



Luxembourg for Tourism

Theme profile

QUALITY-ORIENTED

2023



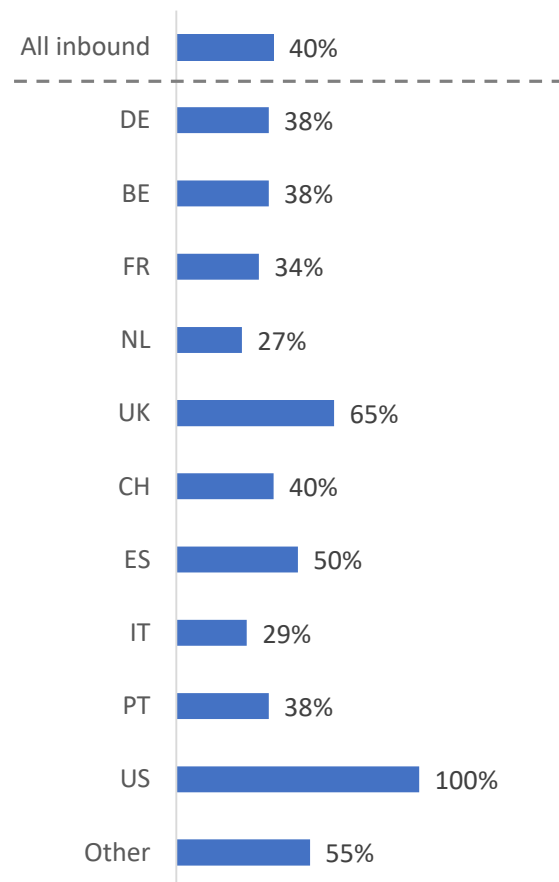
Market size of Quality-oriented traveller segment

Volume of quality-oriented visitor segment among leisure visitors in Luxembourg

Overnight trips



Share of quality-oriented leisure visitors, by source markets



Number of overnight trips to Luxembourg (estimate 2023)

Quality-oriented
521.000
(40%
of inbound
overnight
leisure trips to
Luxembourg)

	Overnight trips: Quality-oriented visitors
DE	73.000
BE	87.000
FR	44.000
NL	89.000
Other	228.000



Travel behaviour of Quality-oriented visitors in Luxembourg

Holiday types

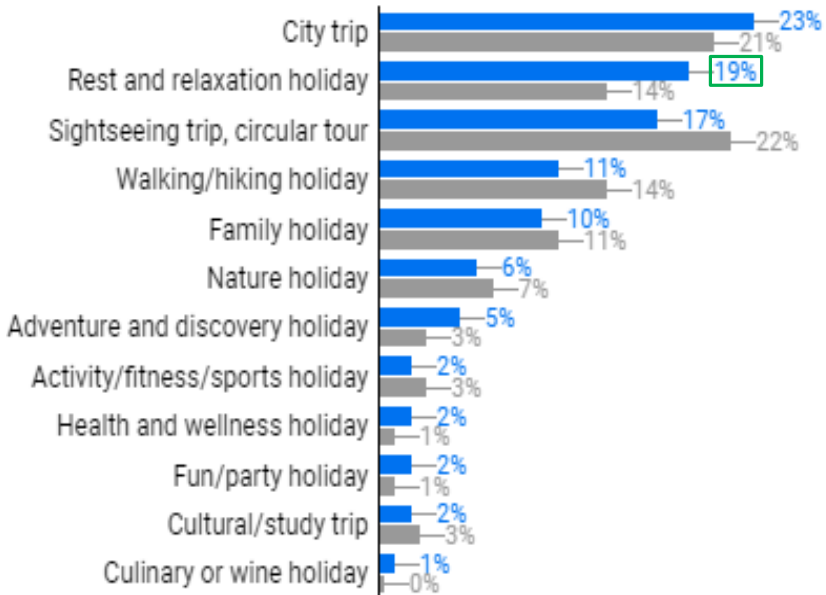
Inbound leisure visitors with overnight, 2020-2023



Quality-oriented
All visitors

Significantly higher than average

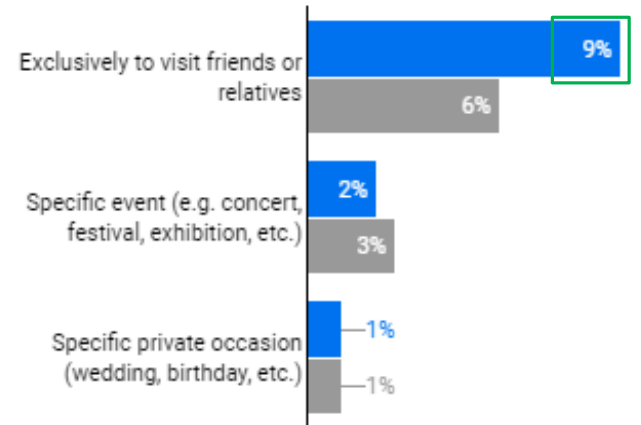
Main holiday types



Additional holiday types



Main purpose of overnight trip (if not holiday)



Key decision criteria for choosing Luxembourg (*)

Inbound leisure visitors, 2020-2023

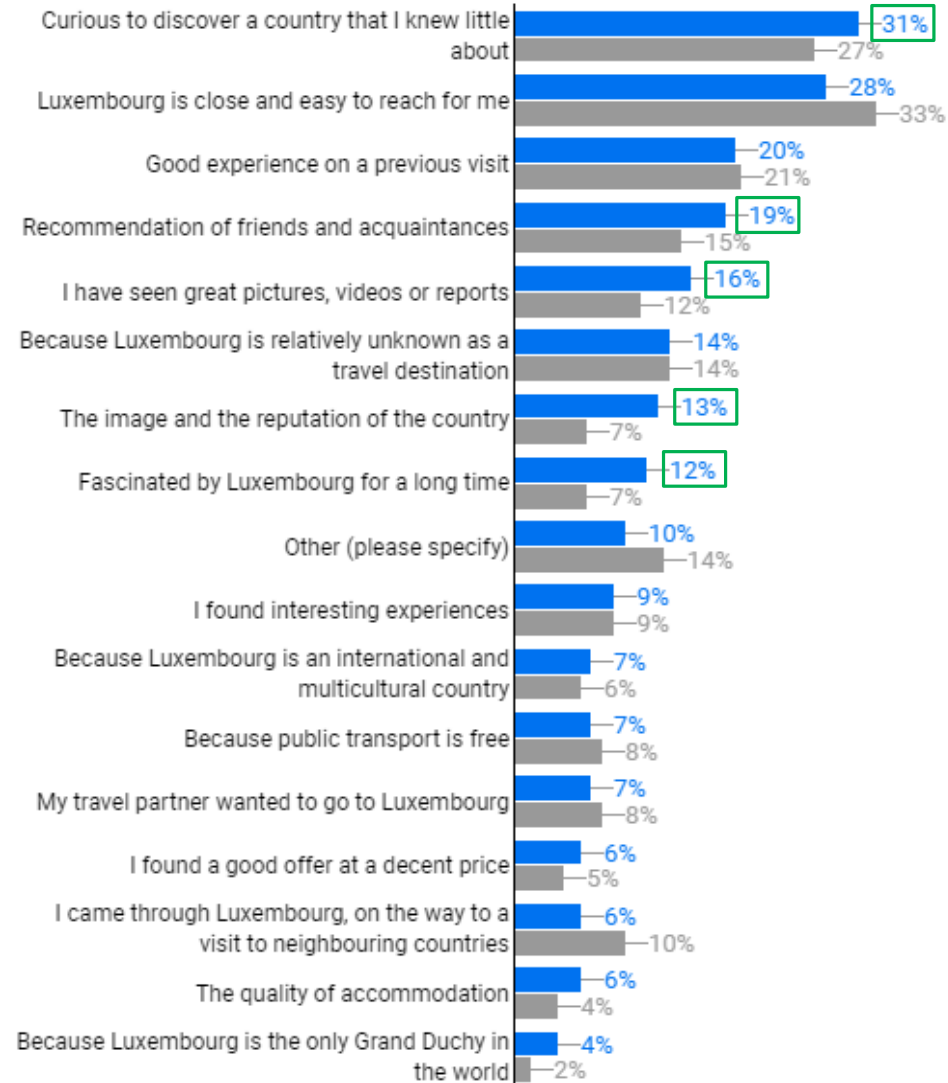


Quality-oriented

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



Quality-oriented

All visitors

Significantly higher than average

Inspiration sources

Inbound leisure visitors, 2020-2023



Quality-oriented

All visitors

Significantly higher than average

Visitors with overnight



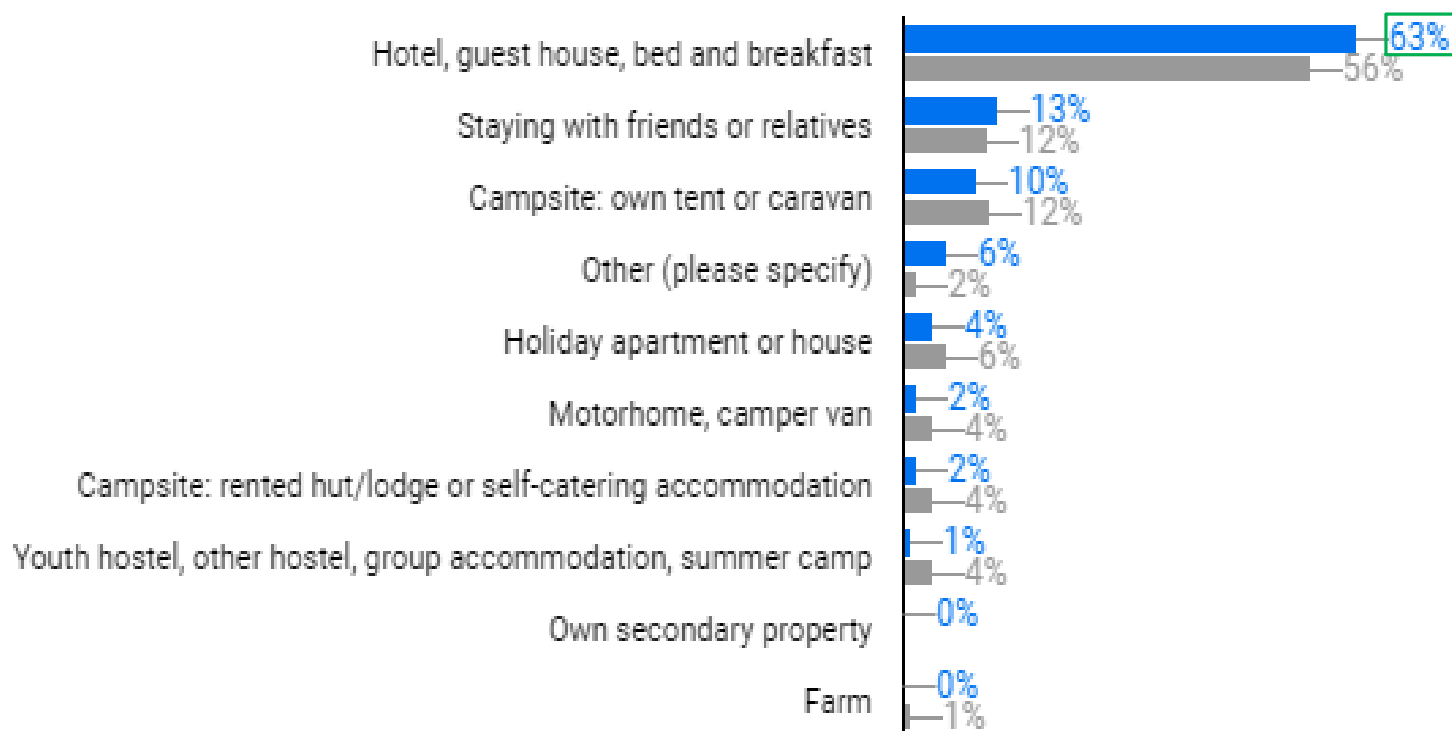
Type of accommodation, destination regions

Inbound leisure visitors with overnight, 2020-2023

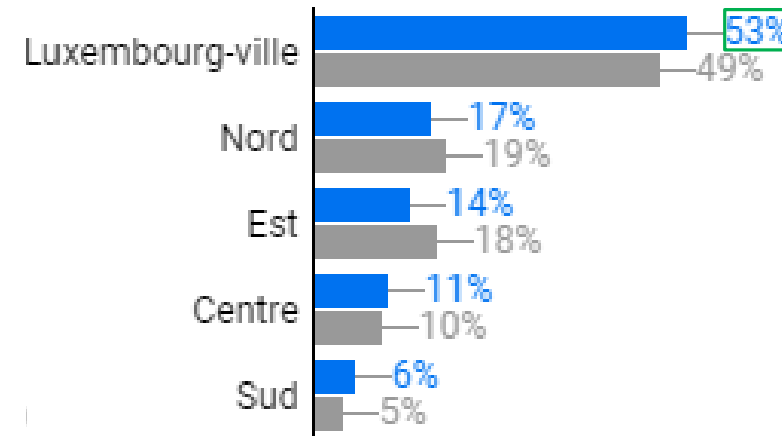


Quality-oriented
All visitors

Type of accommodation



Destination region



Significantly higher than average



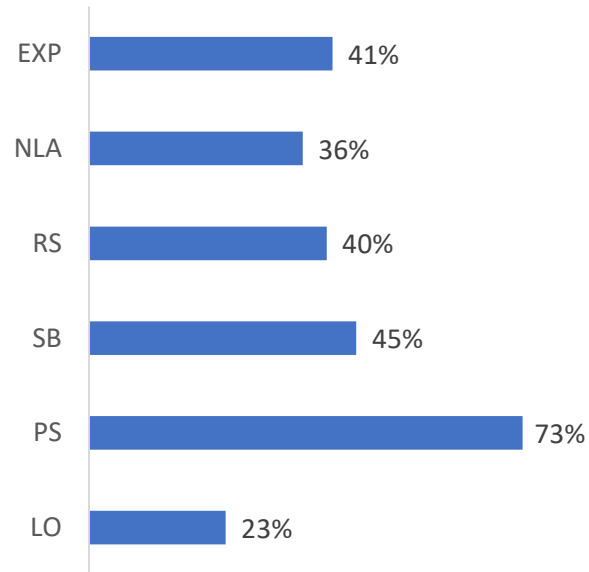
Target segments

Inbound leisure visitors, 2020-2023

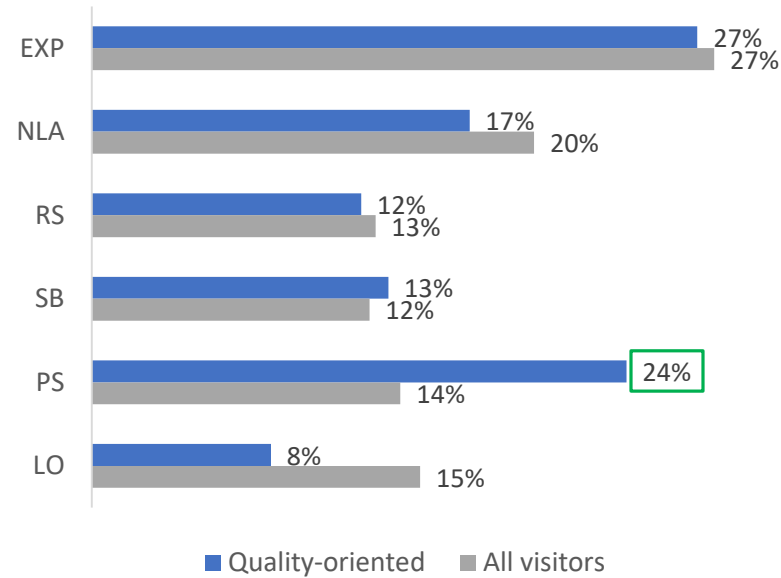
EXP – Explorers
NLA – Nature-Loving Actives
RS – Relaxation Seekers
SB – Short Breakers
PS – Perfection Seekers
LO – Leisure Oriented

 Significantly higher than average

Visitors with overnight



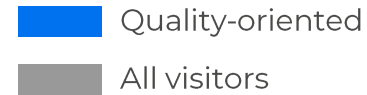
Reading example: 41% of Explorers are quality-oriented



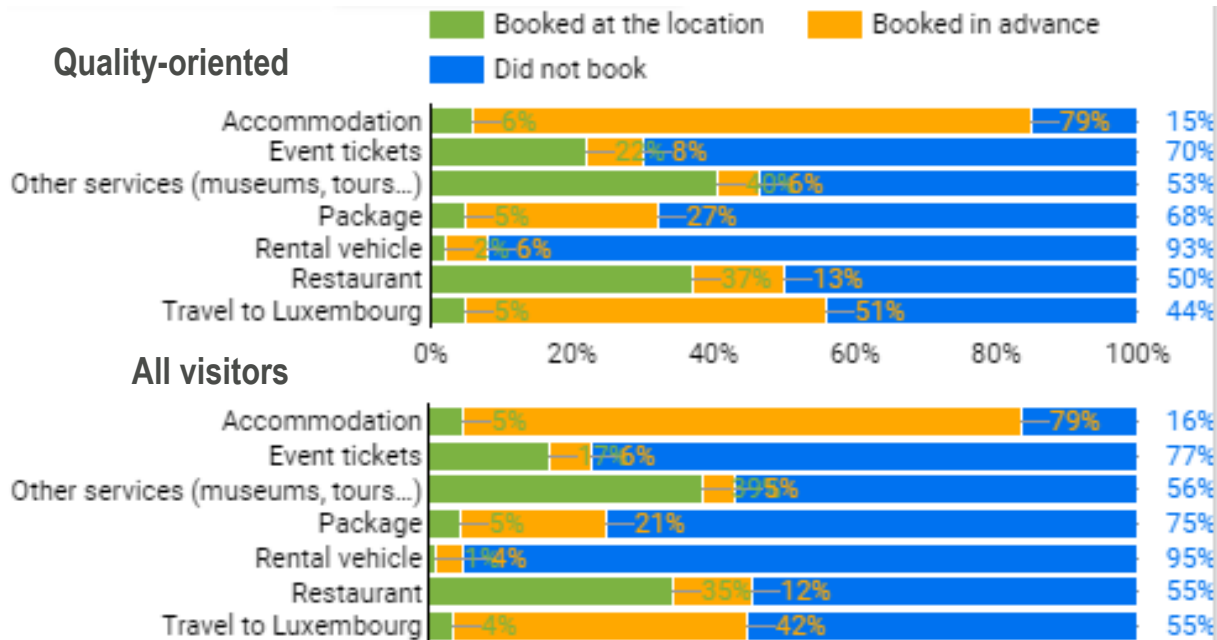
Reading example: 27% of quality-oriented visitors are Explorers

Booking behaviour

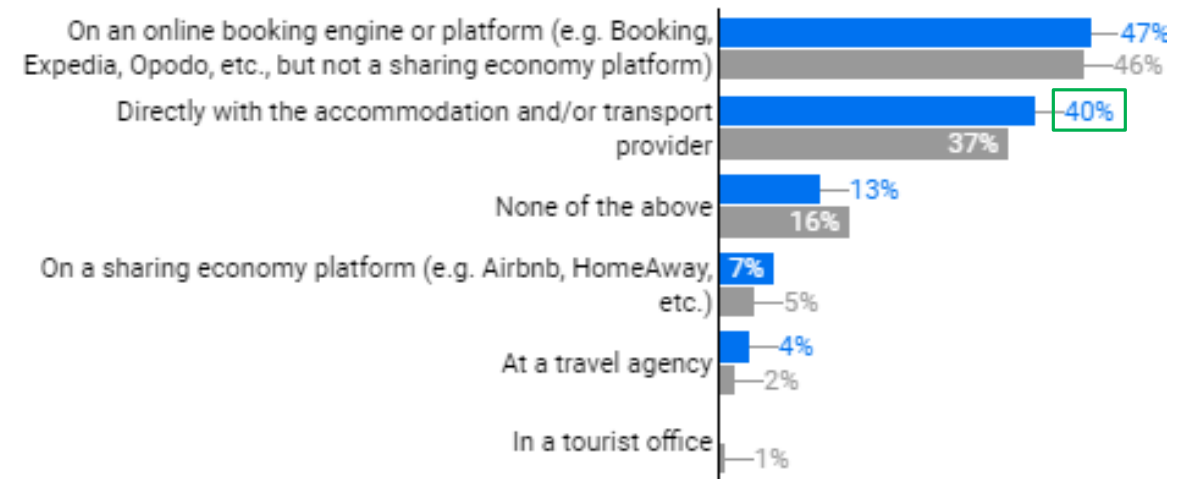
Inbound leisure visitors with overnight, 2020-2023



Booking of travel items



Booking channels



40% Significantly higher than average

Places visited during leisure stays

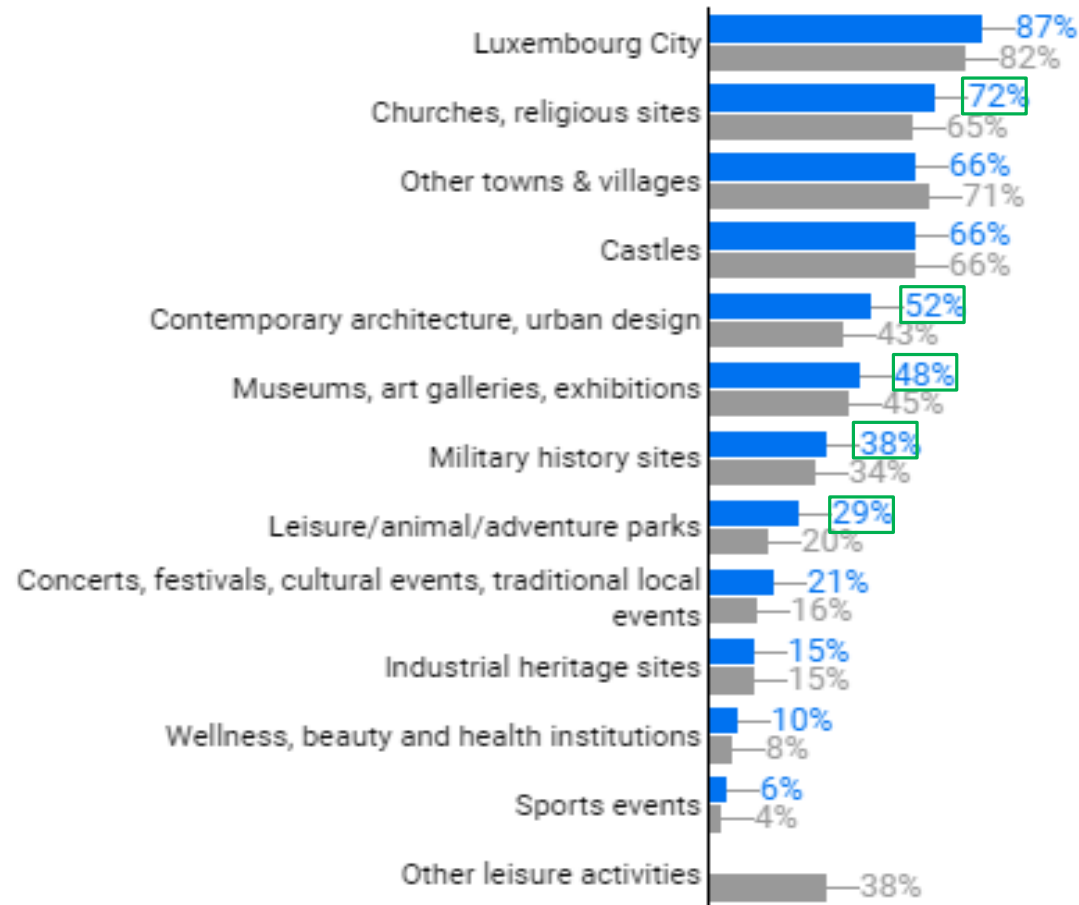
Inbound leisure visitors, 2020-2023



Quality-oriented
All visitors

Significantly higher than average

Visitors with overnight





Non-sporting activities undertaken during leisure stays

Inbound leisure visitors, 2020-2023

Quality-oriented
All visitors

Significantly higher than average

Visitors with overnight



Sporting activities undertaken during leisure stays

Inbound leisure visitors, 2020-2023



Quality-oriented
All visitors

Significantly higher than average

Visitors with overnight





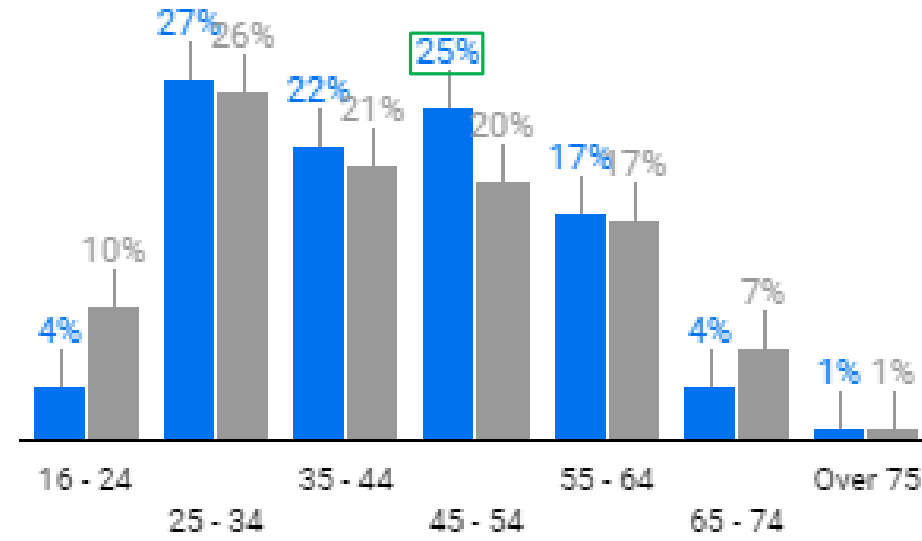
Source: LFT/Ilres Visitor Survey, 2020-2023.



Age groups

Inbound leisure visitors, 2020-2023

 Quality-oriented
 All visitors



 Significantly higher than average

Transport (to and in destination)

Inbound leisure visitors, 2020-2023

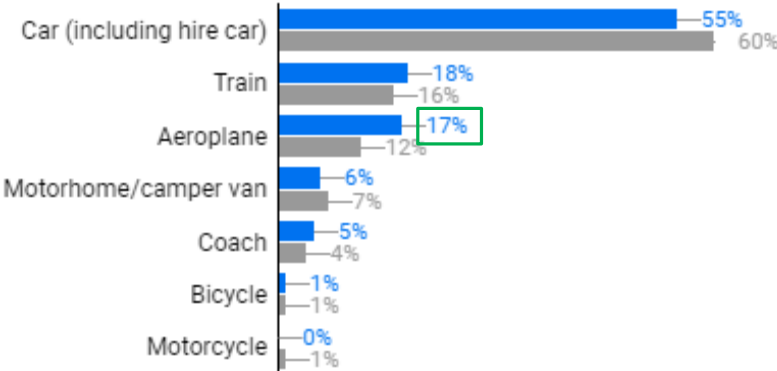


Quality-oriented
All visitors

Significantly higher than average

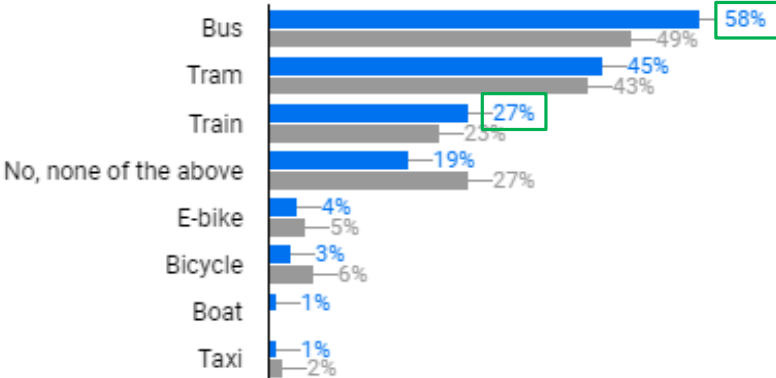
Transport to destination

Visitors with overnight



Transport in destination

Visitors with overnight



Travel party, repeat visits and cross-border trips

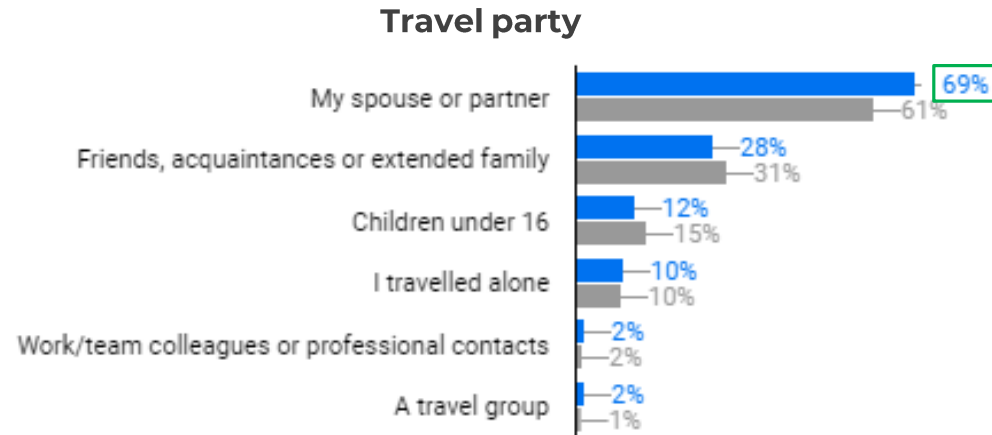
Inbound leisure visitors with overnight, 2020-2023



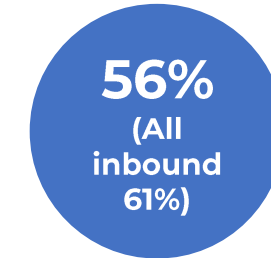
Quality-oriented

All visitors

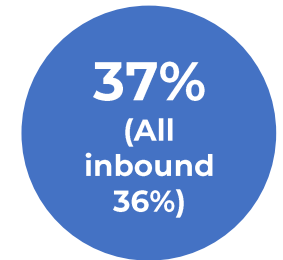
Significantly higher than average



First-time visitors



Visitors spending nights in Luxembourg and abroad during same trip

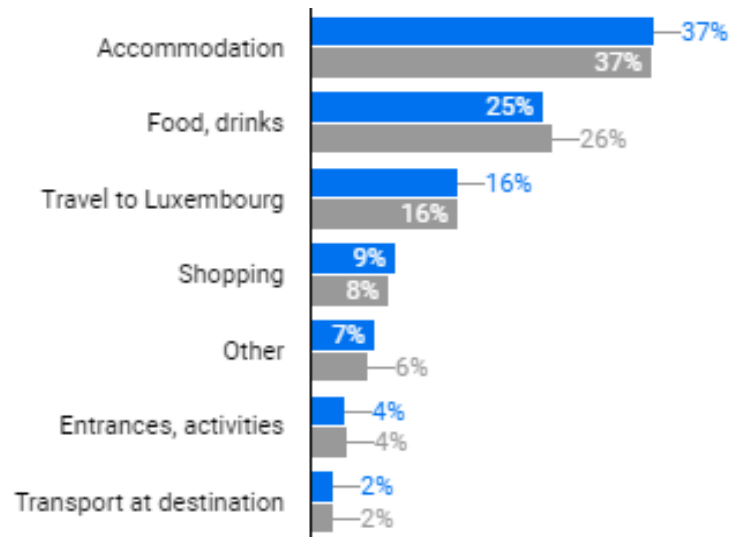




Expenditure, length of stay and quality vs price orientation

Inbound leisure visitors with overnight, 2020-2023



Breakdown of expenditure by categories



 Quality-oriented
 All visitors

 Significantly higher than average

Length of stay



Spend/pers./trip



Spend/pers./day



Actions during stay (sustainable and services)

Inbound leisure visitors, 2020-2023



■ Quality-oriented
■ All visitors

 Significantly higher than average

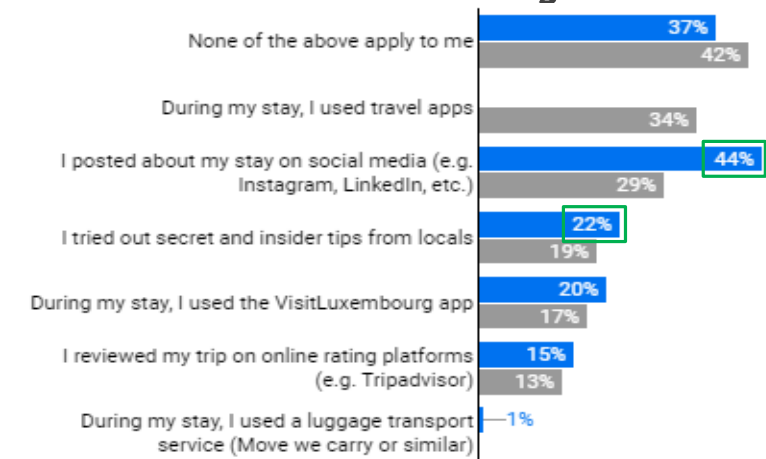
Sustainable actions during stay

Visitors with overnight



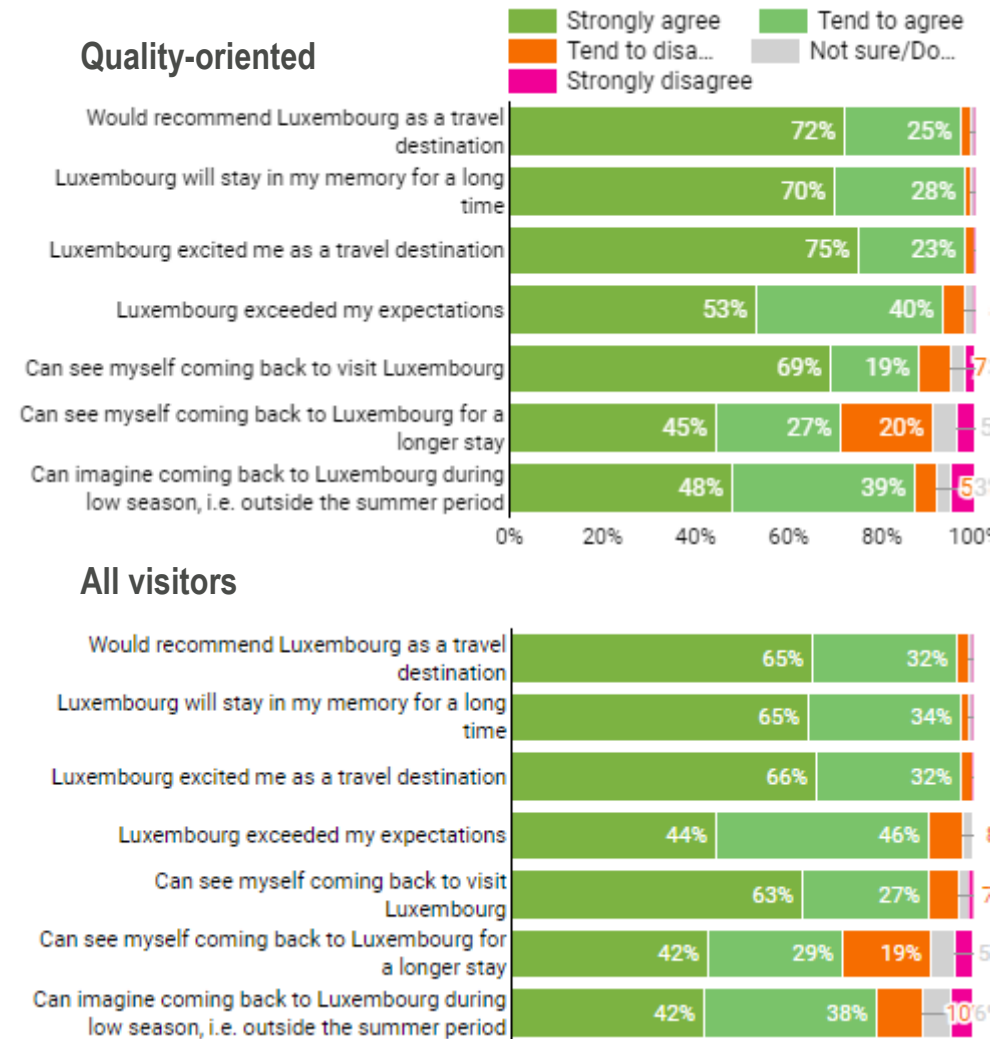
Services used during stay

Visitors with overnight



Visitor satisfaction and recommendation

Inbound leisure visitors with overnight, 2020-2023

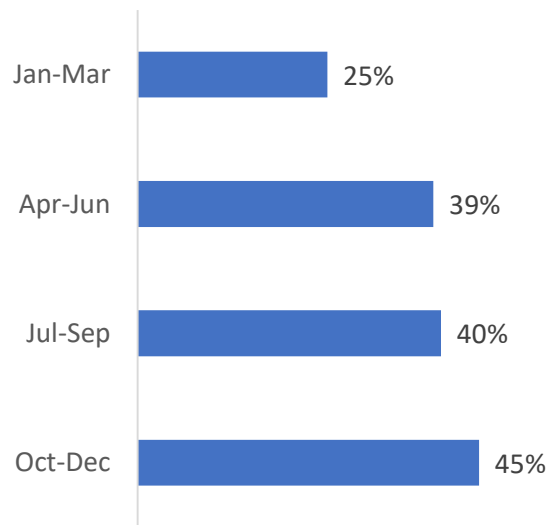


Trip seasonality

Inbound leisure visitors, 2020-2023



Visitors with overnight





Growth Potential for Quality-oriented travellers segment

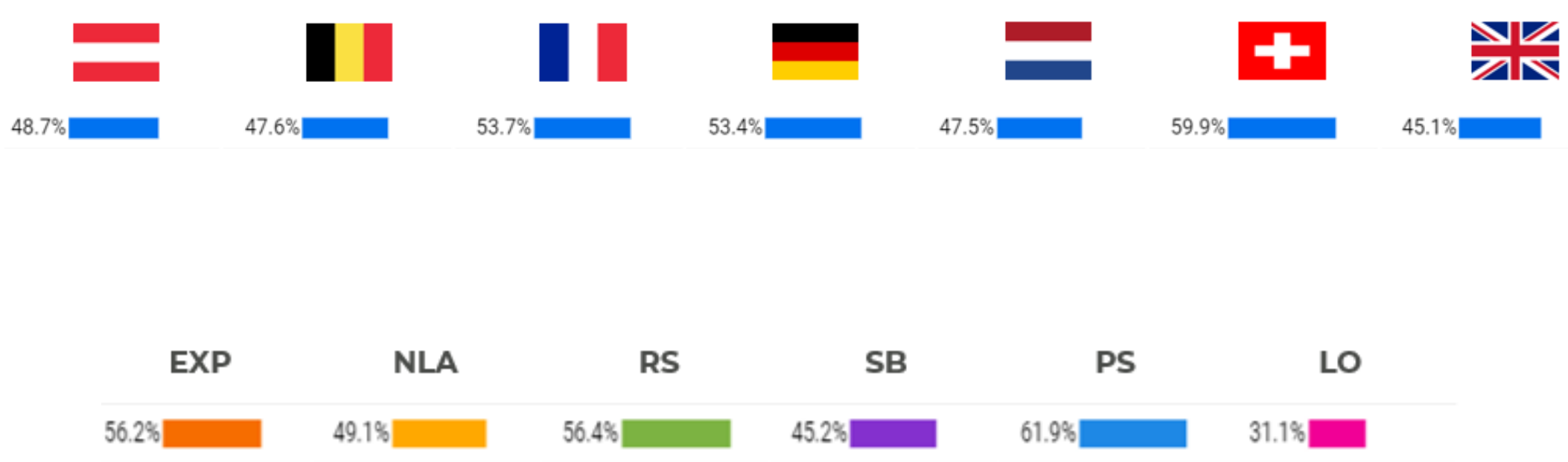
Share of quality-oriented travellers

By source markets & by LFT target segments



Average Europe

50.8%

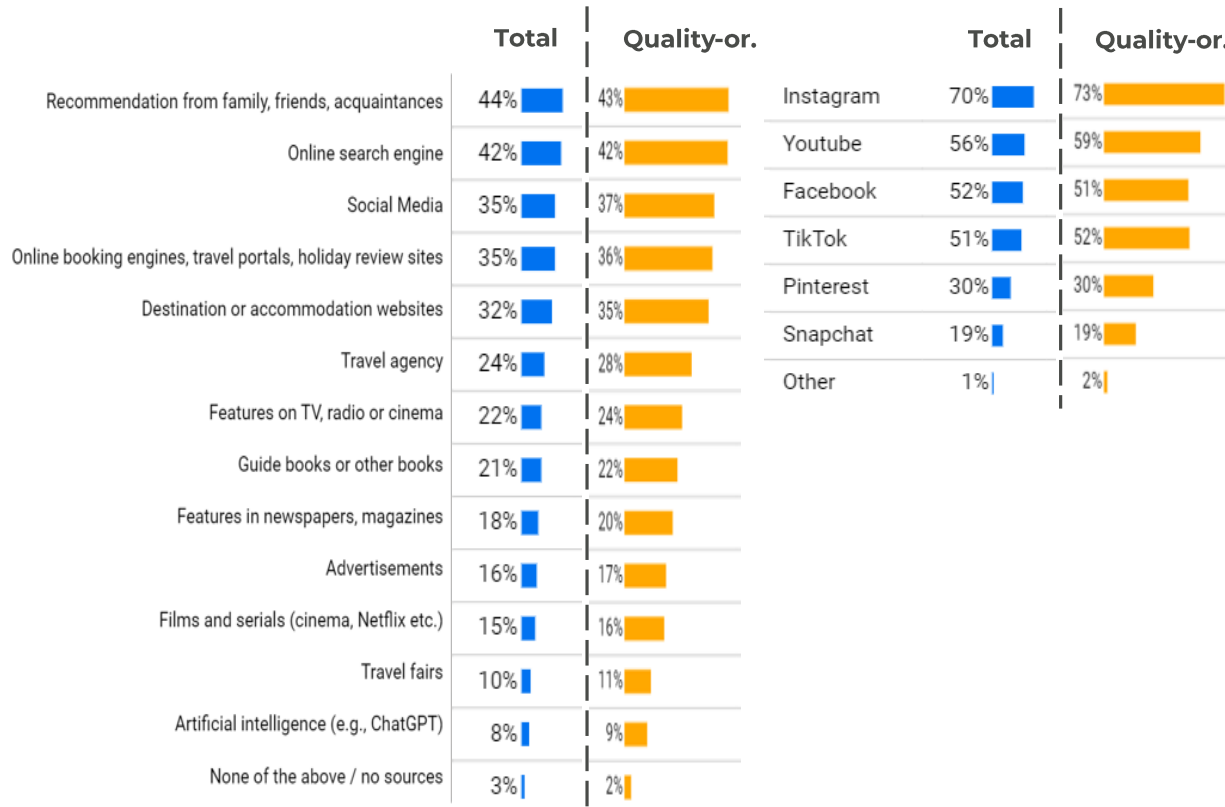


Trip organisation and preferences (1) (*)

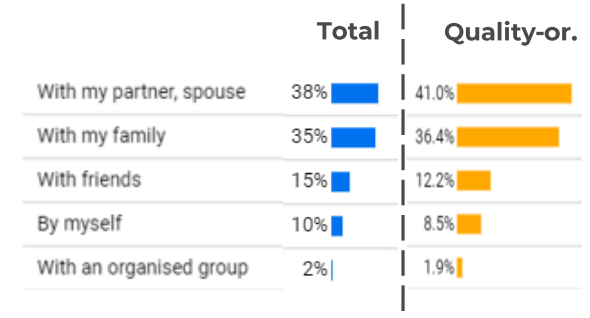
— Average **European source markets**, total vs. quality-oriented travellers



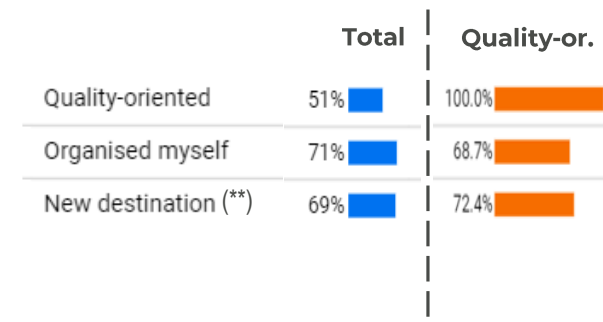
Preferred sources of travel inspiration



Travel party



Quality orientation, self-organisation, new destination



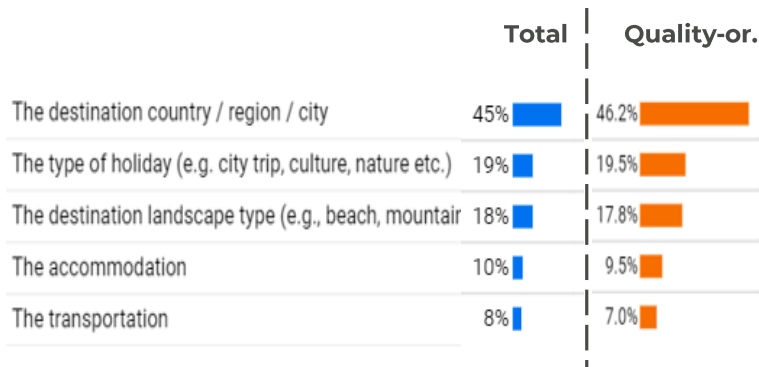
(*) During last outbound holiday trip.
 (**) Travelled to a destination never visited before.

Trip organisation and preferences (2) (*)

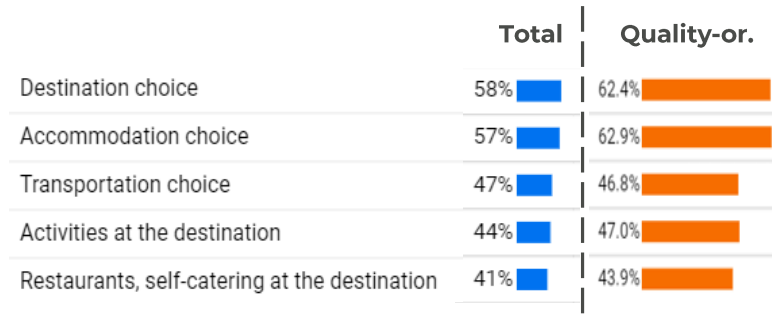
— Average **European source markets**, total vs. quality-oriented travellers



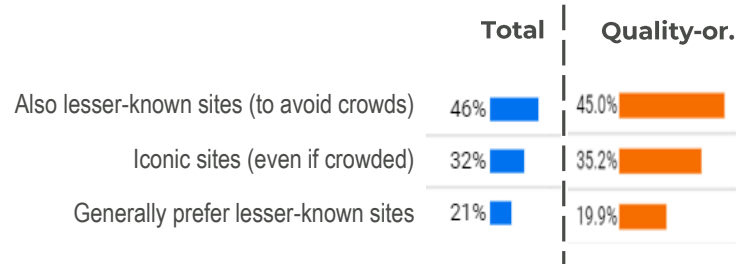
Aspects of trip first decided



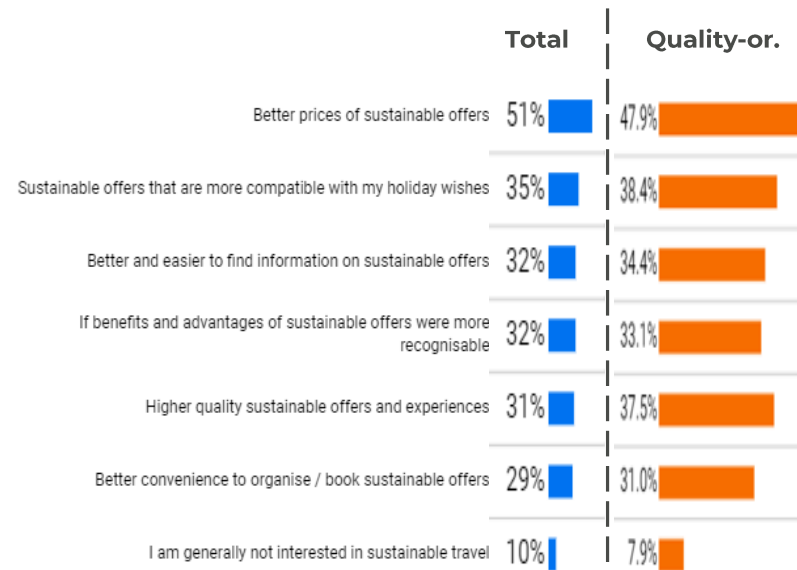
Importance of sustainability for choice of trip components



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

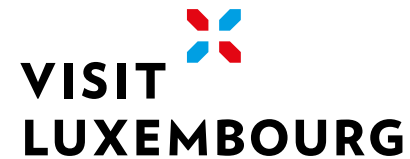


Alain Krier

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