



Luxembourg for Tourism

Market profile

AUSTRIA

2025

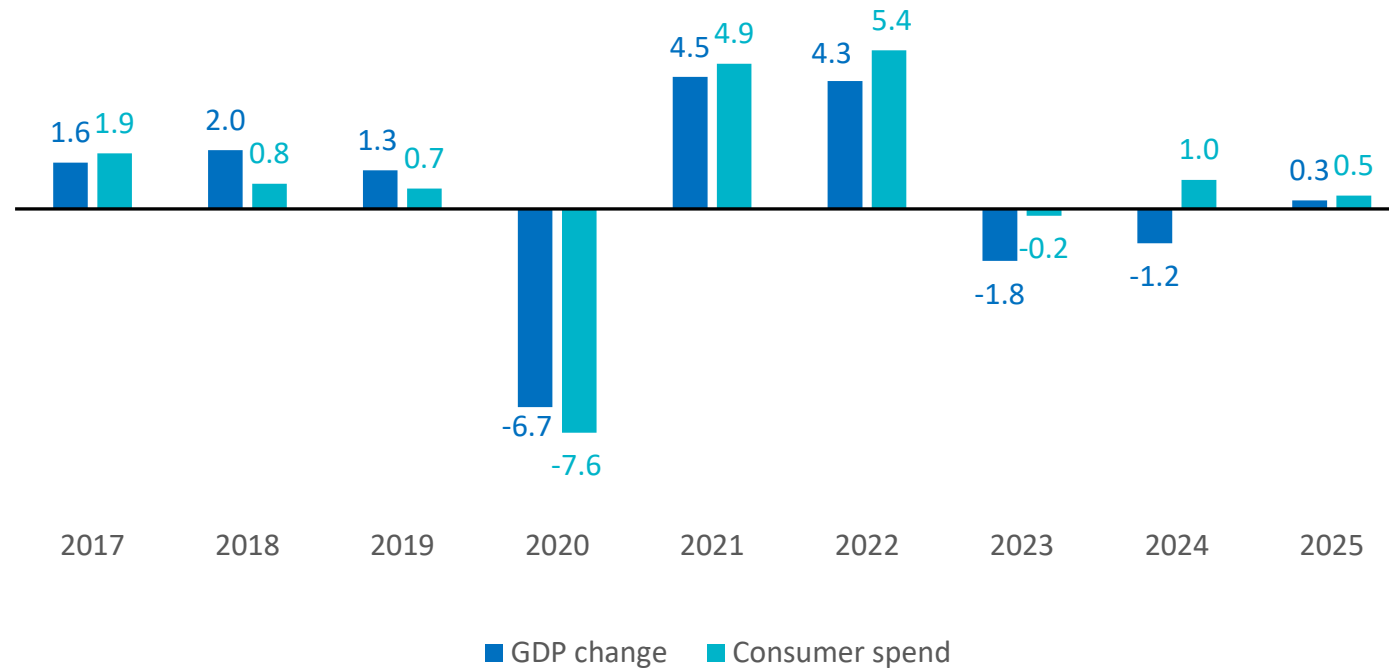


Economic indicators & General Travel Demand

Economic indicators – General travel demand



GDP and consumer spending, % annual change



Economy & population

GDP (PPP, \$) per capita
63,970

Unemployment (%)
5.7

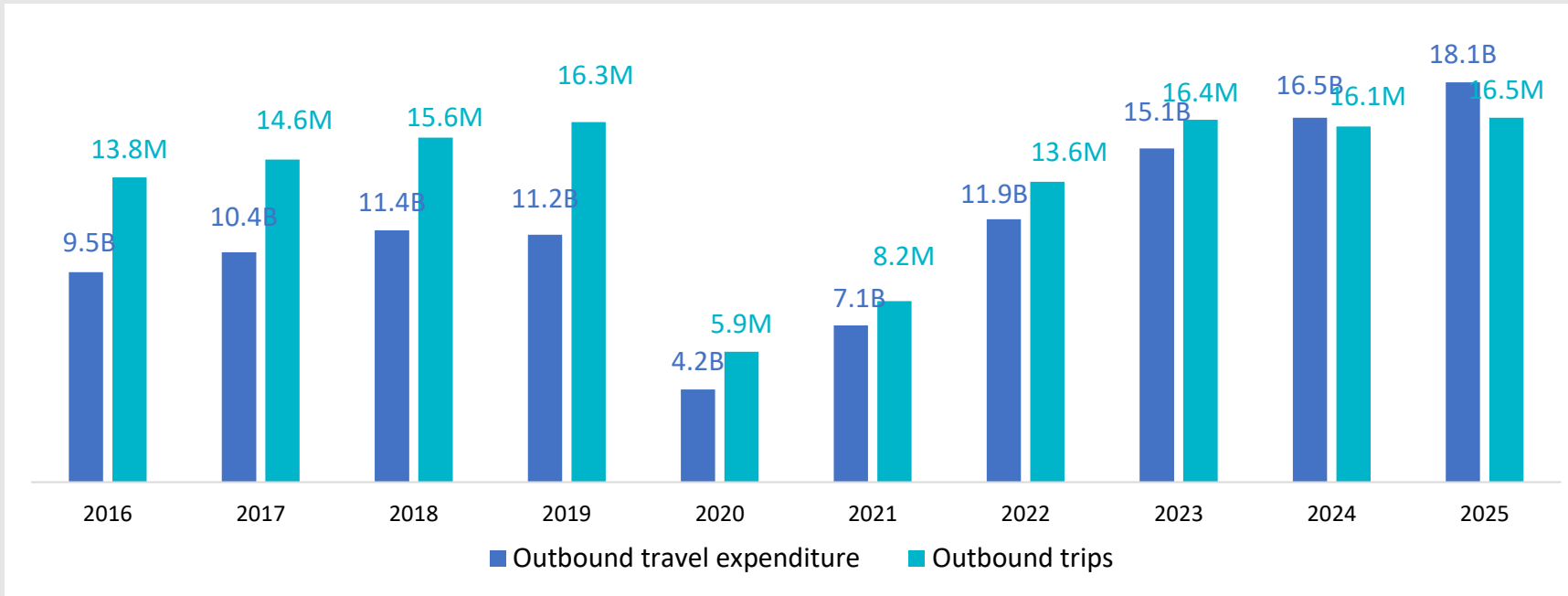
Inflation(%)
3.5

Population
9,113,574

Economic indicators – General travel demand



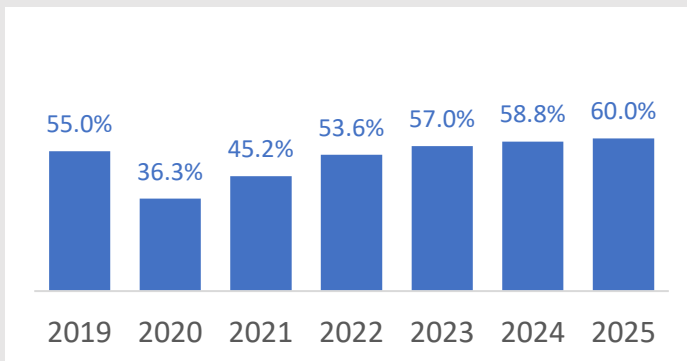
Outbound trips and travel expenditure



Outbound travel intensity
1.81 trips
per inhabitant (2025)

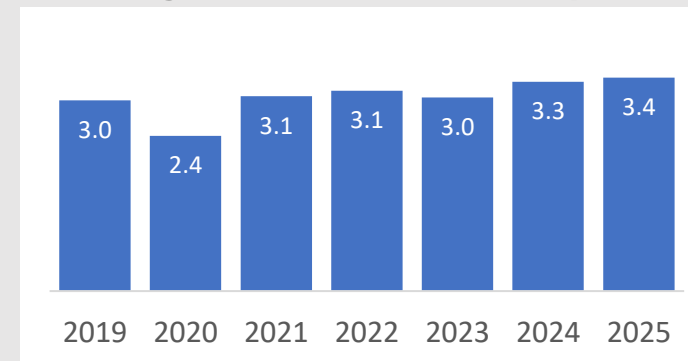
Average spend
per outbound trip (2025)
1,097 \$

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2025)
86%

Average length of stay, nights, all outbound trips





Arrivals & nights in paid accommodation

Nights in paid accommodation

2025 and 2019-2025

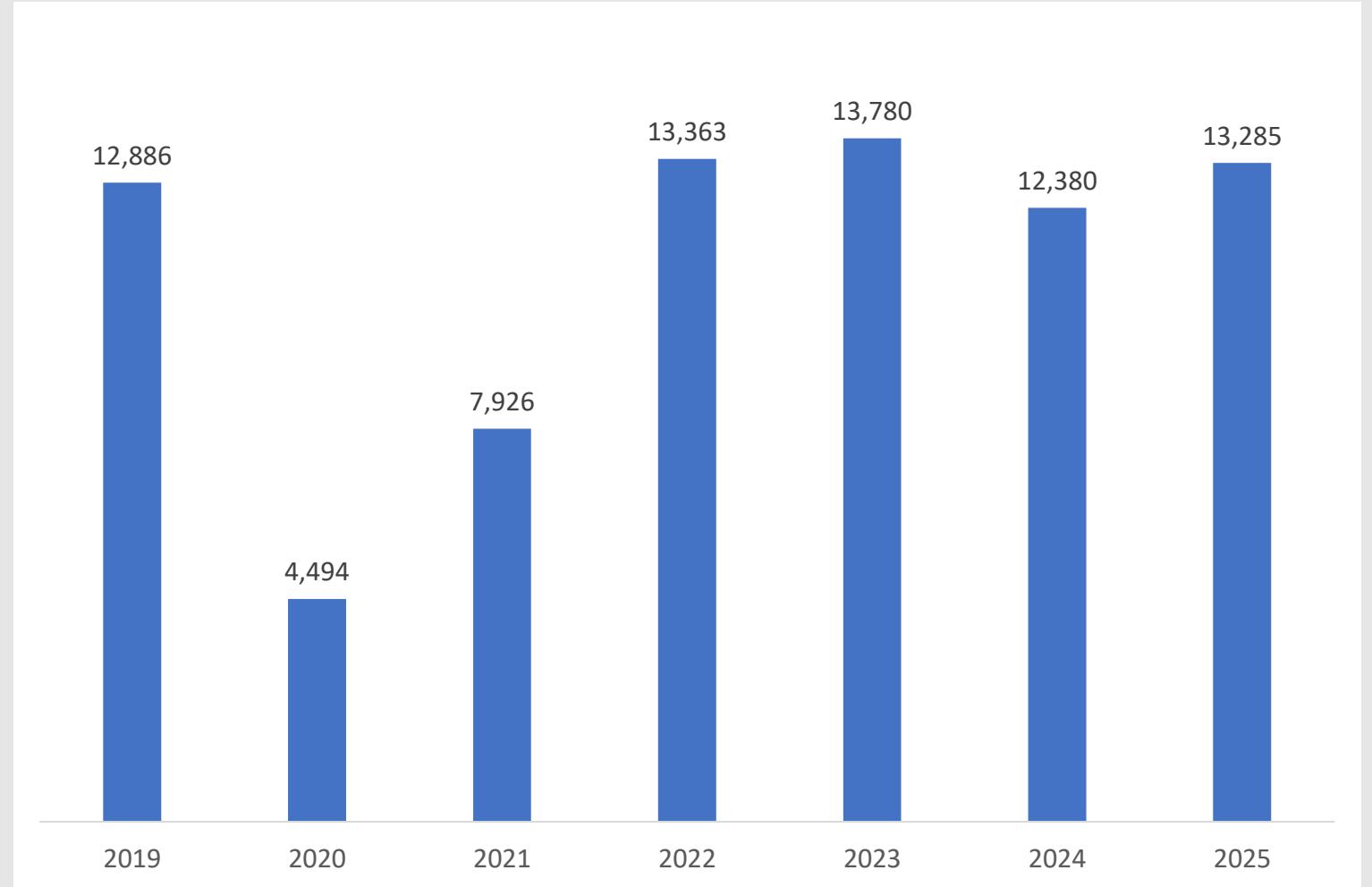


**Nights,
paid accommodation, 2025**



+7% (vs. 2024)

+3% (vs. 2019)



Arrivals in paid accommodation

2025 and 2019-2025

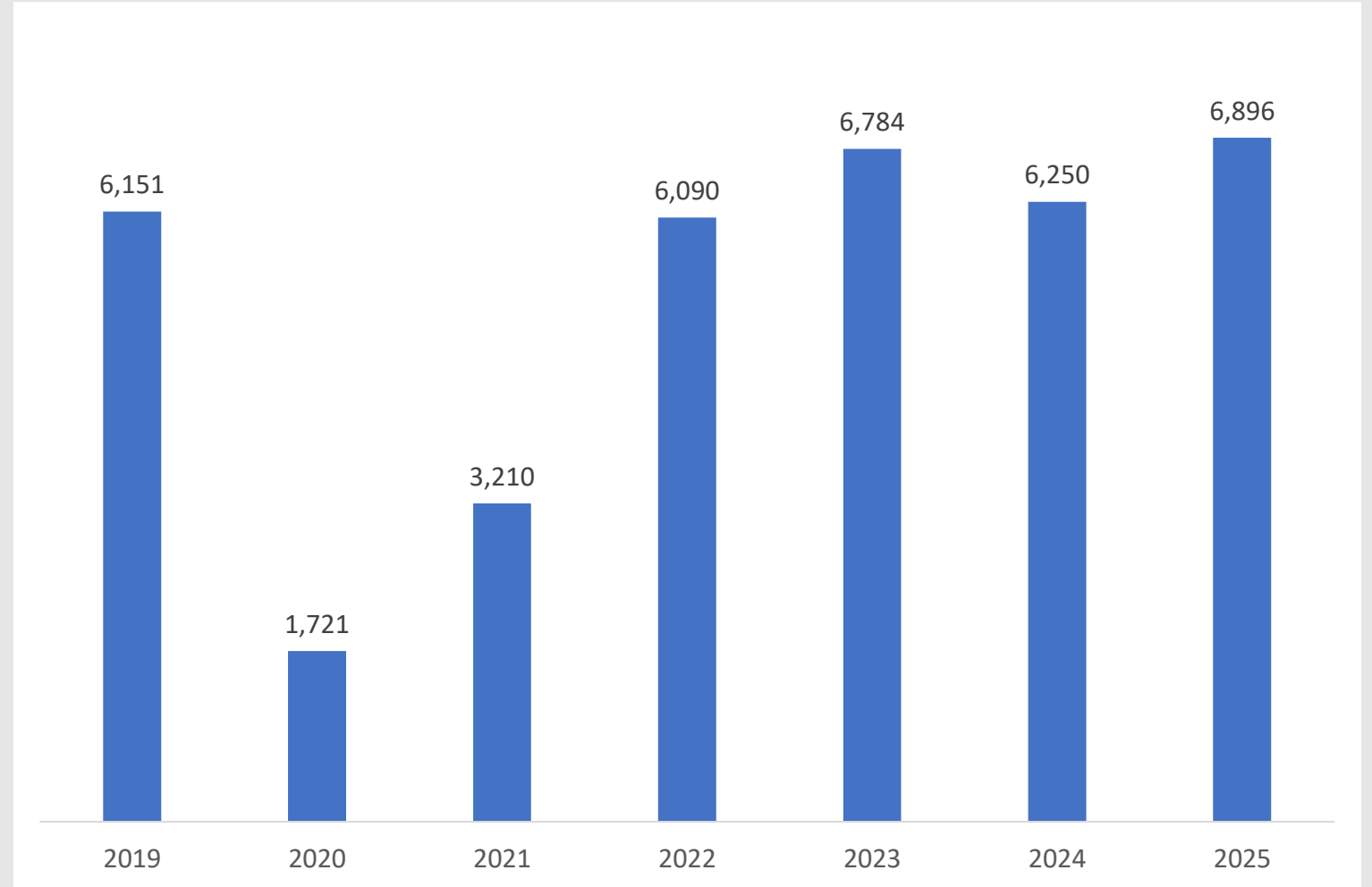


Arrivals,
paid accommodation, 2025



+10% (vs. 2024)

+12% (vs. 2019)



Length of stay, paid accommodation

2025 and 2019-2025

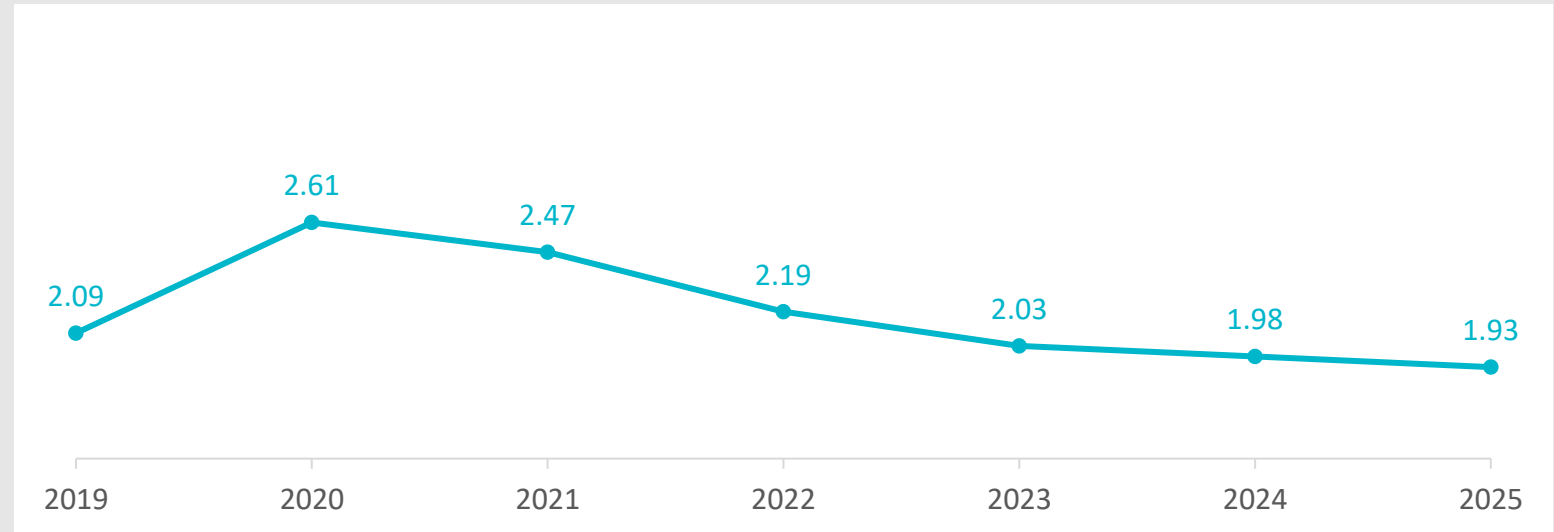


Average length of stay,
paid accommodation, 2025



-0.05 nights (vs. 2024)

-0.16 nights (vs. 2019)

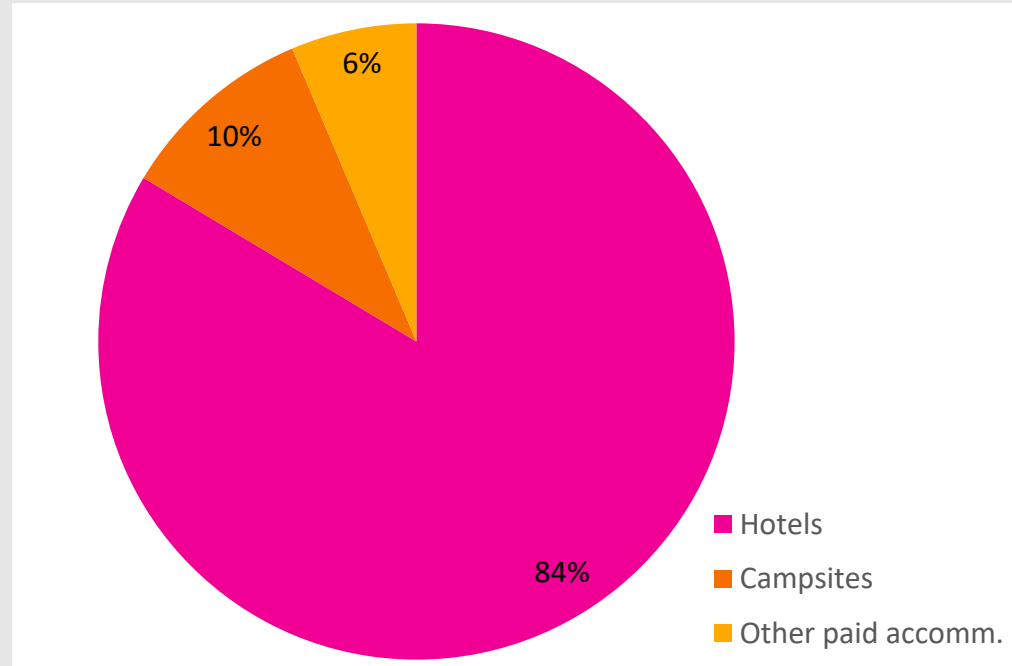


Nights & arrivals in paid accommodation

Type of accommodation, 2025

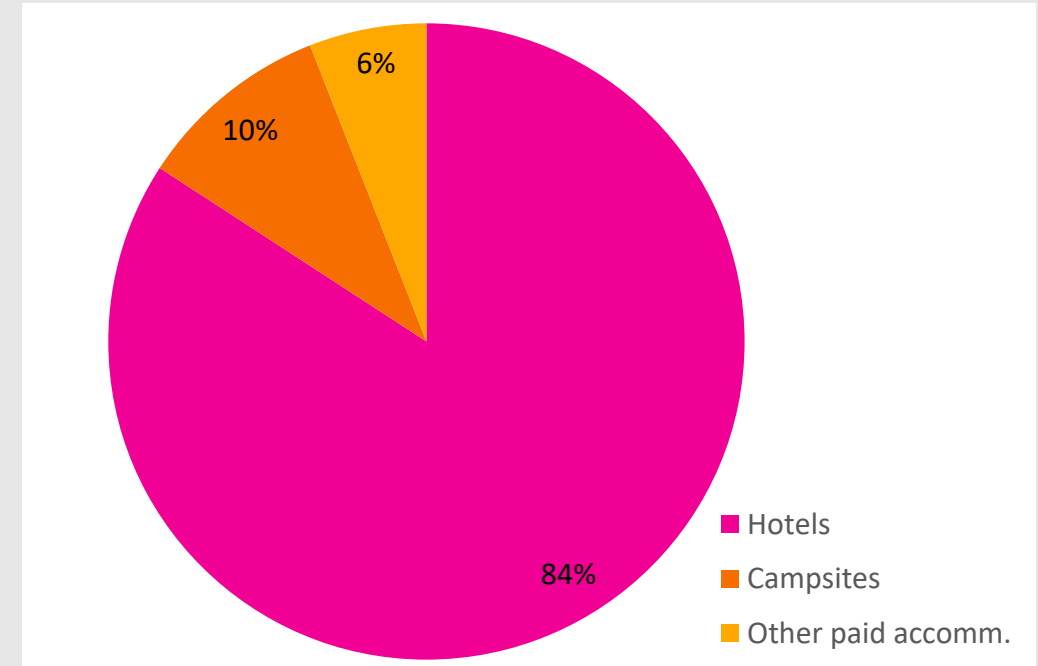


Nights,
paid accommodation, 2025



Hotels	11.106	+6% (vs. 2024)	-3% (vs. 2019)
Campsites	1.331	+8% (vs. 2024)	+86% (vs. 2019)
Other paid accomm.	848	+21% (vs. 2024)	+18% (vs. 2019)

Arrivals,
paid accommodation, 2025



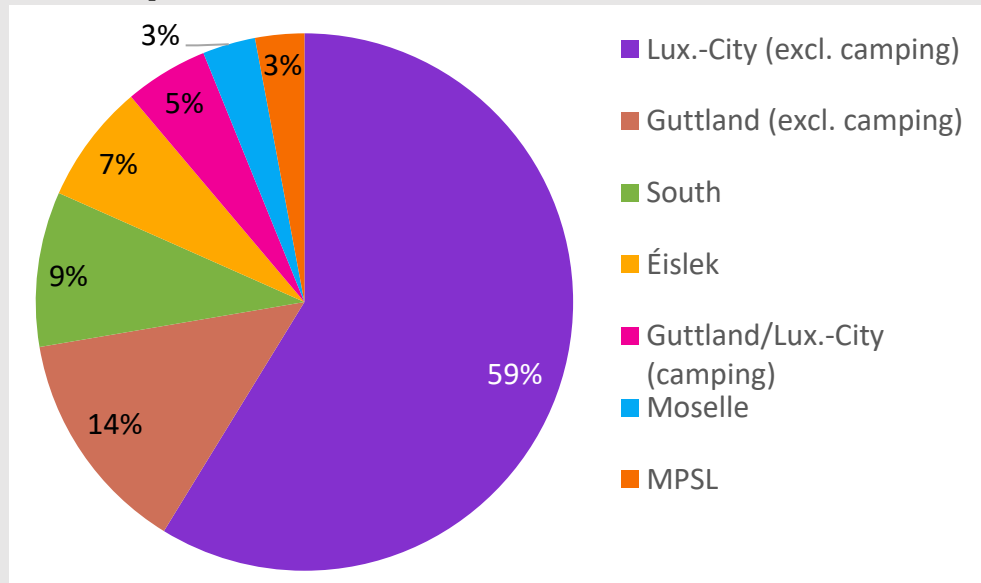
Hotels	5.805	+9% (vs. 2024)	+8% (vs. 2019)
Campsites	680	+14% (vs. 2024)	+72% (vs. 2019)
Other paid accomm.	411	+35% (vs. 2024)	+10% (vs. 2019)

Nights & arrivals in paid accommodation

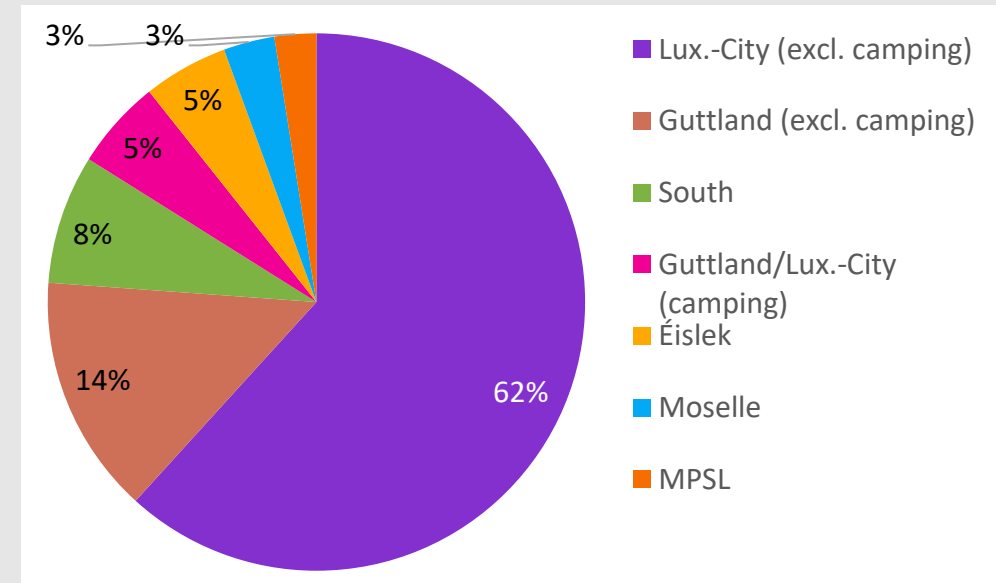
Regions, 2025



Nights, paid accommodation, 2025



Arrivals, paid accommodation, 2025



Lux.-City (excl. camping)	7.806	+22% (vs. 2024)	+15% (vs. 2019)
Guttland (excl. camping)	1.802	-6% (vs. 2024)	-6% (vs. 2019)
South	1.239	-13% (vs. 2024)	-44% (vs. 2019)
Éislek	955	-6% (vs. 2024)	+19% (vs. 2019)
Guttland/Lux.-City (camping)	668	+6% (vs. 2024)	+68% (vs. 2019)
Moselle	423	+3% (vs. 2024)	-12% (vs. 2019)
MPSL	392	-32% (vs. 2024)	+48% (vs. 2019)

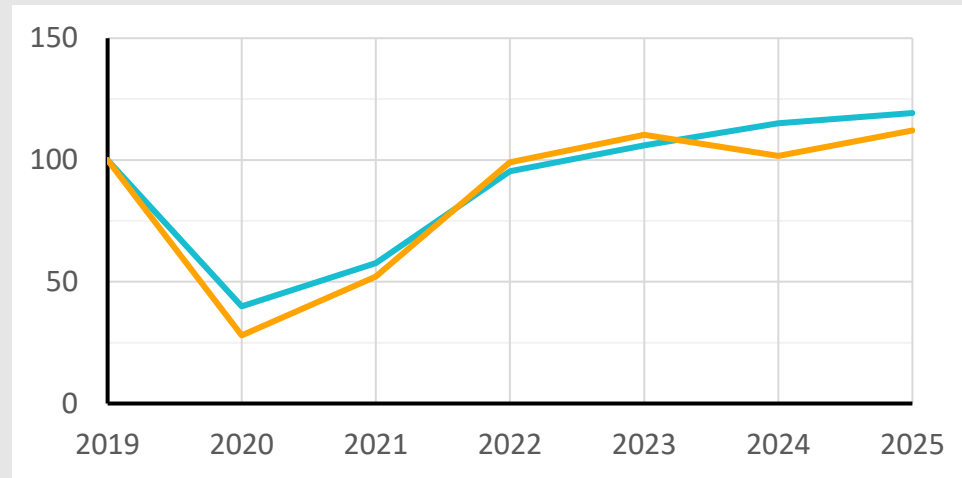
Lux.-City (excl. camping)	4.258	+26% (vs. 2024)	+22% (vs. 2019)
Guttland (excl. camping)	993	-8% (vs. 2024)	+10% (vs. 2019)
South	536	-12% (vs. 2024)	-35% (vs. 2019)
Guttland/Lux.-City (camping)	372	+7% (vs. 2024)	+32% (vs. 2019)
Éislek	352	-6% (vs. 2024)	+8% (vs. 2019)
Moselle	212	-5% (vs. 2024)	+0% (vs. 2019)
MPSL	173	-27% (vs. 2024)	+43% (vs. 2019)

Arrivals in paid accommodation

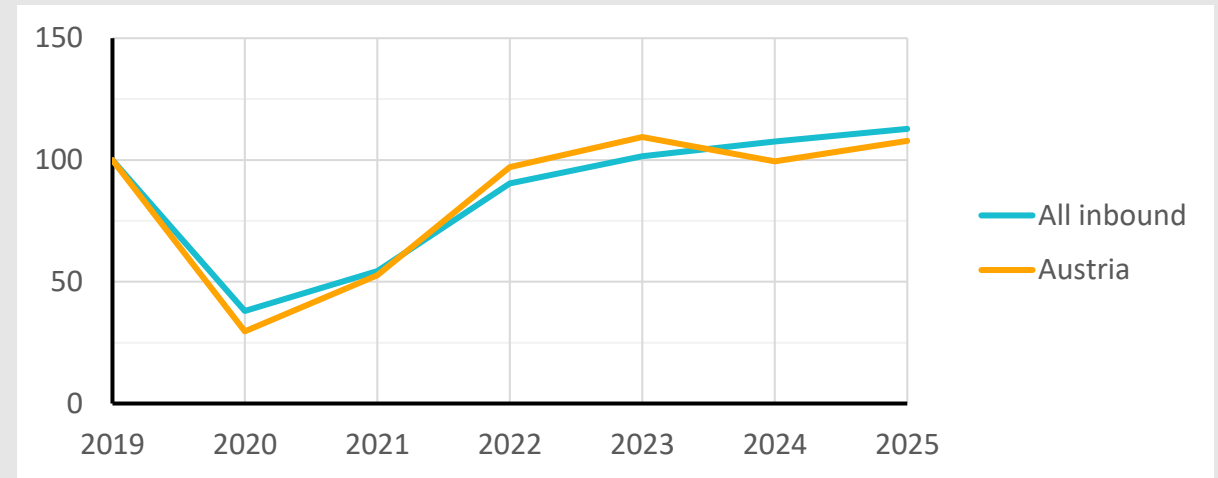
Trends 2019-2025



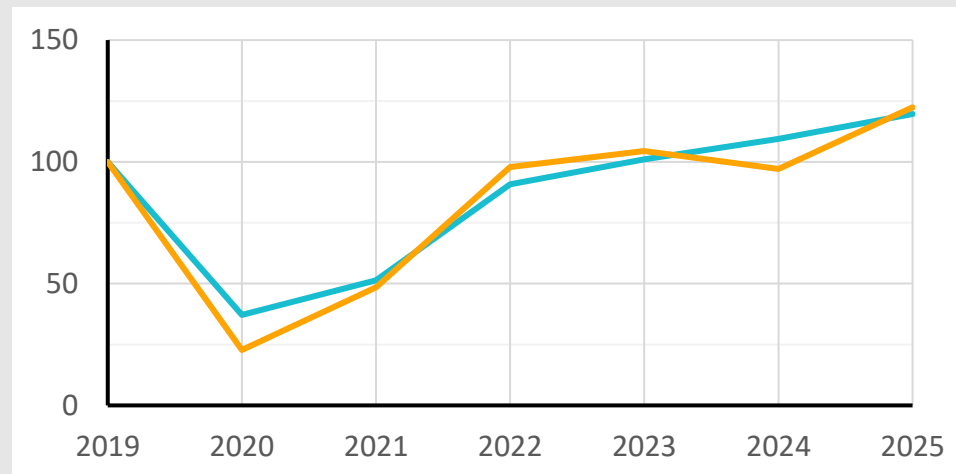
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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



Short-term rentals

2025 and 2019-2025



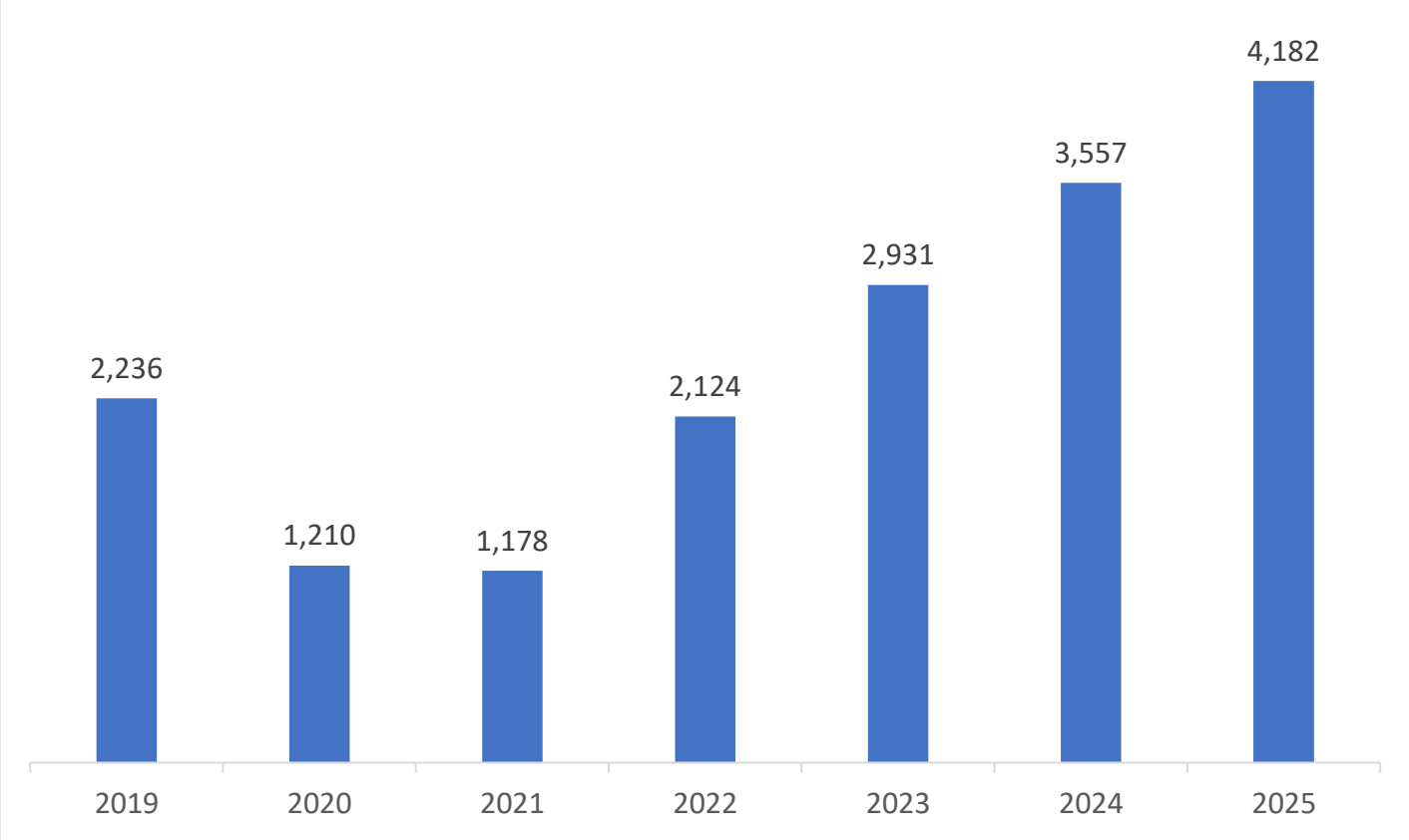
Nights,
Short-term rentals, 2025



+18% (vs. 2024)

+87% (vs. 2019)

Nights,
Short-term rentals, 2019-2025





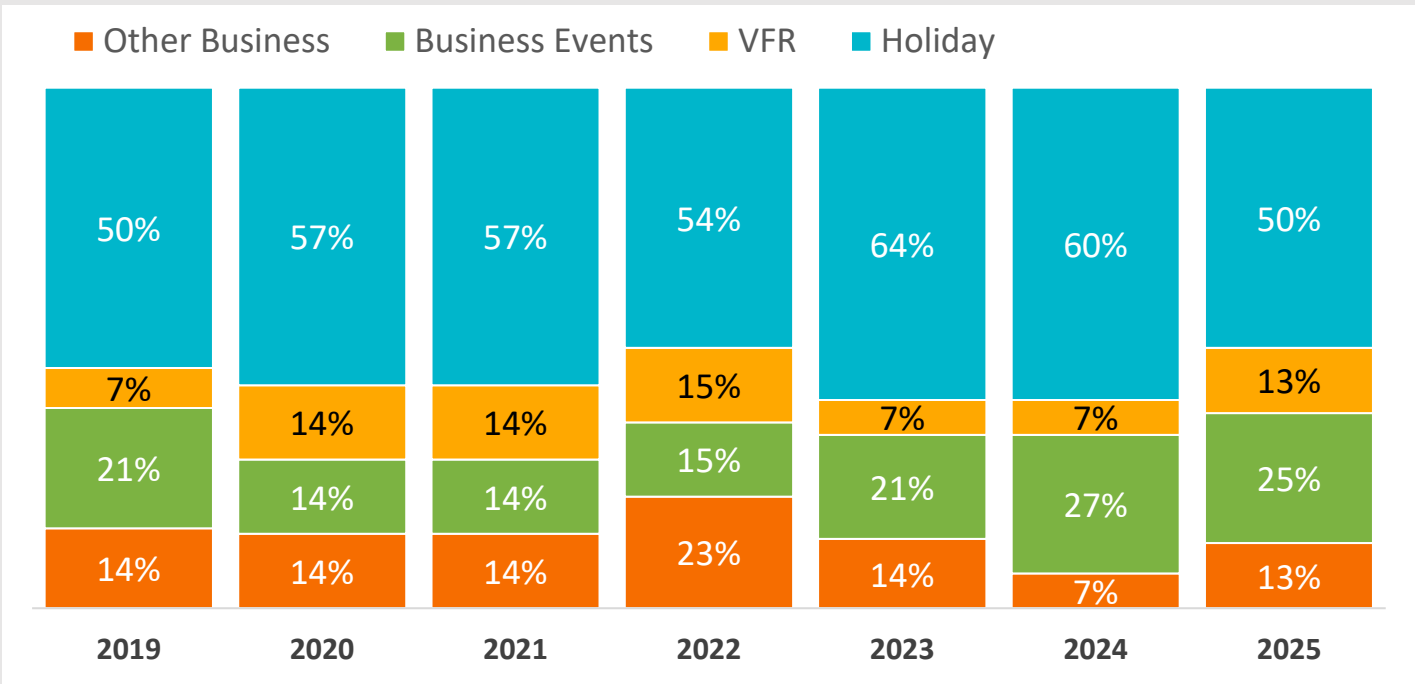
Characteristics of inbound trips

Austrian trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2019-2025

Austrian trips to Luxembourg, 2019-2025



2025

Austria to
Luxembourg

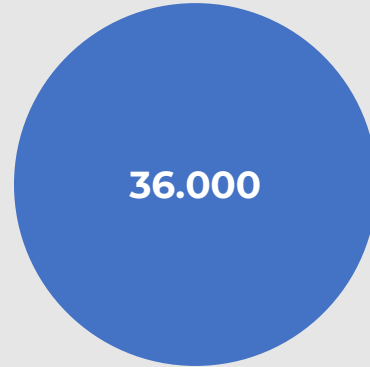
	Austria to Luxembourg	Europe to Luxembourg
Holiday	50%	62%
VFR	13%	12%
Business Events	25%	17%
Other Business	14%	8%

Inbound same-day trips to Luxembourg

2025



**Number of inbound
same-day trips, 2025 (estimate)**



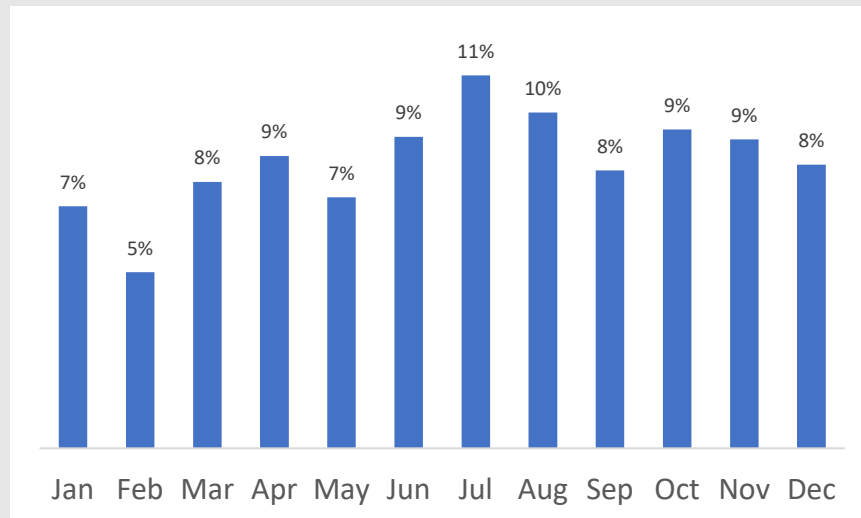
-3% (vs. 2024)

**Average length
of same-day trips**



+0,8 h (vs. 2024)

**Seasonality
% of same-day trips**



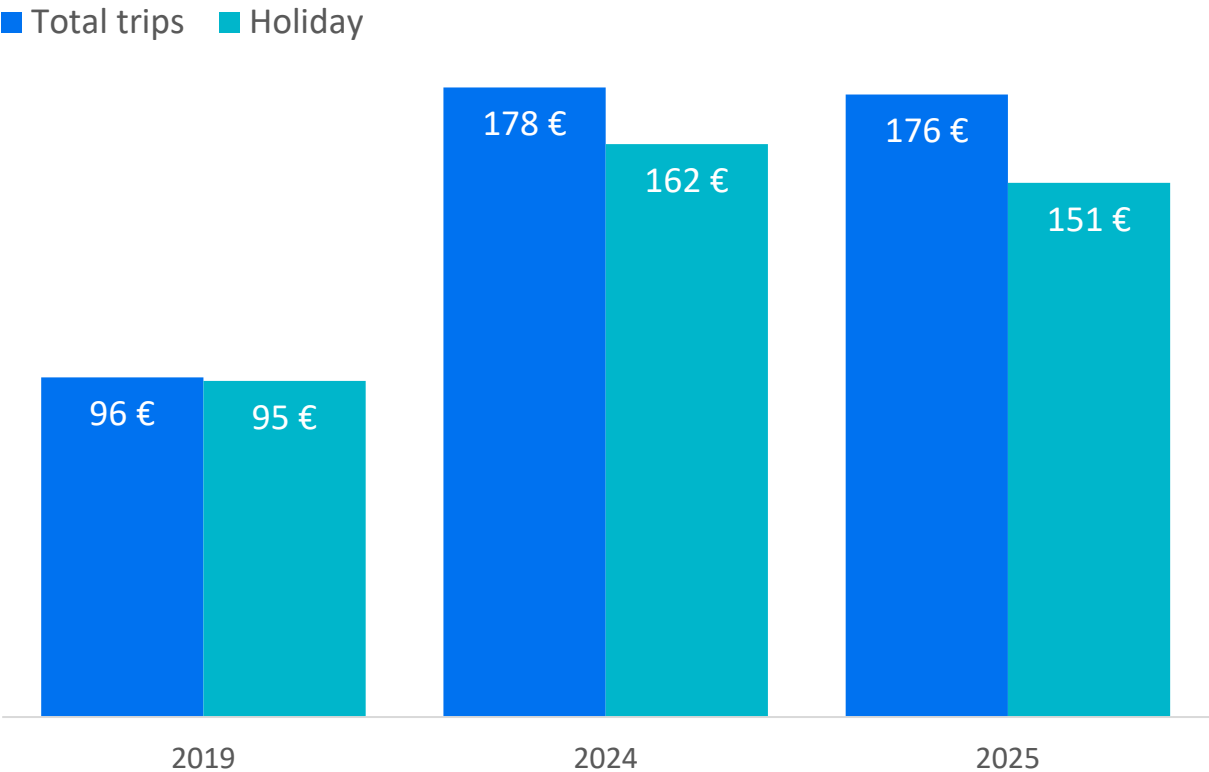


Travel behaviour of inbound leisure visitors

Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)



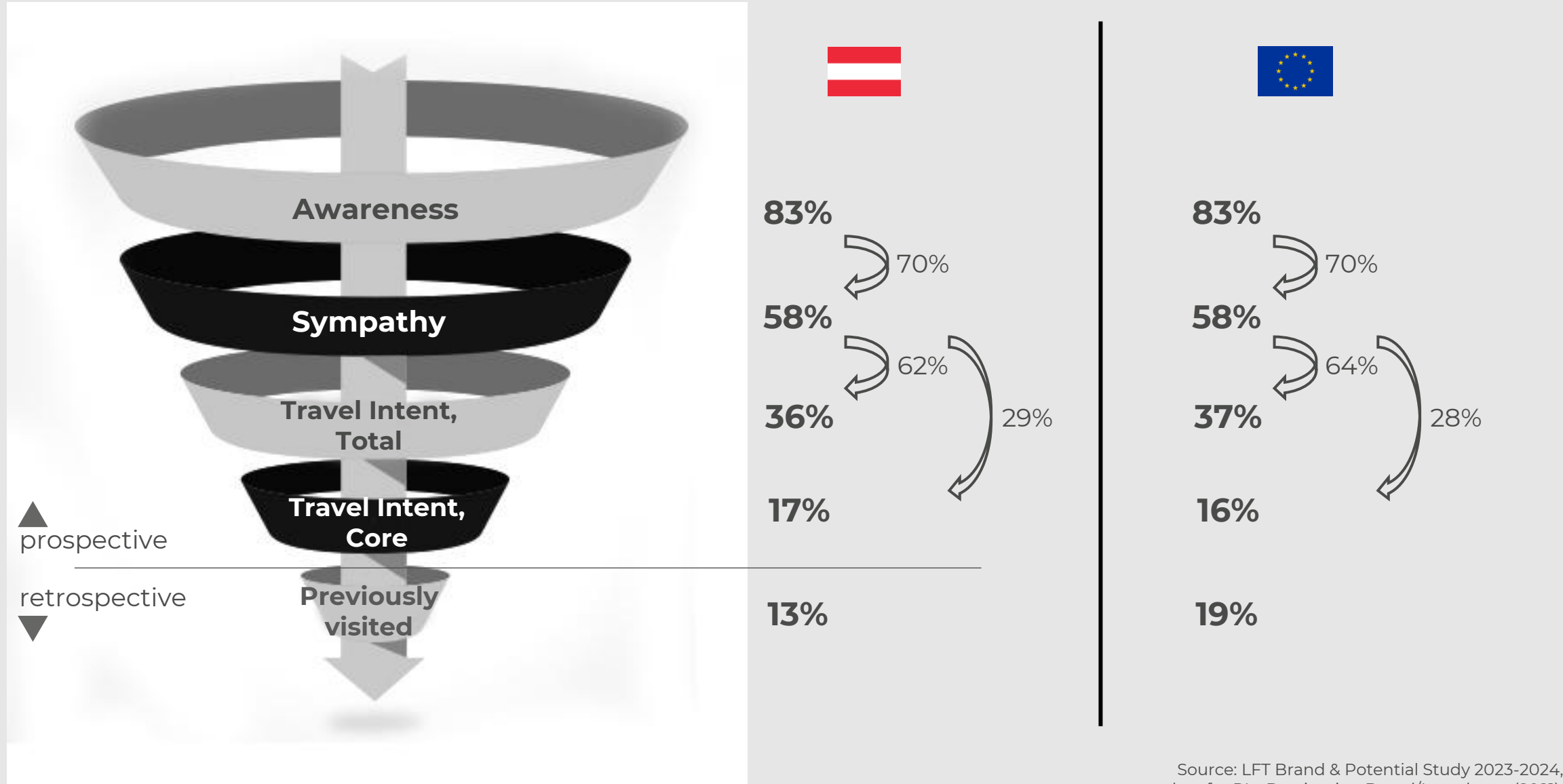
	2025	Austria to Luxembourg	All inbound to Luxembourg
Spend/day/pers. on all trips		176€	196€
Spend/day/pers. on holiday trips		151€	175€



Target segments, Brand & Growth Potential

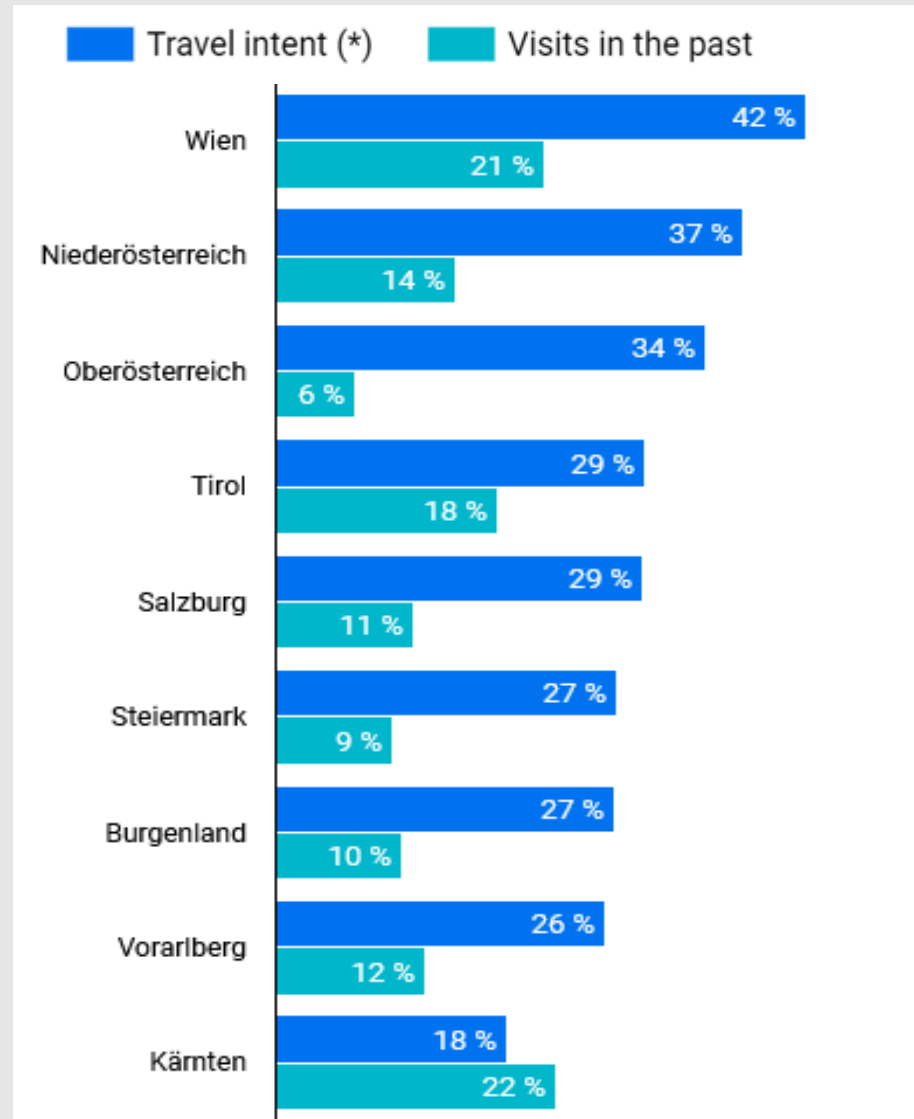
Destination Luxembourg - Brand Funnel 2024

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	74%
Nature	3	2	71%
Resting/Relaxation	1	3	71%
Sightseeing	4	4	70%
Immersive travel	6	5	69%
City	5	6	67%
Architecture/townscapes	7	7	67%
Fun/entertainment	8	8	65%
Family	12	9	61%
Exchanging with locals	13	10	60%
Castles	9	11	59%
History/Unesco	10	12	59%
Culture	11	13	59%
Learning/new skills	14	14	56%
Events	16	15	55%
Sustainability	15	16	55%
Hiking	17	17	53%
Nightlife (**)	20	18	53%
Adventure/action	19	19	52%
Travelling by train	18	20	49%
Active-sports	27	21	49%
Wellness	25	22	48%
Wine	21	23	47%
Countryside	22	24	44%
Shopping	23	25	43%
Cycling	31	26	43%
Luxury	24	27	43%
Remembrance	26	28	42%
Camping	29	29	39%
Industrial heritage	28	30	39%
Film locations	30	31	38%
MTB	32	32	32%
Motorcycling	33	33	29%

(*) 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
Culinary	3	1	41%
City	1	2	41%
Architecture/townscapes	4	3	36%
Culture	6	4	33%
Castles	7	5	31%
Luxury	9	5	31%
Nature	5	7	31%
Resting/Relaxation	2	8	29%
Shopping	10	9	24%
Family	8	10	23%
History/Unesco	12	11	22%
Fun/entertainment	13	12	22%
Nightlife (**)	14	13	22%
Wine	15	14	20%
Active-sports	21	15	19%
Hiking	11	16	19%
Events	23	17	18%
Cycling	20	18	18%
Wellness	16	19	18%
Sustainability	18	20	17%
Adventure/action	22	21	15%
Remembrance	26	22	15%
Countryside	17	23	15%
Camping	19	24	14%
Industrial heritage	24	25	14%
MTB	25	26	10%

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

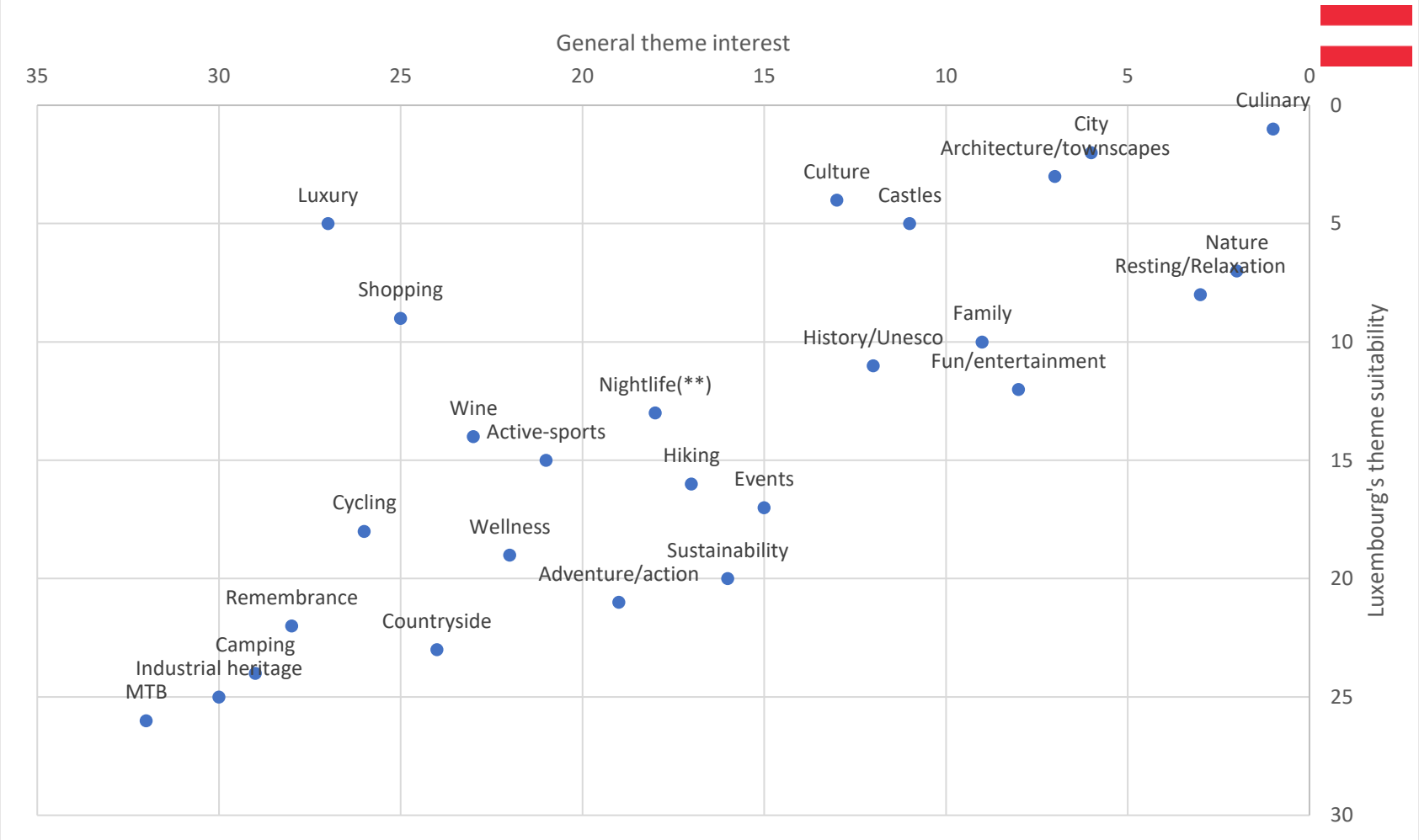
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

(**) 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	42%
of high quality	3	2	39%
clean	2	3	37%
welcoming, hospitable	4	4	33%
open-minded, tolerant, international	6	5	32%
exclusive, luxurious	8	6	31%
authentic, real	5	7	30%
attractive, appealing	7	8	25%
varied, diversified	12	9	25%
dynamic, modern	9	10	25%
service oriented	10	11	22%
lively, trendy	13	12	20%
not overcrowded / insider tip	14	13	20%
surprising	11	14	18%
sustainable	15	15	16%
affordable	16	16	10%

(*) 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.

Spontaneous associations with Luxembourg



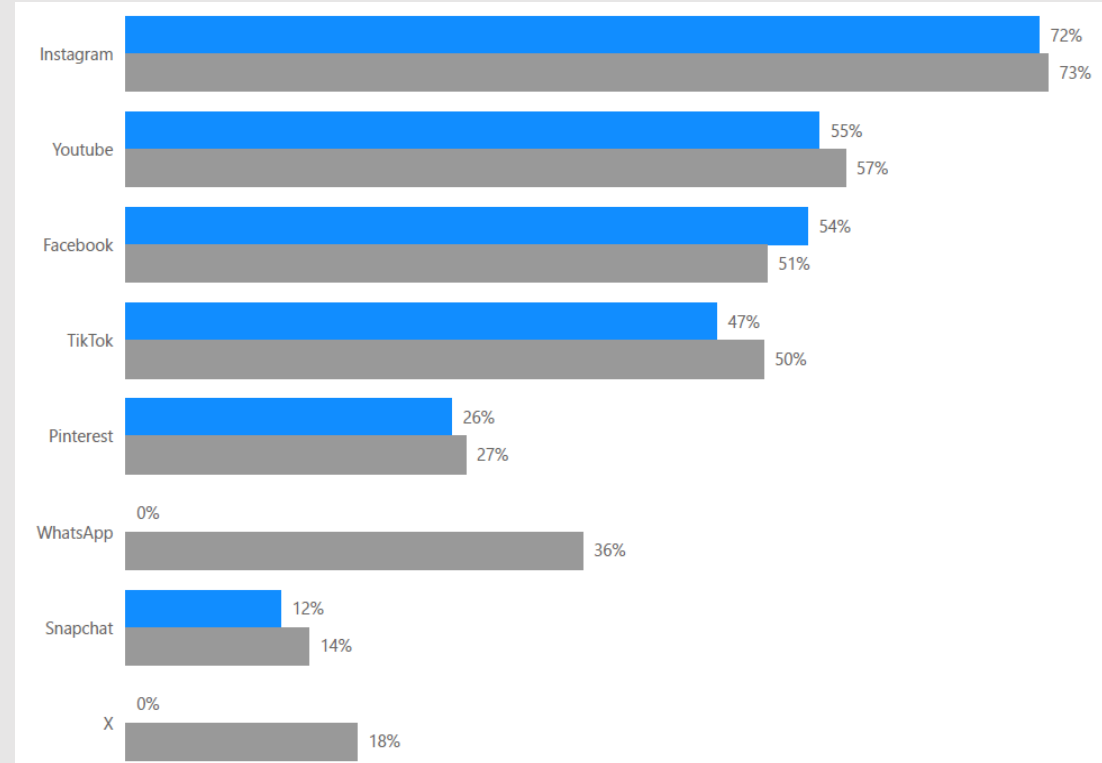
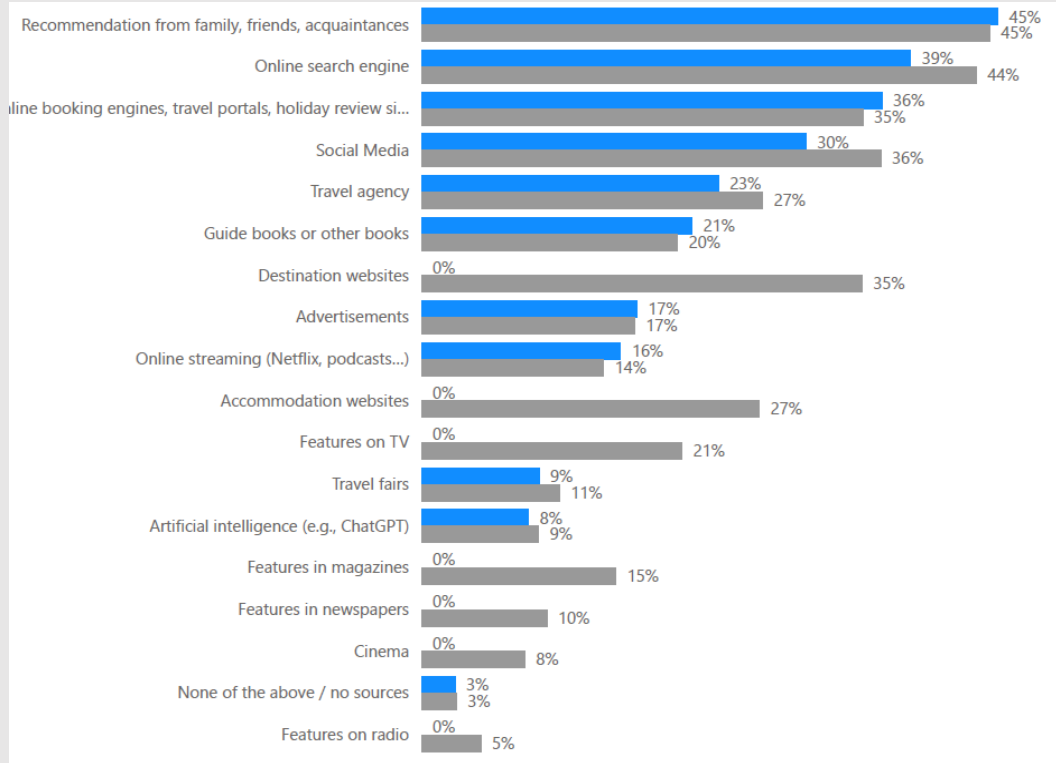
Trip organisation and preferences (1)

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

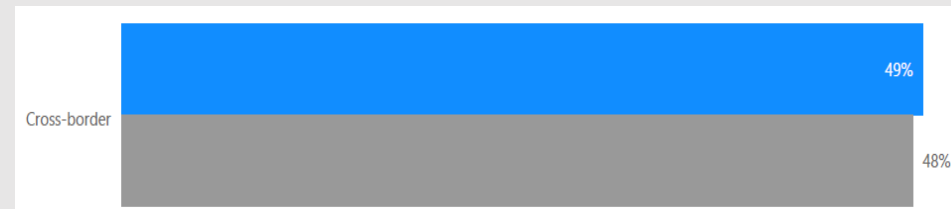
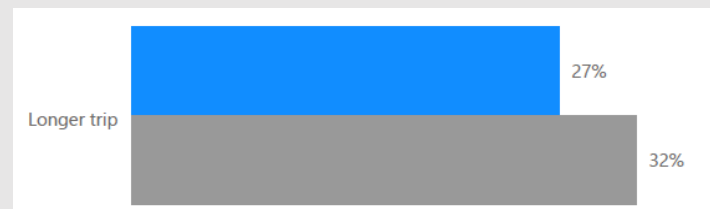


Austria
All inbound

Preferred sources of travel inspiration



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

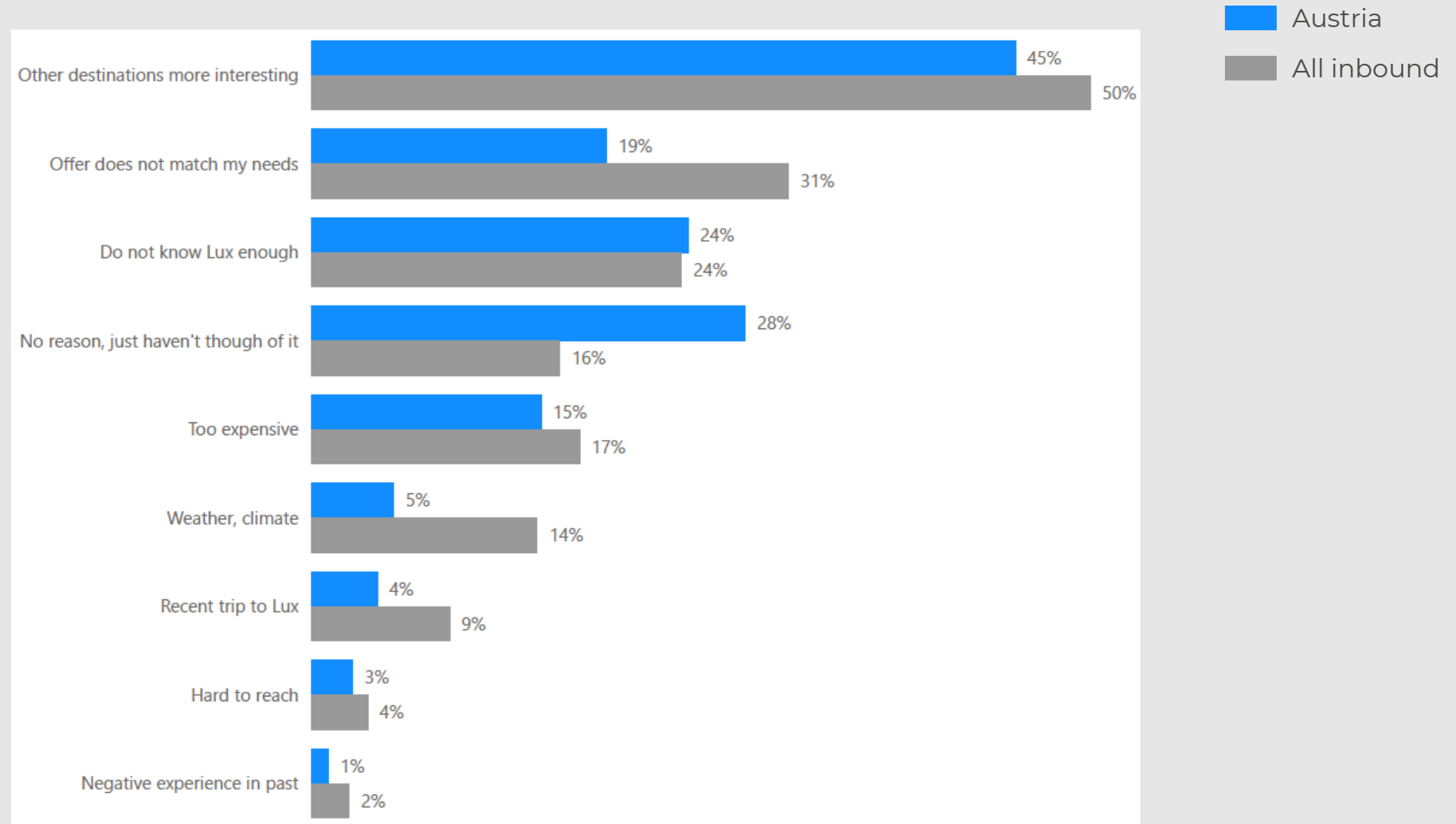


Trip organisation and preferences (2)

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



Reasons for not considering Luxembourg as a destination

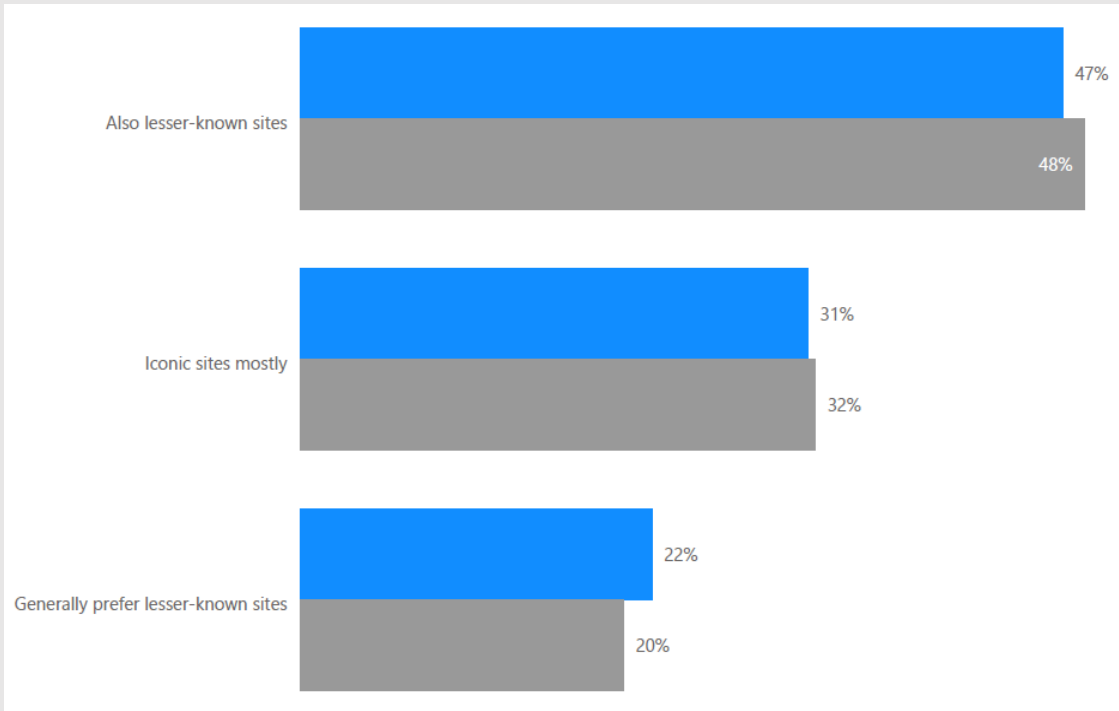


Trip organisation and preference (3)

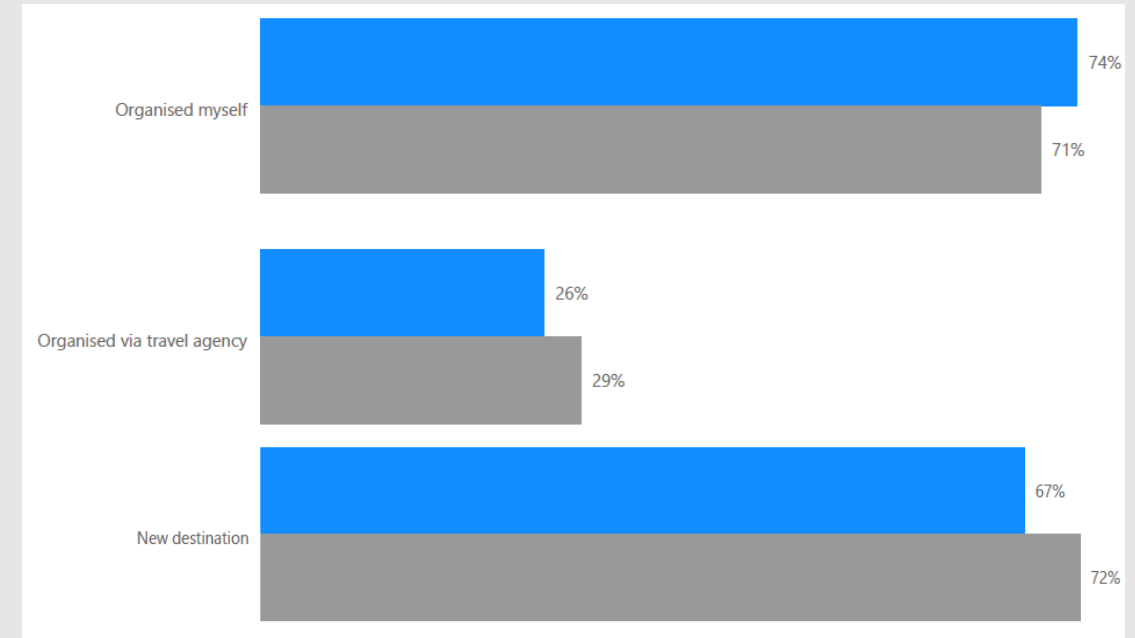
— Average **European source markets**, total vs. Austria



General preference for visiting iconic vs. lesser-known sites



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



■ Austria
■ All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



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