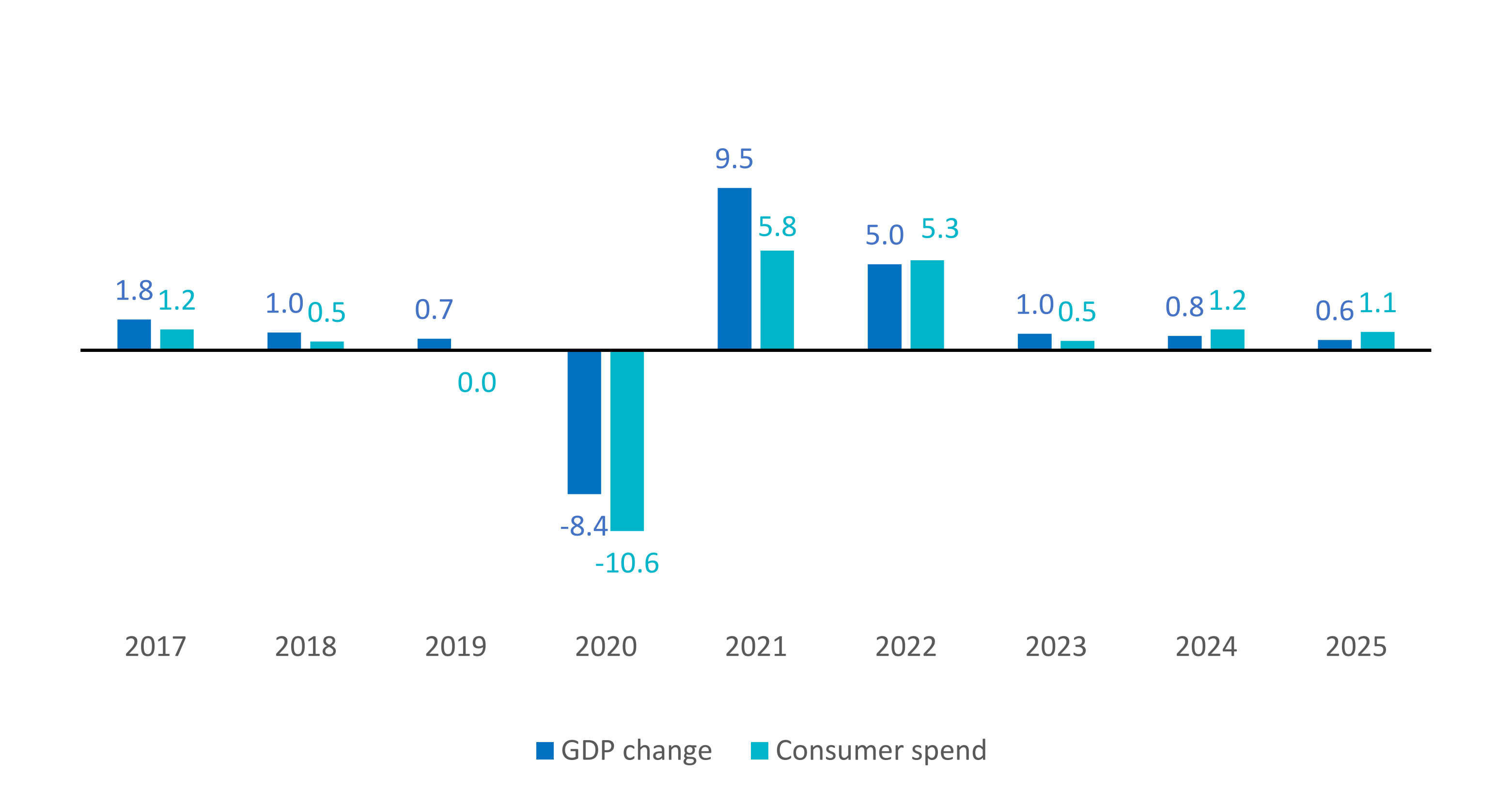
Luxembourg for Tourism

Market profile ITALY 2025

Economic indicators & General Travel Demand

Economic indicators – General travel demand

GDP and consumer spending, % annual change



Economy & population

GDP (PPP, $) per capita
53,606

Unemployment (%)
6.1

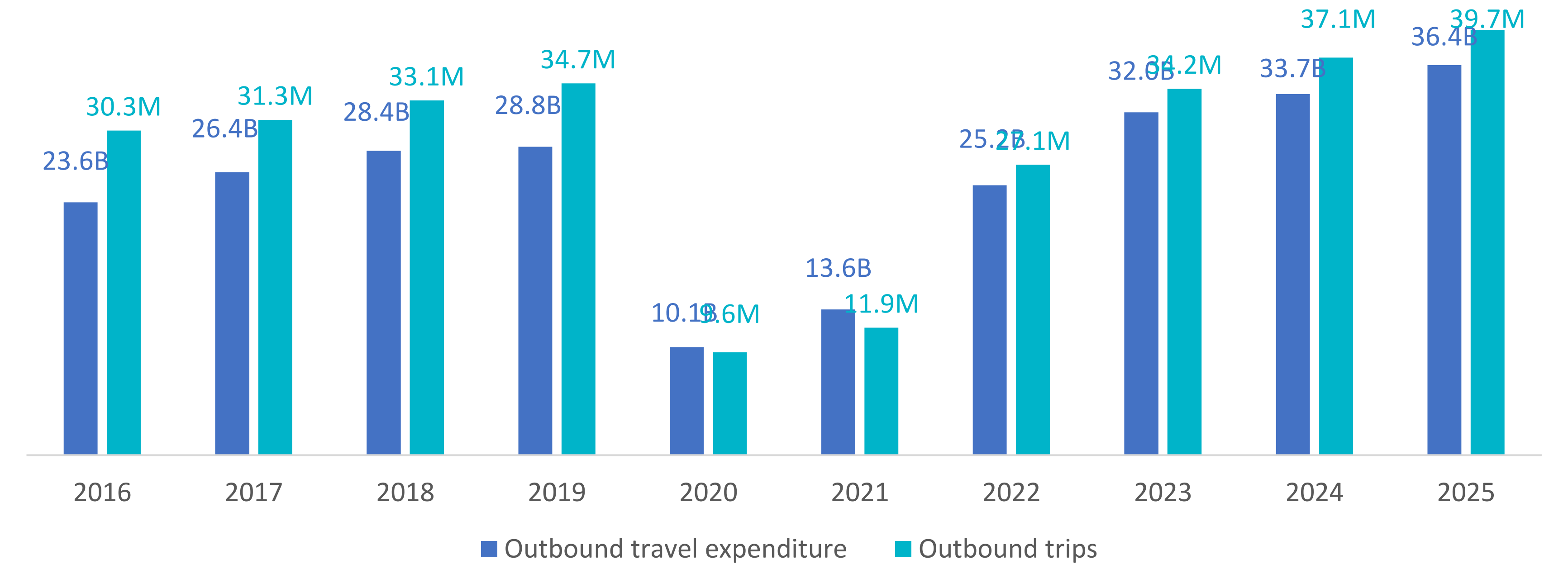
Inflation(%)
1.5

Population
59,146,260

Sources: Oxford Economics, United Nations, World Bank.

Economic indicators – General travel demand

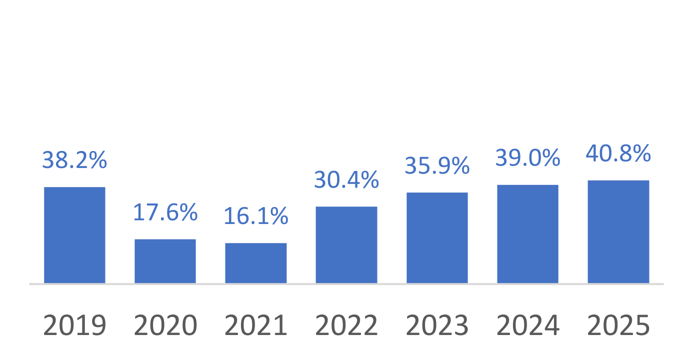
Outbound trips and travel expenditure



Outbound travel intensity
0.67 trips
per inhabitant (2025)

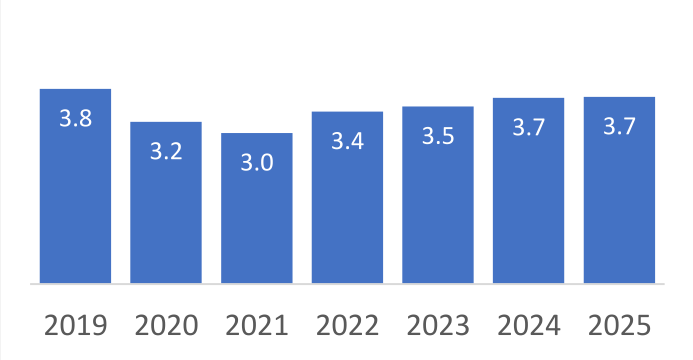
Average spend
per outbound trip (2025)
917 $

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2025)
88%

Average length of stay,
nights, all outbound trips



Sources: Oxford Economics.

Arrivals & nights in paid accommodation

Nights in paid accommodation

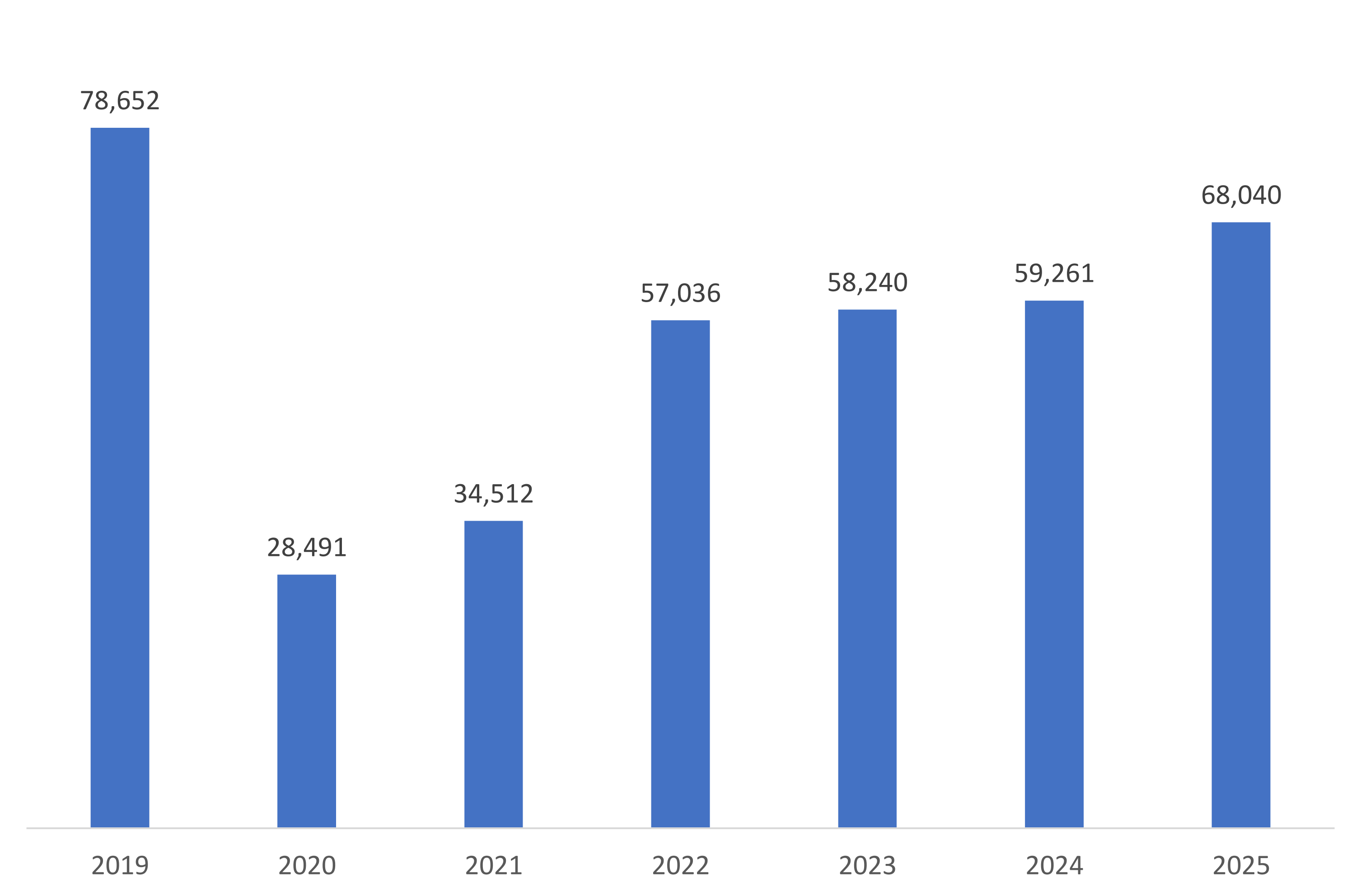
2025 and 2019-2025

Nights,
paid accommodation, 2025

68.040

+15% (vs. 2024)

-13% (vs. 2019)



Source: Statec

Arrivals in paid accommodation

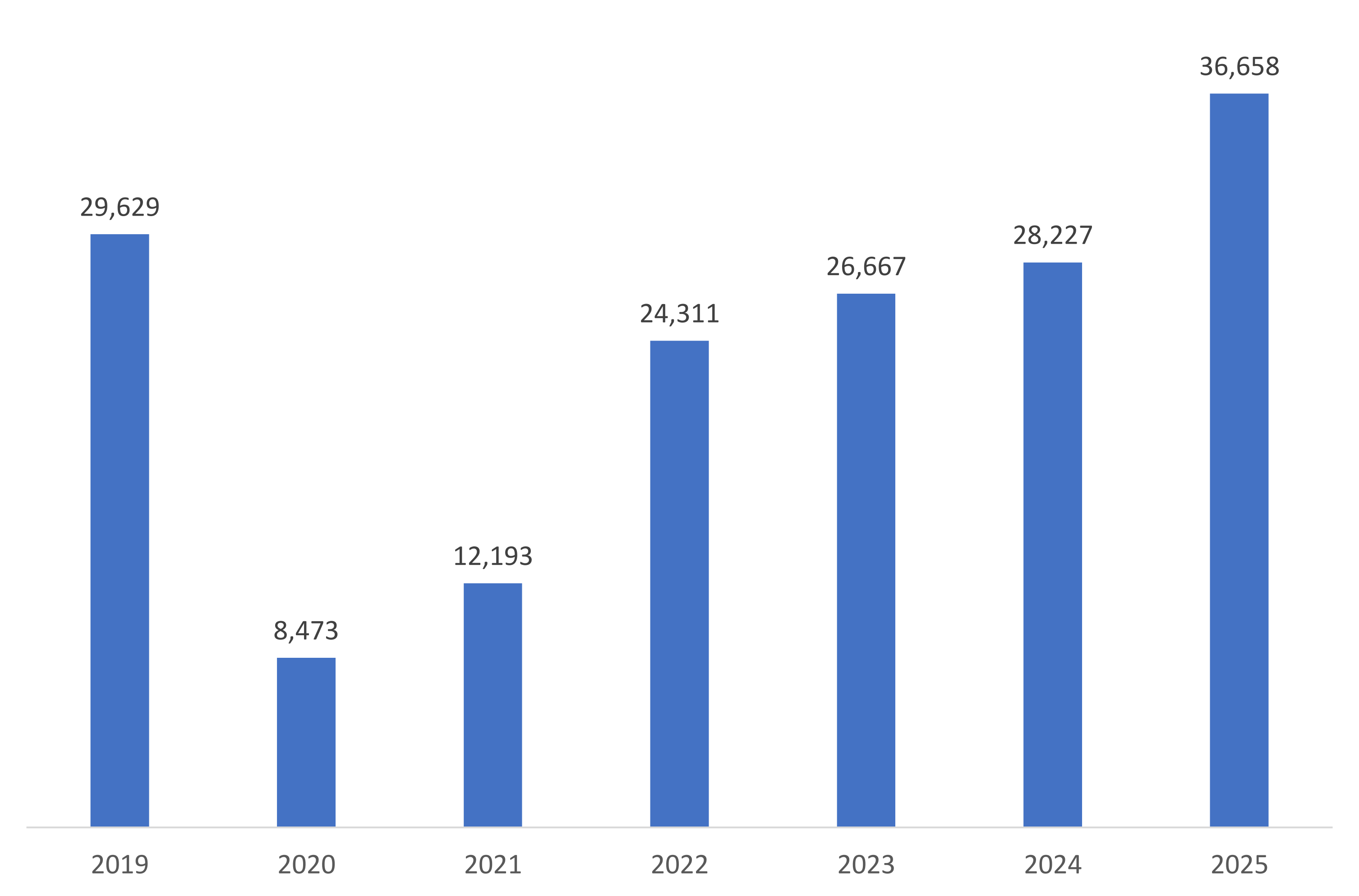
2025 and 2019-2025

Arrivals, paid accommodation, 2025

36.658

+30% (vs. 2024)

+24% (vs. 2019)



Source: Statec

Length of stay, paid accommodation

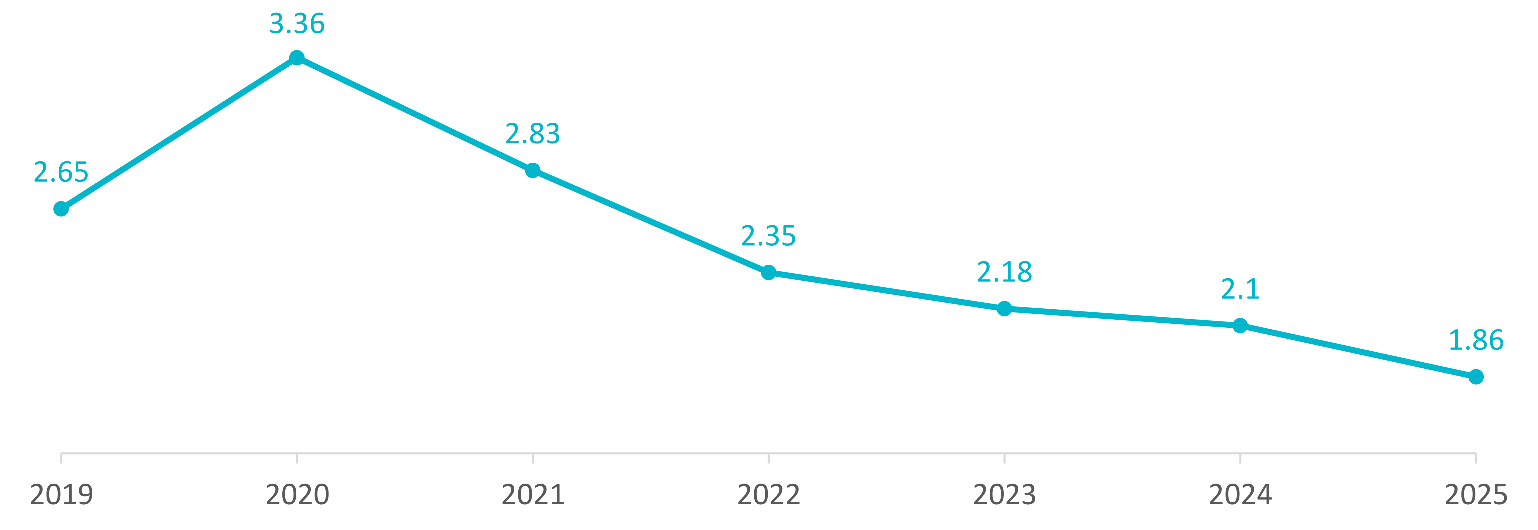
2025 and 2019-2025

Average length of stay, paid accommodation, 2025

1.86 nights

-0.24 nights (vs. 2024)

-0.79 nights (vs. 2019)

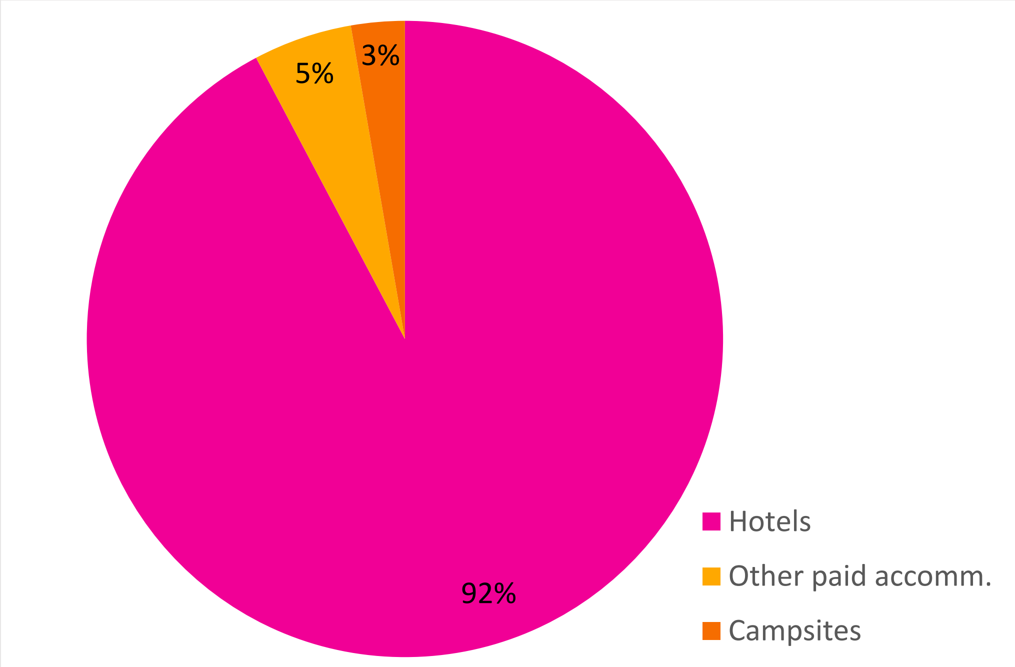


Source: Statec

Nights & arrivals in paid accommodation

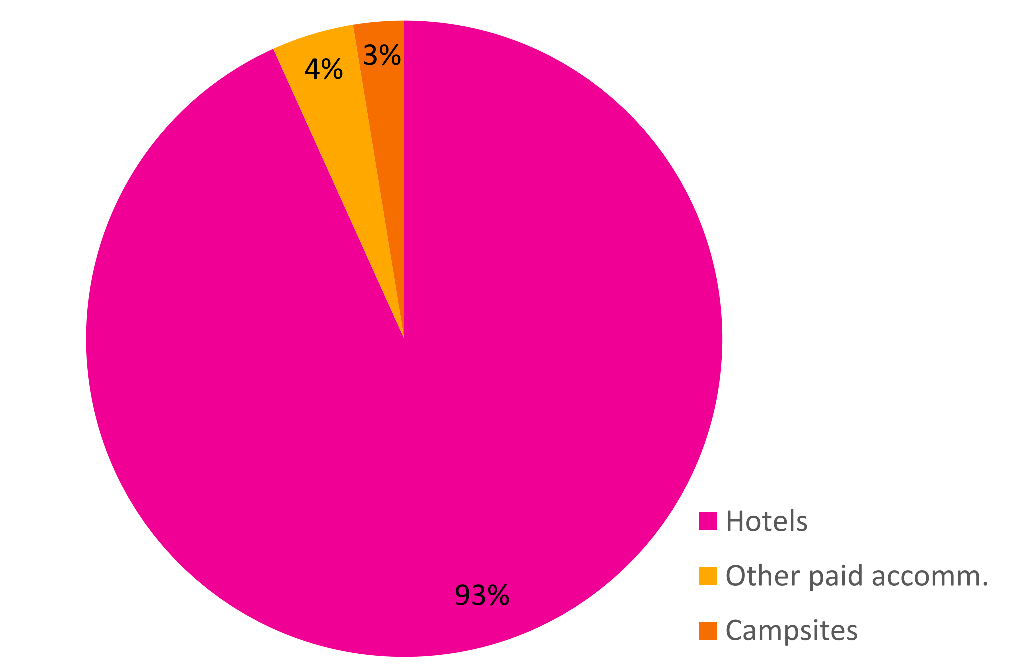
Type of accommodation, 2025

Nights, paid accommodation, 2025



Hotels	62.768	+16% (vs. 2024)	-10% (vs. 2019)
Other paid accomm.	3.419	+5% (vs. 2024)	-47% (vs. 2019)
Campsites	1.853	+1% (vs. 2024)	-28% (vs. 2019)

Arrivals, paid accommodation, 2025



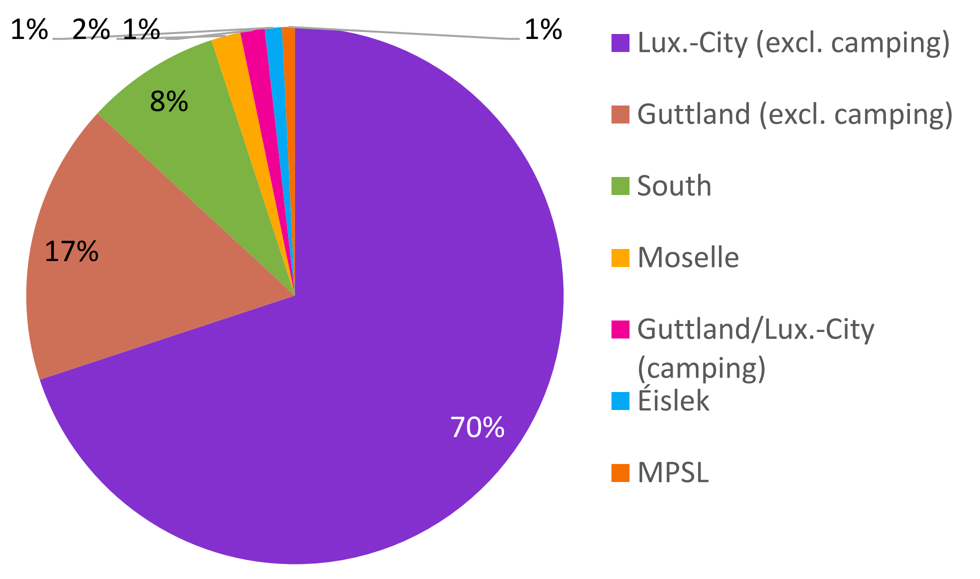
Hotels	34.183	+32% (vs. 2024)	+30% (vs. 2019)
Other paid accomm.	1.532	+3% (vs. 2024)	-31% (vs. 2019)
Campsites	943	+2% (vs. 2024)	-11% (vs. 2019)

Source: Statec

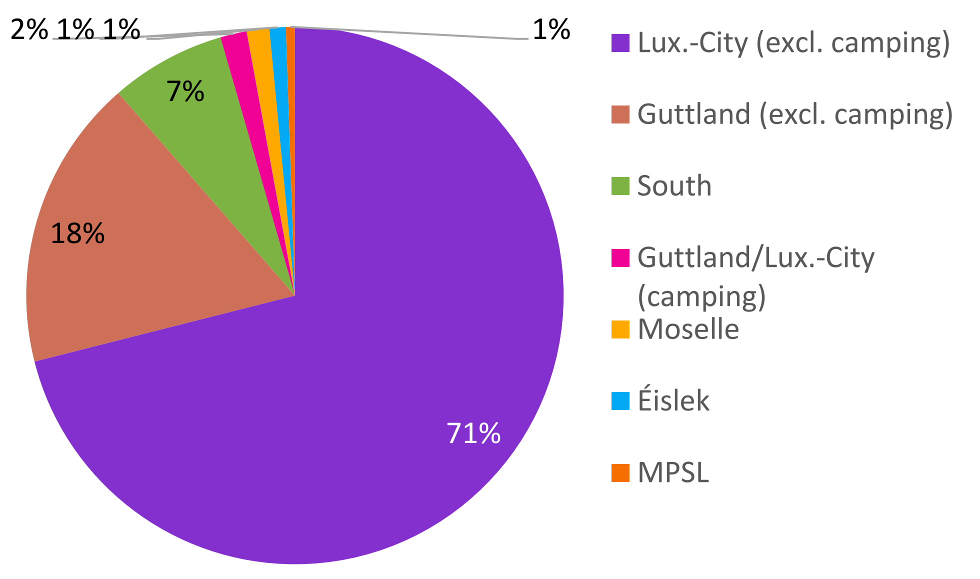
Nights & arrivals in paid accommodation

Regions, 2025

Nights, paid accommodation, 2025



Arrivals, paid accommodation, 2025



Lux.-City (excl. camping)	47.581	+25% (vs. 2024)	+25% (vs. 2019)
Guttland (excl. camping)	11.520	+6% (vs. 2024)	-23% (vs. 2019)
South	5.516	-11% (vs. 2024)	-72% (vs. 2019)
Moselle	1.203	+36% (vs. 2024)	-17% (vs. 2019)
Guttland/Lux.-City (camping)	998	+34% (vs. 2024)	-9% (vs. 2019)
Éislek	700	-54% (vs. 2024)	-69% (vs. 2019)
MPSL	522	-43% (vs. 2024)	-39% (vs. 2019)

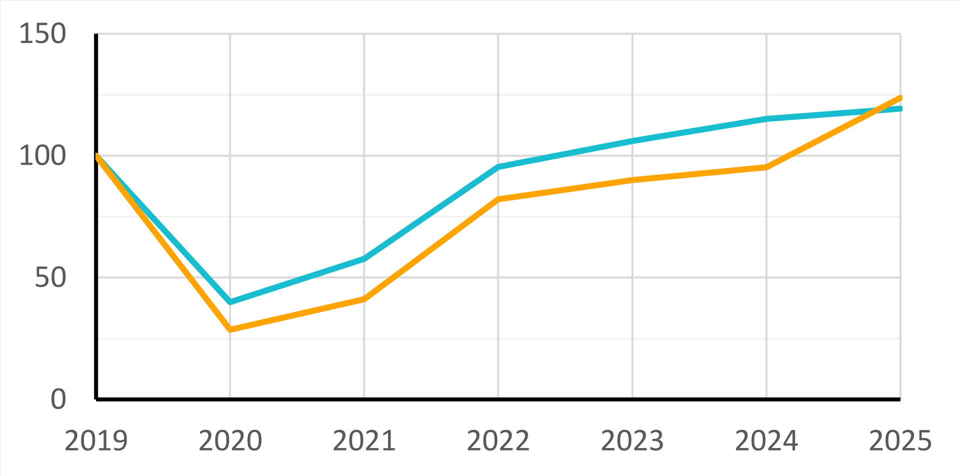
Lux.-City (excl. camping)	26.046	+47% (vs. 2024)	+82% (vs. 2019)
Guttland (excl. camping)	6.428	+4% (vs. 2024)	-16% (vs. 2019)
South	2.545	+1% (vs. 2024)	-51% (vs. 2019)
Guttland/Lux.-City (camping)	583	+21% (vs. 2024)	-26% (vs. 2019)
Moselle	497	+14% (vs. 2024)	-26% (vs. 2019)
Éislek	361	-31% (vs. 2024)	-38% (vs. 2019)
MPSL	198	-43% (vs. 2024)	-53% (vs. 2019)

Source: Statec

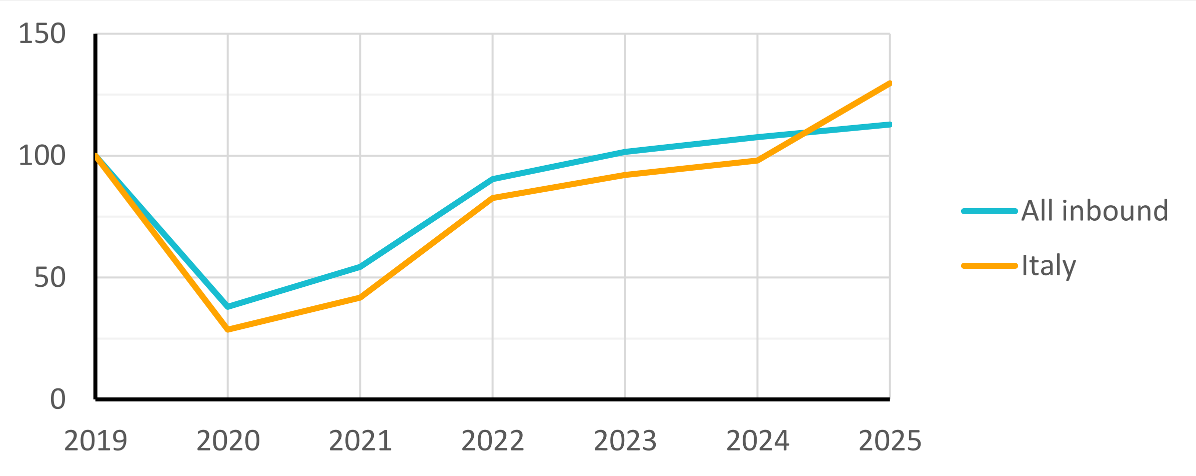
Arrivals in paid accommodation

Trends 2019-2025

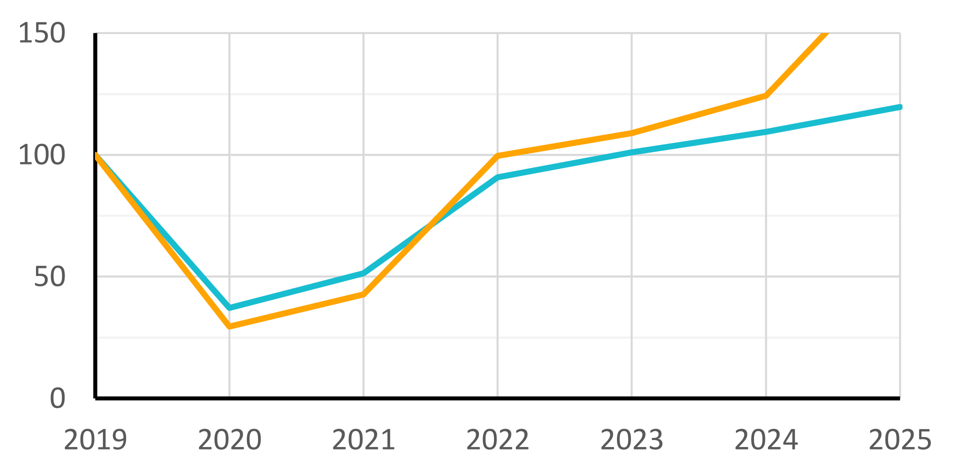
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

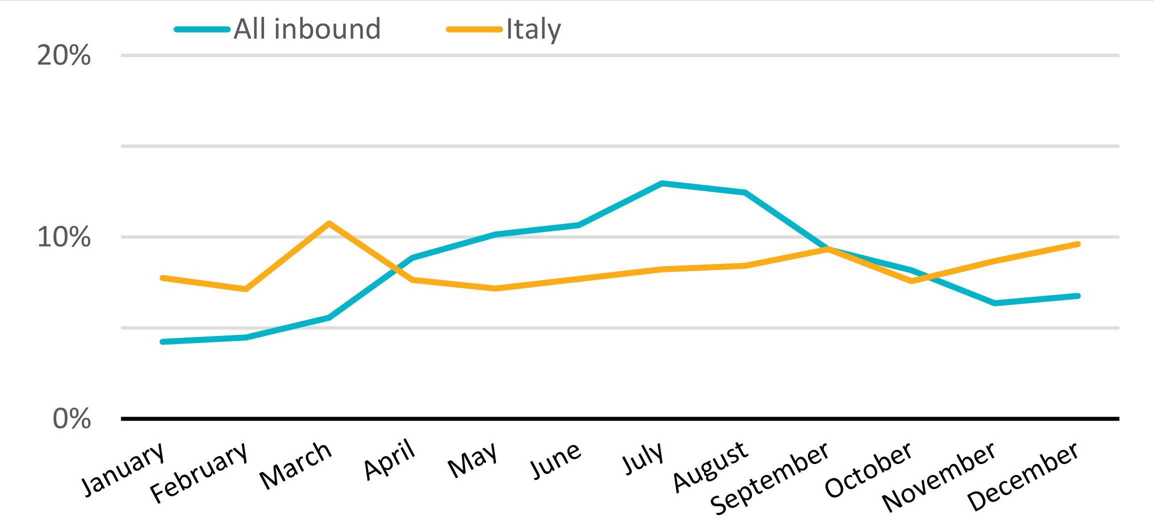


(*) excluding camping.
Source: Statec

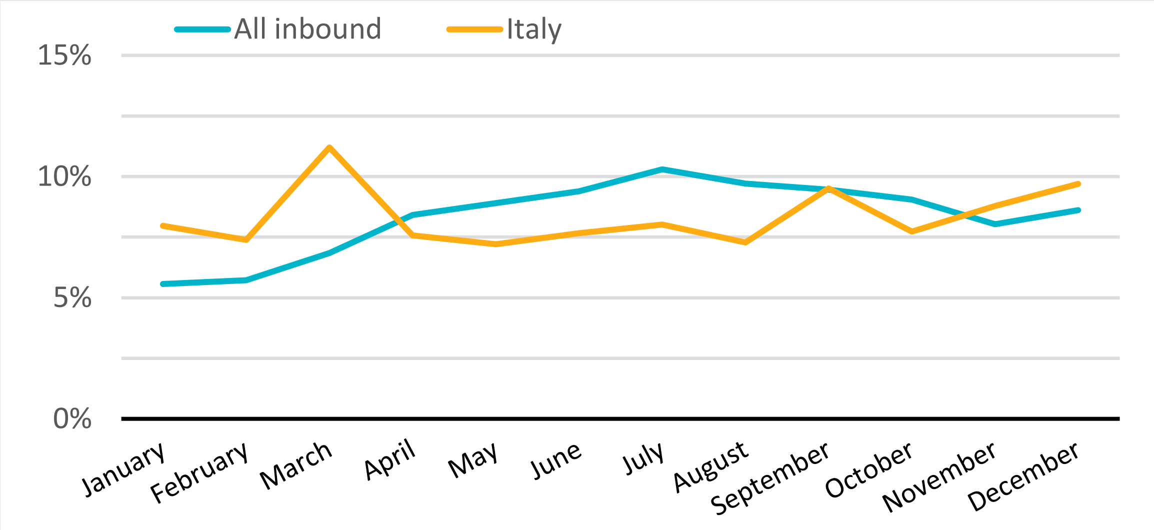
Arrivals in paid accommodation

Seasonality

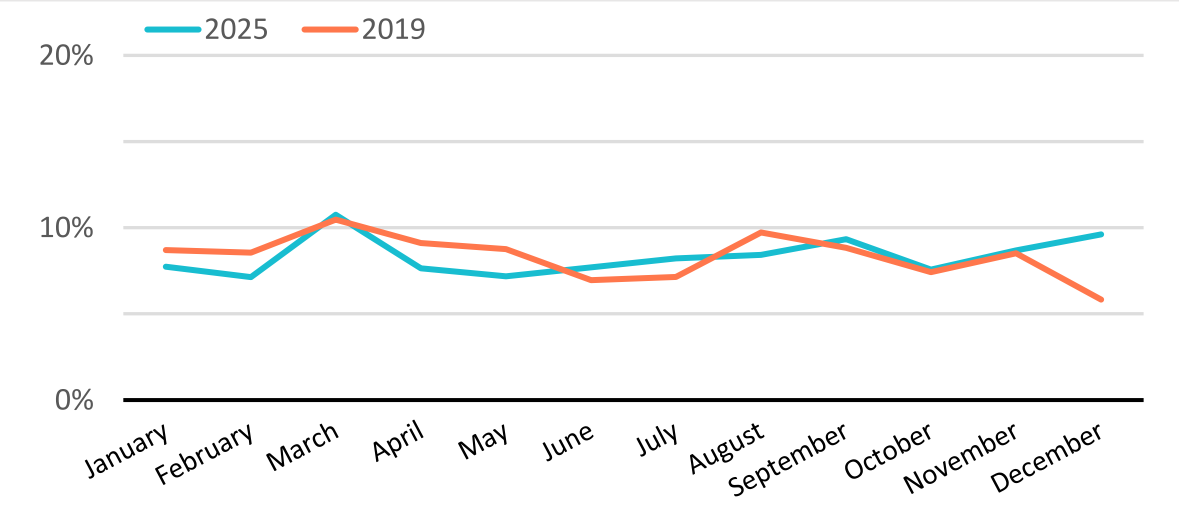
All paid accommodation, 2025



Hotels, 2025



All paid accommodation, arrivals from Italy



Source: Statec

Short-term rentals

2025 and 2019-2025

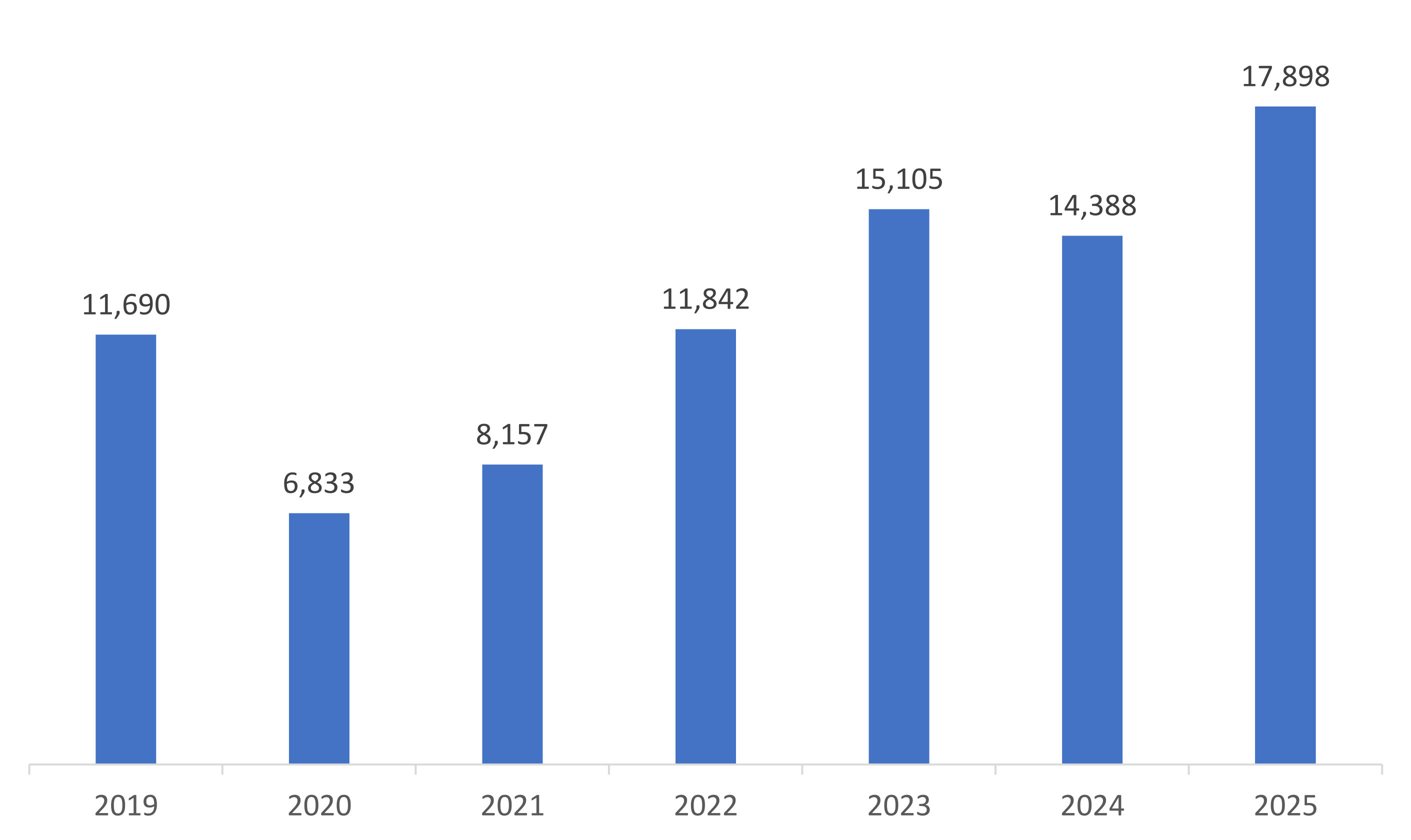
Nights,
Short-term rentals, 2025

17.898

+24% (vs. 2024)

+53% (vs. 2019)

Nights,
Short-term rentals, 2019-2025

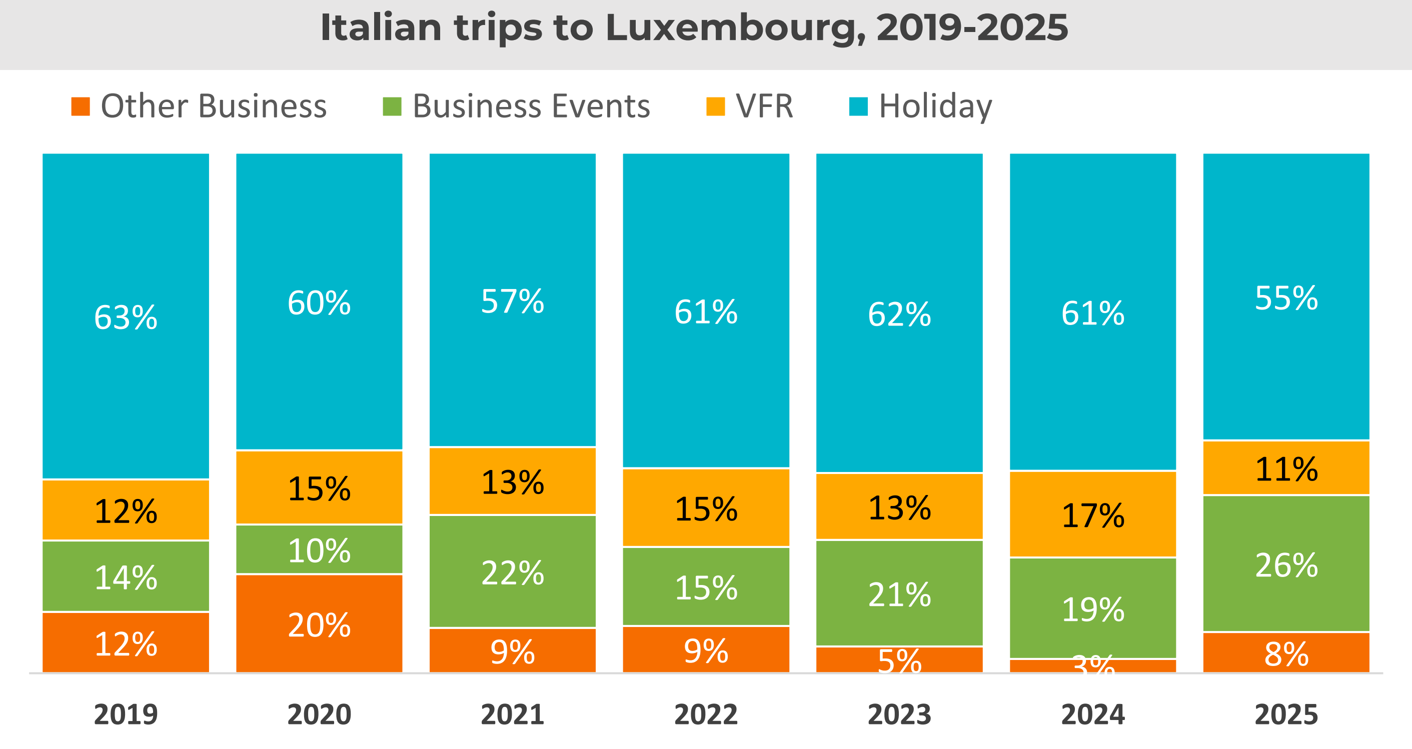


Source: Eurostat (experimental statistics).

Characteristics of inbound trips

Italian trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2019-2025



2025

	Italy to Luxembourg	Europe to Luxembourg
Holiday	55%	62%
VFR	11%	12%
Business Events	26%	17%
Other Business	8%	8%

Source: World Travel Monitor/IPK International.

Inbound same-day trips to Luxembourg

2025

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

57.000

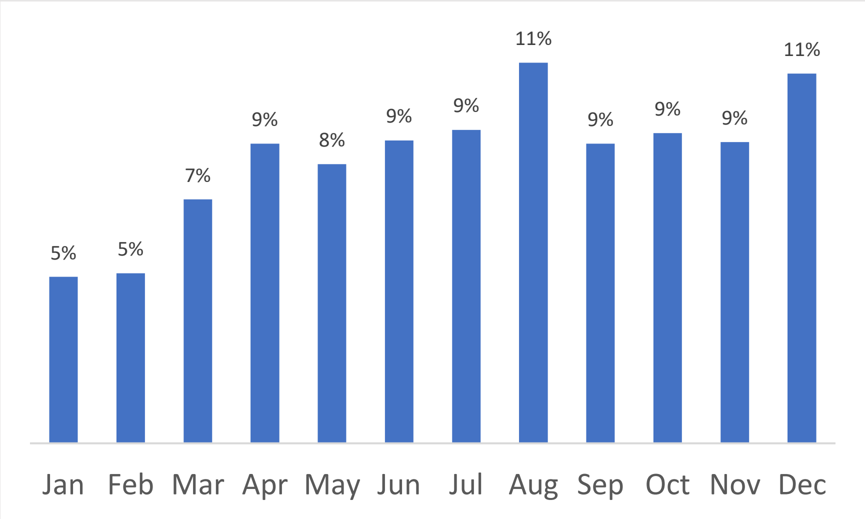
+30% (vs. 2024)

Average length of same-day trips

8,7 h

+0,2 h (vs. 2024)

Seasonality
% of same-day trips

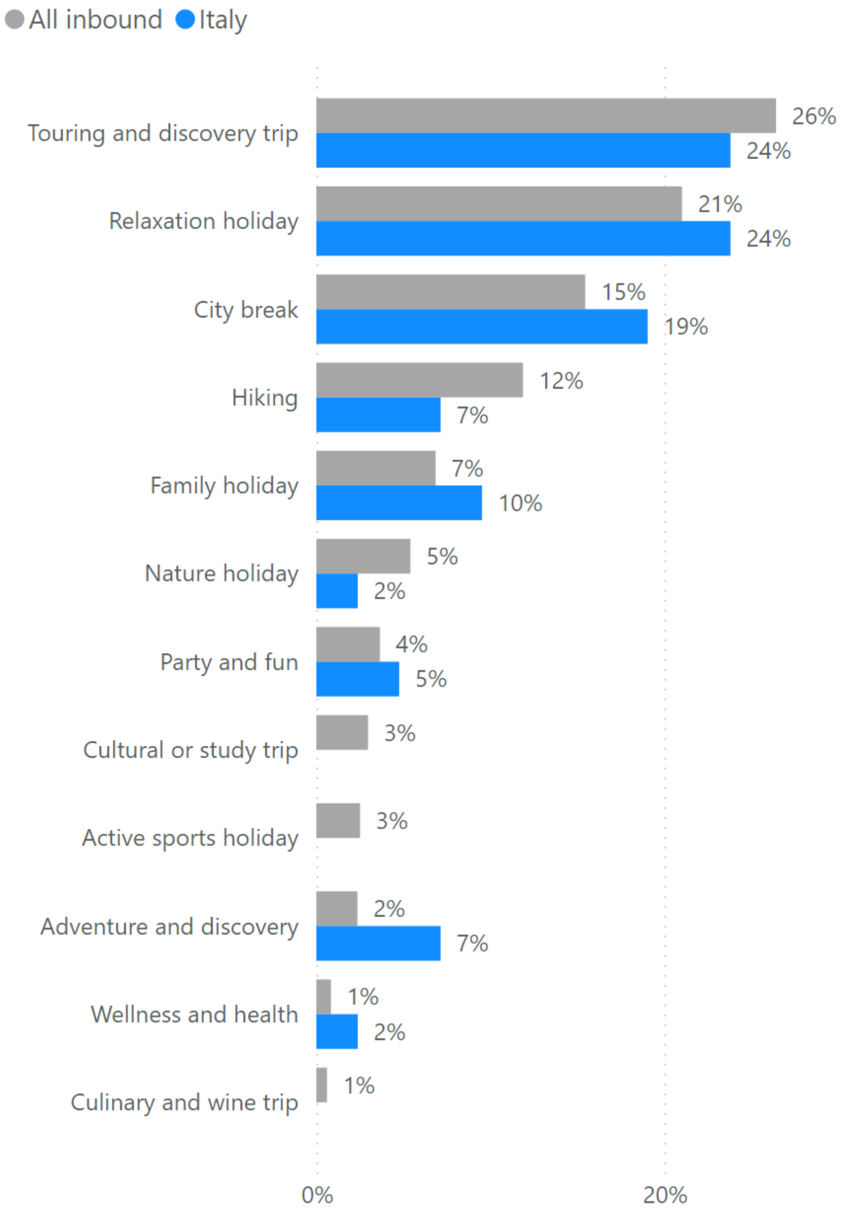


Sources: LFT estimates, Mobile phone data (Editus/LFT), LFT/Ilres Visitor Survey.

Travel behaviour of inbound leisure visitors

Main holiday types

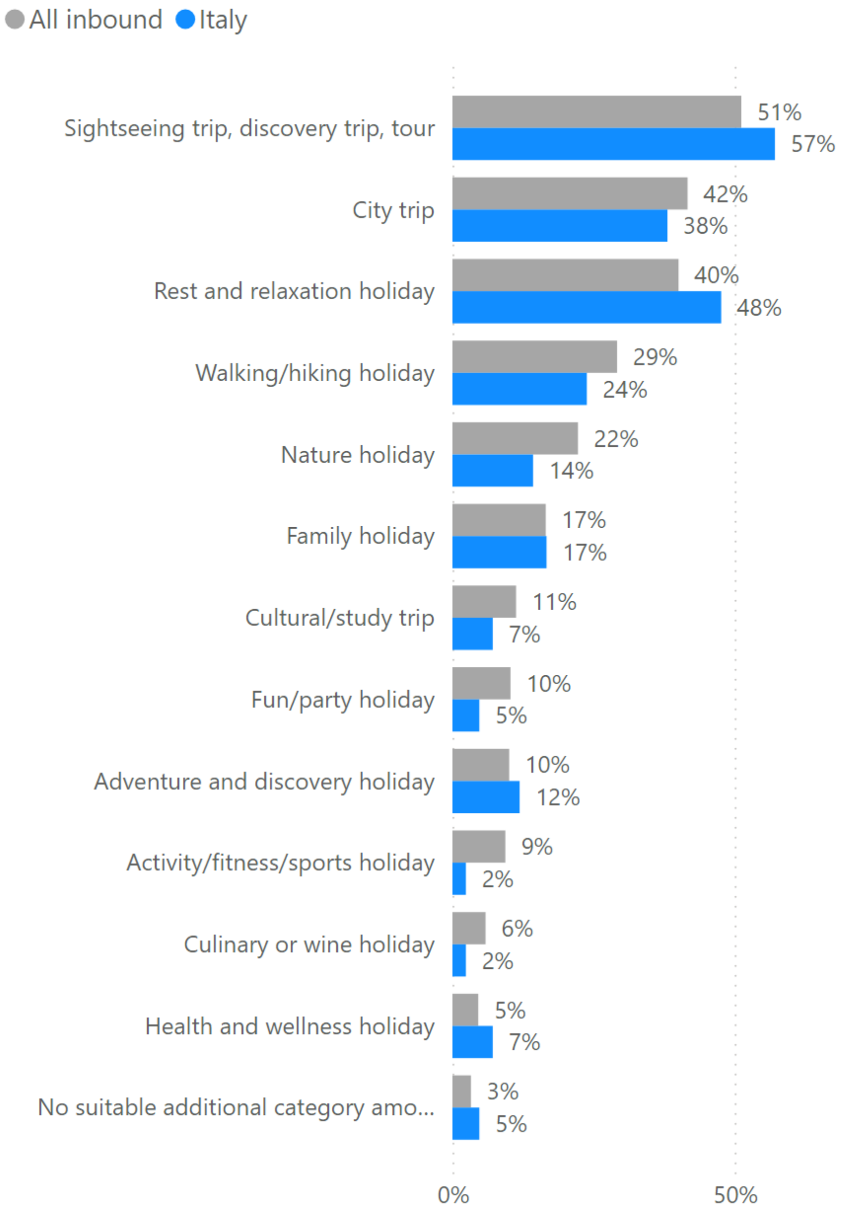
Leisure overnight visitors, 2024–2025



Low N for this question for segment(s): Italy (N=42)

All holiday types

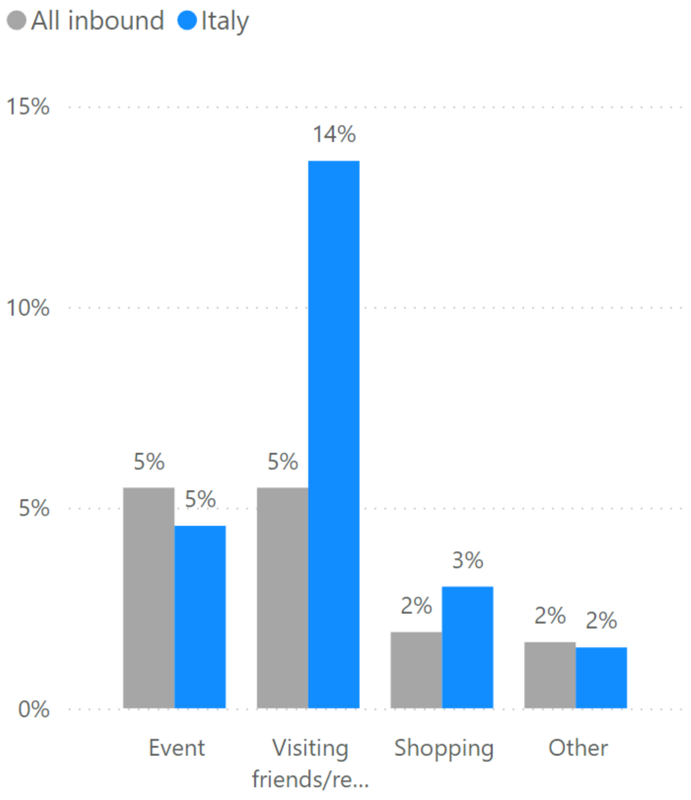
Leisure overnight visitors, 2024–2025



Low N for this question for segment(s): Italy (N=42)

Main purpose of overnight trip (if not holiday)

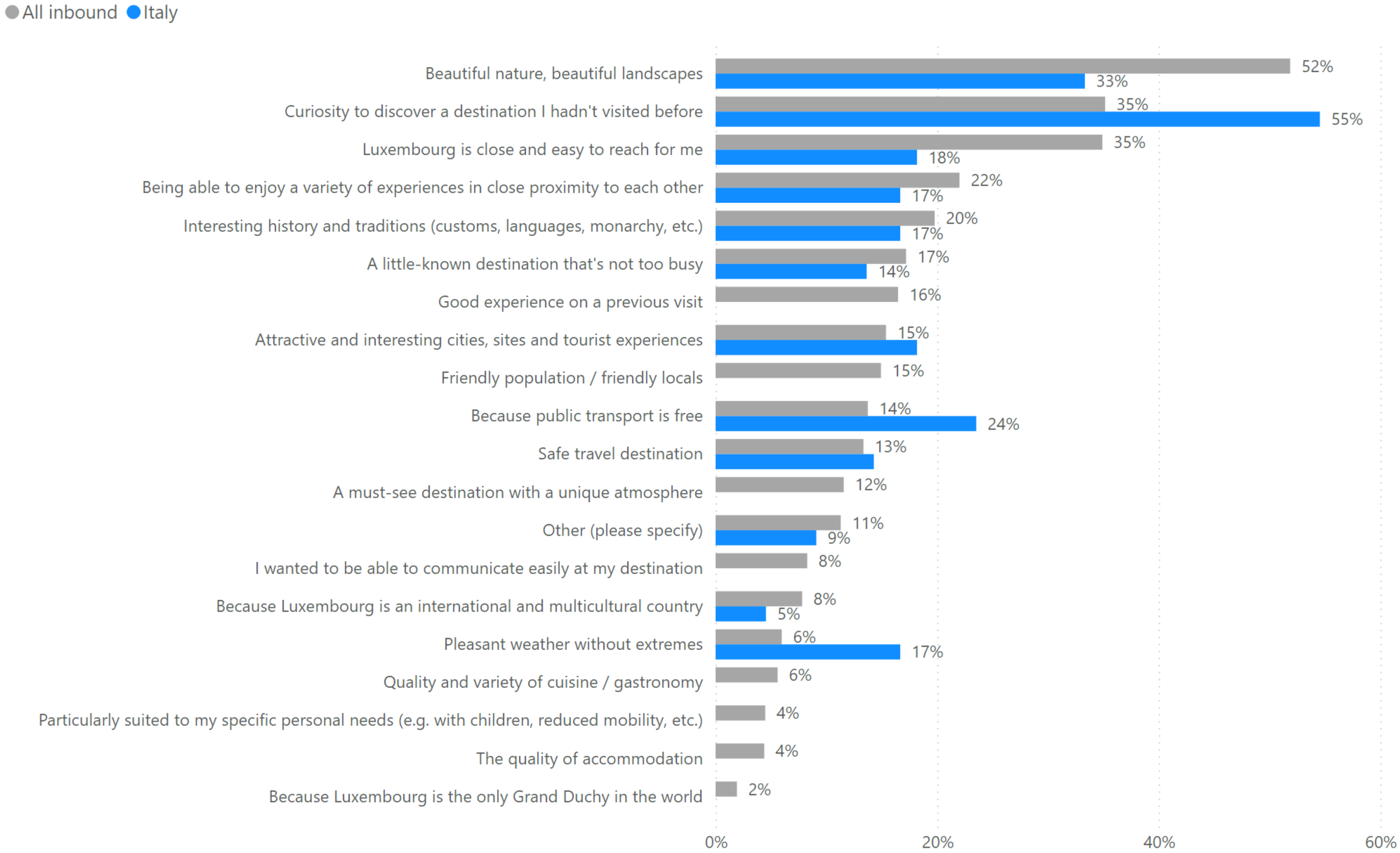
Leisure overnight visitors, 2024–2025



Source: LFT/Ilres Visitor Survey.

Reasons for choosing Luxembourg

Leisure overnight visitors, 2022–2025

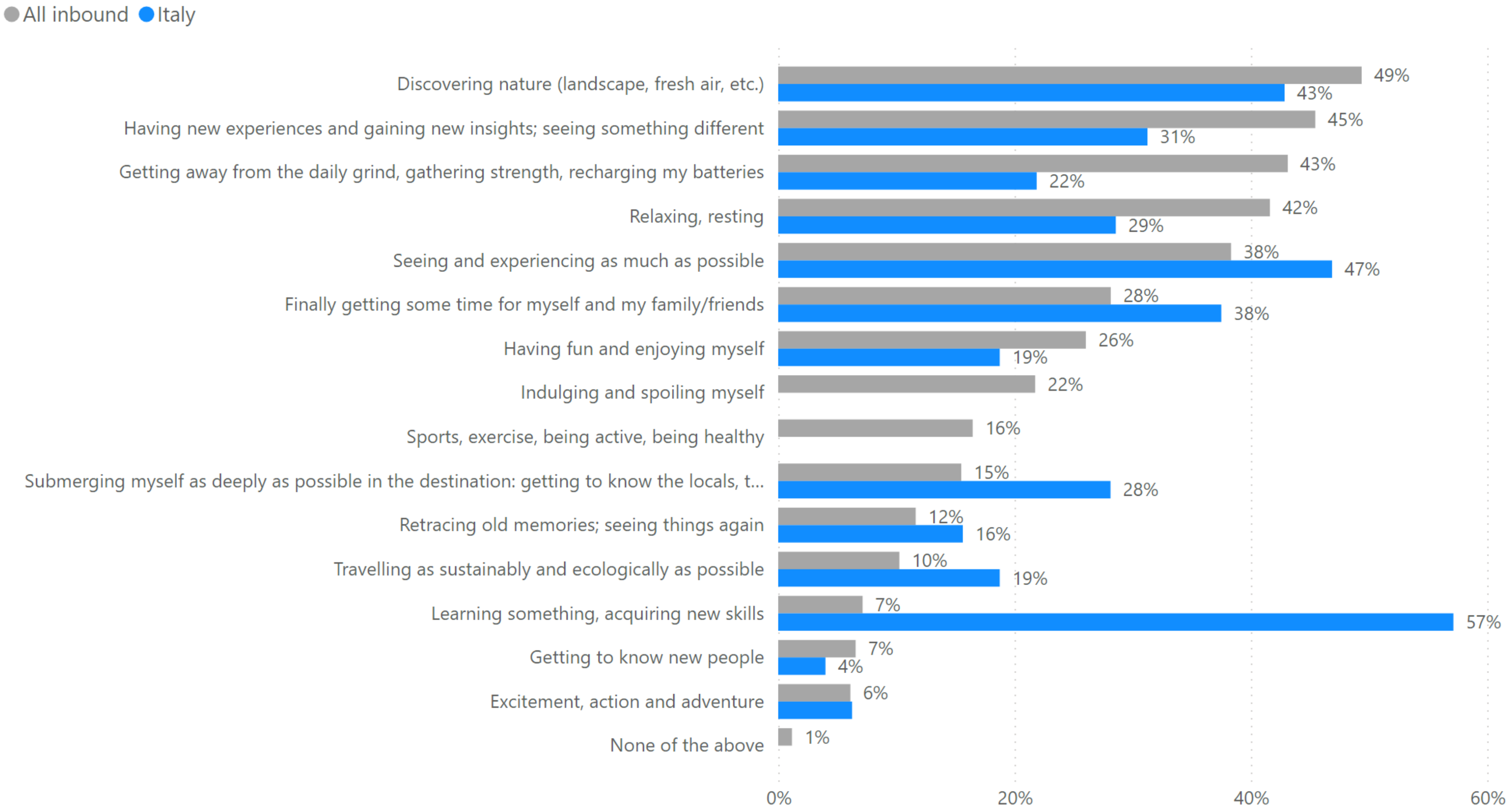


Low N for this question for segment(s): Italy (N=22)

Source: LFT/Ilres Visitor Survey.

Travel Motives

Leisure overnight visitors, 2022–2025

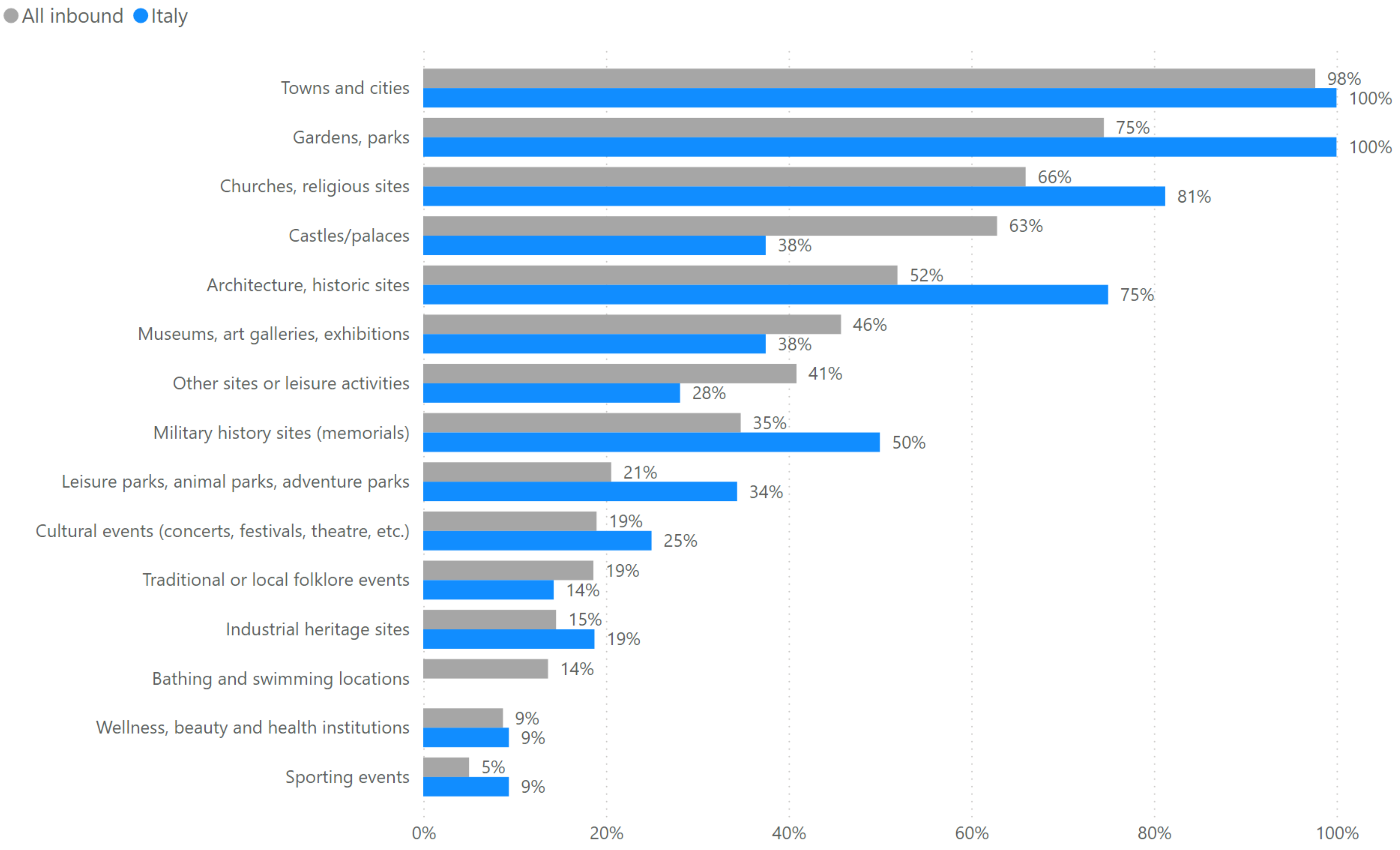


Low N for this question for segment(s): Italy (N=32)

Source: LFT/Ilres Visitor Survey.

Places visited

Leisure overnight visitors, 2022–2025

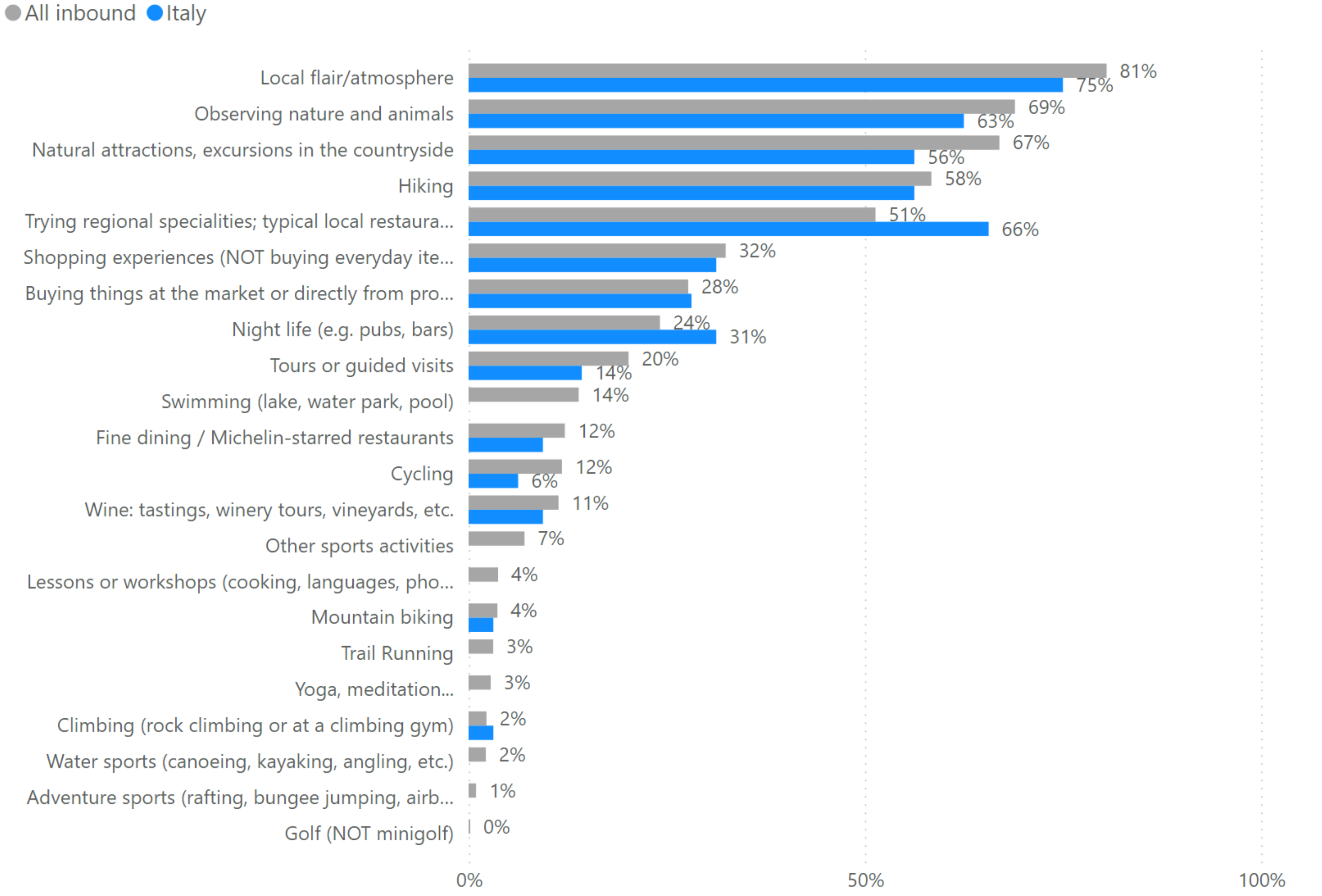


Low N for this question for segment(s): Italy (N=32)

Source: LFT/Ilres Visitor Survey.

Acitivities (sporting and non-sporting)

Leisure overnight visitors, 2022–2025

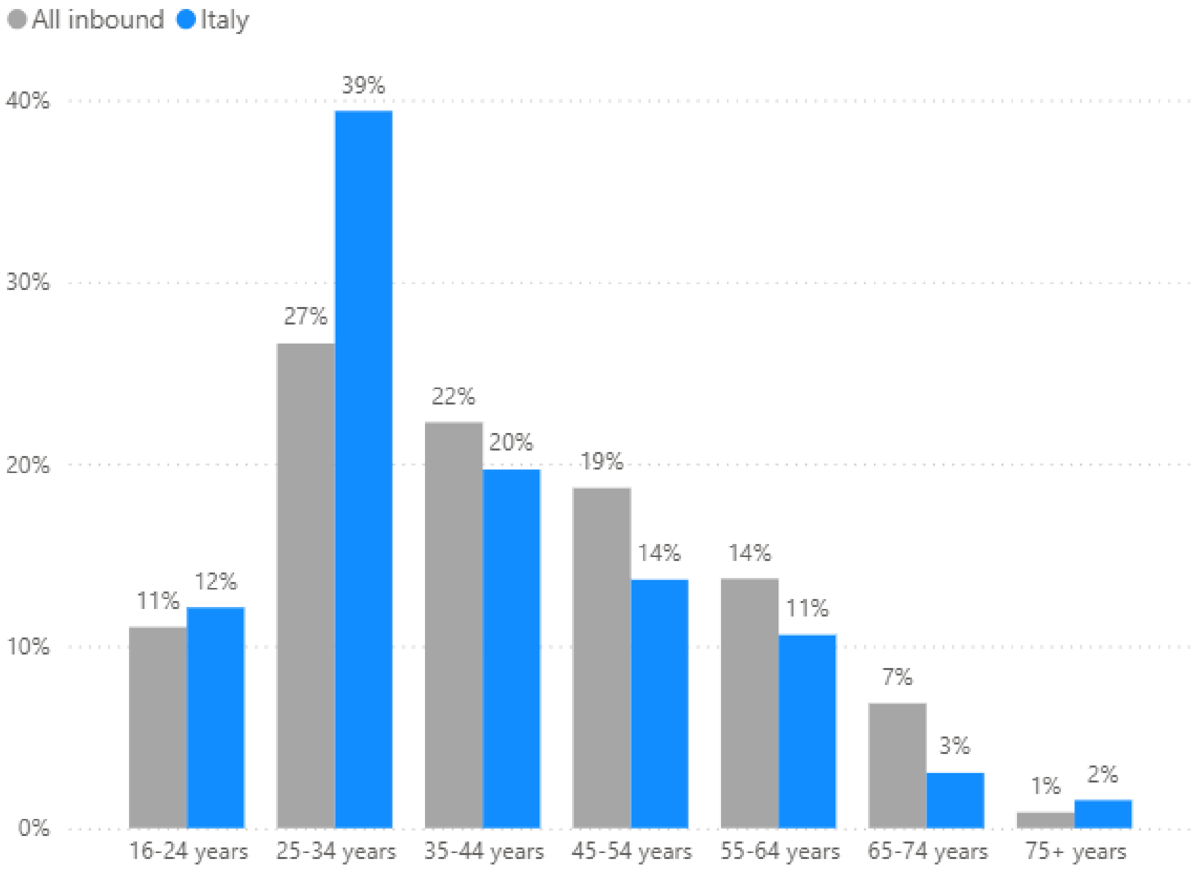


Low N for this question for segment(s): Italy (N=32)

Source: LFT/Ilres Visitor Survey.

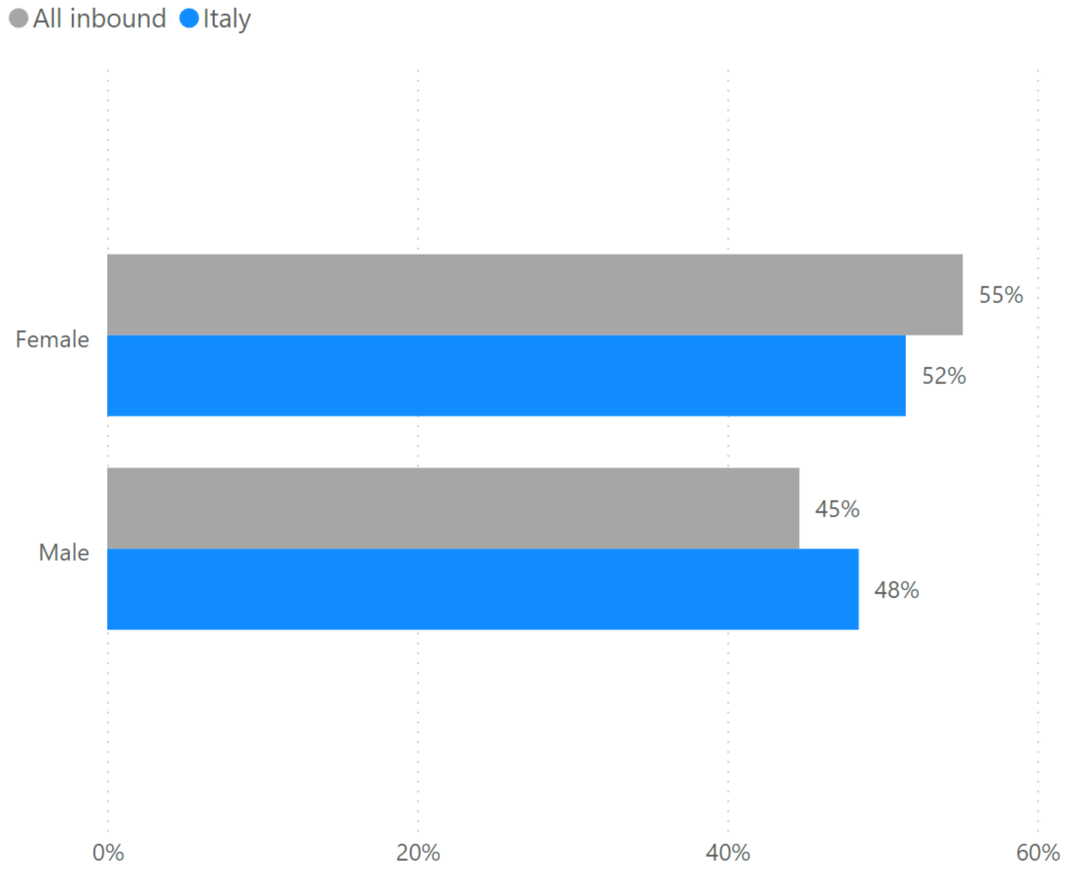
Age

Leisure overnight visitors, 2024–2025



Gender

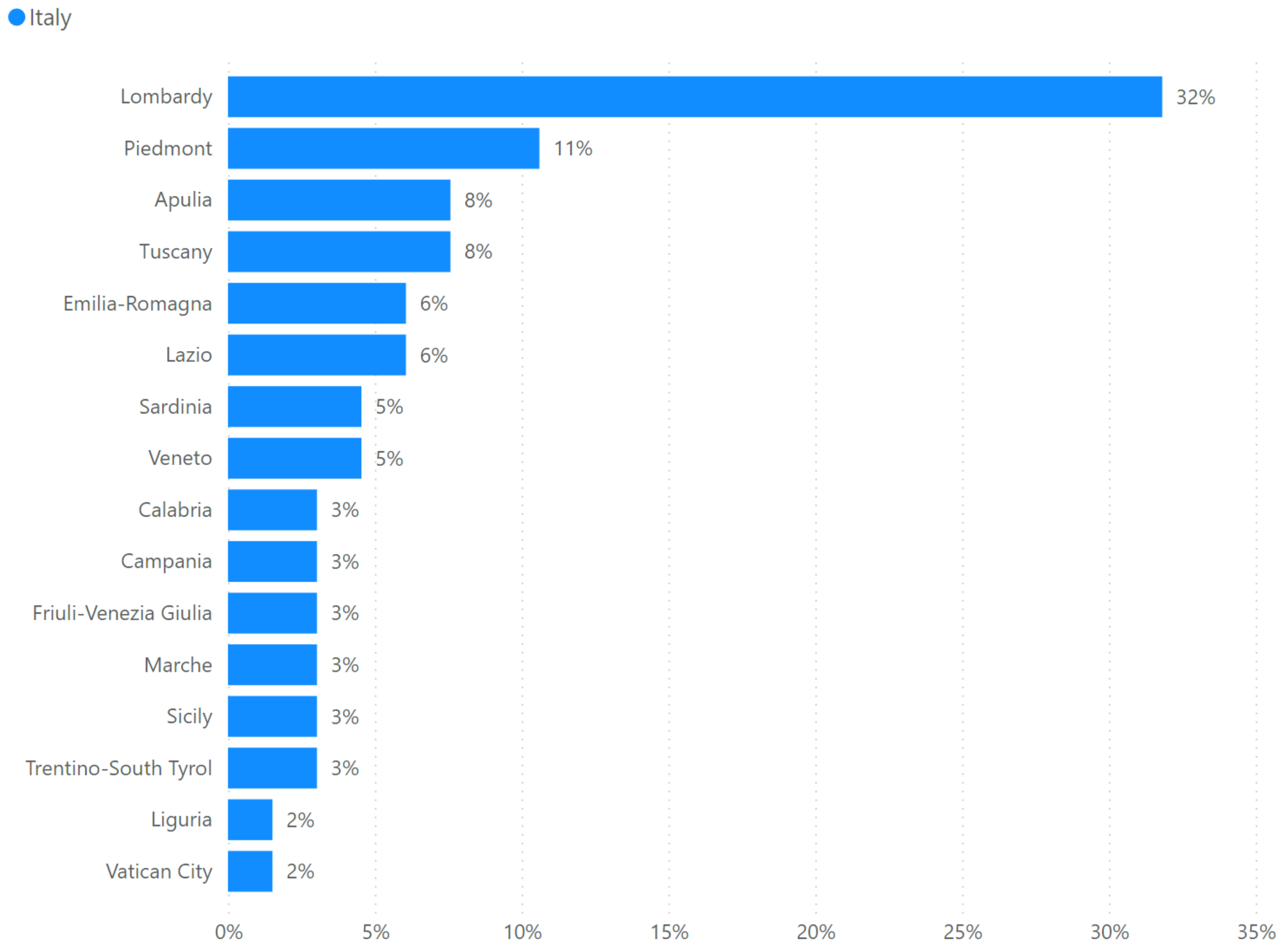
Leisure overnight visitors, 2024–2025



Source: LFT/Ilres Visitor Survey.

Region of origin

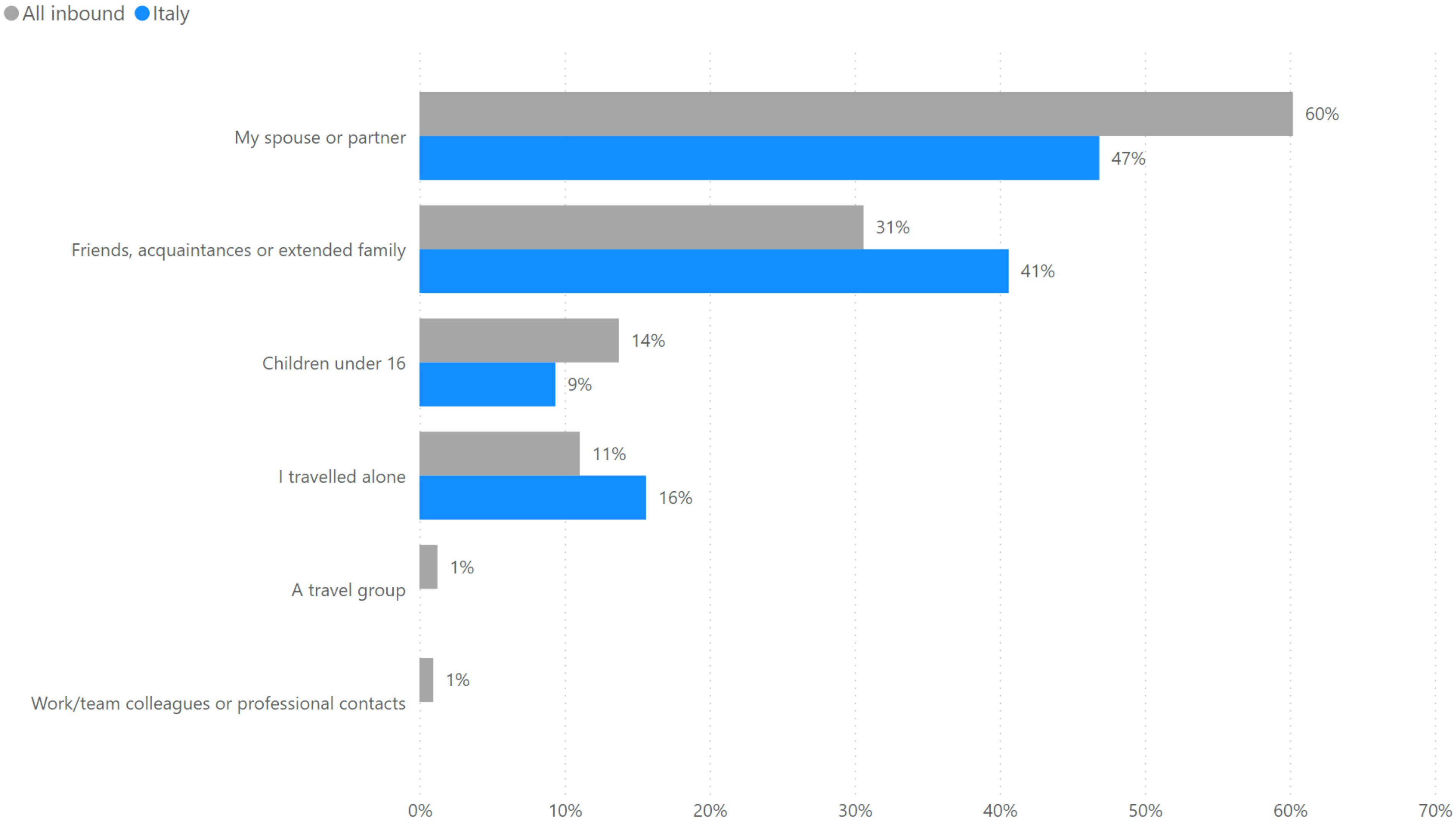
Leisure overnight visitors, 2024–2025



Source: LFT/Ilres Visitor Survey.

Travel party

Leisure overnight visitors, 2022–2025

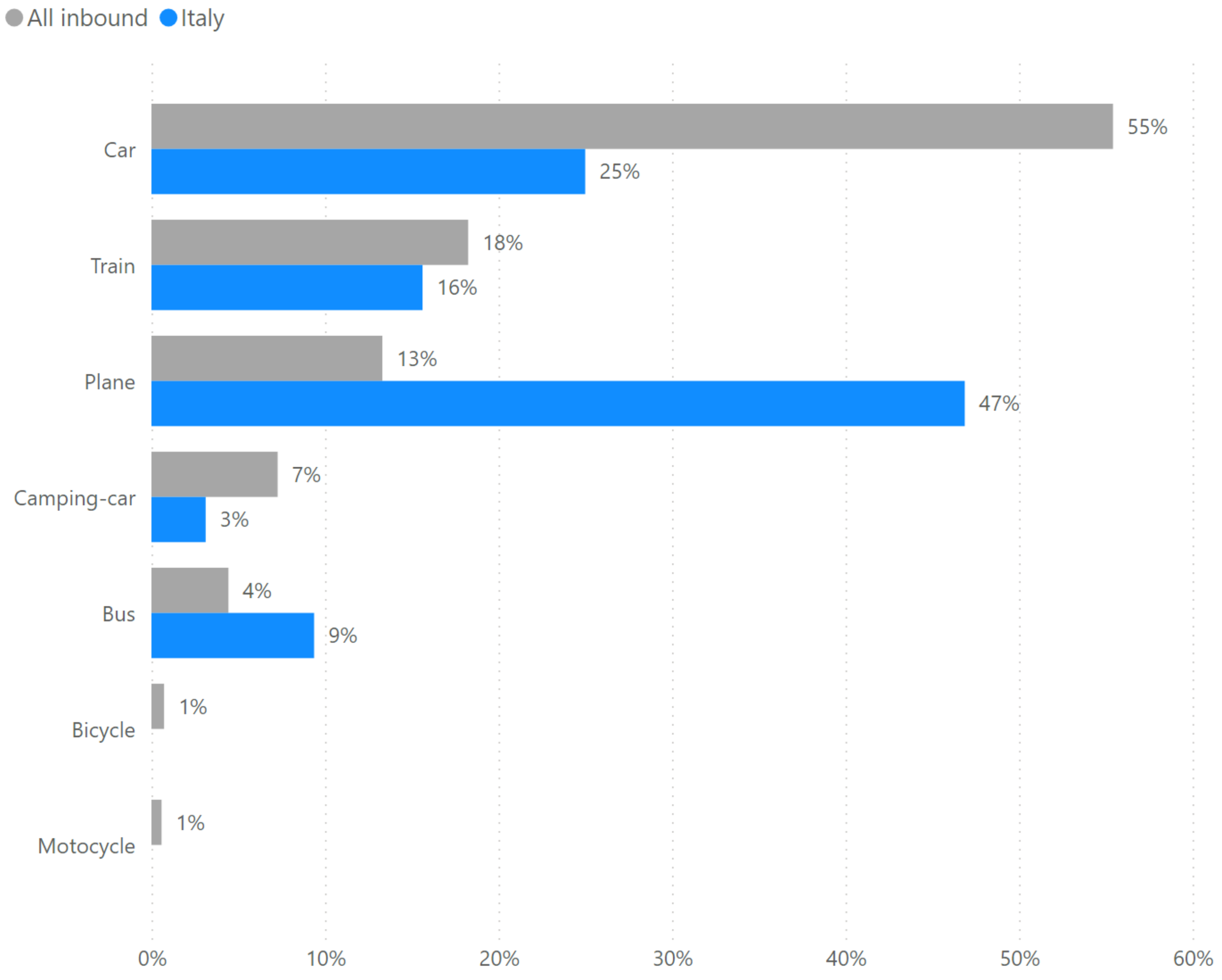


Low N for this question for segment(s): Italy (N=32)

Source: LFT/Ilres Visitor Survey.

Transport to destination

Leisure overnight visitors, 2022–2025



Low N for this question for segment(s): Italy (N=32)

First-time visitors

Leisure overnight visitors, 2024–2025

62%

All inbound

74%

Italy

Visitors spending nights in Luxembourg and abroad during same trip

Leisure overnight visitors, 2024–2025

38%

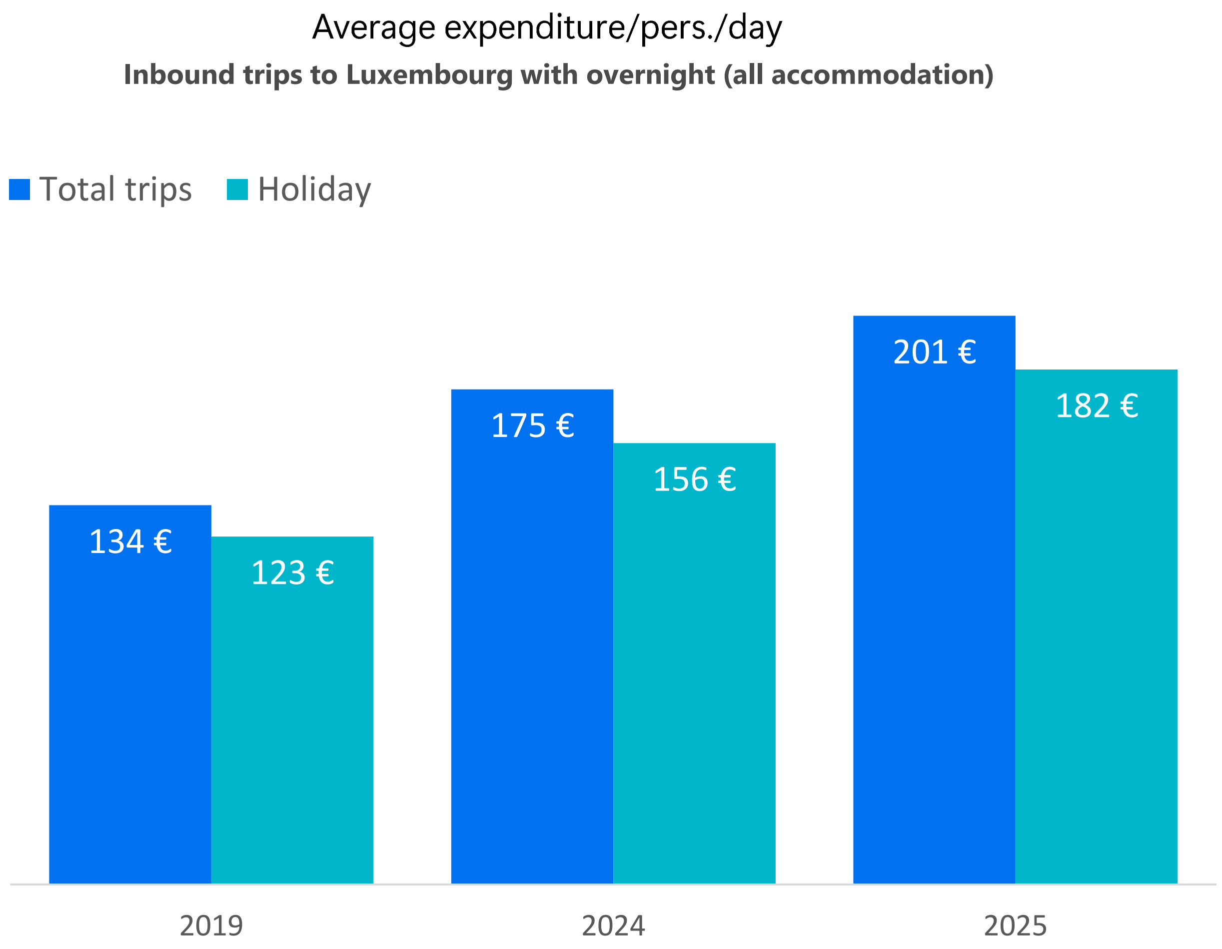
All inbound

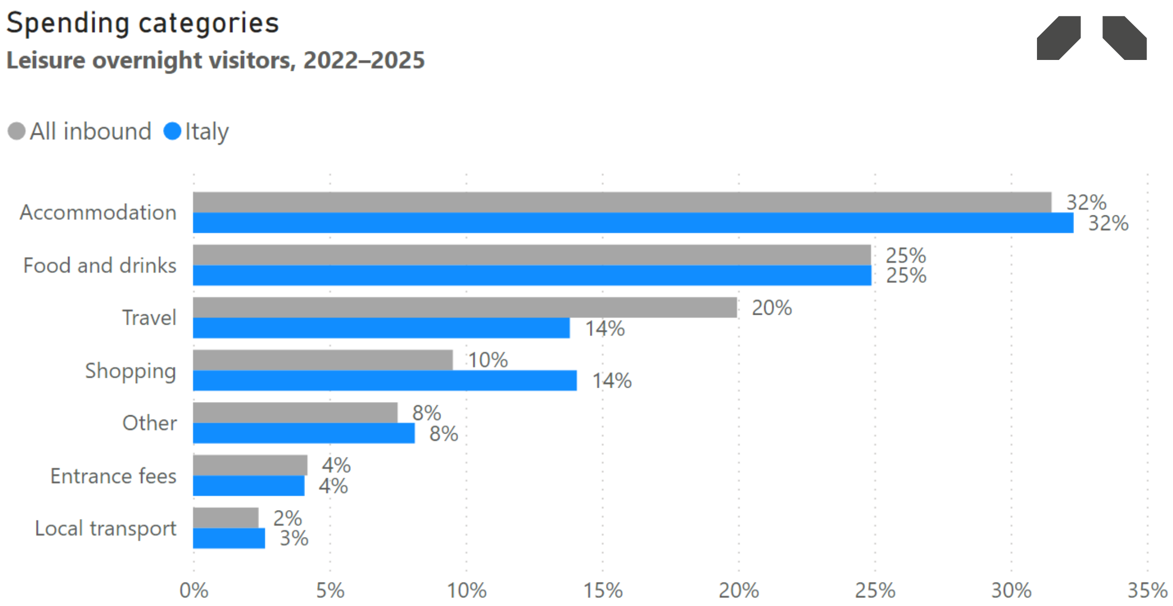
44%

Italy

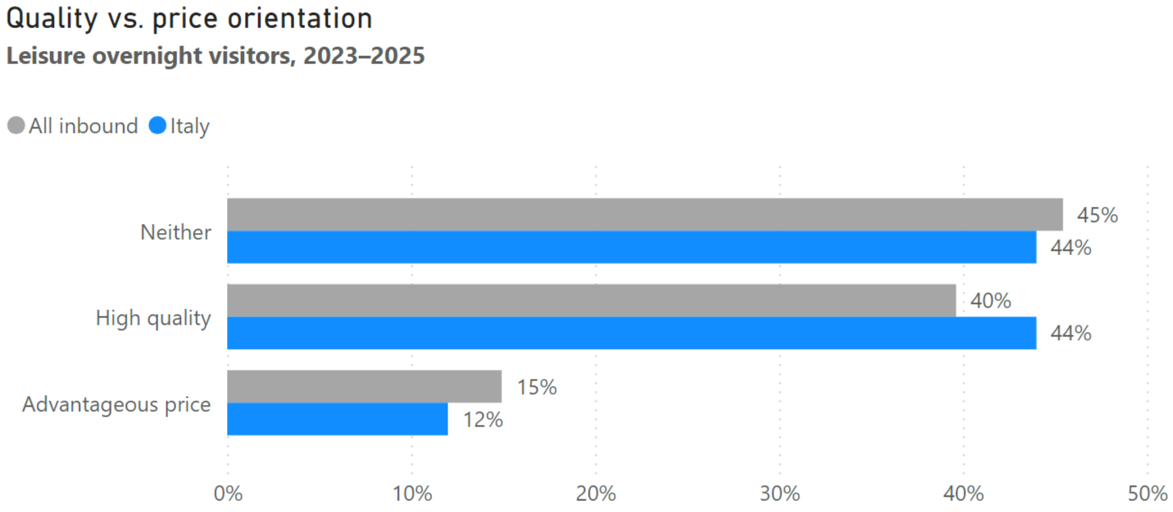
Low N for this question for segment(s): Italy (N=32)

Source: LFT/Ilres Visitor Survey.





Low N for this question for segment(s): Italy (N=25)

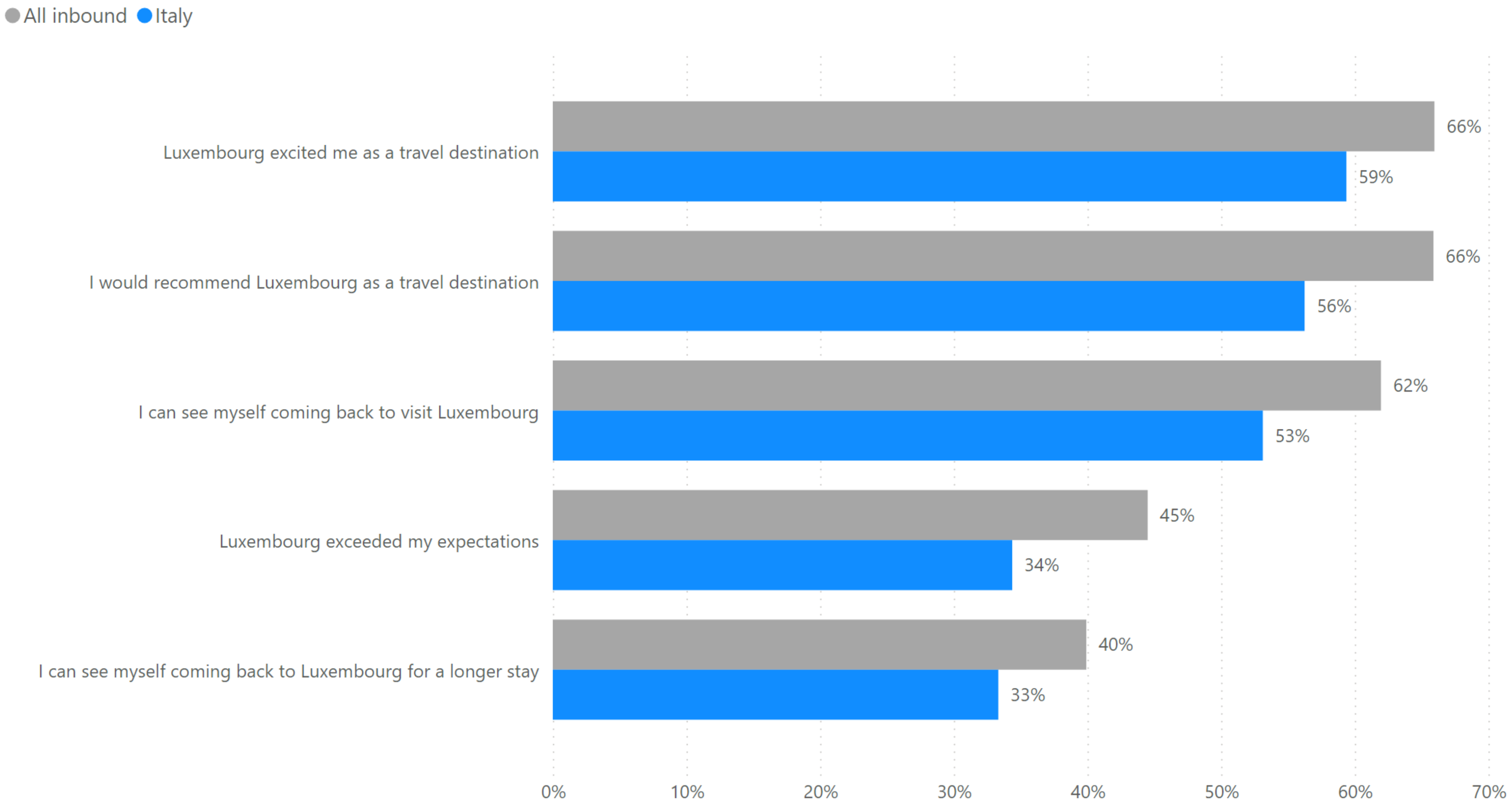


Low N for this question for segment(s): Italy (N=25)

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

Overall satisfaction - % "strongly agree"

Leisure overnight visitors, 2022–2025

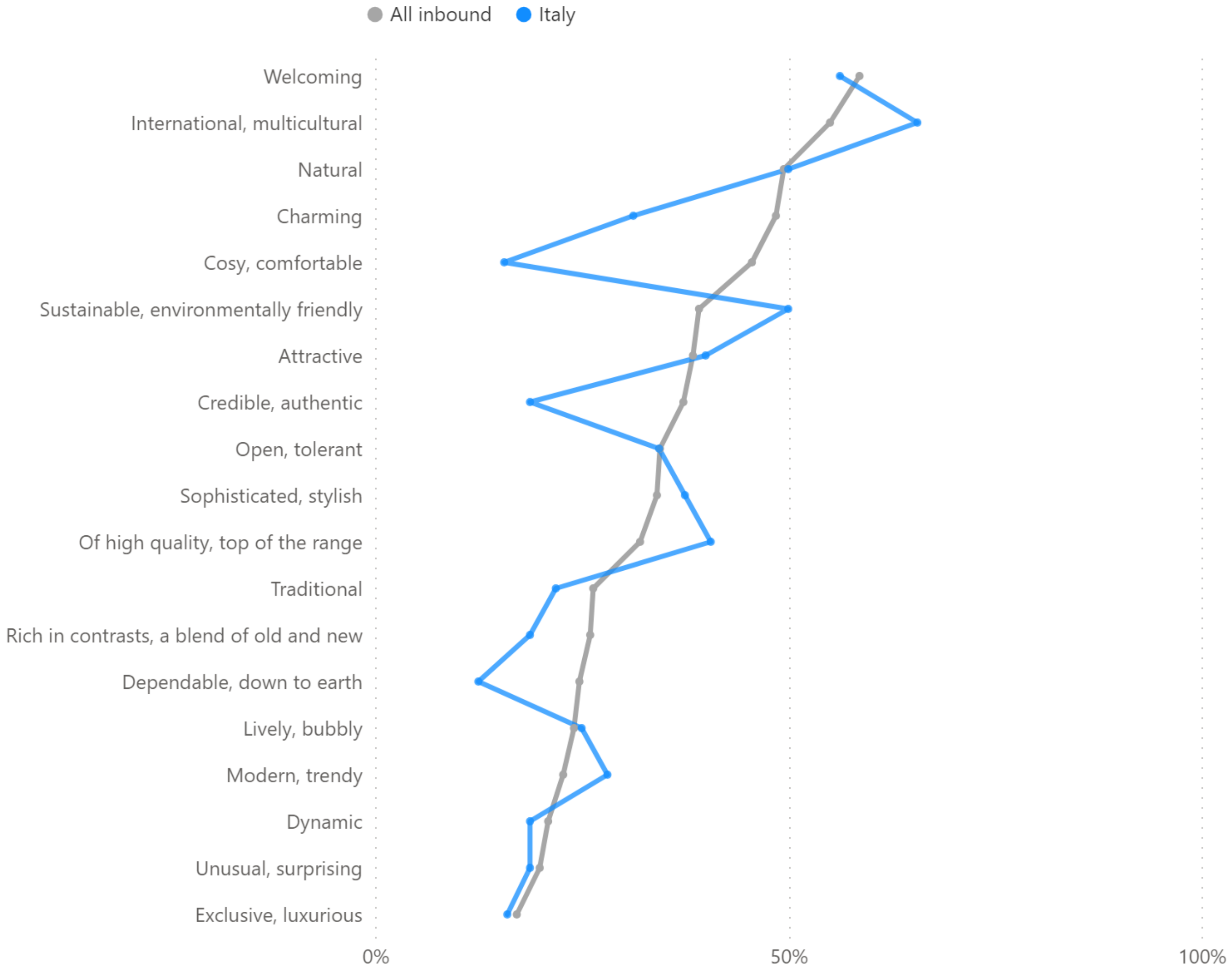


Low N for this question for segment(s): Italy (N=32)

Source: LFT/Ilres Visitor Survey.

Brand features

Leisure overnight visitors, 2022–2025

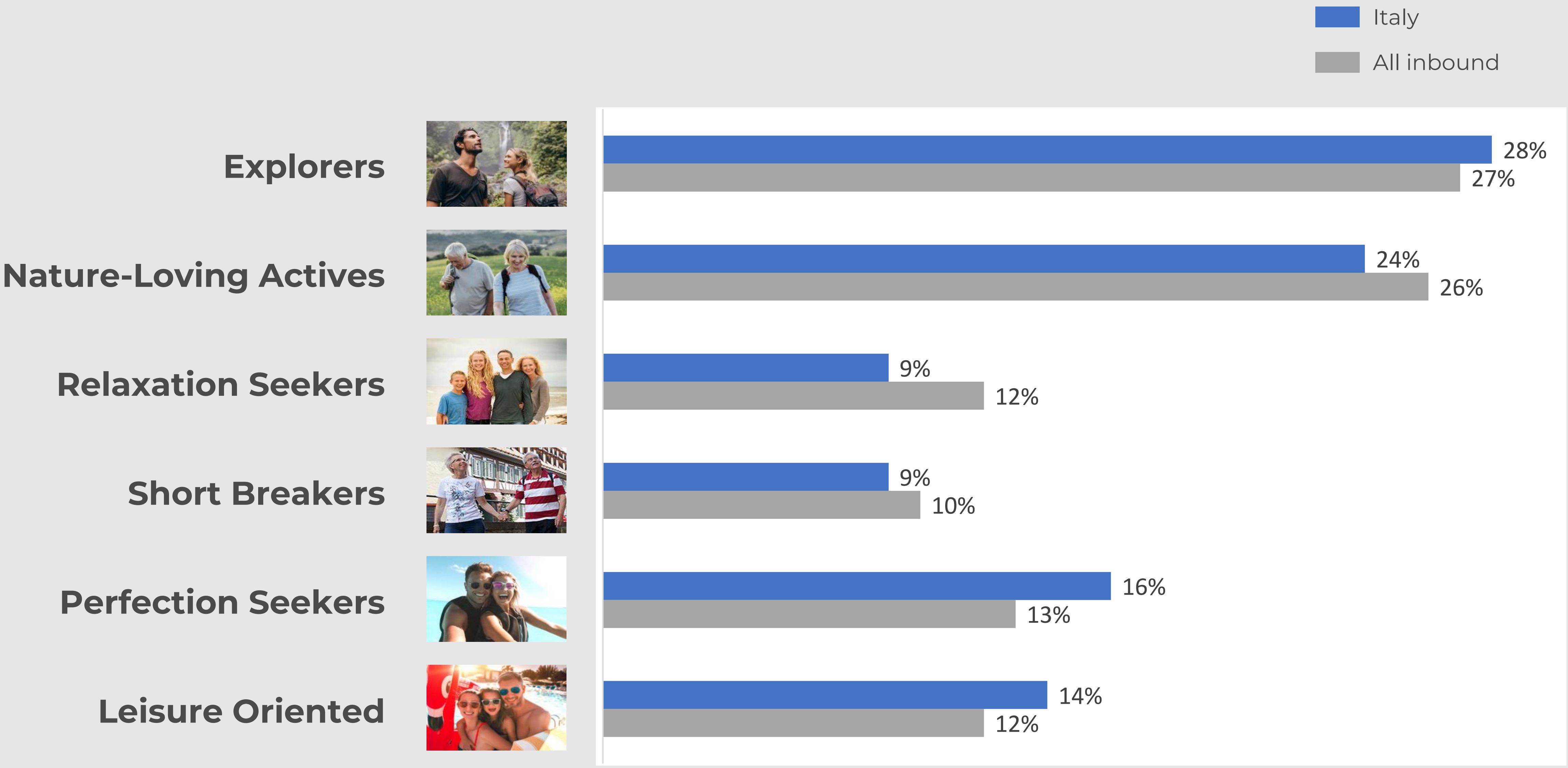


Low N for this question for segment(s): Italy (N=32)

Source: LFT/Ilres Visitor Survey.

Target segments,
Brand & Growth Potential

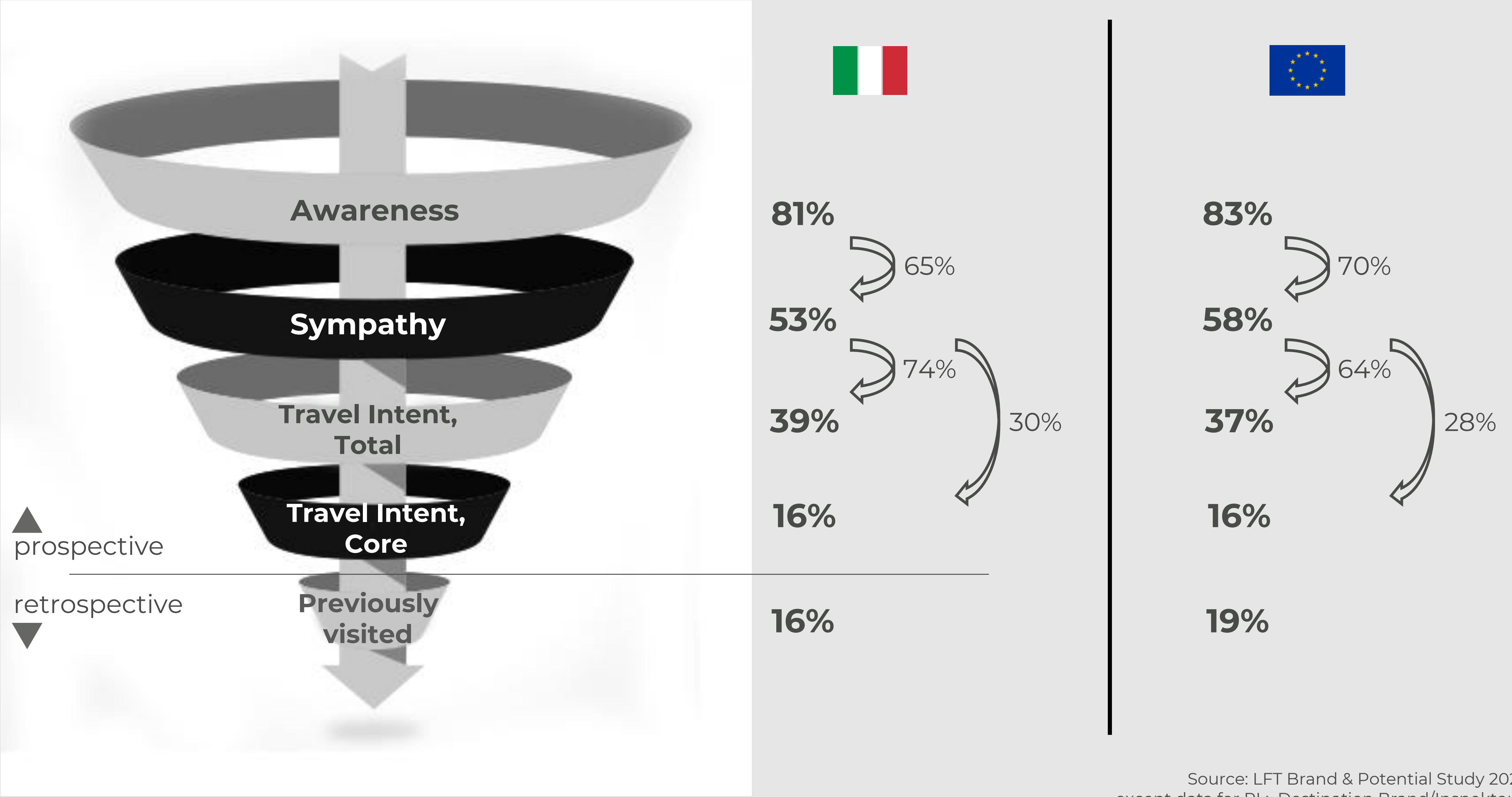
LFT Target Segments



Source: LFT (estimate).

Destination Luxembourg - Brand Funnel 2024

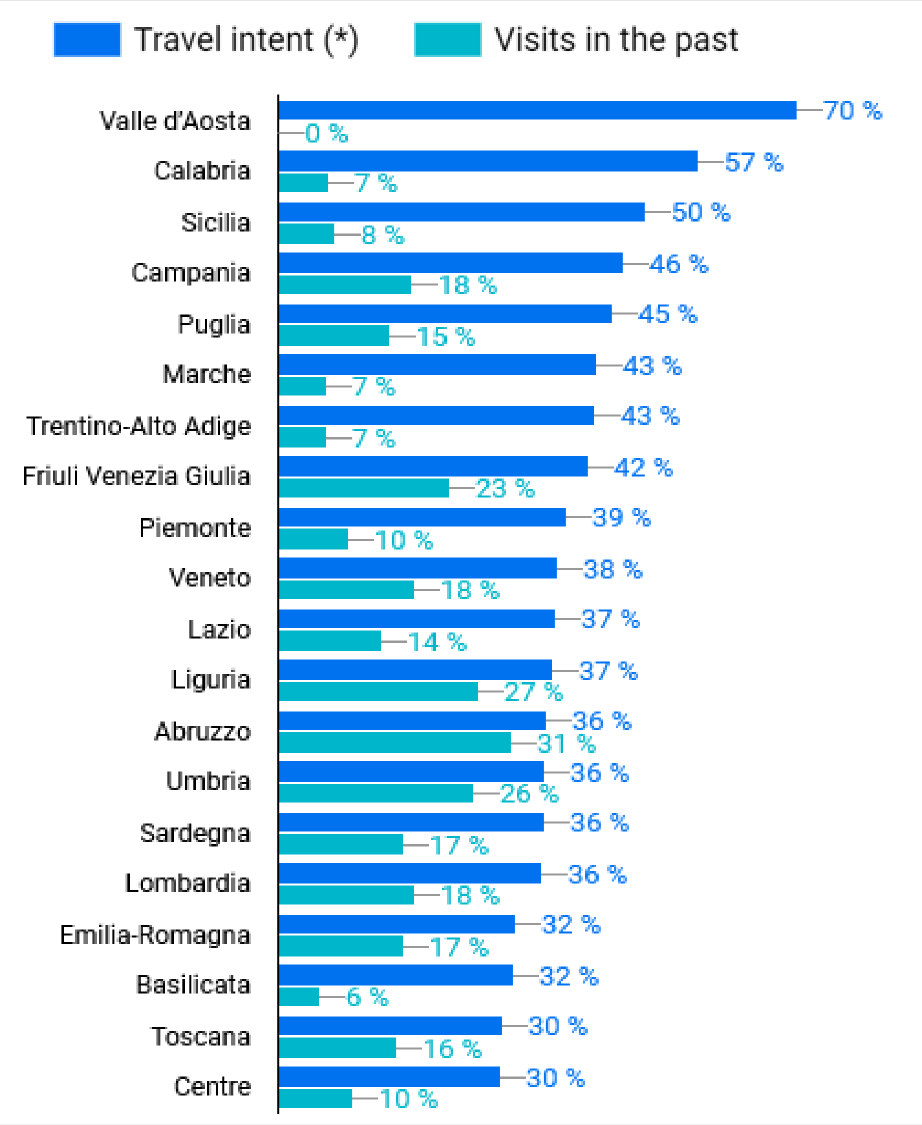
Assessing Luxembourg’s **brand strength** as a destination



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	Theme (continued)	Rank	**Rank**	% interested
Sightseeing	4	**1**	75%	**Fun/entertainment**	8	**20**	60%
Culinary	2	**2**	74%	**Events**	16	**21**	57%
Nature	3	**2**	74%	**Travelling by train**	18	**22**	57%
History/Unesco	10	**4**	74%	**Countryside**	22	**23**	54%
Immersive travel	6	**5**	73%	**Nightlife (**)**	20	**24**	54%
Architecture/townscapes	7	**6**	73%	**Wine**	21	**25**	52%
City	5	**7**	73%	**Adventure/action**	19	**26**	47%
Castles	9	**8**	72%	**Active-sports**	27	**27**	47%
Culture	11	**9**	71%	**Wellness**	25	**28**	47%
Learning/new skills	14	**10**	71%	**Shopping**	23	**29**	46%
Resting/Relaxation	1	**11**	70%	**Film locations**	30	**30**	45%
Gardens/parks		**12**	70%	**Remembrance**	26	**31**	43%
Hiking	17	**13**	67%	**Industrial heritage**	28	**32**	41%
Trad./folk festivals/mkts		**14**	67%	**Luxury**	24	**33**	35%
Road trips, scenic drives		**15**	65%	**Camping**	29	**34**	35%
Family	12	**16**	65%	**Water sports**		**35**	32%
Sustainability	15	**17**	63%	**MTB**	32	**36**	31%
Bathing (in lakes, waters)		**18**	61%	**Cycling**	31	**37**	27%
Exchanging with locals	13	**19**	61%	**Motorcycling**	33	**38**	24%

(*) 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).

Note: Some themes are only surveyed for Italy and Spain (n= 38) and thus have no ranking for Europe (n= 33).

Source: LFT Brand & Potential Study, 2024.

Luxembourg's Theme Competence (*)

Theme	Europe	Italy	Italy
	Rank	**Rank**	% agreeing
Castles	7	**1**	41%
City	1	**2**	37%
Culture	6	**3**	36%
Nature	5	**4**	34%
Gardens, parks		**5**	34%
Architecture/townscapes	4	**6**	32%
Resting/Relaxation	2	**7**	32%
Culinary	3	**8**	29%
Family	8	**9**	29%
Hiking	11	**10**	28%
History/Unesco	12	**11**	27%
Luxury	9	**12**	27%
Road trips, scenic drives		**13**	26%
Events, cultural		**14**	25%
Fun/entertainment	13	**15**	22%
Shopping	10	**16**	22%
Nightlife (**)	14	**17**	21%
Sustainability	18	**18**	21%
Wellness	16	**19**	20%
Countryside	17	**20**	20%
Wine	15	**21**	20%
Remembrance	26	**22**	16%
Action, adventure	22	**23**	16%
Industrial heritage	24	**24**	16%
Camping	19	**25**	15%
Active-sports	21	**26**	15%
Bathing in lakes, waters		**27**	14%
MTB	25	**28**	13%
Events, sport		**29**	12%
Cycling	20	**30**	12%
Water sports		**31**	9%

(*) 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)

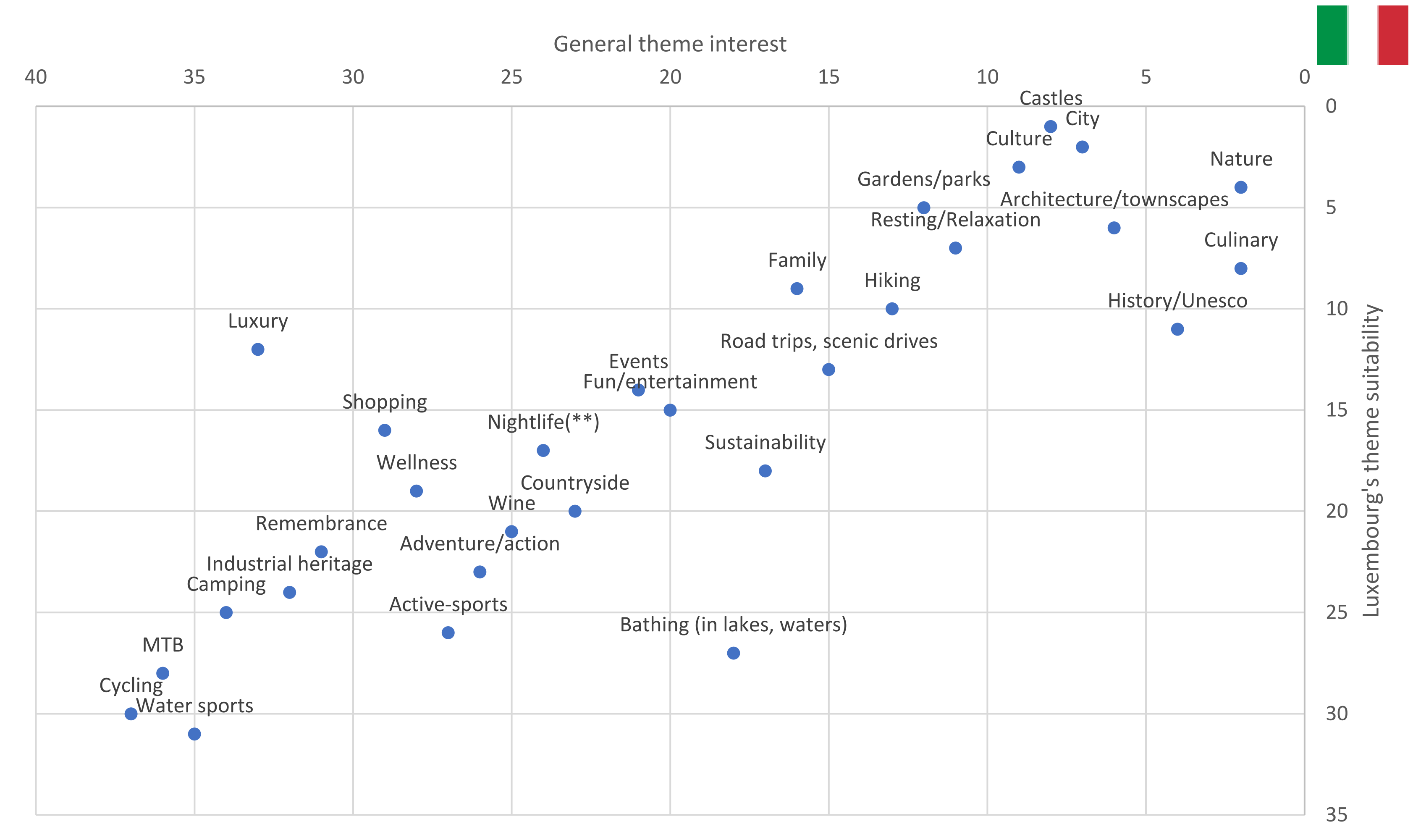
Note: Some themes are only surveyed for Italy and Spain (n= 31) and thus have no ranking for Europe (n= 26).

.

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
clean	2	**1**	46%
safe	1	**2**	42%
of high quality	3	**3**	37%
open-minded, tolerant, international	6	**4**	33%
welcoming, hospitable	4	**5**	33%
exclusive, luxurious	8	**6**	31%
authentic, real	5	**7**	30%
dynamic, modern	9	**8**	28%
sustainable	15	**9**	27%
service oriented	10	**10**	27%
attractive, appealing	7	**11**	26%
unique		**12**	26%
not overcrowded / insider tip	14	**13**	25%
surprising	11	**14**	25%
varied, diversified	12	**15**	25%
lively, trendy	13	**16**	20%
affordable	16	**17**	19%

(*) 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.

The brand value „unique" is only surveyed for Italy and Spain and thus has no average for Europe

Source: LFT Brand & Potential Study, 2024.

Spontaneous associations with Luxembourg

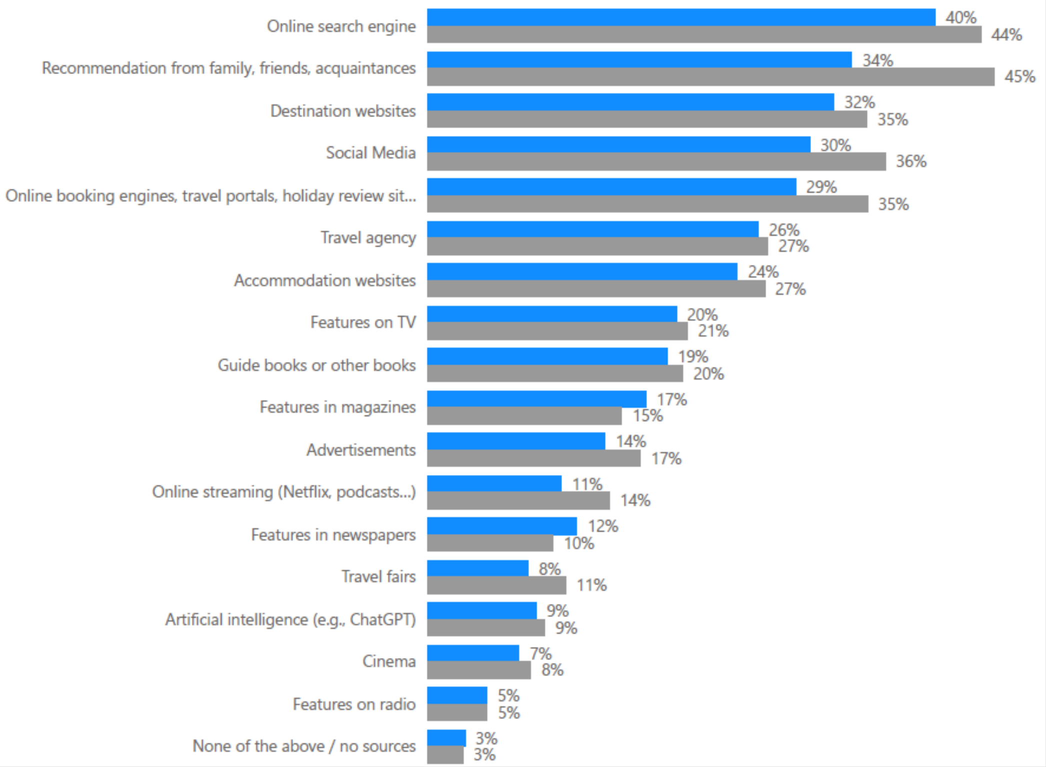
Trip organisation and preferences (1)

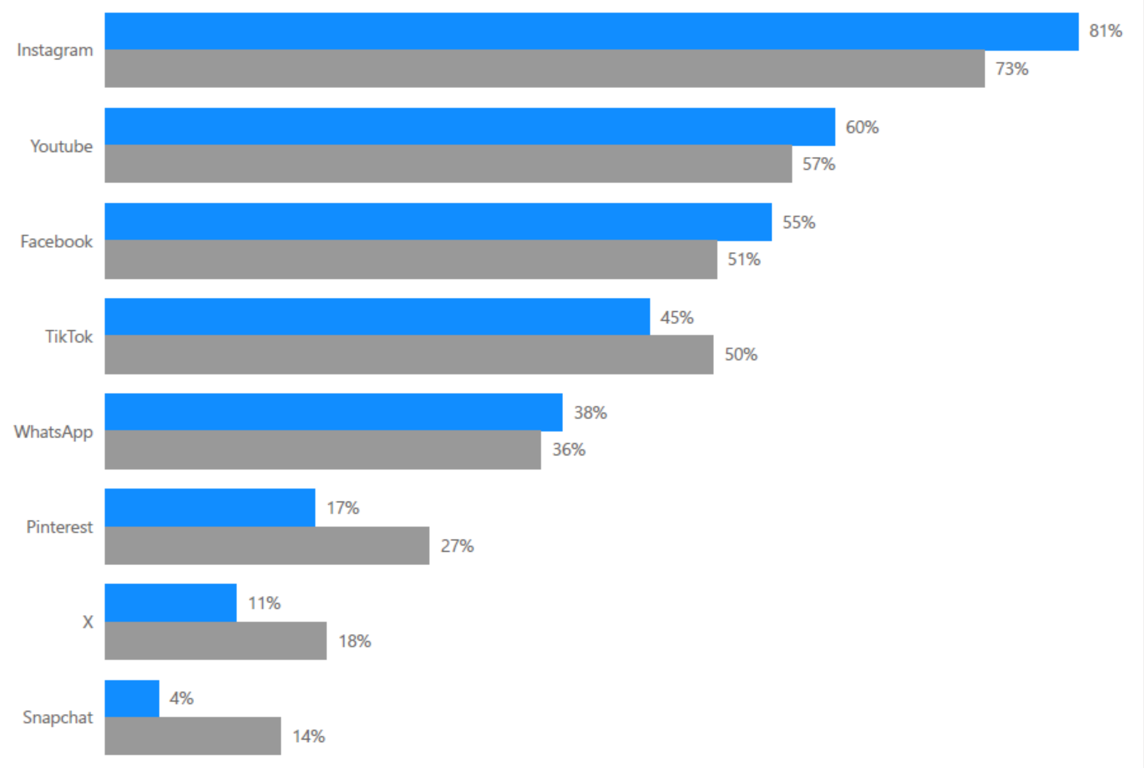
— Average **European source markets**, total vs. Italy

Italy

All inbound

Preferred sources of travel inspiration





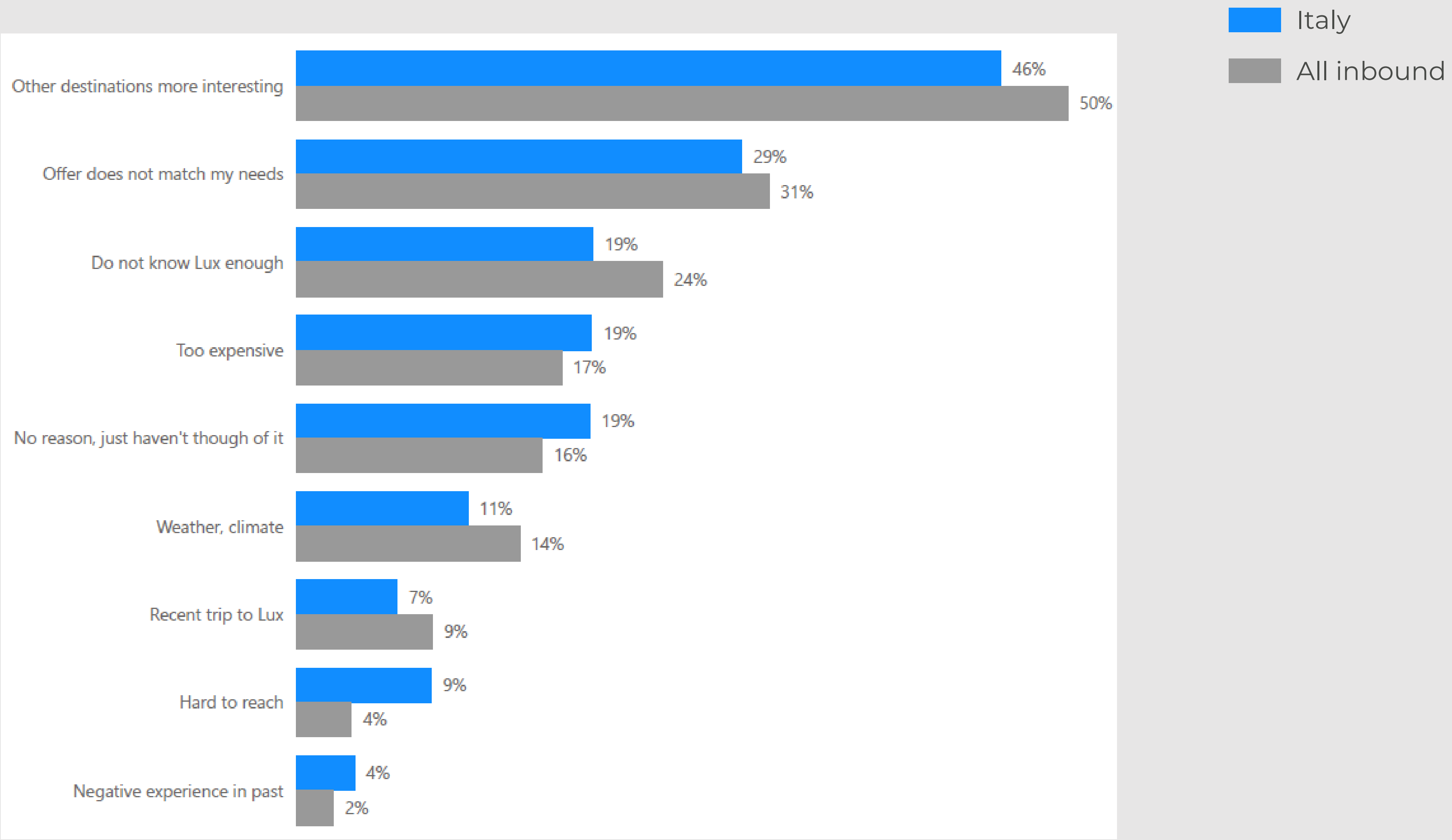
Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent to Luxembourg)

Source: LFT Brand & Potential Study, 2024.

Trip organisation and preferences (2)

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

Reasons for not considering Luxembourg as a destination

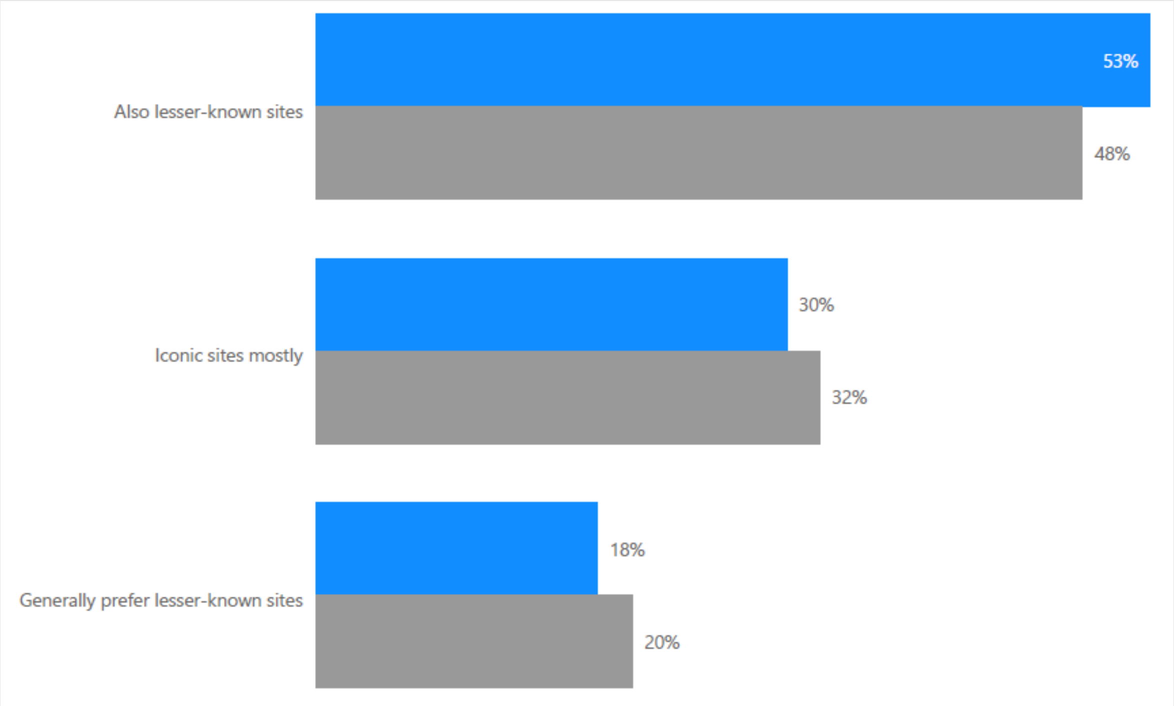


Source: LFT Brand & Potential Study, 2024.

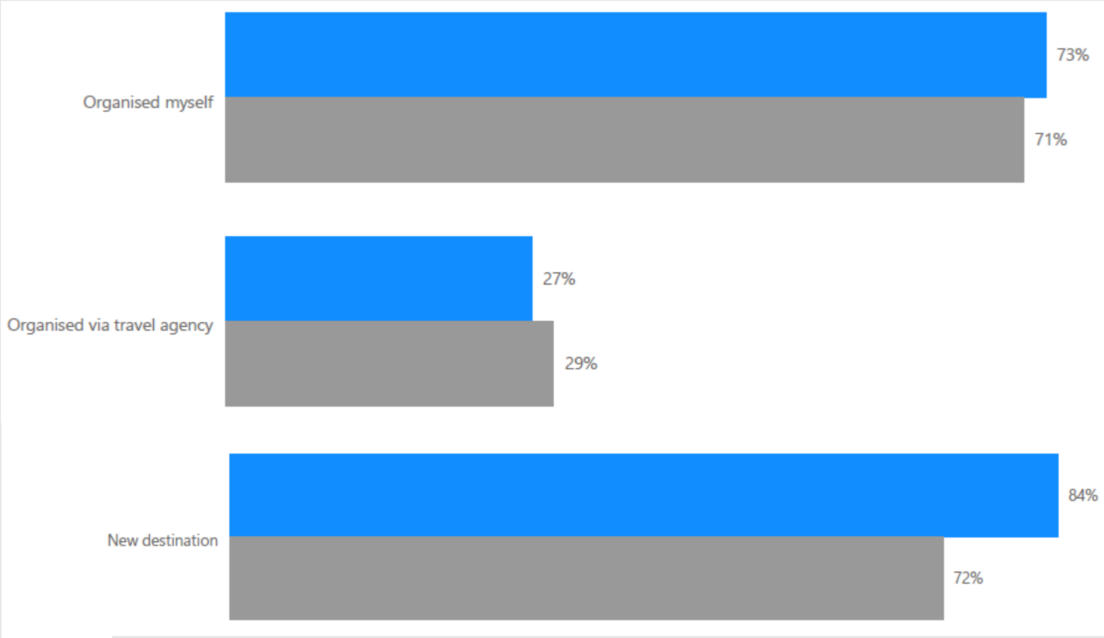
Trip organisation and preference (3)

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

General preference for visiting iconic vs. lesser-known sites



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



Italy

All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.

Your contact

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