



Luxembourg for Tourism

Theme profile

MAIN TRAVEL MOTIVES : „immersive“, „sustainable“

2023



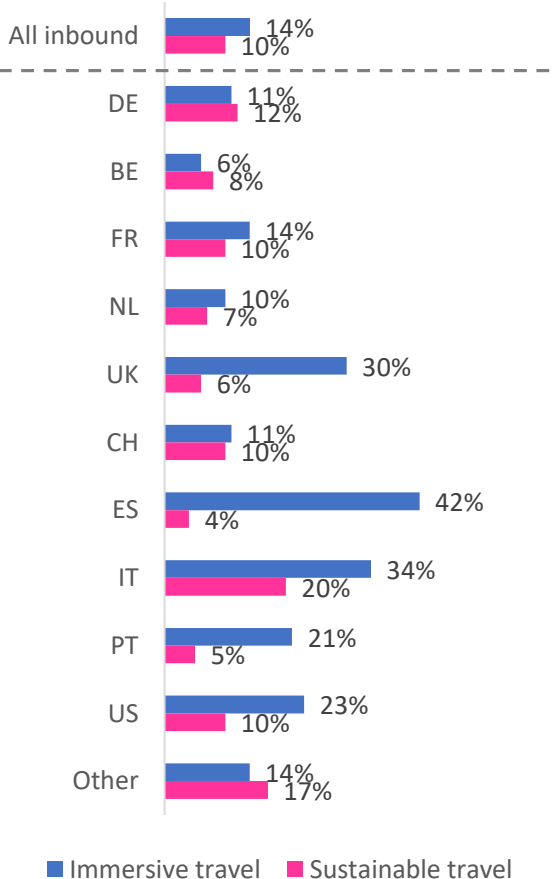
Market size of immersive and sustainable travel motives segments

Volume of leisure visitors with „immersive travel“ and „sustainable travel“ travel motives in Luxembourg

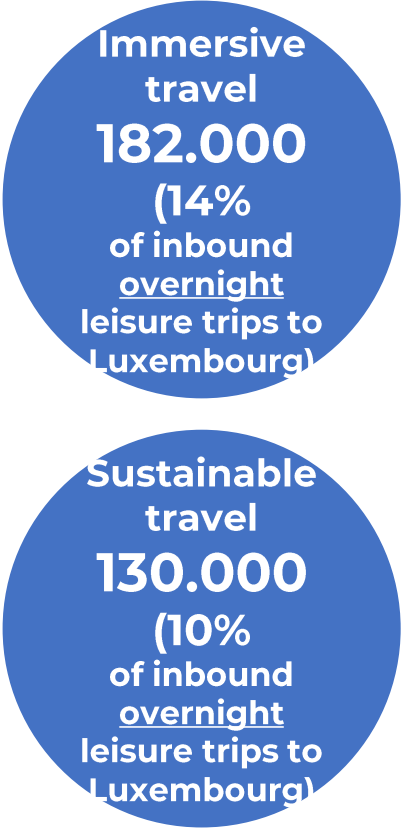
Overnight trips



Shares of leisure visitors with immersive / sustainable travel motives, by source markets



Number of overnight trips to Luxembourg (estimate 2023)



	Overnight trips: Immersive travel	Overnight trips: Sustainable travel
DE	21.000	23.000
BE	14.000	18.000
FR	18.000	13.000
NL	33.000	23.000
Other	96.000	53.000

Sources: LFT/Ilres Visitor Survey, 2020-2023; trip volumes are estimates based on World Travel Monitor/IPK International & Editus/LFT mobile phone data).



Travel behaviour of immersive and sustainable travellers in Luxembourg

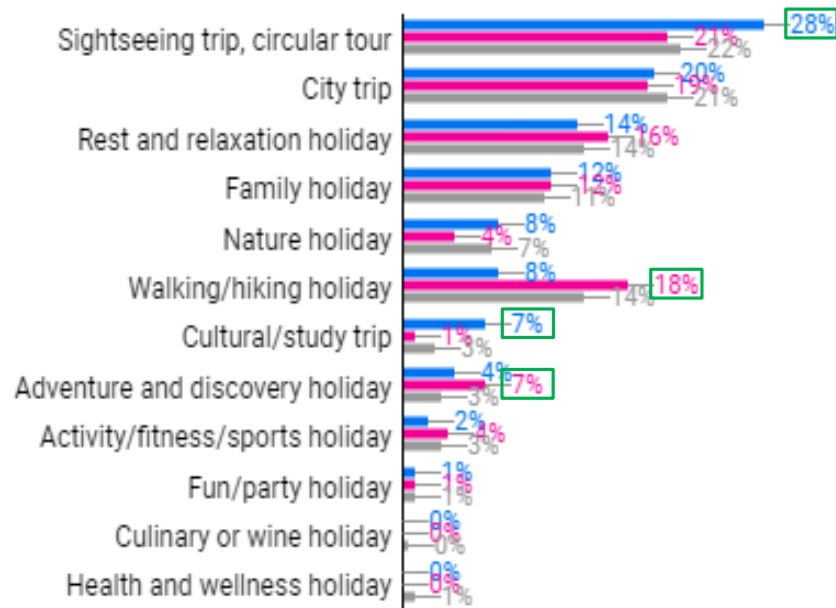


Holiday types

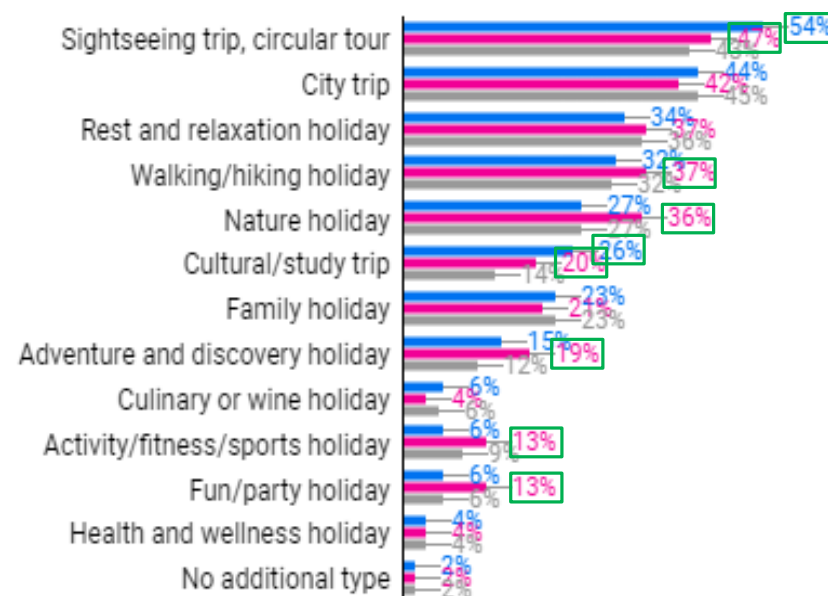
Inbound leisure visitors with overnight, 2020-2023



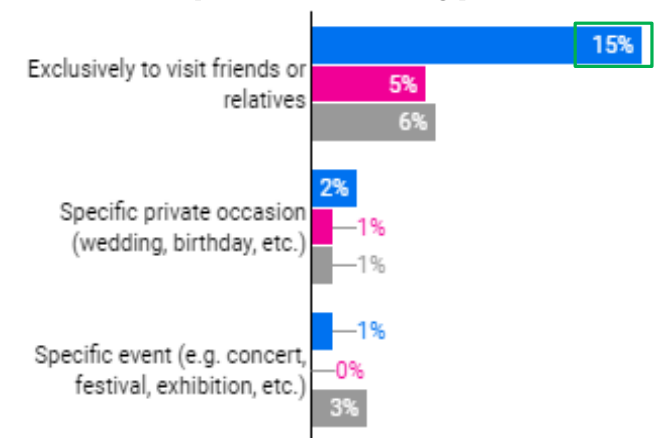
Main holiday types



Additional holiday types

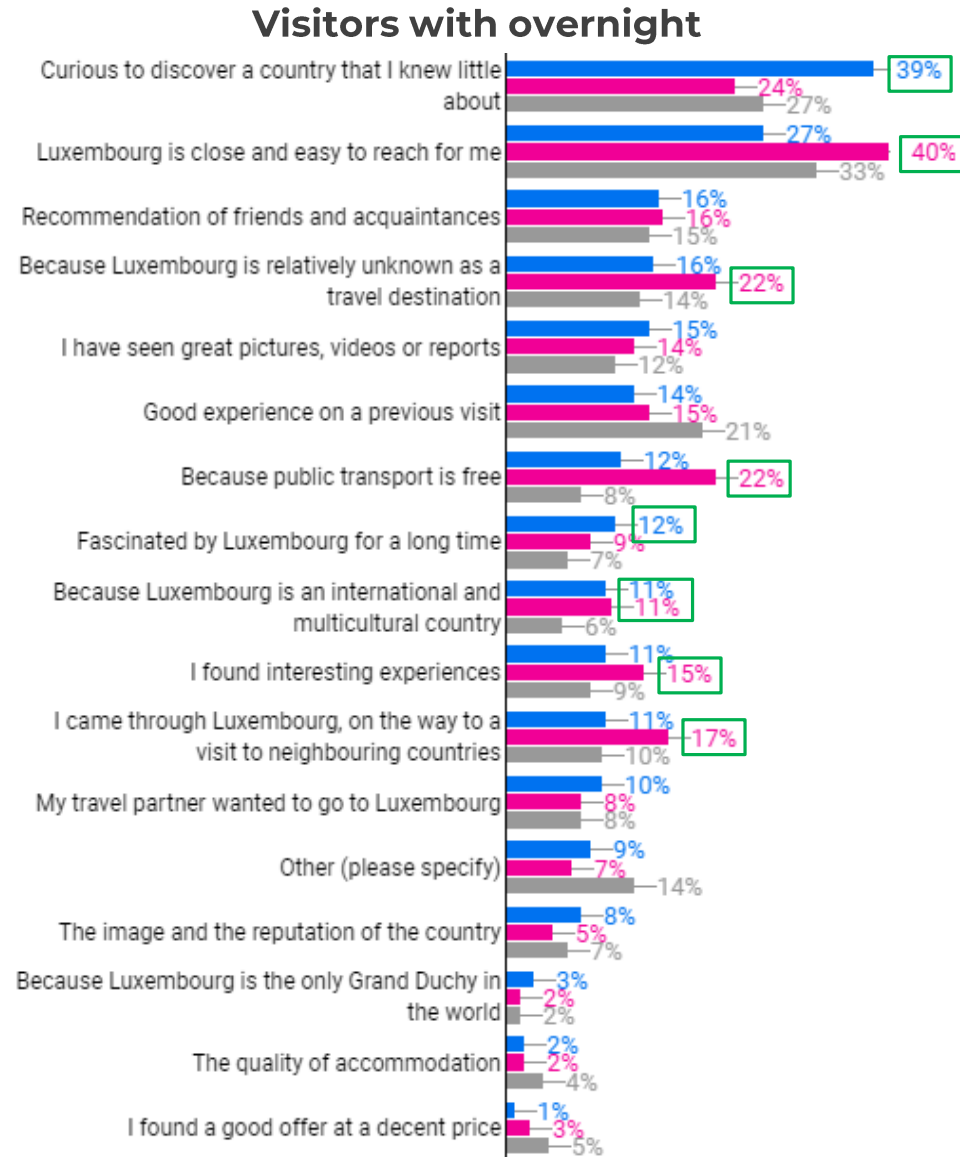
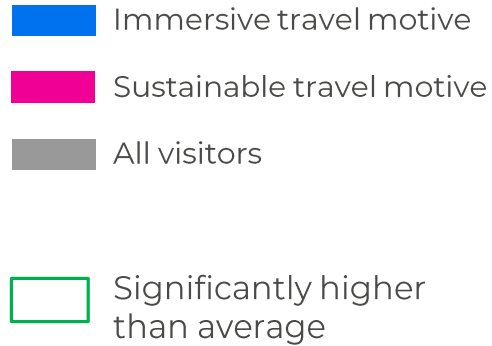


Main purpose of overnight trip (if not holiday)



Key decision criteria for choosing Luxembourg (*)

Inbound leisure visitors, 2020-2023



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

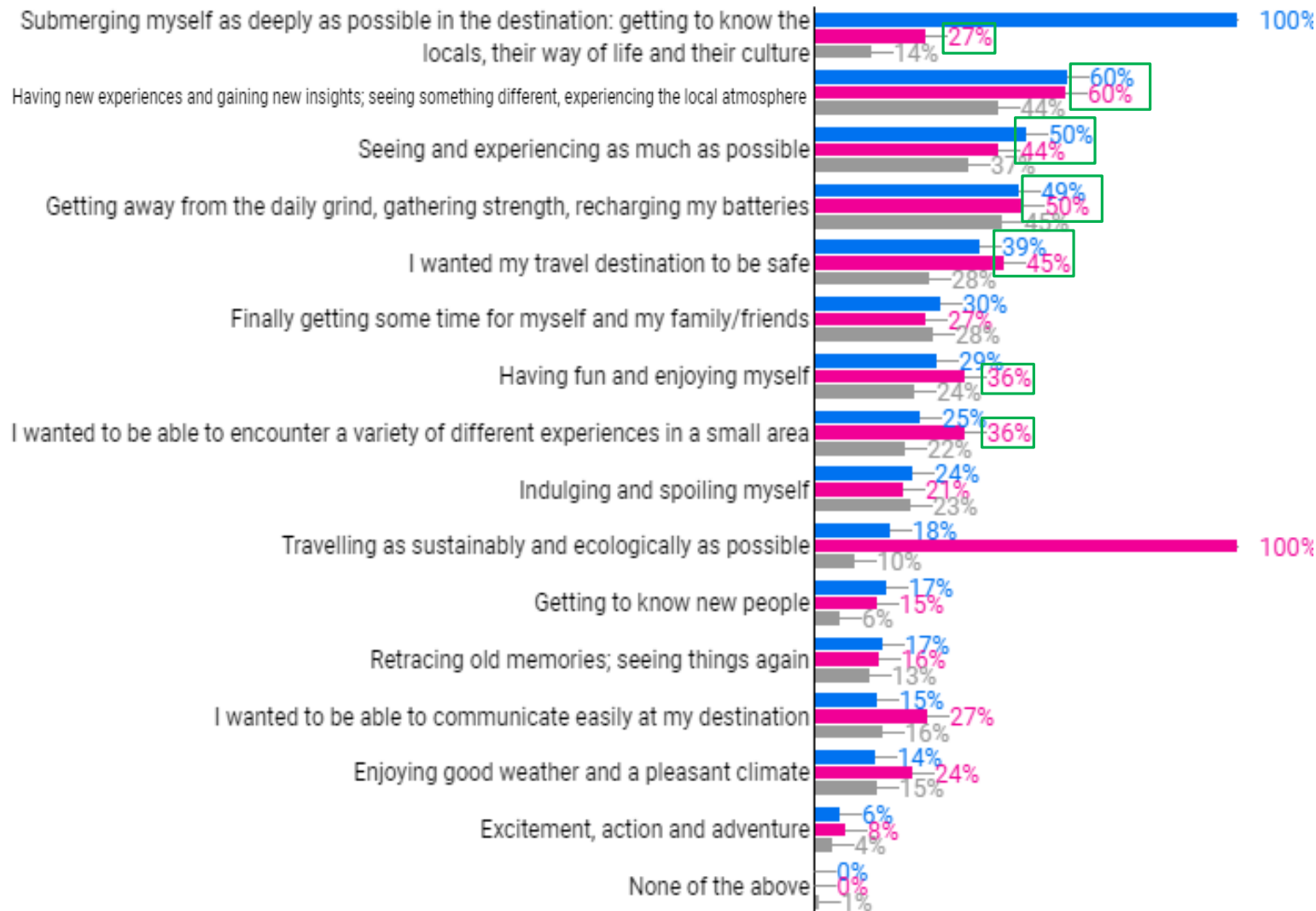
(*) Maximum 3 answers possible.

Key travel motives and emotions

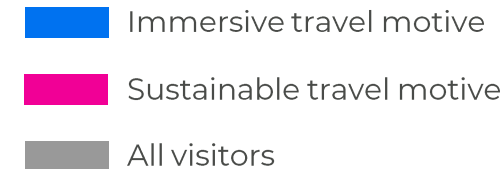
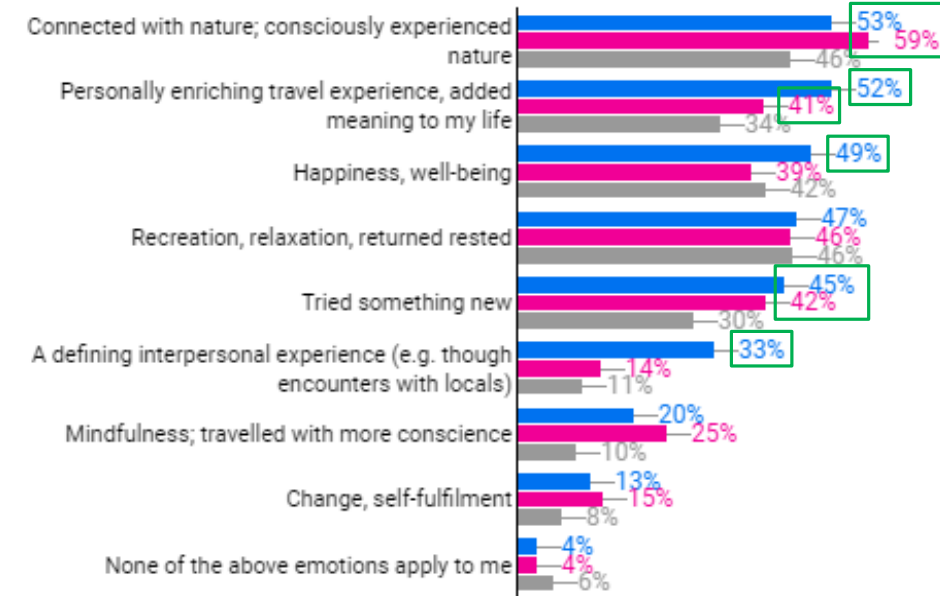
Inbound leisure visitors with overnight, 2020-2023



Travel motives



Emotions experienced during stay



Inspiration sources

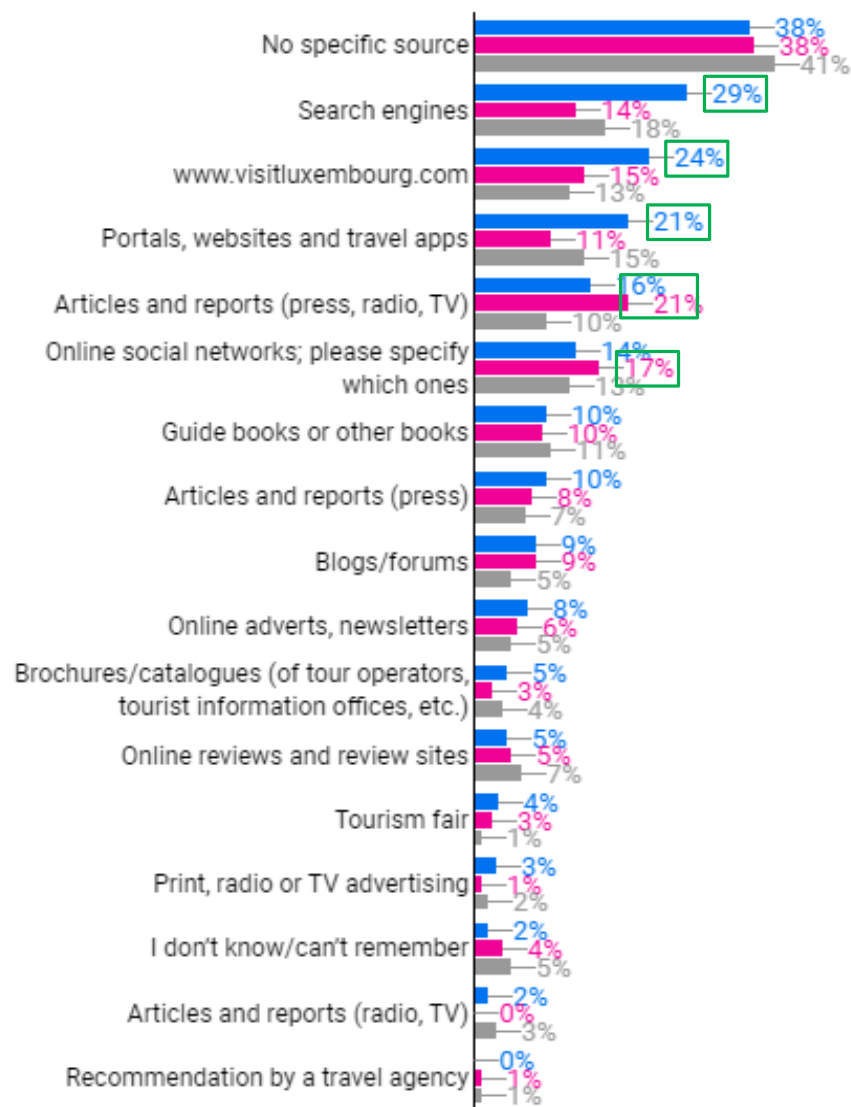
Inbound leisure visitors, 2020-2023



- Immersive travel motive
- Sustainable travel motive
- All visitors

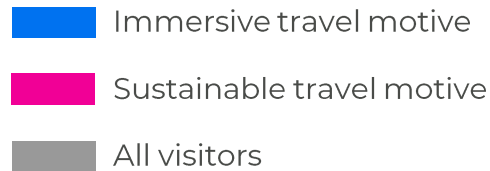
Significantly higher than average

Visitors with overnight

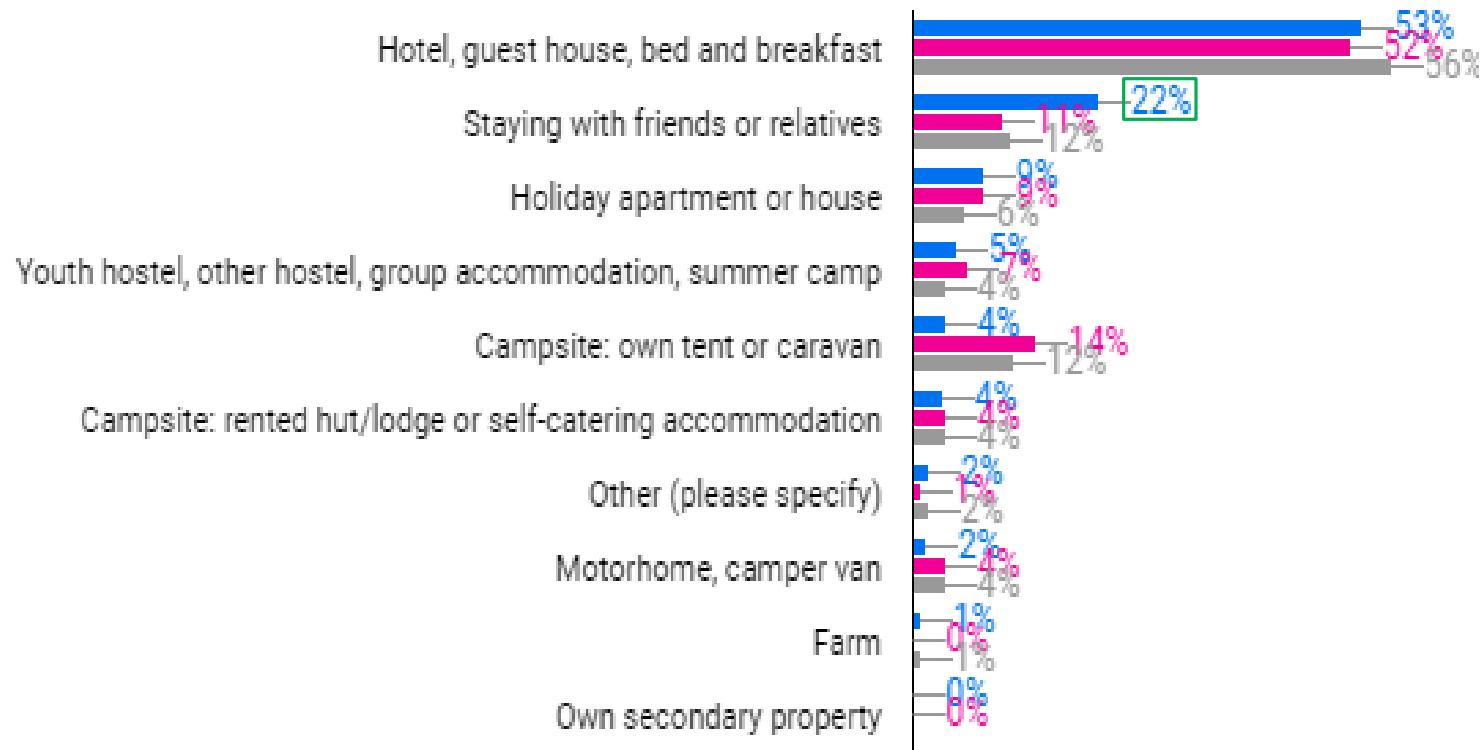


Type of accommodation, destination regions

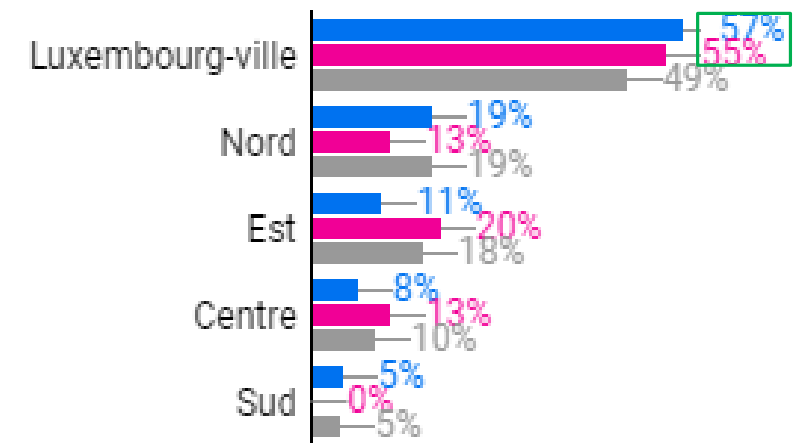
Inbound leisure visitors with overnight, 2020-2023



Type of accommodation



Destination region



Significantly higher than average

Target segments

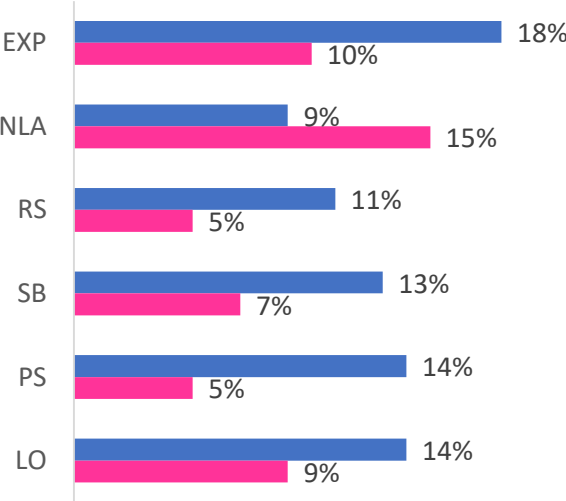
Inbound leisure visitors, 2020-2023



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

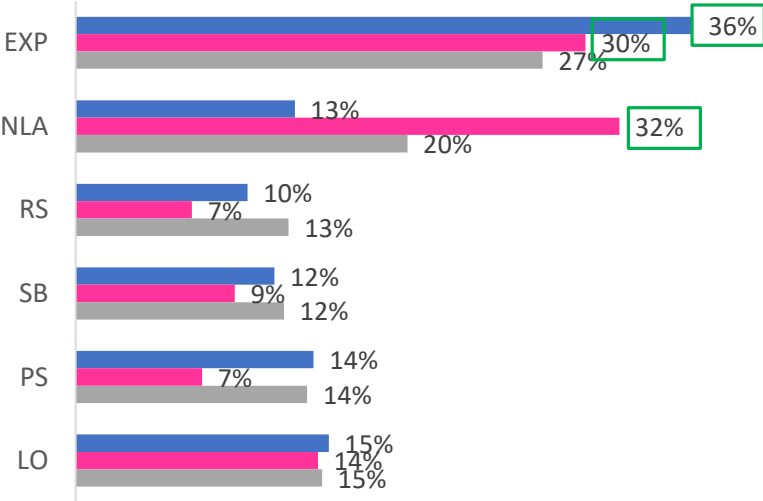
 Significantly higher
than average

Visitors with overnight



■ Immersive travel ■ Sustainable travel

Reading example: 18% of Explorers have immersive travel as a main motive



■ Immersive travel ■ Sustainable travel ■ All visitors

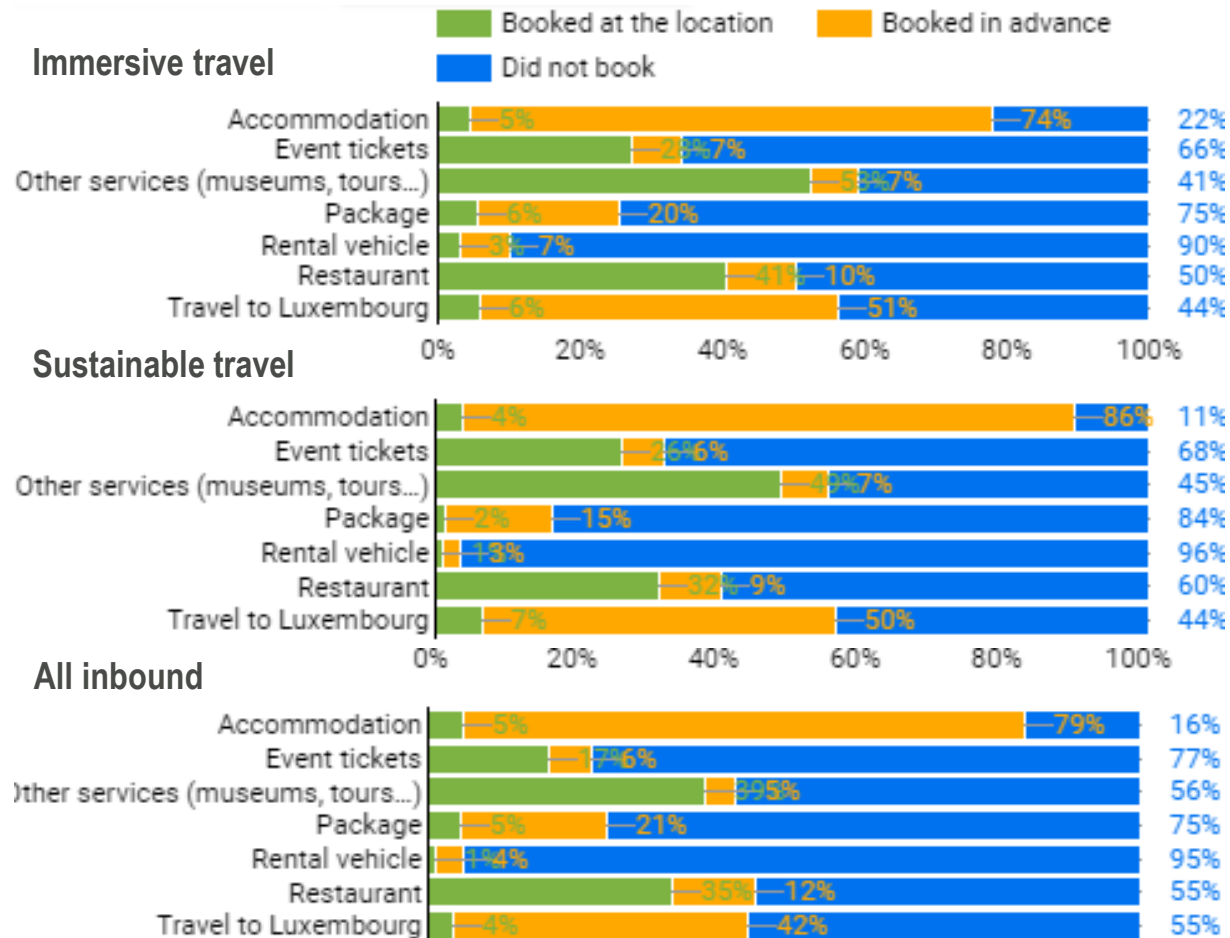
Reading example: 36% of visitors with immersive travel as a motive are Explorers

Booking behaviour

Inbound leisure visitors with overnight, 2020-2023

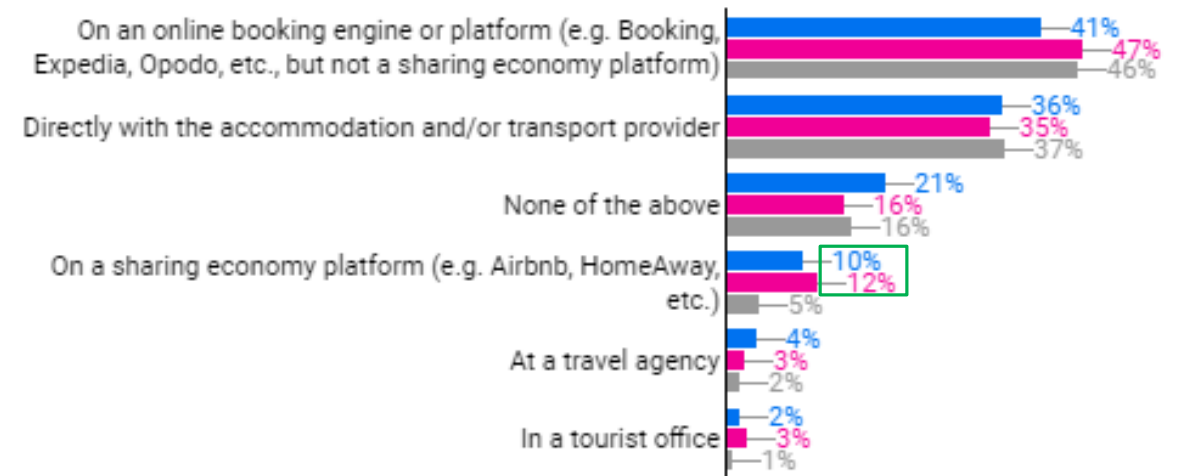


Booking of travel items



- Immersive travel motive
- Sustainable travel motive
- All visitors

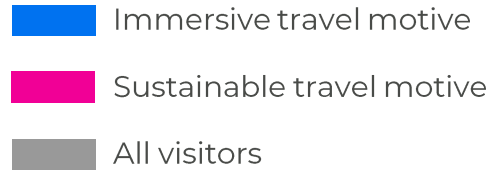
Booking channels



Significantly higher than average

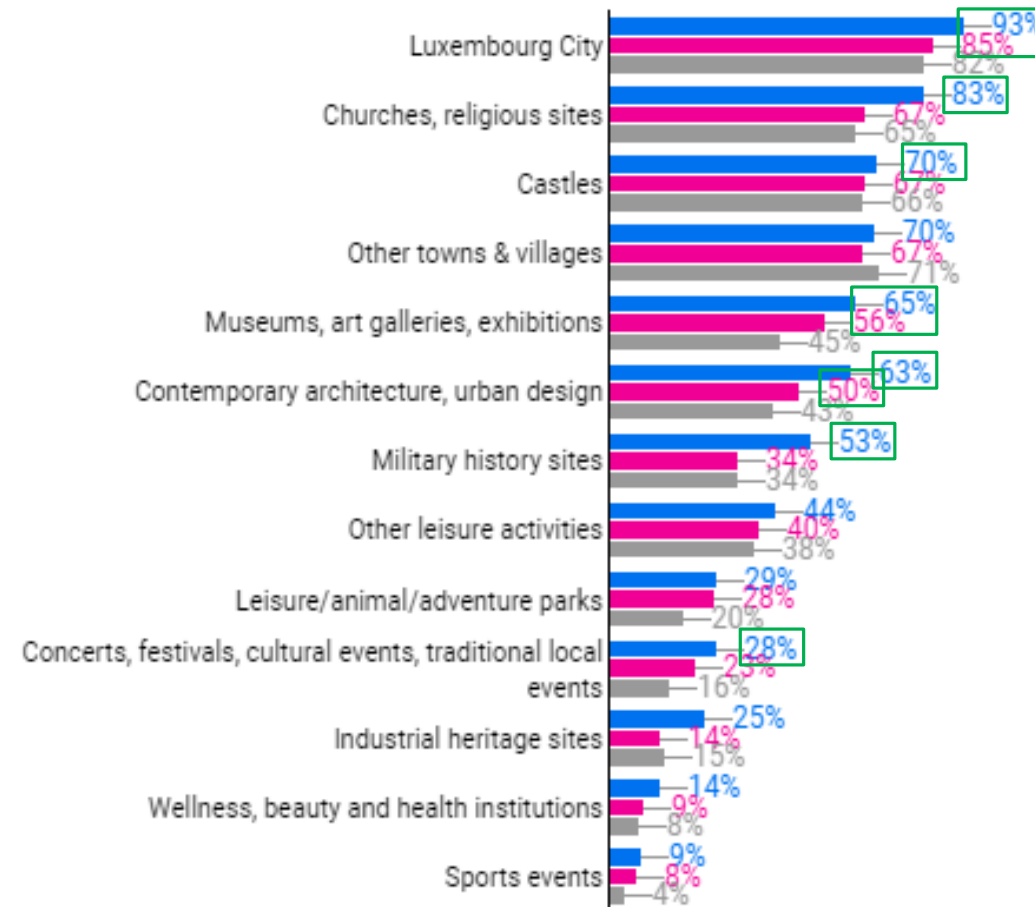
Places visited during leisure stays

Inbound leisure visitors, 2020-2023



Significantly higher than average

Visitors with overnight



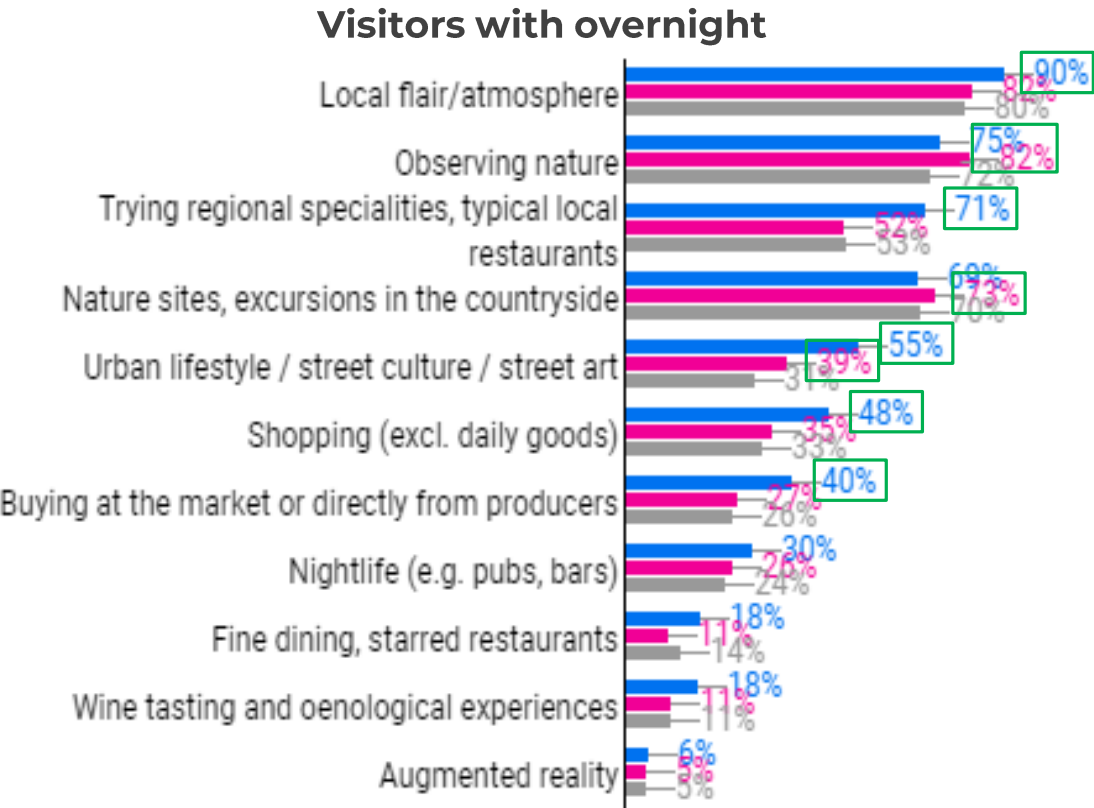
Non-sporting activities undertaken during leisure stays

Inbound leisure visitors, 2020-2023



- Immersive travel motive
- Sustainable travel motive
- All visitors

Significantly higher than average



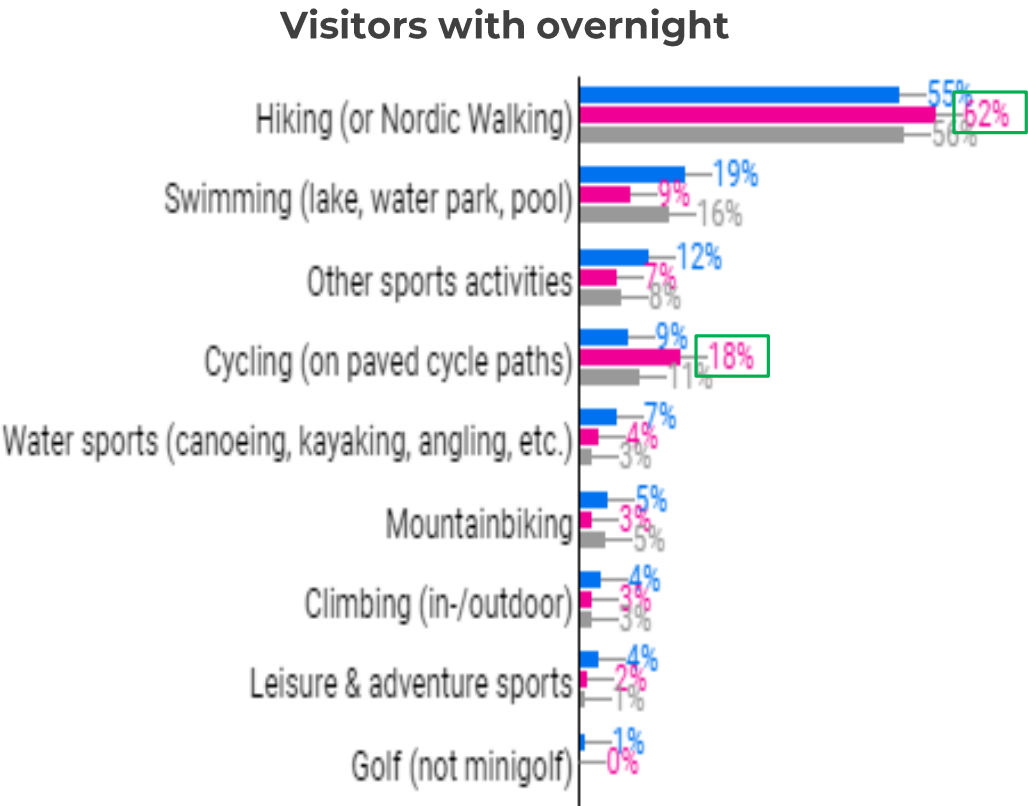
Sporting activities undertaken during leisure stays

Inbound leisure visitors, 2020-2023



- Immersive travel motive
- Sustainable travel motive
- All visitors

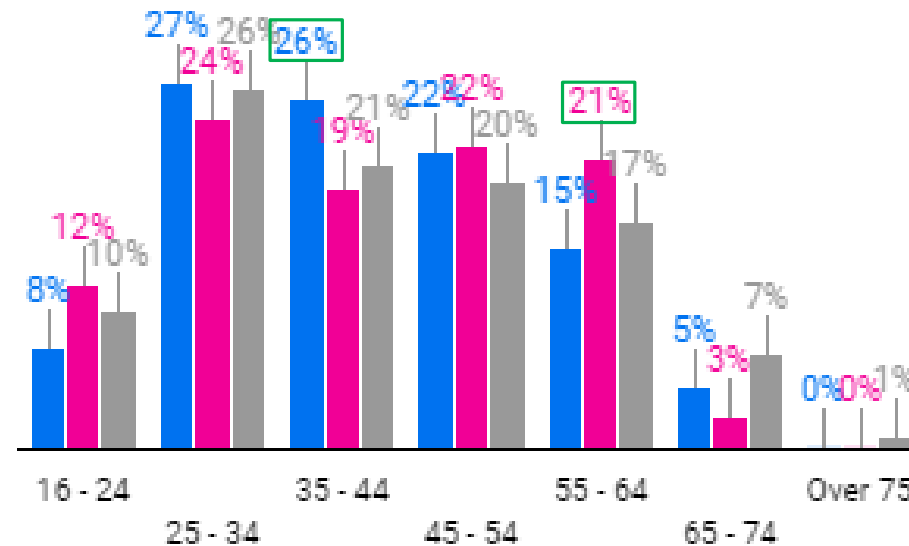
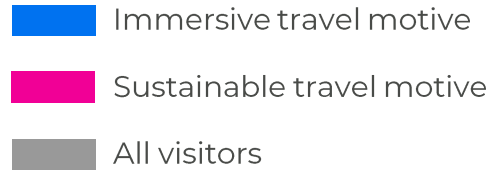
Significantly higher than average





Age groups

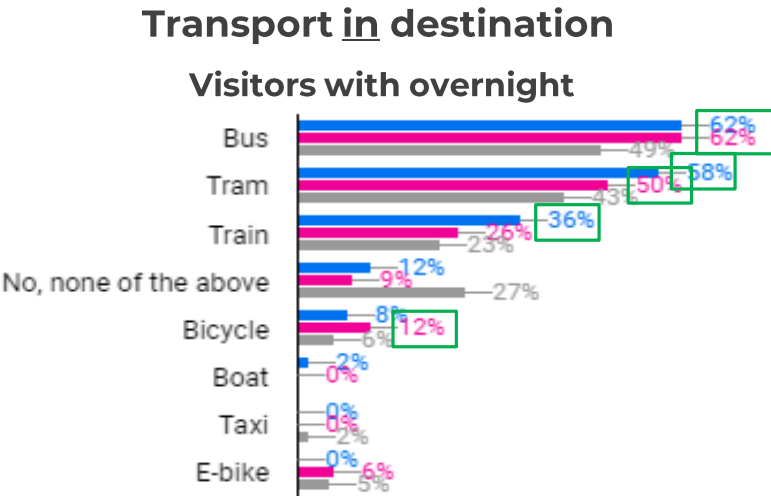
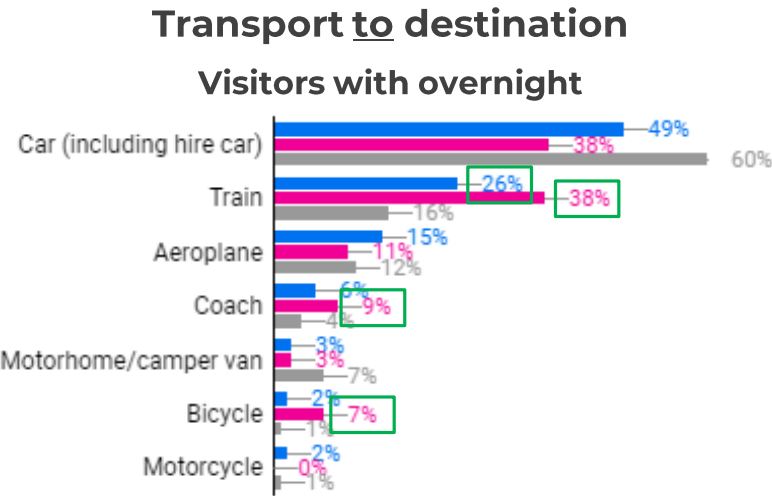
Inbound leisure visitors, 2020-2023



Significantly higher than average

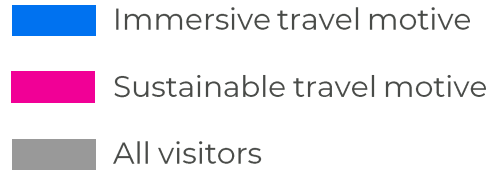
Transport (to and in destination)

Inbound leisure visitors, 2020-2023

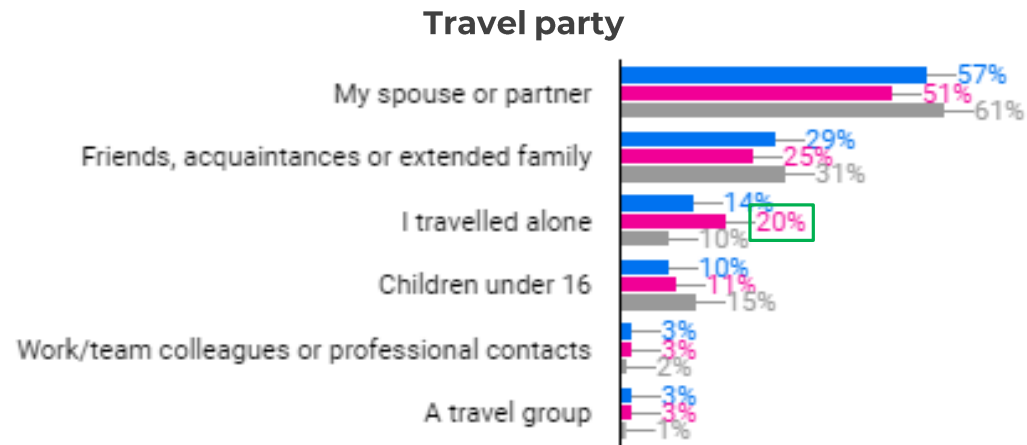


Travel party, repeat visits and cross-border trips

Inbound leisure visitors with overnight, 2020-2023



Significantly higher than average



First-time visitors

Immersive travel
62%
(All inbound 61%)

Sustainable travel
60%
(All inbound 61%)

Visitors spending nights in Luxembourg and abroad during same trip

Immersive travel
41%
(All inbound 36%)

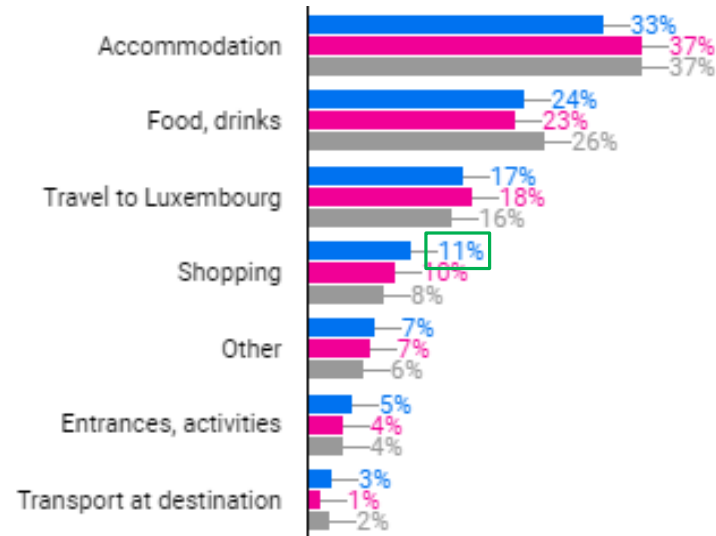
Sustainable travel
49%
(All inbound 36%)

Expenditure, length of stay and quality vs price orientation

Inbound leisure visitors with overnight, 2020-2023



Breakdown of expenditure by categories



Length of stay

Immersive travel
4.1
nights
(All inbound 3.8)

Sustainable travel
3.4
nights
(All inbound 3.8)

Spend/pers./trip

Immersive travel
727€
(All inbound 486€)

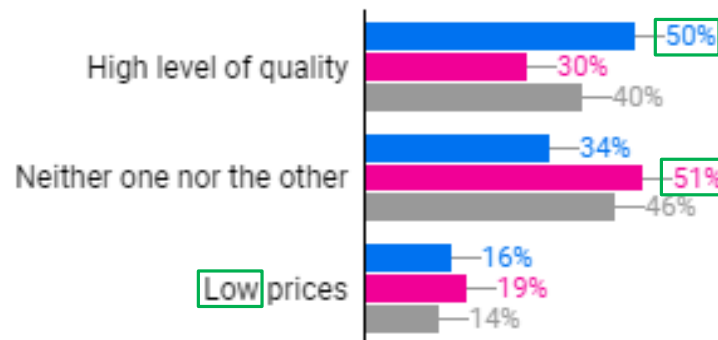
Sustainable travel
387€
(All inbound 486€)

Spend/pers./day

Immersive travel
178€
(All inbound 130€)

Sustainable travel
113€
(All inbound 130€)

Quality vs. price orientation

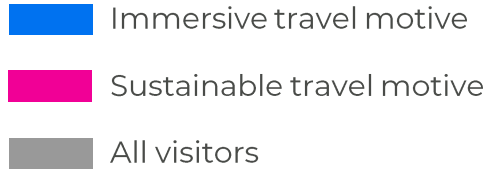


- Immersive travel motive
- Sustainable travel motive
- All visitors

Significantly higher than average

Actions during stay (sustainable and services)

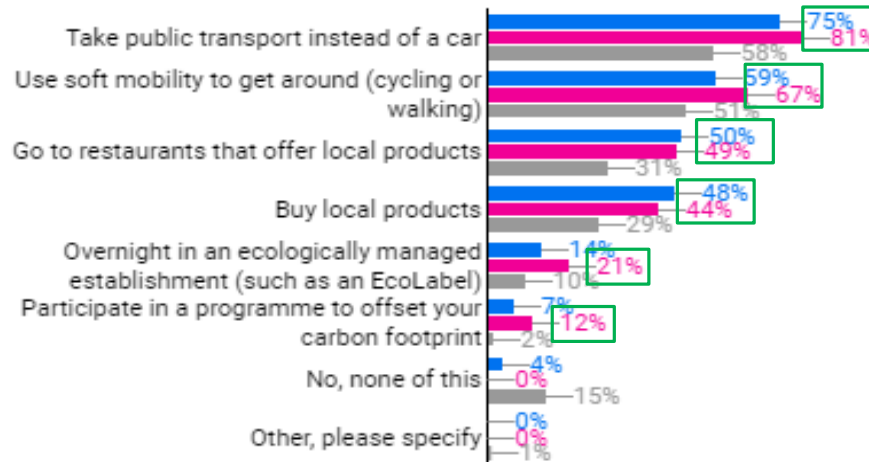
Inbound leisure visitors, 2020-2023



Significantly higher than average

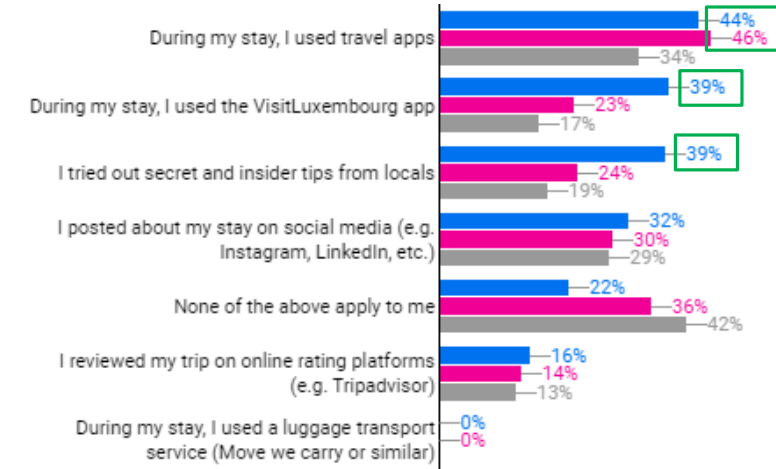
Sustainable actions during stay

Visitors with overnight



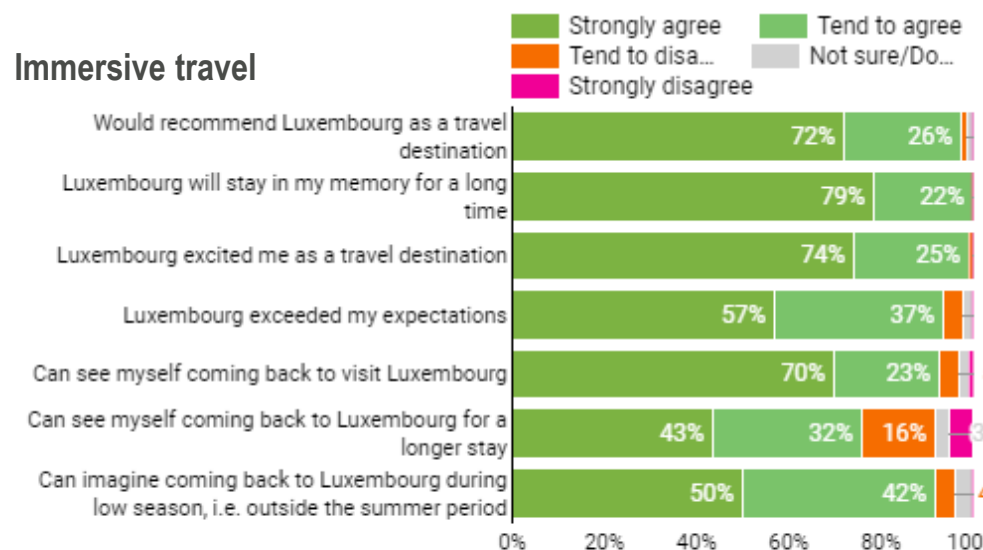
Services used during stay

Visitors with overnight

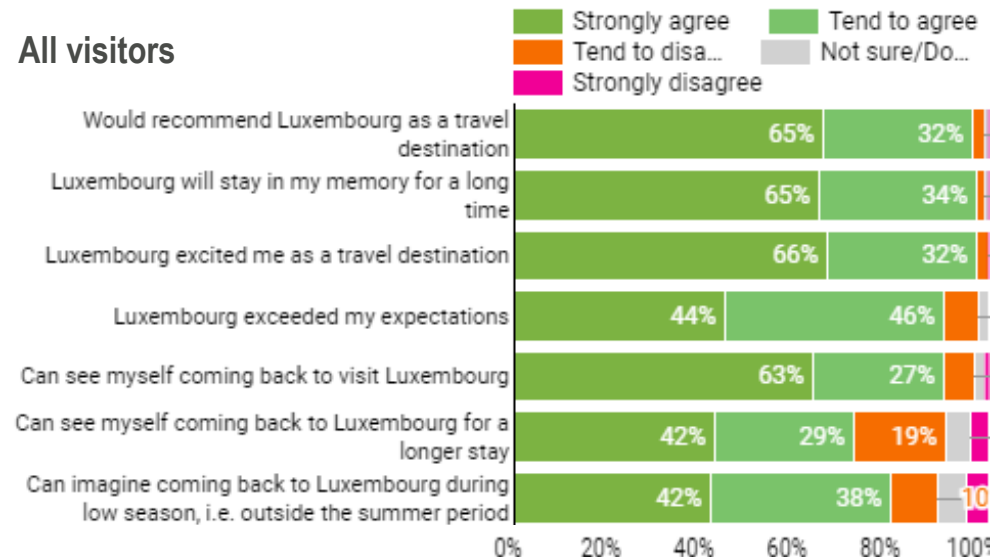
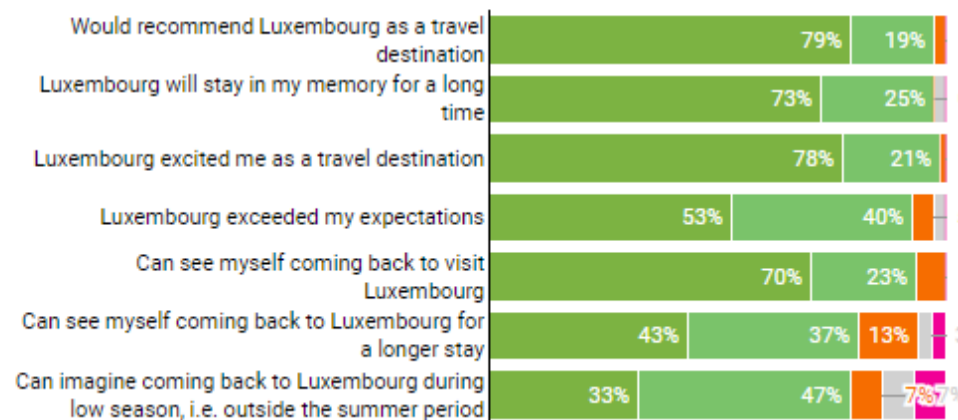


Visitor satisfaction and recommendation

Inbound leisure visitors with overnight, 2020-2023



Sustainable travel

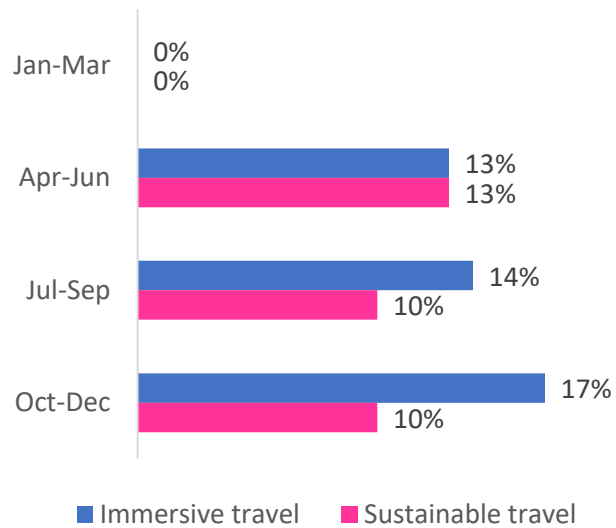


Trip seasonality

Inbound leisure visitors, 2020-2023



Visitors with overnight












**Destination Awareness &
Growth Potential for
Immersive & Sustainable travel segments**

General theme interest - Immersive travel

















	Rank (*)	Total themes in survey	% „very interested“	% „interested“	% „interested“, Ø all themes	„Interested“, population, mn (**)
Average Europe	6	33	-	67%	54%	-
	4	33	40%	69%	52%	41,3
	10	33	29%	61%	53%	7,7
	4	33	38%	68%	54%	4,5
	5	33	42%	69%	53%	4,6
	8	33	28%	63%	51%	5,2
	3	33	38%	70%	55%	32,7
	6	33	32%	68%	53%	32,7

(*) Rank among all surveyed themes in respective source market.
Based on % “interested” in theme.
(**) Aged 18-74.

General theme interest - Sustainable travel












	Rank (*)	Total themes in survey	% „very interested“	% „interested“	% „interested“, Ø all themes	„Interested“, population, mn (**)
Average Europe	15	33	-	56%	54%	-
	16	33	24%	53%	52%	31,7
	18	33	21%	50%	53%	6,3
	18	33	22%	55%	54%	3,6
	16	33	23%	55%	53%	3,6
	16	33	18%	54%	51%	4,4
	14	33	24%	61%	55%	28,6
	14	33	24%	56%	53%	26,9
	9	20	-	52%	40%	22,2
	9	20	-	53%	44%	18,3
	10	21	-	51%	47%	14,3
	6	24	35%	65%	54%	2,3
	12	24	22%	51%	51%	2,1
	5	24	24%	63%	52%	4,5
	8	24	47%	72%	60%	5,4

(*) Rank among all surveyed themes in respective source market.
Based on % “interested” in theme.
(**) Aged 18-74.

Luxembourg's perceived theme competence – Sustainable travel



	Rank (*)	Total themes in survey	% „very suitable“	% „very suitable“, Ø all themes	„very suitable“, population, mn (**)
Average Europe	18	26	19%	24%	-
	18	26	18%	23%	10,6
	21	26	16%	26%	2,1
	23	26	15%	22%	1,0
	20	26	18%	23%	1,2
	21	26	18%	25%	1,5
	20	26	16%	22%	7,4
	21	26	15%	22%	7,4
	13	20	23%	27%	0,8
	14	20	20%	24%	0,8
	13	20	18%	21%	1,3
	10	20	33%	33%	2,5

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

(*) Rank among all surveyed themes in respective source market.
Based on % “suitable” for theme.
(**) Aged 18-74.

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



– Sustainable travel (Ø DE-NL-CH-AT-BE-FR-UK)

LFT target segments

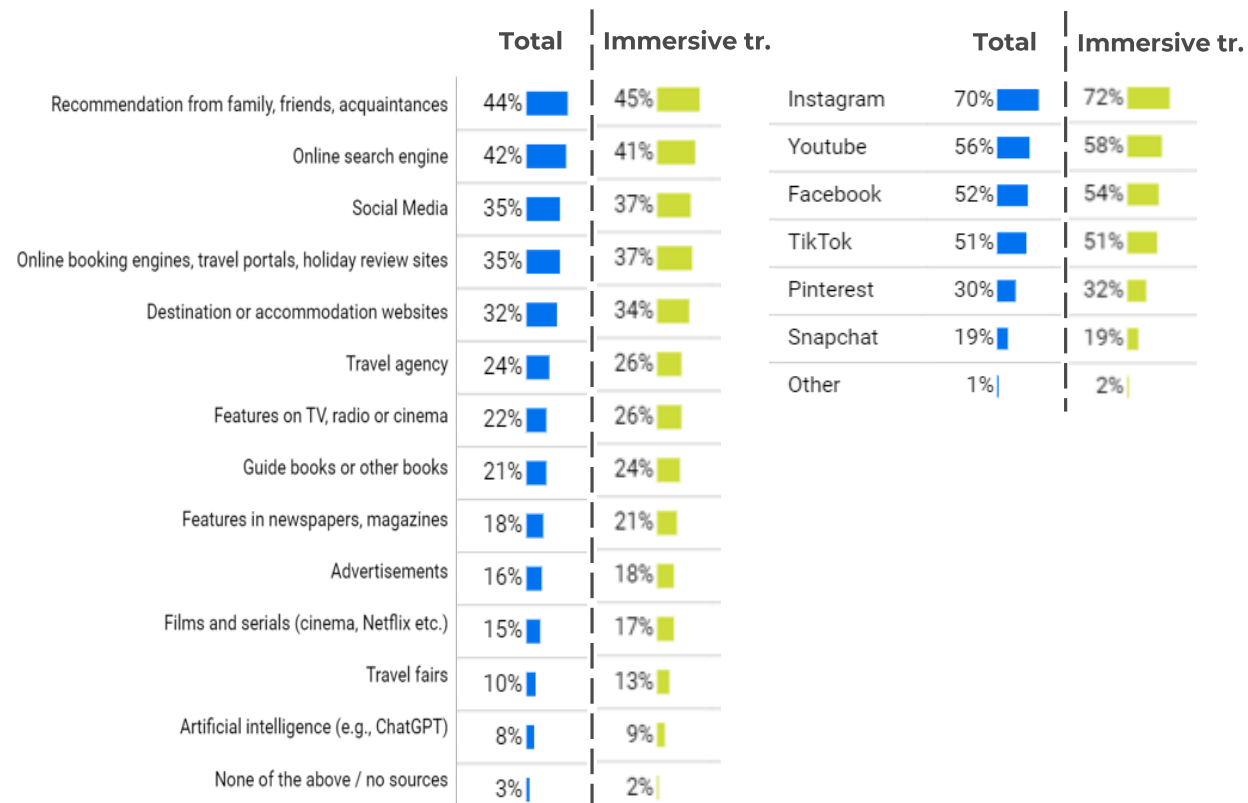
	„Interested“, Rank	<i>Total themes in survey</i>	„Very suitable“, Rank	<i>Total themes in survey</i>
EXP	11	26	17	26
NLA	7	26	19	26
RS	10	26	18	26
SB	11	26	20	26
PS	11	26	14	26
LO	10	26	19	26

Trip organisation and preferences (1) (*)

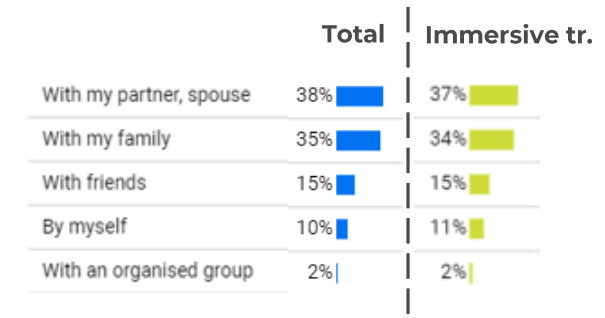
— Average **European source markets**, total vs. travellers interested in immersive travel



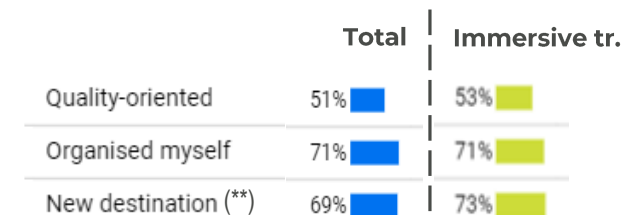
Preferred sources of travel inspiration



Travel party



Quality orientation, self-organisation, new destination



(*) During last outbound holiday trip.

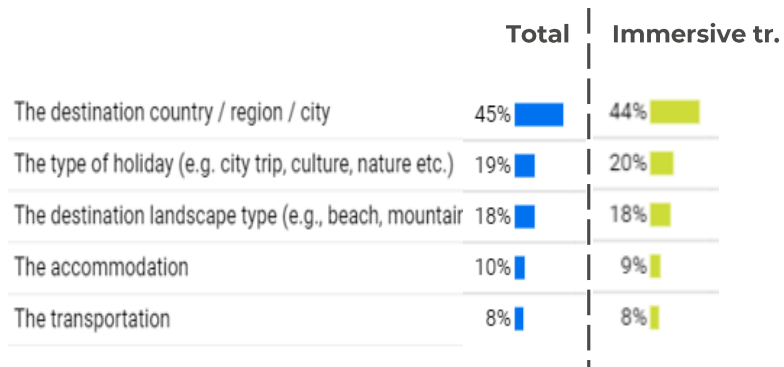
(**) Travelled to a destination never visited before.

Trip organisation and preferences (2) (*)

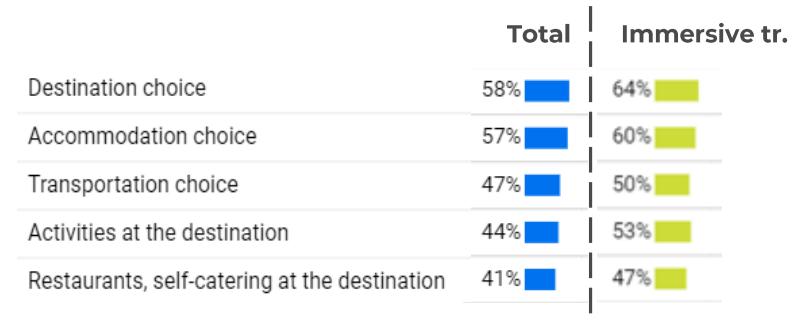
— Average **European source markets**, total vs. travellers interested in immersive travel



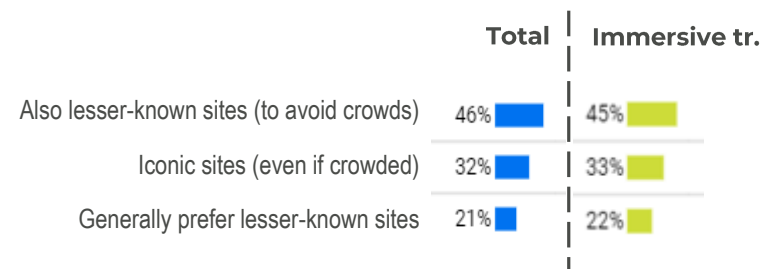
Aspects of trip first decided



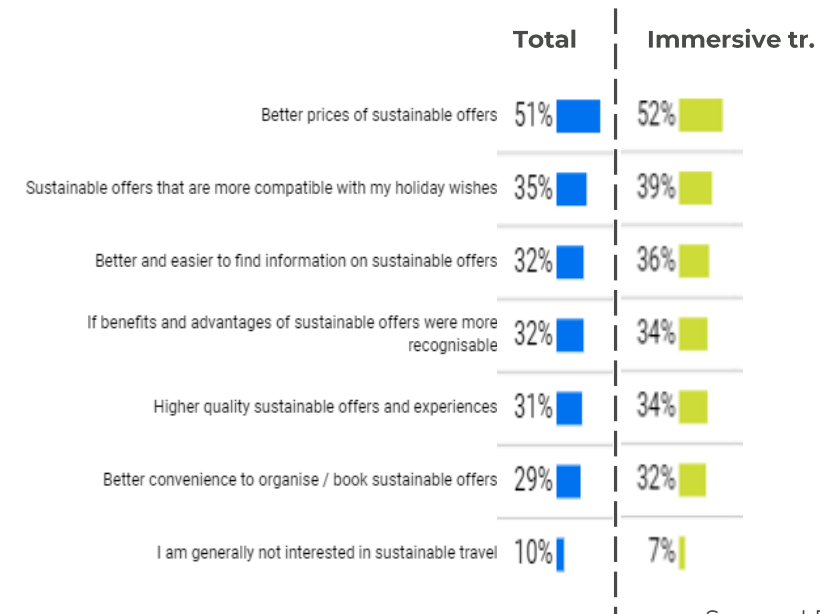
Importance of sustainability for choice of trip components



General preference for visiting iconic vs. lesser-known sites



Aspects that could convince travellers to pay more attention to sustainability at future travellings



Source: LFT Brand & Potential Studies.

(*) During last outbound holiday trip.

Trip organisation and preferences (1) (*)

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



Preferred sources of travel inspiration

	Total	Sustain.
Recommendation from family, friends, acquaintances	44%	43%
Online search engine	42%	39%
Social Media	35%	34%
Online booking engines, travel portals, holiday review sites	35%	36%
Destination or accommodation websites	32%	37%
Travel agency	24%	29%
Features on TV, radio or cinema	22%	25%
Guide books or other books	21%	25%
Features in newspapers, magazines	18%	22%
Advertisements	16%	20%
Films and serials (cinema, Netflix etc.)	15%	21%
Travel fairs	10%	15%
Artificial intelligence (e.g., ChatGPT)	8%	13%
None of the above / no sources	3%	1%

	Total	Sustain.
Instagram	70%	70%
Youtube	56%	61%
Facebook	52%	58%
TikTok	51%	56%
Pinterest	30%	37%
Snapchat	19%	26%
Other	1%	1%

Travel party

	Total	Sustain.
With my partner, spouse	38%	35%
With my family	35%	37%
With friends	15%	15%
By myself	10%	10%
With an organised group	2%	3%

Quality orientation, self-organisation, new destination

	Total	Sustain.
Quality-oriented	51%	54%
Organised myself	71%	65%
New destination (**)	69%	78%

(*) During last outbound holiday trip.

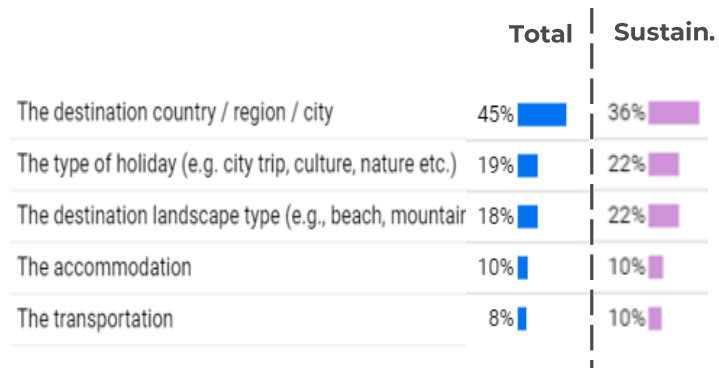
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Trip organisation and preferences (2) (*)

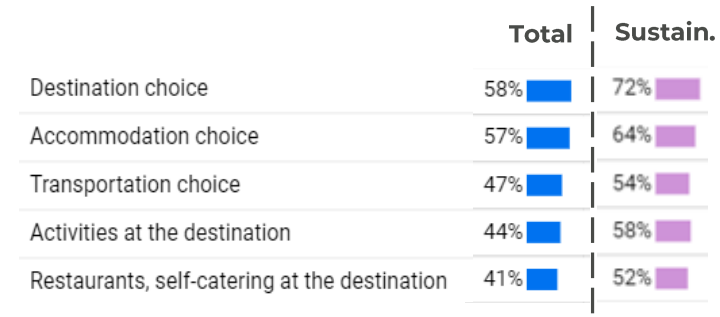
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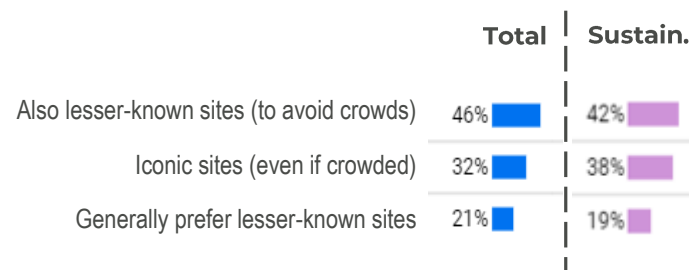
Aspects of trip first decided



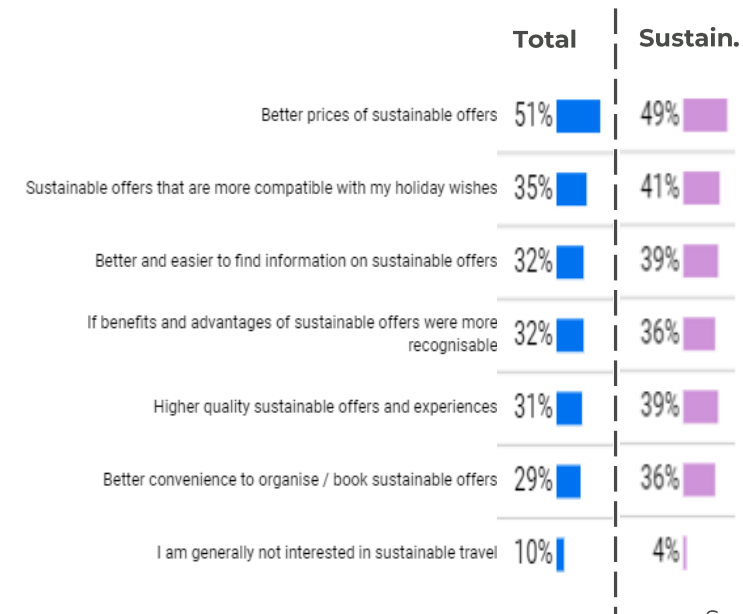
Importance of sustainability for choice of trip components



General preference for visiting iconic vs. lesser-known sites



Aspects that could convince travellers to pay more attention to sustainability at future travellings



Source: LFT Brand & Potential Studies.

(*) During last outbound holiday trip.



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