Luxembourg for Tourism

Market profile PORTUGAL 2024

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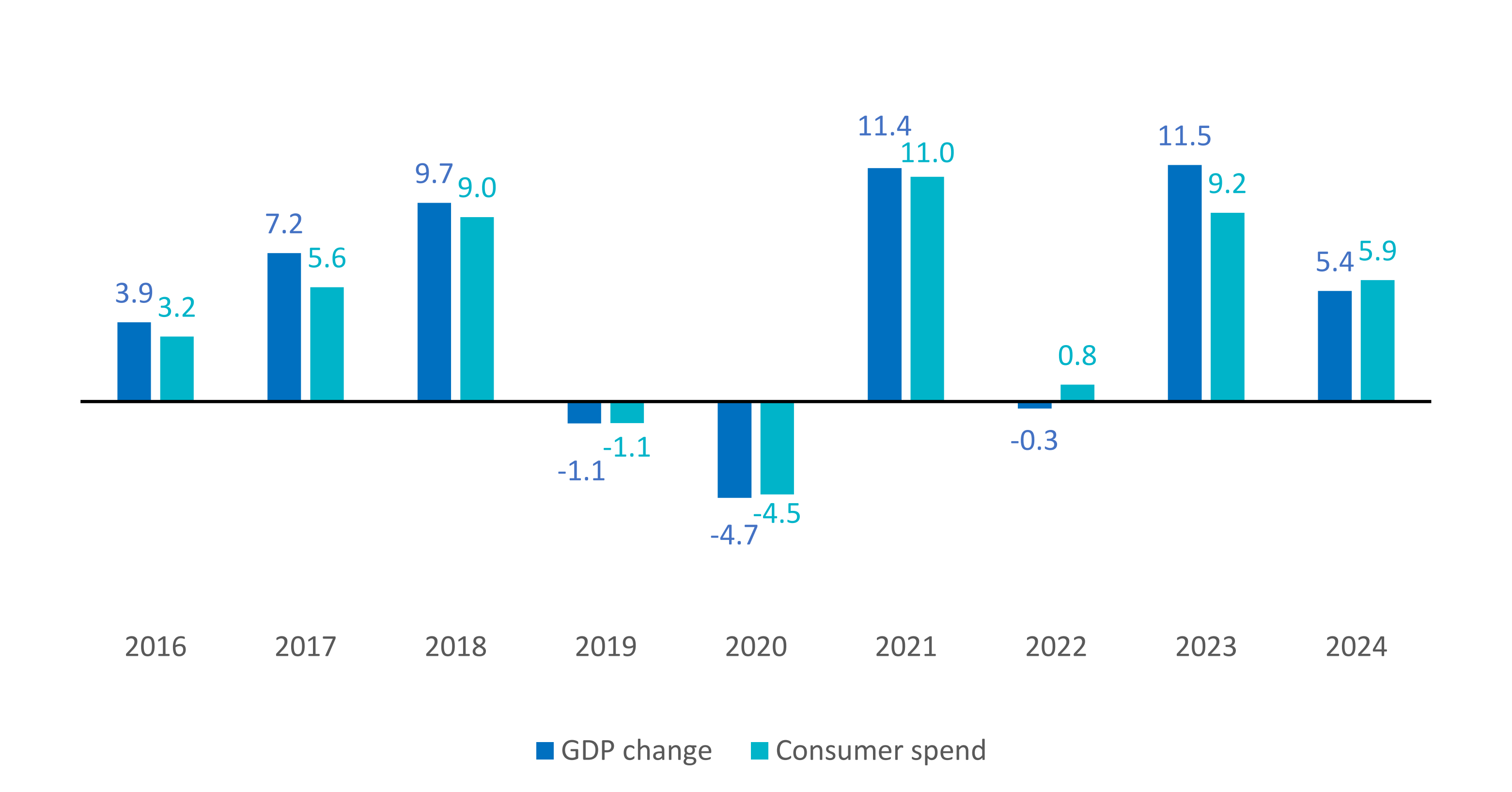
Economic indicators & General Travel Demand

Economic indicators – General travel demand

GDP and consumer spending, % annual change



Economy & population

GDP ($) per capita
28,822.17

Unemployment (%)
6.46

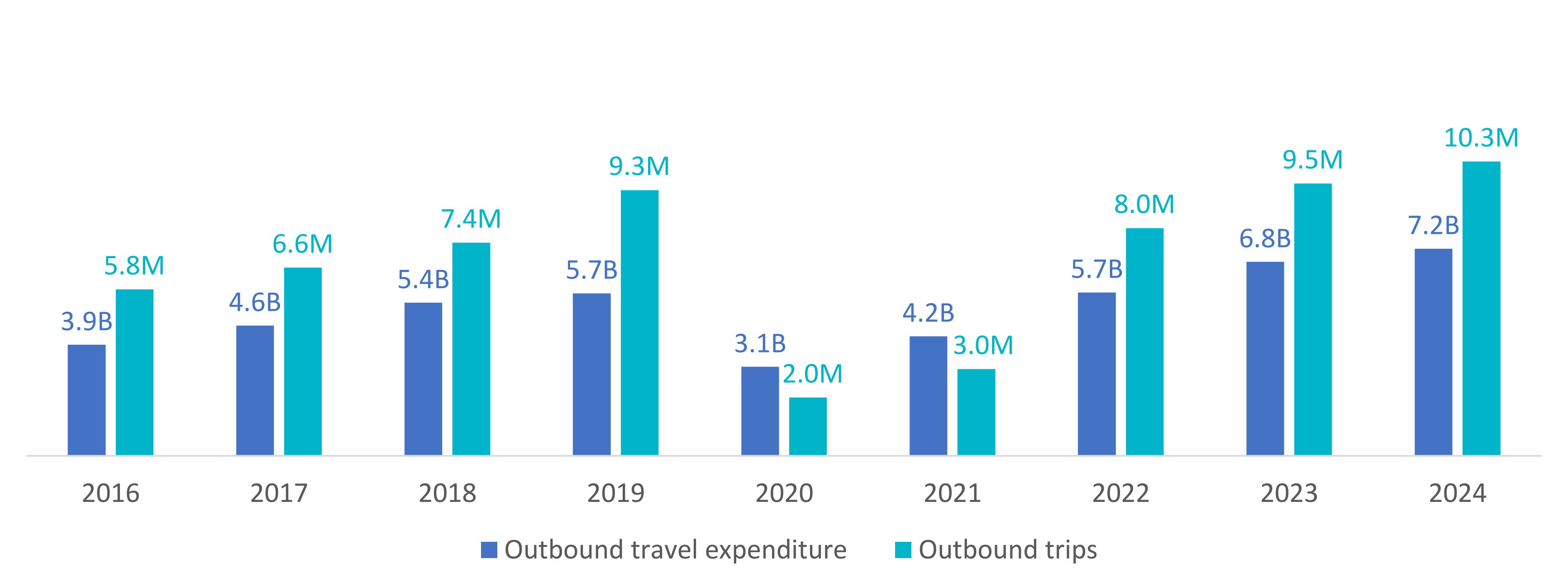
Inflation(%)
2.41

Population
10,708,280

Sources: Oxford Economics.

Economic indicators – General travel demand

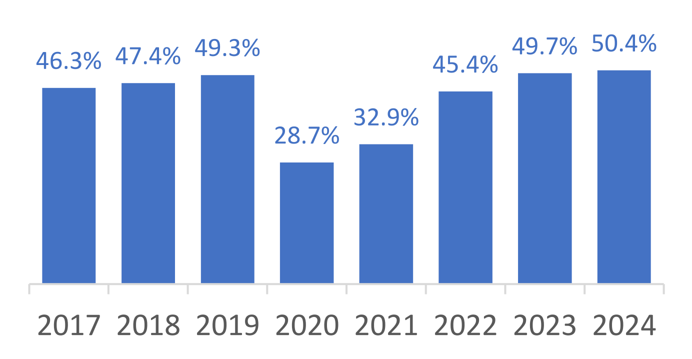
Outbound trips and travel expenditure



Outbound travel intensity
0.96 trips
per inhabitant (2024)

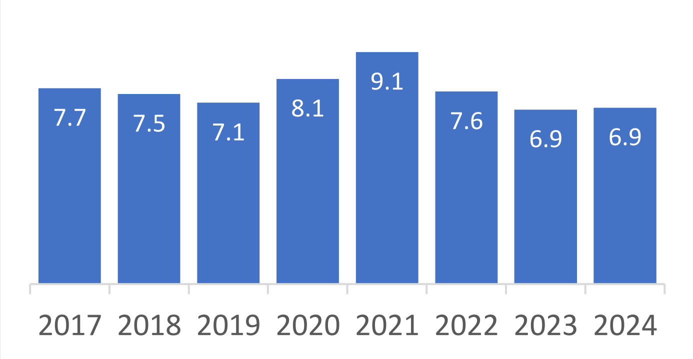
Average spend
per outbound trip (2024)
704 $

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2024)
83.4%

Average length of stay,
nights, all outbound trips



Share of short trips
(1-3 nights),
% all outbound
trips (2024)
29.9%

Sources: Eurostat, Oxford Economics.

Arrivals & nights in paid accommodation

Nights in paid accommodation

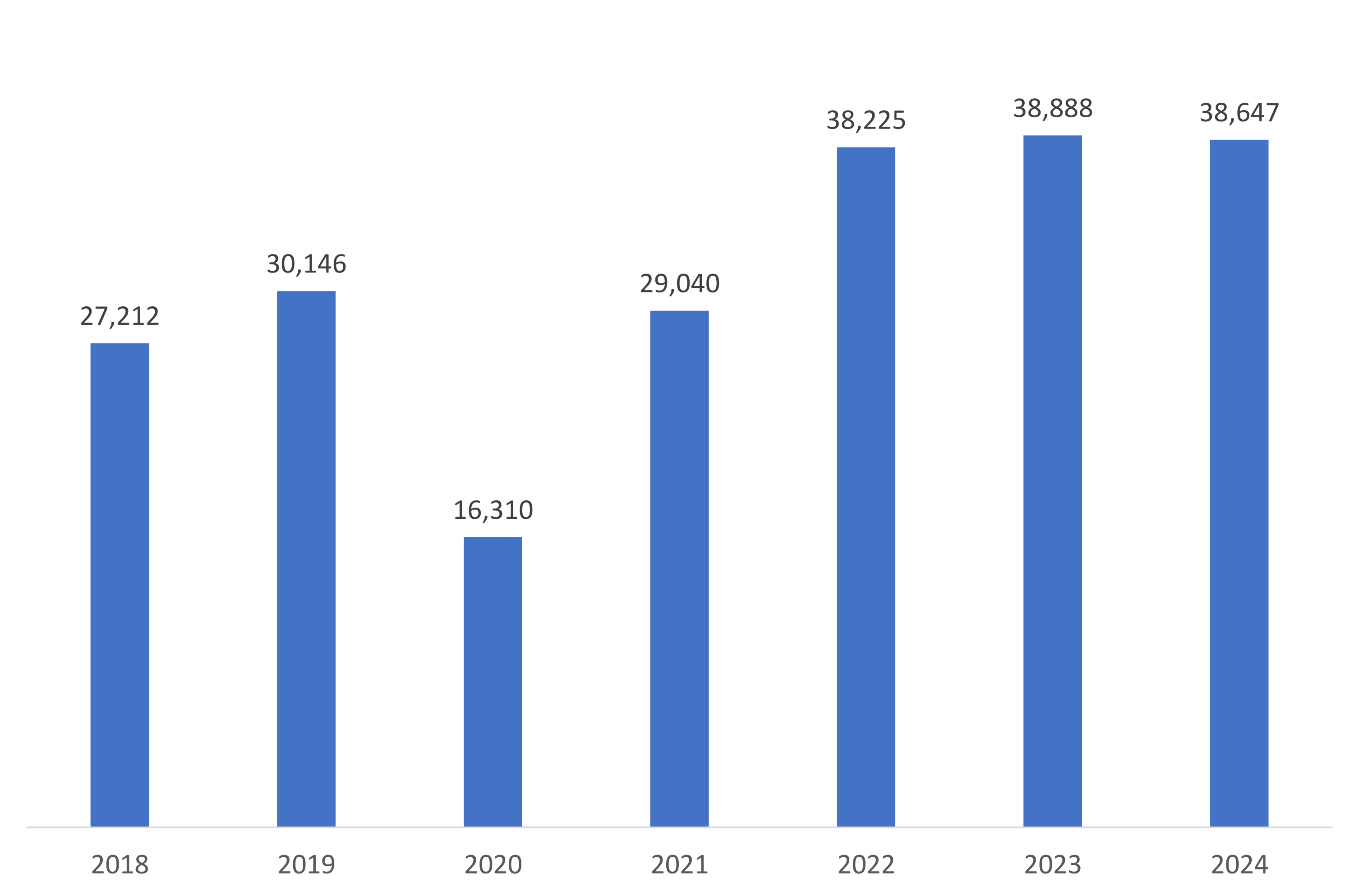
2024 and 2018-2024

Nights,
paid accommodation, 2024

38.647

-1% (vs. 2023)

+28% (vs. 2019)



Source: Statec

Arrivals in paid accommodation

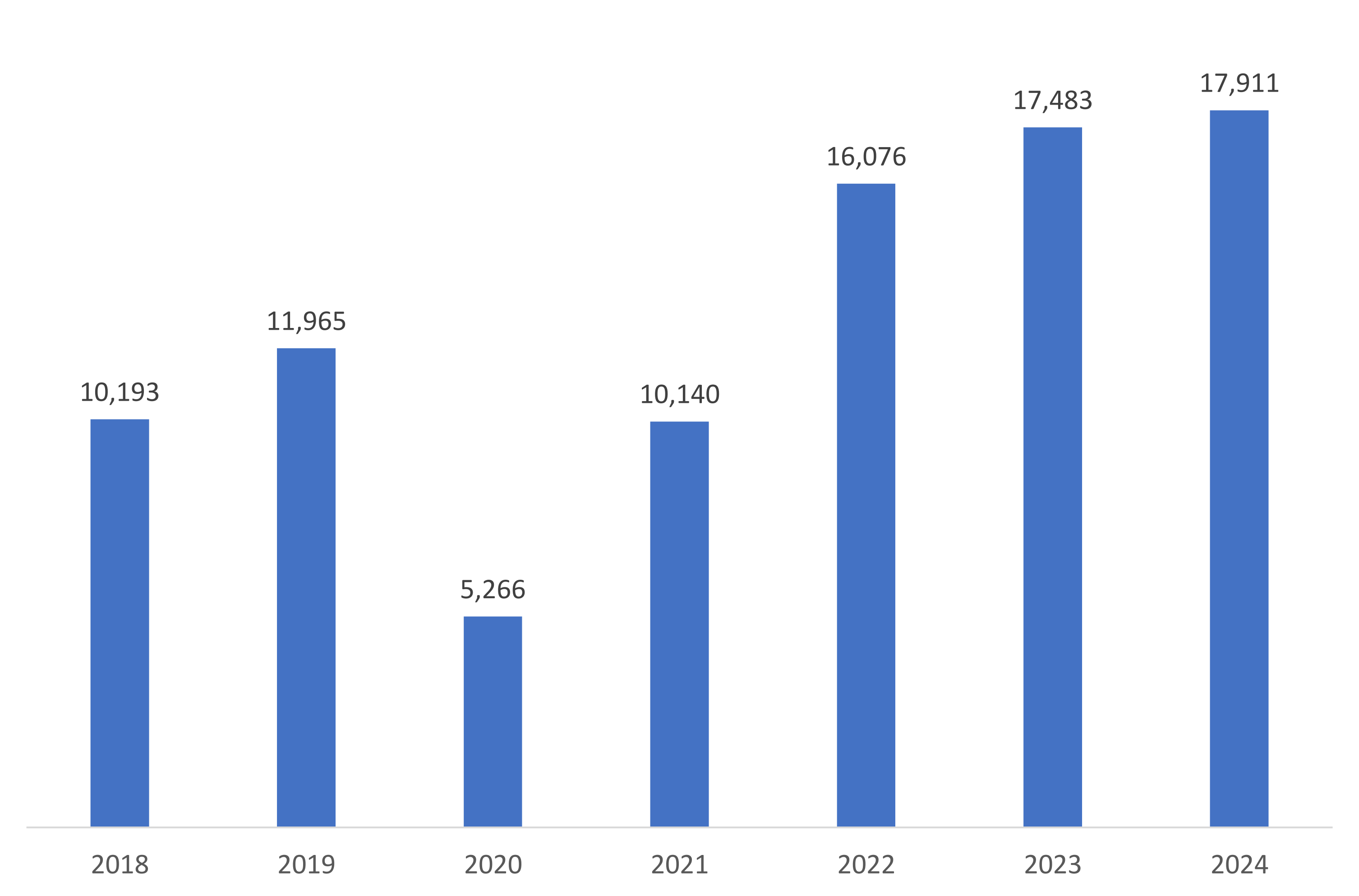
2024 and 2018-2024

Arrivals, paid accommodation, 2024

17.911

+2% (vs. 2023)

+50% (vs. 2019)



Source: Statec

Length of stay, paid accommodation

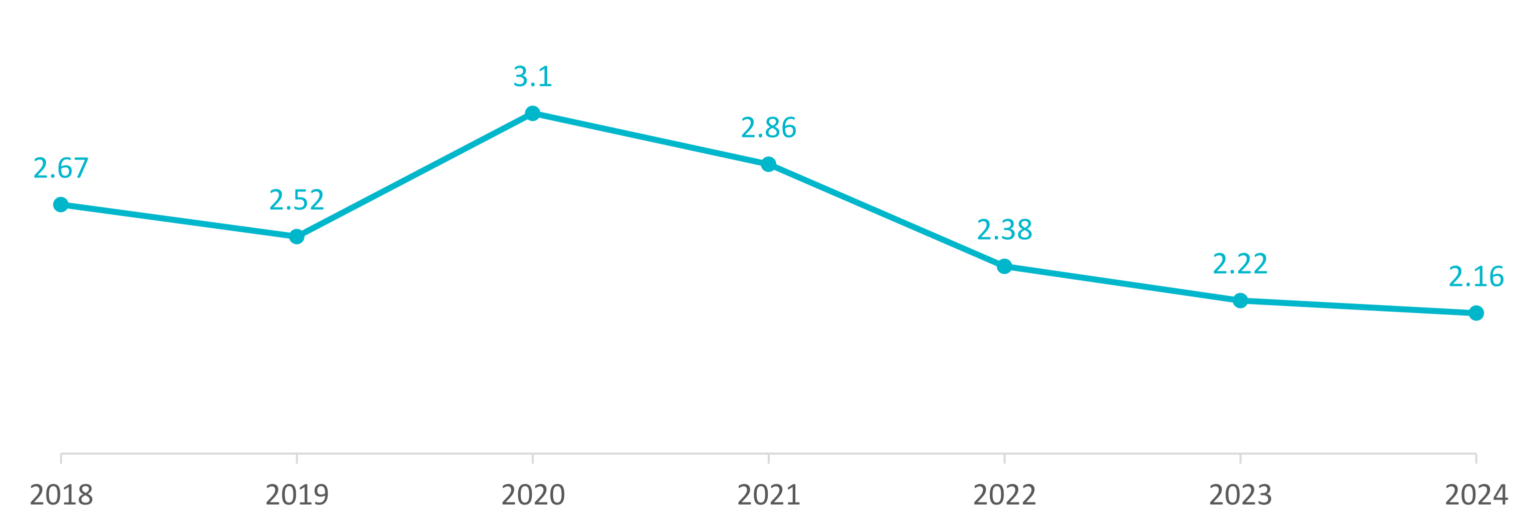
2024 and 2018-2024

Average length of stay, paid accommodation, 2024

2.16 nights

-0.06 nights (vs. 2023)

-0.36 nights (vs. 2019)

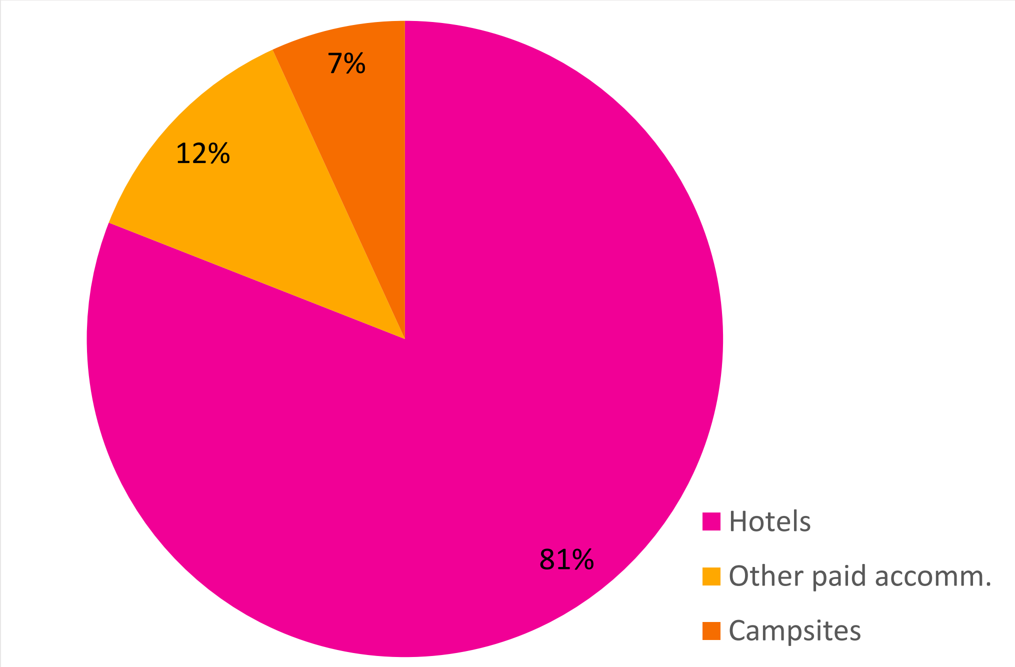


Source: Statec

Nights & arrivals in paid accommodation

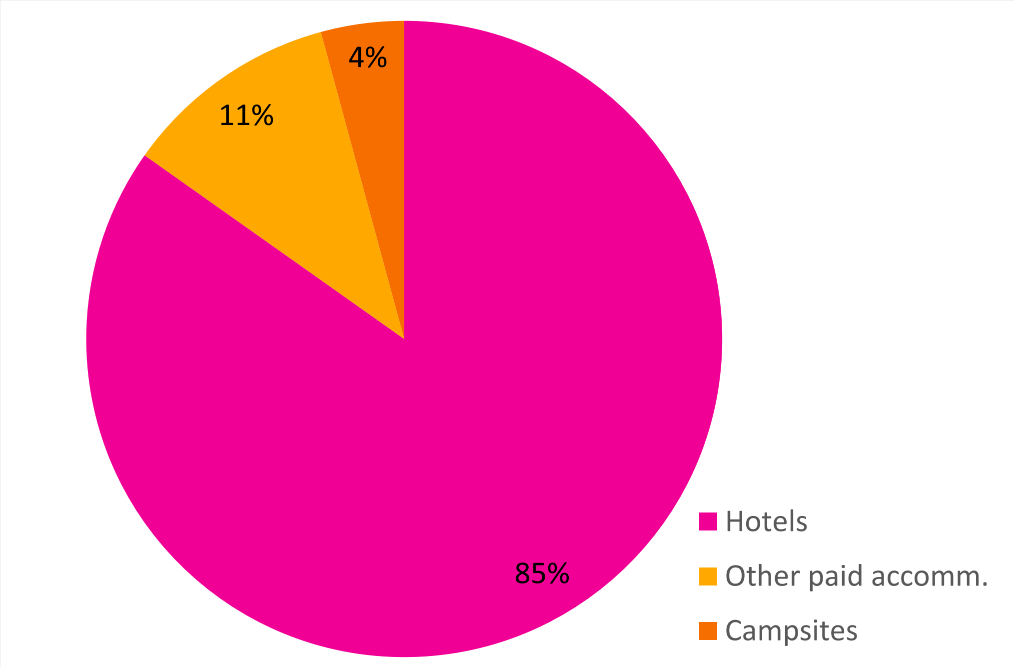
Type of accommodation, 2024

Nights, paid accommodation, 2024



Hotels	31.288	+1% (vs. 2023)	+62% (vs. 2019)
Other paid accomm.	4.720	+11% (vs. 2023)	+54% (vs. 2019)
Campsites	2.639	-25% (vs. 2023)	-66% (vs. 2019)

Arrivals, paid accommodation, 2024



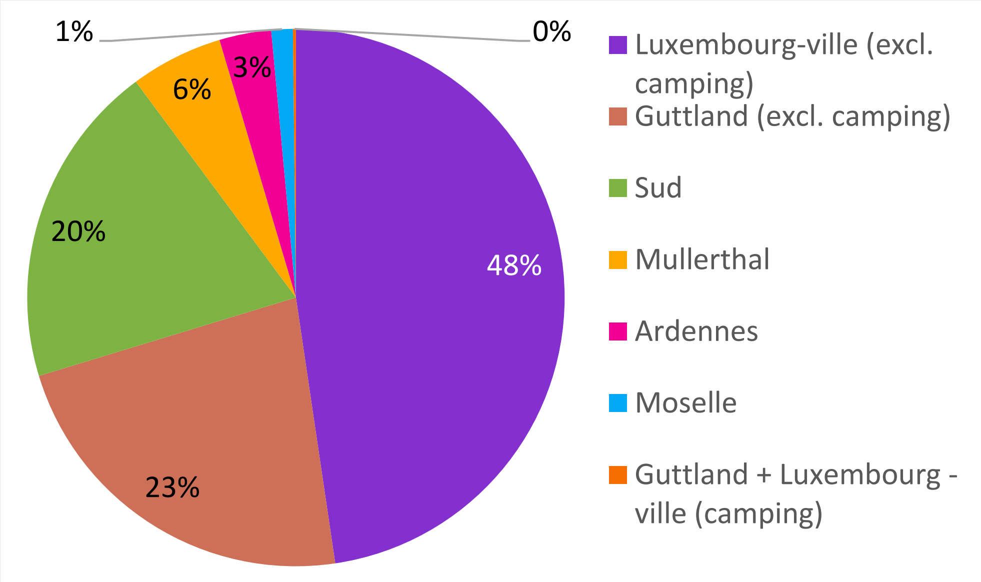
Hotels	15.188	+0% (vs. 2023)	+51% (vs. 2019)
Other paid accomm.	1.967	+11% (vs. 2023)	+34% (vs. 2019)
Campsites	756	+65% (vs. 2023)	+63% (vs. 2019)

Source: Statec

Nights & arrivals in paid accommodation

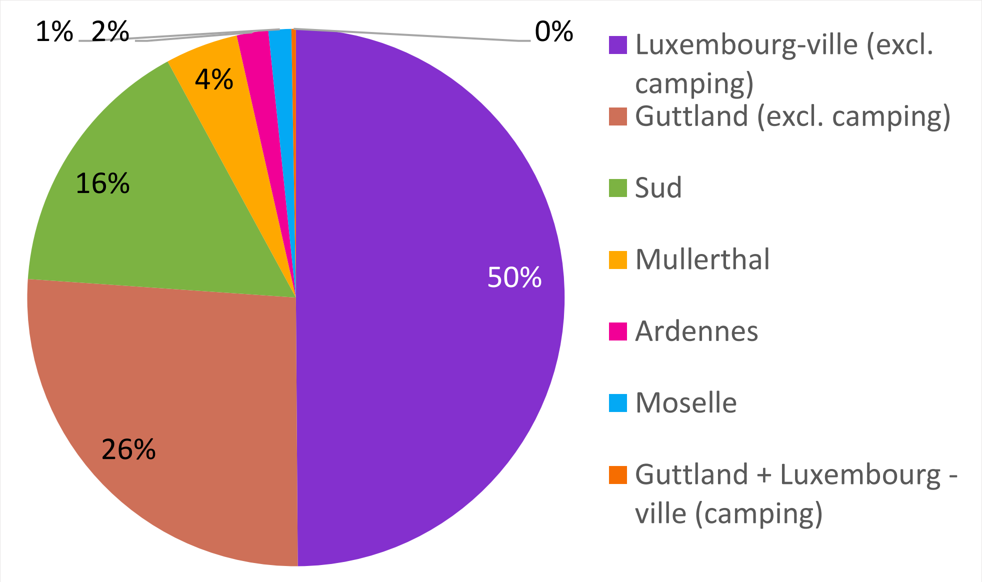
Regions, 2024

Nights, paid accommodation, 2024



Lux.-City (excl. camping)	18.420	+7% (vs. 2023)	+62% (vs. 2019)
Guttland (excl. camping)	8.744	-10% (vs. 2023)	+161% (vs. 2019)
South	7.556	-9% (vs. 2023)	+6% (vs. 2019)
MPSL	2.152	+134 % (vs. 2023)	+315% (vs. 2019)
Eislek	1.207	-48% (vs. 2023)	-83% (vs. 2019)
Moselle	499	+26% (vs. 2023)	-18% (vs. 2019)
Guttland/Lux.-City (camping)	69	+1% (vs. 2023)	-19% (vs. 2019)

Arrivals, paid accommodation, 2024



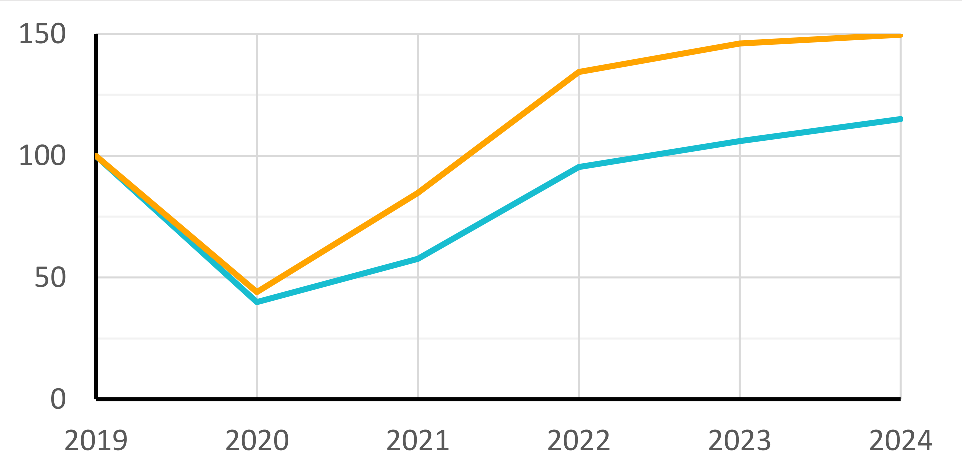
Lux.-City (excl. camping)	8.936	+5% (vs. 2023)	+60% (vs. 2019)
Guttland (excl. camping)	4.694	-2% (vs. 2023)	+153% (vs. 2019)
South	2.862	-9% (vs. 2023)	-15% (vs. 2019)
MPSL	785	+113% (vs. 2023)	+292% (vs. 2019)
Eislek	340	-19% (vs. 2023)	-48% (vs. 2019)
Moselle	246	+19% (vs. 2023)	+2% (vs. 2019)
Guttland/Lux.-City (camping)	48	-4% (vs. 2023)	+0% (vs. 2019)

Source: Statec

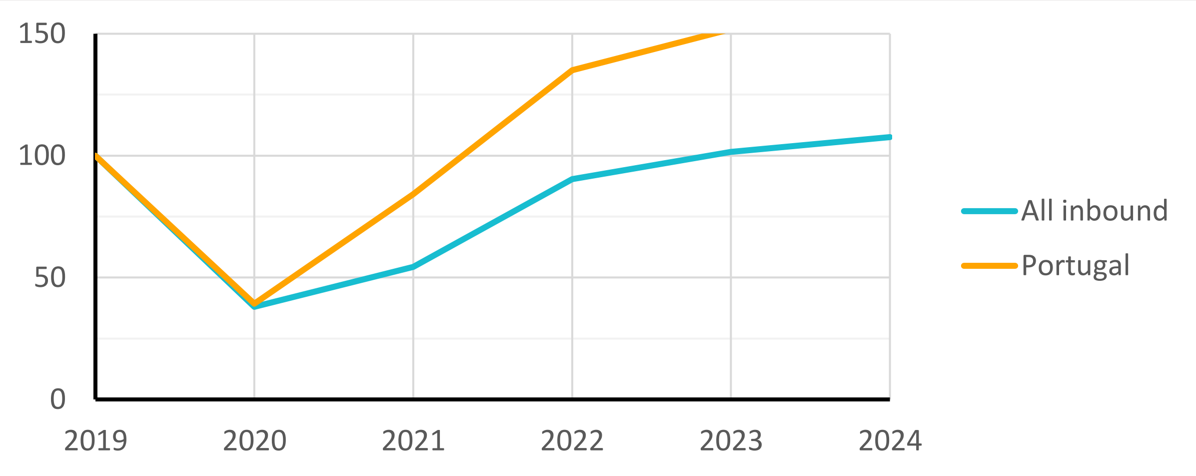
Arrivals in paid accommodation

Trends 2019-2024

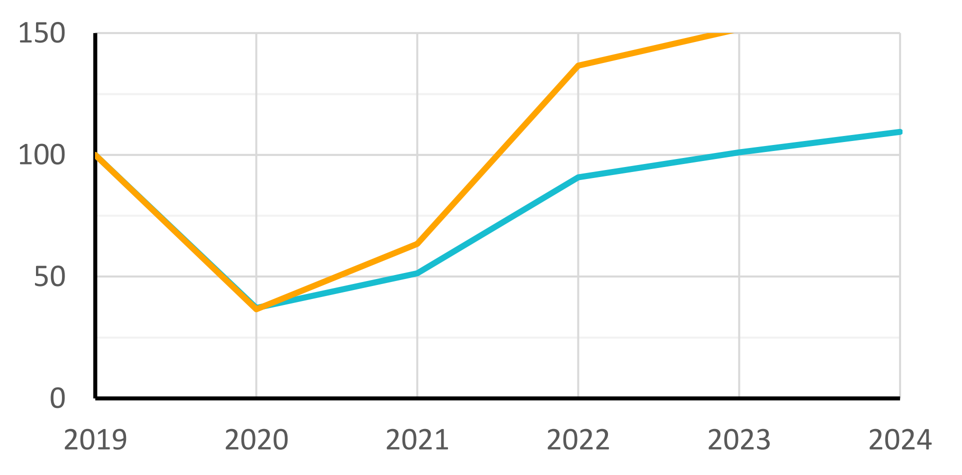
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

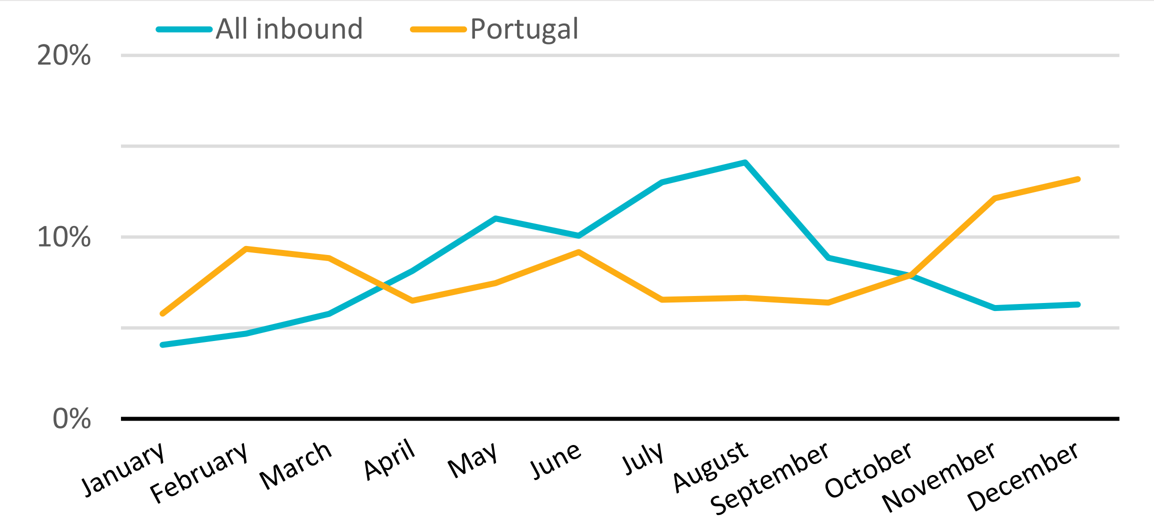


(*) excluding camping.
Source: Statec

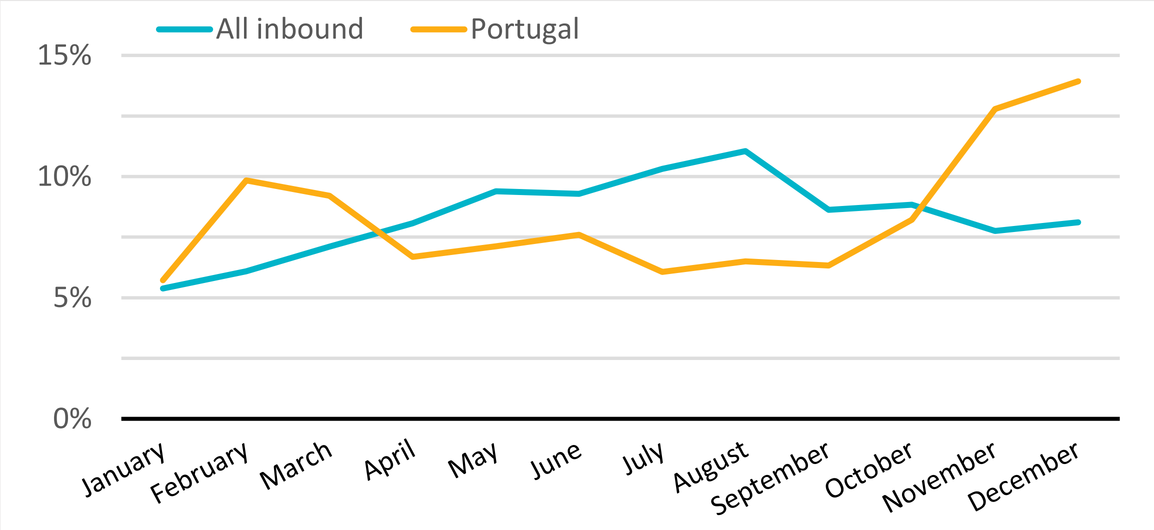
Arrivals in paid accommodation

Seasonality

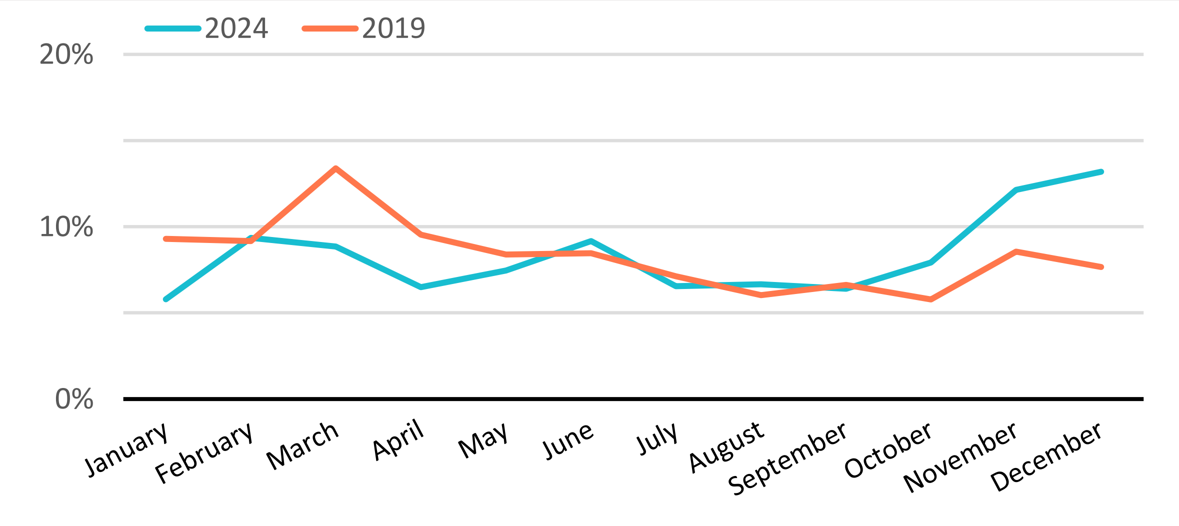
All paid accommodation, 2024



Hotels, 2024



All paid accommodation, arrivals from Portugal



Source: Statec

Short-term rentals

2024 and 2018-2024

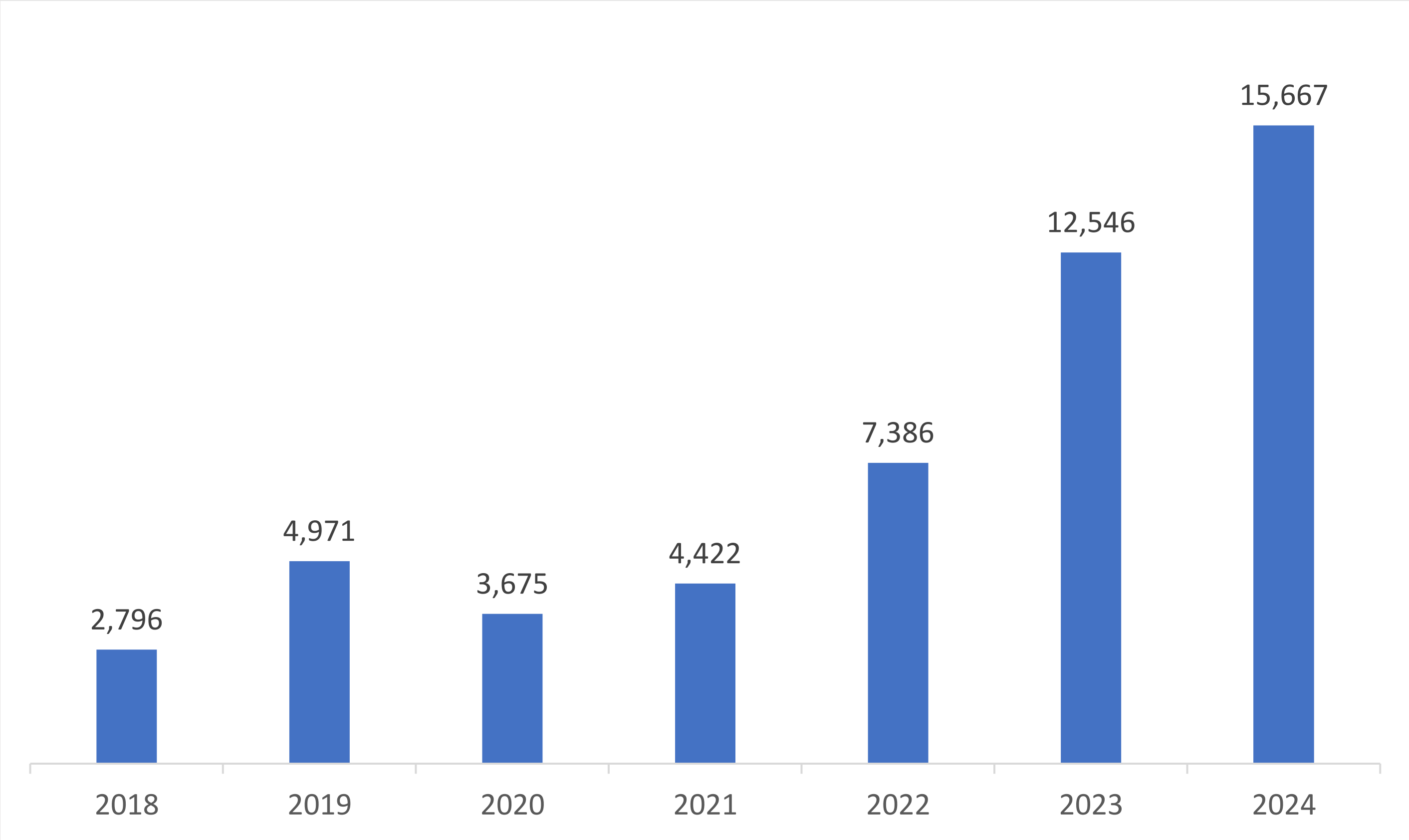
**Nights,
Short-term rentals, 2024**

15.667

25% (vs. 2023)

215% (vs. 2019)

**Nights,
Short-term rentals, 2018-2024**



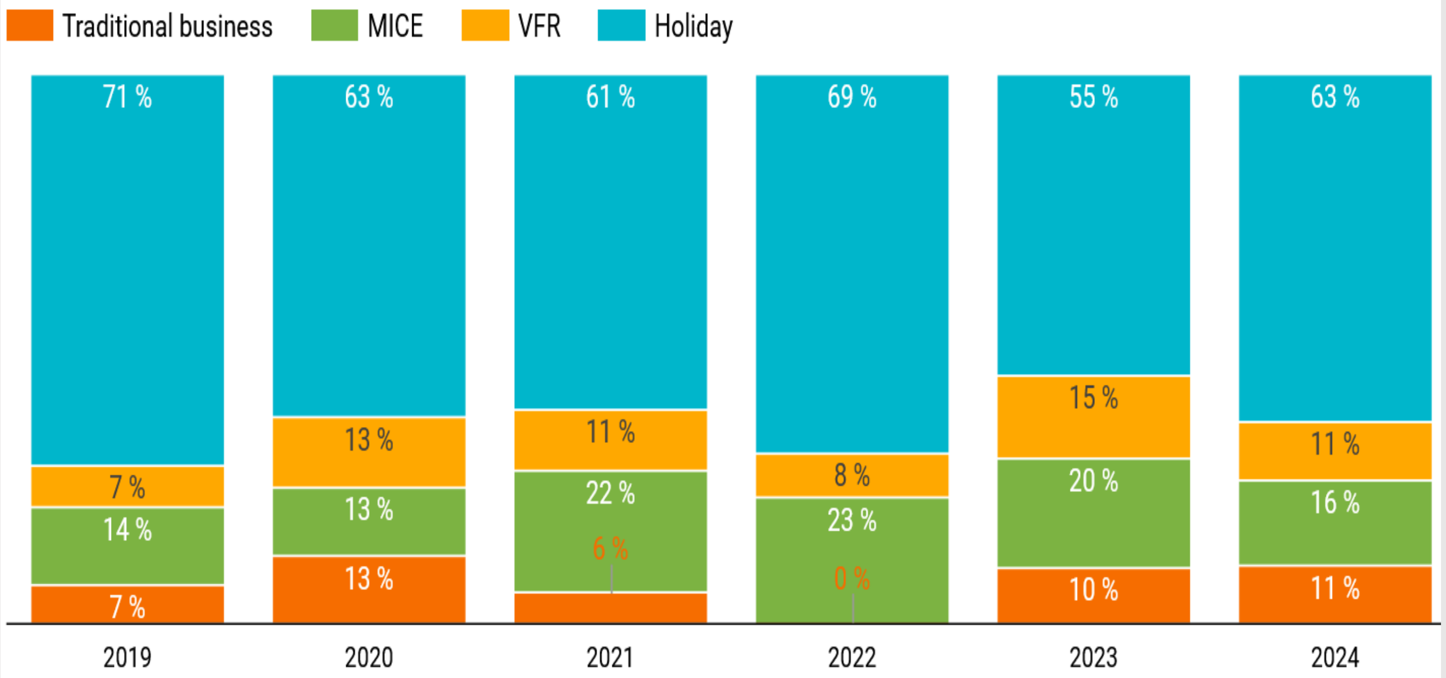
Source: Eurostat (experimental statistics).

Characteristics of inbound trips

Portuguese trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2018-2024

Portuguese trips to Luxembourg, 2019-2024



2024

	Portugal to	**Europe to**
	Luxembourg	
Holiday	63%	61%
VFR	11%	15%
MICE	16%	15%
Traditional Business	11%	8%

Source: World Travel Monitor/IPK International.

Inbound same-day trips to Luxembourg
2024

Number of inbound same-day trips, 2024 (estimate)

41.000

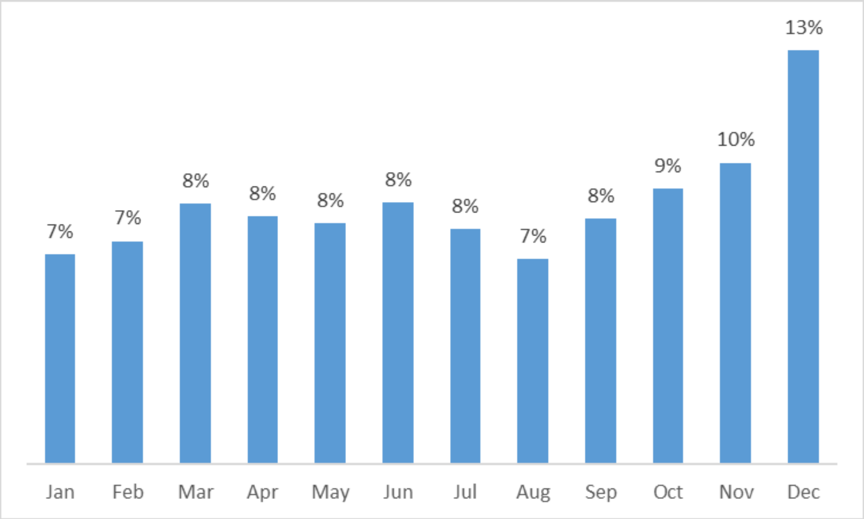
+7% (vs. 2023)

Average length of same-day trips

7,9 h

-0,3 h (vs. 2023)

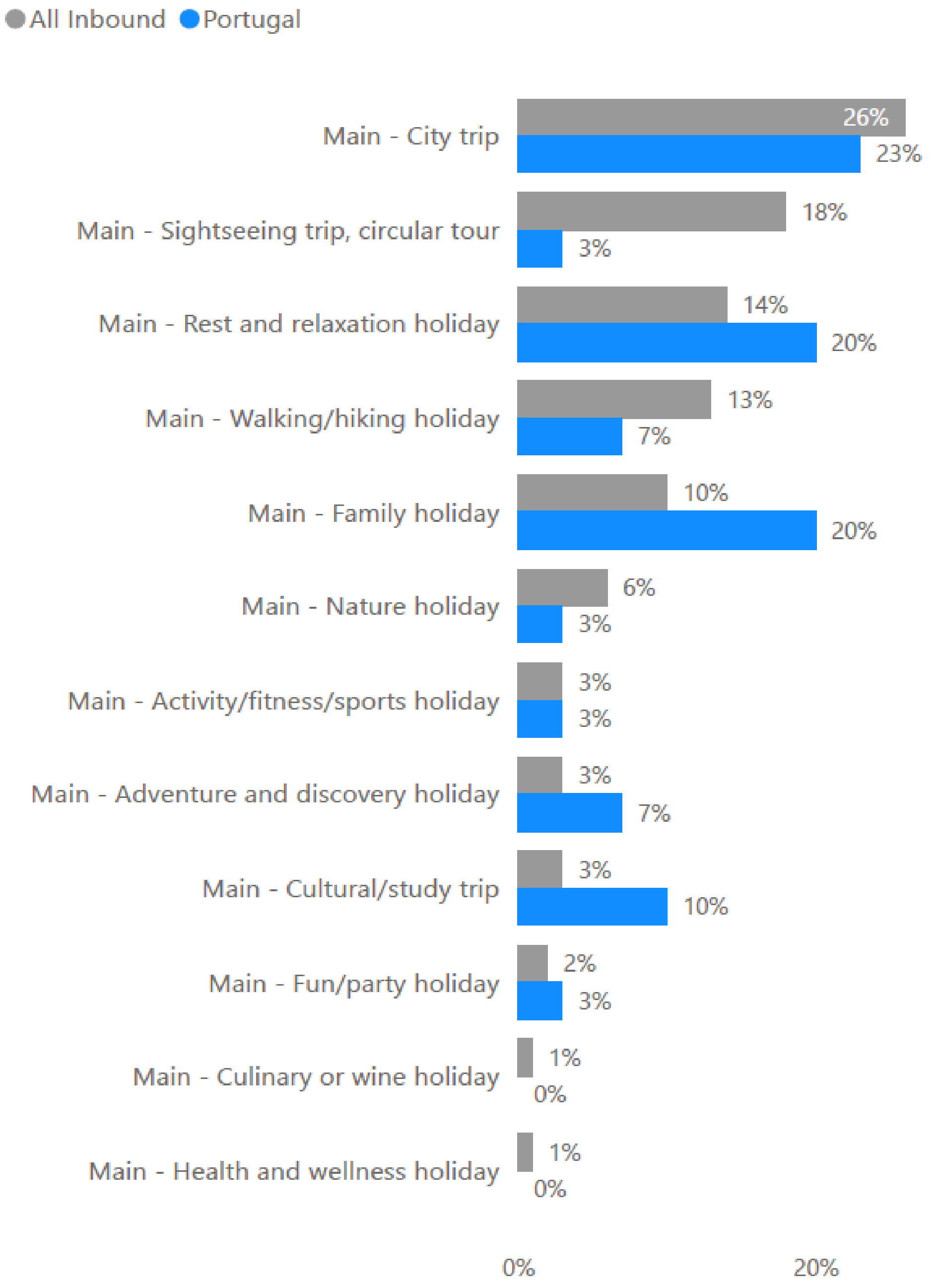
Seasonality
% of same-day trips



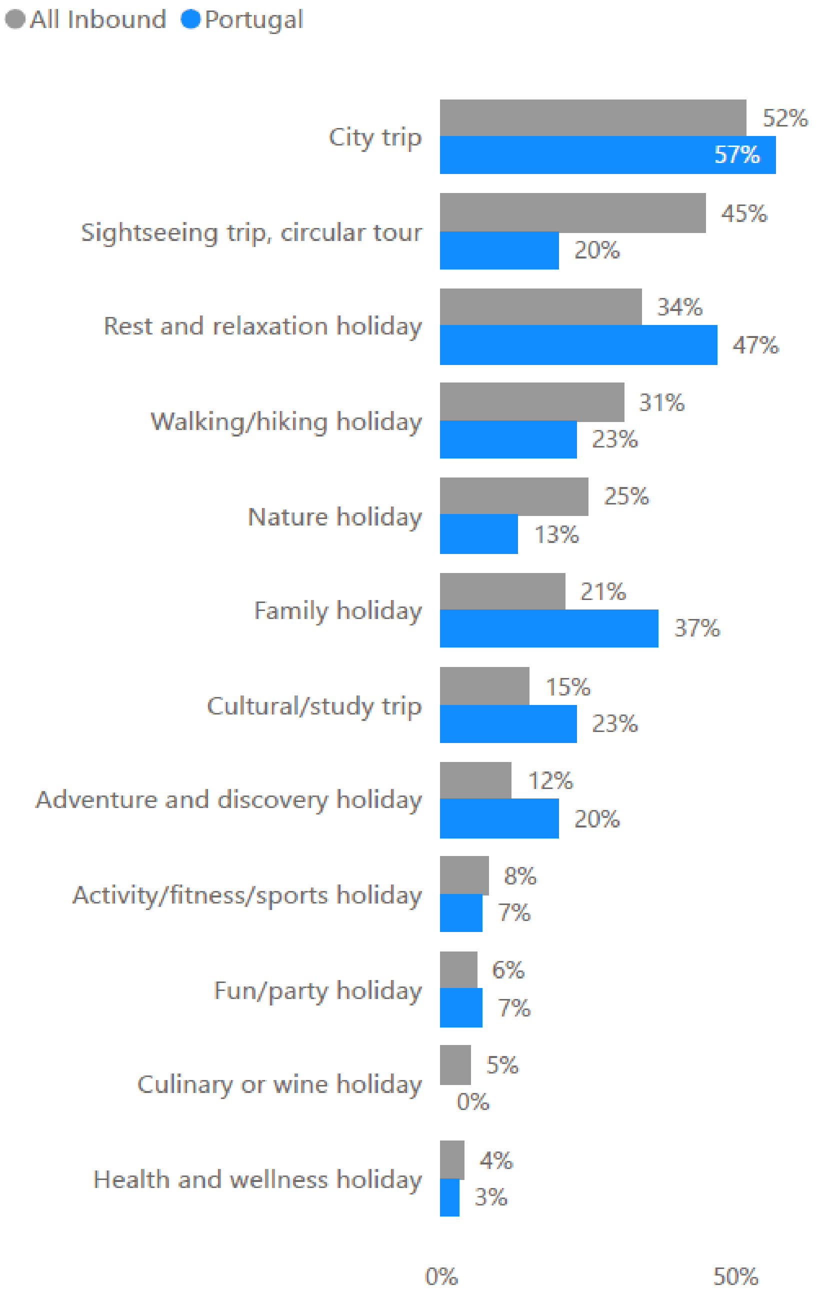
Sources: LFT estimates, Mobile phone data (Editus/LFT), LFT/Ilres Visitor Survey.

Travel behaviour of inbound leisure visitors

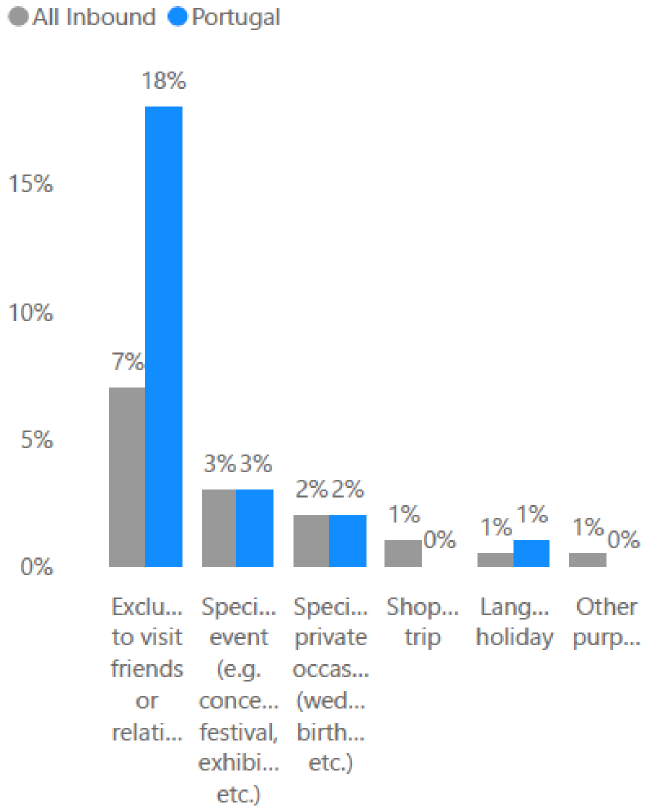
Main holiday types
Visitors with overnight



All holiday types
Visitors with overnight

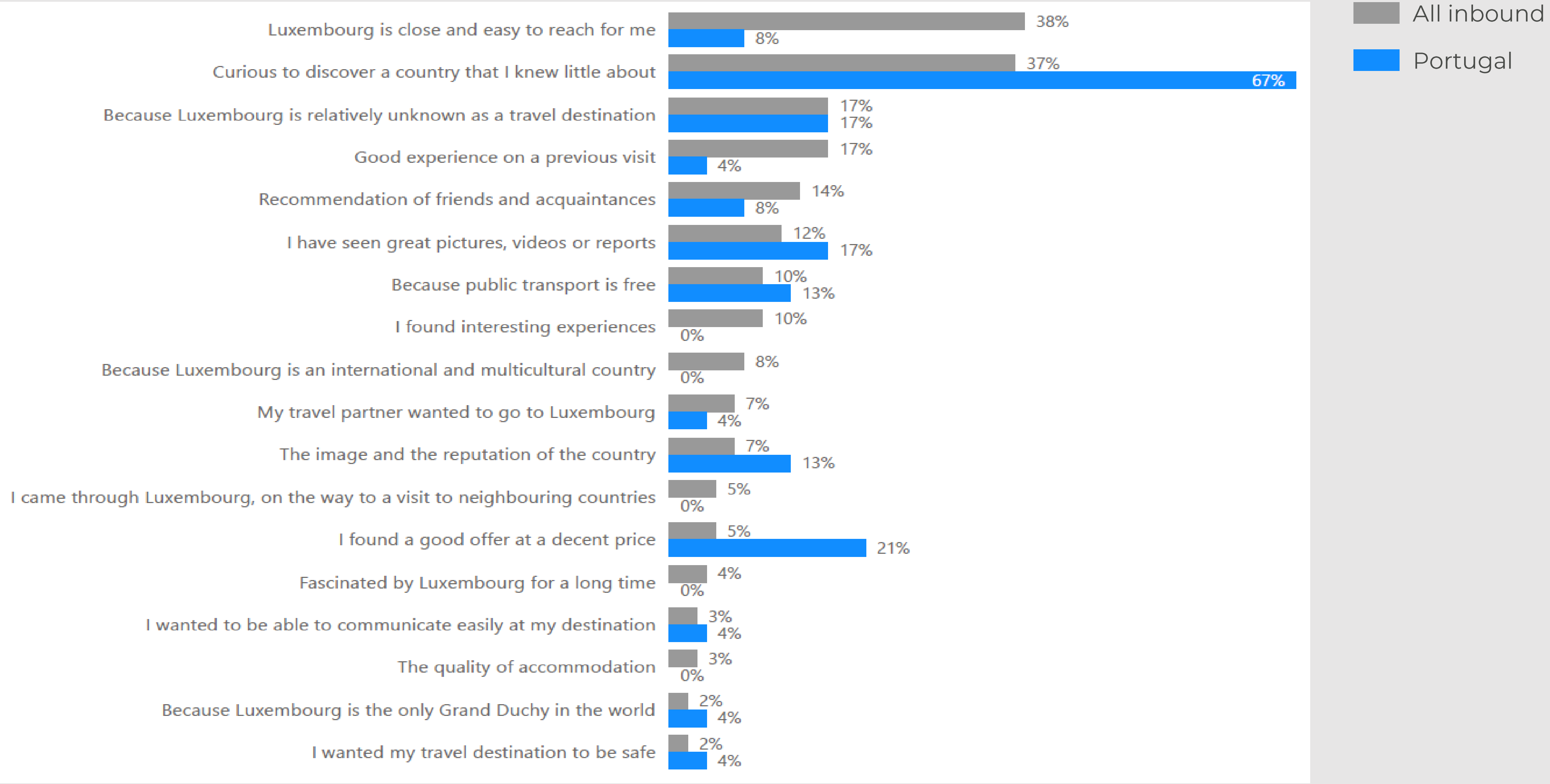


Main purpose of overnight trip
(if not holiday)



Key decision criteria for choosing Luxembourg

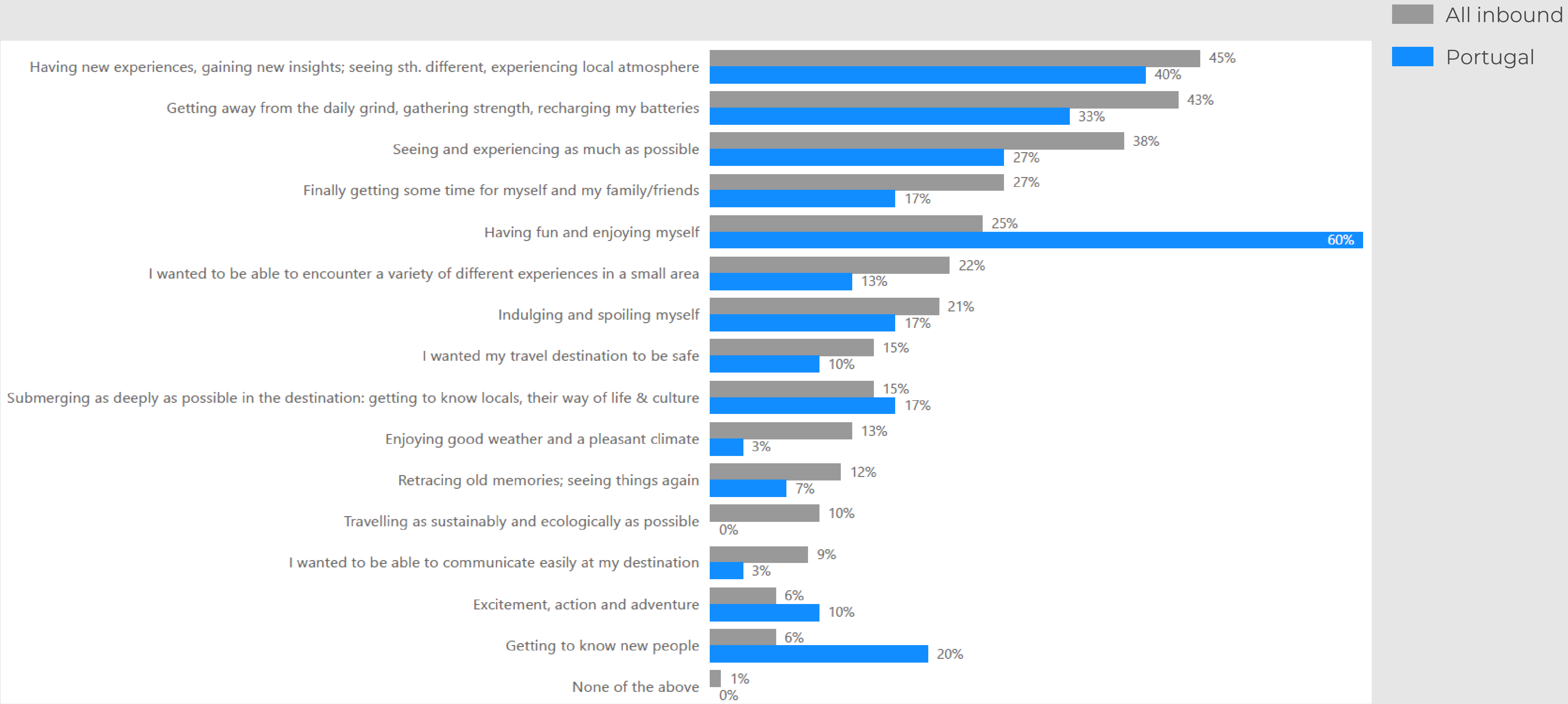
Inbound leisure visitors with overnight (*), 2023-2024



Source: LFT/Ilres Visitor Survey.
(*) Maximum 3 answers possible.

Key travel motives

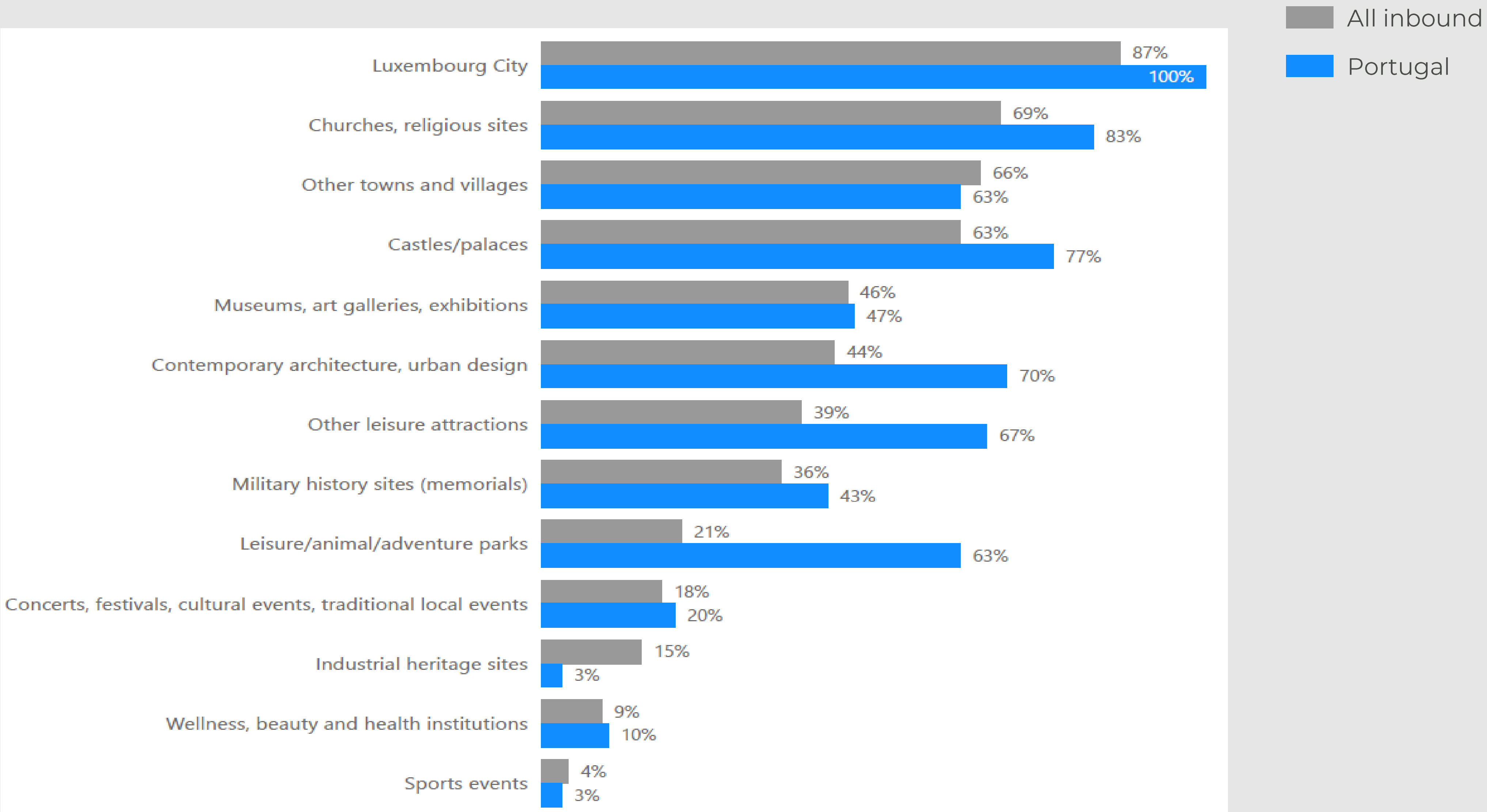
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Type of places visited in Luxembourg

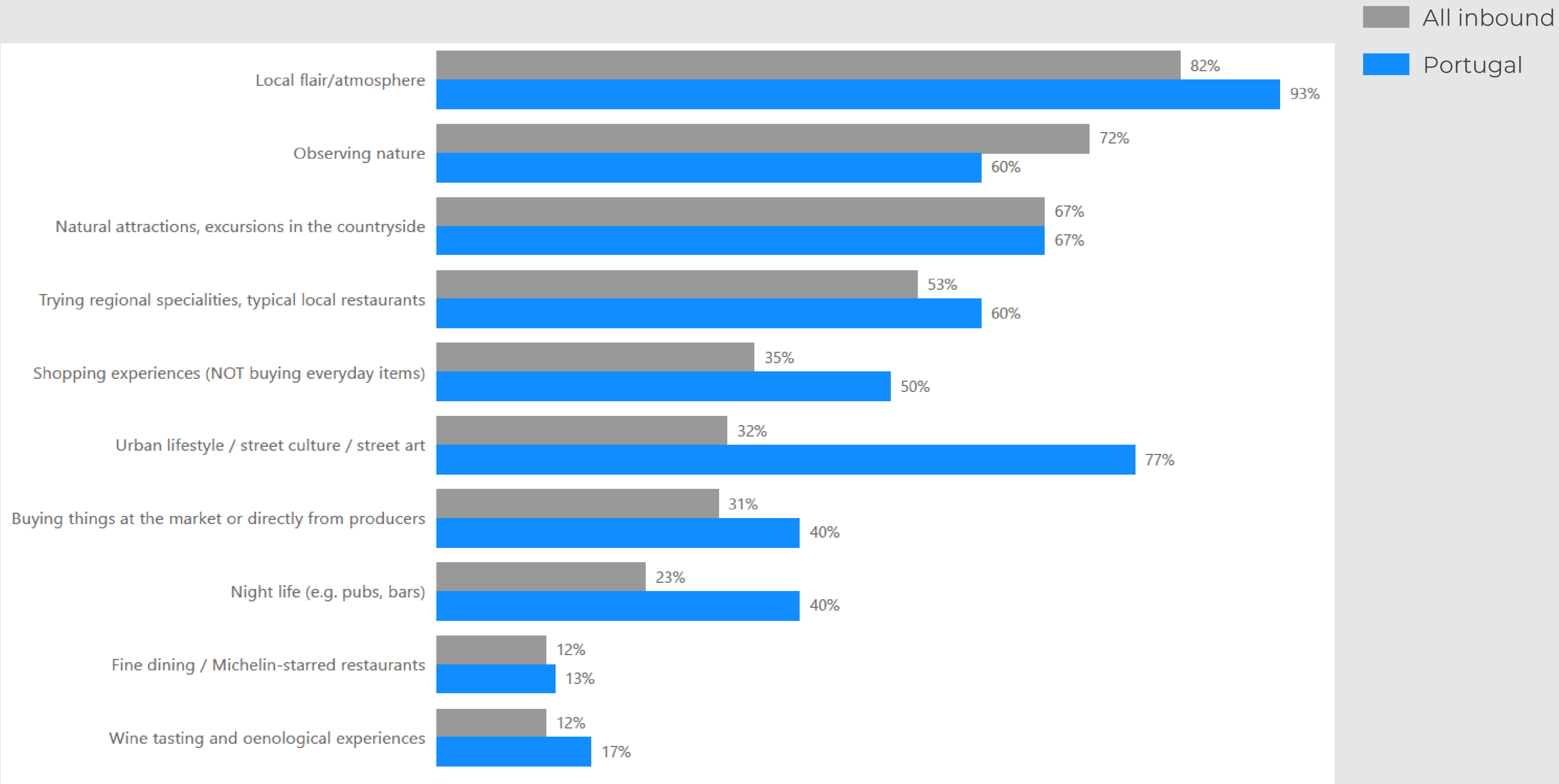
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Non-sporting activities undertaken in Luxembourg

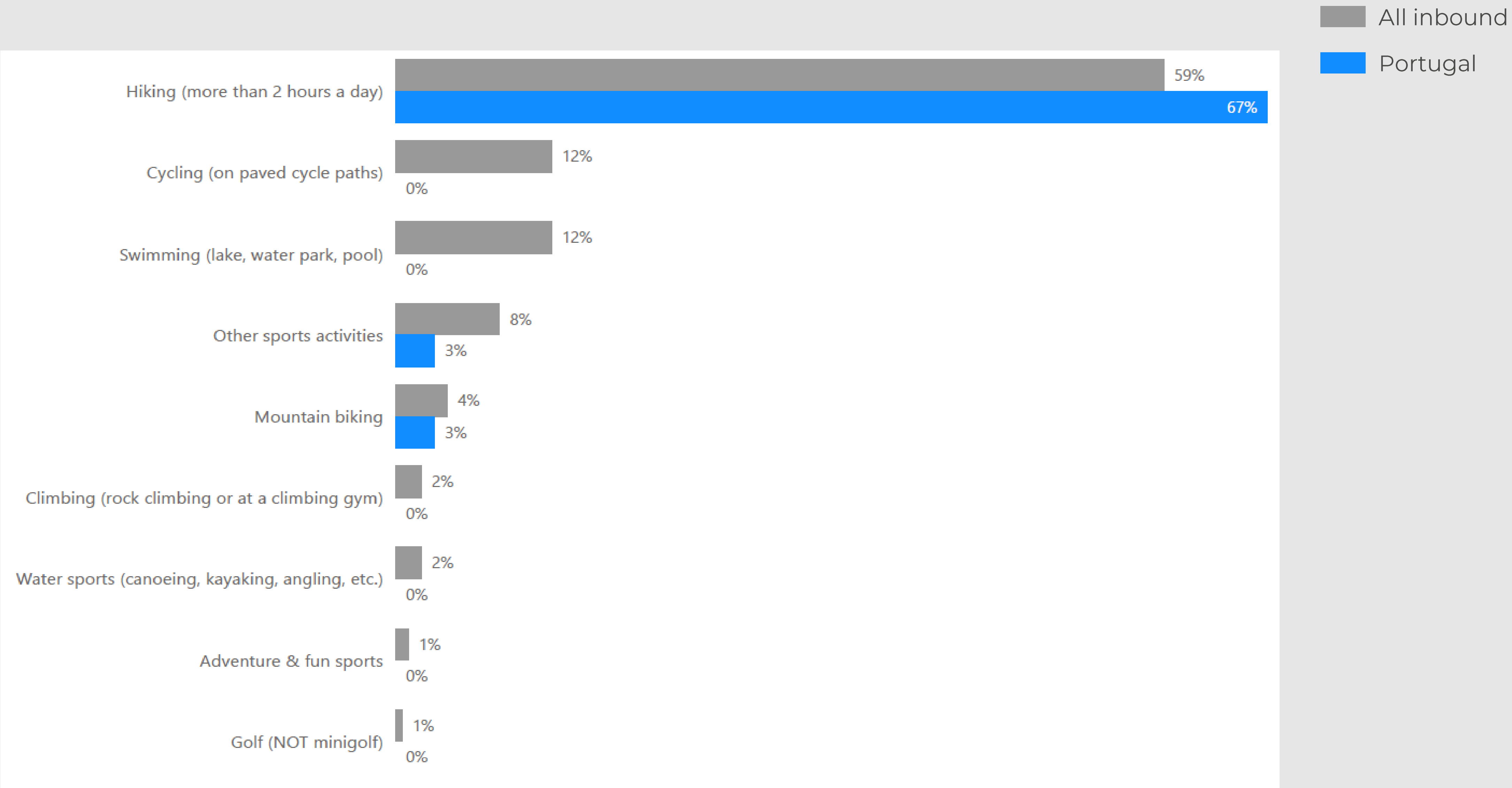
Inbound leisure visitors with overnight, 2023-2024



Source: LFT/Ilres Visitor Survey.

Sporting activities undertaken in Luxembourg

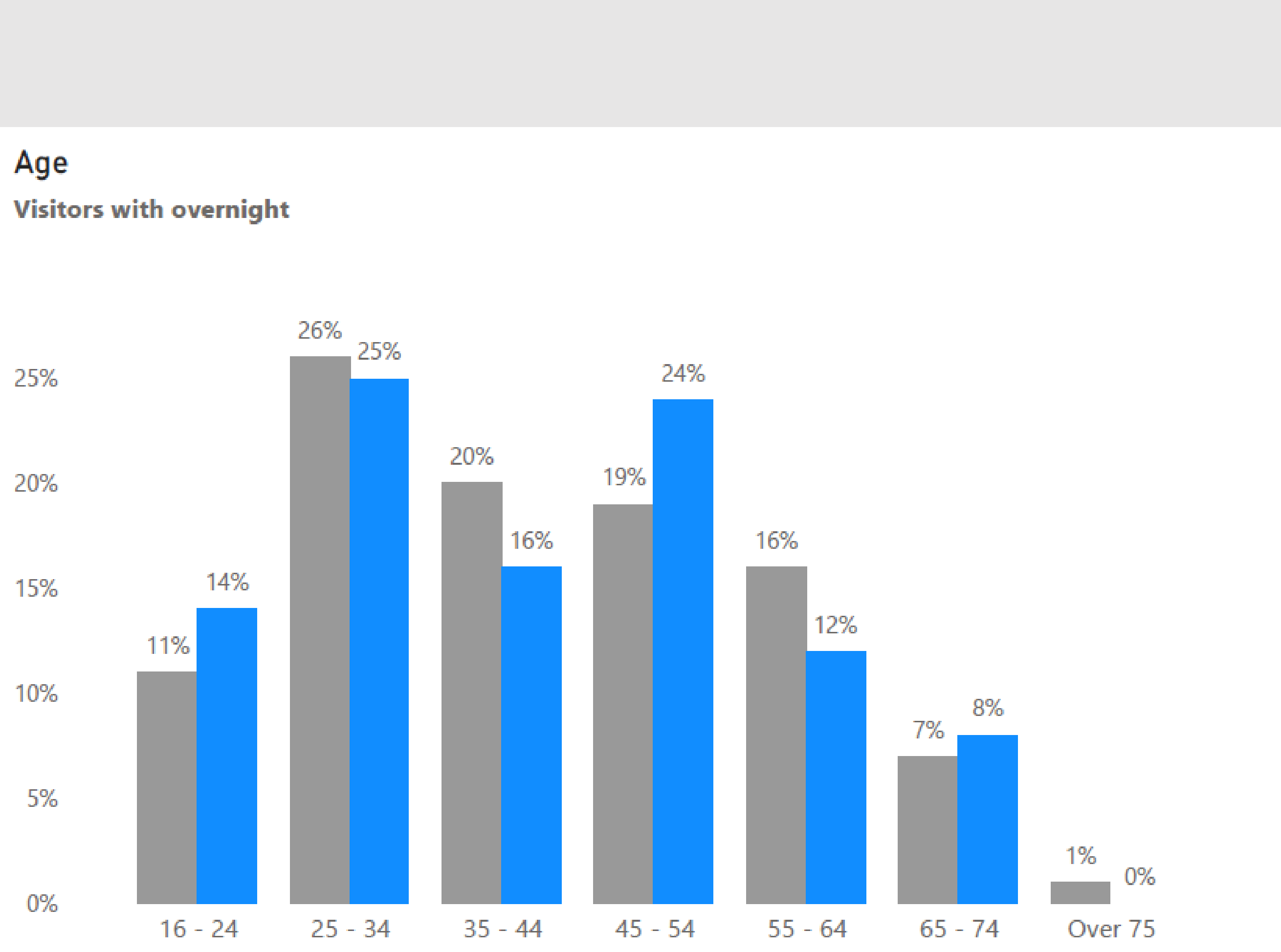
Inbound leisure visitors with overnight, 2023-2024

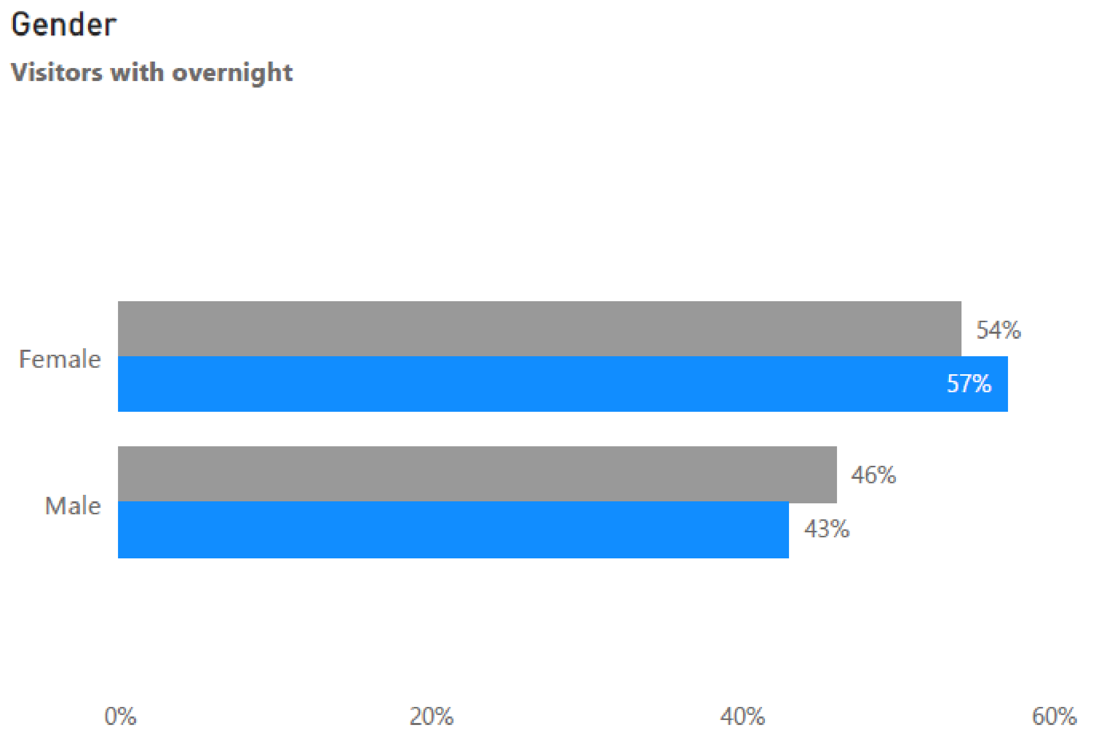


Source: LFT/Ilres Visitor Survey.

Age groups

Inbound leisure visitors with overnight, 2023-2024

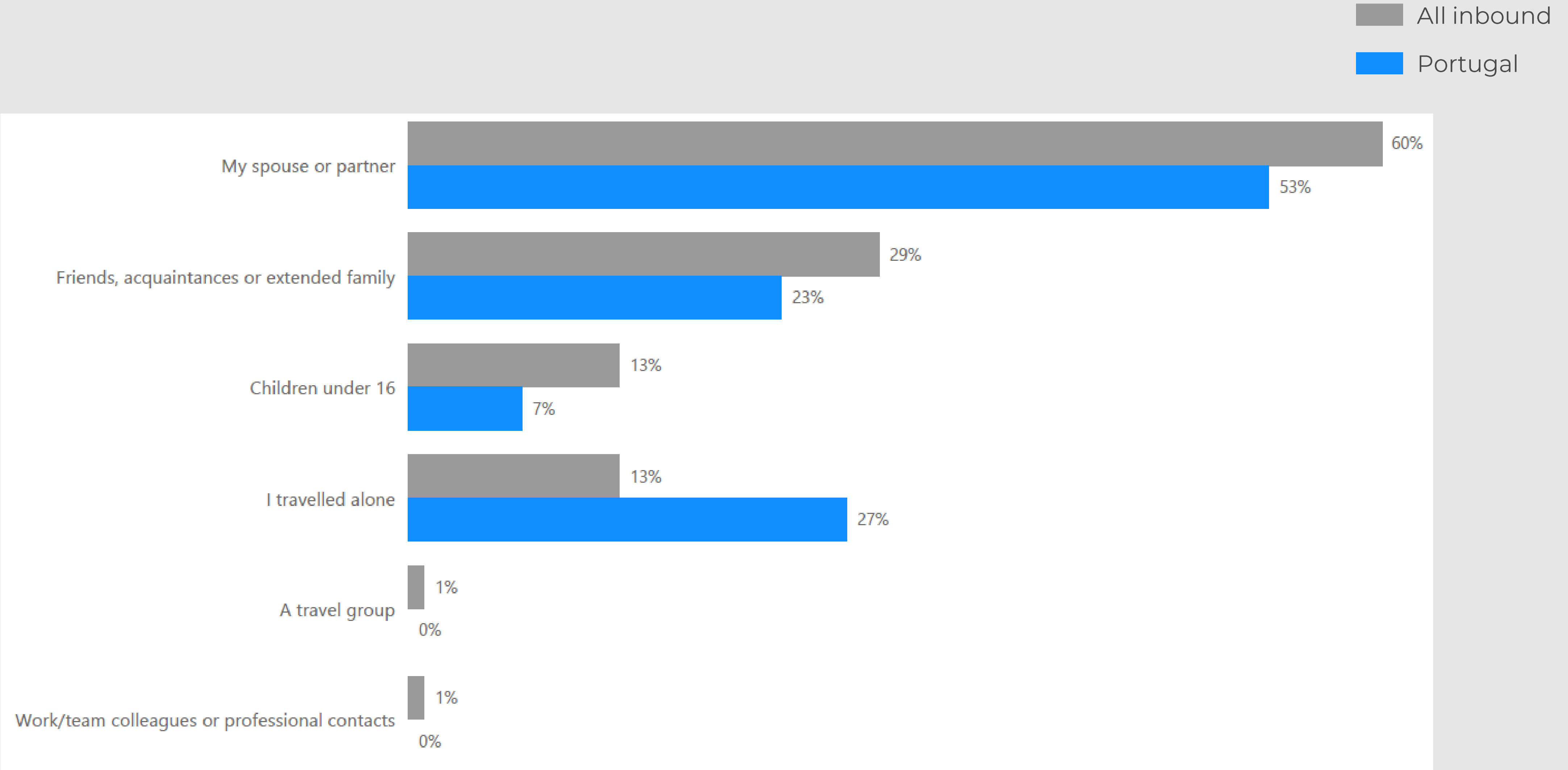




Source: LFT/Ilres Visitor Survey.

Travel party

Inbound leisure visitors with overnight, 2023-2024

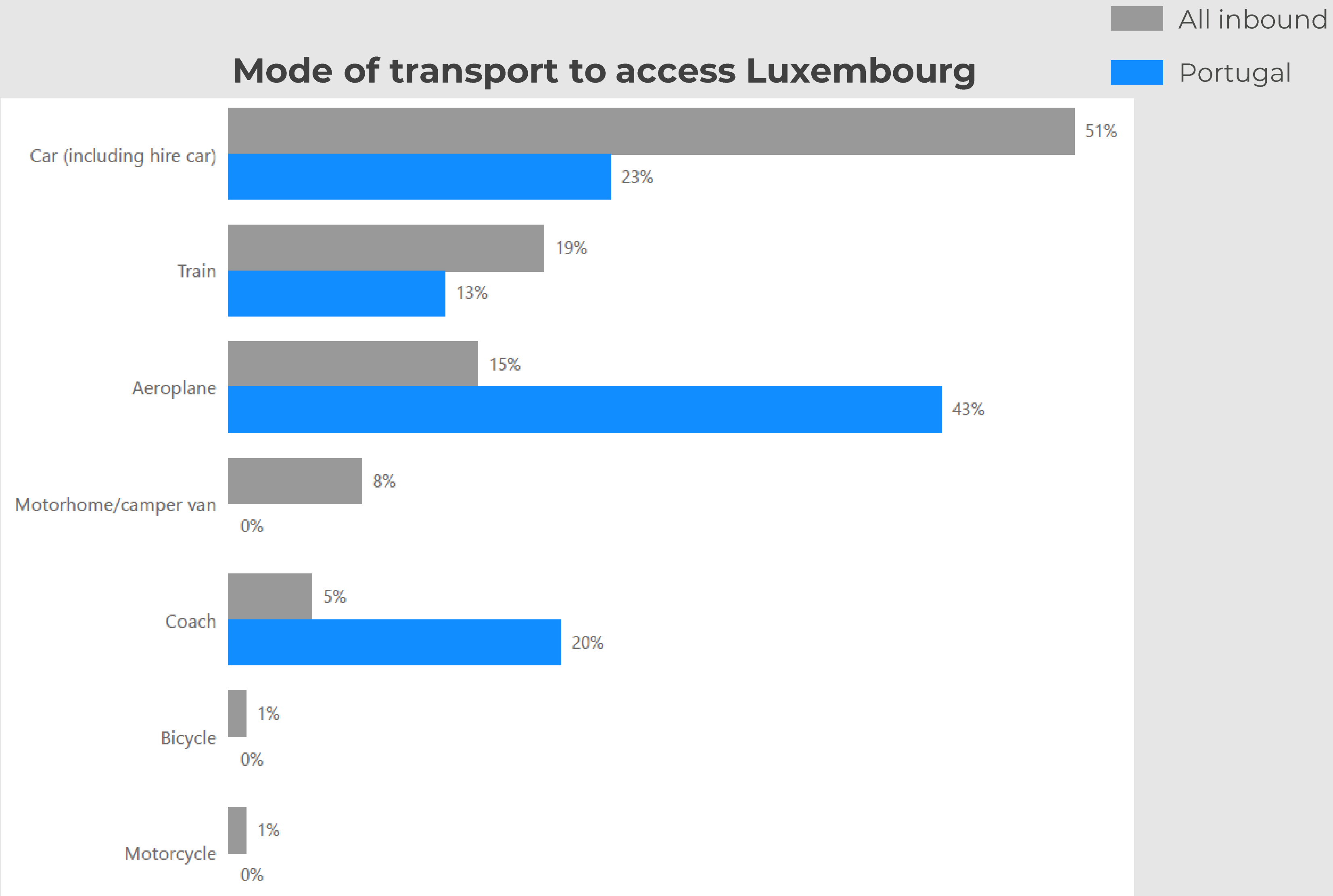


Source: LFT/Ilres Visitor Survey.

Transport, new visitors and cross-border trips

Inbound leisure visitors with overnight, 2023-2024

Mode of transport to access Luxembourg



First-time visitors

Visitors with overnight

63%
All Inbound

70%
Portugal

Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

39%
All Inbound

30%
Portugal

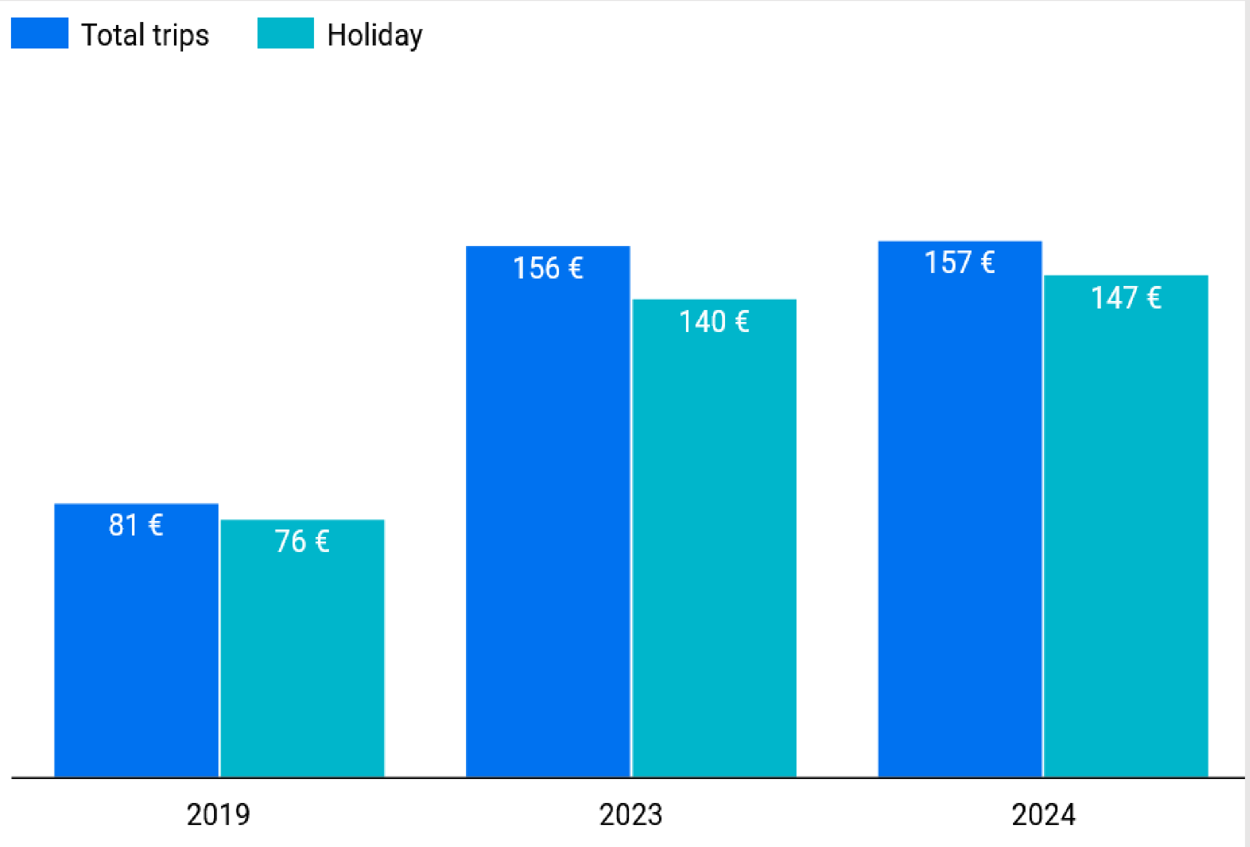
Source: LFT/Ilres Visitor Survey.

Expenditure

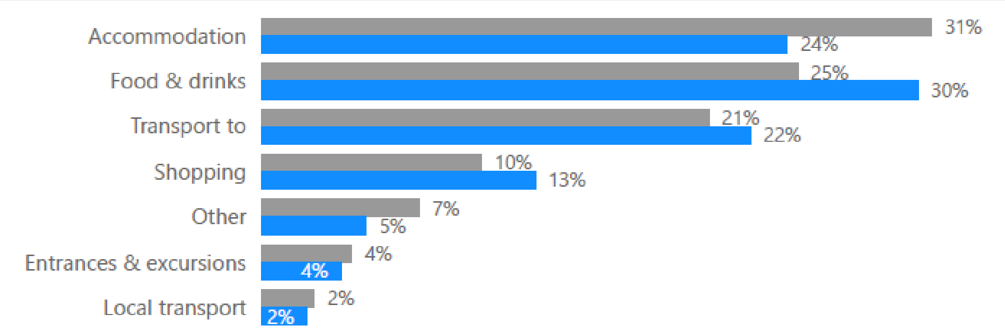
Inbound trips to Luxembourg with overnight (all accommodation)

All inbound
Portugal

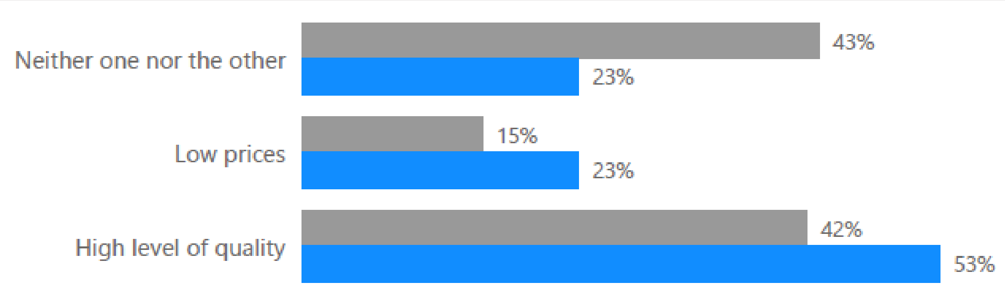
Average expenditure/pers./day



Expenditure of leisure inbound visitors by categories, 2023-2024



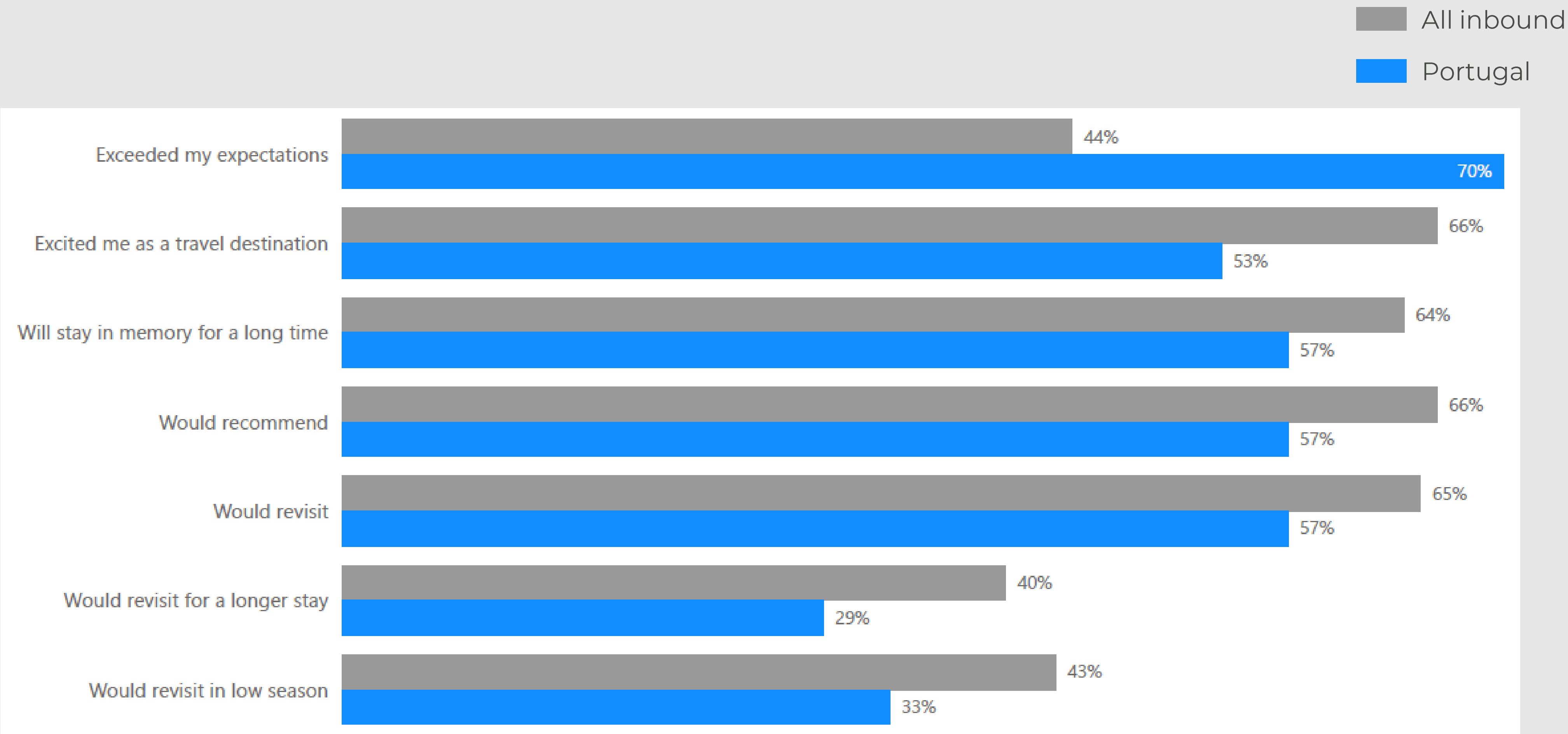
Quality vs. price-orientation of leisure inbound visitors, 2023-2024



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

Visitor satisfaction and recommendation

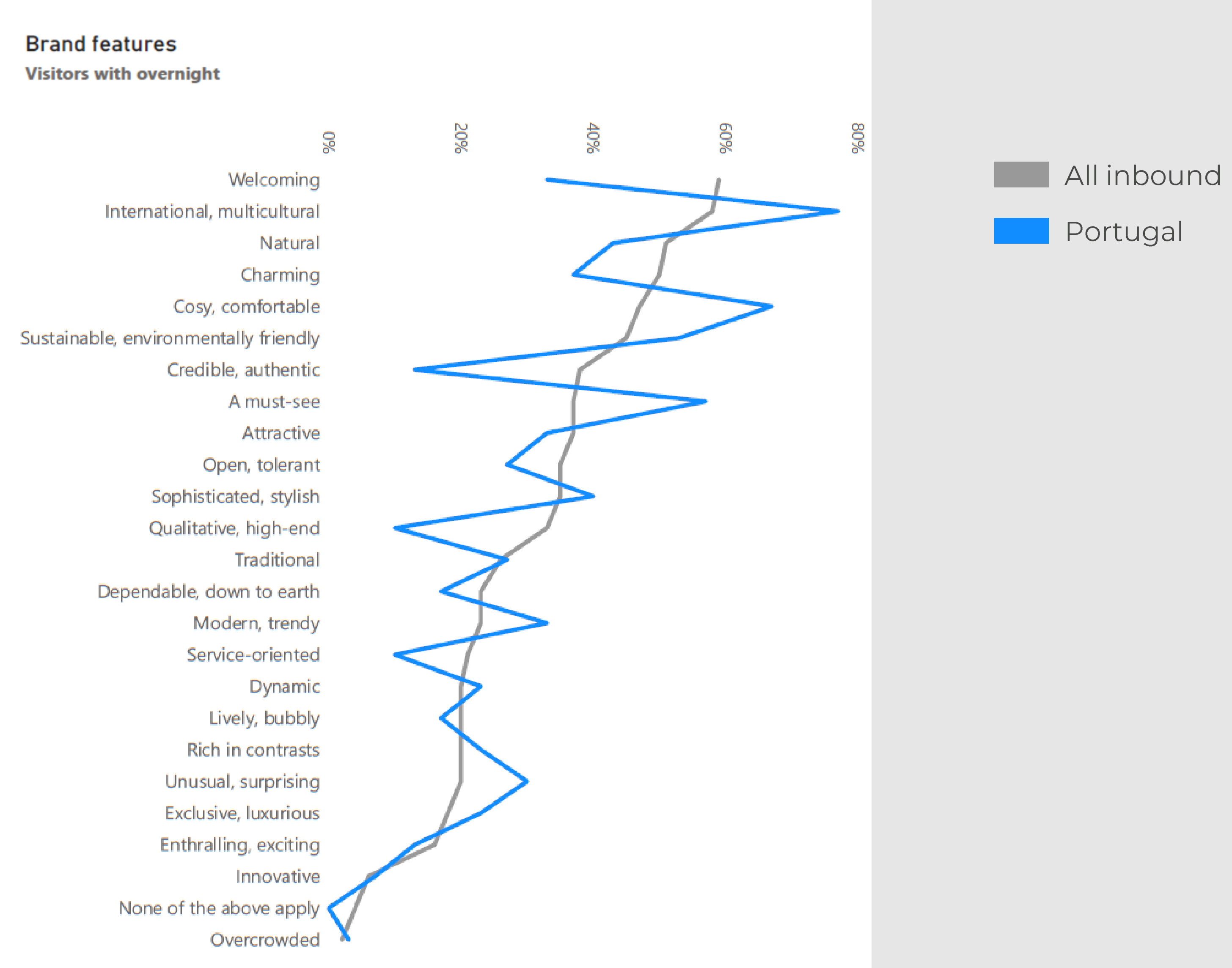
Inbound leisure visitors, 2023-2024



Source: LFT/Ilres Visitor Survey.

Brand features perception

Inbound leisure visitors with overnights, 2023-2024



LFT Target Segments

Explorers

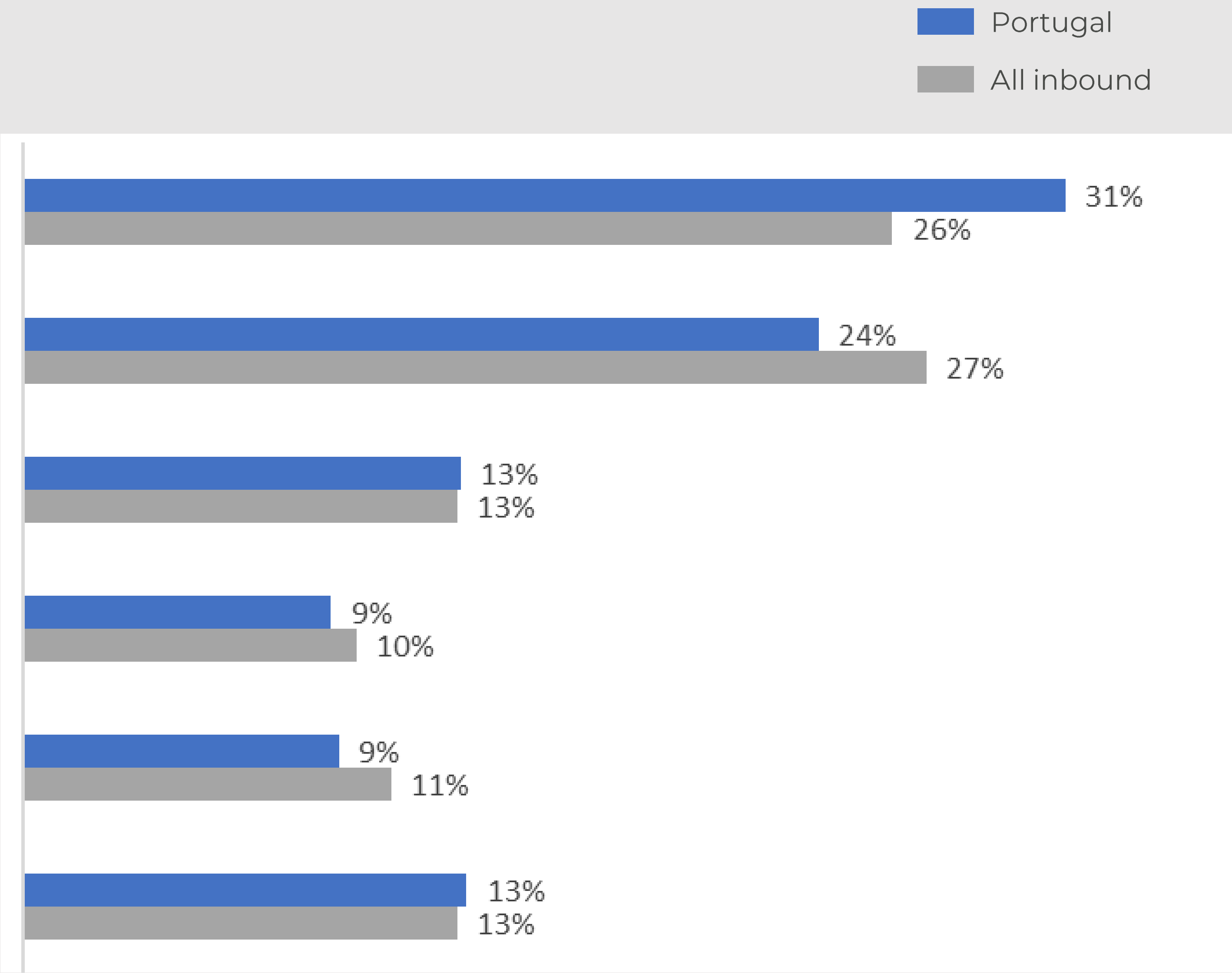
Nature-Loving Actives

Relaxation Seekers

Short Breakers

Perfection Seekers

Leisure Oriented

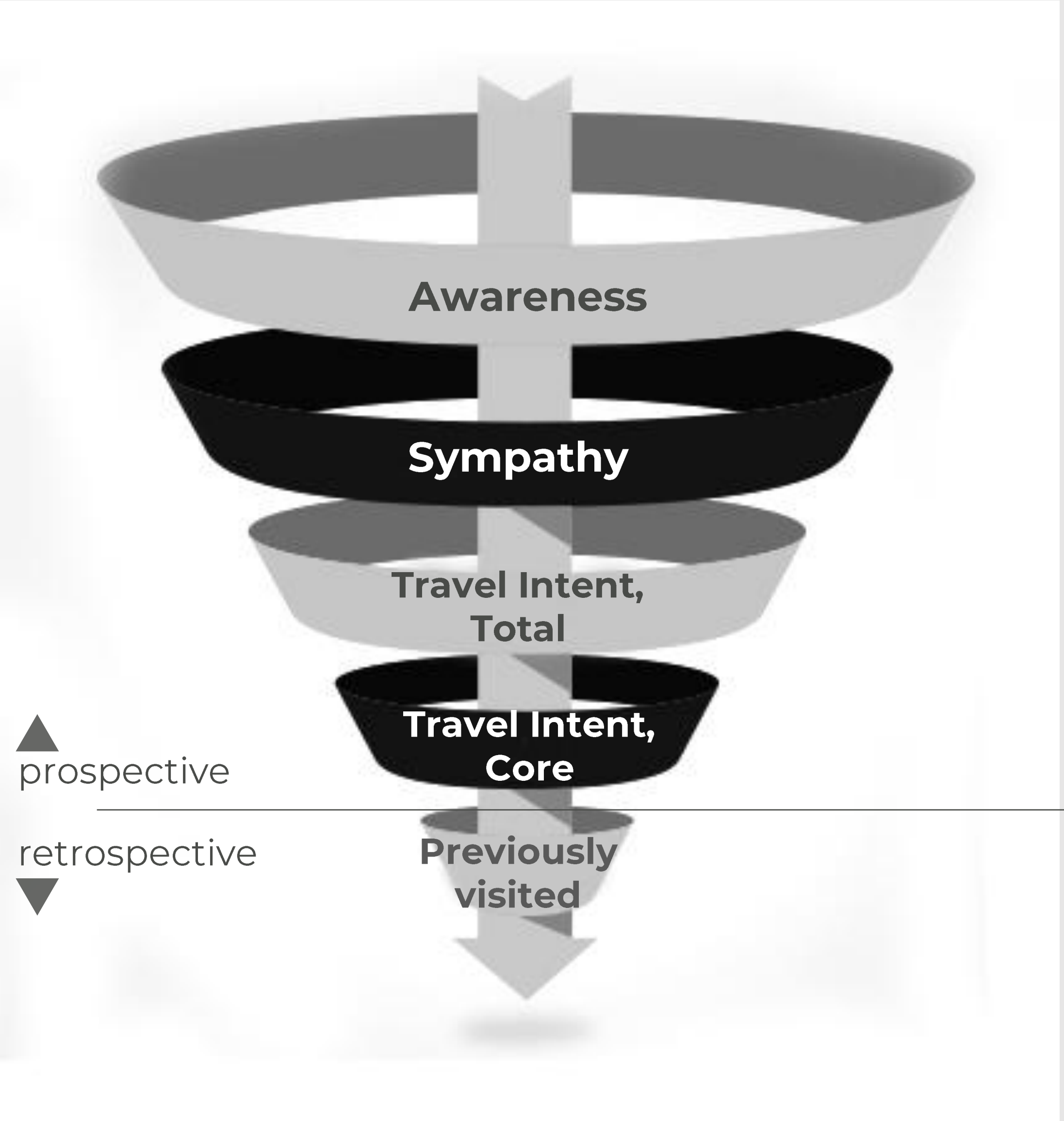


Source: LFT (estimate).

Target segments,
Brand & Growth Potential

Destination Luxembourg - Brand Funnel 2024

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

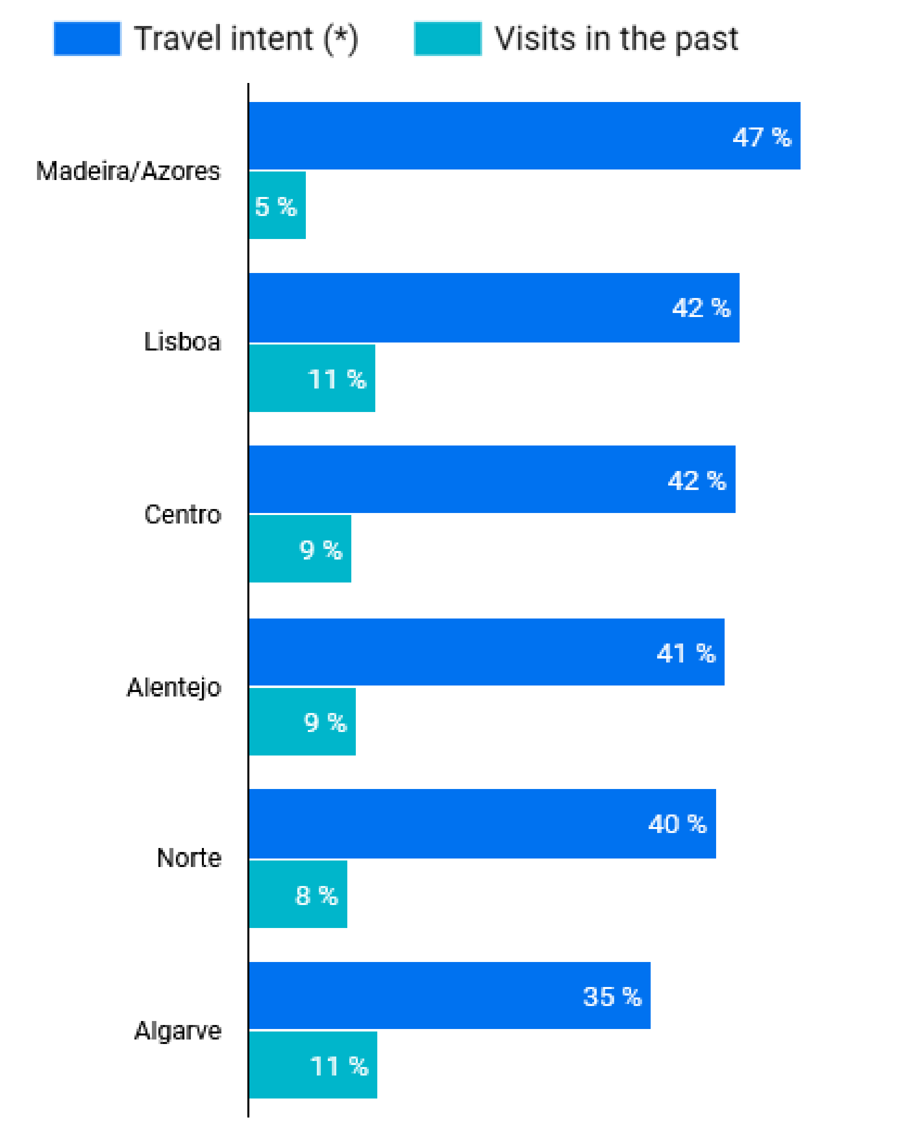


88%	82%
72%	67%
63%	55%
65%	62%
35%	27%
41%	34%
22%	15%
9%	20%

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

Source: LFT Brand & Potential Study, 2024.

Luxembourg's Theme Competence (*)

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

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

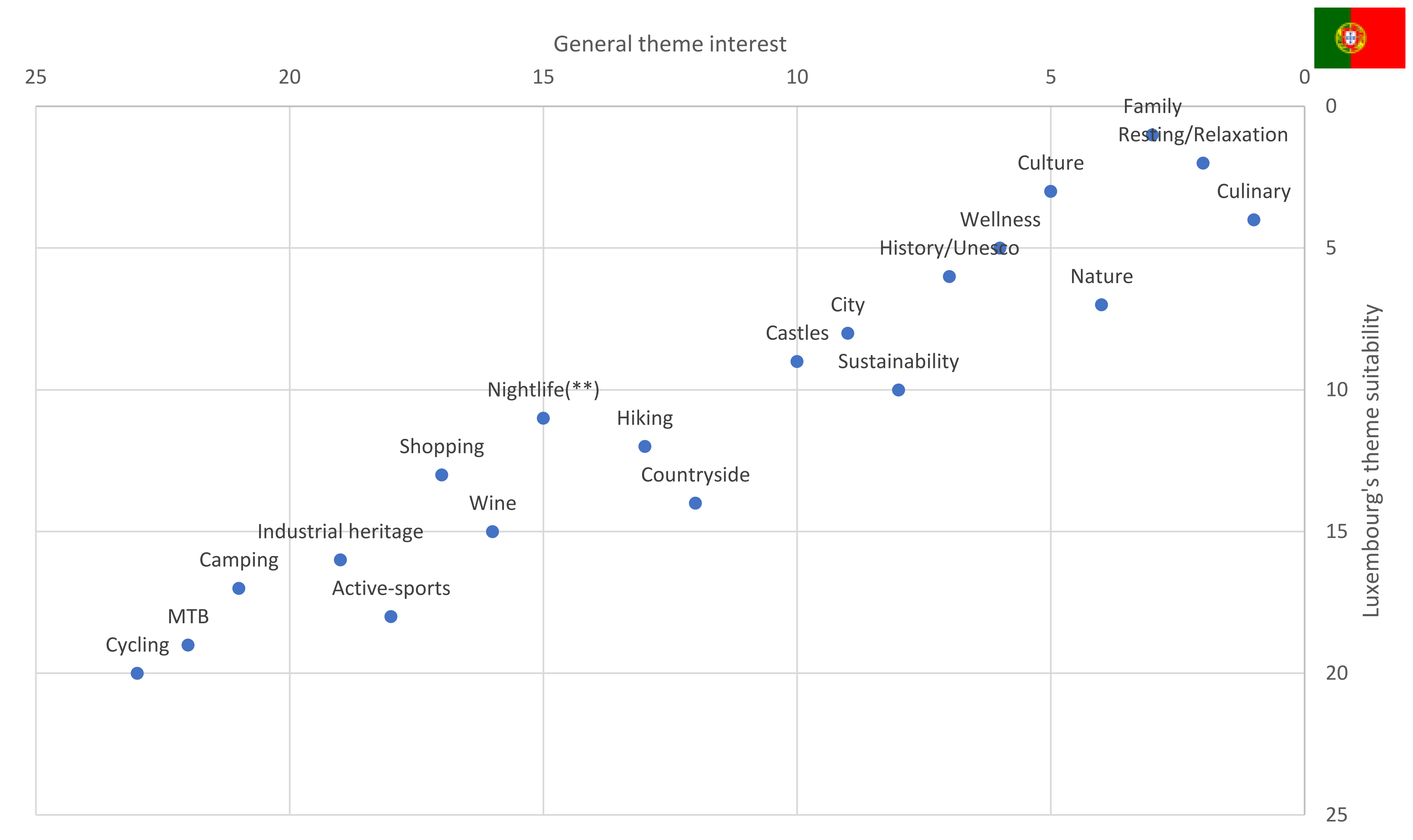
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

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

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	Europe	Portugal	Portugal
	Rank	**Rank**	% agreeing
safe	1	**1**	68%
of high quality	2	**2**	60%
welcoming, hospitable	3	**3**	58%
open-minded, tolerant, international	5	**4**	55%
authentic, real	4	**5**	55%
dynamic, modern	8	**6**	51%
attractive, appealing	6	**7**	50%
surprising	10	**8**	45%
service oriented	9	**9**	45%
varied, diversified	11	**10**	42%
sustainable	14	**11**	41%
exclusive, luxurious	7	**12**	38%
not overcrowded / insider tip	13	**13**	36%
lively, trendy	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.

Source: LFT Brand & Potential Study, 2024.

Spontaneous associations with Luxembourg

Source: LFT Brand & Potential Study, 2024.

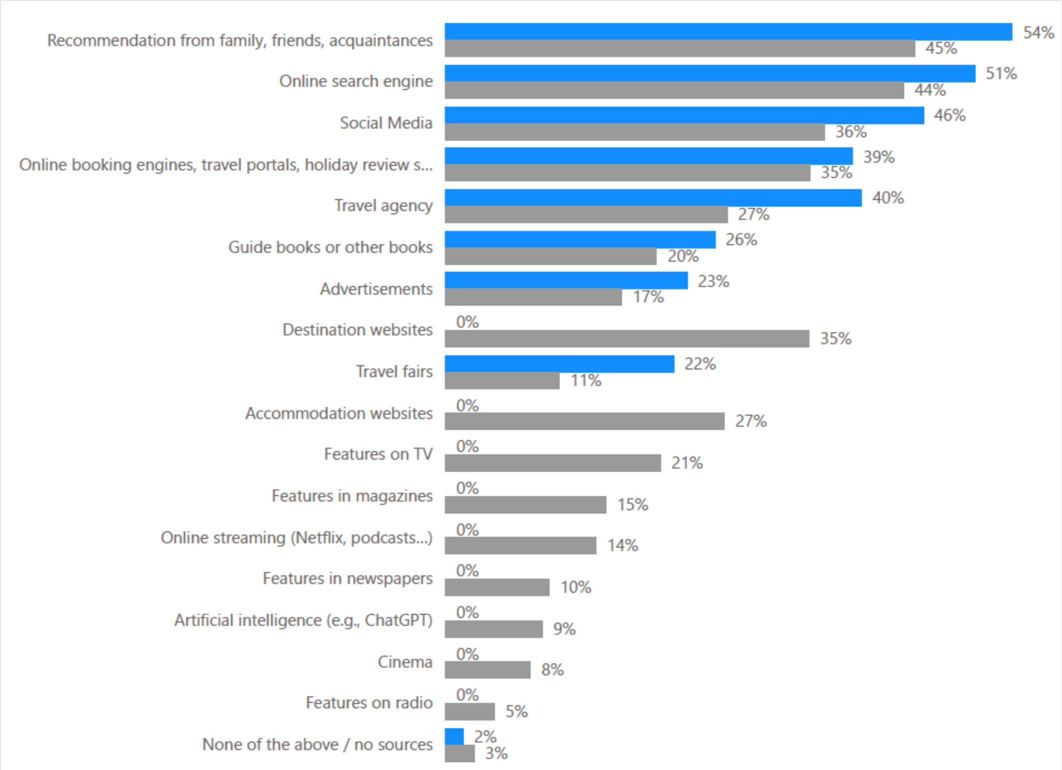
Trip organisation and preferences (1)

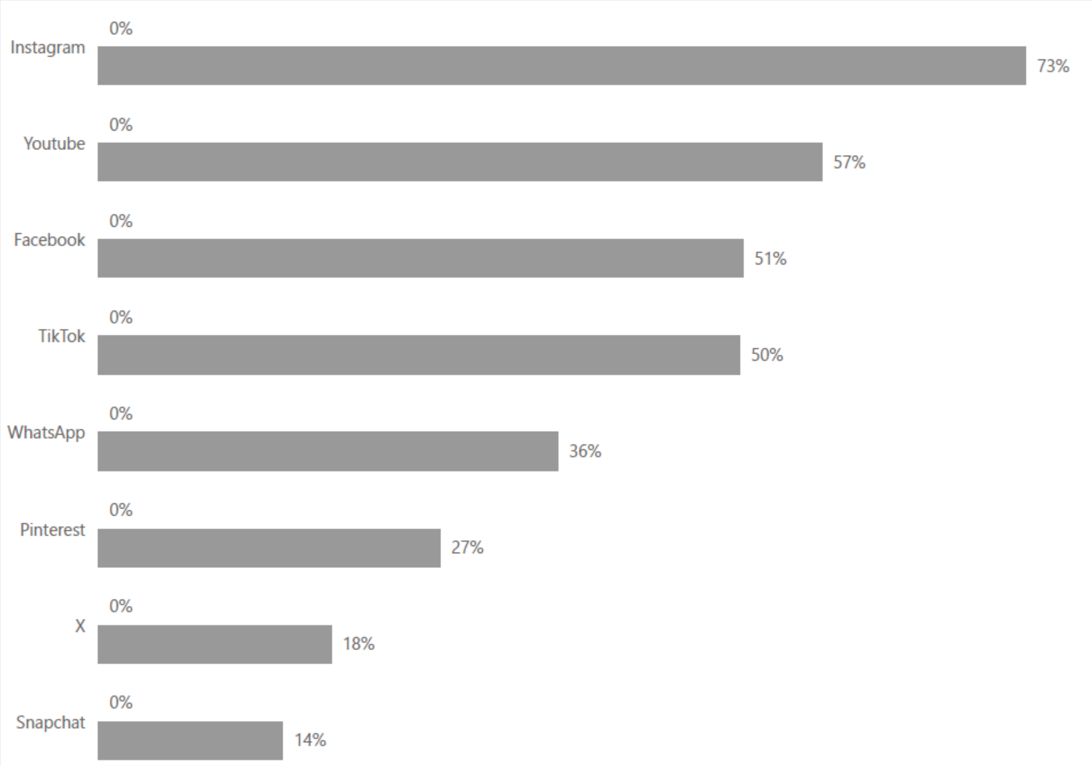
— Average **European source markets**, total vs. Portugal

Portugal

All inbound

Preferred sources of travel inspiration



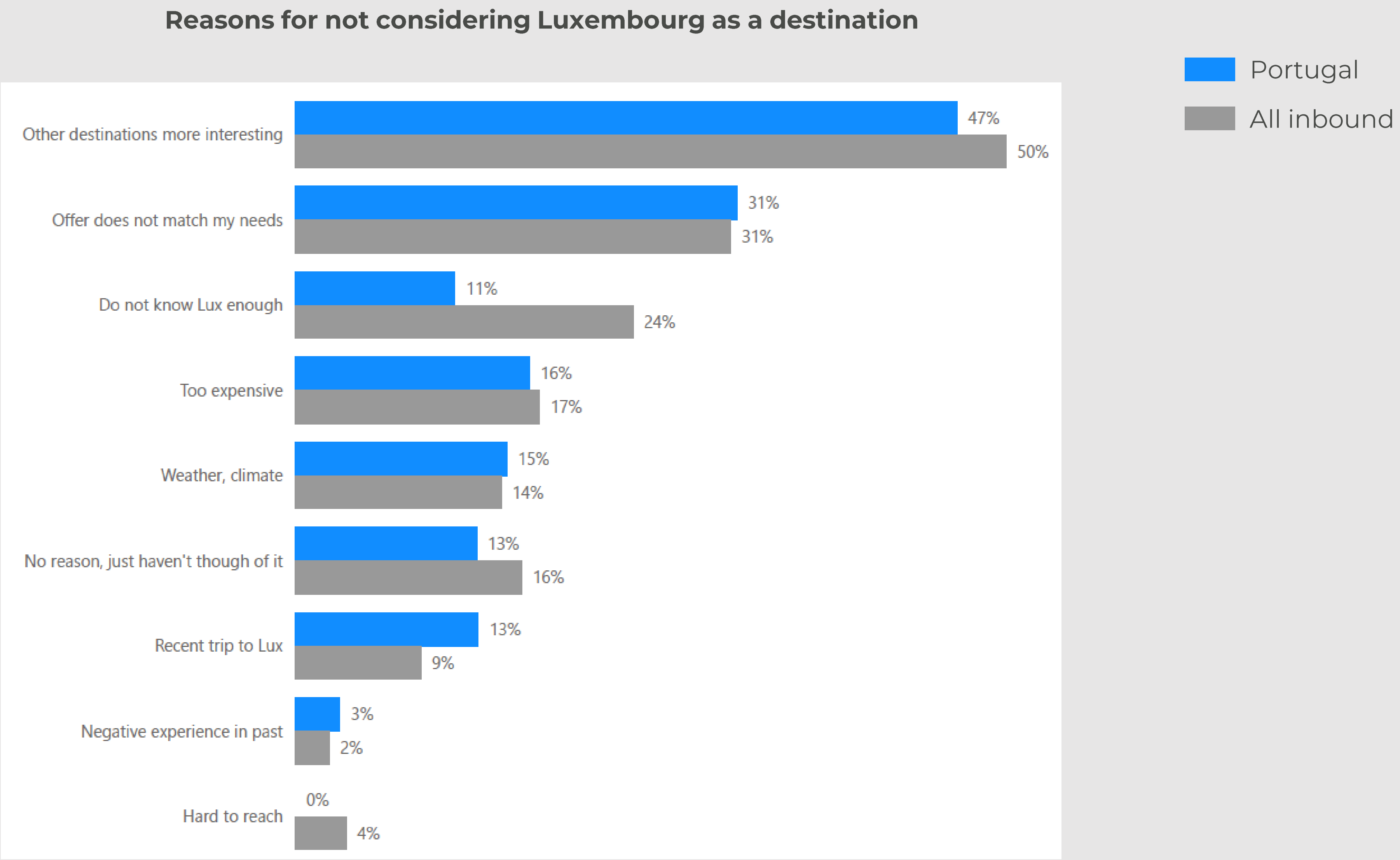


Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent to Luxembourg)

Source: LFT Brand & Potential Study, 2024.

Trip organisation and preferences (2)

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

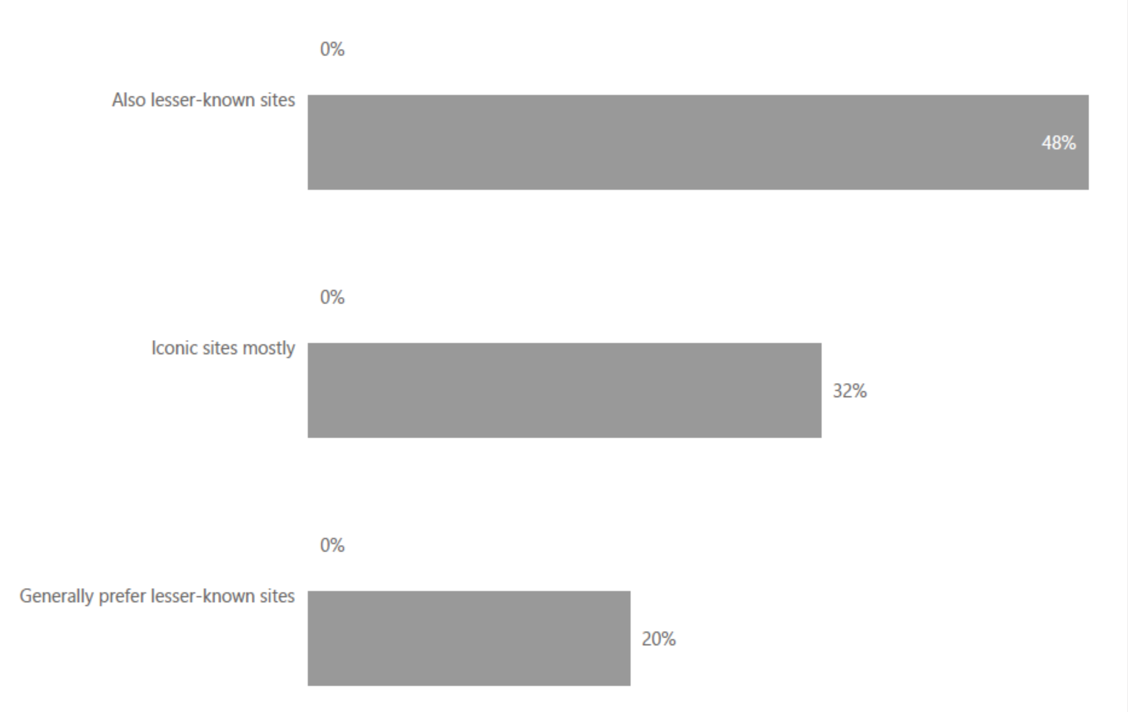


Source: LFT Brand & Potential Study, 2024.

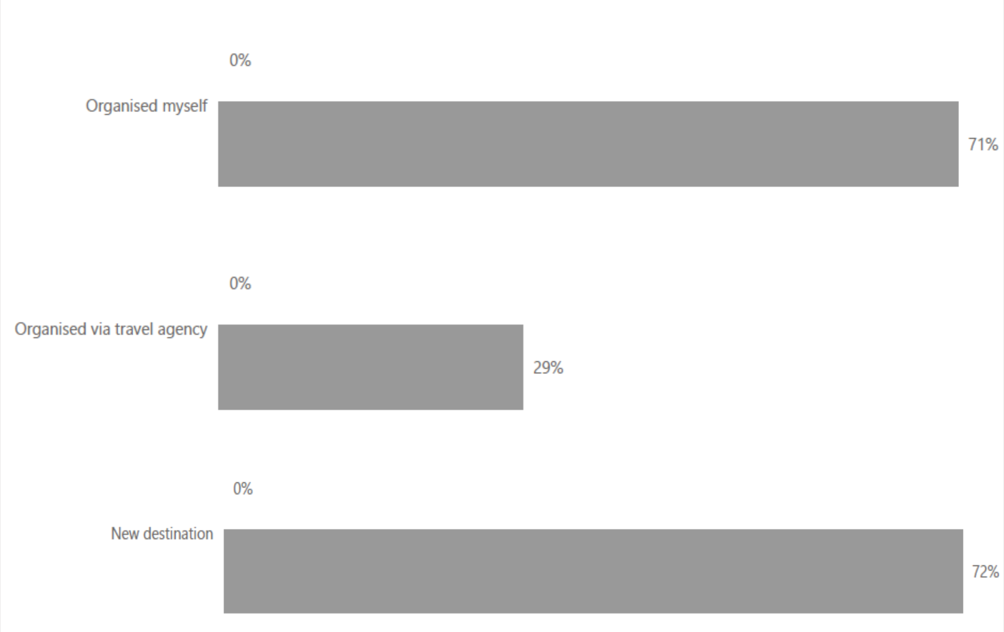
Trip organisation and preference (3)

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

General preference for visiting iconic vs. lesser-known sites



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



Portugal

All inbound

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.

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