

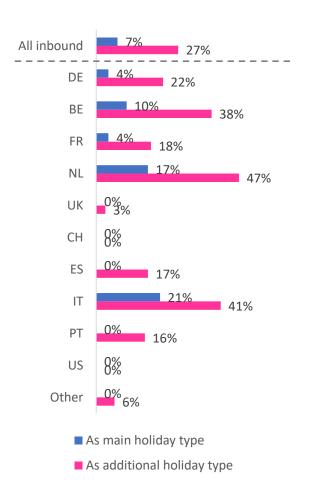


Market size of Nature holidays segment

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

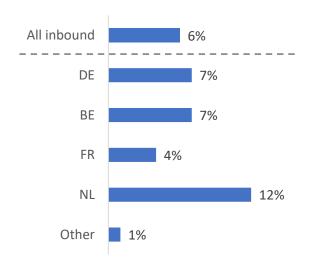
Additional holiday 352.000 (27% of inbound overnight leisure trips to tuxembourg)

Overnight trips : Main holiday	Overnight trips: Additional holiday
7.000	42.000
21.000	87.000
5.000	23.000
54.000	156.000
7.000	44.000
	trips: Main holiday 7.000 21.000 5.000

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





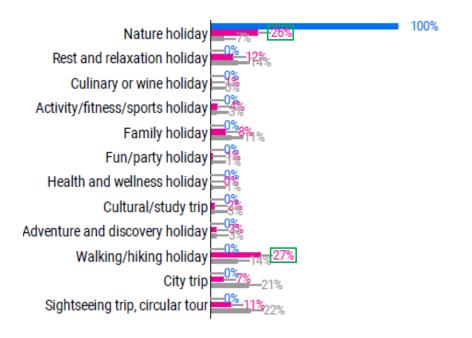


Significantly higher than average

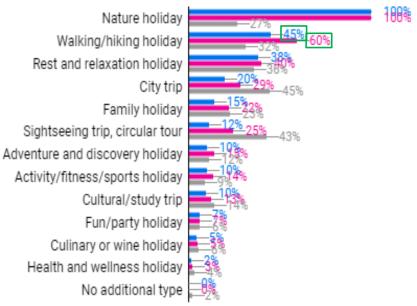
Nature as additional holiday type

All visitors

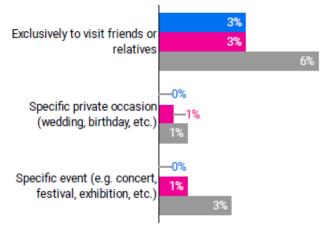
Main holiday types



Additional holiday types



Main purpose of overnight trip (if not holiday)

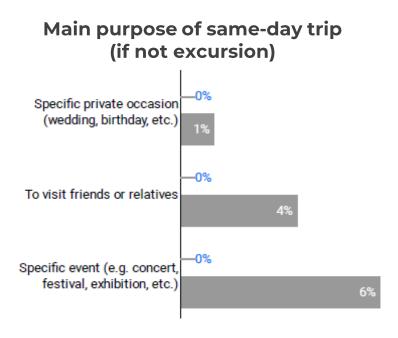


Types of excursions Inbound leisure same-day visitors, 2020-2023



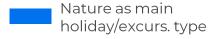
Nature as excursion type

All visitors



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



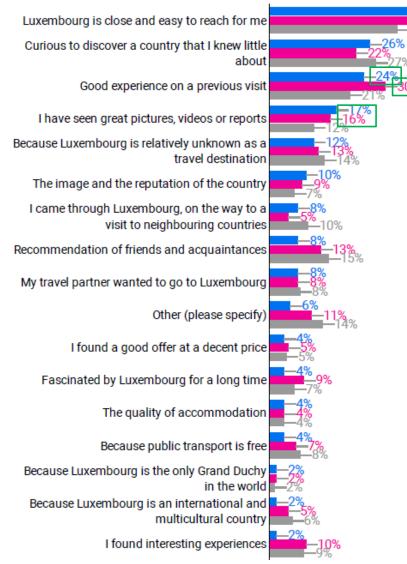


Nature as additional holiday type

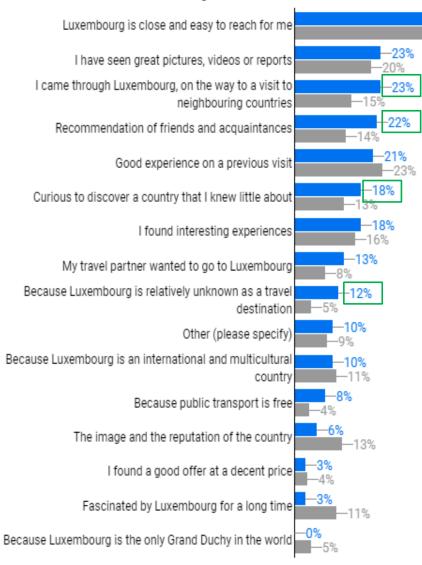
All visitors

Significantly higher than average

Visitors with overnight



Day visitors



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

(*) Maximum 3 answers possible.

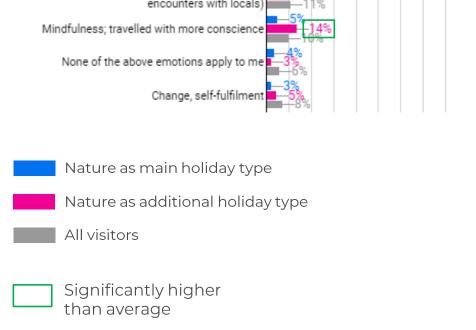
Key travel motives and emotions Inbound leisure visitors with overnight, 2020-2023





None of the above

Connected with nature; consciously experienced Getting away from the daily grind, gathering strength, recharging my Having new experiences and gaining new insights; seeing something Recreation, relaxation, returned rested different, experiencing the local atmosphere I wanted to be able to encounter a variety of different experiences in a small Happiness, well-being Personally enriching travel experience, added Seeing and experiencing as much as possible meaning to my life Tried something new Finally getting some time for myself and my family/friends A defining interpersonal experience (e.g. though I wanted my travel destination to be safe encounters with locals Mindfulness; travelled with more conscience I wanted to be able to communicate easily at my destination None of the above emotions apply to m Having fun and enjoying myself Indulging and spoiling myself Change, self-fulfilmer Submerging myself as deeply as possible in the destination: getting to know the locals, their way of life and their culture Retracing old memories; seeing things again Nature as main holiday type Excitement, action and adventure Nature as additional holiday type Enjoying good weather and a pleasant climate All visitors Travelling as sustainably and ecologically as possible Significantly higher Getting to know new people than average



Inspiration sourcesInbound leisure visitors, 2020-2023



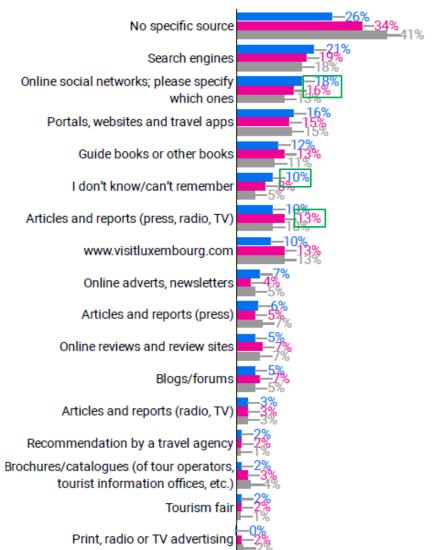


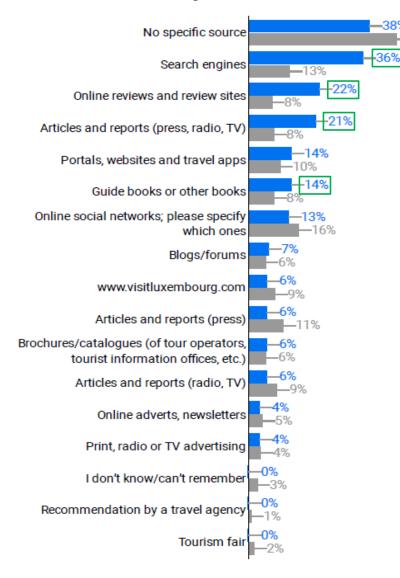
Nature as additional holiday type

All visitors

Significantly higher than average

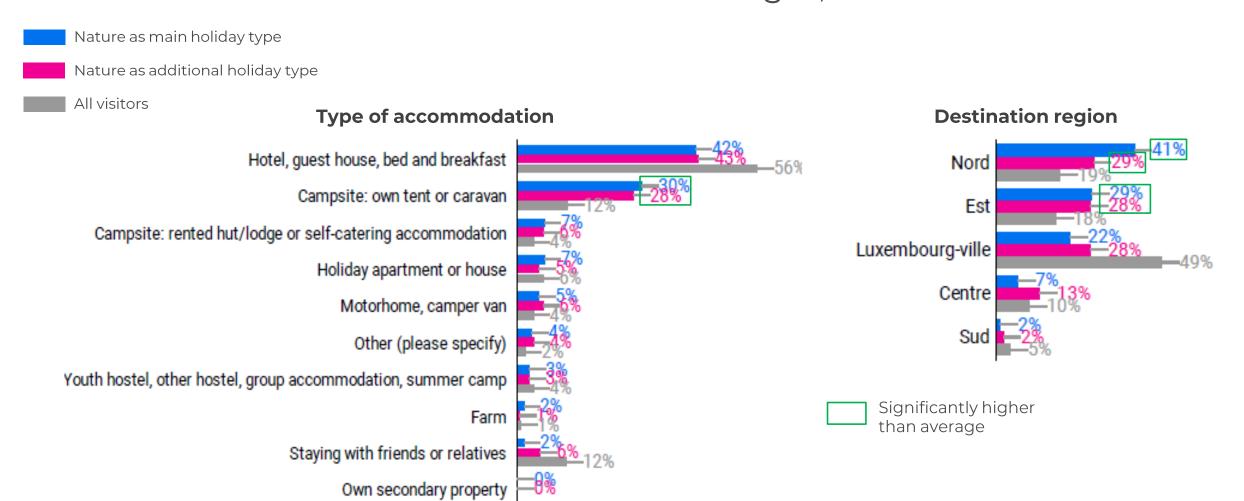
Visitors with overnight





Type of accommodation, destination regions Inbound leisure visitors with overnight, 2020-2023





Target segments Inbound leisure visitors, 2020-2023



EXP – Explorers

NLA – Nature-Loving Actives

RS – Relaxation Seekers

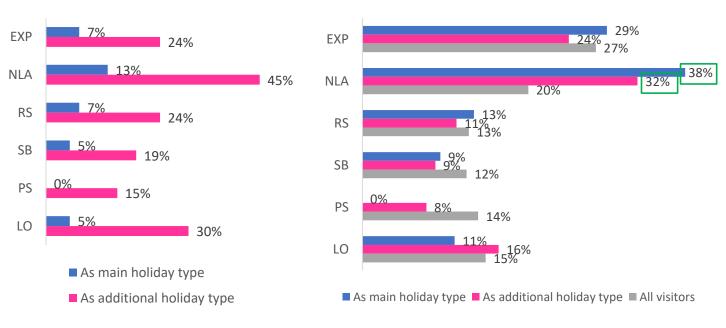
SB - Short Breakers

PS – Perfection Seekers

LO - Leisure Oriented

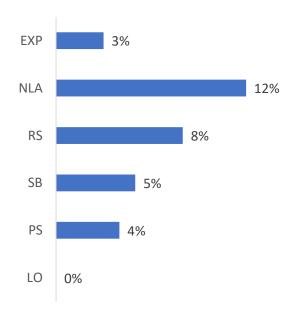
Significantly higher than average

Visitors with overnight



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

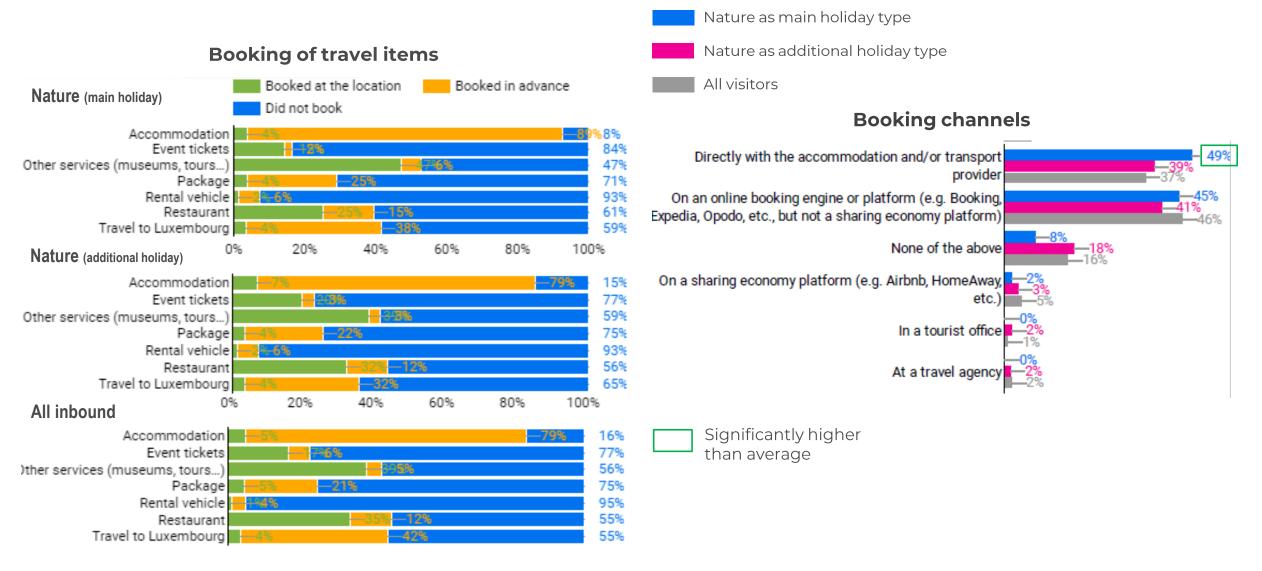
Reading example: 29% of visitors with nature as main holiday type are Explorers



Booking behaviour



Inbound leisure visitors with overnight, 2020-2023



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



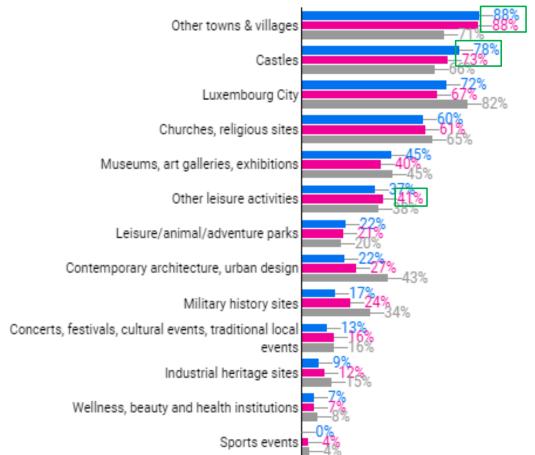


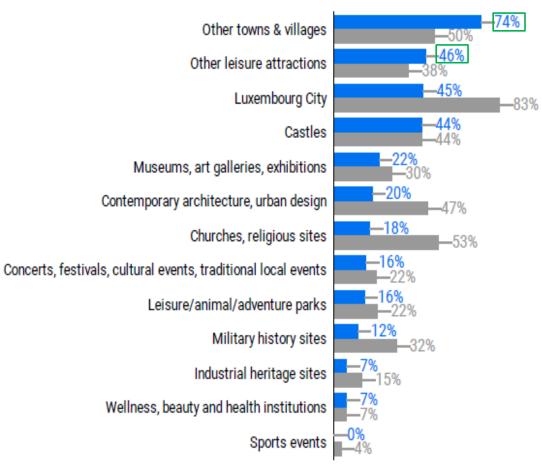
Significantly higher than average

Nature as additional holiday type

All visitors

Visitors with overnight





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



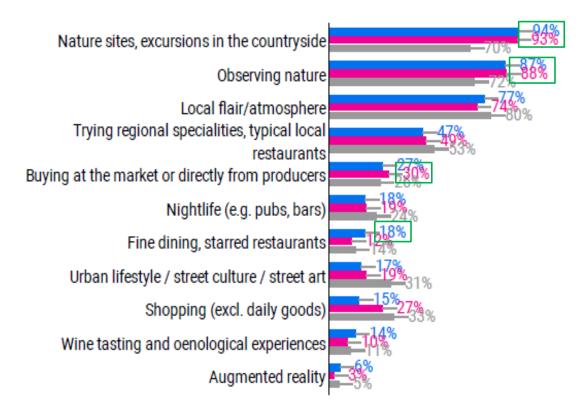
Nature as main holiday/excurs. type

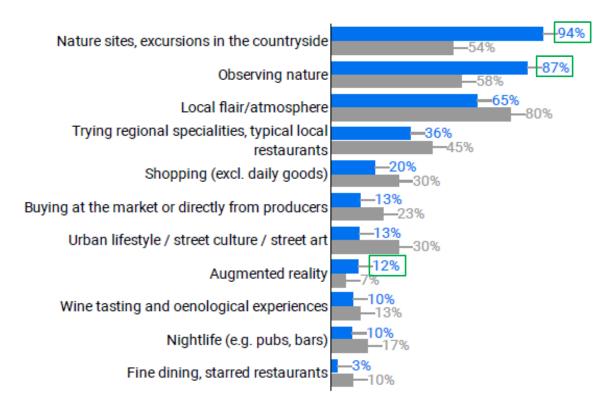
Significantly higher than average

Nature as additional holiday type

All visitors

Visitors with overnight





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



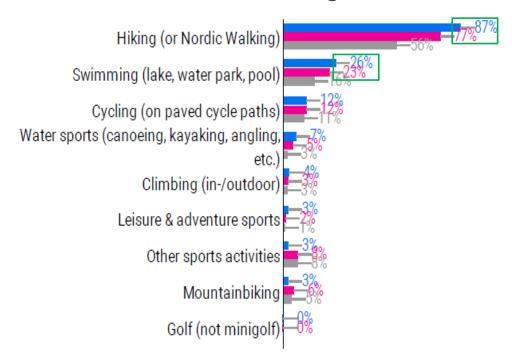
Nature as main holiday/excurs. type

Significantly higher than average

Nature as additional holiday type

All visitors

Visitors with overnight





Age groups Inbound leisure visitors, 2020-2023

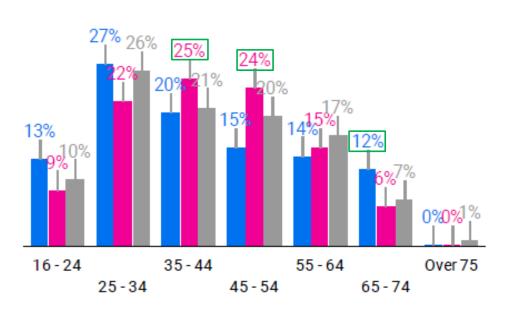


Nature as main holiday/excurs. type

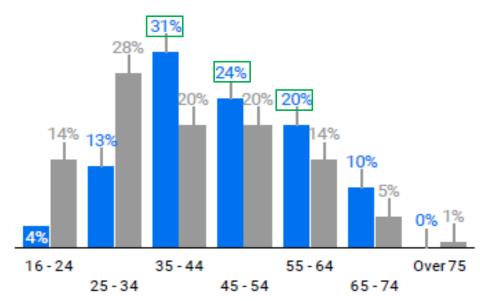
Nature as additional holiday type

All visitors

Visitors with overnight



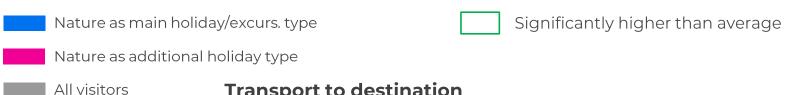




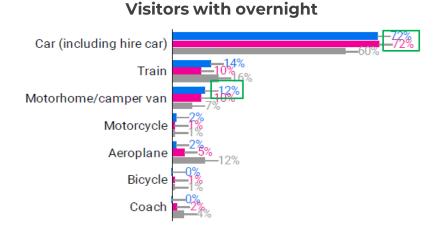
Significantly higher than average

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



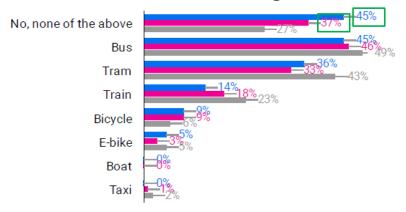


Transport <u>to</u> destination

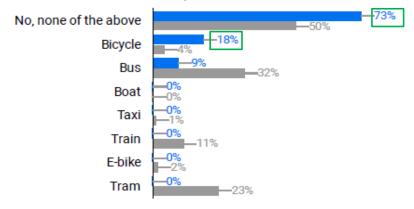




Transport <u>in</u> destination Visitors with overnight







Travel party, repeat visits and cross-border trips Inbound leisure visitors with overnight, 2020-2023



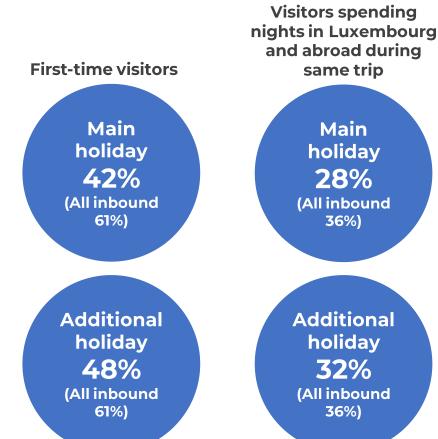




All visitors







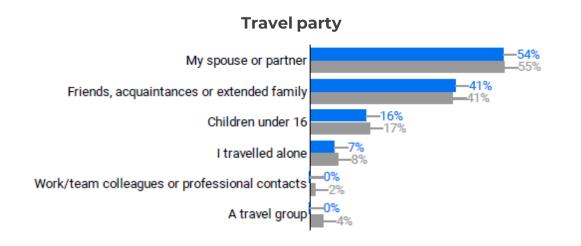
Travel party and repeat visits Inbound leisure same-day visitors, 2020-2023



Nature as excursion type

All visitors

Significantly higher than average



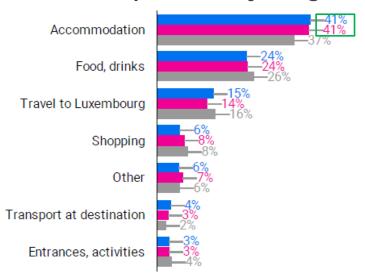


Expenditure, length of stay and quality vs price orientation

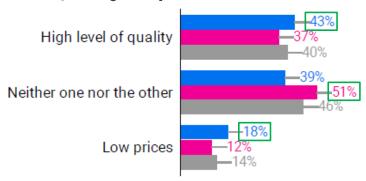








Quality vs. price orientation



Length of stay





Nature as main holiday type







Spend/pers./trip





Spend/pers./day





Expenditure

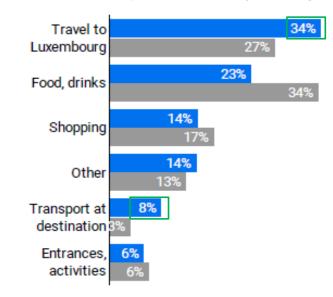




Nature as excursion type

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





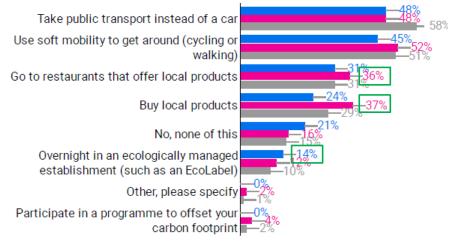
Nature as additional holiday type

Sustainable actions during stay

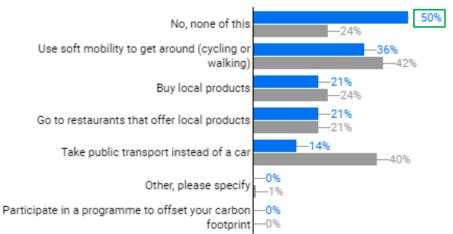
All visitors

Significantly higher than average

Visitors with overnight

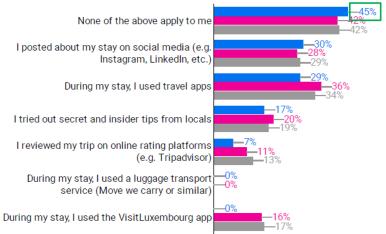


Day visitors

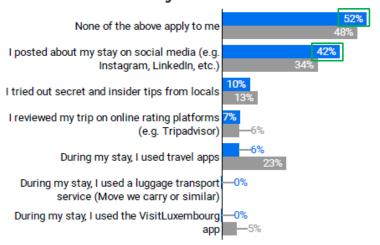


Services used during stay

Visitors with overnight



Day visitors



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

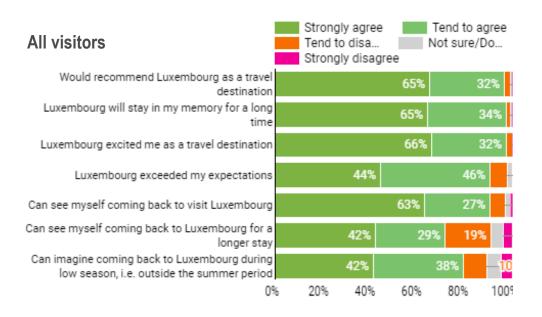
Visitor satisfaction and recommendation Inbound leisure visitors with overnight, 2020-2023





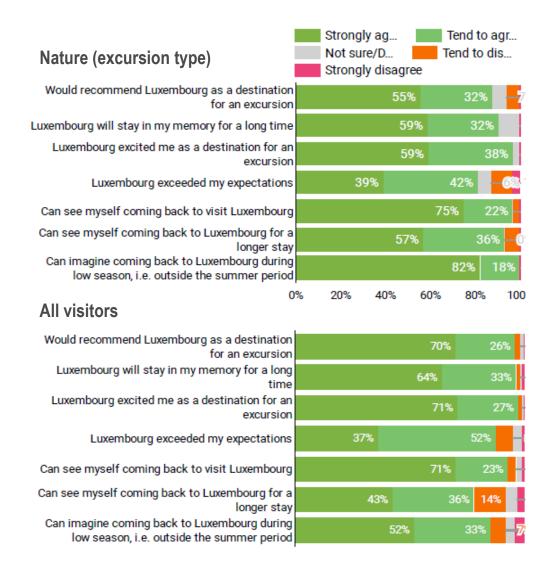
Nature (additional holiday)





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

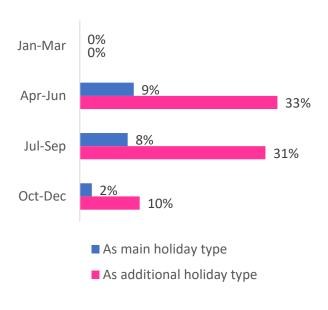


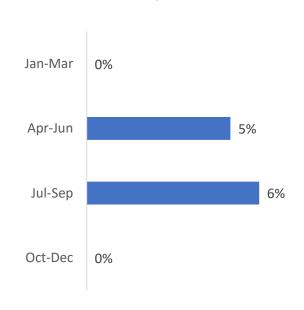


Trip seasonality Inbound leisure visitors, 2020-2023











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
A RES	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

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			
iii.	13	20	-	46%	44%	15,9			
	12	21	-	47 %	47%	13,2			
	17	24	25%	50%	54%	1,8	(*) Rank am	nong all surveyed the	emes in Based o
	16	24	22%	49%	51%	2,0			
+	13	24	22%	52 %	52%	3,8			
(B)	12	24	32%	62 %	60%	4,7			

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	
£100	5	15	28%	25%	9,7	Themes for which Luxembourg is considered most suitable as a holiday
	8	10	21%	27%	5,9	destination, % of respondents agreeing. (*) Rank among all surveyed themes in respective source market.
	6	20	29%	27%	1,0	Based on % "suitable" for theme. (**) Aged 18-74.
	6	20	28%	24%	1,2	n.b. : Further information on theme interest and
	11	20	20%	21%	1,5	Luxembourg's theme competence, e.g. for past visitors and new potential visitors can be found in LFT's Brand &
•	7	20	42 %	33%	3,2	Potential Study report.

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

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.

(**) 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



- Enjoying Nature (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	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

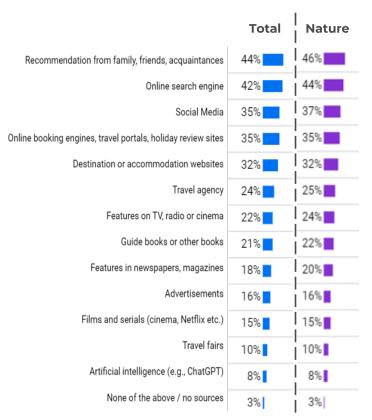
	"Interested", Rank	Total themes in survey	"Very suitable", Rank	Total themes in survey
EXP	17	26	16	26
NLA	10	26	13	26
RS	20	26	17	26
SB	14	26	19	26
PS	22	26	18	26
LO	17	26	15	26

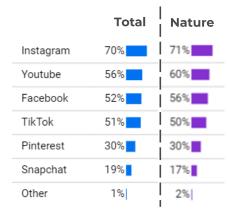
Trip organisation and preferences (1) (*)





Preferred sources of travel inspiration





Travel party

	Total	 Nature
With my partner, spouse	38%	41%
With my family	35%	33%
With friends	15%	13%
By myself	10%	11%
With an organised group	2%	2%

Quality orientation, self-organisation, new destination

	Total	 Nature
Quality-oriented	51%	52%
Organised myself	71%	73%
New destination (**)	69%	70%

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

Trip organisation and preferences (2) (*)

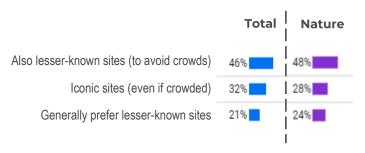




Aspects of trip first decided

	Total	Nature
The destination country / region / city	45%	45%
The type of holiday (e.g. city trip, culture, nature etc.)	19%	19%
The destination landscape type (e.g., beach, mountair	18%	20%
The accommodation	10%	10%
The transportation	8%	7%

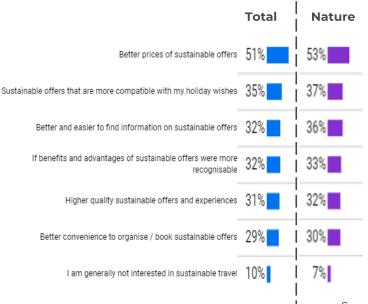
General preference for visiting iconic vs. lesser-known sites



Importance of sustainability for choice of trip components

	Total	Nature
Destination choice	58%	61%
Accommodation choice	57%	59%
Transportation choice	47%	51%
Activities at the destination	44%	49%
Restaurants, self-catering at the destination	41%	42%

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

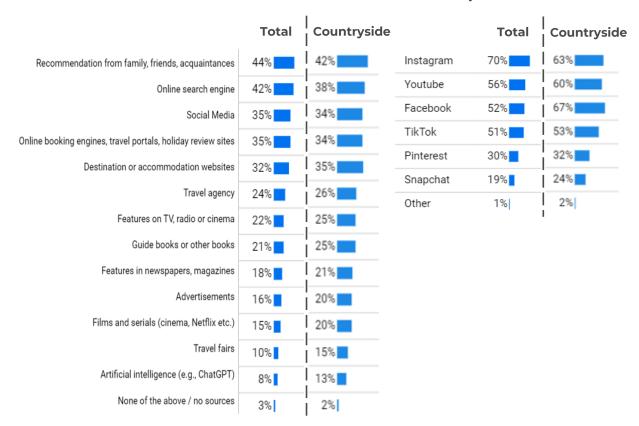


Trip organisation and preferences (1) (*)

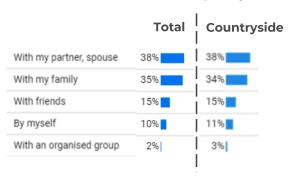


— Average **European source markets**, total vs. travellers interested in countryside holidays

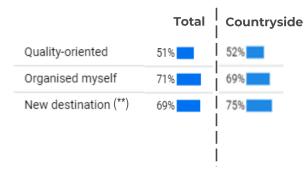
Preferred sources of travel inspiration



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) (*)

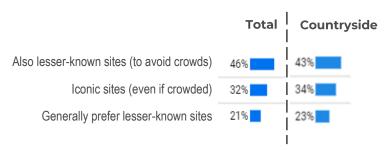


— Average **European source markets**, total vs. travellers interested in countryside holidays

Aspects of trip first decided

	Total	Countryside
The destination country / region / city	45%	38%
The type of holiday (e.g. city trip, culture, nature etc.)	19%	22%
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The transportation	8%	8%

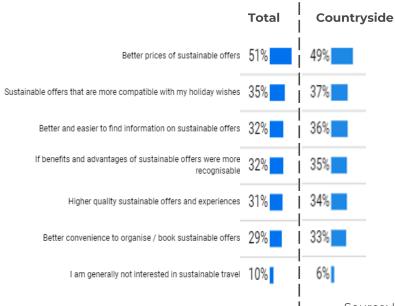
General preference for visiting iconic vs. lesser-known sites



Importance of sustainability for choice of trip components

	Total	Countryside
Destination choice	58%	65%
Accommodation choice	57%	61%
Transportation choice	47%	51%
Activities at the destination	44%	55%
Restaurants, self-catering at the destination	41%	48%

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





Your contact



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



Luxembourg for Tourism GIE 6, rue Antoine de Saint-Exupéry L-1432 Luxembourg-Kirchberg www.visitluxembourg.com