\mathbf{X}

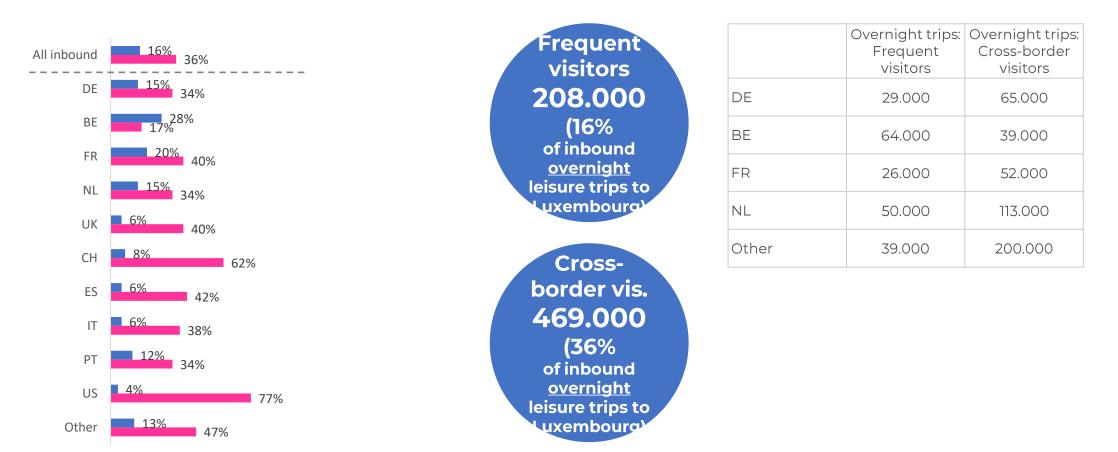
Luxembourg for Tourism Theme profile FREQUENT & CROSS-BORDER TRAVEL

2023

Market size of Frequent and Cross-border leisure visitors

Volume of frequent leisure visitors (>5 past visits) & leisure visitors with cross-border destination(s) on trip to Luxembourg Overnight trips

Share of frequent and cross-border leisure visitors, by source markets Number of overnight trips to Luxembourg (estimate 2023)



■ Frequent guests ■ Cross-border visitors

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 frequent leisure visitors (>5 past visits) to Luxembourg Same-day trips

Frequ

1.035.

visit

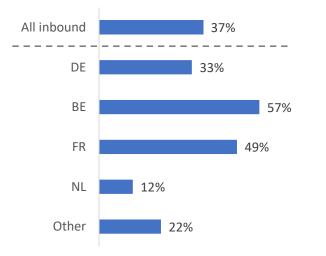
(37

of inbo

leisure t Luxemb

2

Share of frequent leisure visitors, by source markets



Number of trips / excursions to Luxembourg (estimate 2023)

uent		Same-day trips: Frequent visitors
ors .000	DE	202.000
1%	BE	344.000
ound -day	FR	328.000
rips to bourg)	NL	49.000
	Other	110.000

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

Travel behaviour of Frequent and Crossborder leisure visitors in Luxembourg

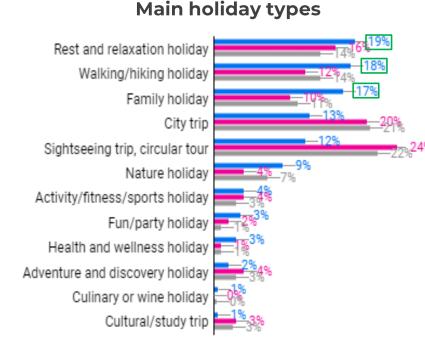
Holiday types Inbound leisure visitors with overnight, 2020-2023

Frequent guests (>5 past visits)

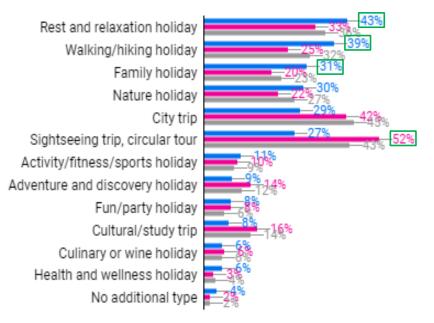
Significantly higher than average

Cross-border destination on same trip

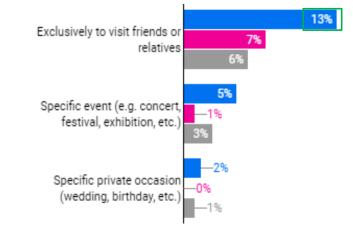
All visitors



Additional holiday types



Main purpose of overnight trip (if not holiday)

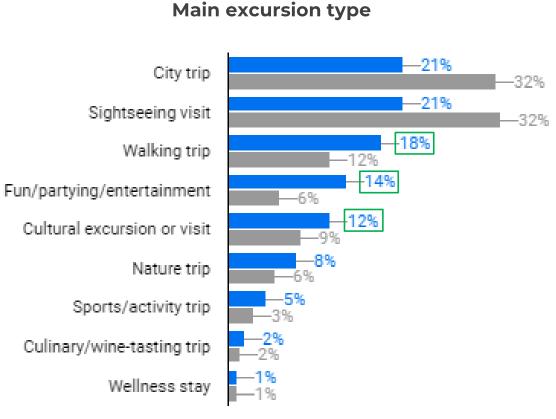


Types of excursions Inbound leisure same-day visitors, 2020-2023

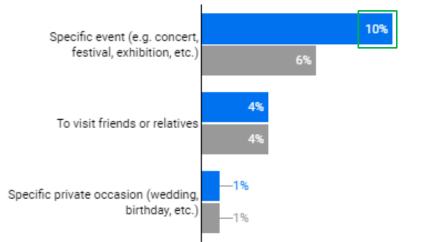
Frequent guests (>5 past visits)

Significantly higher than average

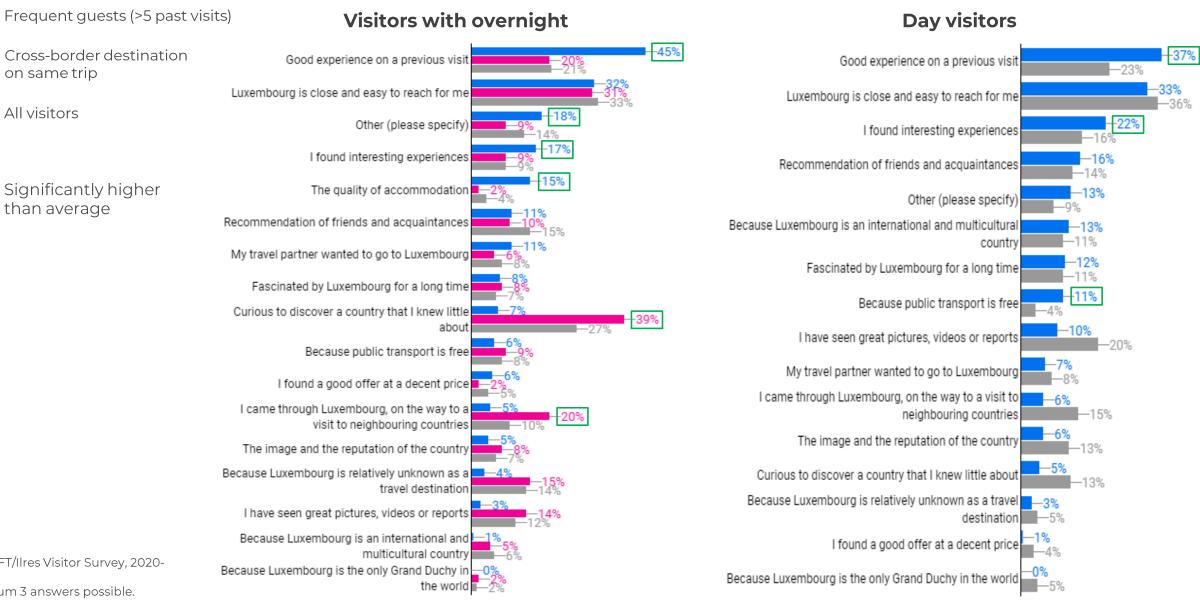
All visitors



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



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



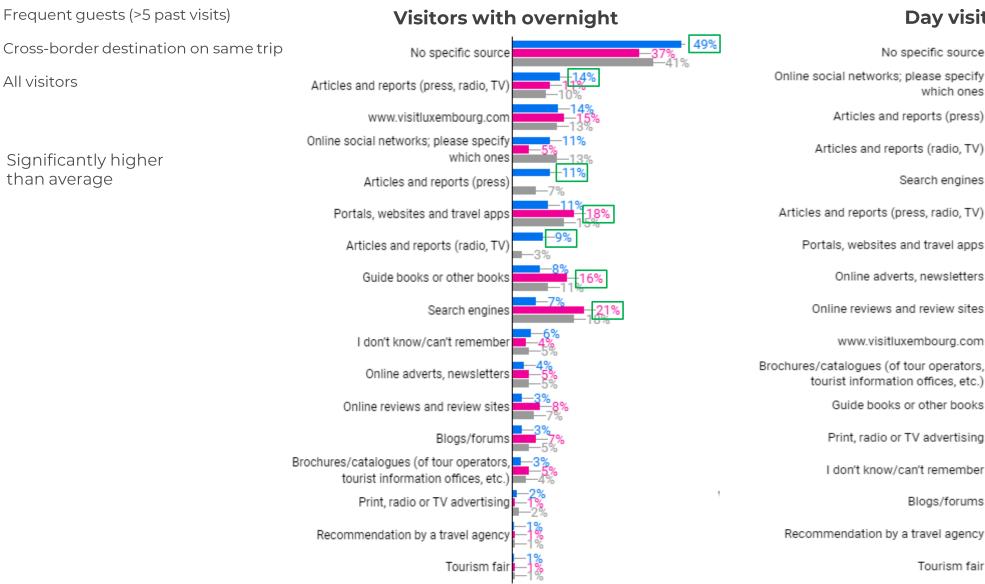
Source: LFT/Ilres Visitor Survey, 2020-2023. (*) Maximum 3 answers possible.

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

Travel motives Connected with nature: consciously experienced 54% Getting away from the daily grind, gathering strength, recharging my batteries nature Recreation, relaxation, returned rested Finally getting some time for myself and my family/friends Happiness, well-being Retracing old memories; seeing things again Personally enriching travel experience, added Seeing and experiencing as much as possible meaning to my life Tried something new I wanted my travel destination to be safe Mindfulness; travelled with more conscience Indulging and spoiling myself A defining interpersonal experience (e.g. though Having fun and enjoying myself encounters with locals' Having new experiences and gaining new insights; seeing something different, None of the above emotions apply to me experiencing the local atmosphere Change, self-fulfilmer wanted to be able to encounter a variety of different experiences in a small area I wanted to be able to communicate easily at my destination Enjoying good weather and a pleasant climate Frequent guests (>5 past visits) Submerging myself as deeply as possible in the destination: getting to know the locals, their way of life and their culture Cross-border destination on same trip Travelling as sustainably and ecologically as possible All visitors Excitement, action and adventure Significantly higher Getting to know new people than average None of the abo Source: LFT/Ilres Visitor Survey, 2020-2023.

Emotions experienced during stay

Inspiration sources Inbound leisure visitors, 2020-2023



Day visitors

which ones

48%

19%

-13%

-10%

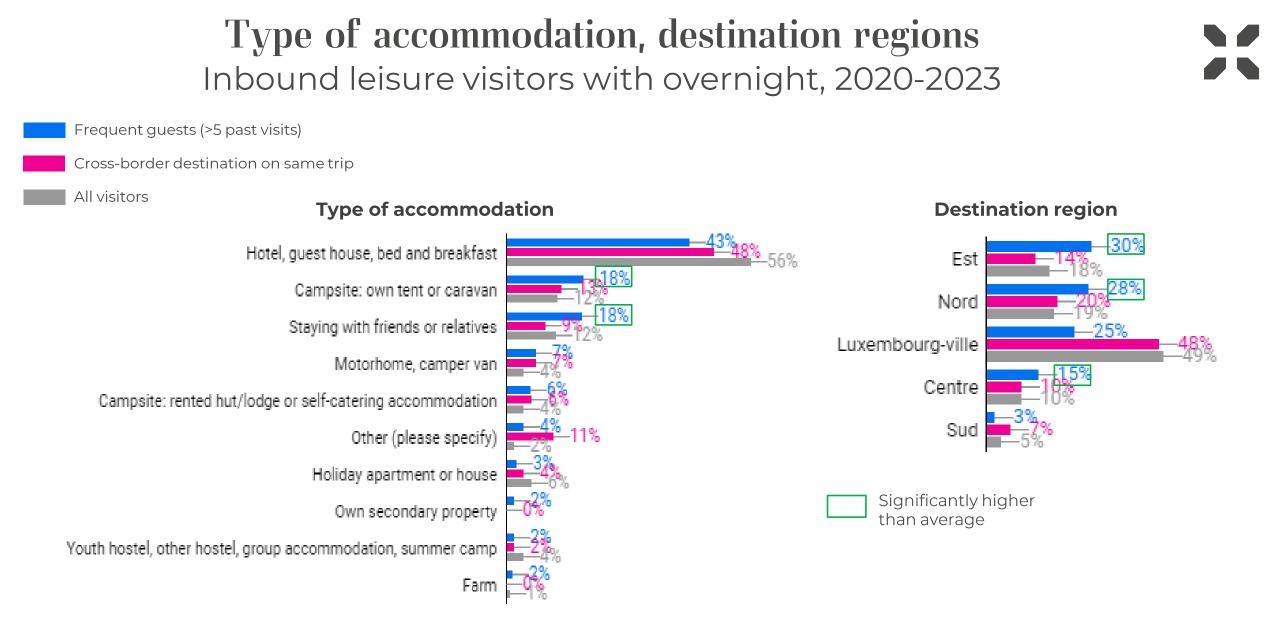
-6%

-4%

-1%

Tourism fa

Source: LFT/Ilres Visitor Survey, 2020-2023.



Target segments Inbound leisure visitors, 2020-2023



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

LO – Leisure Oriented

EXP

NLA

RS

SB

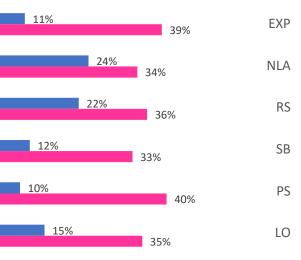
PS

LO

Visitors with overnight

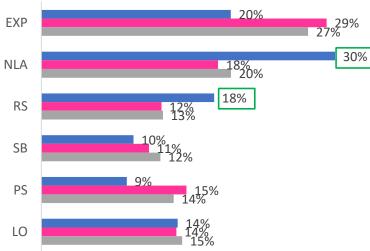
than average

Significantly higher



Cross-border visitors Frequent guests

Reading example: 11% of Explorers are frequent visitors





Reading example: 20% of frequent visitors are Explorers







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

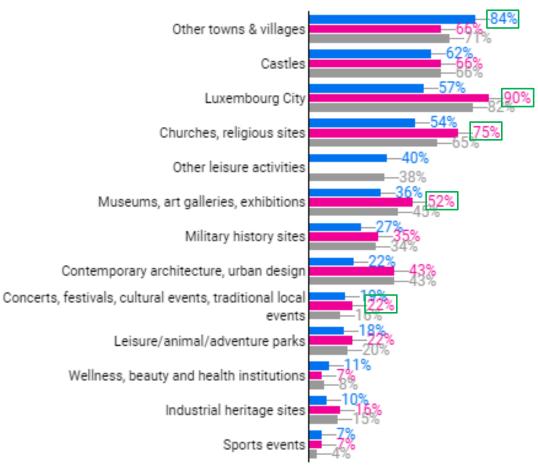
Frequent guests (>5 past visits)

All visitors

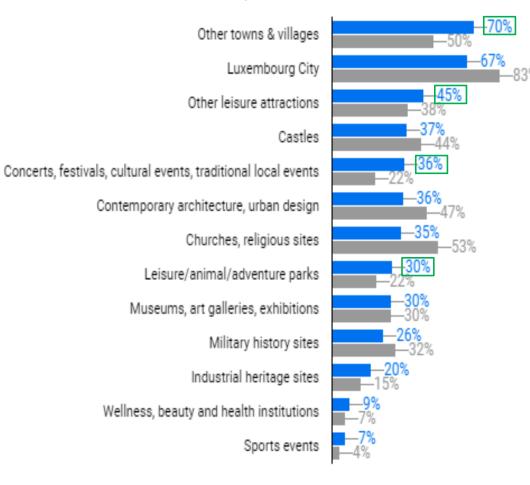
Significantly higher than average

Cross-border destination on same trip

Visitors with overnight



Day visitors



Source: LFT/IIres Visitor Survey, 2020-2023.

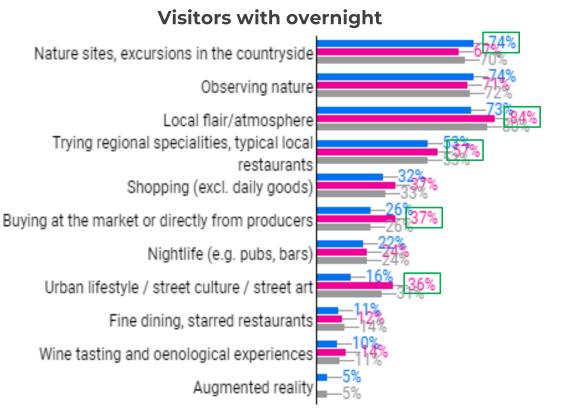
Non-sporting activities undertaken during leisure stays Inbound leisure visitors, 2020-2023

Frequent guests (>5 past visits)

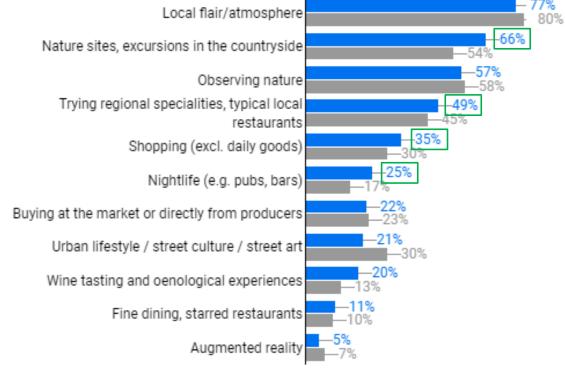
Significantly higher than average

Cross-border destination on same trip

All visitors



Day visitors



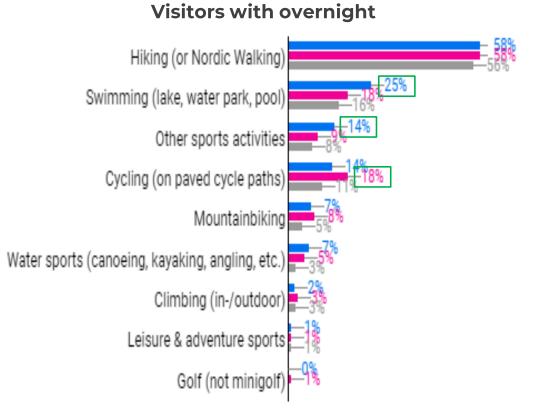
Sporting activities undertaken during leisure stays Inbound leisure visitors, 2020-2023

Frequent guests (>5 past visits)

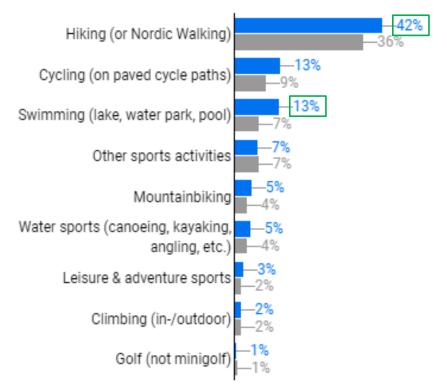
Significantly higher than average

Cross-border destination on same trip

All visitors





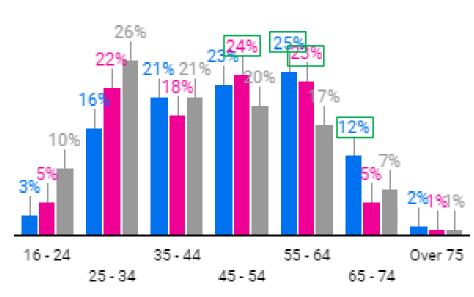


Age groups Inbound leisure visitors, 2020-2023

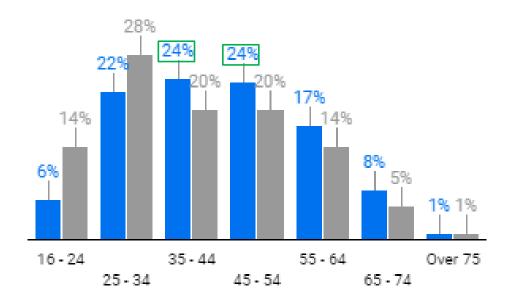


Cross-border destination on same trip

All visitors







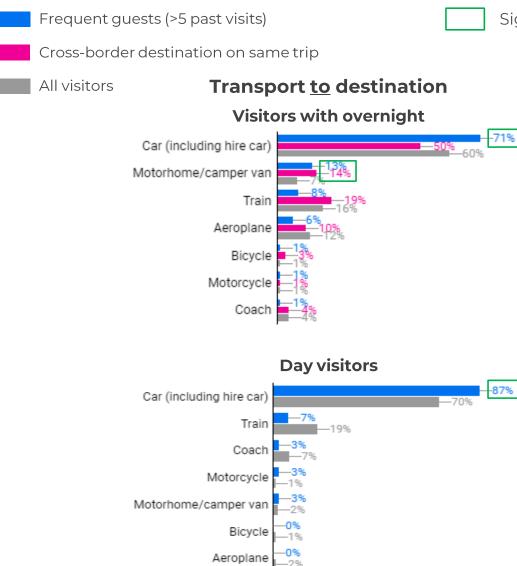
Day visitors



Significantly higher than average

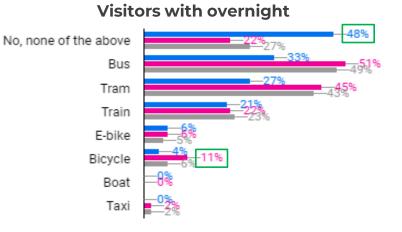
Source: LFT/Ilres Visitor Survey, 2020-2023.

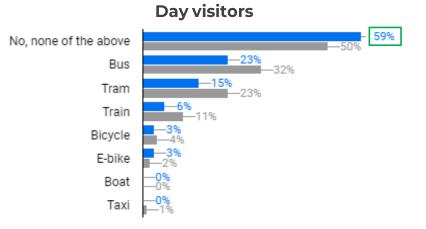
Transport (to and in destination) Inbound leisure visitors, 2020-2023



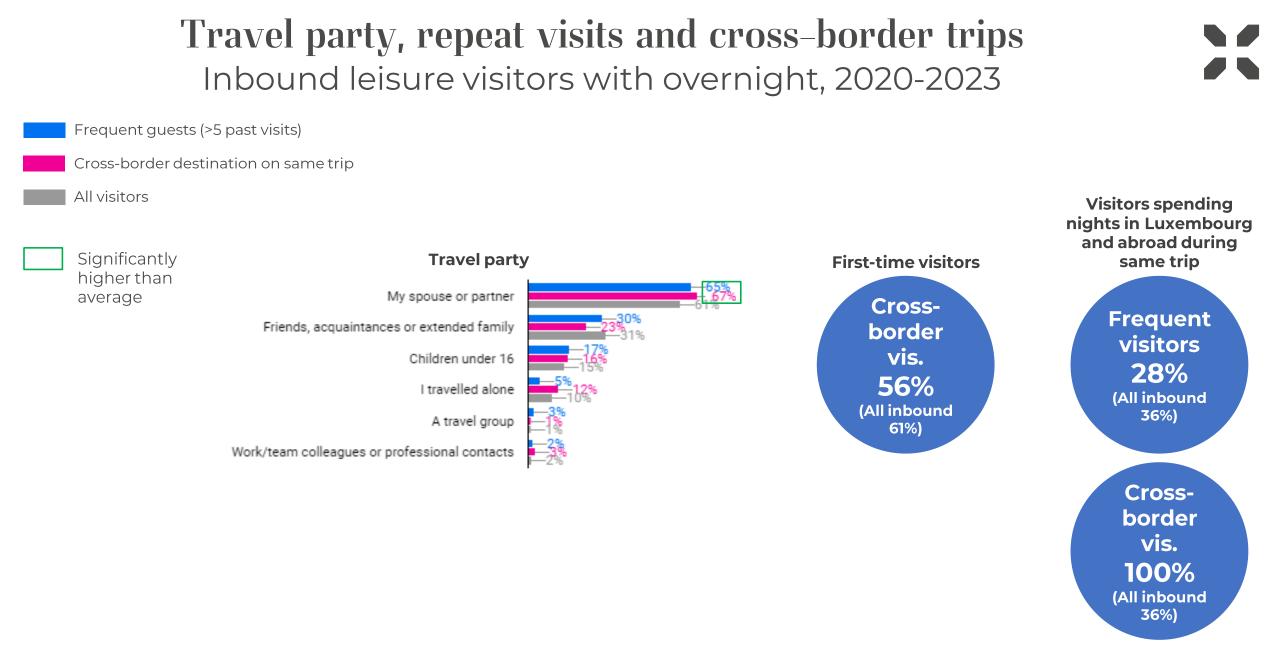
Significantly higher than average

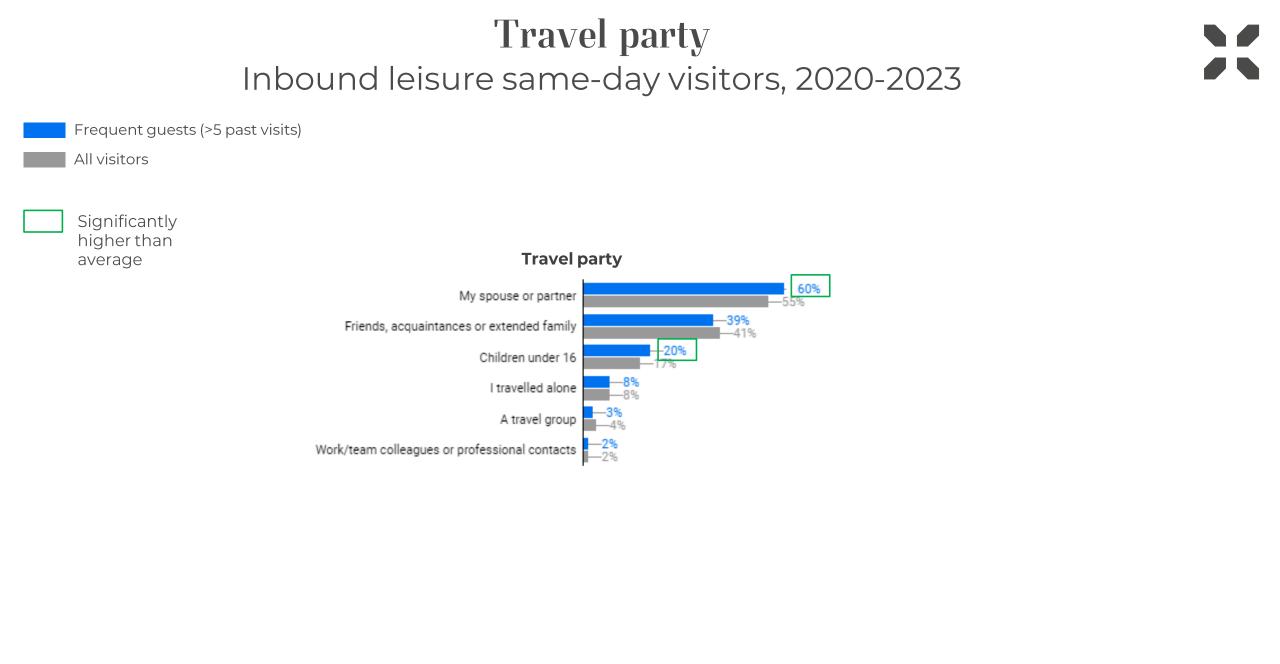
Transport in destination



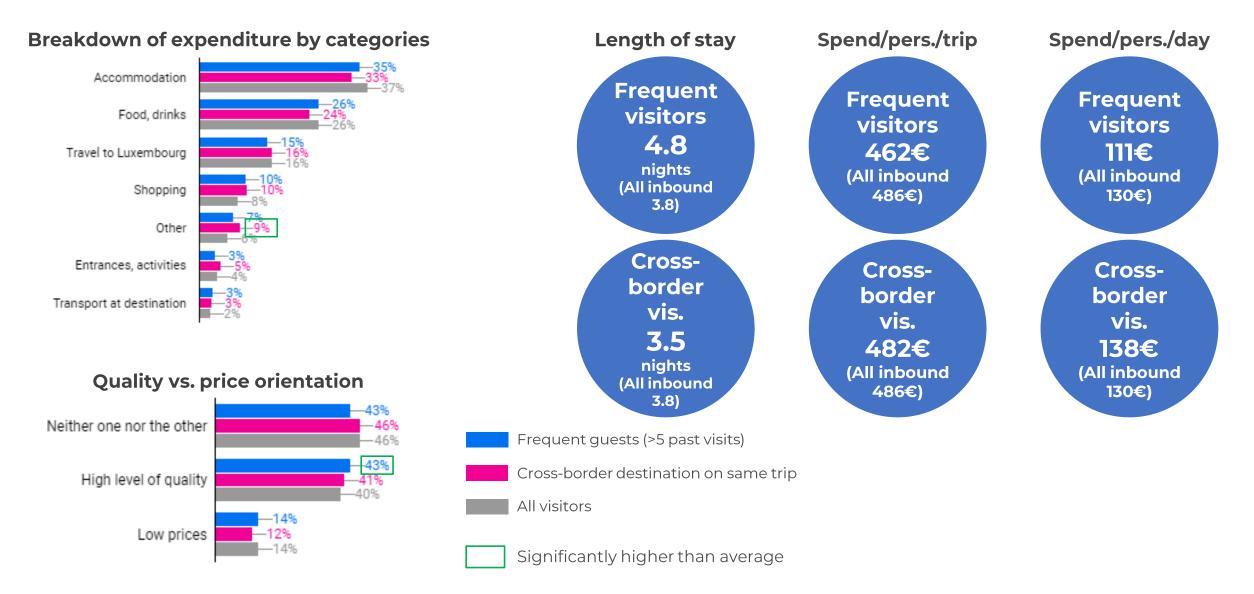


Source: LFT/IIres Visitor Survey, 2020-2023.





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

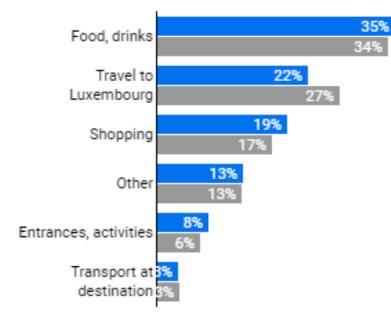


Expenditure Inbound leisure same-day visitors, 2020-2023

Frequent guests (>5 past visits)

All visitors

Breakdown of expenditure by categories



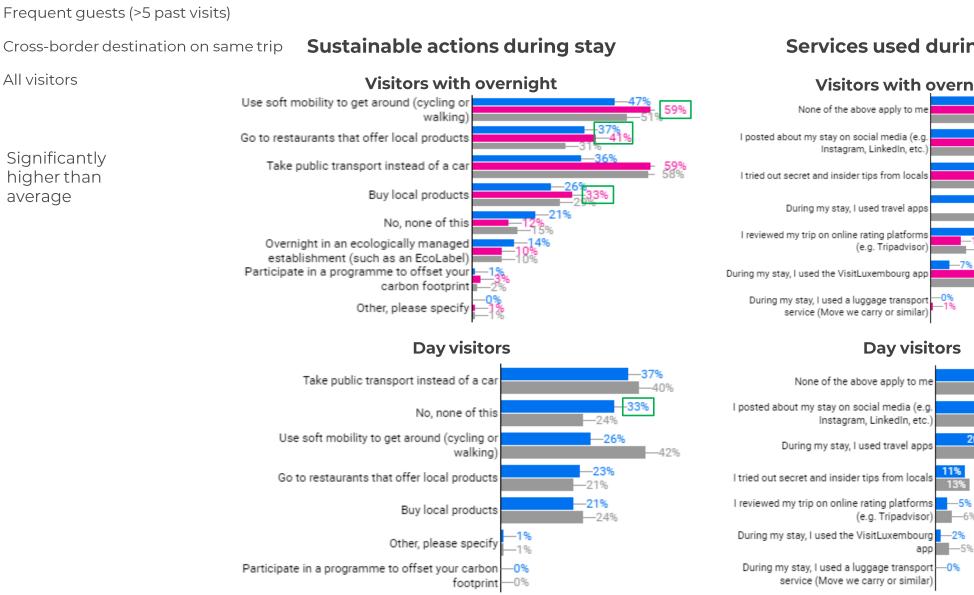


Significantly higher than average

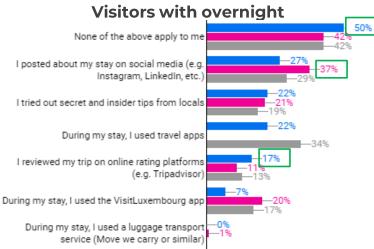
Spend/pers./day trip



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



Services used during stay



Day visitors

28%

20%

-6%

-2%

-0%

23%

34%

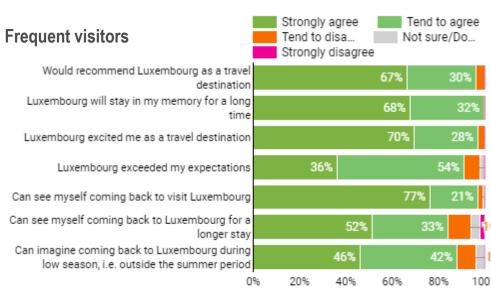
Source: LFT/Ilres

Visitor Survey.

2020-2023.

Visitor satisfaction and recommendation Inbound leisure visitors with overnight, 2020-2023

All visitors		Tend to	ly agree o disa ly disagr	1	Tend to a Not sure/[-
Would recommend Luxembourg as a travel destination				65%	3	2%
Luxembourg will stay in my memory for a long time				65%	3	34%
Luxembourg excited me as a travel destination				66%	3	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			42%		38%	—10
09	6	20%	40%	60%	80%	1009



Cross-border destination

Would recommend Luxembourg as a travel destination			64%	32%
Luxembourg will stay in my memory for a long time			67%	30%
Luxembourg excited me as a travel destination	65%			31%
Luxembourg exceeded my expectations		49%		44%
Can see myself coming back to visit Luxembourg			65%	25%
Can see myself coming back to Luxembourg for a longer stay	4	2%	29%	20%
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period	34%		39%	—10 <mark>81</mark>

Visitor satisfaction and recommendation Inbound leisure same-day visitors, 2020-2023

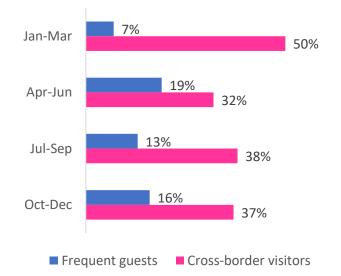
Frequent visitors		Tend	gly agr to dis gly disag			to agr ure/D
Would recommend Luxembourg as a destination for an excursion				7	5%	25%
Luxembourg will stay in my memory for a long time				66%		33% -
Luxembourg excited me as a destination for an excursion				7	5%	24%
Luxembourg exceeded my expectations		27%			599	6 - 8
Can see myself coming back to visit Luxembourg					82%	17% -
Can see myself coming back to Luxembourg for a longer stay			52%	6	26%	16%
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period				63%		33%
0	%	20%	40%	60%	80	% 100

All visitors

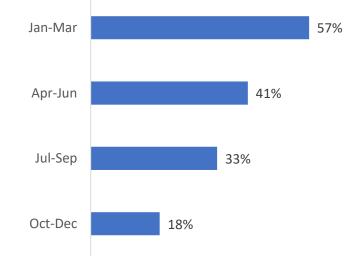
Would recommend Luxembourg as a destination for an excursion		70% 26%
Luxembourg will stay in my memory for a long time	64	% 33%
Luxembourg excited me as a destination for an excursion		71% 27%
Luxembourg exceeded my expectations	37%	52%
Can see myself coming back to visit Luxembourg		71% 23%
Can see myself coming back to Luxembourg for a longer stay	43%	36% 14%
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period	52%	33%

Trip seasonality Inbound leisure visitors, 2020-2023

Visitors with overnight



Day visitors

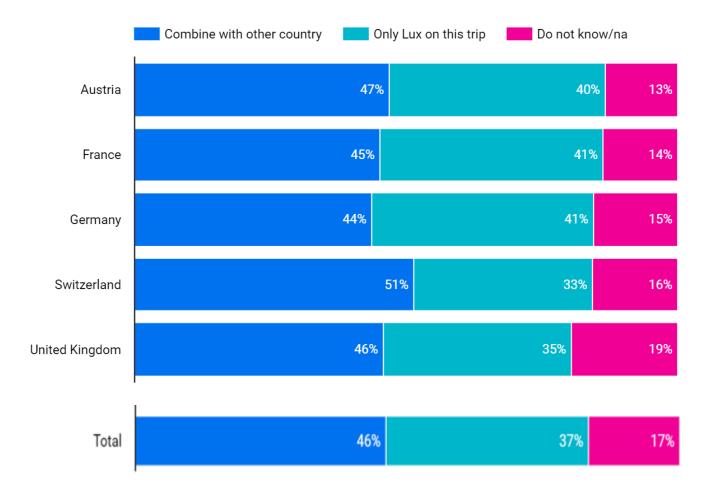


Source: LFT/IIres Visitor Survey, 2020-2023.

X

Growth Potential for Cross-border travellers segment

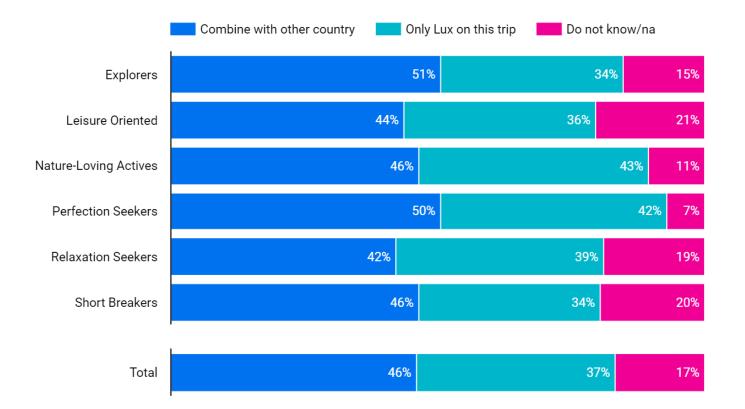
Interest of potential travellers (*) to combine Luxembourg with another destination during their trip



(*) Who have heard of Luxembourg as a destination (i.e., supported awareness)

Source: LFT Brand & Potential Studies.

Interest of potential travellers (*) to combine Luxembourg with another destination during their trip LFT target segments



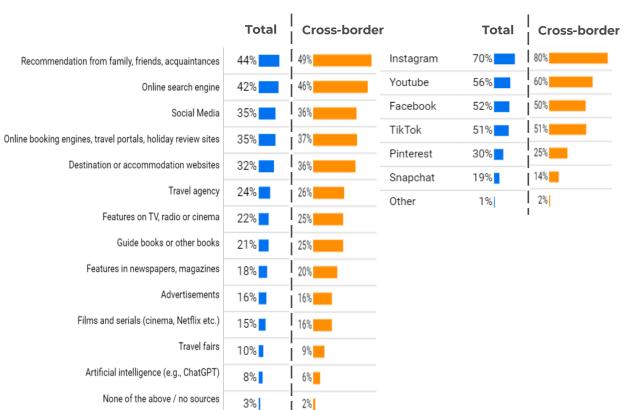
n.b. : Further information, e.g. for past visitors and new potential visitors can be found in LFT's Brand & Potential Study report.

(*) Who have heard of Luxembourg as a destination (i.e., supported awareness)

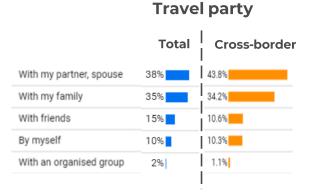
Source: LFT Brand & Potential Studies.

Trip organisation and preferences (1) (*)

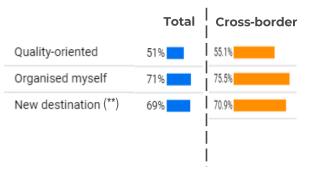
 Average European source markets, total vs. travellers interested in combining Luxembourg with another destination during their trip



Preferred sources of travel inspiration



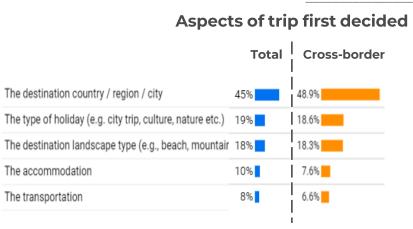
Quality orientation, self-organisation, new destination



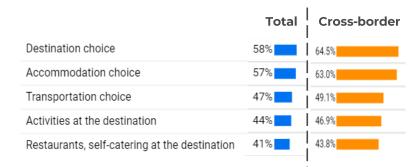
(*) During last outbound holiday trip . (**) Travelled to a destination never visited before.

Trip organisation and preferences (2) (*)

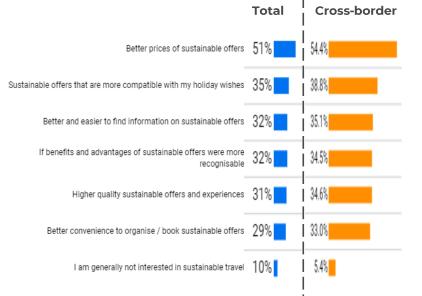
Average European source markets, total vs. travellers interested in combining Luxembourg with another destination during their trip



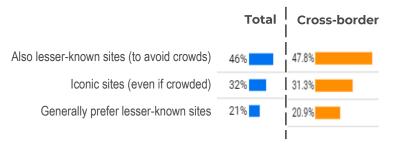
Importance of sustainability for choice of trip components



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.

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Your contact



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