



Luxembourg for Tourism

Market profile

NETHERLANDS

2025

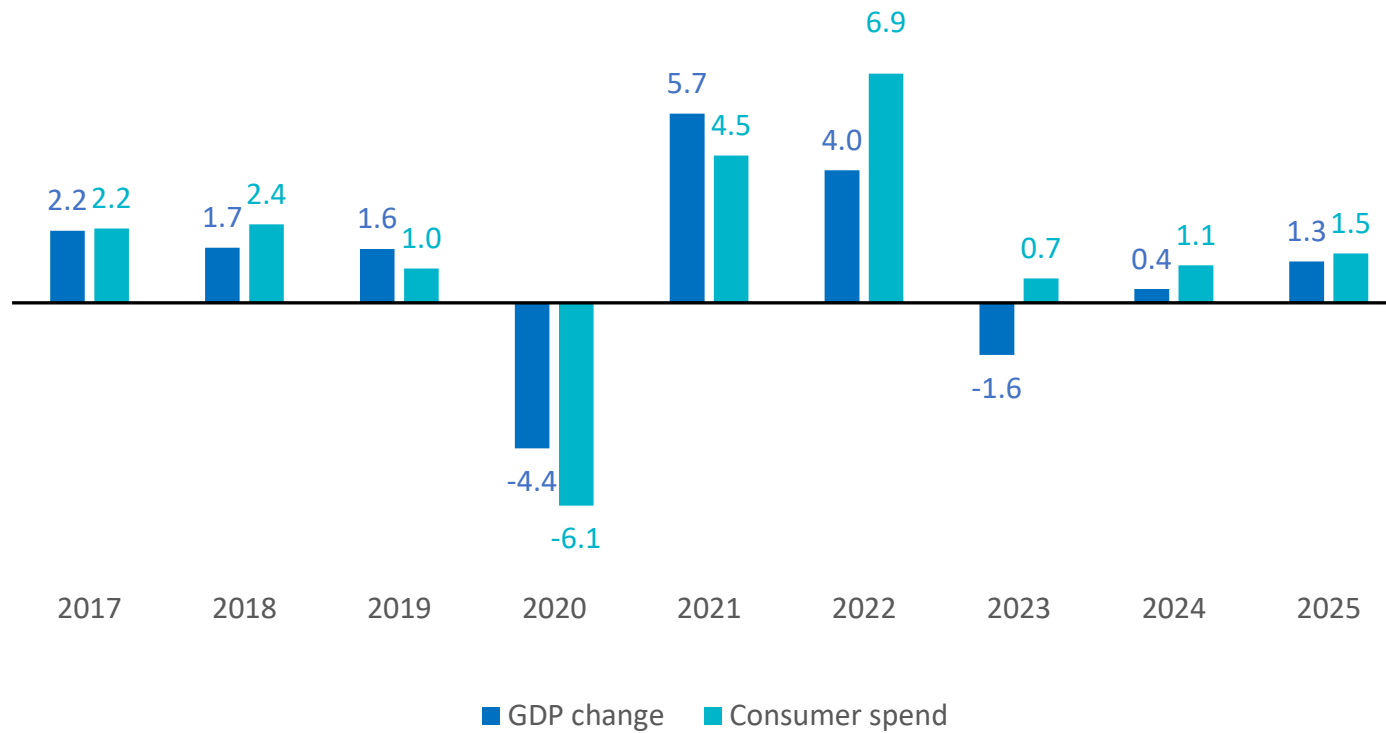


Economic indicators & General Travel Demand

Economic indicators – General travel demand



GDP and consumer spending, % annual change



Economy & population

GDP (PPP, \$) per capita
71,378

Unemployment (%)
3.9

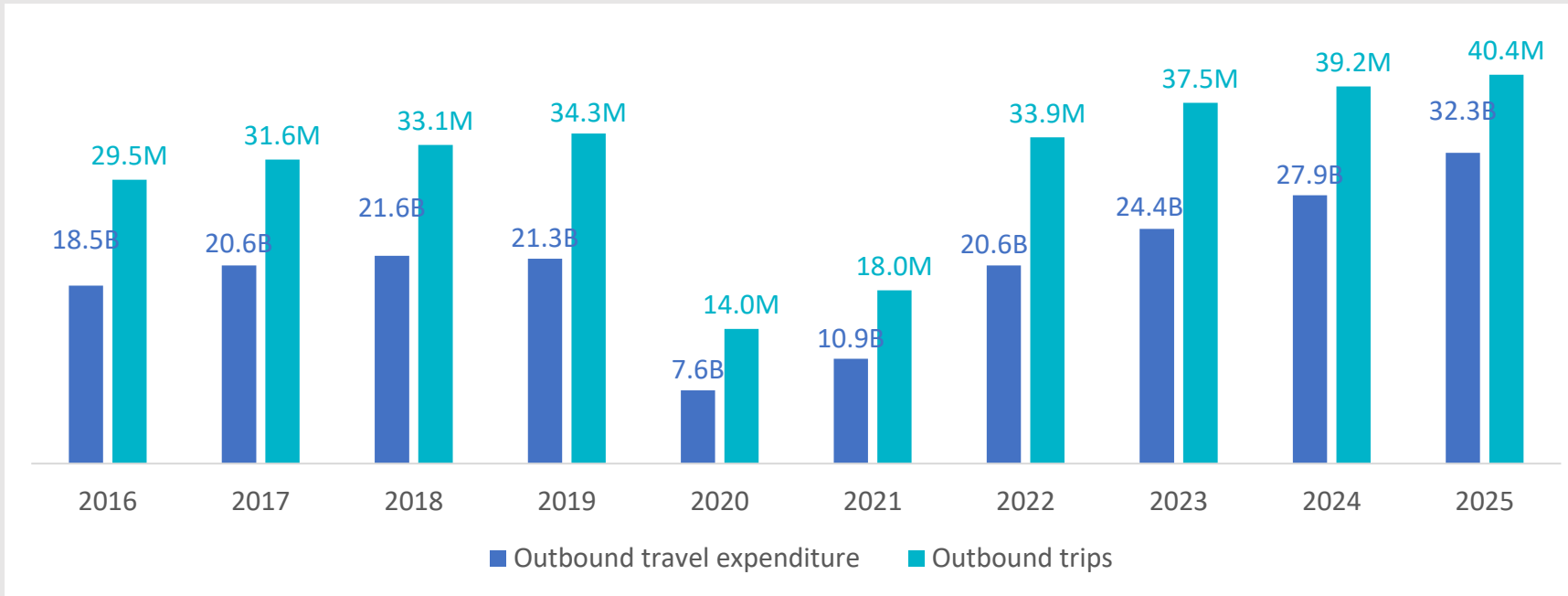
Inflation(%)
3.2

Population
18,346,819

Economic indicators – General travel demand



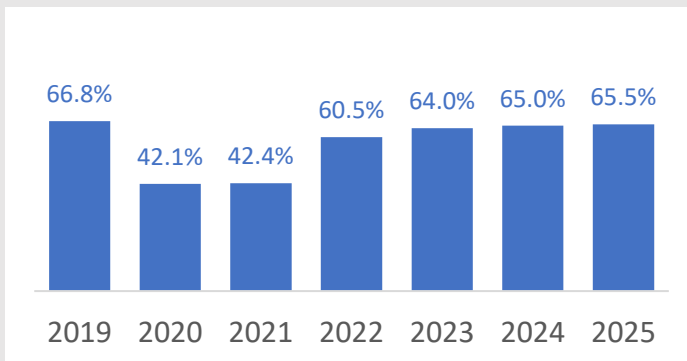
Outbound trips and travel expenditure



Outbound travel intensity
2.20 trips
per inhabitant (2025)

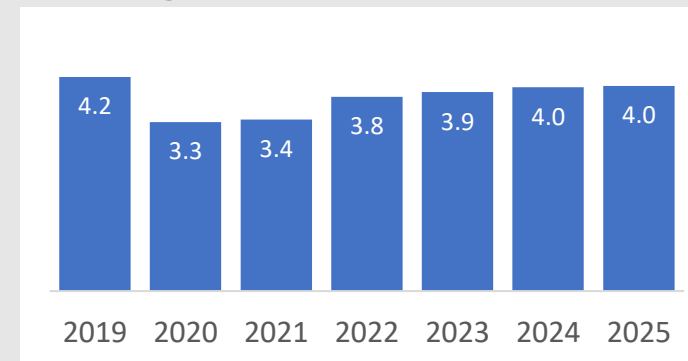
Average spend
per outbound trip (2025)
797 \$

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

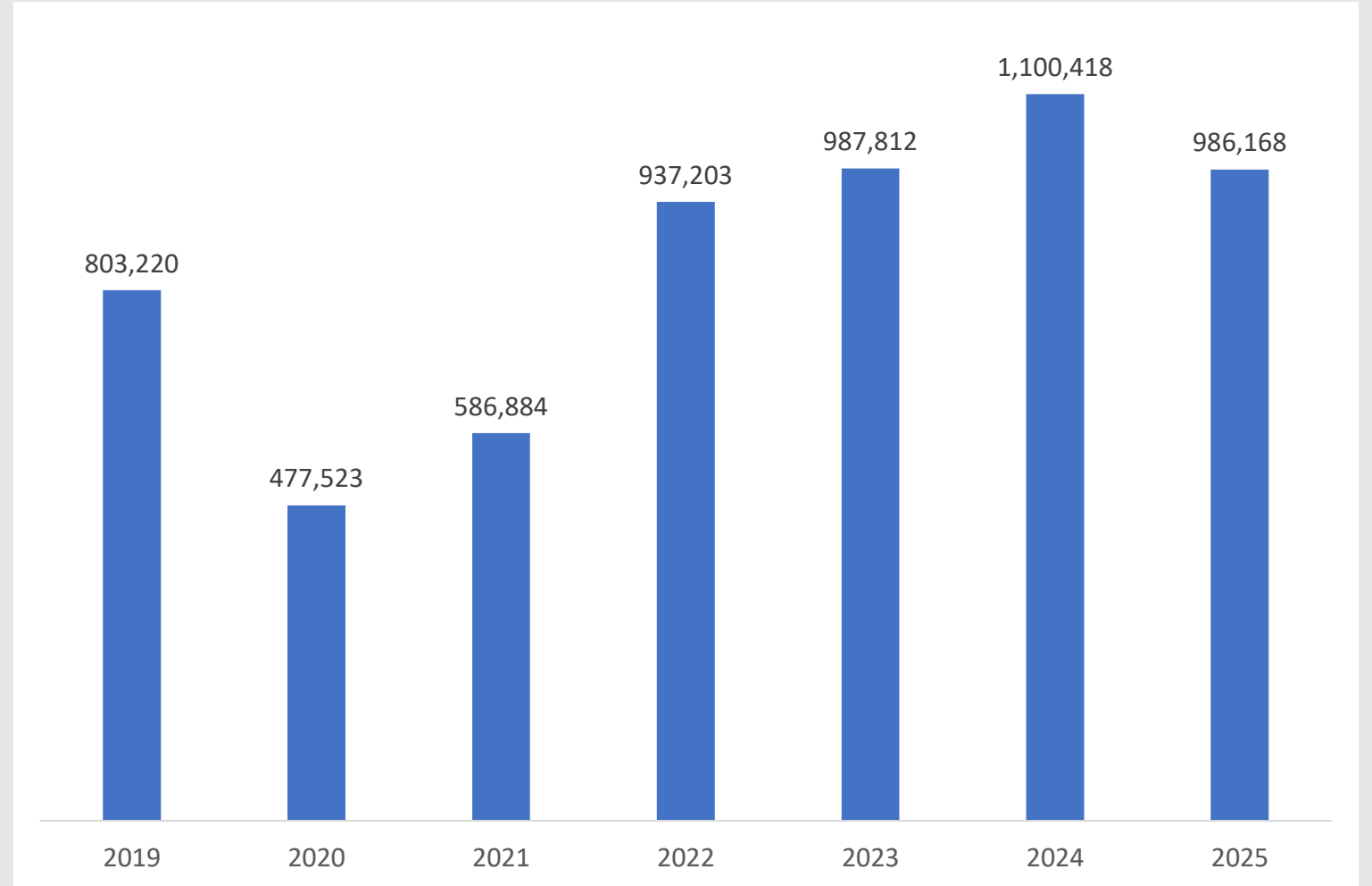


Nights,
paid accommodation, 2025



-10% (vs. 2024)

+23% (vs. 2019)

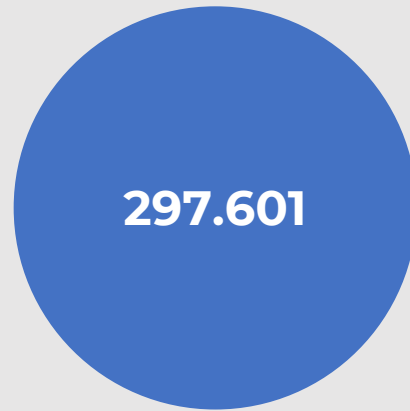


Arrivals in paid accommodation

2025 and 2019-2025

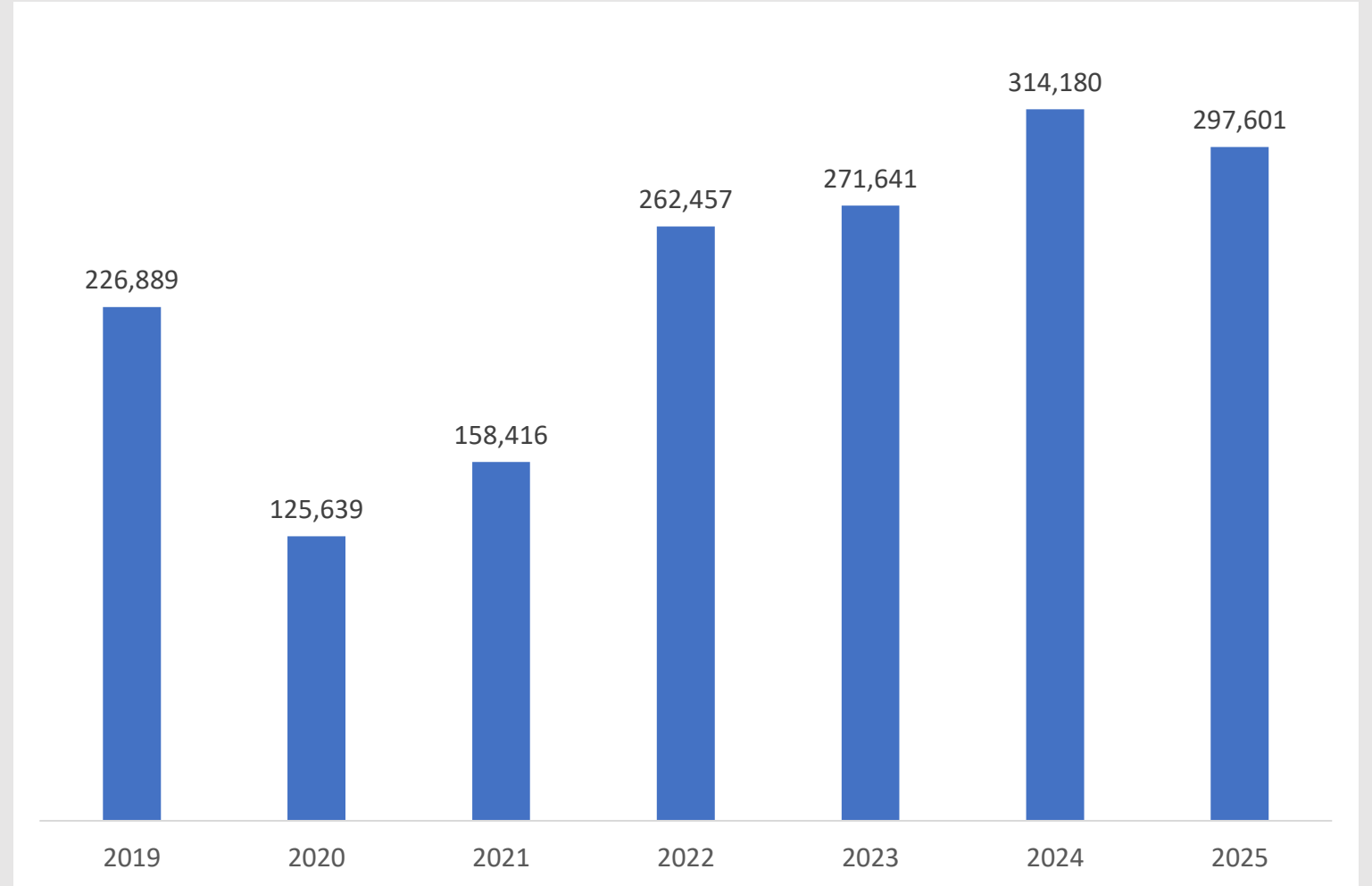


Arrivals,
paid accommodation, 2025



-5% (vs. 2024)

+31% (vs. 2019)



Length of stay, paid accommodation

2025 and 2019-2025

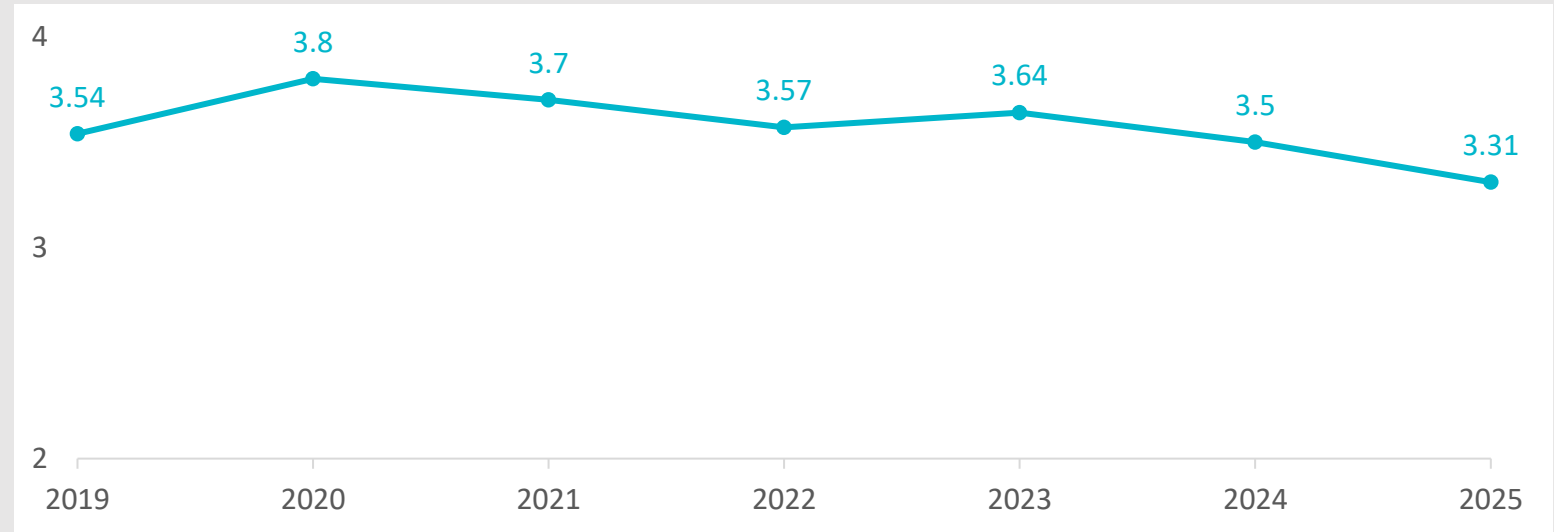


Average length of stay,
paid accommodation, 2025



-0.19 nights (vs. 2024)

-0.23 nights (vs. 2019)

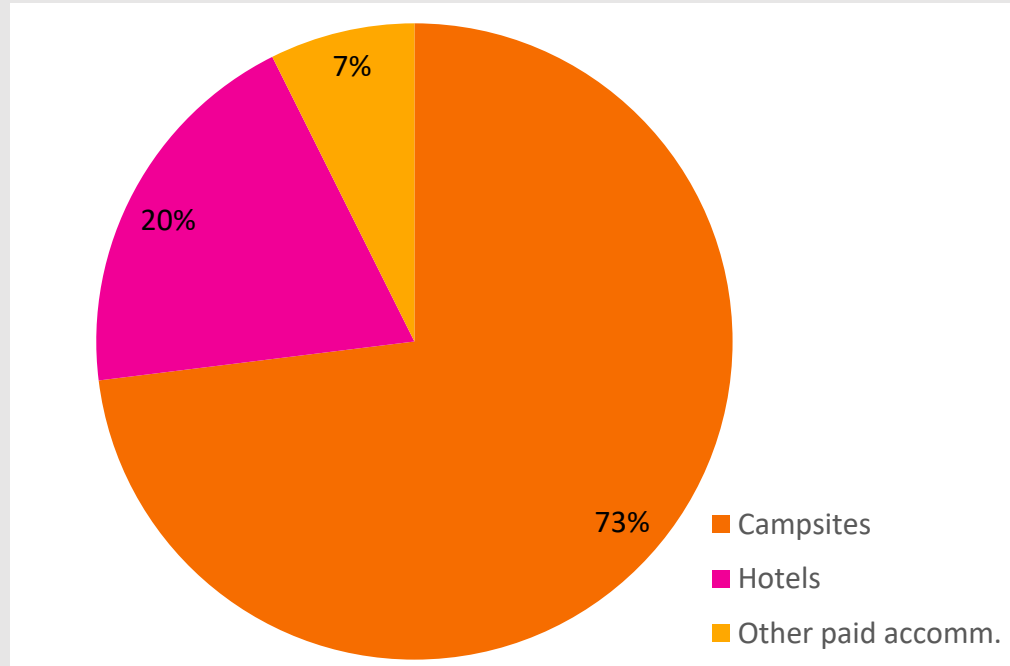


Nights & arrivals in paid accommodation

Type of accommodation, 2025

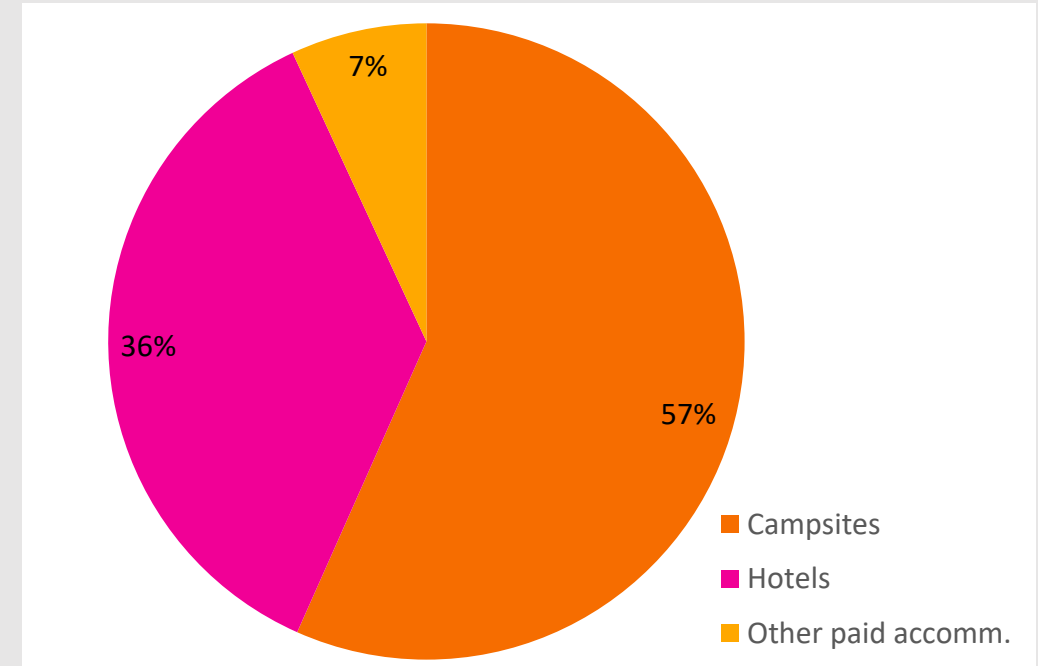


**Nights,
paid accommodation, 2025**



Campsites	720.344	-14% (vs. 2024)	+23% (vs. 2019)
Hotels	193.130	-2% (vs. 2024)	+31% (vs. 2019)
Other paid accomm.	72.694	+7% (vs. 2024)	+2% (vs. 2019)

**Arrivals,
paid accommodation, 2025**



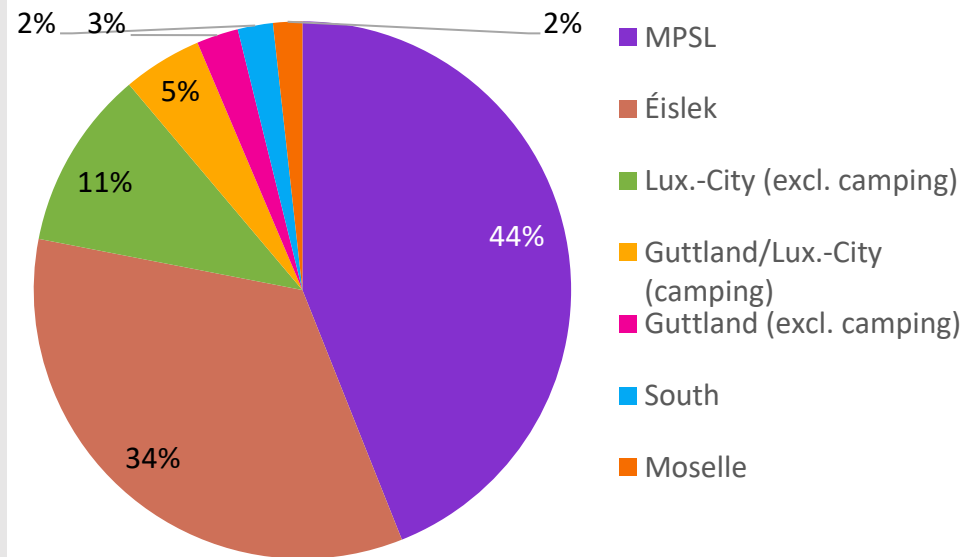
Campsites	168.615	-7% (vs. 2024)	+33% (vs. 2019)
Hotels	108.423	-5% (vs. 2024)	+29% (vs. 2019)
Other paid accomm.	20.563	+6% (vs. 2024)	+33% (vs. 2019)

Nights & arrivals in paid accommodation

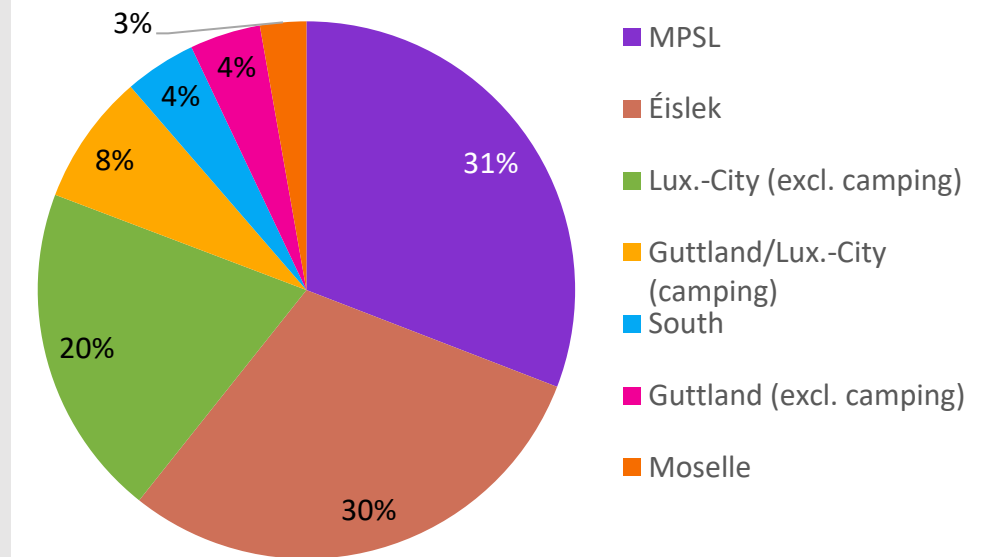
Regions, 2025



Nights, paid accommodation, 2025



Arrivals, paid accommodation, 2025



MPSL	433.549	-15% (vs. 2024)	+40% (vs. 2019)
Éislek	336.169	-11% (vs. 2024)	+4% (vs. 2019)
Lux.-City (excl. camping)	106.437	+8% (vs. 2024)	+59% (vs. 2019)
Guttland/Lux.-City (camping)	47.012	-6% (vs. 2024)	-16% (vs. 2019)
Guttland (excl. camping)	24.801	+13% (vs. 2024)	+20% (vs. 2019)
South	20.909	-17% (vs. 2024)	+30% (vs. 2019)
Moselle	17.291	+6% (vs. 2024)	+53% (vs. 2019)

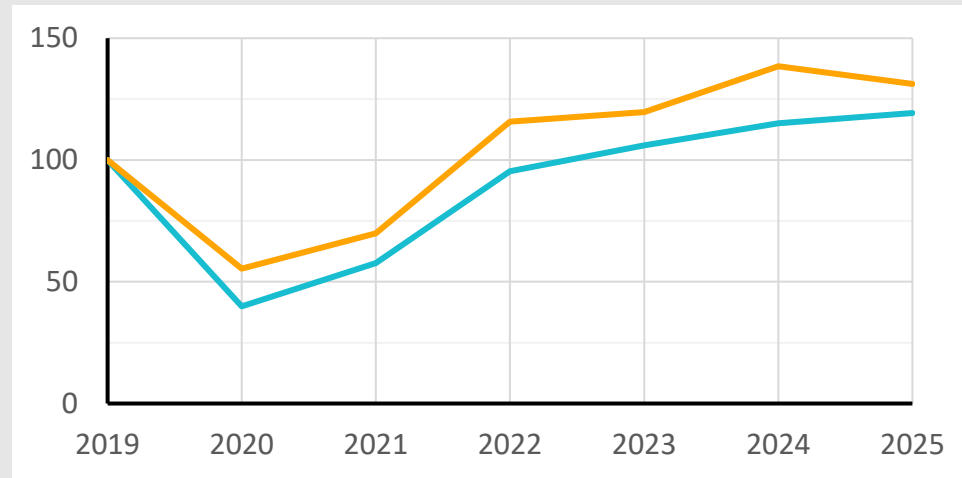
MPSL	91.854	-4% (vs. 2024)	+54% (vs. 2019)
Éislek	88.769	-10% (vs. 2024)	+24% (vs. 2019)
Lux.-City (excl. camping)	59.740	+3% (vs. 2024)	+57% (vs. 2019)
Guttland/Lux.-City (camping)	23.468	-13% (vs. 2024)	-20% (vs. 2019)
South	12.817	-16% (vs. 2024)	+15% (vs. 2019)
Guttland (excl. camping)	12.684	+1% (vs. 2024)	+14% (vs. 2019)
Moselle	8.269	+7% (vs. 2024)	+42% (vs. 2019)

Arrivals in paid accommodation

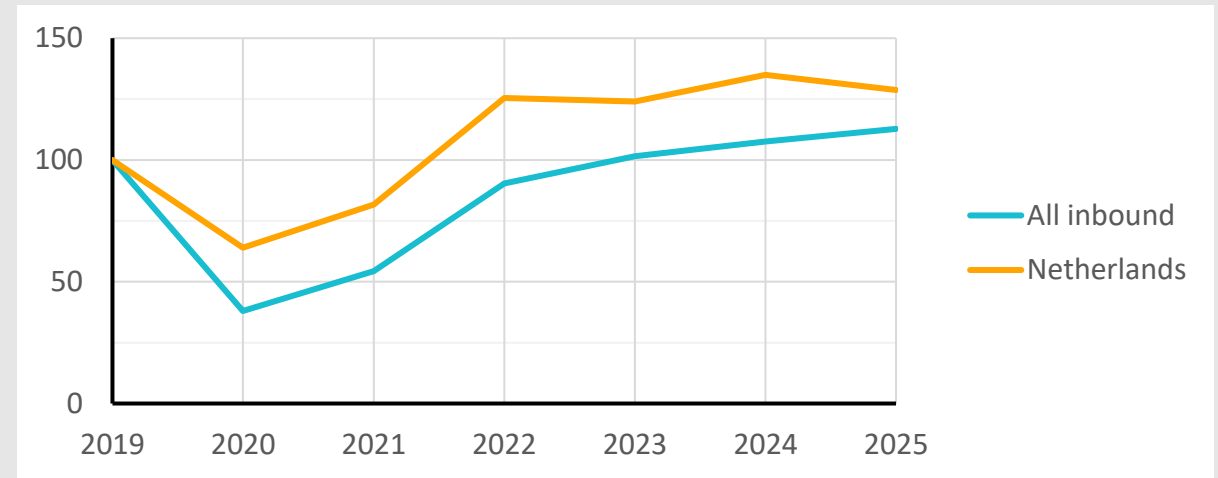
Trends 2019-2025



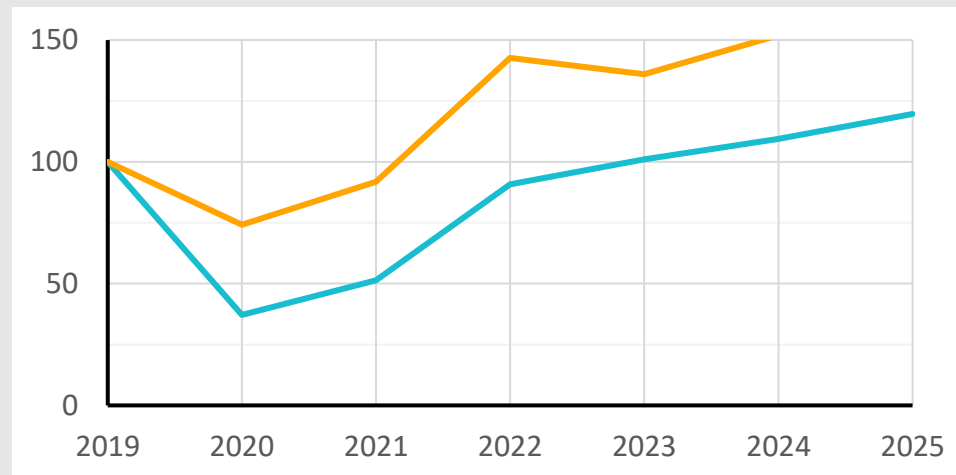
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

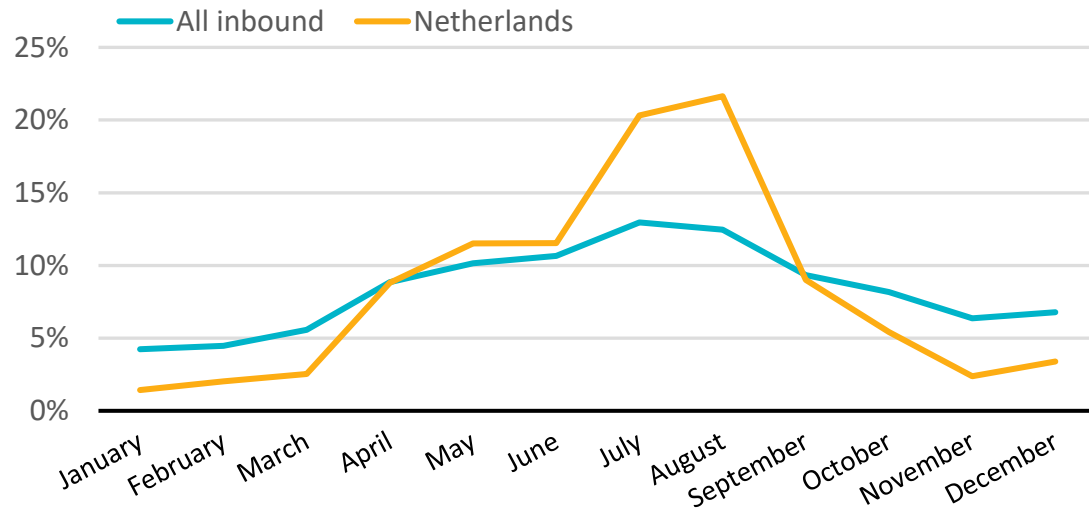


Arrivals in paid accommodation

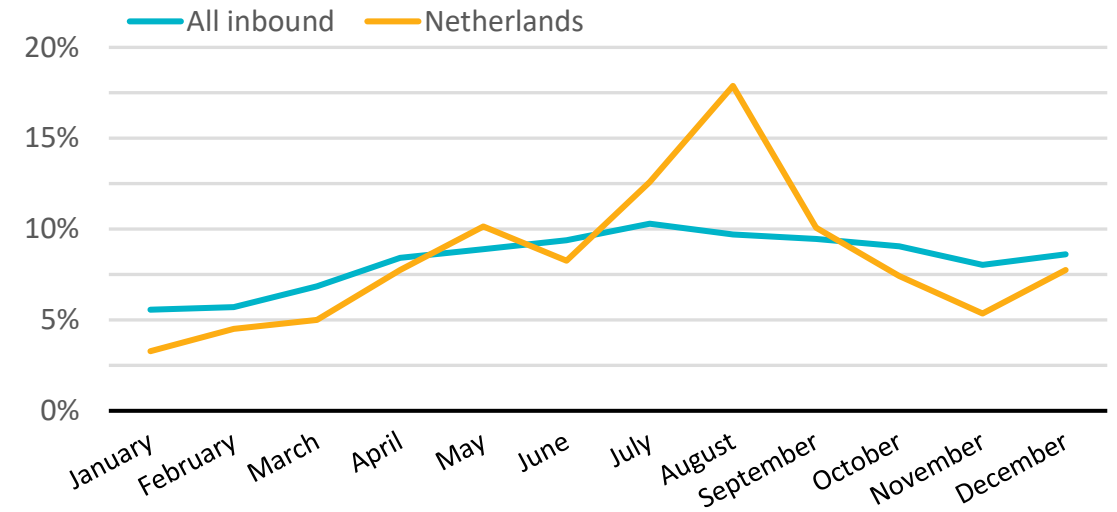
Seasonality



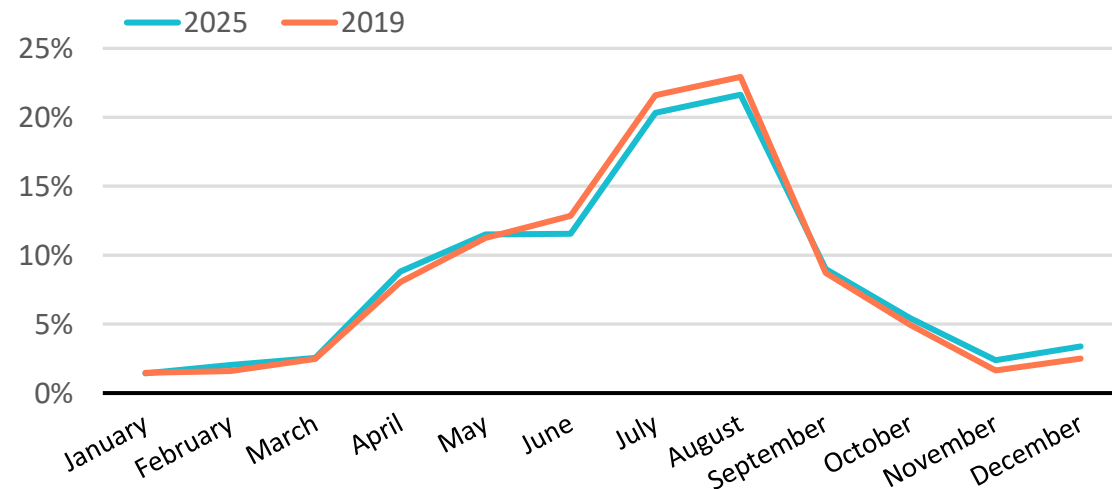
All paid accommodation, 2025



Hotels, 2025



All paid accommodation, arrivals from the Netherlands



Short-term rentals

2025 and 2019-2025



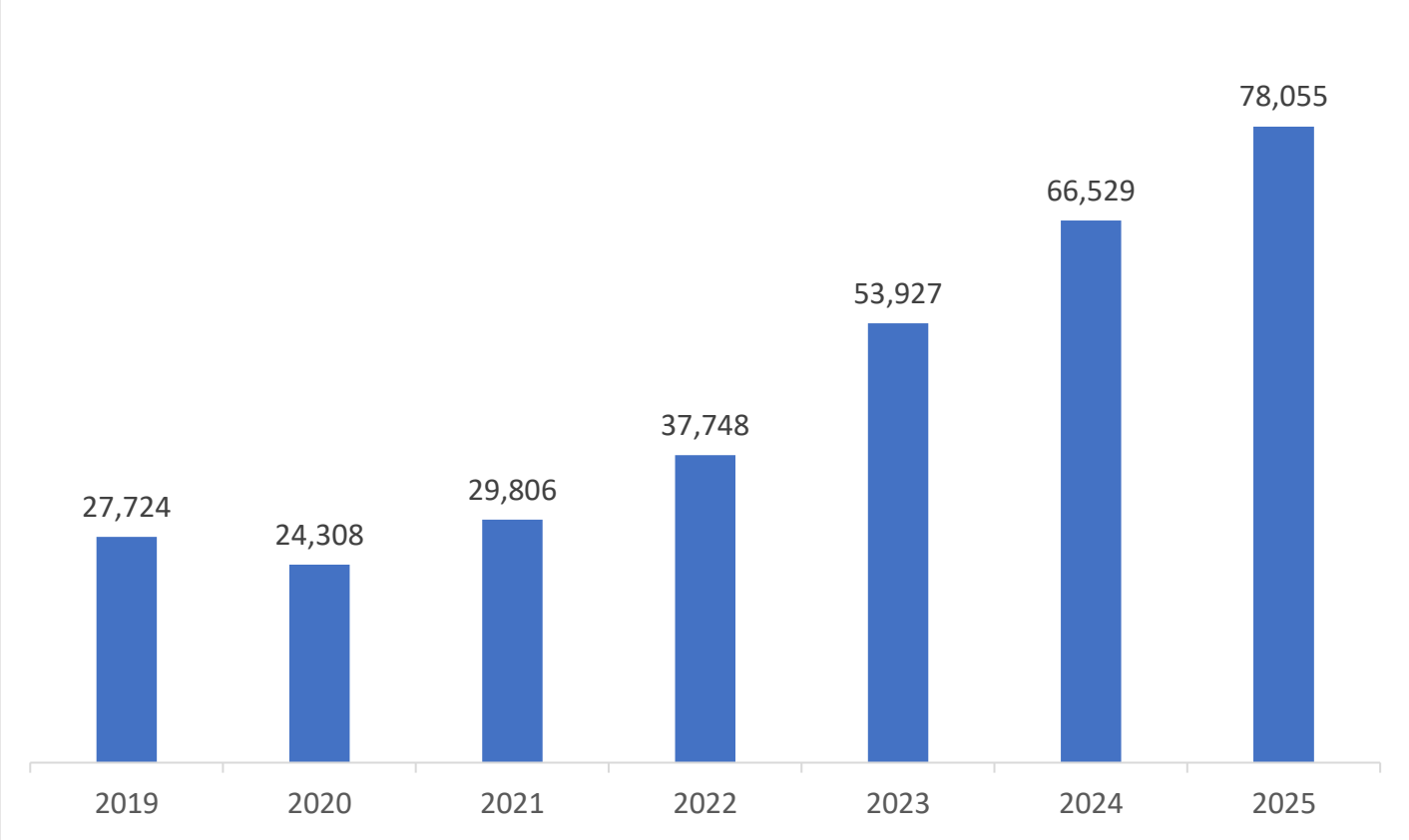
Nights,
Short-term rentals, 2025



+17% (vs. 2024)

+182% (vs. 2019)

Nights,
Short-term rentals, 2019-2025





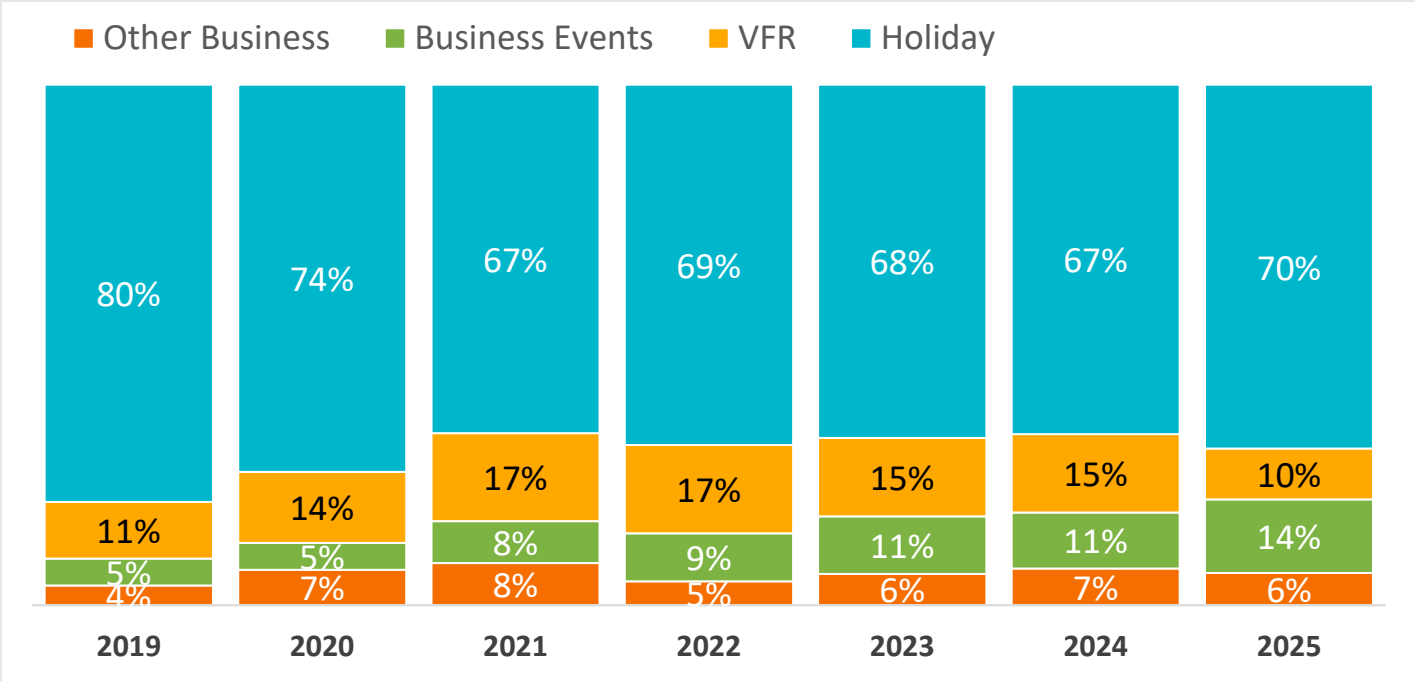
Characteristics of inbound trips

Dutch trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2019-2025

Dutch trips to Luxembourg, 2019-2025



2025
Netherlands to Europe to
Luxembourg

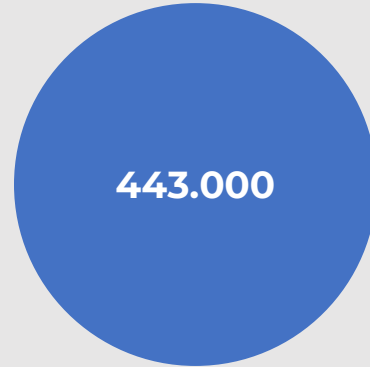
Holiday	70%	62%
VFR	10%	12%
Business Events	14%	17%
Other Business	6%	8%

Inbound same-day trips to Luxembourg

2025



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



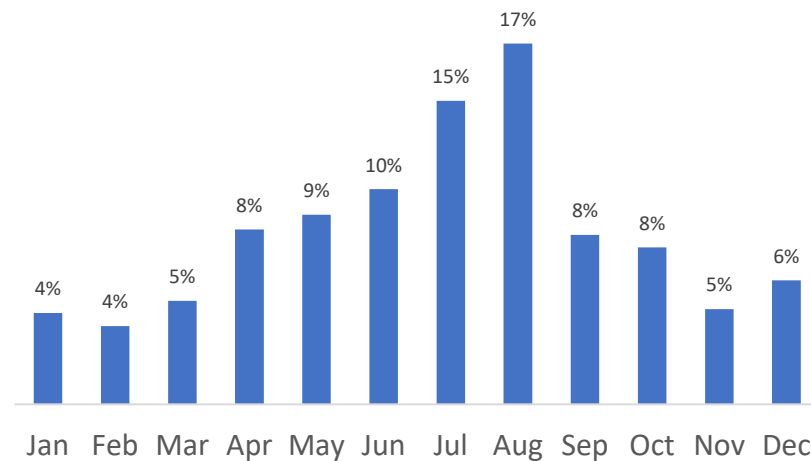
-8% (vs. 2024)

**Average length
of same-day trips**



+0,7 h (vs. 2024)

**Seasonality
% of same-day trips**

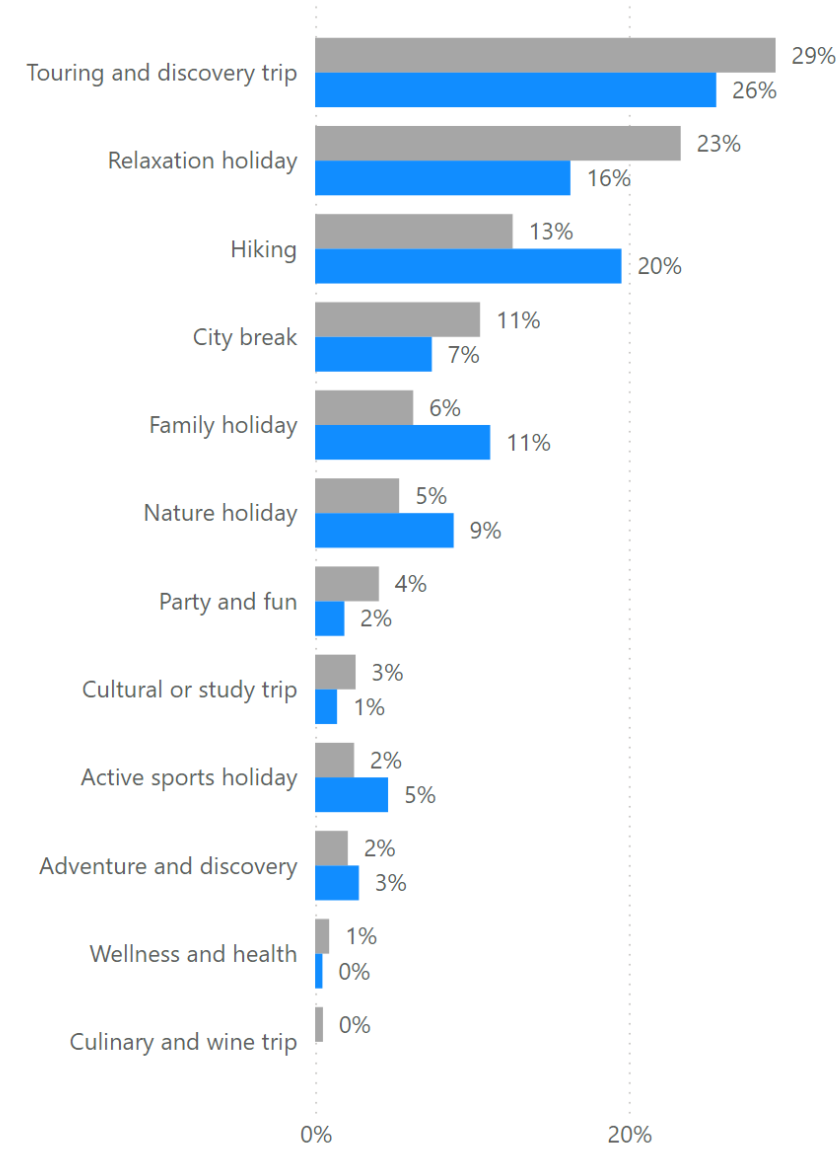




Travel behaviour of inbound leisure visitors

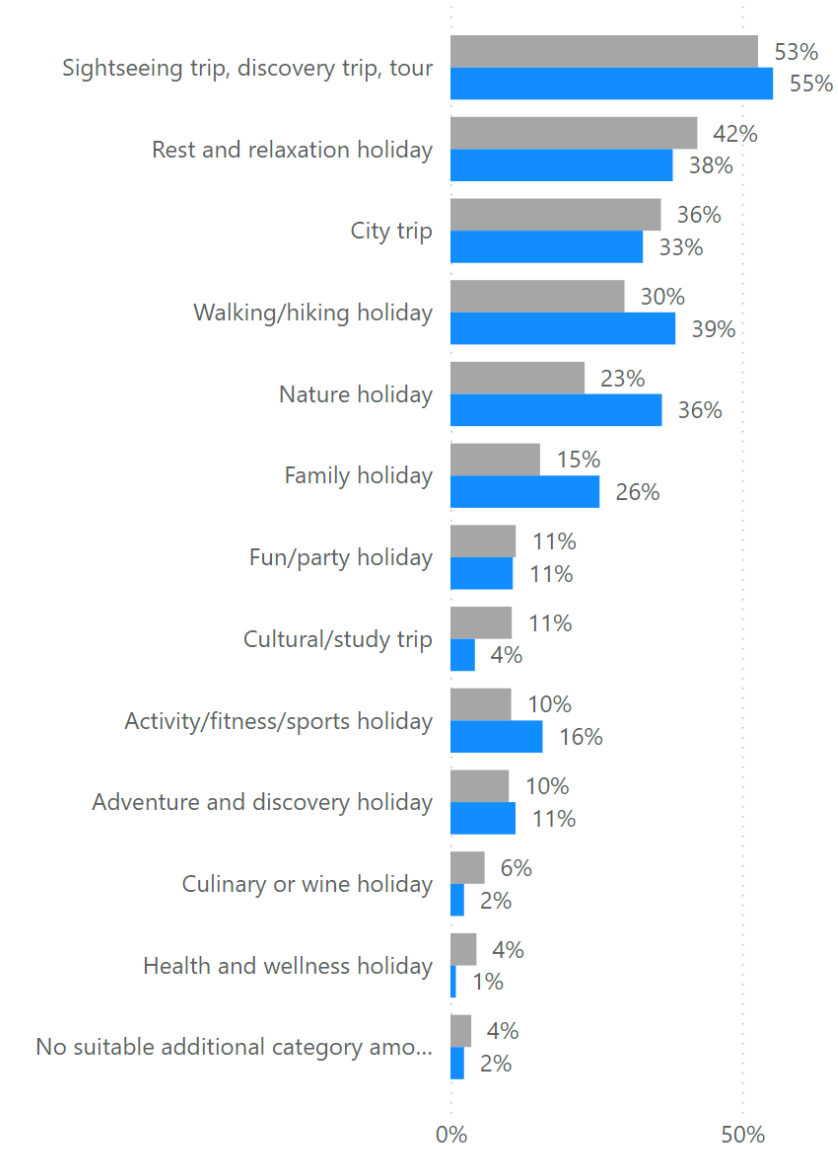
Main holiday types
Leisure overnight visitors, 2025

All inbound Netherlands



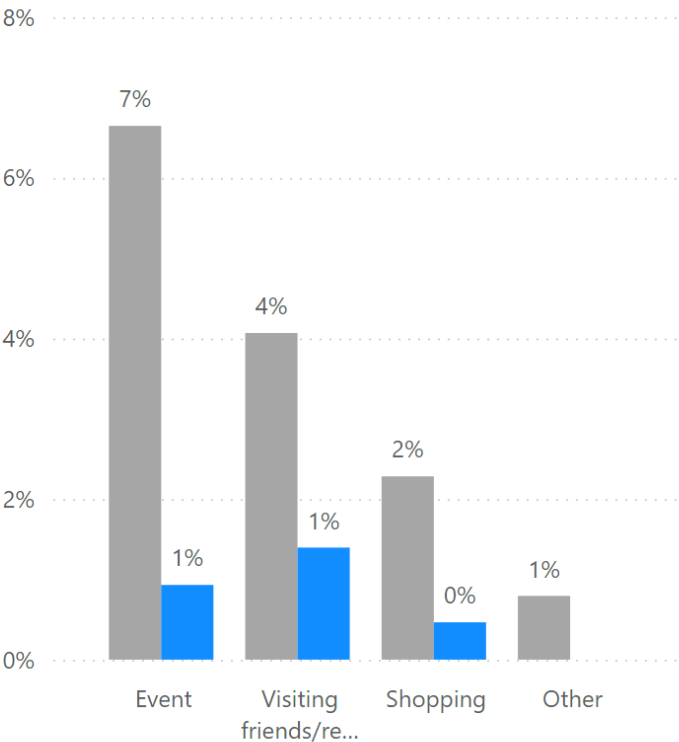
All holiday types
Leisure overnight visitors, 2025

All inbound Netherlands



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

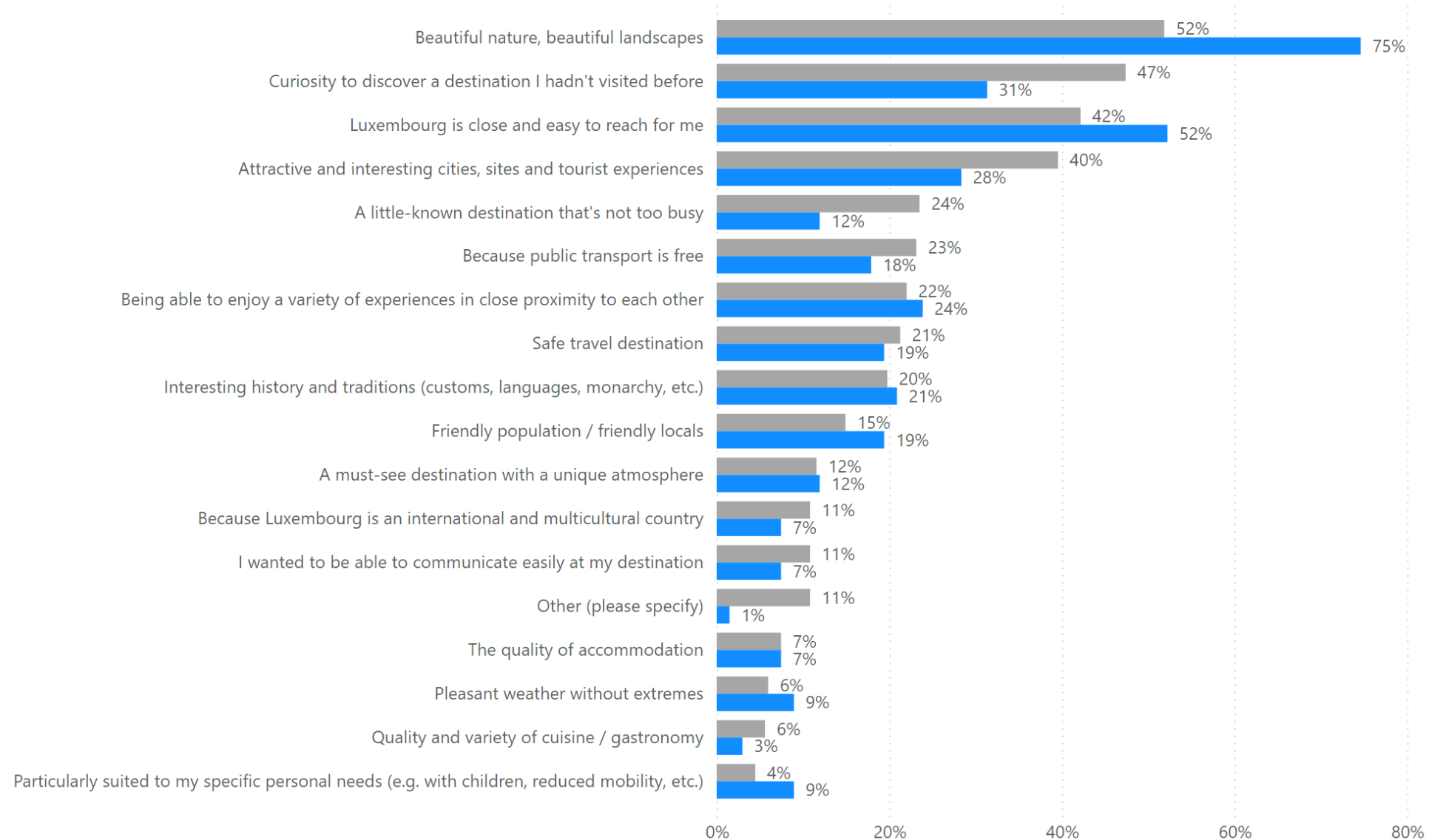
All inbound Netherlands



Reasons for choosing Luxembourg

Leisure overnight visitors, 2025

● All inbound ● Netherlands

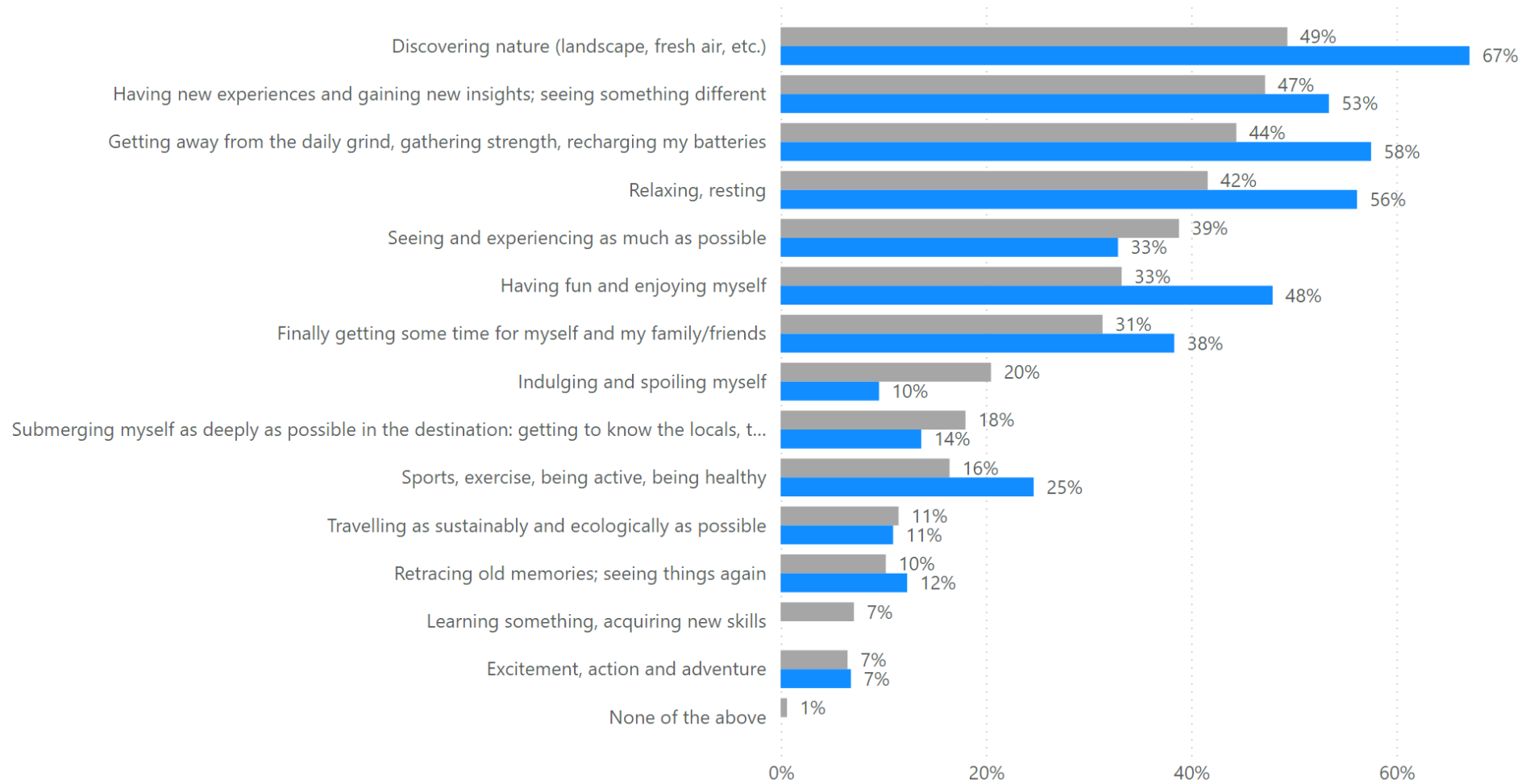




Travel Motives

Leisure overnight visitors, 2025

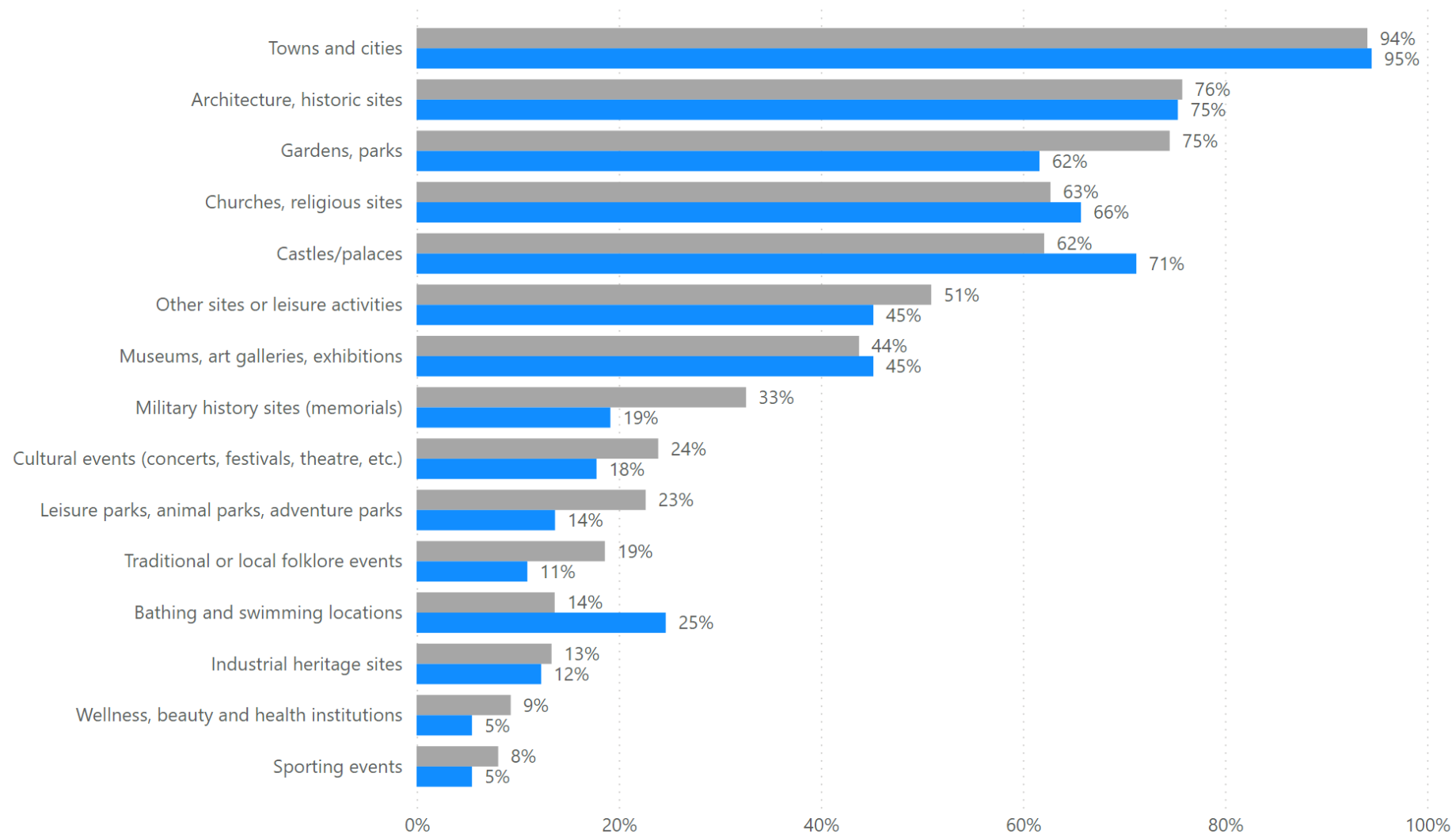
● All inbound ● Netherlands



Places visited

Leisure overnight visitors, 2025

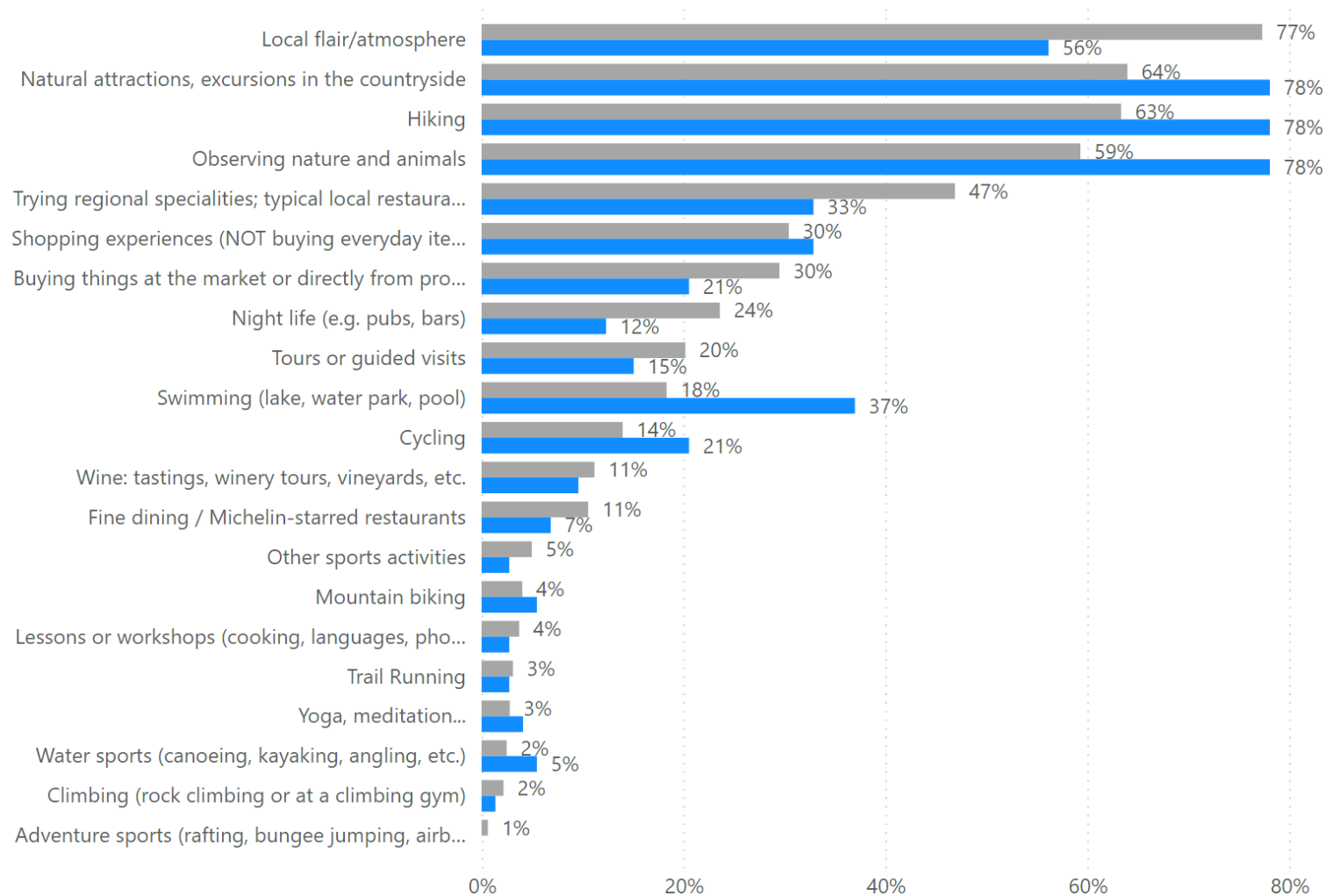
● All inbound ● Netherlands



Activities (sporting and non-sporting)

Leisure overnight visitors, 2025

● All inbound ● Netherlands

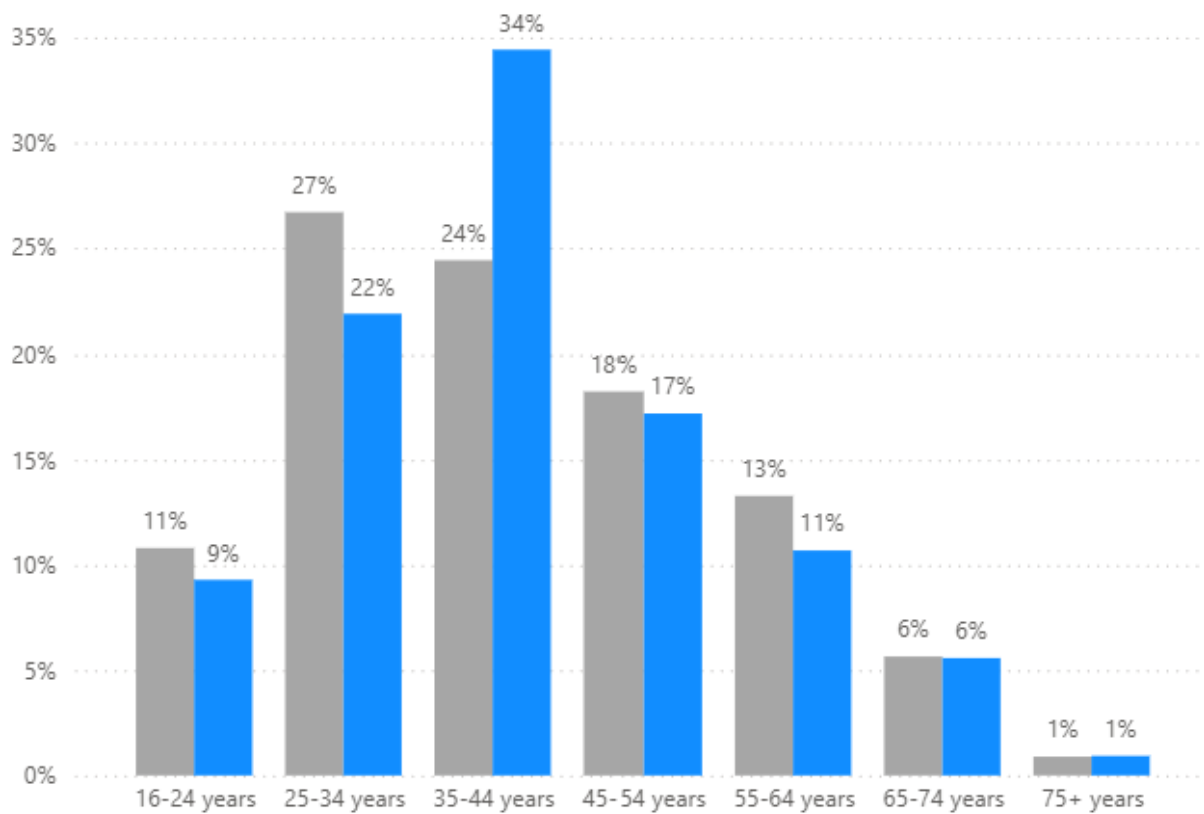




Age

Leisure overnight visitors, 2025

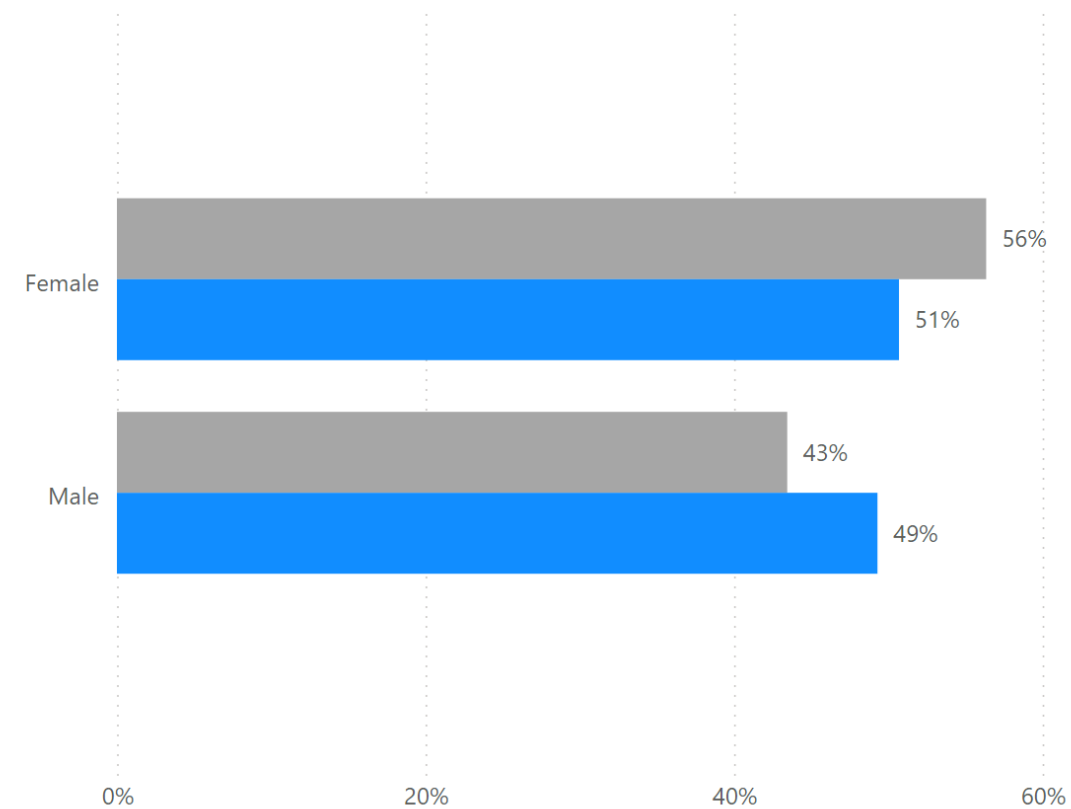
● All inbound ● Netherlands



Gender

Leisure overnight visitors, 2025

● All inbound ● Netherlands

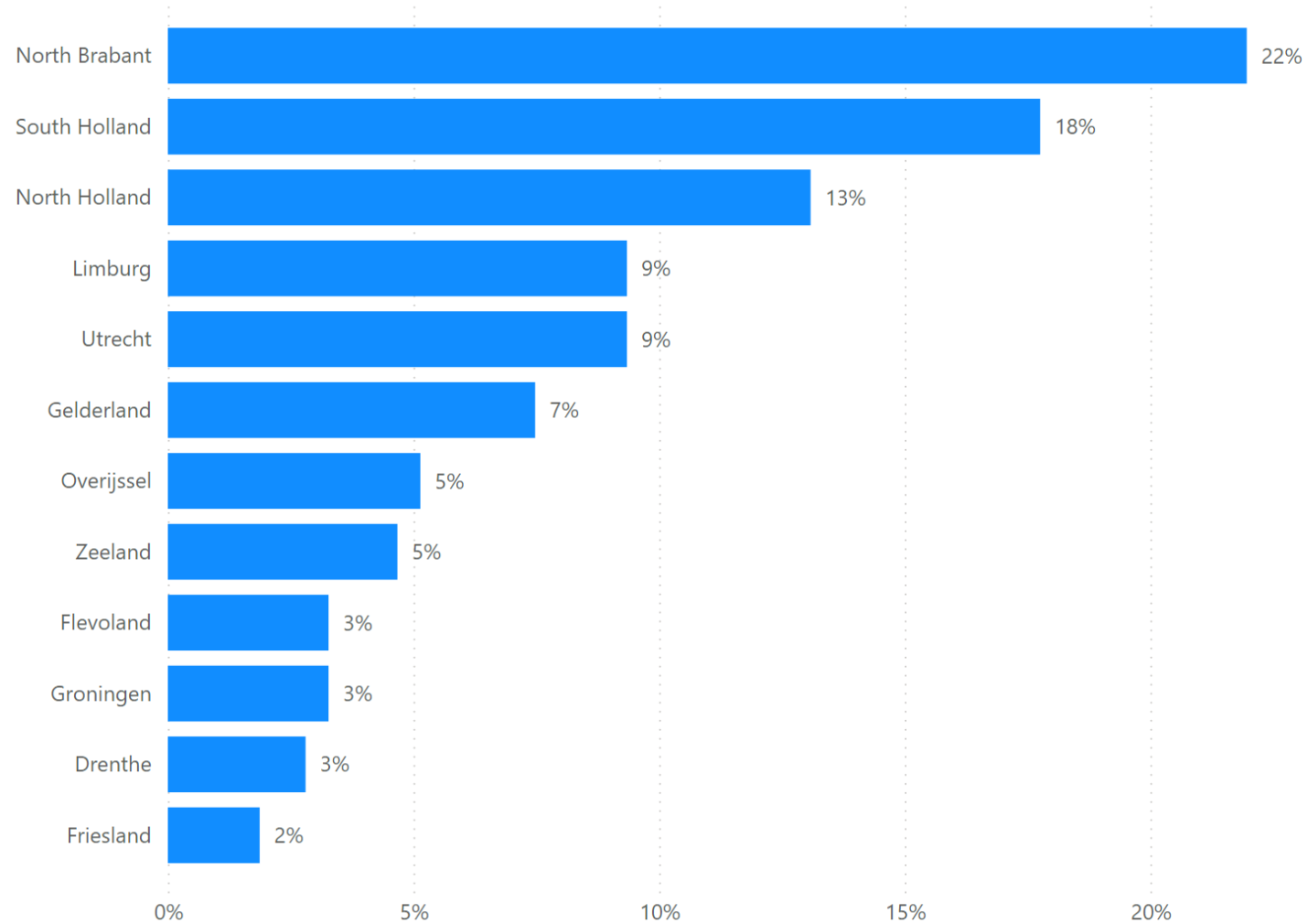




Region of origin

Leisure overnight visitors, 2025

● Netherlands

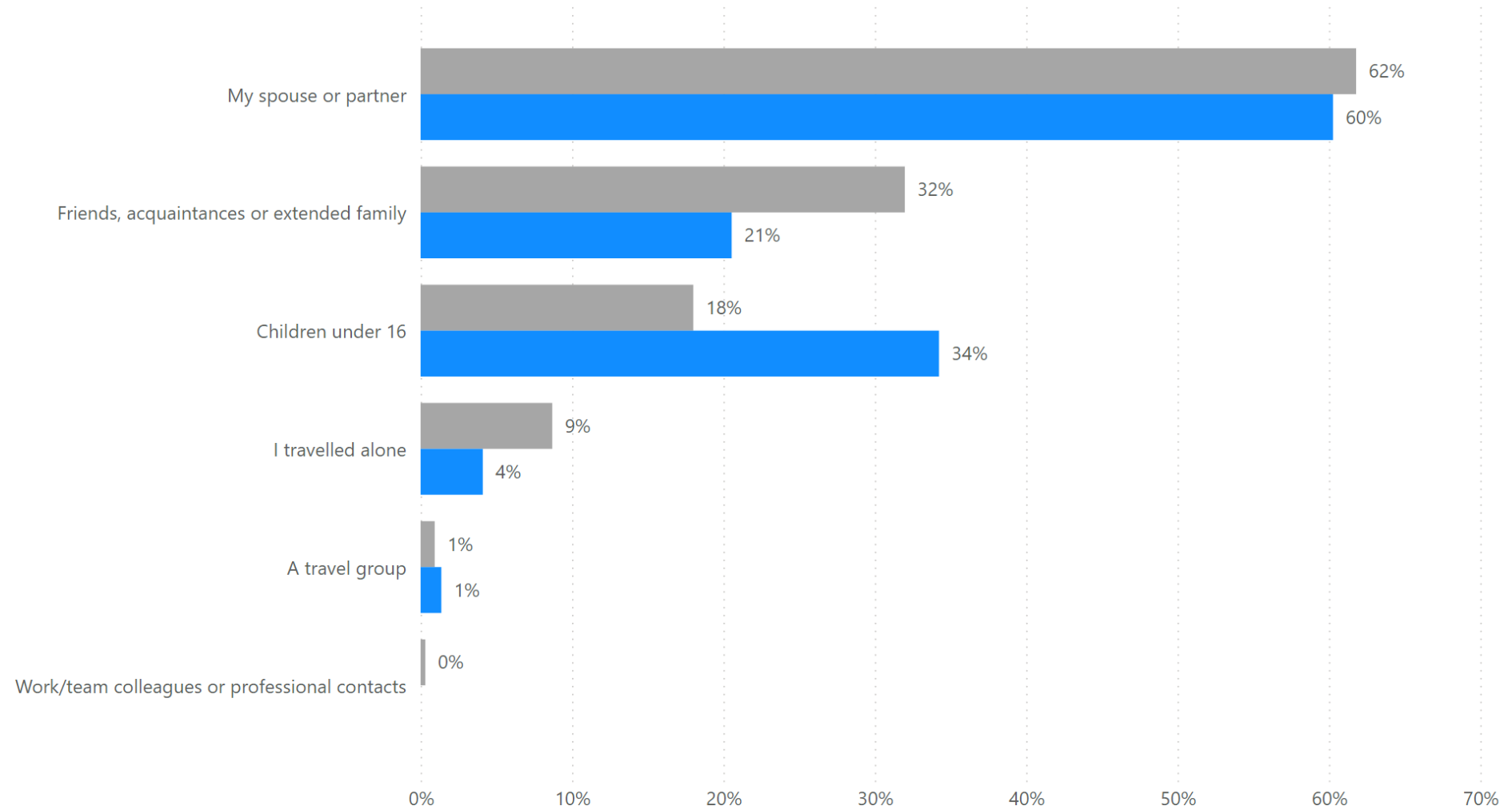




Travel party

Leisure overnight visitors, 2025

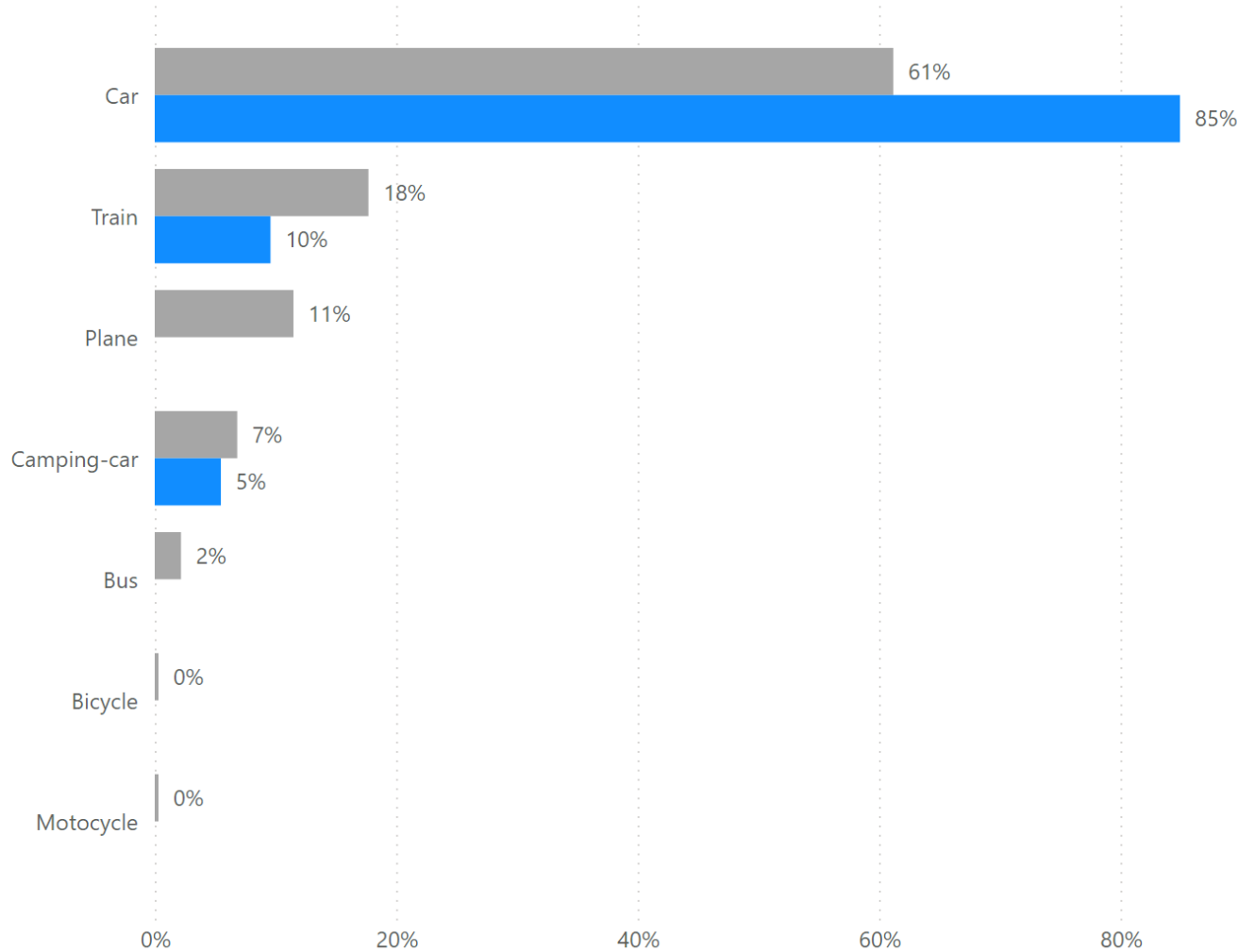
● All inbound ● Netherlands





Transport to destination
Leisure overnight visitors, 2025

● All inbound ● Netherlands



First-time visitors
Leisure overnight visitors, 2025

60%

All inbound

58%

Netherlands

Visitors spending nights in
Luxembourg and abroad
during same trip

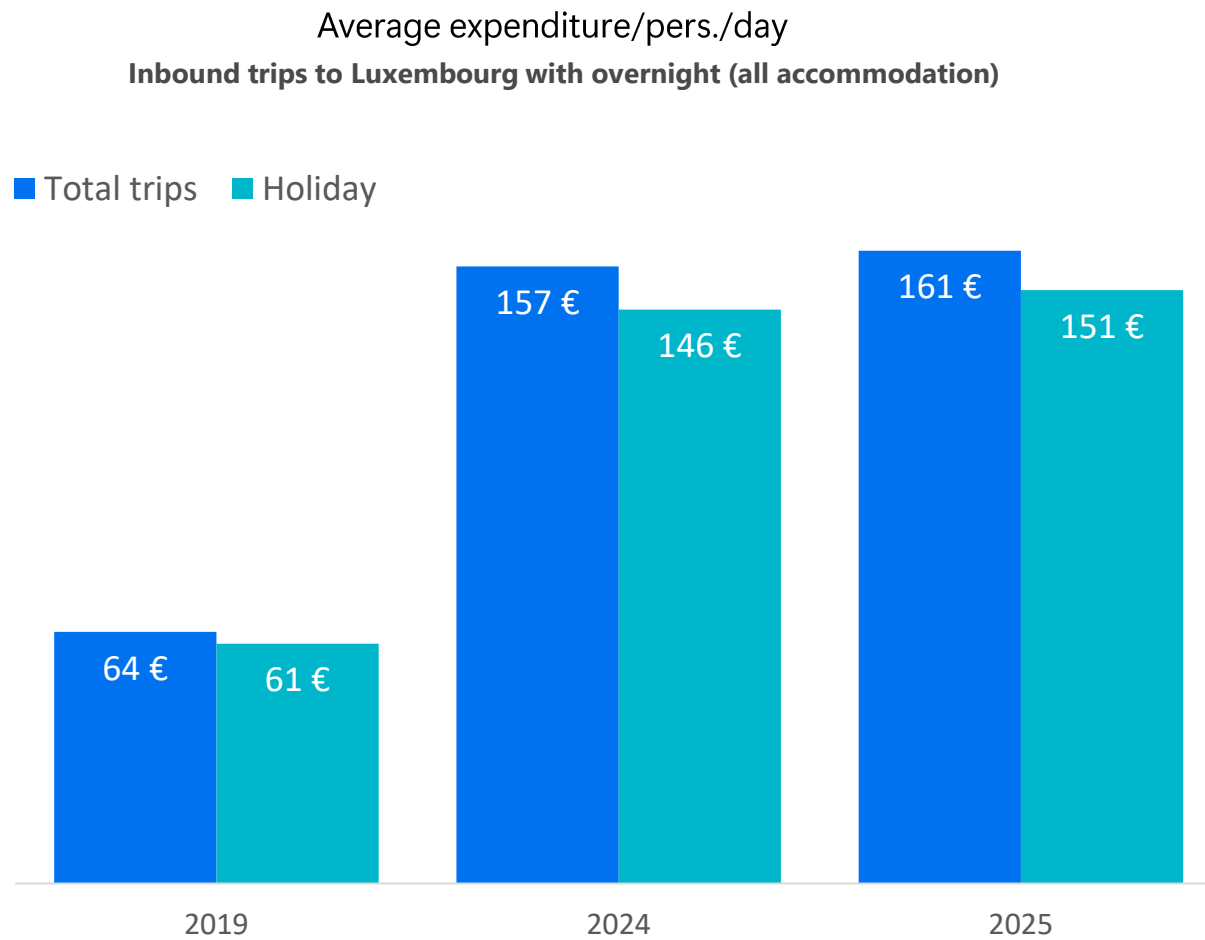
Leisure overnight visitors, 2025

33%

All inbound

29%

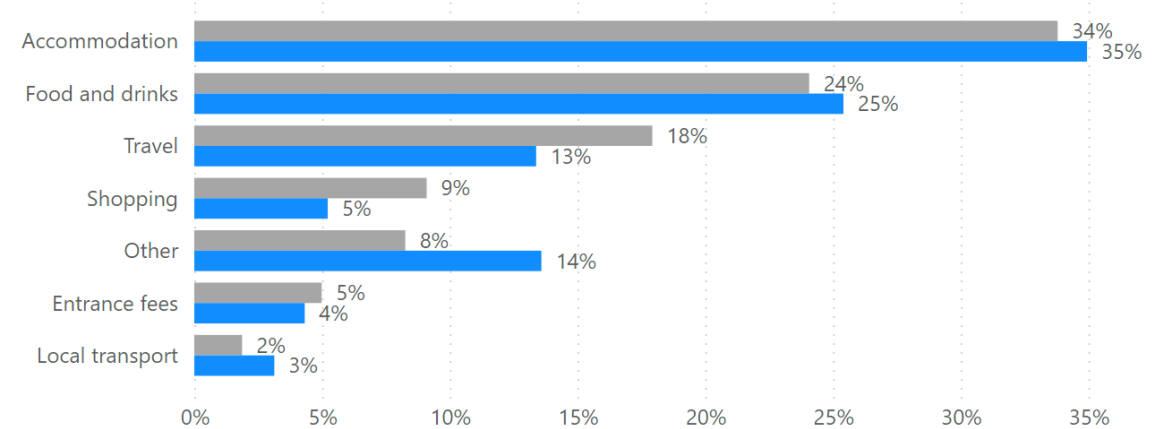
Netherlands



Spending categories

Leisure overnight visitors, 2025

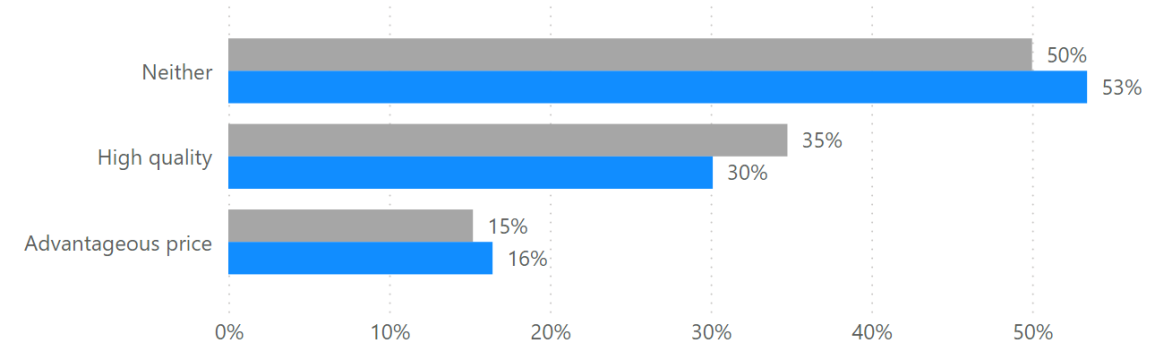
● All inbound ● Netherlands



Quality vs. price orientation

Leisure overnight visitors, 2025

● All inbound ● Netherlands

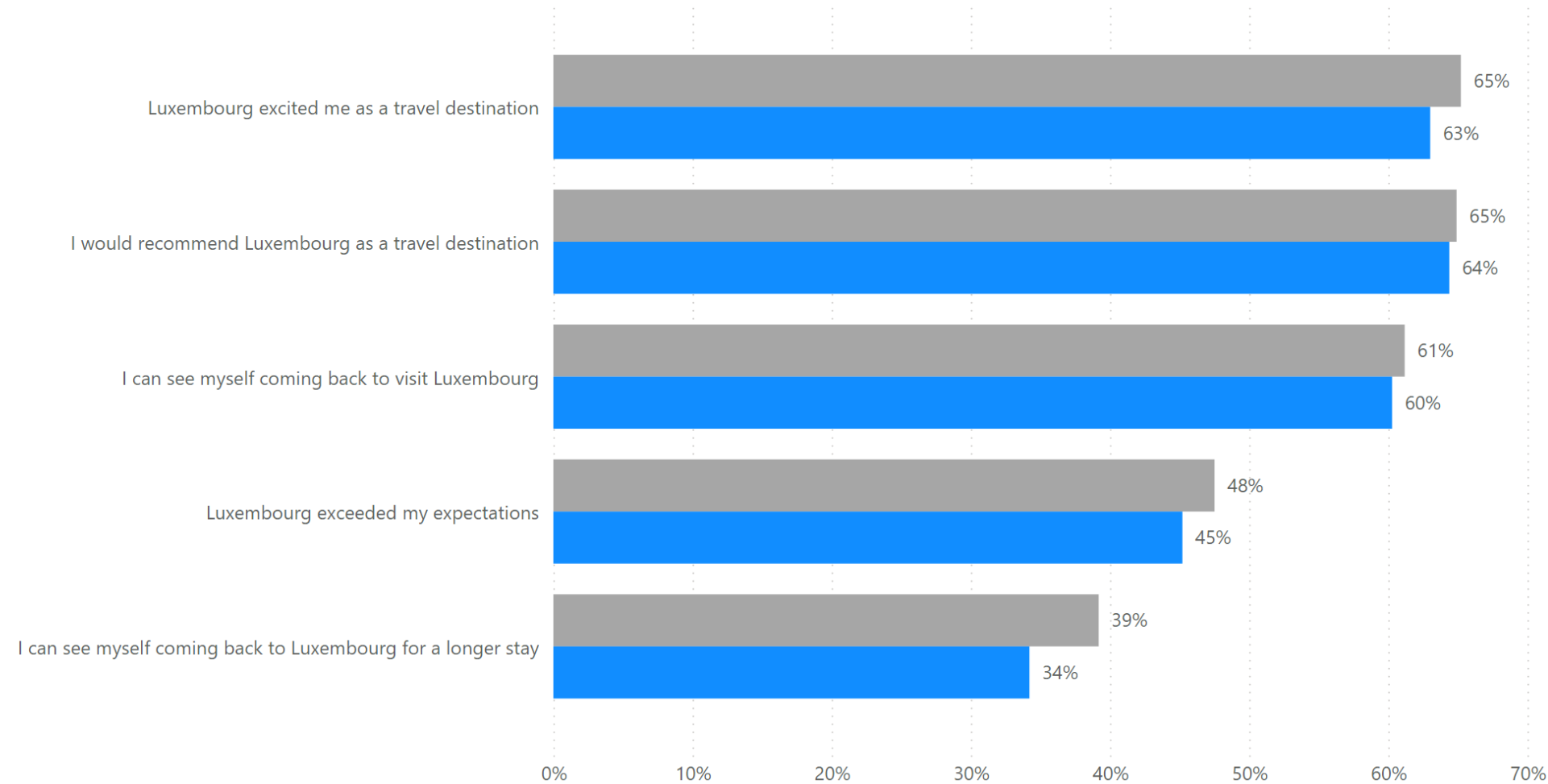




Overall satisfaction - % "strongly agree"

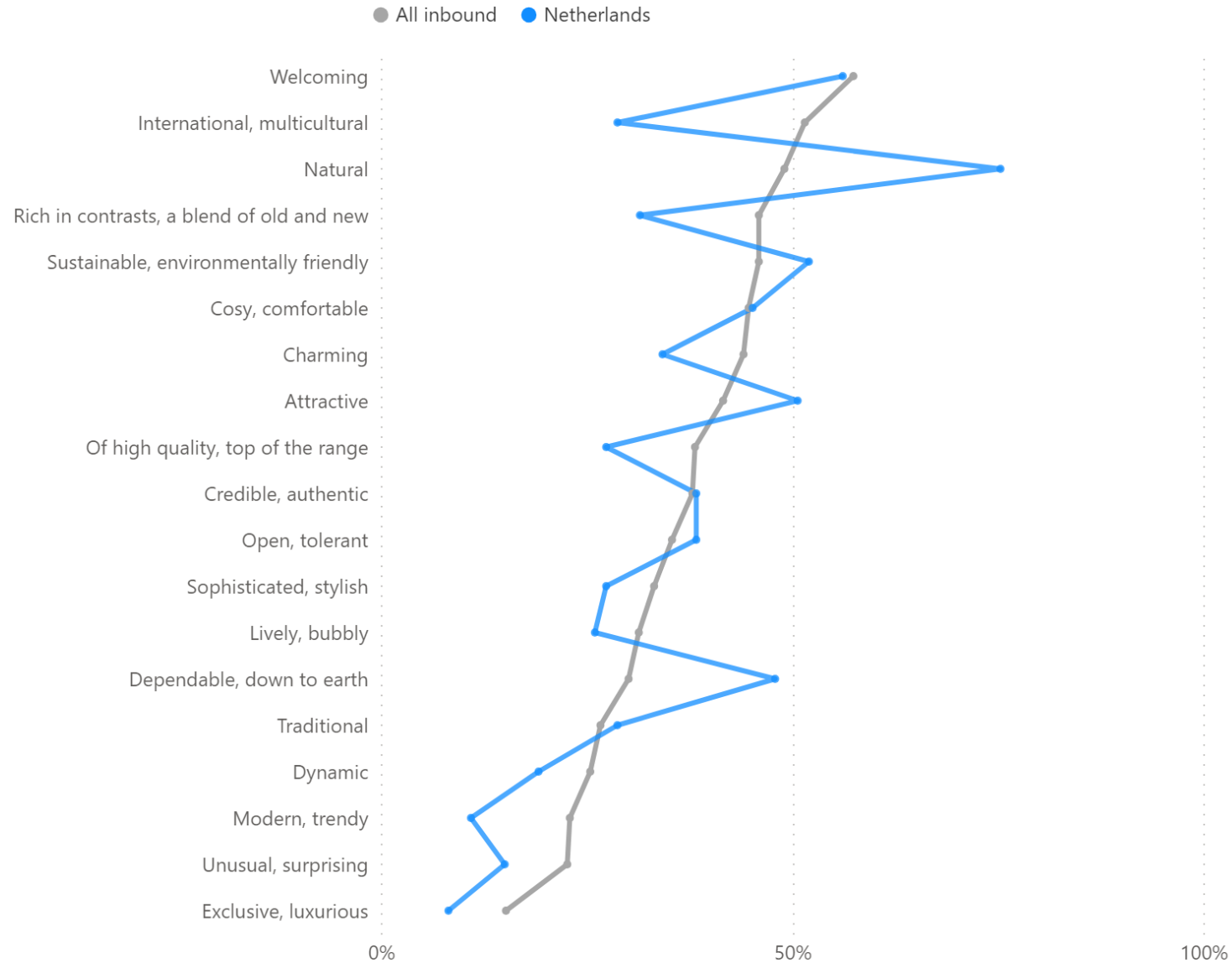
Leisure overnight visitors, 2025

● All inbound ● Netherlands



Brand features

Leisure overnight visitors, 2025





Target segments, Brand & Growth Potential

LFT Target Segments



Netherlands
All inbound

Explorers



Nature-Loving Actives



Relaxation Seekers



Short Breakers



Perfection Seekers

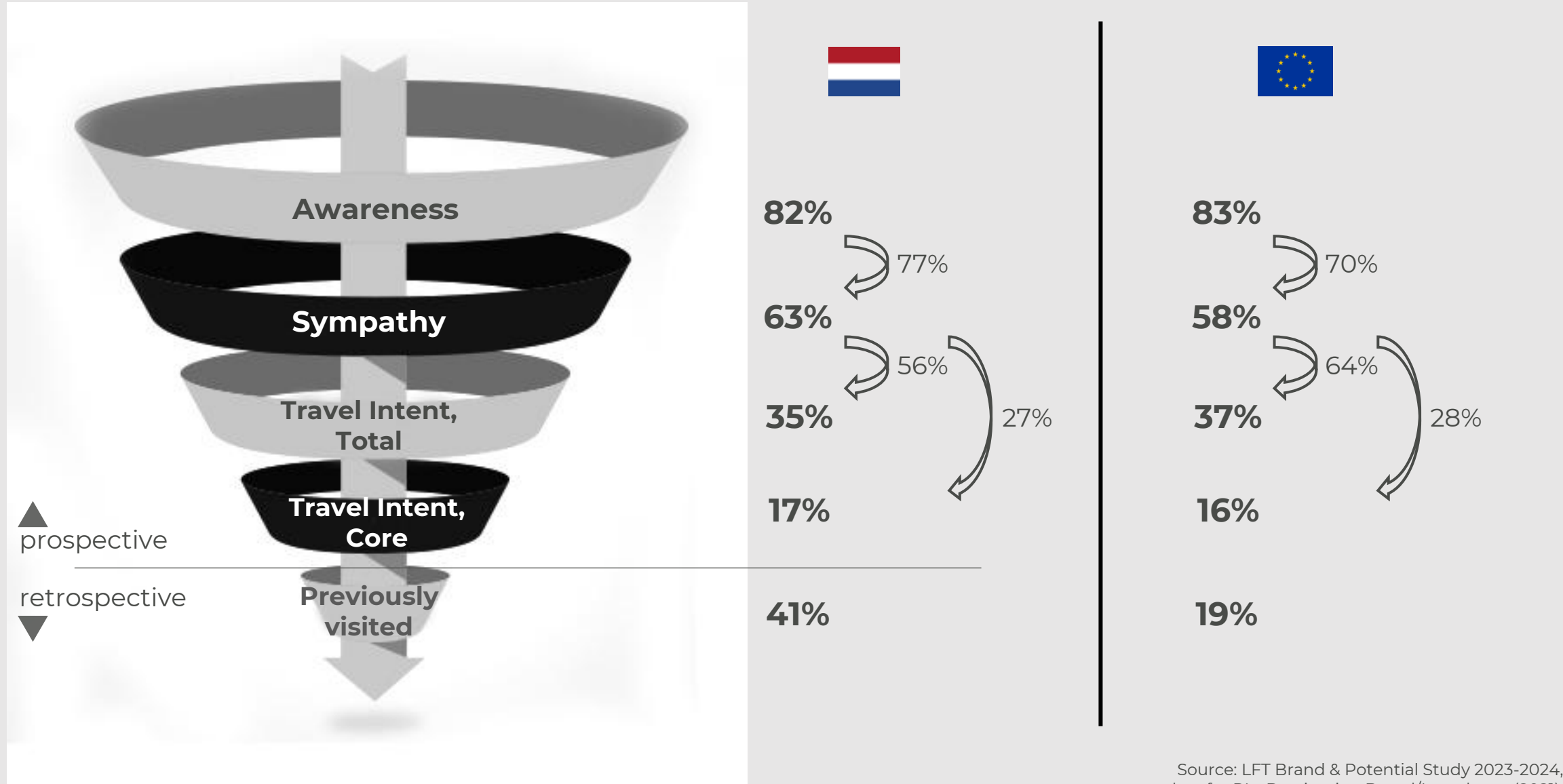


Leisure Oriented



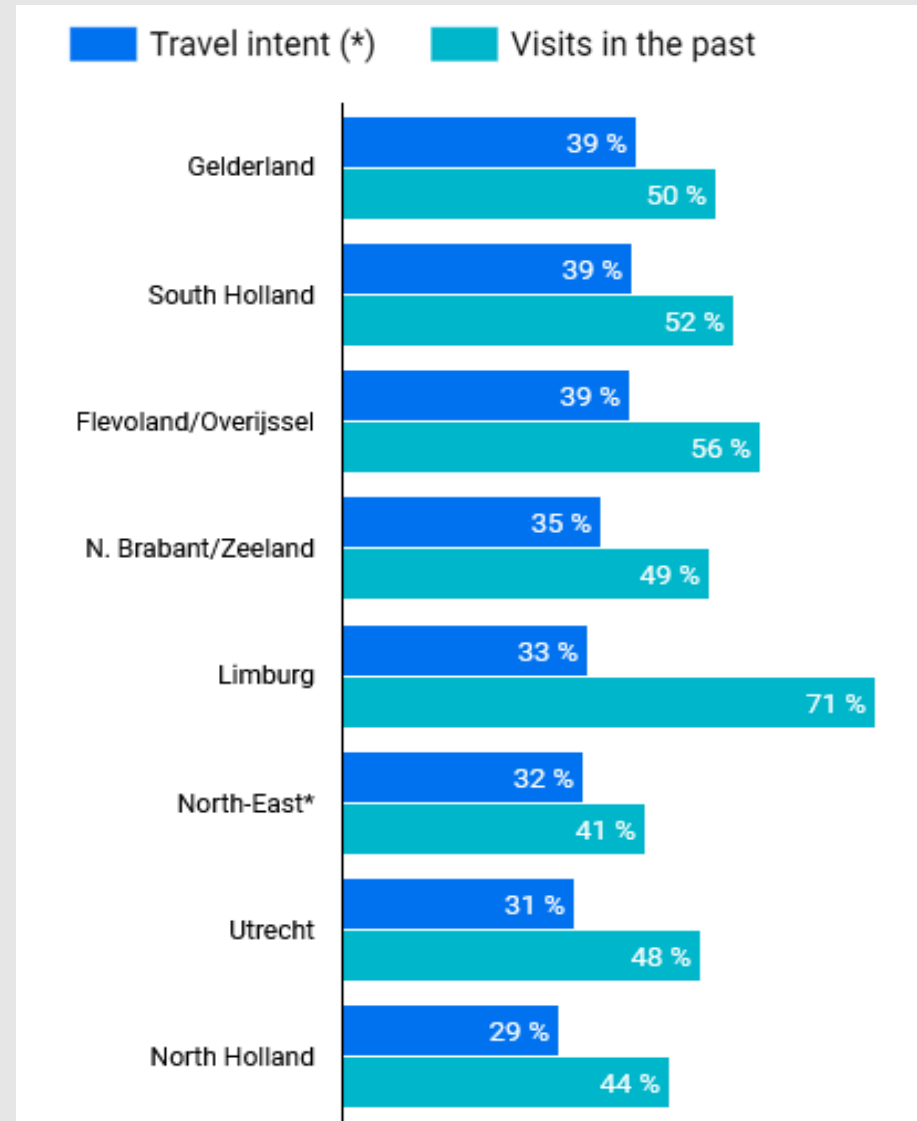
Destination Luxembourg - Brand Funnel 2024

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



Regional origin 2024

Past visitors and future potential



General theme interest (*)



Theme			
	Rank	Rank	% interested
Resting/Relaxation	1	1	70%
Nature	3	2	68%
Culinary	2	3	68%
Sightseeing	4	4	66%
Architecture/townscapes	7	5	63%
City	5	6	62%
Fun/entertainment	8	7	62%
Family	12	8	62%
Hiking	17	9	61%
Immersive travel	6	10	61%
Castles	9	11	58%
Culture	11	12	57%
History/Unesco	10	13	56%
Adventure/action	19	14	54%
Exchanging with locals	13	15	54%
Luxury	24	16	52%
Learning/new skills	14	17	51%
Sustainability	15	18	50%
Shopping	23	19	49%
Events	16	20	48%
Nightlife (**)	20	21	48%
Active-sports	27	22	47%
Cycling	31	23	47%
Countryside	22	24	46%
Wine	21	25	46%
Travelling by train	18	26	46%
Remembrance	26	27	45%
Camping	29	28	45%
Industrial heritage	28	29	42%
Wellness	25	30	41%
Film locations	30	31	39%
MTB	32	32	35%
Motorcycling	33	33	34%

(*) 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
Nature	5	1	54%
Hiking	11	2	52%
Resting/Relaxation	2	3	44%
Family	8	4	36%
Castles	7	5	35%
Camping	19	6	32%
Architecture/townscapes	4	7	31%
Culinary	3	8	30%
City	1	9	29%
MTB	25	10	28%
Cycling	20	11	26%
Active-sports	21	12	26%
Culture	6	13	22%
Adventure/action	22	14	22%
Countryside	17	15	22%
Luxury	9	16	22%
Fun/entertainment	13	17	21%
History/Unesco	12	18	21%
Shopping	10	19	21%
Wine	15	20	19%
Sustainability	18	21	16%
Wellness	16	22	15%
Nightlife (**)	14	23	15%
Remembrance	26	24	13%
Industrial heritage	24	25	11%
Events	23	26	10%

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

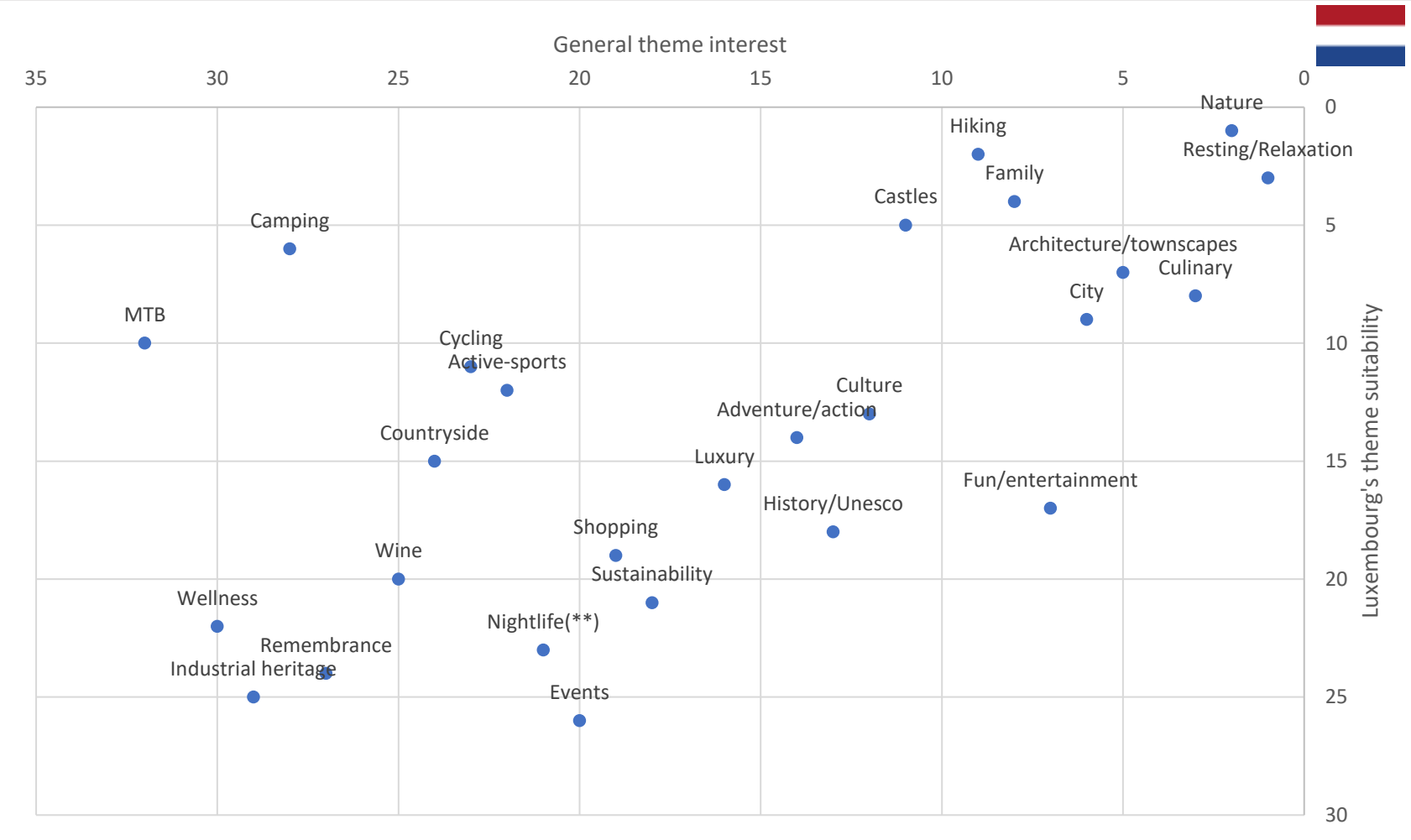
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

(**) 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 (*)



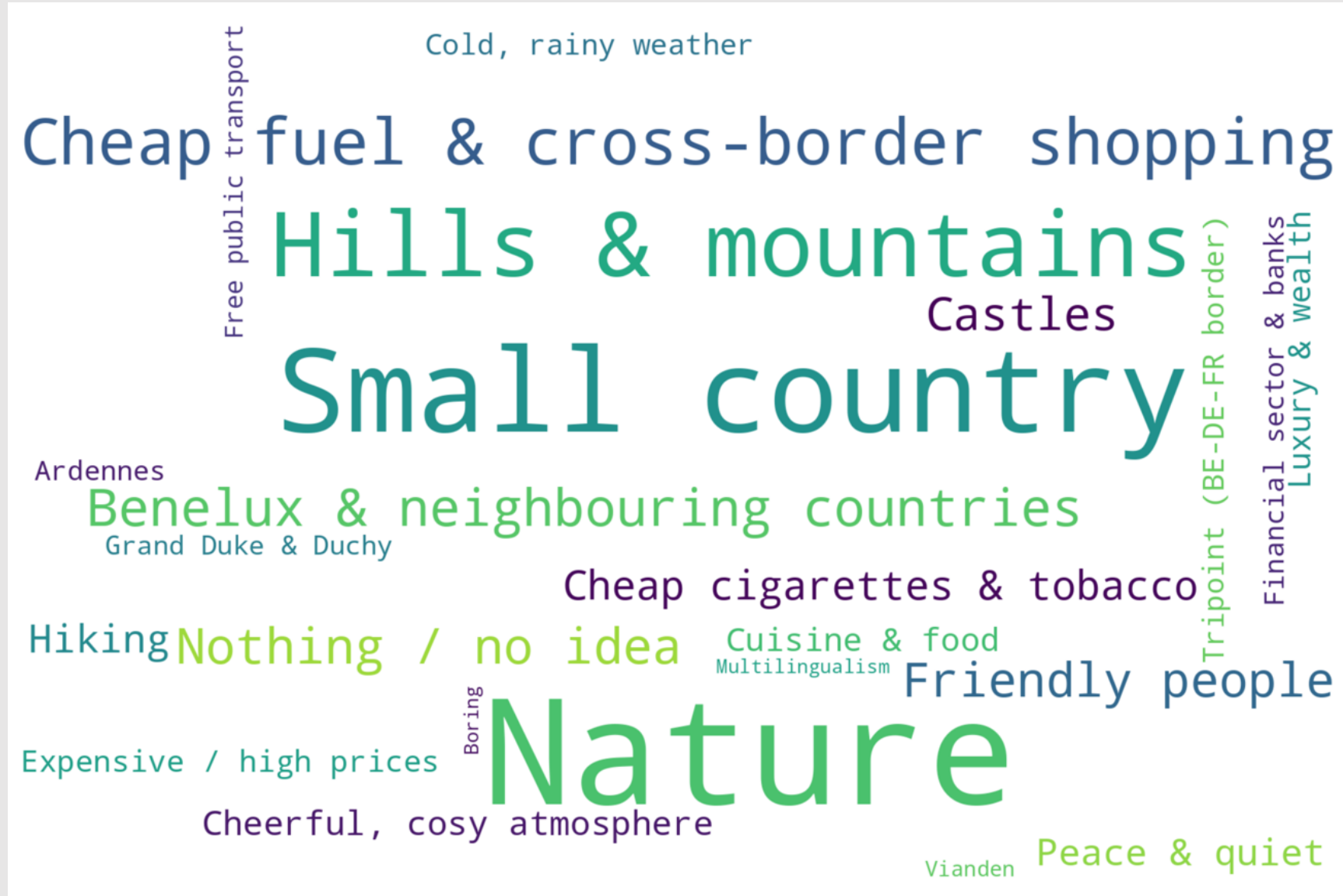
Feature			
	Rank	Rank	% agreeing
safe	1	1	49%
clean	2	2	40%
welcoming, hospitable	4	3	36%
authentic, real	5	4	31%
of high quality	3	5	30%
attractive, appealing	7	6	29%
open-minded, tolerant, international	6	7	25%
surprising	11	8	25%
service oriented	10	9	24%
affordable	16	10	22%
varied, diversified	12	11	21%
exclusive, luxurious	8	12	19%
not overcrowded / insider tip	14	13	18%
lively, trendy	13	14	17%
dynamic, modern	9	15	17%
sustainable	15	16	15%

(*) 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



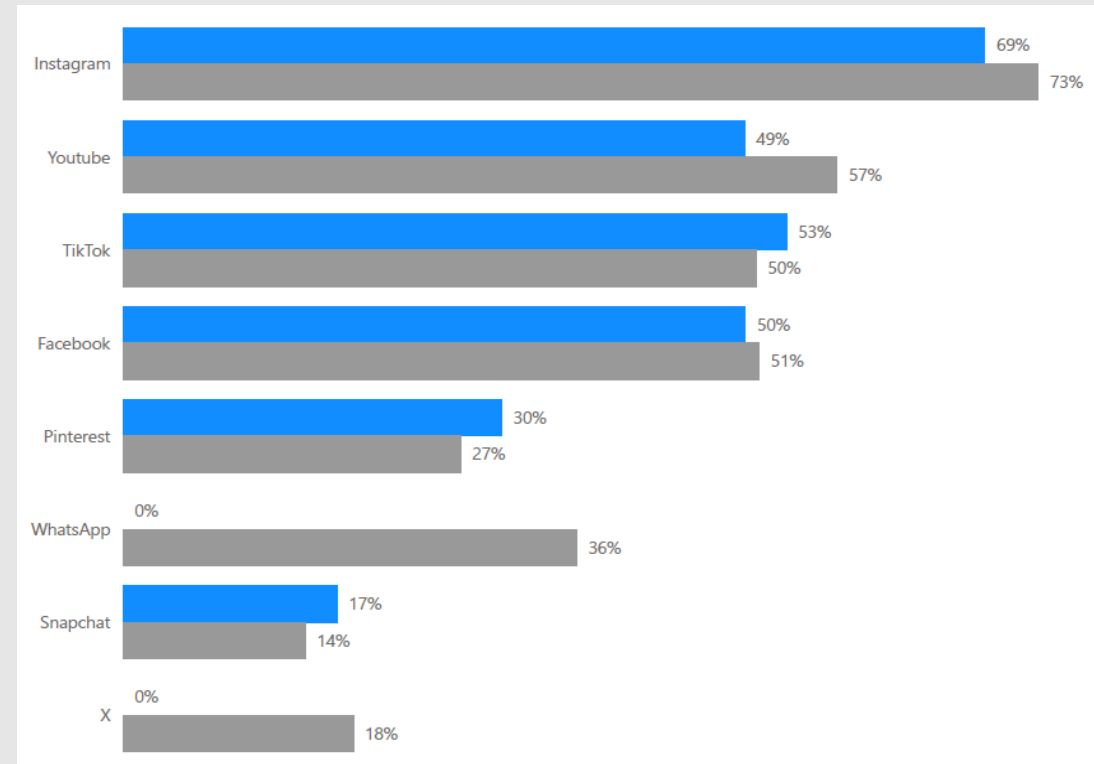
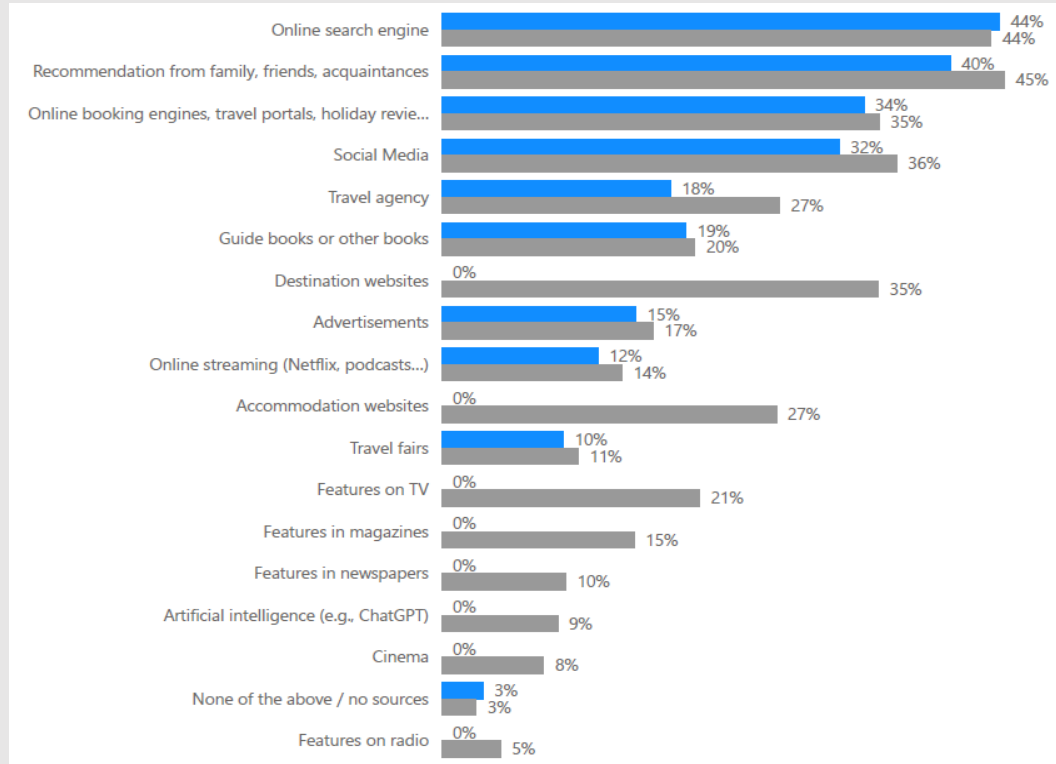
Trip organisation and preferences (1)

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



■ Netherlands
■ 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)

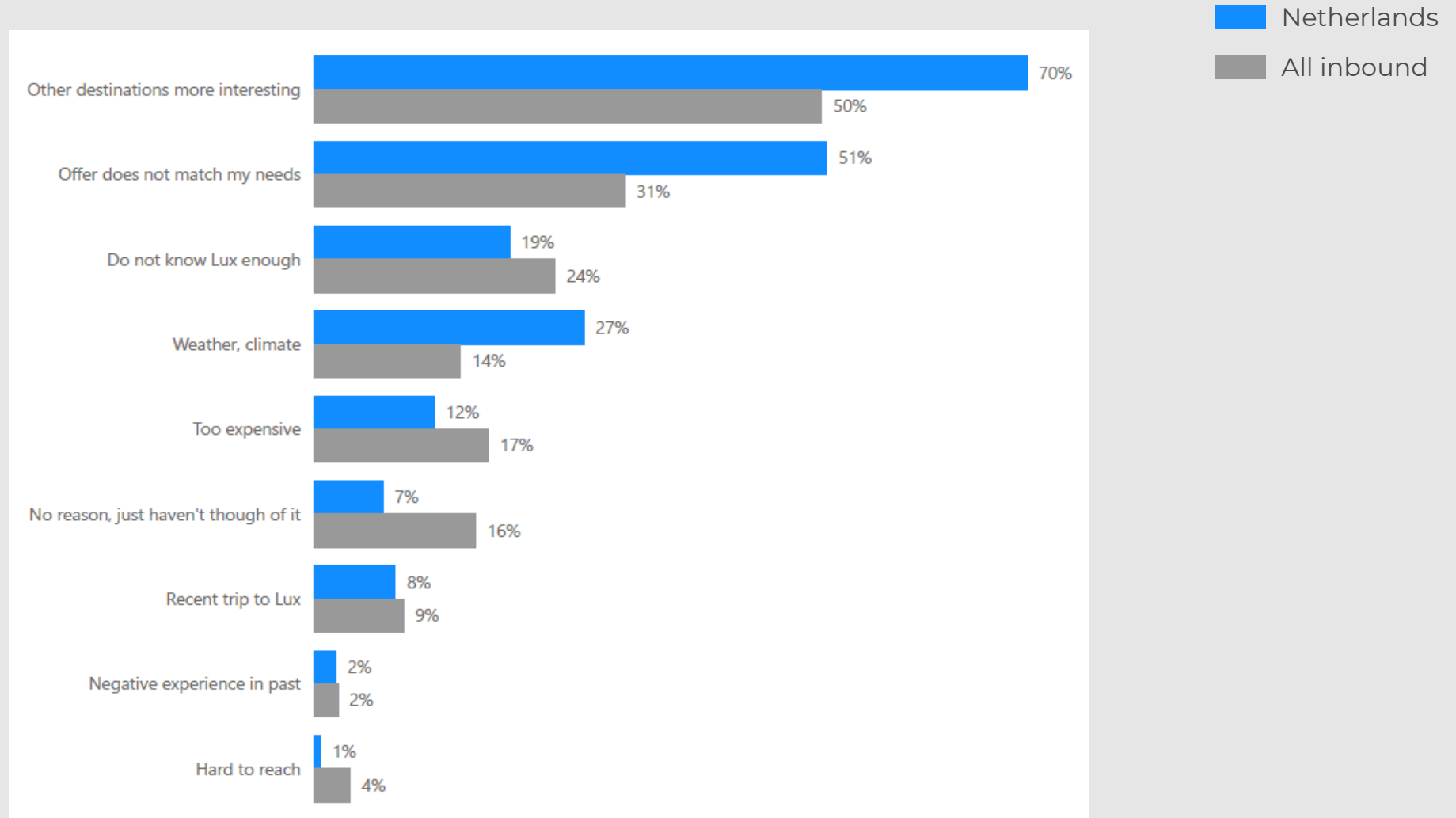


Trip organisation and preferences (2)

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



Reasons for not considering Luxembourg as a destination

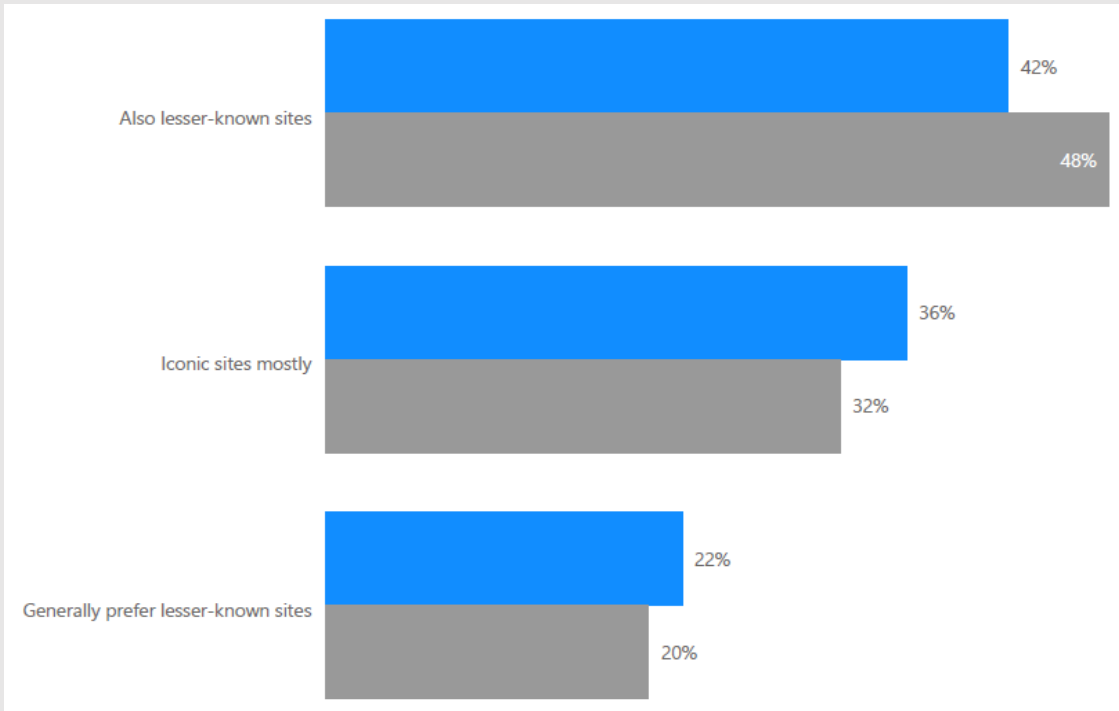


Trip organisation and preference (3)

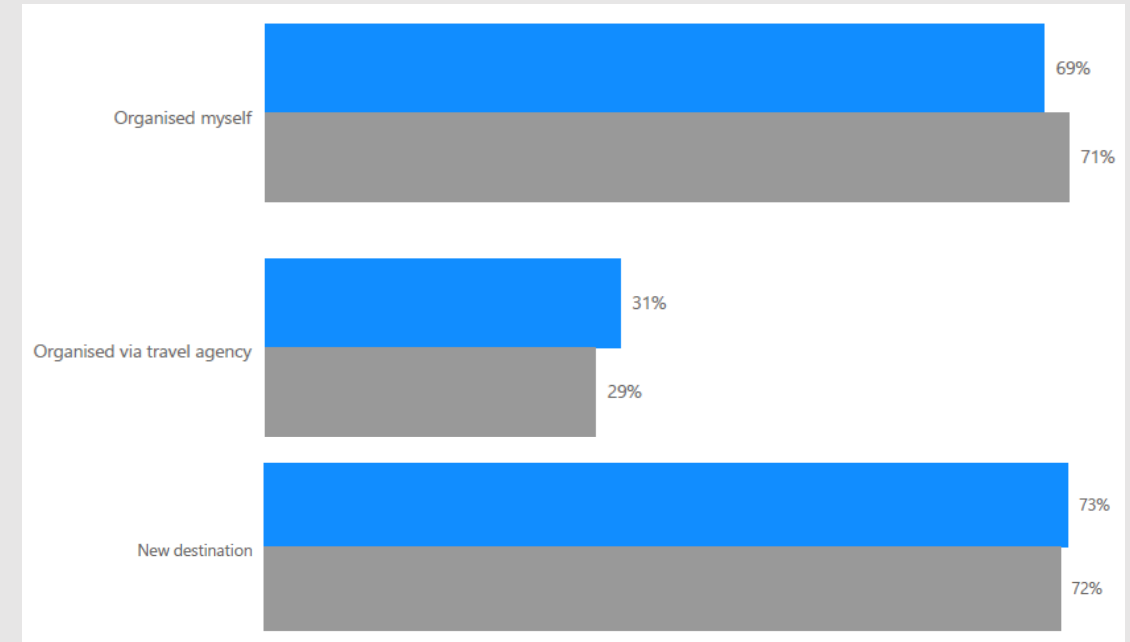
— Average **European source markets**, total vs. Netherlands



General preference for visiting iconic vs. lesser-known sites



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



 Netherlands
 All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



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