

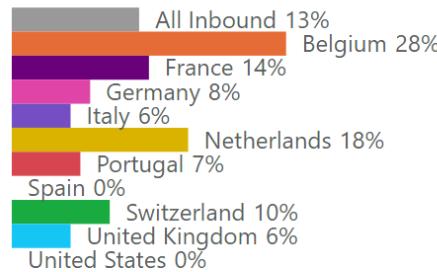


Luxembourg for Tourism  
**Theme profile**  
**HIKING 2024**

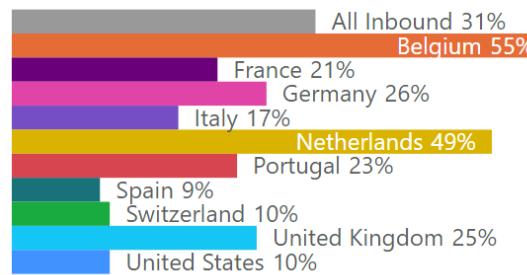


# Market size of Hiking segment

Main - Walking/hiking holiday

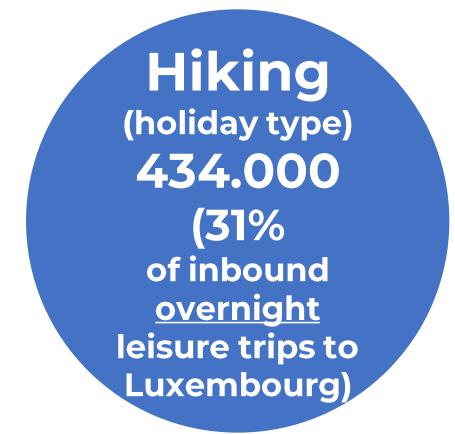
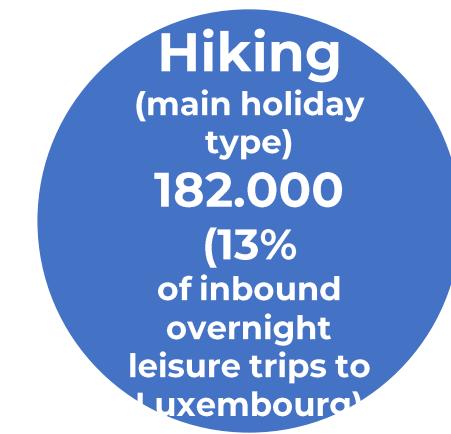


Walking/hiking holiday



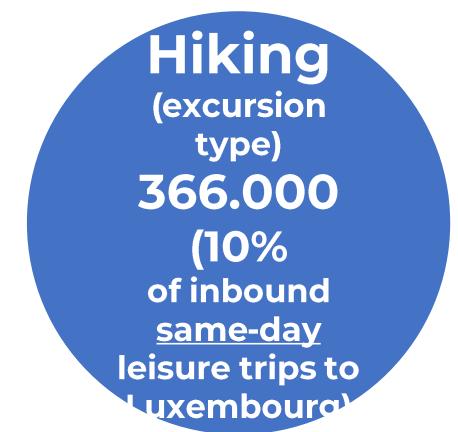
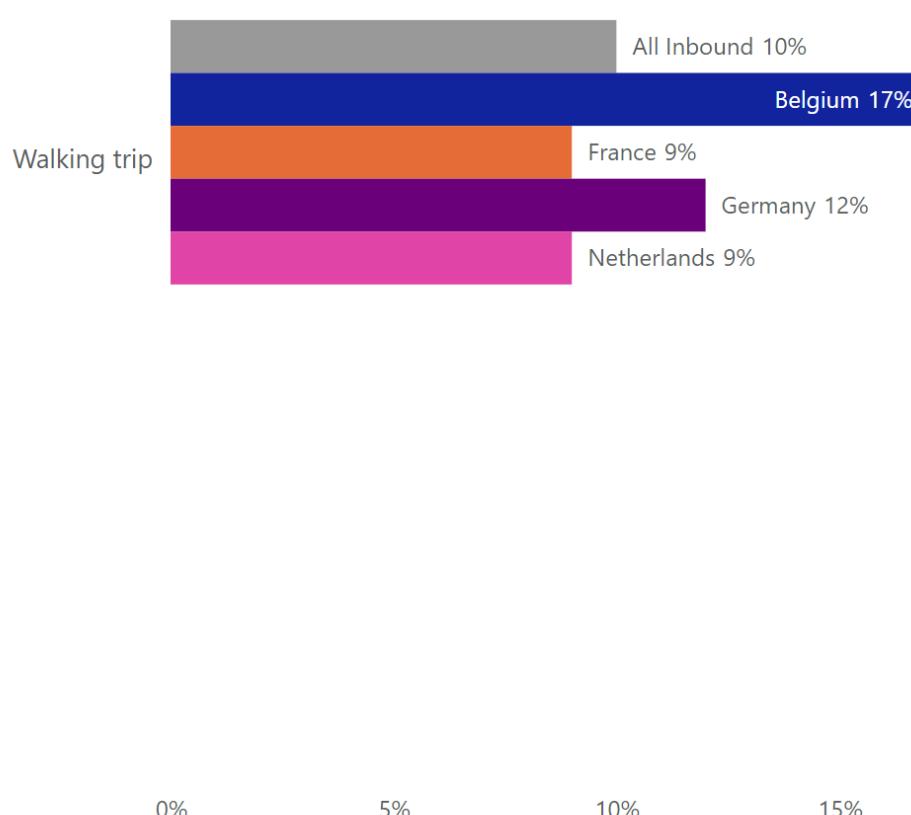
0% 20% 40% 60%

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



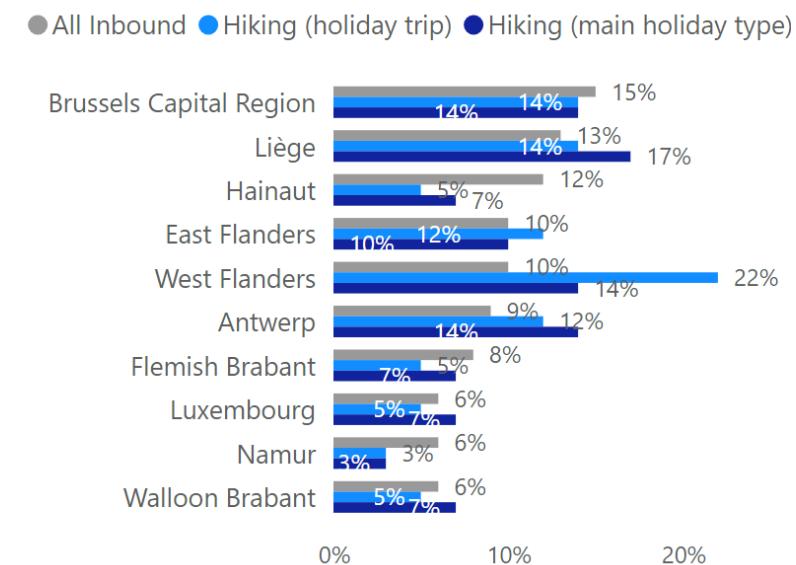
- Belgium as well as the Netherlands show the highest share of walking/hiking related holidays.

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



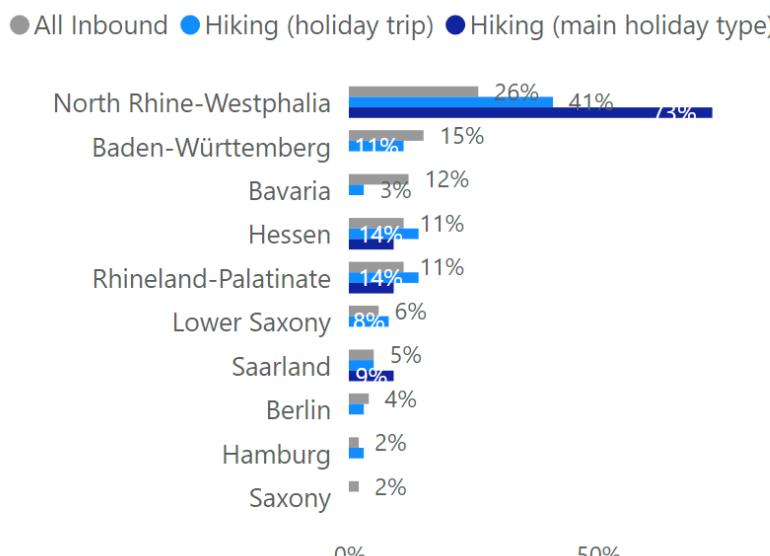
## Region of origin (BE)

### Visitors with overnight



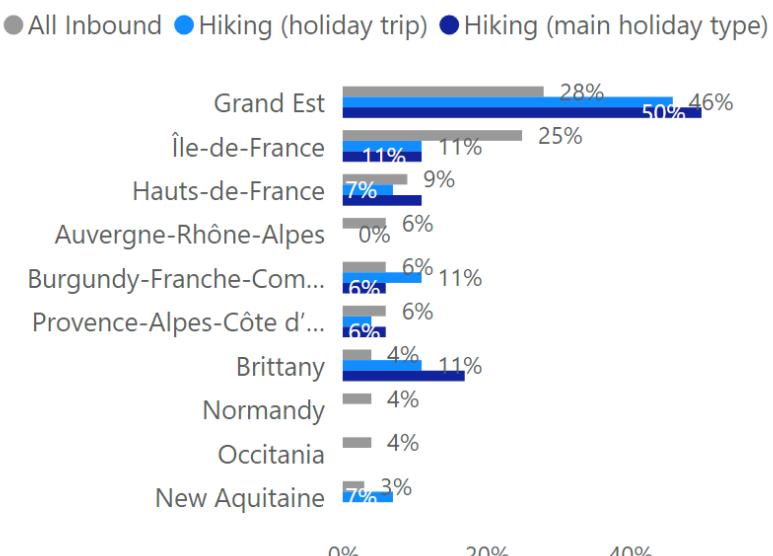
## Region of origin (DE)

### Visitors with overnight



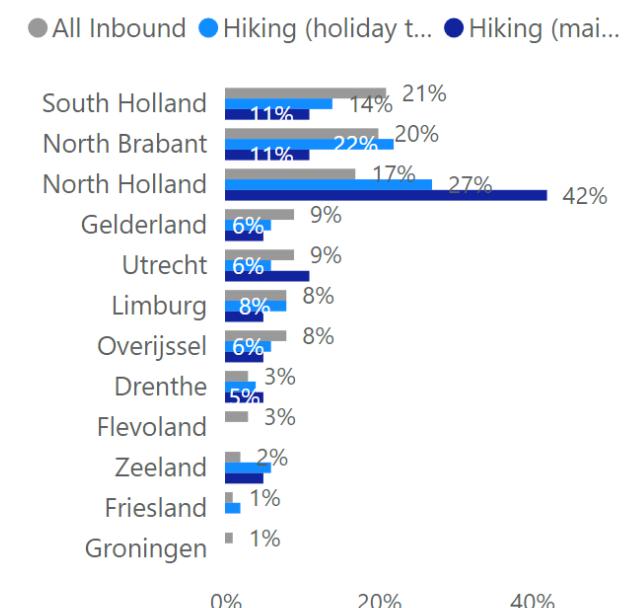
## Region of origin (FR)

### Visitors with overnight



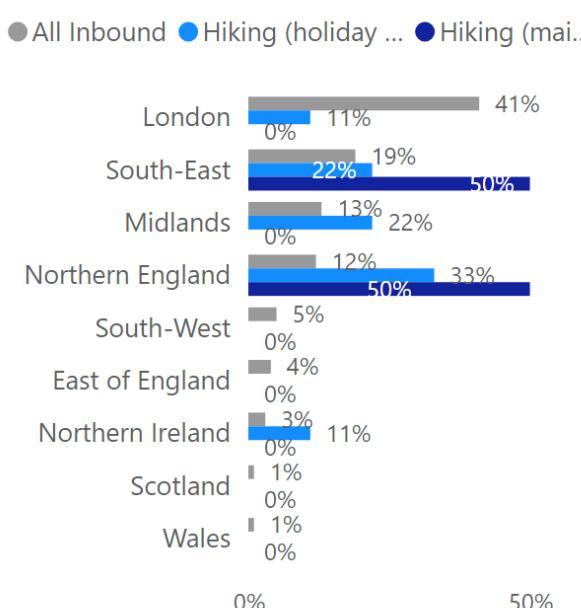
## Region of origin (NL)

### Visitors with overnight



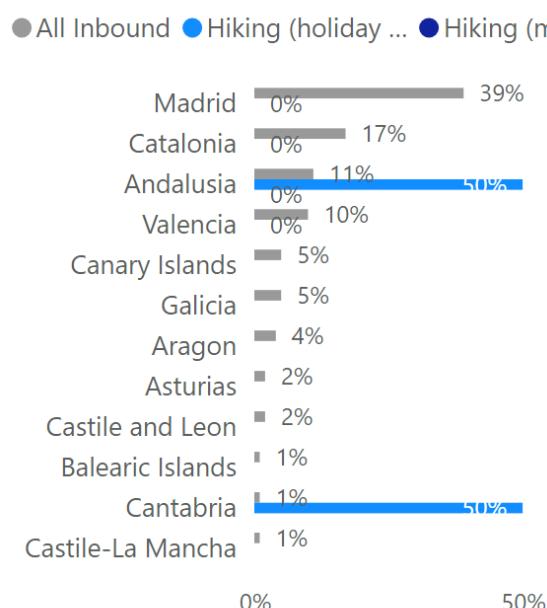
## Region of origin (UK)

### Visitors with overnight



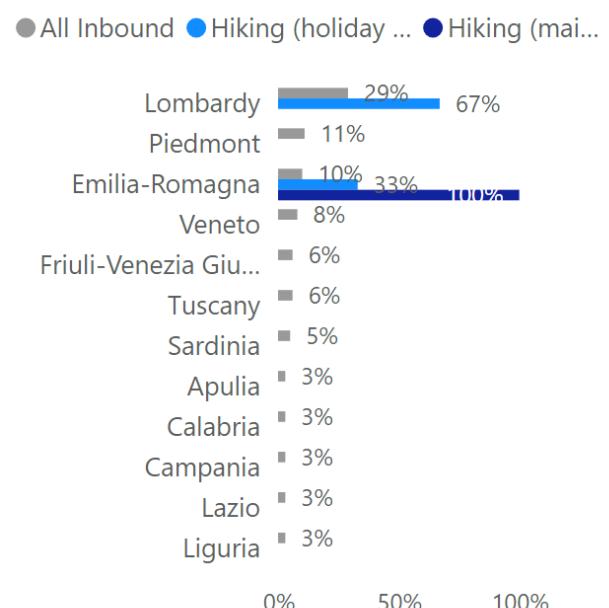
## Region of origin (ES)

### Visitors with overnight



## Region of origin (IT)

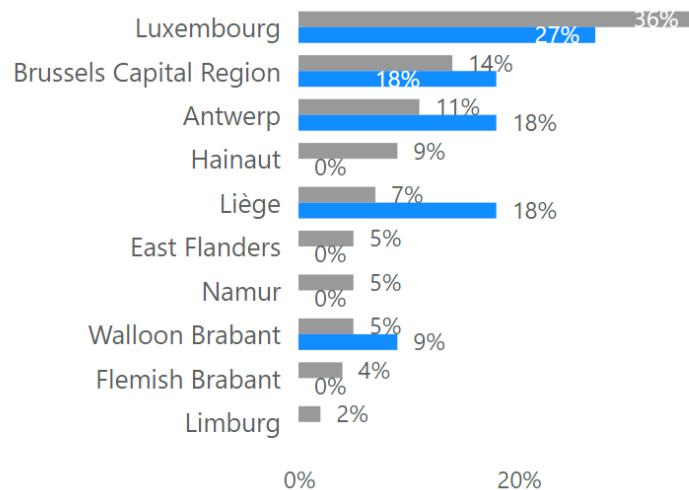
### Visitors with overnight



## Region of origin (BE)

### Same-day visitors

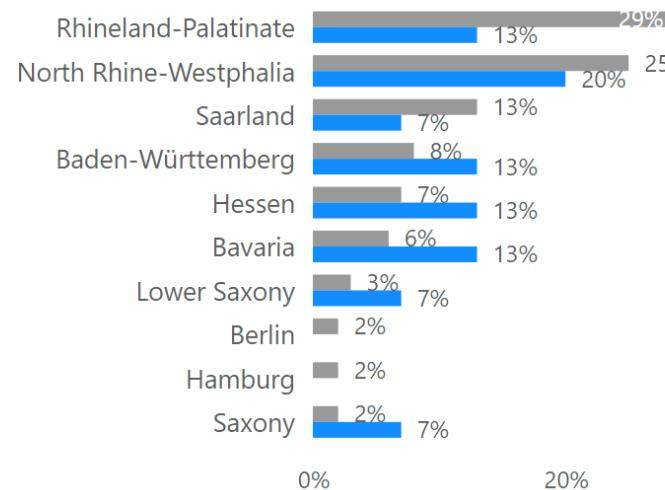
● All Inbound ● Hiking (excursion type)



## Region of origin (DE)

### Same-day visitors

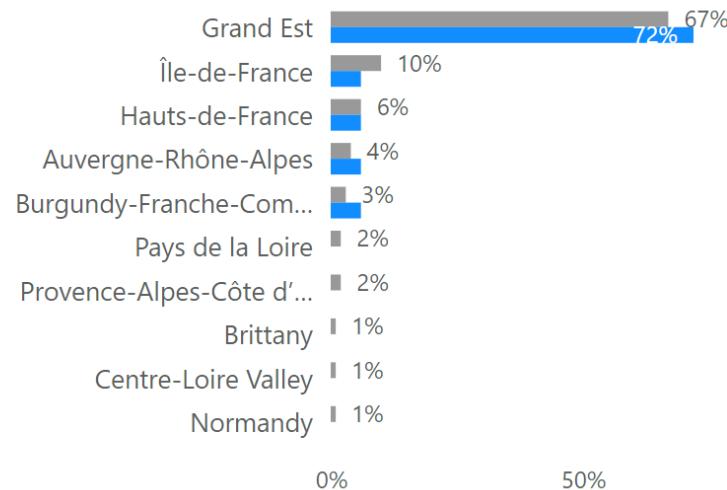
● All Inbound ● Hiking (excursion type)



## Region of origin (FR)

### Same-day visitors

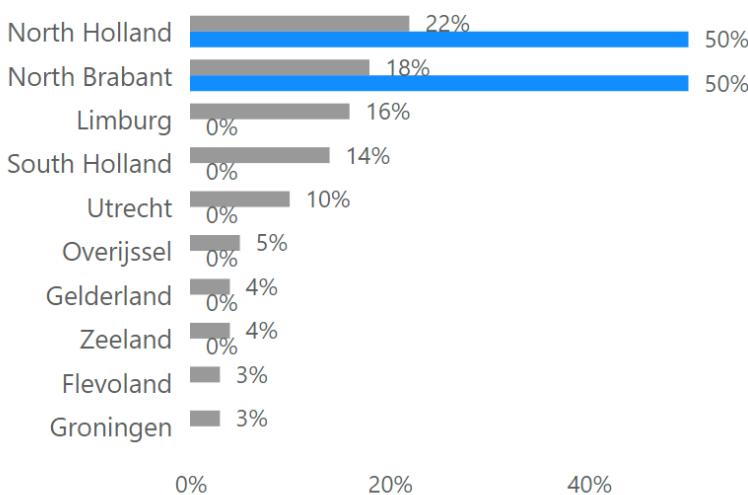
● All Inbound ● Hiking (excursion type)



## Region of origin (NL)

### Same-day visitors

● All Inbound ● Hiking (excursion type)



- There are large regional differences in source markets for visitors with overnight in regard to hiking-related holidays (see previous slide): e.g., high shares for North Rhine-Westphalia in DE, and for Grand-Est in FR.

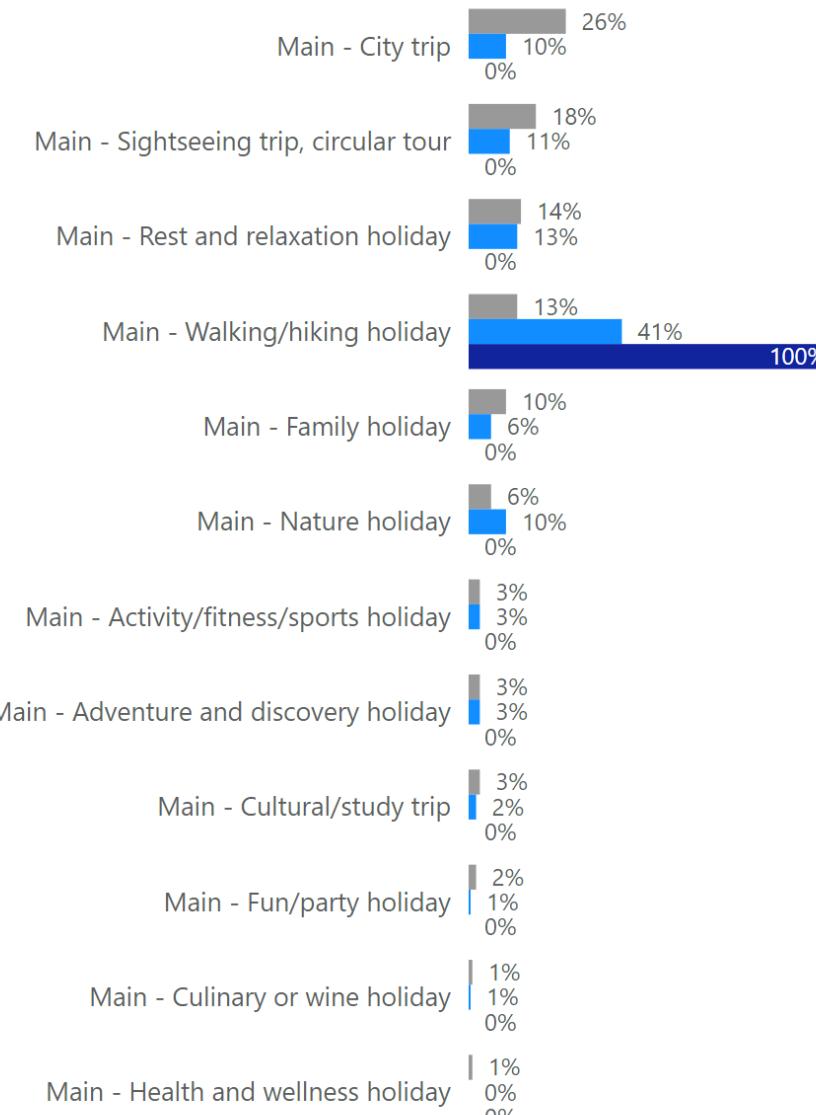


# **Travel behaviour of leisure visitors with Hiking as a holiday type / excursion in Luxembourg**

## Main holiday types

### Visitors with overnight

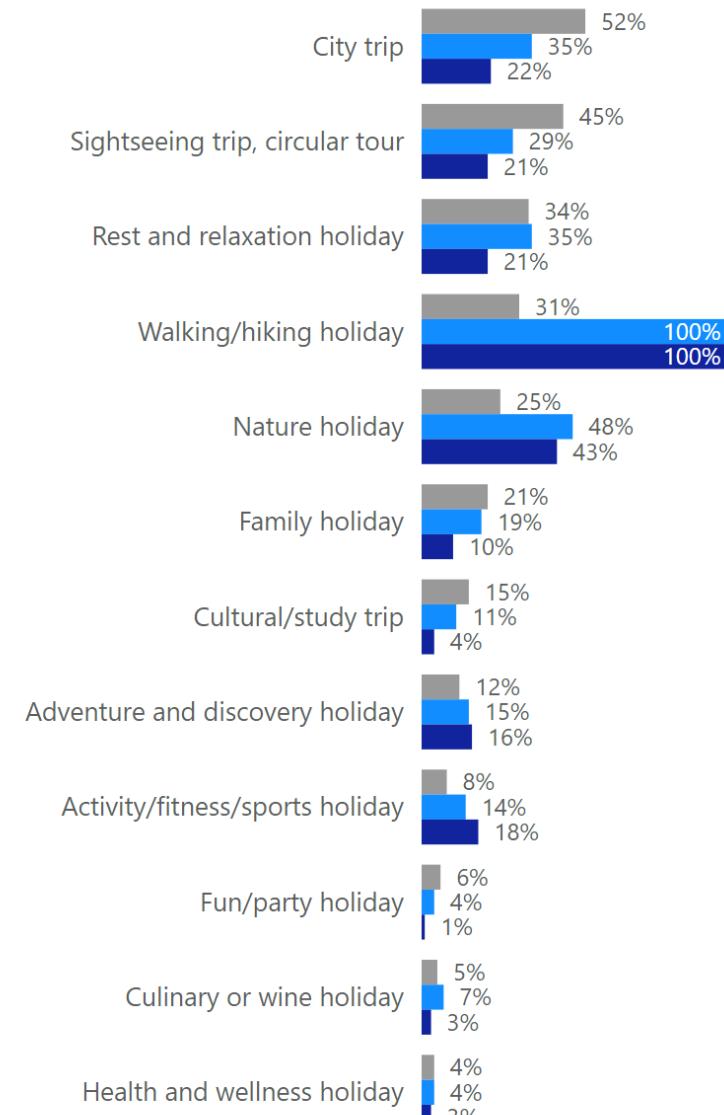
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## All holiday types

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

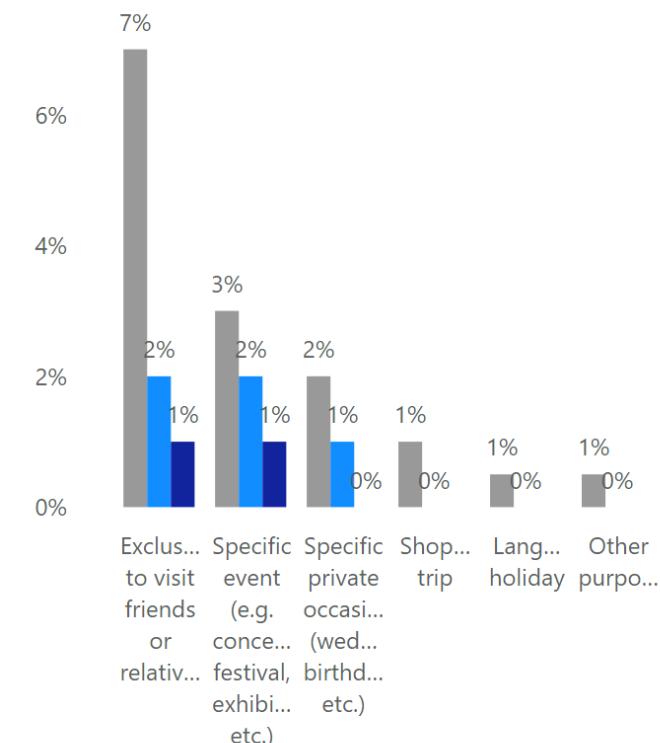


- Hiking is often combined with nature holidays and less often associated with city and sightseeing trips.

## Main purpose of overnight trip

### (if not holiday)

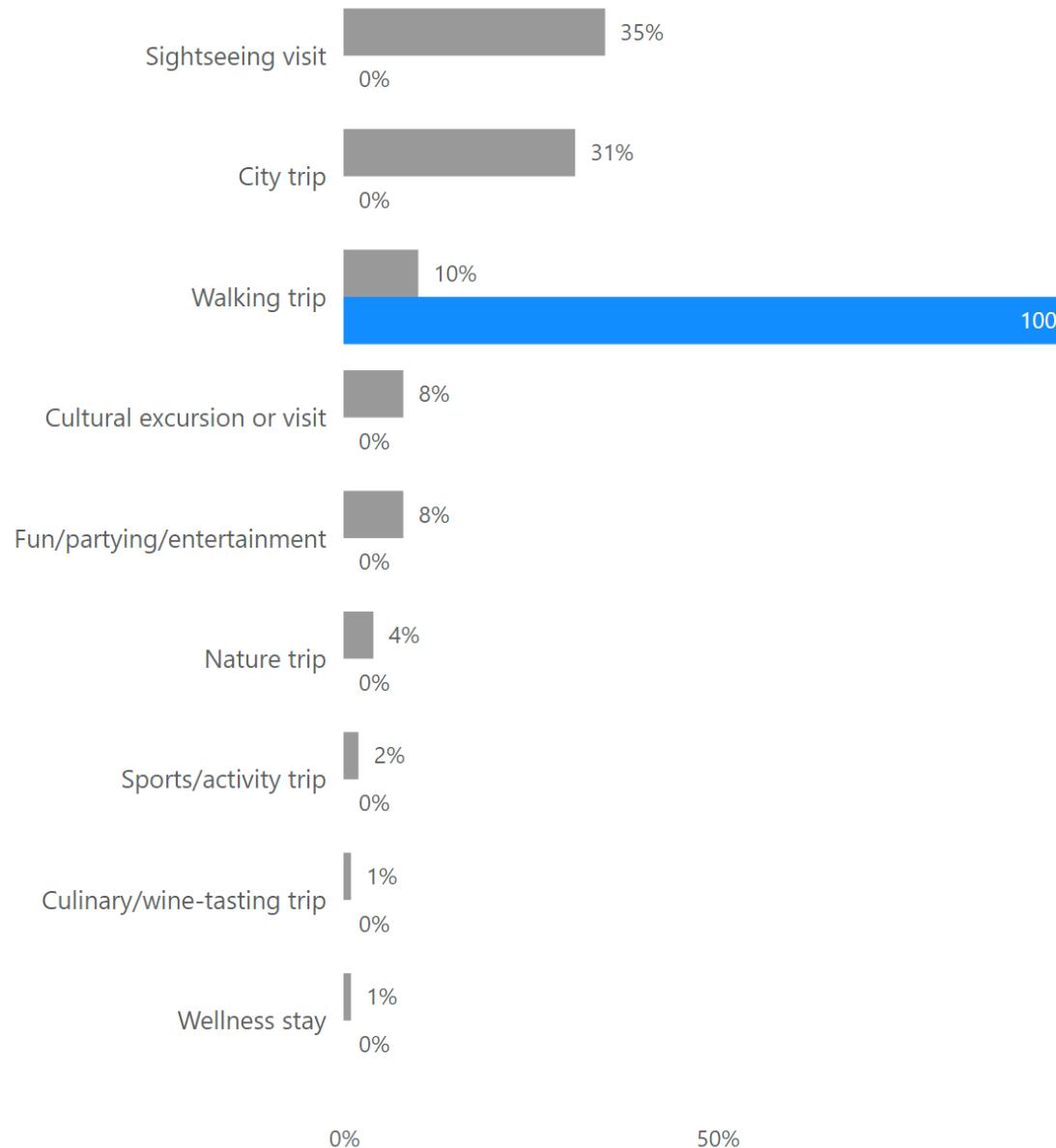
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



# Type of excursion

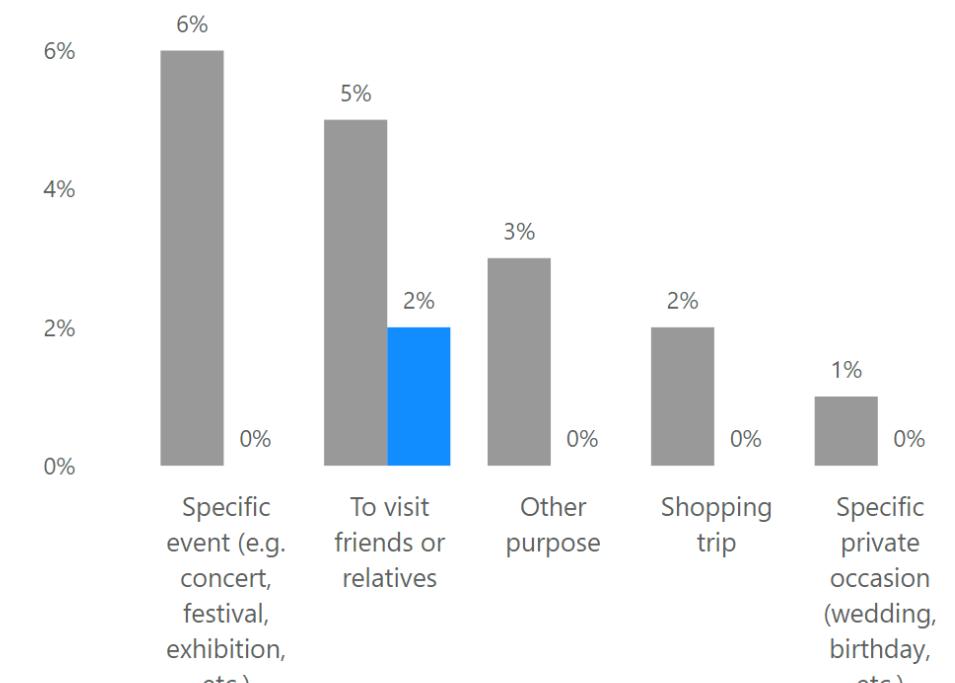
## Same-day visitors

● All Inbound ● Hiking (excursion type)



## Main purpose of excursion (if not day trip)

● All Inbound ● Hiking (excursion type)



# Reasons for choosing Luxembourg

## Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

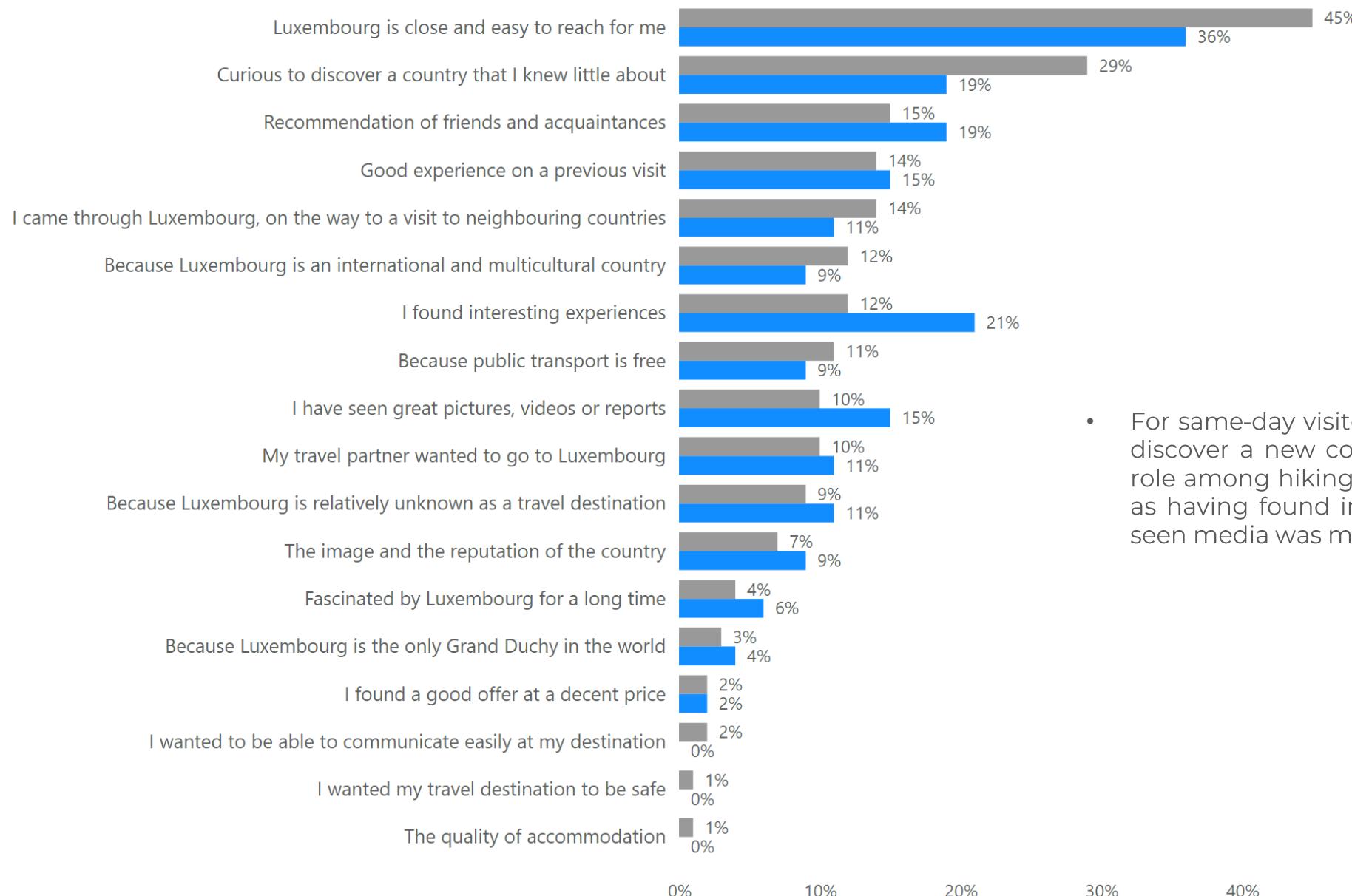


- The destination's proximity, combined with previous positive experiences—either personally encountered or shared through recommendations and media, are key reasons to visit Luxembourg for hiking visitors.
- Curiosity as well as Luxembourg being relatively unknown as travel destination are less frequently a reason for hiking travelers.

# Reasons for choosing Luxembourg

## Same-day visitors

● All Inbound ● Hiking (excursion type)

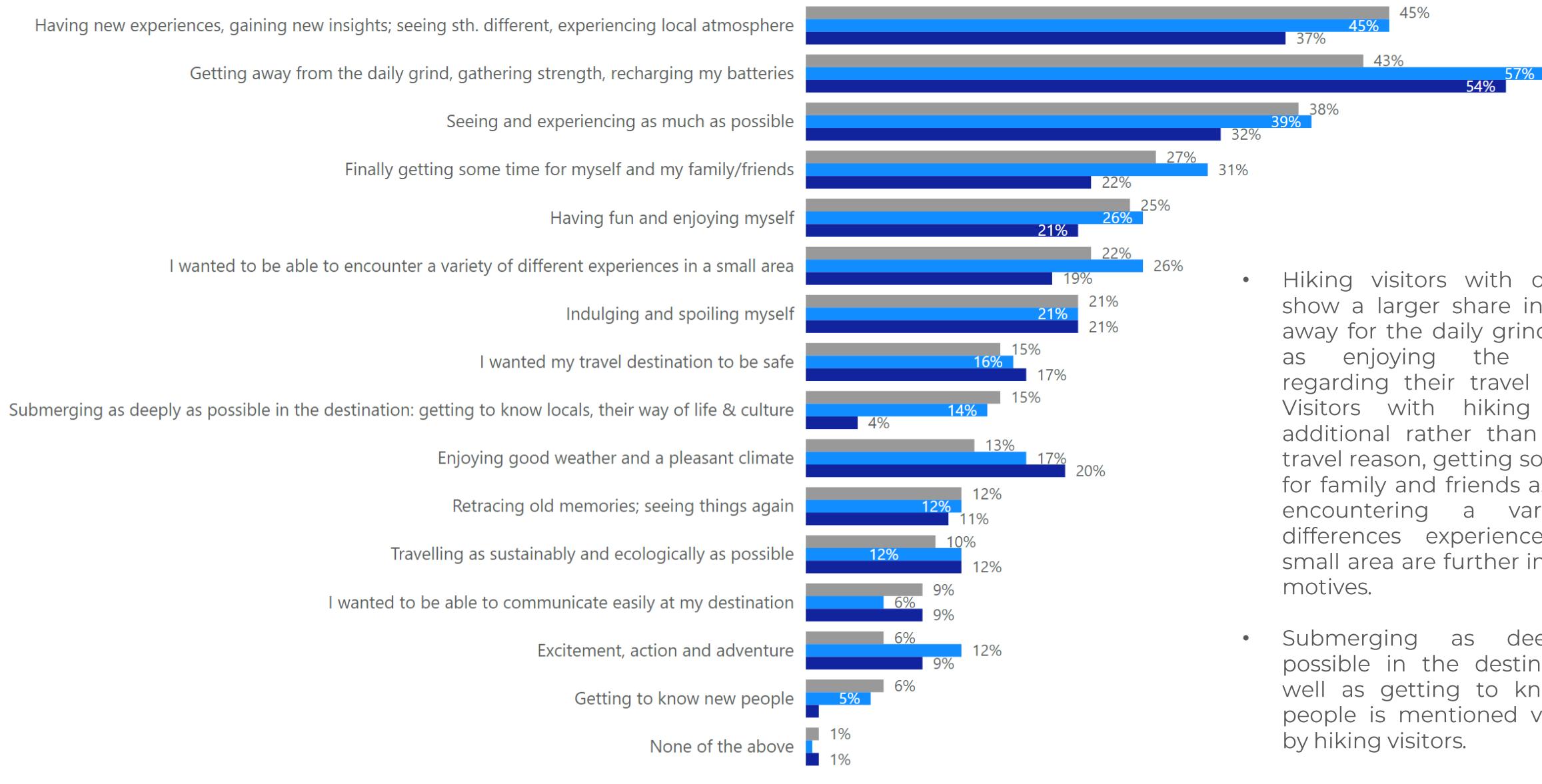


- For same-day visitors proximity as well as curiosity to discover a new country seems to play less of a key-role among hiking visitors. Recommendation as well as having found interesting experiences and having seen media was mentioned more often.

# Travel motives

## Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

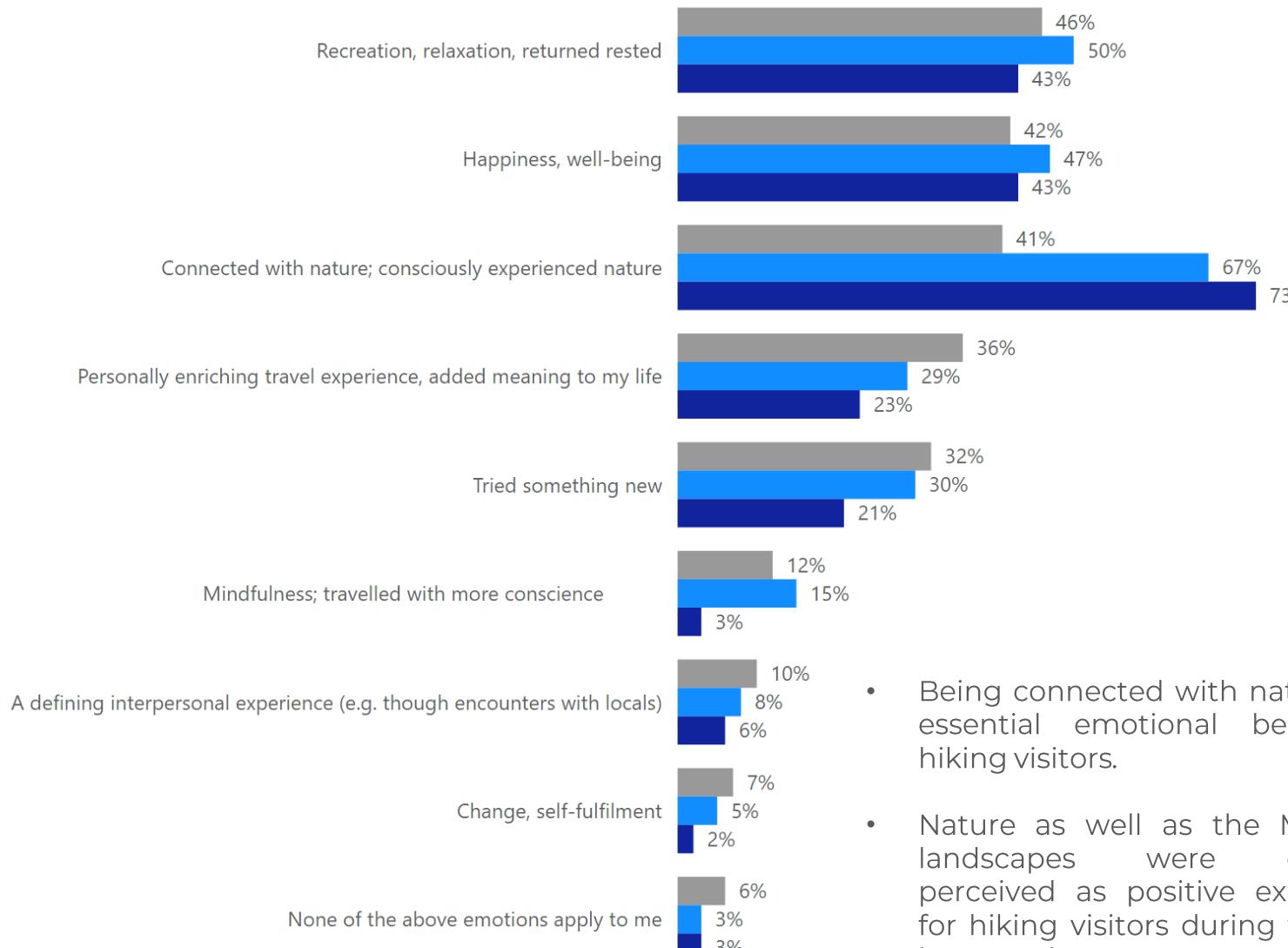


- Hiking visitors with overnight show a larger share in getting away for the daily grind as well as enjoying the weather regarding their travel motives. Visitors with hiking as an additional rather than a main travel reason, getting some time for family and friends as well as encountering a variety of differences experiences in a small area are further important motives.
- Submerging as deeply as possible in the destination as well as getting to know new people is mentioned very little by hiking visitors.

## Emotional benefits experienced during stay

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

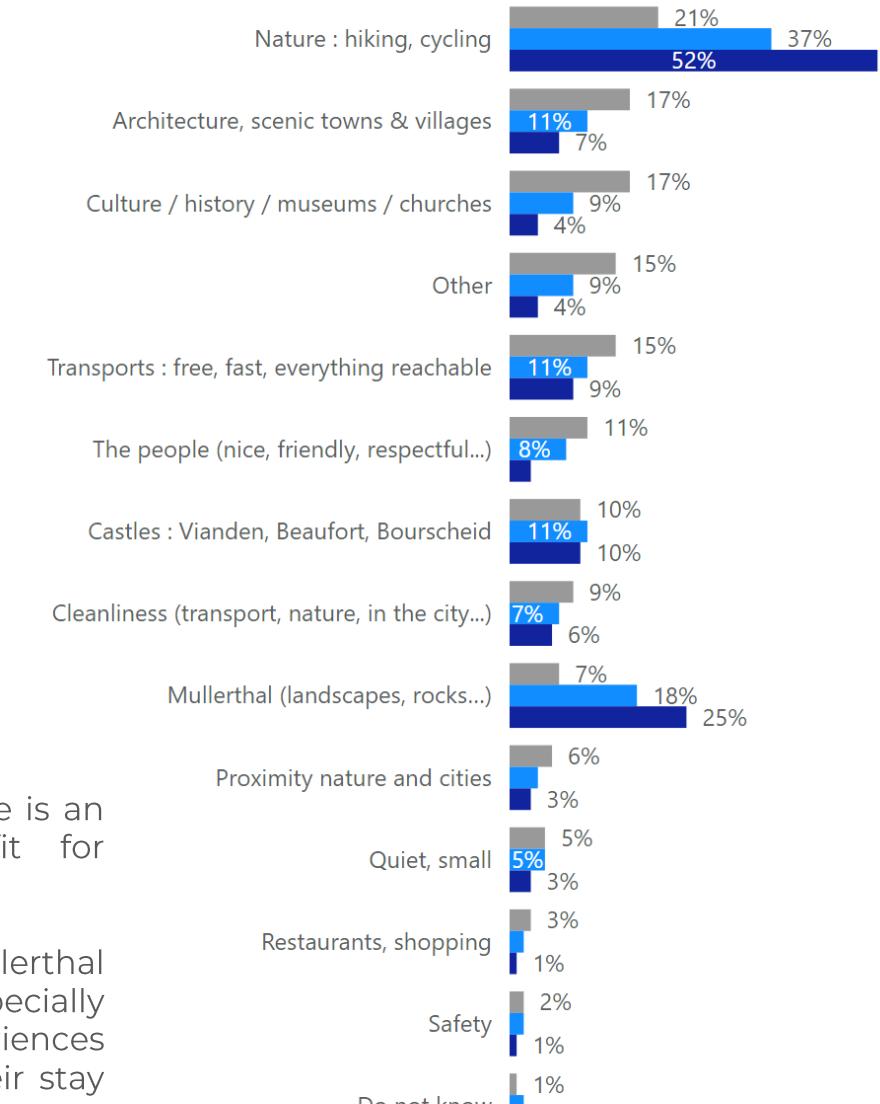


- Being connected with nature is an essential emotional benefit for hiking visitors.
- Nature as well as the Müllerthal landscapes were especially perceived as positive experiences for hiking visitors during their stay in Luxembourg.

## Particularly positive experience during stay (open question)

### Visitors with overnight

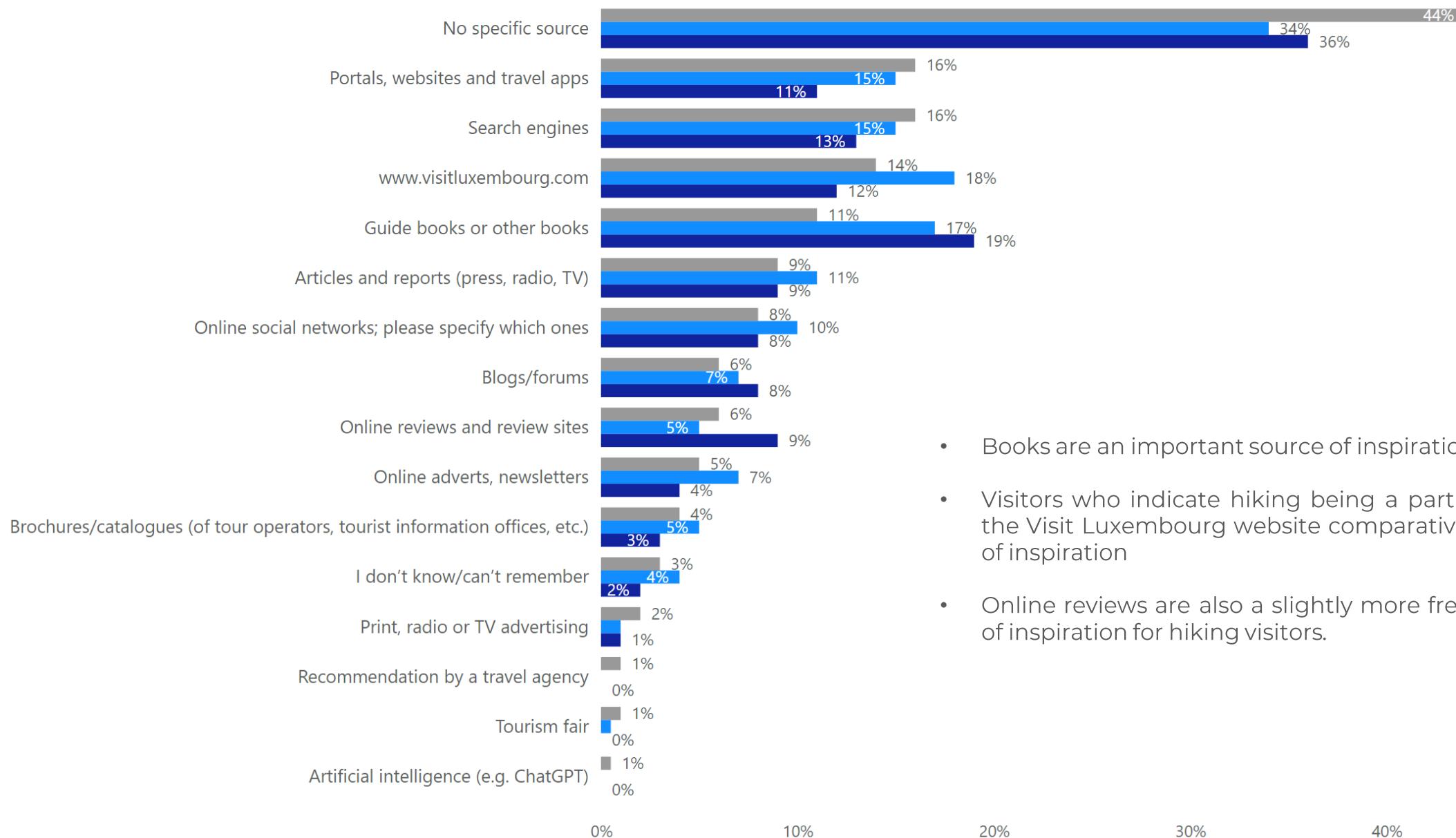
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Inspiration sources

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

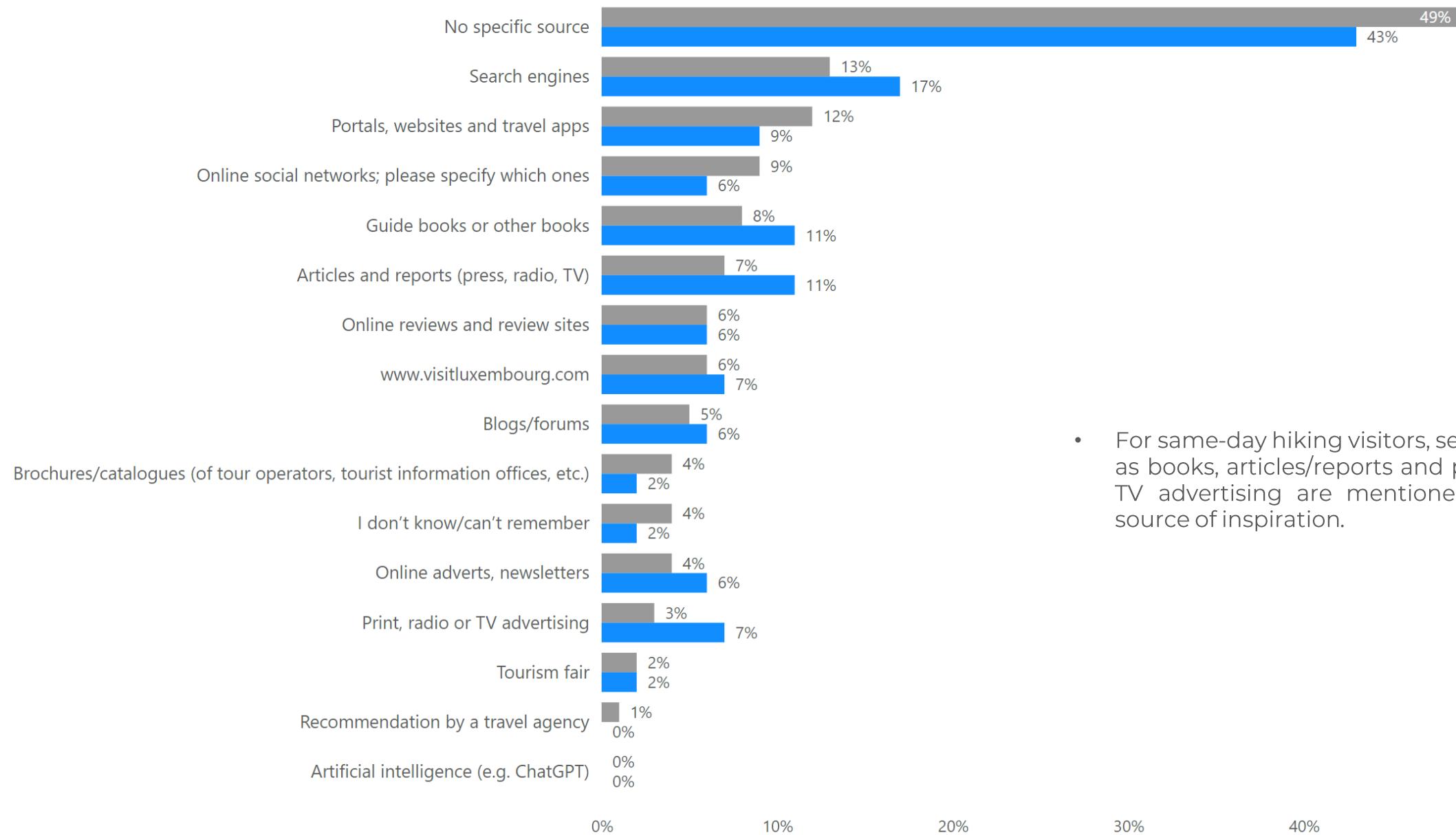


- Books are an important source of inspiration for hiking visitors.
- Visitors who indicate hiking being a part of their holiday use the Visit Luxembourg website comparatively more as a source of inspiration
- Online reviews are also a slightly more frequently used source of inspiration for hiking visitors.

## Inspiration sources

### Same-day visitors

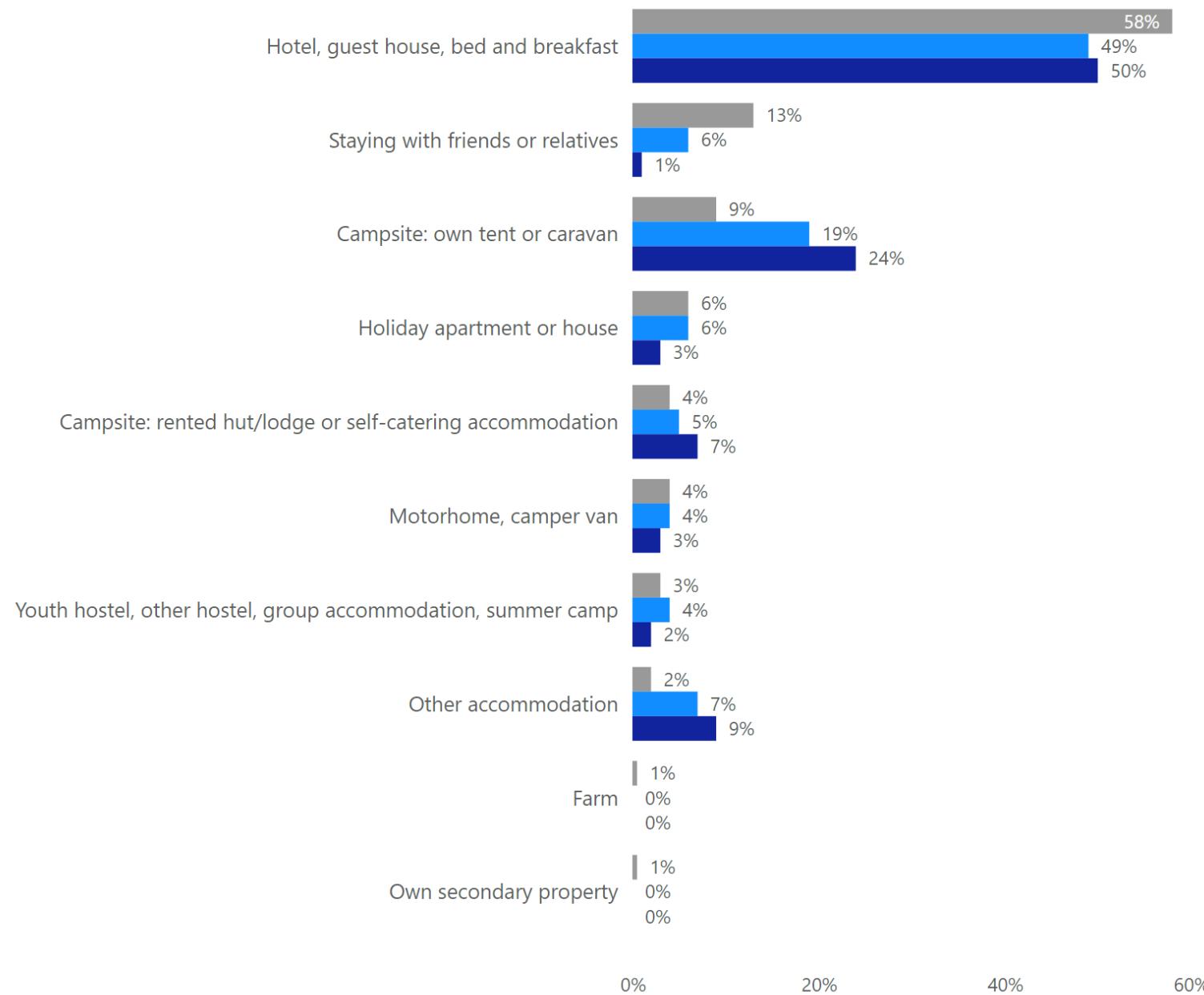
● All Inbound ● Hiking (excursion type)



- For same-day hiking visitors, search engines as well as books, articles/reports and print media, radio or TV advertising are mentioned more often as a source of inspiration.

## Type of accommodation

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

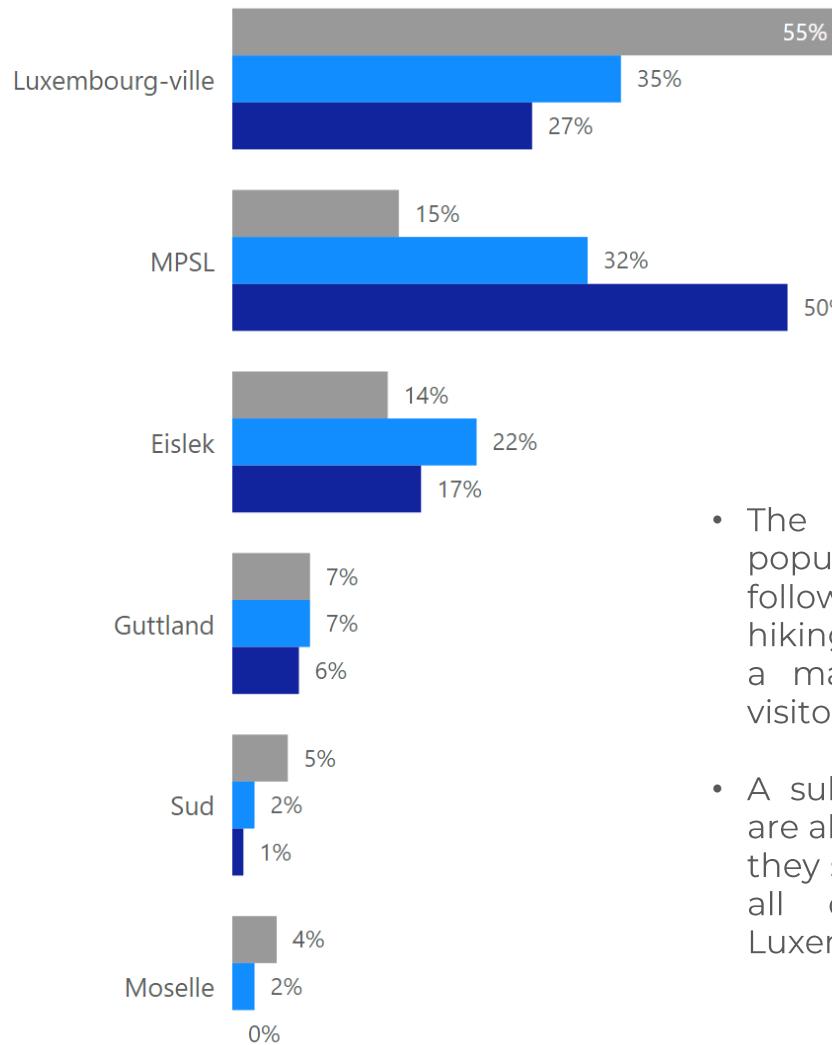


- Hiking visitors tend to stay less in hotels and more often on campsites during their visits.

## Destination region

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

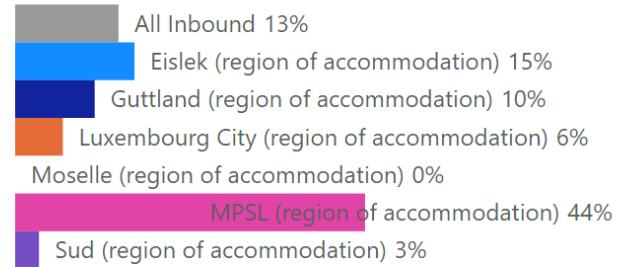


- The Müllerthal region is the most popular destination for hiking visitors, followed by Eislek. Compared to MPSL, hiking is more often an additional than a main holiday type among Eislek visitors.
- A substantial share of hiking visitors are also staying in the capital city – but they still make up only a minor part of all overnight visitors staying in Luxembourg City.

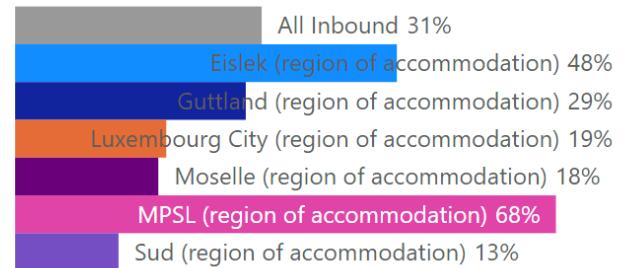
## Shares by destination region

### Visitors with overnight

Main - Walking/hiking holiday



Walking/hiking holiday



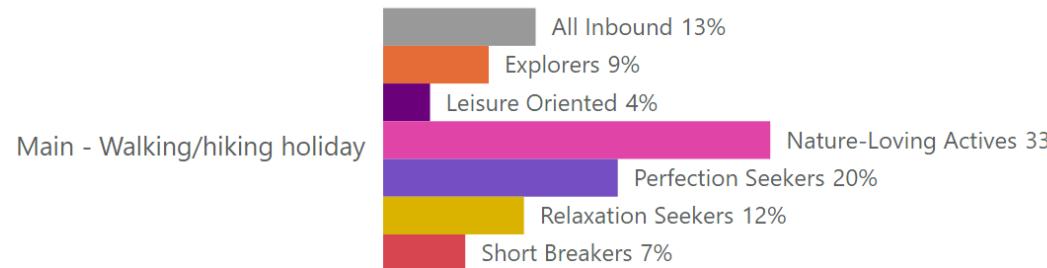
0% 20% 40% 60%

0% 20% 40% 60%

Source: LFT/Iires Visitor Survey, 2023-2024.

## Shares by target segments

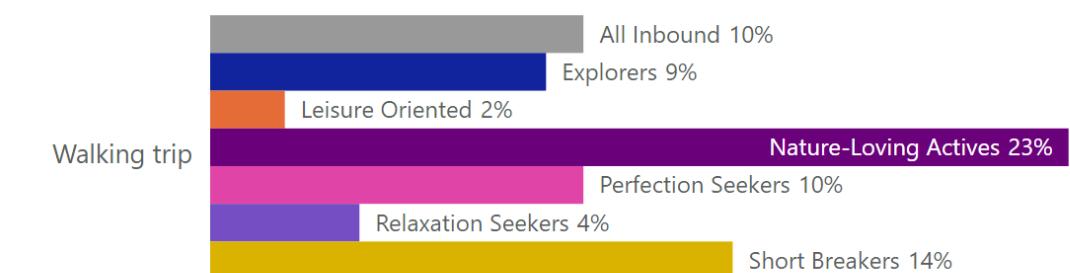
### Visitors with overnight



## Shares by target segments

### Same-day visitors

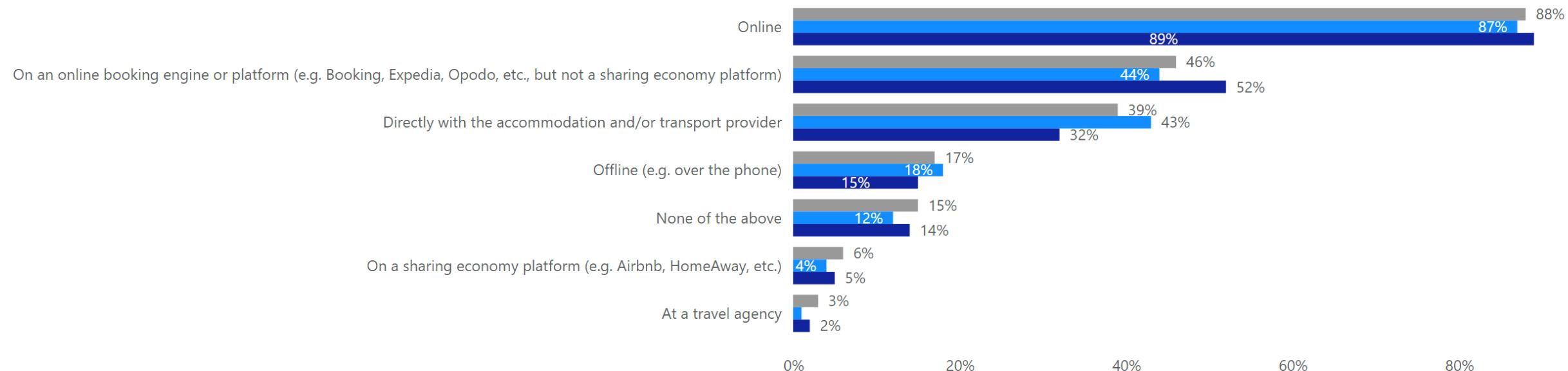
- Without surprise, Nature-Loving Actives are dominant among hiking visitors, both for visitors with overnight as well as same-day visitors.



## Booking channels

### Visitors with overnight

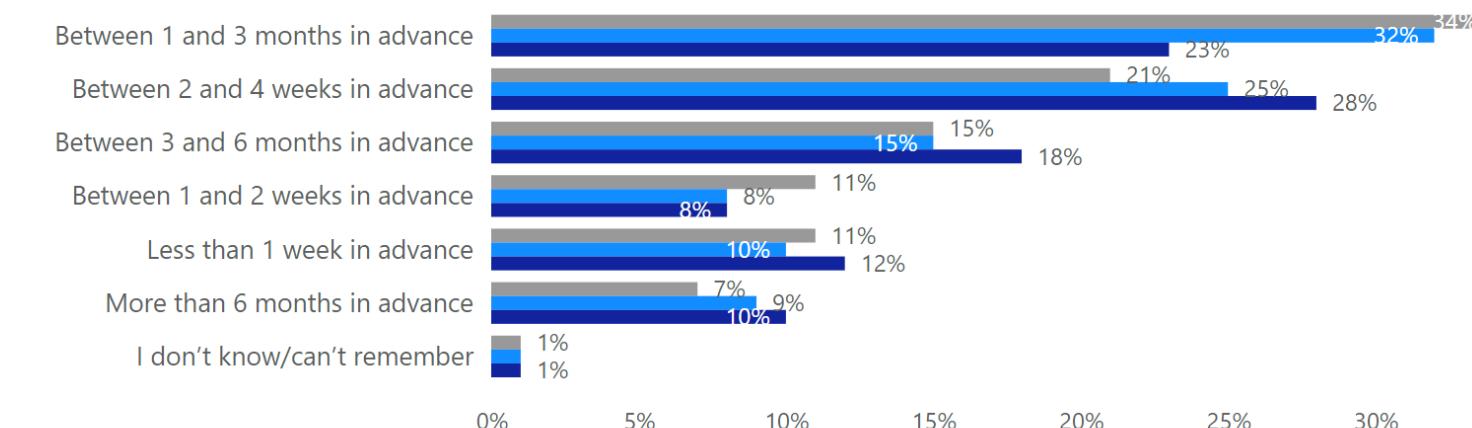
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Decision moment

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

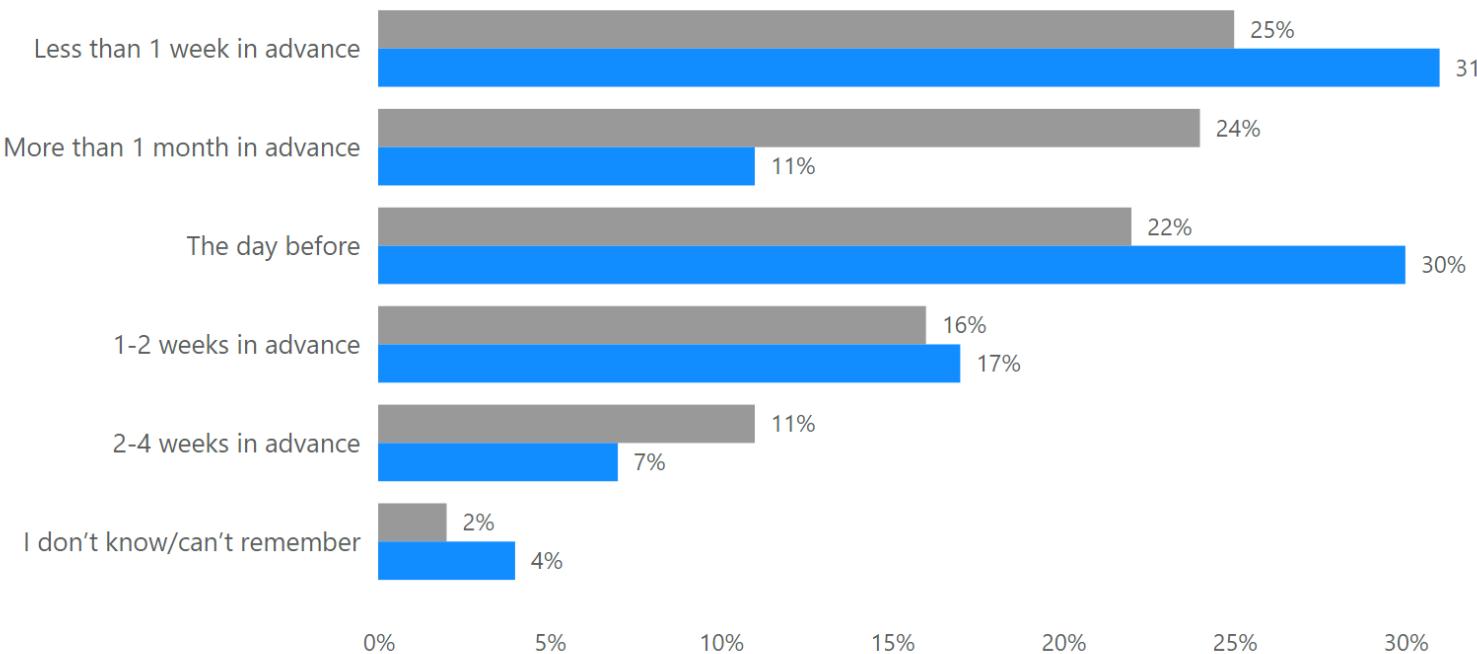


- Hiking visitors use online booking engines slightly more often than overall visitors. Online booking is the most used booking channel.
- Visitors indicating hiking as their main holiday type tend to decide more commonly between 2 and 4 weeks prior to their vacation. Deciding between 1 and 3 months in advance is especially less often mentioned.

## Decision moment

### Same-day visitors

● All Inbound ● Hiking (excursion type)

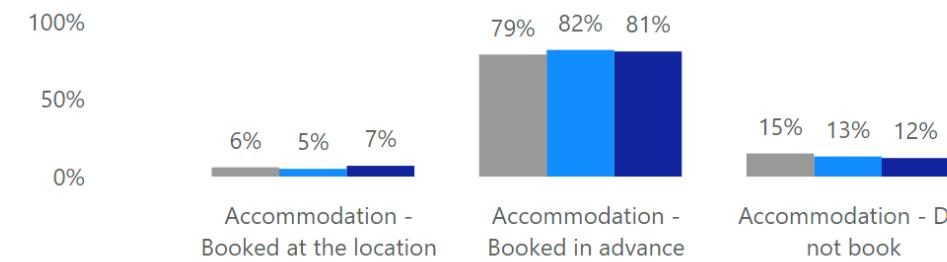


- Among same-day visitors, hiking visitors typically make their travel decisions within a shorter timeframe prior to their trip: less than 1 week in advance or the day before are the most mentioned decision moments.

## Booking of travel items

### Accommodation

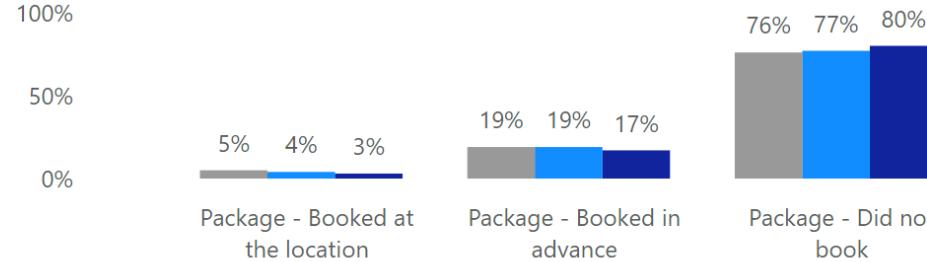
Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Booking of travel items

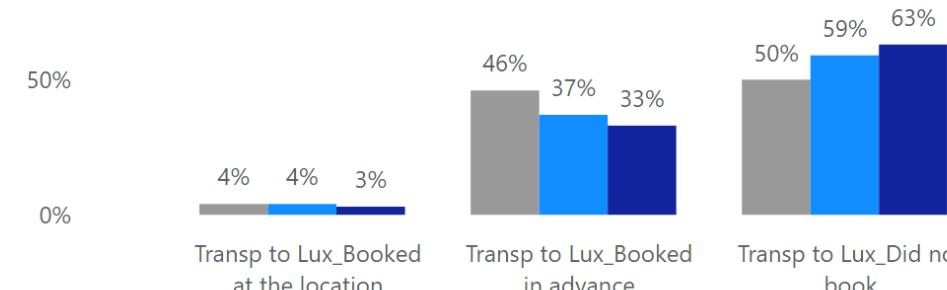
### Package

Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



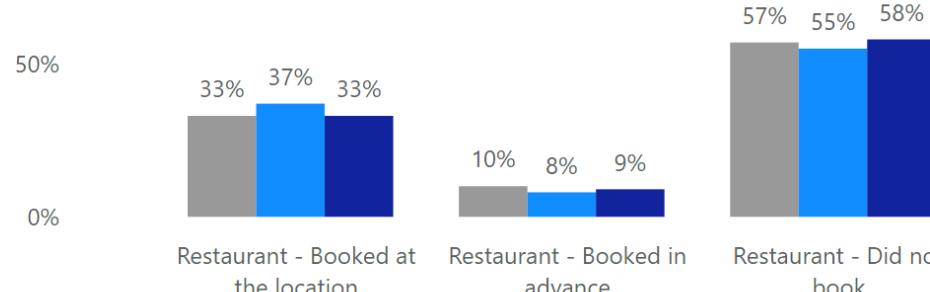
### Transport to Luxembourg

Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



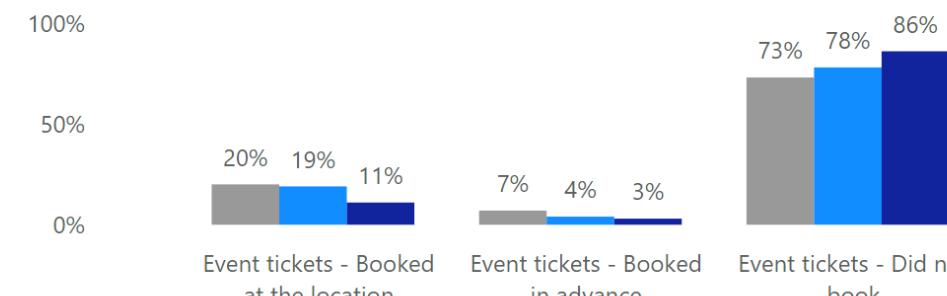
### Restaurant

Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



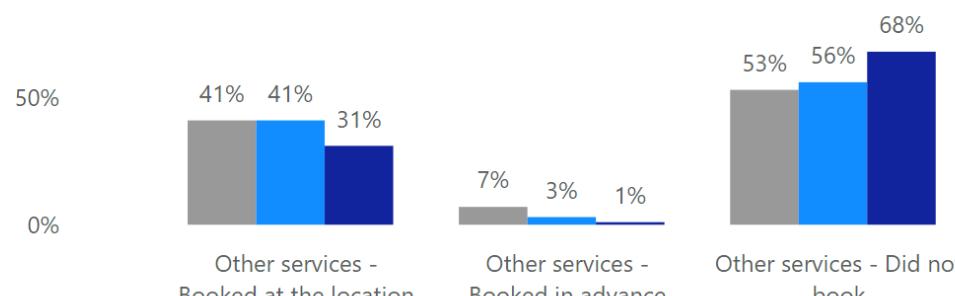
### Event tickets

Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



### Other services

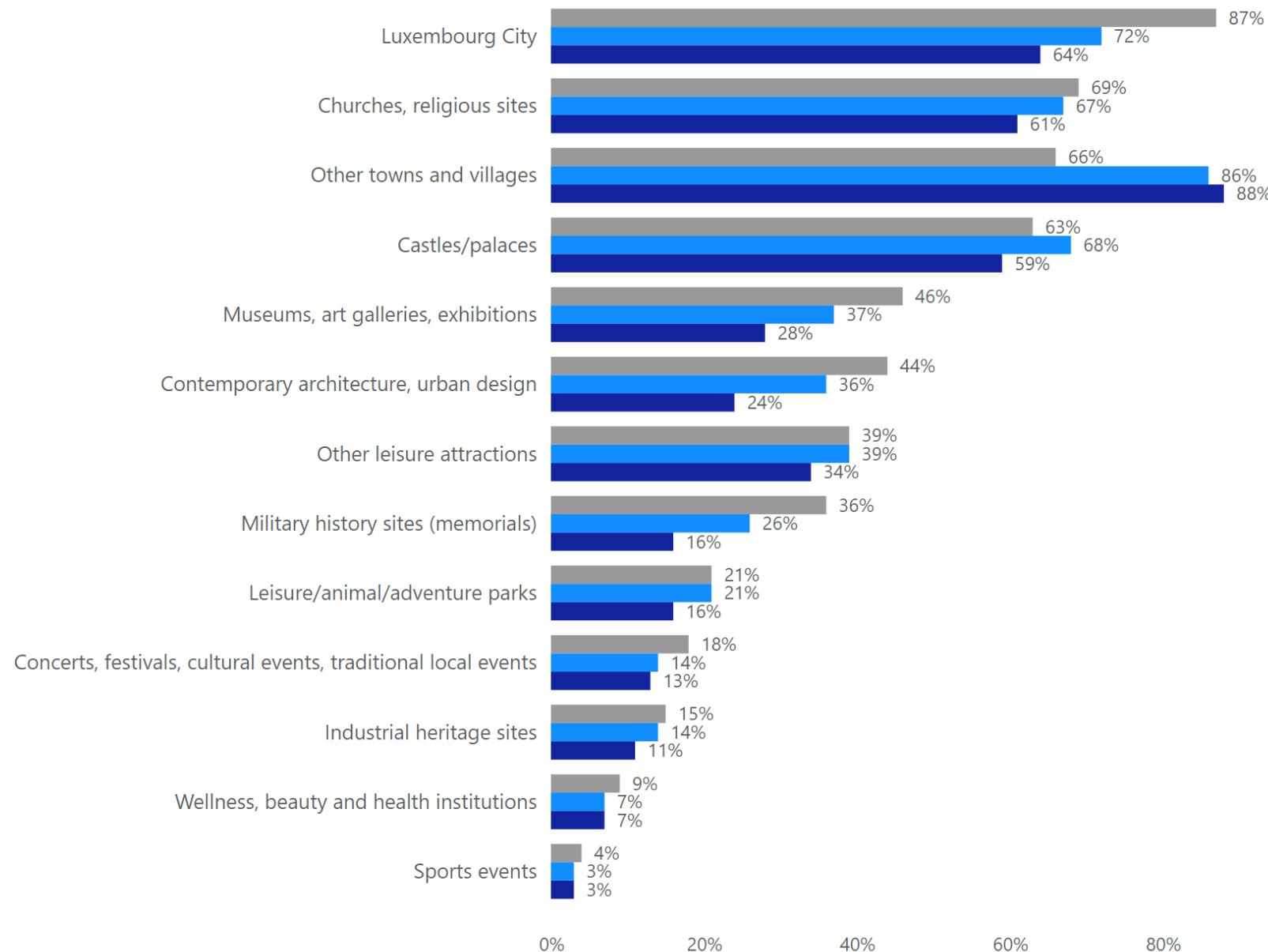
Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Places visited

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

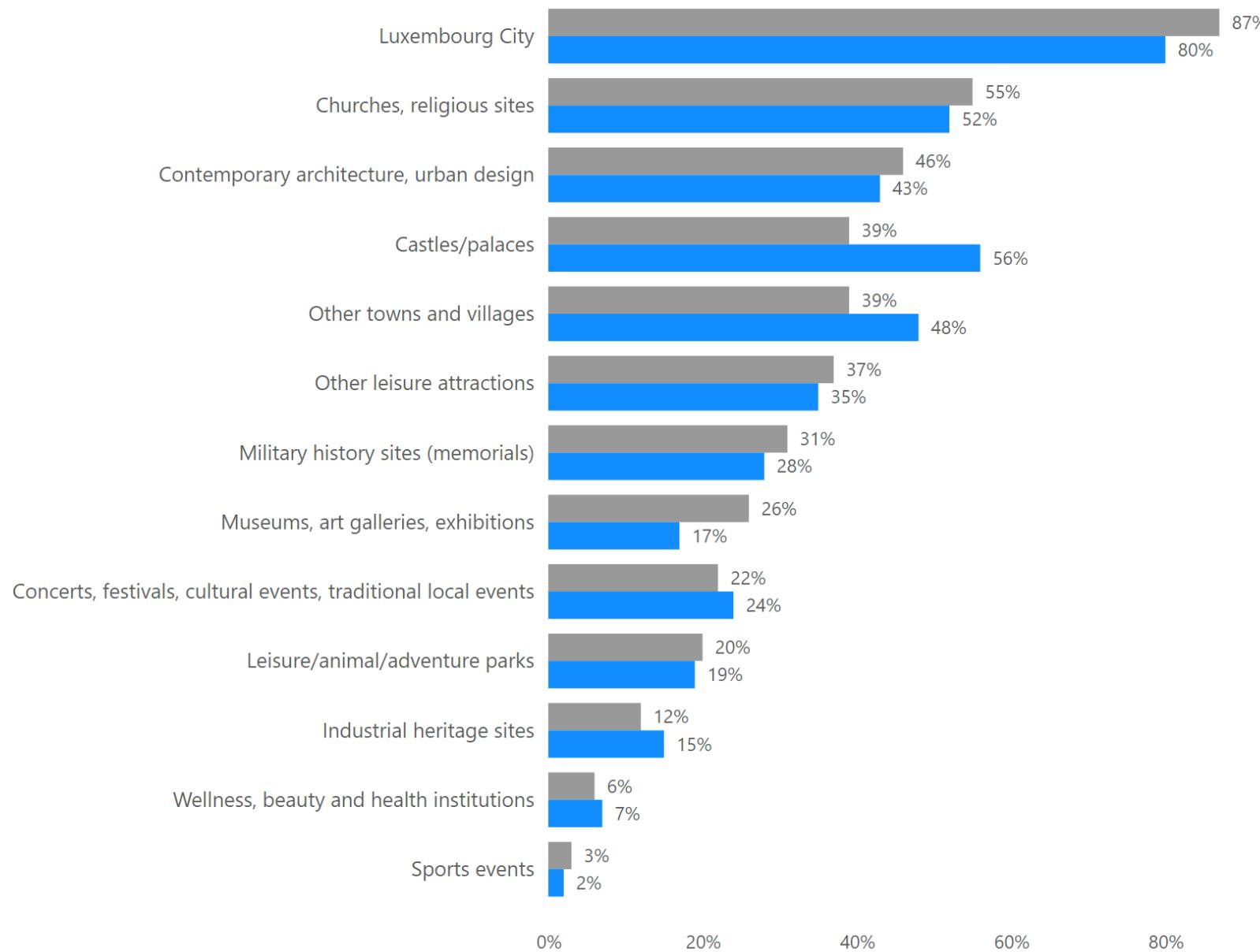


- Other towns and villages are mentioned the most by overall hiking visitors in regard to their visited places. For visitors with hiking as a component of their holiday trip, castles/palaces are mentioned slightly more often.
- Museums, contemporary architecture as well as military history sites are less often visited. Luxembourg City, being the most popular place among all visitors, is less popular for hiking visitors, yet still visited by about 2/3 of them.

## Places visited

### Same-day visitors

● All Inbound ● Hiking (excursion type)



- For same-day visitors, castles/palaces are an especially popular place to visit among hiking excursionists. Likewise to overnight visitors, other towns and village are also more often, and museums less often visited by hiking same-day visitors than all same-day travellers.

## Non-sporting activities

### Visitors with overnight

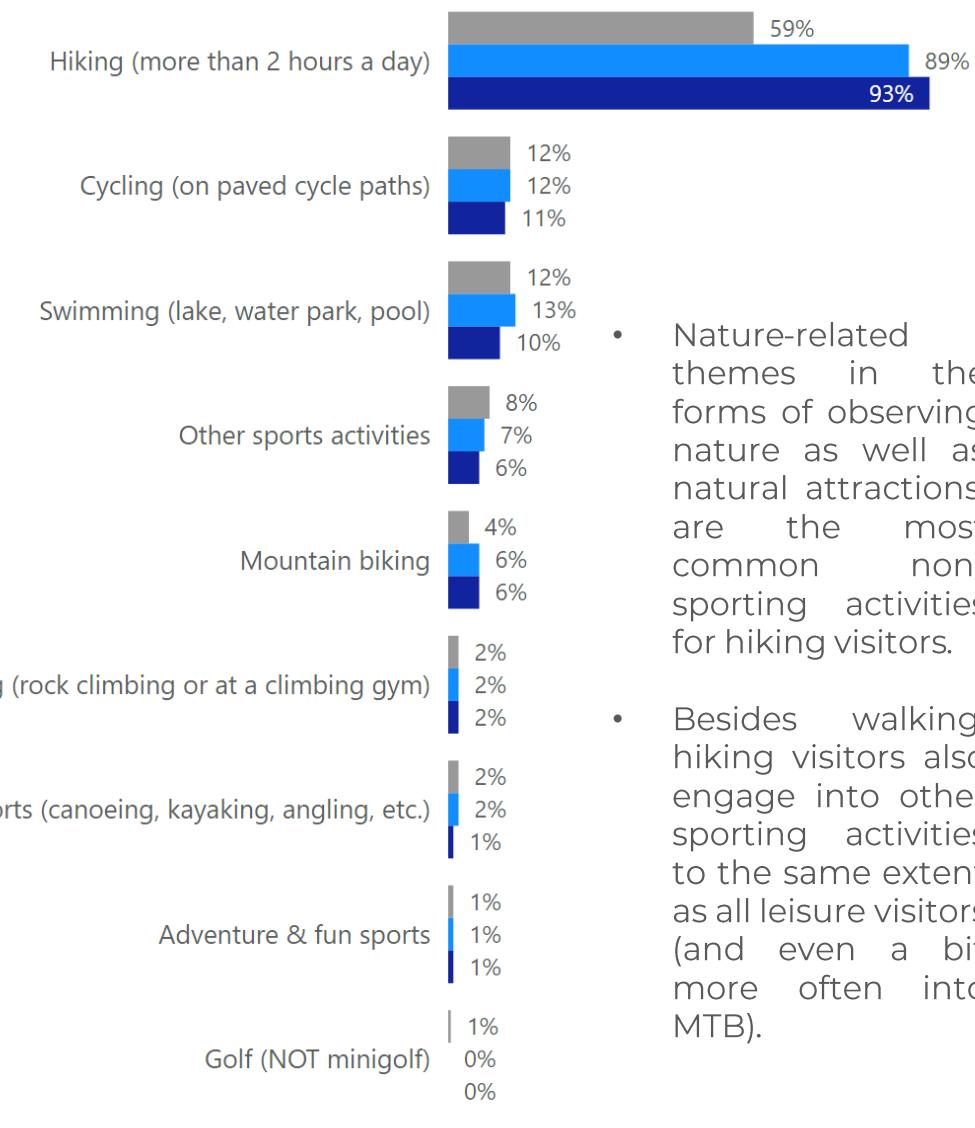
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Sporting activities

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



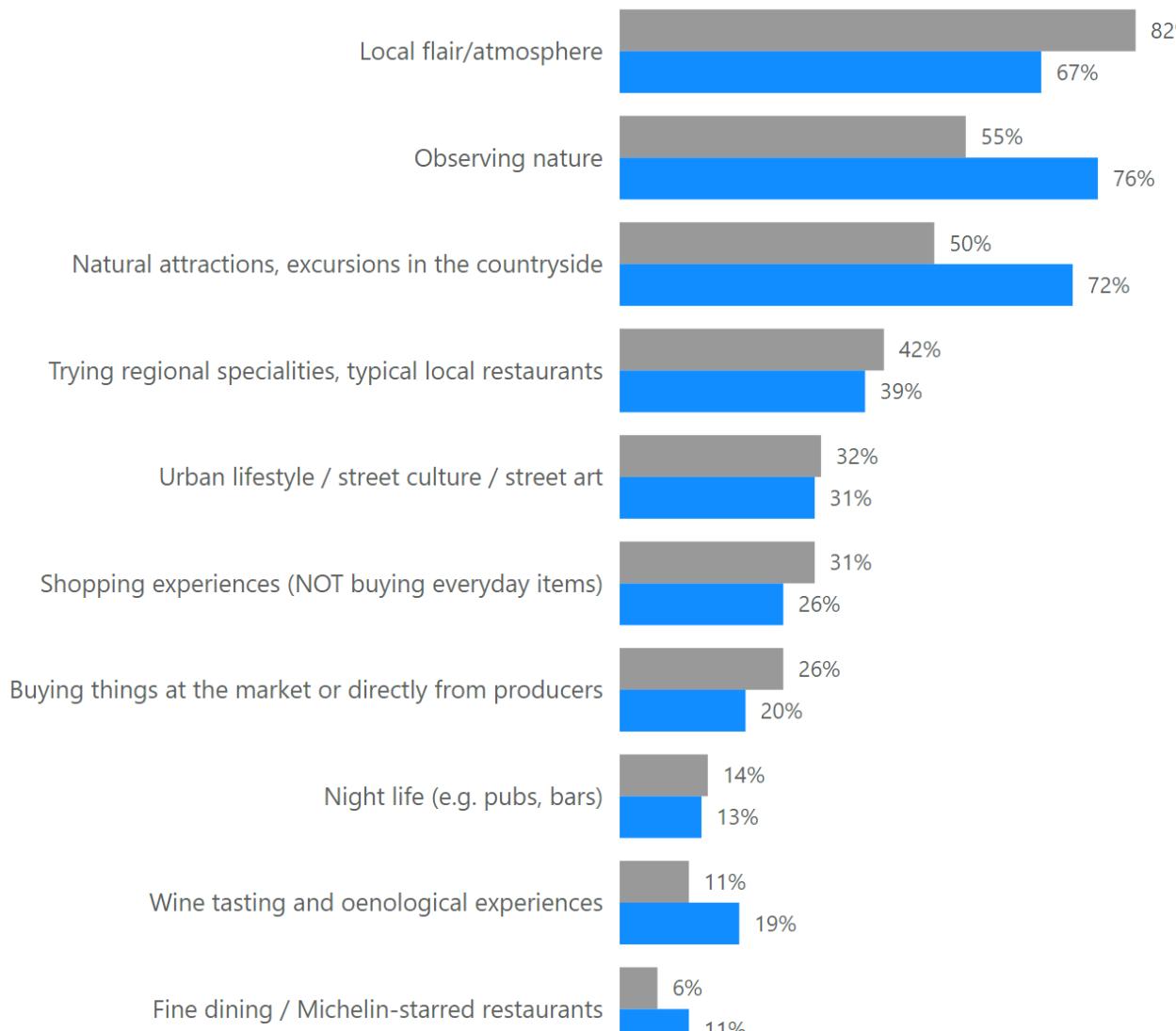
- Nature-related themes in the forms of observing nature as well as natural attractions, are the most common non-sporting activities for hiking visitors.

- Besides walking, hiking visitors also engage into other sporting activities to the same extent as all leisure visitors (and even a bit more often into MTB).

## Non-sporting activities

### Same-day visitors

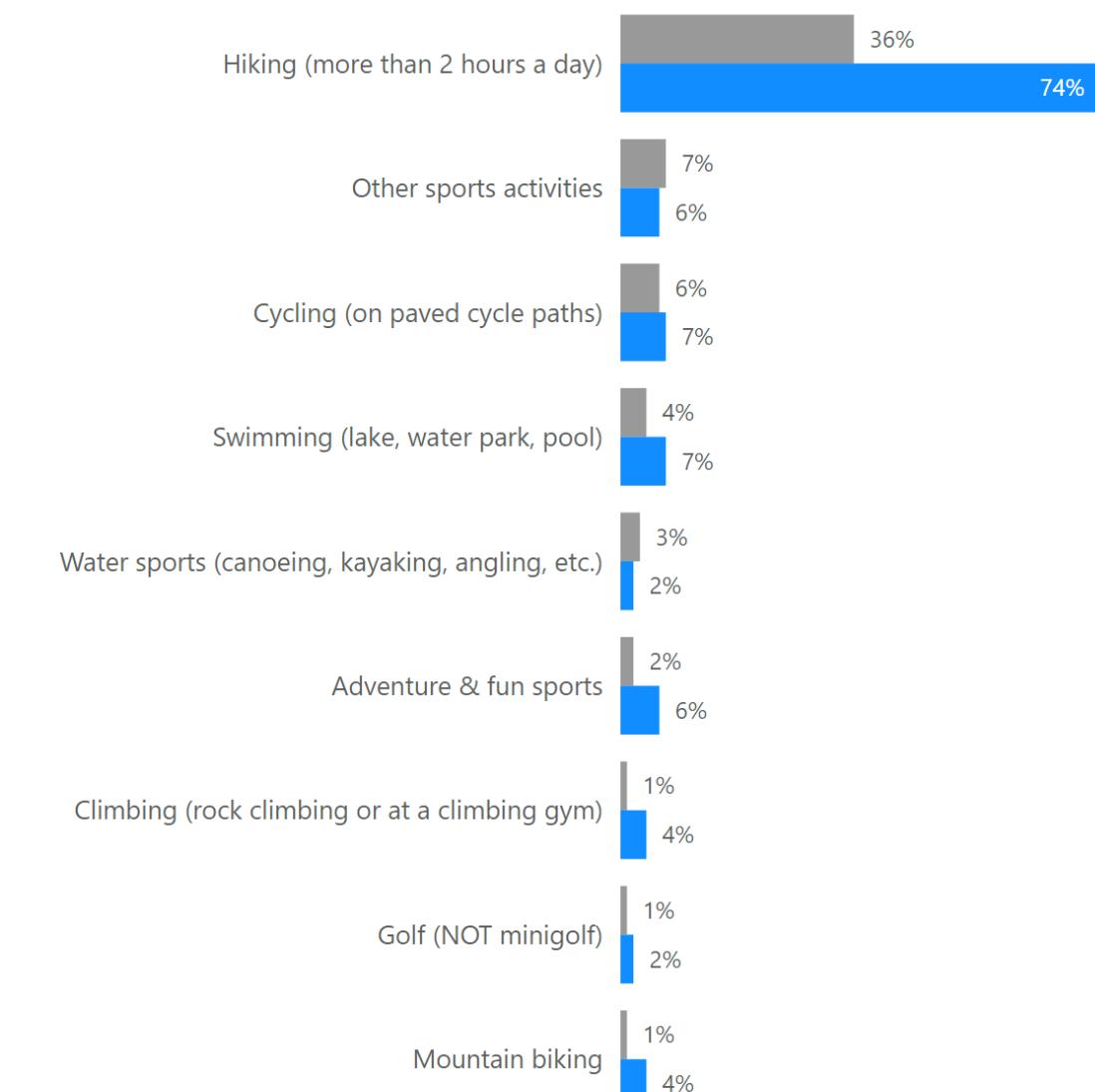
● All Inbound ● Hiking (excursion type)



## Sporting activities

### Same-day visitors

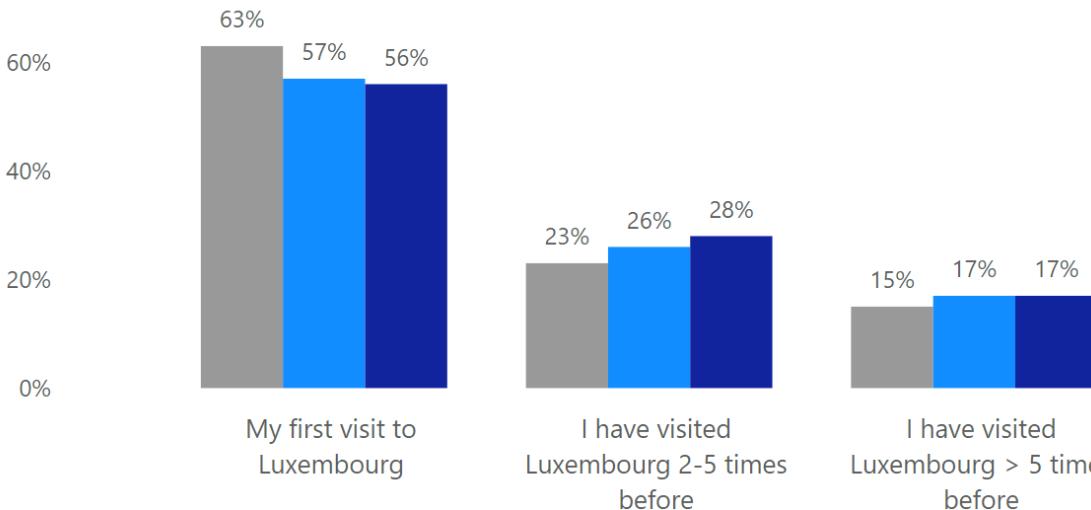
● All Inbound ● Hiking (excursion type)



## Frequency of visit

### Visitors with overnight

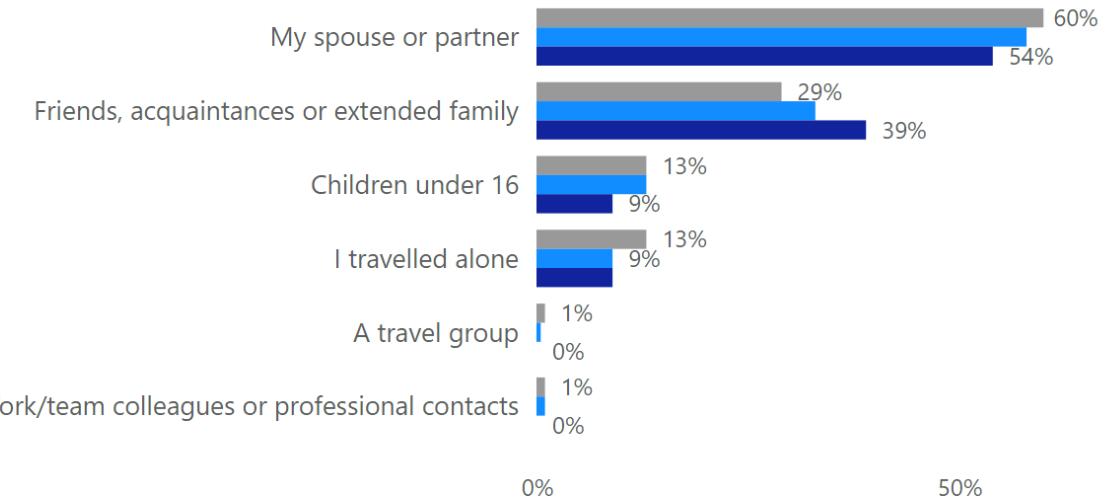
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Travel party

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## First-time visitors

### Visitors with overnight

**57%**

Hiking (holiday trip)

**56%**

Hiking (main holiday type)

**63%**

All Inbound

- Hiking visitors are less commonly first-time visitors and slightly more often visitors that have visited Luxembourg multiple times before.
- Regarding travel party, hiking visitors more often travel with friends and extended family compared to overall visitors. Nevertheless, spouse or partner are the most common travel party.

## Visitors spending nights in Luxembourg and abroad during same trip

### Visitors with overnight

**30%**

Hiking (holiday trip)

**31%**

Hiking (main holiday type)

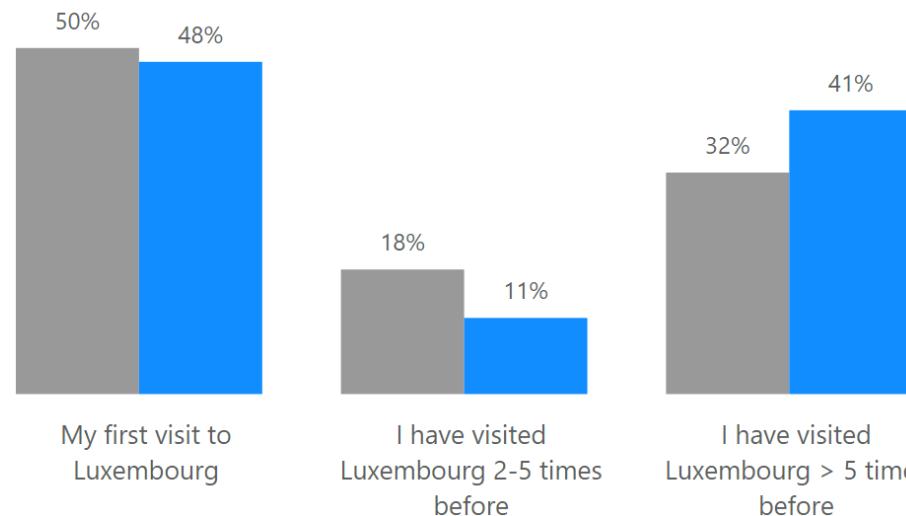
**39%**

All Inbound

## Frequency of visit

### Same-day visitors

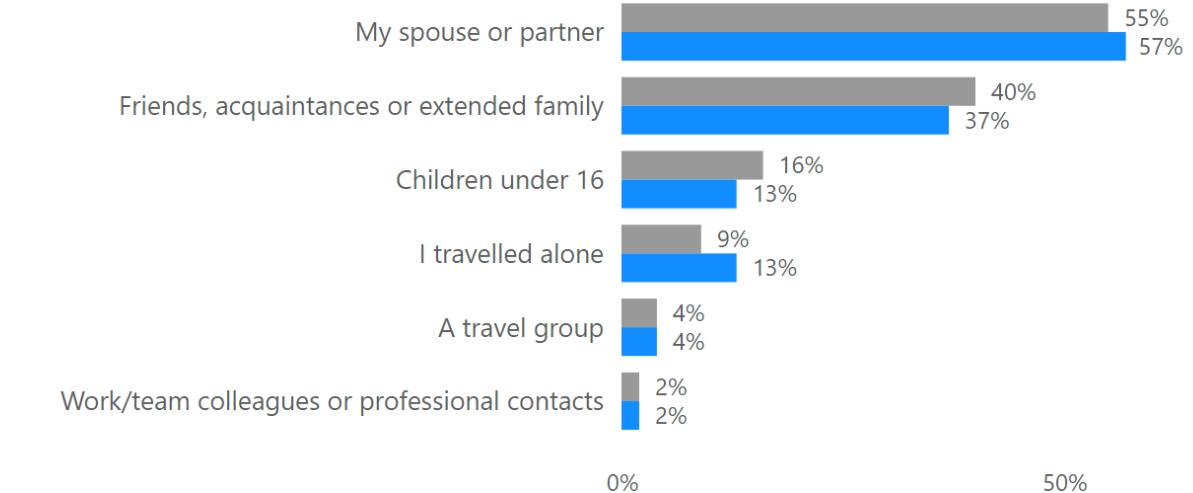
● All Inbound ● Hiking (excursion type)



## Travel party

### Same-day visitors

● All Inbound ● Hiking (excursion type)



## First-time visitors

### Same-day visitors

**48%**

Hiking (excursion type)

**50%**

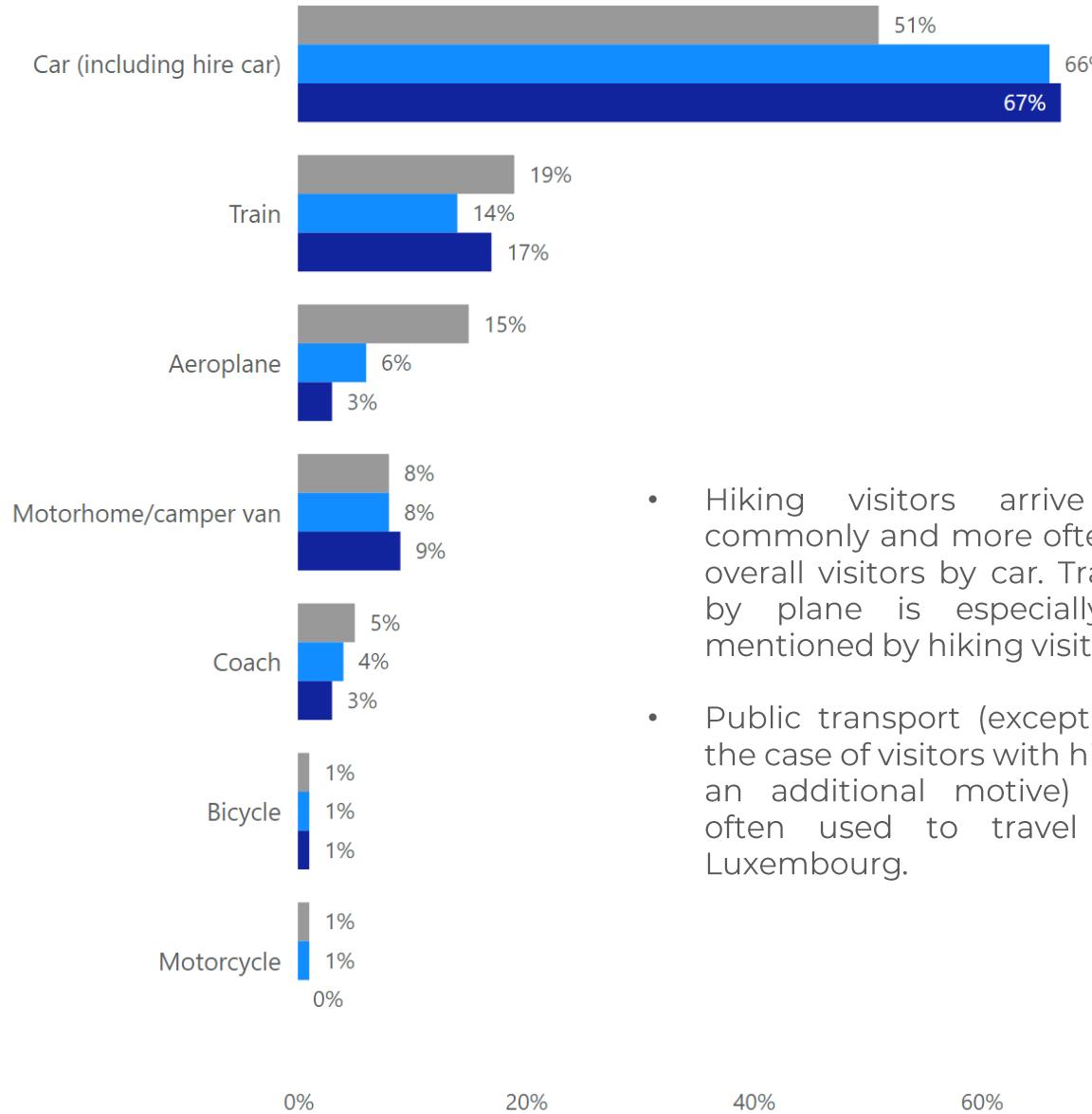
All Inbound

- For same-day visitors, hiking visitors indicate more often than overall visitors that they have visited Luxembourg for than 5 times.
- Hiking same-day visitors also travel slightly more often alone.

## Transport to destination

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

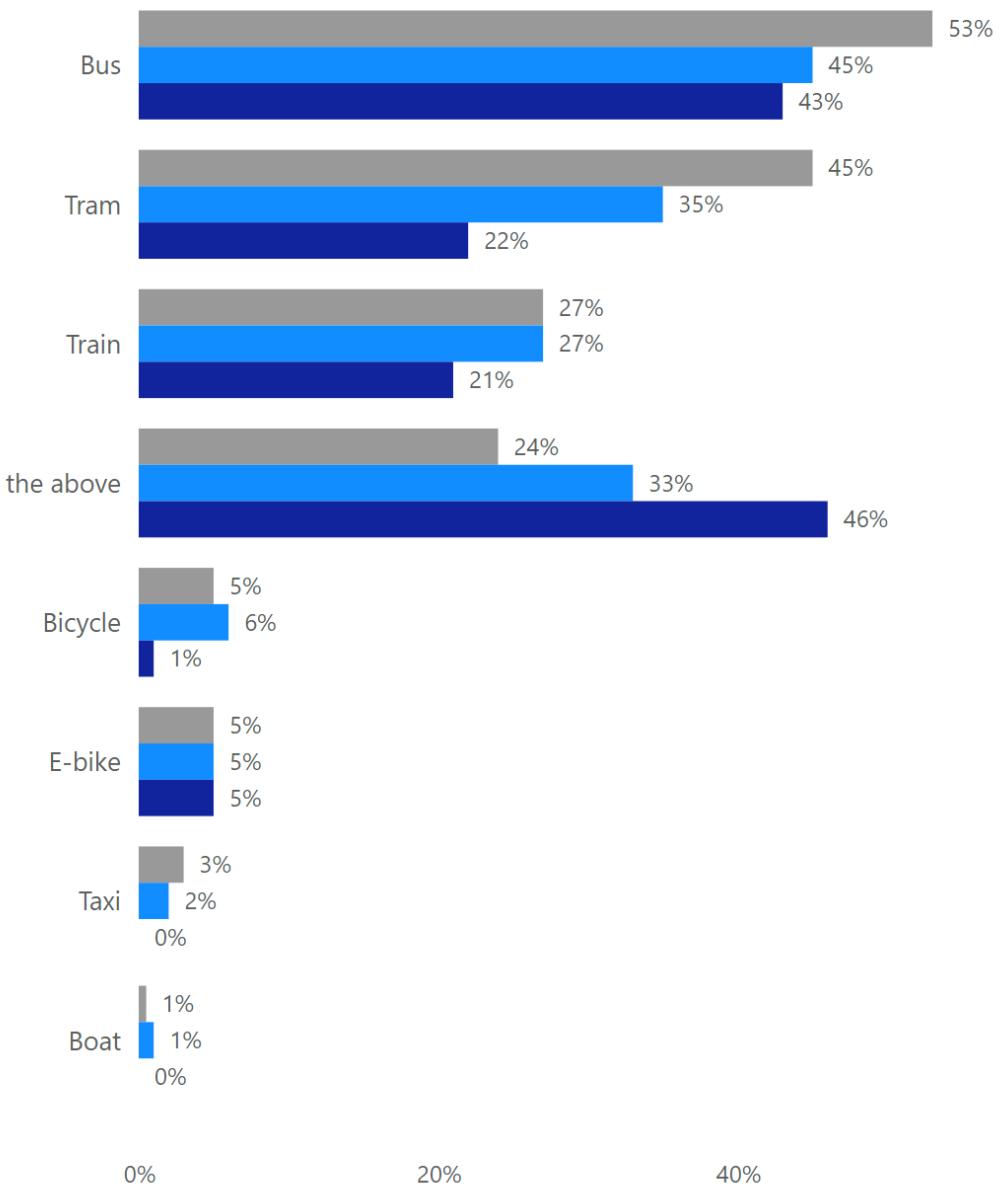


- Hiking visitors arrive most commonly and more often than overall visitors by car. Travelling by plane is especially little mentioned by hiking visitors.
- Public transport (except rail, in the case of visitors with hiking as an additional motive) is less often used to travel across Luxembourg.

## Transport in destination

### Visitors with overnight

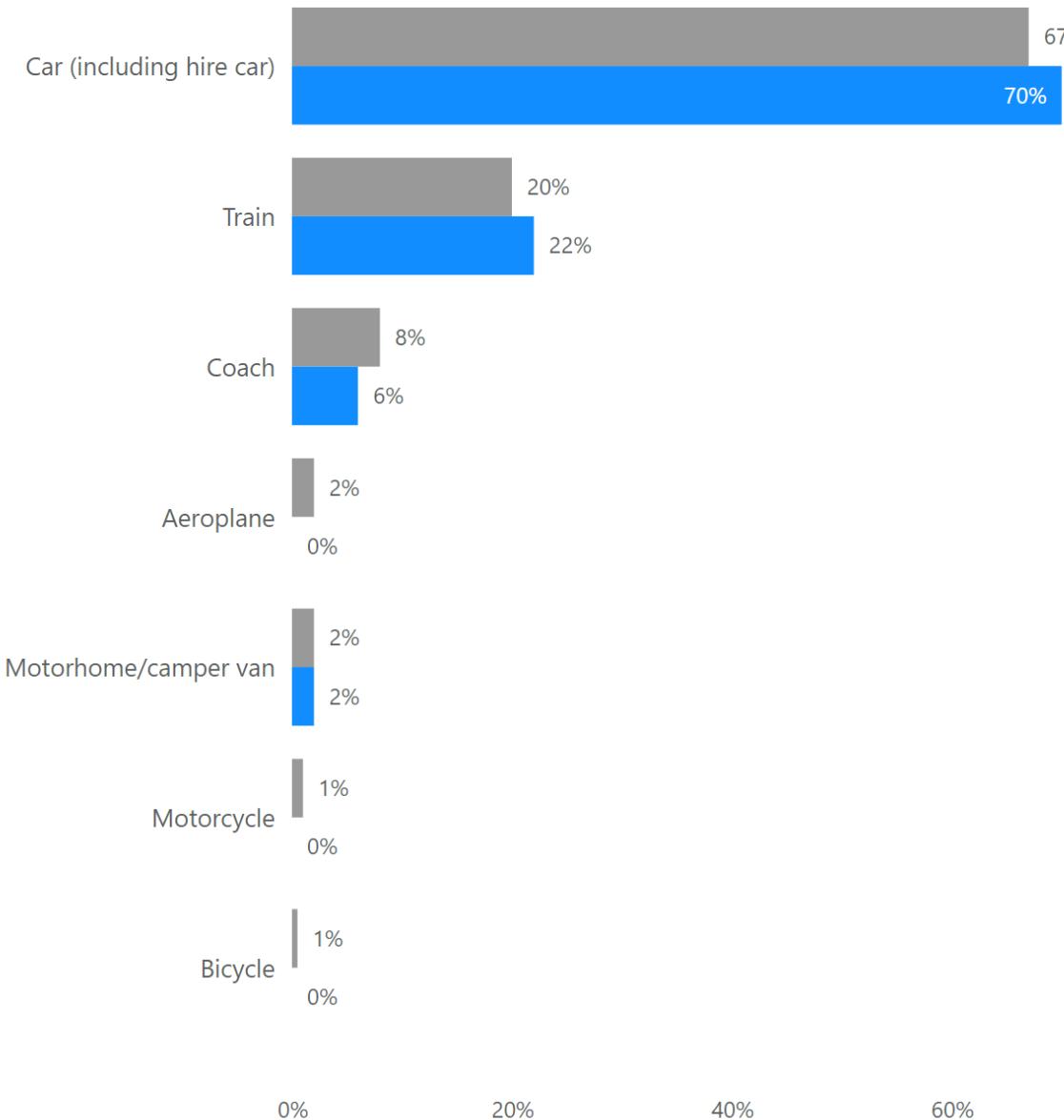
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Transport to destination

### Same-day visitors

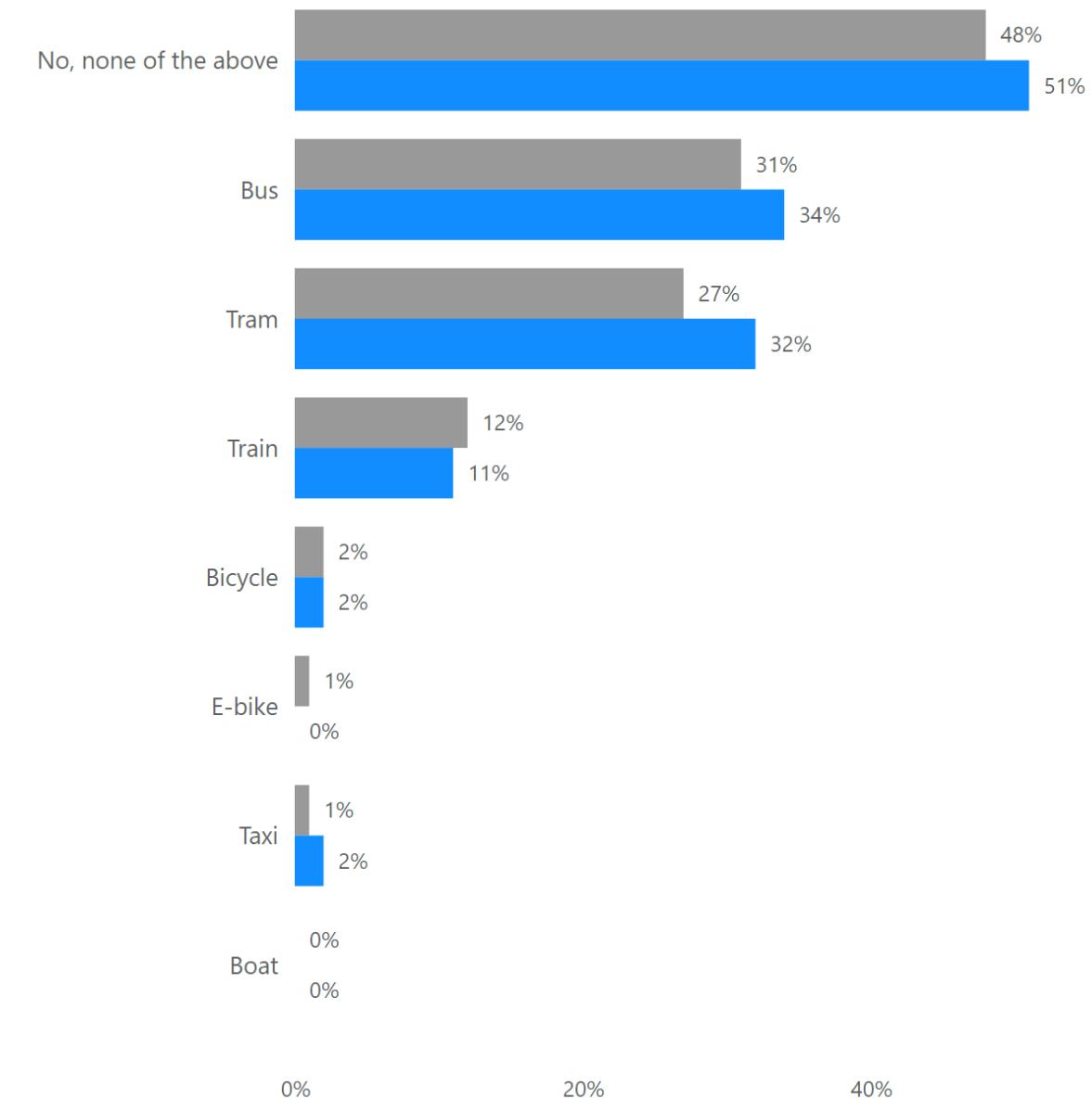
● All Inbound ● Hiking (excursion type)



## Transport in destination

### Same-day visitors

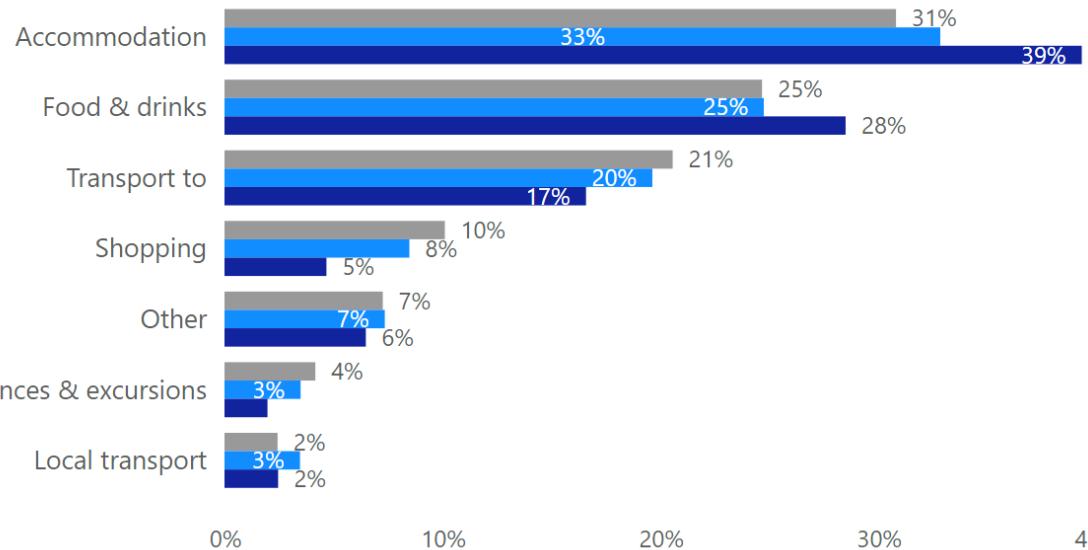
● All Inbound ● Hiking (excursion type)



## Spending categories

### Visitors with overnight

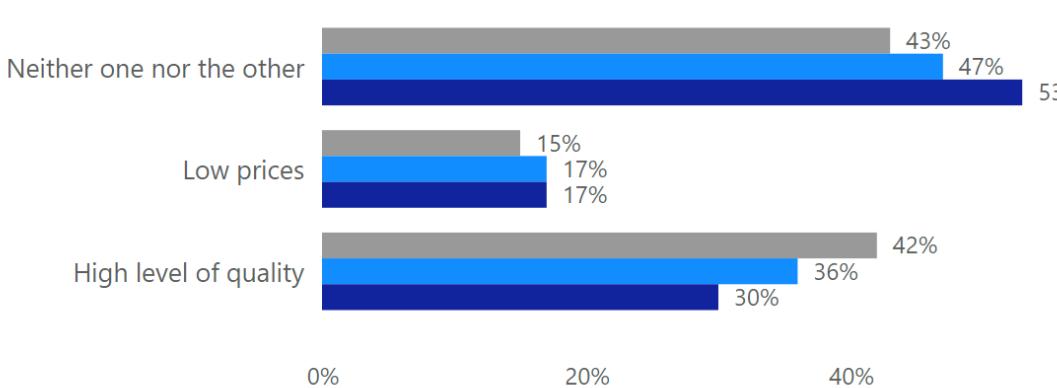
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Quality vs. price orientation

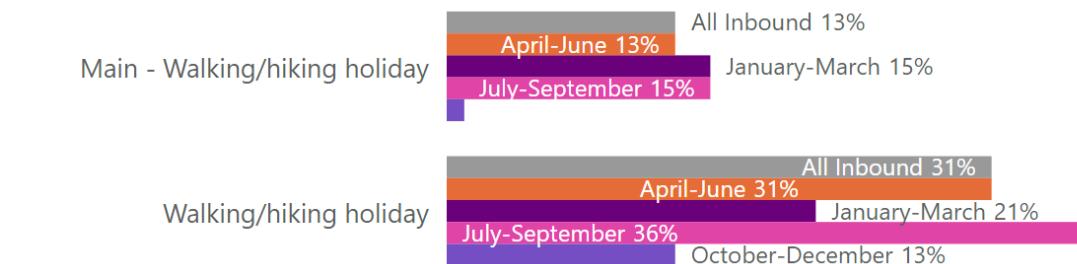
### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Shares by arrival months

### Visitors with overnight



- Hiking visitors spend more on accommodation and slightly more on food and drinks. Hiking visitors only make up a small share of visitors travelling in autumn and winter (although this is less marked among same-day visitors), and stay marginally longer than all leisure travellers.

## Spend/pers./trip

### Visitors with overnight

**604 €**

Hiking (holiday trip)

## Spend/pers./night

### Visitors with overnight

**141 €**

Hiking (holiday trip)

## Length of stay (nights)

### Visitors with overnight

**4,3**

Hiking (holiday trip)

## 534 €

Hiking (main holiday type)

## 131 €

Hiking (main holiday type)

## 4,1

Hiking (main holiday type)

## 619 €

All Inbound

## 160 €

All Inbound

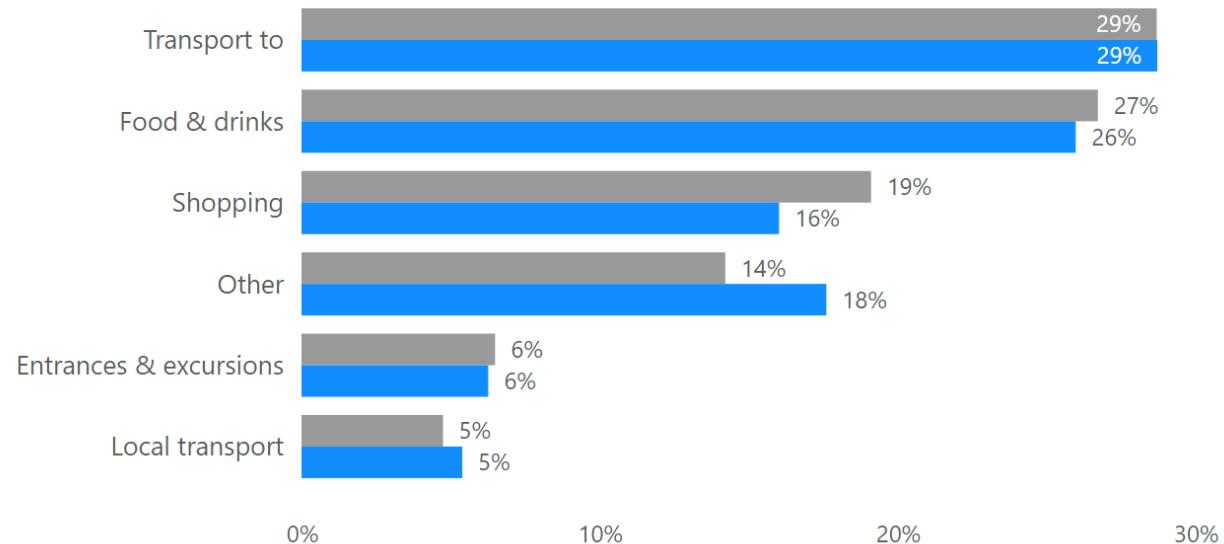
## 3,9

All Inbound

## Spending categories

### Same-day visitors

● All Inbound ● Hiking (excursion type)



### Spend/pers./excurs.

#### Same-day visitors

**169 €**

Hiking (excursion type)

**245 €**

All Inbound

## Shares by arrival months

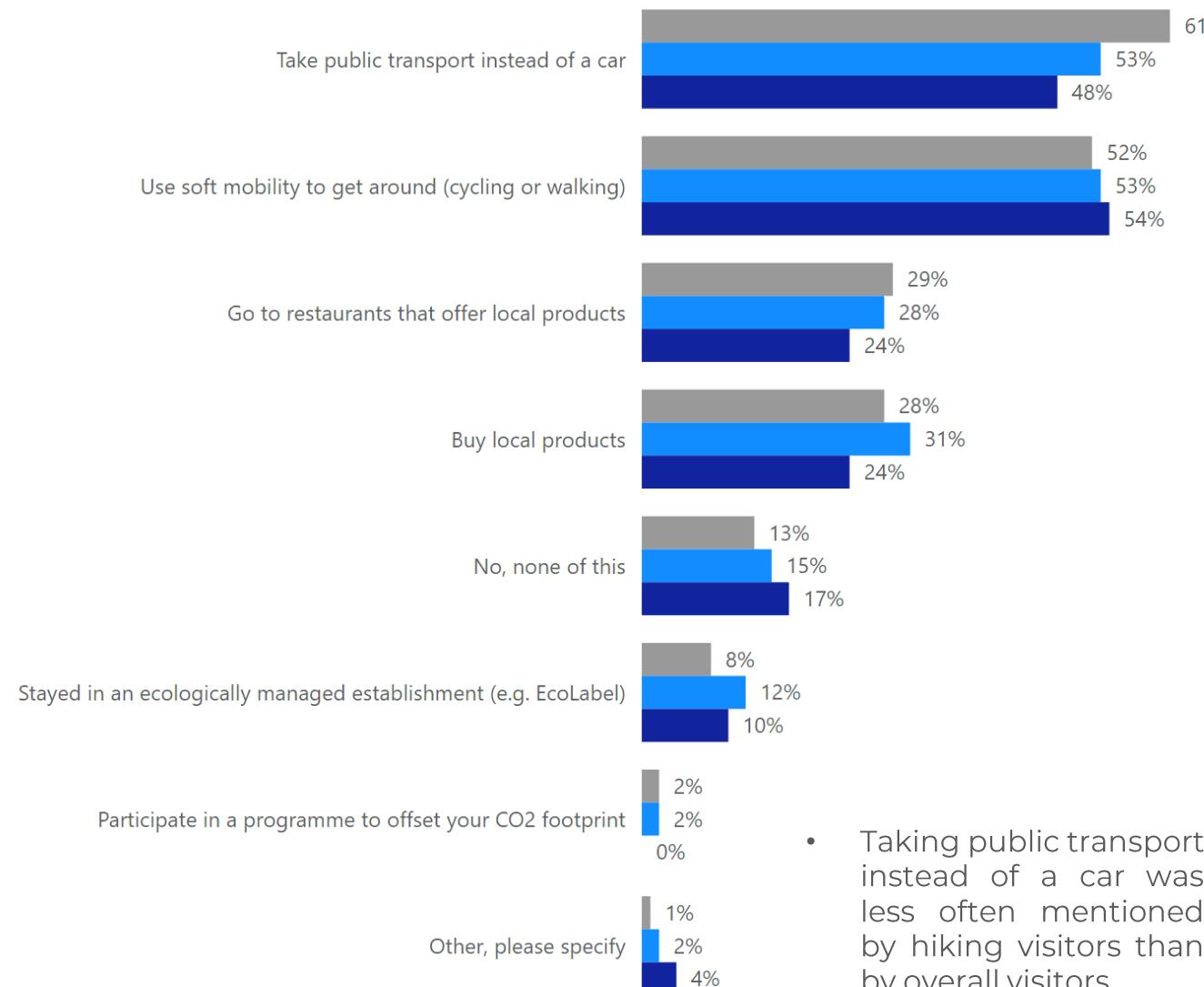
### Same-day visitors



## Sustainable actions during stay

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

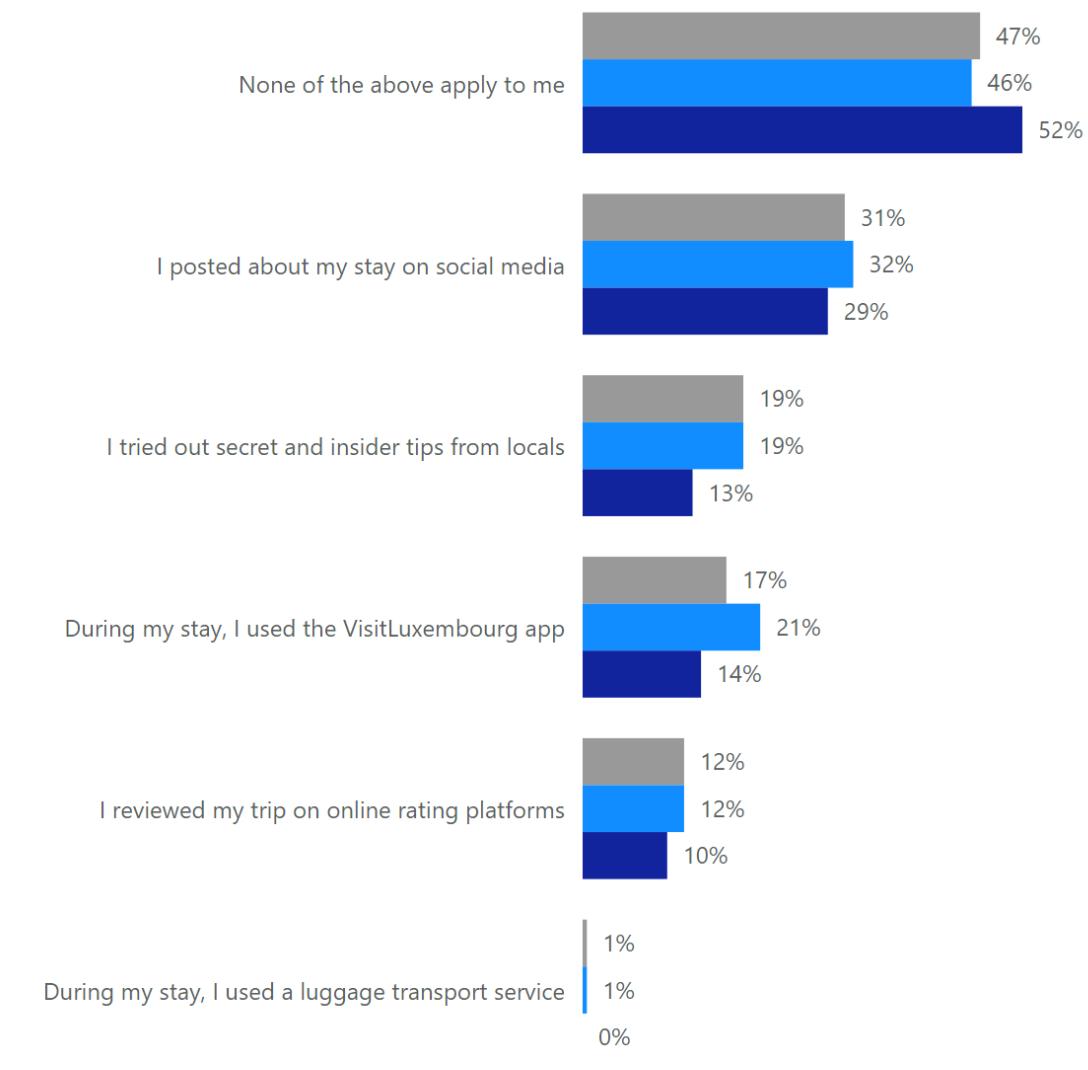


- Taking public transport instead of a car was less often mentioned by hiking visitors than by overall visitors.

## Services used during stay

### Visitors with overnight

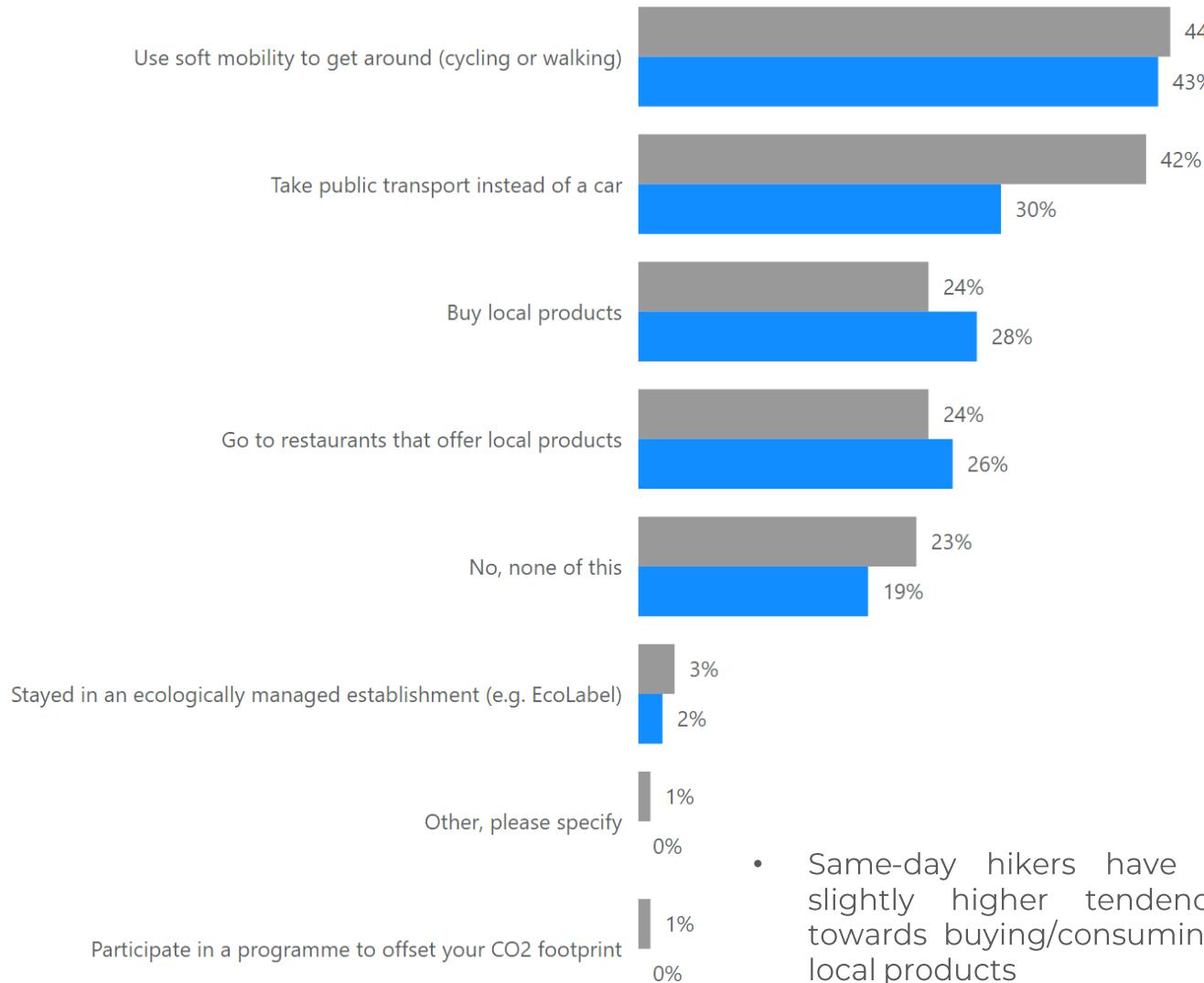
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Sustainable actions during stay

### Same-day visitors

● All Inbound ● Hiking (excursion type)

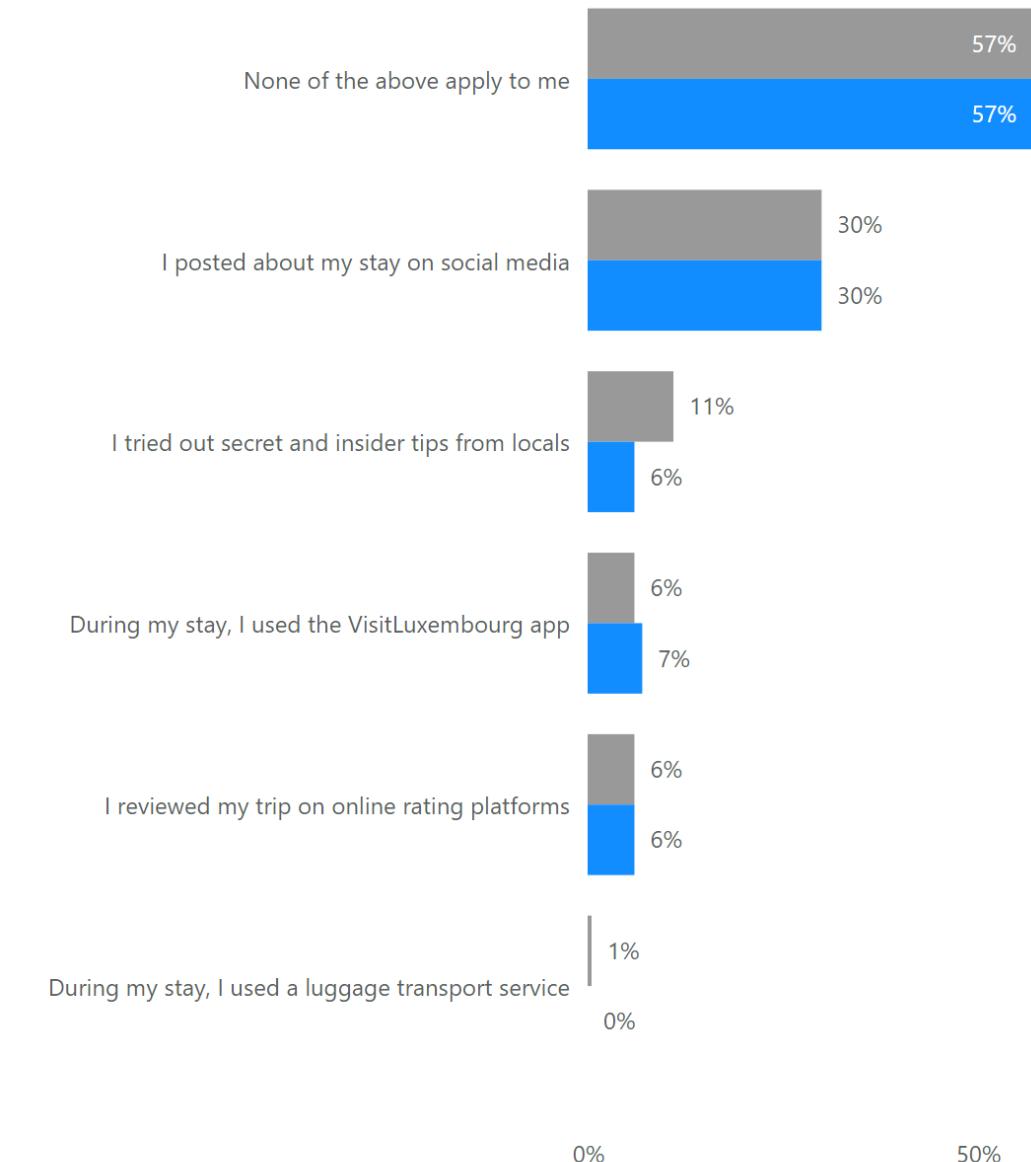


- Same-day hikers have a slightly higher tendency towards buying/consuming local products

## Services used during stay

### Same-day visitors

● All Inbound ● Hiking (excursion type)

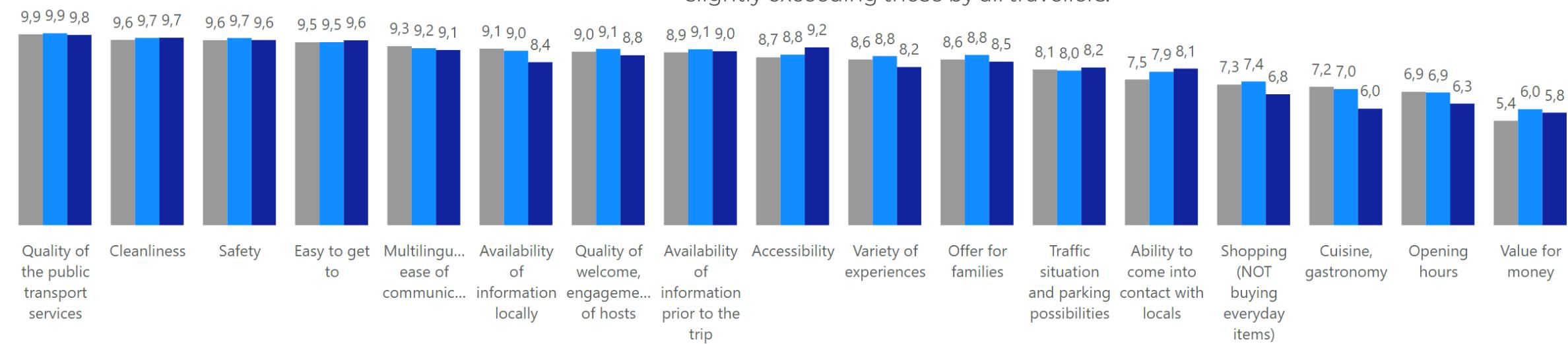


## Satisfaction items

### Visitors with overnight

Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

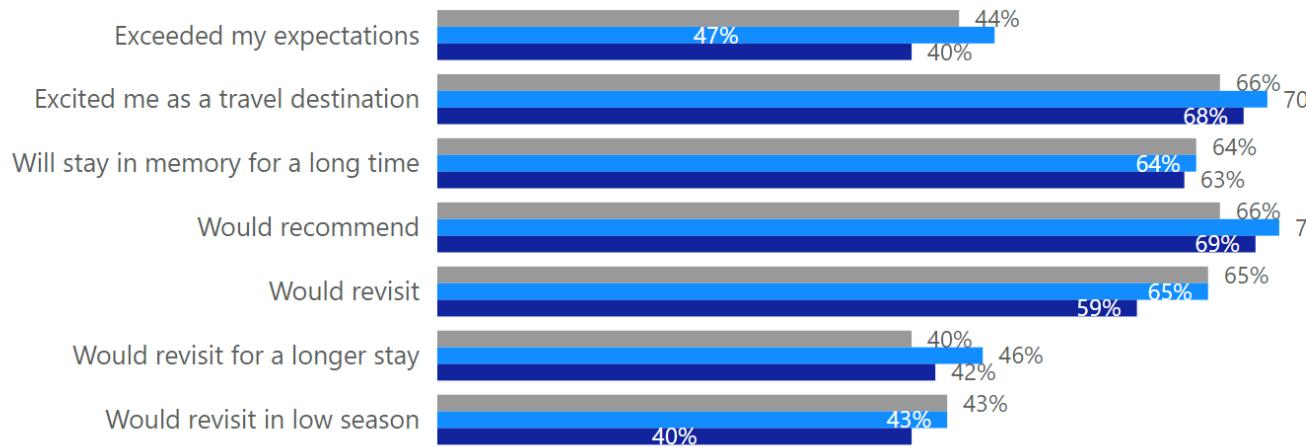
- In general, hiking visitors, especially those with hiking as a holiday trip, show similar satisfaction to overall visitors with some exceptions (opening hours, accessibility, gastronomy, availability of information locally – see chart). Recommendation levels are slightly exceeding those by all travellers.



### Overall satisfaction - % "strongly agree"

### Visitors with overnight

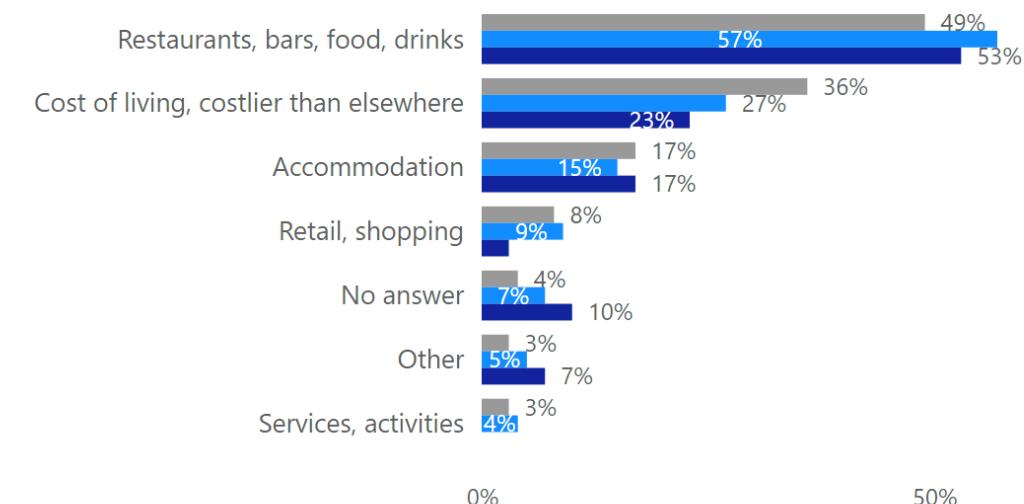
Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



### Reasons for poor value-for-money

### Visitors with overnight

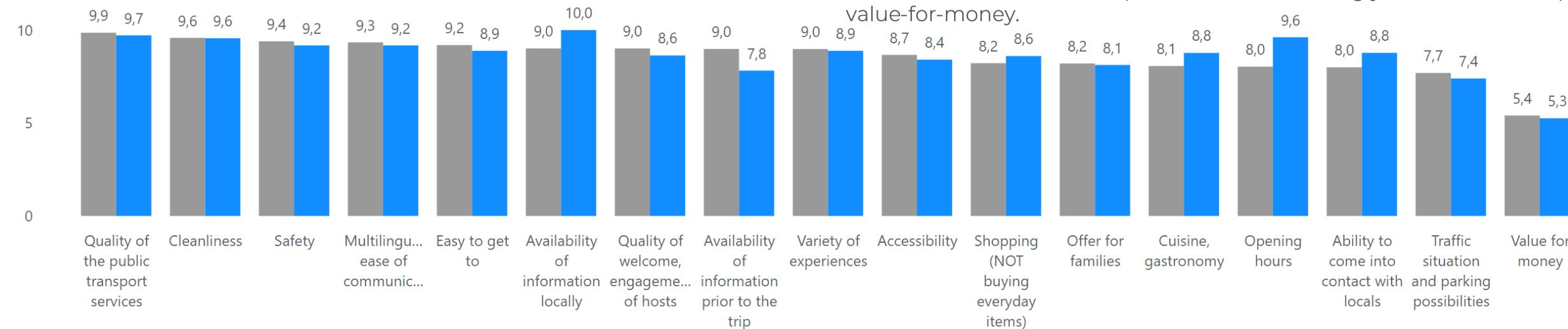
Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Satisfaction items

### Same-day visitors

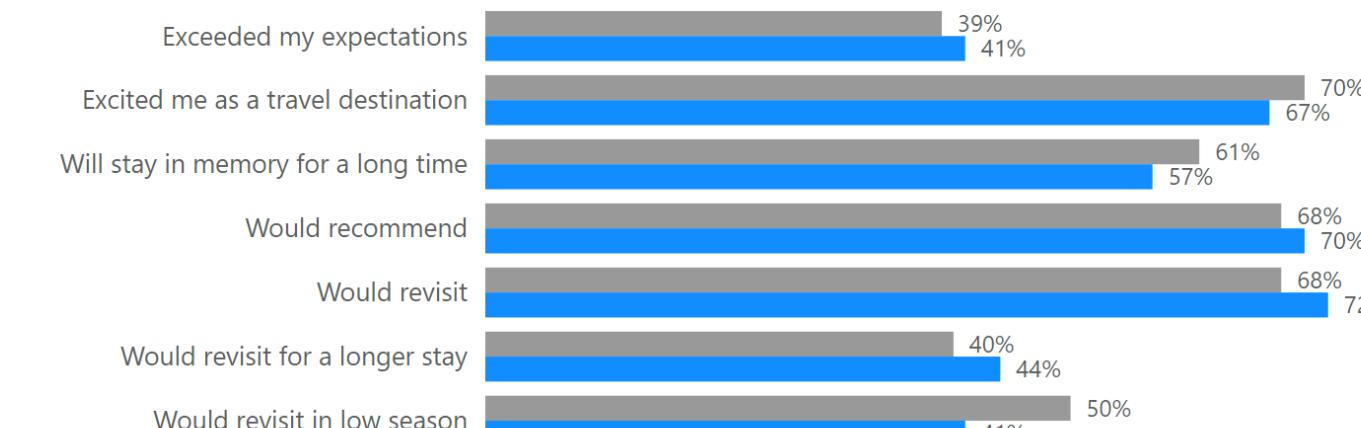
Attribut ● All Inbound ● Hiking (excursion type)



## Overall satisfaction - % "strongly agree"

### Same-day visitors

Attribut ● All Inbound ● Hiking (excursion type)

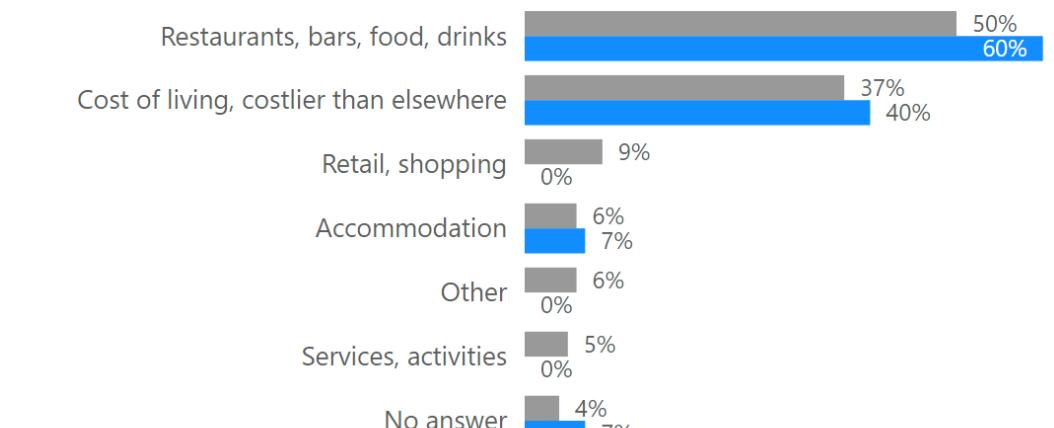


- Contrary to overnight hiking visitors, same-day hikers indicate a perfect score regarding the availability of information locally as well as much higher score for opening hours.
- Restaurants and food are perceived more strongly as a reason for poor value-for-money.

## Reasons for poor value-for-money

### Same-day visitors

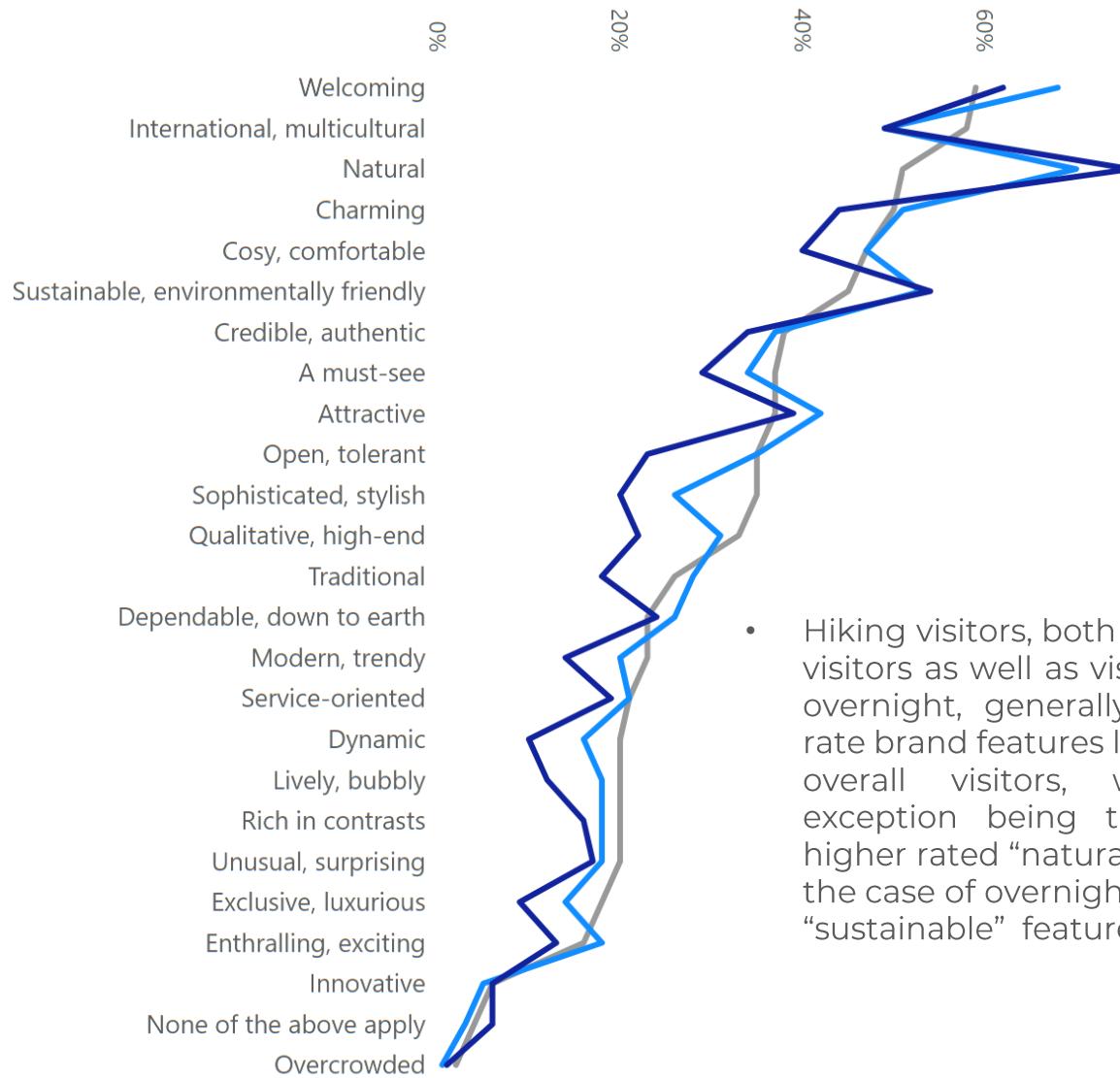
Attribut ● All Inbound ● Hiking (excursion type)



## Brand features

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

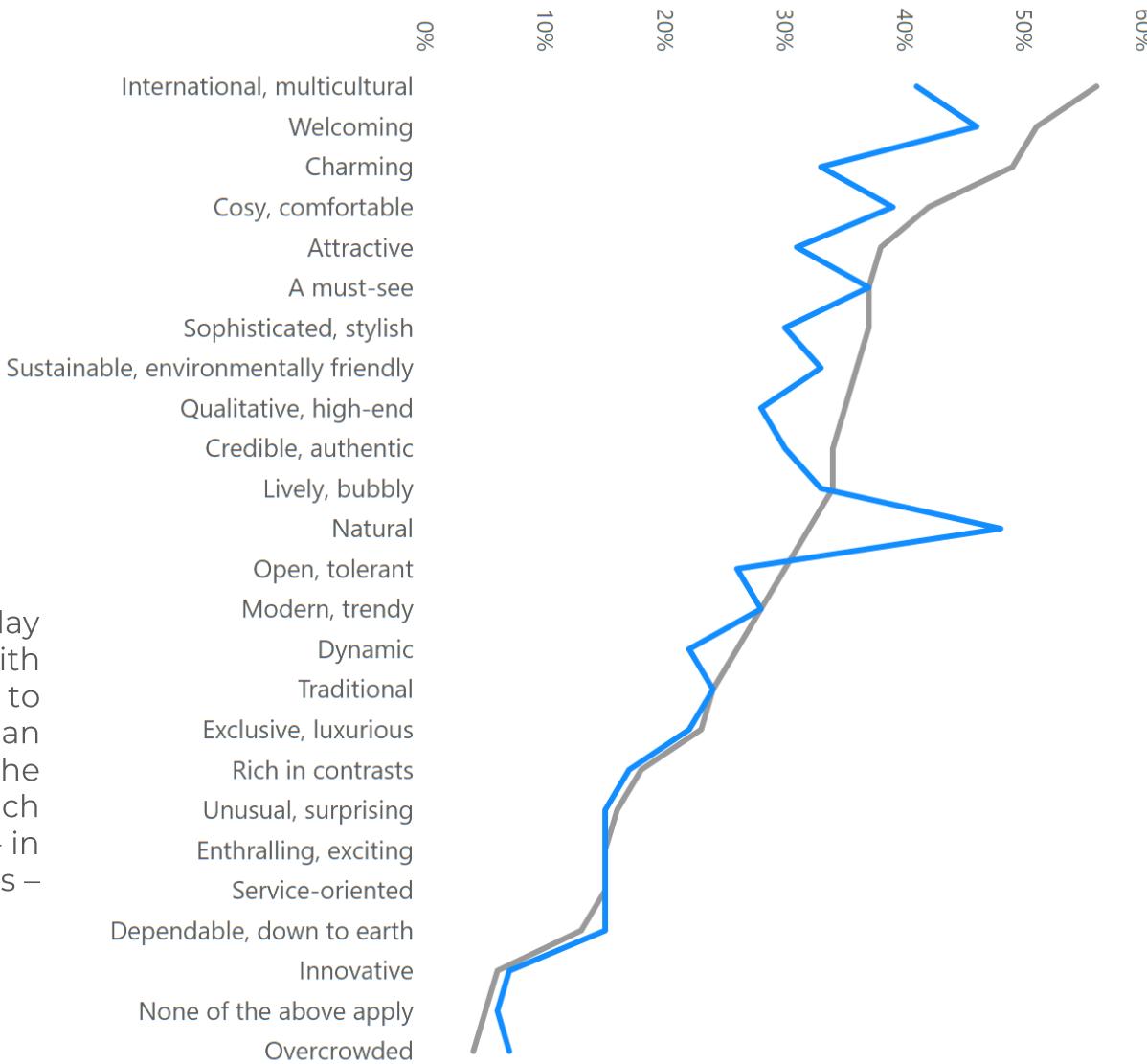


- Hiking visitors, both same-day visitors as well as visitors with overnight, generally tend to rate brand features lower than overall visitors, with the exception being the much higher rated “natural” and – in the case of overnight visitors – “sustainable” features.

## Brand features

### Same-day visitors

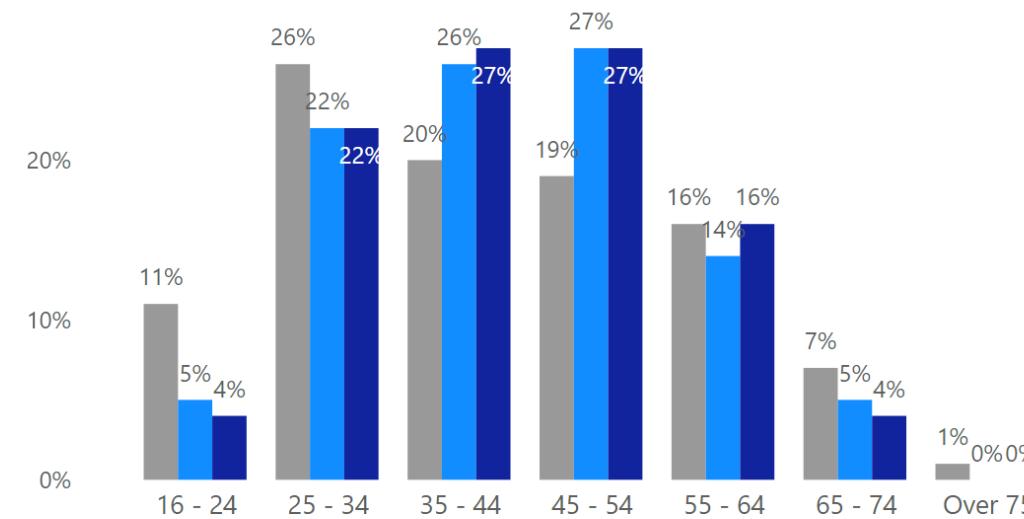
● All Inbound ● Hiking (excursion type)



## Age

### Visitors with overnight

● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)

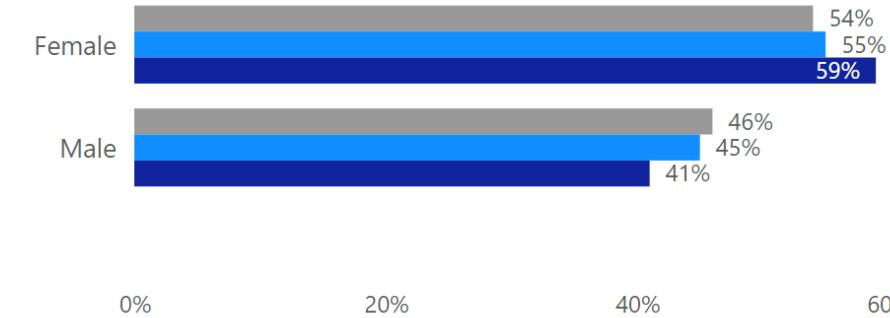


- More than 50% of hiking visitors are aged between 35 and 54 years.
- Gender, education and employment show mostly slight differences between hikers and non-hikers.

## Gender

### Visitors with overnight

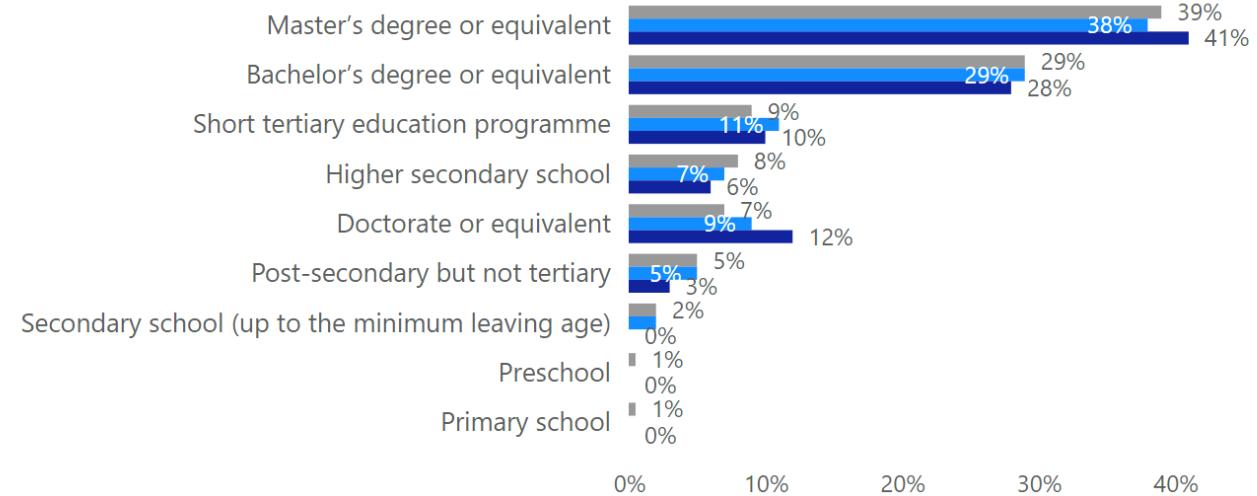
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Education

### Visitors with overnight

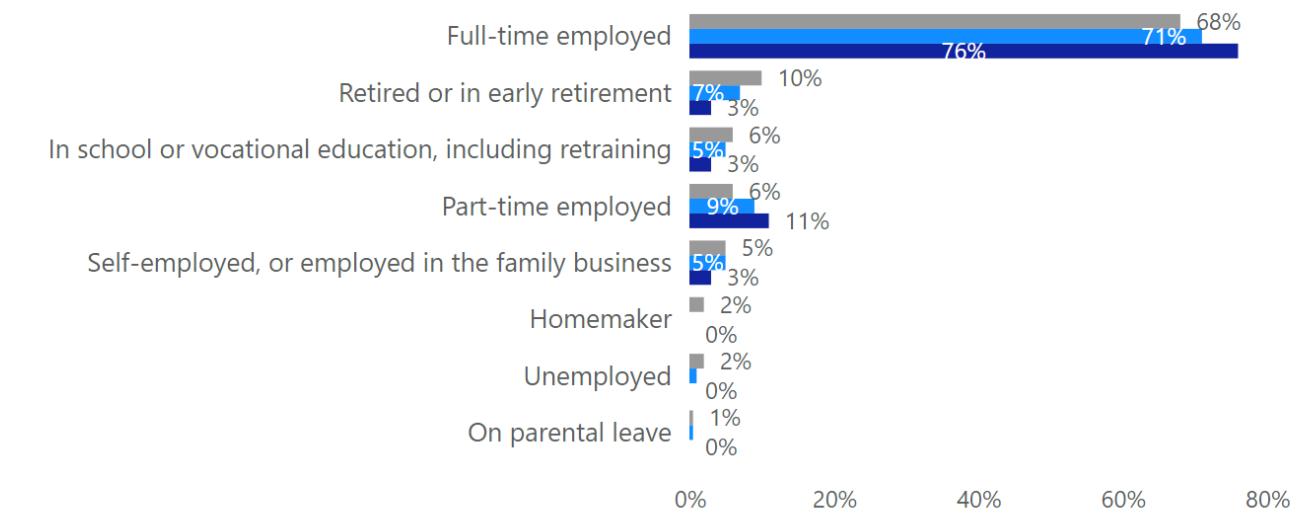
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Employment

### Visitors with overnight

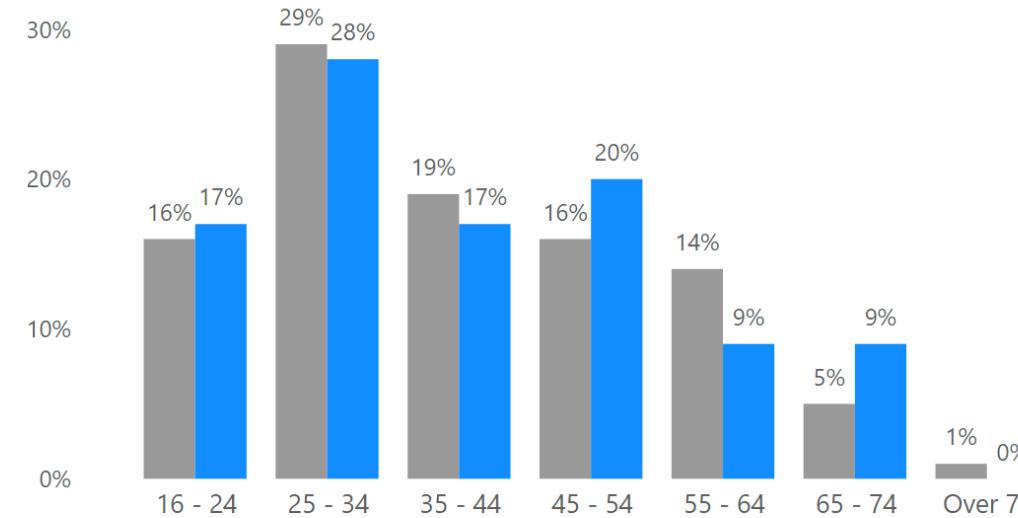
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



## Age

### Same-day visitors

● All Inbound ● Hiking (excursion type)

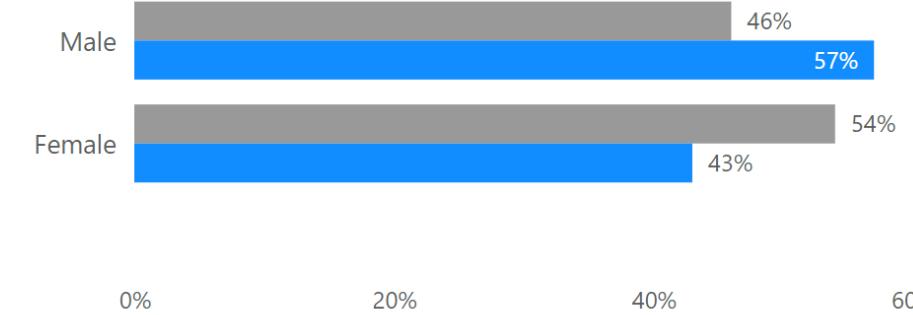


- For same-day visitors, the gender ratio is inverse for hiking visitors in comparison to all excursionists, and also to overnight hiking visitors.

## Gender

### Same-day visitors

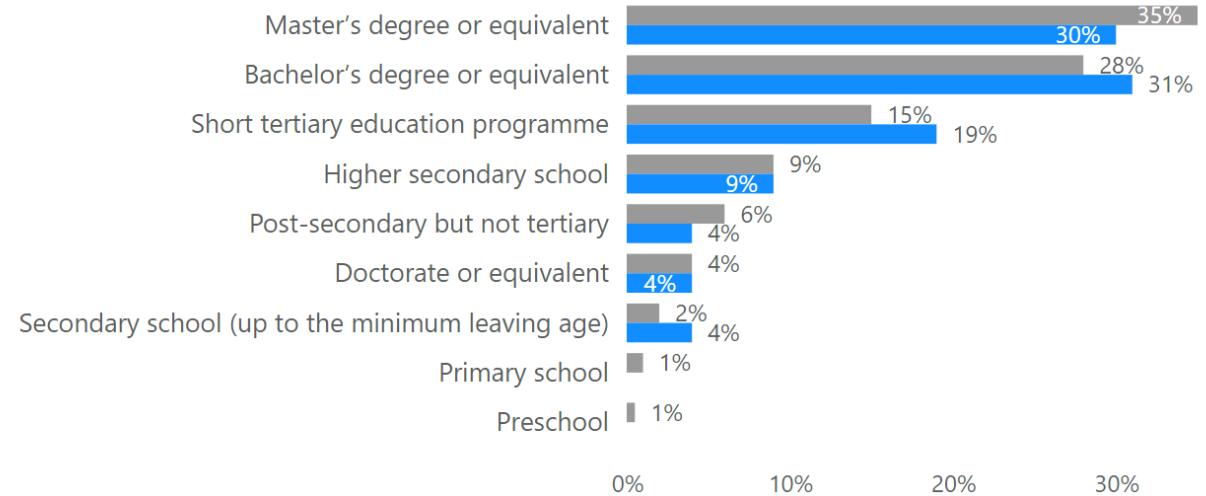
● All Inbound ● Hiking (excursion type)



## Education

### Same-day visitors

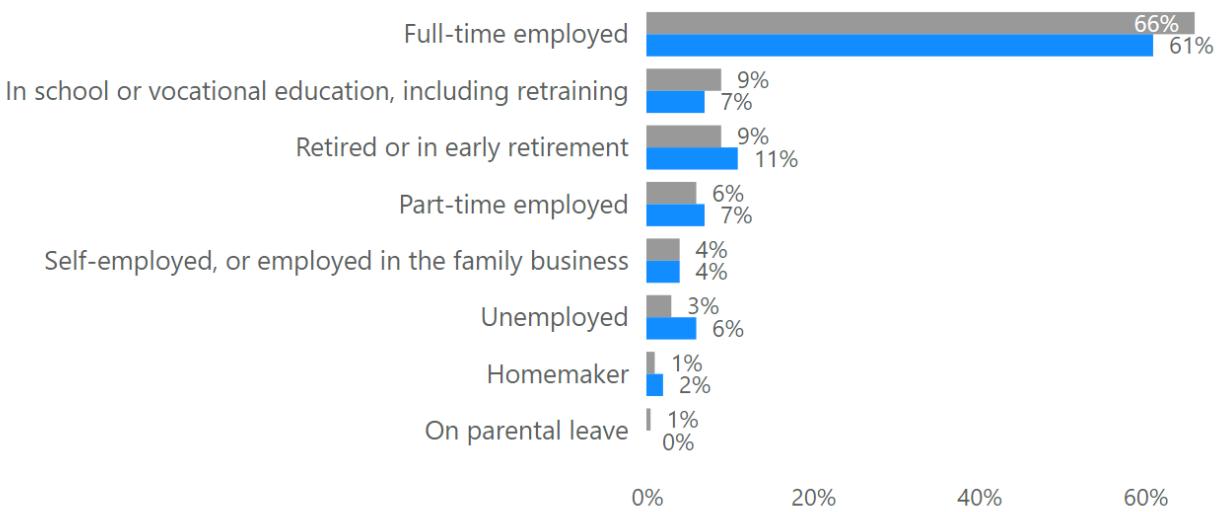
● All Inbound ● Hiking (excursion type)



## Employment

### Same-day visitors

● All Inbound ● Hiking (excursion type)





# **Destination Awareness & Growth Potential for Hiking segment**

# General theme interest – Hiking



	Rank (*)	Number of themes surveyed	% „very interested“ in theme	% „interested“ in theme	% „interested“, Ø all themes	„Interested“ in theme, pop., mn (**)
Average Europe	17	33	-	55%	54%	-
	18	33	28%	49%	52%	29,6
	9	33	38%	61%	53%	7,8
	17	33	25%	55%	54%	3,6
	17	33	27%	53%	53%	3,5
	10	33	36%	60%	51%	5,0
	17	33	26%	54%	55%	25,4
	16	33	25%	54%	53%	26,2
	13	38	38%	67%	57%	28,6
	23	38	25%	55%	57%	18,8
	7	21	28%	61%	47%	17,1
	20	24	18%	41%	54%	1,4
	14	24	24%	51%	51%	2,1
	17	24	18%	47%	52%	3,4
	13	24	30%	62%	60%	4,7

General interest in the respective themes when going on a holiday  
% of respondents agreeing.

(\*) Rank among all surveyed themes in respective source markets.  
(\*\*) Aged 18-75.

# Luxembourg's perceived theme competence - Hiking



	Rank (*)	Number of themes surveyed	% „Luxembourg very suitable“	% „Lux. very suitable“, Ø all themes	„Luxembourg very suitable“, pop., mn (**)	
Average Europe	12	26	25%	24%	-	
	14	26	21%	23%	12,8	
	2	26	52%	26%	6,6	<ul style="list-style-type: none"> <li>• Italy, the Netherlands and Belgium rank highest in theme interest for hiking (see previous slide)</li> </ul>
	19	26	17%	22%	1,1	<ul style="list-style-type: none"> <li>• In addition, these countries also rank highest in the perceived theme competence of Luxembourg in regard of hiking.</li> </ul>
	16	26	19%	23%	1,2	
	2	26	49%	25%	4,1	
	15	26	18%	22%	8,5	
	10	26	23%	22%	11,3	
	10	31	28%	23%	12,1	
	23	31	20%	26%	6,8	
	6	10	24%	27%	6,7	Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.
	19	20	17%	27%	0,6	
	16	20	19%	24%	0,8	(*) Rank among all surveyed themes in respective source markets.
	15	20	15%	21%	1,1	(**) Aged 18-75.
	12	20	29%	33%	2,9	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

## Hiking



(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	13	26	11	26
NLA	3	26	5	26
RS	16	26	12	26
SB	12	26	9	26
PS	16	26	17	26
LO	13	26	11	26

- Nature-Loving Actives rank highest in both interest as well as perceiving Luxembourg as highly suitable for hiking. However, Luxembourg's rank for theme suitability is lower than that for general theme interest in this core target segment, still revealing some awareness deficit of our destination. Perfection Seekers rank lowest in both categories.



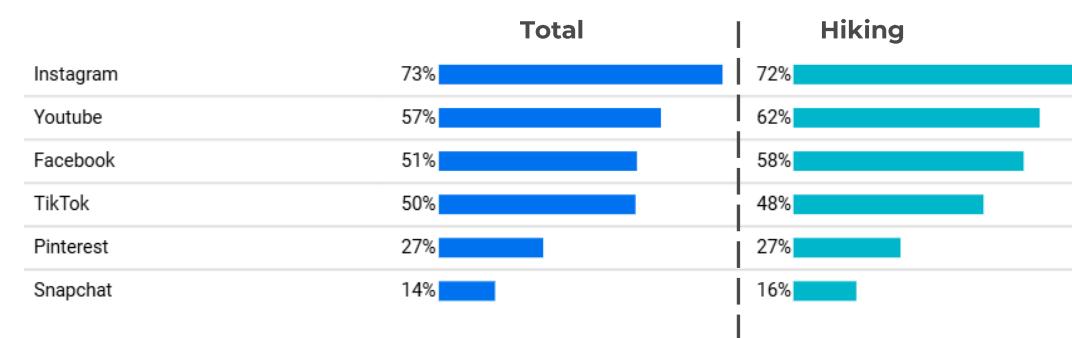
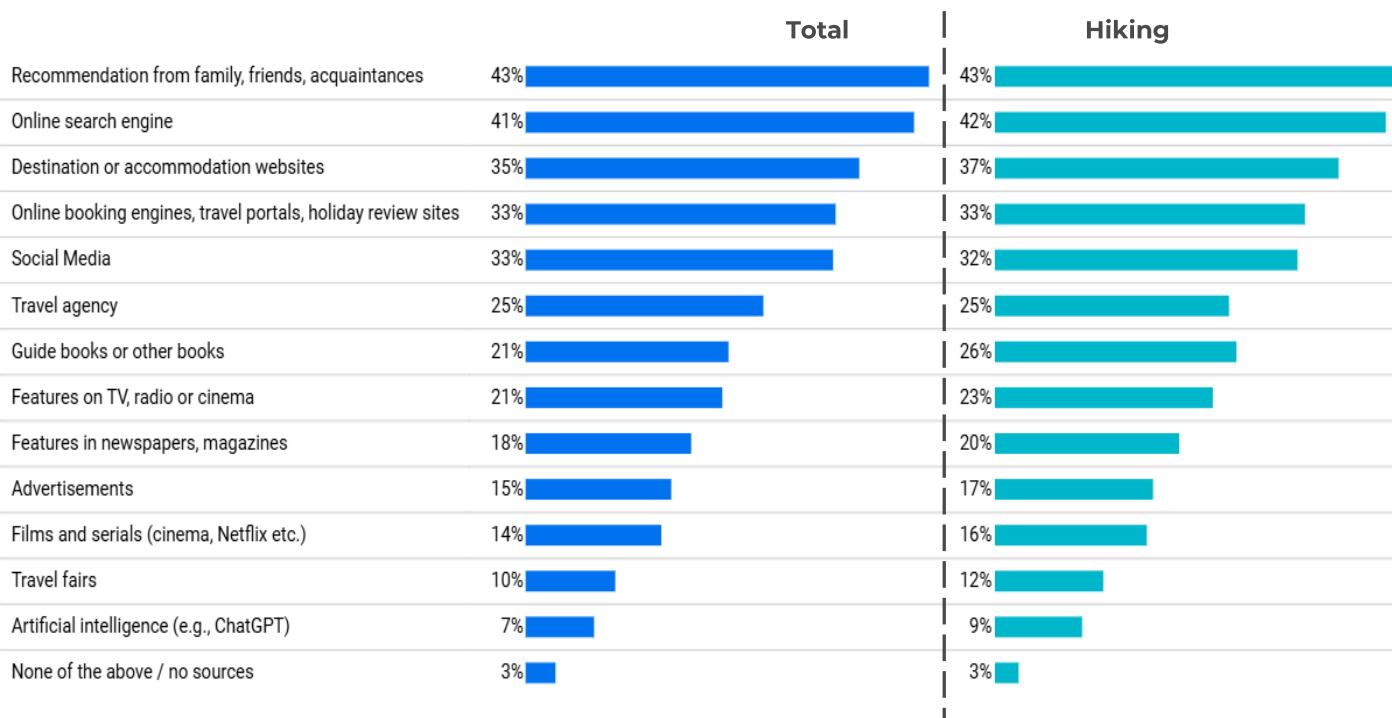
# **Trip organisation and preferences of Hiking segment**



# Trip organisation and preferences (1)

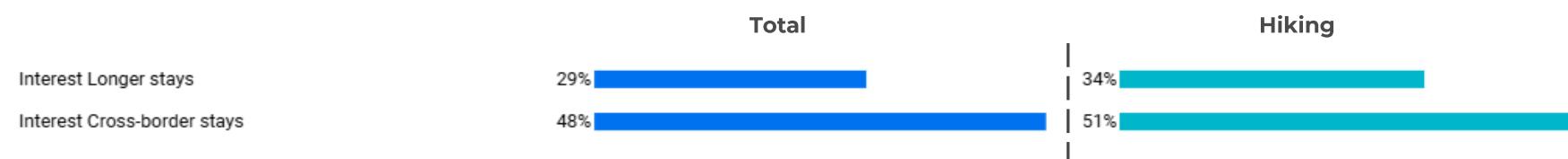
— Average European source markets, total vs. travellers interested in hiking

## Preferred sources of travel inspiration



- Sources of travel inspirations show no major differences between hiking visitors and overall visitors with hiking visitors just being a little more inspired by books. YouTube and Facebook are more relevant for hiking visitors in finding travel inspirations.
- Hiking visitors show slightly more interest in both longer stays as well as cross-border stays than overall visitors.

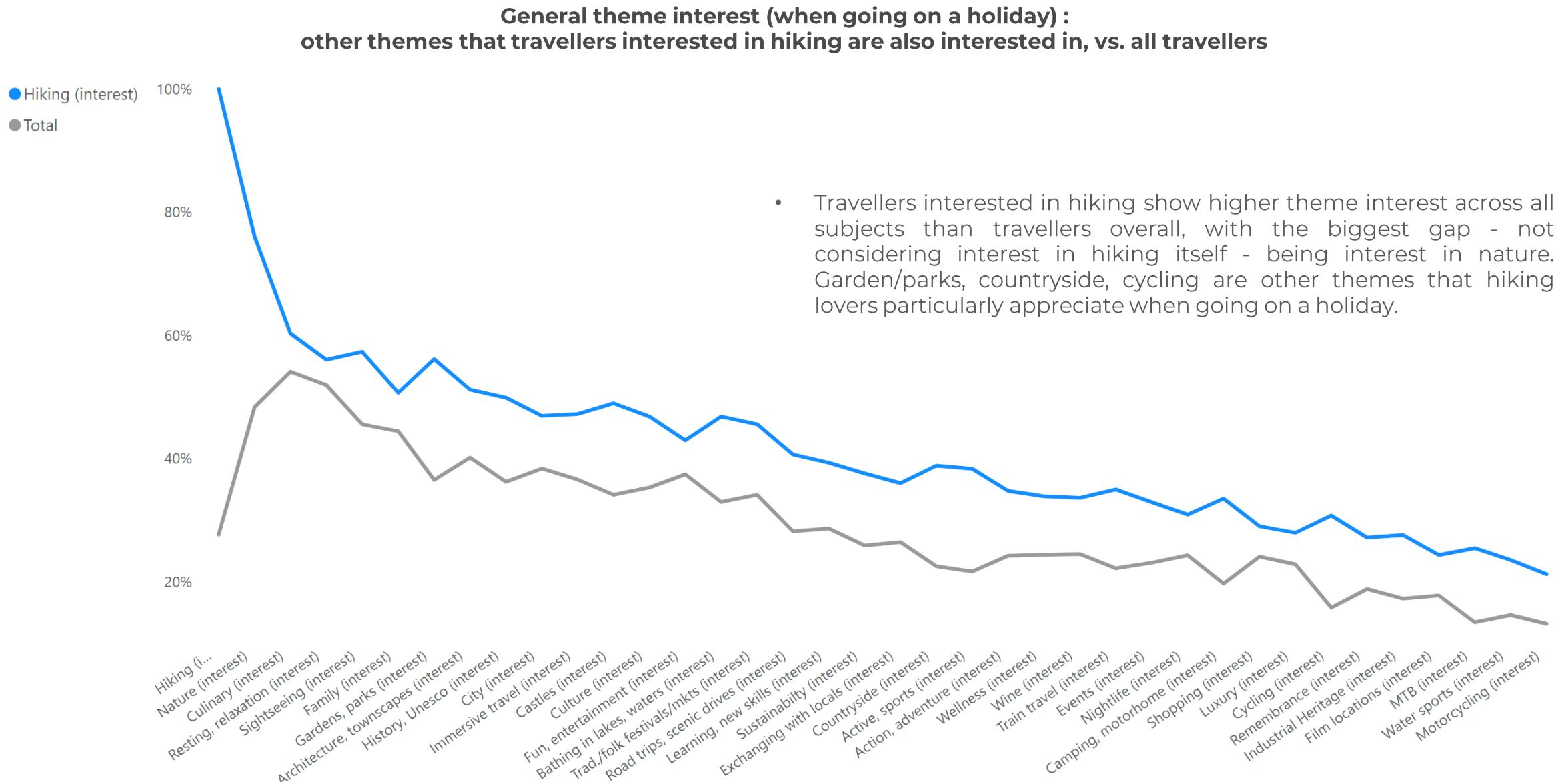
## Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent)



# Trip organisation and preferences (2)



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

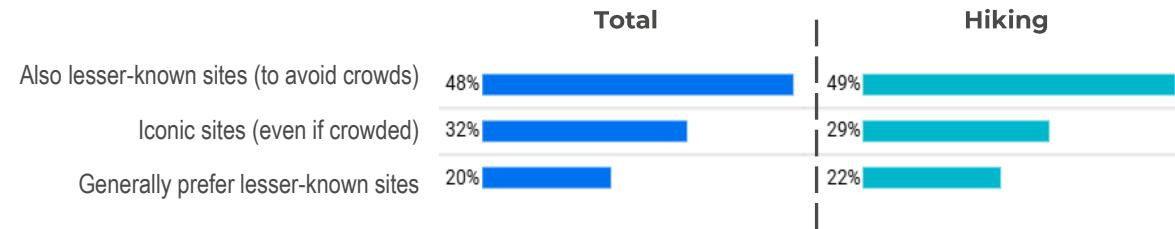




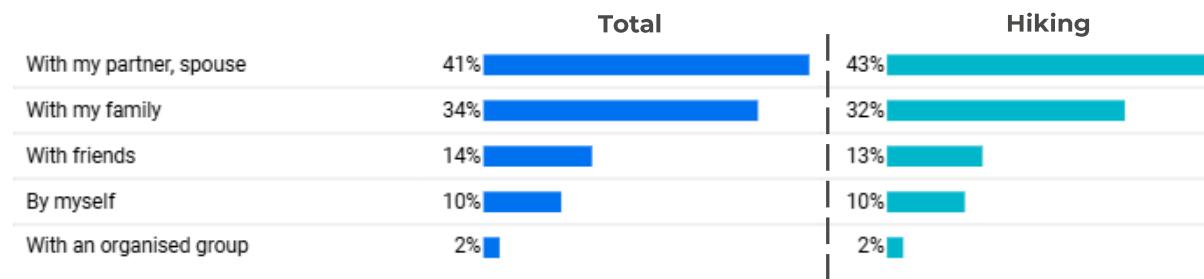
# Trip organisation and preferences (3)

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

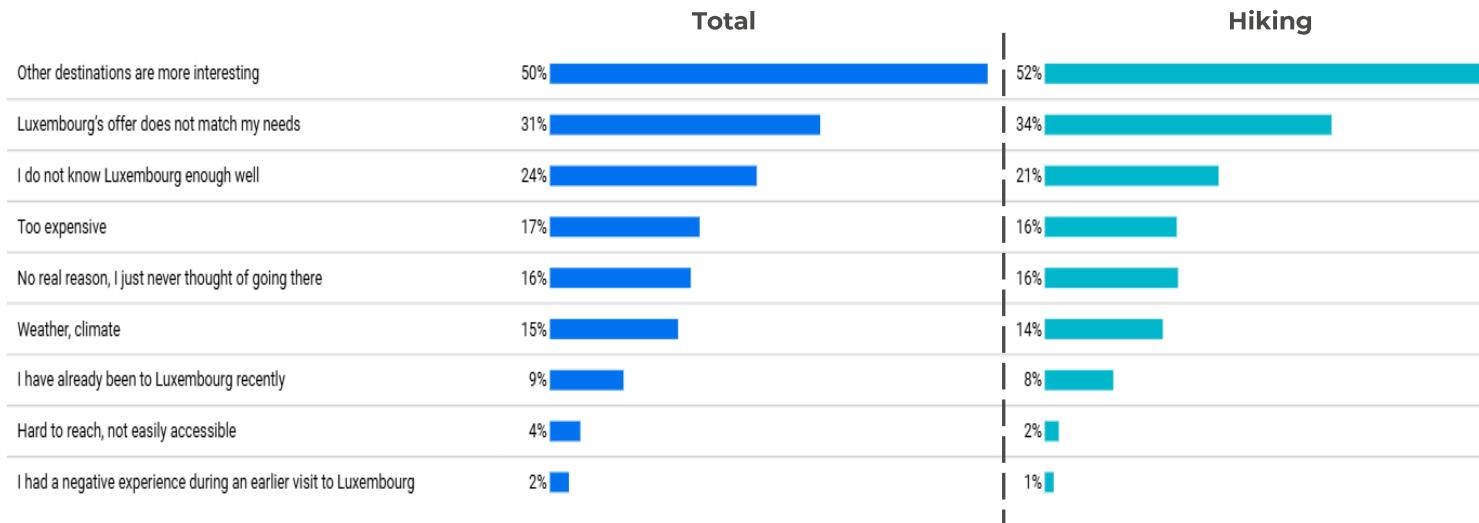
## General preference for visiting iconic vs. lesser-known sites



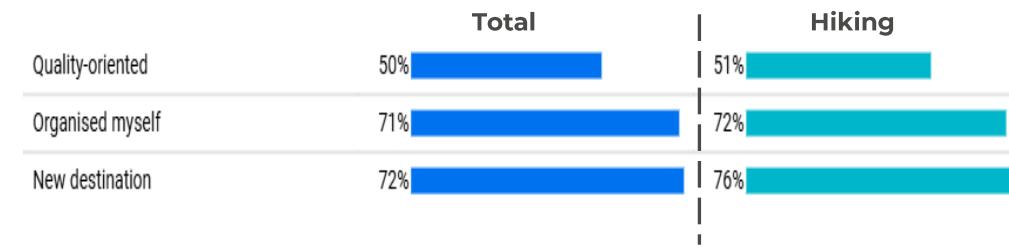
## Travel party (\*)



## Reasons for not considering Luxembourg as a destination



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



- Overall, travellers interested in hiking show no major difference in comparison to overall travellers regarding the different aspects presented on this slide.

(\*) 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

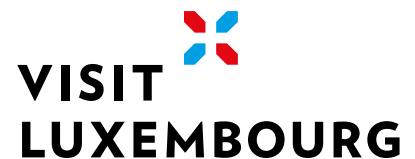


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