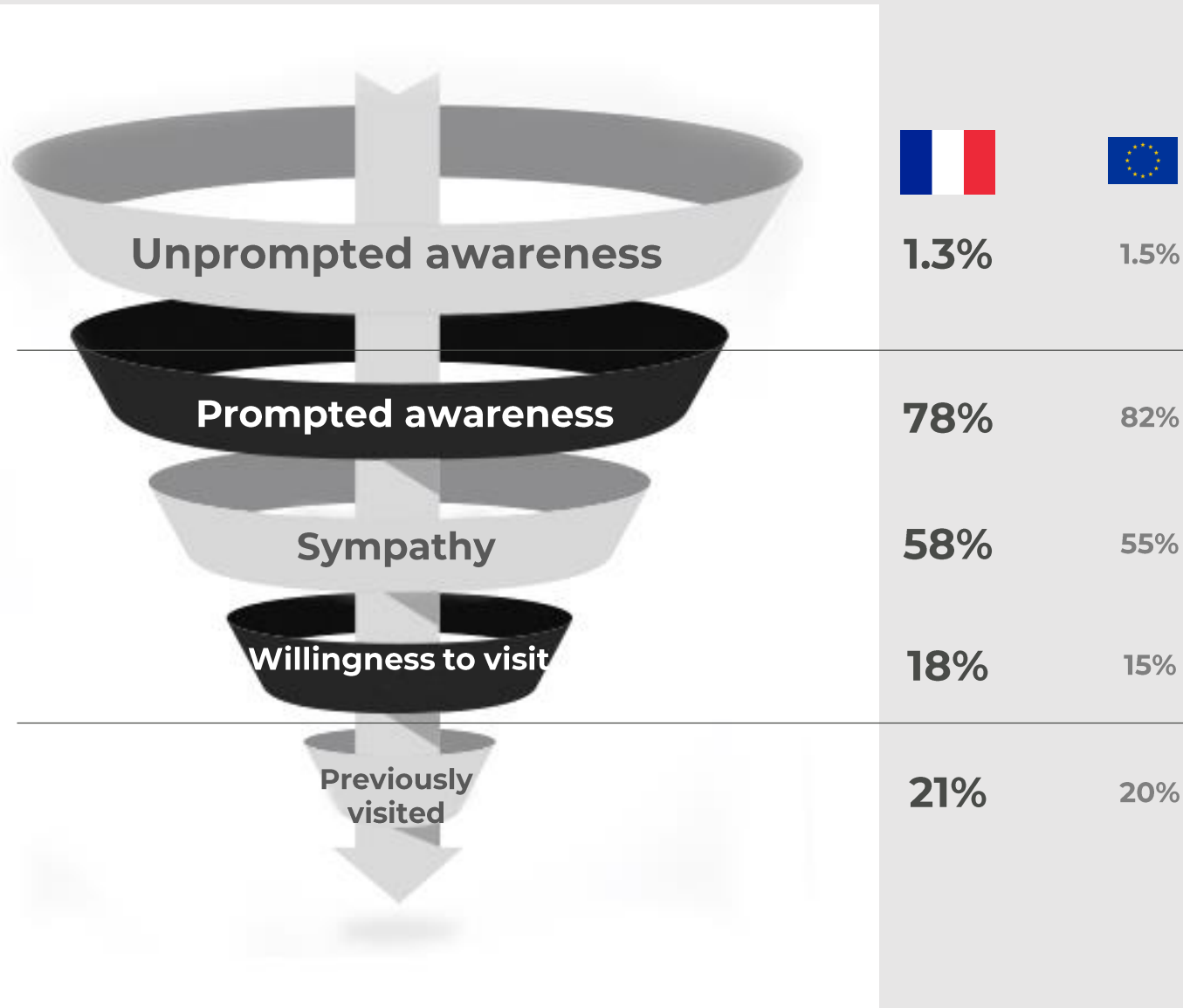
France
All inbound



Brand strength & Growth potential

Brand Funnel 2024

Assessing Luxembourg's brand strength as a destination

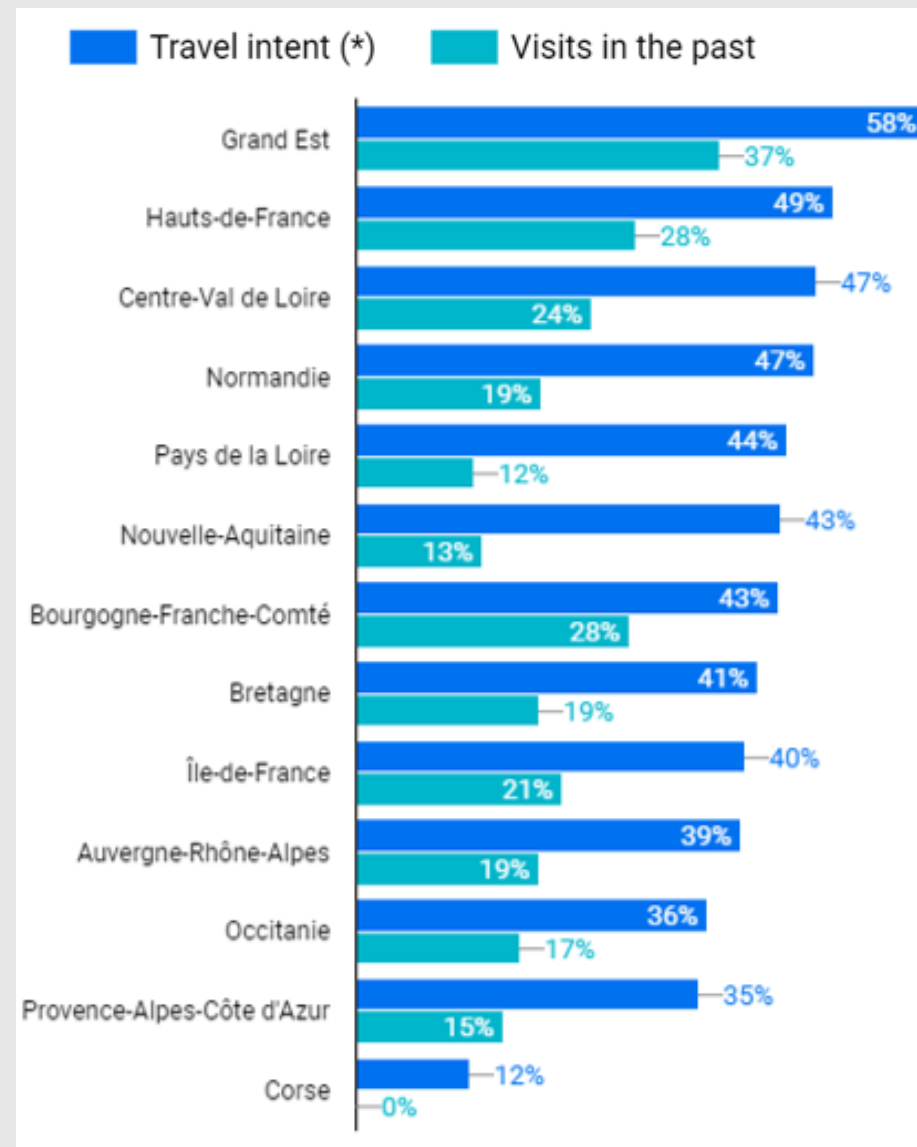


Core future visitor potential from France (*)
8.4 million

Source: LFT Brand & Potential Study.
(*) Based on travel intent for next 3 years.




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	26%




(*) 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	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	27%
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%
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Remembrance	26	22	15%
Adventure/action	22	23	15%
Countryside	17	24	15%
Camping	19	25	13%
MTB	25	26	13%

Growth potential for themes (**)

- Culinary & Wine
- Nature
- Resting/relaxation
- Architecture/townscapes
- Sustainability
- Castles
- Adventure/action
- History/Unesco
- Countryside
- Hiking
- Camping
- MTB

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




(**) Themes for which Luxembourg's theme suitability is still relatively low, compared to the general theme interest in the source market, and to the theme suitability perception across other source markets (European average).

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

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

Luxembourg's Brand Value Ratings (*)



Feature			
	Rank	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.



Your contact



Alain Krier

Head of Insights & Strategy

T. +352 42 82 82 36

alain.krier@LfT.lu



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