



Luxembourg for Tourism

Theme profile

NATURE HOLIDAYS

2023



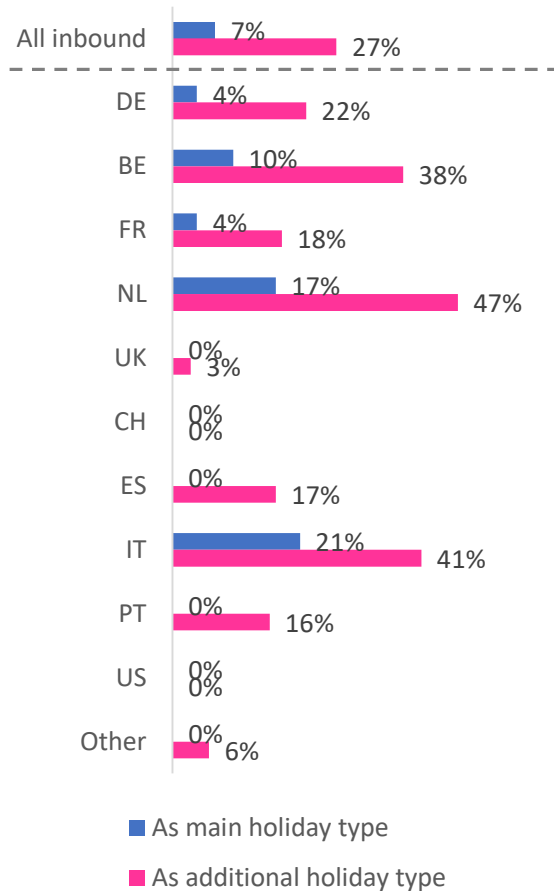
Market size of Nature holidays segment

Volume of leisure visitors with Nature as a holiday type

Overnight trips



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



Number of overnight trips to Luxembourg (estimate 2023)

Main holiday
94.000
 (7% of inbound overnight leisure trips to Luxembourg)

Additional holiday
352.000
 (27% of inbound overnight leisure trips to Luxembourg)

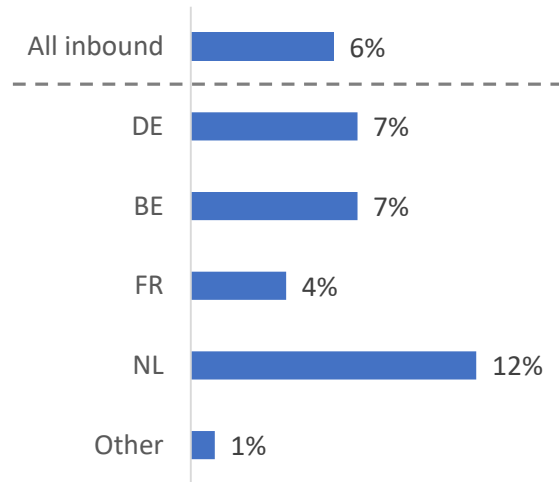
	Overnight trips: Main holiday	Overnight trips: Additional holiday
DE	7.000	42.000
BE	21.000	87.000
FR	5.000	23.000
NL	54.000	156.000
Other	7.000	44.000

Volume of leisure visitors with Nature as an excursion type

Same-day trips



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



Number of trips / excursions to Luxembourg (estimate 2023)

168.000
(6% of inbound same-day leisure trips to Luxembourg)

	Same-day trips
DE	43.000
BE	42.000
FR	27.000
NL	49.000
Other	5.000



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

Holiday types

Inbound leisure visitors with overnight, 2020-2023



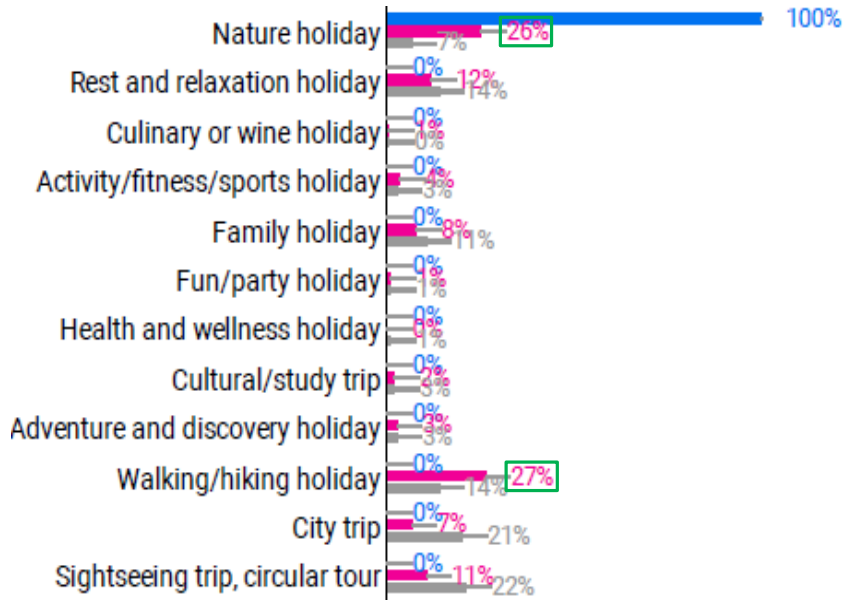
■ Nature as main holiday type

■ Nature as additional holiday type

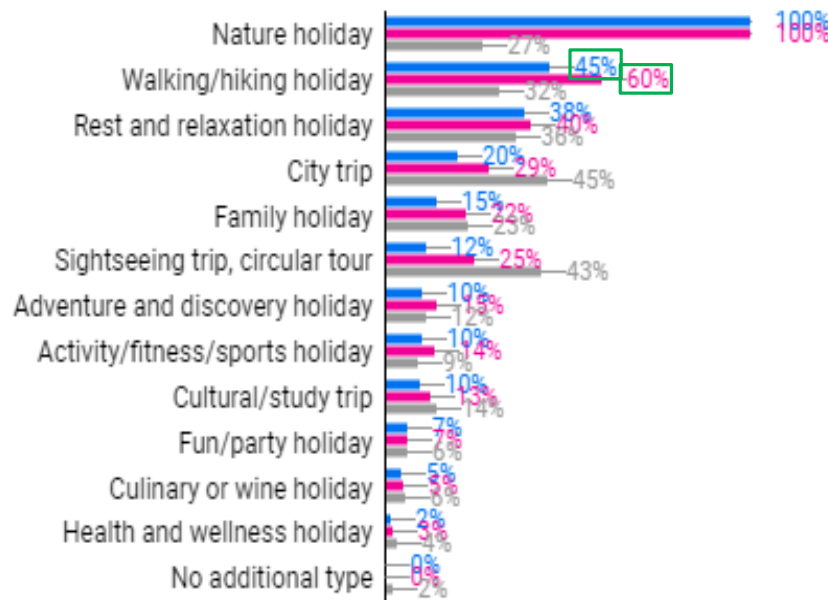
■ All visitors

 Significantly higher than average

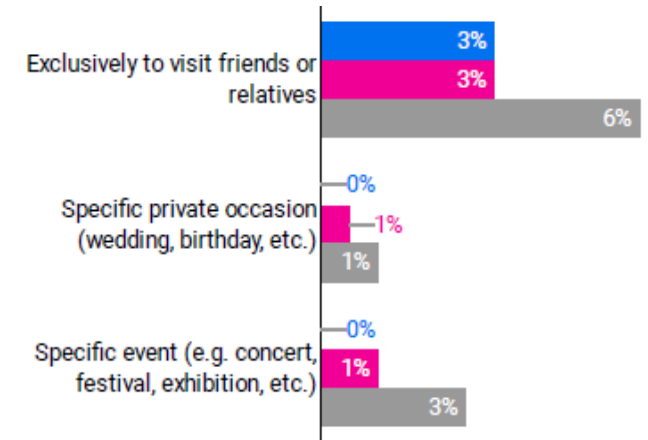
Main holiday types



Additional holiday types



Main purpose of overnight trip (if not holiday)



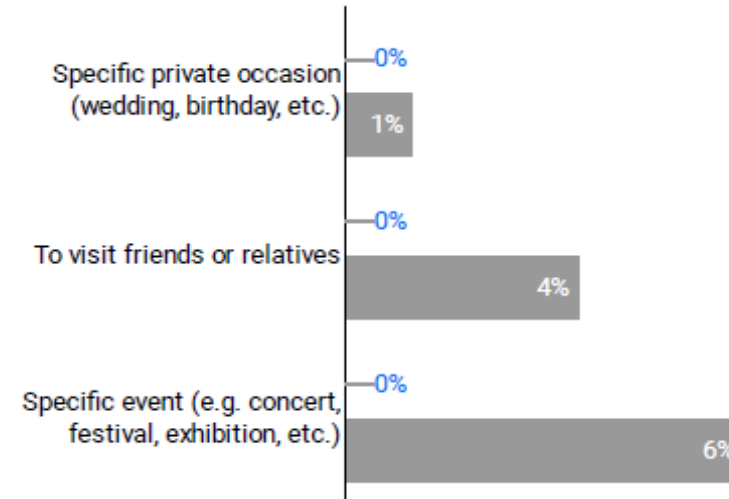
Types of excursions

Inbound leisure same-day visitors, 2020-2023



- Nature 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



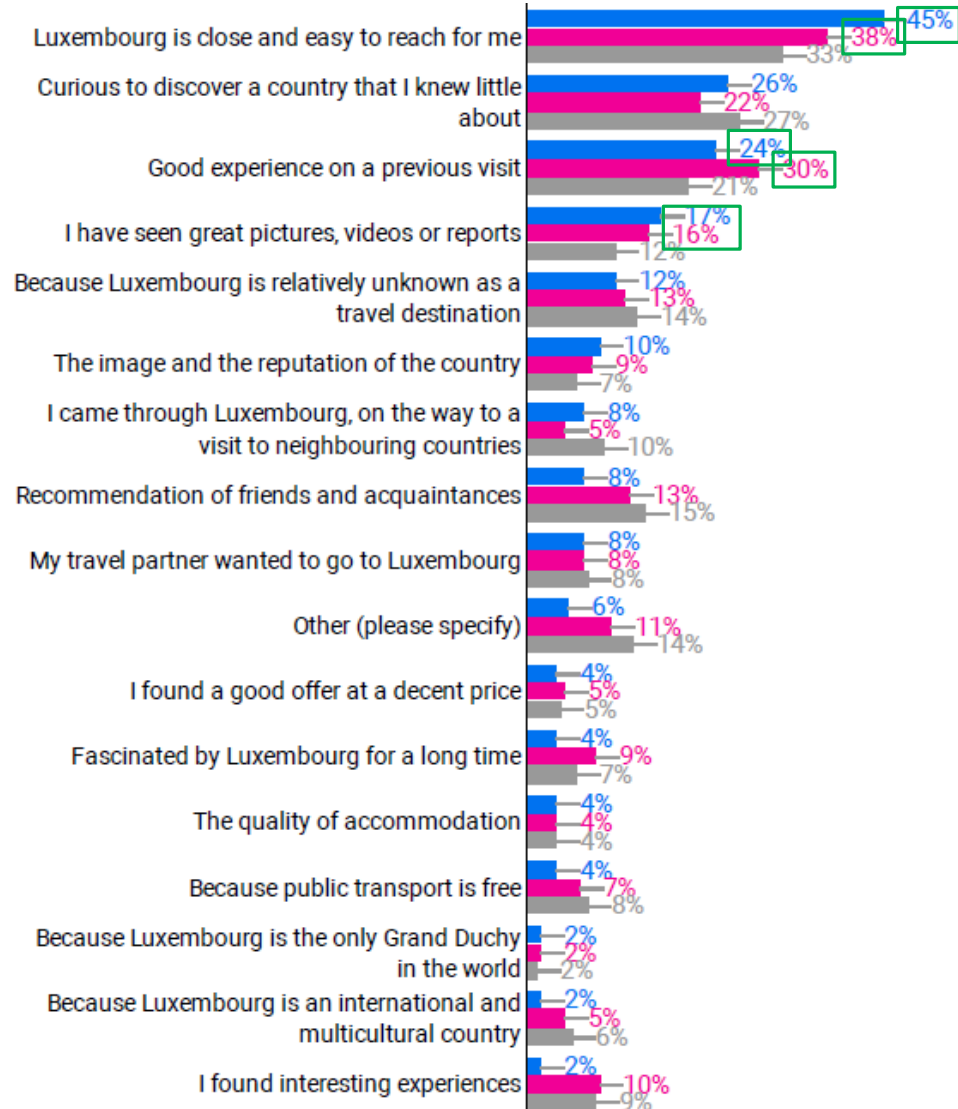
■ Nature as main holiday/excurs. type

■ Nature as additional holiday type

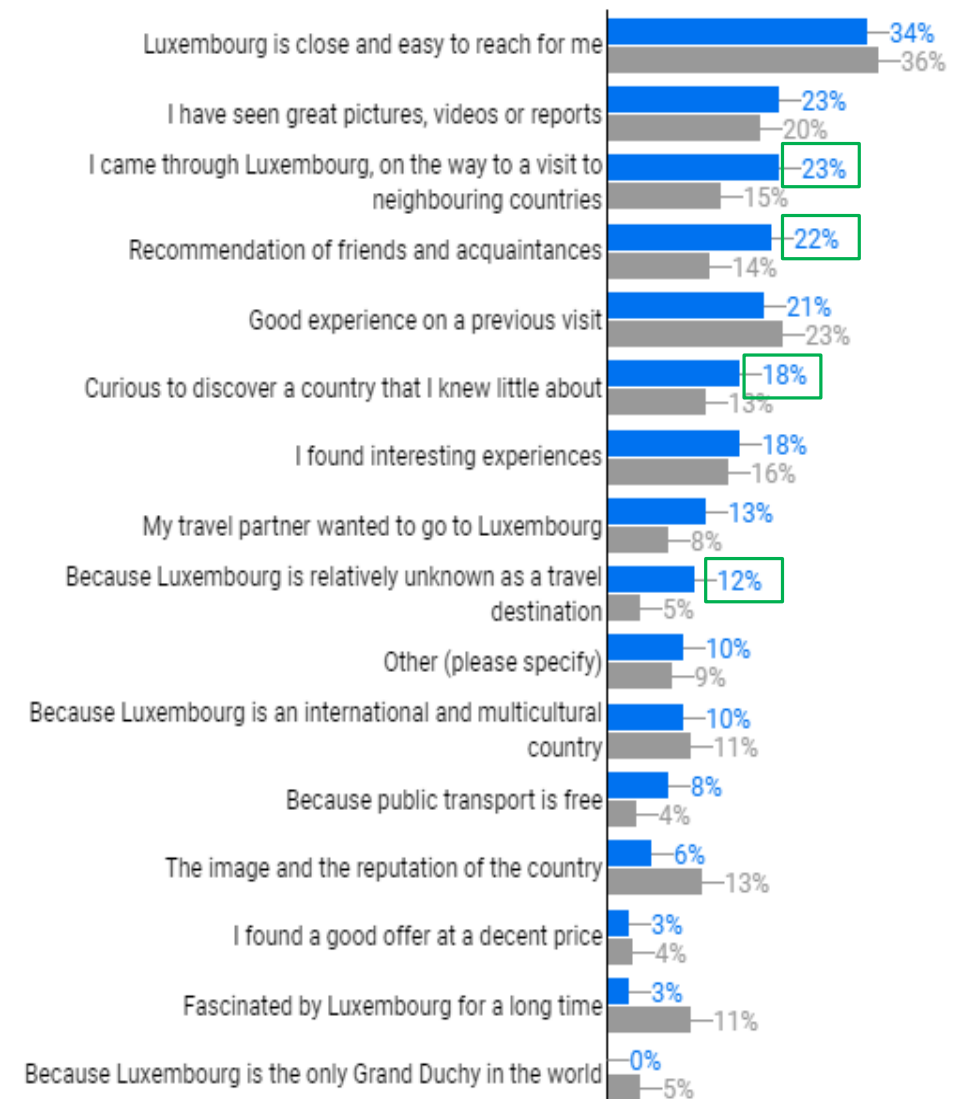
■ All visitors

 Significantly higher than average

Visitors with overnight



Day visitors



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

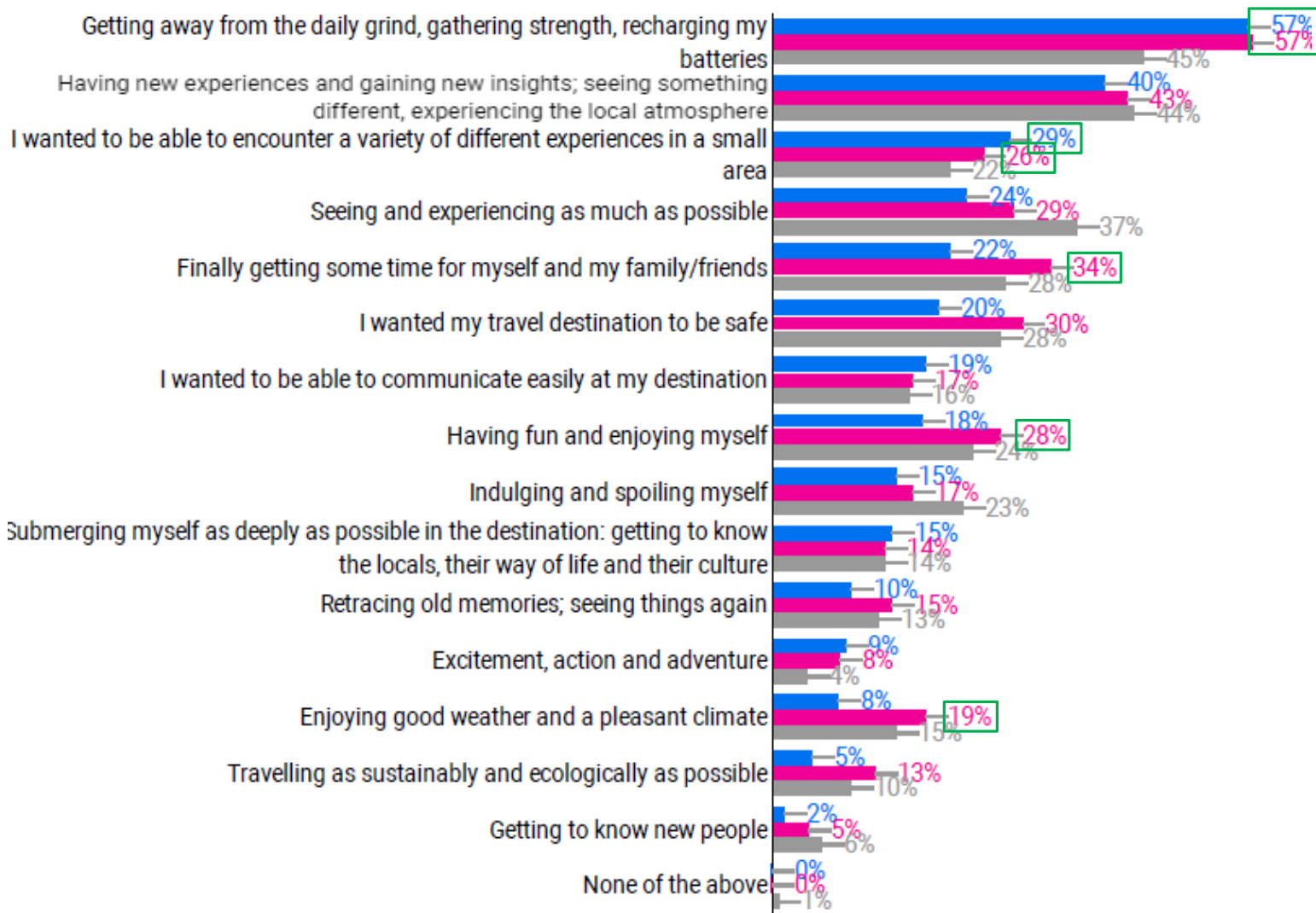
(*) Maximum 3 answers possible.

Key travel motives and emotions

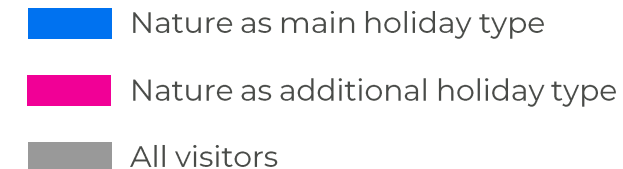
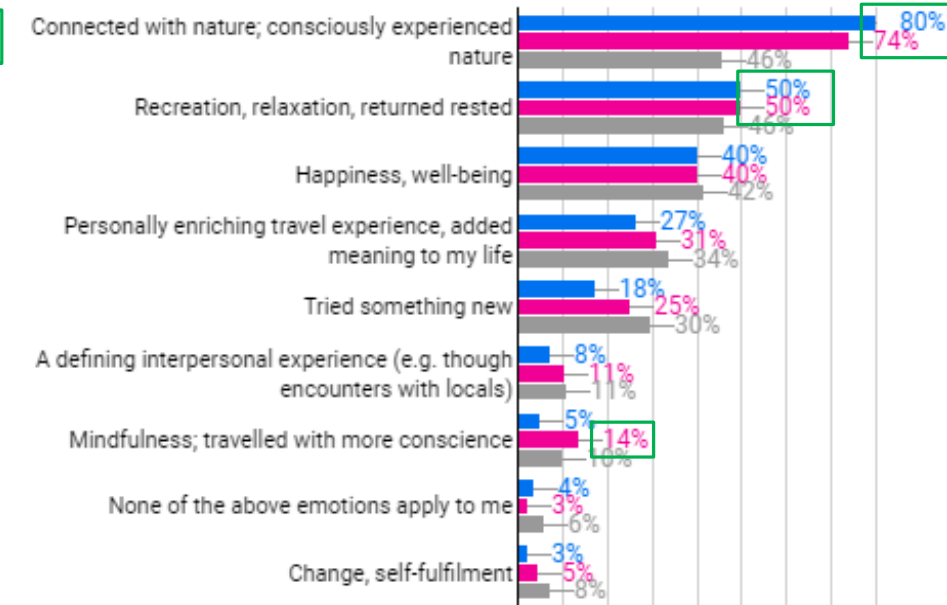
Inbound leisure visitors with overnight, 2020-2023



Travel motives



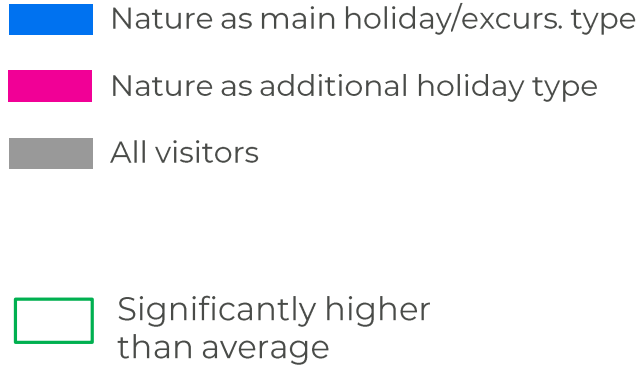
Emotions experienced during stay



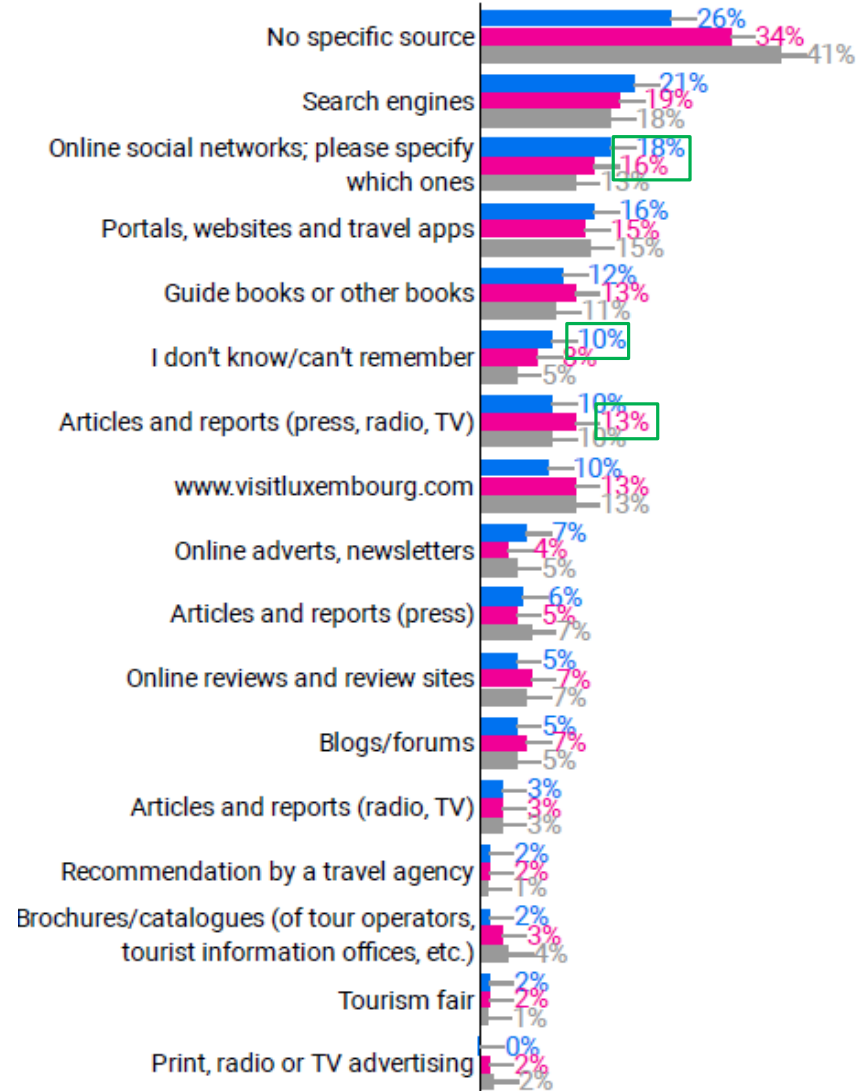
Significantly higher than average

Inspiration sources

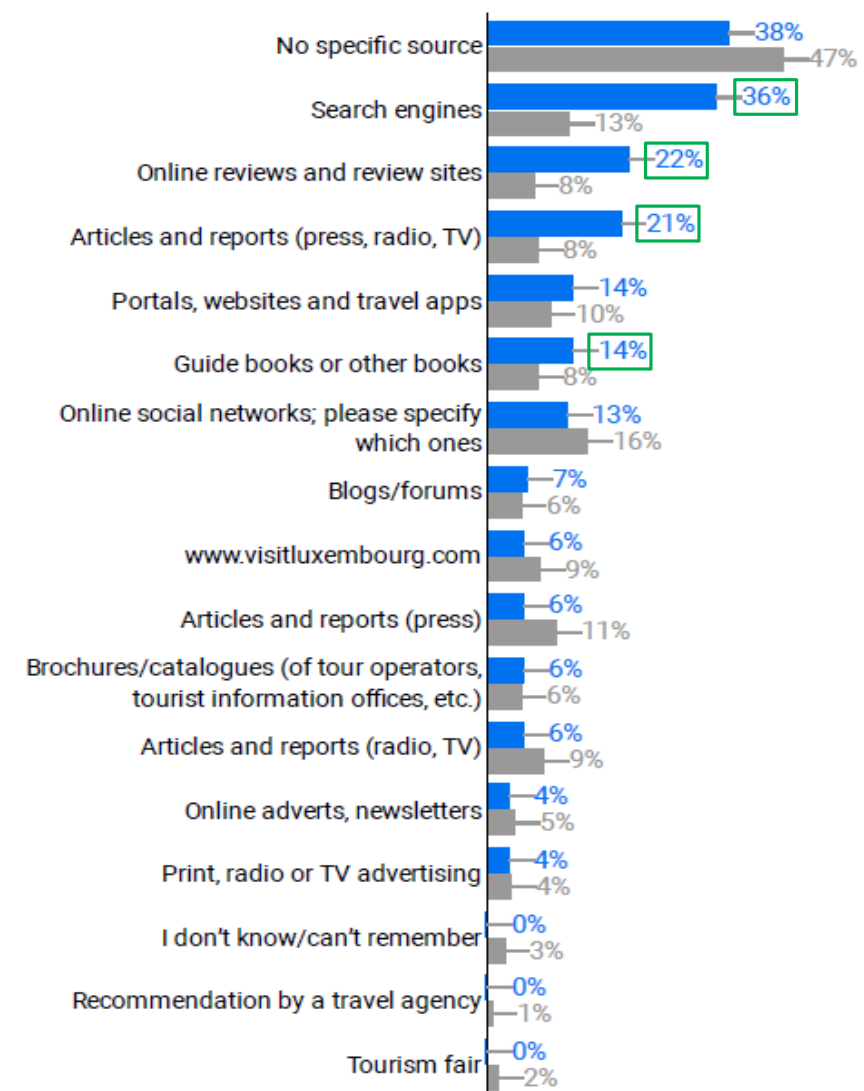
Inbound leisure visitors, 2020-2023



Visitors with overnight



Day visitors



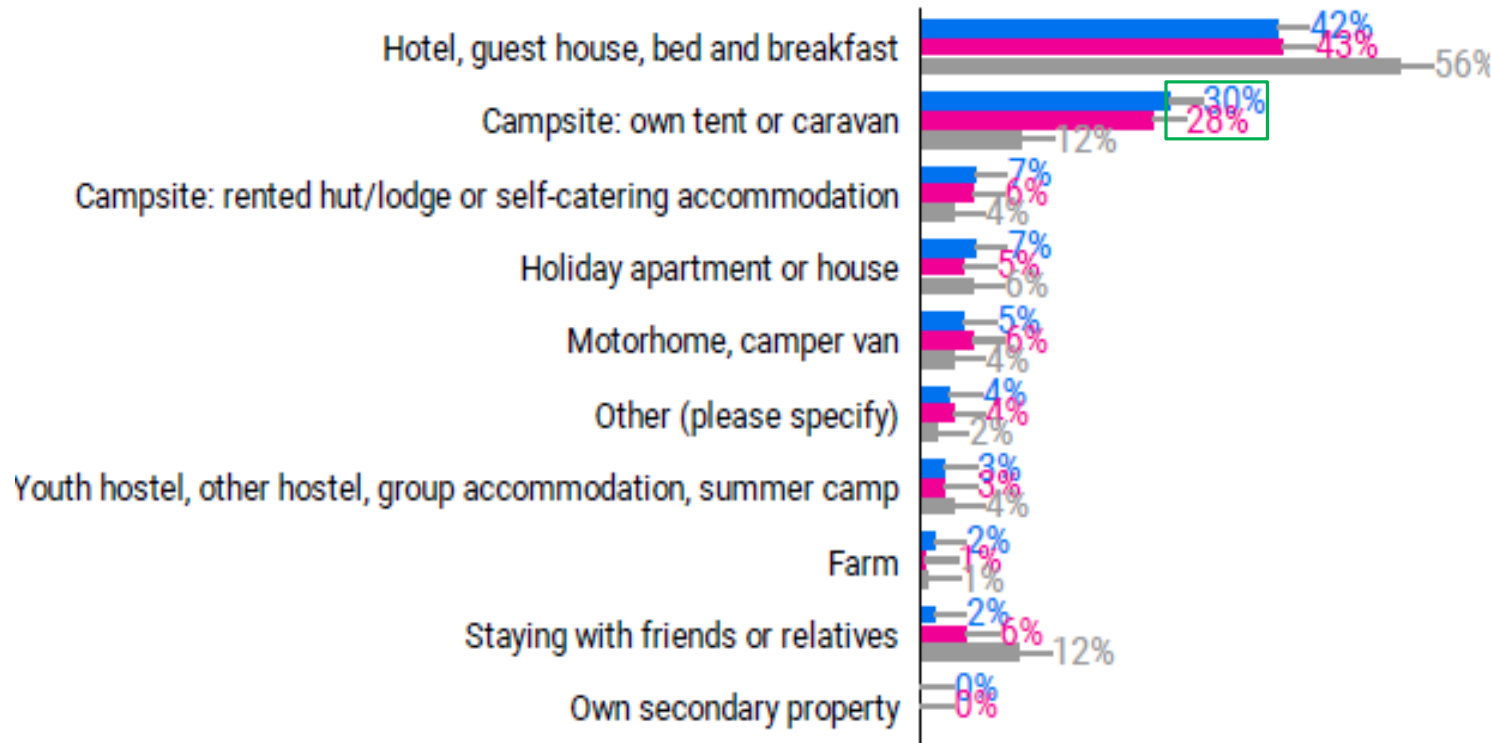
Type of accommodation, destination regions

Inbound leisure visitors with overnight, 2020-2023

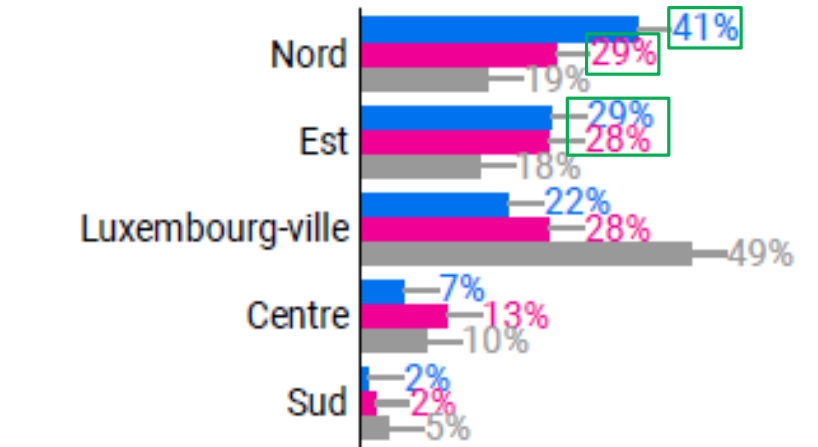


- Nature as main holiday type
- Nature as additional holiday type
- All visitors

Type of accommodation



Destination region



 Significantly higher than average



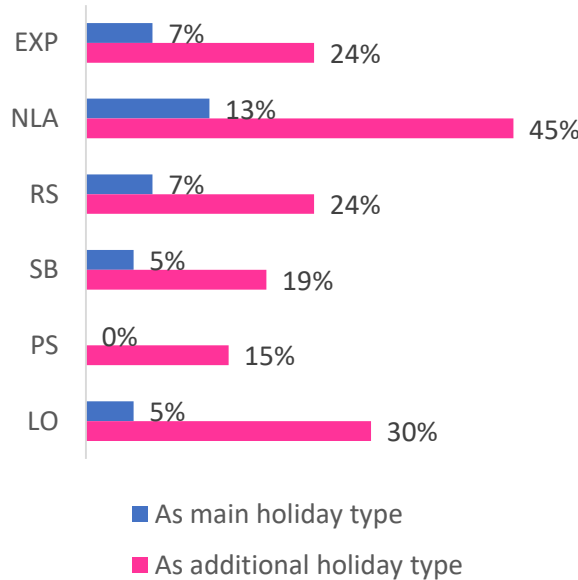
Target segments

Inbound leisure visitors, 2020-2023

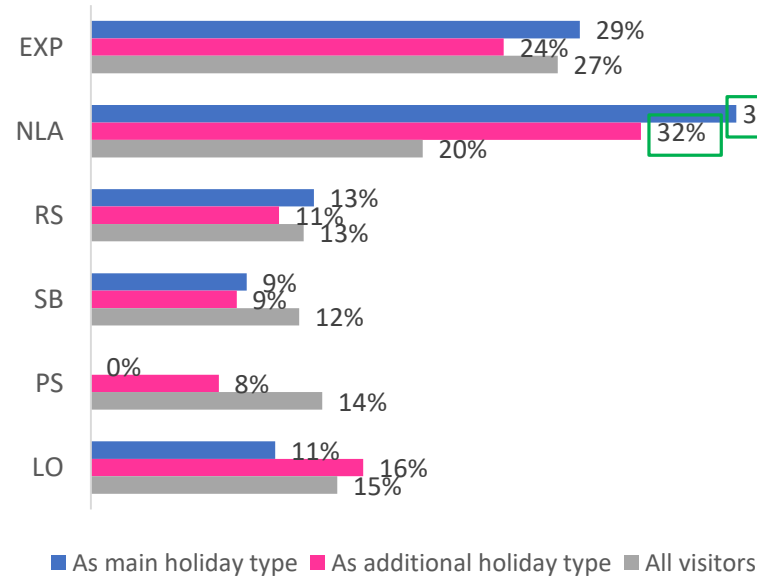
EXP – Explorers
 NLA – Nature-Loving Actives
 RS – Relaxation Seekers
 SB – Short Breakers
 PS – Perfection Seekers
 LO – Leisure Oriented

 Significantly higher than average

Visitors with overnight

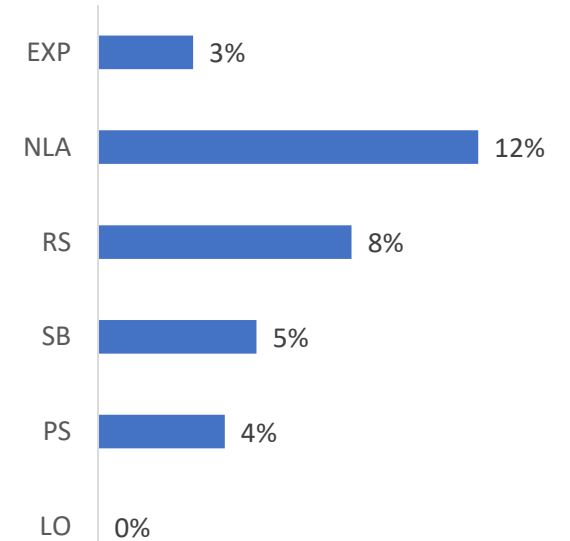


Reading example: 7% of Explorers have nature as main holiday type



Reading example: 29% of visitors with nature as main holiday type are Explorers

Day visitors

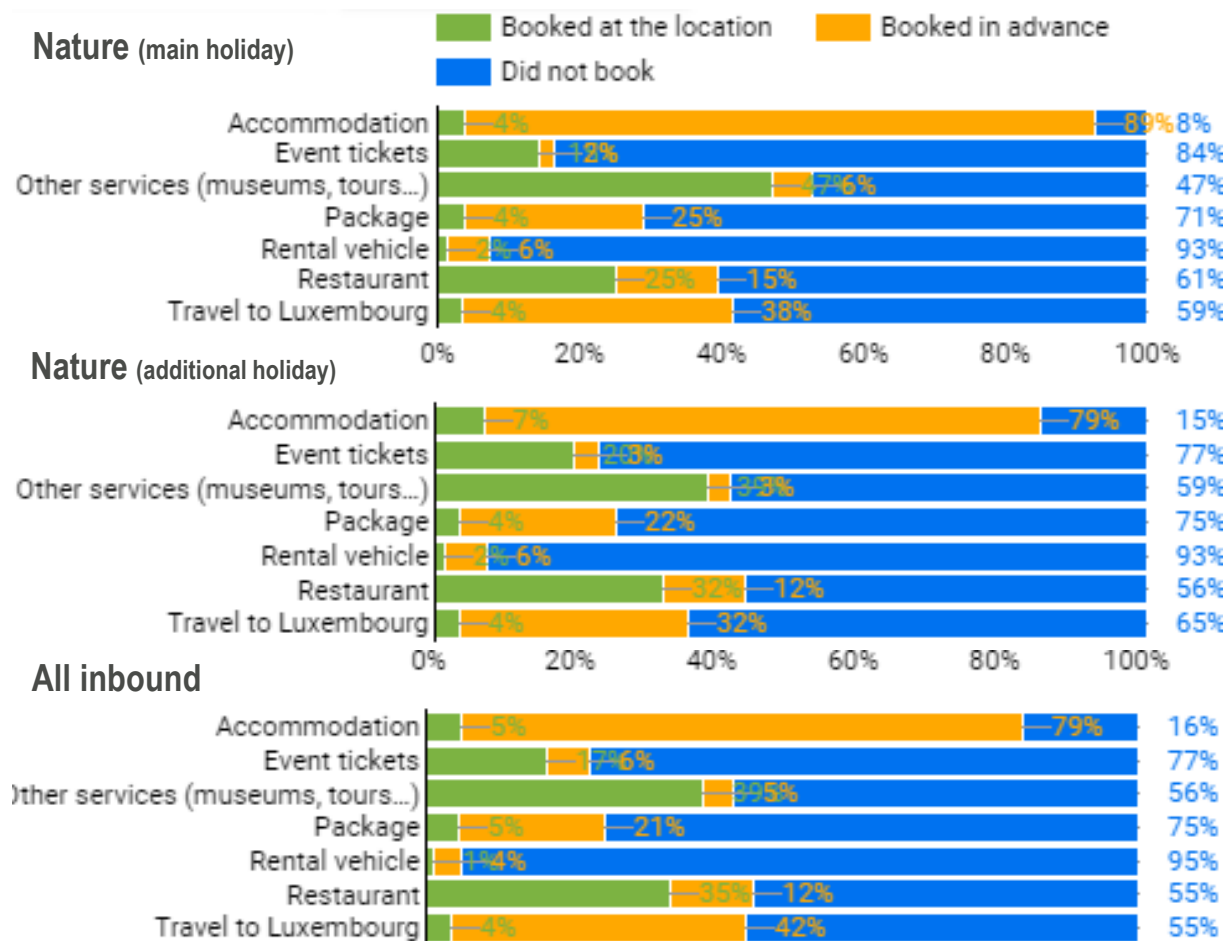


Booking behaviour

Inbound leisure visitors with overnight, 2020-2023

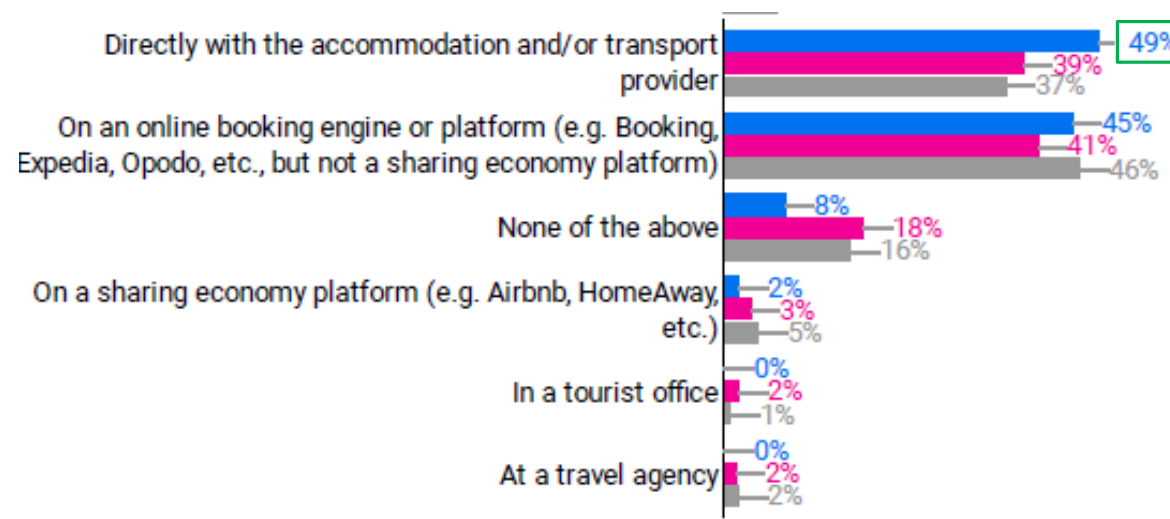


Booking of travel items



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

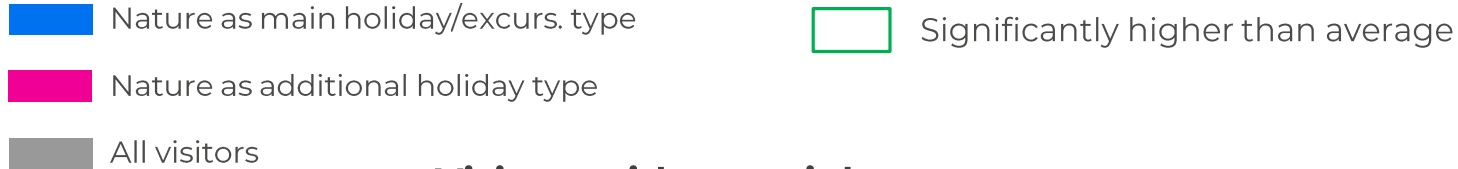
Booking channels



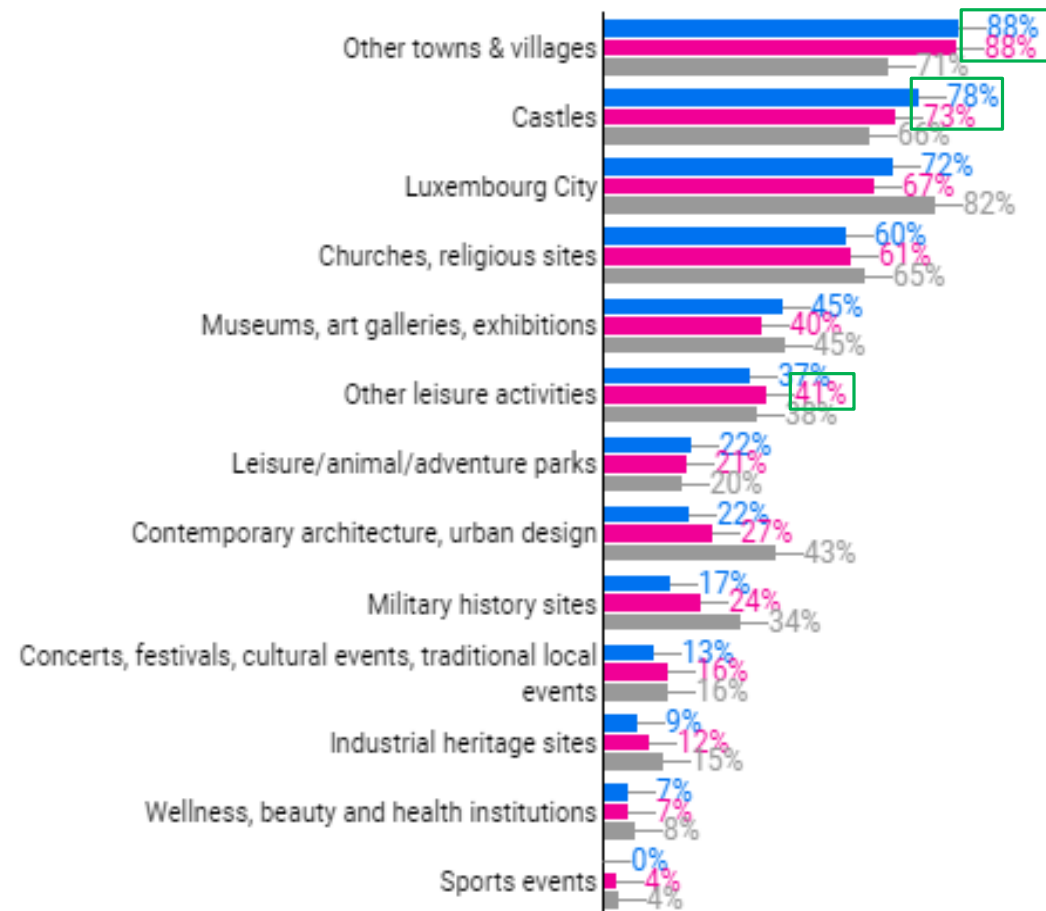
Significantly higher than average

Places visited during leisure stays

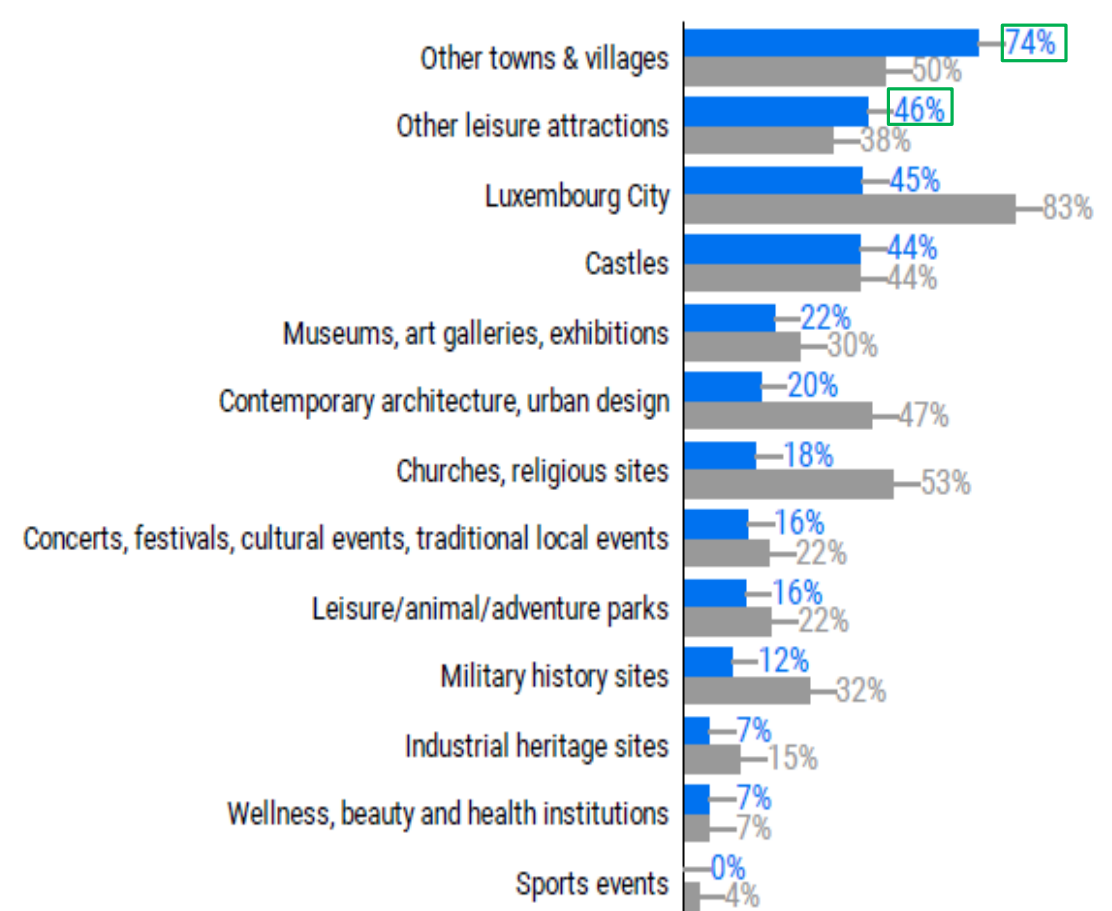
Inbound leisure visitors, 2020-2023



Visitors with overnight

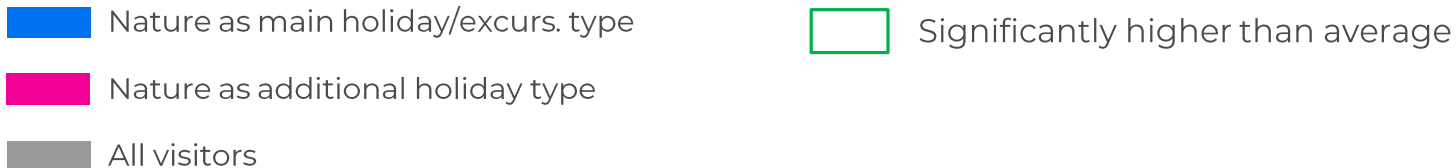


Day visitors

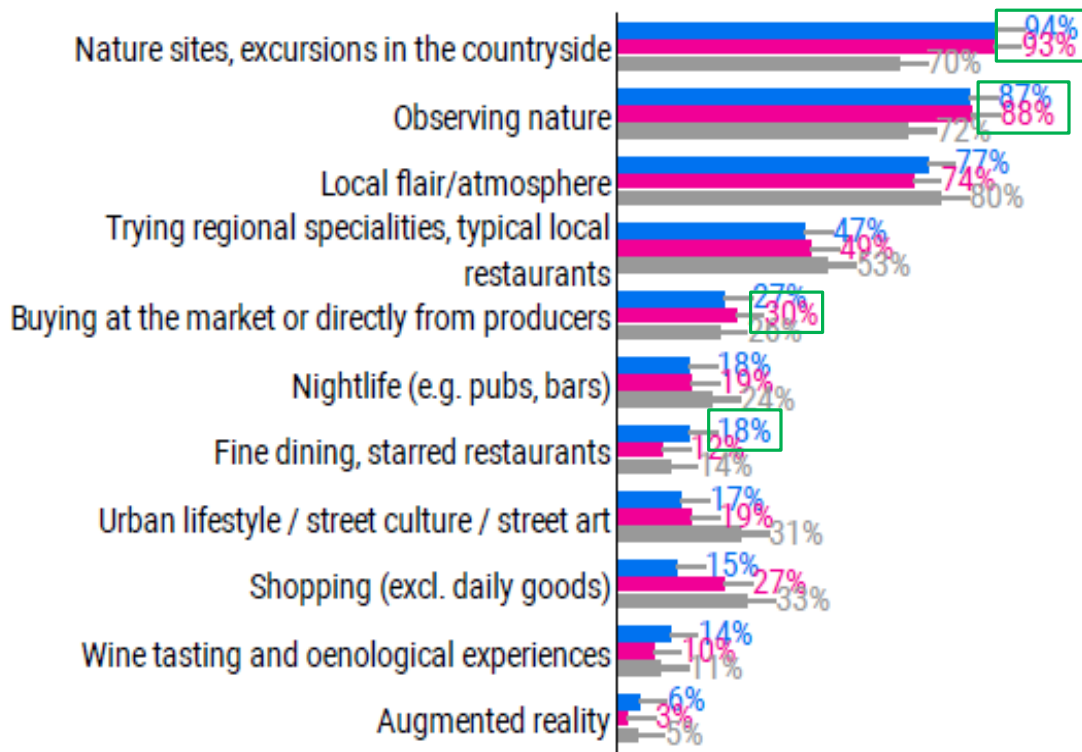


Non-sporting activities undertaken during leisure stays

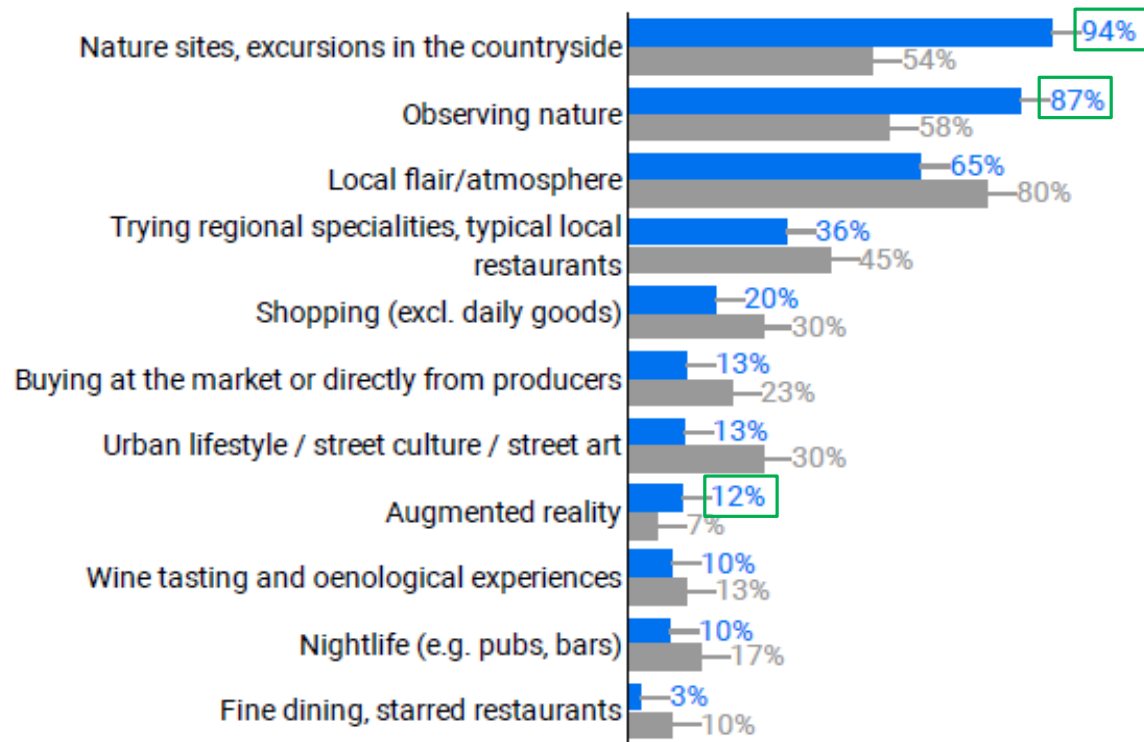
Inbound leisure visitors, 2020-2023



Visitors with overnight



Day visitors

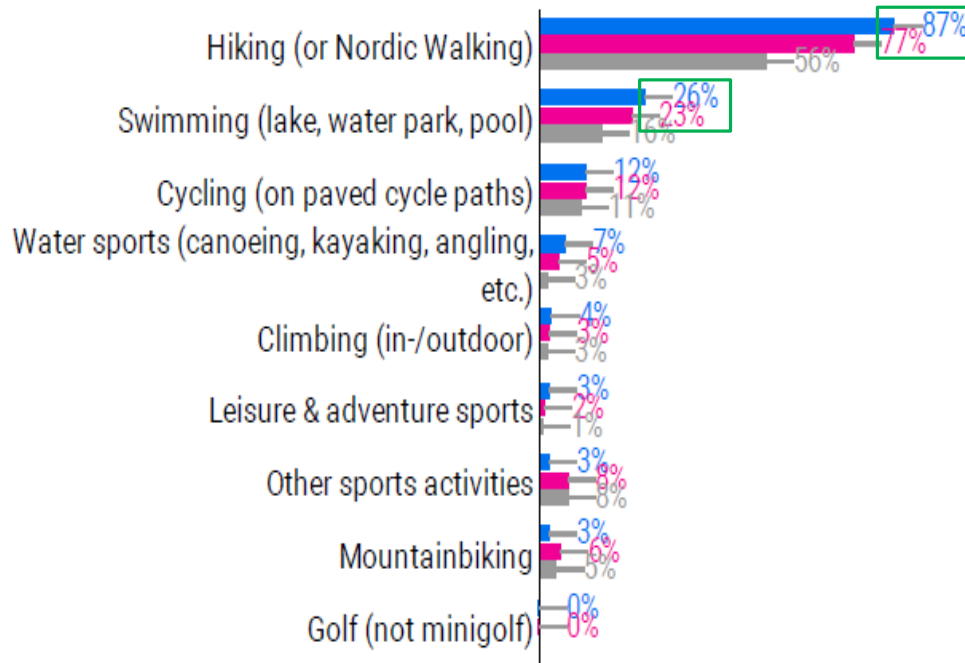


Sporting activities undertaken during leisure stays

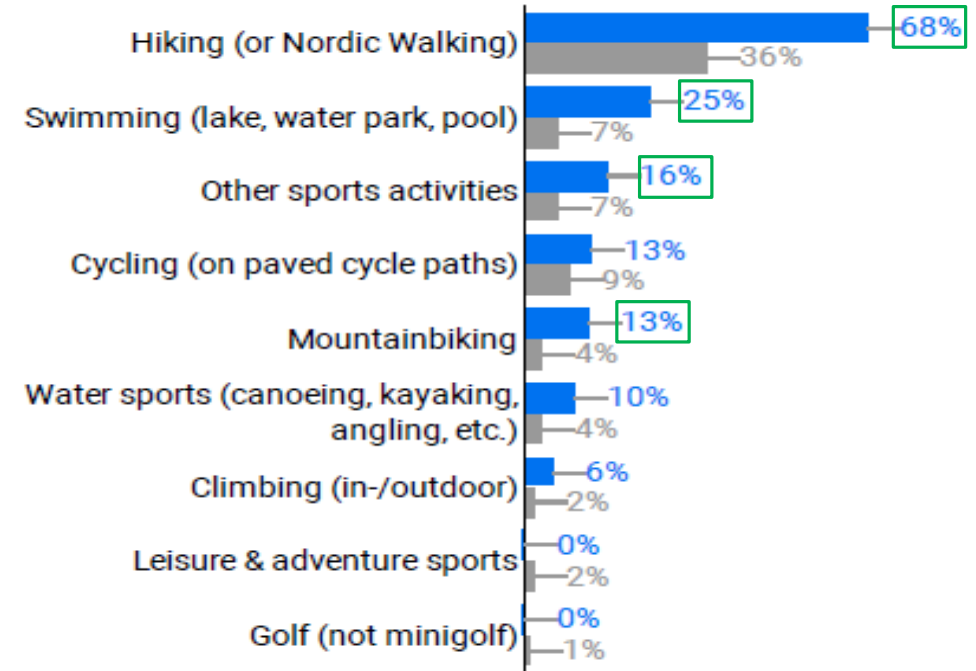
Inbound leisure visitors, 2020-2023



Visitors with overnight



Day visitors

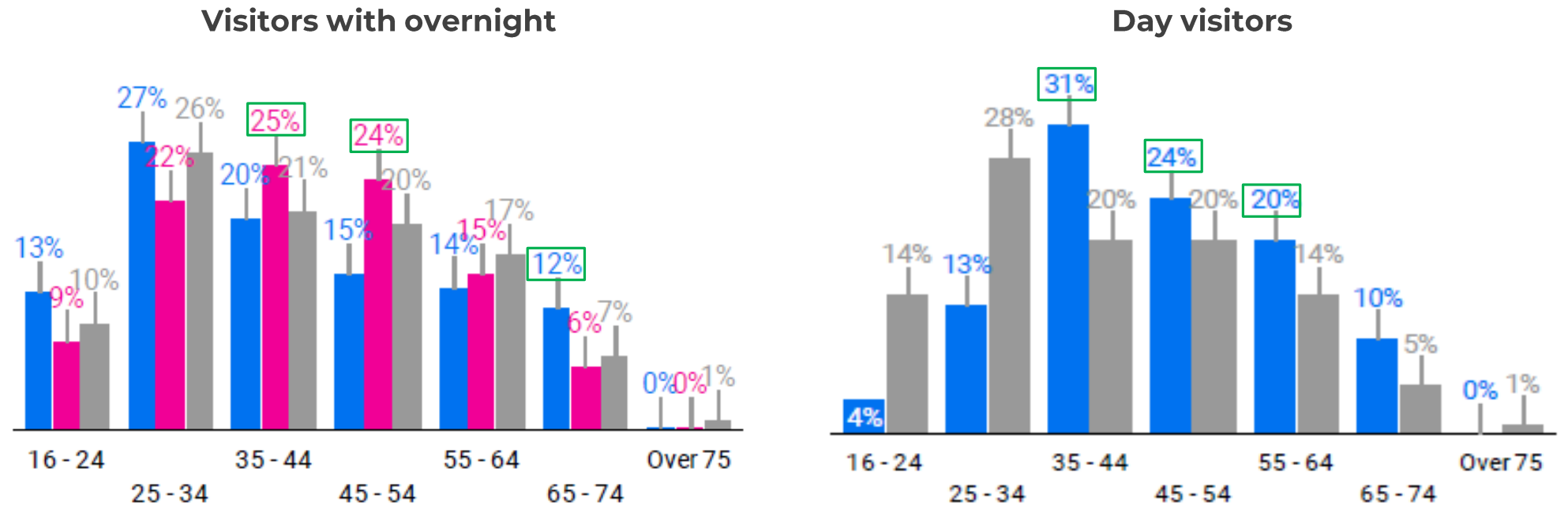




Age groups

Inbound leisure visitors, 2020-2023

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



Significantly higher than average

Transport (to and in destination)

Inbound leisure visitors, 2020-2023



■ Nature as main holiday/excurs. type

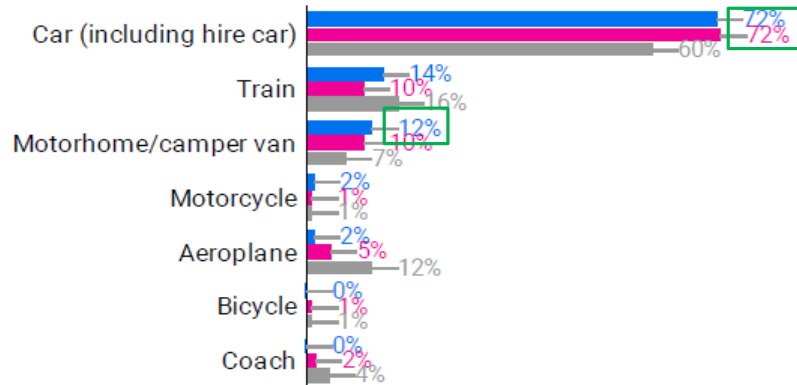
■ Nature as additional holiday type

■ All visitors

□ Significantly higher than average

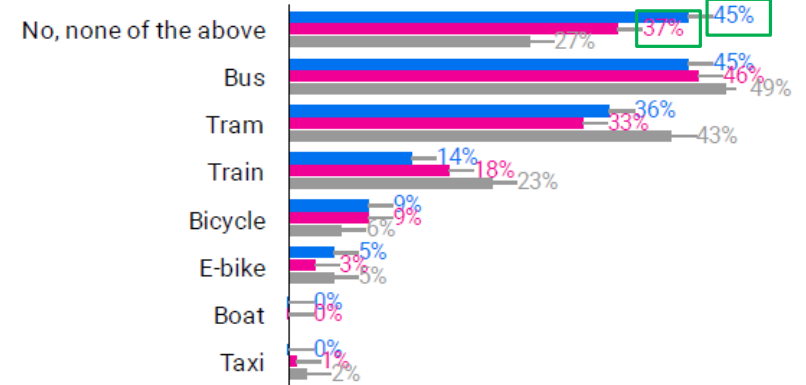
Transport to destination

Visitors with overnight

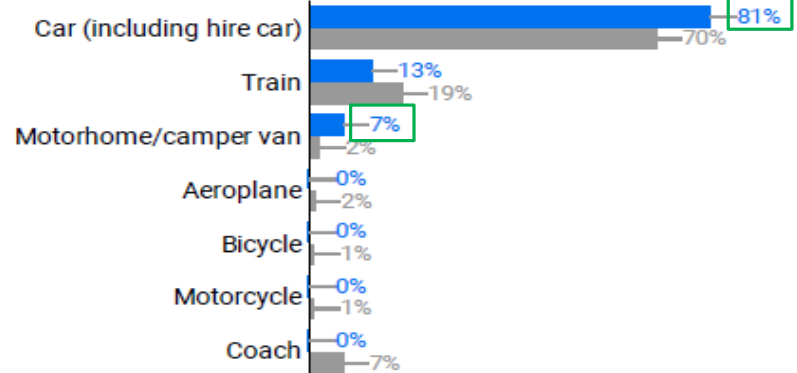


Transport in destination

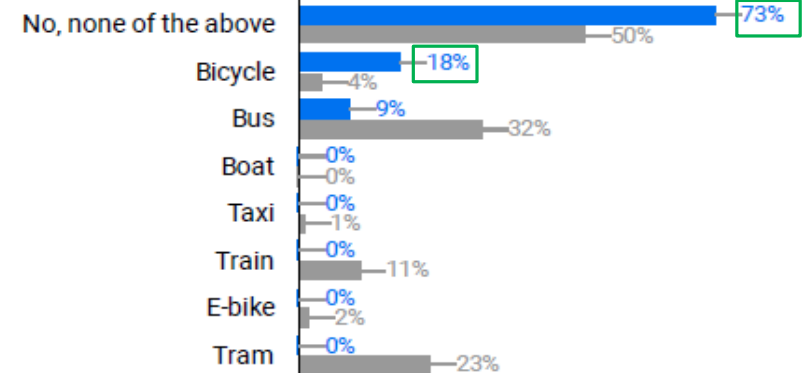
Visitors with overnight



Day visitors



Day visitors



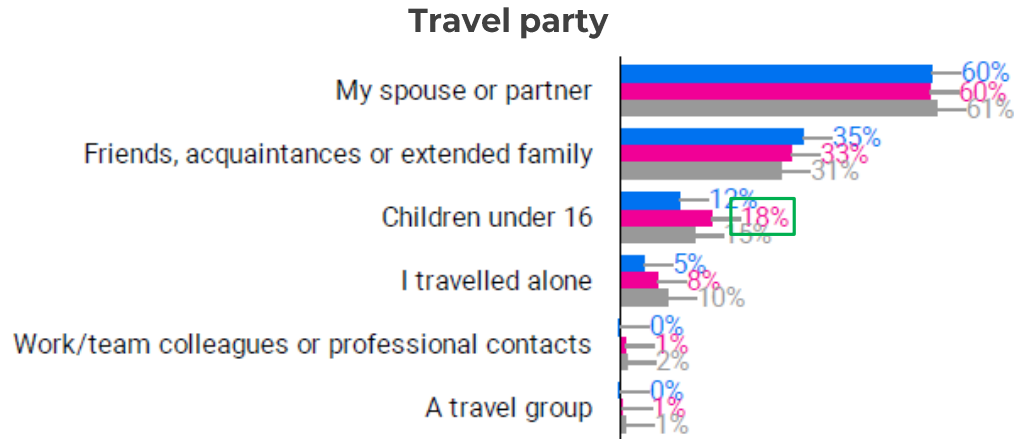
Travel party, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2020-2023

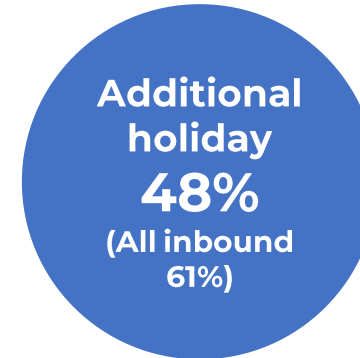
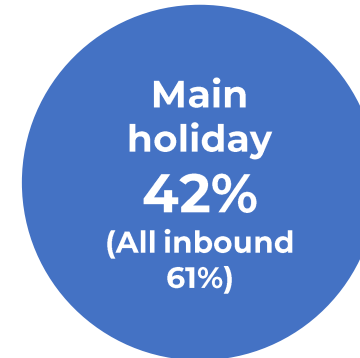


- Nature as main holiday type
- Nature as additional holiday type
- All visitors

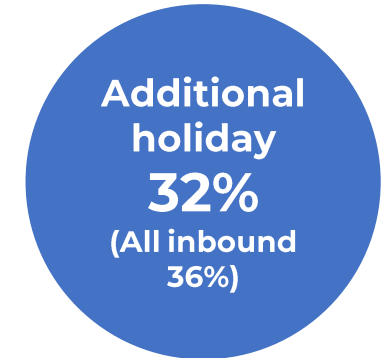
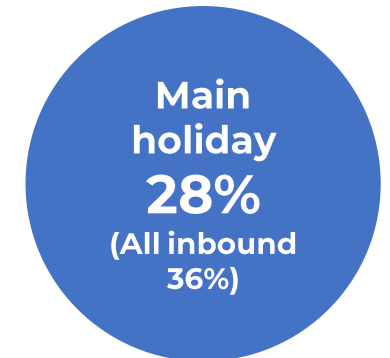
 Significantly higher than average



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip



Travel party and repeat visits

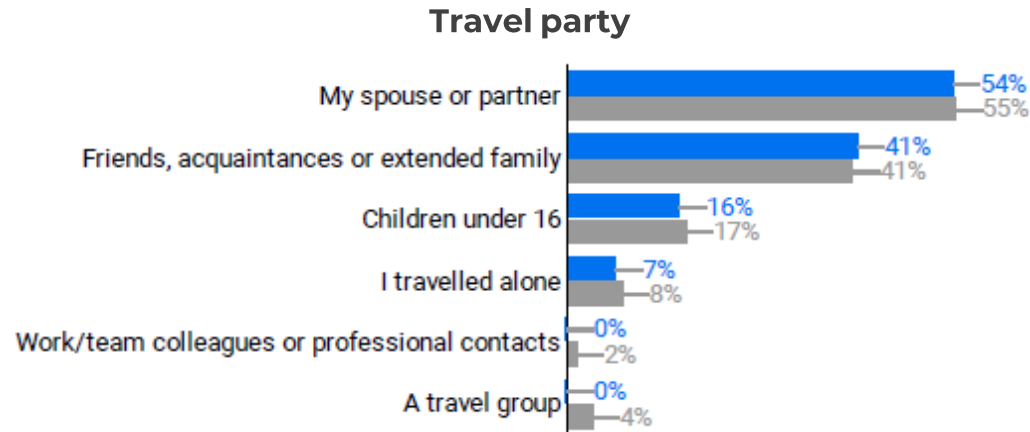
Inbound leisure same-day visitors, 2020-2023



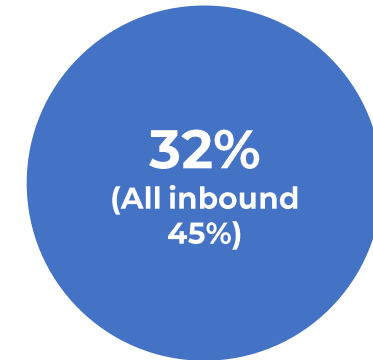
 Nature as excursion type

 All visitors

 Significantly higher than average



First-time visitors

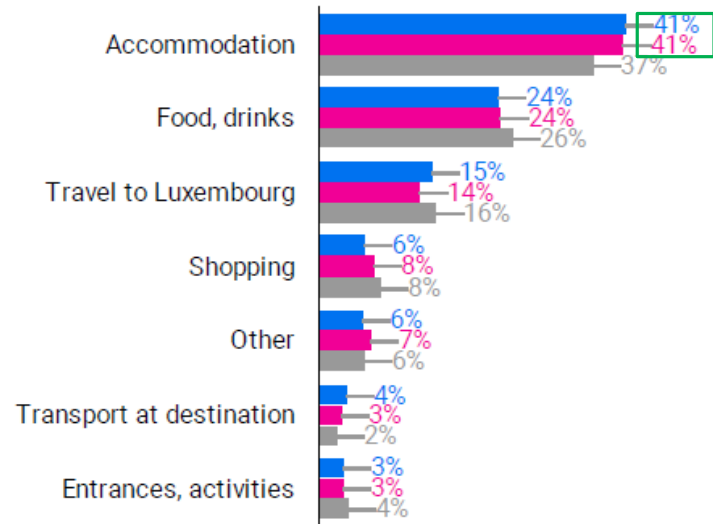


Expenditure, length of stay and quality vs price orientation



Inbound leisure visitors with overnight, 2020-2023

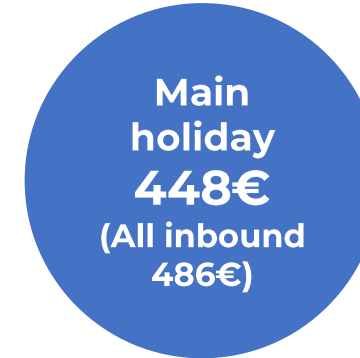
Breakdown of expenditure by categories



Length of stay



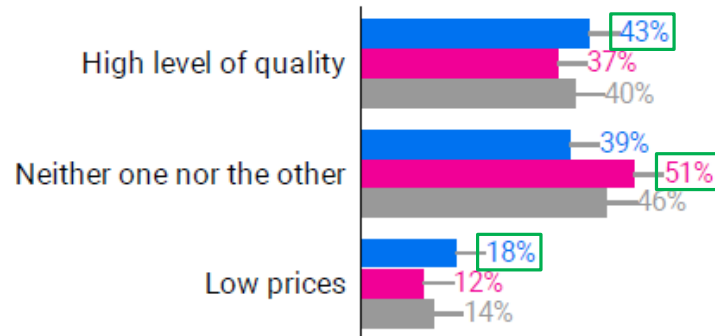
Spend/pers./trip



Spend/pers./day



Quality vs. price orientation





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

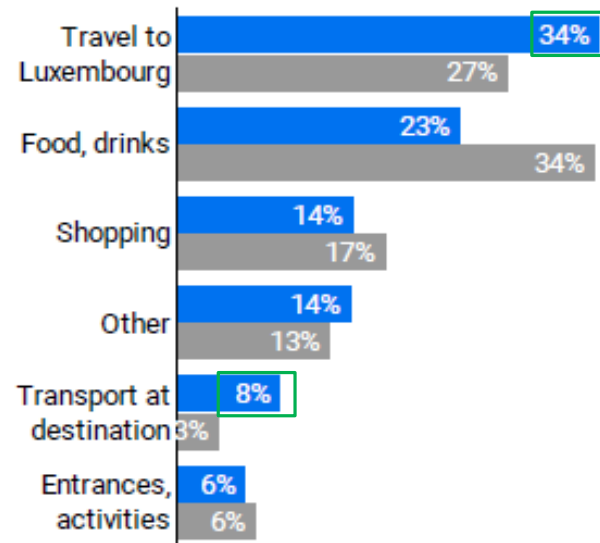
Expenditure

Inbound leisure same-day visitors, 2020-2023



 Nature 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



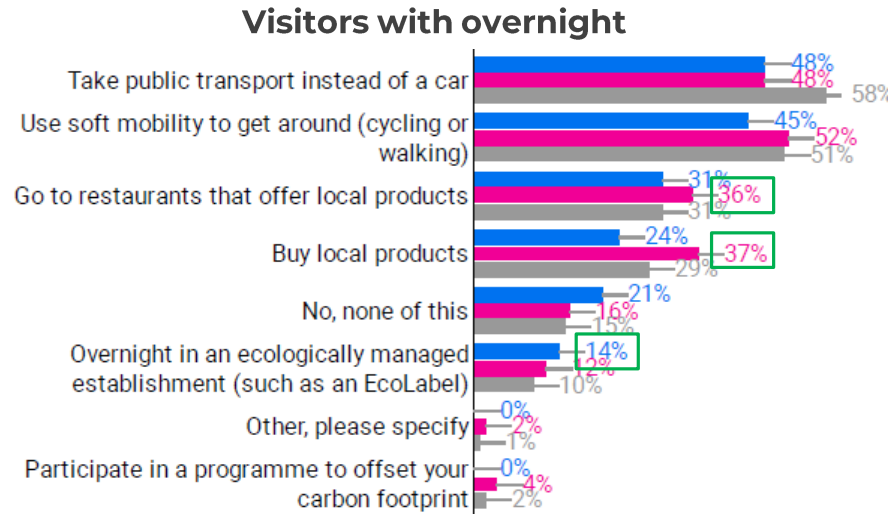
■ Nature as main holiday/excurs. type

■ Nature as additional holiday type

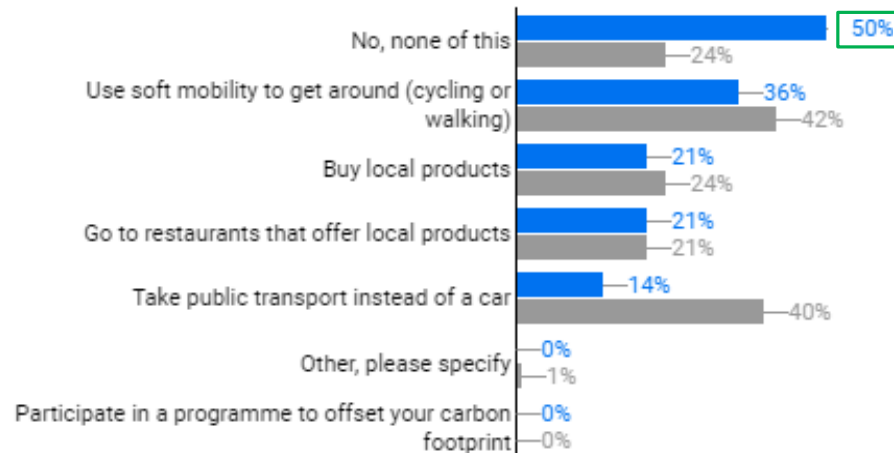
■ All visitors

□ Significantly higher than average

Sustainable actions during stay

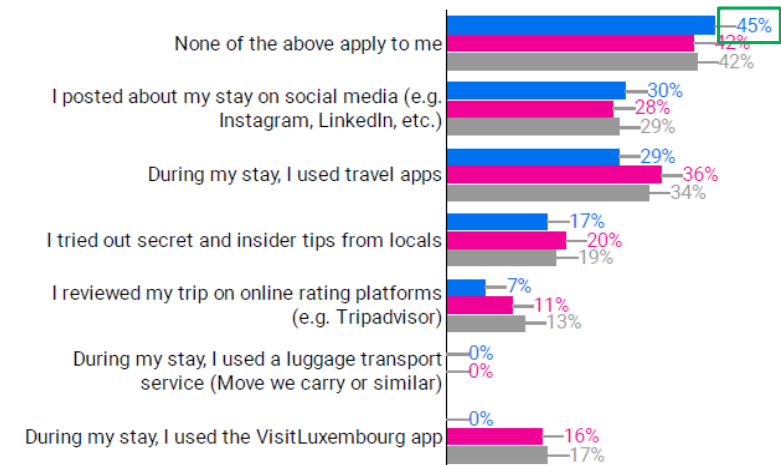


Day visitors

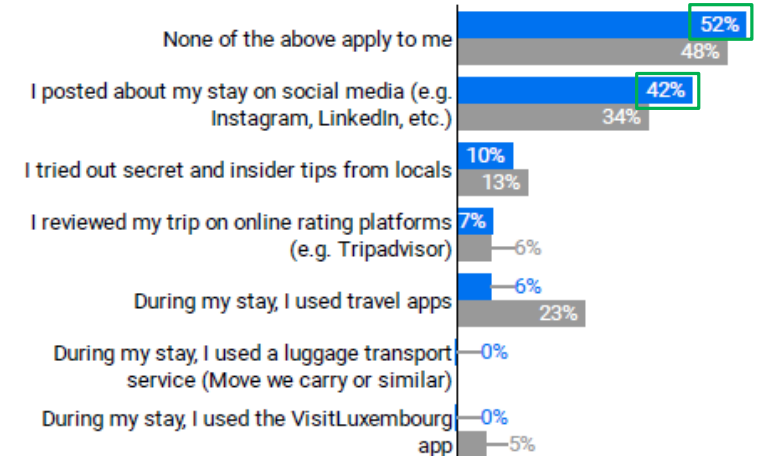


Services used during stay

Visitors with overnight



Day visitors

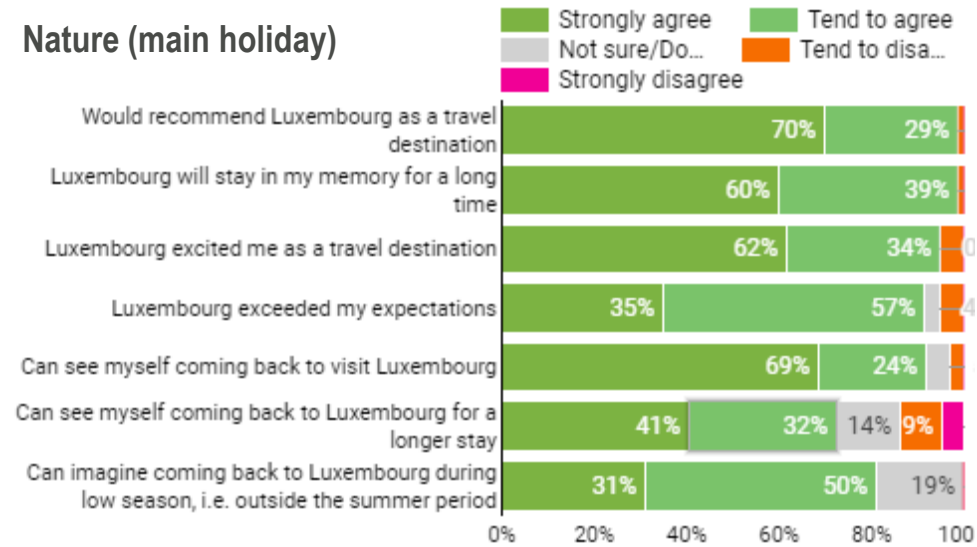


Visitor satisfaction and recommendation

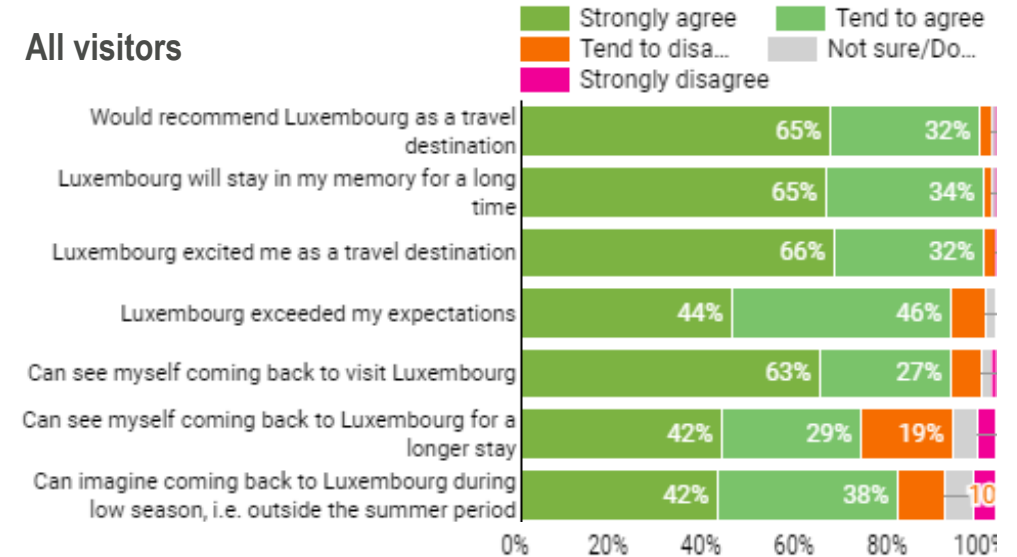
Inbound leisure visitors with overnight, 2020-2023



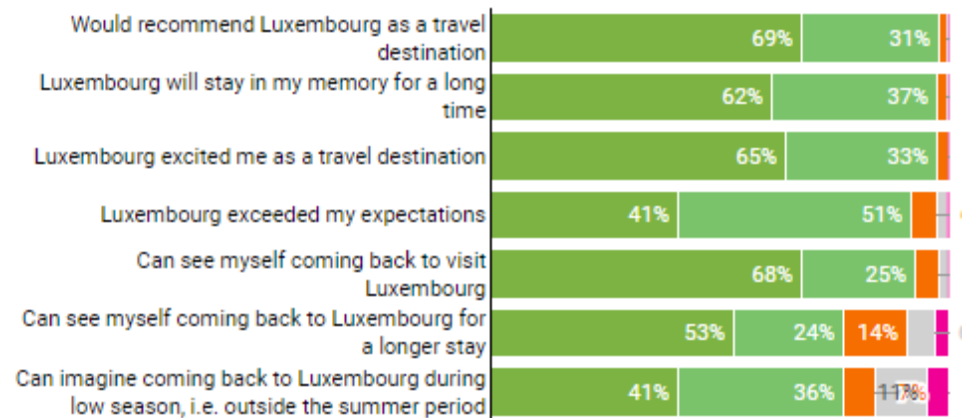
Nature (main holiday)



All visitors

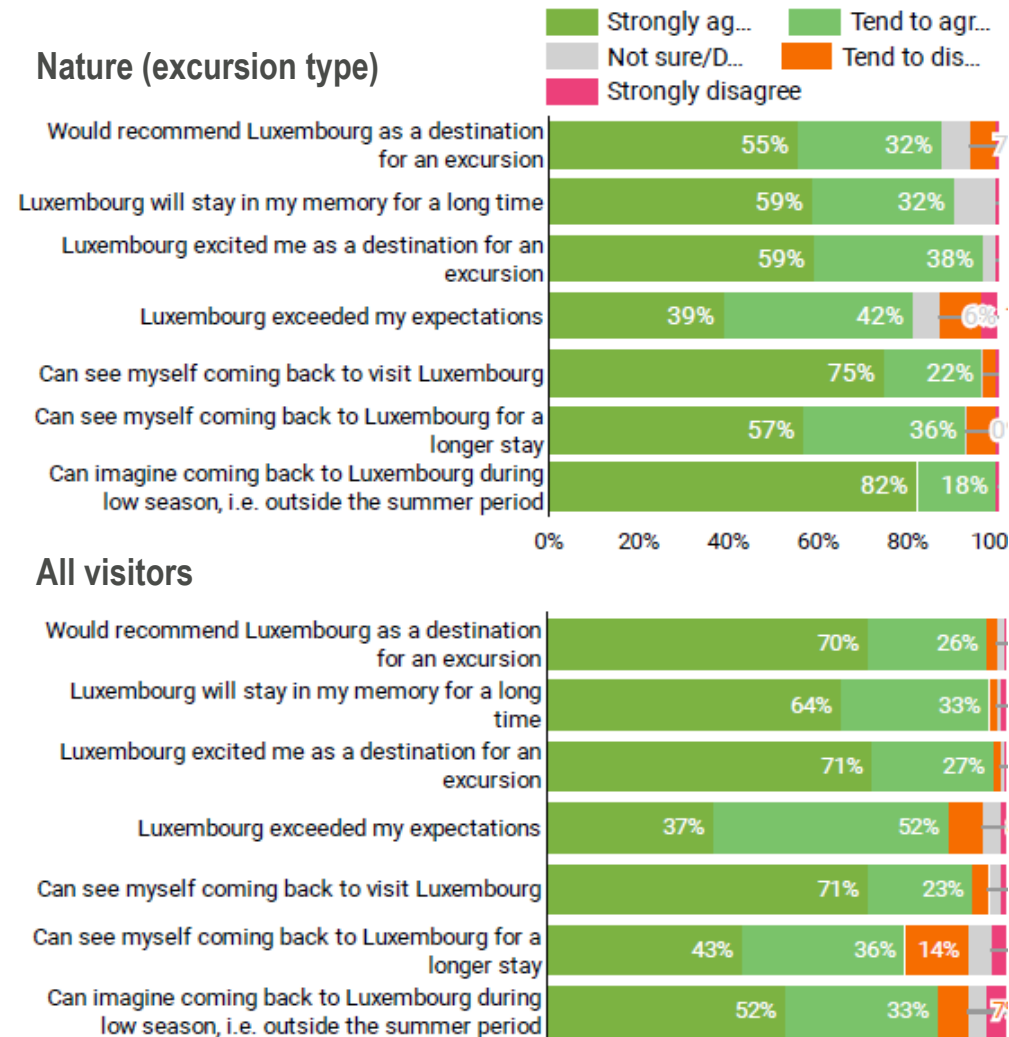


Nature (additional holiday)



Visitor satisfaction and recommendation

Inbound leisure same-day visitors, 2020-2023

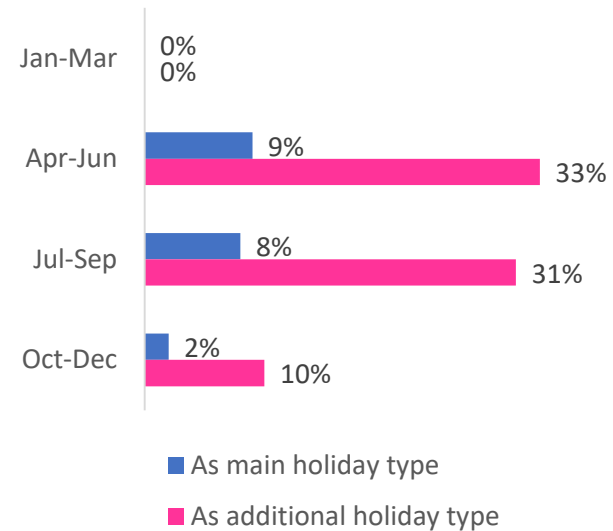


Trip seasonality

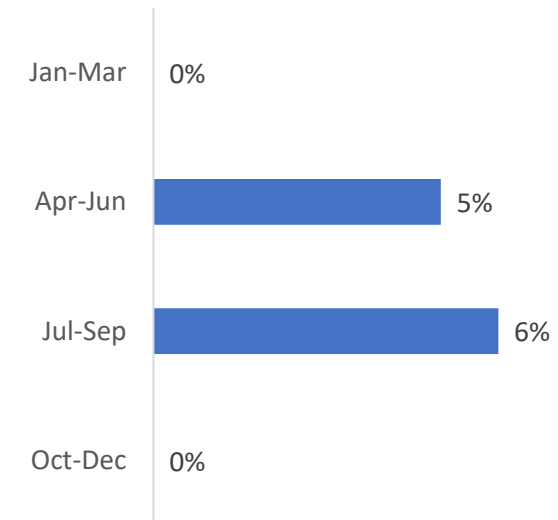
Inbound leisure visitors, 2020-2023



Visitors with overnight



Day visitors














**Destination Awareness &
Growth Potential for
Nature & Countryside holiday segments**

General theme interest - Enjoying Nature













	Rank (*)	Total themes in survey	% „very interested“	% „interested“	% „interested“, Ø all themes	„Interested“, population, mn (**)
Average Europe	3	33	-	71%	54%	-
	3	33	50%	70%	52%	42,2
	2	33	49%	68%	53%	8,7
	1	33	49%	71%	54%	4,7
	2	33	51%	71%	53%	4,7
	1	33	53%	73%	51%	6,0
	4	33	47%	69%	55%	32,3
	5	33	43%	70%	53%	33,8
	3	20	28%	72%	40%	30,7
	4	20	30%	71%	44%	24,5
	2	21	37%	71%	47%	19,9
	4	24	40%	68%	54%	2,4
	3	24	44%	69%	51%	2,9
	3	24	35%	67%	52%	4,8
	4	24	64%	77%	60%	5,8

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

General theme interest - Countryside (e.g., staying on farm, vineyard...)












	Rank (*)	Total themes in survey	% „very interested“	% „interested“	% „interested“, Ø all themes	„Interested“, population, mn (**)
Average Europe	22	33	-	48%	54%	-
	25	33	22%	45%	52%	26,8
	24	33	21%	46%	53%	5,9
	27	33	17%	43%	54%	2,9
	24	33	20%	44%	53%	2,9
	20	33	19%	46%	51%	3,8
	25	33	22%	48%	55%	22,3
	17	33	25%	54%	53%	25,9
	12	20	-	42%	40%	17,9
	13	20	-	46%	44%	15,9
	12	21	-	47%	47%	13,2
	17	24	25%	50%	54%	1,8
	16	24	22%	49%	51%	2,0
	13	24	22%	52%	52%	3,8
	12	24	32%	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 – Enjoying Nature



	Rank (*)	Total themes in survey	% „very suitable“	% „very suitable“, Ø all themes	„very suitable“, population, mn (**)
Average Europe	5	26	32%	24%	-
	4	26	32%	23%	19,4
	1	26	54%	26%	6,9
	5	26	29%	22%	1,9
	7	26	31%	23%	2,0
	1	26	56%	25%	4,6
	9	26	27%	22%	12,7
	4	26	31%	22%	14,8
	6	15	22%	21%	9,4
	5	15	28%	25%	9,7
	8	10	21%	27%	5,9
	6	20	29%	27%	1,0
	6	20	28%	24%	1,2
	11	20	20%	21%	1,5
	7	20	42%	33%	3,2

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.

Luxembourg's perceived theme competence - Countryside



(e.g., staying on farm, vineyard...)

	Rank (*)	Total themes in survey	% „very suitable“	% „very suitable“, Ø all themes	„very suitable“, population, mn (**)
Average Europe	17	26	19%	24%	-
	20	26	17%	23%	10,2
	15	26	22%	26%	2,8
	21	26	15%	22%	1,0
	23	26	15%	23%	1,0
	14	26	23%	25%	1,9
	24	26	15%	22%	7,1
	14	26	20%	22%	9,8
	14	20	21%	27%	0,8
	15	20	19%	24%	0,8
	12	20	19%	21%	1,3
	14	20	26%	33%	2,0

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.
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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



– Enjoying Nature (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	1	26	4	26
NLA	1	26	1	26
RS	3	26	5	26
SB	3	26	2	26
PS	3	26	7	26
LO	3	26	4	26

General theme interest vs. Luxembourg's theme competence



– **Countryside** (e.g., staying on farm, vineyard...) (Ø DE-NL-CH-AT-BE-FR-UK)

LFT target segments

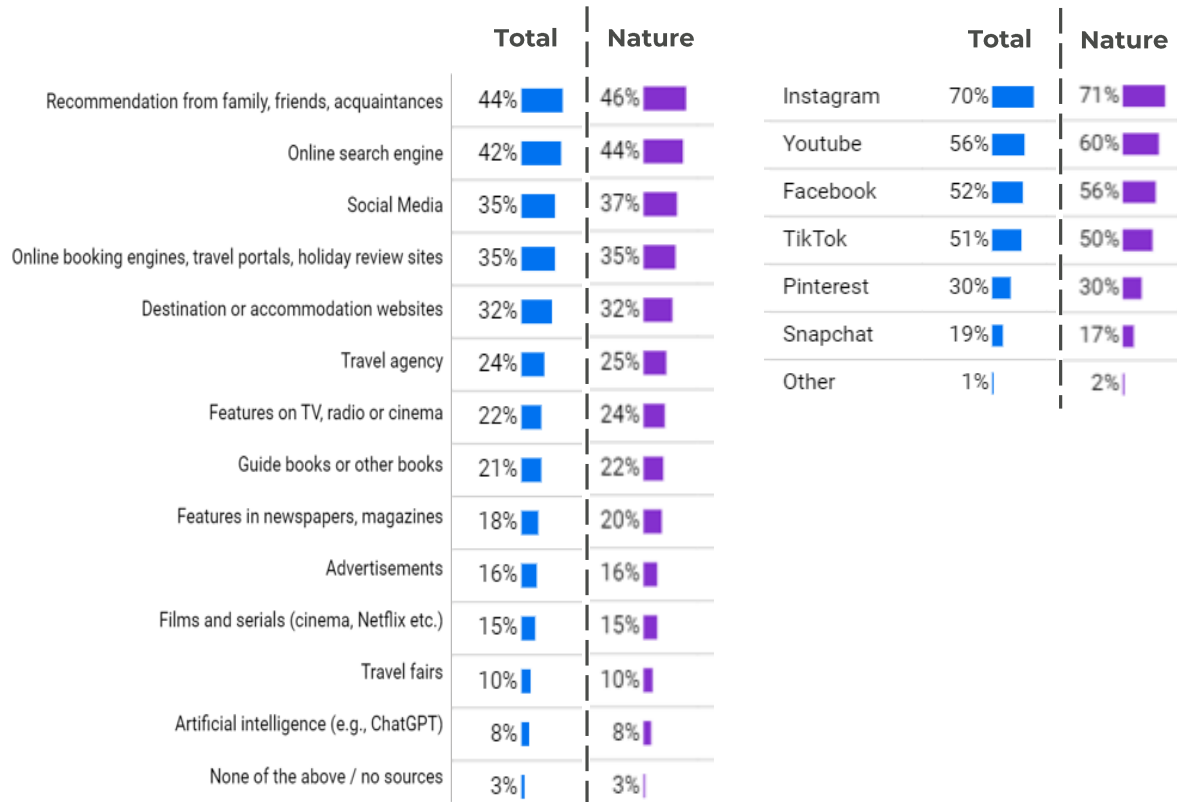
	„Interested“, Rank	<i>Total themes in survey</i>	„Very suitable“, Rank	<i>Total themes in survey</i>
EXP	17	26	16	26
NLA	10	26	13	26
RS	20	26	17	26
SB	14	26	19	26
PS	22	26	18	26
LO	17	26	15	26

Trip organisation and preferences (1) (*)

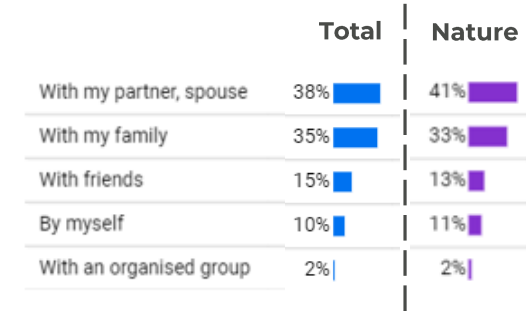
— Average **European source markets**, total vs. travellers interested in nature holidays



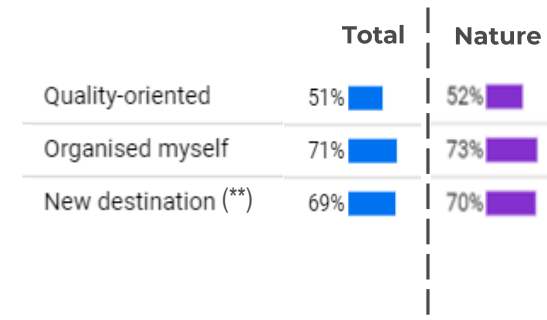
Preferred sources of travel inspiration



Travel party



Quality orientation, self-organisation, new destination



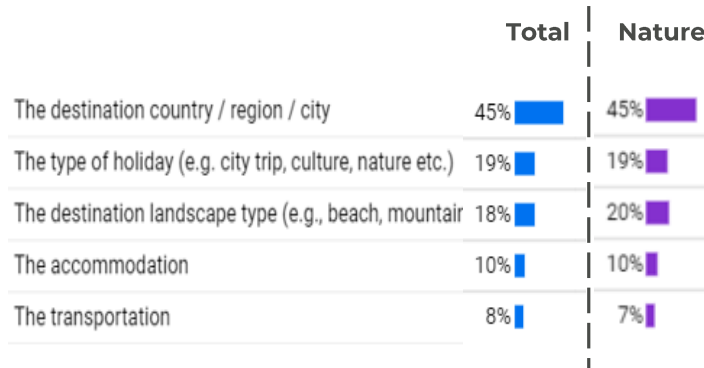
(*) During last outbound holiday trip.
 (**) Travelled to a destination never visited before.

Trip organisation and preferences (2) (*)

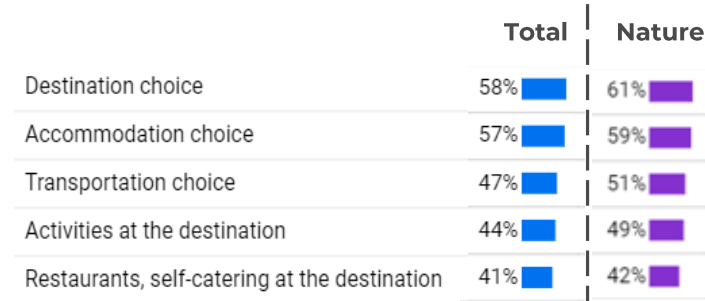
— Average **European source markets**, total vs. travellers interested in nature holidays



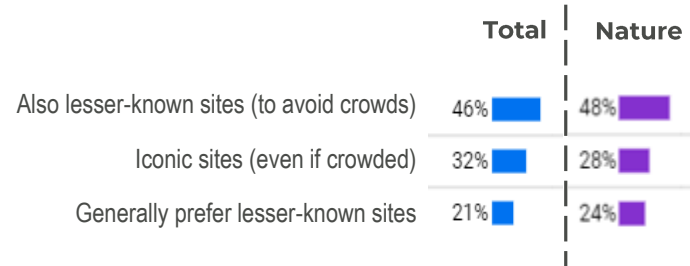
Aspects of trip first decided



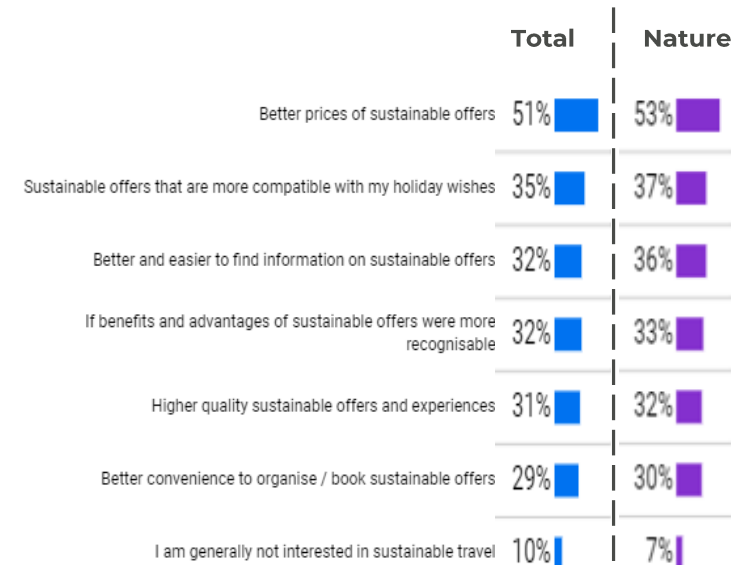
Importance of sustainability for choice of trip components



General preference for visiting iconic vs. lesser-known sites



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



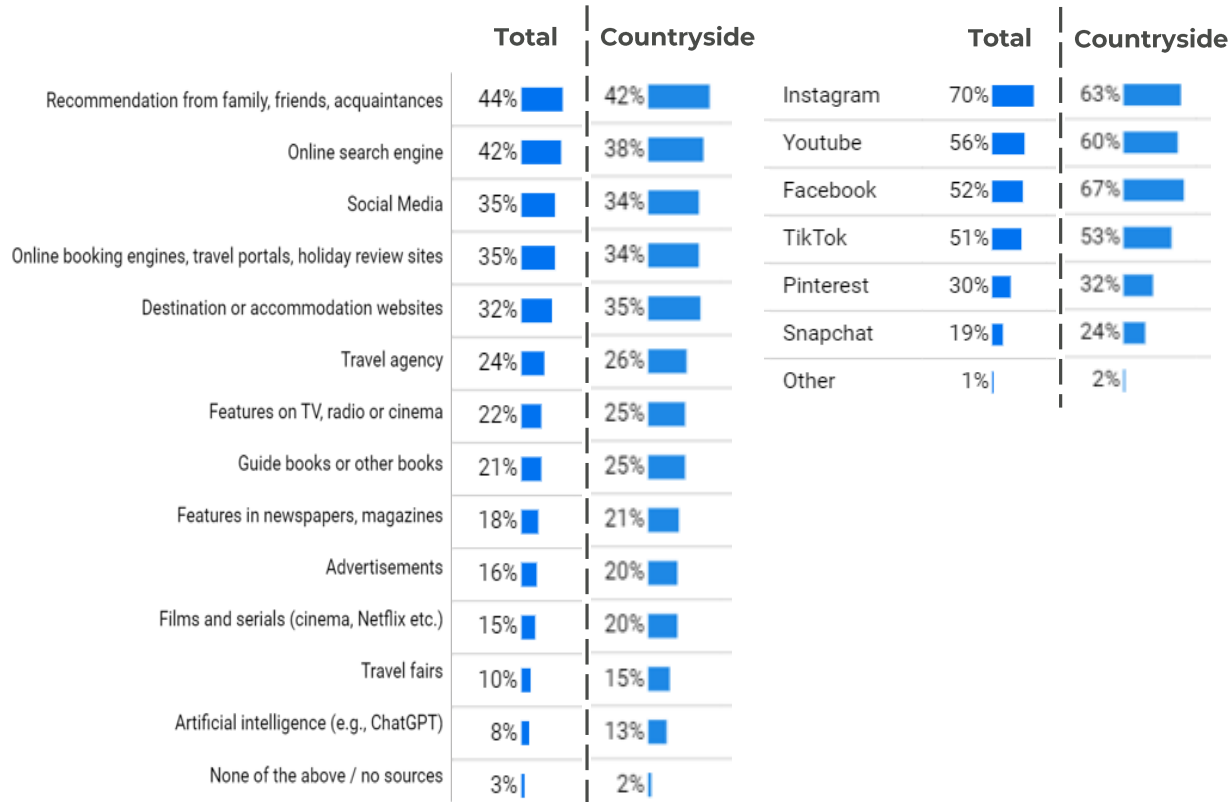
(*) During last outbound holiday trip.

Trip organisation and preferences (1) (*)

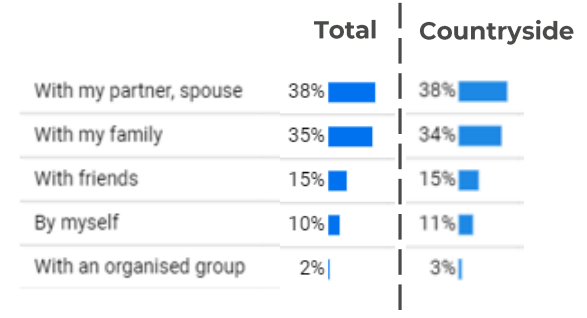
— Average **European source markets**, total vs. travellers interested in countryside holidays



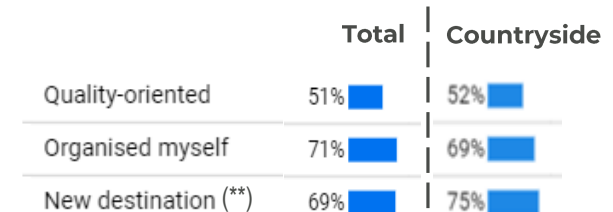
Preferred sources of travel inspiration



Travel party



Quality orientation, self-organisation, new destination



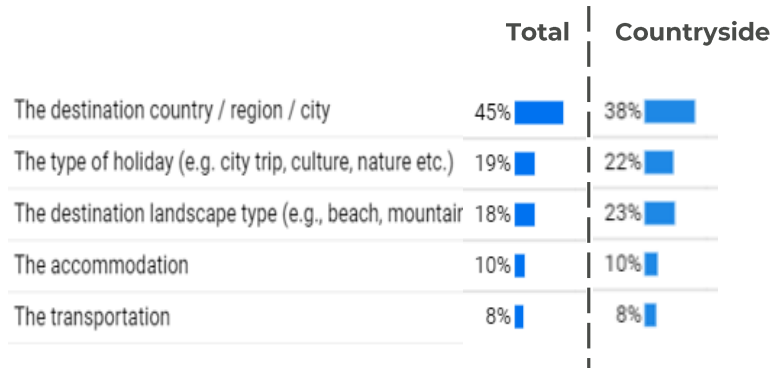
(*) During last outbound holiday trip.
 (**) Travelled to a destination never visited before.

Trip organisation and preferences (2) (*)

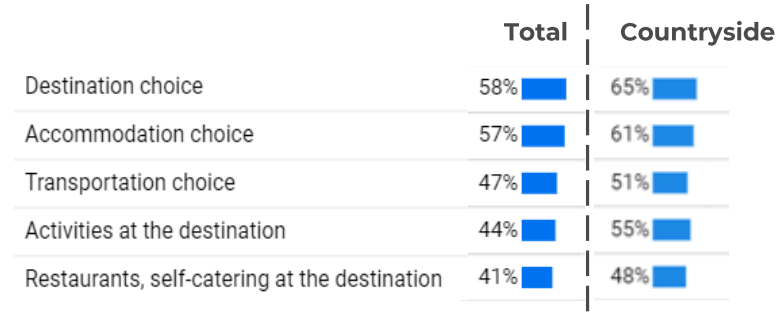
— Average **European source markets**, total vs. travellers interested in countryside holidays



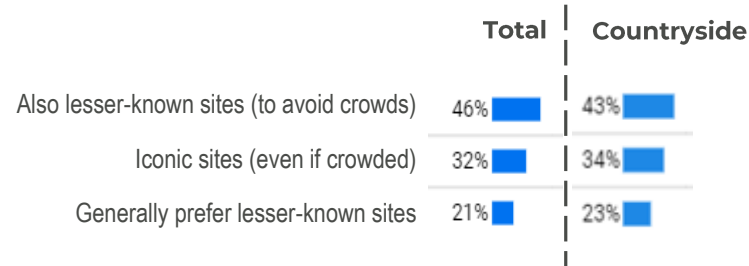
Aspects of trip first decided



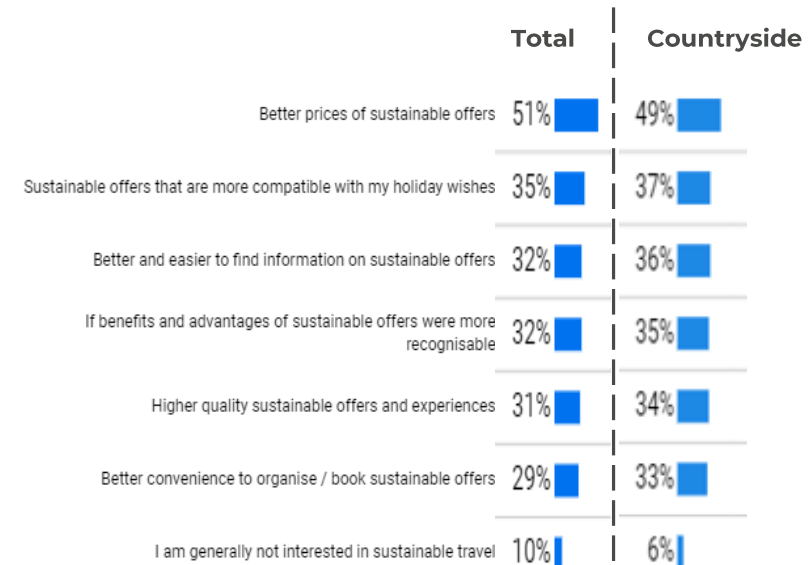
Importance of sustainability for choice of trip components



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

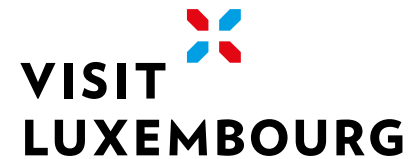


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