

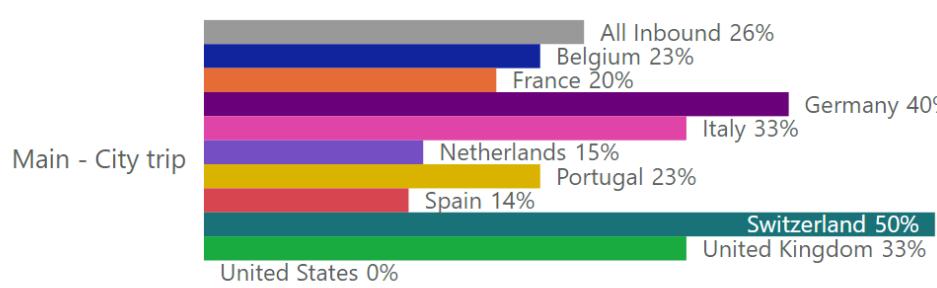


Luxembourg for Tourism
Theme profile

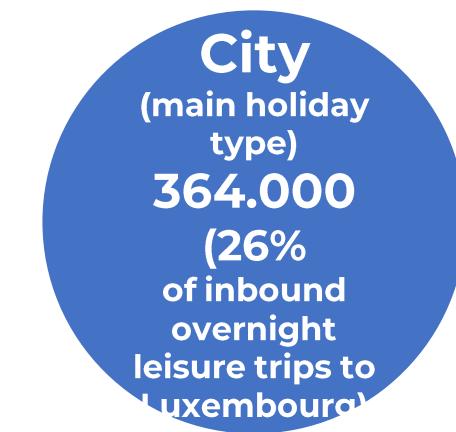
CITY TRIPS (as a main holiday type) **2024**



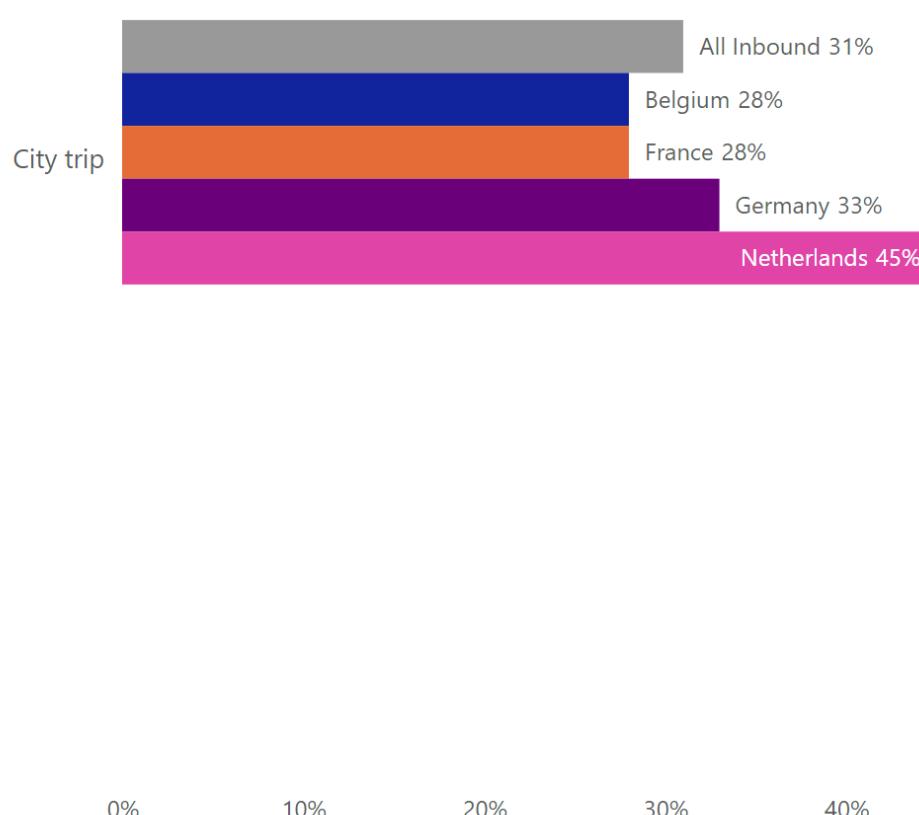
Market size of City trips segment



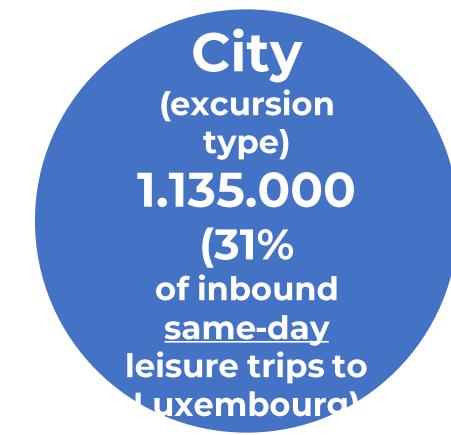
Number of overnight leisure trips to Luxembourg (estimate, yearly average 2023/2024)



- Switzerland and Germany show the highest share of city trip visitors. Spain and the Netherlands shows the lowest share.



Number of same-day leisure trip to Luxembourg (estimate, yearly average 2023/2024)

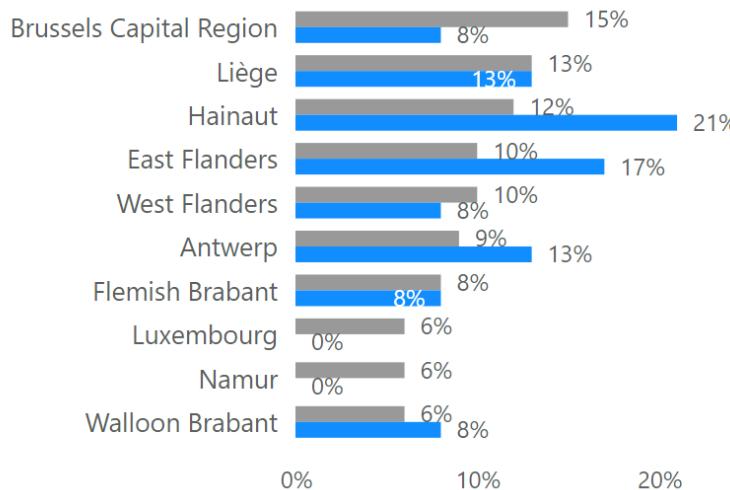


- Contrary to visitors with overnights, the Netherlands display the highest share of same-day visits related to city trips.

Region of origin (BE)

Visitors with overnight

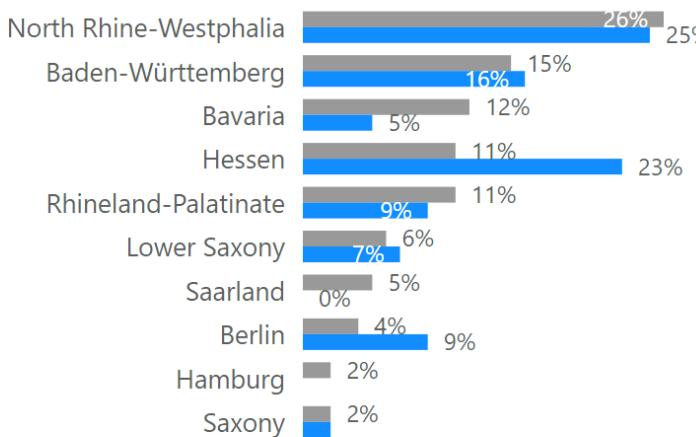
● All Inbound ● City (main holiday type)



Region of origin (DE)

Visitors with overnight

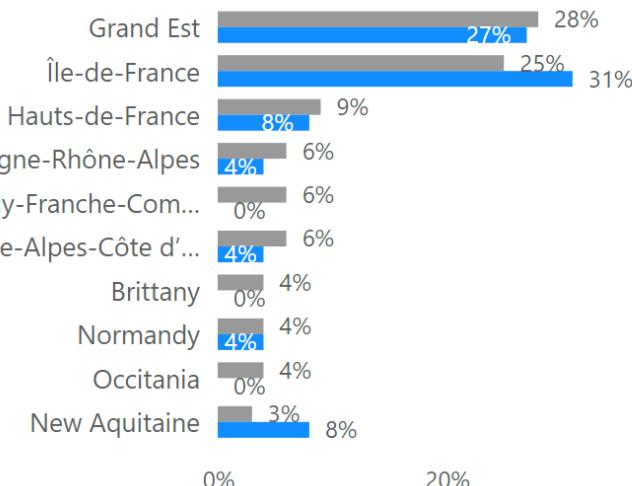
● All Inbound ● City (main holiday type)



Region of origin (FR)

Visitors with overnight

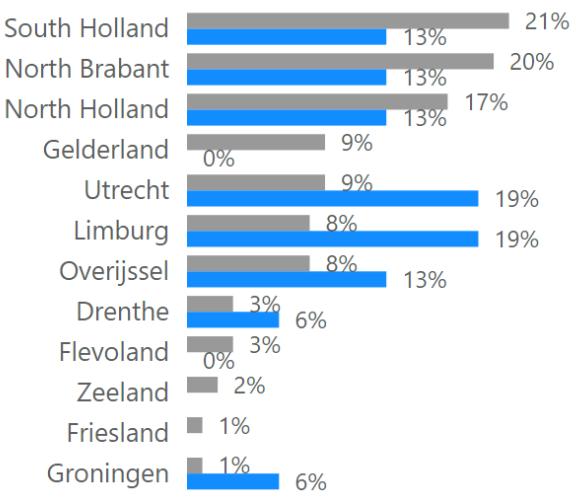
● All Inbound ● City (main holiday type)



Region of origin (NL)

Visitors with overnight

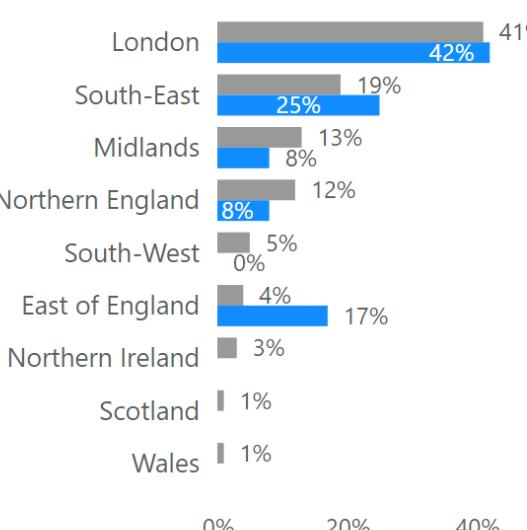
● All Inbound ● City (main holiday type)



Region of origin (UK)

Visitors with overnight

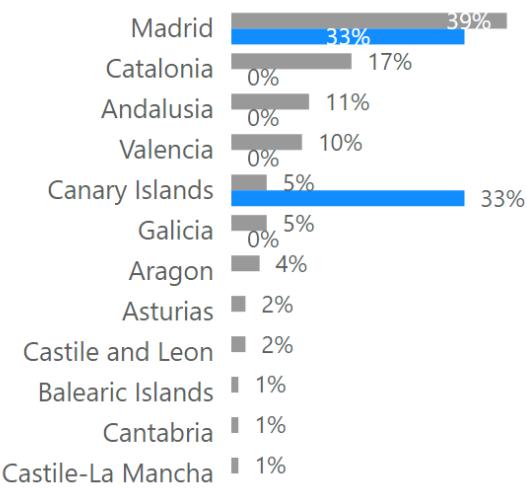
● All Inbound ● City (main holiday type)



Region of origin (ES)

Visitors with overnight

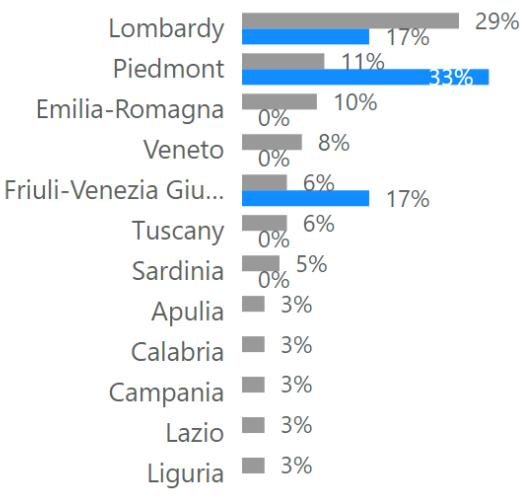
● All Inbound ● City (main holiday type)



Region of origin (IT)

Visitors with overnight

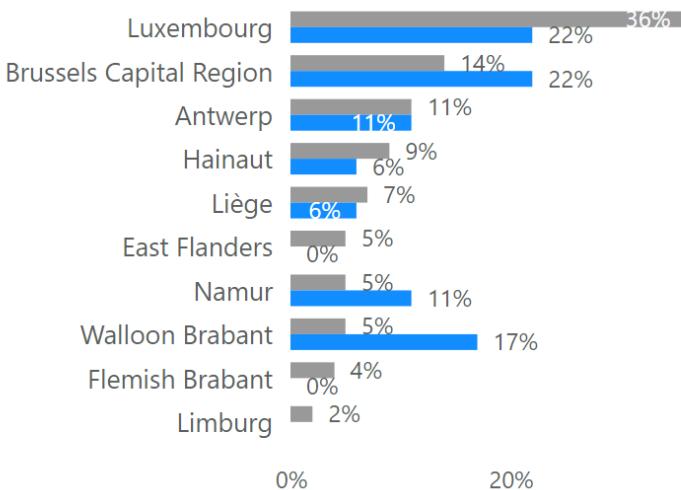
● All Inbound ● City (main holiday type)



Region of origin (BE)

Same-day visitors

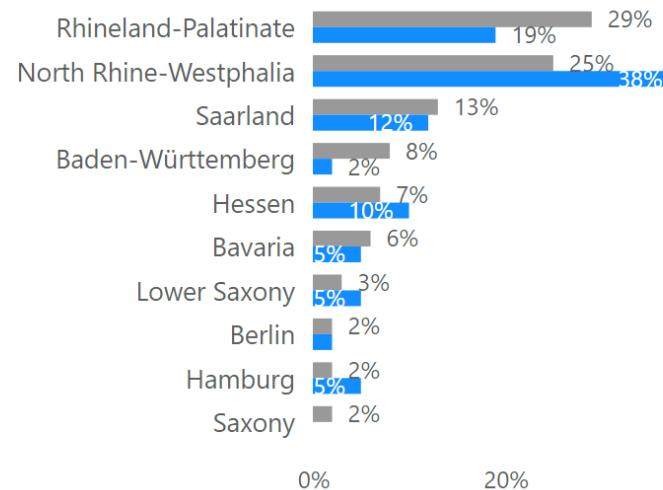
● All Inbound ● City (excursion type)



Region of origin (DE)

Same-day visitors

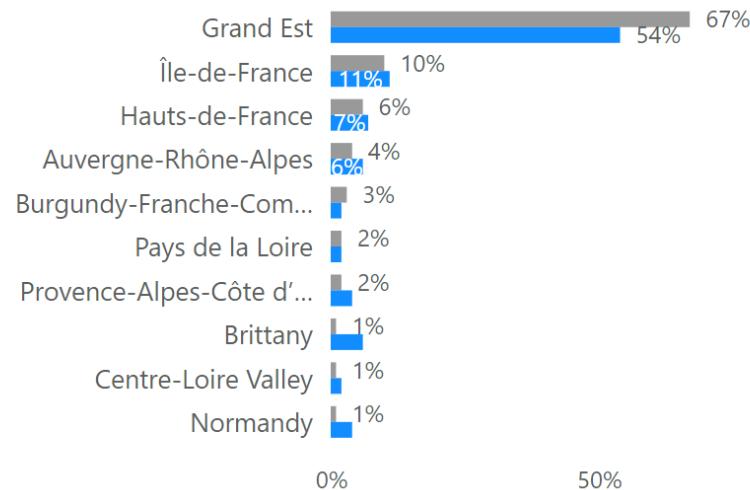
● All Inbound ● City (excursion type)



Region of origin (FR)

Same-day visitors

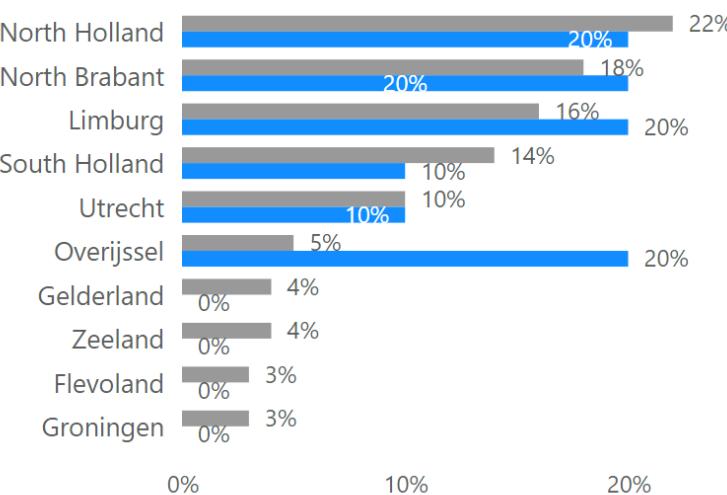
● All Inbound ● City (excursion type)



Region of origin (NL)

Same-day visitors

● All Inbound ● City (excursion type)



- For visitors with overnights: Compared to overall inbound travellers, Belgium shows higher shares of city trip travellers in a good part of its regions, but less so from Brussels who are more prominent among same-day city visitors. For Germany, Hessen is a stand-out region.
- For same-day visitors, North Rhine-Westphalia (DE) indicated a higher share of city trip visitors compared to overall inbound German same-day visitors.

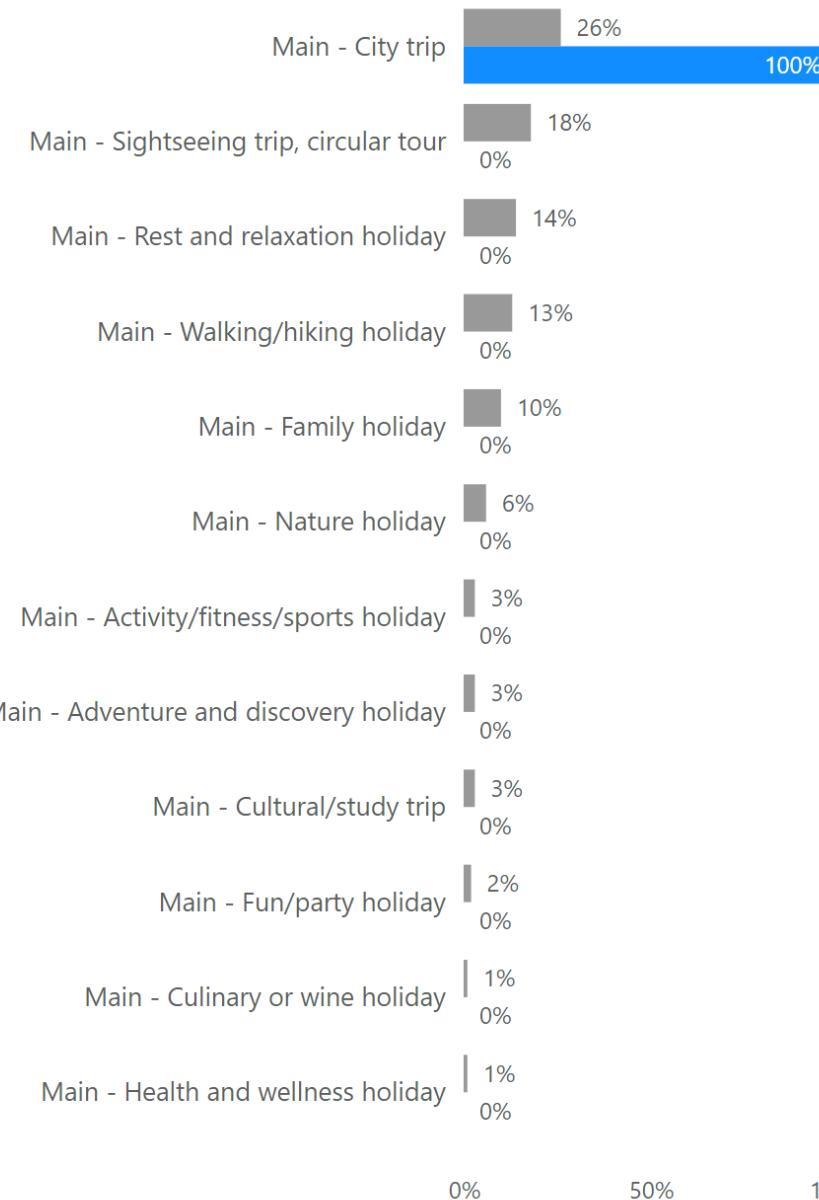


Travel behaviour of leisure visitors with City trips as a holiday type / excursion in Luxembourg

Main holiday types

Visitors with overnight

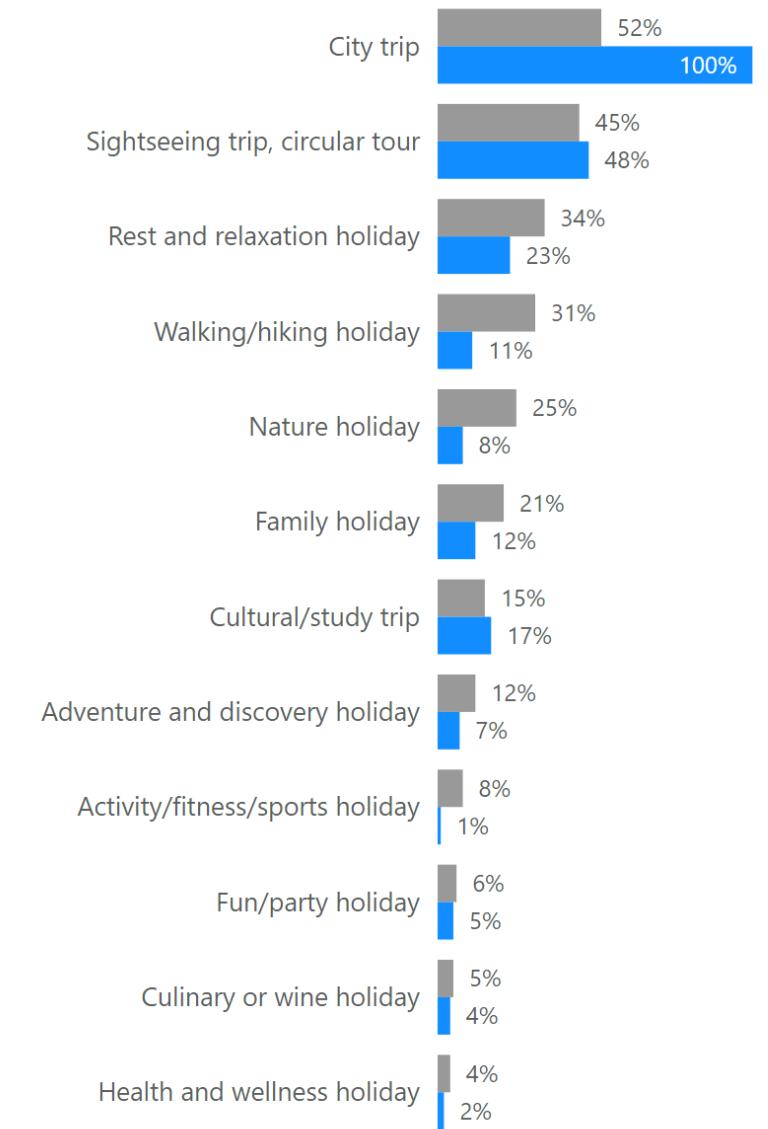
● All Inbound ● City (main holiday type)



All holiday types

Visitors with overnight

● All Inbound ● City (main holiday type)

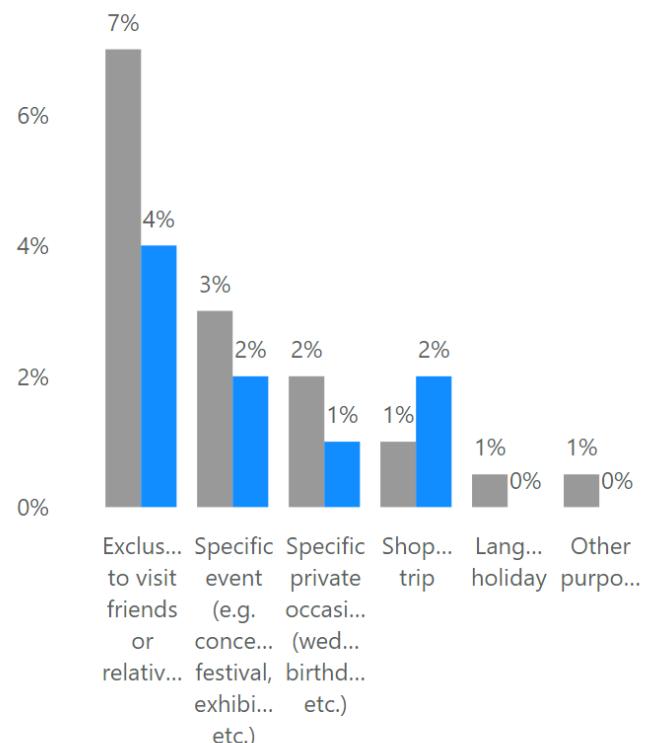


- City trips are slightly more often combined with sightseeing and cultural trips and especially less often combined with relaxation, family as well as nature and active holidays.

Main purpose of overnight trip

(if not holiday)

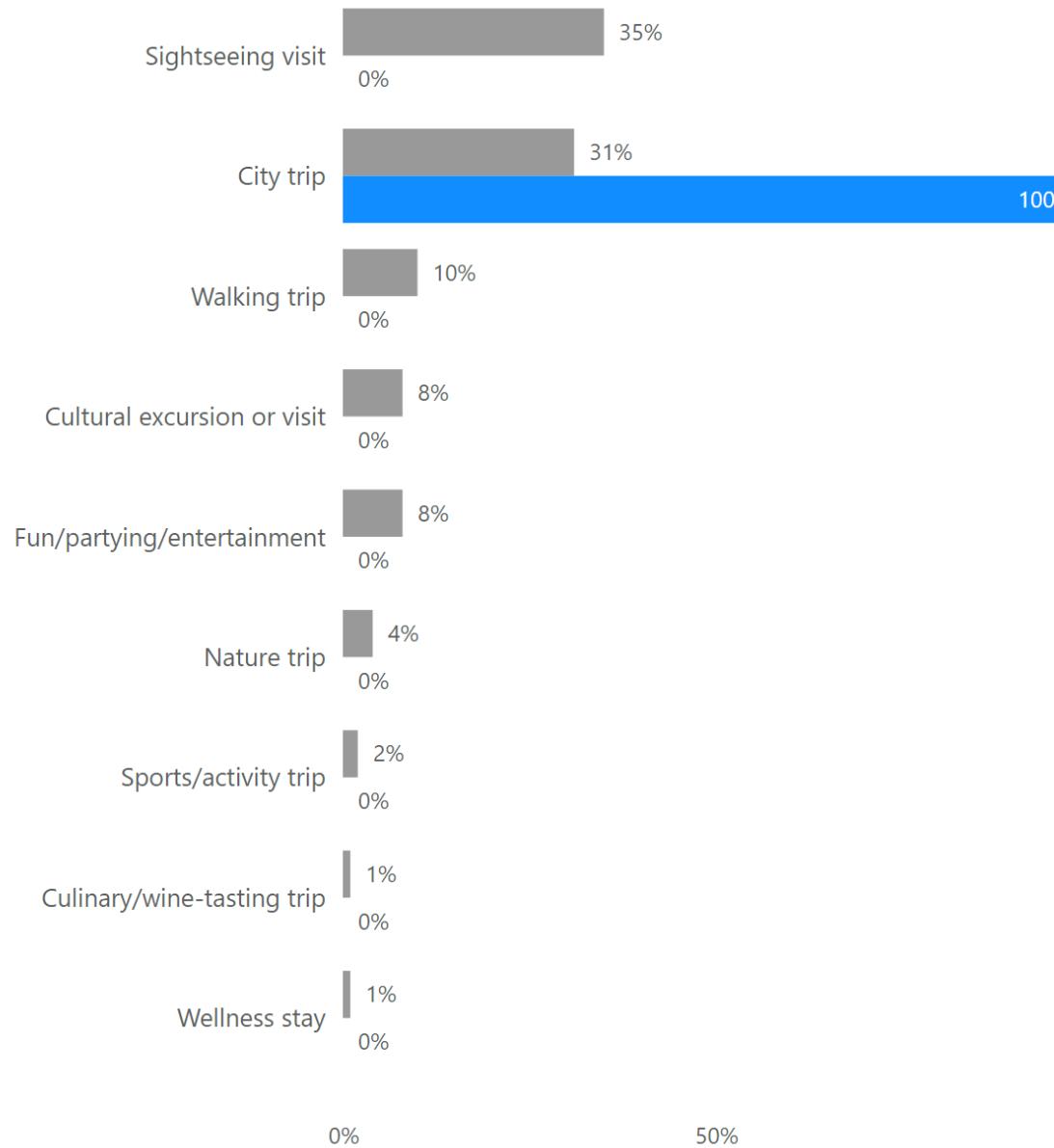
● All Inbound ● City (main holiday type)



Type of excursion

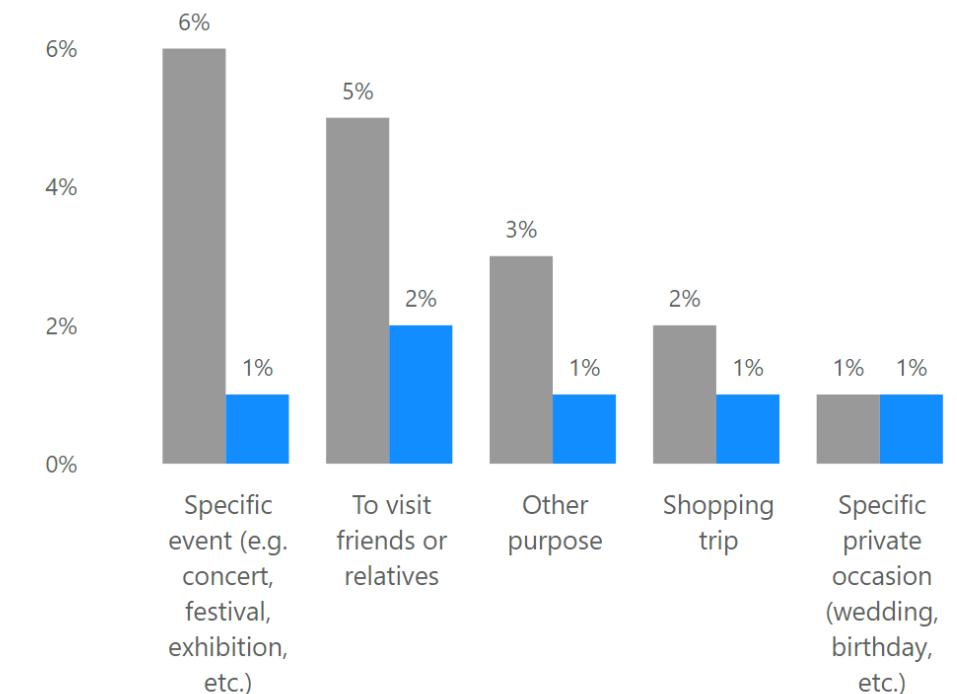
Same-day visitors

● All Inbound ● City (excursion type)



Main purpose of excursion (if not day trip)

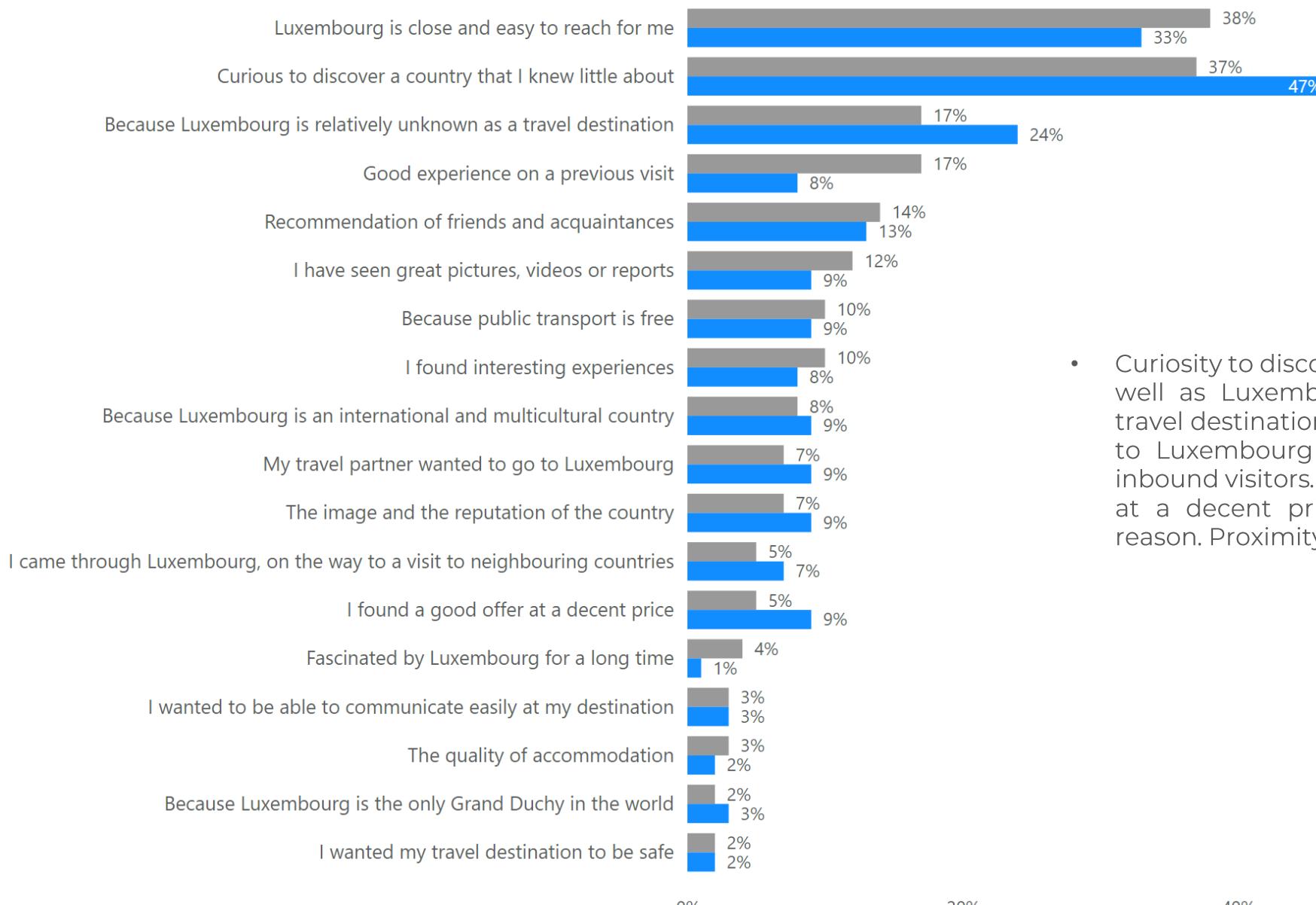
● All Inbound ● City (excursion type)



Reasons for choosing Luxembourg

Visitors with overnight

● All Inbound ● City (main holiday type)

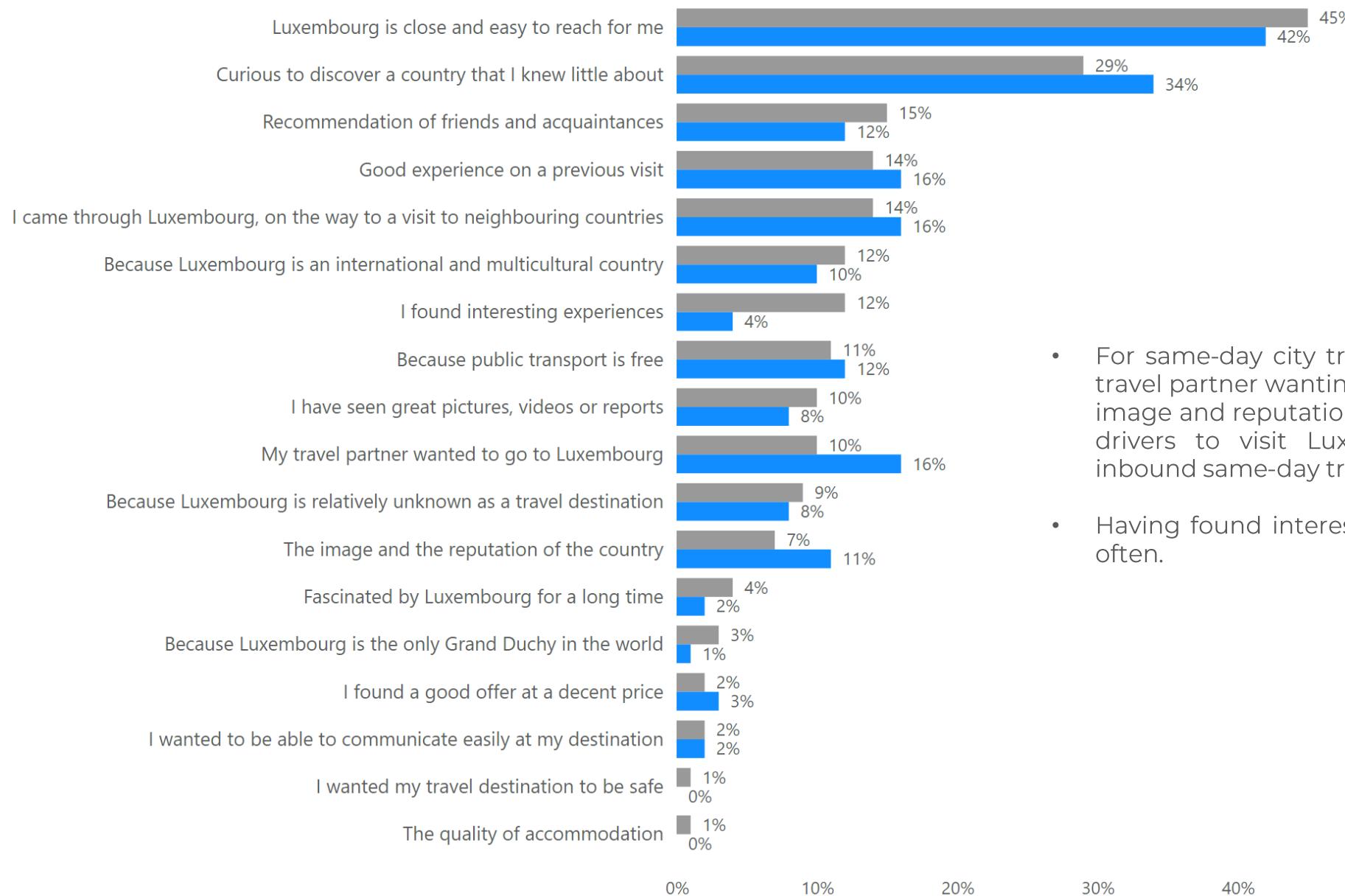


- Curiosity to discover a country one knows little about as well as Luxembourg being relatively unknown as a travel destination seem to be more of a reason to travel to Luxembourg for city trip visitors than for overall inbound visitors. Additionally, having found a good offer at a decent price is also a more often mentioned reason. Proximity is mentioned slightly less.

Reasons for choosing Luxembourg

Same-day visitors

● All Inbound ● City (excursion type)

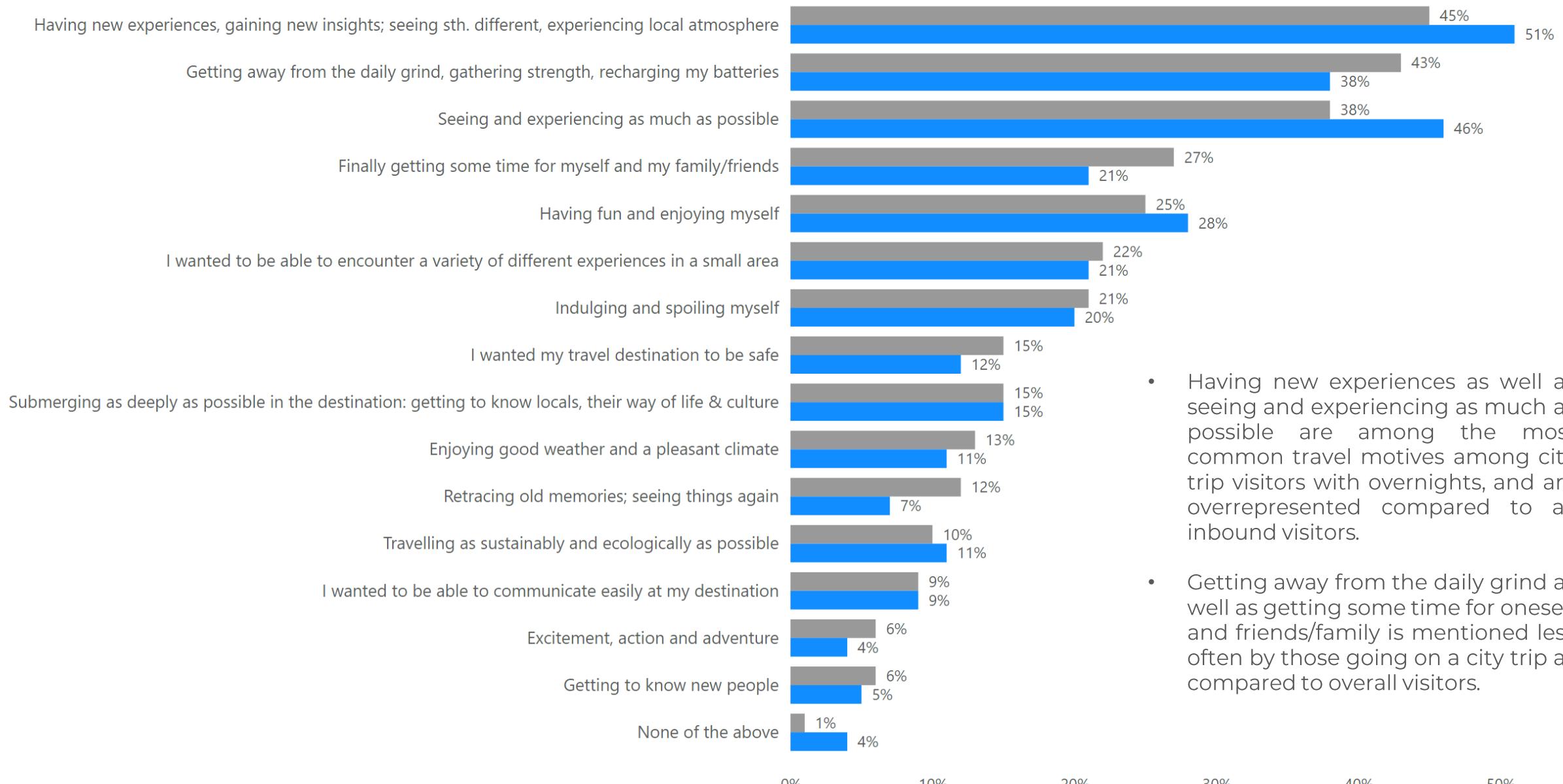


- For same-day city trip visitors, curiosity as well as one's travel partner wanting to go to Luxembourg, but also the image and reputation of the country are more important drivers to visit Luxembourg when compared to all inbound same-day travellers.
- Having found interesting experiences is mentioned less often.

Travel motives

Visitors with overnight

● All Inbound ● City (main holiday type)

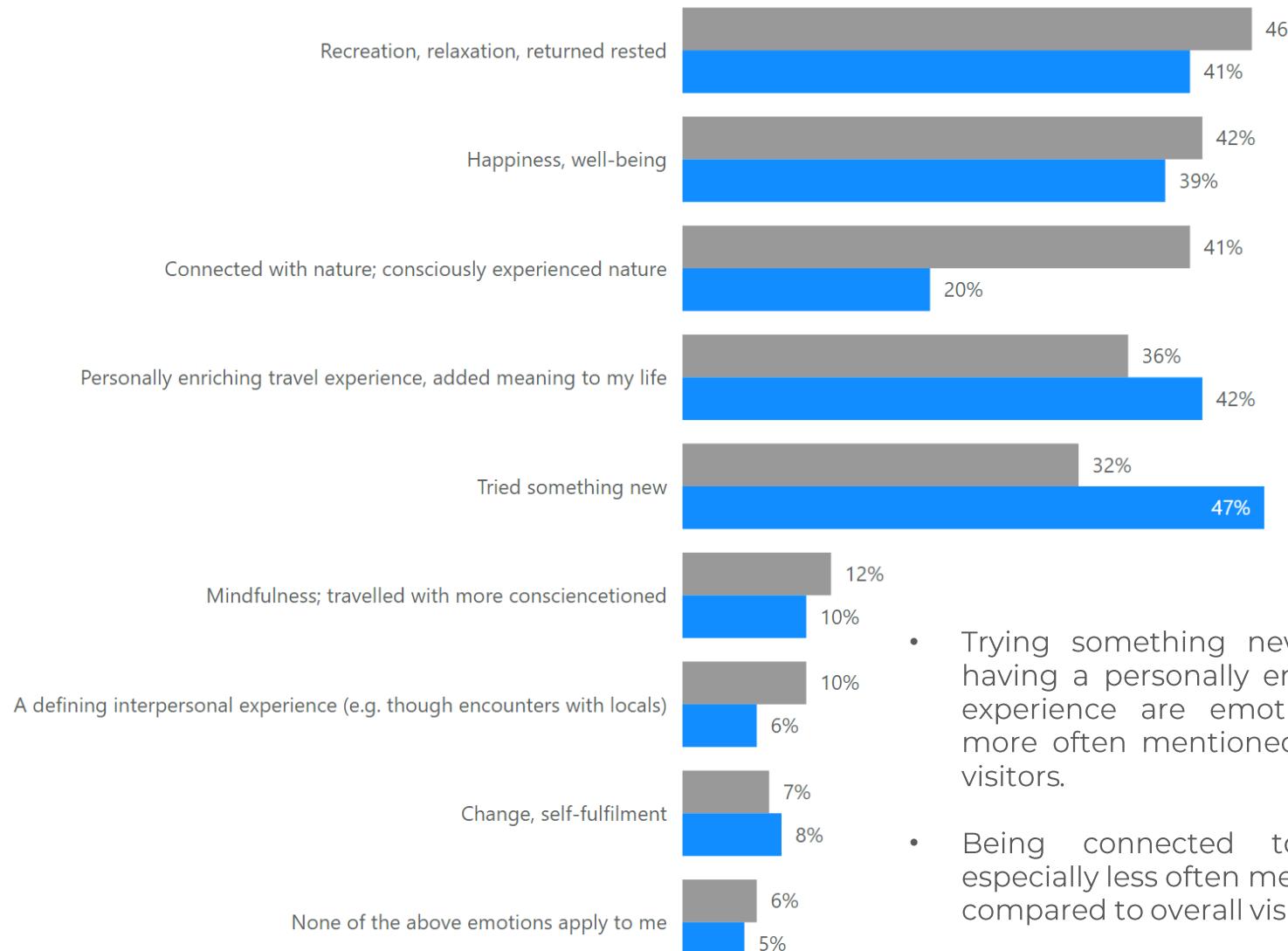


- Having new experiences as well as seeing and experiencing as much as possible are among the most common travel motives among city trip visitors with overnights, and are overrepresented compared to all inbound visitors.
- Getting away from the daily grind as well as getting some time for oneself and friends/family is mentioned less often by those going on a city trip as compared to overall visitors.

Emotional benefits experienced during stay

Visitors with overnight

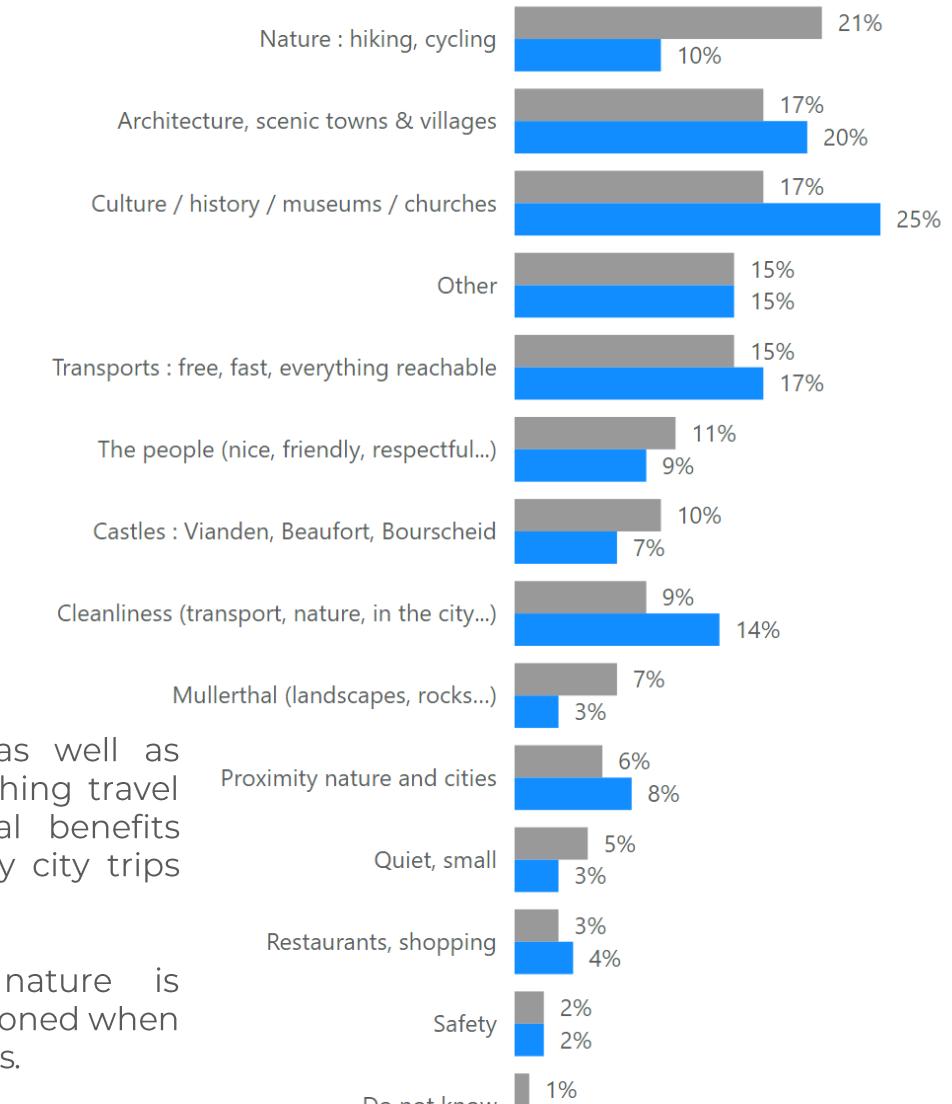
● All Inbound ● City (main holiday type)



Particularly positive experience during stay (open question)

Visitors with overnight

● All Inbound ● City (main holiday type)

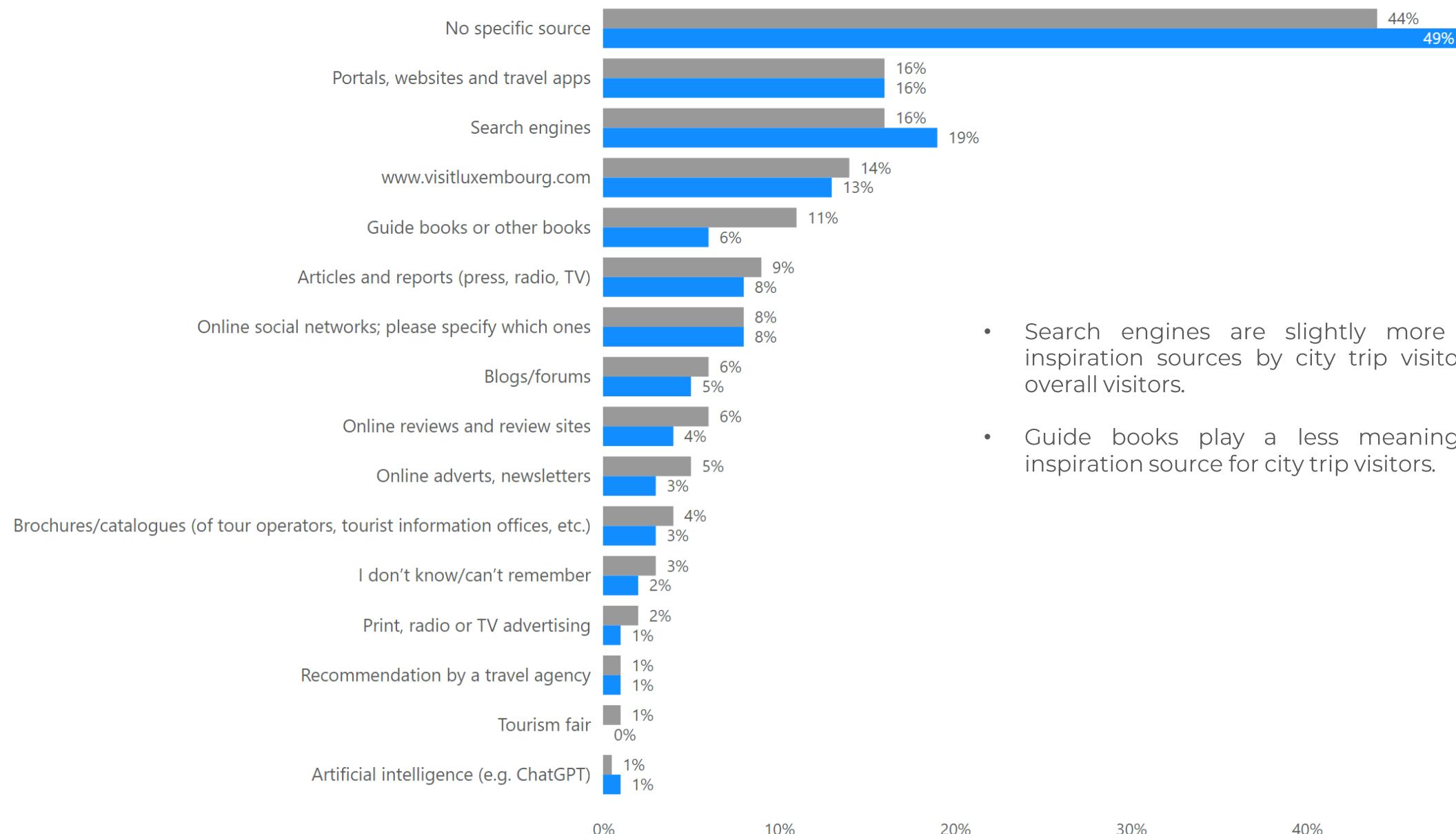


- Trying something new as well as having a personally enriching travel experience are emotional benefits more often mentioned by city trips visitors.
- Being connected to nature is especially less often mentioned when compared to overall visitors.

Inspiration sources

Visitors with overnight

● All Inbound ● City (main holiday type)

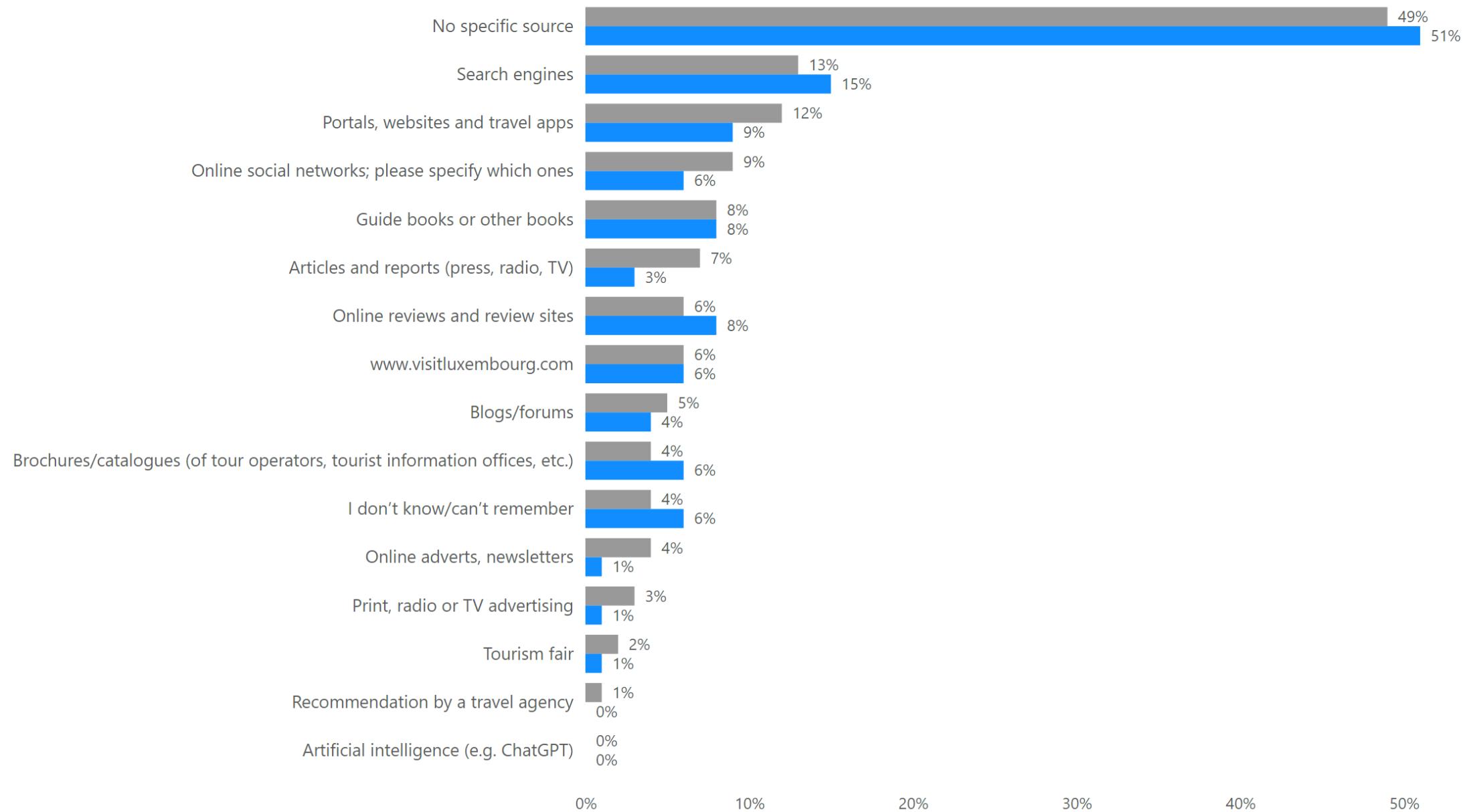


- Search engines are slightly more often used as inspiration sources by city trip visitors compared to overall visitors.
- Guide books play a less meaningful role as an inspiration source for city trip visitors.

Inspiration sources

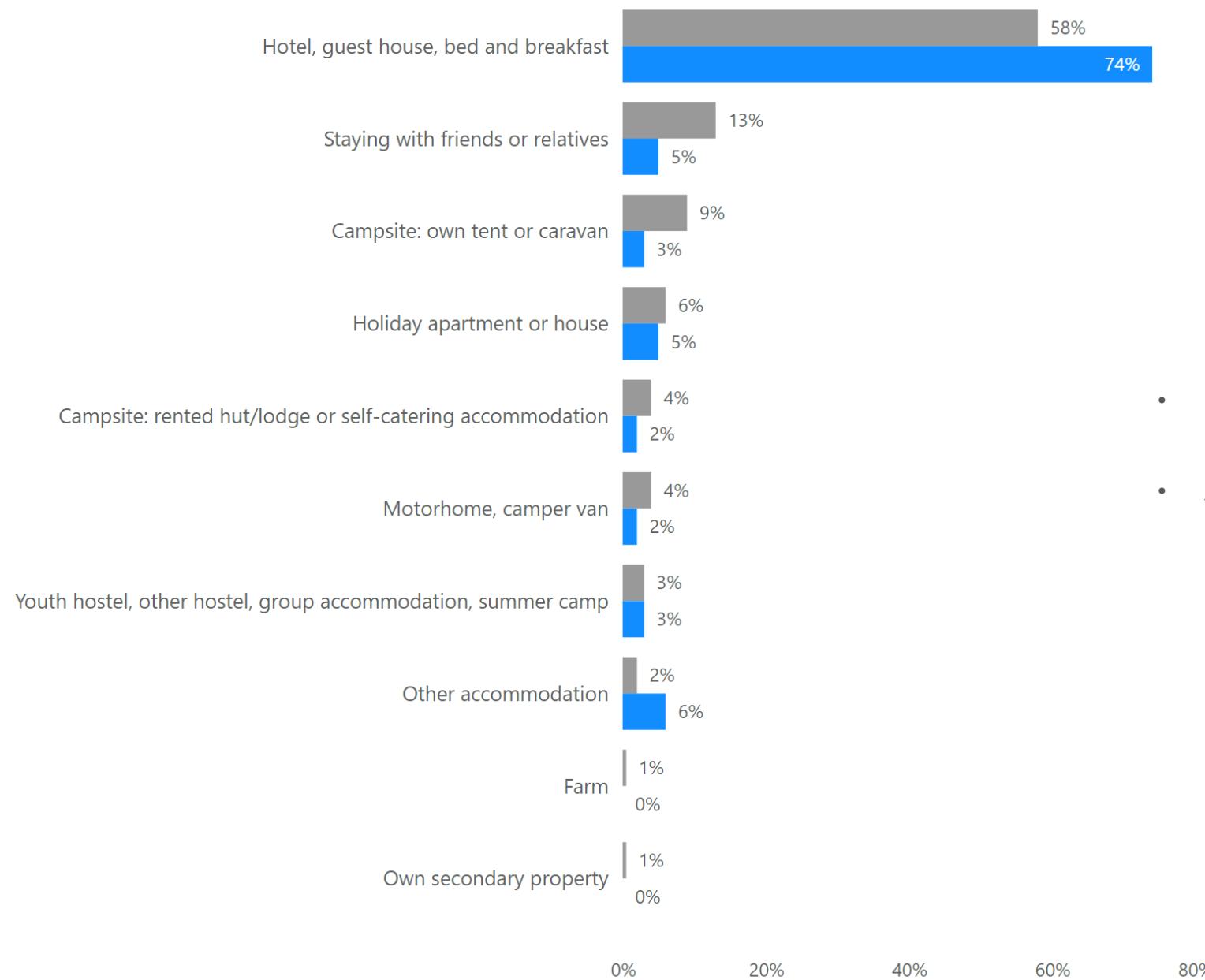
Same-day visitors

● All Inbound ● City (excursion type)



Type of accommodation

● All Inbound ● City (main holiday type)

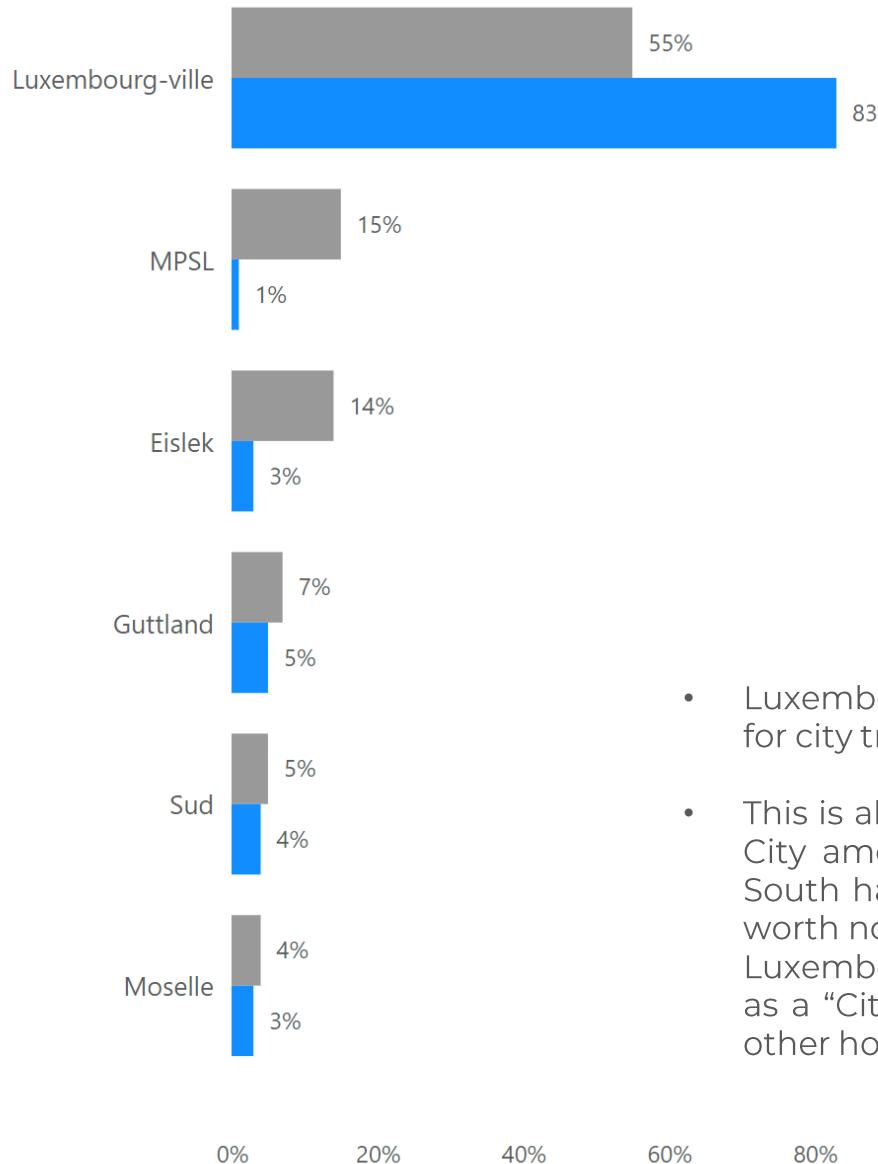


- Hotels are most popular for city trip visitors and more often frequented than by overall visitors.
- All of the other listed accommodations (except for "other accommodation") are mentioned less or equally often by city trip visitors.

Destination region

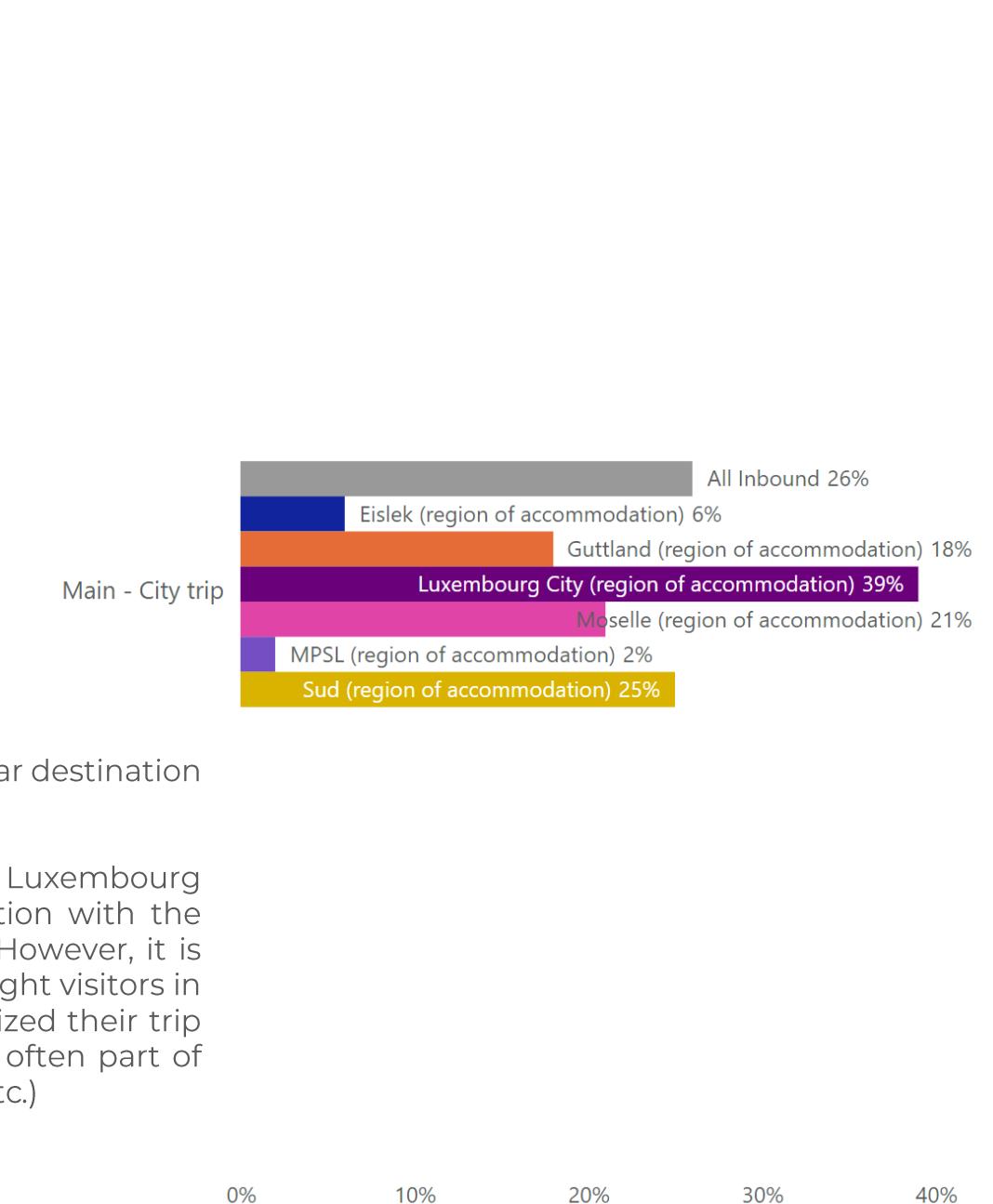
Visitors with overnight

● All Inbound ● City (main holiday type)



Shares by destination region

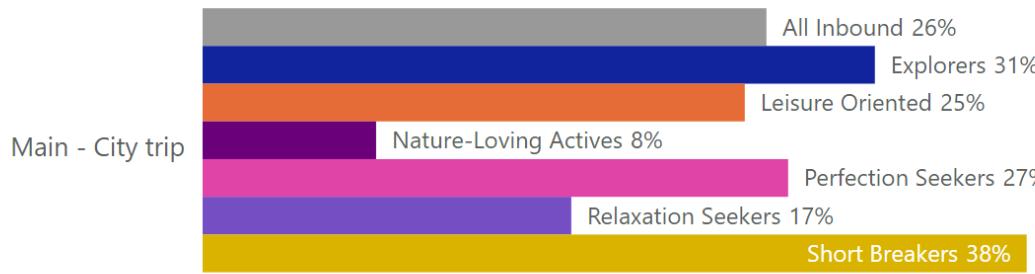
Visitors with overnight



- Luxembourg City is by far the most popular destination for city trip visitors.
- This is also reflected by the prevalence of Luxembourg City among the regions of accommodation with the South having the second highest share. However, it is worth noting that still “only” 39% of overnight visitors in Luxembourg City have actually characterized their trip as a “City break”, so stays in the City are often part of other holiday types (sightseeing, culture etc.)

Shares by target segments

Visitors with overnight



Shares by target segments

Same-day visitors



- Among visitors with overnights, Short Breakers and Explorers are disproportionately often making city trips.
- Among same-day visitors, also Perfection Seekers – in addition to the two aforementioned segments – are also more often than average engaging in city excursions.

0%

10%

20%

30%

40%

0%

10%

20%

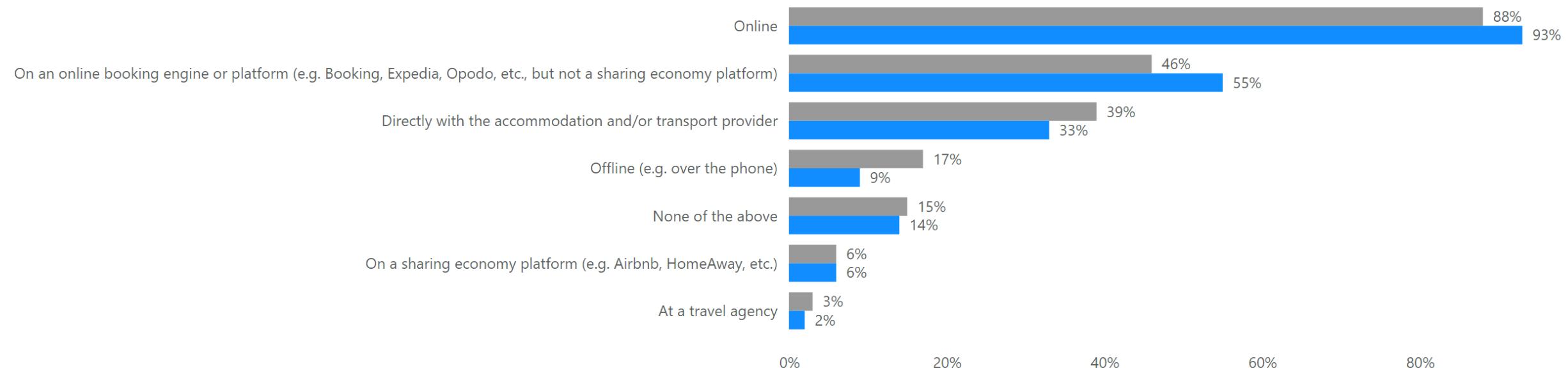
30%

40%

Booking channels

Visitors with overnight

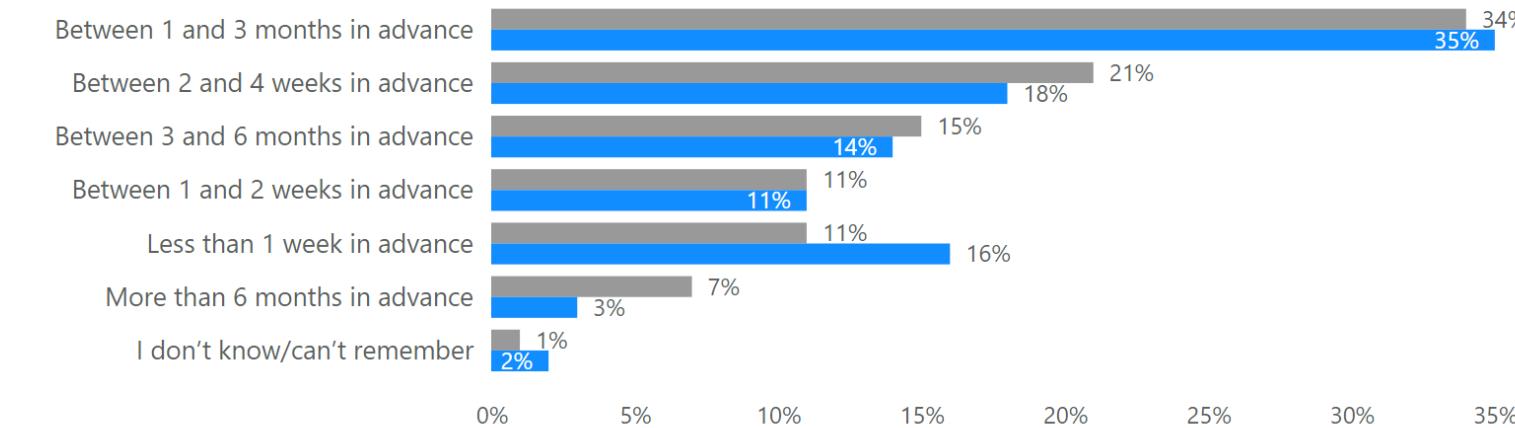
● All Inbound ● City (main holiday type)



Decision moment

Visitors with overnight

● All Inbound ● City (main holiday type)

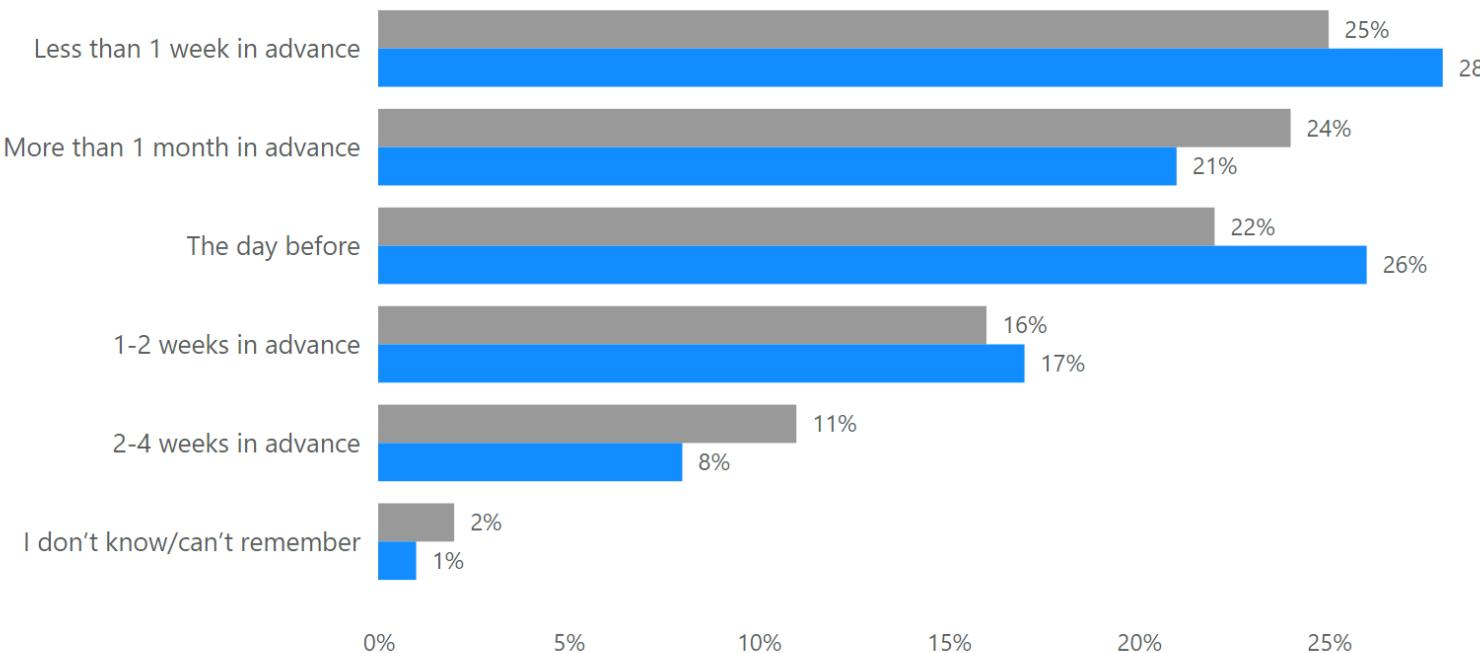


- Online booking channels are used the most, and more often than for overall visitors, by city-trip visitors. Booking directly with the accommodation is less common.
- Regarding the decision moment, city trip travellers show similar patterns to overall inbound visitors except for deciding more often less than 1 week in advance and less often more than 6 months in advance.

Decision moment

Same-day visitors

● All Inbound ● City (excursion type)

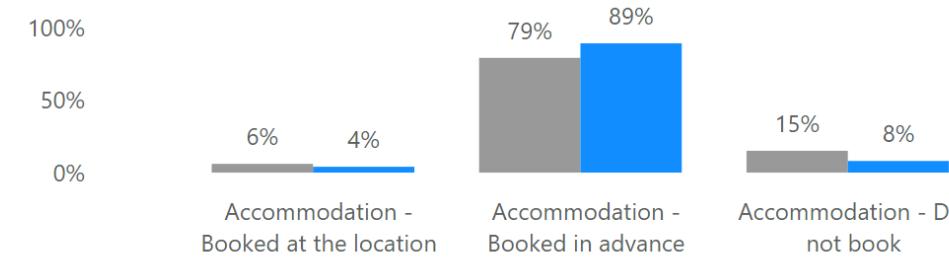


- For same-day city trip visitors, shorter timespans from the decision to the visit are more common.

Booking of travel items

Accommodation

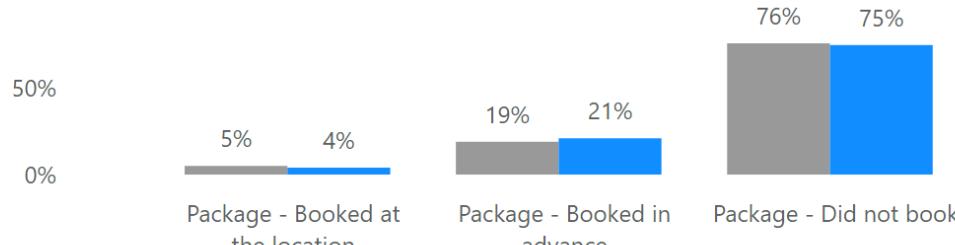
Attribut ● All Inbound ● City (main holiday type)



Booking of travel items

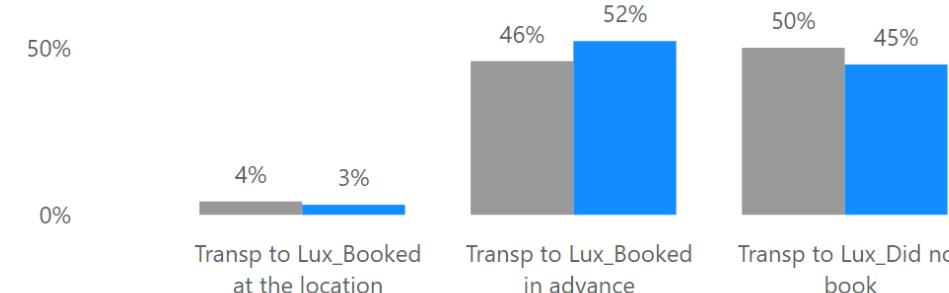
Package

Attribut ● All Inbound ● City (main holiday type)



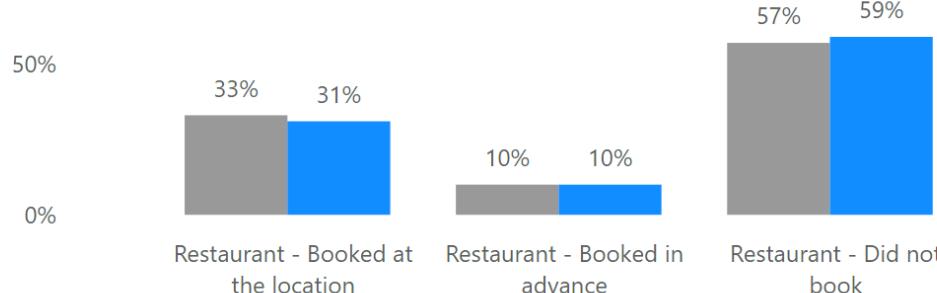
Transport to Luxembourg

Attribut ● All Inbound ● City (main holiday type)



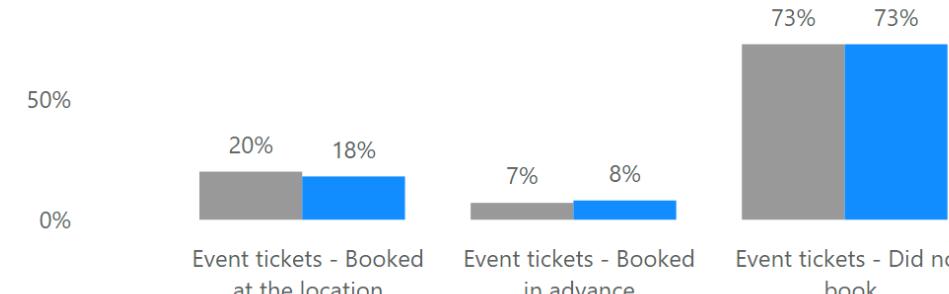
Restaurant

Attribut ● All Inbound ● City (main holiday type)



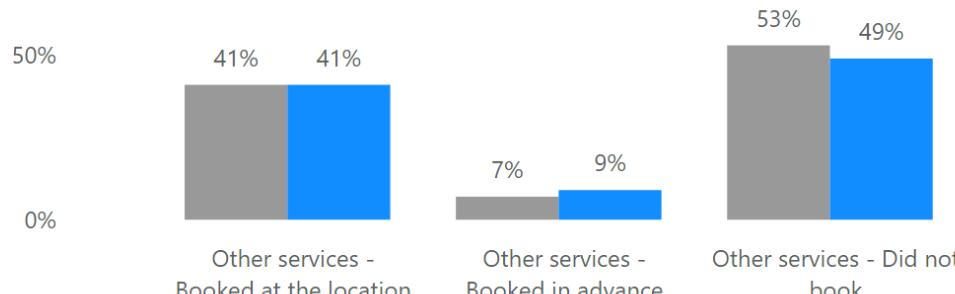
Event tickets

Attribut ● All Inbound ● City (main holiday type)



Other services

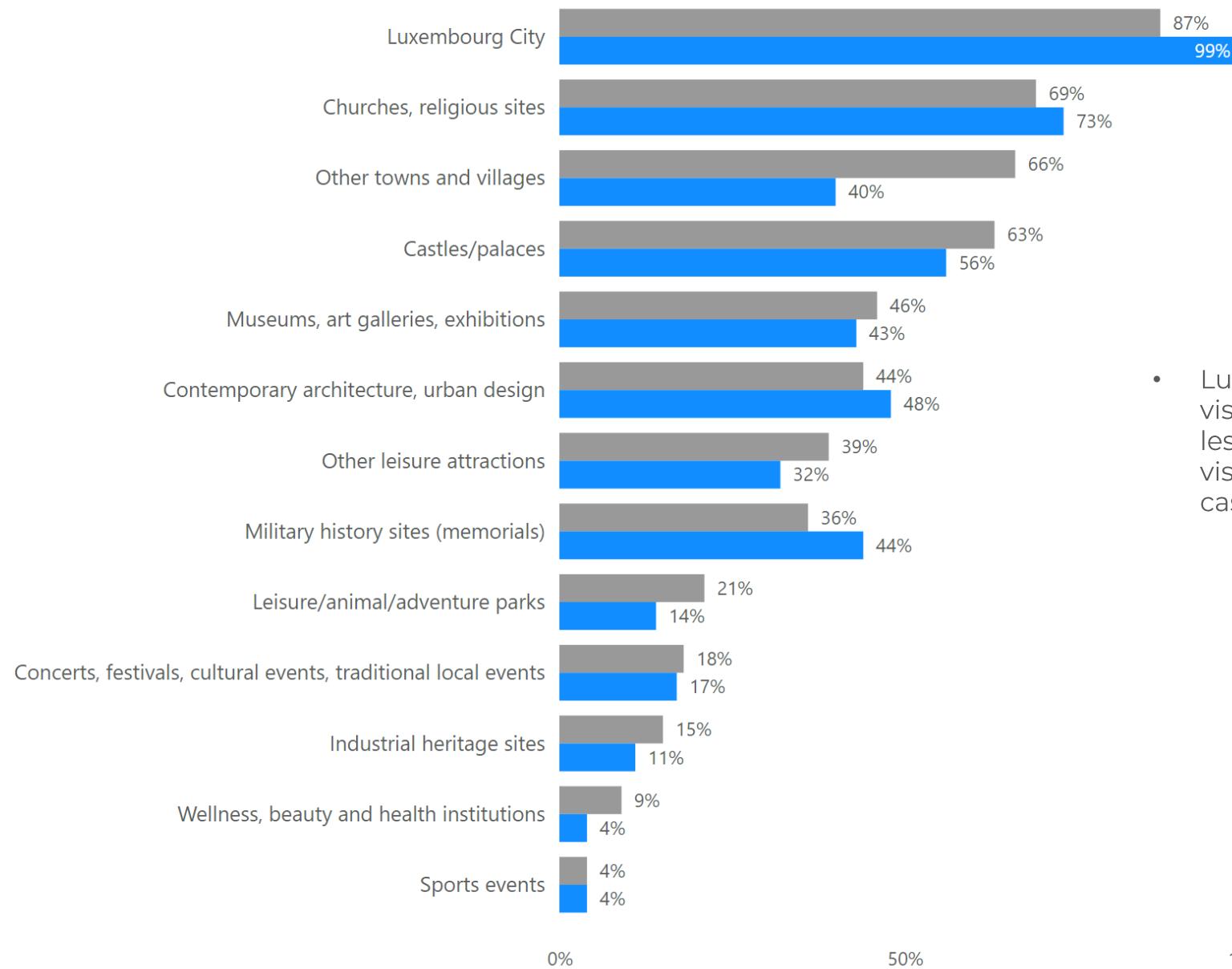
Attribut ● All Inbound ● City (main holiday type)



Places visited

Visitors with overnight

● All Inbound ● City (main holiday type)

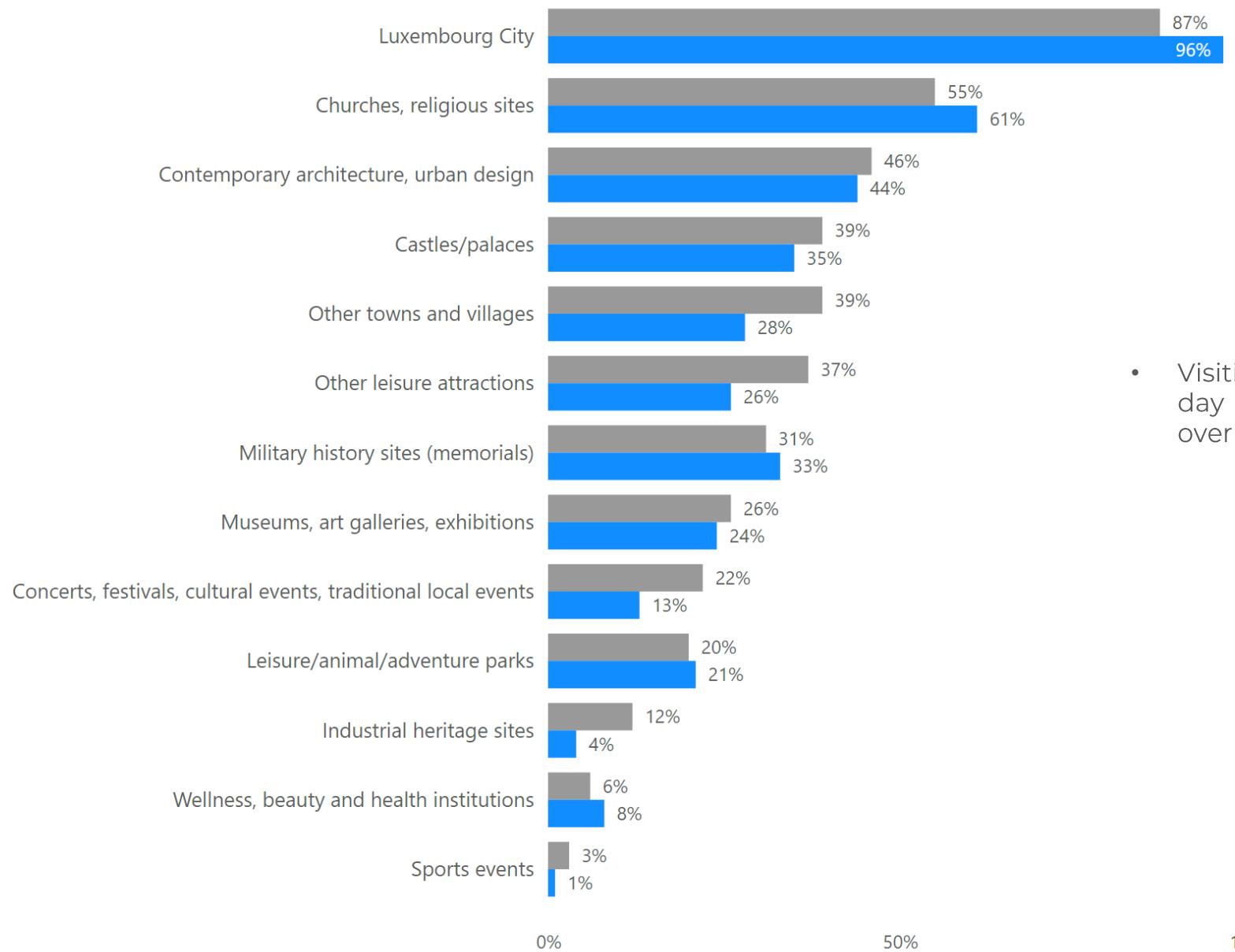


- Luxembourg City is visited by almost every city trip visitor during their visit. Other towns and villages are far less often visited. Military history sites are more often visited when compared to all inbound visitors while castles and leisure sites are comparatively less popular.

Places visited

Same-day visitors

● All Inbound ● City (excursion type)

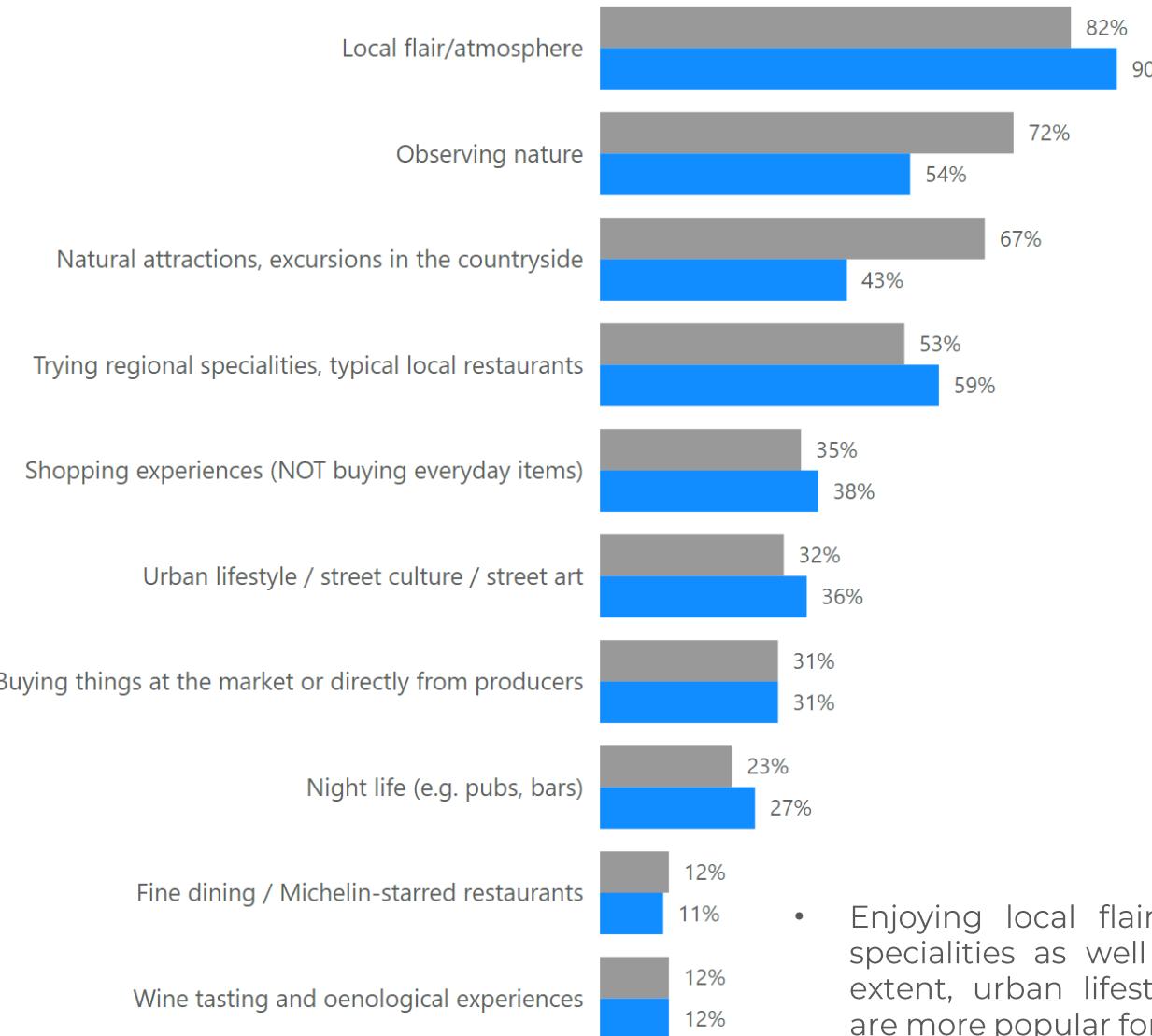


- Visiting patterns and ratios to overall visitors for same-day city visitors resemble those of city visitors with overnights.

Non-sporting activities

Visitors with overnight

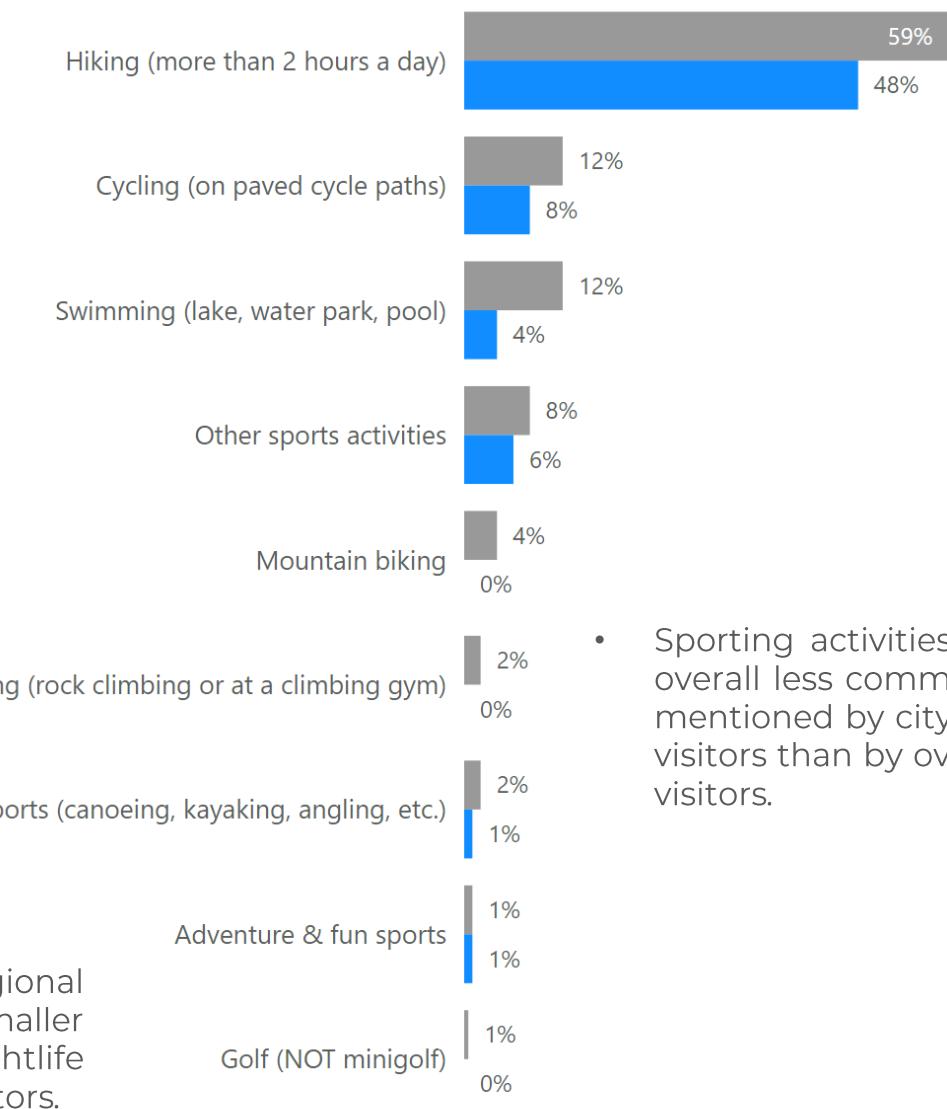
● All Inbound ● City (main holiday type)



Sporting activities

Visitors with overnight

● All Inbound ● City (main holiday type)



- Enjoying local flair, trying regional specialities as well as, to a smaller extent, urban lifestyle and nightlife are more popular for city trip visitors.

- Sporting activities are overall less commonly mentioned by city trip visitors than by overall visitors.

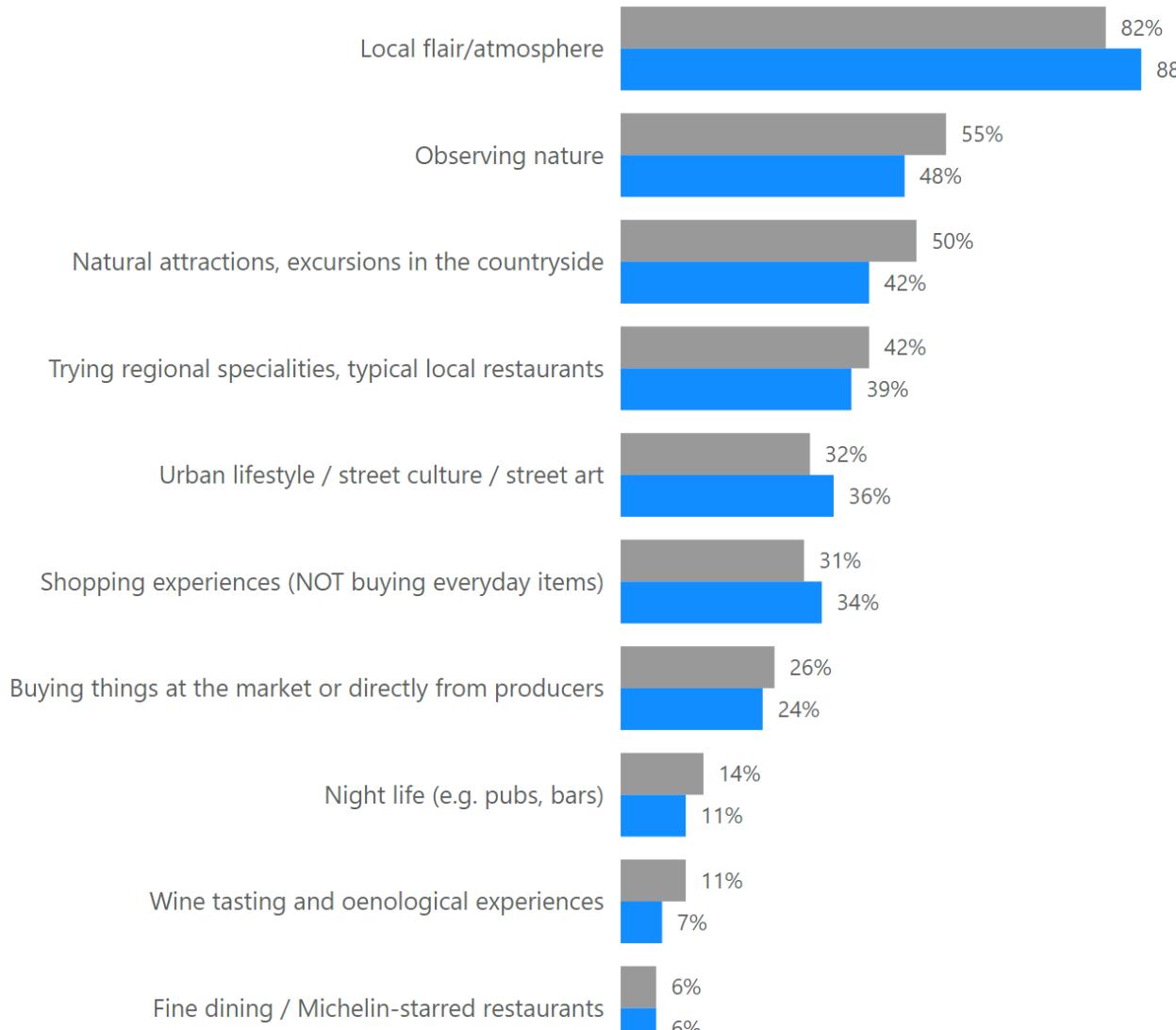
0% 20% 40% 60% 80%

0% 50%

Non-sporting activities

Same-day visitors

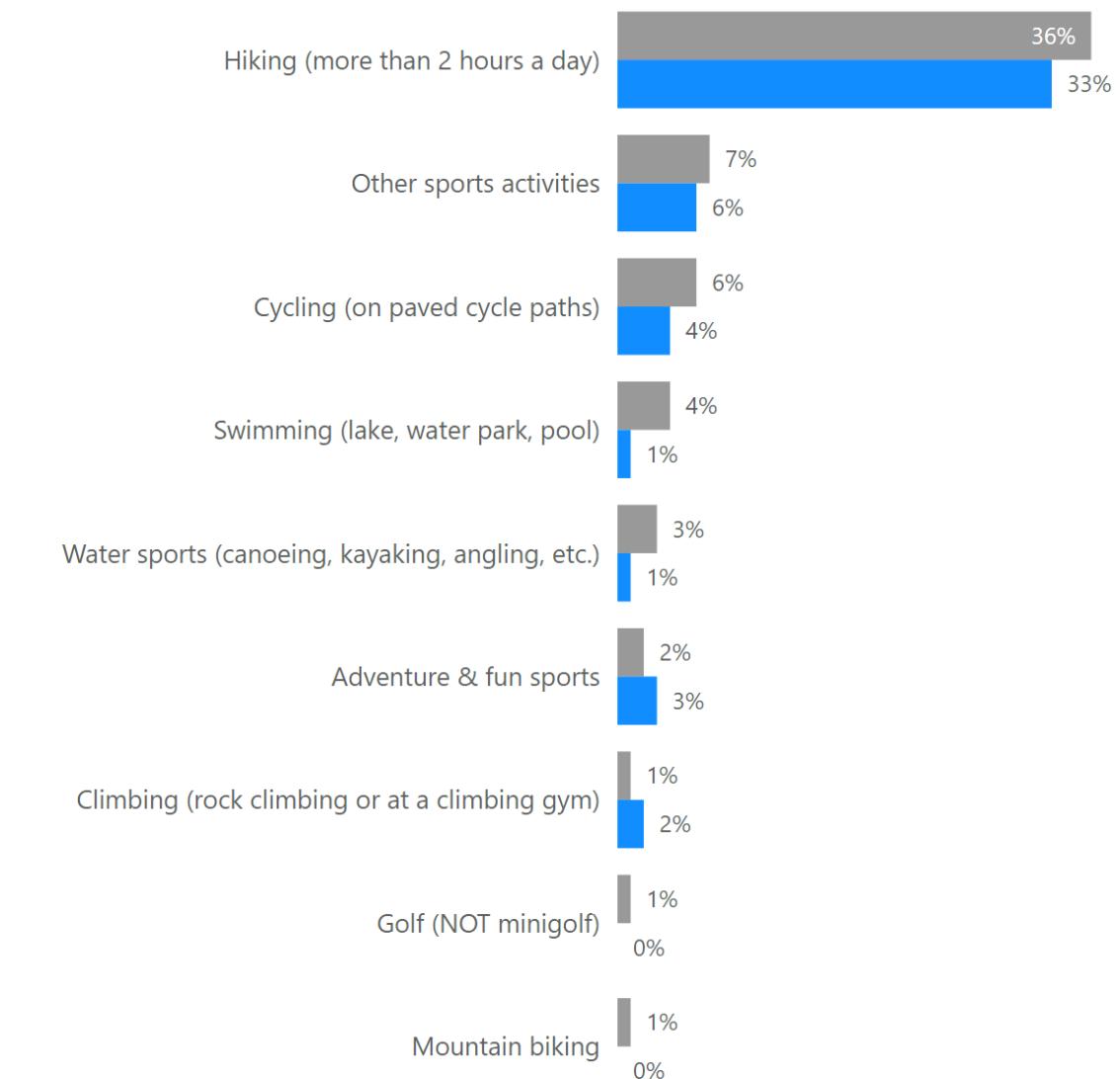
● All Inbound ● City (excursion type)



Sporting activities

Same-day visitors

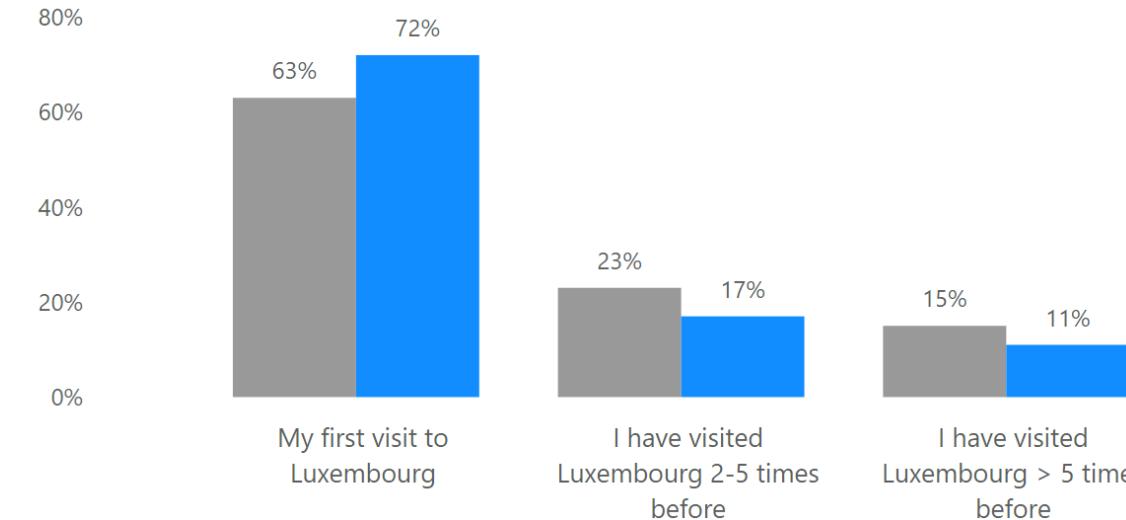
● All Inbound ● City (excursion type)



Frequency of visit

Visitors with overnight

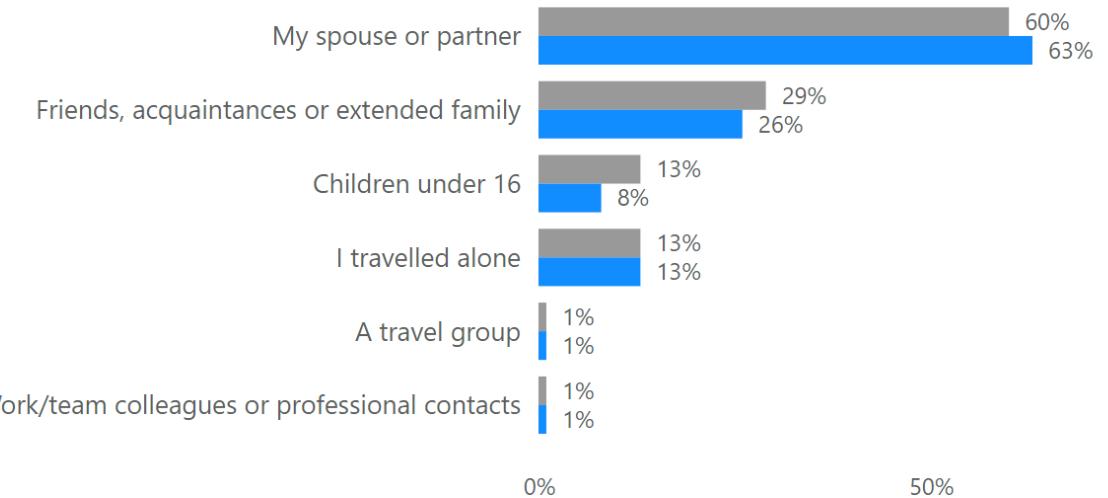
● All Inbound ● City (main holiday type)



Travel party

Visitors with overnight

● All Inbound ● City (main holiday type)



First-time visitors

Visitors with overnight

72%

City (main holiday type)

63%

All Inbound

- City trip visitors tend to be more often first-time visitors.
- They travel less often with children but apart from that show similar shares in regard to their travel party with all inbound travellers.

Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

33%

City (main holiday type)

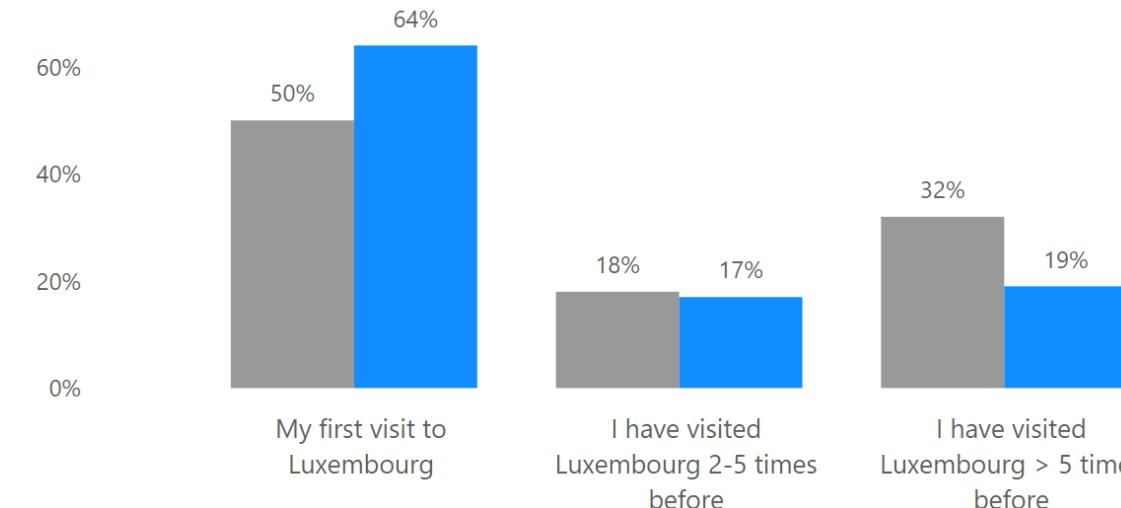
39%

All Inbound

Frequency of visit

Same-day visitors

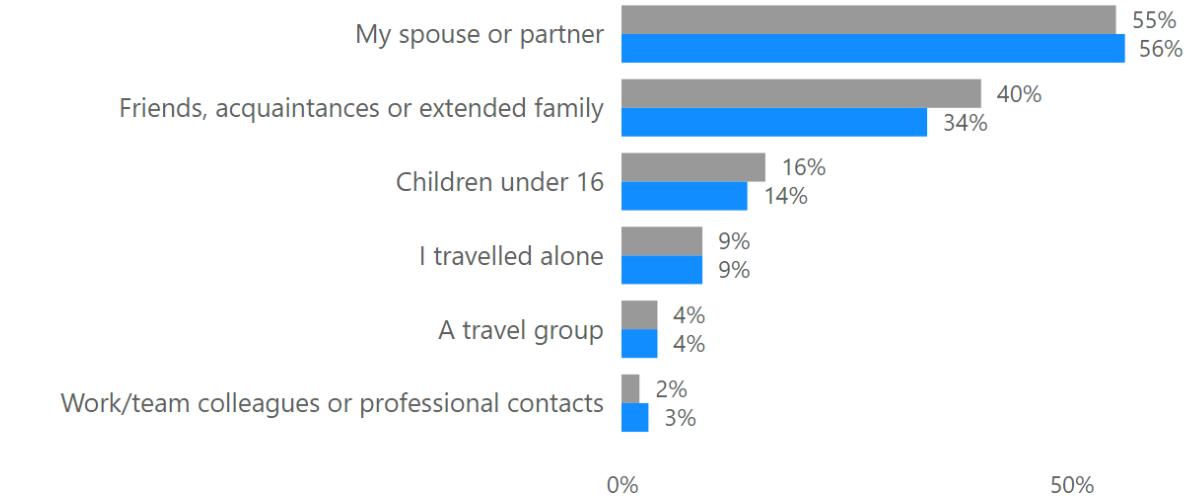
● All Inbound ● City (excursion type)



Travel party

Same-day visitors

● All Inbound ● City (excursion type)



First-time visitors

Same-day visitors

64%

City (excursion type)

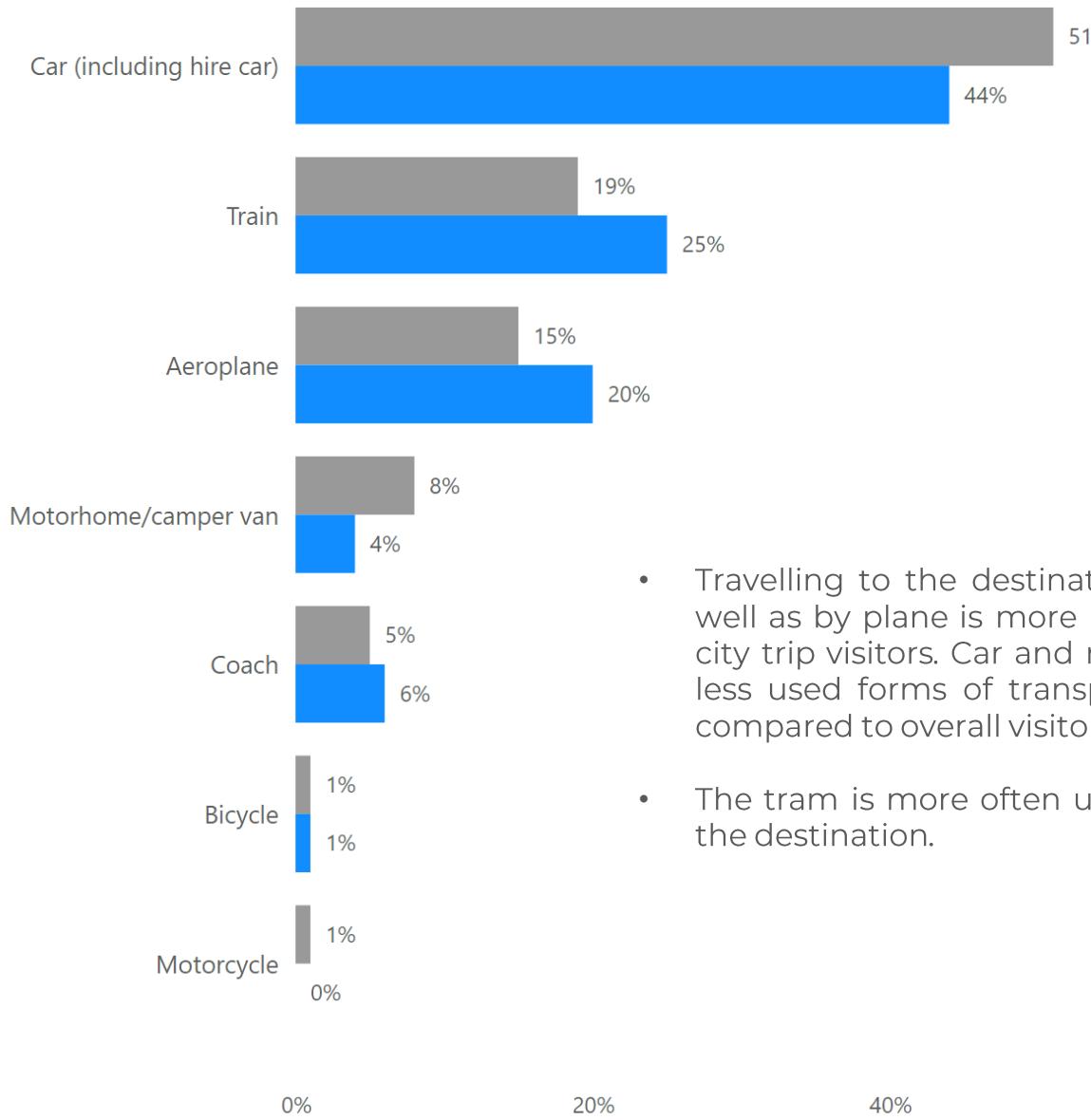
50%

All Inbound

Transport to destination

Visitors with overnight

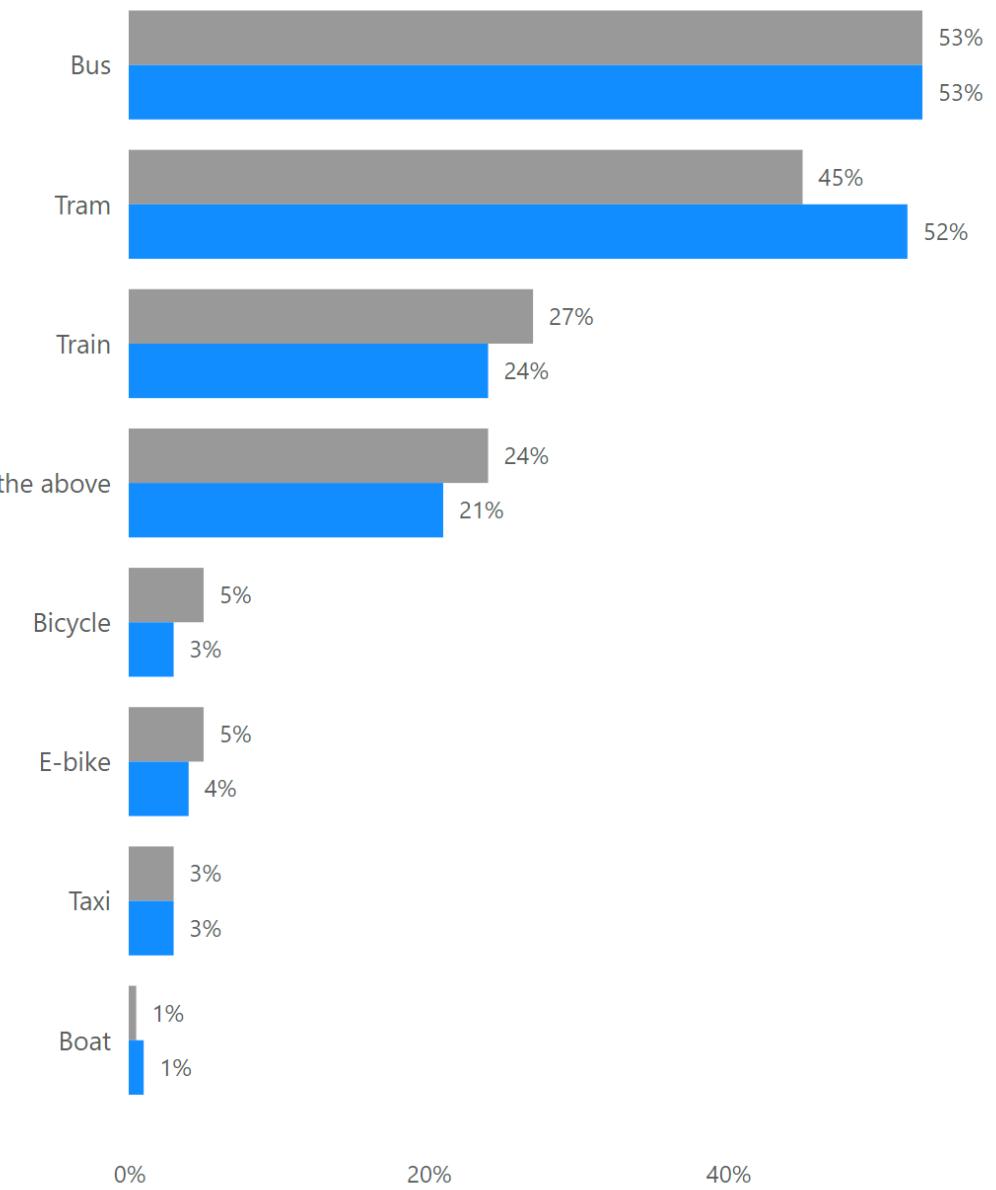
● All Inbound ● City (main holiday type)



Transport in destination

Visitors with overnight

● All Inbound ● City (main holiday type)

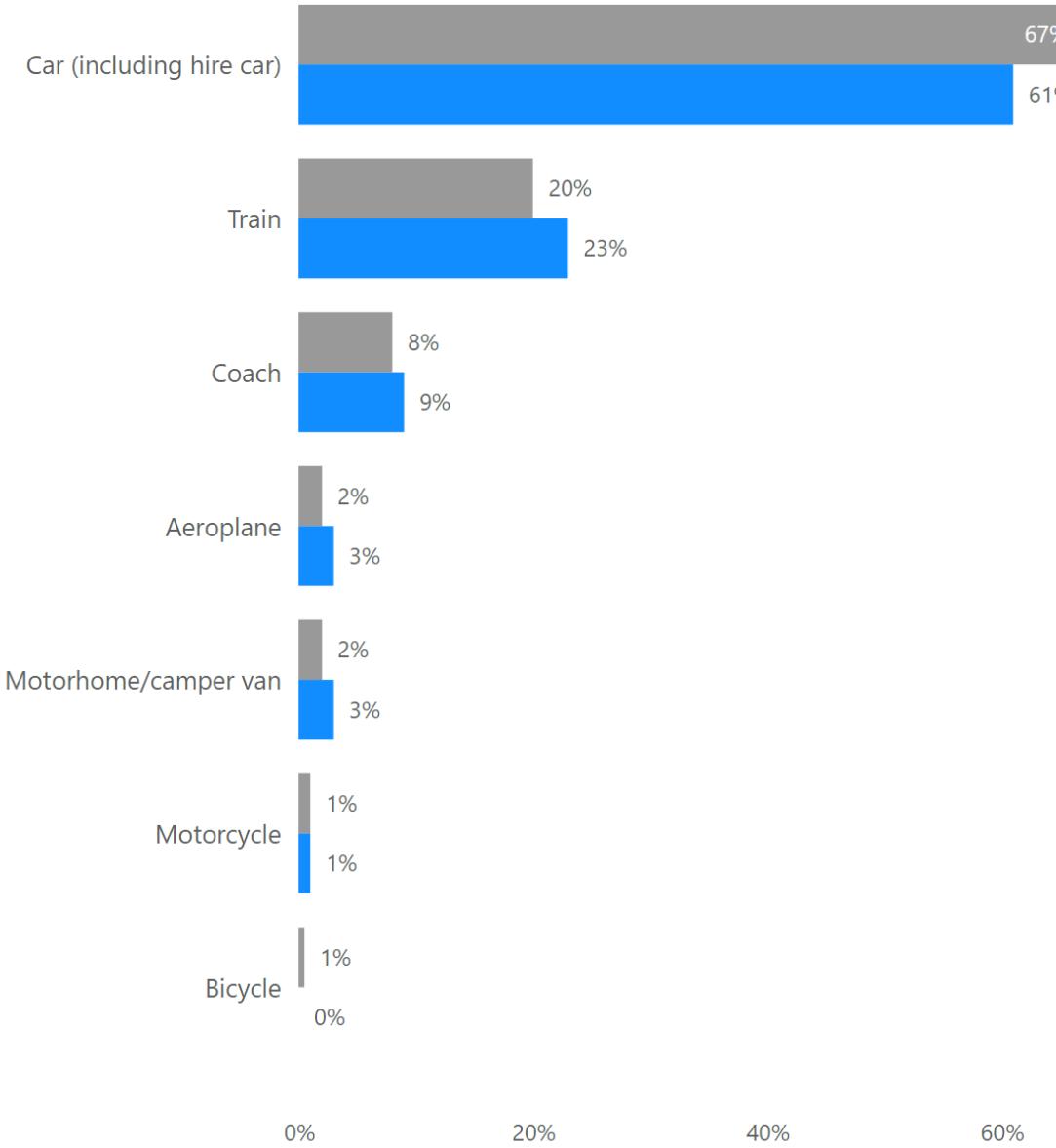


- Travelling to the destination by train as well as by plane is more popular among city trip visitors. Car and motorhome are less used forms of transportation when compared to overall visitors.
- The tram is more often used to travel in the destination.

Transport to destination

Same-day visitors

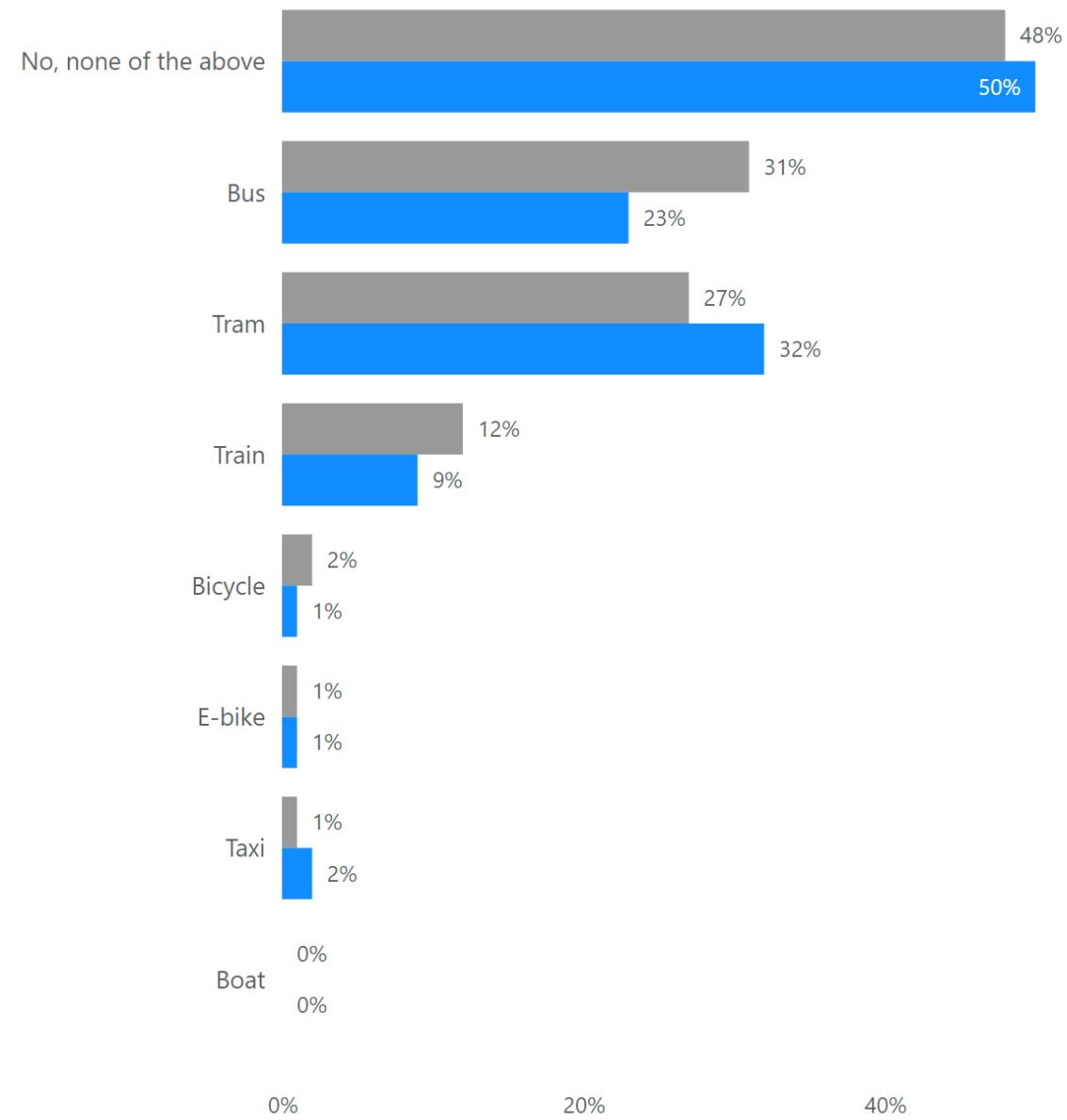
● All Inbound ● City (excursion type)



Transport in destination

Same-day visitors

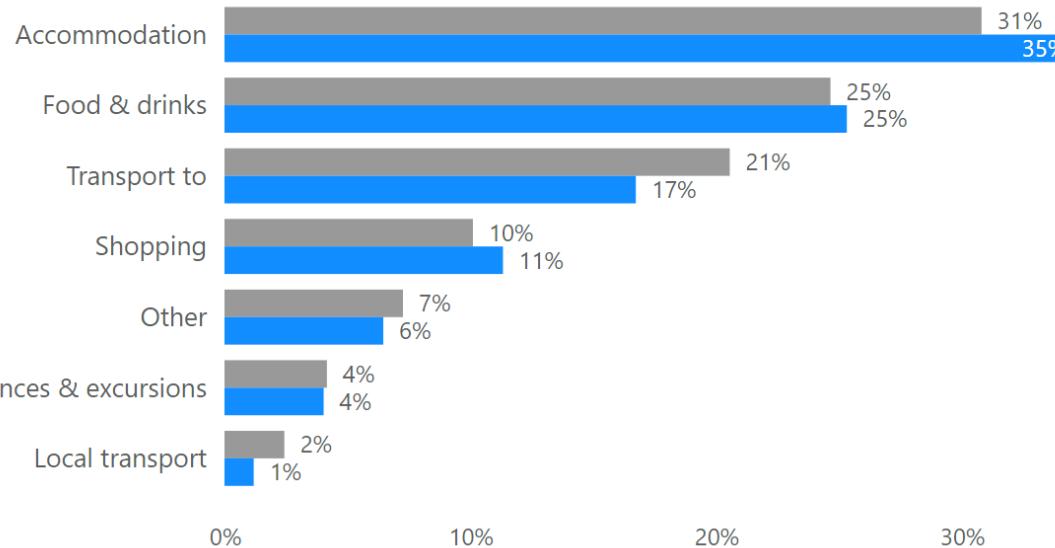
● All Inbound ● City (excursion type)



Spending categories

Visitors with overnight

● All Inbound ● City (main holiday type)

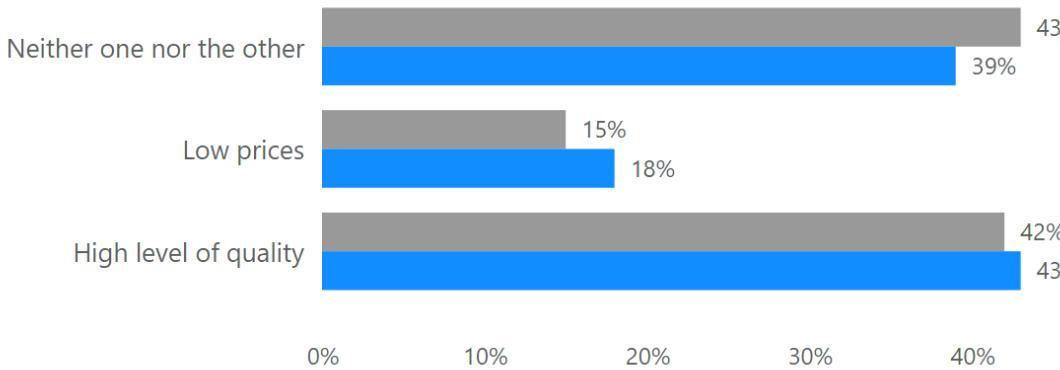


- City trip visitors spend slightly more money on accommodation and slightly less on transport.

Quality vs. price orientation

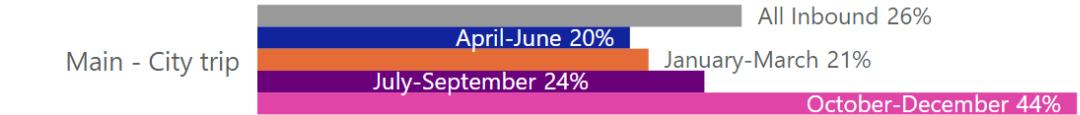
Visitors with overnight

● All Inbound ● City (main holiday type)



Shares by arrival months

Visitors with overnight



- In October-December a much higher share of all overnight visitors engage in city trips.
- City trip visitors tend spend more per person per night and stay less long.

Spend/pers./trip

Visitors with overnight

524 €

City (main holiday type)

Spend/pers./night

Visitors with overnight

179 €

City (main holiday type)

Length of stay (nights)

Visitors with overnight

2,9

City (main holiday type)

619 €

All Inbound

160 €

All Inbound

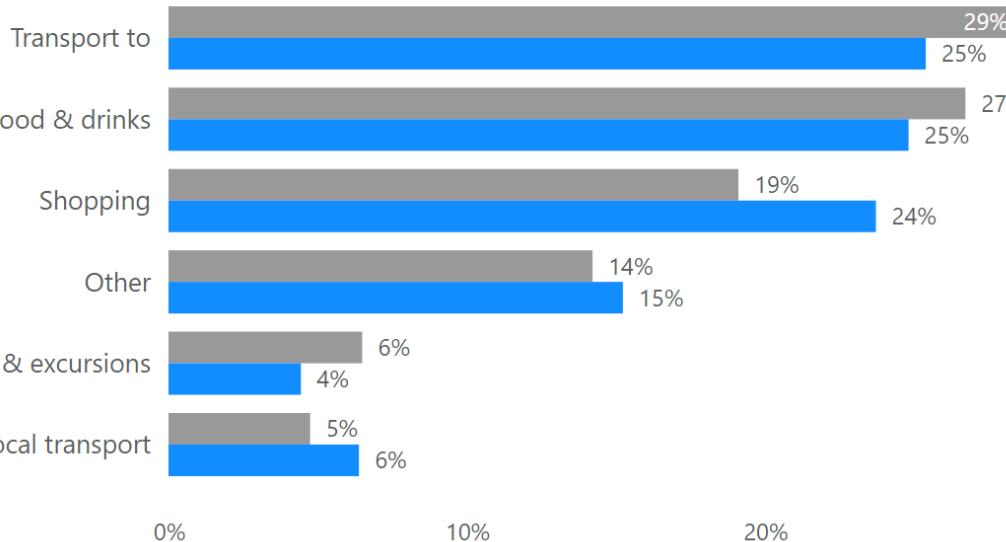
3,9

All Inbound

Spending categories

Same-day visitors

● All Inbound ● City (excursion type)



Spend/pers./excurs.

Same-day visitors

224 €

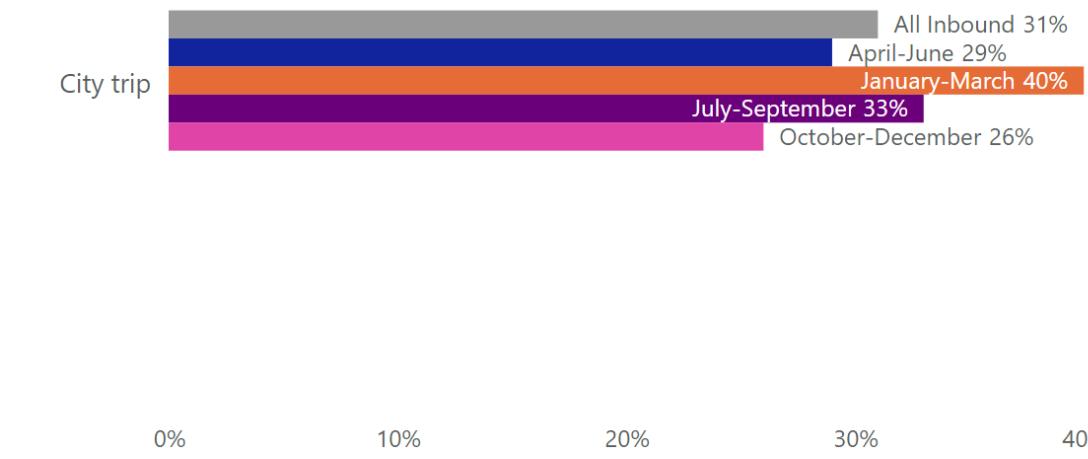
City (excursion type)

245 €

All Inbound

Shares by arrival months

Same-day visitors

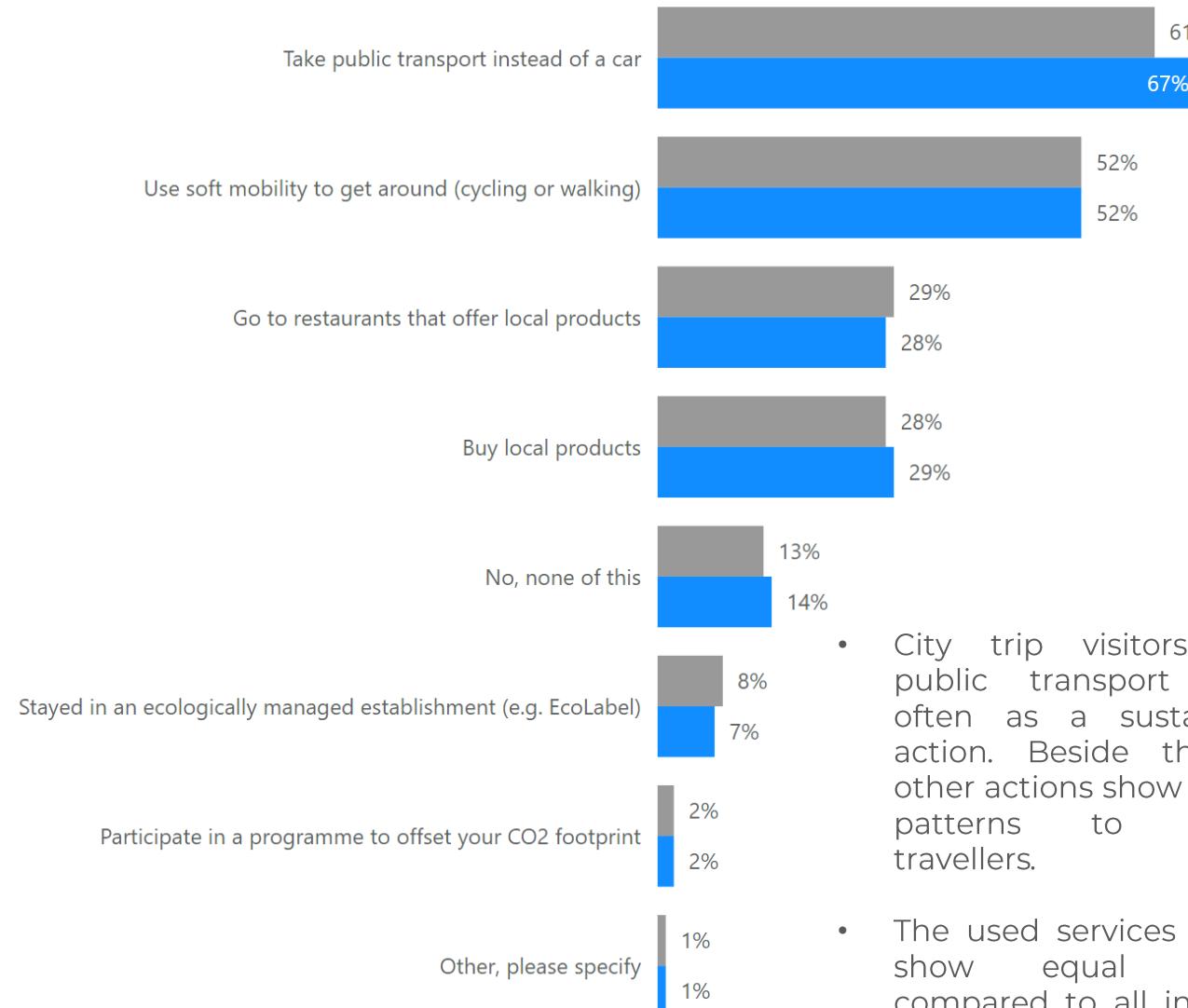


- For same-day city trip visitors, expenditure on shopping is elevated in comparison to overall visitors.
- A higher-than-average share of same-day visitors in January-March engage in city excursions.

Sustainable actions during stay

Visitors with overnight

● All Inbound ● City (main holiday type)

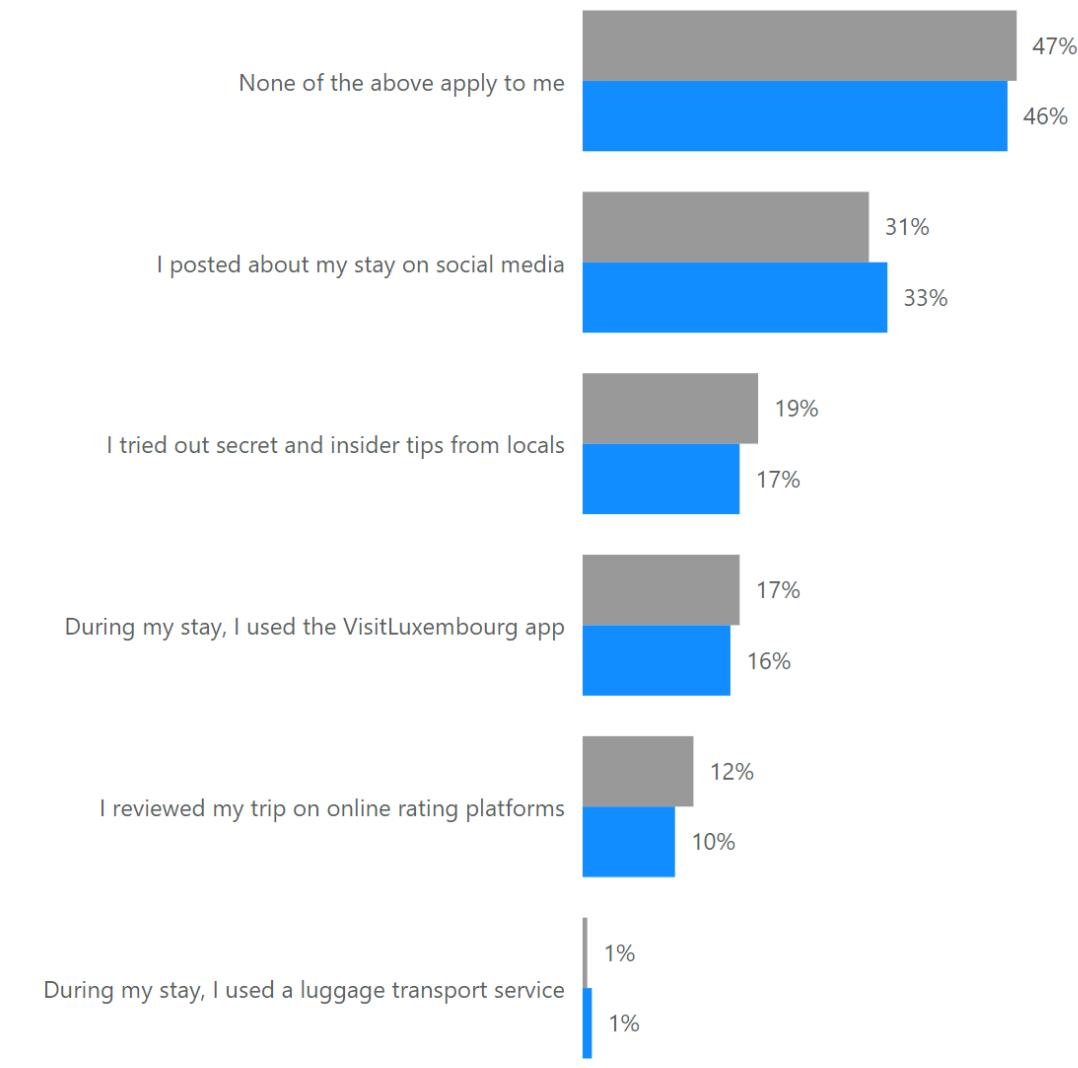


- City trip visitors take public transport more often as a sustainable action. Beside this, all other actions show similar patterns to overall travellers.
- The used services overall show equal shares compared to all inbound visitors.

Services used during stay

Visitors with overnight

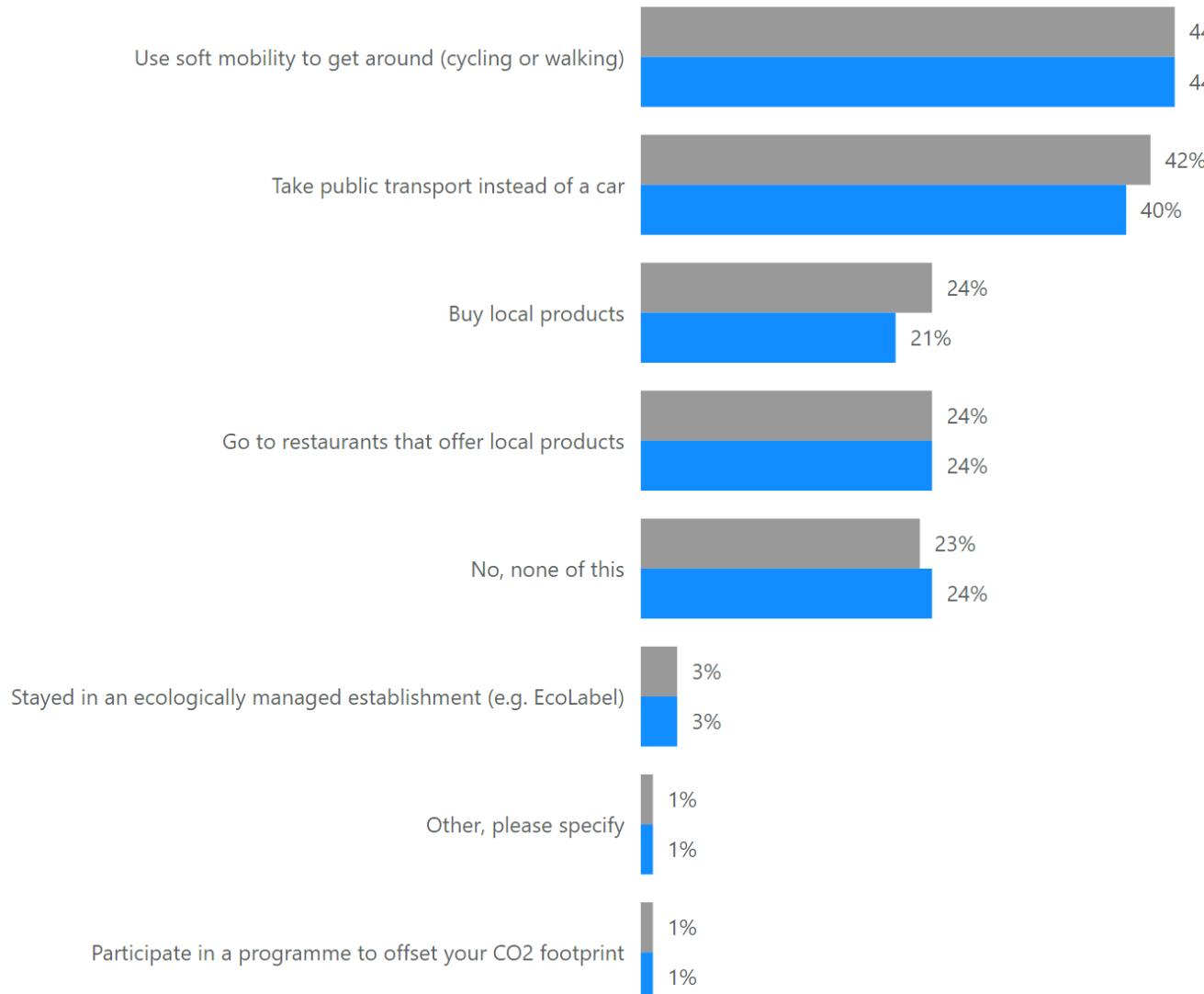
● All Inbound ● City (main holiday type)



Sustainable actions during stay

Same-day visitors

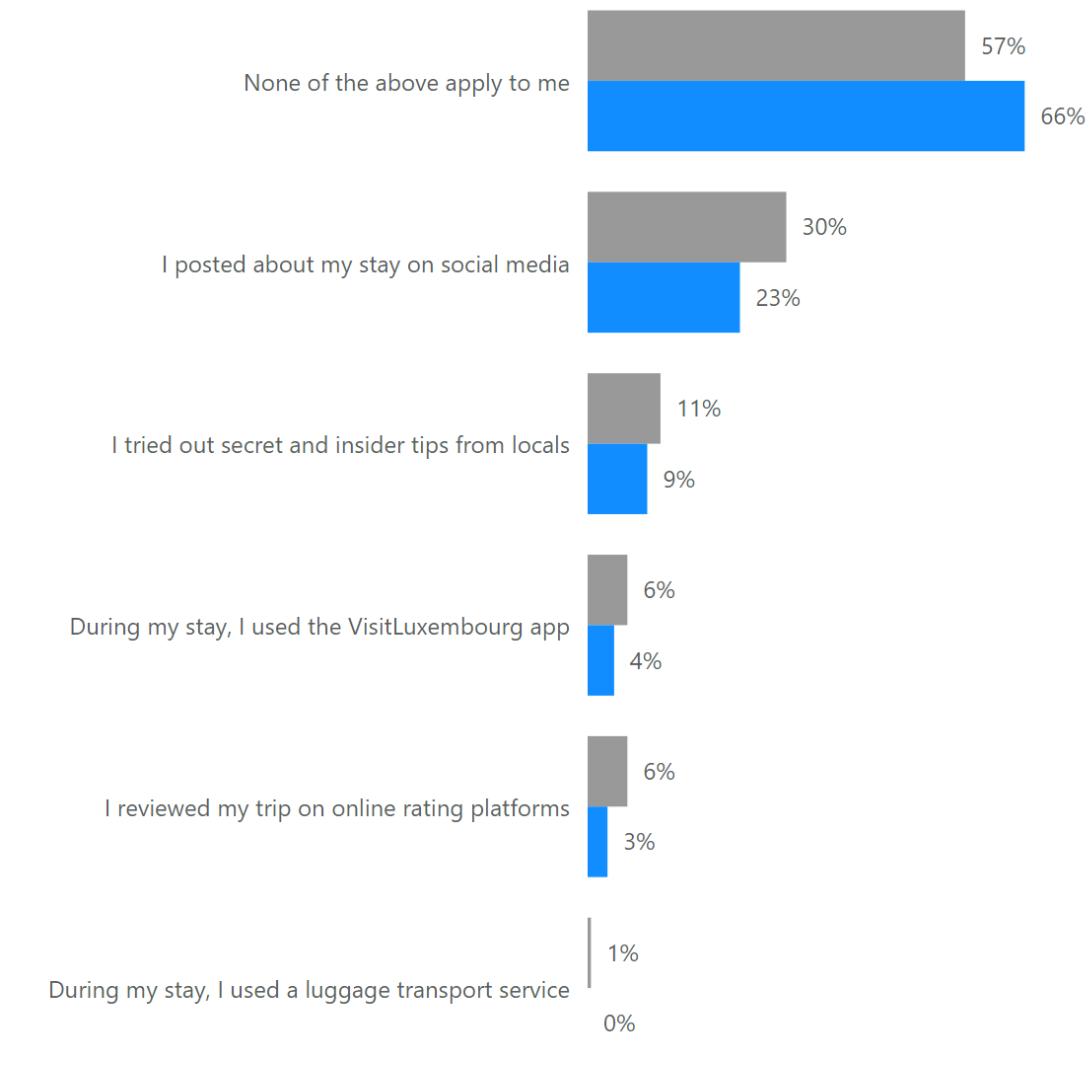
● All Inbound ● City (excursion type)



Services used during stay

Same-day visitors

● All Inbound ● City (excursion type)

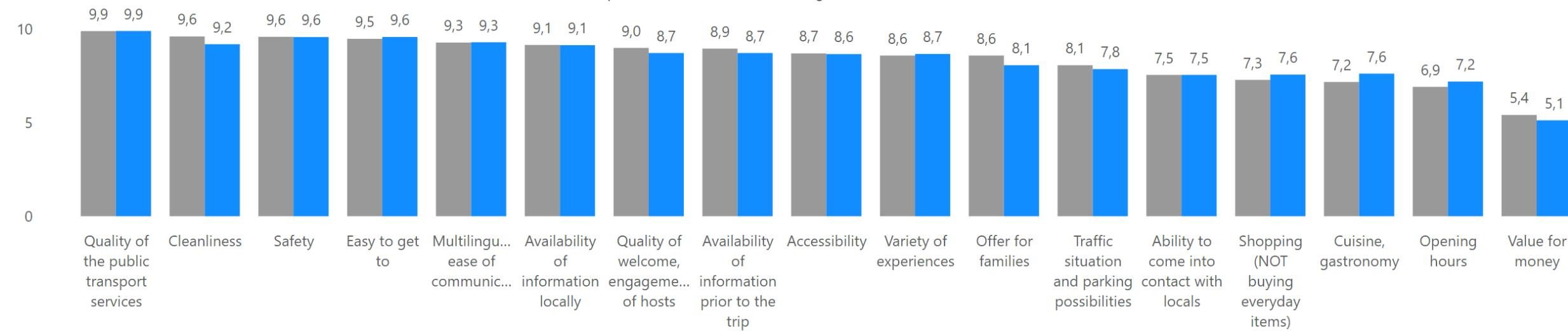


Satisfaction items

Visitors with overnight

Attribut ● All Inbound ● City (main holiday type)

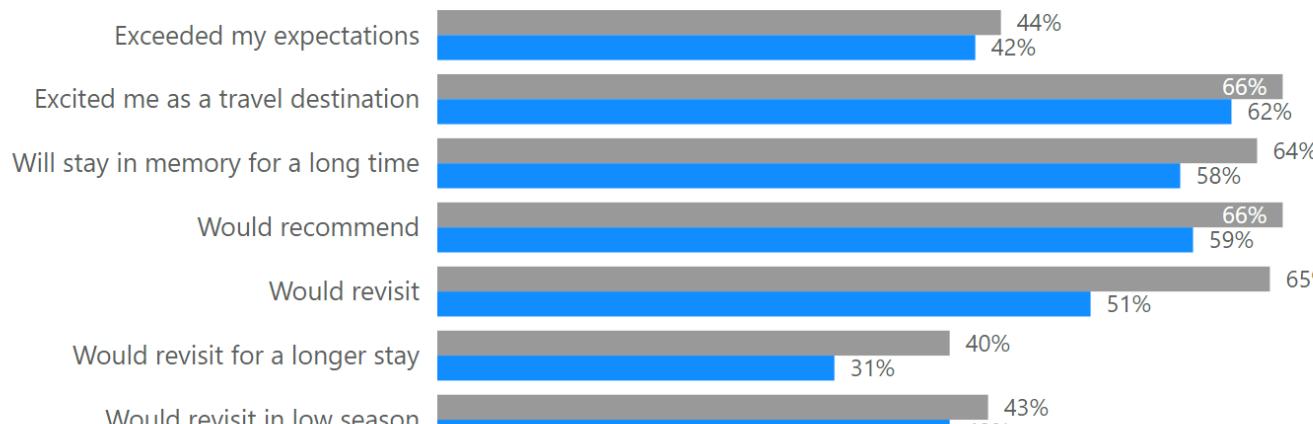
- City trip visitors indicate similar satisfaction scores for most items compared to all inbound visitors. Satisfaction with offers for families is slightly lower and is slightly higher for gastronomy. Overall satisfaction (% of "strongly agree") is lower across all categories for city trip visitors. Restaurants are less often seen as a reason for poor value-for-money.



Overall satisfaction - % "strongly agree"

Visitors with overnight

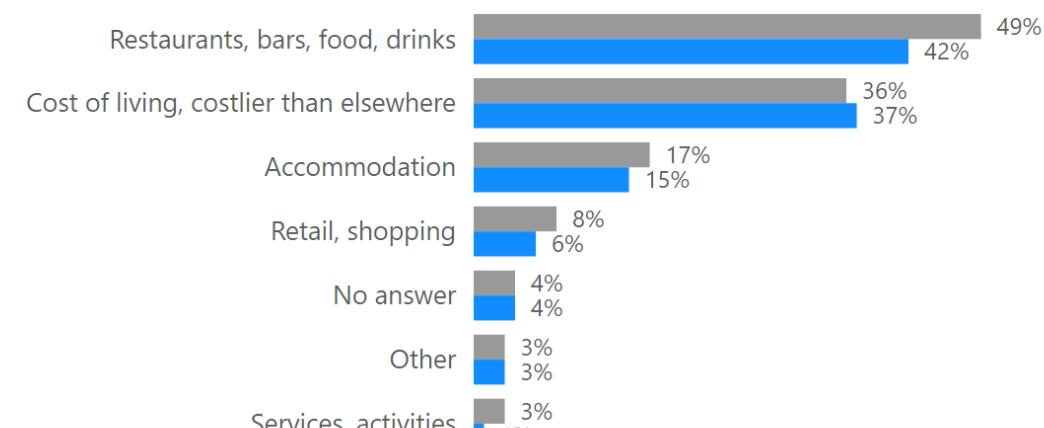
Attribut ● All Inbound ● City (main holiday type)



Reasons for poor value-for-money

Visitors with overnight

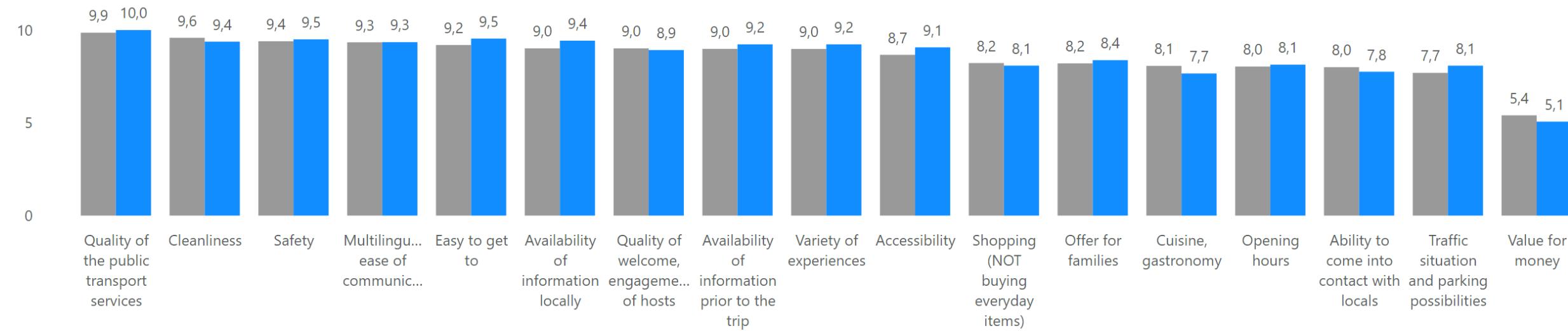
Attribut ● All Inbound ● City (main holiday type)



Satisfaction items

Same-day visitors

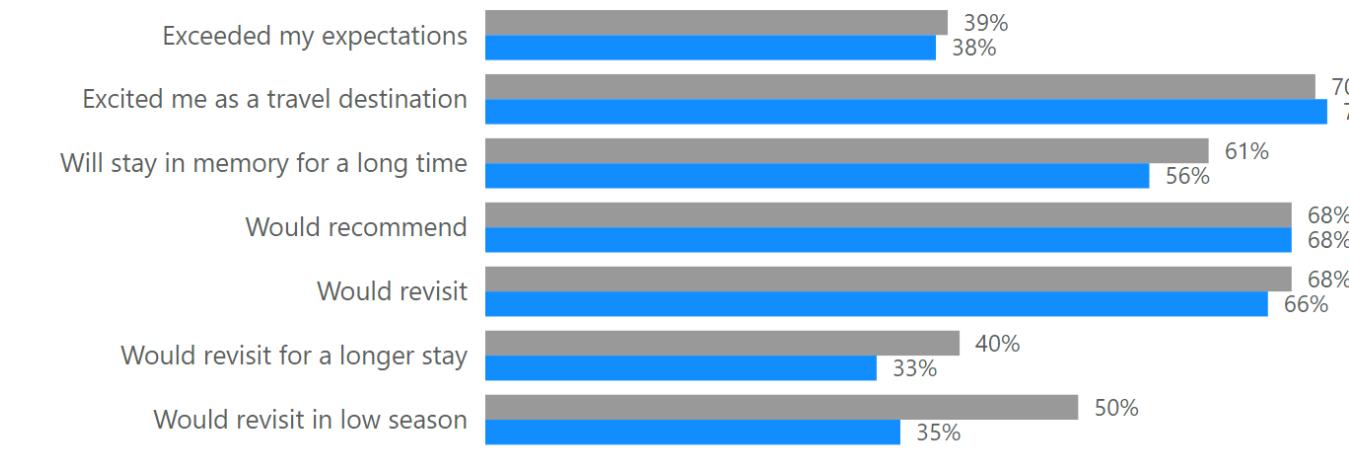
Attribut ● All Inbound ● City (excursion type)



Overall satisfaction - % "strongly agree"

Same-day visitors

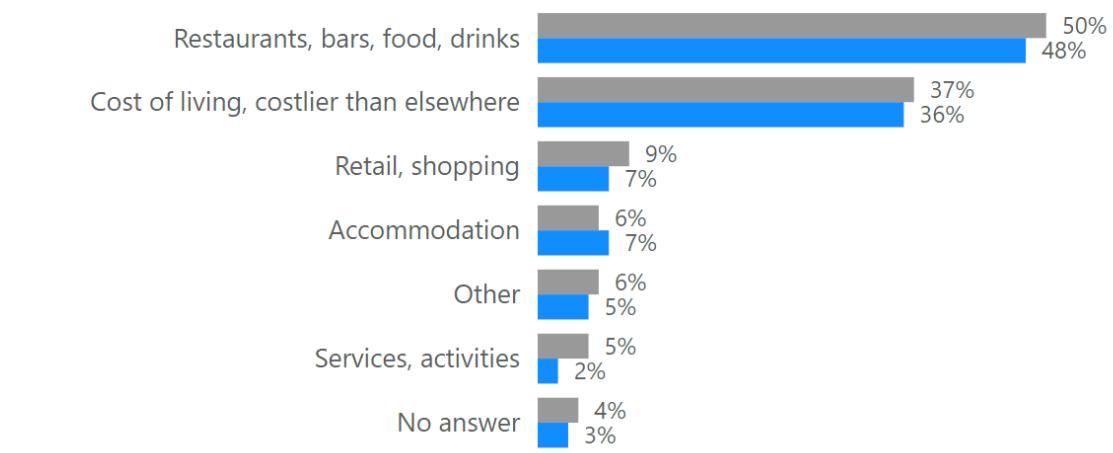
Attribut ● All Inbound ● City (excursion type)



Reasons for poor value-for-money

Same-day visitors

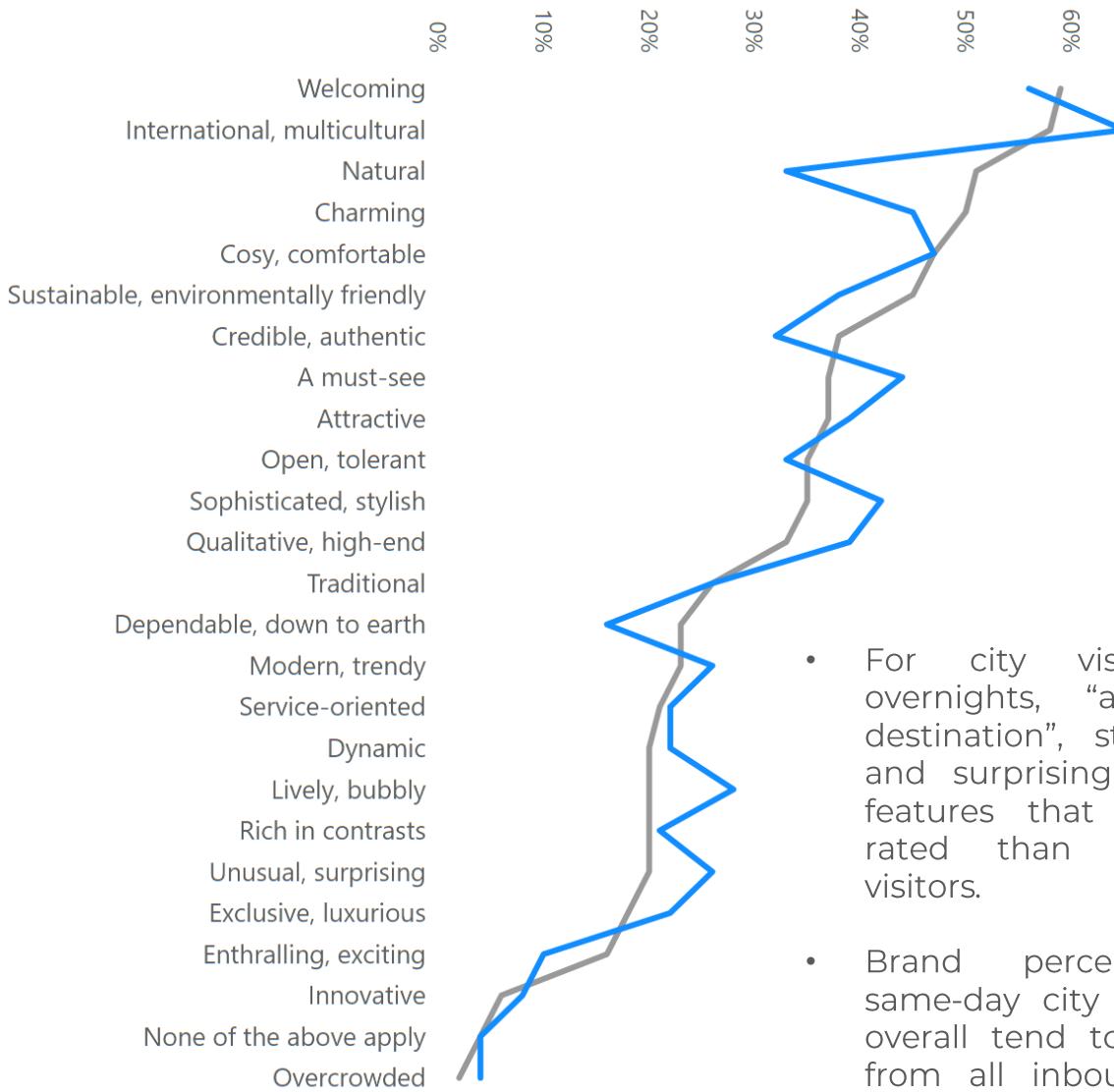
Attribut ● All Inbound ● City (excursion type)



Brand features

Visitors with overnight

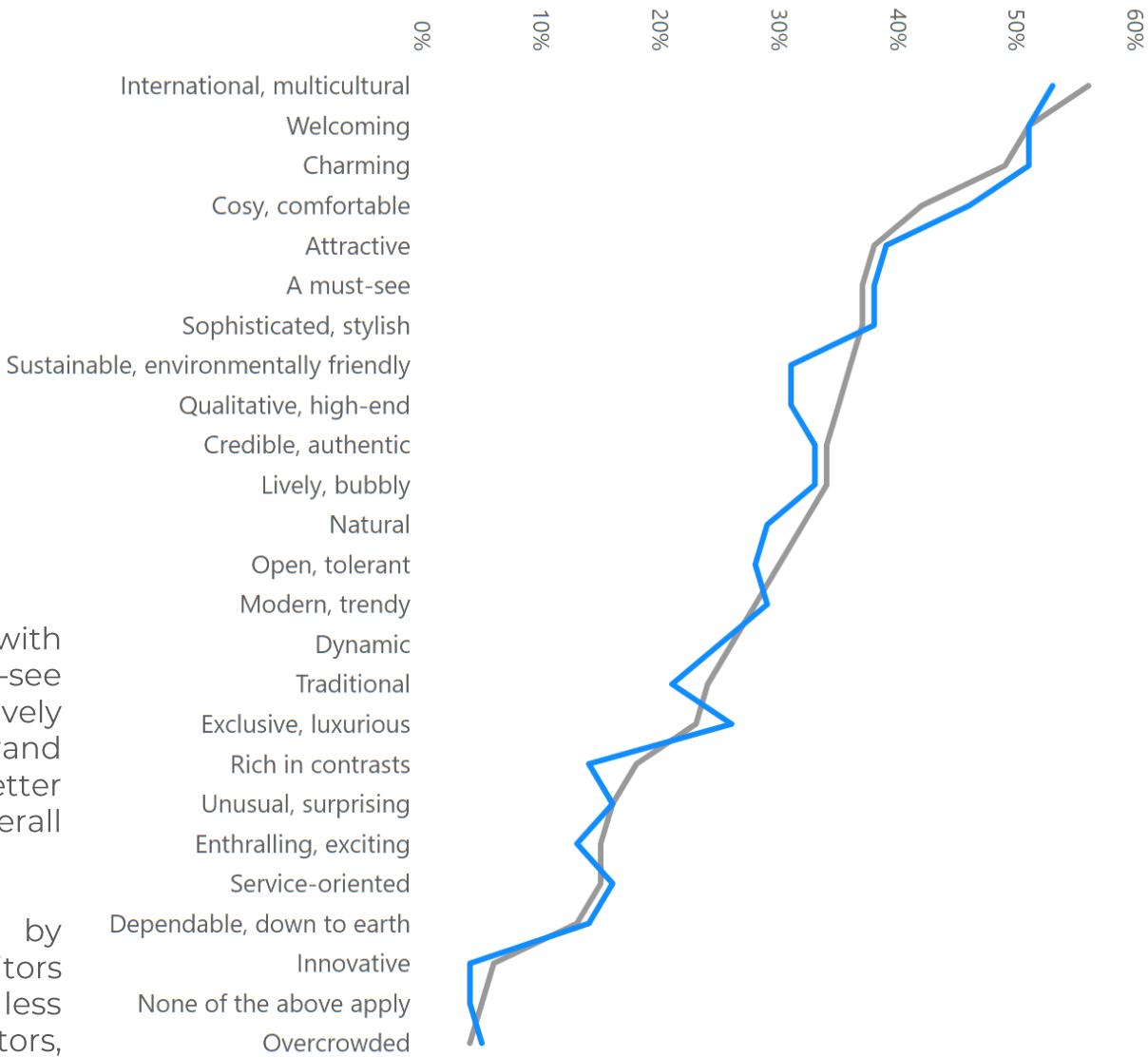
● All Inbound ● City (main holiday type)



Brand features

Same-day visitors

● All Inbound ● City (excursion type)

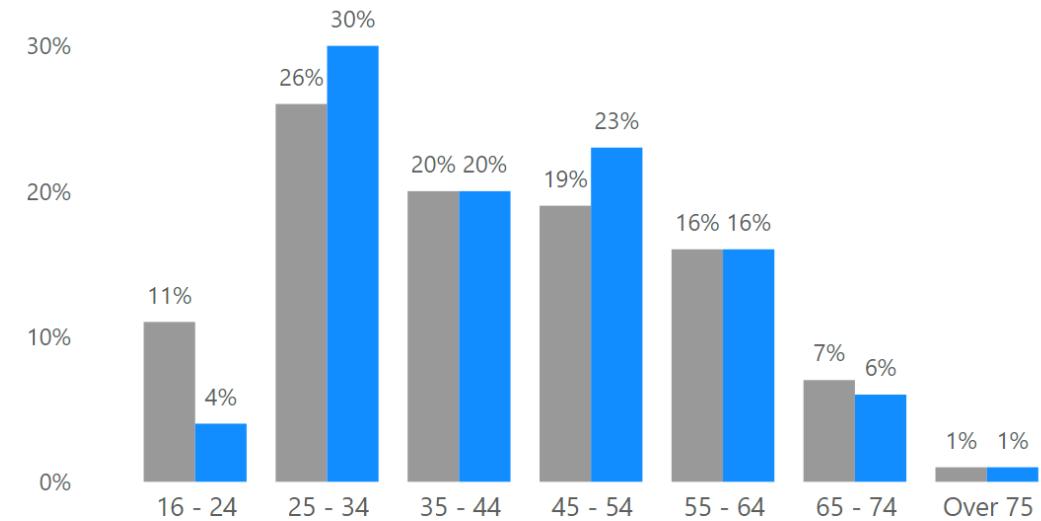


- For city visitors with overnights, “a must-see destination”, “stylish”, “lively” and “surprising” are brand features that are better rated than by overall visitors.
- Brand perceptions by same-day city trip visitors overall tend to differ less from all inbound visitors, compared to overnight travellers.

Age

Visitors with overnight

● All Inbound ● City (main holiday type)

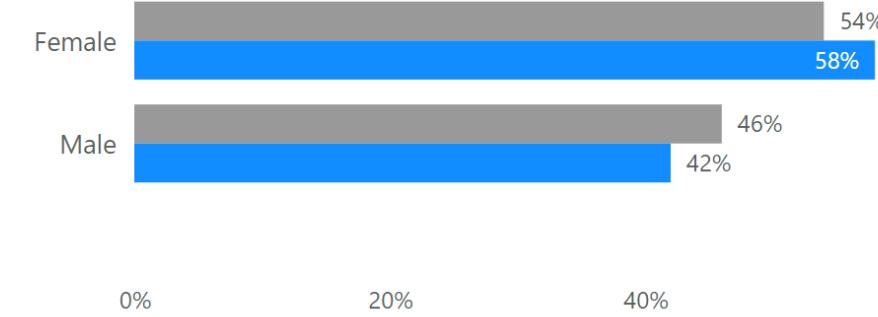


- City trip visitors are aged less often between 16 and 24 years but slightly more often between 25 and 34 as well as 45 and 54 years. More female visitors are doing city trips.

Gender

Visitors with overnight

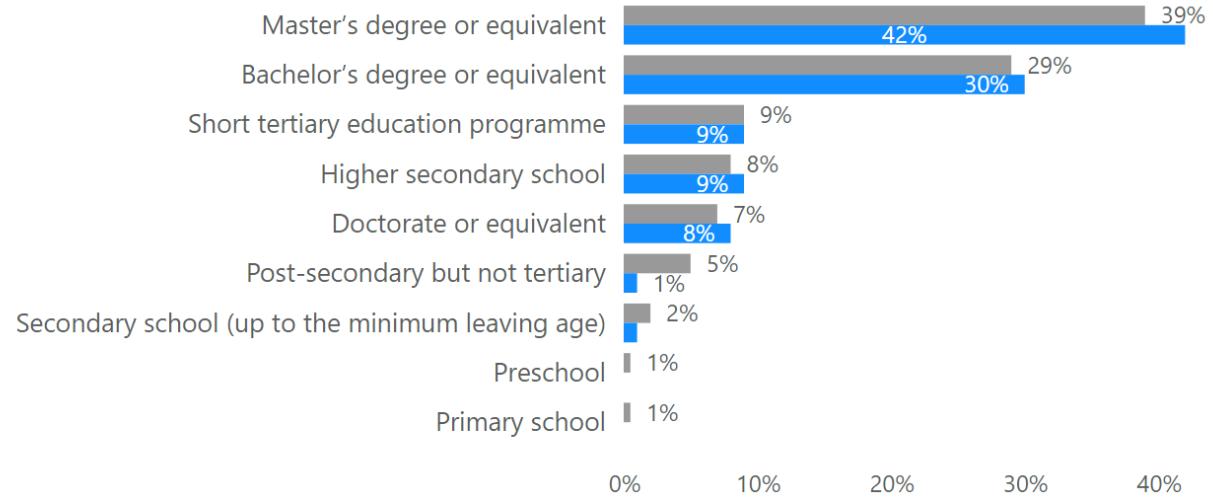
● All Inbound ● City (main holiday type)



Education

Visitors with overnight

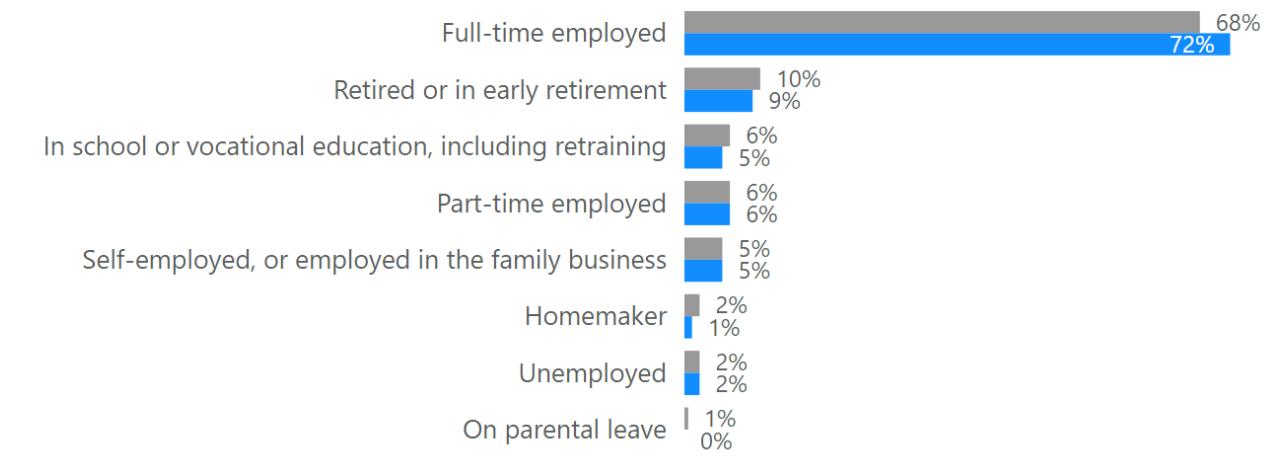
● All Inbound ● City (main holiday type)



Employment

Visitors with overnight

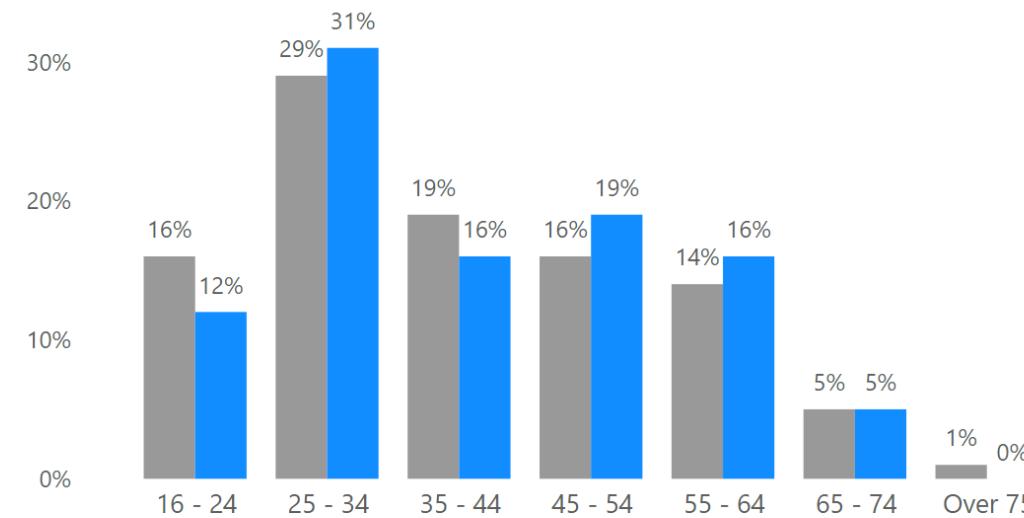
● All Inbound ● City (main holiday type)



Age

Same-day visitors

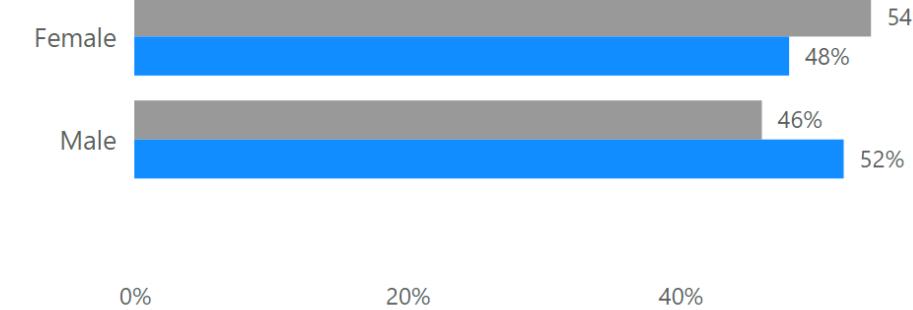
● All Inbound ● City (excursion type)



Gender

Same-day visitors

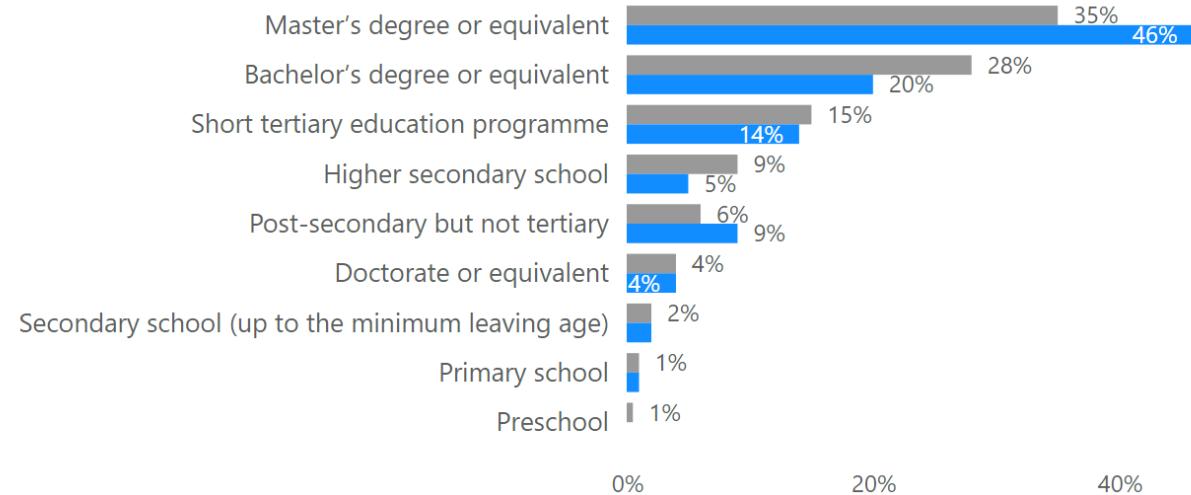
● All Inbound ● City (excursion type)



Education

Same-day visitors

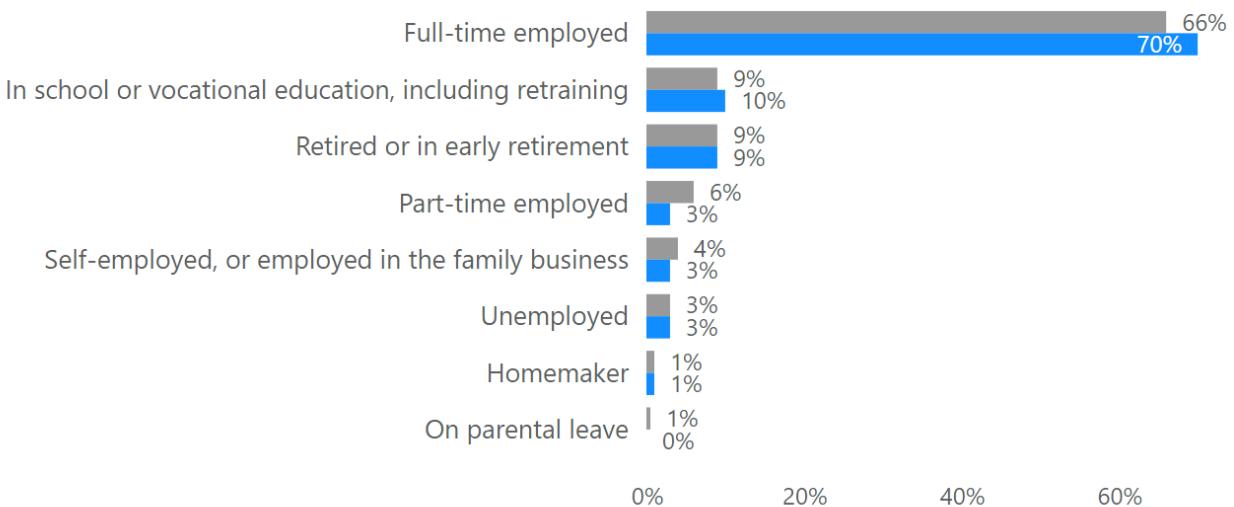
● All Inbound ● City (excursion type)



Employment

Same-day visitors

● All Inbound ● City (excursion type)





Destination Awareness & Growth Potential for City trips segment

General theme interest – City trips



	Rank (*)	Number of themes surveyed	% „very interested“ in theme	% „interested“ in theme	% „interested“, Ø all themes	„Interested“ in theme, pop., mn (**)	
Average Europe	5	33	-	68%	54%	-	
	7	33	39%	64%	52%	38,4	• Interest for city trips is comparatively highest in Spain, Poland and Ireland.
	6	33	36%	62%	53%	7,9	
	6	33	38%	66%	54%	4,4	• It is lowest among the French.
	6	33	42%	67%	53%	4,4	
	9	33	31%	62%	51%	5,1	
	15	33	30%	60%	55%	28,3	
	7	33	38%	67%	53%	32,4	
	7	38	48%	73%	57%	31,0	
	3	38	48%	74%	57%	25,7	
	2	21	39%	71%	47%	19,9	
	3	24	45%	70%	54%	2,5	
	5	24	35%	65%	51%	2,7	General interest in the respective themes when going on a holiday % of respondents agreeing.
	4	24	28%	64%	52%	4,6	(*) Rank among all surveyed themes in respective source markets. (**) Aged 18-75.
	9	24	37%	71%	60%	5,3	

Luxembourg's perceived theme competence - City trips



	Rank (*)	Number of themes surveyed	% „Luxembourg very suitable“	% „Lux. very suitable“, Ø all themes	„Luxembourg very suitable“, pop., mn (**)
Average Europe	1	26	37%	24%	-
	1	26	42%	23%	25,2
	9	26	29%	26%	3,7
	1	26	40%	22%	2,7
	2	26	41%	23%	2,7
	7	26	29%	25%	2,4
	1	26	35%	22%	16,2
	2	26	38%	22%	18,3
	2	31	37%	23%	16,0
	1	31	42%	26%	14,5
	1	10	42%	27%	11,8
	1	20	48%	27%	1,7
	1	20	37%	24%	1,6
	2	20	31%	21%	2,2
	8	20	38%	33%	2,9

- Luxembourg's perceived theme competence for city trips is rated high across most source markets, with perception only weaker in Netherlands, Belgium and Portugal.

Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

(*) Rank among all surveyed themes in respective source markets.

(**) Aged 18-75.

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

City trips



(Ø 9 European source markets) - LFT target segments

	„Interested in theme“, Rank	Number of themes surveyed	„Luxembourg very suitable“, Rank	Number of themes surveyed
EXP	4	26	1	26
NLA	10	26	3	26
RS	5	26	2	26
SB	5	26	1	26
PS	6	26	1	26
LO	6	26	1	26

- In line with trends seen at the source market level, theme interest for city trips ranks comparatively lower than Luxembourg's theme competence for city trips across LFT target segments
- Explorers are more interested in city trips than other segments.



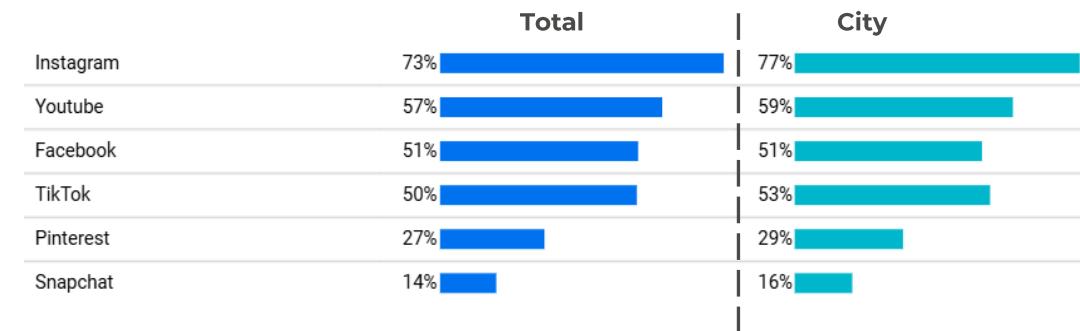
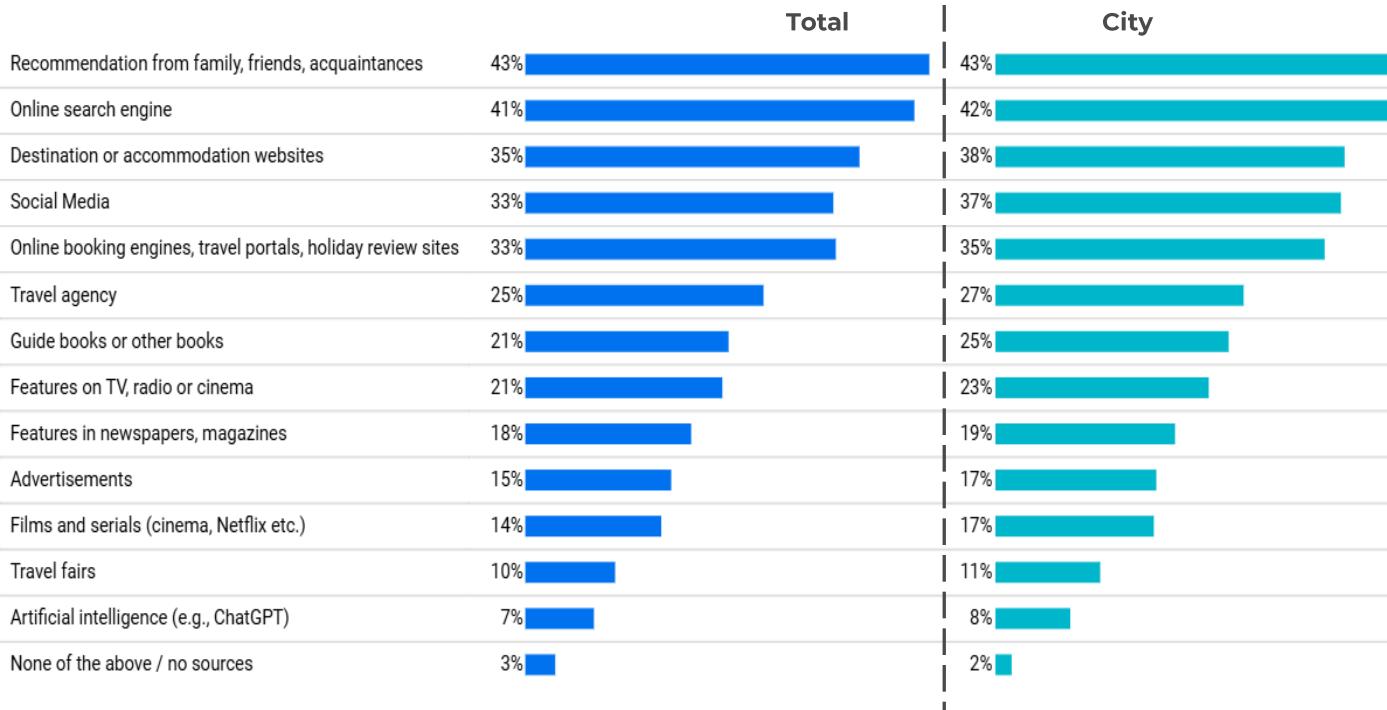
Trip organisation and preferences of City trips segment



Trip organisation and preferences (1)

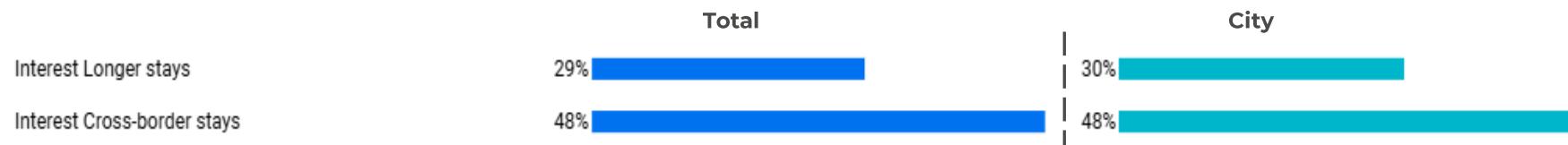
— Average European source markets, total vs. travellers interested in city trips

Preferred sources of travel inspiration



- City travellers take equal or slightly more travel inspiration from all listed sources than all travellers do.
- Interest for longer stays as well as cross-border stays in Luxembourg does not differ from all travellers.

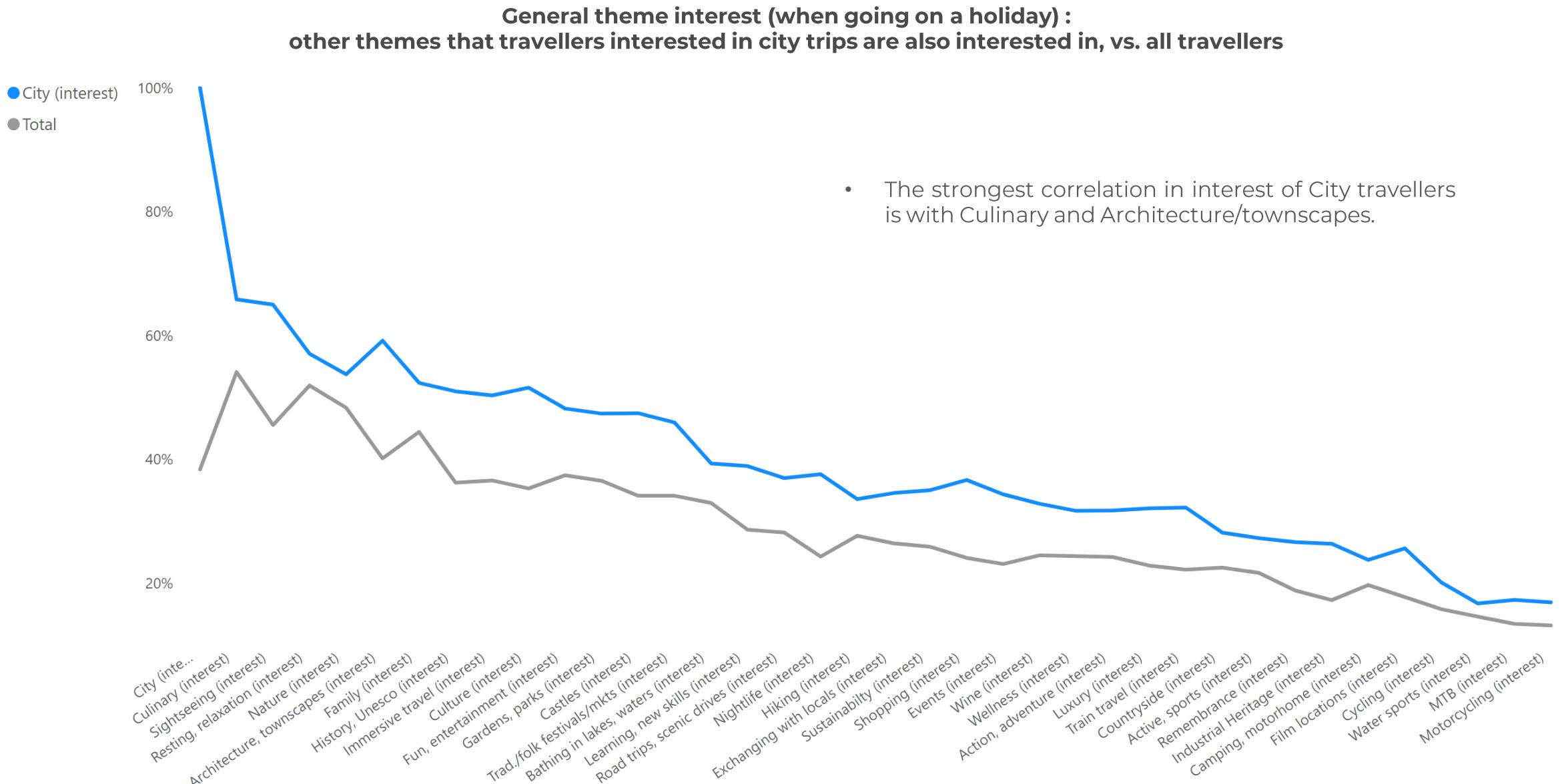
Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent)





Trip organisation and preferences (2)

— Average European source markets, total vs. travellers interested in city trips

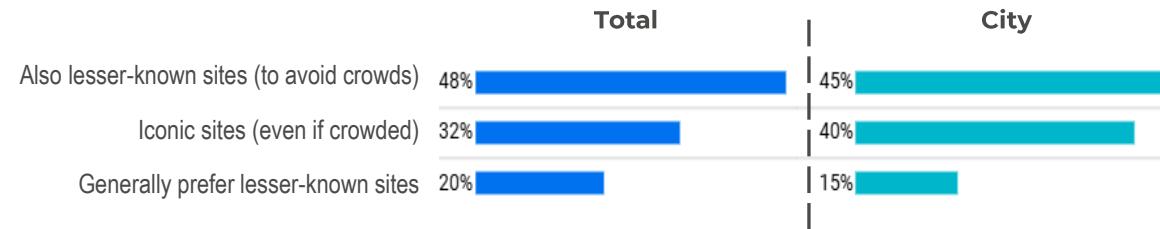




Trip organisation and preferences (3)

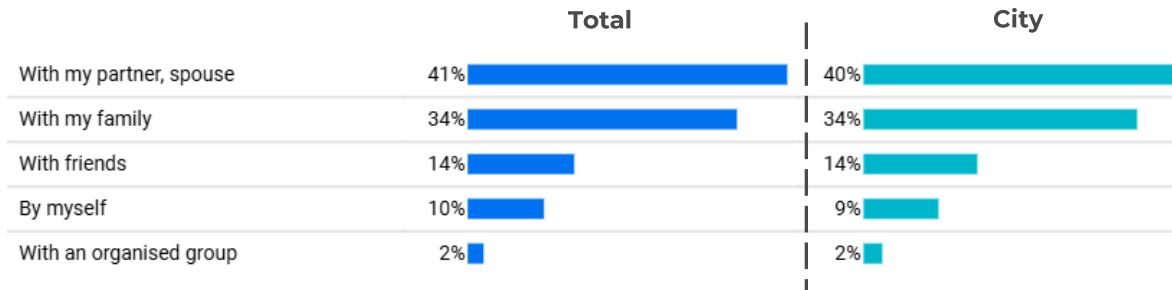
— Average European source markets, total vs. travellers interested in city trips

General preference for visiting iconic vs. lesser-known sites

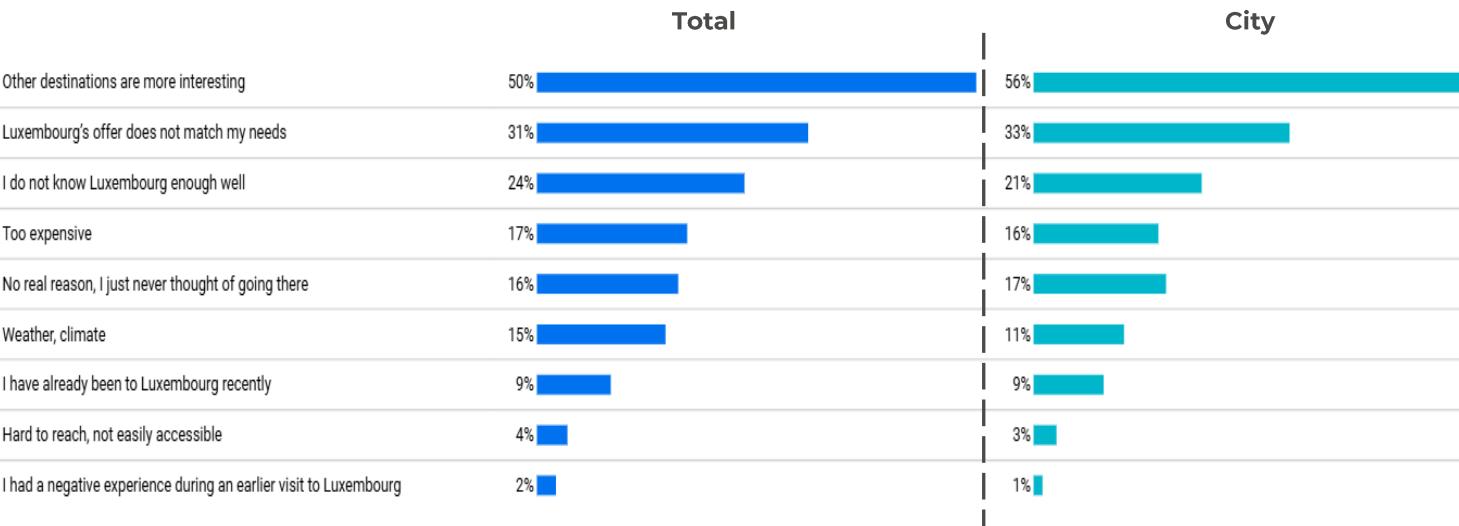


- City trip visitors show a higher preference for iconic, even if crowded, sites as well as less preferring lesser-known sites compared to the overall visitors.

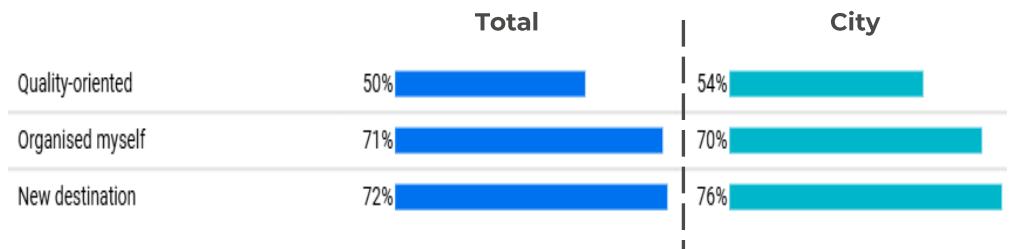
Travel party (*)



Reasons for not considering Luxembourg as a destination



Quality orientation, self-organisation (*), new destination (**)



- A higher share of city travellers indicate not considering Luxembourg as a destination because other destinations appear more interesting to them.
- Additionally, they are slightly more often quality-oriented and had travelled slightly more often to a destination never visited before.

(*) During last outbound holiday trip .

(**) During last outbound holiday trip: had travelled to a destination never visited before.

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



Your contact

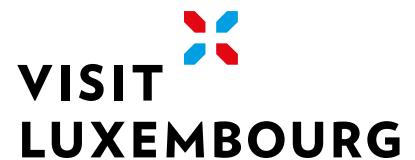


Alain Krier

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