



Luxembourg for Tourism

Market profile

SPAIN

2025

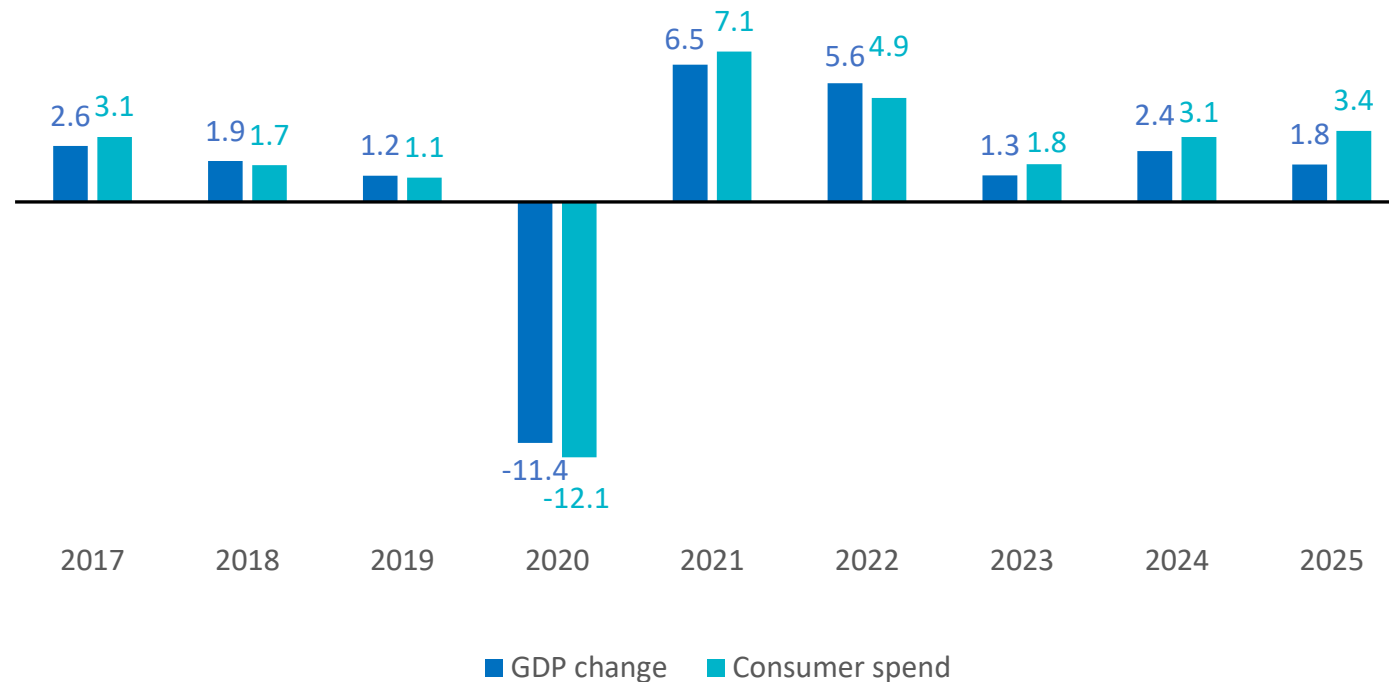


Economic indicators & General Travel Demand

Economic indicators – General travel demand



GDP and consumer spending, % annual change



Economy & population

GDP (PPP, \$) per capita
49,318

Unemployment (%)
10.5

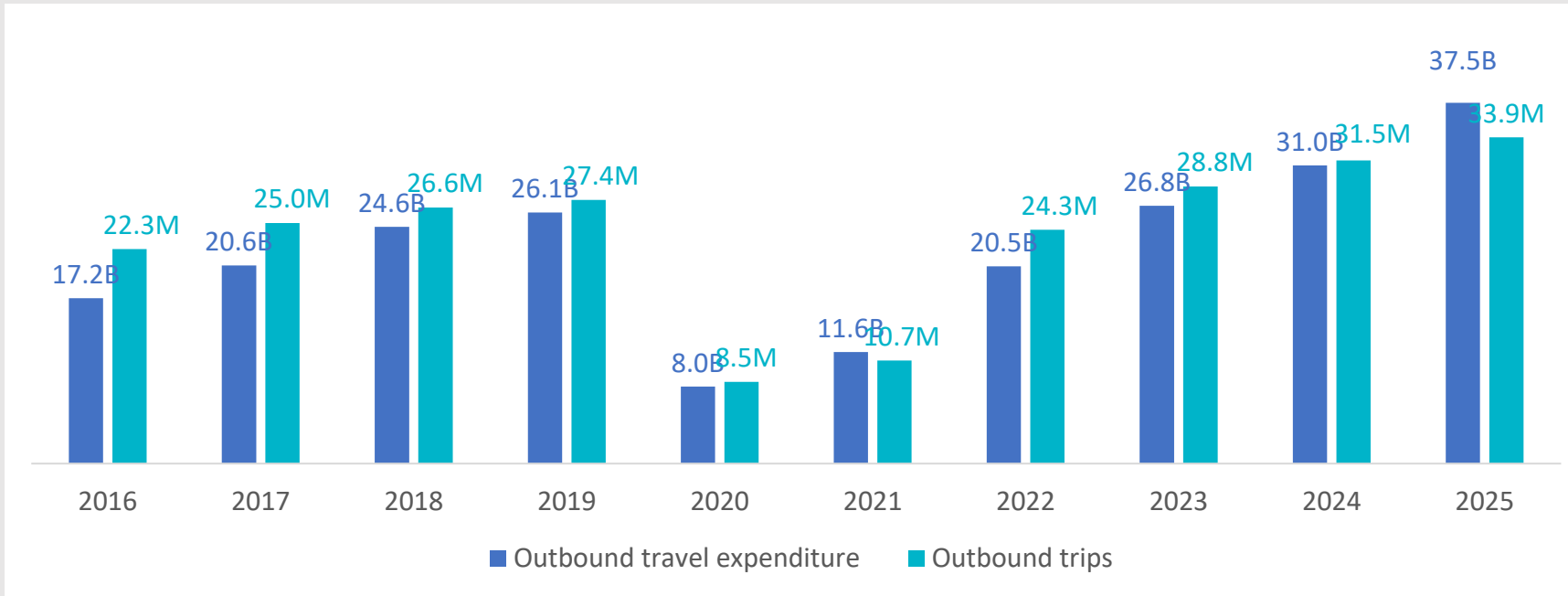
Inflation(%)
2.7

Population
47,889,958

Economic indicators – General travel demand



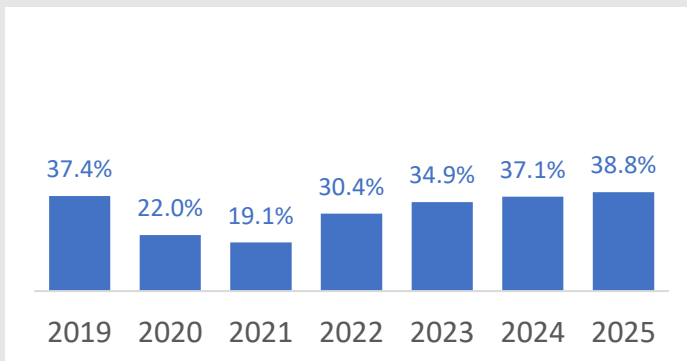
Outbound trips and travel expenditure



Outbound travel intensity
0.71 trips
per inhabitant (2025)

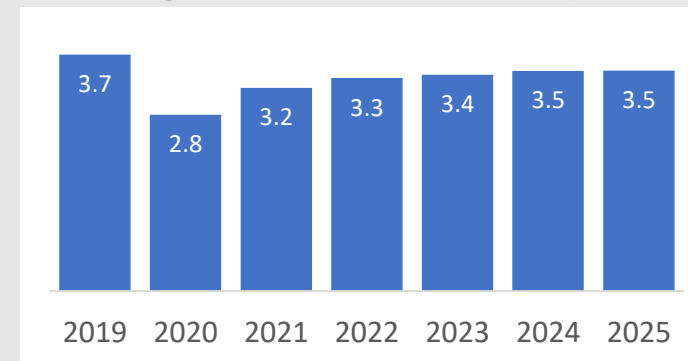
Average spend
per outbound trip (2025)
1,106 \$

Share of outbound travel, % all nights



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

Average length of stay, nights, all outbound trips





Arrivals & nights in paid accommodation

Nights in paid accommodation

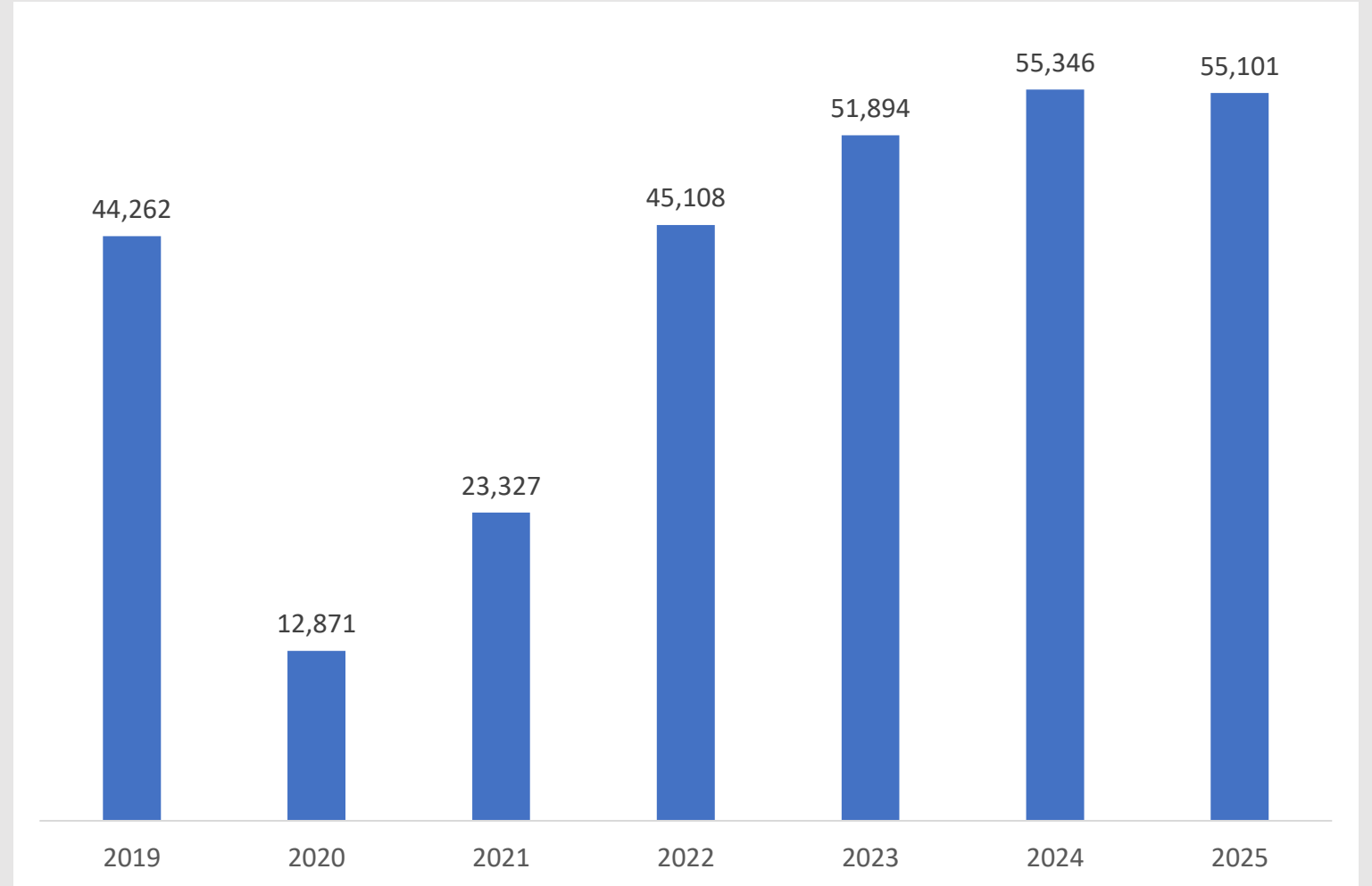
2025 and 2019-2025



Nights,
paid accommodation, 2025



-0% (vs. 2024)
+24% (vs. 2019)



Arrivals in paid accommodation

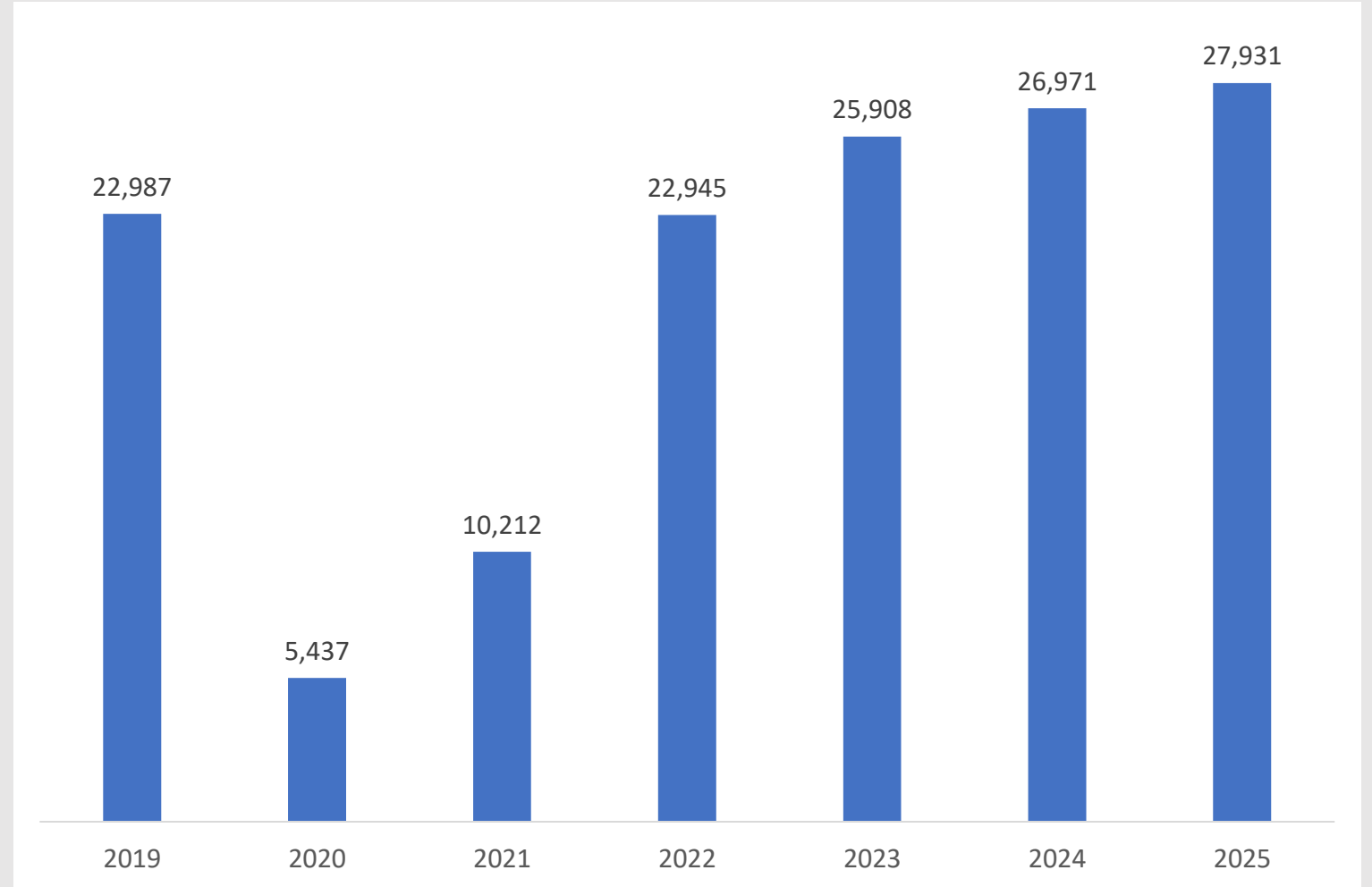
2025 and 2019-2025



Arrivals,
paid accommodation, 2025



+4% (vs. 2024)
+22% (vs. 2019)



Length of stay, paid accommodation

2025 and 2019-2025

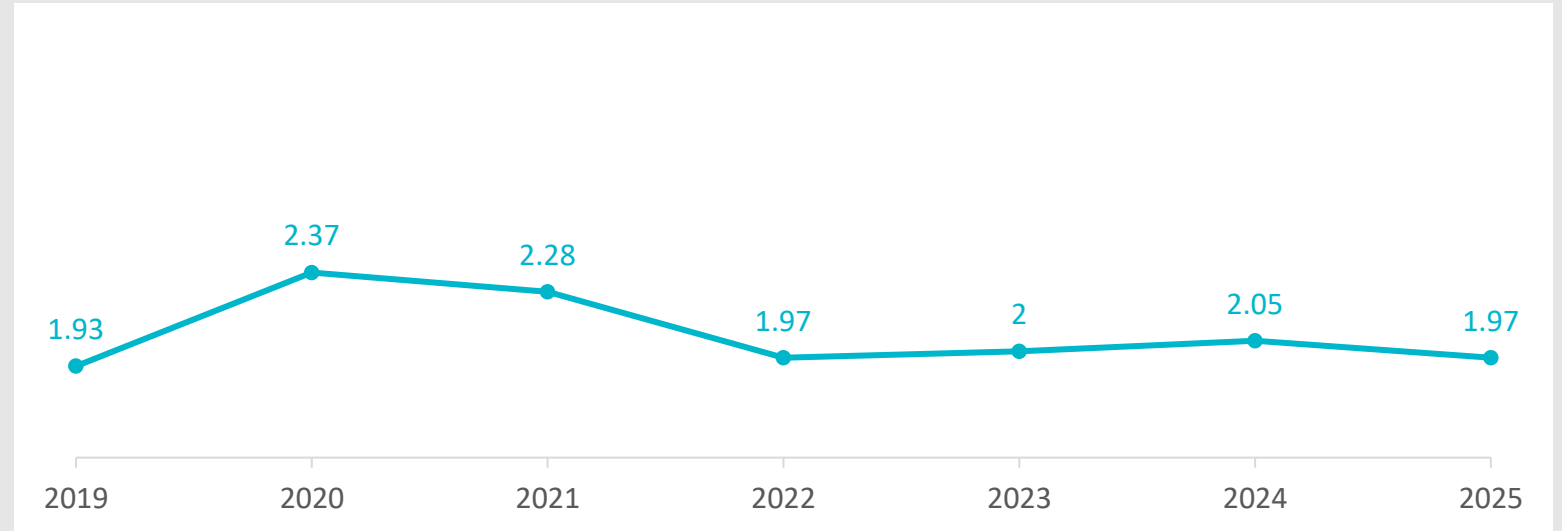


Average length of stay,
paid accommodation, 2025



-0.08 nights (vs. 2024)

+0.04 nights (vs. 2019)

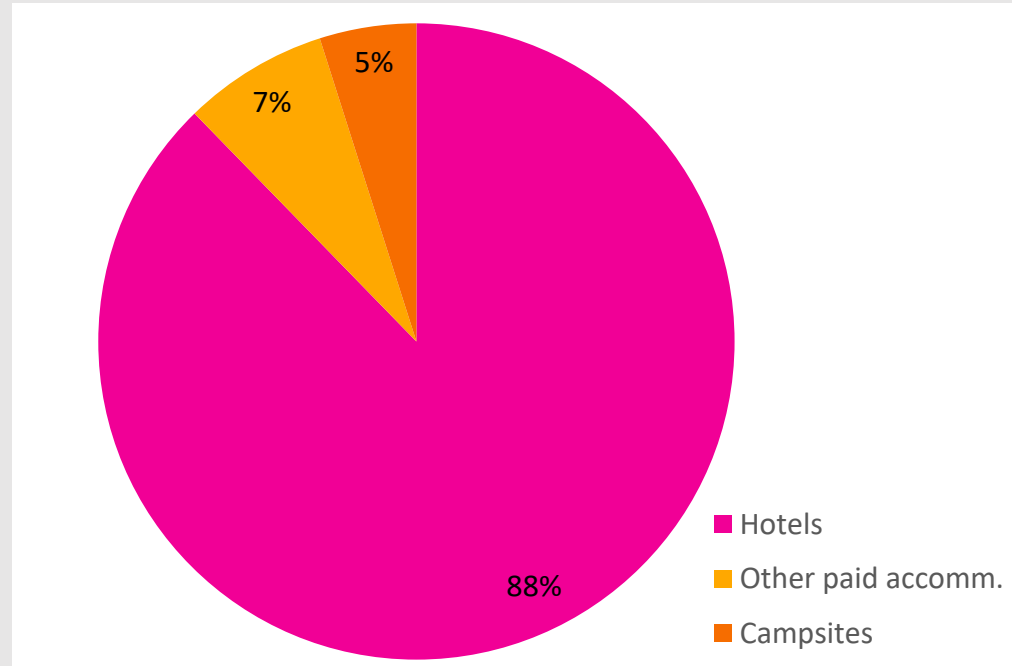


Nights & arrivals in paid accommodation

Type of accommodation, 2025

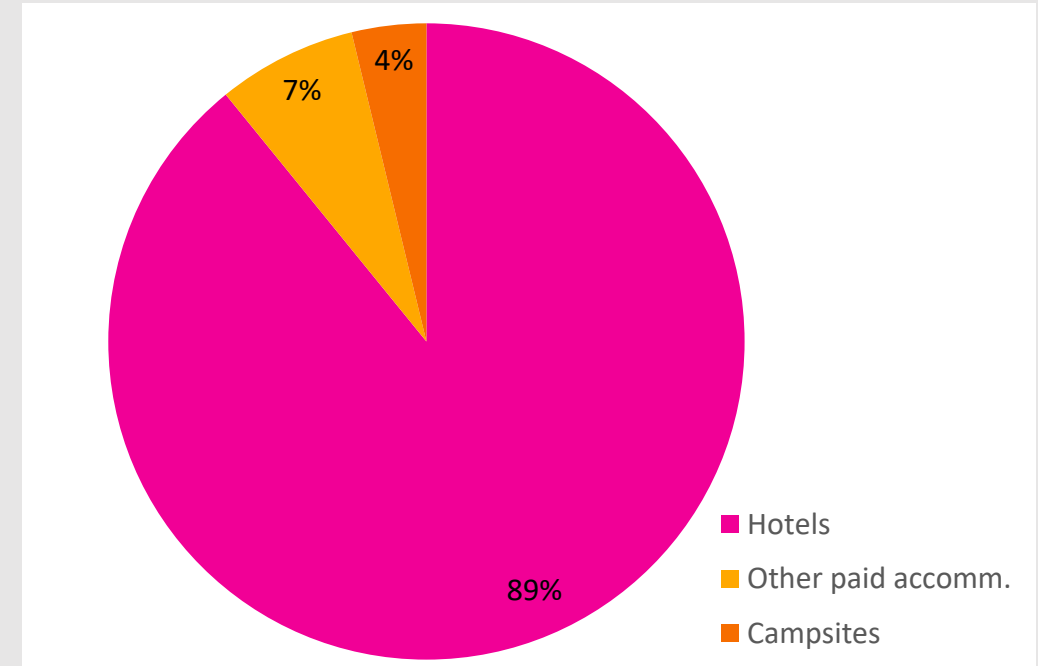


Nights,
paid accommodation, 2025



Hotels	48.332	+0% (vs. 2024)	+34% (vs. 2019)
Other paid accomm.	4.062	-7% (vs. 2024)	-27% (vs. 2019)
Campsites	2.707	-1% (vs. 2024)	+0% (vs. 2019)

Arrivals,
paid accommodation, 2025



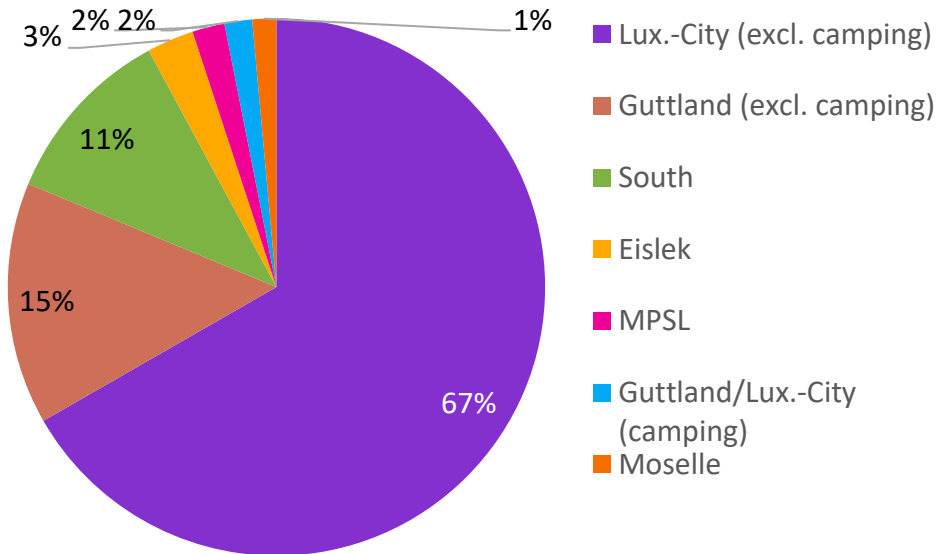
Hotels	24.897	+4% (vs. 2024)	+29% (vs. 2019)
Other paid accomm.	1.977	-4% (vs. 2024)	-26% (vs. 2019)
Campsites	1.057	-2% (vs. 2024)	+7% (vs. 2019)

Nights & arrivals in paid accommodation

Regions, 2025

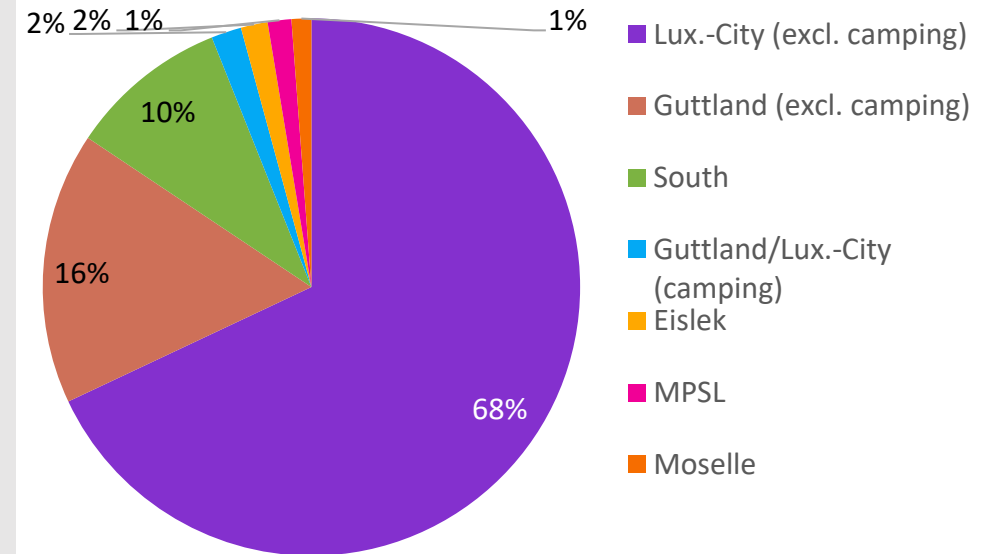


Nights, paid accommodation, 2025



Lux.-City (excl. camping)	36.755	+5% (vs. 2024)	+33% (vs. 2019)
Guttland (excl. camping)	8.027	-15% (vs. 2024)	+39% (vs. 2019)
South	5.976	-8% (vs. 2024)	-8% (vs. 2019)
Éislek	1.559	+52% (vs. 2024)	+4% (vs. 2019)
MPSL	1.072	-16% (vs. 2024)	+25% (vs. 2019)
Guttland/Lux.-City (camping)	917	-14% (vs. 2024)	-16% (vs. 2019)
Moselle	795	-13% (vs. 2024)	-23% (vs. 2019)

Arrivals, paid accommodation, 2025



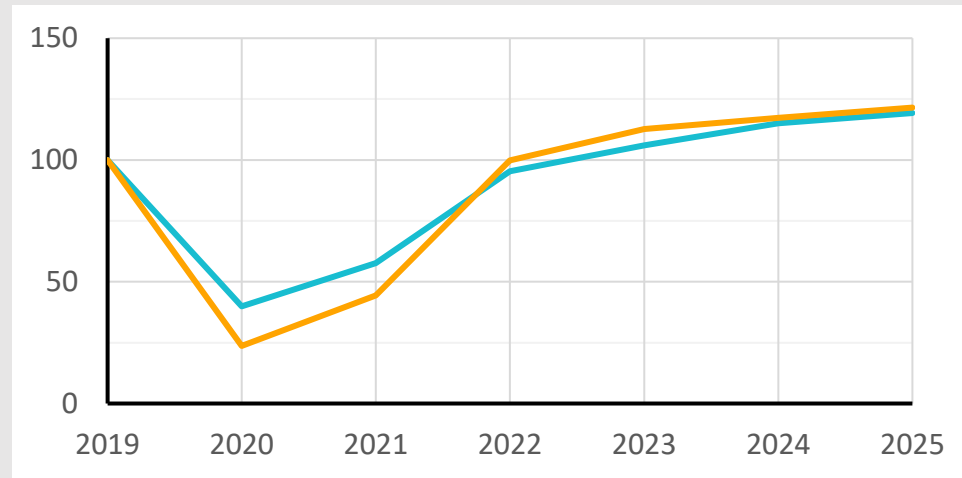
Lux.-City (excl. camping)	18.992	+14% (vs. 2024)	+31% (vs. 2019)
Guttland (excl. camping)	4.572	-15% (vs. 2024)	+53% (vs. 2019)
South	2.679	-16% (vs. 2024)	-25% (vs. 2019)
Guttland/Lux.-City (camping)	507	+5% (vs. 2024)	-28% (vs. 2019)
Éislek	451	-12% (vs. 2024)	-5% (vs. 2019)
MPSL	398	-8% (vs. 2024)	+28% (vs. 2019)
Moselle	332	-5% (vs. 2024)	-20% (vs. 2019)

Arrivals in paid accommodation

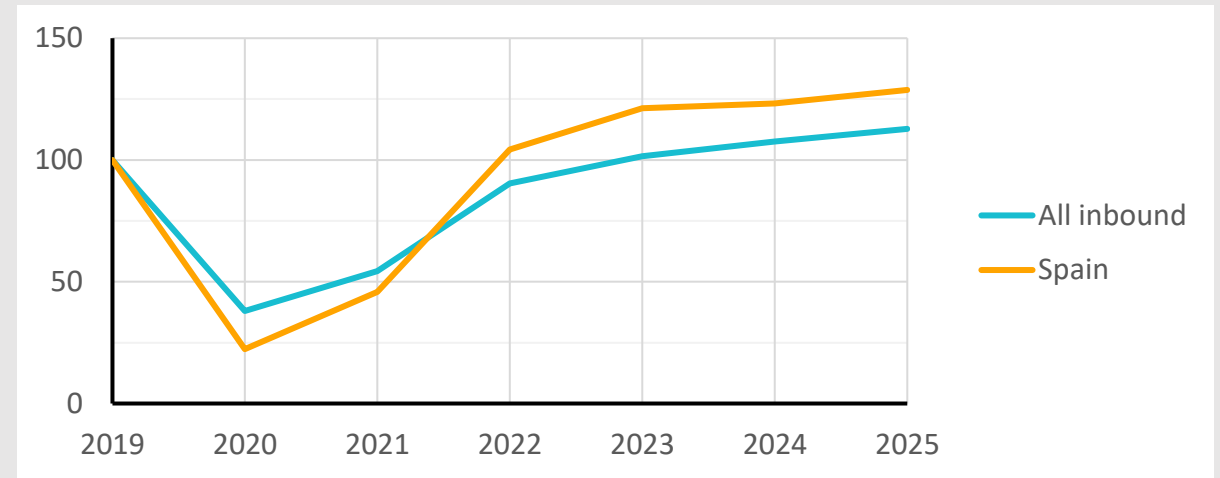
Trends 2019-2025



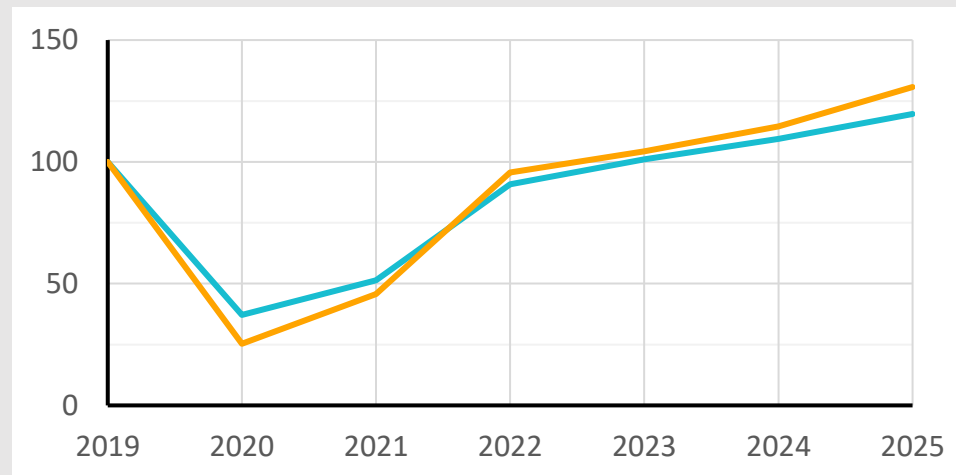
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

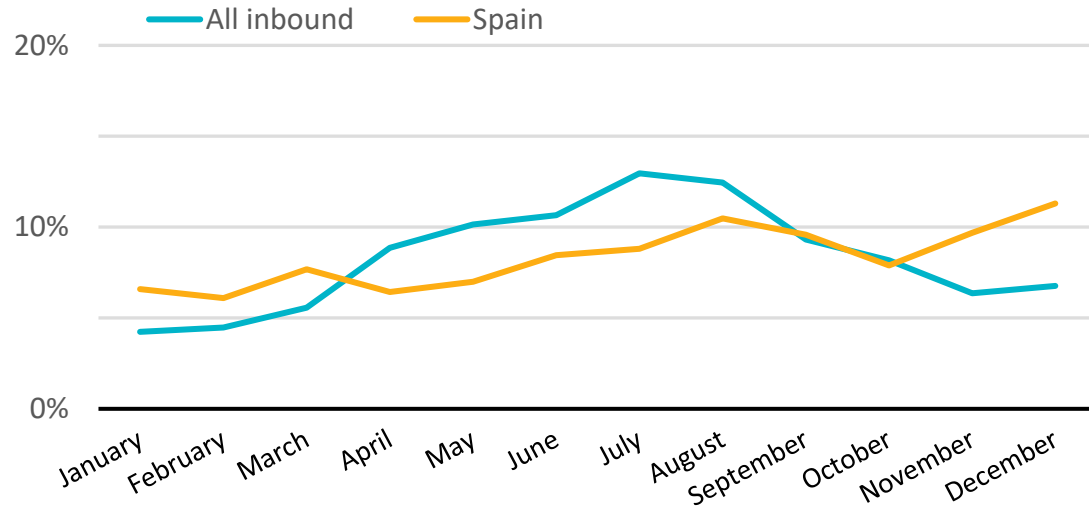


Arrivals in paid accommodation

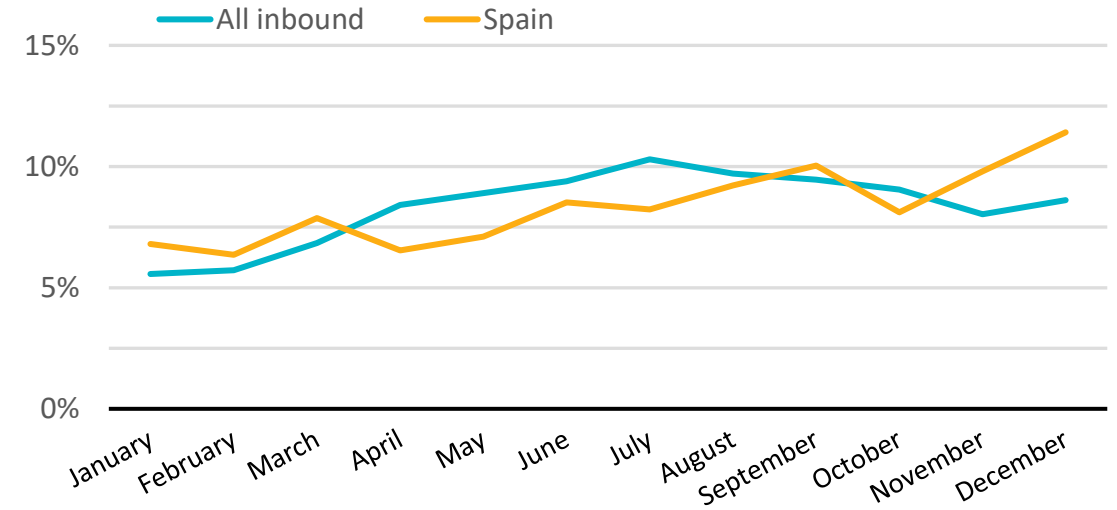
Seasonality



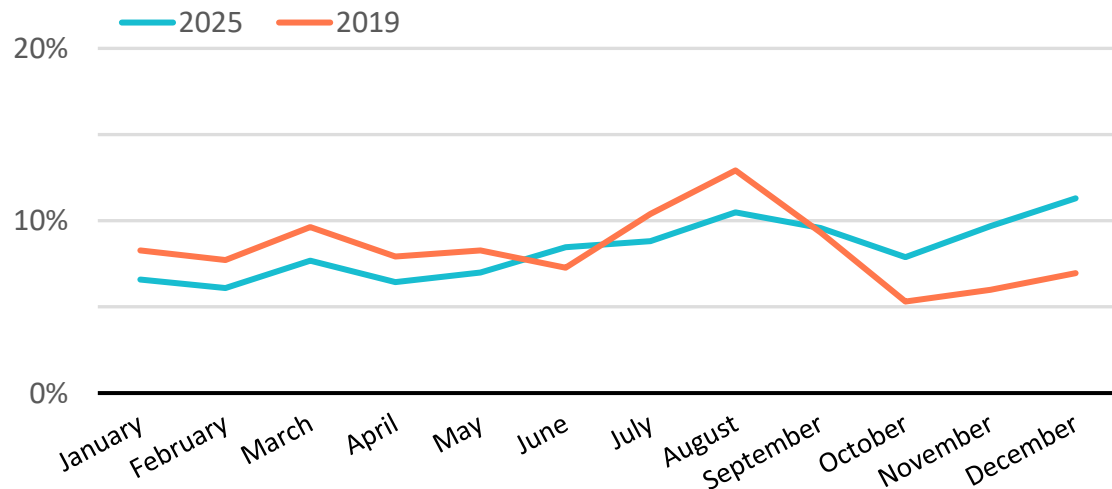
All paid accommodation, 2025



Hotels, 2025



All paid accommodation, arrivals from Spain



Short-term rentals

2025 and 2019-2025



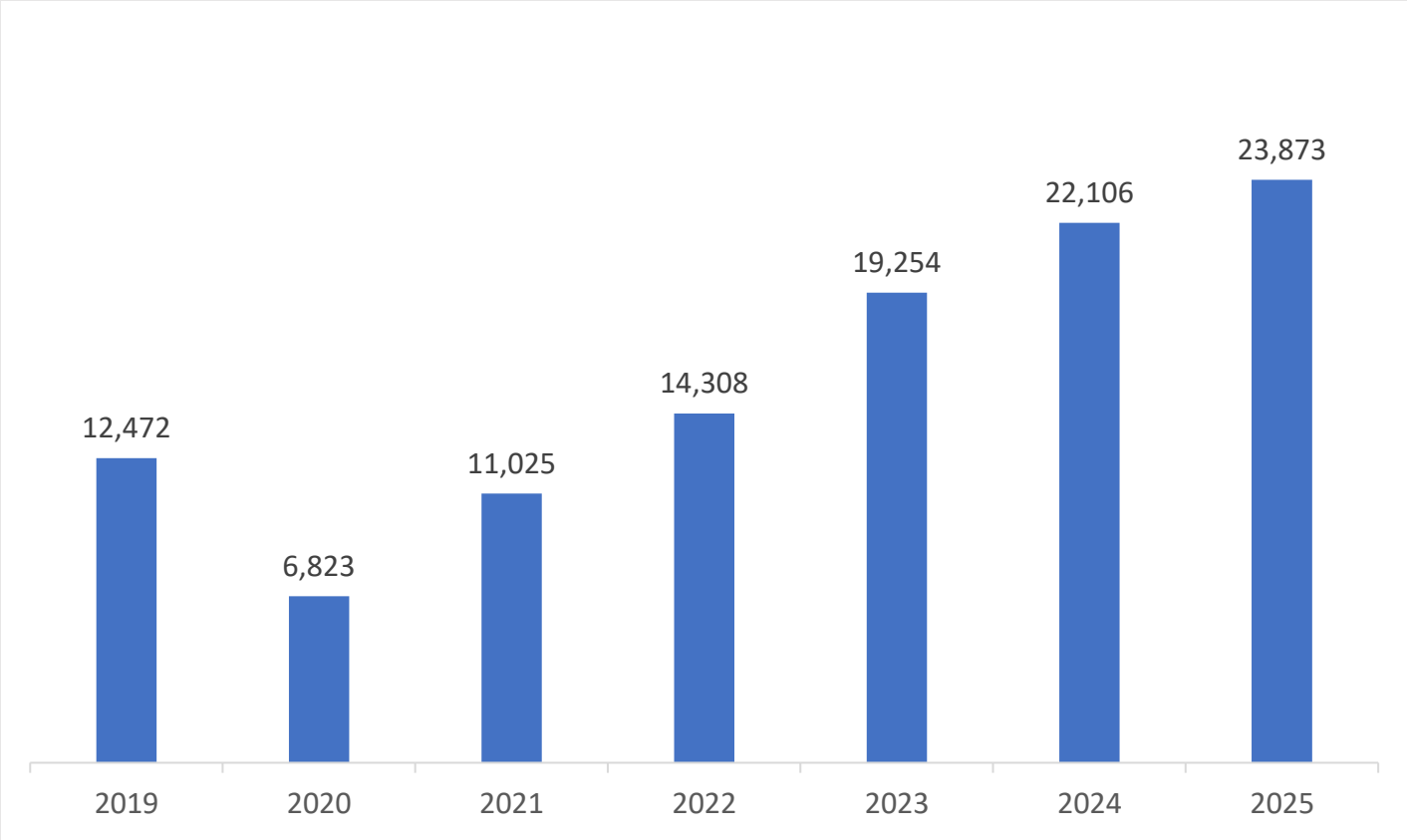
Nights,
Short-term rentals, 2025



+8% (vs. 2024)

+91% (vs. 2019)

Nights,
Short-term rentals, 2019-2025





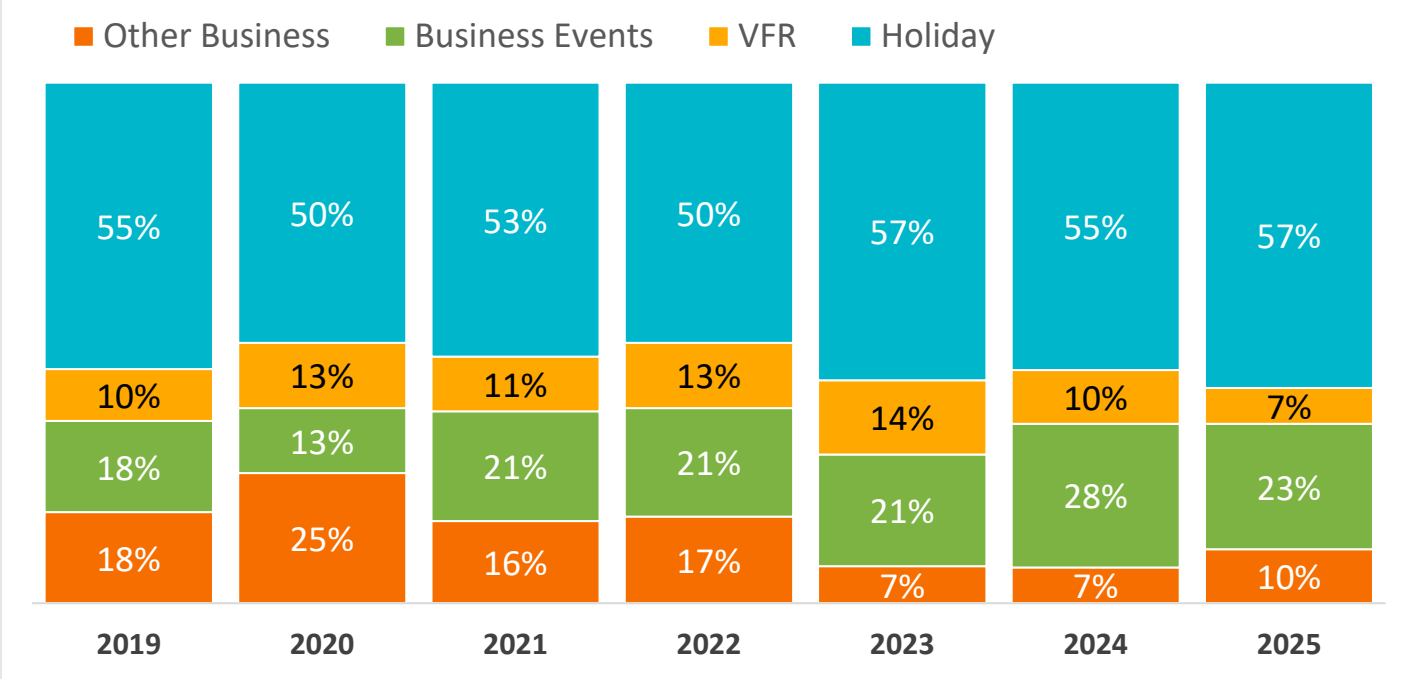
Characteristics of inbound trips

Spanish trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2019-2025

Spanish trips to Luxembourg, 2019-2025



2025

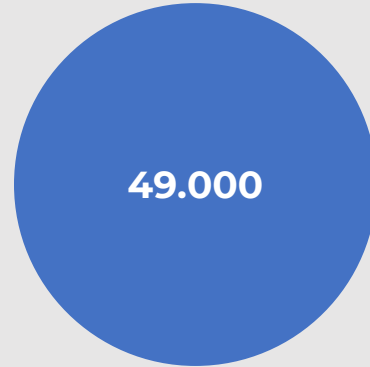
	Spain to Luxembourg	Europe to Luxembourg
Holiday	57%	62%
VFR	7%	12%
Business Events	23%	17%
Other Business	10%	8%

Inbound same-day trips to Luxembourg

2025



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



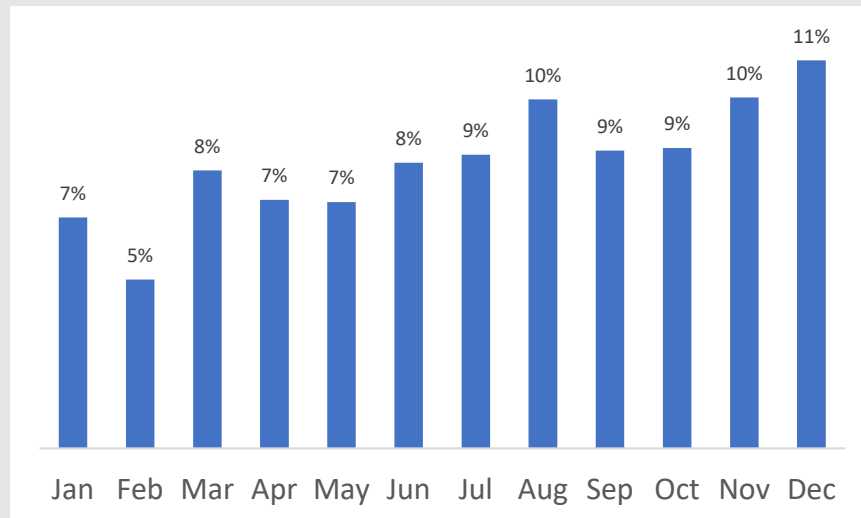
+4% (vs. 2024)

**Average length
of same-day trips**



+0,4 h (vs. 2024)

**Seasonality
% of same-day trips**



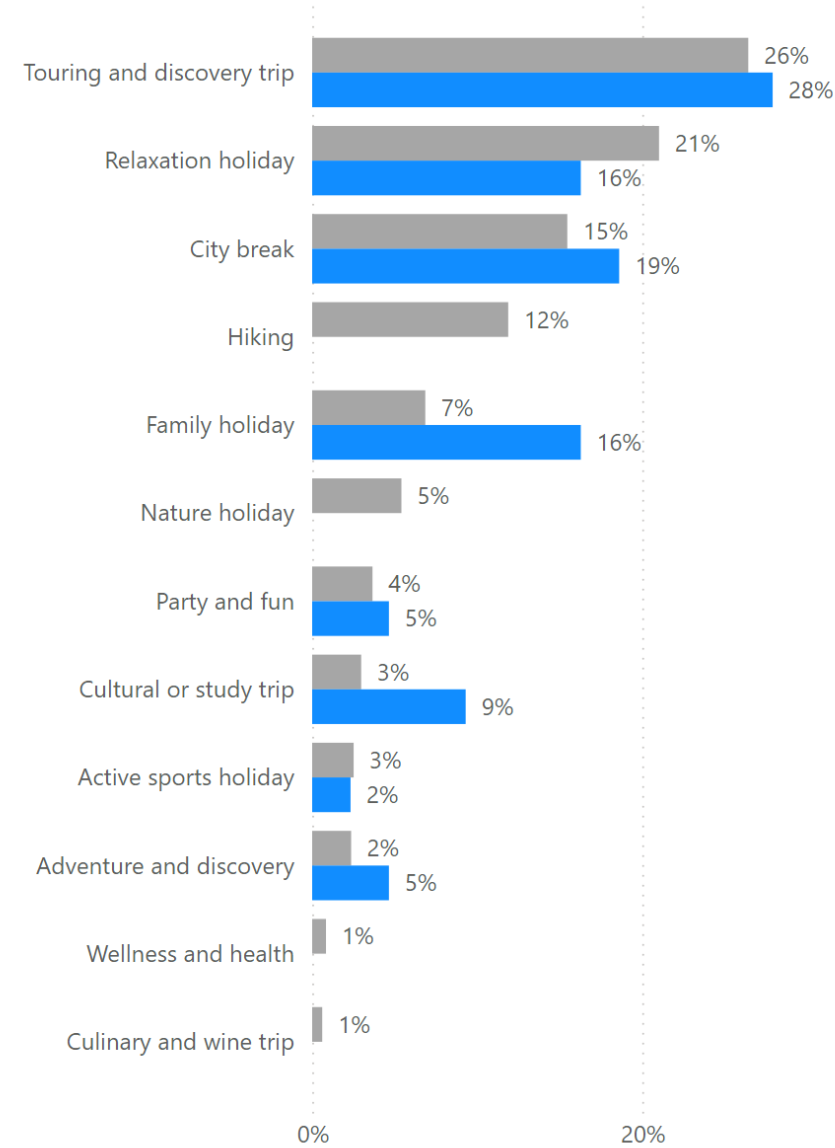


Travel behaviour of inbound leisure visitors

Main holiday types

Leisure overnight visitors, 2024–2025

All inbound Spain

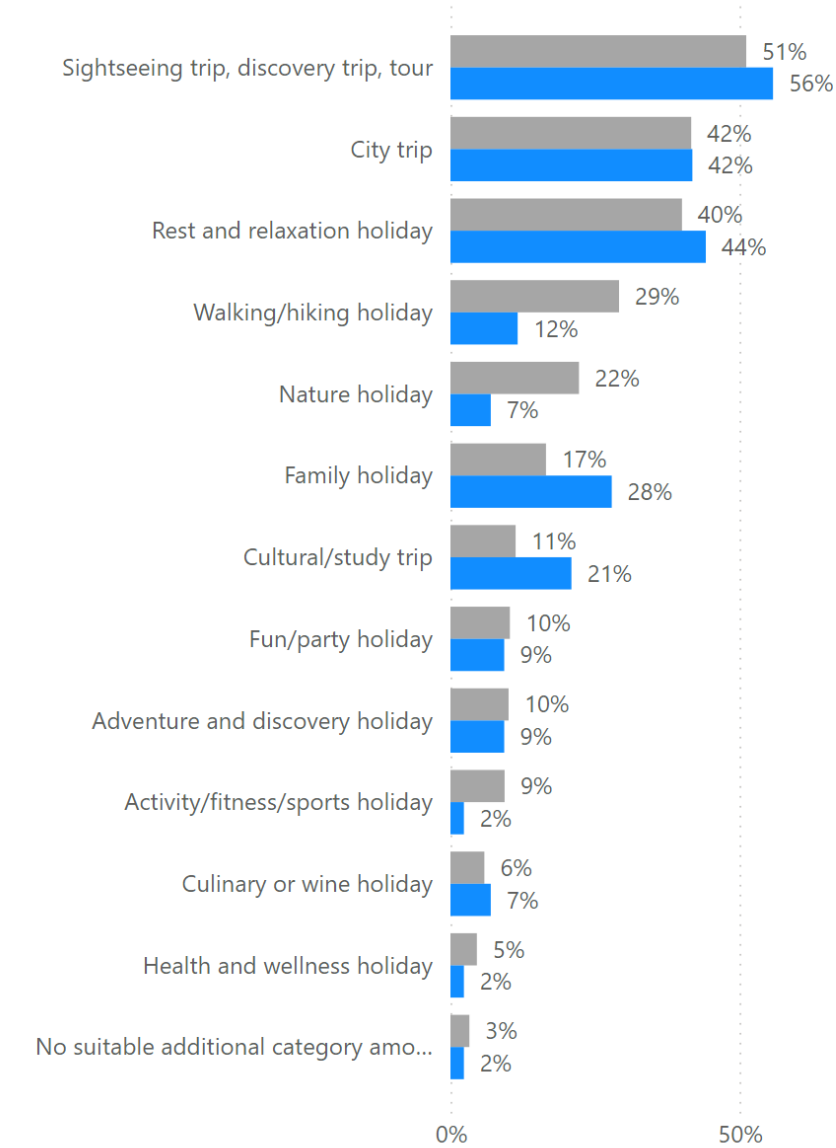


Low N for this question for segment(s): Spain (N=43)

All holiday types

Leisure overnight visitors, 2024–2025

All inbound Spain

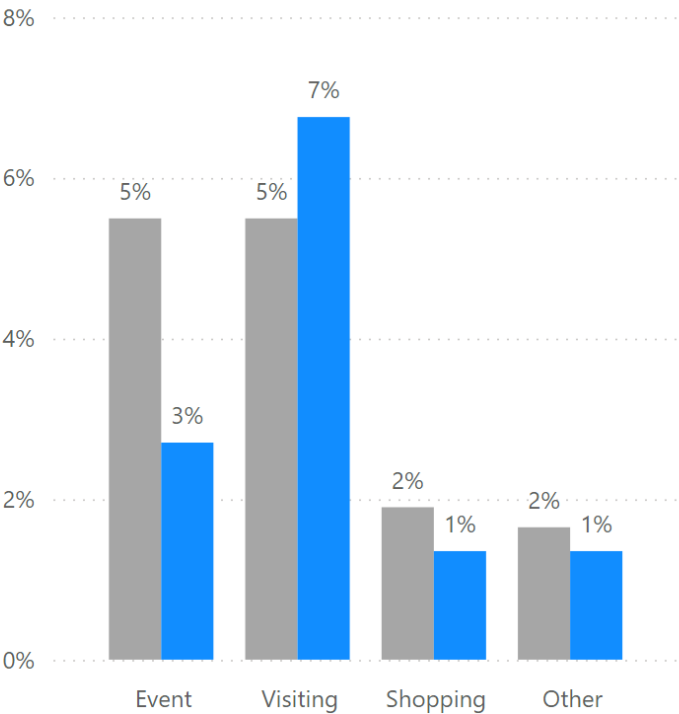


Low N for this question for segment(s): Spain (N=43)

Main purpose of overnight trip (if not holiday)

Leisure overnight visitors, 2024–2025

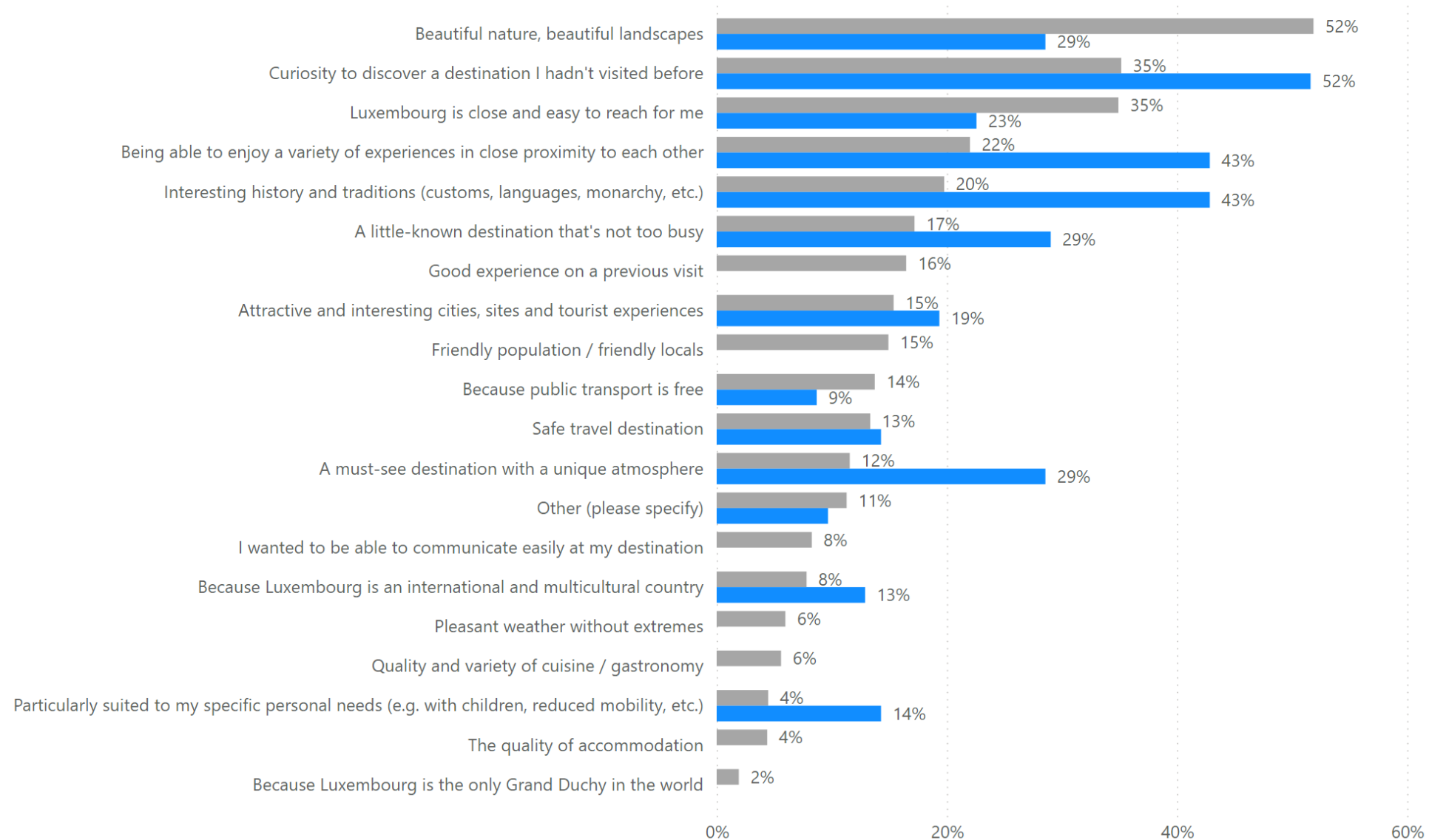
All inbound Spain



Reasons for choosing Luxembourg

Leisure overnight visitors, 2022–2025

● All inbound ● Spain



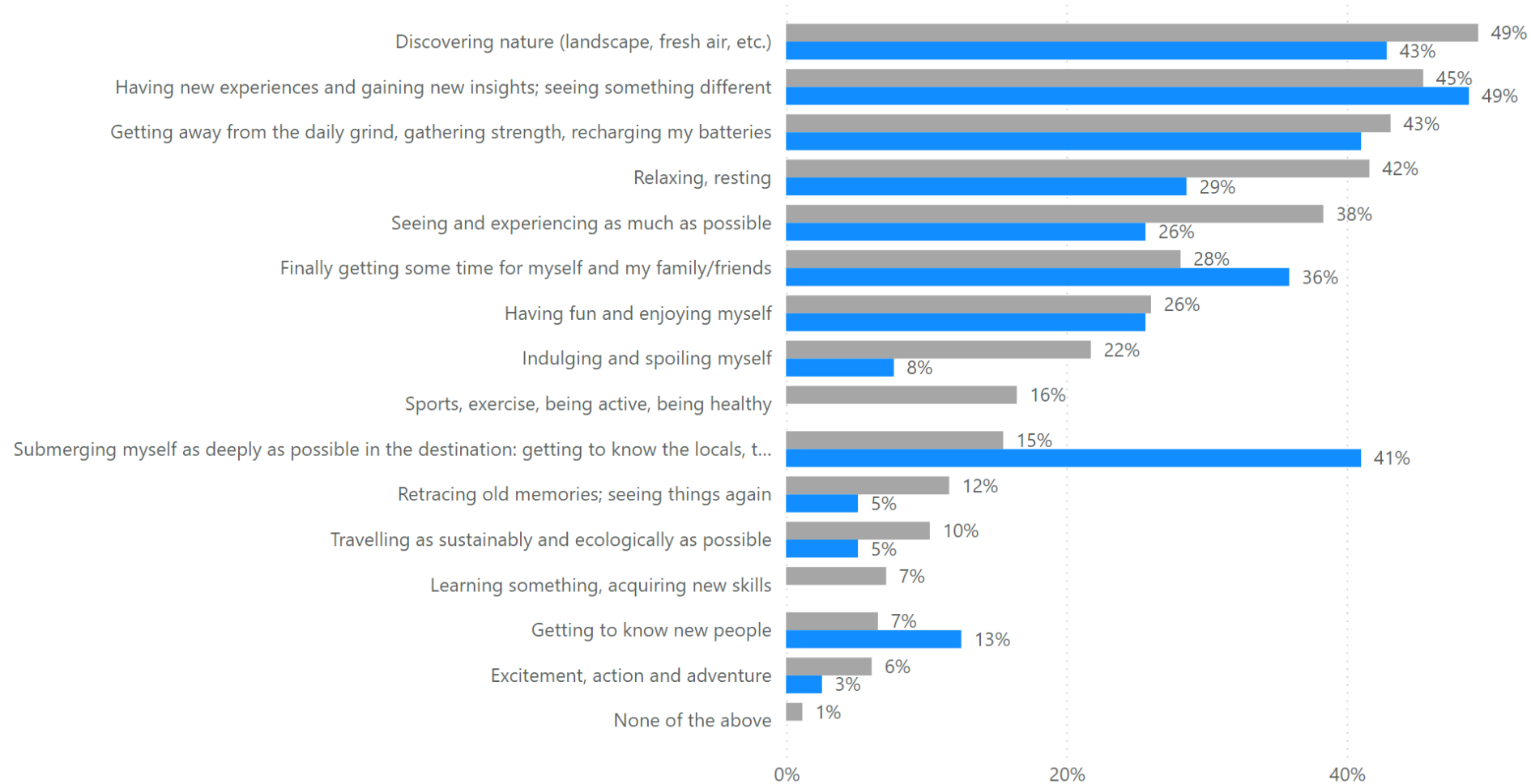
Low N for this question for segment(s): Spain (N=31)



Travel Motives

Leisure overnight visitors, 2022–2025

● All inbound ● Spain

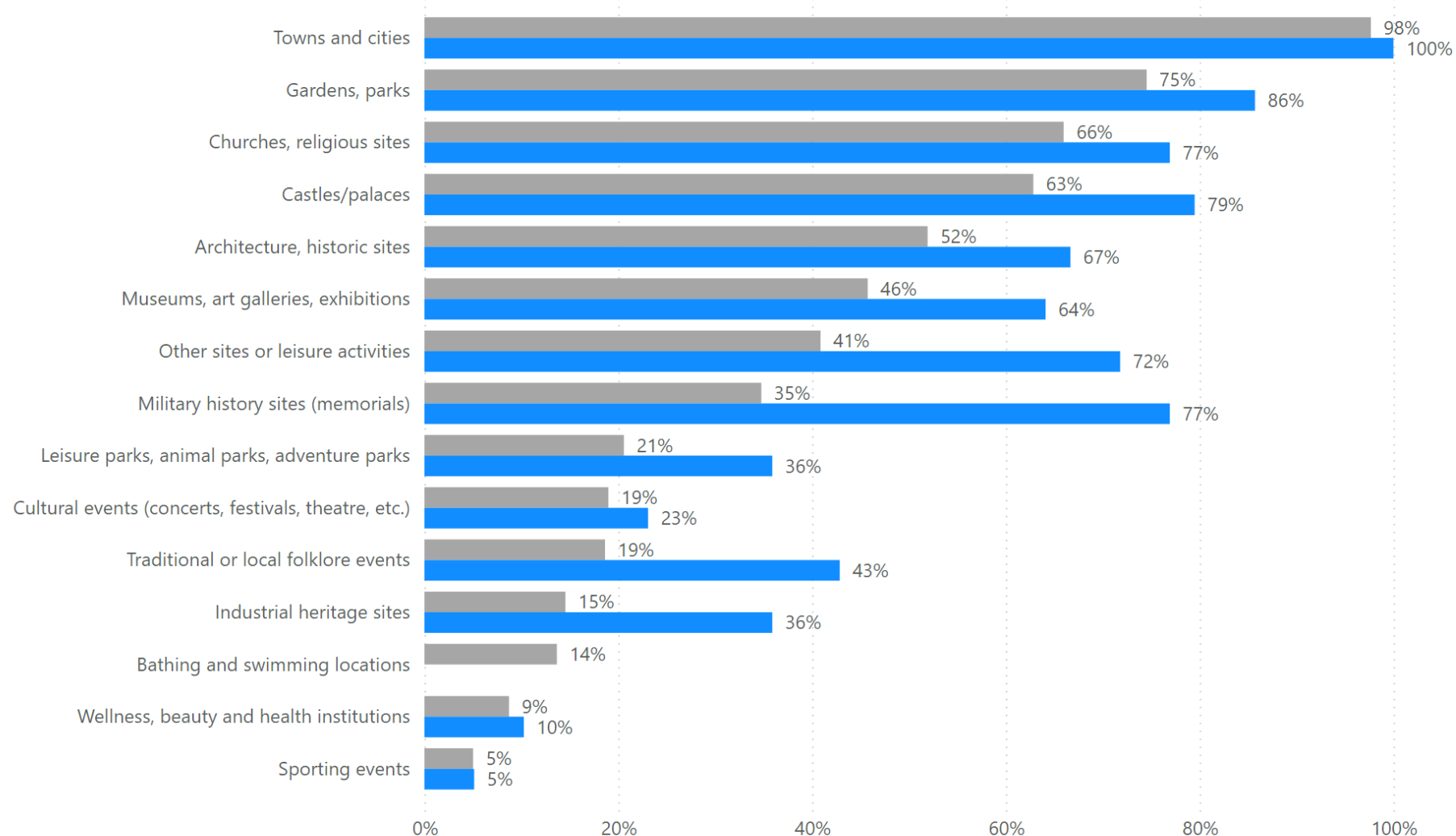


Low N for this question for segment(s): Spain (N=39)

Places visited

Leisure overnight visitors, 2022–2025

● All inbound ● Spain

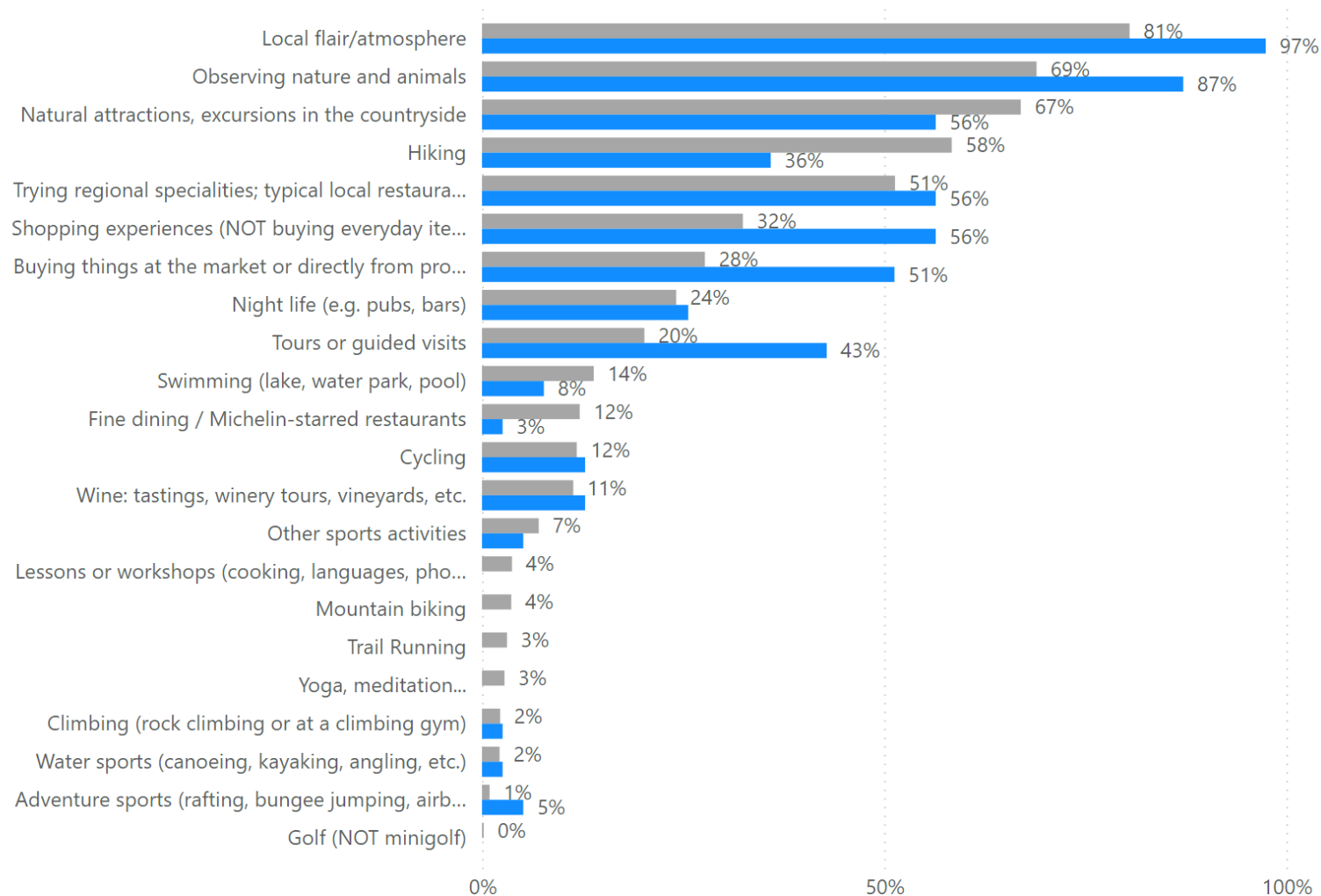


Low N for this question for segment(s): Spain (N=39)

Activities (sporting and non-sporting)

Leisure overnight visitors, 2022–2025

● All inbound ● Spain



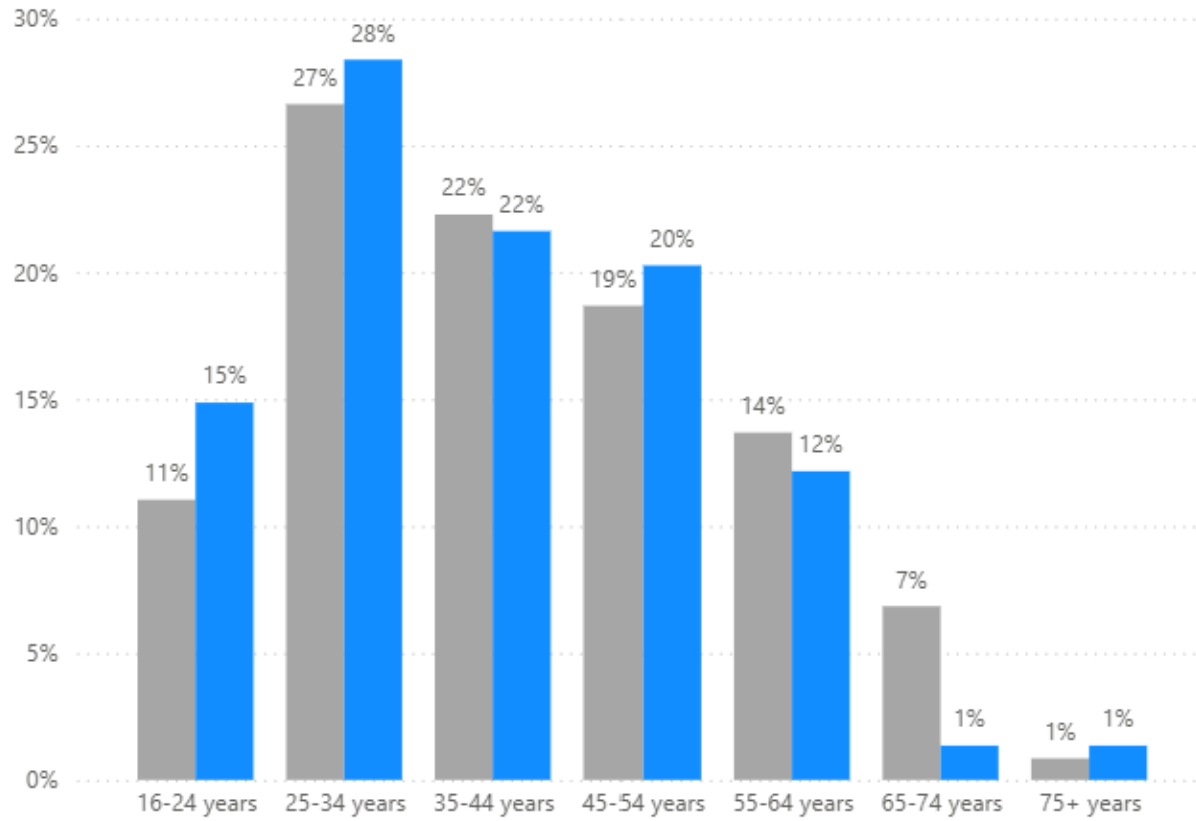
Low N for this question for segment(s): Spain (N=39)



Age

Leisure overnight visitors, 2024–2025

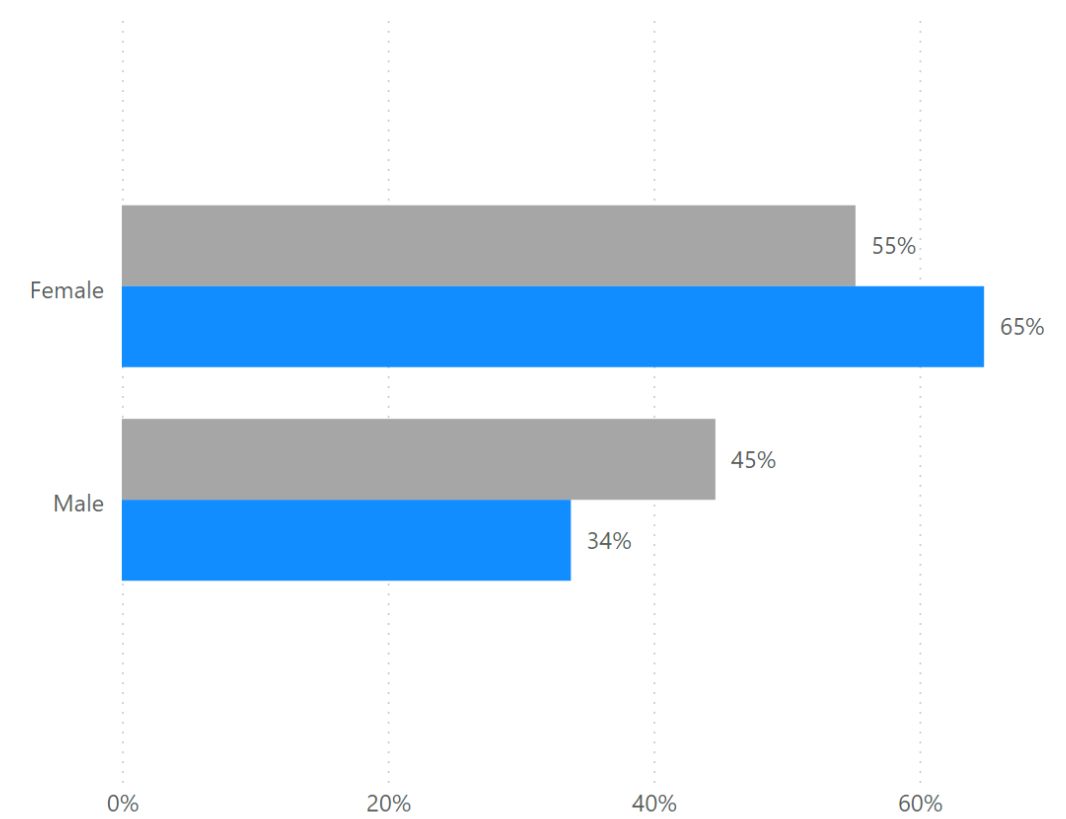
● All inbound ● Spain



Gender

Leisure overnight visitors, 2024–2025

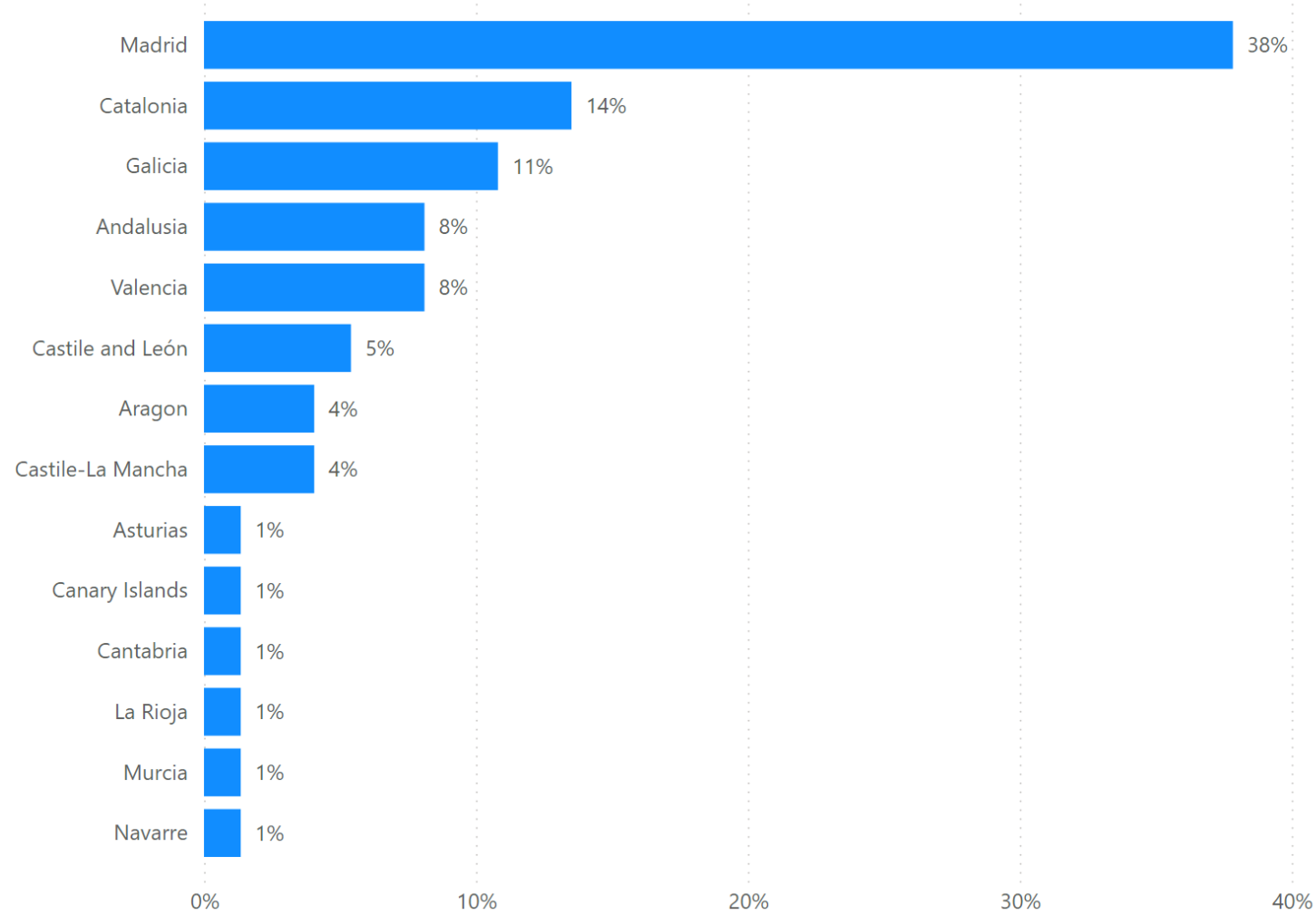
● All inbound ● Spain





Region of origin
Leisure overnight visitors, 2024–2025

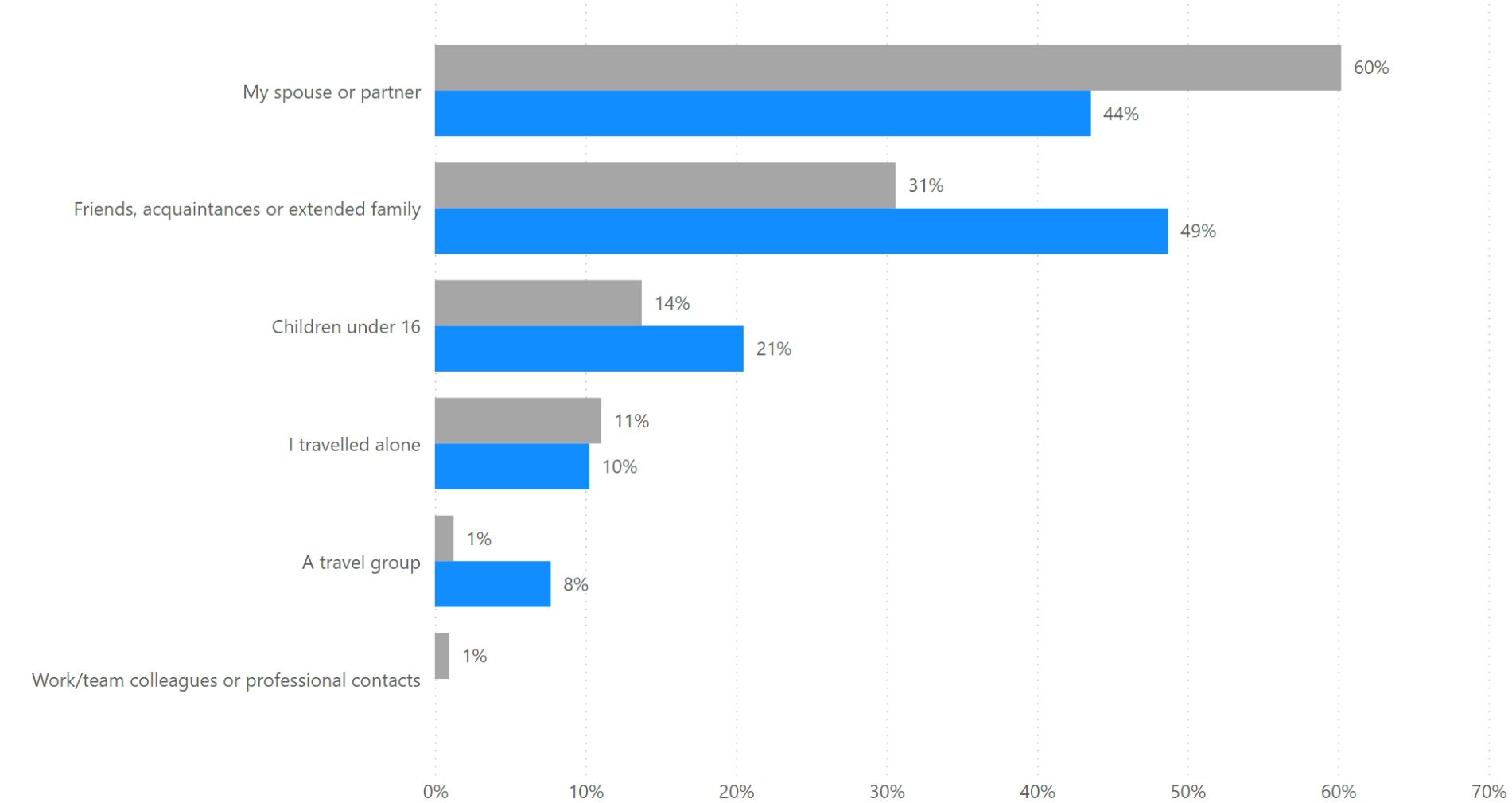
● Spain





Travel party
Leisure overnight visitors, 2022–2025

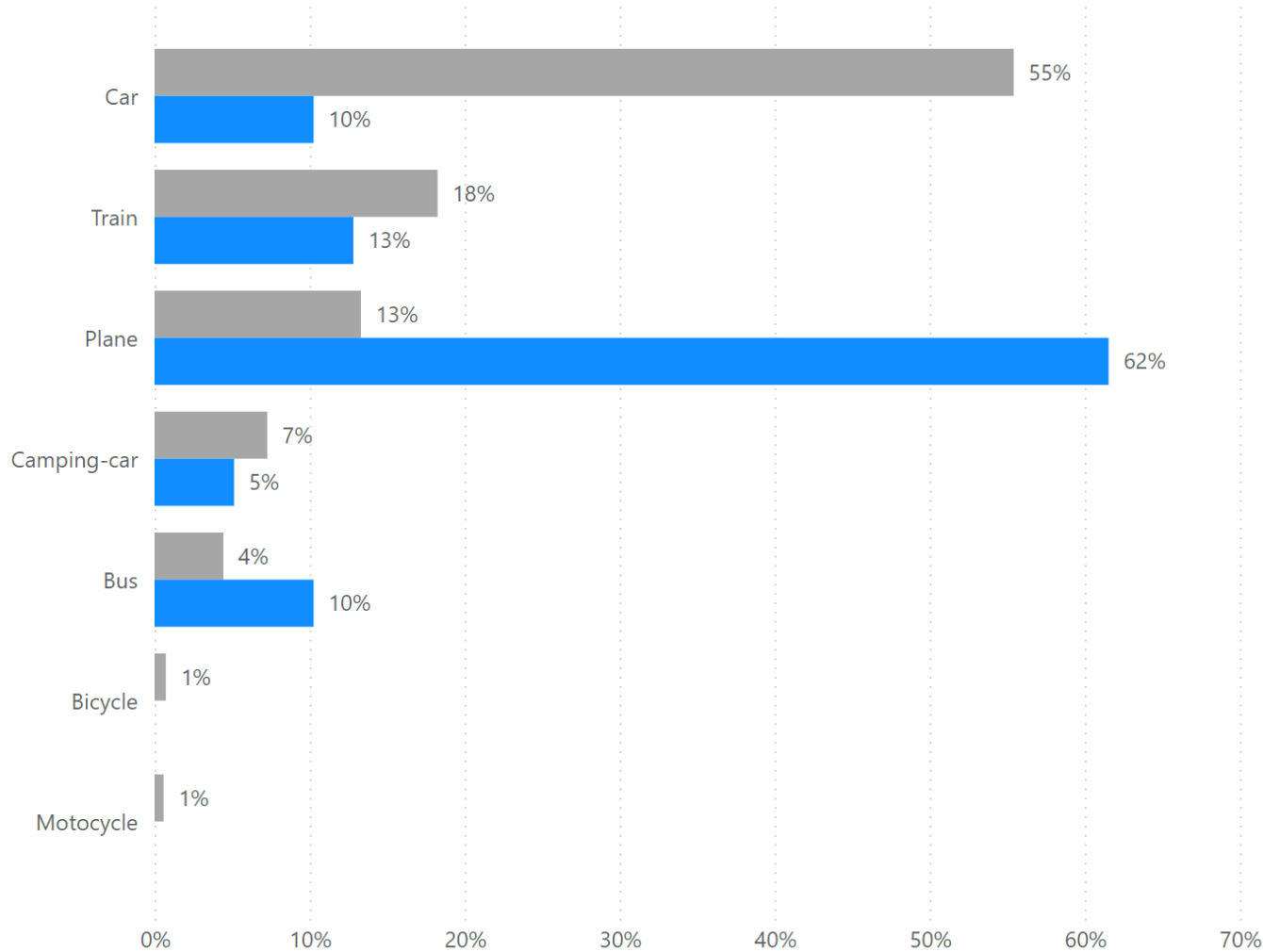
● All inbound ● Spain



Low N for this question for segment(s): Spain (N=39)

Transport to destination
Leisure overnight visitors, 2022–2025

● All inbound ● Spain



Low N for this question for segment(s): Spain (N=39)



First-time visitors
Leisure overnight visitors, 2024–2025

62%

All inbound

84%

Spain

Visitors spending nights in
Luxembourg and abroad
during same trip

Leisure overnight visitors, 2024–2025

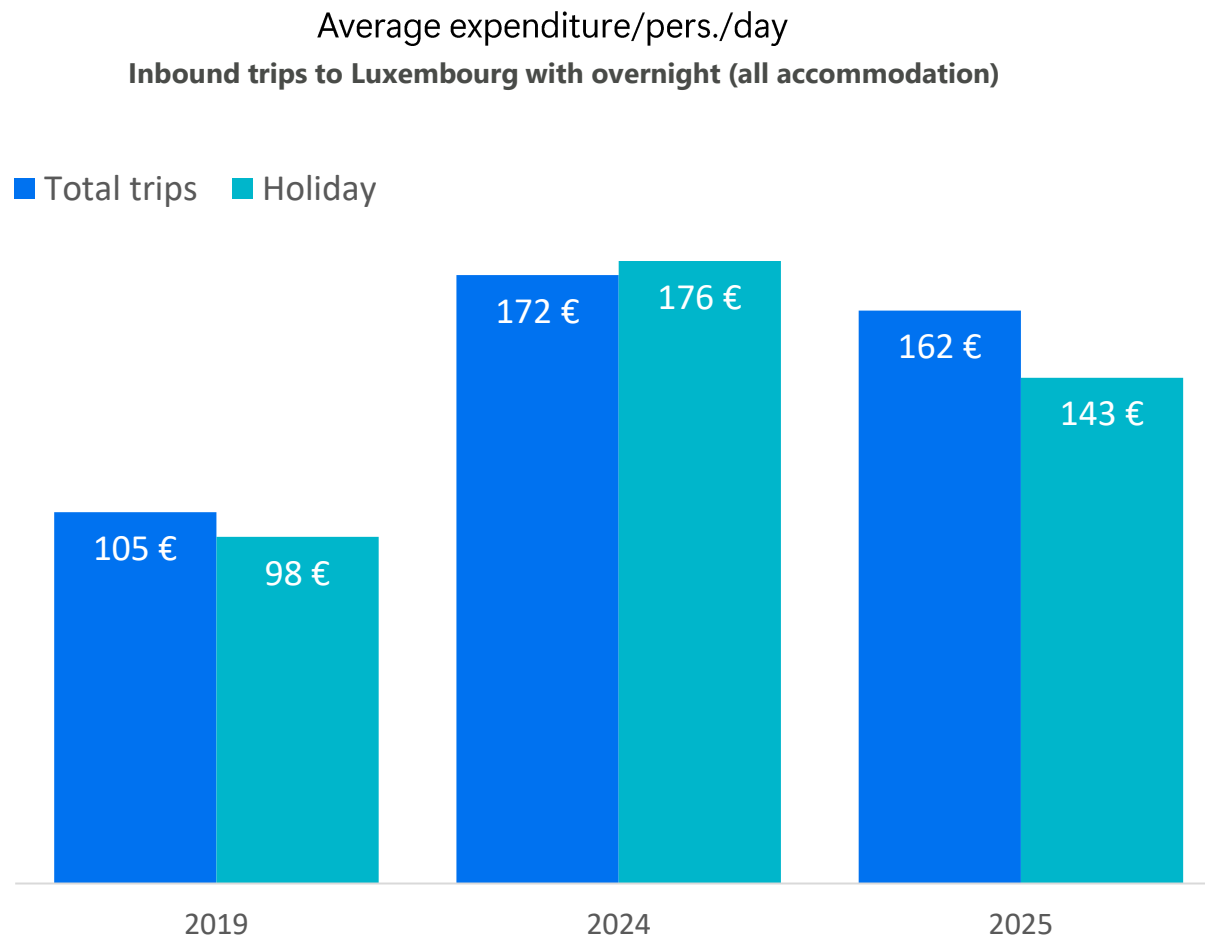
38%

All inbound

46%

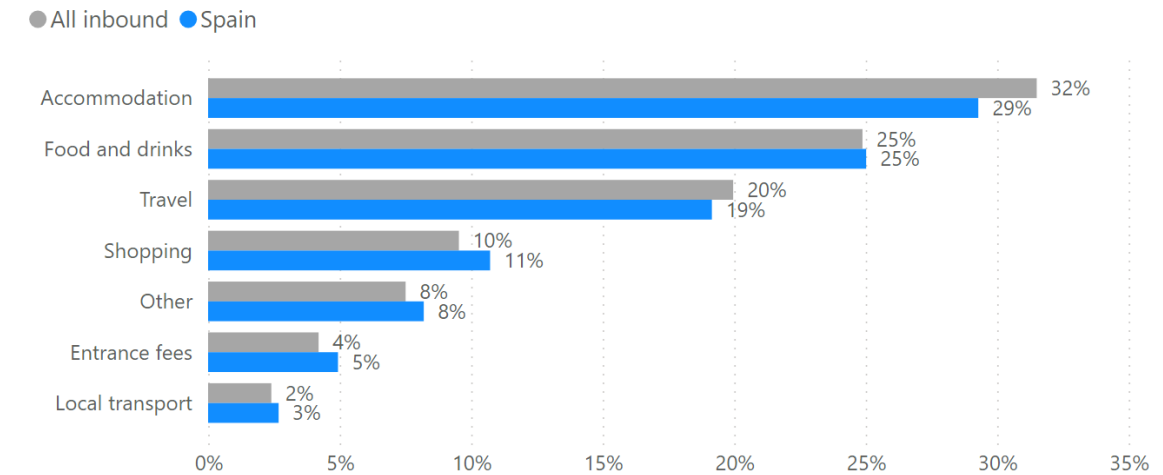
Spain

Low N for this question for segment(s): Spain (N=39)



Spending categories

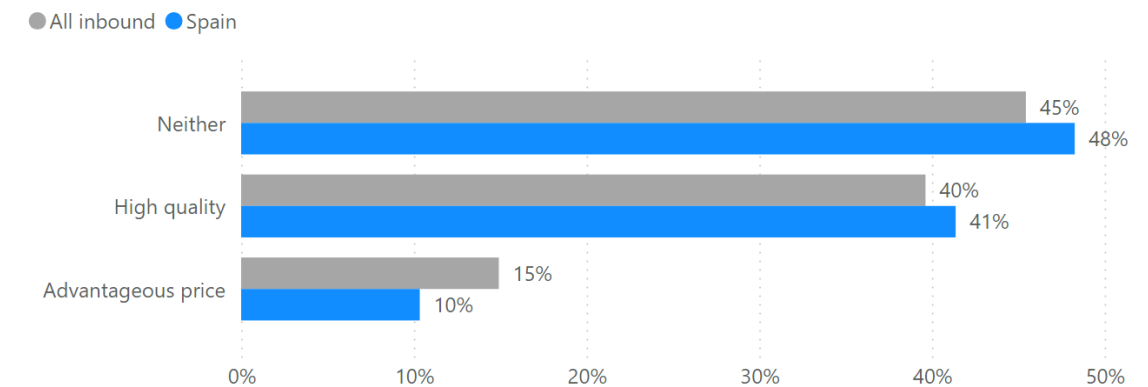
Leisure overnight visitors, 2022–2025



Low N for this question for segment(s): Spain (N=29)

Quality vs. price orientation

Leisure overnight visitors, 2023–2025



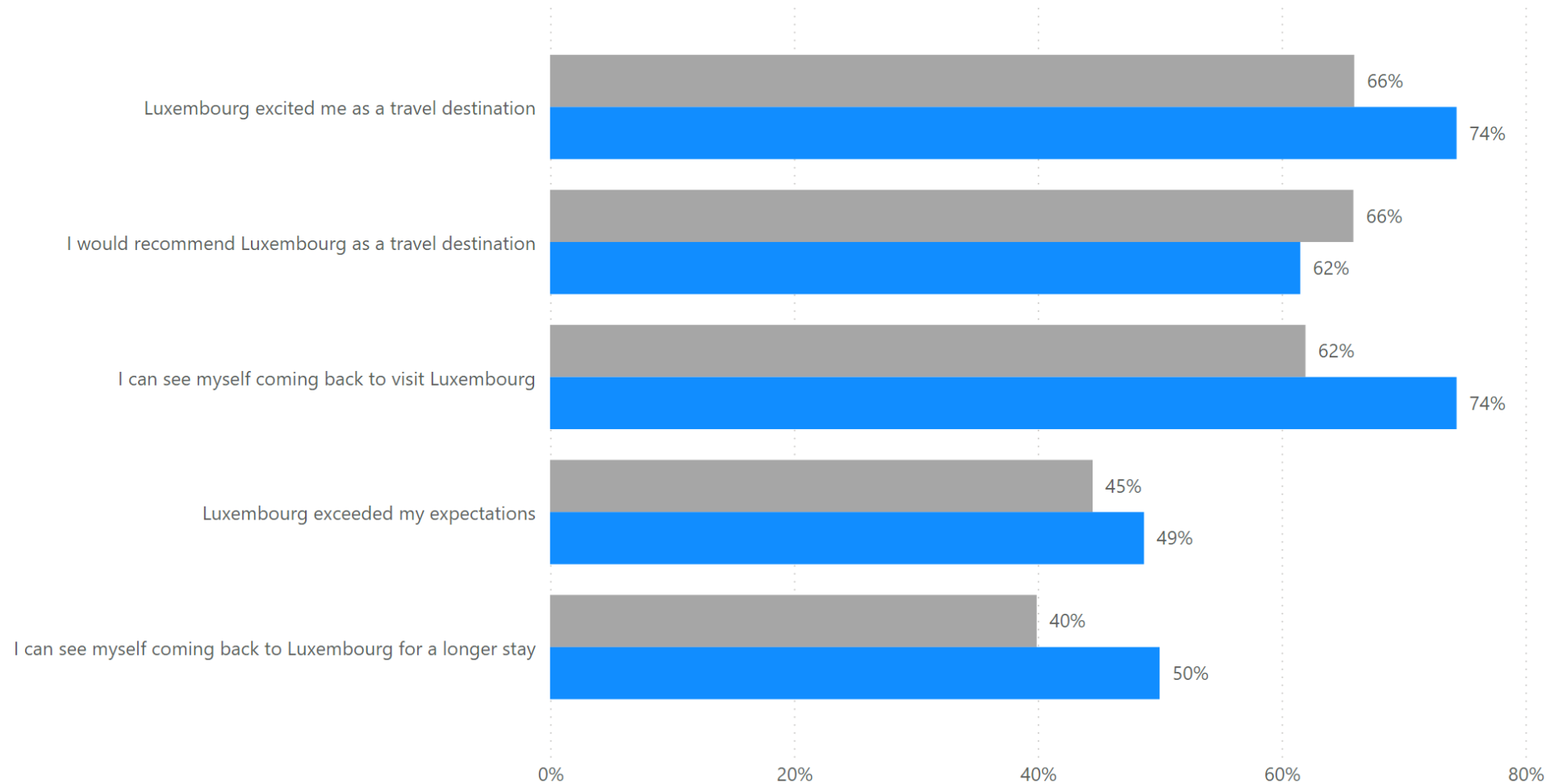
Low N for this question for segment(s): Spain (N=29)



Overall satisfaction - % "strongly agree"

Leisure overnight visitors, 2022–2025

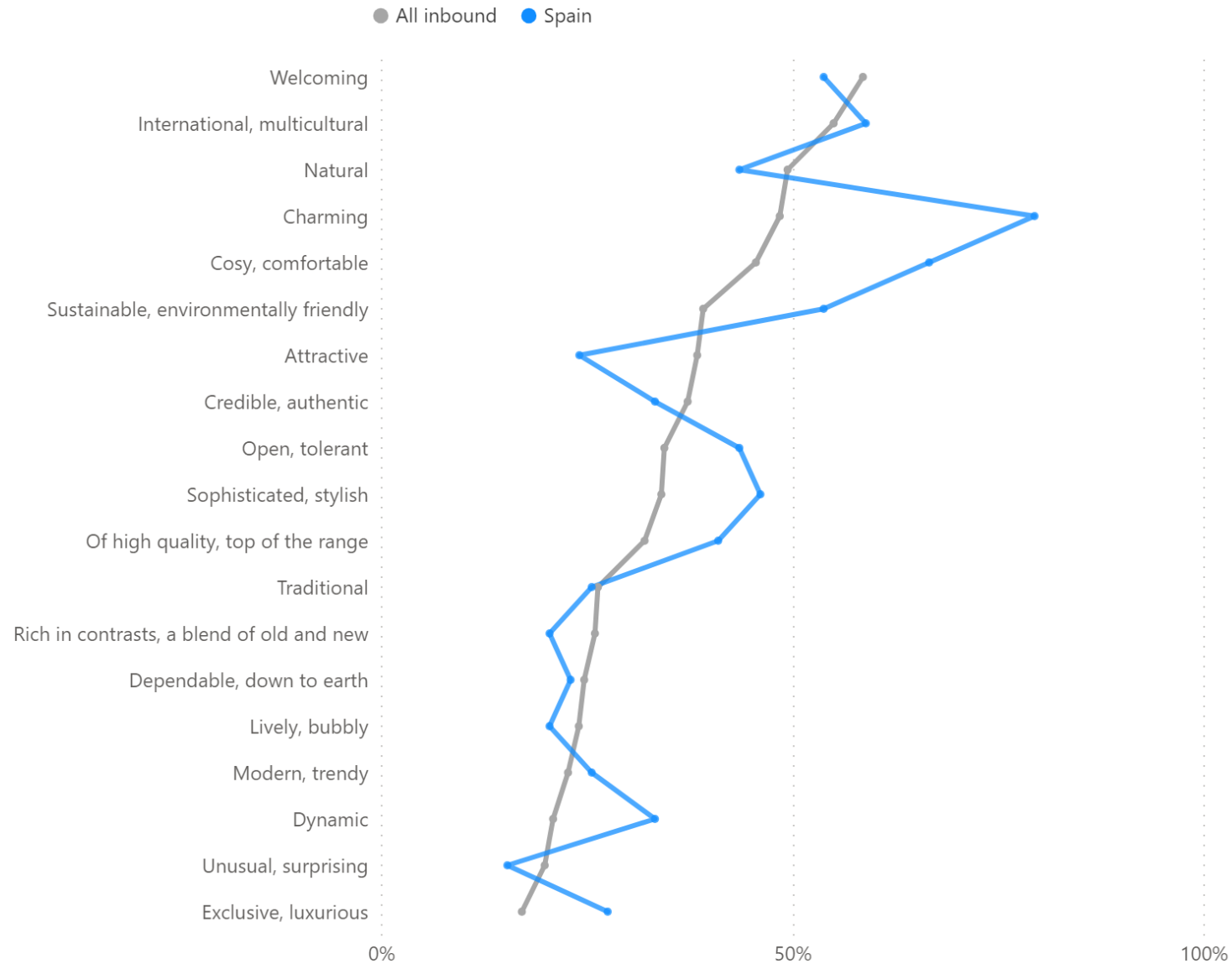
● All inbound ● Spain



Low N for this question for segment(s): Spain (N=39)

Brand features

Leisure overnight visitors, 2022–2025

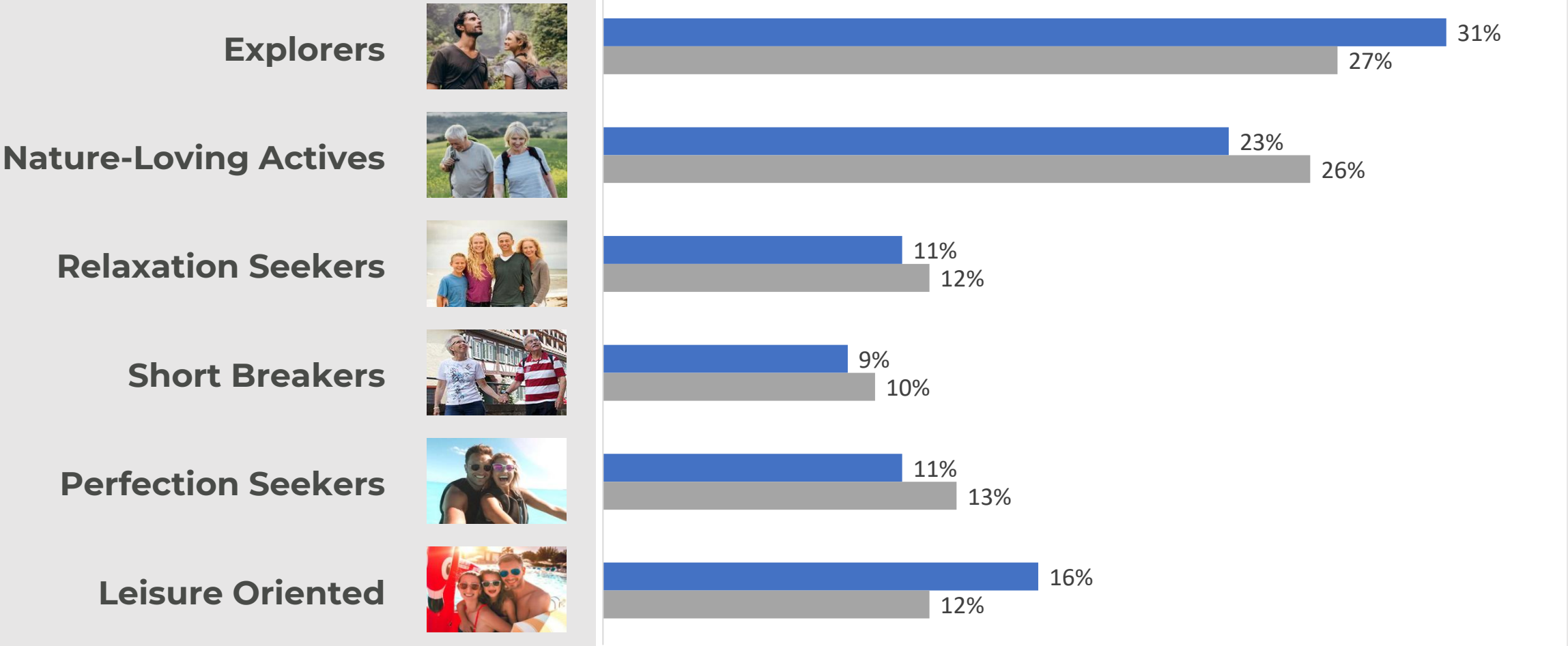
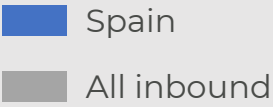


Low N for this question for segment(s): Spain (N=39)



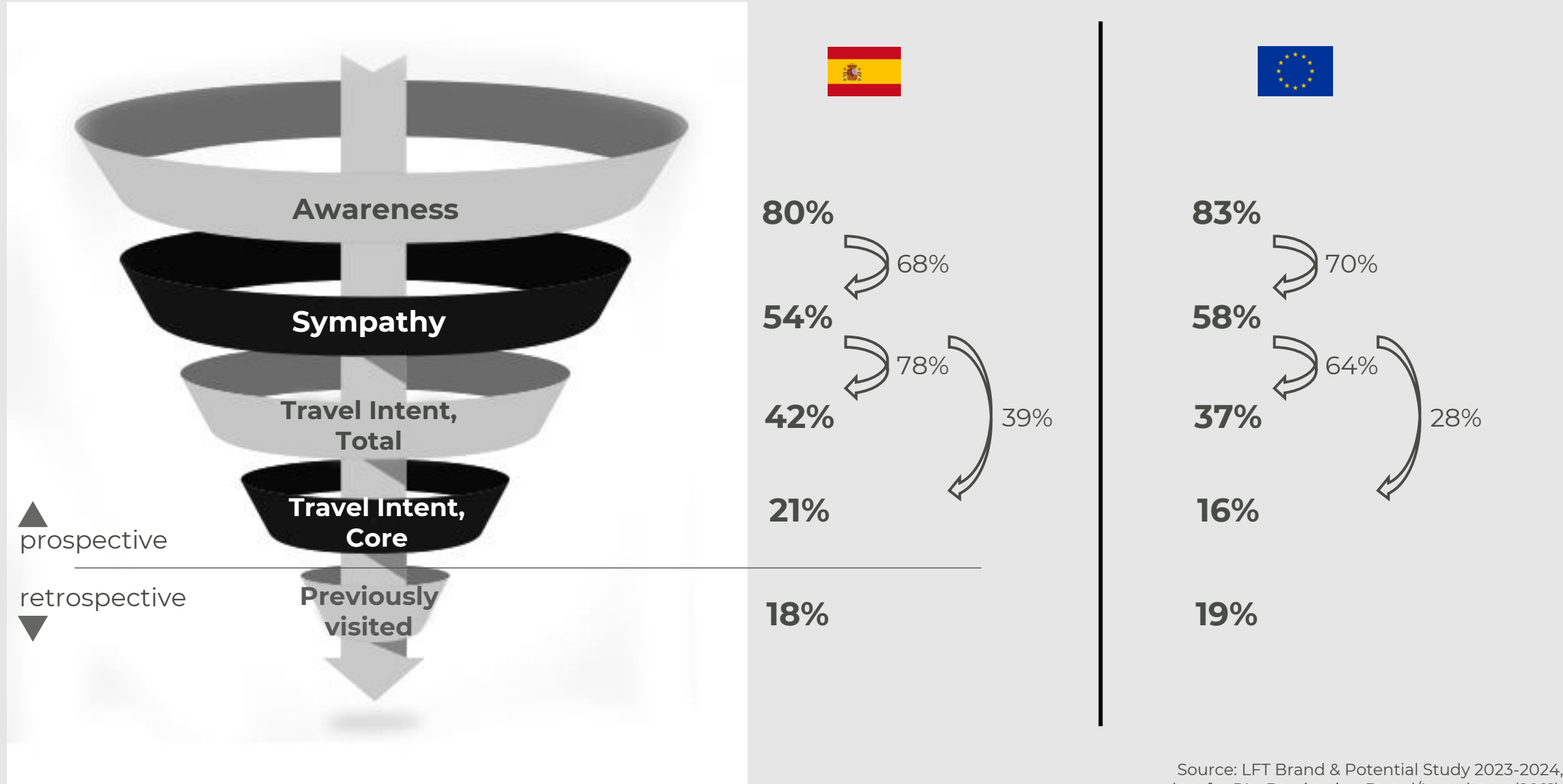
Target segments, Brand & Growth Potential

LFT Target Segments



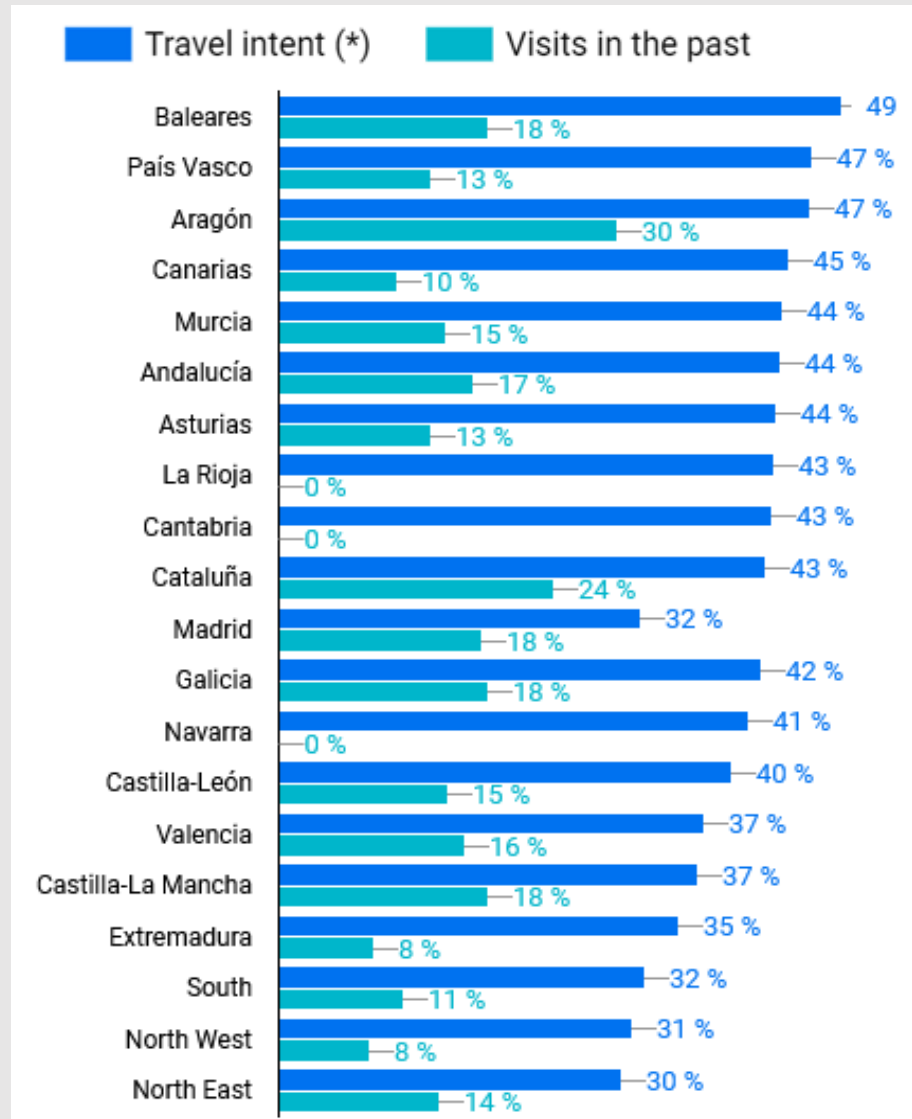
Destination Luxembourg - Brand Funnel 2024

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



Regional origin 2024

Past visitors and future potential



General theme interest (*)



Theme				Theme (continued)			
	Rank	Rank	% interested		Rank	Rank	% interested
Culinary	2	1	74%	Nightlife (**)	20	20	59%
Sightseeing	4	2	74%	Exchanging with locals	13	21	59%
City	5	3	74%	Events	16	22	56%
Architecture/townscapes	7	4	73%	Hiking	17	23	55%
Nature	3	5	73%	Countryside	22	24	53%
Resting/Relaxation	1	6	72%	Wine	21	25	49%
History/Unesco	10	7	72%	Shopping	23	26	48%
Immersive travel	6	8	72%	Active-sports	27	27	48%
Culture	11	9	71%	Adventure/action	19	28	47%
Castles	9	10	71%	Film locations	30	29	46%
Family	12	11	70%	Wellness	25	30	44%
Gardens/parks		12	69%	Remembrance	26	31	44%
Fun/entertainment	8	13	67%	Luxury	24	32	42%
Trad./folk festivals/mkts		14	65%	Industrial heritage	28	33	41%
Bathing (in lakes, waters)		15	65%	Camping	29	34	39%
Learning/new skills	14	16	63%	Water sports		35	37%
Travelling by train	18	17	62%	MTB	32	36	31%
Sustainability	15	18	60%	Motorcycling	33	37	27%
Road trips, scenic drives		19	60%	Cycling	31	38	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).

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

Luxembourg's Theme Competence (*)



Theme			
	Rank	Rank	% agreeing
City	1	1	42%
Culture	6	2	39%
Castles	7	3	37%
Resting/Relaxation	2	4	37%
Architecture/townscapes	4	5	36%
Nature	5	6	36%
Family	8	7	36%
Culinary	3	8	34%
Gardens, parks		9	33%
History/Unesco	12	10	32%
Luxury	9	11	30%
Nightlife (**)	14	12	28%
Events, cultural		13	27%
Fun/entertainment	13	14	26%
Shopping	10	15	26%
Road trips, scenic drives		16	25%
Bathing in lakes, waters		17	25%
Sustainability	18	18	22%
Wine	15	19	21%
Countryside	17	20	20%
Action, adventure	22	21	20%
Remembrance	26	22	20%
Hiking	11	23	20%
Wellness	16	24	19%
Industrial heritage	24	25	18%
Active-sports	21	26	17%
Camping	19	27	17%
MTB	25	28	16%
Events, sport		29	13%
Water sports		30	13%
Cycling	20	31	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.

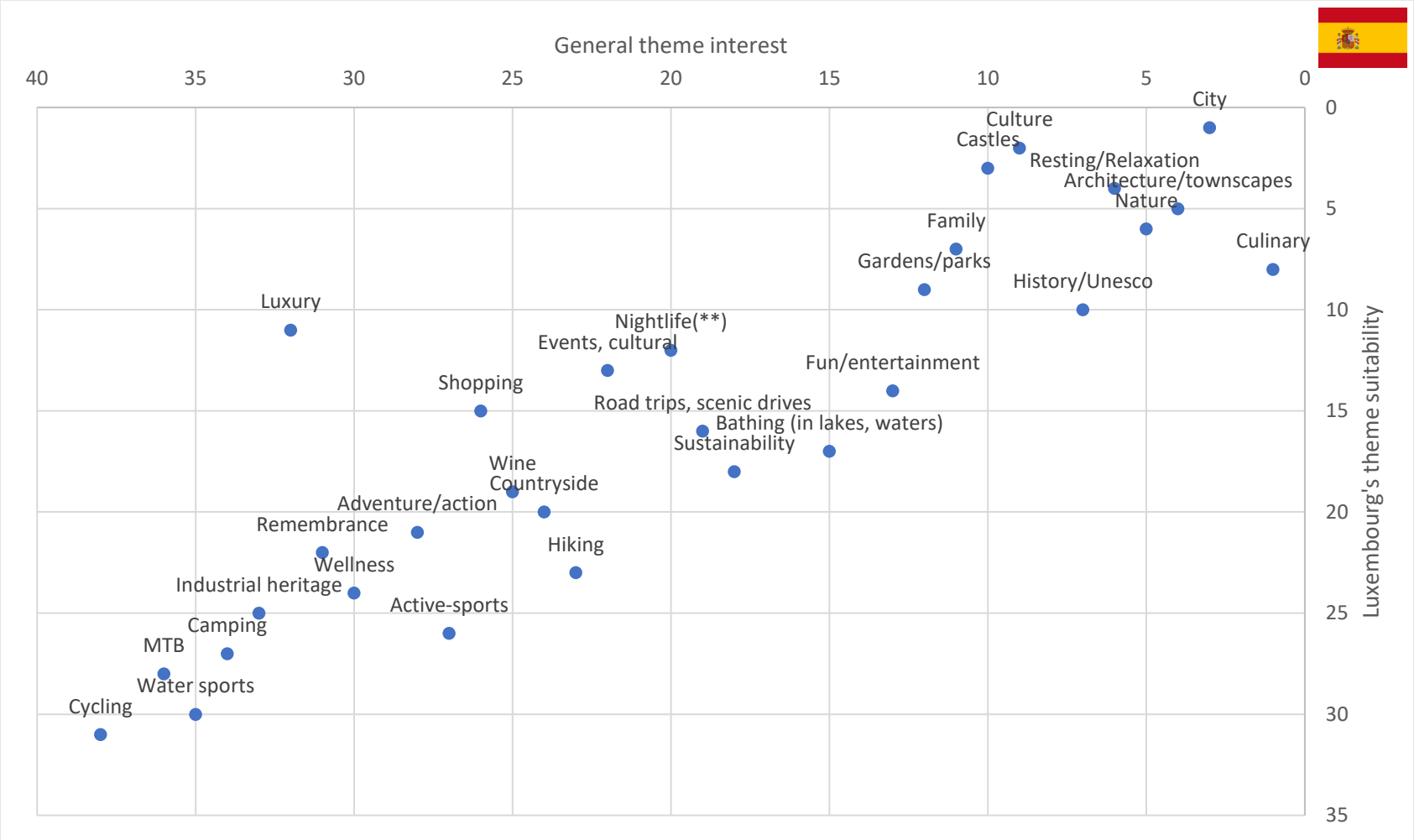
(**) Nightlife (festivals & events), urban lifestyle, lively places (trendy or alternative quarters)

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

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	47%
clean	2	2	45%
of high quality	3	3	42%
attractive, appealing	7	4	38%
open-minded, tolerant, international	6	5	34%
authentic, real	5	6	34%
exclusive, luxurious	8	7	32%
surprising	11	8	31%
welcoming, hospitable	4	9	31%
dynamic, modern	9	10	29%
unique		11	29%
varied, diversified	12	12	27%
lively, trendy	13	13	26%
sustainable	15	14	25%
not overcrowded / insider tip	14	15	25%
service oriented	10	16	22%
affordable	16	17	16%

(*) 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



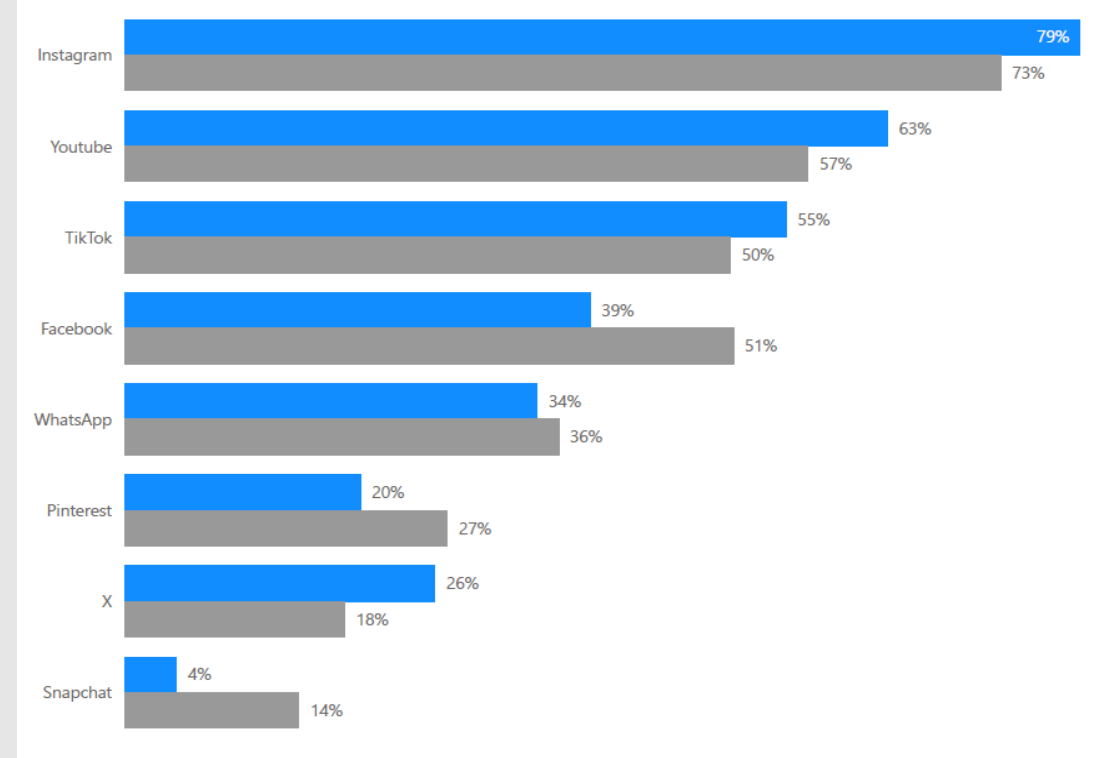
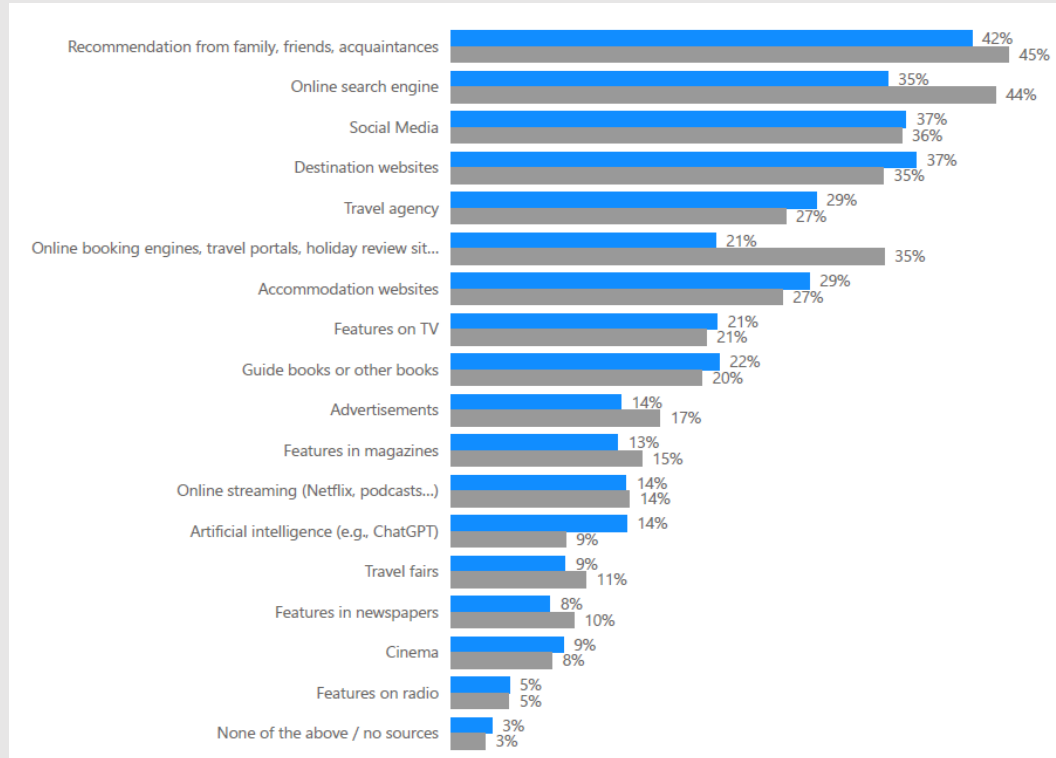
Trip organisation and preferences (1)

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



Spain
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)

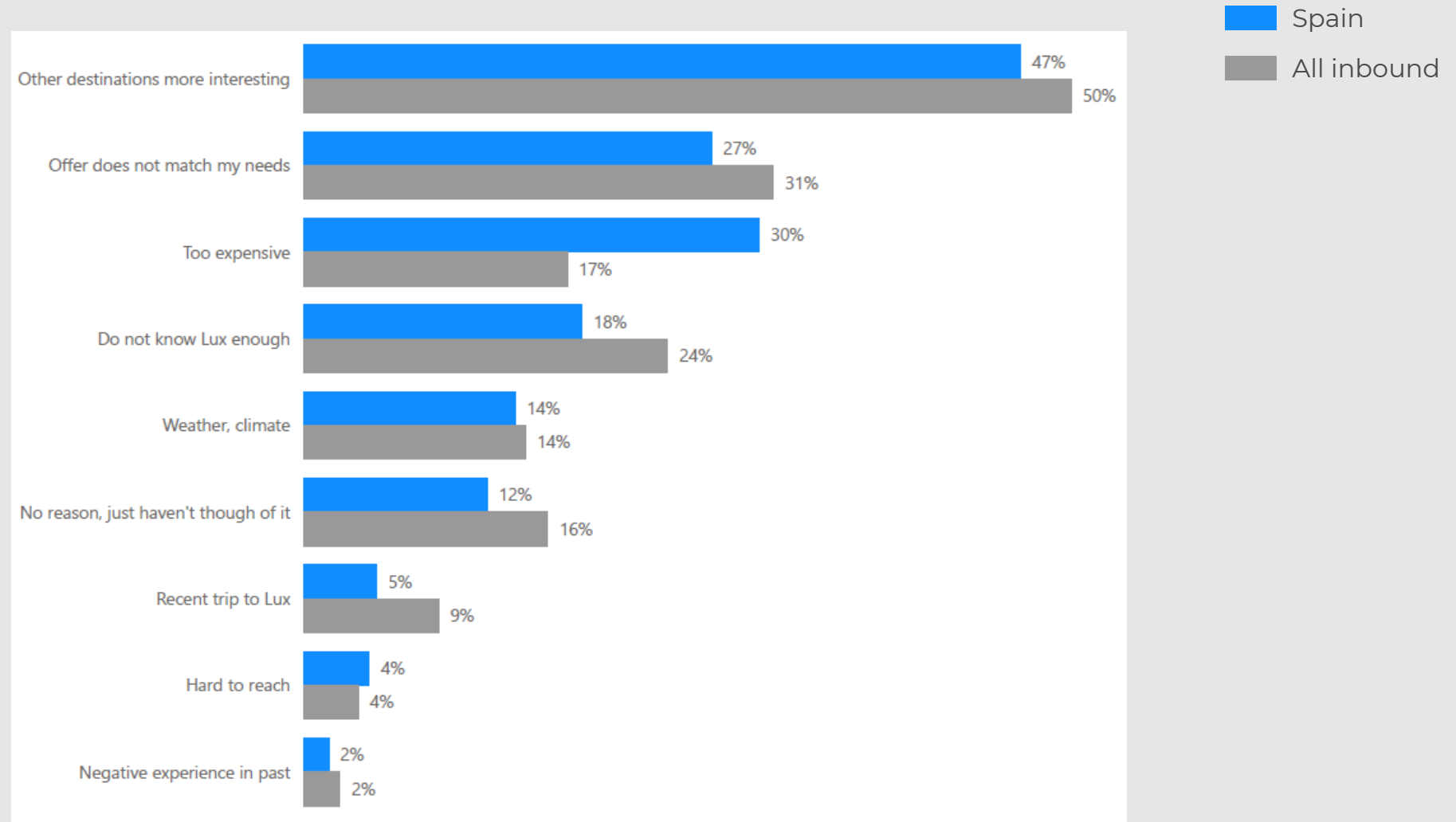


Trip organisation and preferences (2)

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



Reasons for not considering Luxembourg as a destination

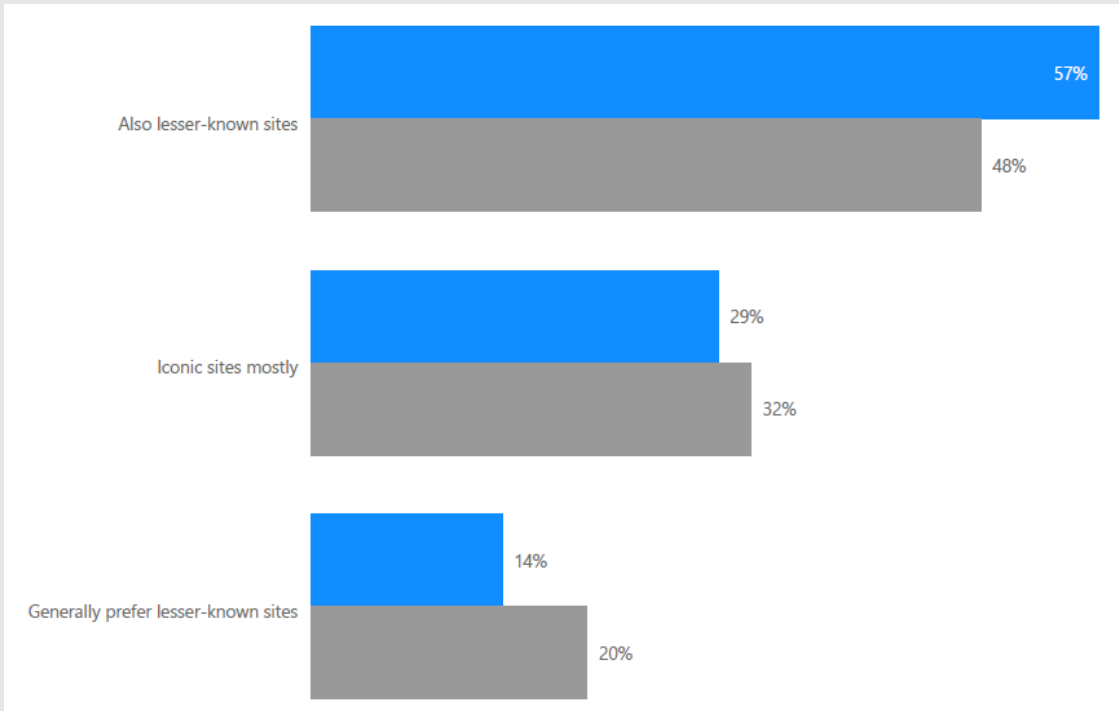


Trip organisation and preference (3)

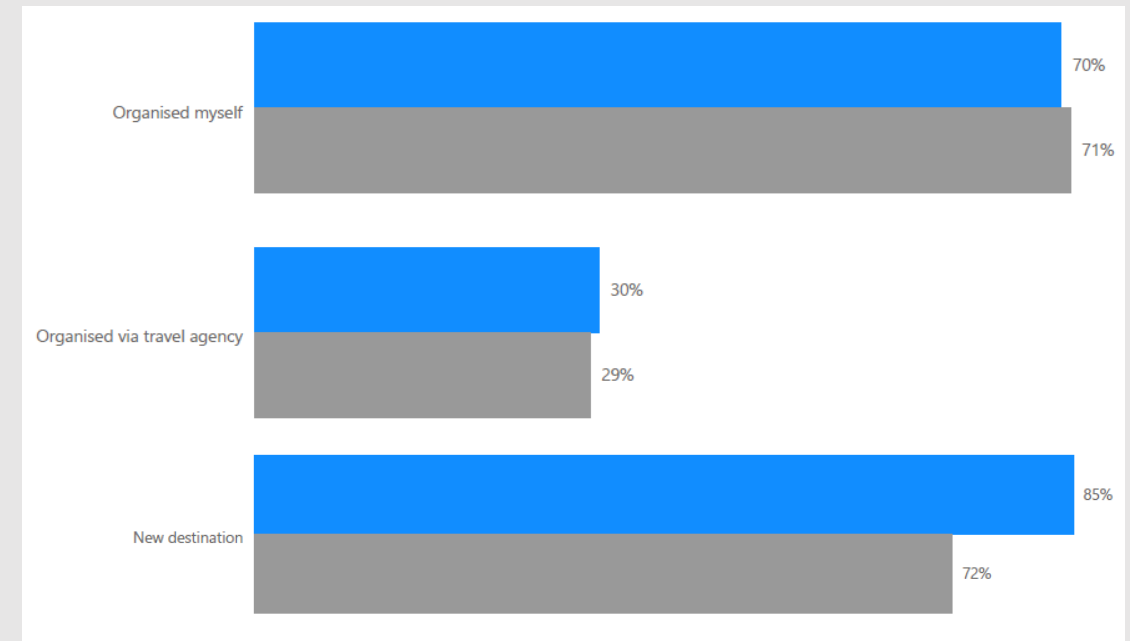
— Average **European source markets**, total vs. Spain



General preference for visiting iconic vs. lesser-known sites



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



Spain
All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



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