



Luxembourg for Tourism

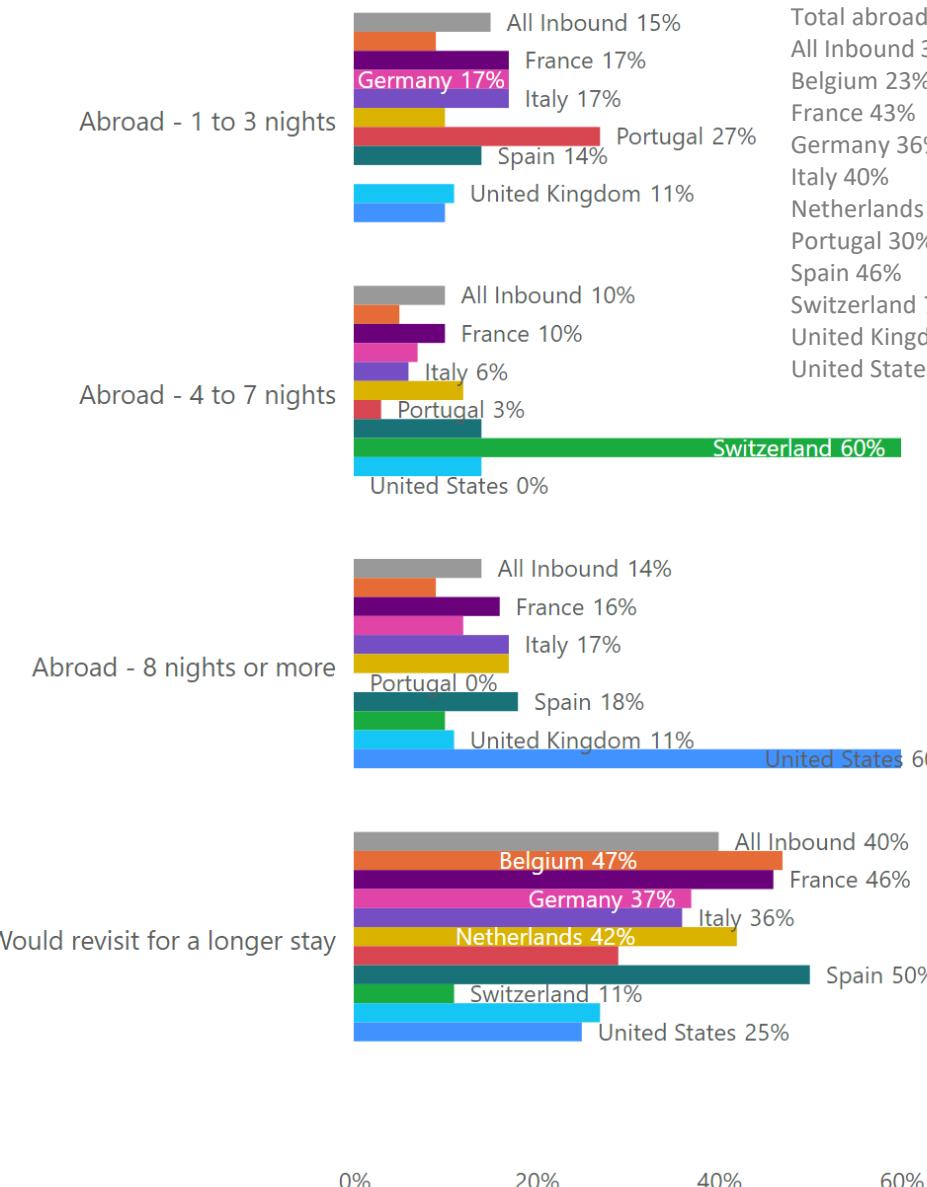
# **Theme profile**

# **FUTURE LONGER STAYS**

# **CROSS-BORDER STAYS 2024**



# **Market size of Future Longer trips and Cross-border trips segments**



Total abroad (cross-border stays):

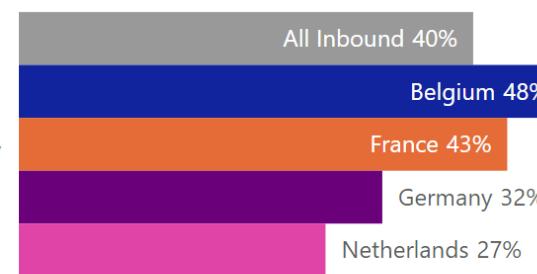
Country	Share
All Inbound	39%
Belgium	23%
France	43%
Germany	36%
Italy	40%
Netherlands	39%
Portugal	30%
Spain	46%
Switzerland	70%
United Kingdom	36%
United States	70%

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



- Americans, Swiss and Spaniards are more often combining a visit to Luxembourg with another destination. Belgians are largely visiting only Luxembourg on their trip.
- Belgians, French and Spaniards consider most revisiting for a longer stay (this also applies for same-day visitors, see next page).

Would revisit for a longer stay

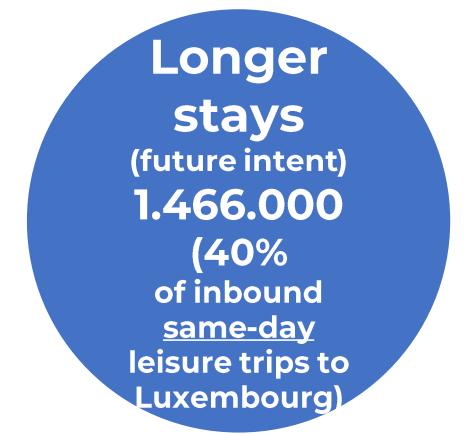


0%

20%

40%

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

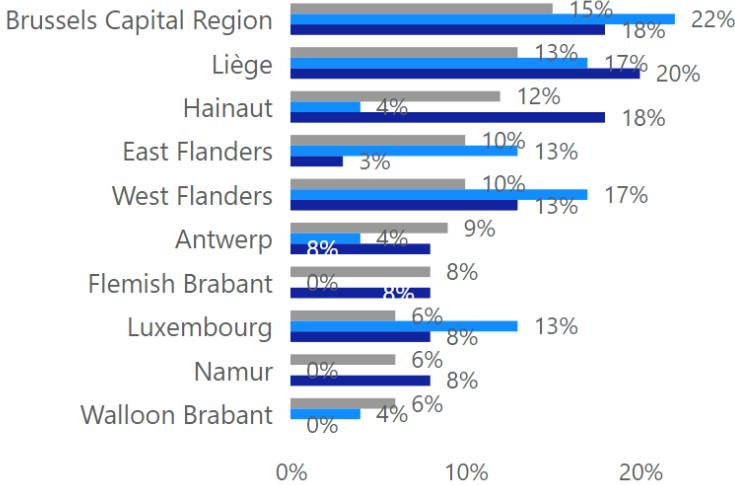


Sources: LFT/Igres Visitor Survey, 2023-2024; trip volumes are estimates based on World Travel Monitor/IPK International, LFT/Igres Visitor Survey & Editus/LFT mobile phone data.

## Region of origin (BE)

### Visitors with overnight

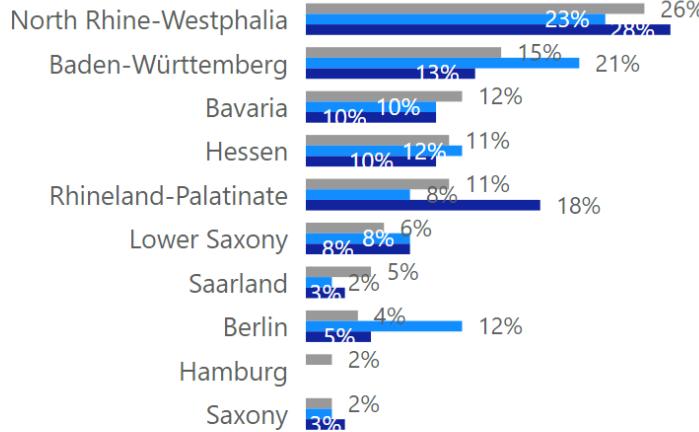
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Region of origin (DE)

### Visitors with overnight

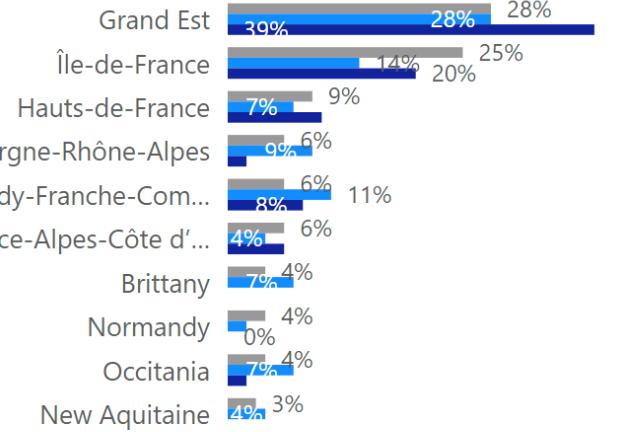
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Region of origin (FR)

### Visitors with overnight

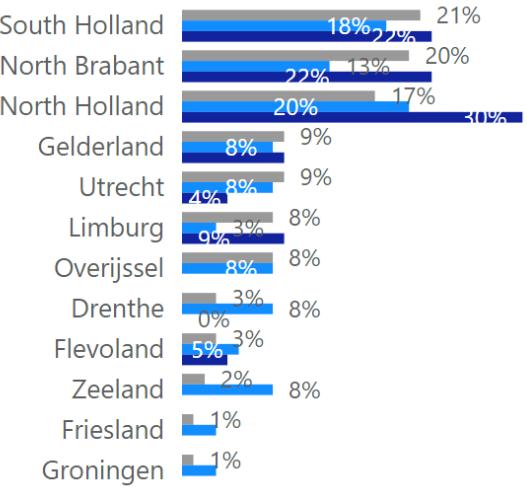
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Region of origin (NL)

### Visitors with overnight

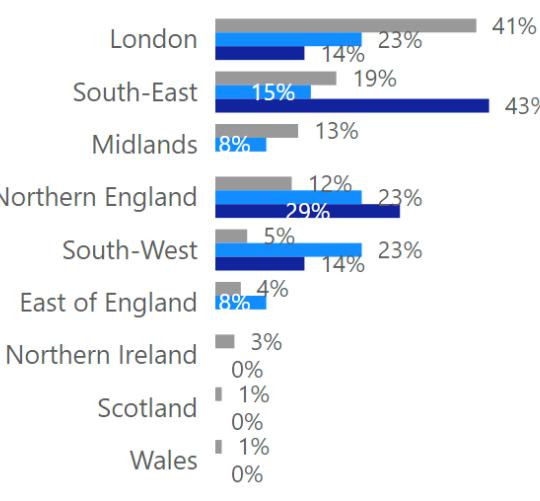
● All Inbound ● Nights abroad ● Would revisit fo...



## Region of origin (UK)

### Visitors with overnight

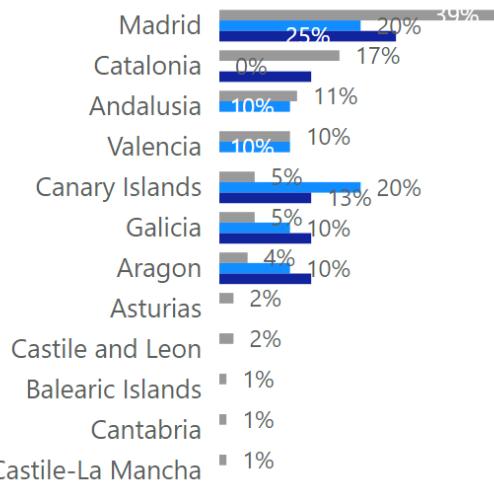
● All Inbound ● Nights abroad ● Would revisit fo...



## Region of origin (ES)

### Visitors with overnight

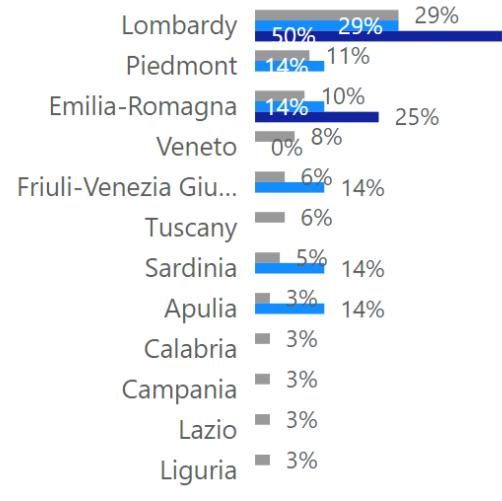
● All Inbound ● Nights abroad ● Would revisit fo...



## Region of origin (IT)

### Visitors with overnight

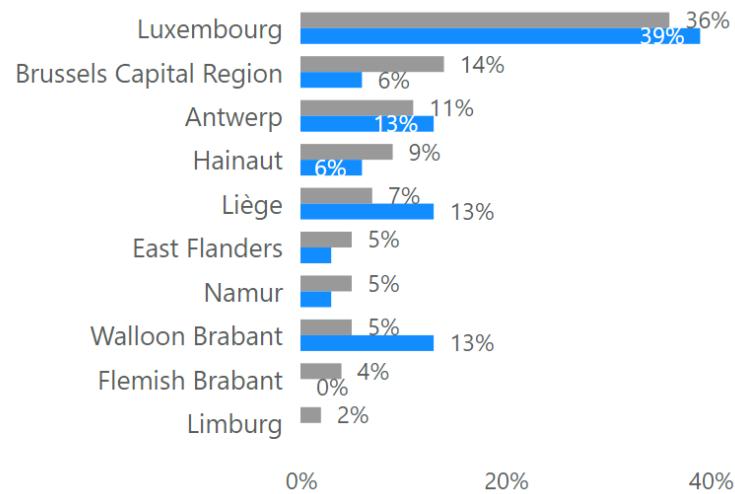
● All Inbound ● Nights abroad ● Would revisit fo...



## Region of origin (BE)

### Same-day visitors

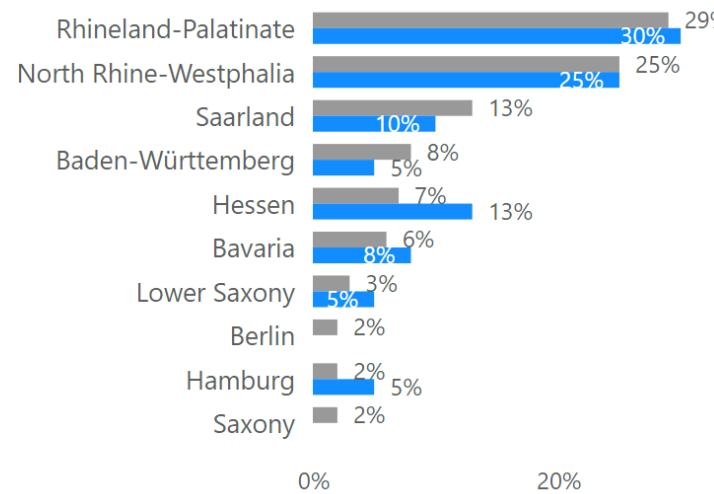
● All Inbound ● Would revisit for a longer stay



## Region of origin (DE)

### Same-day visitors

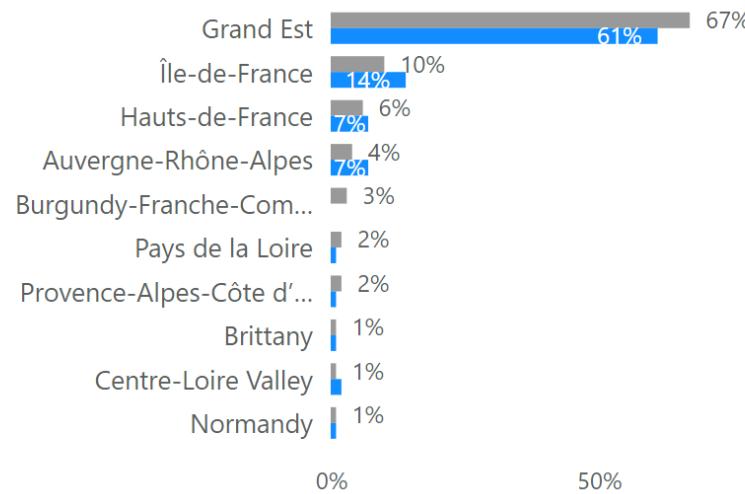
● All Inbound ● Would revisit for a longer stay



## Region of origin (FR)

### Same-day visitors

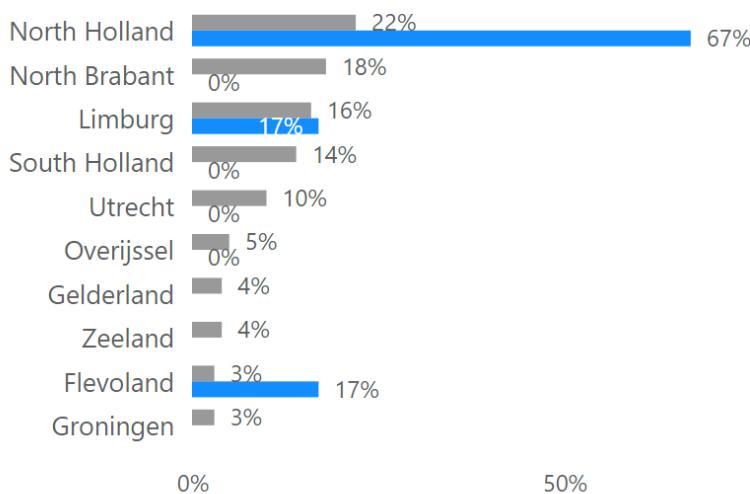
● All Inbound ● Would revisit for a longer stay



## Region of origin (NL)

### Same-day visitors

● All Inbound ● Would revisit for a longer stay



- Proximity can be a driver for more longer future stays (cf. NRW & Rheinland-Pf. In DE, Grand-Est in FR, South-East in UK). In NL, North Holland visitors, in particular, would more frequently return to Luxembourg for a longer stay.
- No clear trend by origin regions can be seen with regard to cross-border stays – but Brussels, Province du Luxembourg and Baden-Württemberg tend to yield more cross-border trips when in Luxembourg.

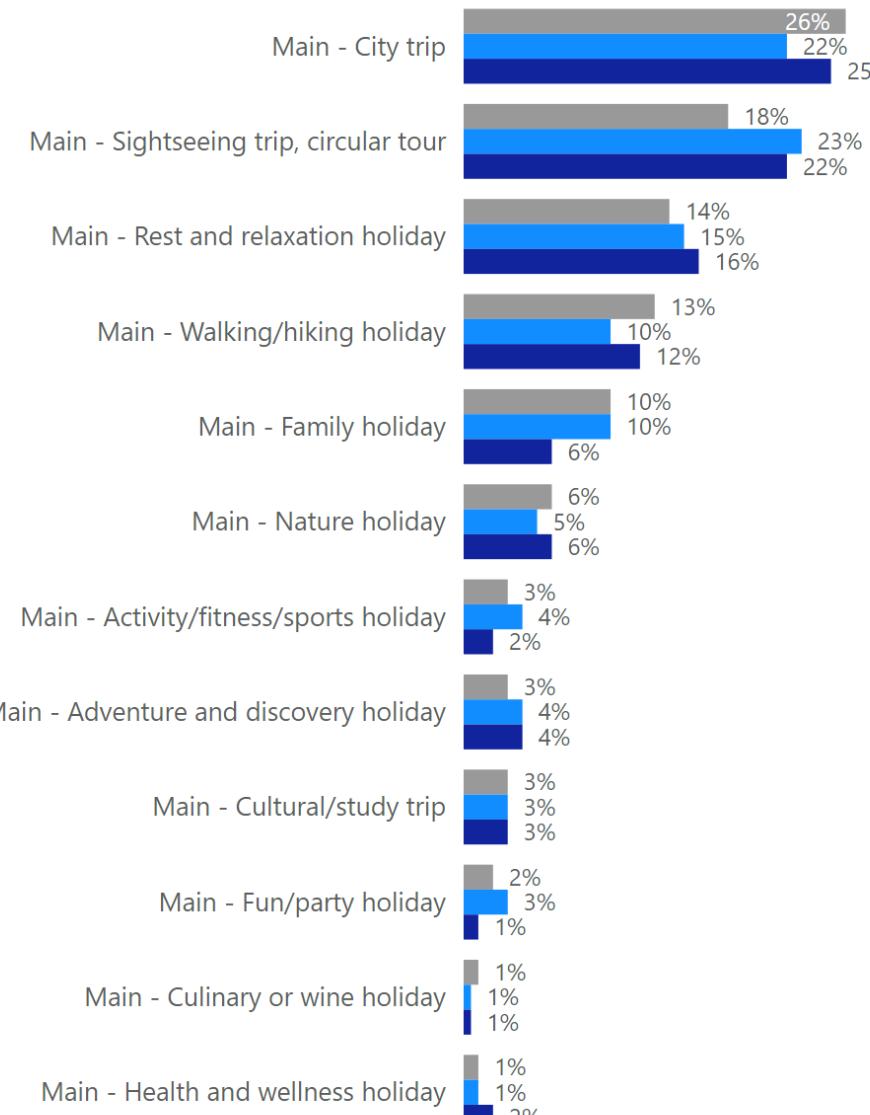


# **Travel behaviour of leisure visitors with future longer travel intent to Luxembourg and cross-border trips**

## Main holiday types

### Visitors with overnight

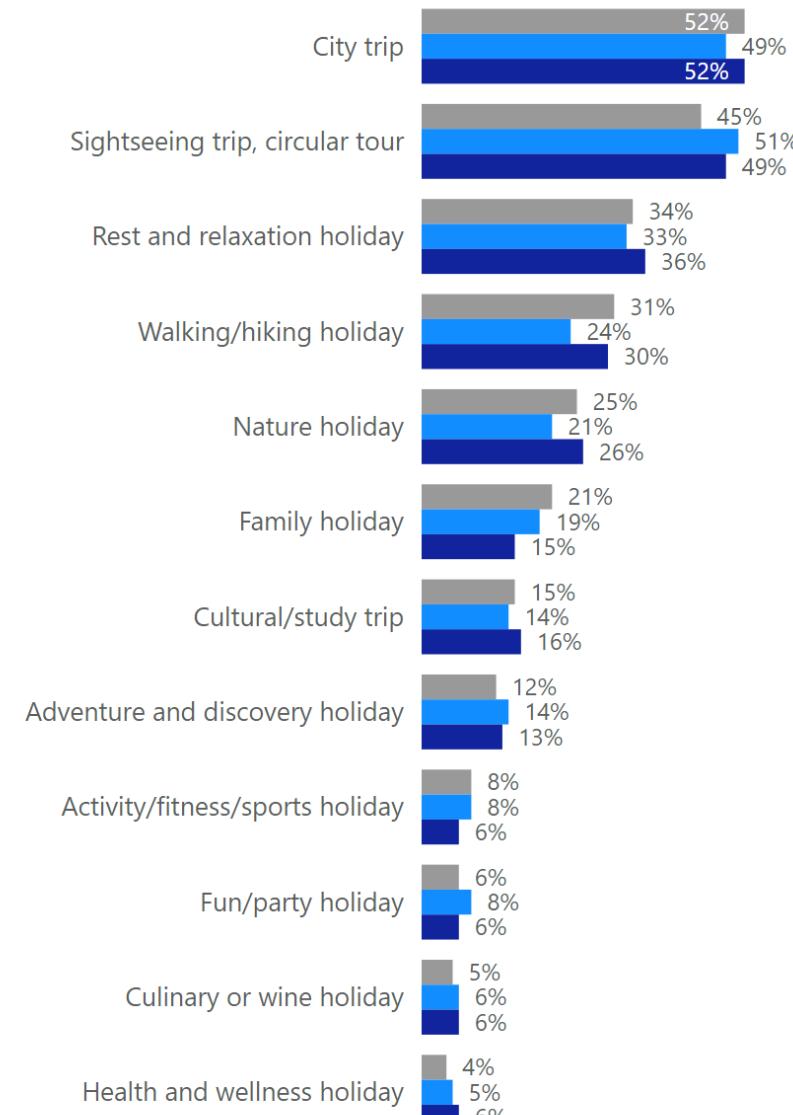
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## All holiday types

### Visitors with overnight

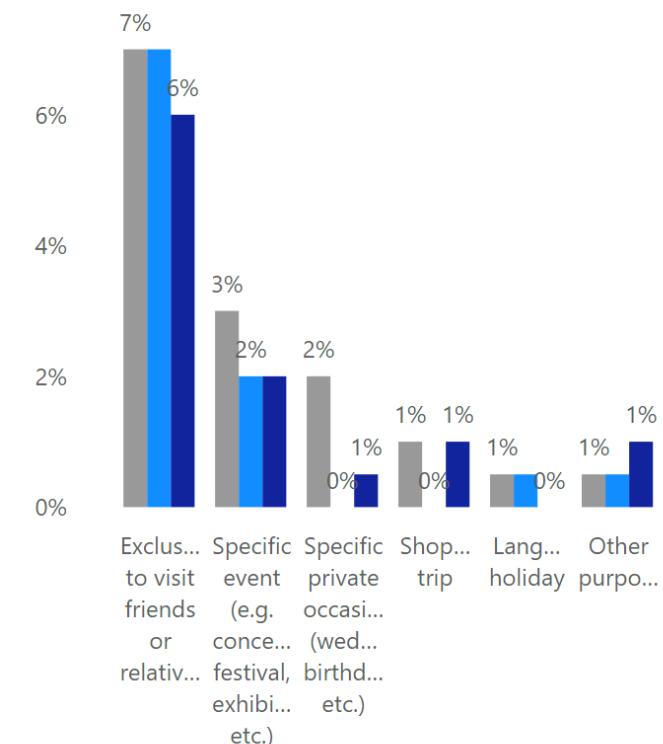
● All Inbound ● Nights abroad ● Would revisit for a longer stay



- Sightseeing is slightly overrepresented as holiday type both among cross-border visitors and those with longer future travel intent.

## Main purpose of overnight trip (if not holiday)

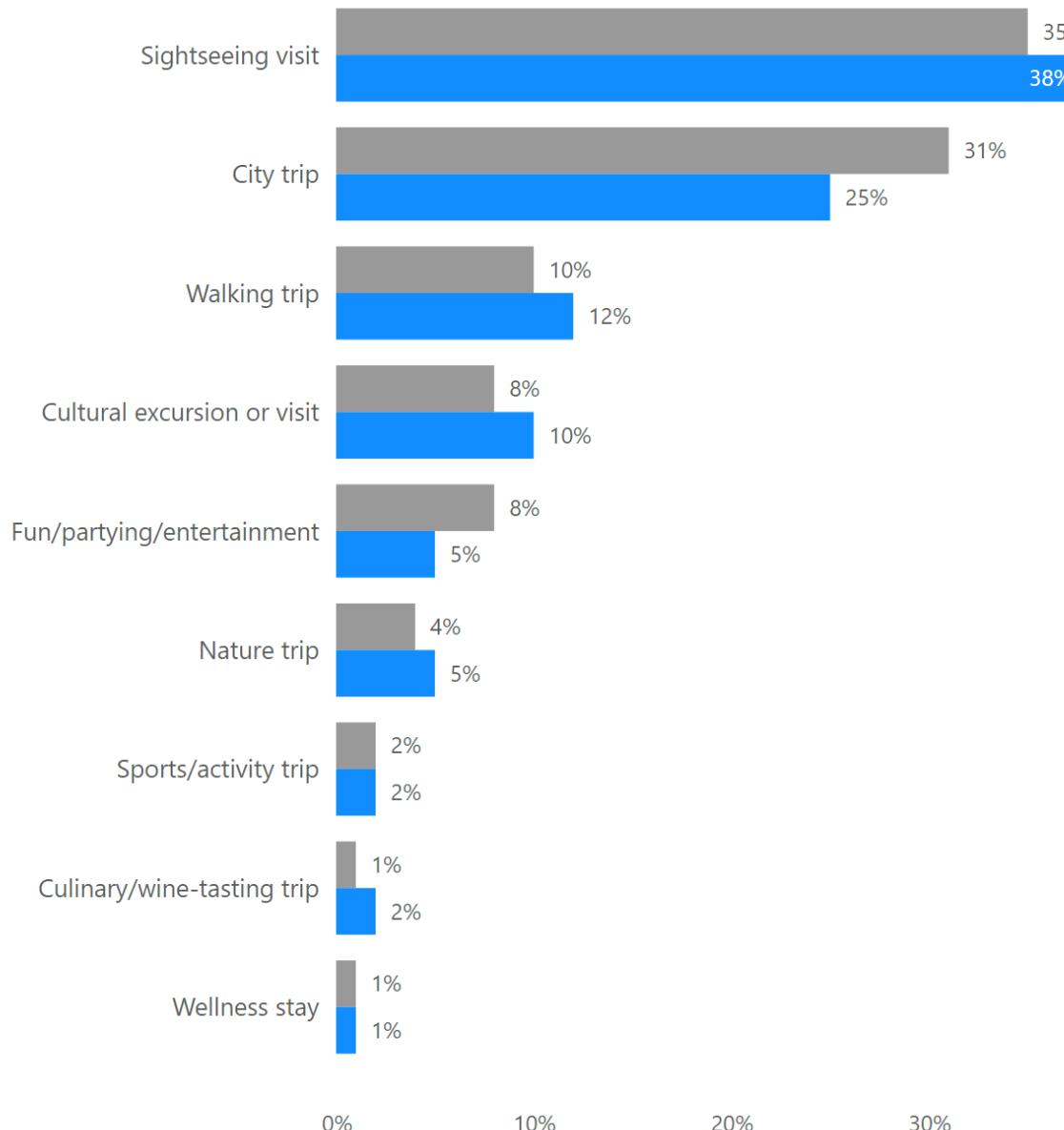
● All Inbound ● Nights abroad ● Would revisit for a longer...



# Type of excursion

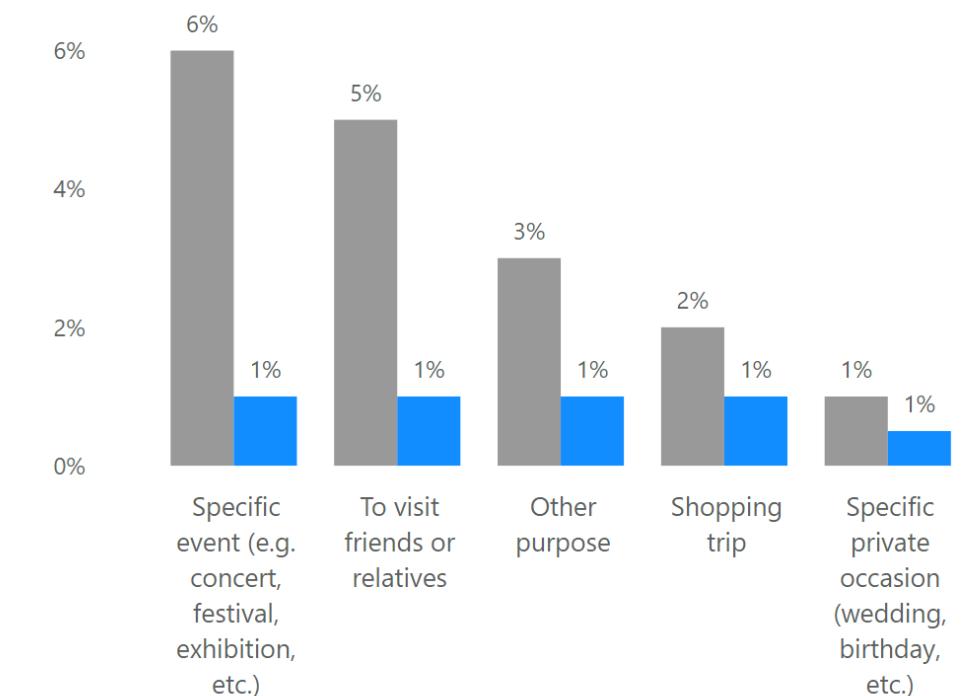
## Same-day visitors

● All Inbound ● Would revisit for a longer stay



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

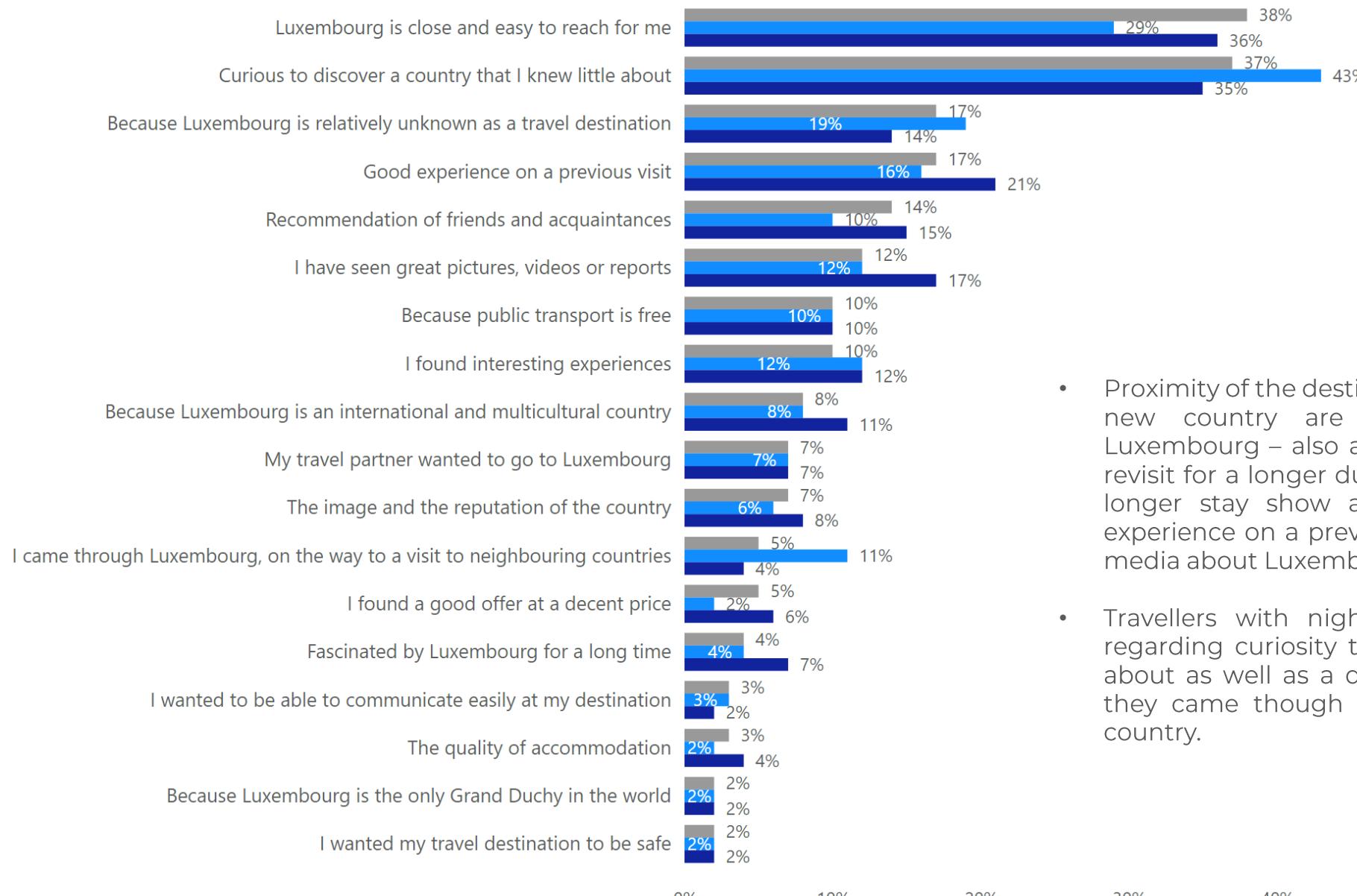
● All Inbound ● Would revisit for a longer stay



# Reasons for choosing Luxembourg

## Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

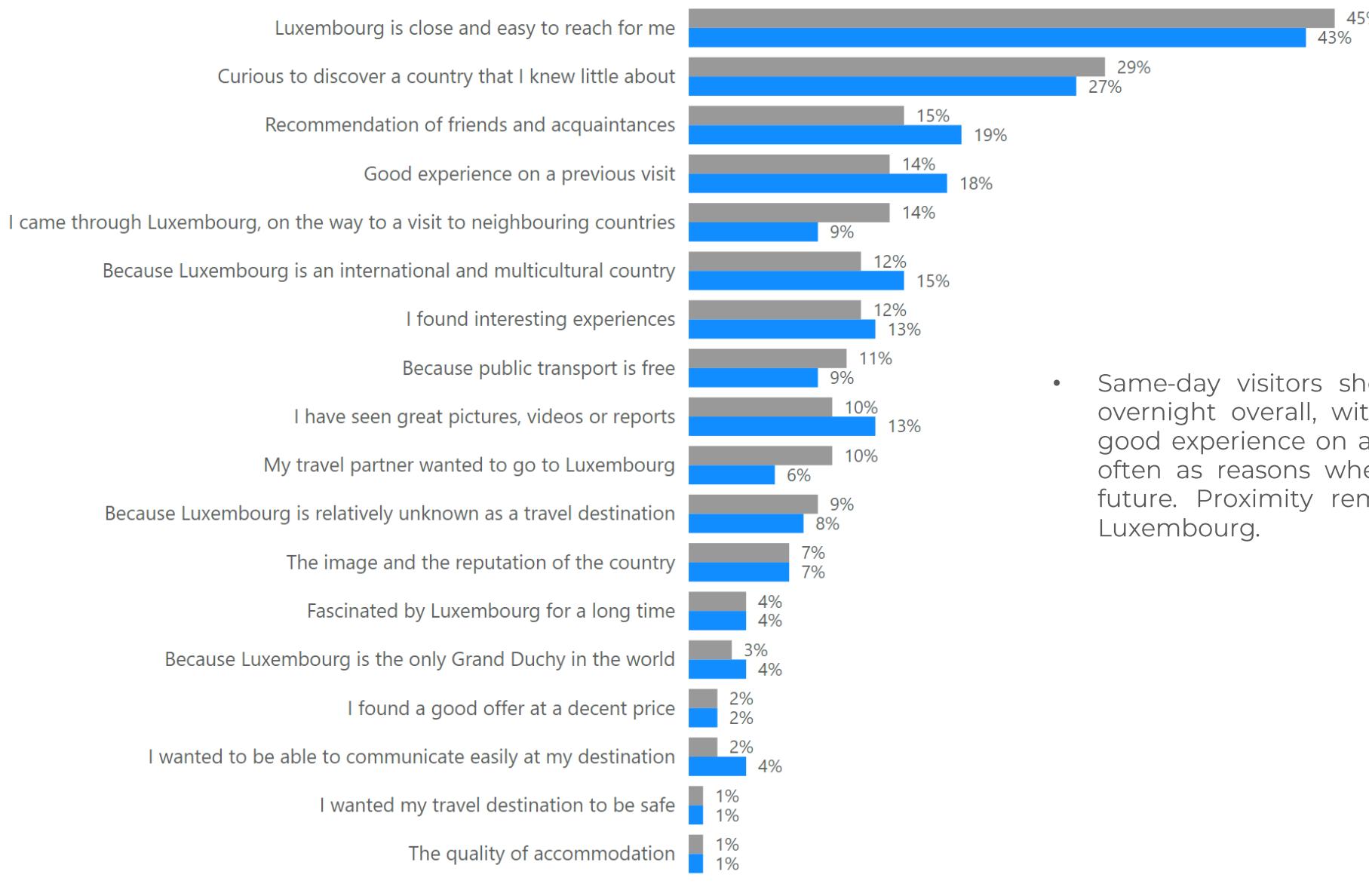


- Proximity of the destination as well as curiosity to discover a new country are the main reasons for choosing Luxembourg – also among those who would be willing to revisit for a longer duration. People who would revisit for a longer stay show a higher proportion regarding good experience on a previous visit as well as having seen great media about Luxembourg.
- Travellers with nights abroad show the highest share regarding curiosity to discover a country they know little about as well as a disproportionately high share indicating they came through Luxembourg to visit a neighbouring country.

# Reasons for choosing Luxembourg

## Same-day visitors

● All Inbound ● Would revisit for a longer stay

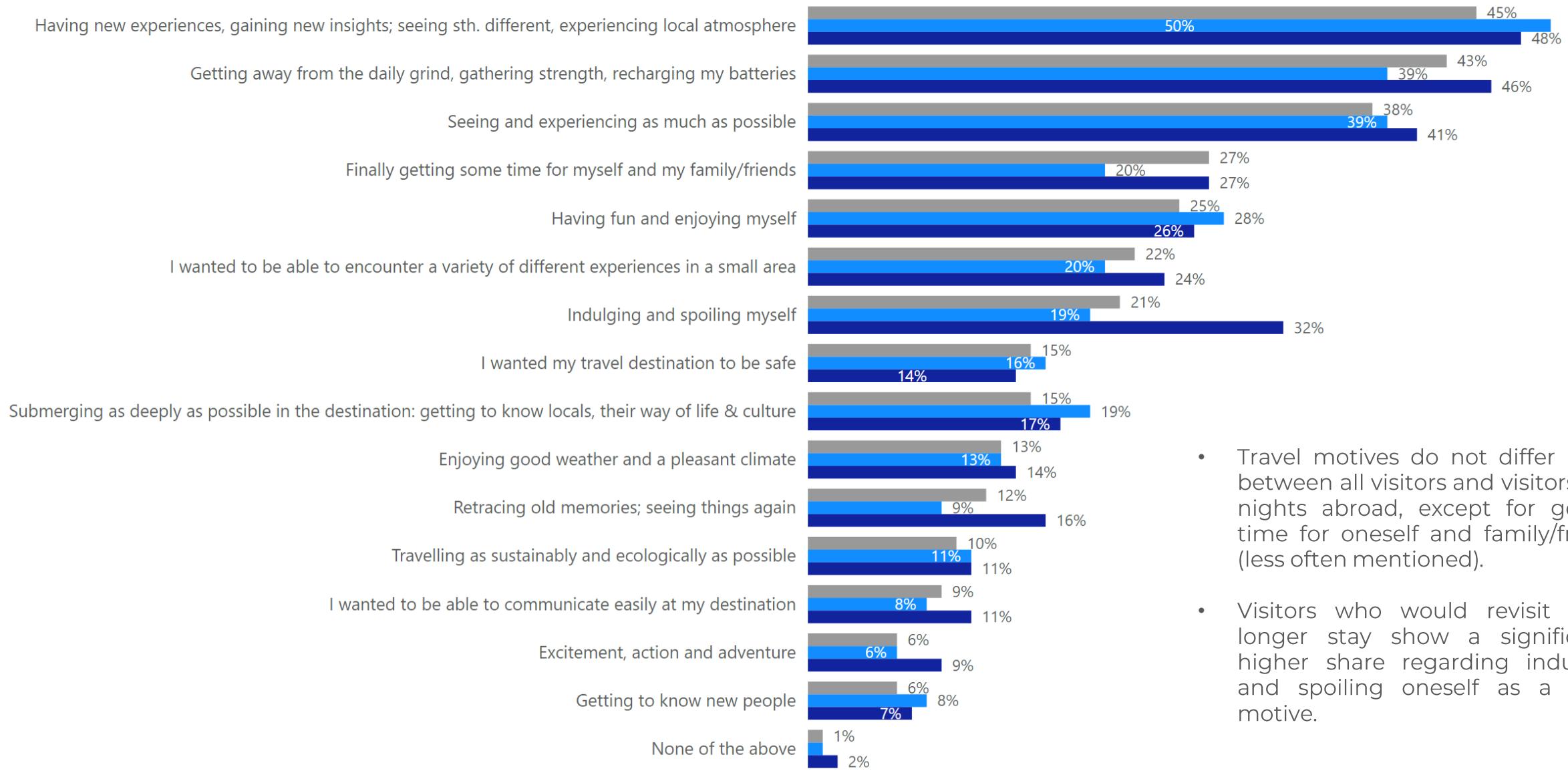


- Same-day visitors show similar reasons to visitors with overnight overall, with recommendations of friends and good experience on a previous visit being indicated more often as reasons when considering a longer visit in the future. Proximity remains the main reason for visiting Luxembourg.

# Travel motives

## Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

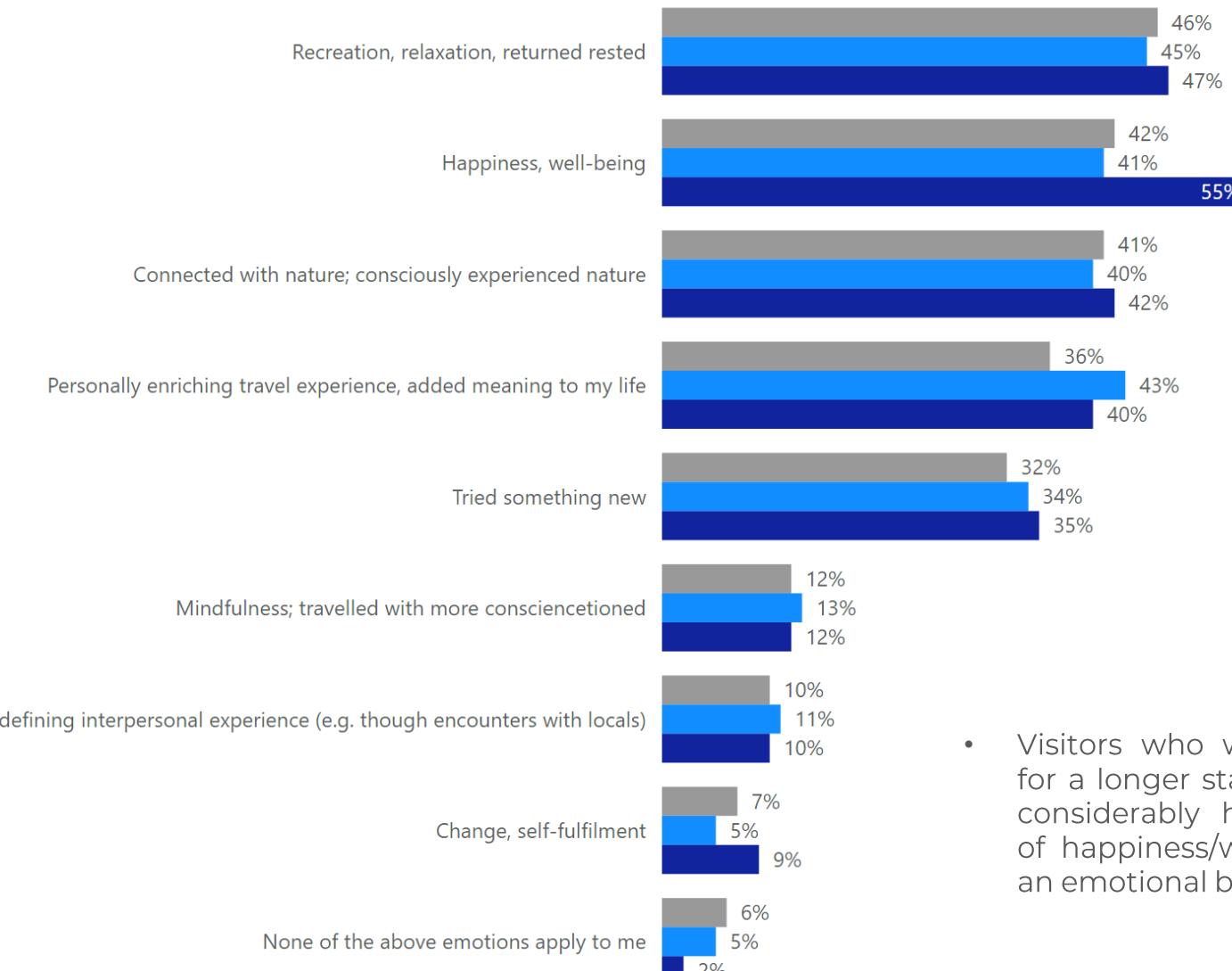


- Travel motives do not differ much between all visitors and visitors with nights abroad, except for getting time for oneself and family/friends (less often mentioned).
- Visitors who would revisit for a longer stay show a significantly higher share regarding indulging and spoiling oneself as a travel motive.

## Emotional benefits experienced during stay

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

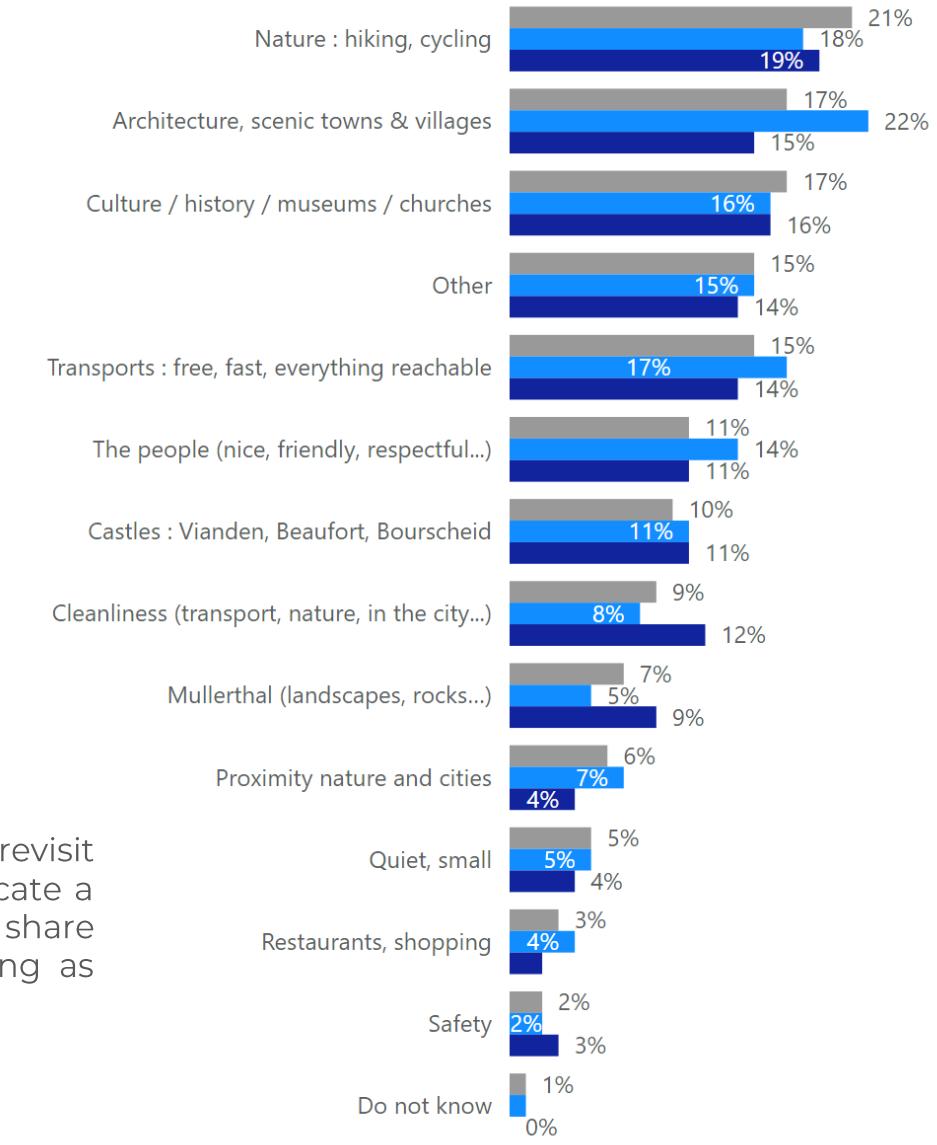


- Visitors who would revisit for a longer stay indicate a considerably higher share of happiness/well-being as an emotional benefit

## Particularly positive experience during stay (open question)

### Visitors with overnight

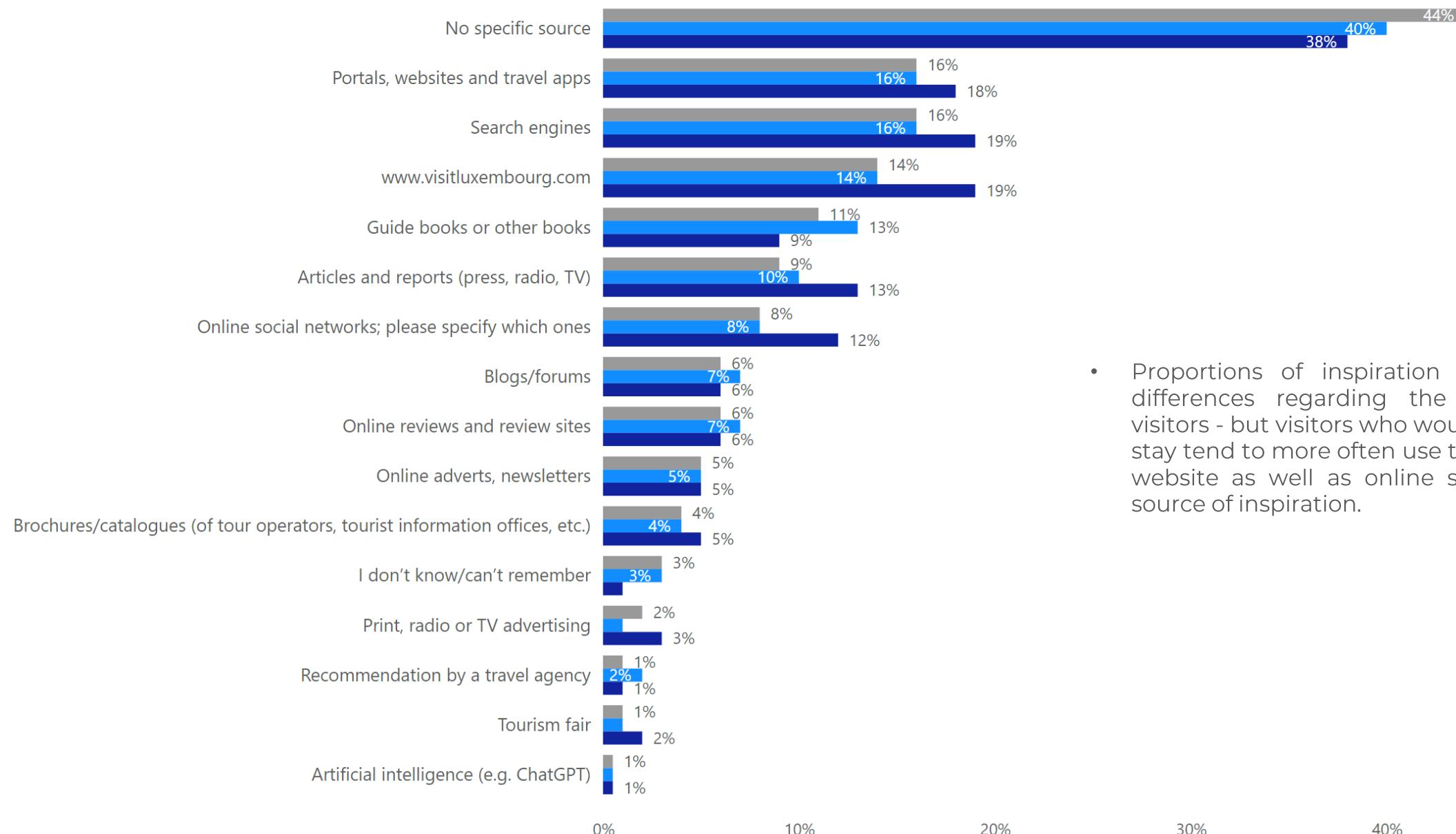
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Inspiration sources

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

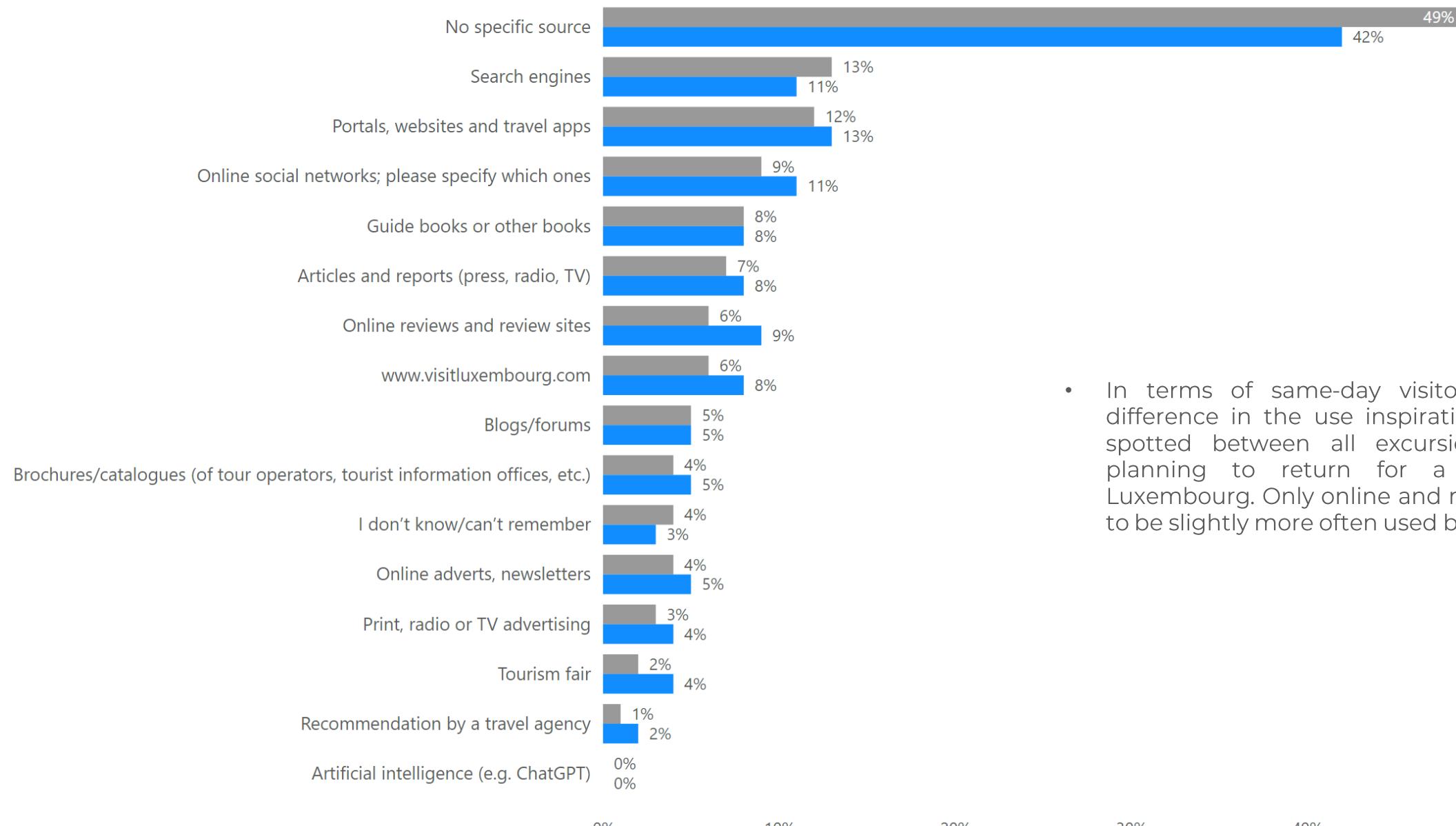


- Proportions of inspiration sources show little differences regarding the different types of visitors - but visitors who would revisit for a longer stay tend to more often use the Visit Luxembourg website as well as online social networks as a source of inspiration.

## Inspiration sources

### Same-day visitors

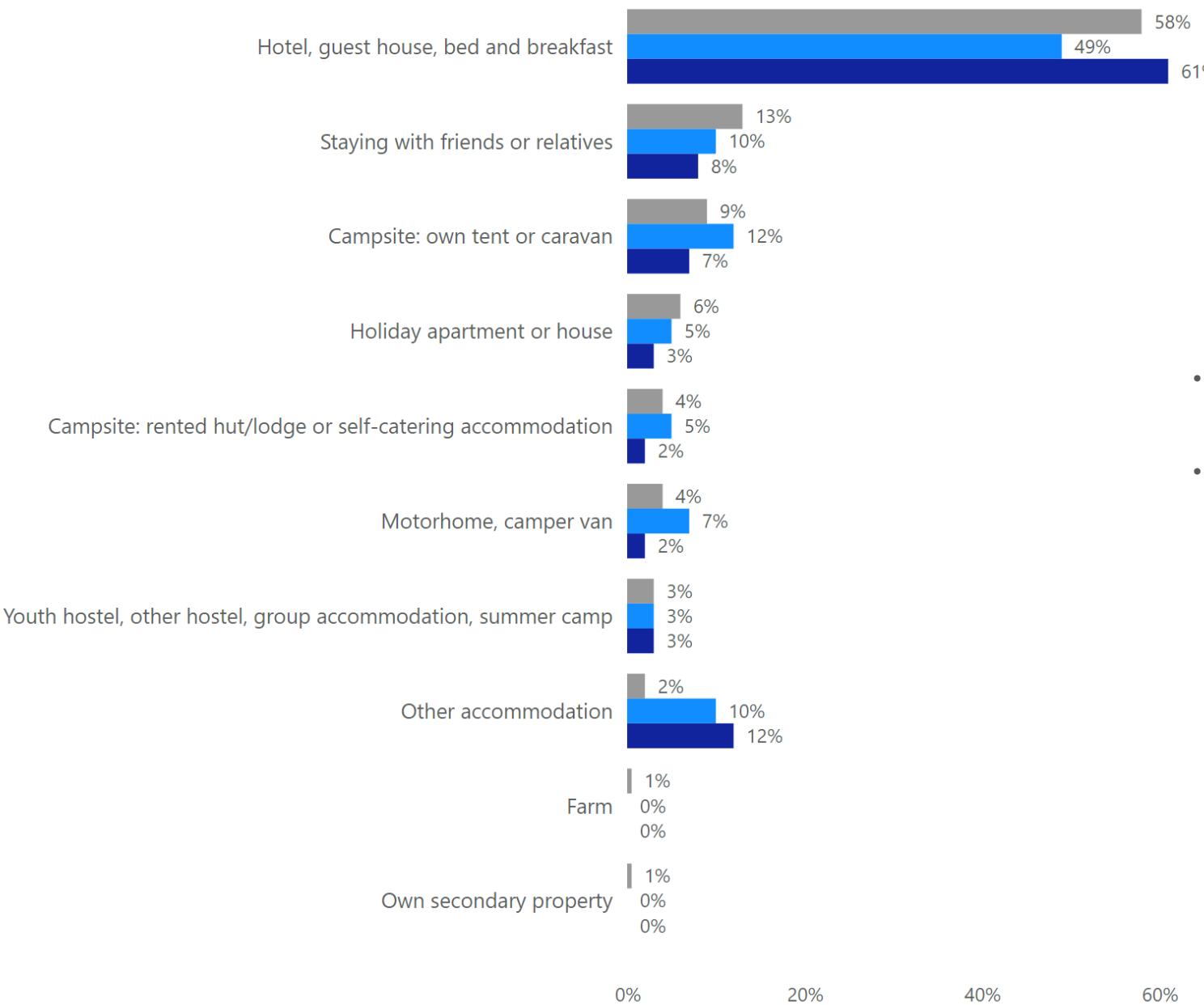
● All Inbound ● Would revisit for a longer stay



- In terms of same-day visitors, no significant difference in the use of inspiration source can be spotted between all excursionists and those planning to return for a longer stay to Luxembourg. Only online and review sites appear to be slightly more often used by the latter.

## Type of accommodation

● All Inbound ● Nights abroad ● Would revisit for a longer stay

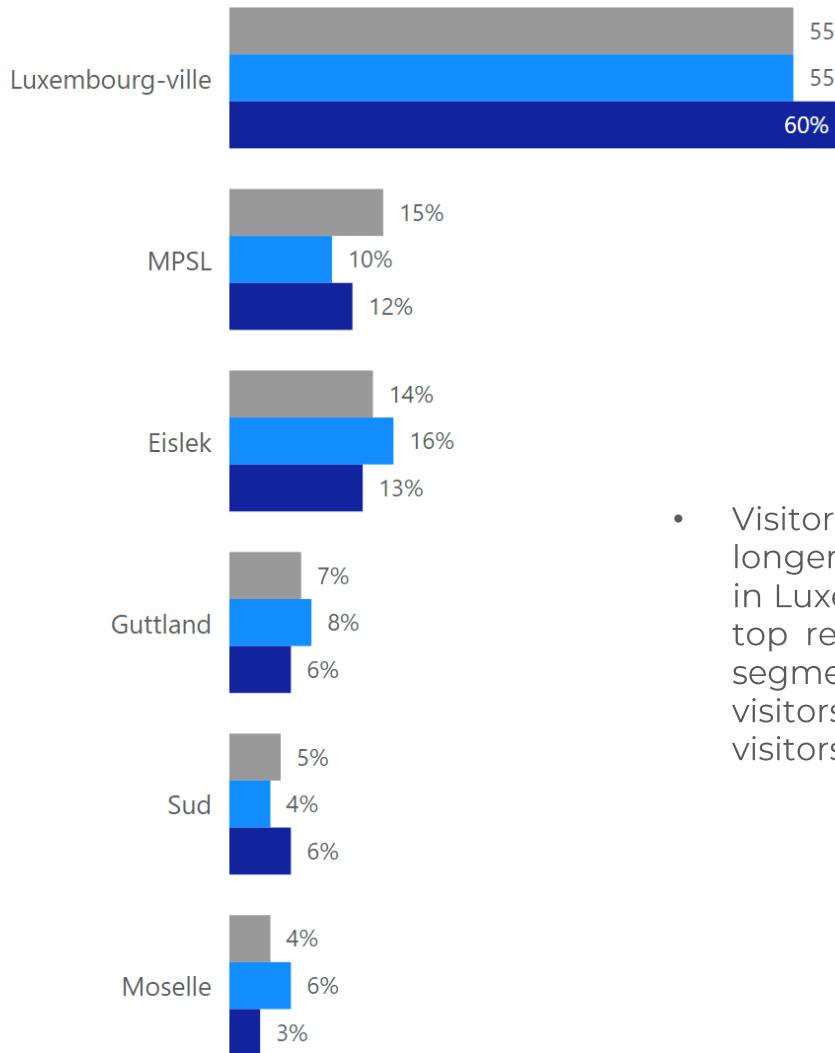


- Cross-border stays are more often than average made by camping & motorhome travellers.
- Visitors considering returning for a longer visit slightly more often stayed in hotels which is also the top accommodation type across both sub-segments.

## Destination region

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay



- Visitors considering returning for a longer visit slightly more often stayed in Luxembourg City, which is also the top region of stay across both sub-segments. The share of cross-border visitors is considerably lower among visitors staying in MPSL region.

## Shares by destination region

### Visitors with overnight

#### Total abroad (cross-border stays):

All Inbound 39%

Eislek 45%

Gutland 46%

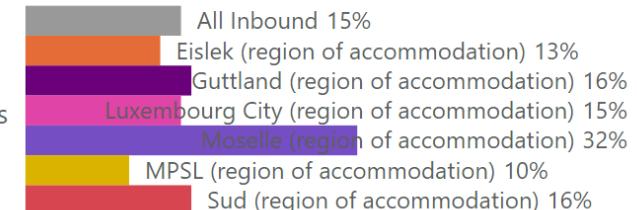
Luxembourg City 38%

Moselle 57%

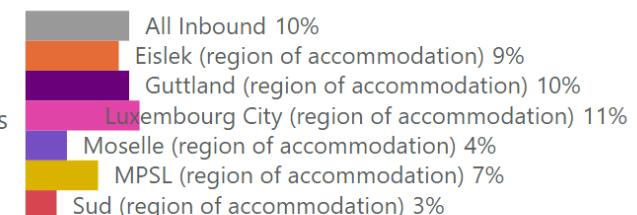
MPSL 28%

Sud 38%

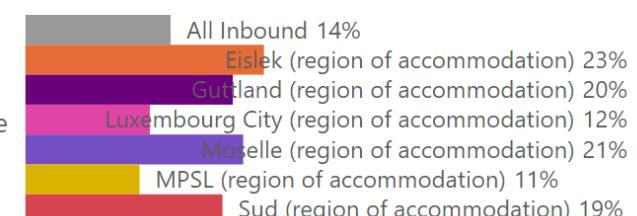
#### Abroad - 1 to 3 nights



#### Abroad - 4 to 7 nights



#### Abroad - 8 nights or more



#### Would revisit for a longer stay



0% 20% 40% 60%

0% 20% 40%

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

## Shares by target segments

### Visitors with overnight

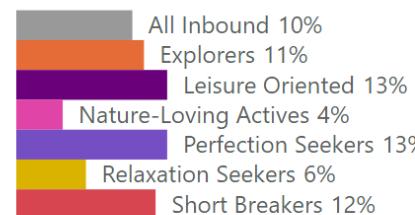


Abroad - 1 to 3 nights

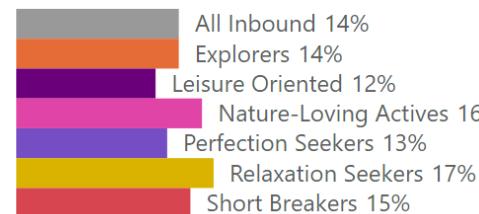
Total abroad (cross-border stays):

All Inbound	39%
Explorers	42%
Leisure Oriented	35%
Nature-Loving Actives	32%
Perfection Seekers	33%
Relaxation Seekers	39%
Short Breakers	40%

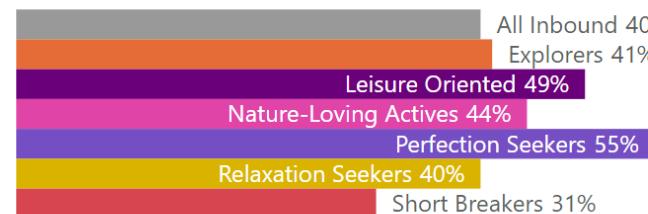
Abroad - 4 to 7 nights



Abroad - 8 nights or more

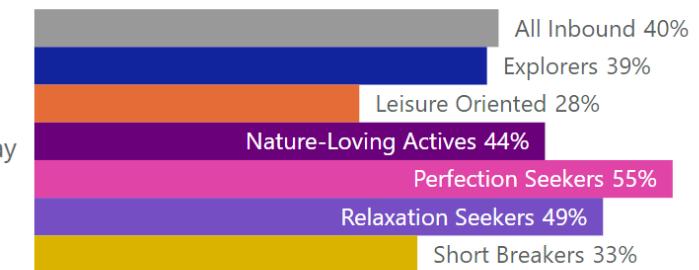


Would revisit for a longer stay



## Shares by target segments

### Same-day visitors



Would revisit for a longer stay

- Nature-Loving Actives and Perfection Seekers are more frequently visiting only Luxembourg on their trip than the other target segments.
- Perfection Seekers show the highest, and Short breakers (as well as Leisure Oriented, in the case of same-day visitors) show the lowest intent to revisit for a longer stay.

0% 20% 40% 60%

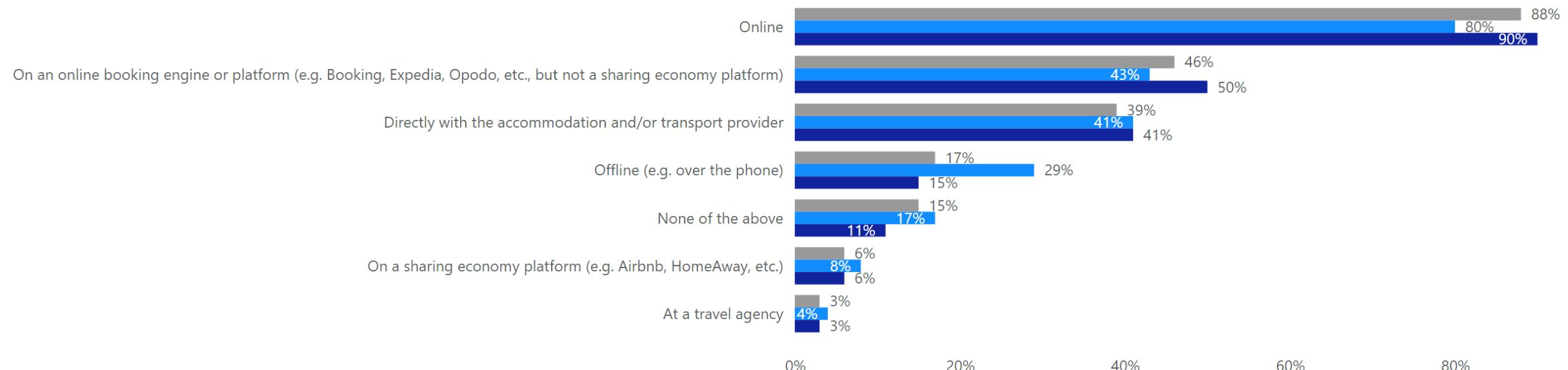
0% 20% 40% 60%

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

## Booking channels

### Visitors with overnight

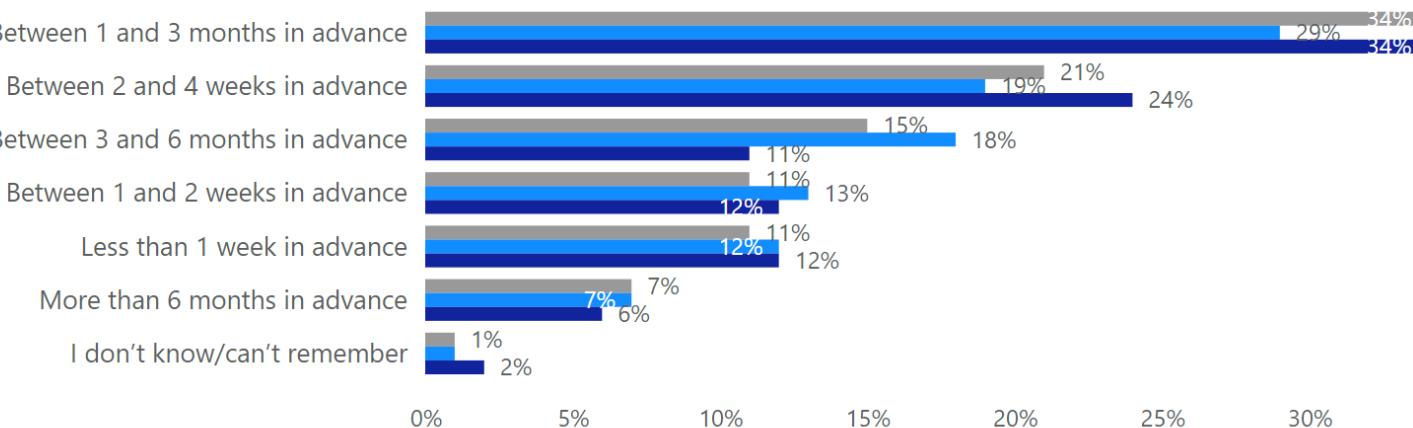
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Decision moment

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

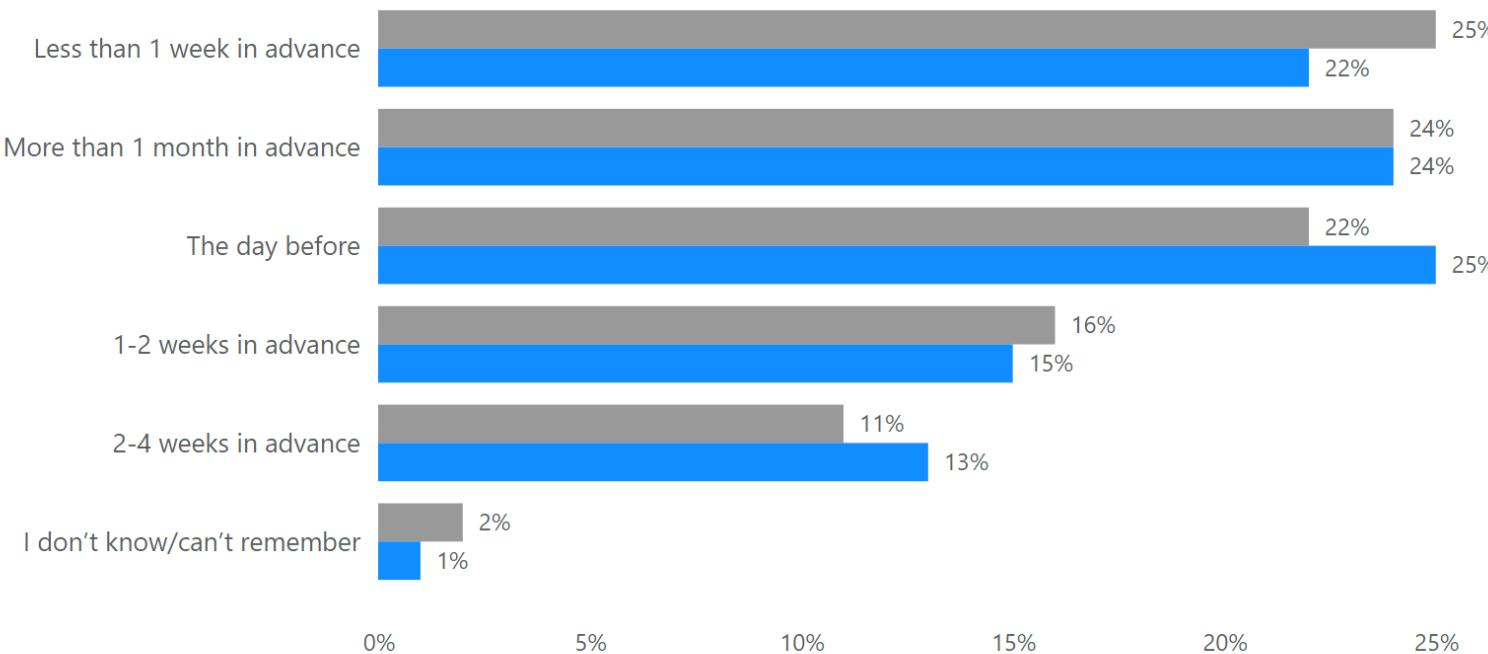


- For visitors with nights abroad, offline bookings are comparatively more frequent than for all travellers.
- Around 50% of decisions are made between 2 weeks and 3 months in advance with little differences between visitor segments.

## Decision moment

### Same-day visitors

● All Inbound ● Would revisit for a longer stay

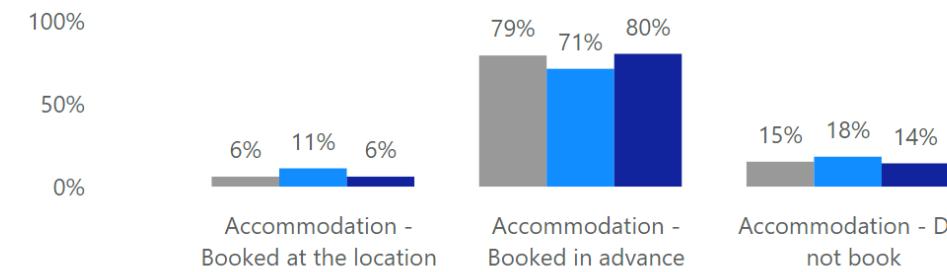


- Same-day visitors generally show a shorter timespan from the decision moment to the visit than visitors with overnights. This is also valid for same-day visitors that would intend to revisit Luxembourg for a longer stay.

## Booking of travel items

### Accommodation

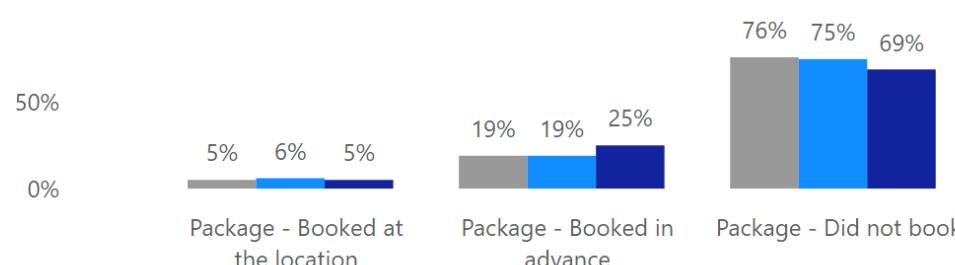
Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Booking of travel items

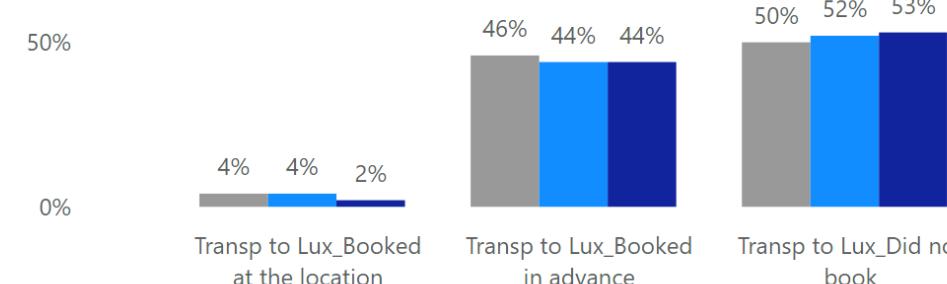
### Package

Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay



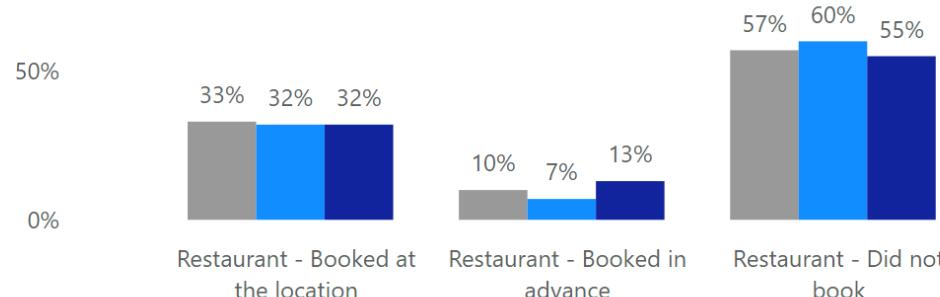
### Transport to Luxembourg

Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay



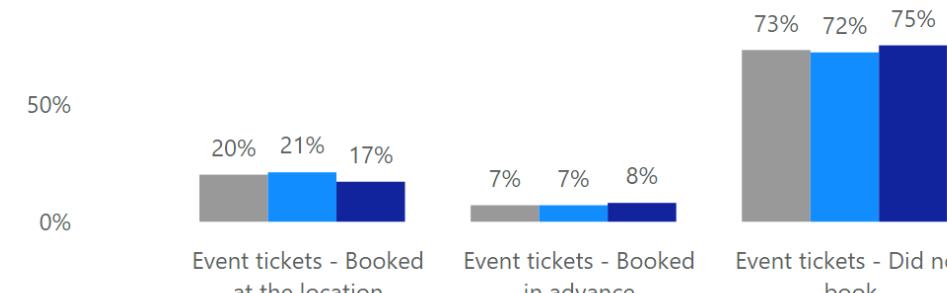
### Restaurant

Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay



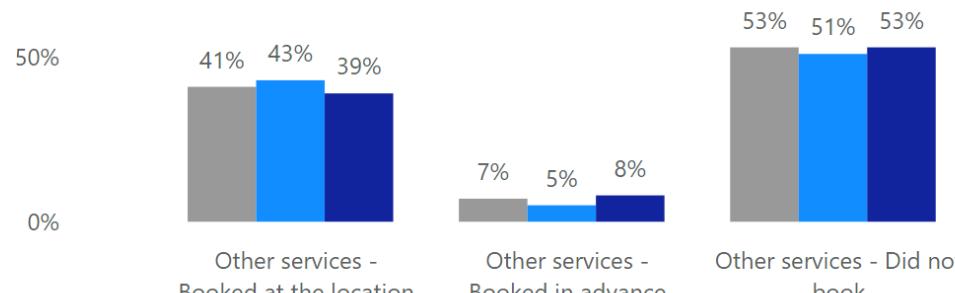
### Event tickets

Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay



### Other services

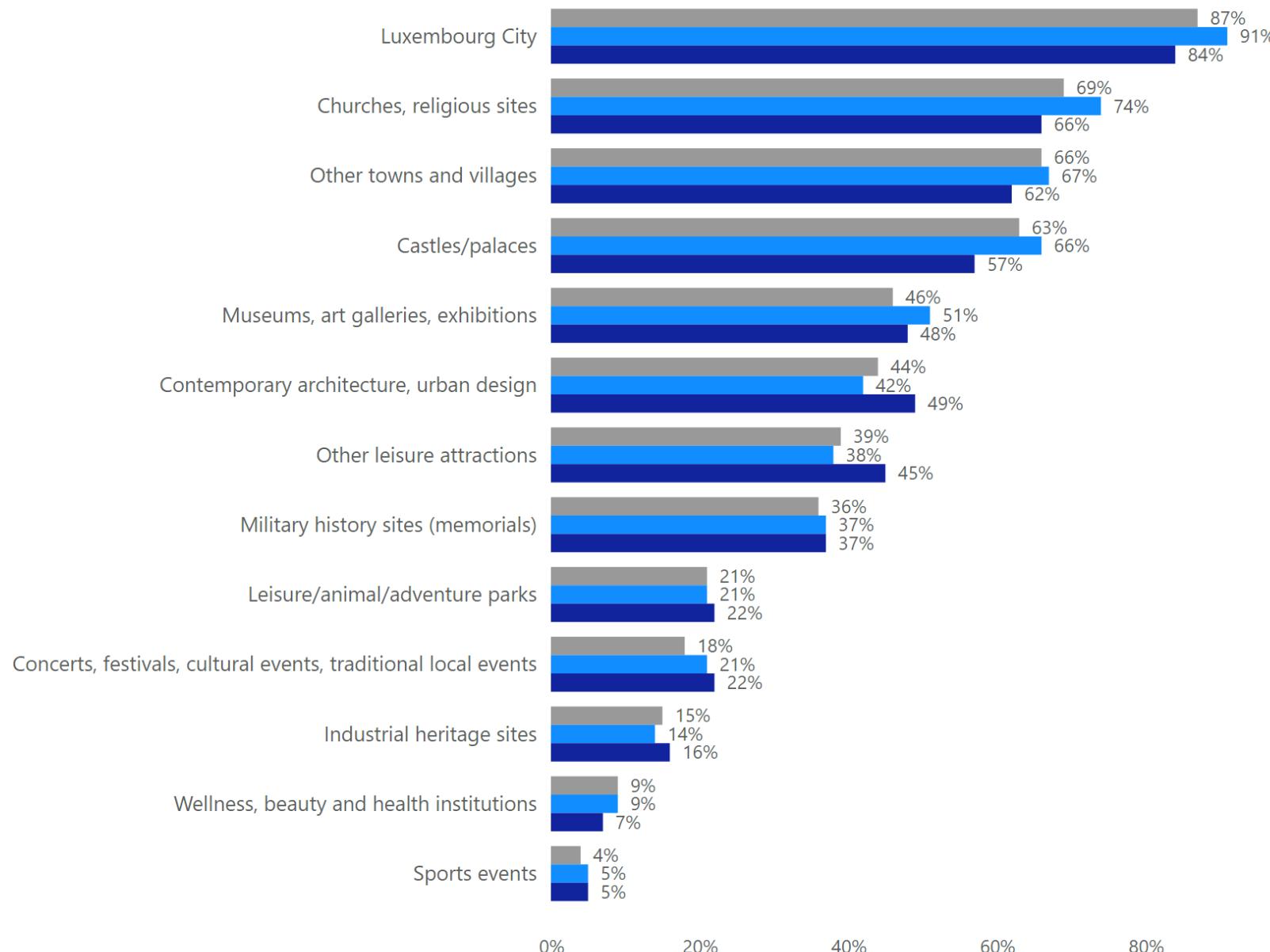
Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Places visited

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

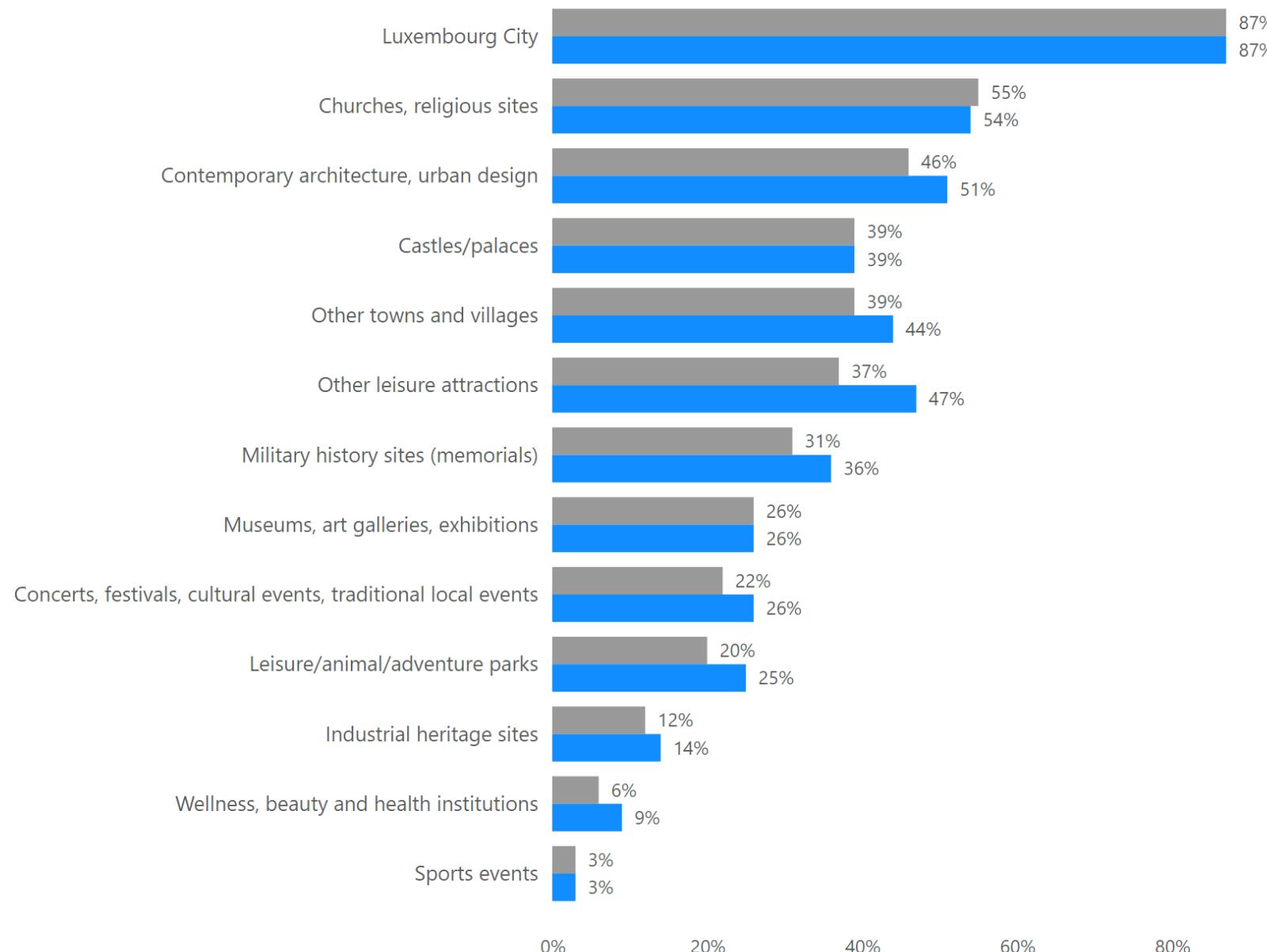


- Luxembourg City represents the most visited place followed by churches, other towns and castles. This ranking also remains identical among both visitors intending to return for a longer visit and cross-border visitors. The latter tend to visit the aforementioned places in even higher numbers than the average.
- Visitors with the intention to return for a longer visit have slightly more often visited contemporary architecture sites and other leisure attractions, and slightly less often visited castles.

## Places visited

### Same-day visitors

● All Inbound ● Would revisit for a longer stay



- With regard to same-day visitors, too, visitors willing to revisit for a longer trip have disproportionately often visited contemporary architecture and other leisure attractions, but also, e.g., military history sites and leisure/animal parks.

## Non-sporting activities

### Visitors with overnight

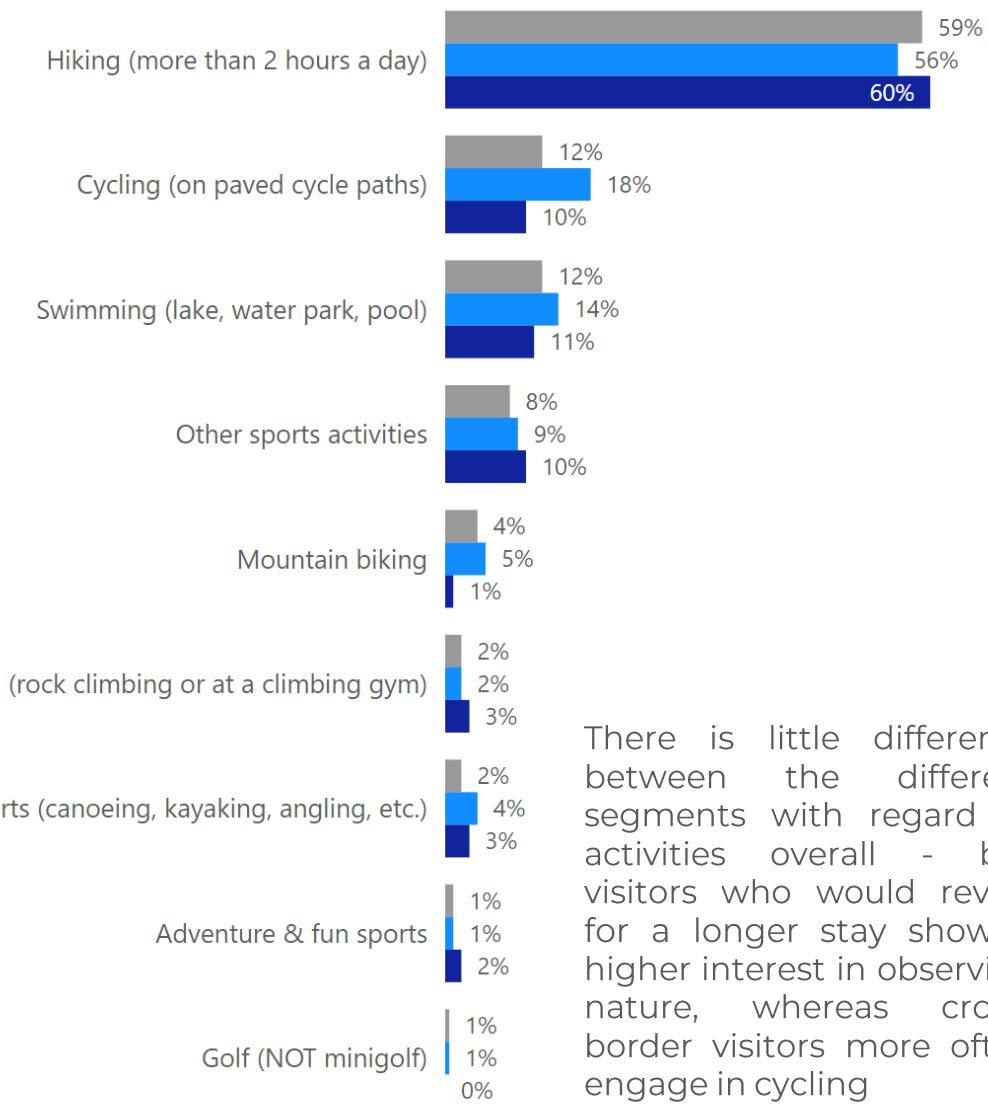
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Sporting activities

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay



There is little difference between the different segments with regard to activities overall - but visitors who would revisit for a longer stay show a higher interest in observing nature, whereas cross-border visitors more often engage in cycling

0% 20% 40% 60% 80%

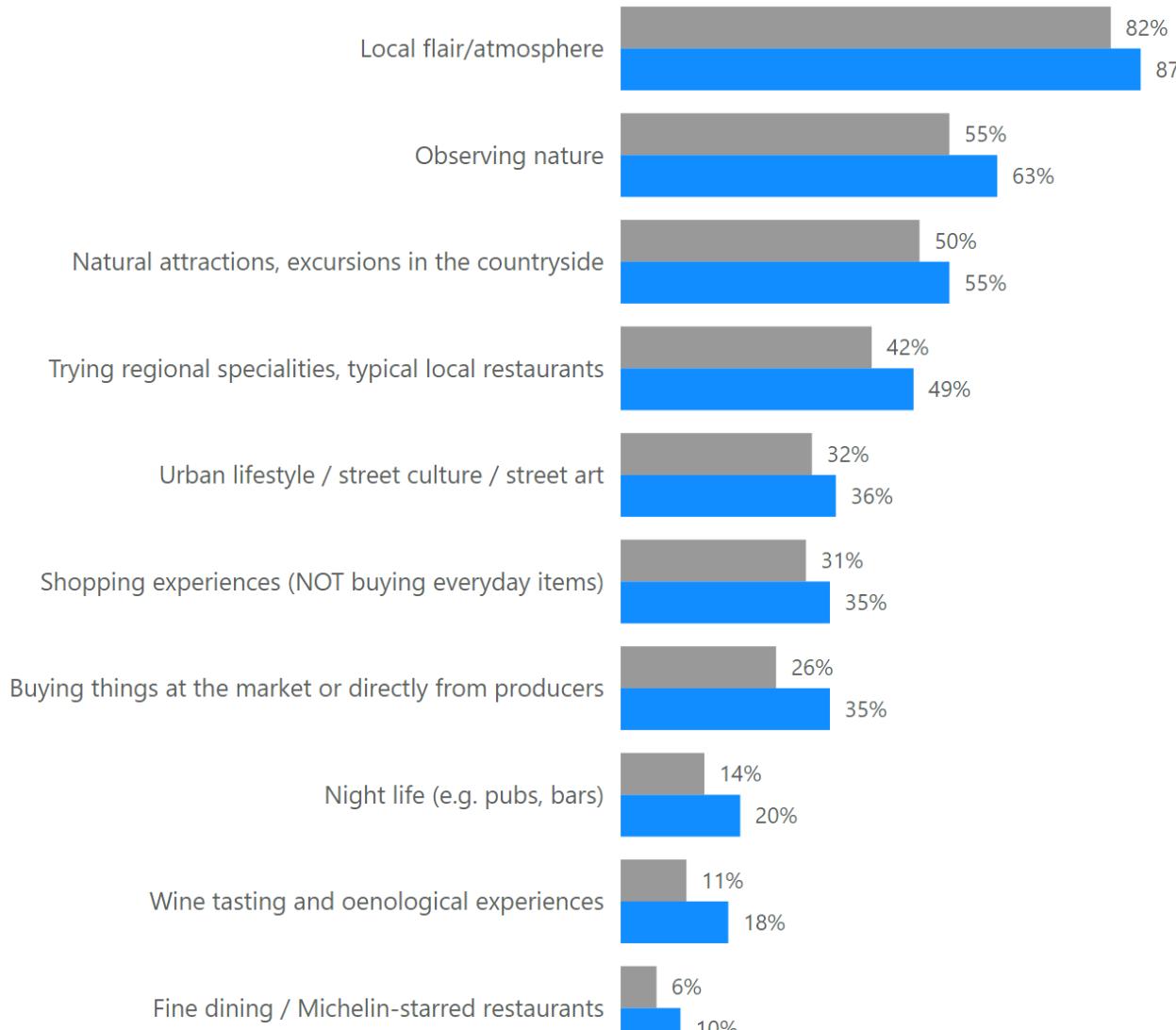
0% 50%

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

## Non-sporting activities

### Same-day visitors

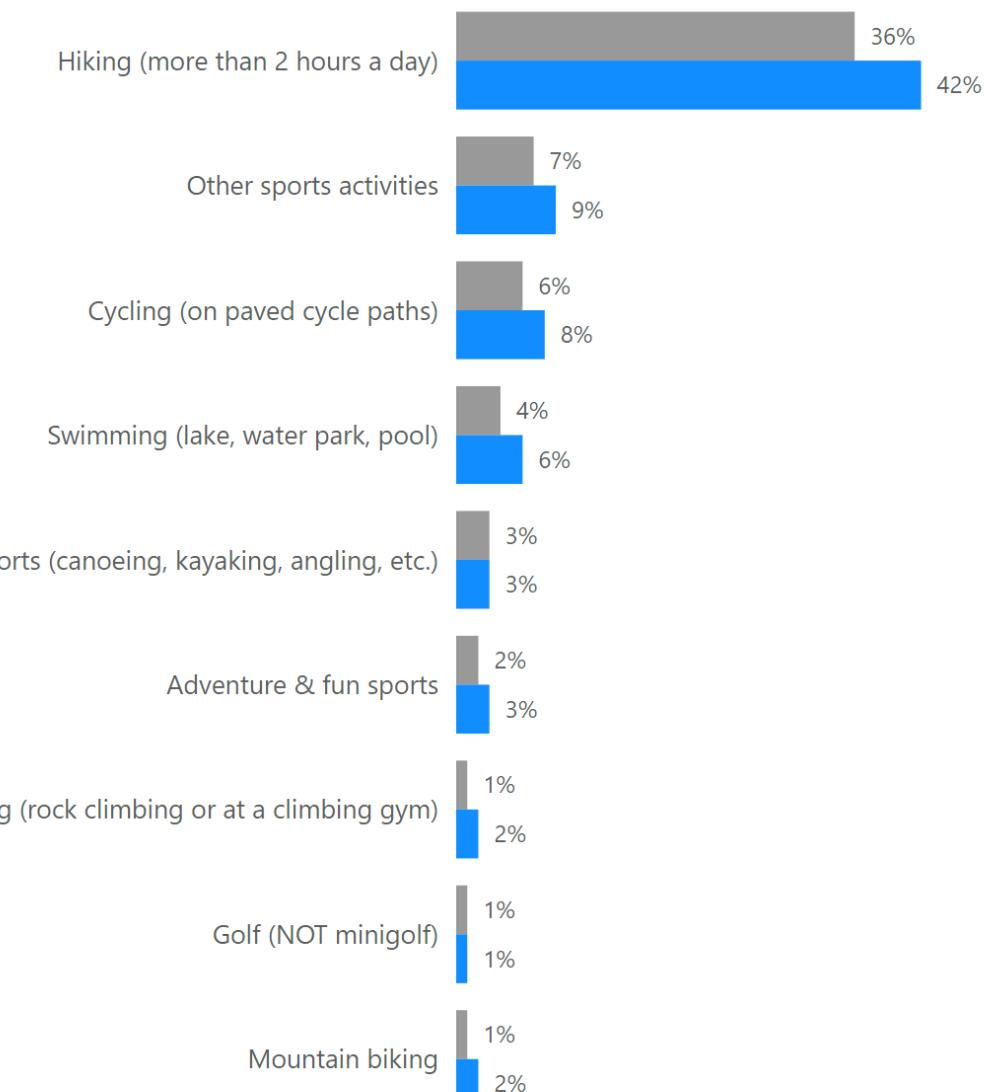
● All Inbound ● Would revisit for a longer stay



## Sporting activities

### Same-day visitors

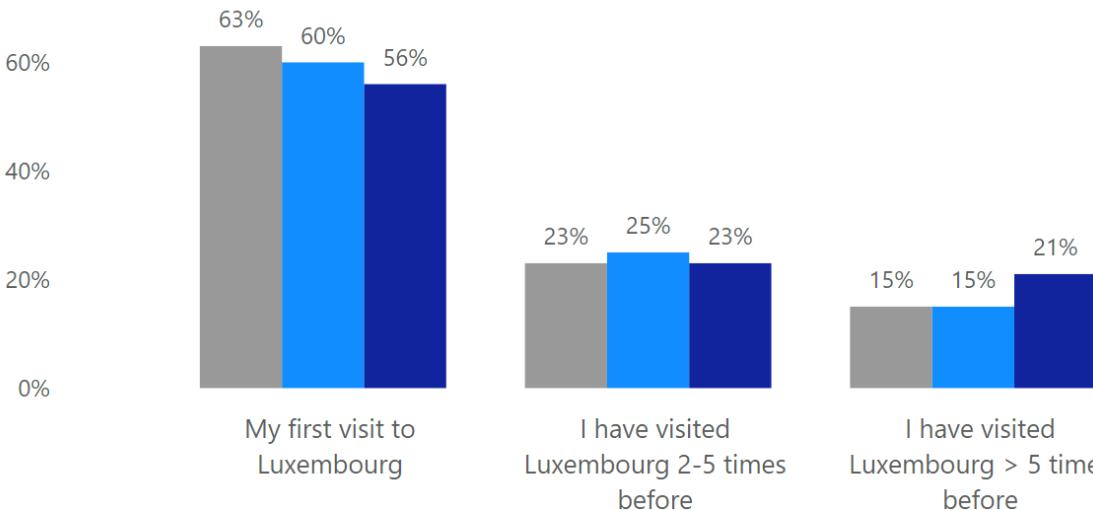
● All Inbound ● Would revisit for a longer stay



## Frequency of visit

### Visitors with overnight

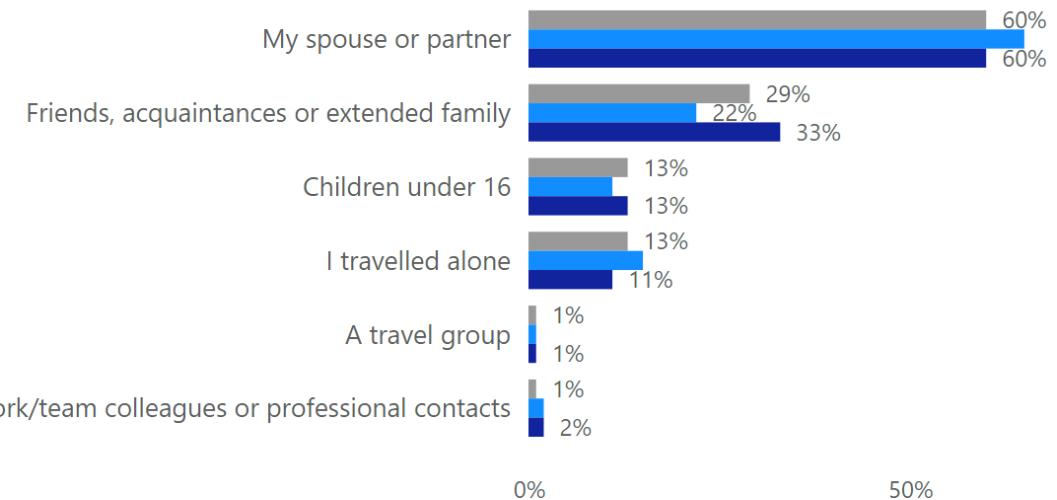
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Travel party

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay



## First-time visitors

### Visitors with overnight

**60%**

Cross-border stays

**56%**

Interest in longer stays

**63%**

All Inbound

- Visitors who would revisit for a longer stay tend to have visited Luxembourg more often.
- Travellers with friends (or extended family) are considerably more often found among visitors intending to revisit for a longer time than among cross-border visitors.
- The same observations can also be made for same-day visitors (see next page).

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

### Visitors with overnight

**100%**

Cross-border stays

**35%**

Interest in longer stays

**39%**

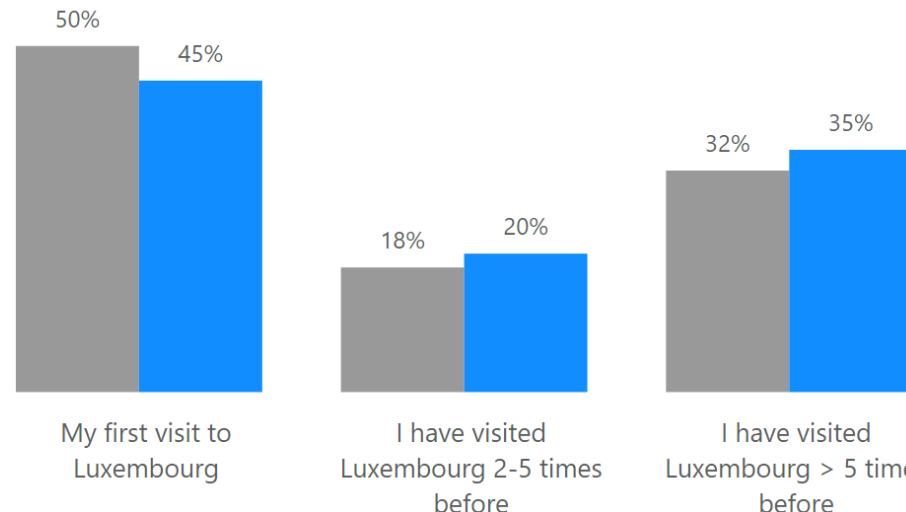
All Inbound

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

## Frequency of visit

### Same-day visitors

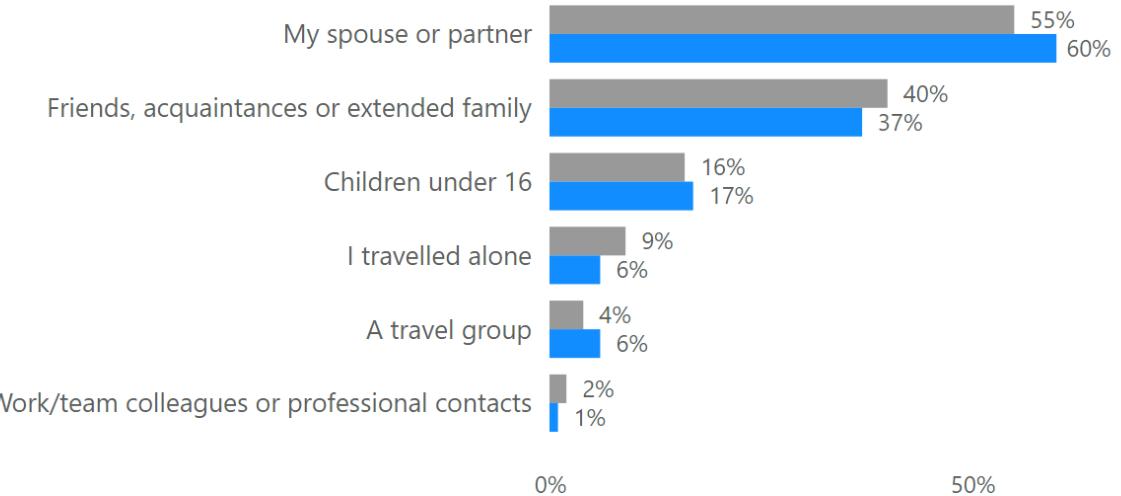
● All Inbound ● Would revisit for a longer stay



## Travel party

### Same-day visitors

● All Inbound ● Would revisit for a longer stay



## First-time visitors

### Same-day visitors

**45%**

Interest in longer stays

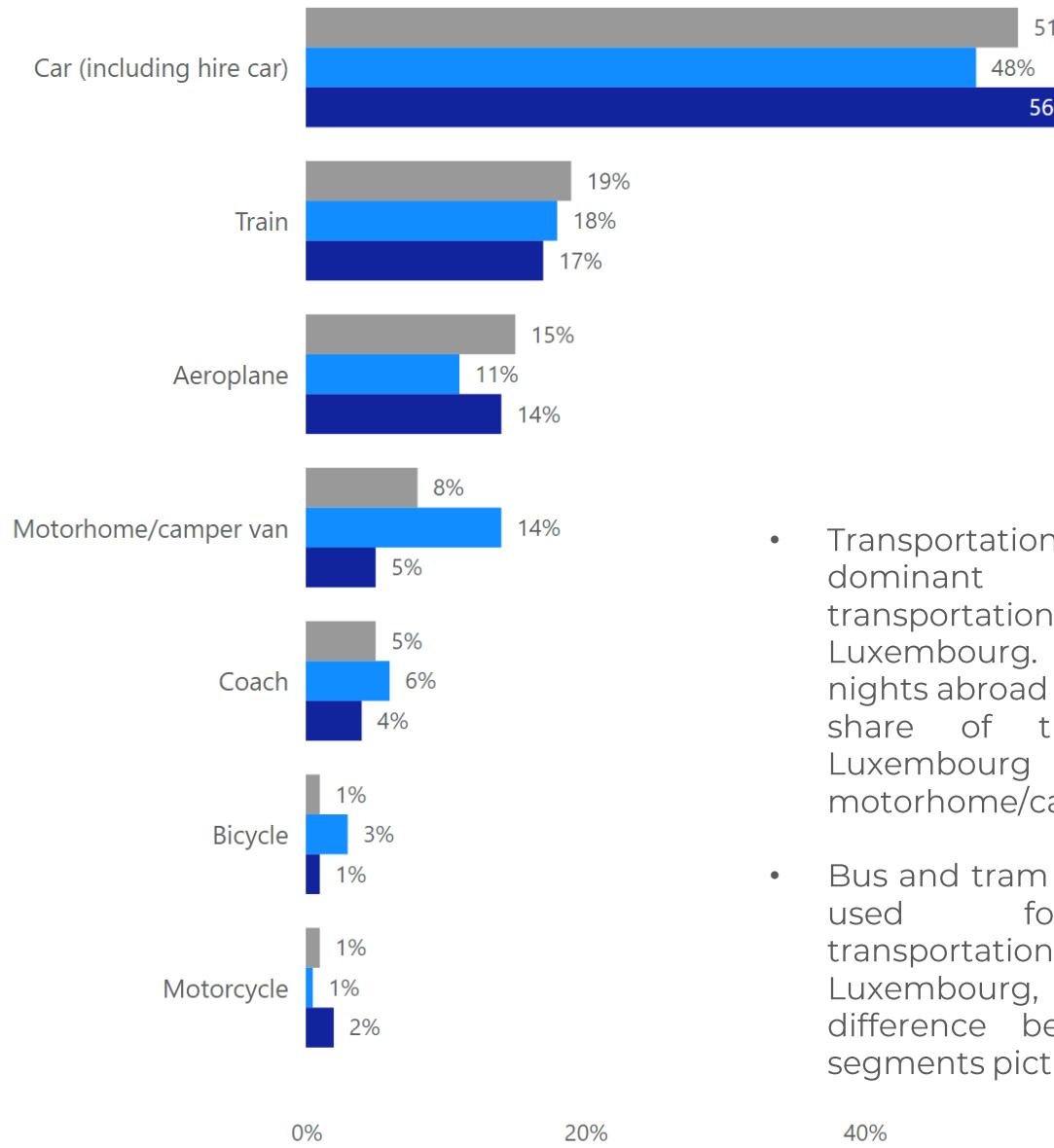
**50%**

All Inbound

## Transport to destination

### Visitors with overnight

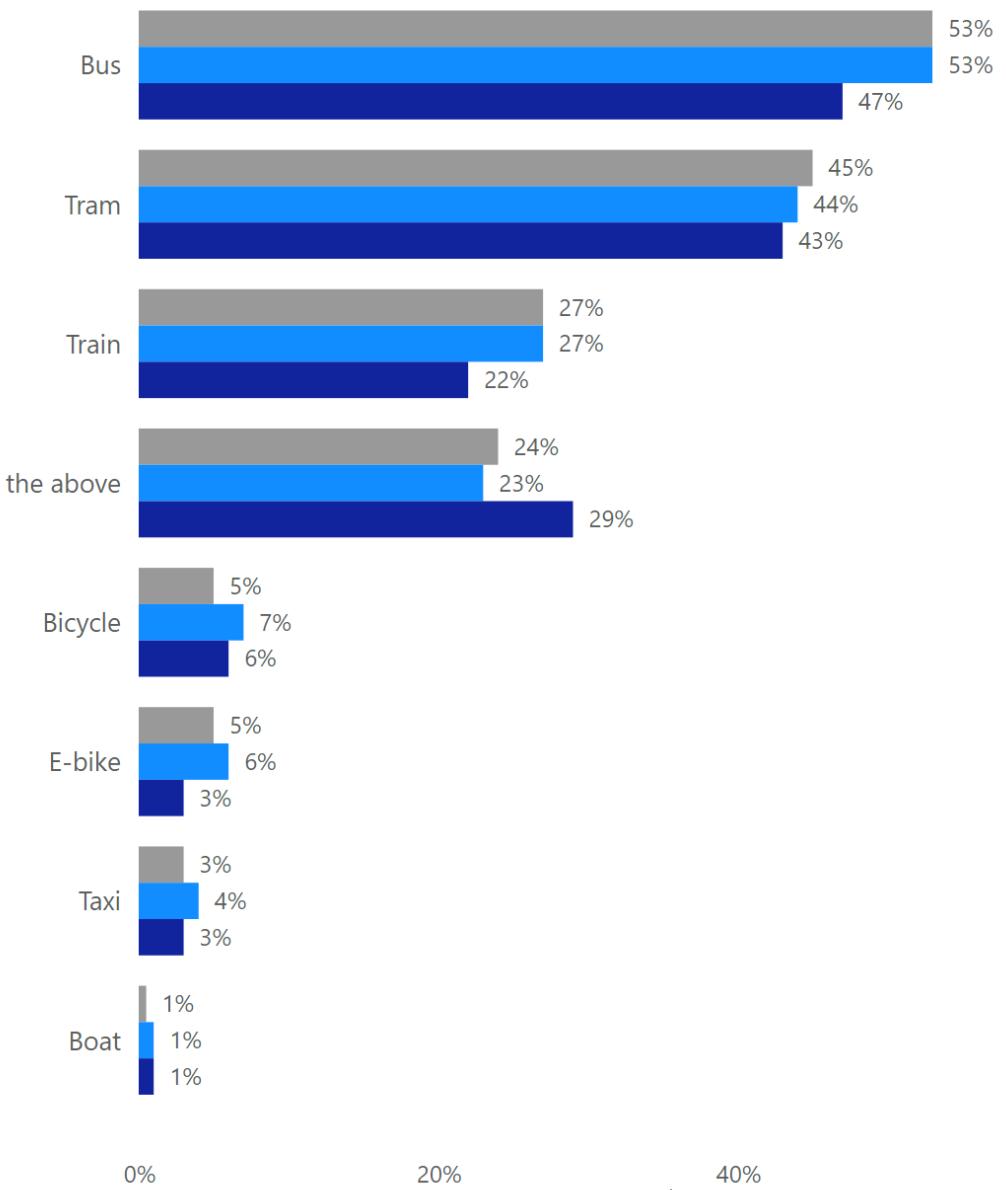
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Transport in destination

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

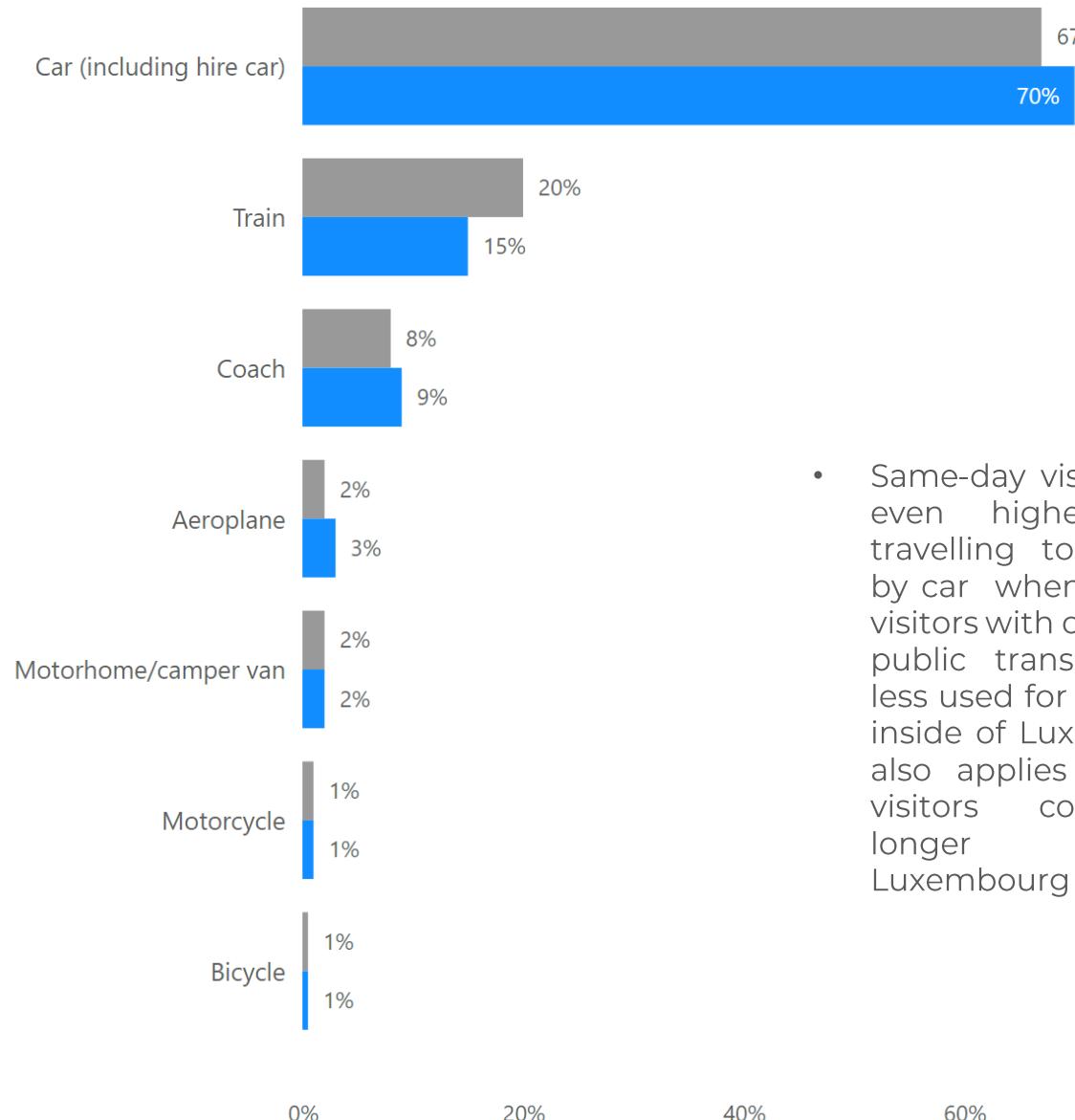


- Transportation by car is the dominant form of transportation to Luxembourg. Visitors with nights abroad show a larger share of travelling to Luxembourg by motorhome/camper van.
- Bus and tram are the most used forms of transportation inside of Luxembourg, with little difference between sub-segments pictured here.

## Transport to destination

### Same-day visitors

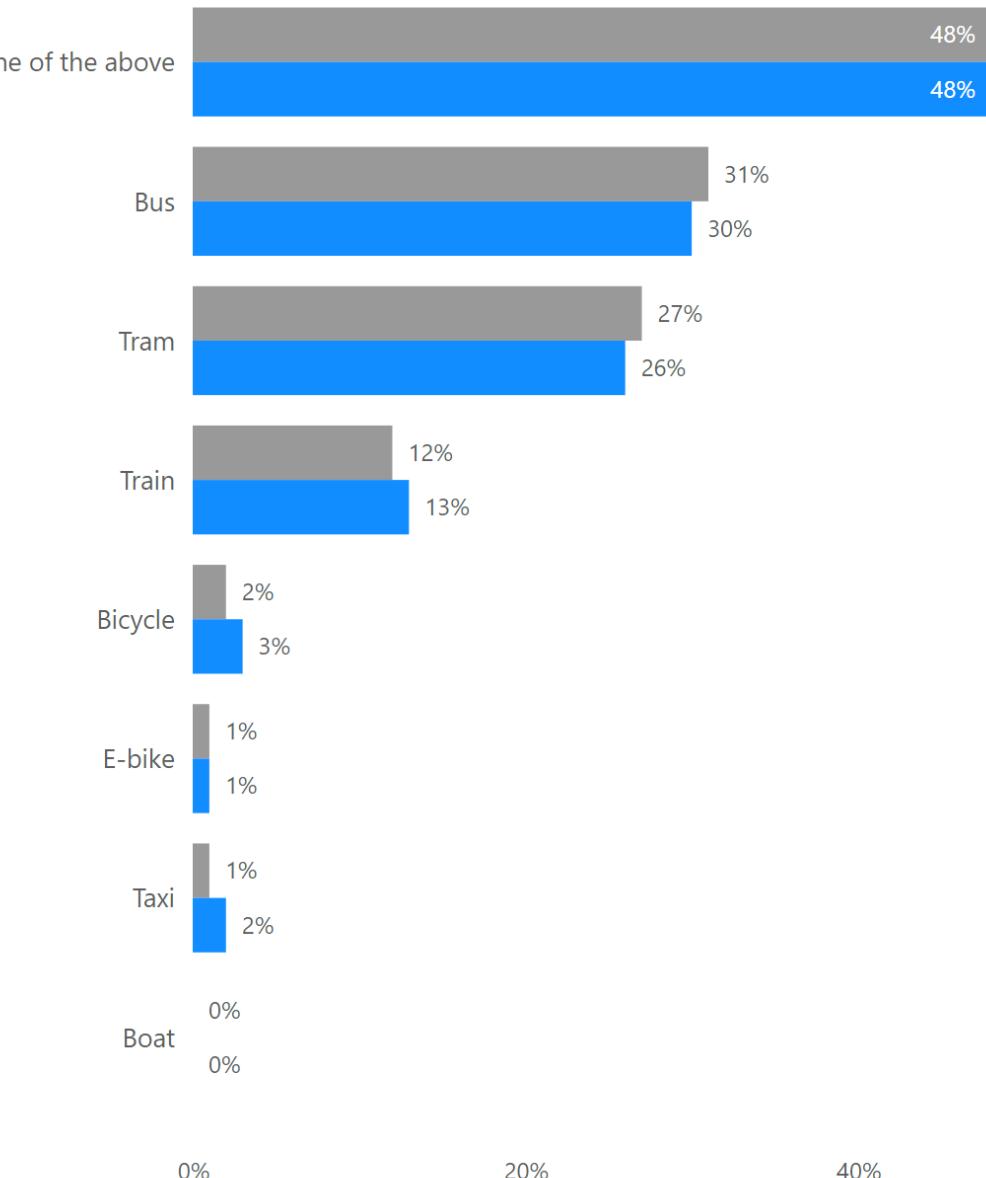
● All Inbound ● Would revisit for a longer stay



## Transport in destination

### Same-day visitors

● All Inbound ● Would revisit for a longer stay

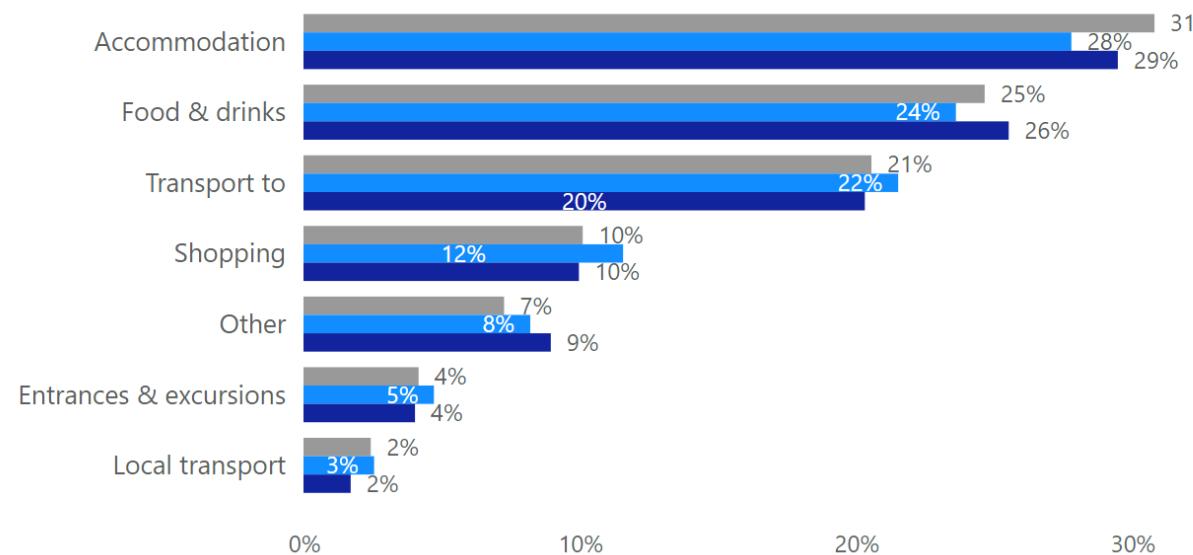


- Same-day visitors show an even higher share of travelling to Luxembourg by car when compared to visitors with overnights, and public transports are far less used for transportation inside of Luxembourg. This also applies to same-day visitors considering a longer revisit to Luxembourg in the future.

## Spending categories

### Visitors with overnight

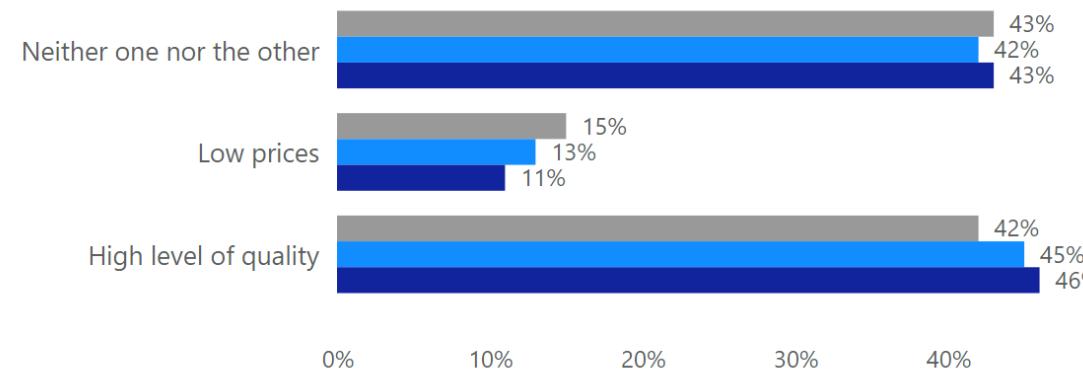
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Quality vs. price orientation

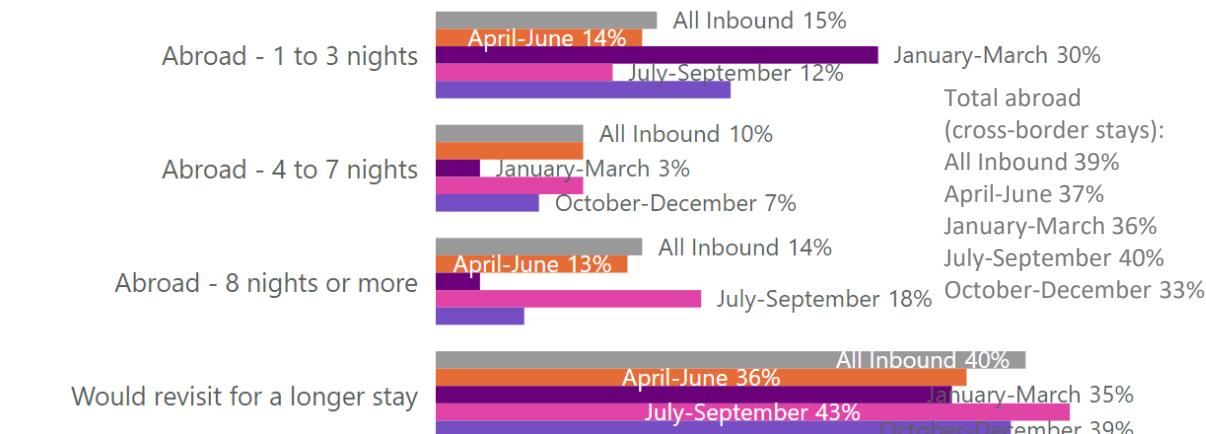
### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Shares by arrival months

### Visitors with overnight



- Spending categories as well as quality vs. price orientation do not differ much between visitors with longer revisit intent and cross-border visitors. Visitors in autumn/winter tend to less often combine Luxembourg with another destination during their trip.

### Visitors with overnight

### Visitors with overnight

### Visitors with overnight

**647 €**

Cross-border stays

**161 €**

Cross-border stays

**4,0**

Cross-border stays

**505 €**

Interest in longer stays

**202 €**

Interest in longer stays

**2,5**

Interest in longer stays

**619 €**

All Inbound

**160 €**

All Inbound

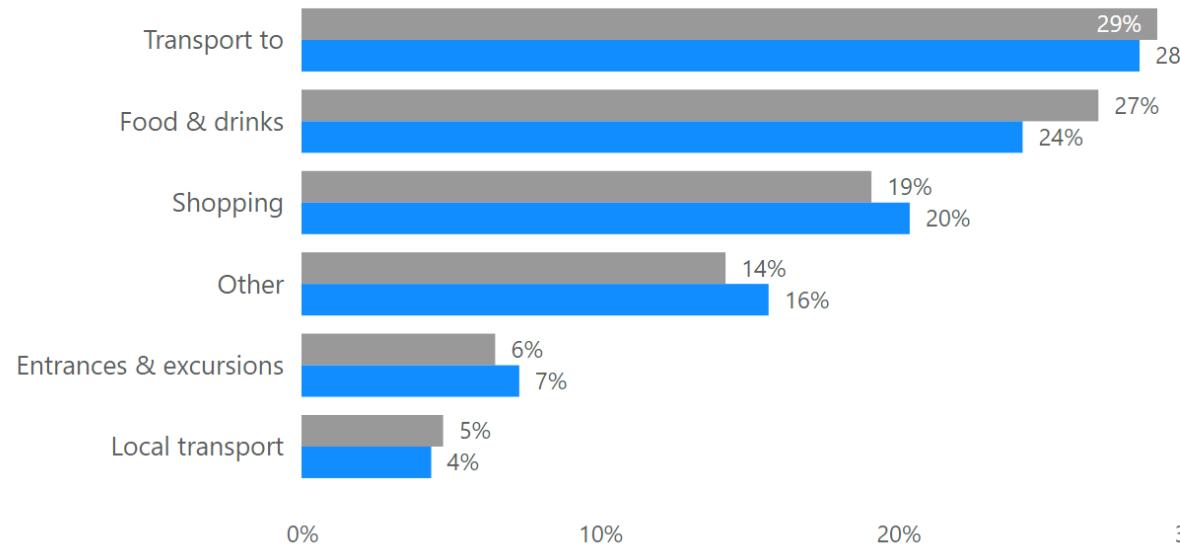
**3,9**

All Inbound

## Spending categories

### Same-day visitors

● All Inbound ● Would revisit for a longer stay



### Spend/pers./exc urs.

#### Same-day visitors

217 €

Interest in longer stays

245 €

All Inbound

## Shares by arrival months

### Same-day visitors

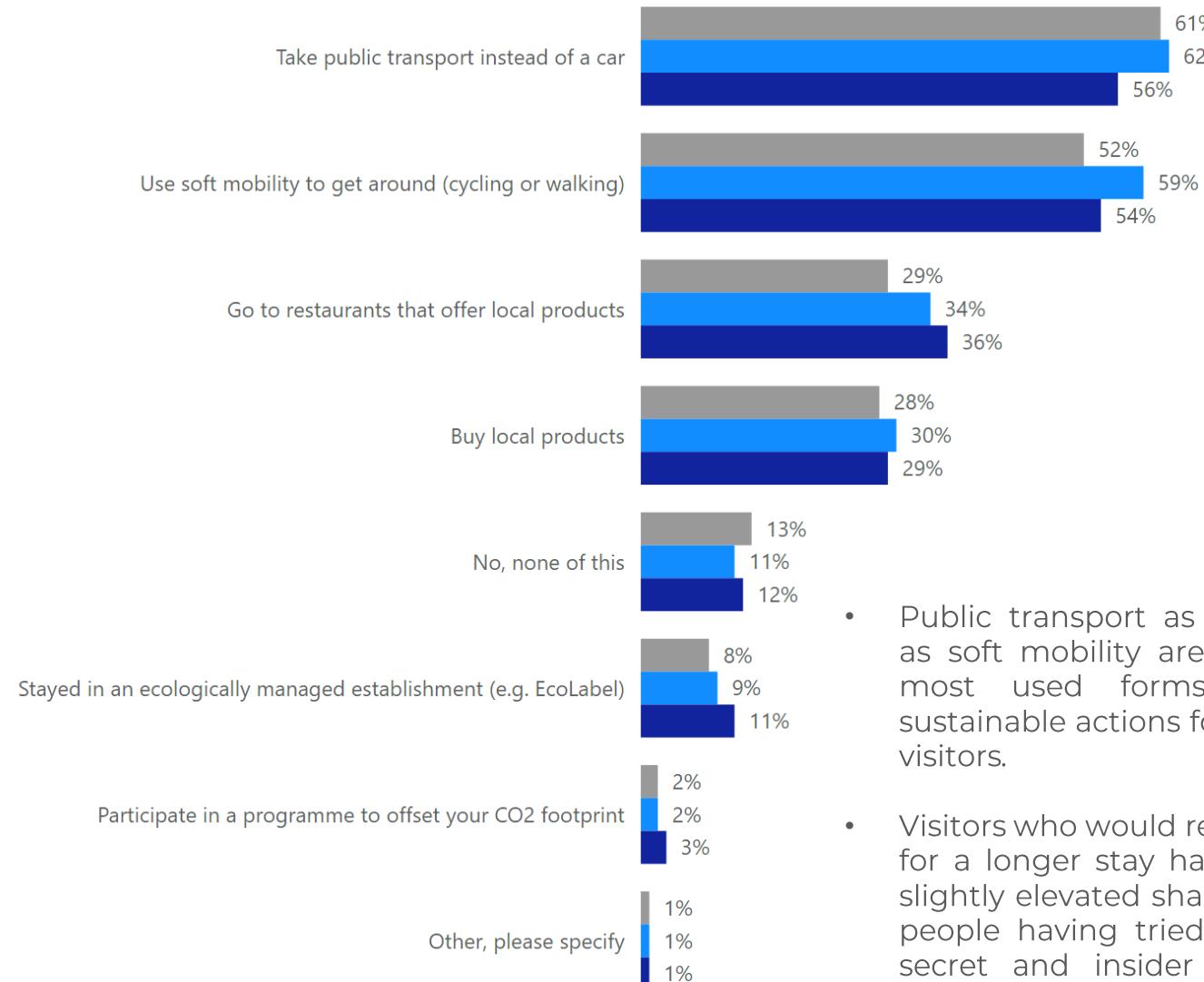
Would revisit for a longer stay



## Sustainable actions during stay

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

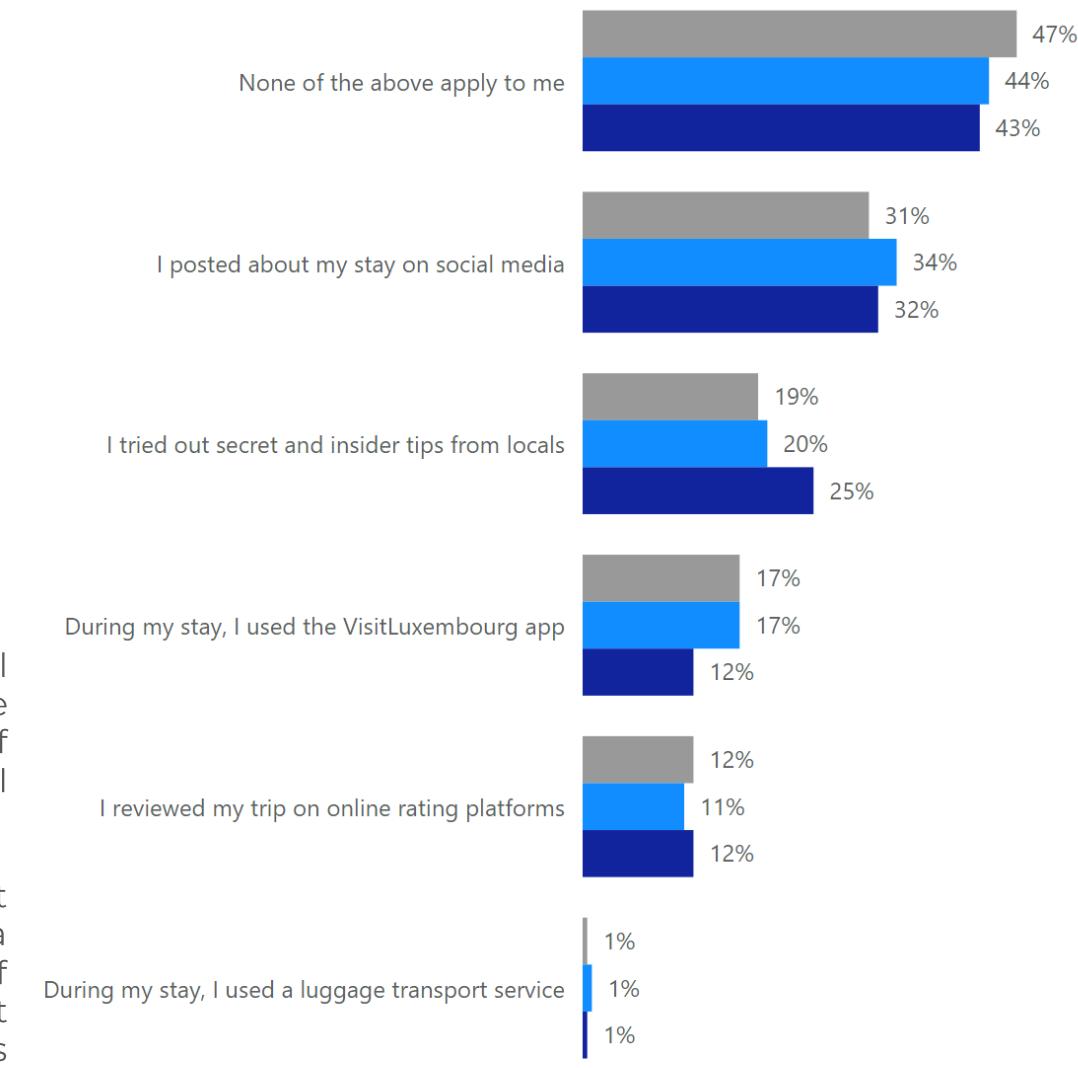


- Public transport as well as soft mobility are the most used forms of sustainable actions for all visitors.
- Visitors who would revisit for a longer stay have a slightly elevated share of people having tried out secret and insider tips from locals.

## Services used during stay

### Visitors with overnight

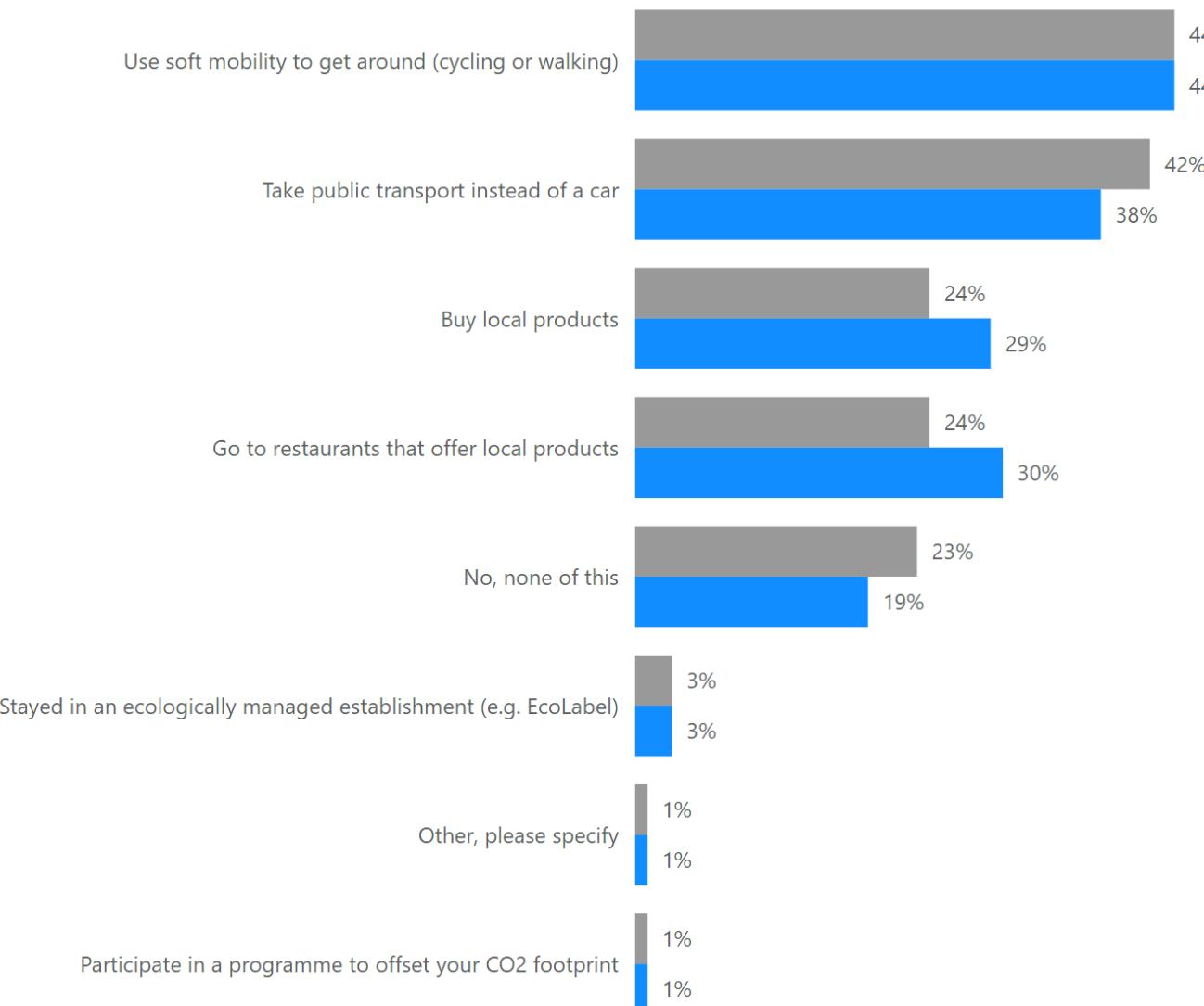
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Sustainable actions during stay

### Same-day visitors

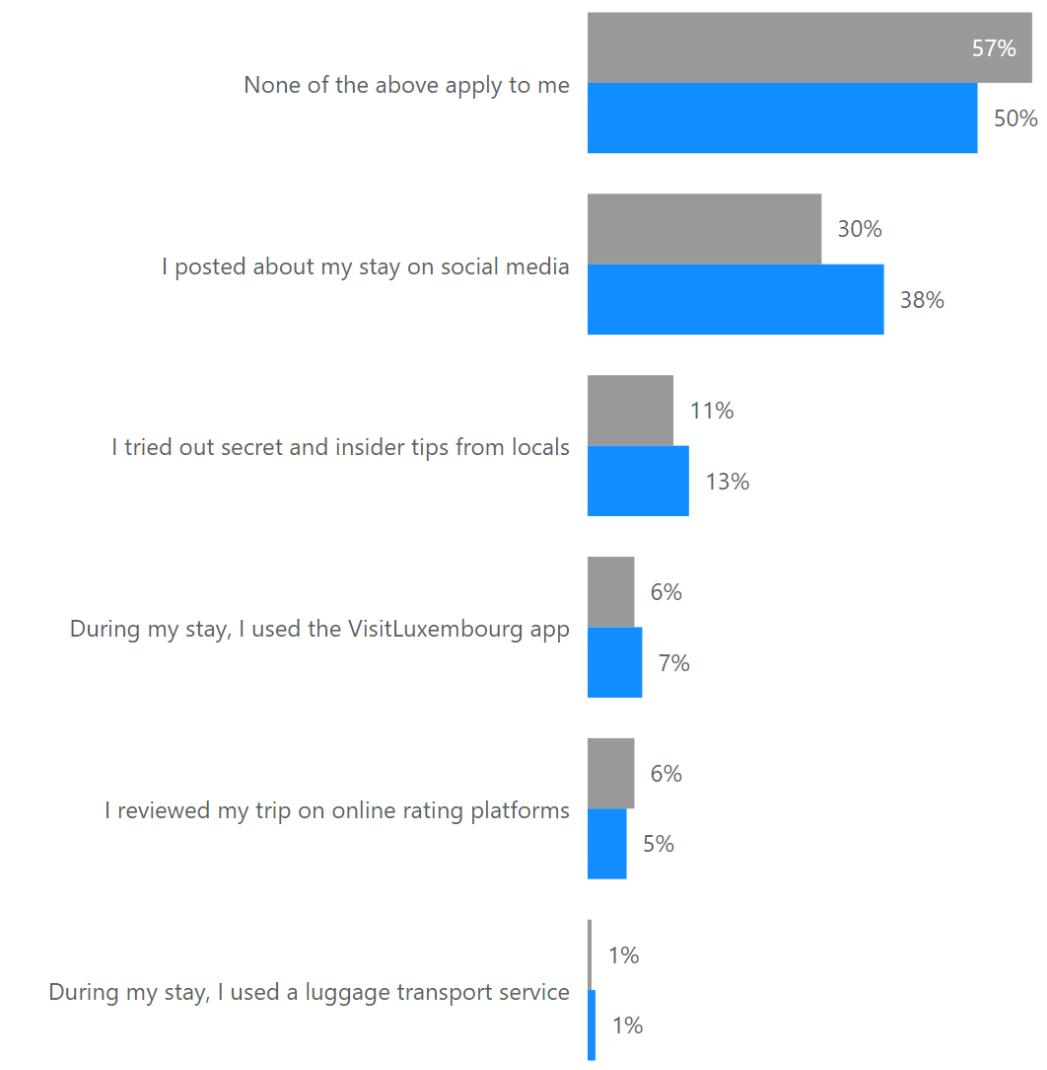
● All Inbound ● Would revisit for a longer stay



## Services used during stay

### Same-day visitors

● All Inbound ● Would revisit for a longer stay

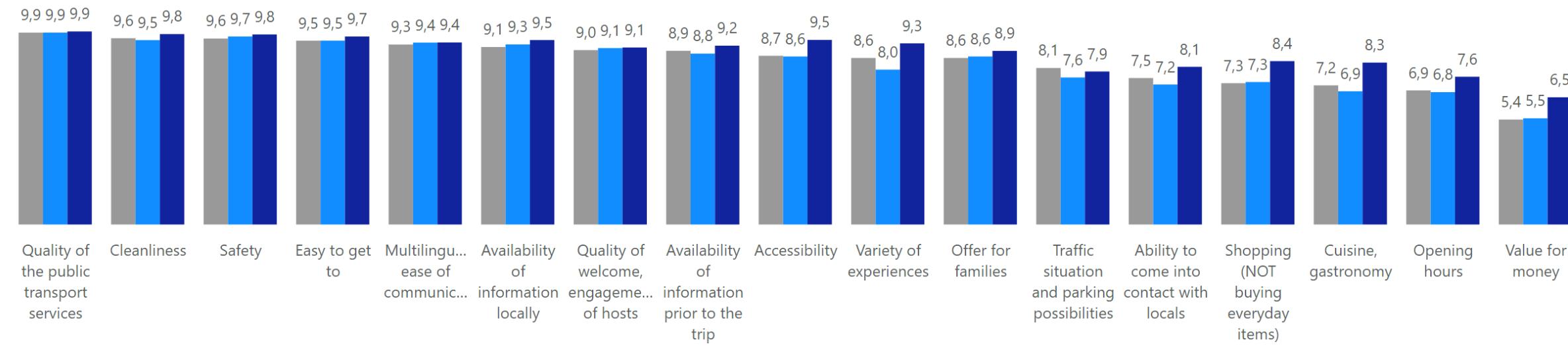


## Satisfaction items

### Visitors with overnight

Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay

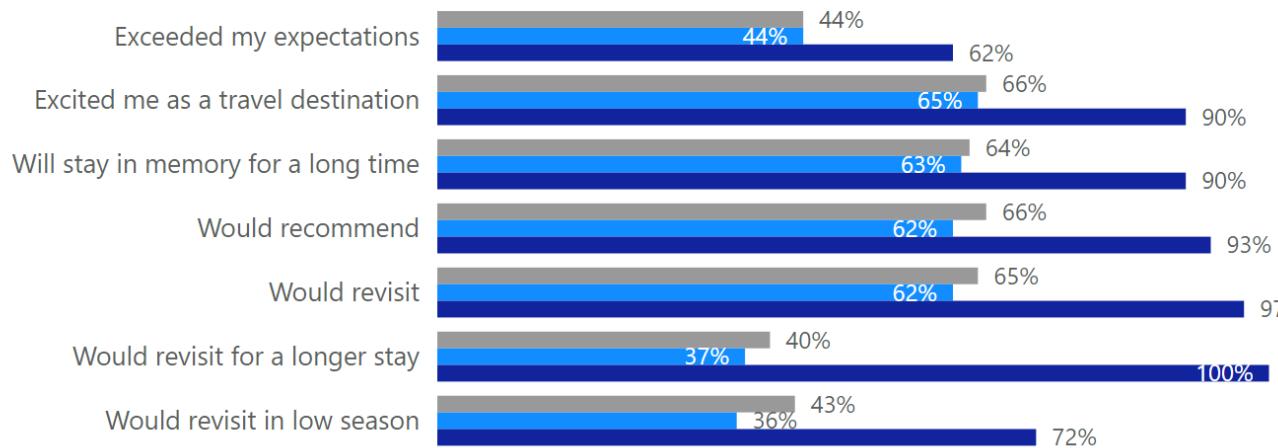
- Visitors who would revisit for a longer stay tend to show higher satisfaction across the different categories (esp. shopping, gastronomy, value-for-money) as well as a higher level of overall satisfaction. Many would also return in low season. Cross-border visitors' satisfaction levels are more in line with all visitors, and are lower with regard to perceived variety of experiences.



## Overall satisfaction - % "strongly agree"

### Visitors with overnight

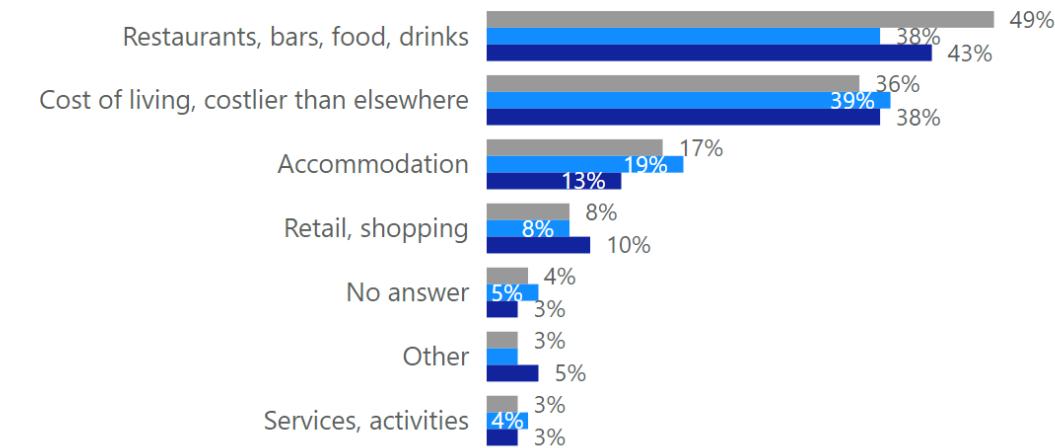
Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Reasons for poor value-for-money

### Visitors with overnight

Attribut ● All Inbound ● Nights abroad ● Would revisit for a longer stay

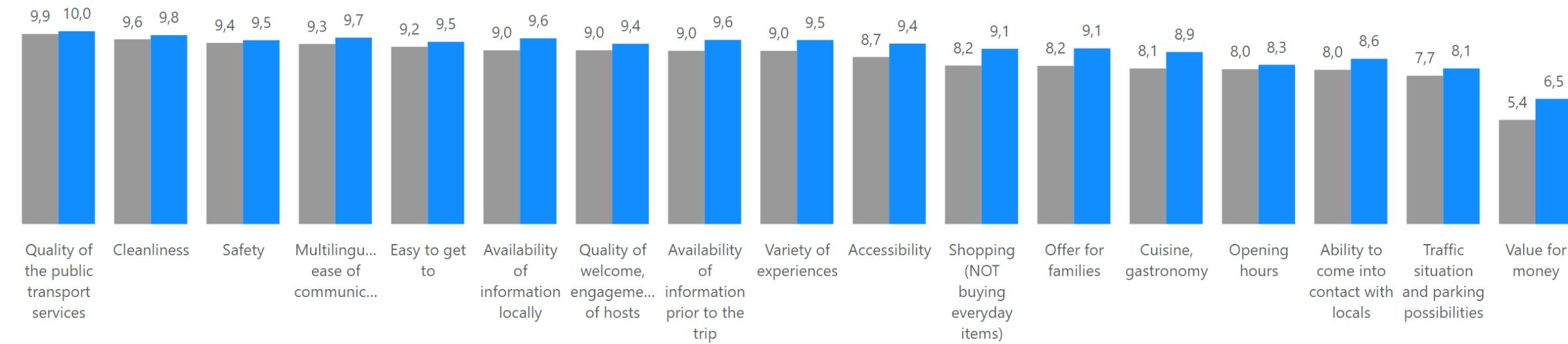


## Satisfaction items

### Same-day visitors

Attribut ● All Inbound ● Would revisit for a longer stay

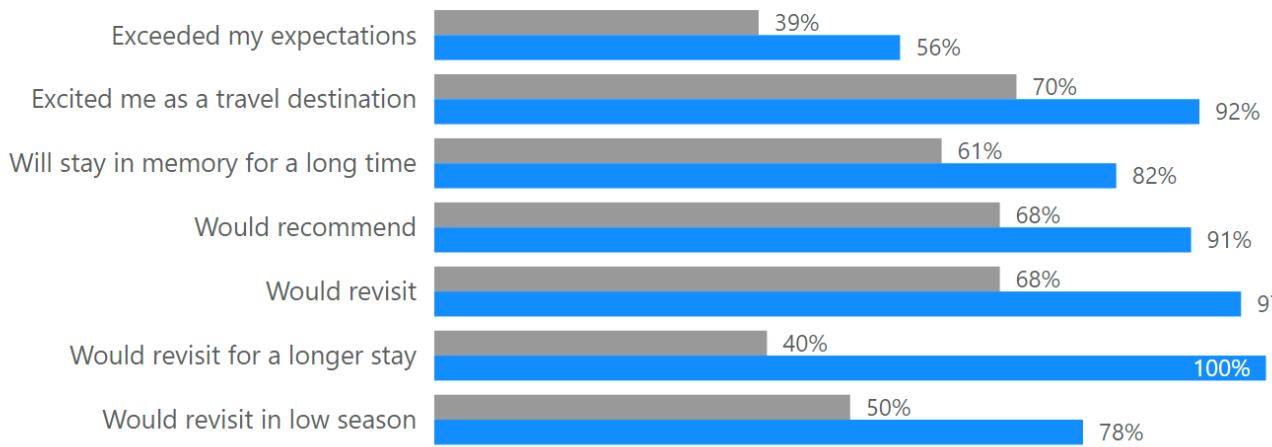
- Same-day visitors who would revisit for a longer stay also show generally higher satisfaction and would also frequently return in low season.



### Overall satisfaction - % "strongly agree"

### Same-day visitors

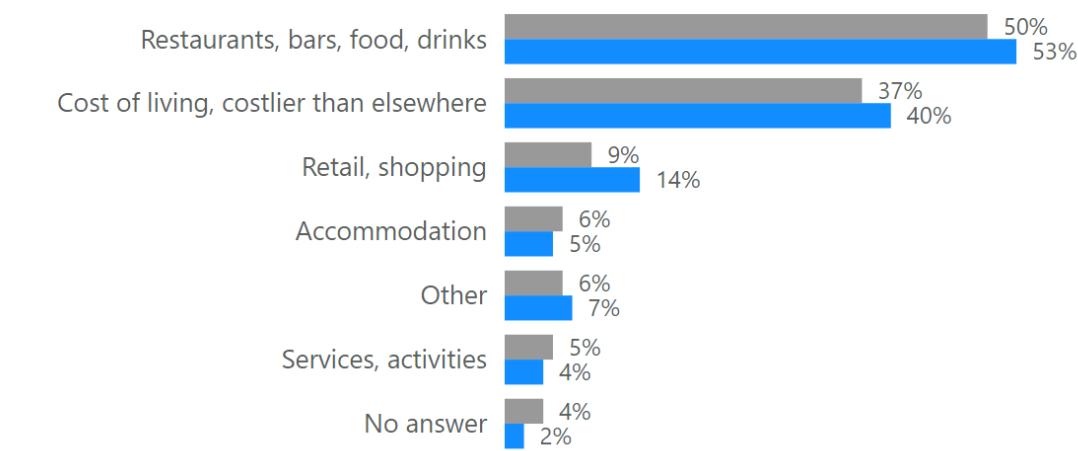
Attribut ● All Inbound ● Would revisit for a longer stay



### Reasons for poor value-for-money

### Same-day visitors

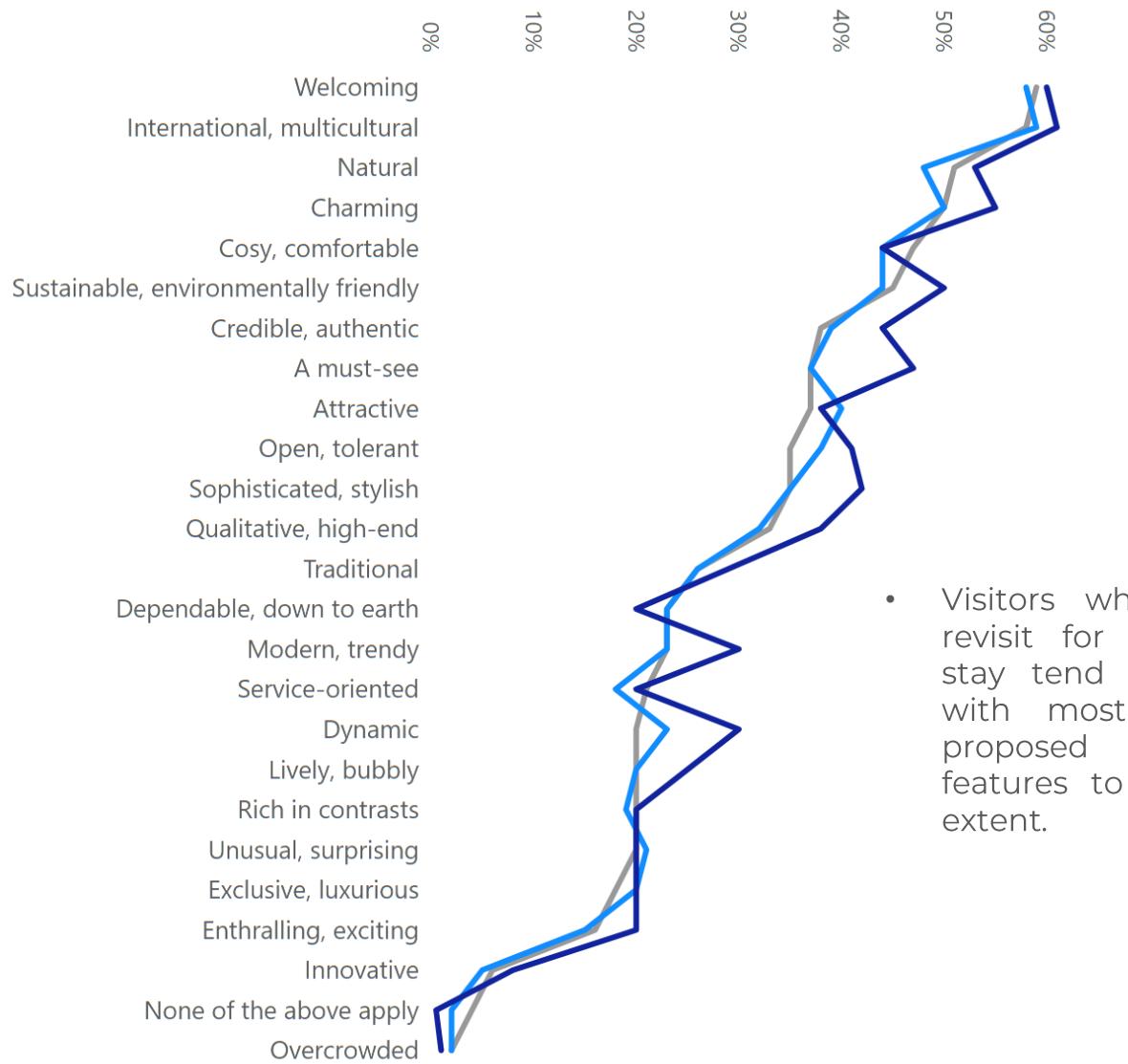
● All Inbound ● Would revisit for a longer stay



## Brand features

### Visitors with overnight

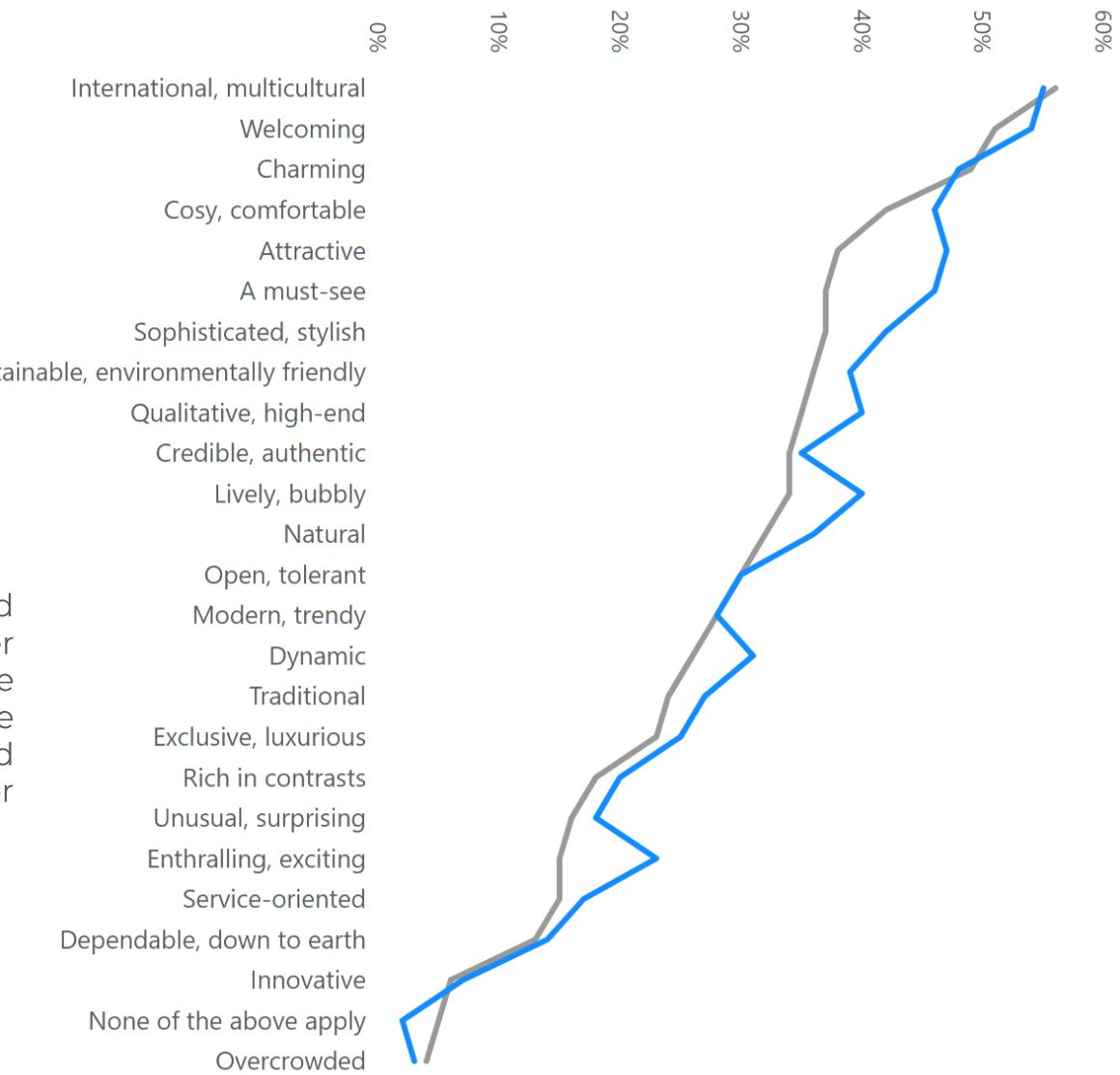
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Brand features

### Same-day visitors

● All Inbound ● Would revisit for a longer stay

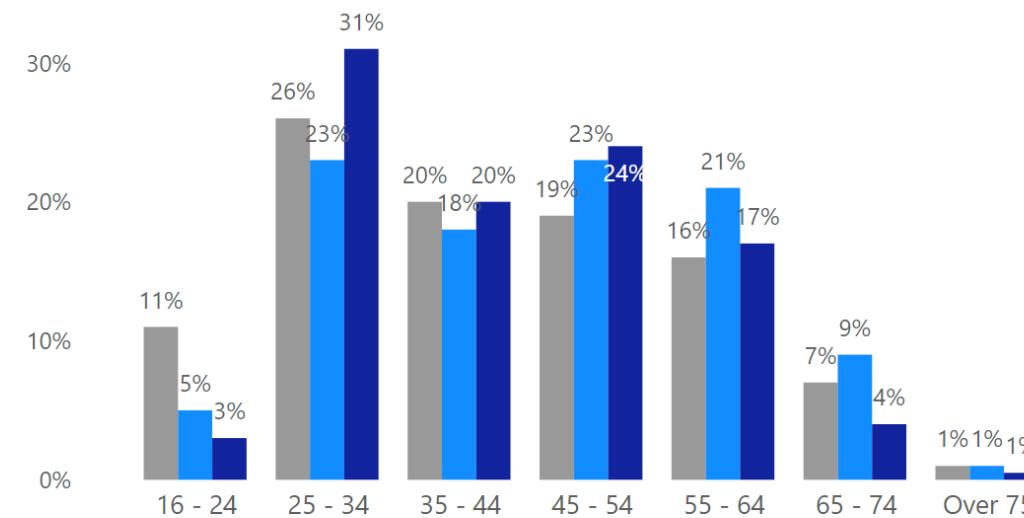


- Visitors who would revisit for a longer stay tend to agree with most of the proposed brand features to a larger extent.

## Age

### Visitors with overnight

● All Inbound ● Nights abroad ● Would revisit for a longer stay

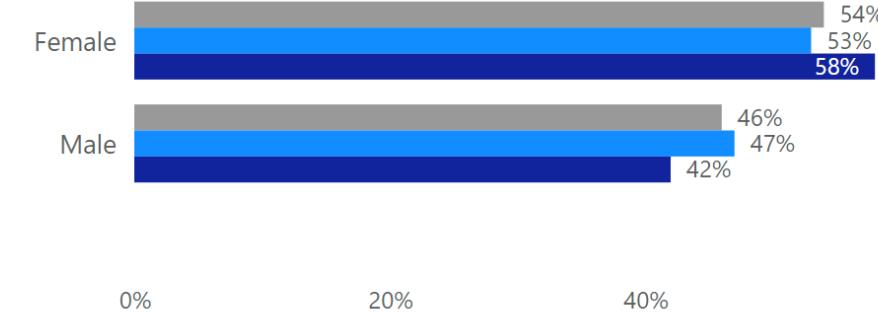


- Visitors aged 25-34 and female visitors tend a little more to revisit Luxembourg for a longer stay, while those aged 55-64 are more often combining a visit to Luxembourg with nights abroad.

## Gender

### Visitors with overnight

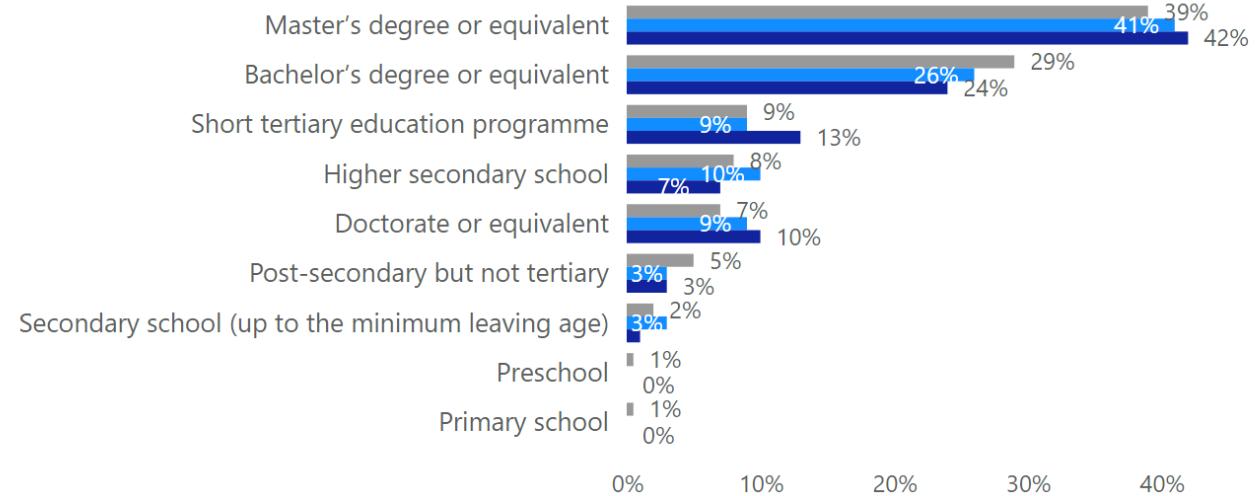
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Education

### Visitors with overnight

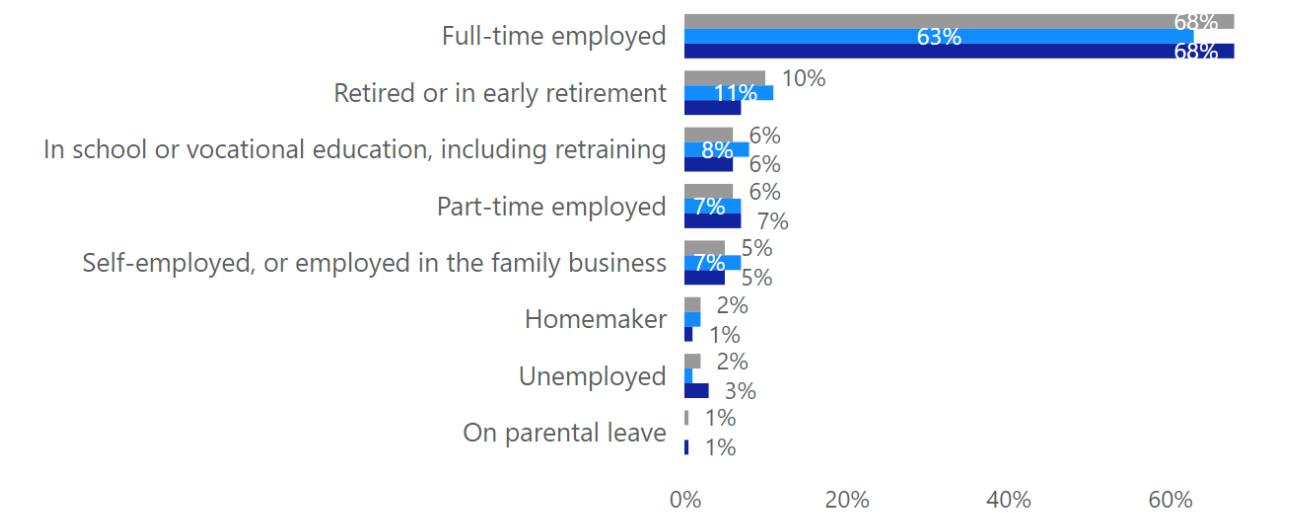
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Employment

### Visitors with overnight

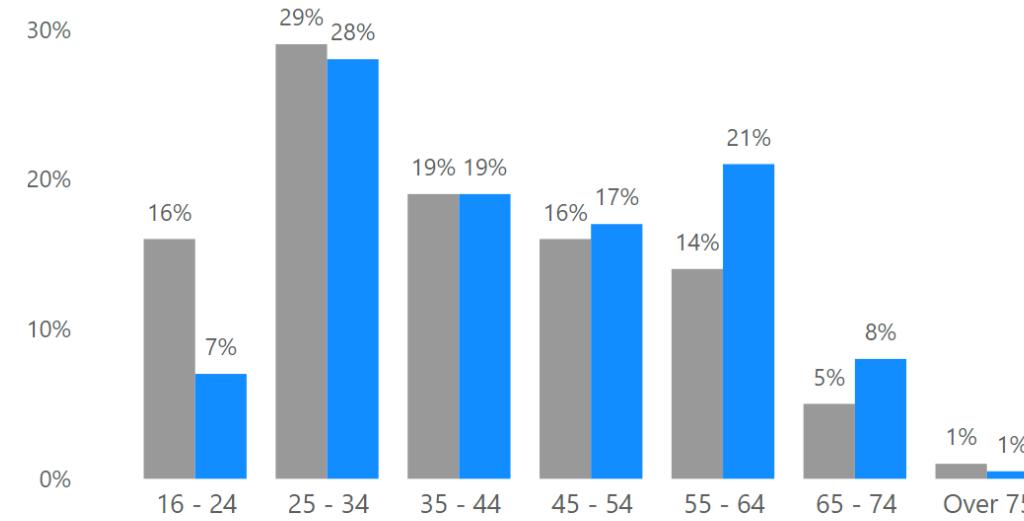
● All Inbound ● Nights abroad ● Would revisit for a longer stay



## Age

### Same-day visitors

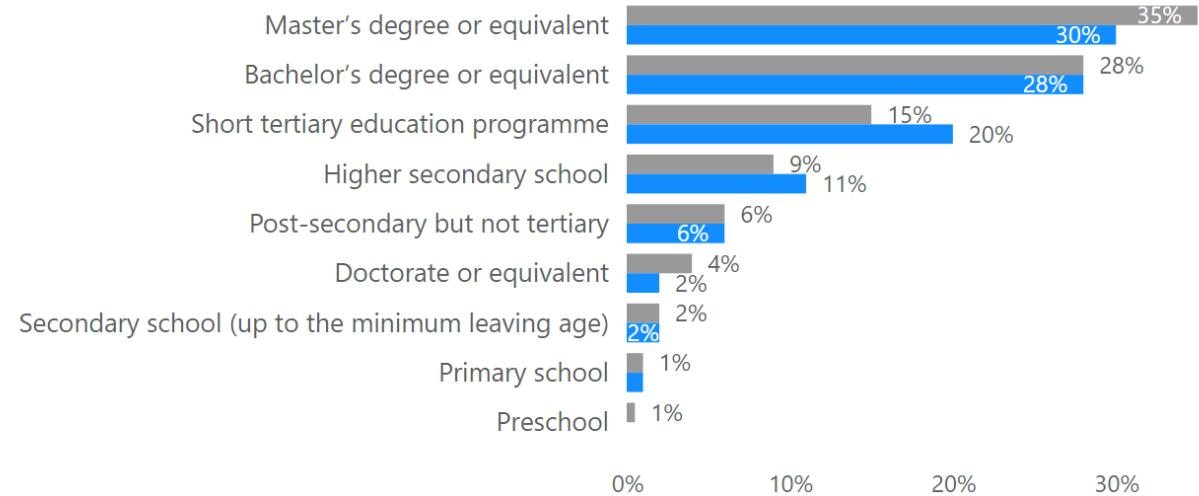
● All Inbound ● Would revisit for a longer stay



## Education

### Same-day visitors

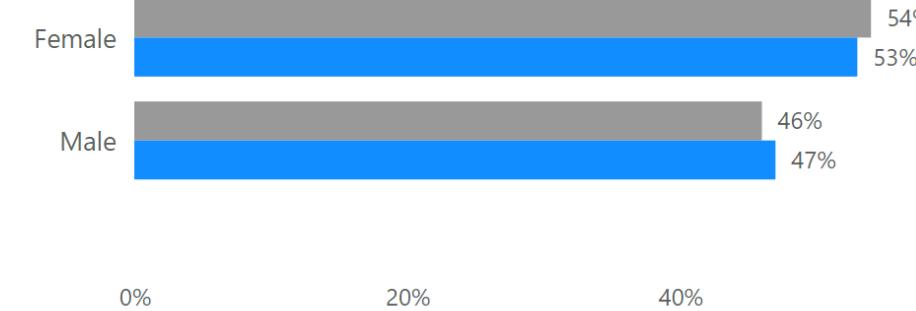
● All Inbound ● Would revisit for a longer stay



## Gender

### Same-day visitors

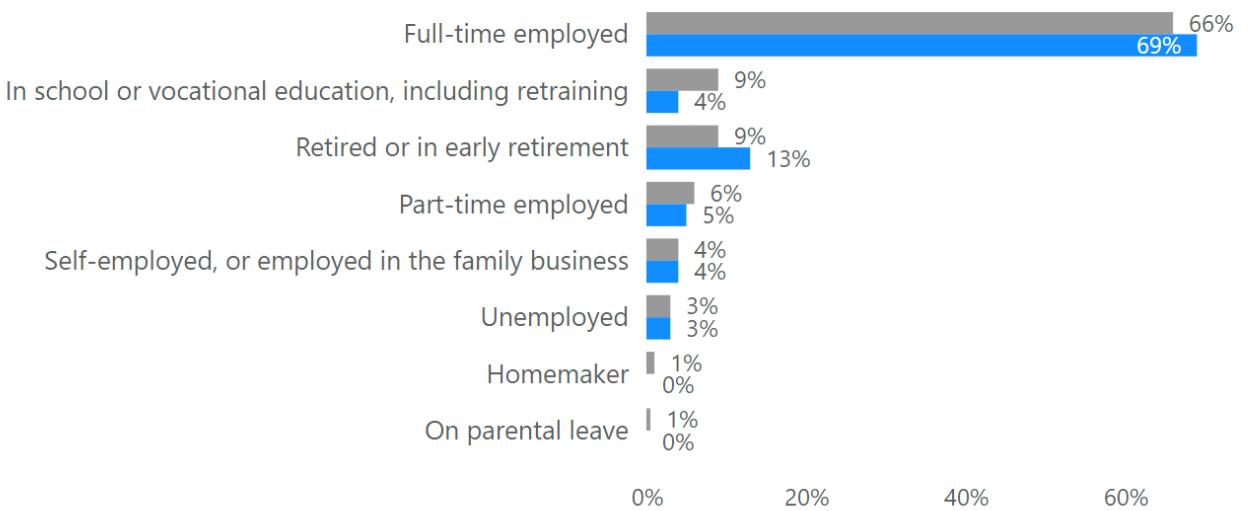
● All Inbound ● Would revisit for a longer stay



## Employment

### Same-day visitors

● All Inbound ● Would revisit for a longer stay





**Potential for longer and cross-border  
trips to Luxembourg**

# Interest for longer stays in Luxembourg (4+ nights)

(if travel intent to Luxembourg within next 3 years)



	% „interested“	„Interested“, pop., mn (*)
Average Europe	32%	-
	28%	16,9
	30%	3,8
	30%	2,0
	27%	1,8
	13%	1,1
	32%	15,0
	28%	13,5
	32%	13,7
	41%	14,1
	31%	1,1
	43%	1,8
	37%	2,7
	50%	3,7

% of respondents agreeing.

(\*) Aged 18-75.

# Interest for combining Luxembourg with another destination on same trip (if travel intent to Luxembourg within next 3 years)



	% „interested“	„Interested“, pop., mn (*)
Average Europe	48%	-
	42%	25,3
	51%	3,4
	49%	3,2
	46%	21,5
	43%	20,8
	54%	23,1
	53%	18,2

% of respondents agreeing.

(\*) Aged 18-75.

# Interest for longer stays in Luxembourg (4+ nights) and for combining Luxembourg with another destination on same trip (if travel intent to Luxembourg within next 3 years)

(Ø 9 European source markets) - LFT target segments



	„Interested“ in longer stays	„Interested“ in cross-border stays
EXP	<b>33%</b>	<b>52%</b>
NLA	<b>38%</b>	<b>48%</b>
RS	<b>32%</b>	<b>44%</b>
SB	<b>25%</b>	<b>48%</b>
PS	<b>43%</b>	<b>54%</b>
LO	<b>29%</b>	<b>46%</b>

- Among survey respondents potentially interested in travelling to Luxembourg within next 3 years, willingness to visit for a longer stay (4+ nights) is highest in the Nordics, Spain and Portugal, and lowest in Belgium. Potential Swiss, Italian and Spanish visitors are most likely to combine Luxembourg with another destination on a future trip.
- Nature-Loving Actives and Perfection Seekers most frequently show interest in longer trips to Luxembourg among Europeans considering a future trip to the Grand Duchy. Perfection Seekers would also more often combine a trip to Luxembourg with another destination.



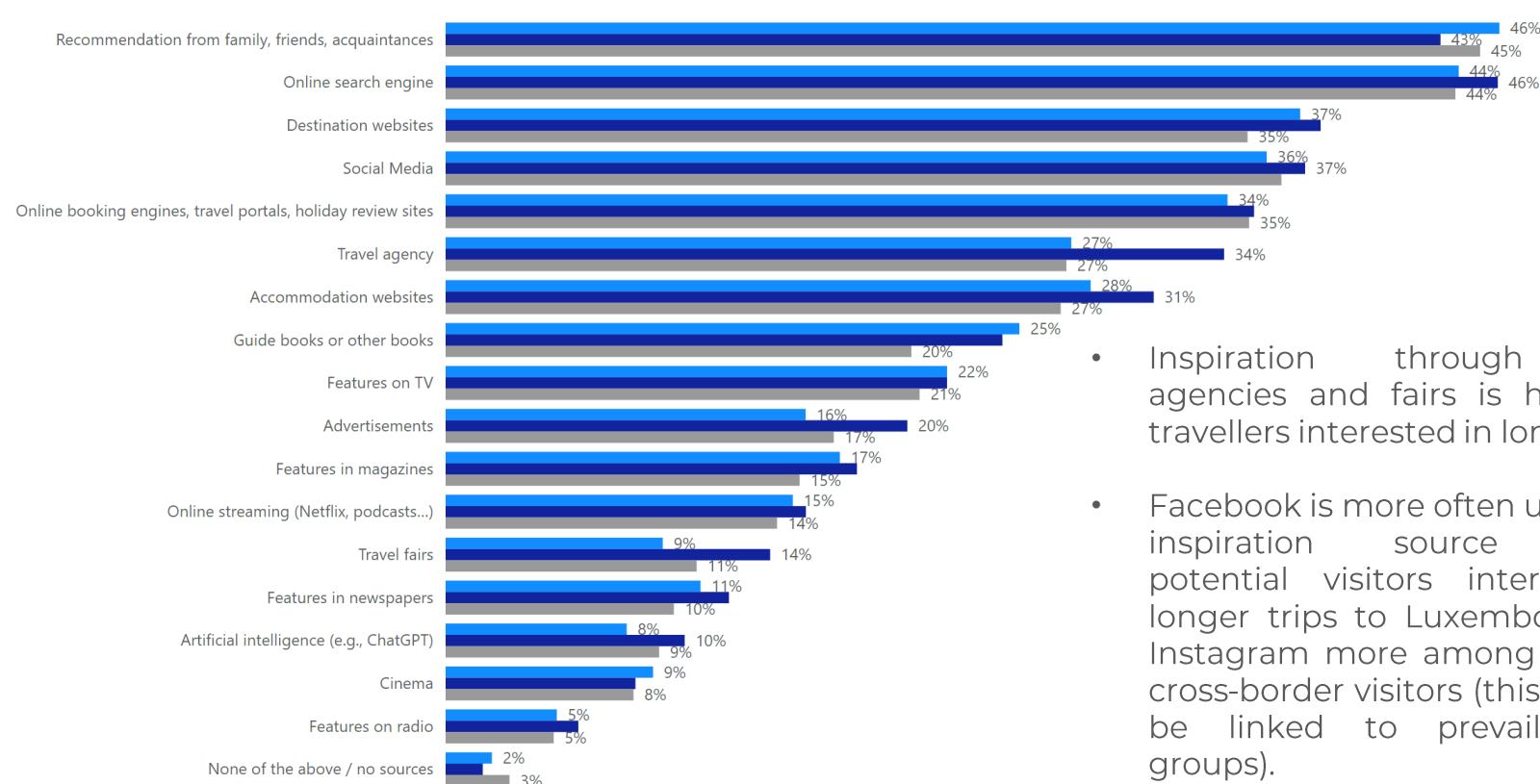
# **Trip organisation and preferences of segments interested in longer and cross-border trips to Luxembourg**



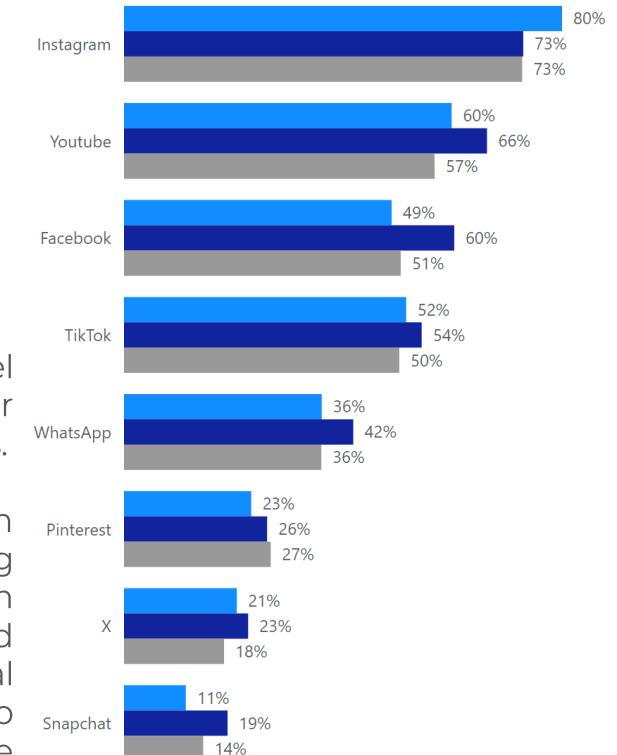
# Trip organisation and preferences (1)

— Average European source markets, total vs. travellers interested in longer & cross-border trips to Luxembourg

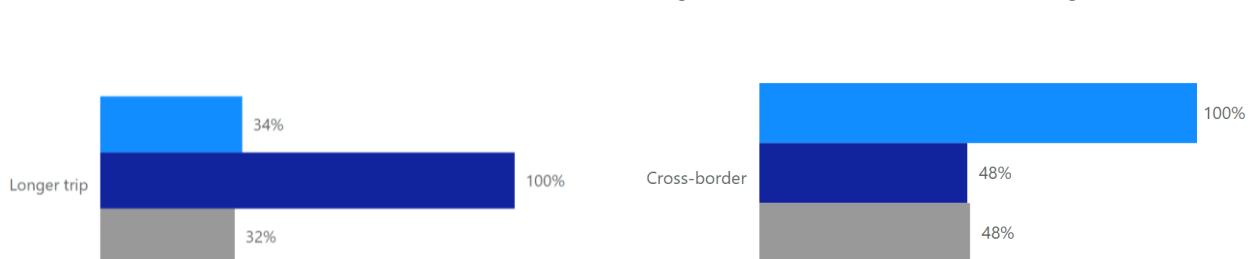
## Preferred sources of travel inspiration



- Inspiration through travel agencies and fairs is higher for travellers interested in longer trips.
- Facebook is more often used as an inspiration source among potential visitors interested in longer trips to Luxembourg, and Instagram more among potential cross-border visitors (this may also be linked to prevailing age groups).



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

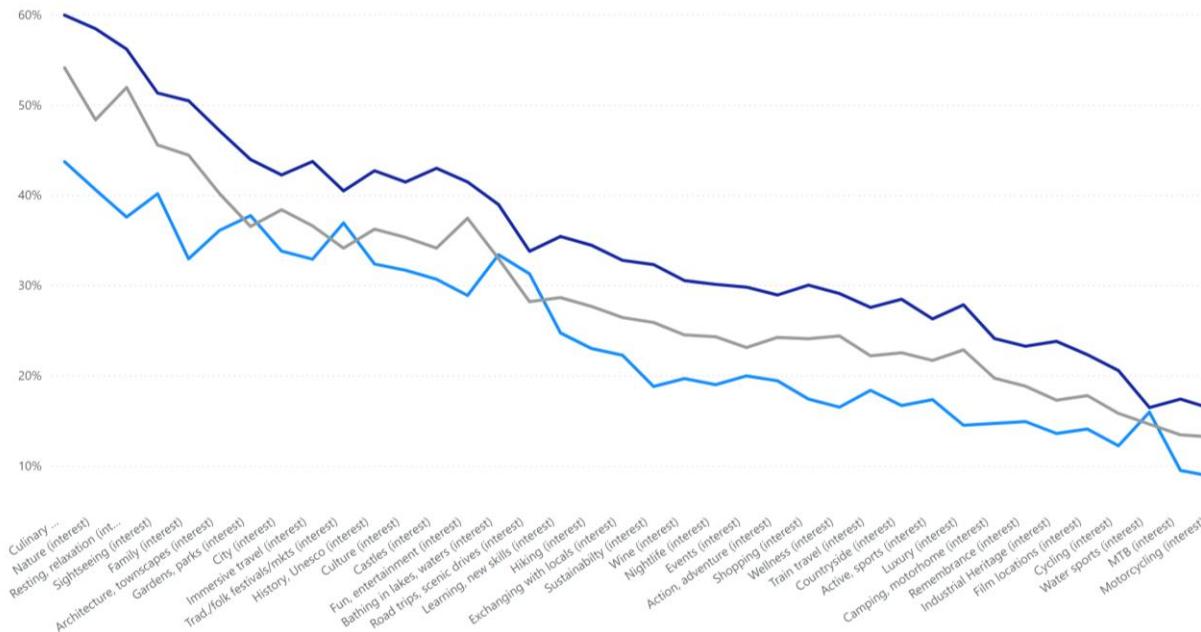


# Trip organisation and preferences (2)

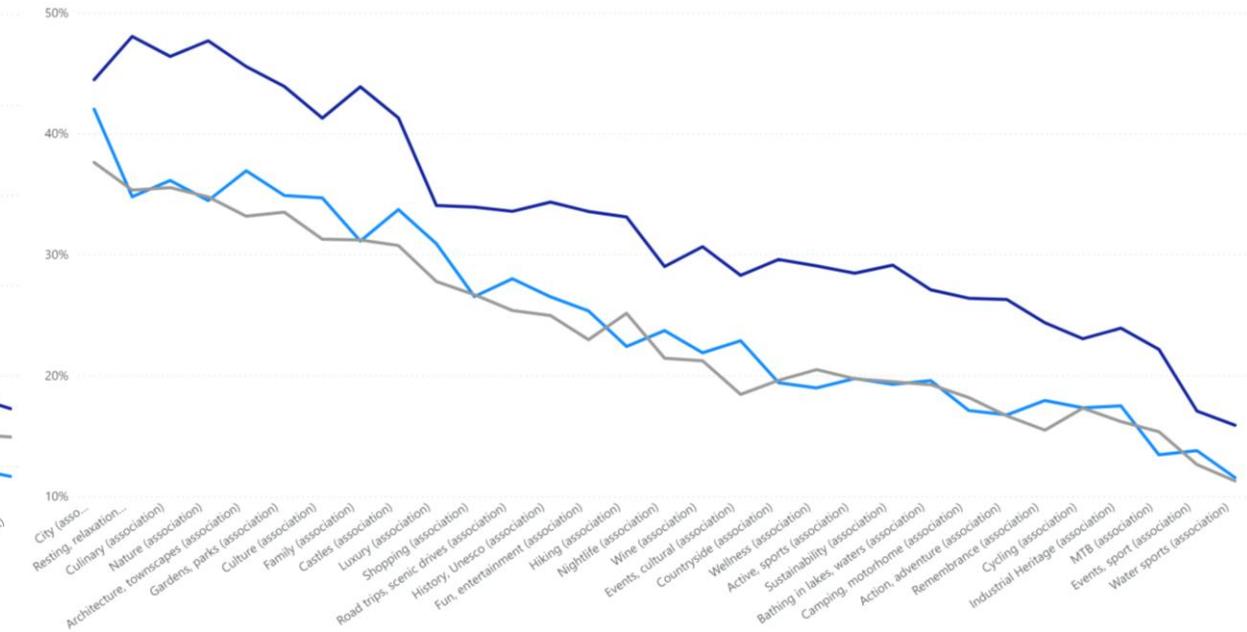
— Average European source markets, total vs. travellers interested in longer & cross-border trips to Luxembourg



General theme interest (when going on a holiday)



Luxembourg's perceived theme suitability



- Travellers interested in longer trips show a higher general theme interest and also perceive Luxembourg's theme suitability higher.
- Travellers interested in cross-border trips to Luxembourg generally show lower shares in theme interest and are largely in line with all respondents with regard to Luxembourg's perceived theme competence (although they do rate Luxembourg more suitable in some aspects such as city, culture, castles).

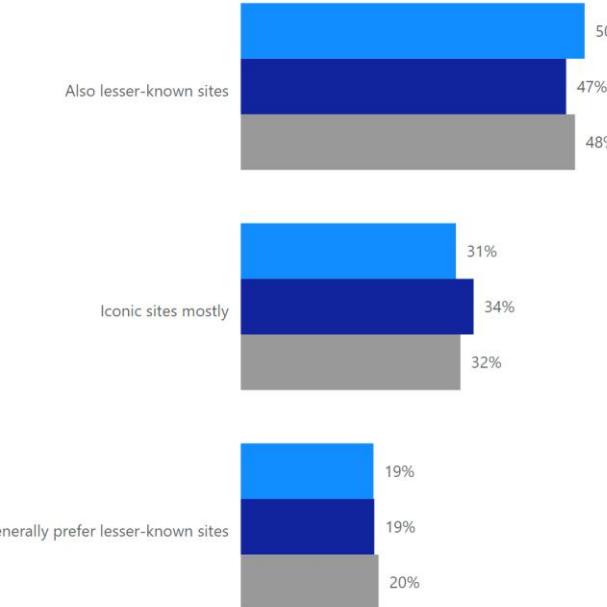


# Trip organisation and preferences (3)

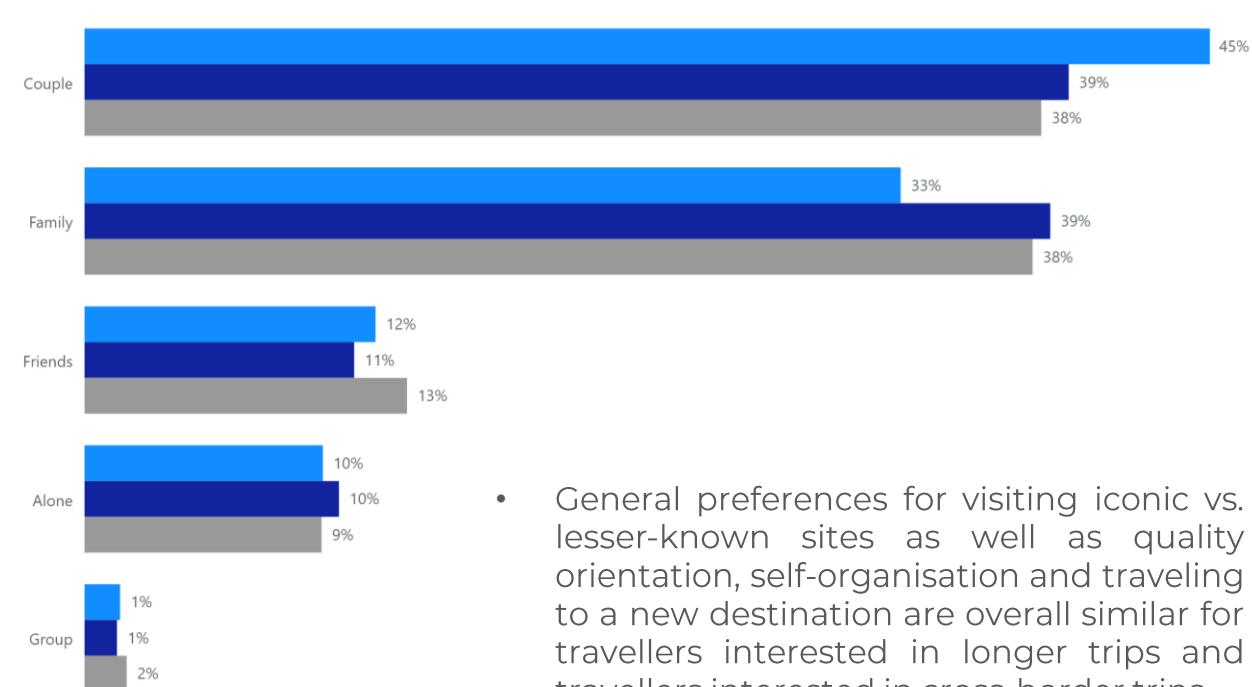
— Average European source markets, total vs. travellers interested in longer & cross-border trips to Luxembourg

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

- Cross-border
- Longer trip
- Total

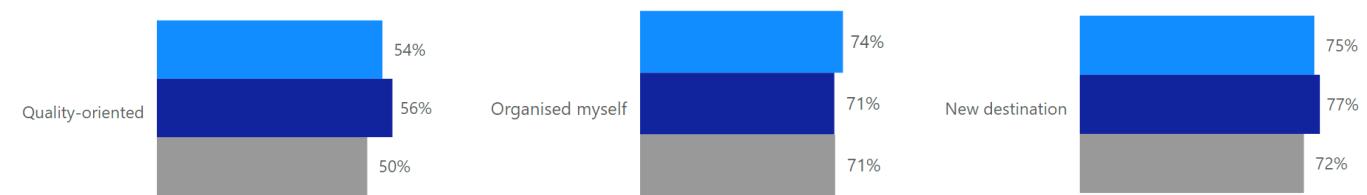


## Travel party (\*)



- General preferences for visiting iconic vs. lesser-known sites as well as quality orientation, self-organisation and traveling to a new destination are overall similar for travellers interested in longer trips and travellers interested in cross-border trips.
- Travel parties show slight differences with couples being more represented for travellers interested in cross-border trips and travellers interested in longer trips traveling more often with their families.

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



(\*) During last outbound holiday trip .

(\*\*) During last outbound holiday trip: had travelled to a destination never visited before.  
Source: LFT Brand & Potential Study, 2024.



# Your contact

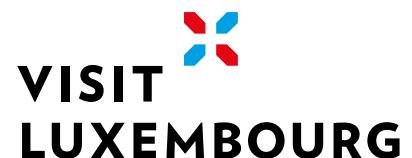


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