



Luxembourg for Tourism

Market profile

GERMANY

2025

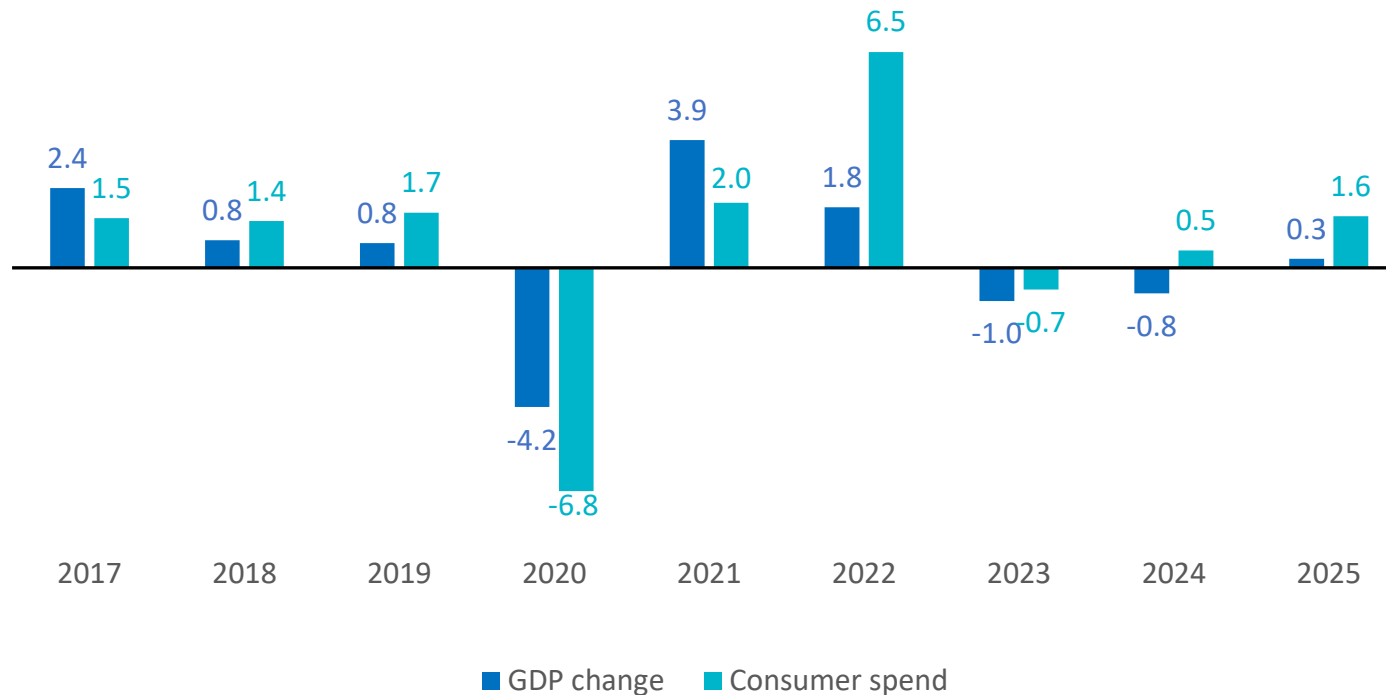


Economic indicators & General Travel Demand

Economic indicators – General travel demand



GDP and consumer spending, % annual change



Economy & population

GDP (PPP, \$) per capita
62,824

Unemployment (%)
6.3

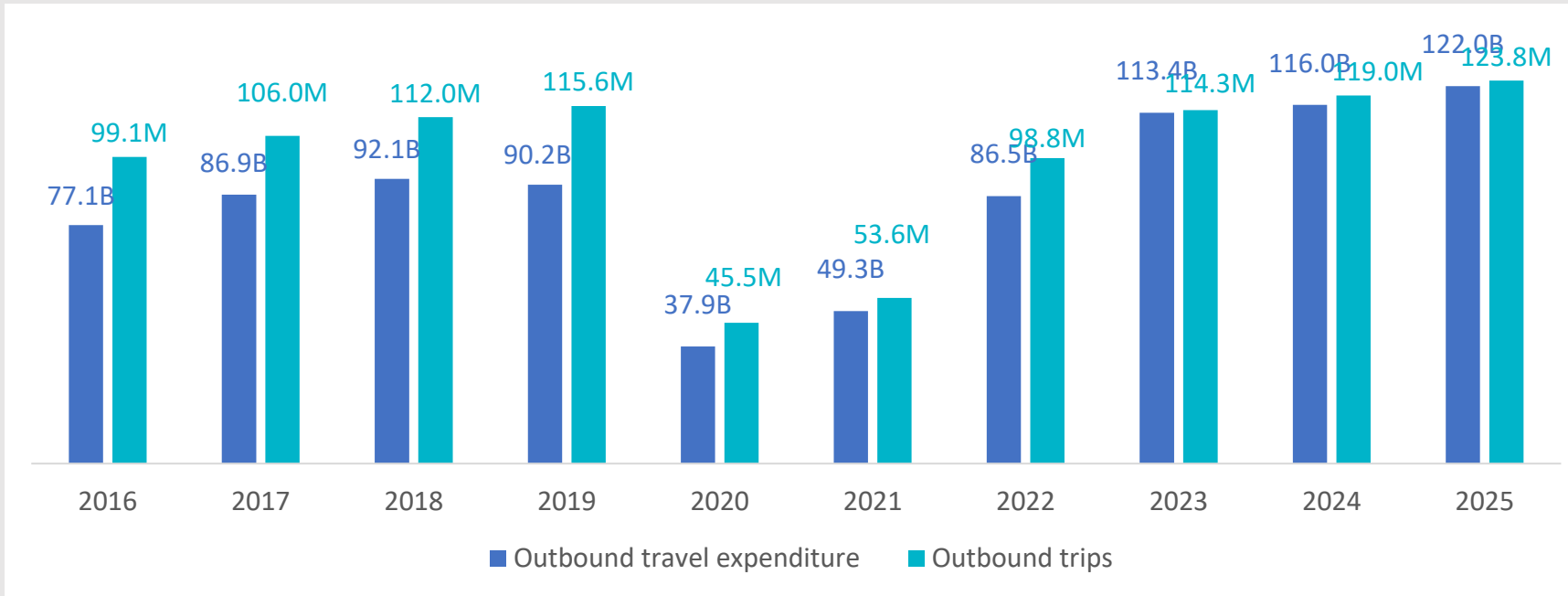
Inflation(%)
2.2

Population
84,075,075

Economic indicators – General travel demand



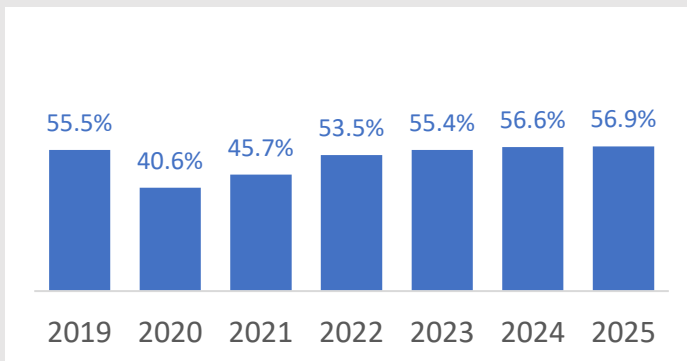
Outbound trips and travel expenditure



Outbound travel intensity
1.47 trips
per inhabitant (2025)

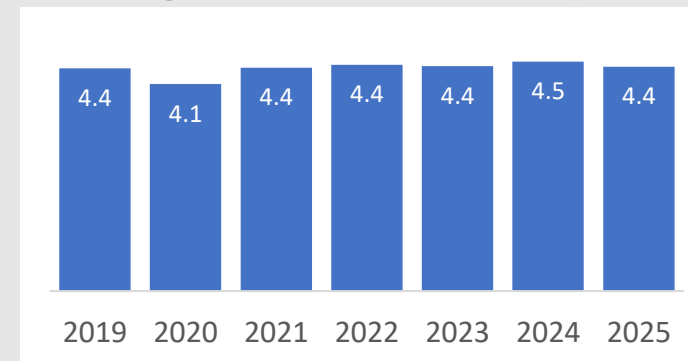
Average spend
per outbound trip (2025)
985 \$

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2025)
84%

Average length of stay, nights, all outbound trips





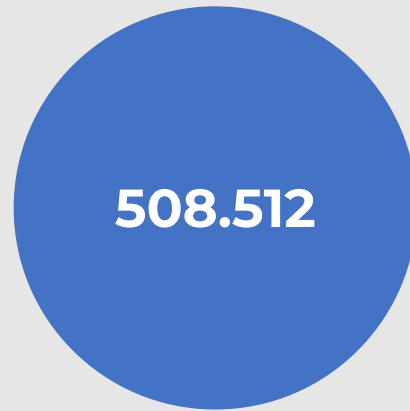
Arrivals & nights in paid accommodation

Nights in paid accommodation

2025 and 2019-2025

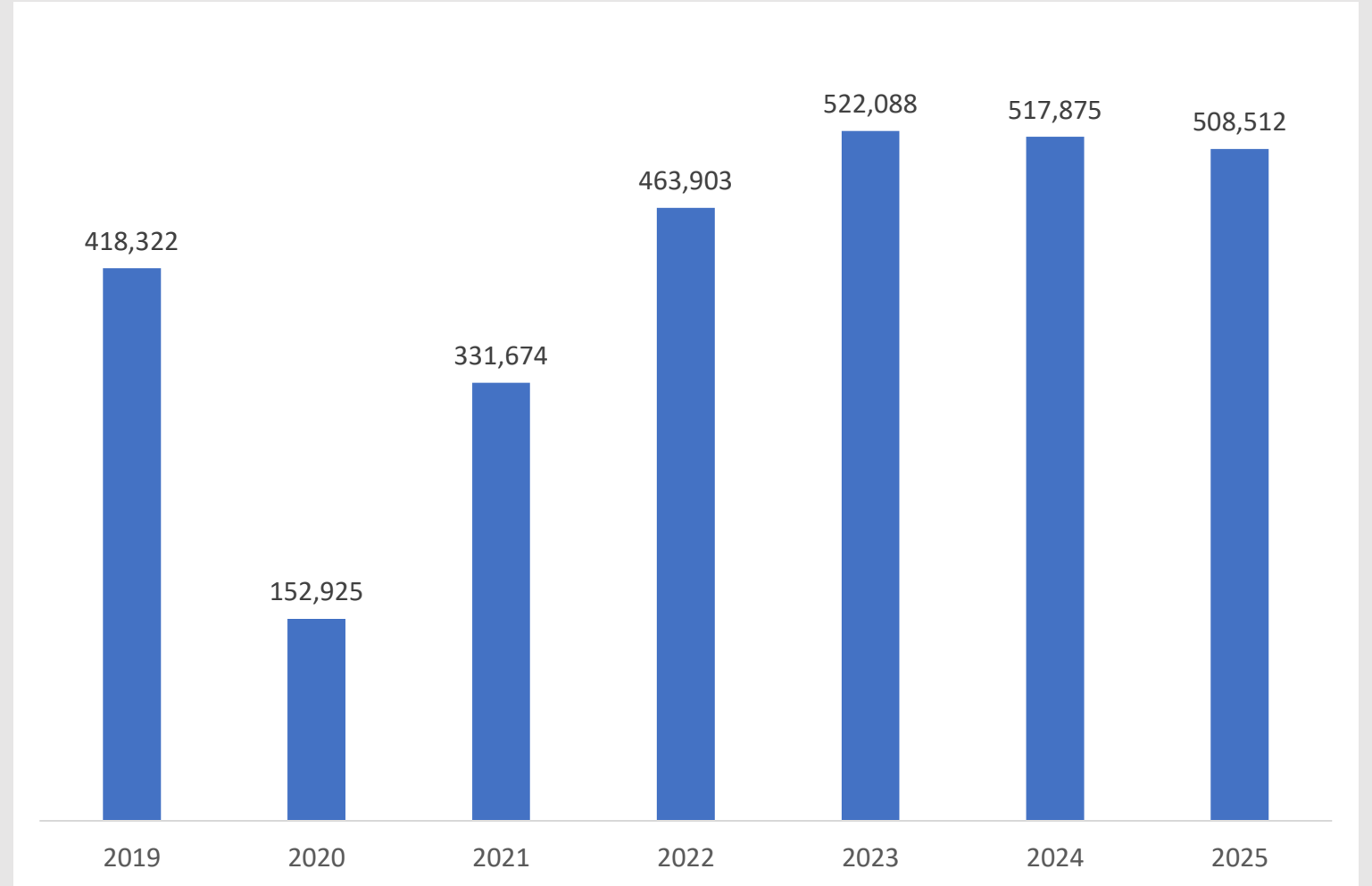


**Nights,
paid accommodation, 2025**



-2% (vs. 2024)

+22% (vs. 2019)

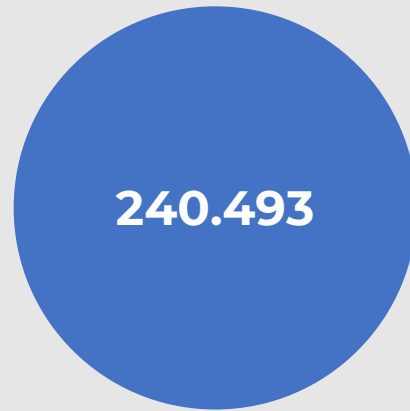


Arrivals in paid accommodation

2025 and 2019-2025

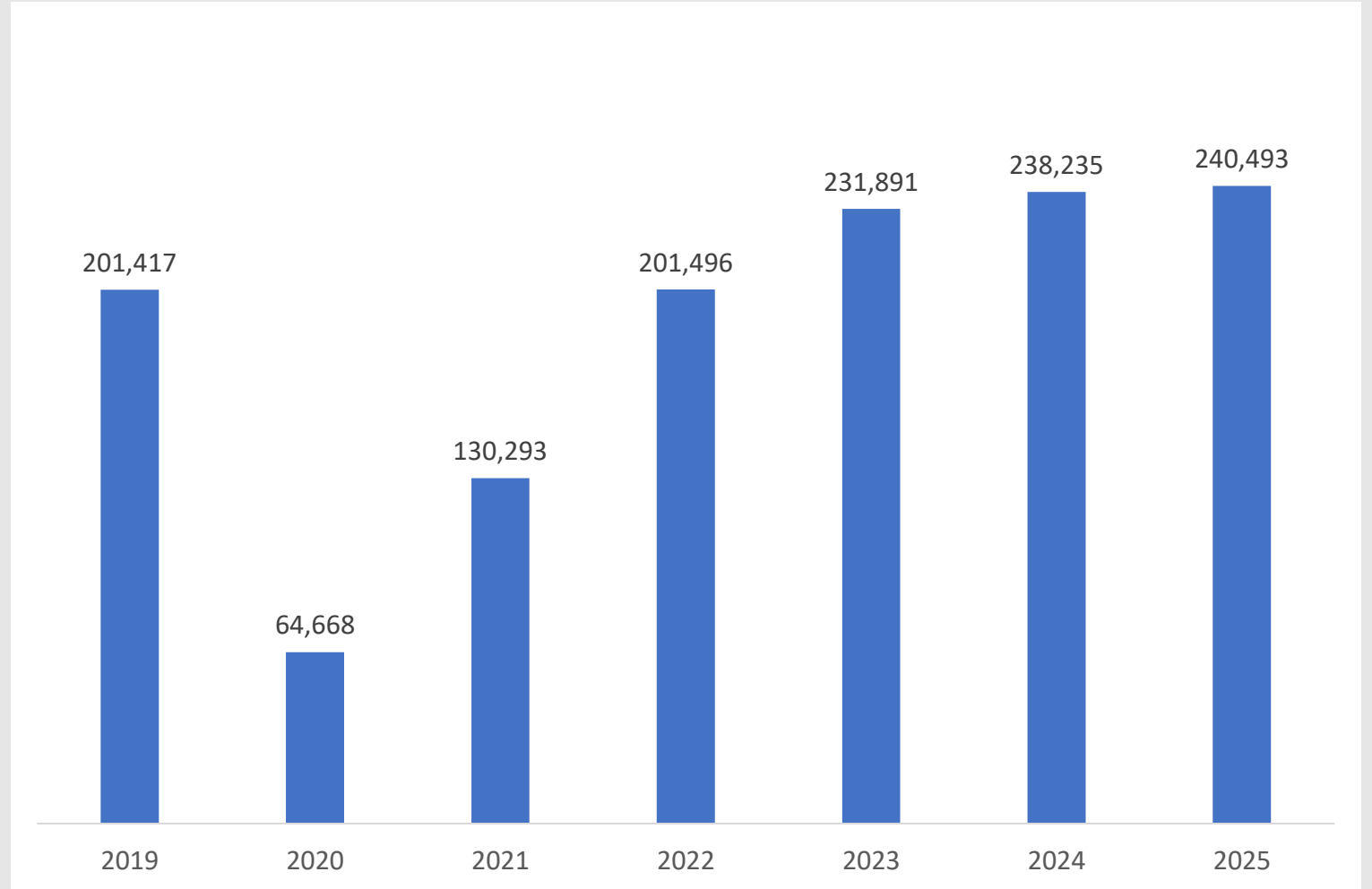


Arrivals,
paid accommodation, 2025



+1% (vs. 2024)

+19% (vs. 2019)



Length of stay, paid accommodation

2025 and 2019-2025

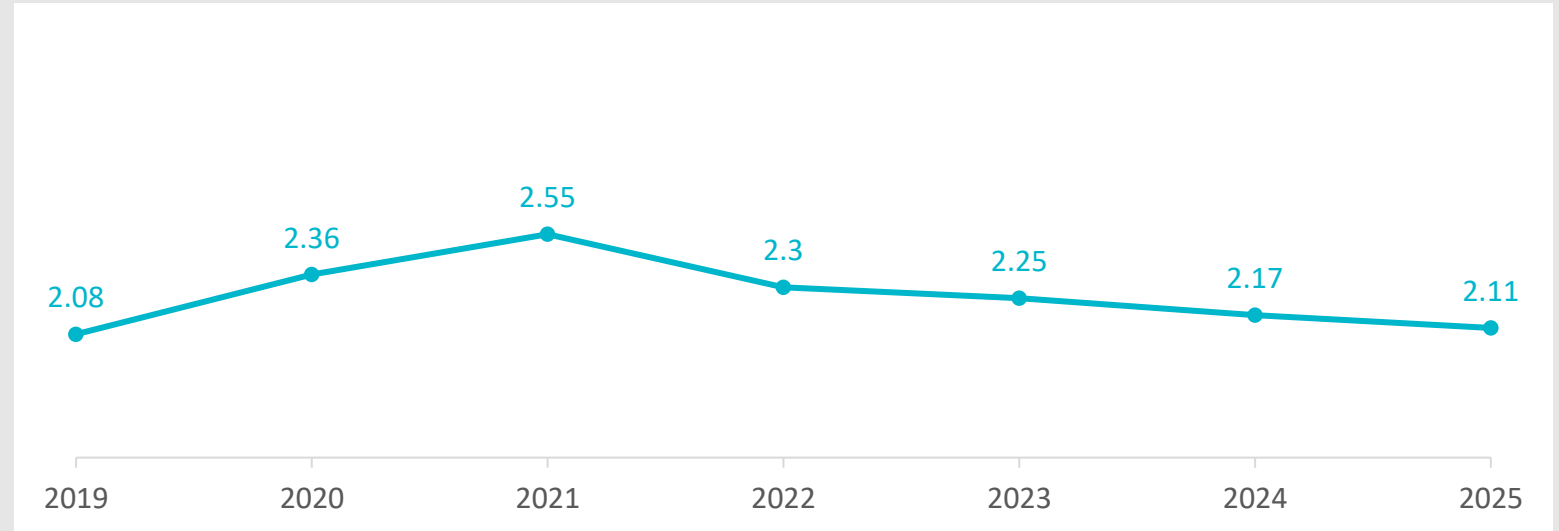


Average length of stay,
paid accommodation, 2025



-0.06 nights (vs. 2024)

+0.03 nights (vs. 2019)

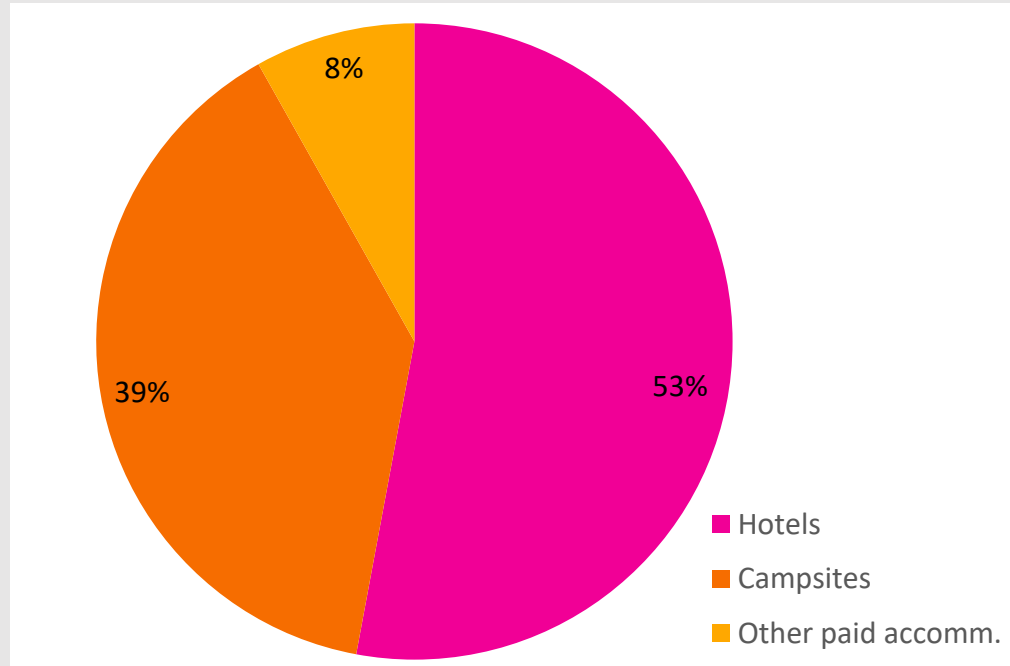


Nights & arrivals in paid accommodation

Type of accommodation, 2025

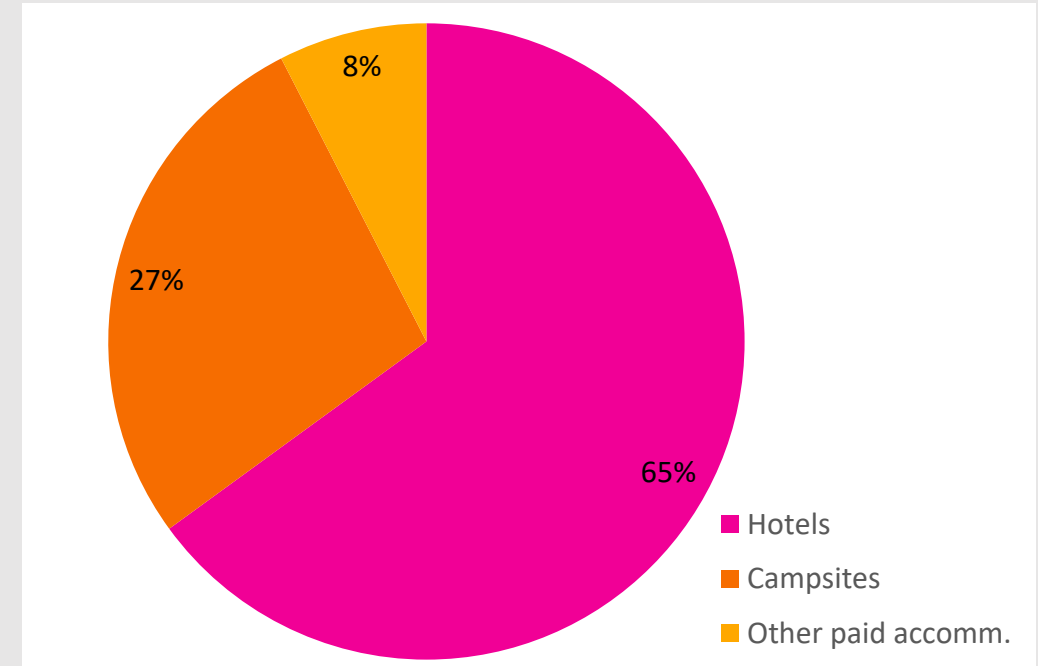


Nights,
paid accommodation, 2025



Hotels	269.158	-6% (vs. 2024)	-1% (vs. 2019)
Campsites	197.880	+5% (vs. 2024)	+85% (vs. 2019)
Other paid accomm.	41.474	+1% (vs. 2024)	+8% (vs. 2019)

Arrivals,
paid accommodation, 2025



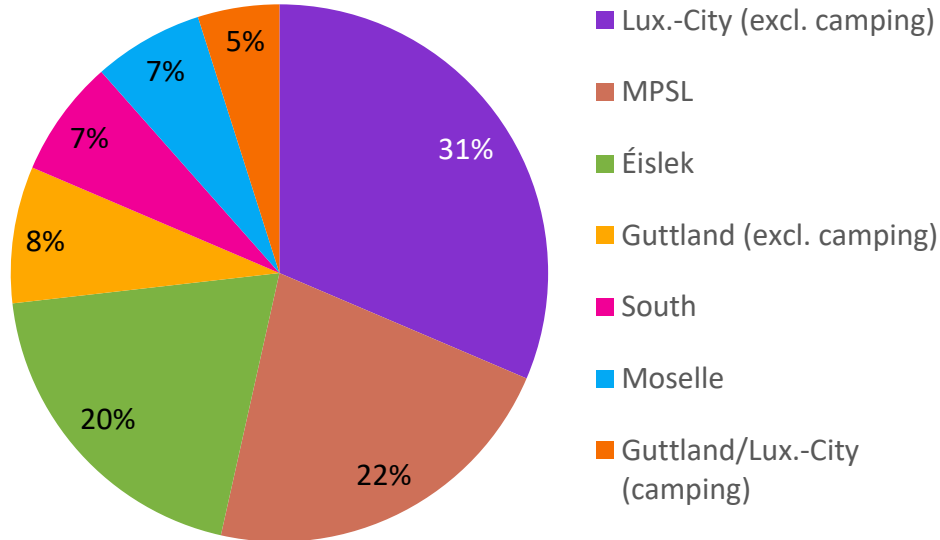
Hotels	156.281	-3% (vs. 2024)	+3% (vs. 2019)
Campsites	66.071	+10% (vs. 2024)	+101% (vs. 2019)
Other paid accomm.	18.141	+1% (vs. 2024)	+9% (vs. 2019)

Nights & arrivals in paid accommodation

Regions, 2025

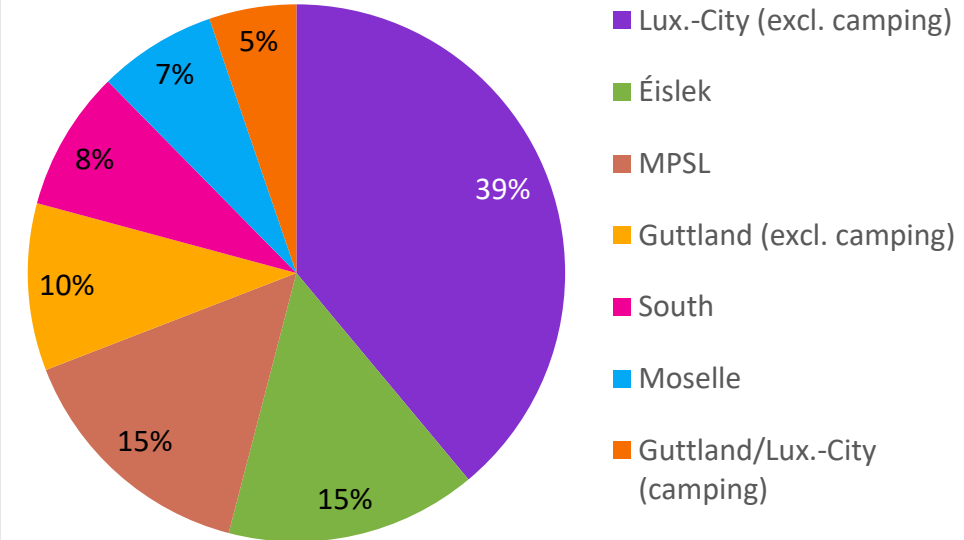


Nights, paid accommodation, 2025



Lux.-City (excl. camping)	159.759	+5% (vs. 2024)	+7% (vs. 2019)
MPSL	112.284	-1% (vs. 2024)	+51% (vs. 2019)
Éislek	100.176	+12% (vs. 2024)	+59% (vs. 2019)
Guttland (excl. camping)	41.816	-29% (vs. 2024)	-4% (vs. 2019)
South	35.843	-17% (vs. 2024)	-10% (vs. 2019)
Moselle	33.696	+6% (vs. 2024)	+5% (vs. 2019)
Guttland/Lux.-City (camping)	24.938	-13% (vs. 2024)	+60% (vs. 2019)

Arrivals, paid accommodation, 2025



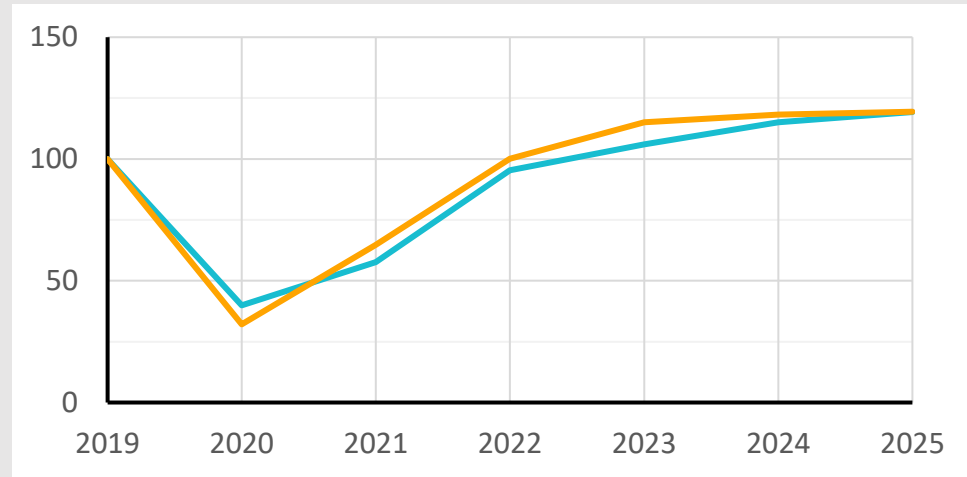
Lux.-City (excl. camping)	93.649	+5% (vs. 2024)	+10% (vs. 2019)
Éislek	36.359	+11% (vs. 2024)	+46% (vs. 2019)
MPSL	36.235	+7% (vs. 2024)	+49% (vs. 2019)
Guttland (excl. camping)	24.204	-23% (vs. 2024)	+0% (vs. 2019)
South	20.296	-5% (vs. 2024)	+2% (vs. 2019)
Moselle	17.132	+10% (vs. 2024)	+14% (vs. 2019)
Guttland/Lux.-City (camping)	12.618	-13% (vs. 2024)	+60% (vs. 2019)

Arrivals in paid accommodation

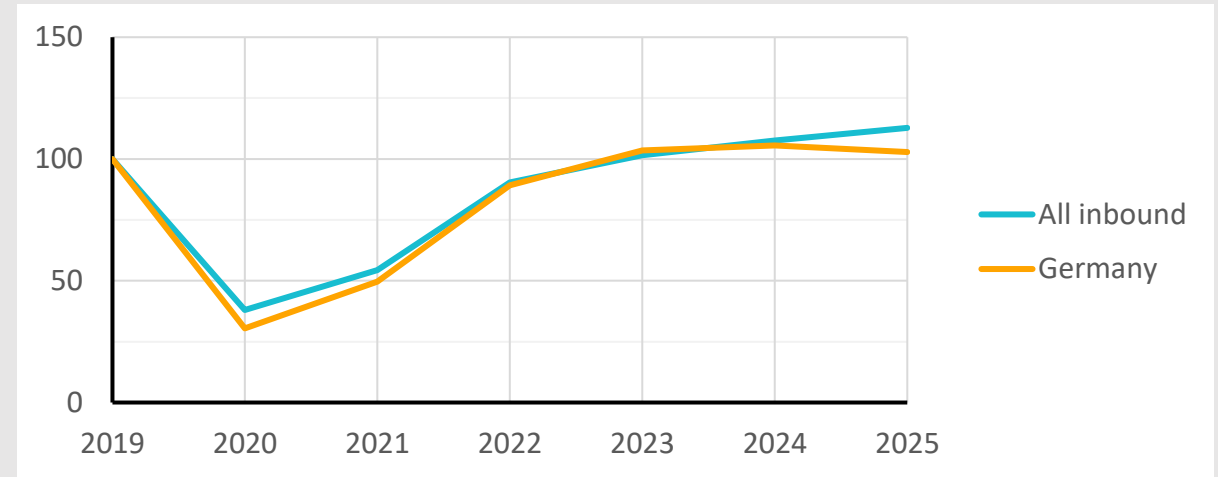
Trends 2019-2025



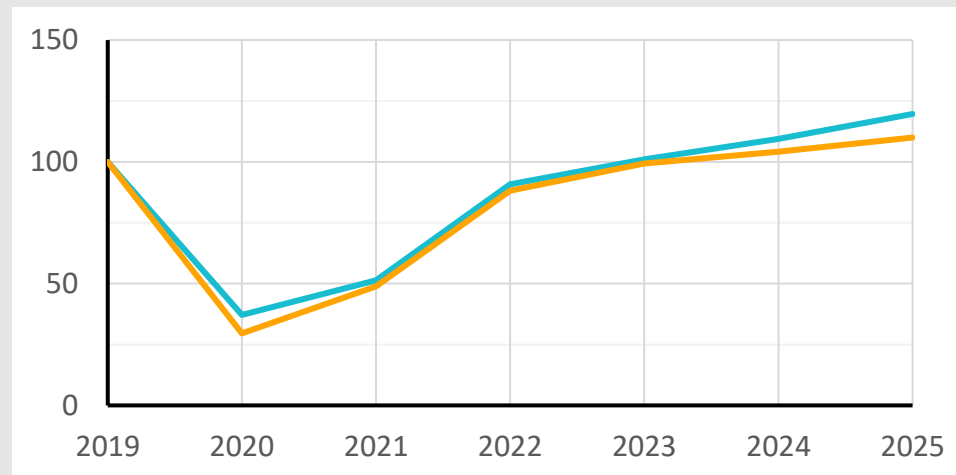
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

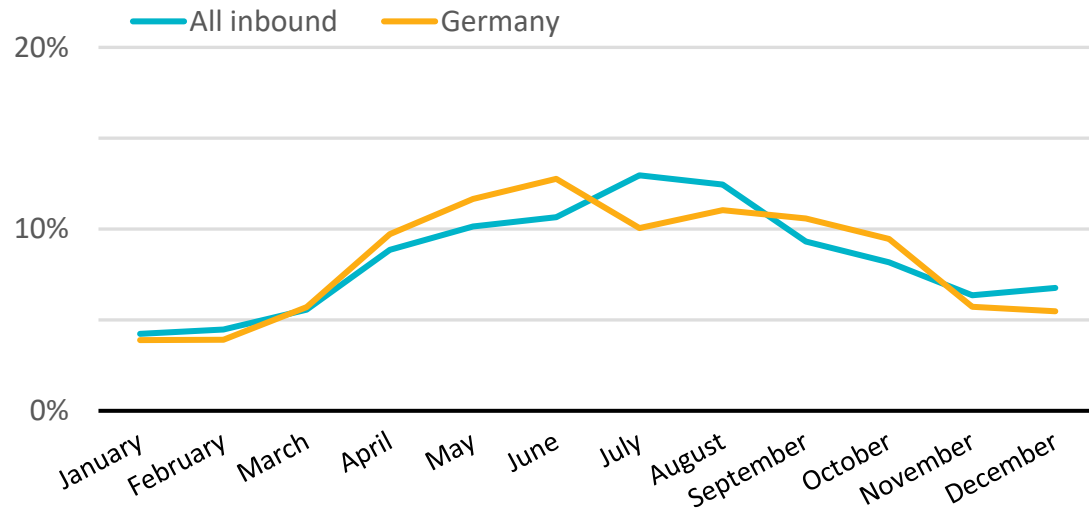


Arrivals in paid accommodation

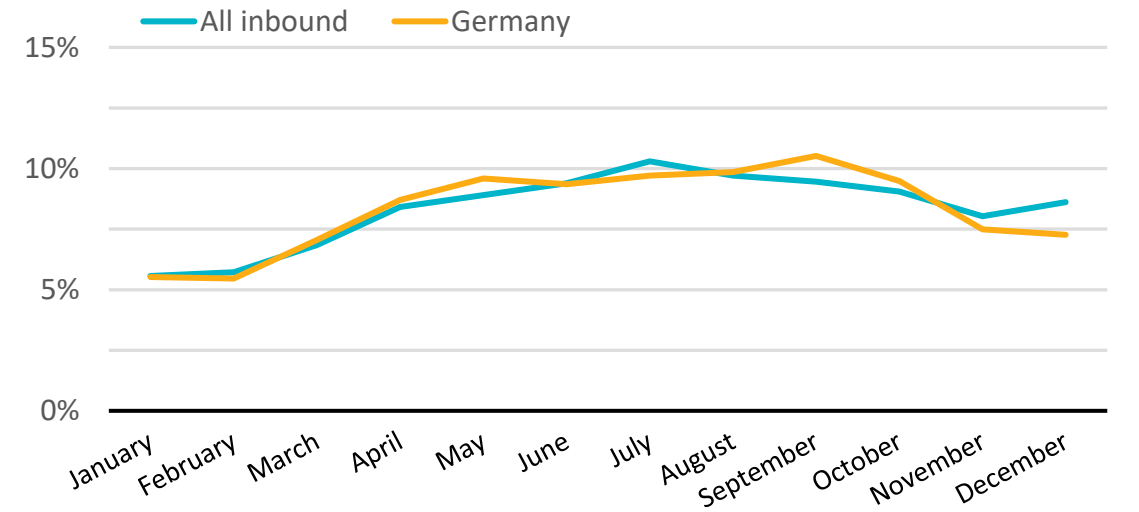
Seasonality



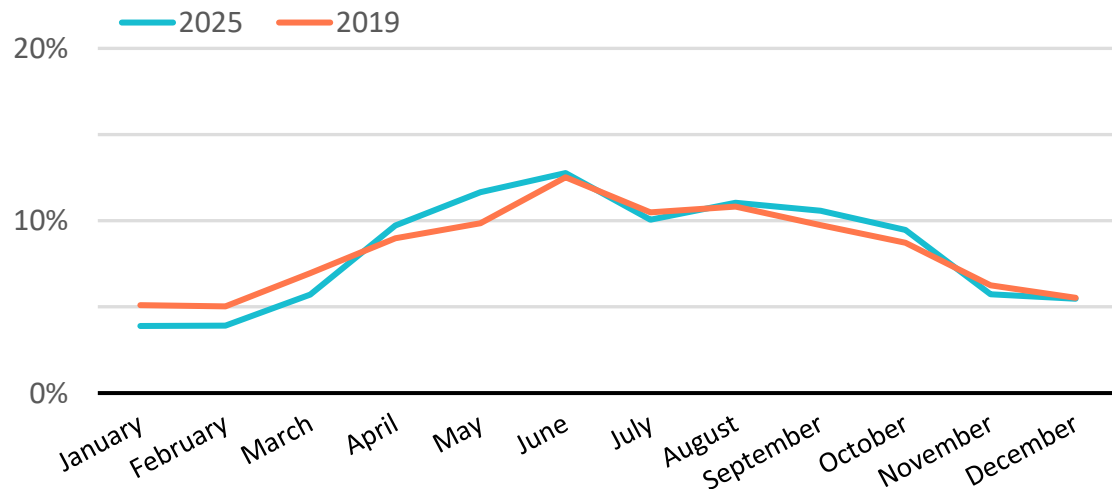
All paid accommodation, 2025



Hotels, 2025



All paid accommodation, arrivals from Germany



Short-term rentals

2025 and 2019-2025



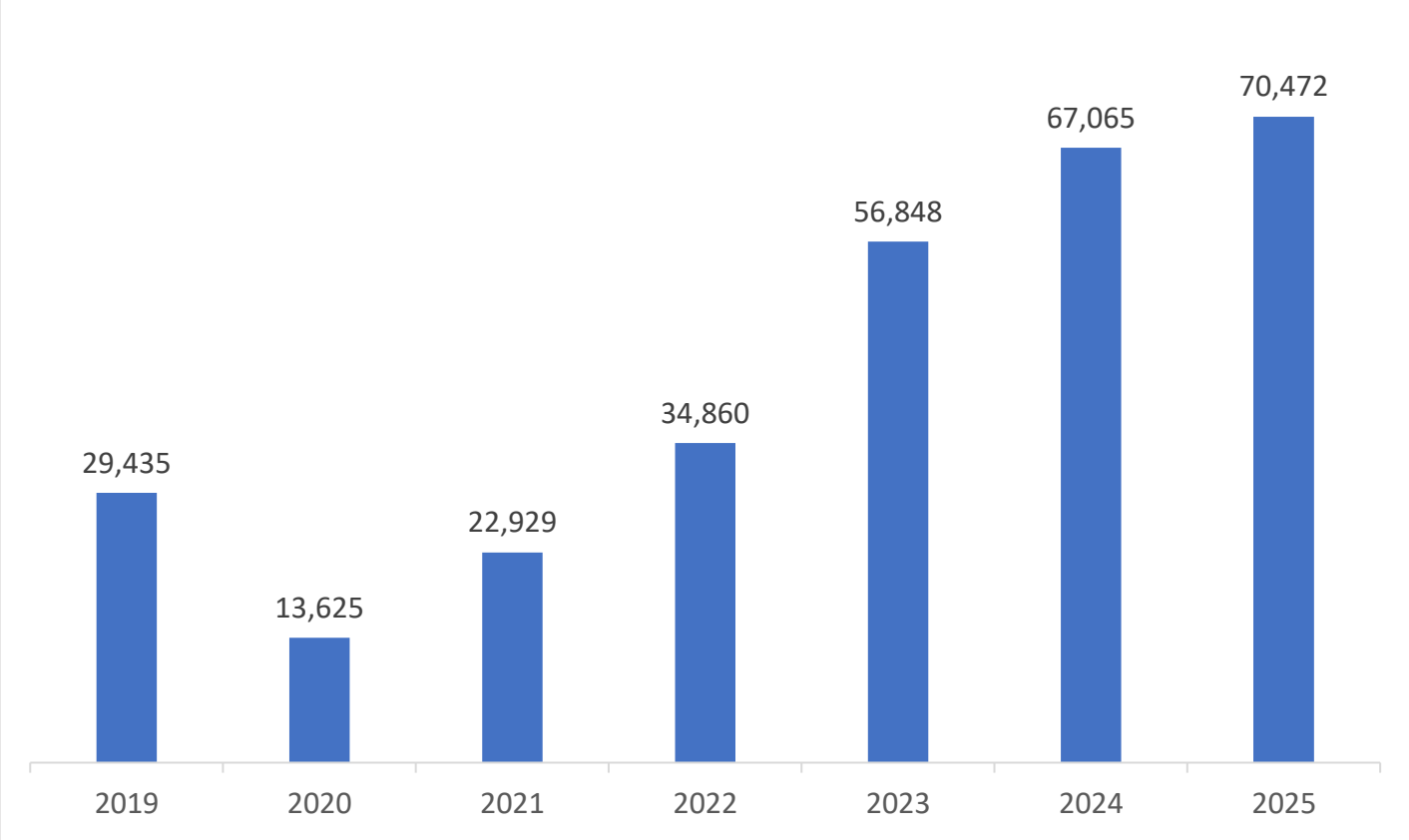
Nights,
Short-term rentals, 2025



+18% (vs. 2024)

+128% (vs. 2019)

Nights,
Short-term rentals, 2019-2025





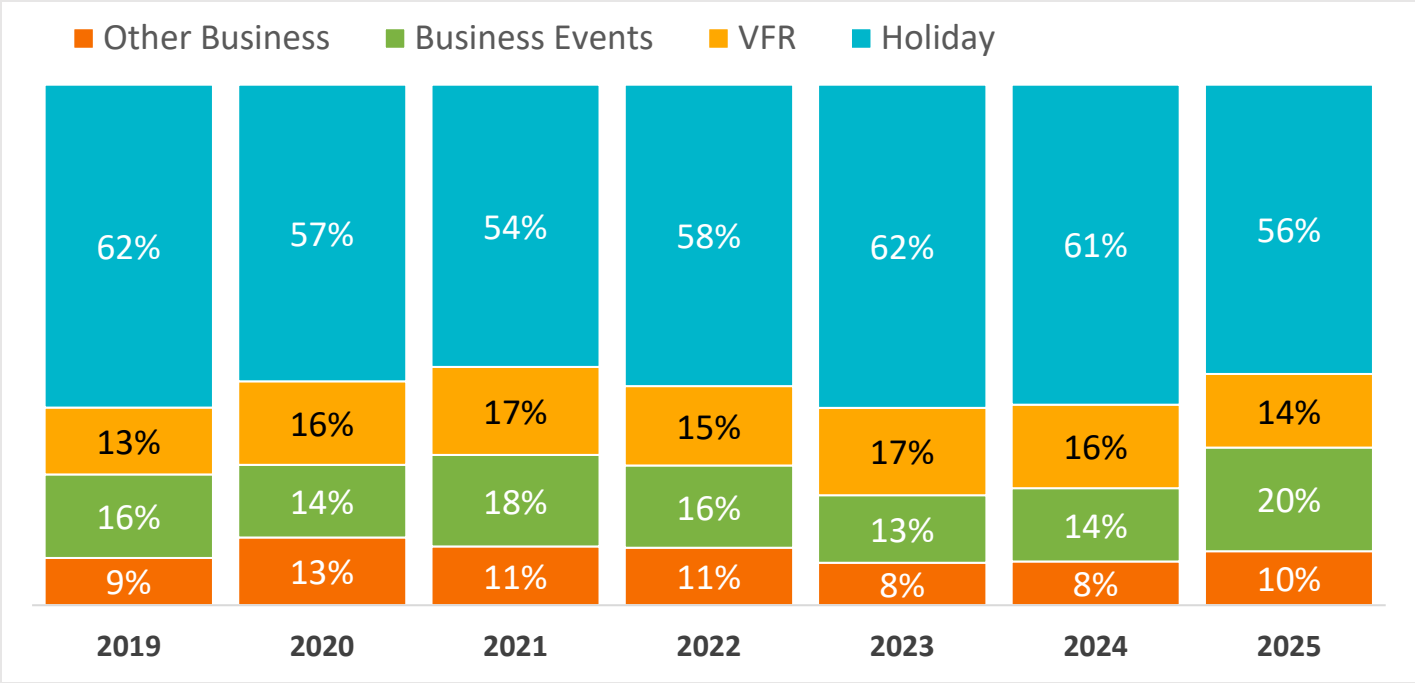
Characteristics of inbound trips

German trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2019-2025

German trips to Luxembourg, 2019-2025



2025

Germany to
Luxembourg

Europe to
Luxembourg

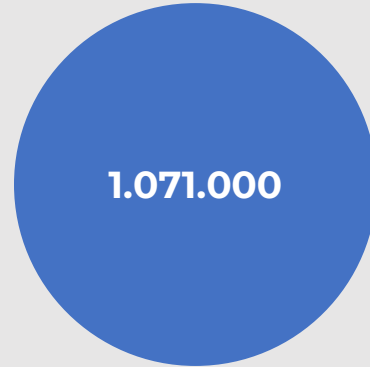
Holiday	56%	62%
VFR	14%	12%
Business Events	20%	17%
Other Business	10%	8%

Inbound same-day trips to Luxembourg

2025



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



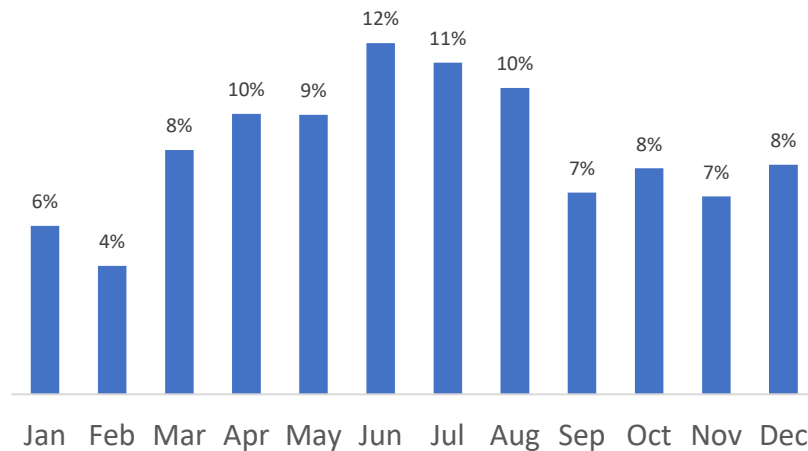
+15% (vs. 2024)

**Average length
of same-day trips**



+0,5 h (vs. 2024)

**Seasonality
% of same-day trips**

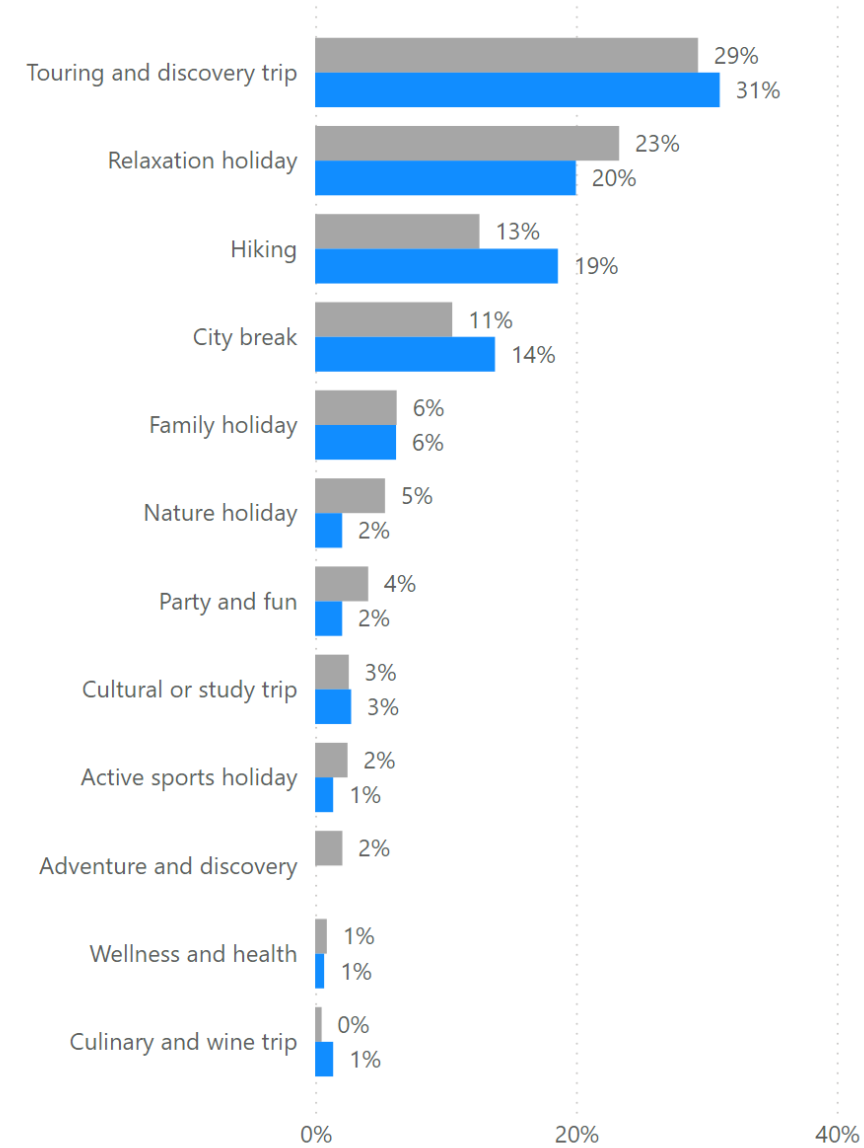




Travel behaviour of inbound leisure visitors

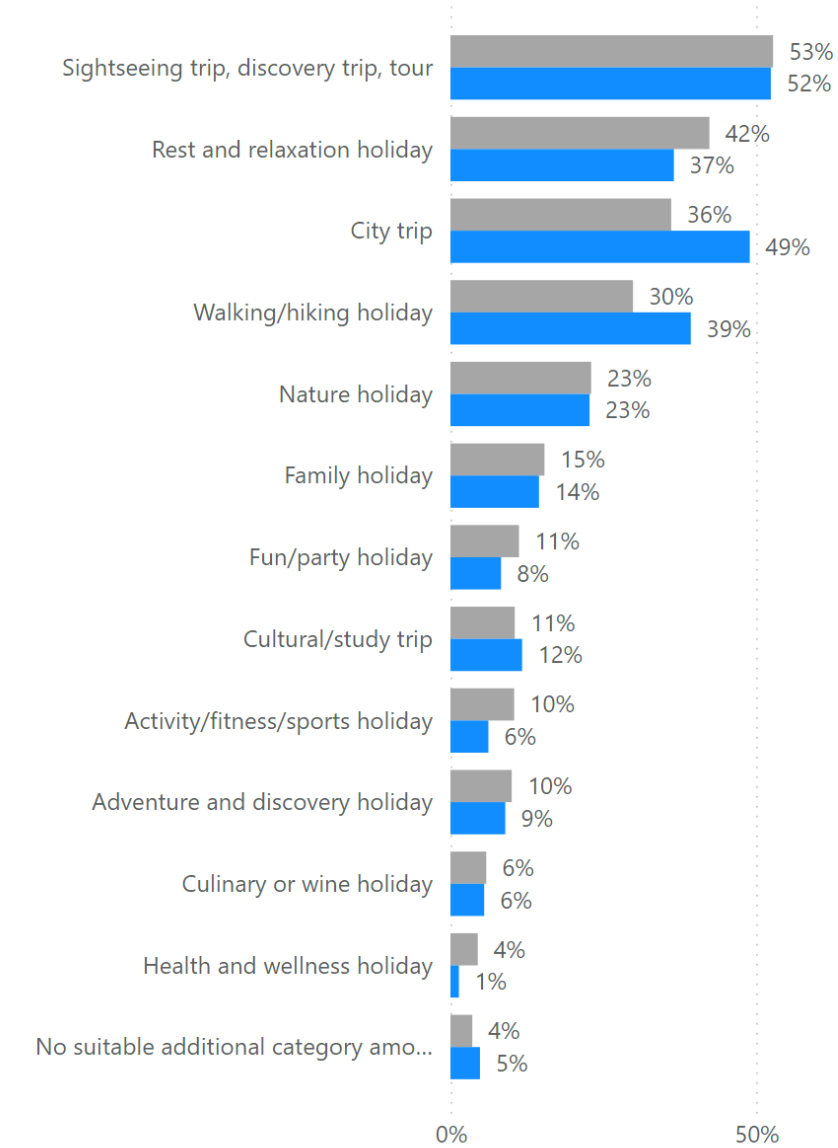
Main holiday types
Leisure overnight visitors, 2025

All inbound Germany



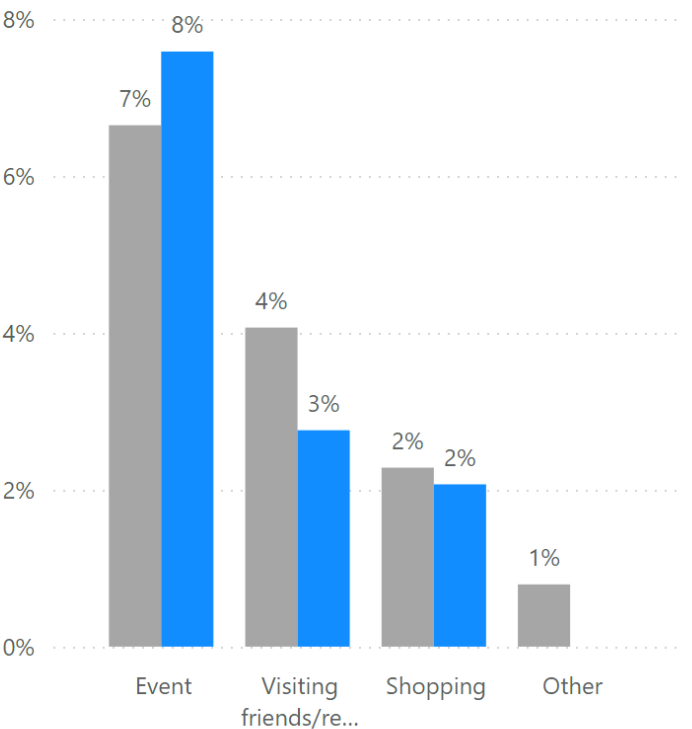
All holiday types
Leisure overnight visitors, 2025

All inbound Germany



Main purpose of overnight trip (if not holiday)
Leisure overnight visitors, 2025

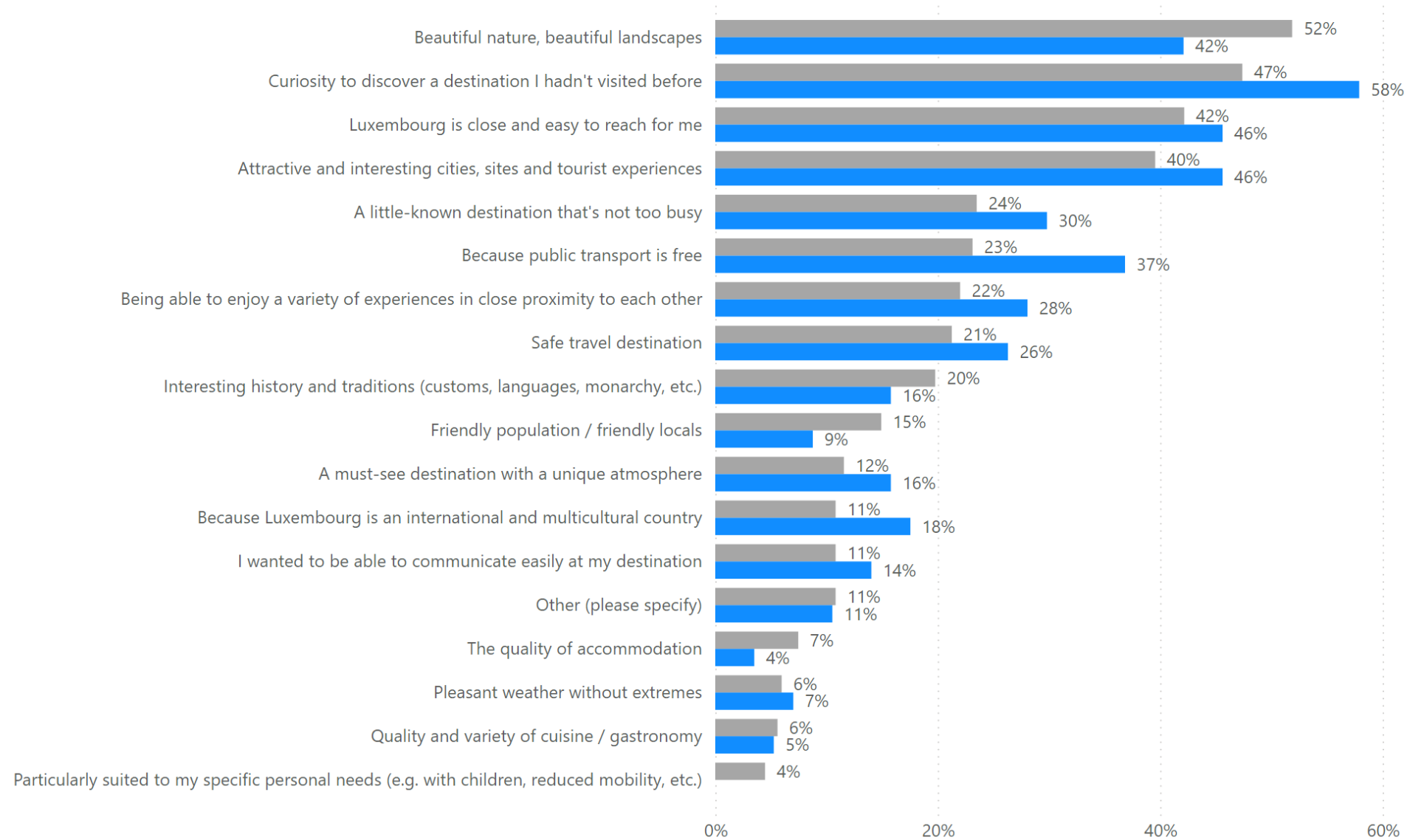
All inbound Germany



Reasons for choosing Luxembourg

Leisure overnight visitors, 2025

● All inbound ● Germany

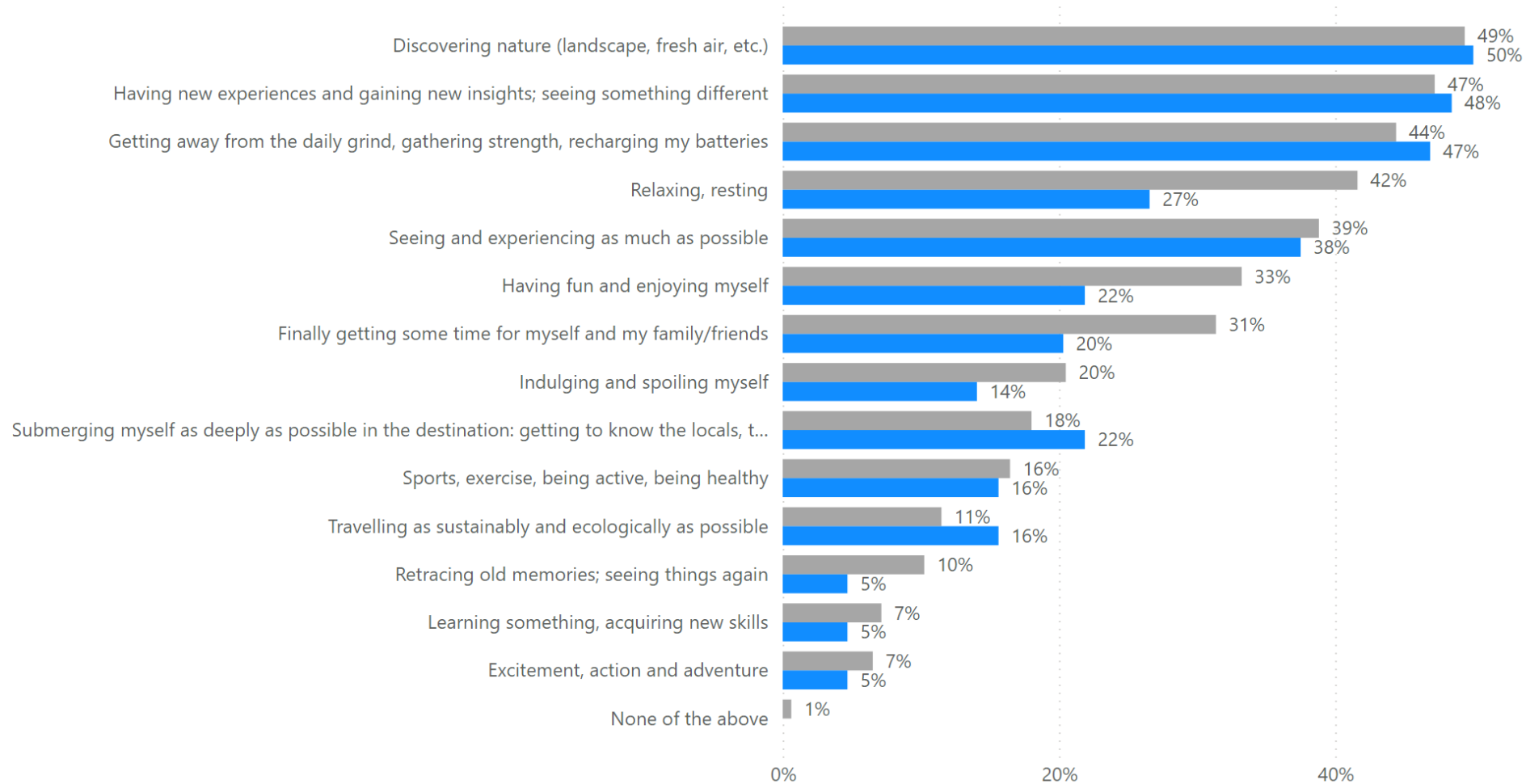




Travel Motives

Leisure overnight visitors, 2025

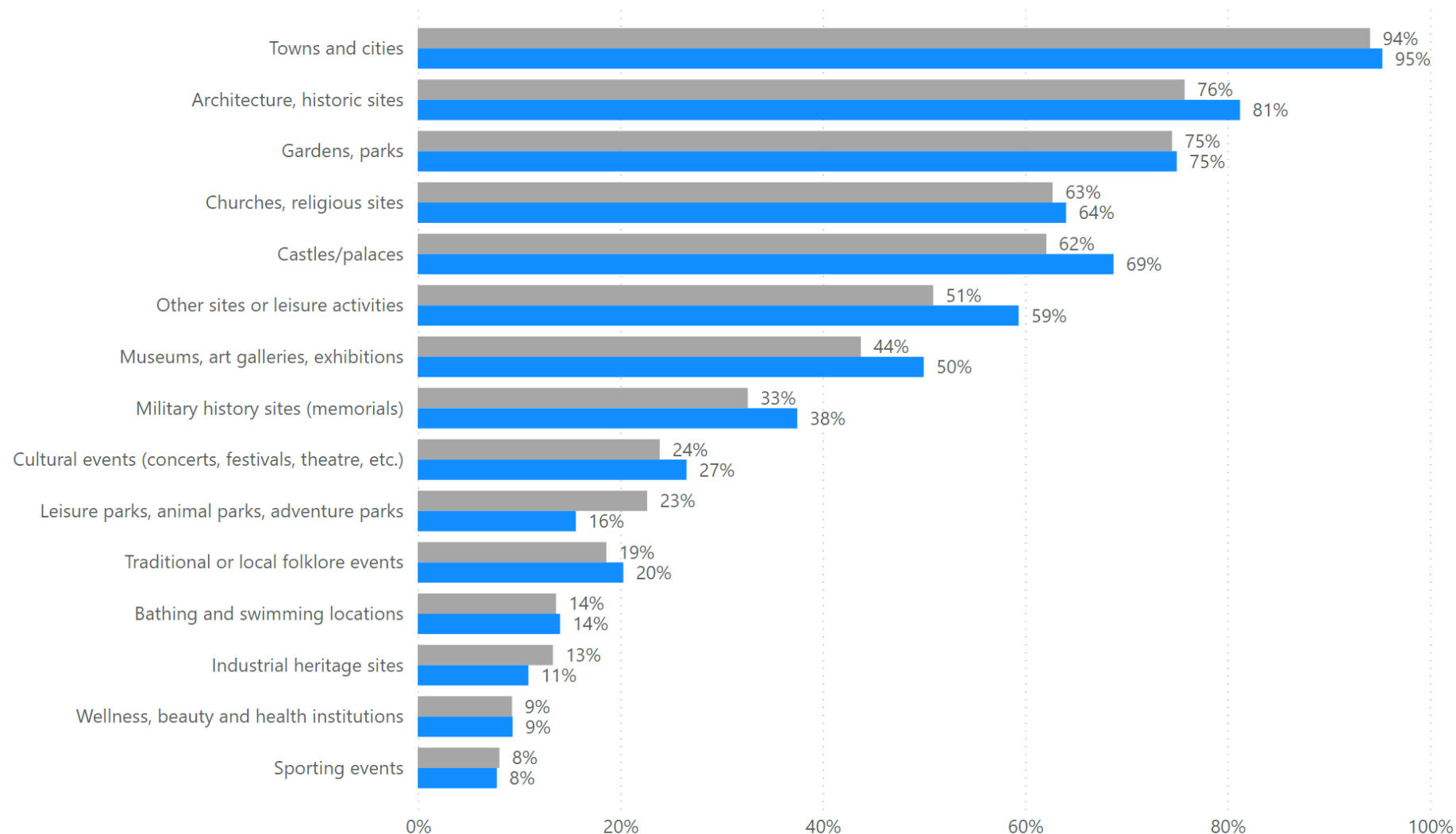
● All inbound ● Germany



Places visited

Leisure overnight visitors, 2025

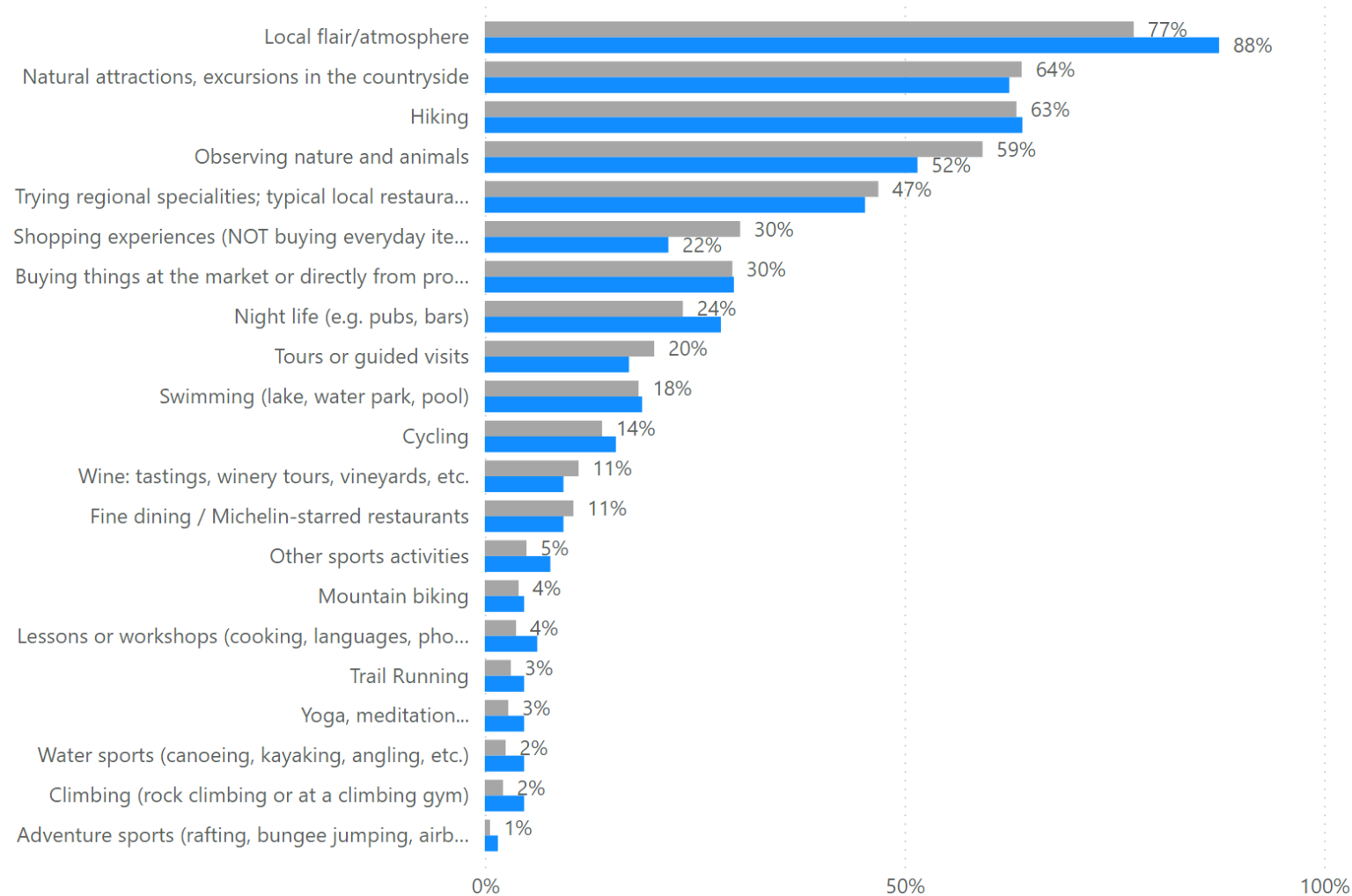
● All inbound ● Germany



Activities (sporting and non-sporting)

Leisure overnight visitors, 2025

● All inbound ● Germany

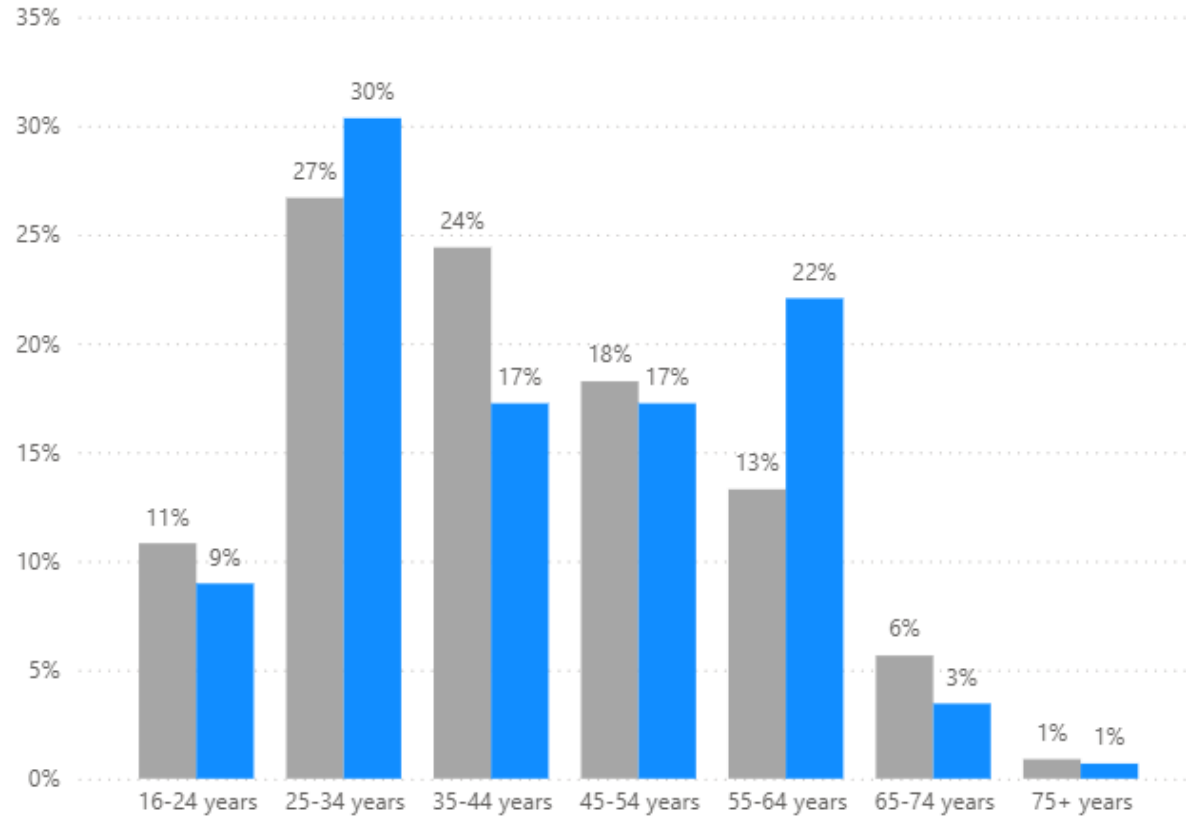




Age

Leisure overnight visitors, 2025

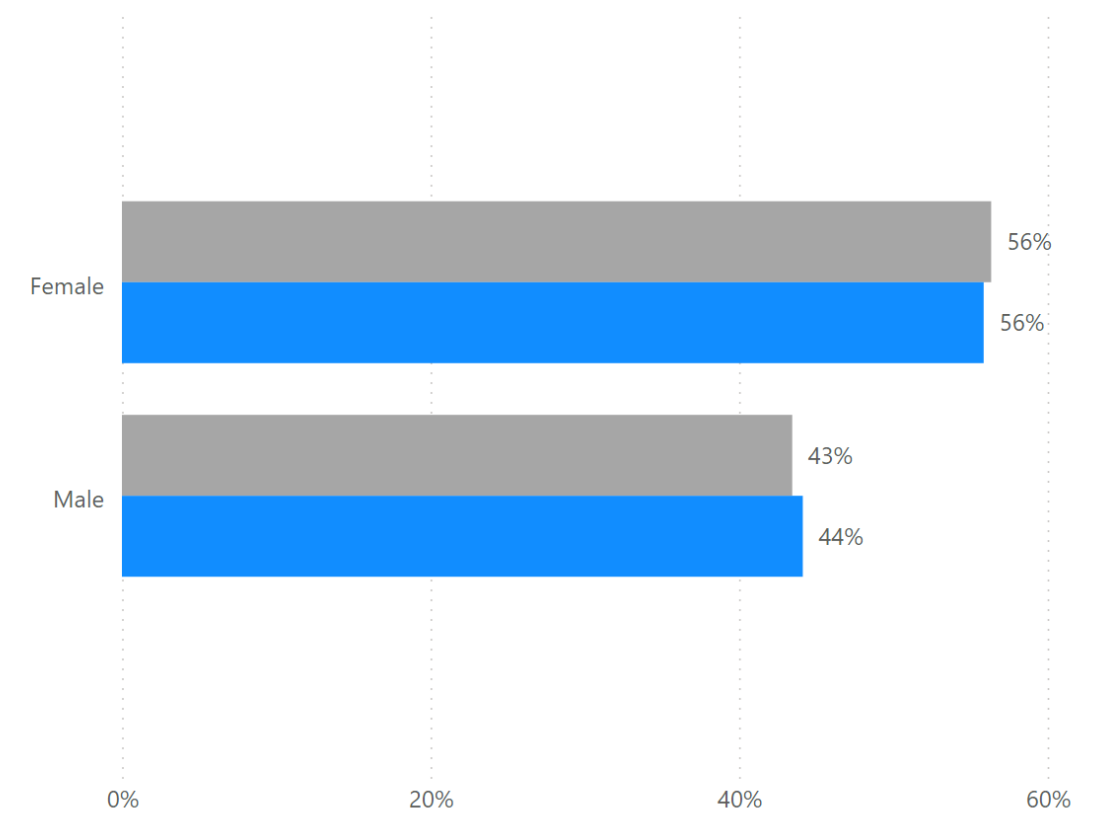
● All inbound ● Germany



Gender

Leisure overnight visitors, 2025

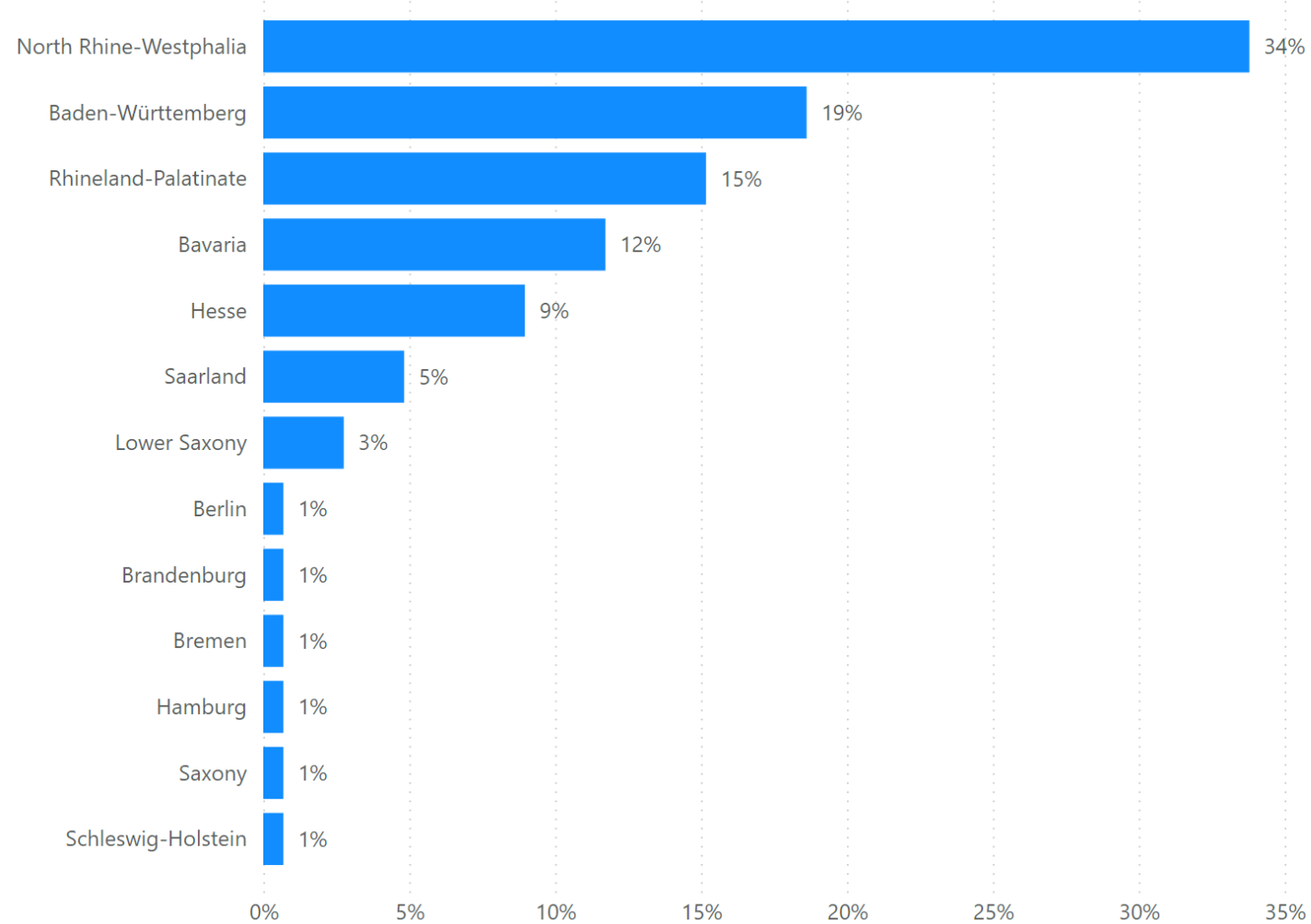
● All inbound ● Germany





Region of origin Leisure overnight visitors, 2025

● Germany

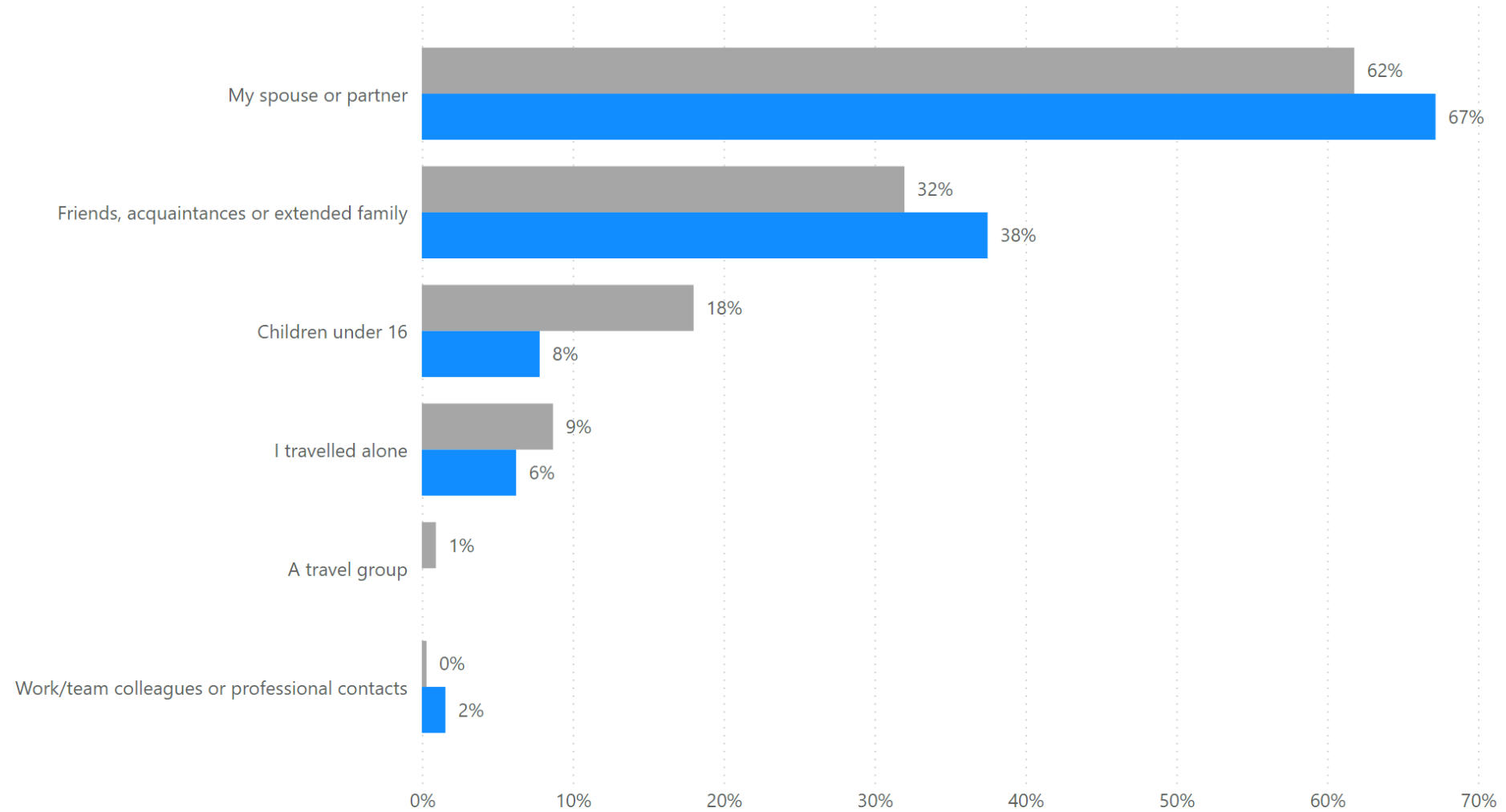




Travel party

Leisure overnight visitors, 2025

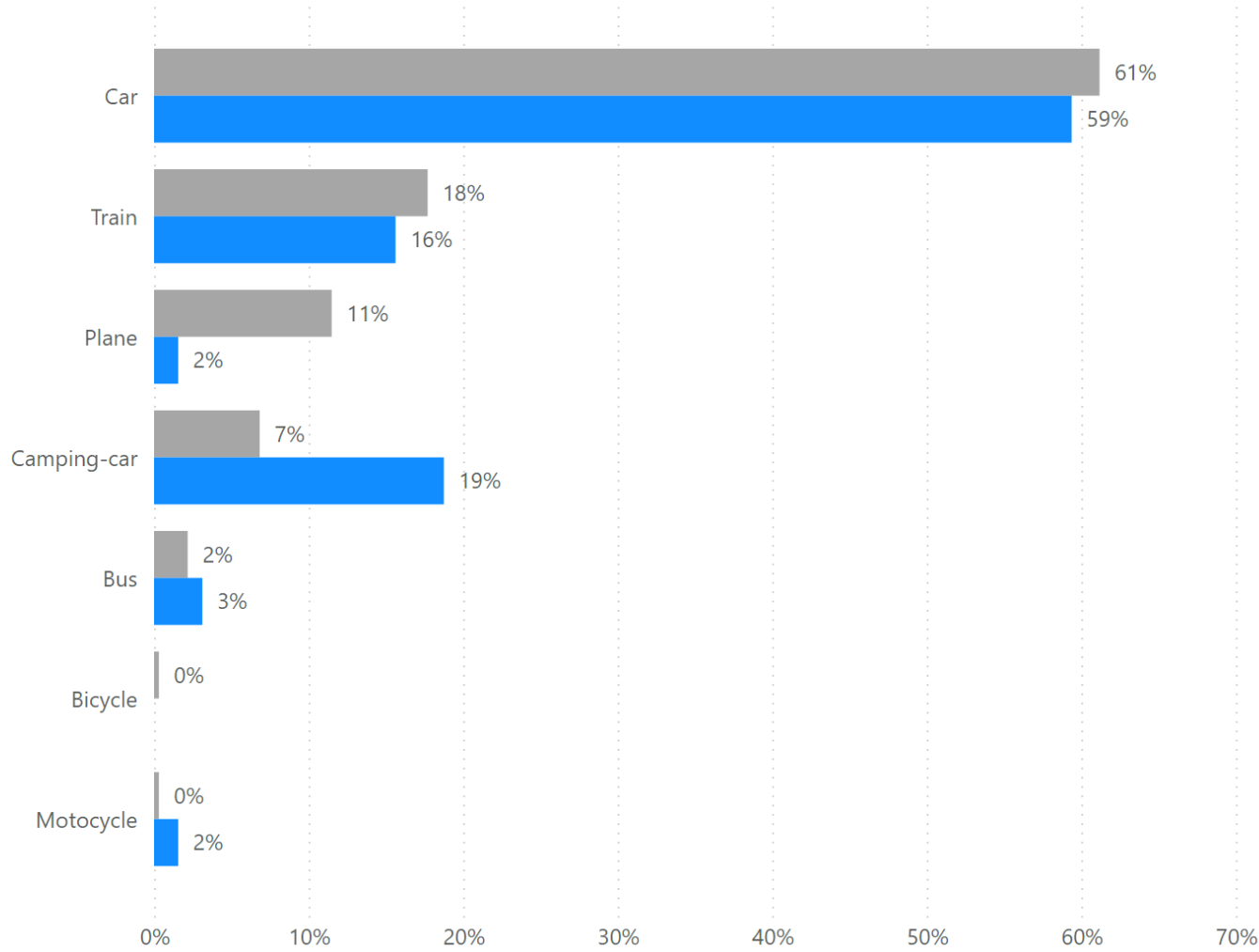
● All inbound ● Germany





Transport to destination
Leisure overnight visitors, 2025

● All inbound ● Germany



First-time visitors
Leisure overnight visitors, 2025

60%

All inbound

63%

Germany

Visitors spending nights in
Luxembourg and abroad
during same trip

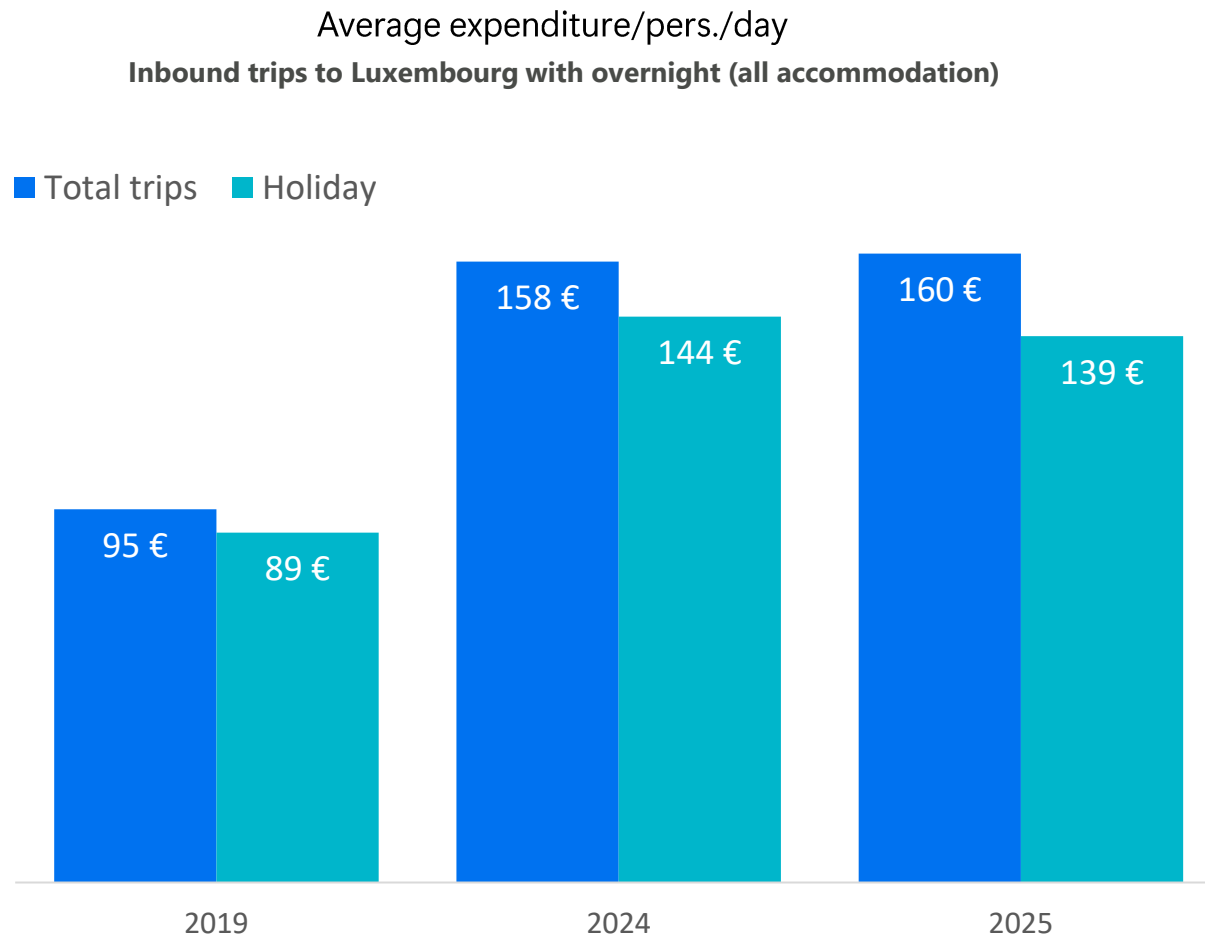
Leisure overnight visitors, 2025

33%

All inbound

34%

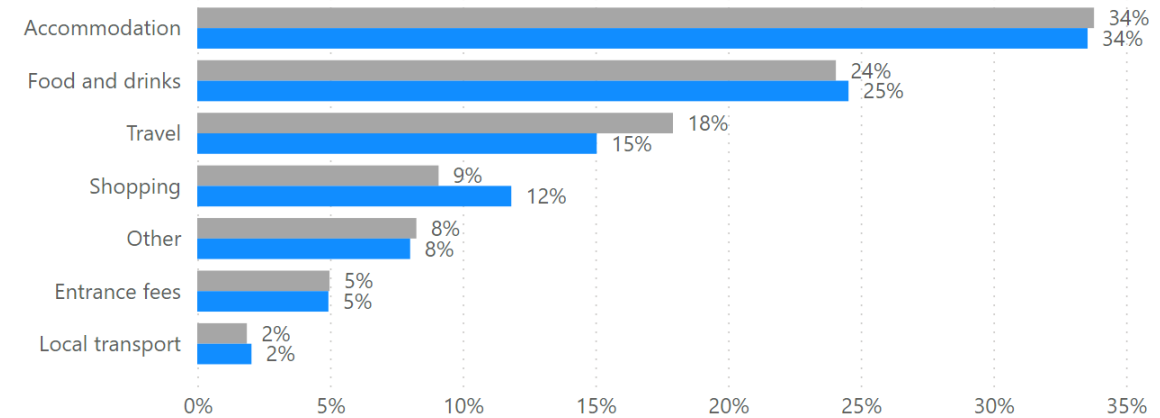
Germany



Spending categories

Leisure overnight visitors, 2025

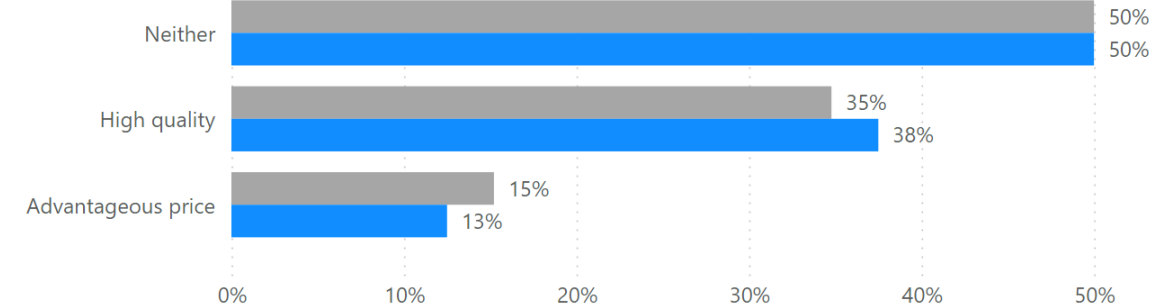
● All inbound ● Germany



Quality vs. price orientation

Leisure overnight visitors, 2025

● All inbound ● Germany

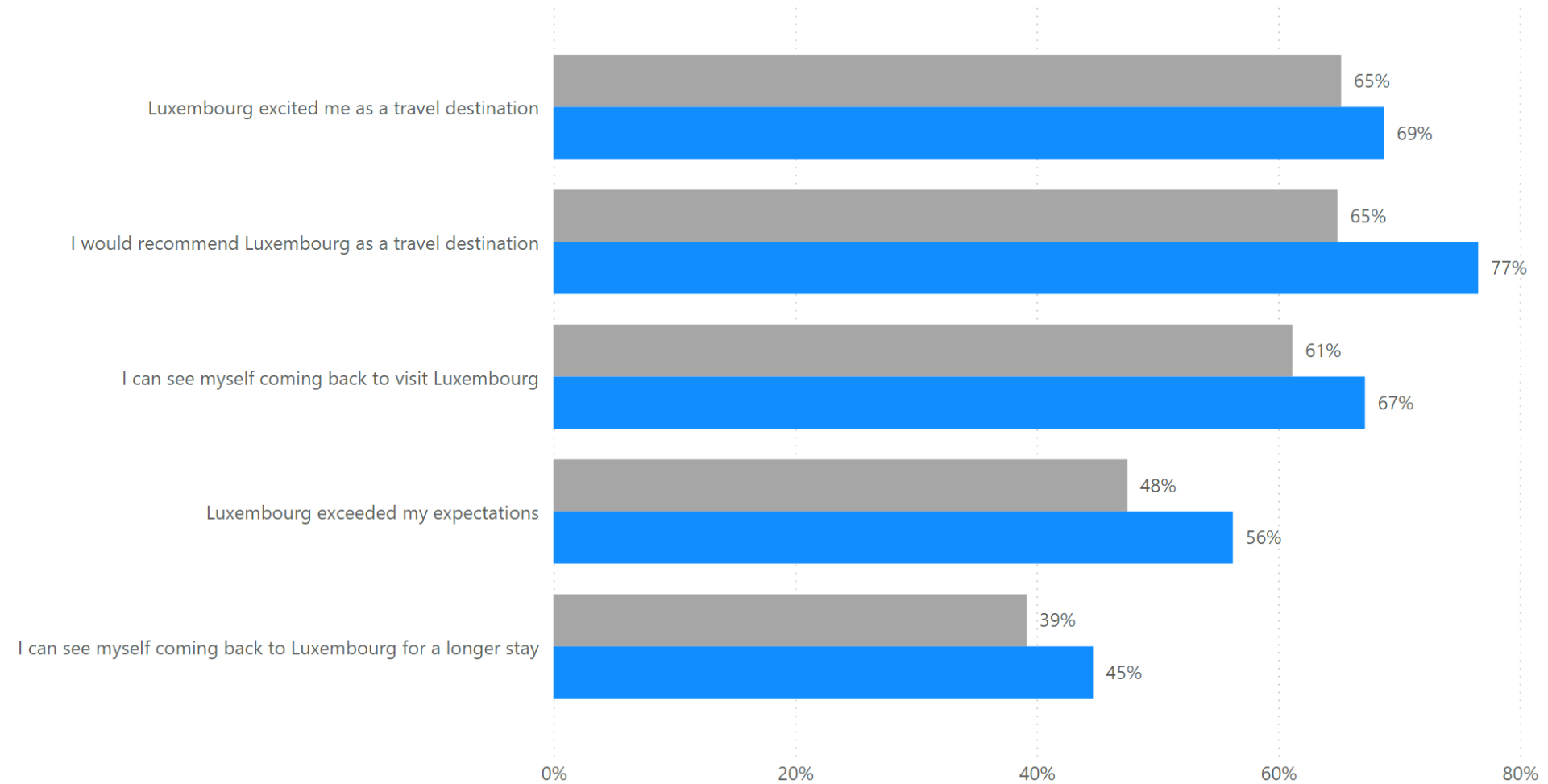




Overall satisfaction - % "strongly agree"

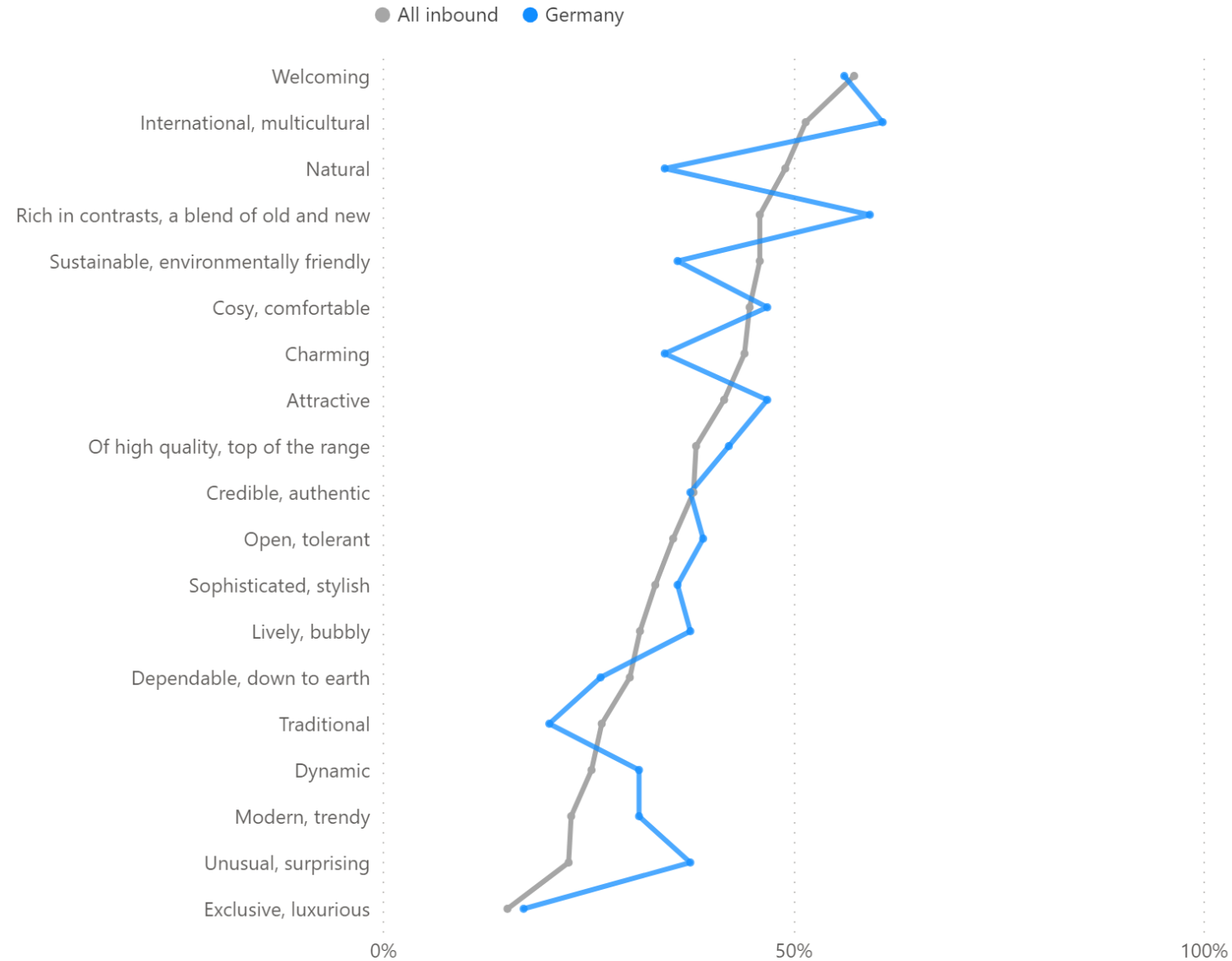
Leisure overnight visitors, 2025

● All inbound ● Germany



Brand features

Leisure overnight visitors, 2025





Target segments, Brand & Growth Potential

LFT Target Segments



Germany
All inbound

Explorers



Nature-Loving Actives



Relaxation Seekers



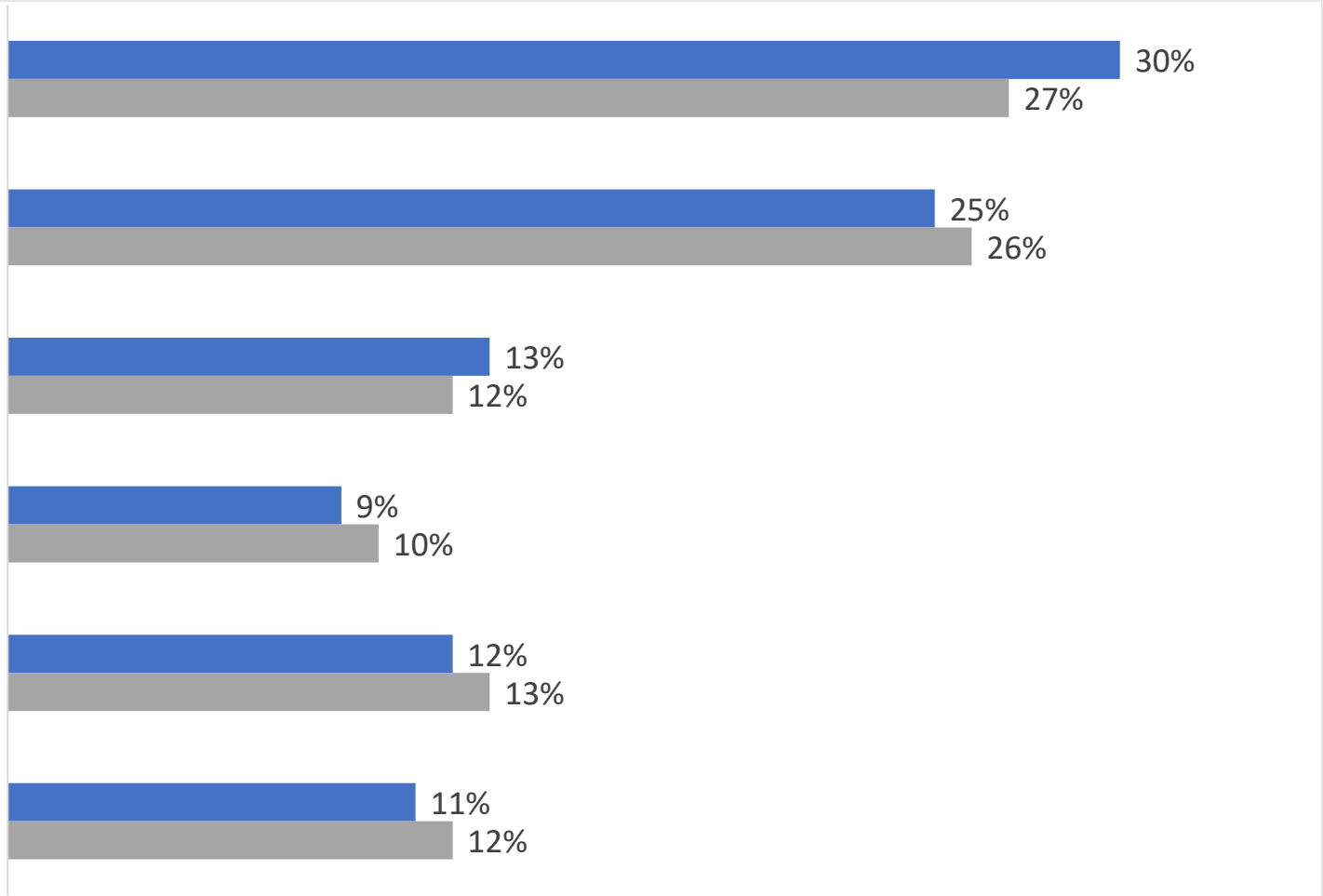
Short Breakers



Perfection Seekers

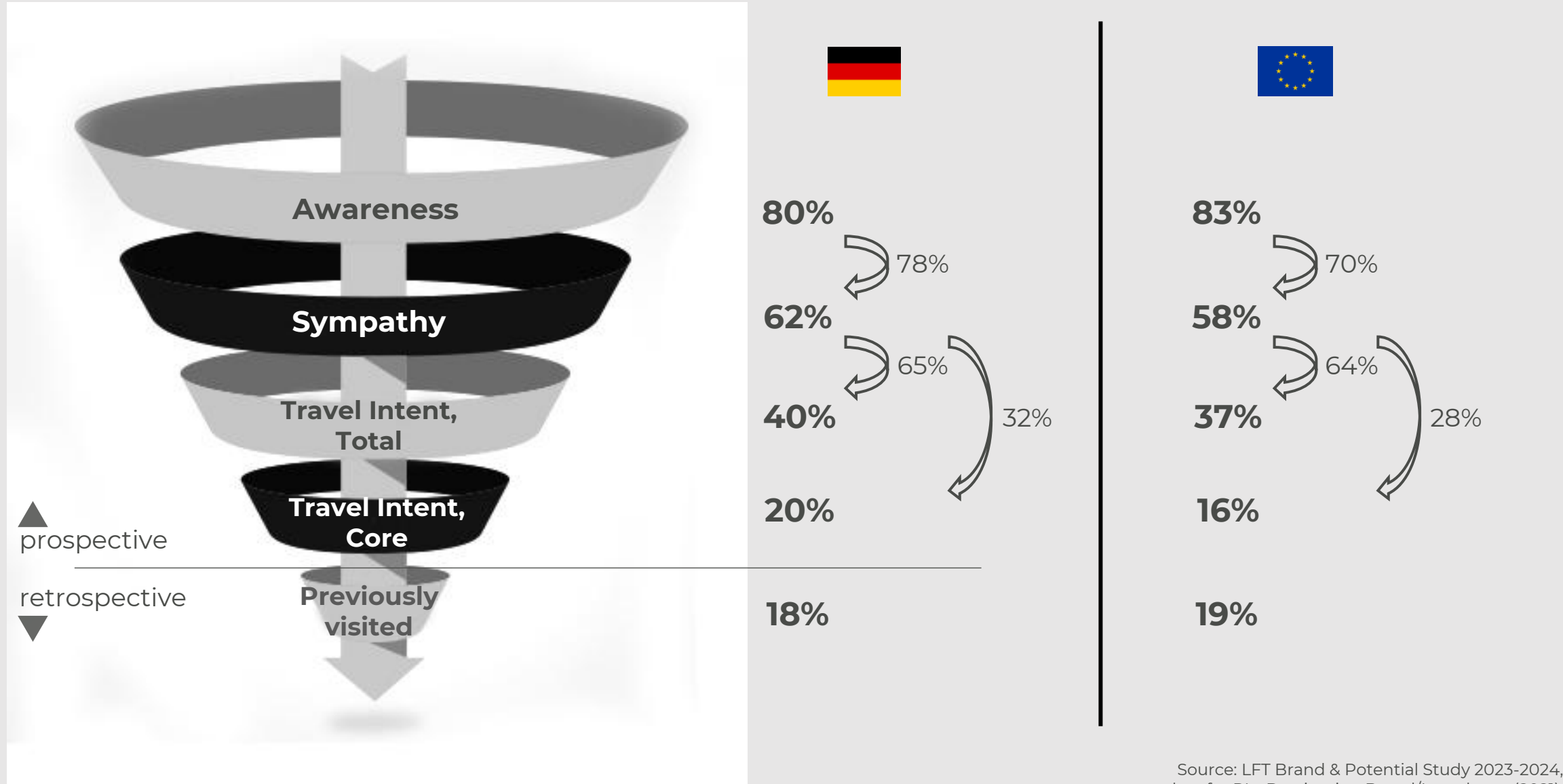


Leisure Oriented



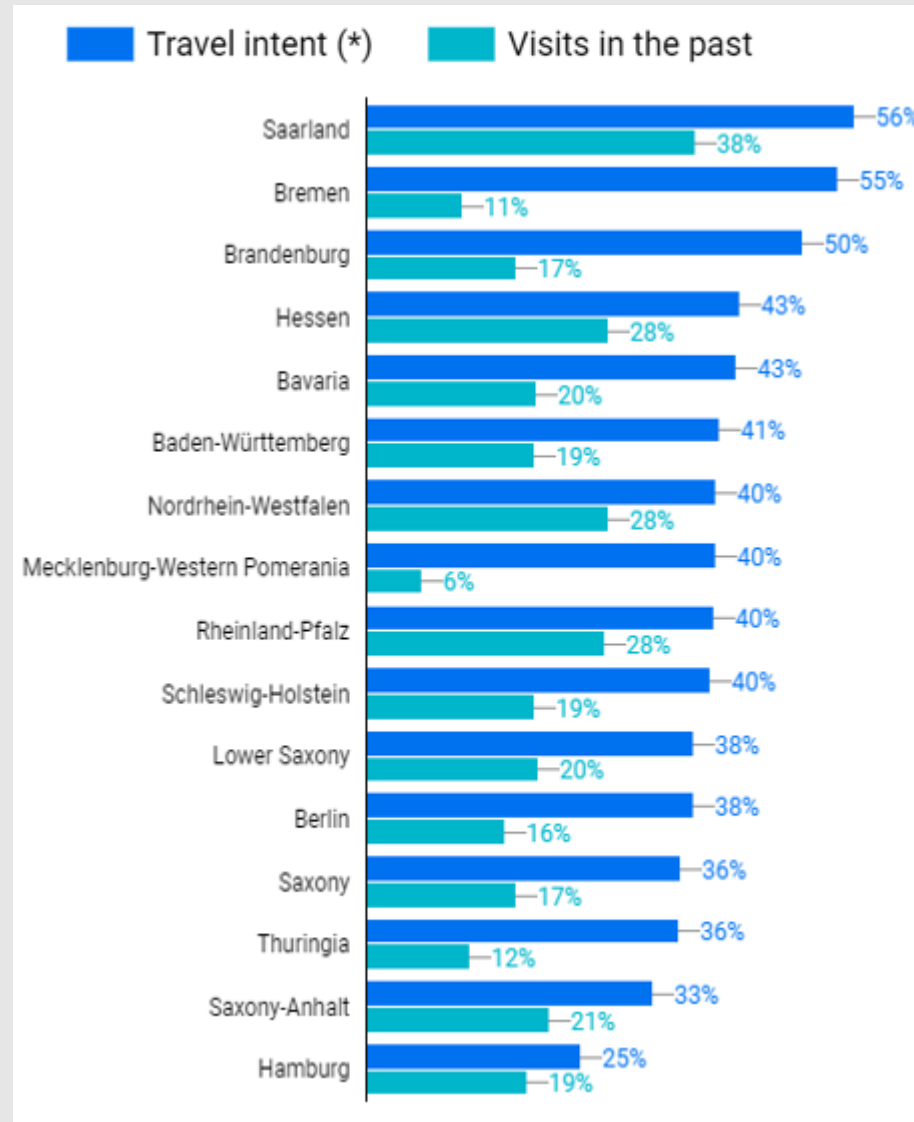
Destination Luxembourg - Brand Funnel 2024

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.

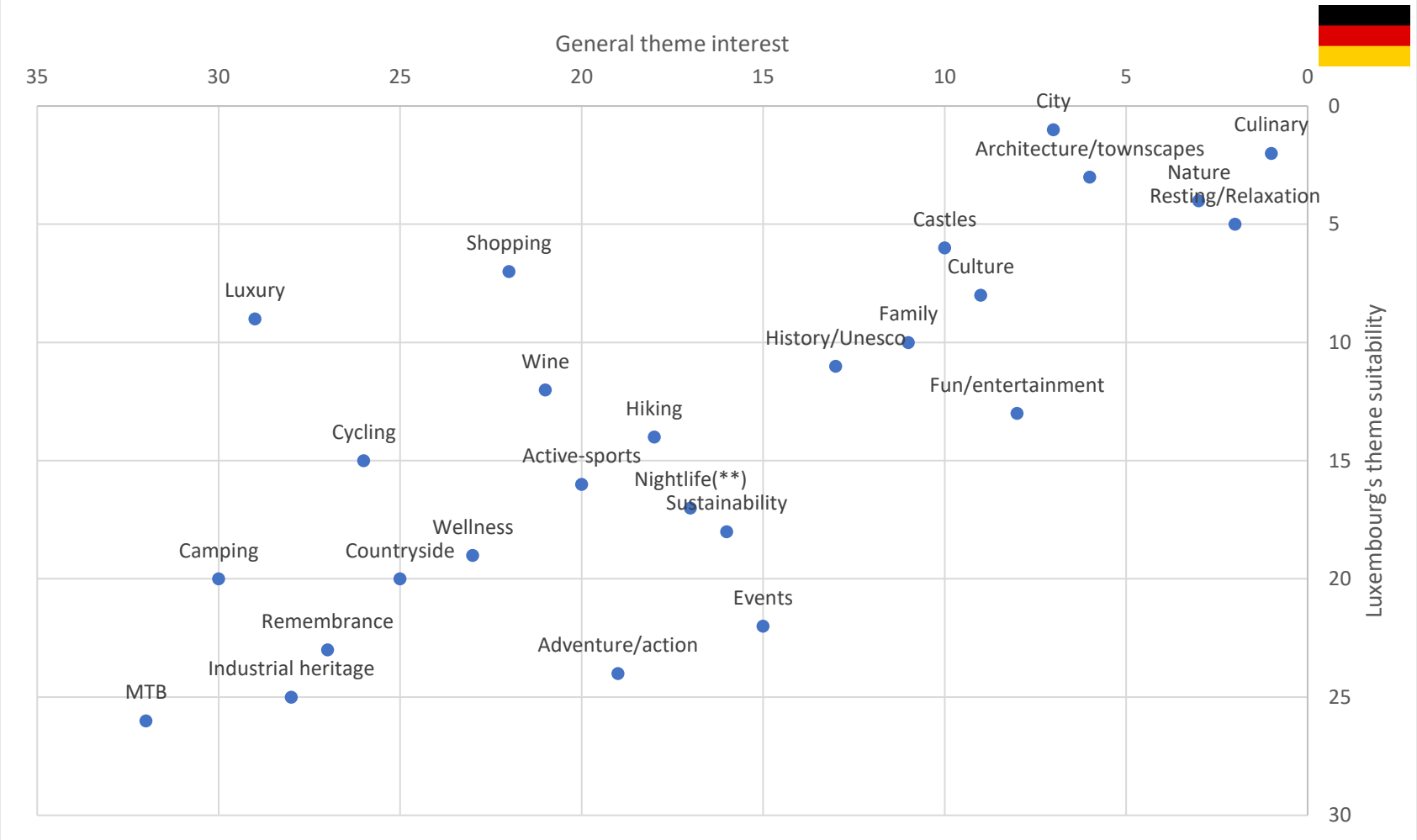
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

(***) 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



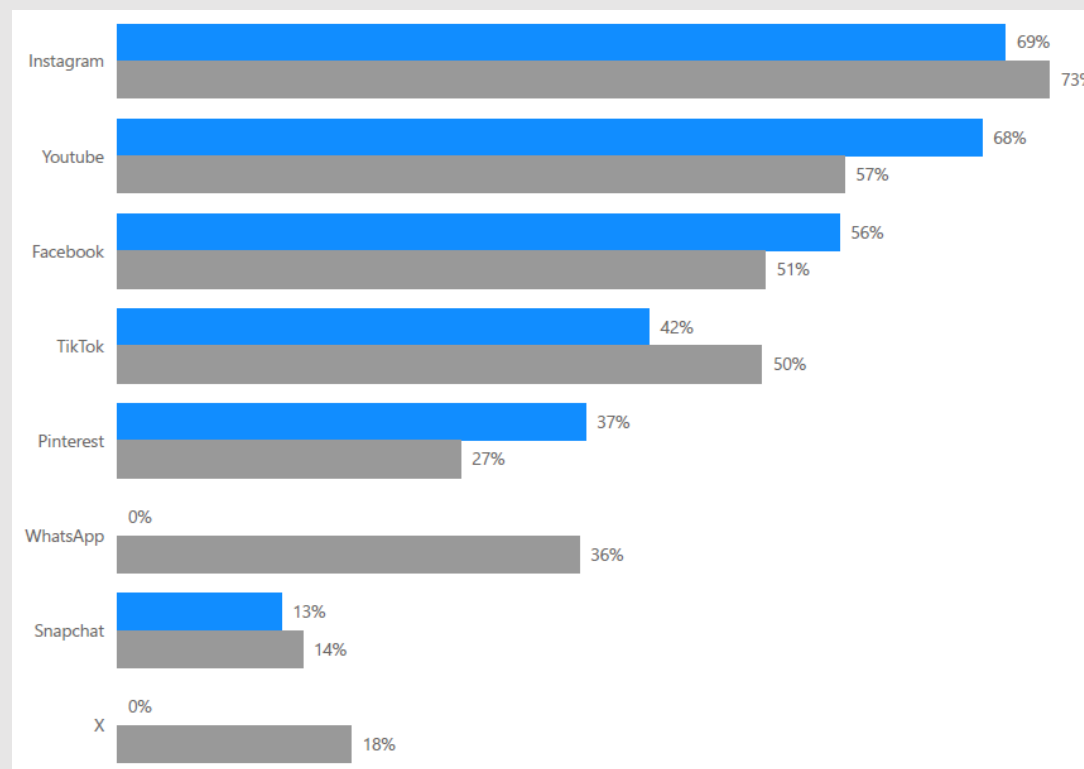
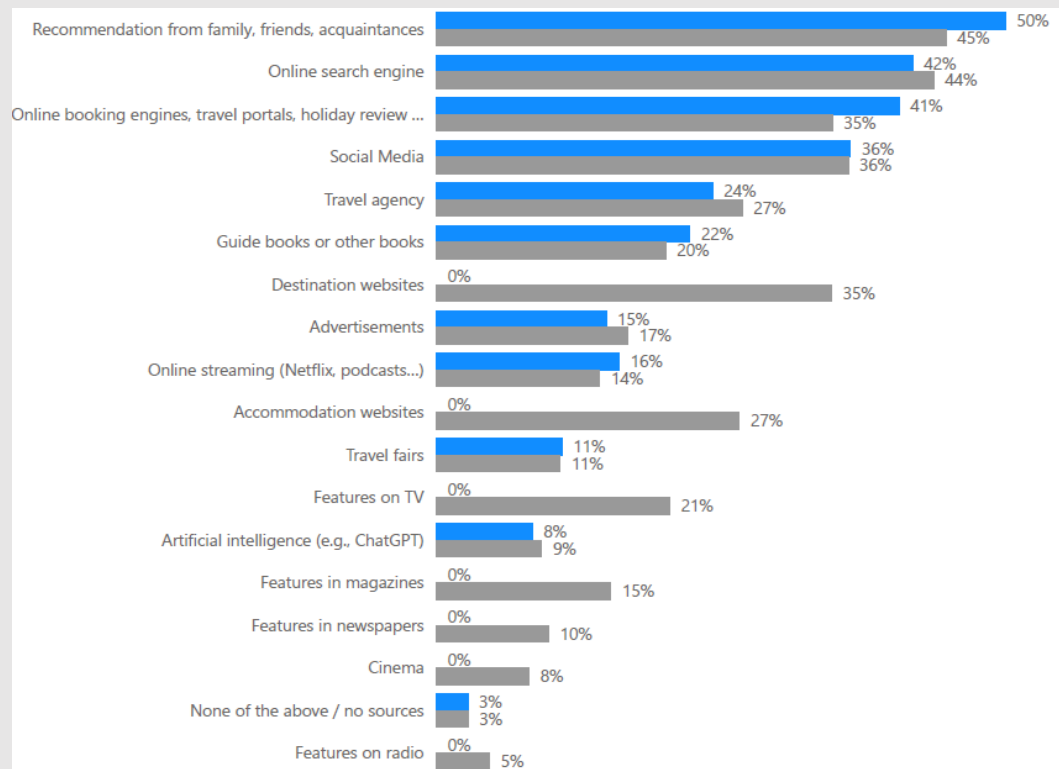
Trip organisation and preferences (1)

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

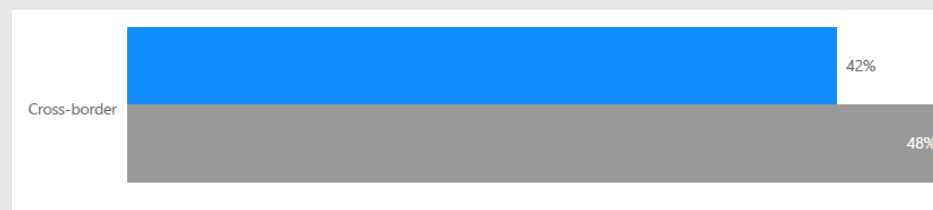


Germany
All inbound

Preferred sources of travel inspiration



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

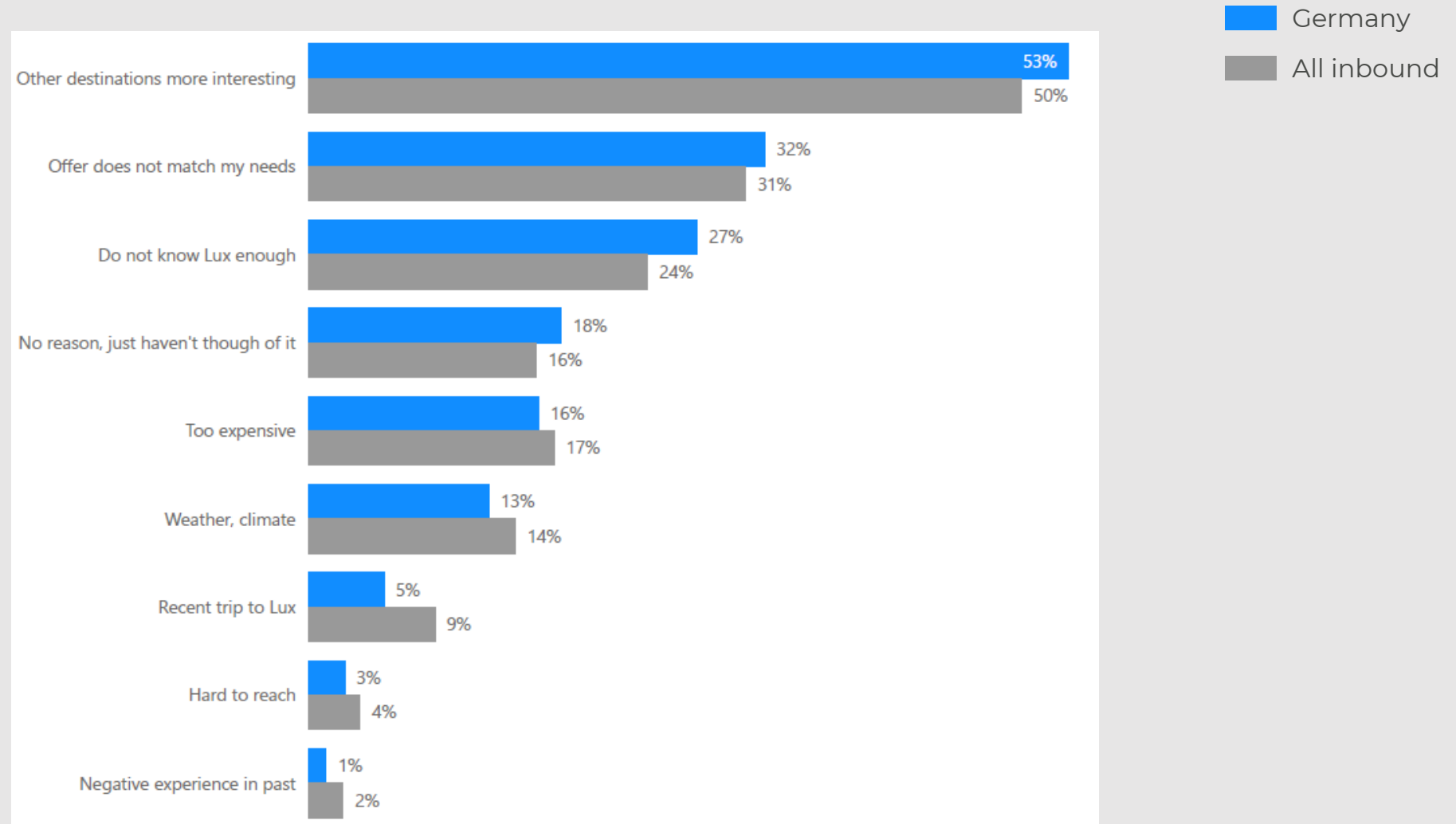


Trip organisation and preferences (2)

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



Reasons for not considering Luxembourg as a destination

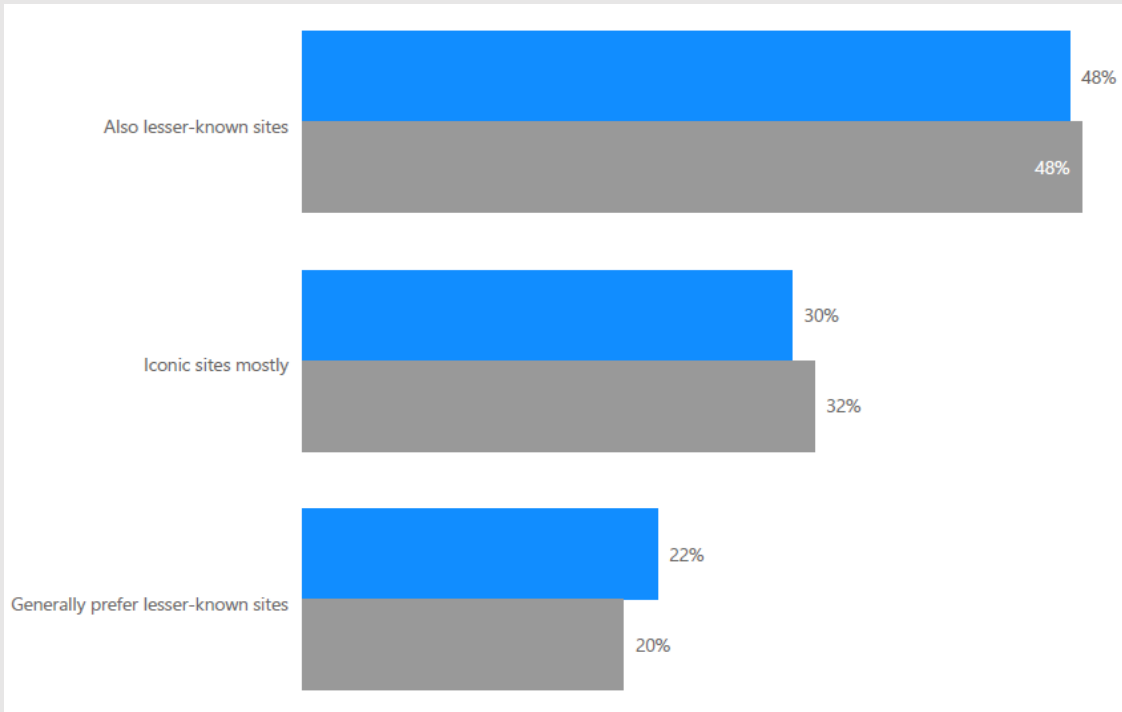


Trip organisation and preference (3)

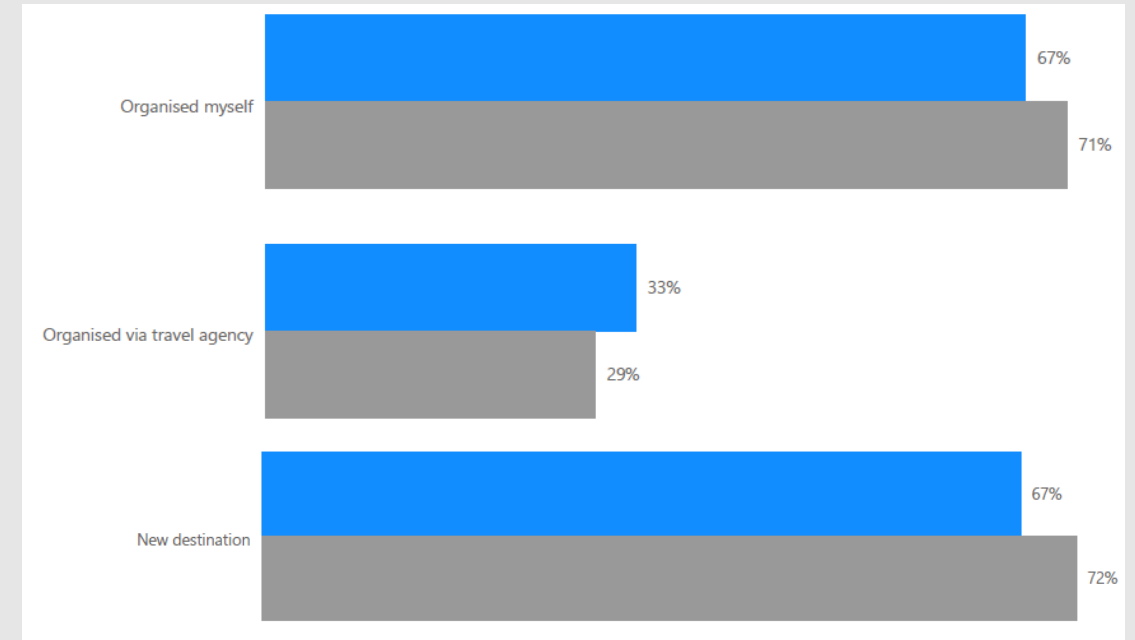
— Average **European source markets**, total vs. Germany



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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