



Luxembourg for Tourism

Market profile

PORTUGAL

2025

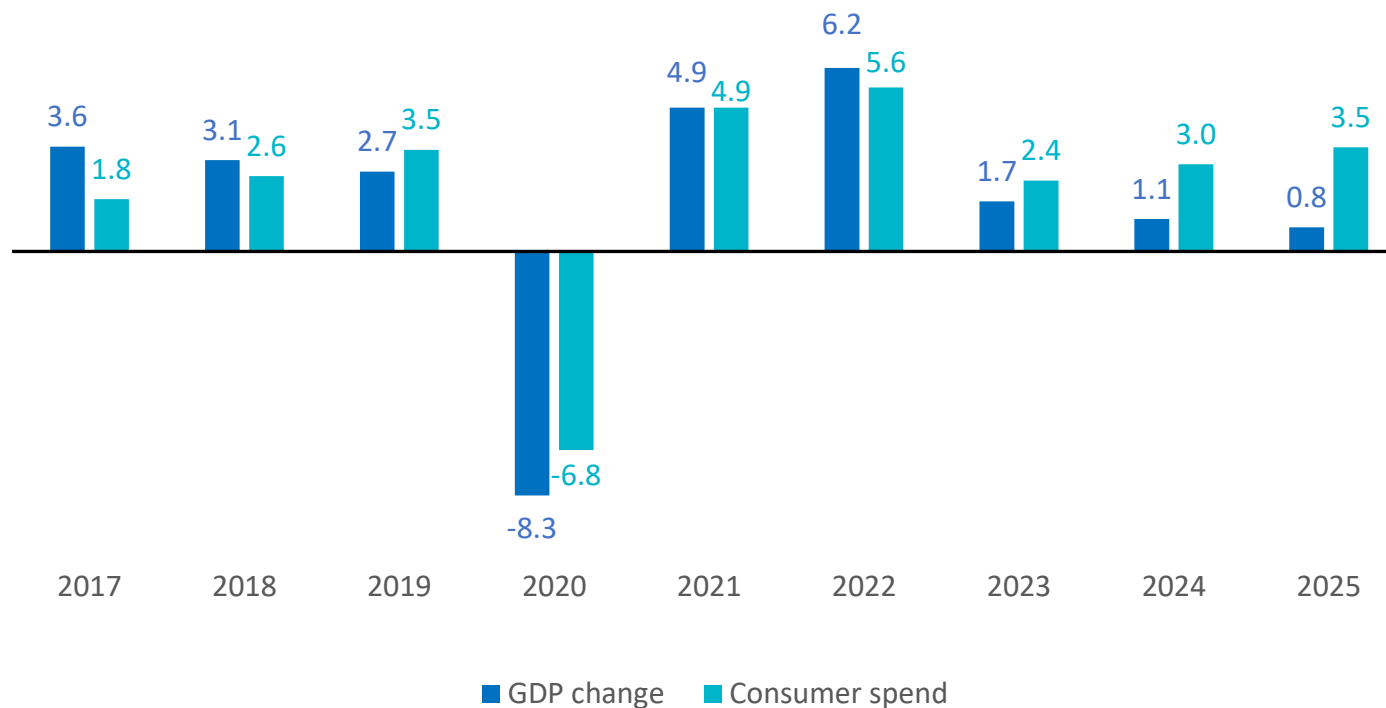


Economic indicators & General Travel Demand

Economic indicators – General travel demand



GDP and consumer spending, % annual change



Economy & population

GDP (PPP, \$) per capita
42,577

Unemployment (%)
6.0

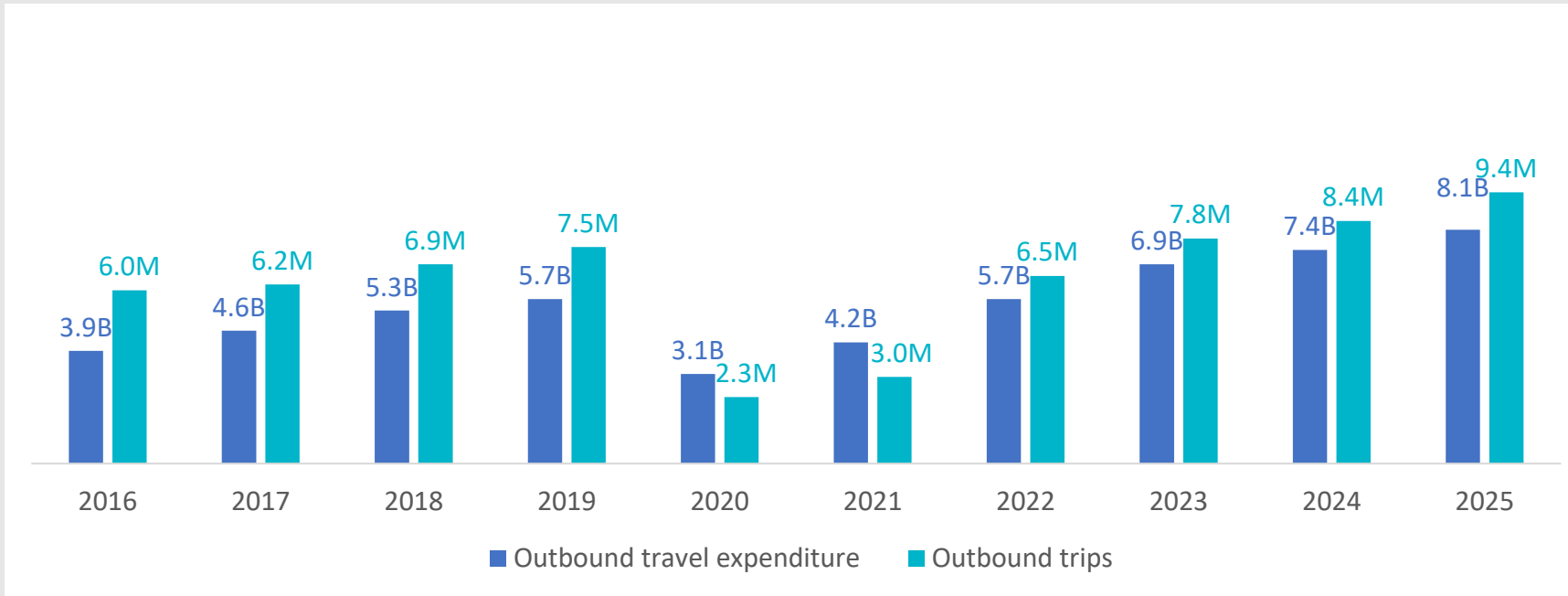
Inflation(%)
2.3

Population
10,411,834

Economic indicators – General travel demand



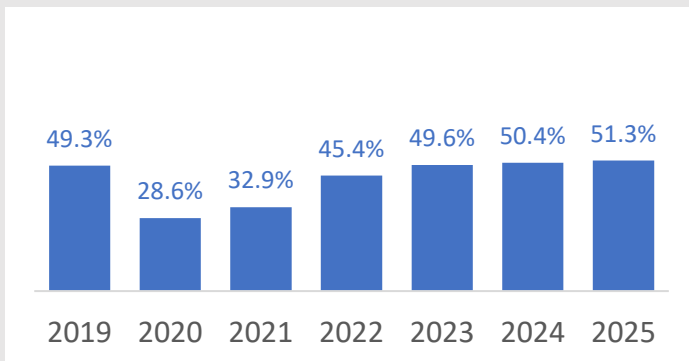
Outbound trips and travel expenditure



Outbound travel intensity
0.90 trips
per inhabitant (2025)

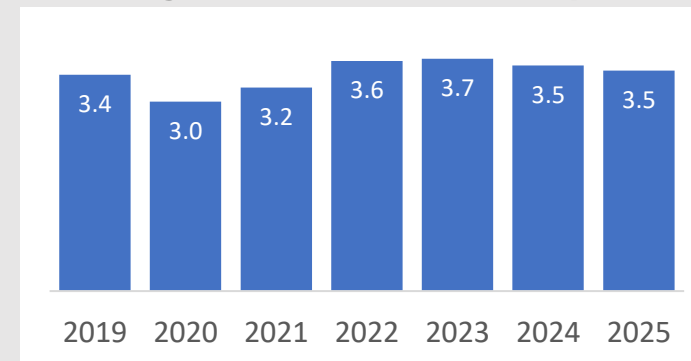
Average spend
per outbound trip (2025)
862 \$

Share of outbound travel, % all nights



Share of leisure,
% all outbound trips
(2025)
90%

Average length of stay, nights, all outbound trips





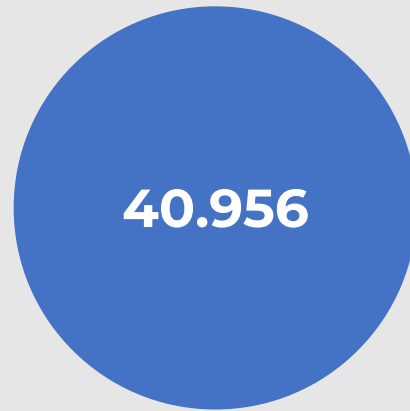
Arrivals & nights in paid accommodation

Nights in paid accommodation

2025 and 2019-2025

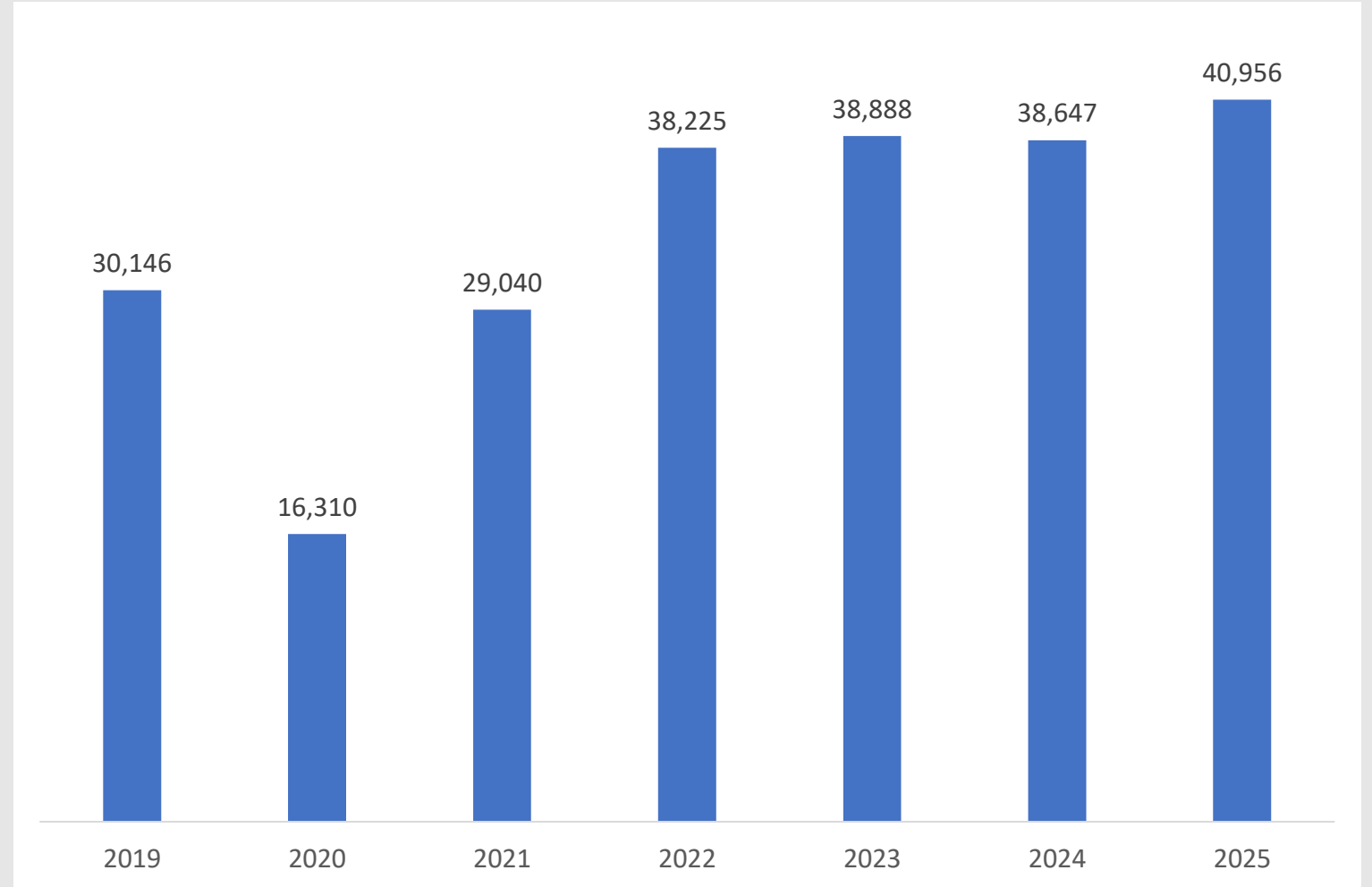


**Nights,
paid accommodation, 2025**



+6% (vs. 2024)

+36% (vs. 2019)

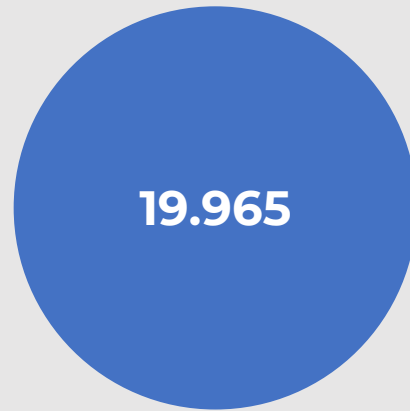


Arrivals in paid accommodation

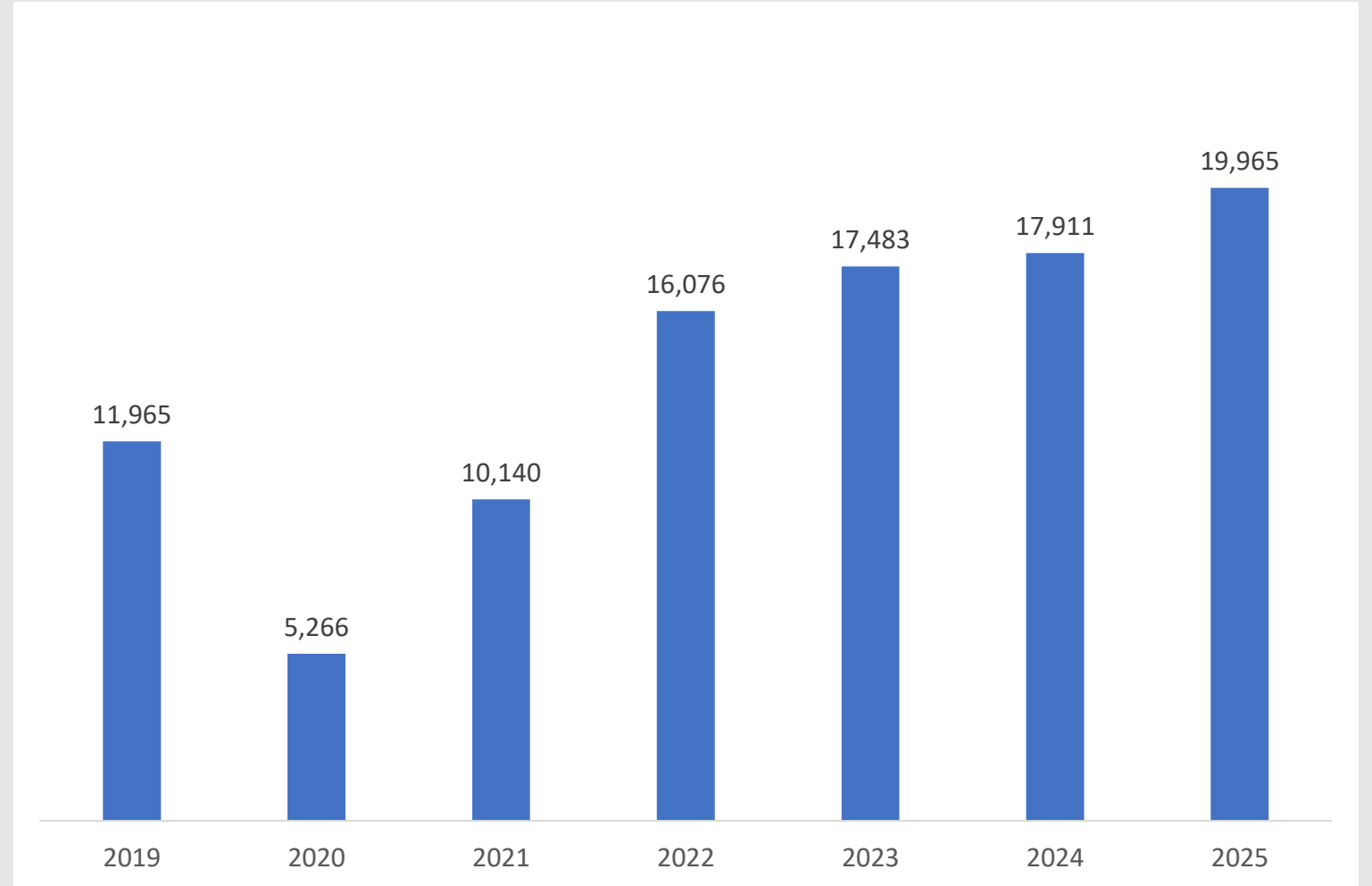
2025 and 2019-2025



Arrivals,
paid accommodation, 2025



+11% (vs. 2024)
+67% (vs. 2019)



Length of stay, paid accommodation

2025 and 2019-2025

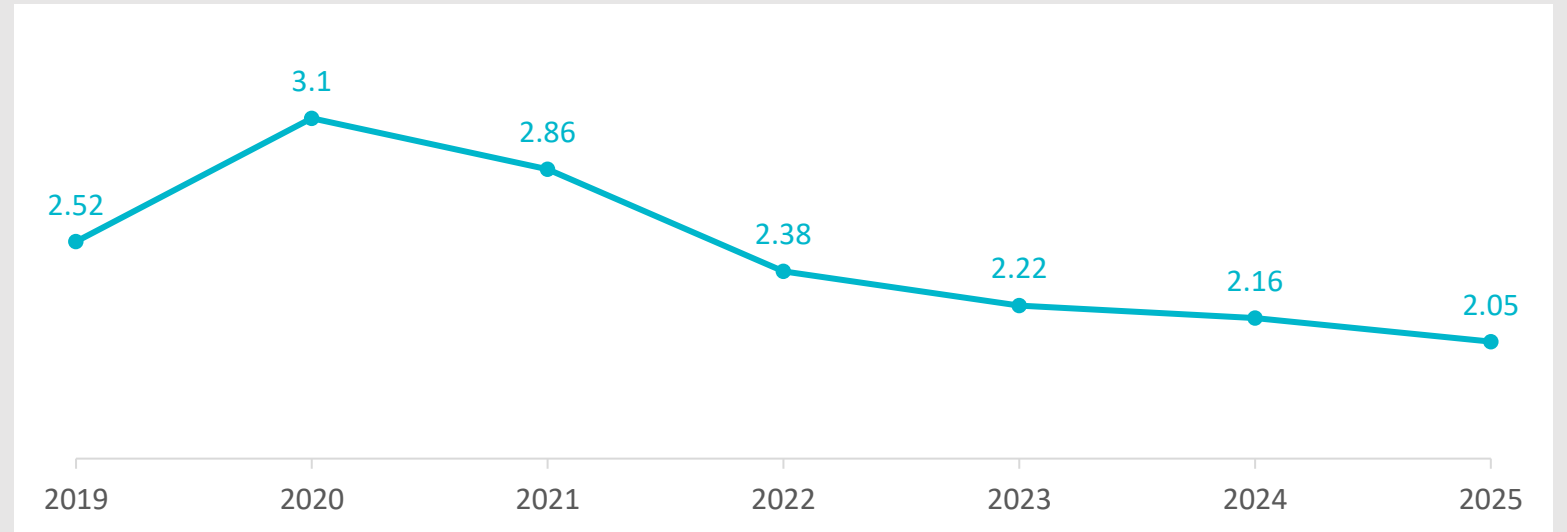


Average length of stay,
paid accommodation, 2025



-0.11 nights (vs. 2024)

-0.47 nights (vs. 2019)

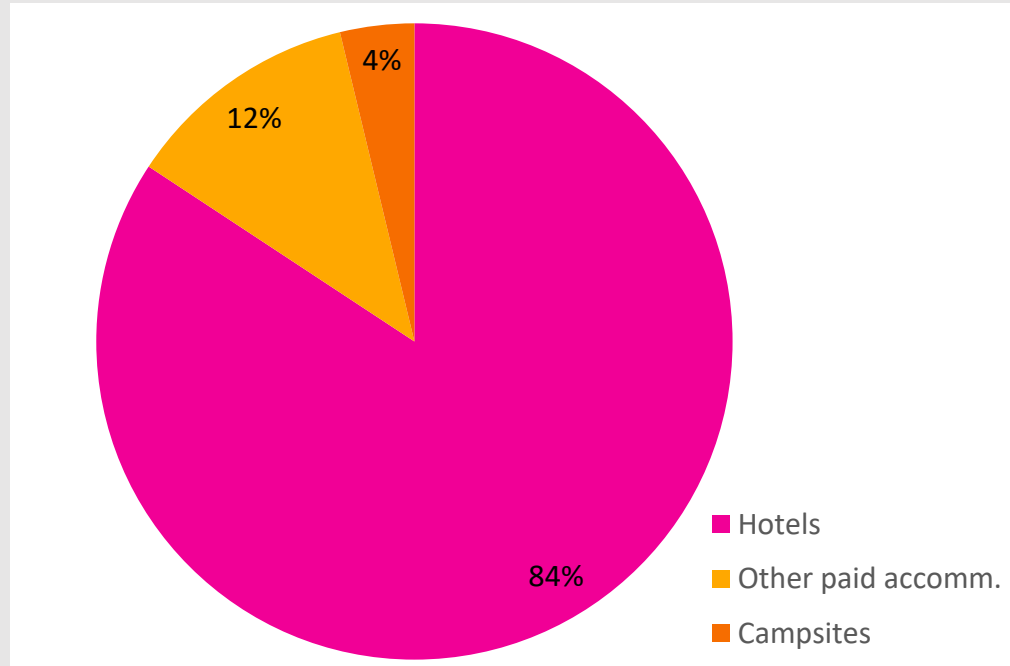


Nights & arrivals in paid accommodation

Type of accommodation, 2025

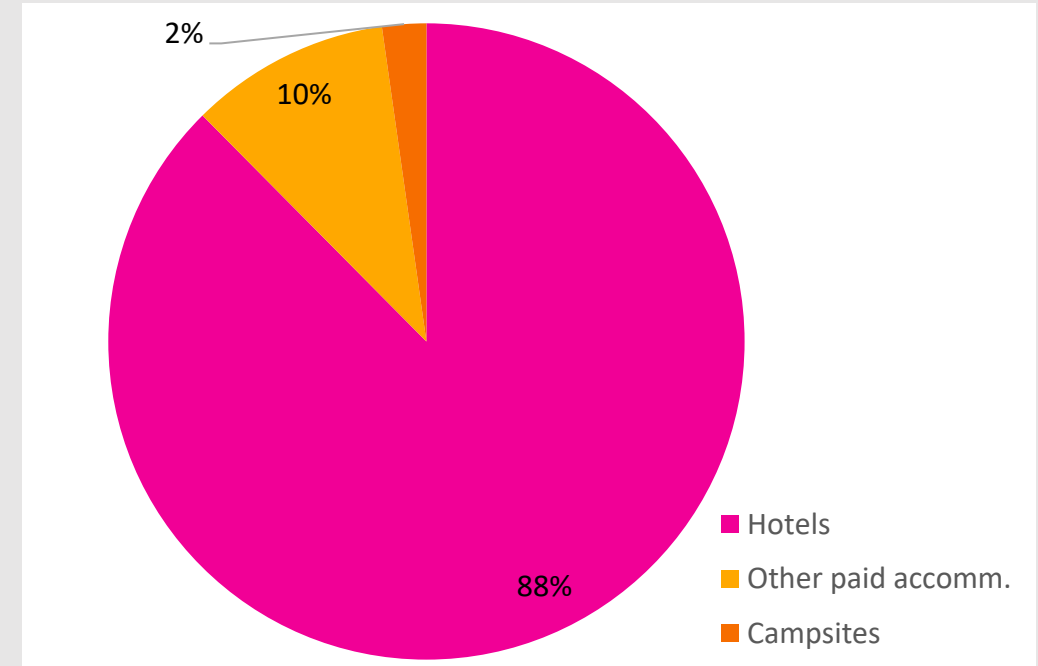


Nights,
paid accommodation, 2025



Hotels	34.512	+10% (vs. 2024)	+78% (vs. 2019)
Other paid accommodation	4.903	+4% (vs. 2024)	+60% (vs. 2019)
Campsites	1.541	-42% (vs. 2024)	-80% (vs. 2019)

Arrivals,
paid accommodation, 2025



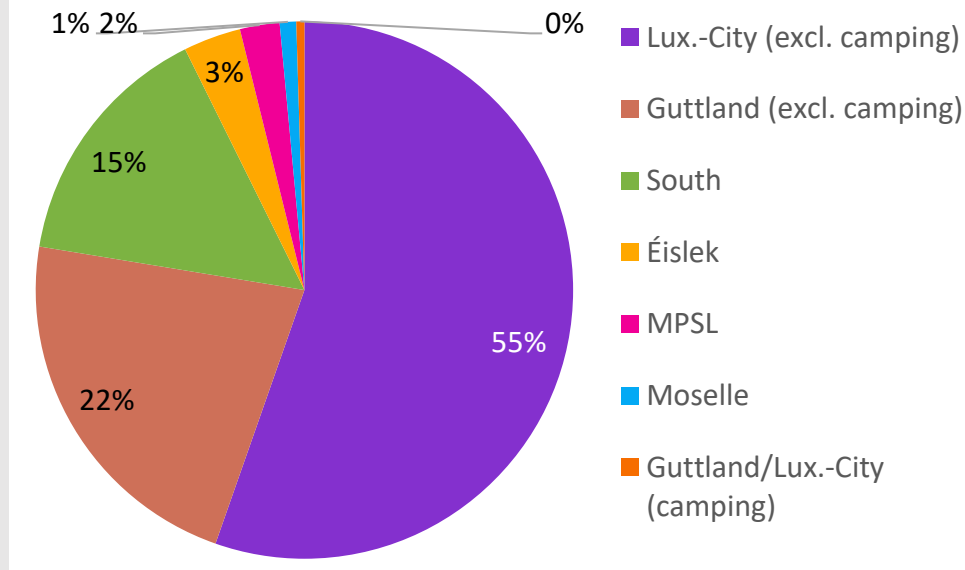
Hotels	17.484	+15% (vs. 2024)	+74% (vs. 2019)
Other paid accommodation	2.034	+3% (vs. 2024)	+39% (vs. 2019)
Campsites	447	-41% (vs. 2024)	-3% (vs. 2019)

Nights & arrivals in paid accommodation

Regions, 2025

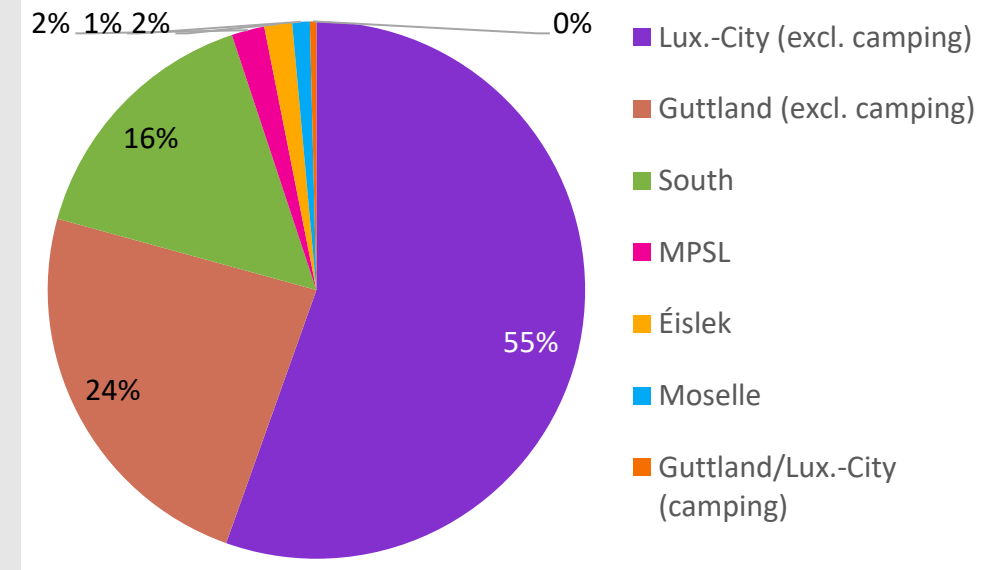


Nights, paid accommodation, 2025



Lux.-City (excl. camping)	22.677	+23% (vs. 2024)	+100% (vs. 2019)
Guttland (excl. camping)	9.102	+4% (vs. 2024)	+172% (vs. 2019)
South	6.178	-18% (vs. 2024)	-13% (vs. 2019)
Éislek	1.418	+17% (vs. 2024)	-80% (vs. 2019)
MPSL	977	-55% (vs. 2024)	+88% (vs. 2019)
Moselle	405	-19% (vs. 2024)	-33% (vs. 2019)
Guttland/Lux.-City (camping)	199	+188% (vs. 2024)	+134% (vs. 2019)

Arrivals, paid accommodation, 2025



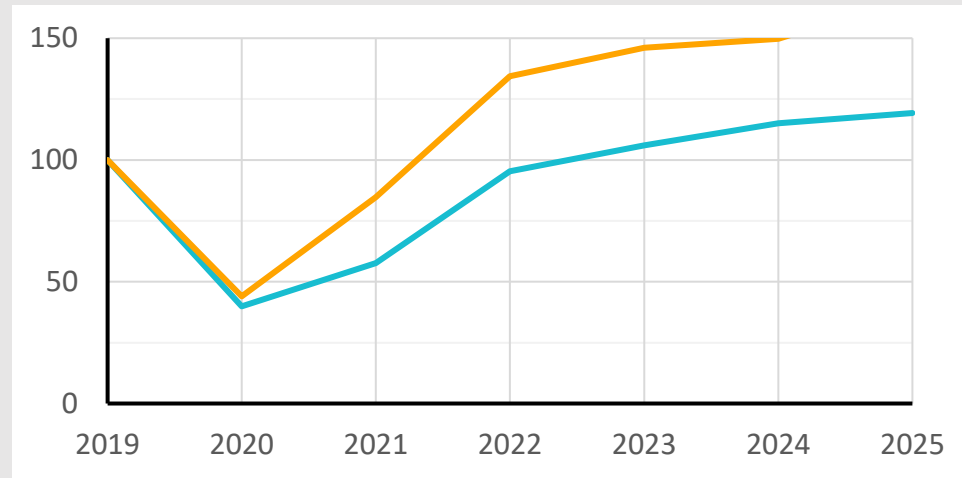
Lux.-City (excl. camping)	11.072	+24% (vs. 2024)	+98% (vs. 2019)
Guttland (excl. camping)	4.756	+1% (vs. 2024)	+157% (vs. 2019)
South	3.120	+9% (vs. 2024)	-7% (vs. 2019)
MPSL	395	-50% (vs. 2024)	+98% (vs. 2019)
Éislek	334	-2% (vs. 2024)	-49% (vs. 2019)
Moselle	210	-15% (vs. 2024)	-13% (vs. 2019)
Guttland/Lux.-City (camping)	78	+62% (vs. 2024)	+62% (vs. 2019)

Arrivals in paid accommodation

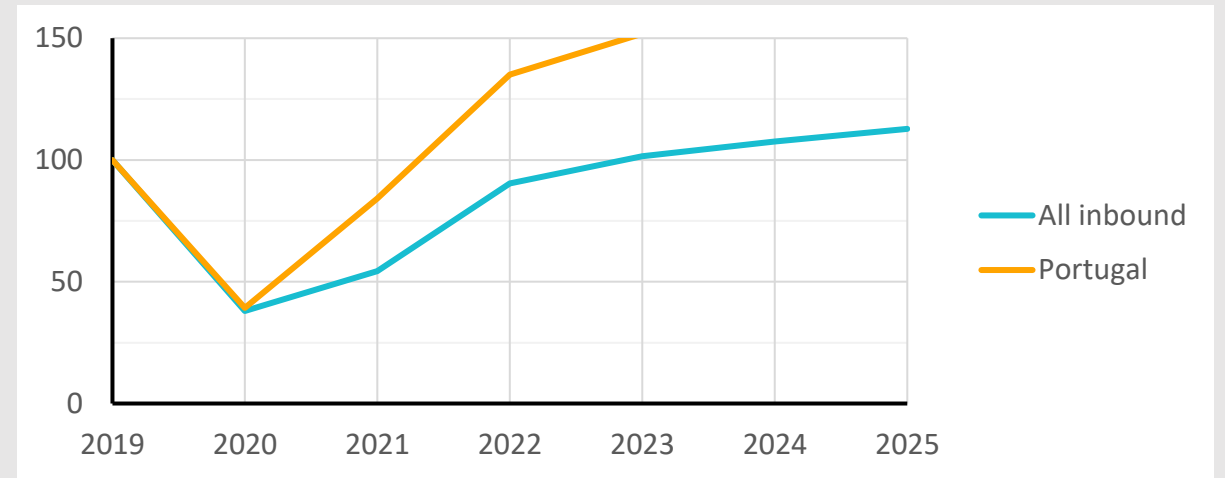
Trends 2019-2025



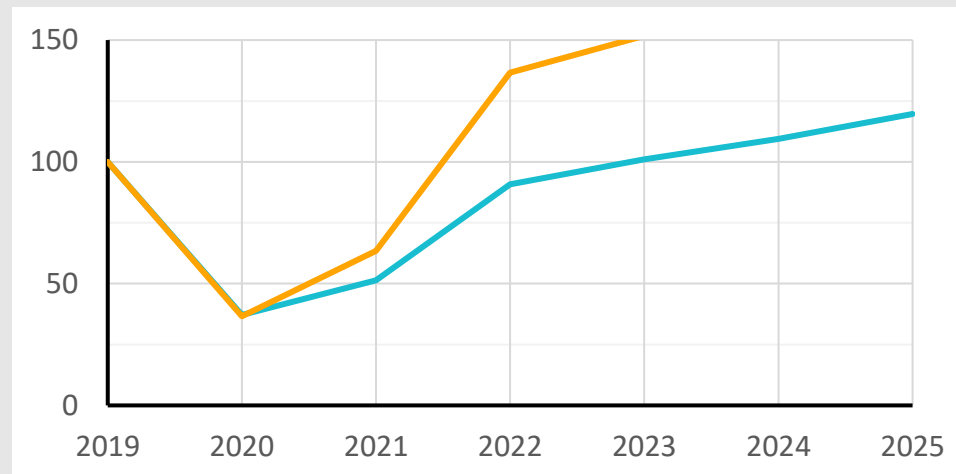
All paid accommodation, national (2019 = Index 100)



Hotels, national (2019 = Index 100)



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

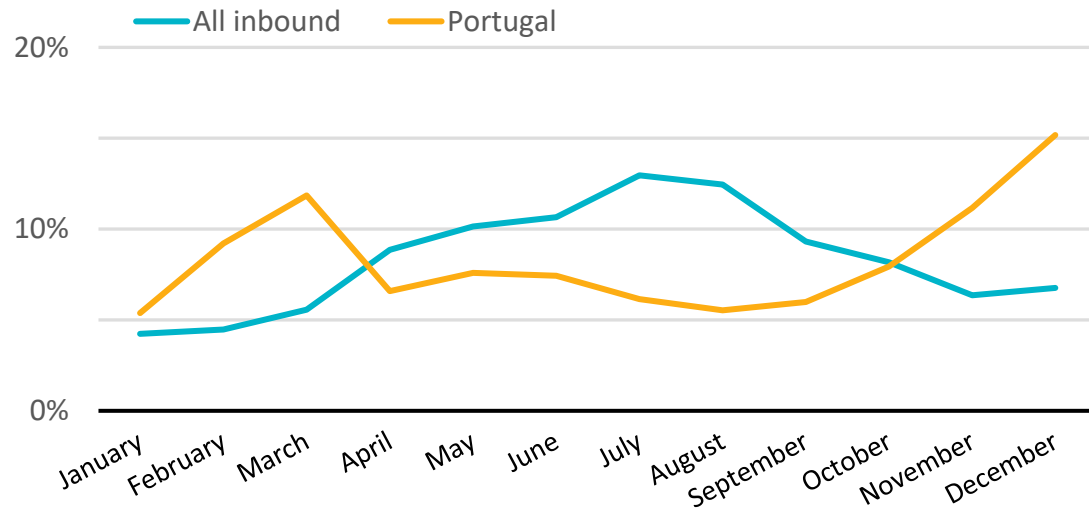


Arrivals in paid accommodation

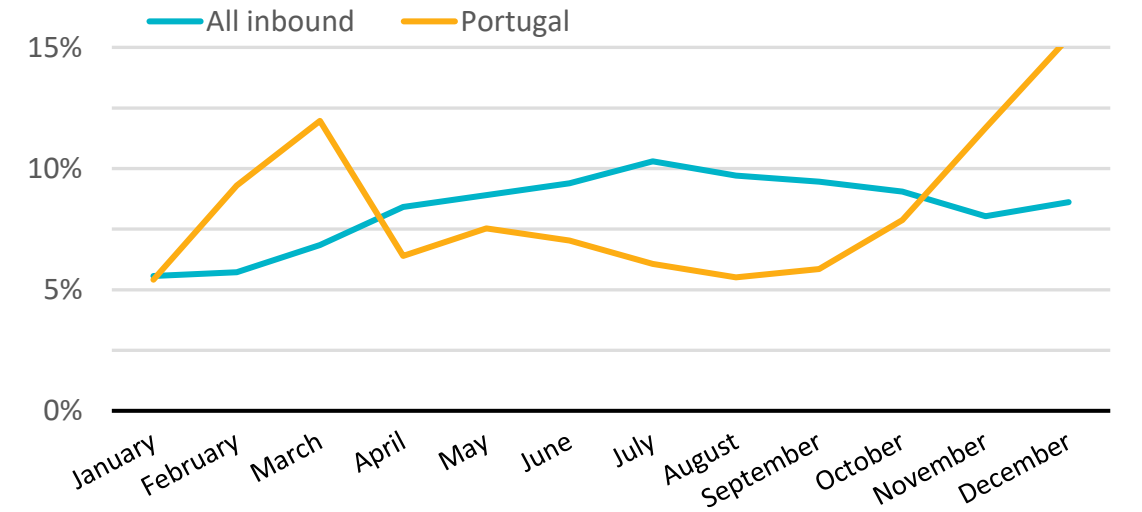
Seasonality



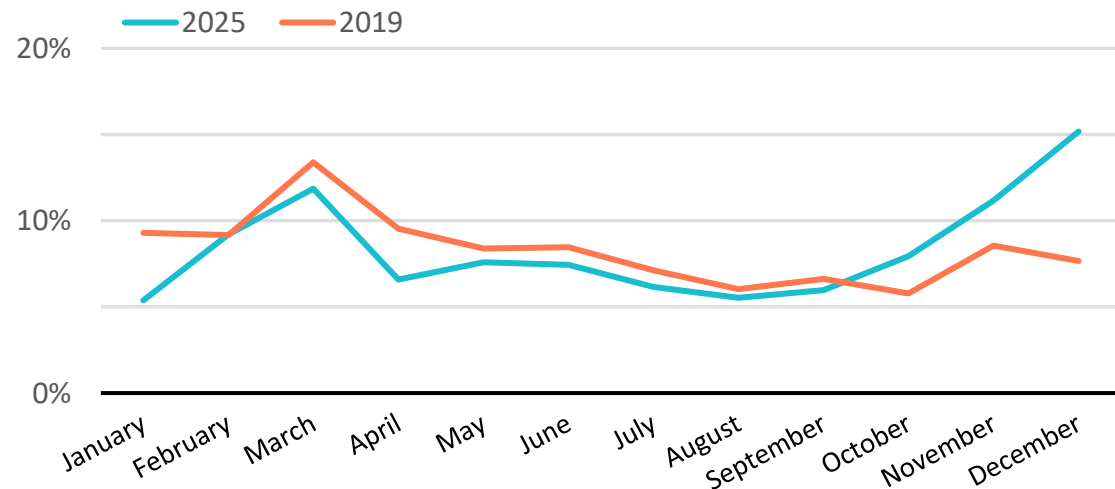
All paid accommodation, 2025



Hotels, 2025



All paid accommodation, arrivals from Portugal



Short-term rentals

2025 and 2019-2025

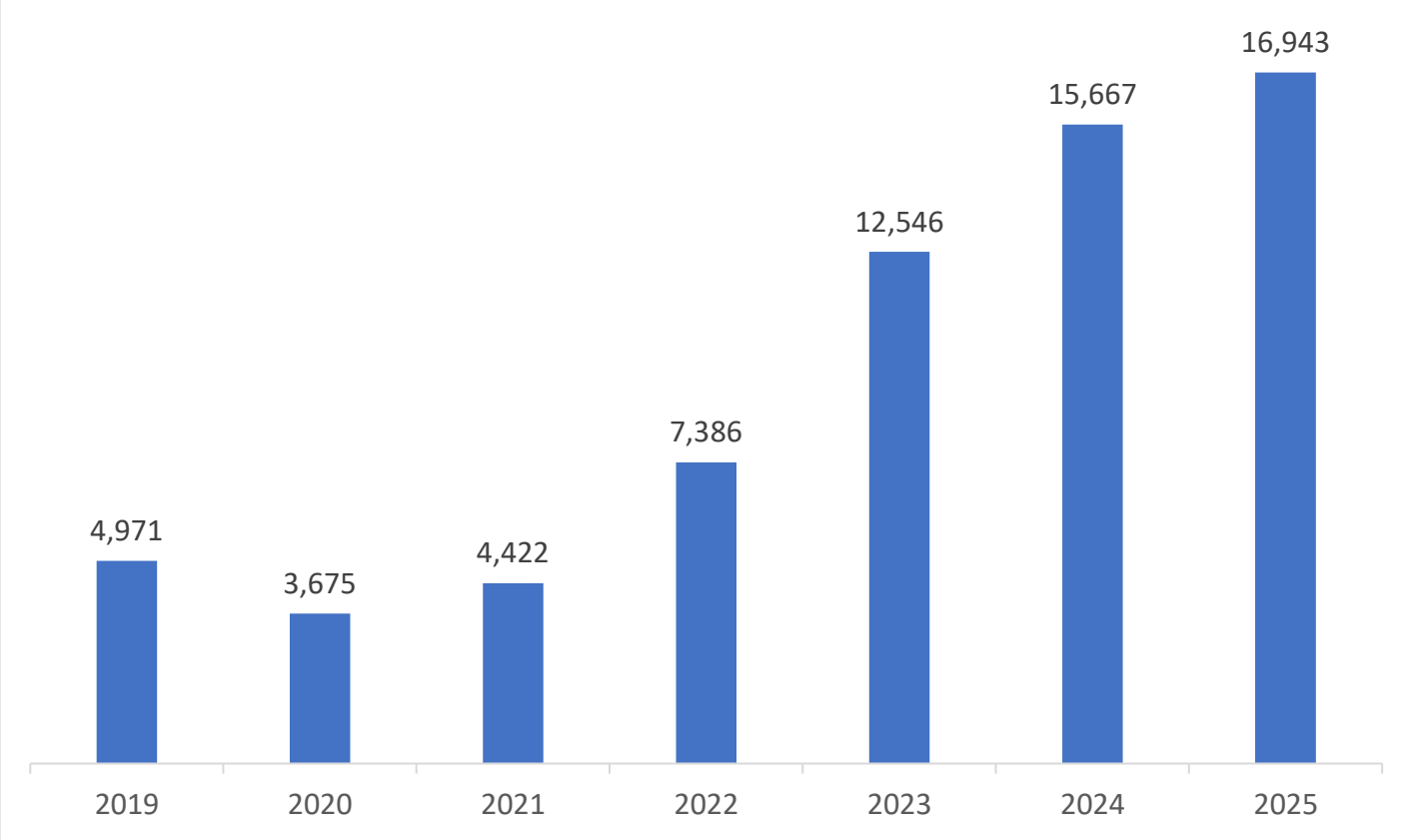


Nights,
Short-term rentals, 2025



+8% (vs. 2024)
+241% (vs. 2019)

Nights,
Short-term rentals, 2019-2025





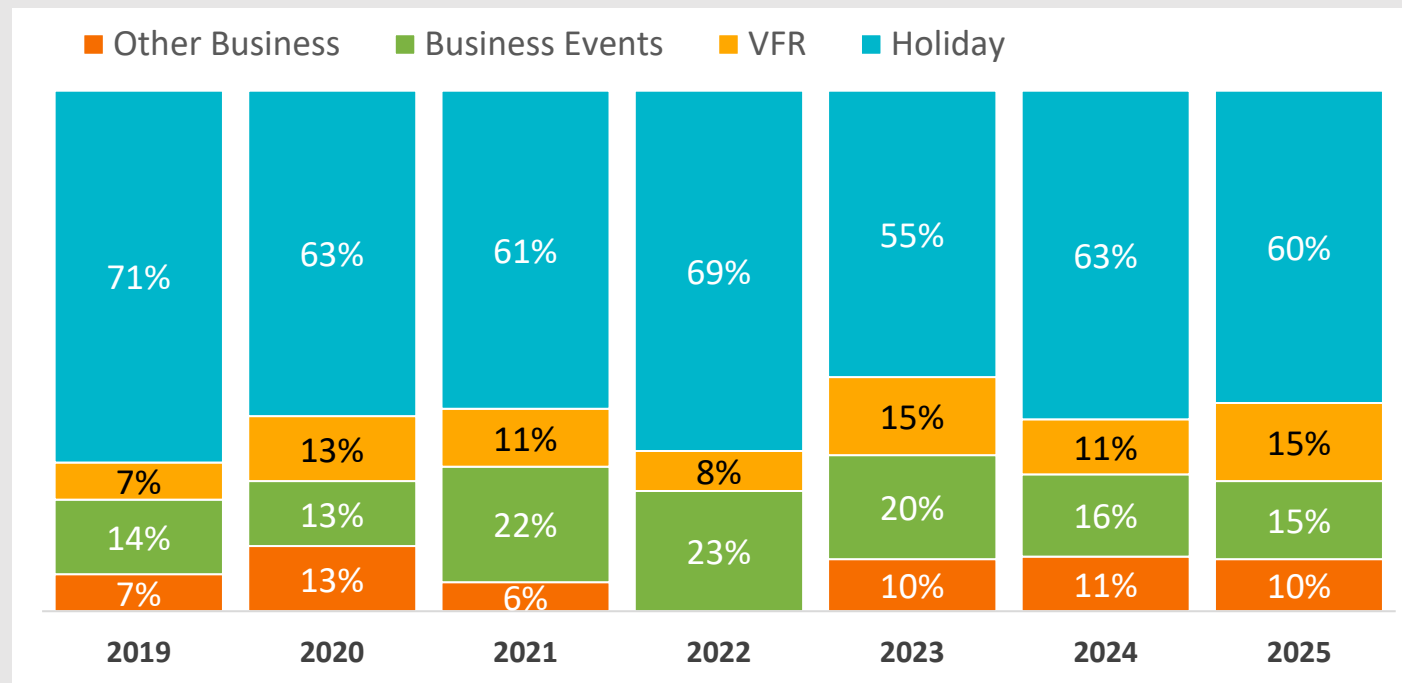
Characteristics of inbound trips



Portuguese trips to Luxembourg with overnight (all accommodation)

Purpose of visit, 2019-2025

Portuguese trips to Luxembourg, 2019-2025



2025

Portugal to
Luxembourg

Europe to
Luxembourg

Holiday	60%	62%
VFR	15%	12%
Business Events	15%	17%
Other Business	10%	8%

Inbound same-day trips to Luxembourg

2025



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



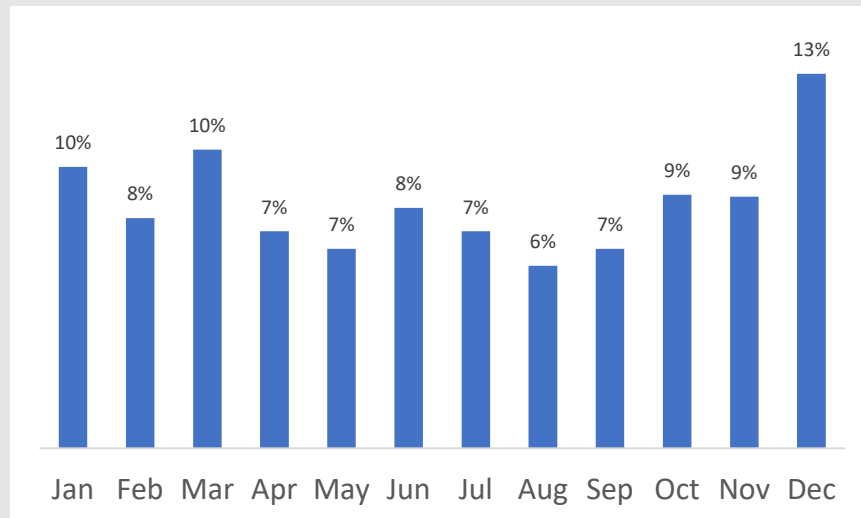
-20% (vs. 2024)

**Average length
of same-day trips**



+0,9 h (vs. 2024)

**Seasonality
% of same-day trips**



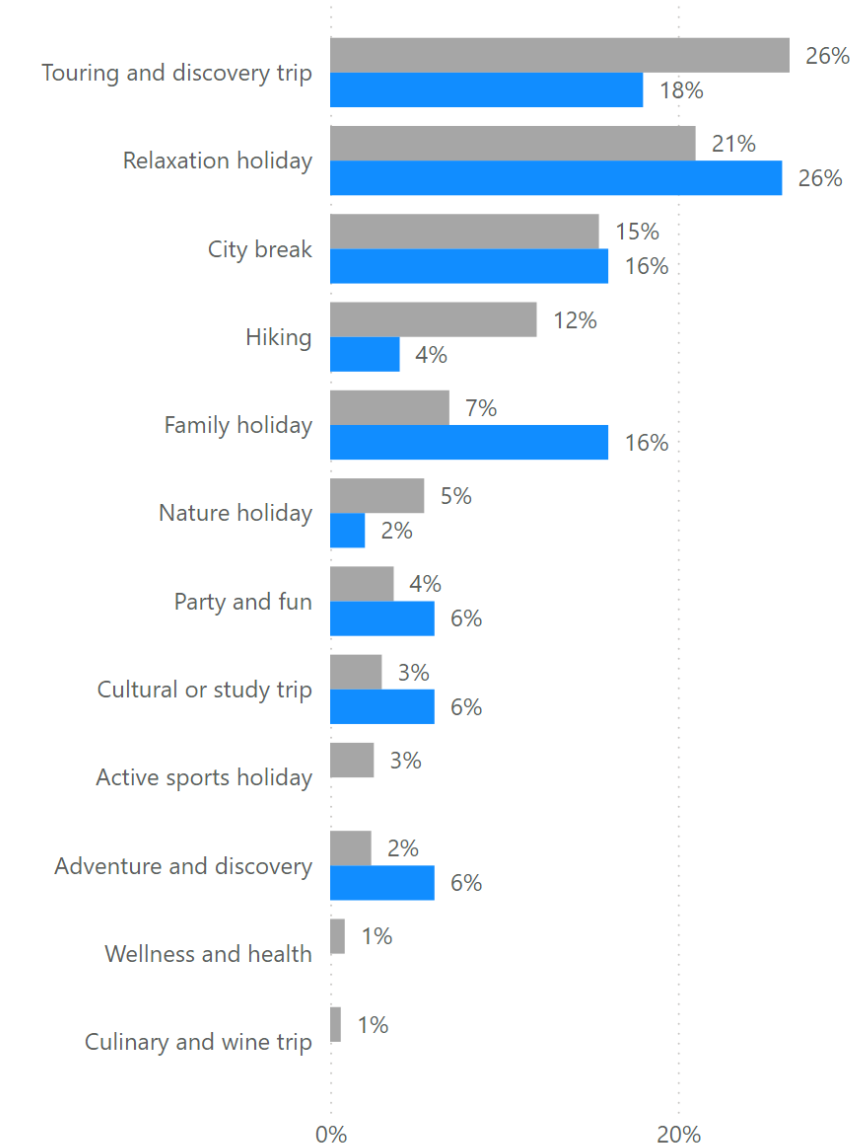


Travel behaviour of inbound leisure visitors

Main holiday types

Leisure overnight visitors, 2024–2025

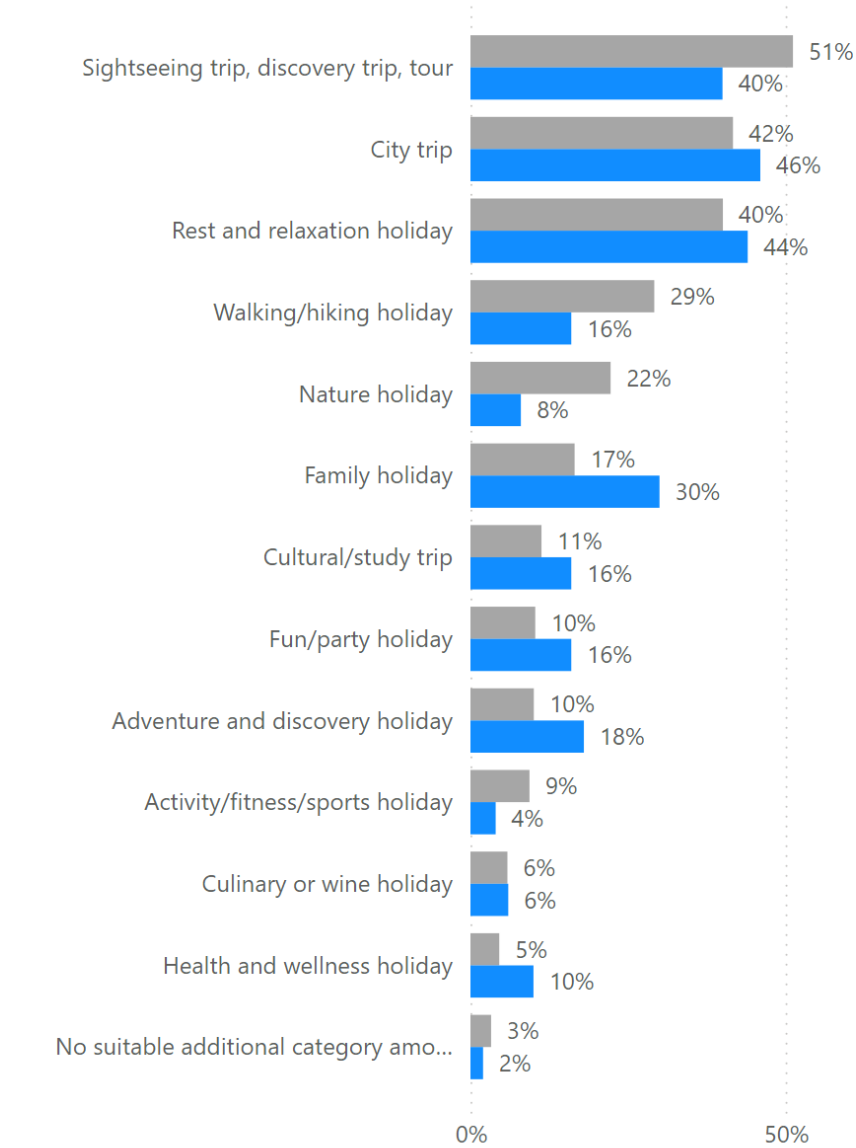
● All inbound ● Portugal



All holiday types

Leisure overnight visitors, 2024–2025

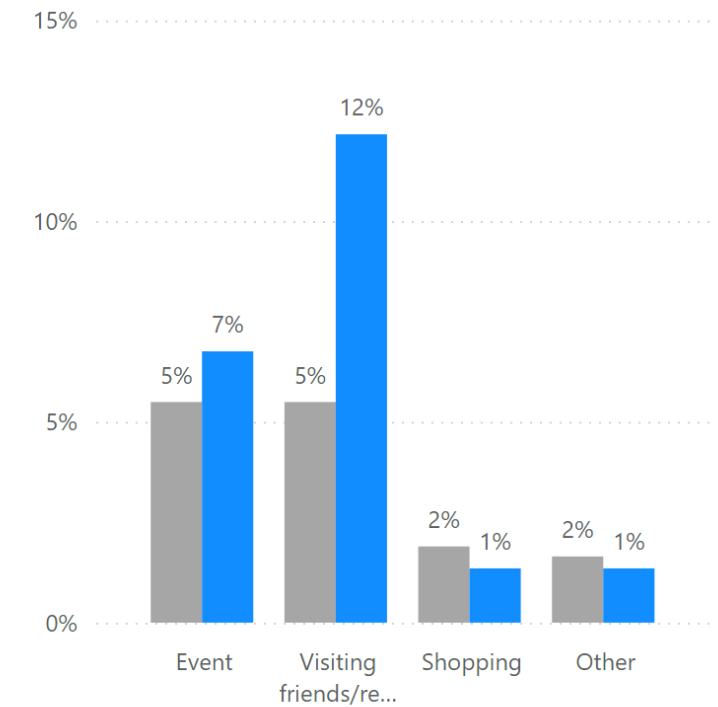
● All inbound ● Portugal



Main purpose of overnight trip (if not holiday)

Leisure overnight visitors, 2024–2025

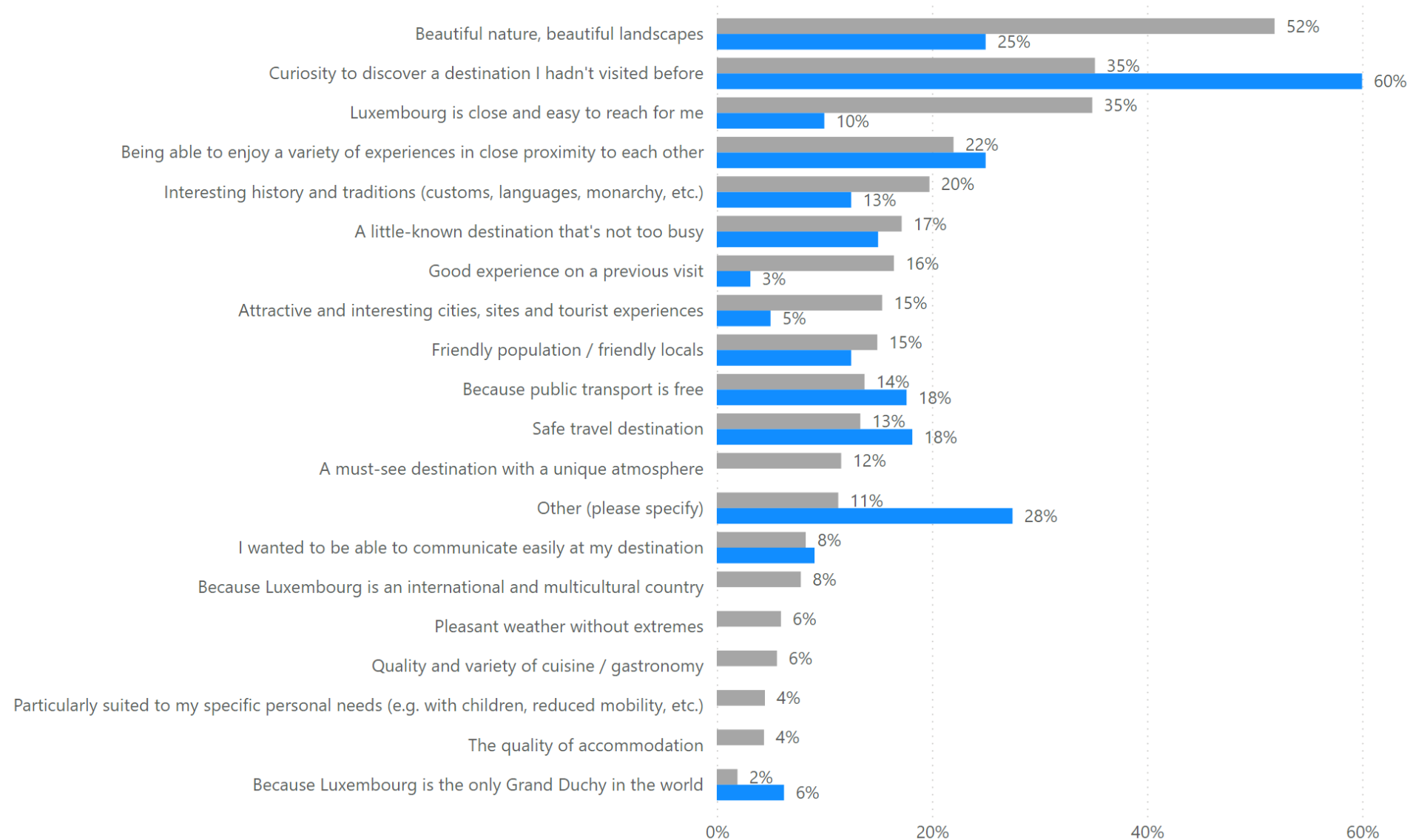
● All inbound ● Portugal



Reasons for choosing Luxembourg

Leisure overnight visitors, 2022–2025

● All inbound ● Portugal



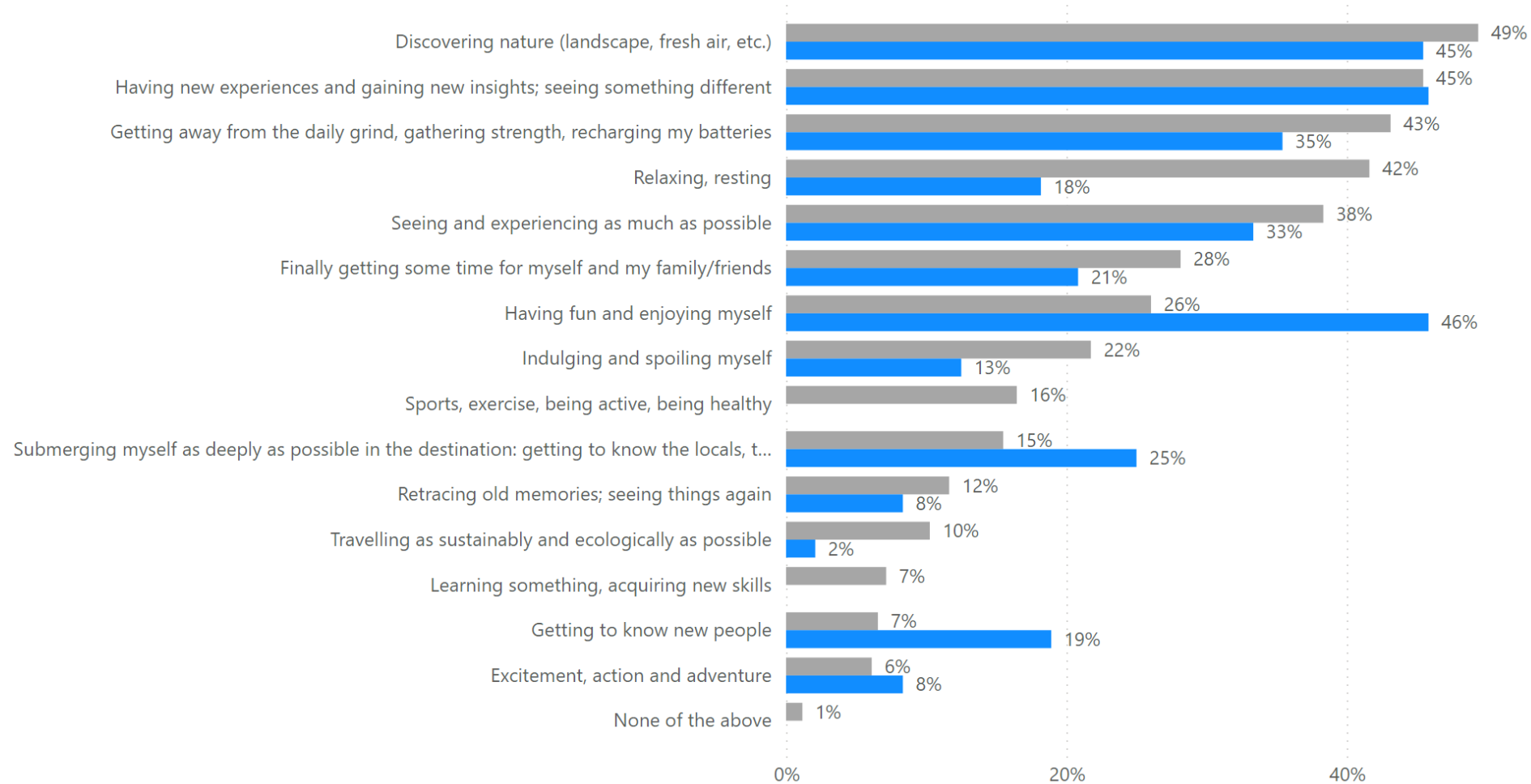
Low N for this question for segment(s): Portugal (N=40)



Travel Motives

Leisure overnight visitors, 2022–2025

● All inbound ● Portugal

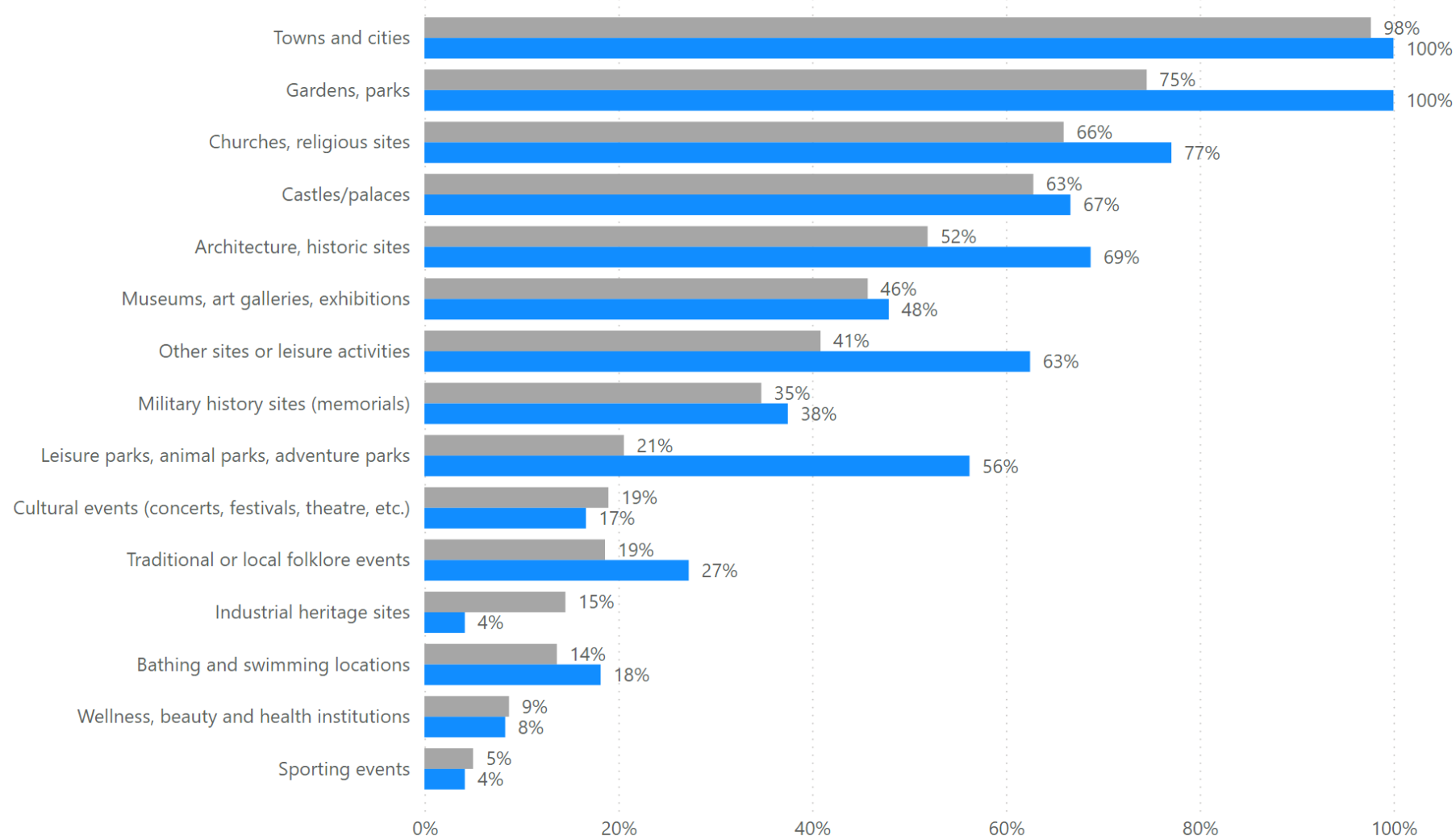


Low N for this question for segment(s): Portugal (N=48)

Places visited

Leisure overnight visitors, 2022–2025

● All inbound ● Portugal

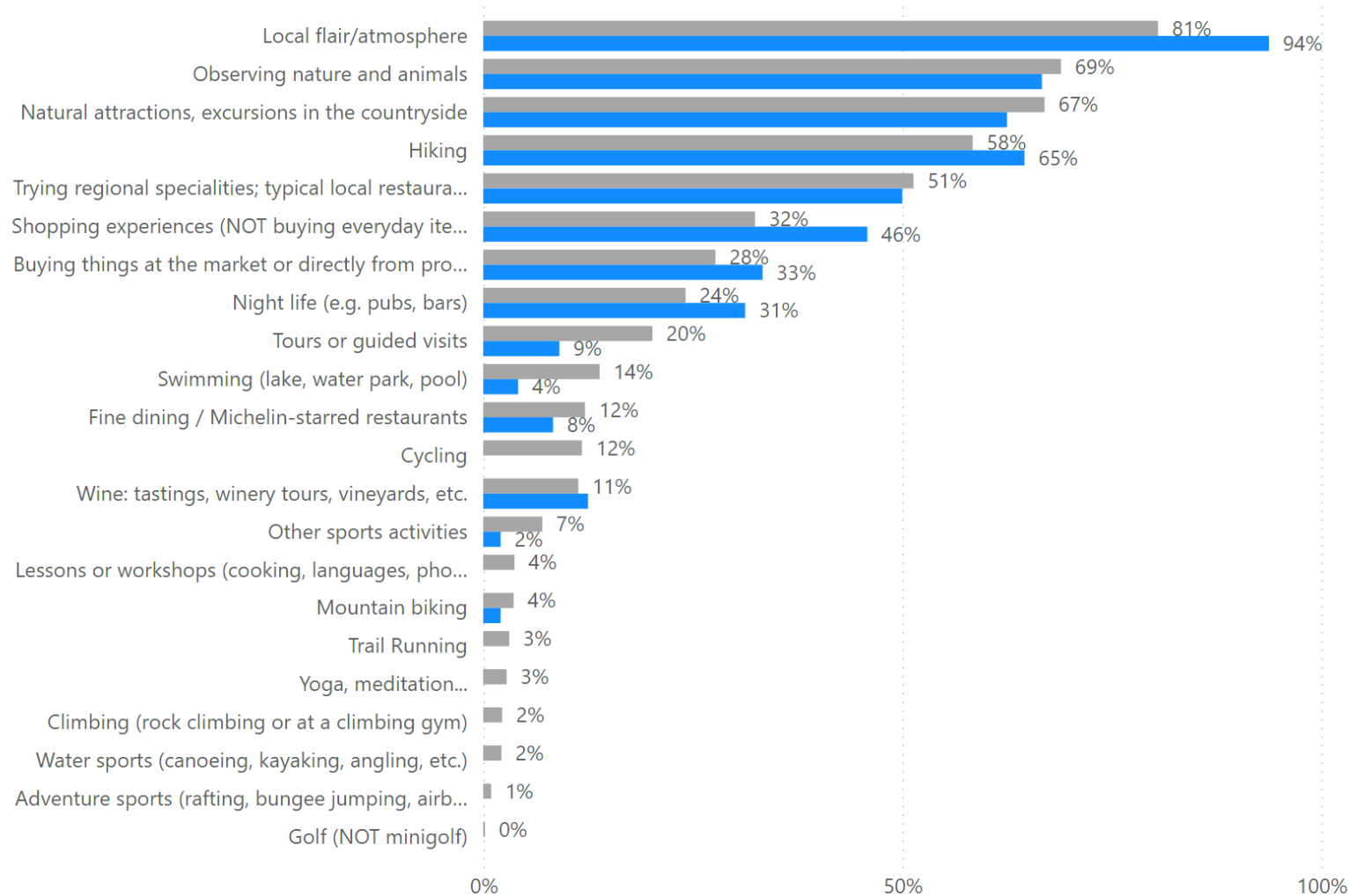


Low N for this question for segment(s): Portugal (N=48)

Activities (sporting and non-sporting)

Leisure overnight visitors, 2022–2025

● All inbound ● Portugal



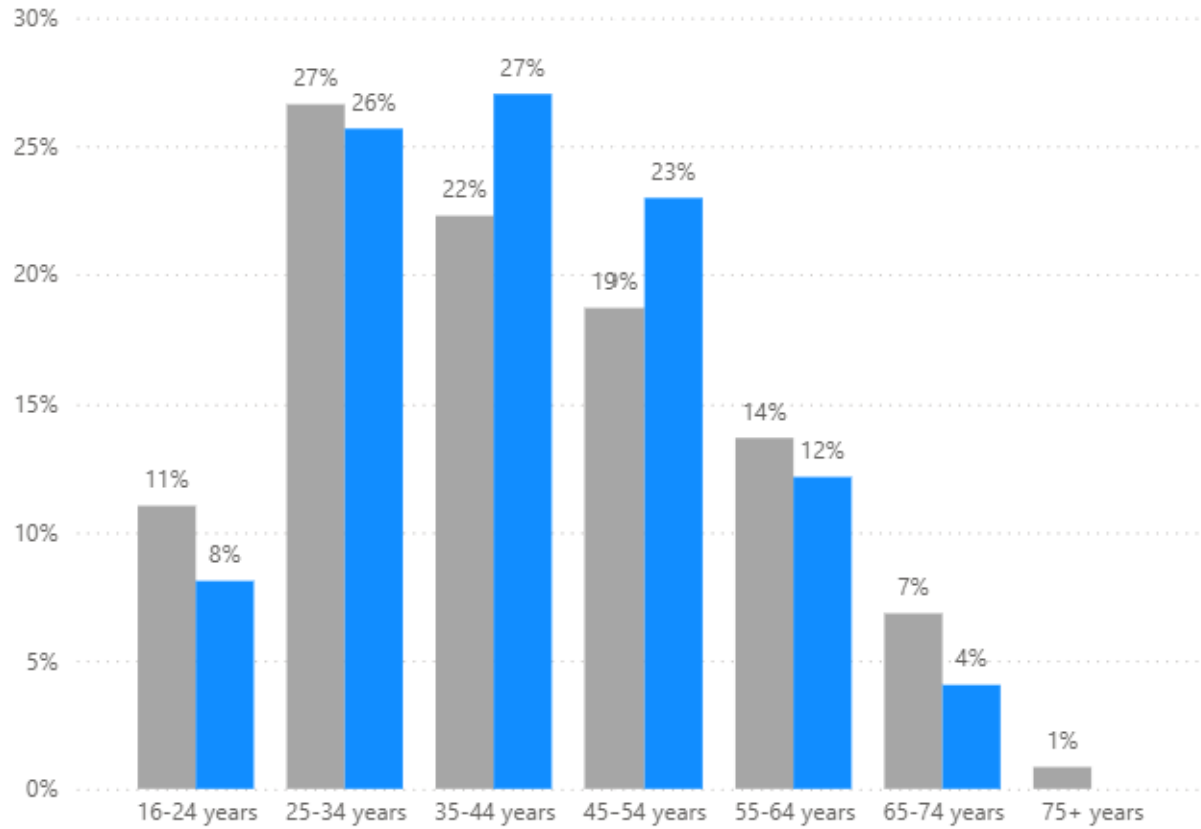
Low N for this question for segment(s): Portugal (N=48)



Age

Leisure overnight visitors, 2024–2025

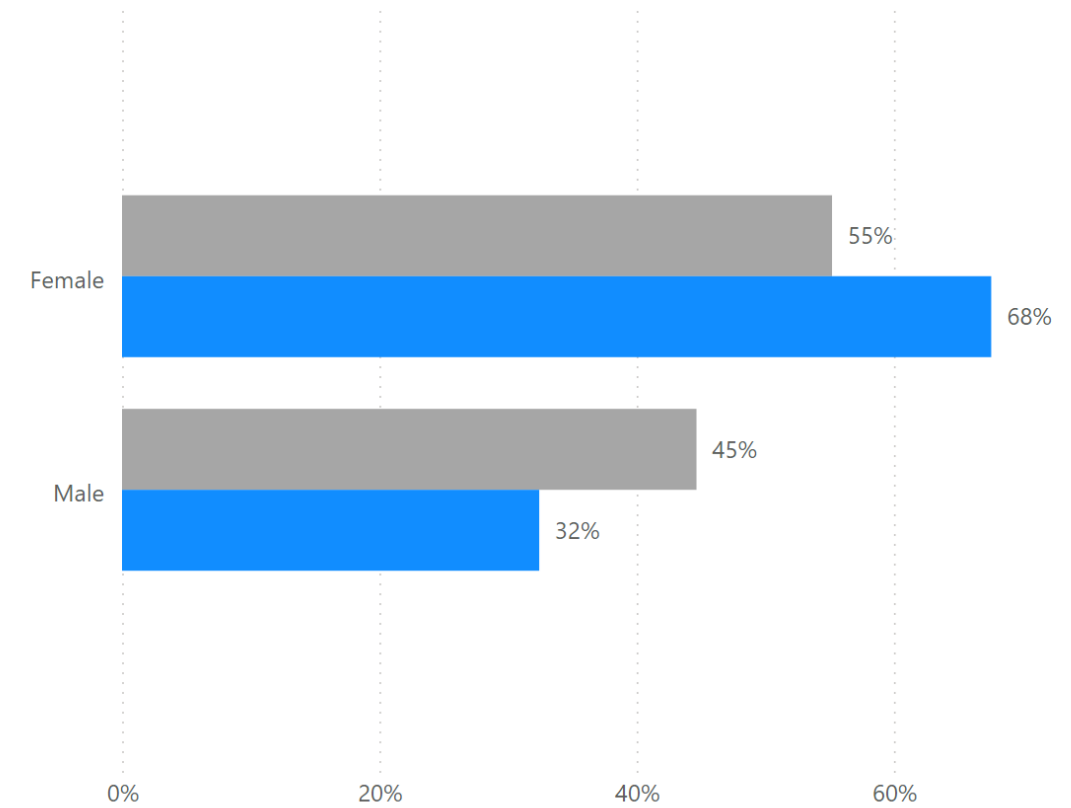
● All inbound ● Portugal



Gender

Leisure overnight visitors, 2024–2025

● All inbound ● Portugal

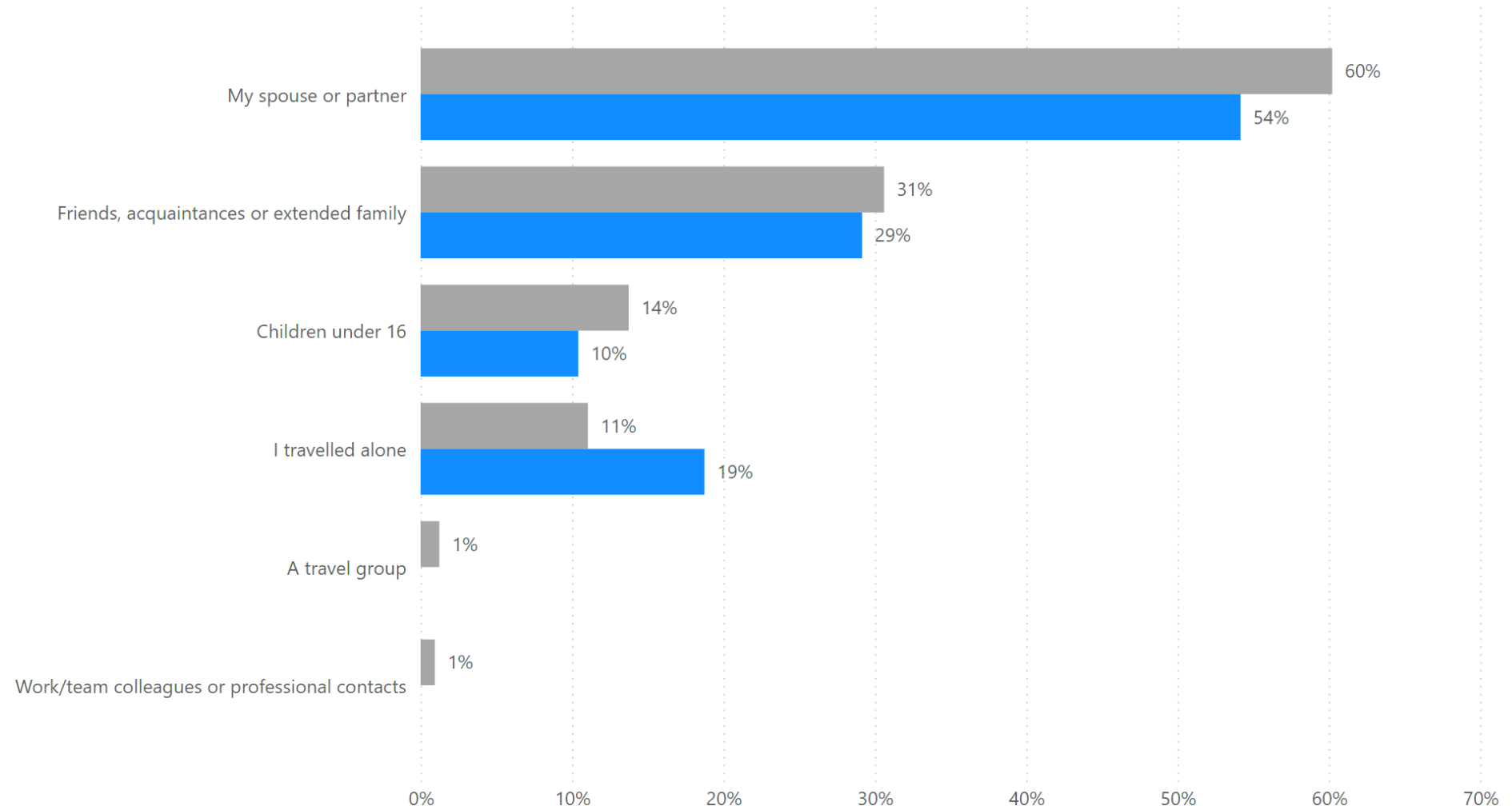




Travel party

Leisure overnight visitors, 2022–2025

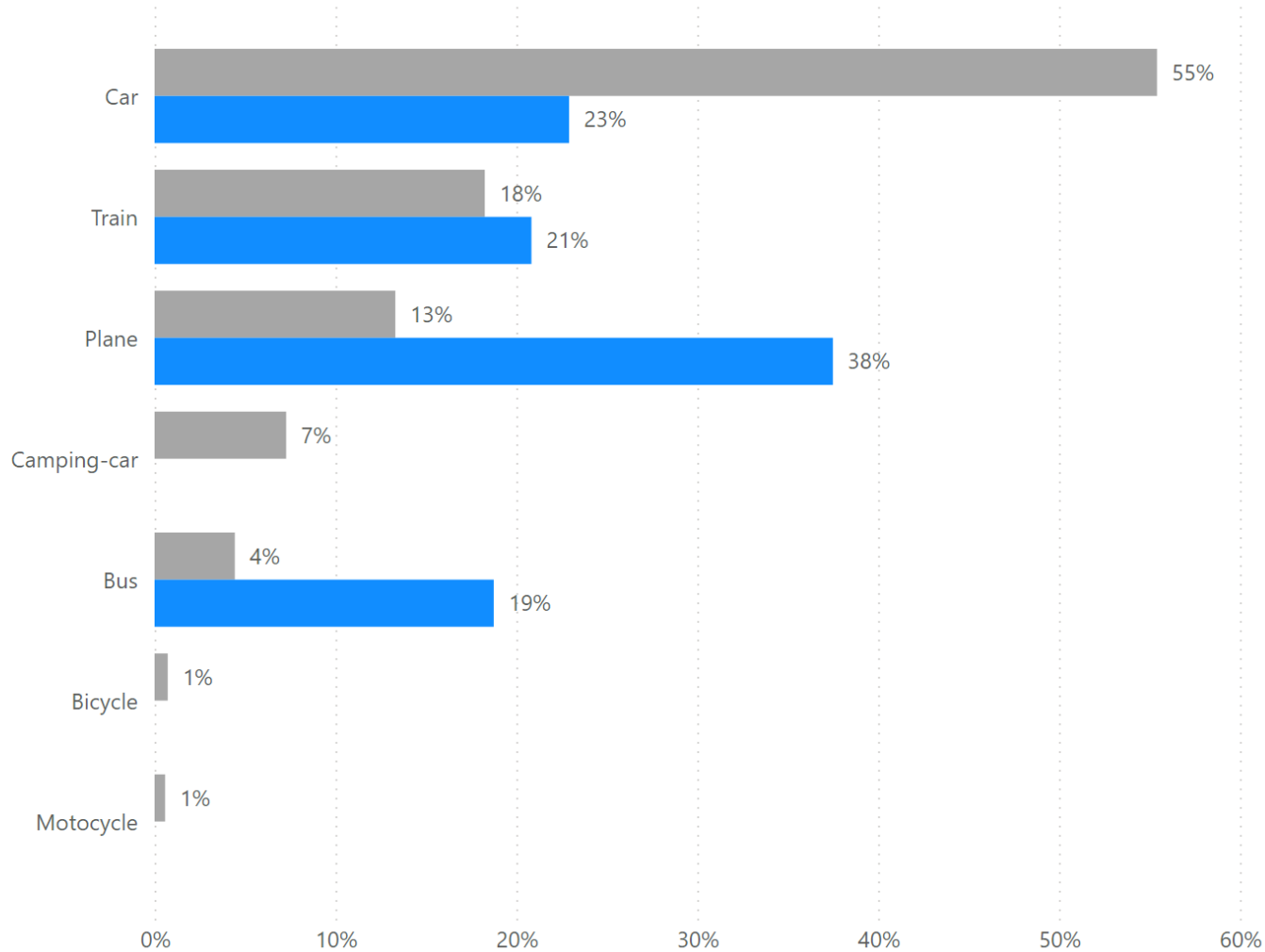
● All inbound ● Portugal



Low N for this question for segment(s): Portugal (N=48)

Transport to destination
Leisure overnight visitors, 2022–2025

● All inbound ● Portugal



Low N for this question for segment(s): Portugal (N=48)

First-time visitors
Leisure overnight visitors, 2024–2025

62%

All inbound

74%

Portugal

Visitors spending nights in
Luxembourg and abroad
during same trip

Leisure overnight visitors, 2024–2025

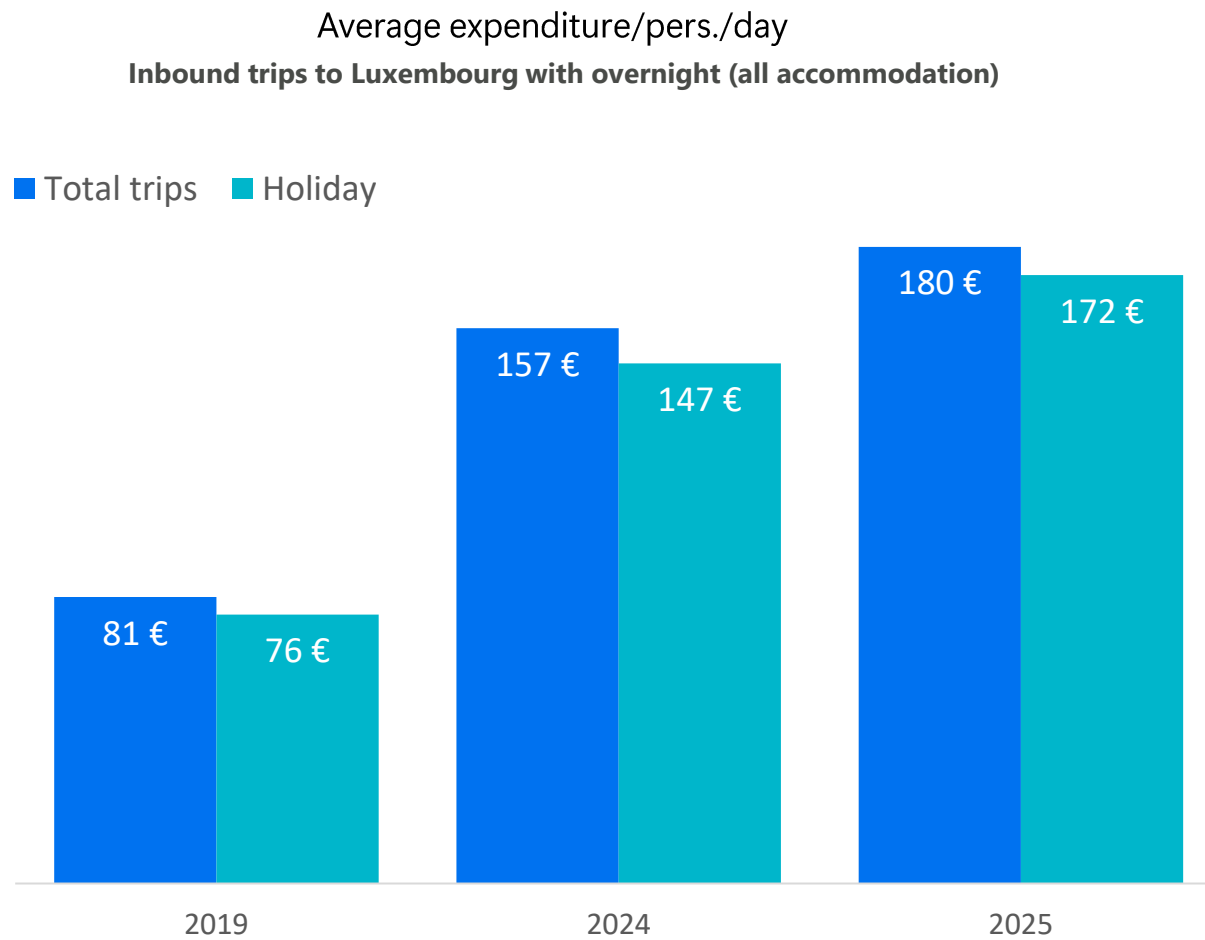
38%

All inbound

38%

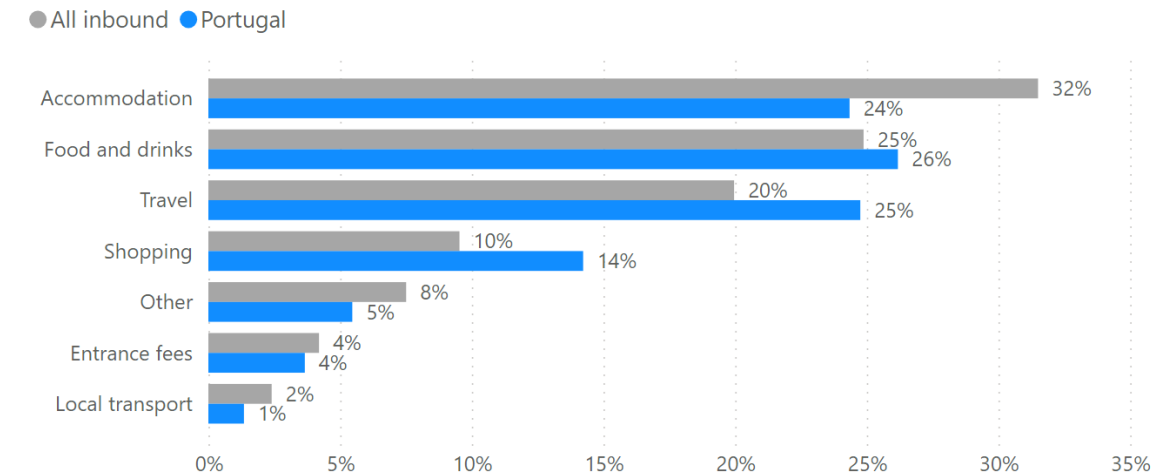
Portugal

Low N for this question for segment(s): Portugal
(N=48)



Spending categories

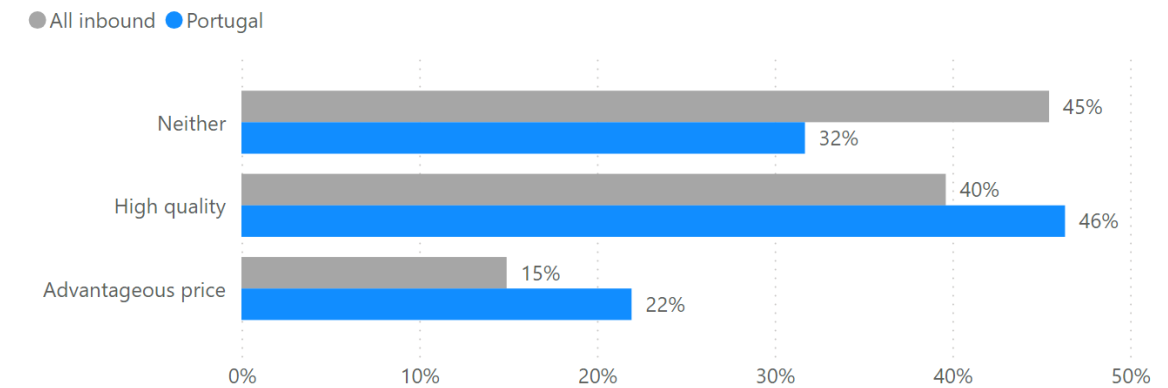
Leisure overnight visitors, 2022–2025



Low N for this question for segment(s): Portugal (N=41)

Quality vs. price orientation

Leisure overnight visitors, 2023–2025



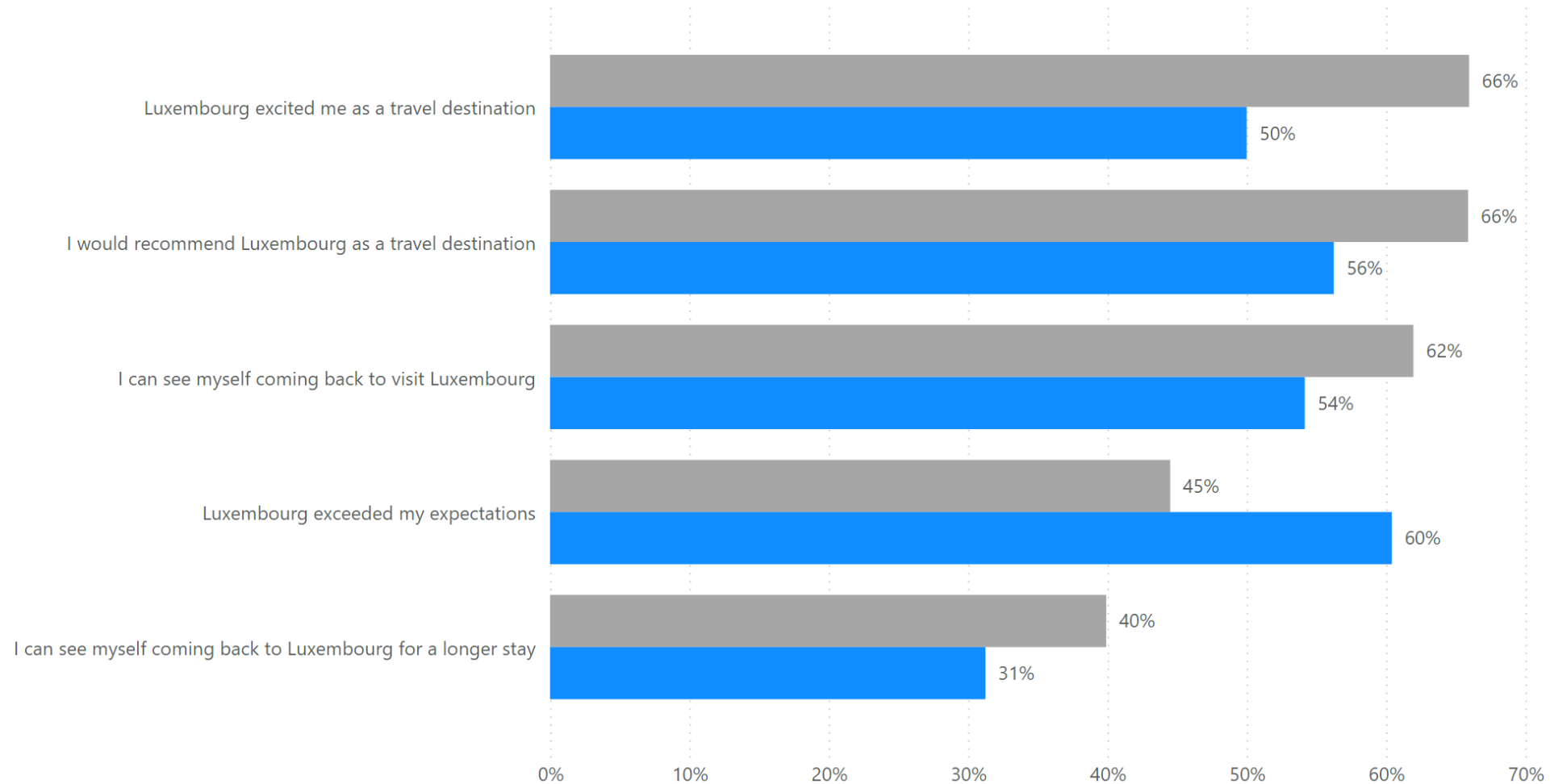
Low N for this question for segment(s): Portugal (N=41)



Overall satisfaction - % "strongly agree"

Leisure overnight visitors, 2022–2025

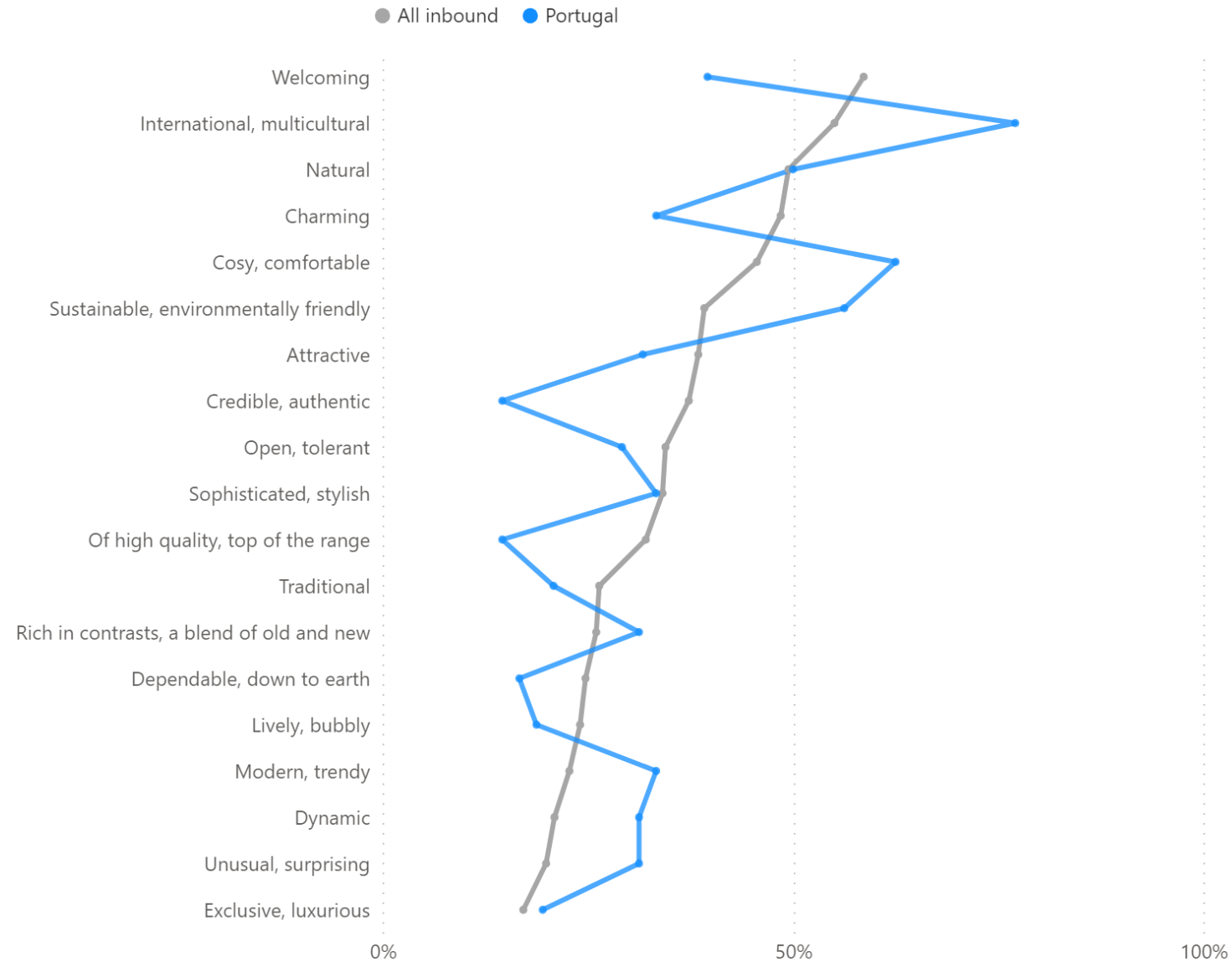
● All inbound ● Portugal



Low N for this question for segment(s): Portugal (N=48)

Brand features

Leisure overnight visitors, 2022–2025



Low N for this question for segment(s): Portugal (N=48)



Target segments, Brand & Growth Potential

LFT Target Segments



Portugal
All inbound

Explorers



Nature-Loving Actives



Relaxation Seekers



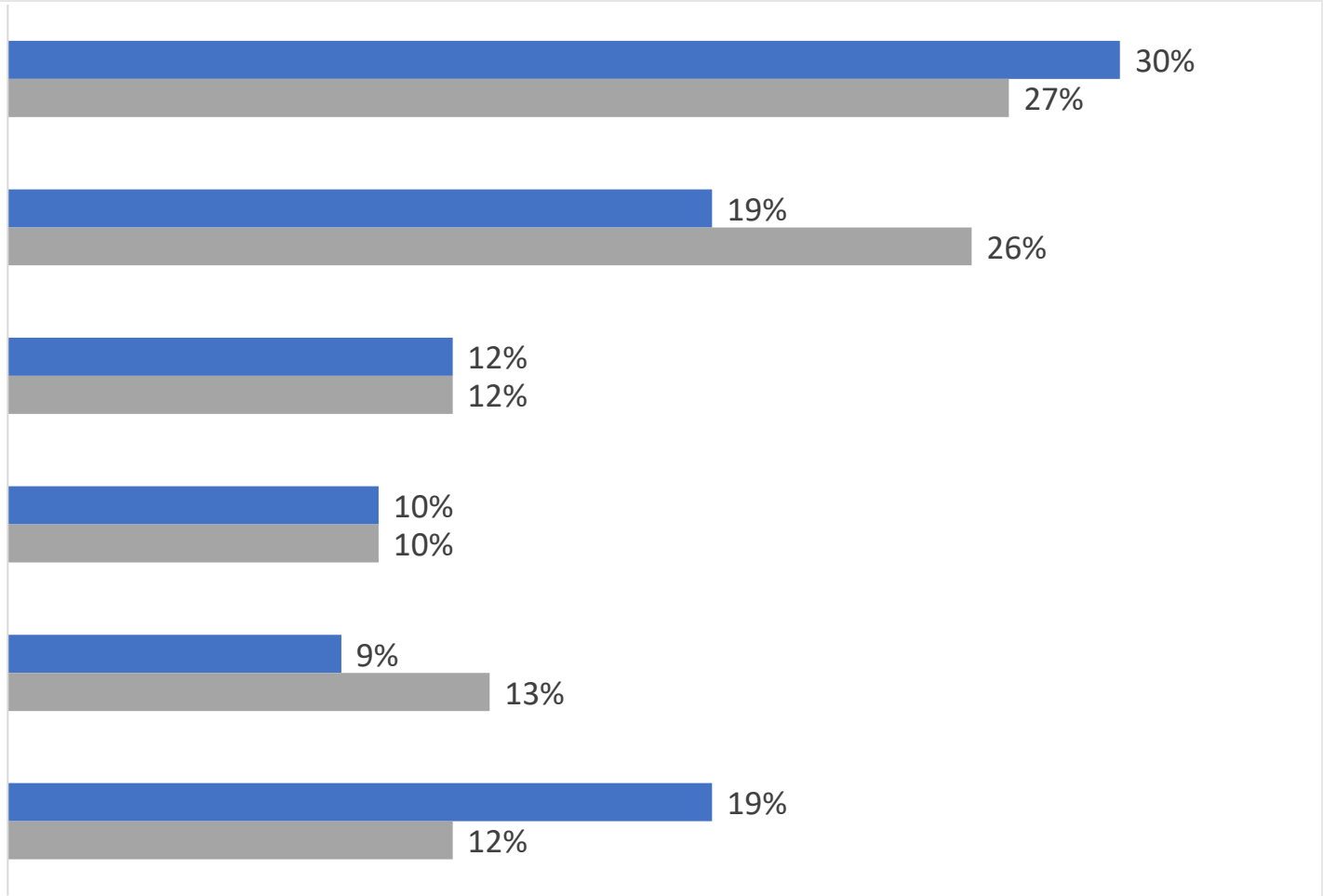
Short Breakers



Perfection Seekers

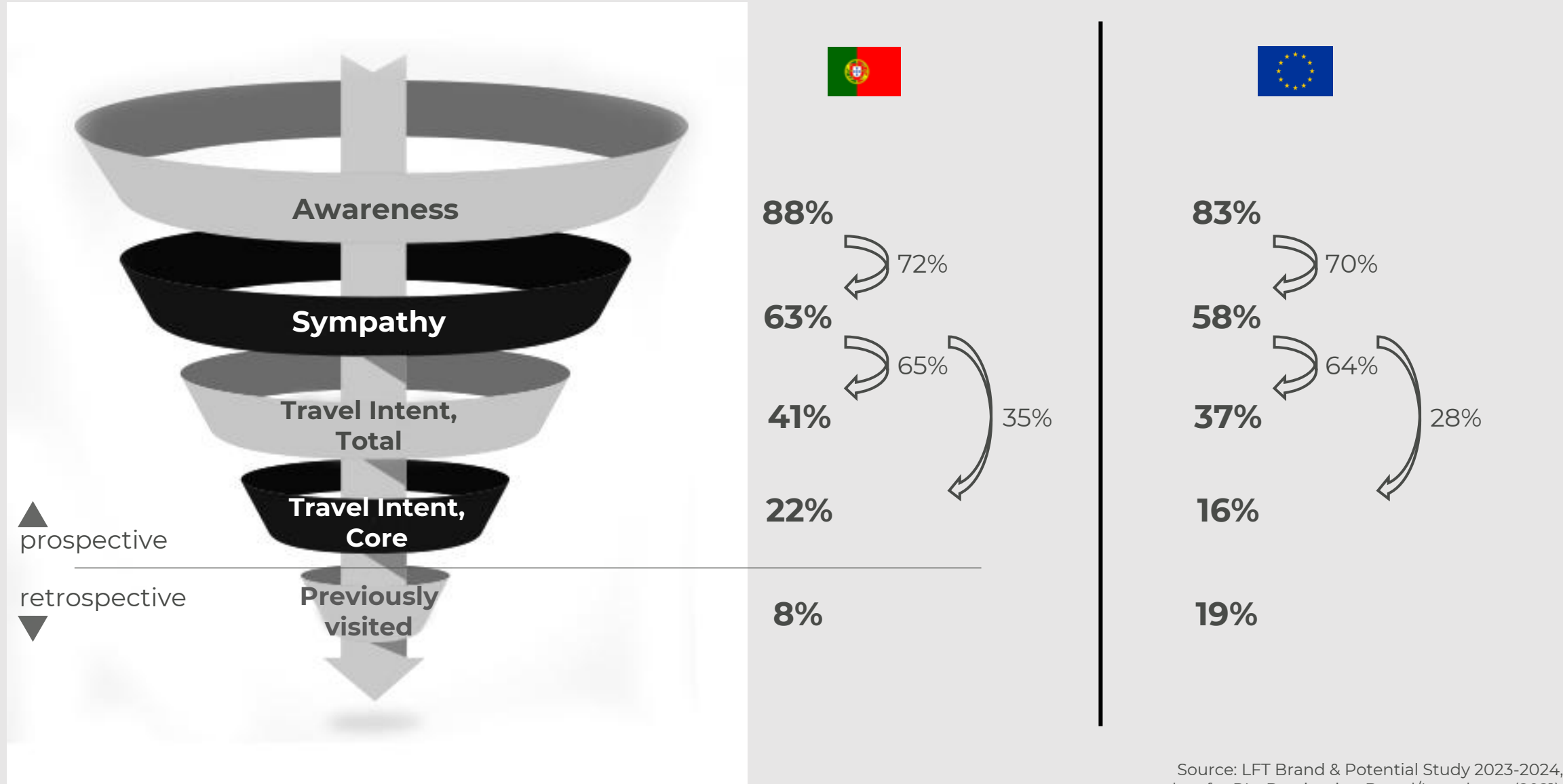


Leisure Oriented



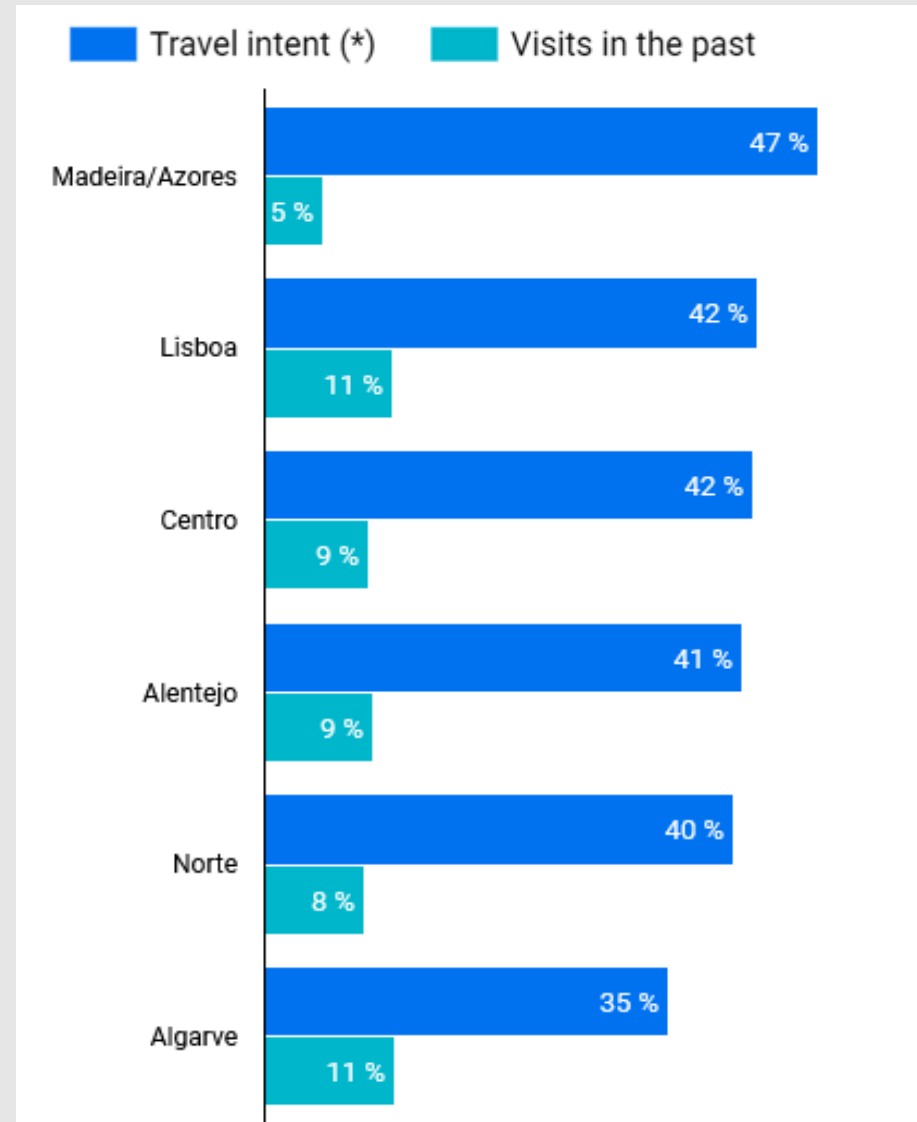
Destination Luxembourg - Brand Funnel 2024

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



Regional origin 2024

Past visitors and future potential



General theme interest (*)



Theme			
	Rank	Rank	% interested
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).

Luxembourg's Theme Competence (*)



Theme			
	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.

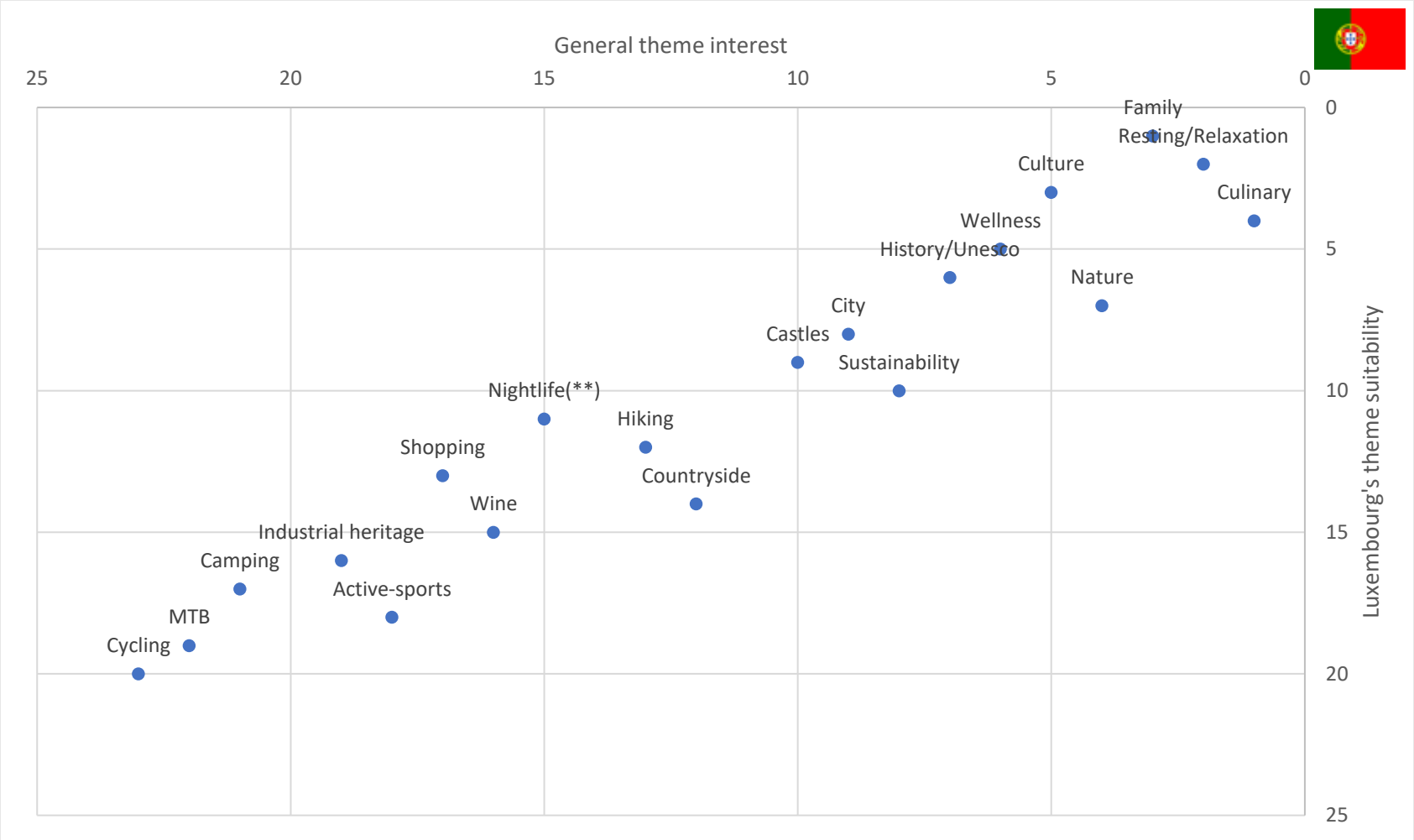
Europe : average rank for source markets DE-BE-NL-FR-UK-CH-AT-IT-ES-PL-IE-DK-SE-PT.

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

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 (*)

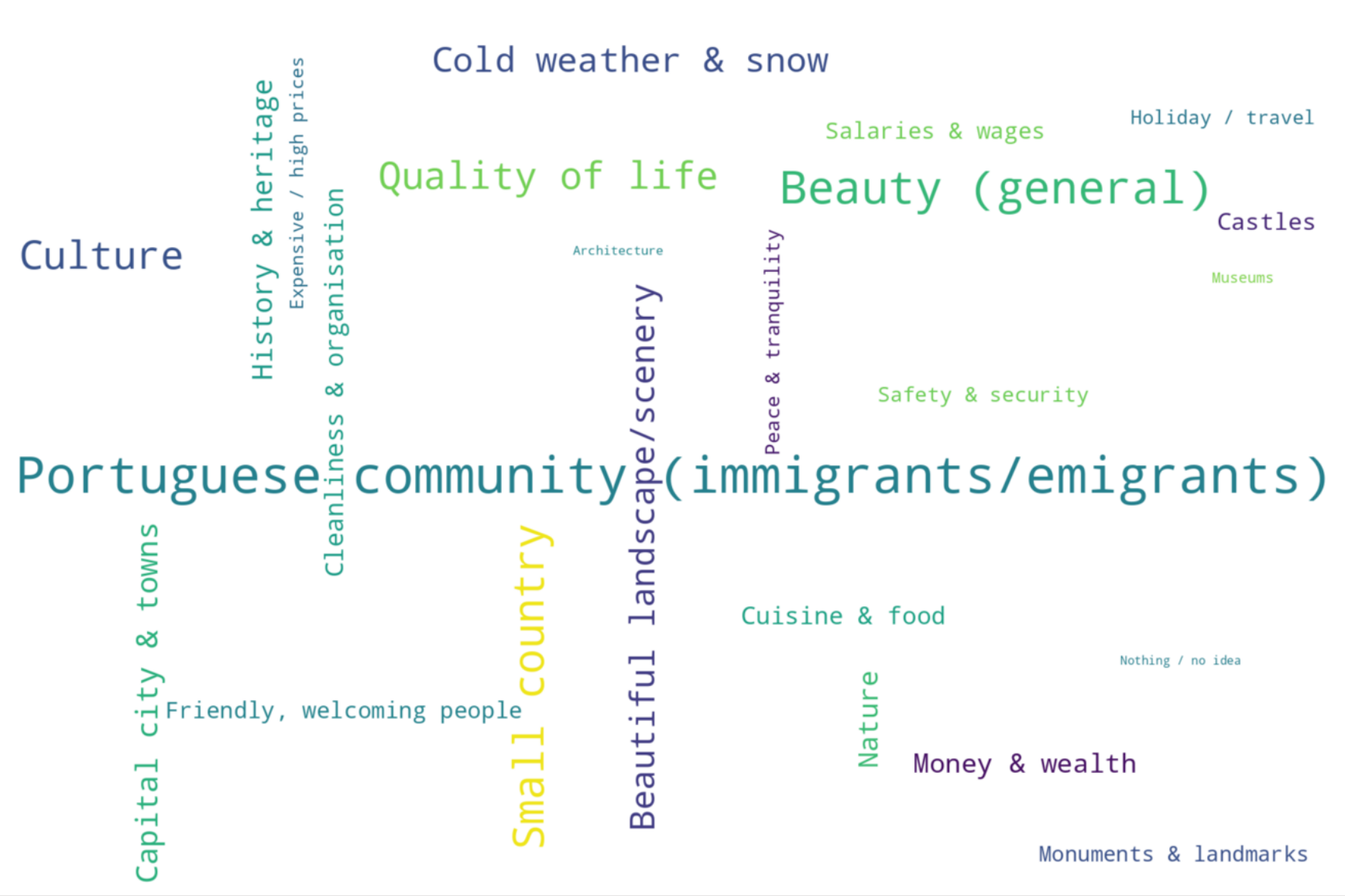


Feature			
	Rank	Rank	% agreeing
safe	1	1	68%
of high quality	2	2	60%
welcoming, hospitable	3	3	58%
open-minded, tolerant, international	5	4	55%
authentic, real	4	5	55%
dynamic, modern	8	6	51%
attractive, appealing	6	7	50%
surprising	10	8	45%
service oriented	9	9	45%
varied, diversified	11	10	42%
sustainable	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.

Spontaneous associations with Luxembourg



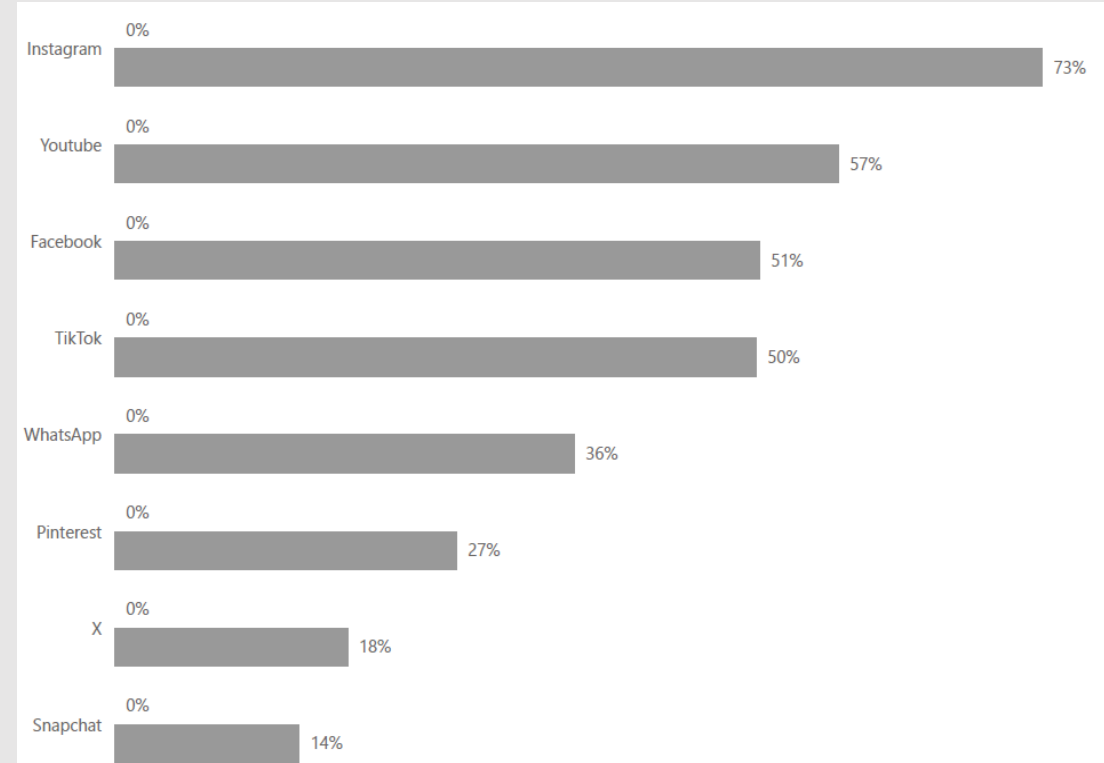
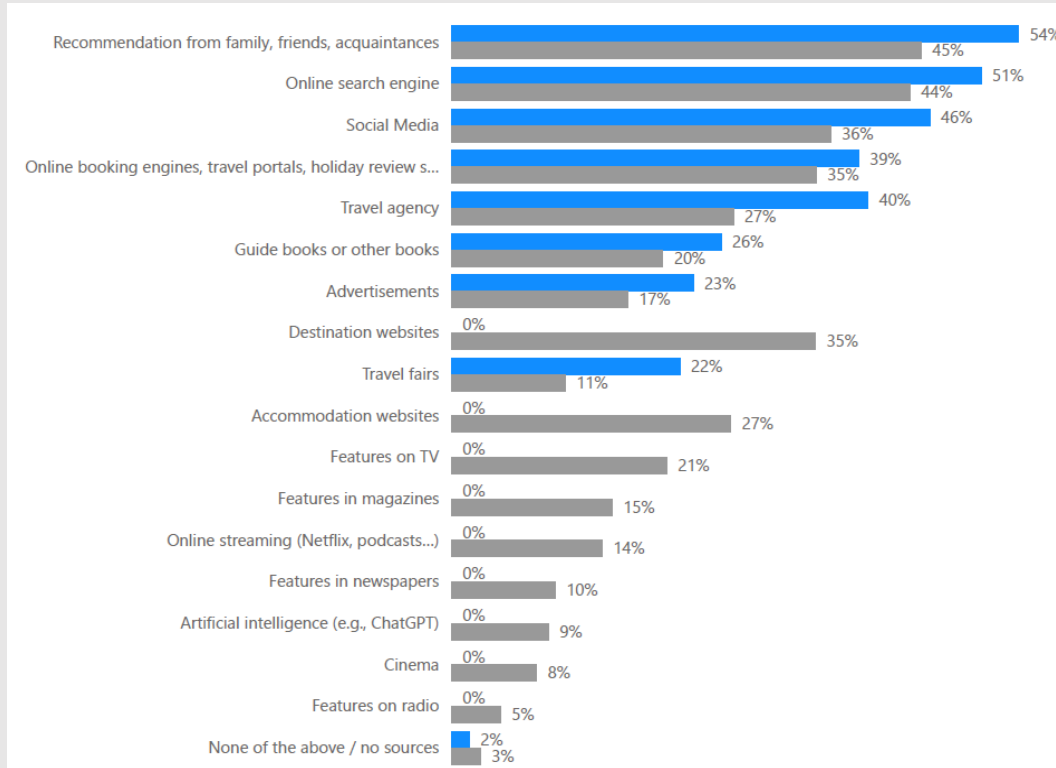
Trip organisation and preferences (1)

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

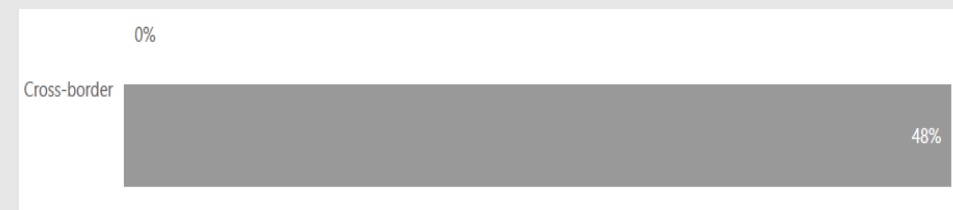


Portugal
All inbound

Preferred sources of travel inspiration



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

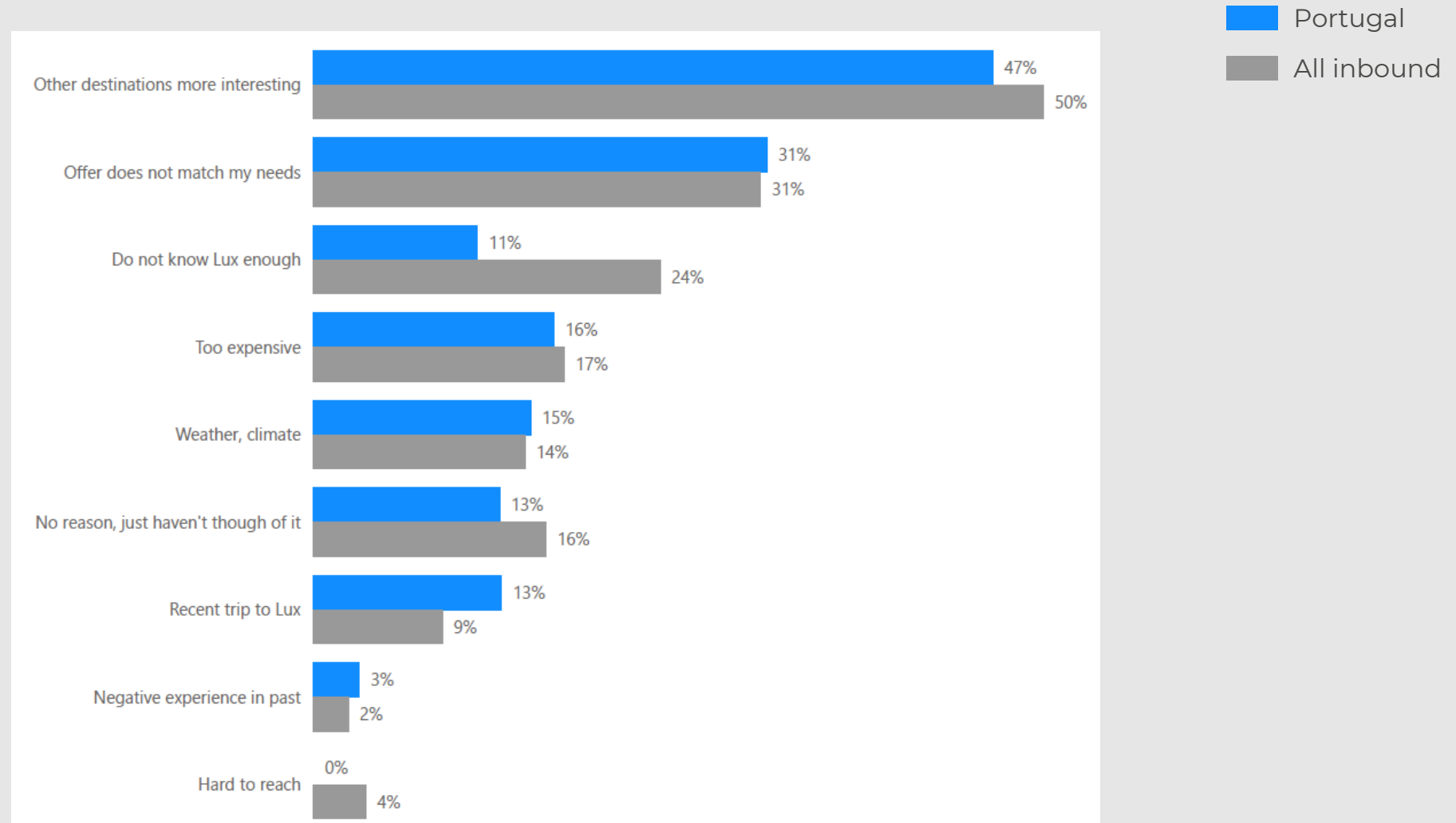


Trip organisation and preferences (2)

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



Reasons for not considering Luxembourg as a destination

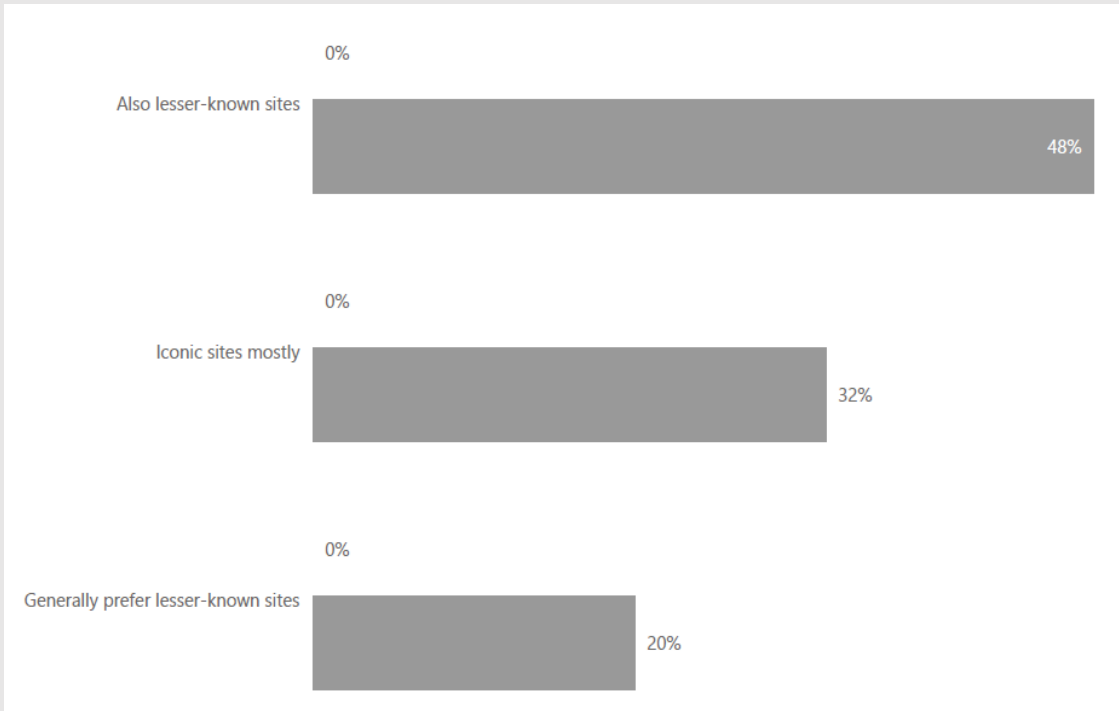


Trip organisation and preference (3)

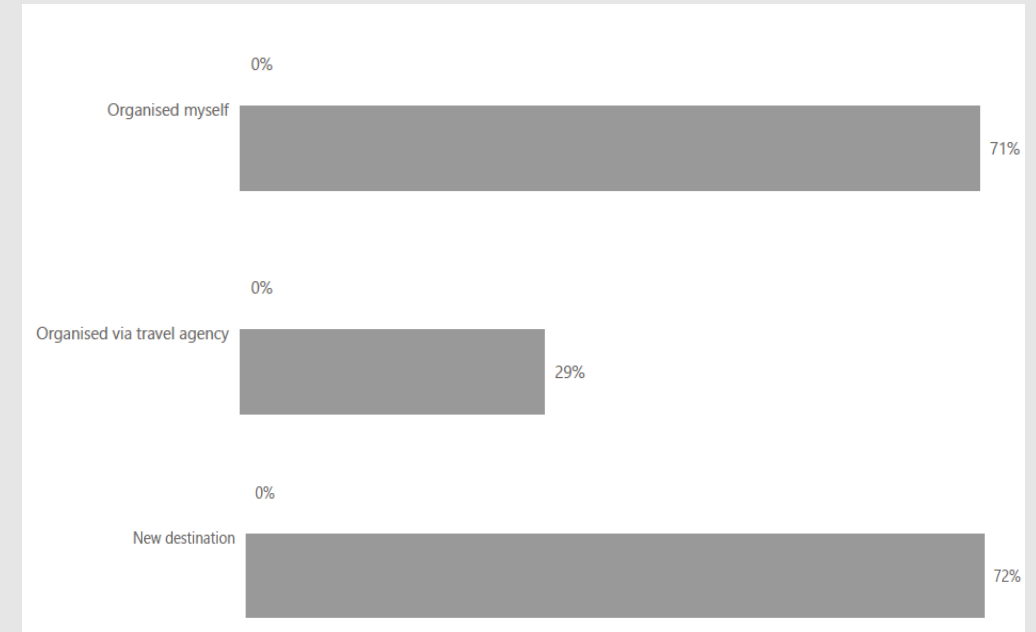
— Average **European source markets**, total vs. Portugal



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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