



Luxembourg for Tourism

**Market profile**

**PORTUGAL**

**2023**



# **Economic indicators & General Travel Demand**

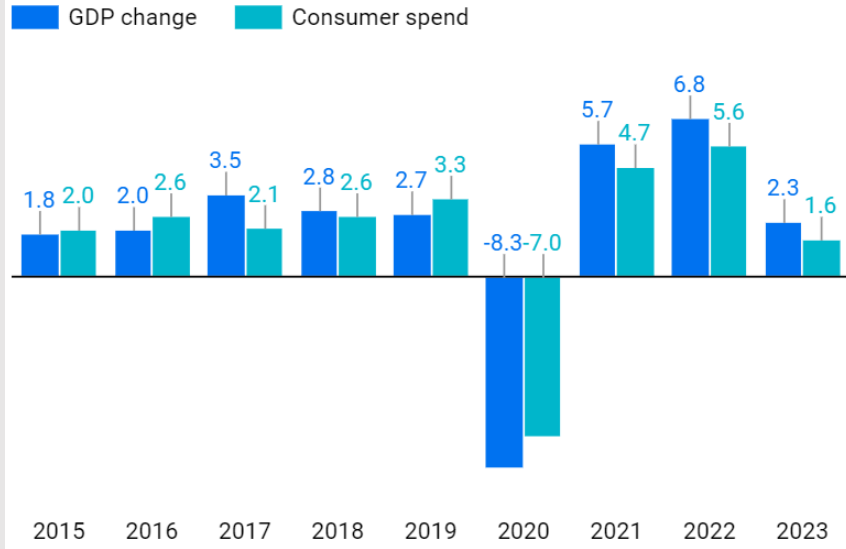
# Economic indicators - General travel demand



## Economy & population

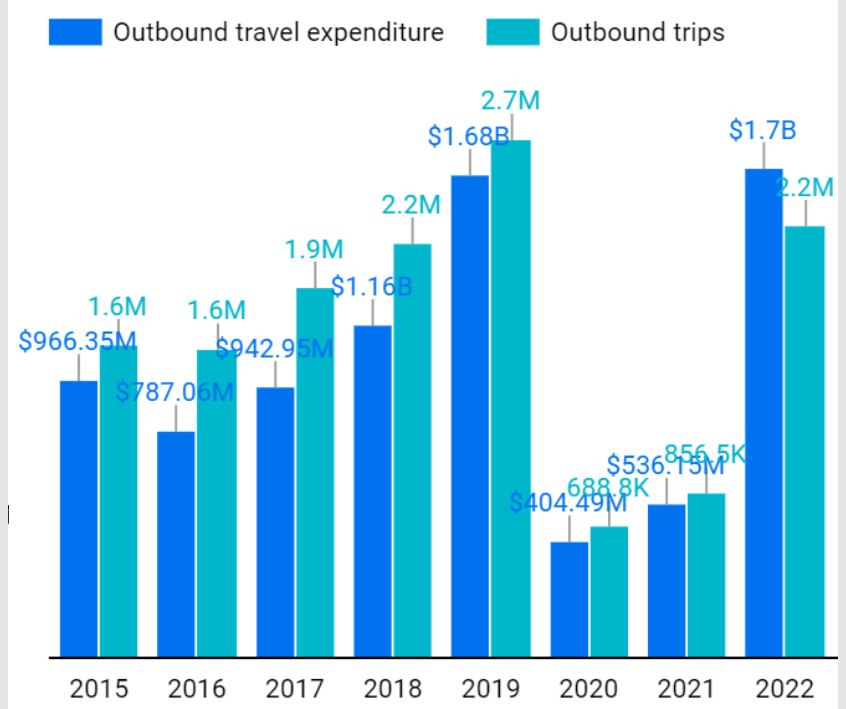
GDP (\$) per capita: 27,880  
 Unemployment (%): 6.6  
 Population (mn): 10.3  
 Inflation (%): 5.3

### GDP and Consumer spending, % annual change



Share of short trips (1-3 nights),  
 % all outbound trips (2022)  
**32.0%**

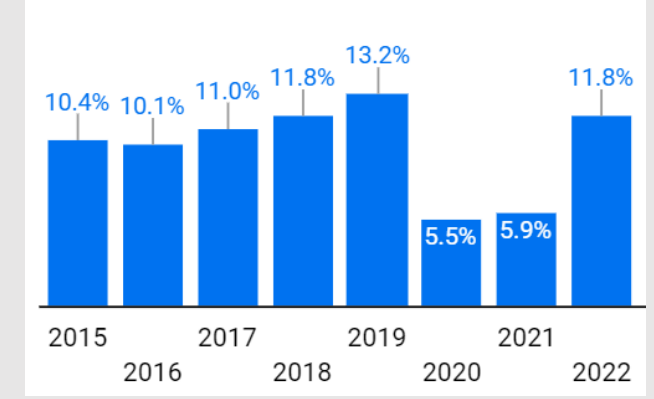
## Outbound trips and travel expenditure



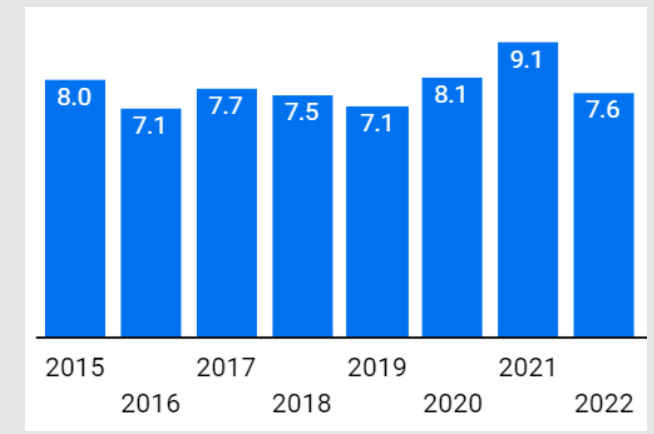
Average spend  
 per outbound trip (2019)  
**621 \$**

Outbound travel intensity  
**0.26 trips**  
 per inhabitant (2019)

## Share of outbound travel, % all trips



## Average length of stay, nights, all outbound trips



Share of leisure,  
 % all outbound trips (2022)  
**83.5%**



# **Arrivals & nights in paid accommodation in Luxembourg**

# Nights, arrivals & length of stay in paid accommodation 2023

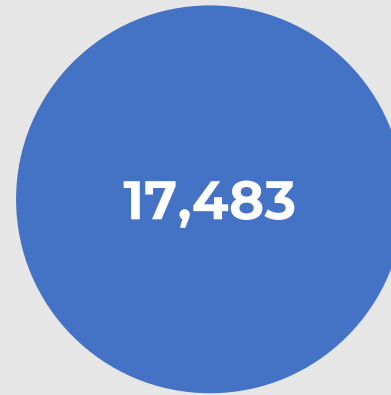


**Nights,  
paid accommodation, 2023**



**+2%** (vs. 2022)  
**+29%** (vs. 2019)

**Arrivals,  
paid accommodation, 2023**



**+9%** (vs. 2022)  
**+46%** (vs. 2019)

**Average length of stay,  
paid accommodation, 2023**



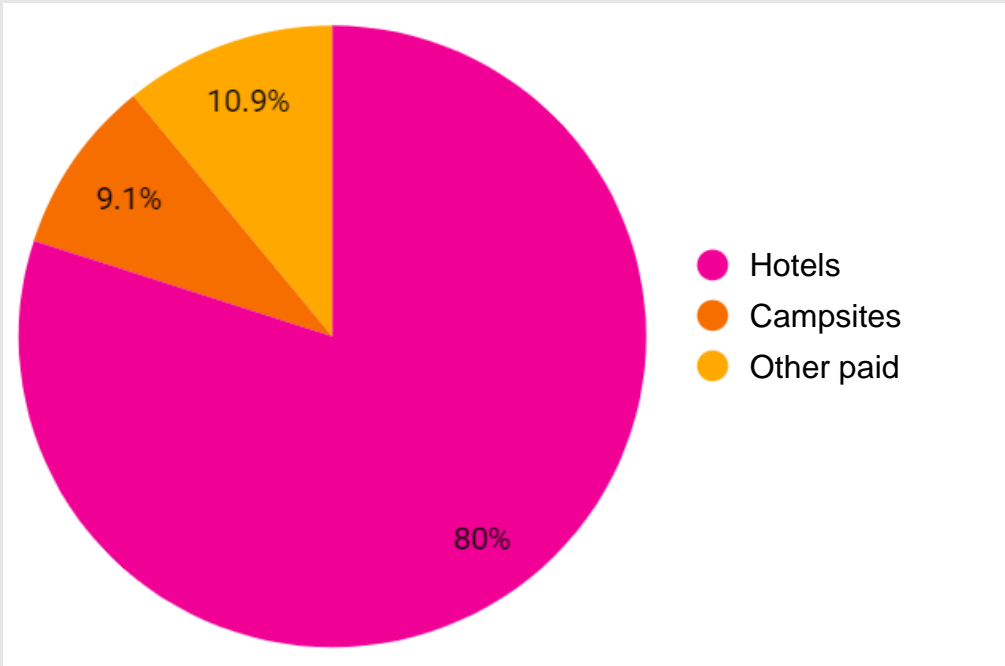
**-0.16 days** (vs. 2022)  
**-0.30 days** (vs. 2019)

# Nights & arrivals in paid accommodation

## Type of accommodation, 2023



### Nights, paid accommodation, 2023



**Hotels** 31,103

+15% (vs. 2022) +61% (vs. 2019)

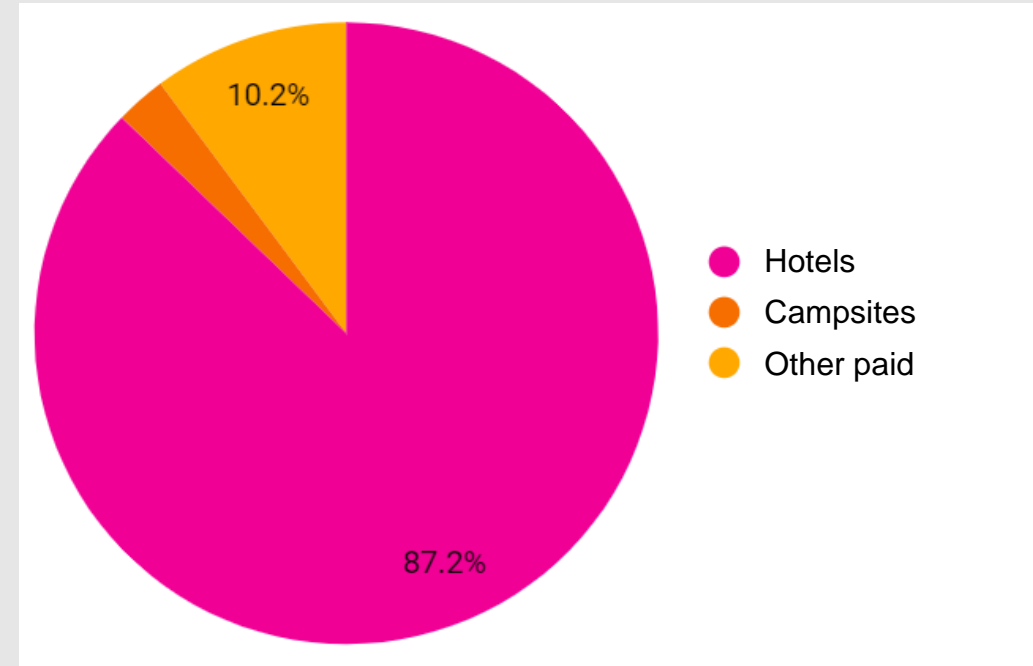
**Other paid accomm.** 4,249

-12% (vs. 2022) +39% (vs. 2019)

**Campsites** 3,536

-43% (vs. 2022) -54% (vs. 2019)

### Arrivals, paid accommodation, 2023



**Hotels** 15,247

+13% (vs. 2022) +52% (vs. 2019)

**Other paid accomm.** 1,778

-13% (vs. 2022) +21% (vs. 2019)

**Campsites** 458

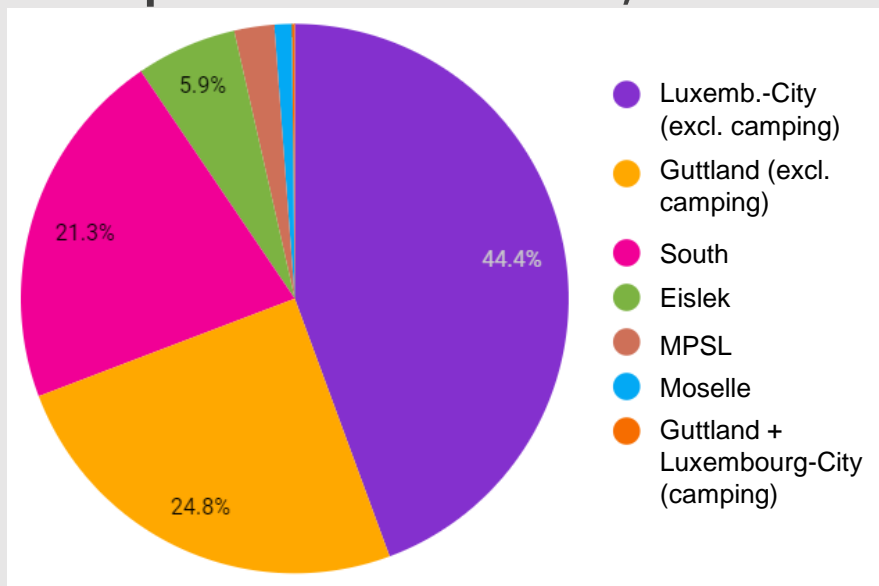
-5% (vs. 2022) -1% (vs. 2019)

# Nights & arrivals in paid accommodation

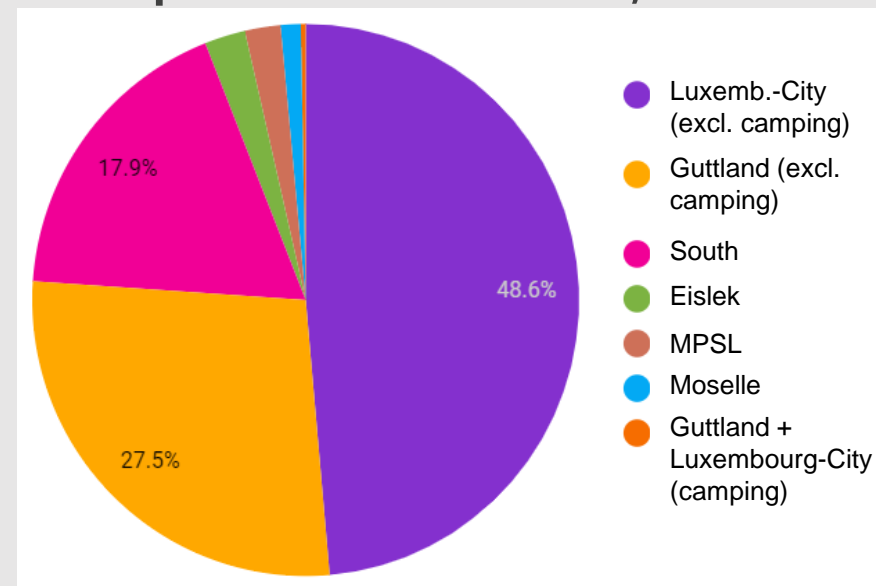
## Regions, 2023



### Nights, paid accommodation, 2023



### Arrivals, paid accommodation, 2023



<b>Lux.-City</b> (excl. camping)	<b>17.255</b>	<b>+16%</b> (vs. 2022) <b>+52%</b> (vs. 2019)
<b>Guttland</b> (excl. camping)	<b>9.663</b>	<b>+28%</b> (vs. 2022) <b>+189%</b> (vs. 2019)
<b>South</b>	<b>8.277</b>	<b>-15%</b> (vs. 2022) <b>+16%</b> (vs. 2019)
<b>Eislek</b>	<b>2.309</b>	<b>-50%</b> (vs. 2022) <b>-68%</b> (vs. 2019)
<b>MPSL</b>	<b>919</b>	<b>-3%</b> (vs. 2022) <b>+77%</b> (vs. 2019)
<b>Moselle</b>	<b>397</b>	<b>+27%</b> (vs. 2022) <b>-35%</b> (vs. 2019)
<b>Guttland/Lux.-City</b> (camping)	<b>68</b>	<b>-58%</b> (vs. 2022) <b>-20%</b> (vs. 2019)

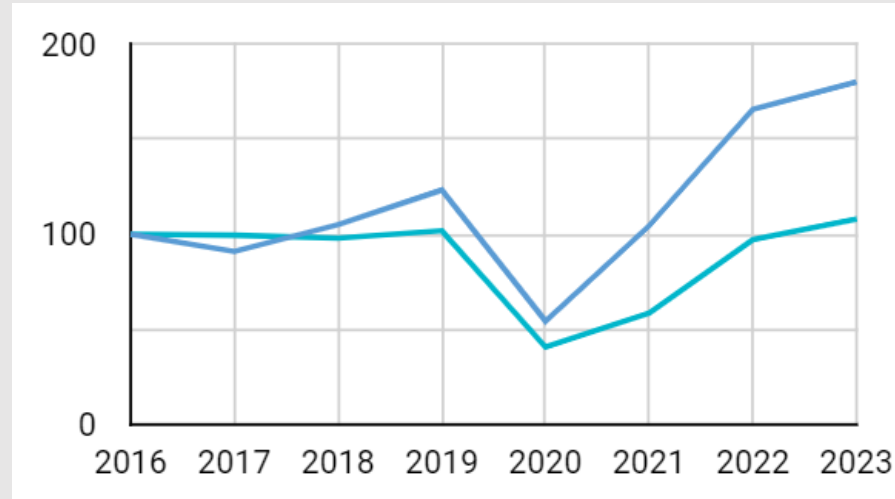
<b>Lux.-City</b> (excl. camping)	<b>8.497</b>	<b>+11%</b> (vs. 2022) <b>+52%</b> (vs. 2019)
<b>Guttland</b> (excl. camping)	<b>4.805</b>	<b>+15%</b> (vs. 2022) <b>+159%</b> (vs. 2019)
<b>South</b>	<b>3.134</b>	<b>-1%</b> (vs. 2022) <b>-7%</b> (vs. 2019)
<b>Eislek</b>	<b>421</b>	<b>-17%</b> (vs. 2022) <b>-36%</b> (vs. 2019)
<b>MPSL</b>	<b>369</b>	<b>+4%</b> (vs. 2022) <b>+85%</b> (vs. 2019)
<b>Moselle</b>	<b>207</b>	<b>+23%</b> (vs. 2022) <b>-14%</b> (vs. 2019)
<b>Guttland/Lux.-City</b> (camping)	<b>50</b>	<b>-11%</b> (vs. 2022) <b>+4%</b> (vs. 2019)

# Arrivals in paid accommodation

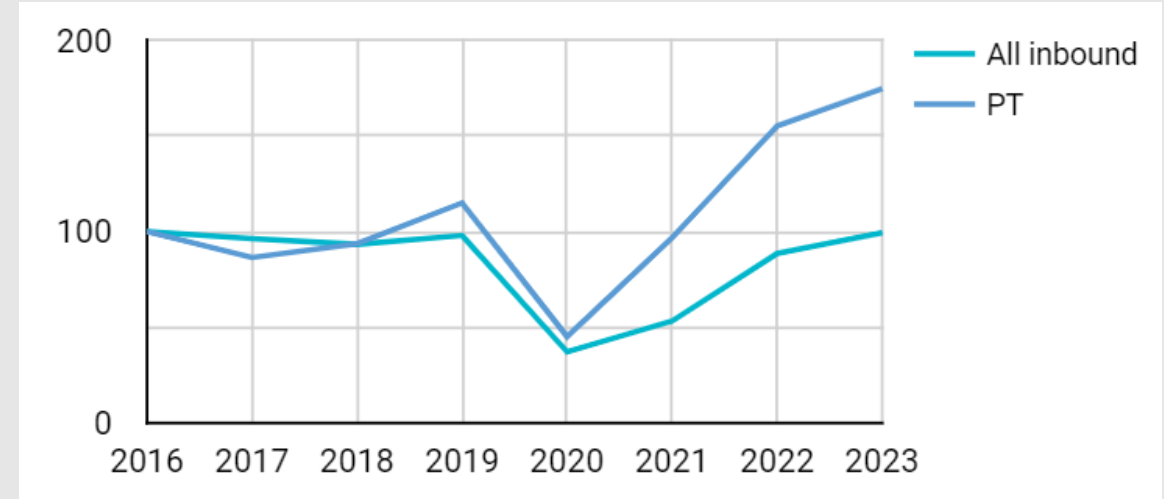
## Trends 2016-2023



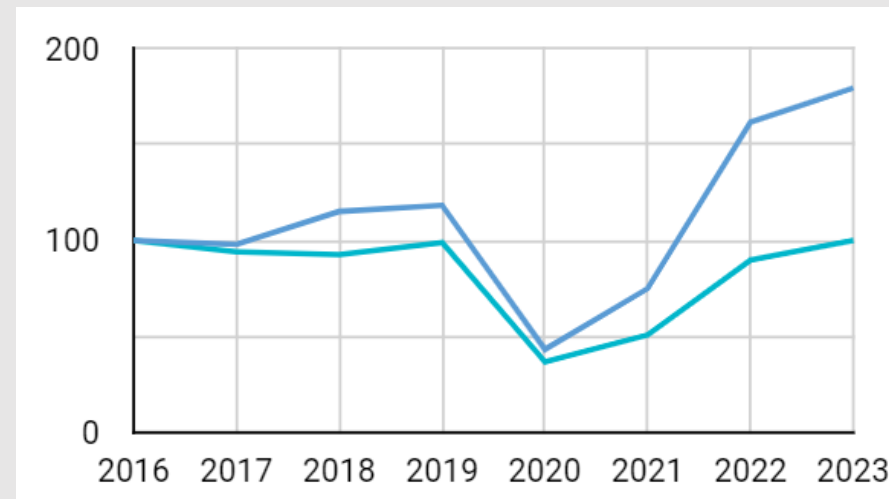
All paid accommodation, national (2016 = Index 100)



Hotels, national (2016 = Index 100)



All paid accommodation (\*), Luxembourg City (2016 = Index 100)



(\*), excluding camping.  
Source: Statec

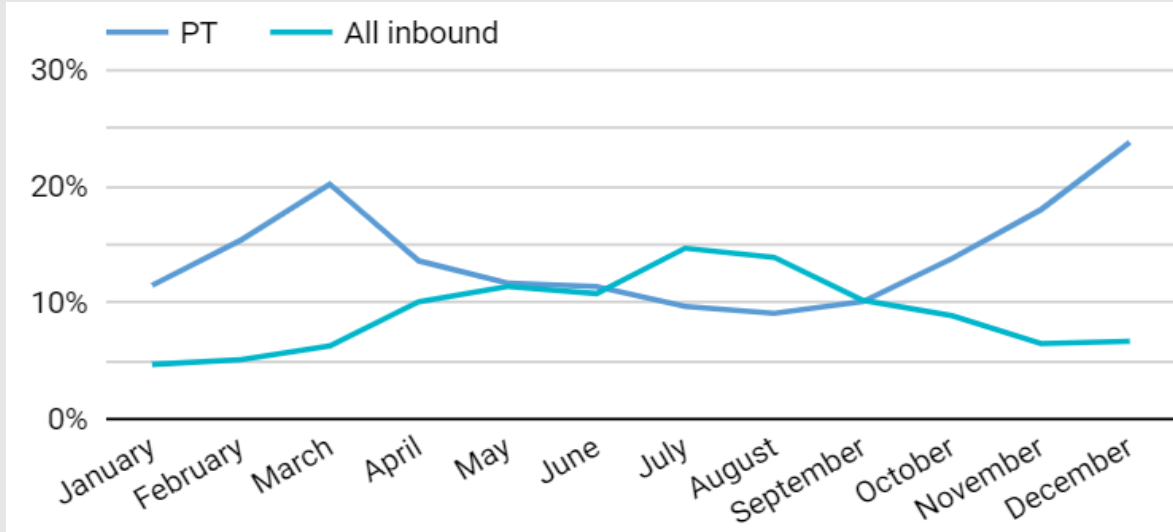


# Arrivals in paid accommodation

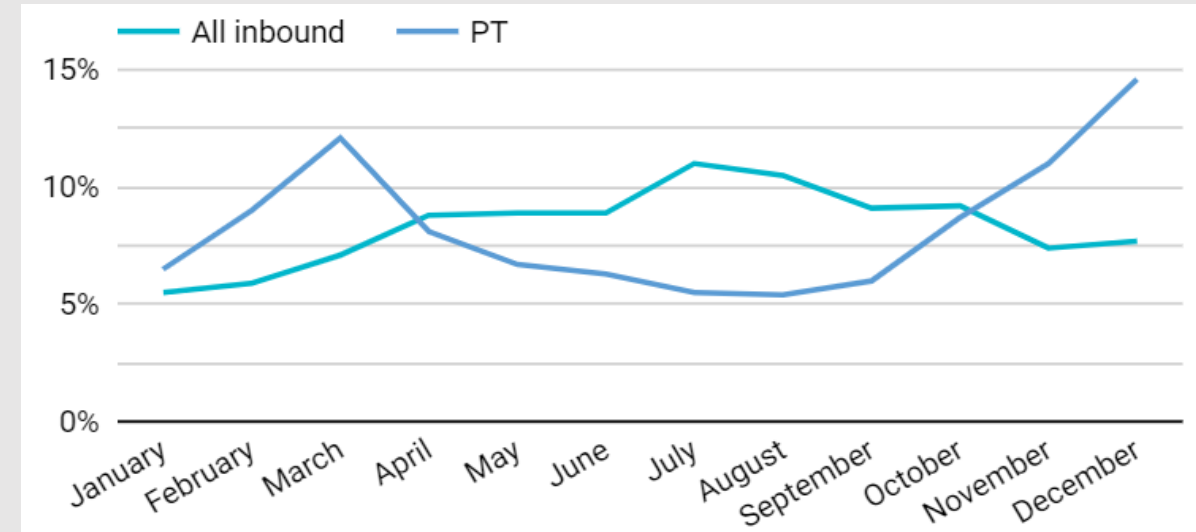
## Seasonality



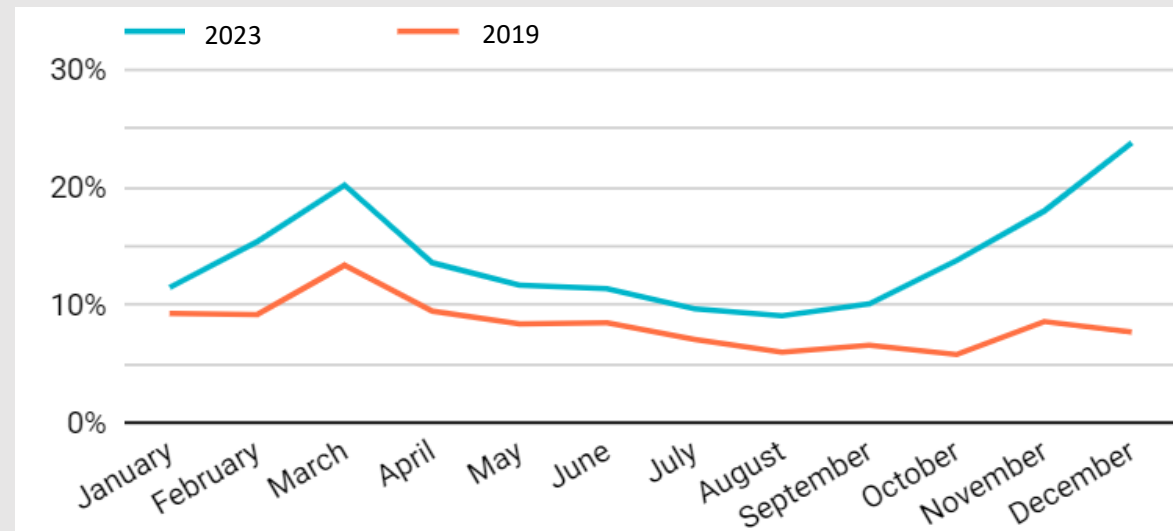
### All paid accommodation, 2023



### Hotels, 2023



### All paid accommodation, arrivals from Portugal



# Short-term rentals

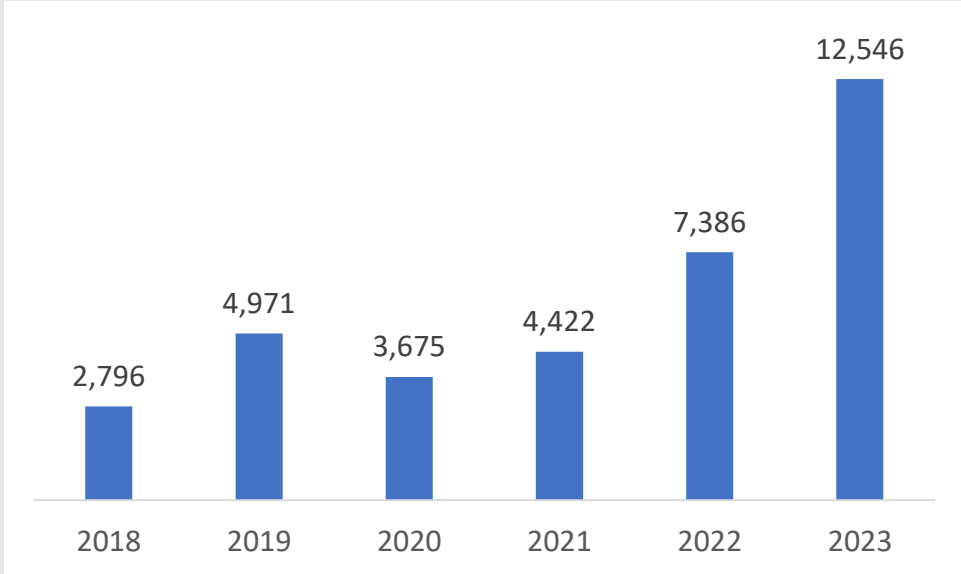


**Nights,  
Short-term rentals, 2023**



**+70% (vs. 2022)**  
**+152% (vs. 2019)**

**Nights,  
Short-term rentals, 2018-2023**



Source: Eurostat (experimental statistics).



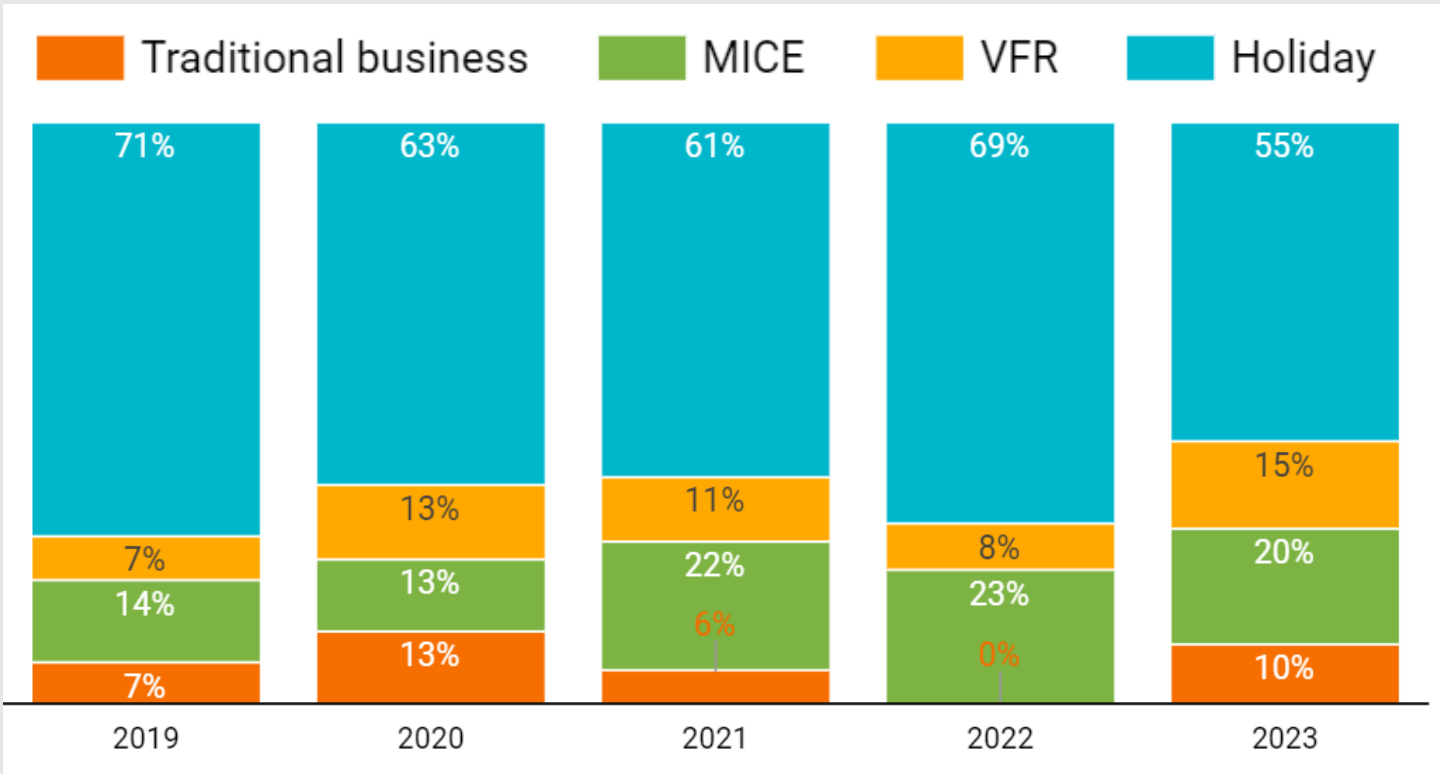
# **Characteristics of Portuguese inbound trips to Luxembourg**

# Portuguese trips to Luxembourg with overnight (all accommodation)



## Purpose of visit, 2019-2023

Portuguese trips to Luxembourg, 2019-2023



### 2023

	Portugal to Luxembourg	Europe to Luxembourg
Holiday	55%	62%
VFR	15%	15%
MICE	20%	14%
Traditional Business	10%	9%

Source: World Travel Monitor/IPK International.



# **Travel behaviour of Portuguese leisure visitors in Luxembourg**

# Holiday types

## Inbound leisure visitors with overnight, 2022-2023



Portugal

All inbound

### Main holiday types

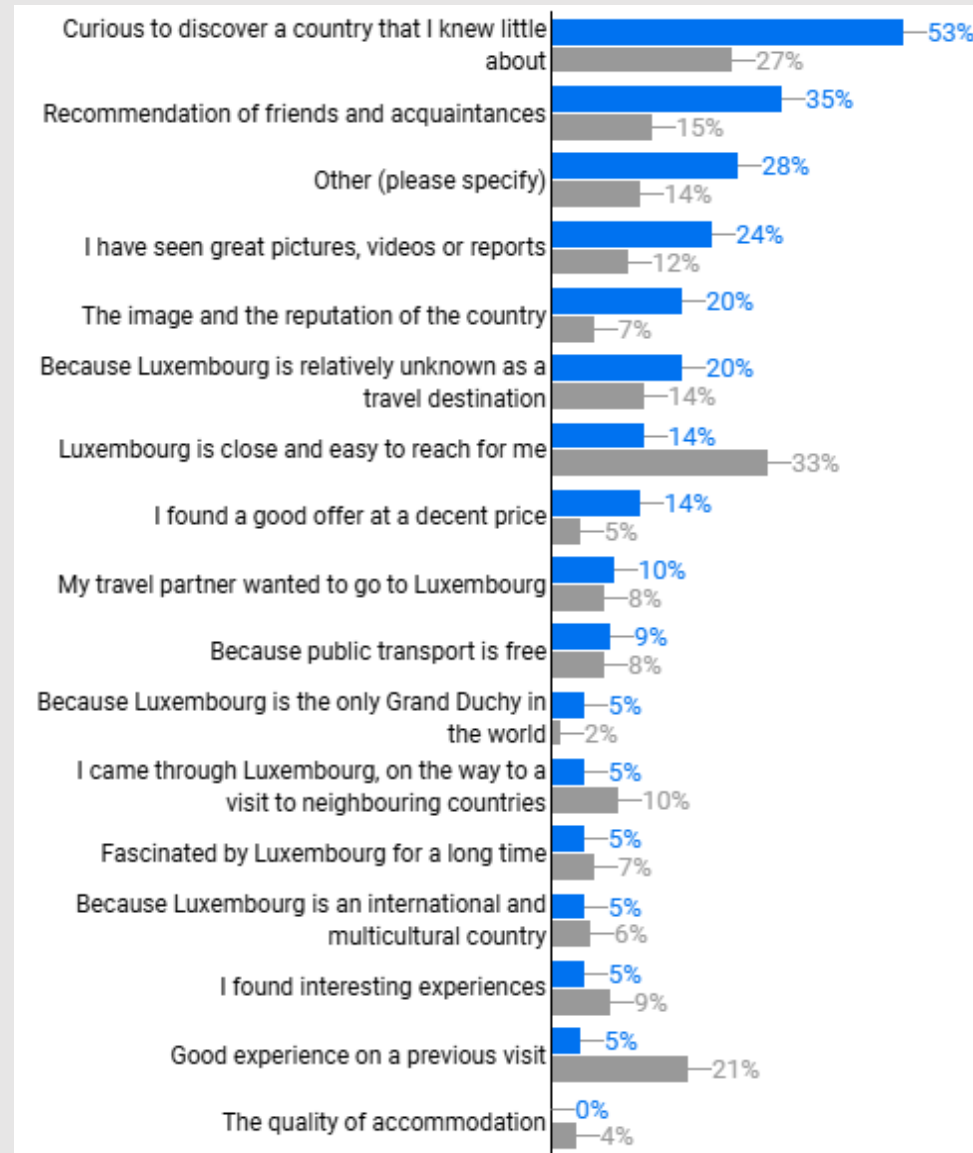
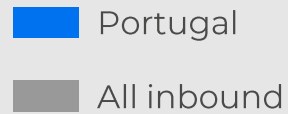


### Additional holiday types



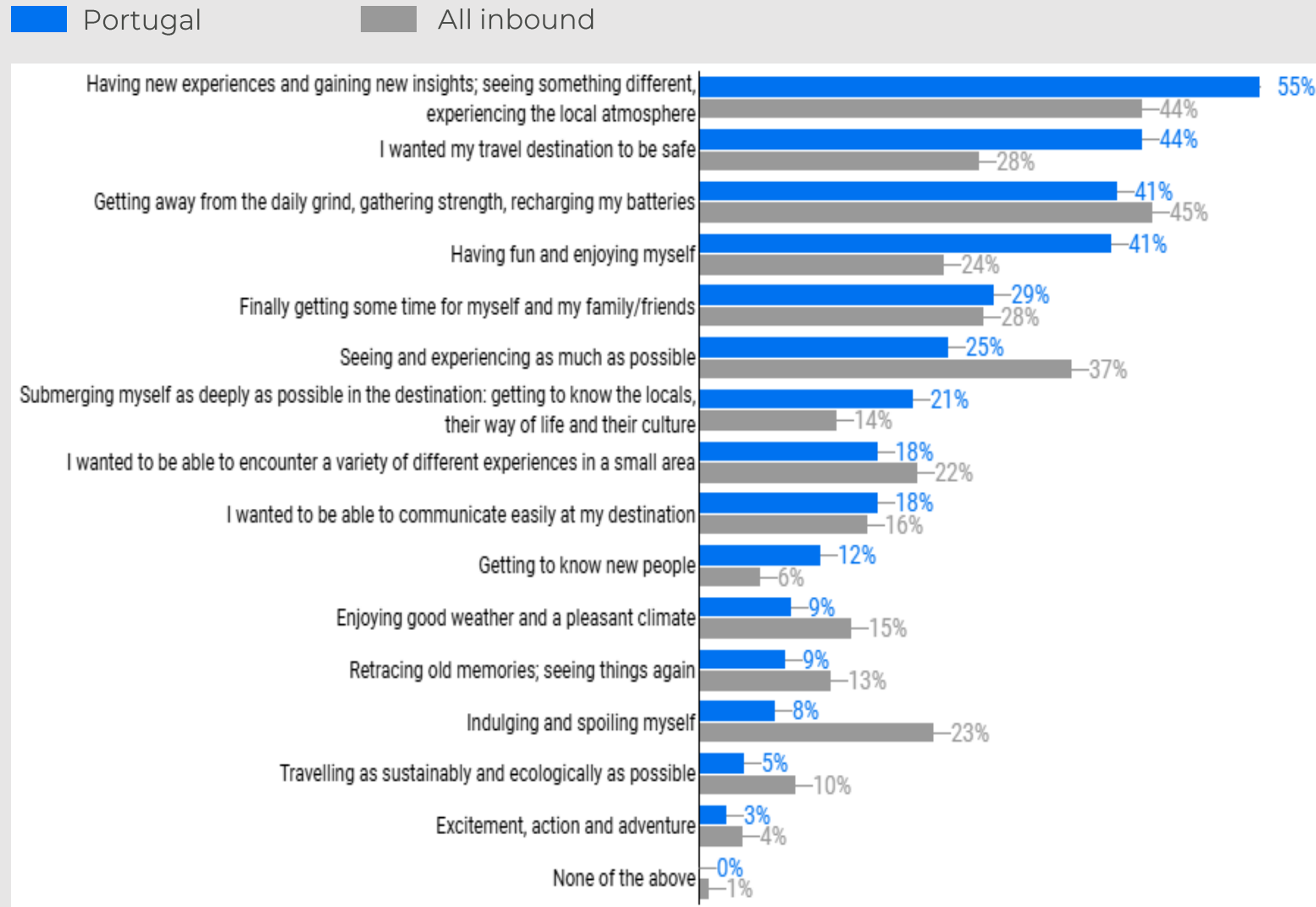
# Key decision criteria for choosing Luxembourg

## Inbound leisure visitors with overnight (\*), 2022-2023



# Key travel motivations

## Inbound leisure visitors with overnight, 2022-2023

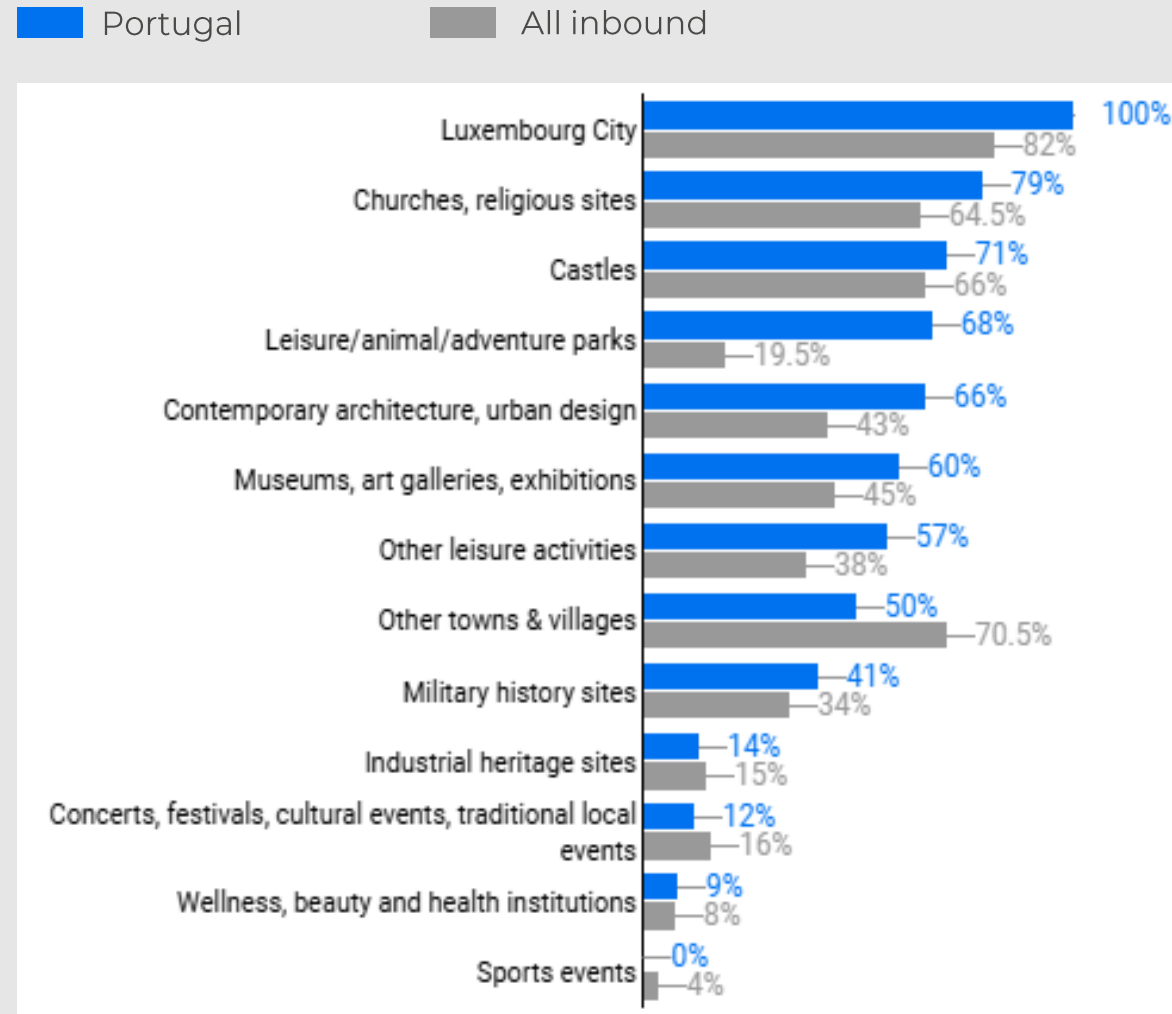






# Type of places visited in Luxembourg

## Inbound leisure visitors with overnight, 2022-2023

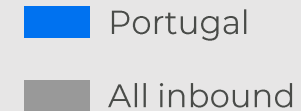
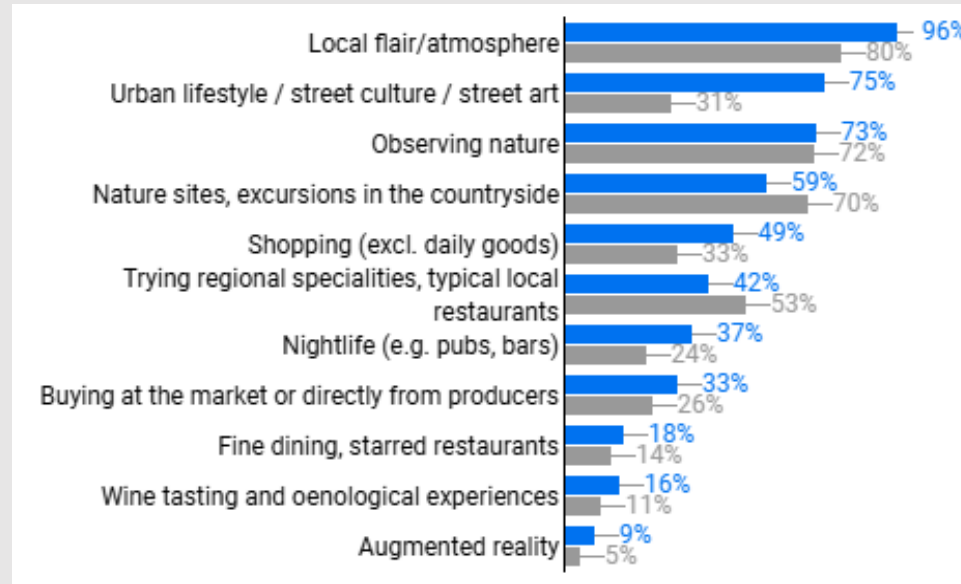


# Activities undertaken in Luxembourg

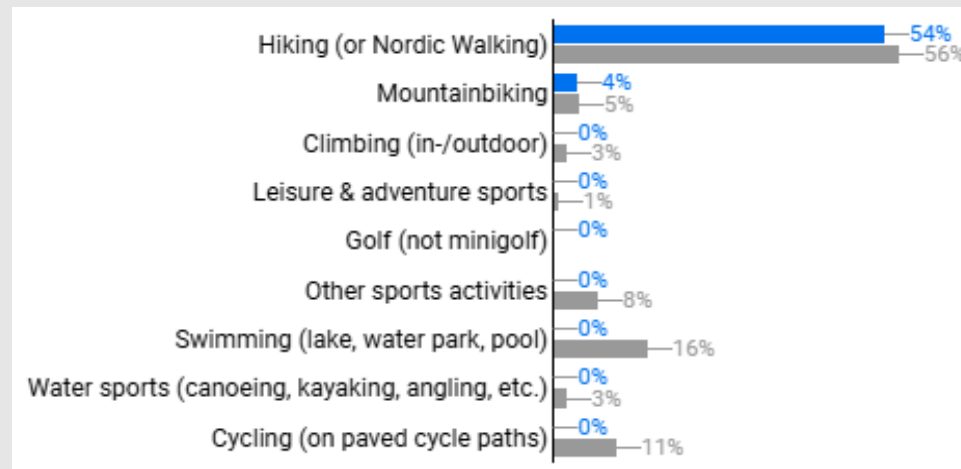
Inbound leisure visitors with overnight, 2022-2023



## Non-sporting activities



## Sporting activities



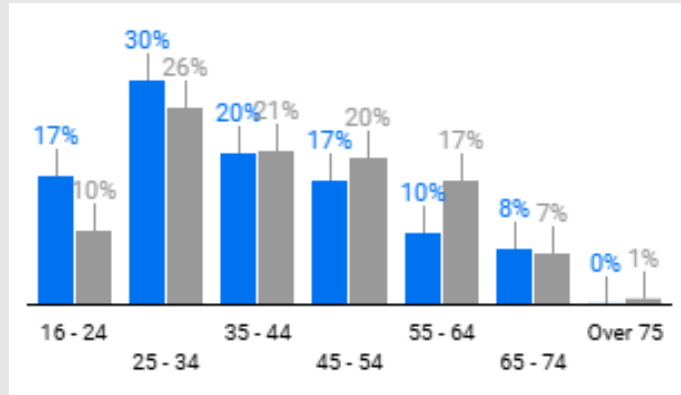
# Transport, travel party, age, repeat visits and cross-border trips

## Inbound leisure visitors with overnight, 2022-2023

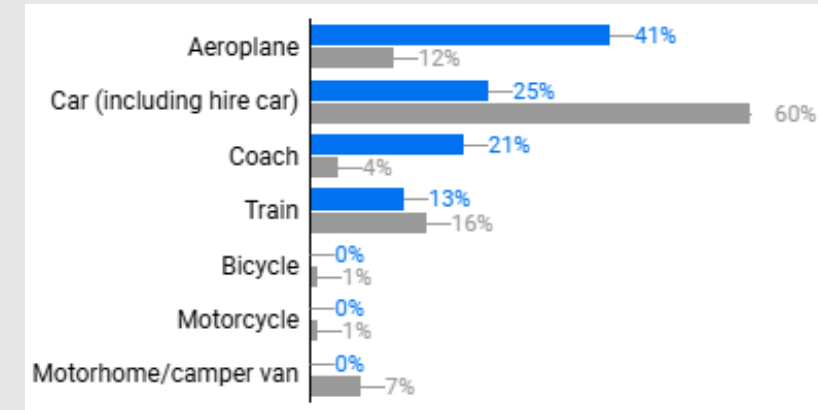


Portugal (blue square) All inbound (grey square)

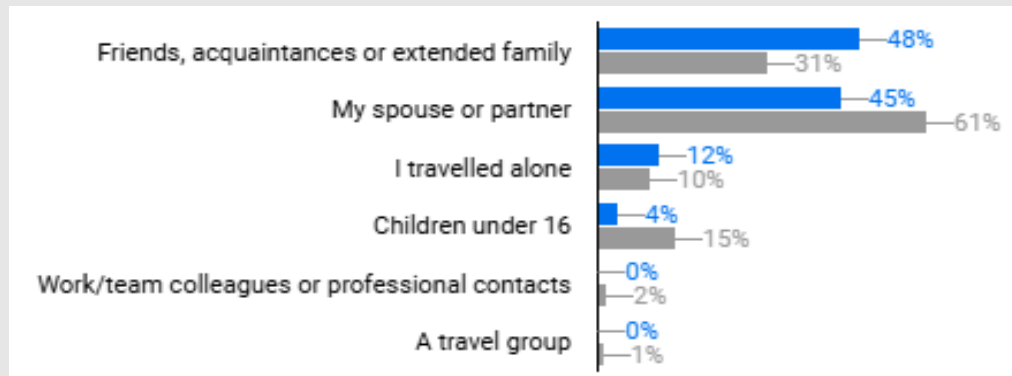
Age groups



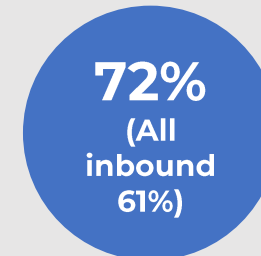
Mode of transport to access Luxembourg



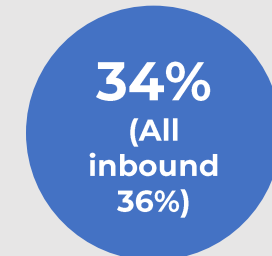
Travel party



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

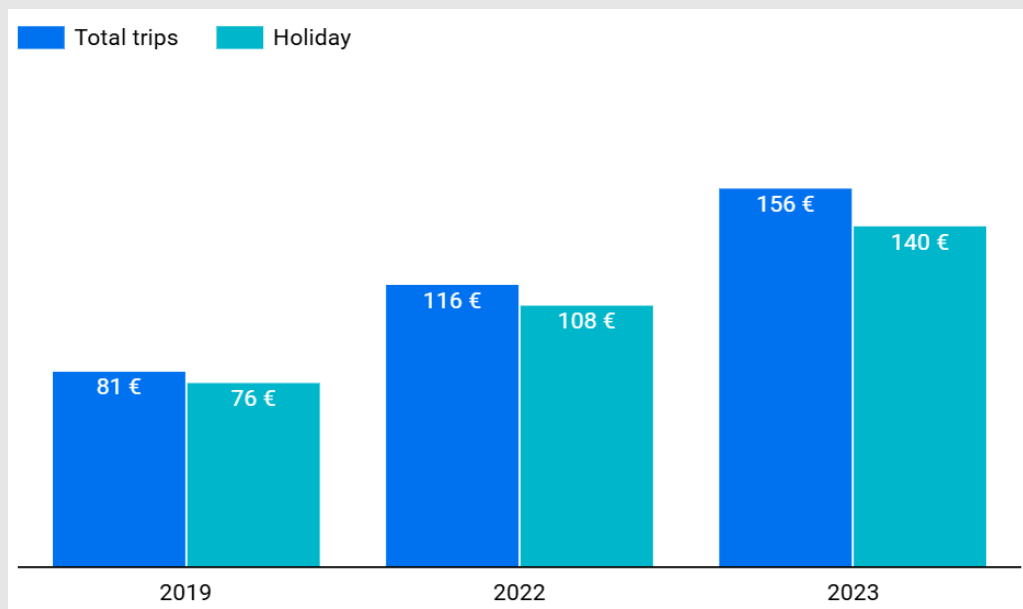


# Expenditure

## Inbound trips to Luxembourg with overnight



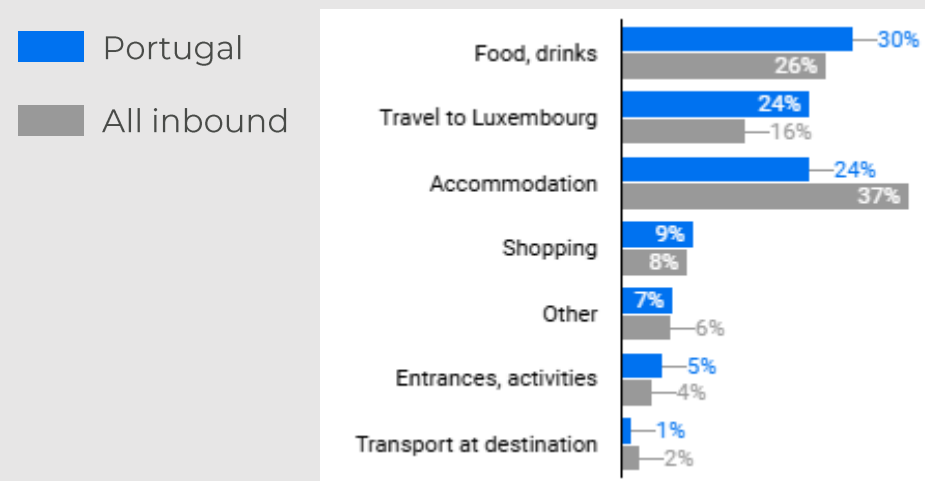
### Portuguese trips to Luxembourg : average spend per pers. per day



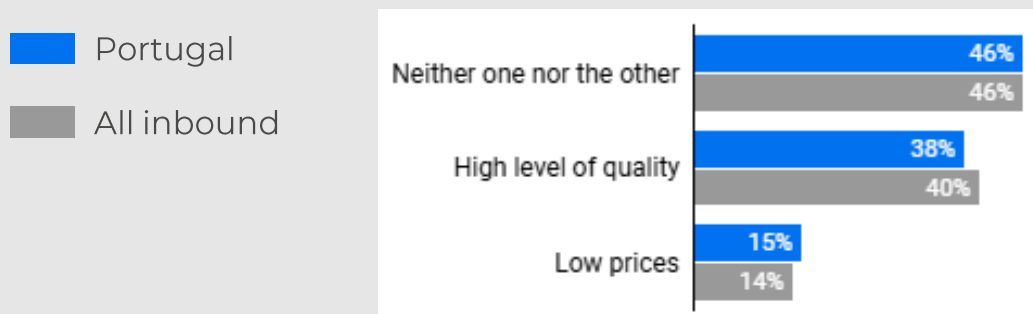
### 2023

	Portugal to Luxembourg	Europe to Luxembourg
Spend/day/pers. on <b>all</b> trips	156 €	152 €
Spend/day/pers. on <b>holiday</b> trips	140 €	144 €

### Expenditure of leisure inbound overnight visitors by categories, 2022-2023



### Quality vs. price orientation

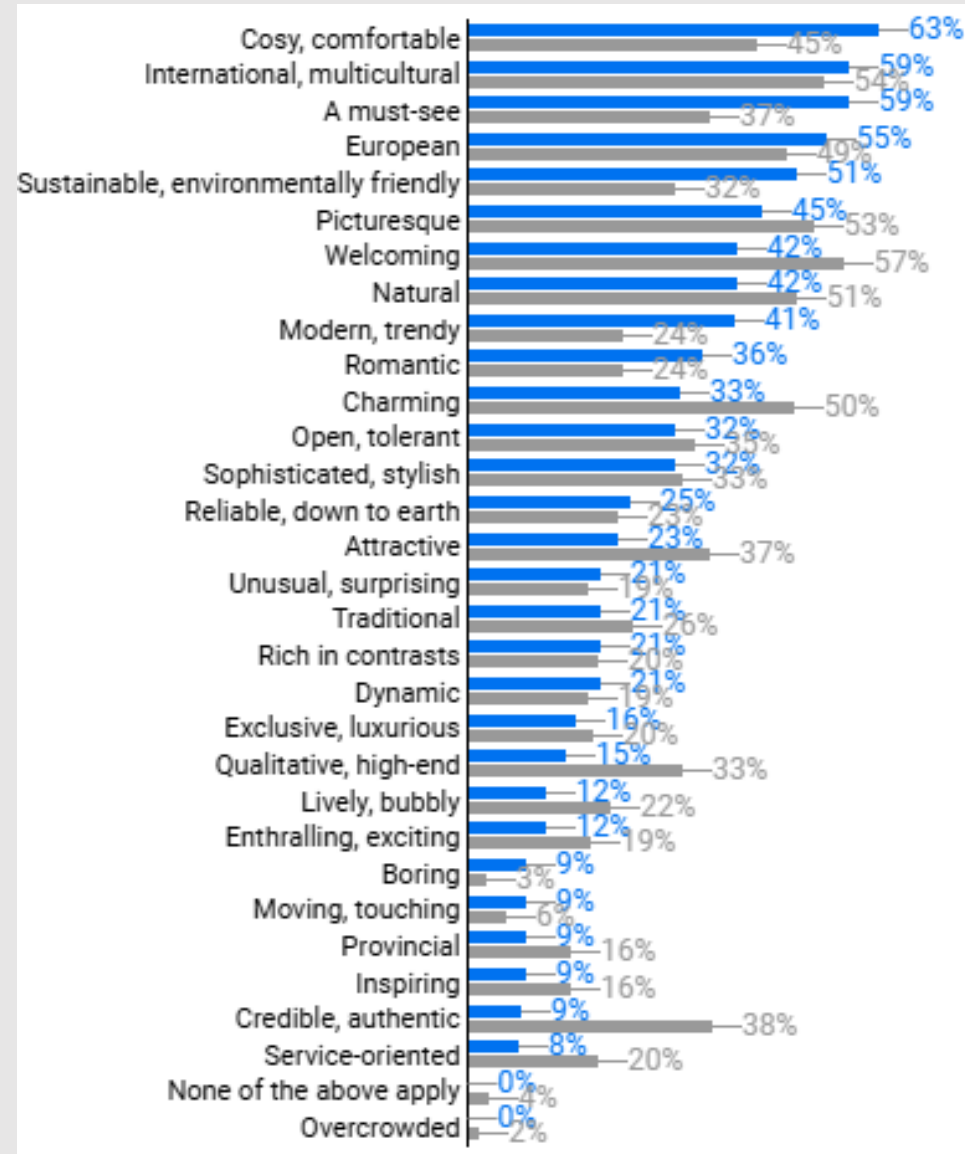


# Image perception of Luxembourg

Inbound leisure visitors with overnight, 2022-2023

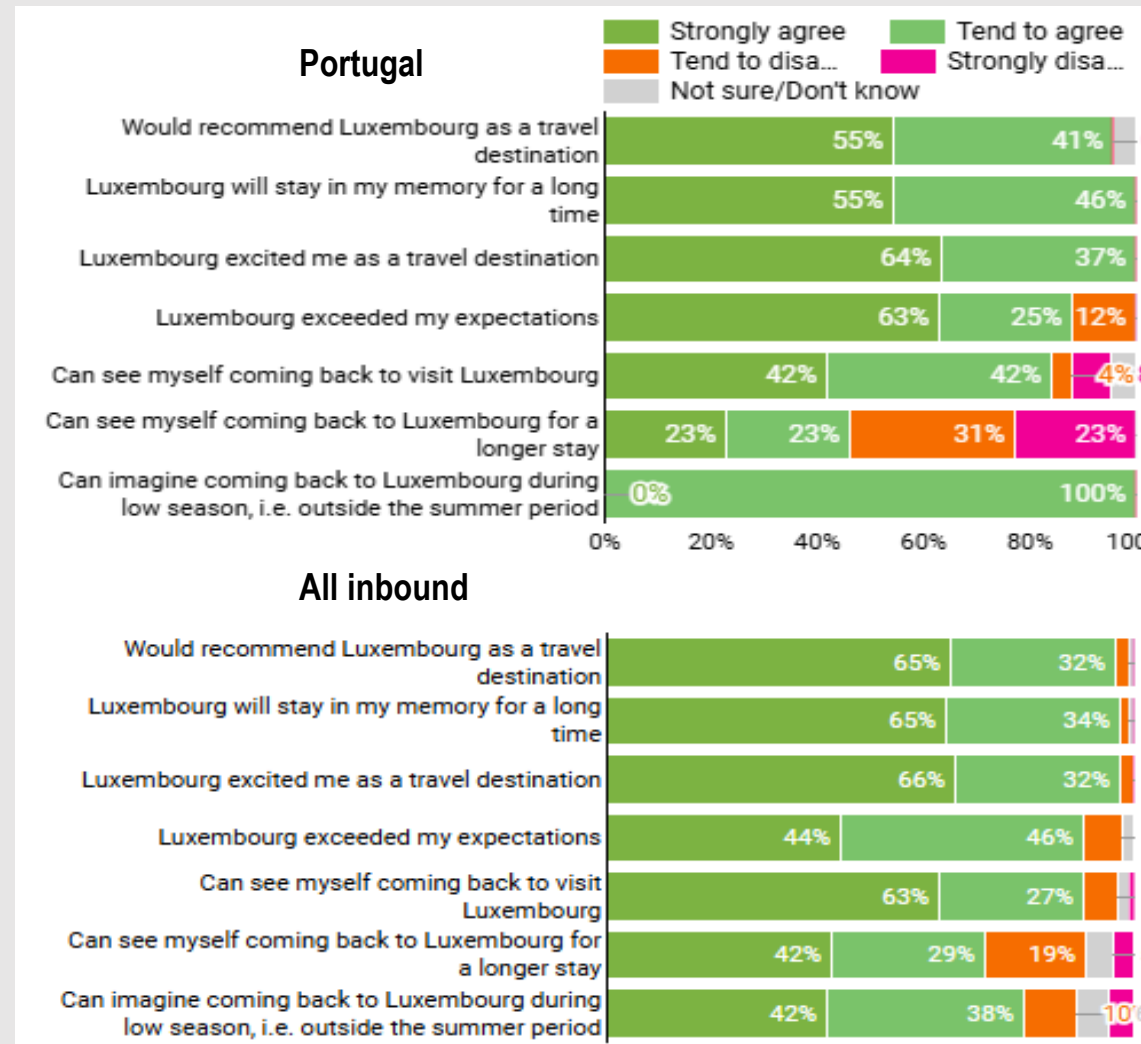


Portugal  
All inbound



# Visitor satisfaction and recommendation

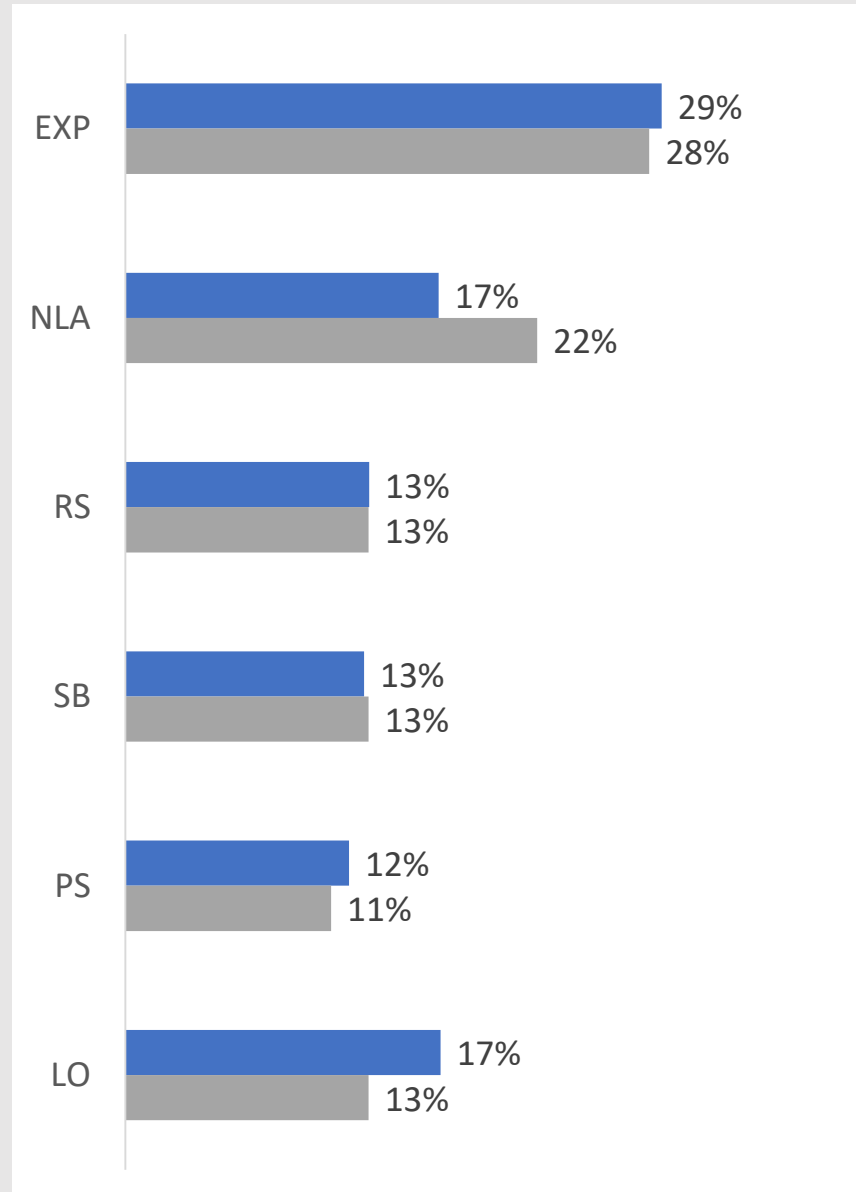
## Inbound leisure visitors with overnight, 2022-2023



# LFT Target Segments



- Explorers**
- Nature-Loving Actives**
- Relaxation Seekers**
- Short Breakers**
- Perfection Seekers**
- Leisure-Oriented**



Portugal  
All inbound

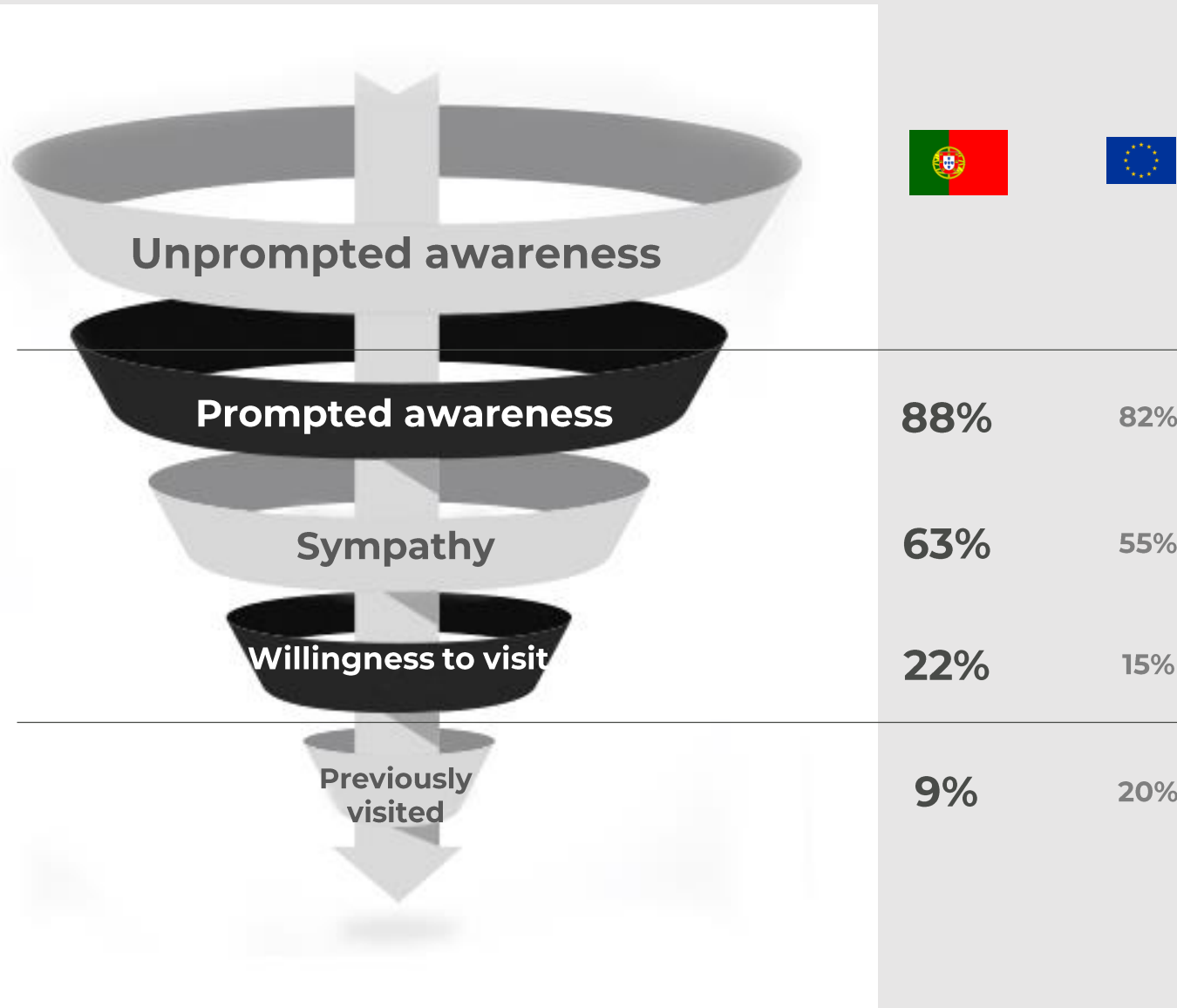


# **Brand strength & Growth potential**



# Brand Funnel 2024

Assessing Luxembourg's brand strength as a destination

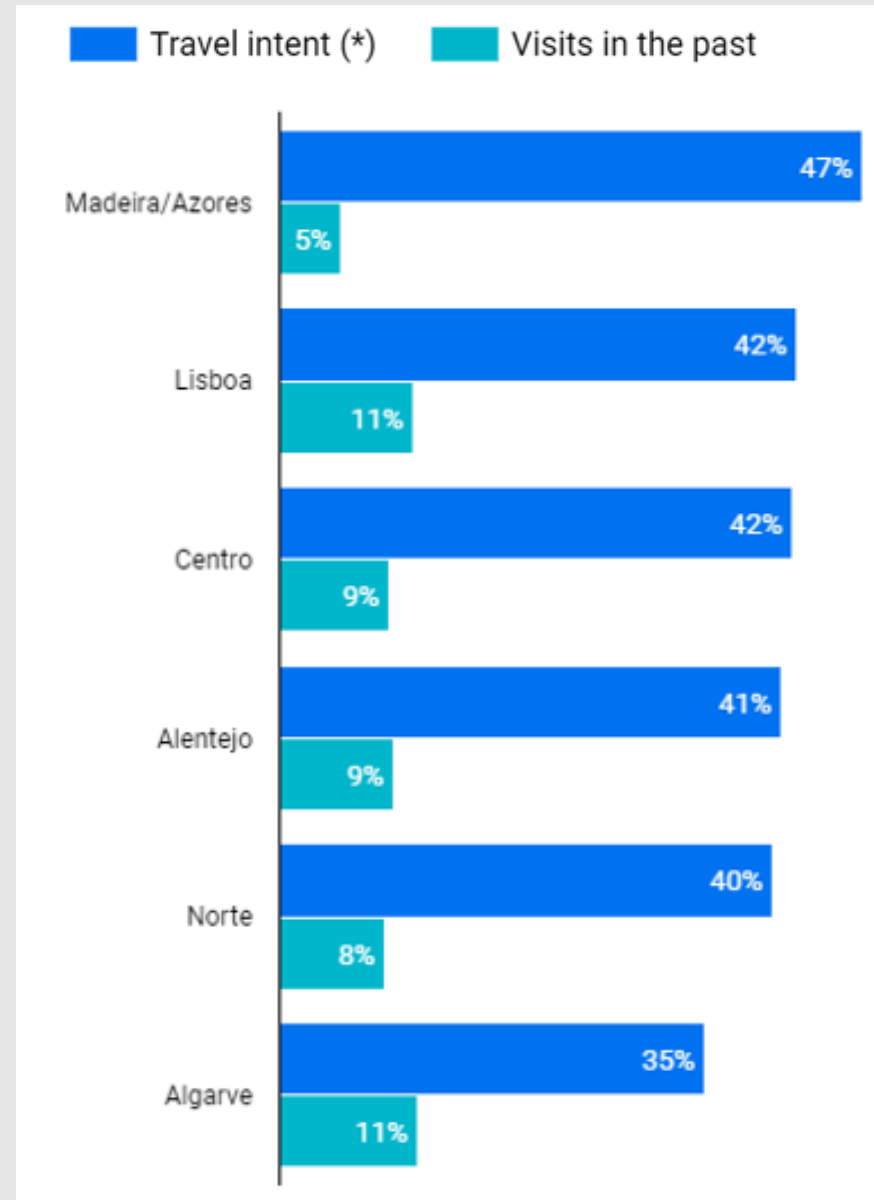


**Core future visitor potential from Portugal (\*)**  
1.7 million

Source: LFT Brand & Potential Study.  
(\*) Based on travel intent for next 3 years.

# Regional origin 2024

Past visitors and future potential



# General theme interest (\*)



Theme			
	Rank	Rank	% interested
<b>Culinary</b>	2	<b>1</b>	77%
<b>Resting/Relaxation</b>	1	<b>2</b>	77%
<b>Family</b>	12	<b>3</b>	77%
<b>Nature</b>	3	<b>4</b>	77%
<b>Culture</b>	11	<b>5</b>	74%
<b>Wellness</b>	25	<b>6</b>	73%
<b>History/Unesco</b>	10	<b>7</b>	72%
<b>Sustainability</b>	15	<b>8</b>	72%
<b>City</b>	5	<b>9</b>	71%
<b>Castles</b>	9	<b>10</b>	70%
<b>Travelling by train</b>	18	<b>11</b>	66%
<b>Countryside</b>	22	<b>12</b>	62%
<b>Hiking</b>	17	<b>13</b>	62%
<b>Events</b>	16	<b>14</b>	61%
<b>Nightlife (**)</b>	20	<b>15</b>	60%
<b>Wine</b>	21	<b>16</b>	55%
<b>Shopping</b>	23	<b>17</b>	53%
<b>Active-sports</b>	27	<b>18</b>	52%
<b>Industrial heritage</b>	28	<b>19</b>	50%
<b>Luxury</b>	24	<b>20</b>	50%
<b>Camping</b>	29	<b>21</b>	45%
<b>MTB</b>	32	<b>22</b>	33%
<b>Cycling</b>	31	<b>23</b>	30%
<b>Motorcycling</b>	33	<b>24</b>	25%




(\*) 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
Family	7	<b>1</b>	50%
Resting/Relaxation	2	<b>2</b>	49%
Culture	5	<b>3</b>	48%
Culinary	3	<b>4</b>	44%
Wellness	13	<b>5</b>	43%
History/Unesco	10	<b>6</b>	42%
Nature	4	<b>7</b>	42%
City	1	<b>8</b>	38%
Castles	6	<b>9</b>	37%
Sustainability	15	<b>10</b>	33%
Nightlife (***)	11	<b>11</b>	31%
Hiking	9	<b>12</b>	29%
Shopping	8	<b>13</b>	27%
Countryside	14	<b>14</b>	26%
Wine	12	<b>15</b>	26%
Industrial heritage	19	<b>16</b>	24%
Camping	16	<b>17</b>	21%
Active-sports	18	<b>18</b>	21%
MTB	20	<b>19</b>	14%
Cycling	17	<b>20</b>	12%

## Growth potential for themes (\*\*)

- Culinary & Wine
- Nature
- Hiking
- Active-sports
- Countryside
- Cycling

(\*) 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 general theme interest in the source market, and to the theme suitability perception across other source markets (European average).

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	3	3	58%
Open-minded, tolerant	5	4	55%
Authentic	4	5	55%
Dynamic, modern	8	6	51%
Attractive, appealing	6	7	50%
Surprising	10	8	45%
Service-oriented	9	9	45%
Lot of variety, diversified	11	10	42%
Sustainable	14	11	41%
Exclusive, luxurious	7	12	38%
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





## Your contact



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