

Luxembourg for Tourism  
**Brand & Potential Study**  
2024 – MAIN RESULTS



# Sources, methodology and scope of the survey



- LFT Brand & Potential Studies have so far been fully carried out in 13 source markets : Germany, Netherlands, Belgium, Switzerland, Austria, France, UK, Italy, Spain, Ireland, Denmark, Sweden and Portugal. In addition, a more limited study has been realised in Poland (Brand funnel and Theme competence).
- The full studies include analyses of destination Luxembourg's Brand funnel, Theme Competence, Brand values, Spontaneous associations and a range of further demand indicators (travel inspiration, relevant destination KPIs, sustainability perception) in the relevant source markets.
- Results were compiled through online surveys representative for the population 18-75 years in each source market, with quotas for gender, age and regional origin.
- For source markets DE-BE-NL-FR-UK-CH-AT-DK-SE-IE-PT, LFT has designed, conducted and collated survey results via Pollfish online panel (sample size: 1,200-4,000, depending on markets). All additional data analysis and conclusions were carried out by LFT for all source markets. For source markets IT-ES-PL, LFT worked with an external data provider responsible for the design and implementation of the surveys and calculation of the results ("Destination Brand" by Inspektour, fieldwork by Ipsos in 2021, sample size : 1,000 per market). The update for these markets with a similar survey design and methodology as for the other markets (i.e., online panel survey carried out by LFT) will be available in 2025 and the new results will be included into the present report.
- The aim of the studies is to assess destination Luxembourg's brand strength, awareness and future visitation potential, and to measure the extent to which relevant tourism themes and brand attributes are associated with the destination.
- The data allows to identify potential growth markets and segments, future demand drivers, strengths and weaknesses in the perception of Luxembourg as a destination, and thus guide future marketing priorities and strategic decision-making.
- Reading note: Ranks and percentages that are overrepresented compared to the overall values are highlighted in **green** throughout the report where relevant.



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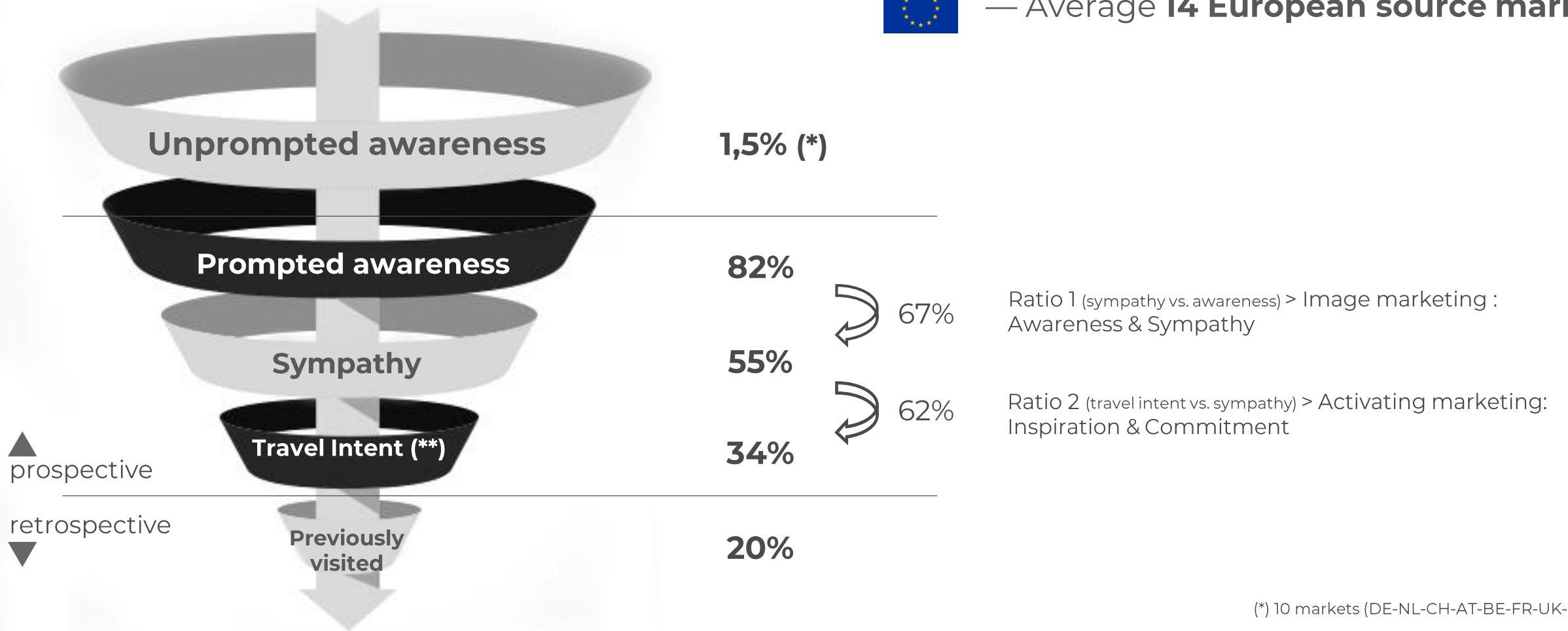
# Brand Funnel

# Destination Luxembourg – Brand Funnel 2024

## Assessing Luxembourg's **brand strength** as a destination



— Average **14 European source markets**



(\*) 10 markets (DE-NL-CH-AT-BE-FR-UK-IT-ES-PL)

(\*\*) next 3 years

# Destination Luxembourg – Brand Funnel 2024

## Assessing Luxembourg's **brand strength** as a destination



|                |  | Awareness<br>(supported) | Sympathy | Travel intent,<br>Total (*) | Travel intent,<br>Core (*) | Past Visits | Travel Intent (total) –<br>Past Visits, %pt |
|----------------|--|--------------------------|----------|-----------------------------|----------------------------|-------------|---|
| Belgium        |  | 88%                      | 67%      | 46%                         | 20%                        | 47%         | -1  |
| France         |  | 78%                      | 58%      | 43%                         | 18%                        | 21%         | +22   |
| Portugal       |  | 88%                      | 63%      | 41%                         | 22%                        | 9%          | +32   |
| Germany        |  | 80%                      | 62%      | 40%                         | 20%                        | 22%         | +18   |
| Switzerland    |  | 77%                      | 61%      | 37%                         | 16%                        | 26%         | +11   |
| Austria        |  | 83%                      | 58%      | 36%                         | 17%                        | 16%         | +20   |
| Netherlands    |  | 82%                      | 63%      | 35%                         | 17%                        | 50%         | -15   |
| Denmark        |  | 86%                      | 56%      | 33%                         | 13%                        | 24%         | +9  |
| United Kingdom |  | 84%                      | 52%      | 31%                         | 12%                        | 13%         | +18   |
| Italy          |  | 79%                      | 44%      | 28%                         | 9%                         | 10%         | +18   |
| Sweden         |  | 82%                      | 50%      | 27%                         | 11%                        | 17%         | +10   |
| Poland         |  | 76%                      | 50%      | 27%                         | 9%                         | 7%          | +20   |
| Ireland        |  | 91%                      | 53%      | 26%                         | 11%                        | 9%          | +17   |
| Spain          |  | 78%                      | 38%      | 26%                         | 9%                         | 12%         | +14   |

- A large net positive result in the last column indicates significant new potential (i.e., few past visits but high future travel intent).
- Strongest core future travel intent is recorded in BE, DE, FR and PT.

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

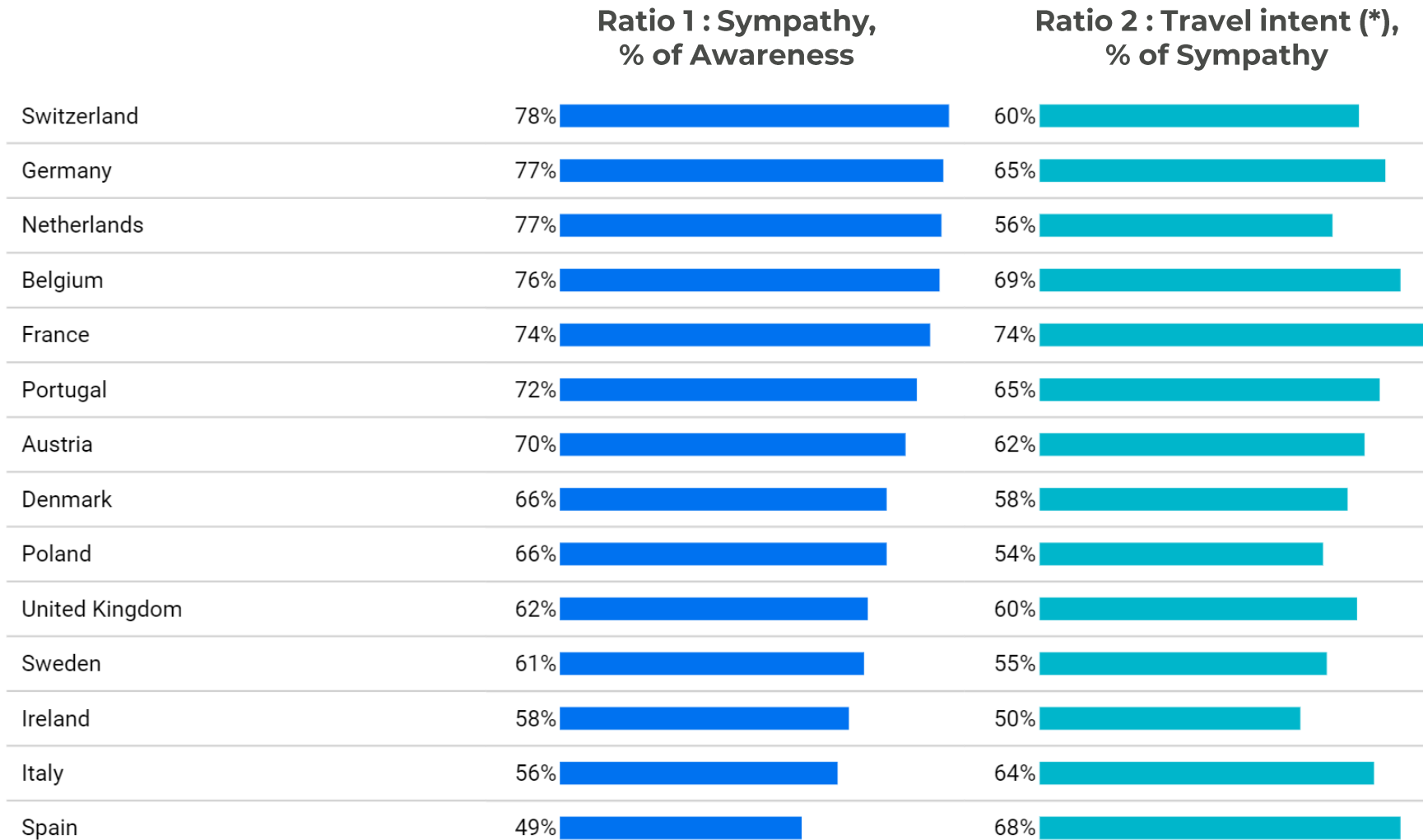
(\*) Travel intent : „total“ refers to answers „certainly“ + „rather yes“, „Core“ refers to answers „certainly“ only. All values refer to travel intent next 3 years.

# Destination Luxembourg – Ranking Sympathy - Travel Intent - Past Visits



| Source market | Sympathy (2021/2024) | Travel intent (next 3 years) (2024-2026) | Previously visited (2021/2024) |
|---------------|----------------------|--|--------------------------------|
| BE            | 1                    | 1  | 2                              |
| NL            | 2                    | 7  | 1                              |
| PT            | 3                    | 3  | 12                             |
| DE            | 4                    | 4  | 5                              |
| CH            | 5                    | 5  | 3                              |
| FR            | 6                    | 2  | 6                              |
| AT            | 7                    | 6  | 8                              |
| DK            | 8                    | 8  | 4                              |
| IE            | 9                    | 13                                       | 13                             |
| UK            | 10                   | 9  | 9                              |
| SE            | 11                   | 11                                       | 7                              |
| PL            | 12                   | 12                                       | 14                             |
| IT            | 13                   | 10                                       | 11                             |
| ES            | 14                   | 14                                       | 10                             |

# Destination Luxembourg – Ratios Awareness – Sympathy - Travel Intent, 2024

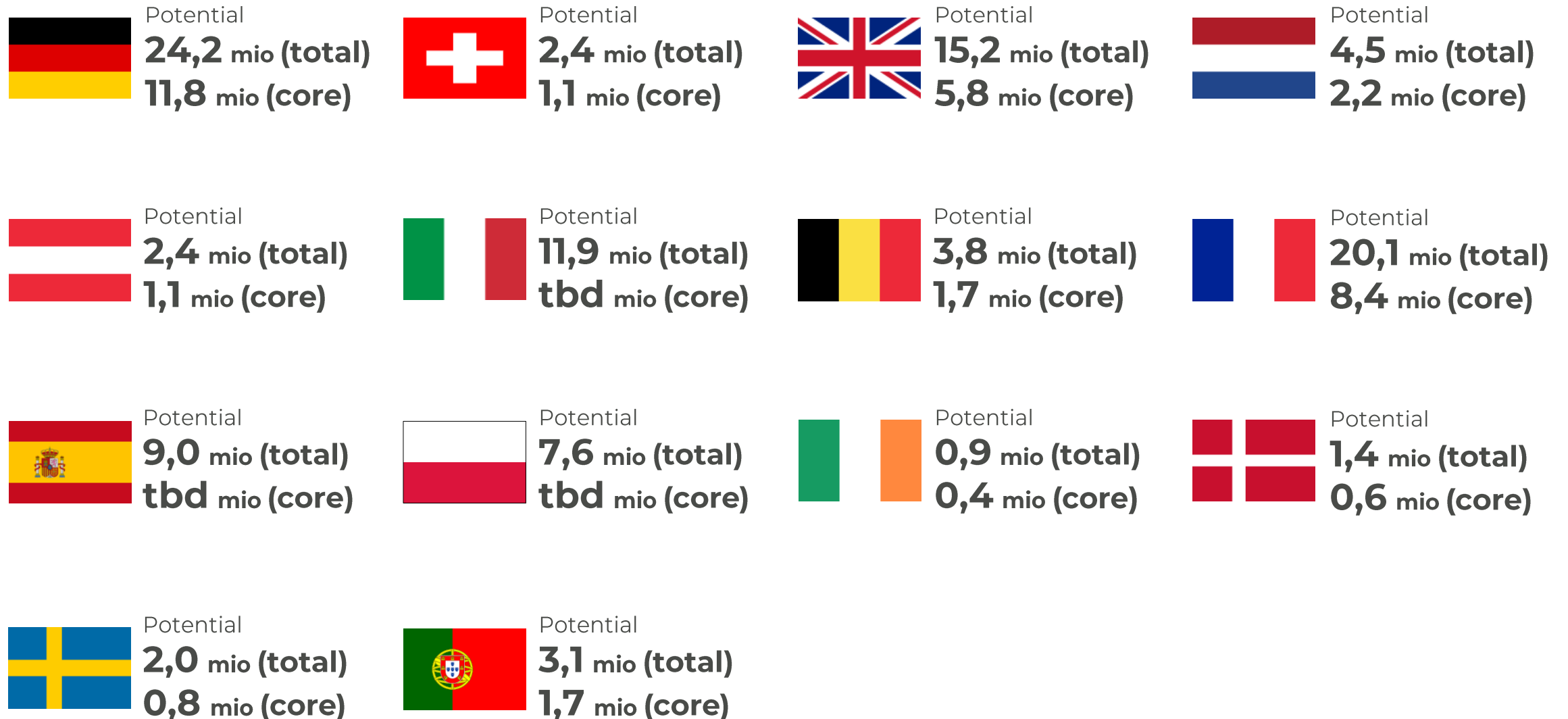


- These ratios are even more important than overall volumes: they reflect the share of potential maintained (or lost) along the brand funnel.
- Some markets have particularly high sympathy towards Luxembourg but relatively weaker travel intent (CH, NL), some other markets present exactly the opposite pattern (IT, ES).

(\*) next 3 years

# Destination Luxembourg – Brand Funnel 2024

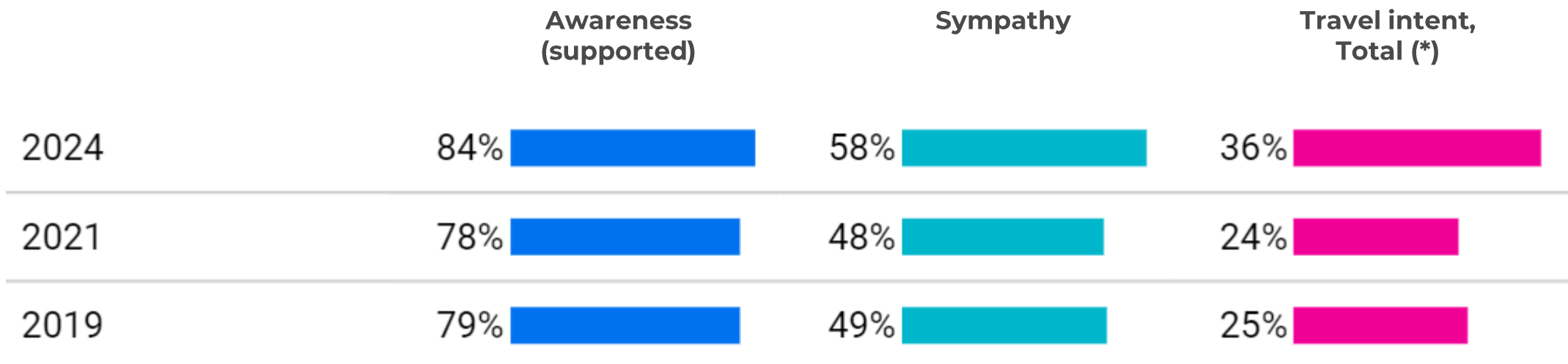
## Total visitor potential per market based on travel intent next 3 years





# Destination Luxembourg – Brand Funnel 2019–2024

Time comparison, average European markets (\*)



- Positive impact of both brand and activating marketing since 2019
- Improvement has been stronger for future travel intent than for sympathy.
- 2024 figures cannot directly be compared with 2019/21 since there has been a methodological change in the questionnaire, but trends remain valid given the large change rates.

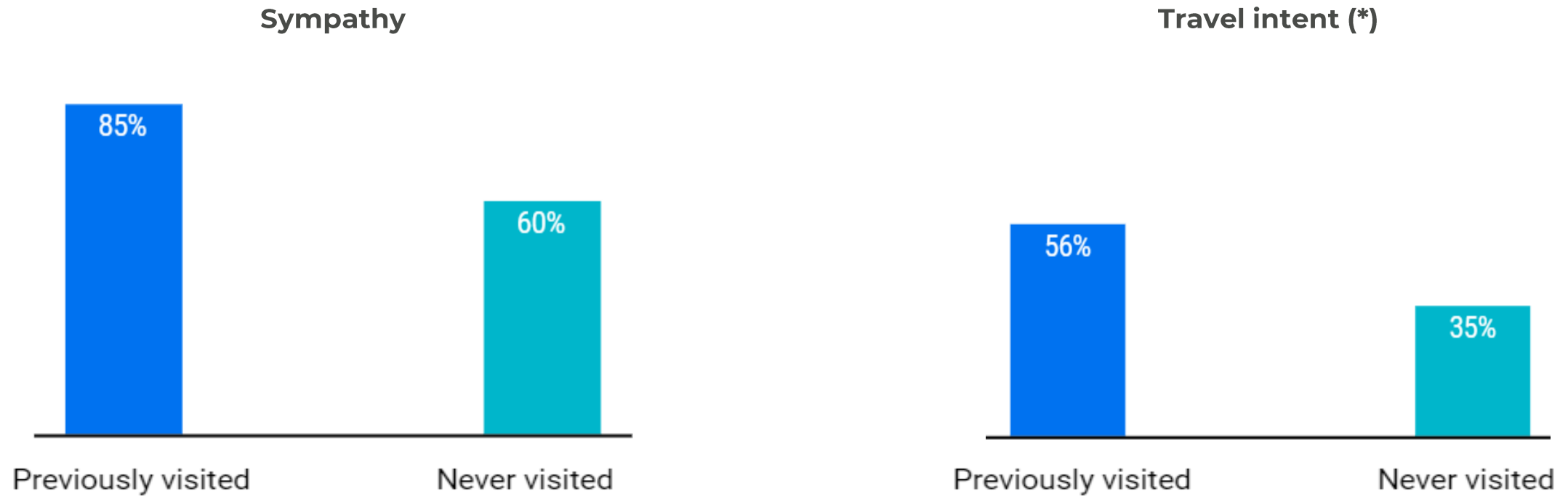
(\*) 2024: DE-BE-FR-NL-CH-AT-UK-IE-DK-SE-PT  
2021: DE-BE-FR-NL-CH-AT-UK-ES-IT-PL  
2019: DE-NL-CH-AT

# Destination Luxembourg – Brand Funnel 2024



Differences between brand connoisseurs with and without previous visiting experience

 — Average **14 European source markets**



Higher sympathy and future travel intent among past visitors: this confirms tourism's positive impact on nation branding.

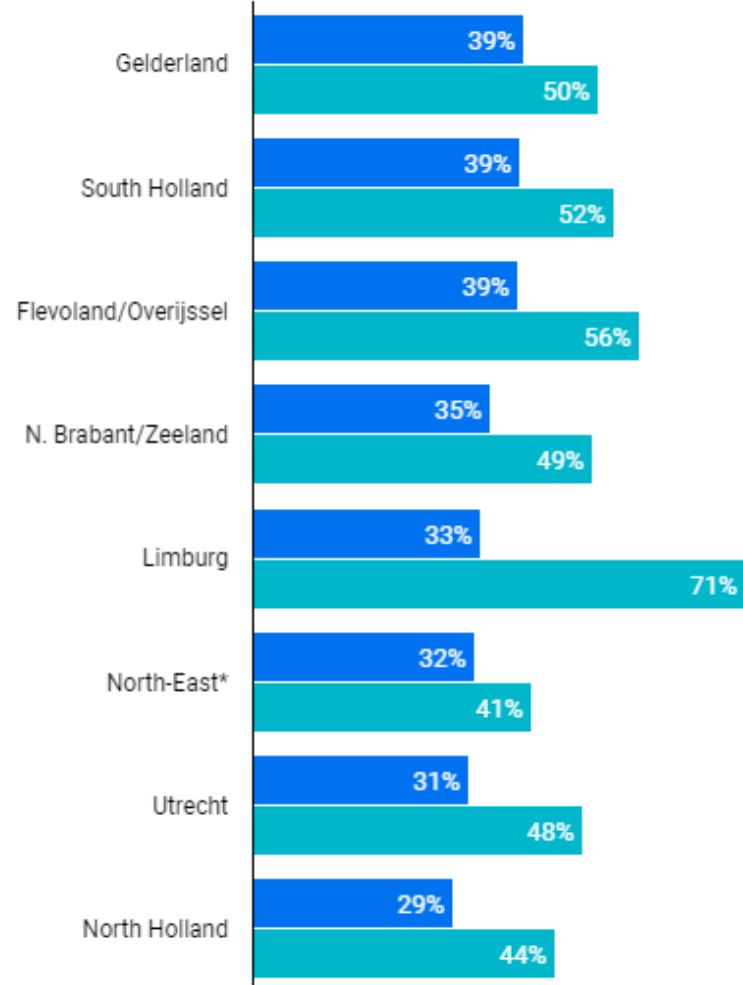
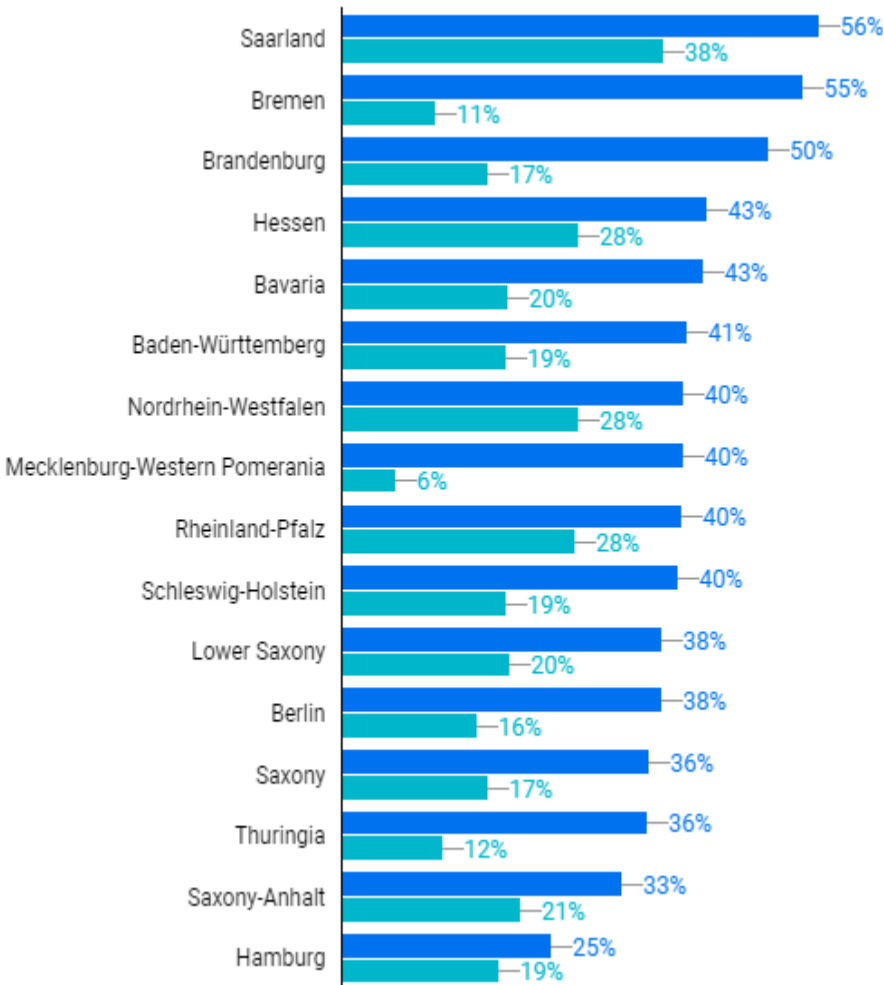
(\*) next 3 years

# Regional origin 2024



Past visitors and future potential –  
examples Germany & Netherlands (see full study report for further markets)

Travel intent (\*) Visits in the past



|                     | Travel Intent (mn) | Past visits (mn) |
|---------------------|--------------------|------------------|
| Baden-Württemberg   | 3.33               | 1.58             |
| Bavaria             | 4.16               | 1.90             |
| Berlin              | 1.04               | 0.44             |
| Brandenburg         | 0.92               | 0.32             |
| Bremen              | 0.27               | 0.05             |
| Hamburg             | 0.34               | 0.26             |
| Hessen              | 1.99               | 1.29             |
| Lower Saxony        | 2.21               | 1.15             |
| Mecklenburg-W.P.    | 0.47               | 0.07             |
| Nordrhein-Westfalen | 5.29               | 3.66             |
| Rheinland-Pfalz     | 1.21               | 0.83             |
| Saarland            | 0.41               | 0.28             |
| Saxony              | 1.04               | 0.50             |
| Saxony-Anhalt       | 0.51               | 0.33             |
| Schleswig-Holstein  | 0.84               | 0.41             |
| Thuringia           | 0.55               | 0.18             |

|                      | Travel Intent (mn) | Past visits (mn) |
|----------------------|--------------------|------------------|
| Flevoland/Overijssel | 0.45               | 0.65             |
| Gelderland           | 0.60               | 0.77             |
| Limburg              | 0.27               | 0.59             |
| N. Brabant/Zeeland   | 0.75               | 1.07             |
| North Holland        | 0.63               | 0.95             |
| North-East*          | 0.41               | 0.51             |
| South Holland        | 1.06               | 1.44             |
| Utrecht              | 0.31               | 0.48             |

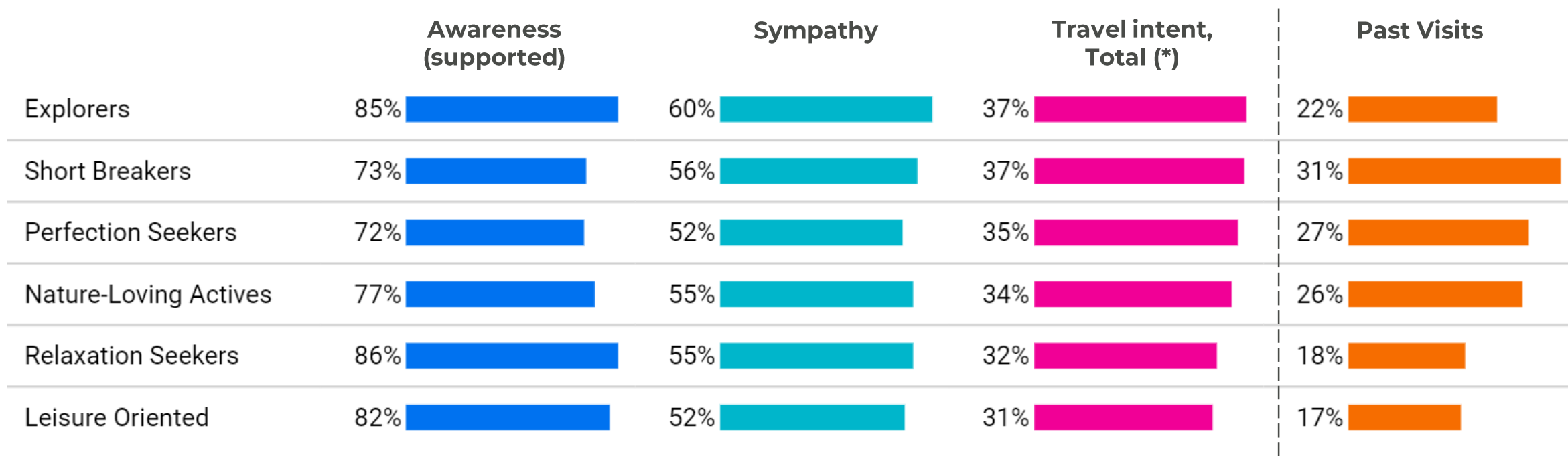
Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

# Destination Luxembourg – Brand funnel 2024

— Average 14 European source markets — LFT target segments



Please note that on this and all following slides, target segments displayed are proxies (since SINUS milieus were not part of brand studies)

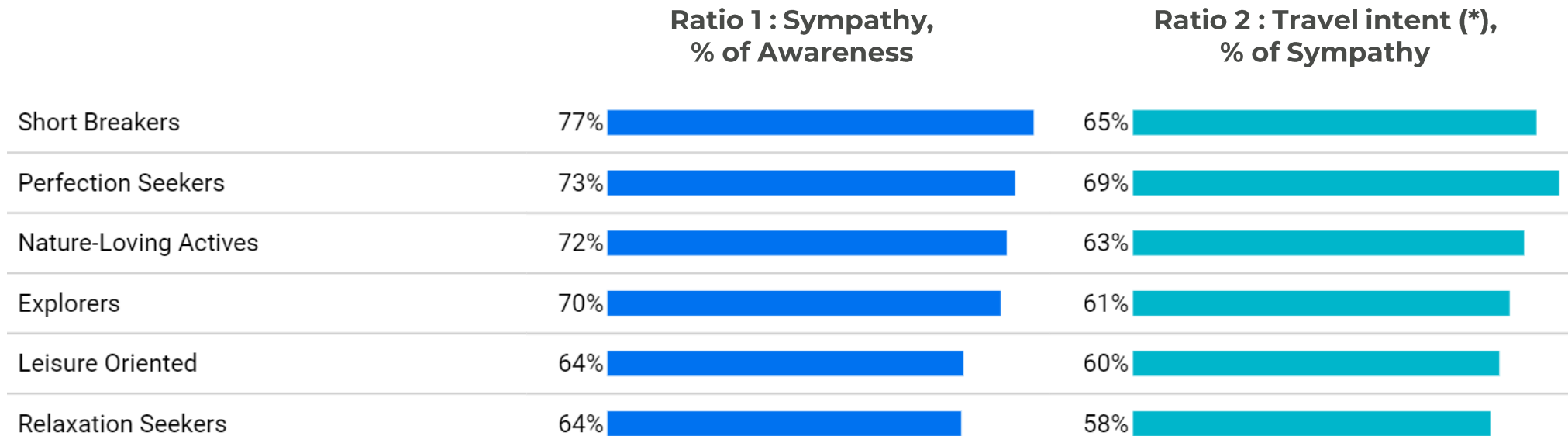


| Top 2 segments    | AT             | BE            | DK            | FR            | DE            | IE            | IT             | NL            | PL            | PT             | ES            | SE             | CH            | UK            | Ø EUR         |
|-------------------|----------------|---------------|---------------|---------------|---------------|---------------|----------------|---------------|---------------|----------------|---------------|----------------|---------------|---------------|---------------|
| Sympathy          | 1 EXP<br>2 RS  | 1 SB<br>2 EXP | 1 EXP<br>2 PS | 1 EXP<br>2 RS | 1 EXP<br>2 RS | 1 PS<br>2 NLA | 1 LO<br>2 PS   | 1 EXP<br>2 RS | 1 PS<br>2 NLA | 1 NLA<br>2 LO  | 1 LO<br>2 NLA | 1 NLA<br>2 EXP | 1 EXP<br>2 RS | 1 EXP<br>2 SB | 1 EXP<br>2 SB |
| Travel intent (*) | 1 EXP<br>2 NLA | 1 SB<br>2 NLA | 1 EXP<br>2 PS | 1 EXP<br>2 PS | 1 EXP<br>2 RS | 1 PS<br>2 EXP | 1 NLA<br>2 PS  | 1 EXP<br>2 LO | 1 PS<br>2 NLA | 1 NLA<br>2 PS  | 1 NLA<br>2 LO | 1 PS<br>2 NLA  | 1 EXP<br>2 PS | 1 EXP<br>2 SB | 1 EXP<br>2 SB |
| Past Visits       | 1 NLA<br>2 PS  | 1 SB<br>2 NLA | 1 NLA<br>2 PS | 1 PS<br>2 NLA | 1 PS<br>2 EXP | 1 PS<br>2 NLA | 1 NLA<br>2 EXP | 1 PS<br>2 NLA | 1 PS<br>2 LO  | 1 NLA<br>2 EXP | 1 NLA<br>2 LO | 1 PS<br>2 NLA  | 1 PS<br>2 NLA | 1 PS<br>2 NLA | 1 SB<br>2 PS  |

(\*) next 3 years

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

# Destination Luxembourg – Ratios Awareness – Sympathy - Travel Intent, 2024



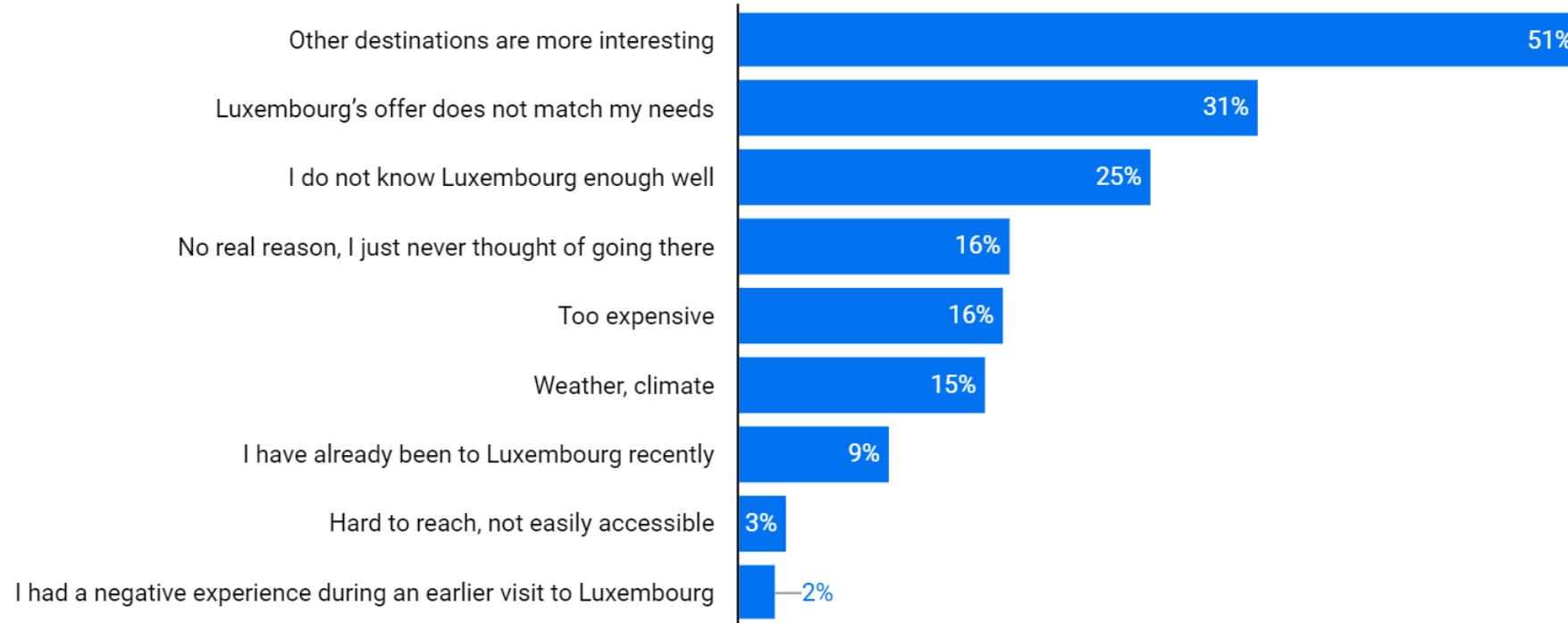
- SB have particularly high sympathy towards Luxembourg but relatively weaker travel intent, while PS have particularly high future travel intent, compared to sympathy levels.
- Comparatively high shares of sympathy and travel intent are being lost along the brand funnel for EXP, meaning this core target segment for Luxembourg will require further marketing focus.

(\*) next 3 years



# Reasons for not choosing Luxembourg as a next destination

🇪🇺 — Average 11 European markets\*



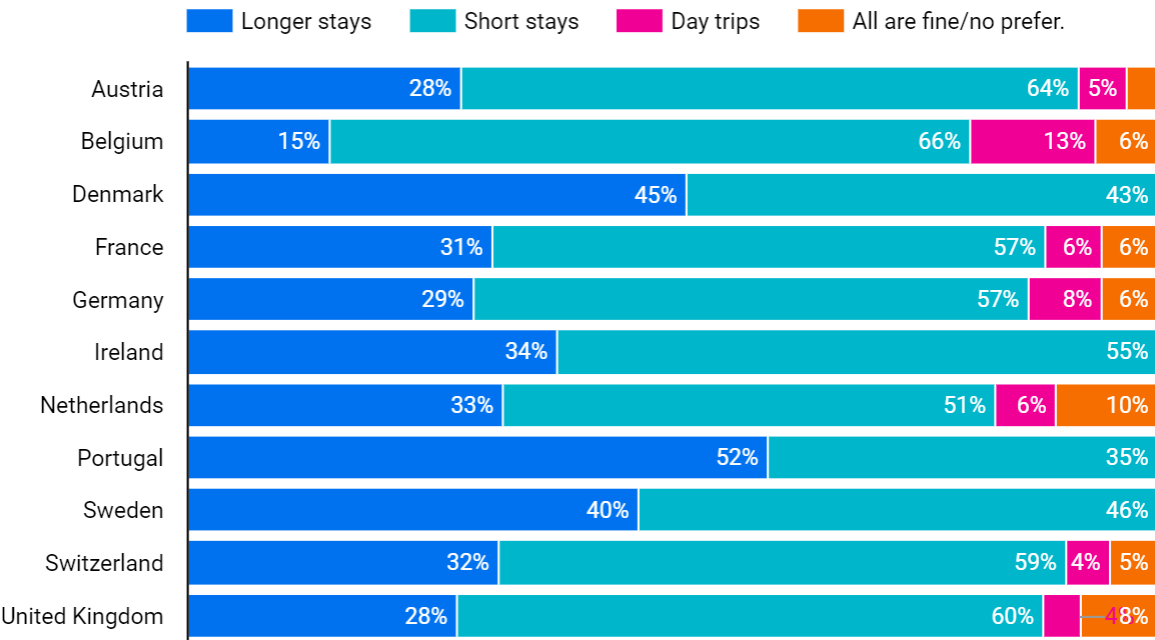
\* DE-FR-BE-NL-UK-CH-AT-IE-DK-SE-PT

# Reasons for not choosing Luxembourg as a next destination - Ranking by Source Markets

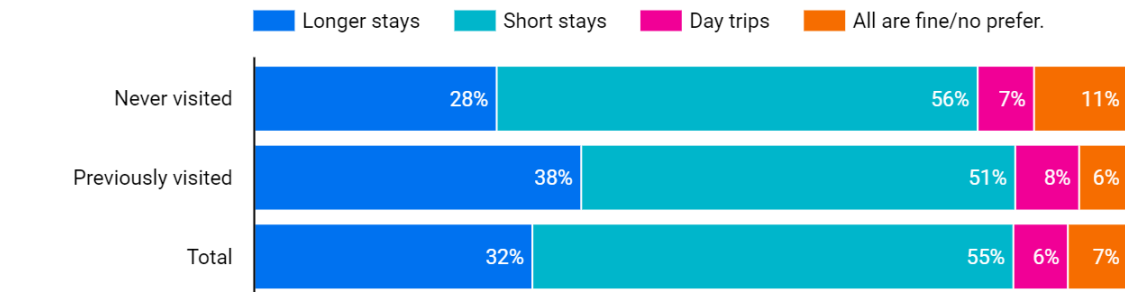
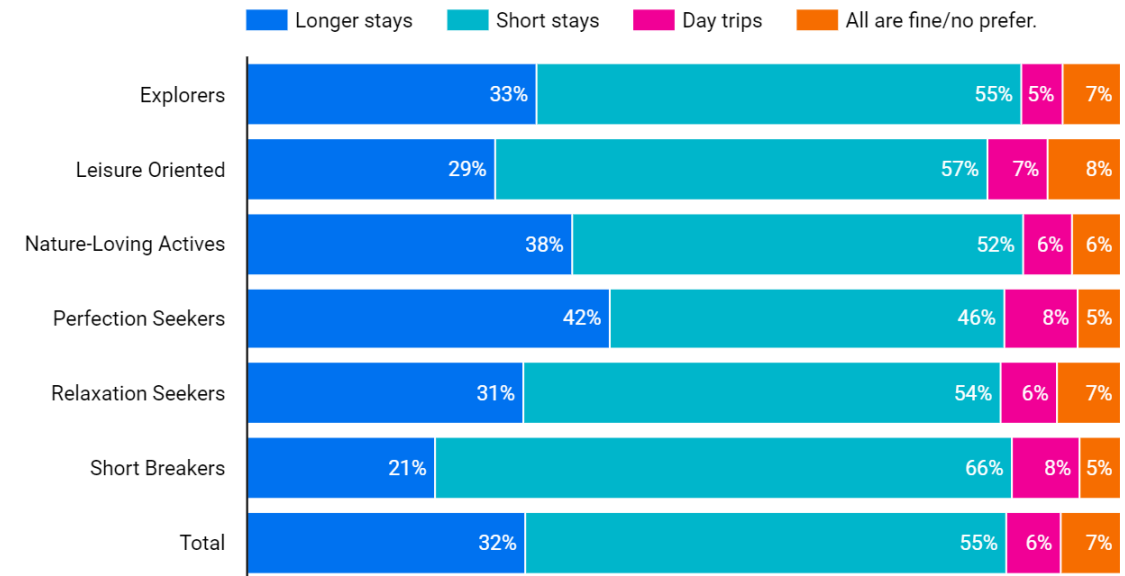


| Reasons   |  |  |  |  |  |  |  |  |  |  |  |  |
|---|---|--|---|---|---|---|---|---|---|---|---|---|
| Other destinations are more interesting                           | 1   | 1  | 1   | 1   | 1   | 1   | 1   | 1   | 1   | 1   | 1   | 1   |
| I do not know Luxembourg enough well                              | 3   | 4  | 3   | 3   | 4   | 3   | 2   | 2   | 2   | 2   | 2   | 7   |
| Luxembourg's offer does not match my needs                        | 4   | 2  | 2   | 2   | 2   | 2   | 3   | 4   | 4   | 4   | 4   | 2   |
| Too expensive   | 5   | 5  | 5   | 5   | 5   | 6   | 5   | 3   | 6   | 3   | 3   | 3   |
| No real reason, I just never thought of going there               | 2   | 7  | 6   | 4   | 7   | 4   | 4   | 5   | 3   | 7   | 7   | 4   |
| I have already been to Luxembourg recently                        | 7   | 5  | 7   | 7   | 6   | 7   | 7   | 6   | 5   | 5   | 5   | 6   |
| Weather, climate  | 6   | 3  | 4   | 6   | 3   | 5   | 6   | 7   | 7   | 7   | 6   | 5   |
| Hard to reach, not easily accessible                              | 8   | 9  | 8   | 8   | 9   | 8   | 8   | 8   | 8   | 8   | 8   | 9   |
| I had a negative experience during an earlier visit to Luxembourg | 9   | 8  | 8   | 9   | 8   | 9   | 9   | 9   | 9   | 9   | 9   | 8   |

# Potential preference of length of stay in Luxembourg

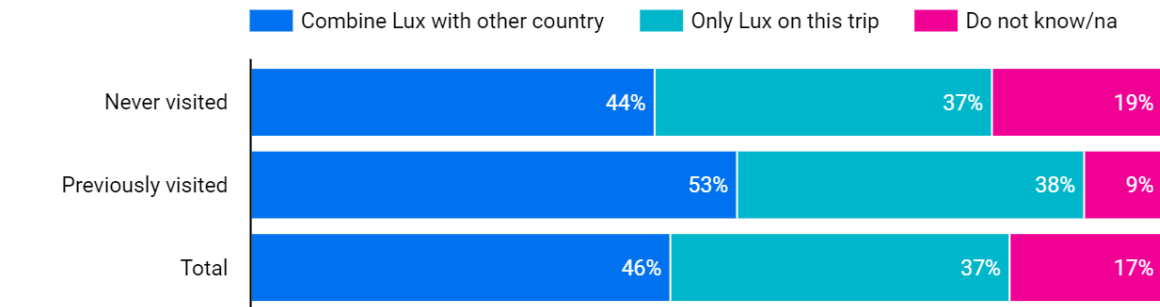
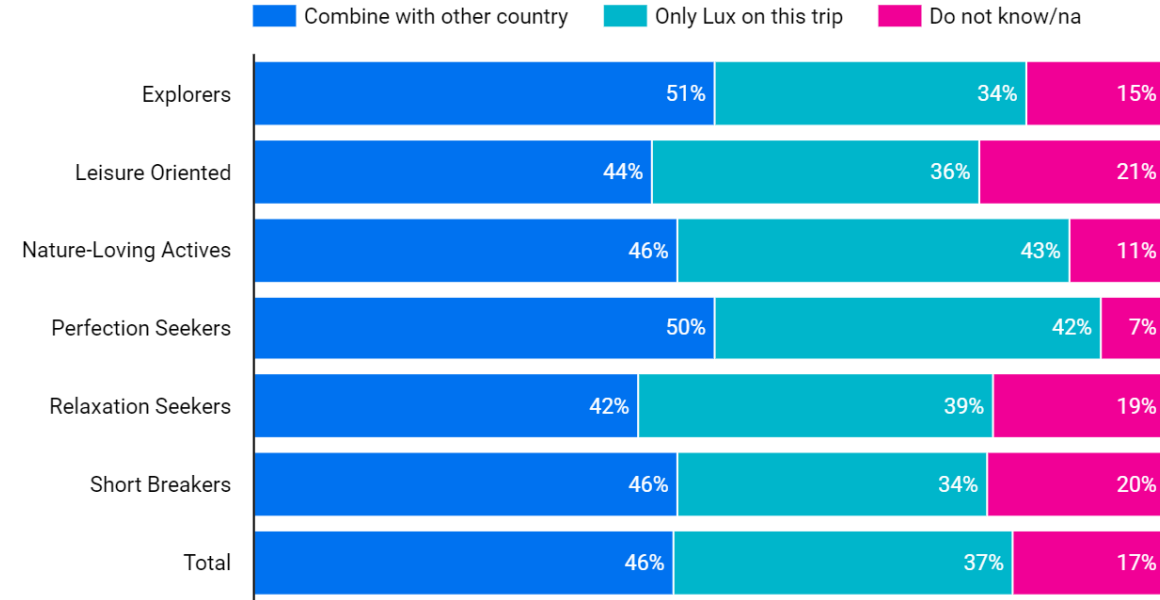
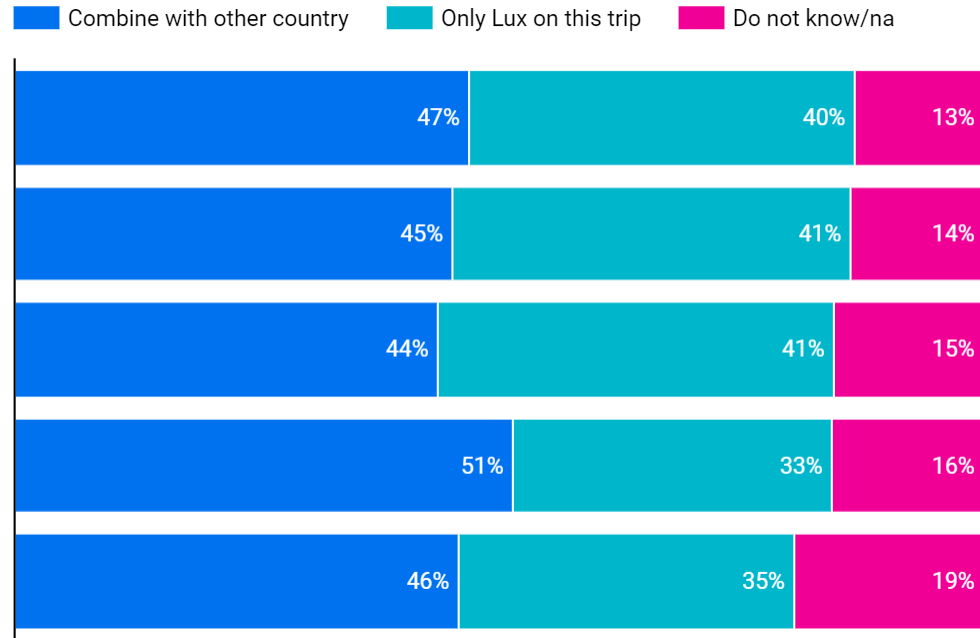


- Respondents with future travel from the Nordics and PT have most frequently expressed a preference for longer stays in Luxembourg.
- By far the least interest for longer trips to Luxembourg is recorded among Belgians, due to the relative proximity, also resulting in the highest relative interest for day trips.



- PS and NLA are most interested in future longer stays to Luxembourg.
- Although lower than among repeat visitors, a fair share of new potential visitors is also interested in longer stays.

# Potential preference for cross-border travel when visiting Luxembourg

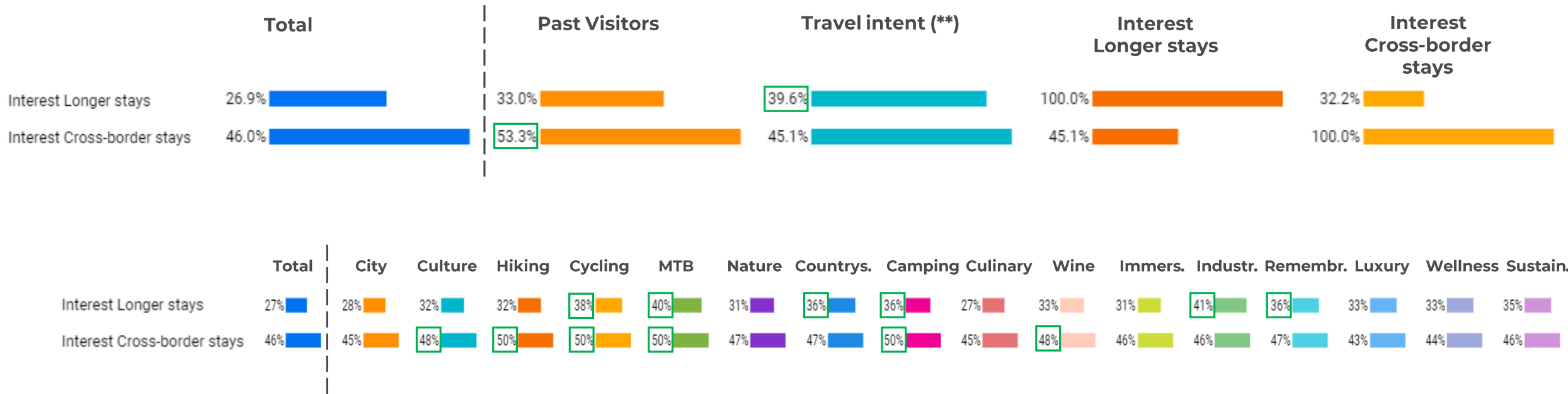


- Swiss and British future visitors would most consider combining Luxembourg with another destination during their trip.

- EXP and past visitors are most interested in combining Luxembourg with another destination during their trip.

# Potential preference of length of stay and for cross-border travel when visiting Luxembourg

— Average **European source markets\***, by theme interest / further demand indicators



- Potential Luxembourg visitors interested in cycling, MTB, countryside holidays, camping, industrial heritage and remembrance tourism are more often interested in longer future stays in Luxembourg.
- Potential Luxembourg visitors interested in hiking, cycling, MTB, culture and wine are more often interested in combining Luxembourg with another destination on their future trips.
- Potential Luxembourg visitors interested in longer stays and those interested in combining Luxembourg with another destination are largely complementary segments.

\* Longer stays : AT-BE-CH-DE-FR-NL-UK („Total“ value differs from previous slides as fewer markets are included). Cross-border stays : AT-CH-DE-FR-UK.

\*\* Next 3 years.





2

Spontaneous  
brand associations



# Spontaneous brand associations

Associations with Luxembourg — word cloud  
(see full study report for further markets)



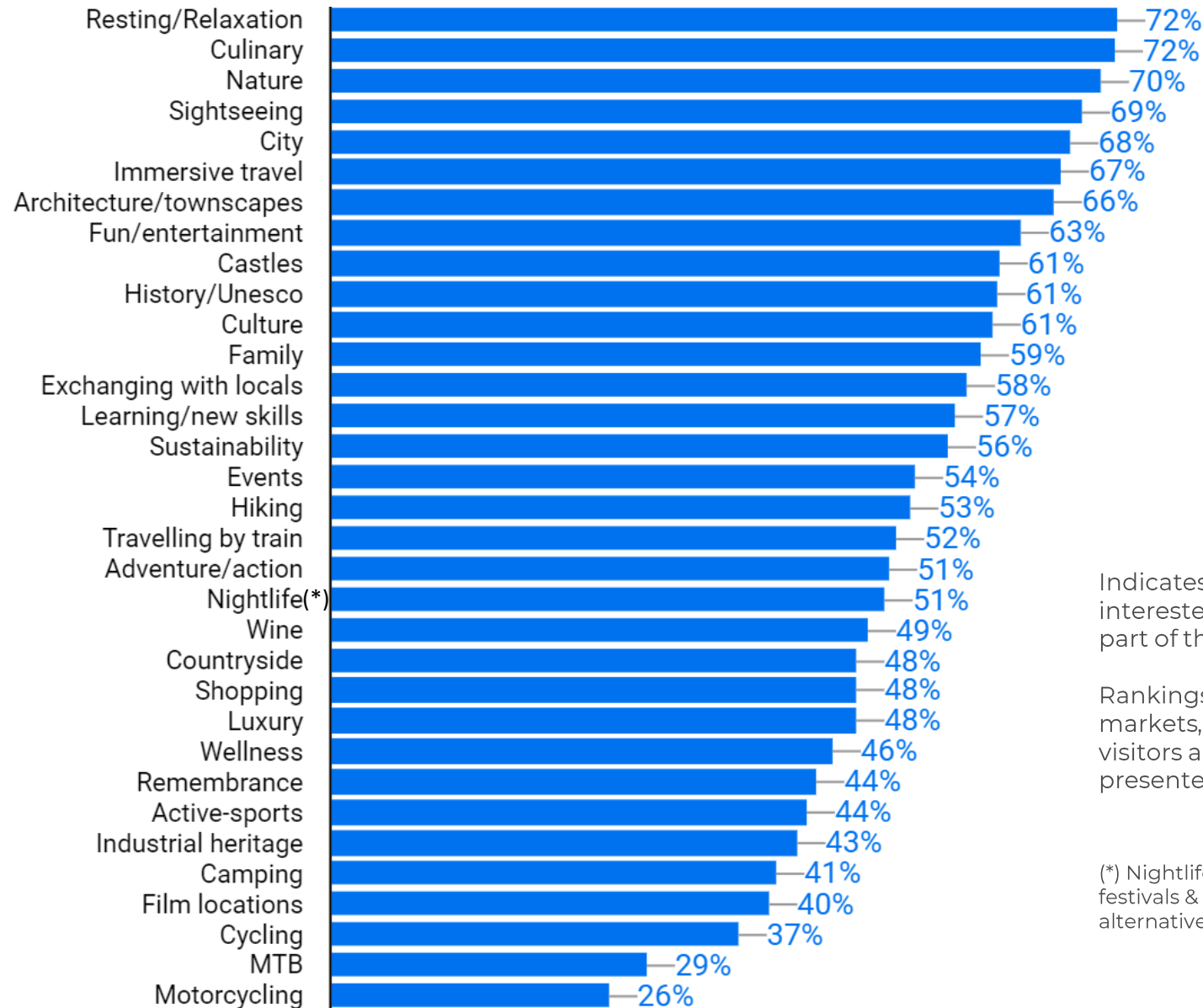


3a

General Theme Interest

# General Theme Interest
















— Average 14 European source markets



Indicates the share of respondents interested in the themes & experiences as part of their holiday trips in general.

Rankings, resp. percentages by source markets, past visitors, new potential visitors and LFT target segments are presented on the following pages.

(\*) Nightlife on this and on all following slides refers to : festivals & events, urban lifestyle, lively places (trendy or alternative quarters).

| General Theme Interest - Ranking by Source Markets   |                |  |  |  |   |  |  |  |  |  |  |  |  |  |  |  |
|--|----------------|--|--|--|---|--|--|--|--|--|--|--|--|--|--|--|
|  | Average Europe |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Resting/Relaxation   | 1              | 3  | 2  | 1  | 5   | 2  | 1  | 5  | 1  | 1  | 2  | 6  | 1  | 3  | 3  |  |
| Culinary   | 2              | 1  | 3  | 2  | 1   | 1  | 2  | 3  | 3  | 5  | 1  | 2  | 2  | 2  | 2  |  |
| Nature   | 3              | 2  | 1  | 3  | 4   | 3  | 4  | 3  | 2  | 2  | 4  | 4  | 3  | 1  | 5  |  |
| Sightseeing  | 4              | 4  | 4  |  | 2   | 5  |  |  | 4  |  |  |  |  | 5  | 1  |  |
| City   | 5              | 6  | 9  | 5  | 15  | 7  | 3  | 1  | 6  | 2  | 9  | 1  | 4  | 6  | 7  |  |
| Immersive travel   | 6              | 5  | 8  |  | 3   | 4  |  |  | 10   |  |  |  |  | 4  | 6  |  |
| Architecture/townscapes  | 7              | 7  | 7  |  | 6   | 6  |  |  | 5  |  |  |  |  | 7  | 4  |  |
| Fun/entertainment  | 8              | 8  | 6  |  | 10  | 8  |  |  | 7  |  |  |  |  | 8  | 8  |  |
| Castles  | 9              | 11   | 13   | 11   | 16  | 10   | 12   | 2  | 11   | 4  | 10   | 3  | 11   | 12   | 11   |  |
| History/Unesco   | 10             | 12   | 12   | 9  | 11  | 13   | 10   | 6  | 13   | 6  | 7  | 5  | 7  | 14   | 9  |  |
| Culture  | 11             | 13   | 15   | 6  | 12  | 9  | 8  | 7  | 12   | 8  | 5  | 6  | 8  | 10   | 10   |  |
| Family   | 12             | 9  | 5  | 4  | 7   | 11   | 5  | 14   | 8  | 12   | 3  | 12   | 6  | 15   | 12   |  |
| Exchanging with locals   | 13             | 10   | 14   |  | 9   | 12   |  |  | 15   |  |  |  |  | 11   | 13   |  |
| Learning/new skills  | 14             | 14   | 11   |  | 8   | 14   |  |  | 17   |  |  |  |  | 9  | 20   |  |
| Sustainability   | 15             | 16   | 16   | 12   | 14  | 16   | 6  | 9  | 18   | 10   | 8  | 9  | 5  | 18   | 14   |  |
| Events   | 16             | 15   | 17   | 7  | 13  | 15   | 11   | 11   | 20   | 11   | 14   | 14   | 9  | 13   | 18   |  |
| Hiking   | 17             | 17   | 10   | 14   | 17  | 18   | 20   | 8  | 9  | 7  | 13   | 16   | 17   | 17   | 16   |  |
| Travelling by train  | 18             | 20   | 23   | 19   | 19  | 24   | 9  |  | 26   |  | 11   |  | 10   | 16   | 15   |  |
| Adventure/action   | 19             | 19   | 18   |  | 18  | 19   |  |  | 14   |  |  |  |  | 20   | 23   |  |
| Nightlife  | 20             | 18   | 24   | 15   | 20  | 17   | 13   | 10   | 21   | 16   | 15   | 8  | 16   | 19   | 24   |  |
| Wine   | 21             | 23   | 21   | 17   | 24  | 21   | 15   |  | 25   | 9  | 16   |  | 15   | 24   | 25   |  |
| Countryside  | 22             | 24   | 20   | 16   | 25  | 25   | 17   | 12   | 24   | 12   | 12   | 13   | 13   | 27   | 17   |  |
| Shopping   | 23             | 25   | 19   | 10   | 22  | 22   | 14   | 13   | 19   | 12   | 17   | 14   | 14   | 21   | 22   |  |
| Luxury   | 24             | 27   | 27   | 8  | 31  | 29   | 7  |  | 16   |  | 20   |  | 12   | 25   | 19   |  |
| Wellness   | 25             | 22   | 28   | 13   | 27  | 23   | 16   | 16   | 30   | 20   | 6  | 10   | 18   | 23   | 28   |  |
| Remembrance  | 26             | 28   | 22   |  | 21  | 27   |  |  | 27   |  |  |  |  | 28   | 27   |  |
| Active-sports  | 27             | 21   | 26   | 20   | 23  | 20   | 18   | 15   | 22   | 18   | 18   | 17   | 19   | 22   | 29   |  |
| Industrial heritage  | 28             | 30   | 29   | 21   | 26  | 28   | 19   | 17   | 29   | 15   | 19   | 11   | 21   | 26   | 21   |  |
| Camping  | 29             | 29   | 31   | 18   | 30  | 30   | 21   |  | 28   |  | 21   |  | 20   | 30   | 30   |  |
| Film locations   | 30             | 31   | 30   |  | 28  | 31   |  |  | 31   |  |  |  |  | 31   | 26   |  |
| Cycling  | 31             | 26   | 25   | 22   | 29  | 26   | 22   | 18   | 23   | 17   | 23   | 18   | 22   | 29   | 31   |  |
| MTB  | 32             | 32   | 32   | 23   | 32  | 32   | 23   | 19   | 32   | 18   | 22   | 19   | 24   | 32   | 32   |  |
| Motorcycling   | 33             | 33   | 33   | 24   | 33  | 33   | 24   | 19   | 33   | 21   | 24   | 20   | 23   | 33   | 33   |  |
| Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour. |                |  |  |  |   |  |  |  |  |  |  |  |  |  |  |  |



# General Theme Interest — Average 14 European source markets —



Past and future visitors - LFT target segments



|                         | Total | Travel intent (*) | Past Visitors | EXP   | NLA   | RS    | SB    | PS    | LO    |
|-------------------------|-------|-------------------|---------------|-------|-------|-------|-------|-------|-------|
| Culinary                | 71.5% | 76.2%             | 73.6%         | 72.5% | 69.5% | 73.9% | 68.4% | 68.9% | 68.5% |
| Resting/Relaxation      | 71.3% | 74.3%             | 72.5%         | 68.7% | 67.6% | 76.7% | 69.5% | 69.1% | 69.6% |
| Nature                  | 69.8% | 74.7%             | 73.6%         | 73.1% | 72.2% | 70.0% | 67.9% | 68.4% | 67.0% |
| Sightseeing             | 68.9% | 74.5%             | 73.5%         | 74.6% | 65.7% | 67.4% | 66.9% | 66.8% | 67.9% |
| City                    | 67.7% | 74.2%             | 70.3%         | 69.7% | 60.6% | 64.1% | 64.5% | 64.9% | 62.4% |
| Immersive travel        | 66.9% | 72.0%             | 71.3%         | 72.6% | 65.6% | 64.3% | 64.8% | 66.1% | 65.9% |
| Architecture/townscapes | 66.4% | 72.3%             | 70.6%         | 71.5% | 64.7% | 63.5% | 66.5% | 66.2% | 65.1% |
| Fun/entertainment       | 63.4% | 68.8%             | 62.9%         | 62.0% | 58.2% | 65.2% | 59.9% | 66.4% | 64.9% |
| Castles                 | 61.3% | 68.4%             | 67.5%         | 64.1% | 62.0% | 54.0% | 59.5% | 57.5% | 56.5% |
| History/Unesco          | 61.0% | 69.1%             | 66.0%         | 68.5% | 61.4% | 54.5% | 60.3% | 59.2% | 57.5% |
| Culture                 | 60.7% | 67.1%             | 67.1%         | 67.9% | 60.3% | 55.3% | 60.0% | 60.8% | 57.2% |
| Family                  | 59.6% | 63.9%             | 62.5%         | 60.8% | 60.4% | 65.0% | 60.8% | 64.5% | 64.5% |
| Exchanging with locals  | 58.4% | 63.1%             | 63.8%         | 66.3% | 59.7% | 53.4% | 57.5% | 60.9% | 55.8% |
| Sustainability          | 57.6% | 62.5%             | 61.1%         | 60.5% | 62.3% | 54.2% | 56.8% | 60.0% | 55.7% |
| Learning/new skills     | 57.1% | 64.6%             | 60.5%         | 63.5% | 58.8% | 52.9% | 54.4% | 61.7% | 54.9% |
| Events                  | 55.6% | 61.3%             | 58.9%         | 59.3% | 56.3% | 52.7% | 53.7% | 61.2% | 52.8% |
| Hiking                  | 53.2% | 58.3%             | 59.5%         | 57.5% | 68.7% | 48.0% | 54.9% | 56.9% | 51.1% |
| Travelling by train     | 51.8% | 56.9%             | 57.0%         | 56.9% | 56.0% | 46.0% | 54.2% | 57.8% | 48.9% |
| Nightlife               | 51.2% | 56.8%             | 54.0%         | 53.2% | 48.6% | 49.2% | 49.6% | 59.5% | 48.0% |
| Adventure/action        | 51.1% | 56.9%             | 52.4%         | 54.6% | 55.4% | 46.8% | 47.2% | 61.3% | 49.3% |
| Countryside             | 49.1% | 52.4%             | 54.7%         | 50.6% | 60.7% | 44.4% | 52.0% | 51.8% | 47.7% |
| Wine                    | 48.3% | 52.3%             | 55.3%         | 50.8% | 52.2% | 45.9% | 48.1% | 55.2% | 44.6% |
| Shopping                | 48.2% | 52.9%             | 51.5%         | 46.0% | 46.3% | 51.2% | 47.0% | 55.5% | 48.9% |
| Luxury                  | 48.1% | 51.6%             | 51.5%         | 45.8% | 44.3% | 51.8% | 44.6% | 59.4% | 42.0% |
| Wellness                | 47.2% | 49.8%             | 50.0%         | 44.1% | 52.4% | 48.5% | 46.4% | 55.8% | 45.9% |
| Remembrance             | 44.4% | 49.5%             | 50.9%         | 48.5% | 47.0% | 39.2% | 45.8% | 53.9% | 42.3% |
| Industrial heritage     | 42.8% | 48.3%             | 49.9%         | 47.0% | 49.4% | 36.4% | 46.1% | 49.4% | 41.1% |
| Active-sports           | 41.9% | 45.8%             | 49.3%         | 46.6% | 63.7% | 41.0% | 45.7% | 55.8% | 42.2% |
| Camping                 | 41.0% | 41.0%             | 46.1%         | 41.1% | 51.1% | 36.3% | 41.5% | 50.4% | 41.4% |
| Film locations          | 39.9% | 46.1%             | 40.4%         | 41.5% | 40.9% | 35.7% | 41.8% | 53.5% | 38.3% |
| Cycling                 | 37.4% | 41.4%             | 45.0%         | 38.7% | 56.0% | 32.9% | 41.2% | 45.6% | 36.8% |
| MTB                     | 28.7% | 29.8%             | 35.1%         | 29.6% | 48.3% | 24.4% | 30.8% | 45.8% | 28.1% |
| Motorcycling            | 26.8% | 25.4%             | 32.7%         | 26.3% | 36.3% | 22.7% | 29.3% | 42.0% | 26.2% |

(\*) To Luxembourg next 3 years and without previous visits

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

# Correlation between themes

— Average 7 European source markets\*



|            | Resting | Nature | Culinary | City | Castles | Wellness | Hiking | Sustain. | Culture | Locals | Immers. | Architec. | Sightsee. | Entertain. | Countrys. | Shopping | Unesco | Nightlife | Family | Events | Sports | Cycling | Wine | Industry | Rememb. | Camping | Learning | Adventu. | Luxury | Film loc. | MTB  | Train | Motocycl. |      |
|------------|---------|--------|----------|------|---------|----------|--------|----------|---------|--------|---------|-----------|-----------|------------|-----------|----------|--------|-----------|--------|--------|--------|---------|------|----------|---------|---------|----------|----------|--------|-----------|------|-------|-----------|------|
| Resting    |         | 0.92   | 0.98     | 0.91 | 0.85    | 0.95     | 0.89   | 0.96     | 0.84    | 0.91   | 0.92    | 0.89      | 0.92      | 0.96       | 0.93      | 0.92     | 0.83   | 0.90      | 0.99   | 0.92   | 0.92   | 0.84    | 0.96 | 0.83     | 0.83    | 0.93    | 0.94     | 0.95     | 0.91   | 0.90      | 0.75 | 0.91  | 0.88      |      |
| Nature     | 0.92    |        | 0.94     | 0.93 | 0.92    | 0.85     | 0.99   | 0.95     | 0.89    | 0.93   | 0.95    | 0.93      | 0.94      | 0.89       | 0.98      | 0.82     | 0.89   | 0.83      | 0.94   | 0.86   | 0.89   | 0.91    | 0.95 | 0.88     | 0.90    | 0.97    | 0.94     | 0.86     | 0.81   | 0.85      | 0.77 | 0.95  | 0.82      |      |
| Culinary   | 0.98    | 0.94   |          | 0.95 | 0.90    | 0.93     | 0.89   | 0.98     | 0.88    | 0.94   | 0.95    | 0.92      | 0.95      | 0.96       | 0.93      | 0.91     | 0.87   | 0.92      | 0.99   | 0.93   | 0.89   | 0.83    | 0.98 | 0.87     | 0.88    | 0.93    | 0.96     | 0.92     | 0.90   | 0.92      | 0.71 | 0.94  | 0.85      |      |
| City       | 0.91    | 0.93   | 0.95     |      | 0.95    | 0.87     | 0.87   | 0.96     | 0.96    | 0.95   | 0.96    | 0.98      | 0.99      | 0.91       | 0.88      | 0.87     | 0.94   | 0.91      | 0.93   | 0.95   | 0.84   | 0.77    | 0.96 | 0.95     | 0.95    | 0.87    | 0.96     | 0.88     | 0.86   | 0.94      | 0.66 | 0.97  | 0.81      |      |
| Castles    | 0.85    | 0.92   | 0.90     | 0.95 |         | 0.74     | 0.90   | 0.92     | 0.99    | 0.92   | 0.95    | 0.99      | 0.97      | 0.81       | 0.88      | 0.74     | 0.99   | 0.79      | 0.87   | 0.86   | 0.78   | 0.80    | 0.91 | 0.98     | 0.98    | 0.86    | 0.93     | 0.78     | 0.73   | 0.86      | 0.63 | 0.96  | 0.71      |      |
| Wellness   | 0.95    | 0.85   | 0.93     | 0.87 | 0.74    |          | 0.78   | 0.91     | 0.74    | 0.83   | 0.84    | 0.81      | 0.85      | 0.97       | 0.84      | 0.97     | 0.72   | 0.84      | 0.96   | 0.91   | 0.89   | 0.76    | 0.90 | 0.74     | 0.94    | 0.76    | 0.86     | 0.88     | 0.95   | 0.98      | 0.90 | 0.71  | 0.84      | 0.87 |
| Hiking     | 0.89    | 0.99   | 0.89     | 0.87 | 0.90    | 0.78     |        | 0.92     | 0.87    | 0.90   | 0.92    | 0.90      | 0.91      | 0.83       | 0.97      | 0.73     | 0.88   | 0.76      | 0.90   | 0.81   | 0.89   | 0.95    | 0.90 | 0.86     | 0.88    | 0.96    | 0.91     | 0.83     | 0.73   | 0.80      | 0.85 | 0.92  | 0.84      |      |
| Sustain.   | 0.96    | 0.95   | 0.98     | 0.96 | 0.92    | 0.91     | 0.92   |          | 0.91    | 0.96   | 0.97    | 0.95      | 0.97      | 0.94       | 0.94      | 0.90     | 0.90   | 0.92      | 0.97   | 0.96   | 0.91   | 0.85    | 0.97 | 0.91     | 0.92    | 0.94    | 0.98     | 0.93     | 0.89   | 0.94      | 0.75 | 0.97  | 0.88      |      |
| Culture    | 0.84    | 0.89   | 0.88     | 0.96 | 0.99    | 0.74     | 0.87   | 0.91     |         | 0.92   | 0.95    | 0.99      | 0.97      | 0.80       | 0.85      | 0.75     | 0.99   | 0.81      | 0.86   | 0.87   | 0.76   | 0.75    | 0.91 | 0.98     | 0.98    | 0.83    | 0.92     | 0.78     | 0.74   | 0.88      | 0.61 | 0.96  | 0.72      |      |
| Locals     | 0.91    | 0.93   | 0.94     | 0.95 | 0.92    | 0.83     | 0.90   | 0.96     | 0.92    |        | 1.00    | 0.95      | 0.96      | 0.88       | 0.92      | 0.82     | 0.91   | 0.88      | 0.92   | 0.91   | 0.85   | 0.81    | 0.96 | 0.91     | 0.92    | 0.90    | 0.97     | 0.87     | 0.81   | 0.89      | 0.69 | 0.95  | 0.83      |      |
| Immers.    | 0.92    | 0.95   | 0.95     | 0.96 | 0.95    | 0.84     | 0.92   | 0.97     | 0.95    | 1.00   |         | 0.97      | 0.98      | 0.89       | 0.93      | 0.84     | 0.94   | 0.87      | 0.93   | 0.92   | 0.85   | 0.83    | 0.97 | 0.94     | 0.94    | 0.91    | 0.98     | 0.87     | 0.82   | 0.90      | 0.70 | 0.97  | 0.83      |      |
| Architec.  | 0.89    | 0.93   | 0.92     | 0.98 | 0.99    | 0.81     | 0.90   | 0.95     | 0.99    | 0.95   | 0.97    |           | 0.99      | 0.86       | 0.89      | 0.80     | 0.98   | 0.85      | 0.91   | 0.90   | 0.81   | 0.80    | 0.95 | 0.98     | 0.98    | 0.88    | 0.95     | 0.84     | 0.79   | 0.91      | 0.66 | 0.98  | 0.78      |      |
| Sightsee.  | 0.92    | 0.94   | 0.95     | 0.99 | 0.97    | 0.85     | 0.91   | 0.97     | 0.97    | 0.96   | 0.98    | 0.99      |           | 0.89       | 0.92      | 0.84     | 0.96   | 0.88      | 0.93   | 0.93   | 0.85   | 0.83    | 0.97 | 0.96     | 0.96    | 0.91    | 0.97     | 0.87     | 0.83   | 0.92      | 0.69 | 0.99  | 0.81      |      |
| Entertain. | 0.96    | 0.89   | 0.96     | 0.91 | 0.81    | 0.97     | 0.83   | 0.94     | 0.80    | 0.88   | 0.89    | 0.86      | 0.89      |            | 0.86      | 0.97     | 0.79   | 0.79      | 0.96   | 0.97   | 0.95   | 0.91    | 0.79 | 0.94     | 0.80    | 0.82    | 0.89     | 0.93     | 0.98   | 0.97      | 0.93 | 0.89  | 0.91      |      |
| Countrys.  | 0.93    | 0.98   | 0.93     | 0.88 | 0.88    | 0.84     | 0.97   | 0.94     | 0.85    | 0.92   | 0.93    | 0.89      | 0.92      | 0.86       |           | 0.79     | 0.87   | 0.93      | 0.93   | 0.84   | 0.91   | 0.93    | 0.92 | 0.84     | 0.79    | 0.98    | 0.87     | 0.78     | 0.82   | 0.92      | 0.82 | 0.92  | 0.86      |      |
| Shopping   | 0.92    | 0.82   | 0.91     | 0.87 | 0.74    | 0.97     | 0.73   | 0.90     | 0.75    | 0.82   | 0.84    | 0.80      | 0.84      | 0.97       | 0.79      |          | 0.73   | 0.96      | 0.93   | 0.94   | 0.86   | 0.69    | 0.89 | 0.76     | 0.77    | 0.81    | 0.87     | 0.94     | 0.99   | 0.92      | 0.65 | 0.83  | 0.87      |      |
| Unesco     | 0.83    | 0.89   | 0.87     | 0.94 | 0.99    | 0.72     | 0.88   | 0.90     | 0.99    | 0.91   | 0.94    | 0.98      | 0.96      | 0.79       | 0.87      | 0.73     |        | 0.78      | 0.84   | 0.85   | 0.76   | 0.77    | 0.91 | 0.98     | 0.98    | 0.83    | 0.91     | 0.77     | 0.71   | 0.86      | 0.62 | 0.96  | 0.72      |      |
| Nightlife  | 0.90    | 0.83   | 0.92     | 0.91 | 0.79    | 0.94     | 0.76   | 0.92     | 0.81    | 0.88   | 0.87    | 0.85      | 0.88      | 0.96       | 0.79      | 0.96     | 0.78   |           | 0.93   | 0.98   | 0.86   | 0.69    | 0.91 | 0.82     | 0.82    | 0.82    | 0.93     | 0.94     | 0.95   | 0.96      | 0.64 | 0.87  | 0.87      |      |
| Family     | 0.99    | 0.94   | 0.99     | 0.93 | 0.87    | 0.96     | 0.90   | 0.97     | 0.86    | 0.92   | 0.93    | 0.91      | 0.93      | 0.97       | 0.93      | 0.93     | 0.84   | 0.93      |        | 0.94   | 0.93   | 0.85    | 0.97 | 0.85     | 0.87    | 0.94    | 0.95     | 0.95     | 0.93   | 0.93      | 0.78 | 0.93  | 0.91      |      |
| Events     | 0.92    | 0.86   | 0.93     | 0.95 | 0.86    | 0.91     | 0.81   | 0.96     | 0.87    | 0.91   | 0.92    | 0.90      | 0.93      | 0.95       | 0.84      | 0.94     | 0.85   | 0.98      | 0.94   |        | 0.87   | 0.74    | 0.93 | 0.88     | 0.88    | 0.85    | 0.96     | 0.95     | 0.93   | 0.98      | 0.67 | 0.91  | 0.88      |      |
| Sports     | 0.92    | 0.89   | 0.89     | 0.84 | 0.78    | 0.89     | 0.89   | 0.91     | 0.76    | 0.85   | 0.85    | 0.81      | 0.85      | 0.91       | 0.91      | 0.86     | 0.76   | 0.86      | 0.93   | 0.87   |        | 0.92    | 0.88 | 0.76     | 0.77    | 0.96    | 0.90     | 0.95     | 0.84   | 0.85      | 0.93 | 0.85  | 0.95      |      |
| Cycling    | 0.84    | 0.91   | 0.83     | 0.77 | 0.80    | 0.76     | 0.95   | 0.85     | 0.75    | 0.81   | 0.83    | 0.80      | 0.83      | 0.79       | 0.93      | 0.69     | 0.77   | 0.69      | 0.85   | 0.74   | 0.92   |         | 0.82 | 0.75     | 0.77    | 0.94    | 0.84     | 0.83     | 0.69   | 0.72      | 0.95 | 0.85  | 0.85      |      |
| Wine       | 0.96    | 0.95   | 0.98     | 0.96 | 0.91    | 0.90     | 0.90   | 0.97     | 0.91    | 0.96   | 0.97    | 0.95      | 0.97      | 0.94       | 0.92      | 0.89     | 0.91   | 0.91      | 0.97   | 0.93   | 0.88   | 0.82    |      | 0.91     | 0.92    | 0.91    | 0.96     | 0.90     | 0.88   | 0.92      | 0.72 | 0.96  | 0.86      |      |
| Industry   | 0.83    | 0.88   | 0.87     | 0.95 | 0.98    | 0.74     | 0.86   | 0.91     | 0.98    | 0.91   | 0.94    | 0.98      | 0.96      | 0.80       | 0.84      | 0.76     | 0.98   | 0.82      | 0.85   | 0.88   | 0.76   | 0.75    | 0.91 |          | 0.99    | 0.83    | 0.93     | 0.79     | 0.74   | 0.91      | 0.60 | 0.95  | 0.72      |      |
| Rememb.    | 0.83    | 0.90   | 0.88     | 0.95 | 0.98    | 0.76     | 0.88   | 0.92     | 0.98    | 0.92   | 0.94    | 0.98      | 0.96      | 0.82       | 0.87      | 0.77     | 0.98   | 0.82      | 0.87   | 0.88   | 0.77   | 0.77    | 0.92 | 0.99     |         | 0.85    | 0.93     | 0.80     | 0.76   | 0.90      | 0.63 | 0.95  | 0.74      |      |
| Camping    | 0.93    | 0.97   | 0.93     | 0.87 | 0.86    | 0.86     | 0.96   | 0.94     | 0.83    | 0.90   | 0.91    | 0.88      | 0.91      | 0.89       | 0.87      | 0.81     | 0.83   | 0.82      | 0.94   | 0.85   | 0.96   | 0.94    | 0.91 | 0.83     | 0.85    |         | 0.93     | 0.90     | 0.81   | 0.85      | 0.87 | 0.91  | 0.90      |      |
| Learning   | 0.94    | 0.94   | 0.96     | 0.96 | 0.93    | 0.88     | 0.91   | 0.98     | 0.92    | 0.97   | 0.98    | 0.95      | 0.97      | 0.93       | 0.93      | 0.87     | 0.91   | 0.93      | 0.95   | 0.96   | 0.90   | 0.84    | 0.96 | 0.93     | 0.93    | 0.93    |          | 0.92     | 0.86   | 0.95      | 0.75 | 0.97  | 0.88      |      |
| Adventu.   | 0.95    | 0.86   | 0.92     | 0.88 | 0.78    | 0.95     | 0.83   | 0.93     | 0.78    | 0.87   | 0.87    | 0.84      | 0.87      | 0.98       | 0.87      | 0.94     | 0.77   | 0.94      | 0.95   | 0.95   | 0.95   | 0.83    | 0.90 | 0.79     | 0.80    | 0.90    | 0.92     |          | 0.93   | 0.93      | 0.81 | 0.87  | 0.96      |      |
| Luxury     | 0.91    | 0.81   | 0.90     | 0.86 | 0.73    | 0.98     | 0.73   | 0.89     | 0.74    | 0.81   | 0.82    | 0.79      | 0.83      | 0.97       | 0.78      | 0.99     | 0.71   | 0.95      | 0.93   | 0.93   | 0.84   | 0.69    | 0.88 | 0.74     | 0.76    | 0.81    | 0.86     | 0.93     |        | 0.91      | 0.65 | 0.82  | 0.85      |      |
| Film loc.  | 0.90    | 0.85   | 0.92     | 0.94 | 0.86    | 0.90     | 0.80   | 0.94     | 0.88    | 0.89   | 0.90    | 0.91      | 0.92      | 0.93       | 0.82      | 0.92     | 0.86   | 0.96      | 0.93   | 0.98   | 0.85   | 0.72    | 0.92 | 0.91     | 0.90    | 0.85    | 0.95     | 0.93     | 0.91   |           | 0.63 | 0.92  | 0.84      |      |
| MTB        | 0.75    | 0.77   | 0.71     | 0.66 | 0.63    | 0.71     | 0.85   | 0.75     | 0.61    | 0.69   | 0.70    | 0.66      | 0.69      | 0.73       | 0.82      | 0.65     | 0.62   | 0.64      | 0.78   | 0.67   | 0.93   | 0.95    | 0.72 | 0.60     | 0.63    | 0.87    | 0.75     | 0.81     | 0.65   | 0.63      |      | 0.71  | 0.87      |      |
| Train      | 0.91    | 0.95   | 0.94     | 0.97 | 0.96    | 0.84     | 0.92   | 0.97     | 0.96    | 0.95   | 0.97    | 0.98      | 0.99      | 0.89       | 0.92      | 0.83     | 0.96   | 0.87      | 0.93   | 0.91   | 0.85   | 0.85    | 0.96 | 0.95     | 0.95    | 0.91    | 0.97     | 0.87     | 0.82   | 0.92      | 0.71 |       | 0.82      |      |
| Motocycl.  | 0.88    | 0.82   | 0.85     | 0.81 | 0.71    | 0.87     | 0.84   | 0.88     | 0.72    | 0.83   | 0.83    | 0.78      | 0.81      | 0.91       | 0.86      | 0.87     | 0.72   | 0.87      | 0.91   | 0.88   | 0.95   | 0.85    | 0.86 | 0.72     | 0.74    | 0.90    | 0.88     | 0.96     | 0.85   | 0.84      | 0.87 | 0.82  |           |      |

These results indicate to what extent respondents interested in one particular theme are also interested in other themes as part of their holidays in general. Strongest correlations are shown in green, weakest are shown in red.

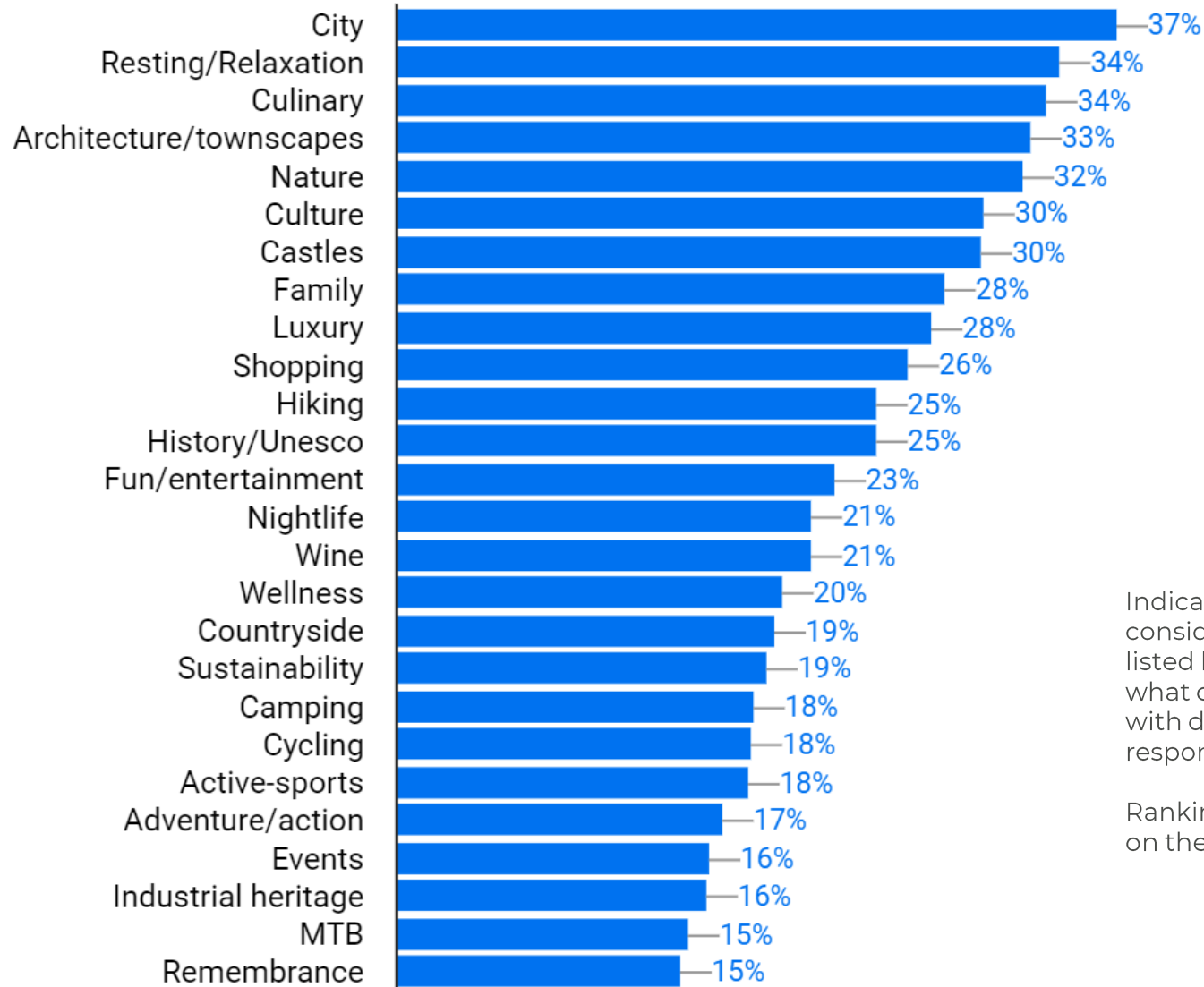
\* DE-FR-BE-NL-UK-CH-AT



# 3b Luxembourg's Theme Suitability

# Luxembourg's Theme Suitability

 — Average 14 European source markets



Indicates the share of respondents that consider Luxembourg suitable for the listed holiday themes & experiences, i.e.. to what degree those themes are associated with destination Luxembourg in respondents' perceptions.

Rankings by source markets are presented on the following page.

# Luxembourg's Theme Suitability - Ranking by Source Markets

Average Europe



| City                    | 1  | 2  | 7  | 1  | 1  | 1  | 1  | 1  | 9  | 1  | 8  | 2  | 2  | 1  | 2  |
|-------------------------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| Resting/Relaxation      | 2  | 8  | 3  | 2  | 4  | 5  | 3  | 4  | 3  |    | 2  | 4  | 4  | 2  | 5  |
| Culinary                | 3  | 1  | 6  | 3  | 8  | 2  | 2  | 9  | 8  | 5  | 4  | 7  | 1  | 3  | 3  |
| Architecture/townscapes | 4  | 3  | 8  |    | 5  | 3  |    |    | 7  |    |    |    |    | 4  | 1  |
| Nature                  | 5  | 7  | 1  | 6  | 9  | 4  | 6  | 6  | 1  | 8  | 7  | 5  | 11 | 5  | 4  |
| Culture                 | 6  | 4  | 11 | 6  | 7  | 8  | 4  | 3  | 13 | 3  | 3  | 3  | 5  | 7  | 6  |
| Castles                 | 7  | 5  | 5  | 10 | 12 | 6  | 9  | 2  | 5  | 2  | 9  | 1  | 8  | 8  | 8  |
| Family                  | 8  | 10 | 4  | 5  | 2  | 10 | 8  | 13 | 4  | 7  | 1  | 13 | 6  | 9  | 9  |
| Luxury                  | 9  | 5  | 18 |    | 3  | 9  |    |    | 16 |    |    |    |    | 6  | 7  |
| Shopping                | 10 | 9  | 10 | 4  | 6  | 7  | 5  | 9  | 19 | 4  | 13 | 9  | 3  | 10 | 11 |
| Hiking                  | 11 | 16 | 2  | 16 | 15 | 14 | 19 | 5  | 2  | 6  | 12 | 12 | 15 | 19 | 10 |
| History/Unesco          | 12 | 11 | 17 | 9  | 13 | 11 | 7  | 6  | 18 |    | 6  | 6  | 9  | 13 | 12 |
| Fun/entertainment       | 13 | 12 | 20 |    | 10 | 13 |    |    | 17 |    |    |    |    | 11 | 13 |
| Nightlife               | 14 | 13 | 25 | 8  | 11 | 17 | 10 | 9  | 23 |    | 11 | 9  | 7  | 12 | 16 |
| Wine                    | 15 | 14 | 13 | 11 | 19 | 12 | 11 |    | 20 |    | 15 |    | 10 | 15 | 15 |
| Wellness                | 16 | 19 | 22 | 12 | 17 | 19 | 12 | 12 | 22 |    | 5  | 9  | 14 | 17 | 18 |
| Countryside             | 17 | 23 | 14 | 15 | 24 | 20 | 14 |    | 15 |    | 14 |    | 12 | 21 | 14 |
| Sustainability          | 18 | 20 | 21 | 14 | 20 | 18 | 13 |    | 21 |    | 10 |    | 13 | 23 | 21 |
| Camping                 | 19 | 24 | 12 | 18 | 25 | 20 | 18 |    | 6  |    | 17 |    | 17 | 22 | 20 |
| Cycling                 | 20 | 18 | 9  | 19 | 16 | 15 | 17 | 8  | 11 | 9  | 20 | 8  | 19 | 24 | 25 |
| Active-sports           | 21 | 15 | 16 | 17 | 18 | 16 | 15 | 14 | 12 | 10 | 18 | 15 | 16 | 16 | 24 |
| Adventure/action        | 22 | 21 | 19 |    | 23 | 24 |    |    | 14 |    |    |    |    | 25 | 22 |
| Events                  | 23 | 17 | 26 |    | 14 | 22 |    |    | 26 |    |    |    |    | 14 | 19 |
| Industrial heritage     | 24 | 25 | 24 | 13 | 21 | 25 | 16 |    | 25 |    | 16 |    | 18 | 20 | 17 |
| MTB                     | 25 | 26 | 15 | 20 | 26 | 26 | 20 | 15 | 10 |    | 19 | 14 | 20 | 26 | 26 |
| Remembrance             | 26 | 22 | 23 |    | 22 | 23 |    |    | 24 |    |    |    |    | 18 | 23 |

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Insp ektour.

# Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Average **14 European source markets** (see full study report for individual source markets)

| Theme                   | General Interest | Luxembourg's Suitability perception |
|-------------------------|------------------|-------------------------------------|
| Resting/Relaxation      | 1                | 2                                   |
| Culinary                | 2                | 3                                   |
| Nature                  | 3                | 5                                   |
| City                    | 4                | 1                                   |
| Architecture/townscapes | 5                | 4                                   |
| Fun/entertainment       | 6                | 13                                  |
| Castles                 | 7                | 7                                   |
| History/Unesco          | 8                | 12                                  |
| Culture                 | 9                | 6                                   |
| Family                  | 10               | 8                                   |
| Sustainability          | 11               | 18                                  |
| Events                  | 12               | 23                                  |
| Hiking                  | 13               | 11                                  |
| Adventure/action        | 14               | 22                                  |
| Nightlife               | 15               | 14                                  |
| Wine                    | 16               | 15                                  |
| Countryside             | 17               | 17                                  |
| Shopping                | 18               | 10                                  |
| Luxury                  | 19               | 9                                   |
| Wellness                | 20               | 16                                  |
| Remembrance             | 21               | 26                                  |
| Active-sports           | 22               | 21                                  |
| Industrial heritage     | 23               | 24                                  |
| Camping                 | 24               | 19                                  |
| Cycling                 | 25               | 20                                  |
| MTB                     | 26               | 25                                  |

Comparing general theme interest levels with levels of association of those themes with destination Luxembourg allows to identify perception gaps. This can be presented in the form of rankings.

Theme suitability perception levels reflect strengths and deficits of either theme awareness or theme products in the destination. Whether a theme deserves a marketing focus to either capitalise on its positive theme perception, or improve its negative theme perception, will depend on the overall theme interest levels (if too low, specific measures may not be advisable for this particular theme).

A similar analysis has also been carried out by LFT target segments (see page 32).

# Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Average **14 European source markets** – Past and future visitors

| Theme                   | General Interest |                  |                  | Luxembourg's Suitability perception |                  |                  |
|-------------------------|------------------|------------------|------------------|-------------------------------------|------------------|------------------|
|                         | Past Visitors    | Future Visitors* | Total population | Past Visitors                       | Future Visitors* | Total population |
| Culinary                | 1                | 1                | <b>1</b>         | 4                                   | 3                | <b>3</b>         |
| Resting/Relaxation      | 3                | 3                | <b>2</b>         | 3                                   | 4                | <b>2</b>         |
| Nature                  | 2                | 2                | <b>3</b>         | 2                                   | 5                | <b>5</b>         |
| City                    | 5                | 4                | 4                | 1                                   | 1                | <b>1</b>         |
| Architecture/townscapes | 4                | 5                | <b>5</b>         | 6                                   | 2                | <b>4</b>         |
| Fun/entertainment       | 9                | 7                | <b>6</b>         | 13                                  | 11               | <b>13</b>        |
| Castles                 | 6                | 8                | <b>7</b>         | 5                                   | 7                | <b>7</b>         |
| History/Unesco          | 8                | 6                | <b>8</b>         | 12                                  | 10               | <b>12</b>        |
| Culture                 | 7                | 9                | <b>9</b>         | 7                                   | 6                | <b>6</b>         |
| Family                  | 10               | 10               | <b>10</b>        | 8                                   | 8                | <b>8</b>         |
| Sustainability          | 11               | 11               | <b>11</b>        | 22                                  | 16               | <b>18</b>        |
| Events                  | 13               | 12               | 12               | 21                                  | 22               | <b>23</b>        |
| Hiking                  | 12               | 13               | <b>13</b>        | 10                                  | 13               | <b>11</b>        |
| Nightlife               | 16               | 15               | 14               | 15                                  | 14               | <b>14</b>        |
| Adventure/action        | 17               | 14               | 15               | 24                                  | 18               | <b>22</b>        |
| Countryside             | 15               | 17               | <b>16</b>        | 18                                  | 19               | <b>17</b>        |
| Wine                    | 14               | 18               | <b>17</b>        | 14                                  | 15               | <b>15</b>        |
| Shopping                | 18               | 16               | <b>18</b>        | 9                                   | 12               | <b>10</b>        |
| Luxury                  | 19               | 19               | <b>19</b>        | 11                                  | 9                | <b>9</b>         |
| Wellness                | 21               | 20               | 20               | 16                                  | 17               | <b>16</b>        |
| Remembrance             | 20               | 21               | <b>21</b>        | 26                                  | 25               | <b>26</b>        |
| Industrial heritage     | 22               | 22               | <b>22</b>        | 23                                  | 24               | <b>24</b>        |
| Active-sports           | 23               | 23               | <b>23</b>        | 17                                  | 20               | <b>21</b>        |
| Camping                 | 24               | 25               | <b>24</b>        | 20                                  | 21               | <b>19</b>        |
| Cycling                 | 25               | 24               | <b>25</b>        | 19                                  | 23               | <b>20</b>        |
| MTB                     | 26               | 26               | <b>26</b>        | 25                                  | 26               | <b>25</b>        |

It is also meaningful to compare theme interest and Luxembourg's theme suitability levels between past visitors and new potential visitors: future visitors may show more or less interest in some themes than past visitors, reflecting changing travel preferences.

Furthermore, new potential visitors may associate some themes more or less with Luxembourg than past visitors: this is either due to shifting motives for travelling to Luxembourg, or to deficits in theme perception by new potential visitors (if Suitability rankings of Future Visitors are lower). It may also be due to relative weakness of Luxembourg's offer for those themes (if Suitability rankings of Past Visitors are lower).

A similar analysis has also been carried out for each source market (see page 63 ff. in the full study report).

\* Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

# Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Average **14 European source markets** – LFT target segments  
(see full study report for individual source markets)



| Theme                   | General Interest |     |    |    |    |    |            | Luxembourg's Suitability perception |     |    |    |    |    |            |
|-------------------------|------------------|-----|----|----|----|----|------------|-------------------------------------|-----|----|----|----|----|------------|
|                         | EXP              | NLA | RS | SB | PS | LO | Total pop. | EXP                                 | NLA | RS | SB | PS | LO | Total pop. |
| Culinary                | 2                | 2   | 2  | 2  | 2  | 2  | 1          | 5                                   | 6   | 3  | 3  | 3  | 3  | 3          |
| Resting/Relaxation      | 5                | 4   | 1  | 1  | 1  | 1  | 2          | 7                                   | 4   | 1  | 4  | 4  | 2  | 2          |
| Nature                  | 1                | 1   | 3  | 3  | 3  | 3  | 3          | 4                                   | 1   | 5  | 2  | 7  | 4  | 5          |
| City                    | 4                | 11  | 6  | 5  | 6  | 6  | 4          | 1                                   | 2   | 2  | 1  | 2  | 1  | 1          |
| Architecture/townscapes | 3                | 5   | 7  | 4  | 5  | 5  | 5          | 2                                   | 8   | 4  | 5  | 1  | 6  | 4          |
| Fun/entertainment       | 9                | 14  | 4  | 9  | 4  | 7  | 6          | 13                                  | 23  | 13 | 14 | 6  | 13 | 13         |
| Castles                 | 8                | 8   | 11 | 10 | 15 | 11 | 7          | 6                                   | 3   | 7  | 8  | 10 | 8  | 7          |
| History/Unesco          | 6                | 9   | 9  | 7  | 14 | 8  | 8          | 8                                   | 10  | 12 | 12 | 12 | 12 | 12         |
| Culture                 | 7                | 13  | 8  | 8  | 10 | 9  | 9          | 3                                   | 7   | 6  | 7  | 11 | 7  | 6          |
| Family                  | 10               | 12  | 5  | 6  | 7  | 4  | 10         | 10                                  | 9   | 9  | 6  | 9  | 5  | 8          |
| Sustainability          | 11               | 7   | 10 | 11 | 11 | 10 | 11         | 17                                  | 19  | 18 | 20 | 14 | 19 | 18         |
| Events                  | 12               | 15  | 12 | 13 | 9  | 12 | 12         | 23                                  | 25  | 23 | 21 | 17 | 25 | 23         |
| Hiking                  | 13               | 3   | 17 | 12 | 16 | 13 | 13         | 11                                  | 5   | 11 | 9  | 19 | 11 | 11         |
| Nightlife               | 15               | 22  | 15 | 15 | 12 | 16 | 14         | 14                                  | 18  | 16 | 15 | 13 | 14 | 14         |
| Adventure/action        | 14               | 17  | 18 | 17 | 8  | 15 | 15         | 21                                  | 24  | 22 | 24 | 16 | 24 | 22         |
| Countryside             | 17               | 10  | 20 | 14 | 22 | 17 | 16         | 16                                  | 13  | 17 | 19 | 18 | 15 | 17         |
| Wine                    | 16               | 19  | 19 | 16 | 20 | 19 | 17         | 15                                  | 12  | 15 | 13 | 15 | 16 | 15         |
| Shopping                | 21               | 25  | 14 | 18 | 19 | 14 | 18         | 12                                  | 17  | 10 | 11 | 8  | 10 | 10         |
| Luxury                  | 22               | 26  | 13 | 23 | 13 | 20 | 19         | 9                                   | 11  | 8  | 10 | 5  | 9  | 9          |
| Wellness                | 23               | 18  | 16 | 19 | 17 | 18 | 20         | 18                                  | 21  | 14 | 16 | 20 | 17 | 16         |
| Remembrance             | 18               | 24  | 22 | 21 | 21 | 21 | 21         | 25                                  | 26  | 24 | 26 | 23 | 26 | 26         |
| Industrial heritage     | 19               | 21  | 23 | 20 | 24 | 24 | 22         | 24                                  | 22  | 26 | 25 | 22 | 22 | 24         |
| Active-sports           | 20               | 6   | 21 | 22 | 18 | 22 | 23         | 22                                  | 16  | 20 | 18 | 21 | 20 | 21         |
| Camping                 | 24               | 20  | 24 | 24 | 23 | 23 | 24         | 19                                  | 15  | 21 | 17 | 24 | 18 | 19         |
| Cycling                 | 25               | 16  | 25 | 25 | 26 | 25 | 25         | 20                                  | 14  | 19 | 22 | 25 | 21 | 20         |
| MTB                     | 26               | 23  | 26 | 26 | 25 | 26 | 26         | 26                                  | 20  | 25 | 23 | 26 | 23 | 25         |

\* Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.



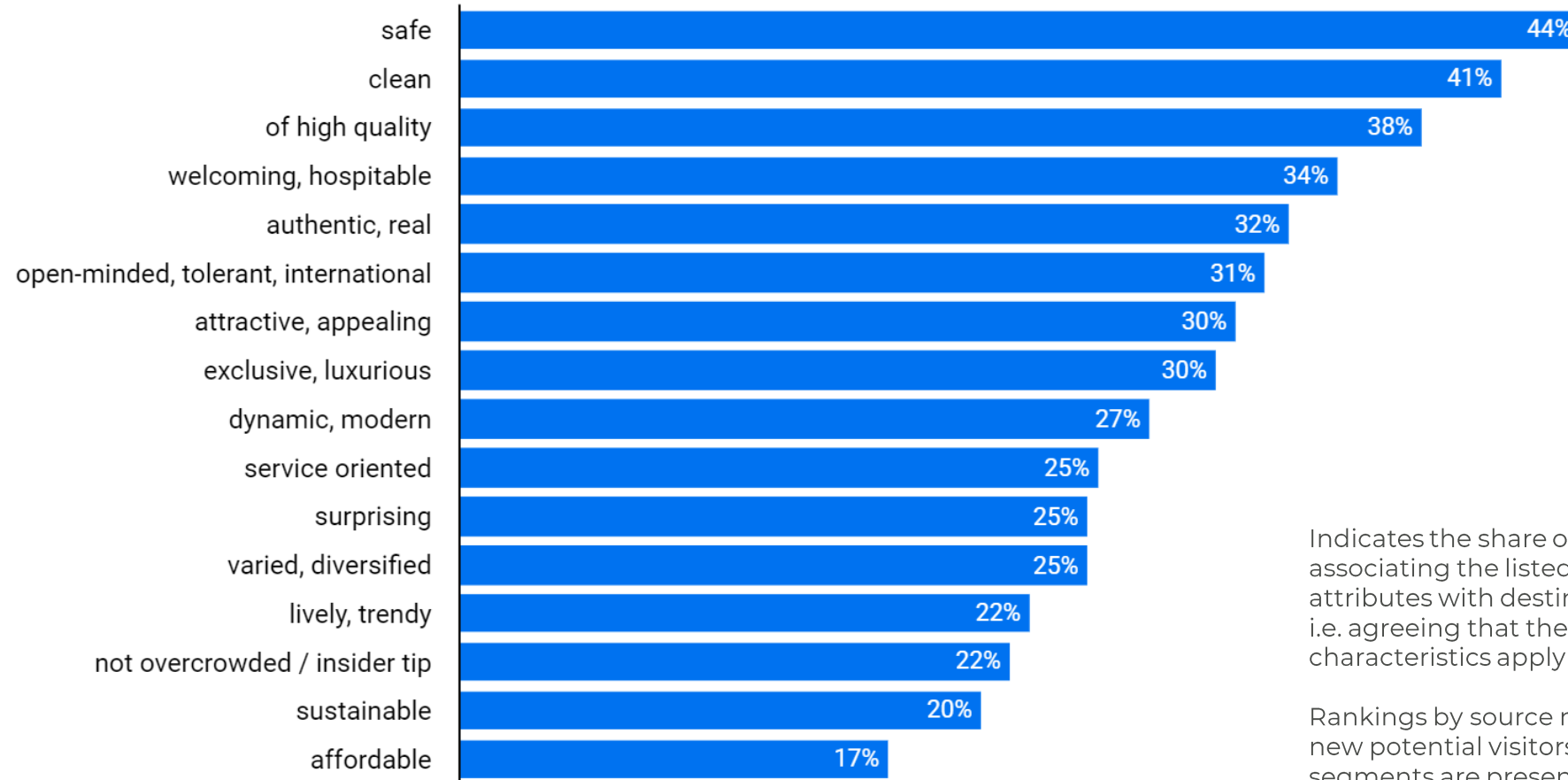


4

# Brand Values

# Luxembourg's Brand Value Ratings

— Average 13 European source markets\*



Indicates the share of respondents associating the listed brand features and attributes with destination Luxembourg, i.e. agreeing that the indicated characteristics apply to Luxembourg.

Rankings by source markets, past visitors, new potential visitors and LFT target segments are presented on the following pages.

\* excl. PL

# Luxembourg's Brand Value Ratings - Ranking by Source Markets



Average Europe



|                                      | Average Europe | Denmark | Belgium | Denmark | France | Germany | Italy | Netherlands | Portugal | Spain | Sweden | Switzerland | United Kingdom |    |
|--------------------------------------|----------------|---------|---------|---------|--------|---------|-------|-------------|----------|-------|--------|-------------|----------------|----|
| safe                                 | 1              | 1       | 2       | 3       | 2      | 1       | 2     |             | 1        | 1     |        | 1           | 1              | 2  |
| clean                                | 2              | 3       | 1       |         | 1      | 2       |       |             | 2        |       |        |             | 2              | 1  |
| of high quality                      | 3              | 2       | 5       | 1       | 3      | 5       | 1     |             | 5        | 2     |        | 3           | 3              | 4  |
| welcoming, hospitable                | 4              | 4       | 3       | 5       | 5      | 3       | 4     | 2           | 3        | 3     | 6      | 2           | 6              | 6  |
| authentic, real                      | 5              | 7       | 4       | 4       | 6      | 6       | 6     | 5           | 4        | 5     | 3      | 6           | 5              | 3  |
| open-minded, tolerant, international | 6              | 5       | 7       | 2       | 4      | 4       | 7     | 5           | 7        | 4     | 1      | 10          | 4              | 7  |
| attractive, appealing                | 7              | 8       | 6       | 7       | 9      | 9       | 3     | 2           | 6        | 7     | 2      | 5           | 8              | 5  |
| exclusive, luxurious                 | 8              | 6       | 11      | 6       | 7      | 8       | 5     |             | 12       | 12    |        | 4           | 7              | 8  |
| dynamic, modern                      | 9              | 10      | 14      | 8       | 8      | 7       | 9     |             | 15       | 6     |        | 8           | 9              | 13 |
| service oriented                     | 10             | 11      | 12      | 9       | 13     | 10      | 11    | 1           | 9        | 9     | 6      | 7           | 10             | 16 |
| surprising                           | 11             | 14      | 8       | 10      | 12     | 12      | 12    | 5           | 8        | 8     | 4      | 9           | 12             | 9  |
| varied, diversified                  | 12             | 9       | 8       | 12      | 10     | 11      | 10    | 8           | 11       | 10    | 6      | 12          | 11             | 12 |
| lively, trendy                       | 13             | 12      | 16      | 11      | 11     | 13      | 8     | 10          | 14       | 14    | 10     | 11          | 13             | 10 |
| not overcrowded / insider tip        | 14             | 13      | 13      | 13      | 15     | 14      | 13    | 8           | 13       | 13    | 5      | 13          | 14             | 11 |
| sustainable                          | 15             | 15      | 15      | 14      | 16     | 15      | 14    | 2           | 16       | 11    | 6      | 14          | 15             | 14 |
| affordable                           | 16             | 16      | 10      |         | 14     | 16      |       |             | 10       |       |        |             | 16             | 15 |

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

# Ranking Luxembourg's Brand Value Ratings

— Average **13 European source markets\*** – Past and future visitors – LFT target segments  
(see full study report for individual source markets)



| Feature                       | Past Visitors | Future Visitors** | EXP | NLA | RS | SB | PS | LO | Total pop. |
|-------------------------------|---------------|-------------------|-----|-----|----|----|----|----|------------|
| safe                          | 2             | 1                 | 1   | 1   | 1  | 2  | 1  | 1  | 1          |
| clean                         | 1             | 2                 | 2   | 2   | 2  | 1  | 2  | 2  | 2          |
| of high quality               | 4             | 3                 | 3   | 3   | 3  | 3  | 3  | 3  | 3          |
| welcoming                     | 3             | 4                 | 4   | 4   | 4  | 4  | 5  | 4  | 4          |
| authentic                     | 7             | 5                 | 6   | 6   | 5  | 6  | 9  | 5  | 5          |
| open-minded                   | 5             | 7                 | 5   | 7   | 6  | 7  | 7  | 6  | 6          |
| attractive                    | 6             | 6                 | 7   | 5   | 8  | 8  | 6  | 7  | 7          |
| exclusive                     | 9             | 8                 | 8   | 8   | 7  | 5  | 4  | 8  | 8          |
| dynamic                       | 11            | 10                | 9   | 9   | 9  | 9  | 8  | 9  | 9          |
| service oriented              | 8             | 12                | 10  | 12  | 10 | 11 | 10 | 12 | 10         |
| surprising                    | 12            | 11                | 12  | 11  | 12 | 10 | 11 | 10 | 11         |
| varied                        | 10            | 9                 | 11  | 10  | 11 | 13 | 12 | 11 | 12         |
| lively                        | 13            | 13                | 13  | 14  | 13 | 15 | 13 | 13 | 13         |
| not overcrowded / insider tip | 14            | 15                | 14  | 13  | 14 | 12 | 16 | 14 | 14         |
| sustainable                   | 15            | 14                | 15  | 15  | 15 | 14 | 14 | 15 | 15         |
| affordable                    | 16            | 16                | 16  | 16  | 16 | 16 | 15 | 16 | 16         |

Likewise to themes, we can rank brand features perceptions by distinguishing between past and new potential visitors, as well as LFT target segments.

A similar ranking can also be applied by source markets (see full study report for results).

\*\* Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

\* excl. PL

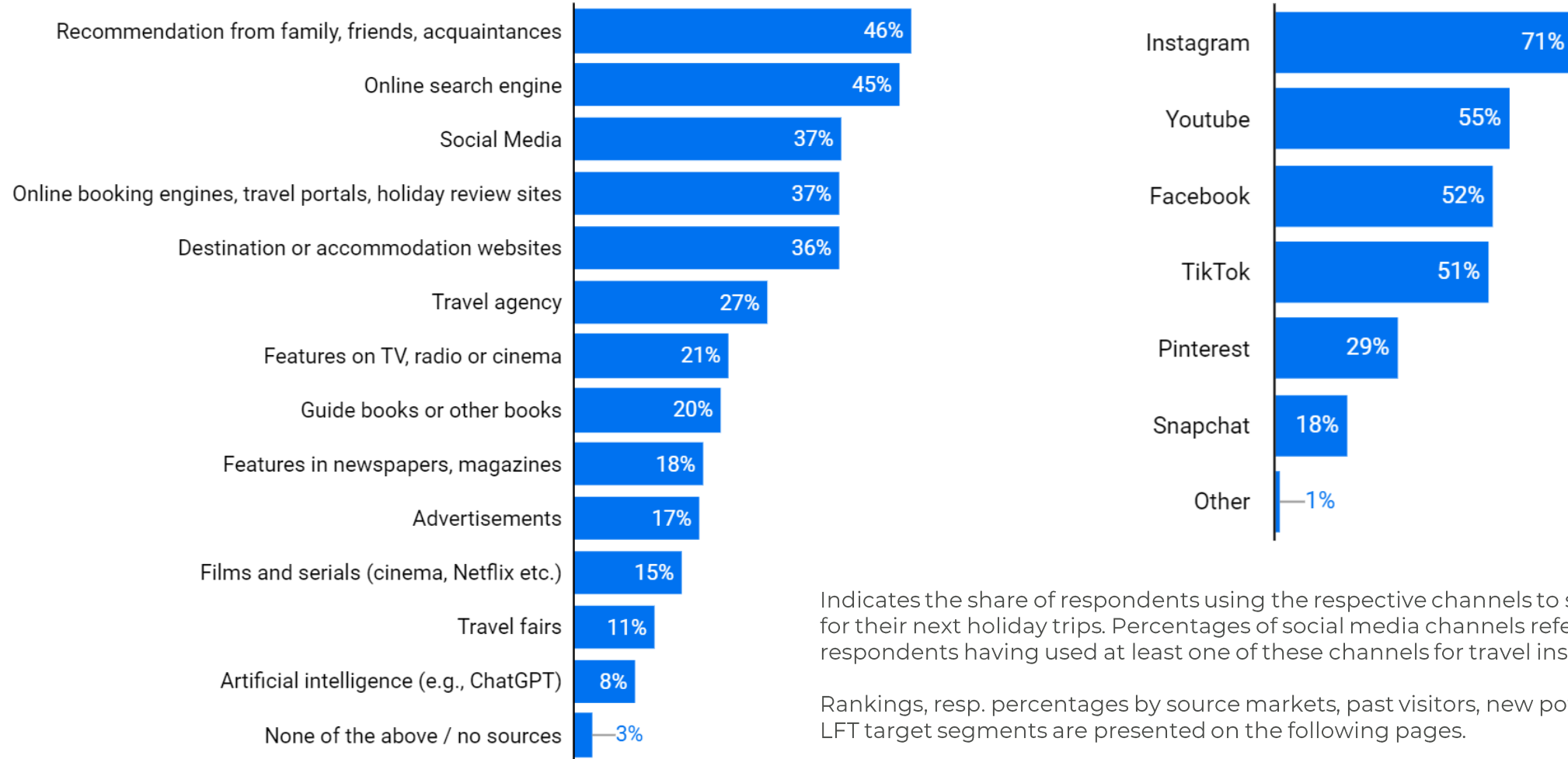


# 5 Travel inspiration

(regardless of specific destinations)  
(not yet available for source markets ES-IT-PL)

# Preferred sources of travel inspiration

🇪🇺 — Average 11 European source markets\*



Indicates the share of respondents using the respective channels to search for inspiration for their next holiday trips. Percentages of social media channels refer to shares of respondents having used at least one of these channels for travel inspiration.

Rankings, resp. percentages by source markets, past visitors, new potential visitors and LFT target segments are presented on the following pages.

\* DE-FR-BE-NL-UK-CH-AT-IE-DK-SE-PT

# Preferred sources of travel inspiration – Ranking by Source Markets

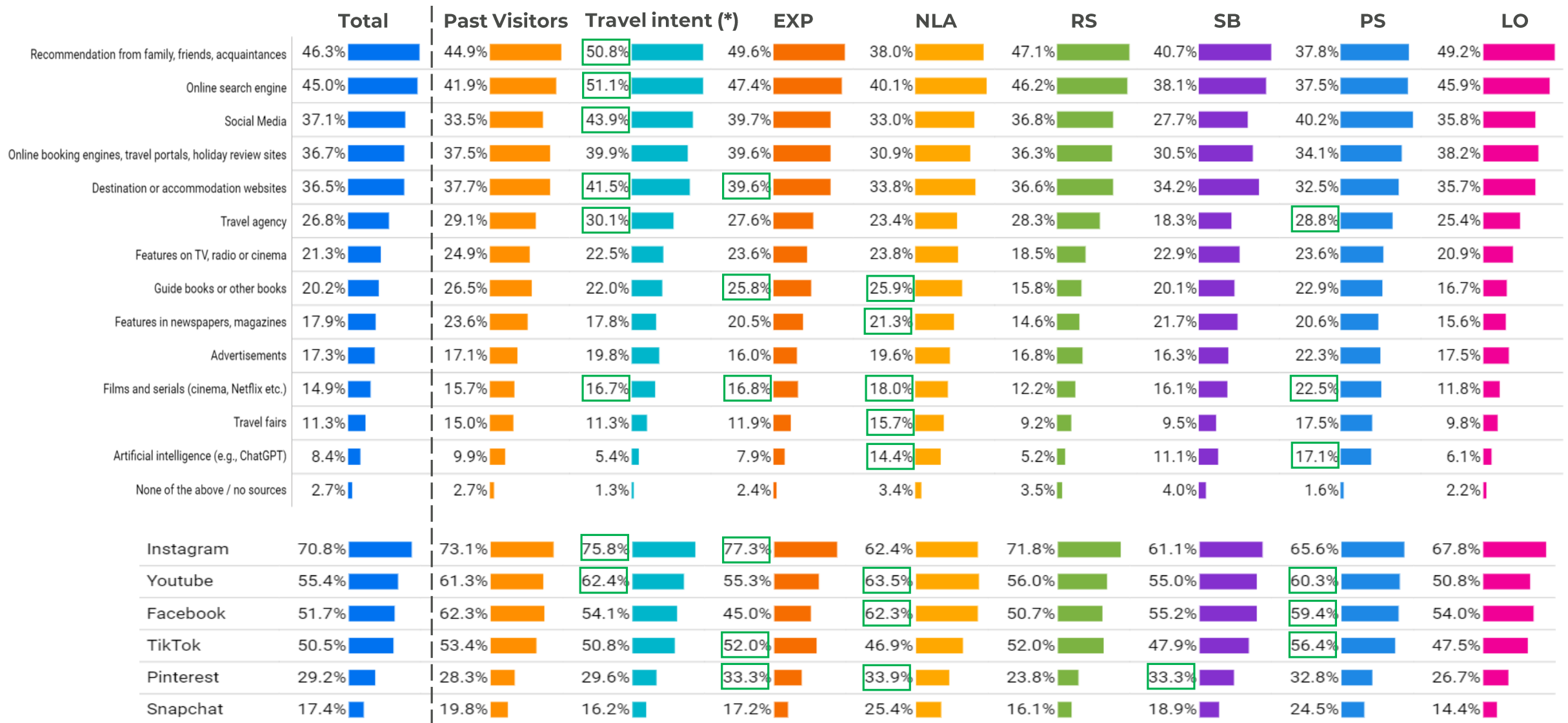


|  |  |  |  |  |  |  |  |  |  |  |  |
|--|---|--|---|---|---|---|---|---|---|---|---|
| Recommendation friends, family                               | 1   | 3  | 1   | 1   | 1   | 2   | 3   | 1   | 2   | 1   | 2   |
| Online search engine   | 2   | 1  | 3   | 2   | 2   | 1   | 1   | 2   | 1   | 2   | 1   |
| Social media   | 5   | 4  | 2   | 4   | 5   | 4   | 5   | 4   | 3   | 5   | 4   |
| Online booking engines, travel portals, holiday review sites | 3   | 5  | 4   | 6   | 3   | 3   | 4   | 6   | 5   | 3   | 3   |
| DMO or accommodation websites                                | 4   | 2  | 5   | 3   | 4   | 5   | 2   | 3   | 4   | 4   | 5   |
| Travel agency  | 6   | 6  | 6   | 8   | 7   | 6   | 7   | 5   | 6   | 6   | 6   |
| TV, radio, cinema  | 7   | 8  | 9   | 5   | 6   | 7   | 10  | 7   | 9   | 8   | 10  |
| Guide books or other books                                   | 8   | 7  | 10  | 7   | 8   | 9   | 6   | 8   | 10  | 9   | 9   |
| Newspapers, magazines  | 9   | 10   | 8   | 9   | 9   | 10  | 9   | 11  | 7   | 7   | 8   |
| Advertisements   | 10  | 9  | 7   | 11  | 11  | 8   | 8   | 9   | 8   | 11  | 7   |
| Films, serials (Netflix etc.)                                | 11  | 11   |   | 10  | 10  |   | 11  |   |   | 10  | 11  |
| Travel fairs   | 12  | 12   | 11  | 12  | 12  | 11  | 12  | 10  | 11  | 13  | 12  |
| Artificial intelligence                                      | 13  |  |   | 13  | 13  |   |   |   |   | 12  | 13  |

|           |   |   |  |   |   |  |   |  |  |   |   |
|-----------|---|---|--|---|---|--|---|--|--|---|---|
| Instagram | 1 | 1 |  | 1 | 1 |  | 1 |  |  | 1 | 1 |
| Youtube   | 2 | 4 |  | 3 | 2 |  | 4 |  |  | 2 | 3 |
| Facebook  | 3 | 3 |  | 4 | 3 |  | 3 |  |  | 4 | 2 |
| TikTok    | 4 | 2 |  | 2 | 4 |  | 2 |  |  | 3 | 4 |
| Pinterest | 5 | 5 |  | 5 | 5 |  | 5 |  |  | 5 | 5 |
| Snapchat  | 6 | 6 |  | 6 | 6 |  | 6 |  |  | 6 | 6 |

# Preferred sources of travel inspiration

— Average 11 European source markets\*, past and future visitors – LFT target segments



\* DE-FR-BE-NL-UK-CH-AT-IE-DK-SE-PT

Travel intent LUX = respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.



# Preferred type of content for travel inspiration

🇪🇺 — Average 11 European source markets\*












Indicates the share of respondents preferring the respective content type when looking for inspiration/information about holiday destinations.

Rankings, resp. percentages by source markets, past visitors, new potential visitors, LFT target segments and further demand indicators are presented on the following pages.

\* DE-FR-BE-NL-UK-CH-AT-IE-DK-SE-PT

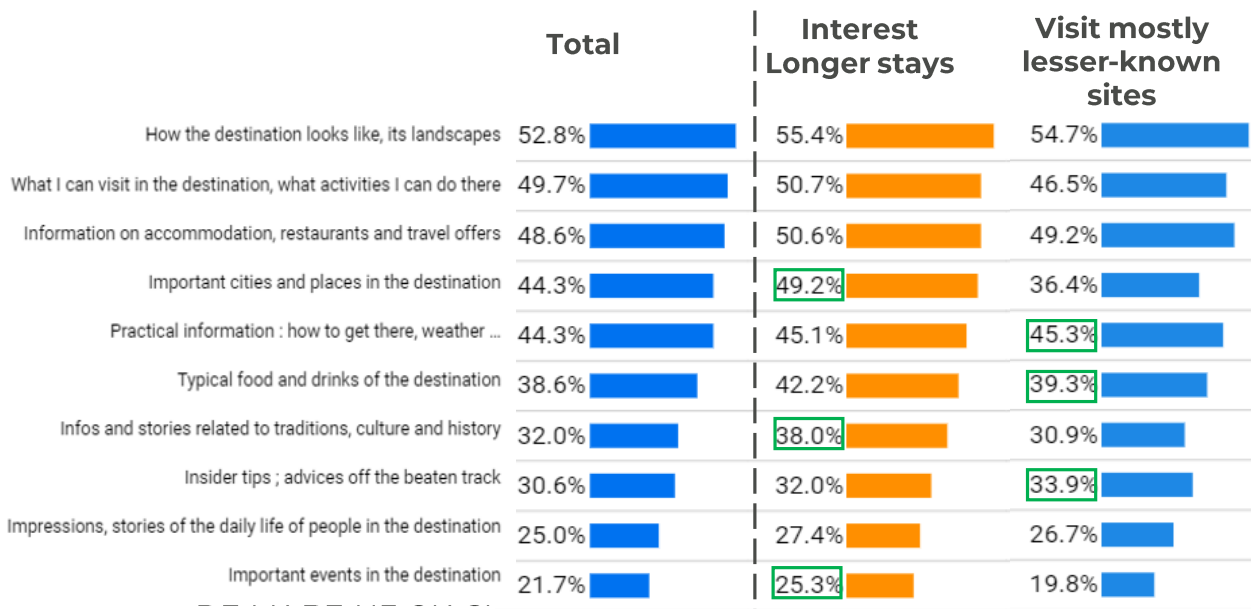
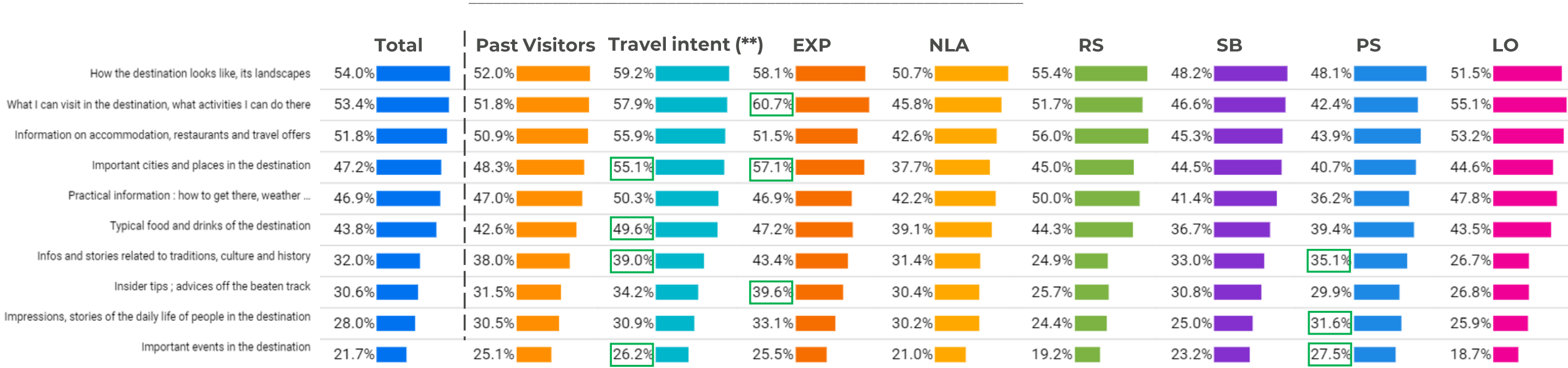
# Preferred type of content for travel inspiration – Ranking by Source Markets



|   |  |  |  |  |  |  |  |  |  |  |  |
|---|---|---|---|---|---|---|---|---|---|---|---|
| How the destination looks like, its landscapes                      | 1   | 1   | 3   | 1   | 1   | 5   | 1   | 3   | 2   | 1   | 3   |
| What I can visit in the destination, what activities I can do there | 3   | 3   | 1   | 2   | 2   | 1   | 3   | 1   | 1   | 2   | 1   |
| Information on accommodation, restaurants and travel offers         | 2   | 2   | 3   | 4   | 3   | 3   | 2   | 2   | 3   | 3   | 2   |
| Important cities and places in the destination                      | 4   | 5   | 2   | 3   | 4   | 6   | 5   | 4   | 5   | 4   | 6   |
| Practical information : how to get there, weather ...               | 5   | 4   | 6   | 5   | 5   | 4   | 4   | 6   | 4   | 5   | 5   |
| Typical food and drinks of the destination                          | 6   | 6   | 5   | 6   | 6   | 2   | 8   | 5   | 6   | 6   | 4   |
| Infos and stories related to traditions, culture and history        | 8   | 8   |   | 7   | 7   |   | 7   |   |   | 7   | 7   |
| Insider tips ; advices off the beaten track                         | 7   | 7   |   | 9   | 8   |   | 6   |   |   | 8   | 8   |
| Impressions, stories of the daily life of people in the destination | 9   | 10  | 7   | 10  | 9   | 7   | 9   | 7   | 7   | 9   | 10  |
| Important events in the destination                                 | 10  | 9   |   | 8   | 10  |   | 10  |   |   | 10  | 9   |

# Preferred type of content for travel inspiration

— Average 11 European source markets\*, past and future visitors – LFT target segments – further demand indicators

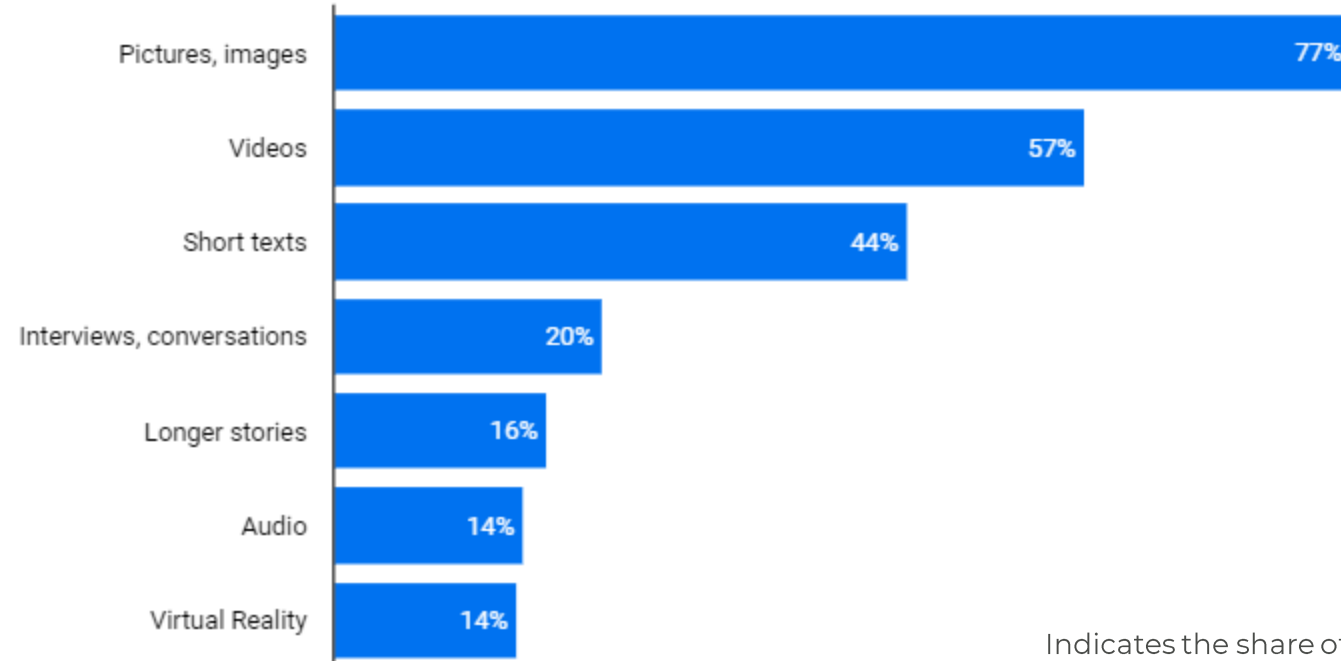


The LFT key target segments and respondents interested in visiting lesser-known sites show the clearest differences with regard to preferences of content for travel inspiration (rather than source markets, past vs. future visitors etc.). Generally, the focus should be on important cities/places, food/drinks, stories, culture/history/traditions, events and (depending on the target group) insider tips.

(\*\*) Travel intent LUX = respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

# Preferred format of content for travel inspiration

 — Average **7 European source markets\***










Indicates the share of respondents preferring the respective content format when looking for inspiration/information about holiday destinations.

Percentages by source markets, past visitors, new potential visitors and LFT target segments are presented on the following page.

\* DE-FR-BE-NL-UK-CH-AT

# Preferred type of format for travel inspiration - Source Markets



|                           |  |  |  |  |  |  |  | Average Europe |
|---------------------------|---|---|---|---|---|---|---|----------------|
| Pictures, images          | 78.2%   | 80.8%   | 76.4%   | 79.7%   | 72.8%   | 75.6%   | 78.7%   | 77.5%          |
| Videos                    | 56.8%   | 55.1%   | 57.1%   | 59.5%   | 52.7%   | 59.6%   | 59.5%   | 57.2%          |
| Short texts               | 46.8%   | 45.3%   | 34.4%   | 50.1%   | 51.4%   | 44.9%   | 32.5%   | 43.6%          |
| Interviews, conversations | 19.8%   | 17.6%   | 20.7%   | 20.8%   | 18.0%   | 24.0%   | 22.0%   | 20.4%          |
| Longer stories            | 18.2%   | 12.4%   | 14.9%   | 17.4%   | 13.2%   | 19.8%   | 18.1%   | 16.3%          |
| Audio                     | 15.6%   | 10.6%   | 13.4%   | 17.4%   | 12.0%   | 17.8%   | 14.6%   | 14.5%          |
| Virtual Reality           | 12.7%   | 12.4%   | 15.8%   | 13.1%   | 12.3%   | 16.8%   | 14.9%   | 14.0%          |

|                           | Total | Past Visitors | Travel intent (*) | EXP   | NLA   | RS    | SB     | PS    | LO    |
|---------------------------|-------|---------------|-------------------|-------|-------|-------|--------|-------|-------|
| Pictures, images          | 77.5% | 79.2%         | 84.6%             | 78.7% | 69.8% | 81.0% | 72.42% | 65.9% | 77.8% |
| Videos                    | 57.2% | 58.6%         | 66.3%             | 60.3% | 52.6% | 57.8% | 51.23% | 57.0% | 54.4% |
| Short texts               | 43.6% | 43.3%         | 42.5%             | 45.5% | 44.3% | 42.1% | 47.59% | 36.0% | 43.7% |
| Interviews, conversations | 20.4% | 23.1%         | 20.6%             | 22.2% | 25.4% | 15.9% | 23.05% | 26.7% | 18.8% |
| Longer stories            | 16.3% | 18.4%         | 14.2%             | 17.1% | 23.7% | 12.0% | 18.29% | 24.6% | 14.2% |
| Audio                     | 14.5% | 16.1%         | 11.2%             | 14.5% | 20.6% | 10.3% | 17.26% | 27.1% | 12.5% |
| Virtual Reality           | 14.0% | 14.6%         | 12.6%             | 13.6% | 18.6% | 10.4% | 15.59% | 25.5% | 13.7% |

(\*) Travel intent LUX = respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.



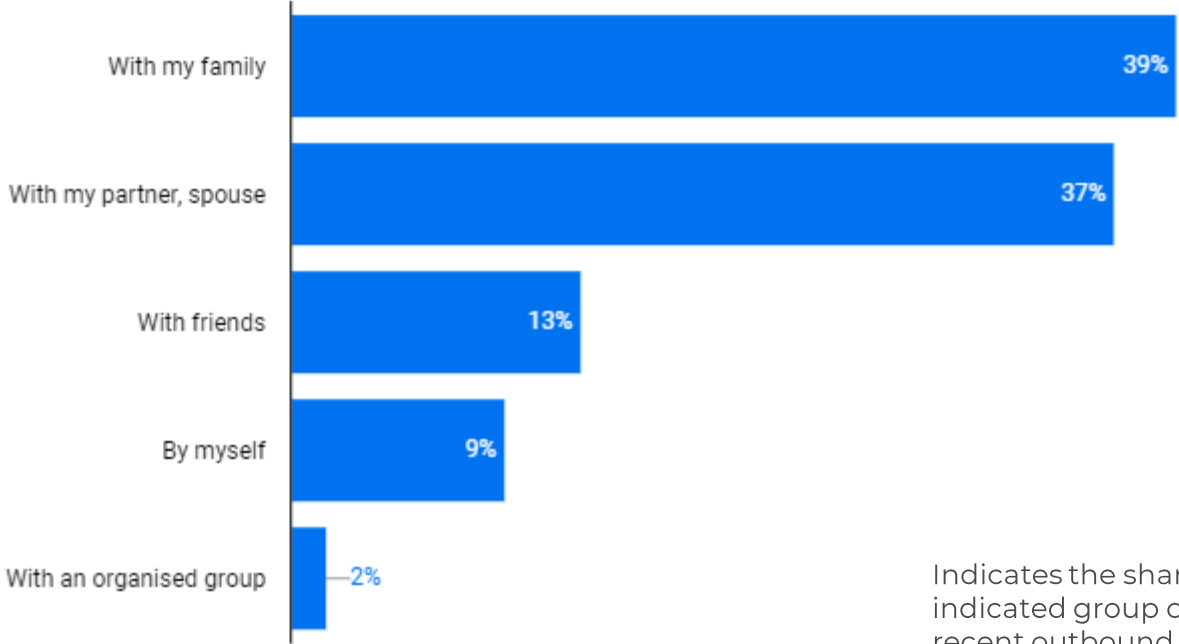
# 6

## Travel party

(not yet available for source markets ES-IT-PL)

# Travel party during most recent outbound holiday trip

— Average 11 European source markets\*



Indicates the share of respondents having travelled with the indicated group of persons (travel party) during their most recent outbound holiday trip.

Percentages by source markets, past visitors, new potential visitors and LFT target segments are presented on the following page.

\* DE-FR-BE-NL-UK-CH-AT-IE-DK-SE-PT

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

# Travel party during most recent outbound holiday trip

## Source markets – past and future visitors – LFT target segments



|                         | Total | Past Visitors | Travel intent (*) | EXP   | NLA   | RS    | SB    | PS    | LO    |
|-------------------------|-------|---------------|-------------------|-------|-------|-------|-------|-------|-------|
| With my family          | 39.4% | 36.8%         | 39.9%             | 34.3% | 35.9% | 40.7% | 29.9% | 38.3% | 45.9% |
| With my partner, spouse | 36.6% | 40.4%         | 37.4%             | 39.1% | 35.9% | 38.7% | 38.4% | 33.1% | 31.8% |
| With friends            | 12.9% | 10.3%         | 11.6%             | 13.9% | 12.7% | 11.2% | 16.5% | 14.2% | 12.9% |
| By myself               | 9.5%  | 11.4%         | 9.8%              | 10.7% | 14.0% | 8.6%  | 12.3% | 11.0% | 7.7%  |
| With an organised group | 1.6%  | 1.2%          | 1.2%              | 2.0%  | 1.6%  | 0.9%  | 2.8%  | 3.3%  | 1.7%  |

|                         | Belgium |          | Denmark |          | France |          | Germany |          | Italy |          |     |     |
|-------------------------|---------|----------|---------|----------|--------|----------|---------|----------|-------|----------|-----|-----|
|                         | Total   | FTI (**) | Total   | FTI (**) | Total  | FTI (**) | Total   | FTI (**) | Total | FTI (**) |     |     |
| With my family          | 34%     | 27%      | 40%     | 45%      | 49%    | 45%      | 37%     | 43%      | 33%   | 34%      | 43% | 39% |
| With my partner, spouse | 42%     | 44%      | 36%     | 33%      | 29%    | 34%      | 40%     | 41%      | 38%   | 42%      | 35% | 36% |
| With friends            | 14%     | 14%      | 14%     | 6%       | 11%    | 12%      | 13%     | 6%       | 13%   | 13%      | 13% | 16% |
| By myself               | 9%      | 14%      | 8%      | 12%      | 11%    | 8%       | 8%      | 9%       | 13%   | 10%      | 8%  | 8%  |
| With an organised group | 1%      | 0%       | 2%      | 3%       | 1%     | 1%       | 2%      | 1%       | 3%    | 2%       | 1%  | 1%  |

|                         | Spain |          | Portugal |          | Sweden |          | Switzerland |          | United Kingdom |          |
|-------------------------|-------|----------|----------|----------|--------|----------|-------------|----------|----------------|----------|
|                         | Total | FTI (**) | Total    | FTI (**) | Total  | FTI (**) | Total       | FTI (**) | Total          | FTI (**) |
| With my family          | 36%   | 41%      | 47%      | 47%      | 44%    | 47%      | 33%         | 41%      | 38%            | 32%      |
| With my partner, spouse | 38%   | 36%      | 35%      | 35%      | 32%    | 28%      | 40%         | 38%      | 39%            | 44%      |
| With friends            | 16%   | 15%      | 10%      | 10%      | 13%    | 16%      | 13%         | 9%       | 11%            | 10%      |
| By myself               | 7%    | 7%       | 7%       | 6%       | 11%    | 9%       | 13%         | 11%      | 10%            | 13%      |
| With an organised group | 2%    | 2%       | 2%       | 2%       | 1%     | 0%       | 1%          | 0%       | 1%             | 1%       |

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

(\*) Travel intent LUX = respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

(\*\*) FTI = future travel intent to Luxembourg





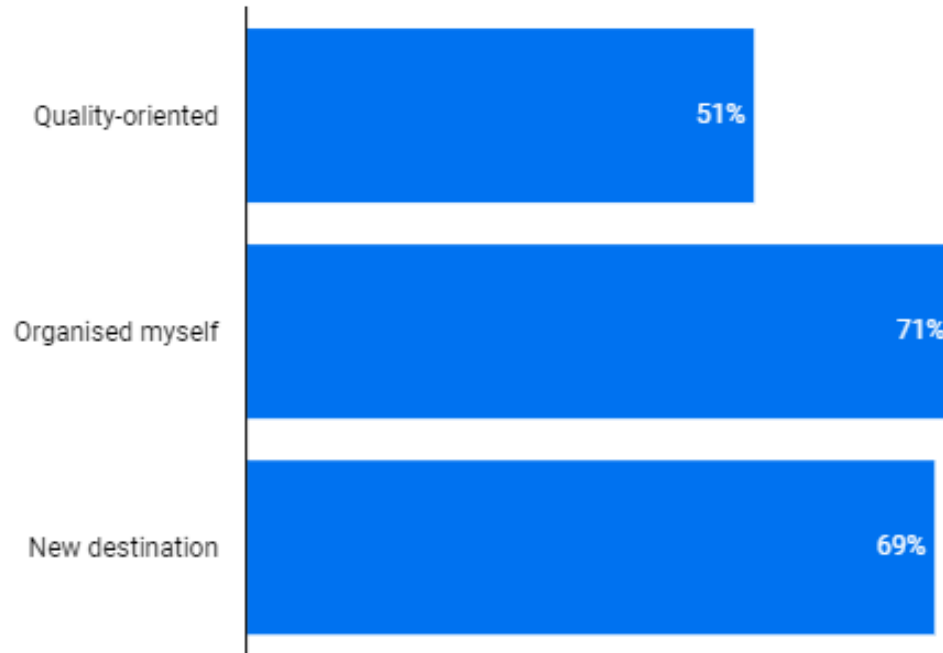
# 7

**Quality orientation - Mode of organisation -  
Destination type**

(not yet available for source markets ES-IT-PL)

# Quality orientation - Mode of organisation - Destination type

 — Average **7 European source markets\***



Indicates the share of respondents leaning towards quality rather than price, self-organisation and new destinations when travelling abroad:

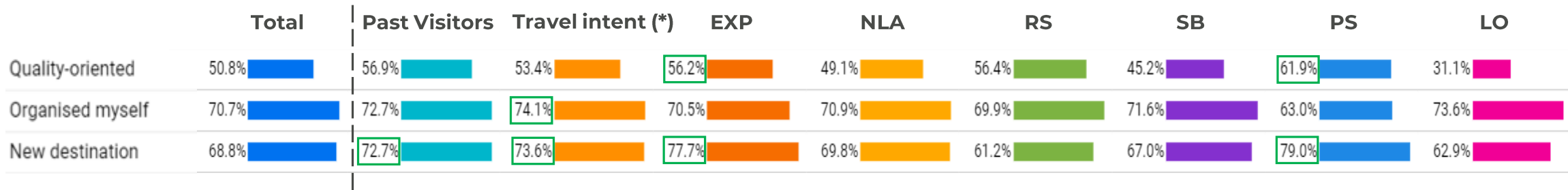
- Quality-oriented : prefer to look for higher quality offers rather than more affordable offers (even if it involves paying a slightly higher price)
- Organised myself : all travel arrangements during the most recent outbound holiday trip were organised by respondents themselves (rather than through a tour operator or agency)
- New destination : respondents travelled to a new, previously unvisited destination during their most recent outbound holiday trip

Percentages by source markets, past visitors, new potential visitors, LFT target segments and theme interest groups are presented on the following page.

\* DE-FR-BE-NL-UK-CH-AT

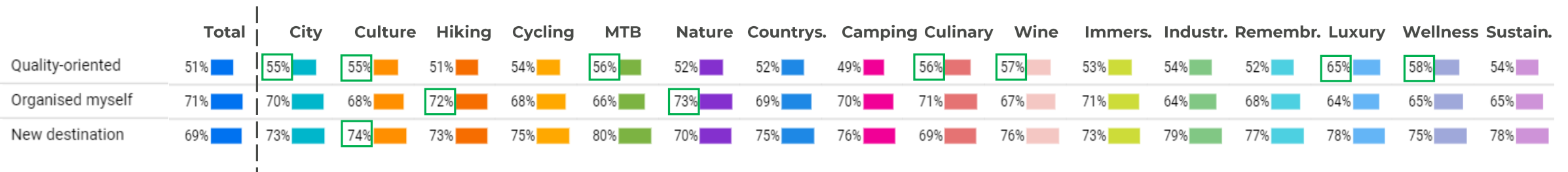
# Quality orientation - Mode of organisation - Destination type

Past and future visitors – LFT target segments – theme interest



Customer loyalty of Luxembourg visitors tends to become more difficult since both those with past and future visitors, as well as core LFT target segments all reveal above-average shares of preferring new destinations.

Quality orientation is highest among key LFT target segments EXP and PS.



(\*) Travel intent LUX = respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

(\*) FTI = future travel intent to Luxembourg



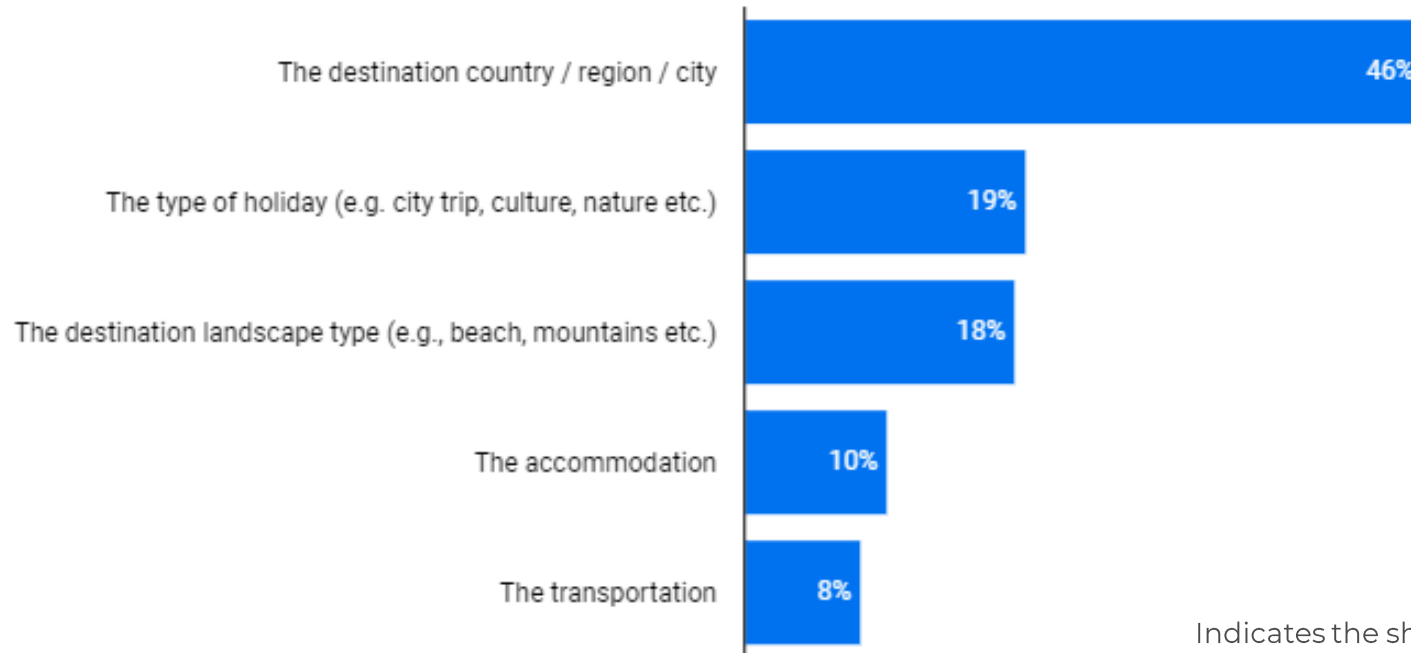
# 8

## Decision steps

(not yet available for source markets ES-IT-PL)

# Decision steps

— Average **7** European source markets

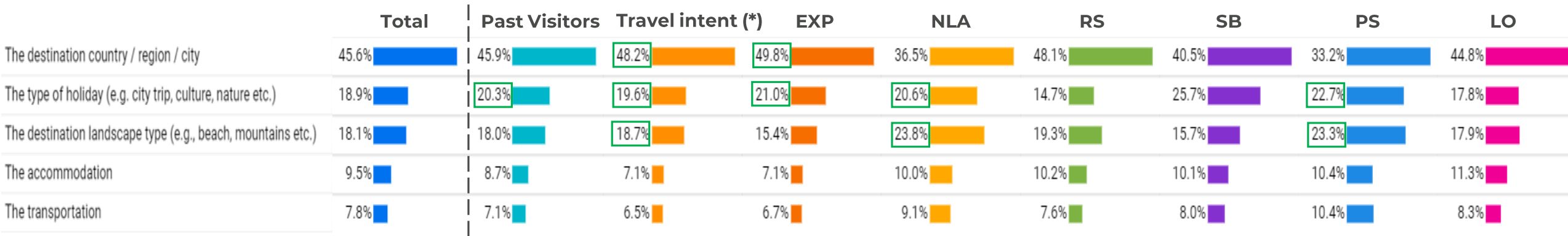


Indicates the shares of respondents by decision steps in the travel process, i.e. what elements of the trips were decided first during the most recent outbound holiday trip.

Percentages by source markets, past visitors, new potential visitors, LFT target segments and further demand indicators are presented on the following page.

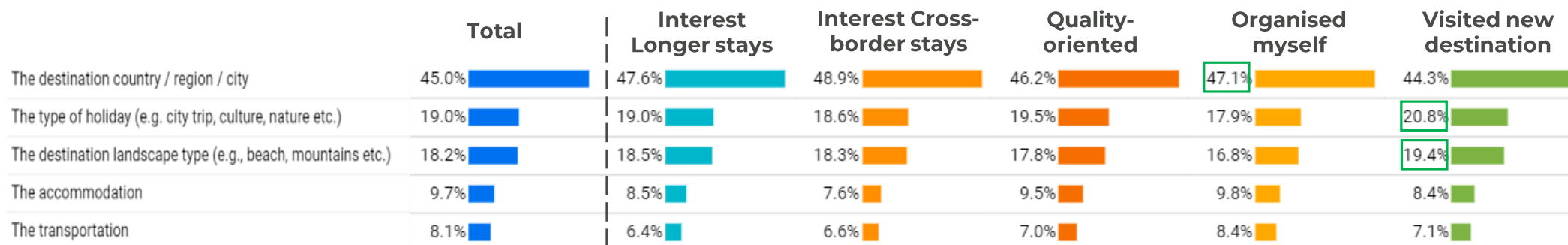
# Decision steps

## Past and future visitors – LFT target segments – further demand indicators



There will be increasing competition with other destinations with regard to new potential travelers and EXP, as they are more likely to choose the destination first. However, the share of those who decide on the type of holiday first is also higher among new potential travellers (and past visitors). Here, it will be easier to enter the relevant destination set for a particular activity. New potential travellers are also a segment where the destination landscape is often the decision trigger. Type of holiday and destination landscape are both more important for NLA and PS, type of holiday also for EXP. This emphasises the importance of community marketing.

Accommodation is rarely the trigger in holiday choice among both past and future potential visitors to Luxembourg, possibly due to a lack of exceptional accommodation that could serve as a driver for destination choice.



Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

(\*) Travel intent LUX = respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience. (\*\*) FTI = future travel intent to Luxembourg



# 9

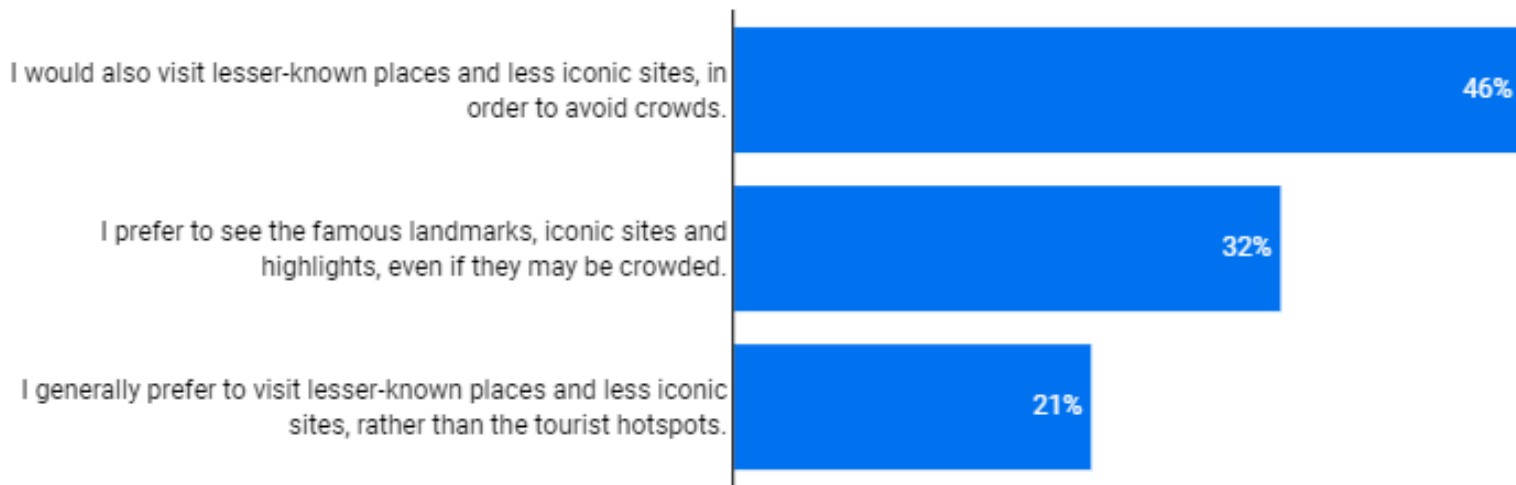
# Sustainability

(not yet available for source markets ES-IT-PL)

# Preference for iconic sites vs. lesser-known sites



— Average 7 European source markets\* – past and future visitors – LFT target segments



Indicates the share of respondents who prefer visiting either more iconic or lesser-known sites (also taking into account visitor crowding levels). Results refer to travel preferences in general, regardless of a specific trip or destination.

Percentages by past visitors, new potential visitors and LFT target segments are presented below.

|   | Total | Past Visitors | Travel intent (**) | EXP   | NLA   | RS    | SB    | PS    | LO    |
|---|-------|---------------|--------------------|-------|-------|-------|-------|-------|-------|
| Also lesser-known sites (to avoid crowds) | 46.4% | 44.5%         | 44.7%              | 46.3% | 46.5% | 47.9% | 46.3% | 43.1% | 46.1% |
| Iconic sites (even if crowded)            | 32.4% | 34.5%         | 36.5%              | 34.8% | 27.4% | 29.6% | 32.0% | 36.5% | 32.7% |
| Generally prefer lesser-known sites       | 21.2% | 21.0%         | 18.8%              | 19.0% | 26.1% | 22.6% | 21.7% | 20.4% | 21.2% |

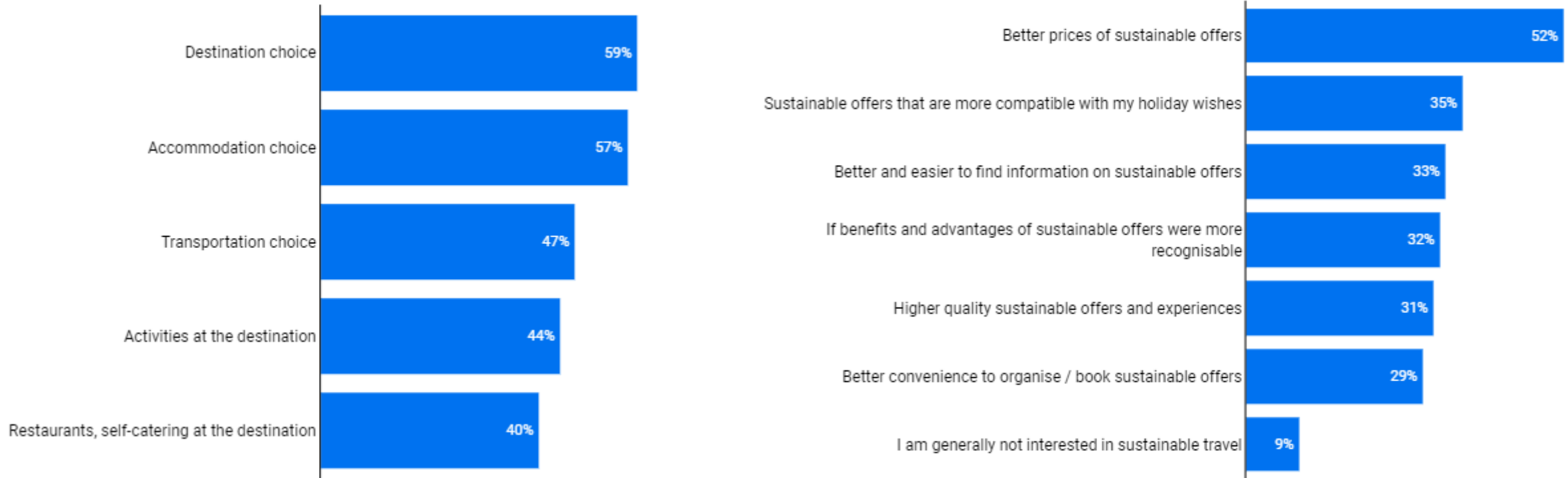
\* DE-FR-BE-NL-UK-CH-AT

(\*\*) Travel intent LUX = respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.



# Sustainability aspects

— Average 7 European source markets\*



Left chart : indicates the shares of respondents claiming that sustainability considerations were important with regard to the indicated trip components during their most recent outbound holiday trip.

Right chart : indicates the shares of respondents claiming which aspects could convince them to pay more heed to sustainability when travelling in the future.








\* DE-FR-BE-NL-UK-CH-AT








Percentages by source markets, past visitors, new potential visitors, LFT target segments and theme interest groups are presented on the following pages.

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.

# Sustainability aspects - Source Markets



|   |  |  |  |  |  |  |  | Average Europe |
|---|---|---|---|---|---|---|---|----------------|
| Destination choice                            | 53.0%   | 57.1%   | 74.1%   | 60.1%   | 47.8%   | 58.4%   | 59.1%   | 58.5%          |
| Accommodation choice                          | 57.9%   | 53.1%   | 64.1%   | 61.7%   | 45.9%   | 57.7%   | 56.6%   | 56.7%          |
| Transportation choice                         | 48.4%   | 46.0%   | 52.1%   | 47.0%   | 43.0%   | 45.1%   | 47.8%   | 47.1%          |
| Activities at the destination                 | 46.8%   | 40.7%   | 52.0%   | 47.7%   | 40.4%   | 44.1%   | 38.2%   | 44.3%          |
| Restaurants, self-catering at the destination | 53.4%   | 33.4%   | 34.4%   | 50.2%   | 30.3%   | 43.6%   | 37.4%   | 40.4%          |

|   |  |  |  |  |  |  |  | Average Europe |
|---|---|--|---|---|---|---|---|----------------|
| Better prices of sustainable offers                                     | 50.5%   | 56.1%  | 54.1%   | 50.1%   | 50.1%   | 47.2%   | 54.6%   | 51.8%          |
| Sustainable offers that are more compatible with my holiday wishes      | 35.9%   | 32.5%  | 33.8%   | 37.0%   | 35.2%   | 39.3%   | 34.3%   | 35.5%          |
| Better and easier to find information on sustainable offers             | 35.0%   | 27.1%  | 27.5%   | 37.0%   | 29.3%   | 34.6%   | 37.0%   | 32.5%          |
| If benefits and advantages of sustainable offers were more recognisable | 32.9%   | 27.0%  | 26.7%   | 35.1%   | 30.1%   | 35.2%   | 34.4%   | 31.6%          |
| Higher quality sustainable offers and experiences                       | 30.2%   | 25.8%  | 30.9%   | 35.9%   | 23.8%   | 37.2%   | 30.8%   | 30.7%          |
| Better convenience to organise / book sustainable offers                | 29.9%   | 26.5%  | 29.5%   | 31.2%   | 24.2%   | 33.1%   | 27.7%   | 28.9%          |
| I am generally not interested in sustainable travel                     | 8.1%  | 10.4%  | 9.2%  | 6.9%  | 11.6%   | 7.0%  | 9.2%  | 8.9%           |

# Sustainability aspects

— Average 7 European source markets\*, past and future visitors – LFT target segments



|   | Total | Past Visitors Travel intent (**) |       | EXP   | NLA   | RS    | SB    | PS    | LO    |
|---|-------|----------------------------------|-------|-------|-------|-------|-------|-------|-------|
| Destination choice  | 58.5% | 63.3%                            | 63.6% | 60.3% | 57.8% | 59.0% | 52.8% | 63.7% | 55.0% |
| Accommodation choice  | 56.7% | 60.2%                            | 61.9% | 54.5% | 53.6% | 62.1% | 50.3% | 55.0% | 56.1% |
| Transportation choice   | 47.1% | 51.5%                            | 51.6% | 46.0% | 47.0% | 48.1% | 49.1% | 46.5% | 48.2% |
| Activities at the destination   | 44.3% | 46.4%                            | 47.1% | 50.3% | 47.7% | 37.6% | 44.3% | 52.7% | 41.3% |
| Restaurants, self-catering at the destination                           | 40.4% | 41.0%                            | 43.7% | 37.7% | 36.9% | 44.3% | 37.5% | 45.0% | 39.3% |
| Better prices of sustainable offers                                     | 51.8% | 50.3%                            | 57.7% | 52.7% | 46.5% | 52.1% | 47.9% | 41.9% | 57.5% |
| Sustainable offers that are more compatible with my holiday wishes      | 35.5% | 39.8%                            | 35.3% | 40.2% | 37.7% | 33.6% | 31.0% | 38.5% | 30.8% |
| Better and easier to find information on sustainable offers             | 32.5% | 35.4%                            | 36.6% | 36.8% | 35.7% | 29.0% | 32.6% | 33.4% | 29.3% |
| If benefits and advantages of sustainable offers were more recognisable | 31.6% | 34.3%                            | 32.7% | 33.0% | 33.8% | 28.8% | 31.1% | 34.8% | 30.8% |
| Higher quality sustainable offers and experiences                       | 30.7% | 35.8%                            | 34.5% | 34.1% | 31.2% | 29.5% | 28.1% | 37.4% | 24.4% |
| Better convenience to organise / book sustainable offers                | 28.9% | 30.8%                            | 32.5% | 31.2% | 29.5% | 25.3% | 28.8% | 34.1% | 28.2% |
| I am generally not interested in sustainable travel                     | 8.9%  | 8.2%                             | 5.5%  | 6.3%  | 8.2%  | 11.8% | 10.3% | 7.5%  | 9.8%  |

\* DE-FR-BE-NL-UK-CH-AT

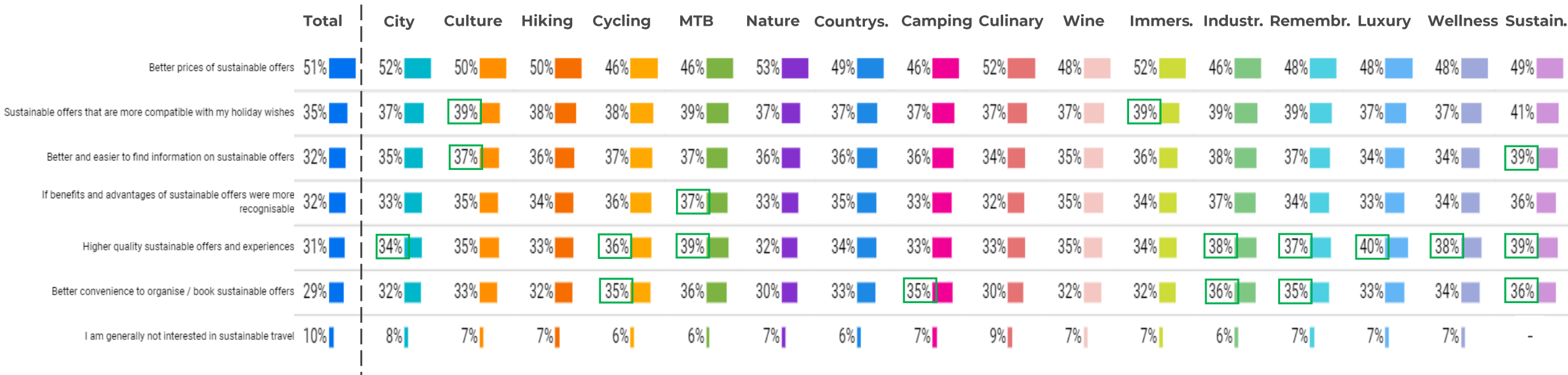
(\*\*) Travel intent LUX = respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.



# Sustainability aspects

— Average **7 European source markets\***, by theme interest



\* DE-FR-BE-NL-UK-CH-AT

Source: LFT Brand & Potential Studies 2023-2024, except data for ES/IT/PL: Destination Brand/Inspektour.



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