



Luxembourg for Tourism

Theme profile

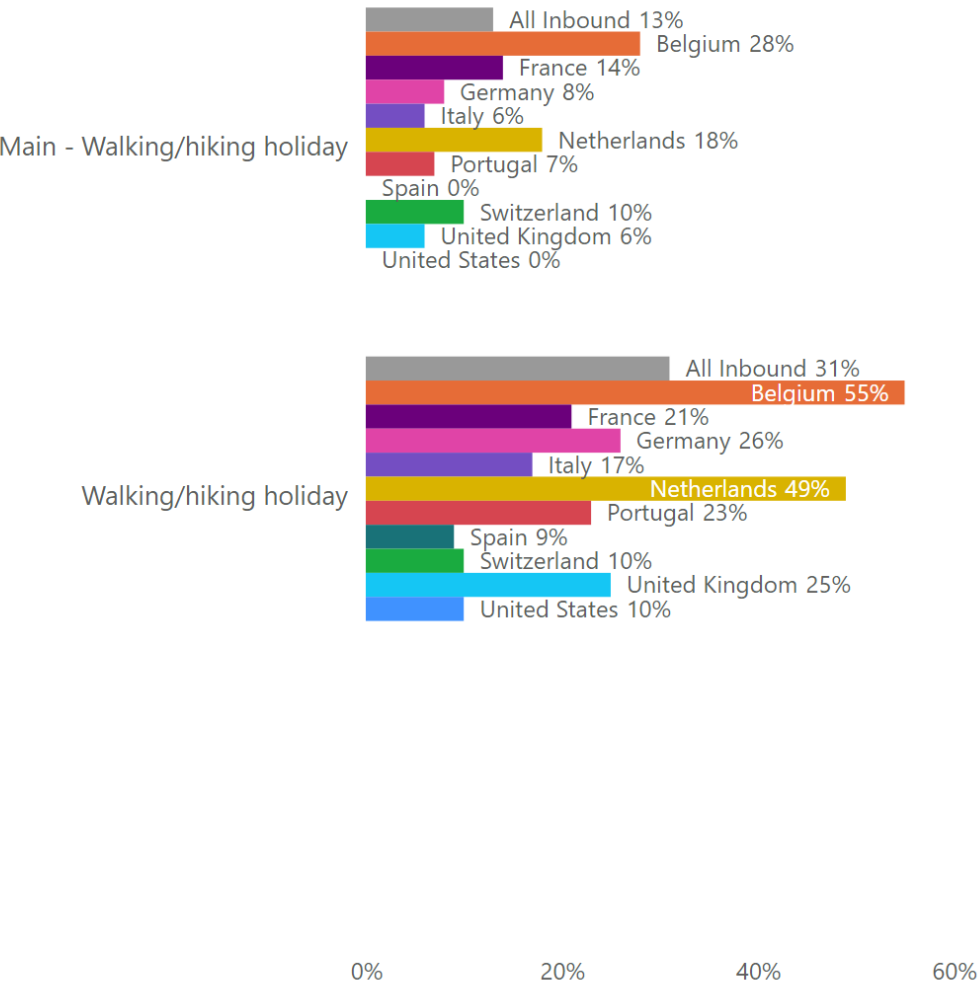
HIKING 2024



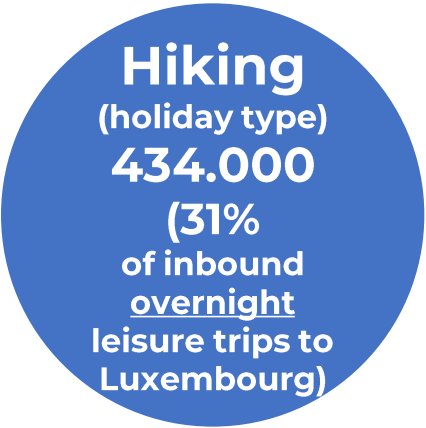
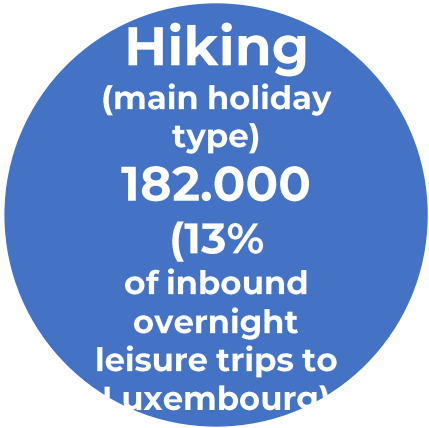
Market size of Hiking segment

Shares by country of origin

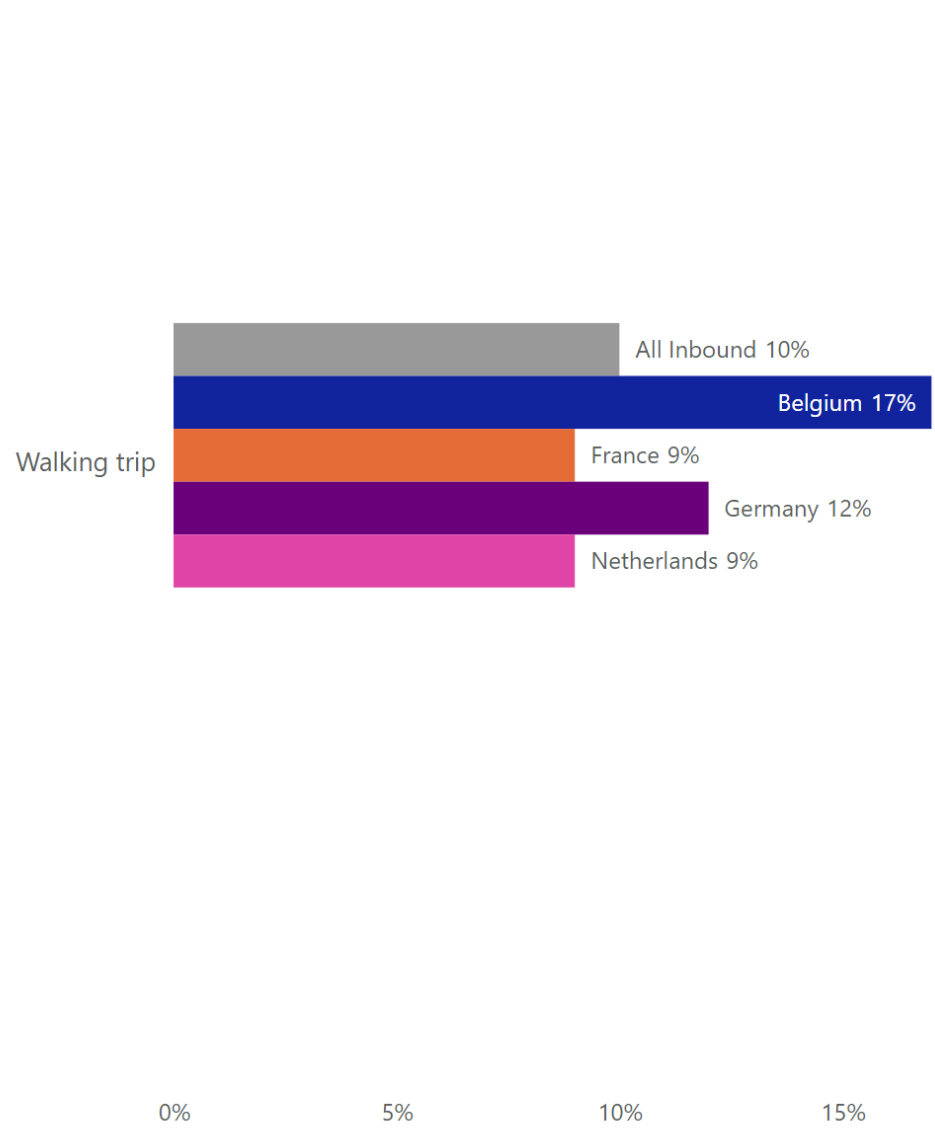
Visitors with overnight



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)

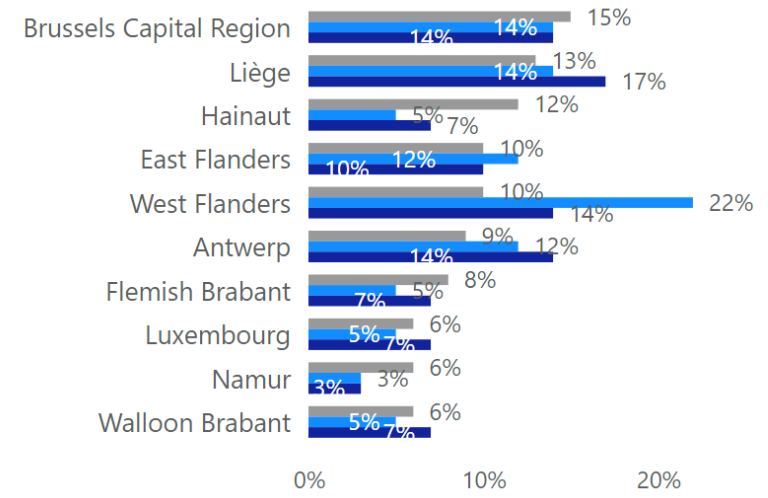


Sources: LFT/Ilres Visitor Survey, 2023-2024; trip volumes are estimates based on World Travel Monitor/IPK International, LFT/Ilres Visitor Survey & Editus/LFT mobile phone data.

Region of origin (BE)

Visitors with overnight

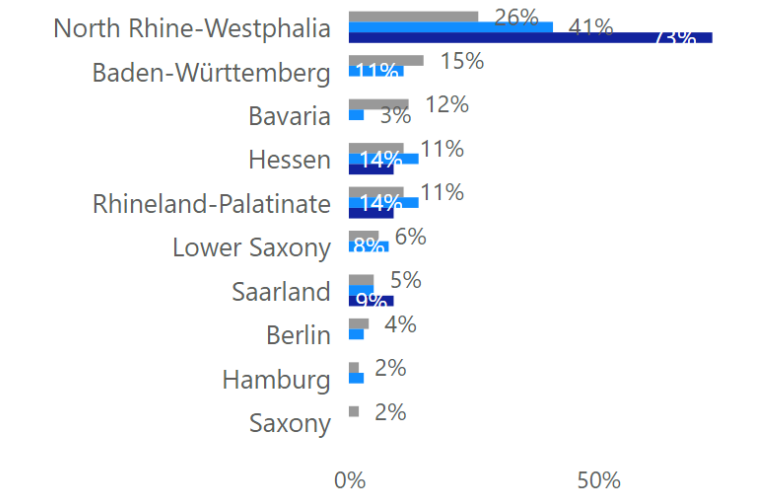
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Region of origin (DE)

Visitors with overnight

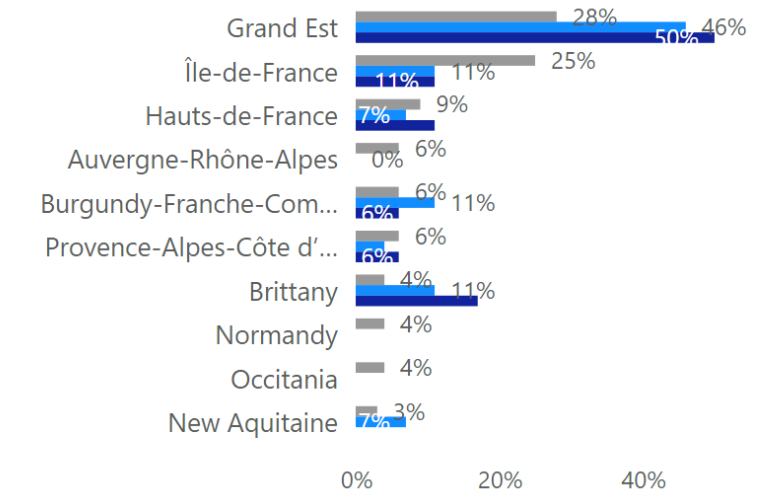
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Region of origin (FR)

Visitors with overnight

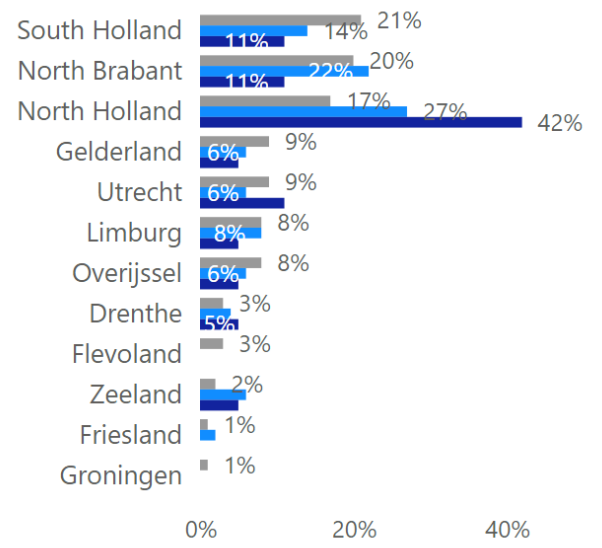
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Region of origin (NL)

Visitors with overnight

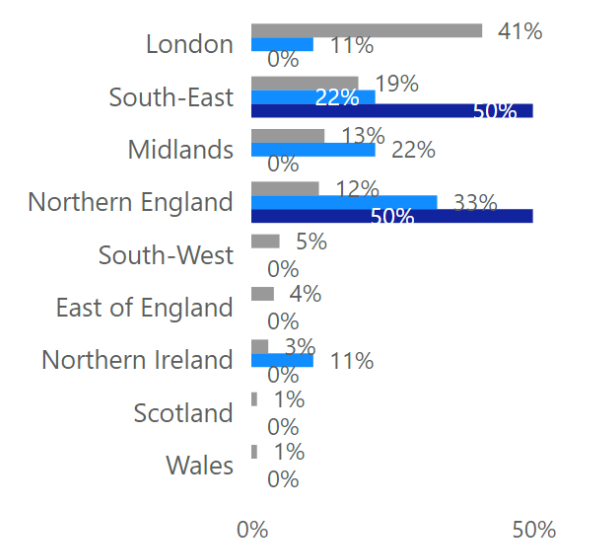
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Region of origin (UK)

Visitors with overnight

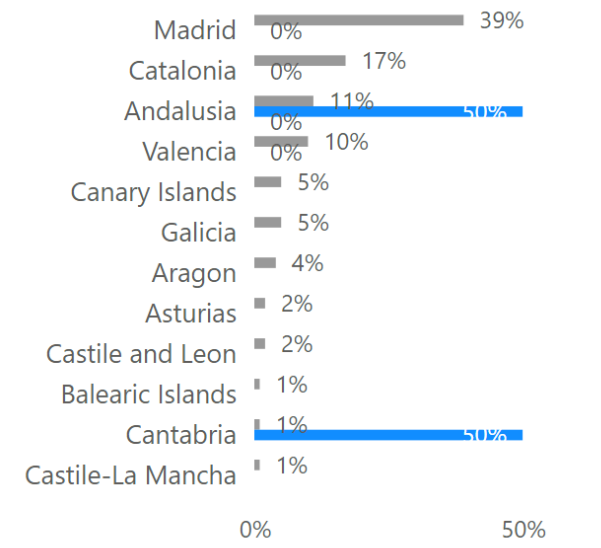
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Region of origin (ES)

Visitors with overnight

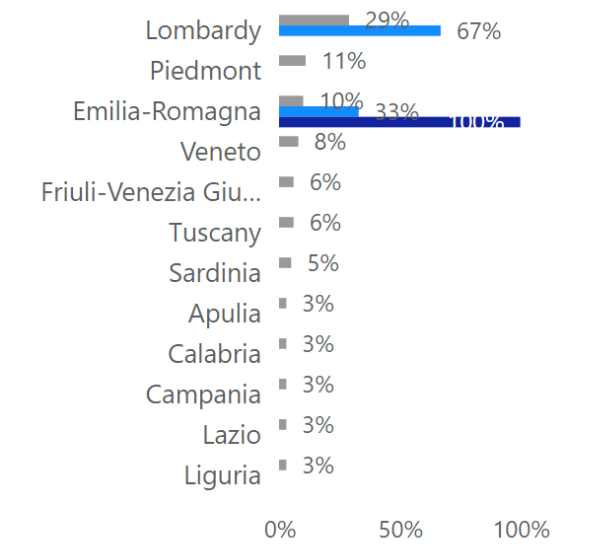
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Region of origin (IT)

Visitors with overnight

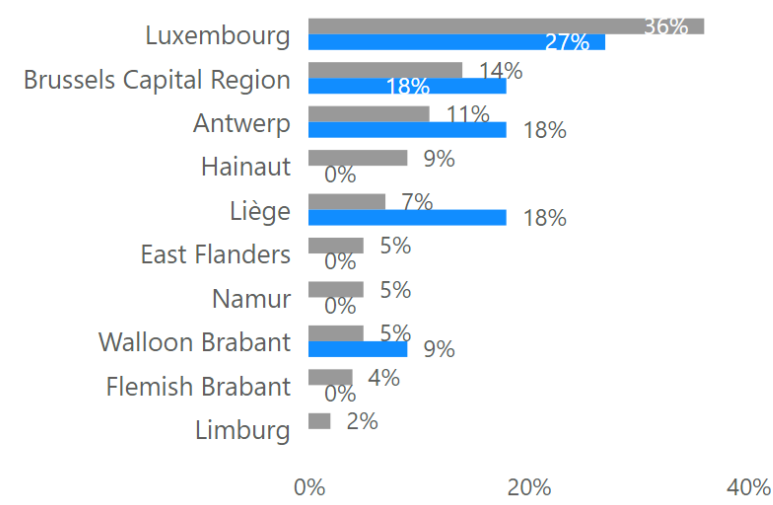
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Region of origin (BE)

Same-day visitors

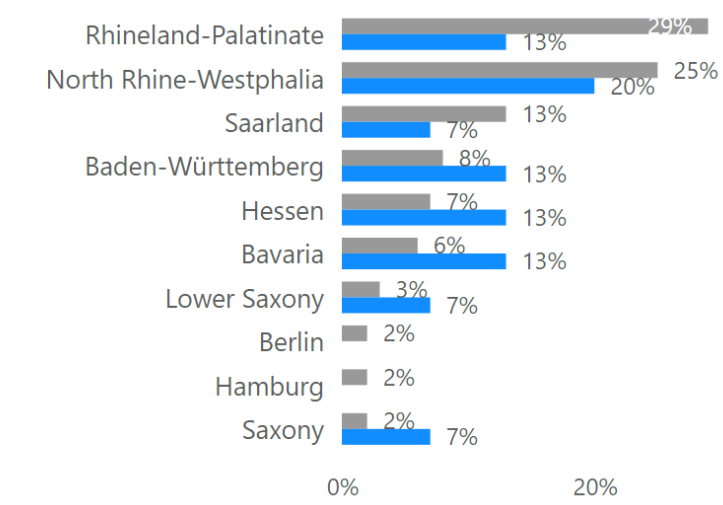
● All Inbound ● Hiking (excursion type)



Region of origin (DE)

Same-day visitors

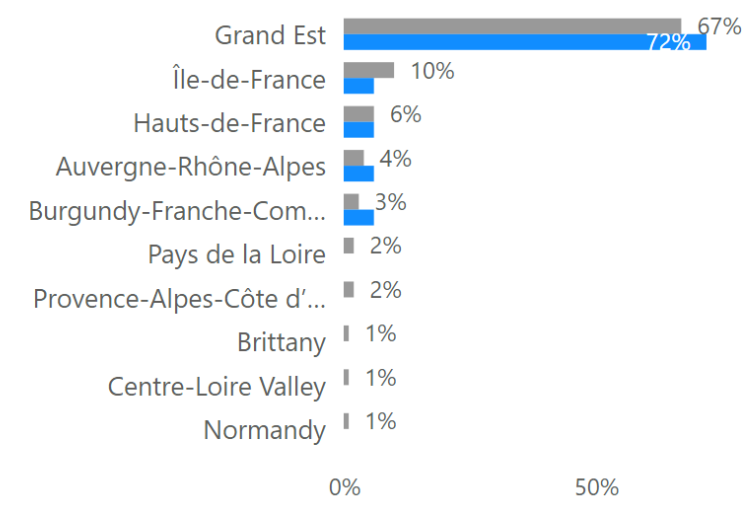
● All Inbound ● Hiking (excursion type)



Region of origin (FR)

Same-day visitors

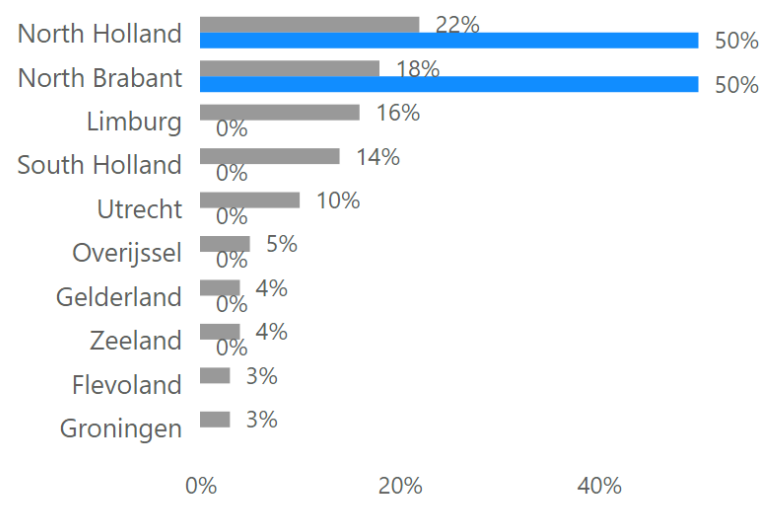
● All Inbound ● Hiking (excursion type)



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.

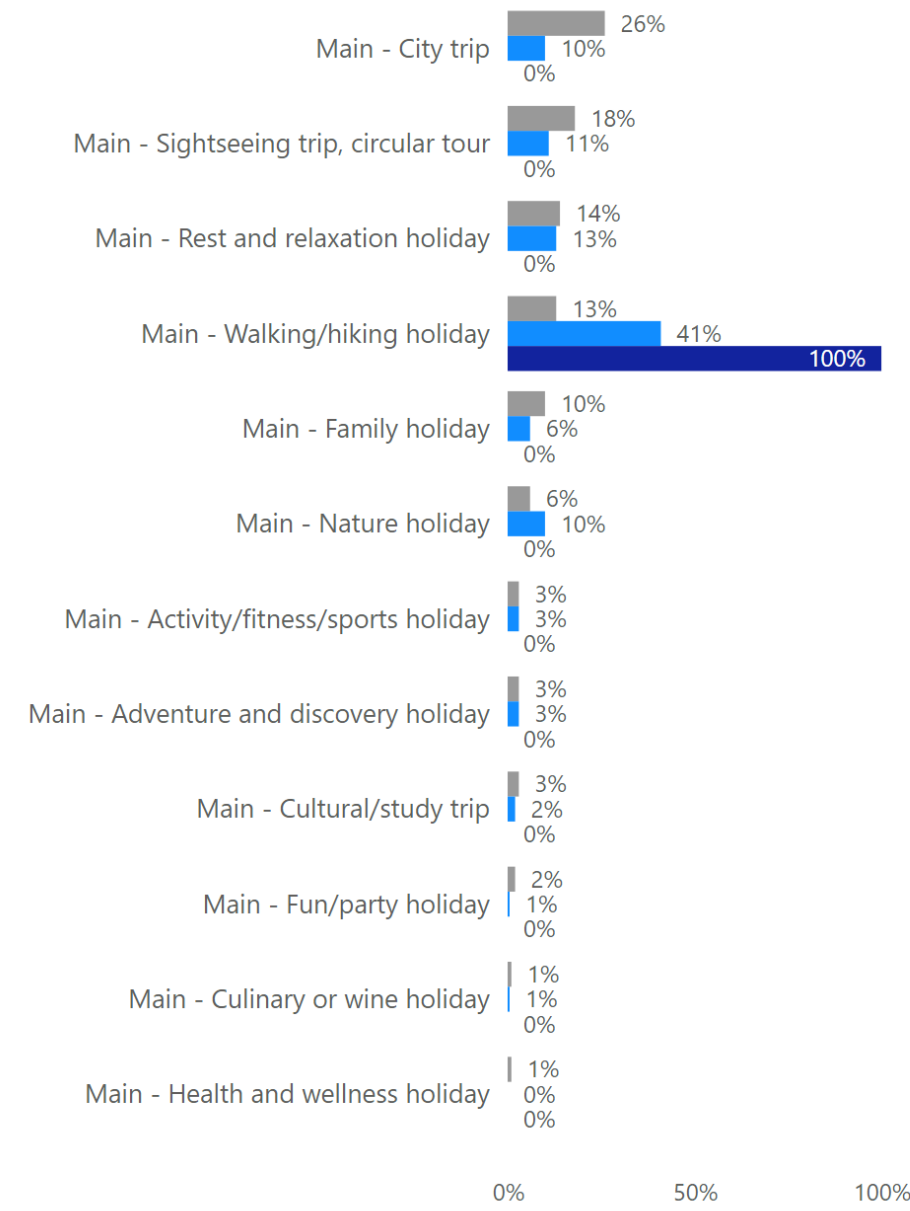


Travel behaviour of leisure visitors with Hiking as a holiday type / excursion in Luxembourg

Main holiday types

Visitors with overnight

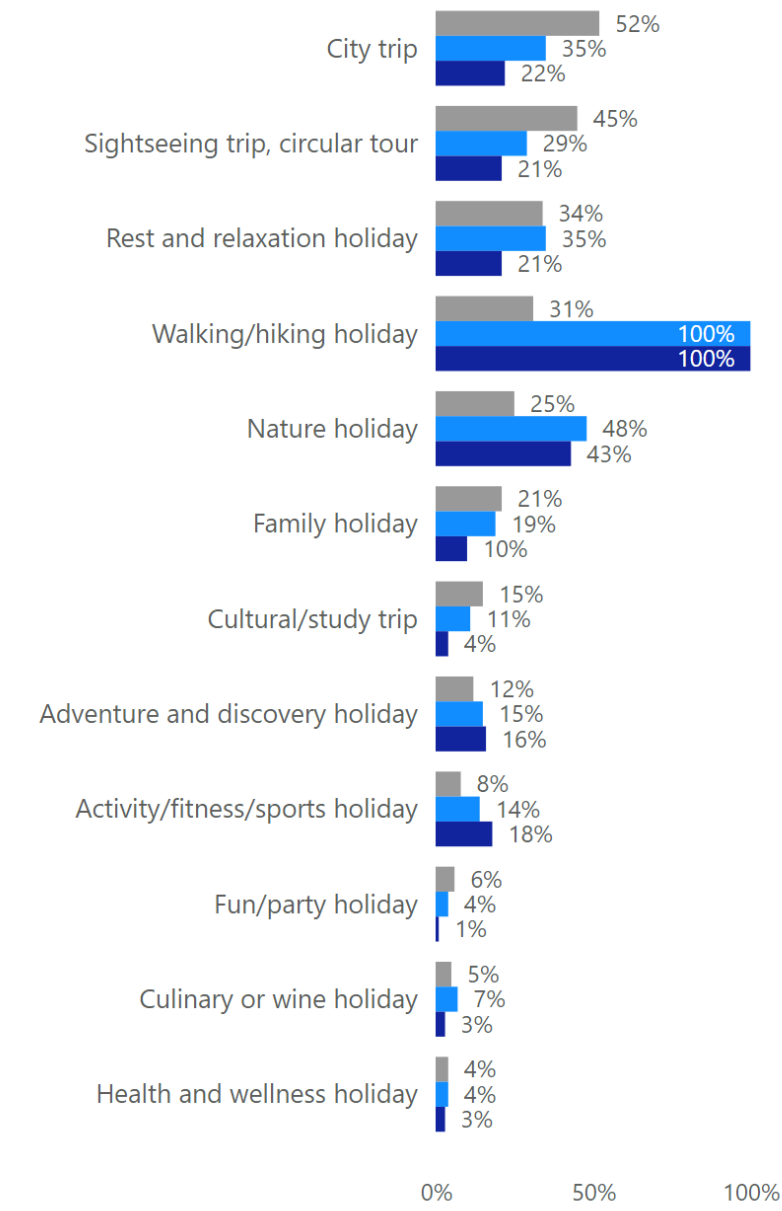
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



All holiday types

Visitors with overnight

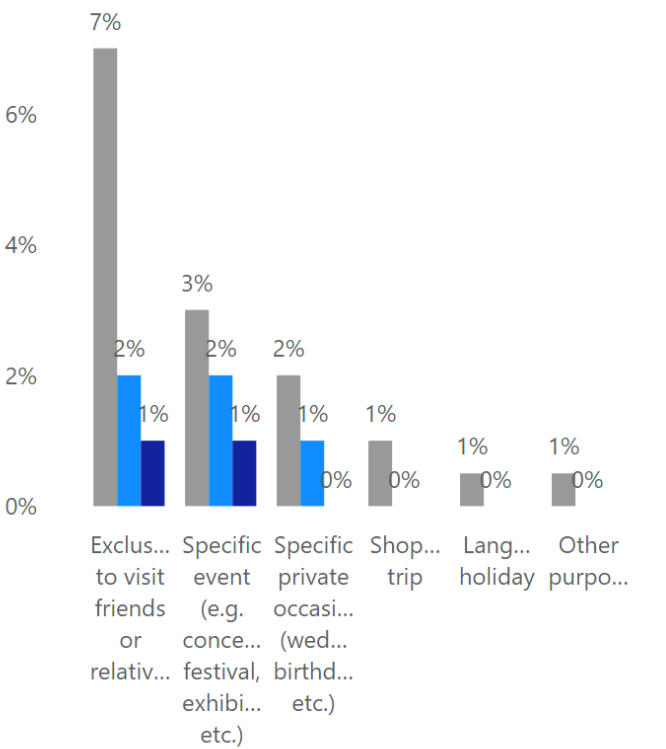
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



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

Main purpose of overnight trip (if not holiday)

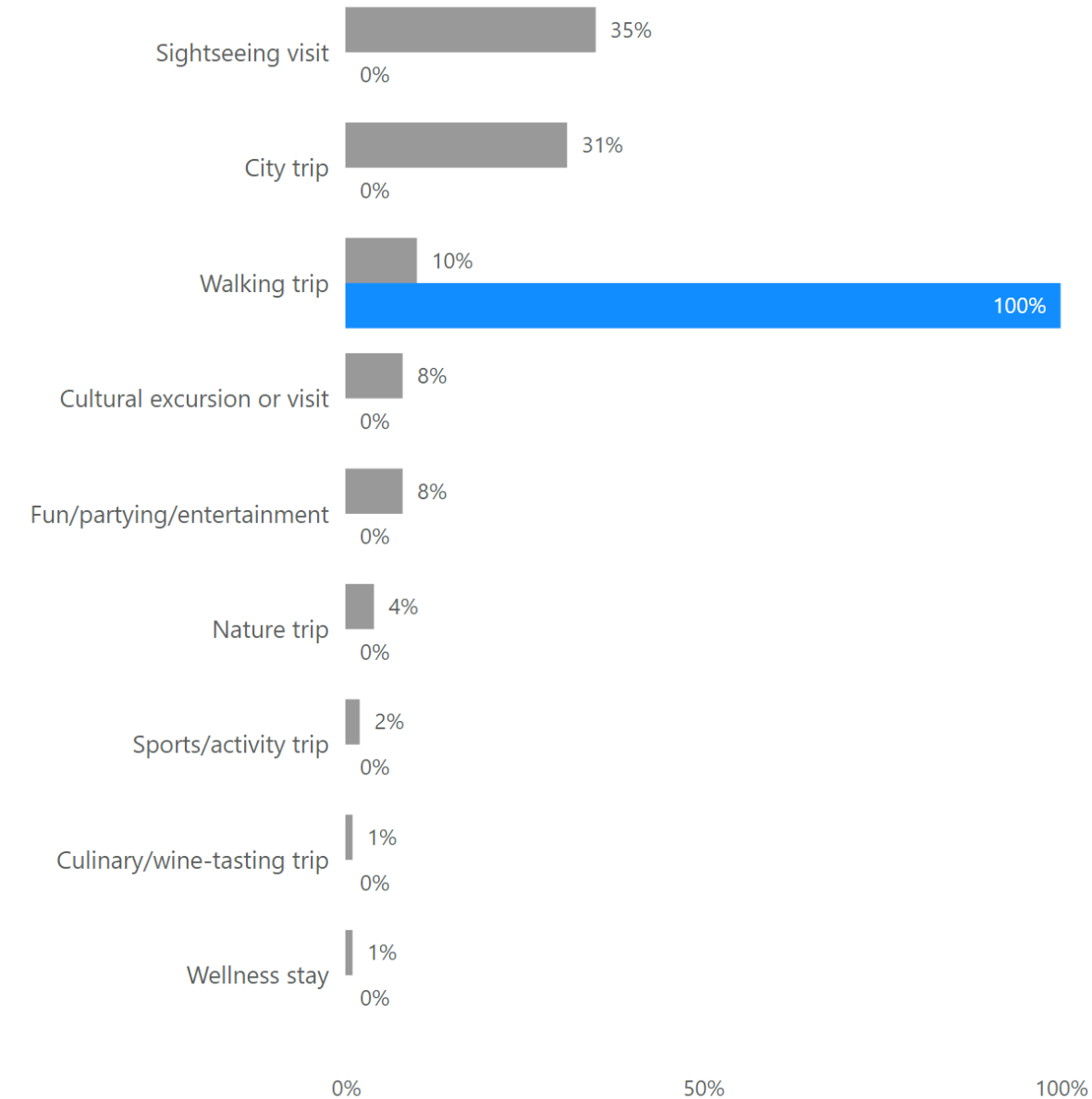
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Type of excursion

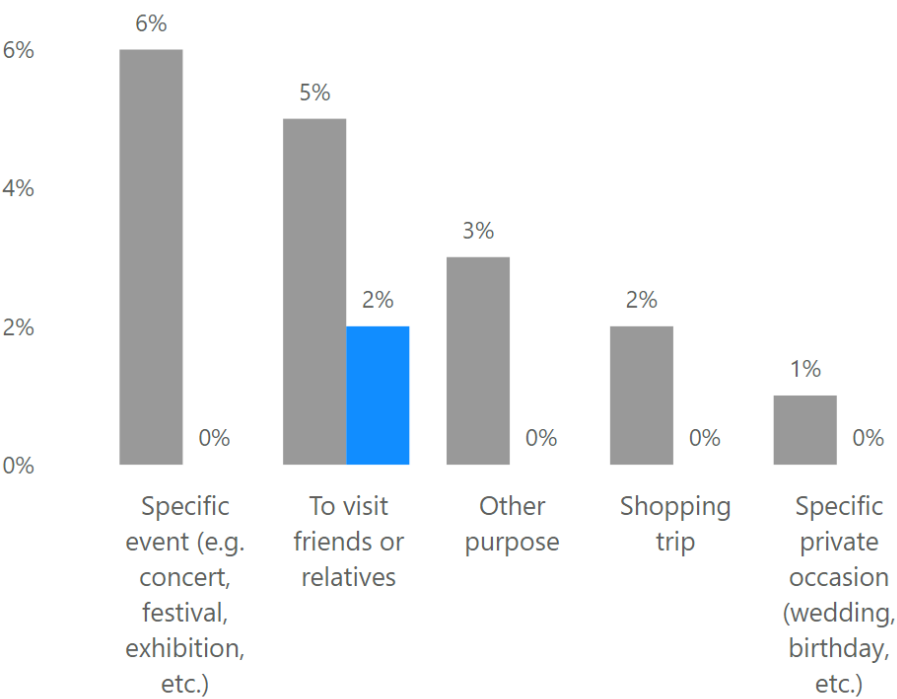
Same-day visitors

● All Inbound ● Hiking (excursion type)



Main purpose of excursion
(if not day trip)

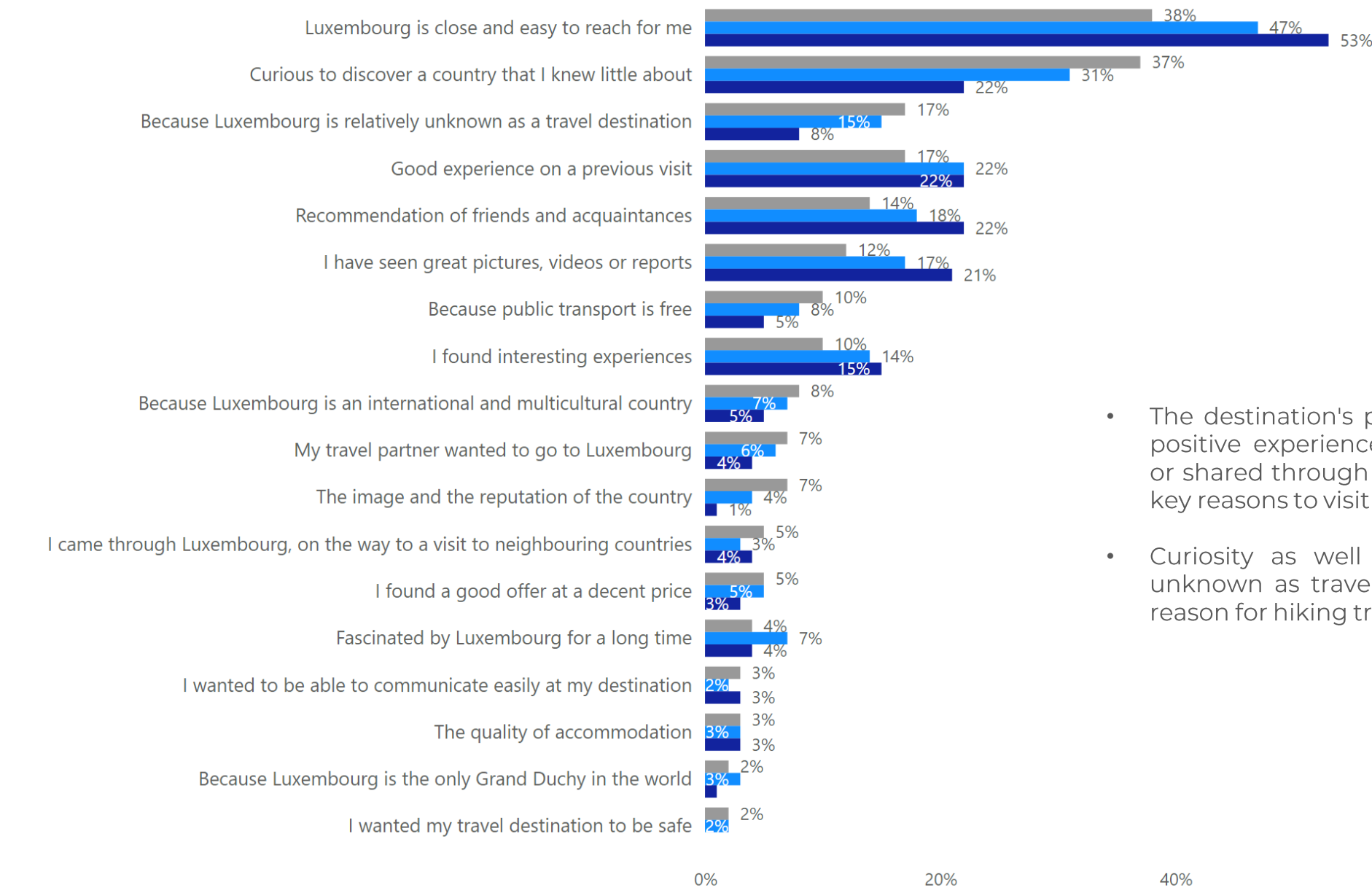
● All Inbound ● Hiking (excursion type)



Reasons for choosing Luxembourg

Visitors with overnight

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

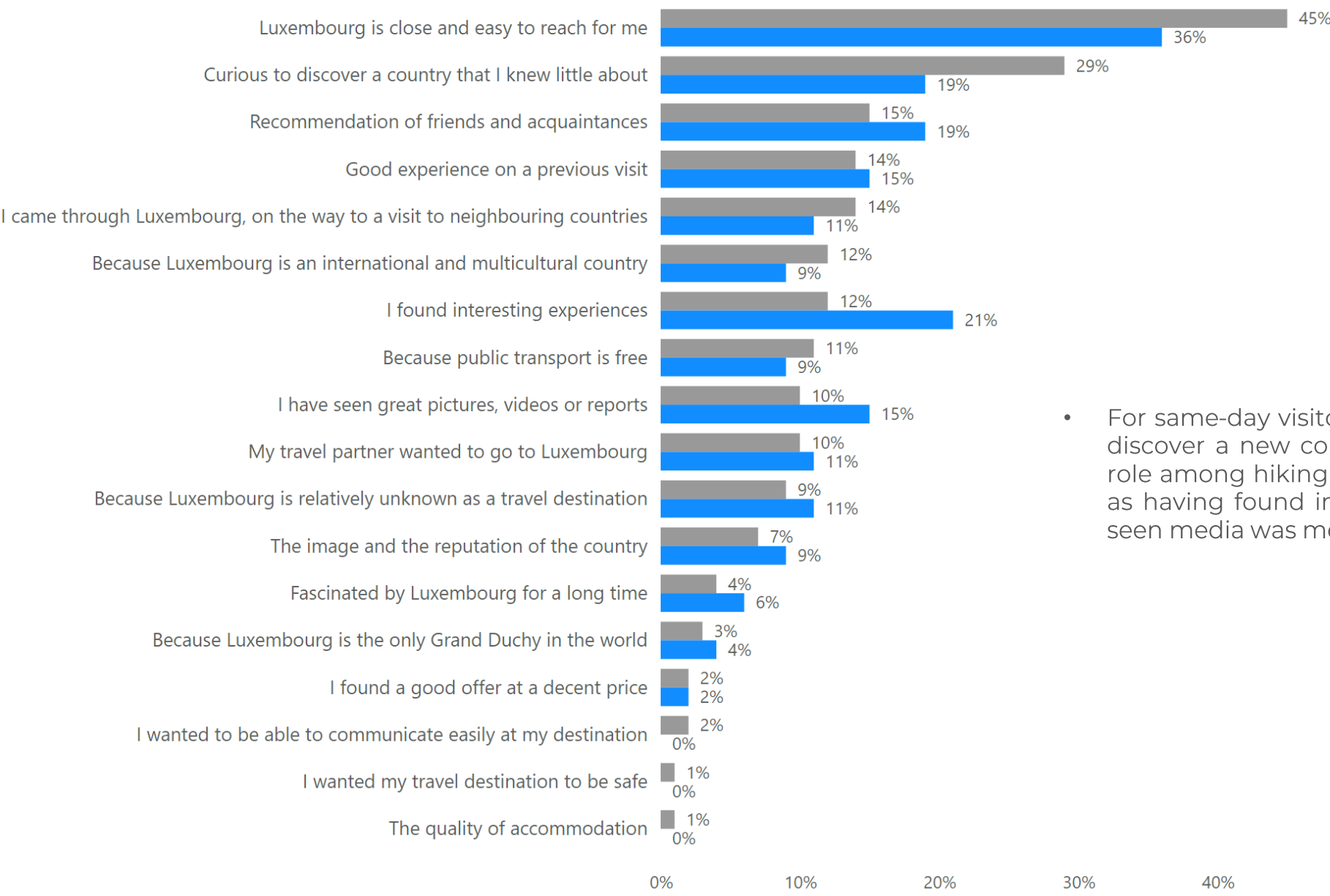


- The destination's proximity, combined with previous positive experiences—either personally encountered or shared through recommendations and media, are key reasons to visit Luxembourg for hiking visitors.
- Curiosity as well as Luxembourg being relatively unknown as travel destination are less frequently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

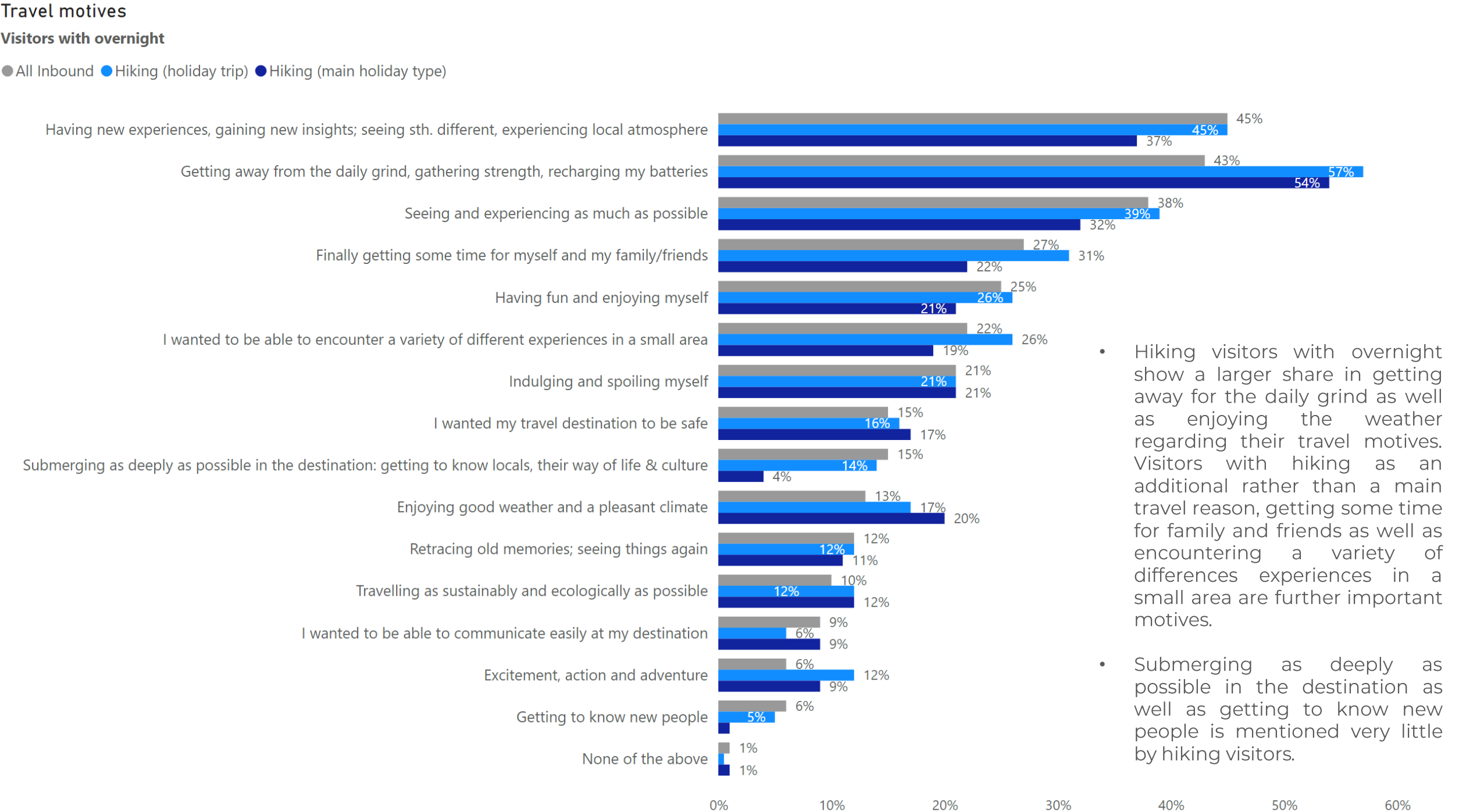
Reasons for choosing Luxembourg

Same-day visitors

● All Inbound ● Hiking (excursion type)



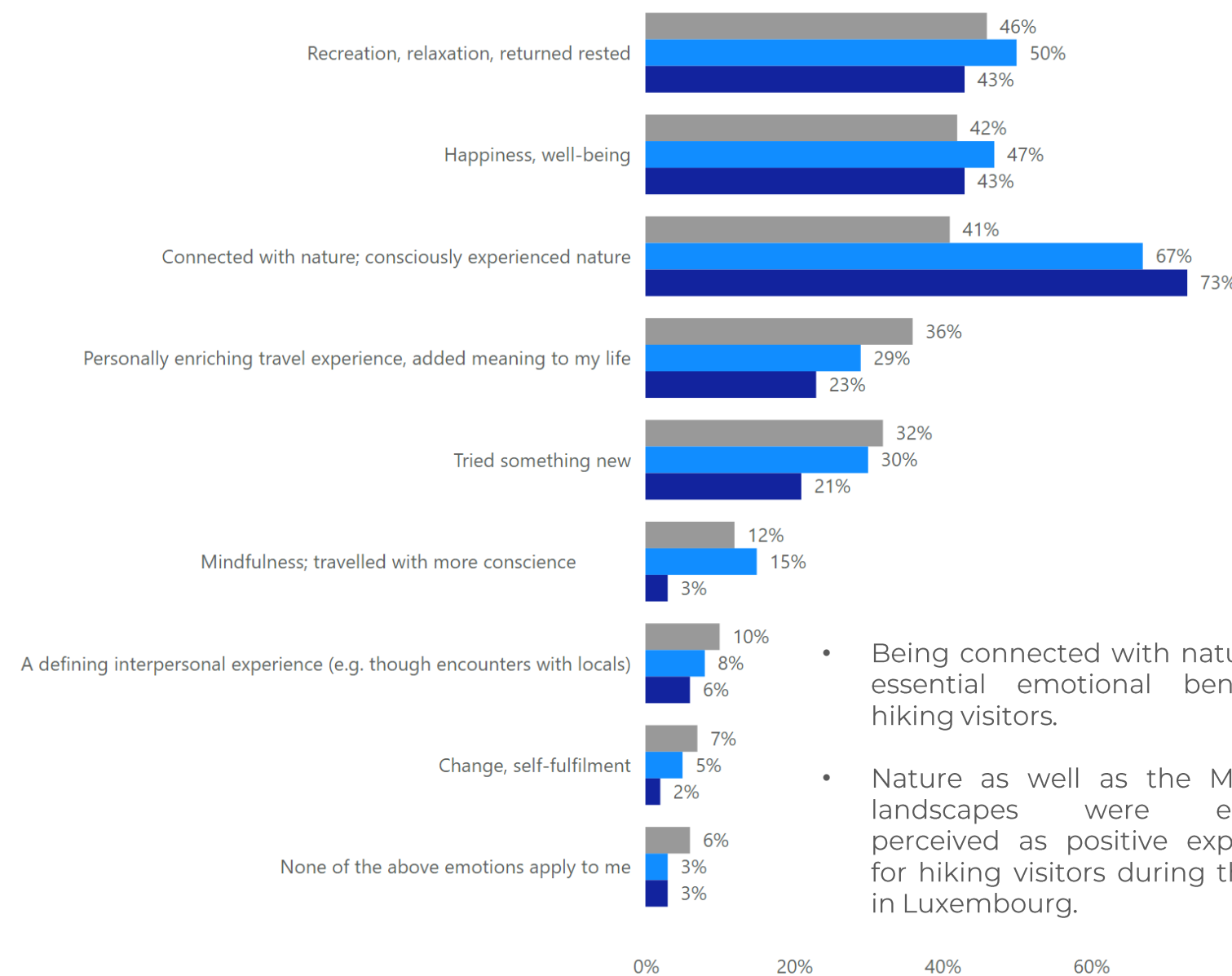
- For same-day visitors proximity as well as curiosity to discover a new country seems to play less of a key-role among hiking visitors. Recommendation as well as having found interesting experiences and having seen media was mentioned more often.



Emotional benefits experienced during stay

Visitors with overnight

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

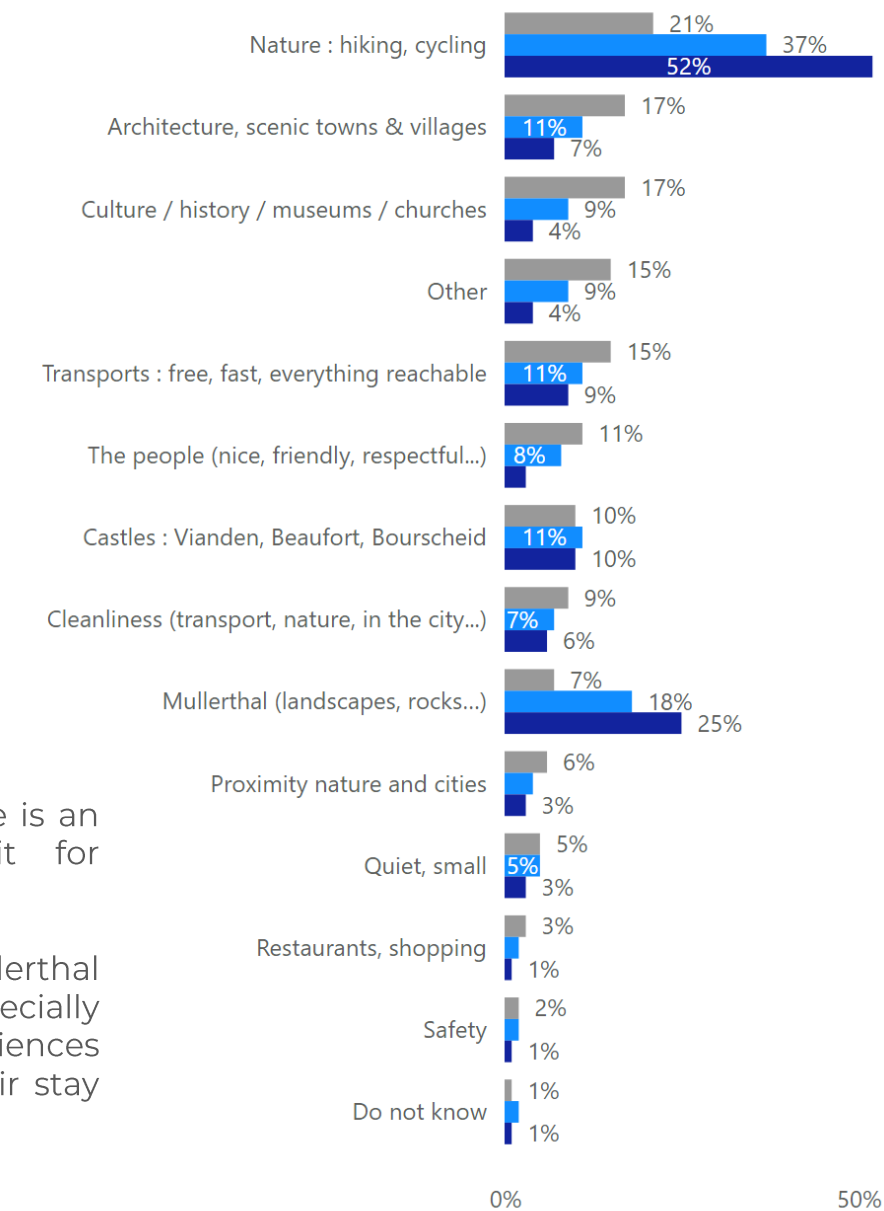


- Being connected with nature is an essential emotional benefit for hiking visitors.
- Nature as well as the Müllerthal landscapes were especially perceived as positive experiences for hiking visitors during their stay in Luxembourg.

Particularly positive experience during stay (open question)

Visitors with overnight

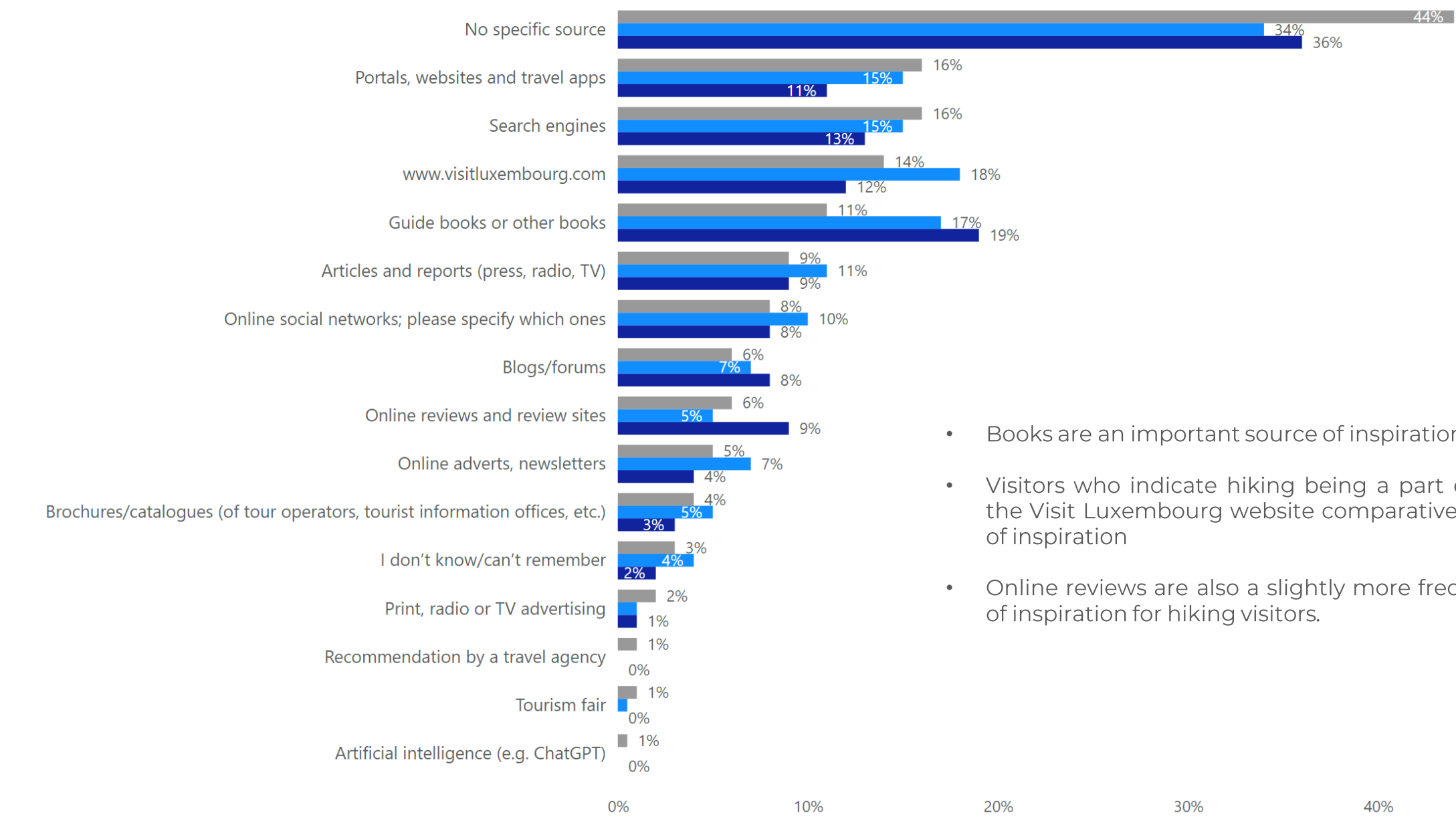
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Inspiration sources

Visitors with overnight

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

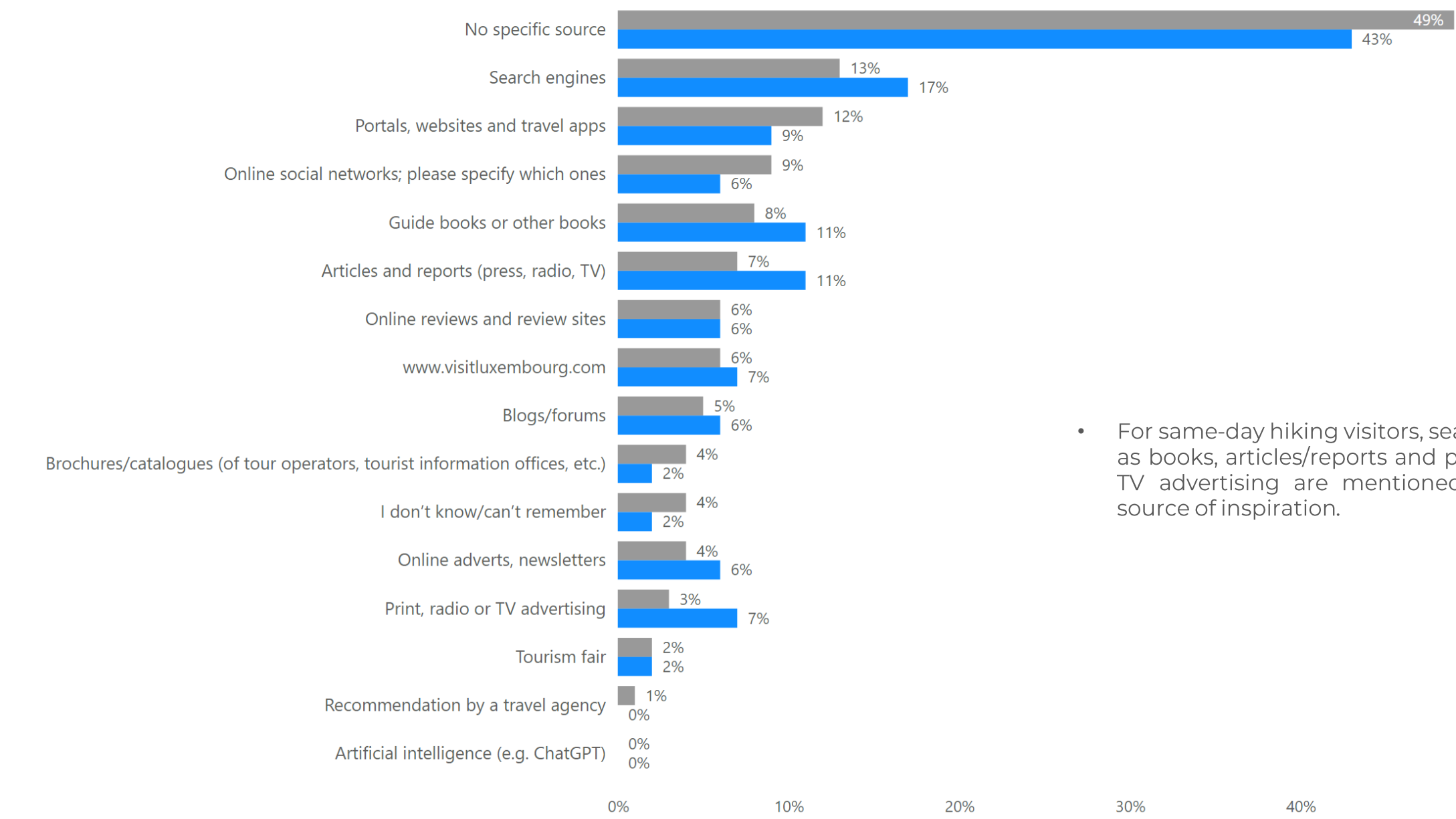


- Books are an important source of inspiration for hiking visitors.
- Visitors who indicate hiking being a part of their holiday use the Visit Luxembourg website comparatively more as a source of inspiration
- Online reviews are also a slightly more frequently used source of inspiration for hiking visitors.

Inspiration sources

Same-day visitors

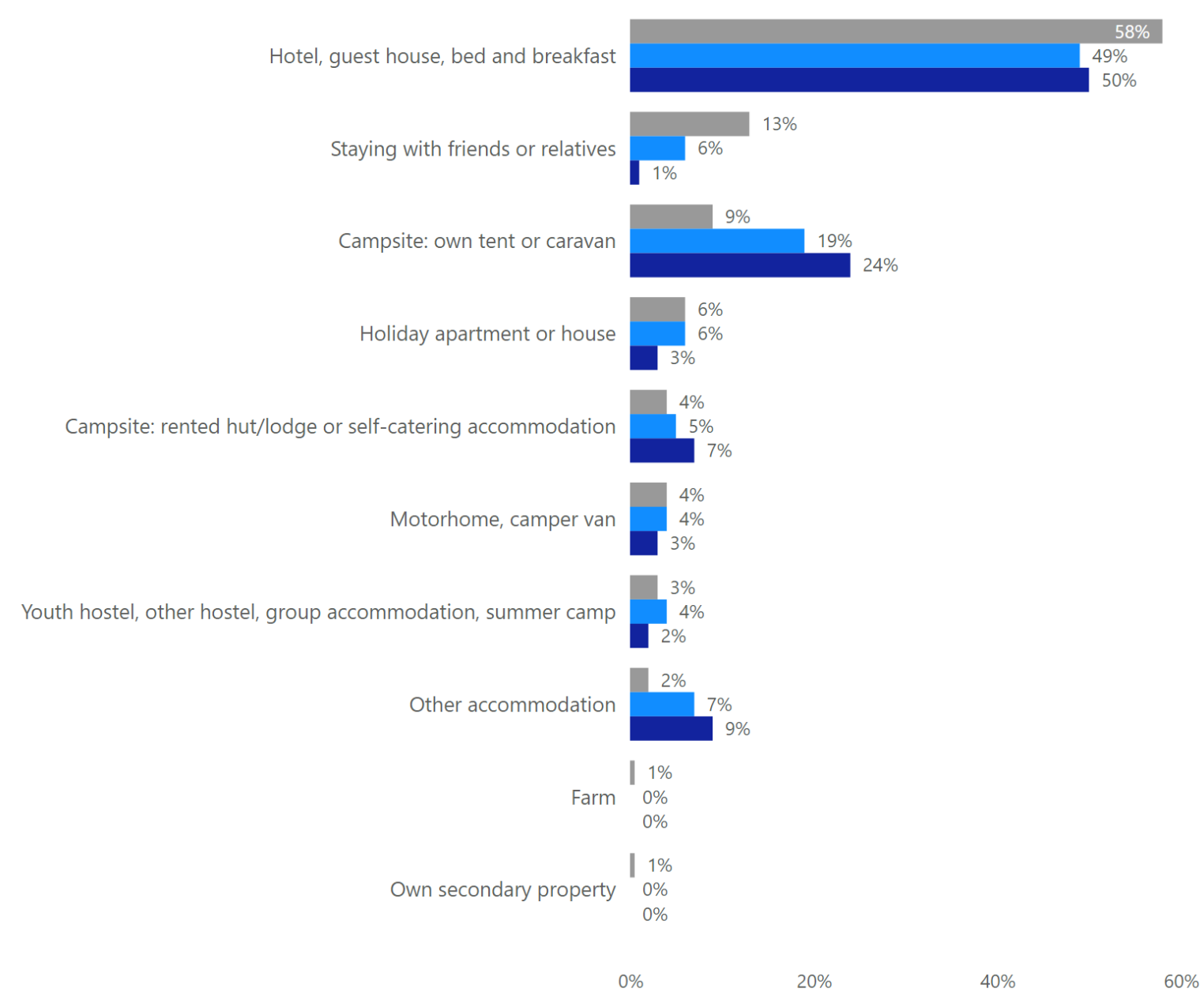
● All Inbound ● Hiking (excursion type)



- 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)

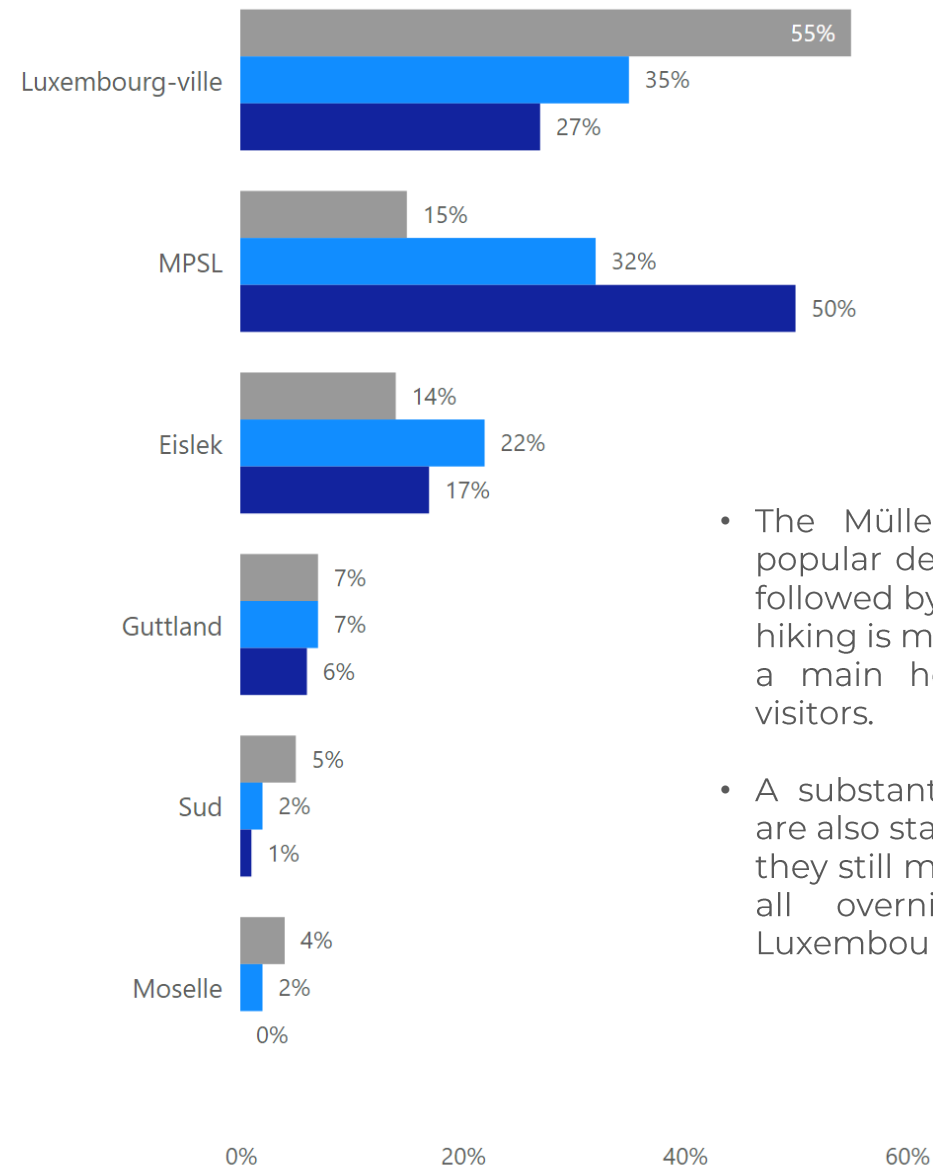


- Hiking visitors tend to stay less in hotels and more often on campsites during their visits.

Destination region

Visitors with overnight

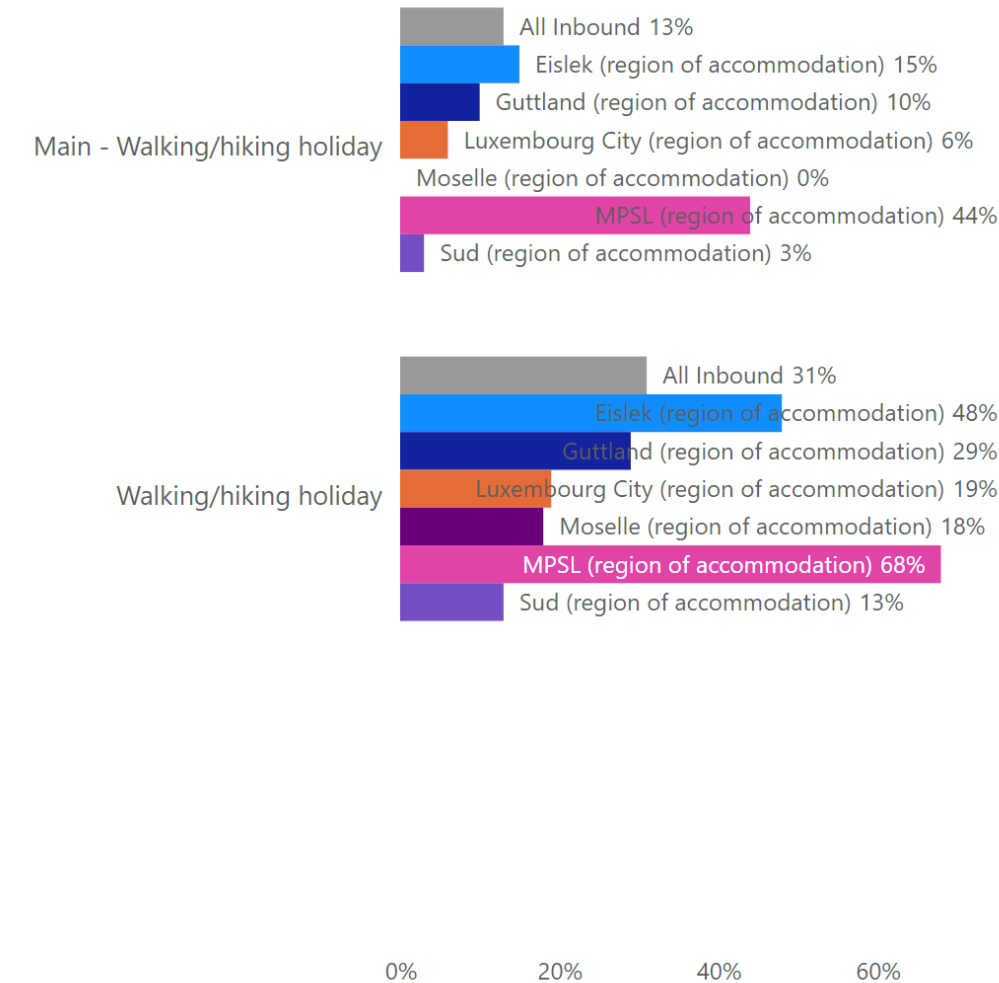
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



- 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.

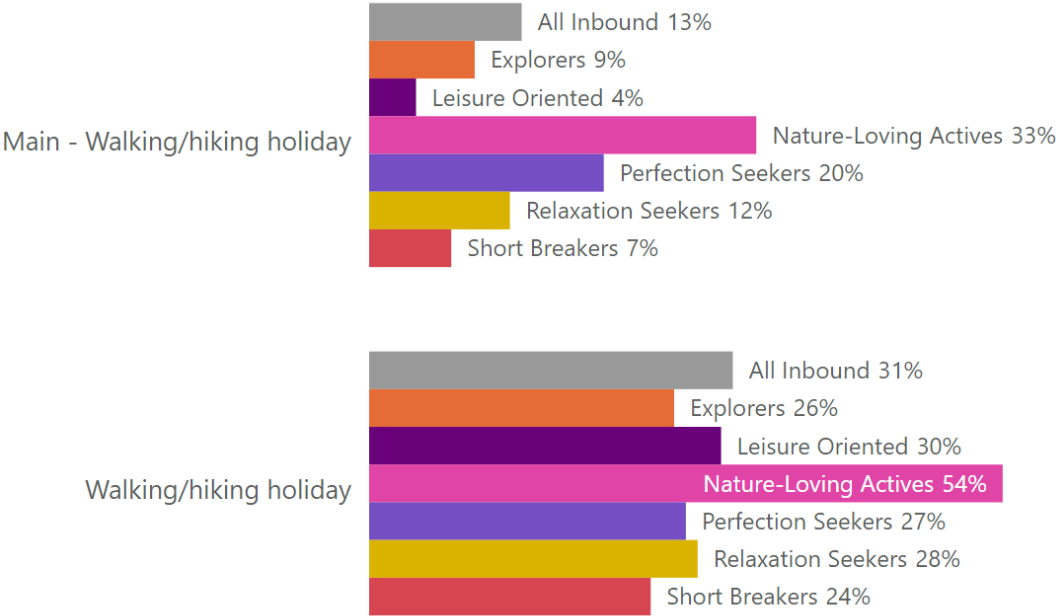
Shares by destination region

Visitors with overnight



Shares by target segments

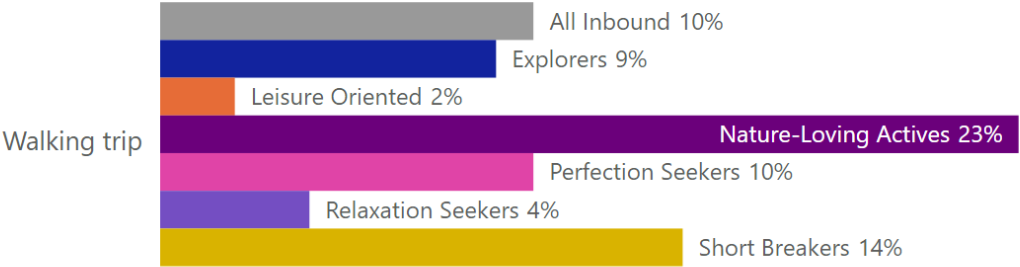
Visitors with overnight



Shares by target segments

Same-day visitors

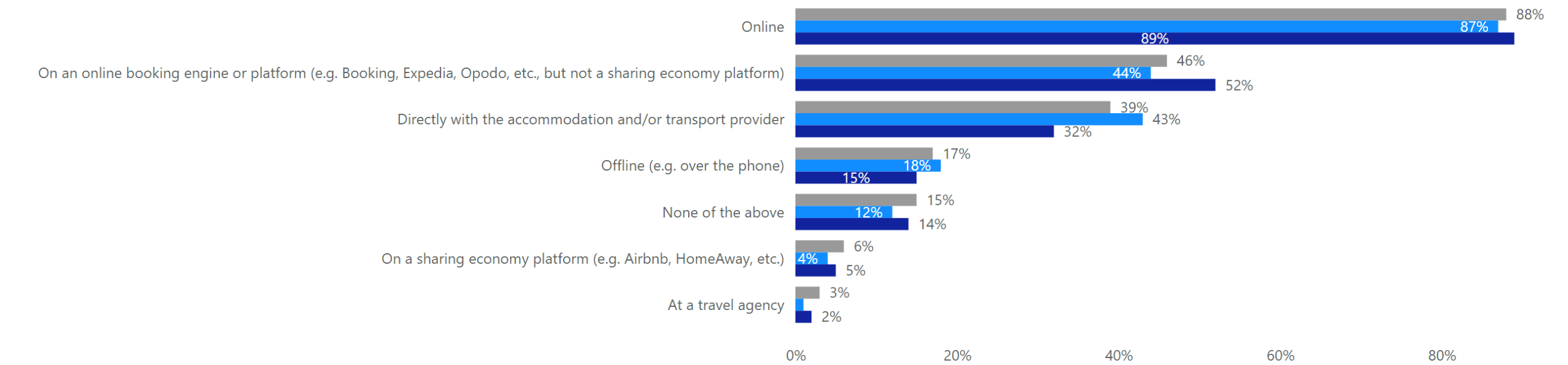
- Without surprise, Nature-Loving Actives are dominant among hiking visitors, both for visitors with overnight as well as same-day visitors.



Booking channels

Visitors with overnight

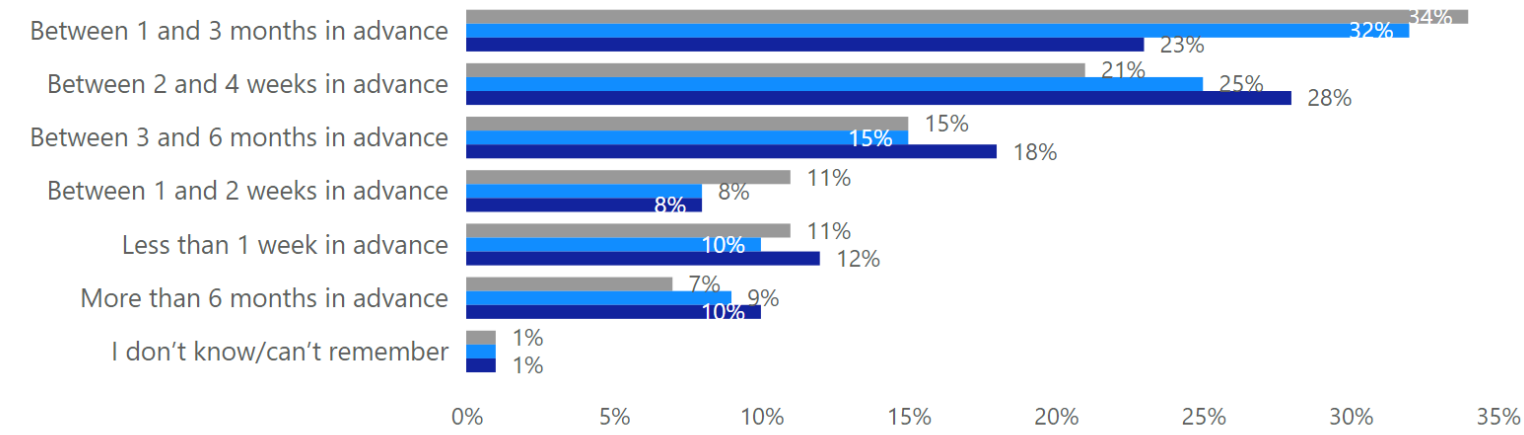
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Decision moment

Visitors with overnight

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

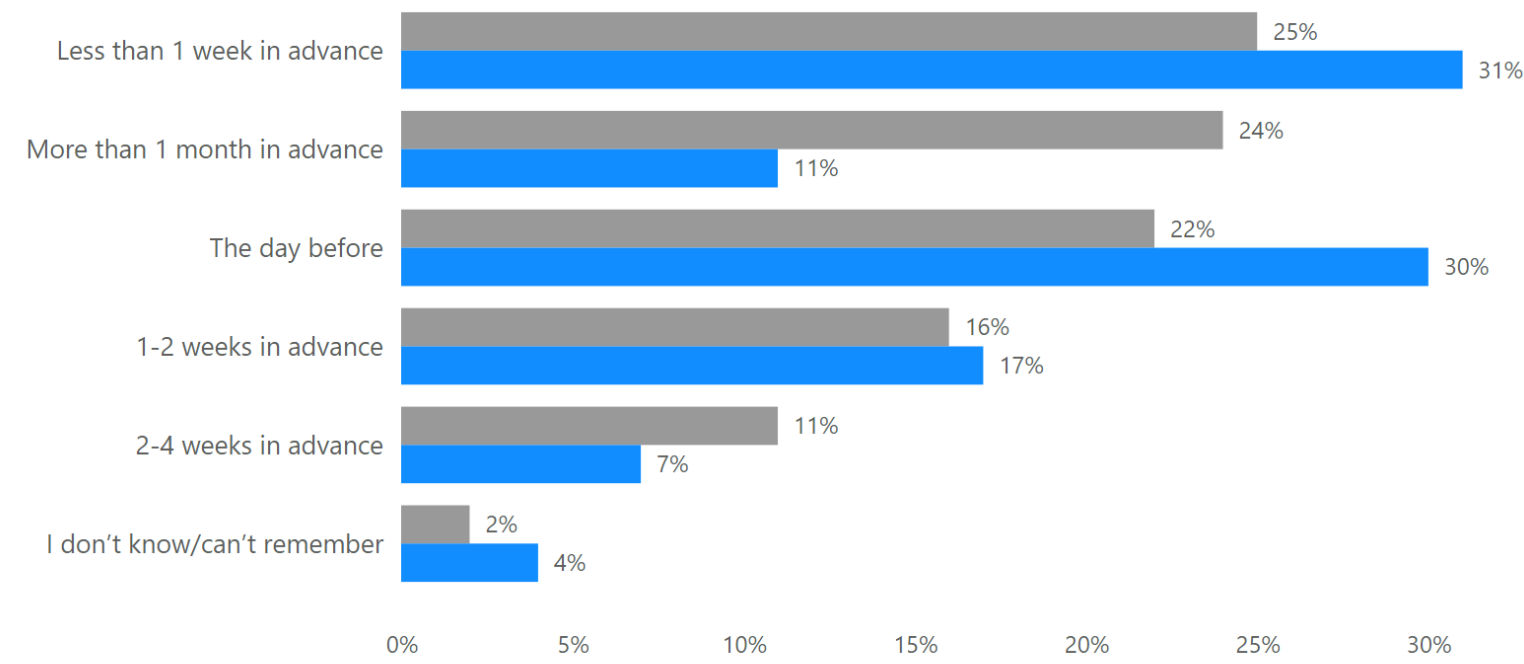


- Hiking visitors use online booking engines slightly more often than overall visitors. Online booking is the most used booking channel.
- Visitors indicating hiking as their main holiday type tend to decide more commonly between 2 and 4 weeks prior to their vacation. Deciding between 1 and 3 months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

Decision moment

Same-day visitors

● All Inbound ● Hiking (excursion type)

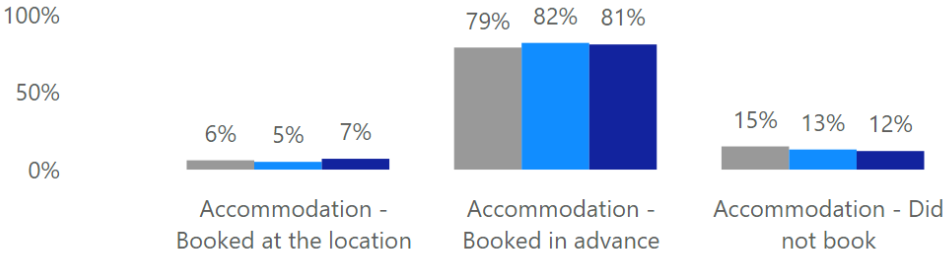


- Among same-day visitors, hiking visitors typically make their travel decisions within a shorter timeframe prior to their trip: less than 1 week in advance or the day before are the most mentioned decision moments.

Booking of travel items

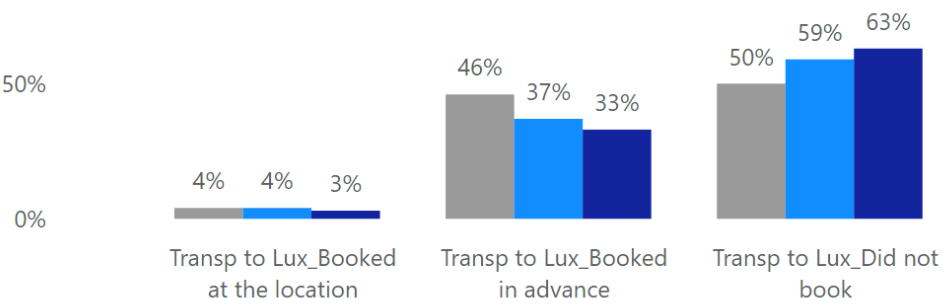
Accommodation

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



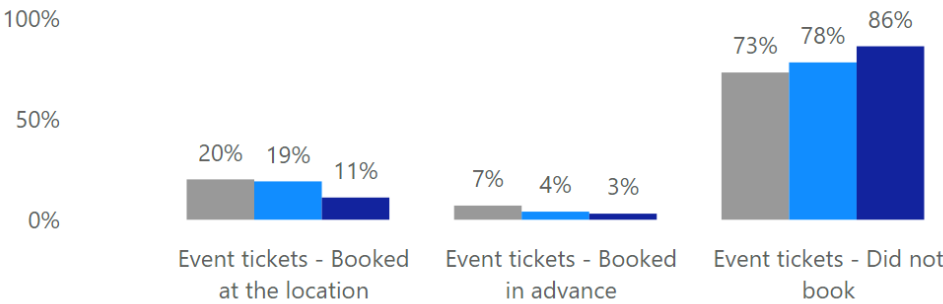
Transport to Luxembourg

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



Event tickets

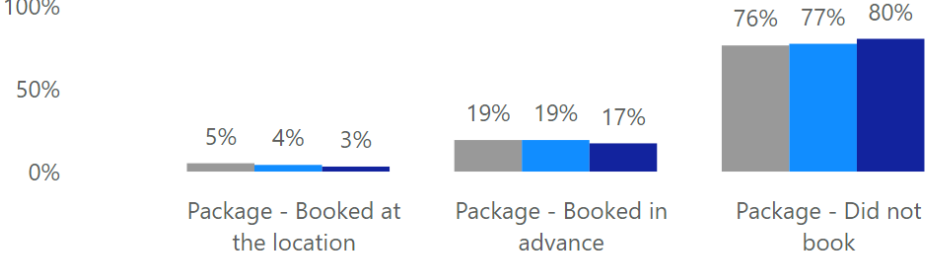
Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Booking of travel items

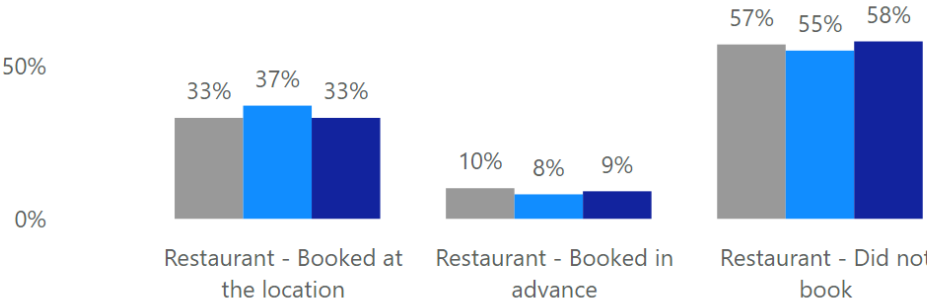
Package

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



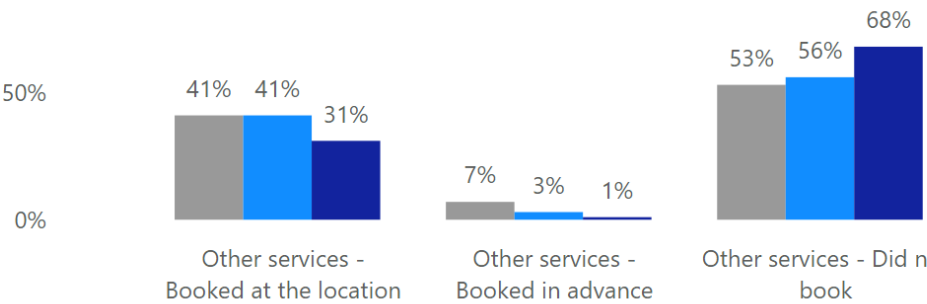
Restaurant

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



Other services

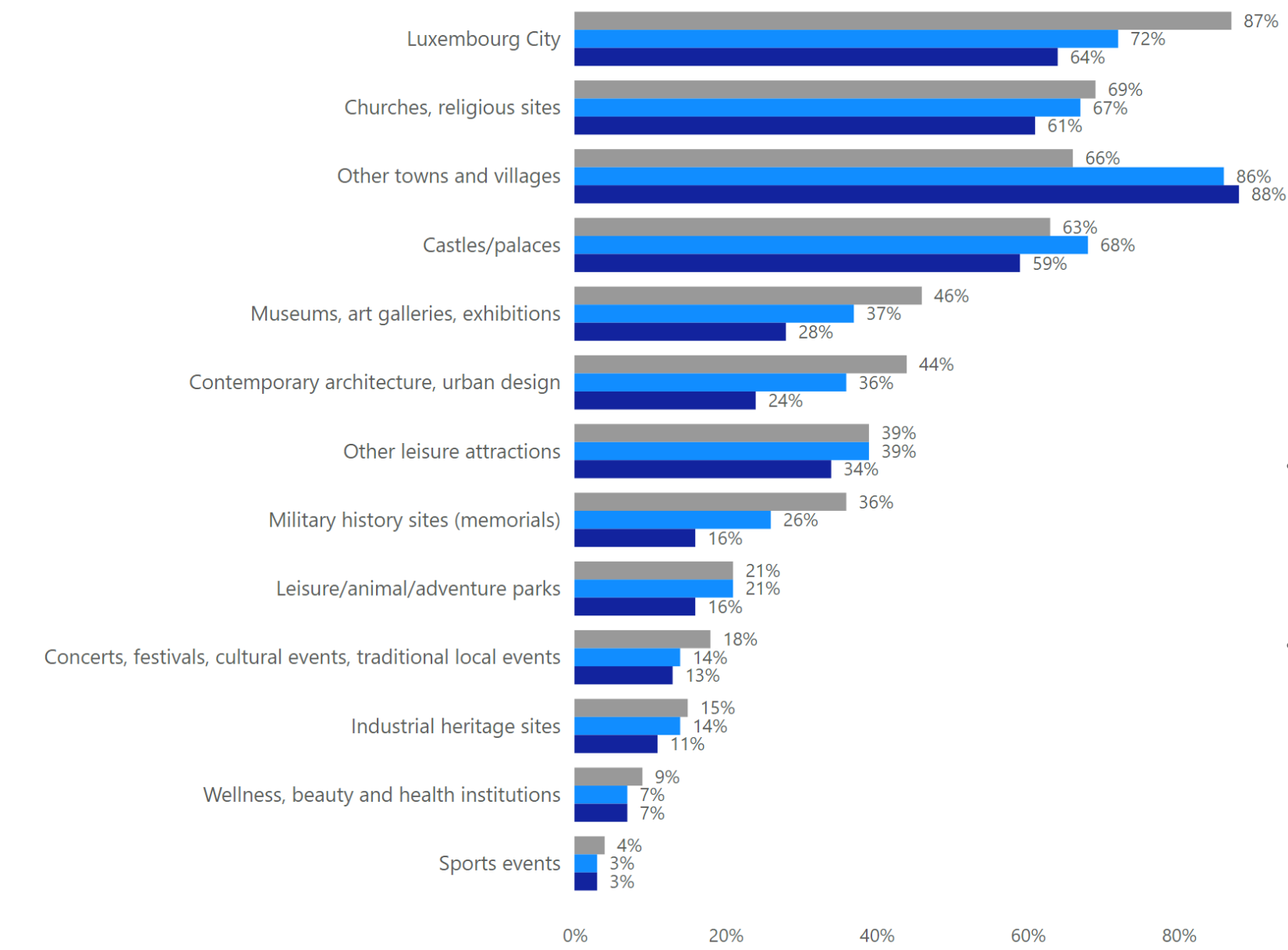
Attribut ● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Places visited

Visitors with overnight

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

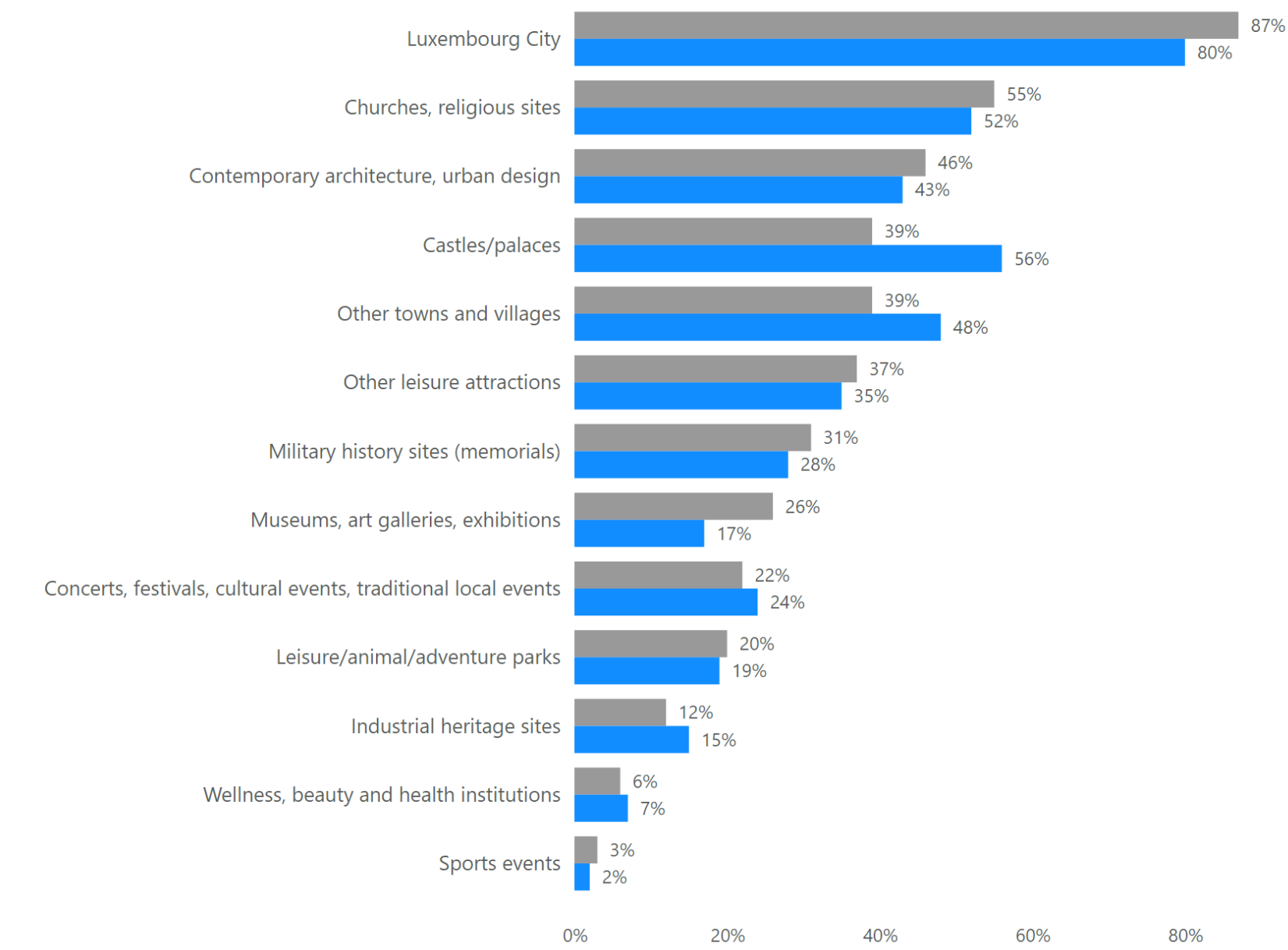


- Other towns and villages are mentioned the most by overall hiking visitors in regard to their visited places. For visitors with hiking as a component of their holiday trip, castles/palaces are mentioned slightly more often.
- Museums, contemporary architecture as well as military history sites are 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)

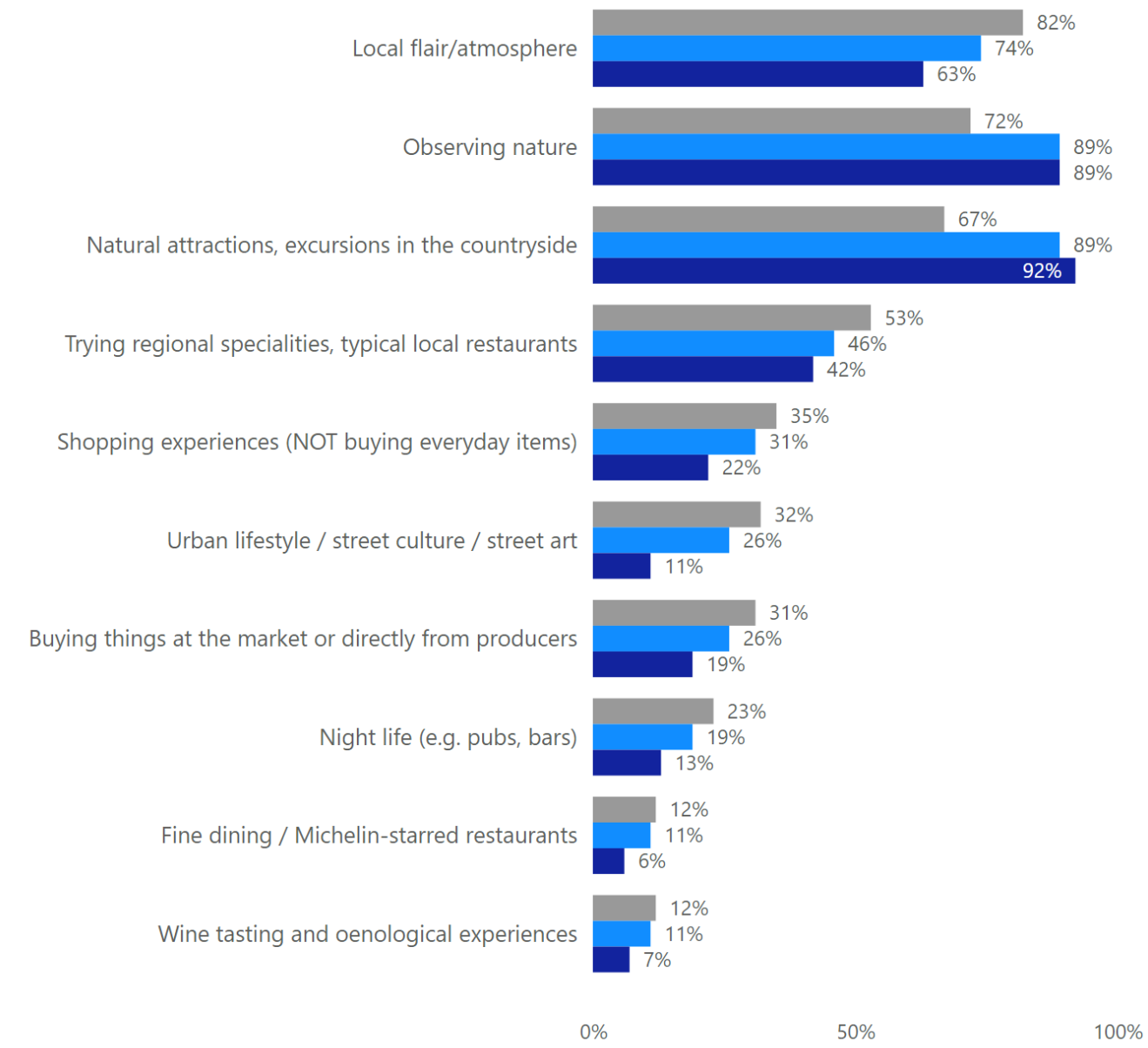


- For same-day visitors, castles/palaces are an especially popular place to visit among hiking excursionists. Likewise to overnight visitors, other towns and village are also more often, and museums less often visited by hiking same-day visitors than all same-day travellers.

Non-sporting activities

Visitors with overnight

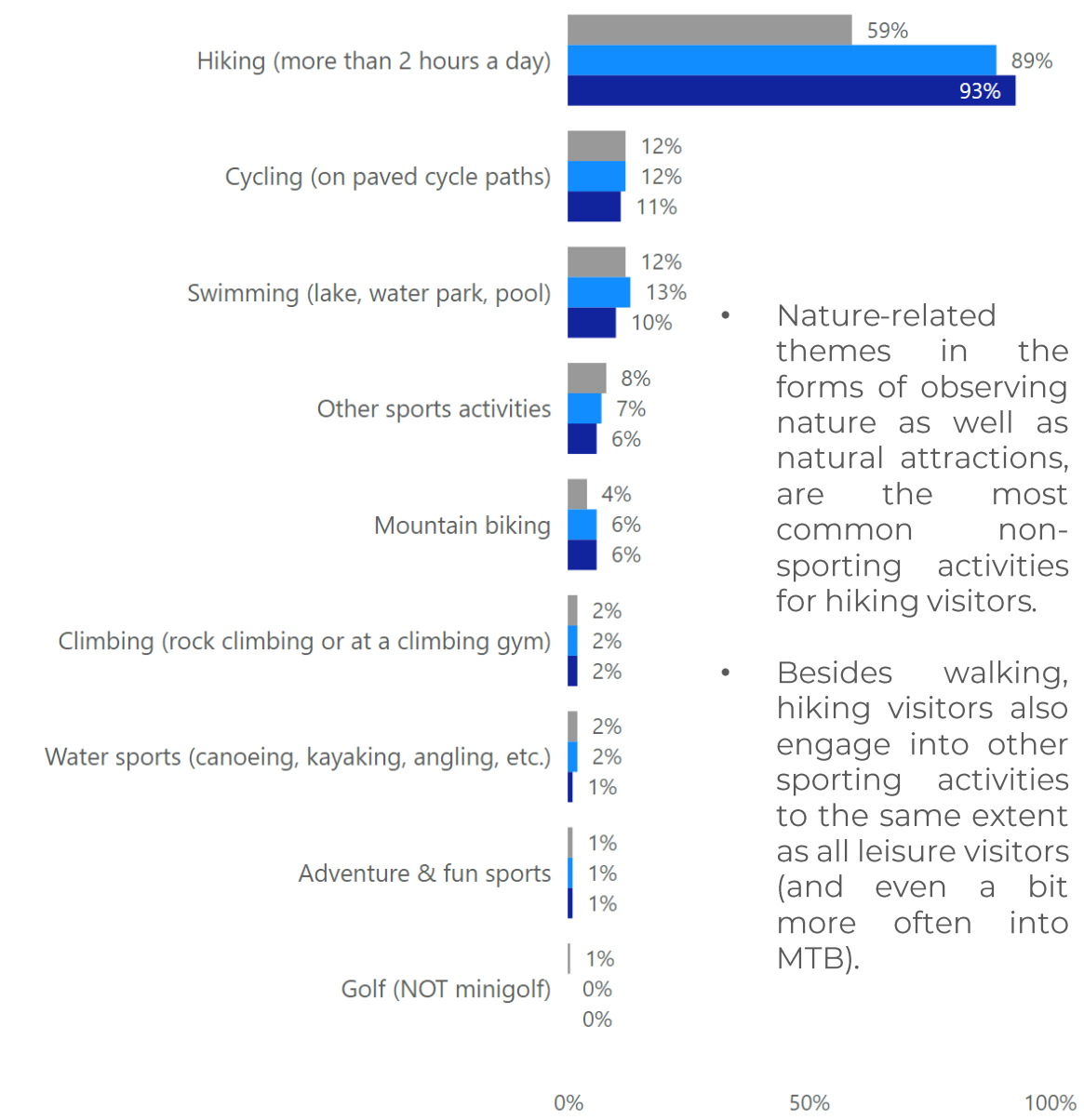
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Sporting activities

Visitors with overnight

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

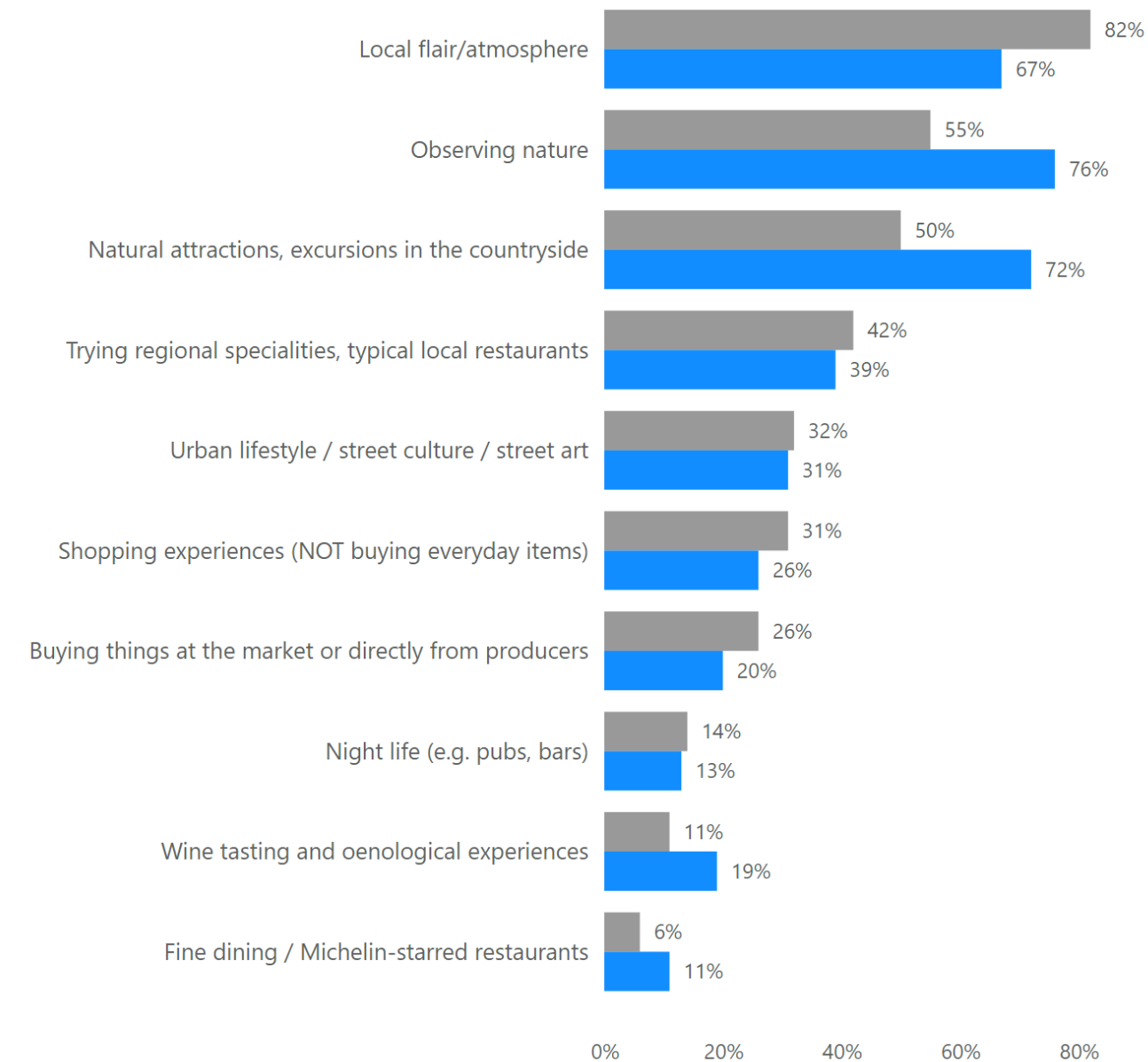


- Nature-related themes in the forms of observing nature as well as natural attractions, are the most common non-sporting activities for hiking visitors.
- Besides walking, hiking visitors also engage into other sporting activities to the same extent as all leisure visitors (and even a bit more often into MTB).

Non-sporting activities

Same-day visitors

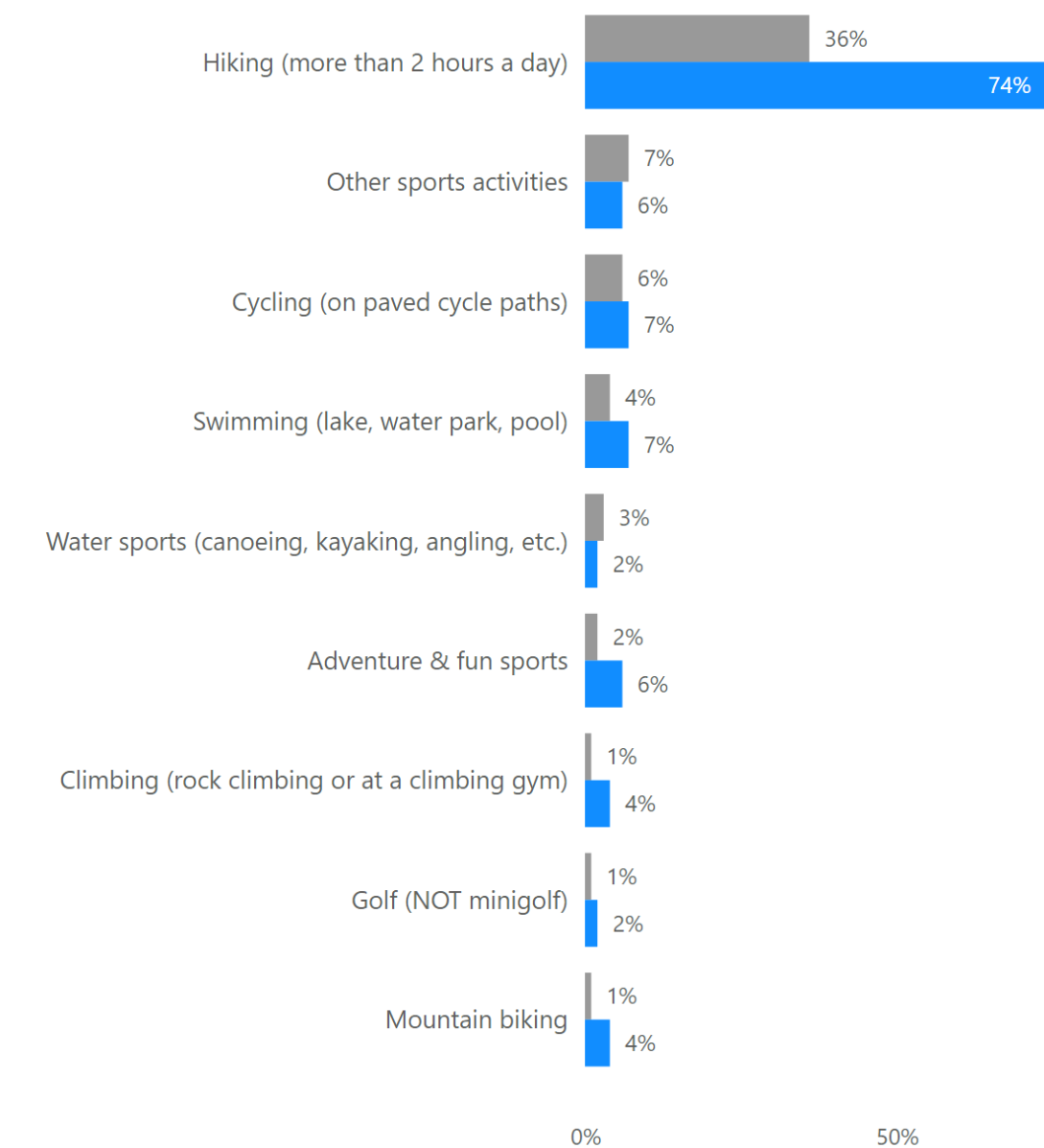
● All Inbound ● Hiking (excursion type)



Sporting activities

Same-day visitors

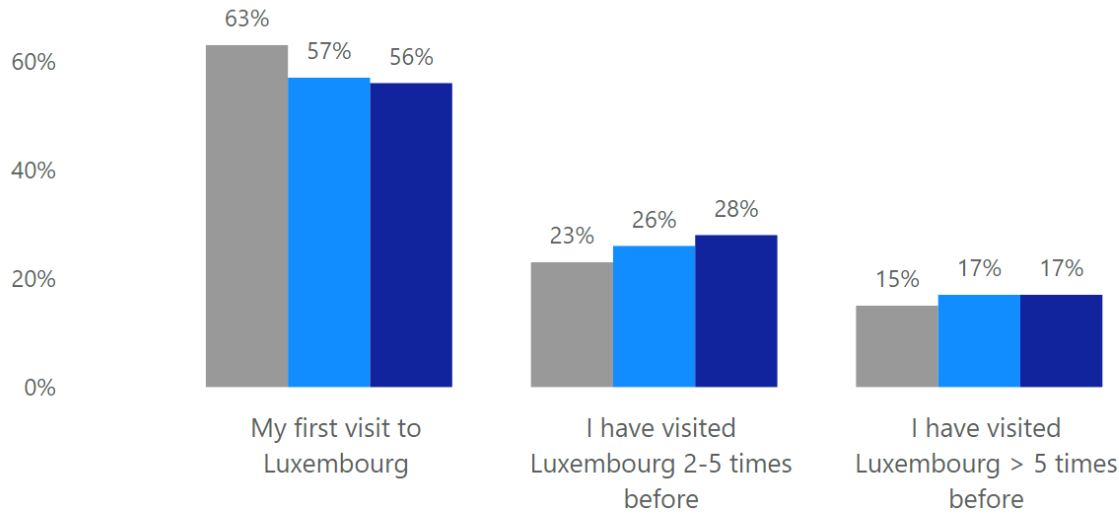
● All Inbound ● Hiking (excursion type)



Frequency of visit

Visitors with overnight

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



First-time visitors

Visitors with overnight

57%

Hiking (holiday trip)

56%

Hiking (main holiday type)

63%

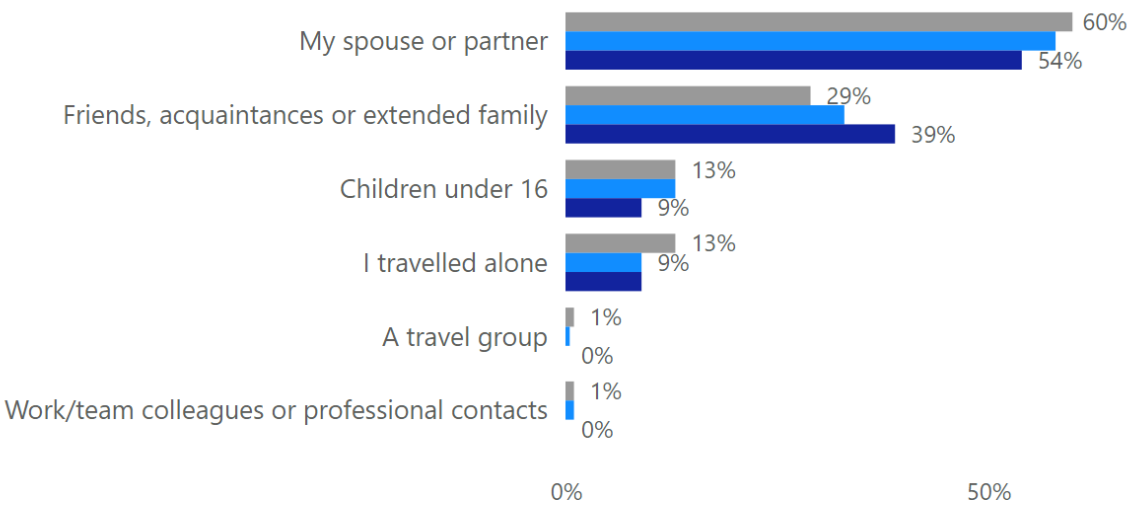
All Inbound

- 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.

Travel party

Visitors with overnight

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



Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

30%

Hiking (holiday trip)

31%

Hiking (main holiday type)

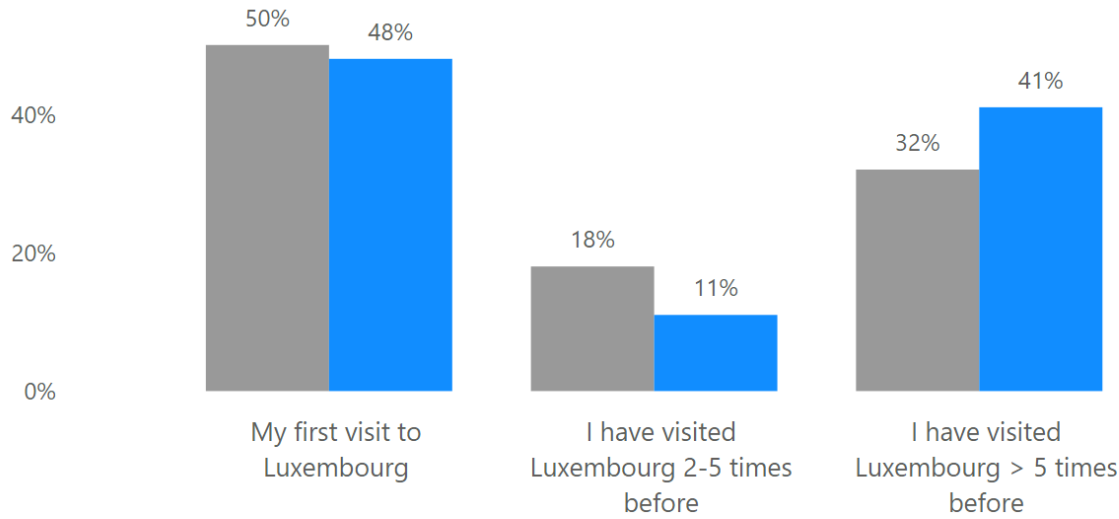
39%

All Inbound

Frequency of visit

Same-day visitors

● All Inbound ● Hiking (excursion type)



First-time visitors

Same-day visitors

48%

Hiking (excursion type)

50%

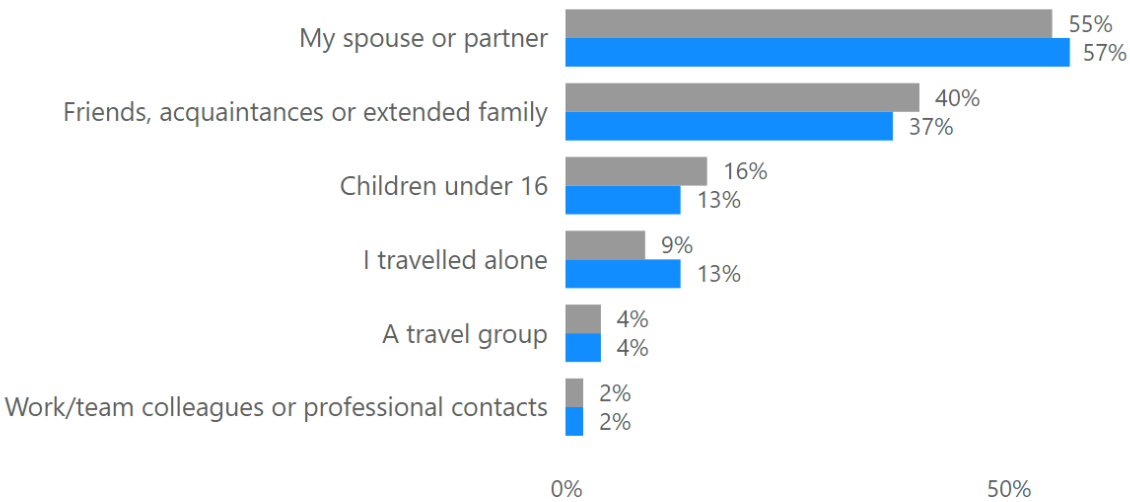
All Inbound

- 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.

Travel party

Same-day visitors

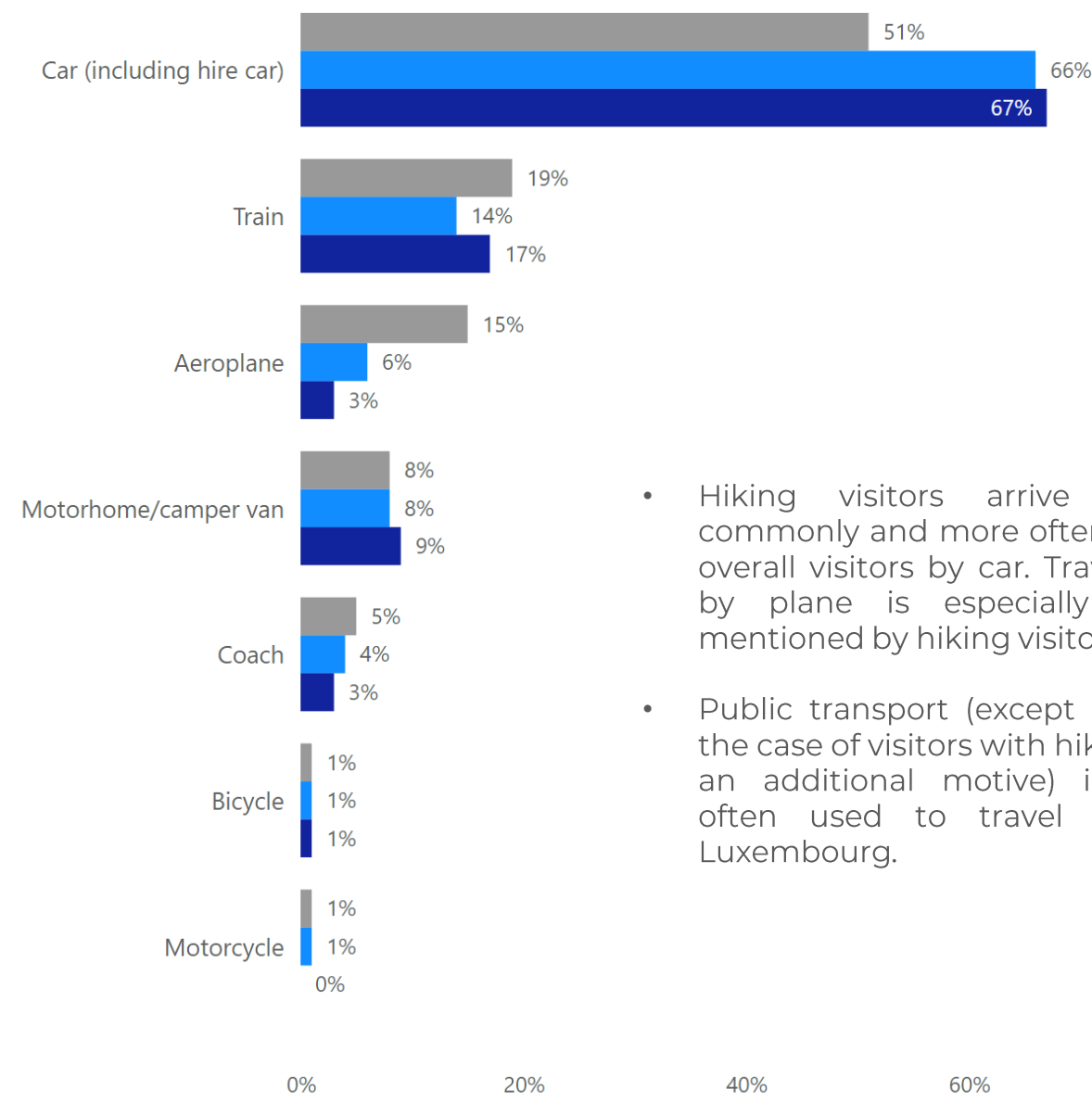
● All Inbound ● Hiking (excursion type)



Transport to destination

Visitors with overnight

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

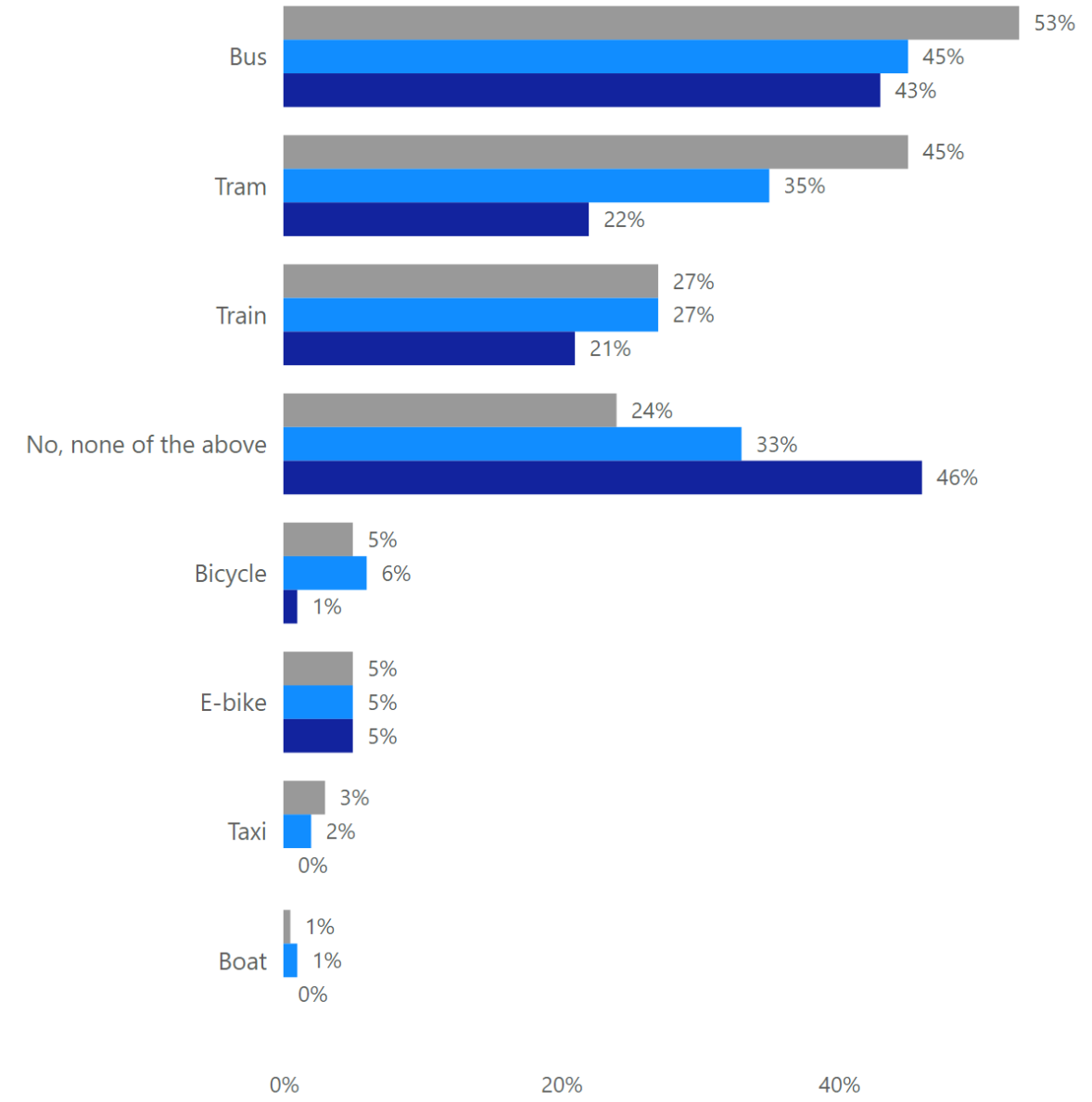


- Hiking visitors arrive most commonly and more often than overall visitors by car. Travelling by plane is especially little mentioned by hiking visitors.
- Public transport (except rail, in the case of visitors with hiking as an additional motive) is less often used to travel across Luxembourg.

Transport in destination

Visitors with overnight

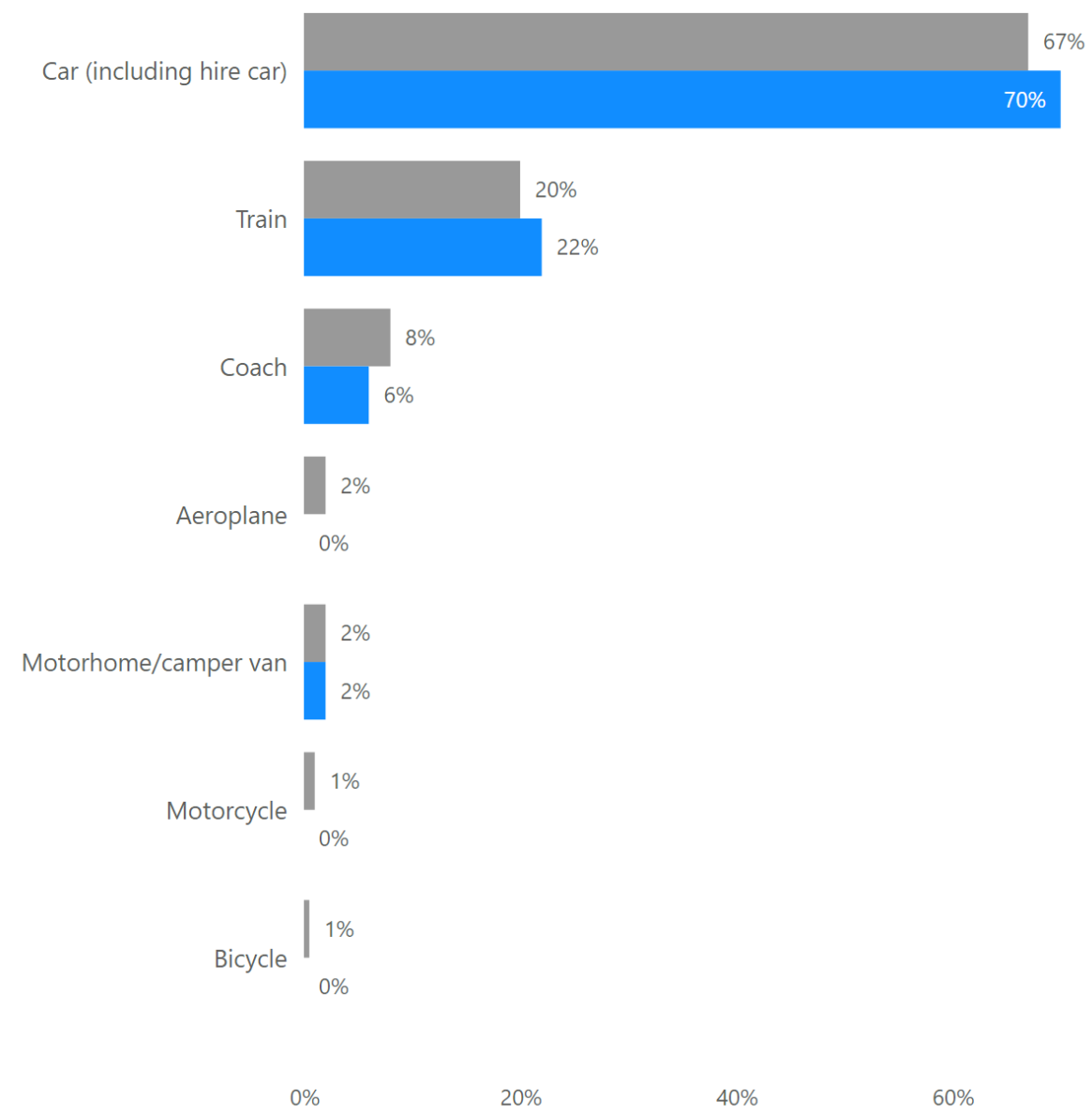
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Transport to destination

Same-day visitors

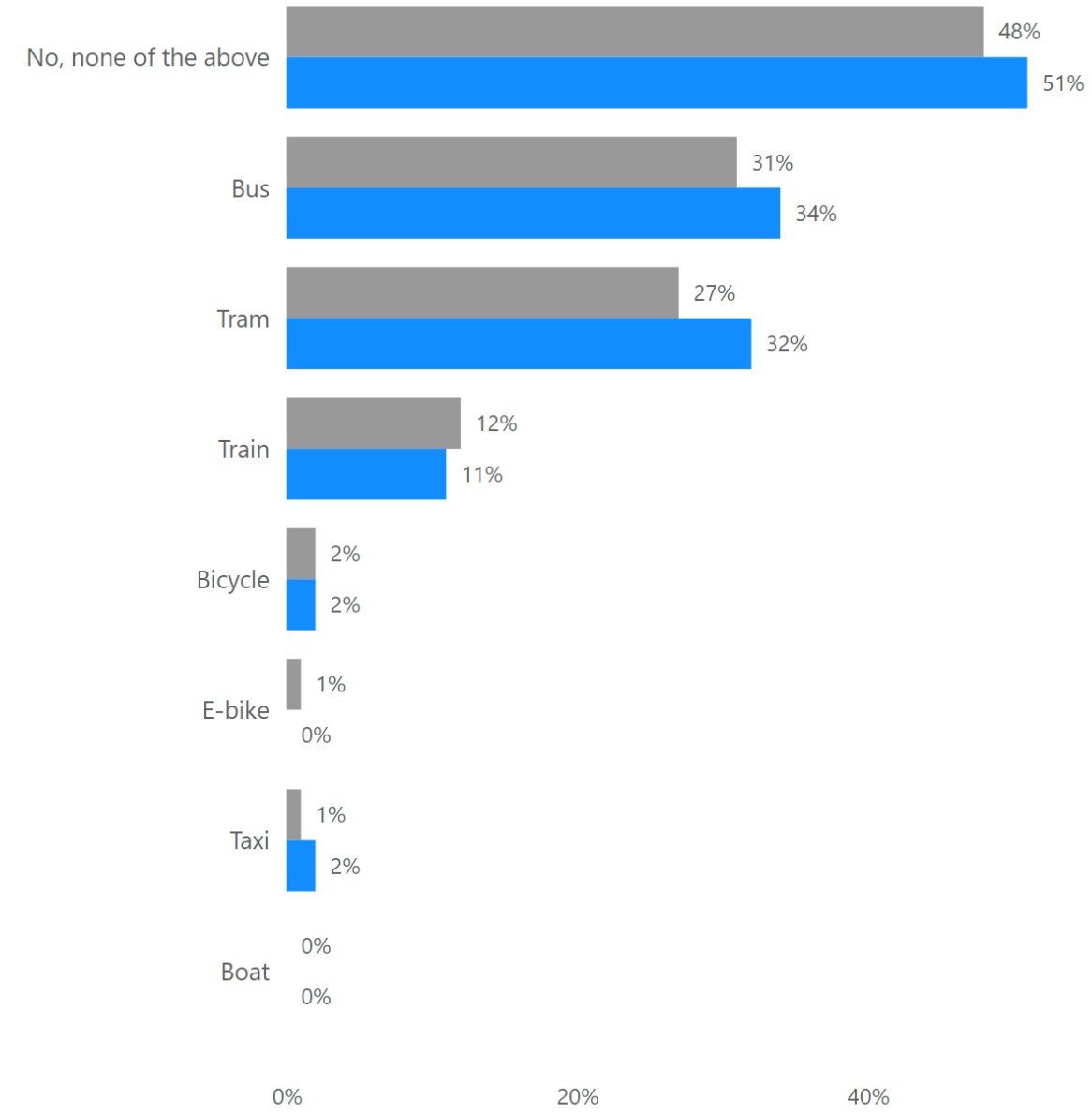
● All Inbound ● Hiking (excursion type)



Transport in destination

Same-day visitors

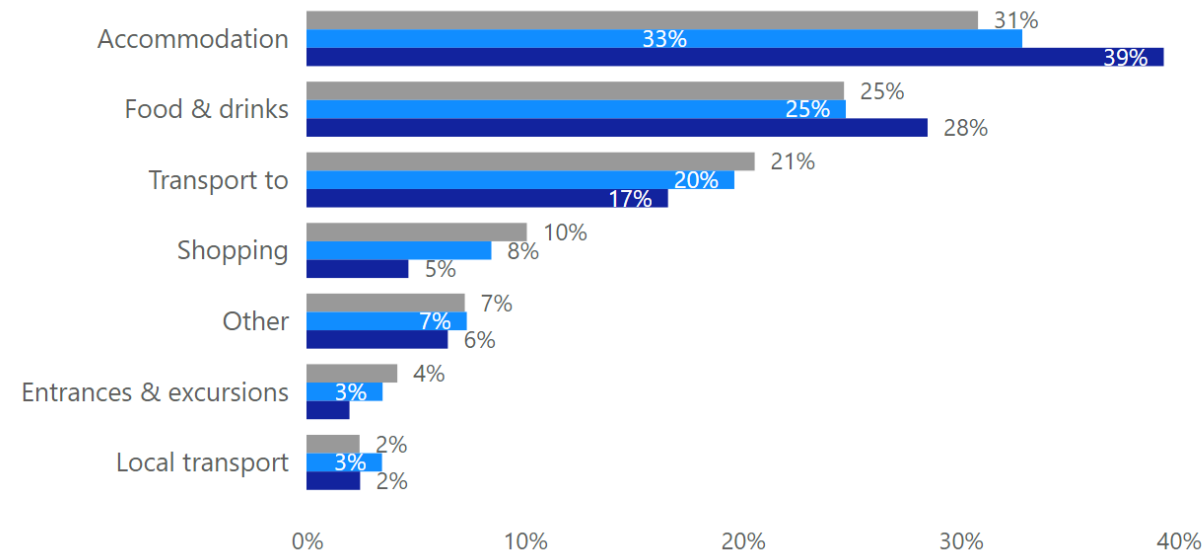
● All Inbound ● Hiking (excursion type)



Spending categories

Visitors with overnight

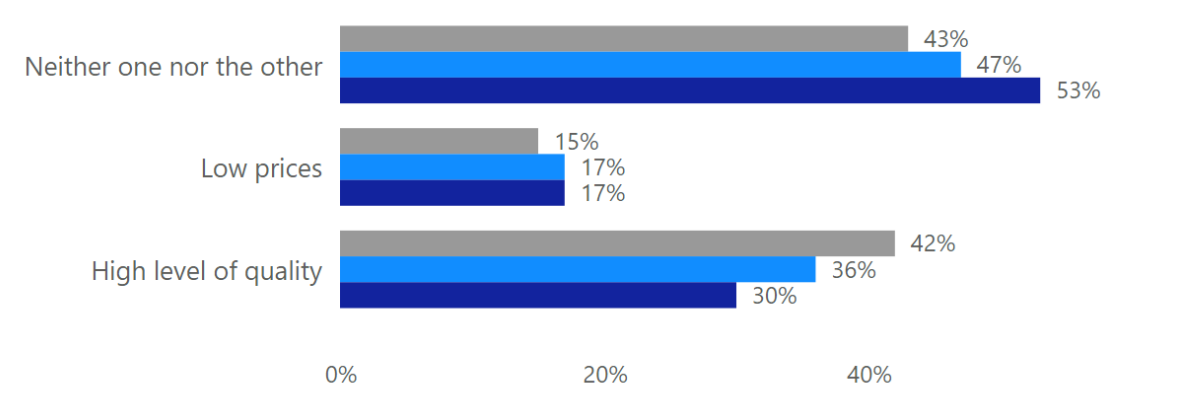
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Quality vs. price orientation

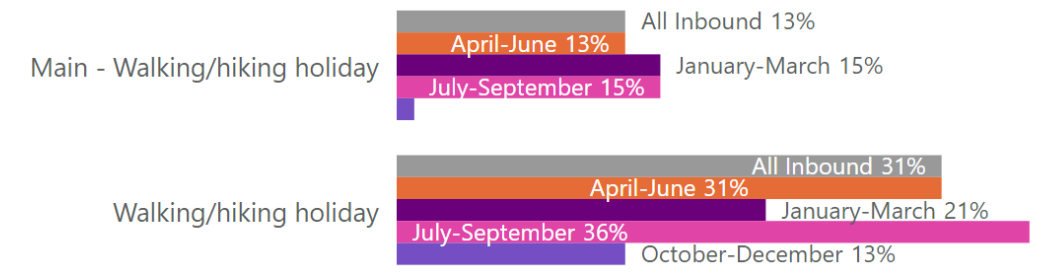
Visitors with overnight

● 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)

534 €

Hiking (main holiday type)

619 €

All Inbound

Spend/pers./night

Visitors with overnight

141 €

Hiking (holiday trip)

131 €

Hiking (main holiday type)

160 €

All Inbound

Length of stay (nights)

Visitors with overnight

4,3

Hiking (holiday trip)

4,1

Hiking (main holiday type)

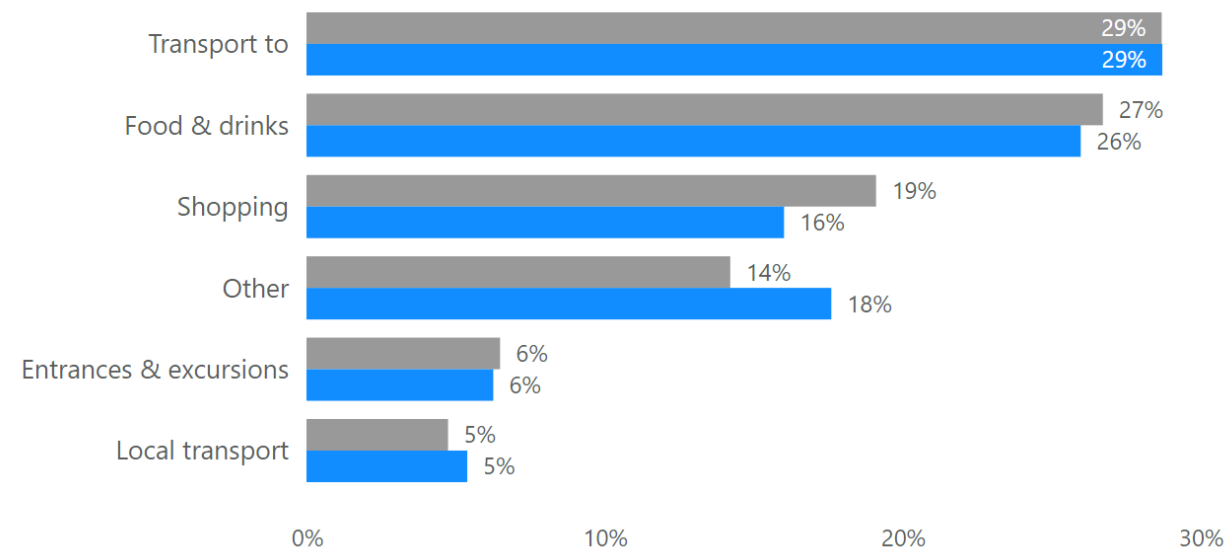
3,9

All Inbound

Spending categories

Same-day visitors

● All Inbound ● Hiking (excursion type)



Spend/pers./exc
urs.

Same-day visitors

169 €

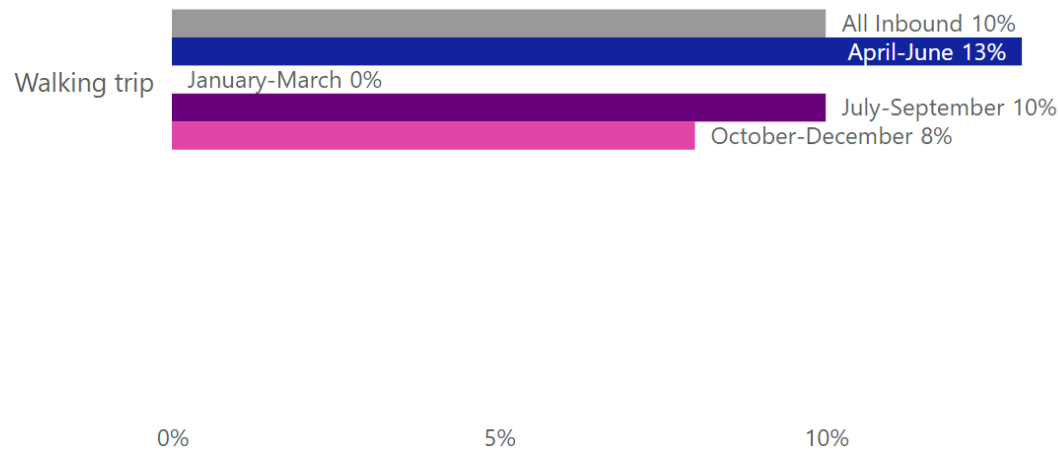
Hiking (excursion type)

245 €

All Inbound

Shares by arrival months

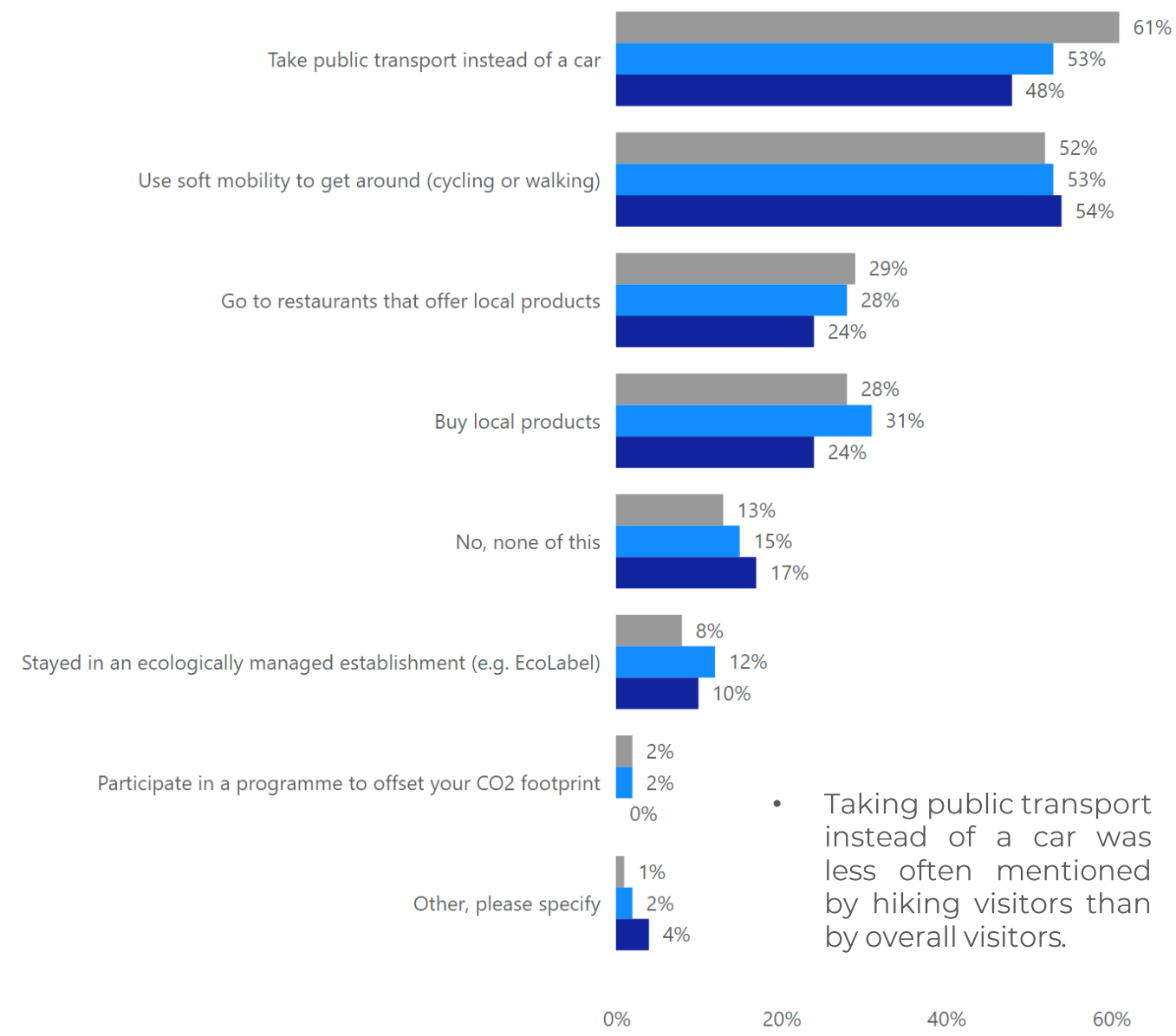
Same-day visitors



Sustainable actions during stay

Visitors with overnight

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

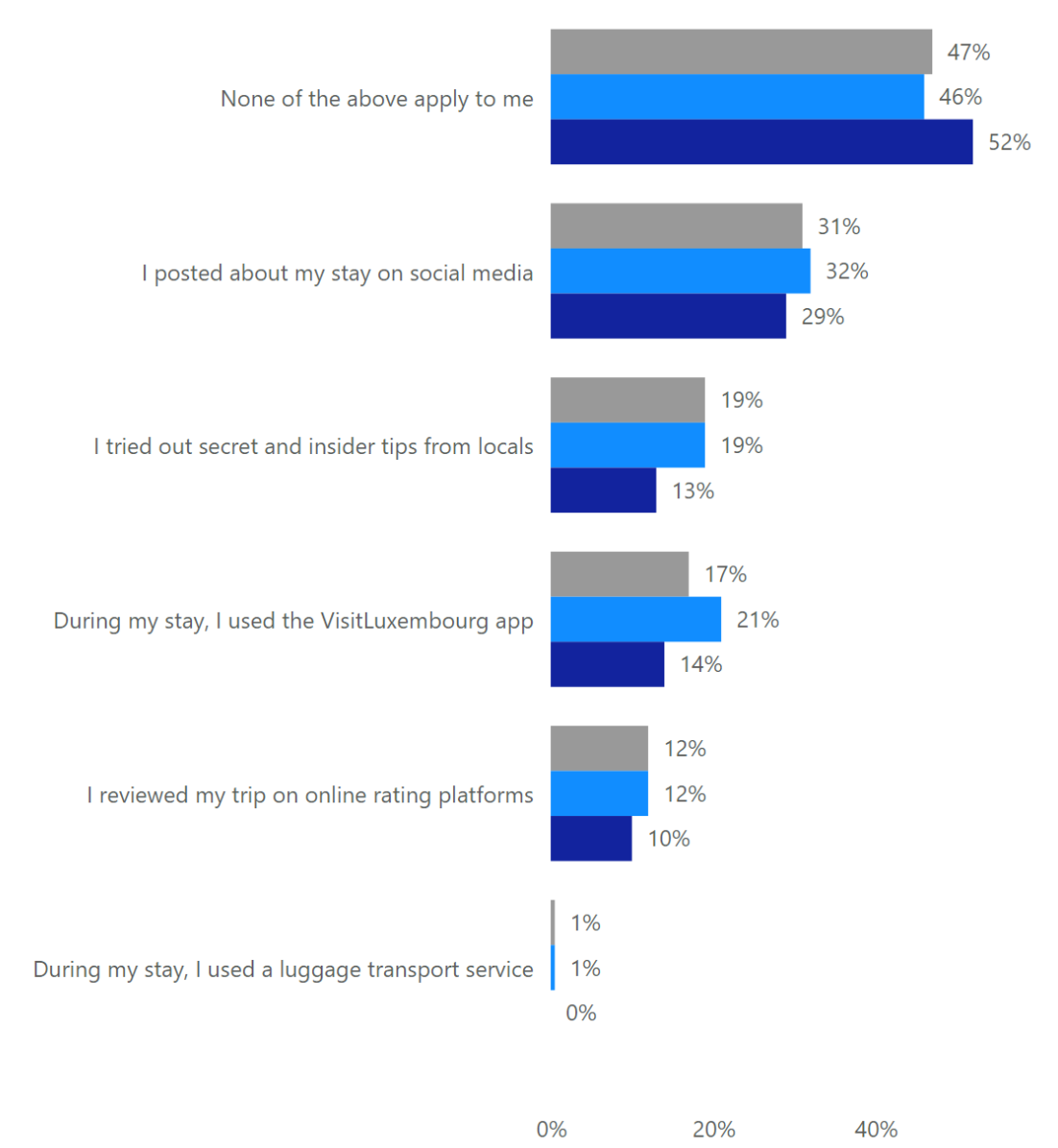


• Taking public transport instead of a car was less often mentioned by hiking visitors than by overall visitors.

Services used during stay

Visitors with overnight

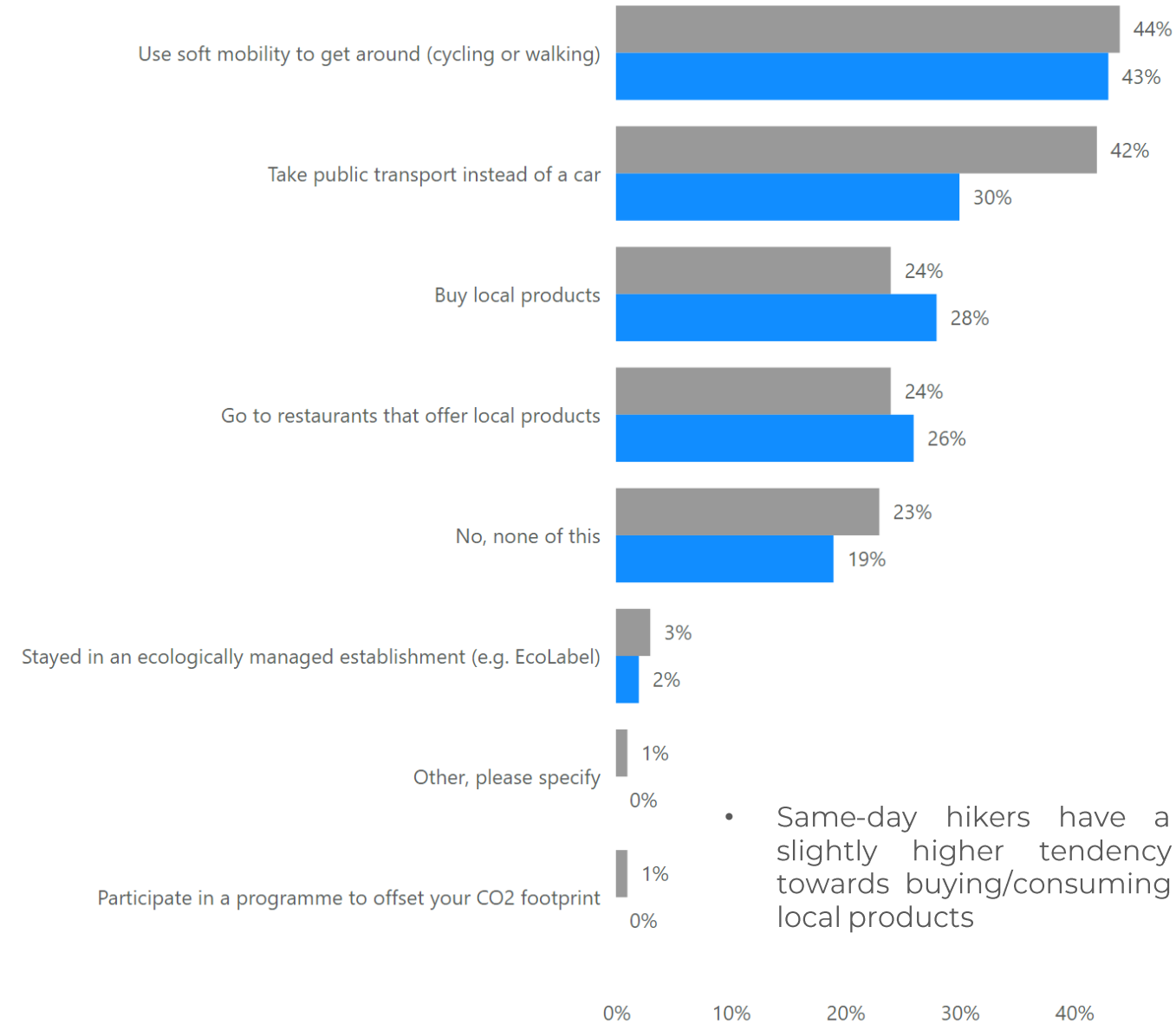
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Sustainable actions during stay

Same-day visitors

● All Inbound ● Hiking (excursion type)

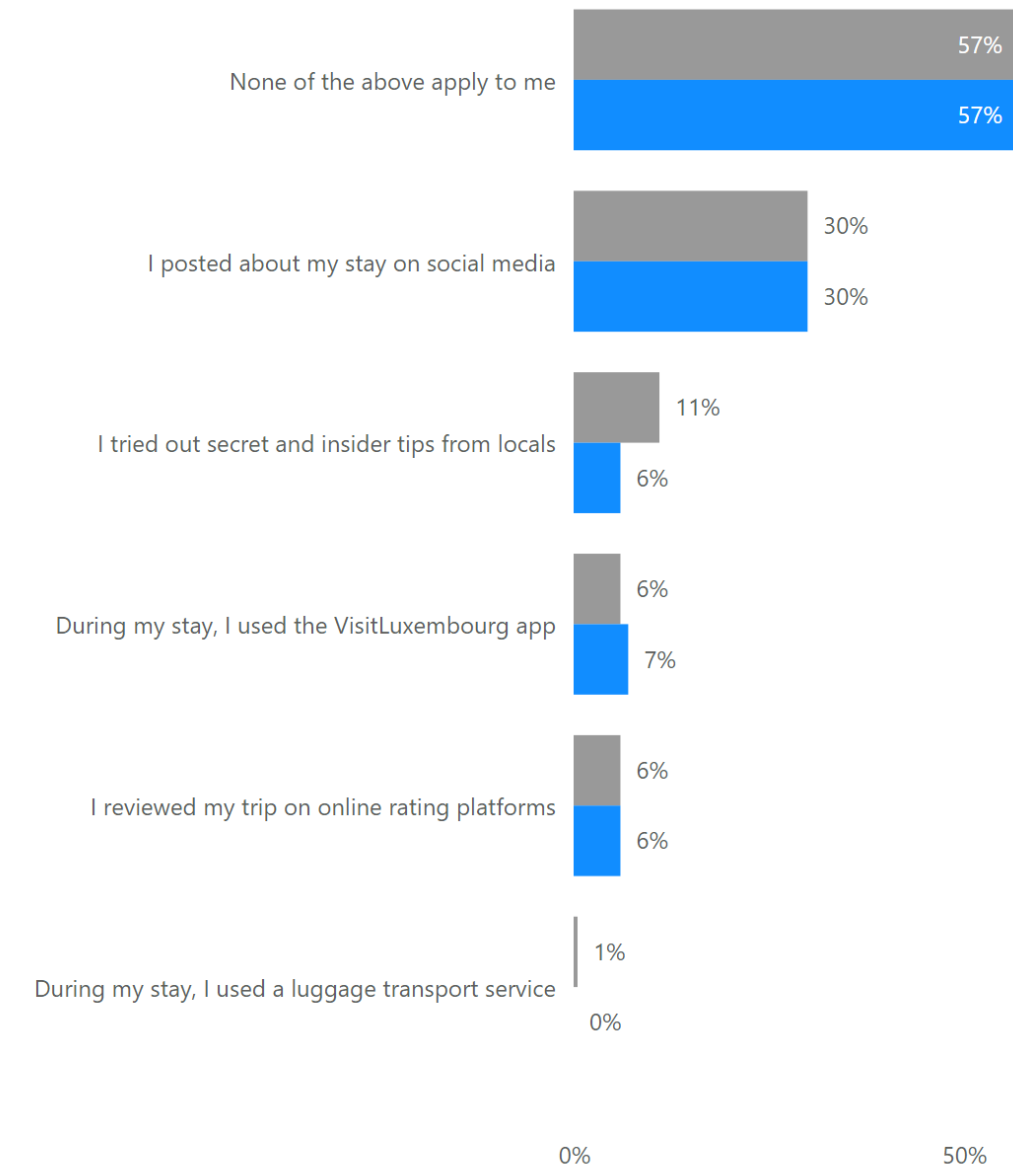


• Same-day hikers have a slightly higher tendency towards buying/consuming local products

Services used during stay

Same-day visitors

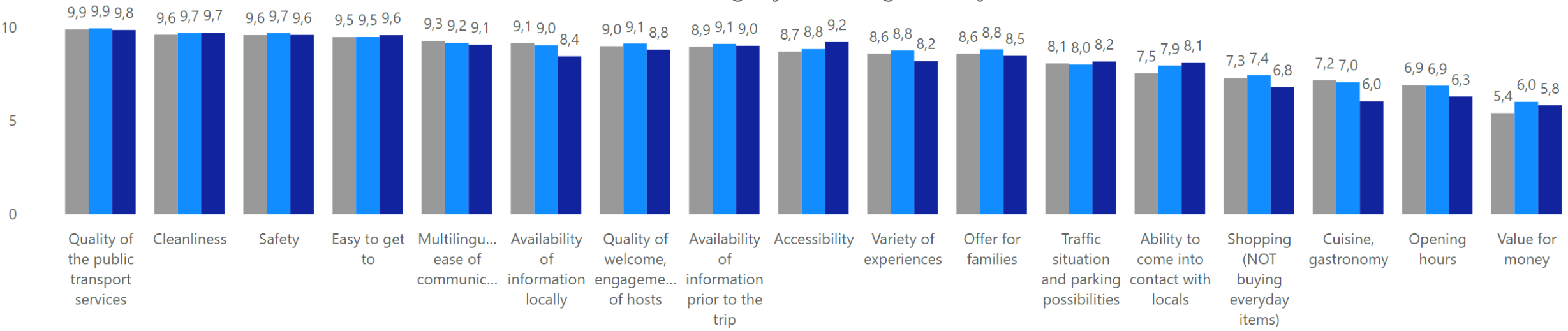
● All Inbound ● Hiking (excursion type)



Satisfaction items

Visitors with overnight

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

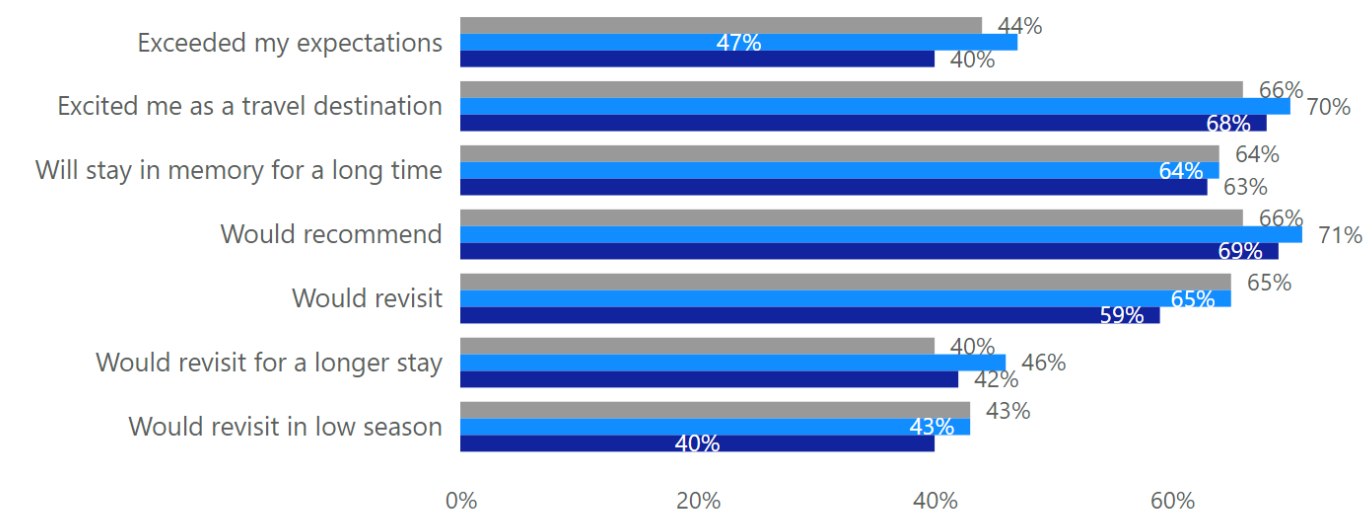


In general, hiking visitors, especially those with hiking as a holiday trip, show similar satisfaction to overall visitors with some exceptions (opening hours, accessibility, gastronomy, availability of information locally – see chart). Recommendation levels are slightly exceeding those by all travellers.

Overall satisfaction - % "strongly agree"

Visitors with overnight

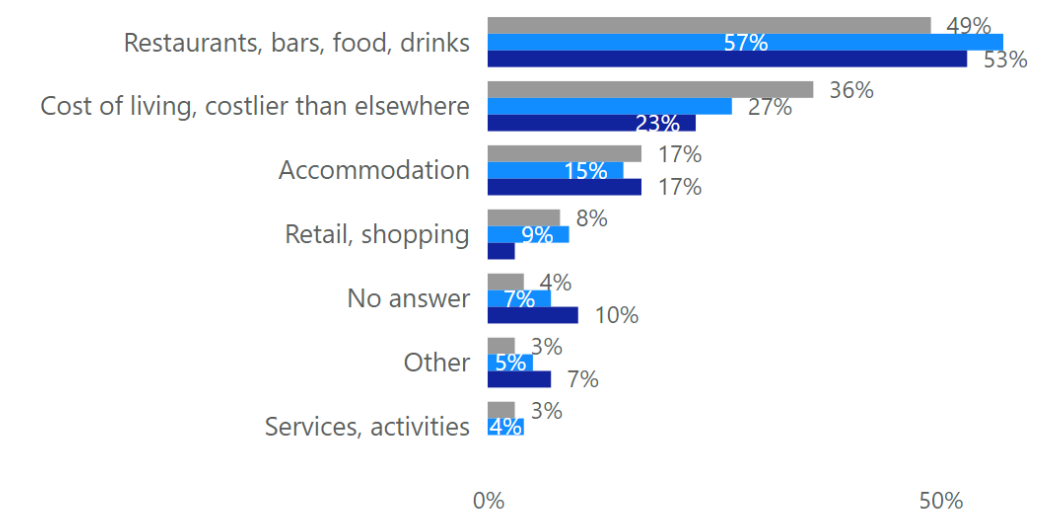
Attribut All Inbound Hiking (holiday trip) Hiking (main holiday type)



Reasons for poor value-for-money

Visitors with overnight

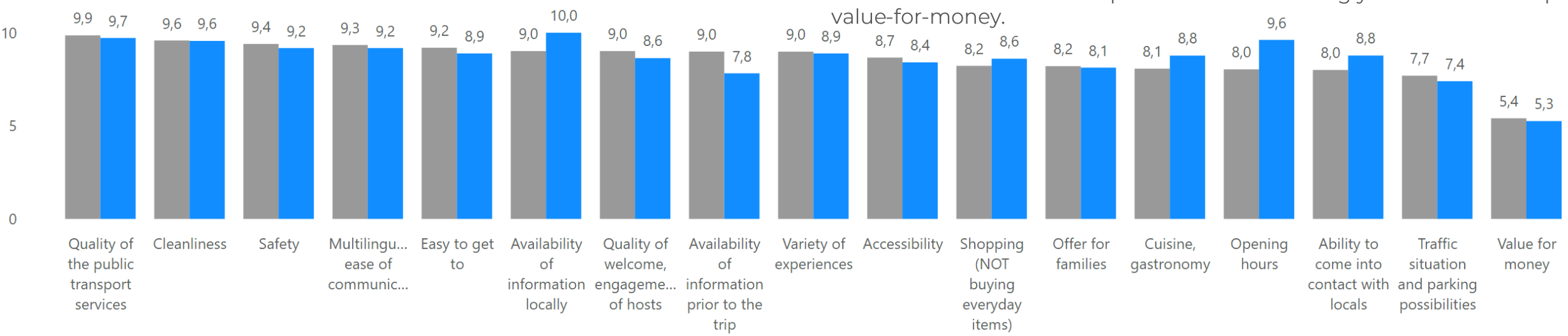
Attribut All Inbound Hiking (holiday trip) Hiking (main holiday type)



Satisfaction items

Same-day visitors

Attribut ● All Inbound ● Hiking (excursion type)

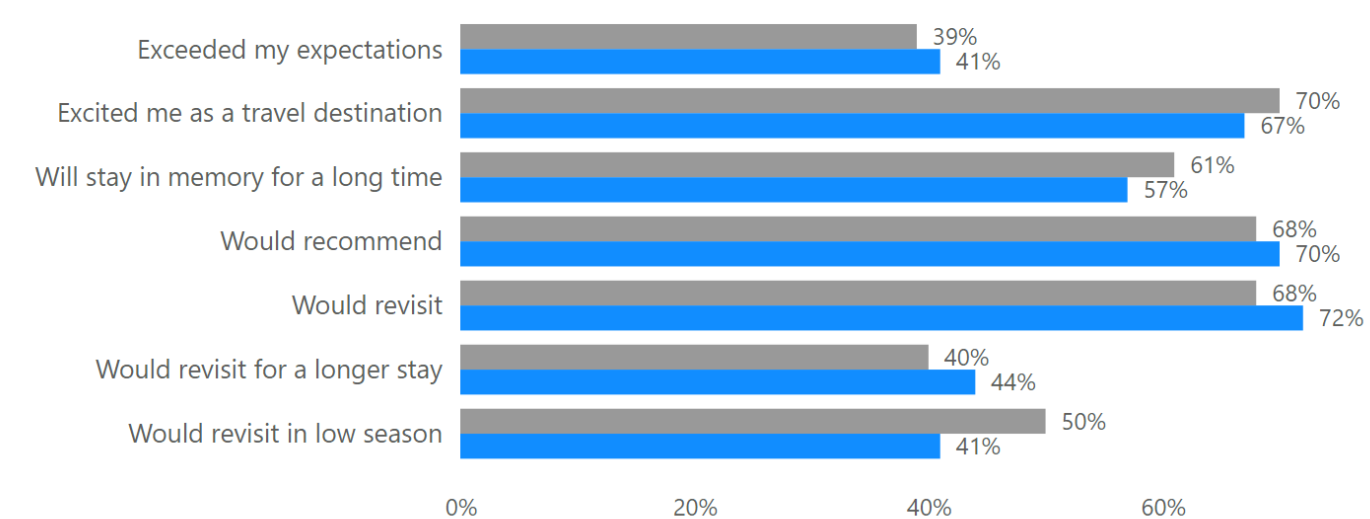


- Contrary to overnight hiking visitors, same-day hikers indicate a perfect score regarding the availability of information locally as well as much higher score for opening hours.
- Restaurants and food are perceived more strongly as a reason for poor value-for-money.

Overall satisfaction - % "strongly agree"

Same-day visitors

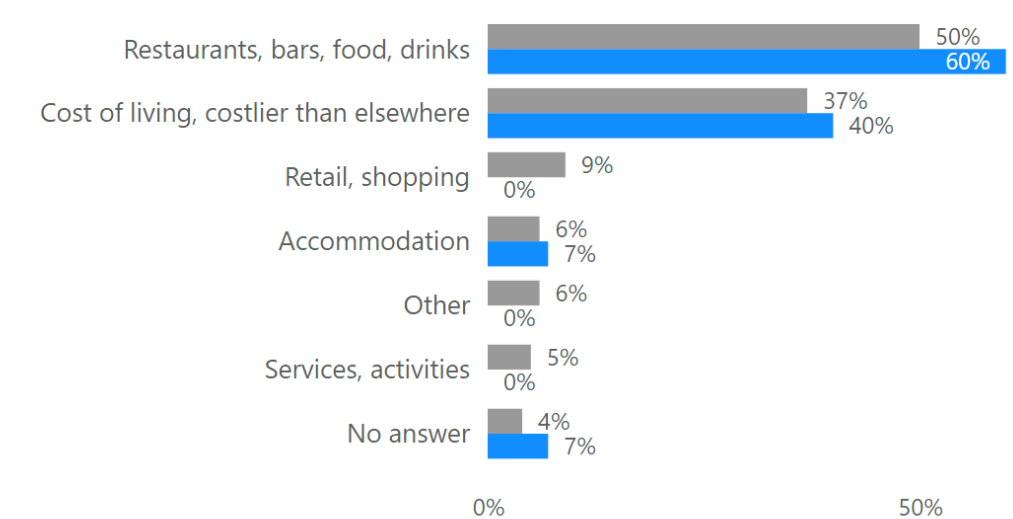
Attribut ● All Inbound ● Hiking (excursion type)



Reasons for poor value-for-money

Same-day visitors

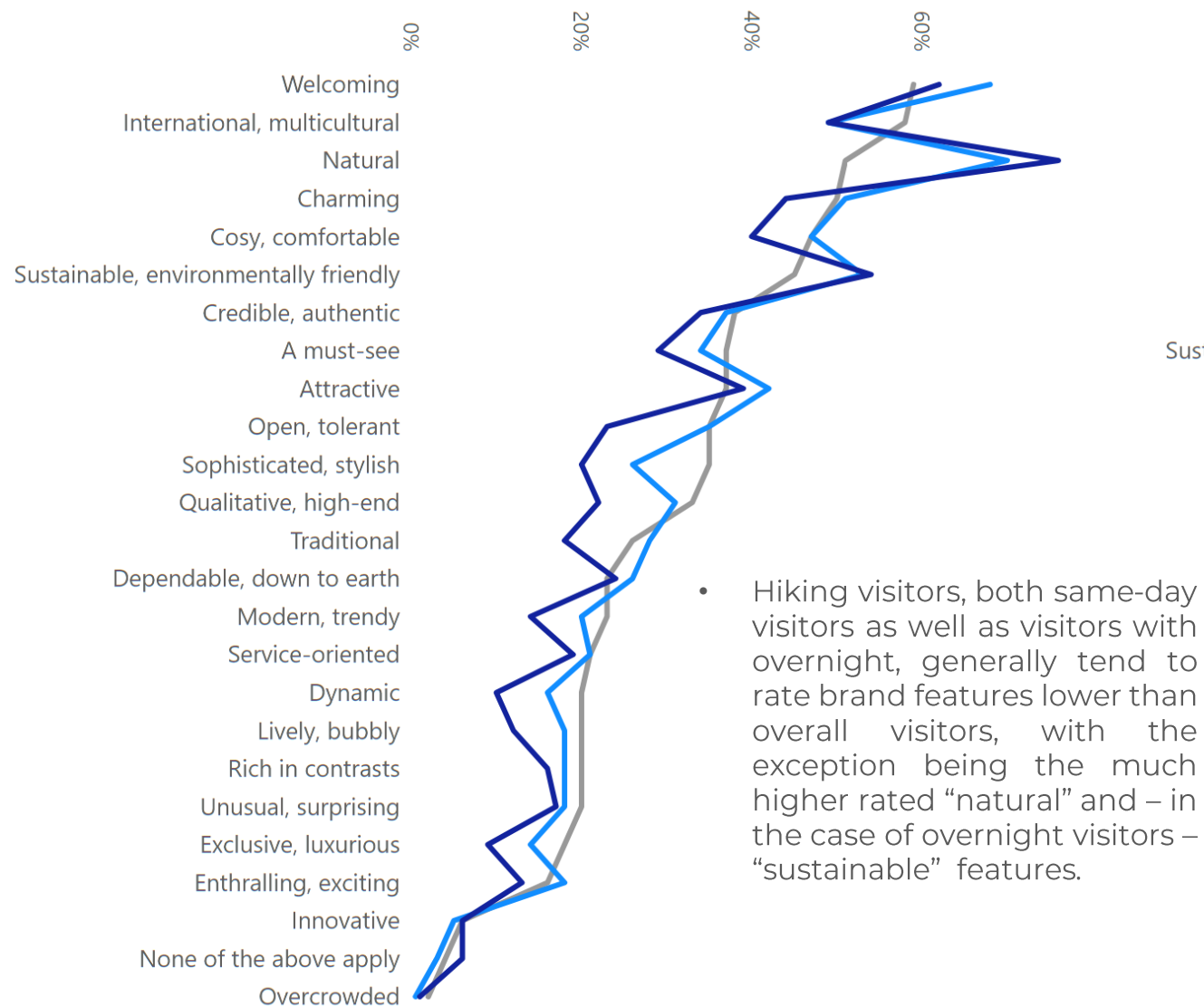
● All Inbound ● Hiking (excursion type)



Brand features

Visitors with overnight

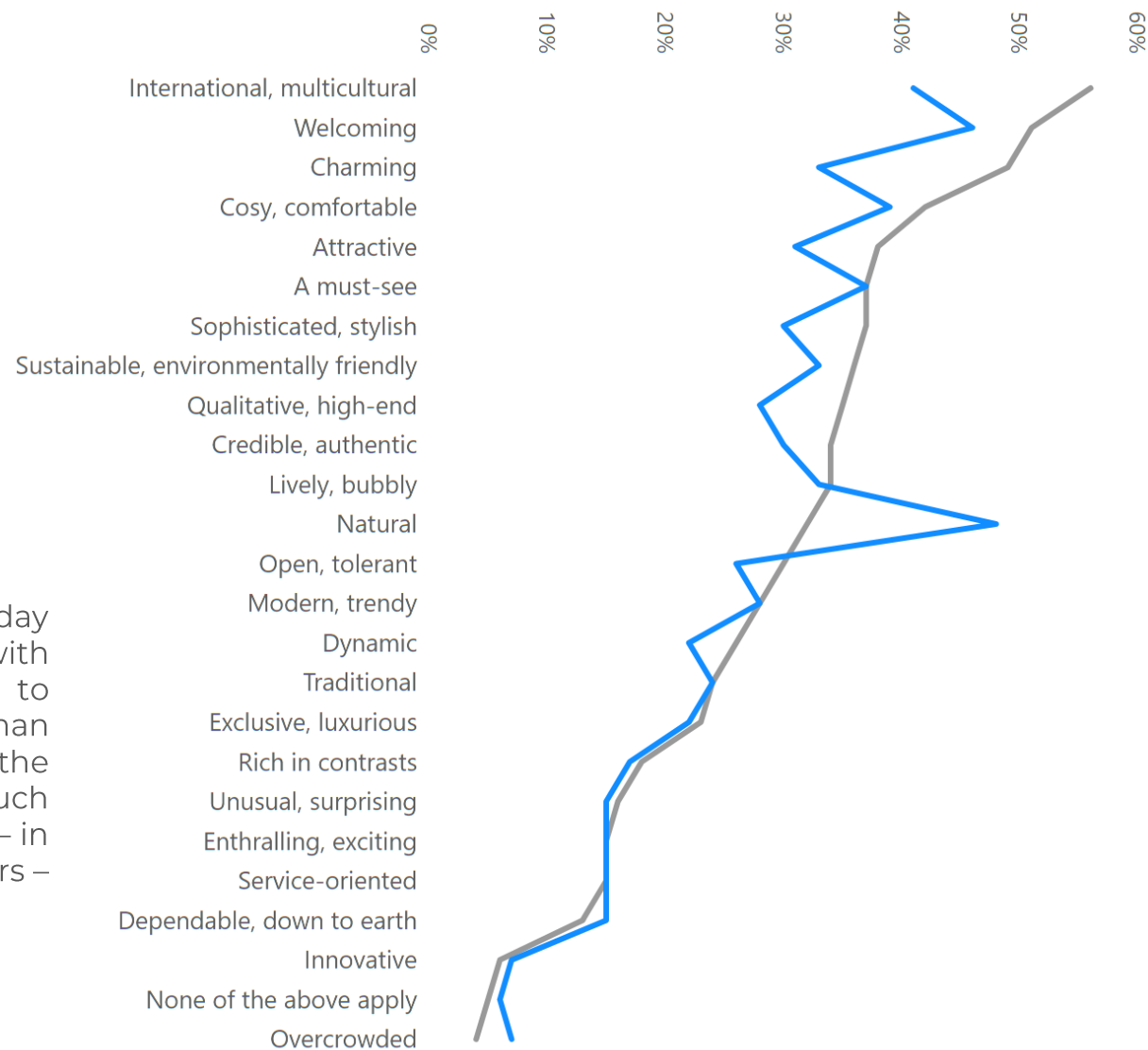
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Brand features

Same-day visitors

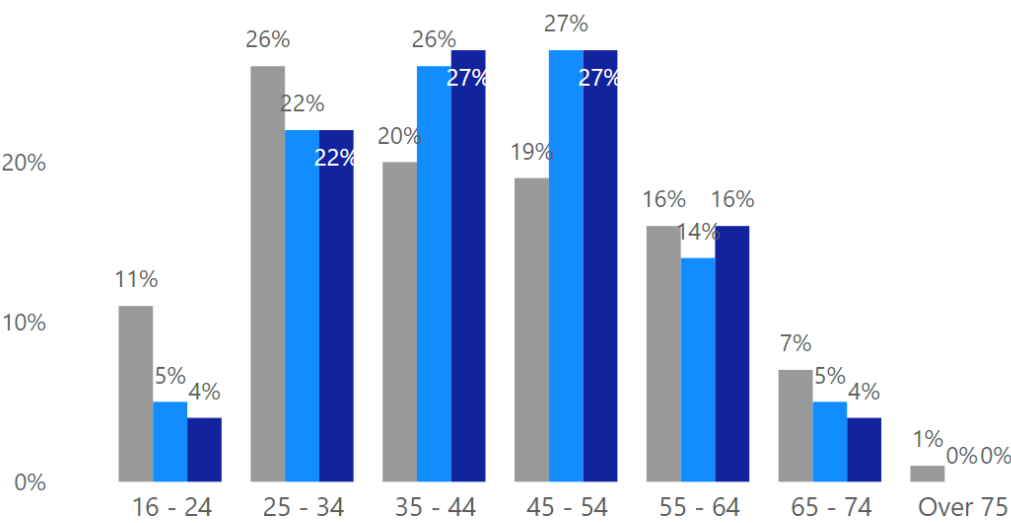
● All Inbound ● Hiking (excursion type)



Age

Visitors with overnight

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

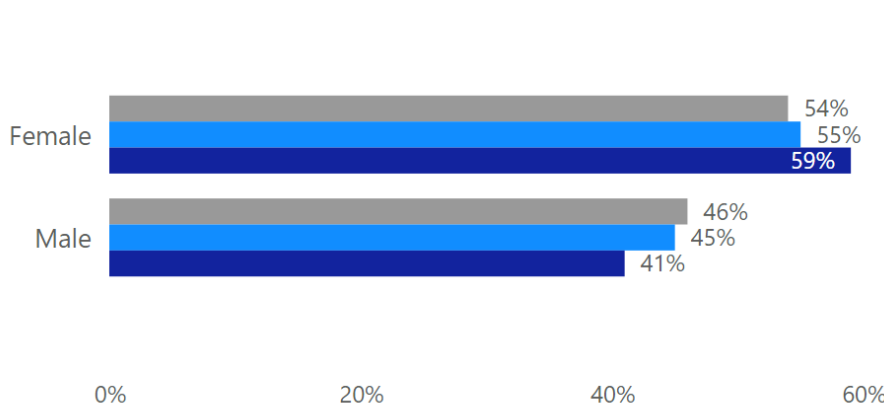


- More than 50% of hiking visitors are aged between 35 and 54 years.
- Gender, education and employment show mostly slight differences between hikers and non-hikers.

Gender

Visitors with overnight

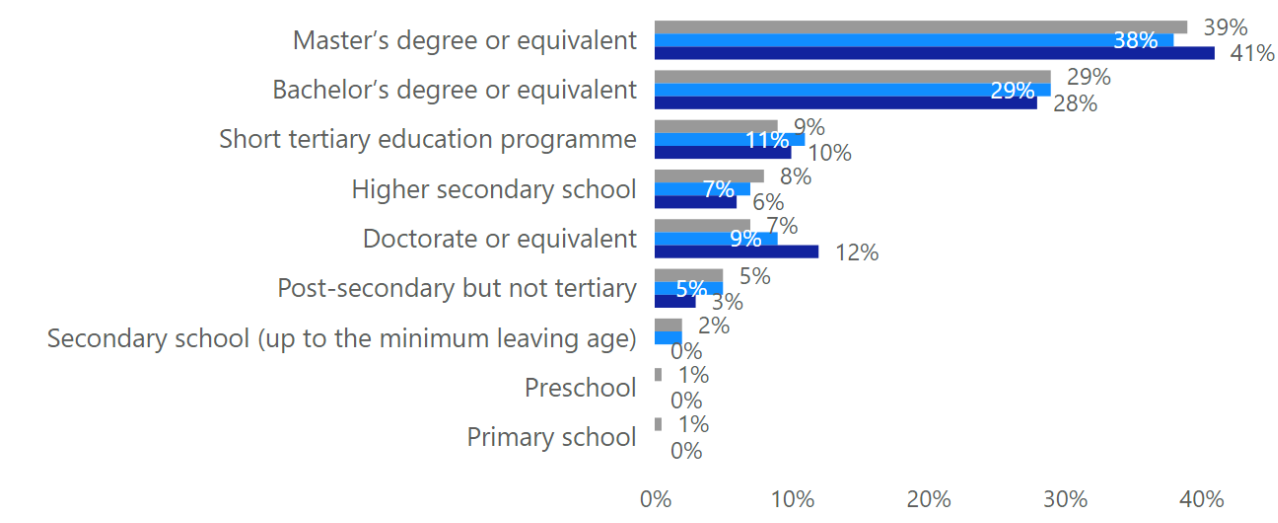
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Education

Visitors with overnight

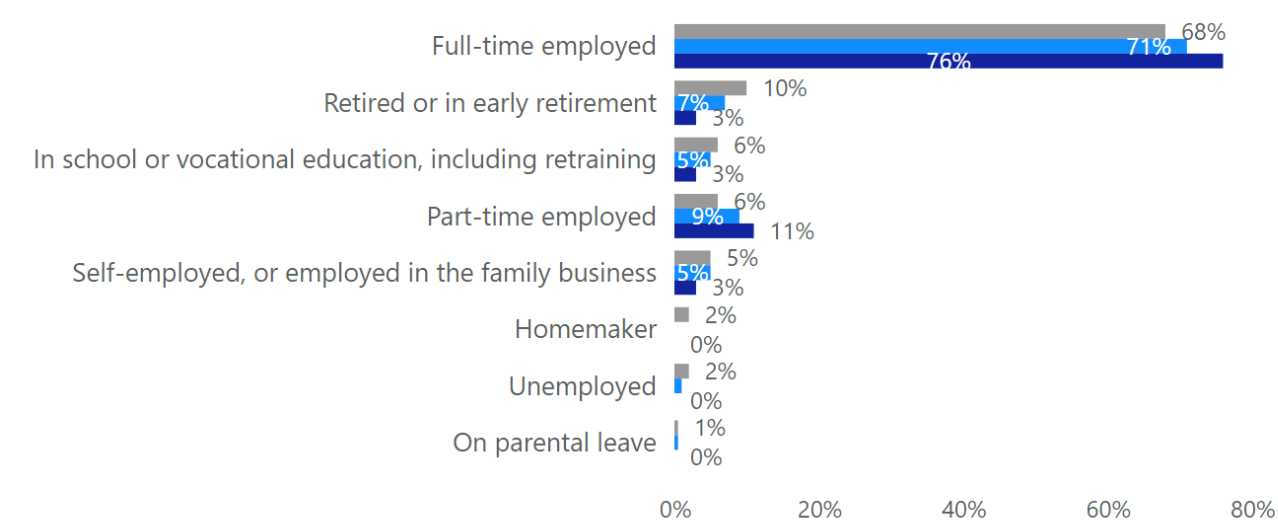
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Employment

Visitors with overnight

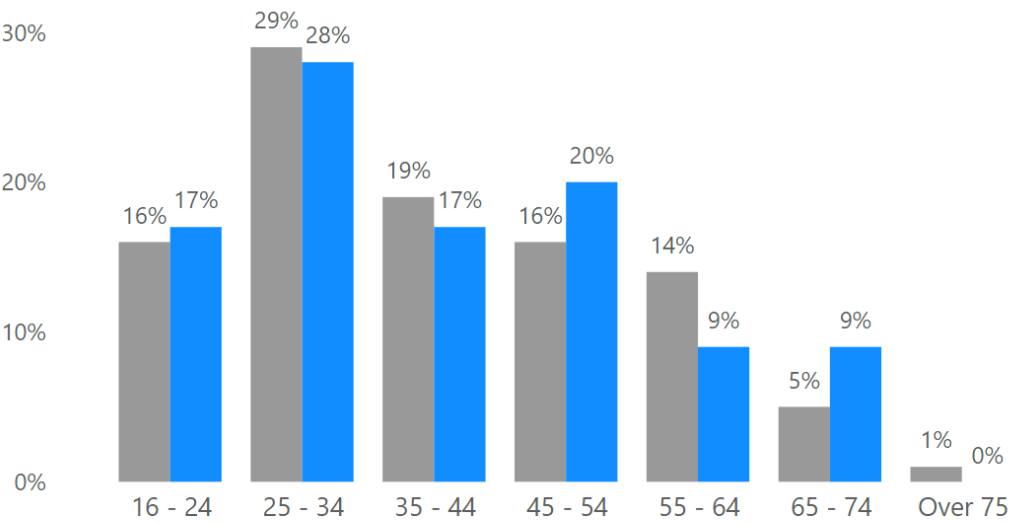
● All Inbound ● Hiking (holiday trip) ● Hiking (main holiday type)



Age

Same-day visitors

● All Inbound ● Hiking (excursion type)

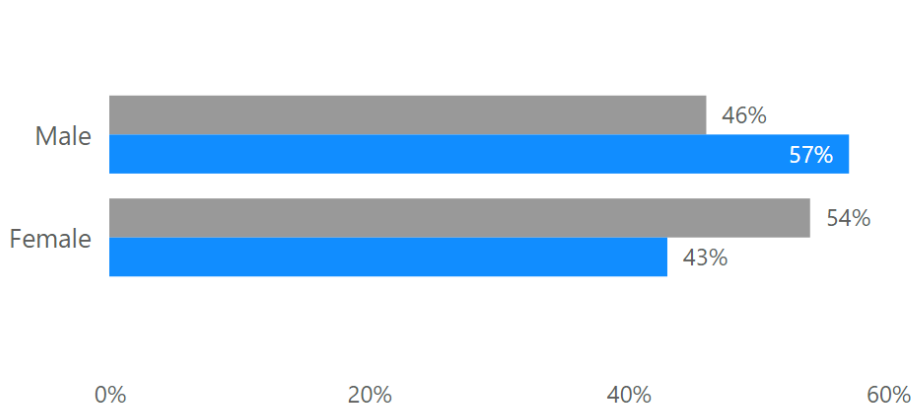


- For same-day visitors, the gender ratio is inverse for hiking visitors in comparison to all excursionists, and also to overnight hiking visitors.

Gender

Same-day visitors

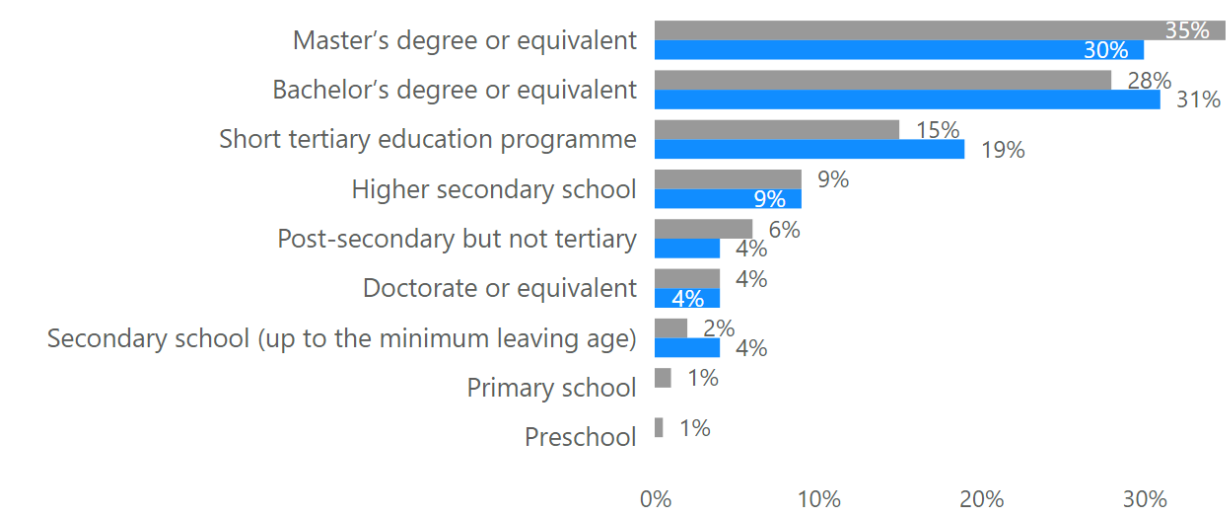
● All Inbound ● Hiking (excursion type)



Education

Same-day visitors

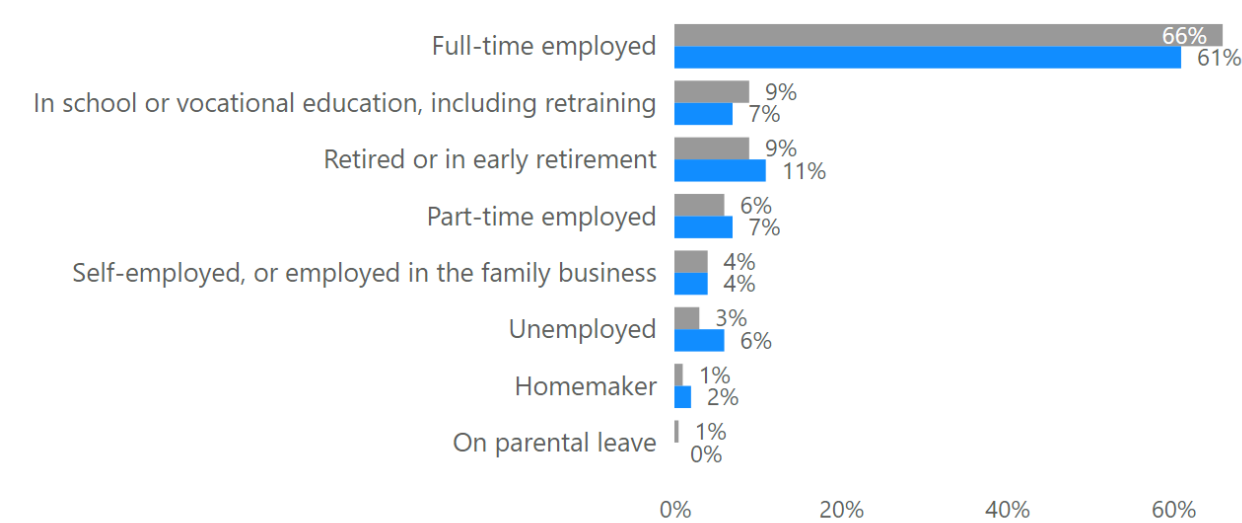
● All Inbound ● Hiking (excursion type)



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
	19	26	17%	22%	1,1
	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
	19	20	17%	27%	0,6
	16	20	19%	24%	0,8
	15	20	15%	21%	1,1
	12	20	29%	33%	2,9

- Italy, the Netherlands and Belgium rank highest in theme interest for hiking (see previous slide)
- In addition, these countries also rank highest in the perceived theme competence of Luxembourg in regard of hiking.

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

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.



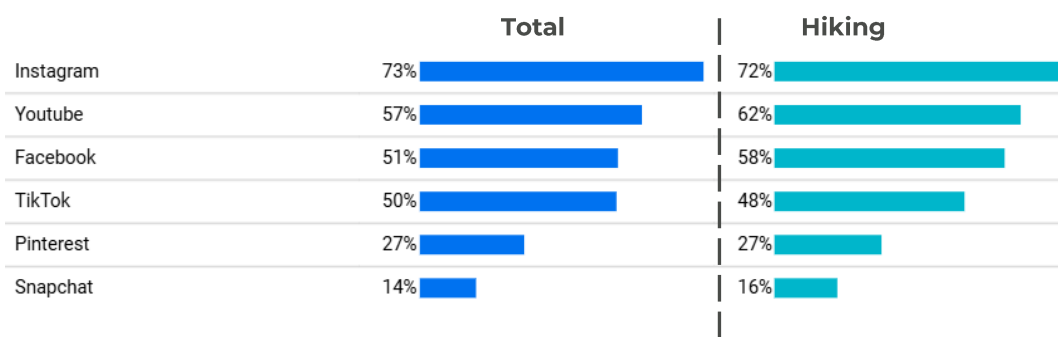
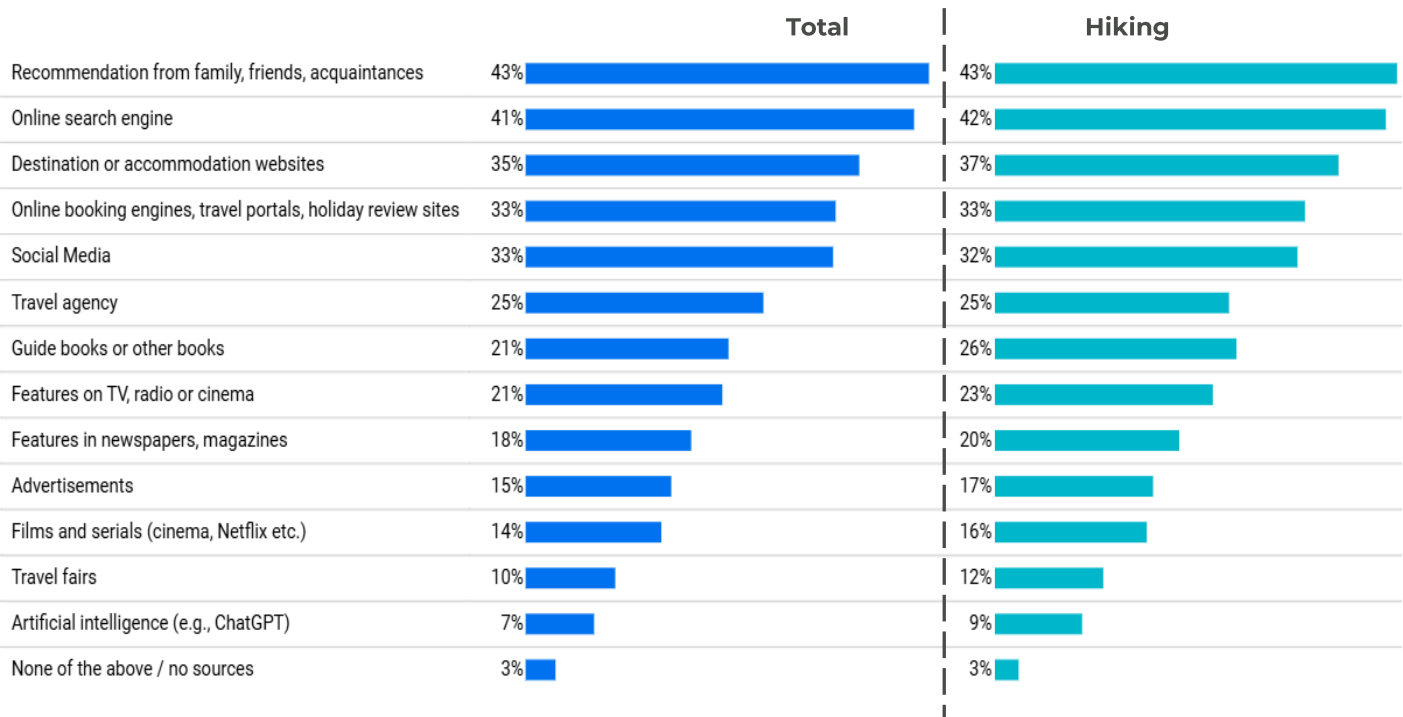
Trip organisation and preferences of Hiking segment

Trip organisation and preferences (1)

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

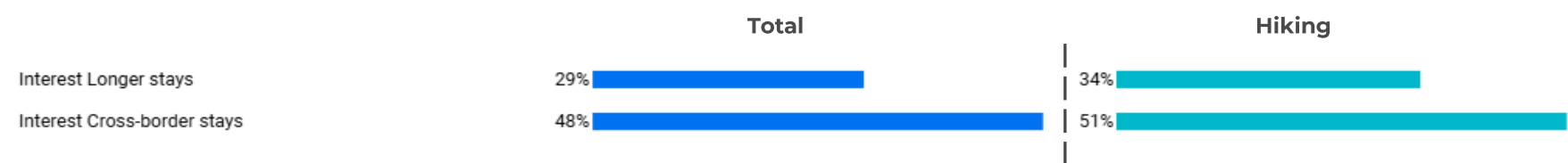


Preferred sources of travel inspiration



- 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)

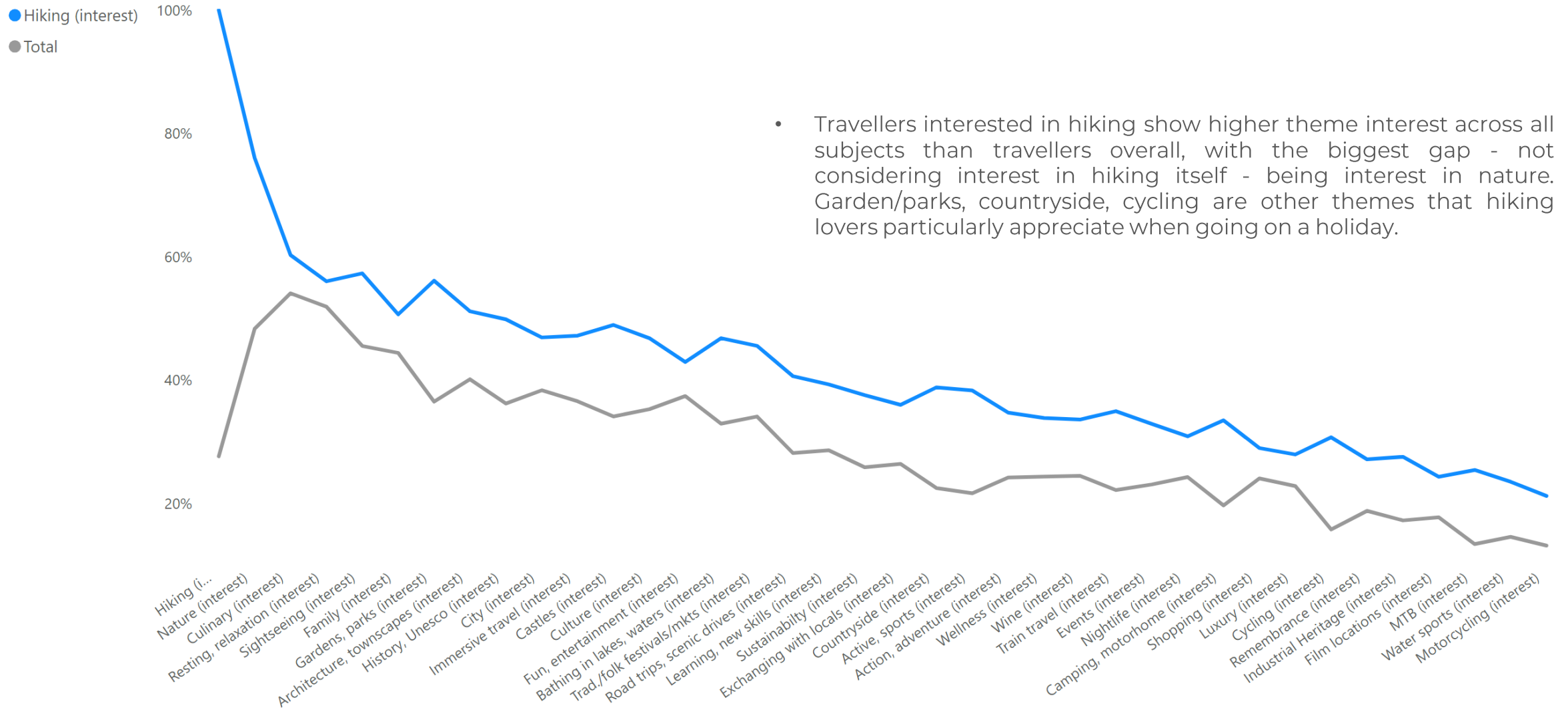


Trip organisation and preferences (2)

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



General theme interest (when going on a holiday) :
other themes that travellers interested in hiking are also interested in, vs. all travellers

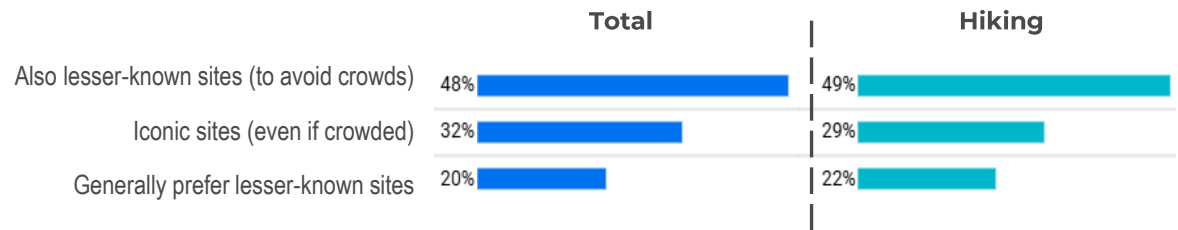


Trip organisation and preferences (3)

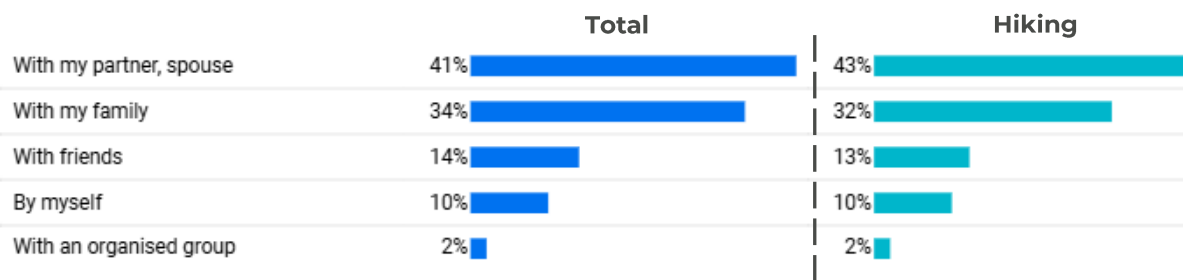
— Average **European source markets**, total vs. travellers interested in hiking



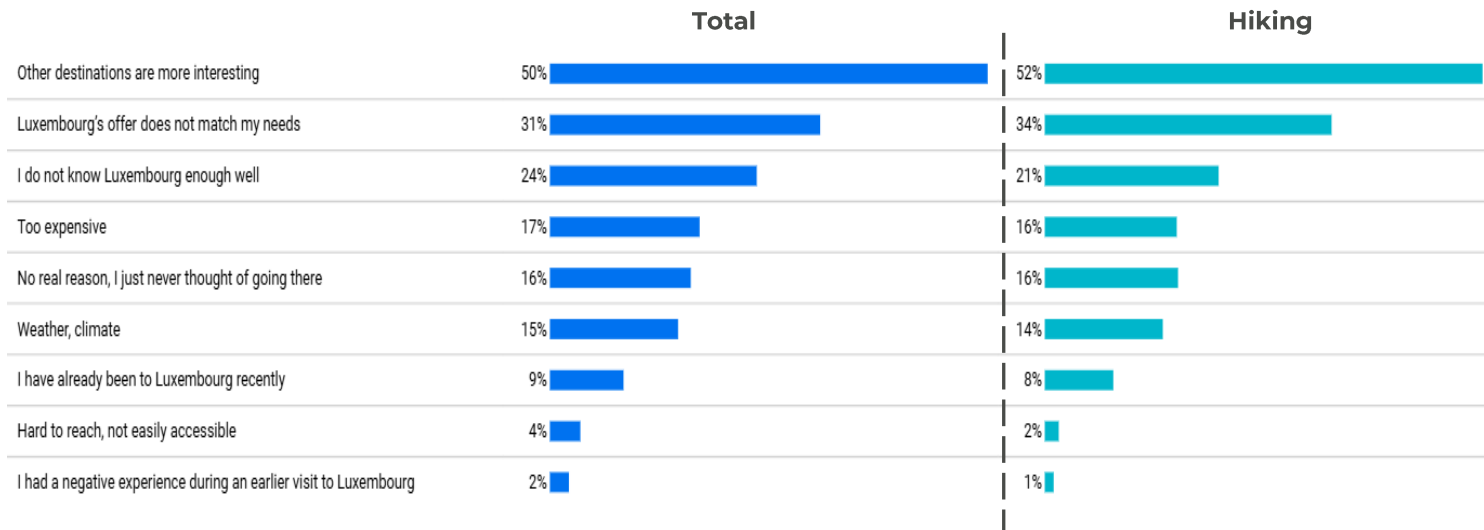
General preference for visiting iconic vs. lesser-known sites



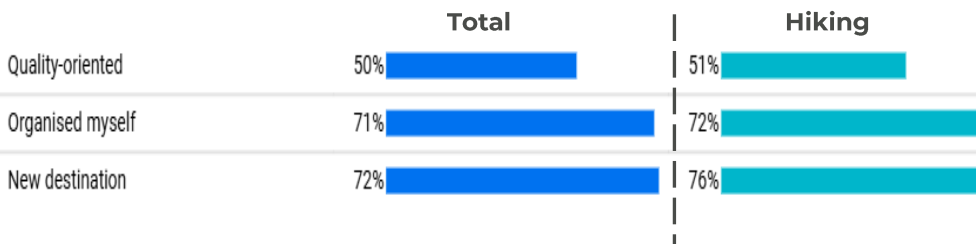
Travel party (*)



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



Your contact

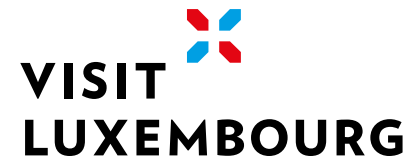


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