



Luxembourg for Tourism  
**Market profile**  
**GERMANY**  
**2023**



# **Economic indicators & General Travel Demand**

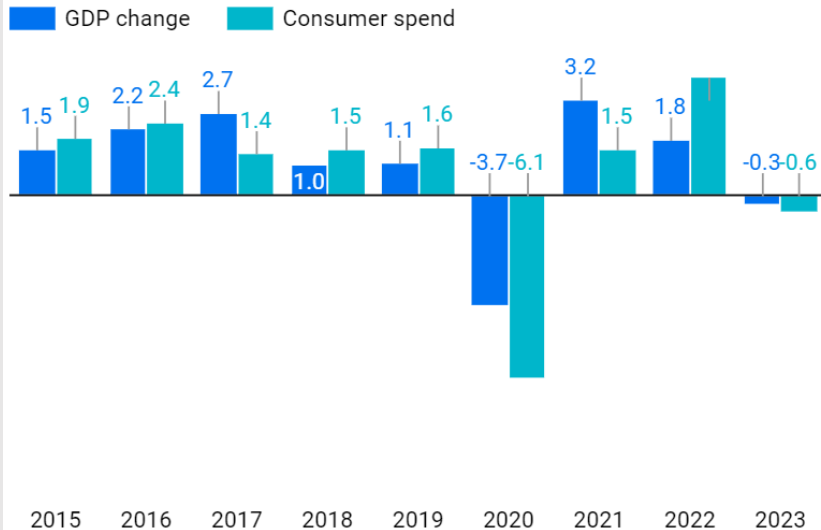
# Economic indicators - General travel demand



## Economy & population

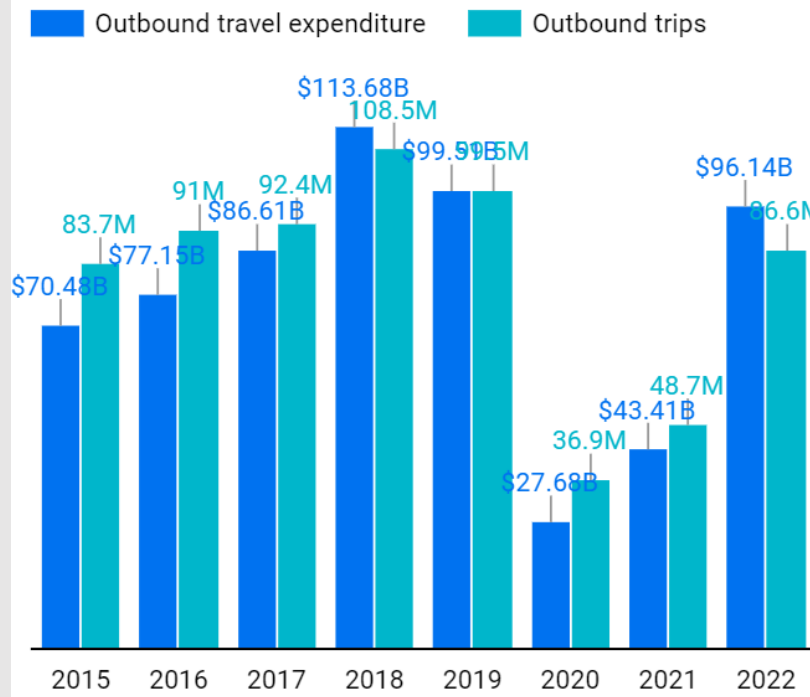
GDP (\$) per capita **52,727**      Unemployment (%) **3.0**      Population (mn) **84.5**      Inflation (%) **6.0**

### GDP and Consumer spending, % annual change



Share of short trips (1-3 nights),  
% all outbound trips (2022)  
**21.1%**

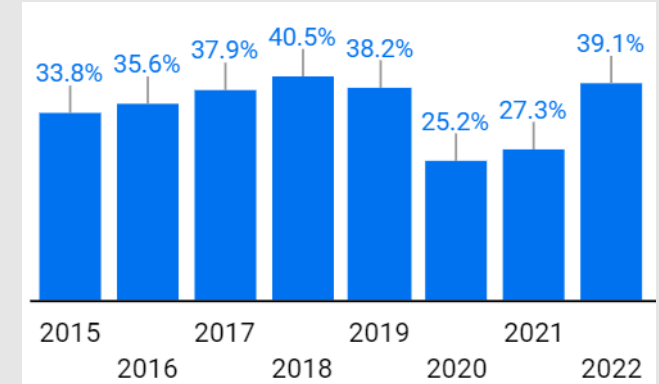
## Outbound trips and travel expenditure



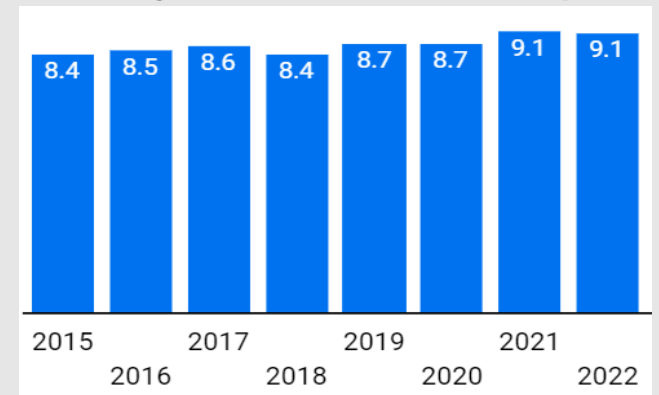
Average spend  
per outbound trip (2019)  
**1.000 \$**

Outbound travel intensity  
**1.20 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)  
**92.3%**



# **Arrivals & nights in paid accommodation in Luxembourg**

# Nights, arrivals & length of stay in paid accommodation 2023



**Nights,  
paid accommodation, 2023**



**+13%** (vs. 2022)  
**+25%** (vs. 2019)

**Arrivals,  
paid accommodation, 2023**



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

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



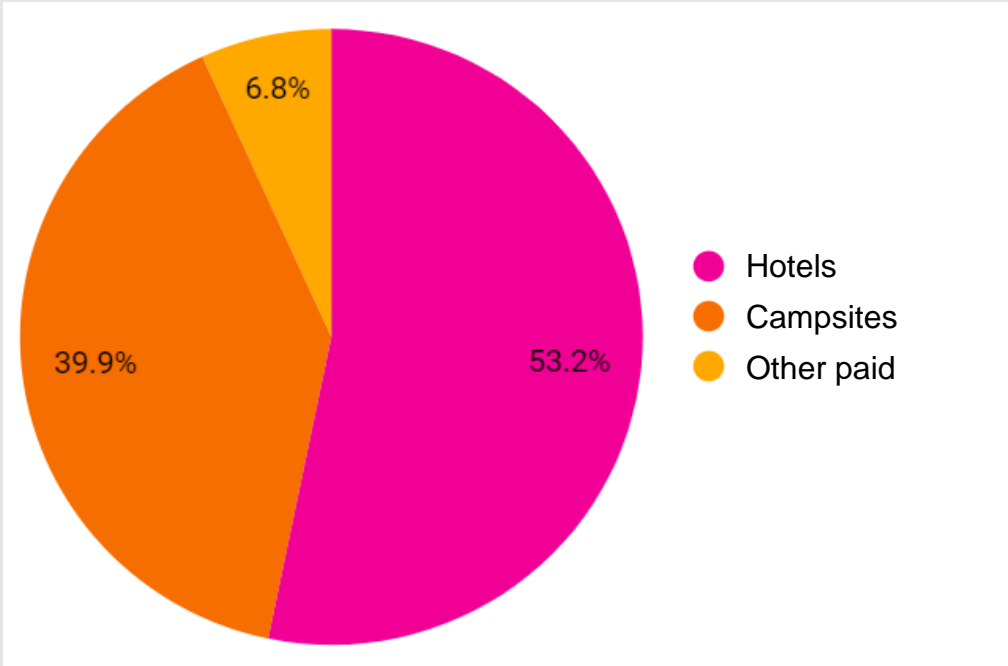
**-0.05 days** (vs. 2022)  
**+0.17 days** (vs. 2019)

# Nights & arrivals in paid accommodation

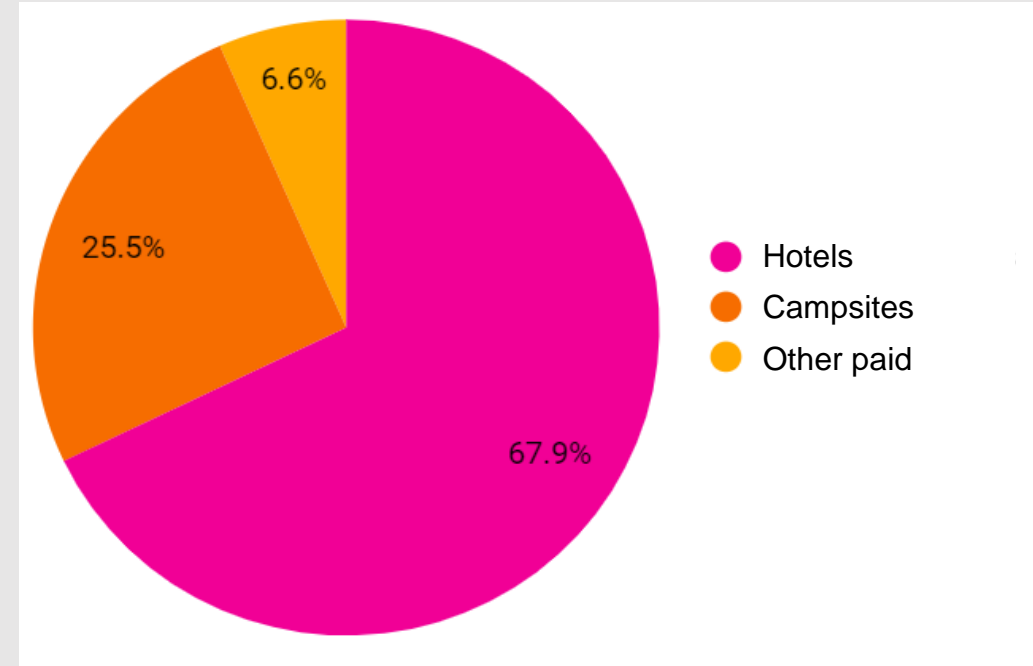
## Type of accommodation, 2023



**Nights,  
paid accommodation, 2023**



**Arrivals,  
paid accommodation, 2023**



<b>Hotels</b>	<b>278.001</b>	+8% (vs. 2022) +2% (vs. 2019)
<b>Campsites</b>	<b>208.553</b>	+22% (vs. 2022)+95% (vs. 2019)
<b>Other paid accomm.</b>	<b>35.534</b>	+4% (vs. 2022) -7% (vs. 2019)

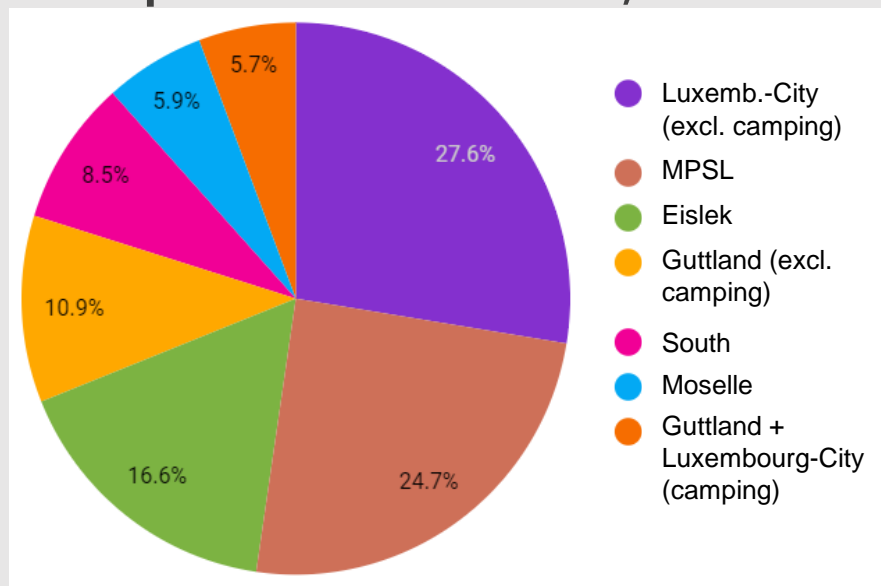
<b>Hotels</b>	<b>157.371</b>	+16% (vs. 2022)+4% (vs. 2019)
<b>Campsites</b>	<b>59.185</b>	+14% (vs. 2022)+80% (vs. 2019)
<b>Other paid accomm.</b>	<b>15.335</b>	+10% (vs. 2022)-8% (vs. 2019)

# Nights & arrivals in paid accommodation

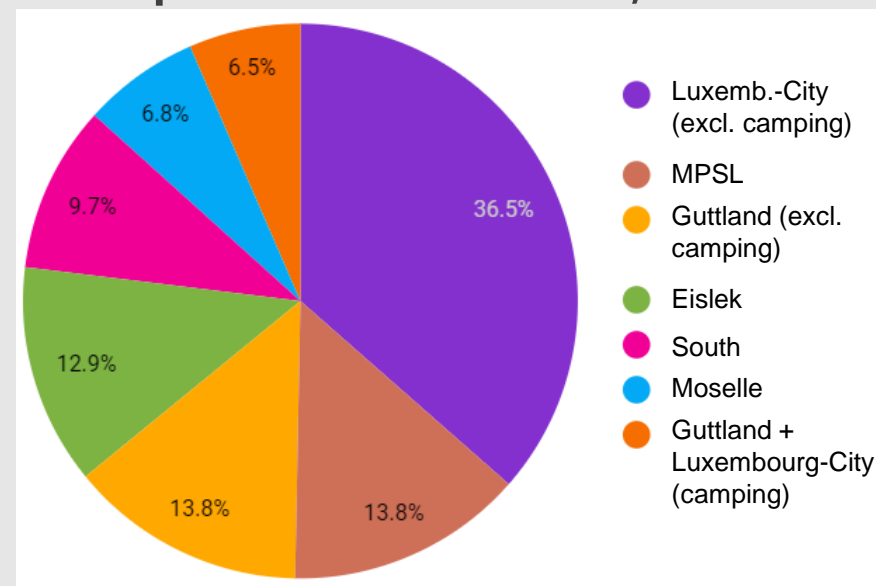
## Regions, 2023



### Nights, paid accommodation, 2023



### Arrivals, paid accommodation, 2023



<b>Lux.-City (excl. camping)</b>	<b>144.081</b>	<b>+10% (vs. 2022) -4% (vs. 2019)</b>
<b>MPSL</b>	<b>129.025</b>	<b>+32% (vs. 2022) +74% (vs. 2019)</b>
<b>Eislek</b>	<b>86.688</b>	<b>+4% (vs. 2022) +38% (vs. 2019)</b>
<b>Guttland (excl. camping)</b>	<b>57.132</b>	<b>+21% (vs. 2022) +31% (vs. 2019)</b>
<b>South</b>	<b>44.369</b>	<b>-5% (vs. 2022) +11% (vs. 2019)</b>
<b>Moselle</b>	<b>30.846</b>	<b>-9% (vs. 2022) -4% (vs. 2019)</b>
<b>Guttland/Lux.-City (camping)</b>	<b>29.947</b>	<b>+25% (vs. 2022) +92% (vs. 2019)</b>

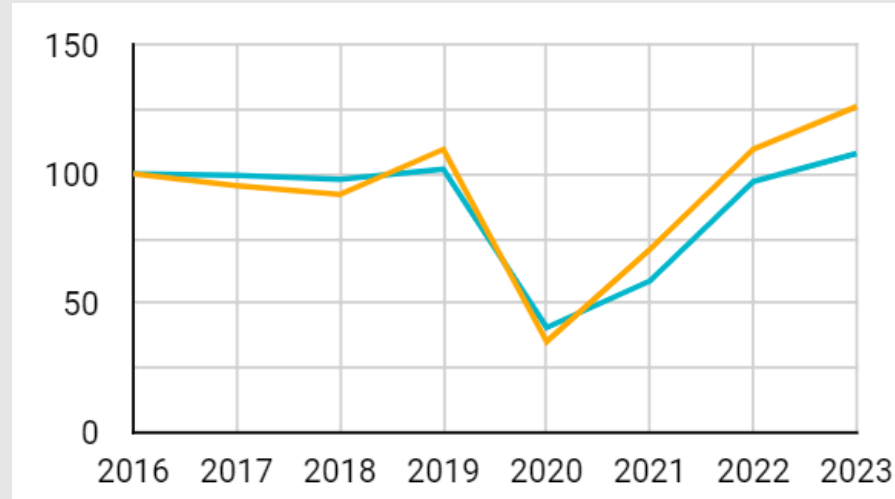
<b>Lux.-City (excl. camping)</b>	<b>84.584</b>	<b>+13% (vs. 2022) -1% (vs. 2019)</b>
<b>MPSL</b>	<b>32.065</b>	<b>+10% (vs. 2022) +32% (vs. 2019)</b>
<b>Guttland (excl. camping)</b>	<b>31.987</b>	<b>+34% (vs. 2022) +32% (vs. 2019)</b>
<b>Eislek</b>	<b>29.807</b>	<b>+9% (vs. 2022) +20% (vs. 2019)</b>
<b>South</b>	<b>22.551</b>	<b>+8% (vs. 2022) +13% (vs. 2019)</b>
<b>Moselle</b>	<b>15.785</b>	<b>+20% (vs. 2022) +5% (vs. 2019)</b>
<b>Guttland/Lux.-City (camping)</b>	<b>15.112</b>	<b>+27% (vs. 2022) +91% (vs. 2019)</b>

# Arrivals in paid accommodation

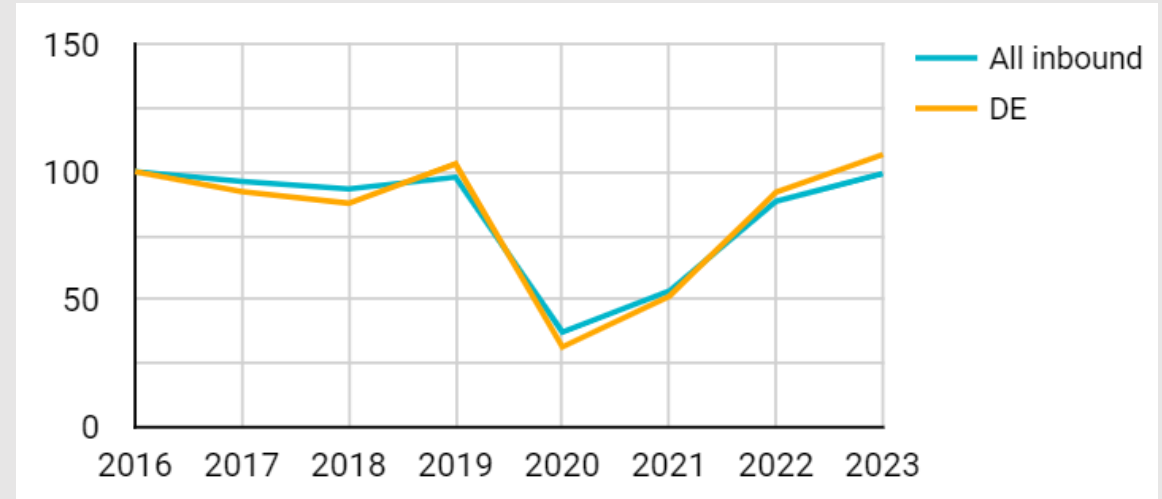
## Trends 2016-2023



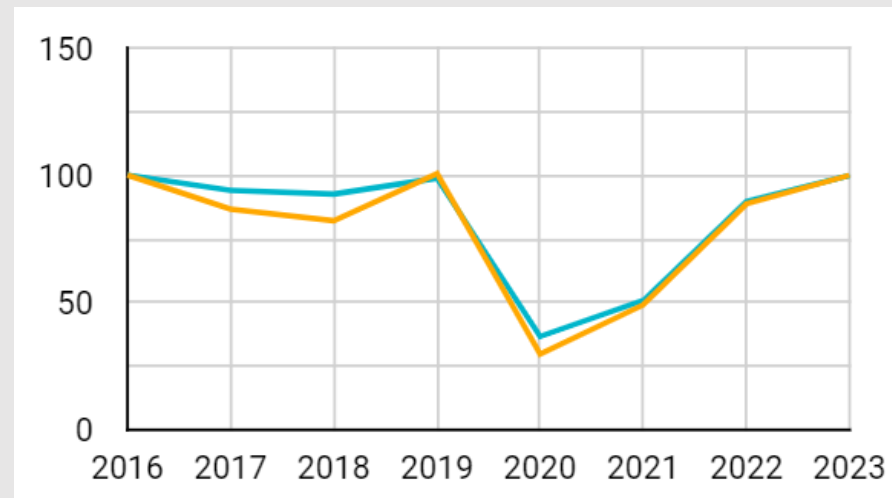
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



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



(\*), excluding camping.  
Source: Statec

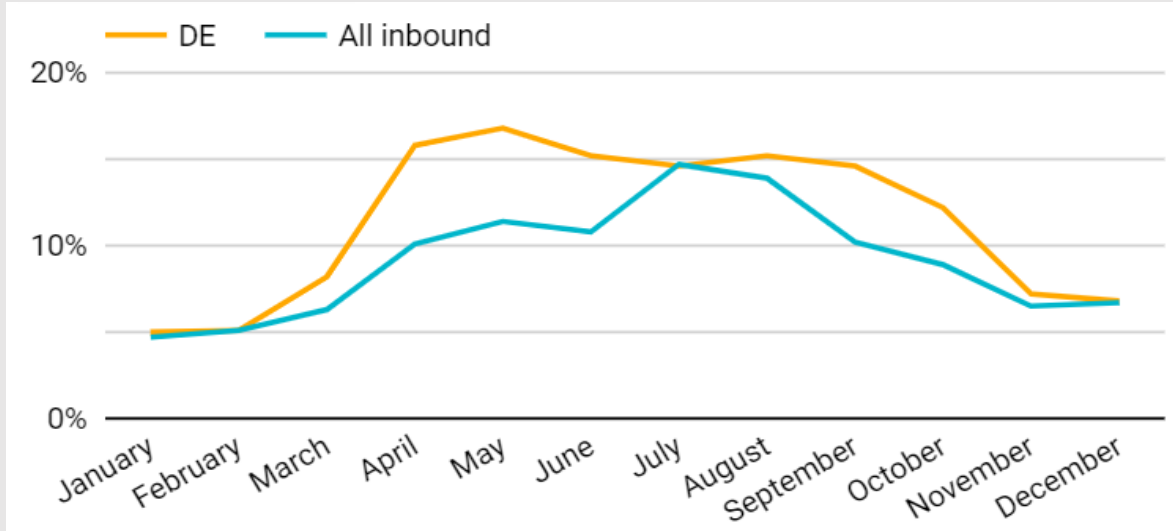


# Arrivals in paid accommodation

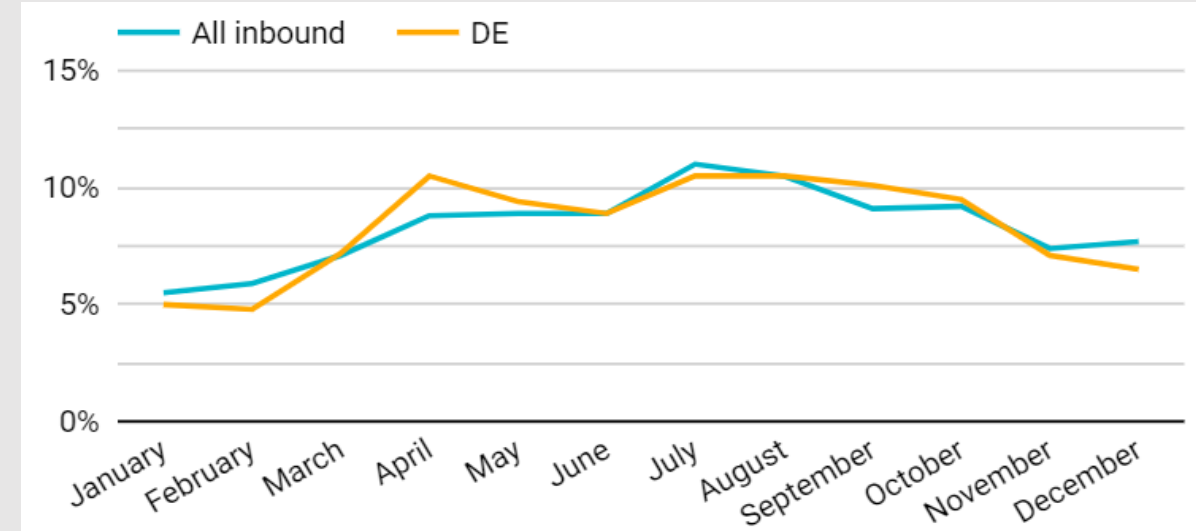
## Seasonality



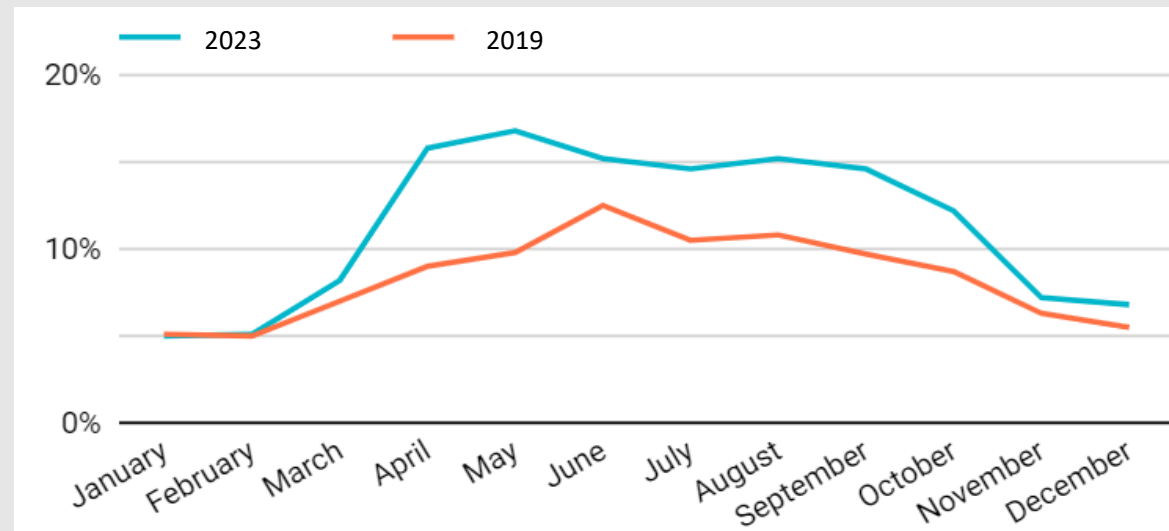
### All paid accommodation, 2023



### Hotels, 2023



### All paid accommodation, arrivals from Germany



# Short-term rentals

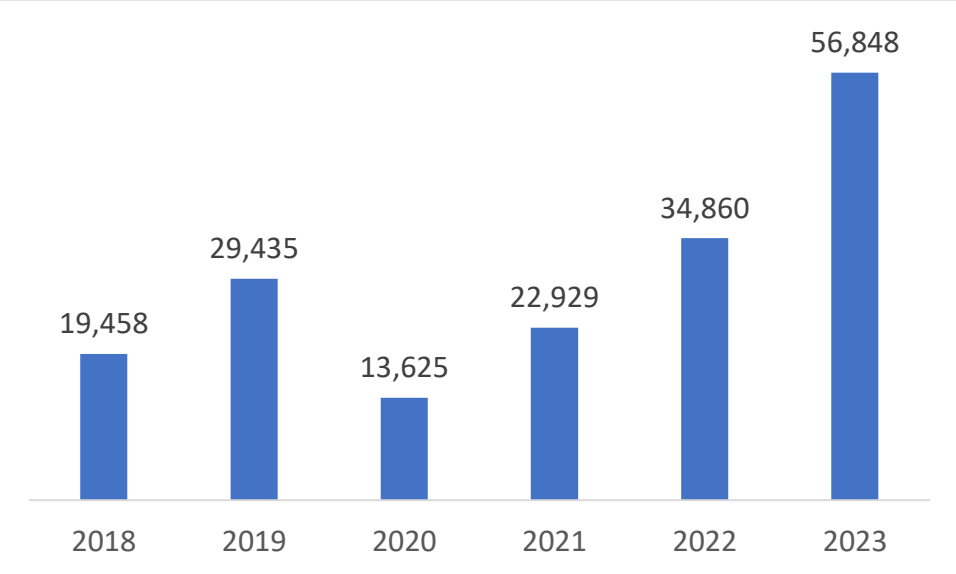


**Nights,  
Short-term rentals, 2023**



**+63% (vs. 2022)**  
**+93% (vs. 2019)**

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





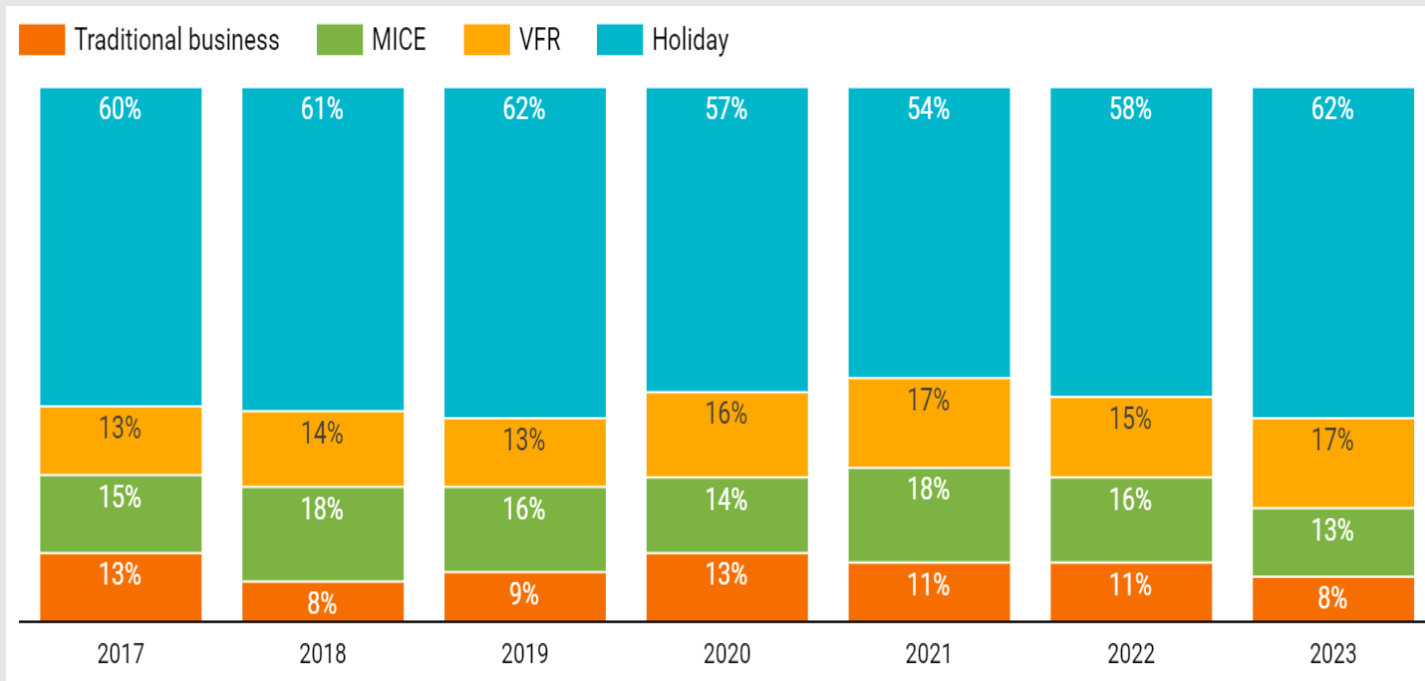
# **Characteristics of German inbound trips to Luxembourg**

# German trips to Luxembourg with overnight (all accommodation)



## Purpose of visit, 2017-2023

German trips to Luxembourg, 2017-2023



### 2023

Germany to Luxembourg      Europe to Luxembourg

Holiday	62%	62%
VFR	17%	15%
MICE	13%	14%
Traditional Business	8%	9%



# **Travel behaviour of German leisure visitors in Luxembourg**

# Holiday types

## Inbound leisure visitors with overnight, 2023



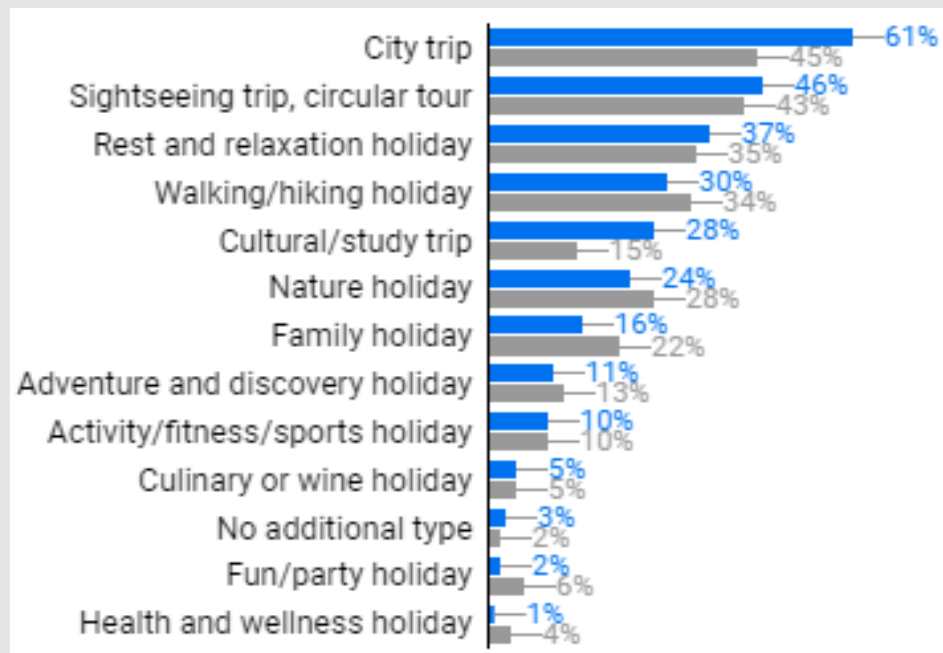
Germany

All inbound

### Main holiday types

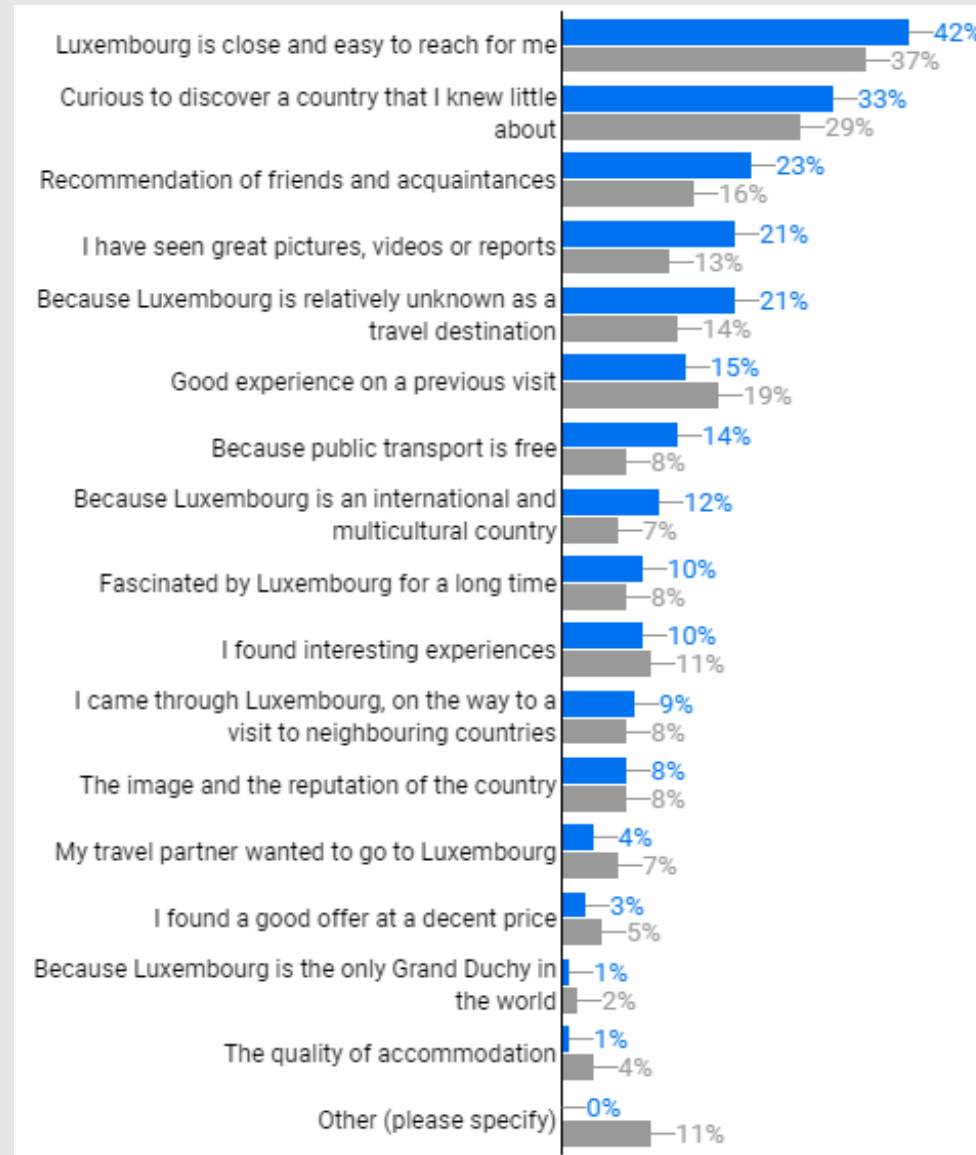
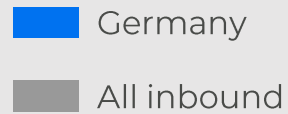


### Additional holiday types



# Key decision criteria for choosing Luxembourg

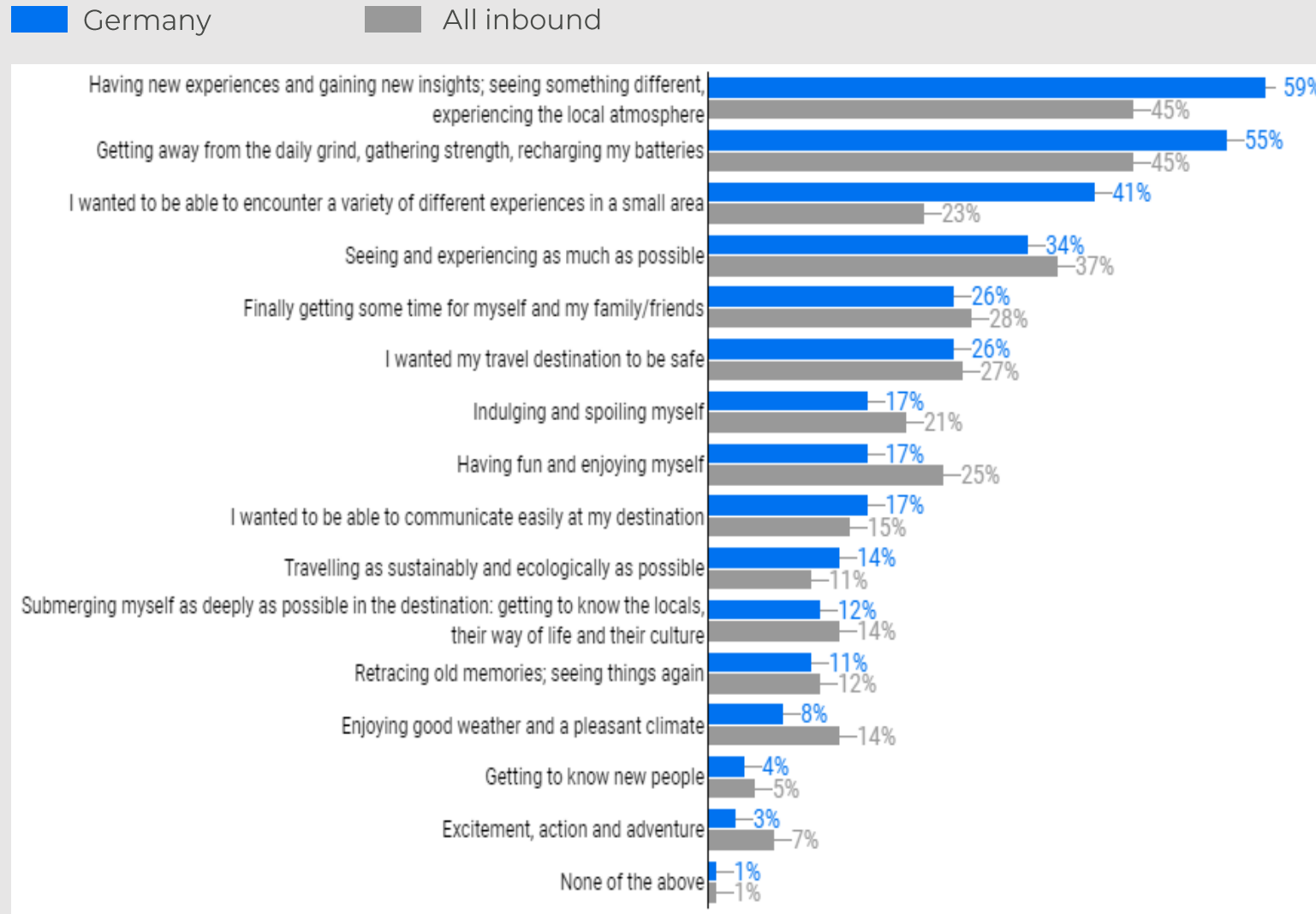
## Inbound leisure visitors with overnight (\*), 2023





# Key travel motivations

## Inbound leisure visitors with overnight, 2023



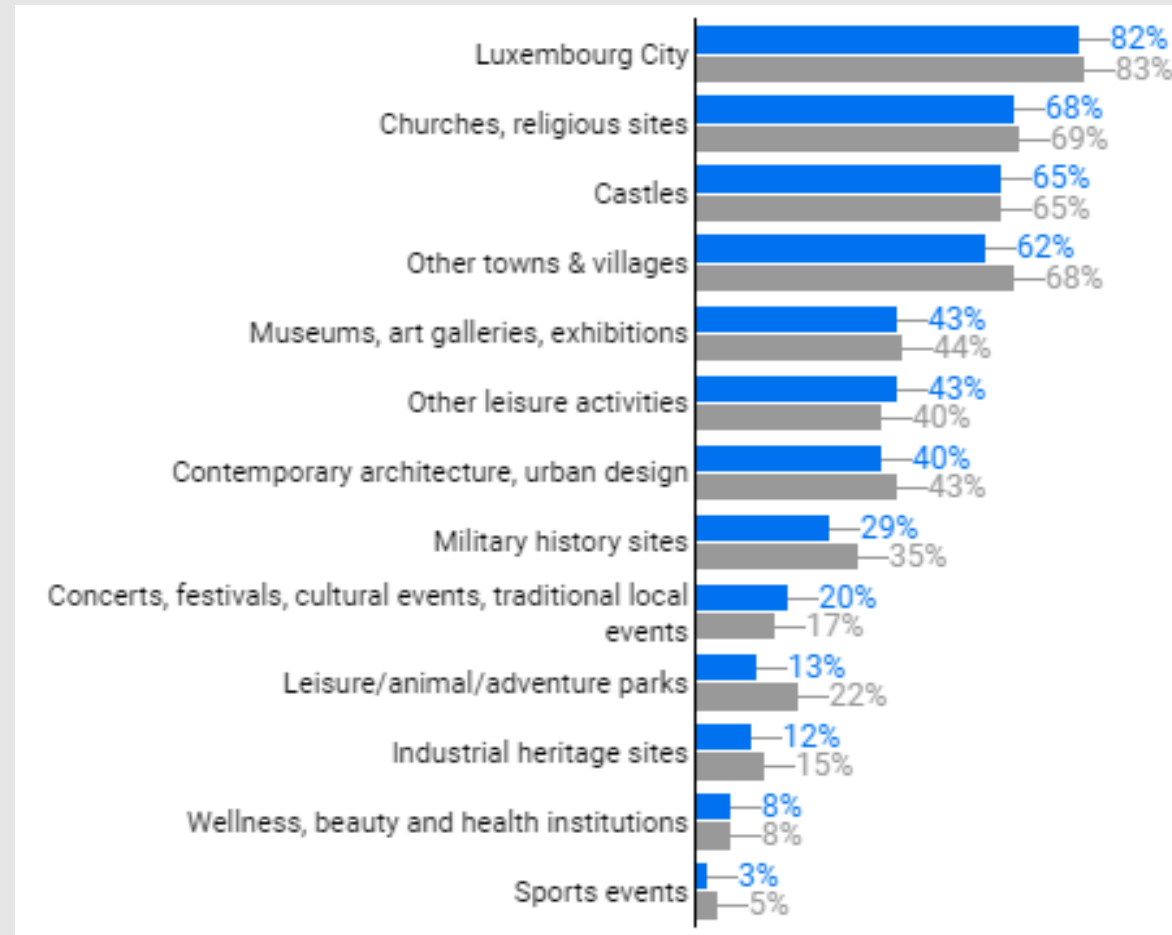




# Type of places visited in Luxembourg

## Inbound leisure visitors with overnight, 2023

Germany All inbound

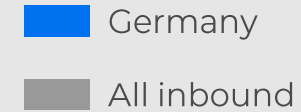


# Activities undertaken in Luxembourg

## Inbound leisure visitors with overnight, 2023



### Non-sporting activities



### Sporting activities



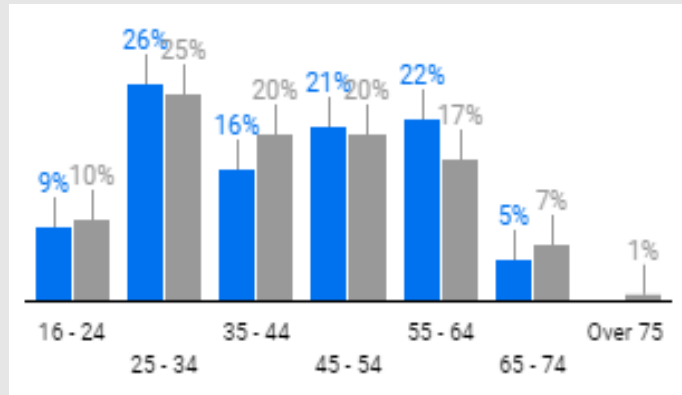
# Transport, travel party, age, repeat visits and cross-border trips

## Inbound leisure visitors with overnight, 2023

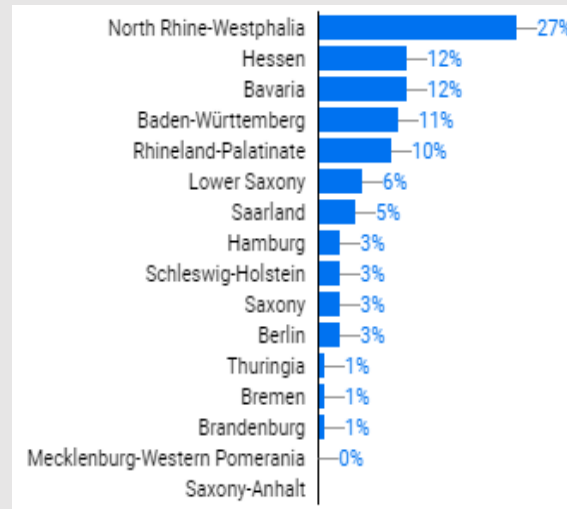


Germany (blue square) All inbound (grey square)

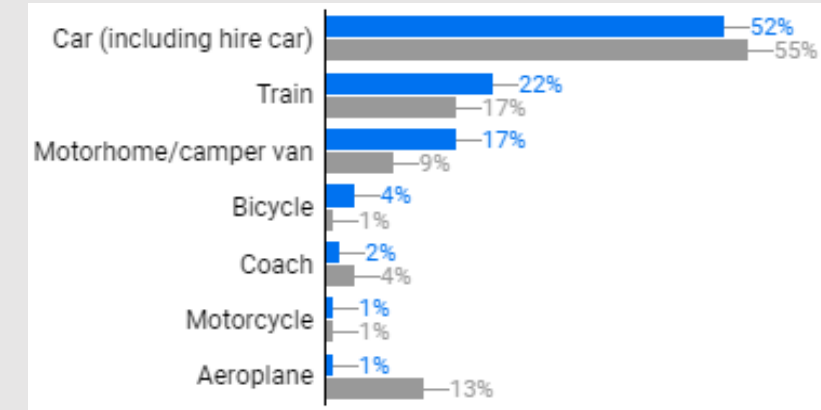
Age groups



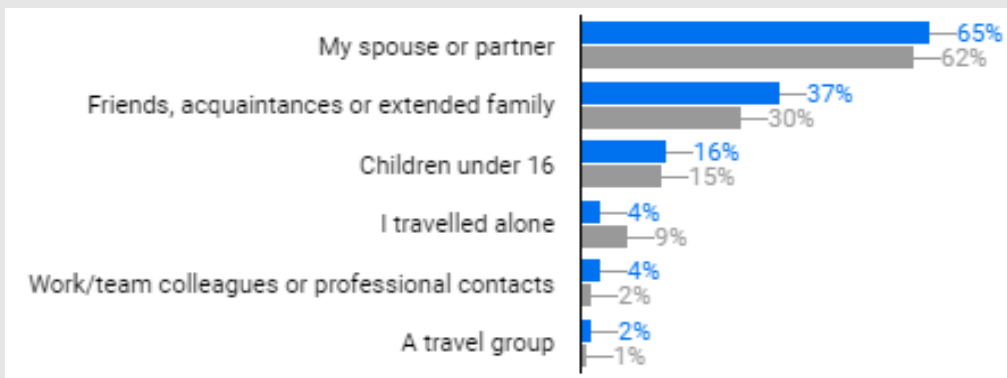
Region of origin



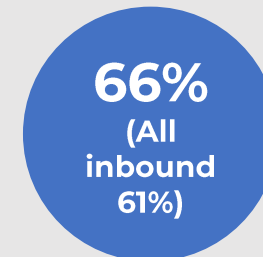
Mode of transport to access Luxembourg



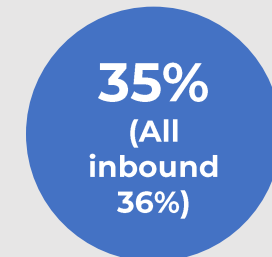
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

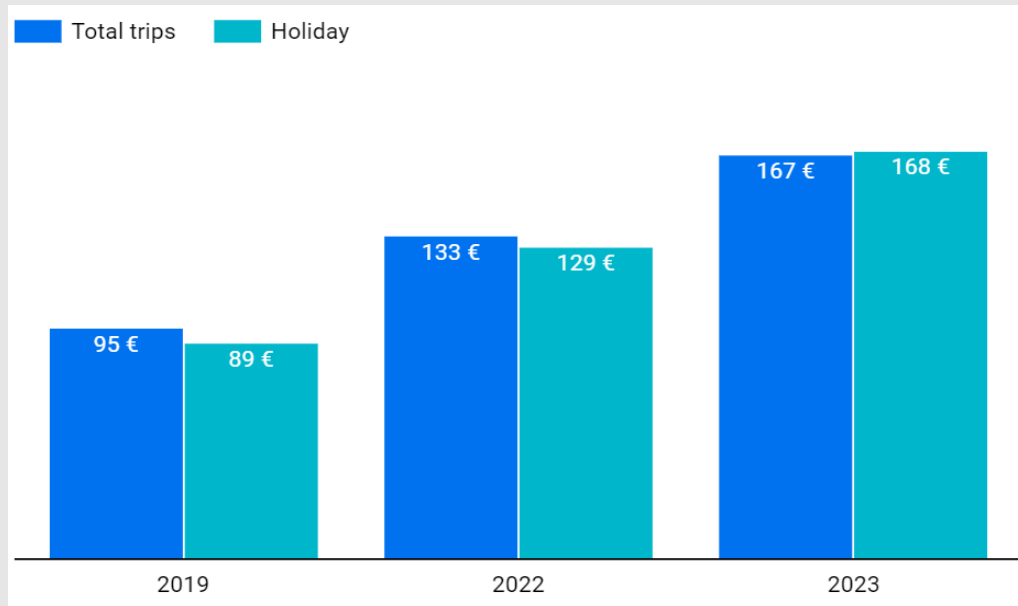


# Expenditure

## Inbound trips to Luxembourg with overnight



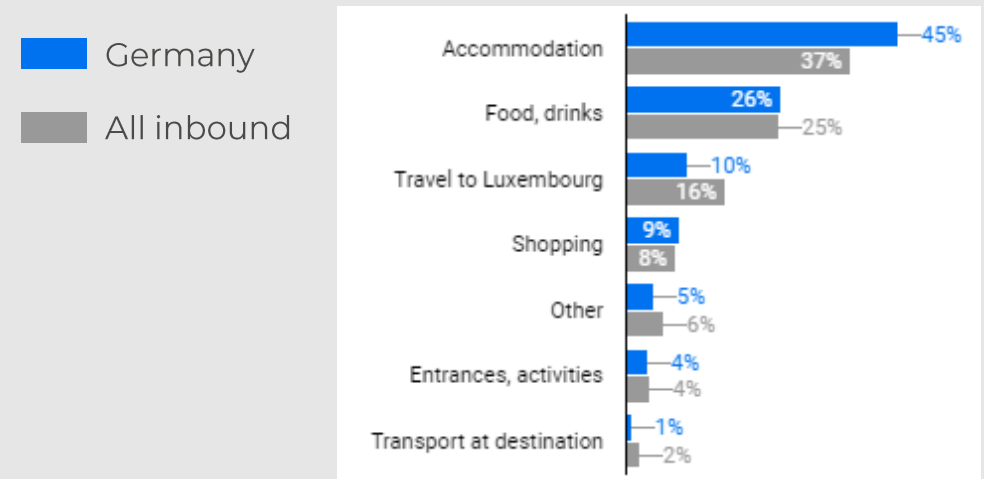
### German trips to Luxembourg : average spend per pers. per day



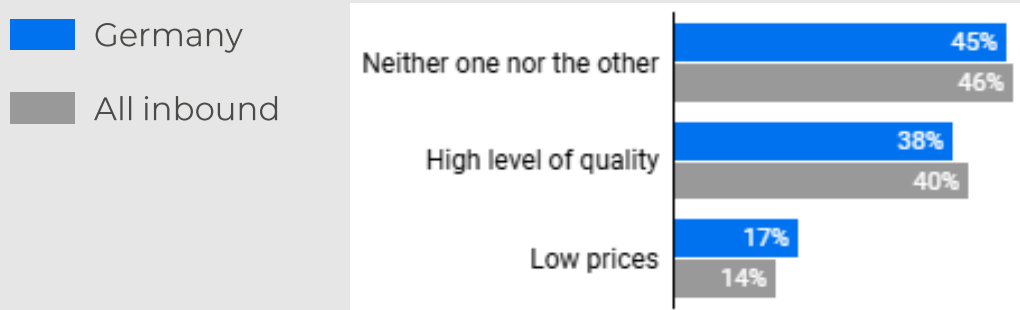
2023

	Germany to Luxembourg	Europe to Luxembourg
Spend/day/pers. on <b>all</b> trips	167 €	152 €
Spend/day/pers. on <b>holiday</b> trips	168 €	144 €

### Expenditure of leisure inbound overnight visitors by categories, 2023

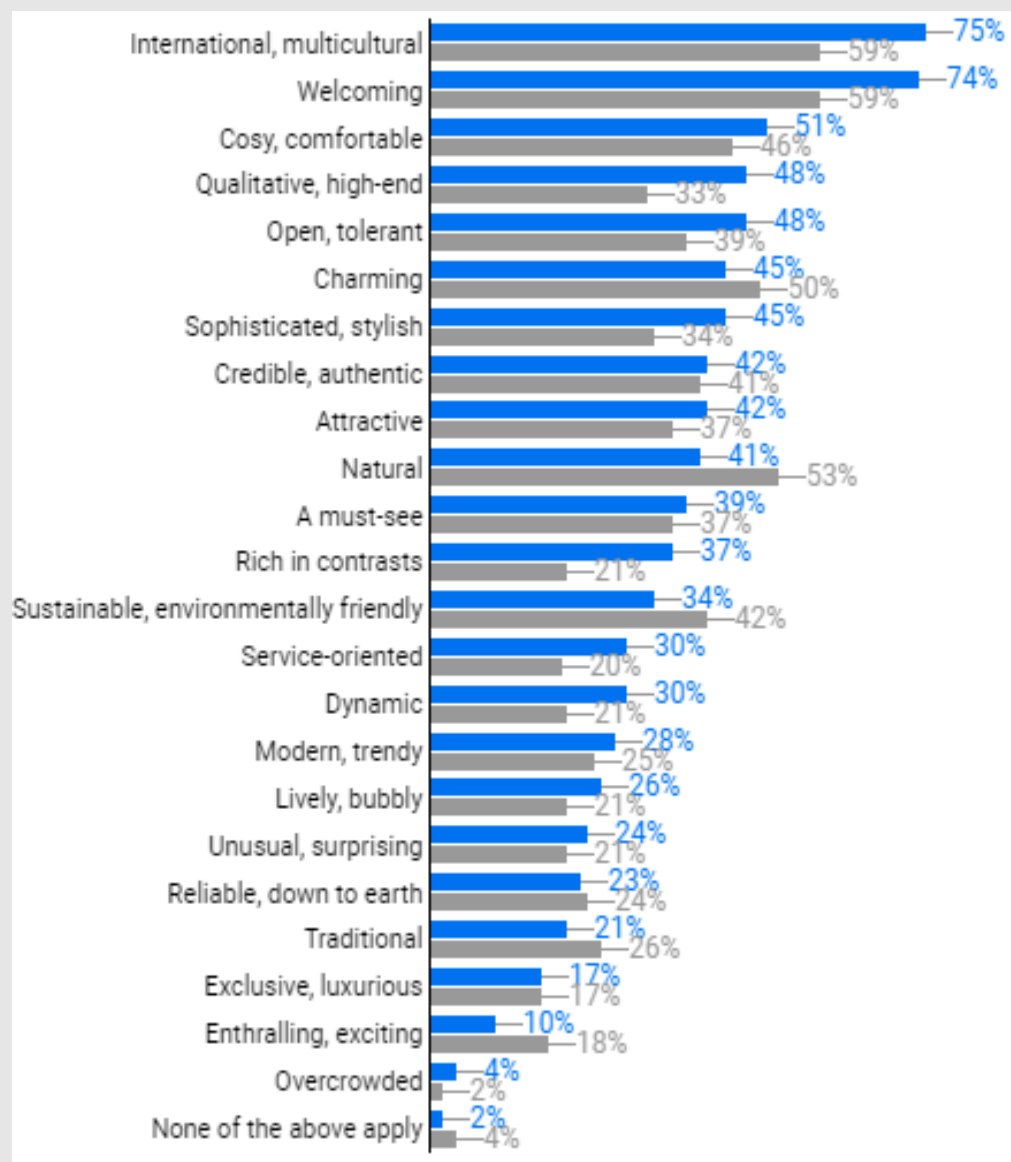
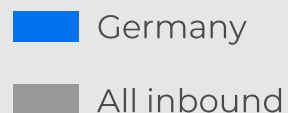


### Quality vs. price orientation



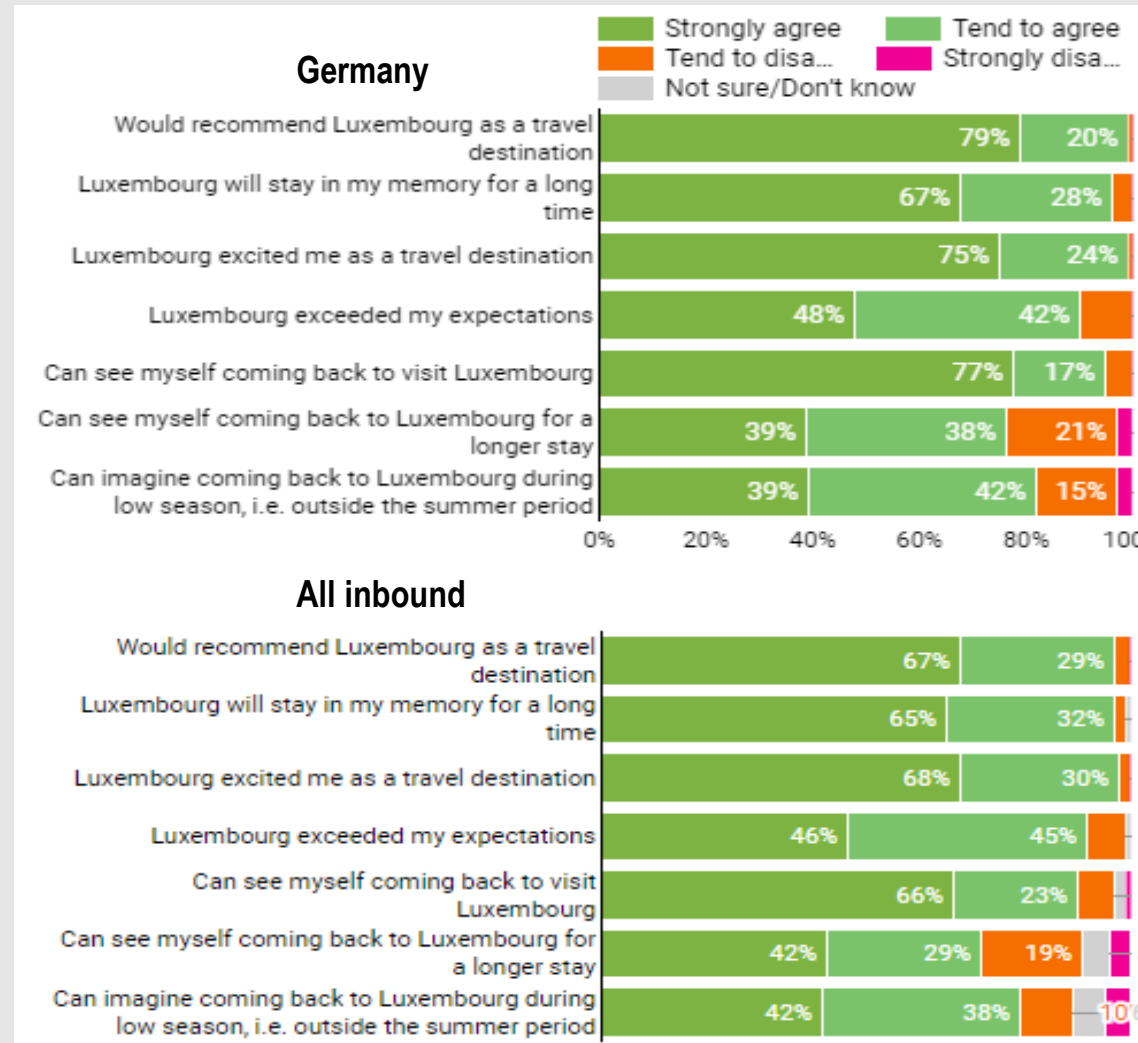
# Image perception of Luxembourg

## Inbound leisure visitors with overnight, 2023



# Visitor satisfaction and recommendation

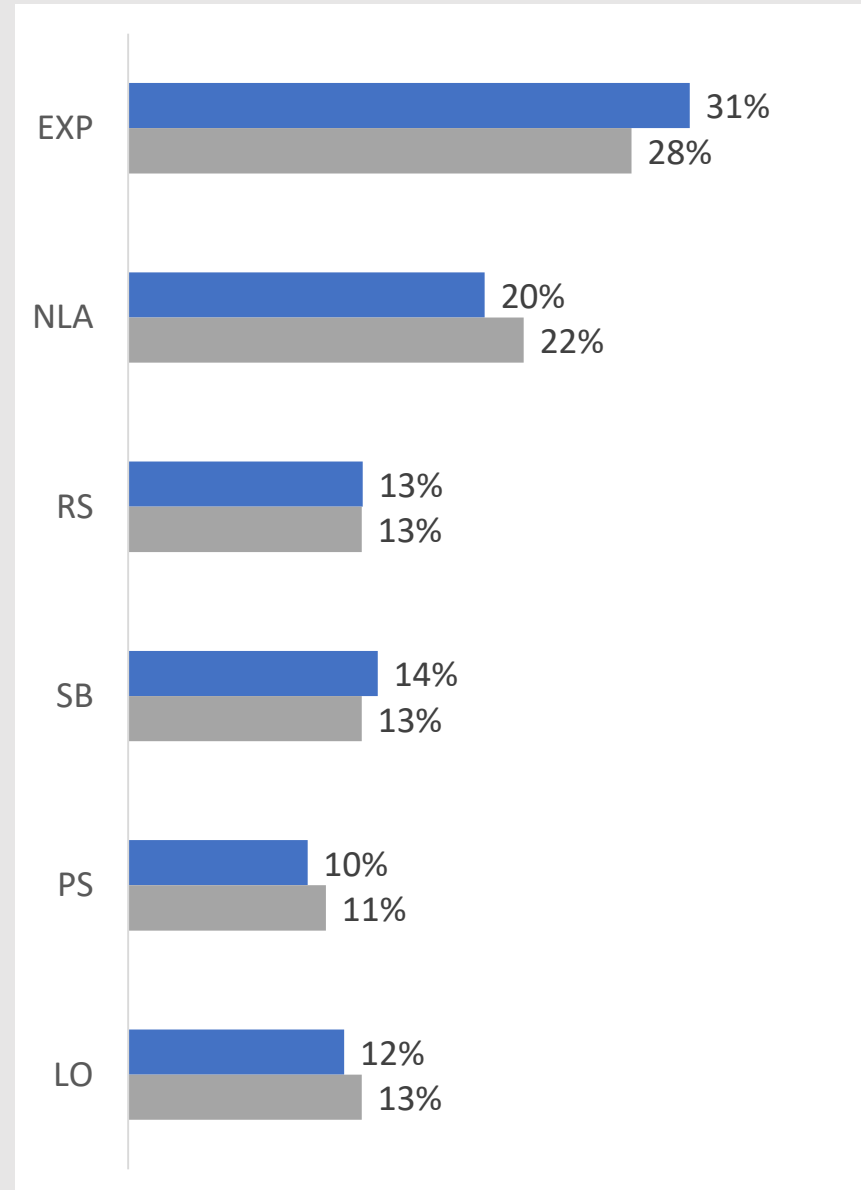
## Inbound leisure visitors with overnight, 2023



# LFT Target Segments



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



Germany  
All inbound

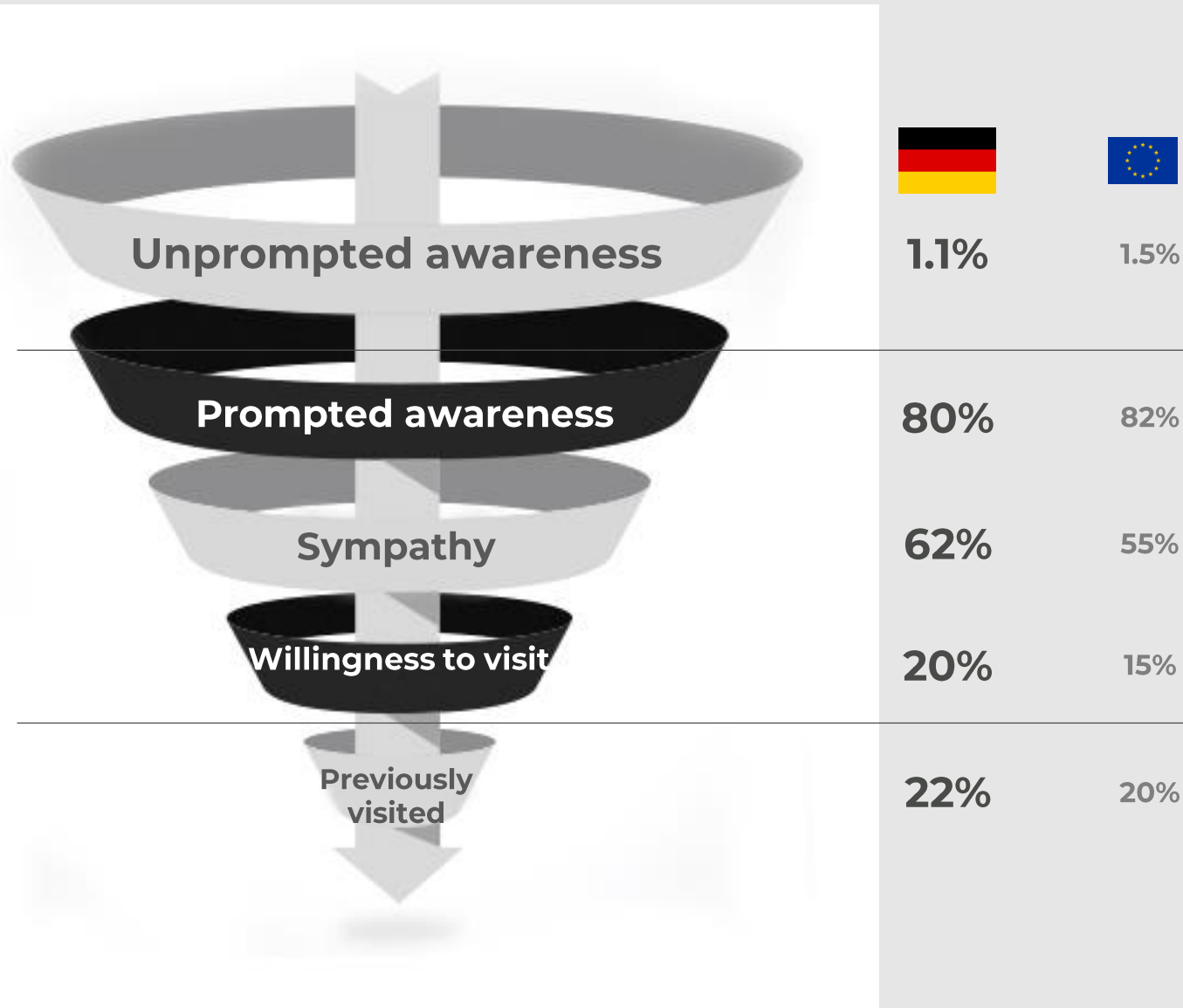


# **Brand strength & Growth potential**



# Brand Funnel 2024

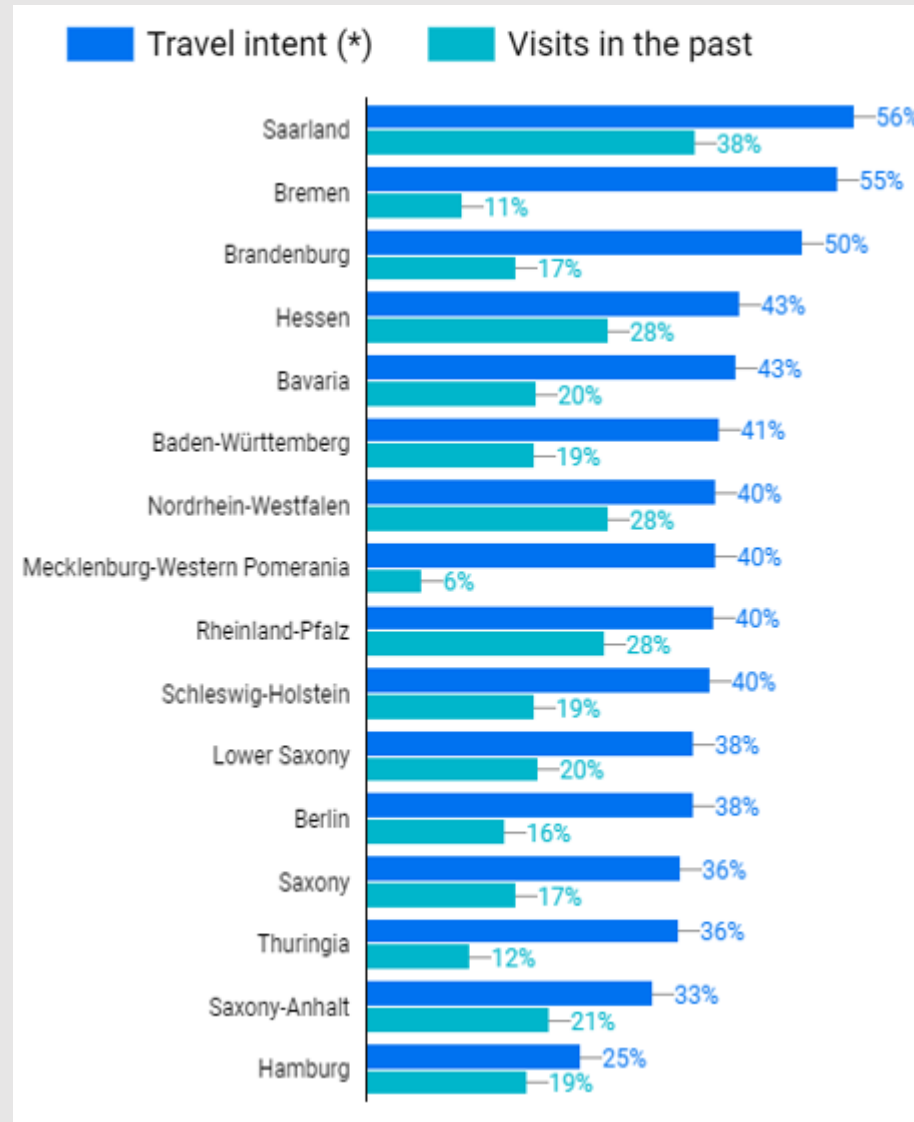
Assessing Luxembourg's brand strength as a destination



**Core future visitor potential  
from Germany (\*)**  
11.8 million




# 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%

## Growth potential for themes (\*\*)

- Resting/relaxation
- Fun/entertainment
- Culture
- Family
- Sustainability
- Nightlife (\*\*\*)
- Hiking
- Adventure/action
- Wellness
- Countryside
- Industrial Heritage
- 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
safe	1	<b>1</b>	44%
clean	2	<b>2</b>	38%
welcoming, hospitable	4	<b>3</b>	37%
open-minded, tolerant, international	6	<b>4</b>	37%
of high quality	3	<b>5</b>	36%
authentic, real	5	<b>6</b>	31%
dynamic, modern	9	<b>7</b>	28%
exclusive, luxurious	8	<b>8</b>	27%
attractive, appealing	7	<b>9</b>	27%
service oriented	10	<b>10</b>	25%
varied, diversified	12	<b>11</b>	25%
surprising	11	<b>12</b>	20%
lively, trendy	13	<b>13</b>	20%
not overcrowded / insider tip	14	<b>14</b>	19%
sustainable	15	<b>15</b>	16%
affordable	16	<b>16</b>	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.





## Your contact



**Alain Krier**

*Head of Insights & Strategy*

T. +352 42 82 82 36

[alain.krier@LfT.lu](mailto:alain.krier@LfT.lu)



**Luxembourg for Tourism GIE**  
6, rue Antoine de Saint-Exupéry  
L-1432 Luxembourg-Kirchberg  
[www.visitluxembourg.com](http://www.visitluxembourg.com)