



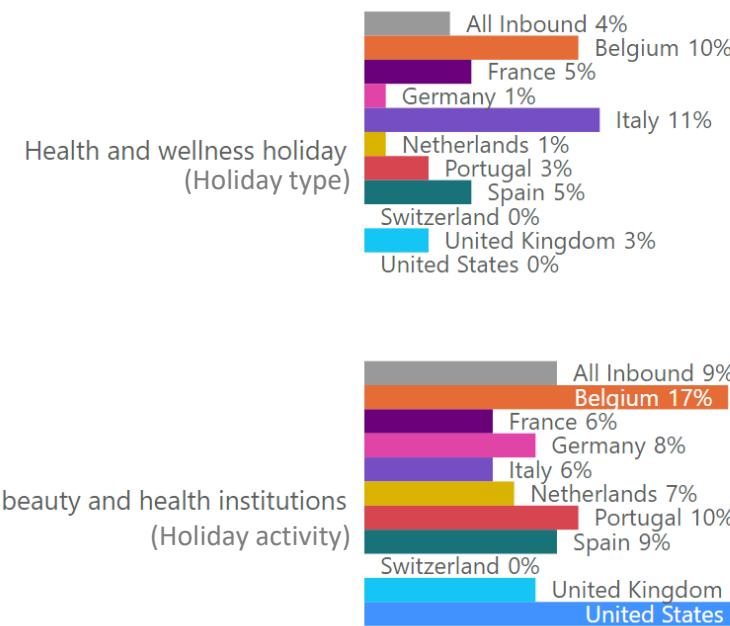
Luxembourg for Tourism
Theme profile
WELLNESS



Market size of Wellness segment

Shares by country of origin

Visitors with overnight

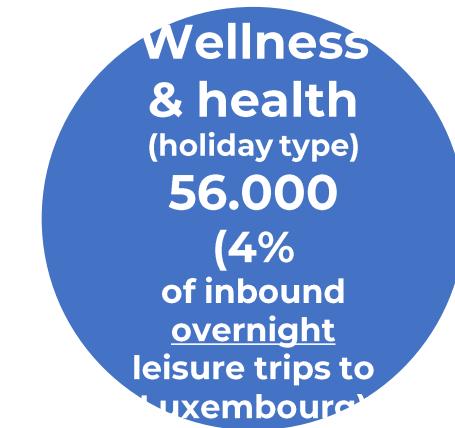


Shares by country of origin

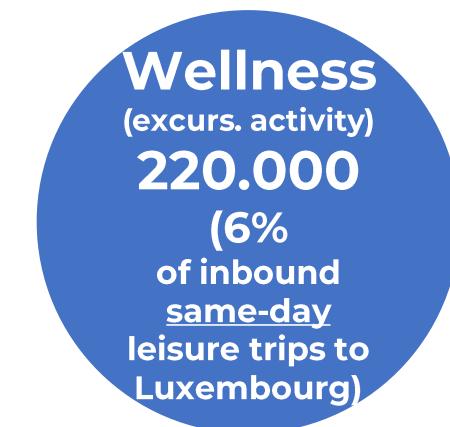
Same-day visitors



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



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

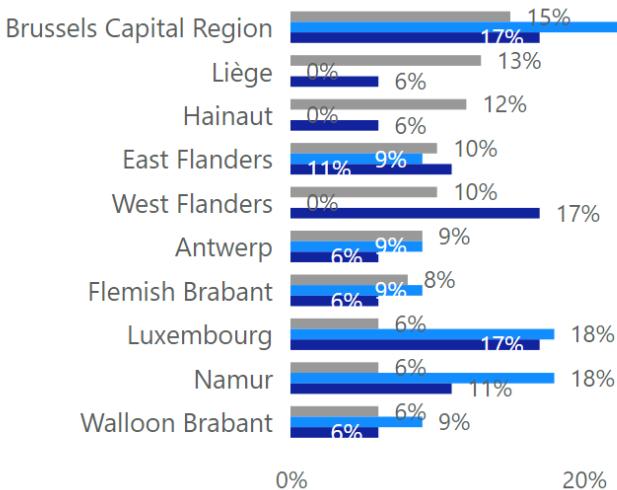


- For visitors with overnights, Belgium shows higher interest of wellness as a holiday type and activity when in Luxembourg, joint by Italy (for holiday type) and the US (for holiday activity).
- A higher-than-average share of French same-day visitors are pursuing wellness as an activity.

Region of origin (BE)

Visitors with overnight

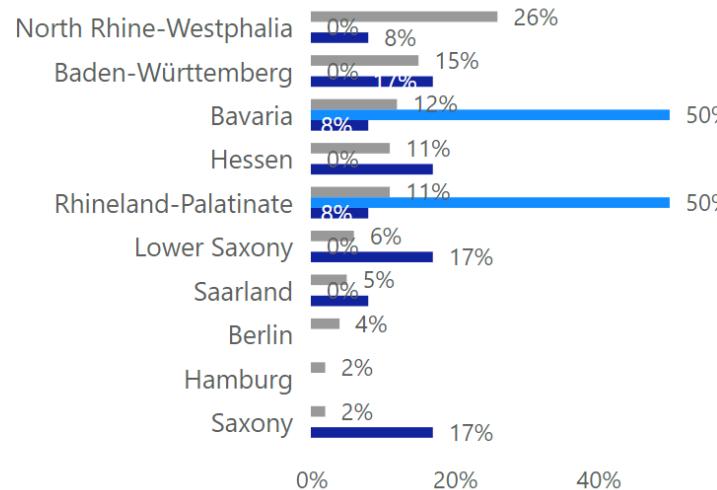
● All Inbound ● Wellness & health (holiday tr... ● Wellness (activity)



Region of origin (DE)

Visitors with overnight

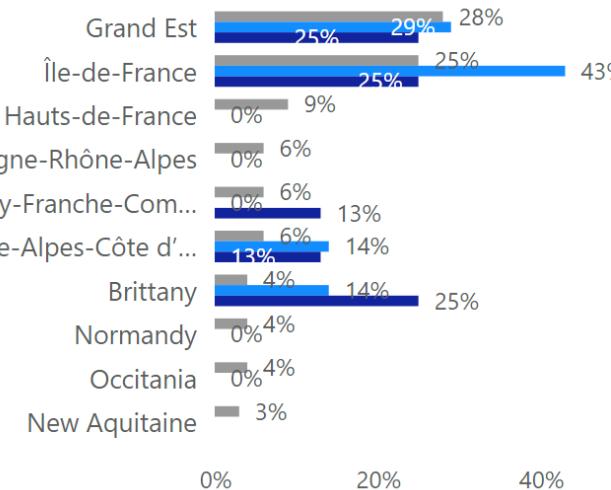
● All Inbound ● Wellness & health (holiday tr... ● Wellness (activity)



Region of origin (FR)

Visitors with overnight

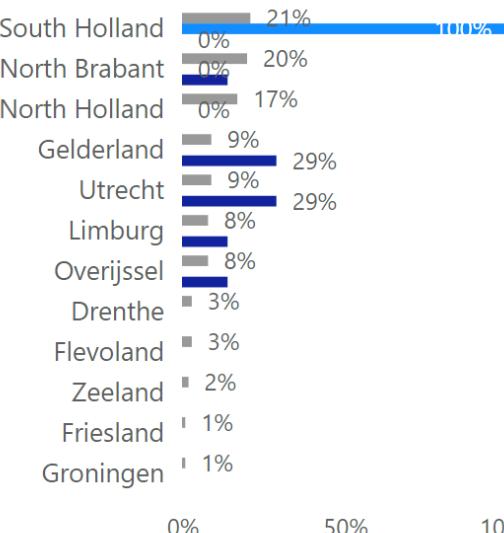
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Region of origin (NL)

Visitors with overnight

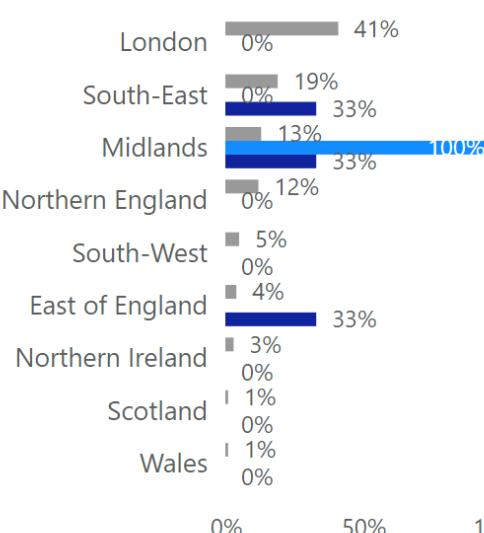
● All Inbound ● Wellness & health (holiday tr... ● Wellness (activity)



Region of origin (UK)

Visitors with overnight

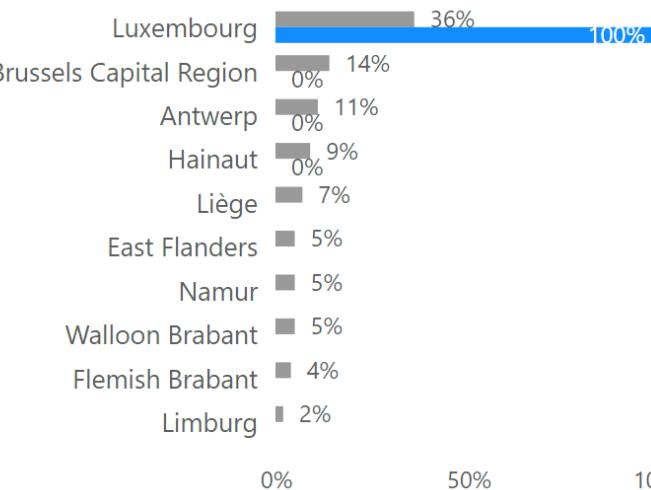
● All Inbound ● Wellness & health (holiday tr... ● Wellness (activity)



Region of origin (BE)

Same-day visitors

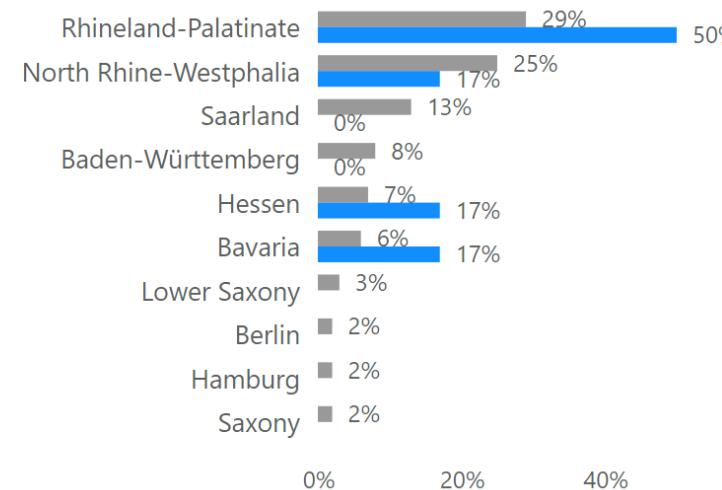
● All Inbound ● Wellness (activity)



Region of origin (DE)

Same-day visitors

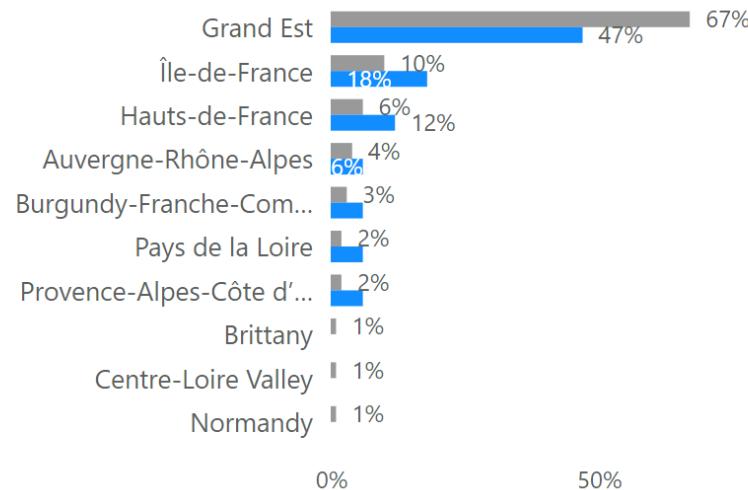
● All Inbound ● Wellness (activity)



Region of origin (FR)

Same-day visitors

● All Inbound ● Wellness (activity)



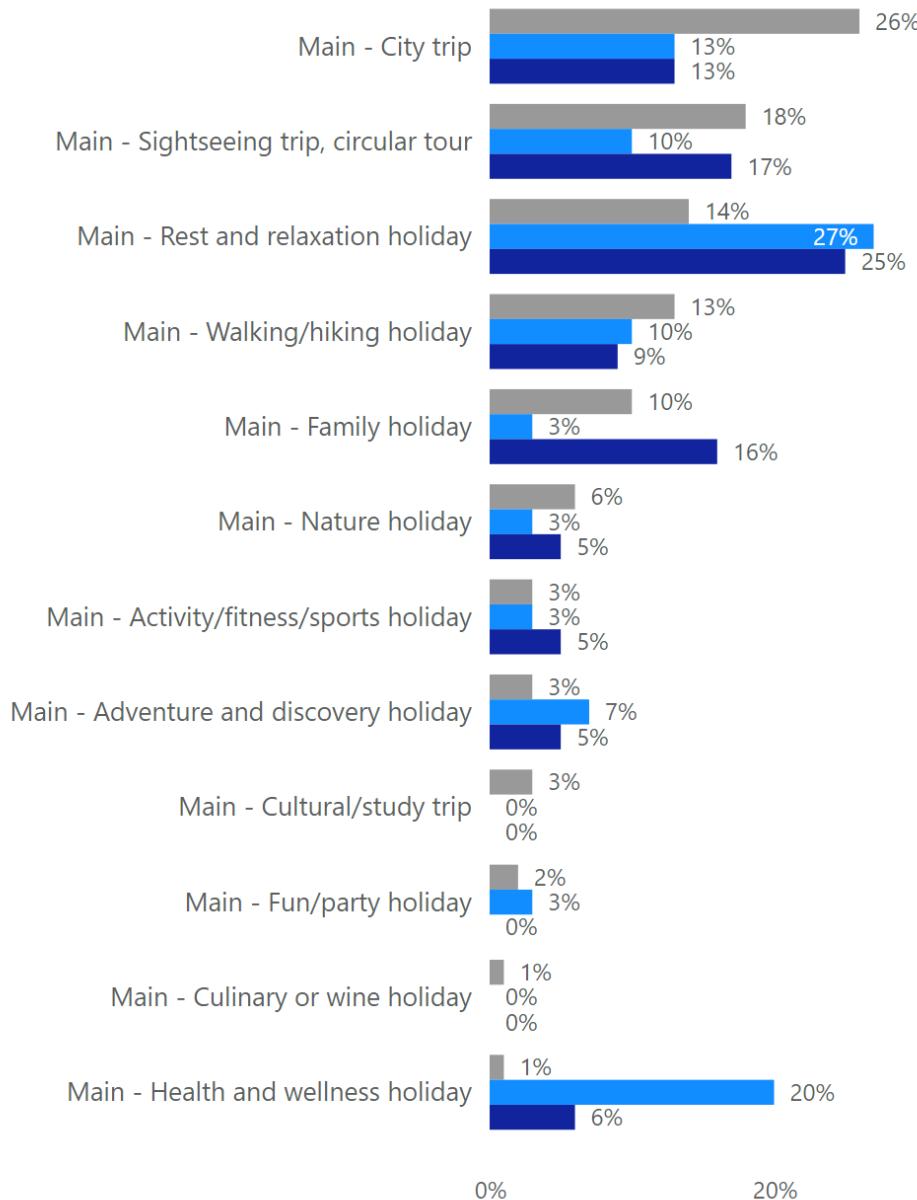


Travel behaviour of leisure visitors in Luxembourg with Wellness as a holiday type / activity

Main holiday types

Visitors with overnight

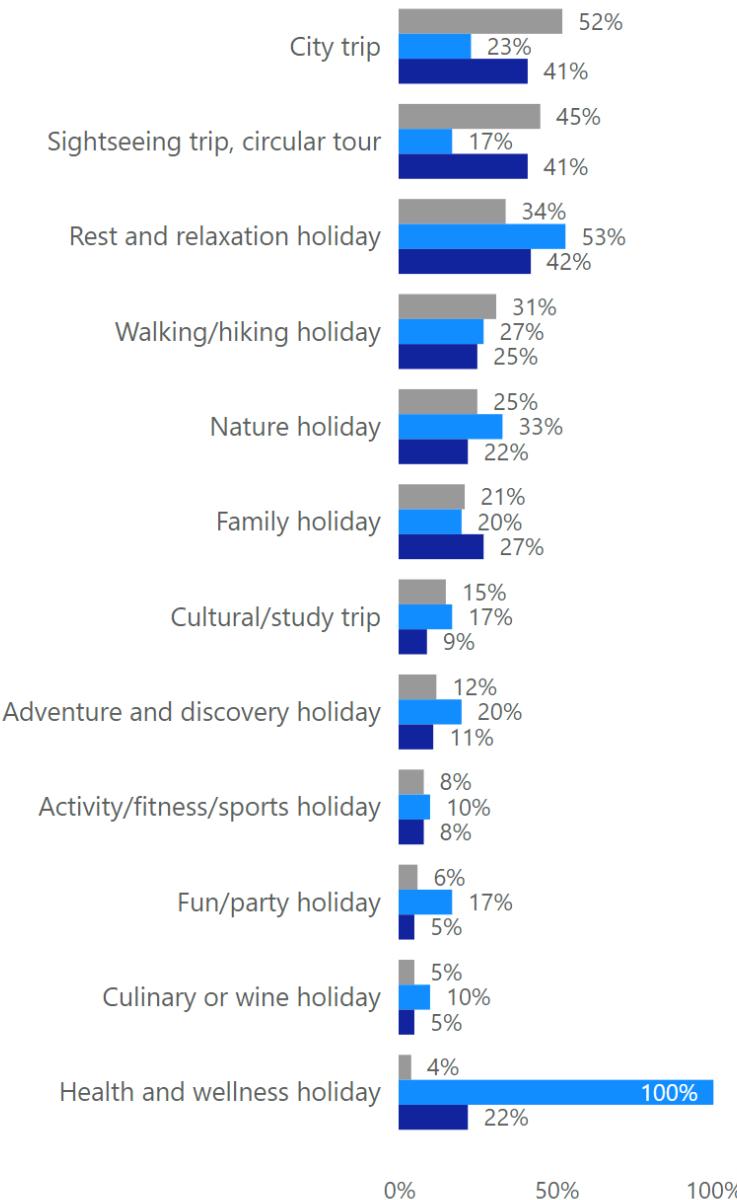
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



All holiday types

Visitors with overnight

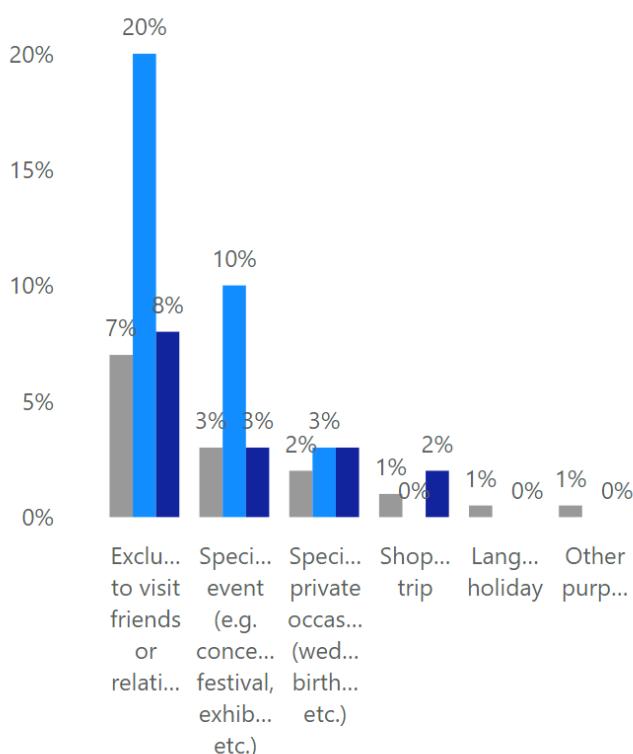
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



- Wellness holidays and activities are more often paired with rest and relaxation holidays. Family holidays show a higher share of wellness activities. City and sightseeing trips are less often paired with wellness holidays.

Main purpose of overnight trip (if not holiday)

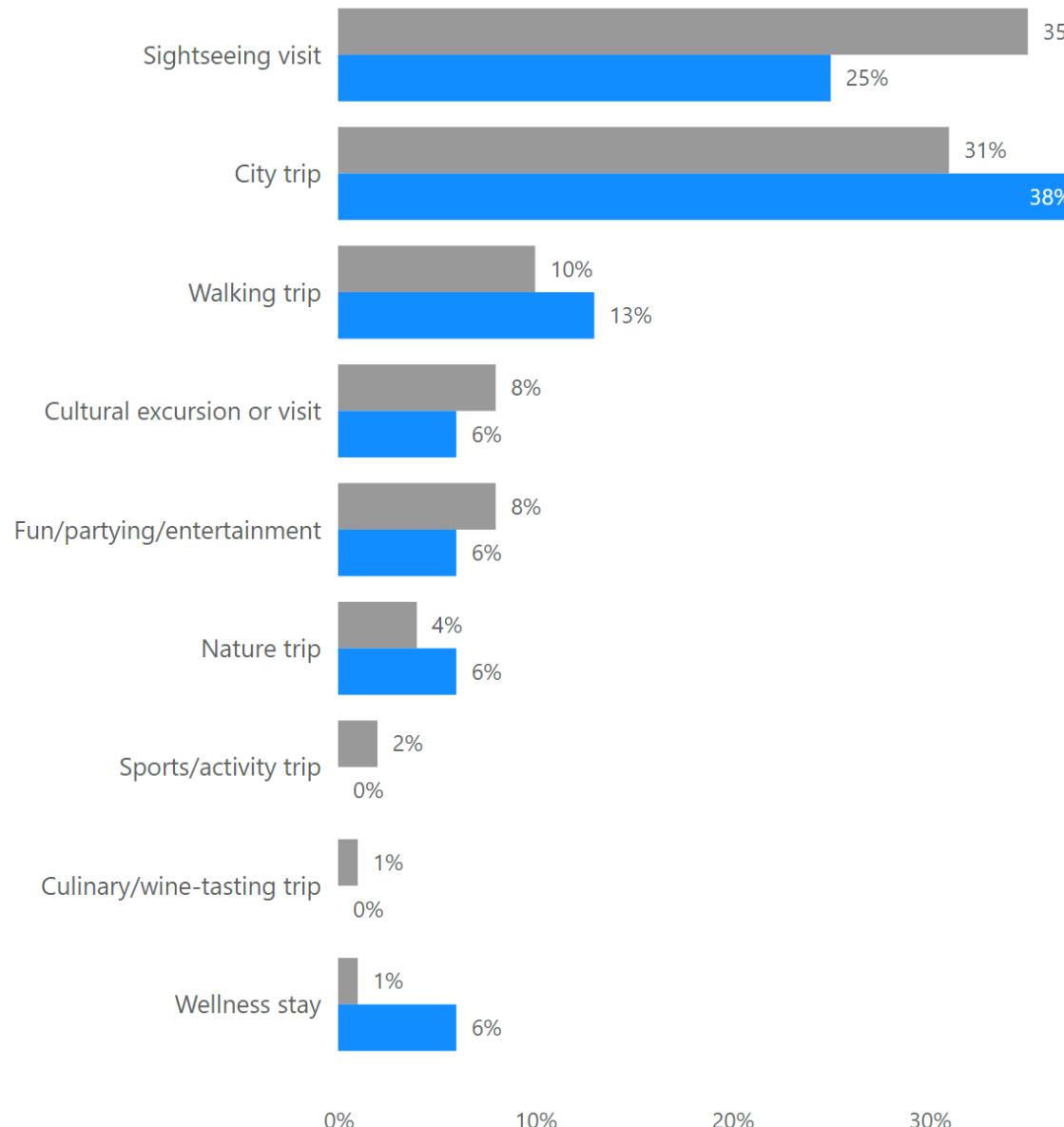
● All Inbound ● Wellness & health (ho... ● Wellness (activity)



Type of excursion

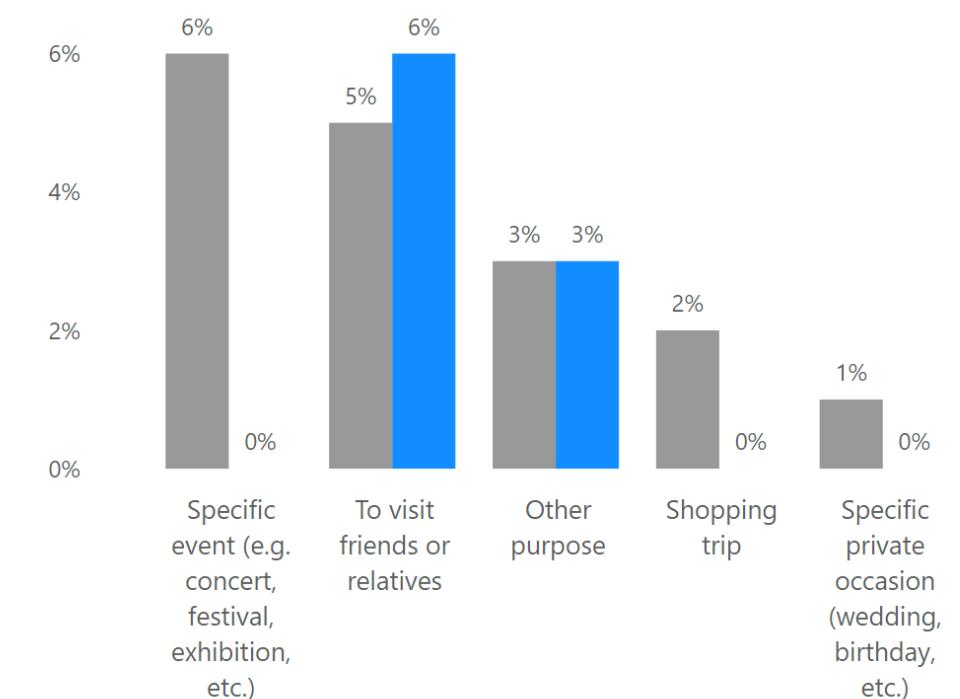
Same-day visitors

● All Inbound ● Wellness (activity)



Main purpose of excursion (if not day trip)

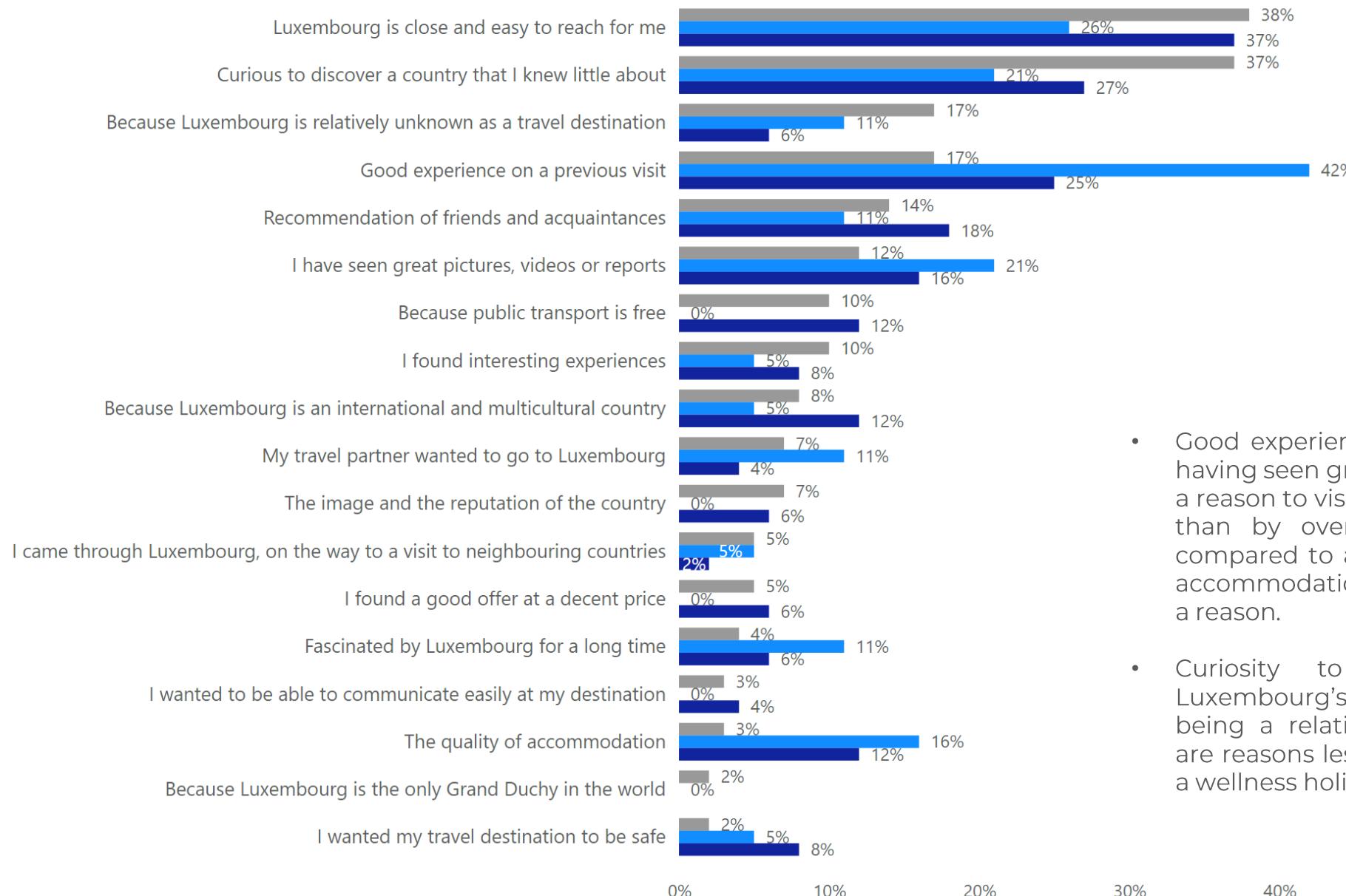
● All Inbound ● Wellness (activity)



Reasons for choosing Luxembourg

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

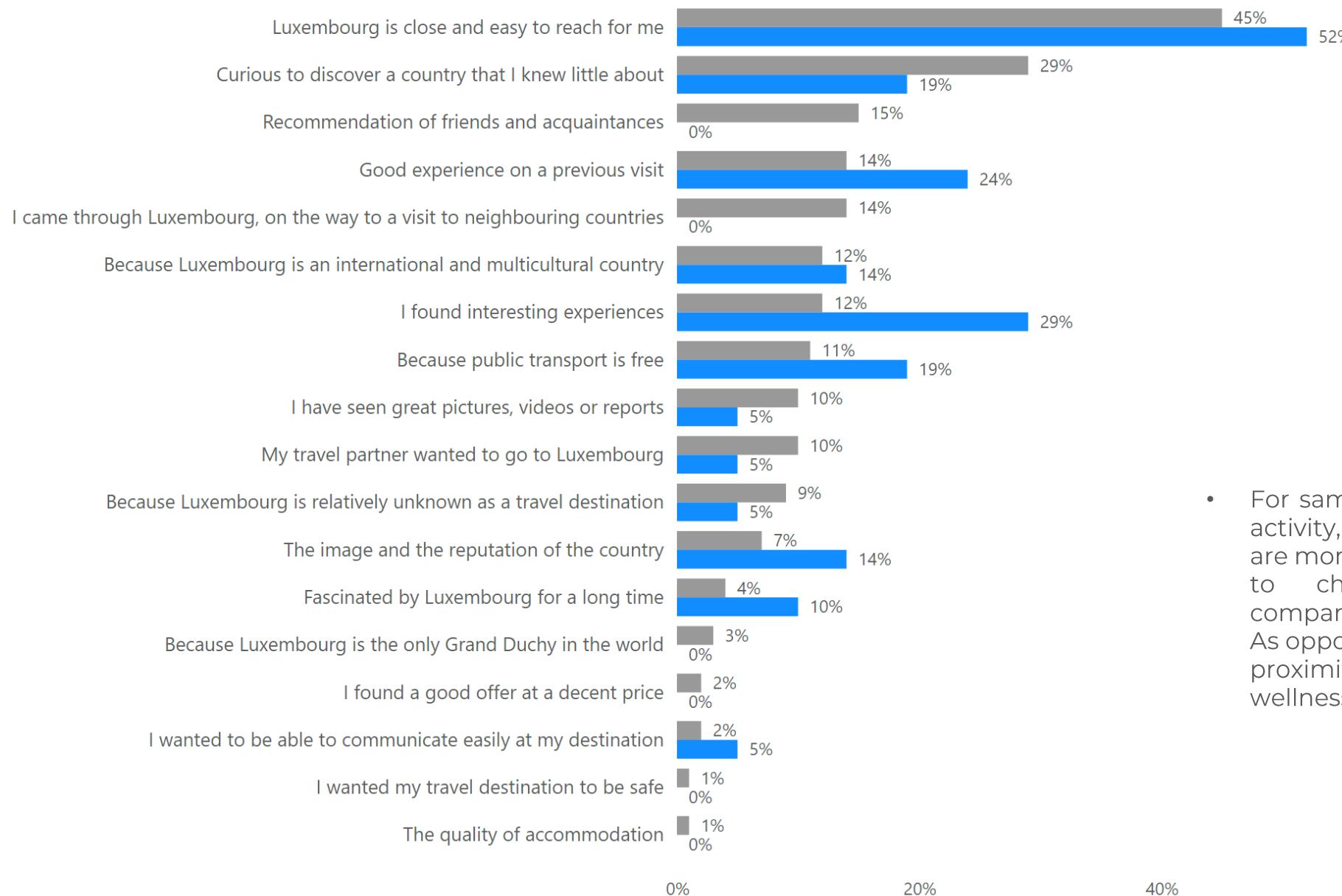


- Good experience on a previous visit as well as having seen great media is a more often cited as a reason to visit Luxembourg by wellness visitors than by overall visitors. Furthermore, when compared to all inbound visitors, the quality of accommodation is far more often mentioned as a reason.
- Curiosity to discover a new country, Luxembourg's proximity as well as Luxembourg being a relatively unknown travel destination are reasons less often mentioned by those with a wellness holiday or activity.

Reasons for choosing Luxembourg

Same-day visitors

● All Inbound ● Wellness (activity)

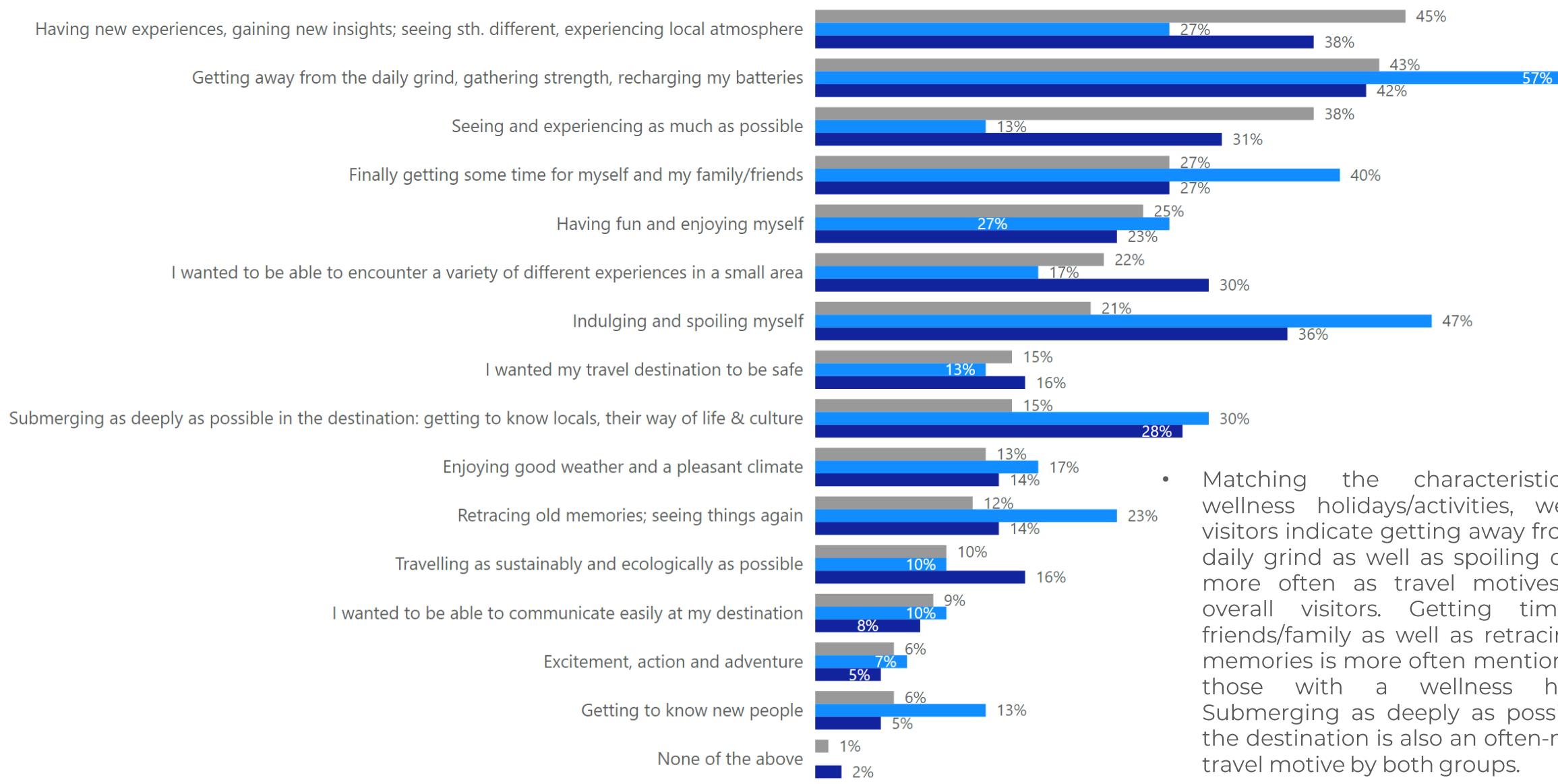


- For same-day visitors with a wellness activity, good/interesting experiences are more often mentioned as a reason to choose Luxembourg when compared to overall same-day visitors. As opposed to visitors with overnights, proximity is a key choice criteria for wellness same-day visitors.

Travel motives

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

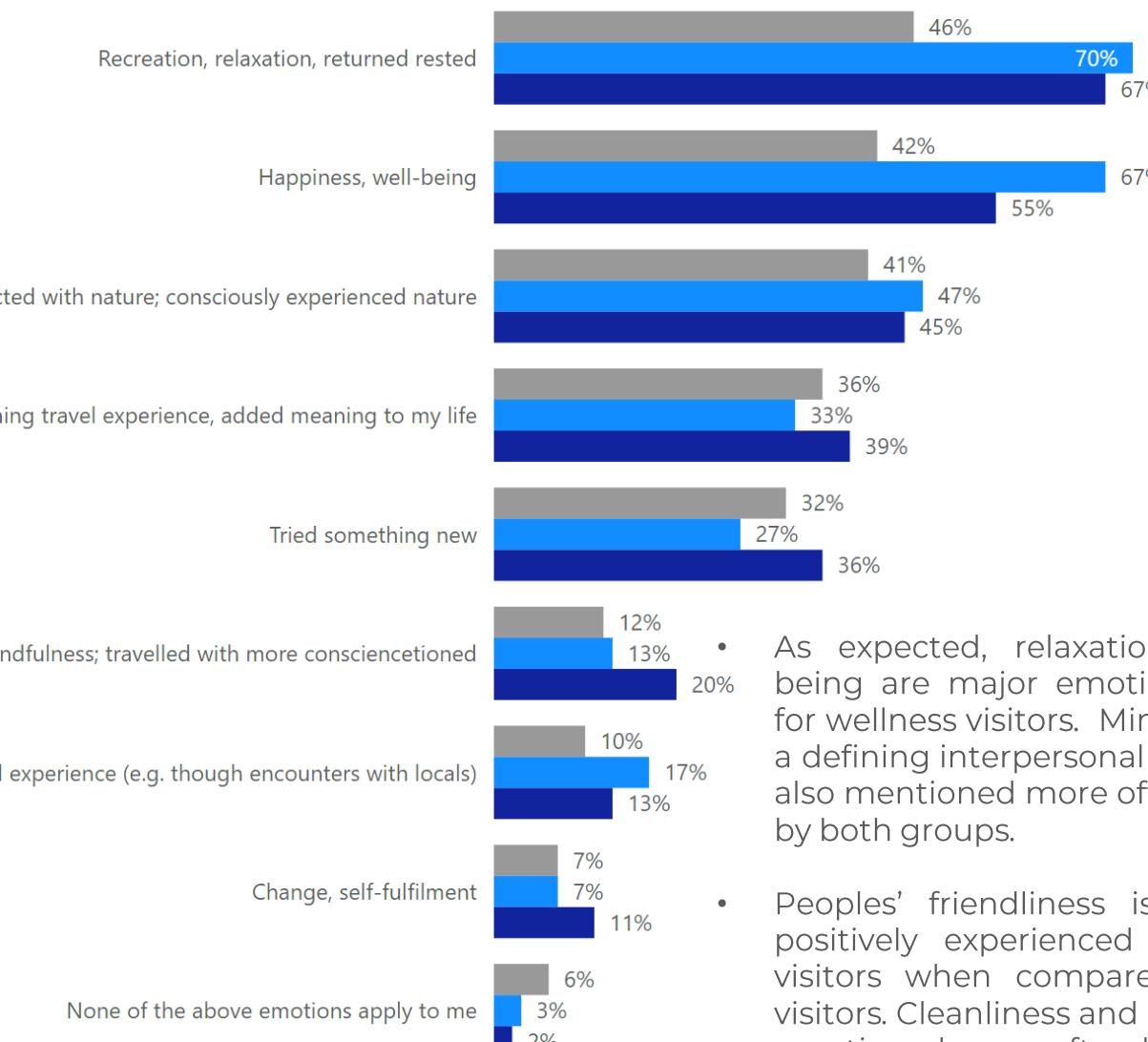


- Matching the characteristics of wellness holidays/activities, wellness visitors indicate getting away from the daily grind as well as spoiling oneself more often as travel motives than overall visitors. Getting time for friends/family as well as retracing old memories is more often mentioned by those with a wellness holiday. Submerging as deeply as possible in the destination is also an often-named travel motive by both groups.

Emotional benefits experienced during stay

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



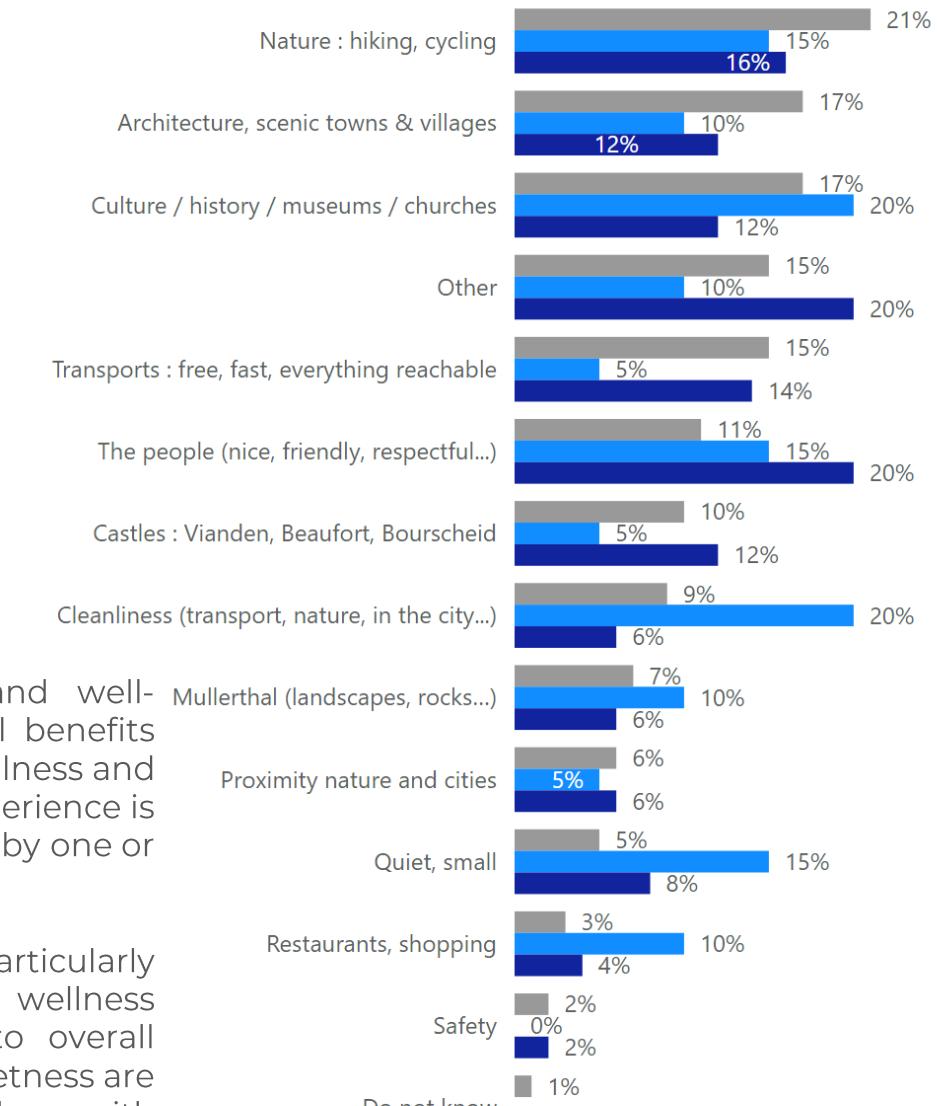
- As expected, relaxation and well-being are major emotional benefits for wellness visitors. Mindfulness and a defining interpersonal experience is also mentioned more often by one or by both groups.

- Peoples' friendliness is particularly positively experienced by wellness visitors when compared to overall visitors. Cleanliness and quietness are mentioned more often by those with a wellness holiday.

Particularly positive experience during stay (open question)

Visitors with overnight

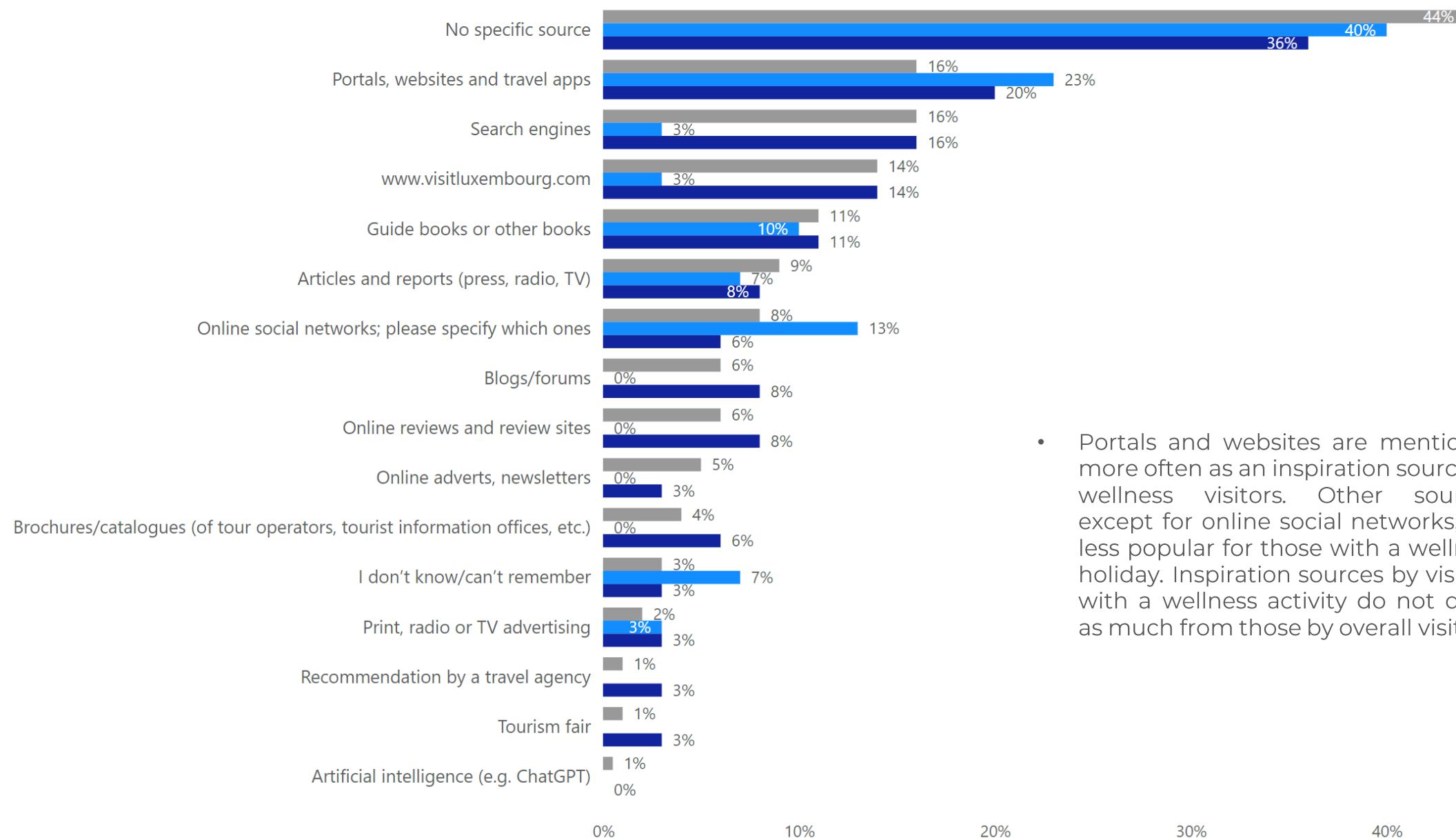
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Inspiration sources

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

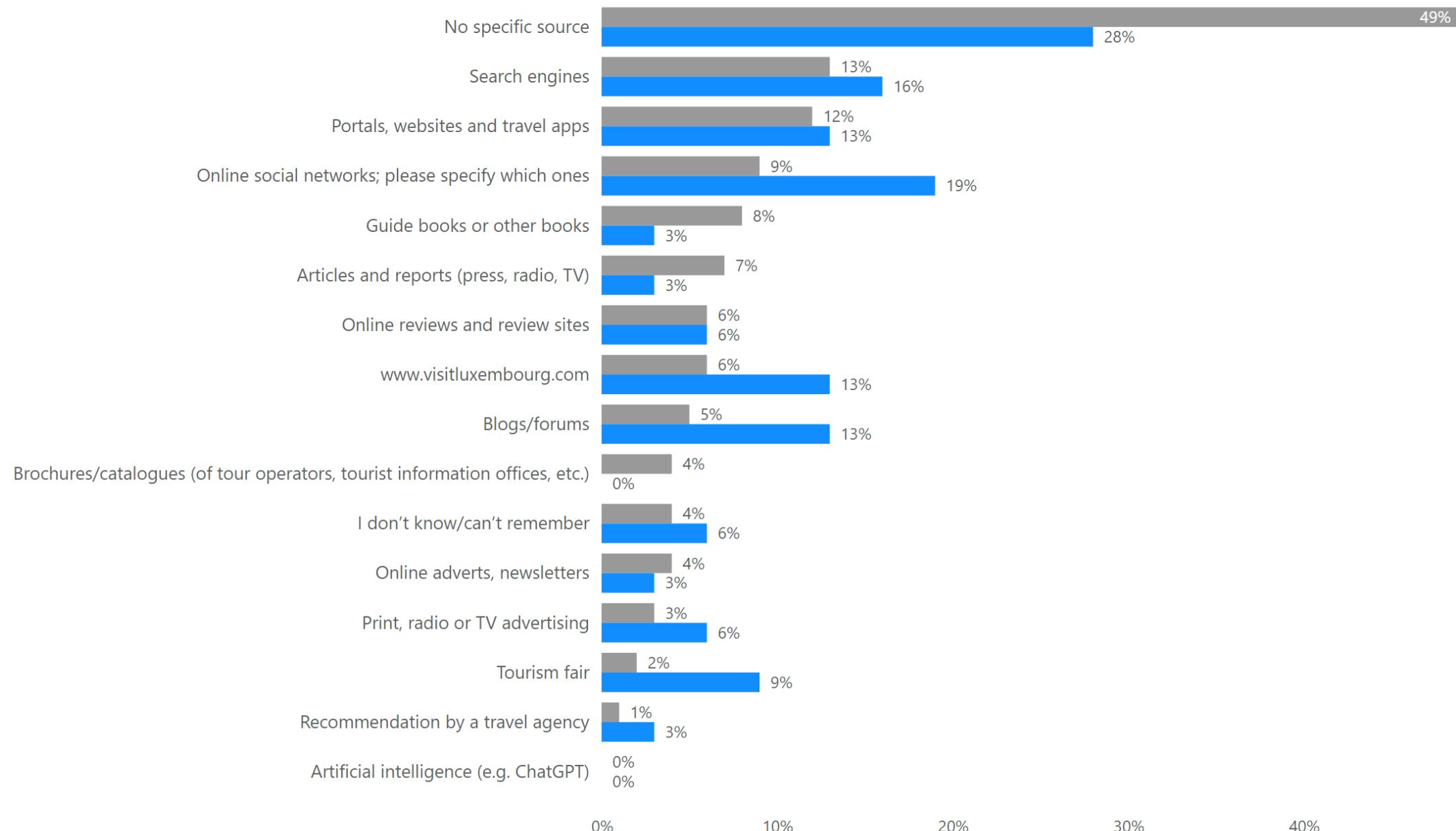


- Portals and websites are mentioned more often as an inspiration source by wellness visitors. Other sources, except for online social networks, are less popular for those with a wellness holiday. Inspiration sources by visitors with a wellness activity do not differ as much from those by overall visitors.

Inspiration sources

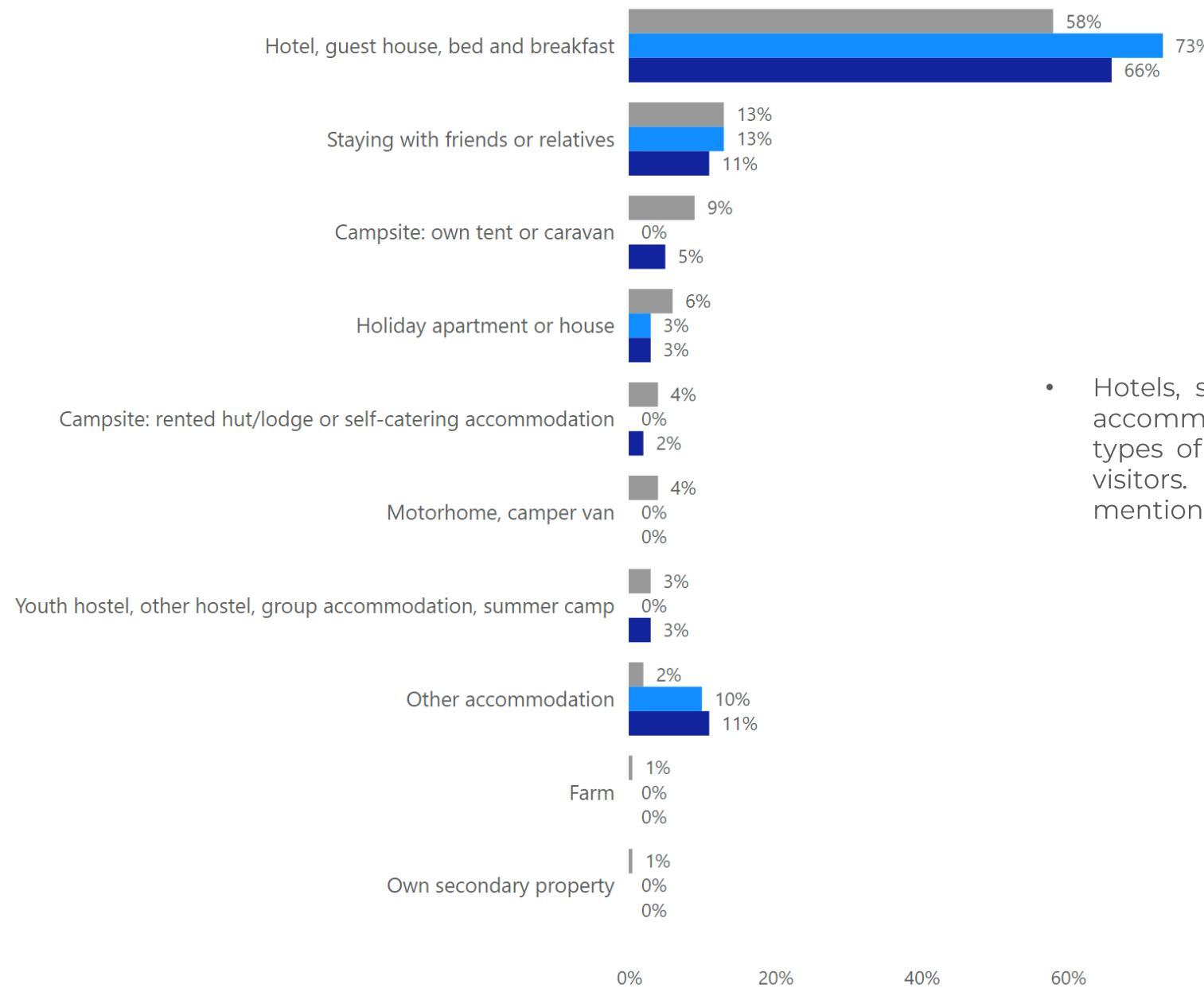
Same-day visitors

● All Inbound ● Wellness (activity)



Type of accommodation

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

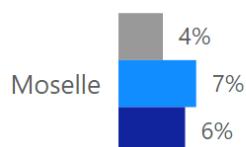
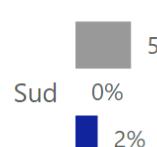
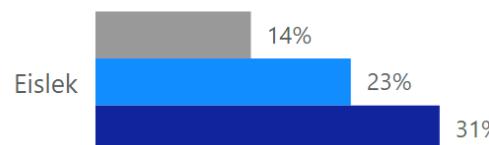


- Hotels, staying with friends and other accommodations are the three main types of accommodations for wellness visitors. Other types are less/not mentioned.

Destination region

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



0% 20% 40% 60%

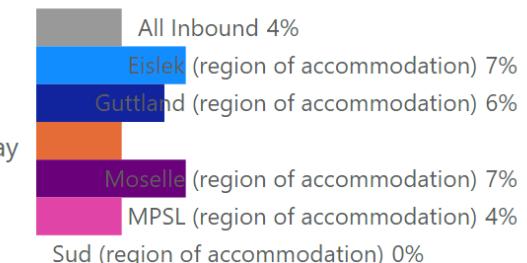
Shares by destination region

Visitors with overnight

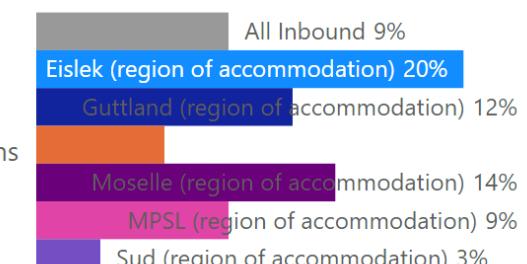
0% 10% 20%

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

Health and wellness holiday



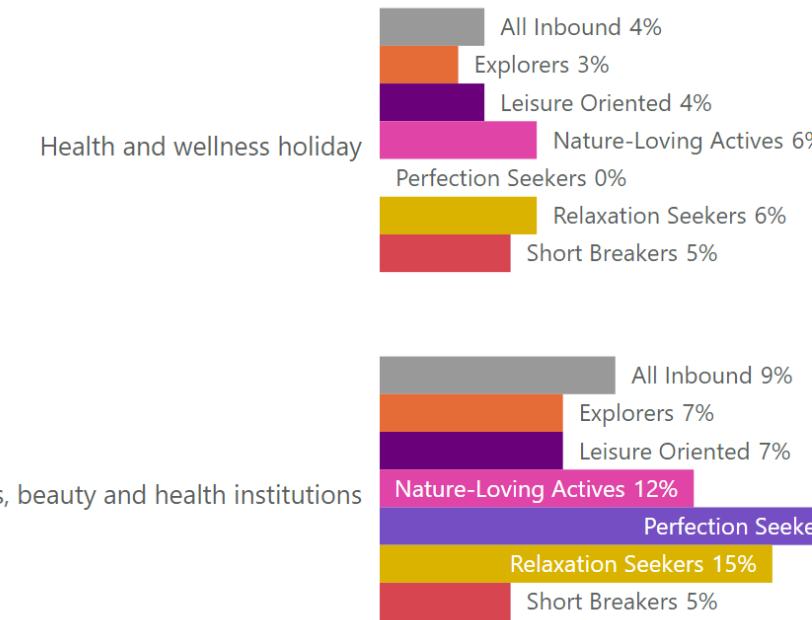
Wellness, beauty and health institutions



- Eislek and Moselle are the regions in which higher shares of visitors engage into wellness activities, or have mentioned wellness as a holiday type.

Shares by target segments

Visitors with overnight



Shares by target segments

Same-day visitors

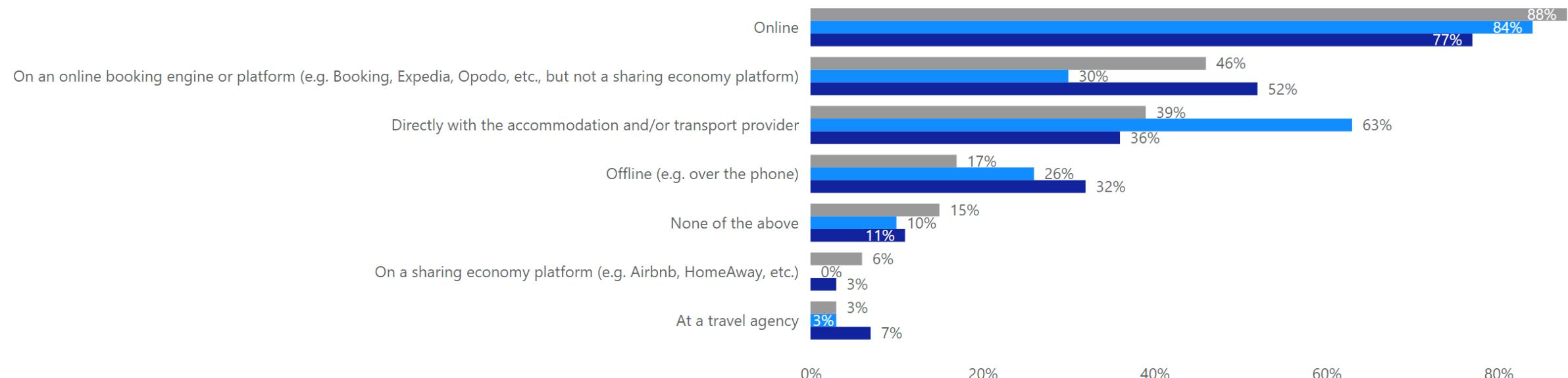


- A larger-than-average of Nature-Loving Actives and Relaxation Seekers are doing wellness as a holiday type or activity (the latter is also more popular than average among Perfection Seekers)
- Among same-day visitors, Perfection Seekers as well as Leisure Oriented travellers show the highest interest in wellness when in Luxembourg.

Booking channels

Visitors with overnight

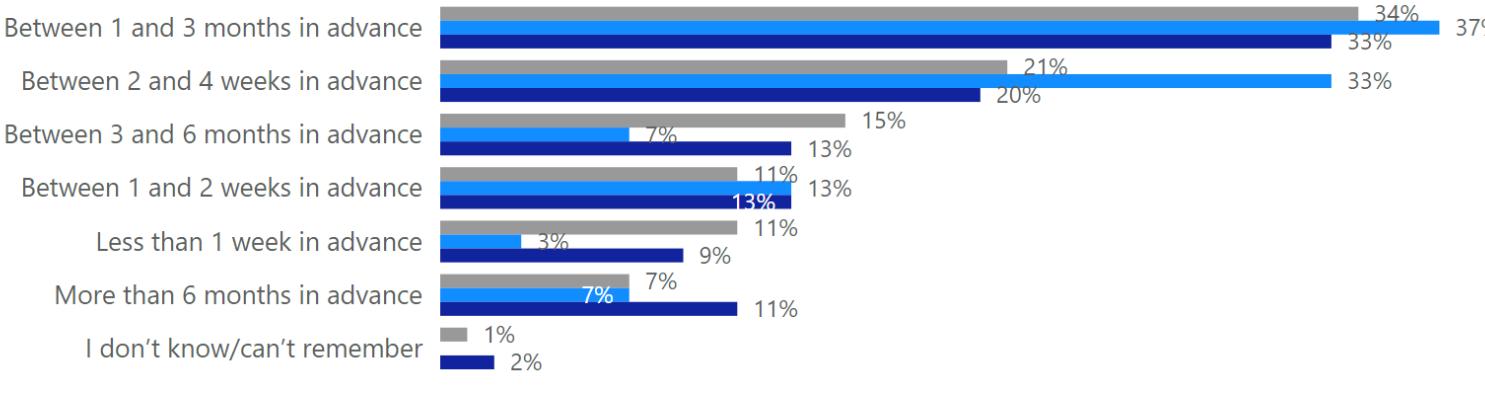
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Decision moment

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

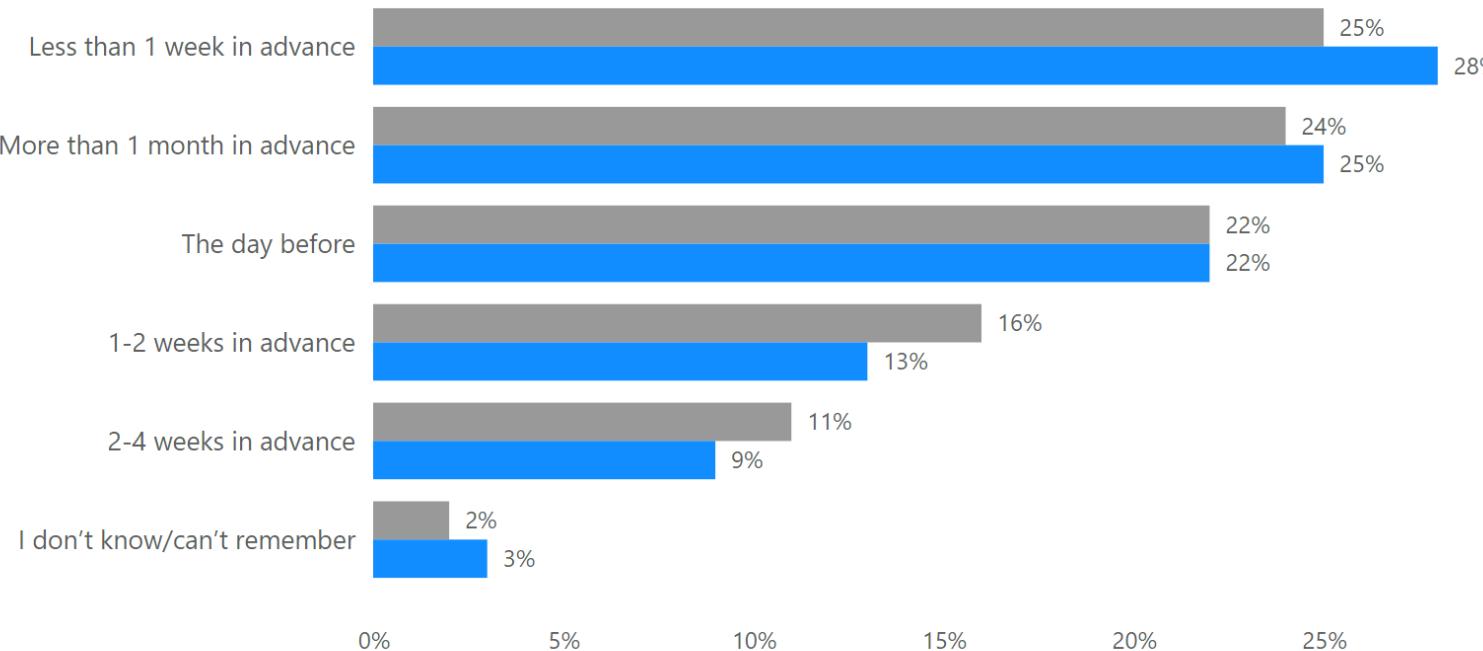


- Visitors with a wellness holiday book especially often directly with the accommodation. Online booking is a little less popular while offline booking is more popular among wellness visitors.
- Visitors with a wellness holiday decide most between 2 weeks and 3 months in advance. Decision moments for those with a wellness activity are more distributed with deciding between 1 and 3 months in advance being the most common timespan.

Decision moment

Same-day visitors

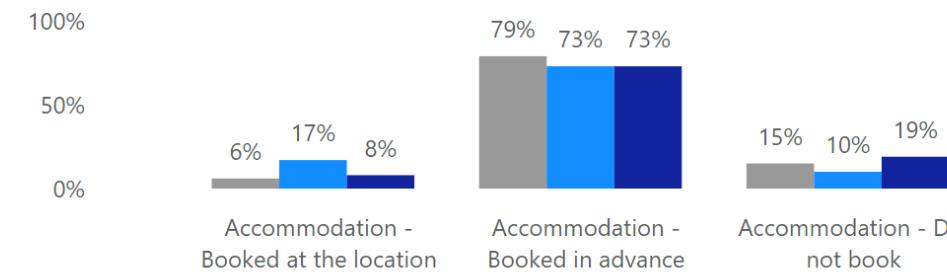
● All Inbound ● Wellness (activity)



Booking of travel items

Accommodation

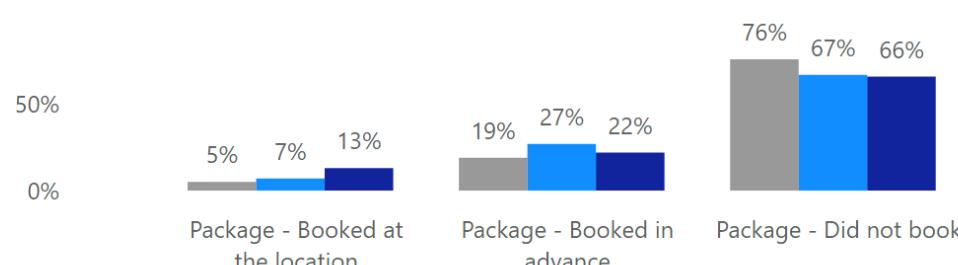
Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Booking of travel items

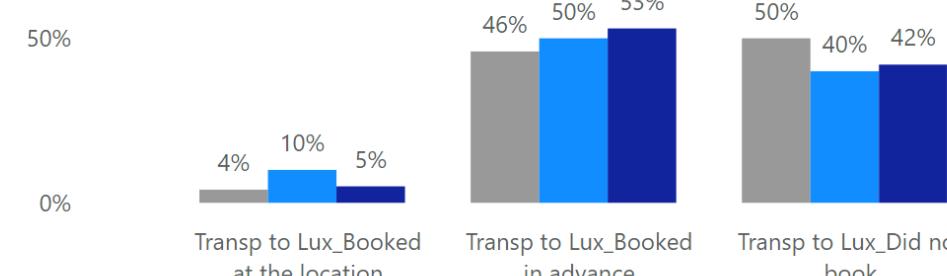
Package

Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



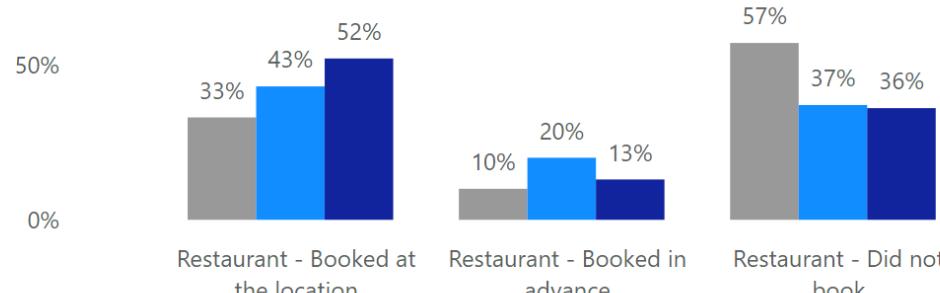
Transport to Luxembourg

Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



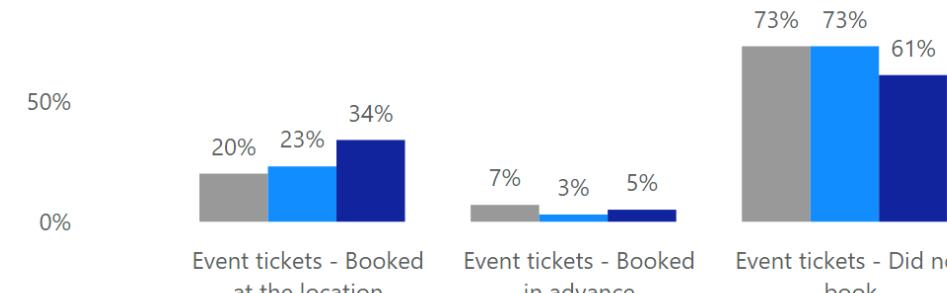
Restaurant

Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



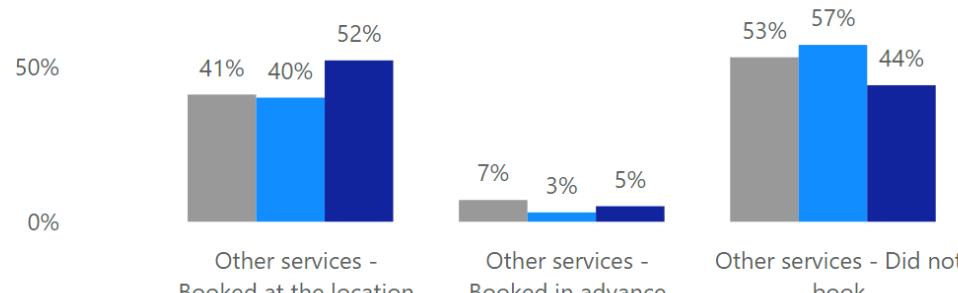
Event tickets

Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Other services

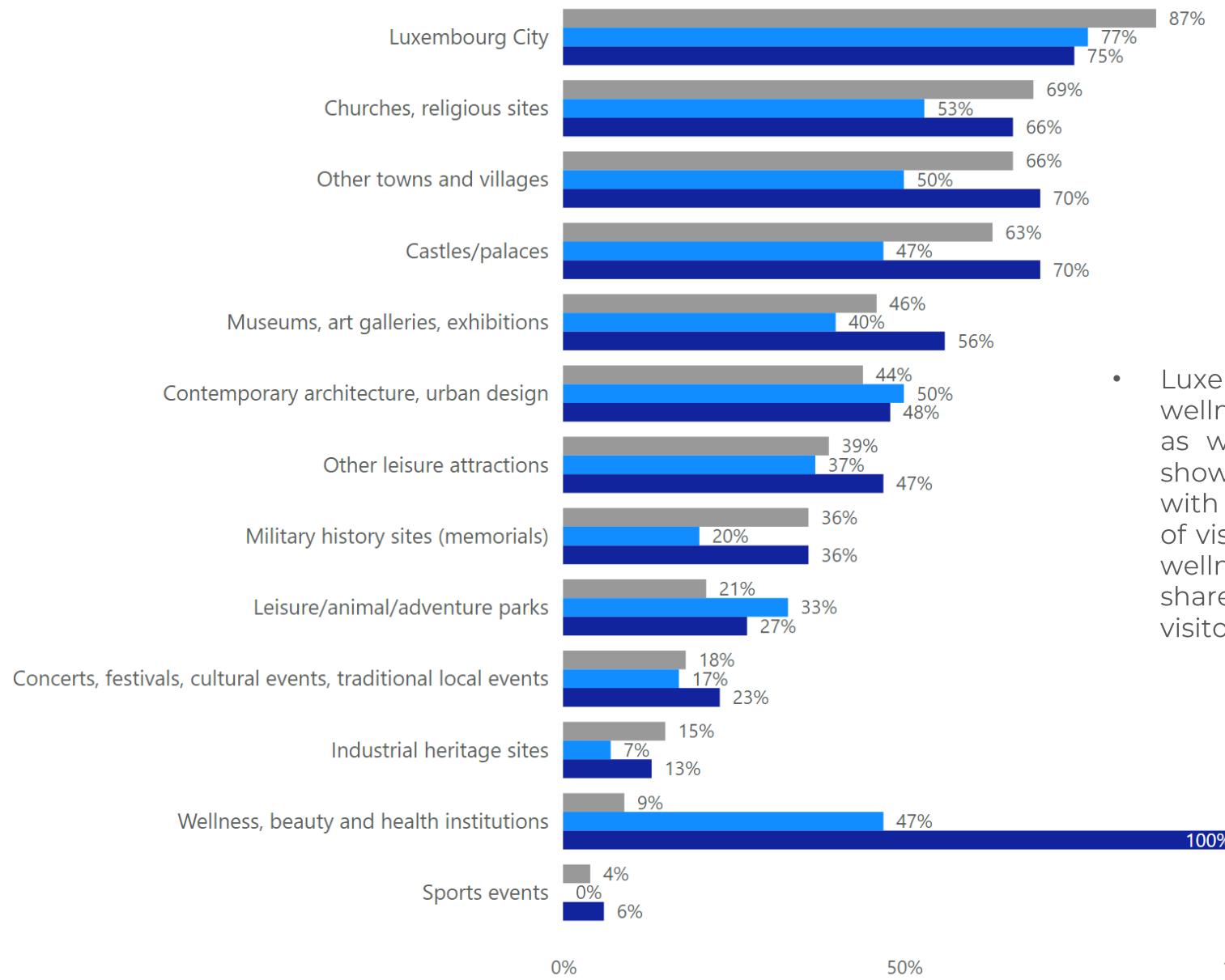
Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Places visited

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

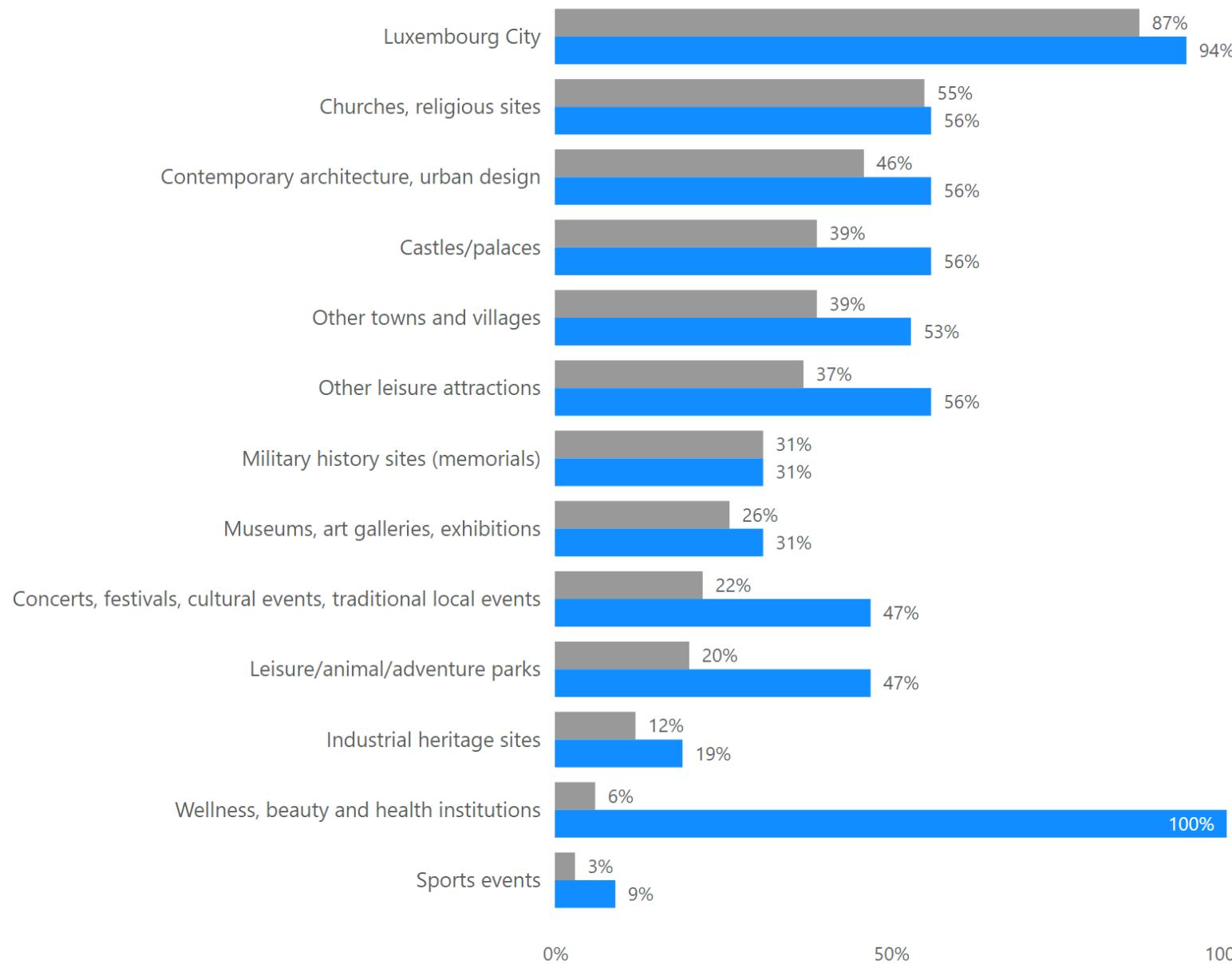


- Luxembourg City is less often visited by wellness visitors. Contemporary architecture as well as leisure/animal/adventure parks show higher shares for both groups. Visitors with a wellness activity show higher shares of visits for most places whilst those with a wellness holiday generally indicate lower shares when compared to all inbound visitors.

Places visited

Same-day visitors

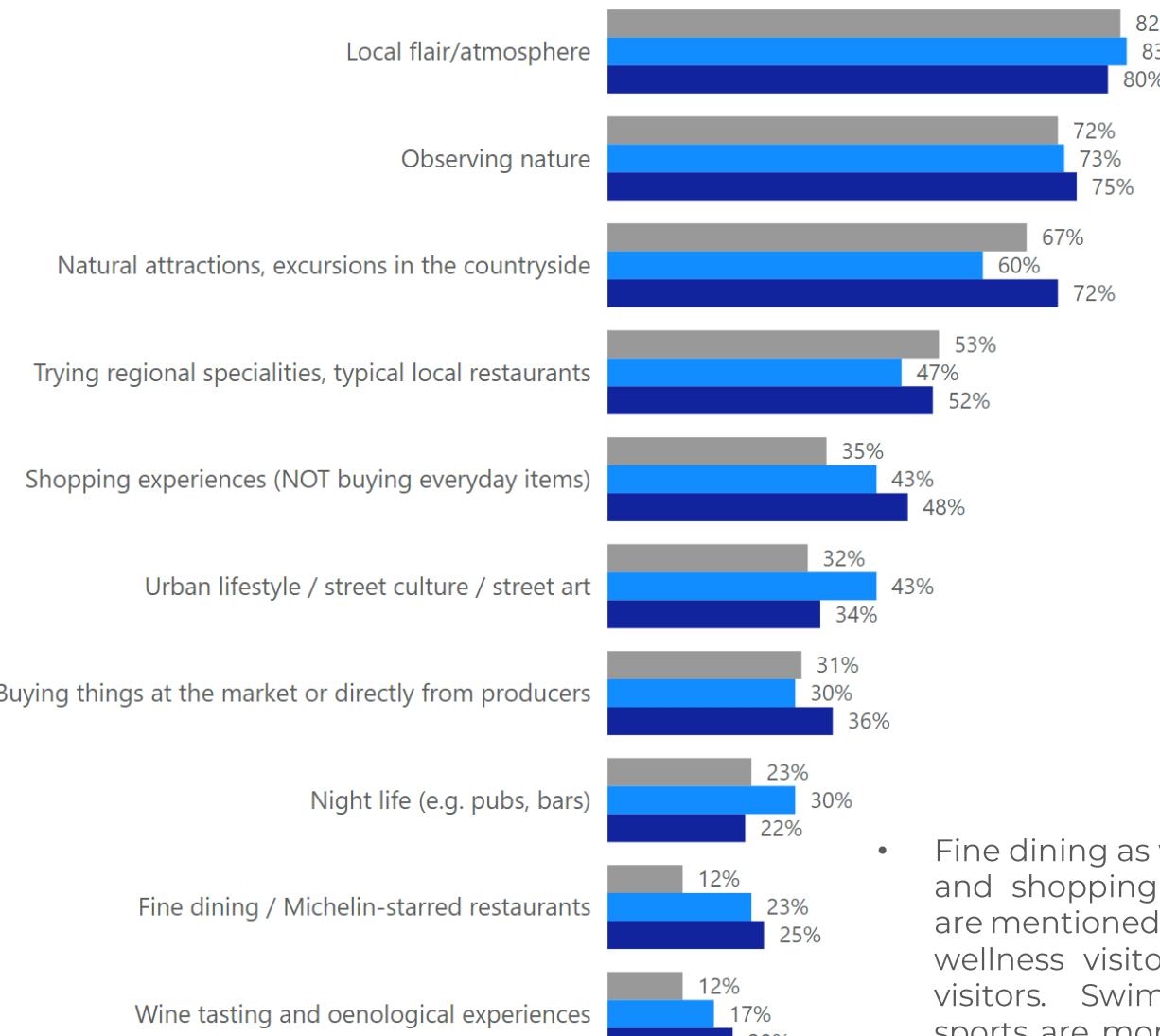
● All Inbound ● Wellness (activity)



Non-sporting activities

Visitors with overnight

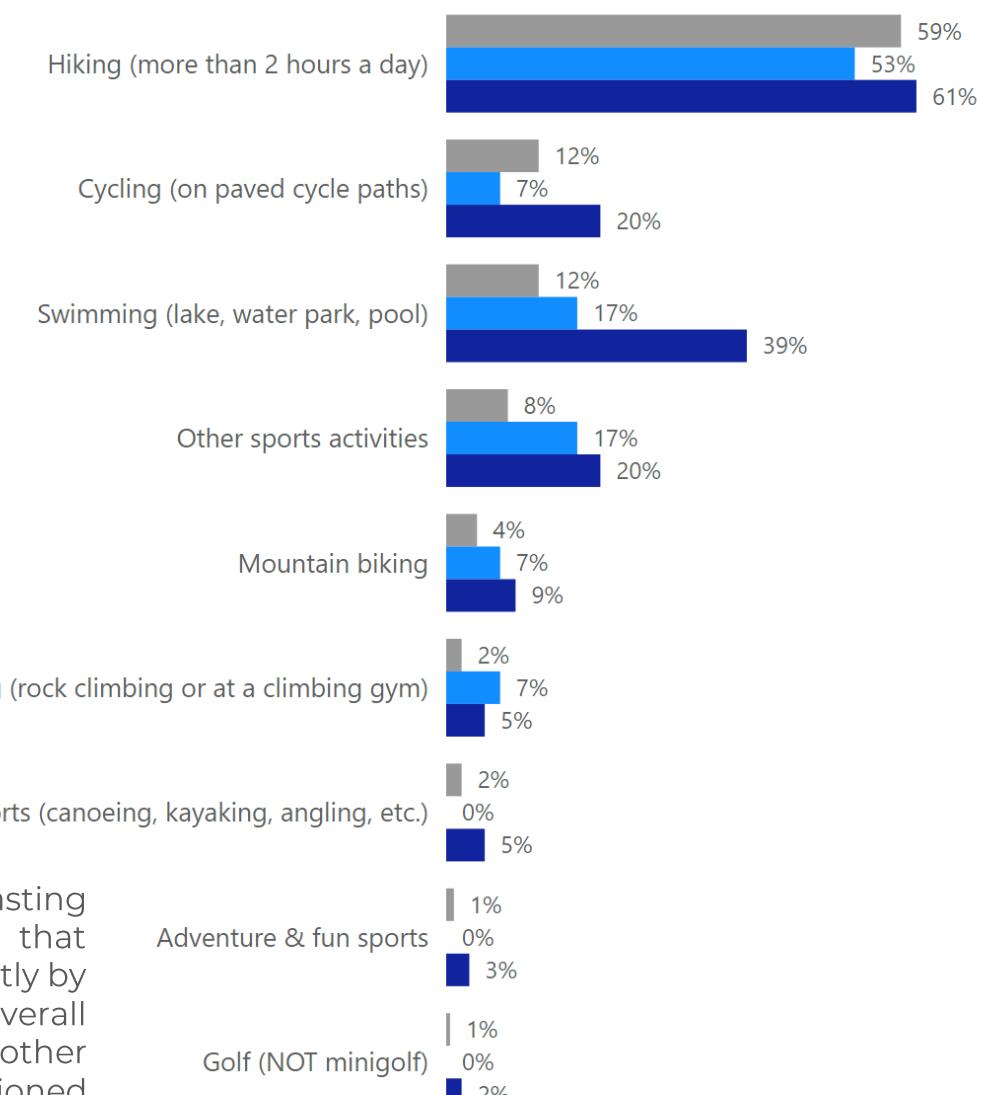
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Sporting activities

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



- Fine dining as well as wine tasting and shopping are activities that are mentioned more frequently by wellness visitors than by overall visitors. Swimming and other sports are more often mentioned regarding sporting activities.

0% 20% 40% 60% 80%

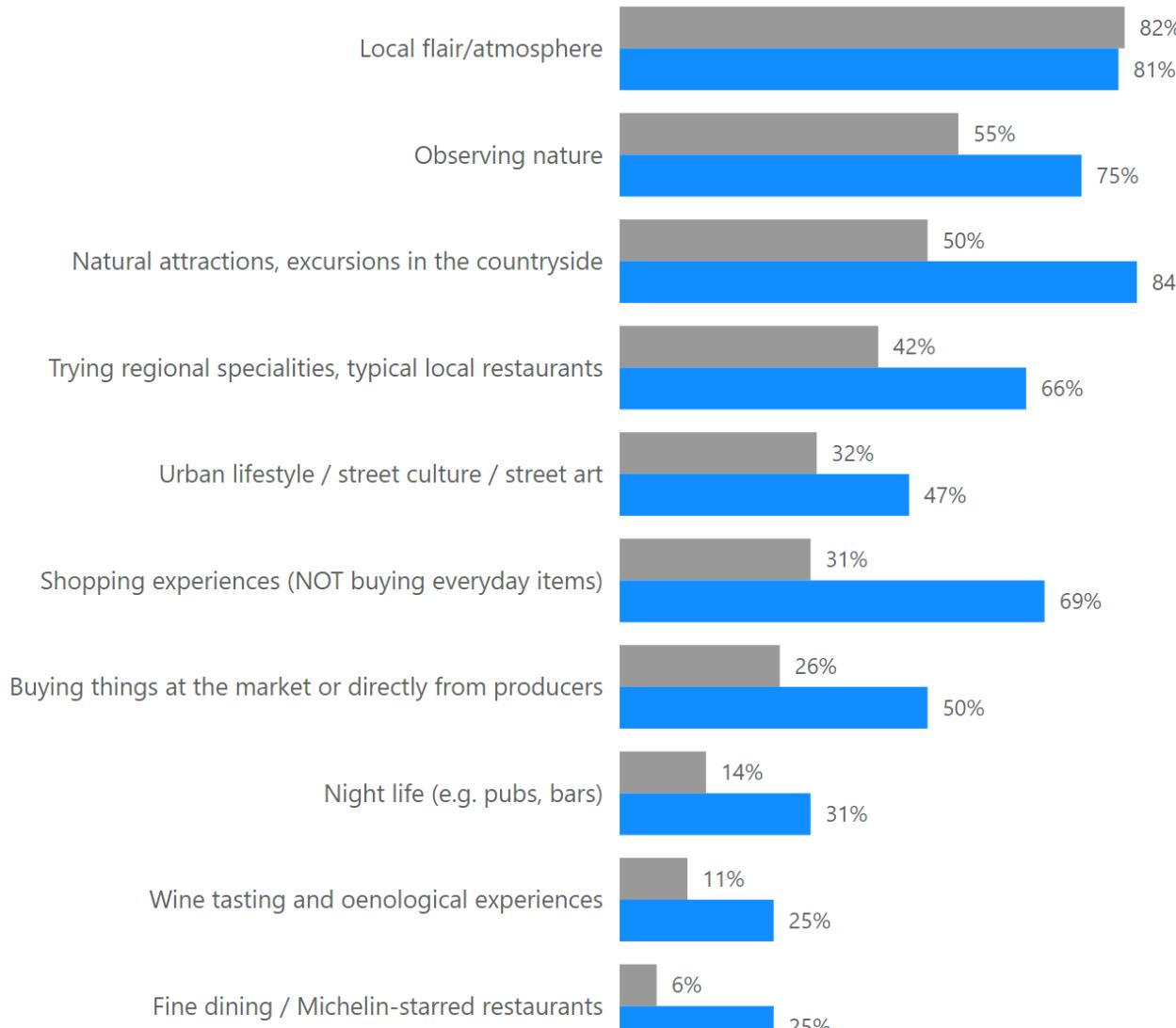
0% 50%

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

Non-sporting activities

Same-day visitors

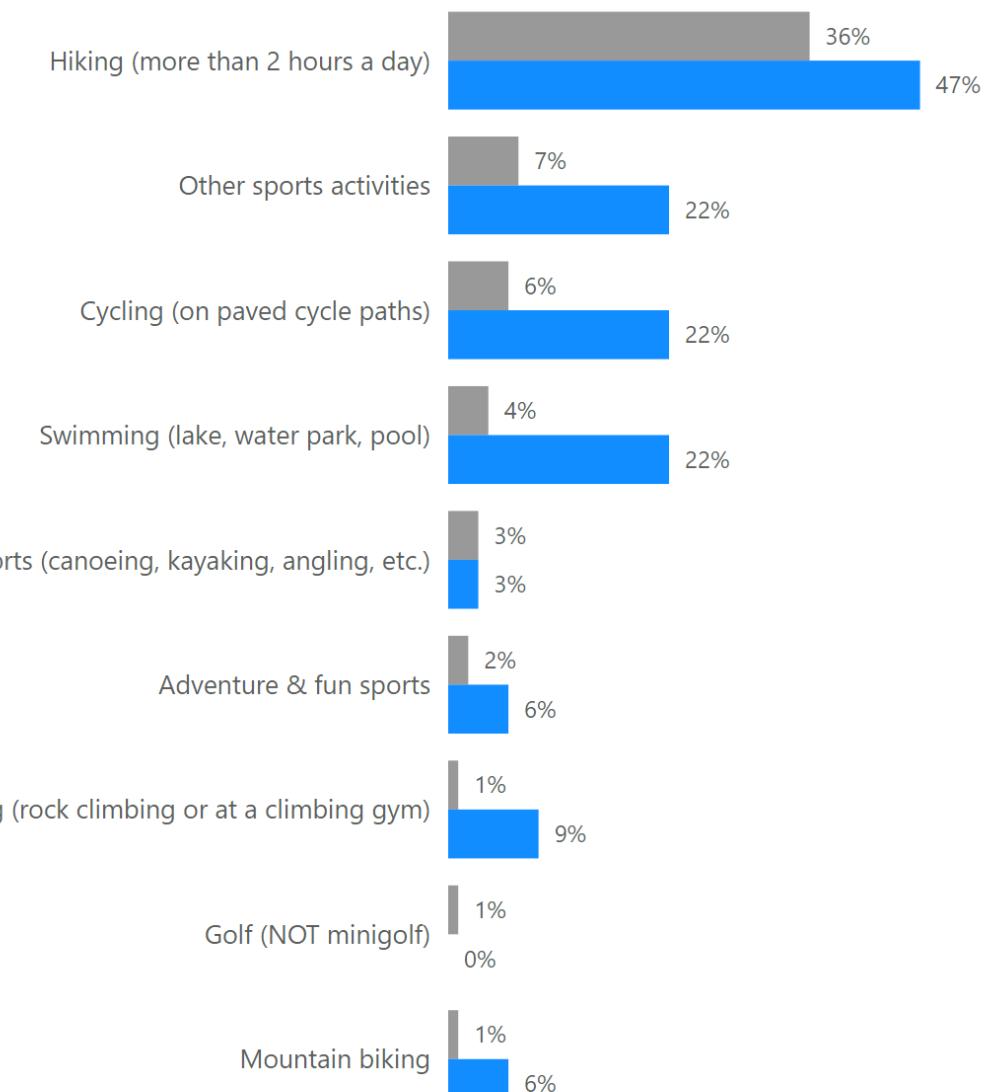
● All Inbound ● Wellness (activity)



Sporting activities

Same-day visitors

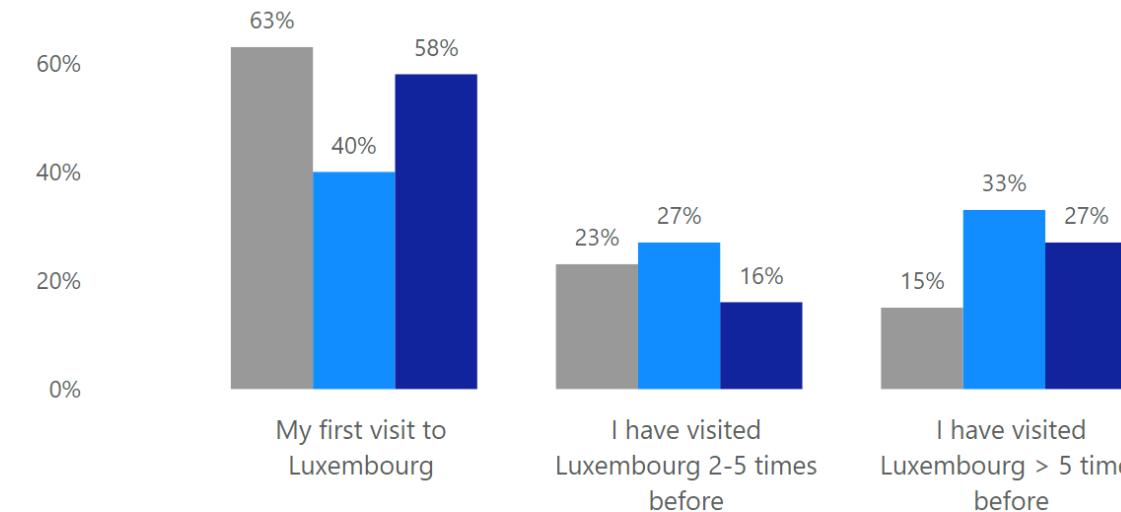
● All Inbound ● Wellness (activity)



Frequency of visit

Visitors with overnight

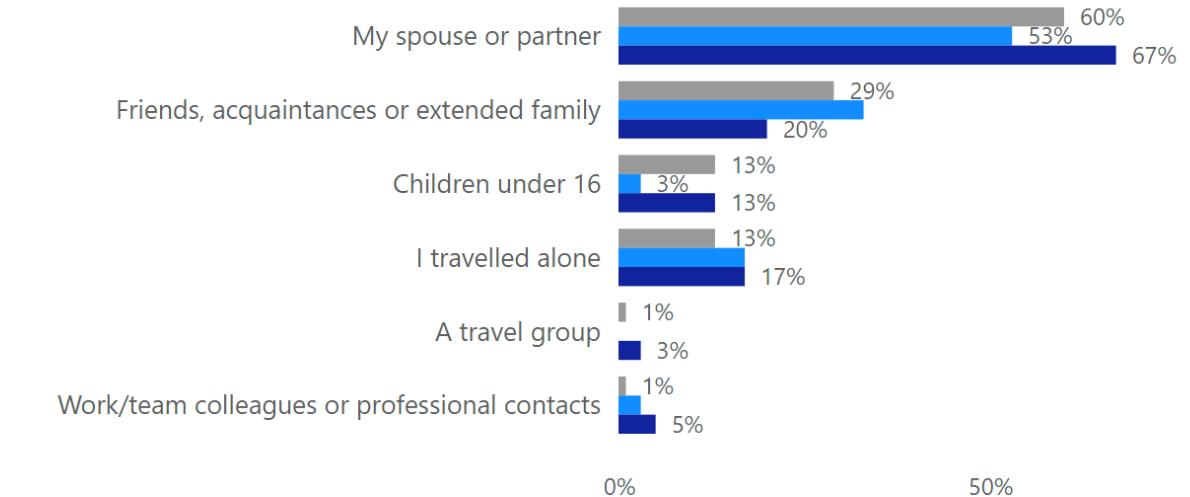
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Travel party

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



First-time visitors

Visitors with overnight

40%

Wellness & health (holiday trip)

58%

Wellness (activity)

63%

All Inbound

- Wellness-related visitors have more often visited Luxembourg more than 5 times before, comparing to all inbound visitors.
- Both groups travel a little more often alone whereas those with a wellness holiday travel more often with friends and those with a wellness activity travel more often with their spouse or partner when compared to overall visitors.

Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

43%

Wellness & health (holiday trip)

39%

Wellness (activity)

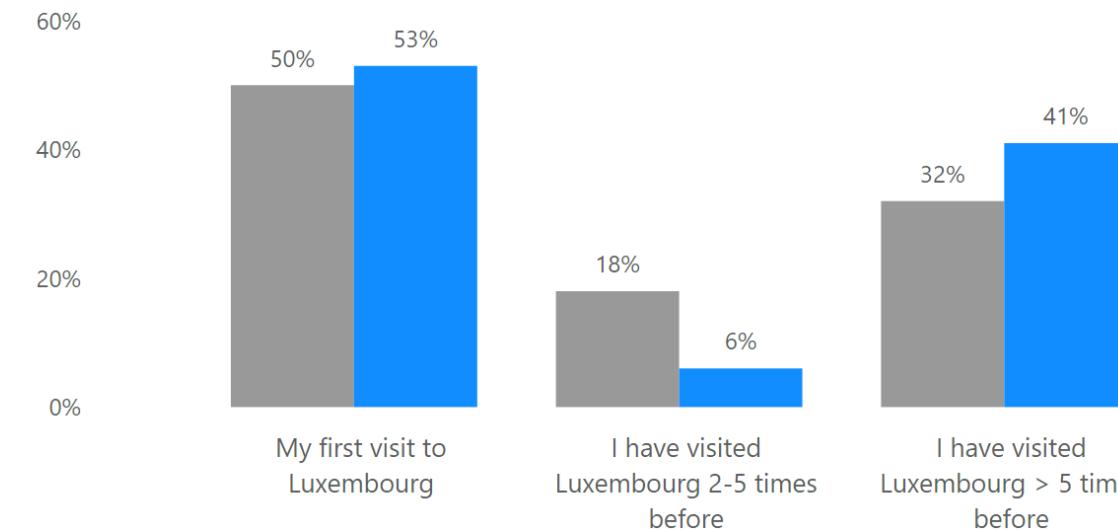
39%

All Inbound

Frequency of visit

Same-day visitors

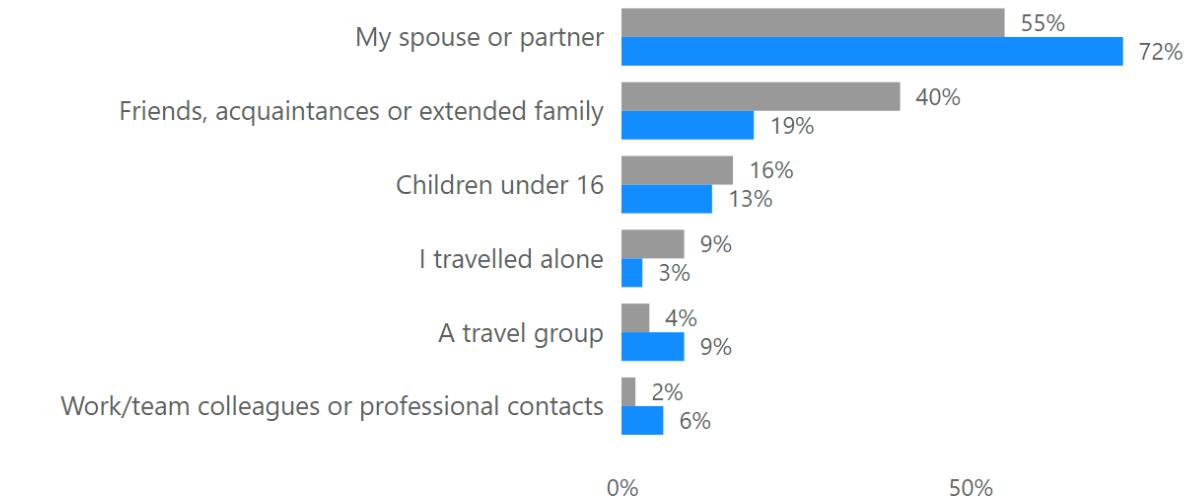
● All Inbound ● Wellness (activity)



Travel party

Same-day visitors

● All Inbound ● Wellness (activity)



First-time visitors

Same-day visitors

53%

Wellness (activity)

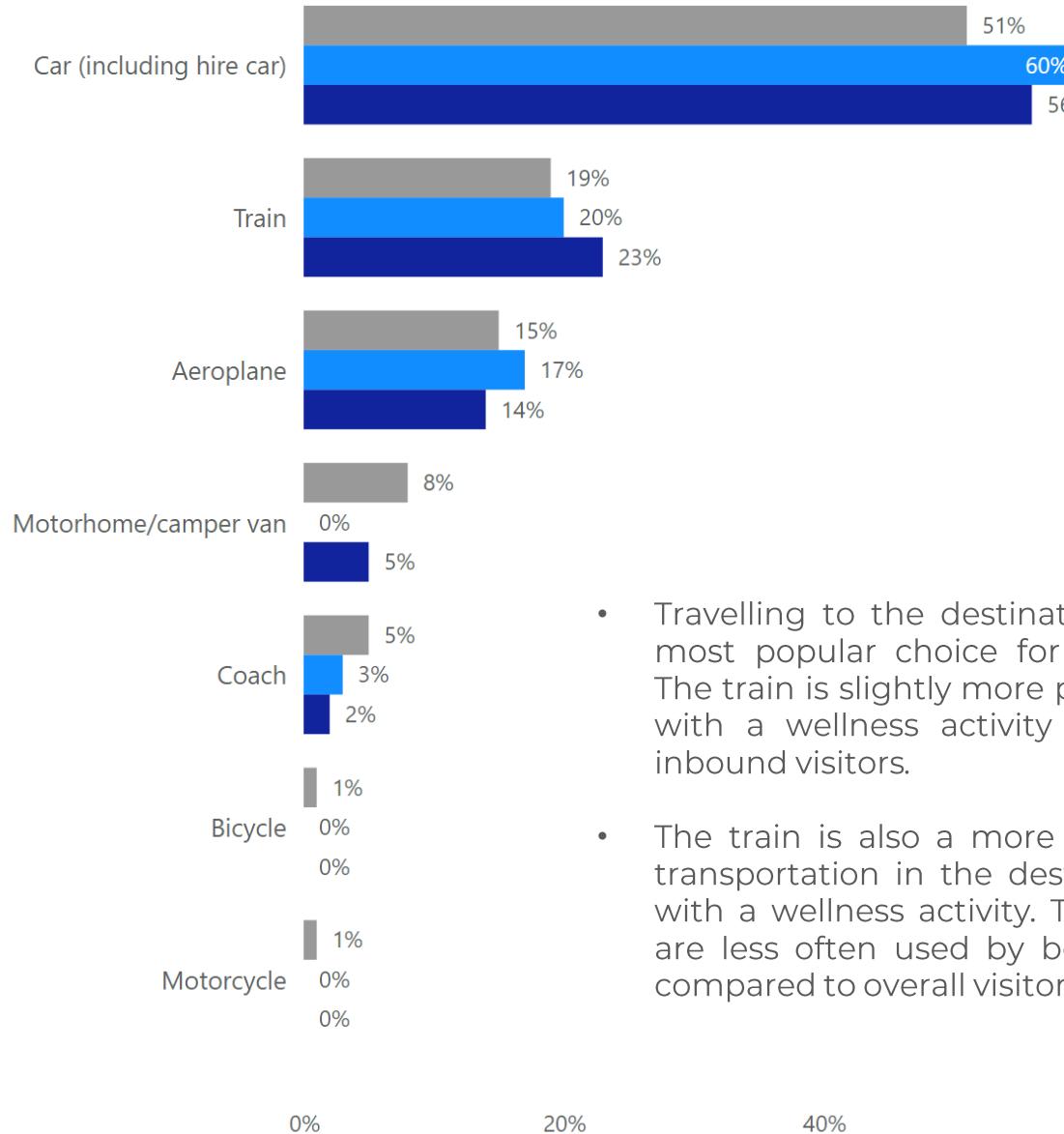
50%

All Inbound

Transport to destination

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

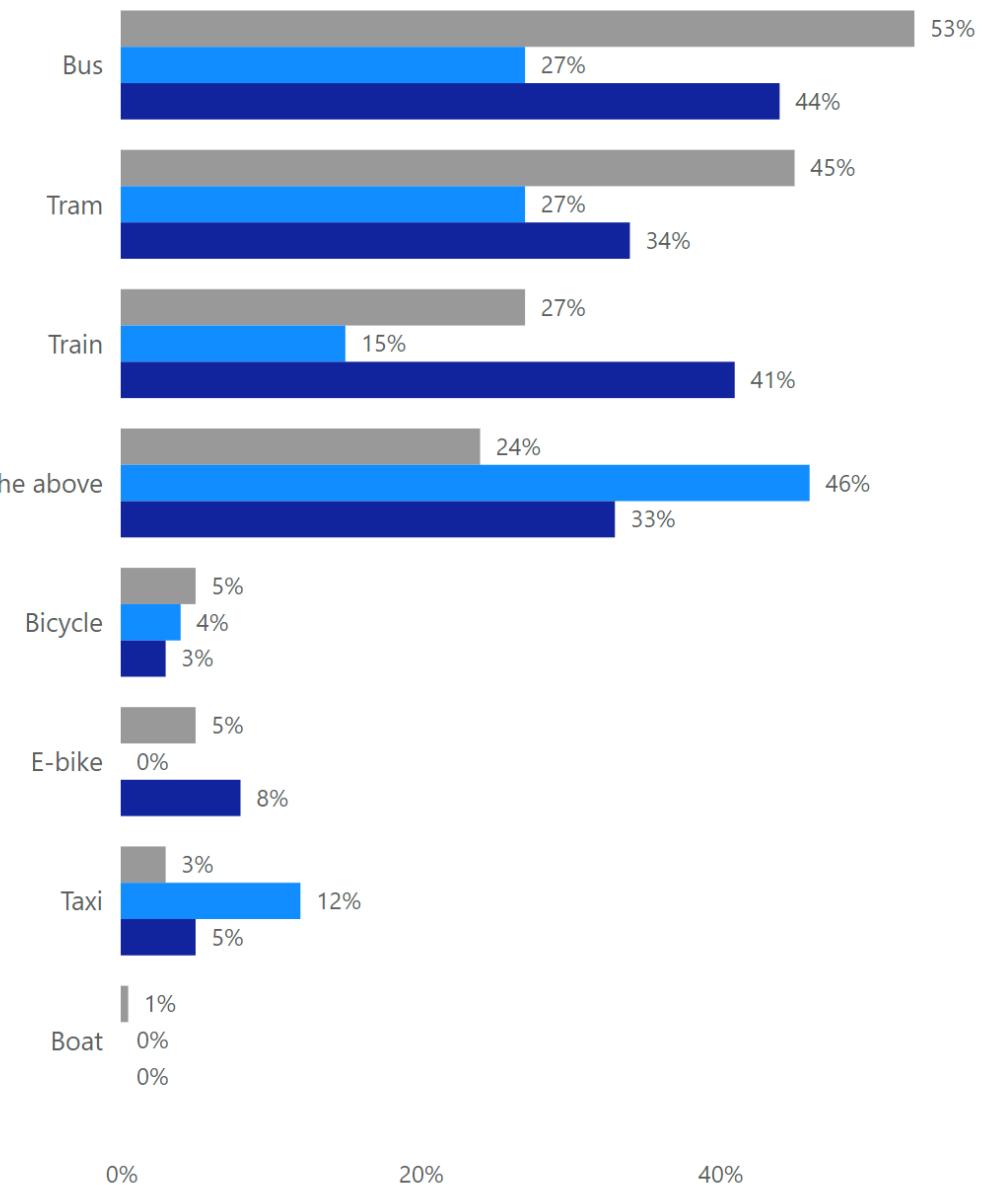


- Travelling to the destination by car is the most popular choice for wellness visitors. The train is slightly more popular for visitors with a wellness activity compared to all inbound visitors.
- The train is also a more popular mean of transportation in the destination for those with a wellness activity. The bus and tram are less often used by both groups when compared to overall visitors.

Transport in destination

Visitors with overnight

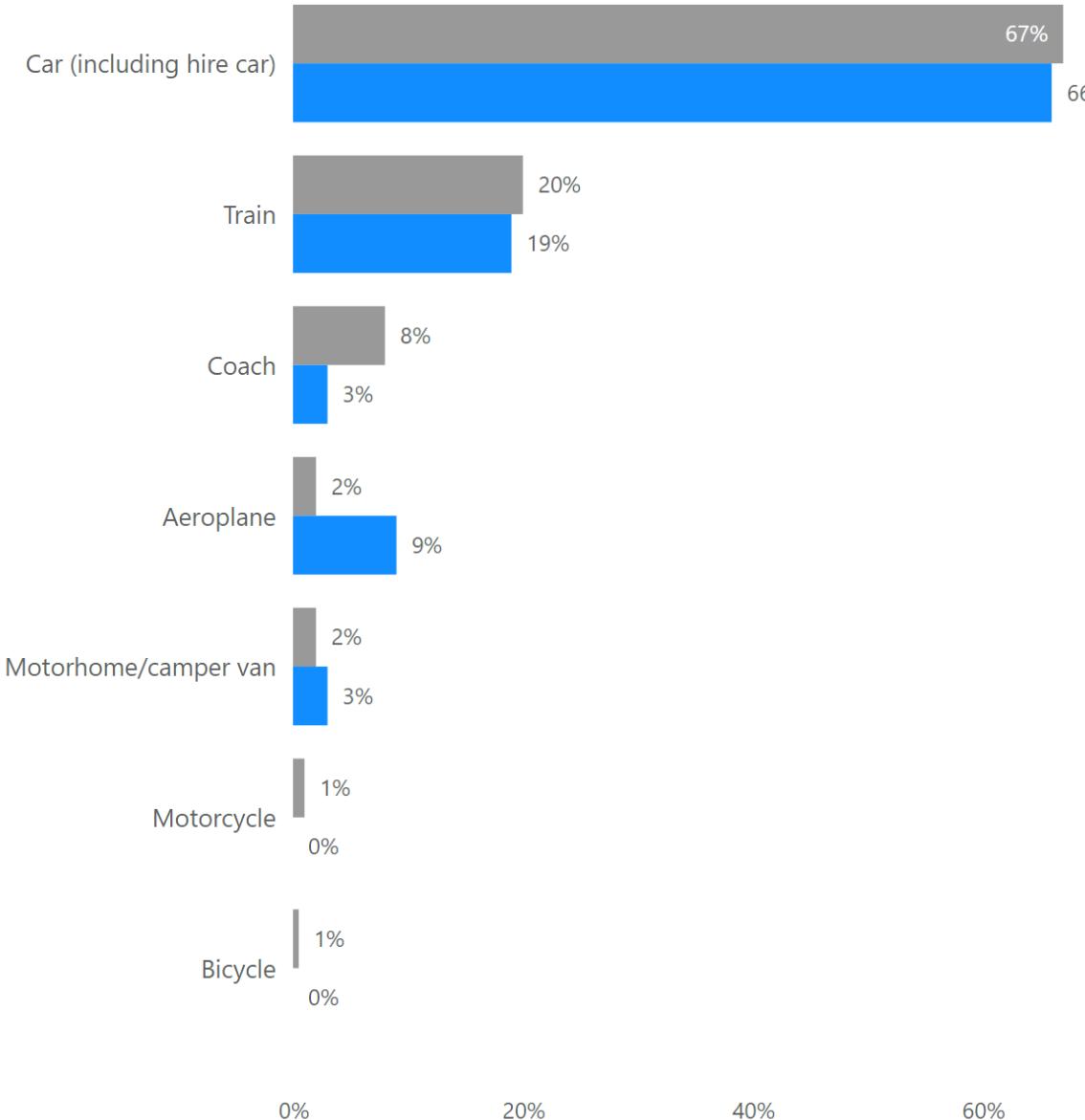
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Transport to destination

Same-day visitors

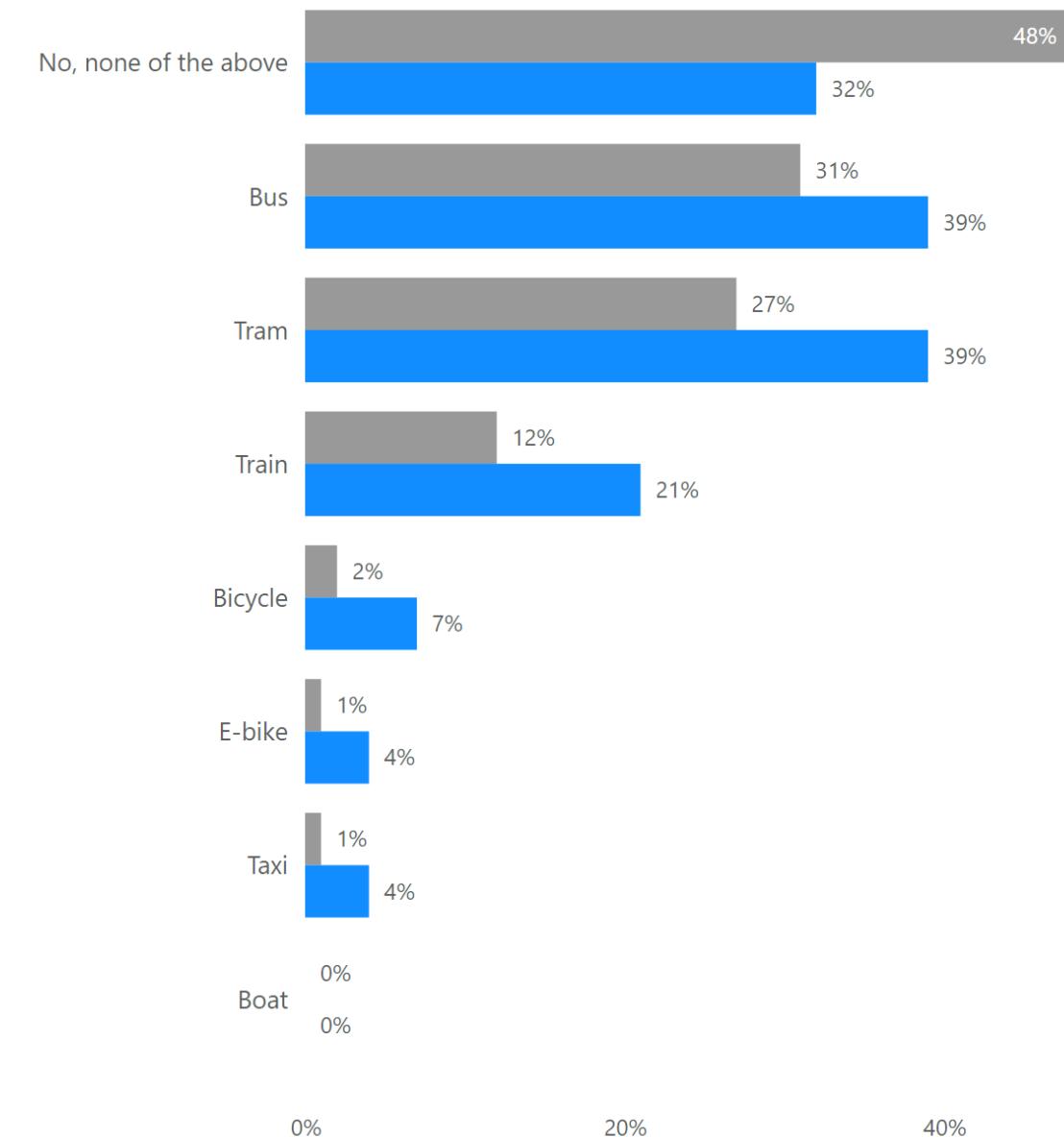
● All Inbound ● Wellness (activity)



Transport in destination

Same-day visitors

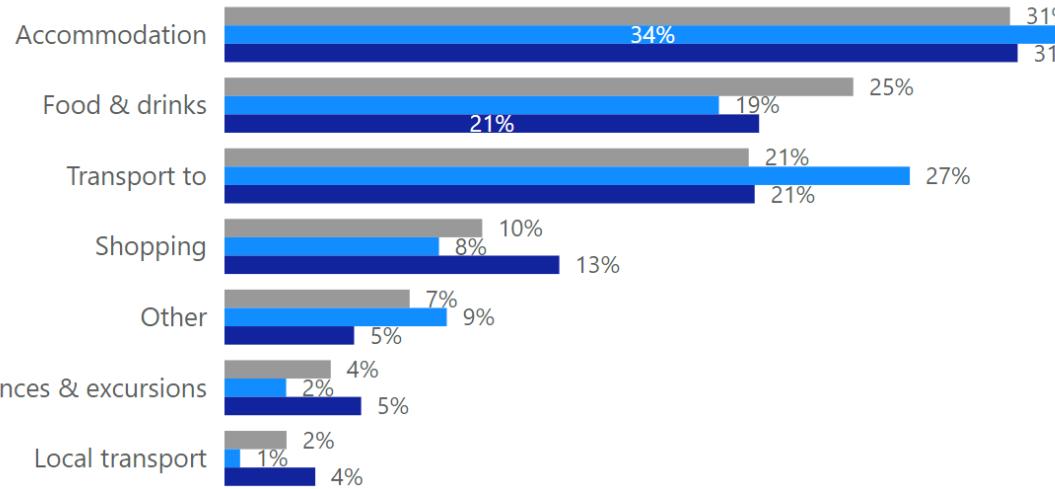
● All Inbound ● Wellness (activity)



Spending categories

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

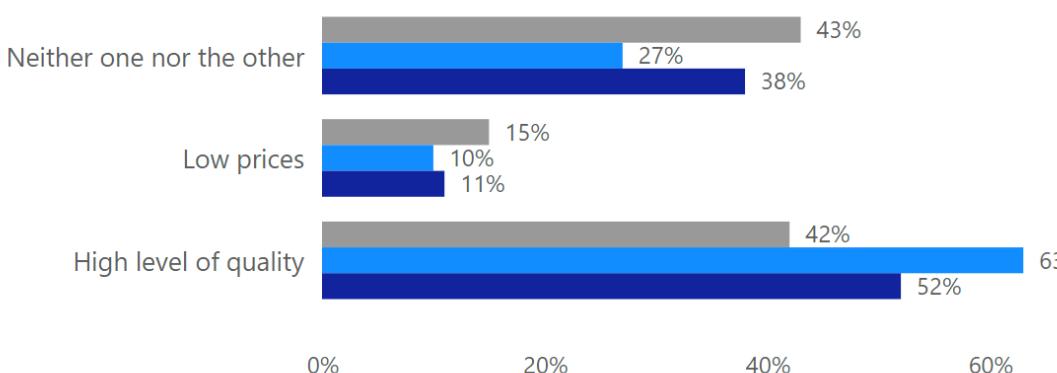


- Wellness visitors are more quality-oriented, especially those on a wellness holiday.

Quality vs. price orientation

Visitors with overnight

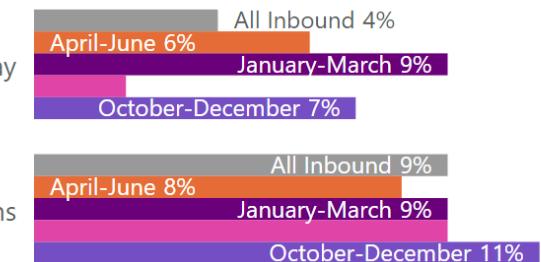
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Shares by arrival months

Visitors with overnight

Health and wellness holiday
Wellness, beauty and health institutions



- Wellness visitors tend to stay longer and spend more on their trips compared to overall visitors. Wellness holidays are the least popular from July to September whereas wellness activities are popular all year long.

Spend/pers./trip

Visitors with overnight

896 €

Wellness & health (holid...

Spend/pers./night

Visitors with overnight

222 €

Wellness & health (holid...

Length of stay (nights)

Visitors with overnight

4,0

Wellness & health (holiday trip)

910 €

Wellness (activity)

195 €

Wellness (activity)

4,7

Wellness (activity)

619 €

All Inbound

160 €

All Inbound

3,9

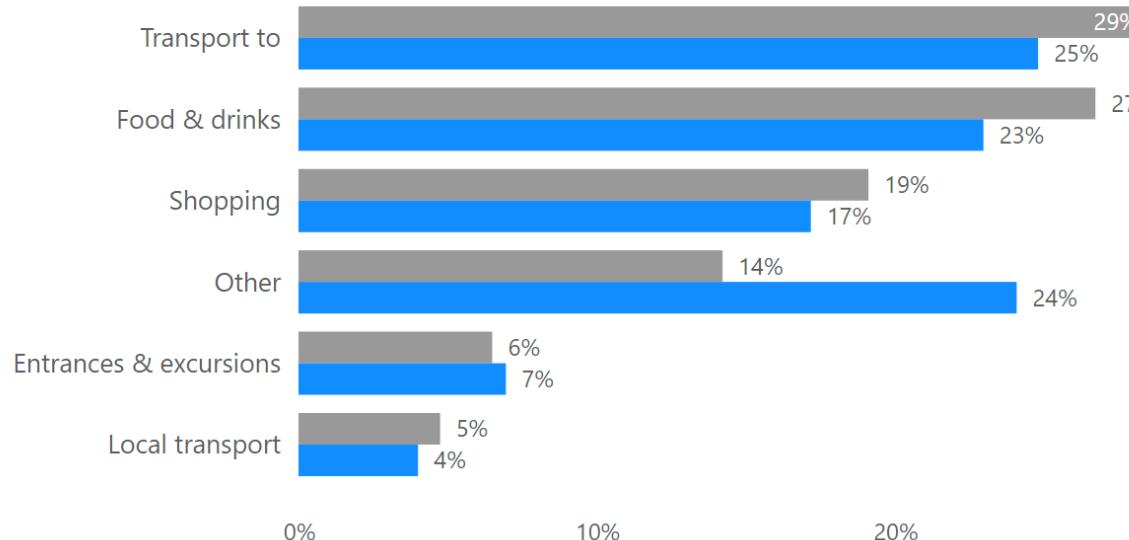
All Inbound

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

Spending categories

Same-day visitors

● All Inbound ● Wellness (activity)



Spend/pers./exc urs.

Same-day visitors

466 €

Wellness (activity)

245 €

All Inbound

Shares by arrival months

Same-day visitors

Wellness, beauty and health institutions

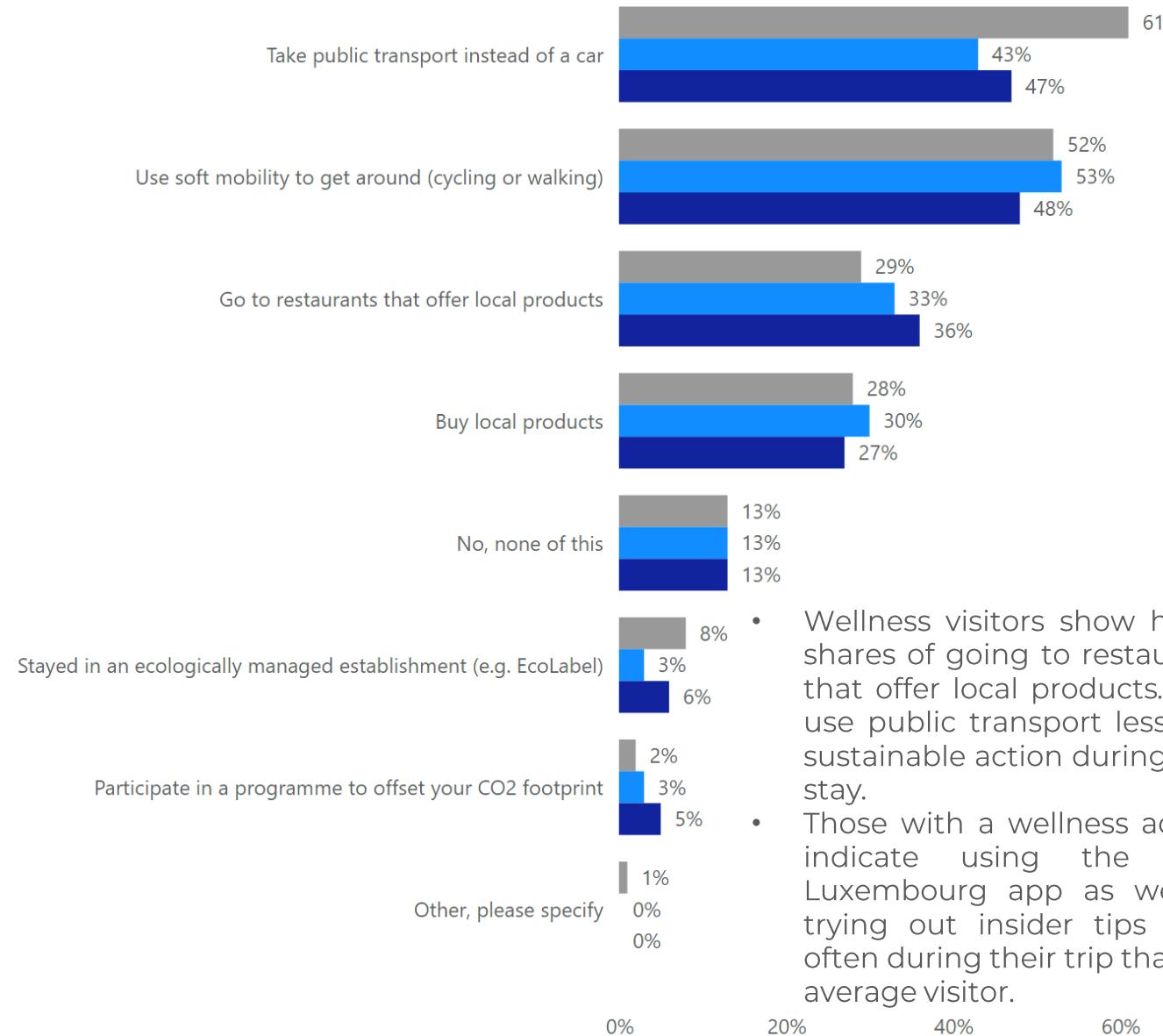


- Same-day visitors with a wellness activity also spend more on their excursion. Excursionists in October-December tend to more often engage in wellness activities than all same-day visitors, also compared to the respective shares in other months of the year.

Sustainable actions during stay

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

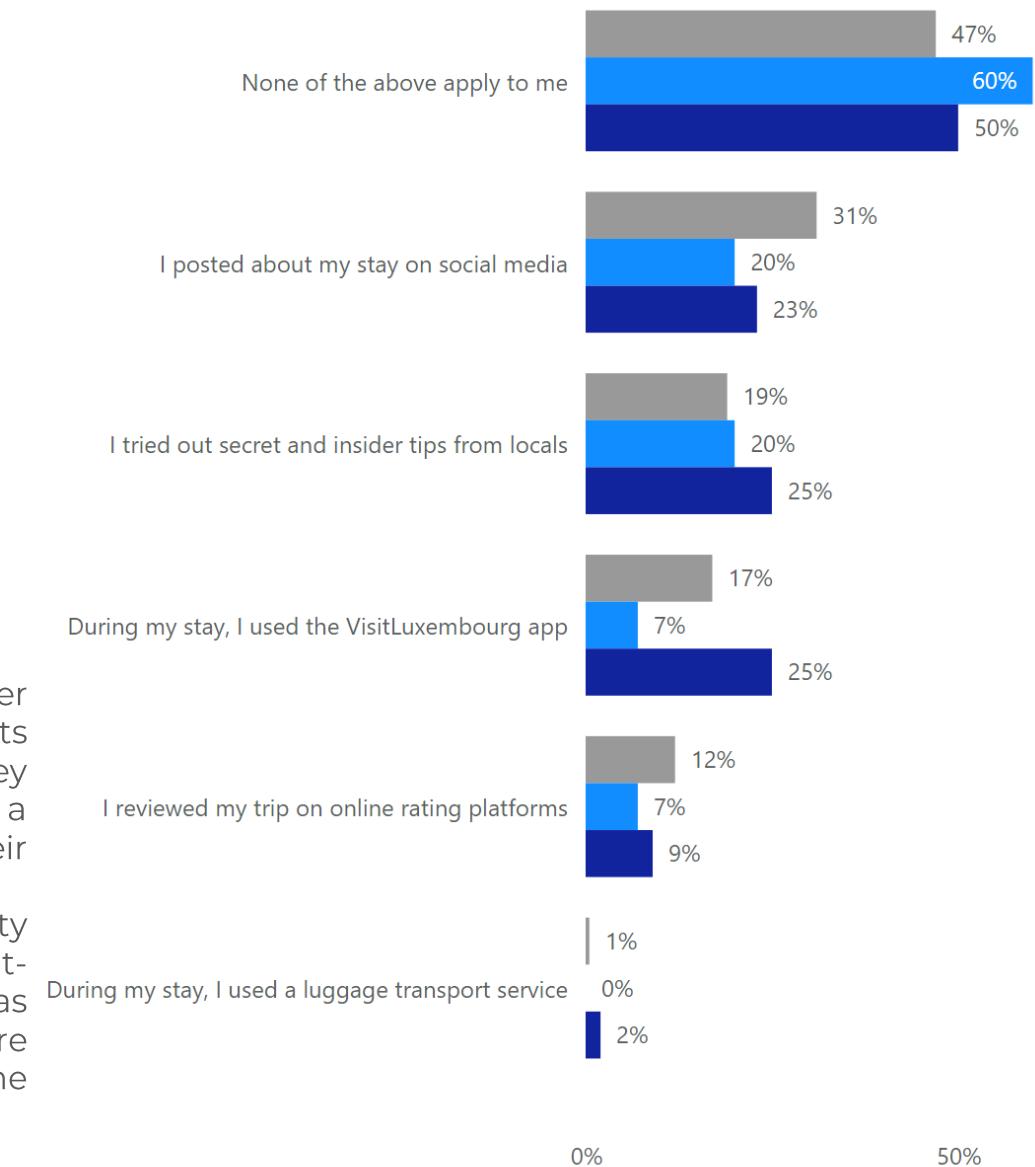


- Wellness visitors show higher shares of going to restaurants that offer local products. They use public transport less as a sustainable action during their stay.
- Those with a wellness activity indicate using the VisitLuxembourg app as well as trying out insider tips more often during their trip than the average visitor.

Services used during stay

Visitors with overnight

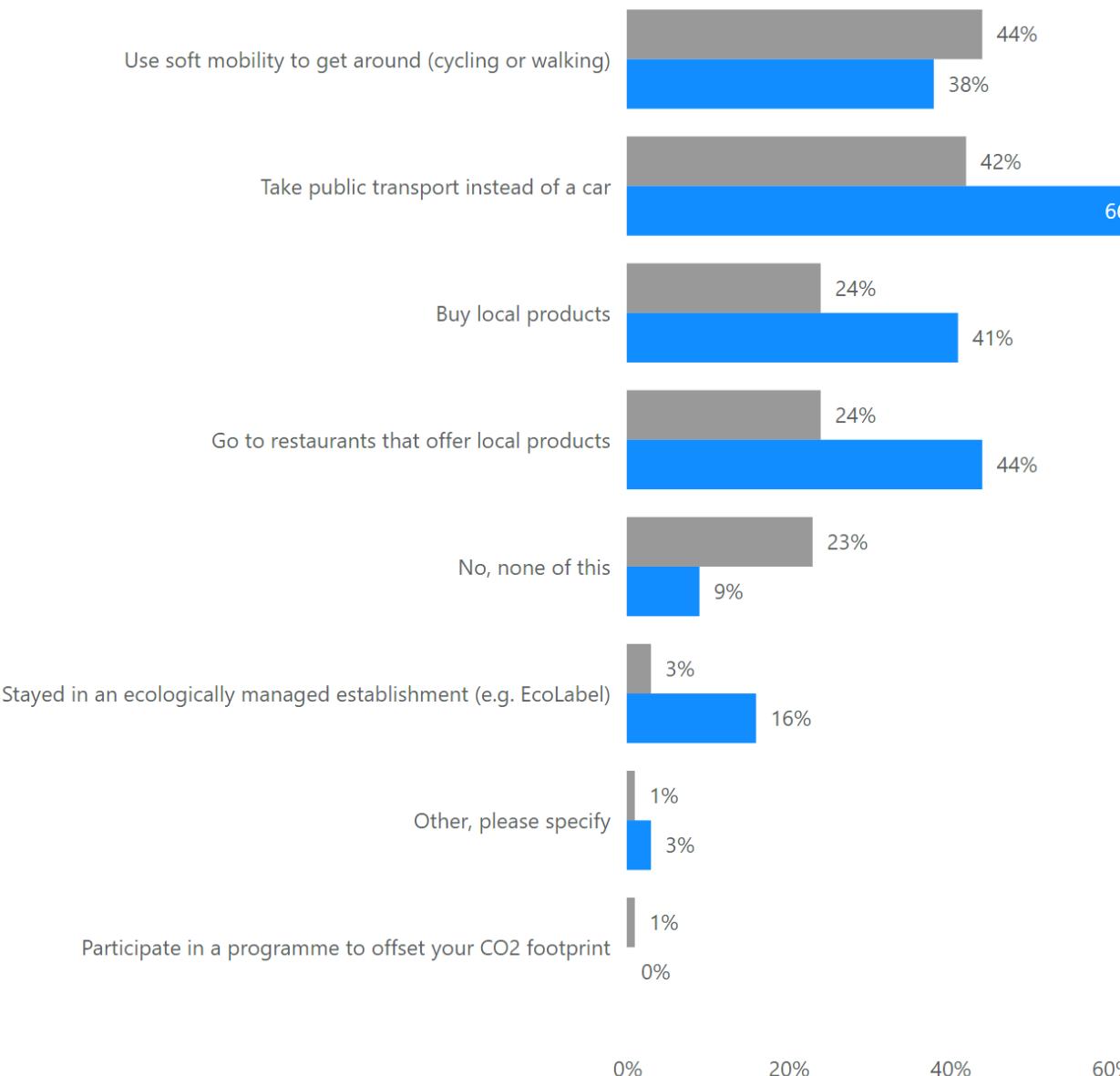
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Sustainable actions during stay

Same-day visitors

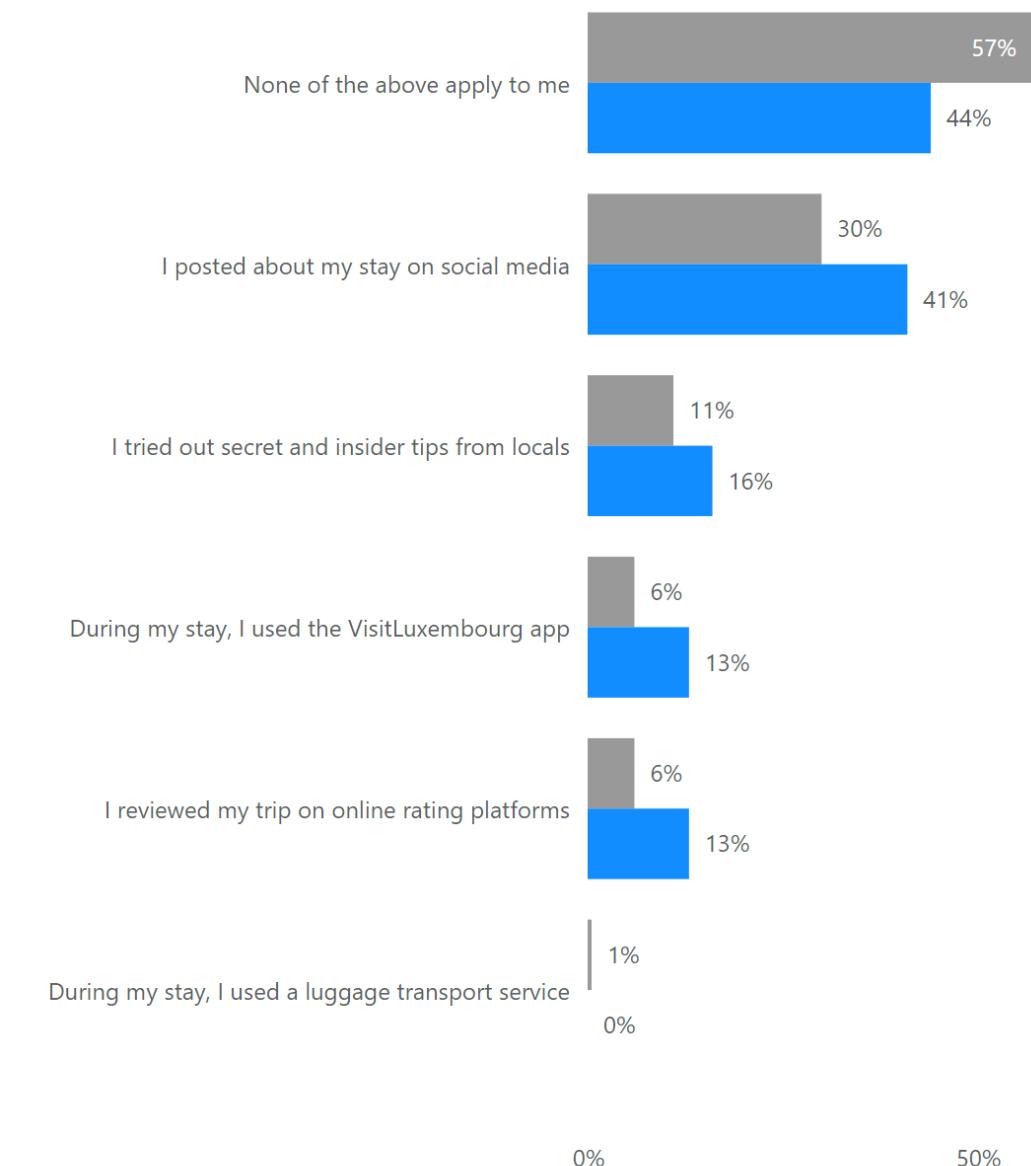
● All Inbound ● Wellness (activity)



Services used during stay

Same-day visitors

● All Inbound ● Wellness (activity)

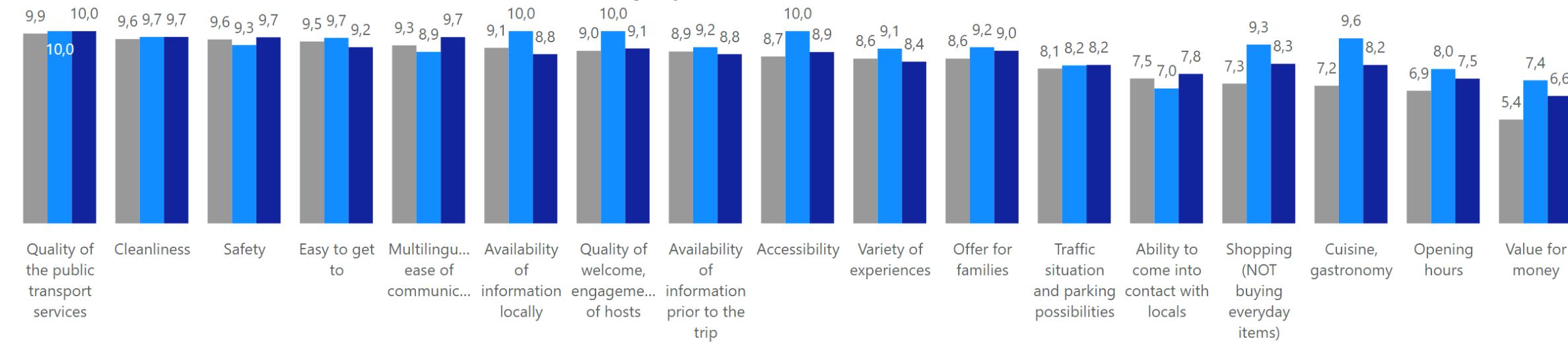


Satisfaction items

Visitors with overnight

Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

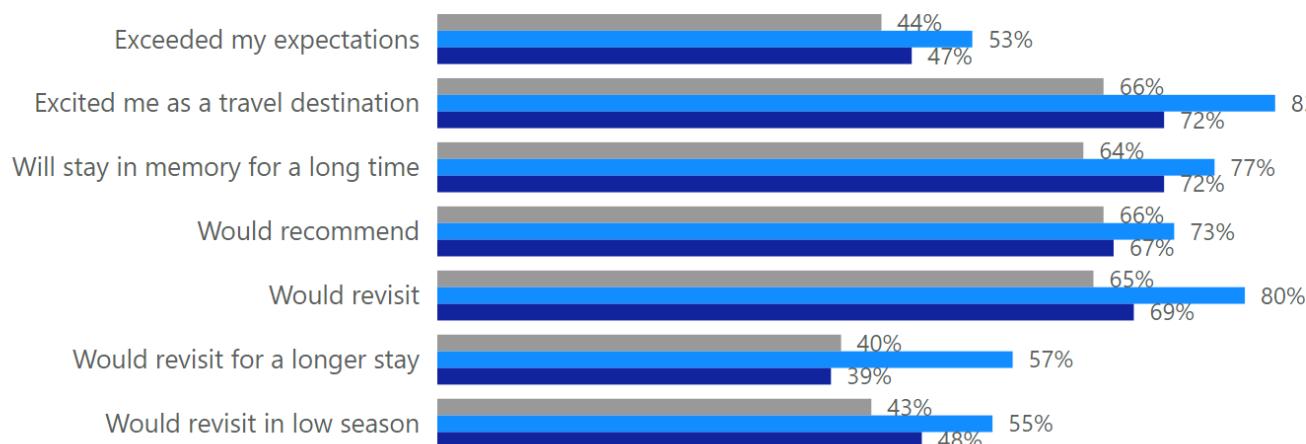
- Visitors with a wellness holiday are more satisfied with their trip than overall visitors, both for individual aspects as well as the overall satisfaction. Travellers with a wellness activity are more in line with overall visitors for most satisfaction items, although they still tend to rate them slightly better.



Overall satisfaction - % "strongly agree"

Visitors with overnight

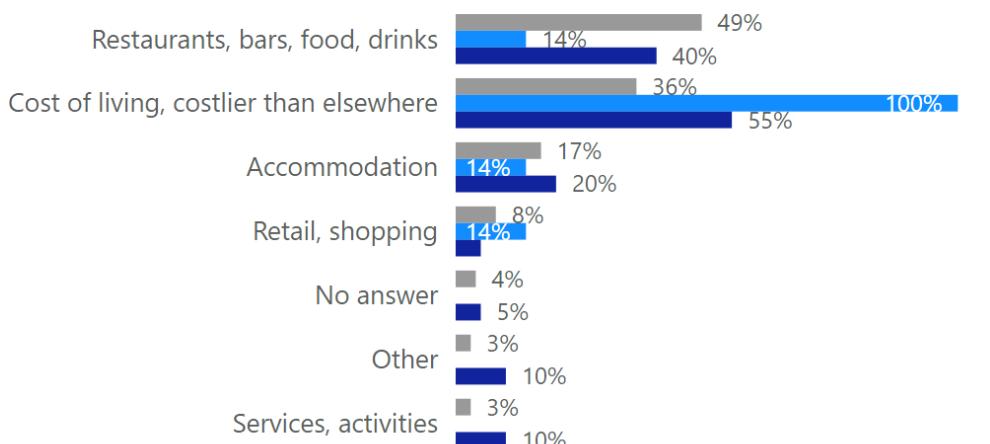
Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Reasons for poor value-for-money

Visitors with overnight

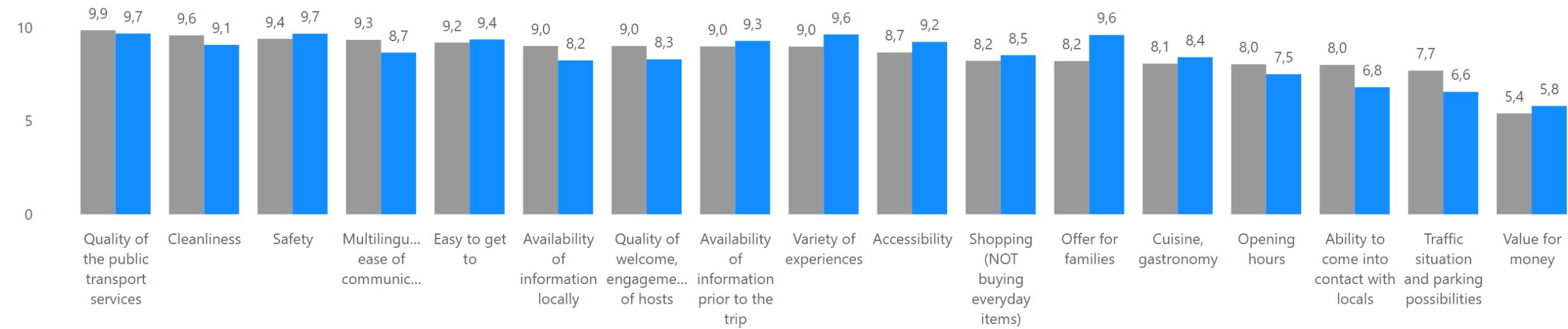
Attribut ● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Satisfaction items

Same-day visitors

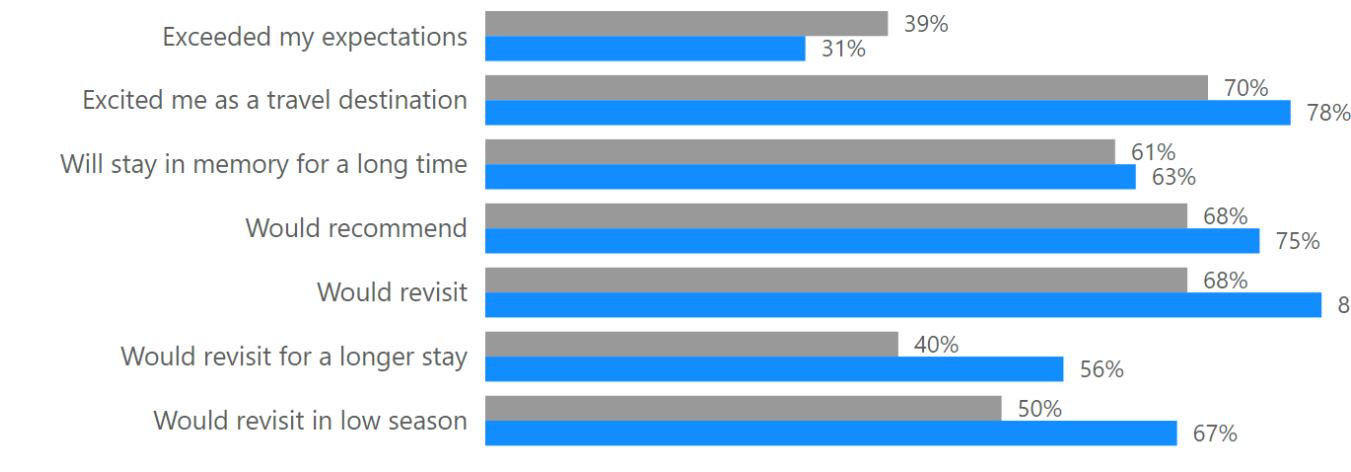
Attribut ● All Inbound ● Wellness (activity)



Overall satisfaction - % "strongly agree"

Same-day visitors

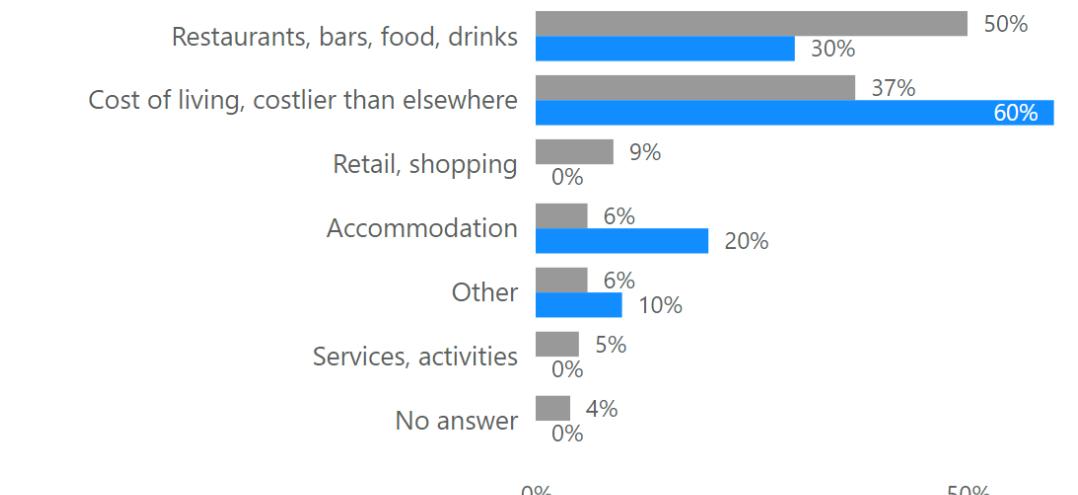
Attribut ● All Inbound ● Wellness (activity)



Reasons for poor value-for-money

Same-day visitors

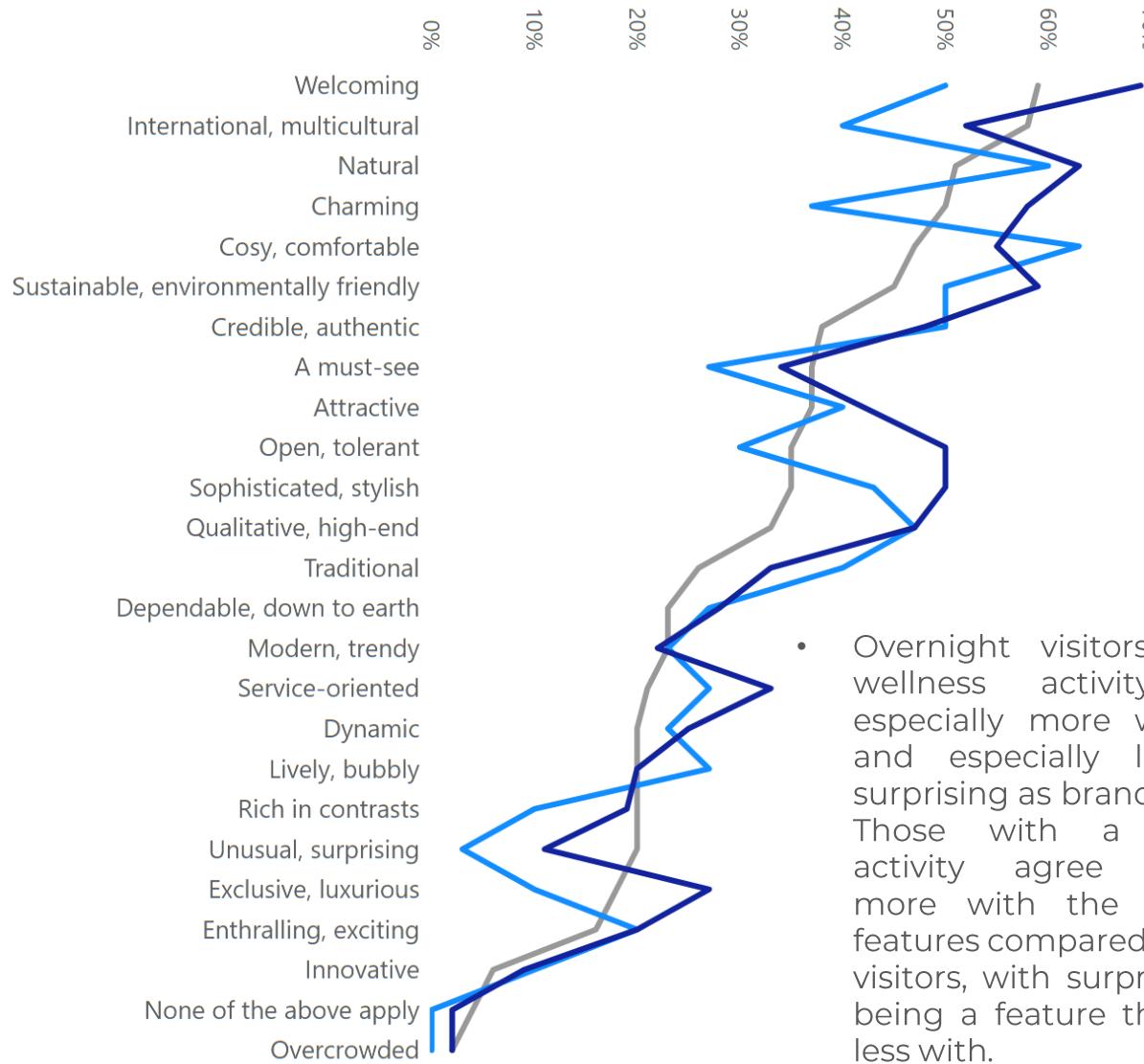
Attribut ● All Inbound ● Wellness (activity)



Brand features

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

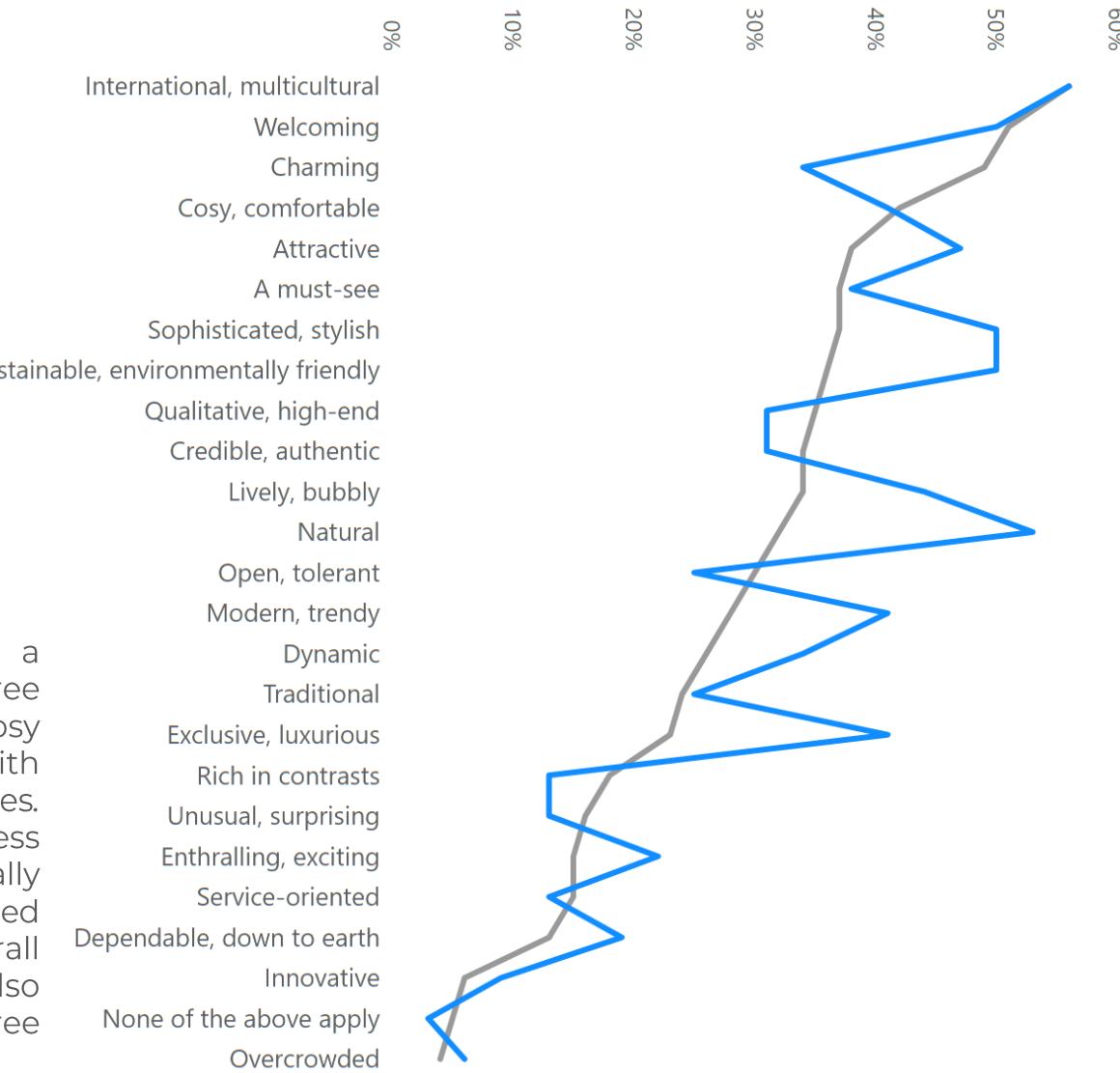


- Overnight visitors with a wellness activity agree especially more with cosy and especially less with surprising as brand features. Those with a wellness activity agree generally more with the proposed features compared to overall visitors, with surprising also being a feature they agree less with.

Brand features

Same-day visitors

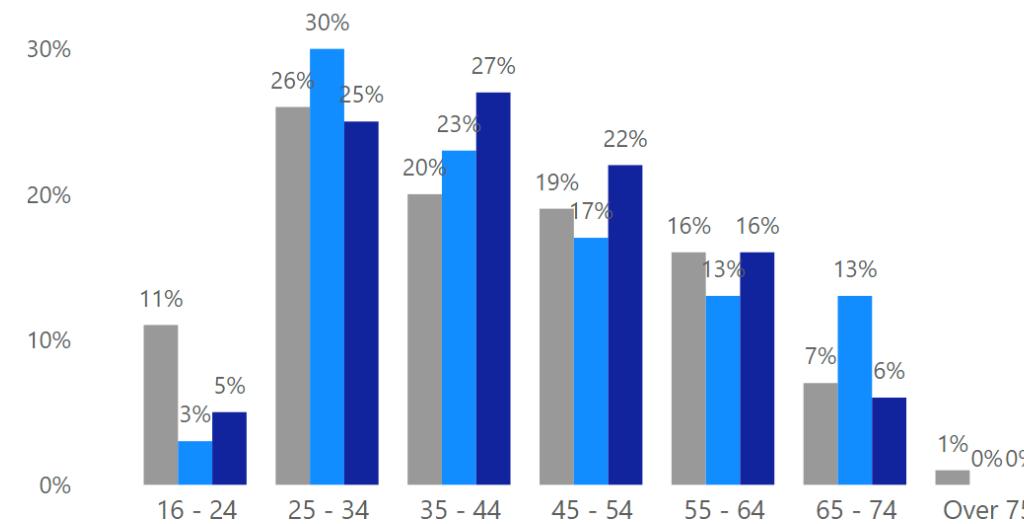
● All Inbound ● Wellness (activity)



Age

Visitors with overnight

● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)

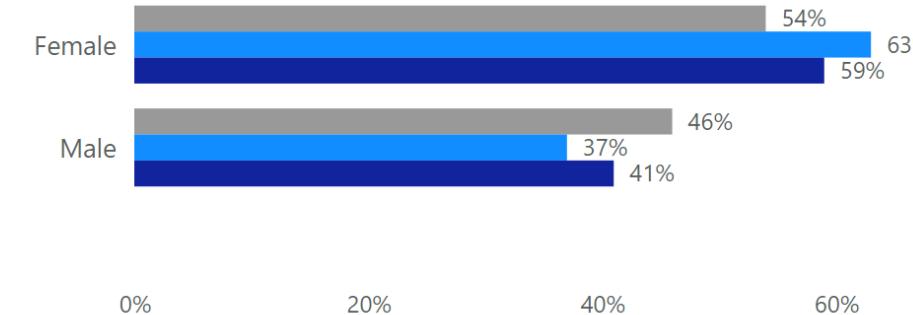


- Wellness visitors tend to be more middle-aged or older, and more often female than overall visitors.

Gender

Visitors with overnight

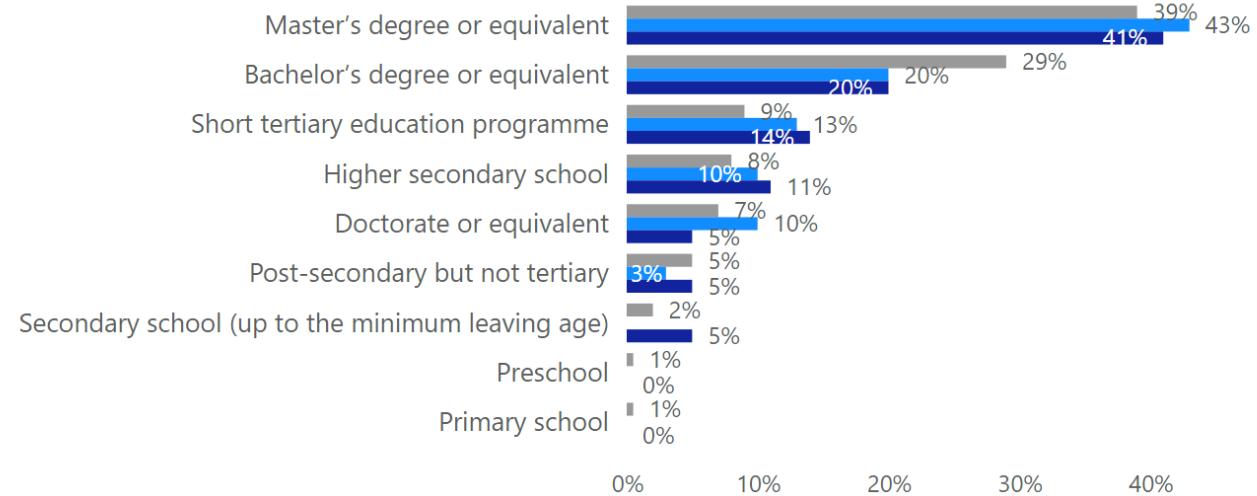
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Education

Visitors with overnight

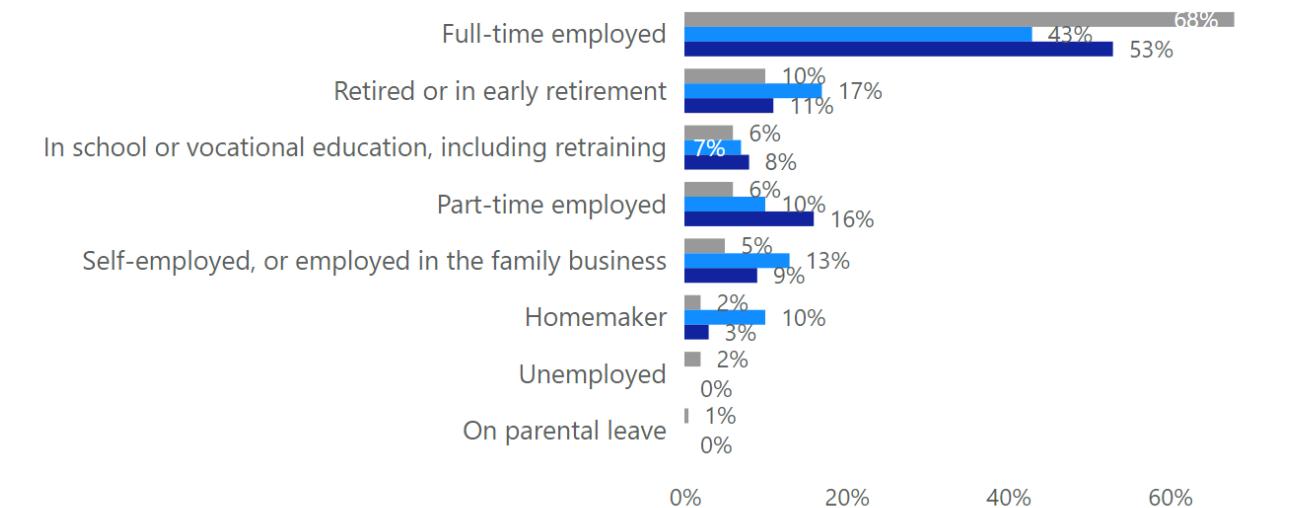
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Employment

Visitors with overnight

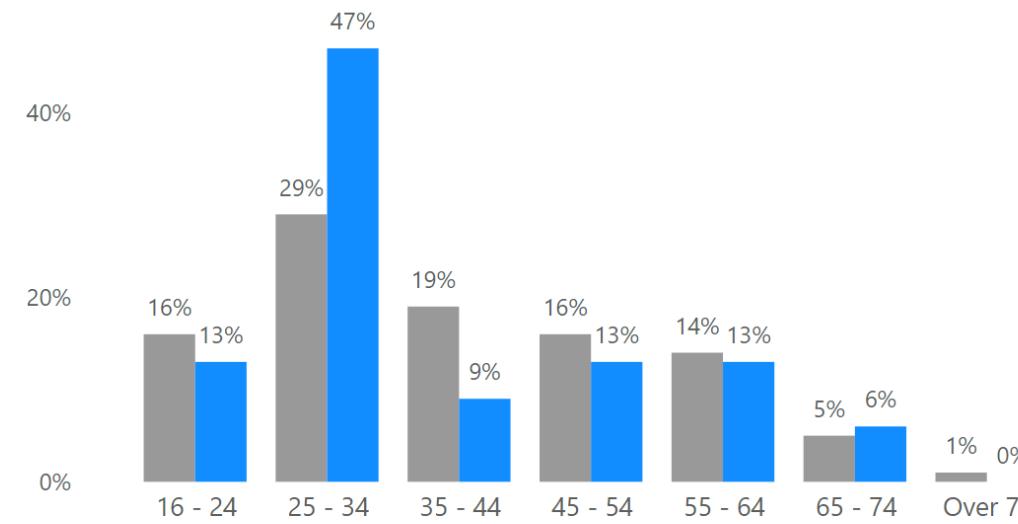
● All Inbound ● Wellness & health (holiday trip) ● Wellness (activity)



Age

Same-day visitors

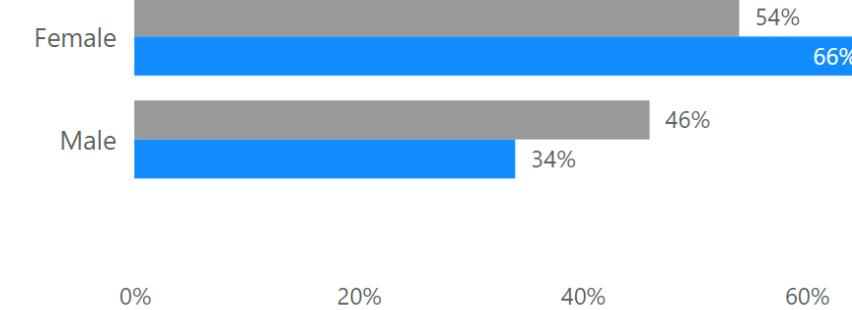
● All Inbound ● Wellness (activity)



Gender

Same-day visitors

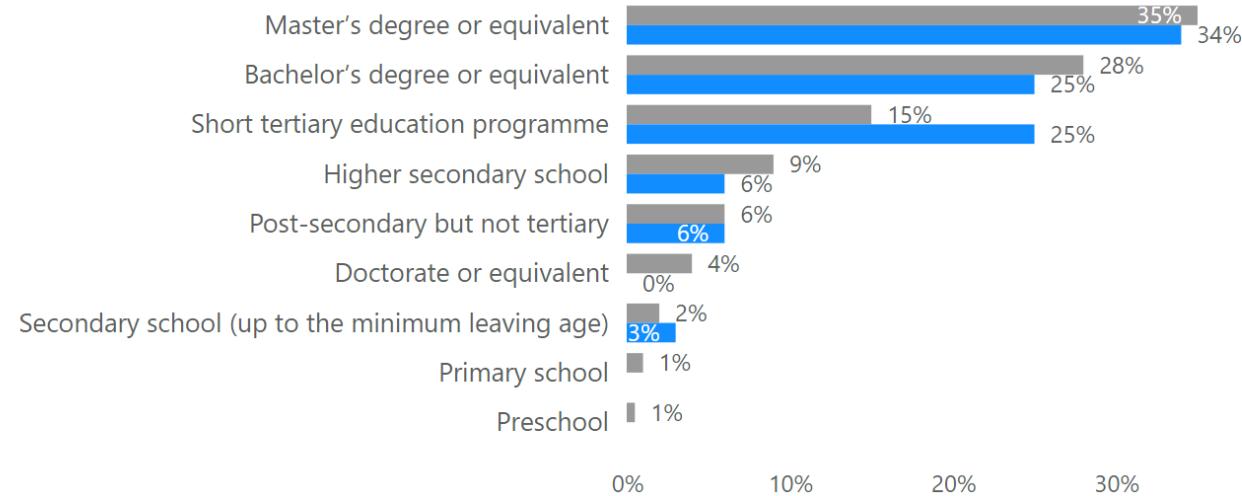
● All Inbound ● Wellness (activity)



Education

Same-day visitors

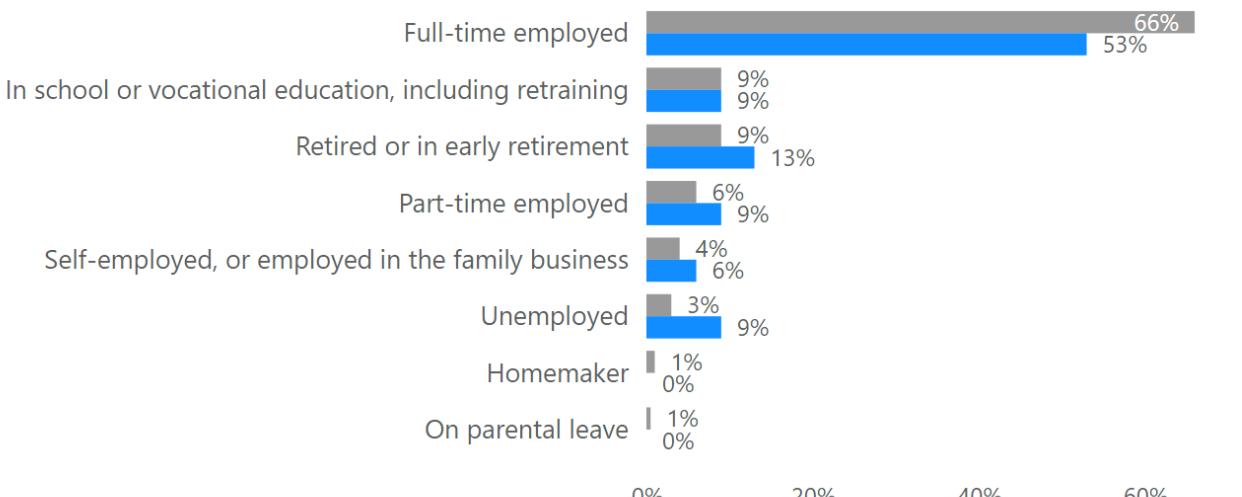
● All Inbound ● Wellness (activity)



Employment

Same-day visitors

● All Inbound ● Wellness (activity)





Destination Awareness & Growth Potential for Wellness segment



General theme interest - Wellness

| | Rank (*) | Number of themes surveyed | % „very interested“ in theme | % „interested“ in theme | % „interested“, Ø all themes | „Interested“ in theme, pop., mn (**) |
|----------------|-----------|---------------------------|------------------------------|-------------------------|------------------------------|--------------------------------------|
| Average Europe | 25 | 33 | - | 46% | 54% | - |
| | 23 | 33 | 27% | 46% | 52% | 27,6 |
| | 30 | 33 | 22% | 41% | 53% | 5,2 |
| | 23 | 33 | 26% | 49% | 54% | 3,2 |
| | 22 | 33 | 25% | 48% | 53% | 3,1 |
| | 28 | 33 | 18% | 38% | 51% | 3,1 |
| | 27 | 33 | 21% | 44% | 55% | 20,7 |
| | 28 | 33 | 19% | 40% | 53% | 19,4 |
| | 28 | 38 | 22% | 47% | 57% | 20,0 |
| | 30 | 38 | 21% | 44% | 57% | 15,3 |
| | 20 | 21 | - | 32% | 47% | 9,0 |
| | 16 | 24 | 23% | 52% | 54% | 1,8 |
| | 13 | 24 | 24% | 51% | 51% | 2,1 |
| | 18 | 24 | 14% | 44% | 52% | 3,2 |
| | 6 | 24 | 55% | 73% | 60% | 5,5 |

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 - Wellness



| | Rank (*) | Number of themes surveyed | % „Luxembourg very suitable“ | % „Lux. very suitable“, Ø all themes | „Luxembourg very suitable“, pop., mn (**) |
|----------------|-----------|---------------------------|------------------------------|--------------------------------------|---|
| Average Europe | 16 | 26 | 20% | 24% | - |
| | 19 | 26 | 17% | 23% | 10,4 |
| | 22 | 26 | 15% | 26% | 2,0 |
| | 17 | 26 | 17% | 22% | 1,1 |
| | 19 | 26 | 18% | 23% | 1,2 |
| | 22 | 26 | 16% | 25% | 1,3 |
| | 17 | 26 | 17% | 22% | 8,0 |
| | 18 | 26 | 16% | 22% | 7,8 |
| | 19 | 31 | 20% | 23% | 8,7 |
| | 24 | 31 | 19% | 26% | 6,6 |
| | 12 | 20 | 25% | 27% | 0,9 |
| | 12 | 20 | 21% | 24% | 0,9 |
| | 14 | 20 | 16% | 21% | 1,1 |
| | 5 | 20 | 42% | 33% | 3,2 |

- Except for Portugal, theme interest is ranked rather low for the listed source markets (see previous slides). It is nevertheless also a bit higher in the German-speaking countries.

- Luxembourg's perceived suitability for this theme is ranked better (though still in the lower half) than the general interest across most countries.

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

Wellness



(Ø 13 European source markets) - LFT target segments

| | „Interested in theme“, Rank | Number of themes surveyed | „Luxembourg very suitable“, Rank | Number of themes surveyed |
|-----|-----------------------------|---------------------------|----------------------------------|---------------------------|
| EXP | 23 | 26 | 18 | 26 |
| NLA | 18 | 26 | 18 | 26 |
| RS | 17 | 26 | 14 | 26 |
| SB | 18 | 26 | 16 | 26 |
| PS | 18 | 26 | 18 | 26 |
| LO | 18 | 26 | 18 | 26 |

- Interest for wellness and perceived suitability of Luxembourg for wellness are ranked highest among Relaxation Seekers. While showing lower general interest for wellness, Explorers' perception of Luxembourg's theme suitability for this theme is in line with that by other target segments.



Trip organisation and preferences of Wellness travellers

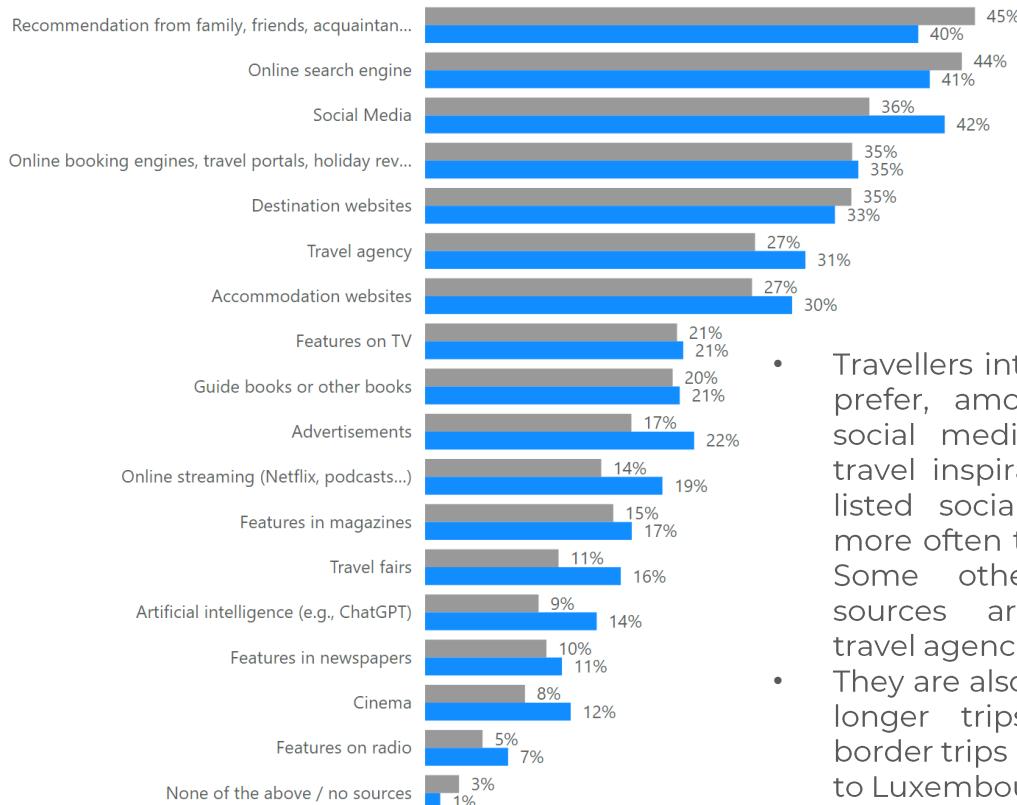


Trip organisation and preferences (1)

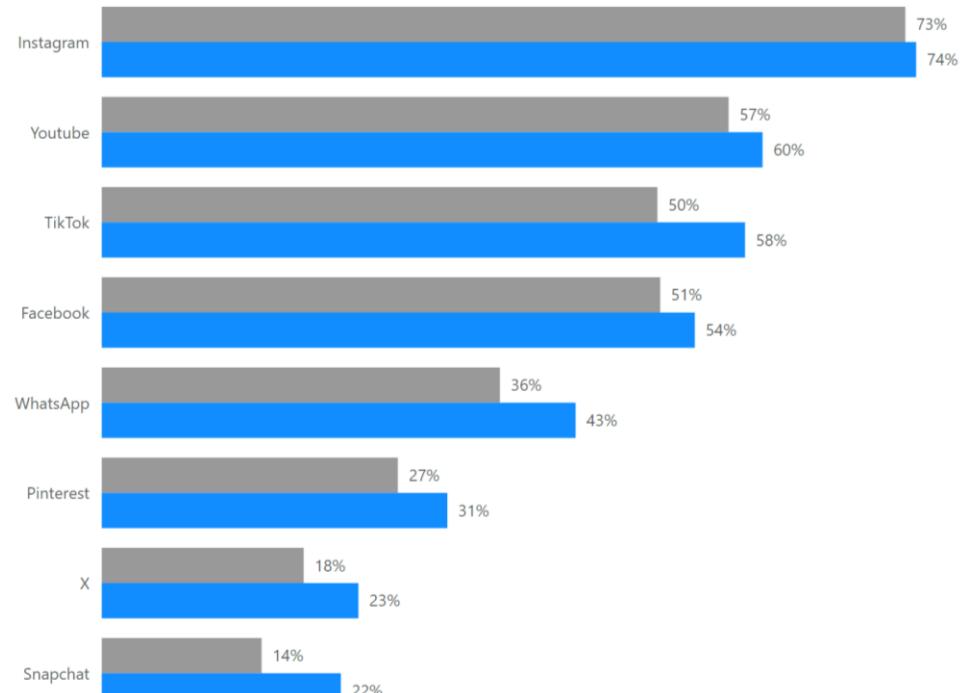
— Average European source markets, total vs. travellers interested in wellness

Preferred sources of travel inspiration

● Total
● Wellness (interest)



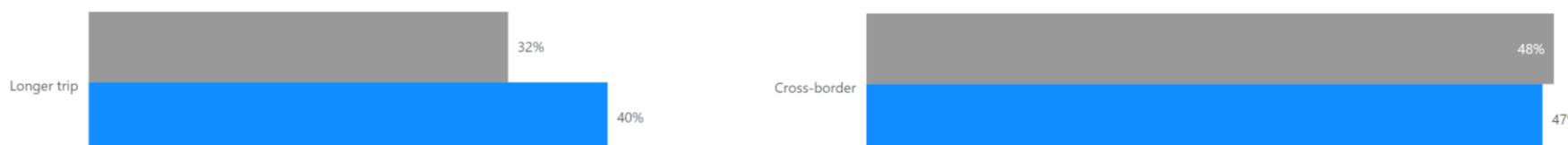
- Travellers interested in wellness prefer, among other sources, social media as a source of travel inspiration, using all the listed social media platforms more often than overall visitors. Some other more popular sources are advertisements, travel agencies and travel fairs.
- They are also more interested in longer trips but not cross-border trips if considering a visit to Luxembourg.



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

● Total

● Wellness (interest)

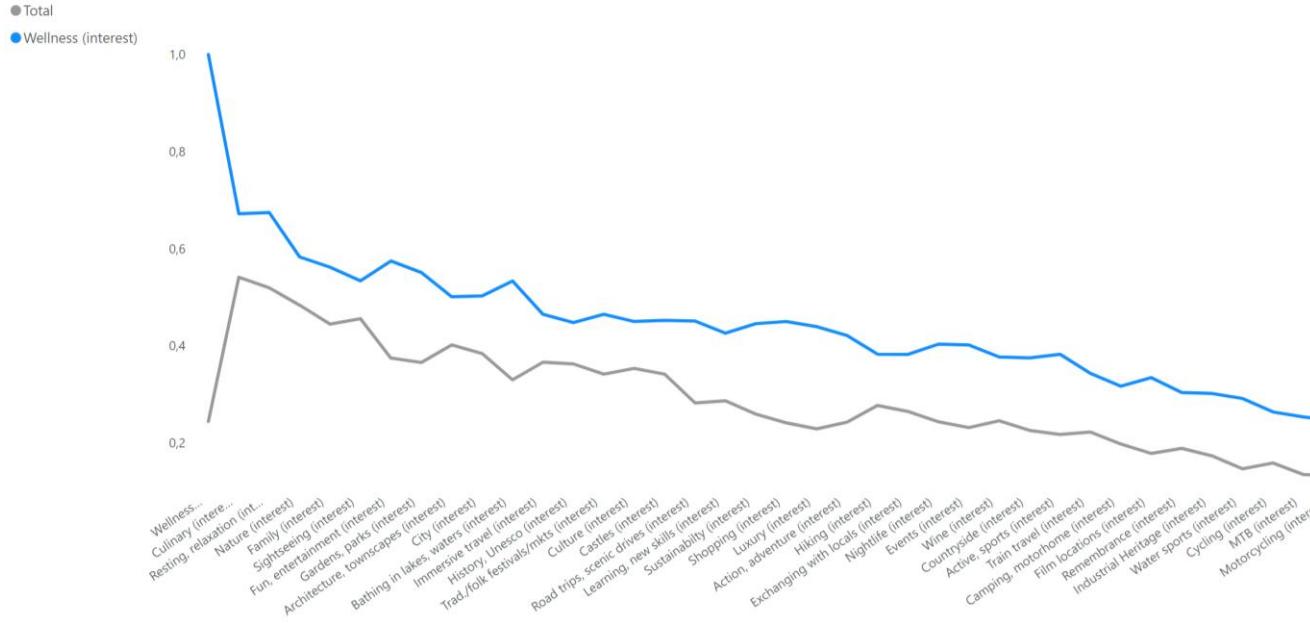


Trip organisation and preferences (2)

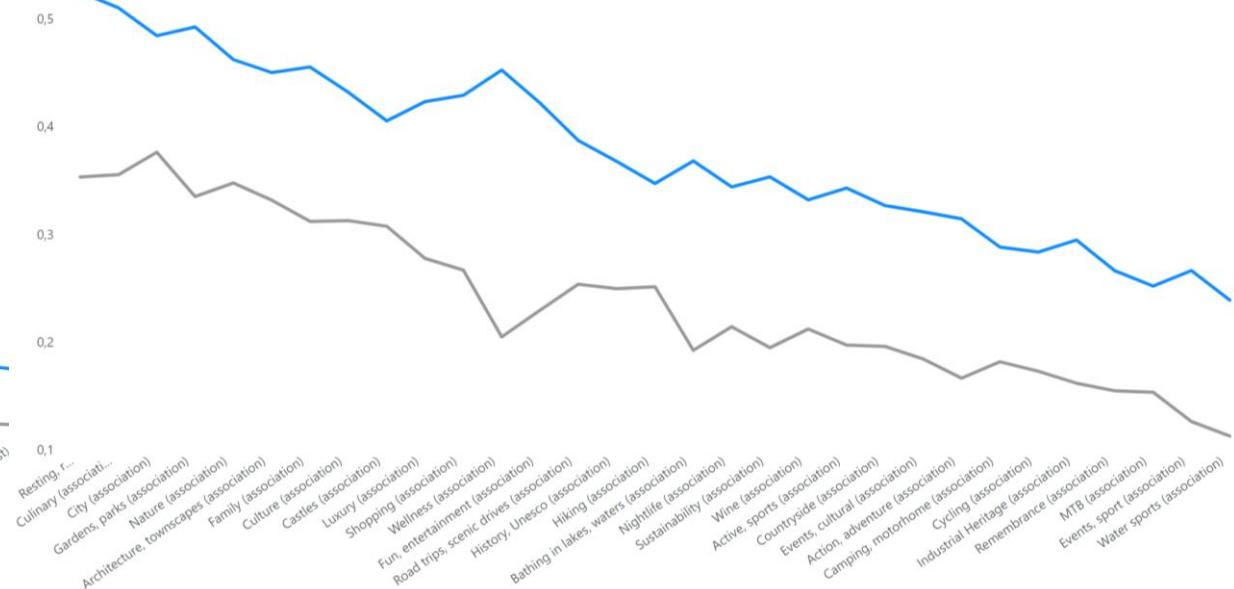
— Average **European source markets**, total vs. travellers interested in wellness



General theme interest (when going on a holiday)



Luxembourg's perceived theme suitability



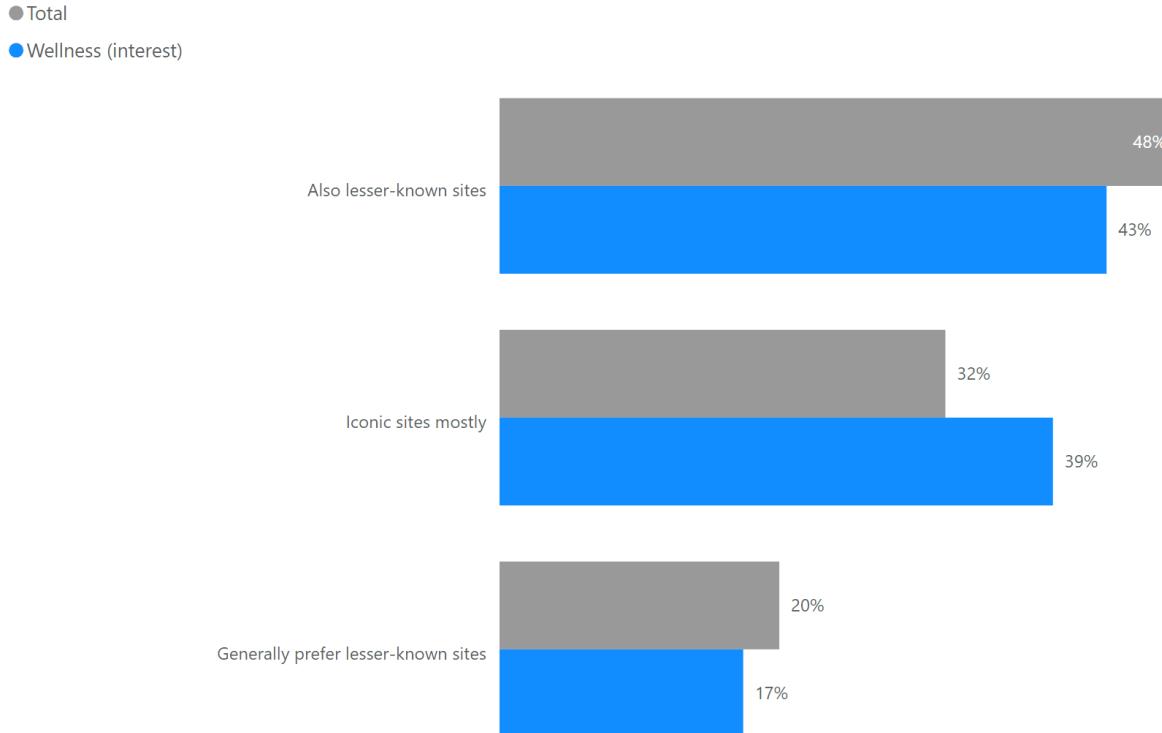
- Wellness-interested travellers show a higher theme interested and perceive Luxembourg's theme suitability better for all listed categories compared to overall travellers. Additionally, in comparison, they perceive Luxembourg's competence for wellness especially good.



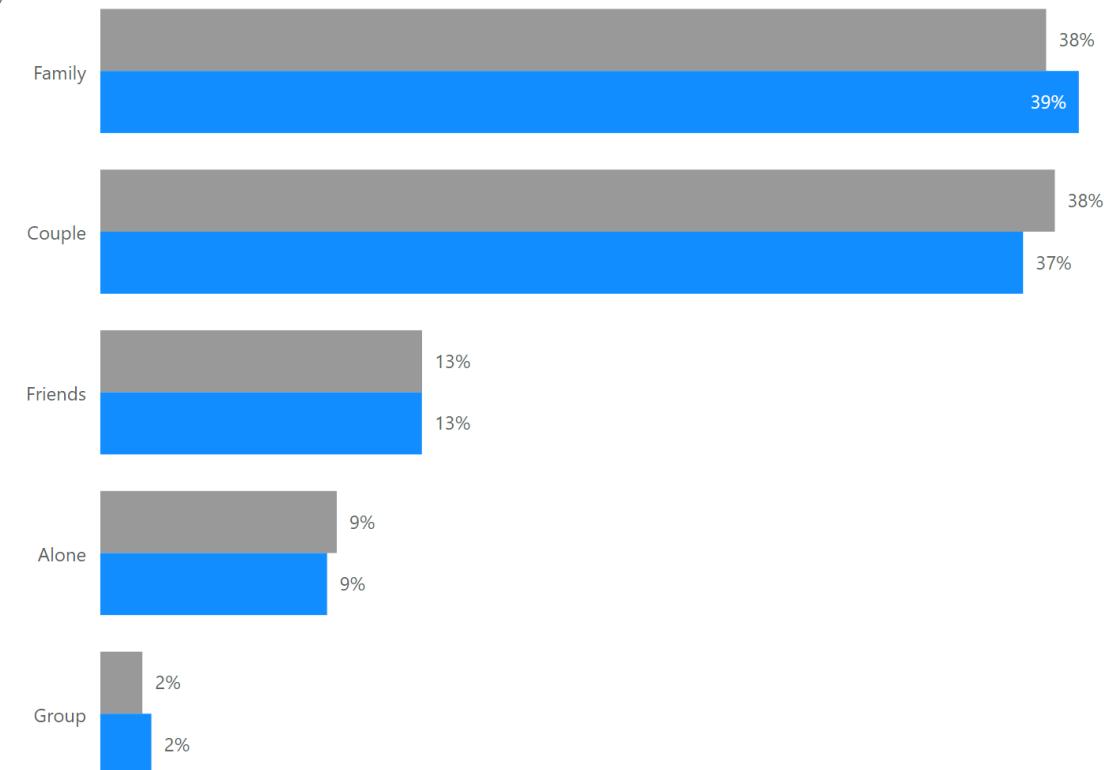
Trip organisation and preferences (3)

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

General preference for visiting iconic vs. lesser-known sites



Travel party (*)



- Travellers interested in wellness have a greater preference for visiting mostly iconic sites compared to overall visitors. Shares for travel parties are near equal.

(*) During last outbound holiday trip.

Source: LFT Brand & Potential Study, 2024.



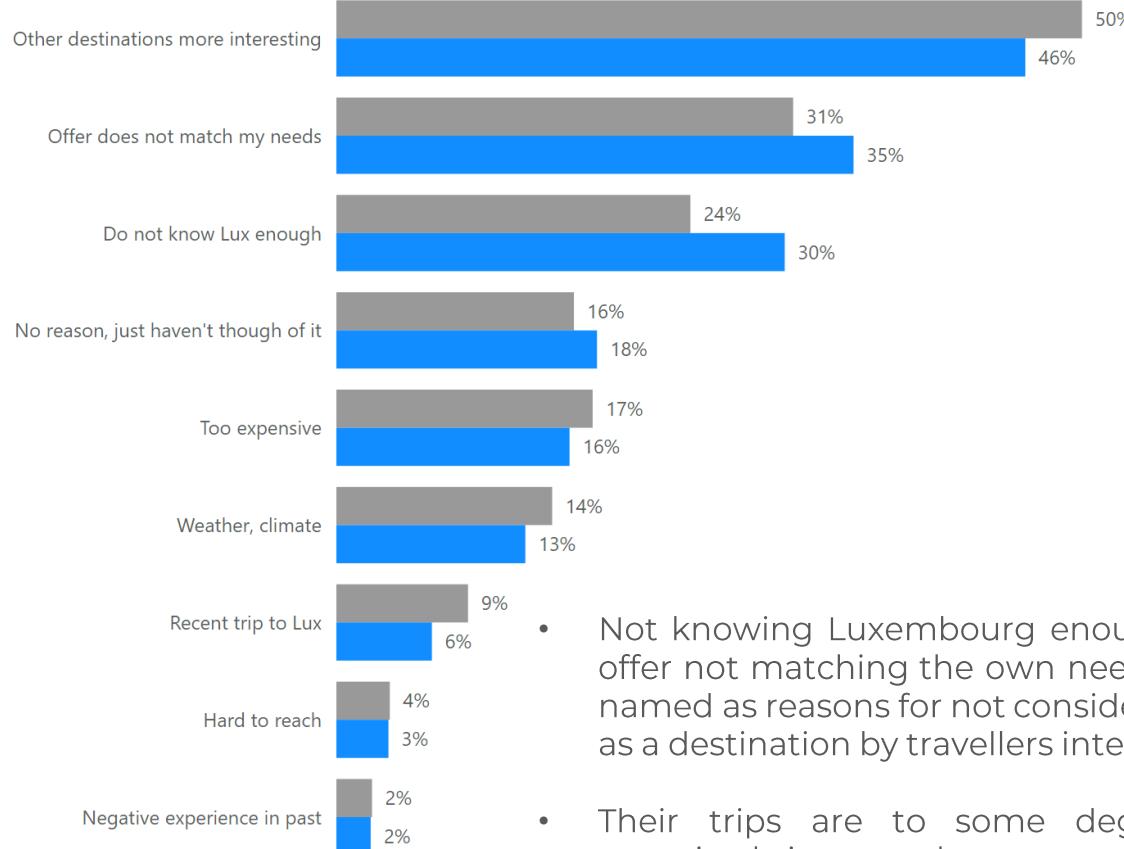
Trip organisation and preferences (4)

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

Reasons for not considering Luxembourg as a destination

● Total

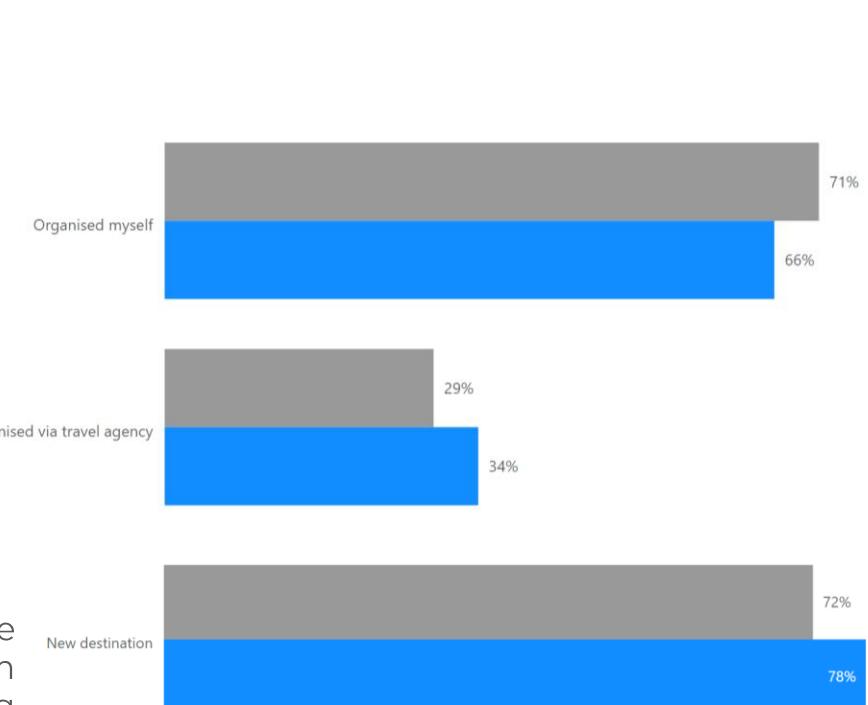
● Wellness (interest)



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

● Total

● Wellness (interest)



- Not knowing Luxembourg enough as well as the offer not matching the own needs are more often named as reasons for not considering Luxembourg as a destination by travellers interested in wellness.
- Their trips are to some degree more often organised via a travel agency and a larger share of travellers interested in wellness has travelled to a new destination during their last outbound trip.

(*) 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

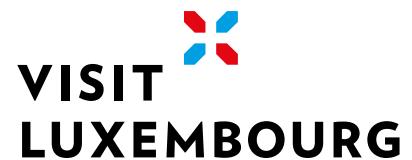


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