Luxembourg for Tourism Theme profile CITY BREAKS (as a main holiday type) 2023

Market size of City breaks segment

Volume of leisure visitors with City breaks as a main holiday type Overnight trips



Share of visitors with City Breaks as a main holiday type by source markets

Other

23%

Number of overnight trips to Luxembourg (estimate 2023)



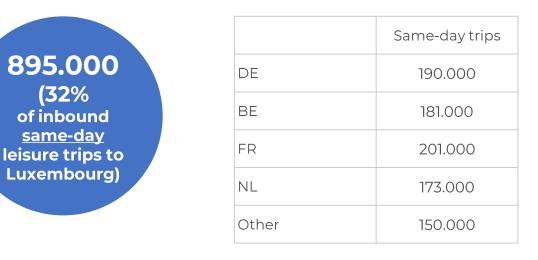
Sources: LFT/IIres Visitor Survey, 2020-2023; trip volumes are estimates based on World Travel Monitor/IPK International & Editus/LFT mobile phone data).

Volume of leisure visitors with City breaks as a main excursion type Same-day trips

Share of visitors with City Breaks as a main excursion type by source markets

All inbound 32% DE 31% BE 30% FR 30% NL 42% Other 30%

Number of trips / excursions to Luxembourg (estimate 2023)



Sources: LFT/IIres Visitor Survey, 2020-2023; trip volumes are estimates based on Editus/LFT mobile phone data).

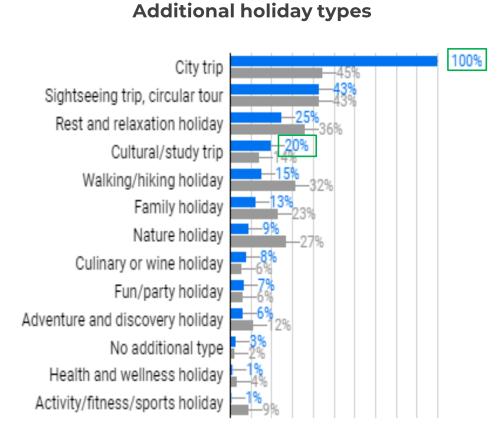
Travel behaviour of leisure visitors with City breaks as a main holiday or excursion type in Luxembourg

Holiday types Inbound leisure visitors with overnight, 2020-2023

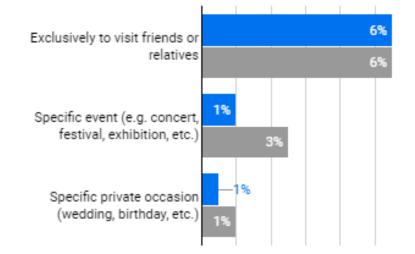
City breaks (as main holiday type)

Significantly higher than average

All visitors



Main purpose of overnight trip (if not holiday)

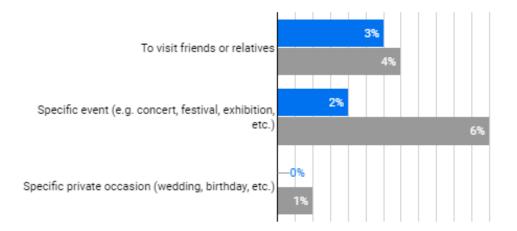


Types of excursions Inbound leisure same-day visitors, 2020-2023

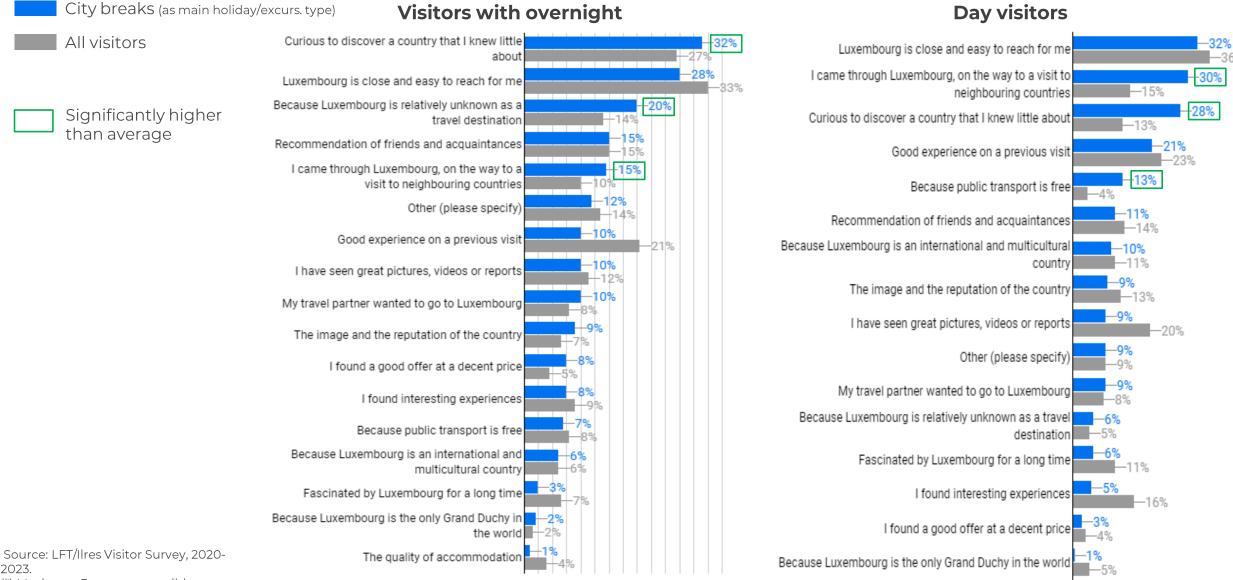
City breaks (as main excursion type)

All visitors

Main purpose of same-day trip (if not excursion)



Key decision criteria for choosing Luxembourg (*) Inbound leisure visitors, 2020-2023



(*) Maximum 3 answers possible.

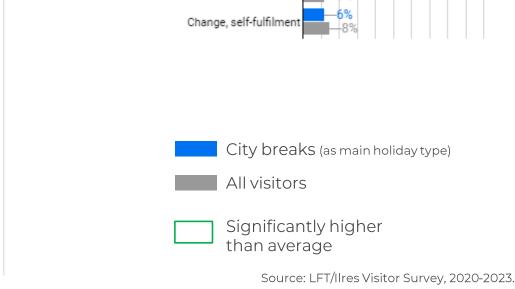
2023.

Key travel motives and emotions Inbound leisure visitors with overnight, 2020-2023

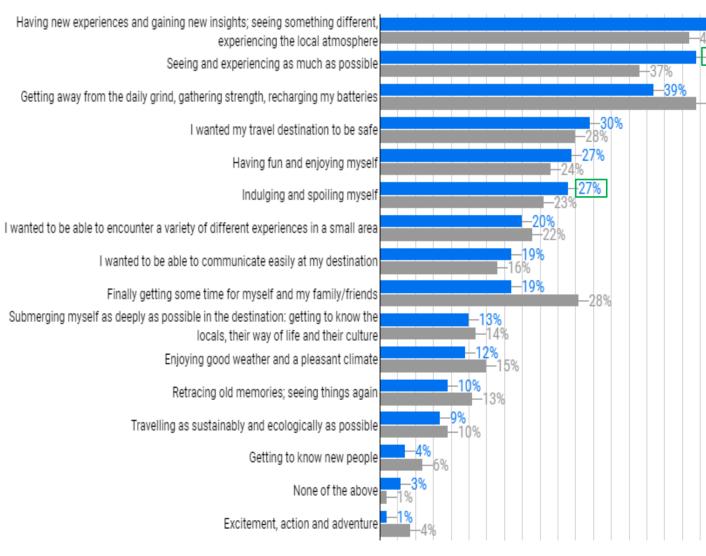
48%

Personally enriching travel experience, added meaning to my life Happiness, well-being Tried something new Recreation, relaxation, returned rested Connected with nature; consciously experienced nature A defining interpersonal experience (e.g. though encounters with locals) Mindfulness; travelled with more conscience None of the above emotions apply to me Change, self-fulfilment

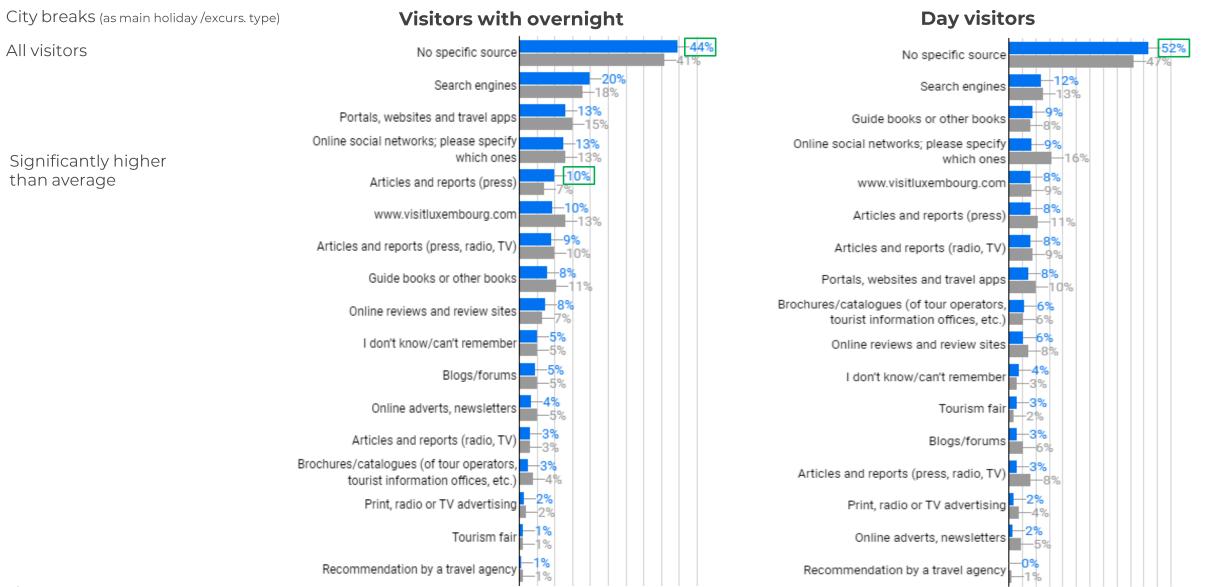
Emotions experienced during stay



Travel motives



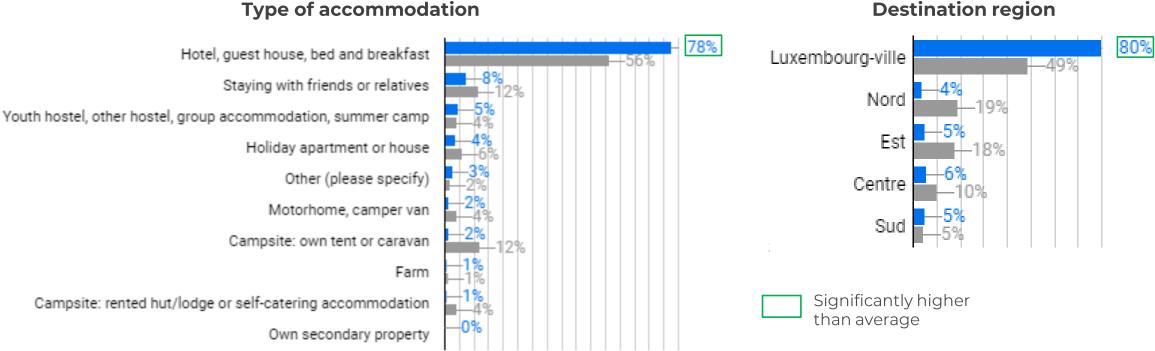
Inspiration sources Inbound leisure visitors, 2020-2023





City breaks (as main holiday type)

All visitors



Destination region

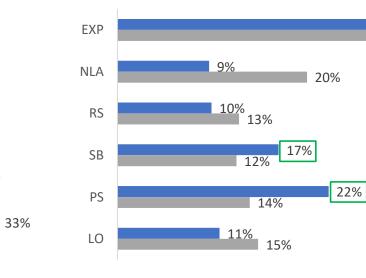
Target segments Inbound leisure visitors, 2020-2023



EXP – Explorers NLA – Nature-Loving Actives RS – Relaxation Seekers SB – Short Breakers PS – Perfection Seekers

PS – Perfection Seekers

LO – Leisure Oriented



Significantly higher

Visitors with overnight

than average

32%

27%

Day visitors



Reading example: 32% of city breakers are

Reading example: 24% of Explorers are city breakers

Reading example: 32% of city breakers ar Explorers

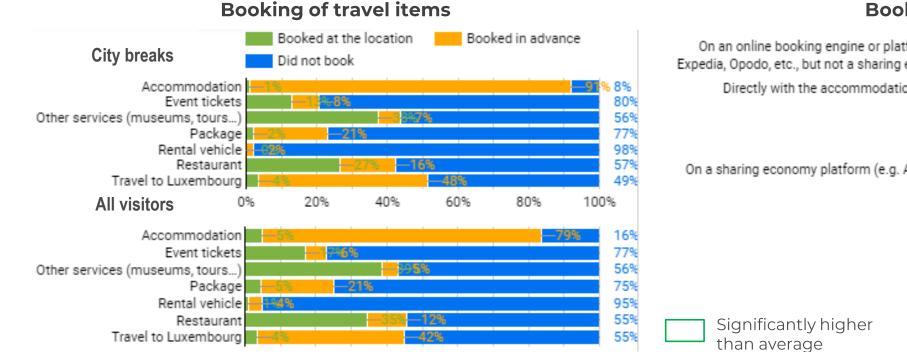
■ City breaks ■ All visitors



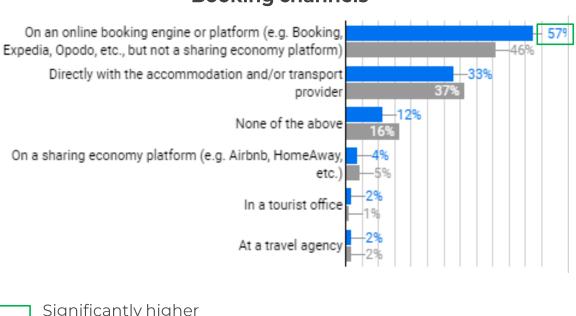
City breaks (as main holiday type)

All visitors

Booking behaviour Inbound leisure visitors with overnight, 2020-2023



Booking channels



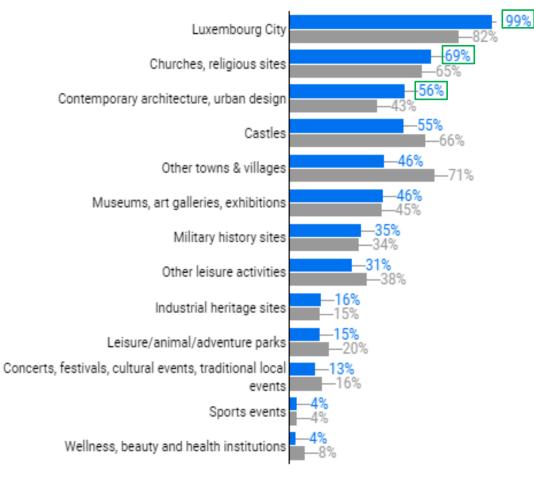
Places visited during leisure stays Inbound leisure visitors, 2020-2023

City breaks (as main holiday /excurs. type)

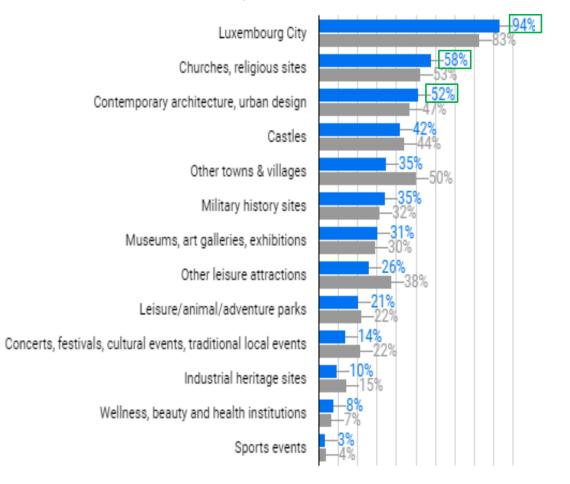
Significantly higher than average

All visitors

Visitors with overnight



Day visitors



Non-sporting activities undertaken during leisure stays Inbound leisure visitors, 2020-2023

City breaks (as main holiday /excurs. type)

e)

Significantly higher than average

All visitors

Local flair/atmosphere Trying regional specialities, typical local restaurants Observing nature Nature sites, excursions in the countryside Shopping (excl. daily goods) Urban lifestyle / street culture / street art Nightlife (e.g. pubs, bars) Buying at the market or directly from producers Fine dining, starred restaurants Wine tasting and oenological experiences Augmented reality

Visitors with overnight

Day visitors



Sporting activities undertaken during leisure stays Inbound leisure visitors, 2020-2023

Significantly higher than average

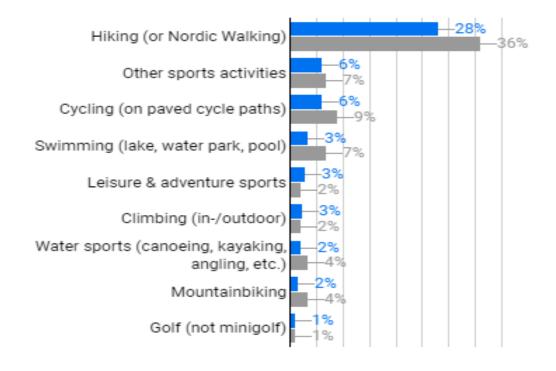
City breaks (as main holiday /excurs. type)

All visitors

Hiking (or Nordic Walking) Cycling (on paved cycle paths) Other sports activities Mountainbiking Swimming (lake, water park, pool) Leisure & adventure sports Climbing (in-/outdoor) Golf (not minigolf) Water sports (canoeing, kayaking, angling, etc.)

Visitors with overnight

Day visitors

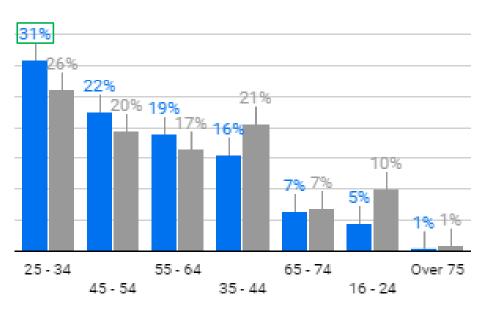


Age groups Inbound leisure visitors, 2020-2023



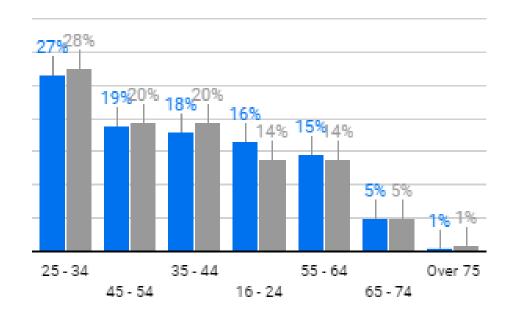
City breaks (as main holiday /excurs. type)

All visitors



Significantly higher than average





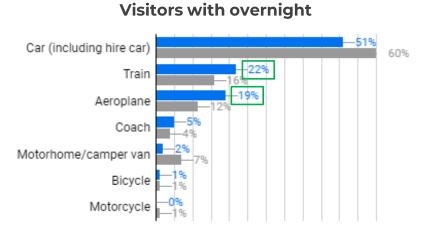
Day visitors

Transport (to and in destination) Inbound leisure visitors, 2020-2023

City breaks (as main holiday /excurs. type)

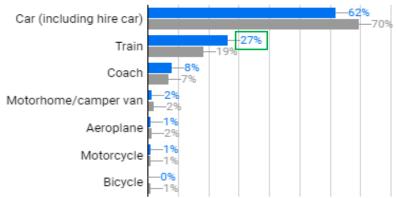
Significantly higher than average

All visitors



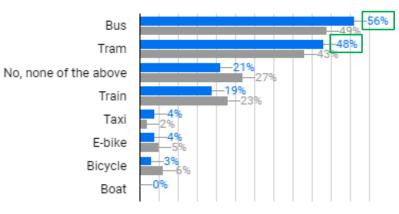
Transport to destination

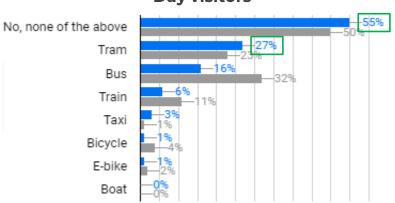
Day visitors



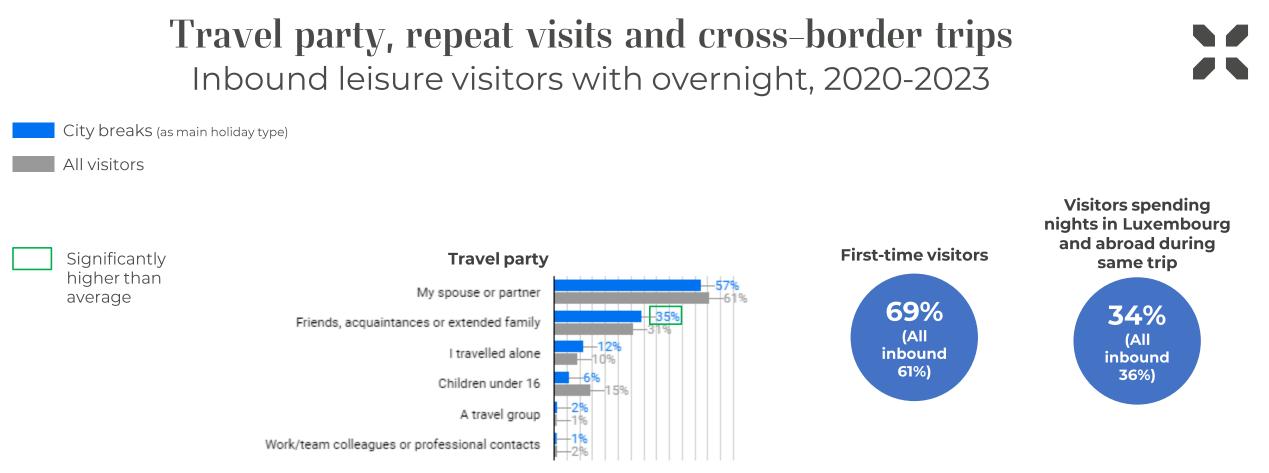
Transport in destination

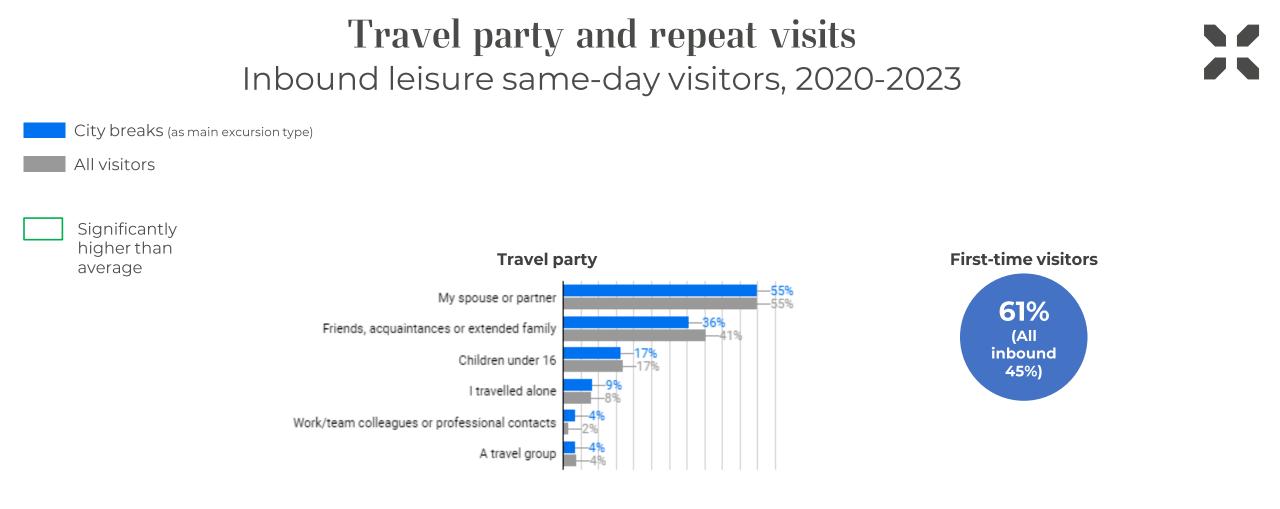
Visitors with overnight





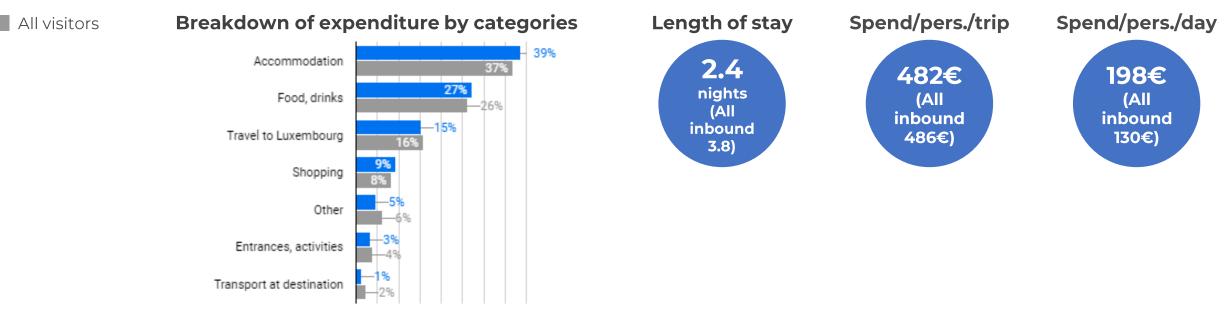
Day visitors



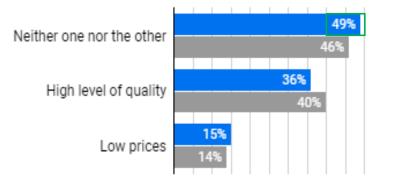


Expenditure, length of stay and quality vs price orientation Inbound leisure visitors with overnight, 2020-2023

City breaks (as main holiday type)



Quality vs. price orientation



Significantly higher than average

Expenditure Inbound leisure same-day visitors, 2020-2023

City breaks (as main excursion type)

All visitors

32% Food, drinks 34% Travel to 25% Luxembourg 27% 22% Shopping 179 12% Other 13% Entrances, activities Transport at % destination 3% Significantly higher than average

Breakdown of expenditure by categories

Spend/pers./day trip



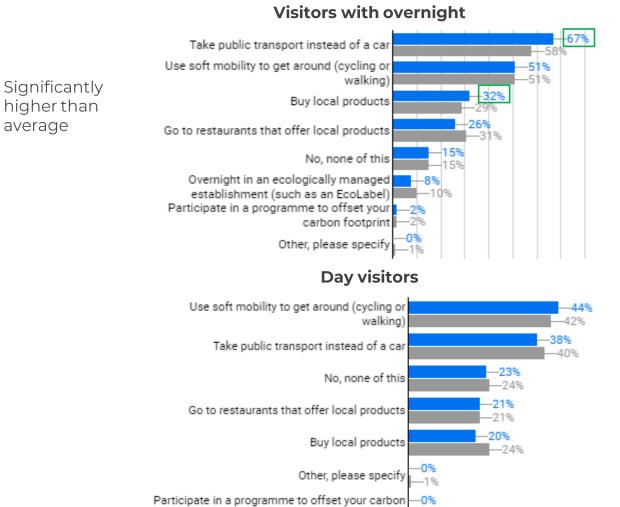
Actions during stay (sustainable and services) Inbound leisure visitors, 2020-2023

City breaks (as main holiday /excurs. type)

All visitors

average

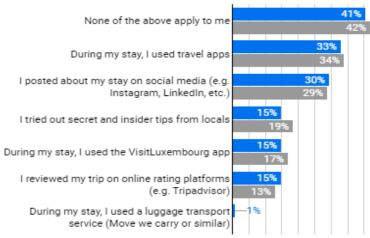
Sustainable actions during stay



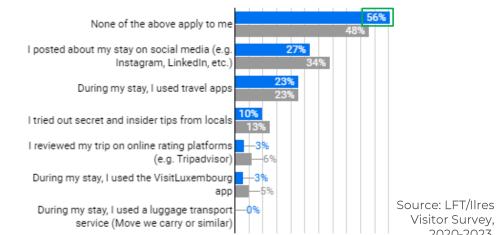
footprint -0%

Services used during stay

Visitors with overnight



Day visitors

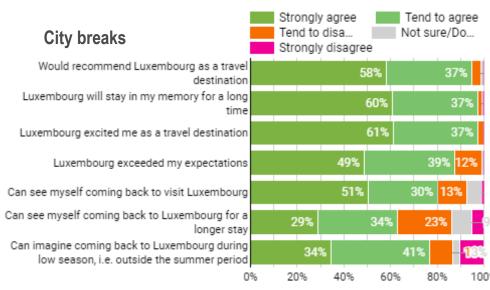


Visitor Survey,

2020-2023.

Visitor satisfaction and recommendation Inbound leisure visitors, 2020-2023

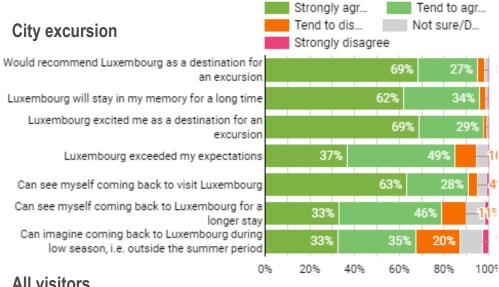
Visitors with overnight



All visitors

Would recommend Luxembourg as a travel destination		65%	32%
Luxembourg will stay in my memory for a long time		65%	34%
Luxembourg excited me as a travel destination		66%	32%
Luxembourg exceeded my expectations	44%		46%
Can see myself coming back to visit Luxembourg		63%	27%
Can see myself coming back to Luxembourg for a longer stay	42%	29%	19%
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period	47%	3	8% 10

Day visitors



All visitors

destination for 70%	Would recommend Luxembourg as a destination for an excursion
or a long time 64%	Luxembourg will stay in my memory for a long time
tination for an 71%	Luxembourg excited me as a destination for an excursion
vexpectations 37% 52	Luxembourg exceeded my expectations
t Luxembourg 71%	Can see myself coming back to visit Luxembourg
embourg for a 43% 36%	Can see myself coming back to Luxembourg for a longer stay
5/3 33	Can imagine coming back to Luxembourg during low season, i.e. outside the summer period

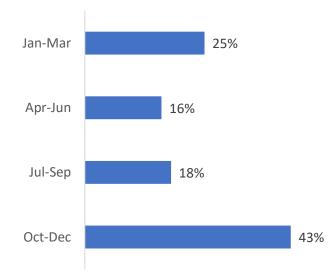
26%

33%

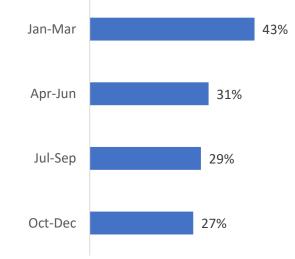
27%

Trip seasonality Inbound leisure visitors, 2020-2023





Day visitors



~

Destination Awareness & Growth Potential for City Trips segment

General theme interest - City Trips

	Rank (*)	Total themes in survey	% "very interested"	% "interested"	% "interested", Ø all themes	"Interested", population, mn (**)
Average Europe	5	33	-	68%	54%	-
	7	33	39%	64%	52%	38,4
	6	33	36%	62 %	53%	7,9
•	6	33	38%	66%	54%	4,4
	6	33	42%	67 %	53%	4,4
	9	33	31%	62 %	51%	5,1
	15	33	30%	60%	55%	28,3
	7	33	38%	67 %	53%	32,4
	1	20	49%	80%	40%	34,1
- 1 1	1	20	41%	79 %	44%	27,3
	2	21	39%	71 %	47%	19,9
	3	24	45%	70 %	54%	2,5
	5	24	35%	65%	51%	2,7
	4	24	28%	64%	52%	4,6
œ	9	24	37%	71 %	60%	5,3

(*) Rank among all surveyed themes in respective source market. Based on % "interested" in theme. (**) Aged 18-74.

Sources: LFT Brand & Potential Studies, except IT-ES-PL: Destination Brand/Inspektour.

Luxembourg's perceived theme competence – City Trips

	Rank (*)	Total themes in survey	% "very suitable"	% "very suitable", Ø all themes	"very suitable", population, mn (**)
Average Europe	1	26	37 %	24%	-
	1	26	42 %	23%	25,2
	9	26	29 %	26%	3,7
	1	26	40 %	22%	2,7
	2	26	41 %	23%	2,7
	7	26	29 %	25%	2,4
	1	26	35%	22%	16,2
	2	26	38%	22%	18,3
	1	15	34%	21%	14,5
	2	15	35%	25%	12,1
	1	10	42 %	27%	11,8
	1	20	48 %	27%	1,7
	1	20	37%	24%	1,6
	2	20	31%	21%	2,2
۲	8	20	38%	33%	2,9

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

(*) Rank among all surveyed themes in respective source market. Based on % "suitable" for theme. (**) Aged 18-74.

n.b. : Further information on theme interest and Luxembourg's theme competence, e.g. for past visitors and new potential visitors can be found in LFT's Brand & Potential Study report.

Sources: LFT Brand & Potential Studies, except IT-ES-PL: Destination Brand/Inspektour.

General theme interest vs. Luxembourg's theme competence

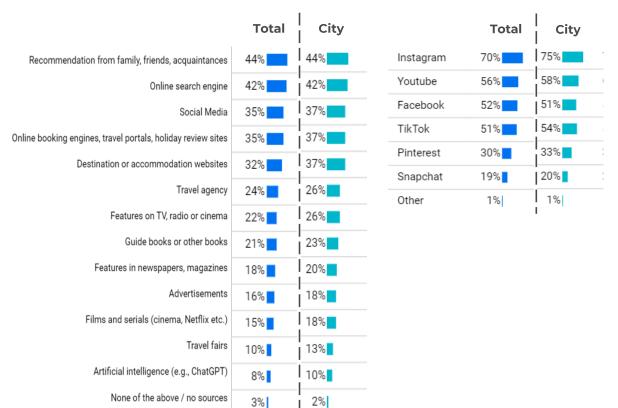
- City Trips (Ø DE-NL-CH-AT-BE-FR-UK)

LFT target segments

	"Interested", Rank	Total themes in survey	"Very suitable", Rank	Total themes in survey
EXP	4	26	1	26
NLA	11	26	2	26
RS	6	26	2	26
SB	5	26	1	26
PS	6	26	2	26
LO	6	26	1	26

Trip organisation and preferences (1) (*)

- Average European source markets, total vs. travellers interested in city breaks

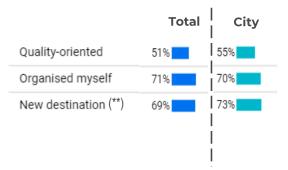


Preferred sources of travel inspiration

Travel party

	Total	 City
With my partner, spouse	38%	37%
With my family	35%	35%
With friends	15%	15%
By myself	10%	10%
With an organised group	2%	2%

Quality orientation, self-organisation, new destination

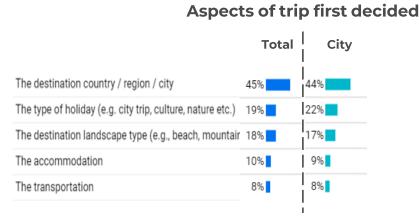


(*) During last outbound holiday trip . (**) Travelled to a destination never visited before.

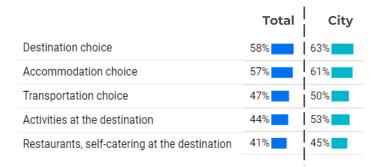
Source: LFT Brand & Potential Studies.

Trip organisation and preferences (2) (*)

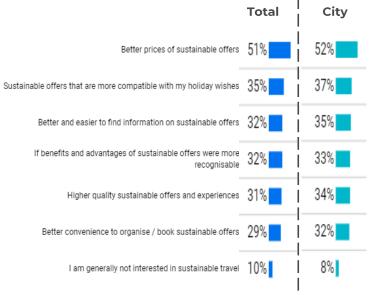
- Average European source markets, total vs. travellers interested in city breaks



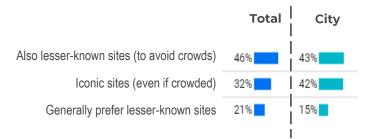
Importance of sustainability for choice of trip components



Aspects that could convince travellers to pay more attention to sustainability at future travellings



General preference for visiting iconic vs. lesser-known sites



Source: LFT Brand & Potential Studies.

(*) During last outbound holiday trip.

~

Your contact



Alain Krier Head of Insights & Strategy T. +352 42 82 82 36 <u>alain.krier@LfT.lu</u>

VISIT LUXEMBOURG

Luxembourg for Tourism GIE

6, rue Antoine de Saint-Exupéry L-1432 Luxembourg-Kirchberg <u>www.visitluxembourg.com</u>