



Luxembourg for Tourism

Brand & Potential Study

2025 – FULL STUDY REPORT

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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, Theme interest and 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.



1

Brand funnel

Brand Funnel : Key insights



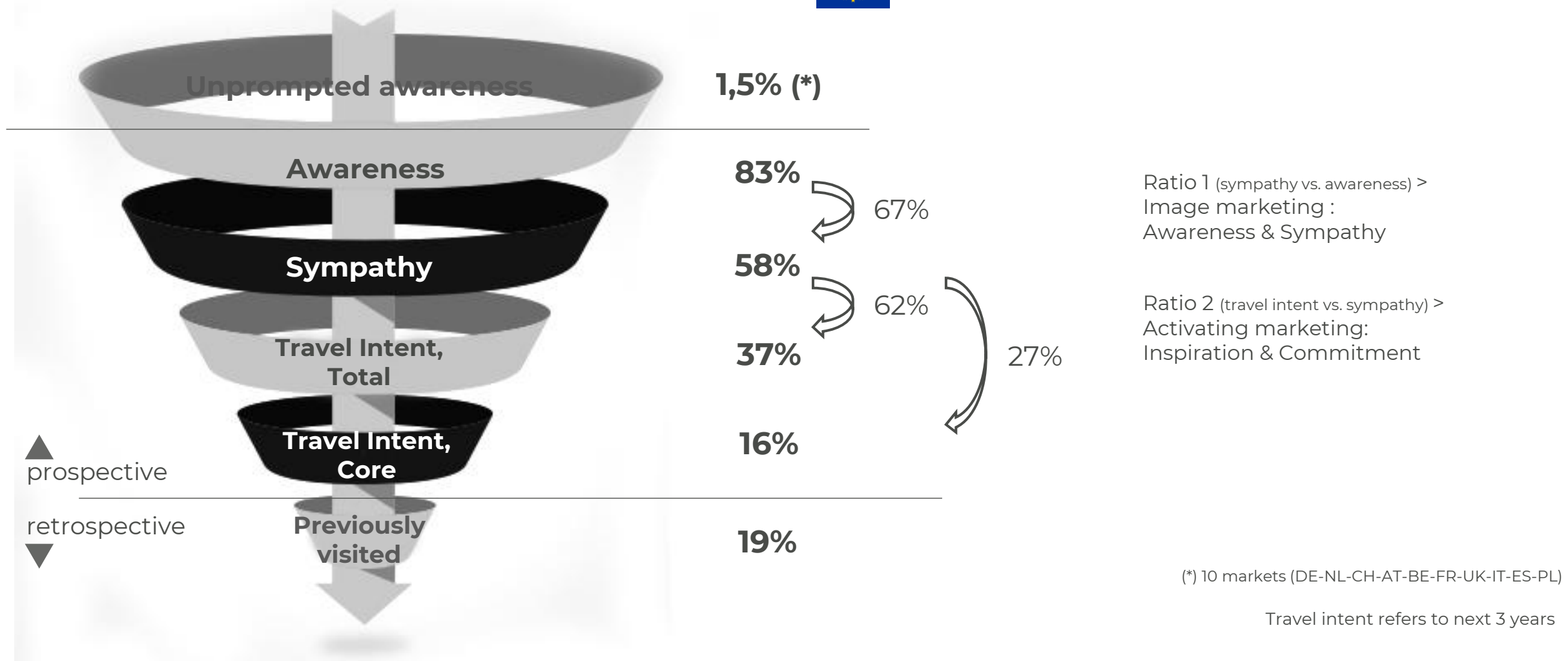
- **High awareness but conversion losses along the funnel.** Across 14 European source markets, Luxembourg achieves an aided awareness of 83%. From awareness to sympathy, 67% convert (Ratio 1), but from sympathy to travel intent only 62% remain (Ratio 2). As a result, 37% of respondents express travel intent for the next three years, while only 16% fall into the "core" segment (certain intent). The greatest marketing leverage therefore lies in the activation phase — the step from sympathy to a concrete travel decision.
- **Significant differences between source markets in funnel profile.** Belgium combines the highest sympathy, travel intent and repeat visitation rates. France, Spain and Portugal show disproportionately high travel intent relative to their sympathy levels — an indication of strong activating potential. Conversely, Switzerland and the Netherlands exhibit high sympathy but relatively weak conversion to travel intent: potential is being lost here. The Nordic markets (Denmark, Sweden) and Ireland rank in the lower tier on both dimensions.
- **Enormous absolute visitor potential in volume markets.** Germany leads with 15.9 million (total) and 7.7 million (core) potential travellers, followed by France (9.6m/3.6m) and the UK (11.2m/4.6m). Spain (10.0m/5.0m) and Italy (11.2m/4.7m) also hold substantial volume. These markets must be prioritised in budget allocation decisions.
- **Tourism experience strengthens the brand sustainably.** Respondents with prior Luxembourg travel experience consistently show higher sympathy and travel intent scores than non-visitors. This confirms the positive feedback loop between tourism and nation branding, and underscores the importance of first-visit quality.
- **24% of non-choosers do not know Luxembourg well enough.** This is the second most important reason for not choosing Luxembourg, after "other destinations are more interesting" (50%). A further 16% state they simply "haven't thought of it" — together accounting for nearly 40% of non-selection, both attributable to a knowledge and inspiration deficit that can potentially be addressed through content marketing.
- **Target segments show distinct funnel dynamics.** Explorers (EXP) — the core target group — lose a disproportionate amount of potential along the funnel and more frequently find other destinations "more interesting". Perfection Seekers (PS), on the other hand, show above-average travel intent despite moderate sympathy. Nature-Loving Actives (NLA) and Short Breakers (SB) more frequently cite price as a barrier.

Destination Luxembourg - Brand Funnel 2024

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



— Average **14 European source markets**



Destination Luxembourg - Brand Funnel 2024-2025

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



	Total	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Awareness Lux	83%	83%	88%	86%	78%	80%	91%	81%	82%	88%	80%	82%	77%	84%
Sympathy Lux (% of total)	58%	58%	67%	56%	58%	62%	53%	53%	63%	63%	54%	50%	61%	52%
Travel intent Lux (% of total)	37%	36%	46%	33%	43%	40%	26%	39%	35%	41%	42%	27%	37%	31%
Travel intent Lux Core (% of total)	16%	17%	20%	13%	18%	20%	11%	16%	17%	22%	21%	11%	16%	12%

	Total	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Past visits (ovn) (% of total)	19%	13%	41%	21%	17%	18%	8%	16%	41%	8%	18%	14%	20%	11%

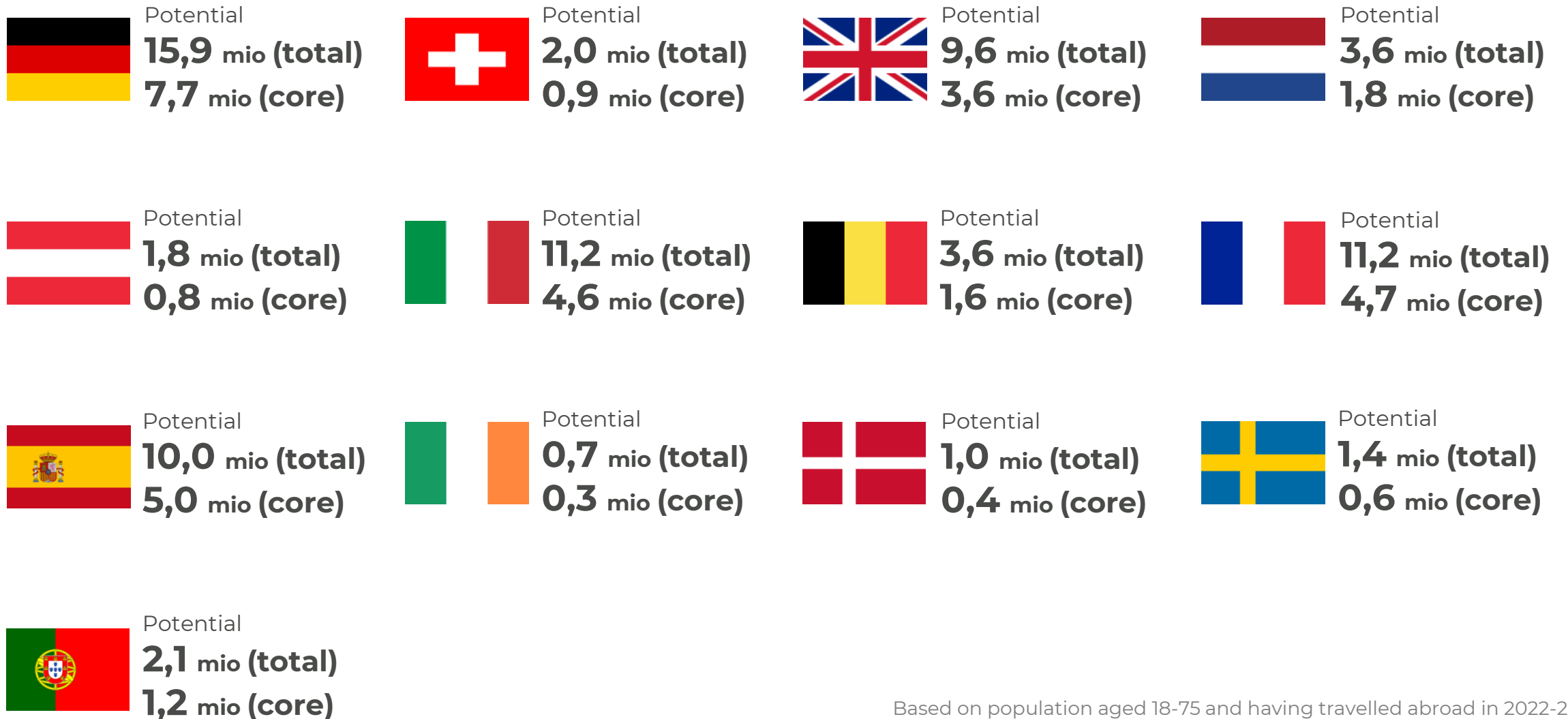
- A large net positive result in the last column indicates significant new potential (i.e., few past visits but high future travel intent).
- Strongest core future travel intent is recorded in BE, DE, FR, ES and PT.

Source: LFT Brand & Potential Studies 2023-2024, except data for 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 - Brand Funnel 2024-2025

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



Based on population aged 18-75 and having travelled abroad in 2022-2023.

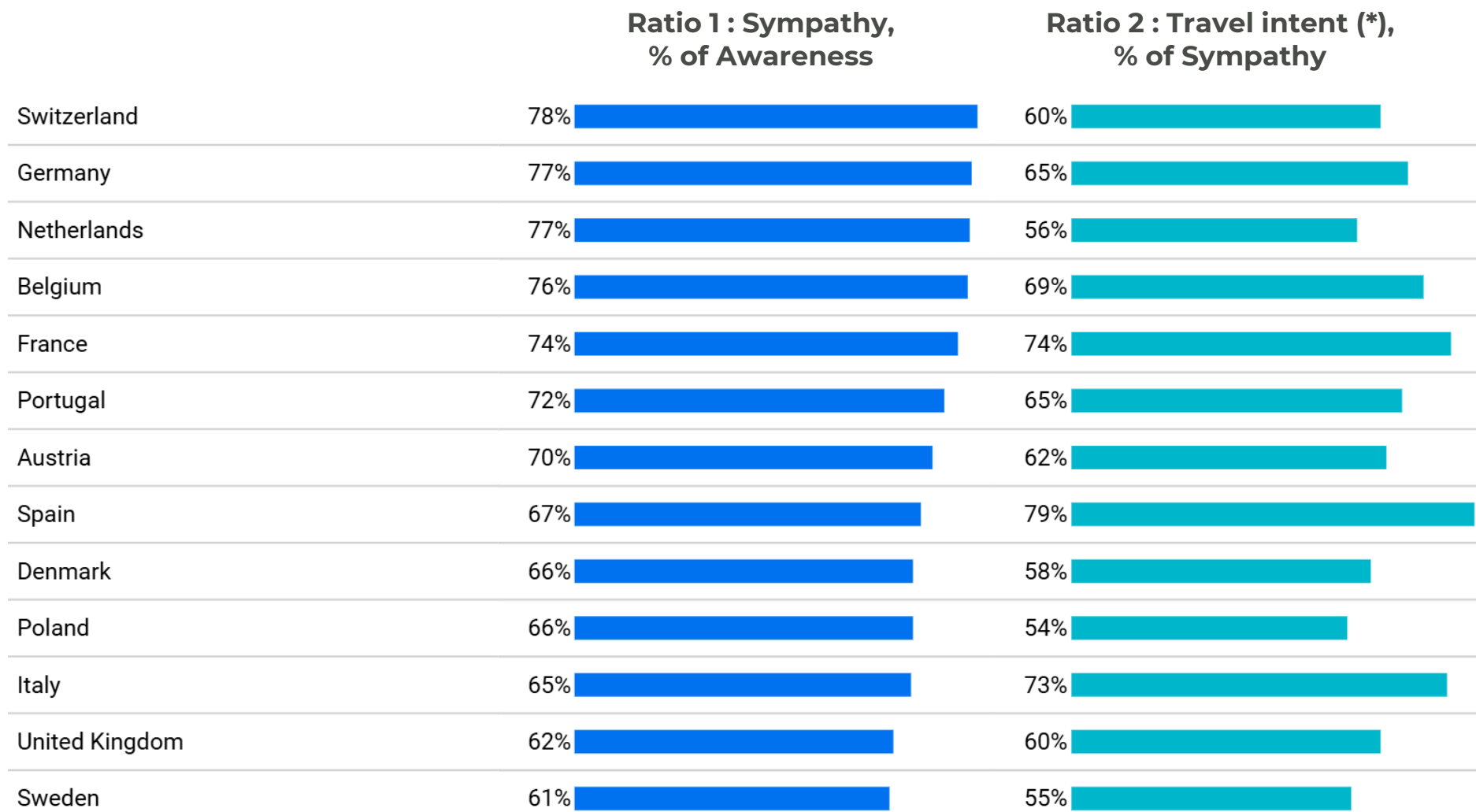
Source: LFT Brand & Potential Studies 2023-2024,
except data for PL: Destination Brand/Inspektour.

Destination Luxembourg - Ranking Sympathy / Travel Intent / Past Visits



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

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).

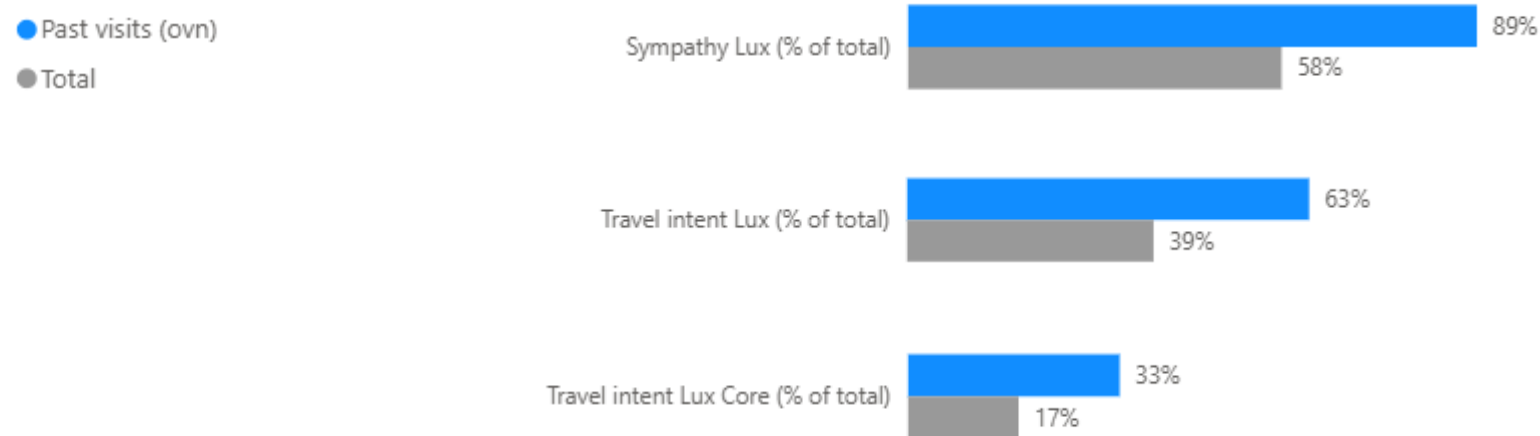
(*) next 3 years

Destination Luxembourg - Brand Funnel 2024



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

Destination Luxembourg - Brand Funnel 2024



Differences between brand connoisseurs with and without previous visiting experience

Sympathy Lux (% of total)	
☐ Past visits (ovn)	
Austria	92%
Belgium	91%
Denmark	
France	95%
Germany	93%
Ireland	
Italy	76%
Netherlands	91%
Portugal	
Spain	79%
Sweden	
Switzerland	95%
United Kingdom	93%
☐ Total	
Austria	58%
Belgium	67%
Denmark	
France	58%
Germany	62%
Ireland	
Italy	53%
Netherlands	63%
Portugal	
Spain	54%
Sweden	
Switzerland	61%
United Kingdom	52%

Travel intent Lux Core (% of total)	
☐ Past visits (ovn)	
Austria	40%
Belgium	34%
Denmark	
France	38%
Germany	43%
Ireland	
Italy	26%
Netherlands	30%
Portugal	
Spain	32%
Sweden	
Switzerland	34%
United Kingdom	25%
☐ Total	
Austria	17%
Belgium	20%
Denmark	
France	18%
Germany	20%
Ireland	
Italy	16%
Netherlands	17%
Portugal	
Spain	21%
Sweden	
Switzerland	16%
United Kingdom	12%

The gap in sympathy perception is particularly large in UK, IE, ES, FR, and is small in CH, DE, PT.

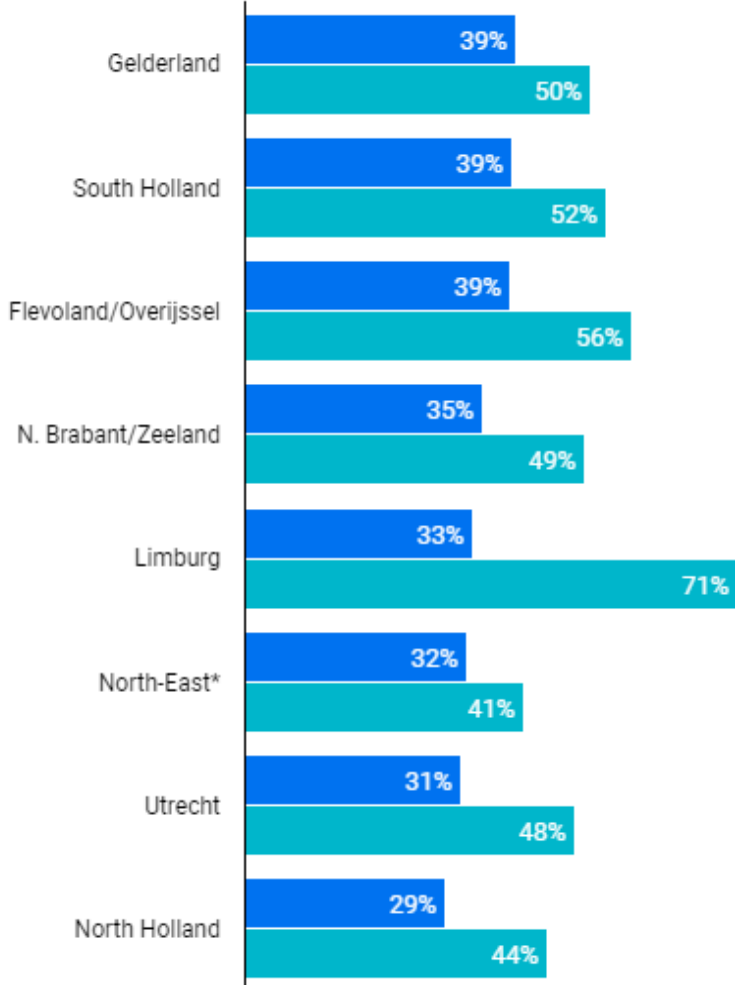
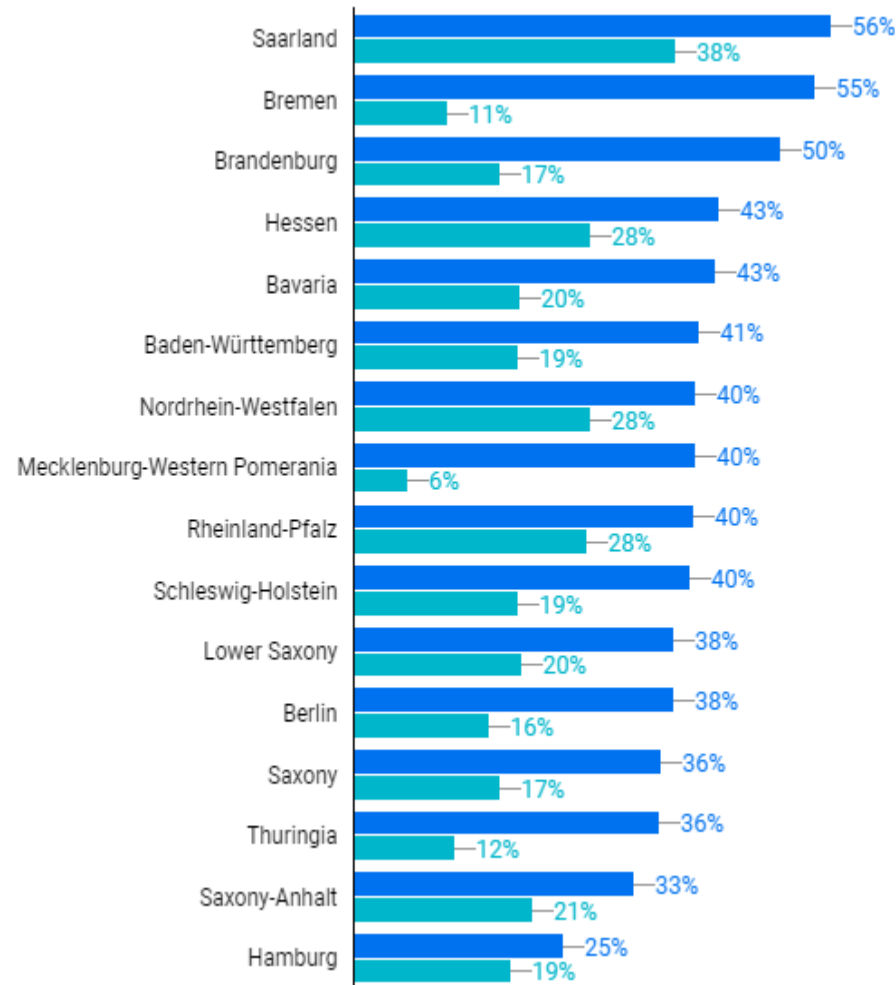
The gap in travel intent is particularly large in PL, AT and is small in FR, PT, SE, IE.

Regional origin 2024

Past visitors and future potential



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

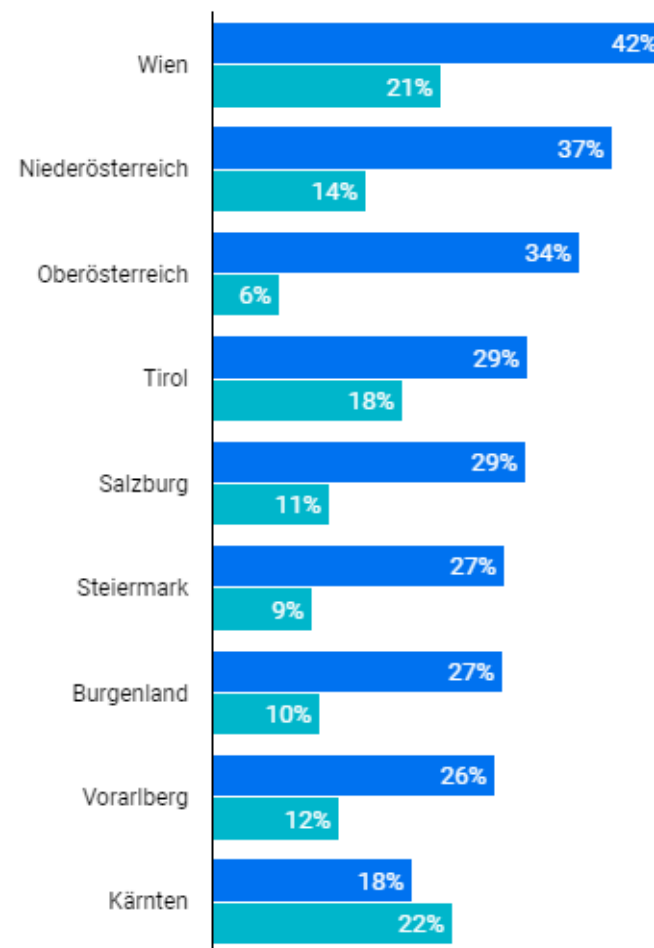
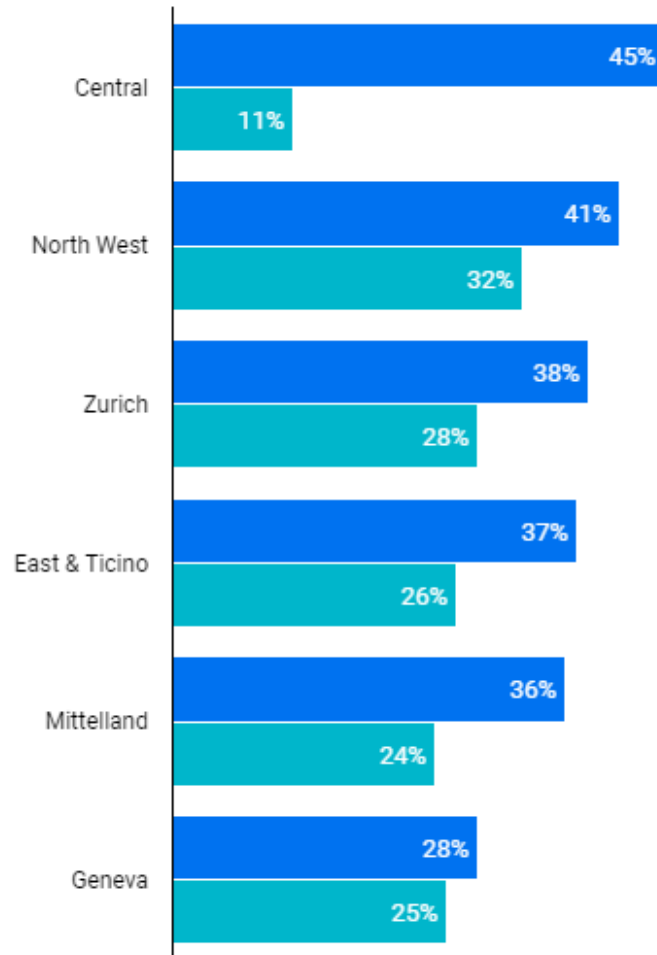
Source: LFT Brand & Potential Studies 2023-2024, except data for PL: Destination Brand/Inspektour.

Regional origin 2024

Past visitors and future potential



Travel intent (*) Visits in the past



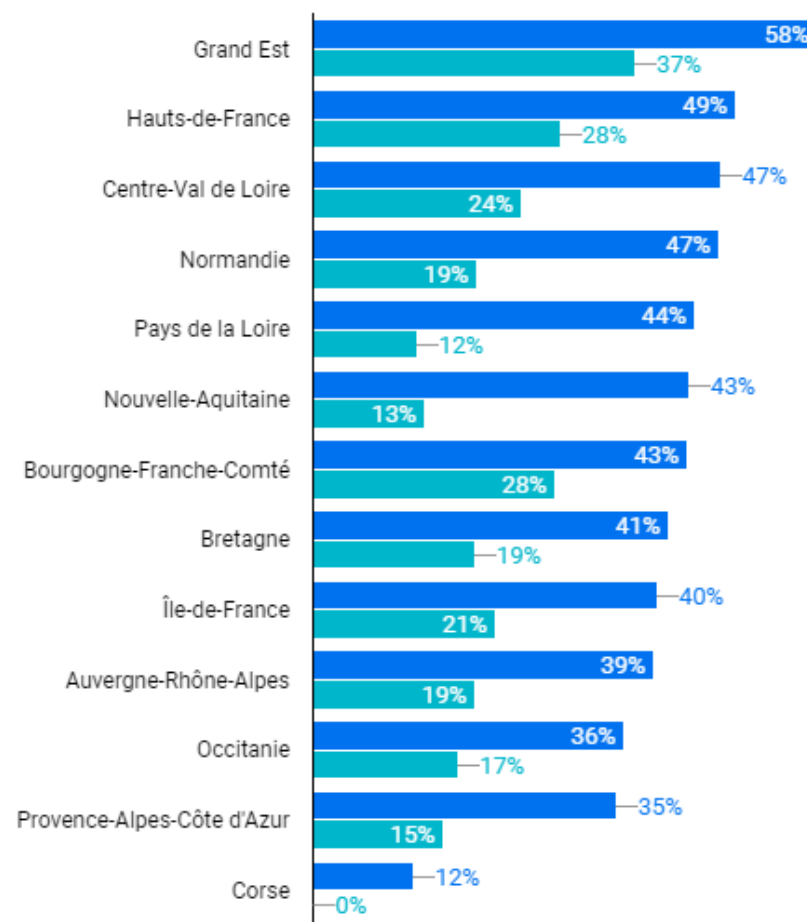
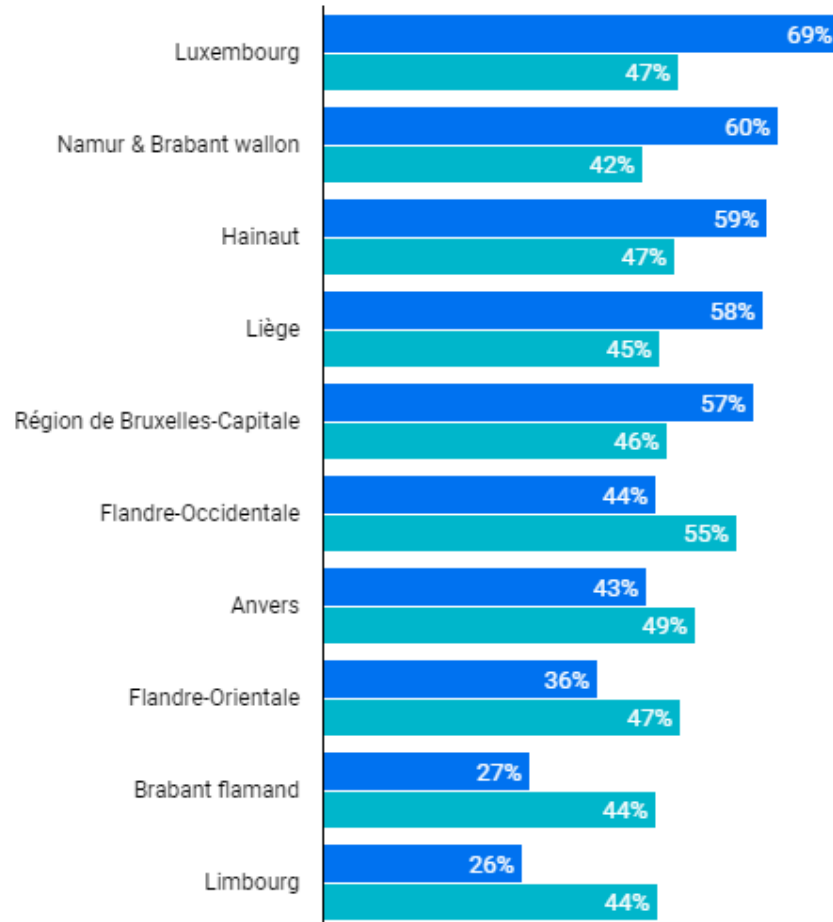
	Travel Intent (mn)	Past visits (mn)		Travel Intent (mn)	Past visits (mn)
Central	0.28	0.07	Burgenland	0.06	0.02
East & Ticino	0.42	0.30	Kärnten	0.08	0.09
Geneva	0.34	0.31	Niederösterreich	0.46	0.18
Mittelland	0.50	0.33	Oberösterreich	0.38	0.07
North West	0.36	0.28	Salzburg	0.12	0.05
Zurich	0.09	0.07	Steiermark	0.25	0.09
			Tirol	0.17	0.10
			Vorarlberg	0.08	0.03
			Wien	0.62	0.31

Regional origin 2024

Past visitors and future potential



Travel intent (*) Visits in the past



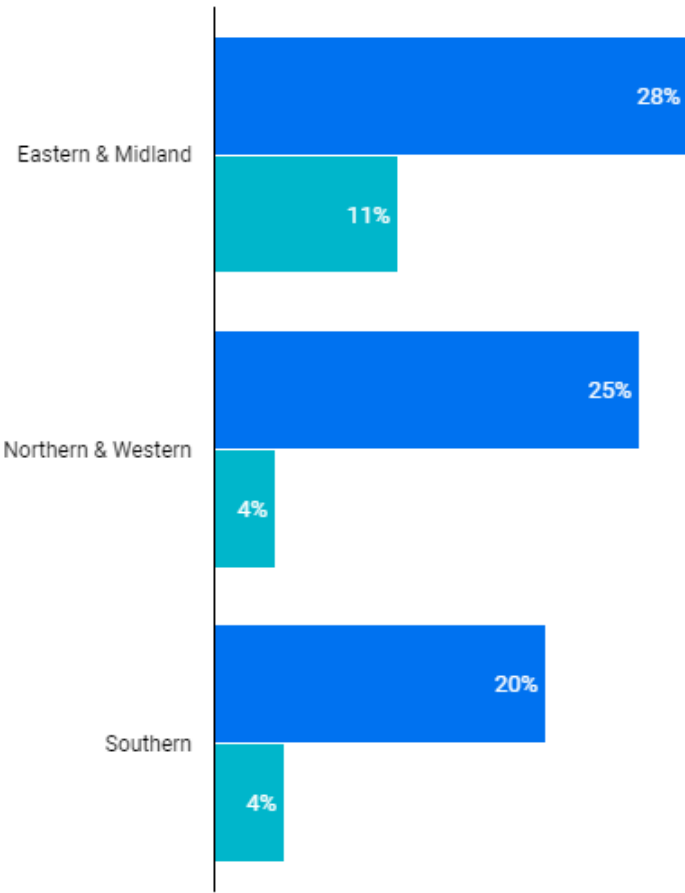
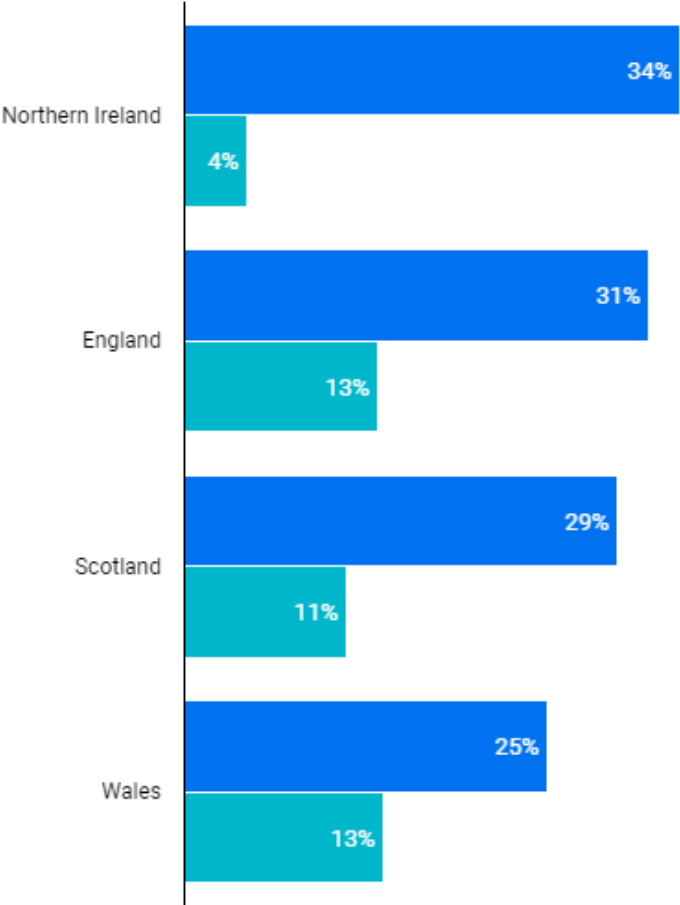
	Travel Intent (mn)	Past visits (mn)		Travel Intent (mn)	Past visits (mn)
Anvers	0.58	0.66	Auvergne-Rhône-Alpes	2.20	1.04
Brabant flamand	0.23	0.37	Bourgogne-Franche-Comté	0.82	0.53
Flandre-Occidentale	0.38	0.47	Bretagne	0.96	0.44
Flandre-Orientale	0.40	0.52	Centre-Val de Loire	0.82	0.42
Hainaut	0.57	0.45	Corse	0.03	0.00
Liège	0.46	0.35	Grand Est	2.25	1.44
Limbourg	0.17	0.29	Hauts-de-France	2.00	1.17
Luxembourg	0.14	0.10	Île-de-France	3.44	1.82
Namur & Brabant wallon	0.39	0.28	Normandie	1.06	0.43
Région Bruxelles-Capitale	0.51	0.41	Nouvelle-Aquitaine	1.83	0.54
			Occitanie	1.50	0.71
			Pays de la Loire	1.17	0.32
			Provence-Alpes-Côte d'Azur	1.23	0.53

Regional origin 2024

Past visitors and future potential



Travel intent (*) Visits in the past



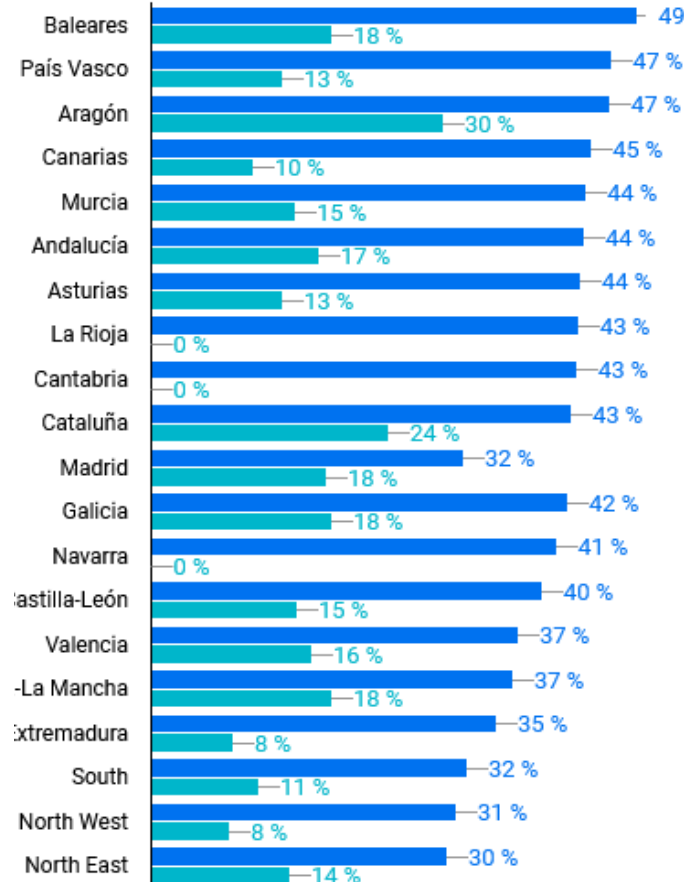
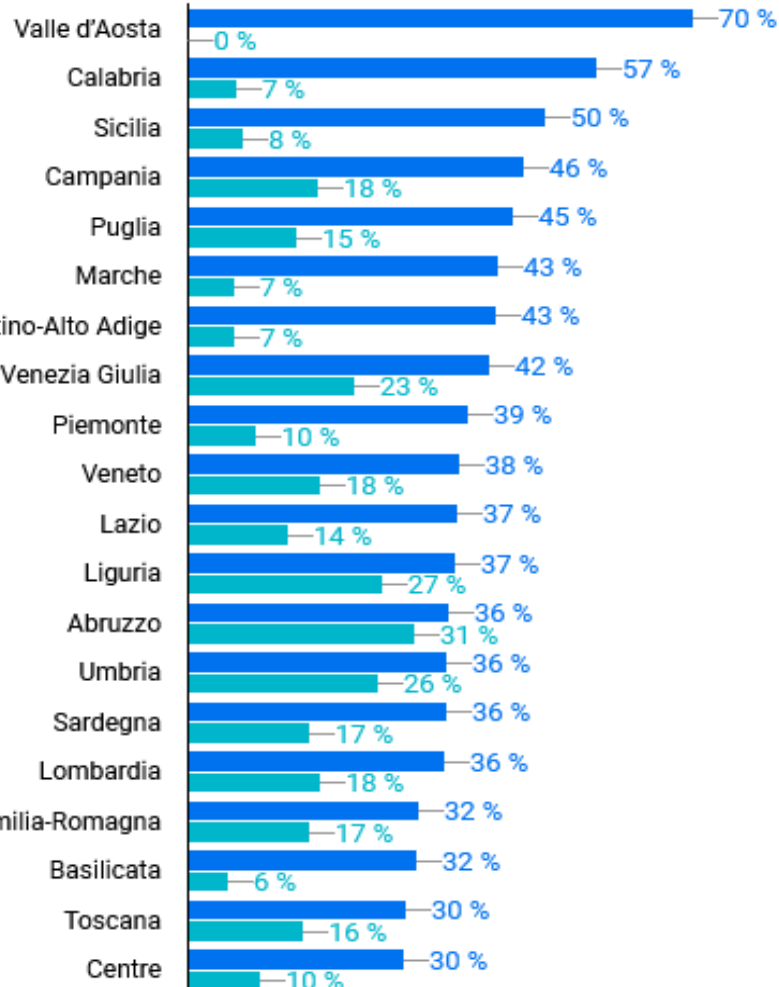
	Travel Intent (mn)	Past visits (mn)		Travel Intent (mn)	Past visits (mn)
England	12.79	5.30	Eastern & Midland	0.52	0.20
Northern Ireland	0.45	0.06	Northern & Western	0.16	0.02
Scotland	1.17	0.44	Southern	0.24	0.05
Wales	0.55	0.30			

Regional origin 2024

Past visitors and future potential



Travel intent (*) Visits in the past



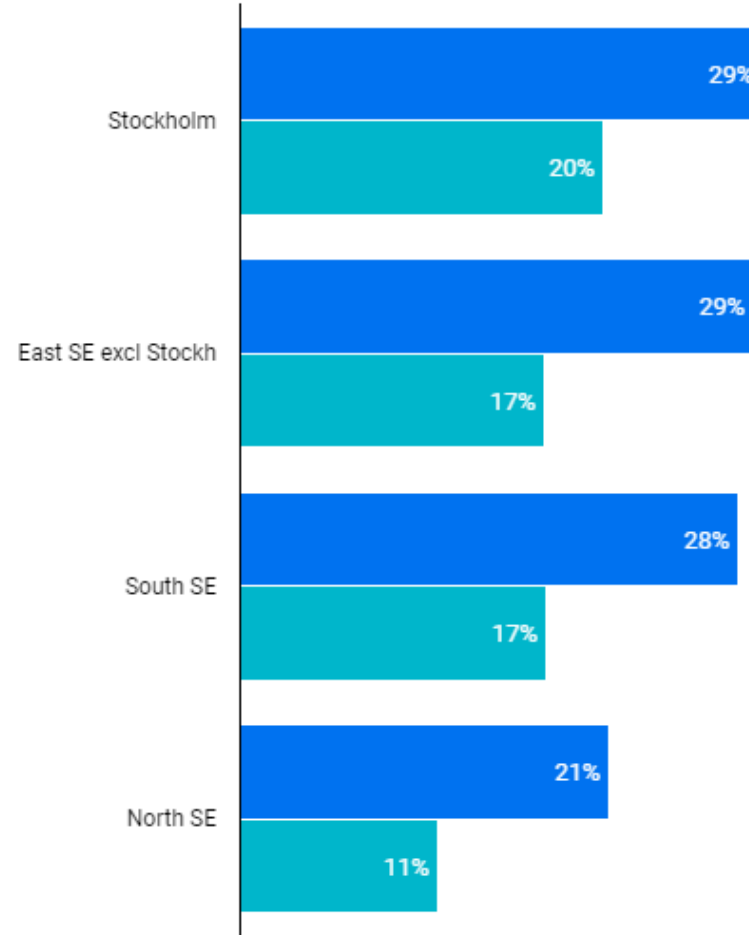
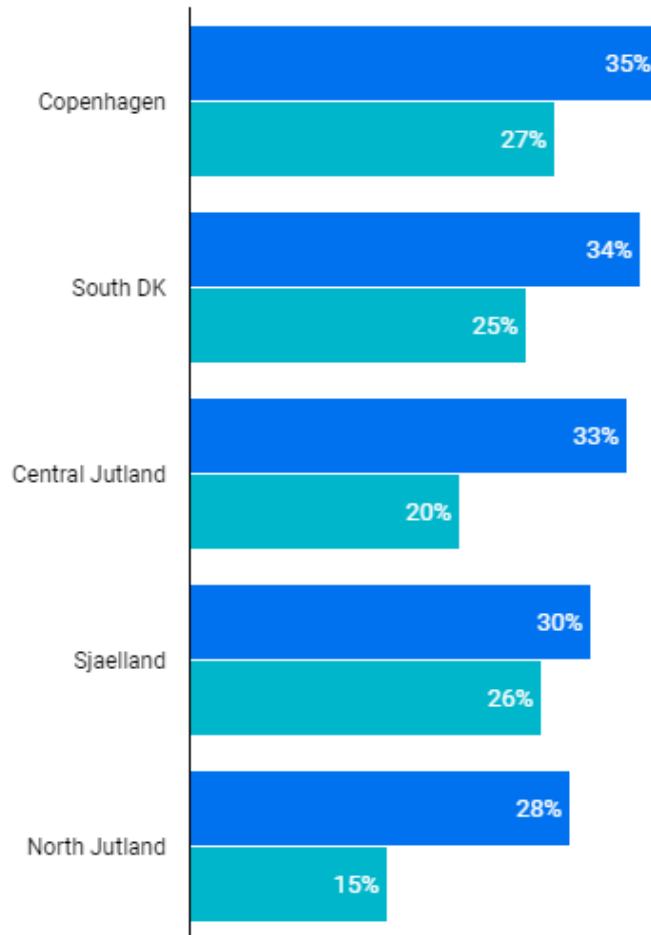
	Travel Intent (mn)	Past visits (mn)		Travel Intent (mn)	Past visits (mn)
Valle d'Aosta	0.07	0.00	Andalucía	2.99	1.16
Piemonte	1.31	0.32	Aragón	0.50	0.32
Liguria	0.45	0.33	Asturias	0.35	0.11
Lombardia	2.85	1.47	Baleares	0.52	0.20
Trentino-Alto Adige	0.37	0.06	Canarias	0.86	0.20
Veneto	1.46	0.71	Cantabria	0.22	0.00
Friuli Venezia Giulia	0.40	0.22	Castilla-La Mancha	0.66	0.33
Emilia-Romagna	1.13	0.60	Castilla-León	0.82	0.31
Toscana	0.89	0.47	Cataluña	2.93	1.65
Umbria	0.25	0.18	Extremadura	0.32	0.08
Marche	0.52	0.08	Galicia	0.98	0.43
Lazio	1.76	0.66	La Rioja	0.12	0.00
Abruzzo	0.37	0.32	Madrid	2.55	1.25
Molise	0.07	0.07	Murcia	0.60	0.20
Campania	2.14	0.84	Navarra	0.24	0.00
Puglia	1.44	0.48	País Vasco	0.90	0.26
Basilicata	0.16	0.03	Valencia	1.71	0.75
Calabria	0.83	0.10	Ceuta	0.00	0.00
Sicilia	1.96	0.31	Melilla	0.00	0.00
Sardegna	0.62	0.29			

Regional origin 2024

Past visitors and future potential



Travel intent (*) Visits in the past



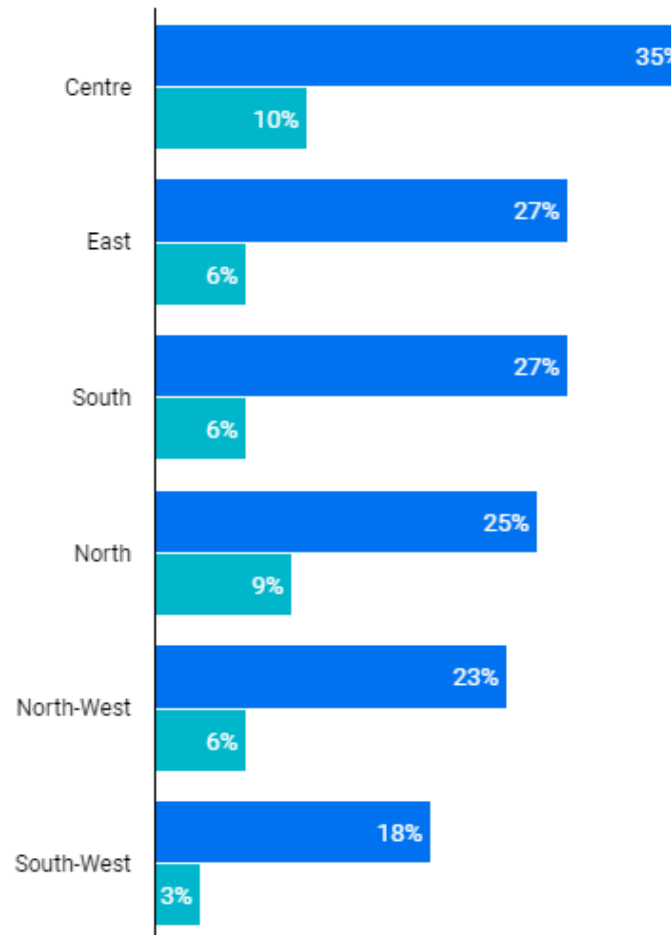
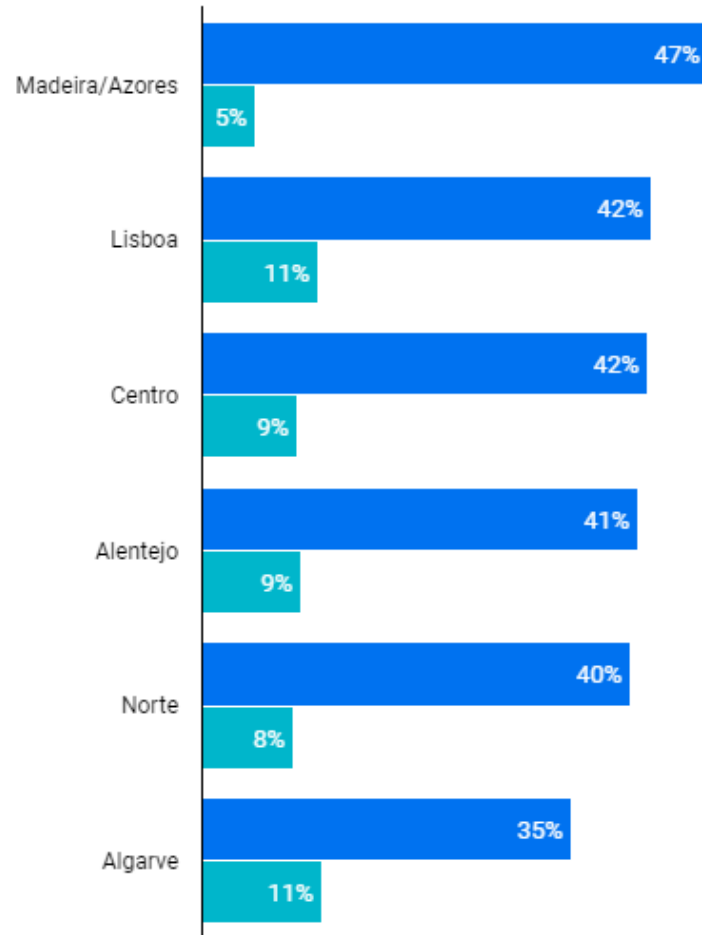
	Travel Intent (mn)	Past visits (mn)		Travel Intent (mn)	Past visits (mn)
Central Jutland	0.31	0.19	East SE, excl. Stockh	0.35	0.21
Copenhagen	0.48	0.37	North SE	0.25	0.13
North Jutland	0.12	0.06	South SE	0.87	0.54
Sjaelland	0.18	0.16	Stockholm	0.50	0.35
South DK	0.29	0.22			

Regional origin 2024*

Past visitors and future potential



Travel intent (*) Visits in the past



	Travel Intent (mn)	Past visits (mn)		Travel Intent (mn)	Past visits (mn)
Alentejo	0.21	0.05	Centre	2.31	0.66
Algarve	0.12	0.04	East	0.99	0.22
Centro	0.67	0.14	North	1.03	0.37
Lisboa	0.87	0.23	North-West	1.03	0.27
Madeira/Azores	0.17	0.02	South	1.51	0.34
Norte	1.08	0.23	South-West	0.50	0.08

* PL: 2021

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)

	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers	Total
Awareness Lux	85%	82%	71%	63%	89%	75%	82%
Sympathy Lux (% of total)	68%	58%	58%	50%	62%	58%	61%
Travel intent Lux (% of total)	46%	37%	38%	38%	39%	39%	40%
Travel intent Lux Core (% of total)	21%	18%	18%	20%	16%	17%	18%

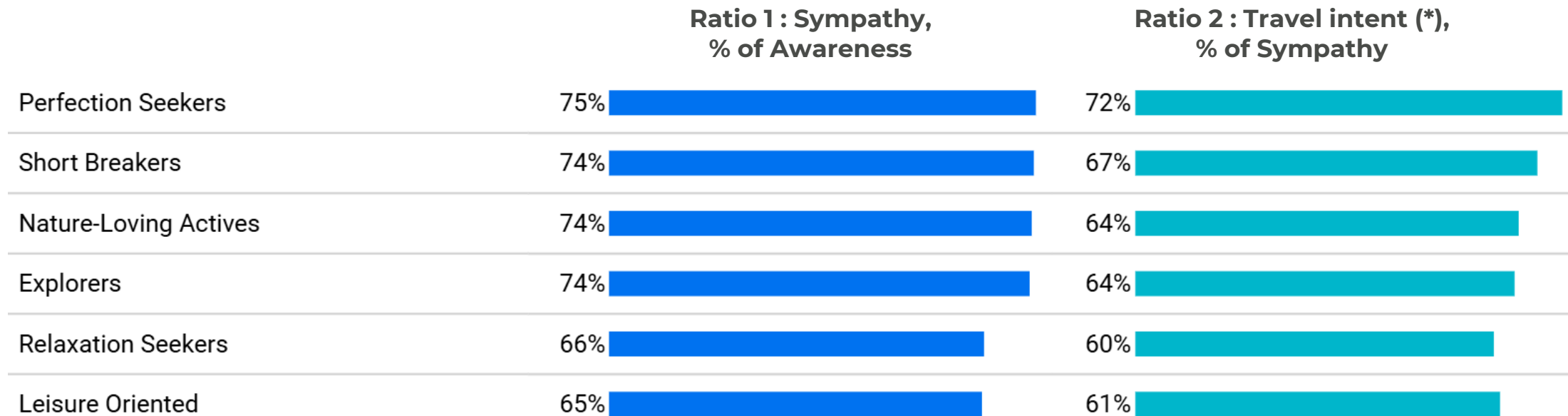
	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers	Total
Past visits (ovn) (% of total)	30%	23%	27%	24%	27%	28%	27%

	Austria	Belgium	France	Germany	Italy	Netherlands	Spain	Switzerland	United Kingdom	
▣ Awareness Lux	78%	85%	73%		74%	80%	76%	79%	72%	80%
▣ Sympathy Lux (% of total)										
Explorers	67%	74%	67%		69%	55%	68%	56%	68%	63%
Relaxation Seekers	60%	63%	60%		67%	50%	65%	52%	65%	49%
Nature-Loving Actives	51%	70%	43%		56%	56%	65%	53%	59%	46%
Short Breakers	56%	74%	48%		53%	52%	62%	52%	47%	51%
Leisure Oriented	52%	61%	54%		59%	49%	62%	50%	51%	48%
Perfection Seekers	48%	55%	55%		48%	53%	39%	59%	55%	43%
▣ Travel intent Lux Core (% of total)										
Explorers	21%	23%	21%		25%	18%	18%	24%	15%	18%
Perfection Seekers	16%	21%	19%		20%	18%	20%	24%	24%	15%
Nature-Loving Actives	26%	27%	8%		16%	15%	19%	23%	20%	11%
Short Breakers	14%	24%	15%		19%	13%	14%	19%	17%	10%
Relaxation Seekers	15%	14%	19%		19%	15%	16%	21%	15%	9%
Leisure Oriented	11%	22%	17%		17%	13%	18%	15%	12%	9%
▣ Past visits (ovn) (% of total)										
Explorers	13%	46%	20%		24%	16%	41%	19%	25%	15%
Nature-Loving Actives	20%	43%	13%		16%	19%	42%	26%	23%	14%
Perfection Seekers	16%	29%	16%		21%	25%	32%	29%	28%	16%
Short Breakers	18%	51%	13%		18%	14%	40%	16%	12%	15%
Relaxation Seekers	10%	40%	16%		17%	14%	44%	16%	18%	8%
Leisure Oriented	12%	36%	15%		12%	15%	38%	13%	11%	7%

(*) next 3 years

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

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

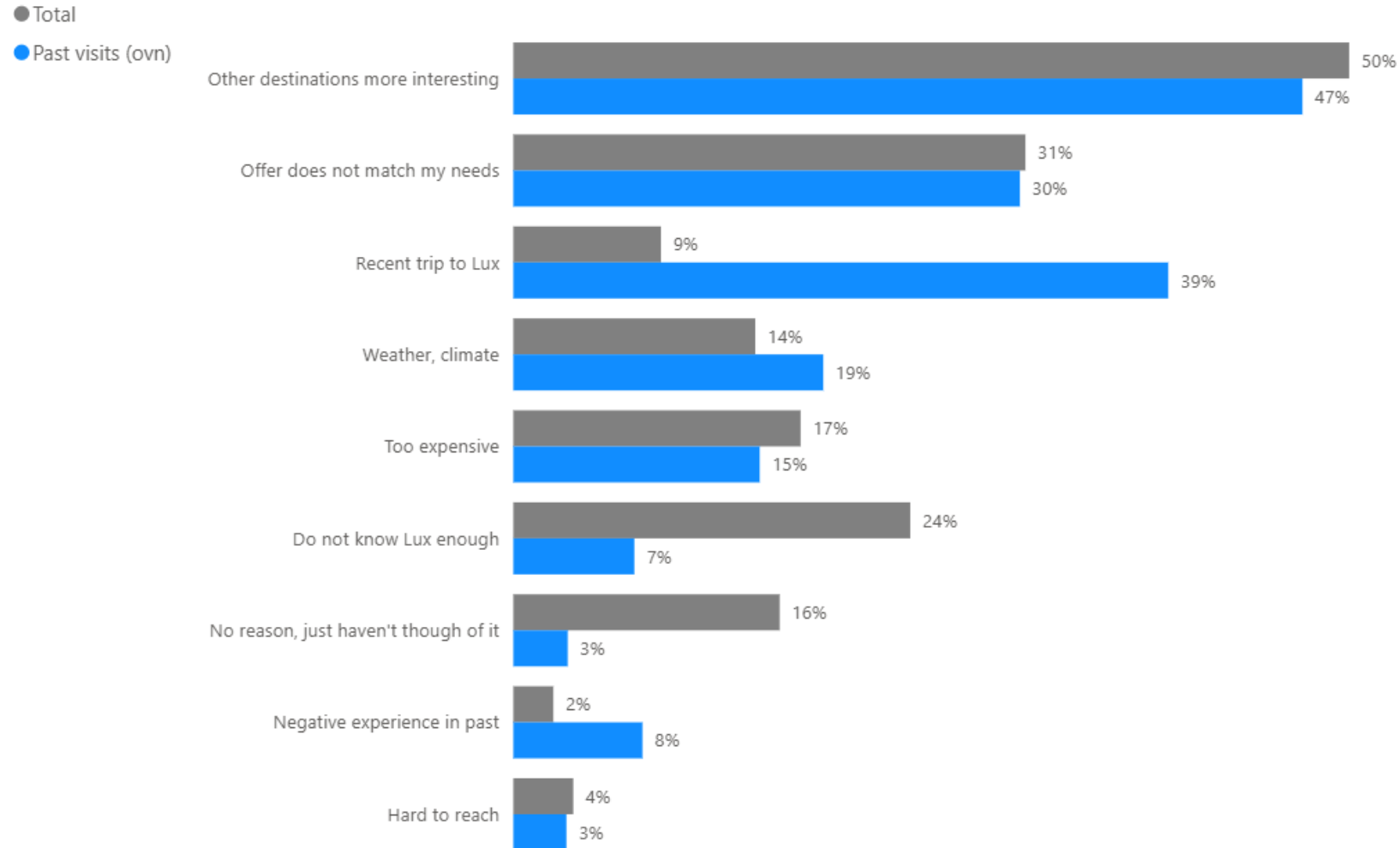


- SB have particularly high sympathy towards Luxembourg but relatively weaker travel intent, while PS have particularly high future travel intent, compared to sympathy levels.
- Comparatively high shares of sympathy and travel intent are being lost along the brand funnel for EXP, meaning this core target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

(*) next 3 years

Reasons for not choosing Luxembourg as a next destination

🇪🇺 — Average 13 European markets



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



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Other destinations more interesting	45%	53%	37%	52%	53%	54%	46%	70%	47%	47%	51%	56%	41%
Offer does not match my needs	19%	48%	16%	37%	32%	25%	29%	51%	31%	27%	22%	35%	29%
Do not know Lux enough	24%	14%	26%	21%	27%	40%	19%	19%	11%	18%	27%	27%	37%
Too expensive	15%	9%	11%	19%	16%	25%	19%	12%	16%	30%	26%	12%	15%
No reason, just haven't thought of it	28%	6%	27%	12%	18%	21%	19%	7%	13%	12%	8%	15%	21%
Weather, climate	5%	33%	8%	20%	13%	11%	11%	27%	15%	14%	9%	14%	10%
Recent trip to Lux	4%	9%	12%	11%	5%	16%	7%	8%	13%	5%	10%	8%	8%
Hard to reach	3%	0%	5%	3%	3%	6%	9%	1%	0%	4%	7%	3%	3%
Negative experience in past	1%	3%	5%	3%	1%	1%	4%	2%	3%	2%	4%	0%	0%

Reasons for not choosing Luxembourg as a next destination - LFT target segments

 — Average **13 European markets**

	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Other destinations more interesting	57%	48%	50%	47%	53%	37%
Offer does not match my needs	30%	30%	28%	32%	32%	25%
Do not know Lux enough	18%	28%	27%	27%	25%	19%
Too expensive	15%	22%	20%	14%	17%	22%
No reason, just haven't thought of it	18%	16%	20%	12%	15%	15%
Weather, climate	10%	13%	11%	19%	20%	5%
Recent trip to Lux	12%	7%	7%	13%	5%	11%
Hard to reach	4%	3%	6%	6%	3%	5%
Negative experience in past	2%	4%	2%	2%	2%	3%

- EXP, in particular, find other destinations more interesting.
- PS and LO often do not know Luxembourg well enough.
- NLA and SB find it more often too expensive
- Weather tends to be more of an issue for RS, PS and past visitors.

Reasons for not choosing Luxembourg as a next destination - Past Visitors & LFT target segments

— Average 13 European markets



	Do not know Lux enough	Hard to reach	Negative experience in past	No reason, just haven't thought of it	Offer does not match my needs	Other destinations more interesting	Recent trip to Lux	Too expensive	Weather, climate
Active, sports (interest)	18%	9%	3%	20%	20%	39%	9%	22%	15%
Camping, motorhome (interest)	19%	6%	2%	15%	19%	40%	25%	14%	16%
City (interest)	22%	7%	4%	17%	25%	47%	13%	17%	9%
Countryside (interest)	21%	4%	4%	22%	26%	44%	13%	14%	7%
Culinary (interest)	23%	5%	3%	17%	26%	49%	6%	21%	13%
Culture (interest)	25%	10%	2%	14%	26%	53%	13%	22%	9%
Cycling (interest)	25%	9%	10%	12%	16%	48%	14%	27%	9%
Events (interest)	19%	4%	4%	27%	22%	39%	8%	12%	22%
Family (interest)	23%	6%	2%	16%	24%	45%	11%	21%	12%
Hiking (interest)	25%	1%	2%	17%	26%	47%	11%	13%	8%
History, Unesco (interest)	19%	5%	2%	15%	25%	57%	12%	22%	9%
Industrial Heritage (interest)	10%	4%	7%	21%	23%	34%	21%	24%	13%
MTB (interest)	27%	7%	4%	14%	25%	44%	8%	16%	6%
Nature (interest)	19%	4%	2%	17%	29%	50%	14%	20%	10%
Remembrance (interest)	16%	10%	3%	16%	26%	42%	2%	25%	14%
Resting, relaxation (interest)	27%	6%	2%	17%	27%	48%	7%	21%	16%
Sightseeing (interest)	18%	4%	2%	13%	29%	52%	9%	19%	9%
Sustainability (interest)	23%	8%	5%	13%	16%	37%	11%	22%	18%
Wellness (interest)	26%	5%	3%	22%	32%	43%	7%	24%	12%
Wine (interest)	22%	4%	3%	19%	28%	47%	12%	12%	13%

- EXP, in particular, find other destinations more interesting.
- PS and LO often do not know Luxembourg well enough.
- NLA and SB find it more often too expensive
- Weather tends to be more of an issue for RS, PS and past visitors.

Potential preference of length of stay in Luxembourg



— Average 13 European markets

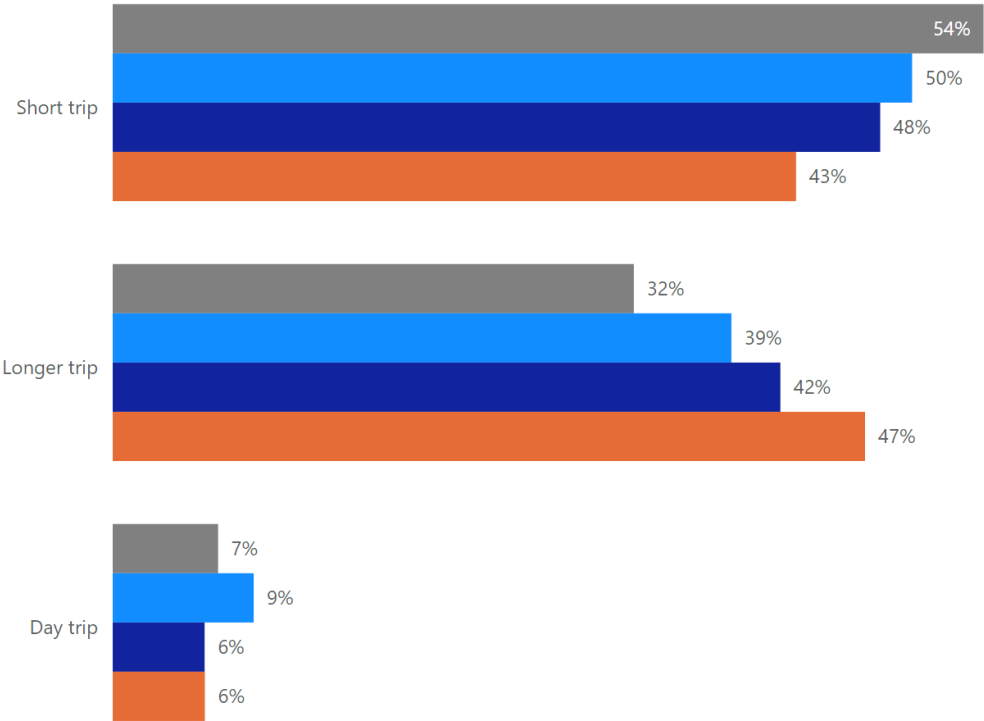


● Total

● Past visits (ovn)

● Travel intent Lux: high/very high

● Travel intent Lux: very high



Potential preference of length of stay in Luxembourg

🇪🇺 — Average **13 European markets**



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Short trip	65%	67%	44%	55%	59%	57%	54%	52%	36%	45%	48%	60%	61%
Longer trip	27%	13%	43%	32%	28%	31%	32%	30%	50%	41%	37%	30%	28%
Day trip	4%	13%	0%	6%	7%	0%	9%	6%	0%	7%	0%	5%	3%

	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Short trip	54%	56%	51%	45%	54%	62%
Longer trip	33%	29%	38%	43%	32%	25%
Day trip	5%	7%	8%	8%	6%	8%

- 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 of length of stay in Luxembourg

 — Average **13 European markets**



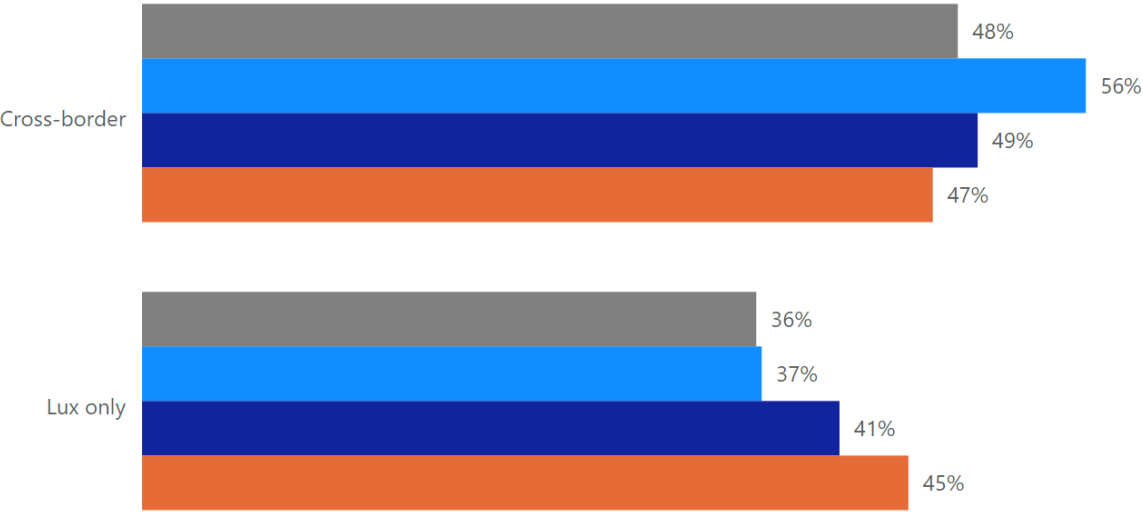
	Day trip	Longer trip	Short trip
Active, sports (interest)	7%	41%	48%
Camping, motorhome (interest)	7%	41%	45%
Castles (interest)	6%	39%	49%
City (interest)	6%	35%	54%
Countryside (interest)	6%	42%	46%
Culinary (interest)	6%	34%	53%
Culture (interest)	6%	37%	51%
Cycling (interest)	7%	43%	45%
Events (interest)	6%	42%	47%
Family (interest)	6%	36%	50%
Hiking (interest)	6%	40%	49%
History, Unesco (interest)	6%	37%	51%
Industrial Heritage (interest)	6%	45%	44%
Luxury (interest)	7%	41%	47%
MTB (interest)	7%	47%	42%
Nature (interest)	6%	37%	50%
Remembrance (interest)	7%	37%	51%
Resting, relaxation (interest)	6%	35%	52%
Sightseeing (interest)	6%	31%	57%
Sustainability (interest)	6%	41%	46%
Wellness (interest)	7%	40%	48%
Wine (interest)	6%	40%	49%

Potential preference for cross-border travel when visiting Luxembourg

🇪🇺 — Average 7 European markets*



- Total
- Past visits (ovn)
- Travel intent Lux: high/very high
- Travel intent Lux: very high



* DE-FR-UK-CH-AT-ES-IT

Potential preference for cross-border travel when visiting Luxembourg

 — Average **7 European markets***



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Cross-border	49%			46%	42%		54%			53%		51%	43%
Lux only	36%			40%	41%		35%			32%		34%	36%

	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Cross-border	52%	46%	48%	54%	44%	48%
Lux only	34%	35%	42%	39%	38%	34%

- 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.

* DE-FR-UK-CH-AT-ES-IT

Potential preference for cross-border travel when visiting Luxembourg

— Average 7 European markets*



	Cross-border	Lux only
Active, sports (interest)	52%	39%
Camping, motorhome (interest)	52%	37%
Castles (interest)	48%	40%
City (interest)	48%	39%
Countryside (interest)	49%	38%
Culinary (interest)	47%	38%
Culture (interest)	50%	38%
Cycling (interest)	53%	37%
Events (interest)	52%	38%
Family (interest)	48%	38%
Hiking (interest)	51%	37%
History, Unesco (interest)	49%	38%
Industrial Heritage (interest)	49%	42%
Luxury (interest)	47%	42%
MTB (interest)	52%	41%
Nature (interest)	49%	37%
Remembrance (interest)	49%	41%
Resting, relaxation (interest)	46%	38%
Sightseeing (interest)	50%	37%
Sustainability (interest)	48%	40%
Wellness (interest)	47%	40%
Wine (interest)	49%	40%

- 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. Niche themes can thus be a driver for prolongation of stay.
- 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.

* DE-FR-UK-CH-AT-ES-IT

• 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.

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



Potential preference of accommodation in Luxembourg



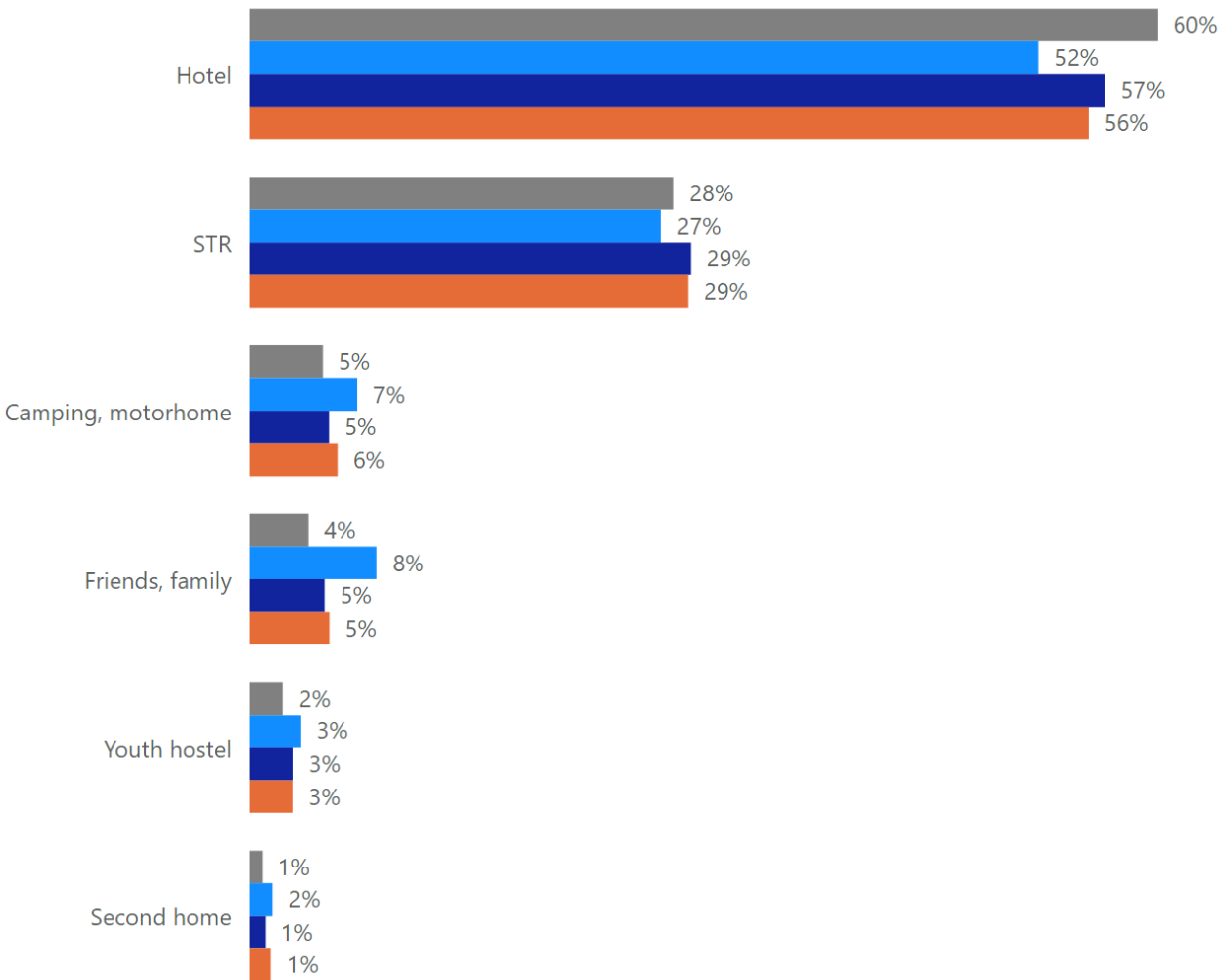
— Average 9 European markets*

● Total

● Past visits (ovn)

● Travel intent Lux: high/very high

● Travel intent Lux: very high



* DE-FR-NL-BE-UK-CH-AT-ES-IT



Potential preference of accommodation in Luxembourg

 — Average **9 European markets***

	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Hotel	71%	63%		48%	60%		65%	46%		63%		58%	67%
STR	19%	25%		40%	27%		26%	36%		29%		26%	26%
Camping, motorhome	5%	6%		4%	6%		2%	10%		2%		6%	3%
Friends, family	2%	4%		5%	4%		3%	4%		4%		6%	2%
Youth hostel	2%	2%		3%	2%		3%	2%		2%		2%	2%
Second home	1%	0%		1%	1%		1%	1%				1%	

	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Hotel	62%	57%	50%	52%	64%	63%
STR	28%	31%	29%	31%	27%	23%
Camping, motorhome	4%	5%	12%	5%	4%	5%
Friends, family	4%	4%	4%	7%	3%	6%
Youth hostel	2%	3%	4%	3%	2%	2%
Second home	1%	1%	1%	2%	1%	1%

* DE-FR-NL-BE-UK-CH-AT-ES-IT

- Compared to past visitors, future new potential visitors more often seem to favour hotels and short-term rentals, at the expense of camping and staying at friends/family.
- NLA still would consider substantially more often camping, but also youth hostels.
- PS would consider most accommodation types more often than the average traveller, at the expense of hotels.

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



Potential preference of accommodation in Luxembourg

 — Average **9 European markets***

	Camping, motorhome	Friends, family	Hotel	Second home	STR	Youth hostel
Active, sports (interest)	6%	5%	50%	1%	33%	4%
Castles (interest)	5%	4%	60%	1%	28%	2%
City (interest)	3%	4%	62%	1%	27%	2%
Countryside (interest)	7%	6%	50%	1%	32%	4%
Culinary (interest)	4%	3%	62%	1%	28%	2%
Culture (interest)	4%	4%	60%	1%	28%	2%
Cycling (interest)	8%	6%	50%	2%	31%	3%
Events (interest)	5%	6%	55%	1%	30%	4%
Family (interest)	5%	5%	57%	1%	31%	2%
Hiking (interest)	7%	5%	54%	1%	31%	3%
History, Unesco (interest)	5%	4%	61%	1%	27%	2%
Industrial Heritage (interest)	5%	7%	53%	1%	30%	3%
Luxury (interest)	4%	5%	60%	2%	26%	3%
MTB (interest)	8%	8%	46%	2%	31%	4%
Nature (interest)	6%	4%	58%	1%	30%	2%
Remembrance (interest)	5%	5%	54%	1%	31%	3%
Resting, relaxation (interest)	4%	4%	60%	1%	29%	2%
Sightseeing (interest)	4%	3%	60%	1%	30%	2%
Sustainability (interest)	5%	6%	54%	1%	31%	3%
Wellness (interest)	5%	5%	58%	1%	27%	3%
Wine (interest)	5%	5%	58%	1%	29%	3%

* DE-FR-NL-BE-UK-CH-AT-ES-IT



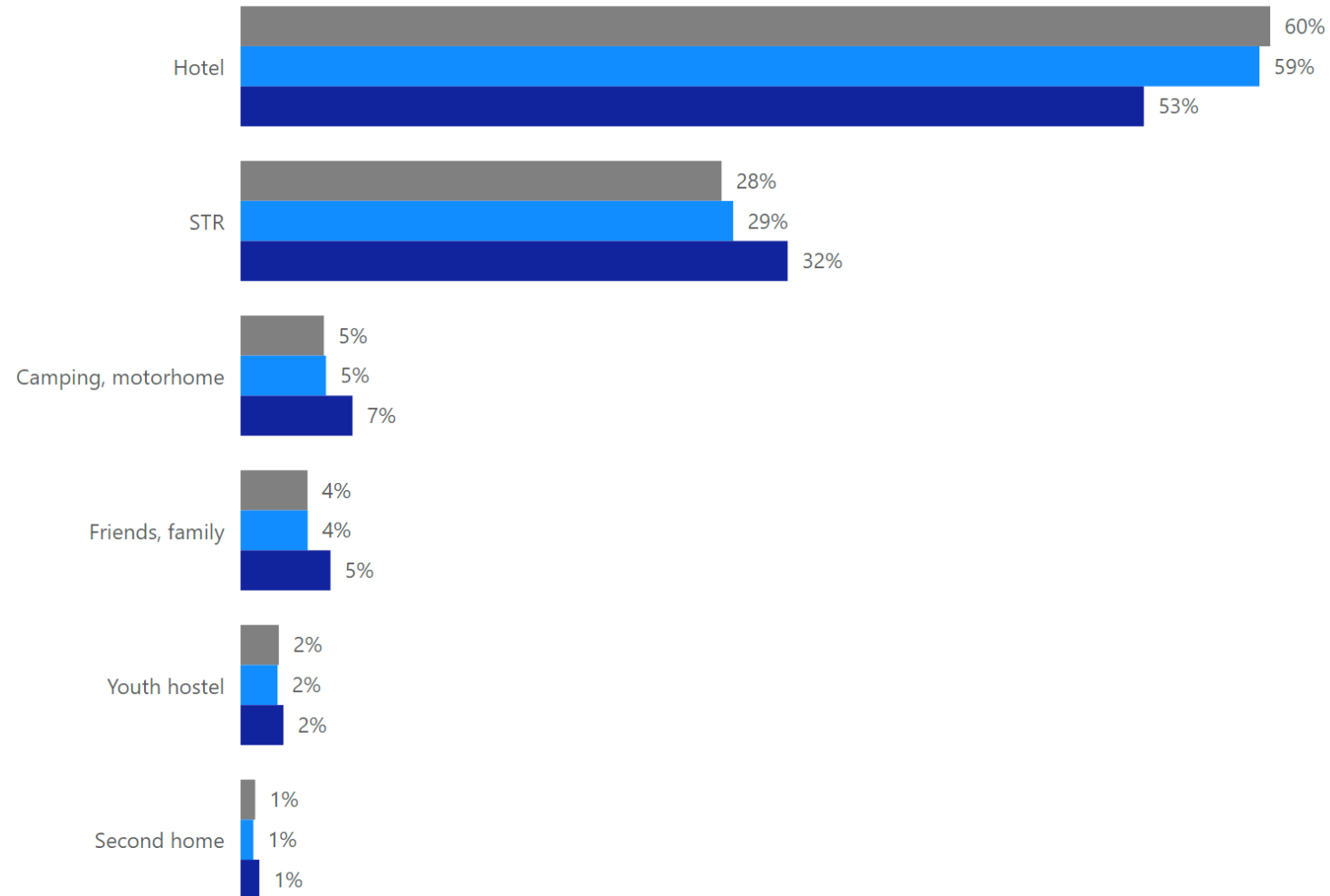
Potential preference of accommodation in Luxembourg

 — Average **9 European markets***

● Total

● Cross-border

● Longer trip



* DE-FR-NL-BE-UK-CH-AT-ES-IT



Potential preference of accommodation in Luxembourg

 — Average **9 European markets***

● Total

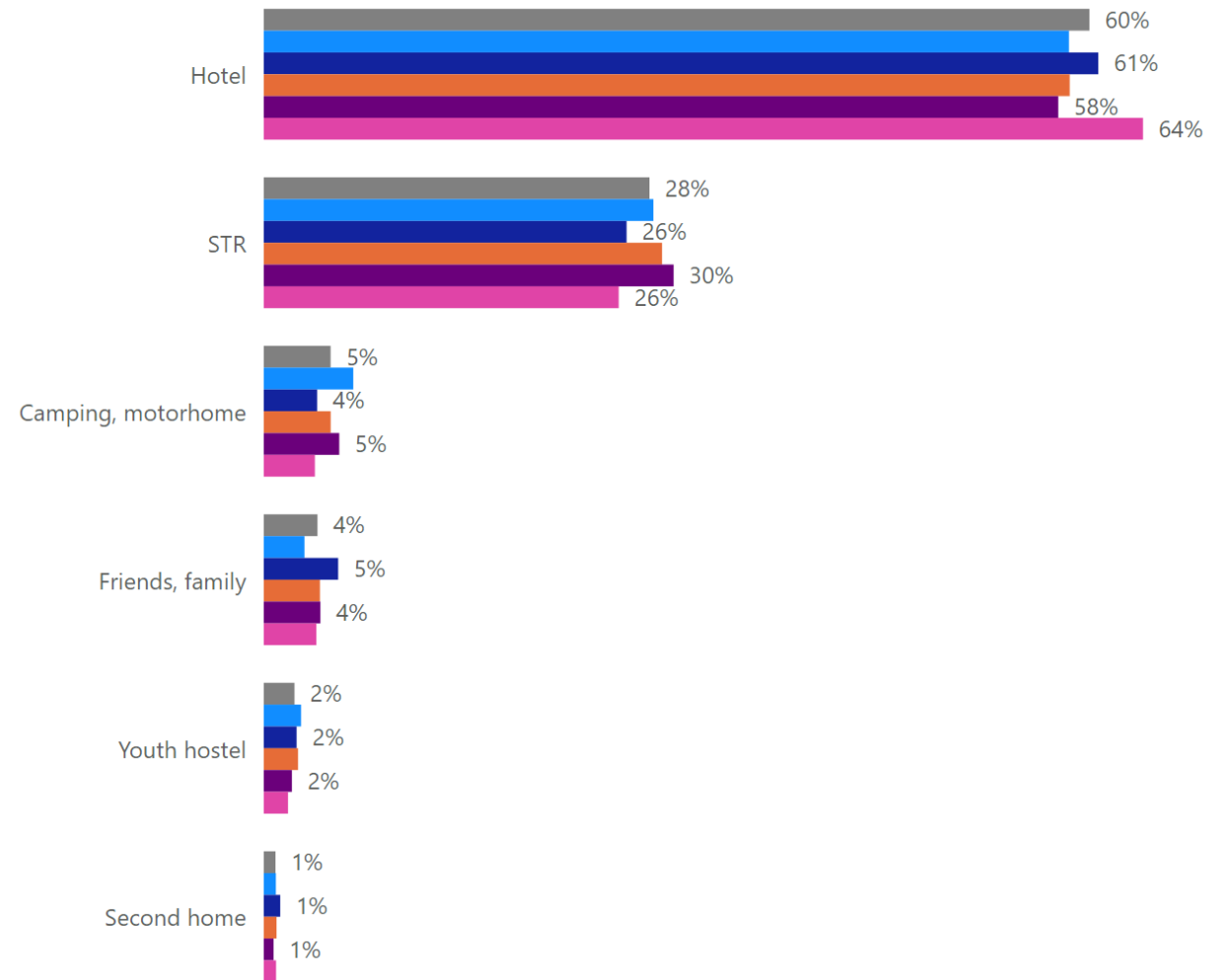
● Generally prefer lesser-known sites

● Iconic sites mostly

● New destination

● Organised myself

● Quality-oriented



* DE-FR-NL-BE-UK-CH-AT-ES-IT



2

Spontaneous
brand associations

Spontaneous brand associations : Key insights



- **Luxembourg is often associated with being a small and wealthy country.** The tourism profile is underrepresented in spontaneous perceptions.
- **Visitors hold a more nuanced, positive image.** Respondents with visiting experience associate Luxembourg more frequently with castles, nature, culture, the old town and specific experience-related terms. This shows that the on-the-ground tourism reality is convincing — but is insufficiently known.
- **Market-specific associations serve as communication anchors.** Belgians and the Dutch bring stronger nature and Ardennes associations, the French think of the capital city, Germans of castles and landscapes. These baseline associations shape the communication context in each market.



Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations



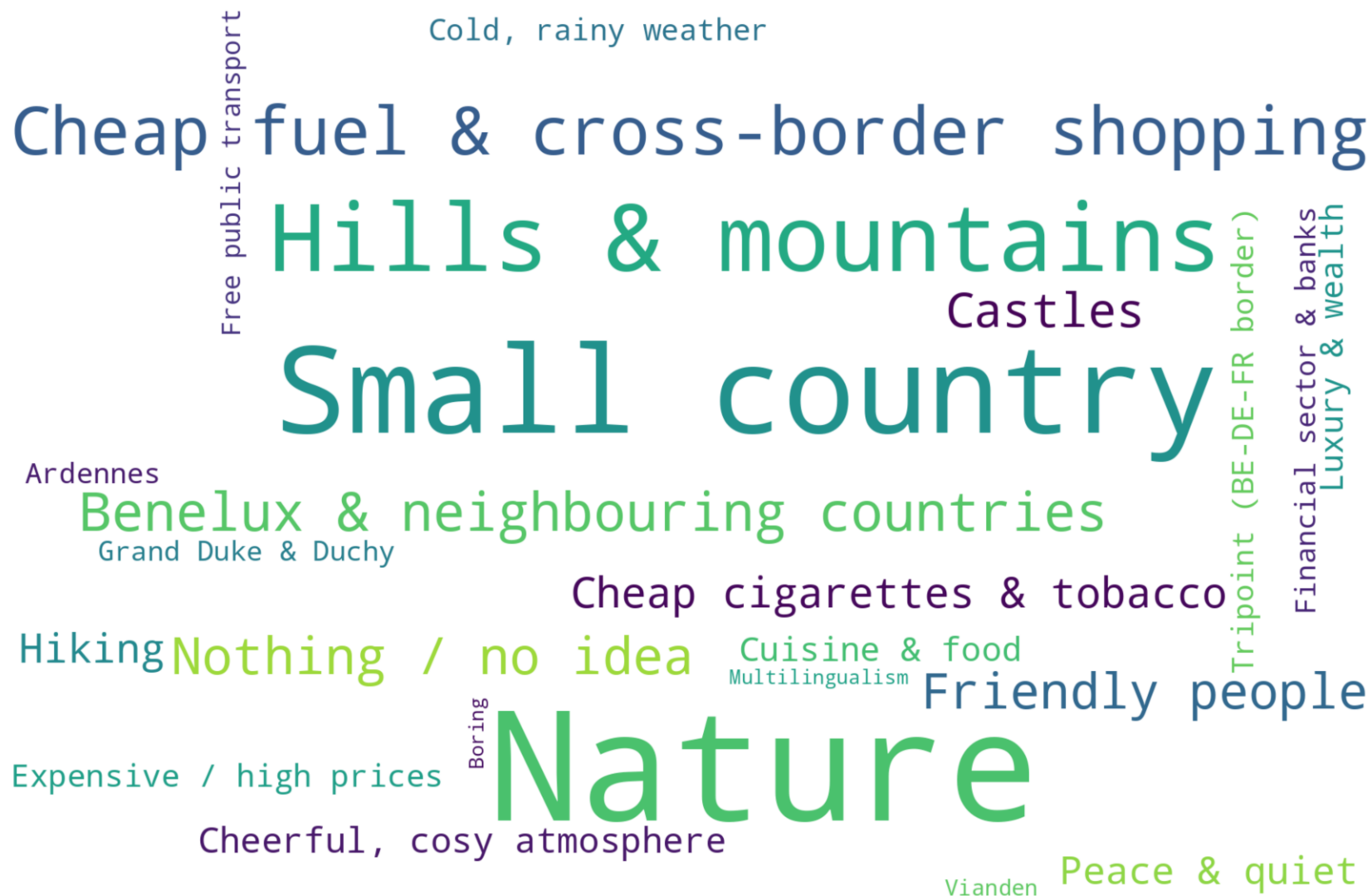
Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

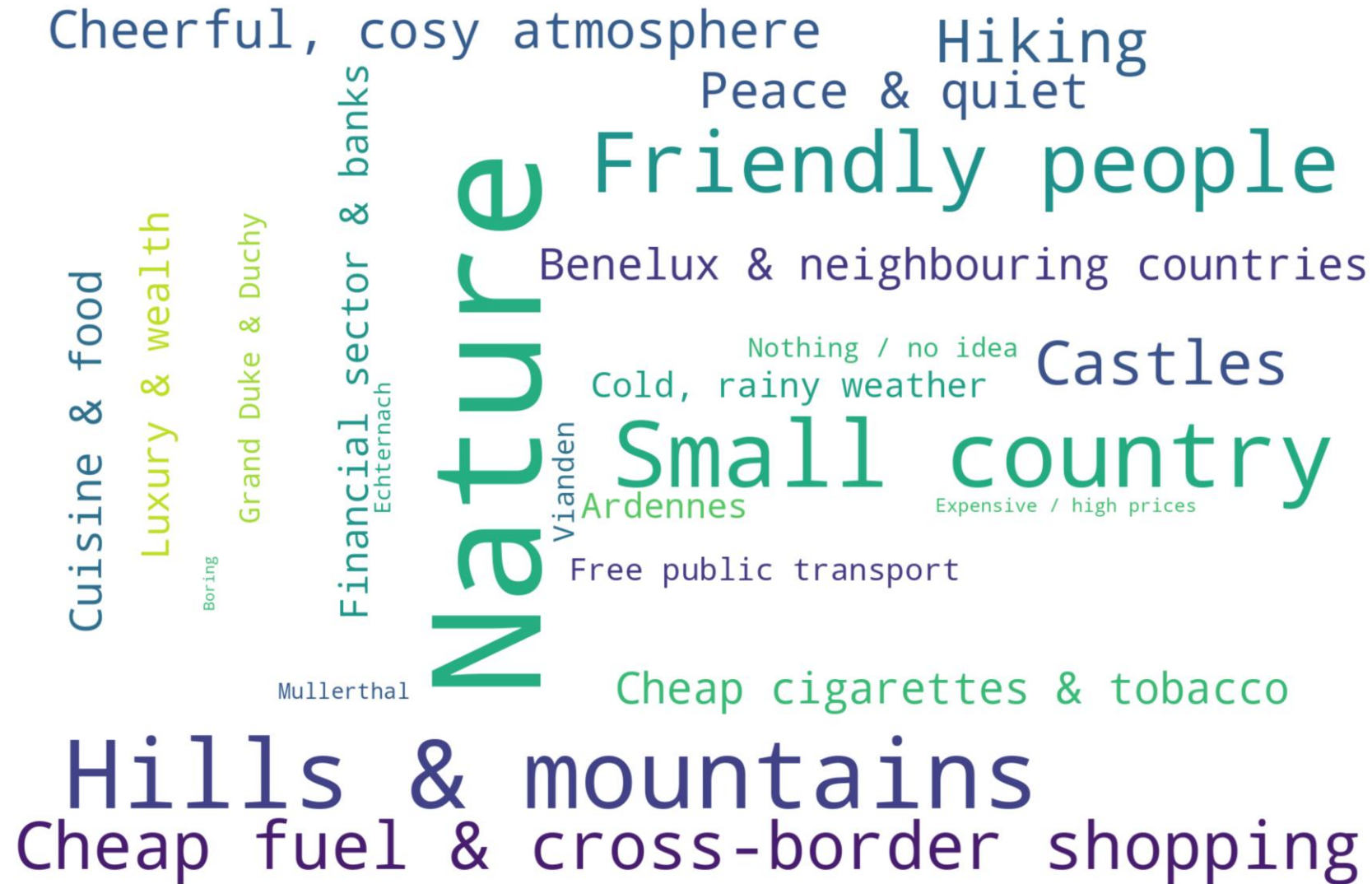
Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud

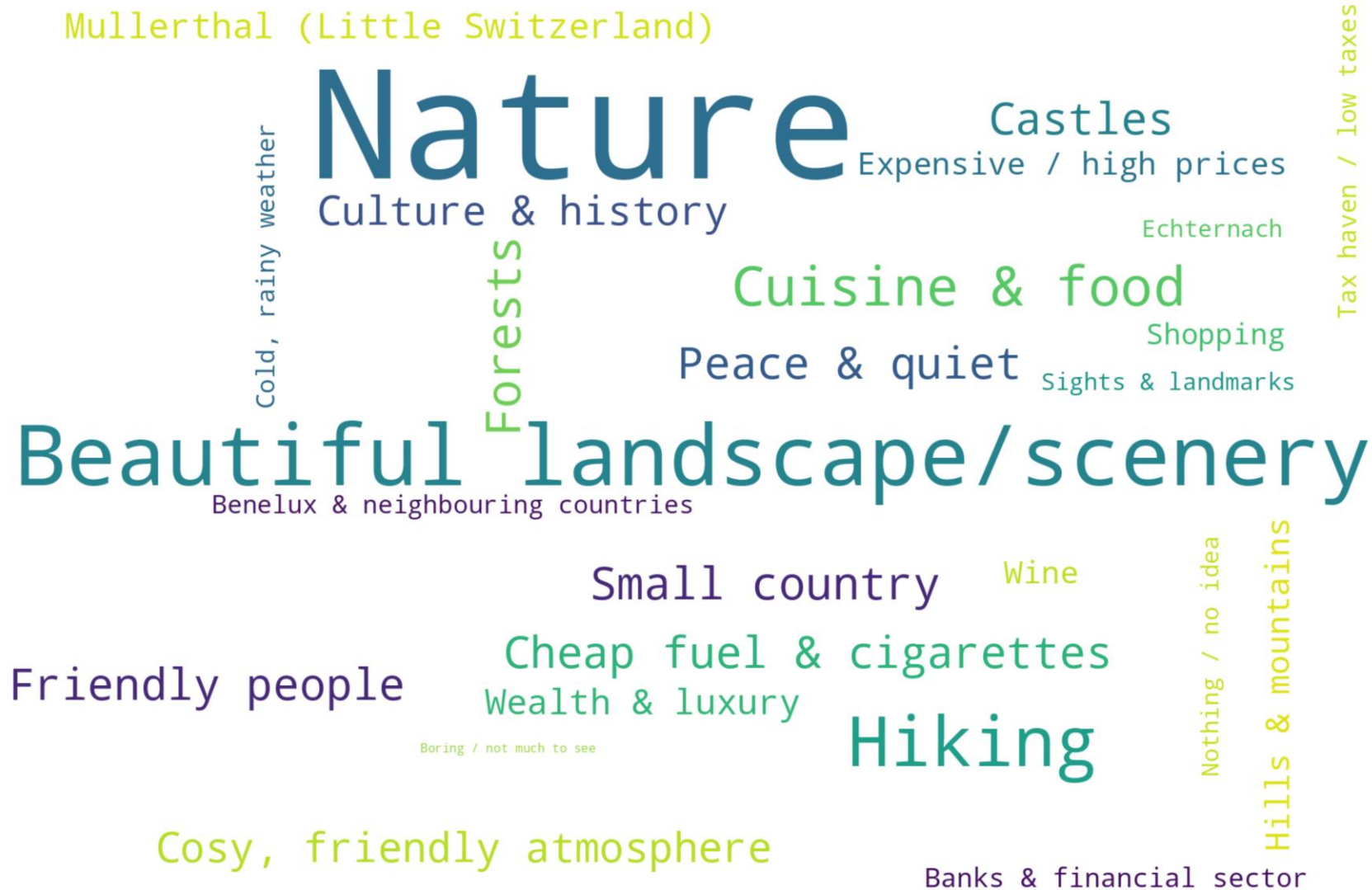




Spontaneous brand associations



Associations with Luxembourg — word cloud – PAST VISITORS ONLY

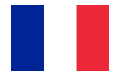




Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations



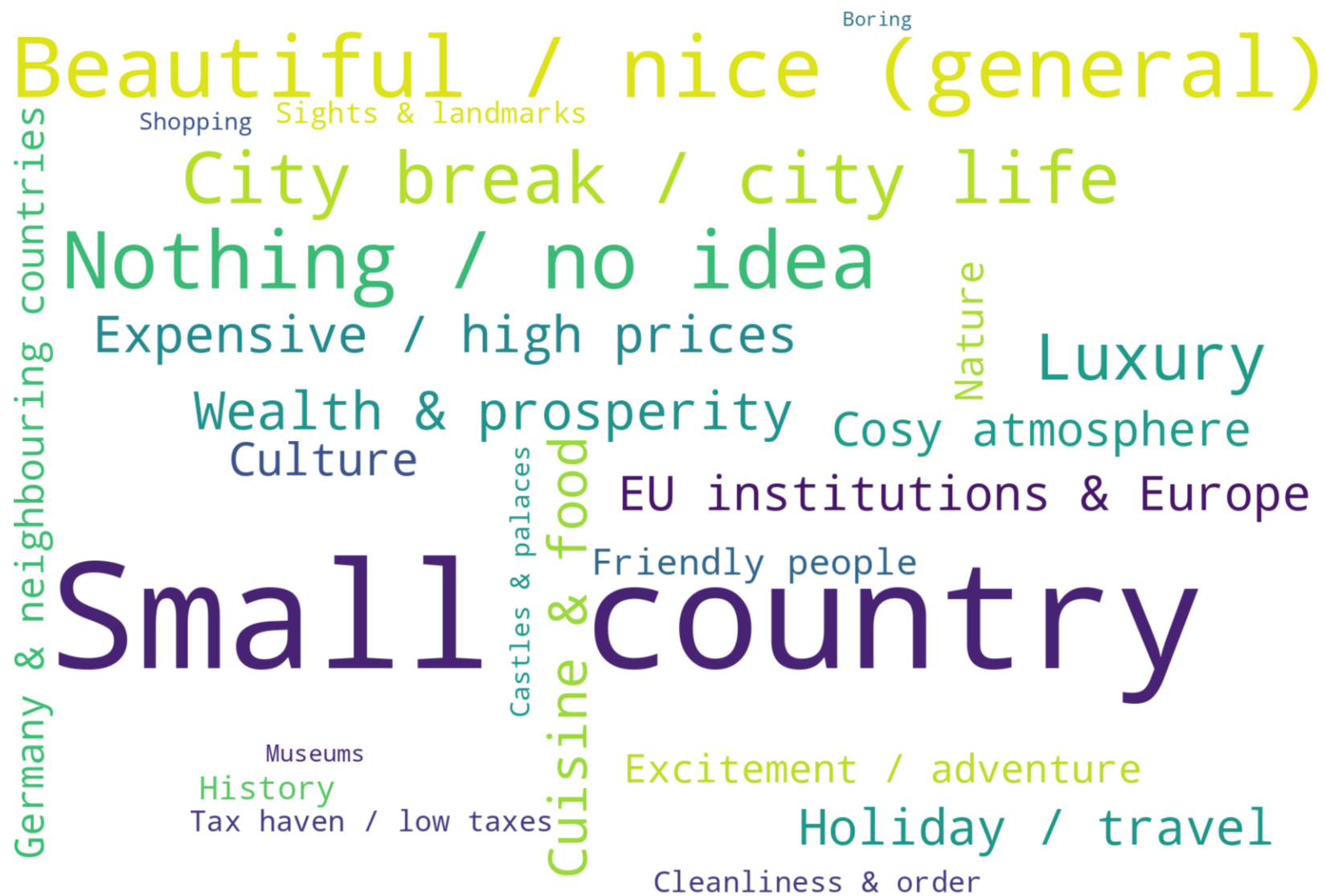
Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

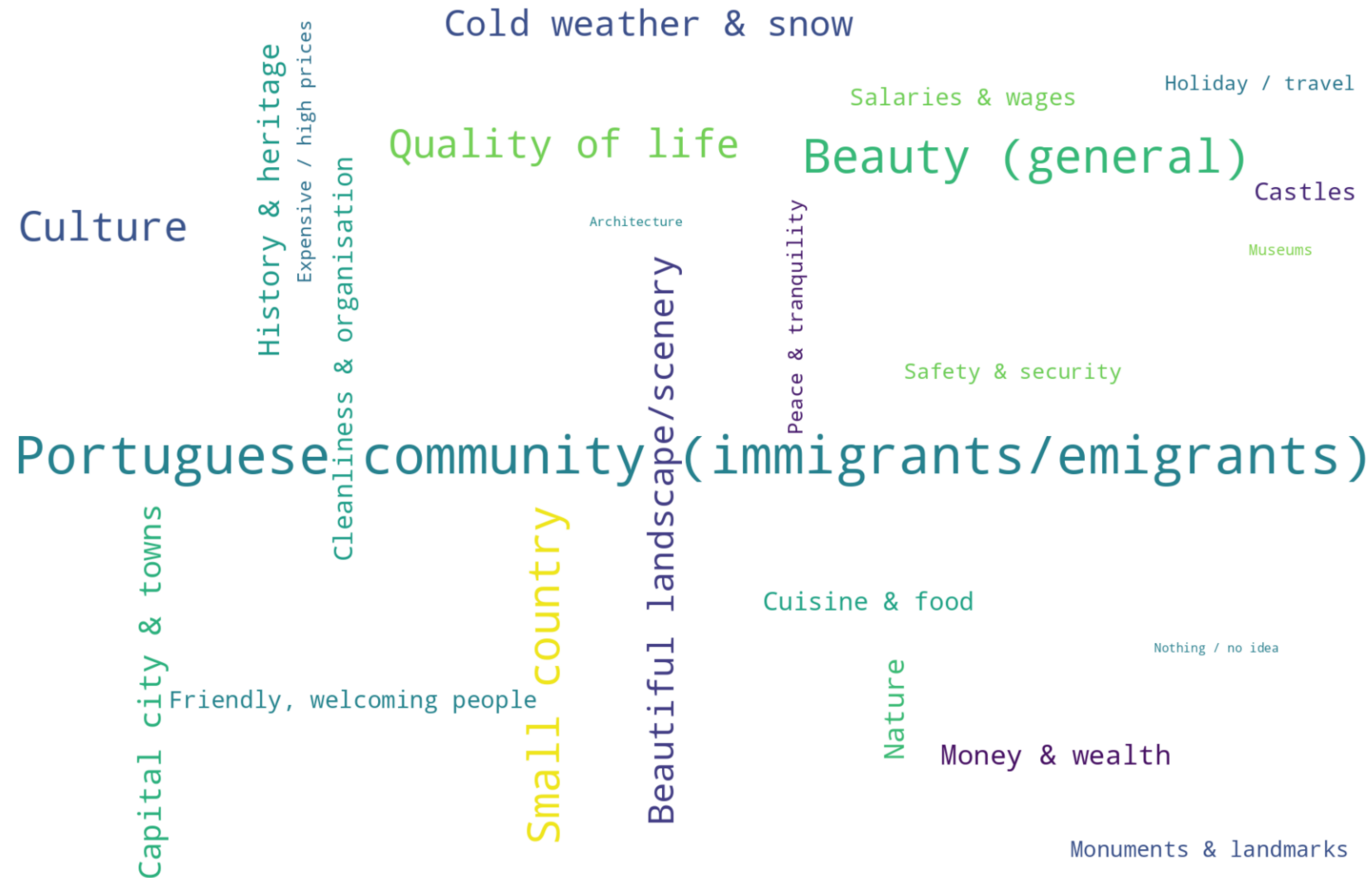
Associations with Luxembourg — word cloud – PAST VISITORS ONLY





Spontaneous brand associations

Associations with Luxembourg — word cloud





Spontaneous brand associations

Associations with Luxembourg — word cloud – PAST VISITORS ONLY





3a

Theme potential

Theme potential (general interest & Luxembourg's suitability) : Key insights



- **Culinary, relaxation and nature are the top 3 holiday themes across Europe.** At 54%, 52% and 48% agreement respectively, these three themes dominate general holiday demand — regardless of a specific destination. They are followed by sightseeing (46%) and family holidays (44%).
- **Marked gap between mainstream interest and niche themes.** Themes such as hiking (28%), wine (24%), cycling (16%) or industrial heritage (17%) rank significantly lower in the overall market. However, these niche themes hold strategic importance for Luxembourg, as they often address highly engaged segments and contribute to extending length of stay.
- **Niche themes as drivers for longer stays.** Potential Luxembourg visitors with interest in cycling, MTB, countryside holidays, camping, industrial heritage and remembrance tourism more frequently prefer longer stays. These themes are therefore well suited for targeted strategies to increase length of stay.
- **Themes correlate in clusters.** There are strong correlations between related themes: nature-hiking-cycling form one cluster, as do culture-history-architecture and culinary-wine-relaxation. This enables bundled theme communication.
- **City tourism is Luxembourg's strongest theme competence.** At 38%, "City" leads the suitability ranking, followed by culinary (36%), relaxation (35%) and nature (35%). Luxembourg is primarily perceived as a city-trip destination complemented by gastronomy and nature experiences.
- **Considerable gap between demand and perceived suitability.** Comparing "General Theme Interest vs. Luxembourg's Theme Suitability" reveals that for virtually all themes, Luxembourg's perceived suitability falls significantly below the general demand level. The gap is particularly large for fun/entertainment, events, adventure/action and sustainability — indicating substantial communication potential.
- **City and architecture outperform in relative terms.** "City" and "Architecture/Townscapes" achieve the highest relative suitability in the interest vs. suitability scatter plot. These themes are Luxembourg's strongest positioning anchors, upon which the broader portfolio can be built.
- **Luxury is more strongly associated with Luxembourg than expected.** Luxury tourism ranks relatively low in general interest but is associated with Luxembourg at above-average levels. This reflects the destination's image as a wealthy country and can be leveraged for a premium segment.



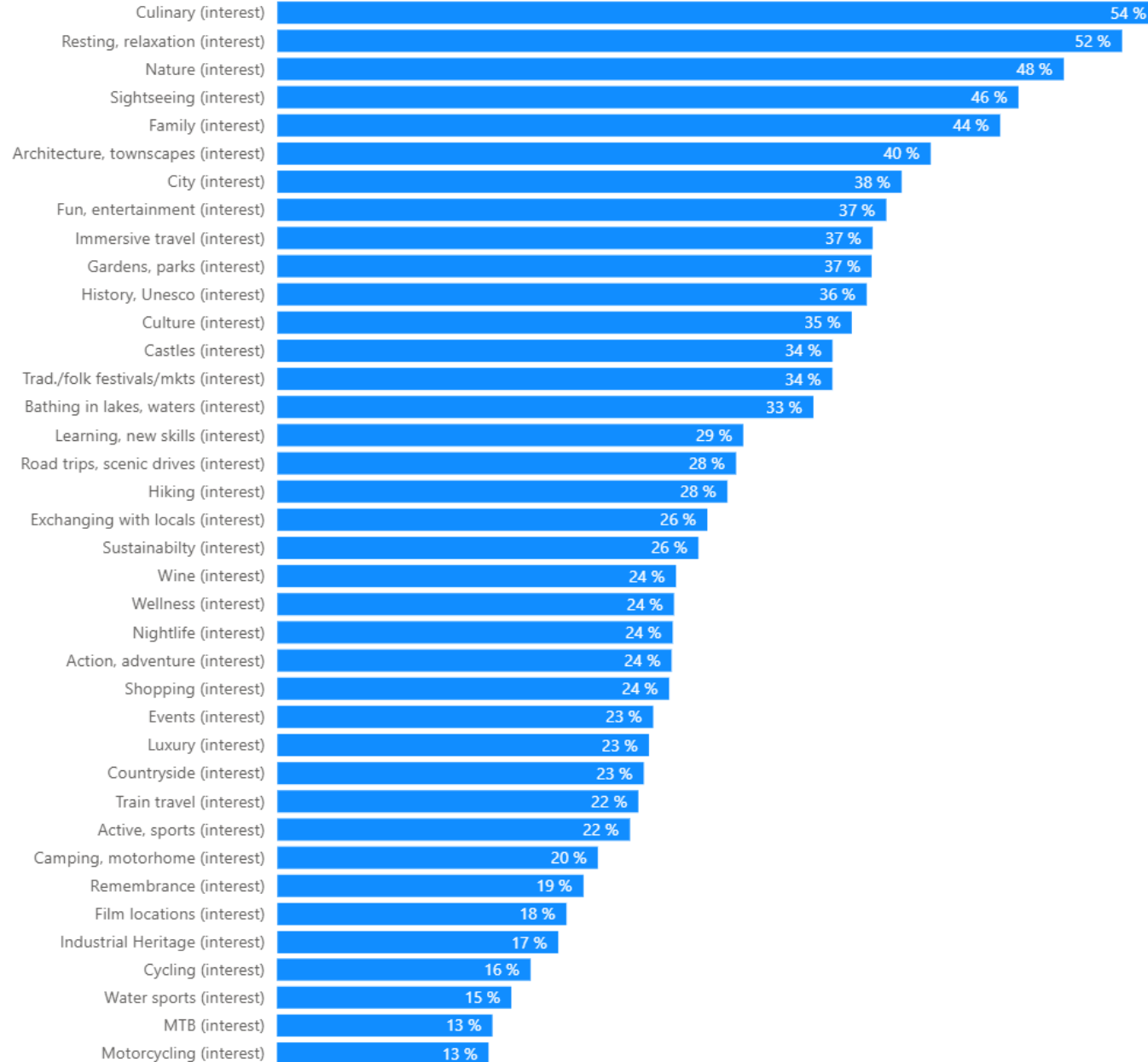
3_a

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.

Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report.

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

General Theme Interest

— Average 14 European source markets



	Past visits (ovn)	Travel intent Lux: high/very high
Culinary (interest)	55%	61%
Nature (interest)	54%	56%
Resting, relaxation (interest)	52%	56%
Sightseeing (interest)	50%	55%
Family (interest)	45%	49%
Architecture, townscapes (interest)	45%	49%
City (interest)	43%	46%
History, Unesco (interest)	43%	45%
Gardens, parks (interest)	43%	44%
Immersive travel (interest)	41%	45%
Culture (interest)	42%	43%
Castles (interest)	40%	43%
Fun, entertainment (interest)	39%	43%
Trad./folk festivals/mkts (interest)	39%	42%
Bathing in lakes, waters (interest)	37%	39%
Learning, new skills (interest)	33%	36%
Road trips, scenic drives (interest)	33%	35%
Hiking (interest)	33%	33%
Exchanging with locals (interest)	33%	32%
Sustainability (interest)	31%	32%
Wine (interest)	32%	31%
Events (interest)	29%	29%
Nightlife (interest)	28%	29%
Train travel (interest)	29%	28%
Shopping (interest)	28%	29%
Wellness (interest)	28%	28%
Action, adventure (interest)	27%	29%
Countryside (interest)	28%	27%
Luxury (interest)	27%	27%
Active, sports (interest)	27%	26%
Camping, motorhome (interest)	26%	23%
Remembrance (interest)	23%	24%
Industrial Heritage (interest)	23%	22%
Film locations (interest)	20%	22%
Cycling (interest)	22%	19%
Water sports (interest)	23%	17%
MTB (interest)	19%	16%
Motorcycling (interest)	17%	15%

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 this and following pages.

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

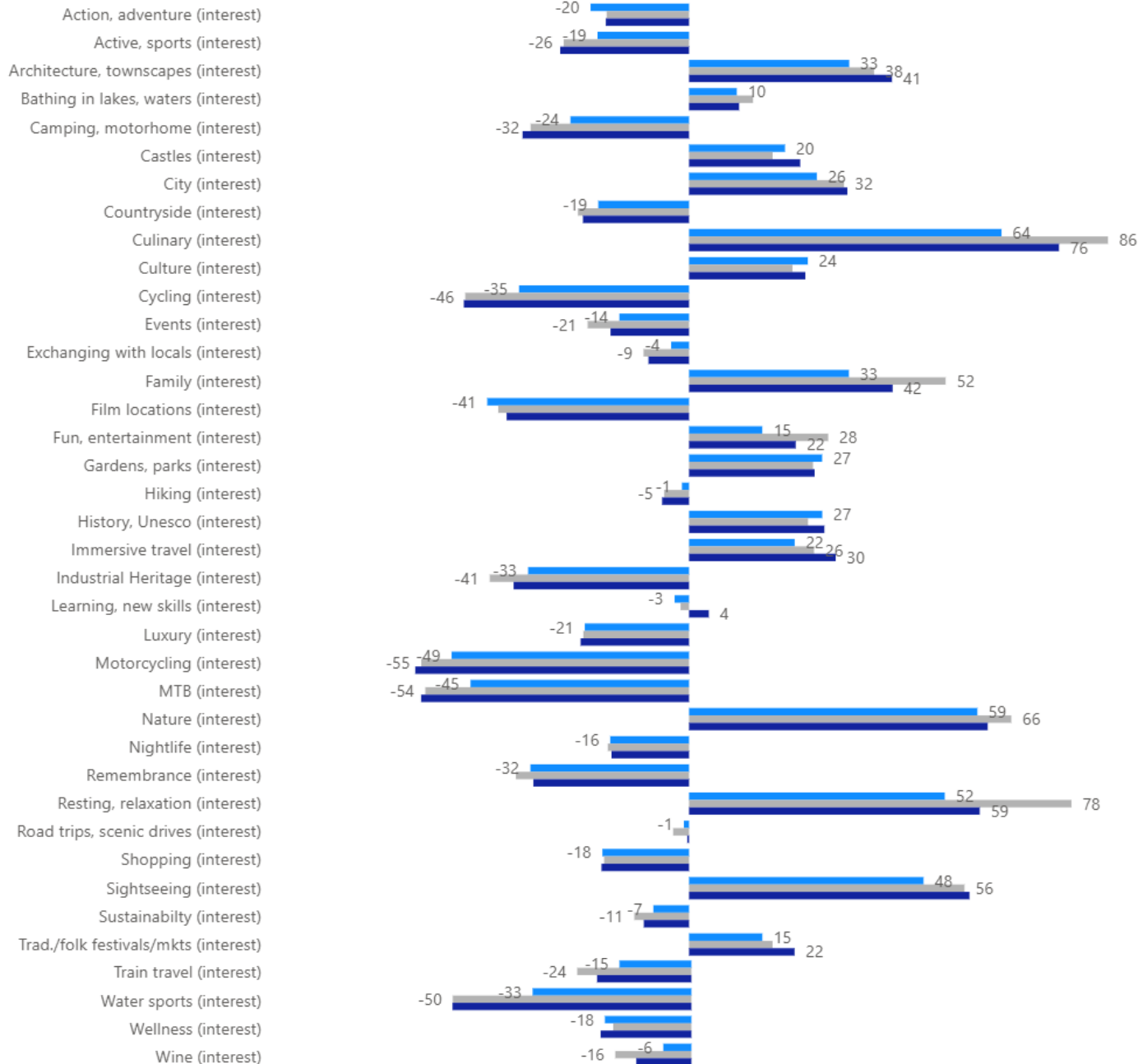


General Theme Interest

● Past visits (ovn)

● Total

● Travel intent Lux: high/very high



This chart shows, for each theme, the deviation from the average value across all themes for, respectively, past visitors, all respondents and respondents with high or very high travel intent to Luxembourg next years. This allows for a better comparison between themes by sub-segments.

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

General Theme Interest



— Average **14 European source markets**



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Culinary (interest)	58%	51%	50%	49%	54%	59%	54%	49%	72%	51%	52%	54%	49%
Resting, relaxation (interest)	55%	58%	47%	45%	54%	56%	47%	59%	68%	46%	45%	48%	49%
Nature (interest)	51%	53%	43%	47%	50%	40%	53%	53%	64%	47%	35%	48%	43%
Family (interest)	39%	50%	41%	47%	39%	47%	39%	46%	71%	46%	37%	37%	40%
City (interest)	42%	34%	36%	30%	39%	45%	48%	37%	36%	48%	28%	38%	38%
History, Unesco (interest)	34%	29%	28%	35%	33%	34%	54%	31%	53%	45%	29%	30%	36%
Culture (interest)	33%	28%	29%	33%	33%	33%	51%	27%	55%	45%	26%	33%	35%
Castles (interest)	36%	29%	26%	31%	36%	31%	51%	30%	46%	43%	23%	30%	30%
Sightseeing (interest)	47%	42%		46%	44%		54%	44%		46%		40%	47%
Architecture, townscapes (interest)	41%	34%		40%	39%		50%	35%		44%		37%	43%
Hiking (interest)	27%	37%	24%	26%	28%	18%	38%	39%	30%	25%	18%	25%	25%
Fun, entertainment (interest)	39%	43%		38%	37%		30%	41%		34%		35%	39%
Sustainability (interest)	23%	19%	21%	24%	24%	34%	29%	19%	47%	23%	24%	24%	24%
Immersive travel (interest)	42%	29%		38%	40%		45%	28%		37%		38%	32%
Wine (interest)	26%	21%	23%	23%	25%	28%	26%	22%	32%	21%	24%	24%	24%
Wellness (interest)	25%	19%	25%	21%	26%	22%	22%	21%	55%	21%	14%	26%	19%
Nightlife (interest)	23%	19%	26%	23%	24%	31%	25%	23%	31%	28%	19%	24%	21%
Shopping (interest)	21%	22%	29%	22%	25%	31%	21%	26%	21%	20%	25%	26%	25%
Events (interest)	25%	17%	20%	27%	24%	28%	24%	22%	28%	21%	19%	24%	21%
Luxury (interest)	21%	18%	32%	19%	22%	34%	15%	27%	22%	18%	23%	20%	24%
Countryside (interest)	20%	18%	23%	22%	22%	25%	24%	21%	31%	22%	23%	18%	25%
Train travel (interest)	22%	16%	19%	21%	22%	25%	22%	18%	31%	24%	20%	26%	22%
Active, sports (interest)	24%	18%	20%	21%	25%	23%	21%	23%	25%	20%	18%	25%	19%
Learning, new skills (interest)	26%	23%		35%	27%		41%	23%		28%		31%	23%
Camping, motorhome (interest)	21%	16%	22%	19%	22%	20%	15%	23%	23%	17%	20%	21%	17%
Exchanging with locals (interest)	29%	20%		33%	30%		28%	24%		23%		29%	22%
Industrial Heritage (interest)	17%	12%	14%	19%	19%	20%	16%	17%	23%	14%	15%	19%	20%
Action, adventure (interest)	27%	23%		24%	27%		21%	28%		21%		26%	22%
Cycling (interest)	19%	20%	12%	18%	23%	17%	10%	23%	10%	10%	11%	19%	12%
MTB (interest)	16%	11%	14%	14%	16%	13%	11%	17%	13%	11%	11%	16%	11%
Motorcycling (interest)	17%	10%	14%	12%	16%	12%	11%	17%	11%	10%	14%	18%	10%
Remembrance (interest)	19%	17%		24%	20%		18%	19%		17%		18%	17%
Film locations (interest)	17%	14%		19%	18%		20%	16%		18%		20%	19%
Gardens, parks (interest)							40%			33%			
Trad./folk festivals/mkts (interest)							39%			30%			
Bathing in lakes, waters (interest)							32%			33%			
Road trips, scenic drives (interest)							32%			25%			
Water sports (interest)							13%			16%			

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 this and following pages.

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

Average Europe |

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

General Theme Interest



— Average **14 European source markets**



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Culinary (interest)	57%	50%	45%	54%	58%	49%
Nature (interest)	55%	44%	62%	49%	44%	45%
Resting, relaxation (interest)	41%	50%	47%	47%	68%	43%
Sightseeing (interest)	59%	40%	41%	47%	38%	45%
Family (interest)	41%	50%	38%	44%	46%	40%
Architecture, townscapes (interest)	51%	35%	36%	46%	33%	42%
City (interest)	47%	35%	32%	41%	33%	41%
Gardens, parks (interest)	38%	31%	42%	38%	35%	38%
Fun, entertainment (interest)	37%	37%	33%	43%	40%	32%
History, Unesco (interest)	48%	31%	37%	39%	28%	36%
Immersive travel (interest)	49%	30%	34%	41%	29%	34%
Culture (interest)	47%	30%	36%	39%	27%	35%
Castles (interest)	41%	32%	35%	38%	28%	35%
Bathing in lakes, waters (interest)	32%	30%	37%	38%	34%	32%
Trad./folk festivals/mkts (interest)	40%	28%	33%	33%	30%	31%
Hiking (interest)	29%	24%	53%	32%	21%	28%
Learning, new skills (interest)	38%	22%	27%	35%	23%	28%
Road trips, scenic drives (interest)	30%	26%	28%	32%	27%	27%
Sustainability (interest)	26%	26%	32%	33%	22%	27%
Exchanging with locals (interest)	34%	22%	29%	35%	20%	26%
Action, adventure (interest)	26%	22%	31%	36%	20%	22%
Wellness (interest)	21%	23%	29%	34%	25%	24%
Wine (interest)	26%	21%	29%	34%	22%	25%
Nightlife (interest)	27%	22%	24%	34%	22%	23%
Active, sports (interest)	21%	18%	40%	31%	18%	23%
Countryside (interest)	22%	22%	35%	26%	19%	24%
Shopping (interest)	21%	23%	22%	33%	26%	23%
Events (interest)	26%	20%	26%	34%	19%	23%
Train travel (interest)	24%	21%	27%	31%	17%	26%
Luxury (interest)	20%	19%	24%	36%	25%	21%
Camping, motorhome (interest)	20%	19%	29%	28%	15%	20%
Remembrance (interest)	21%	17%	22%	27%	15%	21%
Film locations (interest)	18%	16%	21%	29%	15%	18%
Industrial Heritage (interest)	20%	15%	24%	25%	13%	19%
Cycling (interest)	15%	14%	31%	24%	12%	18%
Water sports (interest)	13%	17%	24%	24%	13%	10%
MTB (interest)	12%	12%	26%	25%	10%	17%
Motorcycling (interest)	12%	12%	19%	23%	10%	16%

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 this and the following pages.

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

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

Correlation between themes



— Average **14** European source markets



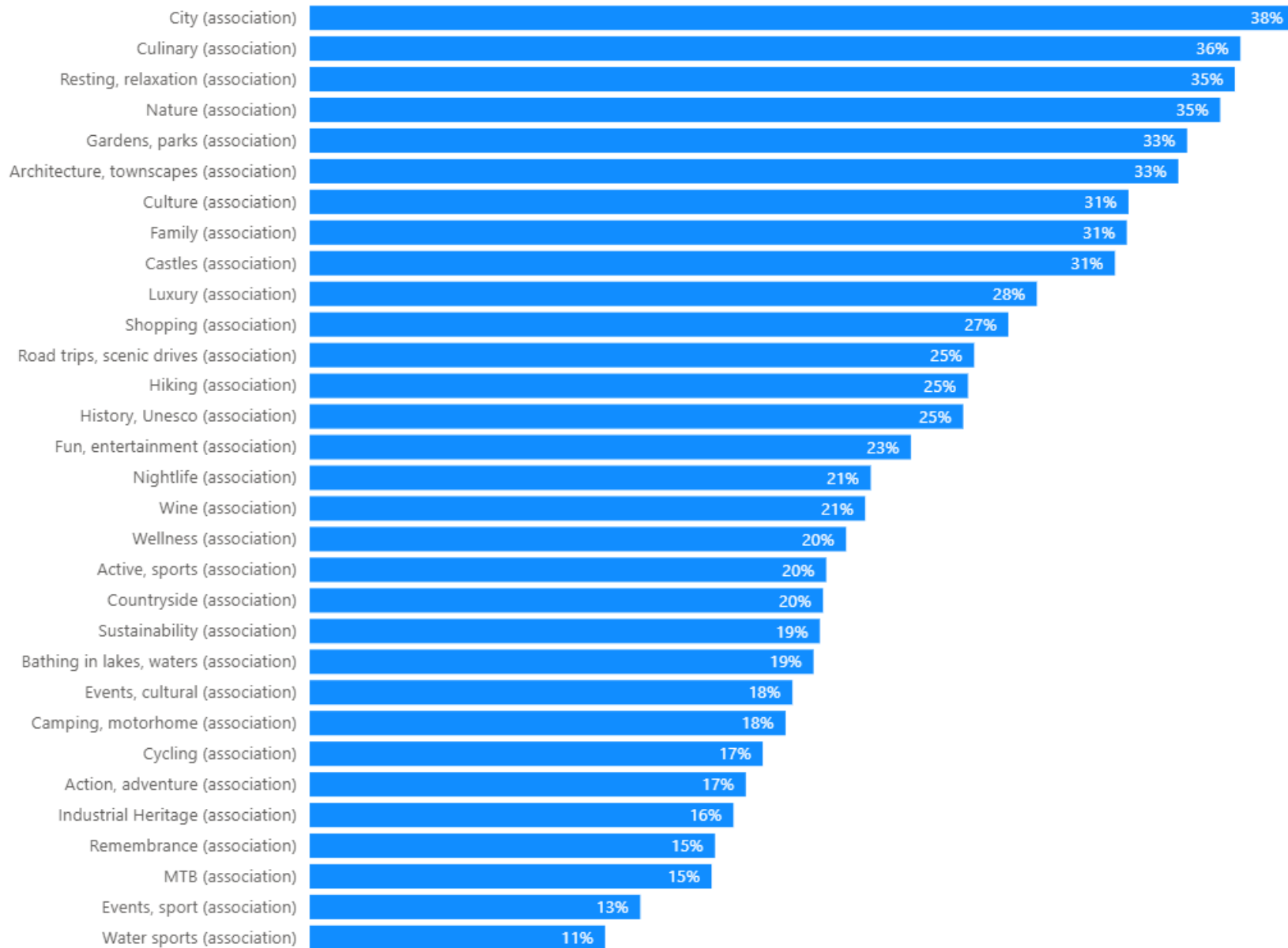
Items	Action...	Active...	Archit...	Bathin...	Campi...	Castle...	City (...)	Count...	Culina...	Cultur...	Cyclin...	Events...	Excha...	Family...	Film lo...	Fun, e...	Garde...	Hiking...	Histor...	Immer...	Indust...	Learni...	Luxury...	Motor...	MTB (...)	Natur...	Nightli...	Reme...	Restin...	Road t...	Shopp...	Sights...	Sustai...	Train t...	Water ...	Wellne...	🔍 ↻ 🌐
Action, adventure (interest)	100%	51%	31%	35%	44%	32%	32%	39%	30%	32%	44%	46%	36%	33%	47%	41%	31%	35%	29%	33%	41%	43%	44%	48%	51%	30%	45%	41%	29%	32%	41%	32%	40%	37%	44%	42%	37%
Active, sports (interest)	46%	100%	27%	33%	39%	28%	27%	37%	25%	28%	54%	40%	33%	28%	40%	33%	33%	38%	27%	29%	39%	37%	36%	48%	55%	28%	36%	37%	25%	31%	33%	27%	36%	36%	39%	38%	33%
Architecture, townscapes (interest)	52%	50%	100%	58%	49%	61%	59%	52%	49%	64%	49%	57%	55%	47%	58%	49%	59%	51%	64%	57%	62%	57%	52%	48%	49%	50%	55%	62%	44%	53%	51%	57%	56%	57%	49%	50%	53%
Bathing in lakes, waters (interest)	55%	53%	41%	100%	52%	41%	39%	51%	41%	39%	50%	52%	47%	44%	52%	49%	47%	47%	39%	43%	52%	48%	53%	53%	54%	44%	51%	51%	45%	49%	46%	41%	49%	48%	56%	53%	48%
Camping, motorhome (interest)	34%	35%	24%	26%	100%	28%	24%	37%	21%	25%	41%	34%	29%	25%	35%	26%	20%	33%	26%	25%	37%	30%	29%	43%	44%	26%	30%	33%	22%	25%	28%	23%	31%	34%	31%	32%	30%
Castles (interest)	46%	44%	53%	57%	48%	100%	47%	51%	39%	57%	48%	48%	47%	40%	55%	40%	54%	49%	59%	47%	58%	49%	43%	48%	50%	44%	44%	61%	36%	50%	43%	48%	48%	52%	46%	45%	49%
City (interest)	51%	48%	58%	57%	46%	54%	100%	48%	47%	56%	49%	57%	52%	45%	57%	51%	55%	47%	54%	54%	58%	54%	53%	49%	49%	43%	59%	56%	42%	50%	58%	56%	52%	56%	46%	50%	51%
Countryside (interest)	34%	38%	28%	35%	42%	34%	28%	100%	27%	31%	43%	35%	34%	29%	38%	29%	36%	39%	31%	31%	40%	33%	33%	43%	45%	33%	33%	35%	27%	32%	32%	26%	39%	38%	36%	37%	39%
Culinary (interest)	64%	63%	63%	66%	59%	62%	66%	65%	100%	63%	60%	68%	64%	62%	61%	66%	59%	60%	63%	66%	64%	62%	68%	60%	60%	63%	68%	61%	64%	58%	68%	62%	65%	62%	60%	67%	72%
Culture (interest)	45%	44%	56%	57%	44%	59%	52%	48%	41%	100%	49%	53%	49%	39%	51%	41%	53%	47%	62%	49%	58%	52%	44%	47%	48%	44%	48%	56%	37%	47%	45%	50%	51%	52%	45%	45%	49%
Cycling (interest)	31%	38%	22%	15%	32%	23%	20%	30%	17%	23%	100%	27%	26%	20%	30%	22%	18%	31%	22%	22%	32%	27%	25%	39%	52%	22%	25%	30%	17%	18%	24%	20%	27%	29%	25%	26%	26%
Events (interest)	44%	43%	33%	36%	40%	33%	34%	36%	29%	35%	42%	100%	38%	31%	48%	38%	38%	33%	32%	33%	46%	41%	42%	44%	45%	28%	46%	41%	27%	32%	40%	31%	39%	41%	39%	40%	40%
Exchanging with locals (interest)	39%	40%	36%	36%	39%	36%	35%	42%	32%	37%	40%	43%	100%	31%	43%	34%	32%	36%	37%	47%	44%	44%	37%	42%	42%	33%	42%	42%	30%	37%	36%	34%	43%	40%	43%	38%	41%
Family (interest)	58%	57%	50%	57%	57%	52%	52%	56%	51%	50%	56%	58%	50%	100%	57%	56%	52%	51%	50%	50%	56%	55%	58%	53%	56%	51%	54%	52%	53%	53%	58%	50%	56%	53%	52%	56%	53%
Film locations (interest)	35%	33%	26%	29%	33%	28%	26%	32%	21%	26%	32%	37%	29%	24%	100%	28%	30%	24%	25%	25%	39%	32%	35%	39%	37%	21%	34%	38%	21%	27%	33%	24%	34%	32%	31%	33%	29%
Fun, entertainment (interest)	63%	56%	45%	48%	51%	42%	48%	50%	47%	44%	49%	62%	48%	49%	59%	100%	47%	43%	41%	47%	52%	53%	57%	55%	52%	42%	62%	49%	47%	44%	61%	47%	53%	48%	56%	57%	48%
Gardens, parks (interest)	56%	56%	49%	52%	52%	50%	47%	61%	45%	48%	52%	56%	54%	46%	57%	53%	100%	56%	46%	50%	53%	53%	51%	54%	53%	53%	50%	55%	46%	53%	52%	48%	56%	55%	51%	55%	52%
Hiking (interest)	43%	47%	38%	44%	46%	39%	34%	46%	31%	36%	53%	38%	40%	32%	41%	34%	42%	100%	38%	38%	43%	41%	33%	43%	51%	43%	34%	43%	30%	40%	33%	38%	40%	43%	40%	38%	37%
History, Unesco (interest)	44%	45%	58%	59%	46%	62%	51%	49%	42%	64%	48%	50%	50%	41%	50%	40%	56%	50%	100%	51%	61%	51%	43%	46%	47%	46%	47%	59%	38%	53%	42%	51%	50%	52%	47%	45%	49%
Immersive travel (interest)	50%	48%	52%	53%	48%	49%	50%	52%	46%	51%	46%	53%	65%	43%	52%	46%	49%	47%	52%	100%	54%	57%	45%	47%	47%	46%	54%	53%	41%	51%	45%	51%	52%	51%	49%	46%	51%
Industrial Heritage (interest)	29%	31%	26%	24%	32%	30%	26%	31%	20%	29%	36%	35%	28%	22%	37%	24%	24%	28%	30%	25%	100%	30%	30%	38%	39%	22%	31%	41%	19%	25%	27%	23%	31%	33%	28%	30%	30%
Learning, new skills (interest)	50%	48%	41%	50%	44%	39%	39%	44%	35%	42%	44%	50%	47%	37%	50%	41%	47%	39%	40%	45%	50%	100%	43%	47%	47%	36%	47%	47%	33%	48%	41%	39%	48%	44%	47%	43%	43%
Luxury (interest)	37%	38%	27%	27%	33%	28%	32%	33%	29%	29%	36%	41%	29%	30%	41%	31%	28%	28%	28%	25%	39%	31%	100%	41%	40%	25%	41%	34%	29%	22%	44%	25%	37%	33%	26%	44%	36%
Motorcycling (interest)	27%	28%	16%	17%	29%	19%	17%	25%	15%	18%	34%	25%	22%	16%	29%	20%	19%	21%	18%	17%	29%	23%	24%	100%	40%	16%	25%	26%	14%	15%	22%	16%	24%	24%	24%	25%	23%
MTB (interest)	29%	34%	17%	18%	30%	20%	17%	27%	15%	19%	45%	26%	22%	17%	29%	19%	20%	25%	18%	18%	30%	23%	24%	41%	100%	17%	23%	27%	15%	19%	22%	17%	24%	26%	25%	23%	
Nature (interest)	62%	63%	62%	66%	64%	62%	54%	70%	56%	60%	66%	58%	62%	55%	58%	55%	58%	76%	62%	63%	60%	63%	52%	57%	63%	100%	53%	60%	56%	59%	51%	60%	63%	61%	60%	58%	59%
Nightlife (interest)	44%	40%	32%	41%	38%	32%	38%	35%	30%	33%	39%	49%	37%	30%	45%	39%	34%	31%	31%	34%	43%	39%	44%	45%	42%	27%	100%	39%	29%	36%	45%	31%	39%	39%	37%	40%	38%
Remembrance (interest)	32%	32%	29%	27%	33%	33%	27%	31%	22%	30%	33%	34%	30%	23%	40%	25%	29%	27%	31%	27%	46%	31%	31%	37%	37%	23%	31%	100%	21%	28%	28%	26%	31%	32%	31%	30%	31%
Resting, relaxation (interest)	60%	59%	55%	63%	59%	55%	57%	62%	61%	54%	58%	60%	57%	62%	59%	64%	51%	56%	54%	57%	58%	58%	66%	57%	57%	60%	62%	56%	100%	53%	65%	55%	62%	57%	57%	67%	59%
Road trips, scenic drives (interest)	46%	46%	37%	42%	49%	37%	37%	44%	35%	34%	45%	45%	43%	38%	48%	42%	41%	41%	35%	41%	52%	44%	44%	47%	48%	36%	44%	48%	35%	100%	43%	38%	41%	46%	44%	45%	45%
Shopping (interest)	39%	36%	30%	29%	35%	30%	37%	34%	30%	31%	37%	42%	32%	32%	43%	38%	32%	29%	28%	29%	38%	34%	47%	40%	40%	26%	44%	35%	30%	27%	100%	28%	38%	36%	33%	45%	35%
Sightseeing (interest)	61%	57%	65%	62%	54%	63%	65%	56%	54%	65%	53%	62%	59%	53%	60%	57%	57%	57%	64%	63%	63%	63%	55%	53%	55%	55%	61%	62%	49%	60%	56%	100%	58%	58%	55%	53%	57%
Sustainability (interest)	38%	42%	33%	38%	41%	37%	35%	44%	31%	37%	43%	44%	38%	33%	44%	33%	40%	38%	36%	34%	45%	40%	42%	45%	45%	34%	41%	38%	31%	32%	41%	30%	100%	43%	38%	45%	39%
Trad./folk festivals/mkts (interest)	53%	50%	47%	50%	47%	47%	46%	50%	44%	46%	45%	59%	52%	47%	59%	49%	49%	46%	45%	50%	52%	52%	49%	45%	46%	44%	56%	54%	43%	52%	51%	46%	49%	51%	47%	46%	52%
Train travel (interest)	33%	37%	31%	34%	38%	34%	32%	37%	25%	33%	42%	39%	33%	26%	38%	28%	32%	35%	32%	30%	42%	34%	33%	40%	43%	28%	36%	36%	25%	31%	34%	27%	37%	100%	30%	34%	34%
Water sports (interest)	35%	34%	17%	25%	30%	17%	17%	25%	18%	17%	37%	26%	25%	18%	27%	27%	20%	24%	15%	19%	28%	21%	28%	39%	38%	19%	23%	26%	19%	23%	26%	18%	24%	23%	100%	29%	24%
Wellness (interest)	39%	42%	28%	35%	38%	32%	32%	39%	30%	31%	40%	41%	32%	31%	42%	34%	29%	34%	30%	28%	41%	33%	46%	44%	45%	29%	39%	36%	31%	28%	44%	26%	41%	37%	36%	100%	37%
Wine (interest)	35%	37%	31%	34%	37%	35%	33%	43%	33%	35%	42%	42%	37%	29%	38%	30%	38%	34%	34%	33%	42%	36%	38%	42%	42%	30%	39%	39%	28%	34%	36%	29%	37%	38%	35%	38%	100%



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

Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report.

Luxembourg's Theme Suitability

— Average 14 European source markets



	Past visits (ovn)	Travel intent Lux: high/very high
City (association)	44%	48%
Culinary (association)	42%	47%
Nature (association)	44%	46%
Resting, relaxation (association)	42%	46%
Architecture, townscapes (association)	40%	46%
Family (association)	40%	42%
Gardens, parks (association)	38%	42%
Castles (association)	39%	41%
Culture (association)	38%	42%
Luxury (association)	34%	36%
Shopping (association)	34%	35%
History, Unesco (association)	32%	35%
Hiking (association)	33%	33%
Road trips, scenic drives (association)	32%	33%
Fun, entertainment (association)	31%	34%
Wine (association)	30%	30%
Nightlife (association)	28%	30%
Active, sports (association)	28%	28%
Wellness (association)	28%	28%
Countryside (association)	27%	28%
Events, cultural (association)	27%	27%
Sustainability (association)	26%	28%
Camping, motorhome (association)	26%	25%
Bathing in lakes, waters (association)	25%	24%
Action, adventure (association)	24%	25%
Cycling (association)	25%	23%
Industrial Heritage (association)	24%	24%
Remembrance (association)	23%	23%
MTB (association)	23%	21%
Events, sport (association)	20%	17%
Water sports (association)	19%	15%

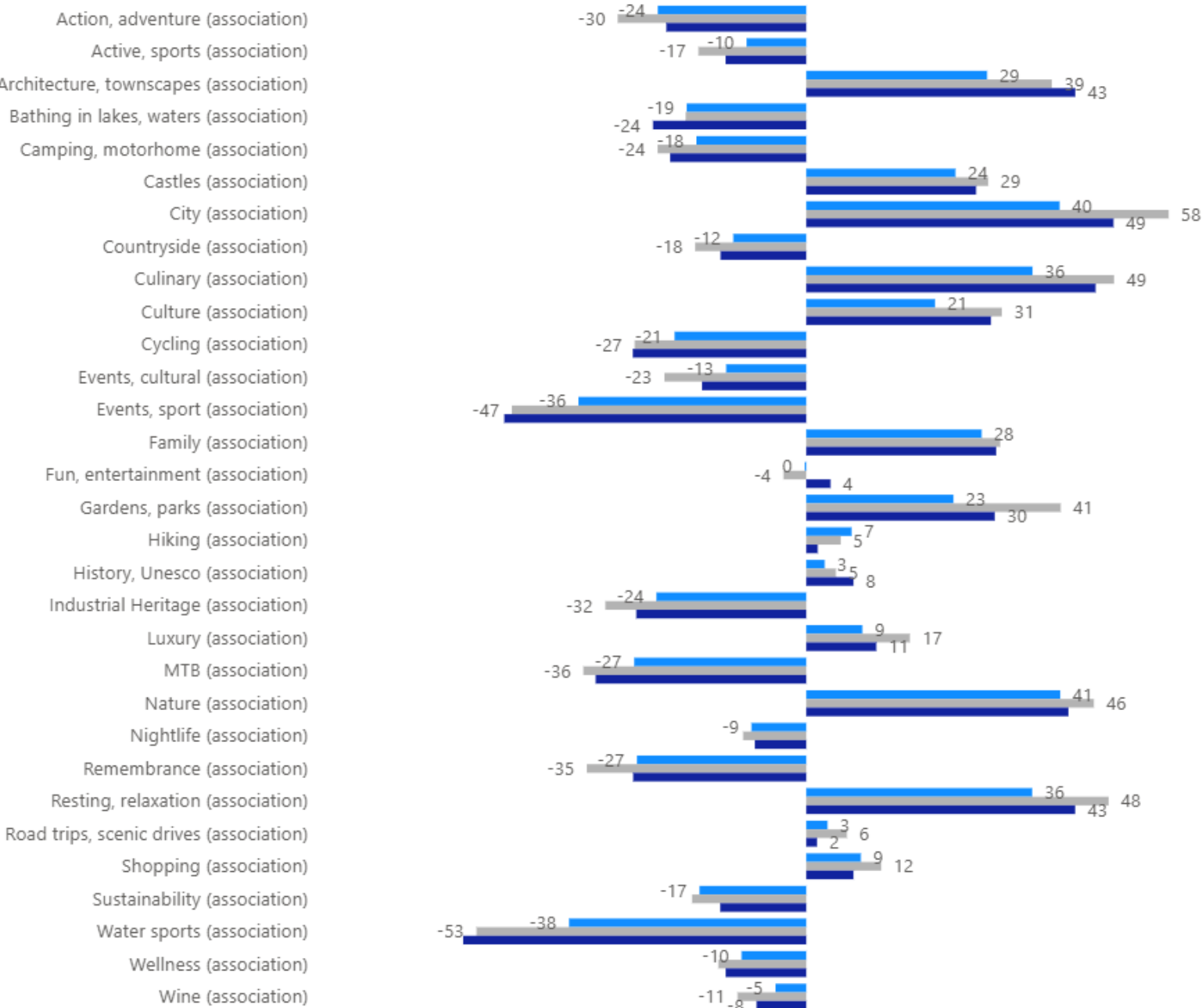
Indicates the share of respondents that consider Luxembourg suitable for the listed holiday themes & experiences, i.e.. to what degree those themes are associated with destination Luxembourg in respondents' perceptions.

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

Luxembourg's Theme Suitability



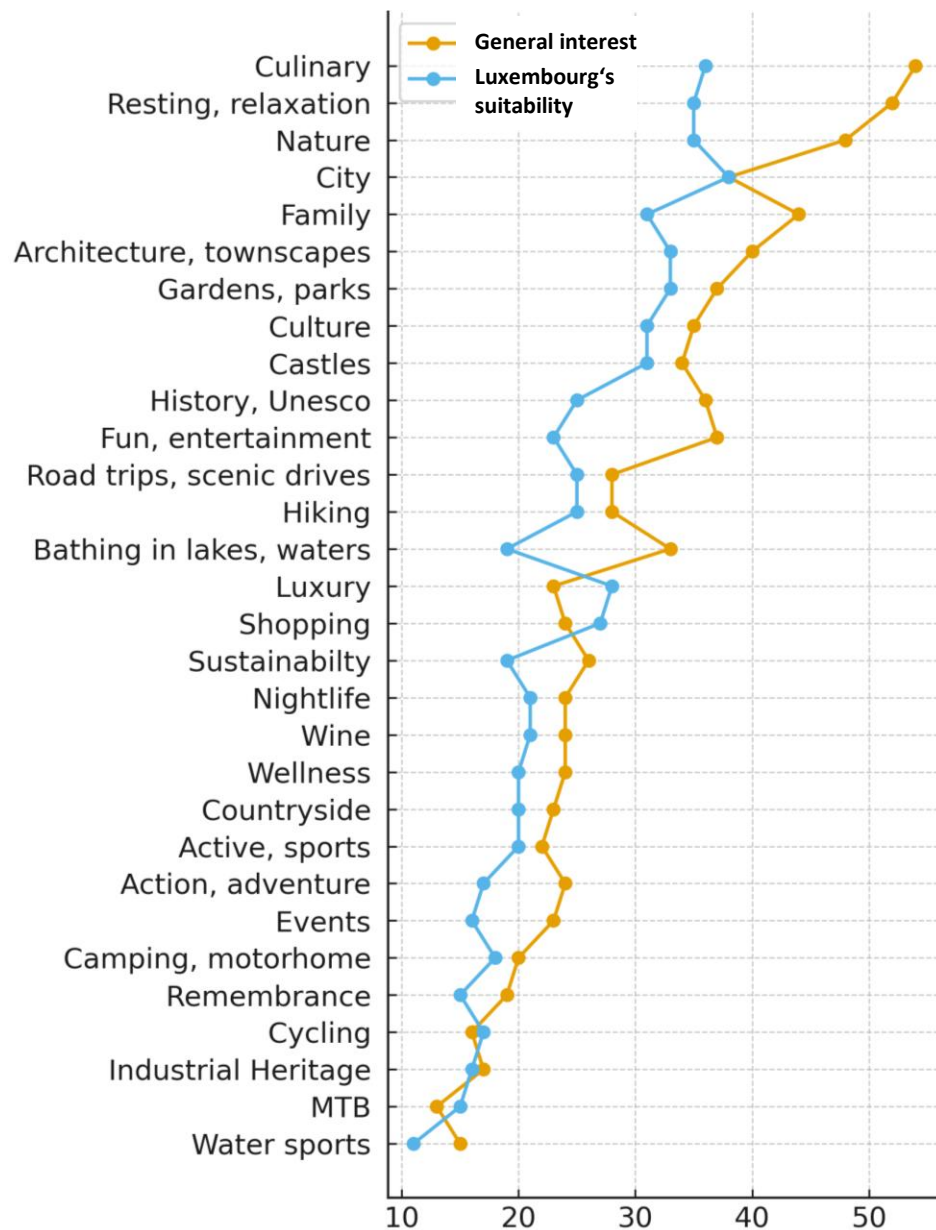
- Past visits (ovn)
- Total
- Travel intent Lux: high/very high



This chart shows, for each theme, the deviation from the average value across all themes for, respectively, past visitors, all respondents and respondents with high or very high travel intent to Luxembourg next years. This allows for a better comparison between themes by sub-segments.

Luxembourg's Theme Competence (*)

Average 13 European source markets (**)



Growth potential for themes (***)

- Culinary
- Resting/relaxation
- Nature
- Family
- History & Unesco
- Sustainability
- Action, adventure
- Events

Best-ranked themes in each source market

- City : DK-FR-DE-IE-PL-CH-ES
- Nature : BE-NL
- Culinary : AT-SE
- Castles : IT
- Family : PT
- Architecture/townscapes : UK

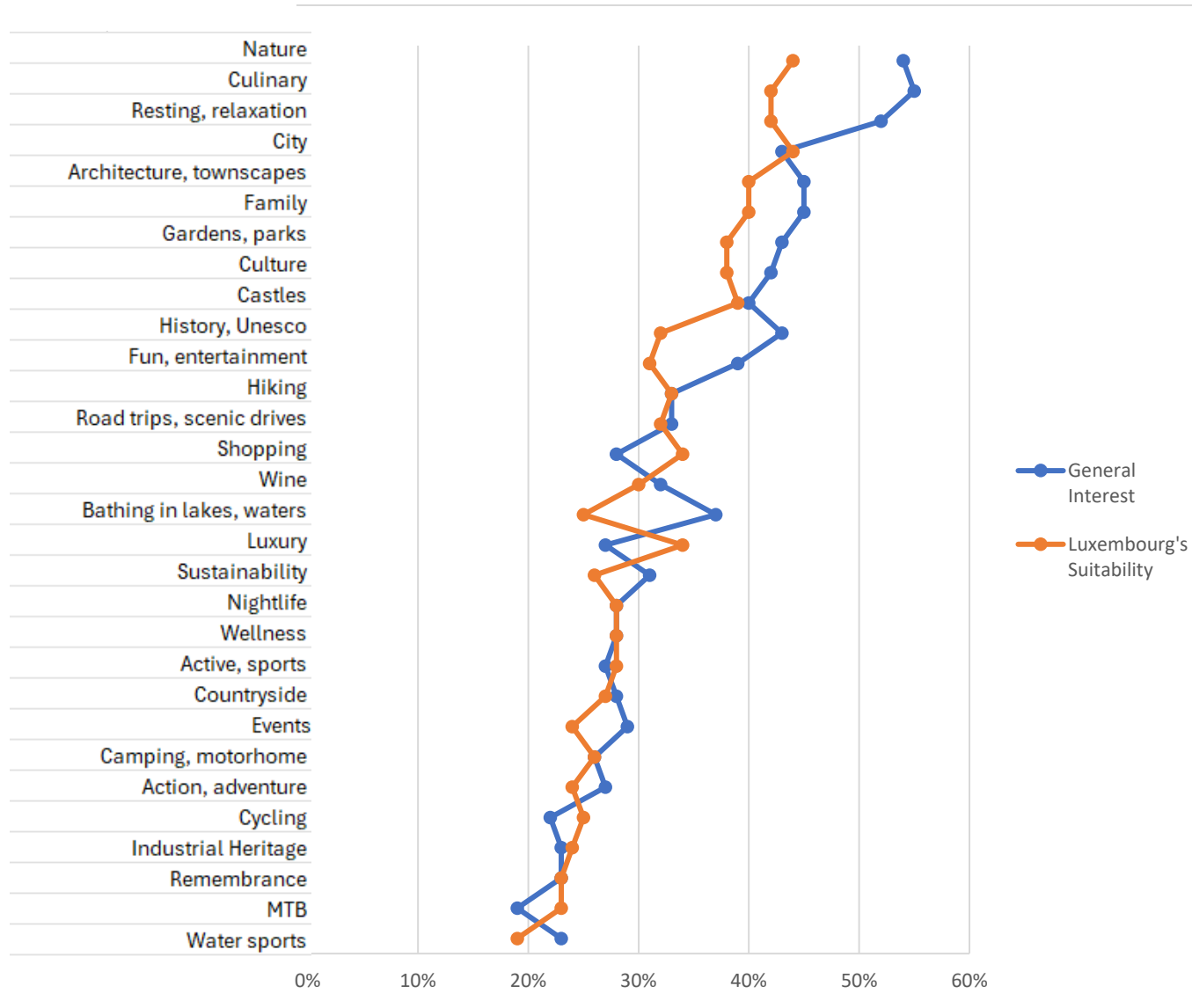
(*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

(**) DE-BE-NL-FR-UK-CH-AT-IT-ES-IE-DK-SE-PT.

(***) Themes for which Luxembourg's theme suitability is still relatively low, compared to the overall general theme interest – see chart.

Luxembourg's Theme Competence (*)

Average 13 European source markets (**) – PAST VISITORS ONLY



Growth potential for themes (***)

- Culinary
- Resting/relaxation
- Nature
- Family
- History & Unesco
- Fun/entertainment
- Sustainability
- Events

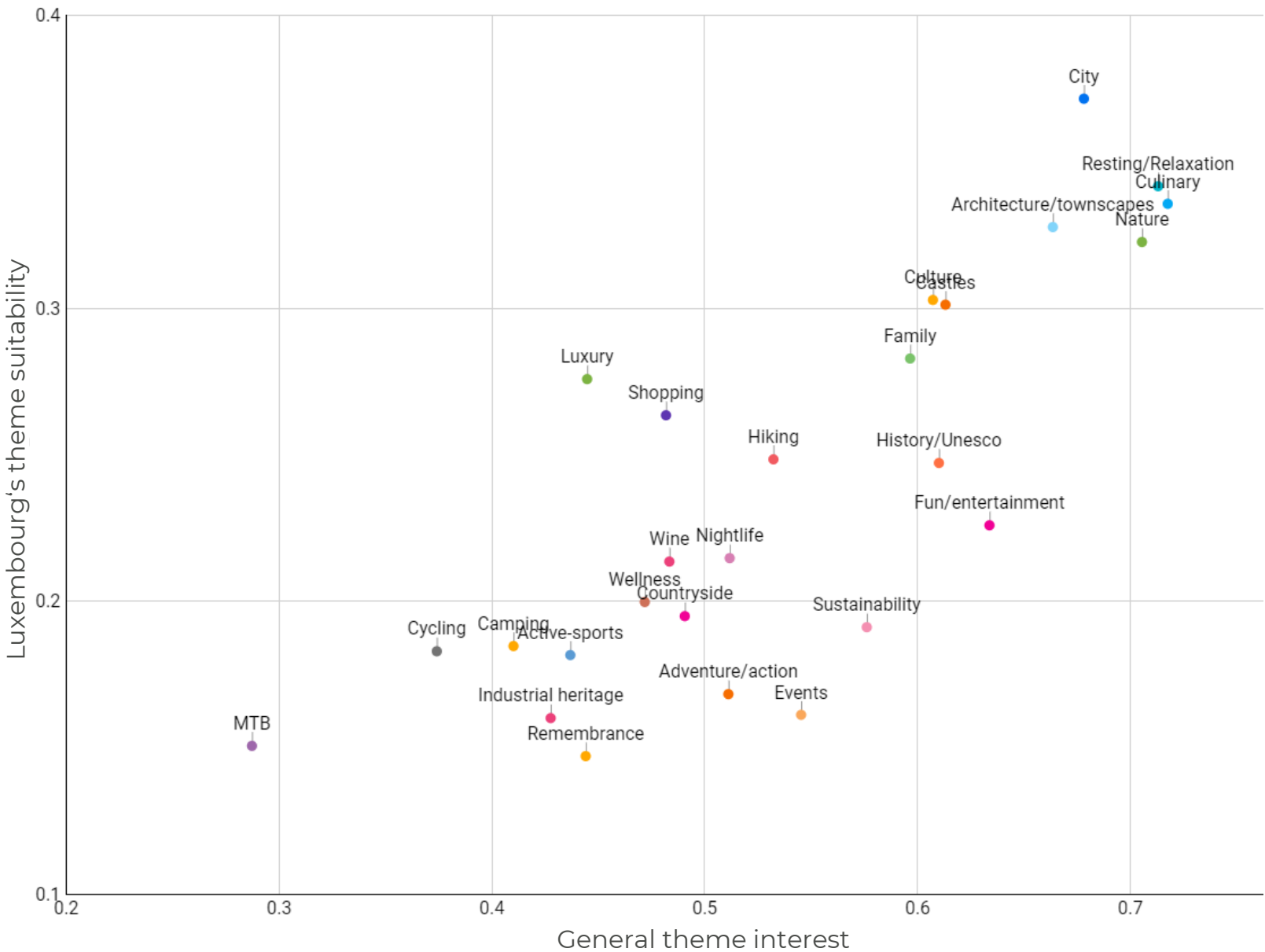
(*) Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

(**) DE-BE-NL-FR-UK-CH-AT-IT-ES-IE-DK-SE-PT.

(***) Relevant themes for which Luxembourg's theme suitability is still relatively low, compared to the overall general theme interest – see chart.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability

 — Average 13 European source markets



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

Luxembourg's Theme Suitability – Source Markets



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
City (association)	41%	31%	38%	35%	42%	47%	37%	29%	39%	42%	31%	40%	38%
Culinary (association)	41%	34%	34%	27%	41%	43%	29%	30%	44%	34%	36%	33%	34%
Resting, relaxation (association)	29%	39%	34%	32%	31%	37%	32%	44%	49%	37%	28%	36%	31%
Nature (association)	31%	57%	28%	27%	32%	29%	34%	54%	43%	36%	20%	30%	31%
Culture (association)	33%	25%	28%	27%	29%	34%	36%	23%	48%	39%	26%	29%	30%
Family (association)	23%	37%	29%	34%	28%	28%	29%	36%	50%	36%	25%	28%	24%
Castles (association)	31%	36%	25%	24%	29%	28%	41%	35%	37%	37%	23%	29%	26%
Shopping (association)	24%	25%	32%	29%	29%	34%	22%	21%	27%	26%	28%	27%	23%
Hiking (association)	19%	51%	16%	18%	21%	16%	28%	52%	29%	20%	16%	17%	23%
History, Unesco (association)	22%	23%	17%	23%	24%	28%	27%	21%	42%	32%	22%	21%	23%
Architecture, townscapes (association)	36%	30%		31%	33%		32%	31%		36%		30%	39%
Nightlife (association)	22%	12%	17%	25%	19%	26%	21%	15%	30%	28%	23%	21%	19%
Wine (association)	20%	24%	22%	17%	23%	25%	20%	19%	25%	21%	21%	19%	20%
Wellness (association)	18%	17%	26%	17%	17%	25%	20%	15%	42%	19%	16%	18%	16%
Active, sports (association)	19%	24%	27%	17%	19%	21%	16%	26%	21%	20%	15%	18%	14%
Sustainability (association)	17%	19%	20%	16%	18%	22%	21%	16%	33%	22%	17%	16%	15%
Luxury (association)	31%	22%		33%	28%		27%	22%		30%		29%	27%
Camping, motorhome (association)	14%	25%	19%	13%	17%	17%	15%	32%	21%	17%	15%	16%	16%
Countryside (association)	15%	24%		15%	17%	21%	20%	22%	27%	20%	18%	16%	20%
Cycling (association)	18%	26%	22%	18%	20%	18%	12%	27%	13%	13%	11%	15%	13%
Industrial Heritage (association)	14%	14%	21%	16%	14%	18%	16%	11%	23%	18%	13%	17%	17%
Fun, entertainment (association)	22%	20%		26%	22%		22%	22%		26%		24%	22%
MTB (association)	10%	24%	20%	13%	13%	14%	13%	27%	15%	16%	11%	13%	11%
Events, cultural (association)	18%	12%	20%	20%	17%		25%	10%		27%		20%	16%
Action, adventure (association)	15%	21%		15%	14%		15%	22%		17%		15%	15%
Remembrance (association)	15%	14%		15%	15%		16%	13%		20%		18%	14%
Gardens, parks (association)							34%			33%			
Road trips, scenic drives (association)							26%			25%			
Bathing in lakes, waters (association)							14%			25%			
Events, sport (association)							12%			13%			
Water sports (association)							9%			13%			

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

Luxembourg's Theme Suitability – Ranking by Source Markets

Average
Europe |



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

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

Luxembourg's Theme Suitability – Target segments



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
City (association)	43%	33%	36%	42%	35%	38%
Nature (association)	38%	31%	46%	38%	31%	37%
Resting, relaxation (association)	33%	32%	37%	41%	38%	35%
Culinary (association)	38%	31%	35%	41%	35%	36%
Architecture, townscapes (association)	38%	29%	31%	42%	30%	33%
Gardens, parks (association)	36%	31%	32%	35%	32%	30%
Family (association)	31%	31%	32%	38%	30%	32%
Castles (association)	35%	27%	36%	35%	27%	31%
Culture (association)	37%	27%	32%	34%	28%	32%
Luxury (association)	29%	25%	27%	35%	27%	27%
Shopping (association)	26%	24%	25%	36%	28%	26%
Hiking (association)	27%	22%	36%	27%	22%	28%
History, Unesco (association)	29%	22%	27%	31%	22%	24%
Road trips, scenic drives (association)	27%	24%	24%	27%	23%	23%
Fun, entertainment (association)	24%	20%	24%	35%	22%	22%
Nightlife (association)	24%	18%	27%	30%	19%	20%
Wine (association)	22%	18%	26%	27%	20%	21%
Active, sports (association)	20%	18%	27%	29%	17%	20%
Wellness (association)	20%	18%	26%	26%	21%	20%
Sustainability (association)	21%	17%	24%	28%	17%	19%
Countryside (association)	21%	18%	27%	26%	18%	18%
Events, cultural (association)	21%	16%	21%	26%	16%	19%
Camping, motorhome (association)	19%	17%	24%	23%	16%	19%
Bathing in lakes, waters (association)	19%	18%	20%	27%	19%	13%
Cycling (association)	18%	15%	27%	22%	15%	17%
Action, adventure (association)	18%	15%	21%	27%	15%	16%
Industrial Heritage (association)	17%	15%	24%	24%	13%	16%
MTB (association)	15%	15%	24%	22%	13%	18%
Remembrance (association)	17%	14%	18%	23%	13%	16%
Events, sport (association)	11%	11%	16%	23%	12%	10%
Water sports (association)	10%	9%	19%	23%	9%	8%

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Average **14 European source markets** – LFT target segments



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 PL: Destination Brand/Inspektour.

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

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.).

* 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 PL: Destination Brand/Inspektour.



4

Brand Features

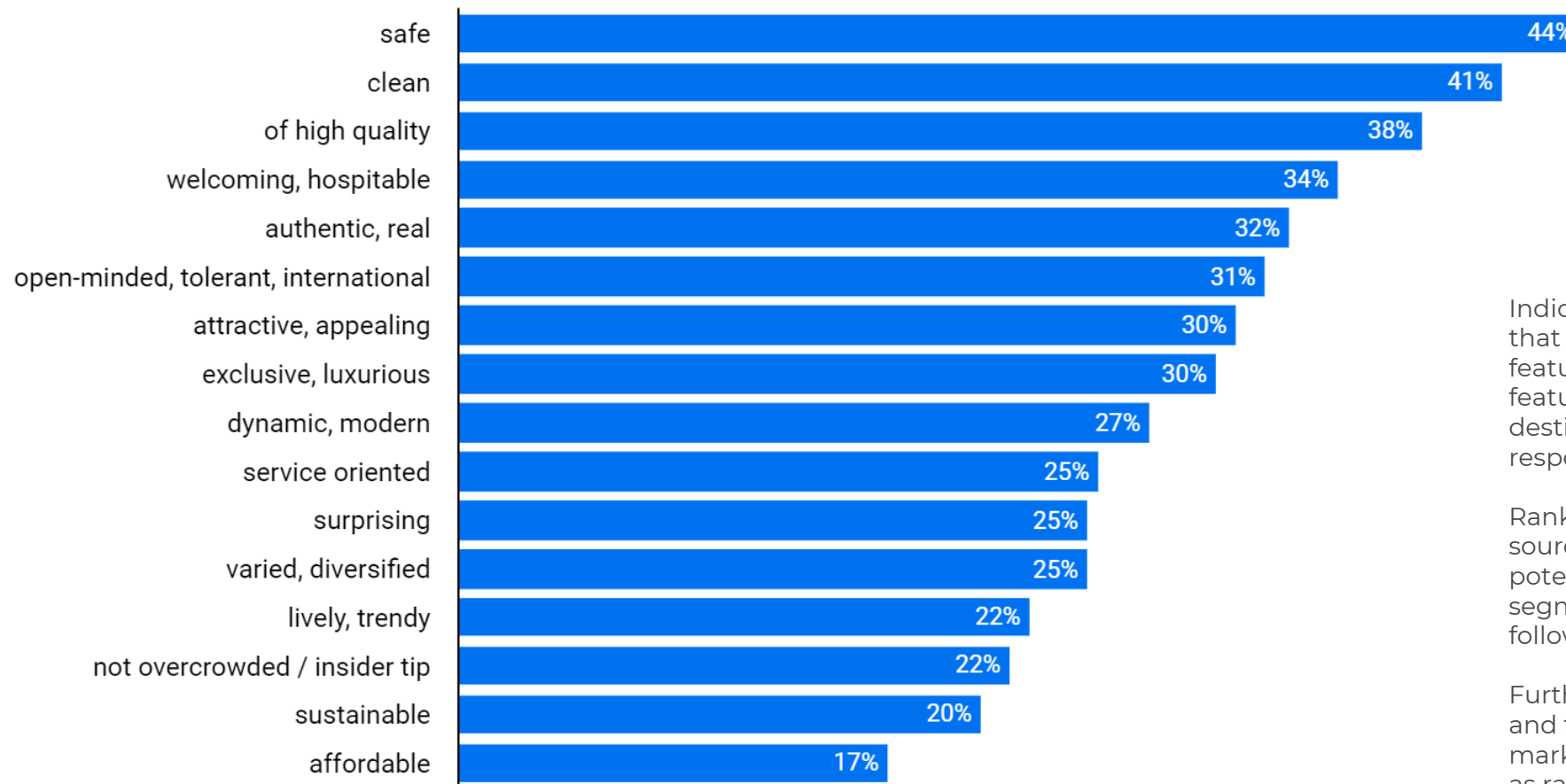
Brand features : Key insights



- **Luxembourg is perceived as a trustworthy, well-maintained and high-quality travel destination.** "Safe" (44%) and "clean" (41%) lead the brand attribute ranking, followed by "high quality" (38%) and "welcoming/hospitable" (34%).
- **Weaknesses in emotional and differentiating attributes.** The attributes "surprising" (25%), "varied/diversified" (25%), "lively/trendy" (22%) and "not overcrowded/insider tip" (22%) score significantly lower. "Affordable" brings up the rear at 17%. Luxembourg is perceived as solid but not particularly surprising — an inspiration deficit.
- **Past visitors rate emotional attributes higher.** Visitors rate "welcoming", "varied" and "service oriented" notably higher than non-visitors. The visiting experience partially closes the perception gap on softer attributes.
- **Price perception is a structural challenge.** "Affordable" ranks last across all segments and markets. This corresponds with the high prominence of "too expensive" as a reason for not choosing Luxembourg. Value-for-money communication is therefore essential.

Luxembourg's Brand Features Ratings

— Average 13 European source markets



Indicates the share of respondents that agree on the listed brand features, i.e.. to what degree those features are associated with destination Luxembourg in respondents' perceptions.

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

Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report

Luxembourg's Brand Features Ratings

 — Average **13 European source markets**



	Total	Past visits (ovn)	Travel intent Lux: high/very high
Safe	44%	51%	53%
Clean	42%	52%	53%
Of high quality	38%	46%	50%
Welcoming	36%	47%	49%
Authentic	34%	41%	46%
Open-minded, tolerant	33%	42%	44%
Attractive	32%	41%	45%
Exclusive, luxurious	30%	36%	38%
Modern, dynamic	27%	35%	37%
Unique	28%	34%	37%
Varied	25%	34%	37%
Surprising	26%	32%	37%
Service oriented	25%	34%	35%
Lively, trendy	23%	30%	32%
Not overcrowded, insider tip	22%	29%	29%
Sustainable	21%	28%	30%
Affordable	17%	24%	25%

Indicates the share of respondents that agree on the listed brand features, i.e.. to what degree those features are associated with destination Luxembourg in respondents' perceptions.

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

Luxembourg's Brand Features Ratings

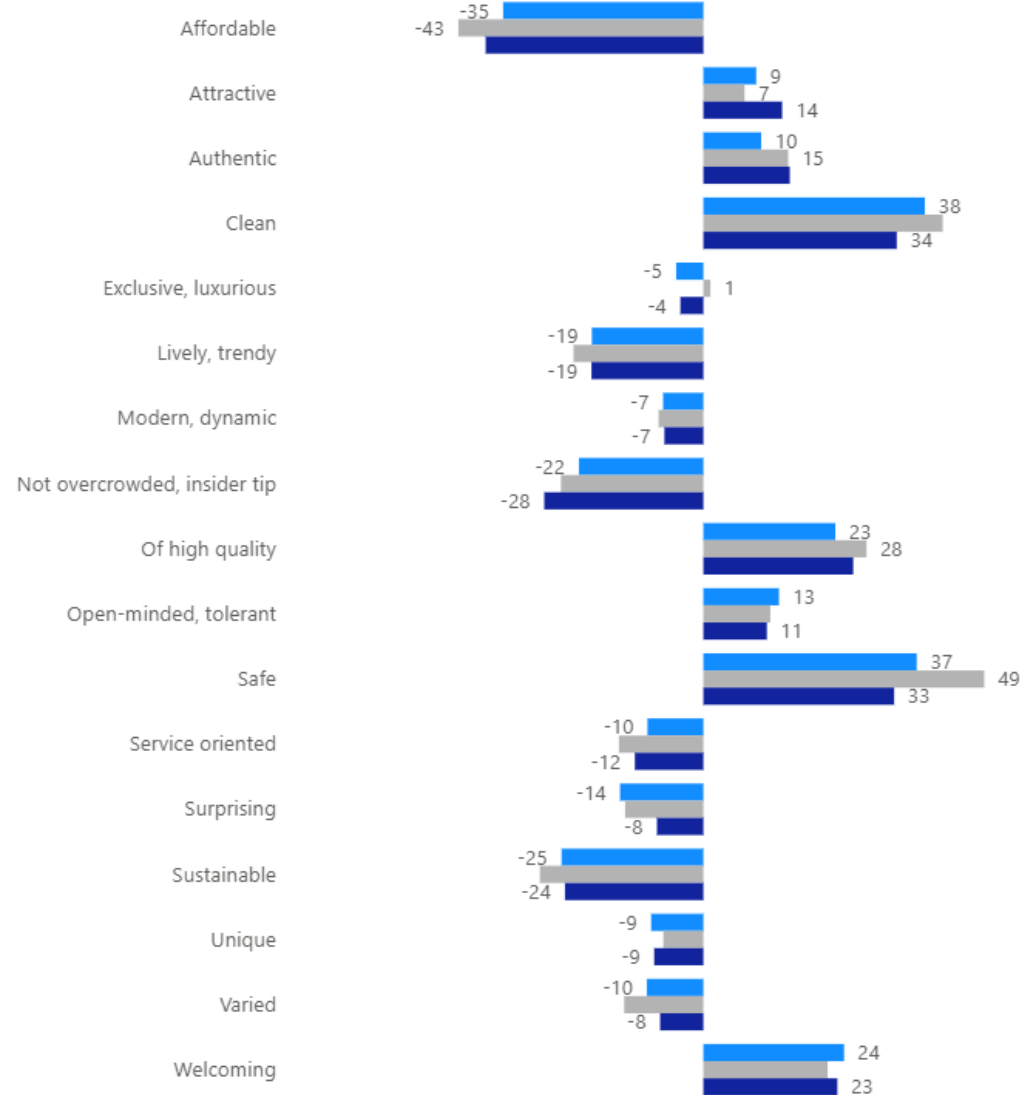
— Average 13 European source markets



● Past visits (ovn)

● Total

● Travel intent Lux: high/very high



This chart shows, for each brand feature, the deviation from the average value across all brand features for, respectively, past visitors, all respondents and respondents with high or very high travel intent to Luxembourg next years. This allows for a better comparison between brand features by sub-segments.

Luxembourg's Brand Features Ratings – Source Markets



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Safe	42%	42%	40%	37%	44%	41%	42%	49%	68%	47%	35%	43%	40%
Of high quality	39%	31%	40%	33%	36%	42%	37%	30%	60%	42%	34%	36%	34%
Welcoming	33%	35%	38%	30%	37%	39%	33%	36%	58%	31%	34%	30%	32%
Authentic	30%	34%	39%	29%	31%	37%	30%	31%	55%	34%	27%	30%	34%
Open-minded, tolerant	32%	24%	40%	31%	37%	36%	33%	26%	55%	34%	24%	30%	28%
Attractive	25%	28%	36%	25%	27%	40%	26%	29%	50%	38%	29%	25%	34%
Exclusive, luxurious	31%	21%	37%	29%	27%	37%	31%	19%	38%	32%	32%	28%	26%
Clean	37%	45%		44%	38%		46%	40%		45%		41%	41%
Modern, dynamic	25%	18%	32%	27%	27%	31%	28%	17%	51%	29%	24%	23%	20%
Surprising	18%	22%	32%	19%	20%	28%	25%	26%	45%	31%	24%	21%	21%
Varied	25%	22%	27%	23%	25%	31%	25%	21%	42%	27%	23%	21%	20%
Service oriented	22%	20%	32%	18%	25%	28%	27%	25%	45%	22%	26%	21%	17%
Lively, trendy	20%	15%	30%	21%	19%	32%	20%	17%	34%	26%	24%	20%	21%
Not overcrowded, insider tip	20%	20%	24%	17%	19%	26%	25%	18%	36%	25%	21%	18%	21%
Sustainable	16%	18%	20%	17%	16%	25%	27%	15%	41%	25%	20%	17%	17%
Affordable	10%	21%		17%	14%		19%	22%		16%		15%	17%
Unique							26%			29%			

Luxembourg's Brand Features Ratings – Ranking by Source Markets



Average Europe																
safe	1	1	2	3	2	1	2	2	1	1	1	1	1	2		
clean	2	3	1		1	2		1	2		2		2	1		
of high quality	3	2	5	1	3	5	1	3	5	2	3	3	3	4		
welcoming, hospitable	4	4	3	5	5	3	4	5	3	3	9	2	6	6		
authentic, real	5	7	4	4	6	6	6	7	4	5	6	6	5	3		
open-minded, tolerant, international	6	5	7	2	4	4	7	4	7	4	5	10	4	7		
attractive, appealing	7	8	6	7	9	9	3	11	6	7	4	5	8	5		
exclusive, luxurious	8	6	11	6	7	8	5	6	12	12	7	4	7	8		
dynamic, modern	9	10	14	8	8	7	9	8	15	6	10	8	9	13		
service oriented	10	11	12	9	13	10	11	10	9	9	16	7	10	16		
surprising	11	14	8	10	12	12	12	14	8	8	8	9	12	9		
varied, diversified	12	9	8	12	10	11	10	15	11	10	12	12	11	12		
lively, trendy	13	12	16	11	11	13	8	16	14	14	13	11	13	10		
not overcrowded / insider tip	14	13	13	13	15	14	13	13	13	13	15	13	14	11		
sustainable	15	15	15	14	16	15	14	9	16	11	14	14	15	14		
affordable	16	16	10		14	16		17	10		17		16	15		
unique								12			11					

Source: LFT
Brand &
Potential
Studies
2023-2024,
except data
for PL:
Destination
Brand/Inspe
ktour.

Luxembourg's Brand Features Ratings – Target segments



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Safe	50%	38%	43%	48%	42%	41%
Clean	46%	37%	41%	46%	40%	42%
Of high quality	41%	33%	37%	46%	37%	36%
Welcoming	39%	32%	36%	42%	35%	35%
Authentic	36%	31%	33%	38%	34%	33%
Open-minded, tolerant	37%	29%	33%	39%	31%	32%
Attractive	34%	29%	34%	39%	30%	31%
Exclusive, luxurious	31%	26%	30%	40%	29%	30%
Modern, dynamic	29%	24%	28%	35%	27%	26%
Unique	28%	27%	32%	32%	27%	23%
Surprising	27%	23%	29%	33%	24%	25%
Varied	27%	23%	29%	33%	24%	23%
Service oriented	27%	22%	27%	34%	24%	24%
Lively, trendy	24%	20%	26%	32%	22%	21%
Not overcrowded, insider tip	23%	20%	27%	28%	21%	24%
Sustainable	22%	19%	26%	32%	19%	22%
Affordable	17%	16%	18%	28%	16%	16%

Ranking Luxembourg's Brand Features Ratings



— Average **13 European source markets** — Past and future visitors – LFT target segments



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 could also be applied by source markets.

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



5

Travel inspiration

(regardless of specific destinations)

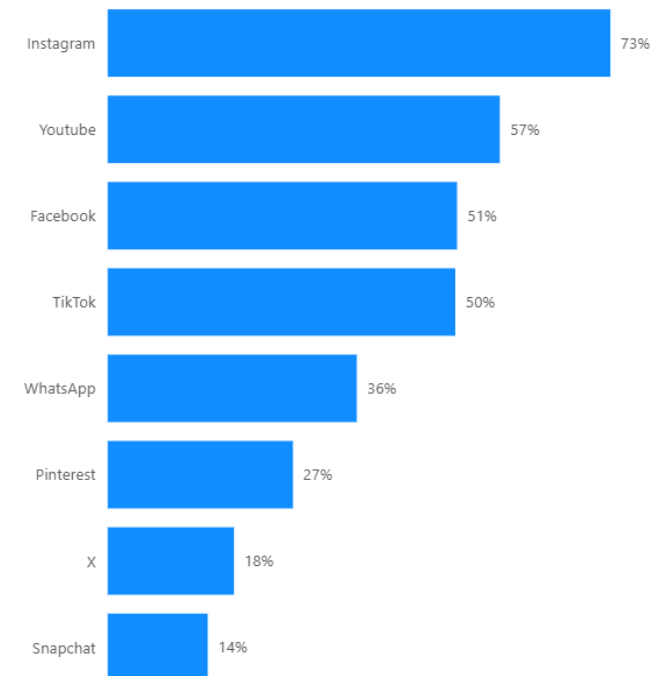
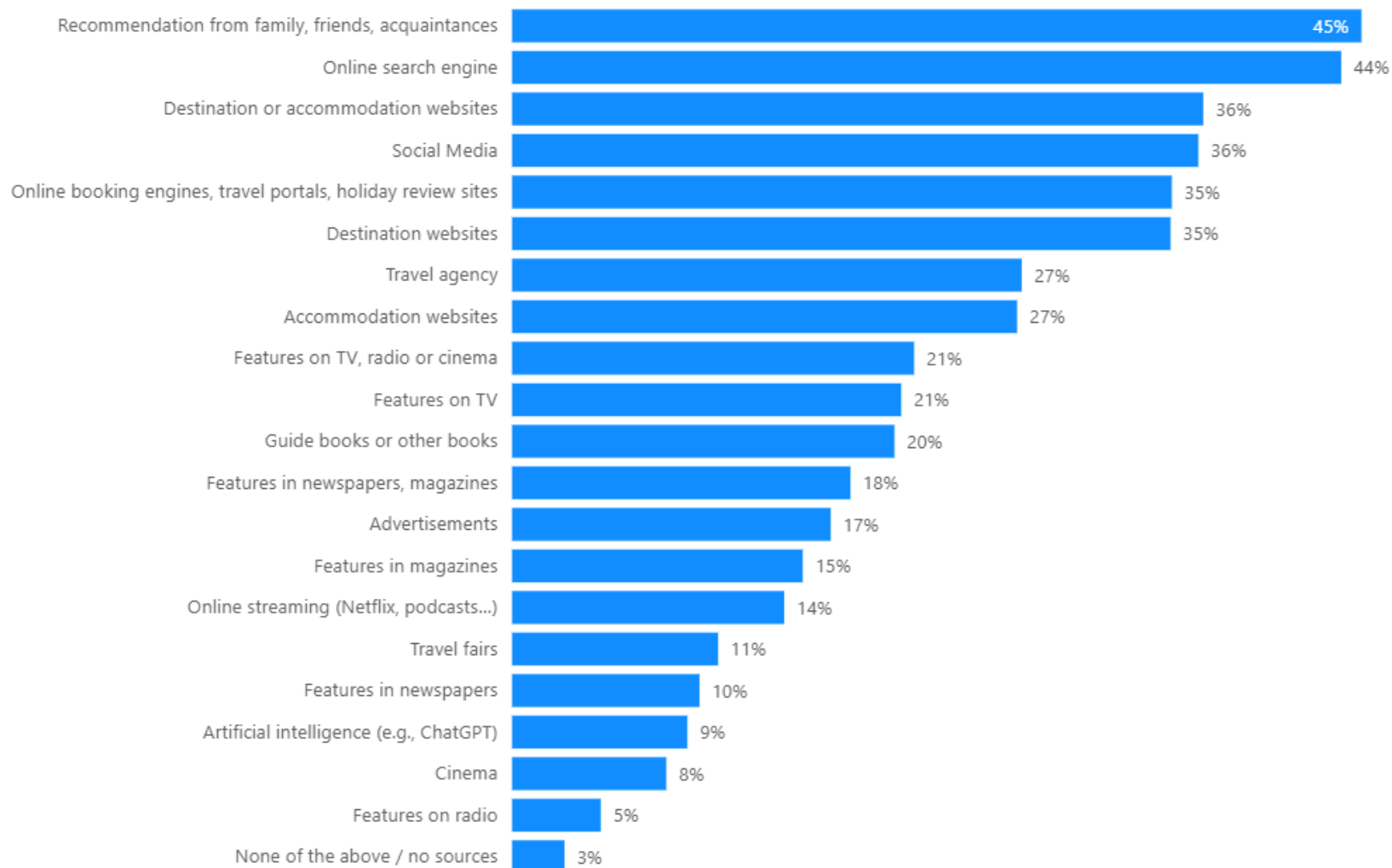
Travel inspiration : Key insights



- **Word of mouth and online search dominate the inspiration phase.** "Recommendations from family/friends" (45%) and "online search engines" (44%) are the most important inspiration sources, followed by destination/accommodation websites (36%), social media (36%) and review portals (35%).
- **Social media: Instagram and YouTube lead, TikTok has caught up.** Among social media channels, Instagram leads (73%), followed by YouTube (57%), Facebook (51%) and TikTok (50%). TikTok has now nearly reached Facebook's level — a clear indicator of the platform shift, particularly among younger target groups.
- **AI-based travel inspiration is still low but measurable.** Artificial intelligence (e.g. ChatGPT) is already used by 9% of respondents as an inspiration source and is prospected to rise quickly due to the rapid spread of the technology.
- **Destination websites remain highly relevant.** At 35%, they rank on a par with social media. For Luxembourg, this means: visitluxembourg.com remains a key channel for the inspiration phase, particularly for the well-informed EXP and PS segments.

Preferred sources of travel inspiration

🇪🇺 — Average 13 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, LFT target segments, theme interest groups and further demand indicators are presented on the following pages. Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report.

Preferred sources of travel inspiration

— Average **13 European source markets**



Past visits (ovn) Travel intent Lux: high/very high

Past visits (ovn) Travel intent Lux: high/very high

Recommendation from family, friends, acquaintances	44%	46%
Online search engine	41%	47%
Destination or accommodation websites	38%	41%
Online booking engines, travel portals, holiday review sites	36%	38%
Social Media	33%	39%
Destination websites	34%	38%
Travel agency	29%	30%
Accommodation websites	28%	29%
Guide books or other books	26%	24%
Features on TV, radio or cinema	25%	24%
Features on TV	23%	22%
Features in newspapers, magazines	23%	20%
Features in magazines	21%	17%
Advertisements	17%	19%
Online streaming (Netflix, podcasts...)	16%	16%
Travel fairs	15%	13%
Features in newspapers	13%	11%
Cinema	13%	9%
Artificial intelligence (e.g., ChatGPT)	11%	9%
Features on radio	9%	6%
None of the above / no sources	2%	1%

Instagram	75%	76%
Youtube	63%	62%
Facebook	59%	56%
TikTok	54%	53%
WhatsApp	44%	39%
Pinterest	27%	28%
X	28%	22%
Snapchat	17%	14%

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

Preferred sources of travel inspiration

— Average **13 European source markets**



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Recommendation from family, friends, acquaintances	45%	40%	42%	43%	50%	50%	34%	40%	54%	42%	52%	47%	43%
Online search engine	39%	43%	40%	39%	42%	53%	40%	44%	51%	35%	55%	36%	52%
Social Media	30%	31%	43%	30%	36%	41%	30%	32%	46%	37%	48%	30%	37%
Online booking engines, travel portals, holiday review sites	36%	31%	40%	29%	41%	43%	29%	34%	39%	21%	36%	34%	41%
Travel agency	23%	27%	30%	26%	24%	26%	26%	18%	40%	29%	27%	24%	27%
Guide books or other books	21%	25%	13%	28%	22%	17%	19%	19%	26%	22%	14%	22%	16%
Advertisements	17%	15%	20%	15%	15%	18%	14%	15%	23%	14%	19%	16%	17%
Travel fairs	9%	9%	13%	9%	11%	10%	8%	10%	22%	9%	10%	11%	9%
Online streaming (Netflix, podcasts...)	16%	12%		16%	16%		11%	12%		14%		18%	14%
Destination websites							32%			37%			
Artificial intelligence (e.g., ChatGPT)	8%			7%	8%		9%			14%		13%	5%
Accommodation websites							24%			29%			
Features on TV							20%			21%			
None of the above / no sources	3%	4%	2%	3%	3%	2%	3%	3%	2%	3%	2%	4%	2%
Features in magazines							17%			13%			
Features in newspapers							12%			8%			
Cinema							7%			9%			
Features on radio							5%			5%			

	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Instagram	72%	69%		72%	69%		81%	69%		79%		73%	71%
Youtube	55%	48%		54%	68%		60%	49%		63%		59%	54%
Facebook	54%	51%		47%	56%		55%	50%		39%		50%	54%
TikTok	47%	53%		56%	42%		45%	53%		55%		50%	53%
Pinterest	26%	30%		33%	37%		17%	30%		20%		24%	25%
Snapchat	12%	14%		29%	13%		4%	17%		4%		18%	18%
WhatsApp							38%			34%			
X							11%			26%			

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

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

Preferred sources of travel inspiration

— Average **13 European source markets**



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Recommendation from family, friends, acquaintances	48%	47%	36%	36%	46%	42%
Online search engine	46%	44%	39%	36%	45%	40%
Social Media	39%	35%	33%	40%	36%	32%
Destination or accommodation websites	39%	36%	34%	33%	37%	34%
Online booking engines, travel portals, holiday review sites	38%	36%	28%	32%	35%	30%
Destination websites	39%	33%	27%	35%	33%	31%
Travel agency	28%	25%	24%	30%	28%	21%
Accommodation websites	27%	29%	22%	30%	27%	21%
Features on TV, radio or cinema	24%	20%	24%	23%	18%	23%
Guide books or other books	26%	17%	25%	22%	16%	19%
Features on TV	23%	18%	21%	19%	20%	19%
Features in newspapers, magazines	21%	15%	21%	20%	15%	21%
Advertisements	16%	17%	19%	21%	16%	16%
Online streaming (Netflix, podcasts...)	16%	12%	17%	22%	12%	16%
Features in magazines	18%	12%	16%	16%	14%	13%
Travel fairs	11%	9%	15%	17%	9%	11%
Artificial intelligence (e.g., ChatGPT)	9%	8%	14%	17%	7%	11%
Features in newspapers	10%	10%	12%	13%	8%	10%
Cinema	8%	8%	9%	13%	7%	7%
Features on radio	5%	4%	8%	6%	4%	4%
None of the above / no sources	2%	2%	4%	2%	3%	3%

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.

	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Instagram	79%	70%	66%	70%	73%	64%
Youtube	57%	52%	64%	61%	57%	56%
Facebook	45%	52%	58%	56%	51%	55%
TikTok	51%	50%	47%	57%	52%	46%
WhatsApp	33%	37%	49%	38%	35%	41%
Pinterest	30%	25%	31%	30%	23%	29%
X	16%	16%	23%	22%	21%	14%
Snapchat	14%	12%	22%	21%	14%	15%

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

Preferred sources of travel inspiration

— Average **13 European source markets**



	Cross-border	Generally prefer lesser-known sites	Iconic sites mostly	Longer trip	New destination	Organised myself	Quality-oriented
Recommendation from family, friends, acquaintances	46%	43%	41%	43%	42%	44%	41%
Online search engine	44%	41%	39%	46%	41%	43%	41%
Destination or accommodation websites	36%	36%	34%	40%	35%	36%	37%
Destination websites	37%	39%	31%	38%	35%	35%	37%
Social Media	36%	28%	38%	37%	35%	33%	34%
Online booking engines, travel portals, holiday review sites	34%	30%	34%	35%	34%	32%	34%
Accommodation websites	28%	27%	26%	31%	27%	26%	28%
Travel agency	27%	22%	30%	34%	27%	17%	29%
Guide books or other books	25%	22%	21%	24%	23%	20%	23%
Features on TV, radio or cinema	25%	21%	21%	23%	21%	20%	22%
Features on TV	22%	20%	20%	22%	21%	20%	24%
Features in newspapers, magazines	20%	19%	18%	20%	19%	17%	20%
Features in magazines	17%	18%	15%	18%	16%	14%	19%
Advertisements	16%	14%	18%	20%	17%	15%	17%
Online streaming (Netflix, podcasts...)	15%	13%	16%	16%	15%	14%	16%
Features in newspapers	11%	10%	10%	12%	10%	9%	12%
Travel fairs	9%	8%	12%	14%	11%	8%	11%
Artificial intelligence (e.g., ChatGPT)	8%	8%	12%	10%	10%	8%	10%
Cinema	9%	8%	8%	8%	8%	8%	9%
Features on radio	5%	4%	5%	6%	5%	4%	5%
None of the above / no sources	2%	6%	2%	2%	2%	4%	2%

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

	Cross-border	Generally prefer lesser-known sites	Iconic sites mostly	Longer trip	New destination	Organised myself	Quality-oriented
Instagram	80%	73%	73%	73%	74%	74%	75%
Youtube	60%	57%	57%	66%	58%	56%	61%
Facebook	49%	53%	51%	60%	50%	50%	51%
TikTok	52%	47%	56%	54%	53%	48%	52%
WhatsApp	36%	33%	37%	42%	36%	33%	37%
Pinterest	23%	29%	27%	26%	28%	25%	28%
X	21%	20%	19%	23%	19%	17%	23%
Snapchat	11%	13%	19%	19%	16%	13%	16%

Preferred sources of travel inspiration

— Average 13 European source markets

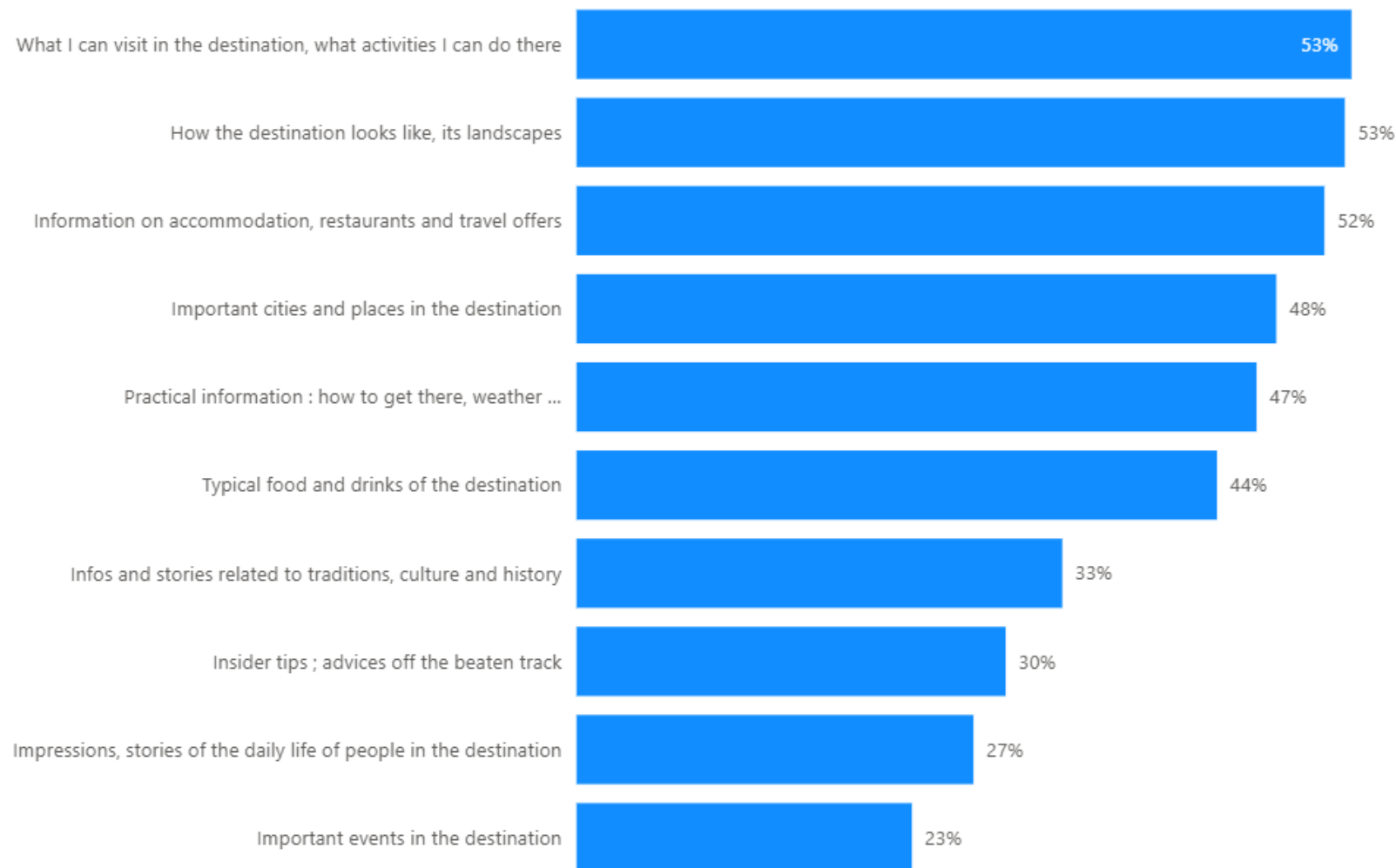


	Camping	Castles	City	Countryside	Culinary	Culture	Cycling	Events	Family	Hiking	Industrial Heritage	Luxury	MTB	Nature	Remembrance	Sustainability	Wellness	Wine
Recommendation from family, friends, acquaintances	43%	45%	45%	43%	47%	45%	39%	45%	48%	44%	39%	41%	38%	47%	41%	43%	40%	45%
Online search engine	40%	45%	45%	42%	46%	44%	38%	41%	45%	43%	40%	42%	37%	46%	40%	41%	41%	43%
Social Media	41%	37%	40%	39%	40%	38%	39%	44%	41%	36%	38%	45%	40%	37%	37%	40%	42%	39%
Destination or accommodation websites	35%	38%	38%	37%	38%	38%	35%	35%	38%	37%	35%	36%	32%	39%	34%	35%	35%	38%
Destination websites	31%	39%	38%	35%	38%	36%	33%	36%	36%	37%	31%	37%	32%	38%	37%	36%	33%	38%
Online booking engines, travel portals, holiday review sites	32%	36%	37%	34%	36%	37%	33%	35%	37%	35%	35%	35%	33%	36%	34%	35%	35%	37%
Accommodation websites	26%	30%	29%	31%	30%	29%	25%	32%	30%	27%	29%	33%	29%	29%	31%	31%	30%	31%
Travel agency	27%	29%	29%	29%	29%	30%	29%	32%	31%	27%	30%	33%	29%	28%	27%	31%	31%	31%
Features on TV, radio or cinema	24%	26%	24%	25%	22%	25%	26%	25%	21%	23%	26%	21%	25%	22%	25%	25%	23%	25%
Guide books or other books	23%	25%	23%	24%	21%	26%	26%	23%	20%	25%	25%	20%	24%	23%	26%	23%	21%	26%
Features on TV	18%	24%	23%	22%	22%	23%	22%	24%	22%	22%	22%	23%	22%	23%	23%	23%	21%	23%
Features in newspapers, magazines	21%	22%	20%	21%	18%	22%	23%	21%	17%	21%	22%	18%	22%	20%	22%	20%	18%	23%
Advertisements	21%	19%	19%	21%	18%	19%	21%	22%	19%	19%	21%	22%	23%	18%	22%	21%	22%	20%
Online streaming (Netflix, podcasts...)	19%	18%	17%	19%	15%	17%	20%	21%	15%	16%	21%	21%	21%	14%	20%	20%	19%	19%
Features in magazines	14%	16%	18%	15%	16%	18%	15%	18%	15%	16%	16%	17%	15%	16%	18%	18%	17%	18%
Travel fairs	16%	14%	13%	15%	11%	13%	17%	16%	12%	14%	18%	15%	18%	12%	15%	15%	16%	15%
Artificial intelligence (e.g., ChatGPT)	16%	11%	10%	14%	9%	11%	17%	14%	10%	12%	16%	15%	19%	10%	14%	14%	14%	13%
Features in newspapers	10%	11%	11%	11%	10%	12%	14%	13%	10%	11%	15%	12%	13%	11%	14%	12%	11%	12%
Cinema	11%	8%	10%	10%	8%	9%	12%	12%	8%	9%	13%	13%	11%	9%	13%	10%	12%	10%
Features on radio	6%	5%	5%	7%	4%	5%	9%	6%	5%	6%	7%	7%	9%	5%	7%	6%	7%	5%
None of the above / no sources	2%	2%	2%	2%	2%	2%	2%	1%	2%	2%	1%	1%	1%	3%	1%	1%	1%	2%
Instagram	71%	71%	77%	69%	75%	75%	69%	74%	74%	72%	73%	75%	69%	73%	71%	74%	74%	72%
Youtube	61%	62%	59%	62%	59%	63%	66%	61%	58%	62%	63%	62%	65%	61%	63%	62%	60%	62%
Facebook	58%	58%	51%	64%	50%	52%	61%	52%	55%	58%	61%	54%	61%	54%	59%	56%	54%	59%
TikTok	54%	50%	53%	52%	52%	54%	51%	57%	52%	48%	57%	61%	55%	49%	54%	56%	58%	51%
WhatsApp	45%	36%	37%	44%	37%	36%	50%	43%	38%	41%	47%	44%	55%	36%	42%	45%	43%	41%
Pinterest	30%	30%	29%	30%	26%	32%	29%	32%	28%	27%	35%	31%	32%	28%	31%	32%	31%	32%
X	21%	19%	18%	23%	19%	21%	27%	24%	21%	21%	28%	24%	29%	19%	26%	23%	23%	26%
Snapchat	18%	17%	16%	20%	15%	17%	22%	20%	15%	16%	24%	23%	25%	14%	20%	21%	22%	18%

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

Preferred type of content for travel inspiration

 — Average **13 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. Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report.

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

Preferred type of content for travel inspiration

— Average **13 European source markets**



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
What I can visit in the destination, what activities I can do there	45%	51%	50%	52%	48%	58%	54%	48%	72%	55%	57%	48%	56%
How the destination looks like, its landscapes	54%	54%	49%	54%	54%	50%	45%	50%	66%	52%	56%	51%	53%
Information on accommodation, restaurants and travel offers	46%	53%	49%	46%	48%	56%	50%	48%	67%	51%	56%	46%	54%
Important cities and places in the destination	44%	46%	49%	47%	43%	49%	55%	38%	61%	55%	48%	44%	47%
Practical information : how to get there, weather ...	43%	51%	47%	40%	42%	56%	47%	43%	53%	46%	52%	41%	50%
Typical food and drinks of the destination	40%	37%	46%	36%	42%	57%	41%	27%	61%	53%	46%	38%	50%
Impressions, stories of the daily life of people in the destination	29%	20%	29%	19%	30%	28%	23%	25%	39%	25%	36%	26%	26%
Infos and stories related to traditions, culture and history	34%	26%		35%	34%		38%	27%		40%		36%	31%
Insider tips ; advices off the beaten track	40%	29%		22%	33%		16%	32%		37%		31%	28%
Important events in the destination	20%	20%		25%	19%		26%	19%		30%		22%	26%

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 this and the following pages.

Preferred type of content for travel inspiration

🇪🇺 — Average **13 European source markets**



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
How the destination looks like, its landscapes	57%	50%	49%	47%	55%	47%
What I can visit in the destination, what activities I can do there	61%	55%	45%	42%	51%	50%
Information on accommodation, restaurants and travel offers	52%	53%	42%	44%	56%	47%
Important cities and places in the destination	58%	46%	37%	42%	46%	46%
Practical information : how to get there, weather ...	48%	48%	42%	37%	49%	44%
Typical food and drinks of the destination	48%	43%	39%	40%	45%	41%
Infos and stories related to traditions, culture and history	44%	28%	31%	35%	27%	33%
Insider tips ; advices off the beaten track	38%	26%	29%	28%	25%	29%
Impressions, stories of the daily life of people in the destination	33%	25%	29%	31%	24%	25%
Important events in the destination	27%	20%	23%	28%	20%	24%

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 this and the following pages.

Preferred type of content for travel inspiration

 — Average **13 European source markets**



	Past visits (ovn)	Travel intent Lux: high/very high
What I can visit in the destination, what activities I can do there	52%	55%
How the destination looks like, its landscapes	51%	56%
Information on accommodation, restaurants and travel offers	50%	54%
Important cities and places in the destination	48%	53%
Practical information : how to get there, weather ...	46%	48%
Typical food and drinks of the destination	43%	48%
Infos and stories related to traditions, culture and history	39%	39%
Insider tips ; advices off the beaten track	31%	32%
Impressions, stories of the daily life of people in the destination	30%	31%
Important events in the destination	26%	27%

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 this and the following pages.

Preferred type of content for travel inspiration

 — Average **13 European source markets**



	Cross-border	Generally prefer lesser-known sites	Iconic sites mostly	Longer trip	New destination	Organised myself	Quality-oriented
How the destination looks like, its landscapes	56%	55%	48%	54%	52%	53%	53%
What I can visit in the destination, what activities I can do there	54%	49%	51%	53%	51%	51%	51%
Information on accommodation, restaurants and travel offers	50%	50%	47%	52%	48%	49%	50%
Important cities and places in the destination	53%	41%	50%	51%	47%	47%	49%
Practical information : how to get there, weather ...	47%	46%	42%	47%	44%	45%	44%
Typical food and drinks of the destination	45%	42%	39%	47%	40%	41%	42%
Infos and stories related to traditions, culture and history	38%	33%	33%	39%	34%	33%	36%
Insider tips ; advices off the beaten track	32%	34%	24%	31%	30%	30%	30%
Impressions, stories of the daily life of people in the destination	26%	27%	25%	30%	25%	25%	26%
Important events in the destination	26%	22%	25%	27%	24%	23%	25%

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 this and the following pages.

Preferred sources of travel inspiration

— Average **13** European source markets



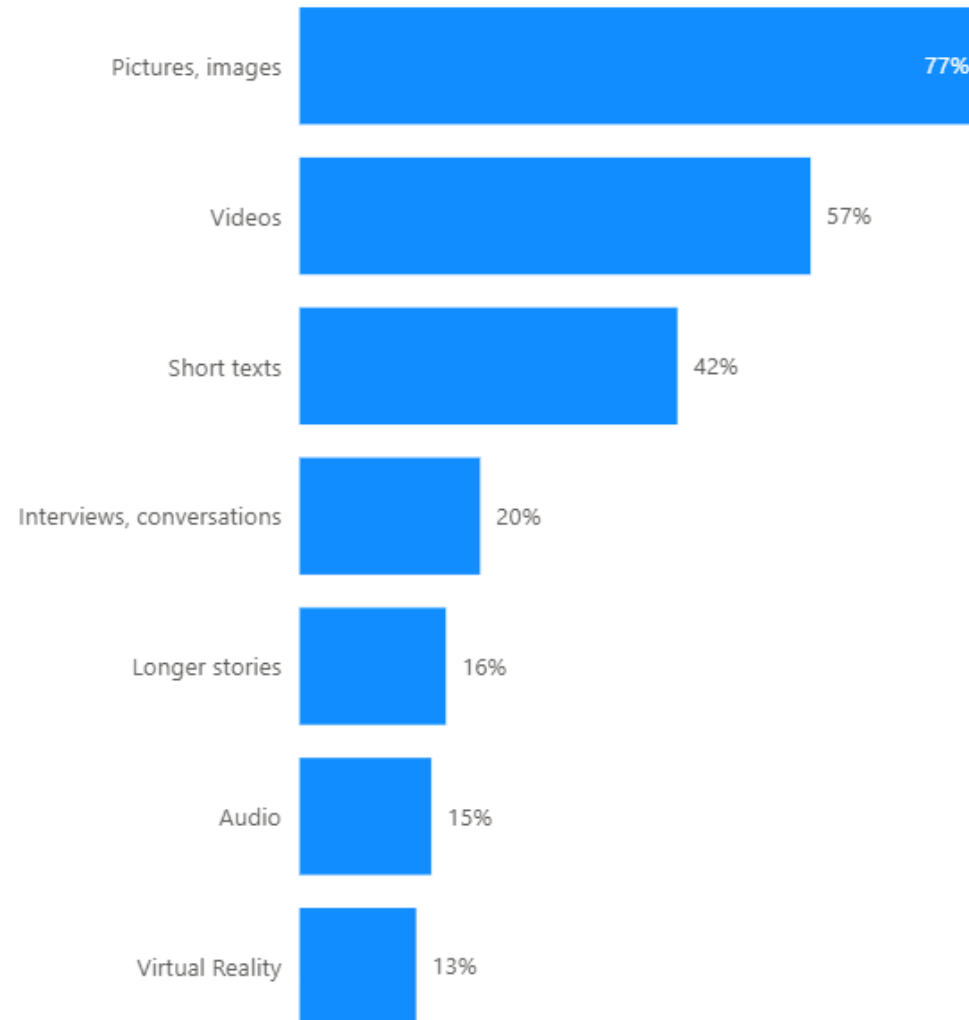
	Camping	Castles	City	Countryside	Culinary	Culture	Cycling	Events	Family	Hiking	Industrial Heritage	Luxury	MTB	Nature	Remembrance	Sustainability	Wellness	Wine
How the destination looks like, its landscapes	51%	54%	53%	52%	55%	54%	47%	50%	54%	55%	46%	50%	45%	59%	49%	50%	49%	51%
What I can visit in the destination, what activities I can do there	48%	56%	56%	50%	56%	57%	45%	52%	55%	54%	48%	48%	43%	57%	48%	49%	48%	51%
Information on accommodation, restaurants and travel offers	45%	51%	53%	49%	56%	52%	45%	49%	53%	50%	46%	49%	43%	53%	45%	48%	49%	52%
Important cities and places in the destination	43%	54%	58%	45%	51%	56%	43%	50%	49%	47%	48%	47%	41%	50%	47%	47%	45%	48%
Typical food and drinks of the destination	41%	46%	47%	45%	54%	47%	40%	45%	45%	43%	45%	46%	40%	46%	39%	45%	44%	52%
Practical information : how to get there, weather ...	43%	47%	47%	44%	48%	47%	40%	42%	47%	47%	41%	42%	38%	49%	41%	43%	43%	44%
Infos and stories related to traditions, culture and history	35%	43%	39%	38%	36%	46%	36%	39%	33%	38%	40%	34%	35%	38%	43%	39%	33%	39%
Impressions, stories of the daily life of people in the destination	32%	32%	30%	34%	29%	33%	32%	32%	28%	31%	34%	30%	30%	31%	30%	33%	31%	33%
Insider tips ; advices off the beaten track	31%	32%	32%	32%	31%	32%	30%	31%	29%	33%	30%	27%	29%	33%	31%	31%	26%	32%
Important events in the destination	27%	28%	27%	28%	25%	29%	29%	36%	25%	26%	30%	29%	29%	24%	31%	29%	28%	29%

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

Preferred format of content for travel inspiration

 — Average **9 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 pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Preferred format of content for travel inspiration

 — Average **9 European source markets***



	Past visits (ovn)	Travel intent Lux: high/very high
Pictures, images	77%	81%
Videos	58%	63%
Short texts	41%	41%
Interviews, conversations	23%	22%
Longer stories	20%	17%
Audio	18%	15%
Virtual Reality	15%	13%

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 this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Preferred format of content for travel inspiration

 — Average **9 European source markets***



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Pictures, images	78%	81%		76%	80%		76%	73%		73%		76%	79%
Videos	57%	55%		57%	59%		54%	53%		61%		60%	59%
Short texts	47%	45%		34%	50%		40%	51%		35%		45%	32%
Interviews, conversations	20%	18%		21%	21%		18%	18%		21%		24%	22%
Longer stories	18%	12%		15%	17%		16%	13%		17%		20%	18%
Audio	16%	11%		13%	17%		13%	12%		18%		18%	15%
Virtual Reality	13%	12%		16%	13%		9%	12%		10%		17%	15%

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 this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Preferred format of content for travel inspiration

 — Average **9 European source markets***



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Pictures, images	79%	78%	69%	65%	80%	72%
Videos	60%	54%	53%	57%	58%	51%
Short texts	44%	42%	43%	35%	41%	45%
Interviews, conversations	22%	19%	24%	26%	16%	22%
Longer stories	17%	15%	23%	23%	13%	18%
Audio	15%	12%	20%	26%	11%	16%
Virtual Reality	12%	12%	18%	24%	10%	14%

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 this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT



6

Travel party

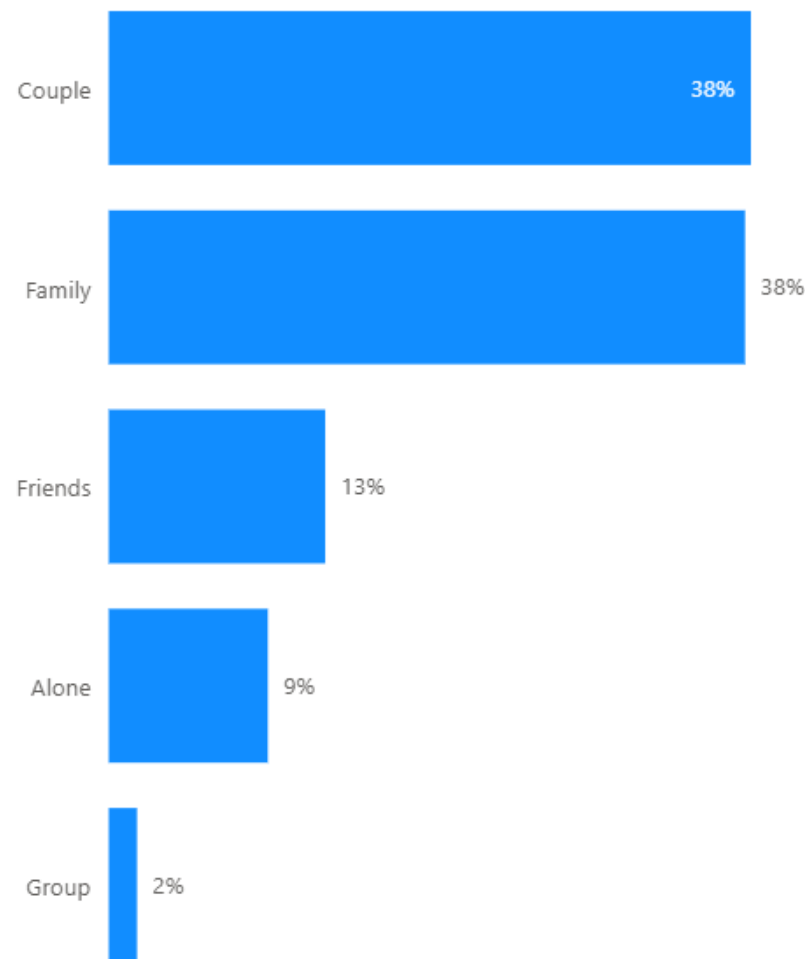
Travel party : Key insights



- **Couples and families are the dominant travel groups.** The majority of potential Luxembourg visitors travel as couples or families. Solo travellers and group travel play a subordinate role.
- **Target segments differ in travel party composition.** NLA and family-oriented segments naturally show different patterns than EXP or PS, with implications for product development and communication.

Travel party during most recent outbound holiday trip

🇪🇺 — Average **13 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, LFT target segments, theme interest groups and further demand indicators are presented on the following pages.

Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report.

Travel party during most recent outbound holiday trip



— Average **13 European source markets**



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Couple	42%	36%	28%	40%	38%	36%	44%	38%	35%	49%	32%	40%	39%
Family	34%	40%	50%	37%	33%	42%	27%	36%	46%	31%	44%	32%	38%
Friends	14%	14%	10%	13%	13%	13%	16%	16%	10%	11%	12%	13%	11%
Alone	9%	8%	10%	8%	13%	8%	10%	7%	7%	8%	11%	13%	10%
Group	1%	2%	1%	2%	3%	1%	3%	2%	2%	1%	1%	1%	1%

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

Travel party during most recent outbound holiday trip



— Average **13 European source markets**



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Family	33%	44%	35%	37%	40%	35%
Couple	40%	33%	38%	36%	40%	36%
Friends	14%	13%	12%	14%	11%	15%
Alone	10%	8%	14%	10%	9%	11%
Group	2%	2%	2%	3%	1%	2%

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

Travel party during most recent outbound holiday trip

 — Average **13 European source markets**



	Past visits (ovn)	Travel intent Lux: high/very high
Couple	42%	40%
Family	35%	38%
Friends	11%	11%
Alone	11%	10%
Group	1%	1%

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

Travel party during most recent outbound holiday trip

🇪🇺 — Average **13 European source markets**



	Cross-border	Generally prefer lesser-known sites	Iconic sites mostly	Longer trip	New destination	Organised myself	Quality-oriented
Couple	45%	43%	38%	39%	41%	41%	43%
Family	33%	29%	37%	39%	34%	35%	35%
Friends	12%	14%	14%	11%	14%	13%	12%
Alone	10%	12%	8%	10%	8%	11%	8%
Group	1%	2%	2%	1%	2%	1%	2%

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

Preferred sources of travel inspiration

— Average **13 European source markets**



	Camping	Castles	City	Countryside	Culinary	Culture	Cycling	Events	Family	Hiking	Industrial Heritage	Luxury	MTB	Nature	Remembrance	Sustainability	Wellness	Wine
Family	39%	36%	38%	37%	38%	37%	39%	39%	53%	35%	37%	41%	40%	36%	34%	39%	39%	34%
Couple	35%	40%	37%	38%	39%	38%	37%	34%	31%	40%	37%	36%	33%	40%	40%	35%	37%	41%
Friends	14%	12%	13%	13%	12%	13%	12%	15%	8%	12%	13%	13%	14%	12%	13%	13%	13%	13%
Alone	9%	9%	9%	10%	9%	10%	10%	10%	5%	11%	11%	9%	10%	10%	10%	10%	9%	9%
Group	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	3%	2%	2%	2%

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, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.



7

**Quality orientation – Mode of organisation –
Destination type – Decision steps**

Quality orientation – Mode of organisation – Destination type – Decision steps :

Key insights



- **Quality orientation is broadly anchored.** Roughly half of respondents prefer quality over lower prices — a profile that aligns well with Luxembourg's positioning as a high-quality destination.
- **Self-organisation dominates booking behaviour.** The overwhelming majority organise their trips independently. This underscores the importance of online content, booking platforms and user-friendly web infrastructure for LFT.
- **Demand for new destinations is strong.** A significant share of respondents chose a previously unvisited destination on their last outbound trip. Luxembourg can capitalise on this "novelty effect", particularly in markets with low repeat visitation rates.
- **The destination is often chosen first.** In the decision chain, destination choice often comes first — before accommodation, activities or transport. This means Luxembourg must primarily inspire as an overall destination, not through individual products.
- **Theme affinity influences the decision sequence.** Respondents with interest in niche themes (e.g. hiking, cycling, wine) more frequently choose the activity first and the destination second. For these segments, theme-specific marketing (e.g. "Hiking in Luxembourg") is more effective as an entry point.

Quality orientation – Mode of organisation – Destination type

— Average 9 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, theme interest groups and further demand indicators are presented on the following pages. Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report.



* DE-FR-BE-NL-UK-CH-AT-ES-IT

Quality orientation – Mode of organisation – Destination type

— Average 9 European source markets*



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Quality-oriented	49%	48%		54%	53%		43%	47%		53%		60%	45%

	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Organised myself	74%	72%		69%	67%		73%	69%		70%		76%	67%
Organised via travel agency	26%	28%		31%	33%		27%	31%		30%		24%	33%

	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
New destination	67%	67%		73%	67%		84%	73%		85%		70%	63%

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

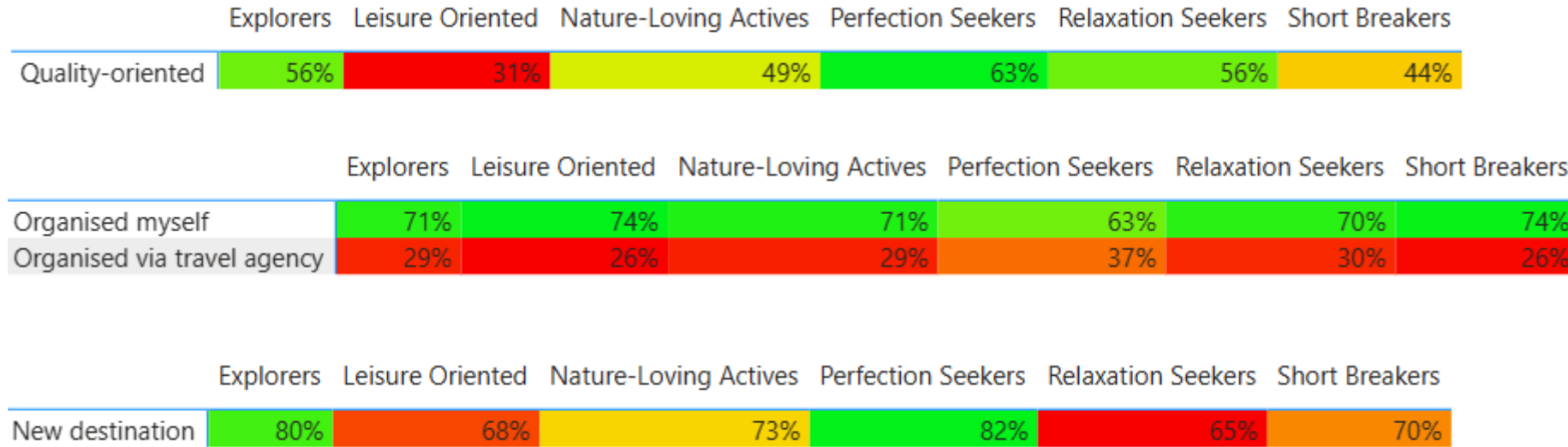
- Quality-oriented : prefer to look for higher quality offers rather than more affordable offers (even if it involves paying a slightly higher price)
- Organised myself : all travel arrangements during the most recent outbound holiday trip were organised by respondents themselves (rather than through a tour operator or agency)
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Percentages by source markets, past visitors, new potential visitors, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Quality orientation – Mode of organisation – Destination type

 — Average 9 European source markets*



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

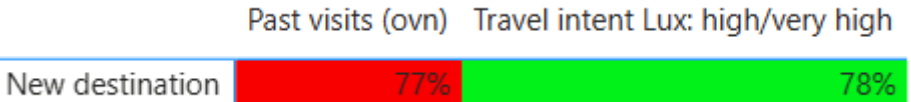
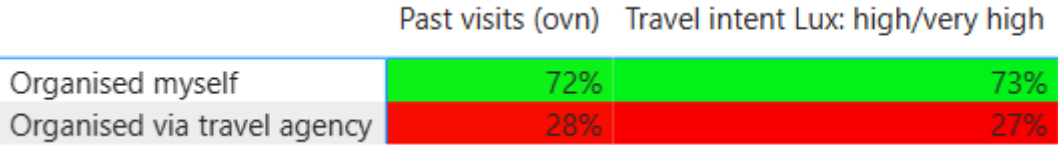
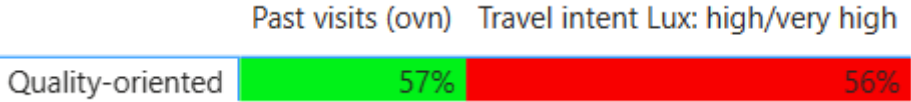
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- Organised myself : all travel arrangements during the most recent outbound holiday trip were organised by respondents themselves (rather than through a tour operator or agency)
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Percentages by source markets, past visitors, new potential visitors, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Quality orientation – Mode of organisation – Destination type

 — Average 9 European source markets*



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

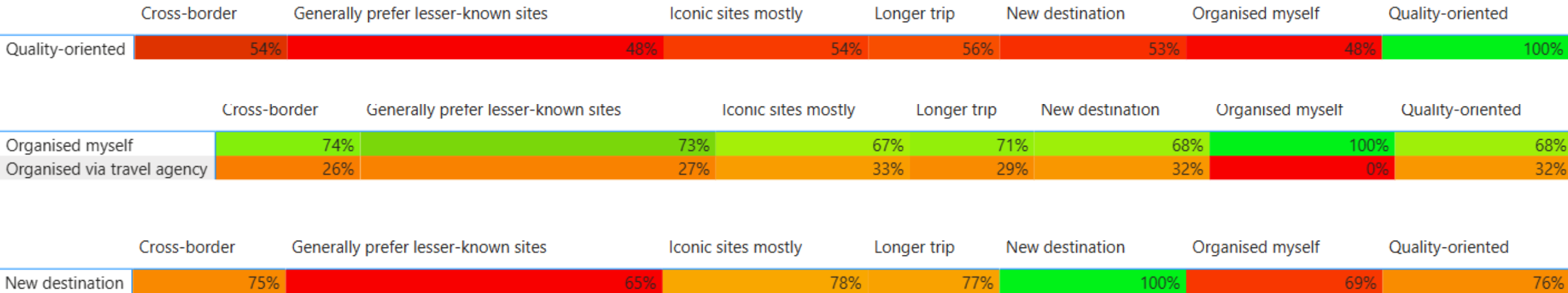
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Percentages by source markets, past visitors, new potential visitors, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

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Quality orientation – Mode of organisation – Destination type

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* DE-FR-BE-NL-UK-CH-AT-ES-IT

Quality orientation – Mode of organisation – Destination type

 — Average **9 European source markets***



	Camping	Castles	City	Countryside	Culinary	Culture	Cycling	Events	Family	Hiking	Industrial Heritage	Luxury	MTB	Nature	Remembrance	Sustainability	Wellness	Wine
Quality-oriented	48%	52%	54%	52%	56%	55%	55%	56%	53%	51%	54%	65%	56%	52%	53%	54%	58%	57%
Organised myself	70%	70%	70%	69%	71%	69%	68%	68%	70%	72%	65%	64%	67%	72%	69%	66%	66%	68%
Organised via travel agency	30%	30%	30%	31%	29%	31%	32%	32%	30%	28%	35%	36%	33%	28%	31%	34%	34%	32%
New destination	79%	76%	76%	78%	73%	77%	79%	81%	74%	76%	82%	80%	83%	73%	80%	80%	78%	78%

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

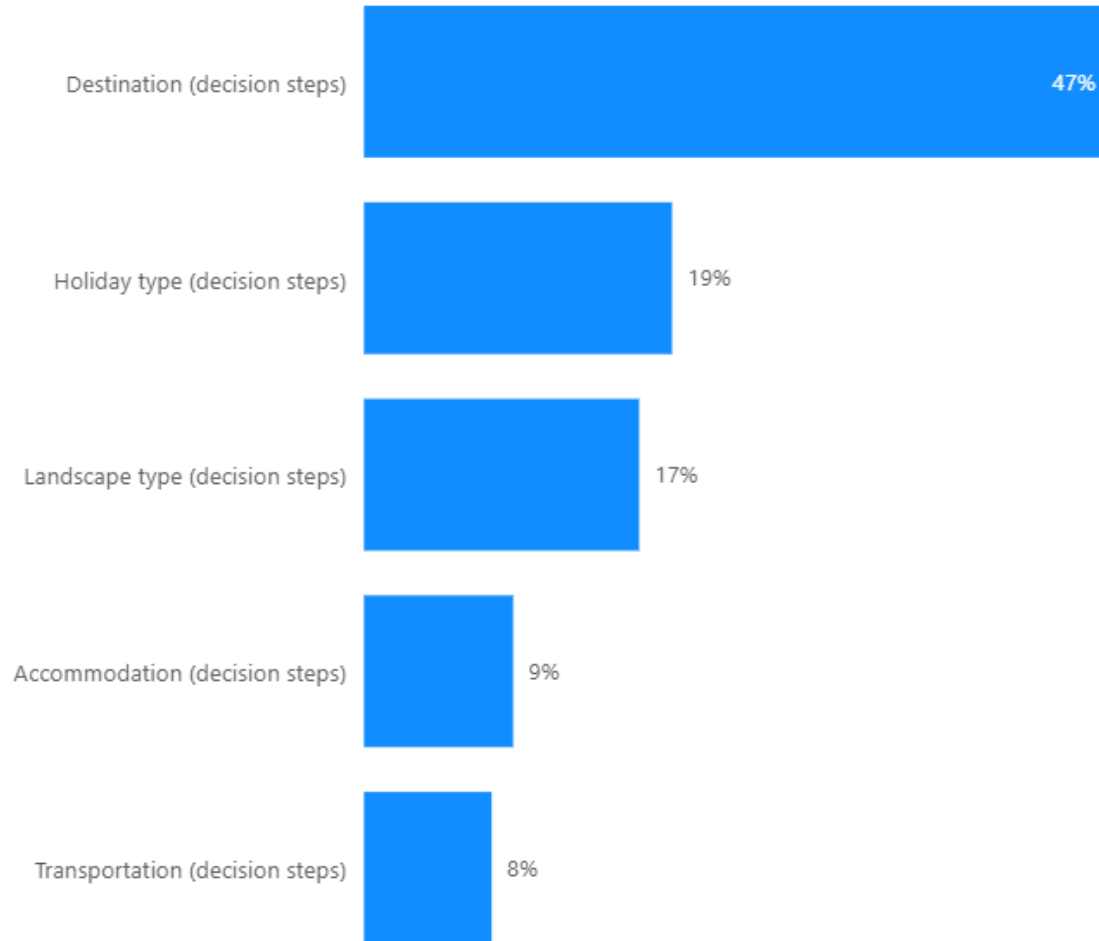
- Quality-oriented : prefer to look for higher quality offers rather than more affordable offers (even if it involves paying a slightly higher price)
- Organised myself : all travel arrangements during the most recent outbound holiday trip were organised by respondents themselves (rather than through 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, theme interest groups and further demand indicators are presented on this and the following pages.

Decision steps



— Average **9 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, theme interest groups and further demand indicators are presented on the following pages.

Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Decision steps



— Average **9 European source markets***



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Destination (decision steps)	43%	50%		46%	45%		46%	44%		53%		42%	49%
Holiday type (decision steps)	21%	17%		15%	17%		24%	22%		16%		19%	20%
Landscape type (decision steps)	20%	14%		16%	22%		13%	17%		15%		21%	16%
Accommodation (decision steps)	9%	9%		10%	10%		7%	11%		10%		10%	7%
Transportation (decision steps)	7%	10%		11%	6%		9%	6%		7%		8%	7%

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, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Decision steps



— Average **9 European source markets***



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Destination (decision steps)	51%	45%	37%	35%	49%	41%
Holiday type (decision steps)	21%	18%	22%	22%	15%	25%
Landscape type (decision steps)	14%	17%	21%	22%	19%	15%
Accommodation (decision steps)	6%	11%	10%	11%	10%	10%
Transportation (decision steps)	7%	9%	10%	10%	8%	8%

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, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Decision steps



— Average **9 European source markets***



	Past visits (ovn)	Travel intent Lux: high/very high
Destination (decision steps)	46%	48%
Holiday type (decision steps)	21%	19%
Landscape type (decision steps)	17%	18%
Accommodation (decision steps)	9%	8%
Transportation (decision steps)	7%	7%

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, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Decision steps



— Average **9 European source markets***



	Cross-border	Generally prefer lesser-known sites	Iconic sites mostly	Longer trip	New destination	Organised myself	Quality-oriented
Destination (decision steps)	49%	47%	45%	47%	46%	48%	47%
Holiday type (decision steps)	19%	17%	21%	20%	21%	18%	20%
Landscape type (decision steps)	17%	17%	17%	18%	18%	16%	17%
Accommodation (decision steps)	8%	10%	9%	9%	8%	10%	9%
Transportation (decision steps)	7%	9%	8%	7%	7%	9%	7%

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, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT



Decision steps

 — Average **9 European source markets***

	Camping	Castles	City	Countryside	Culinary	Culture	Cycling	Events	Family	Hiking	Industrial Heritage	Luxury	MTB	Nature	Remembrance	Sustainability	Wellness	Wine
Destination (decision steps)	38%	44%	46%	40%	48%	45%	38%	41%	45%	43%	38%	39%	34%	46%	40%	39%	38%	41%
Holiday type (decision steps)	22%	21%	22%	22%	19%	23%	23%	23%	19%	21%	24%	22%	24%	19%	23%	22%	22%	22%
Landscape type (decision steps)	20%	18%	16%	21%	17%	17%	21%	19%	19%	19%	20%	21%	23%	19%	20%	20%	21%	19%
Accommodation (decision steps)	10%	8%	8%	9%	9%	8%	9%	9%	10%	9%	9%	11%	9%	9%	8%	10%	11%	10%
Transportation (decision steps)	10%	8%	8%	8%	7%	8%	9%	8%	7%	8%	8%	8%	10%	7%	8%	9%	8%	8%

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, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT



8

Sustainability aspects

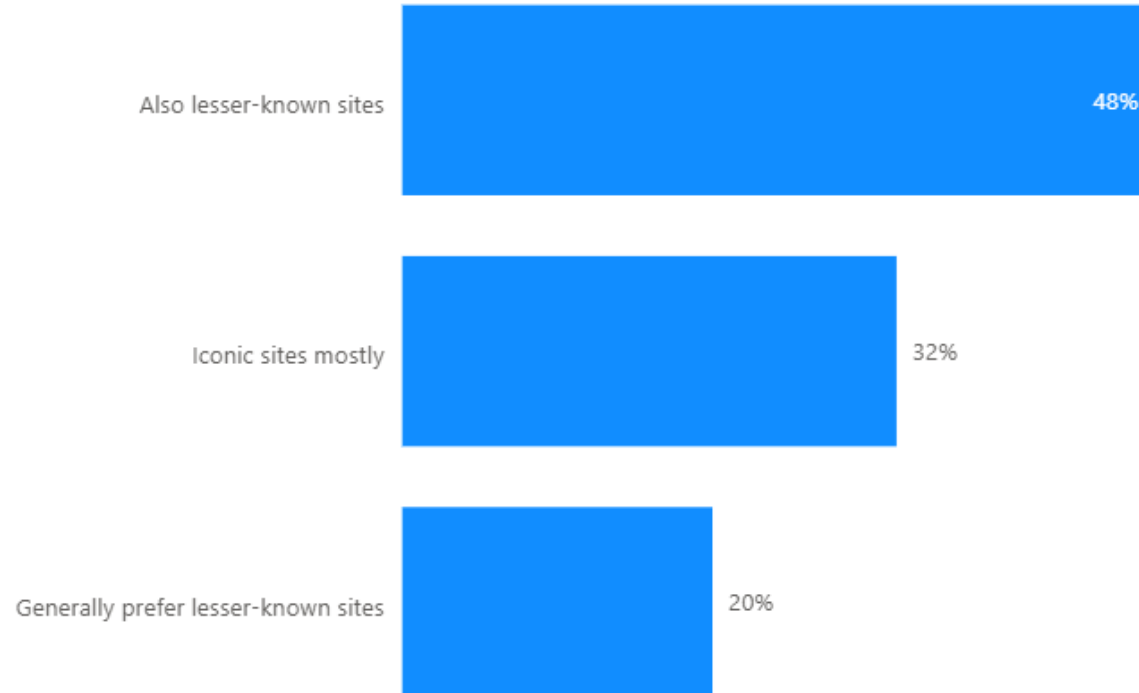
Sustainability aspects : Key insights



- **Openness to visiting lesser-known sites is high.** A significant share of respondents prefer "lesser-known sites" over iconic, overcrowded attractions. This aligns ideally with Luxembourg's positioning as an "insider tip" and can be leveraged for visitor flow management.
- **Sustainability has limited decision relevance but shows potential.** Sustainability ranks in the mid-range for both theme interest and brand attributes. At the same time, a relevant share of respondents indicates that better information and good value for money on sustainable options could persuade them. The topic serves less as a pull factor and more as a potential differentiation lever.
- **Sustainability resonates with specific segments.** EXP and PS in particular show above-average interest. In markets such as Switzerland, the Nordics and Belgium, sustainability sensitivity is also more pronounced.

Preference for iconic sites vs. lesser-known sites

🇪🇺 — Average 9 European source markets*



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

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Preference for iconic sites vs. lesser-known sites

🇪🇺 — Average 9 European source markets*



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Also lesser-known sites	47%	50%		51%	48%		53%	42%		57%		46%	42%
Iconic sites mostly	31%	30%		28%	30%		30%	36%		29%		33%	38%
Generally prefer lesser-known sites	22%	21%		21%	22%		18%	22%		14%		21%	19%

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 source markets, past visitors, new potential visitors, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Preference for iconic sites vs. lesser-known sites

 — Average **9 European source markets***



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Also lesser-known sites	48%	48%	48%	45%	49%	49%
Iconic sites mostly	34%	33%	27%	37%	29%	32%
Generally prefer lesser-known sites	18%	19%	25%	18%	22%	19%

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 source markets, past visitors, new potential visitors, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Preference for iconic sites vs. lesser-known sites

 — Average **9 European source markets***



	Past visits (ovn)	Travel intent Lux: high/very high
Also lesser-known sites	46%	47%
Iconic sites mostly	34%	34%
Generally prefer lesser-known sites	19%	19%

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 source markets, past visitors, new potential visitors, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Preference for iconic sites vs. lesser-known sites

 — Average 9 European source markets*



	Cross-border	Generally prefer lesser-known sites	Iconic sites mostly	Longer trip	New destination	Organised myself	Quality-oriented
Iconic sites mostly	31%	0%	100%	34%	34%	30%	34%
Also lesser-known sites	50%	0%	0%	47%	48%	50%	47%
Generally prefer lesser-known sites	19%	100%	0%	19%	18%	20%	19%

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 source markets, past visitors, new potential visitors, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Preference for iconic sites vs. lesser-known sites

 — Average **9 European source markets***



	Camping	Castles	City	Countryside	Culinary	Culture	Cycling	Events	Family	Hiking	Industrial Heritage	Luxury	MTB	Nature	Remembrance	Sustainability	Wellness	Wine
Also lesser-known sites	45%	46%	45%	45%	48%	45%	46%	42%	46%	49%	44%	41%	43%	50%	43%	45%	43%	46%
Iconic sites mostly	36%	38%	40%	34%	33%	39%	34%	43%	36%	29%	43%	43%	38%	28%	42%	37%	39%	35%
Generally prefer lesser-known sites	19%	16%	15%	21%	20%	16%	19%	15%	18%	22%	14%	16%	18%	22%	15%	18%	17%	19%

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 source markets, past visitors, new potential visitors, LFT target segments, theme interest groups and further demand indicators are presented on this and the following pages.

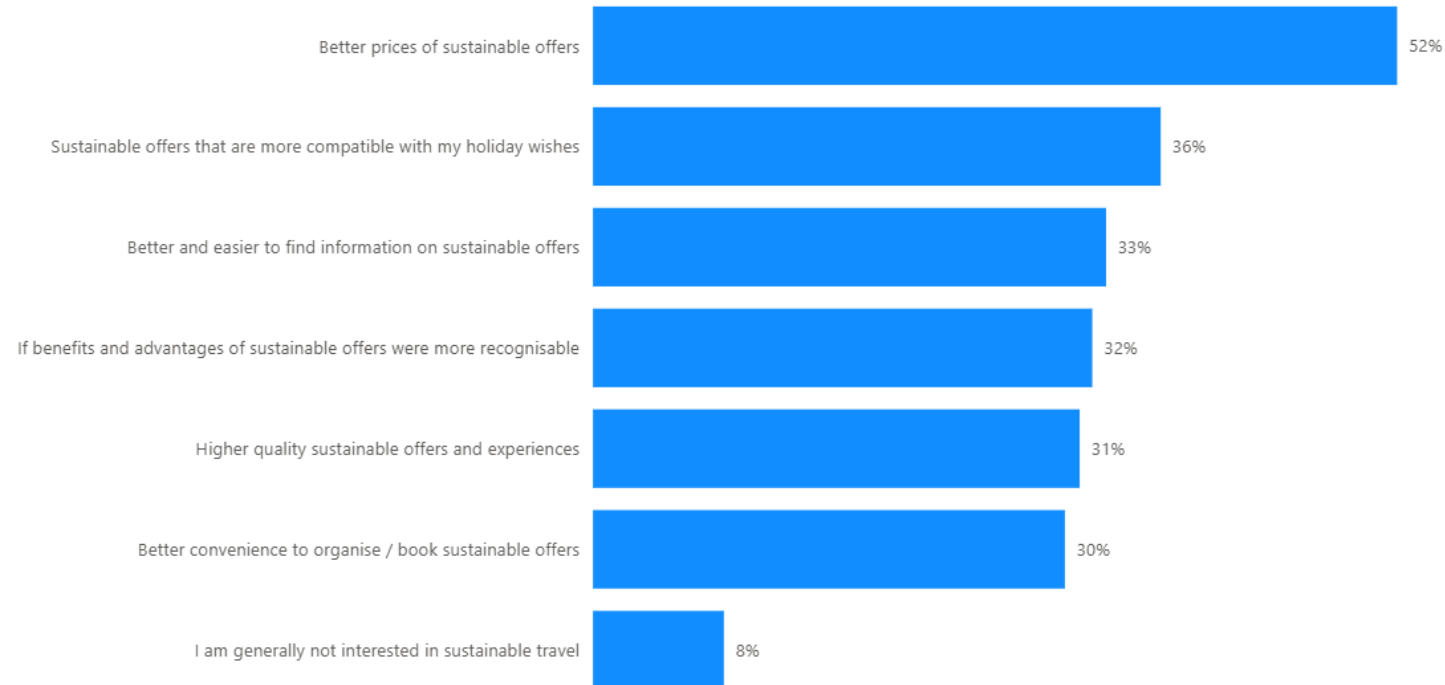
* DE-FR-BE-NL-UK-CH-AT-ES-IT

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



Sustainability vs. prices

— Average 9 European source markets*



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

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

Further cross-breakdowns by past and future visitors and source markets simultaneously are presented as rankings in the „Annexes“ section at the end of the report.

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Sustainability vs. prices

— Average 9 European source markets*



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Better prices of sustainable offers	51%	56%		54%	50%		54%	50%		47%		47%	55%
Sustainable offers that are more compatible with my holiday wishes	36%	33%		34%	37%		39%	35%		40%		39%	34%
Better and easier to find information on sustainable offers	35%	27%		28%	37%		32%	29%		37%		35%	37%
If benefits and advantages of sustainable offers were more recognisable	33%	27%		27%	35%		31%	30%		36%		35%	34%
Higher quality sustainable offers and experiences	30%	26%		31%	36%		29%	24%		38%		37%	31%
Better convenience to organise / book sustainable offers	30%	27%		29%	31%		35%	24%		36%		33%	28%
I am generally not interested in sustainable travel	8%	10%		9%	7%		5%	12%		8%		7%	9%

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

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

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Sustainability vs. prices

 — Average **9 European source markets***



	Explorers	Leisure Oriented	Nature-Loving Actives	Perfection Seekers	Relaxation Seekers	Short Breakers
Better prices of sustainable offers	53%	58%	45%	42%	51%	49%
Sustainable offers that are more compatible with my holiday wishes	41%	32%	37%	39%	35%	32%
Better and easier to find information on sustainable offers	37%	30%	36%	33%	30%	33%
If benefits and advantages of sustainable offers were more recognisable	34%	31%	33%	35%	30%	31%
Higher quality sustainable offers and experiences	34%	26%	33%	38%	30%	29%
Better convenience to organise / book sustainable offers	32%	29%	31%	35%	28%	31%
I am generally not interested in sustainable travel	6%	9%	8%	7%	11%	9%

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

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

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Sustainability vs. prices

 — Average **9 European source markets***



	Past visits (ovn)	Travel intent Lux: high/very high
Better prices of sustainable offers	49%	54%
Sustainable offers that are more compatible with my holiday wishes	41%	40%
Higher quality sustainable offers and experiences	37%	36%
Better and easier to find information on sustainable offers	36%	37%
If benefits and advantages of sustainable offers were more recognisable	35%	35%
Better convenience to organise / book sustainable offers	33%	33%
I am generally not interested in sustainable travel	7%	5%

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

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

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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

Sustainability vs. prices

 — Average **13 European source markets***



	Camping	Castles	City	Countryside	Culinary	Culture	Cycling	Events	Family	Hiking	Industrial Heritage	Luxury	MTB	Nature	Remembrance	Sustainability	Wellness	Wine
Better prices of sustainable offers	47%	51%	53%	50%	53%	52%	48%	51%	54%	51%	48%	48%	47%	53%	48%	51%	49%	50%
Sustainable offers that are more compatible with my holiday wishes	39%	39%	38%	39%	38%	40%	39%	42%	39%	39%	40%	39%	40%	39%	40%	43%	38%	39%
Higher quality sustainable offers and experiences	34%	34%	35%	35%	34%	36%	37%	39%	34%	34%	39%	41%	40%	33%	38%	40%	39%	36%
Better and easier to find information on sustainable offers	36%	37%	35%	37%	35%	37%	37%	38%	34%	37%	38%	34%	38%	37%	37%	40%	35%	36%
If benefits and advantages of sustainable offers were more recognisable	34%	35%	34%	36%	33%	35%	36%	35%	33%	34%	36%	34%	38%	34%	35%	37%	34%	36%
Better convenience to organise / book sustainable offers	35%	33%	33%	34%	31%	33%	36%	36%	33%	33%	37%	35%	37%	32%	36%	37%	36%	34%
I am generally not interested in sustainable travel	6%	7%	7%	5%	7%	6%	5%	4%	7%	6%	5%	5%	4%	7%	6%	2%	5%	6%

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

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

* DE-FR-BE-NL-UK-CH-AT-ES-IT

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



9

Some strategic conclusions

Some strategic conclusions (1)



1. Intensify activation marketing: from "knowing" to "booking"

The largest conversion gap lies between sympathy and travel intent. LFT should intensify the inspiration phase with concrete, booking-proximate content — not merely communicating the destination image, but providing specific travel occasions, experience combinations and easy planning entry points. Particularly in Switzerland and the Netherlands, where high sympathy meets weak activation, targeted conversion marketing (e.g. curated packages, call-to-action campaigns) is warranted.

2. Source market prioritisation: volume markets plus growth markets

Germany, France, Belgium and the Netherlands remain the priority volume markets. Spain, Italy and Portugal deserve increased attention as growth markets — they show disproportionate travel intent combined with still low visitation rates (large net potential). The UK also offers potential through its absolute volume, but requires different channels and messaging.

3. Communicate the theme portfolio in two tiers

The study clearly shows that Luxembourg's strongest competences lie in city, culinary, nature and culture. These "anchor themes" should serve as entry points in broad-reach communication. Building on these, niche themes (hiking, cycling, wine, industrial heritage, remembrance) can be targeted at engaged segments — they serve as a differentiation factor and extend length of stay.

4. Rewrite the spontaneous image towards tourism

Communication should deliberately build key tourism visuals — city panoramas, natural landscapes, culinary scenes — that contextualise the financial-centre association in spontaneous perception. The visitor data demonstrates that it works: those who have been there think differently about Luxembourg.

5. Address the "not interesting enough" barrier

Half of non-choosers find other destinations more interesting; nearly a quarter simply do not know Luxembourg well enough. Both are inspiration deficits. LFT should: (a) produce content showcasing unexpected sides of Luxembourg, strengthening "surprising", "varied", "lively" as brand attributes, (b) raise awareness levels in medium-haul markets through targeted always-on campaigns, and (c) develop the "insider tip" positioning further — it resonates in the brand study but is not yet sufficiently activated.

Some strategic conclusions (2)



6. Evolve the social media mix, build AI visibility

Instagram and YouTube remain the lead channels, but TikTok (50%) has nearly caught up with Facebook and is growing rapidly in younger segments. LFT should professionalise its TikTok presence and expand creator partnerships. In parallel, visibility in AI-based travel information systems (ChatGPT, Perplexity, Google AI Overviews) should be proactively managed — 9% already use these as an inspiration source, with an upward trend.

7. Strengthen value-for-money communication

"Affordable" is the weakest brand attribute, and price can be a recurring reason for non-selection. Communication must make value tangible: quality of experiences, inclusive benefits (Luxembourg Card, free public transport), compact distances and the possibility of experiencing a great deal in a short time.

8. Optimise the first-visit experience

Since visitors systematically show better sympathy and repeat-visit scores, first-visit quality is a strategic multiplier. Investments in welcome infrastructure, digital on-site services and the experience of the first few hours pay off across the entire brand funnel and generate the most effective inspiration source of all: personal recommendation (ranked #1 in travel inspiration at 45%).

9. Position sustainability as a differentiator, not a lead theme

Sustainability is not a primary travel motive, but an increasingly relevant decision criterion, particularly among EXP and PS. Luxembourg should communicate sustainability as a transversal quality attribute — embedded within the strengths of nature, free public transport, short distances and "lesser-known sites" — rather than positioning it as a standalone theme. This reinforces existing strengths without overplaying a topic that is not yet a priority for the majority of travellers.



10

Annexes

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



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

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

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



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

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

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



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

¹ 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 PL: Destination Brand/Inspektour.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



Theme	General Interest									Luxembourg's Suitability perception								
	Past Visitors	Future Visitors¹	EXP	NLA	RS	SB	PS	LO	Total pop.	Past Visitors	Future Visitors¹	EXP	NLA	RS	SB	PS	LO	Total pop.
Culinary	4	1	1	2	1	1	6	2	1	1	3	3	1	2	1	5	1	1
Nature	2	2	2	1	3	3	1	3	2	4	6	7	2	8	6	7	3	7
Resting/Relaxation	5	5	8	7	2	2	5	1	3	7	9	9	7	5	4	12	4	8
City	1	4	4	5	4	5	3	7	4	5	2	2	3	1	2	1	2	2
Architecture/townscapes	3	3	3	3	6	4	2	6	5	2	1	1	7	3	5	1	4	3
Fun/entertainment	9	6	9	8	5	6	4	4	6	7	11	14	11	10	10	10	14	12
Family	10	10	12	18	7	12	12	5	7	12	10	11	16	12	13	17	7	10
Castles	6	8	7	10	8	8	15	8	8	6	5	4	3	7	8	4	7	5
History/Unesco	8	7	6	9	9	9	8	9	9	16	8	8	19	14	10	10	21	11
Culture	7	9	5	13	10	7	11	11	10	2	4	5	7	6	3	3	6	4
Events	13	11	10	15	16	10	10	10	11	13	14	18	16	19	16	13	14	17
Sustainability	11	12	11	16	11	13	14	12	12	21	13	14	16	21	24	20	13	20
Hiking	12	15	13	6	15	11	17	15	13	16	19	16	5	18	13	25	18	16
Nightlife	14	16	14	21	12	14	7	17	14	19	14	12	21	11	13	9	11	13
Adventure/action	16	13	15	14	14	17	13	13	15	23	17	23	19	20	25	20	20	21
Active-sports	15	19	18	4	17	15	16	16	16	10	21	18	5	17	12	15	14	15
Wellness	17	20	25	20	13	16	19	14	17	16	19	25	21	13	18	18	14	19
Wine	18	17	16	17	19	21	20	19	18	14	12	12	7	15	17	13	23	14
Countryside	21	18	21	11	21	19	23	18	19	15	25	21	11	23	26	23	19	23
Shopping	19	22	22	25	20	20	18	20	20	11	16	10	23	9	9	7	10	9
Cycling	23	23	19	12	23	18	25	23	21	19	22	17	11	16	20	20	12	18
Luxury	20	21	24	26	18	23	9	24	22	7	7	6	11	4	7	6	9	5
Remembrance	22	14	17	24	22	22	24	25	23	22	18	20	23	22	20	24	24	22
Camping	25	25	20	23	25	24	21	21	24	23	23	22	11	23	23	18	25	24
Industrial heritage	24	24	23	22	24	25	22	22	25	23	24	24	26	25	20	15	21	25
MTB	26	26	26	19	26	26	26	26	26	26	26	26	23	26	19	26	25	26

¹ 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 PL: Destination Brand/Inspektour.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



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

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

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



Theme	General Interest									Luxembourg's Suitability perception								
	Past Visitors	Future Visitors¹	EXP	NLA	RS	SB	PS	LO	Total pop.	Past Visitors	Future Visitors¹	EXP	NLA	RS	SB	PS	LO	Total pop.
Culinary	1	1	1	3	2	4	2	1	1	11	4	6	12	7	6	11	12	8
Nature	2	2	3	1	5	3	1	4	2	5	12	9	4	9	7	7	9	9
Resting/Relaxation	3	5	7	2	1	1	6	2	3	4	5	7	2	1	3	5	3	4
Architecture/townscapes	5	3	2	9	6	2	4	5	4	6	3	2	1	6	11	8	6	5
Family	4	4	5	7	3	5	5	3	5	3	1	3	11	2	1	3	2	2
Fun/entertainment	9	10	12	6	4	11	3	6	6	8	8	13	5	8	12	4	8	10
History/Unesco	7	6	4	10	10	6	9	7	7	14	13	11	9	14	14	18	10	13
Culture	8	8	6	11	11	8	12	9	8	9	9	5	3	10	8	13	13	7
Events	11	11	8	12	7	10	7	12	9	15	14	15	16	13	15	14	14	14
Sustainability	12	7	9	8	9	12	10	8	10	19	20	23	26	22	18	15	16	20
City	6	12	11	15	8	7	11	11	11	2	2	1	8	3	4	1	4	1
Castles	10	9	10	14	14	9	13	10	12	12	10	10	14	12	9	10	11	12
Hiking	15	15	14	4	17	13	15	13	13	13	15	14	15	18	13	24	24	15
Adventure/action	14	14	13	16	16	14	8	14	14	21	25	24	23	21	19	19	20	23
Nightlife	16	13	16	24	12	16	19	15	15	10	11	12	7	11	10	6	7	11
Remembrance	13	16	15	21	18	15	18	16	16	22	23	21	24	19	22	22	25	22
Shopping	18	17	21	19	13	18	25	17	17	7	6	8	10	4	2	9	5	6
Active-sports	19	20	19	5	19	21	14	21	18	20	16	22	19	17	21	12	17	18
Wine	17	19	17	18	20	20	16	20	19	17	21	20	25	16	16	21	18	19
Countryside	20	21	20	13	22	17	17	18	20	24	22	18	22	23	25	25	22	24
Industrial heritage	21	18	18	22	25	19	21	19	21	23	18	17	17	24	20	23	23	21
Wellness	22	22	23	20	15	23	20	24	22	18	18	19	18	15	23	16	21	17
Cycling	23	23	22	17	23	22	22	22	23	16	17	16	13	20	17	17	18	16
Camping	24	25	24	25	24	24	26	23	24	26	24	26	20	25	24	26	15	25
Luxury	25	24	25	26	21	25	24	26	25	1	7	4	6	5	5	2	1	3
MTB	26	26	26	23	26	26	23	25	26	25	26	25	21	26	26	20	26	26

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

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



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

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

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



Theme	General Interest									Luxembourg's Suitability perception								
	Past Visitors	Future Visitors ¹	EXP	NLA	RS	SB	PS	LO	Total pop.	Past Visitors	Future Visitors ¹	EXP	NLA	RS	SB	PS	LO	Total pop.
Culinary	1	1	3	4	2	7	2	2	1	8	8	8	15	9	9	10	10	8
Nature	3	6	4	2	3	3	3	3	2	4	6	5	6	5	3	2	4	4
History/Unesco	2	2	1	1	4	2	4	5	3	11	11	11	19	11	13	4	11	11
Architecture/townscapes	5	4	2	7	7	1	1	4	4	5	5	6	4	7	7	5	6	6
City	4	5	5	6	6	4	8	1	5	2	2	2	2	2	2	7	2	2
Castles	6	3	7	10	5	6	5	6	6	1	1	1	5	1	1	1	1	1
Culture	7	7	6	9	8	5	7	9	7	3	3	3	7	6	4	3	3	3
Resting/Relaxation	9	9	10	8	1	9	6	8	8	13	7	10	3	3	8	9	8	7
Gardens/parks	8	8	8	5	9	8	10	7	9	6	4	4	1	4	5	6	7	5
Hiking	11	12	9	3	12	10	9	12	10	9	9	7	8	13	6	8	15	10
Road trips, scenic drives	10	11	11	15	11	11	11	11	11	12	12	14	13	15	11	12	12	13
Family	13	13	13	16	10	12	14	10	12	7	10	12	12	8	12	11	5	9
Sustainability	12	10	12	11	15	13	12	13	13	15	17	17	14	19	18	15	18	18
Bathing (in lakes, waters)	15	17	14	13	14	14	16	15	14	28	27	27	29	27	27	25	28	27
Fun/entertainment	14	14	15	16	13	15	15	14	15	16	18	19	10	16	14	18	13	15
Events	16	15	16	20	16	16	13	17	16	14	13	13	9	18	15	16	9	14
Countryside	18	18	18	18	17	17	22	16	17	21	21	21	17	20	17	17	16	20
Nightlife	19	16	17	23	18	19	19	18	18	17	16	15	25	14	19	13	21	17
Wine	17	19	19	21	20	18	21	19	19	18	20	18	18	21	20	21	20	21
Adventure/action	20	23	20	14	24	24	17	21	20	27	25	26	21	26	28	22	26	26
Active-sports	21	22	21	12	22	21	18	23	21	23	24	23	23	23	23	23	24	23
Wellness	22	20	24	19	21	22	20	20	22	19	19	20	11	17	21	19	19	19
Shopping	23	21	23	28	19	20	23	22	23	20	15	16	20	12	16	20	17	16
Remembrance	25	25	22	25	23	23	26	25	24	22	22	22	22	24	25	24	22	22
Industrial heritage	24	24	25	26	26	25	24	24	25	24	23	24	24	25	22	28	23	24
Luxury	26	26	27	30	25	27	25	27	26	10	14	9	28	10	10	14	14	12
Camping/motorhome	27	27	26	22	28	26	29	26	27	25	26	25	27	22	26	26	27	25
Water sports	28	29	28	29	27	30	27	28	28	30	30	30	30	30	30	27	30	30
MTB	29	28	29	24	29	28	28	29	29	26	28	28	26	28	24	29	25	28
Cycling	30	30	30	27	30	29	30	30	30	29	29	29	15	29	29	30	29	29

¹ 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 PL: Destination Brand/Inspektour.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



Theme	General Interest									Luxembourg's Suitability perception								
	Past Visitors	Future Visitors¹	EXP	NLA	RS	SB	PS	LO	Total pop.	Past Visitors	Future Visitors¹	EXP	NLA	RS	SB	PS	LO	Total pop.
Culinary	4	1	4	1	2	4	2	1	1	8	6	5	7	8	9	6	9	8
City	1	2	1	9	3	1	1	2	2	1	1	1	4	2	1	2	1	1
Architecture/townscapes	2	3	3	7	5	3	4	5	3	3	8	3	11	6	7	8	6	5
Nature	5	5	7	2	4	5	5	4	4	2	3	6	1	7	5	3	8	6
Resting/Relaxation	6	9	10	3	1	2	3	3	5	7	5	10	3	1	10	1	2	4
History/Unesco	8	6	2	12	8	6	9	6	6	9	10	8	12	9	12	11	10	10
Culture	3	6	5	4	6	8	10	9	7	4	2	2	6	3	3	4	4	2
Castles	7	4	6	5	10	7	6	8	8	5	4	4	2	5	2	7	5	3
Family	9	8	9	10	7	11	7	7	9	6	9	9	23	4	4	5	3	7
Gardens/parks	10	10	8	8	9	9	13	10	10	11	7	7	13	10	8	10	7	9
Fun/entertainment	11	11	11	11	11	12	8	11	11	14	13	16	8	14	16	17	12	14
Bathing (in lakes, waters)	12	12	12	6	12	10	11	12	12	17	14	15	16	16	26	15	14	17
Sustainability	14	14	15	14	13	15	14	15	13	15	17	18	18	19	17	20	22	18
Road trips, scenic drives	15	15	14	15	14	13	19	13	14	18	16	14	24	15	14	27	15	16
Nightlife	13	13	13	19	15	14	12	14	15	13	12	13	5	17	13	12	11	12
Events	16	17	16	18	16	16	18	16	16	12	11	12	10	13	23	13	13	13
Hiking	18	18	17	13	17	18	22	17	17	23	26	23	9	22	19	28	21	22
Countryside	19	16	18	16	18	17	24	18	18	25	18	20	19	21	27	25	23	20
Wine	17	21	19	21	20	25	20	23	19	21	21	22	29	18	18	18	19	19
Shopping	22	22	22	24	19	19	23	19	20	16	19	17	27	12	11	14	16	15
Active-sports	20	20	20	17	22	22	17	20	21	19	20	19	15	25	24	16	24	21
Adventure/action	21	19	21	20	23	21	15	21	22	20	23	27	21	27	25	23	26	26
Wellness	23	23	26	23	21	20	21	25	23	22	24	26	17	20	15	19	28	24
Remembrance	25	25	23	28	25	23	27	22	24	26	22	21	28	23	20	24	17	22
Luxury	24	24	25	27	24	26	16	28	25	10	15	11	25	11	6	9	18	11
Industrial heritage	27	26	24	29	27	24	26	27	26	28	25	24	14	24	21	21	25	25
Camping/motorhome	28	27	27	22	26	27	28	24	27	27	27	25	30	26	22	29	20	27
Water sports	26	28	28	26	28	30	25	26	28	29	29	29	22	30	29	26	30	29
MTB	29	29	29	25	29	28	29	29	29	24	28	28	20	28	28	22	27	28
Cycling	30	30	30	30	30	29	30	30	30	30	30	30	26	29	30	30	29	30

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability

 — Past and Future Visitors



Theme	General Interest			Luxembourg's Suitability perception		
	Past Visitors	Future Visitors ¹	Total population	Past Visitors	Future Visitors ¹	Total population
Nature	1	4	2	9	8	8
Castles	2	3	3	2	2	2
City	3	1	1	1	1	1
Culture	4	6	6	3	3	3
Culinary	5	2	4	4	5	5
Family	6	8	7	7	7	7
Hiking	7	5	5	6	6	6
Shopping	8	7	8	5	4	4
Cycling	9	9	9	8	10	9
Active-sports	10	10	10	10	9	10

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability

  — Past and future visitors – LFT target segments – Total population



Theme	General Interest									Luxembourg's Suitability perception								
	Past Visitors	Future Visitors ¹	EXP	NLA	RS	SB	PS	LO	Total pop.	Past Visitors	Future Visitors ¹	EXP	NLA	RS	SB	PS	LO	Total pop.
Resting/Relaxation	1	1	3	4	1	1	3	1	1	3	3	6	3	3	5	4	3	3
Culinary	2	2	2	1	2	4	1	2	2	4	2	2	4	2	2	1	1	2
City	6	4	1	7	3	2	5	3	3	1	1	1	2	1	1	3	2	1
Nature	3	3	4	2	4	6	2	6	4	7	7	5	1	10	4	5	11	6
Family	4	9	10	15	6	3	4	4	5	8	8	10	8	7	9	8	7	8
Sustainability	5	5	8	5	5	8	7	5	6	18	9	12	9	13	17	16	13	13
Culture	7	7	6	13	9	7	10	7	7	9	4	3	7	5	6	9	4	4
History/Unesco	8	6	5	11	11	5	15	8	8	10	6	7	11	6	8	11	10	7
Castles	9	8	7	6	10	9	13	9	9	6	11	4	10	11	7	12	9	9
Nightlife	13	10	12	10	7	10	6	11	10	14	10	9	16	8	15	6	6	10
Shopping	14	11	17	20	8	13	12	10	11	2	5	8	13	4	3	2	5	5
Wine	10	12	11	12	13	12	14	13	12	5	14	13	5	12	10	13	8	11
Wellness	16	13	15	9	12	15	20	12	13	11	12	11	6	9	11	15	12	12
Countryside	11	14	9	14	14	11	18	14	14	13	17	16	12	15	18	7	14	14
Active-sports	12	16	14	8	15	14	8	15	15	12	13	14	19	14	14	14	16	15
Industrial heritage	17	17	16	17	17	16	19	16	16	15	15	17	17	16	20	10	17	16
Hiking	15	15	13	3	18	17	9	18	17	17	18	18	15	19	12	19	19	19
Camping	18	18	18	19	16	19	11	17	18	19	16	19	20	18	13	18	15	18
Cycling	19	19	19	16	19	18	16	19	19	16	19	15	18	17	16	17	18	17
MTB	20	20	20	18	20	20	17	20	20	20	20	20	14	20	19	20	19	20

¹ 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 PL: Destination Brand/Inspektour.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



Theme	General Interest									Luxembourg's Suitability perception								
	Past Visitors	Future Visitors ¹	EXP	NLA	RS	SB	PS	LO	Total pop.	Past Visitors	Future Visitors ¹	EXP	NLA	RS	SB	PS	LO	Total pop.
Resting/Relaxation	1	1	3	1	1	1	1	3	1	2	3	8	8	1	2	3	1	2
Culinary	3	2	2	5	2	3	2	1	2	3	2	2	12	4	3	2	3	3
Nature	2	5	4	2	3	2	3	2	3	8	5	5	7	9	5	14	4	6
Family	5	3	5	9	4	4	5	5	4	4	8	11	5	5	1	7	2	5
City	4	4	1	12	5	5	4	4	5	1	4	1	1	3	4	1	5	1
Culture	6	6	6	11	7	7	9	6	6	6	1	3	13	6	8	10	6	6
History/Unesco	7	7	7	7	8	6	12	7	7	9	7	9	9	8	14	9	10	9
Shopping	14	11	12	14	6	11	7	10	8	5	10	6	6	2	9	5	7	4
Castles	8	8	8	19	12	8	13	11	9	7	15	4	4	11	15	17	8	10
Sustainability	13	10	9	6	14	13	15	8	10	16	12	14	14	16	18	12	12	14
Wellness	10	15	15	10	9	15	6	9	11	12	11	18	17	10	12	8	13	12
Hiking	12	9	10	3	13	9	10	13	12	15	14	10	11	14	13	20	20	16
Nightlife	9	16	11	13	10	12	11	14	13	11	6	7	15	7	10	4	9	8
Countryside	11	14	14	4	16	10	14	12	14	14	13	16	20	18	6	11	15	15
Wine	15	13	13	20	15	17	8	16	15	10	9	15	10	12	7	6	14	11
Camping	16	17	18	16	11	14	16	15	16	19	16	20	19	15	16	19	16	18
Active-sports	17	12	16	8	17	16	17	17	17	18	18	12	18	13	19	15	18	17
Industrial heritage	18	18	17	15	18	18	20	18	18	13	17	13	2	17	17	13	11	13
Cycling	19	19	19	17	19	19	18	19	19	20	20	19	16	20	11	16	19	19
MTB	20	20	20	18	20	20	19	20	20	17	19	17	3	19	20	18	17	20

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg’s Theme Suitability



— Past and future visitors – LFT target segments – Total population



Theme	General Interest									Luxembourg’s Suitability perception								
	Past Visitors	Future Visitors¹	EXP	NLA	RS	SB	PS	LO	Total pop.	Past Visitors	Future Visitors¹	EXP	NLA	RS	SB	PS	LO	Total pop.
Resting/Relaxation	1	1	6	5	1	1	1	1	1	5	3	7	6	2	3	3	5	4
Culinary	2	2	2	2	2	2	2	2	2	1	1	2	3	1	1	1	1	1
Nature	3	4	1	1	3	3	5	4	3	14	11	7	11	11	13	11	8	11
City	5	3	5	8	4	5	6	5	4	2	2	1	3	2	11	2	1	2
Sustainability	4	5	8	3	6	4	8	6	5	13	17	14	16	14	7	5	14	13
Family	7	6	9	11	5	7	4	3	6	4	4	10	6	5	2	5	4	6
History/Unesco	6	7	3	6	7	8	12	8	7	10	6	5	16	10	6	5	5	9
Culture	10	9	4	10	8	11	9	11	8	6	7	2	6	6	7	15	5	5
Castles	9	10	7	13	12	9	14	10	9	9	8	9	1	6	12	9	8	8
Countryside	12	12	10	12	9	6	18	12	10	8	13	10	11	11	17	14	10	12
Shopping	14	11	15	19	11	13	11	7	11	3	5	5	3	4	3	4	3	3
Wine	8	13	12	16	10	12	15	13	12	12	10	10	10	8	14	9	11	10
Nightlife	11	8	13	18	13	14	3	9	13	7	9	4	1	8	7	15	11	7
Hiking	13	15	11	4	14	15	13	16	14	15	16	13	11	16	10	18	16	15
Wellness	16	16	17	15	15	17	10	14	15	11	15	16	9	17	5	8	11	14
Active-sports	17	17	18	7	17	18	7	17	16	16	14	18	20	13	14	13	15	16
Camping	15	18	16	14	16	10	16	15	17	17	12	15	15	15	14	17	17	17
Industrial heritage	18	14	14	17	18	16	17	18	18	18	18	19	11	19	17	11	18	18
Cycling	19	19	19	9	19	19	20	19	19	20	19	16	19	20	20	20	18	19
MTB	20	20	20	20	20	20	19	20	20	19	20	20	18	17	19	18	18	20

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Ranking General Theme Interest vs. Luxembourg's Theme Suitability



— Past and future visitors – LFT target segments – Total population



Theme	General Interest									Luxembourg's Suitability perception								
	Past Visitors	Future Visitors ¹	EXP	NLA	RS	SB	PS	LO	Total pop.	Past Visitors	Future Visitors ¹	EXP	NLA	RS	SB	PS	LO	Total pop.
Culinary	4	1	1	9	4	2	5	2	1	5	4	3	4	5	7	4	5	4
Resting/Relaxation	1	5	6	3	1	3	1	3	2	2	2	5	3	1	2	2	2	2
Family	2	6	4	7	3	1	3	1	3	1	1	2	2	2	1	1	1	1
Nature	5	2	2	1	2	4	2	5	4	6	6	6	1	6	6	7	4	7
Culture	3	3	3	10	7	6	7	4	5	4	3	1	5	4	5	3	3	3
Wellness	7	9	10	8	5	5	4	7	6	7	8	9	7	3	3	5	8	5
History/Unesco	6	8	5	11	8	9	11	6	7	3	5	4	11	7	8	8	7	6
Sustainability	9	4	8	4	6	7	6	8	8	10	10	10	8	9	9	9	13	10
City	11	7	9	13	9	8	8	9	9	8	7	8	17	8	4	6	6	8
Castles	8	10	7	2	10	10	9	10	10	9	9	7	6	10	10	10	9	9
Countryside	12	12	13	6	12	11	13	12	11	15	14	15	9	15	16	12	12	14
Hiking	13	11	12	5	11	12	12	11	12	13	12	12	10	13	18	11	11	12
Nightlife	10	13	11	18	13	13	10	13	13	11	11	11	15	12	13	14	10	11
Wine	14	14	14	16	16	14	14	14	14	14	15	13	13	14	15	16	16	15
Shopping	17	15	16	17	14	18	16	15	15	12	13	14	19	11	11	13	15	13
Active-sports	16	17	17	12	15	16	15	17	16	17	17	18	12	17	12	15	17	18
Industrial heritage	15	16	15	14	17	15	18	16	17	16	16	16	14	18	14	18	14	16
Camping	18	18	18	19	18	17	17	18	18	18	17	17	16	16	17	17	18	17
MTB	19	19	19	15	19	20	19	20	19	20	19	19	18	19	19	19	19	19
Cycling	20	20	20	20	20	19	20	19	20	19	20	20	20	20	20	20	20	20

¹ Respondents willing to travel to Luxembourg within the next 3 years and without previous visiting experience.

Luxembourg's Brand Features Ratings – Source Markets



	Affordable	Attractive	Authentic	Clean	Exclusive, luxurious	Lively, trendy	Modern, dynamic	Not overcrowded, insider tip	Of high quality	Open-minded, tolerant	Safe	Service oriented
Travel intent Lux: high/very high												
Portugal		58%	61%		43%	40%	57%	41%	65%	60%	71%	49%
Ireland		53%	51%		48%	44%	41%	35%	55%	49%	54%	41%
United Kingdom	26%	54%	52%	58%	41%	33%	34%	29%	52%	45%	54%	30%
Germany	22%	42%	46%	51%	36%	30%	41%	27%	52%	52%	57%	38%
All countries	25%	45%	46%	53%	38%	32%	37%	29%	50%	44%	53%	35%
Austria	17%	42%	47%	49%	41%	33%	38%	28%	54%	47%	54%	35%
Denmark		44%	46%		42%	36%	39%	28%	46%	48%	44%	39%
Sweden		43%	40%		43%	33%	35%	30%	48%	35%	48%	38%
Italy	27%	37%	42%	54%	38%	26%	37%	31%	49%	45%	51%	36%
Switzerland	27%	40%	43%	51%	41%	34%	36%	27%	52%	42%	49%	34%
Spain	21%	47%	41%	50%	36%	32%	36%	28%	50%	40%	51%	28%
Belgium	30%	43%	45%	62%	27%	22%	27%	27%	45%	35%	56%	29%
France	25%	38%	41%	55%	38%	30%	39%	21%	45%	42%	46%	26%
Netherlands	30%	48%	42%	48%	25%	24%	25%	24%	42%	36%	57%	36%
Past visits (ovn)												
Portugal		60%	63%		42%	39%	62%	43%	67%	68%	81%	59%
Ireland		45%	42%		46%	35%	35%	39%	50%	44%	49%	33%
Germany	24%	42%	43%	53%	38%	31%	39%	29%	52%	53%	59%	40%
Austria	22%	44%	39%	53%	41%	33%	41%	35%	54%	47%	52%	35%
All countries	24%	41%	41%	52%	36%	30%	35%	29%	46%	42%	51%	34%
Spain	22%	40%	40%	50%	37%	32%	37%	29%	47%	42%	52%	29%
Switzerland	30%	44%	40%	49%	37%	38%	31%	32%	45%	39%	44%	33%
Denmark		39%	43%		39%	34%	37%	27%	41%	45%	39%	36%
Italy	26%	33%	38%	52%	37%	26%	34%	29%	44%	39%	49%	34%
United Kingdom	25%	45%	41%	55%	35%	25%	26%	27%	44%	42%	55%	23%
France	21%	33%	40%	56%	38%	30%	39%	21%	44%	40%	48%	25%
Sweden		34%	32%		36%	30%	33%	25%	37%	32%	40%	34%
Belgium	26%	37%	40%	55%	23%	19%	23%	24%	36%	30%	50%	26%
Netherlands	25%	36%	36%	45%	18%	21%	18%	20%	36%	29%	51%	31%
Total												
Portugal		50%	55%		38%	34%	51%	36%	60%	55%	68%	45%
Ireland		40%	37%		37%	32%	31%	26%	42%	36%	41%	28%
Denmark		36%	39%		37%	30%	32%	24%	40%	40%	40%	32%
Spain	16%	38%	34%	45%	32%	26%	29%	25%	42%	34%	47%	22%
All countries	17%	32%	34%	42%	30%	23%	27%	22%	38%	33%	44%	25%
Italy	19%	26%	30%	46%	31%	20%	28%	25%	37%	33%	42%	27%
Germany	14%	27%	31%	38%	27%	19%	27%	19%	36%	37%	44%	25%
Sweden		29%	27%		32%	24%	24%	21%	34%	24%	35%	26%
Austria	10%	25%	30%	37%	31%	20%	25%	20%	39%	32%	42%	22%
United Kingdom	17%	34%	34%	41%	26%	21%	20%	21%	34%	28%	40%	17%
Netherlands	22%	29%	31%	40%	19%	17%	17%	18%	30%	26%	49%	25%
France	17%	25%	29%	44%	29%	21%	27%	17%	33%	31%	37%	18%
Switzerland	15%	25%	30%	41%	28%	20%	23%	18%	36%	30%	43%	21%
Belgium	21%	28%	34%	45%	21%	15%	18%	20%	31%	24%	42%	20%

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

Luxembourg's Brand Features Ratings – Ranking by Source Markets

Past and future visitors



																																								
	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot	PV	FTI	Tot				
safe	3	1	1	2	2	2	6	5	3	2	2	2	1	1	1	2	6	2	2	2	2	1	1	1	1	3	1	1	3	1	2	3	1	4	2	1	1	5	2	
clean	2	4	3	1	1	1				1	1	1	4	2	2				1	1	1	2	3	2				2	4	2				1	1	2	2	1	1	
high quality	1	2	2	6	4	5	3	1	1	3	3	3	5	3	5	1	2	1	3	3	3	5	7	5	4	2	2	3	2	3	3	2	3	2	3	5	3	4		
welcoming	4	3	4	3	5	3	4	3	5	4	7	5	2	4	3	3	1	4	4	5	5	3	2	3	2	1	3	5	8	9	1	1	2	7	6	6	3	6	6	
authentic	9	4	7	4	3	4	2	2	4	5	5	6	6	6	6	7	4	6	6	6	7	6	5	4	5	4	5	6	5	6	9	7	6	5	5	5	7	4	3	
open-minded	5	7	5	7	9	7	1	6	2	6	4	4	3	5	4	6	5	7	5	4	4	9	8	7	3	7	4	4	7	5	8	14	10	6	4	4	6	8	7	
attractive	6	8	8	5	6	6	5	4	7	10	6	9	7	7	9	5	3	3	11	7	11	4	4	6	7	5	7	7	1	4	5	4	5	3	9	8	4	2	5	
exclusive	7	8	6	13	10	11	7	7	6	8	10	7	11	10	8	4	9	5	7	9	6	15	10	12	13	12	12	10	11	7	4	5	4	9	7	7	8	7	8	
dynamic	7	10	10	14	12	14	8	10	8	7	8	8	9	8	7	11	12	9	9	11	8	14	13	15	6	6	6	9	9	10	7	11	8	13	8	9	10	11	13	
service-or.	11	13	11	10	13	12	9	9	9	12	15	13	8	11	10	13	10	11	10	12	10	7	9	9	8	11	9	14	15	16	6	6	7	10	12	10	16	14	16	
surprising	15	12	14	8	7	8	10	8	10	13	11	12	13	12	12	12	13	12	13	10	14	8	6	8	9	8	8	8	8	6	8	12	12	9	11	11	12	11	9	9
varied	10	6	9	9	8	8	12	12	12	9	9	10	10	9	11	8	7	10	12	13	15	10	11	11	10	9	10	13	10	12	10	10	12	14	10	11	14	10	12	
lively, trendy	13	11	12	16	16	16	11	11	11	11	12	11	12	13	13	10	8	8	15	15	16	12	15	14	14	13	14	12	12	13	11	9	11	8	13	13	12	13	10	
not overcrow.	11	15	13	12	15	13	13	14	13	15	16	15	14	14	14	9	14	13	14	14	13	13	16	13	12	14	13	15	14	15	14	8	13	12	15	14	9	15	11	
sustainable	14	14	15	15	14	15	14	13	14	14	14	16	15	15	15	14	11	14	8	8	9	16	14	16	11	10	11	11	13	14	13	13	14	16	14	15	15	12	14	
affordable	16	16	16	11	11	10				16	13	14	16	16	16				16	16	17	11	12	10				16	16	17				15	16	16	13	16	15	
unique																				12									11											

PV = Past Visitors to Luxembourg, FTI = future travel intent to Luxembourg, Tot = total population.

Source: LFT Brand & Potential Studies 2023-2024, except data for PL:

Destination Brand/Inspektour.

Preferred sources of travel inspiration - Ranking by Source Markets																							
																							
	FTI	Tot	FTI	Tot	FTI	Tot	FTI	Tot	FTI	Tot	FTI	Tot	FTI	Tot	FTI	Tot	FTI	Tot	FTI	Tot	FTI	Tot	
Recommendation friends, family	1	1	2	3	3	1	1	1	1	1	2	2	3	3	1	1	2	2	1	1	3	2	
Online search engine	2	2	1	1	4	3	2	2	2	2	1	1	1	1	2	2	1	1	2	2	1	1	
Social media	5	5	4	4	1	2	4	4	3	5	3	4	4	5	3	4	3	3	4	5	4	4	
Online booking engines, travel portals, holiday review sites	3	3	5	5	2	4	5	6	4	3	4	3	5	4	6	6	5	5	3	3	2	3	
DMO or accommodation websites	4	4	3	2	5	5	3	3	5	4	5	5	2	2	4	3	4	4	5	4	5	5	
Travel agency	6	6	6	6	6	6	7	8	7	7	6	6	6	7	5	5	6	6	10	6	6	6	
TV, radio, cinema	9	7	9	8	7	9	6	5	8	6	7	7	11	10	7	7	8	9	6	8	11	10	
Guide books or other books	8	8	7	7	10	10	8	7	6	8	9	9	8	6	8	8	10	10	7	9	7	9	
Newspapers, magazines	7	9	10	10	9	8	9	9	9	9	10	10	10	9	11	11	9	7	9	7	10	8	
Advertisements	10	10	8	9	8	7	10	11	11	11	8	8	7	8	9	9	7	8	11	11	9	7	
Films, serials (Netflix etc.)	11	11	11	11			11	10	10	10			9	11					8	10	8	11	
Travel fairs	12	12	12	12	11	11	12	12	12	12	11	11	12	12	10	10	11	11	13	13	12	12	
Artificial intelligence	13	13					13	13	13	13									12	12	13	13	
Instagram	1	1	1	1			1	1	2	1			1	1					1	1	1	1	
Youtube	3	2	2	4			2	3	1	2			3	4					2	2	2	3	
Facebook	2	3	3	3			4	4	3	3			4	3					4	4	3	2	
TikTok	4	4	4	2			3	2	4	4			2	2					3	3	4	4	
Pinterest	5	5	5	5			5	5	5	5			5	5					5	5	5	5	
Snapchat	6	6	6	6			6	6	6	6			6	6					6	6	6	6	
FTI = future travel intent to Luxembourg, Tot = total population.																Source: LFT Brand & Potential Studies 2023-2024, except data for PL: Destination Brand/Inspektour.							

Preferred type of content for travel inspiration - Ranking by Source Markets



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

FTI = future travel intent to Luxembourg, Tot = total population.

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

Travel party during most recent outbound holiday trip



— Average **13 European source markets**



	Austria	Belgium	Denmark	France	Germany	Ireland	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	United Kingdom
Couple													
Travel intent Lux: high/very high	44%	42%		45%	45%		47%	41%		50%		41%	41%
Total	42%	36%	28%	40%	38%	36%	44%	38%	35%	49%	32%	40%	39%
Family													
Total	34%	40%	50%	37%	33%	42%	27%	36%	46%	31%	44%	32%	38%
Travel intent Lux: high/very high	29%	38%		40%	32%		27%	35%		32%		35%	36%
Friends													
Total	14%	14%	10%	13%	13%	13%	16%	16%	10%	11%	12%	13%	11%
Travel intent Lux: high/very high	14%	11%		7%	12%		14%	14%		10%		7%	10%
Alone													
Travel intent Lux: high/very high	11%	8%		7%	11%		10%	7%		6%		16%	13%
Total	9%	8%	10%	8%	13%	8%	10%	7%	7%	8%	11%	13%	10%
Group													
Total	1%	2%	1%	2%	3%	1%	3%	2%	2%	1%	1%	1%	1%
Travel intent Lux: high/very high	1%	2%		2%	2%		2%	3%		1%		1%	1%

Quality orientation – Mode of organisation – Destination type

 — Average 9 European source markets*



	Austria	Belgium	France	Germany	Italy	Netherlands	Spain	Switzerland	United Kingdom
☐ Quality-oriented									
Travel intent Lux: high/very high	51%	51%	58%	58%	50%	54%	58%	67%	53%
Total	49%	48%	54%	53%	43%	47%	53%	60%	45%

	Austria	Belgium	France	Germany	Italy	Netherlands	Spain	Switzerland	United Kingdom
☐ Organised myself									
Travel intent Lux: high/very high	75%	75%	73%	71%	71%	75%	69%	79%	71%
Total	74%	72%	69%	67%	73%	69%	70%	76%	67%
☐ Organised via travel agency									
Total	26%	28%	31%	33%	27%	31%	30%	24%	33%
Travel intent Lux: high/very high	25%	25%	27%	29%	29%	25%	31%	21%	29%

	Austria	Belgium	France	Germany	Italy	Netherlands	Spain	Switzerland	United Kingdom
☐ New destination									
Travel intent Lux: high/very high	70%	72%	81%	73%	88%	78%	89%	79%	72%
Total	67%	67%	73%	67%	84%	73%	85%	70%	63%

* DE-FR-BE-NL-UK-CH-AT-ES-IT

Decision steps

— Average 9 European source markets*



	Austria	Belgium	France	Germany	Italy	Netherlands	Spain	Switzerland	United Kingdom
Destination (decision steps)									
Travel intent Lux: high/very high	43%	50%	53%	47%	47%	46%	52%	45%	49%
Total	43%	50%	46%	45%	46%	44%	53%	42%	49%
Holiday type (decision steps)									
Travel intent Lux: high/very high	24%	18%	13%	18%	25%	20%	15%	20%	20%
Total	21%	17%	15%	17%	24%	22%	16%	19%	20%
Landscape type (decision steps)									
Travel intent Lux: high/very high	19%	16%	16%	24%	13%	16%	15%	23%	16%
Total	20%	14%	16%	22%	13%	17%	15%	21%	16%
Accommodation (decision steps)									
Total	9%	9%	10%	10%	7%	11%	10%	10%	7%
Travel intent Lux: high/very high	8%	7%	8%	7%	7%	12%	10%	7%	6%
Transportation (decision steps)									
Total	7%	10%	11%	6%	9%	6%	7%	8%	7%
Travel intent Lux: high/very high	5%	10%	10%	4%	9%	6%	8%	5%	9%

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, theme interest groups and further demand indicators are presented on this and the following pages.

* DE-FR-BE-NL-UK-CH-AT-ES-IT



Sustainability vs. prices

— Average 9 European source markets*

	Austria	Belgium	France	Germany	Italy	Netherlands	Spain	Switzerland	United Kingdom	↑	↓
☐ Better prices of sustainable offers											
Travel intent Lux: high/very high	53%	58%	62%	51%	53%	55%	50%	51%	53%		
Total	51%	56%	54%	50%	54%	50%	47%	47%	55%		
☐ Sustainable offers that are more compatible with my holiday wishes											
Travel intent Lux: high/very high	38%	37%	36%	40%	42%	37%	45%	43%	41%		
Total	36%	33%	34%	37%	39%	35%	40%	39%	34%		
☐ Better and easier to find information on sustainable offers											
Travel intent Lux: high/very high	37%	31%	31%	40%	35%	34%	40%	41%	42%		
Total	35%	27%	28%	37%	32%	29%	37%	35%	37%		
☐ Higher quality sustainable offers and experiences											
Travel intent Lux: high/very high	33%	31%	34%	42%	34%	26%	43%	44%	40%		
Total	30%	26%	31%	36%	29%	24%	38%	37%	31%		
☐ If benefits and advantages of sustainable offers were more recognisable											
Travel intent Lux: high/very high	35%	29%	28%	40%	33%	36%	38%	38%	37%		
Total	33%	27%	27%	35%	31%	30%	36%	35%	34%		
☐ Better convenience to organise / book sustainable offers											
Travel intent Lux: high/very high	31%	28%	33%	35%	39%	28%	39%	36%	31%		
Total	30%	27%	29%	31%	35%	24%	36%	33%	28%		
☐ I am generally not interested in sustainable travel											
Total	8%	10%	9%	7%	5%	12%	8%	7%	9%		
Travel intent Lux: high/very high	5%	6%	4%	4%	3%	10%	5%	4%	7%		

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

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

* DE-FR-BE-NL-UK-CH-AT-ES-IT



YOUR CONTACT



Alain Krier

Head of Insights & Strategy

Luxembourg for Tourism GIE

6, rue Antoine de Saint-Exupéry

L-1432 Luxembourg-Kirchberg

T. +352 42 82 82 36

alain.krier@lft.lu

www.visitluxembourg.com