



Luxembourg for Tourism

Theme profile

MAIN TRAVEL MOTIVES : „immersive“, „sustainable“

2023



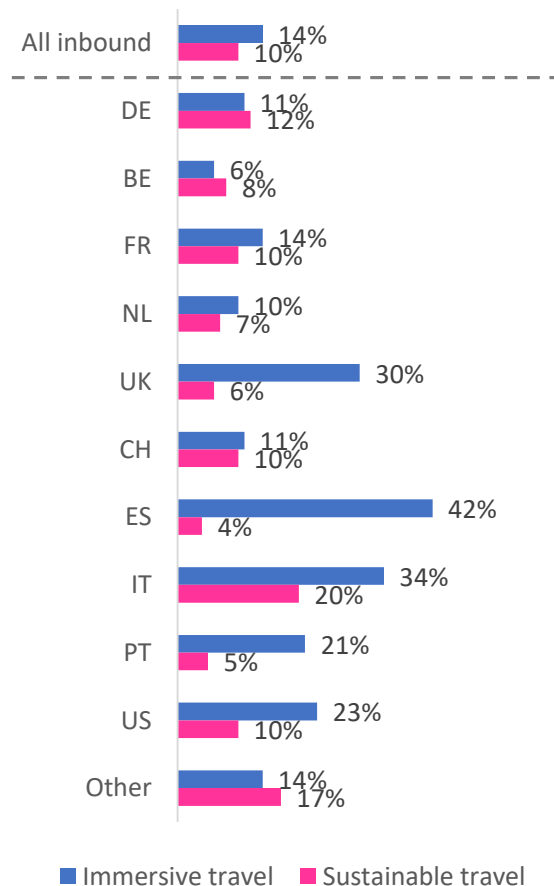
Market size of immersive and sustainable travel motives segments

Volume of leisure visitors with „immersive travel“ and „sustainable travel“ travel motives in Luxembourg

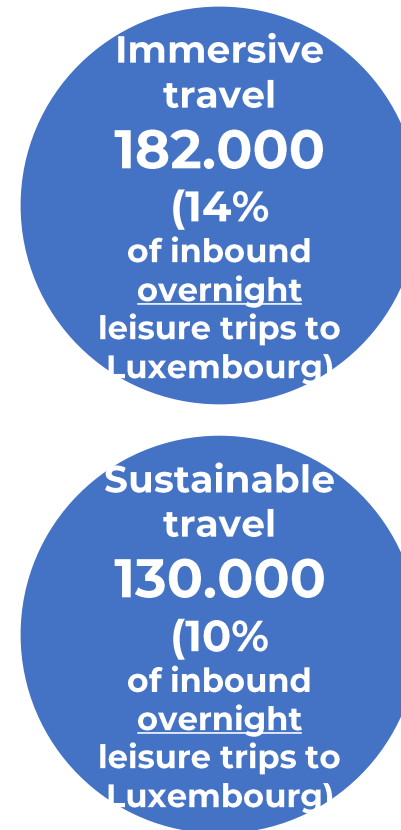
Overnight trips



Shares of leisure visitors with immersive / sustainable travel motives, by source markets



Number of overnight trips to Luxembourg (estimate 2023)



	Overnight trips: Immersive travel	Overnight trips: Sustainable travel
DE	21.000	23.000
BE	14.000	18.000
FR	18.000	13.000
NL	33.000	23.000
Other	96.000	53.000



Travel behaviour of immersive and sustainable travellers in Luxembourg

Holiday types

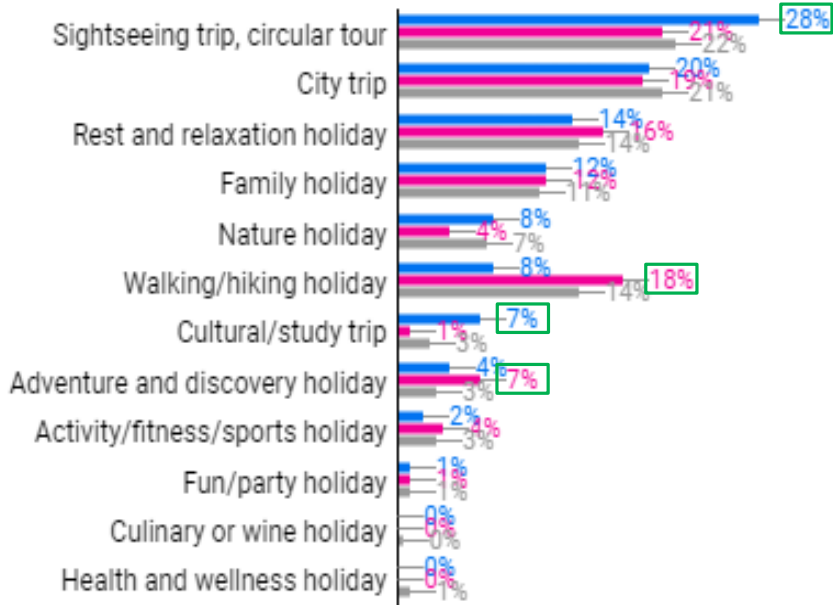
Inbound leisure visitors with overnight, 2020-2023



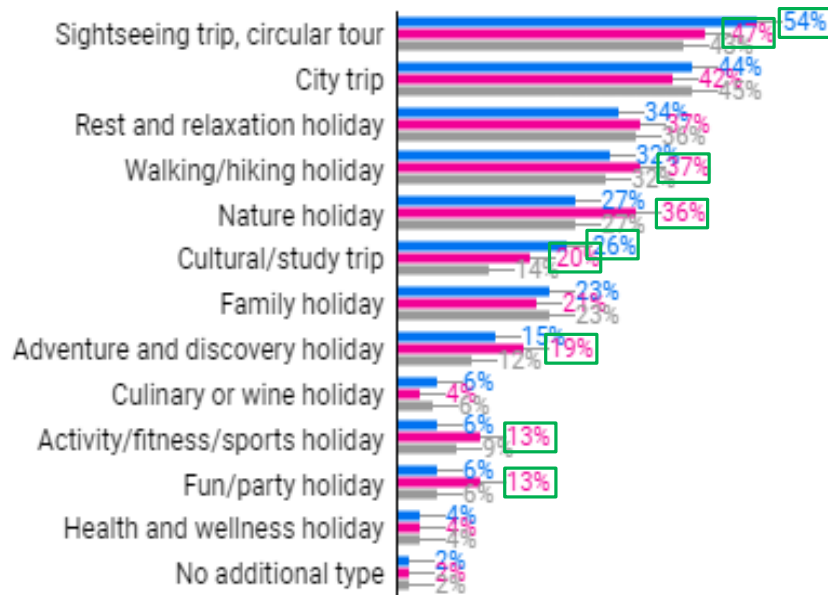
- Immersive travel motive
- Sustainable travel motive
- All visitors

 Significantly higher than average

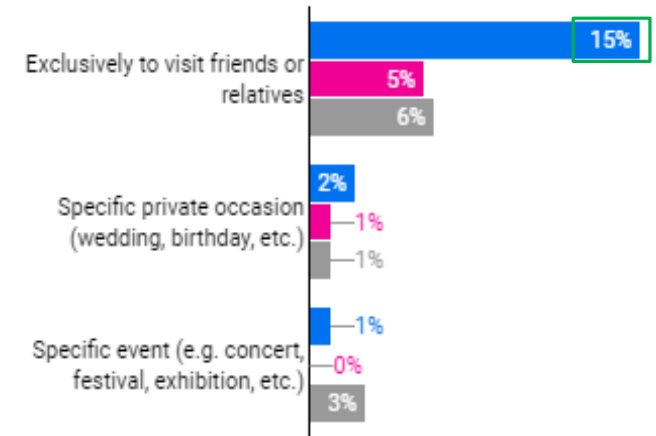
Main holiday types



Additional holiday types



Main purpose of overnight trip (if not holiday)



Key decision criteria for choosing Luxembourg (*)

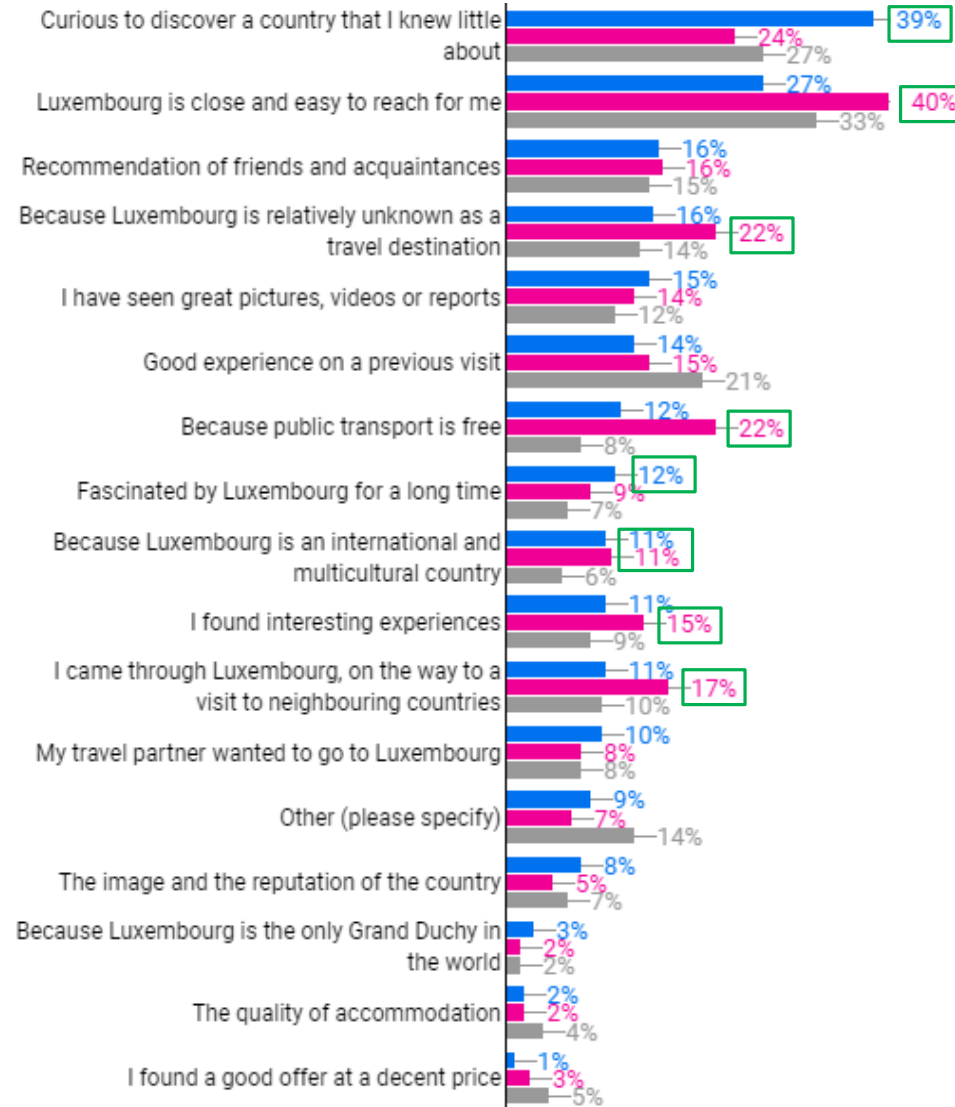
Inbound leisure visitors, 2020-2023



- Immersive travel motive
- Sustainable travel motive
- All visitors

- Significantly higher than average

Visitors with overnight



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

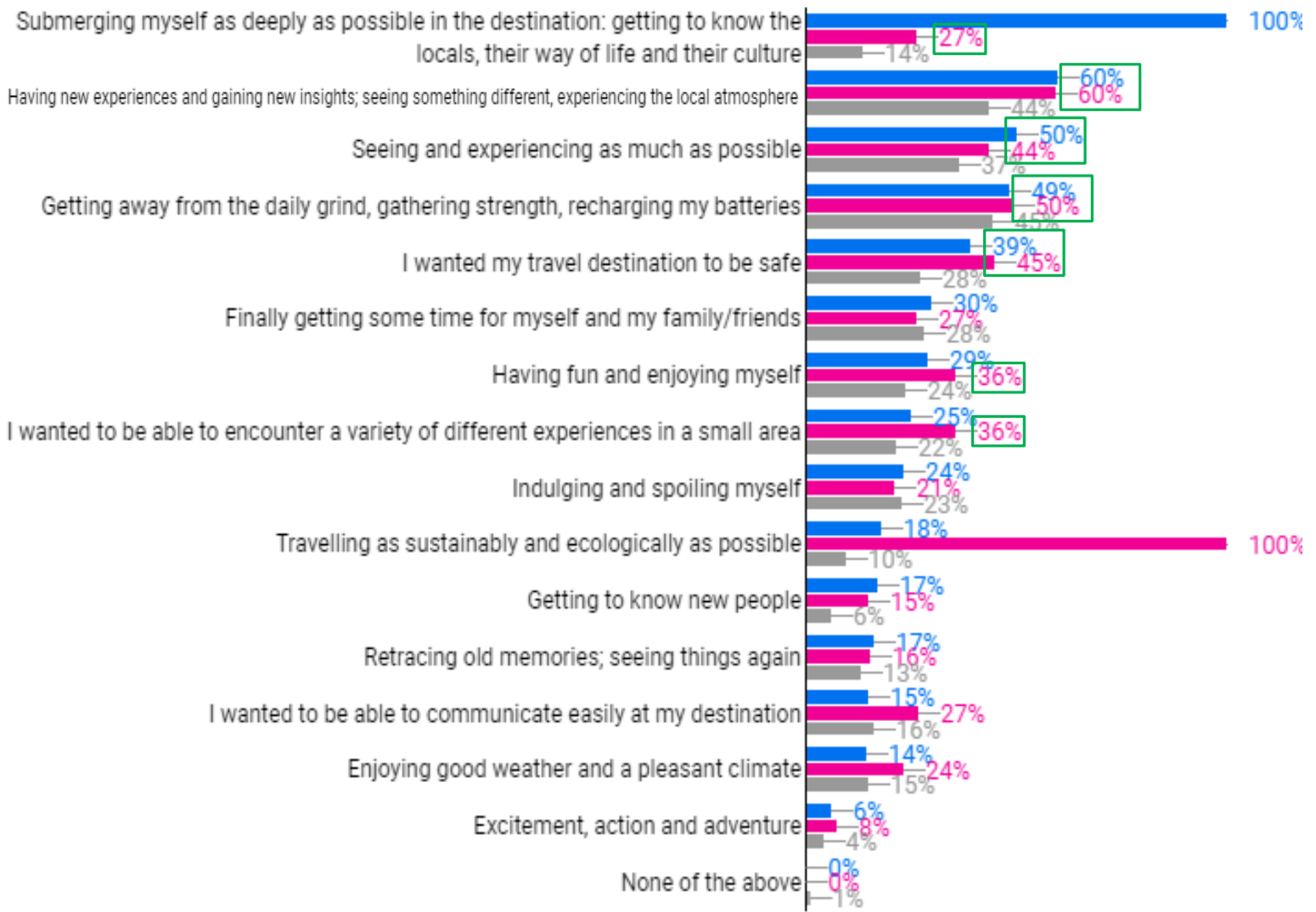
(*) Maximum 3 answers possible.

Key travel motives and emotions

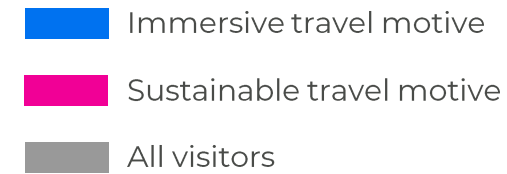
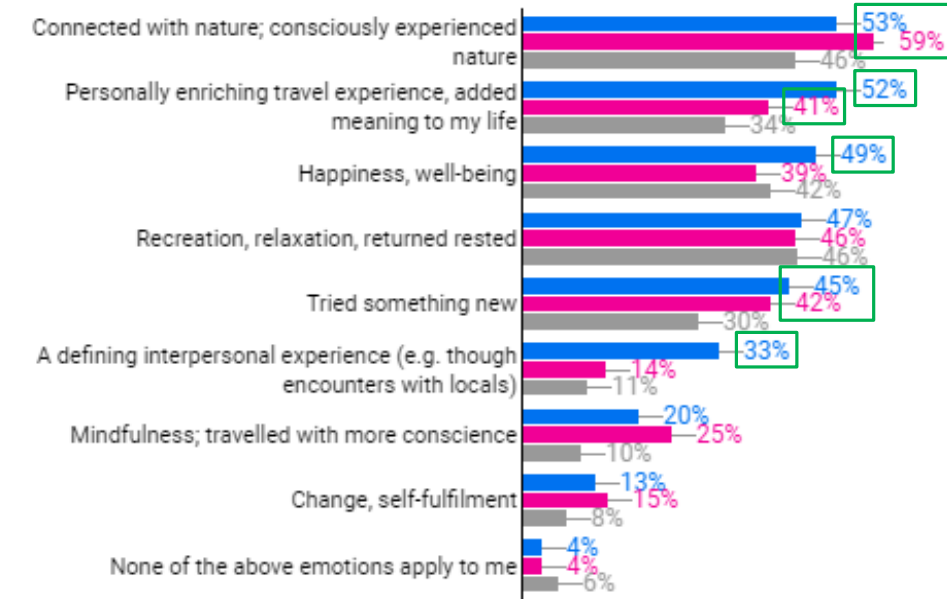
Inbound leisure visitors with overnight, 2020-2023



Travel motives



Emotions experienced during stay



Inspiration sources

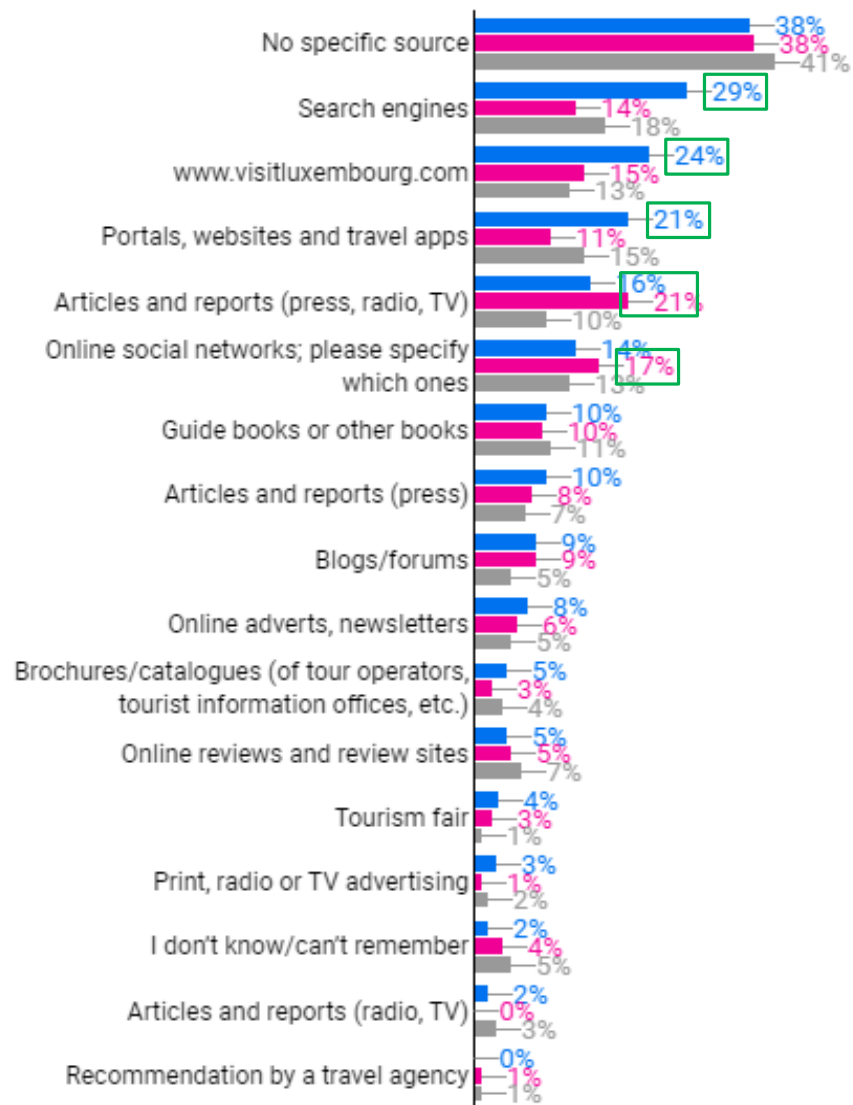
Inbound leisure visitors, 2020-2023



- Immersive travel motive
- Sustainable travel motive
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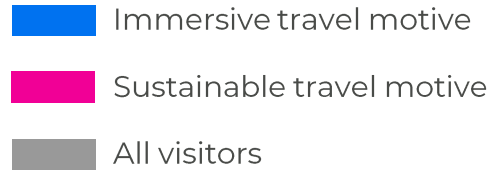
Significantly higher than average

Visitors with overnight

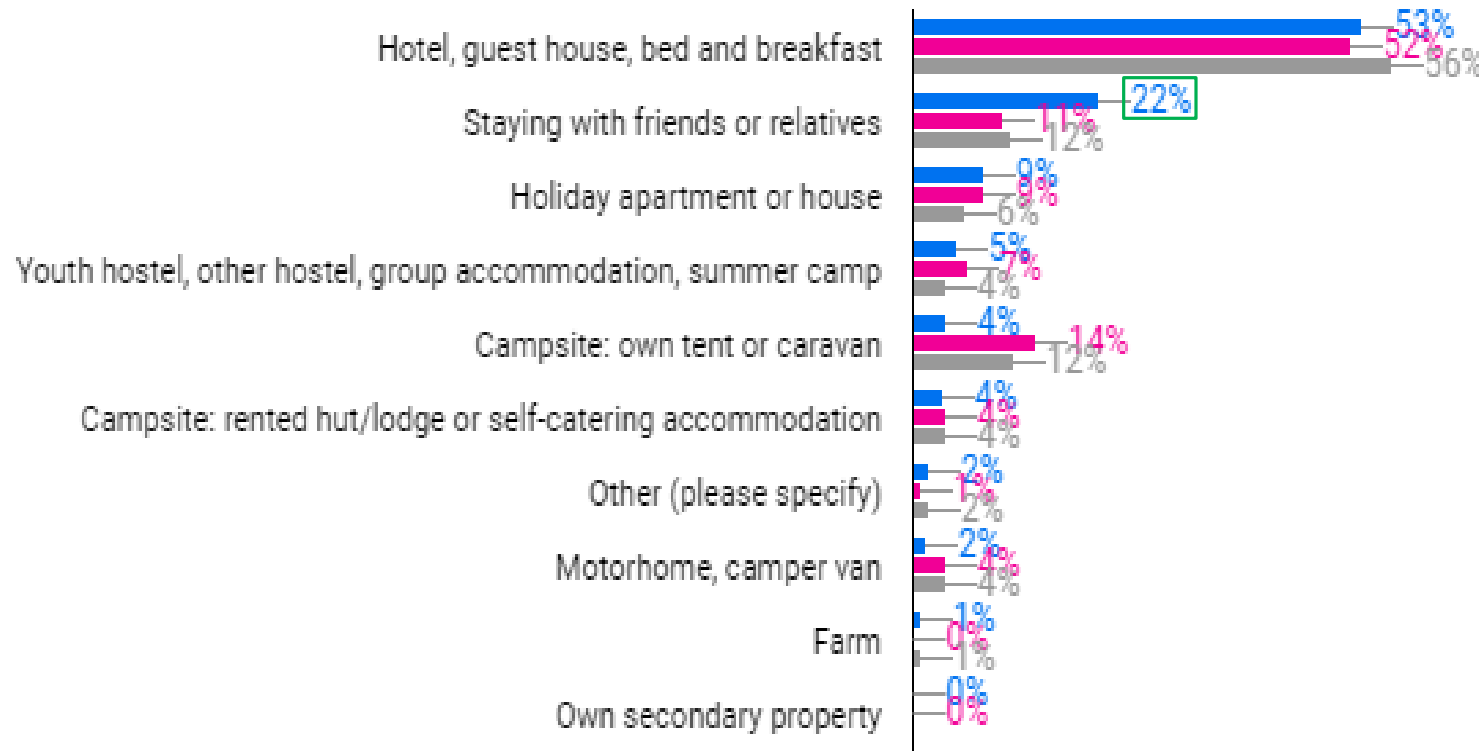


Type of accommodation, destination regions

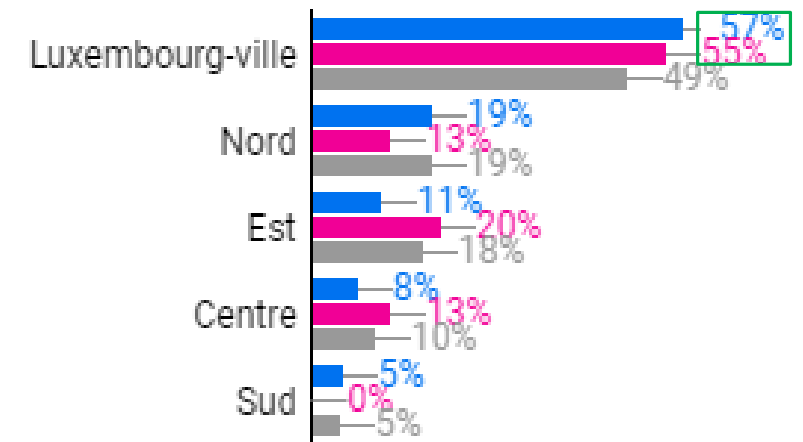
Inbound leisure visitors with overnight, 2020-2023



Type of accommodation



Destination region



 Significantly higher than average



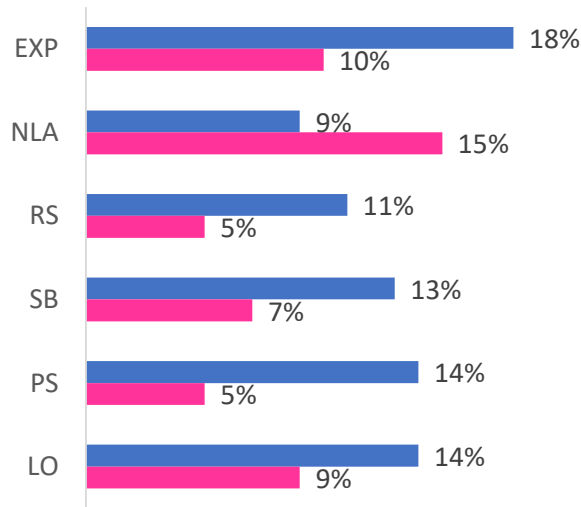
Target segments

Inbound leisure visitors, 2020-2023

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

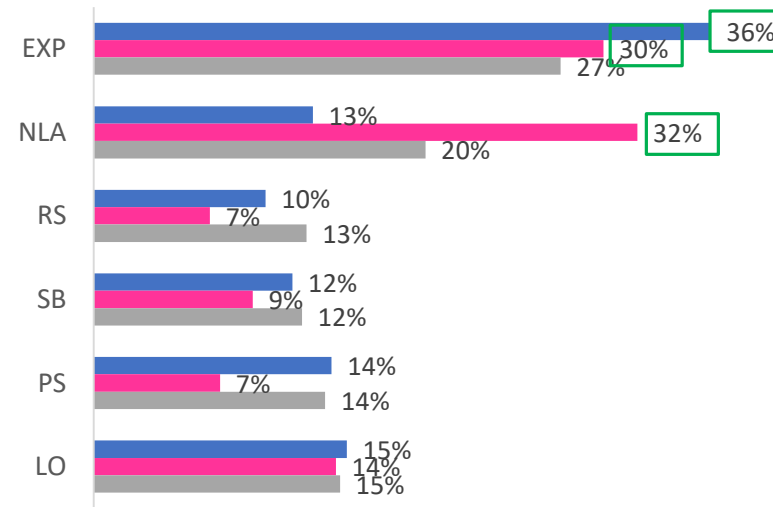
 Significantly higher than average

Visitors with overnight



■ Immersive travel ■ Sustainable travel

Reading example: 18% of Explorers have immersive travel as a main motive



■ Immersive travel ■ Sustainable travel ■ All visitors

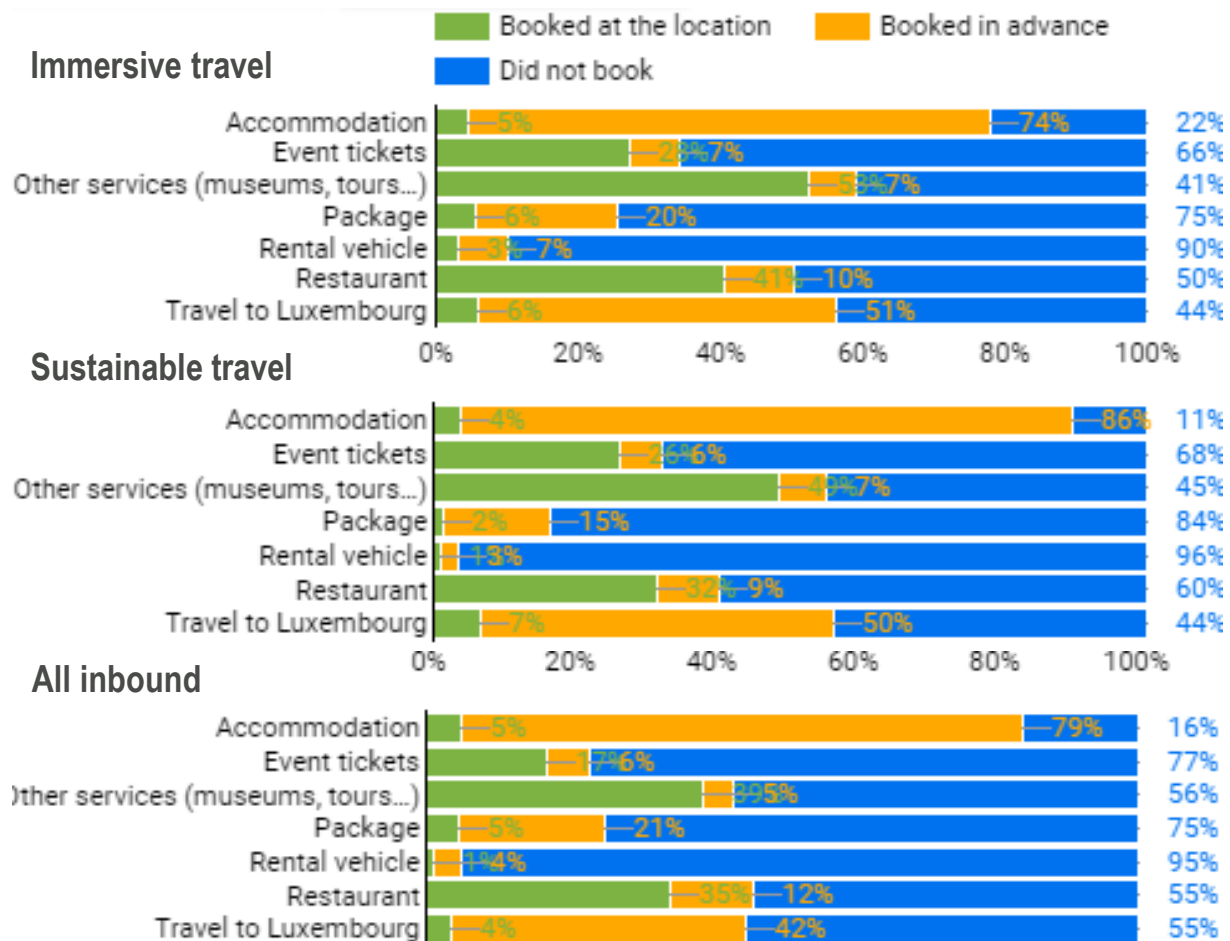
Reading example: 36% of visitors with immersive travel as a motive are Explorers

Booking behaviour

Inbound leisure visitors with overnight, 2020-2023

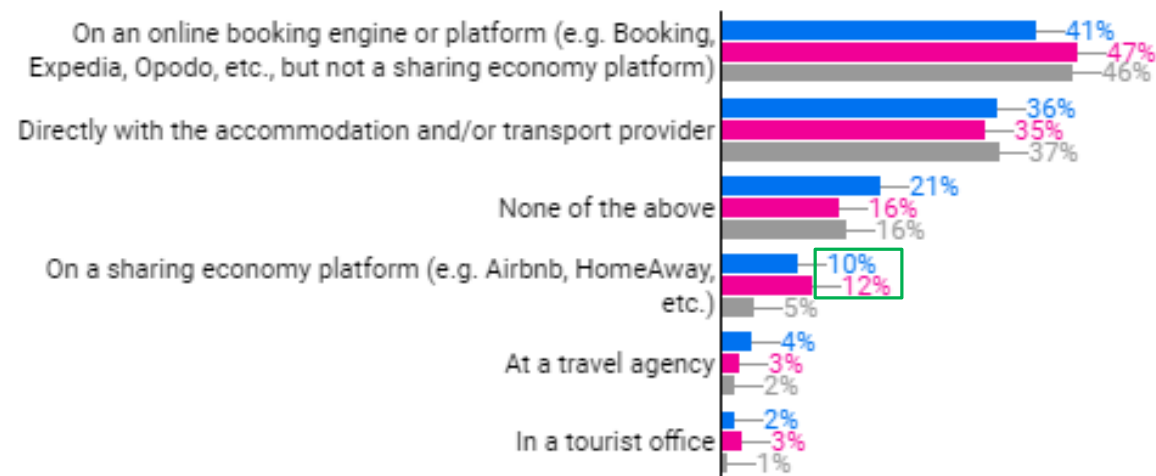


Booking of travel items



- Immersive travel motive
- Sustainable travel motive
- All visitors

Booking channels



Significantly higher than average

Places visited during leisure stays

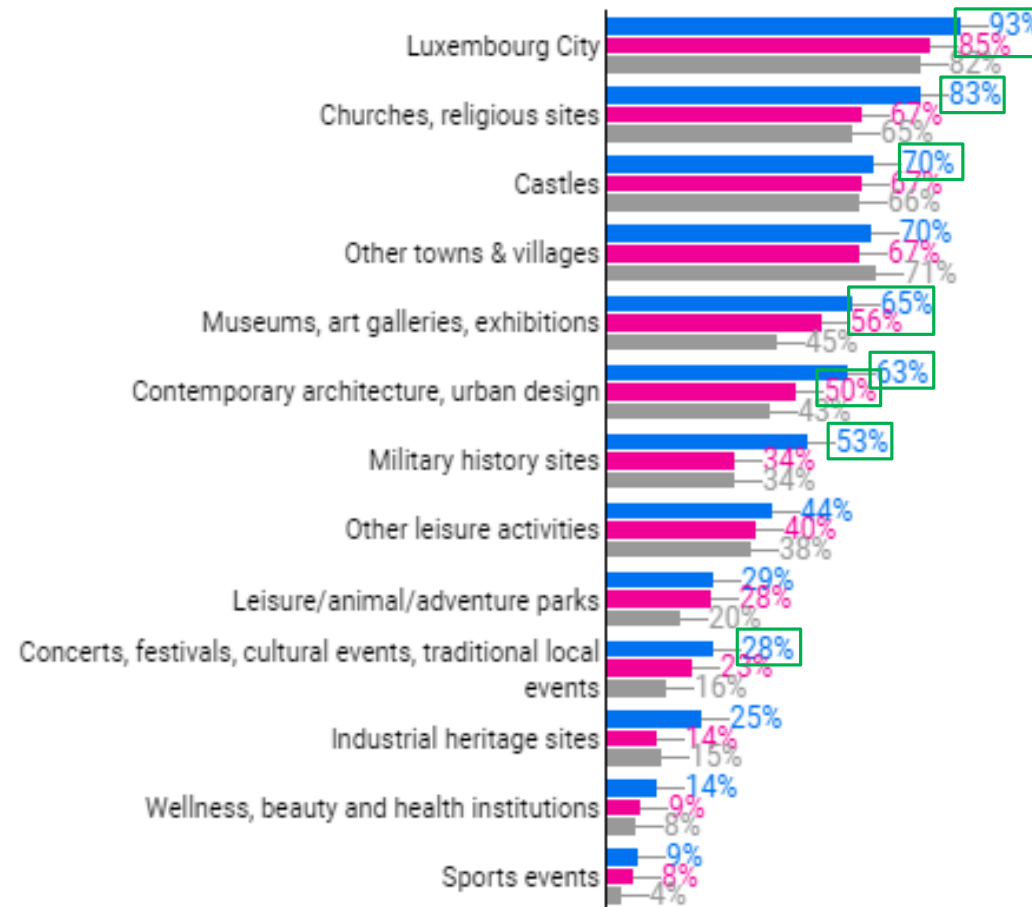
Inbound leisure visitors, 2020-2023



- Immersive travel motive
- Sustainable travel motive
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Significantly higher than average

Visitors with overnight



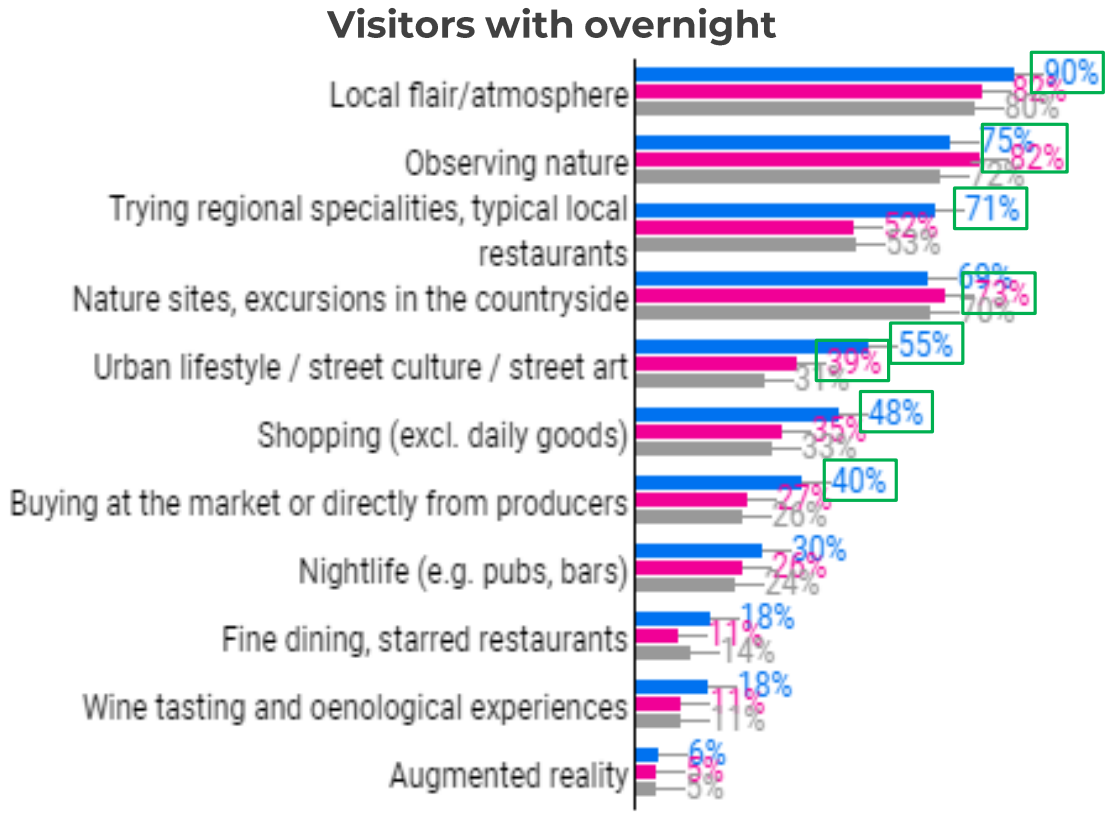
Non-sporting activities undertaken during leisure stays

Inbound leisure visitors, 2020-2023



- Immersive travel motive
- Sustainable travel motive
- All visitors

 Significantly higher than average



Sporting activities undertaken during leisure stays

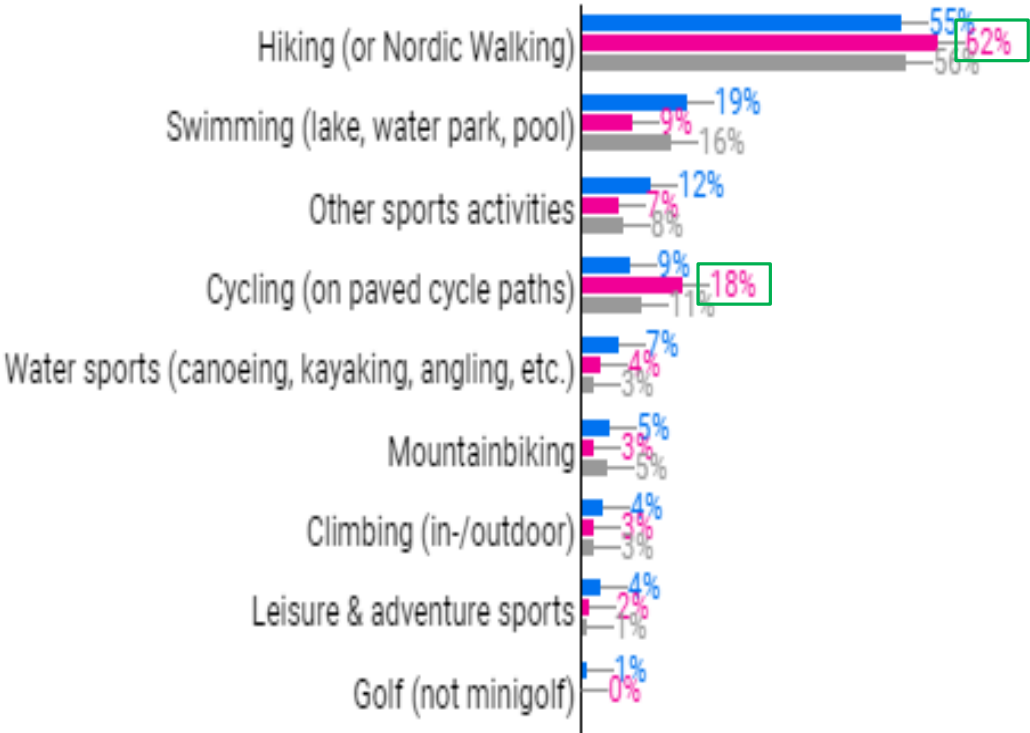
Inbound leisure visitors, 2020-2023



- Immersive travel motive
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 Significantly higher than average

Visitors with overnight

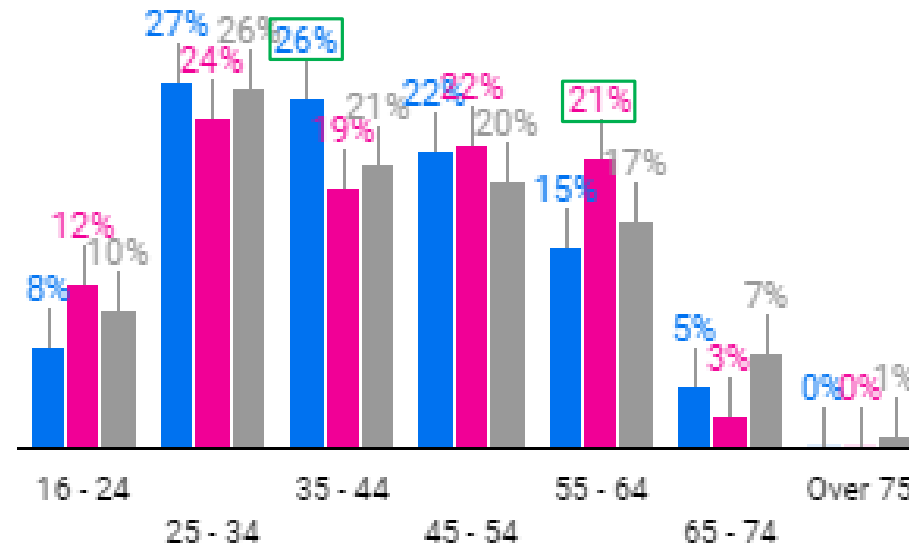




Age groups

Inbound leisure visitors, 2020-2023

- Immersive travel motive
- Sustainable travel motive
- All visitors



 Significantly higher than average

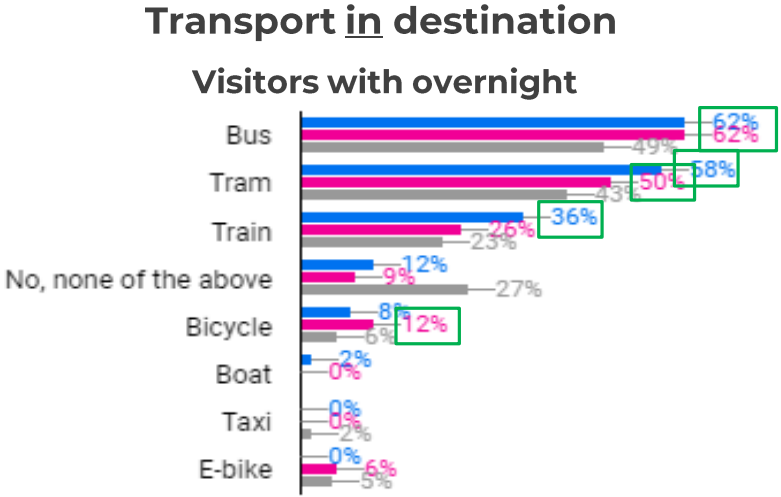
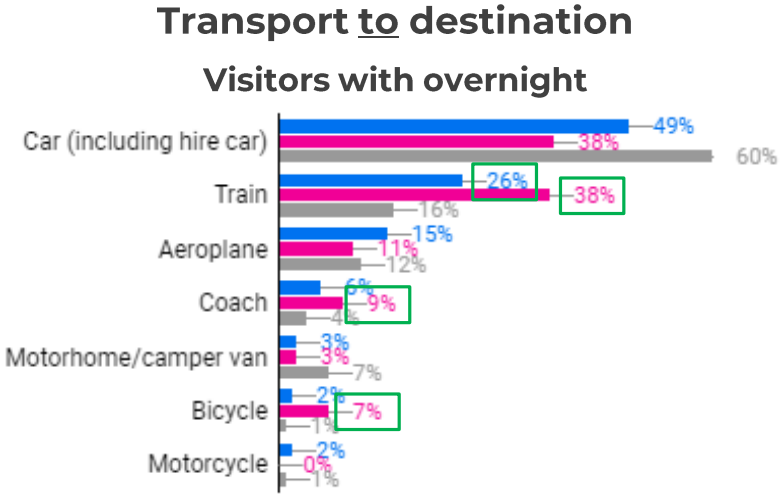
Transport (to and in destination)

Inbound leisure visitors, 2020-2023



- Immersive travel motive
- Sustainable travel motive
- All visitors

Significantly higher than average



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

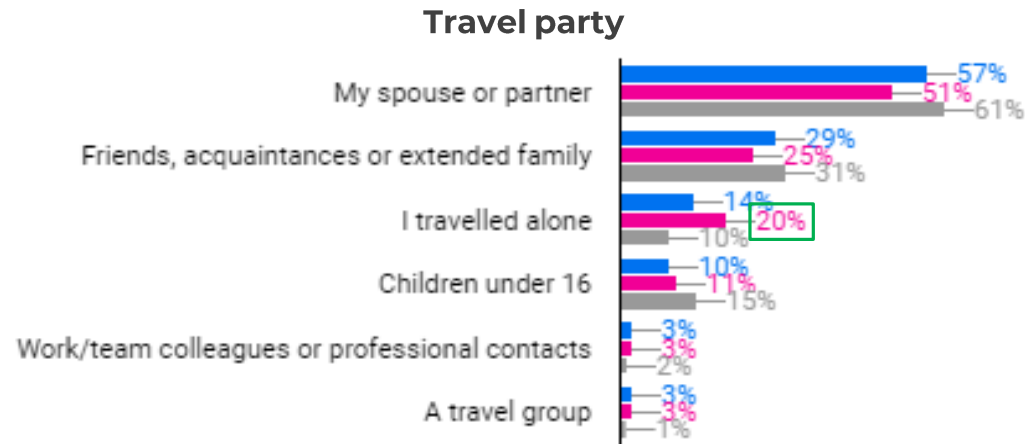
Travel party, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2020-2023

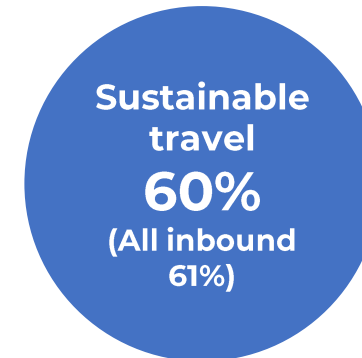
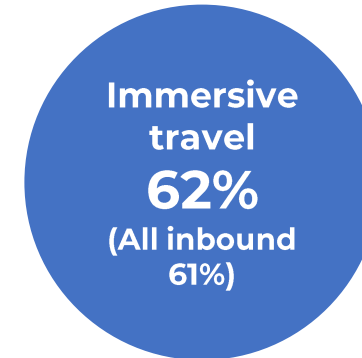


- Immersive travel motive
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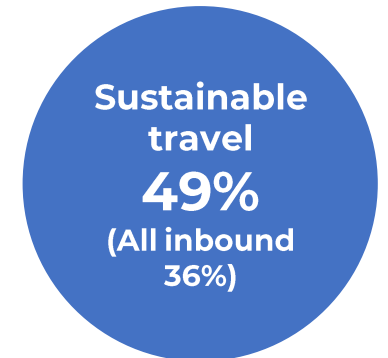
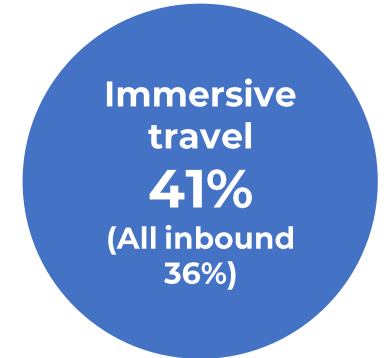
 Significantly higher than average



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

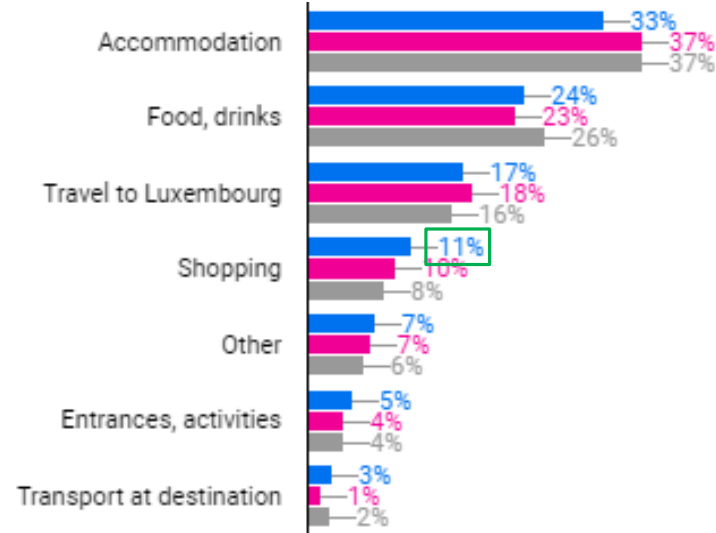


Expenditure, length of stay and quality vs price orientation

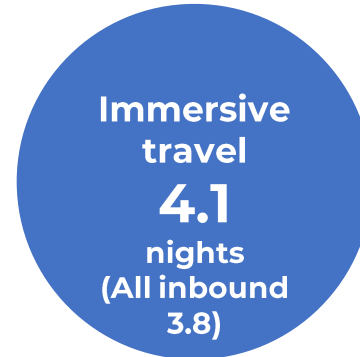


Inbound leisure visitors with overnight, 2020-2023

Breakdown of expenditure by categories



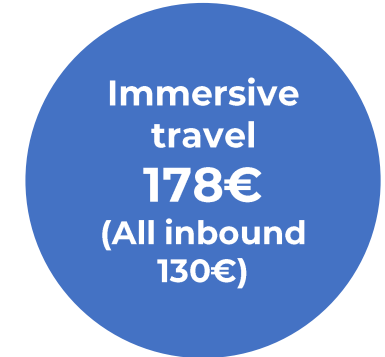
Length of stay



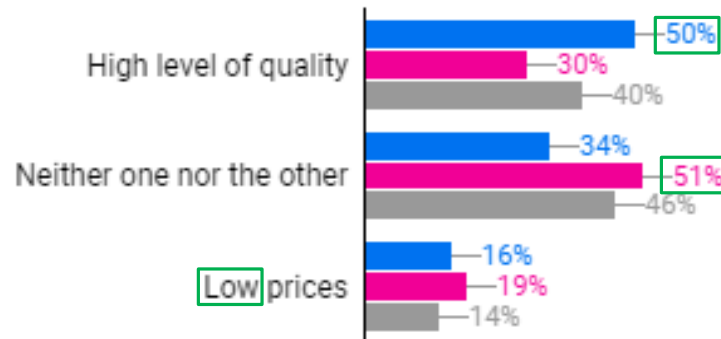
Spend/pers./trip



Spend/pers./day



Quality vs. price orientation



- Immersive travel motive
- Sustainable travel motive
- All visitors

 Significantly higher than average

Actions during stay (sustainable and services)

Inbound leisure visitors, 2020-2023

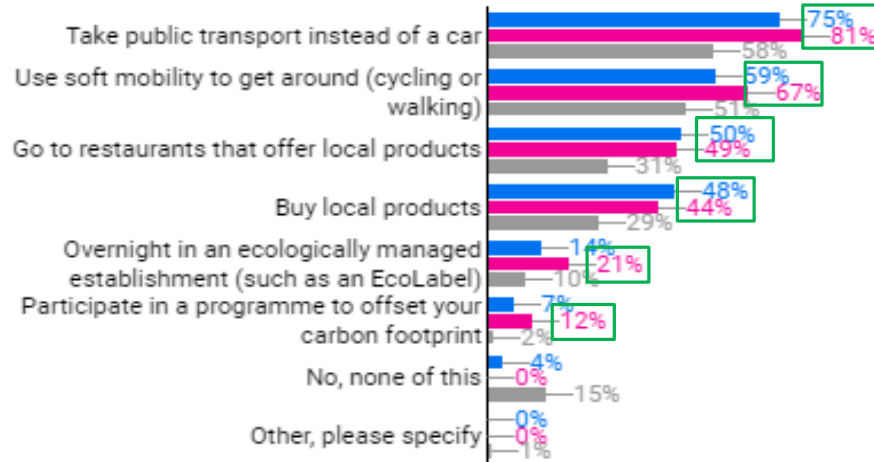


- Immersive travel motive
- Sustainable travel motive
- All visitors

 Significantly higher than average

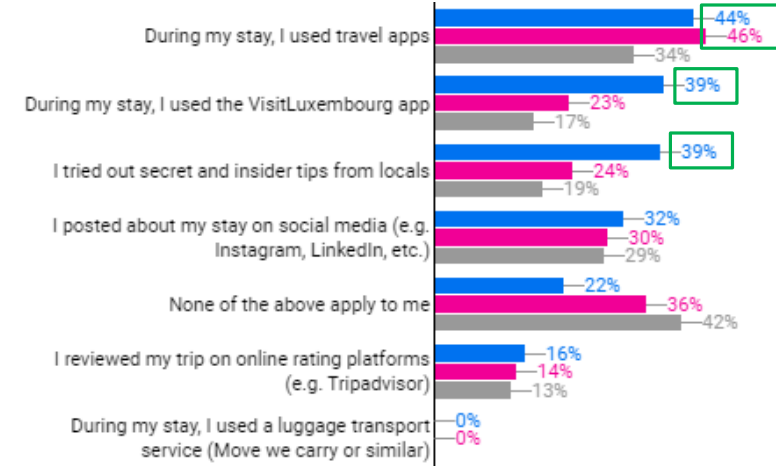
Sustainable actions during stay

Visitors with overnight



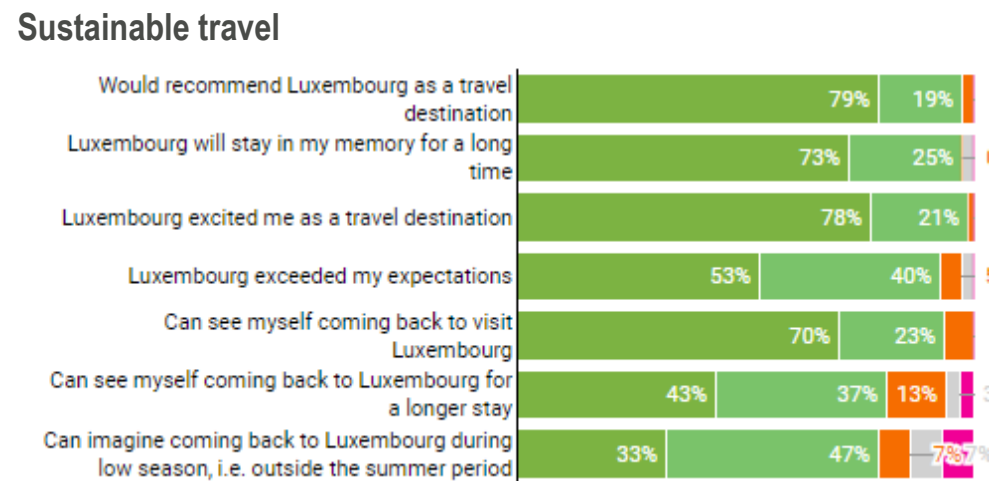
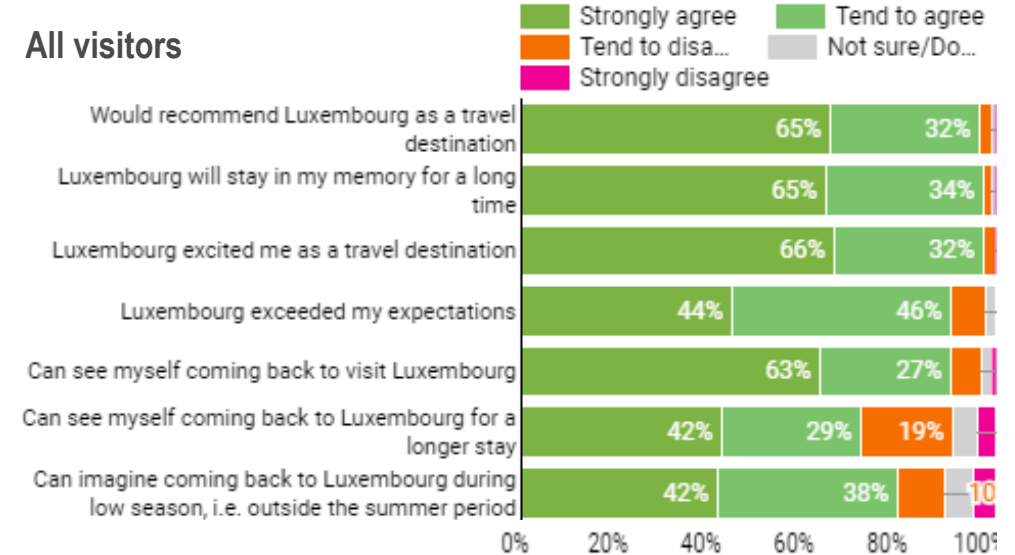
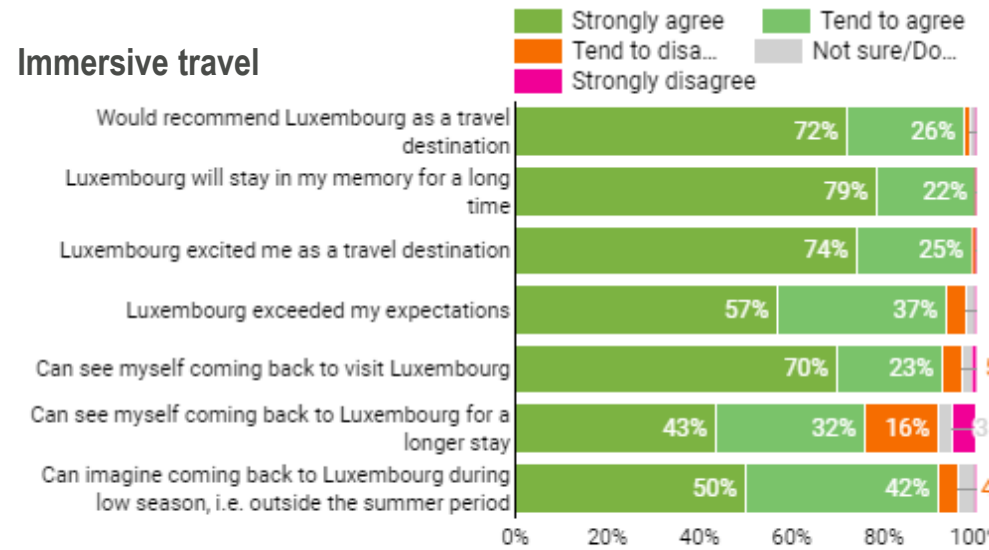
Services used during stay

Visitors with overnight



Visitor satisfaction and recommendation

Inbound leisure visitors with overnight, 2020-2023

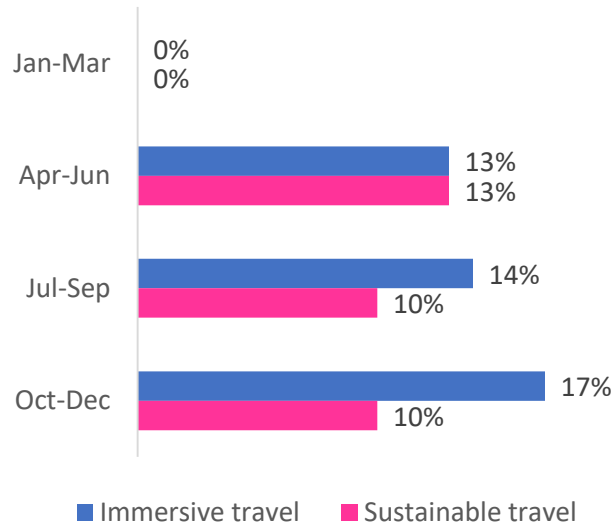


Trip seasonality

Inbound leisure visitors, 2020-2023



Visitors with overnight












**Destination Awareness &
Growth Potential for
Immersive & Sustainable travel segments**

General theme interest - Immersive travel












	Rank (*)	Total themes in survey	% „very interested“	% „interested“	% „interested“, Ø all themes	„Interested“, population, mn (**)
Average Europe	6	33	-	67%	54%	-
	4	33	40%	69%	52%	41,3
	10	33	29%	61%	53%	7,7
	4	33	38%	68%	54%	4,5
	5	33	42%	69%	53%	4,6
	8	33	28%	63%	51%	5,2
	3	33	38%	70%	55%	32,7
	6	33	32%	68%	53%	32,7

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

General theme interest - Sustainable travel











	Rank (*)	Total themes in survey	% „very interested“	% „interested“	% „interested“, Ø all themes	„Interested“, population, mn (**)
Average Europe	15	33	-	56%	54%	-
	16	33	24%	53%	52%	31,7
	18	33	21%	50%	53%	6,3
	18	33	22%	55%	54%	3,6
	16	33	23%	55%	53%	3,6
	16	33	18%	54%	51%	4,4
	14	33	24%	61%	55%	28,6
	14	33	24%	56%	53%	26,9
	9	20	-	52%	40%	22,2
	9	20	-	53%	44%	18,3
	10	21	-	51%	47%	14,3
	6	24	35%	65%	54%	2,3
	12	24	22%	51%	51%	2,1
	5	24	24%	63%	52%	4,5
	8	24	47%	72%	60%	5,4

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

Luxembourg's perceived theme competence – Sustainable travel



	Rank (*)	Total themes in survey	% „very suitable“	% „very suitable“, Ø all themes	„very suitable“, population, mn (**)
Average Europe	18	26	19%	24%	-
	18	26	18%	23%	10,6
	21	26	16%	26%	2,1
	23	26	15%	22%	1,0
	20	26	18%	23%	1,2
	21	26	18%	25%	1,5
	20	26	16%	22%	7,4
	21	26	15%	22%	7,4
	13	20	23%	27%	0,8
	14	20	20%	24%	0,8
	13	20	18%	21%	1,3
	10	20	33%	33%	2,5

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



– Sustainable travel (Ø DE-NL-CH-AT-BE-FR-UK)

LFT target segments

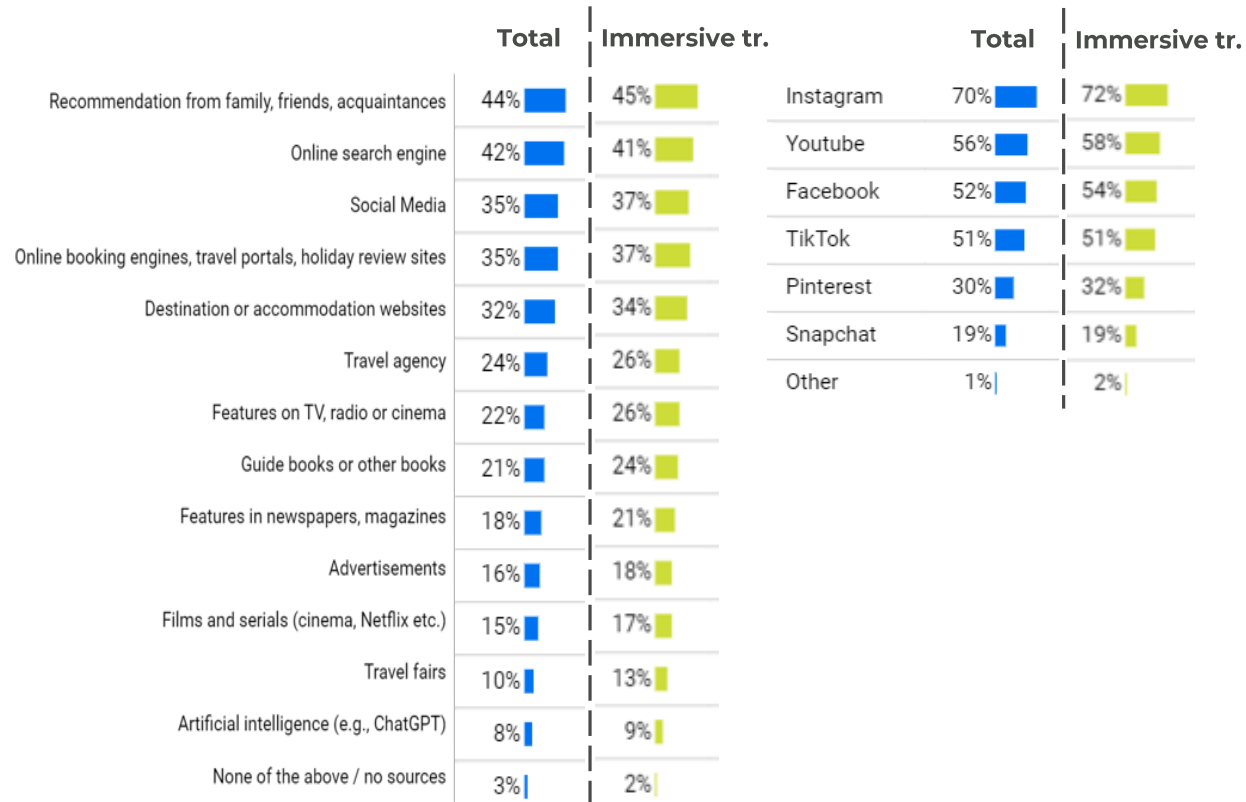
	„Interested“, Rank	<i>Total themes in survey</i>	„Very suitable“, Rank	<i>Total themes in survey</i>
EXP	11	26	17	26
NLA	7	26	19	26
RS	10	26	18	26
SB	11	26	20	26
PS	11	26	14	26
LO	10	26	19	26

Trip organisation and preferences (1) (*)

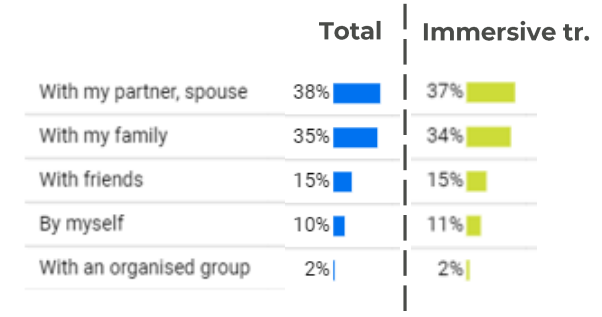
— Average **European source markets**, total vs. travellers interested in immersive travel



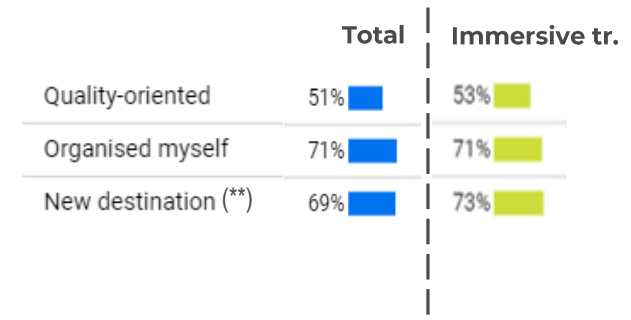
Preferred sources of travel inspiration



Travel party



Quality orientation, self-organisation, new destination



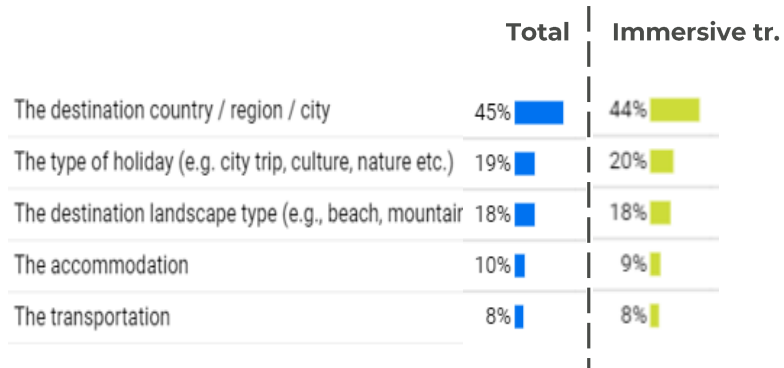
(*) During last outbound holiday trip.
 (**) Travelled to a destination never visited before.

Trip organisation and preferences (2) (*)

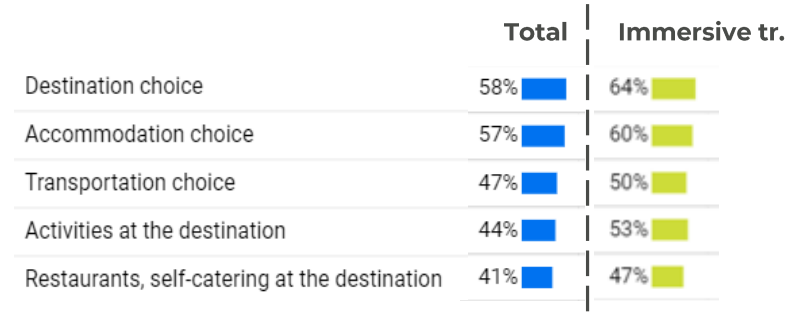
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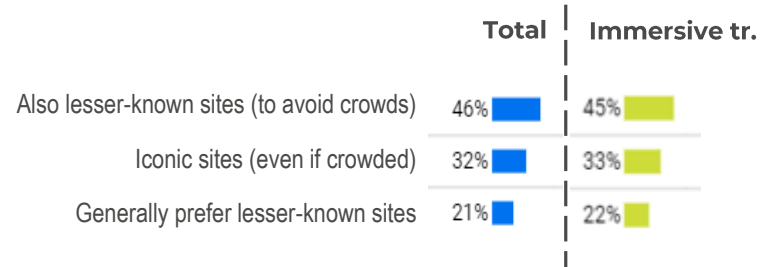
Aspects of trip first decided



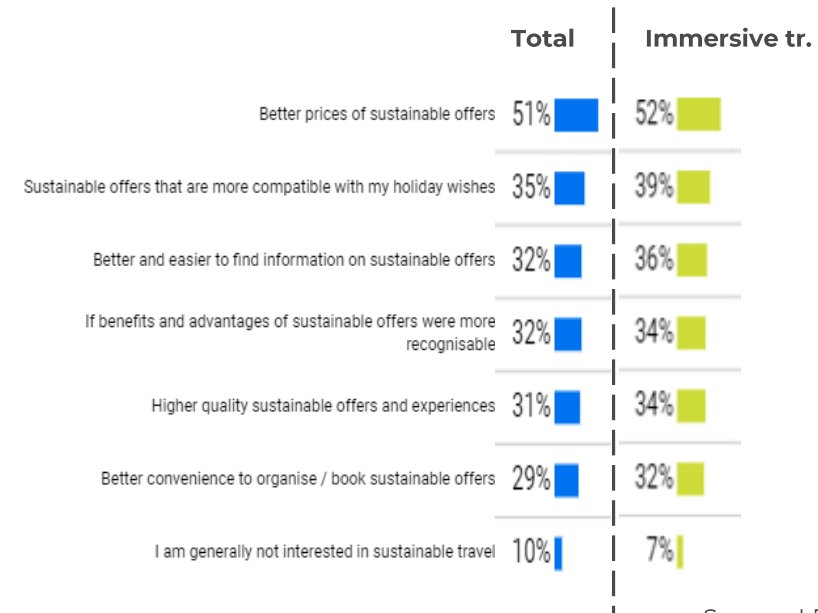
Importance of sustainability for choice of trip components



General preference for visiting iconic vs. lesser-known sites



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



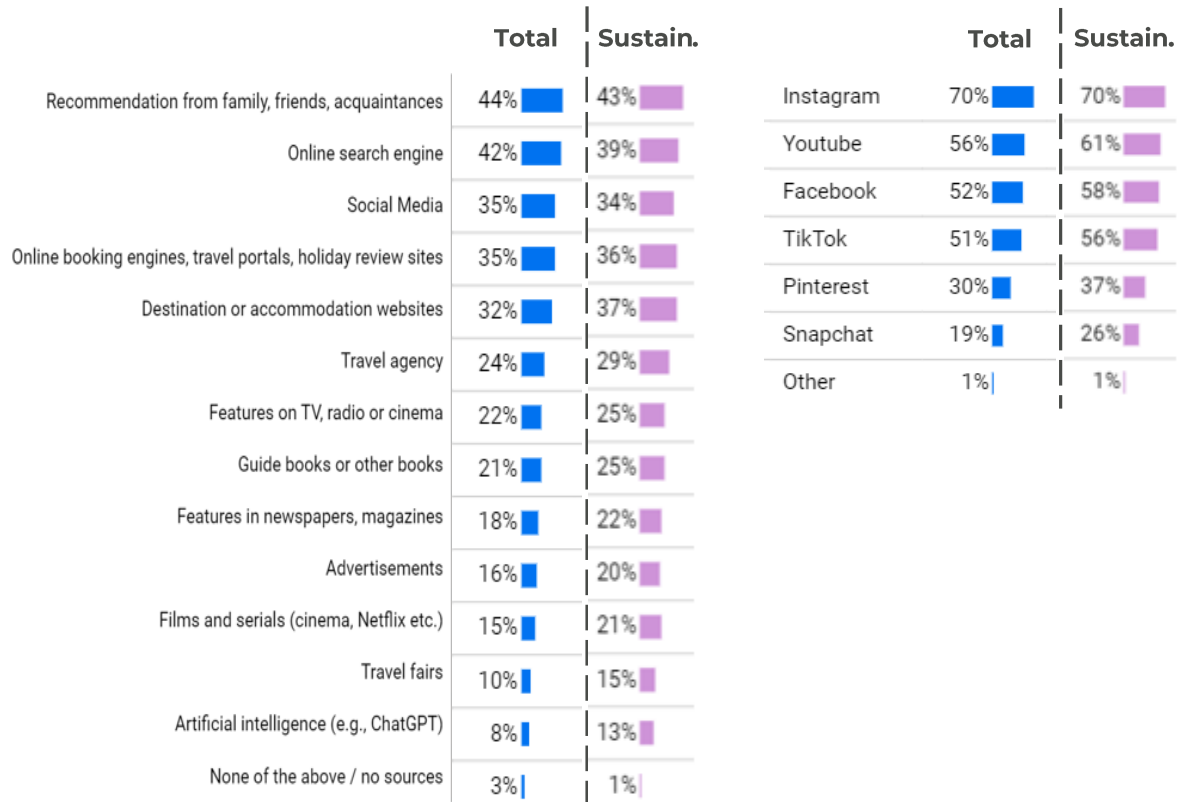
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Trip organisation and preferences (1) (*)

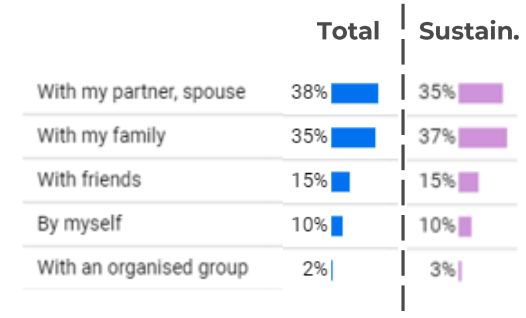
— Average **European source markets**, total vs. travellers interested in sustainable travel



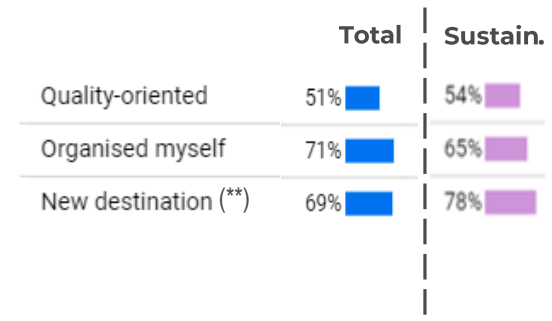
Preferred sources of travel inspiration



Travel party



Quality orientation, self-organisation, new destination



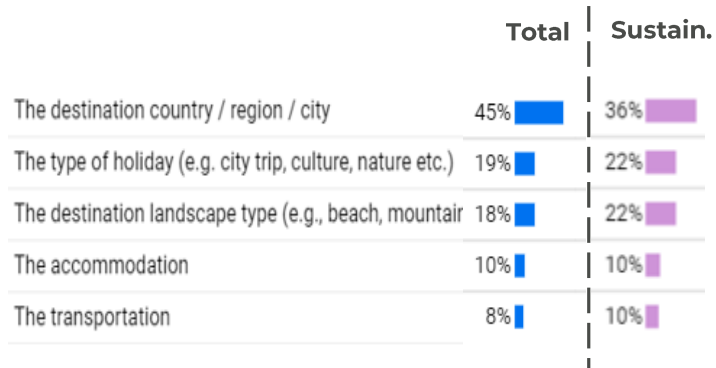
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Trip organisation and preferences (2) (*)

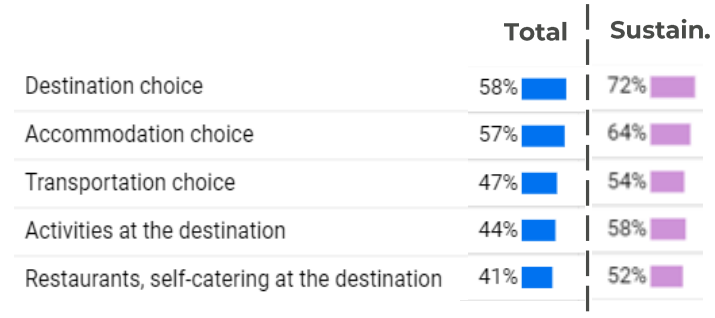
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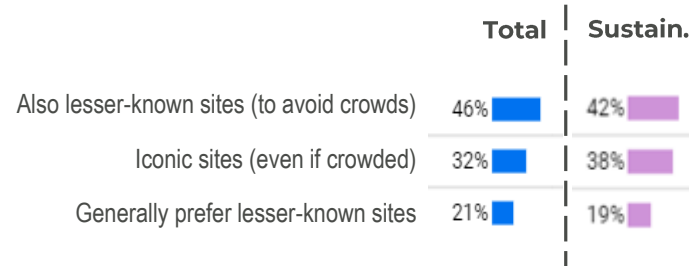
Aspects of trip first decided



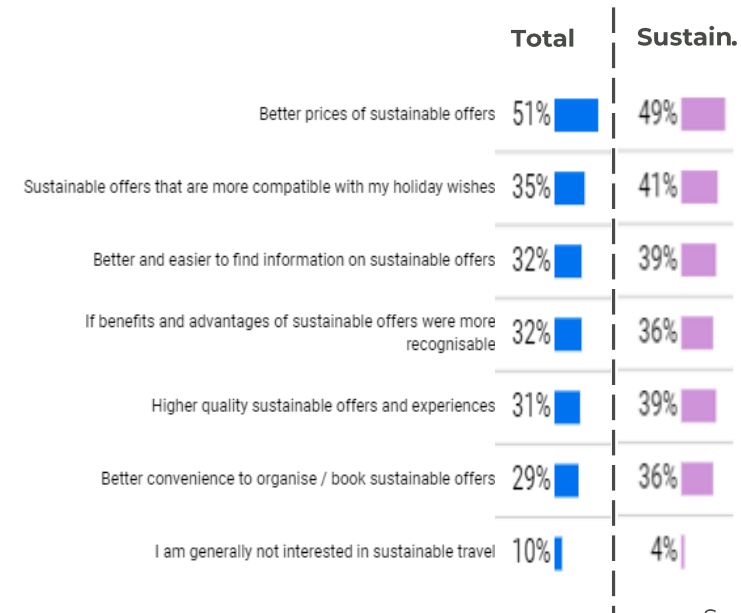
Importance of sustainability for choice of trip components



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



(*) During last outbound holiday trip.



Your contact

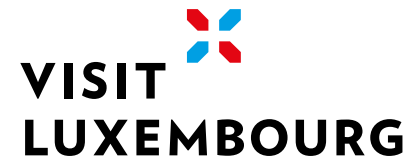


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