



LfT Visitor Survey:

Focus on Specific Transport Means:
Camping Cars – Motorbike – Railway

Leisure Visitors travelling to Luxembourg by motorbike, camping-car or railway

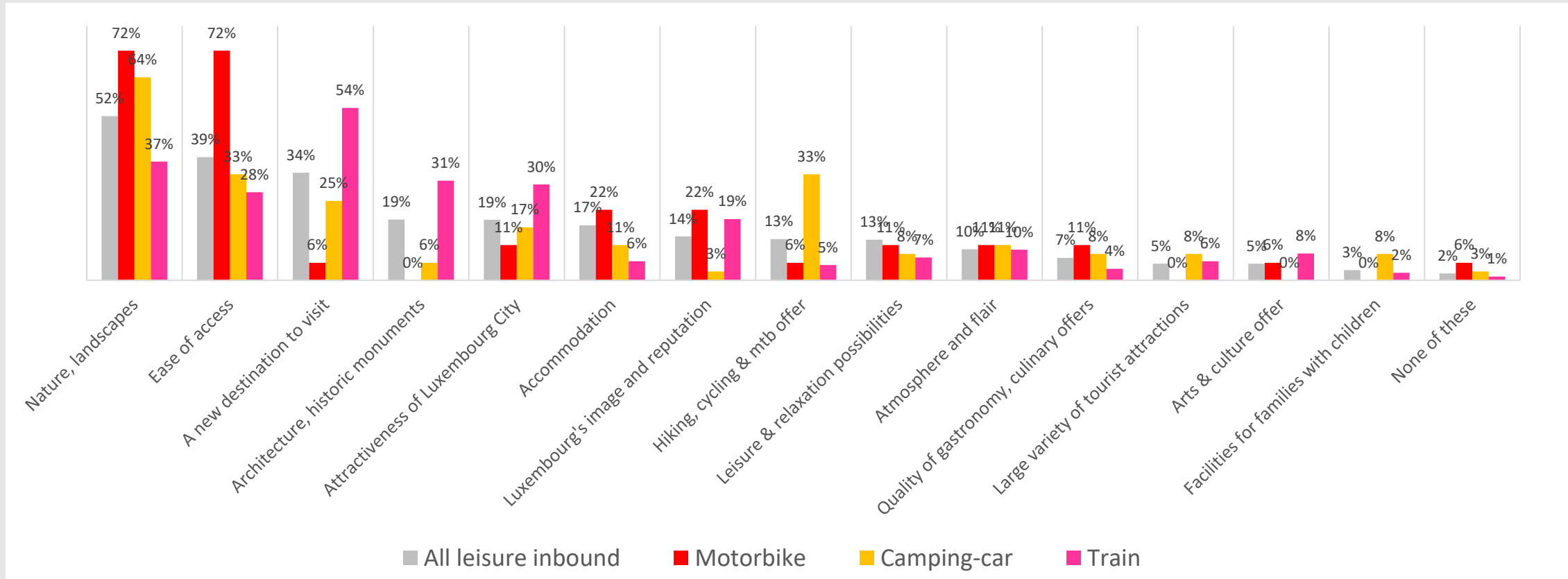


N.b. : All data on this and the following slides refers to leisure visitors spending at least 1 night in Luxembourg.



Travel Motives For Choosing Luxembourg

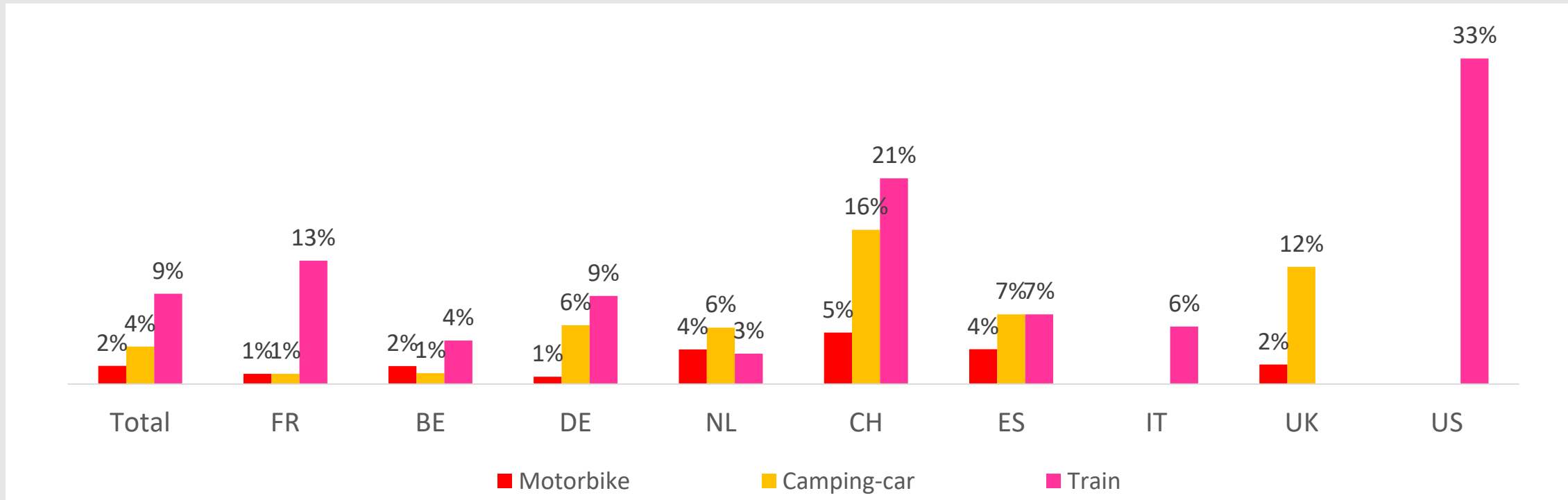
(max. 3)



Source: Visitor survey 2018, TNS Ilres/LfT

Motorbikers mostly visit Luxembourg for its nature and ease of access, while travellers by **camping-car** also appreciate a lot Luxembourg's hiking, cycling and MTB offer. Visitors travelling by **train** are frequently first-time visitors (see page 31) and therefore mostly choose Luxembourg because it is a new destination for them to visit. They are equally attracted by the city and the landscapes.

Share of motorbike, camping-car and railway by main source markets

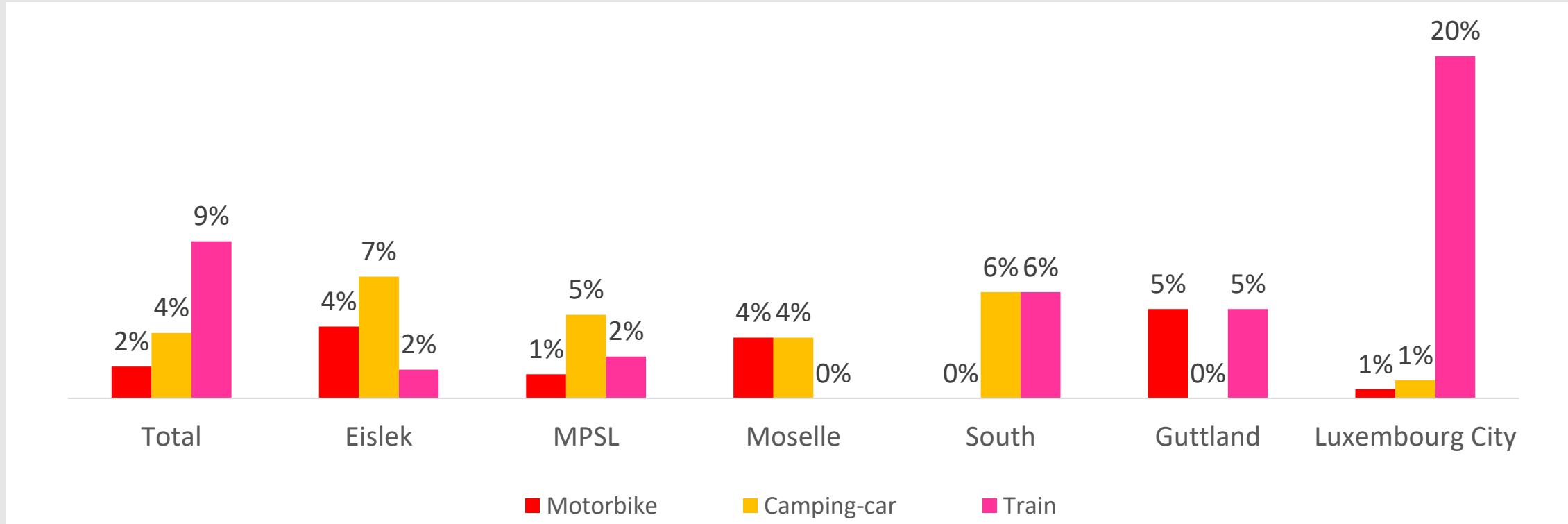


Source: Visitor survey 2018, TNS Ilres/LfT

Among Luxembourg visitors, **motorbike** is most popular among the Dutch, Swiss, Spanish and Belgian guests, whereas **camping-car** is particularly often favoured by the Swiss, British, Spanish, German and Dutch travellers.

Train is more often chosen by visitors from France (thanks to TGV), but also by Germans and, especially, Swiss visitors. This mean of transport is also popular among long-haul visitors (e.g. via Eurail), often combining several European destinations by rail (the high share among US travellers above should however be approached with caution due to small sample size).

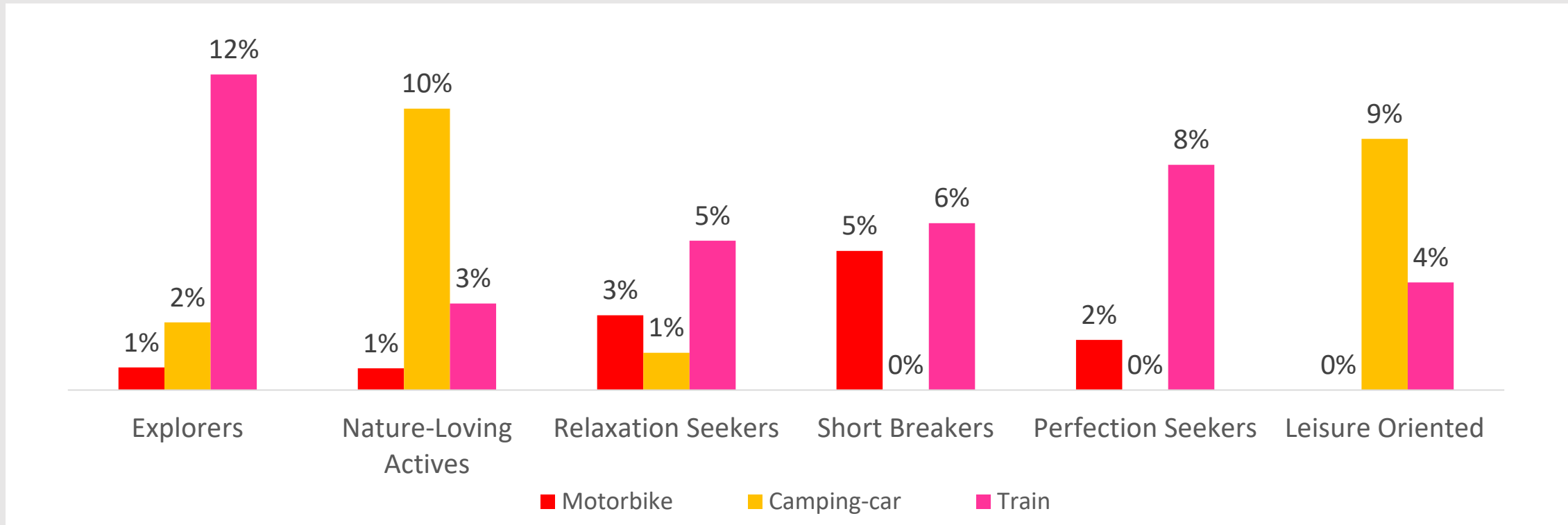
Share of motorbike, camping-car and railway by region of stay



Source: Visitor survey 2018, TNS Ilres/LfT

As expected, **motorbikers** tend to stay in the North of the country, but also Guttland and Moselle regions are popular for spending the night. Travellers by **camping-car** prefer the North, East and South of Luxembourg for staying over night, while travellers by **train** by far prefer Luxembourg City, where their share amounts to 1/5 of all leisure visitors.

Share of motorbike, camping-car and railway by target group



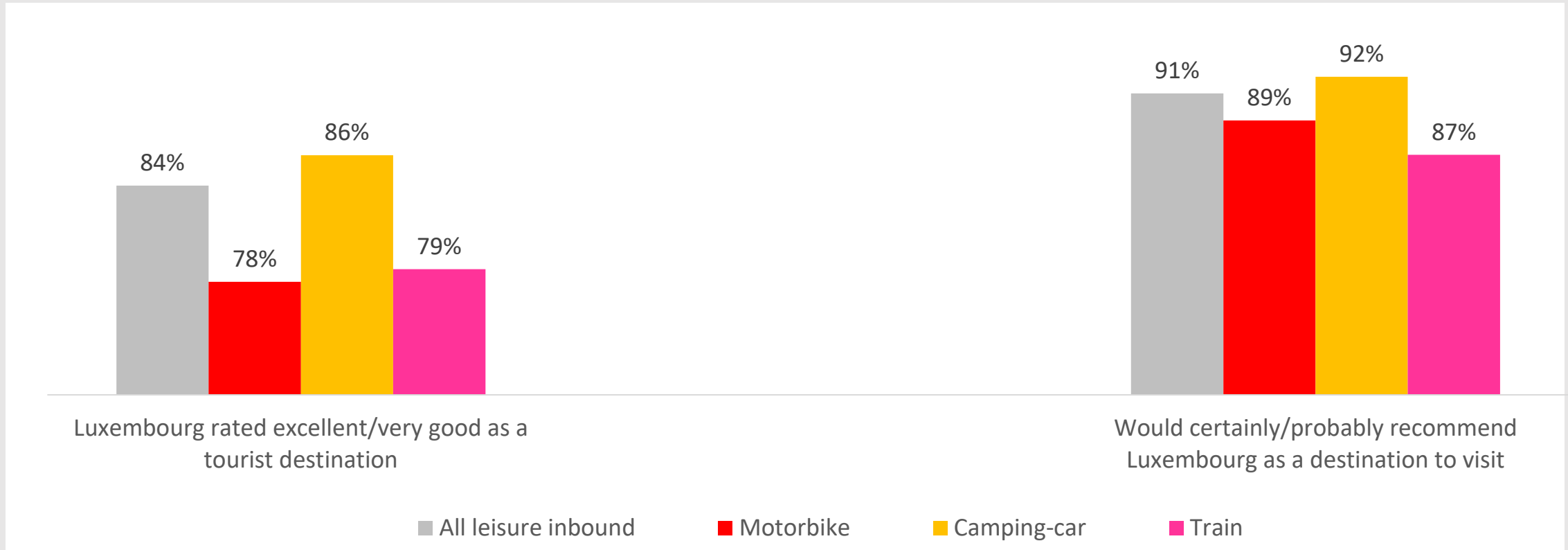
Source: Visitor survey 2018, TNS Ilres/LfT

The share of travellers by **motorbike** is higher than average among Relaxation Seekers and, especially, Short Breakers.

Visitors travelling by **camping-car** are overrepresented among Nature-Loving Actives, in line with their high propensity to visit Luxembourg for outdoor activity purposes. But also quite some Leisure Oriented are travelling by camping-car to the Grand Duchy.

Meanwhile, the share of **train** travellers is relatively higher among Explorers and, to a lesser extent, Perfection Seekers.

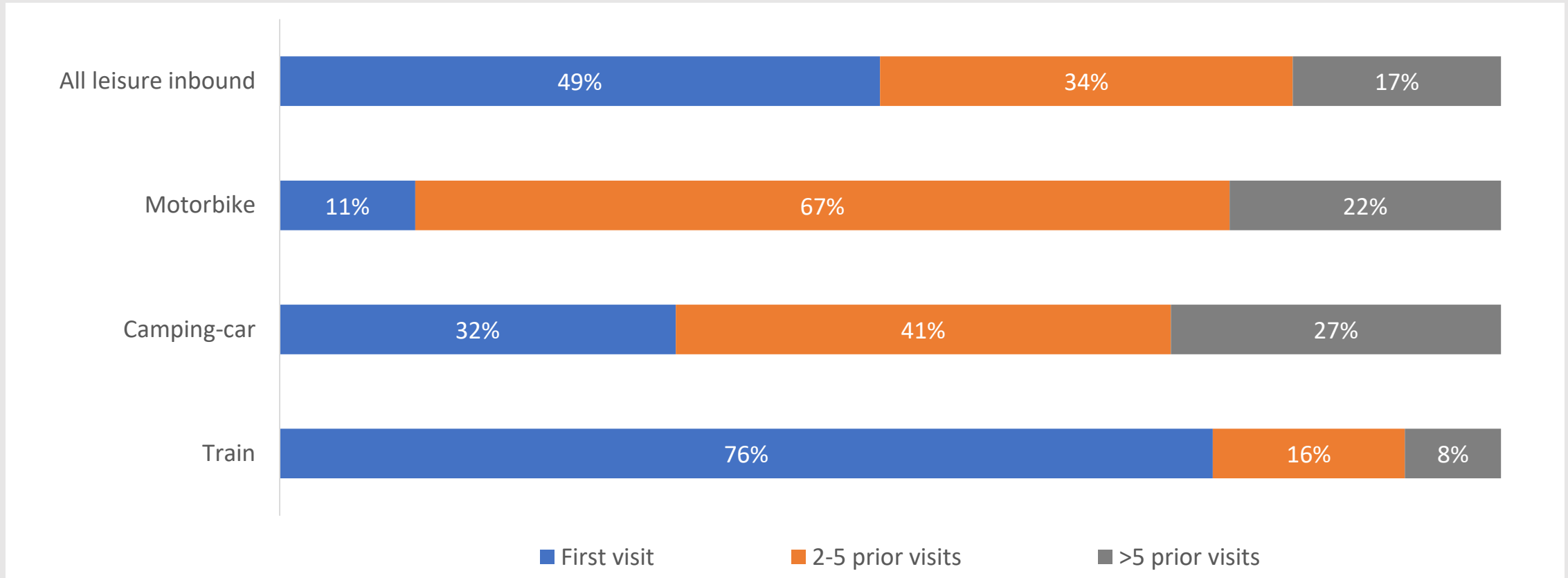
General Satisfaction With Destination Luxembourg



Source: Visitor survey 2018, TNS Ilres/LfT

Satisfaction with Luxembourg as a destination is particularly high among camping-car guests, but all three sub-segments would definitely recommend the Grand Duchy as a destination to visit to their family and friends.

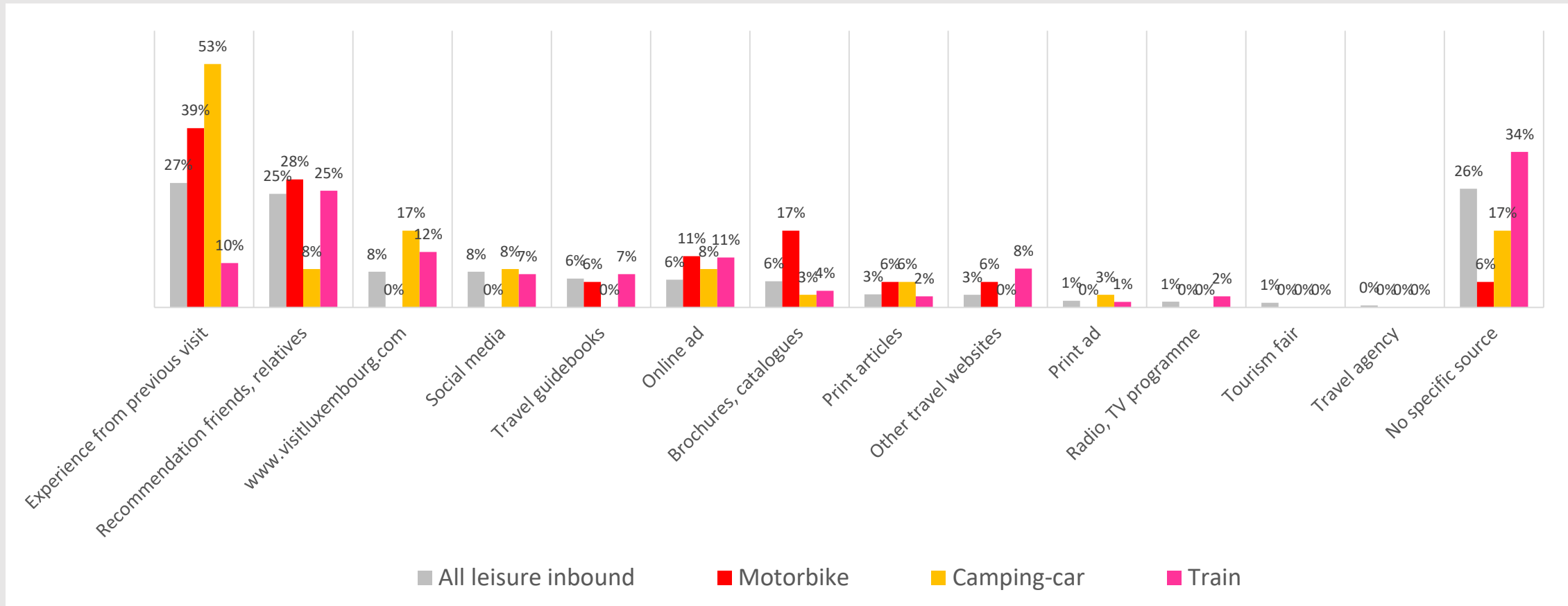
Number Of Prior Visits To Luxembourg



Source: Visitor survey 2018, TNS Ilres/LfT

As mentioned, the share of first-time visitors is higher among **train** travellers, while it is particularly low among **motorbikers**. Share of loyal visitors (>5 previous visits) is highest in the segment of **camping-car** travellers.

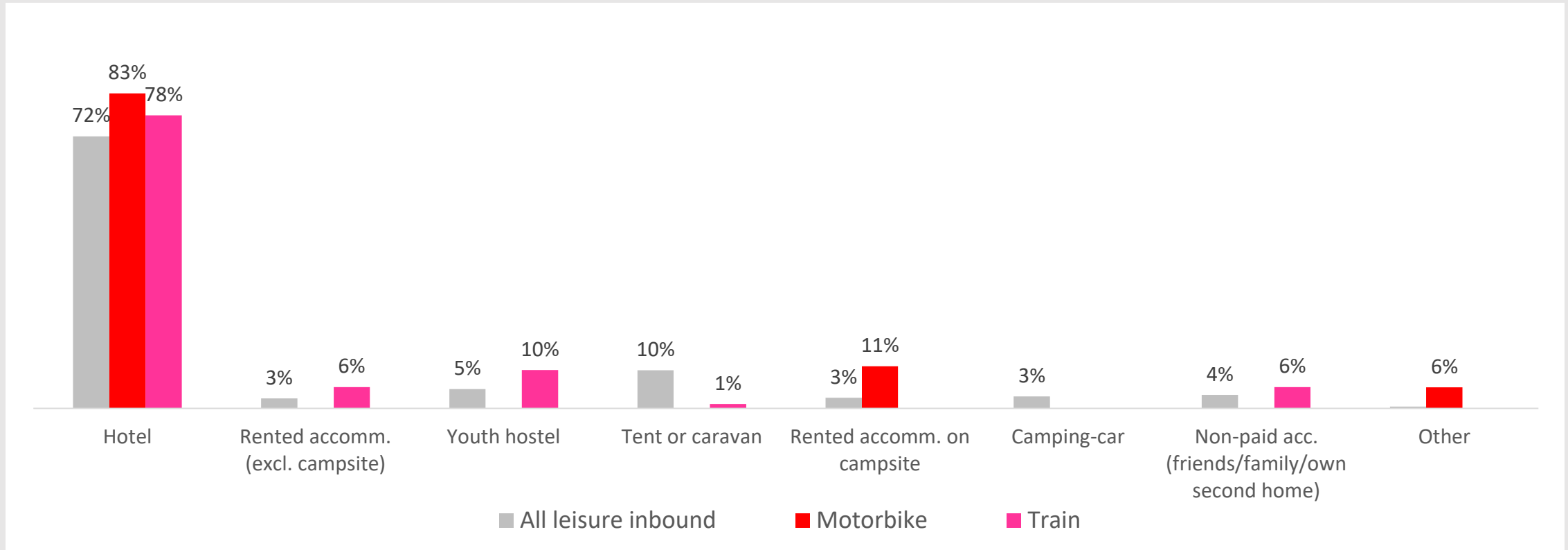
Influence And Inspiration Sources for choosing Luxembourg as destination



Source: Visitor survey 2018, TNS Ilres/LfT

Besides own previous experience (if so), word of mouth remains the leading inspiration source for the three sub-segments, although many **train** travellers claimed not having been influenced by any specific source at all. Printed brochures and catalogues remain relatively more important for **motorbikers**, while Visitluxembourg.com was particularly often used by **camping-car** visitors.

Type Of Accommodation

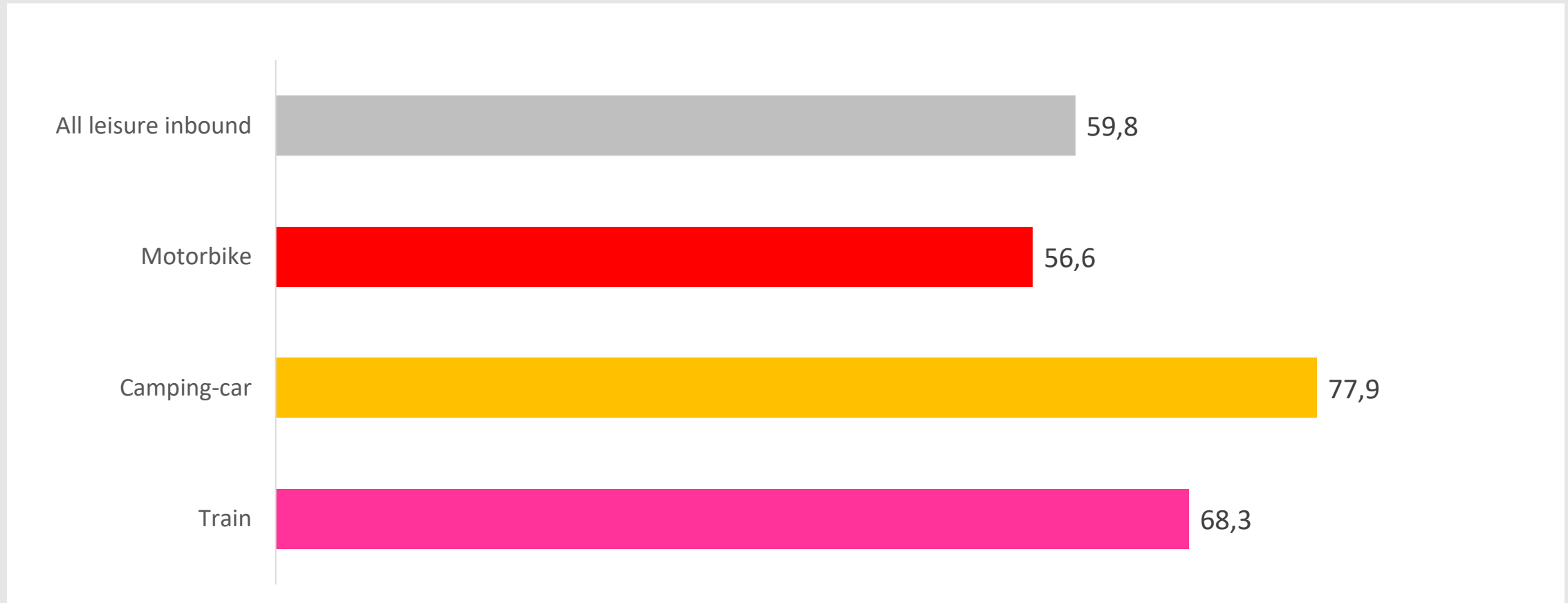


Source: Visitor survey 2018, TNS Ilres/LfT

Both visitors travelling by motorbike and by train very largely prefer hotels to any other type of accommodation. Rentals on campsites are sometimes also chosen by **motorbikers**, while some **train** travellers – since more often being urban visitors – use Airbnb or stay at friends and relatives. Youth hostels also relatively more frequently host guests travelling by train.

Moment Of Decision To Undertake The Trip

Average number of days before arrival

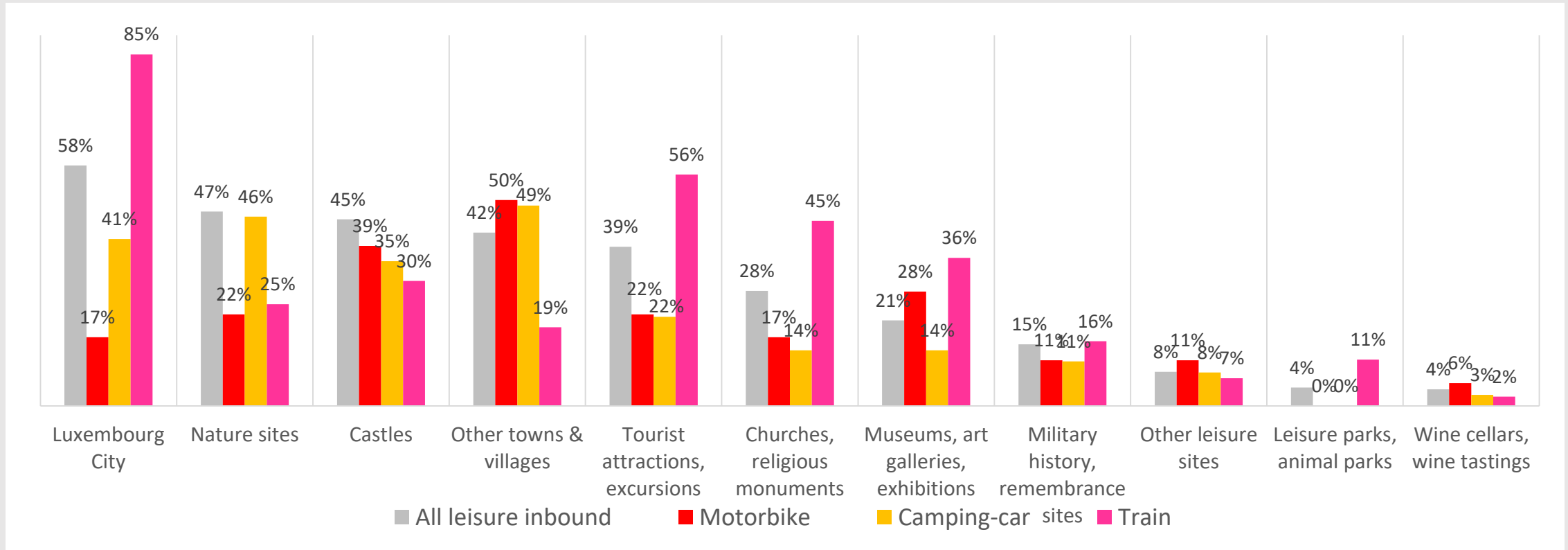


Source: Visitor survey 2018, TNS Ilres/LfT

Lead time search-to-arrival is longest for **camping-car** visitors, and shortest for **motorbikers**.

Train travellers also tend to decide relatively longer ahead than the average Luxembourg guest.

Places Visited During Stay

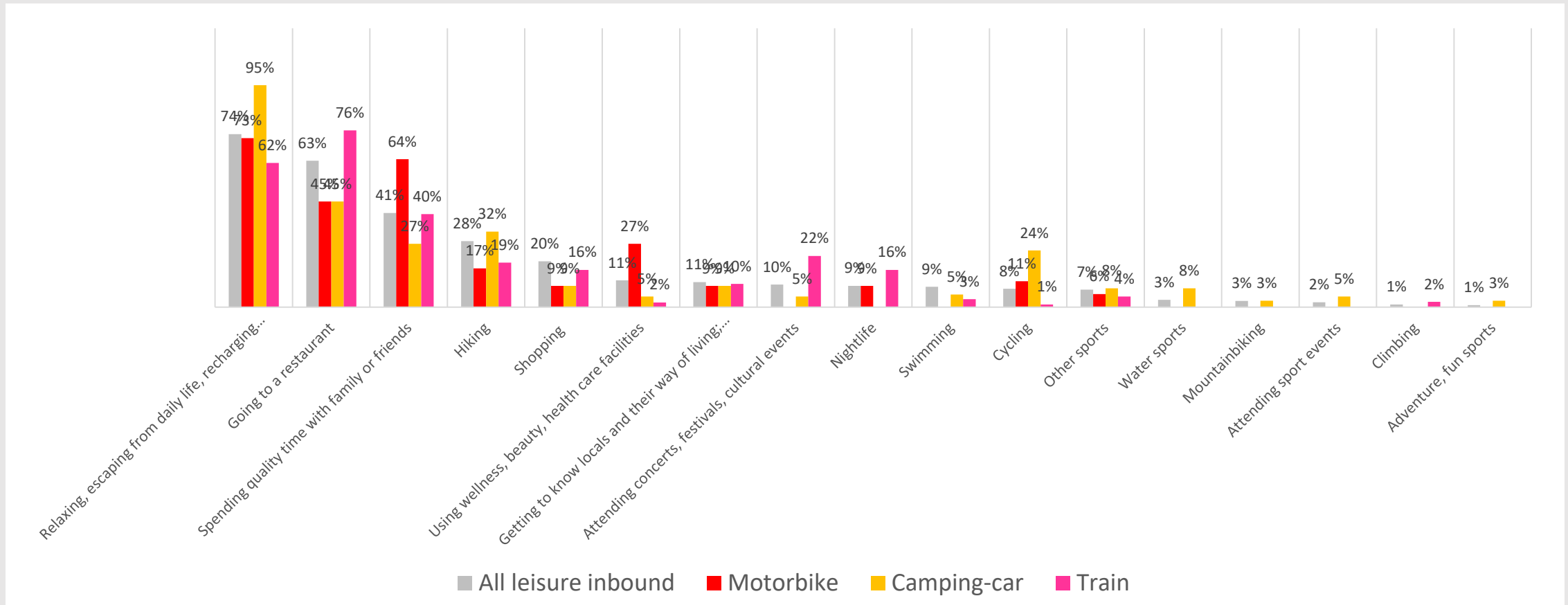


Source: Visitor survey 2018, TNS Ilres/LfT

Places visited by **train** travellers more often include urban and cultural sites, while visitors by **camping-car** tend to visit a wide array of various places, with nevertheless a preference for nature sites and smaller towns and villages in the countryside.

Motorbikers also display a preference for smaller towns and villages followed by castles, but they also enjoy visiting museums. They rarely tend to visit the capital city.

Activities During Stay



Source: Visitor survey 2018, TNS Ilres/LfT

Top activities for visitors travelling by **train** include eating out, attending cultural events, hiking, shopping and nightlife.

Camping-car visitors are equally fond on relaxing and escaping from daily life, but also on being active during their holidays (esp hiking and cycling).

The travel motive of spending time with family and friends is particularly emphasised by **motorbikers**, but they also enjoy relaxing, wellness and, to a lesser extent, hiking.

Booking Channels



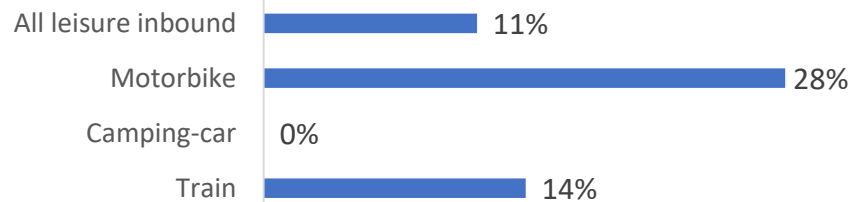
Visitors having made booking before arrival



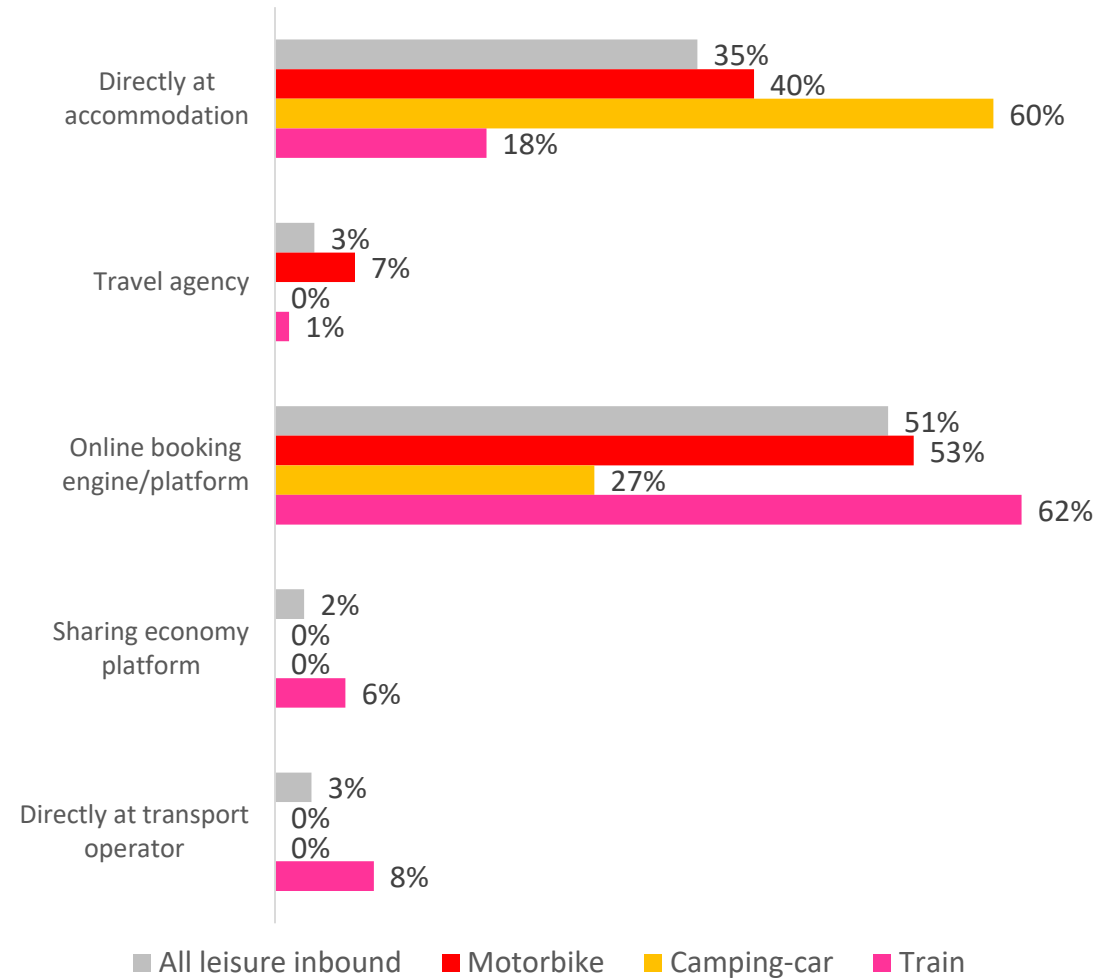
Share of bookings made online



Package booked

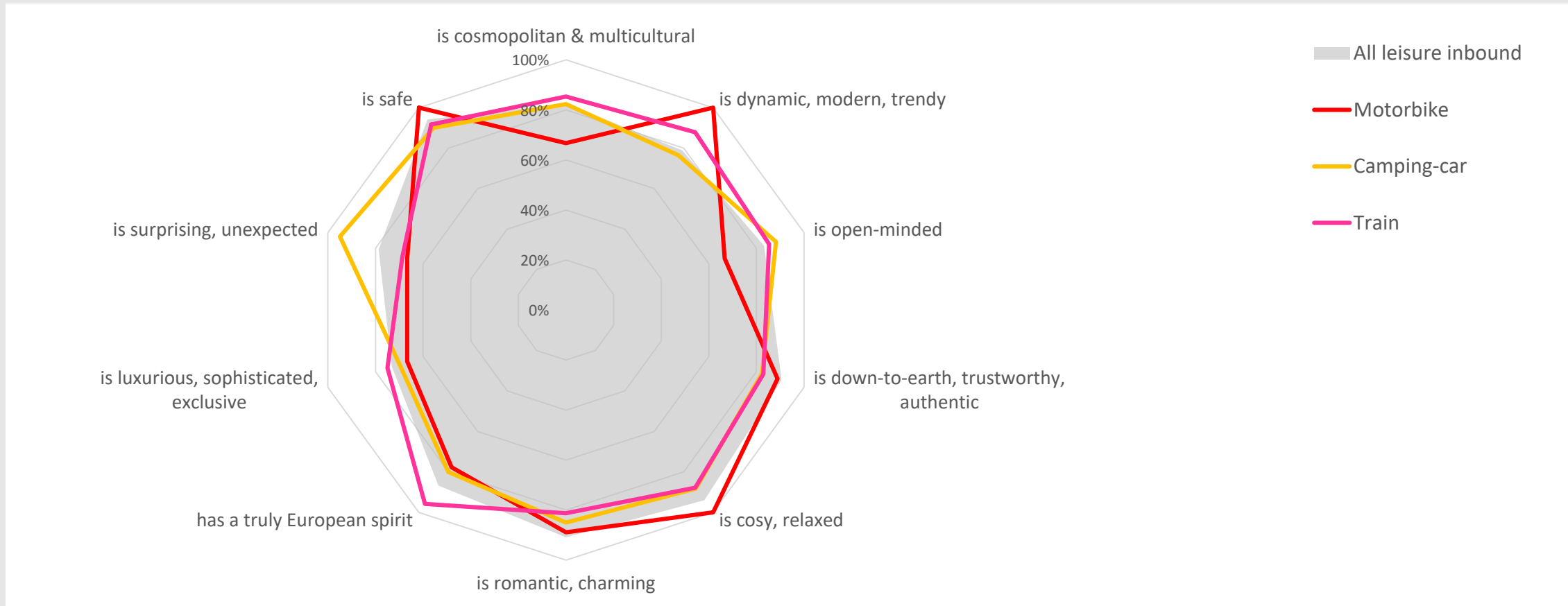


Booking channel



Rating Of Luxembourg's Image Features

% of visitors agreeing



Source: Visitor survey 2018, TNS Ilres/LfT

Visitors travelling by **camping-car** relatively more often find Luxembourg to be surprising and unexpected.

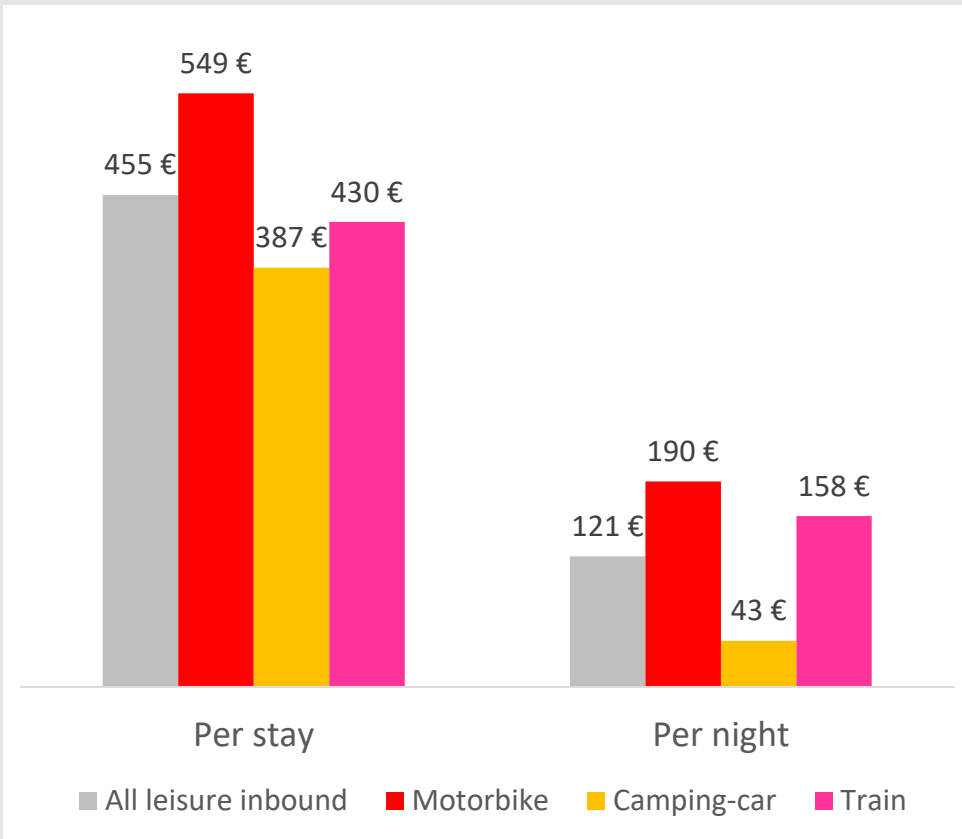
Train travellers highlight the European spirit of the country, as well as its dynamic and modern aspect.

The latter is also frequently mentioned by **motorbikers**, who furthermore appreciate its cosy and relaxed atmosphere.

Total Expenditure Per Person & Breakdown By Categories

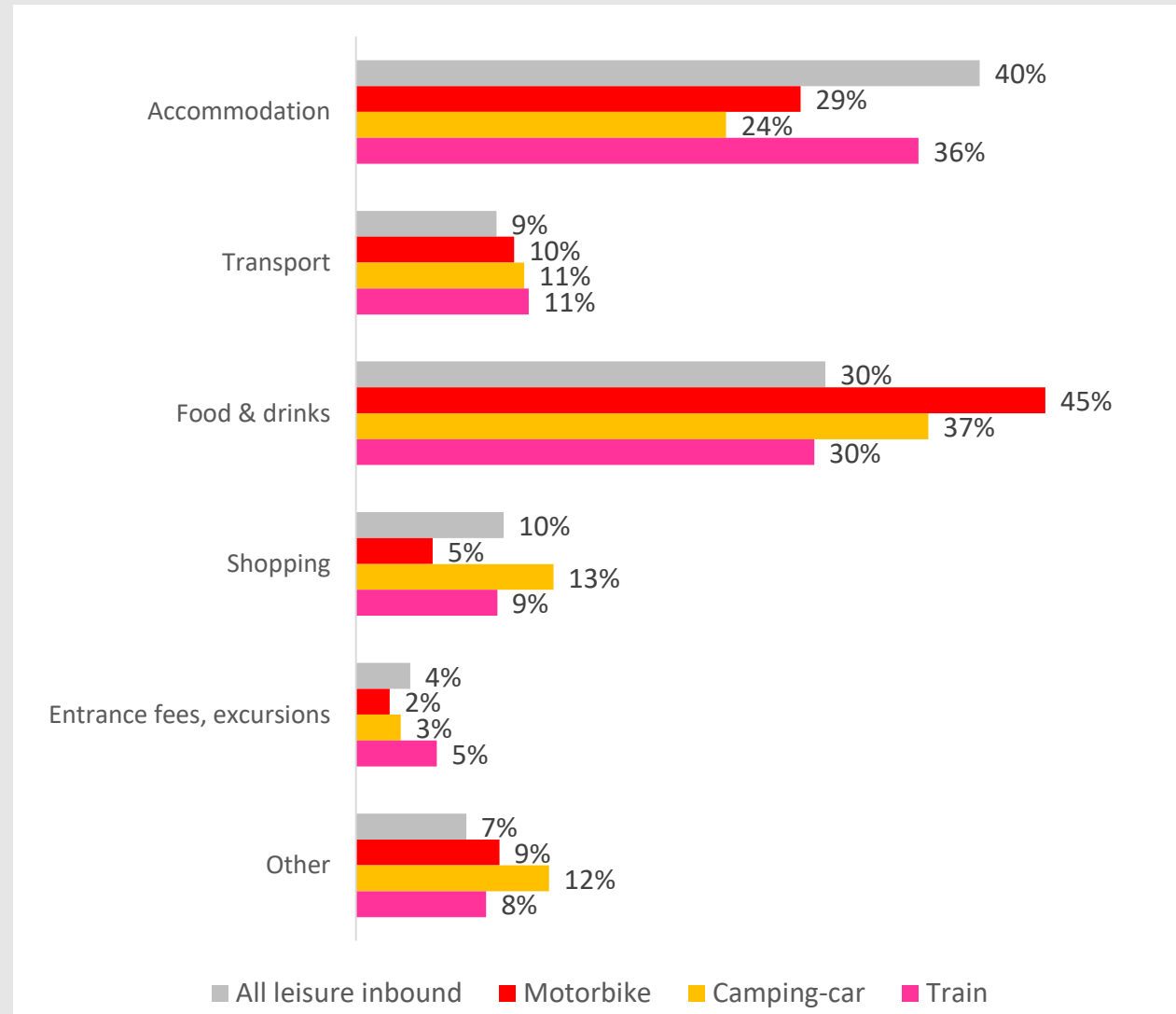


Trips with at least one night in Luxembourg



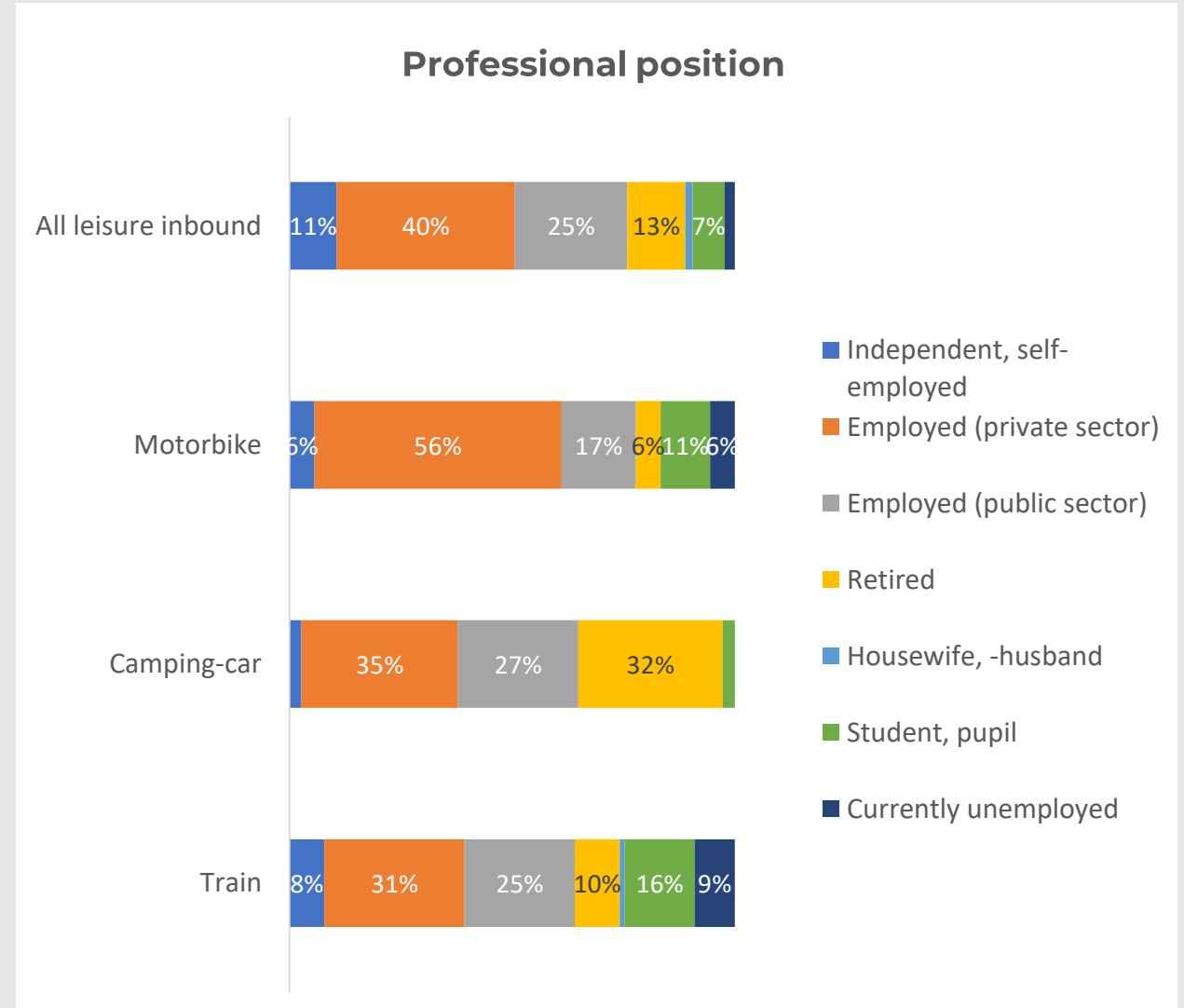
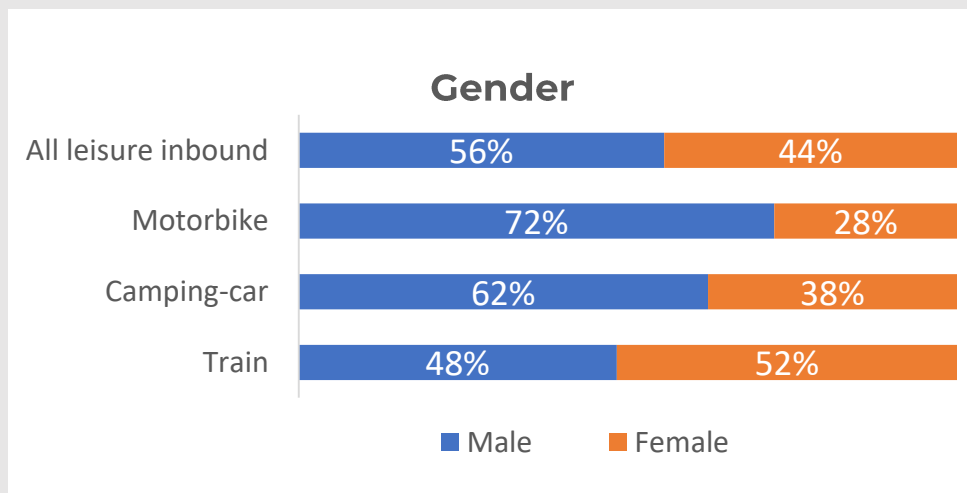
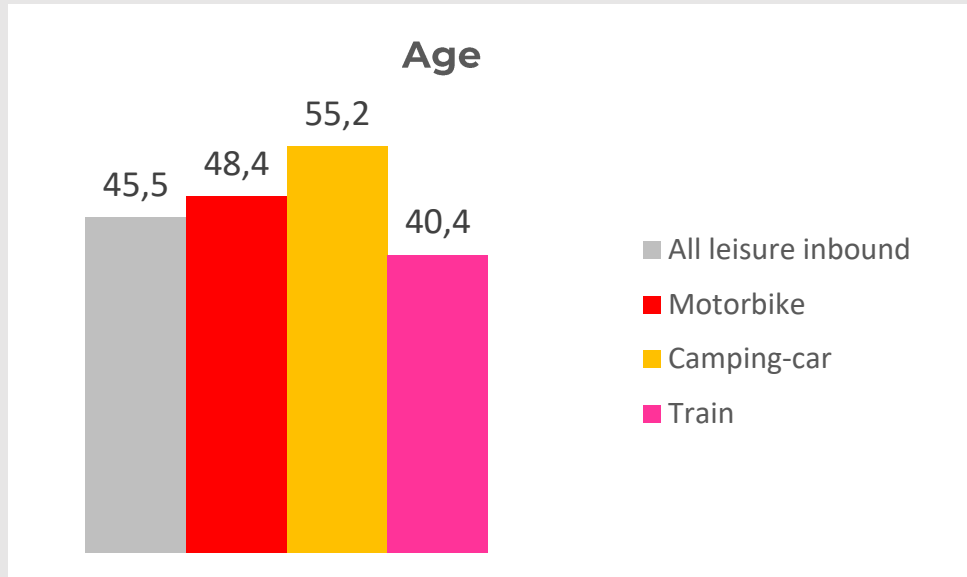
Spending by motorbikers tends to be above average both in terms of total expenditure and spend per night. They notably like to spend on food & drinks.

Daily spend is by far lowest for camping-car visitors, mostly due to low accommodation costs.



Source: Visitor survey 2018, TNS Ilres/LfT

Socio-Demography





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