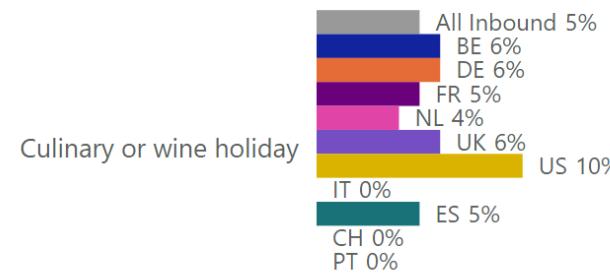


Luxembourg for Tourism
Theme profile
CULINARY & WINE

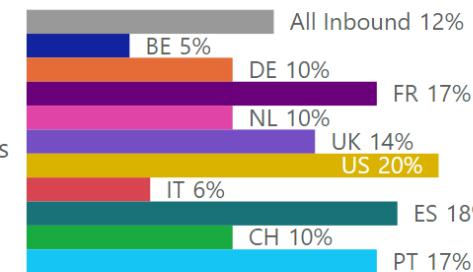
2024



Market size of Culinary & Wine segments

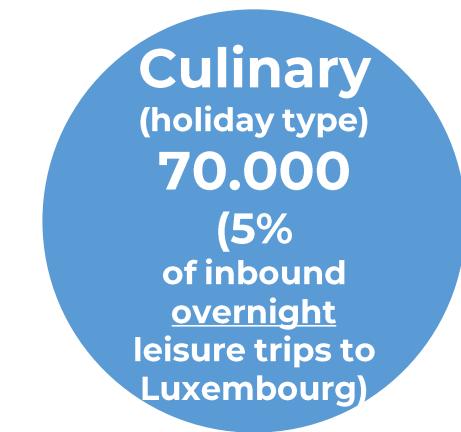


Wine tasting and oenological experiences



0% 10% 20%

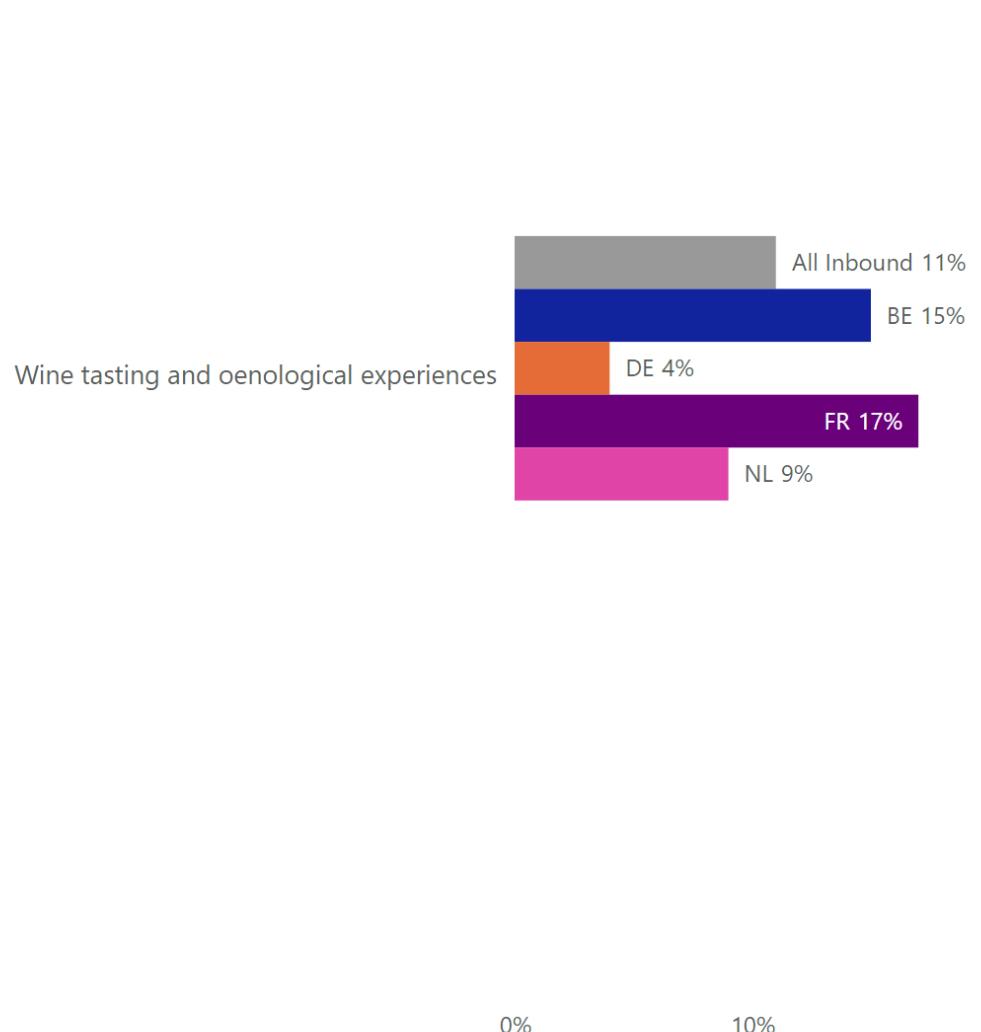
Number of overnight leisure trips to Luxembourg (estimate, yearly average 2023/2024)



- The U.S. shows the highest share in both culinary or wine holidays as well as wine experiences.

Same-day visitors

N.b. The segment of same-day visitors with Culinary as an excursion type is very small. For reasons of data representativeness, it has therefore been omitted from the present report.



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



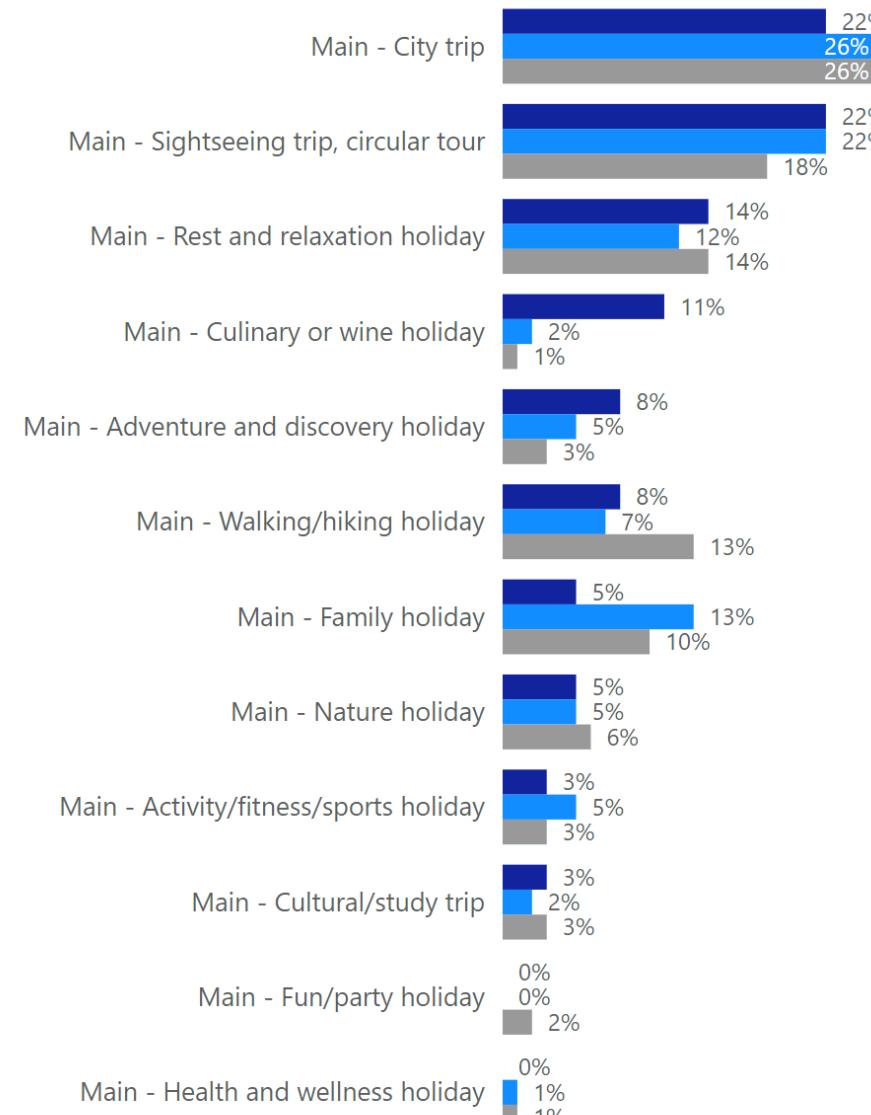


Travel behaviour of leisure visitors in Luxembourg with Culinary as a holiday and Wine as a holiday activity

Main holiday types

Visitors with overnight

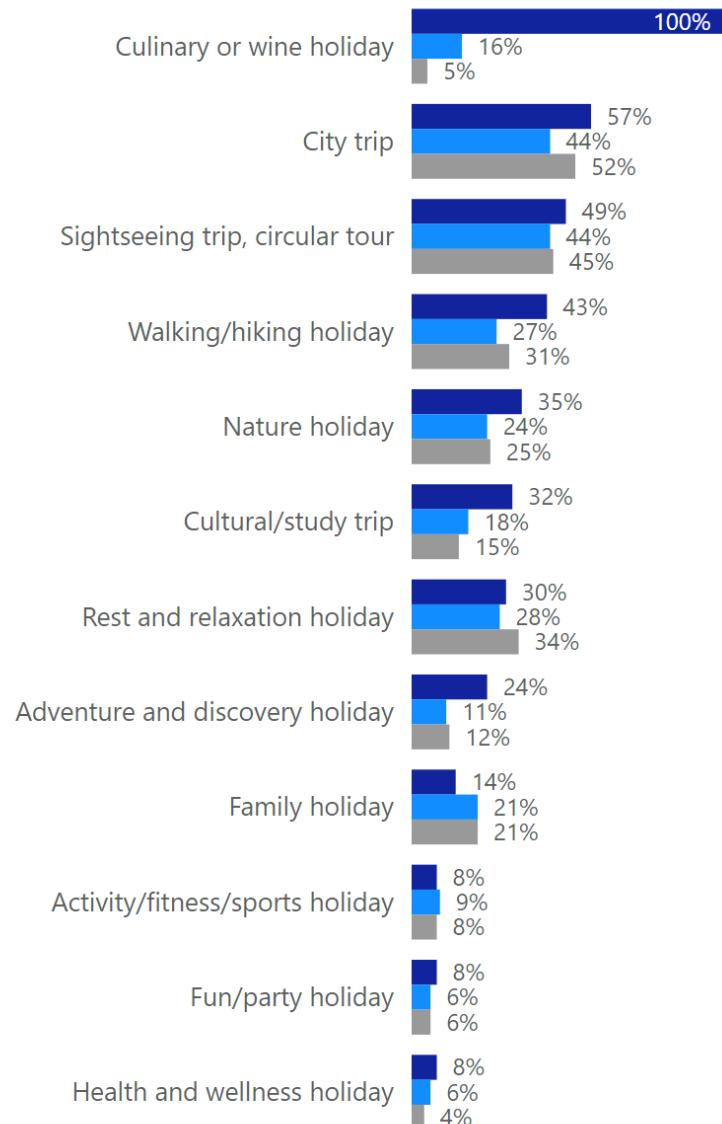
● Culinary (holiday type) ● Wine (activity) ● All Inbound



All holiday types

Visitors with overnight

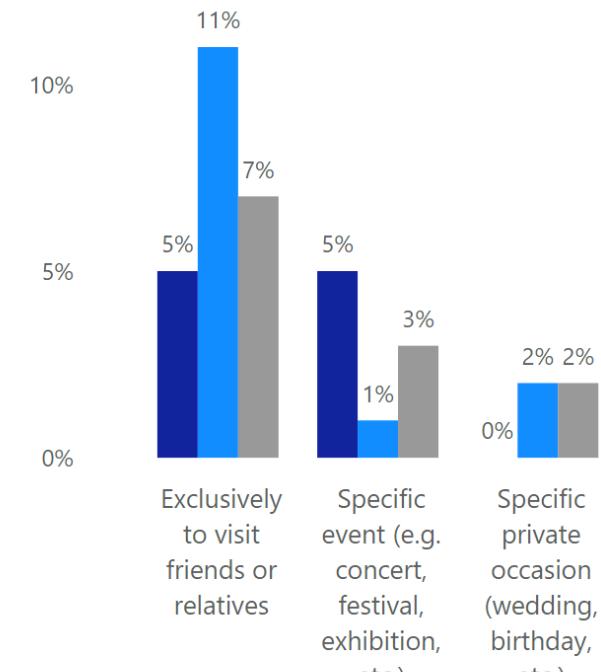
● Culinary (holiday type) ● Wine (activity) ● All Inbound



- Culinary holidays are more often paired with city trips as well as walking/hiking, nature and cultural holidays. They are less frequently combined with family holidays.

Main purpose of overnight trip (if not holiday)

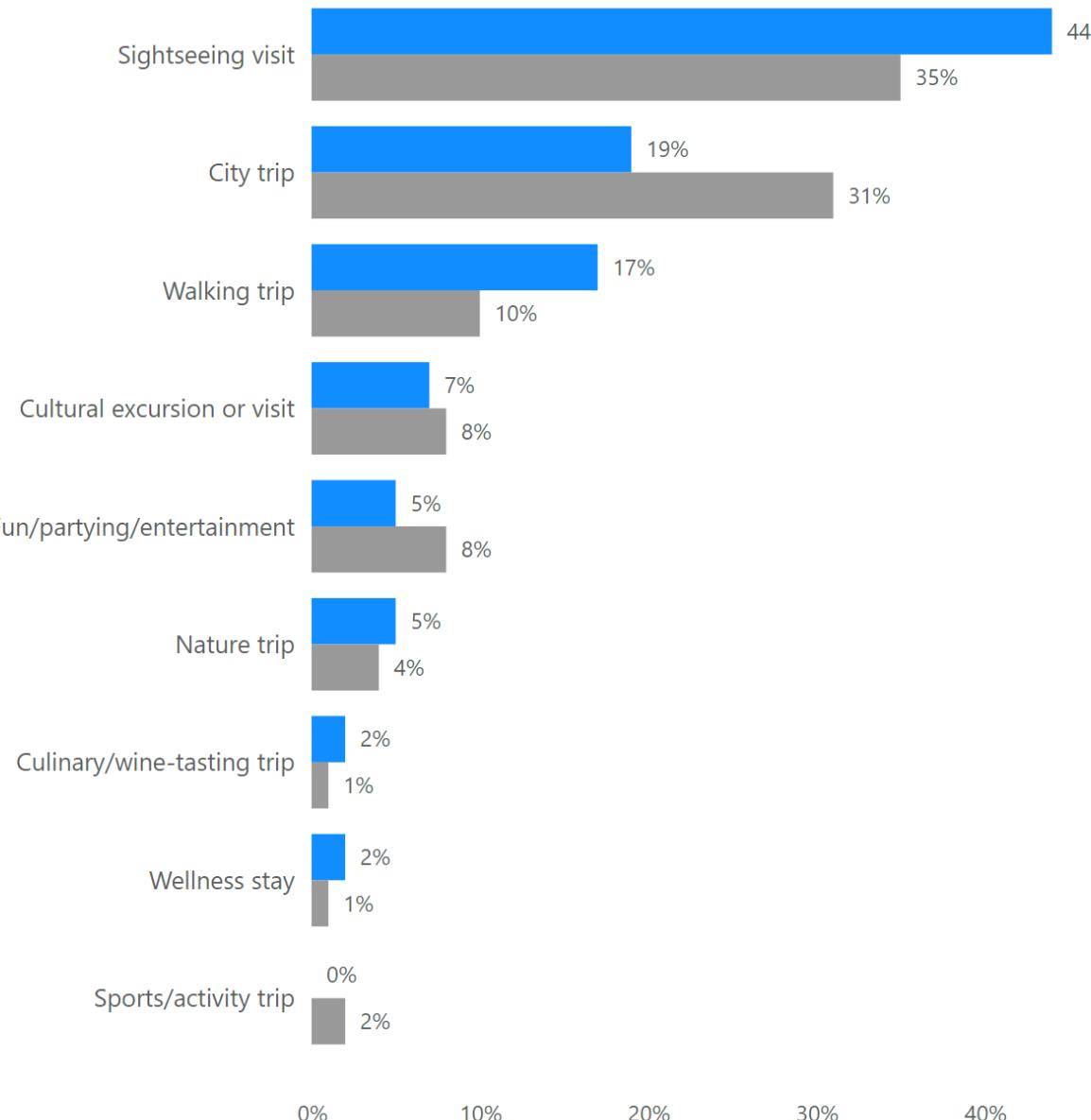
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Type of excursion

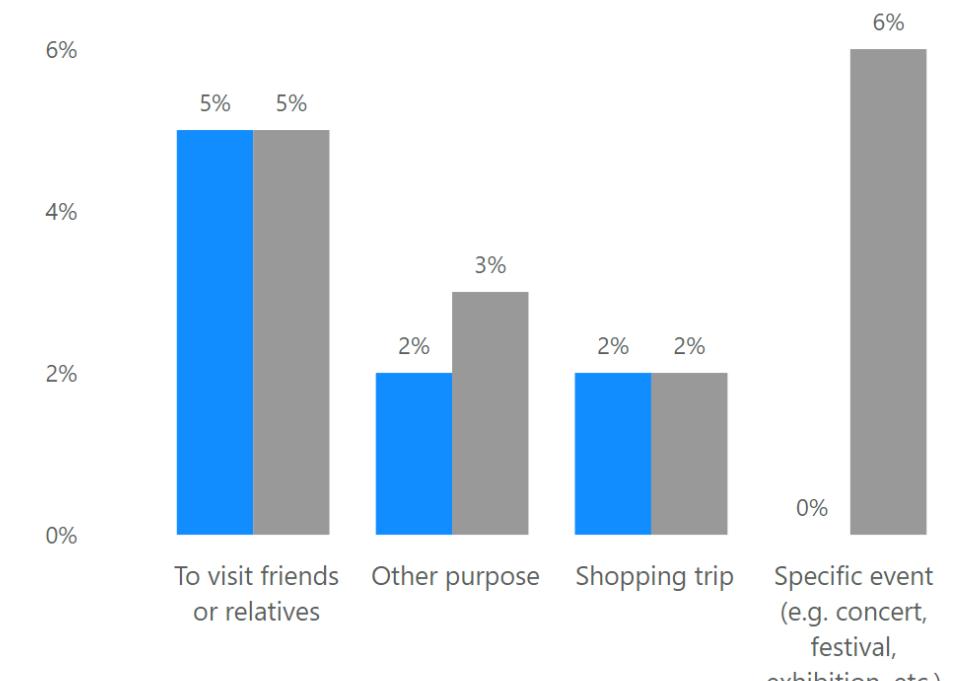
Same-day visitors

● Wine (activity) ● All Inbound



Main purpose of excursion (if not day trip)

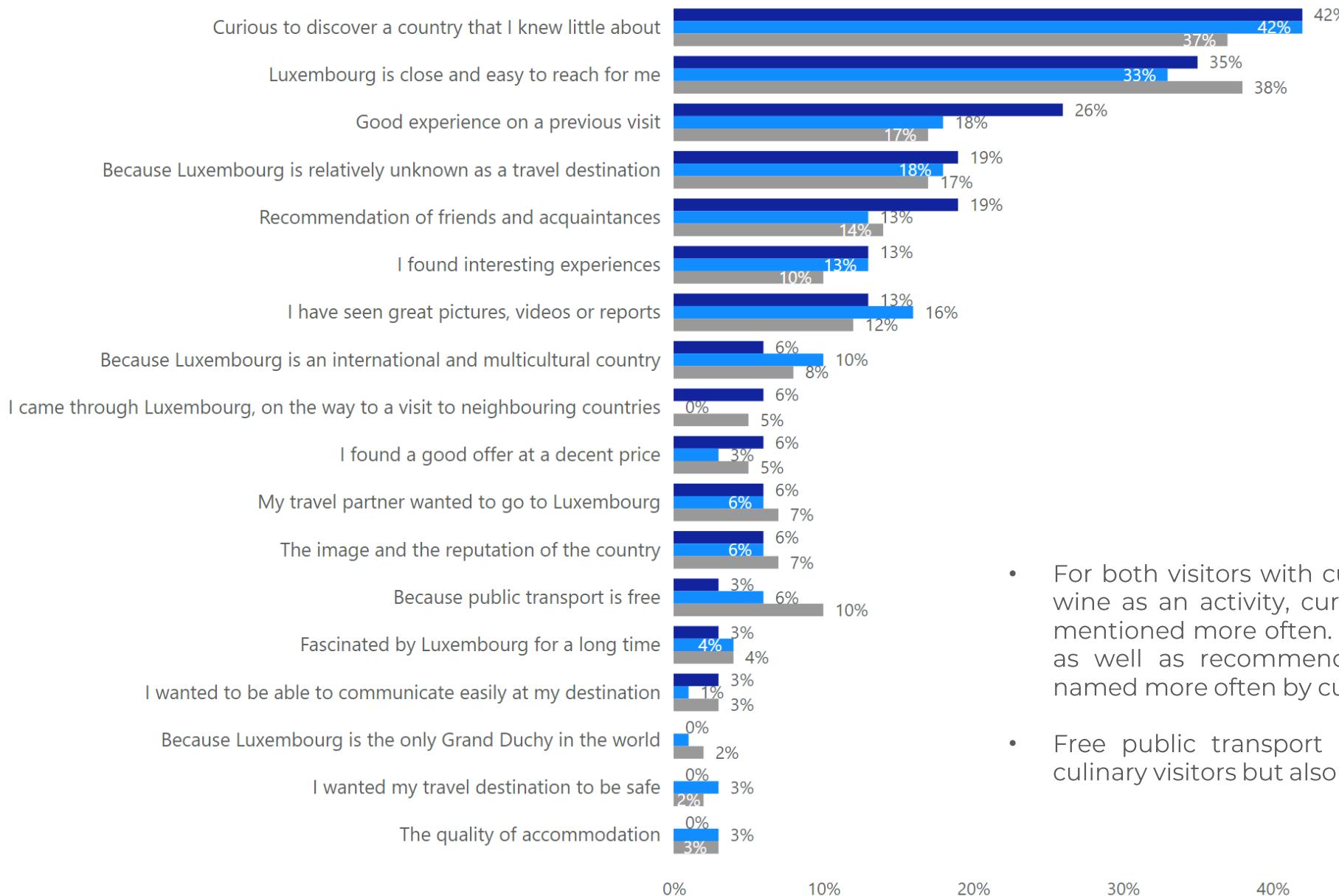
● Wine (activity) ● All Inbound



Reasons for choosing Luxembourg

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

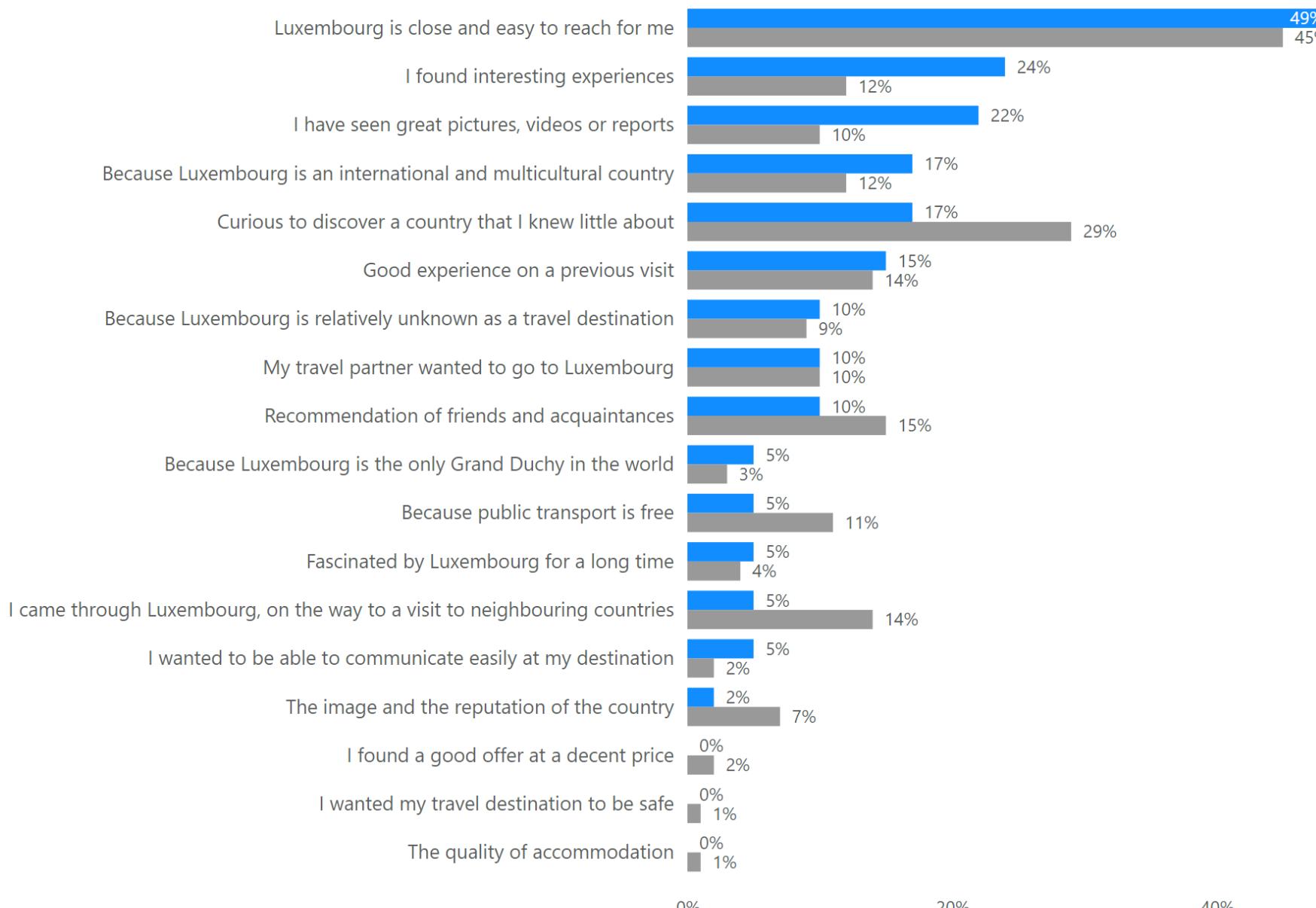


- For both visitors with culinary holiday type as well as with wine as an activity, curiosity to discover a new country is mentioned more often. Good experience on a previous visit as well as recommendations of friends are additionally named more often by culinary visitors.
- Free public transport is less of a reason, especially for culinary visitors but also for visitors with wine activities.

Reasons for choosing Luxembourg

Same-day visitors

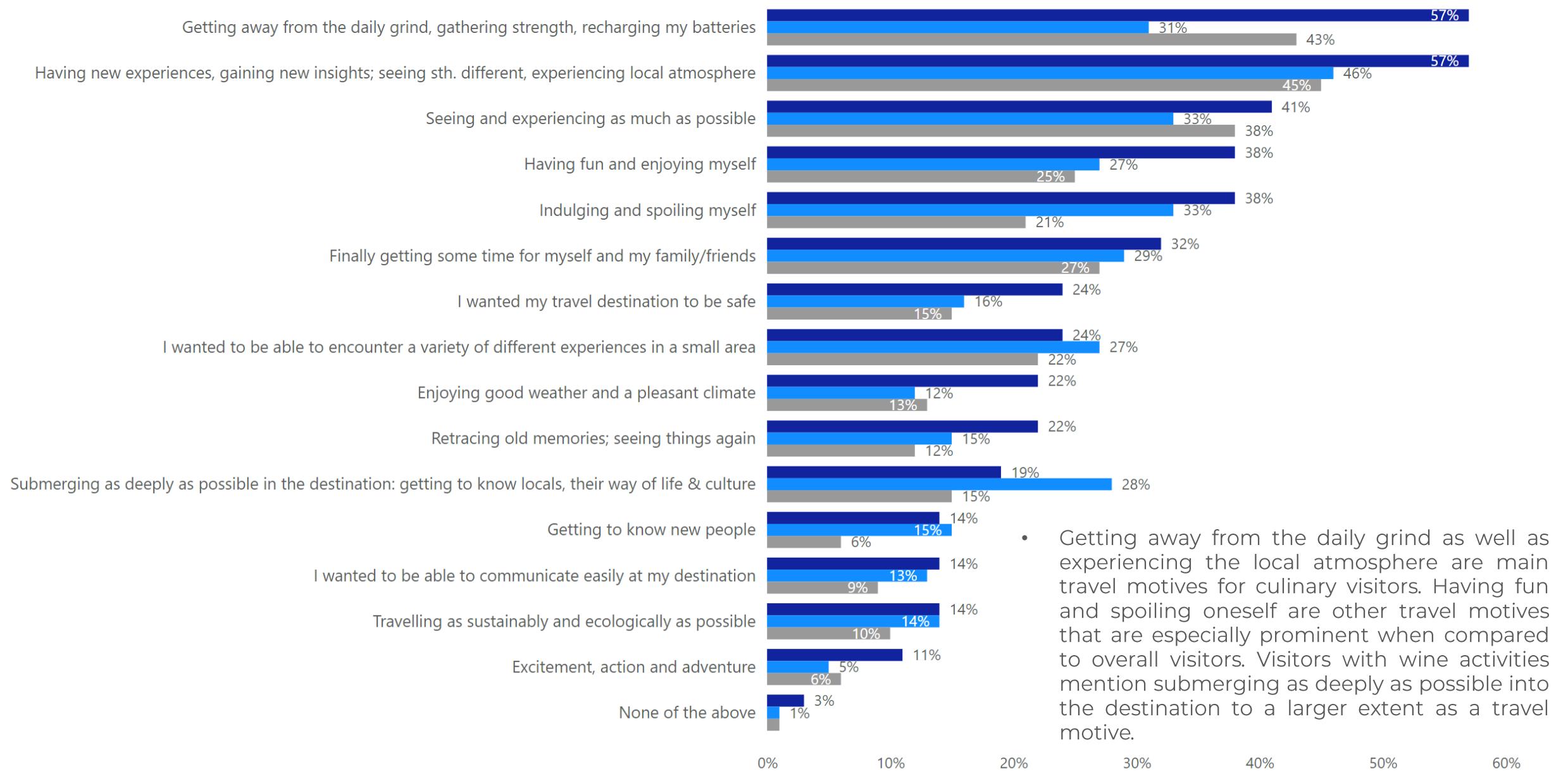
● Wine (activity) ● All Inbound



Travel motives

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

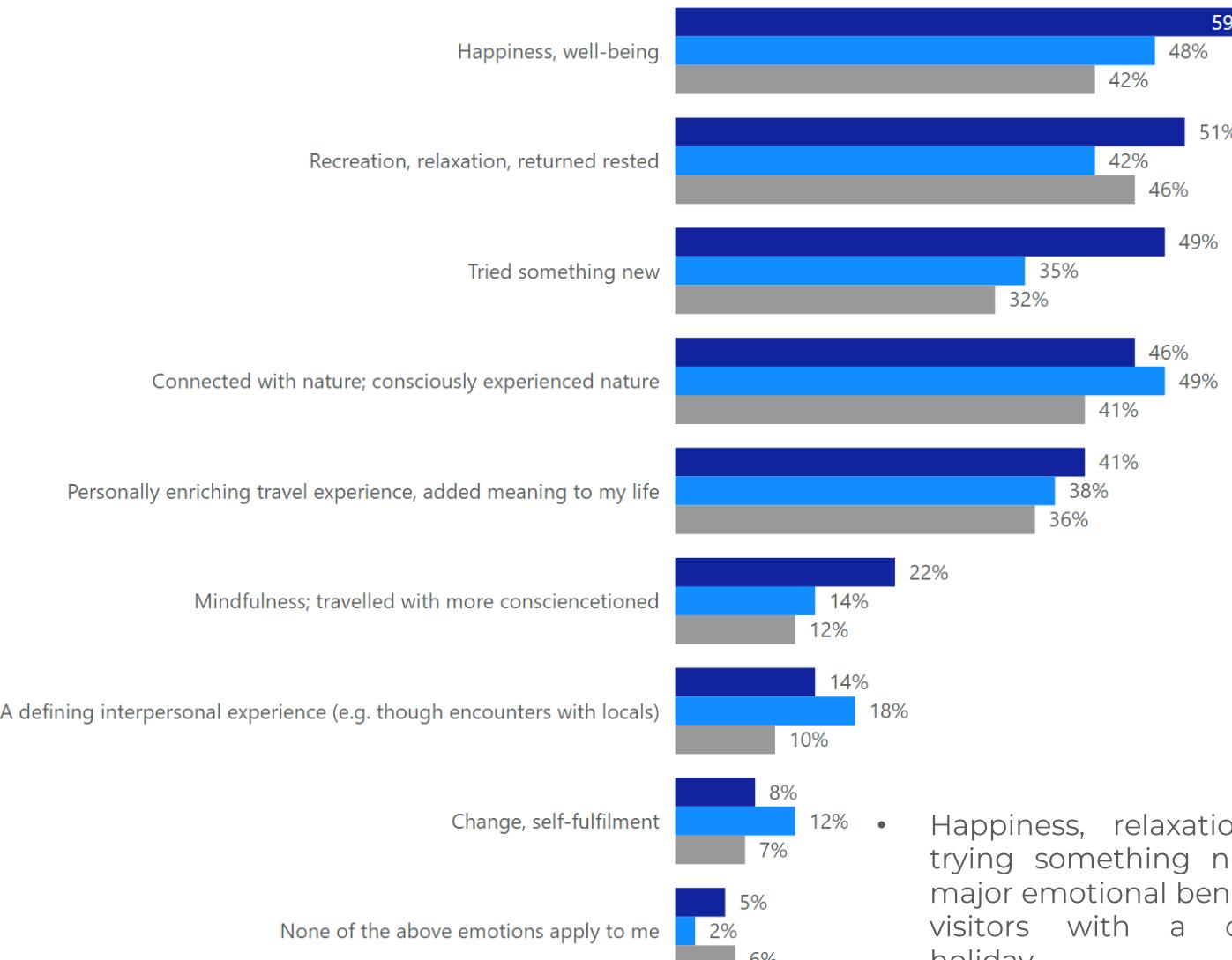


- Getting away from the daily grind as well as experiencing the local atmosphere are main travel motives for culinary visitors. Having fun and spoiling oneself are other travel motives that are especially prominent when compared to overall visitors. Visitors with wine activities mention submerging as deeply as possible into the destination to a larger extent as a travel motive.

Emotional benefits experienced during stay

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

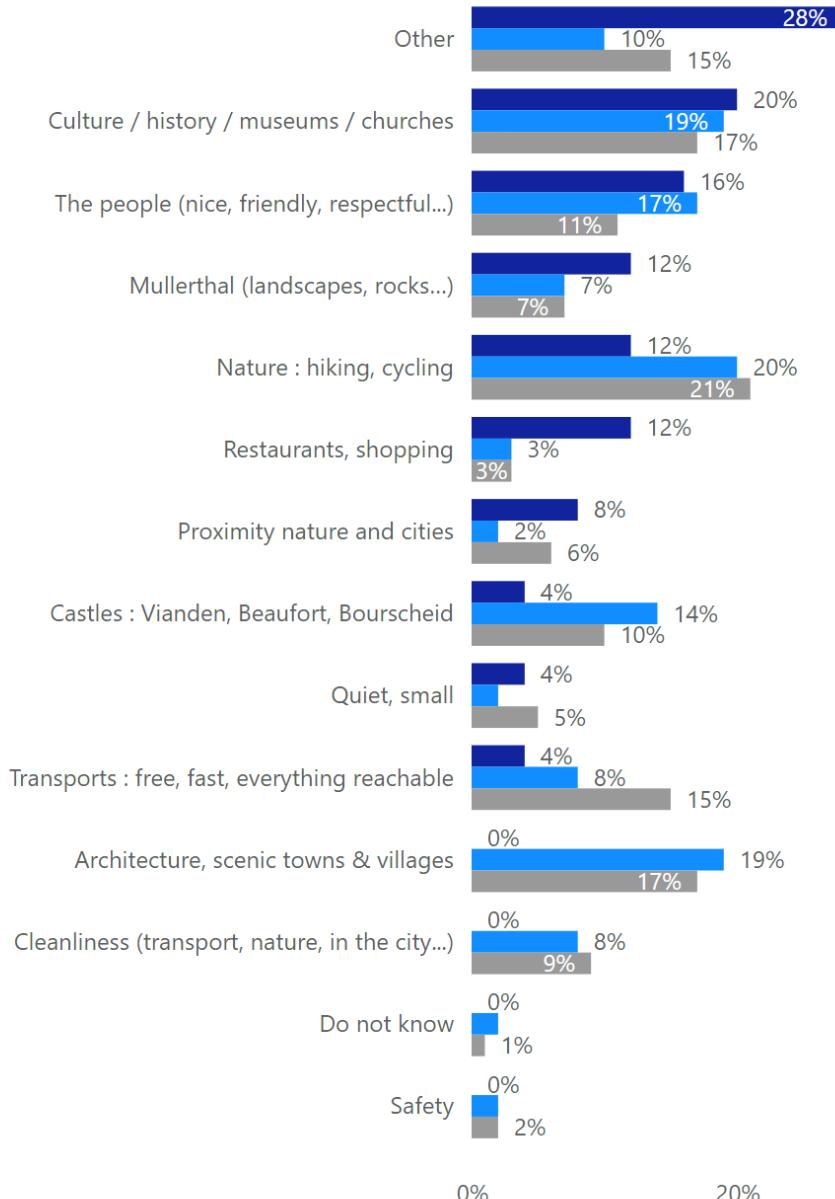


- Happiness, relaxation and trying something new are major emotional benefits for visitors with a culinary holiday.

Particularly positive experience during stay (open question)

Visitors with overnight

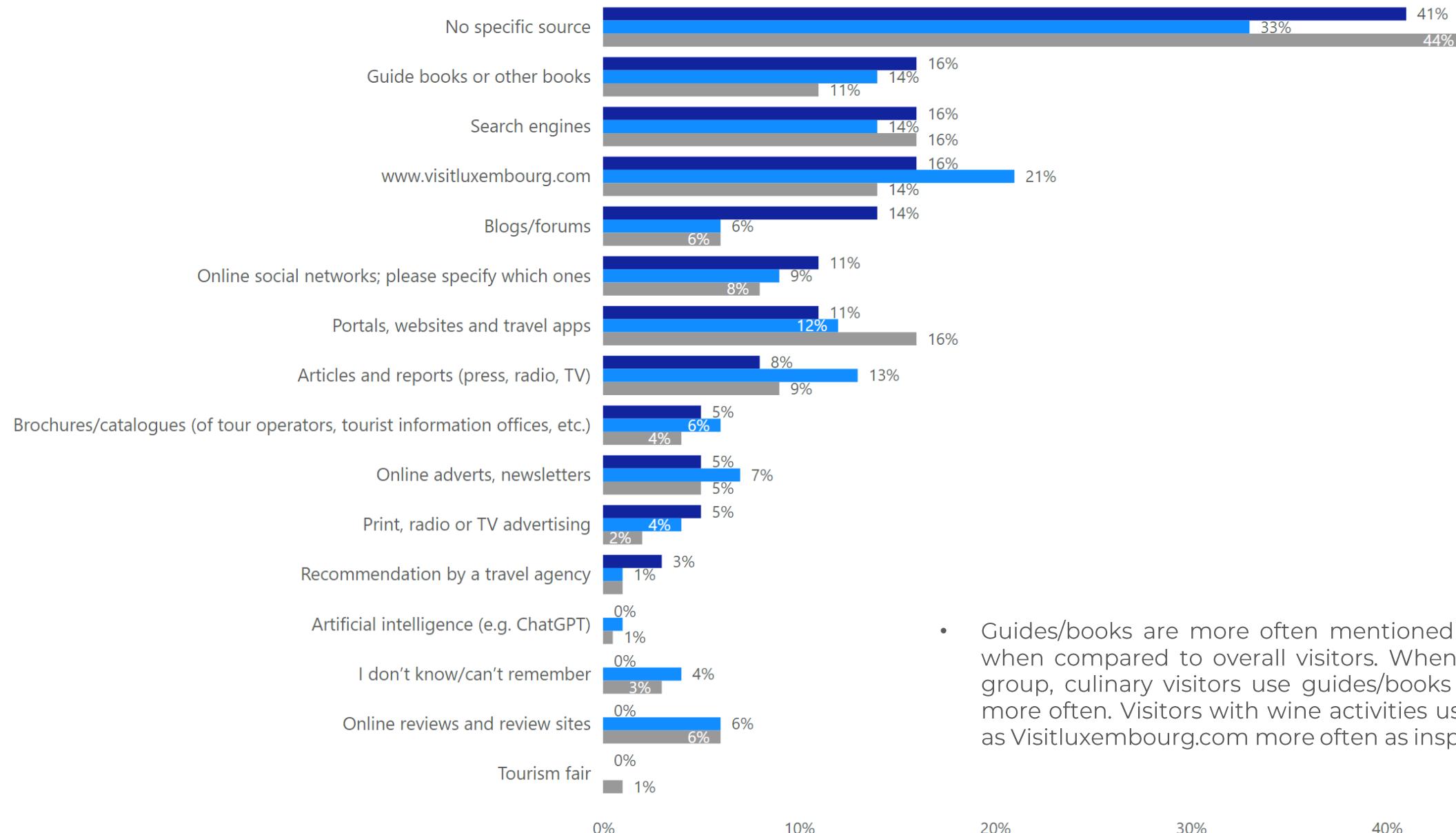
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Inspiration sources

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

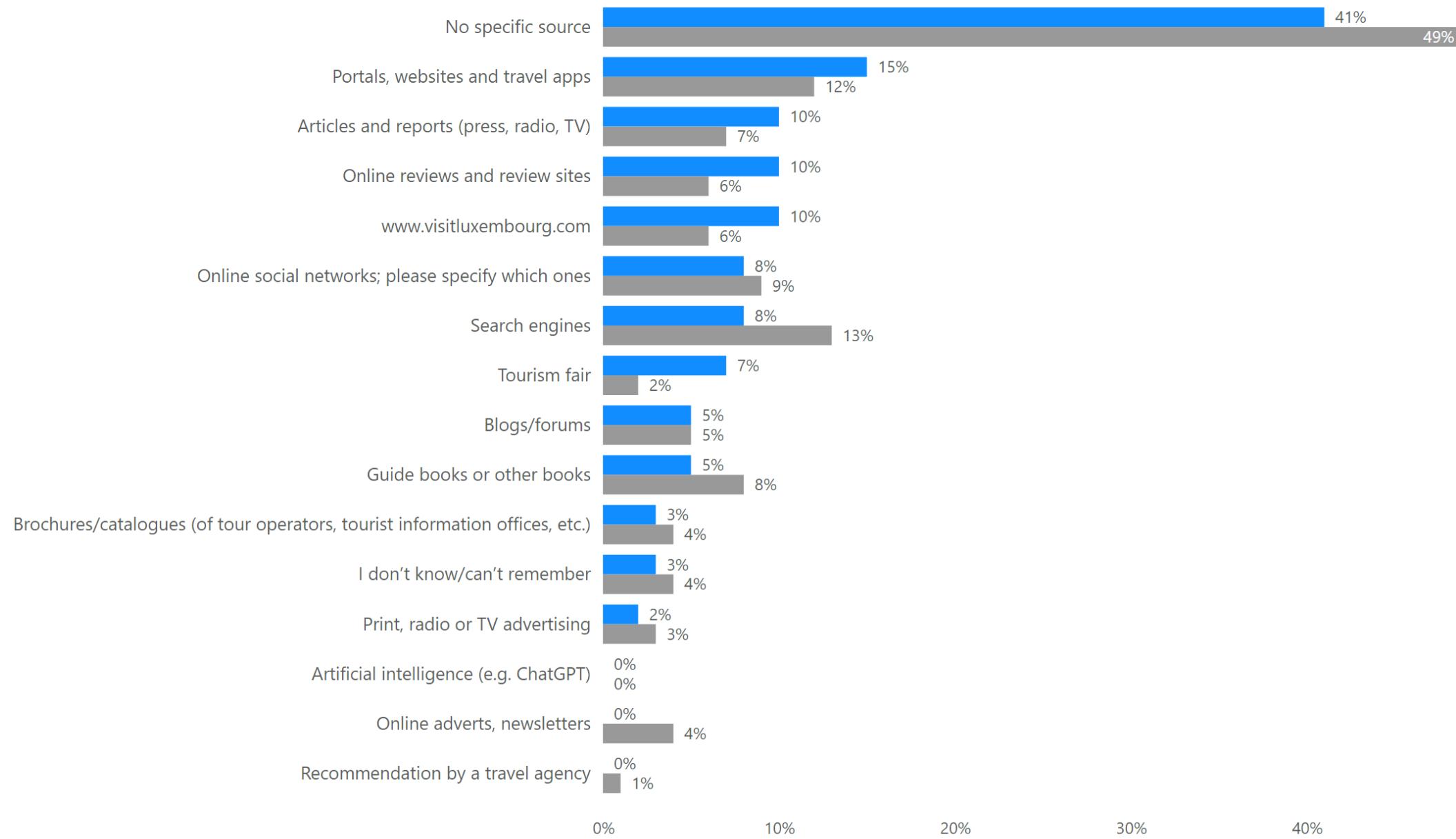


- Guides/books are more often mentioned for both groups when compared to overall visitors. When looking at each group, culinary visitors use guides/books as well as blogs more often. Visitors with wine activities use articles as well as Visitluxembourg.com more often as inspiration sources.

Inspiration sources

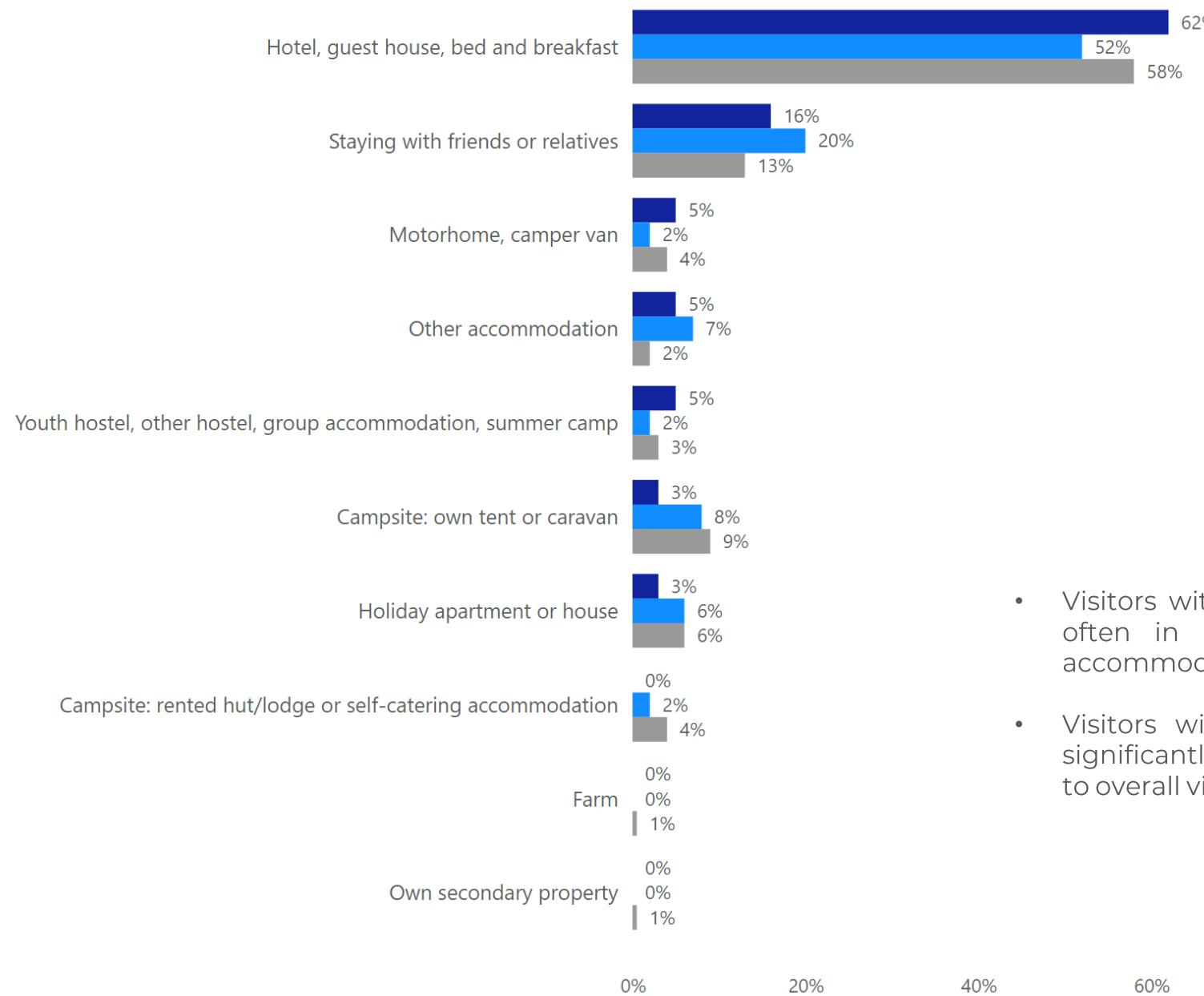
Same-day visitors

● Wine (activity) ● All Inbound



Type of accommodation

● Culinary (holiday type) ● Wine (activity) ● All Inbound

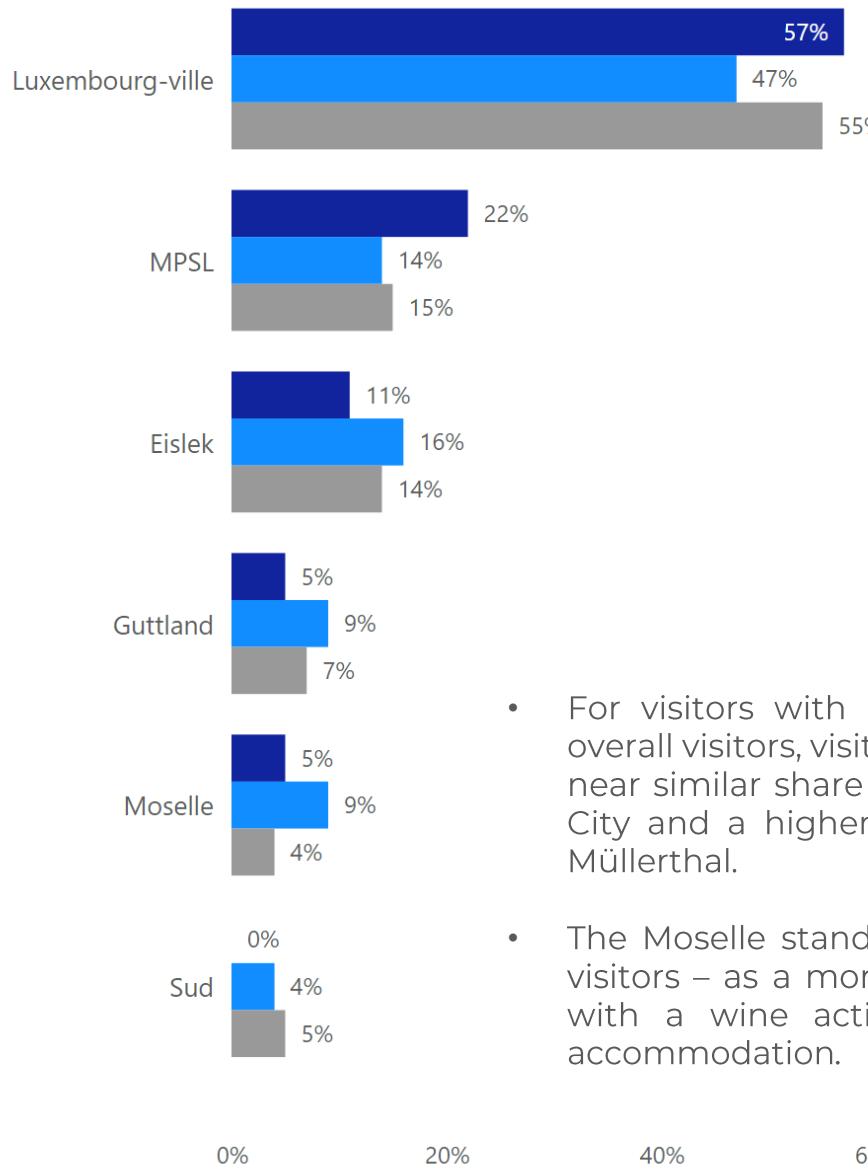


- Visitors with a culinary holiday tend to stay a little more often in hotels. On the other side, campsite-related accommodations are less popular.
- Visitors with a wine tasting as a holiday activity stay significantly more often with friends or relatives compared to overall visitors.

Destination region

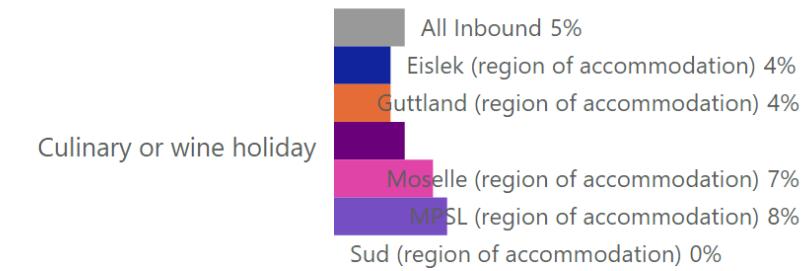
Visitors with overnight

- Culinary (holiday type)
- Wine (activity)
- All Inbound

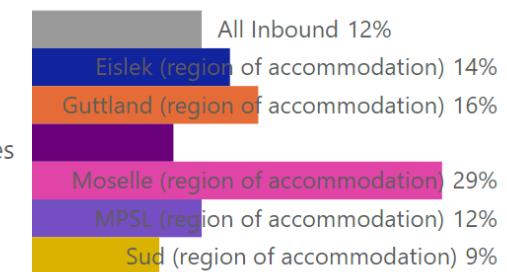


Shares by destination region

Visitors with overnight



Culinary or wine holiday

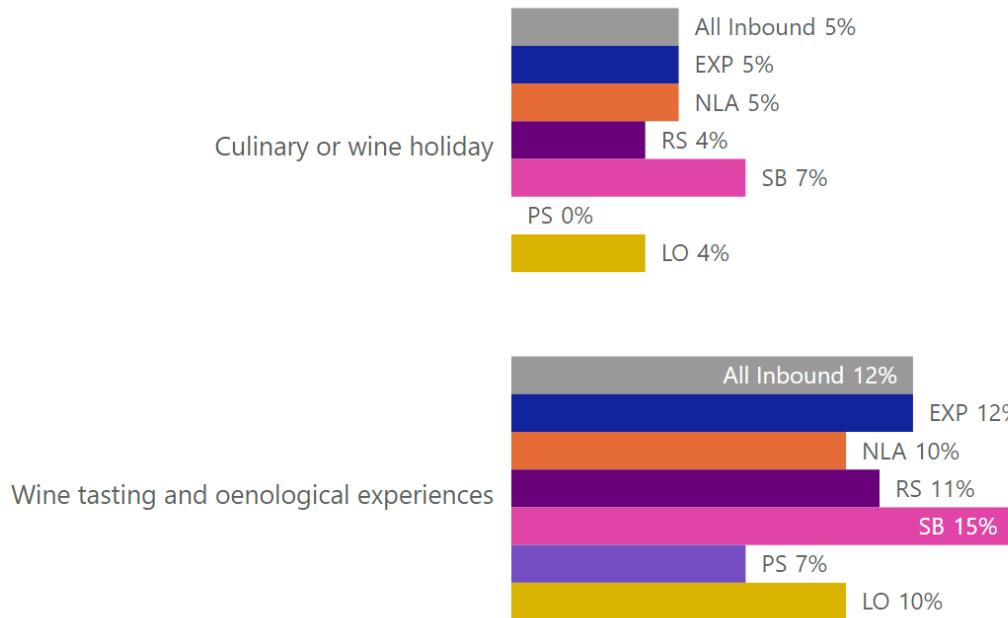


Wine tasting and oenological experience

- For visitors with overnights, when comparing to overall visitors, visitors with a culinary holiday have a near similar share of people going to Luxembourg City and a higher share of visitors staying in the Müllerthal.
- The Moselle stands out - in comparison to overall visitors – as a more popular destination for visitors with a wine activity, especially as a region of accommodation

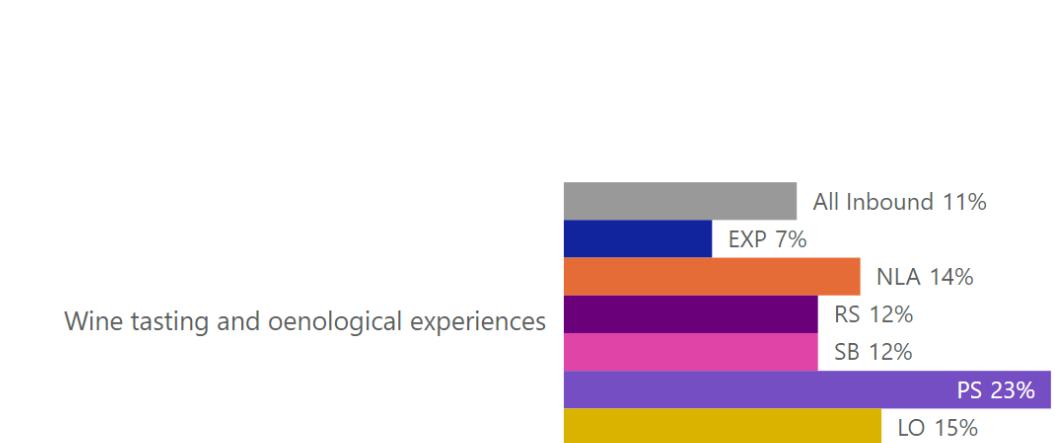
Shares by target segments

Visitors with overnight



Shares by target segments

Same-day visitors



- For visitors with overnights, Short Breakers indicate the highest share both for culinary holiday as well as wine activities.
- In contrast to overnight visitors, same-day Perfection Seekers show a higher share of wine activity.

0%

10%

0%

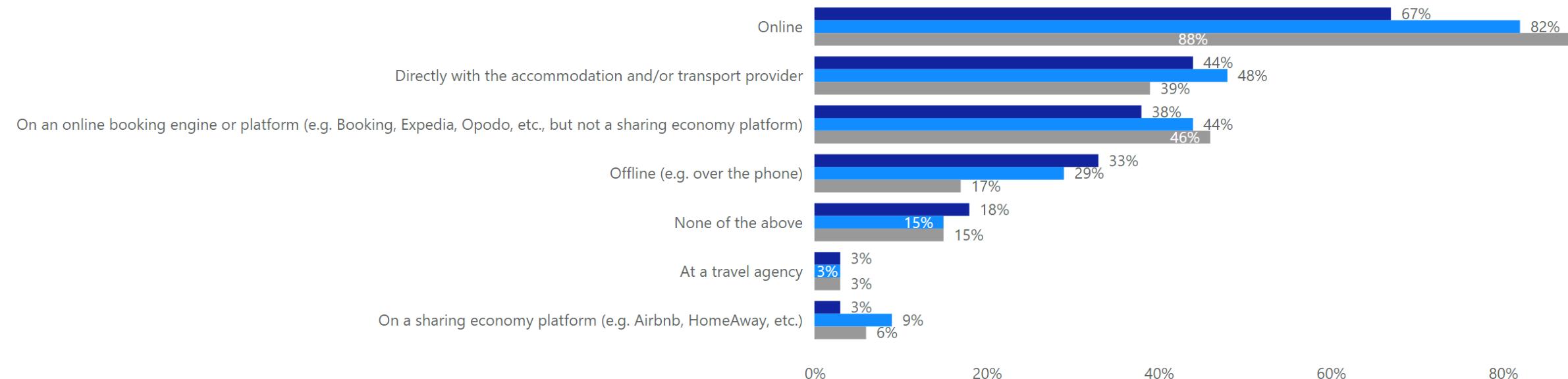
10%

20%

Booking channels

Visitors with overnight

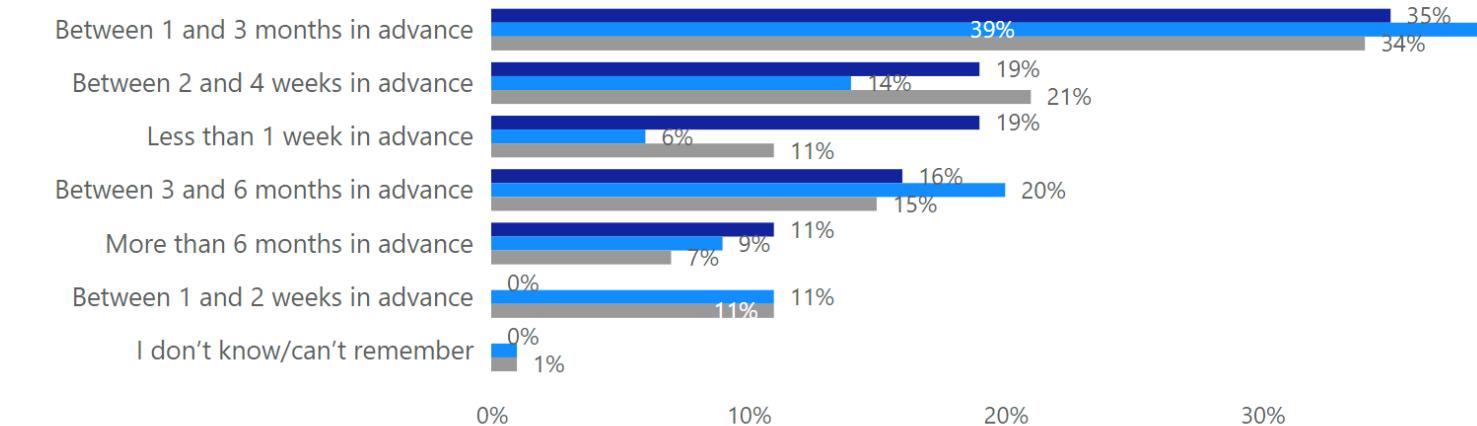
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Decision moment

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

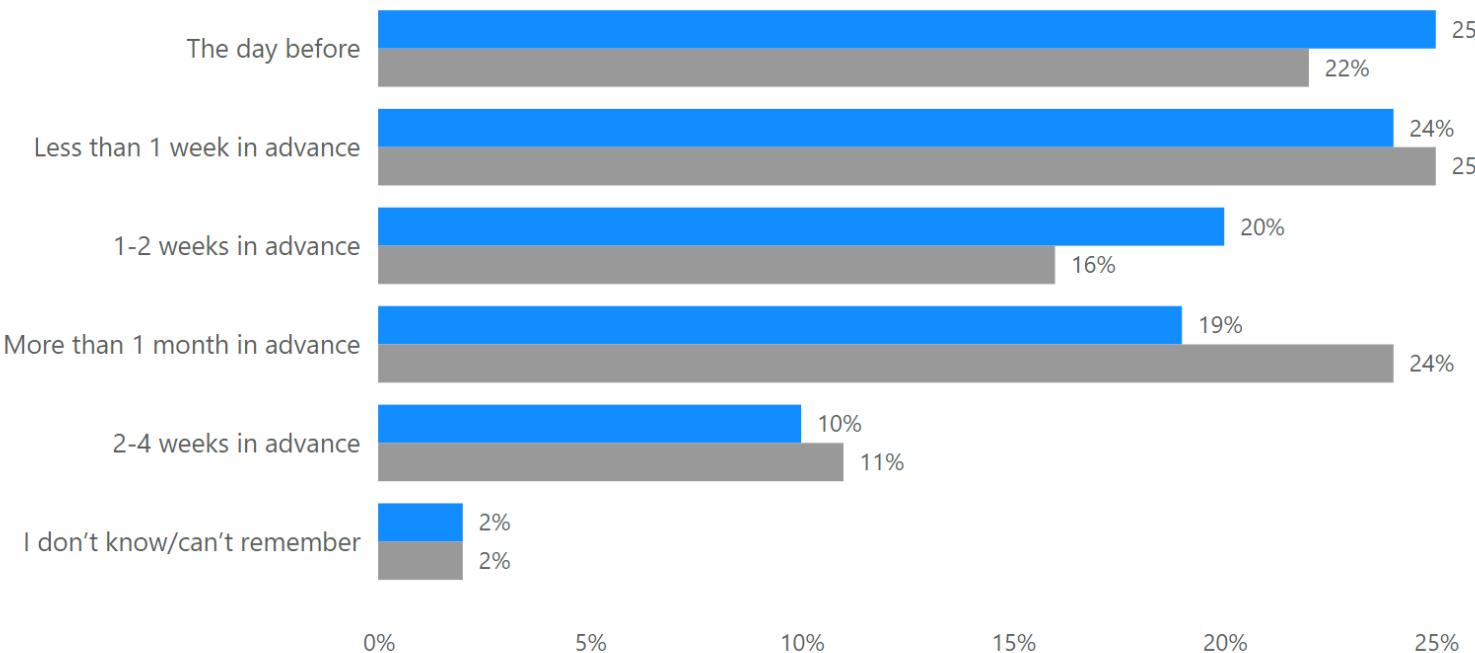


- Booking online is less popular for both culinary and wine visitors. Booking directly with the accommodation and especially offline booking are used to a larger extent when compared to overall visitors.
- With regards to the decision moment, deciding between 1 and 3 months in advance is most popular for both groups. Apart from this, culinary visitors show a higher share of people deciding less than 1 week before and wine visitors tend to decide 3 to 6 months prior.

Decision moment

Same-day visitors

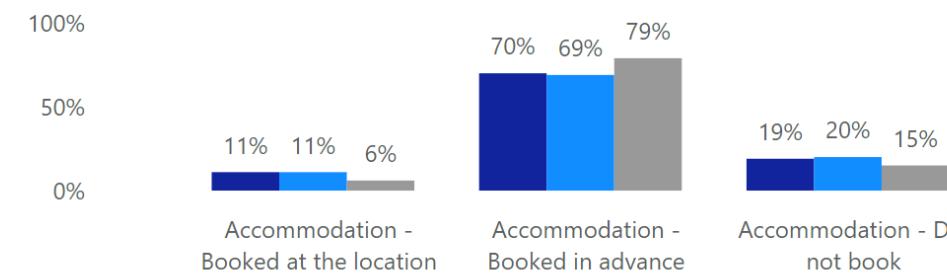
● Wine (activity) ● All Inbound



Booking of travel items

Accommodation

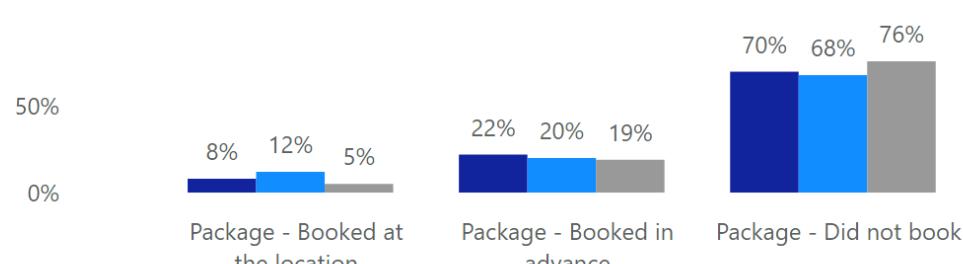
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Booking of travel items

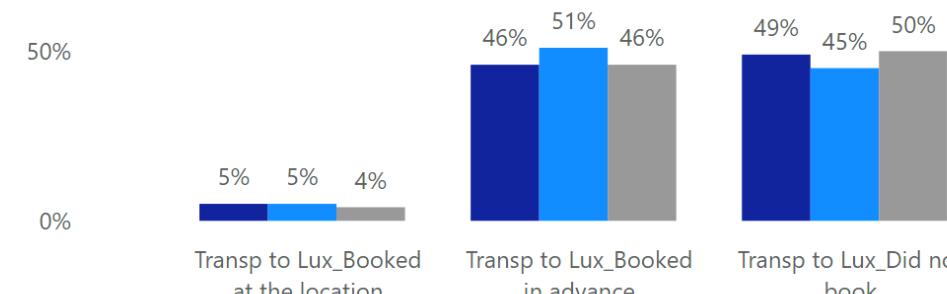
Package

● Culinary (holiday type) ● Wine (activity) ● All Inbound



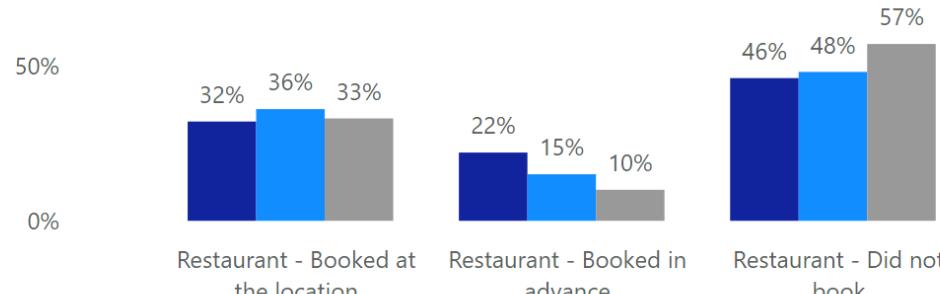
Transport to Luxembourg

● Culinary (holiday type) ● Wine (activity) ● All Inbound



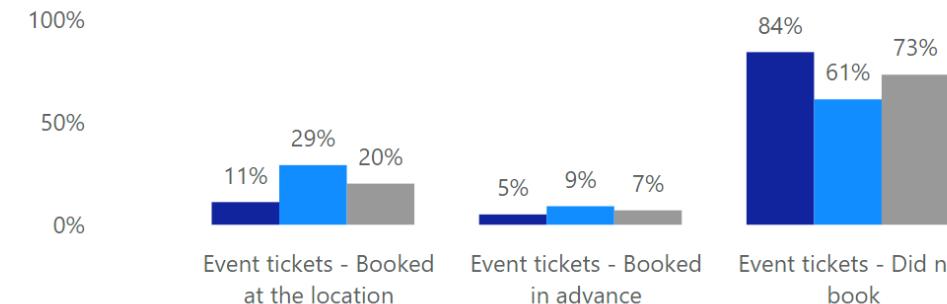
Restaurant

● Culinary (holiday type) ● Wine (activity) ● All Inbound



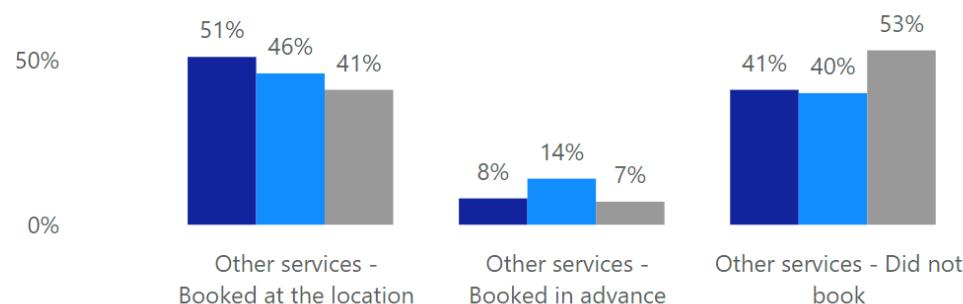
Event tickets

● Culinary (holiday type) ● Wine (activity) ● All Inbound



Other services

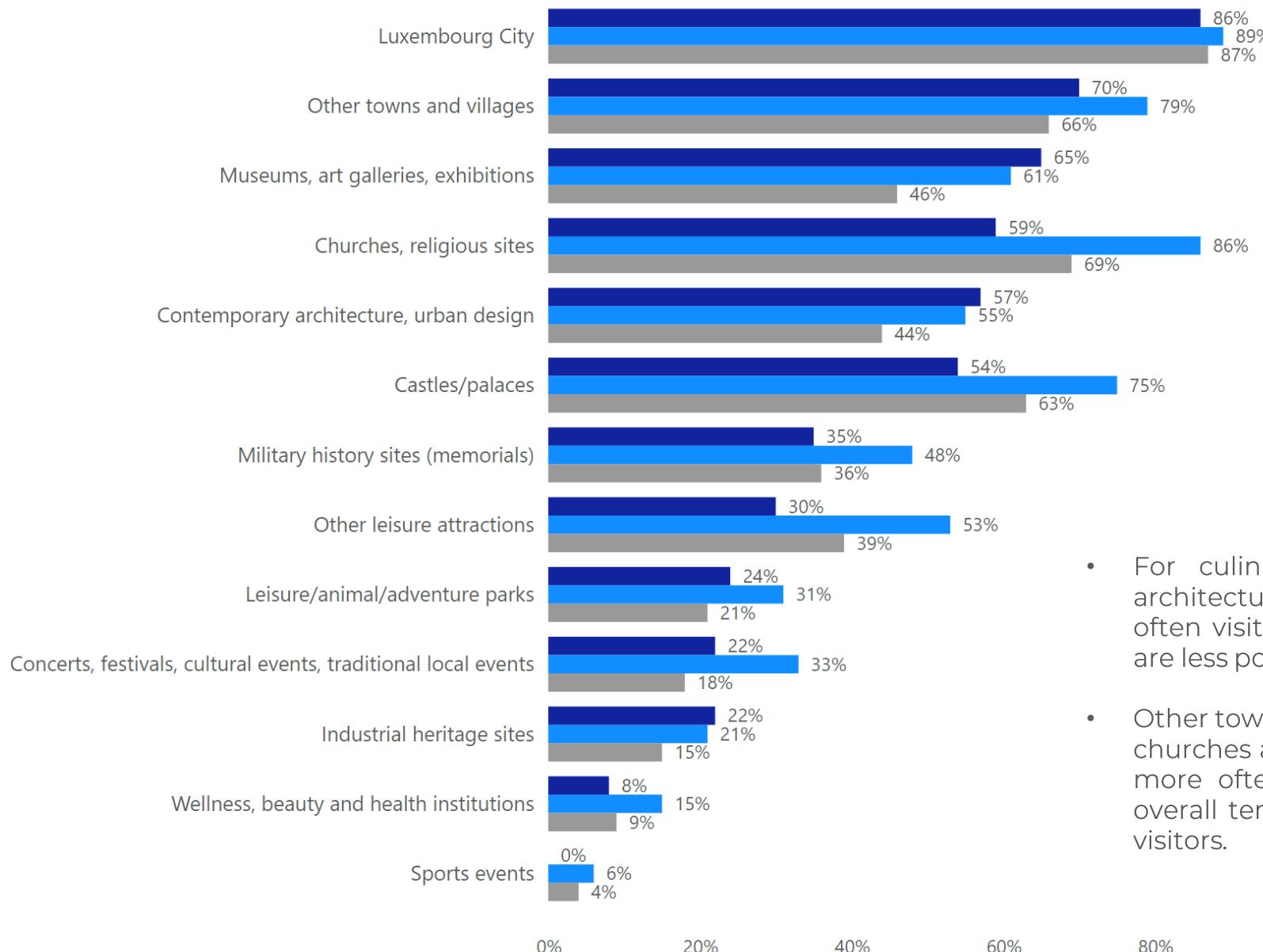
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Places visited

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

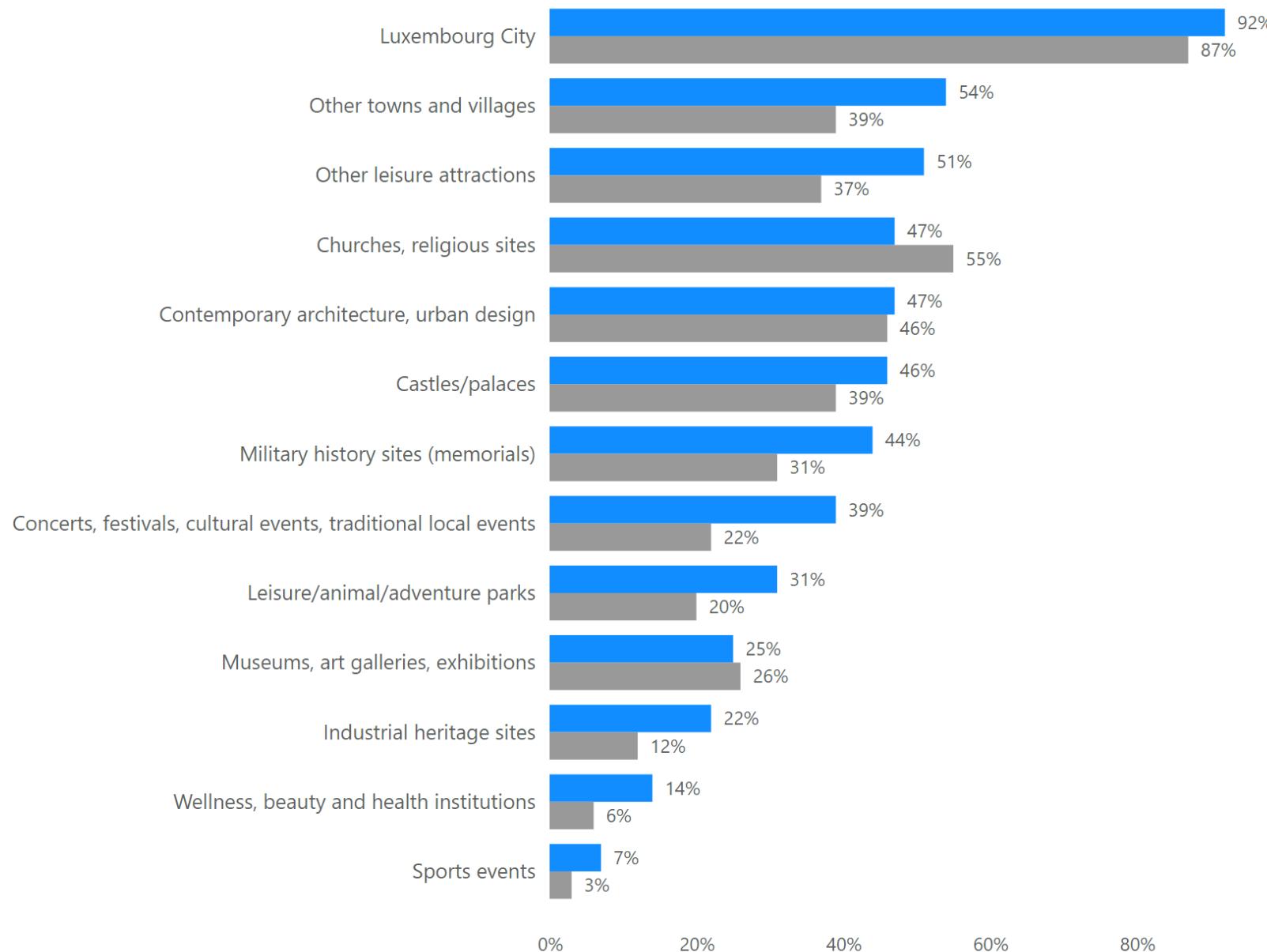


- For culinary visitors, museums as well contemporary architecture and industrial heritage sites are way more often visited than by overall visitors. Churches and castles are less popular.
- Other towns and villages, museums, concerts and especially churches as well as castles and other leisure attractions are more often visited by visitors with wine activities. They overall tend to make more visits compared to all inbound visitors.

Places visited

Same-day visitors

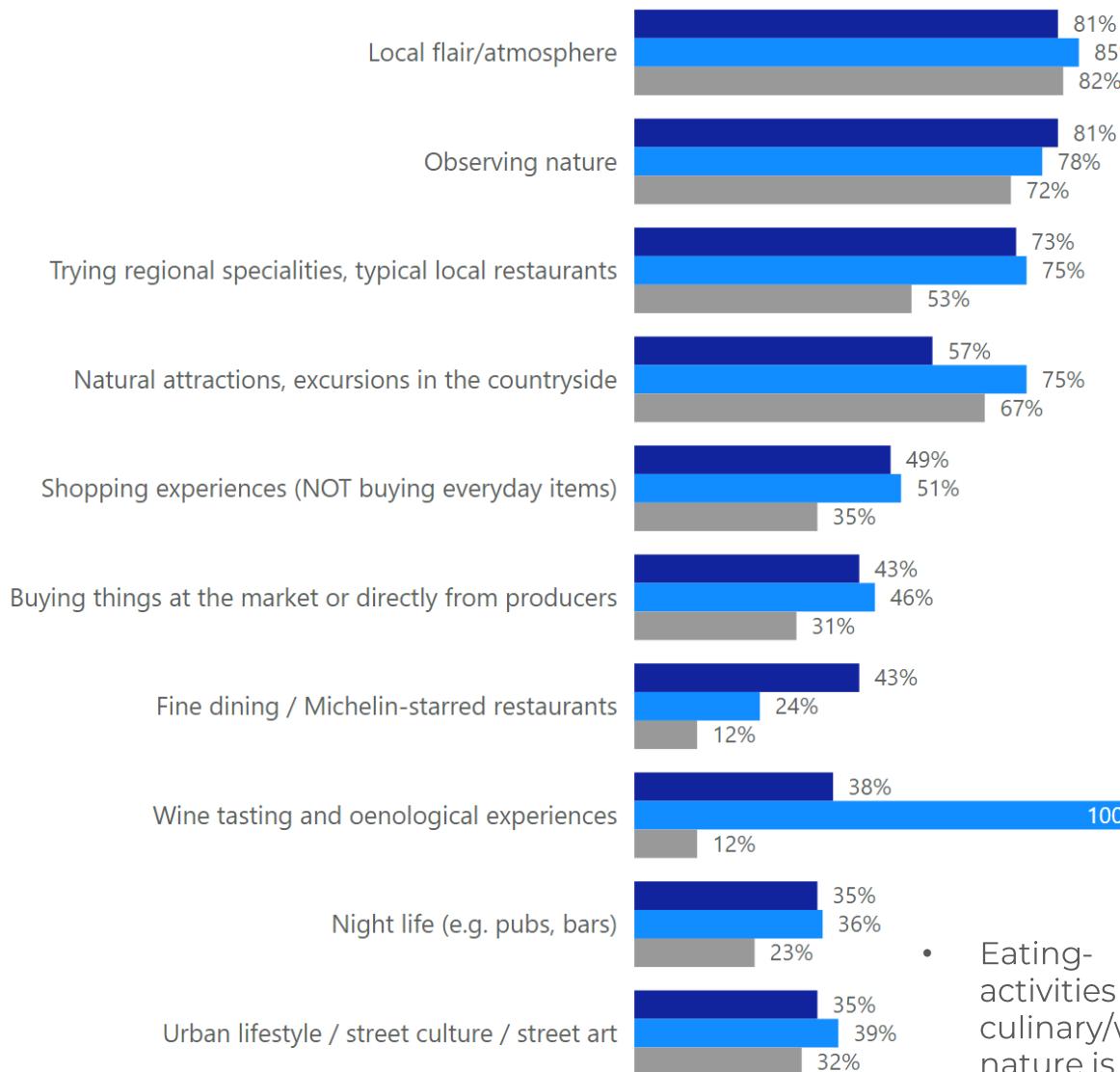
● Wine (activity) ● All Inbound



Non-sporting activities

Visitors with overnight

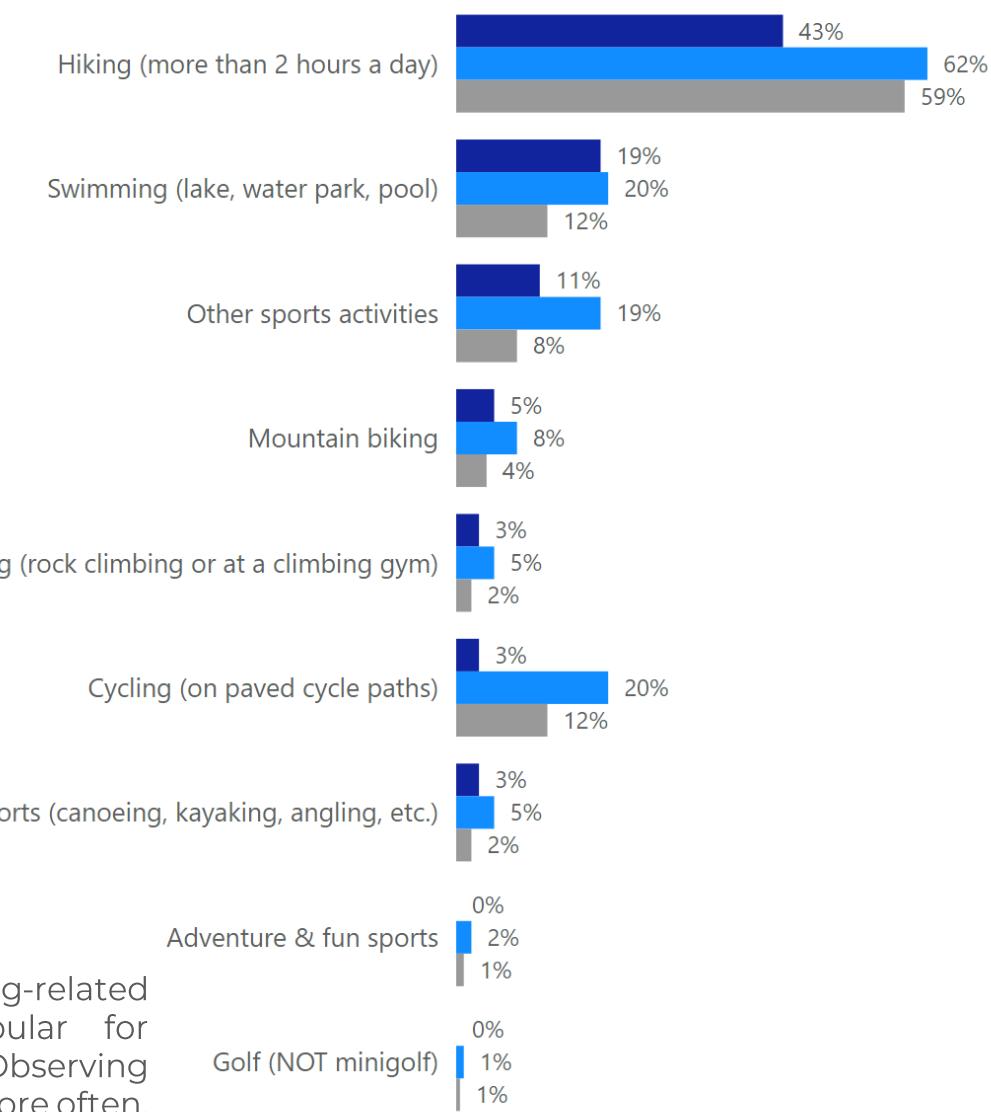
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Sporting activities

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound



- Eating- and shopping-related activities are more popular for culinary/wine visitors. Observing nature is also mentioned more often.

0%

50%

100%

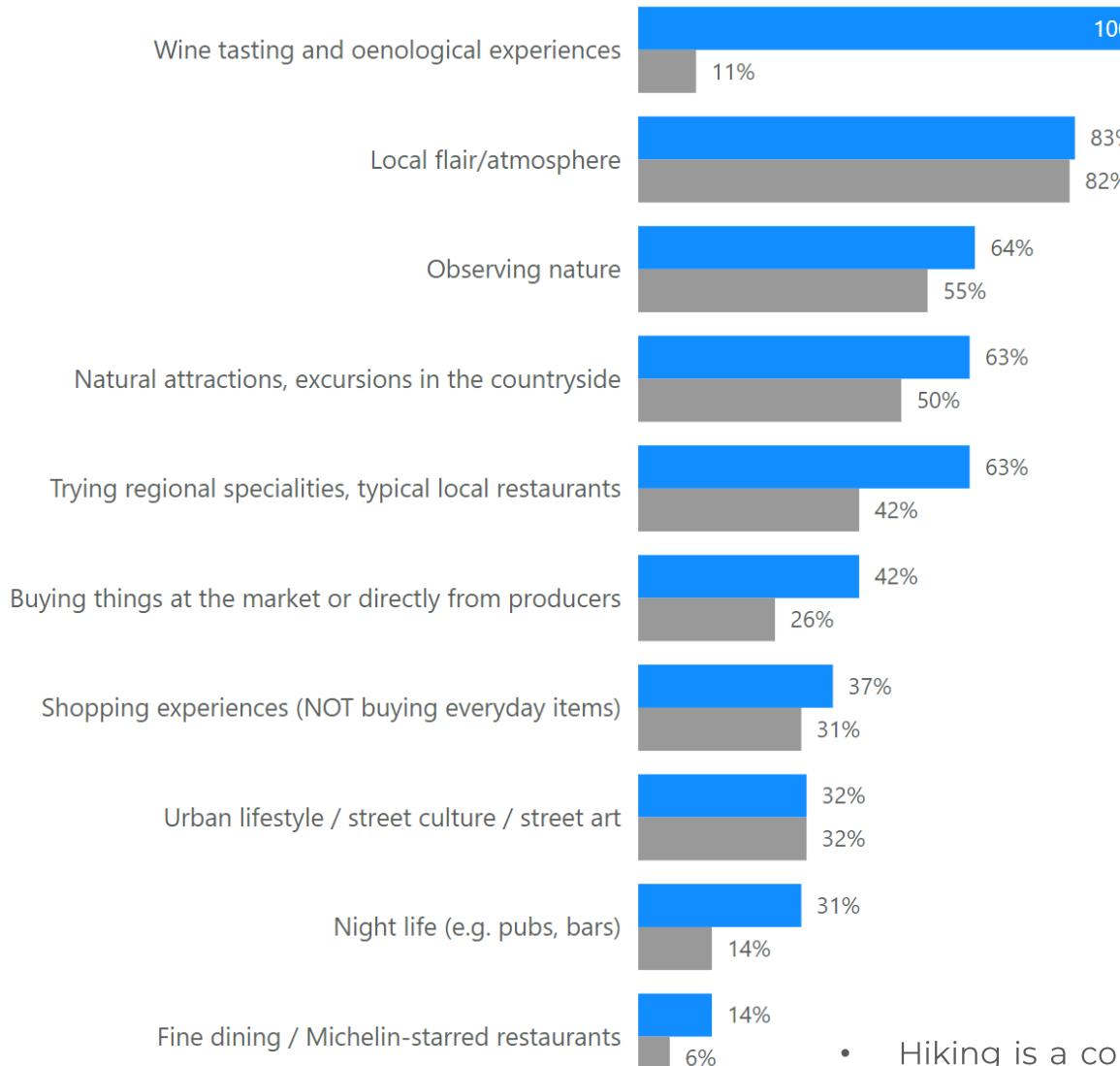
0%

50%

Non-sporting activities

Same-day visitors

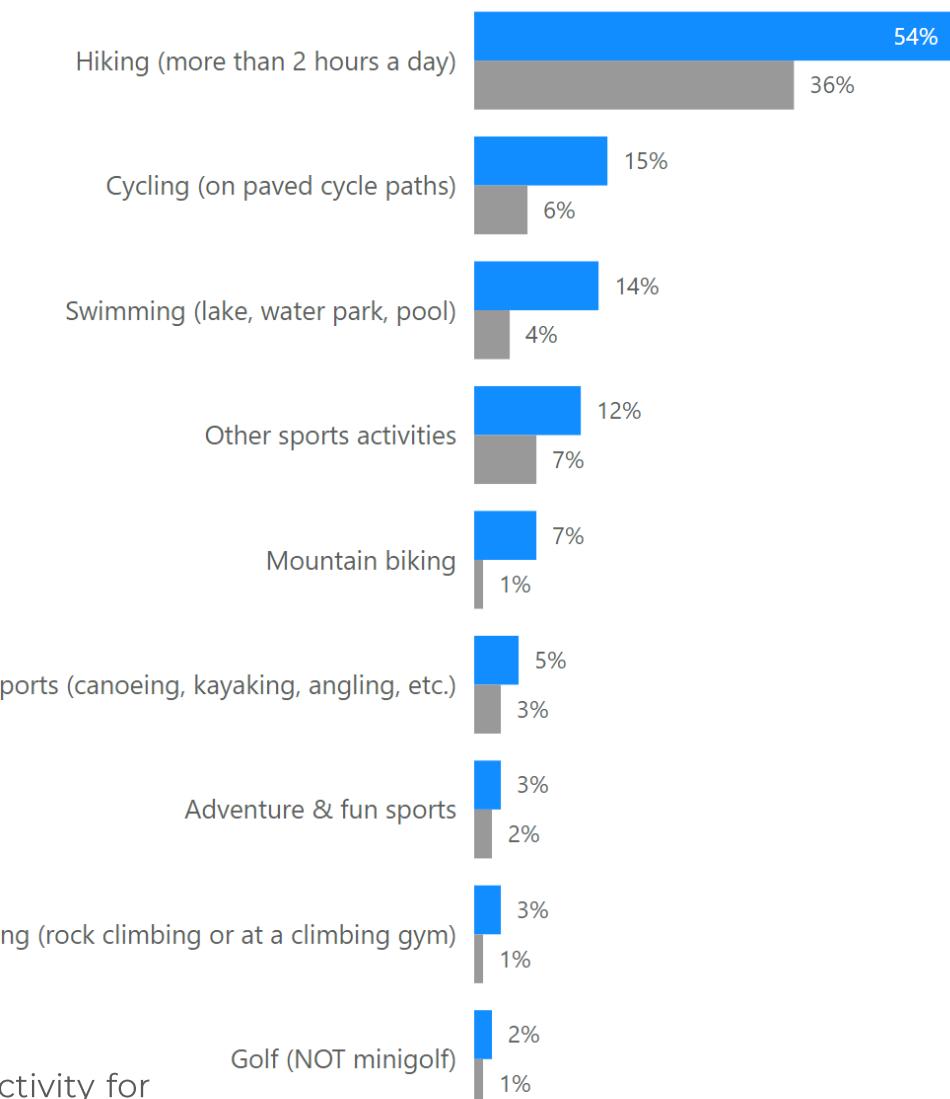
● Wine (activity) ● All Inbound



Sporting activities

Same-day visitors

● Wine (activity) ● All Inbound



- Hiking is a common sporting activity for same-day visitors with wine activities.

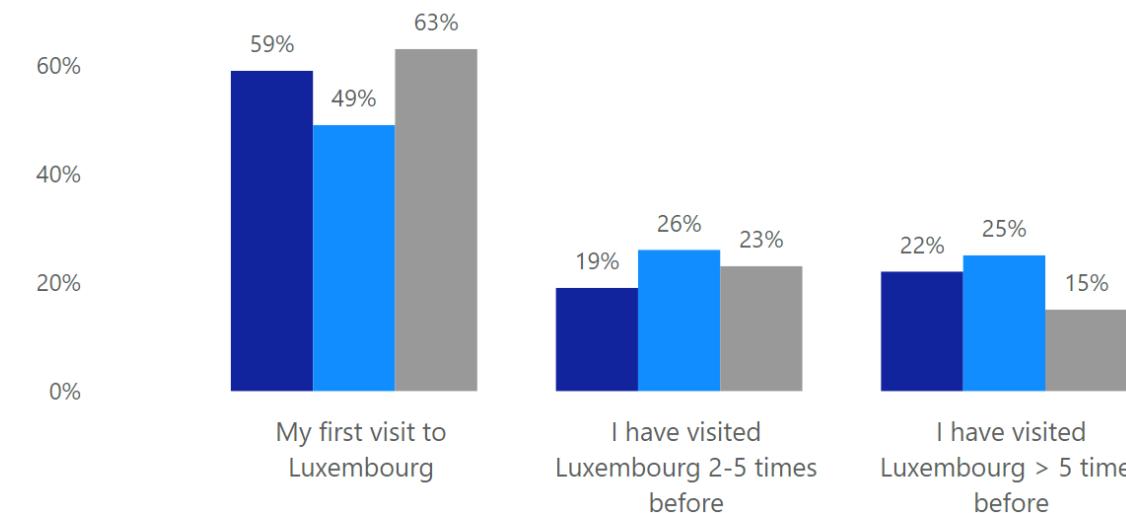
0% 50% 100%

0% 50%

Frequency of visit

Visitors with overnight

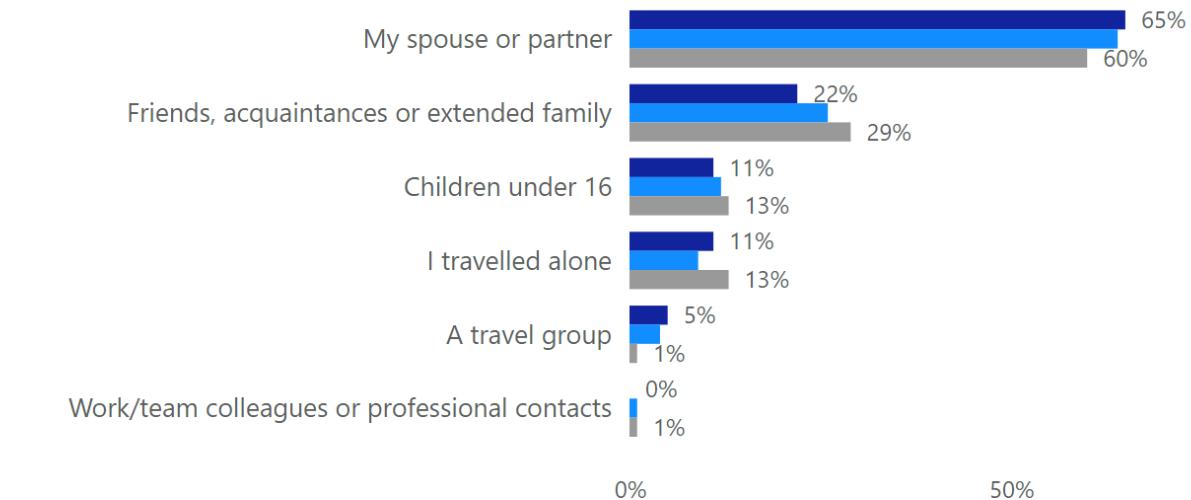
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Travel party

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound



First-time visitors

Visitors with overnight

59%

Culinary (holiday type)

49%

Wine (activity)

63%

All Inbound

Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

44%

Culinary (holiday type)

48%

Wine (activity)

39%

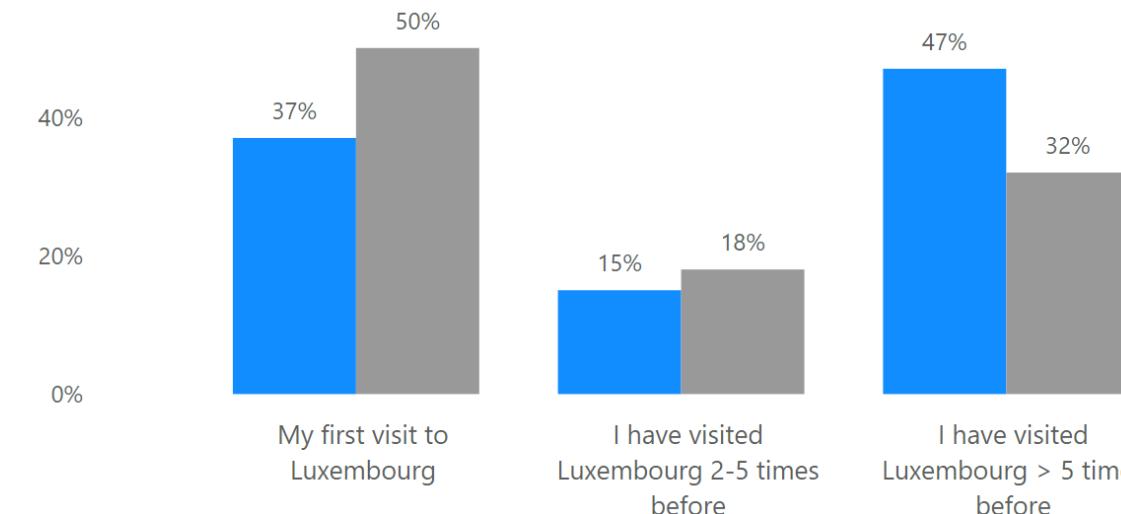
All Inbound

- Culinary visitors as well as those with wine activities tend to have visited more often Luxembourg over 5 times previously when compared to overall visitors. Especially wine visitors show a considerably lower share of first-time visitors.
- Couples are a bit more common as travel parties while friends are mentioned less often by culinary/wine visitors.
- Both groups indicate a higher share of visitors spending nights in Luxembourg and abroad during the same trip.

Frequency of visit

Same-day visitors

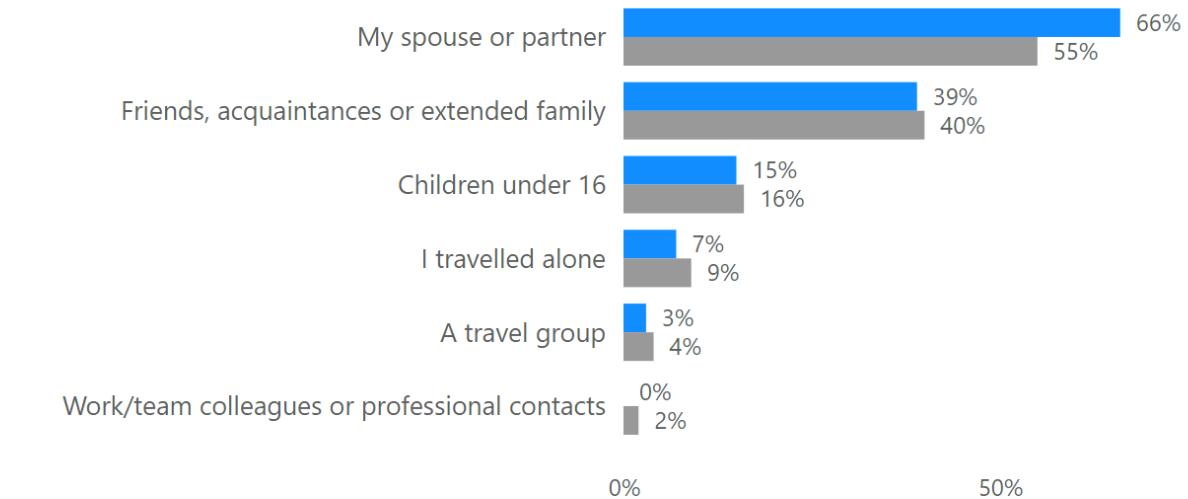
● Wine (activity) ● All Inbound



Travel party

Same-day visitors

● Wine (activity) ● All Inbound



First-time visitors

Same-day visitors

37%
Wine

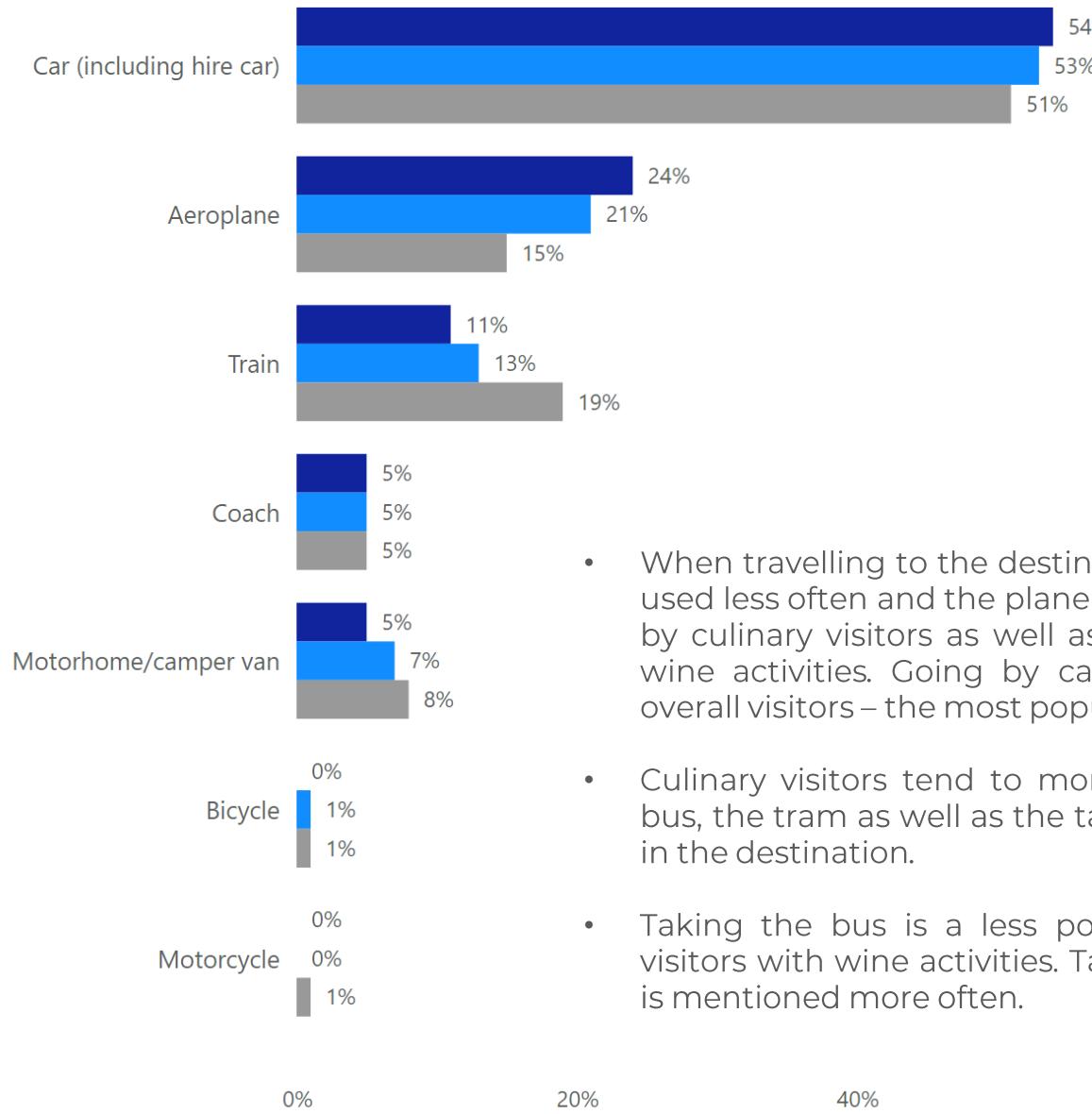
50%
All Inbound

- The share of visitors having visited Luxembourg more than 5 times is even higher for same-day visitors with wine activities.
- Travelling with one's spouse or partner is also mentioned significantly more often.

Transport to destination

Visitors with overnight

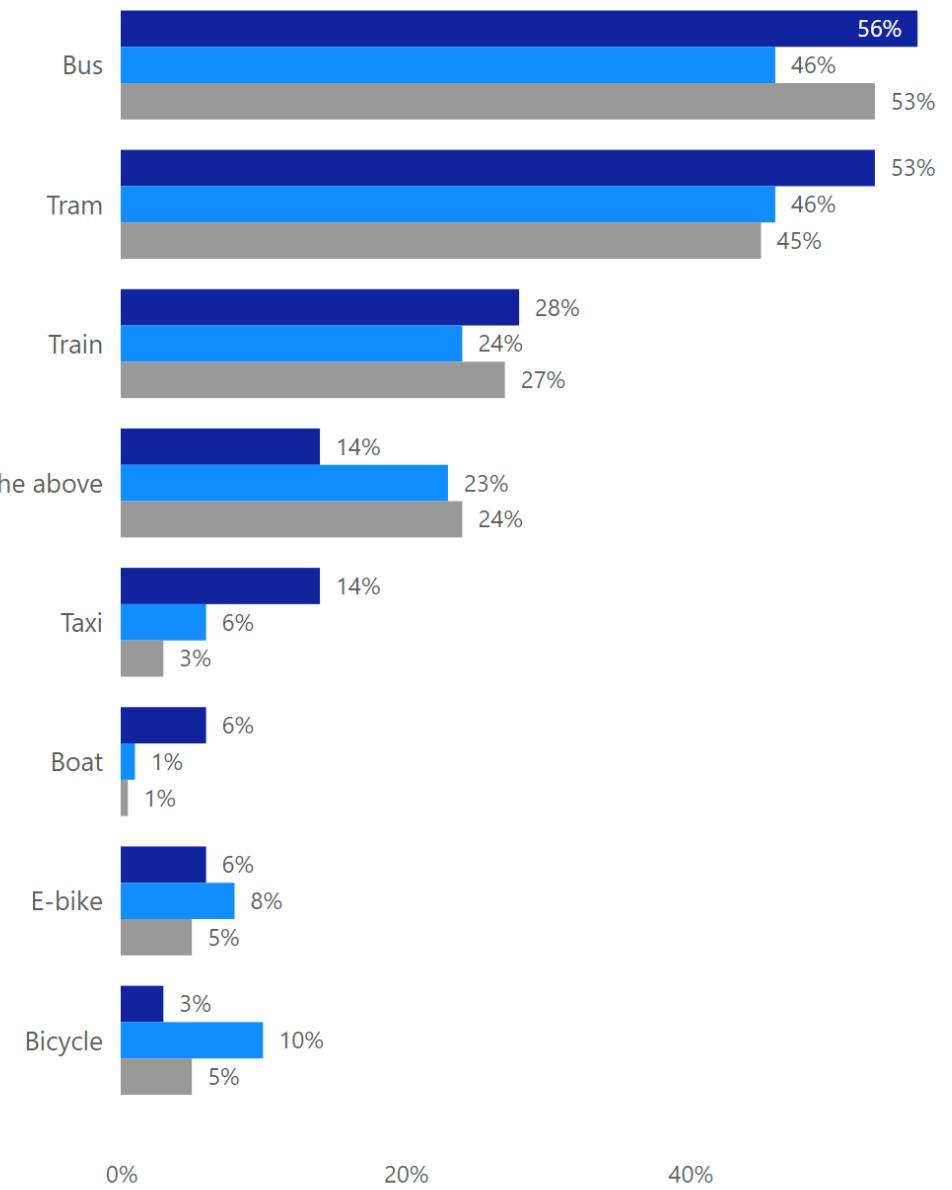
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Transport in destination

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

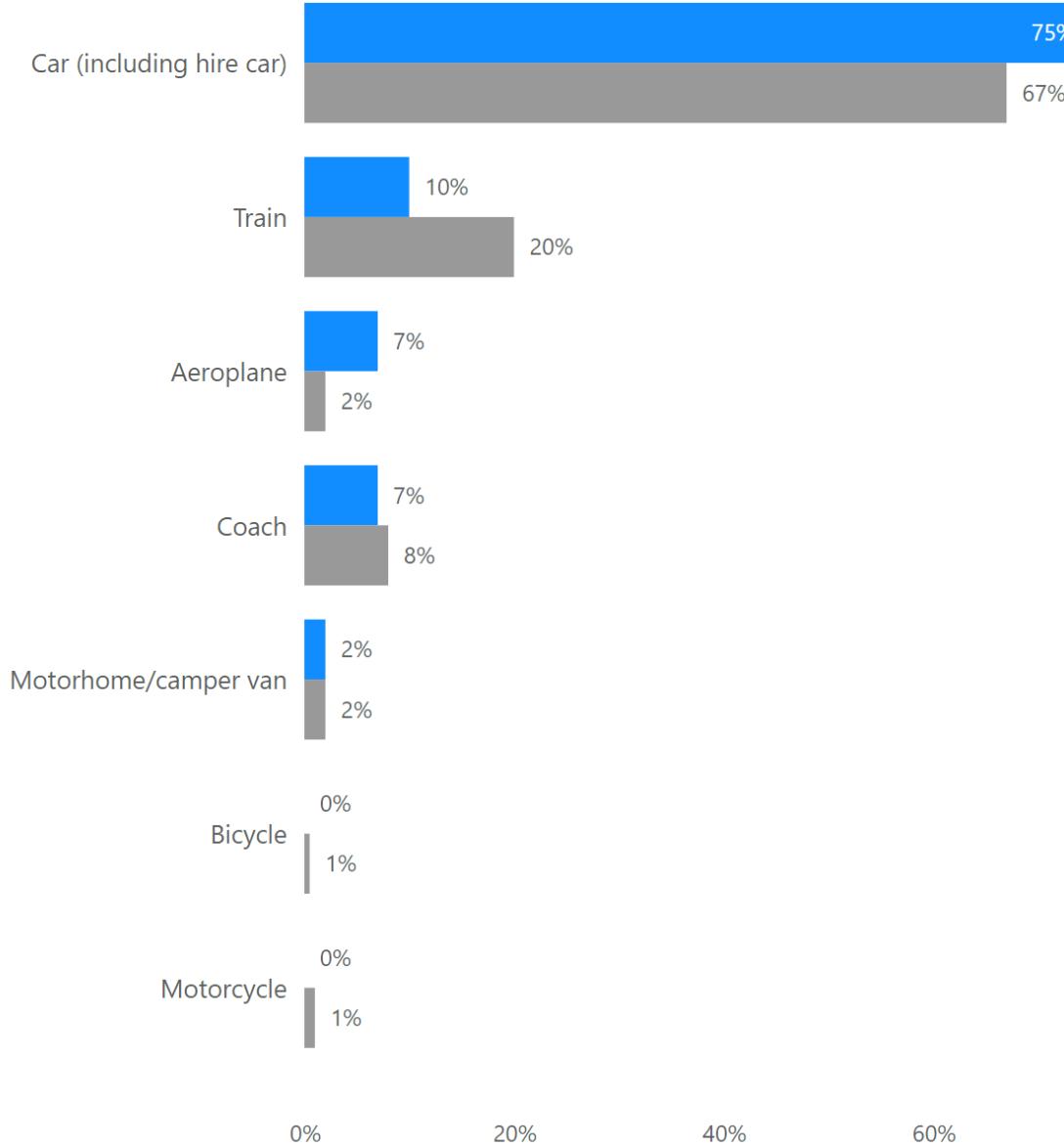


- When travelling to the destination, the train is used less often and the plane used more often by culinary visitors as well as those having a wine activities. Going by car is – similar to overall visitors – the most popular choice.
- Culinary visitors tend to more often use the bus, the tram as well as the taxi to get around in the destination.
- Taking the bus is a less popular choice for visitors with wine activities. Taking the bicycle is mentioned more often.

Transport to destination

Same-day visitors

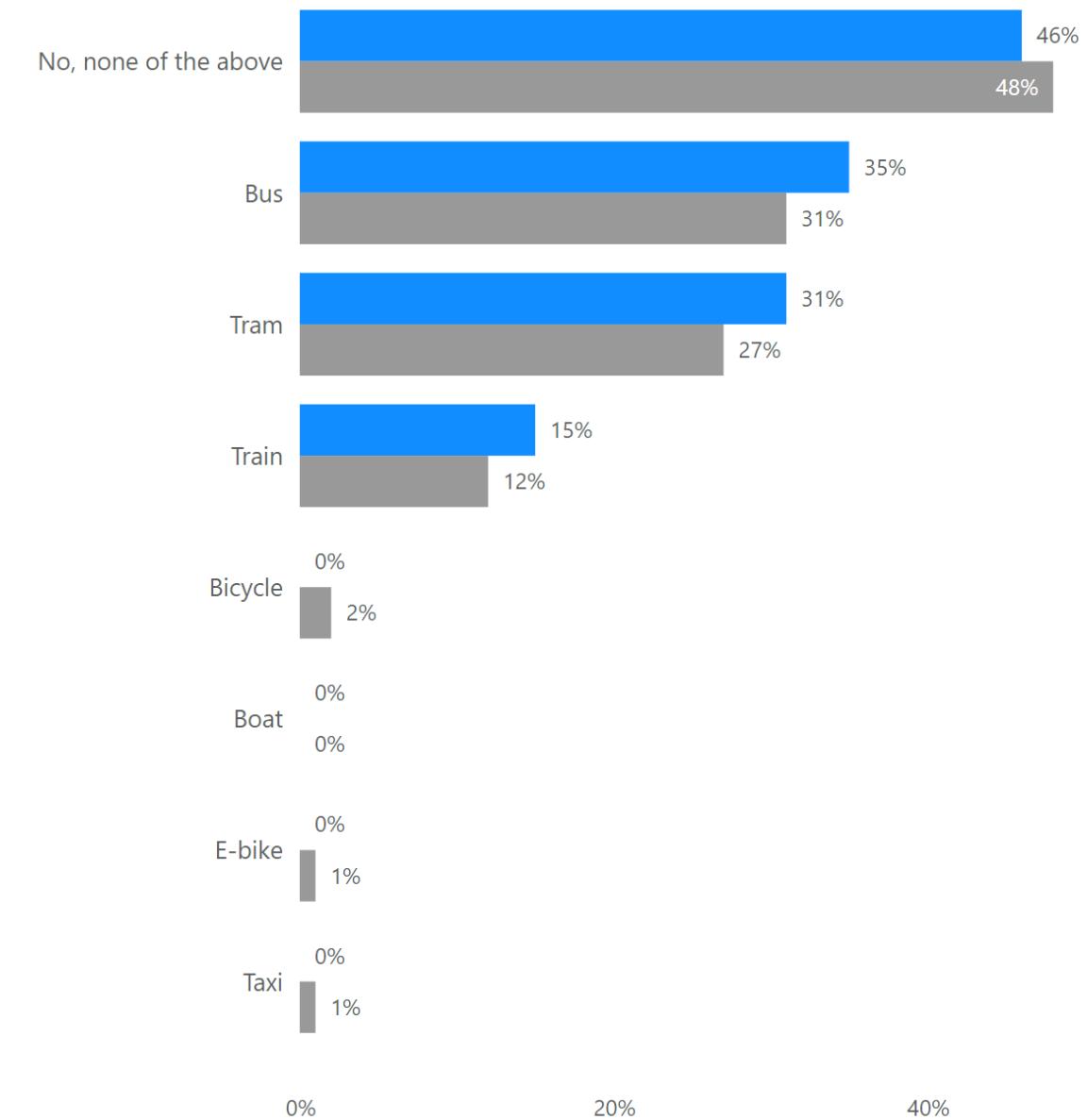
● Wine (activity) ● All Inbound



Transport in destination

Same-day visitors

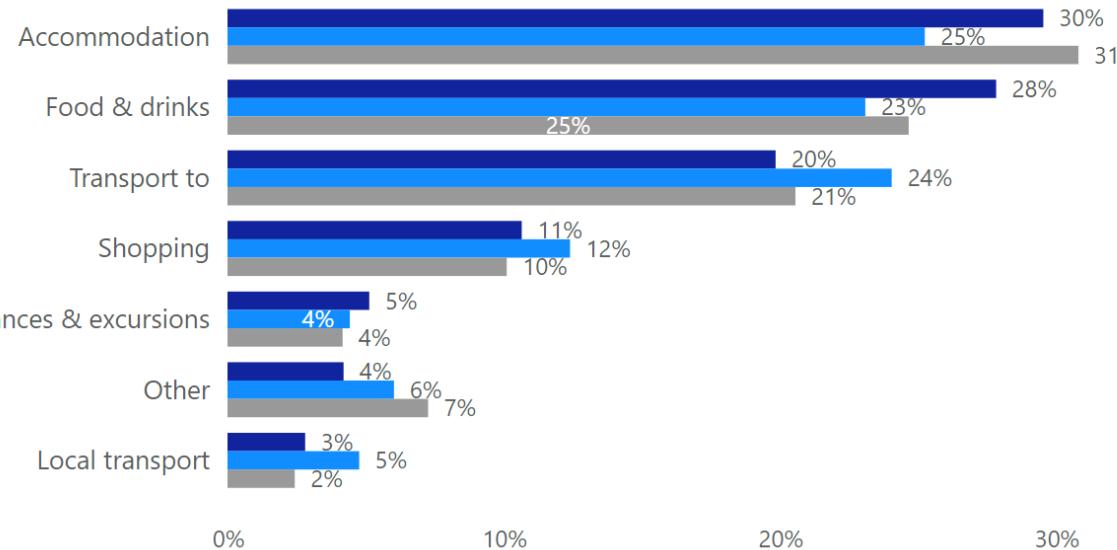
● Wine (activity) ● All Inbound



Spending categories

Visitors with overnight

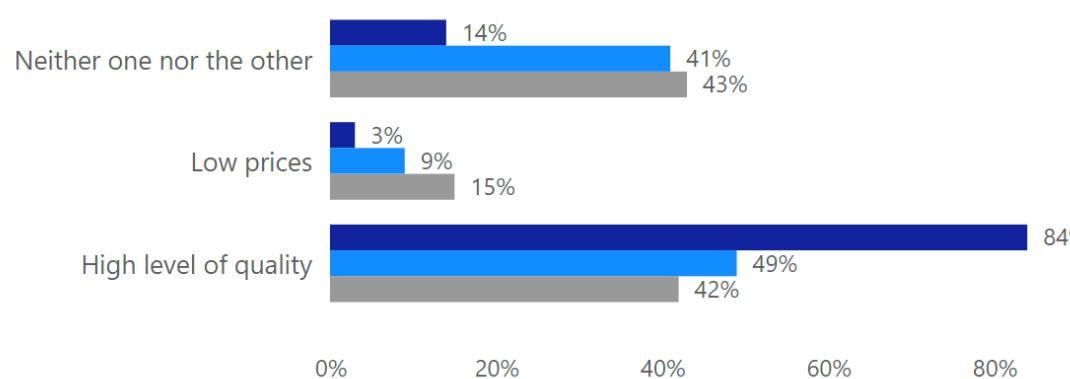
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Quality vs. price orientation

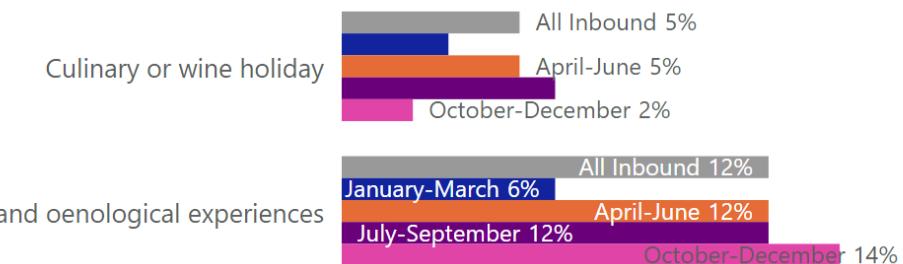
Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound



Shares by arrival months

Visitors with overnight



- Visitors with a culinary holiday are especially quality-oriented while also spending significantly more money on their trips. Those with a wine activity indicated even higher spending per trip.
- Wine seems to be, except for the timespan from January to March, an activity that is popular all year long.

Spend/pers./trip

Visitors with overnight

864 €

Culinary (holiday type)

Spend/pers./night

Visitors with overnight

203 €

Culinary (holiday type)

Length of stay (nights)

Visitors with overnight

4,3

Culinary (holiday type)

971 €

Wine (activity)

219 €

Wine (activity)

4,4

Wine (activity)

619 €

All Inbound

160 €

All Inbound

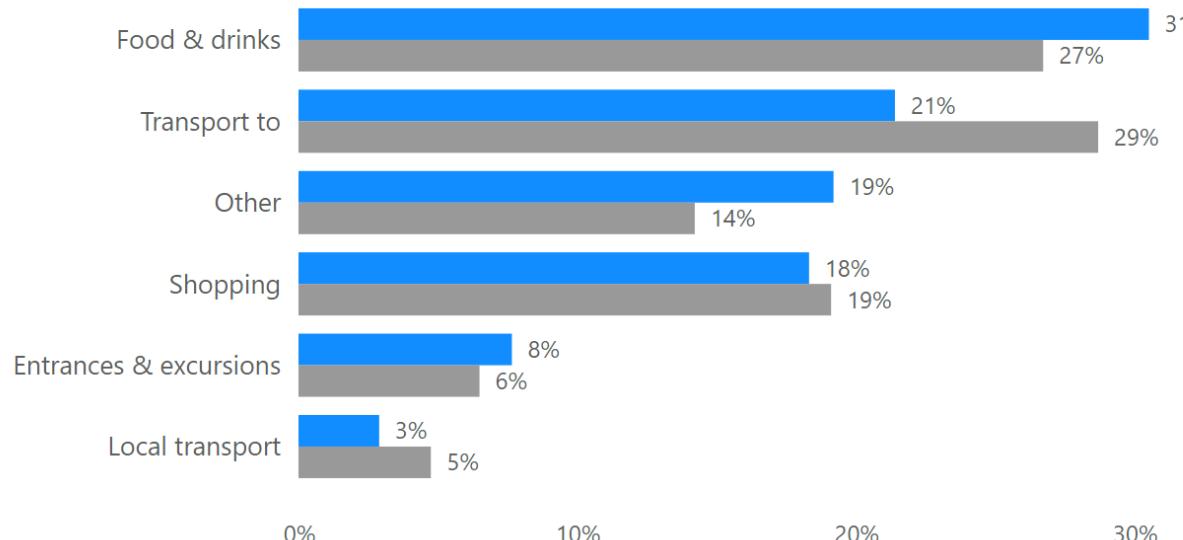
3,9

All Inbound

Spending categories

Same-day visitors

● Wine (activity) ● All Inbound



Spend/pers./excurs.

Same-day visitors

404 €

Wine

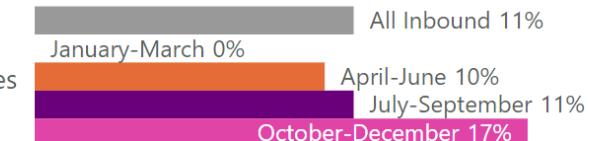
245 €

All Inbound

Shares by arrival months

Same-day visitors

Wine tasting and oenological experiences



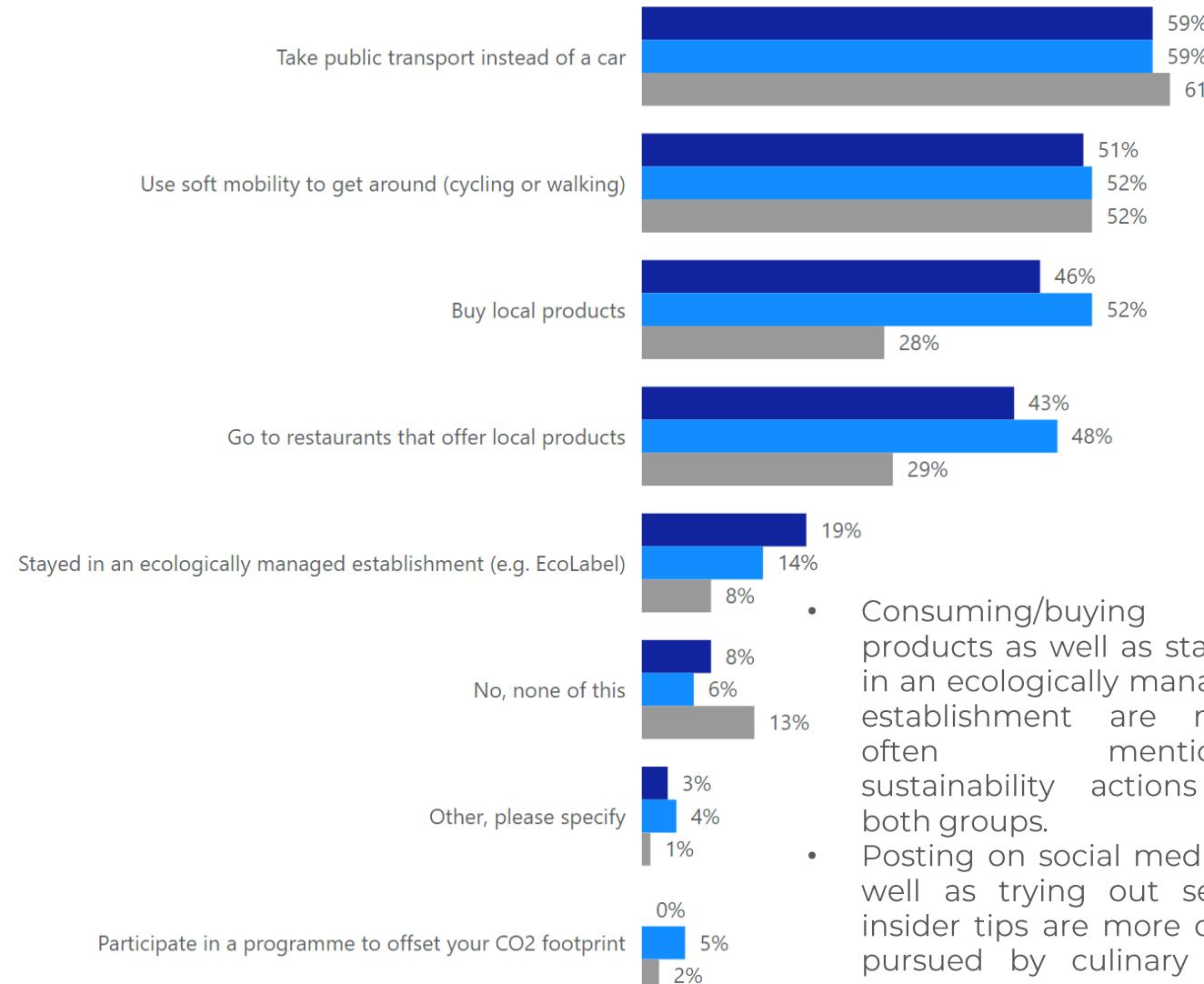
All Inbound 11%

- Expenses by same-day visitors with wine activities are also significantly higher when compared to overall same-day visitors.
- A larger share than average of October to December same-day visitors pursue wine activities during their excursion.

Sustainable actions during stay

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

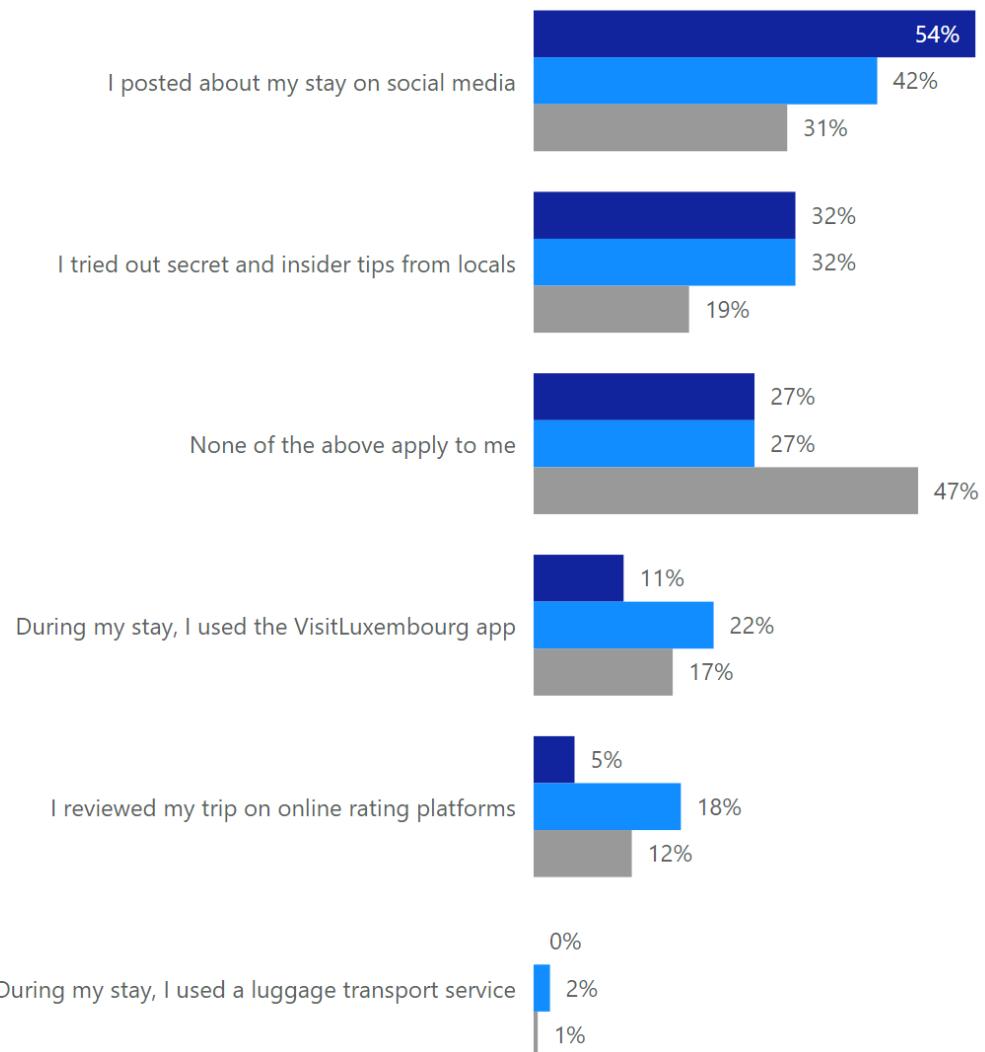


- Consuming/buying local products as well as staying in an ecologically managed establishment are more often mentioned sustainability actions for both groups.
- Posting on social media as well as trying out secret insider tips are more often pursued by culinary and wine visitors.

Services used during stay

Visitors with overnight

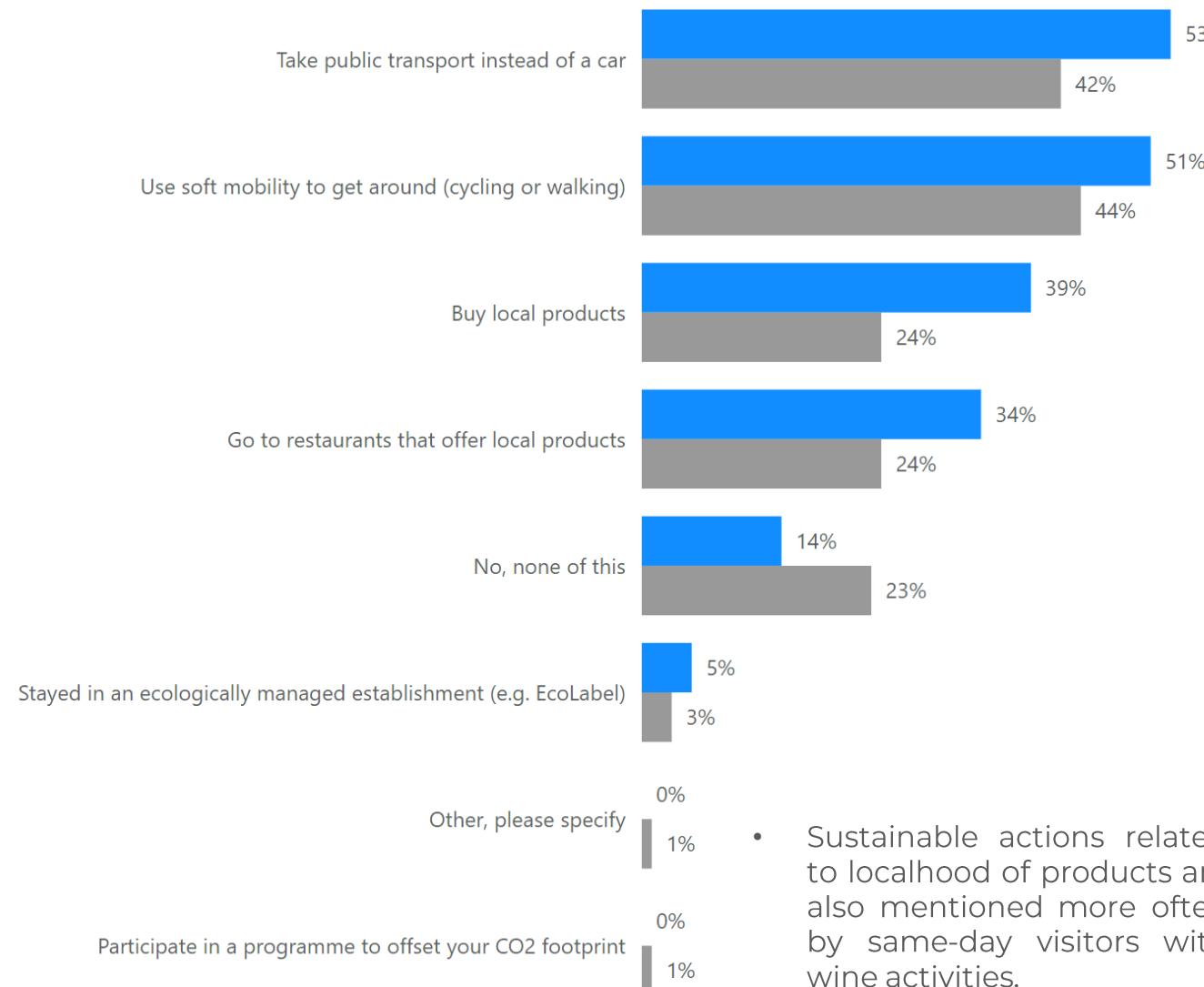
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Sustainable actions during stay

Same-day visitors

● Wine (activity) ● All Inbound

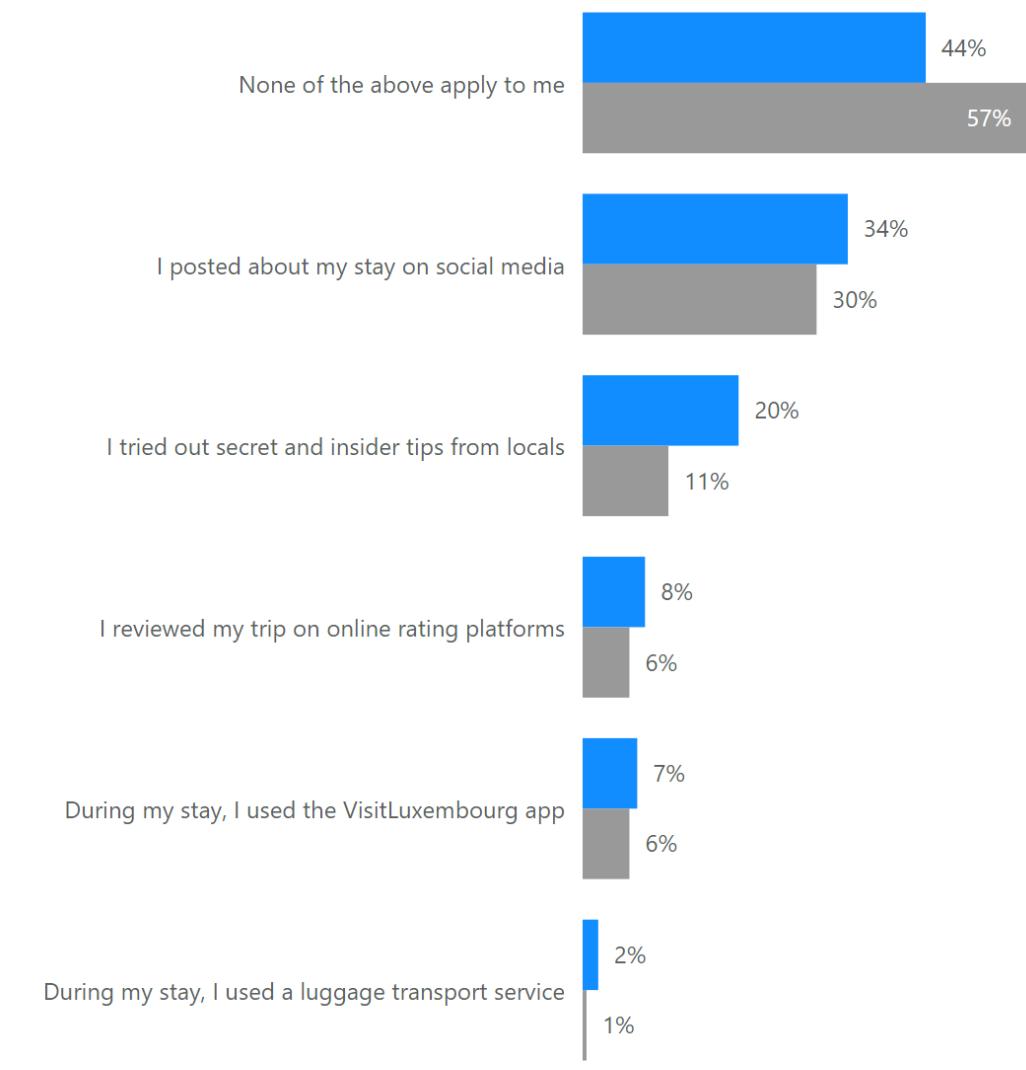


- Sustainable actions related to localhood of products are also mentioned more often by same-day visitors with wine activities.

Services used during stay

Same-day visitors

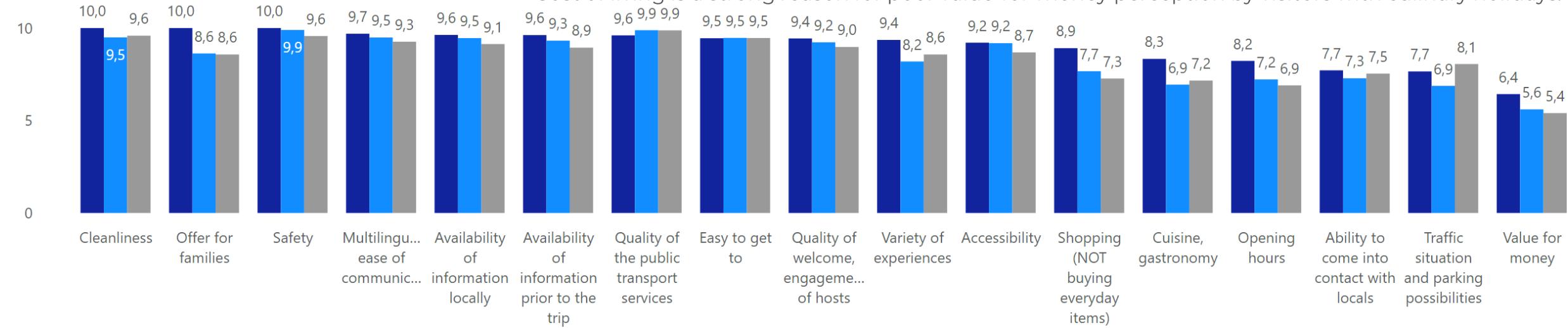
● Wine (activity) ● All Inbound



Satisfaction items

Visitors with overnight

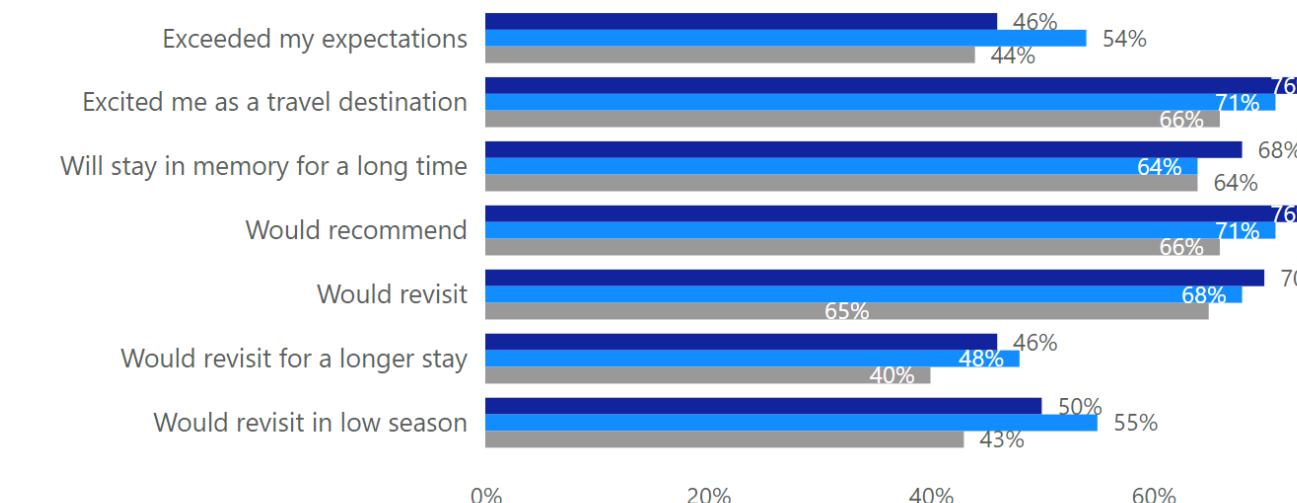
● Culinary (holiday type) ● Wine ● All Inbound



Overall satisfaction - % "strongly agree"

Visitors with overnight

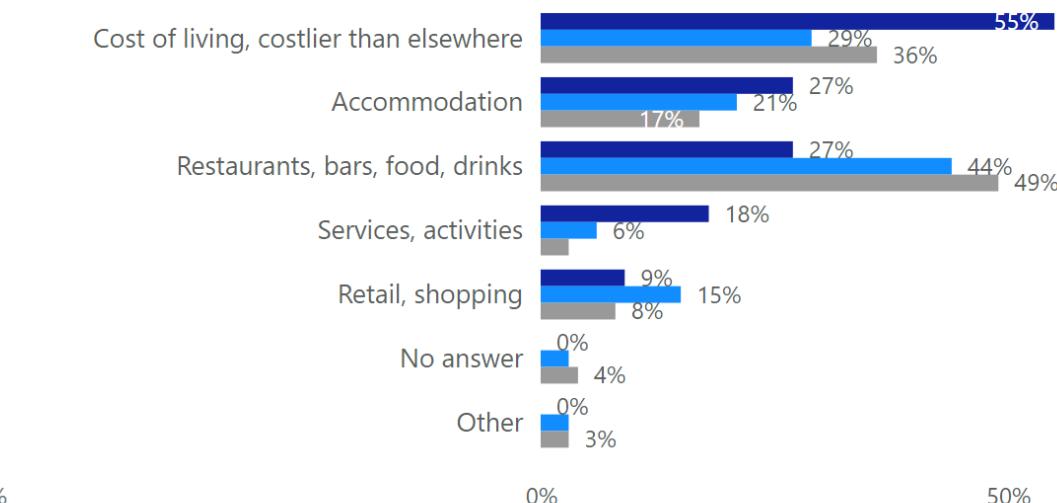
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Reasons for poor value-for-money

Visitors with overnight

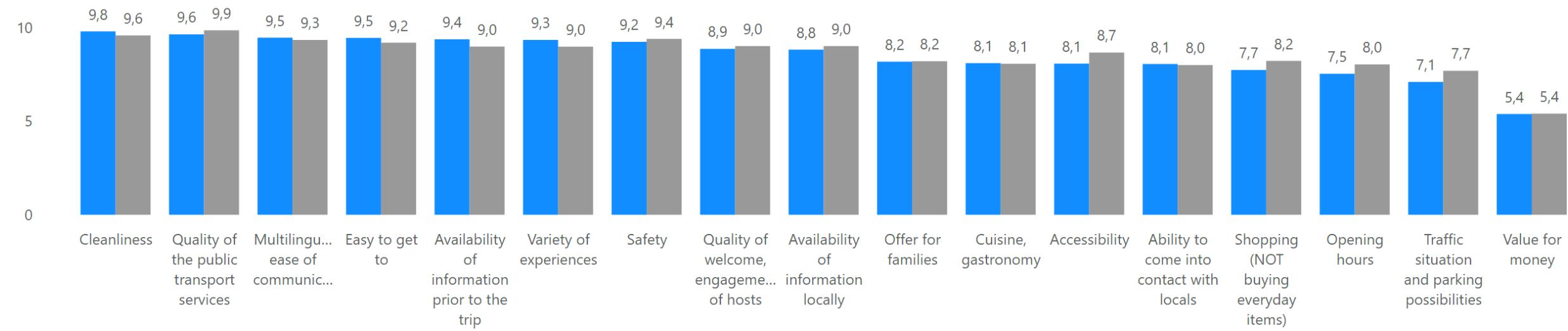
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Satisfaction items

Same-day visitors

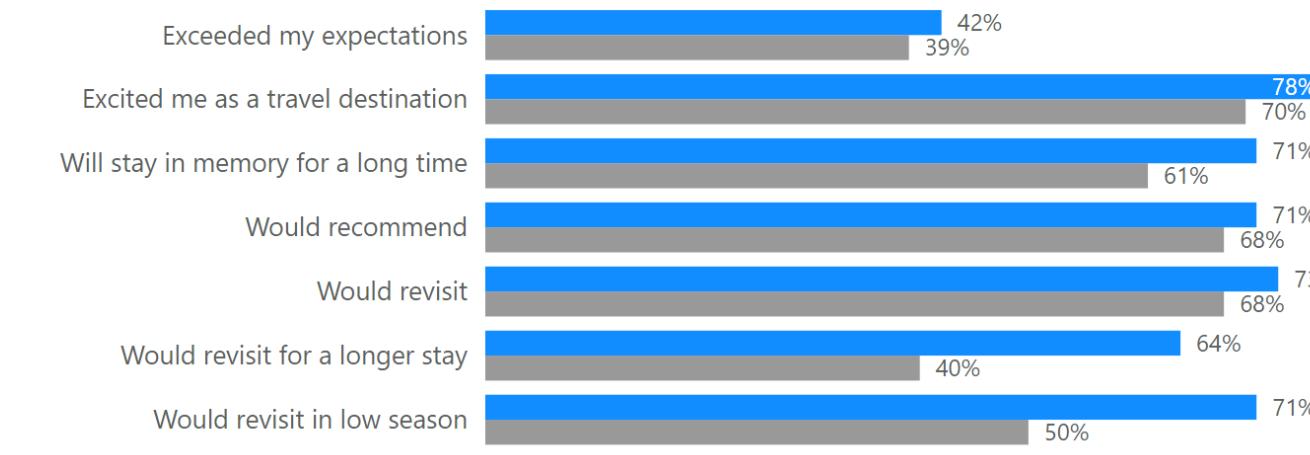
● Wine (activity) ● All Inbound



Overall satisfaction - % "strongly agree"

Same-day visitors

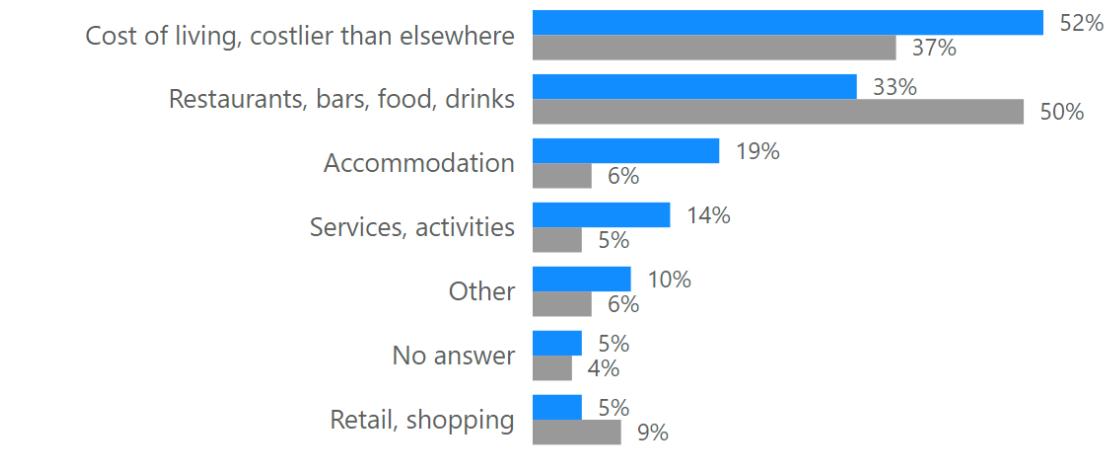
● Wine (activity) ● All Inbound



Reasons for poor value-for-money

Same-day visitors

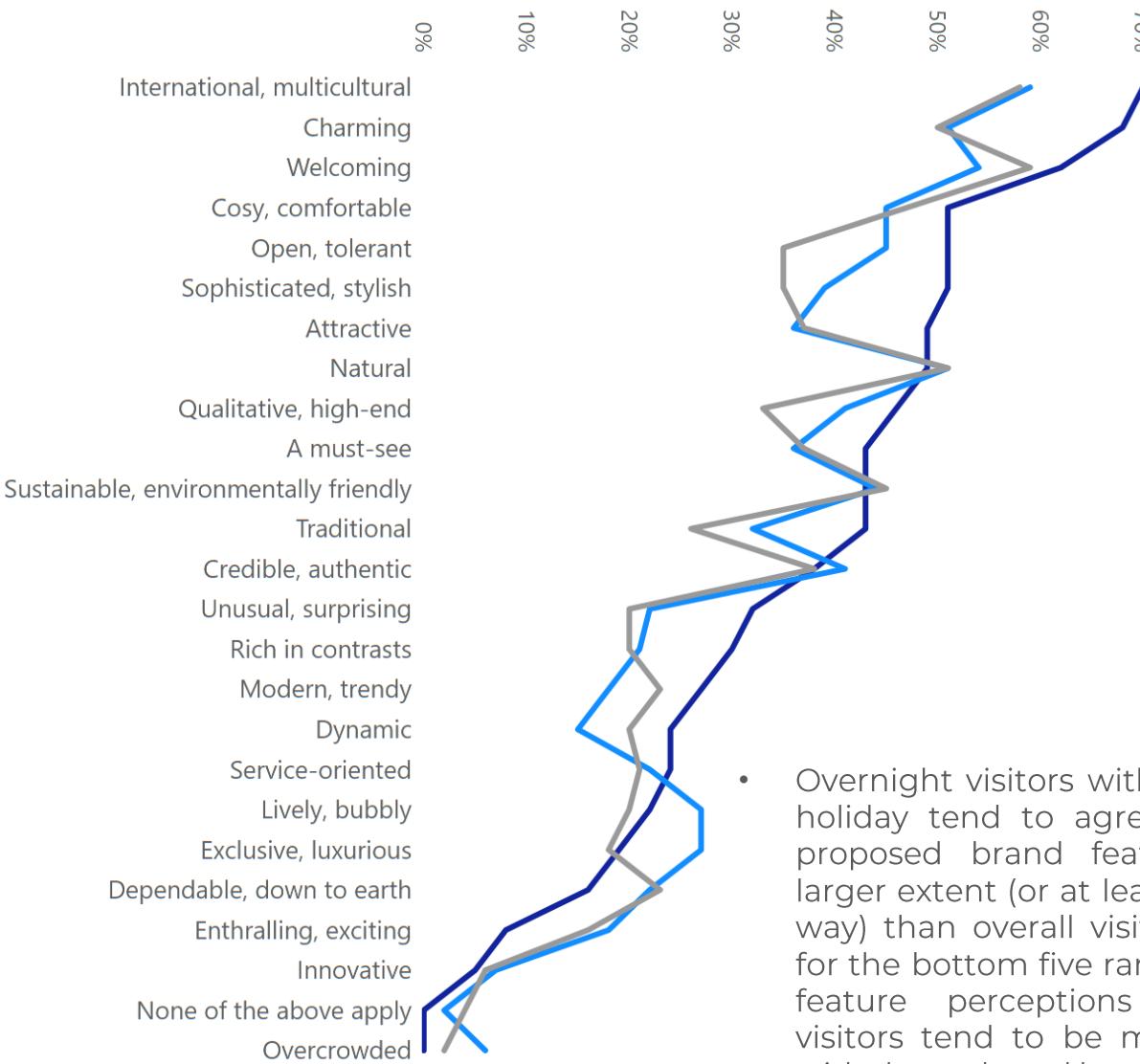
● Wine (activity) ● All Inbound



Brand features

Visitors with overnight

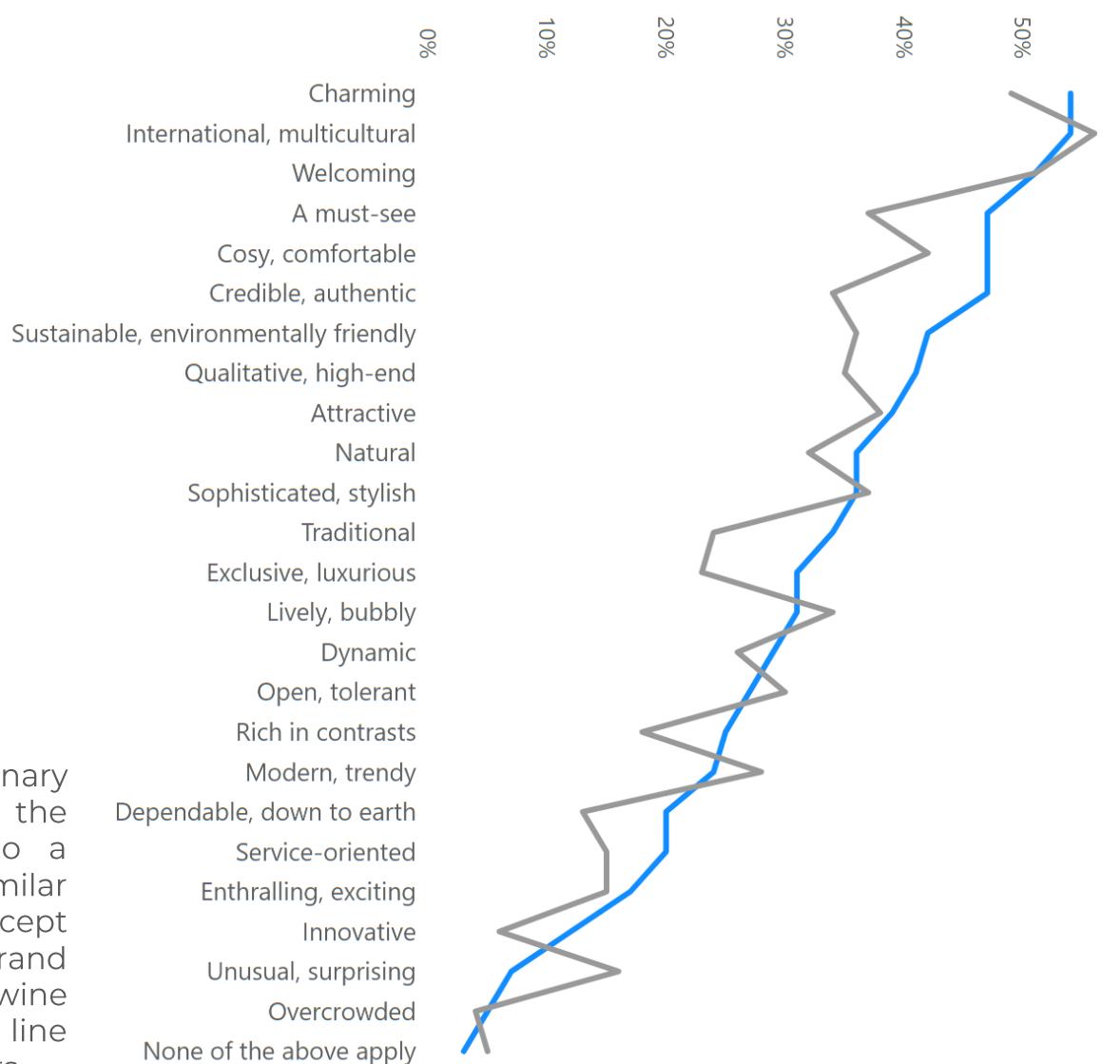
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Brand features

Same-day visitors

● Wine (activity) ● All Inbound

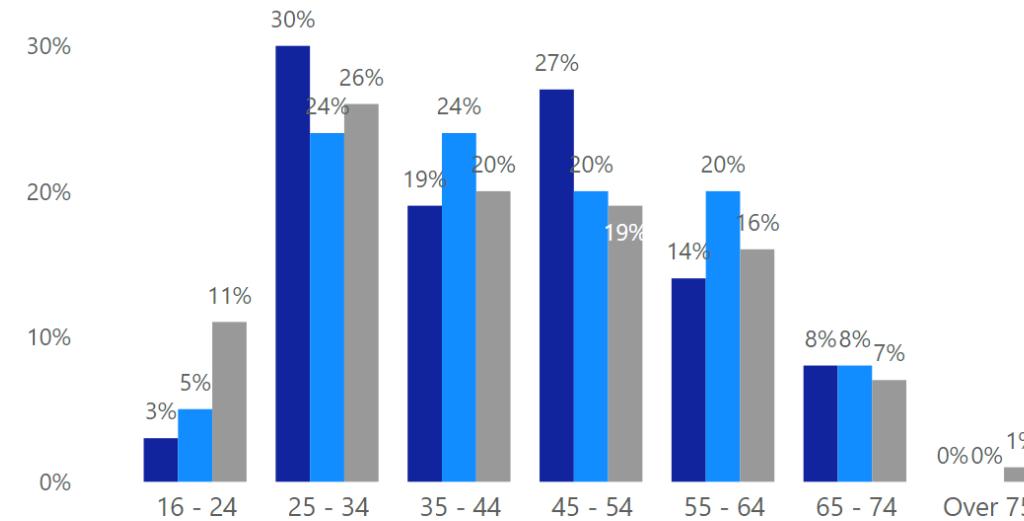


- Overnight visitors with a culinary holiday tend to agree with the proposed brand features to a larger extent (or at least, a similar way) than overall visitors, except for the bottom five ranked. Brand feature perceptions by wine visitors tend to be more in line with those shared by all visitors.

Age

Visitors with overnight

● Culinary (holiday type) ● Wine (activity) ● All Inbound

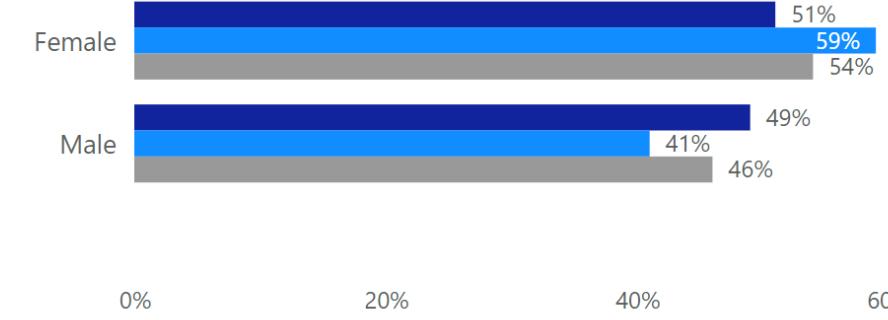


- Culinary visitors show the highest share in the age groups from 25-34 as well as 45-54 years. Those with wine activities tend to be older than overall visitors, indicating larger shares from 35 years on.

Gender

Visitors with overnight

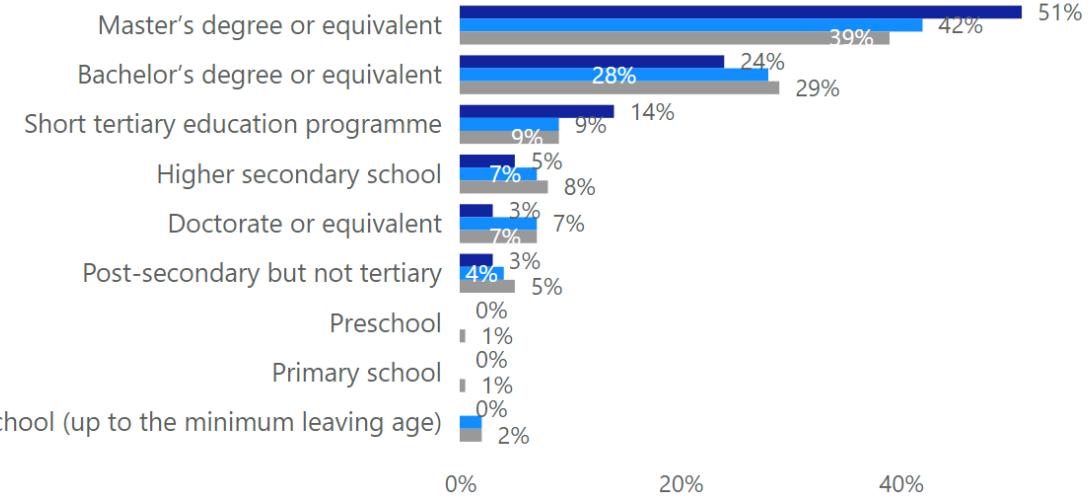
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Education

Visitors with overnight

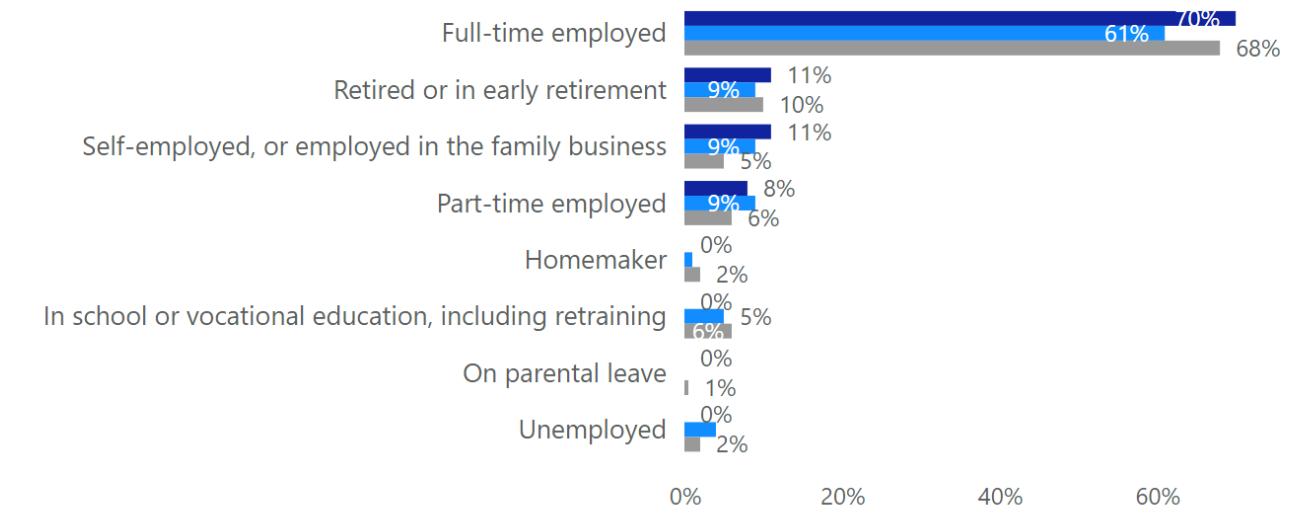
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Employment

Visitors with overnight

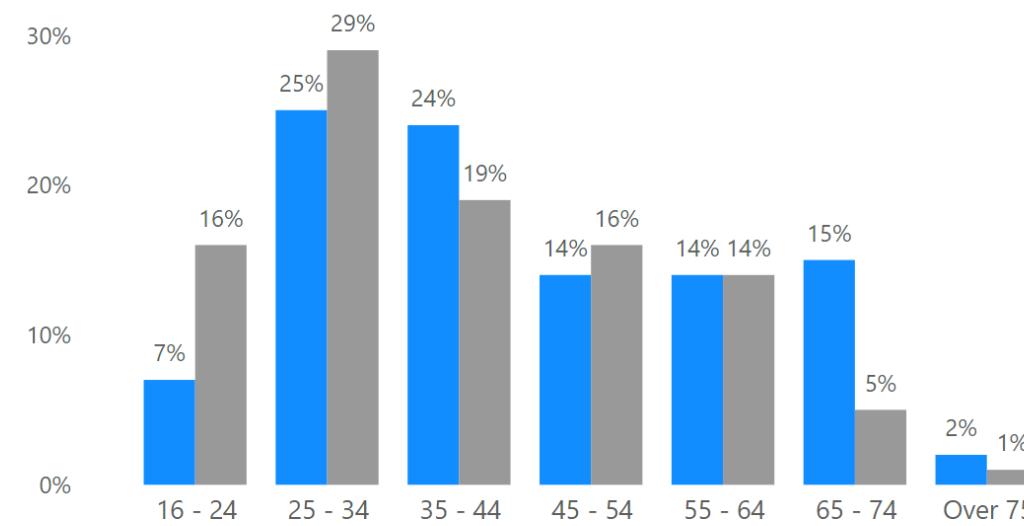
● Culinary (holiday type) ● Wine (activity) ● All Inbound



Age

Same-day visitors

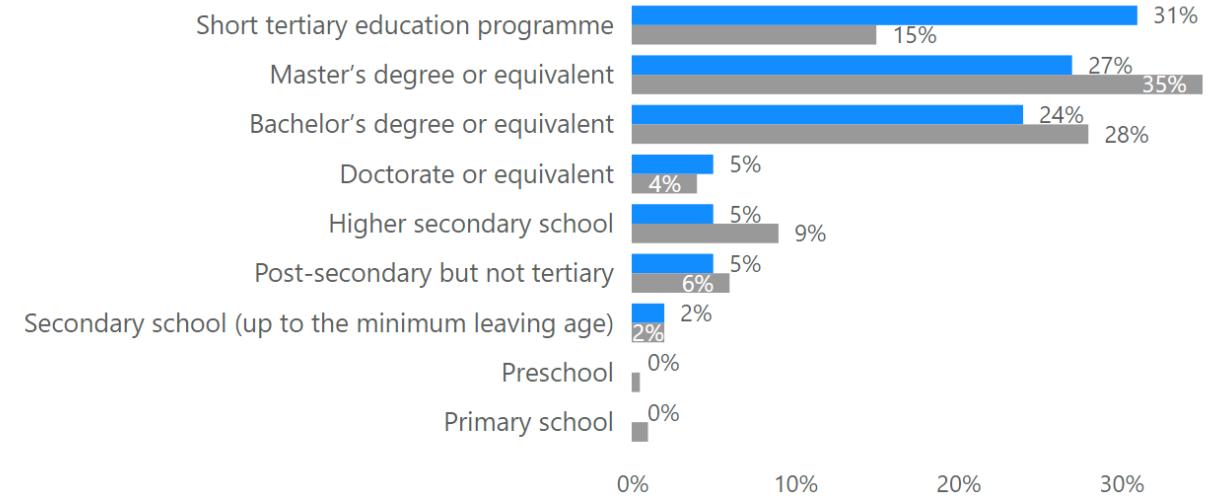
● Wine (activity) ● All Inbound



Education

Same-day visitors

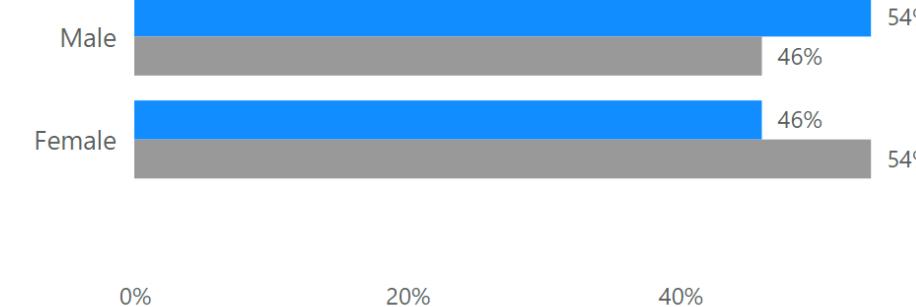
● Wine (activity) ● All Inbound



Gender

Same-day visitors

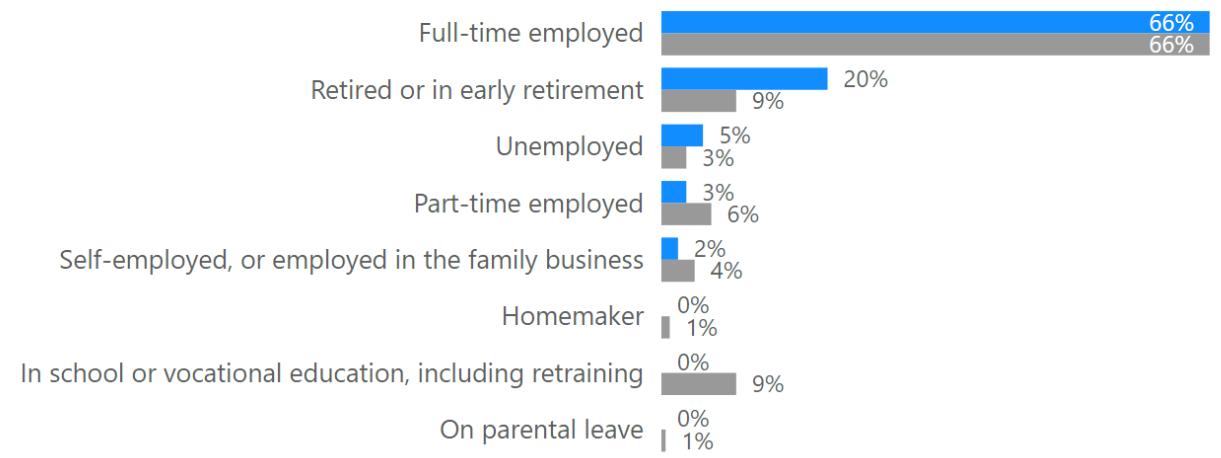
● Wine (activity) ● All Inbound



Employment

Same-day visitors

● Wine (activity) ● All Inbound





Destination Awareness & Growth Potential for Culinary & Wine holiday segments



General theme interest - Culinary

	Rank (*)	Number of themes surveyed	% „very interested“ in theme	% „interested“ in theme	% „interested“, Ø all themes	„Interested“ in theme, pop., mn (**)	
Average Europe	2	33	54%	72%	54%	-	
	1	33	54%	72%	52%	43,0	
	3	33	45%	68%	53%	8,7	
	2	33	54%	71%	54%	4,7	
	1	33	58%	74%	53%	4,8	
	3	33	49%	71%	51%	5,8	
	1	33	49%	71%	55%	33,4	
	2	33	49%	72%	53%	34,4	
	2	38	54%	74%	57%	31,7	
	1	38	51%	74%	57%	25,7	
	2	24	59%	73%	54%	2,6	
	2	24	50%	70%	51%	2,9	
	2	24	53%	71%	52%	5,1	General interest in the respective themes when going on a holiday % of respondents agreeing.
	1	24	73%	77%	60%	5,8	(*) Rank among all surveyed themes in respective source markets. (**) Aged 18-75.

Luxembourg's perceived theme competence - Culinary



	Rank (*)	Number of themes surveyed	% „Luxembourg very suitable“	% „Lux. very suitable“, Ø all themes	„Luxembourg very suitable“, pop., mn (**)
Average Europe	3	26	34%	24%	-
	2	26	41%	23%	24,8
	8	26	30%	26%	3,8
	3	26	32%	22%	2,1
	1	26	41%	23%	2,7
	6	26	34%	25%	2,8
	8	26	27%	22%	12,8
	3	26	34%	22%	16,5
	8	31	29%	23%	12,5
	8	31	34%	26%	11,9
	2	20	43%	27%	1,5
	3	20	33%	24%	1,4
	1	20	36%	21%	2,6
	4	20	44%	33%	3,3

- The ranking of Luxembourg's perceived theme competence varies to some extent across source markets with Austria and Sweden ranking it the best and the Netherlands, France, Spain and Italy ranking it lowest.

- Overall, the perceived theme competence is still fairly high as all source markets rank it in the upper half.

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

(*) Rank among all surveyed themes in respective source markets.

(**) Aged 18-75.

n.b.: Further information on theme interest and Luxembourg's theme competence, e.g. for past visitors and new potential visitors can be found in LFT's Brand & Potential Study report.

General theme interest vs. Luxembourg's theme competence

Culinary



(Ø 13 European source markets) - LFT target segments

	„Interested in theme“, Rank	Number of themes surveyed	„Luxembourg very suitable“, Rank	Number of themes surveyed
EXP	2	26	3	26
NLA	2	26	6	26
RS	2	26	3	26
SB	2	26	3	26
PS	2	26	3	26
LO	2	26	3	26

- Target segments do not differ much with regard to their general interest in Culinary, and also their association with Luxembourg for this theme (only Nature-Loving Actives rank Luxembourg slightly less suitable for this theme).



General theme interest - Wine

	Rank (*)	Number of themes surveyed	% „very interested“ in theme	% „interested“ in theme	% „interested“, Ø all themes	„Interested“ in theme, pop., mn (**)
Average Europe	22	33	24%	49%	54%	-
	21	33	25%	47%	52%	28,0
	25	33	23%	46%	53%	5,8
	24	33	22%	49%	54%	3,2
	23	33	26%	47%	53%	3,1
	21	33	20%	44%	51%	3,6
	24	33	23%	48%	55%	22,3
	25	33	24%	47%	53%	22,8
	15	24	29%	52%	54%	1,8
	17	24	23%	47%	51%	2,0
	15	24	24%	51%	52%	3,7
	16	24	32%	55%	60%	4,1
	25	38	26%	52%	57%	22,3
	25	38	21%	49%	57%	17,1

- General interest in wine sits in the lower half of the ranking across travel themes, being a more niche theme.

- Relative interest is highest in Portugal and Ireland, followed by the Nordics. It is ranked lowest in the Netherlands and the UK.

General interest in the respective themes when going on a holiday
% of respondents agreeing.

(*) Rank among all surveyed themes in respective source markets.
(**) Aged 18-75.

Luxembourg's perceived theme competence - Wine



	Rank (*)	Number of themes surveyed	% „Luxembourg very suitable“	% „Lux. very suitable“, Ø all themes	„Luxembourg very suitable“, pop., mn (**)	
Average Europe	15	26	21%	24%	-	
	12	26	23%	23%	13,6	
	20	26	19%	26%	2,4	
	15	26	18%	22%	1,2	
	14	26	20%	23%	1,3	
	13	26	24%	25%	2,0	
	19	26	17%	22%	7,8	
	15	26	20%	22%	9,7	
	11	20	25%	27%	0,9	
	11	20	21%	24%	0,9	Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.
	10	20	21%	21%	1,5	(*) Rank among all surveyed themes in respective source markets.
	15	20	26%	33%	1,9	(**) Aged 18-75.
	21	31	20%	23%	8,6	
	19	31	21%	26%	7,2	

n.b.: Further information on theme interest and Luxembourg's theme competence, e.g. for past visitors and new potential visitors can be found in LFT's Brand & Potential Study report.

General theme interest vs. Luxembourg's theme competence

Wine



(Ø 13 European source markets) - LFT target segments

	„Interested in theme“, Rank	Number of themes surveyed	„Luxembourg very suitable“, Rank	Number of themes surveyed
EXP	17	26	15	26
NLA	19	26	14	26
RS	18	26	16	26
SB	16	26	14	26
PS	19	26	16	26
LO	19	26	16	26

- Interest and association with Luxembourg for wine are both highest among Short Breakers. While relatively less interested by wine, Nature-Loving Actives also rate Luxembourg rather suitable for this theme, compared to other target segments.

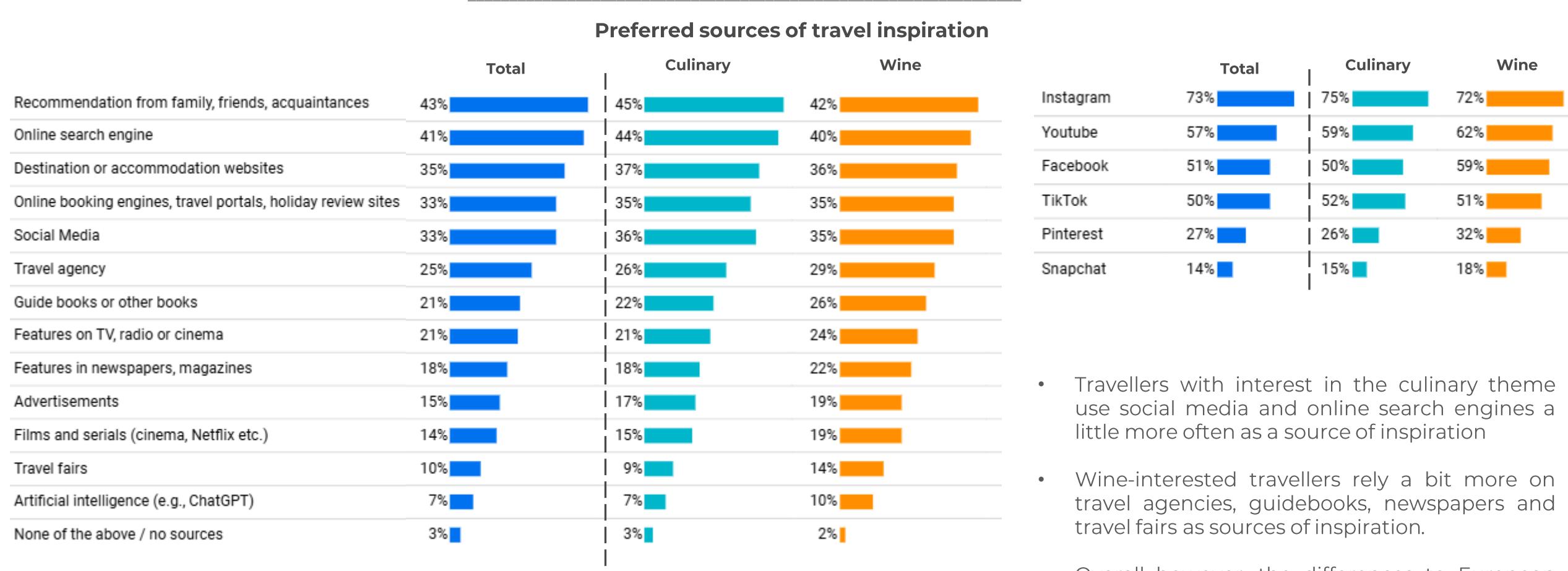


Trip organisation and preferences of Culinary & Wine holiday segments



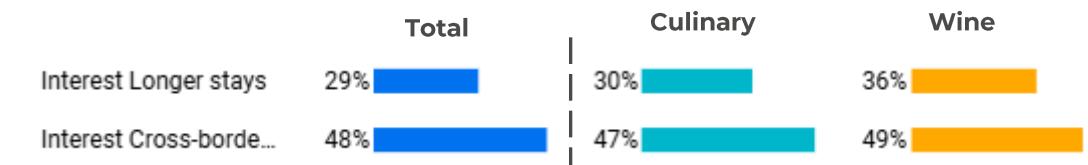
Trip organisation and preferences (1)

— Average European source markets, total vs. travellers interested in culinary & wine



- Travellers with interest in the culinary theme use social media and online search engines a little more often as a source of inspiration
- Wine-interested travellers rely a bit more on travel agencies, guidebooks, newspapers and travel fairs as sources of inspiration.
- Overall however, the differences to European travellers in general remain slight.
- Wine-interested travellers would intend to stay longer if considering visiting Luxembourg within the next 3 years.

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

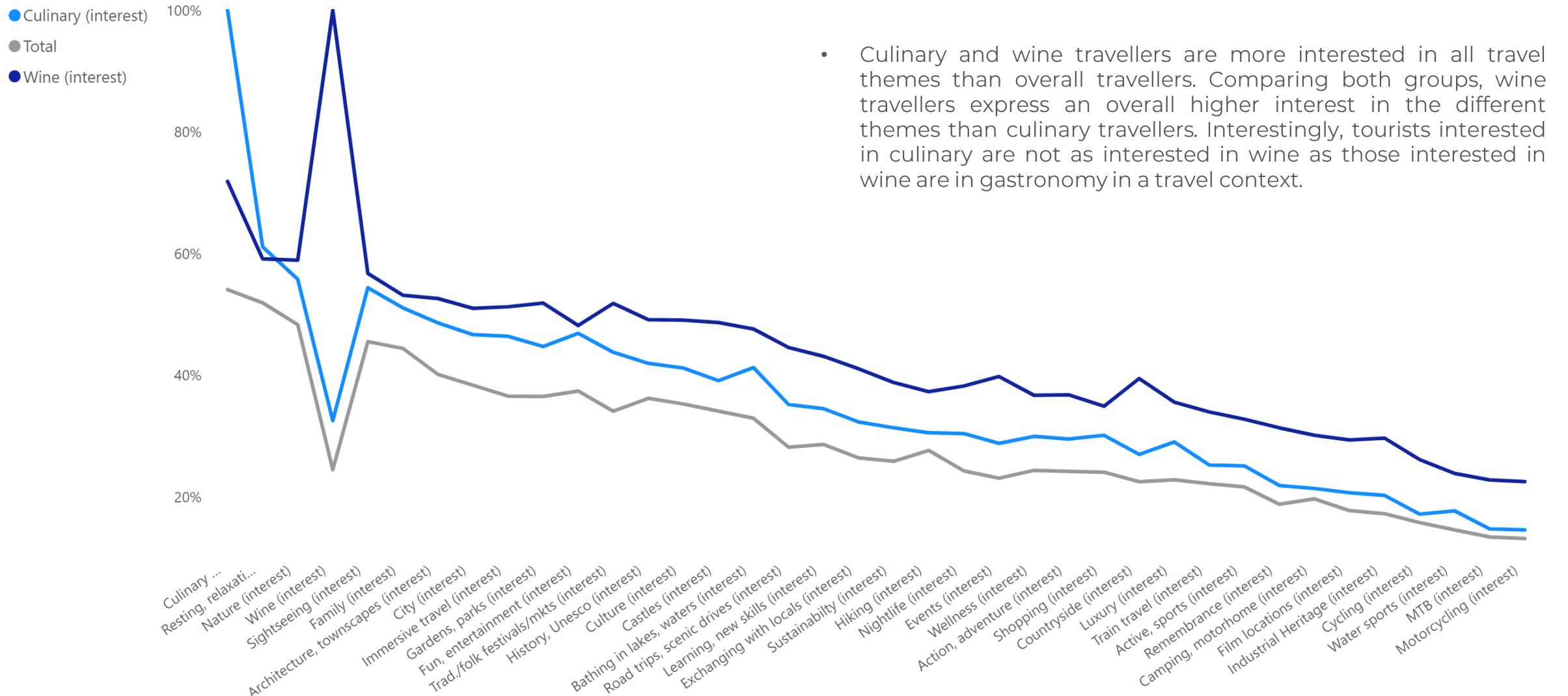


Trip organisation and preferences (2)

— Average European source markets, total vs. travellers interested in culinary & wine



General theme interest (when going on a holiday) : other themes that travellers interested in culinary & wine are also interested in, vs. all travellers

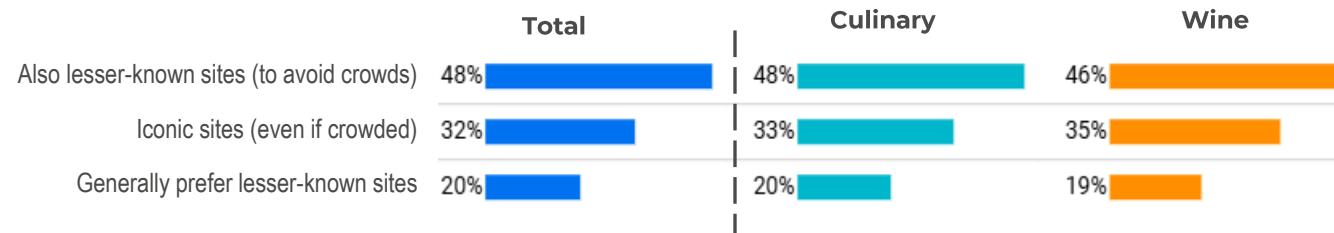




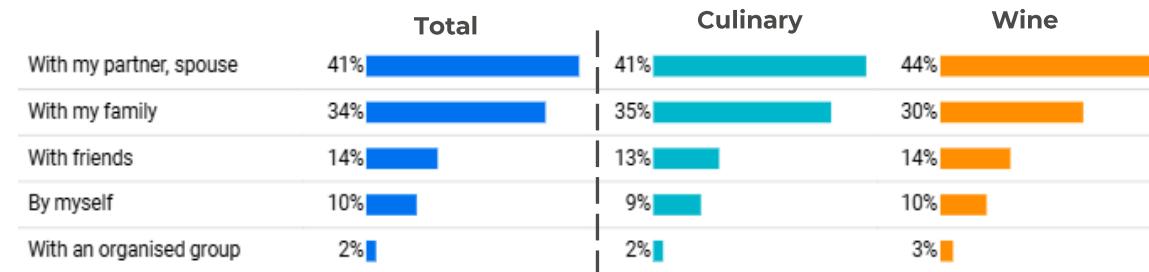
Trip organisation and preferences (3)

— Average European source markets, total vs. travellers interested in culinary & wine

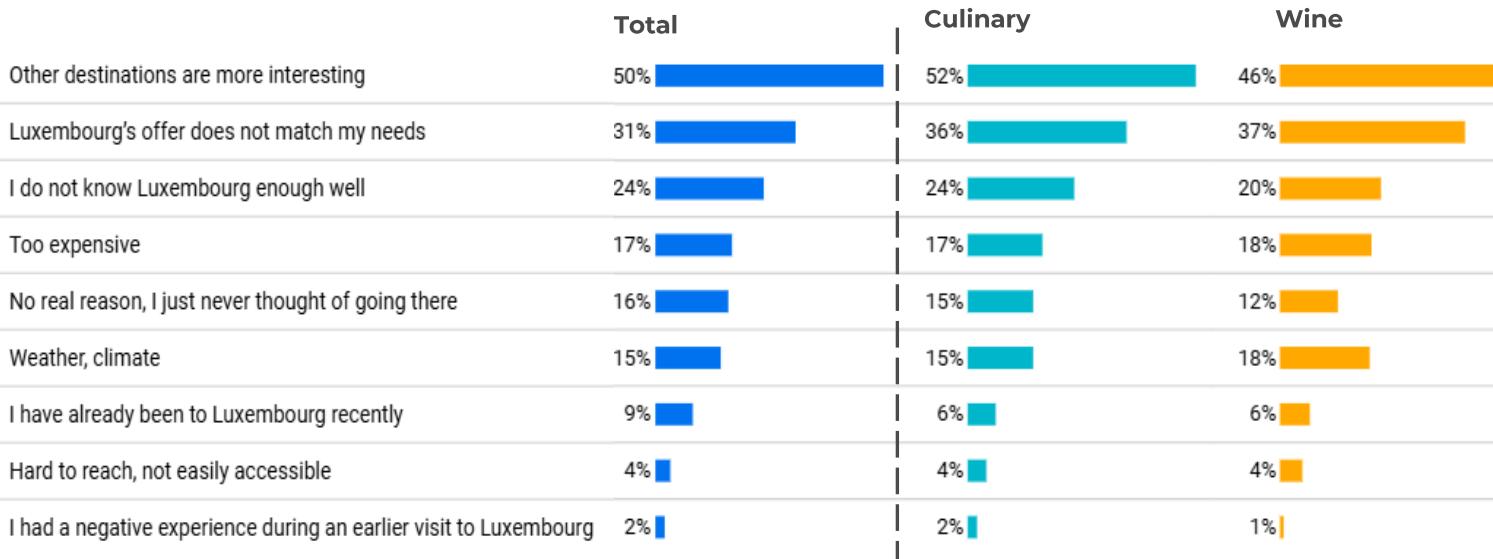
General preference for visiting iconic vs. lesser-known sites



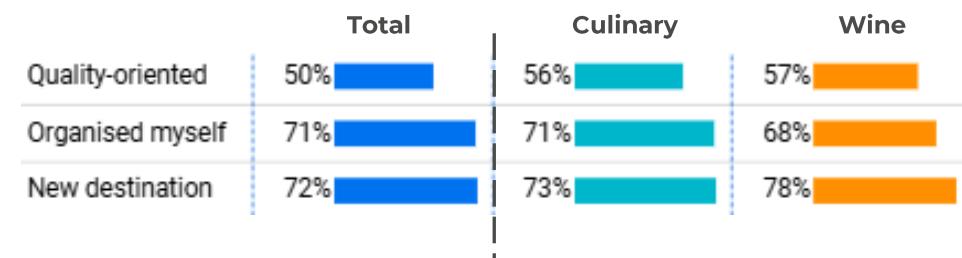
Travel party (*)



Reasons for not considering Luxembourg as a destination



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



- Both groups do not differ much from the overall visitors in regard to general preference for iconic vs lesser-known sites as well as for their travel party.
- They both mention Luxembourg's non-matching offer more often as a reason not to consider Luxembourg.
- They also yield a higher share of quality-oriented visitors.

(*) During last outbound holiday trip .

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

(*) During last outbound holiday trip .

Source: LFT Brand & Potential Study, 2024.



Your contact

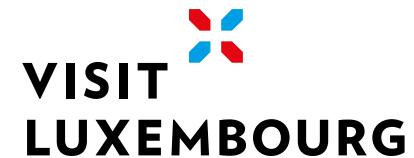


Alain Krier

Head of Insights & Strategy

T. +352 42 82 82 36

alain.krier@LfT.lu



Luxembourg for Tourism GIE

6, rue Antoine de Saint-Exupéry
L-1432 Luxembourg-Kirchberg

www.visitluxembourg.com