



Luxembourg for Tourism  
**Theme profile**  
**HIKING**  
**2023**





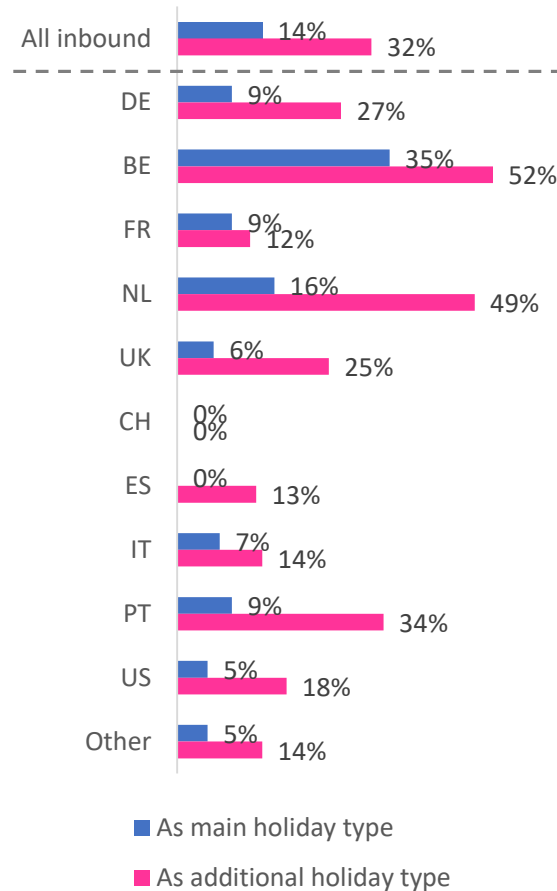
# Market size of Hiking segment

# Volume of leisure visitors with Hiking as a holiday type

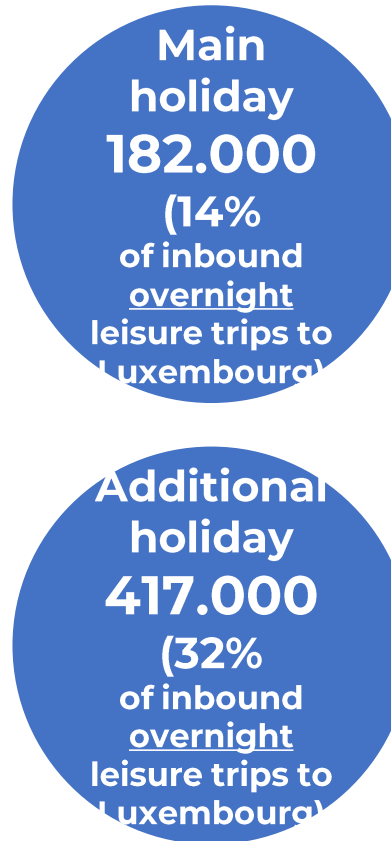
## Overnight trips



Share of visitors with Hiking as a holiday type by source markets



Number of overnight trips to Luxembourg (estimate 2023)



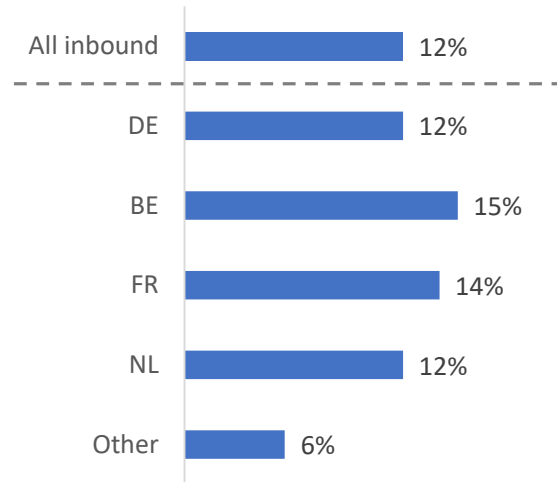
	Overnight trips: Main holiday	Overnight trips: Additional holiday
DE	17.000	52.000
BE	80.000	119.000
FR	12.000	16.000
NL	53.000	162.000
Other	20.000	68.000

# Volume of leisure visitors with Hiking as an excursion type



## Same-day trips

Share of visitors with Hiking as an excursion type by source markets



Number of trips / excursions to Luxembourg (estimate 2023)

**336.000**  
(12%  
of inbound  
same-day  
leisure trips to  
Luxembourg)

	Same-day trips
DE	73.000
BE	90.000
FR	94.000
NL	49.000
Other	28.000



**Travel behaviour of leisure visitors with  
Hiking as a holiday type / excursion  
in Luxembourg**

# Holiday types

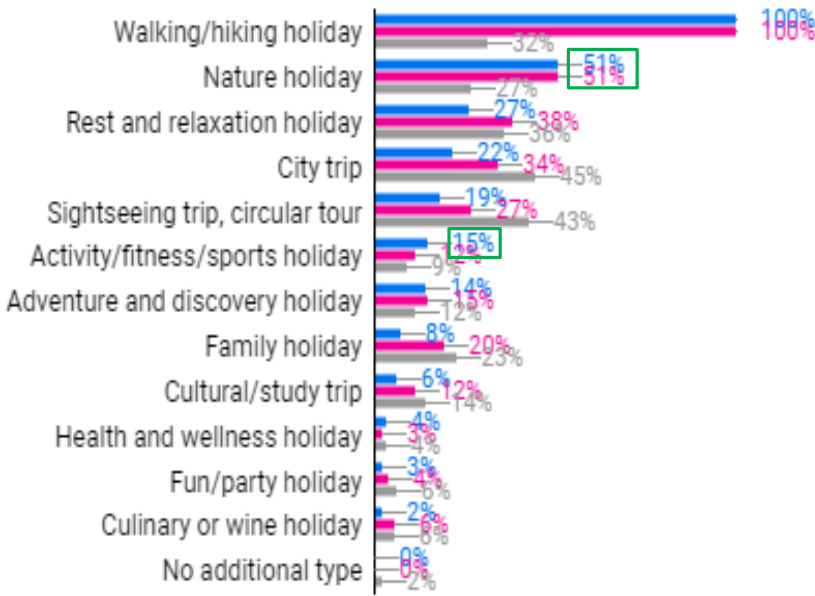
## Inbound leisure visitors with overnight, 2020-2023



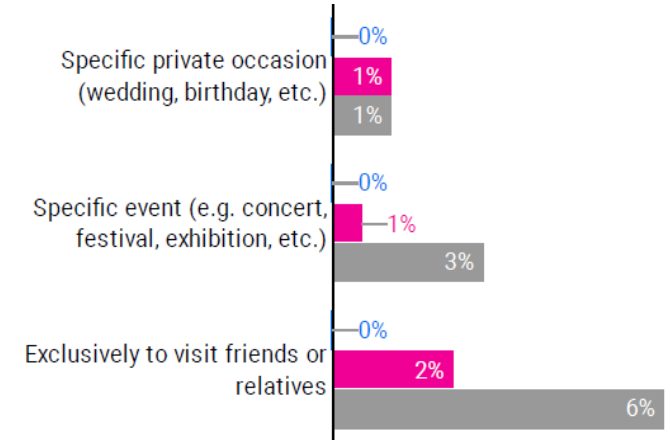
### Main holiday types



### Additional holiday types



### Main purpose of overnight trip (if not holiday)



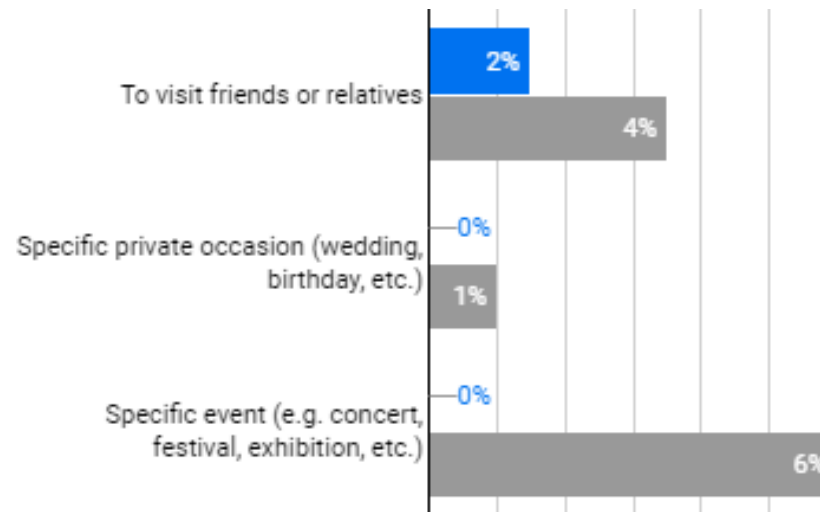
# Types of excursions

## Inbound leisure same-day visitors, 2020-2023



- Hiking as excursion type
- All visitors

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



# Key decision criteria for choosing Luxembourg (\*)

## Inbound leisure visitors, 2020-2023



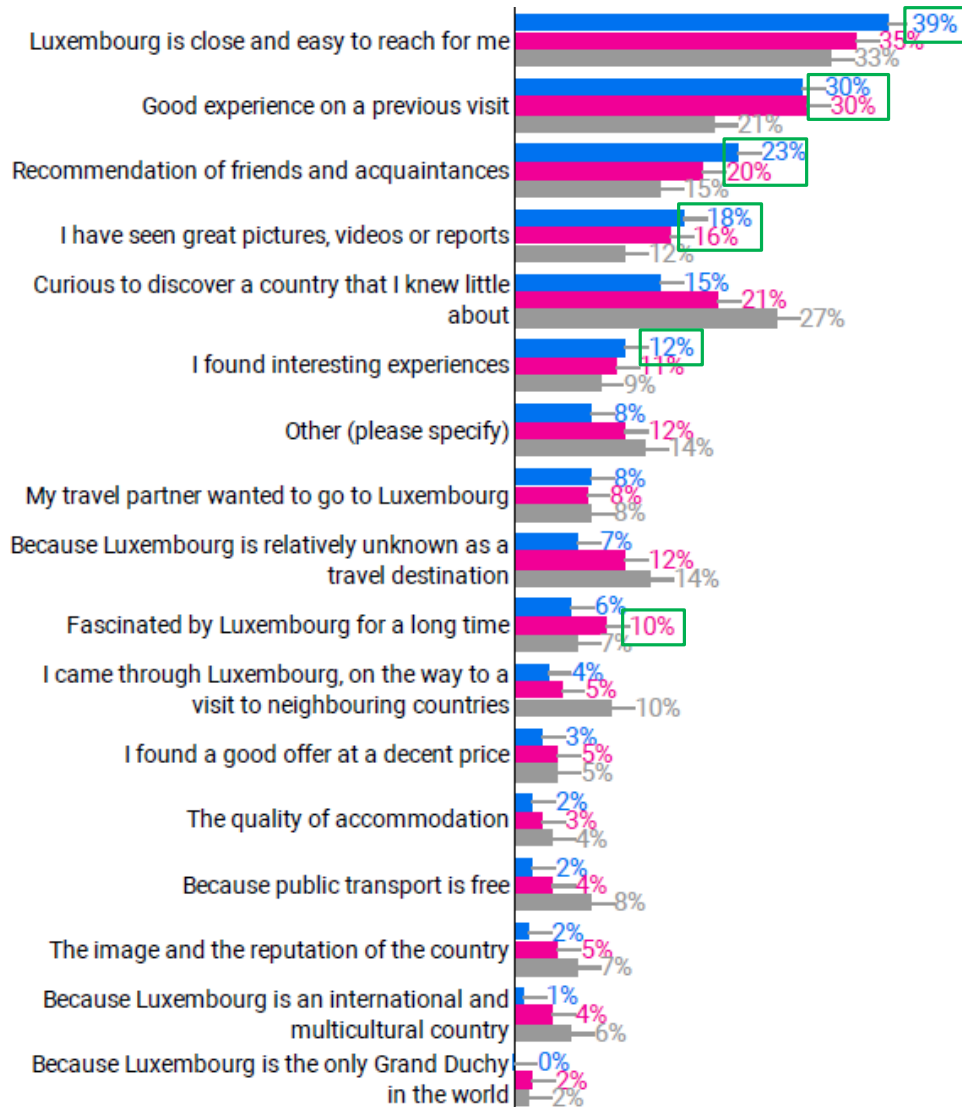
■ Hiking as main holiday/excurs. type

■ Hiking as additional holiday type

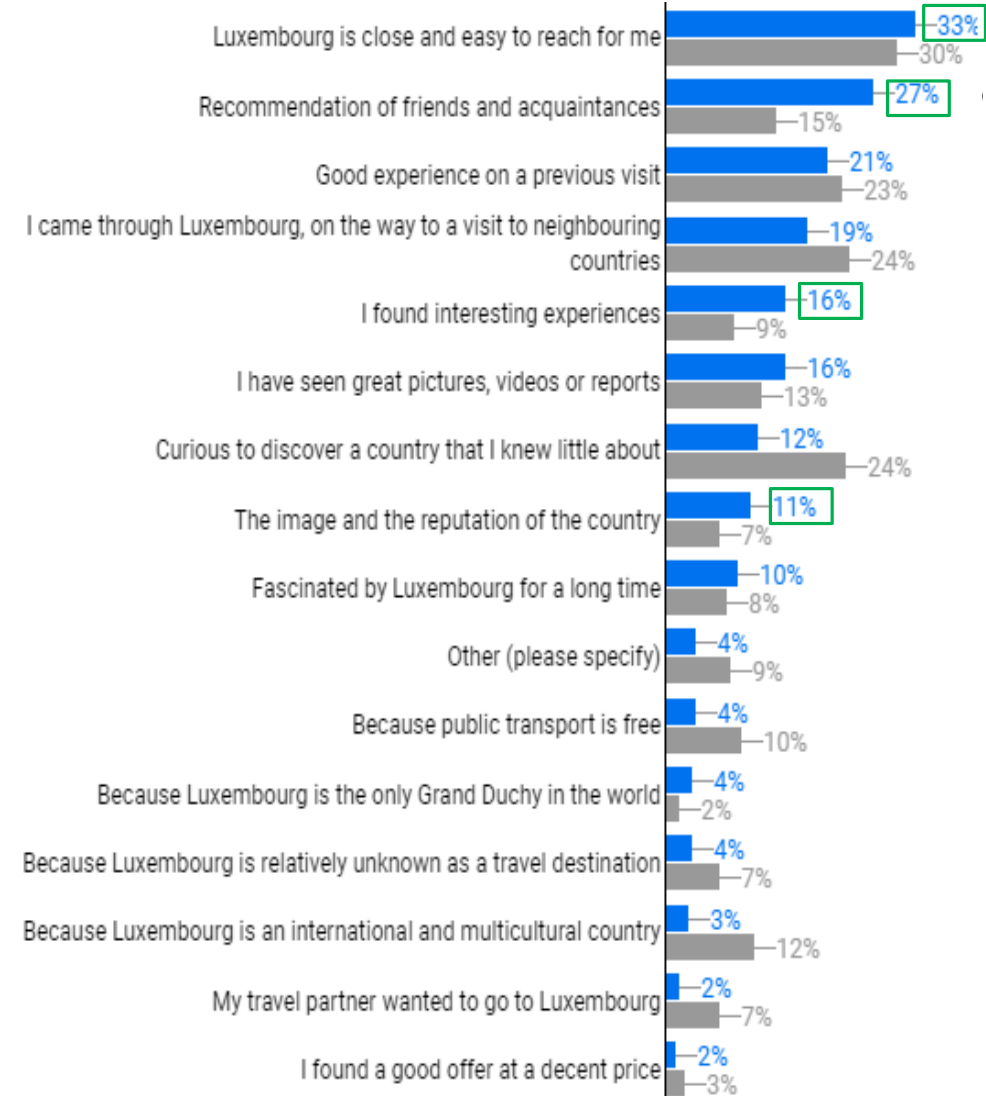
■ All visitors

   Significantly higher than average

### Visitors with overnight



### Day visitors



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

(\*) Maximum 3 answers possible.

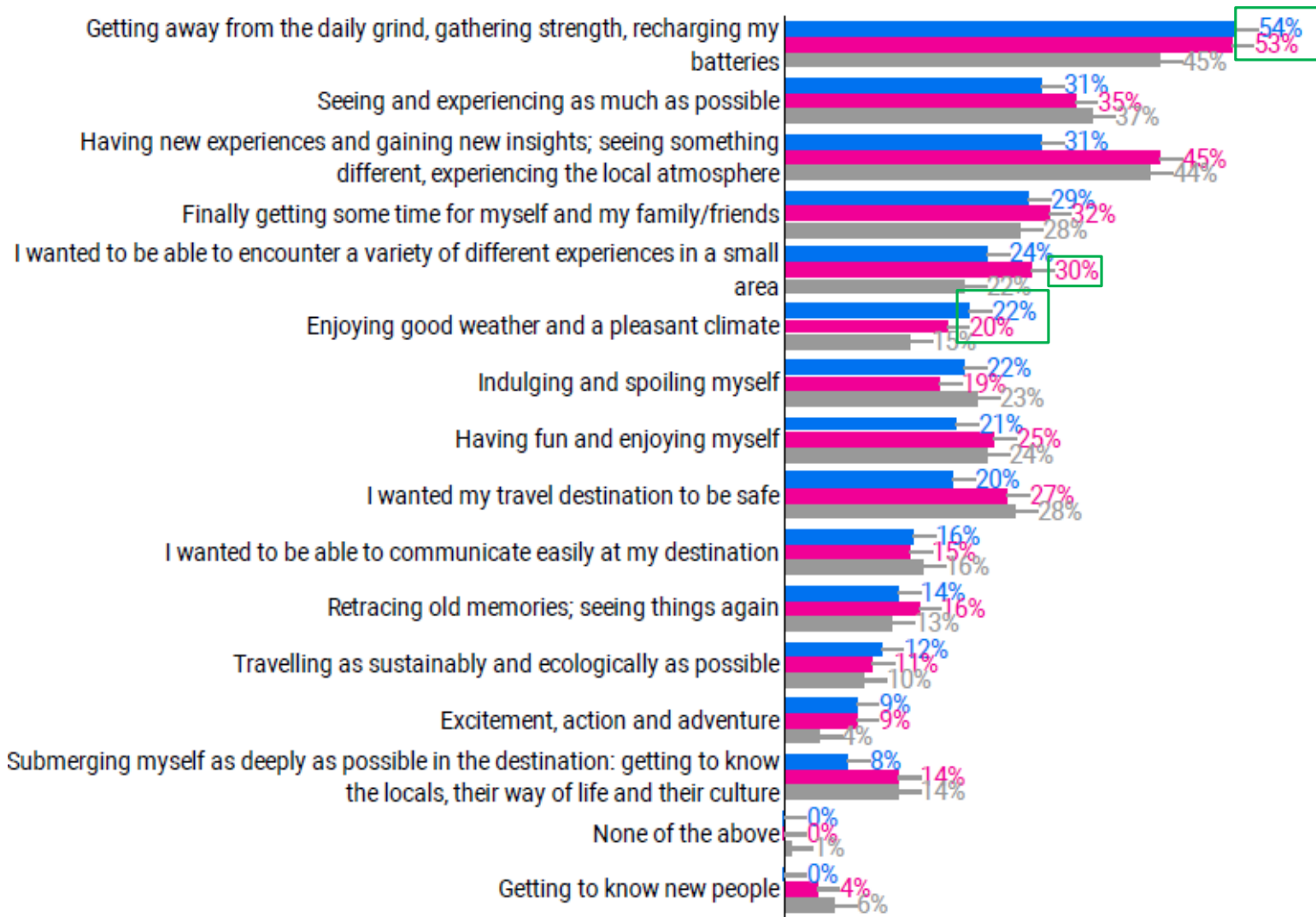


# Key travel motives and emotions

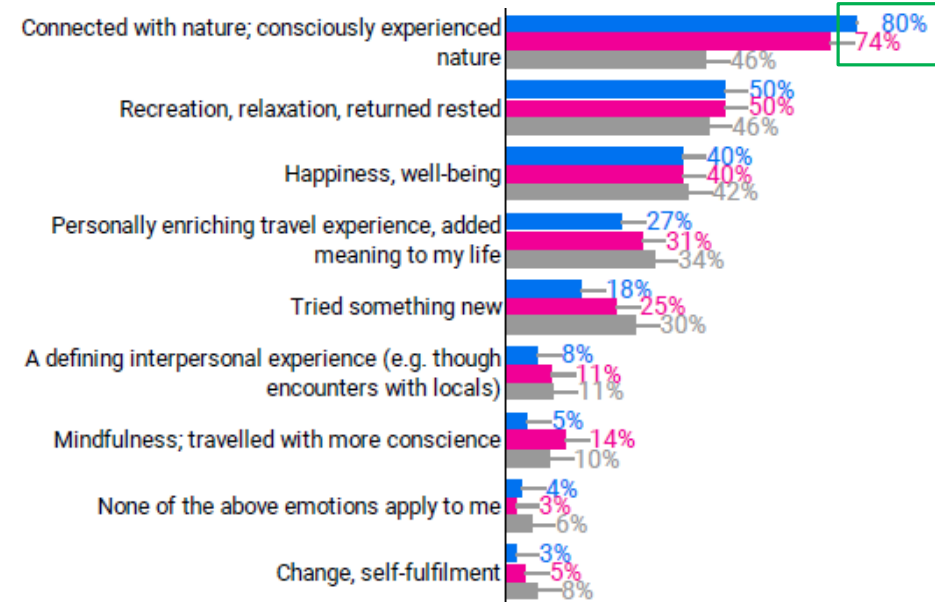
Inbound leisure visitors with overnight, 2020-2023



## Travel motives



## Emotions experienced during stay



- Hiking as main holiday type
- Hiking as additional holiday type
- All visitors

  Significantly higher than average

# Inspiration sources

## Inbound leisure visitors, 2020-2023



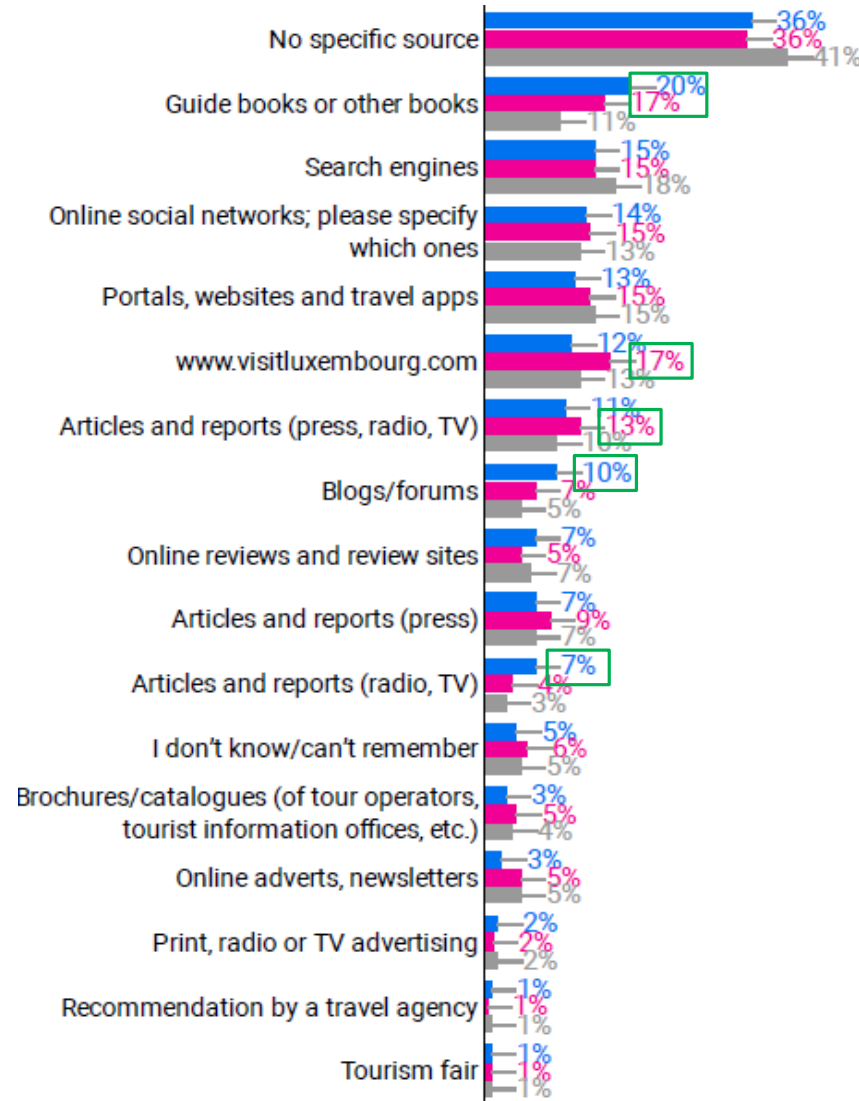
■ Hiking as main holiday/excurs. type

■ Hiking as additional holiday type

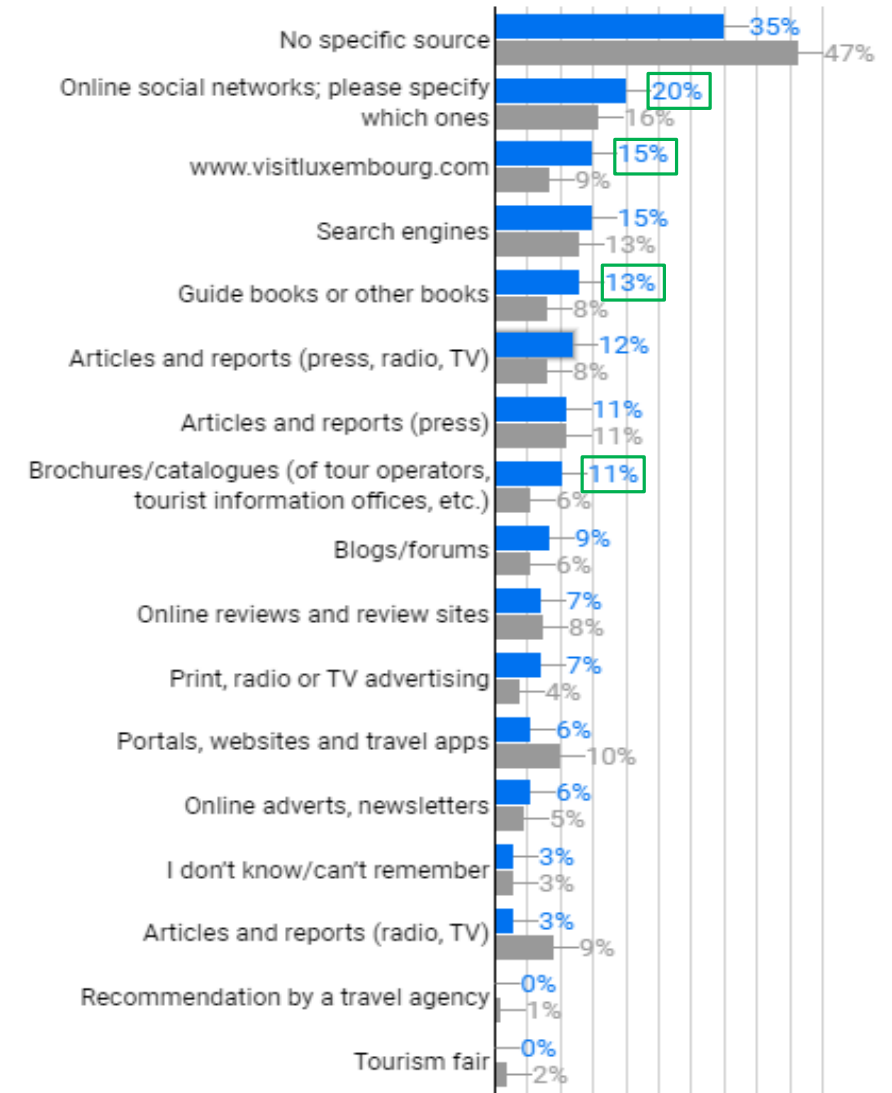
■ All visitors

   Significantly higher than average

### Visitors with overnight



### Day visitors



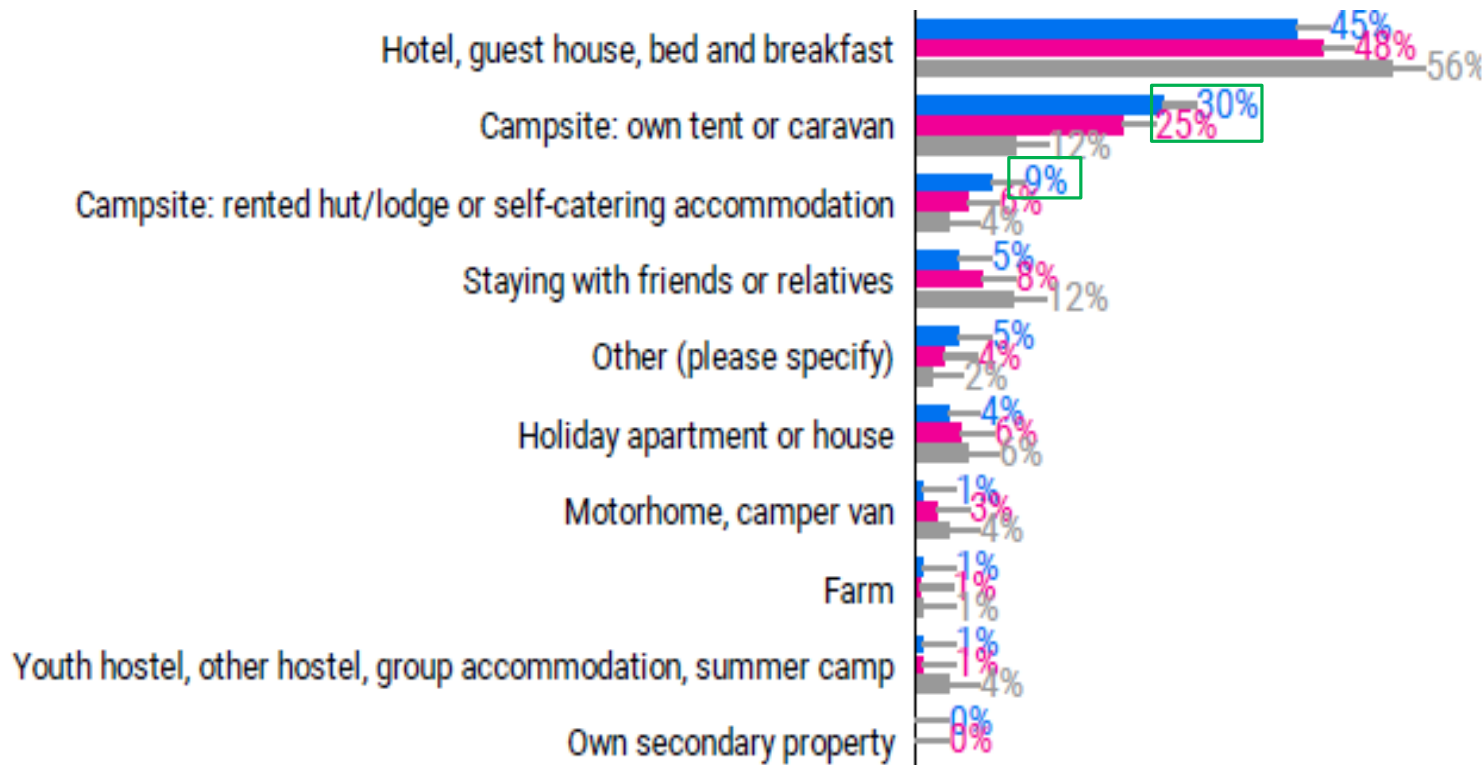
# Type of accommodation, destination regions

## Inbound leisure visitors with overnight, 2020-2023

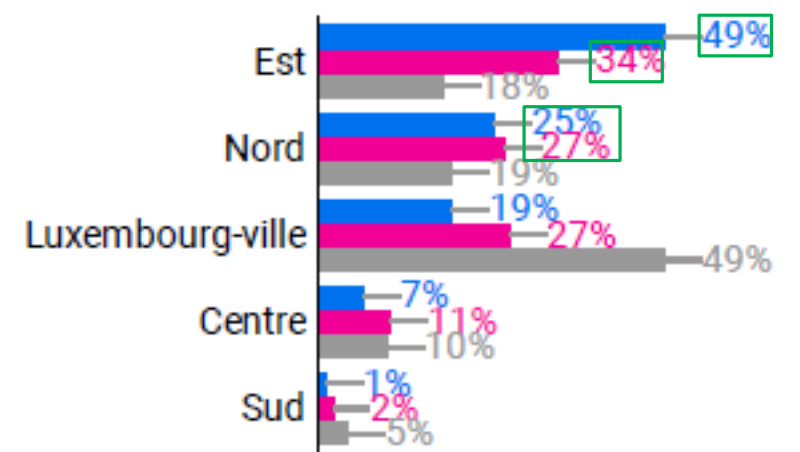


- Hiking as main holiday type
- Hiking as additional holiday type
- All visitors

**Type of accommodation**



**Destination region**



  Significantly higher than average



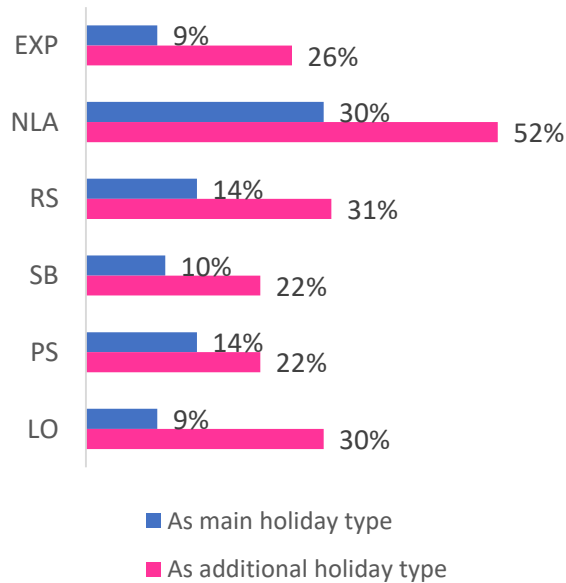
# Target segments

## Inbound leisure visitors, 2020-2023

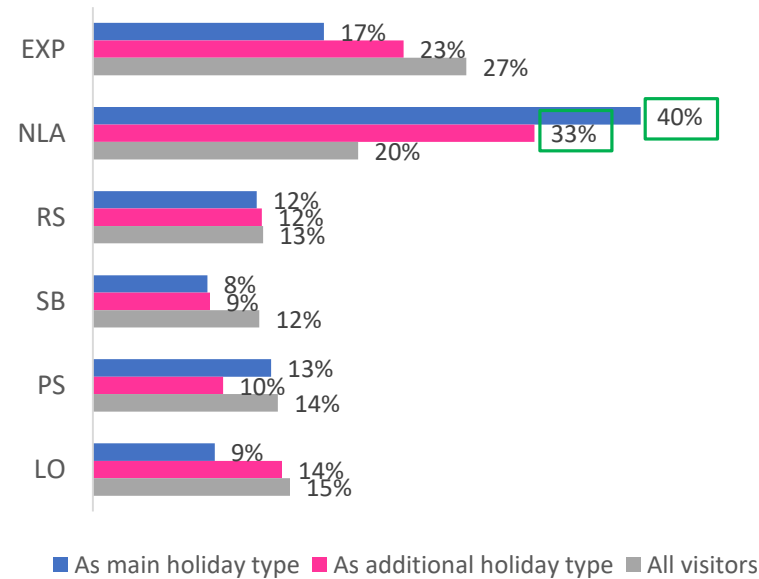
EXP – Explorers  
 NLA – Nature-Loving Actives  
 RS – Relaxation Seekers  
 SB – Short Breakers  
 PS – Perfection Seekers  
 LO – Leisure Oriented

  Significantly higher than average

### Visitors with overnight

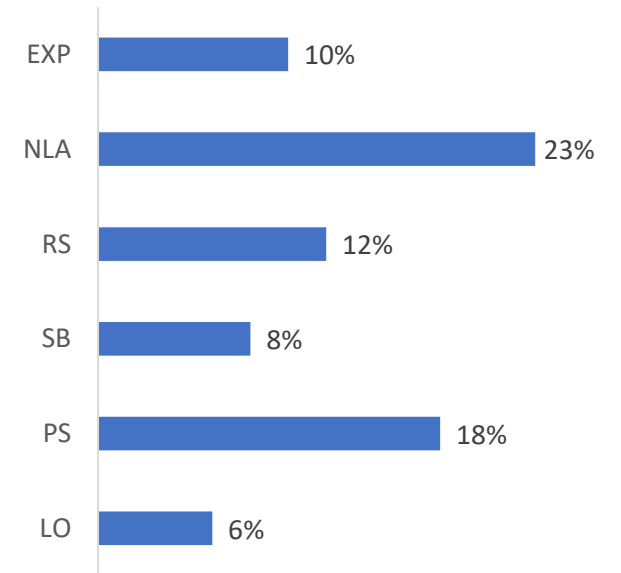


Reading example: 9% of Explorers have hiking as main holiday type



Reading example: 17% of visitors with hiking as main holiday type are Explorers

### Day visitors



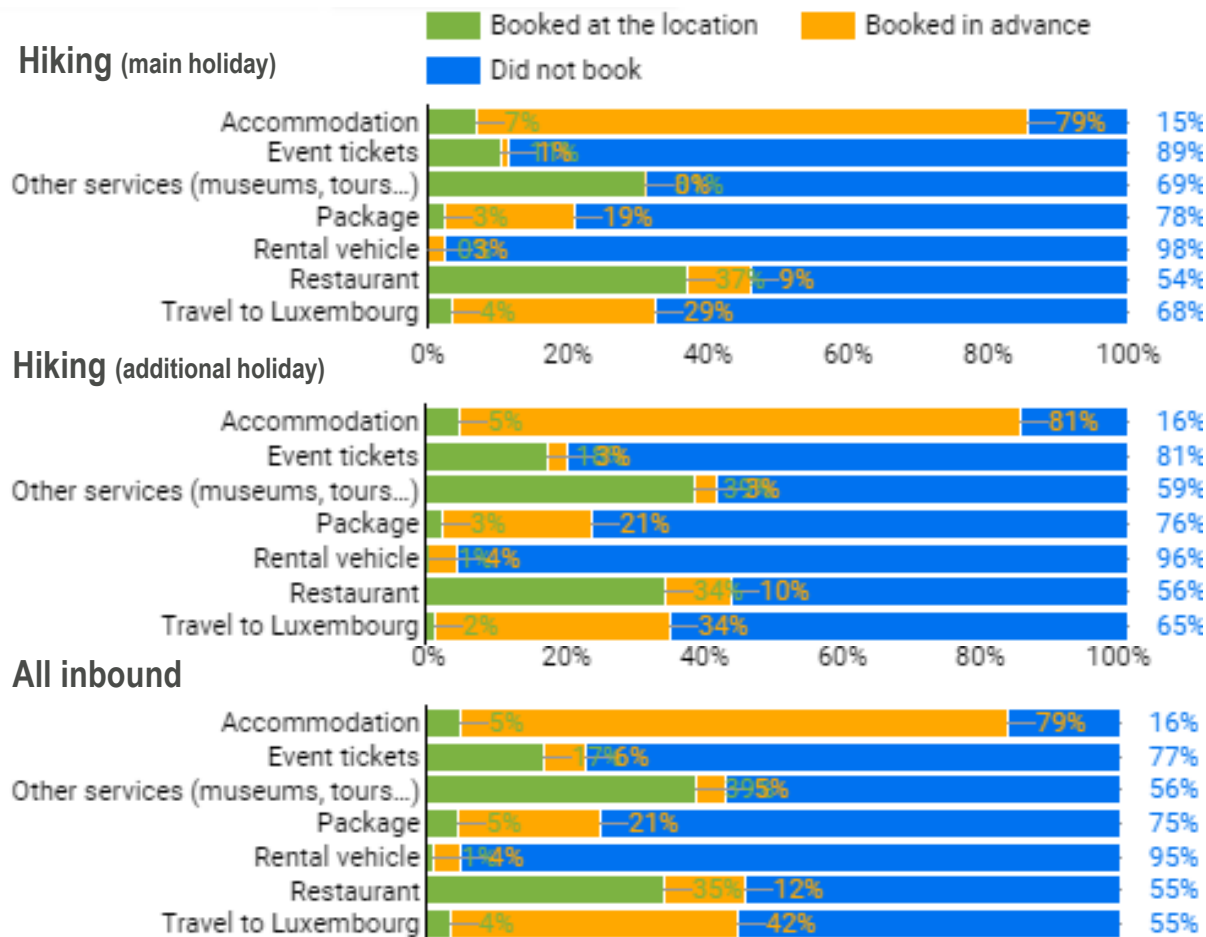


# Booking behaviour

## Inbound leisure visitors with overnight, 2020-2023

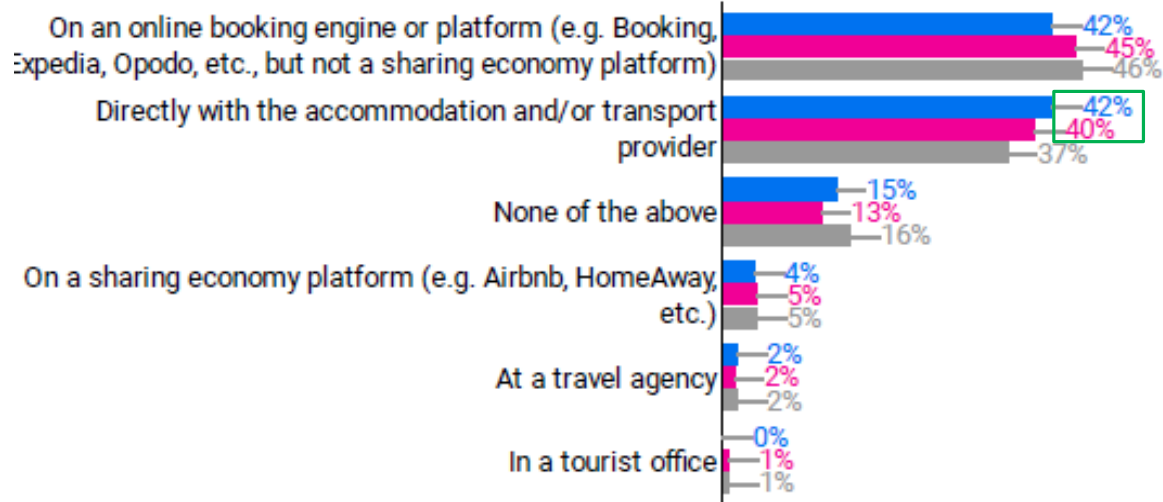


### Booking of travel items



- Hiking as main holiday type
- Hiking as additional holiday type
- All visitors

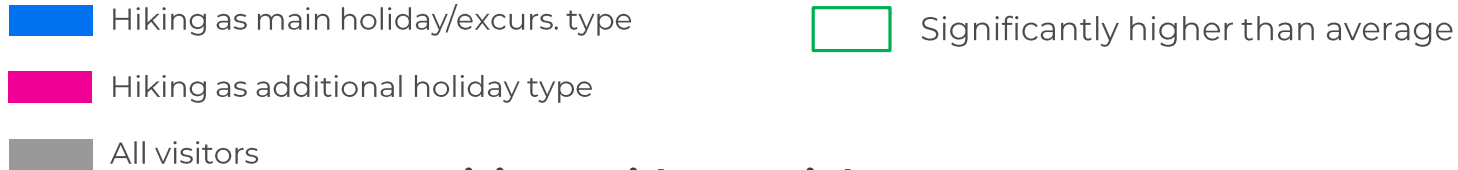
### Booking channels



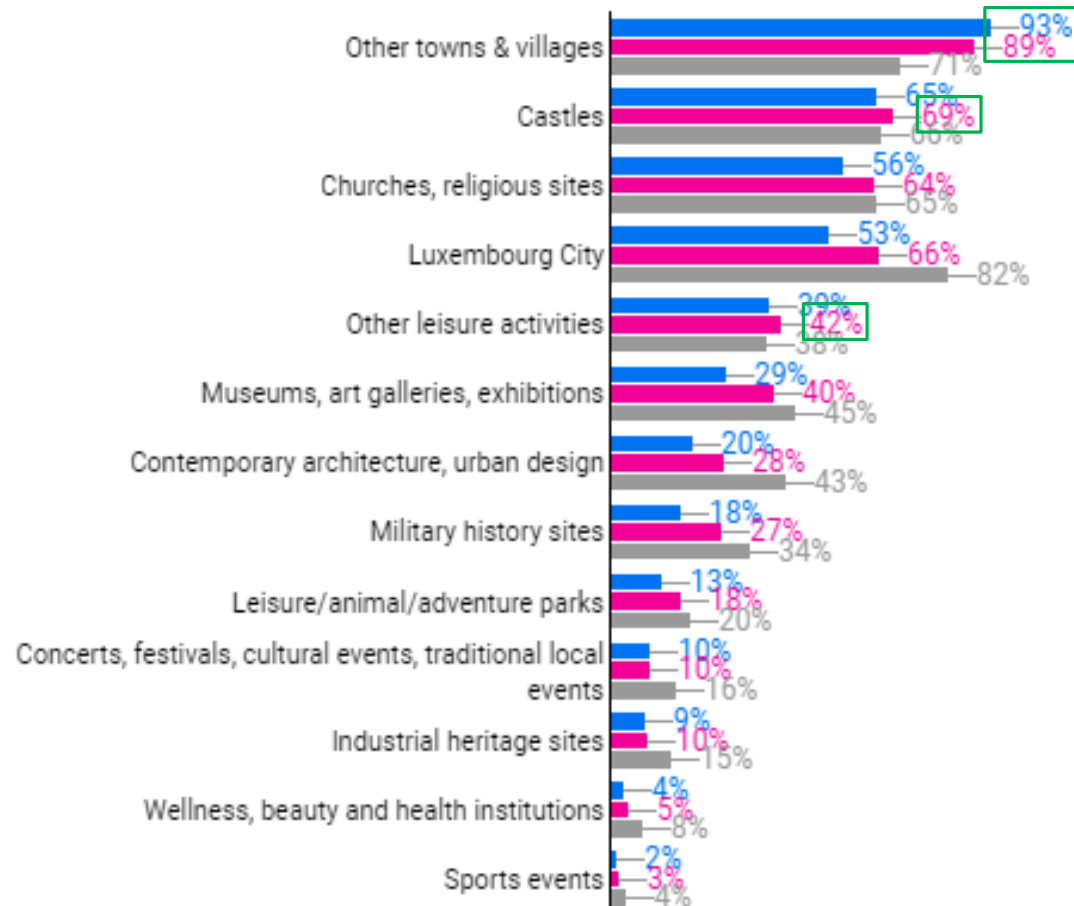
   Significantly higher than average

# Places visited during leisure stays

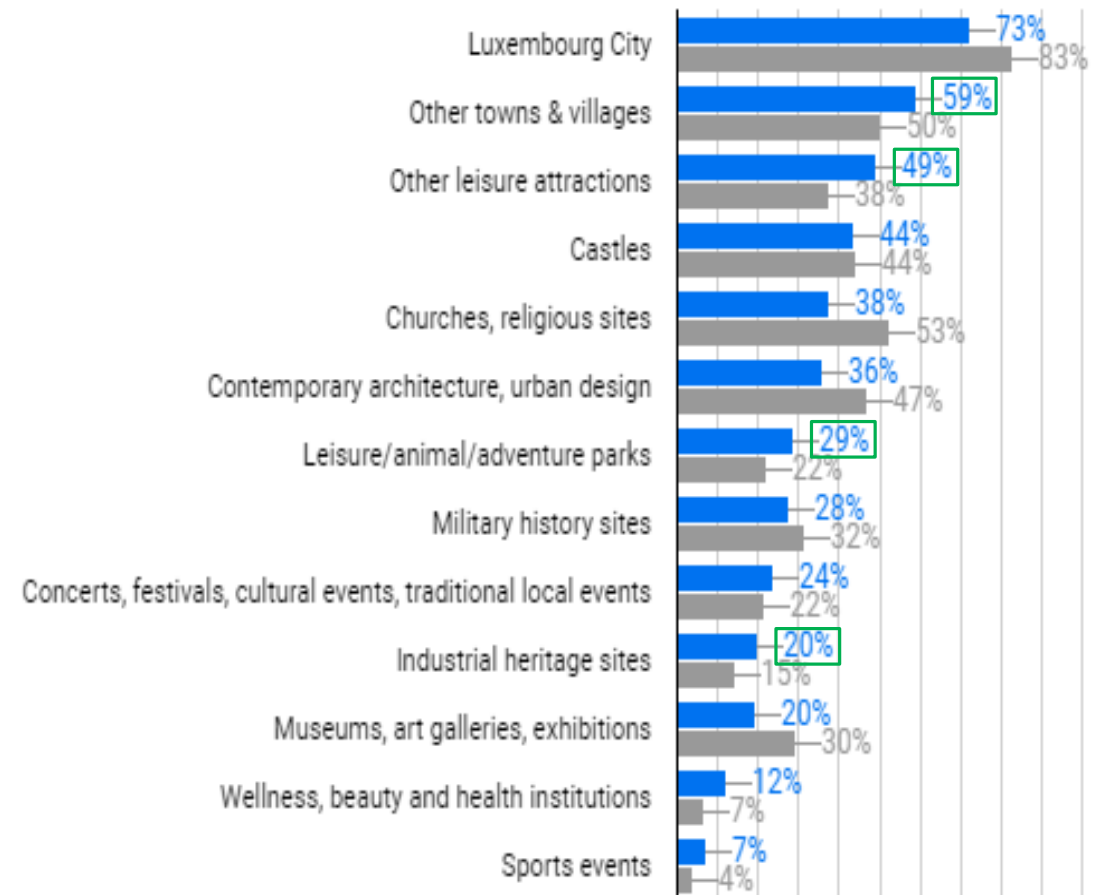
## Inbound leisure visitors, 2020-2023



### Visitors with overnight



### Day visitors

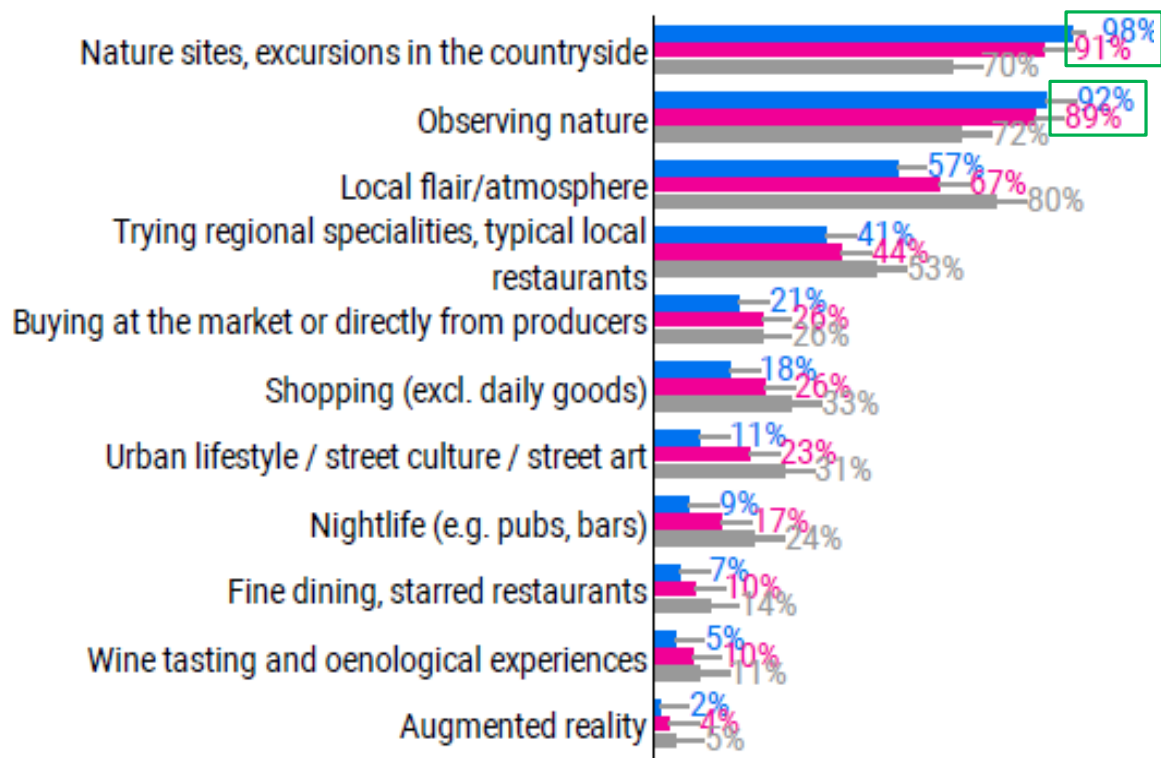


# Non-sporting activities undertaken during leisure stays

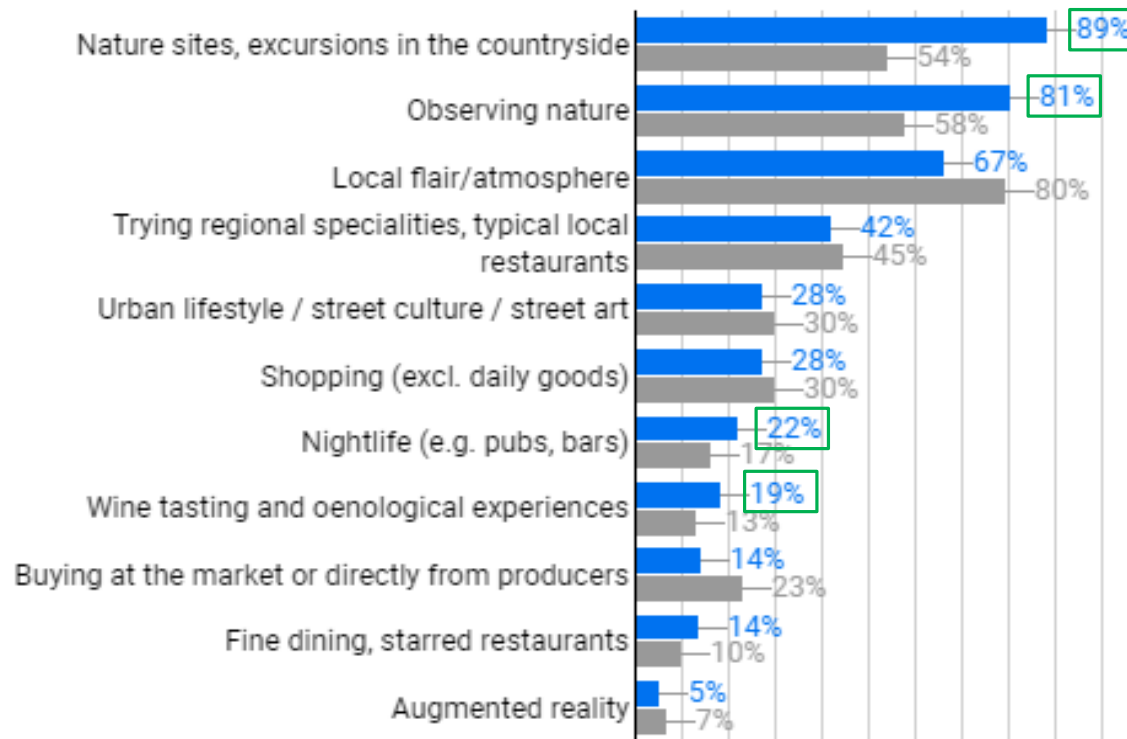
## Inbound leisure visitors, 2020-2023



### Visitors with overnight



### Day visitors

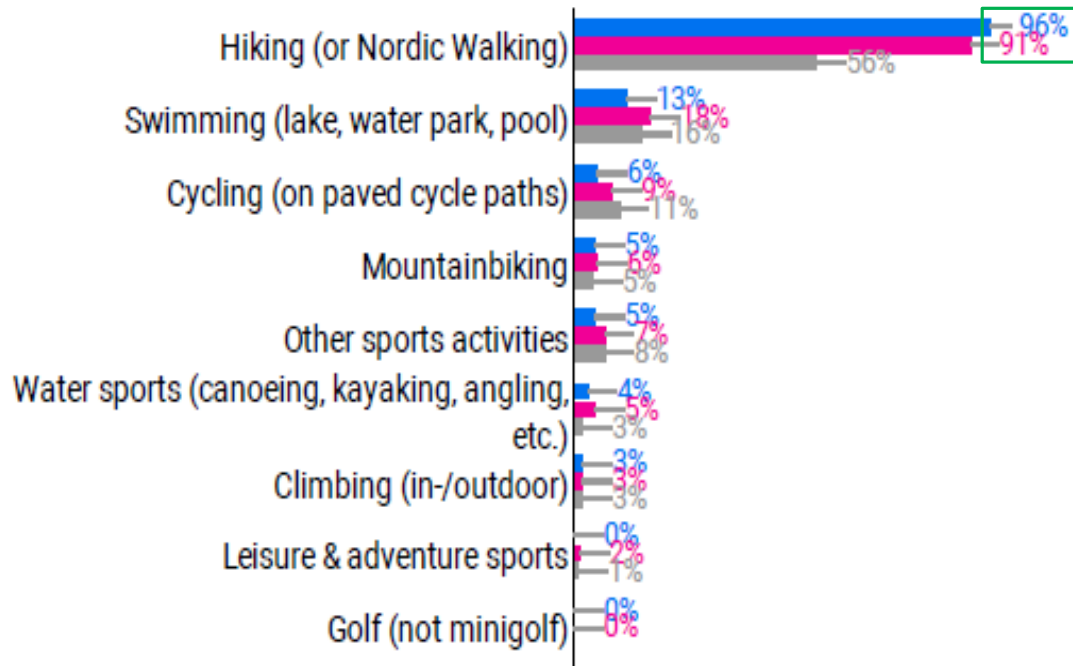


# Sporting activities undertaken during leisure stays

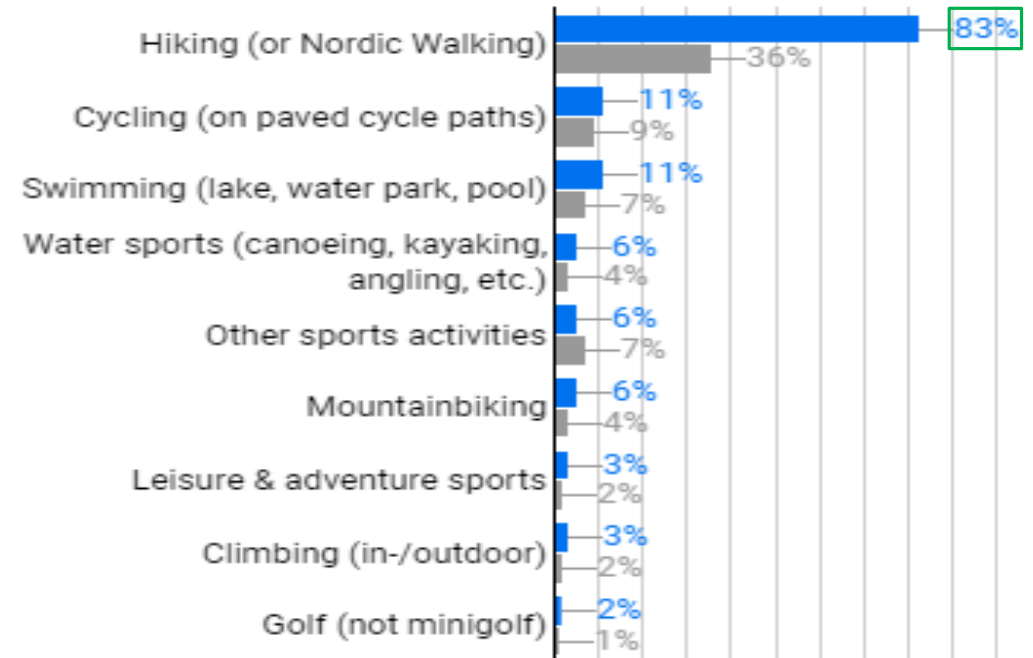
## Inbound leisure visitors, 2020-2023



### Visitors with overnight



### Day visitors





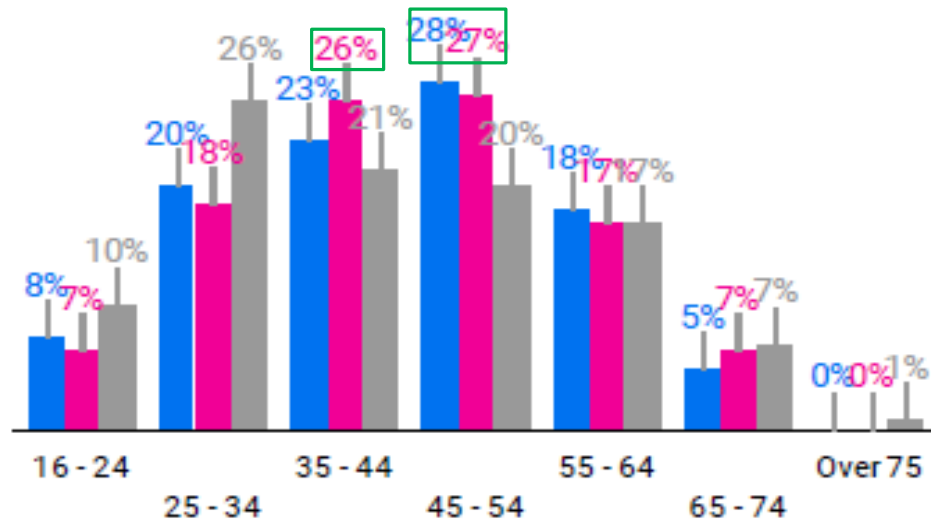


# Age groups

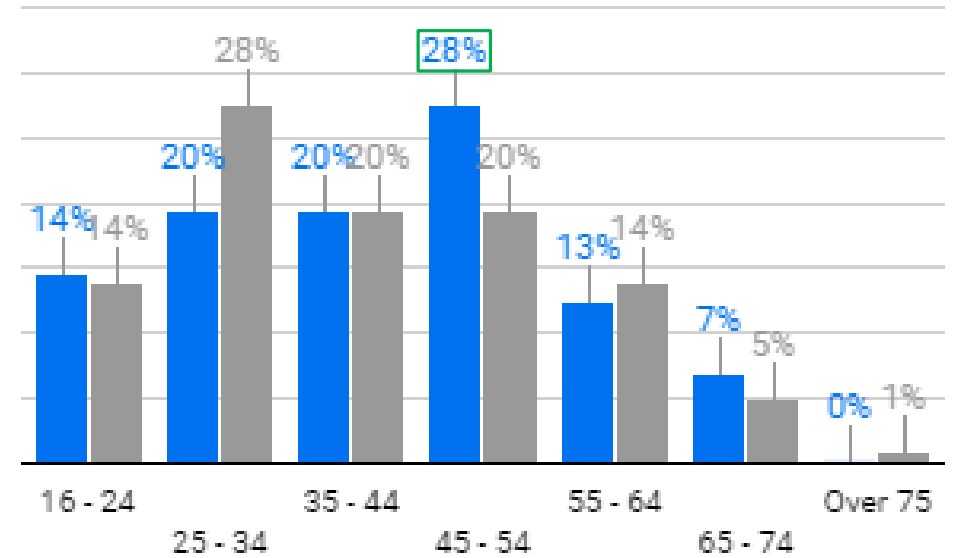
## Inbound leisure visitors, 2020-2023

- Hiking as main holiday/excurs. type
- Hiking as additional holiday type
- All visitors

### Visitors with overnight



### Day visitors



Significantly higher than average

# Transport (to and in destination)

## Inbound leisure visitors, 2020-2023



■ Hiking as main holiday/excurs. type

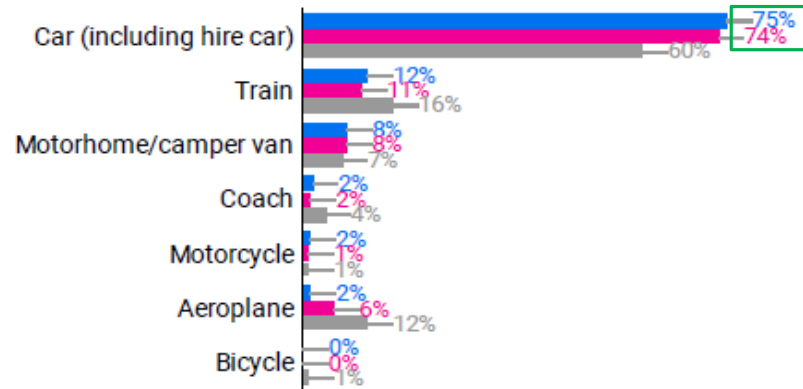
■ Hiking as additional holiday type

■ All visitors

    Significantly higher than average

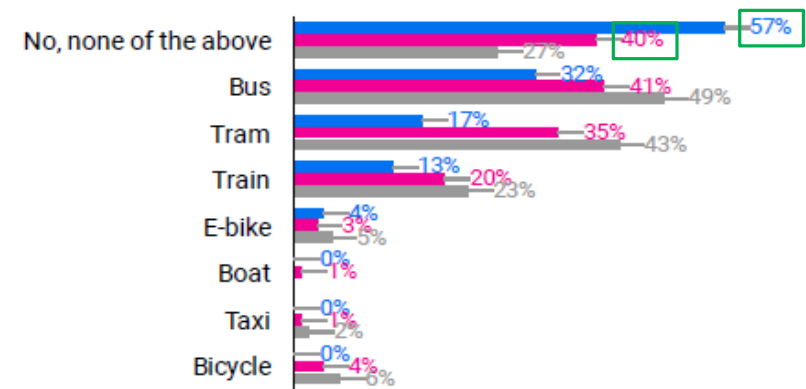
### Transport to destination

#### Visitors with overnight

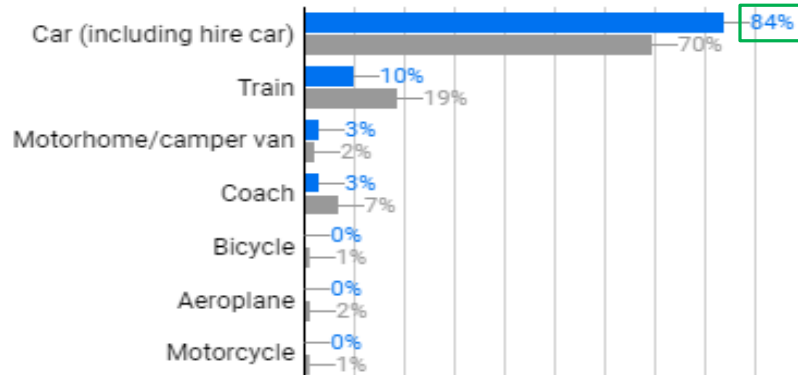


### Transport in destination

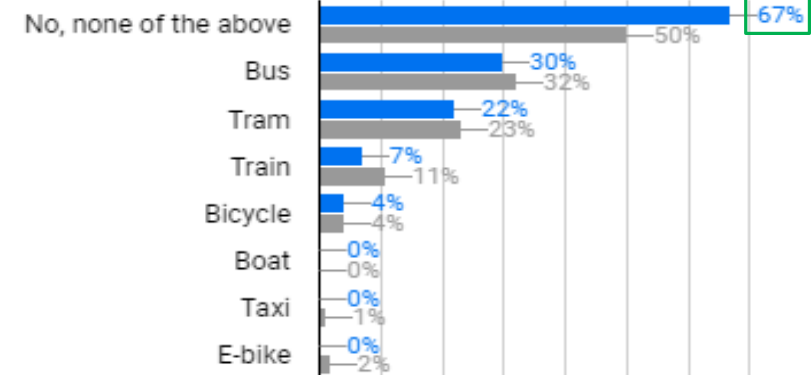
#### Visitors with overnight



### Day visitors



### Day visitors



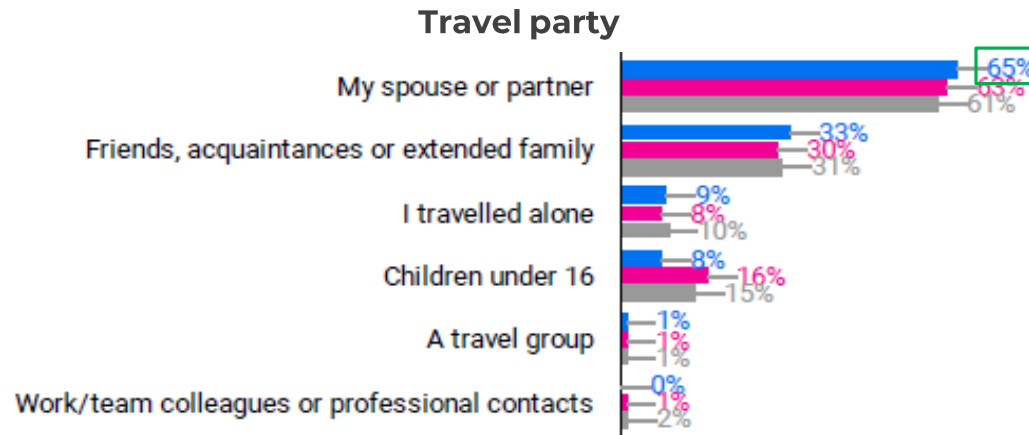
# Travel party, repeat visits and cross-border trips

## Inbound leisure visitors with overnight, 2020-2023

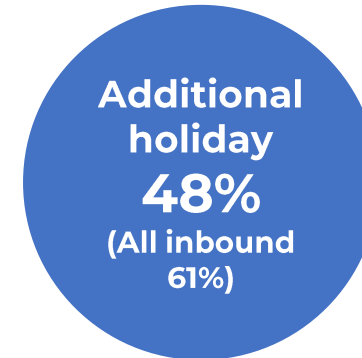
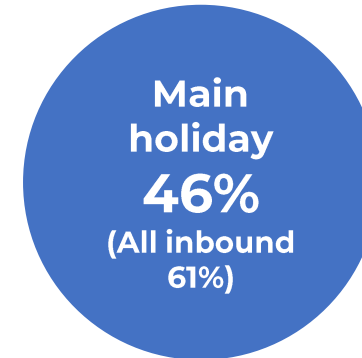


- Hiking as main holiday type
- Hiking as additional holiday type
- All visitors

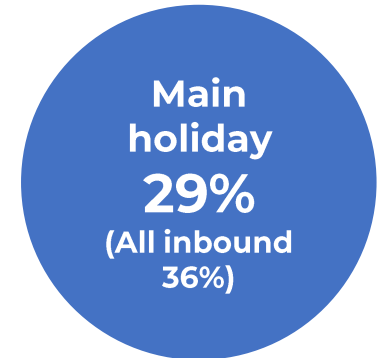
   Significantly higher than average



### First-time visitors



### Visitors spending nights in Luxembourg and abroad during same trip




# Travel party and repeat visits

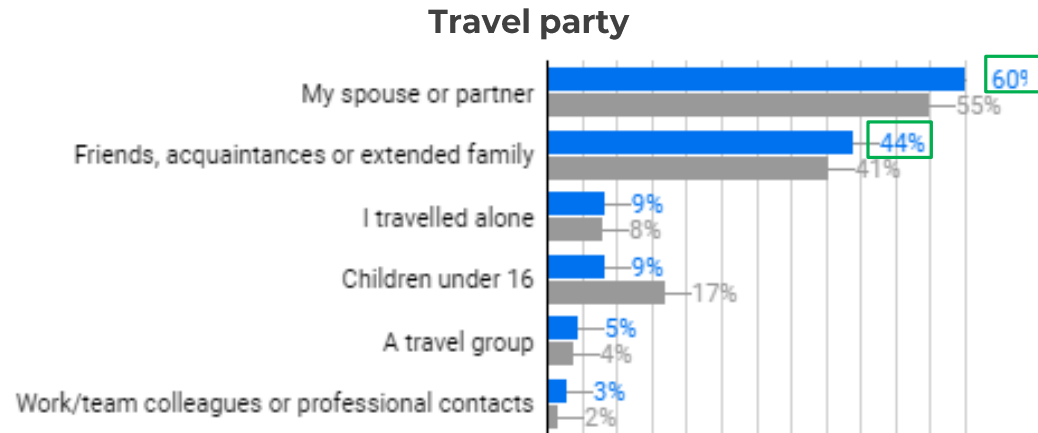
## Inbound leisure same-day visitors, 2020-2023



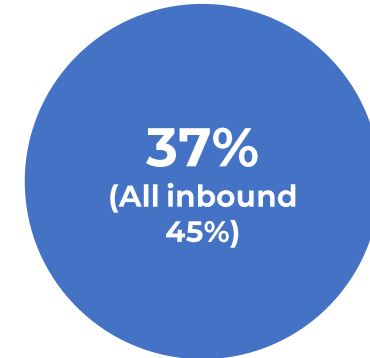
 Hiking as excursion type

 All visitors

 Significantly higher than average



### First-time visitors



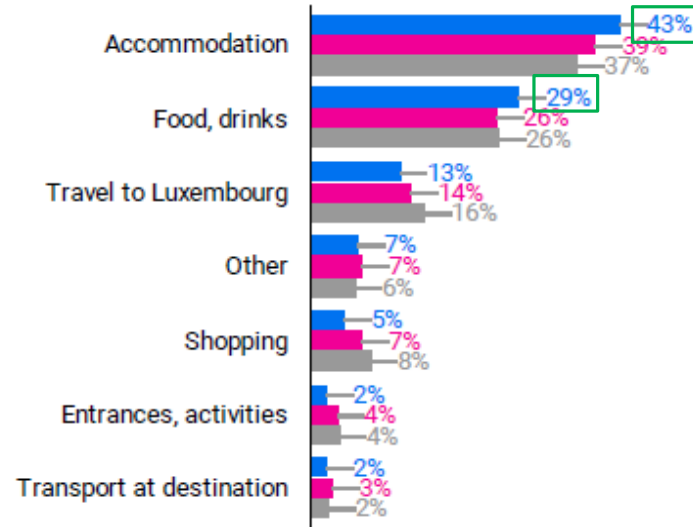


# Expenditure, length of stay and quality vs price orientation



Inbound leisure visitors with overnight, 2020-2023

## Breakdown of expenditure by categories



## Length of stay



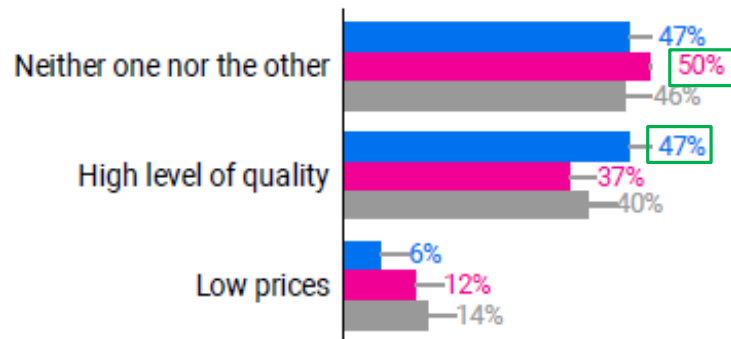
## Spend/pers./trip



## Spend/pers./day



## Quality vs. price orientation



- Hiking as main holiday type
- Hiking as additional holiday type
- All visitors
- Significantly higher than average

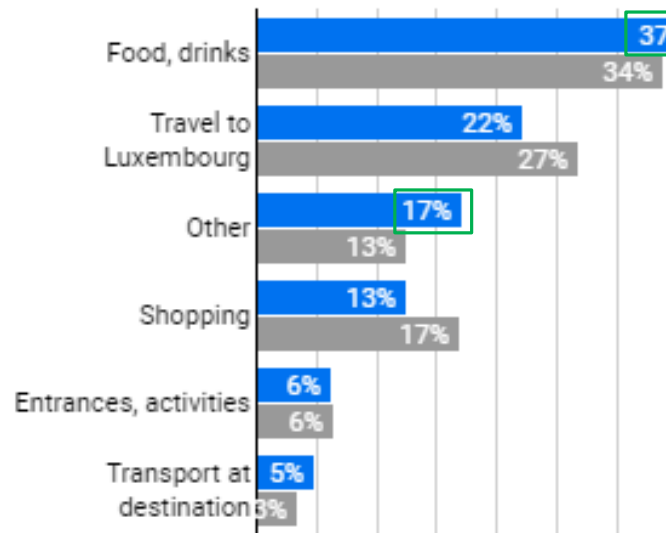
# Expenditure

## Inbound leisure same-day visitors, 2020-2023



- Hiking as excursion type
- 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

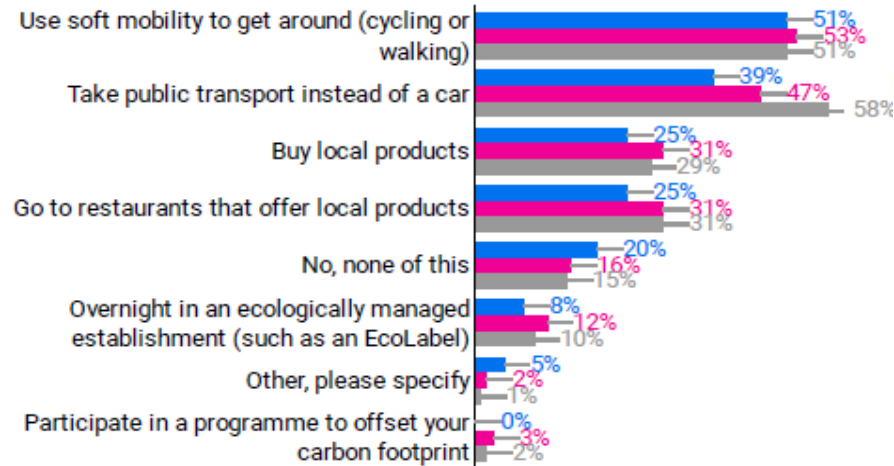


- Hiking as main holiday/excurs. type
- Hiking as additional holiday type
- All visitors

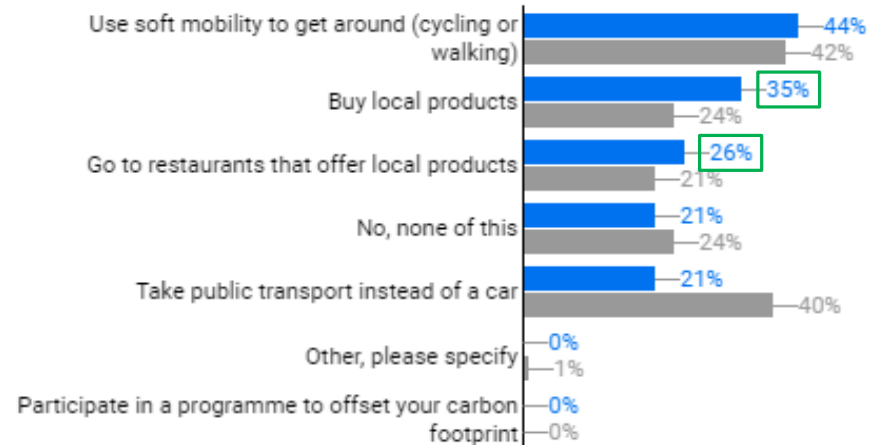
   Significantly higher than average

### Sustainable actions during stay

#### Visitors with overnight

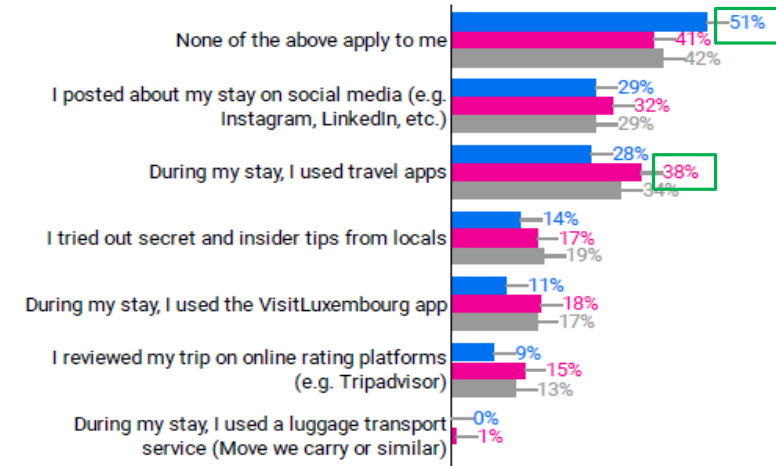


#### Day visitors

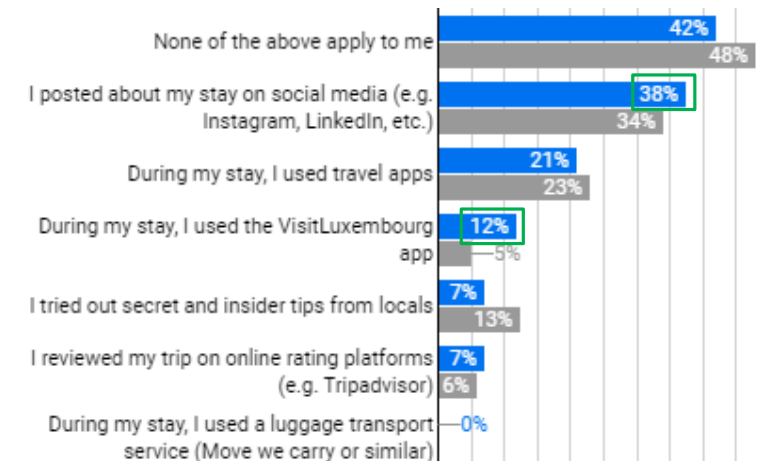


### Services used during stay

#### Visitors with overnight

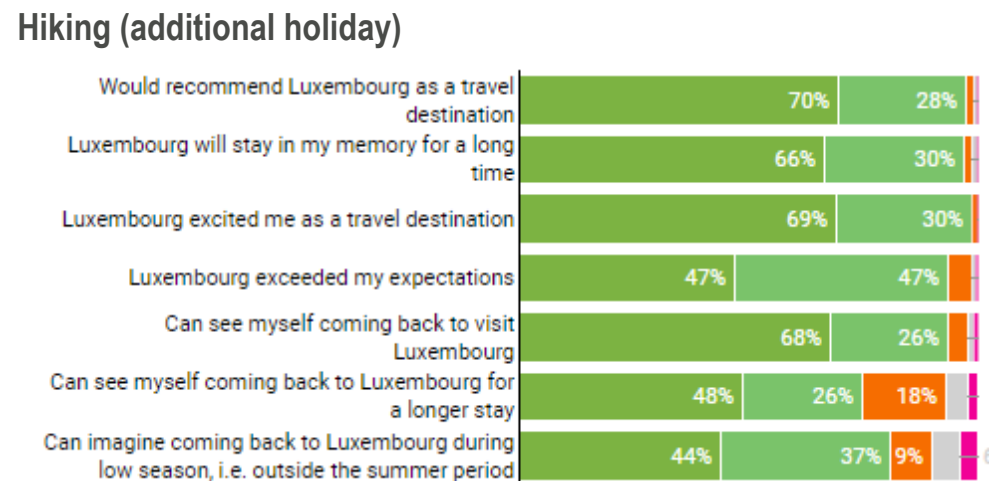
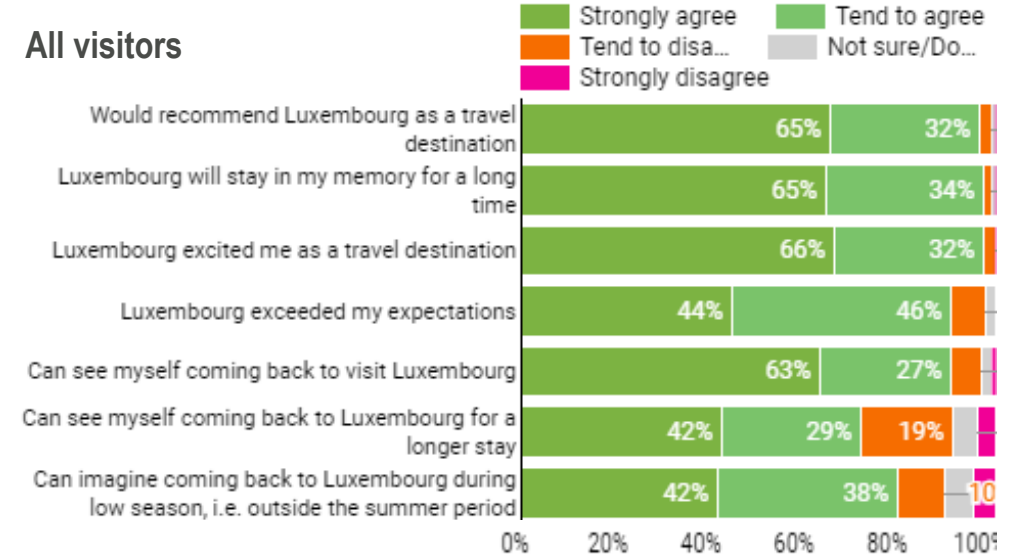
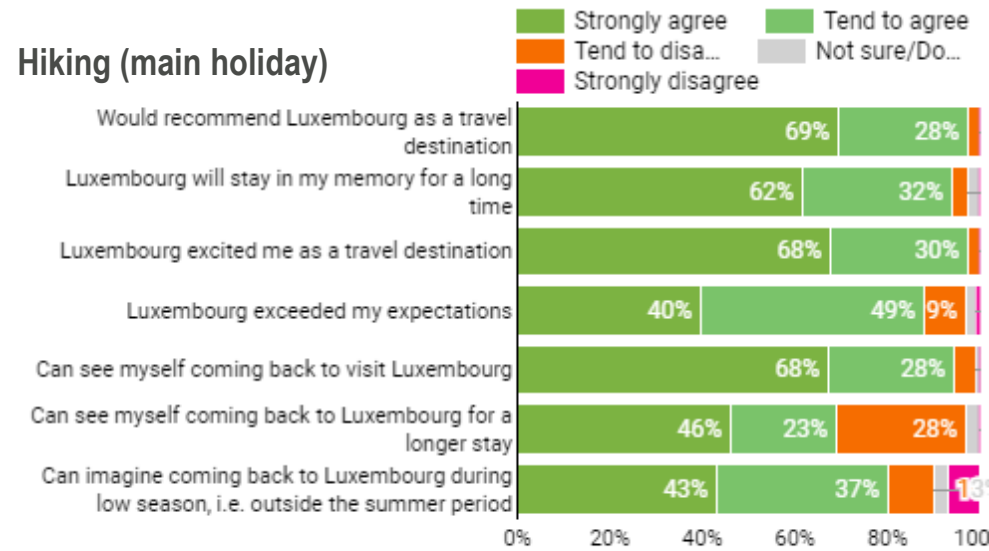


#### Day visitors



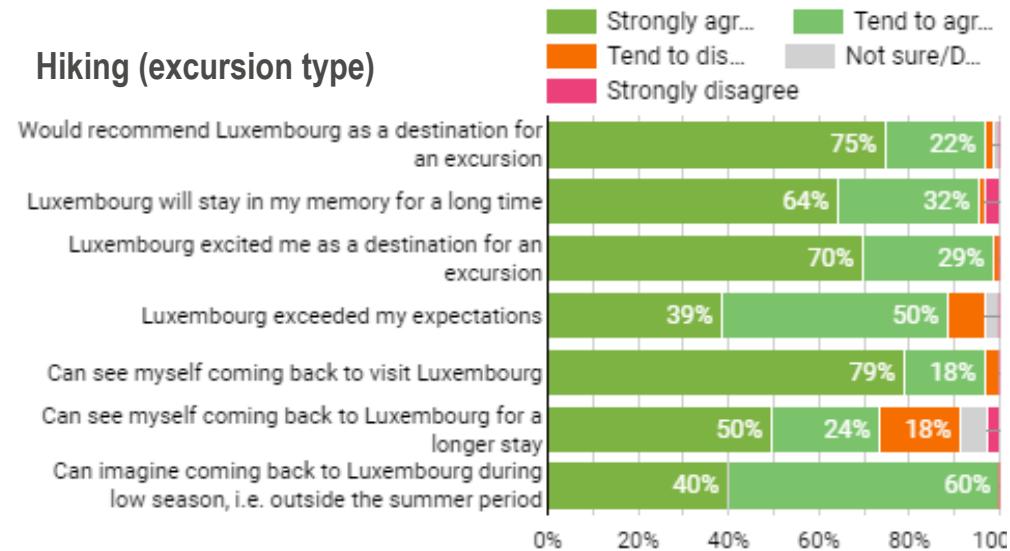
# Visitor satisfaction and recommendation

## Inbound leisure visitors with overnight, 2020-2023

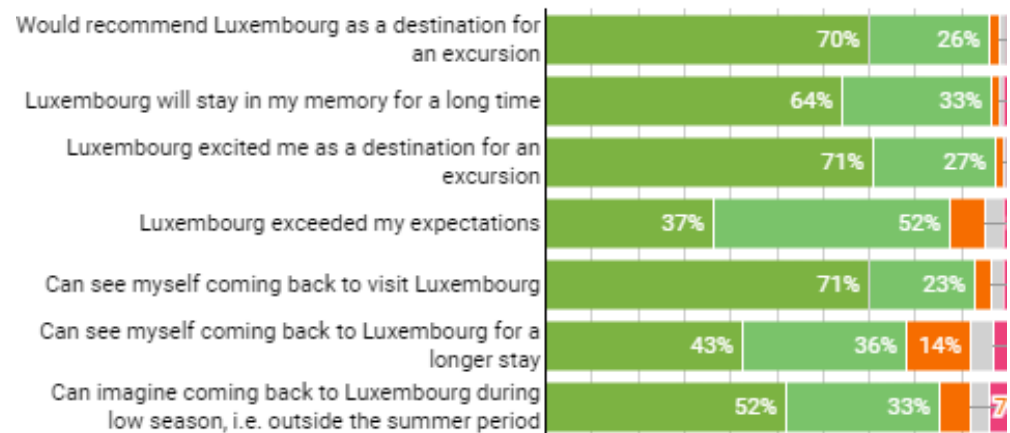


# Visitor satisfaction and recommendation

## Inbound leisure same-day visitors, 2020-2023



### All visitors

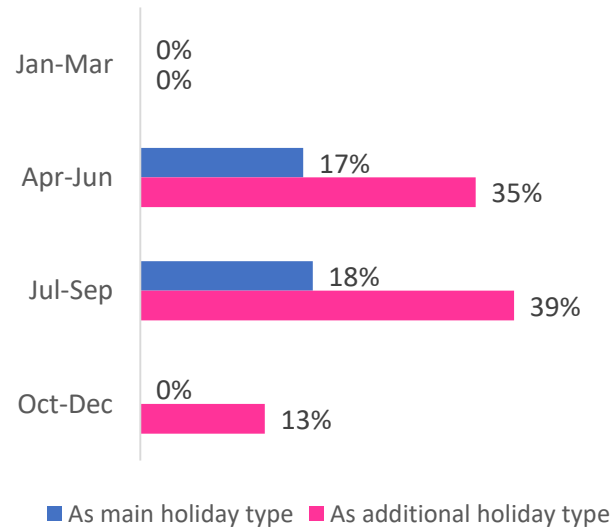


# Trip seasonality

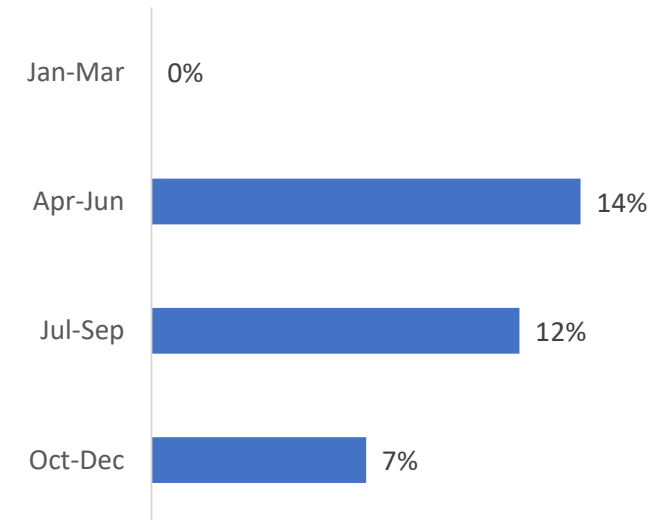
## Inbound leisure visitors, 2020-2023



### Visitors with overnight



### Day visitors





















# **Destination *Awareness* & Growth Potential for Hiking segment**

# General theme interest – Hiking











	Rank (*)	Total themes in survey	% „very interested“	% „interested“	% „interested“, Ø all themes	„Interested“, population, mn (**)
Average Europe	17	33	-	53%	54%	-
	18	33	28%	49%	52%	29,6
	9	33	38%	61%	53%	7,8
	17	33	25%	55%	54%	3,6
	17	33	27%	53%	53%	3,5
	10	33	36%	60%	51%	5,0
	17	33	26%	54%	55%	25,4
	16	33	25%	54%	53%	26,2
	8	20	21%	55%	40%	23,5
	16	20	15%	41%	44%	14,2
	7	21	28%	61%	47%	17,1
	20	24	18%	41%	54%	1,4
	14	24	24%	51%	51%	2,1
	17	24	18%	47%	52%	3,4
	13	24	30%	62%	60%	4,7

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

# Luxembourg's perceived theme competence – Hiking



	Rank (*)	Total themes in survey	% „very suitable“	% „very suitable“, Ø all themes	„very suitable“, population, mn (**)
Average Europe	11	26	25%	24%	-
	14	26	21%	23%	12,8
	2	26	52%	26%	6,6
	19	26	17%	22%	1,1
	16	26	19%	23%	1,2
	2	26	49%	25%	4,1
	15	26	18%	22%	8,5
	10	26	23%	22%	11,3
	5	15	23%	21%	9,8
	12	15	20%	25%	6,9
	6	10	24%	27%	6,7
	19	20	17%	27%	0,6
	16	20	19%	24%	0,8
	15	20	15%	21%	1,1
	12	20	29%	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.

# General theme interest vs. Luxembourg's theme competence



## – Hiking (Ø DE-NL-CH-AT-BE-FR-UK)

LFT target segments

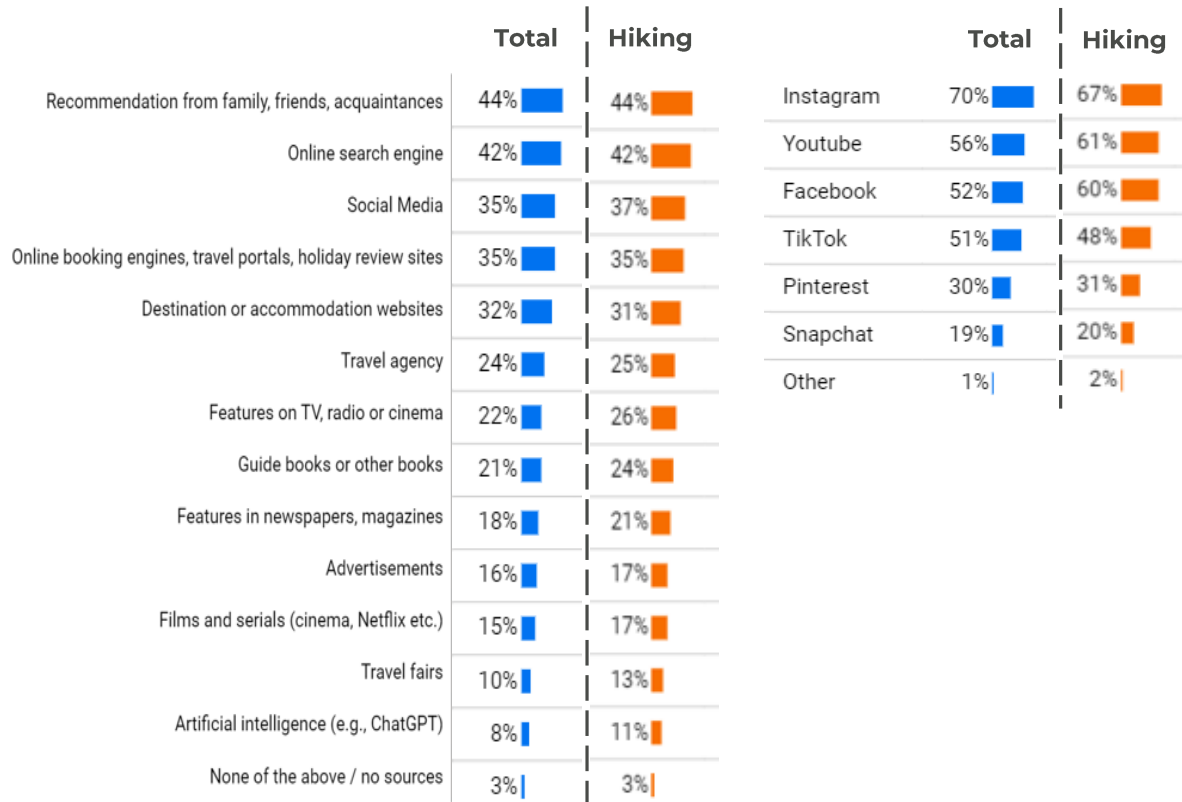
	<b>„Interested“, Rank</b>	<i>Total themes in survey</i>	<b>„Very suitable“, Rank</b>	<i>Total themes in survey</i>
<b>EXP</b>	<b>13</b>	26	<b>11</b>	26
<b>NLA</b>	<b>3</b>	26	<b>5</b>	26
<b>RS</b>	<b>17</b>	26	<b>11</b>	26
<b>SB</b>	<b>12</b>	26	<b>9</b>	26
<b>PS</b>	<b>20</b>	26	<b>13</b>	26
<b>LO</b>	<b>16</b>	26	<b>7</b>	26

# Trip organisation and preferences (1) (\*)

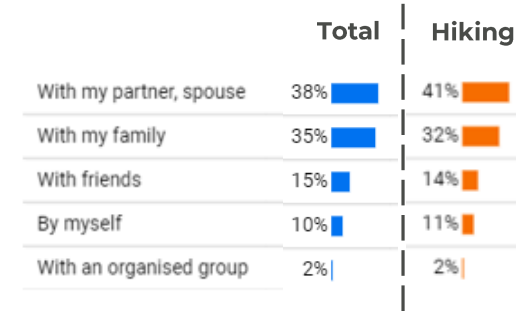
— Average **European source markets**, total vs. travellers interested in hiking



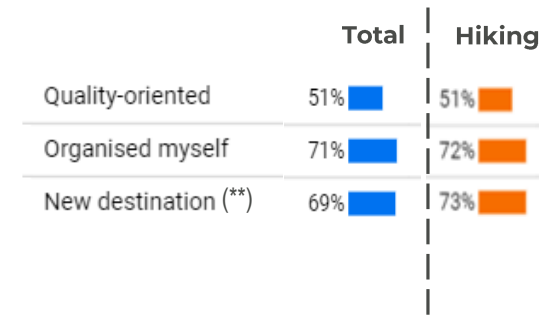
## Preferred sources of travel inspiration



## Travel party



## Quality orientation, self-organisation, new destination



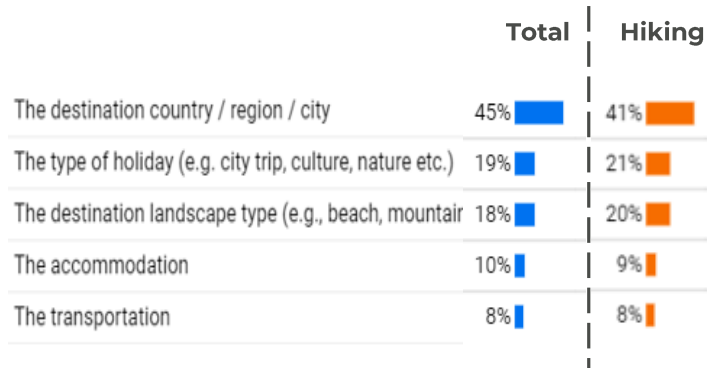
(\*) During last outbound holiday trip.  
 (\*\*) Travelled to a destination never visited before.

# Trip organisation and preferences (2) (\*)

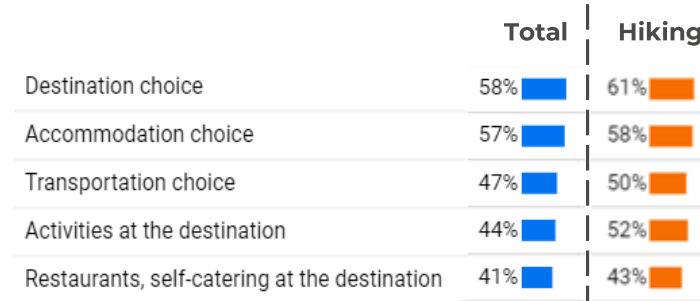
— Average **European source markets**, total vs. travellers interested in hiking



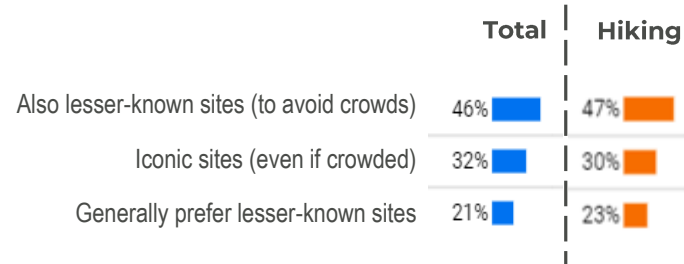
## Aspects of trip first decided



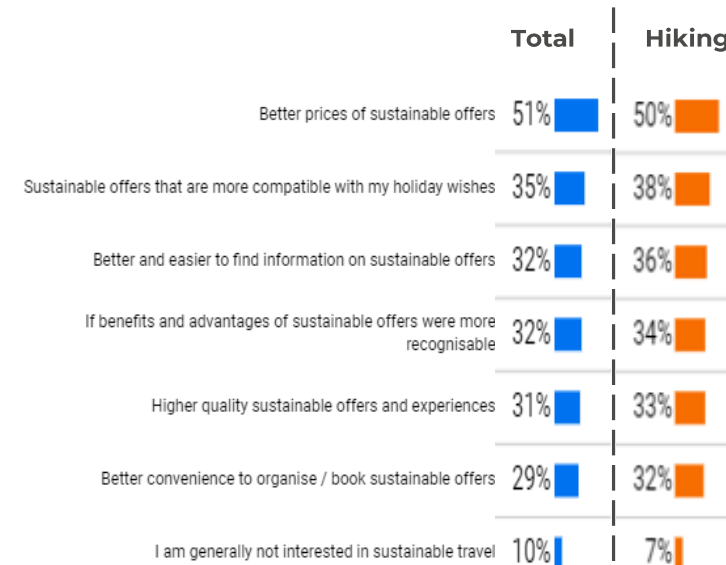
## Importance of sustainability for choice of trip components



## General preference for visiting iconic vs. lesser-known sites



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



(\*) During last outbound holiday trip.





## Your contact



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