



Luxembourg for Tourism

Market profile

PORTUGAL

2022



Economic indicators & General Travel Demand

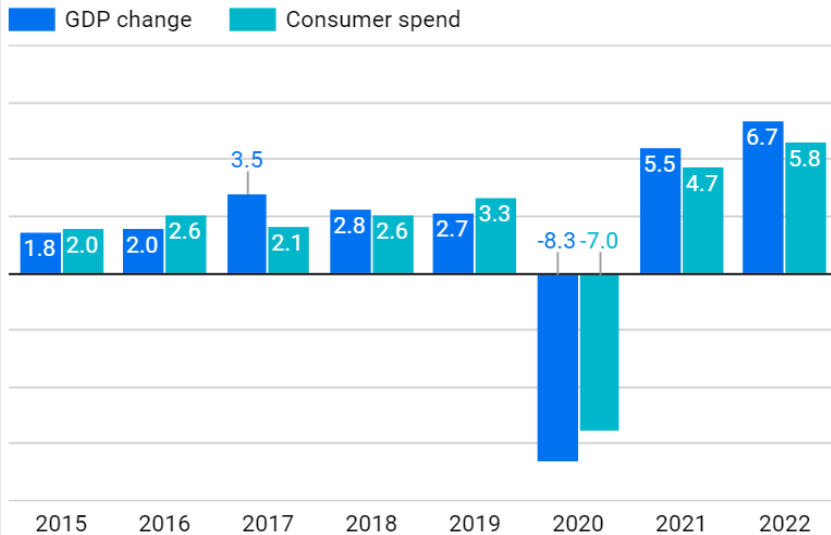
Economic indicators - General travel demand



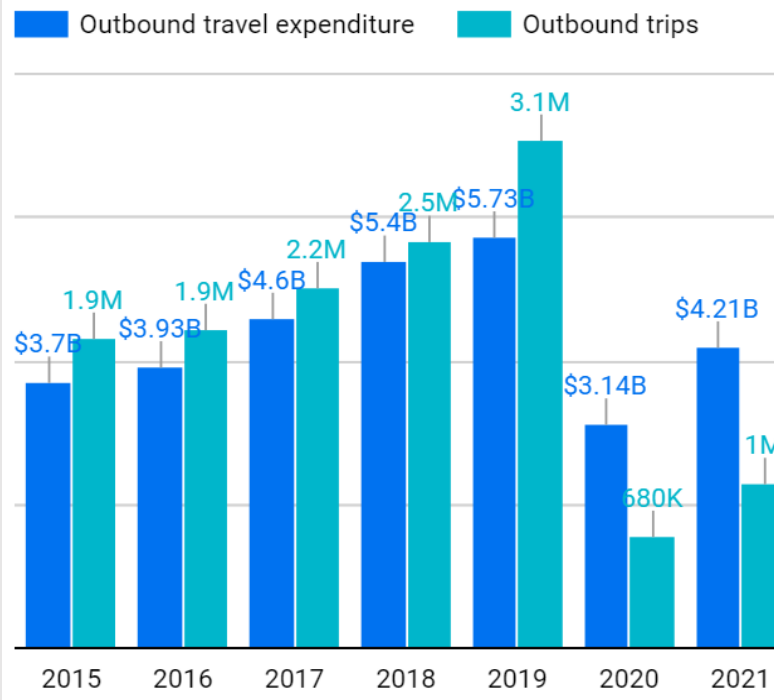
Economy & population

GDP (PPP) per capita **\$34,970** Unemployment (%) **6.3** Population (mn) **10.3** Inflation (%) **7.8**

GDP and Consumer spending, % annual change



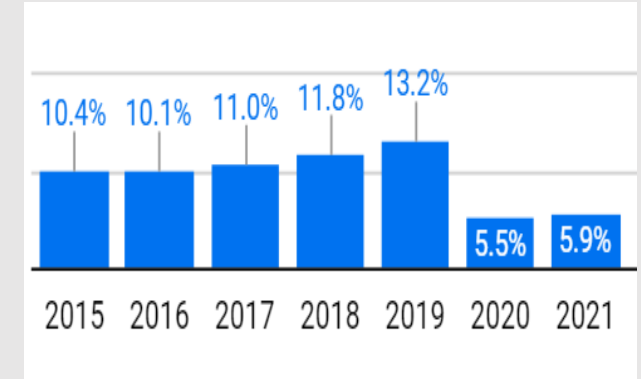
Outbound trips and travel expenditure



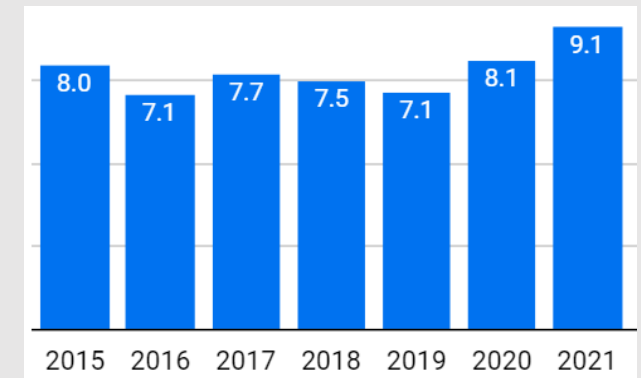
Average spend per outbound trip (2019)
1.848 \$

Outbound travel intensity per inhabitant (2019)
0.3 trips

Share of outbound travel, % all trips



Average length of stay, nights, all outbound trips



Share of leisure, % all outbound trips (2019)
76.7%



Arrivals & nights in paid accommodation in Luxembourg

Nights, arrivals & length of stay in paid accommodation 2022

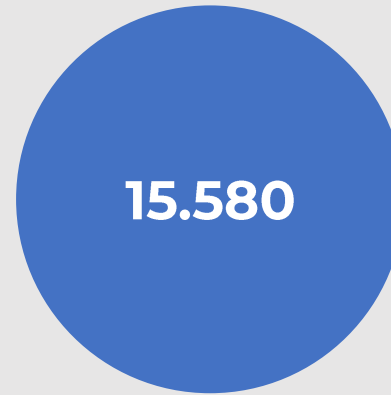


**Nights,
paid accommodation, 2022**



+35% (vs. 2021)
+47% (vs. 2019)

**Arrivals,
paid accommodation, 2022**



+55% (vs. 2021)
+39% (vs. 2019)

**Average length of stay,
paid accommodation, 2022**



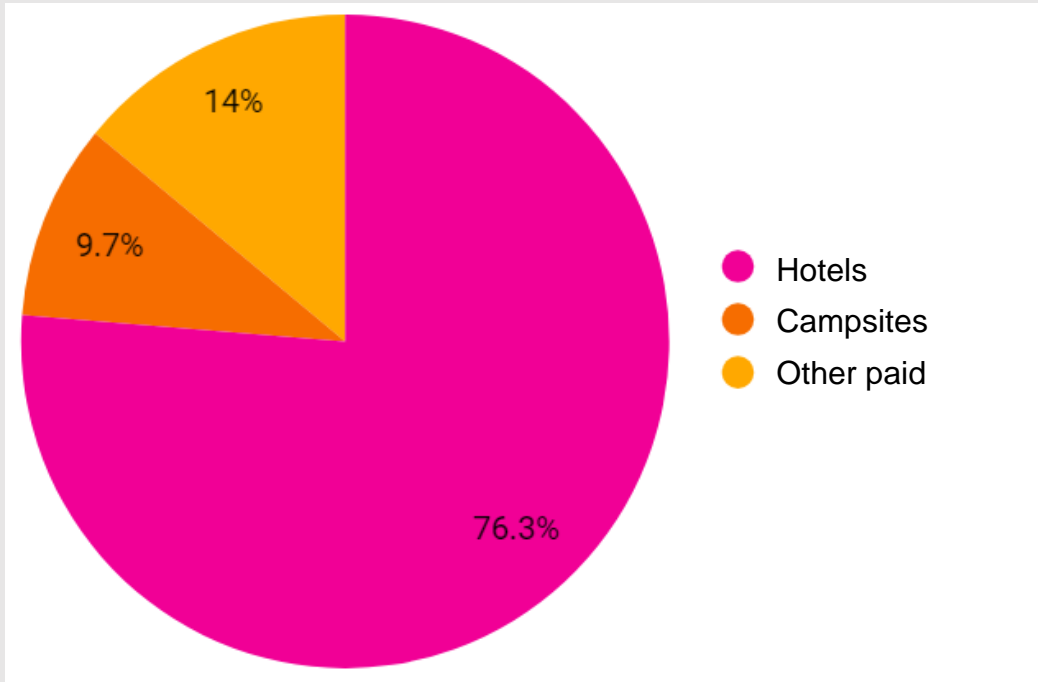
-0.32 days (vs. 2021)
+0.13 days (vs. 2019)

Nights & arrivals in paid accommodation

Type of accommodation, 2022

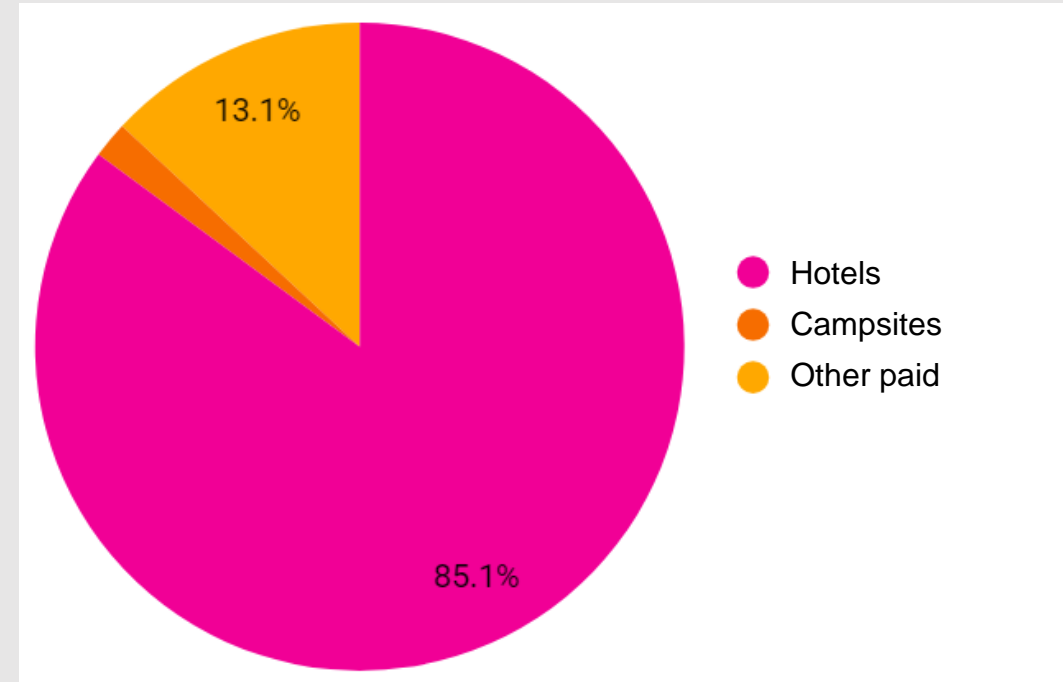


Nights, paid accommodation



Hotels	26.245	+37% (vs. 2019)
Campsites	3.338	+104% (vs. 2019)
Other paid	4.825	+91% (vs. 2019)

Arrivals, paid accommodation



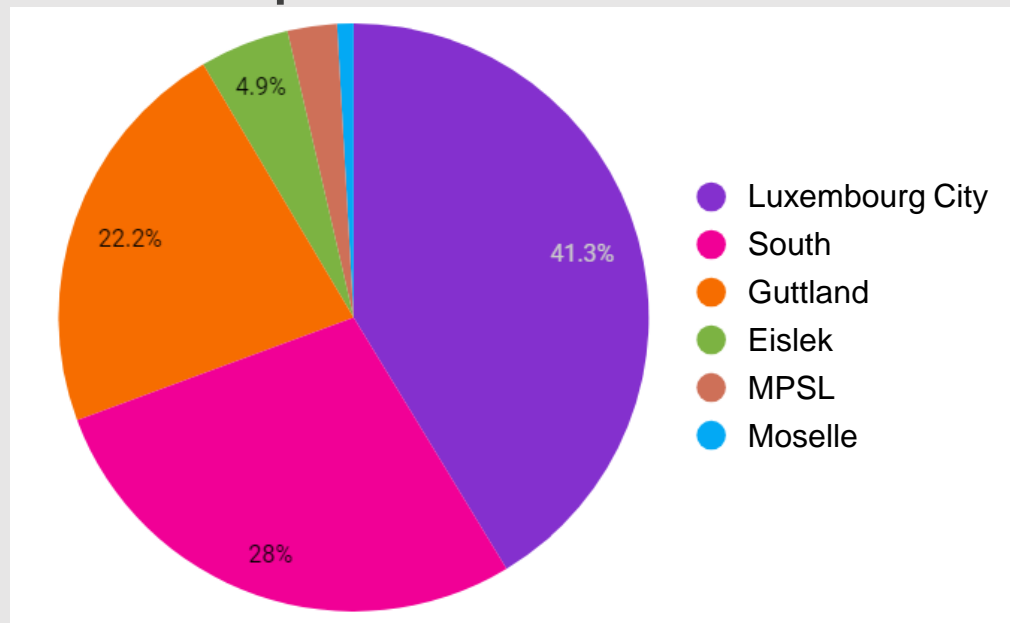
Hotels	13.261	+34% (vs. 2019)
Campsites	282	+46% (vs. 2019)
Other paid	2.037	+77% (vs. 2019)

Nights & arrivals in paid accommodation

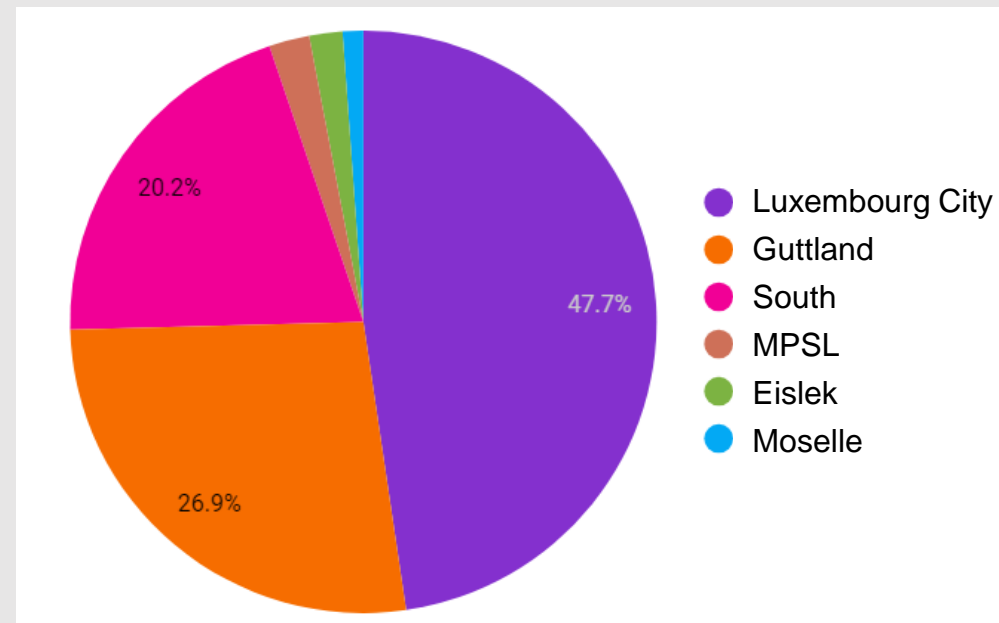
Regions, 2022



**Nights,
paid accommodation**



**Arrivals,
paid accommodation**



Luxembourg City	14.221	+18% (vs. 2019)
South	9.627	+57% (vs. 2019)
Guttland	7.630	+183% (vs. 2019)
Eislek	1.688	+14% (vs. 2019)
MPSL	932	+54% (vs. 2019)
Moselle	310	-25% (vs. 2019)

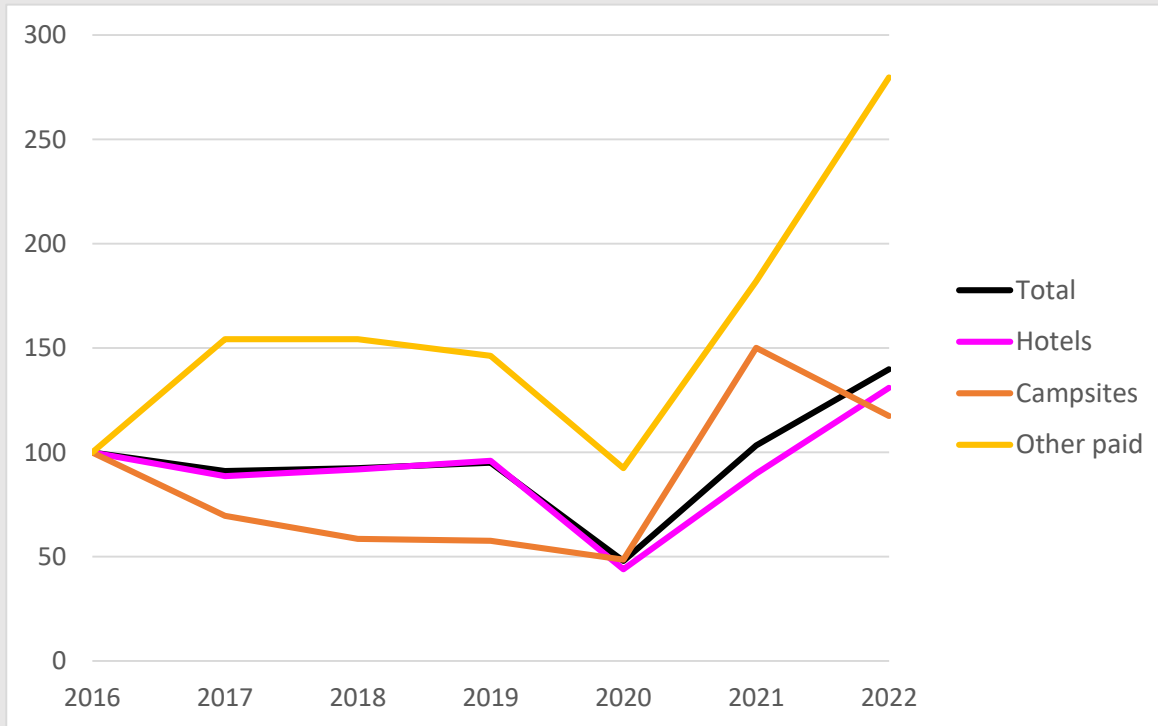
Luxembourg City	7.427	+17% (vs. 2019)
Guttland	4.192	+153% (vs. 2019)
South	3.151	+19% (vs. 2019)
MPSL	348	+142% (vs. 2019)
Eislek	285	+7% (vs. 2019)
Moselle	177	+14% (vs. 2019)

Nights in paid accommodation

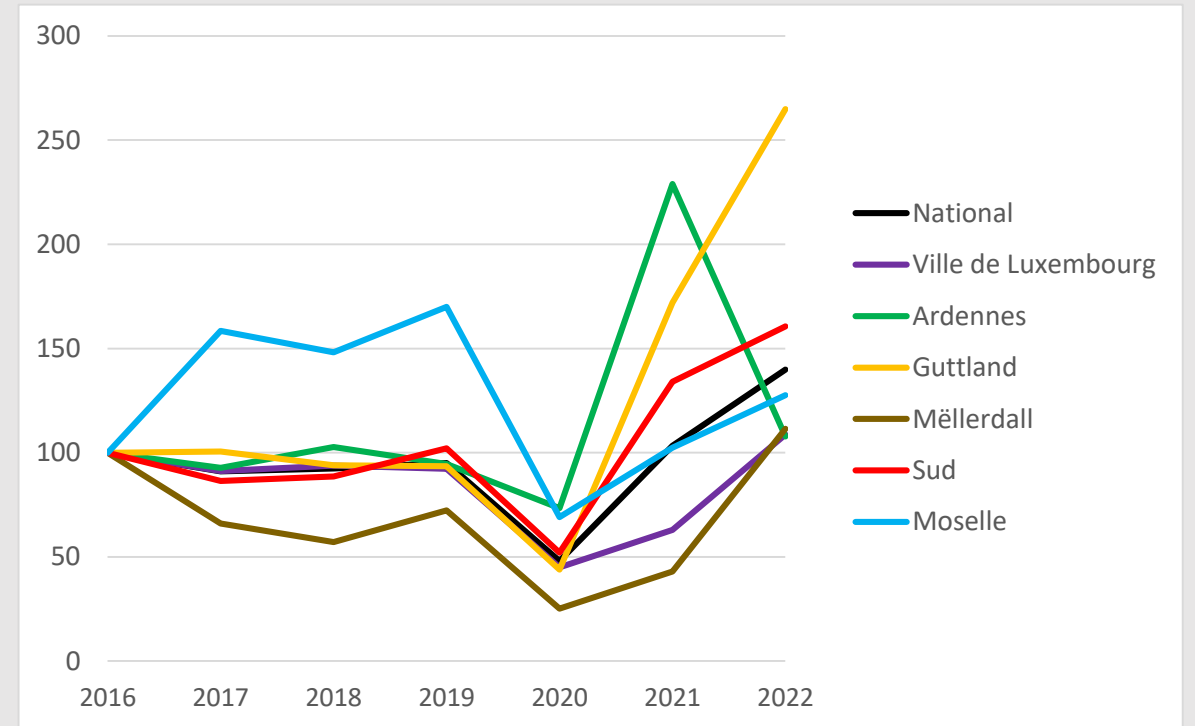
Total, Type of accommodation & Regions : Trends 2016-2022



2016 = Index 100



2016 = Index 100

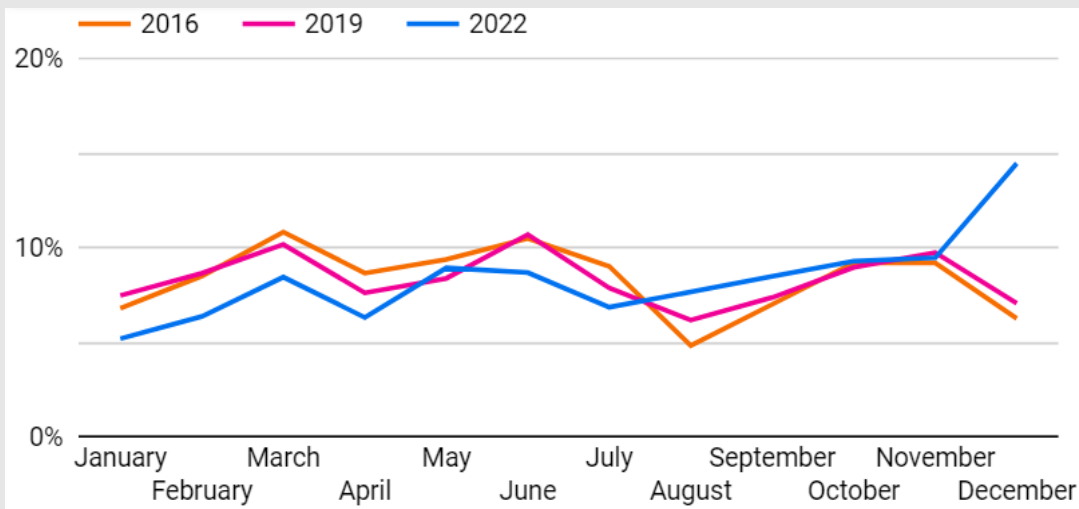


Nights in paid accommodation

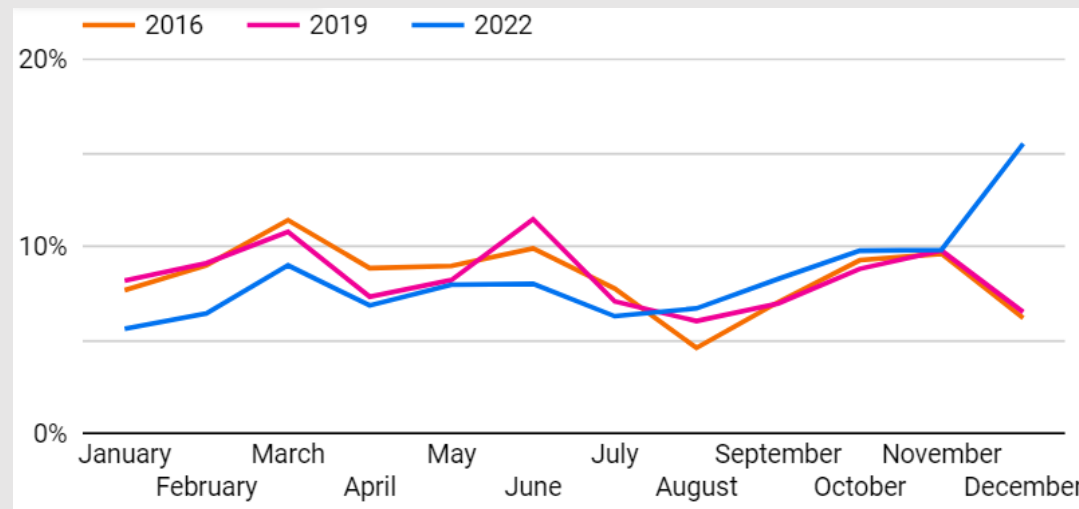
Seasonality



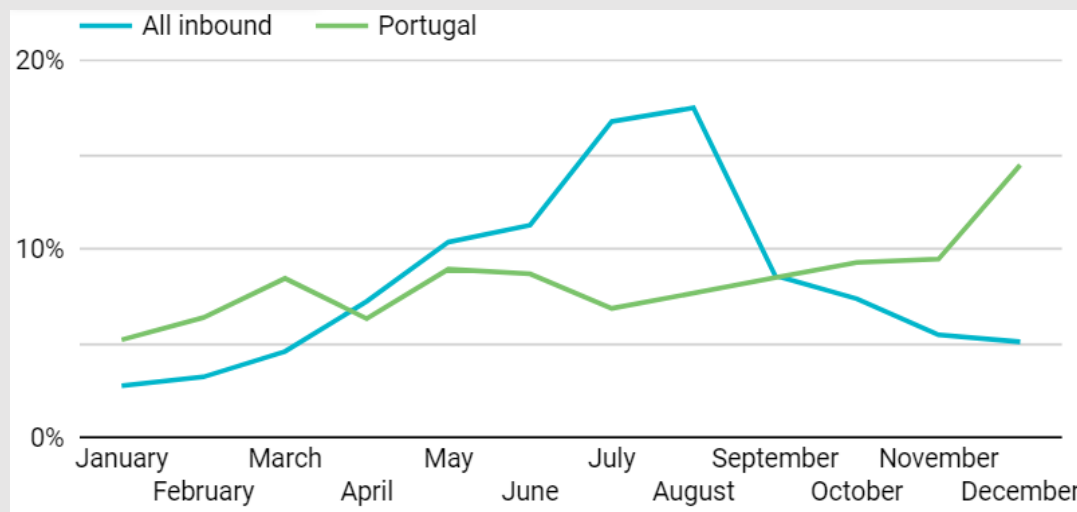
Portuguese nights, all paid accommodation



Portuguese nights, hotels



Nights, all paid accommodation, 2022



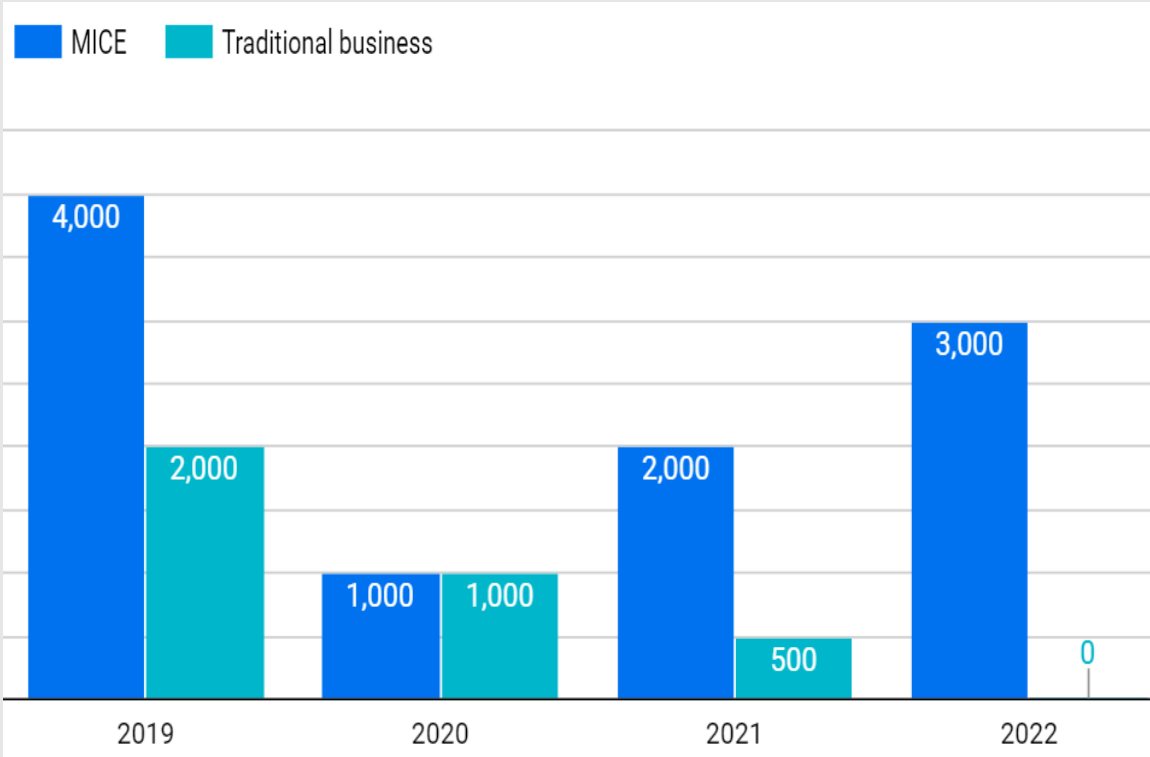
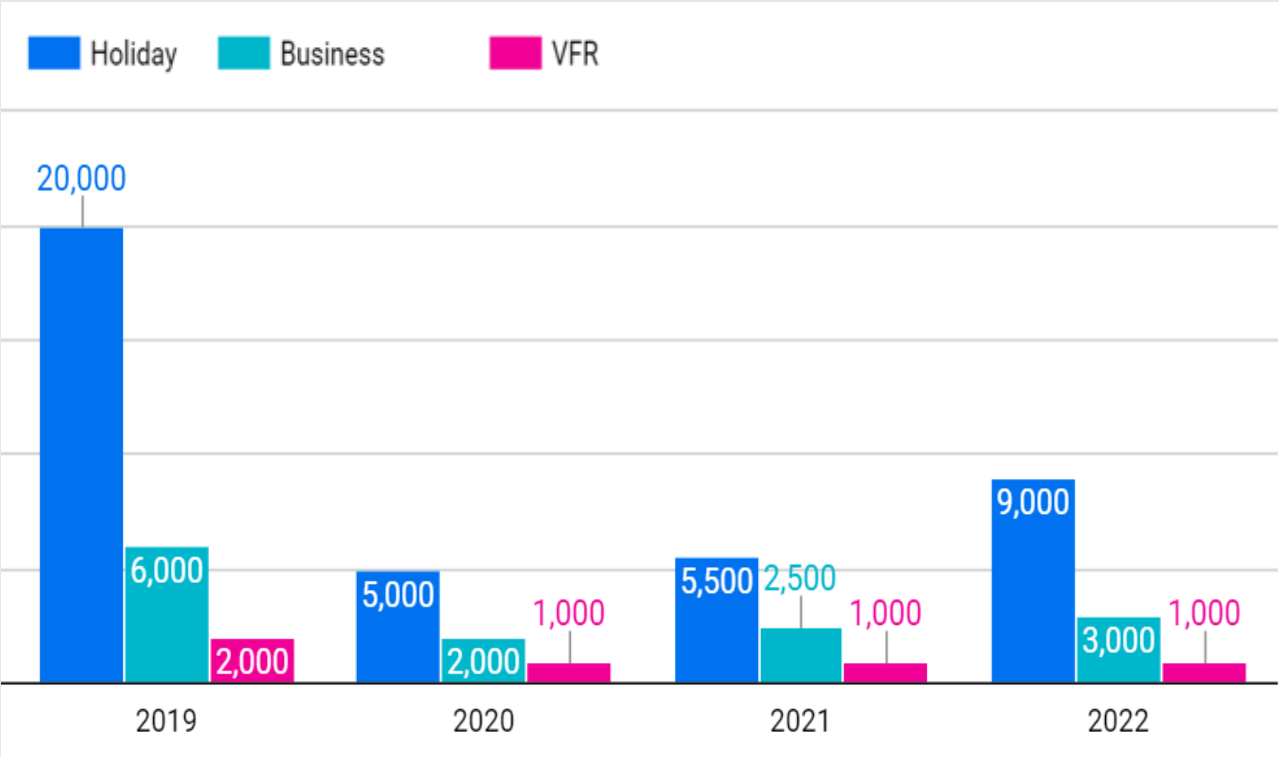


Characteristics of Portuguese inbound trips to Luxembourg

Portuguese trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2019-2022

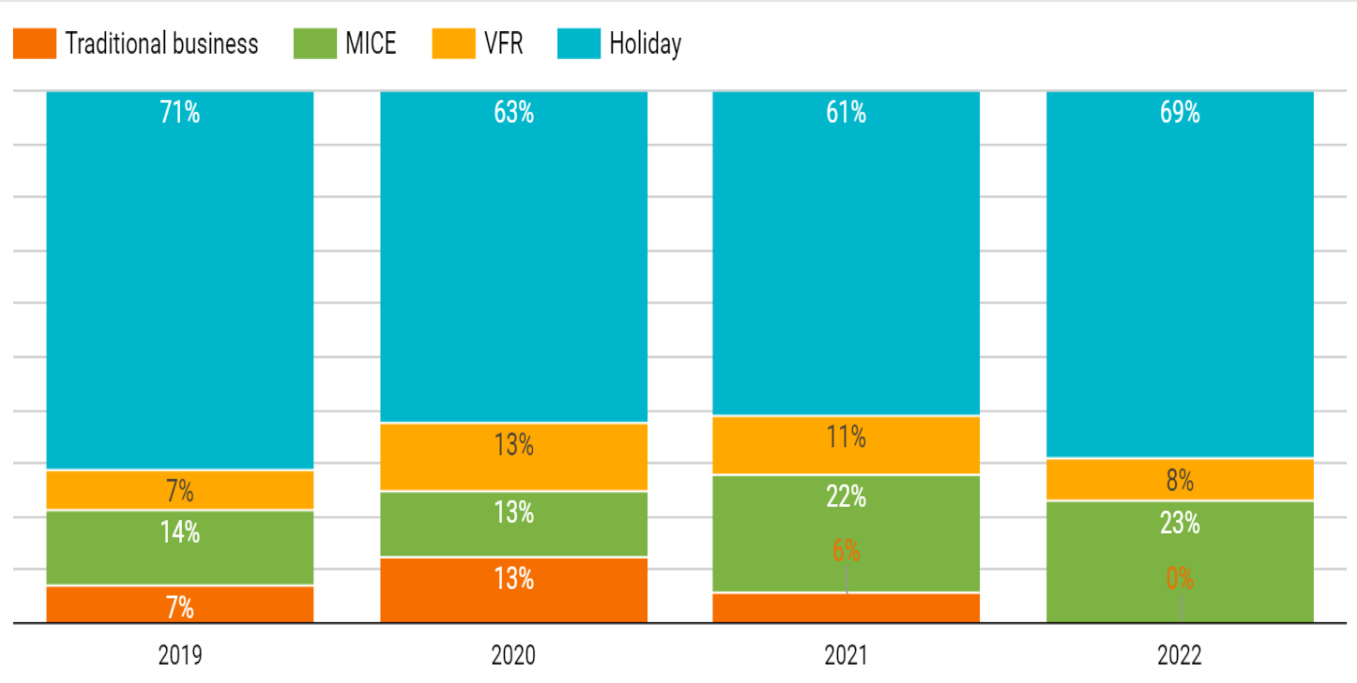


Portuguese trips to Luxembourg with overnight (all accommodation)



Purpose of visit, 2016-2022

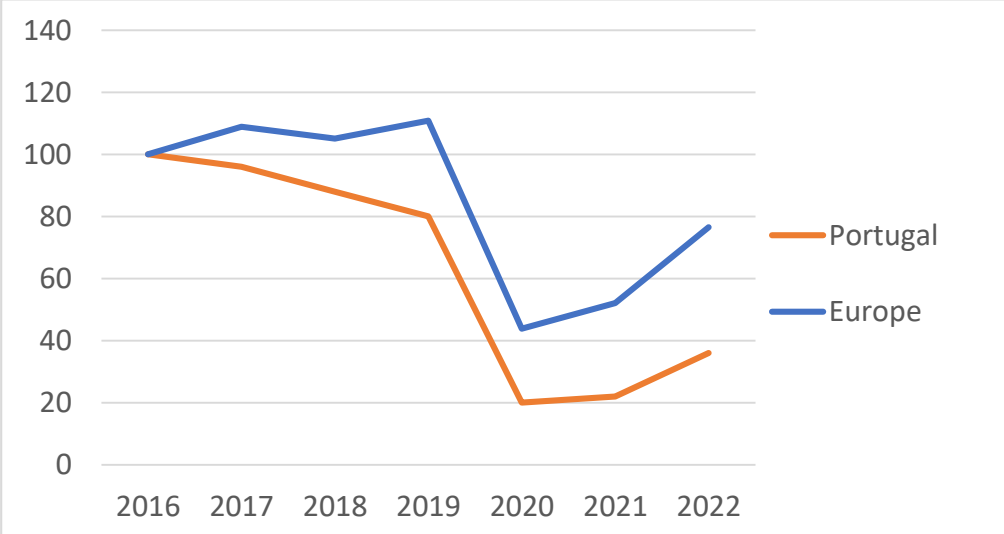
Portuguese trips to Luxembourg, 2019-2022



2022

	Portugal to Luxembourg	Europe to Luxembourg
Holiday	69%	63%
VFR	8%	17%
MICE	23%	12%
Traditional Business	0%	8%

Portuguese & European holiday trips to Luxembourg, 2016 = index 100



Source: World Travel Monitor/IPK International.

Portuguese same-day trips to Luxembourg

2022



Number of Portuguese same-day trips to Luxembourg

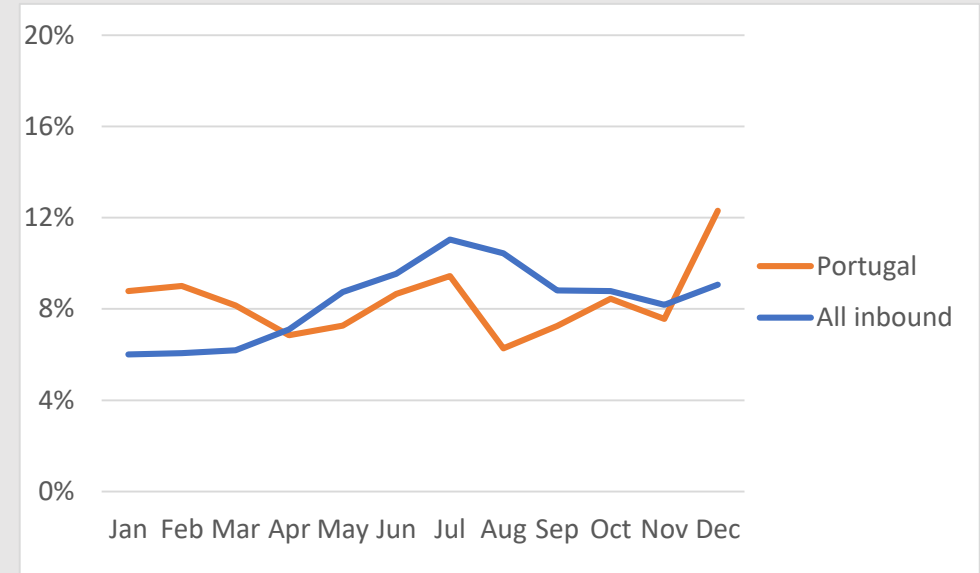
30.000
(1%
of inbound
same-day trips
to
Luxembourg)

+18% (vs. 2021)

Average length of same-day trips

8,3 h
(All
inbound
7,3h)

Seasonality of same-day trips, % monthly share





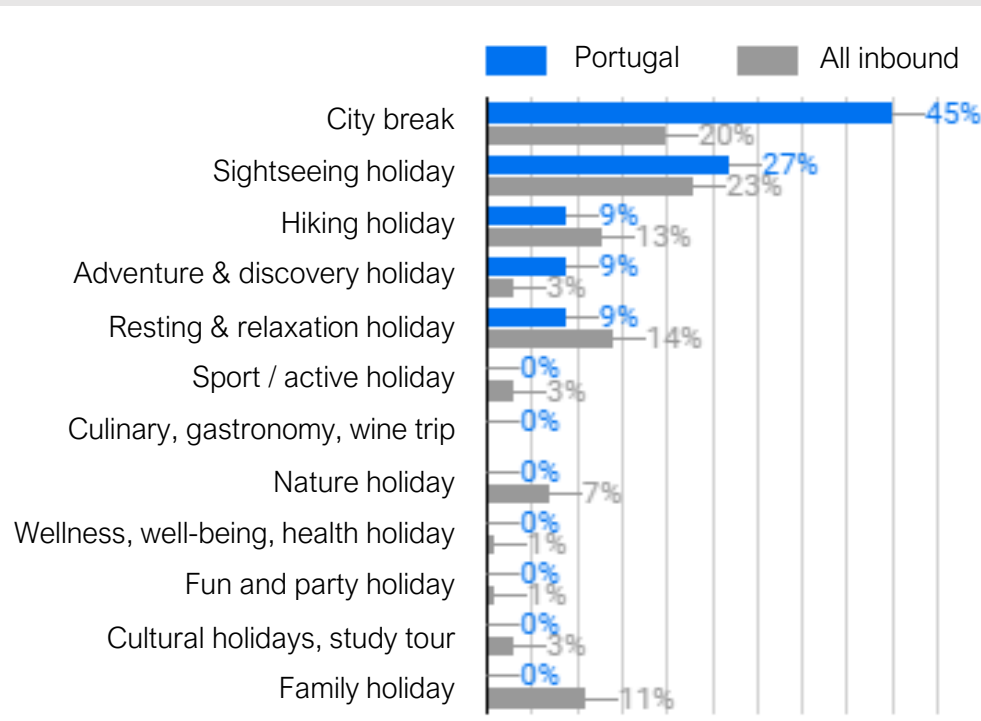
Travel behaviour of Portuguese leisure visitors in Luxembourg

Holiday types

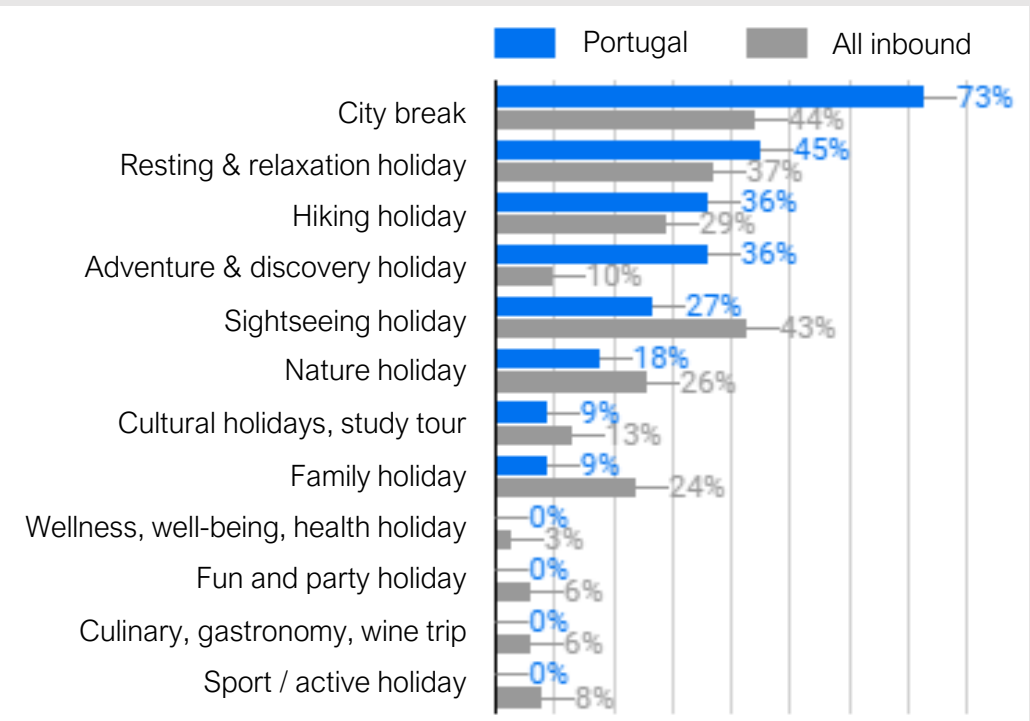
Inbound leisure visitors with overnight, 2020-2022



Main holiday types

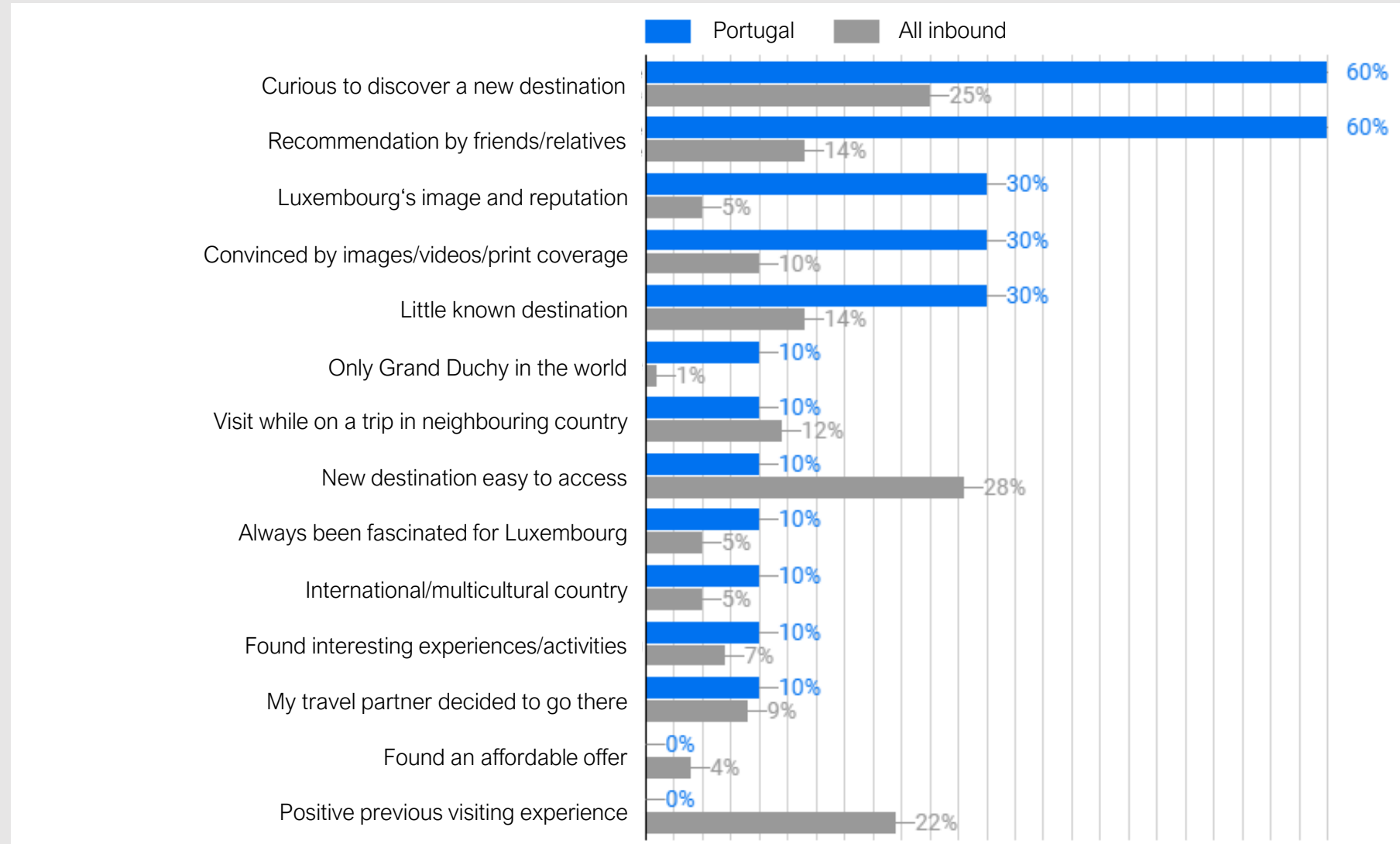


Additional holiday types



Key decision criteria for choosing Luxembourg

Inbound leisure visitors with overnight (*), 2020-2022

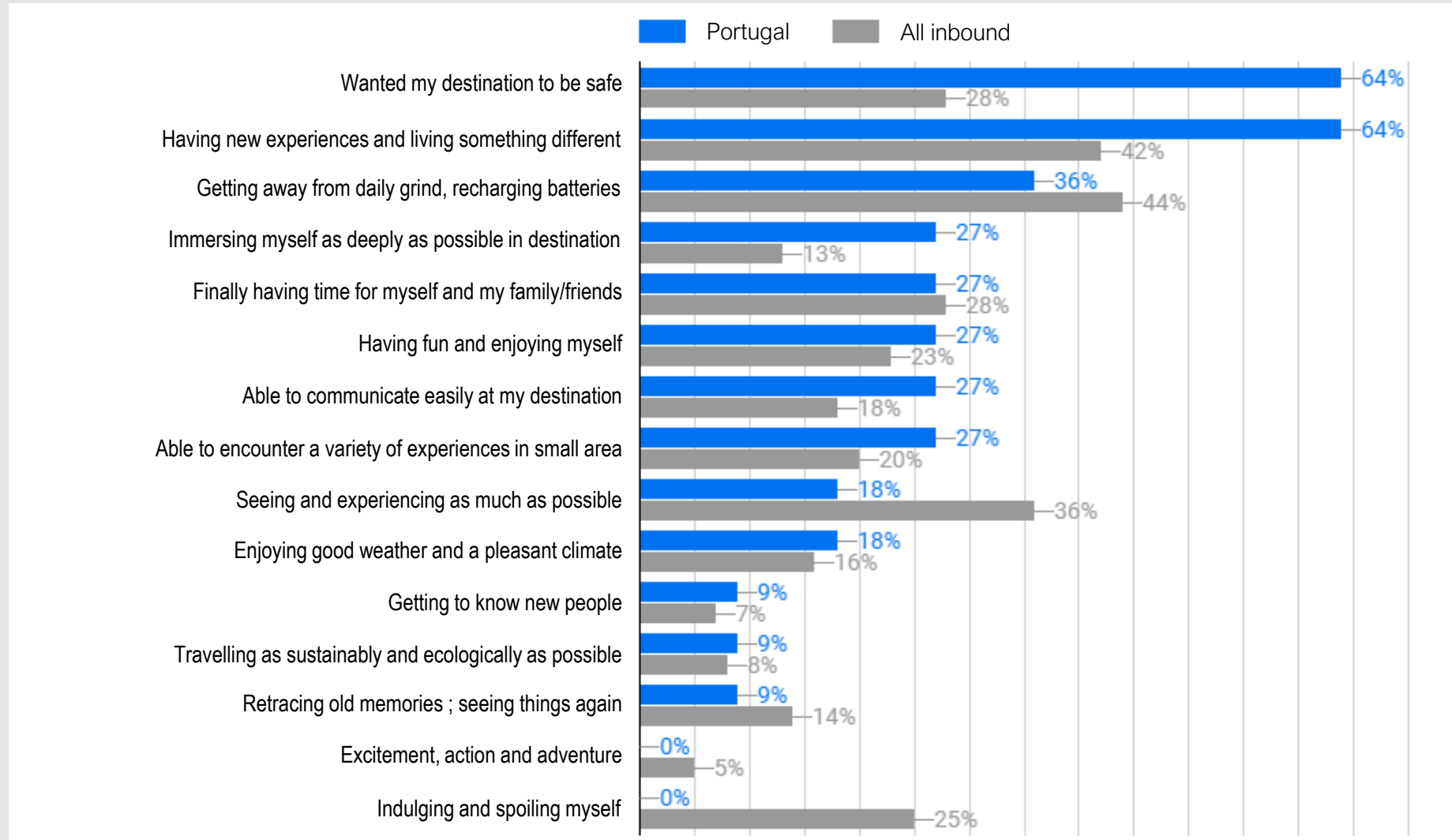


Source: LFT/Ilres Visitor Survey, 2020-2022.

(*) Maximum 3 answers possible.

Key travel motivations

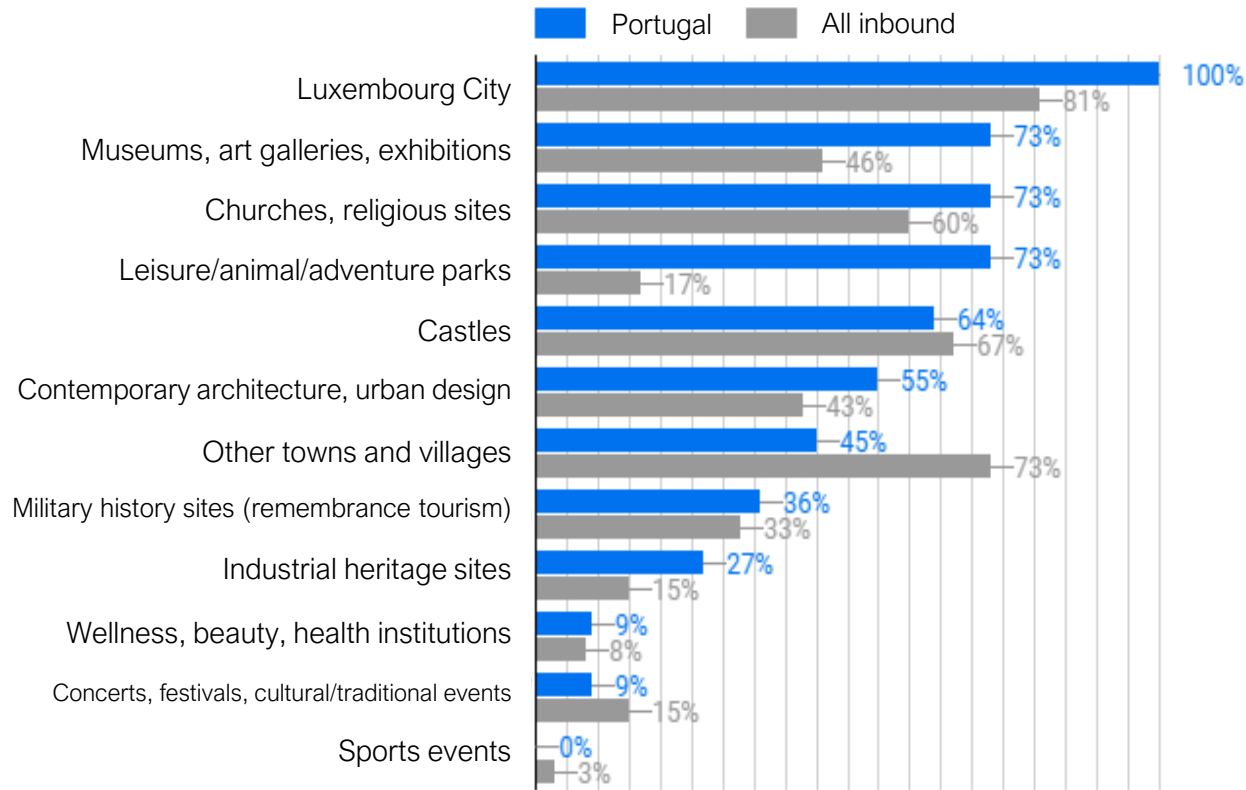
Inbound leisure visitors with overnight, 2020-2022



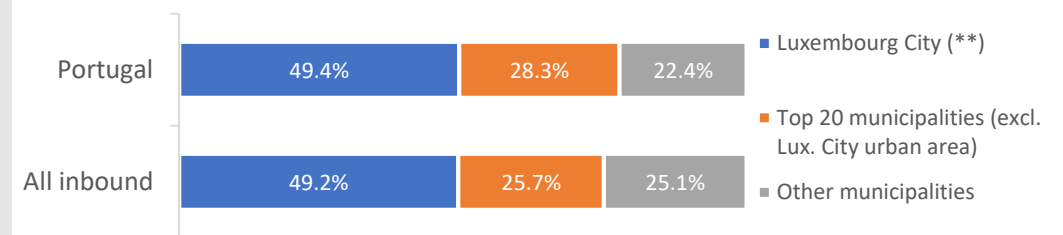
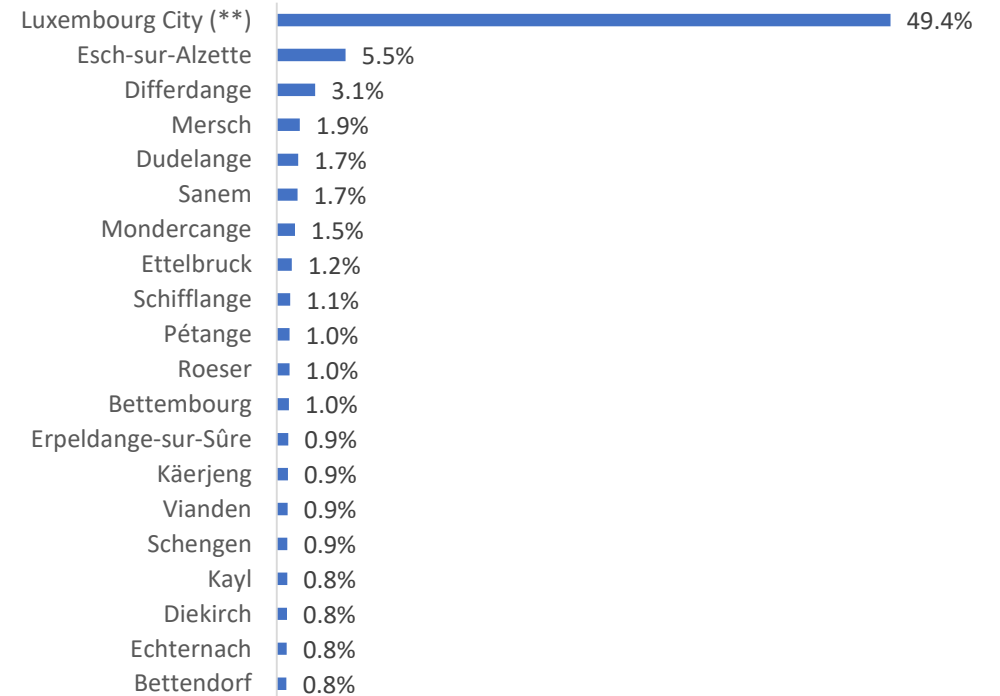
Type of places and cities visited in Luxembourg



Places visited during leisure overnight stays¹



Top cities visited during Portuguese overnight and same-day trips² (*), 2022



Sources: ¹LFT/Ilres Visitor Survey, 2020-2022, ²Mobile phone data (Editus/LFT).

(*) In the case of overnight trips : includes city where night is spent. Includes all cities with at least 1 hour of visit.

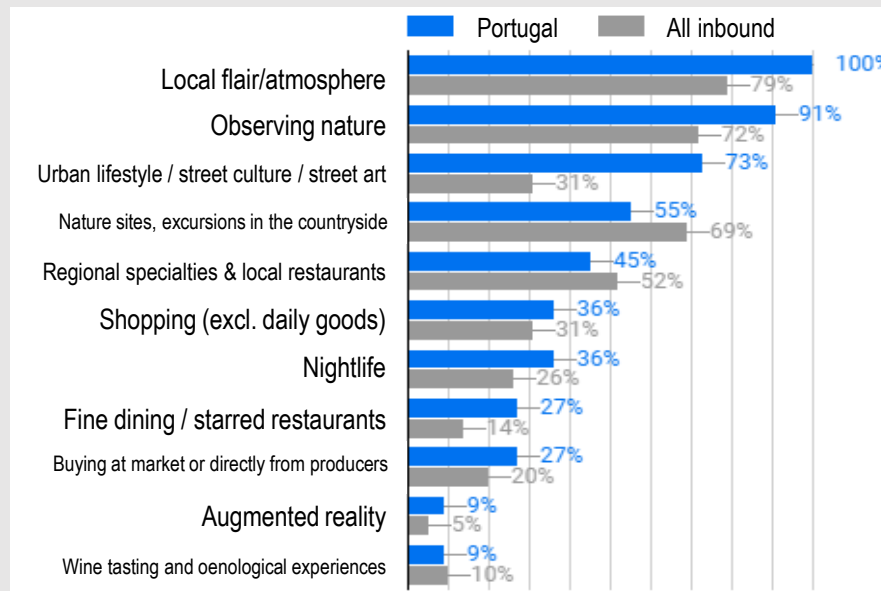
(**) Urban area, incl. Niederanven, Walferdange, Hesperange, Sandweiler, Leudelange, Mamer, Strassen, Bertrange).

Activities undertaken in Luxembourg

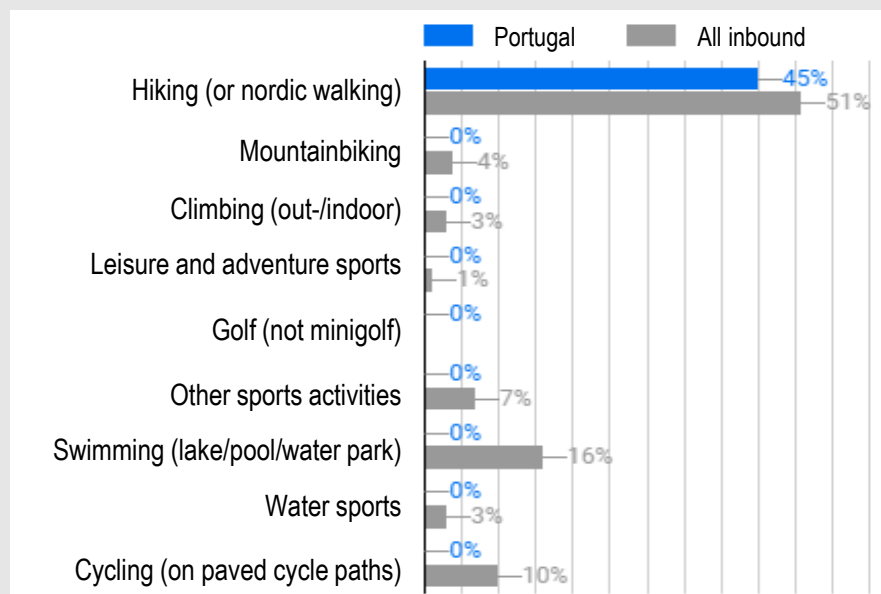
Inbound leisure visitors with overnight, 2020-2022



Non-sporting activities



Sporting activities

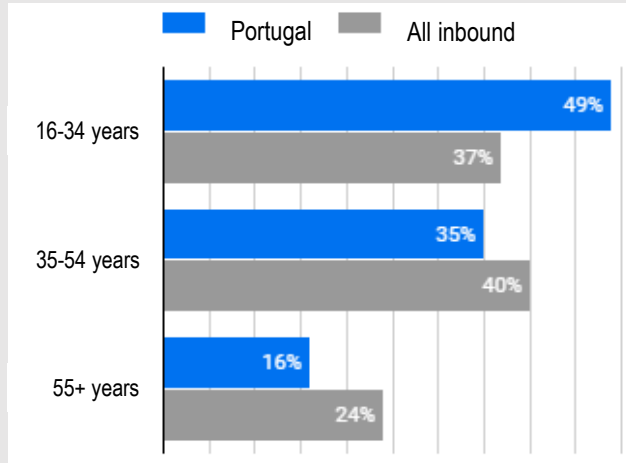


Transport, travel party, age, repeat visits and cross-border trips

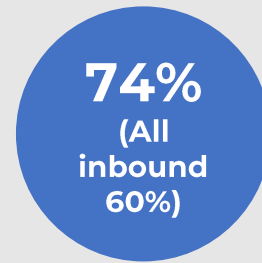
Inbound leisure visitors with overnight, 2020-2022



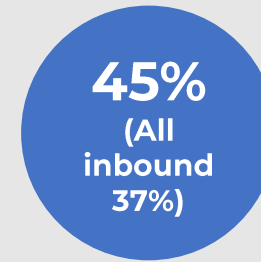
Age groups



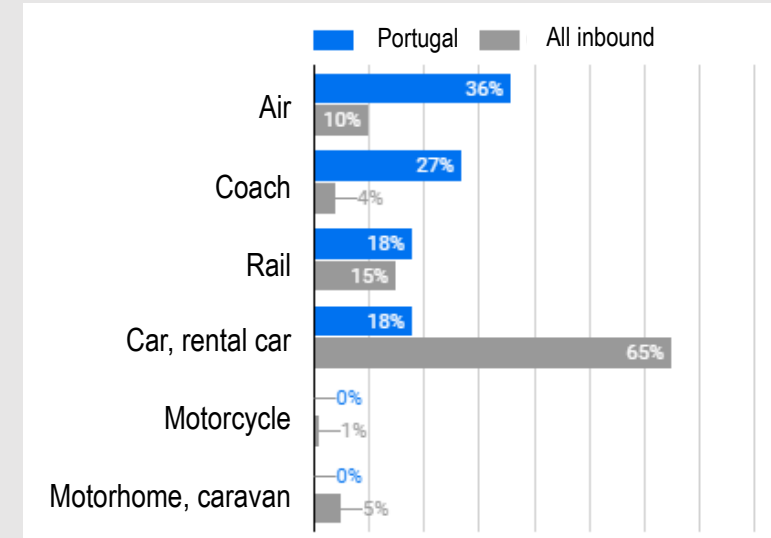
First-time visitors



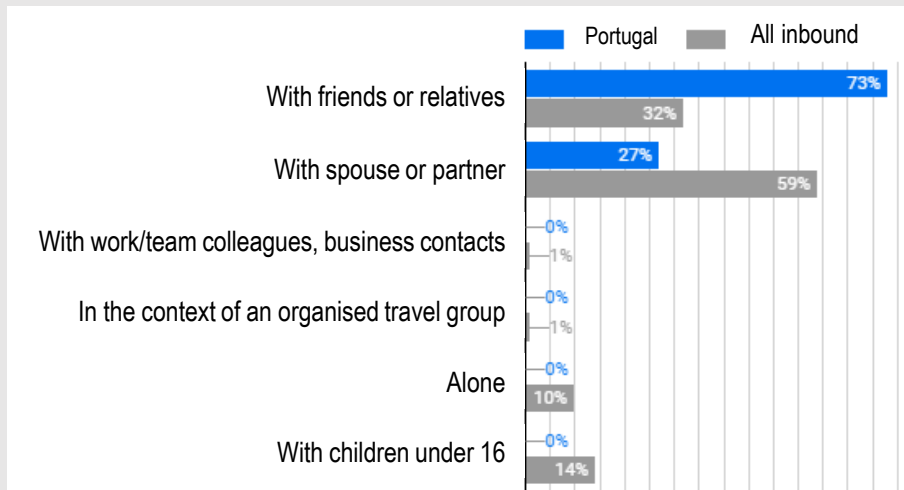
Visitors spending nights in Luxembourg and abroad during same trip



Mode of transport to access Luxembourg



Travel party

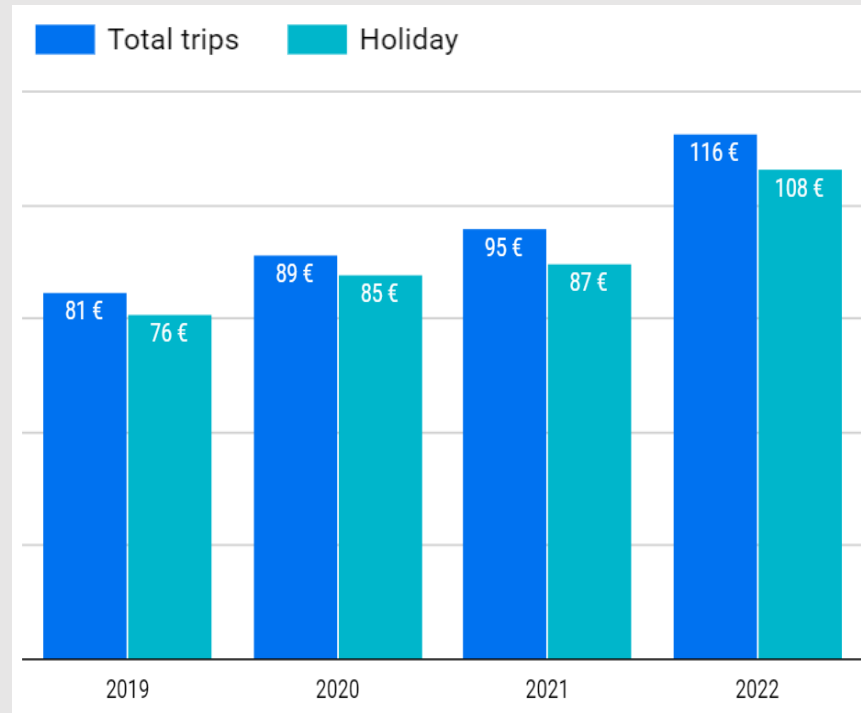


Expenditure



Inbound trips to Luxembourg with overnight (all accommodation)

Portuguese trips to Luxembourg : average spend per pers. per day



2022

Portugal to
Luxembourg

Europe to
Luxembourg

Spend/day/pers. on **all** trips

116 €

124 €

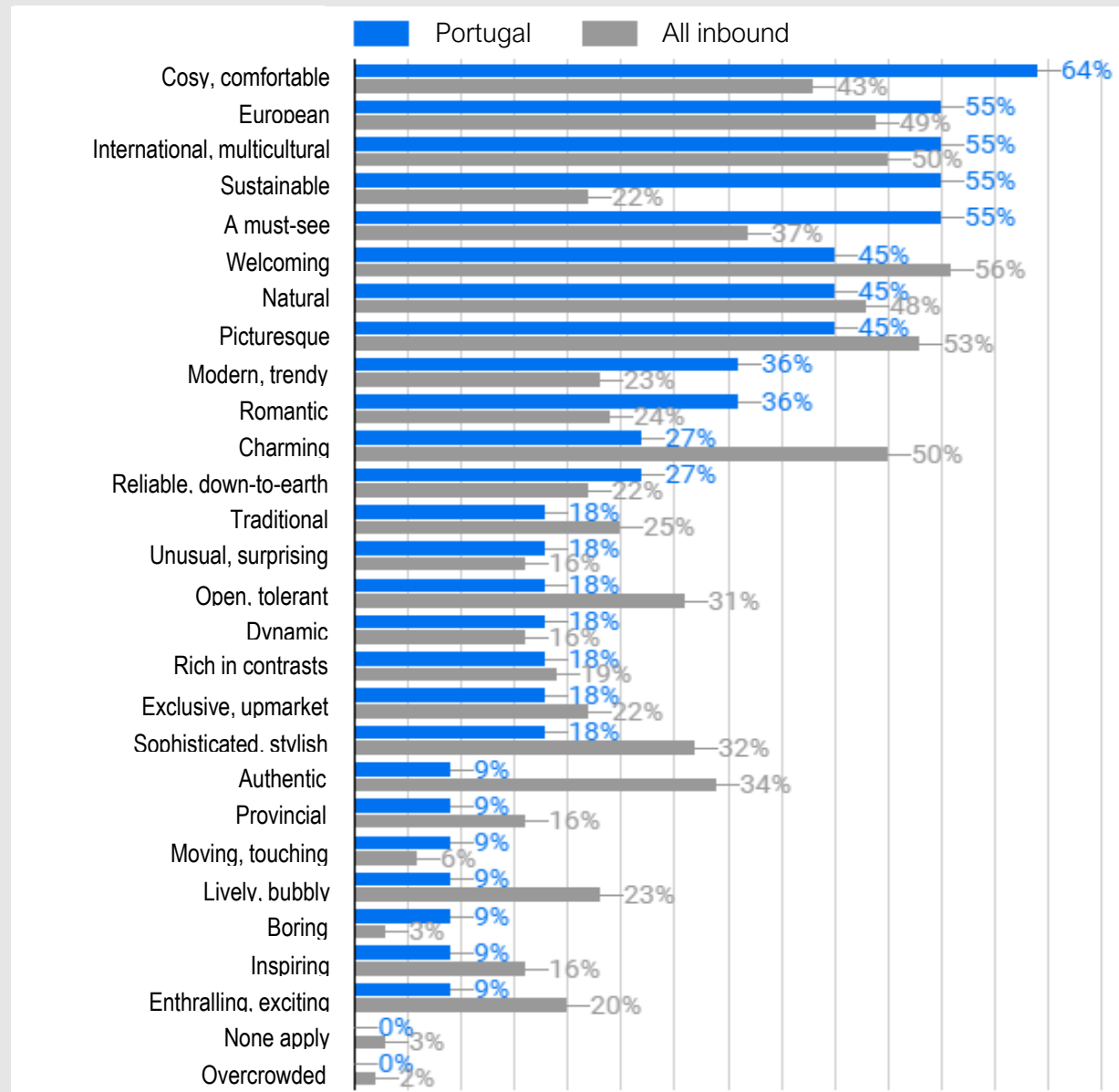
Spend/day/pers. on **holiday** trips

108 €

118 €

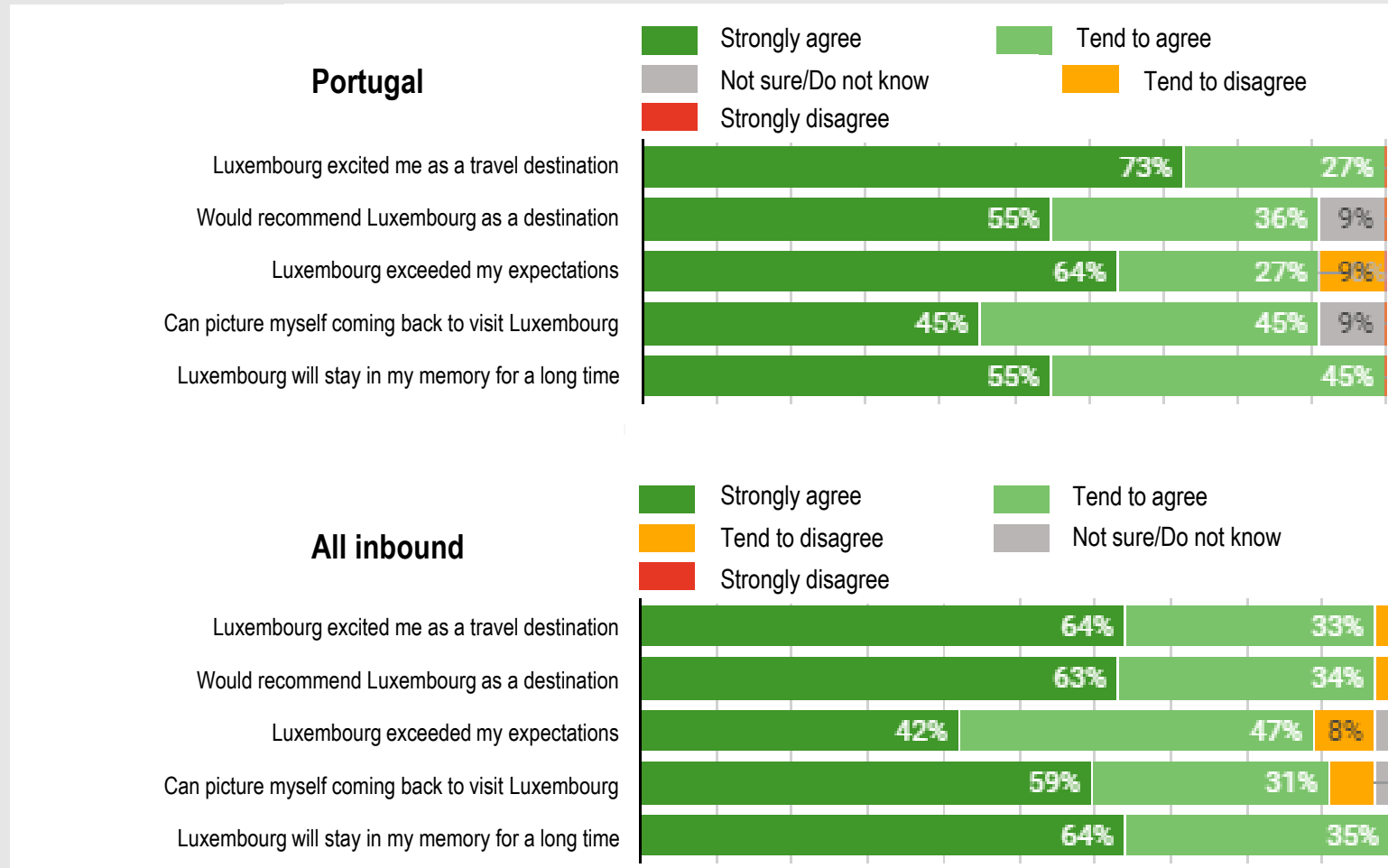
Image perception of Luxembourg

Leisure overnight visitors



Visitor satisfaction and recommendation

Inbound leisure visitors, 2020-2022

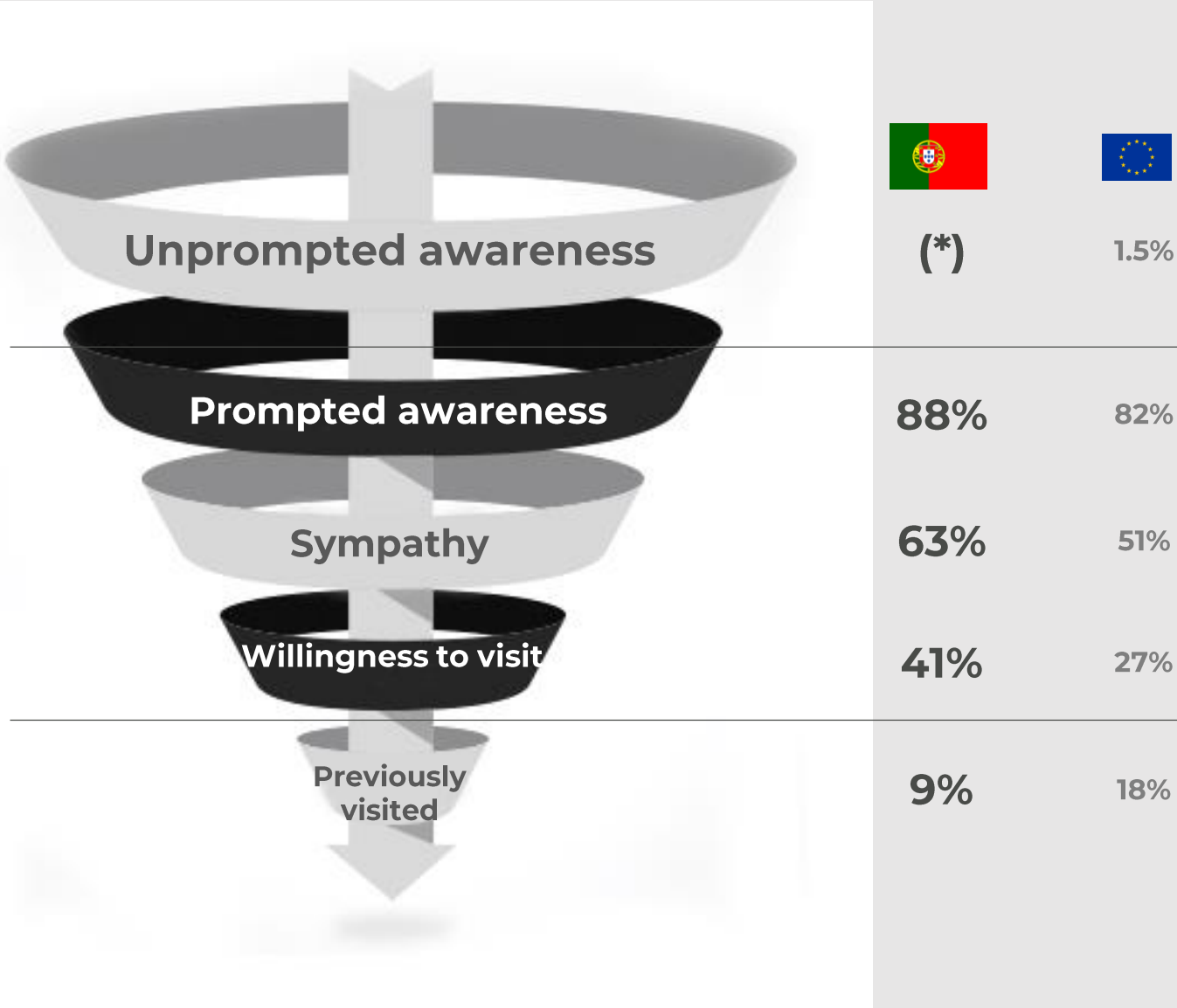




Target segments, Brand & Growth Potential

Brand Funnel 2021-2023

Assessing Luxembourg's brand strength as a destination



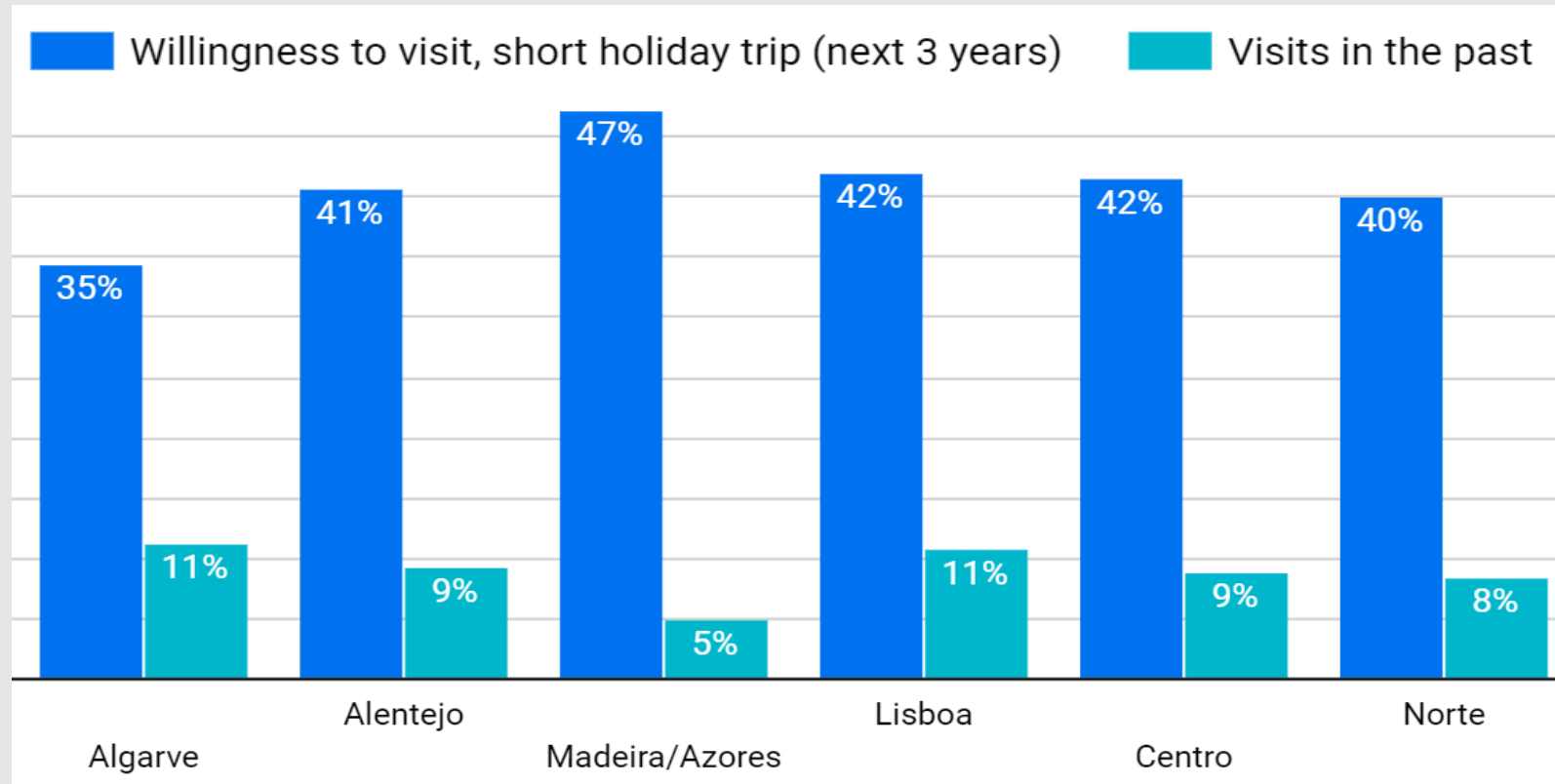
Total future visitor potential from Portugal ()**
3.2 million

- Highest future travel intent from Portugal (***)**
1. Nature-Loving Actives
 2. Perfection Seekers
 3. Explorers

Source: LFT.
 (*) Not compiled in Portugal.
 (**) Based on travel intent for next 3 years.
 (***) Based on relative shares of travel intent for next 3 years.




Regional origin 2021-2022

Past visitors and future potential



General theme interest (*)






Theme			
	Rank	Rank	% interested
Culinary	2	1	69%
Resting/Relaxation	1	2	69%
Family	11	3	69%
Nature	3	4	69%
Culture	6	5	66%
Wellness	13	6	65%
History/Unesco	7	7	65%
Sustainability	9	8	65%
City	4	9	64%
Castles	5	10	63%
Countryside	15	11	56%
Hiking	8	12	56%
Events	14	13	55%
Nightlife (**)	12	14	54%
Wine	16	15	49%
Shopping	10	16	48%
Active-sports	18	17	47%
Industrial heritage	19	18	45%
Luxury	17	19	45%
Camping	20	20	40%
MTB	22	21	30%
Cycling	21	22	27%
Motorcycling	23	23	22%

(*) 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
Resting/Relaxation	2	1	52%
Family	14	2	51%
City	1	3	50%
Culture	4	4	50%
Wellness	9	5	50%
Nature	7	6	48%
History/Unesco	8	7	48%
Culinary	6	8	48%
Sustainability	12	9	45%
Nightlife (***)	11	10	45%
Castles	3	11	44%
Hiking	10	12	43%
Shopping	5	13	42%
Countryside	17	14	39%
Active-sports	18	15	39%
Wine	16	16	37%
Industrial Heritage	19	17	36%
Camping	15	18	34%
MTB	20	19	29%
Cycling	13	20	26%

Growth potential for themes (**)

- Culinary
- Nature
- Castles
- Countryside

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




(**) Themes for which Luxembourg's theme suitability is still relatively low, compared to the overall general theme interest.

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 Brand Value Ratings (*)



Feature			
	Rank	Rank	% agreeing
Safe	1	1	68%
Of high quality	2	2	60%
Welcoming, hospitable	4	3	59%
Open-minded, tolerant	8	4	55%
Authentic	3	5	55%
Dynamic, modern	6	6	52%
Attractive, appealing	5	7	50%
Surprising	9	8	45%
Service-oriented	11	9	45%
Lot of variety, diversified	10	10	42%
Sustainable	14	11	41%
Exclusive, luxurious	7	12	39%
Not crowded, insider tip	13	13	36%
Lively, hip	12	14	34%

(*) 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



LFT strategic market focus

Market prioritisation



Market Priority	Main Objective	Target Segment focus (in decreasing order of importance within category)
		Bold : main focus
6	Activating	Image: EXP . Activating: PS, NLA.

Theme & segment focus

Theme	Priority	Marketing	Segments
City	1	Image & Activating	PS, EXP
Nature	1	Image	PS, EXP
Sustainability	2	Image	EXP
Culture	2	Image	EXP
Culinary	2	Image & Activating	PS, EXP, NLA
Hiking	3	Image & Activating	NLA, EXP, PS

Brand Value focus

Theme	Priority	Segments
Not crowded/insider tip	1	PS EXP
Lively/hip	1	
Attractive	1	
Exclusive/luxurious	2	



Your contact



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