



**QUALITY-ORIENTED & SUSTAINABLE\* travellers**

Luxembourg for Tourism

**Theme profile**

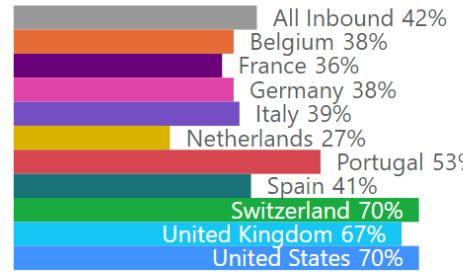
**2024**

(\* key travel motive)

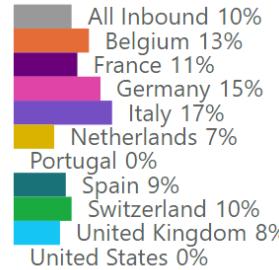


# **Market size of quality-oriented and sustainable travellers segments**

High level of quality



Travelling as sustainably and ecologically...



0%

50%

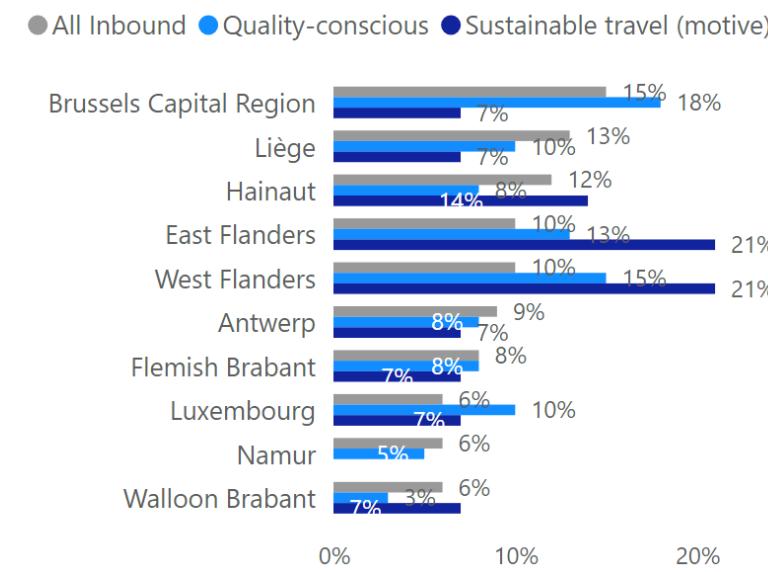
## Number of overnight leisure trips to Luxembourg (estimate, yearly average 2023/2024)



- Switzerland, the UK and the US show particularly high shares of quality-oriented visitors to Luxembourg.
- Italy and Germany indicate the largest share for sustainably travelling visitors to Luxembourg.

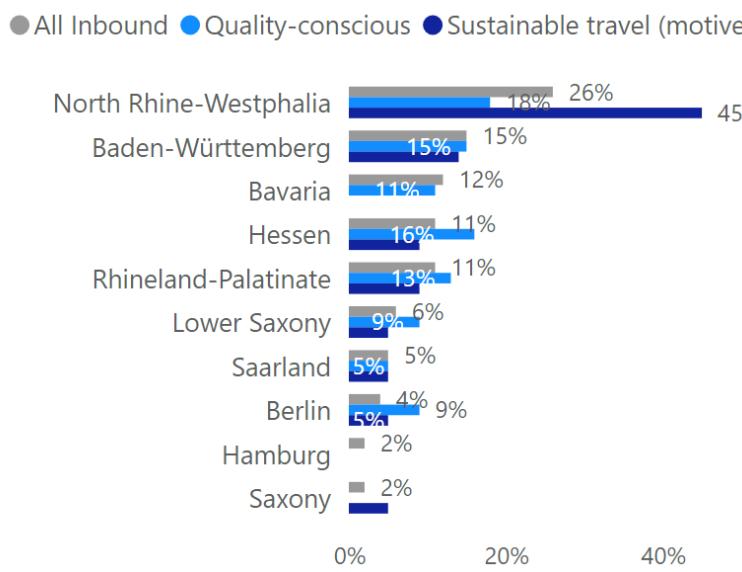
## Region of origin (BE)

### Visitors with overnight



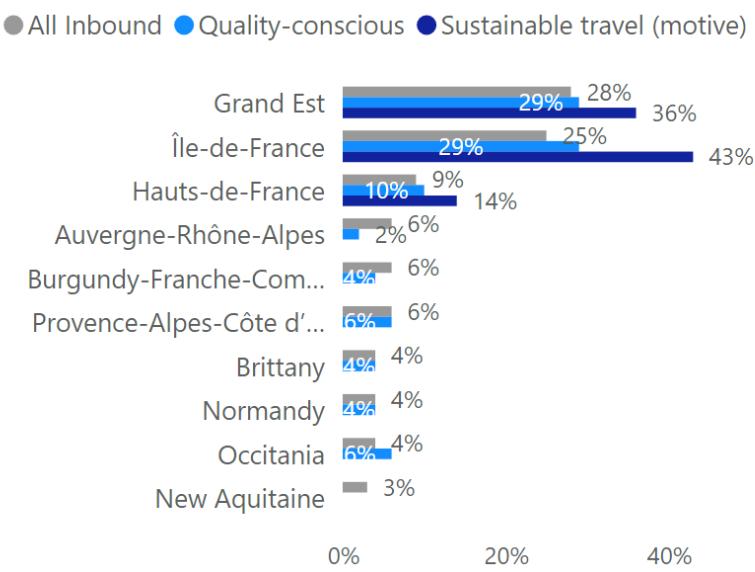
## Region of origin (DE)

### Visitors with overnight



## Region of origin (FR)

### Visitors with overnight



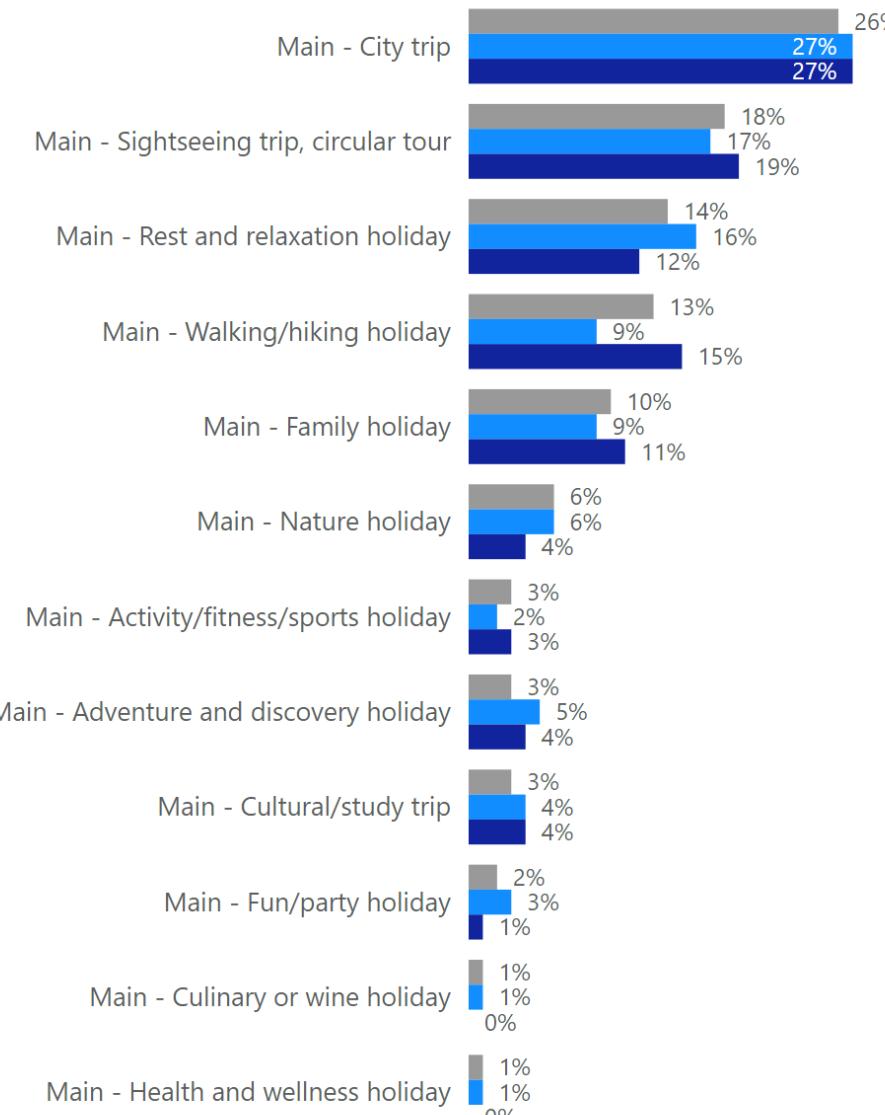


# **Travel behaviour of quality-oriented and sustainable travellers in Luxembourg**

## Main holiday types

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## All holiday types

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

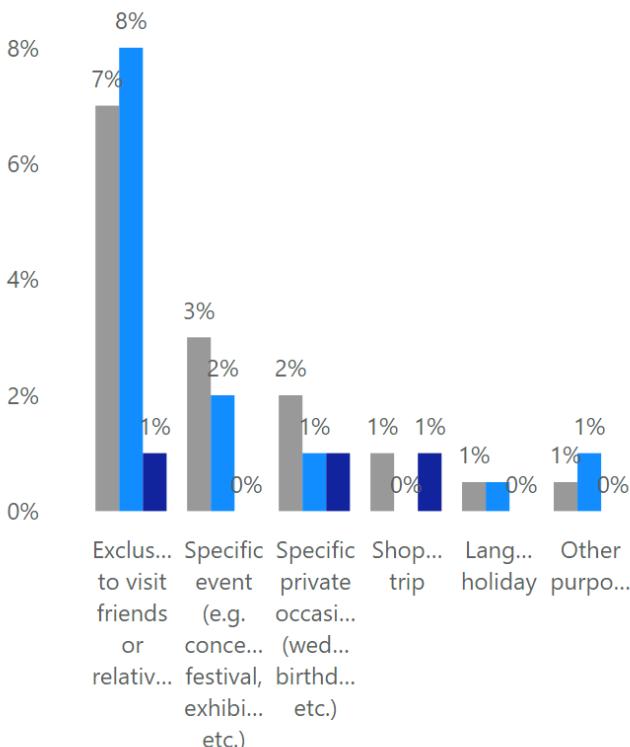


- Nature-related holidays as well as hiking trips are more popular among sustainable travellers whereas relaxation holidays are a bit more often chosen by quality-oriented visitors.

## Main purpose of overnight trip

### (if not holiday)

● All Inbound ● Quality-conscious ● Sustainable travel (motive)



# Reasons for choosing Luxembourg

## Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

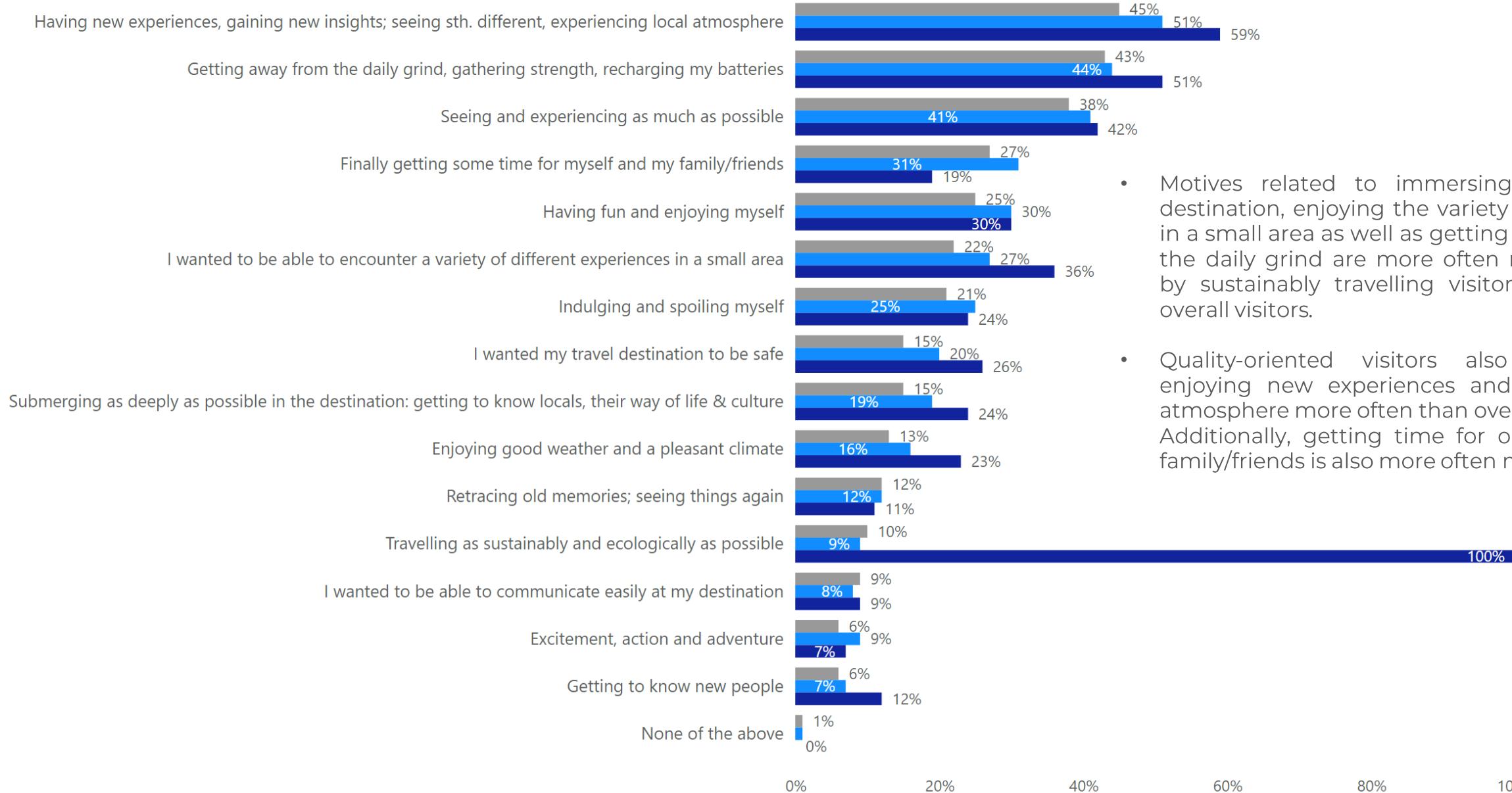


- Luxembourg being close and easy to reach is the most often cited reason for sustainable travellers. Quality-oriented travellers indicated curiosity to discover a new country most frequently as a key reason.
- Free public transport is named more often by sustainable travellers whereas for quality-oriented visitors the image and reputation of Luxembourg seems to be a more important driver, compared to overall visitors.

# Travel motives

## Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

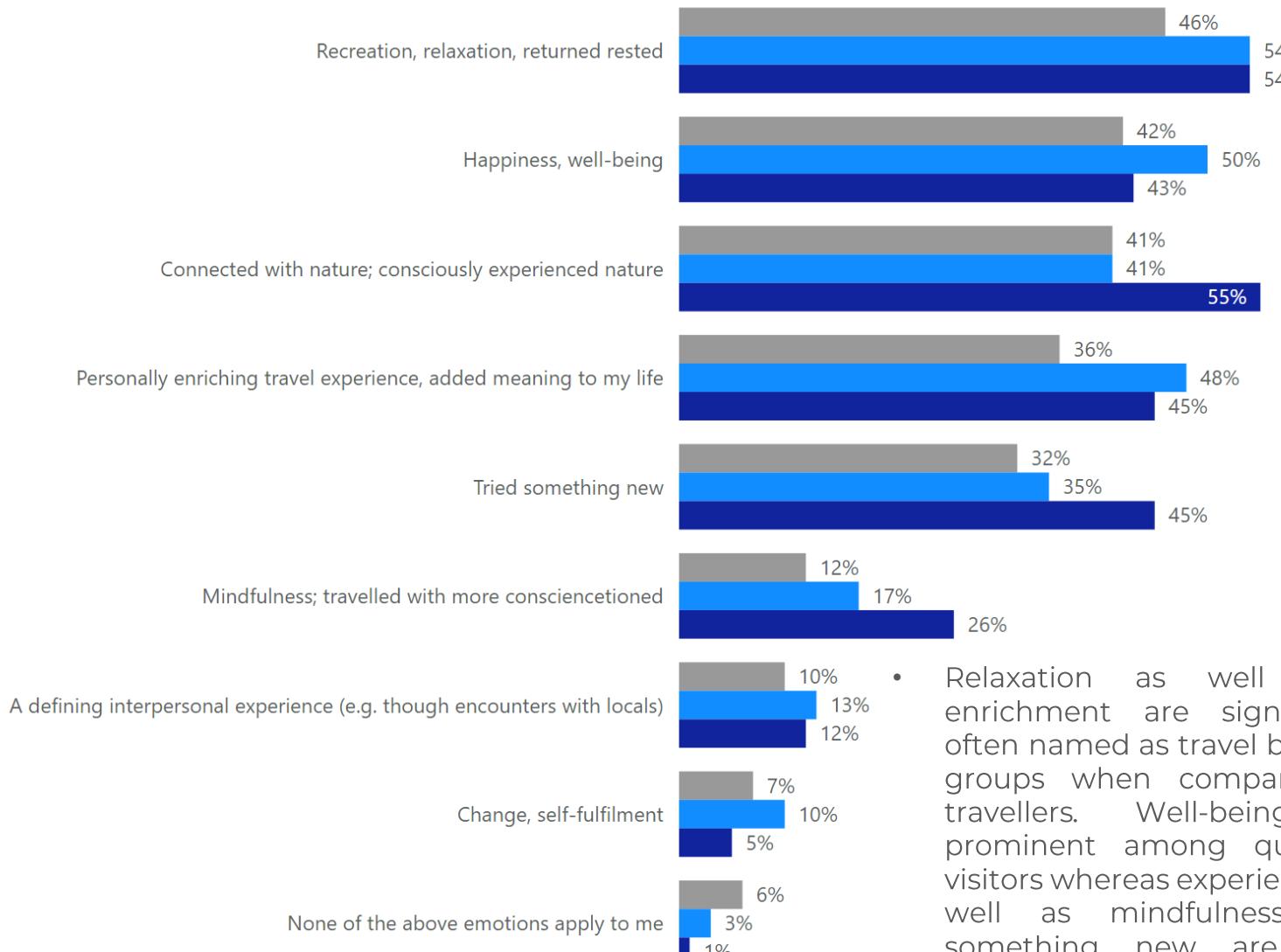


- Motives related to immersing into the destination, enjoying the variety of its offer in a small area as well as getting away from the daily grind are more often mentioned by sustainably travelling visitors than by overall visitors.
- Quality-oriented visitors also mention enjoying new experiences and the local atmosphere more often than overall visitors. Additionally, getting time for oneself and family/friends is also more often mentioned.

## Emotional benefits experienced during stay

### Visitors with overnight

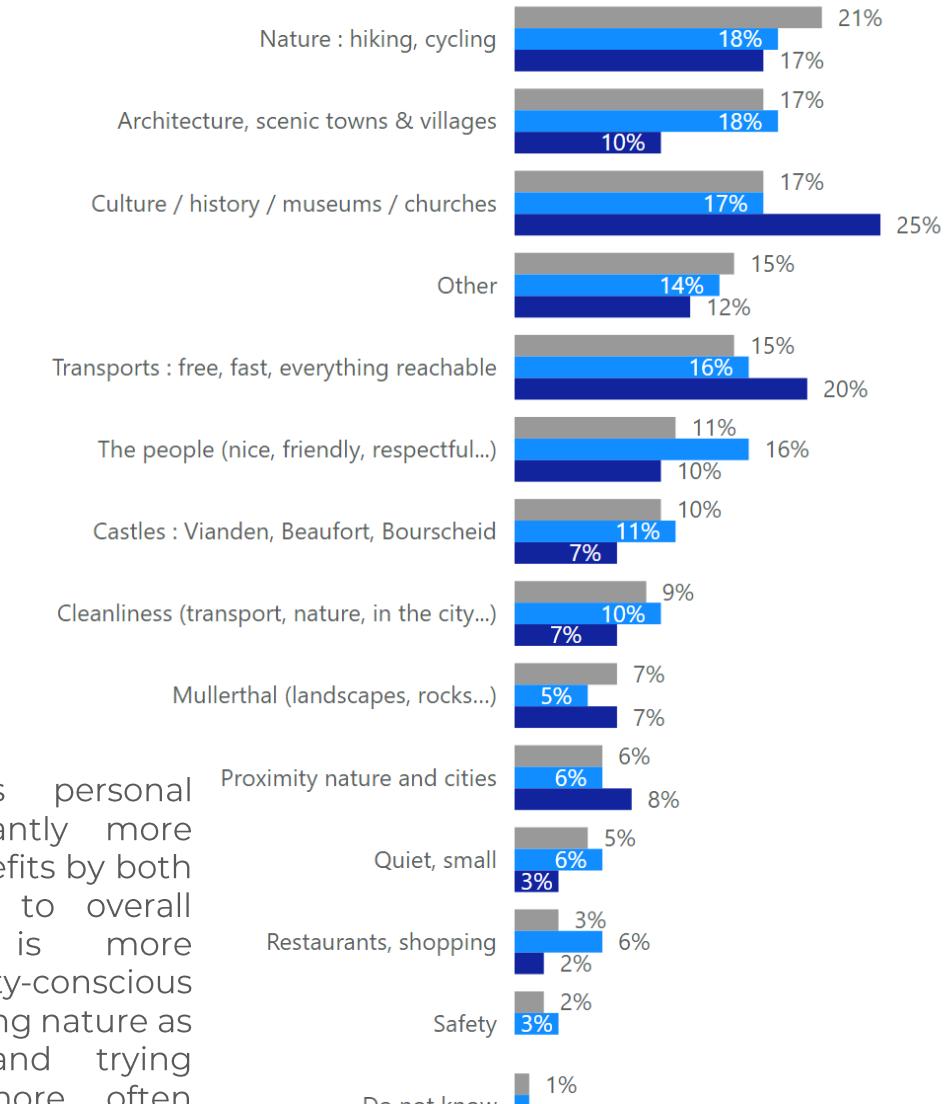
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Particularly positive experience during stay (open question)

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

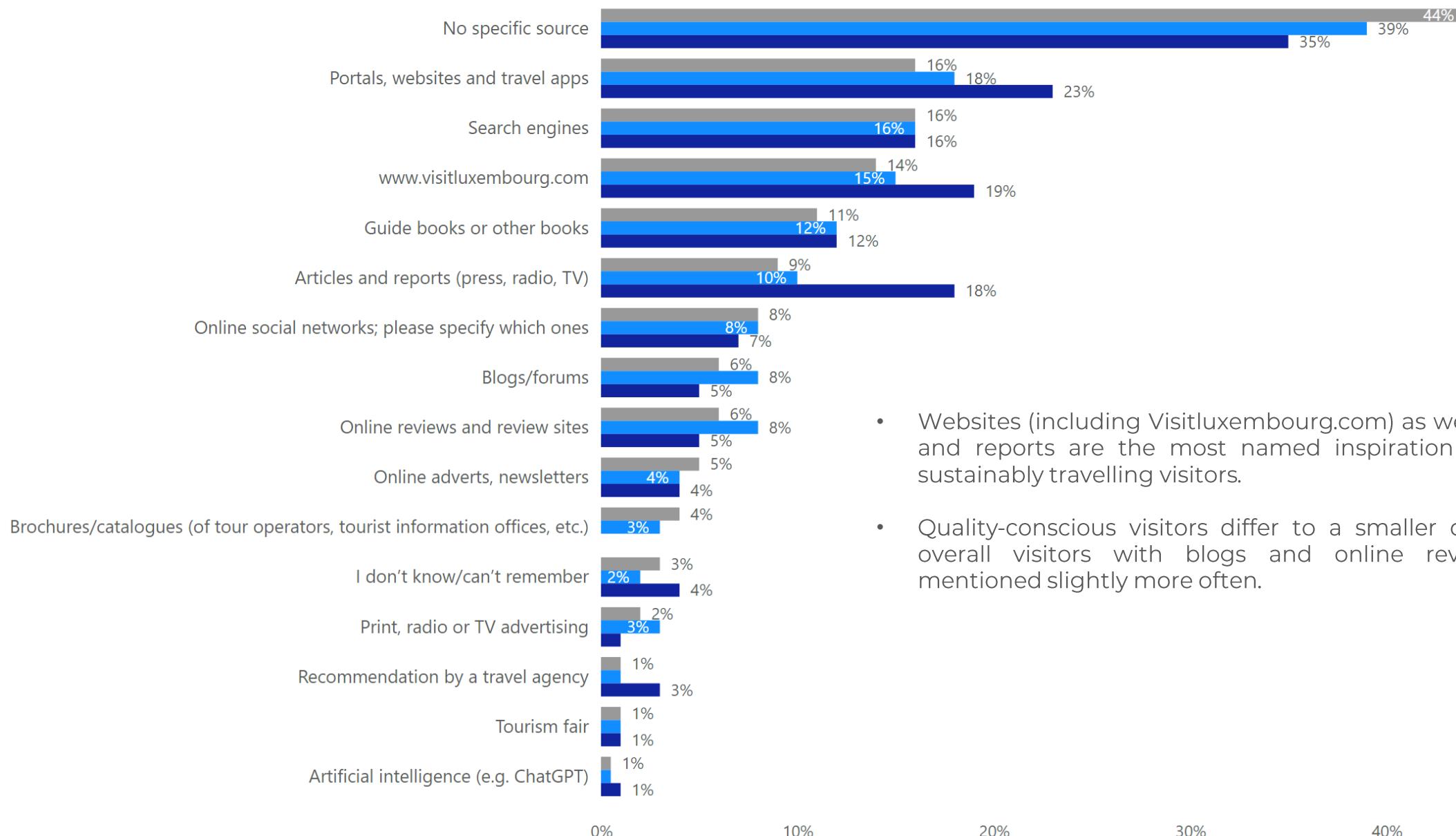


• Relaxation as well as personal enrichment are significantly more often named as travel benefits by both groups when compared to overall travellers. Well-being is more prominent among quality-conscious visitors whereas experiencing nature as well as mindfulness and trying something new are more often indicated by sustainable travellers.

## Inspiration sources

### Visitors with overnight

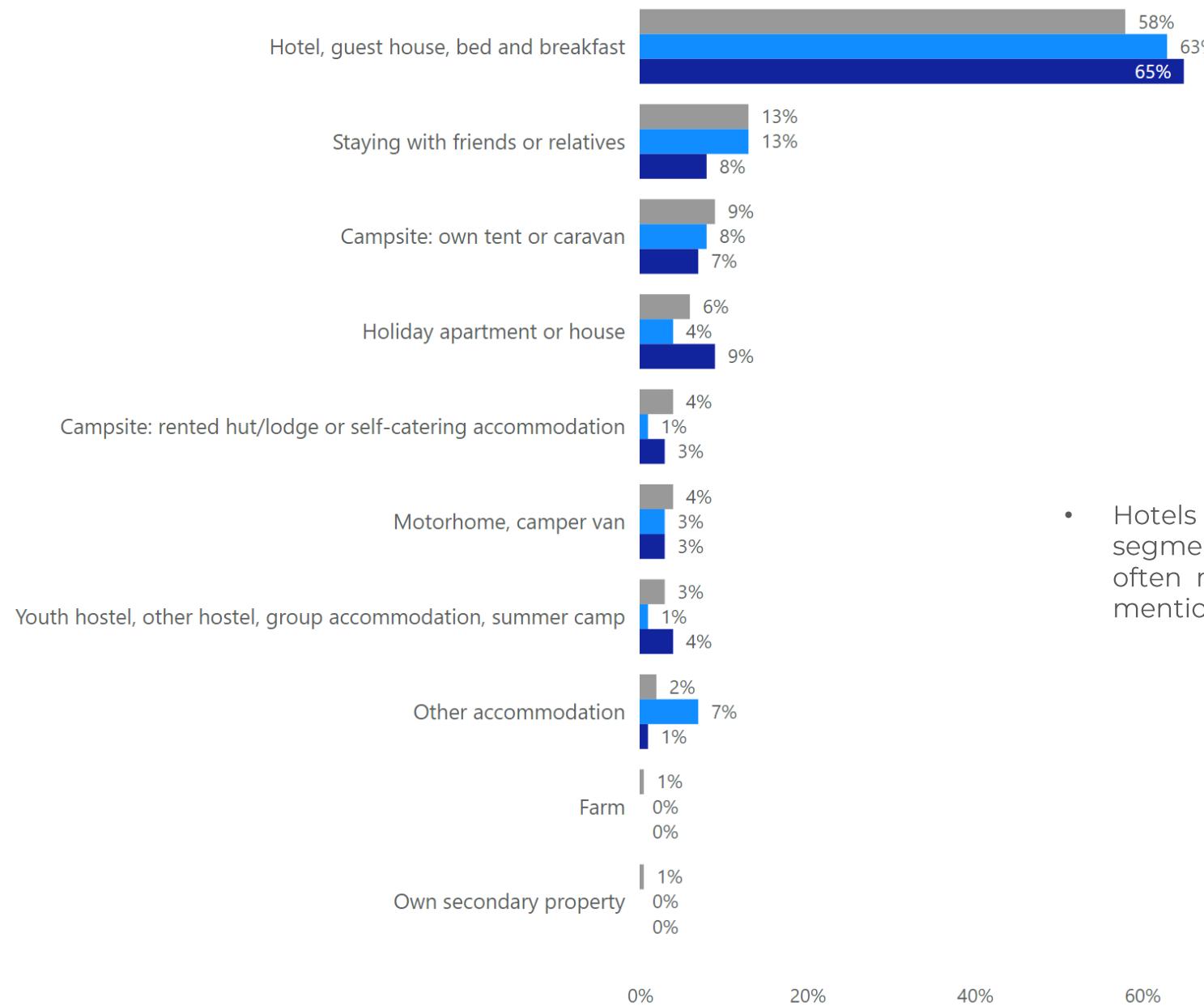
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



- Websites (including Visitluxembourg.com) as well as articles and reports are the most named inspiration sources for sustainably travelling visitors.
- Quality-conscious visitors differ to a smaller degree from overall visitors with blogs and online reviews being mentioned slightly more often.

## Type of accommodation

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

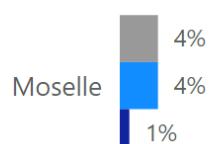
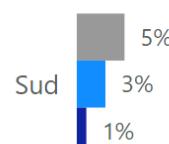
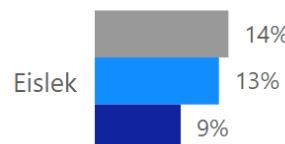
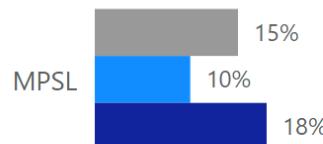


- Hotels are the most used type of accommodation for both segments. Holiday apartments or houses are slightly more often mentioned by sustainable visitors. Additionally, they mention staying with friends a bit less often.

## Destination region

### Visitors with overnight

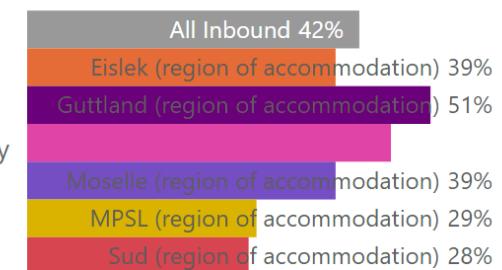
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



0% 20% 40% 60%

## Shares by destination region

### Visitors with overnight



High level of quality



Travelling as sustainably and ecologically as possible

- For both groups, Luxembourg City is the most prominent destination region. Mullerthal is more and Eislek less popular among sustainably travelling visitors when compared to all inbound visitors. Quality-oriented visitors visit the Mullerthal less.
- Gutland and Luxembourg City hold the highest shares of quality-oriented visitors and Mullerthal indicates the highest share of sustainably travelling visitors.

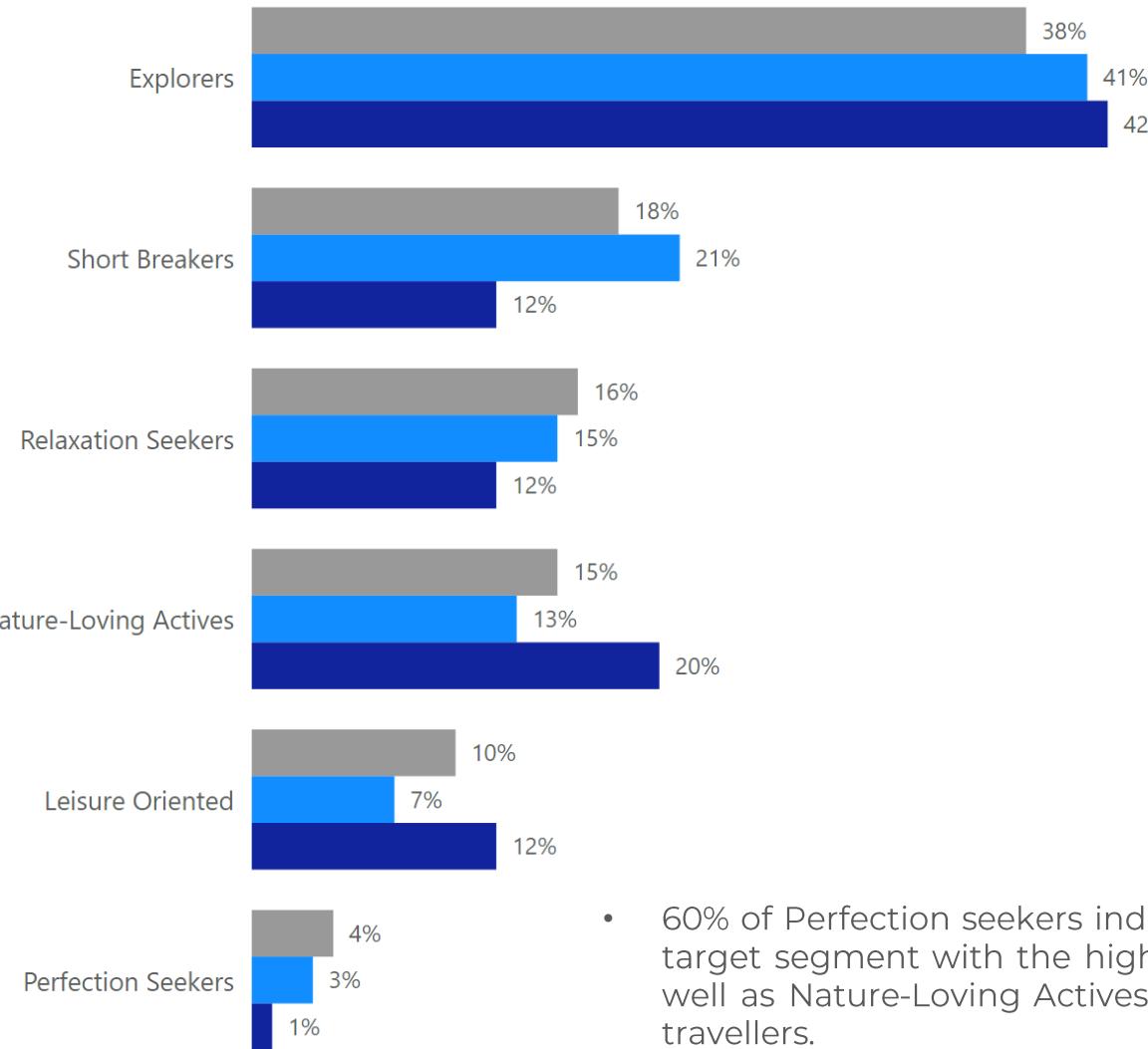
0% 20% 40%

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

## Target segments

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

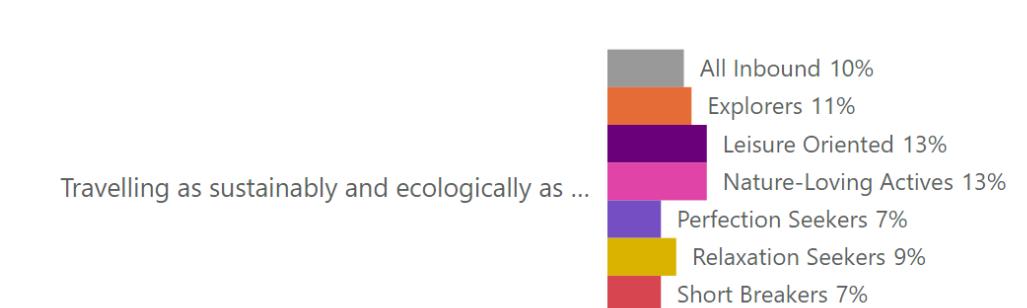


## Shares by target segments

### Visitors with overnight



High level of quality



Travelling as sustainably and ecologically as ...

- 60% of Perfection seekers indicate a quality-orientation, making it the target segment with the highest share. Leisure Oriented travellers as well as Nature-Loving Actives show the highest shares of sustainable travellers.

0% 10% 20% 30% 40%

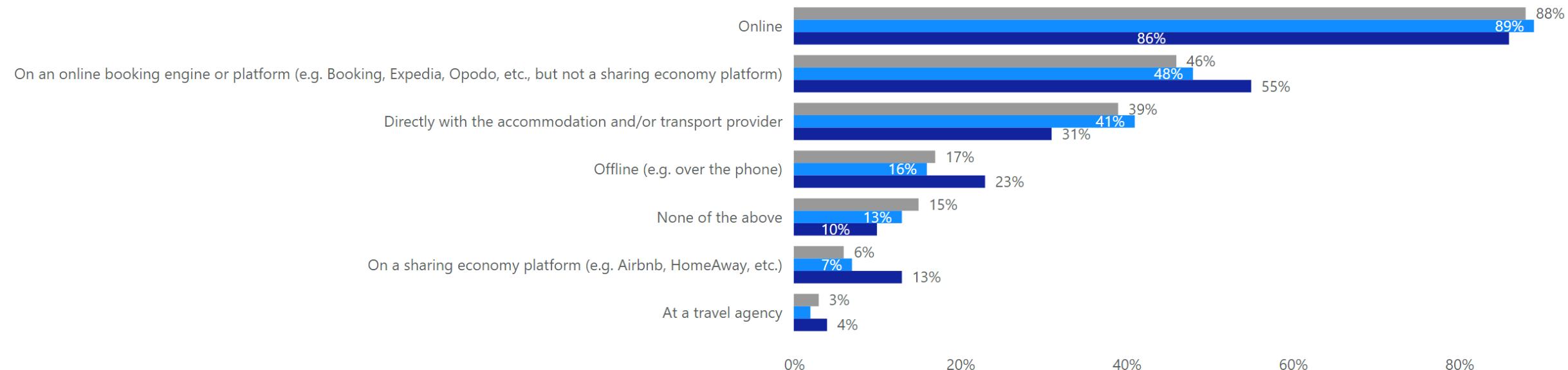
0% 50%

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

## Booking channels

### Visitors with overnight

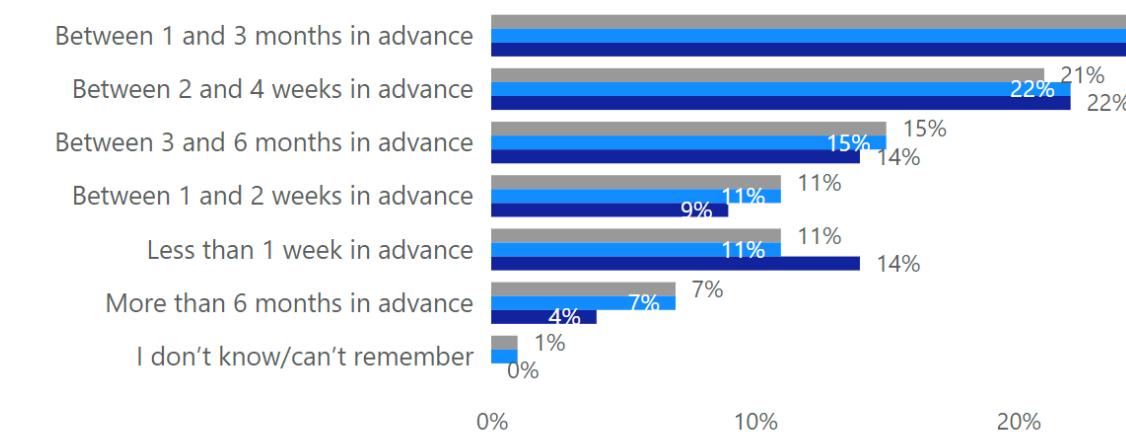
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Decision moment

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

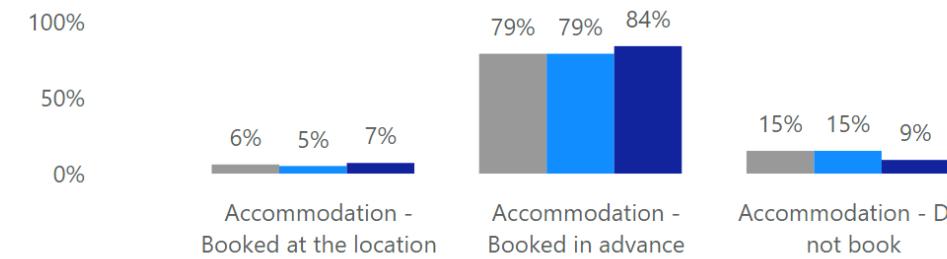


- Booking online is most popular for both groups. Booking and sharing economy platforms as well as offline booking are more popular for sustainable visitors. Quality-conscious visitors are very similar to overall visitors in regard to their booking channels.
- Both groups show no major differences in their decision moment when compared to all inbound visitors.

## Booking of travel items

### Accommodation

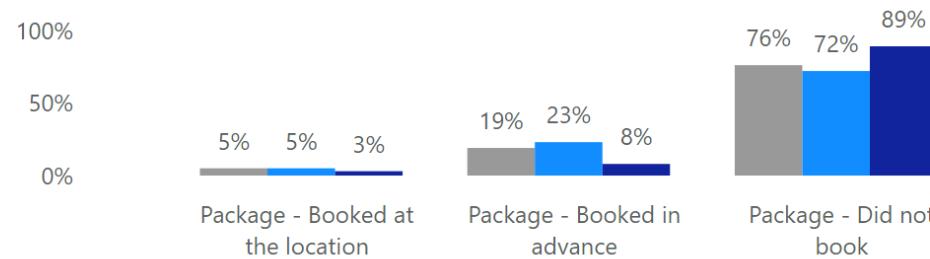
Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Booking of travel items

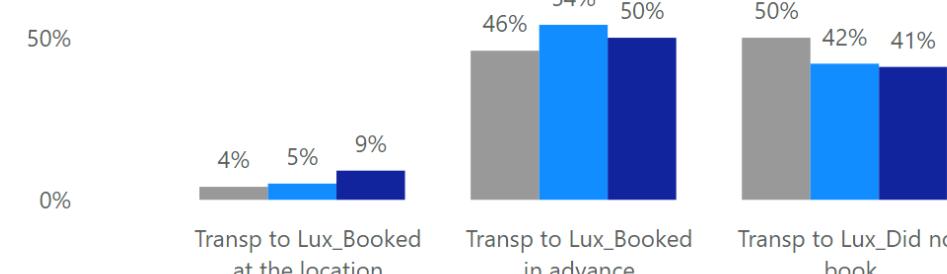
### Package

Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)



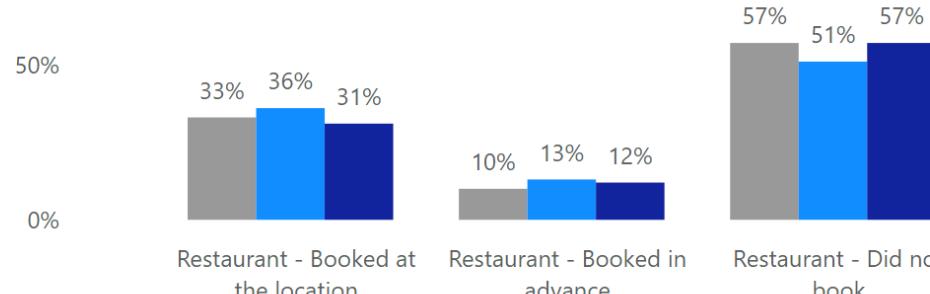
### Transport to Luxembourg

Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)



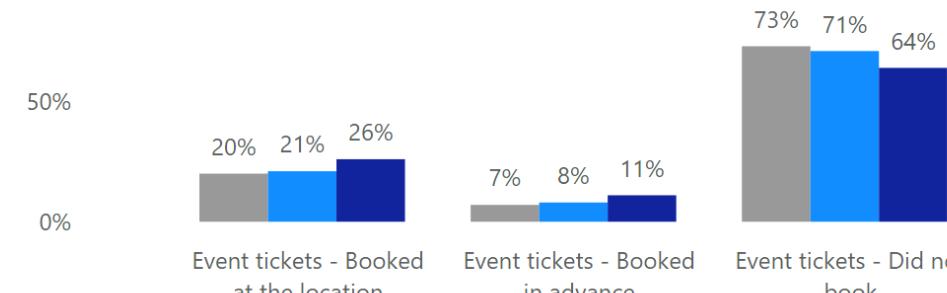
### Restaurant

Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)



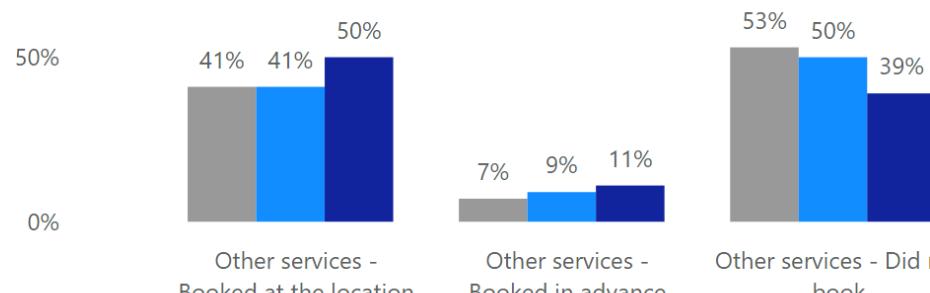
### Event tickets

Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)



### Other services

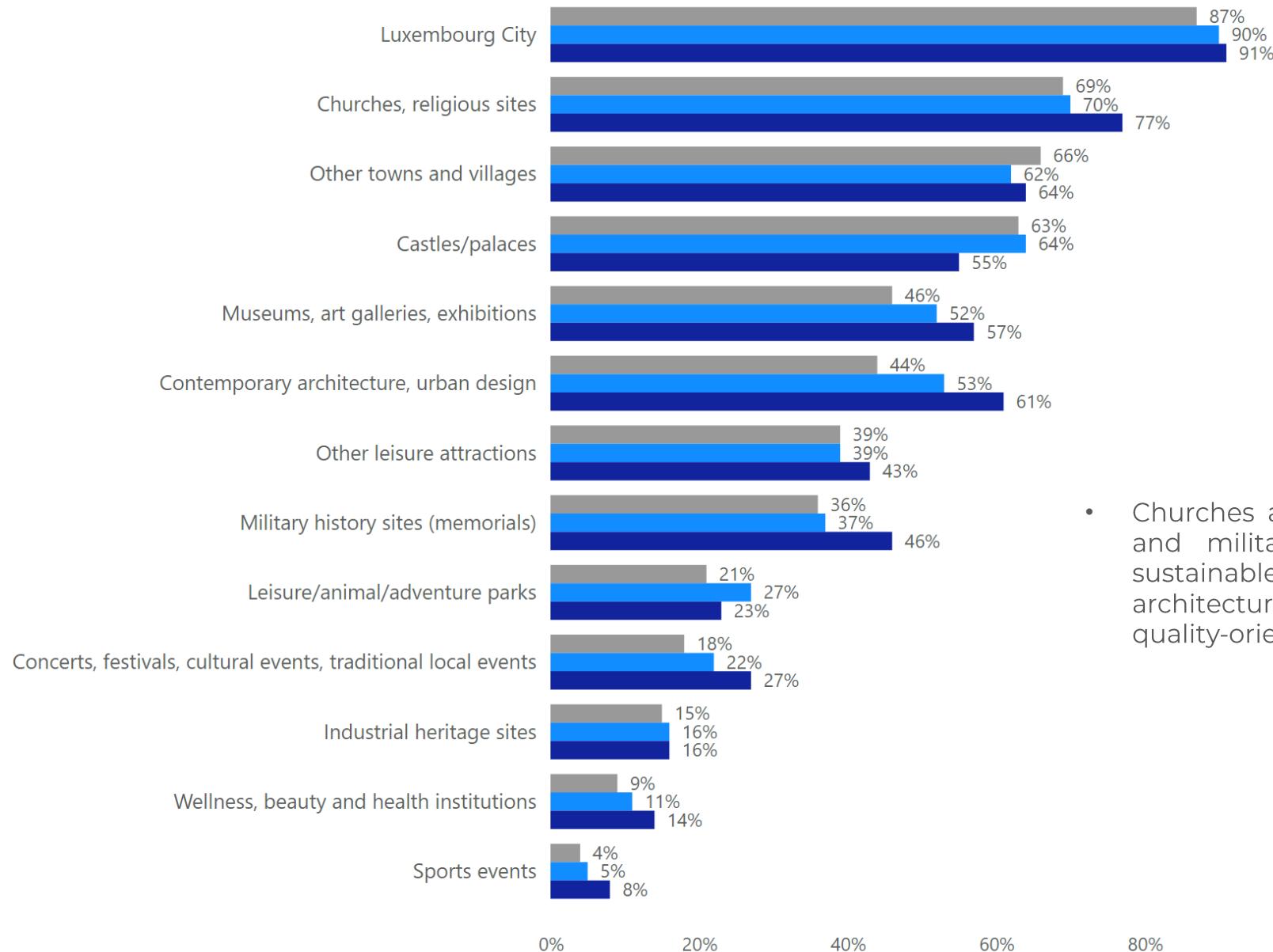
Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)



# Places visited

## Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)



- Churches as well as museums, contemporary architecture and military history sites are more often visited by sustainable travellers. Museums and contemporary architecture are also more often than average visited by quality-oriented travellers.

## Non-sporting activities

### Visitors with overnight

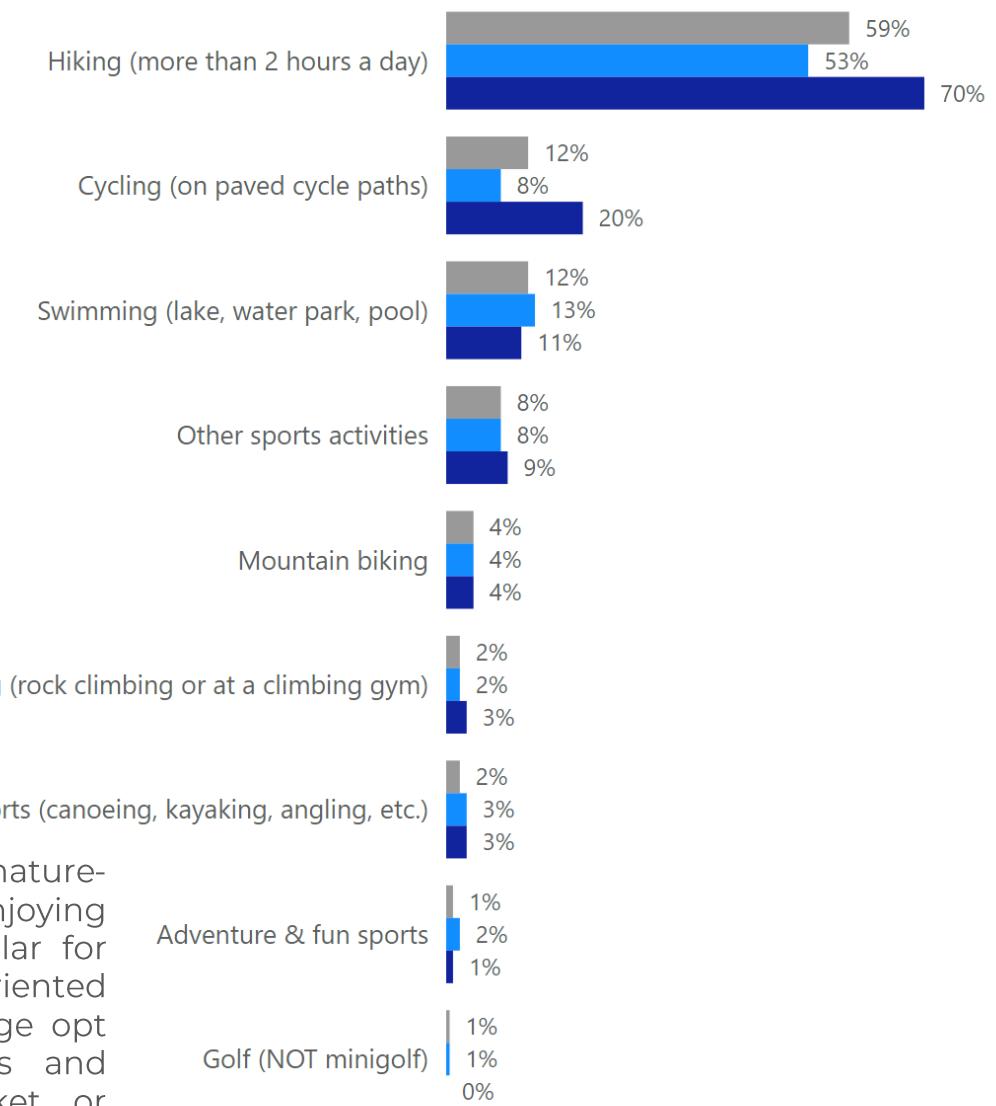
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Sporting activities

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

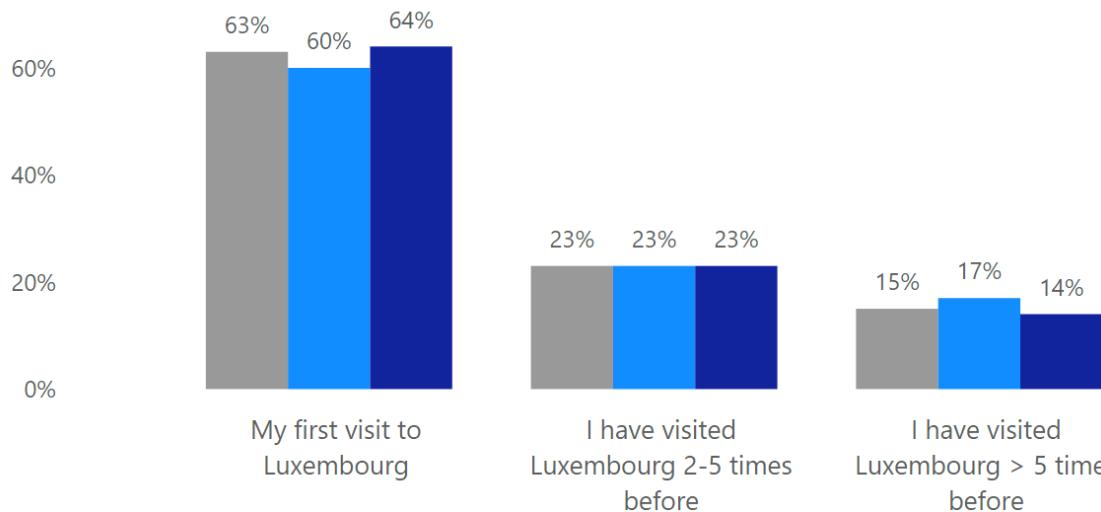


- Hiking, cycling and other nature-related activities as well as enjoying urban lifestyle are more popular for sustainable travellers. Quality-oriented visitors more often than average opt for trying regional specialties and buying directly at the market or producers.

## Frequency of visit

### Visitors with overnight

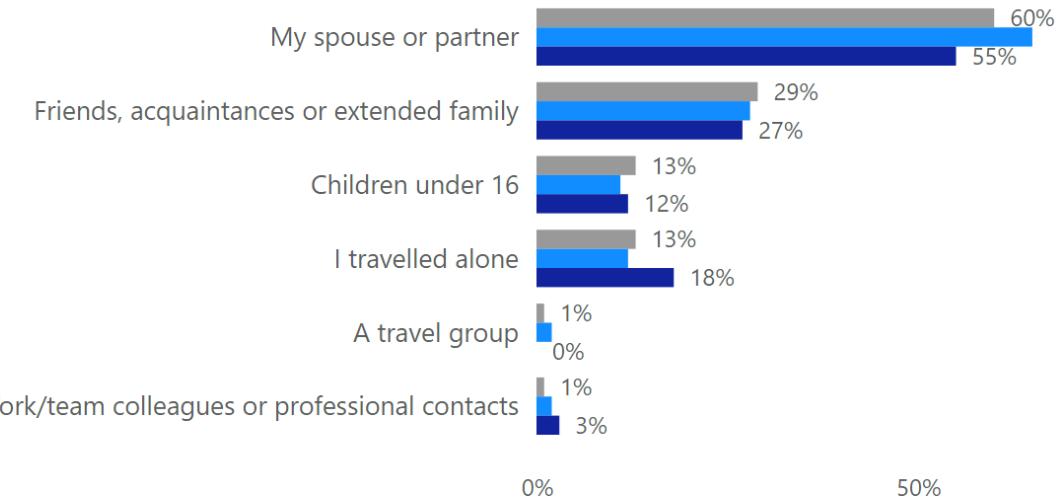
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Travel party

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## First-time visitors

### Visitors with overnight

**60%**

Quality-conscious

**64%**

Sustainable travel (motive)

**63%**

All Inbound

- Both groups do not differ significantly from overall visitors regarding the frequency of visit.
- Quality-conscious visitors travel a bit more often with their spouse or partner while sustainable travellers tend to travel alone a bit more frequently.
- Sustainable travellers show a slightly higher share of visitors having spent nights in Luxembourg and abroad during the same trip when compared to overall visitors.

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

### Visitors with overnight

**41%**

Quality-conscious

**43%**

Sustainable travel (motive)

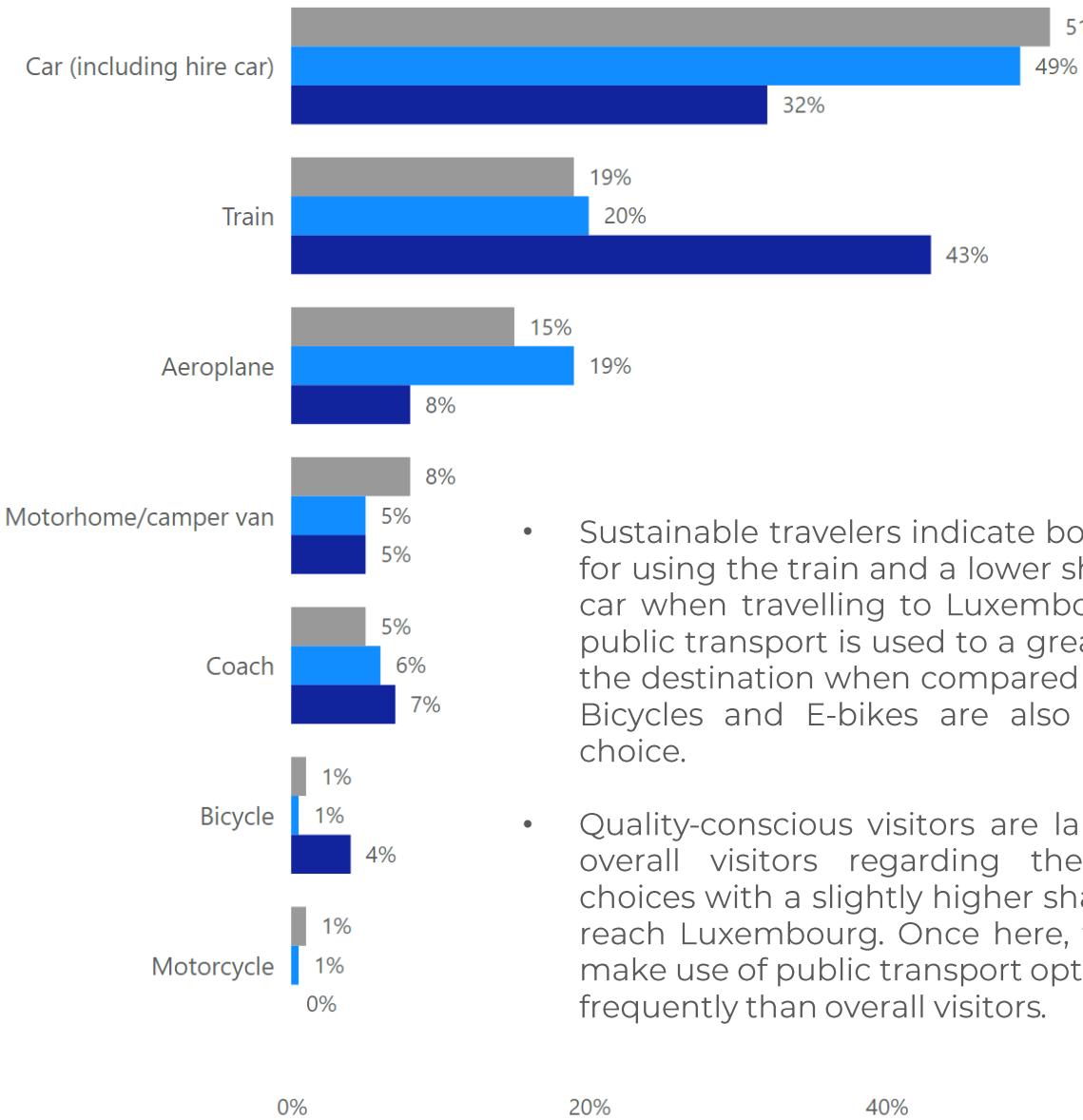
**39%**

All Inbound

## Transport to destination

### Visitors with overnight

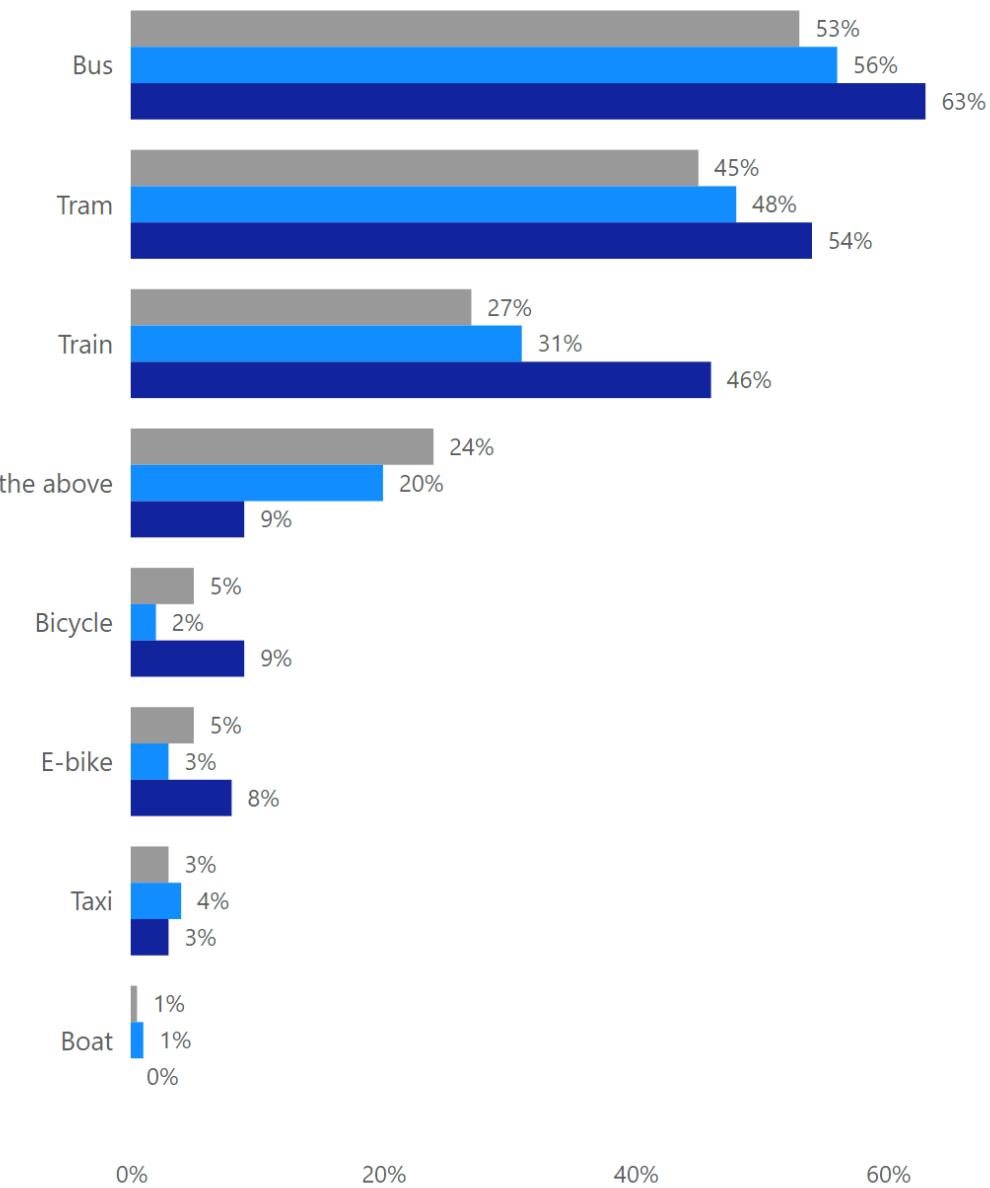
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Transport in destination

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

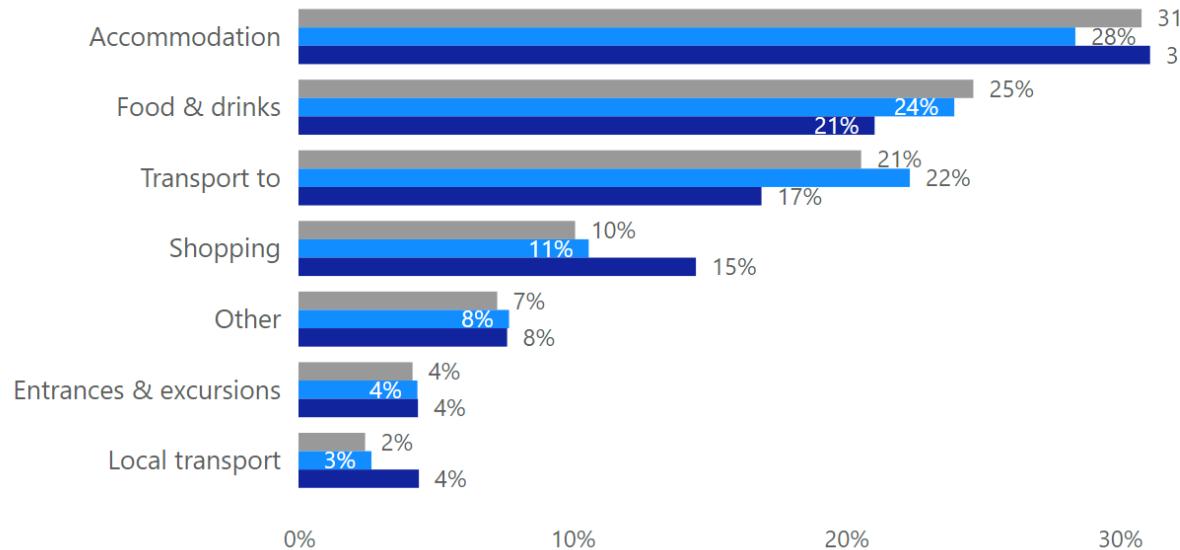


- Sustainable travelers indicate both a higher share for using the train and a lower share for using the car when travelling to Luxembourg. Additionally, public transport is used to a greater extent within the destination when compared to overall visitors. Bicycles and E-bikes are also a more popular choice.
- Quality-conscious visitors are largely in line with overall visitors regarding their transportation choices with a slightly higher share of air travel to reach Luxembourg. Once here, they also tend to make use of public transport options slightly more frequently than overall visitors.

## Spending categories

### Visitors with overnight

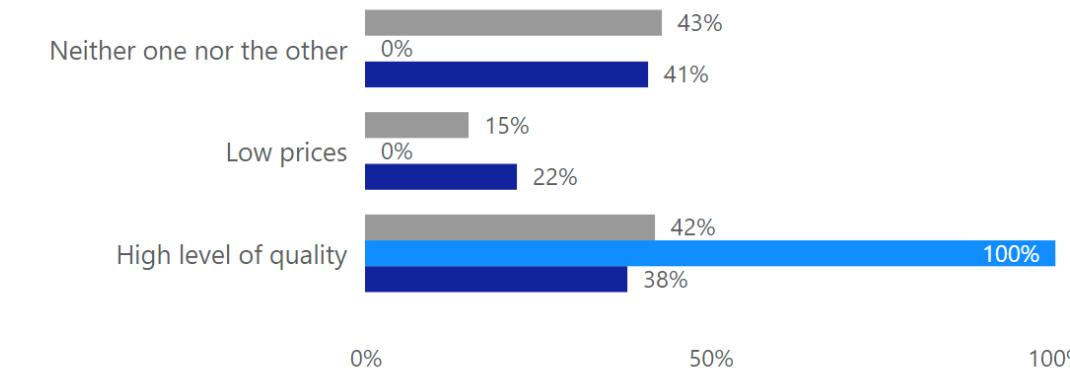
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Quality vs. price orientation

### Visitors with overnight

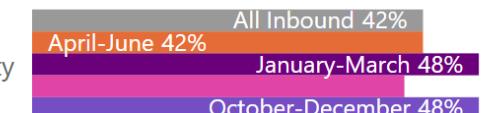
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



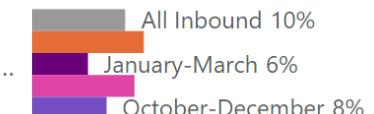
## Shares by arrival months

### Visitors with overnight

High level of quality



Travelling as sustainably and ecologically as ...



- Both, sustainable and quality-oriented travellers show higher spendings per person/night compared to overall visitors. The length of stay does not differ significantly.

### Spend/pers./trip

#### Visitors with overnight

**785 €**

Quality-conscious

### Spend/pers./night

#### Visitors with overnight

**205 €**

Quality-conscious

### Length of stay (nights)

#### Visitors with overnight

**3,8**

Quality-conscious

**675 €**

Sustainable travel (motive)

**175 €**

Sustainable travel (motive)

**3,9**

Sustainable travel (motive)

**619 €**

All Inbound

**160 €**

All Inbound

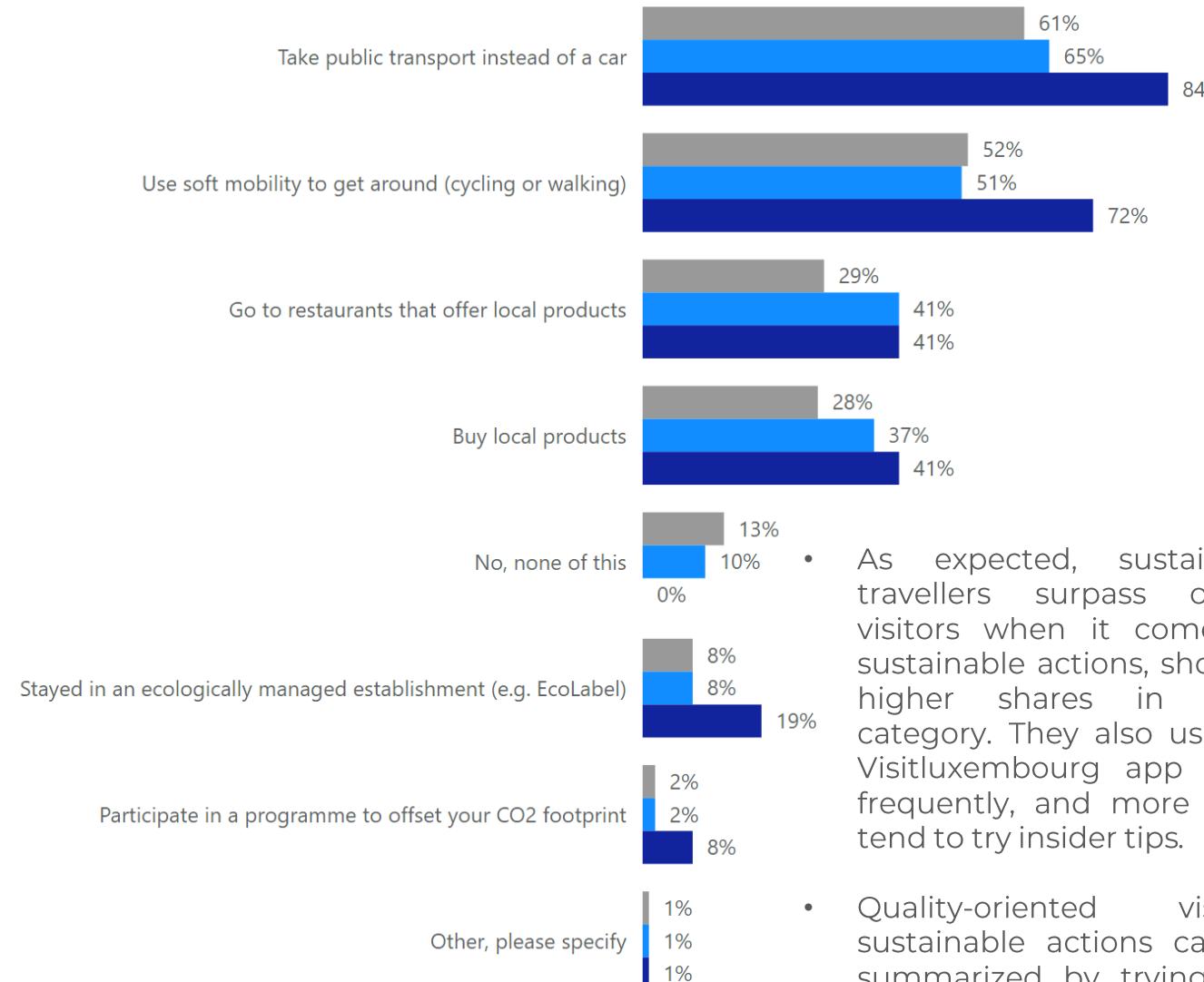
**3,9**

All Inbound

## Sustainable actions during stay

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)



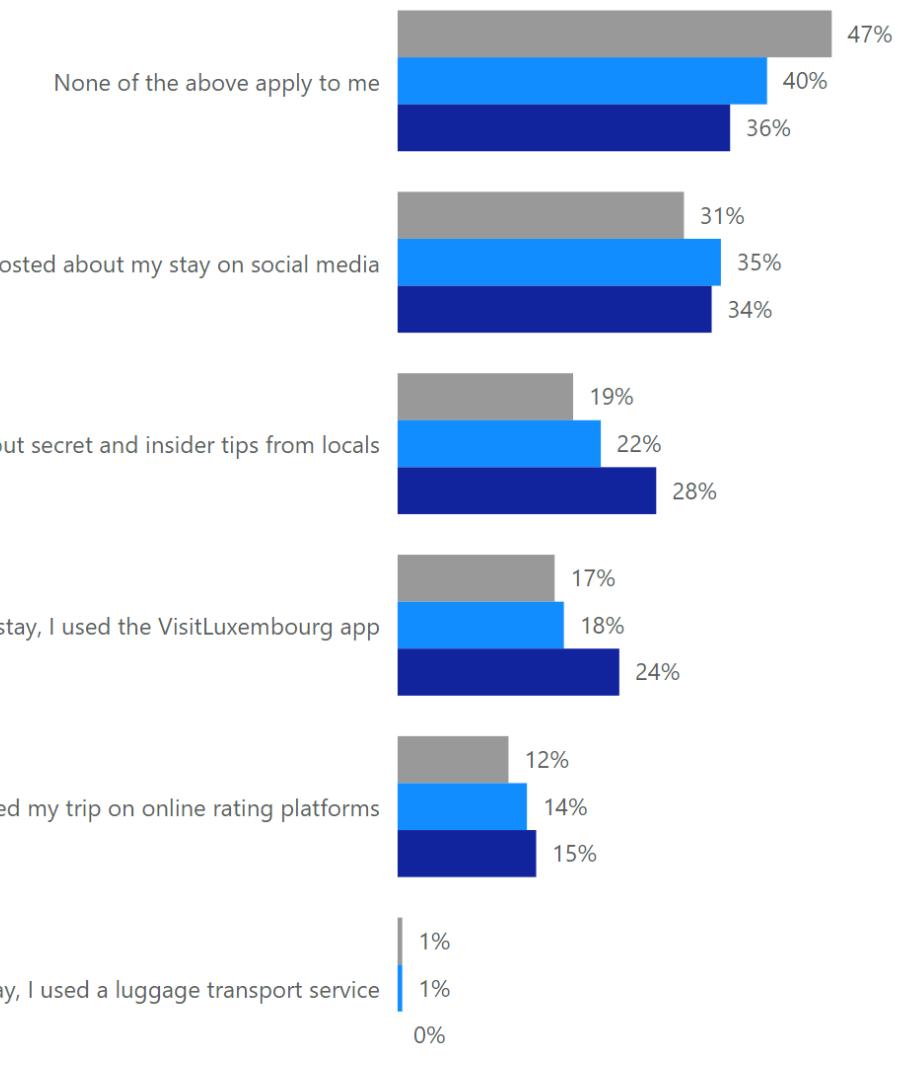
- As expected, sustainable travellers surpass overall visitors when it comes to sustainable actions, showing higher shares in every category. They also use the Visitluxembourg app more frequently, and more often tend to try insider tips.

- Quality-oriented visitors' sustainable actions can be summarized by trying and purchasing local products.

## Services used during stay

### Visitors with overnight

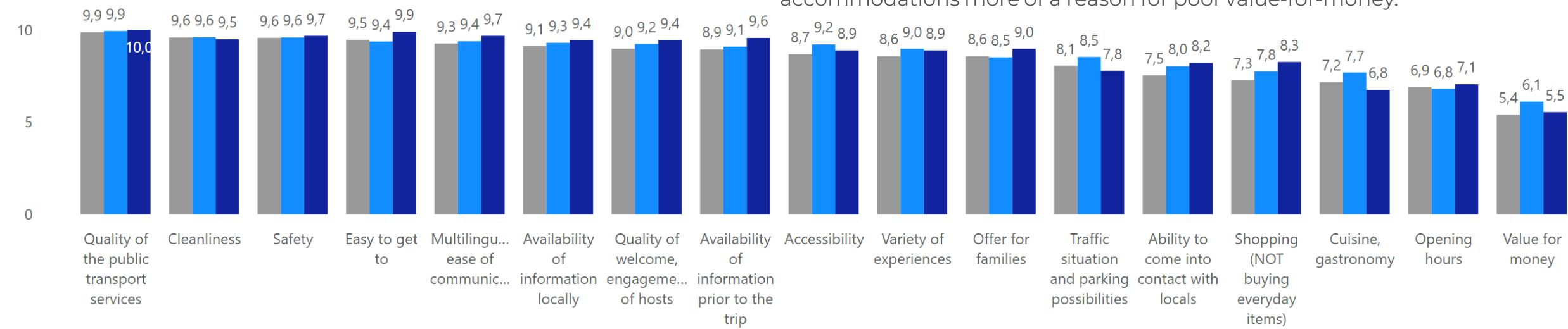
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Satisfaction items

### Visitors with overnight

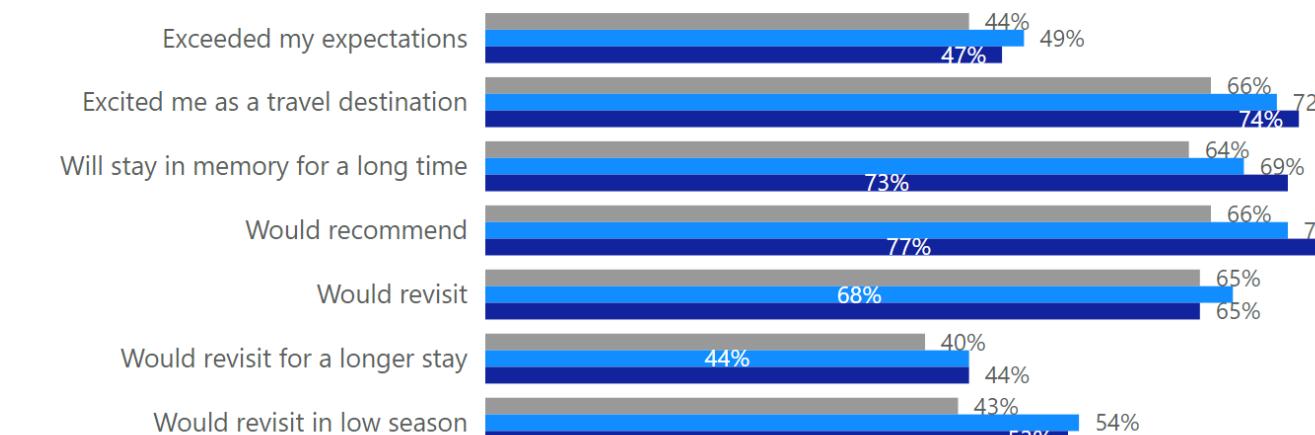
Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)



### Overall satisfaction - % "strongly agree"

### Visitors with overnight

Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)

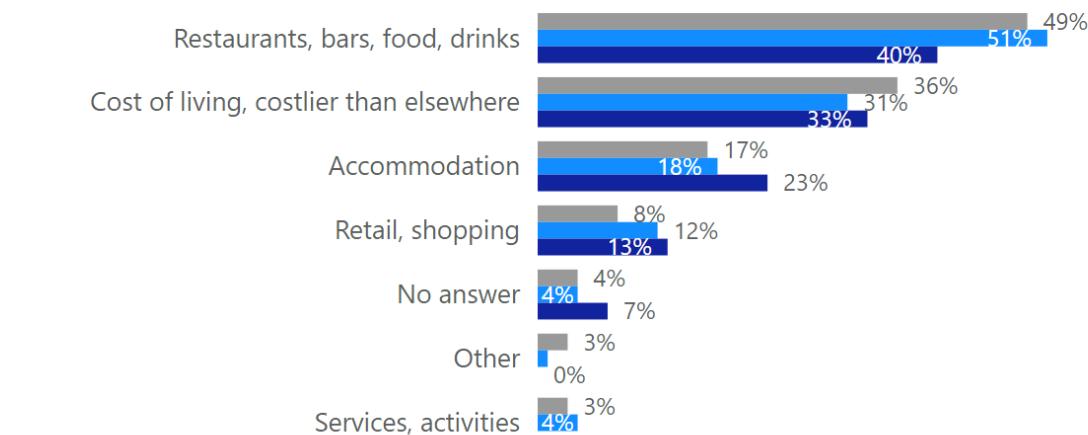


- Generally, the satisfaction of quality-oriented and sustainable travellers is higher or equal compared to overall visitors, with only a few categories showing lower scores for both groups. For sustainable travellers, restaurants are less and accommodations more of a reason for poor value-for-money.

### Reasons for poor value-for-money

#### Visitors with overnight

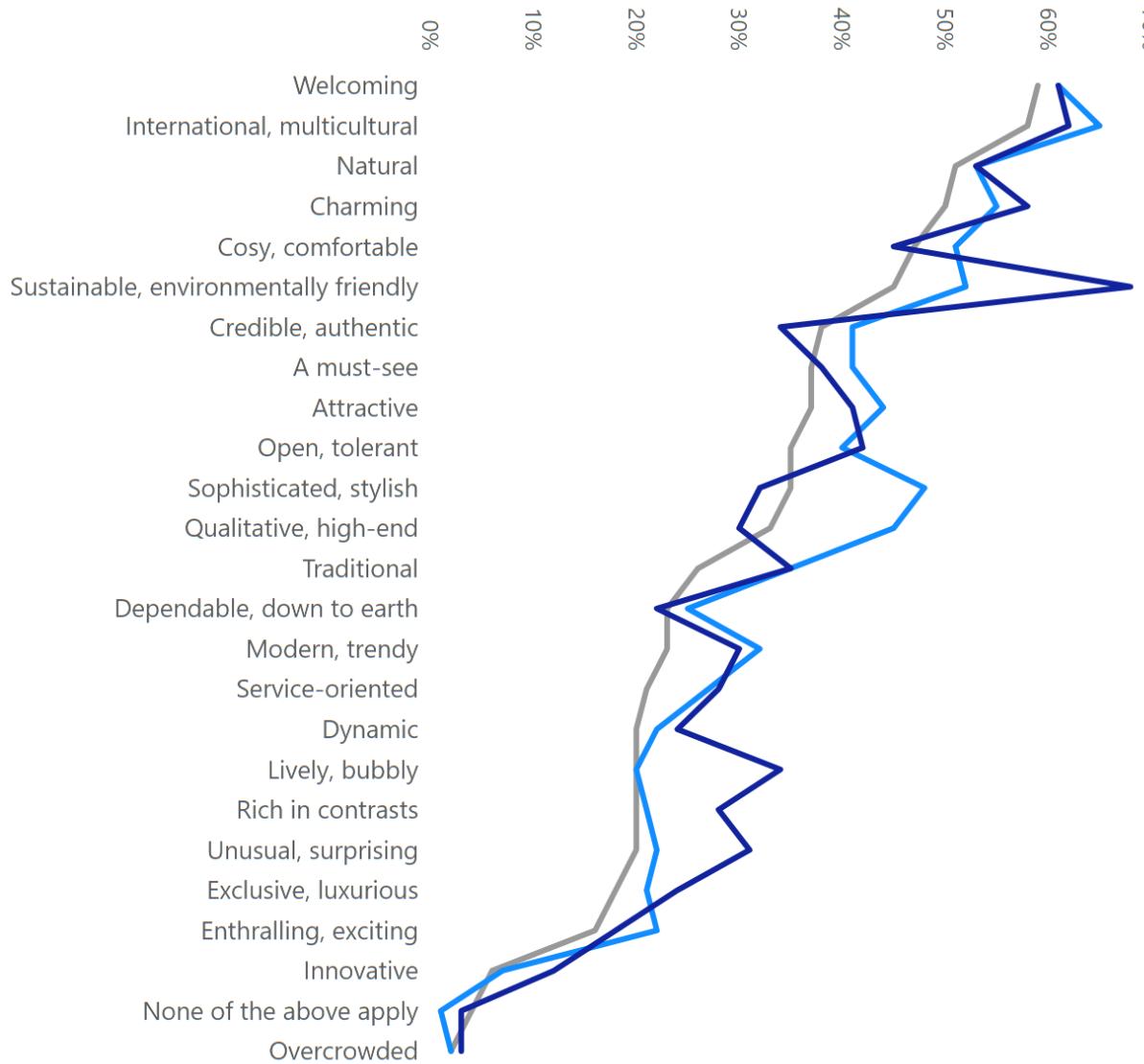
Attribut ● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Brand features

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

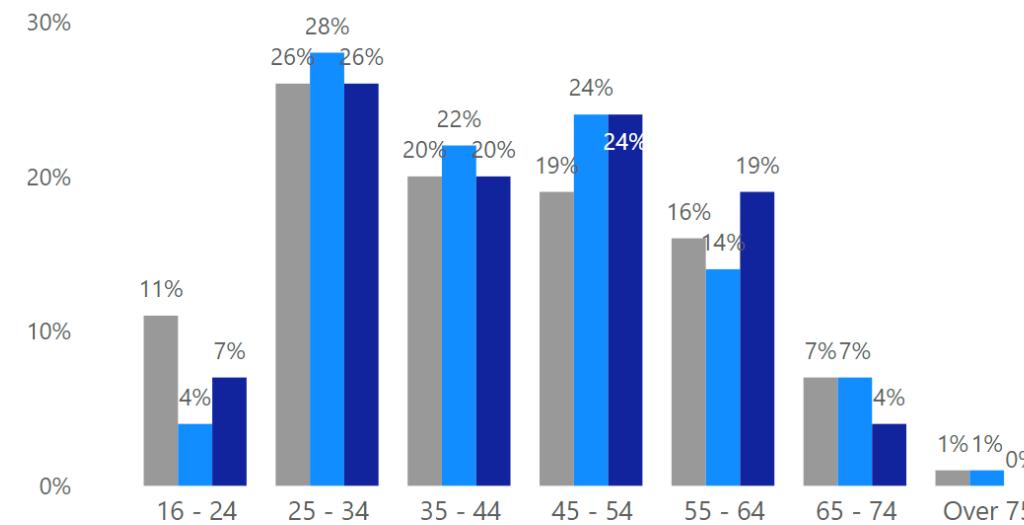


- Both groups agree more with the brand features than all inbound visitors for most of the features.
- Sustainable travellers show an exceptionally higher value for the sustainability brand feature as well as higher shares for lively, rich in contrasts and surprising. A lower share can be seen for credible, stylish and qualitative.
- Quality-oriented travellers however agree especially more with stylish and qualitative as brand features.

## Age

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)

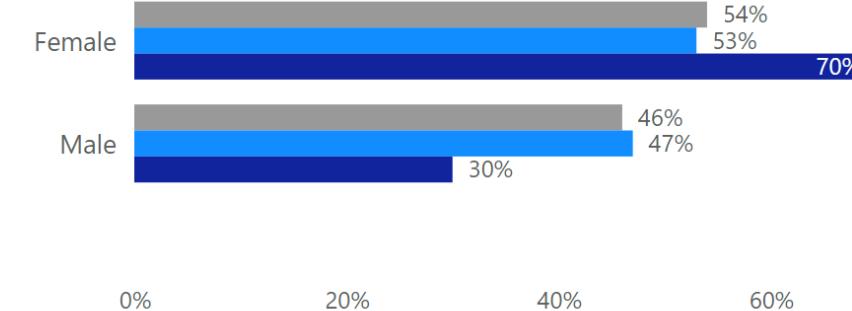


- Both groups show lower shares of visitors aged 16-24. Sustainable travellers are more often aged 55-64 and substantially more often female.

## Gender

### Visitors with overnight

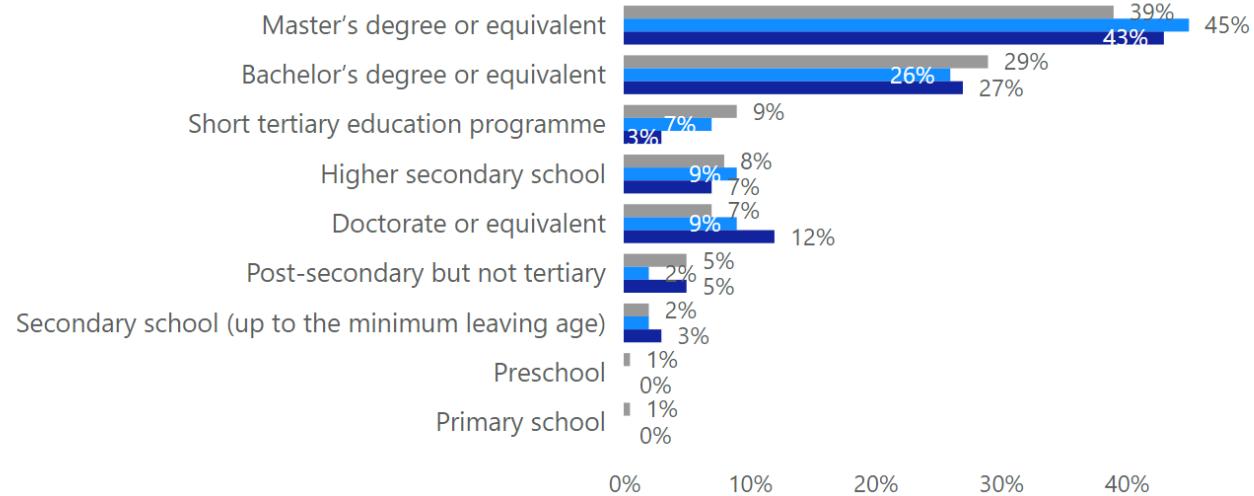
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Education

### Visitors with overnight

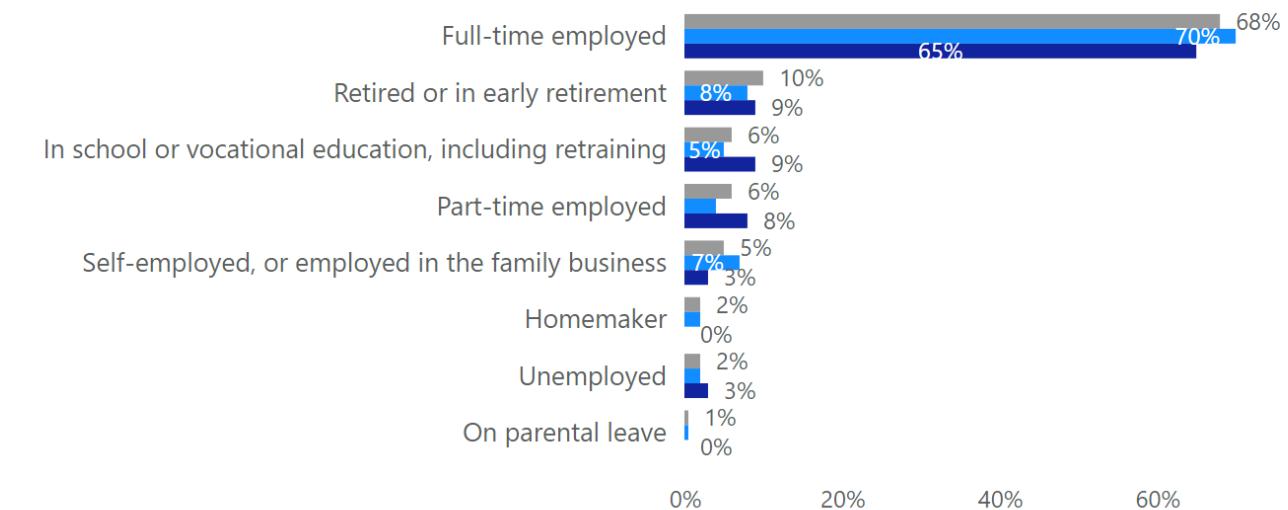
● All Inbound ● Quality-conscious ● Sustainable travel (motive)



## Employment

### Visitors with overnight

● All Inbound ● Quality-conscious ● Sustainable travel (motive)





# **Destination Awareness & Growth Potential for quality-oriented and sustainable travellers segments**

# Share of quality-oriented travellers

## By source markets & by LFT target segments



- Austria
- Belgium
- France
- Germany
- Italy
- Netherlands
- Spain
- Switzerland
- Total
- United Kingdom

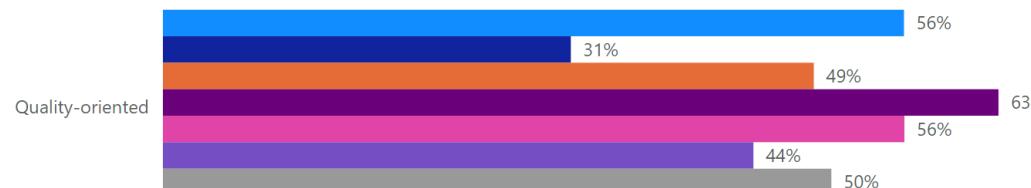
Average Europe

50%



- Explorers
- Leisure Oriented
- Nature-Loving Actives
- Perfection Seekers
- Relaxation Seekers
- Short Breakers
- Total

- Switzerland indicates the highest share of quality-oriented travellers while Italy and the UK indicate the lowest.
- Quality-orientation is especially prominent among Perfection Seekers followed by Explorers and Relaxation Seekers.



# General theme interest – Sustainable travel



	Rank (*)	Number of themes surveyed	% „very interested“ in theme	% „interested“ in theme	% „interested“, Ø all themes	„Interested“ in theme, pop., mn (**)
Average Europe	15	33	-	<b>56%</b>	54%	-
	16	33	24%	<b>53%</b>	52%	<b>31,7</b>
	18	33	21%	<b>50%</b>	53%	<b>6,3</b>
	18	33	22%	<b>55%</b>	54%	<b>3,6</b>
	16	33	23%	<b>55%</b>	53%	<b>3,6</b>
	16	33	18%	<b>54%</b>	51%	<b>4,4</b>
	14	33	24%	<b>61%</b>	55%	<b>28,6</b>
	14	33	24%	<b>56%</b>	53%	<b>26,9</b>
	17	38	29%	<b>63%</b>	57%	<b>26,9</b>
	18	38	23%	<b>60%</b>	57%	<b>20,8</b>
	10	21	-	<b>51%</b>	47%	<b>14,3</b>
	6	24	35%	<b>65%</b>	54%	<b>2,3</b>
	12	24	22%	<b>51%</b>	51%	<b>2,1</b>
	5	24	24%	<b>63%</b>	52%	<b>4,5</b>
	8	24	47%	<b>72%</b>	60%	<b>5,4</b>

- General interest for sustainable travel is relatively high in France, Italy, Ireland and Portugal. On a list of >30 travel themes, it rather ranks in the middle in terms of general interest by Europeans in a travel context.

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 – Sustainable travel



	Rank (*)	Number of themes surveyed	% „Luxembourg very suitable“	% „Lux. very suitable“, Ø all themes	„Luxembourg very suitable“, pop., 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
	18	31	21%	23%	9,0
	18	31	22%	26%	7,6
	13	20	23%	27%	0,8
	14	20	20%	24%	0,8
	13	20	18%	21%	1,3
	10	20	33%	33%	2,5

- Respondents from Southern European markets tend to give better ratings for Luxembourg in terms of sustainability perception, while the Swiss and British, in particular, judge Luxembourg comparatively less suitable for this topic as a destination than respondents from most other source markets.

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

## Sustainable travel



(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	11	26	16	26
NLA	8	26	20	26
RS	11	26	17	26
SB	11	26	18	26
PS	12	26	14	26
LO	11	26	17	26

- Similar to what is observed at source market level, general interest in sustainable travel is ranked higher than Luxembourg's theme competence for the topic. Nature-Loving Actives are most interested, whilst Perfection Seekers rank Luxembourg best for its perceived theme competence.

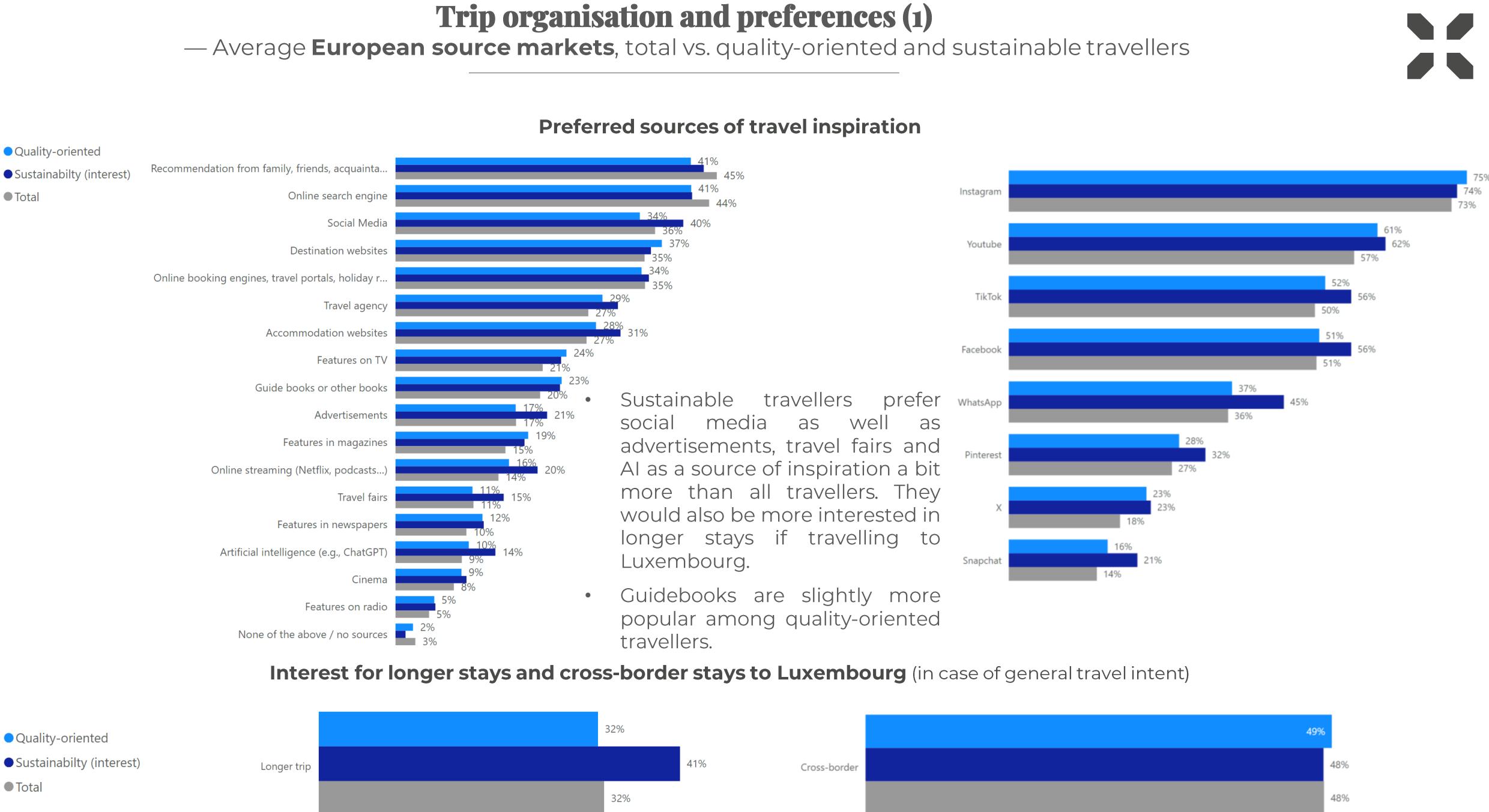


# **Trip organisation and preferences of quality-oriented and sustainable travellers segments**



# Trip organisation and preferences (1)

— Average European source markets, total vs. quality-oriented and sustainable travellers

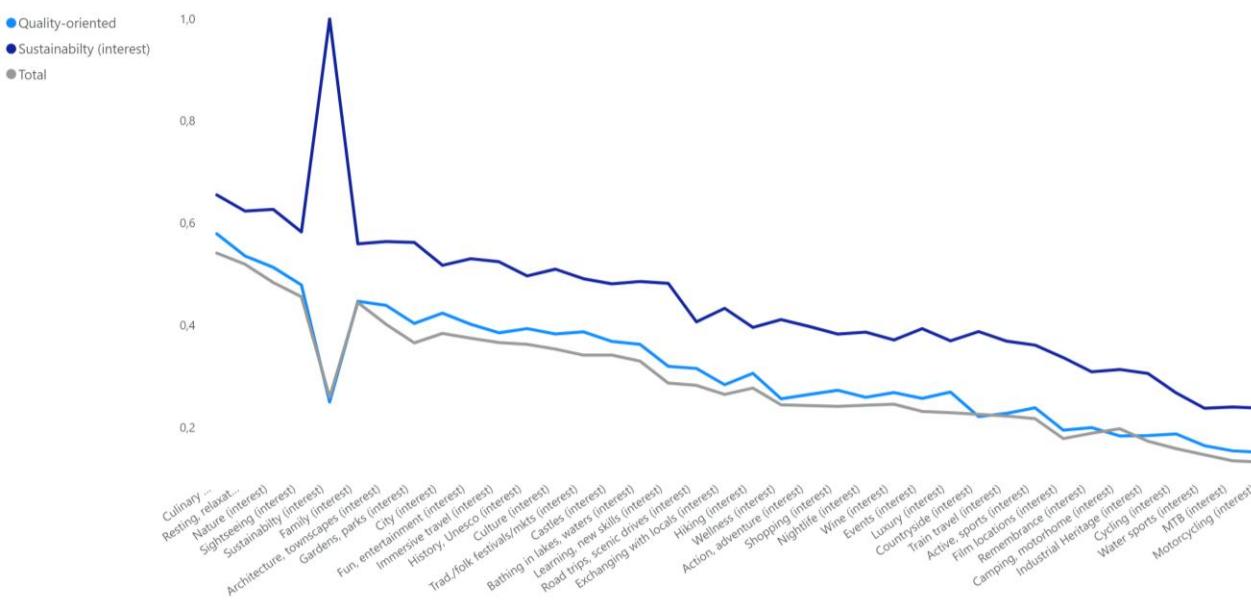


# Trip organisation and preferences (2)

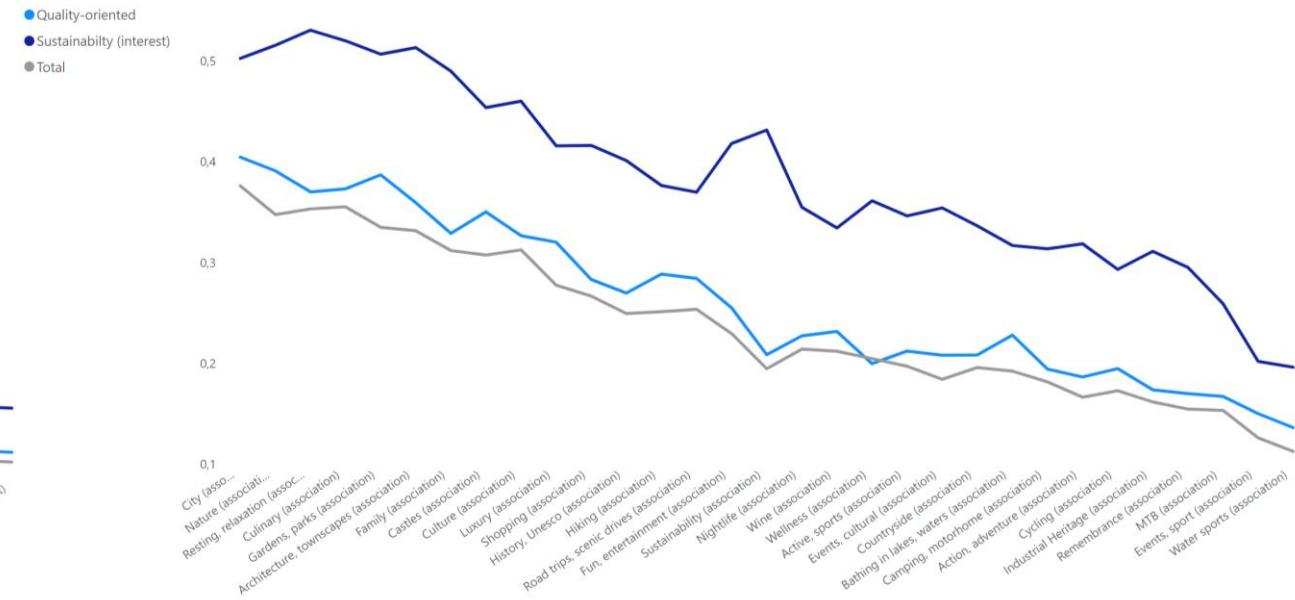
— Average European source markets, total vs. quality-oriented and sustainable travellers



## General theme interest (when going on a holiday)



## Luxembourg's perceived theme suitability



- Sustainable travellers are generally more interested in most travel themes, and they perceive Luxembourg's theme suitability higher across all themes.
- Quality-oriented travellers are closer to all inbound visitors in both aspects.

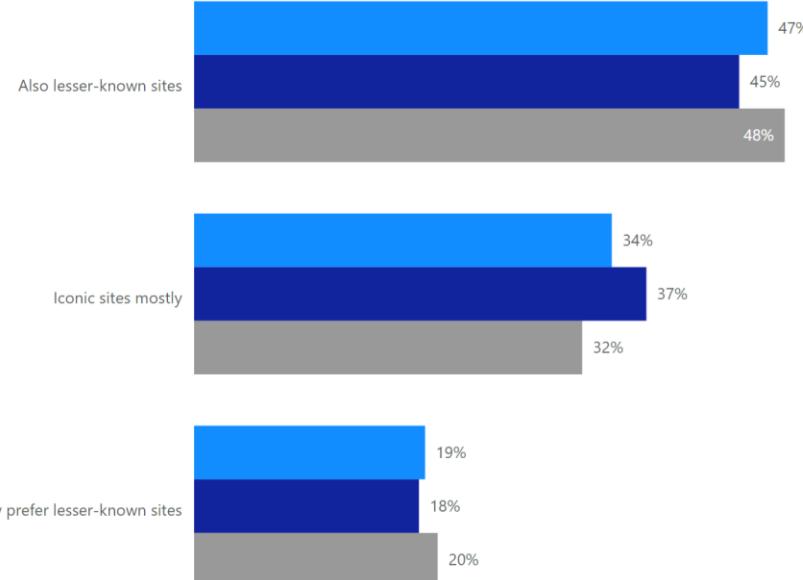


# Trip organisation and preferences (3)

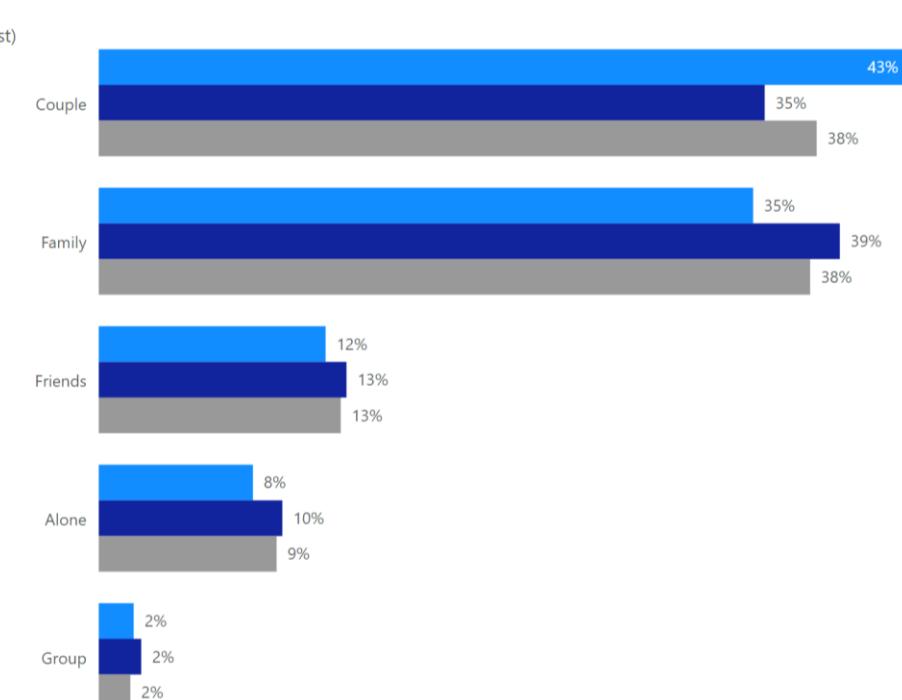
— Average European source markets, total vs. quality-oriented and sustainable travellers

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

● Quality-oriented  
● Sustainability (interest)  
● Total



## Travel party (\*)



- Regarding general preferences for visiting iconic vs. lesser-known sites, quality-oriented travellers are very similar to overall travellers. Travellers interested in sustainability prefer iconic sites slightly more.
- During their last outbound holiday trip, quality-oriented travellers hit the road a bit more often as a couple and slightly less often as a family, compared to all visitors.

(\*) During last outbound holiday trip.

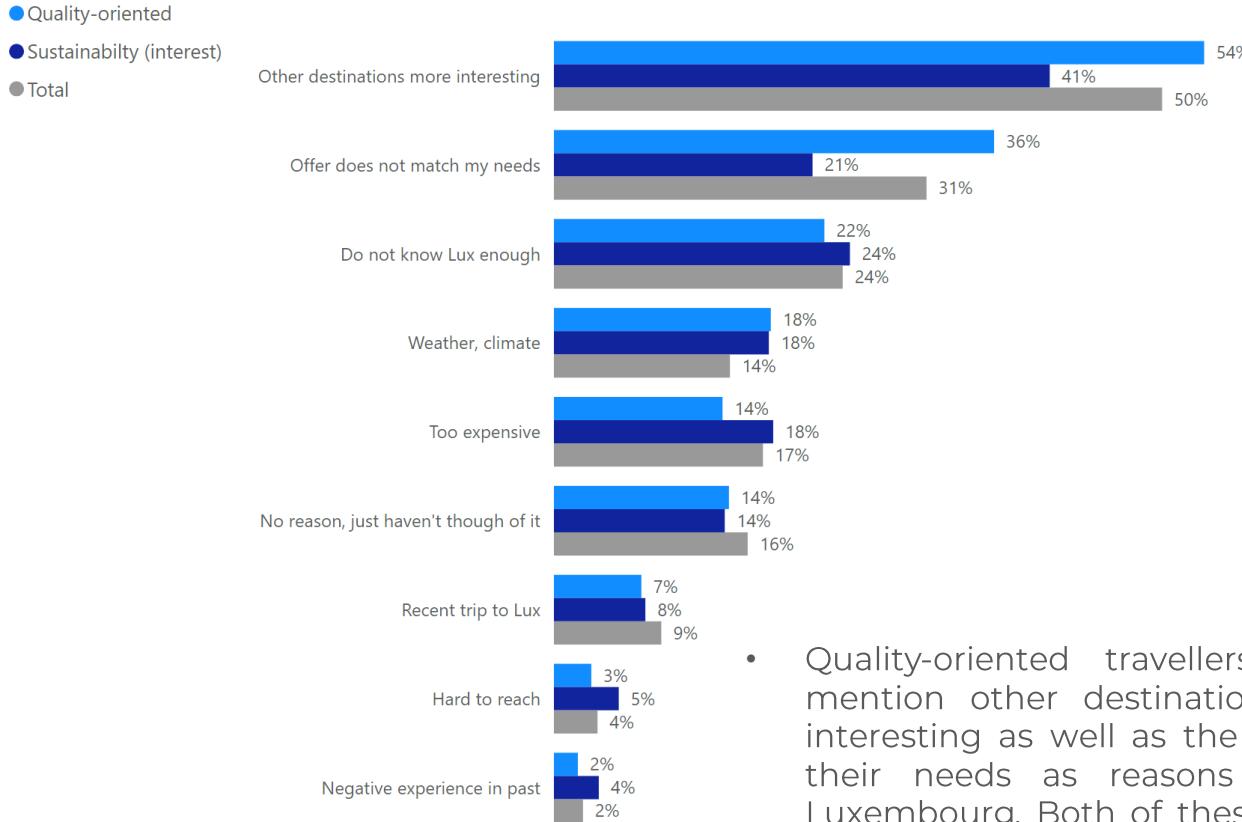
Source: LFT Brand & Potential Study, 2024.



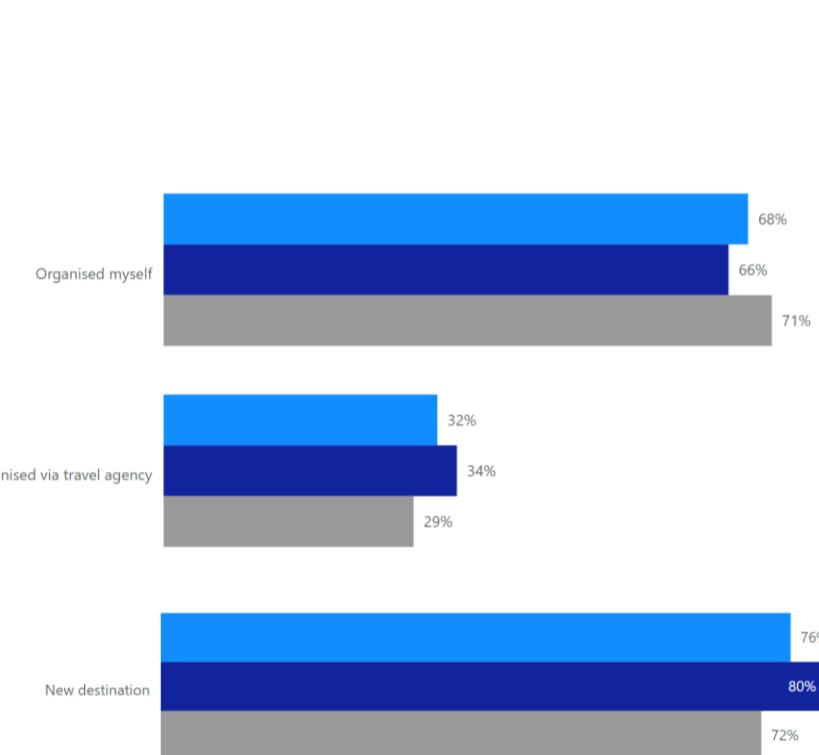
# Trip organisation and preferences (4)

— Average European source markets, total vs. quality-oriented and sustainable travellers

## Reasons for not considering Luxembourg as a destination



## Self-organisation (\*), new destination (\*\*)



- Quality-oriented travellers more frequently mention other destinations as being more interesting as well as the offer not matching their needs as reasons for not choosing Luxembourg. Both of these appear to be less important for sustainable travellers.
- Both groups have organised their trips (slightly) less by themselves and have travelled (a bit) more often to a new destination during their last outbound holiday trip.

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



# Your contact

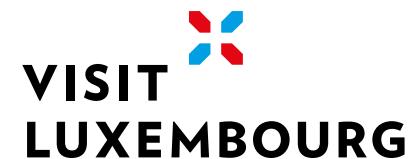


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