

Global Talent Target Market Perception Research

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Luxembourg Ministry of Economy
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Identification of Survey Target Markets



Examine Long List Locations

In-Migration Analysis

Out-Migration Analysis

Visitor Arrivals

Cost of Living Comparisons

Socio Economic & Demographic Data



Develop Short List Target Markets

Context of Research on Talent Mobility

Relevance to Luxembourg



Perception Survey

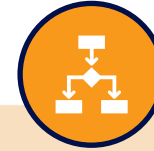
Blind Competitor Assessment with European Peers

Career & Lifestyle Related Factors

Desired Incentives & Programmes

Attractiveness of Luxembourg

Familiarity of Luxembourg



Outcomes

- Understand how world views Luxembourg
- Assess attractiveness versus peers
- Determine most important relocation factors
- Capture insights to inform promotion

Additional Background

The methodology resulted in four target markets for the perception survey analysis. Those were: China, France, India & Portugal.

In each market, an online survey of working-age talent aged 21-64 in target occupations & functions was conducted over a two-week period in June 2024. It was translated into each local language.

All survey respondents had to meet the following criteria: currently employed; working in one of Luxembourg's strategic target sectors (+ financial services); would consider relocation to Europe; has at least a secondary schooling degree or higher.

500 total responses (125 per market) were collected and analyzed.

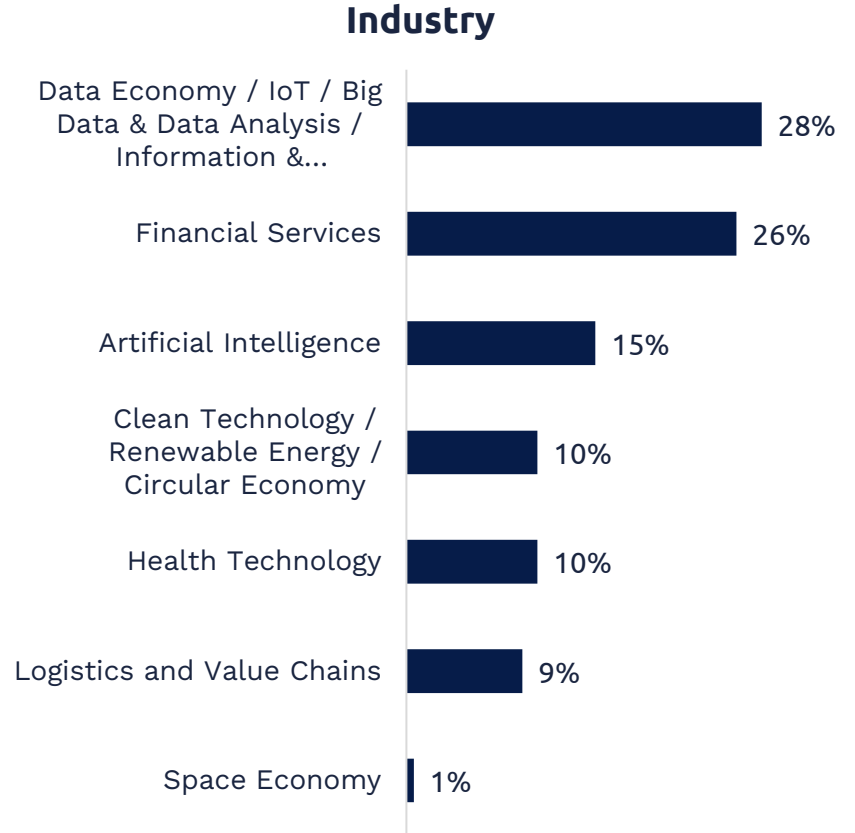
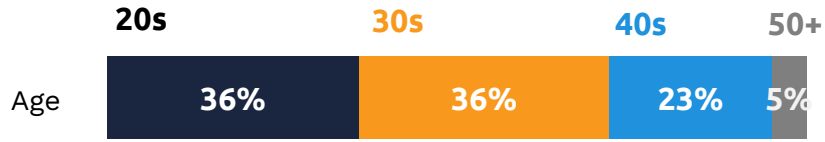
Key Talent Trends Considered in Analysis

- According to *What Talent Wants*, talent is prioritizing safe and secure environments and an improved quality of life, now more than ever. As people have re-evaluated what a good life means, “must have” factors like costs, safety, housing and healthcare are top priorities.
- Not to be undervalued, Europe’s esteemed travel industry plays an important role in promoting the quality of life in a region and attracting talent to relocate there. Approximately 13% of respondents indicated a top trigger for relocating to their new location was visiting for leisure or business purposes and being inspired to move there.
- Job- and career-related factors continue to be equally as important as lifestyle-related factors for talent when considering relocation.
- Salary and work/life balance are of equal importance to talent which supports the theme of the “Great Reflection”, where talent is seeking more from employment than financial benefits alone (although it is still obviously very much part of the consideration).
- Reaching prospective candidates is a digital-first journey. Talent reports that internet research as the No. 1 source of information informing their relocation decision.



Respondent Profile

Respondent Demographics (N=500)



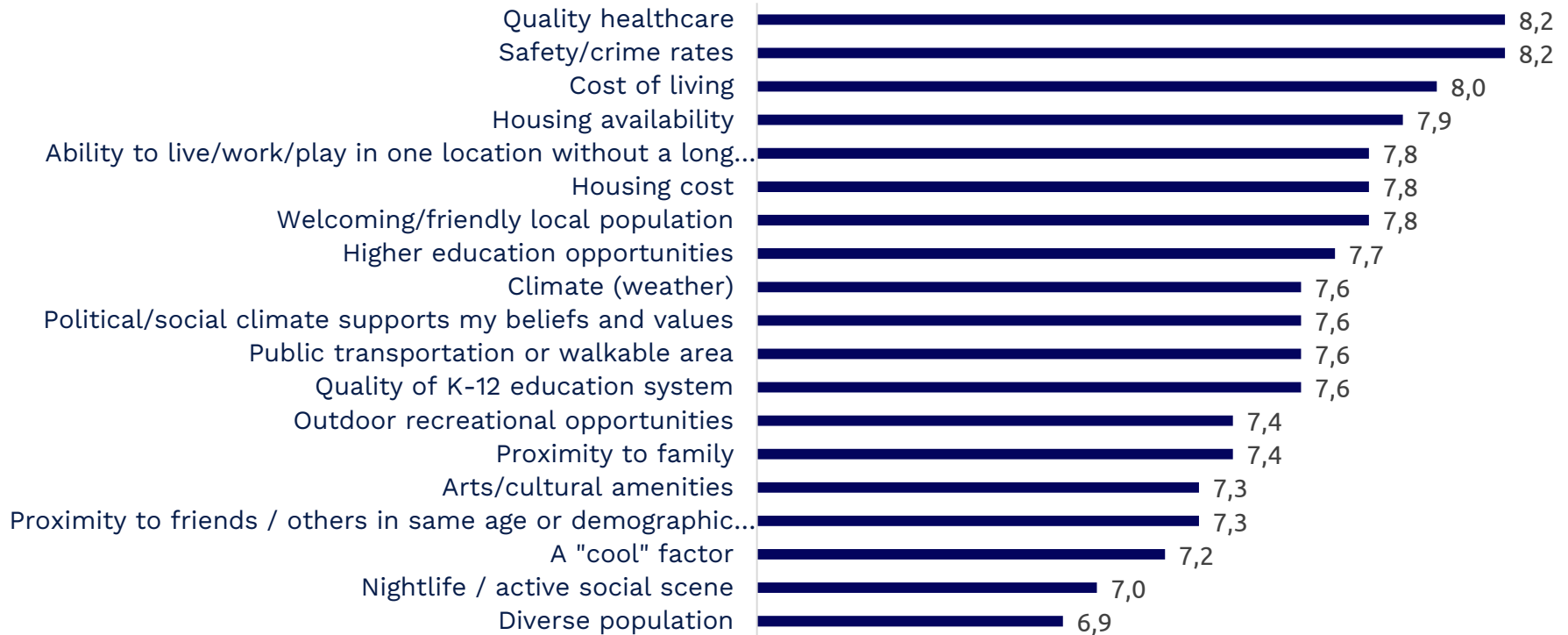


Talents' “Path to Purchase”

Key Findings on Talent's "Path to Purchase"

- Personal safety and security are top priorities for talent when considering relocation. Access to healthcare and safety/security are the most important considerations, followed by other practical factors including the cost of living, the cost of housing, and housing availability. India and China both ranked "welcoming/friendly population" as No. 3 in importance.
- When considering potential job opportunities, compensation is the top factor; however, talent is also looking for good work-life balance, two factors that could be at odds. A competitive salary trumps the top-rated livability factors for respondents
- Priorities do not vary significantly by market. Regardless of current residence, external talent is driven by the possibility of a better standard of living, as evidenced by priority lifestyle and career-related factors (i.e., healthcare, cost-related factors, salary, etc.). 64% of respondents report that improving their standard of living and/or enabling an increase in earning potential is the primary motivator for considering relocation to a European country.
- Currently, Luxembourg is not considered as frequently as other European countries as a top destination for relocating talent with the exception of talent located in Portugal. 18% of total respondents cite Luxembourg as a location they would be interested in relocating to (behind Switzerland, the UK, France, Germany and the Netherlands) however, 30% of Portuguese respondents report Luxembourg as a top location for consideration.
- Housing subsidies or allowances are the incentives of most interest, but only by a very small margin.

Importance of Select Lifestyle Factors



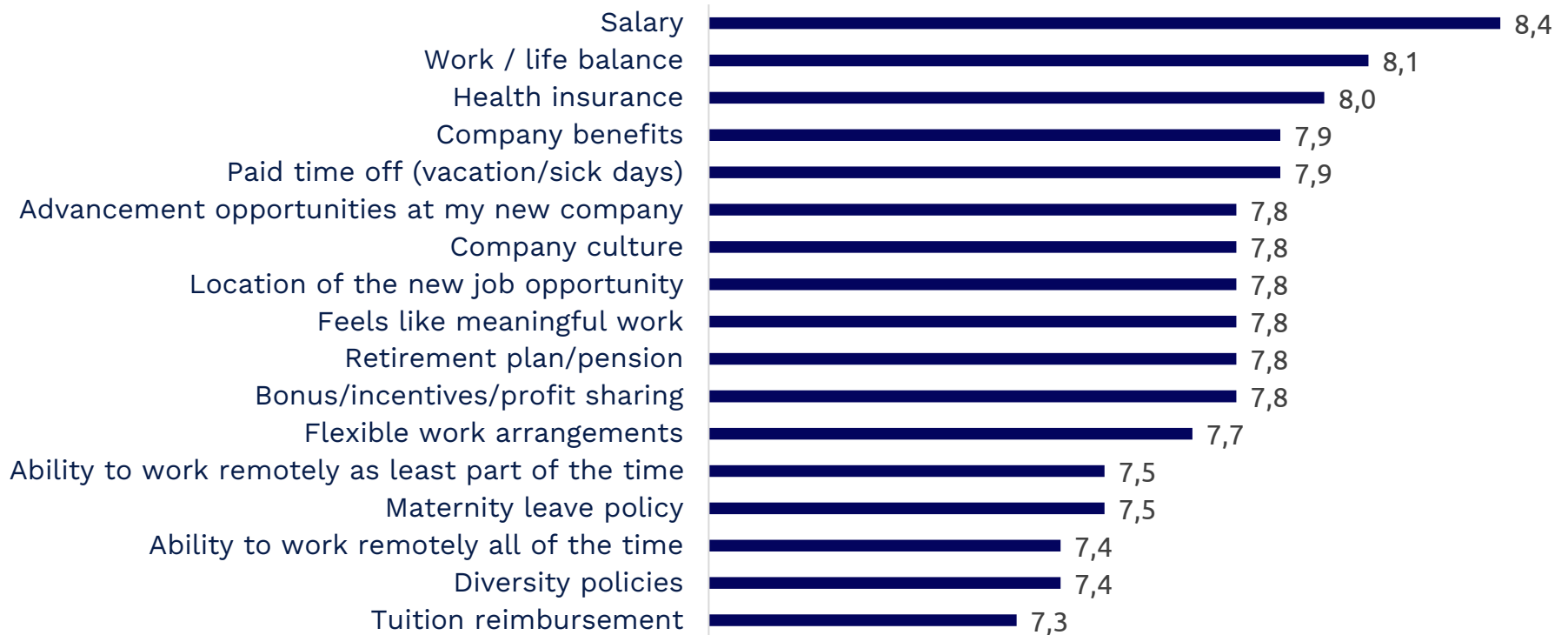
Q. Please rate the importance of the following quality of life factors if you were considering relocating to a different country than where you're currently living. (1=not important, 10=most important)

Most Important Lifestyle Factors, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Quality healthcare (8.4)	Quality healthcare (7.4)	Quality healthcare (8.8)	Quality healthcare (8.4)
		Safety/crime rates (7.4)	Safety/crime rates (8.8)	Safety/crime rates (8.4)
				Cost of living (8.4)
#2	Safety/crime rates (8.3)	Cost of living (7.1)	Welcoming/friendly population (8.6)	Housing cost (8.2)
		Quality of K-12 education (7.1)		
#3	Welcoming/friendly population (8.1)	Housing cost (7.0)	Public transportation /walkable (8.5)	Housing availability (8.1)
			Housing availability (8.5)	
		Live/work/play without long commute (7.0)	Higher education opportunities (8.5)	
			Cost of living (8.5)	

Q. Please rate the importance of the following quality of life factors if you were considering relocating to a different country than where you're currently living. (1=not important, 10=most important)

Importance of Select Career-Related Factors



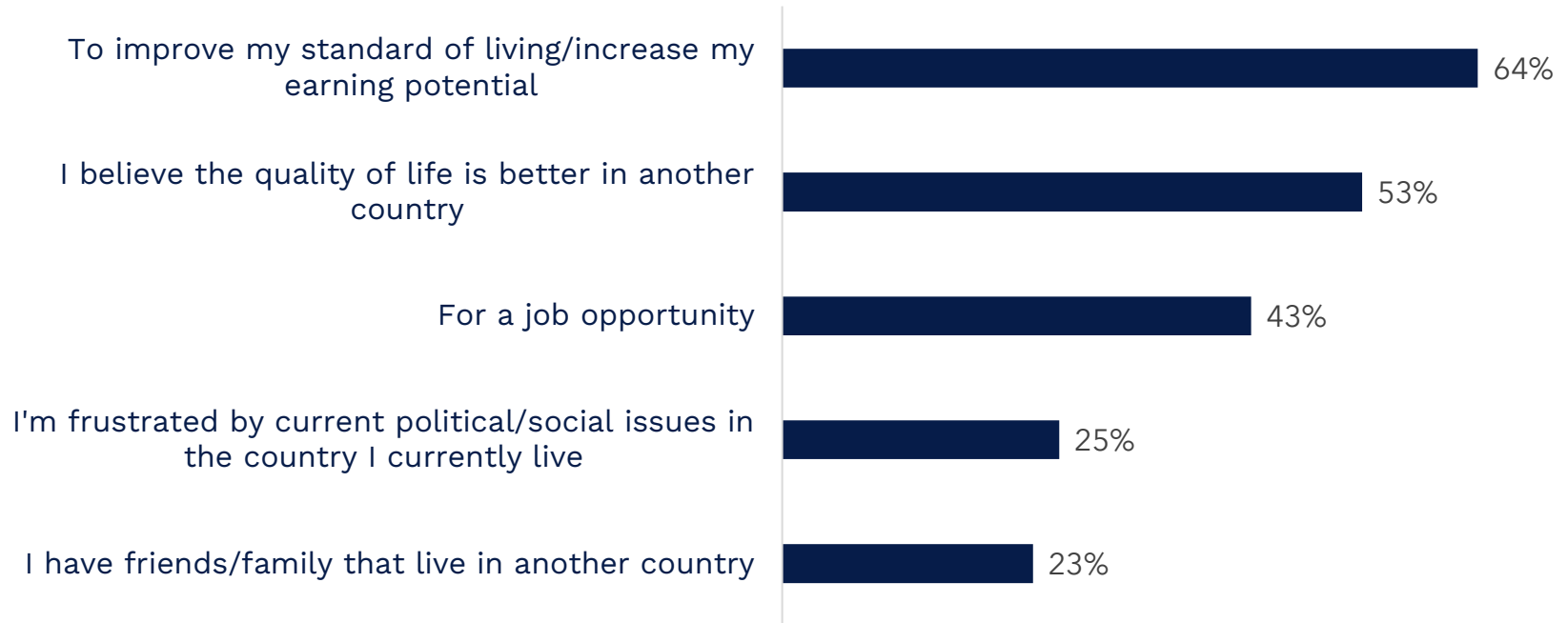
Q. Please rate the following factors on their importance when considering a new job opportunity. (1=not important, 10=most important)

Most Important Career-Related Factors, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Salary (8.5)	Salary (7.3)	Salary (9.0)	Salary (8.7)
#2	Work/life balance (8.4)	Location (7.0)	Company benefits (8.5)	Work/life balance (8.4)
	Health insurance (8.4)		Work/life balance (8.5)	
		Work/life balance (7.0)	Health insurance (8.5)	
		Paid time off (7.0)	Bonus/incentives/profit sharing (8.5)	
#3	Advancement opportunities (8.2)	Meaningful work (6.9)	Meaningful work (8.4)	Advancement opportunities (8.1)
	Company culture (8.2)	Bonus/incentives/profit sharing (6.9)		Company benefits (8.1)
	Meaningful work (8.2)	Health insurance (6.9)		Health insurance (8.1)
			Paid time off (8.1)	

Q. Please rate the following factors on their importance when considering a new job opportunity. (1=not important, 10=most important)

Reasons for Considering a Relocation in Europe



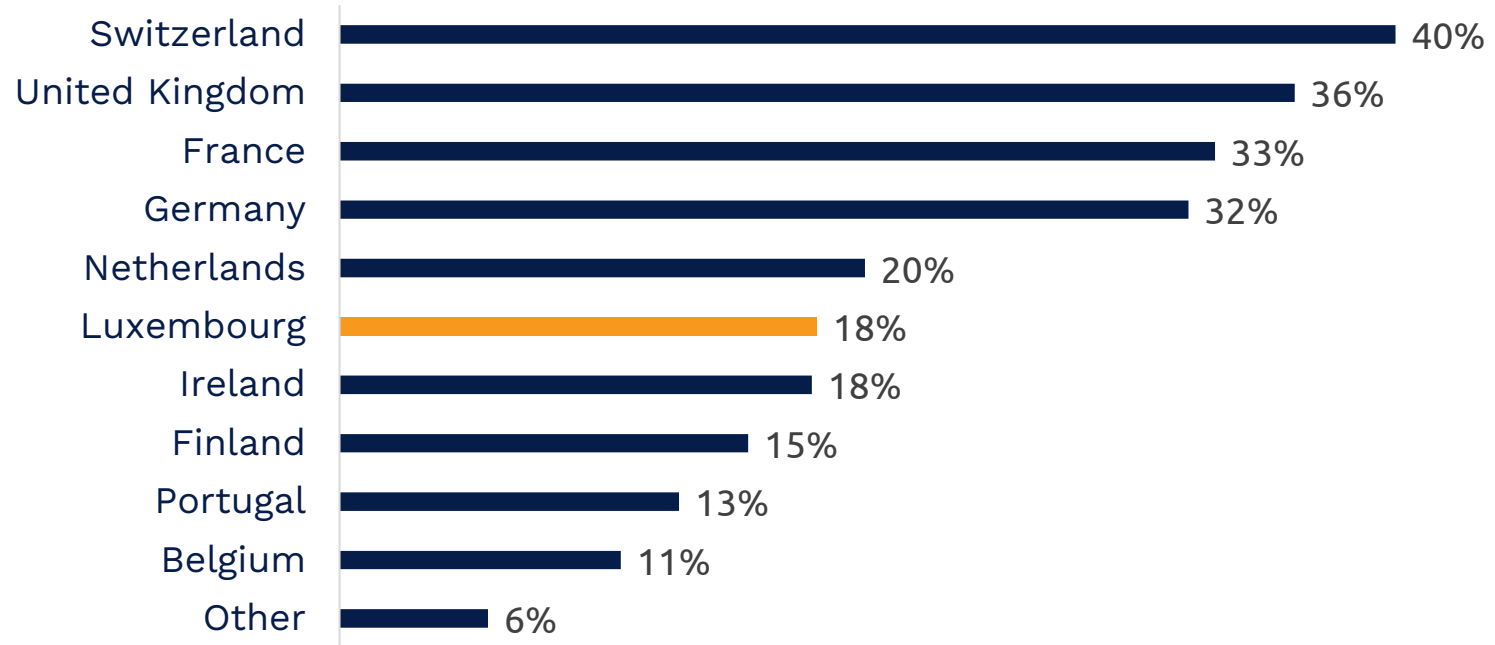
Q. What is the primary reason(s) you would consider moving to another country? (choose all that apply)

Reasons for Considering a Relocation in Europe, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Improve standard of living / increase earning potential (78%)	Quality of life is better in another country (41%)	Improve standard of living / increase earning potential (65%)	Improve standard of living / increase earning potential (73%)
#2	Quality of life is better in another country (59%)	Improve standard of living / increase earning potential (39%)	Quality of life is better in another country (60%)	Quality of life is better in another country (53%)
#3	For a job opportunity (46%)	Frustrated by political/social issues in current country (31%)	For a job opportunity (54%)	For a job opportunity (45%)

Q. What is the primary reason(s) you would consider moving to another country? (choose all that apply)

Interest in Relocating to European Countries

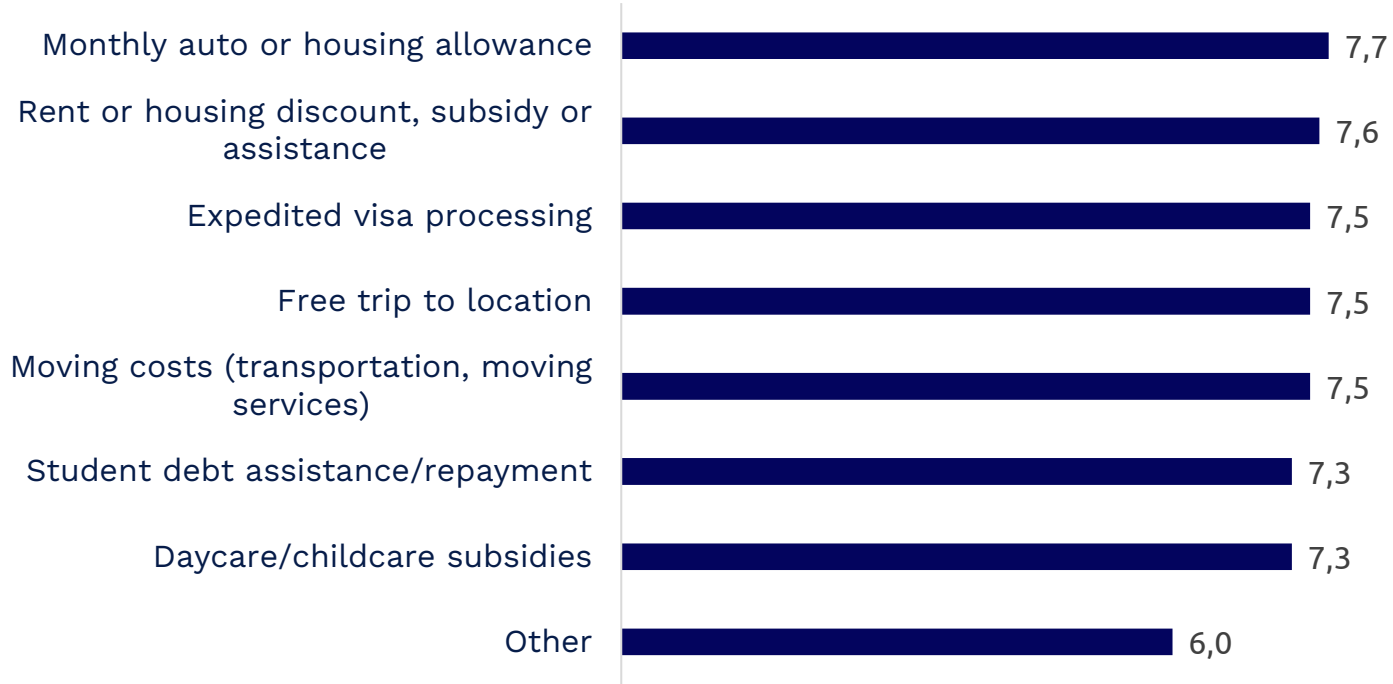


Q. Which European countries would you be most interested in relocating to? (choose all that apply)

Preferred Markets for Relocation, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	United Kingdom (49%)	France (41%)	United Kingdom (56%)	Switzerland (42%)
#2	Switzerland (47%)	Switzerland (27%)	Switzerland (42%)	Luxembourg (30%)
	Germany (47%)		Germany (42%)	
#3	France (46%)	Portugal (18%)	France (31%)	United Kingdom (27%)
	<i>Luxembourg = 18%</i>	<i>Luxembourg = 13%</i>	<i>Luxembourg = 11%</i>	

Helpfulness of Relocation Incentives/Programmes



Q. On a scale of 1 (least helpful) to 10 (most helpful), please rate the following incentives or programmes that an employer or location can offer you when considering relocation.

Most Helpful Relocation Incentives, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Monthly auto/housing allowance (8.0)	Free trip to location (6.6)	Expedited visa processing (8.4)	Rent/housing assistance (8.0)
#2	Rent/housing assistance (7.8)	Expedited visa processing (6.5)	Monthly auto/housing allowance (8.3)	Monthly auto/housing allowance (7.8)
		Monthly auto/housing allowance (6.5)		Moving costs (7.8)
		Daycare/childcare subsidies (6.5)		
#3	Free trip to location (7.7)	Rent/housing assistance (6.4)	Rent/housing assistance (8.2)	Expedited visa processing (7.4)
	Moving costs (7.7)	Student debt assistance/repayment (6.4)		Free trip to location (7.4)

Q. On a scale of 1 (least helpful) to 10 (most helpful), please rate the following incentives or programmes that an employer or location can offer you when considering relocation.



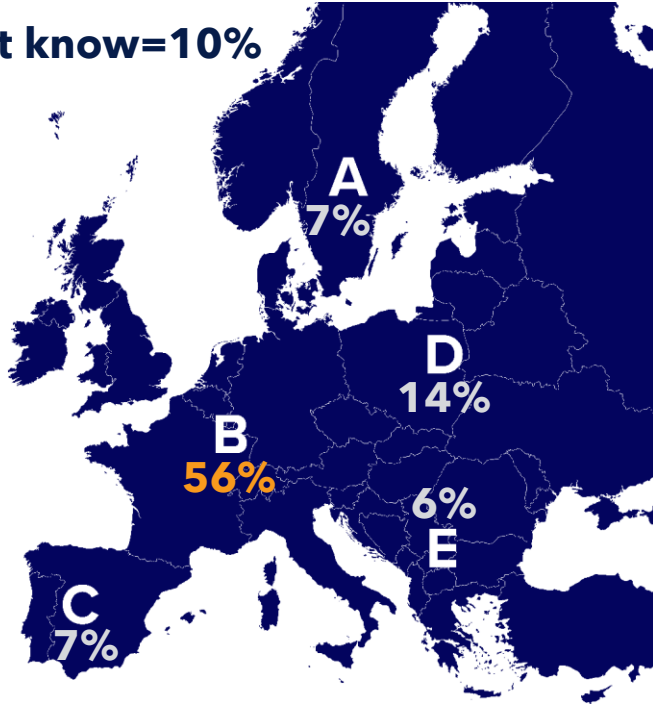
Perceptions of Luxembourg

Key Findings on Talents' Perception of Luxembourg

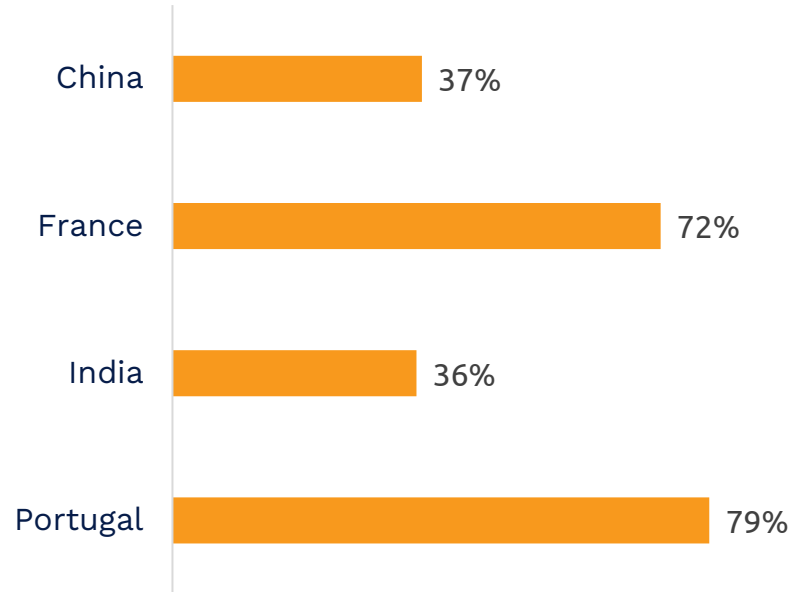
- Messaging and education are needed—specifically in China and India—to raise foundational awareness of Luxembourg, including its location. Slightly more than half of all respondents could correctly identify Luxembourg's location.
- Perceptions of Luxembourg as a place to live, work and visit are moderately positive despite receiving lower scores than competitor countries. Switzerland, Germany and the United Kingdom are consistently in the top three countries on ratings across all three categories.
- Differences exist among the target markets regarding their perceptions of Luxembourg. Overall, the country is perceived most positively as a place to work, with the highest ratings provided by respondents from Portugal, who also provide the highest ratings of Luxembourg as a place to live. Respondents from China are most likely to provide the highest ratings on Portugal as a place to visit. Respondents from France provide the lowest ratings of Luxembourg across all three categories.
- Luxembourg rates well on select factors that are important to talent in relocation decisions including access to healthcare and safety and security. However, it is not perceived as a “cost-effective” location.
- Despite a perceived high cost of living, Luxembourg is also perceived as having competitive salaries and benefits.
- An opportunity exists to grow awareness of the depth and breadth of Luxembourg's top industry sectors.

Familiarity with Luxembourg

Don't know=10%

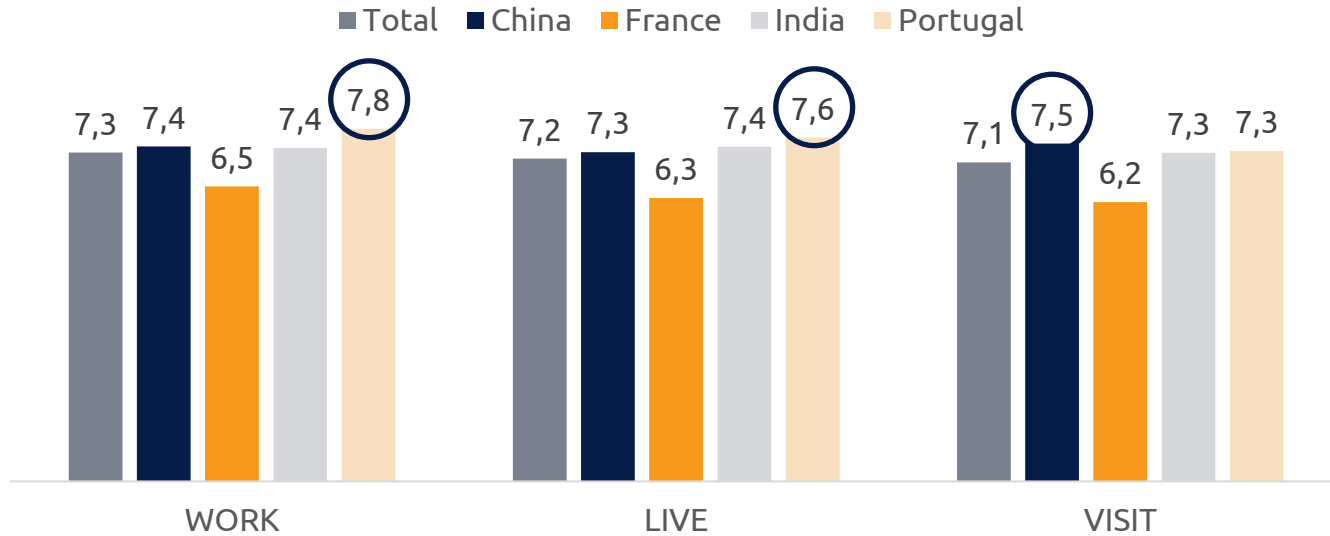


% correctly identifying Luxembourg



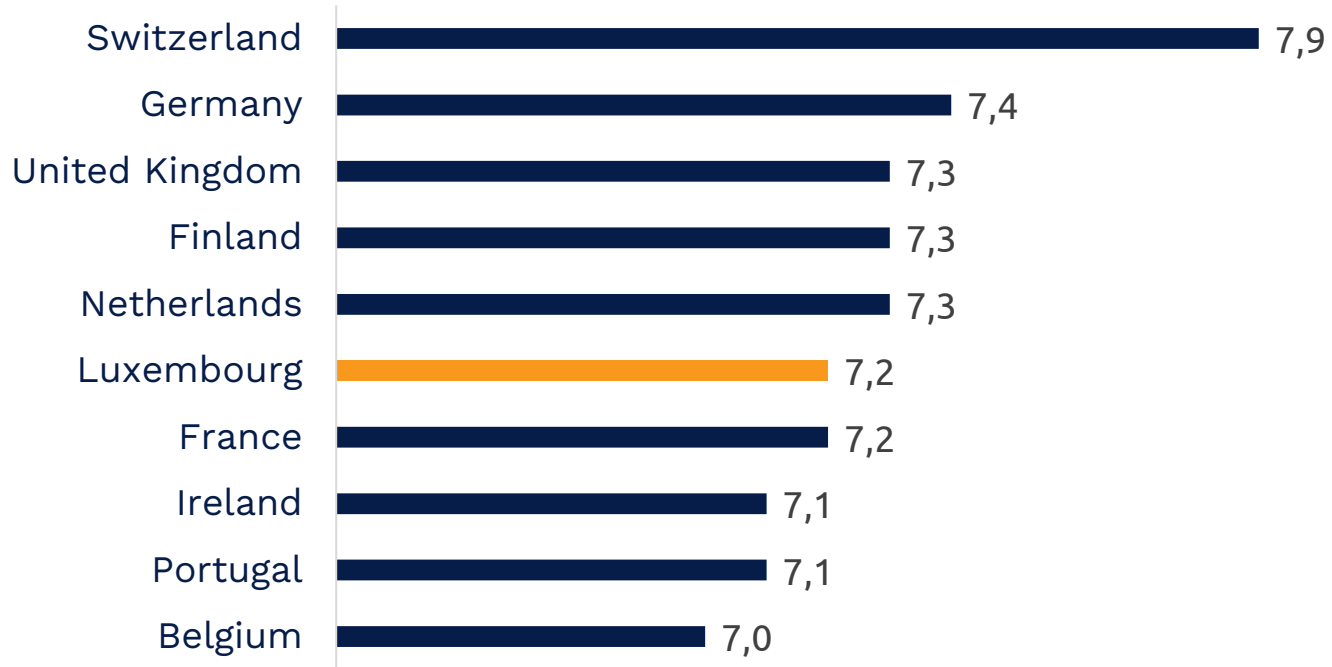
Q. Resisting the urge to look it up, please indicate on the map below where you think Luxembourg is located within Europe.

Luxembourg as a Place to..., Overall and by Target Market



Q. Based on your experience or general perceptions, how would you rate the following countries as a place to work/advance your career? (1=poor, 10=excellent)

Luxembourg as a Place to Live vs. Competitive Set



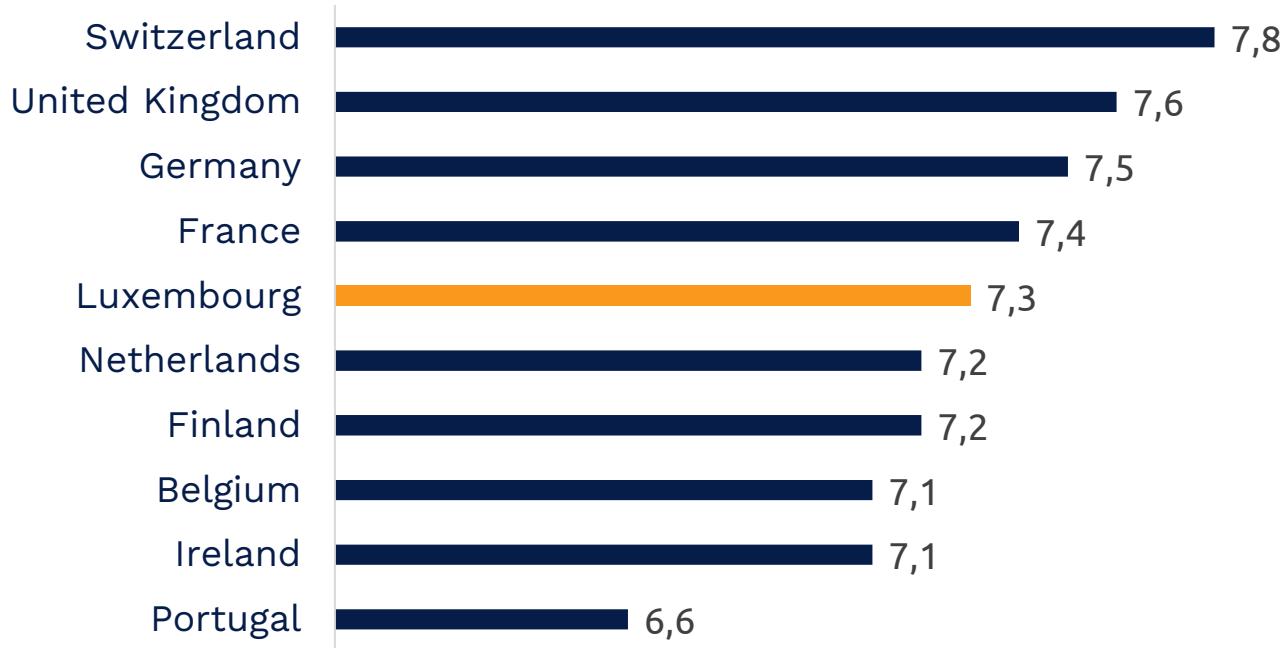
Q. Based on your experience or general perceptions, how would you rate the following countries as a place to live? (1=poor, 10=excellent)

Top Rated Countries to Live, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Switzerland (8.0)	Switzerland (7.3)	Switzerland (8.5)	Switzerland (7.9)
#2	Germany (7.9)	Portugal (6.9)	United Kingdom (8.3)	Luxembourg (7.6)
#3	Netherlands (7.8)	France (6.8)	Germany (8.0)	Germany (7.3)
				Netherlands (7.3)

Q. Based on your experience or general perceptions, how would you rate the following countries as a place to live? (1=poor, 10=excellent)

Luxembourg as a Place to Work vs. Competitive Set



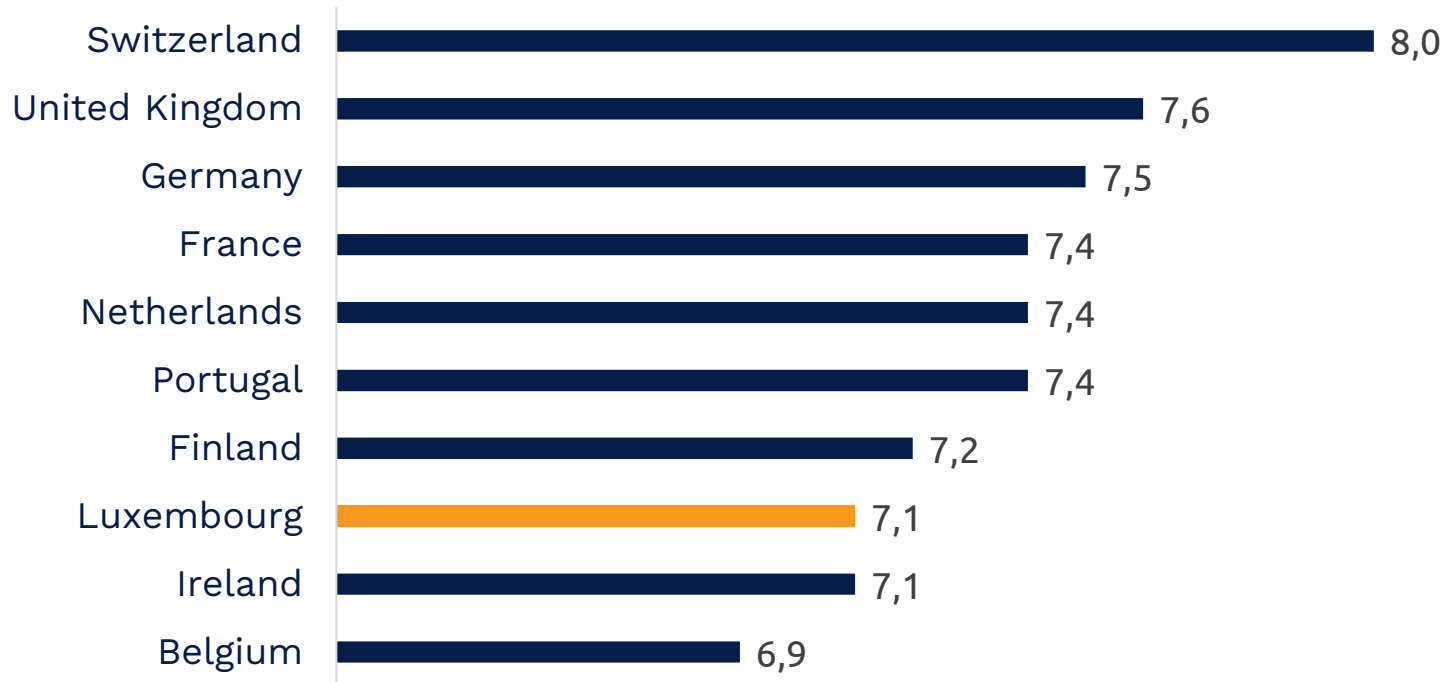
Q. Based on your experience or general perceptions, how would you rate the following countries as a place to work/advance your career? (1=poor, 10=excellent)

Top Rated Countries to Work, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Germany (7.8)	Switzerland (7.3)	United Kingdom (8.6)	Switzerland (8.0)
	United Kingdom (7.8)			
#2	Switzerland (7.7)	France (7.0)	Germany (8.4)	Luxembourg (7.8)
#3	Netherlands (7.6)	Luxembourg (6.5)	Switzerland (8.2)	Germany (7.6)
	France (7.6)	United Kingdom (6.5)		

Q. Based on your experience or general perceptions, how would you rate the following countries as a place to work/advance your career? (1=poor, 10=excellent)

Luxembourg as a Place to Visit vs. Competitive Set



Q. Based on your experience or general perceptions, how would you rate the following countries as a place to visit? (1=poor, 10=excellent)

Top Rated Countries to Visit, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Switzerland (8.0)	France (7.2)	Switzerland (8.9)	Switzerland (8.0)
		Switzerland (7.2)		
		Portugal (7.2)		
#2	Germany (7.9)	United Kingdom (6.9)	United Kingdom (8.3)	Portugal (7.9)
	Netherlands (7.9)			
#3	United Kingdom (7.8)	Netherlands (6.7)	Germany (8.1)	Netherlands (7.4)

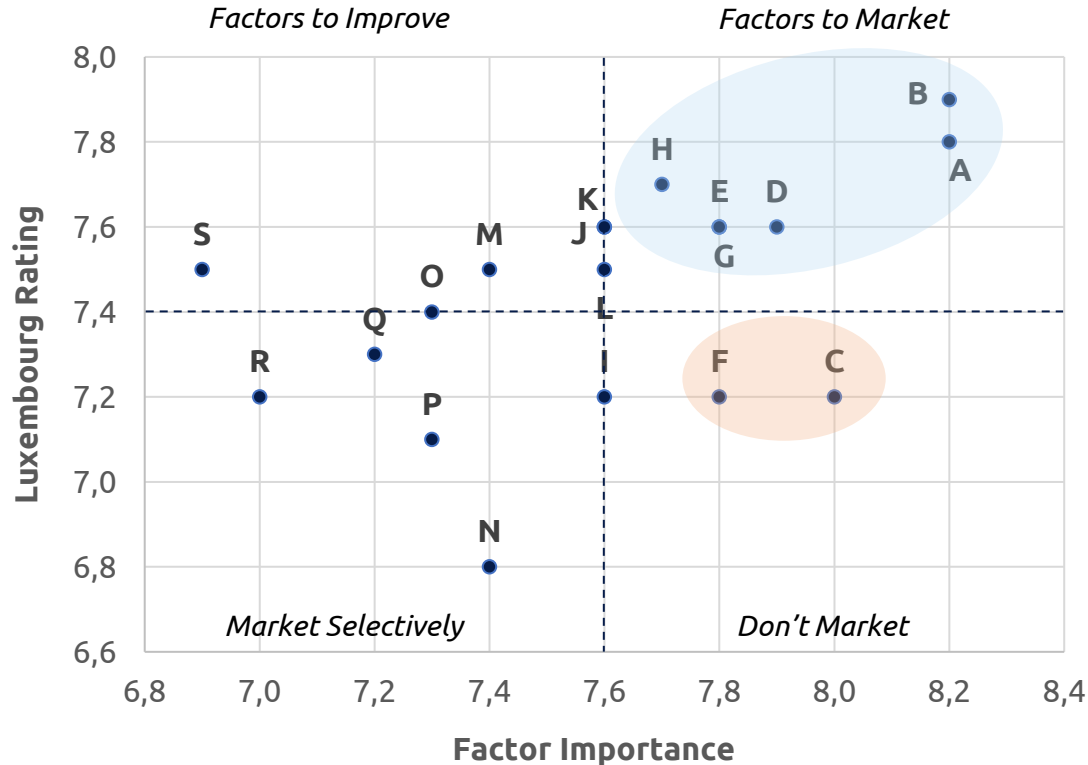
Q. Based on your experience or general perceptions, how would you rate the following countries as a place to visit? (1=poor, 10=excellent)

Rating Luxembourg on Select Lifestyle Factors



Q. While difficult to describe an entire country, to the best of your ability please rate Luxembourg on the following quality of life factors. (1=poor, 10=excellent)

Lifestyle Factors: Importance vs. Luxembourg Ratings



Dotted lines denote overall averages

A	Quality healthcare
B	Safety/crime rates
C	Cost of living
D	Housing availability
E	Ability to live/work/play in one location without a long commute
F	Housing cost
G	Welcoming/friendly local population
H	Higher education opportunities
I	Climate (weather)
J	Political/social climate supports my beliefs and values
K	Public transportation or walkable area
L	Quality of K-12 education system
M	Outdoor recreational opportunities
N	Proximity to family
O	Arts/cultural amenities
P	Proximity to friends / others in same age or demographic group
Q	A "cool" factor
R	Nightlife / active social scene
S	Diverse population

Luxembourg's Top Lifestyle Factors, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Quality healthcare (8.2)	Safety/crime rates (7.1)	Quality healthcare (8.6)	Safety/crime rates (7.9)
	Higher education opportunities (8.2)			
#2	Safety/crime rates (8.1)	Political/social climate matches my beliefs/values (6.9)	Higher education opportunities (8.5)	Quality healthcare (7.7)
		Welcoming/friendly local population (6.9)	Housing availability (8.5)	
			Climate/weather (8.5)	
#3	Housing availability (8.0)	Live/work/play without long commute (6.8)	Safety/crime rates (8.4)	Public transportation/walkable (7.6)
	Public transportation/walkable (8.0)			
	Welcoming/friendly local population (8.0)	Outdoor recreation (6.8)	Quality of K-12 educational system (8.4)	
	Diverse population (8.0)			

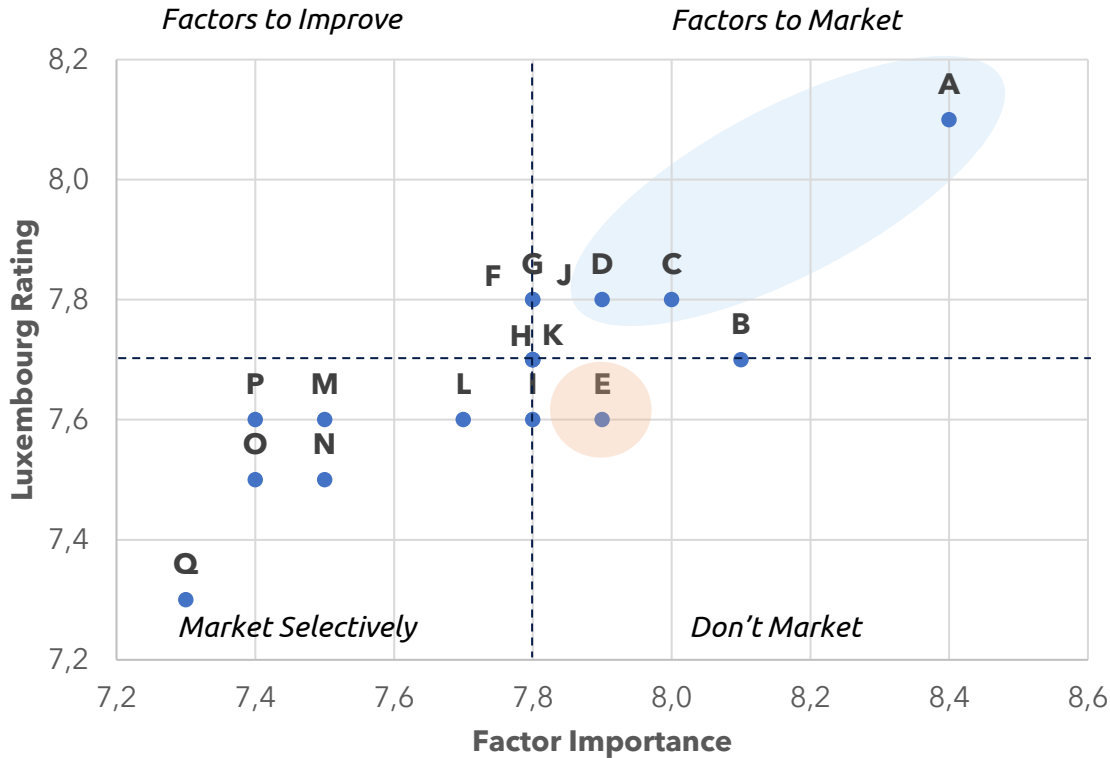
Q. While difficult to describe an entire country, to the best of your ability please rate Luxembourg on the following quality of life factors. (1=poor, 10=excellent)

Rating Luxembourg on Select Career Factors



Q. To the best of your ability, please rate Luxembourg on access to the following career/professional development-related factors. (1=poor, 10=excellent)

Career Factors: Importance vs. Luxembourg Ratings



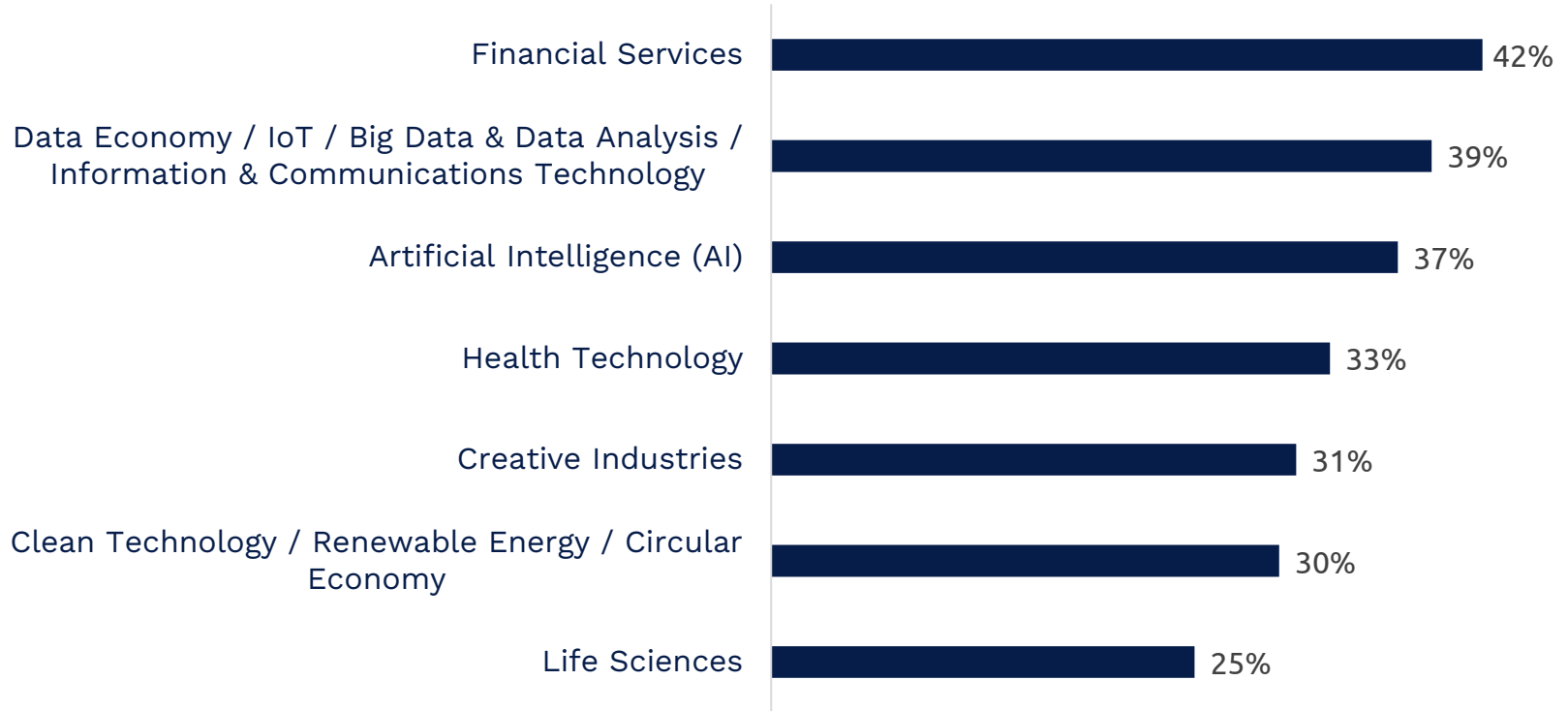
A	Salary
B	Work/life balance
C	Health insurance
D	Company benefits
E	Paid time off (vacation/sick days)
F	Advancement opportunities at my new company
G	Bonus/incentives/profit sharing
H	Company culture
I	Feels like meaningful work
J	Location of the new job opportunity
K	Retirement plan/pension
L	Flexible work arrangements
M	Ability to work remotely as least part of the time
N	Maternity leave policy
O	Ability to work remotely all of the time
P	Diversity policies
Q	Tuition reimbursement

Luxembourg's Top Career Factors, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Health insurance (8.3)	Salary (7.0)	Salary (8.8)	Salary (8.3)
#2	Salary (8.2)	Bonus/incentives/ profit sharing (6.8)	Location (8.6)	Bonus/incentives/ profit sharing (7.9)
	Location (8.2)	Company culture (6.8)		
	Advancement opportunities (8.2)	Diversity policies (6.8)	Health insurance (8.6)	Health insurance (7.9)
	Company culture (8.2)			
#3	Company benefits (8.1)	Company benefits (6.7)	Company benefits (8.5)	Company benefits (7.8)
		Location (6.7)		
	Diversity policies (8.1)	Advancement opportunities (6.7)	Bonus/incentives/ profit sharing (8.5)	
	Retirement plan/ pension (8.1)	Ability to work remotely (6.7)		
	Paid time off (6.7)			

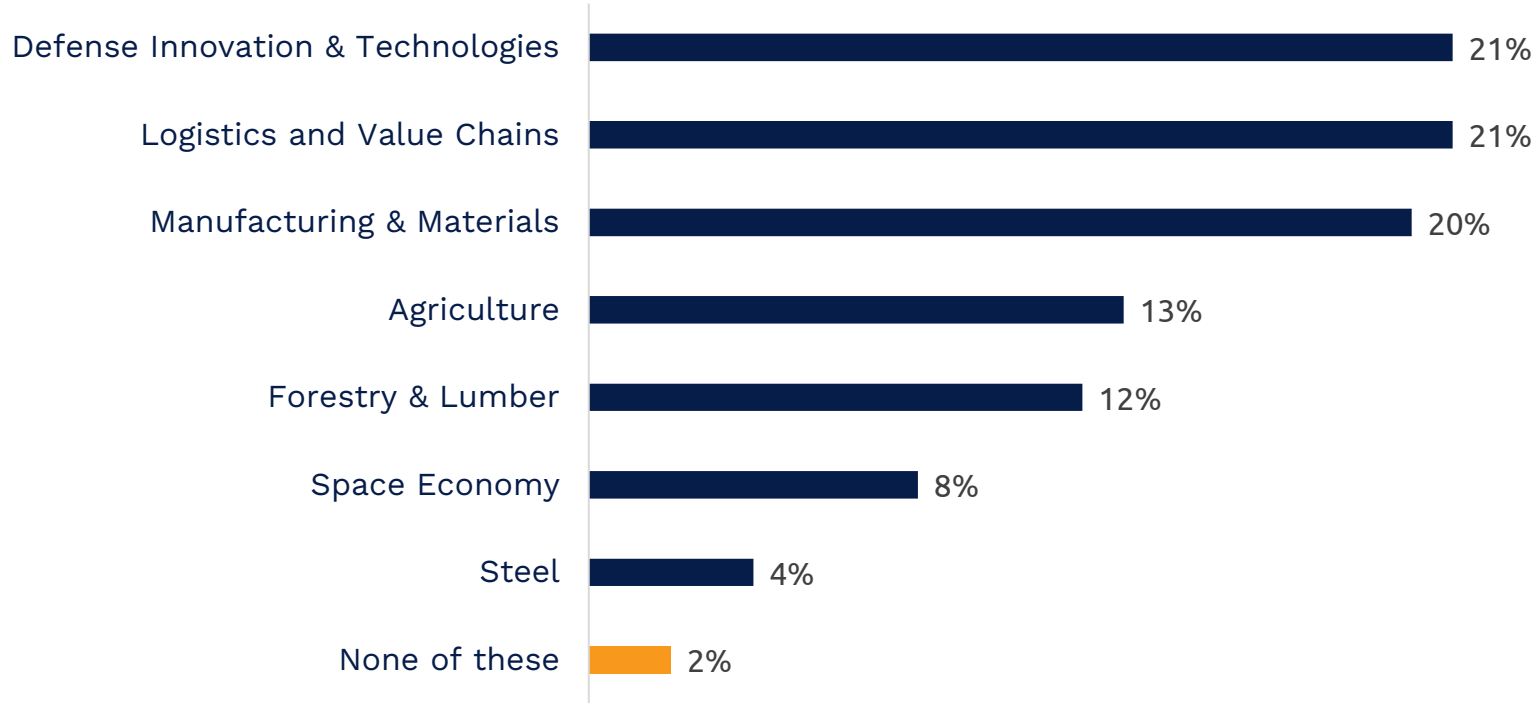
Q. To the best of your ability, please rate Luxembourg on access to the following career/professional development-related factors. (1=poor, 10=excellent)

Industries Associated with Luxembourg (>25%)



Q. Which of the following industries do you associate with Luxembourg? (choose all that apply)

Industries Less Associated with Luxembourg (<25%)



Q. Which of the following industries do you associate with Luxembourg? (choose all that apply)

Industries Associations, by Target Market

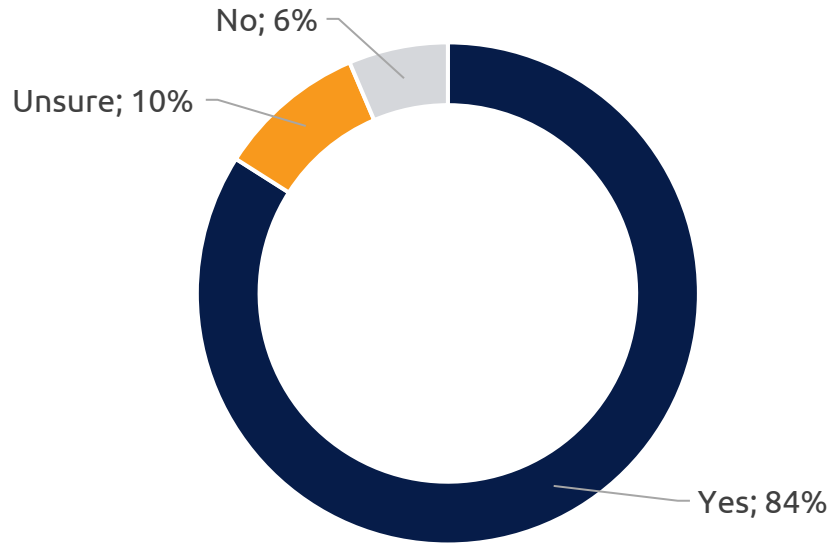
	CHINA	FRANCE	INDIA	PORTUGAL
#1	Data Economy, etc. (50%)	Financial Services (37%)	Artificial Intelligence (41%)	Financial Services (54%)
#2	Artificial Intelligence (45%)	Artificial Intelligence (33%)	Data Economy, etc. (40%)	Health Technology (41%)
#3	Financial Services (44%)	Data Economy, etc. (27%) Clean Tech/Renewable Energy/Circular Economy (27%)	Health Technology (38%)	Creative Industries (40%)

Q. Which of the following industries do you associate with Luxembourg? (choose all that apply)

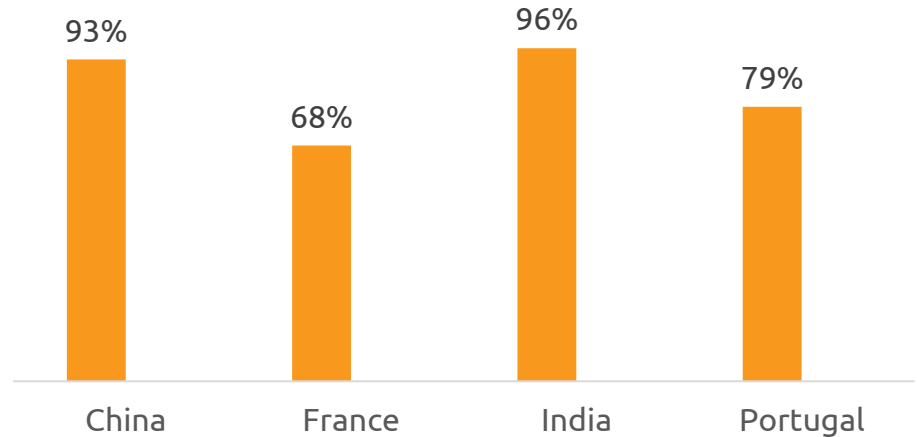


Marketing Opportunities

Willingness to Relocate to Luxembourg



% willing to relocate to Luxembourg

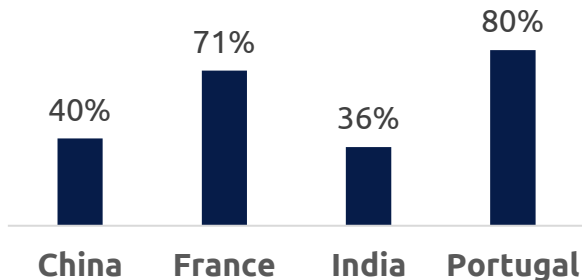


Q. If a job opportunity that matched your skill and salary requirements was offered to you in Luxembourg, would you relocate there?

Profile: Willing to Relocate to Luxembourg

54%

correctly identify
Luxembourg
on a map



- 60% are in their 30s or 40s.
- 81% have a Bachelor's Degree or higher.
- Top reasons for considering moving to another country include **improving standard of living/increasing earning potential, quality of life is better** and **for a job opportunity**.
- Perceptions of place are most influenced by **first-hand experience, internet research** and **word of mouth**.
- Information about career and/or new job opportunities is most likely obtained via **online job board sites, company websites** and **own professional networks**.
- Top incentives/programmes employers could offer during relocation considerations are **monthly auto/housing allowance, rent/housing discount, subsidy or assistance** and **moving costs**.

Messages Generating “More Interest”

More Interested

73%

Luxembourg is considered to be one of the safest countries on earth. In Luxembourg, the safety risk is considered very low as shown by the 0.1 risk rate on the Global Residence Index. The country has a well-funded and efficient police force, which helps maintain high safety and security for residents and visitors alike.

70%

With low unemployment rates and thousands of new international workers coming from all over the world each year, Luxembourg stands out as an attractive international job market. With about 75% of its total workforce being foreigners, be it expats or international commuters, Luxembourg has one of the most international workforces in the world. Some of the Grand Duchy's strong points include the high minimum social wage, the continuous growth of disposable incomes per household, as well as its unique wage indexation system. In order to preserve purchasing power, Luxembourg has implemented an automatic national wage indexation system to the cost of living, which helps the Grand Duchy maintain social peace, and as a consequence there have only been a very low rate of strikes, industrial action or social unrests over the last decades compared to other countries.

69%

Luxembourg has implemented a competitive national research and innovation strategy. The objective is to create a society and economy that fosters sustainable, diverse and digital know-how, and to build a better future. Throughout history, the Grand Duchy has always been a dynamic country that has managed to re-invent itself on numerous occasions. Following in the footsteps of its industrial heritage in the steel industry and its role as a leading global center in financial services, Luxembourg is gradually re-modelling itself as a center of excellence in the field of innovative technologies and research through the active development on a limited number of new priority sectors: Industry 4.0, clean technologies, health technologies, logistics and value chains, space economy, and information & communication technologies.

Statements with Lower Impact

More Interested

67%

Luxembourg is home to a multitude of museums, theatres and municipalities with cultural centers with multilingual programming that cover all types of performing arts. In Luxembourg, associations and institutions are striving to make culture a tangible right accessible to all. Against this backdrop, theatres are hosting more inclusive projects, museums are becoming more accessible and the Kulturpass provides free or reduced-price access to cultural events.

63%

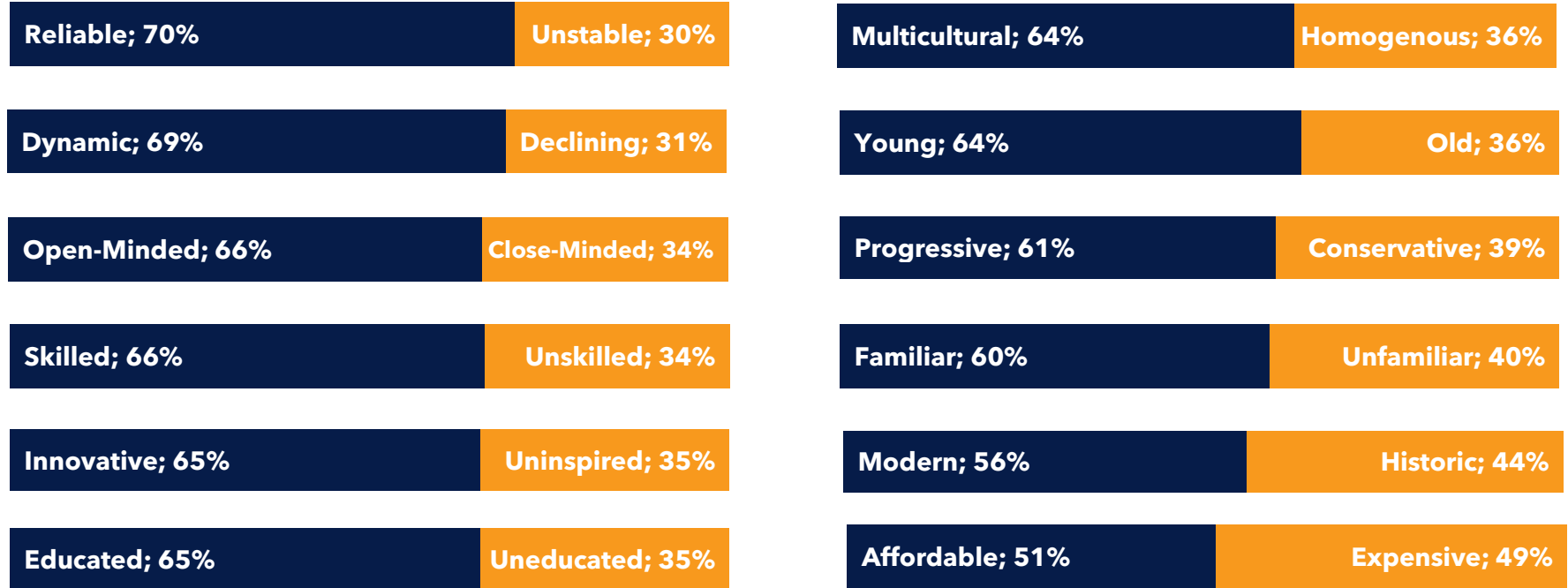
The Greater Region – including regions of Germany; France; Belgium; and Luxembourg - is located in the heart of the European Union, is on the road and rail axis that links the Mediterranean region to the North Sea in Europe. Its 11.6 million inhabitants, spread over an area of 65,401 sq.km., generate a GDP of about 400 billion euros – 2.5% of the overall GDP of the EU. With about 220,000 international commuters, the Greater Region is a model within Europe in terms of the free movement of people, goods services and capital.

Messages Generating the Most Interest, by Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Luxembourg is considered to be one of the safest countries on Earth (74%)	Luxembourg is home to a multitude of museums, theatres and municipalities with cultural centers (55%)	Luxembourg is considered to be one of the safest countries on Earth (82%)	Luxembourg is considered to be one of the safest countries on Earth (85%)
#2	Luxembourg stands out as an attractive international job market (70%)	Luxembourg stands out as an attractive international job market (54%)	Luxembourg has implemented a competitive national research and innovation strategy (81%)	Luxembourg stands out as an attractive international job market (84%)

Q. For each statement, please indicate whether it makes you more interested, less interested or doesn't impact your interest in living and/or working in Luxembourg.

Luxembourg's Personality or "Feel"



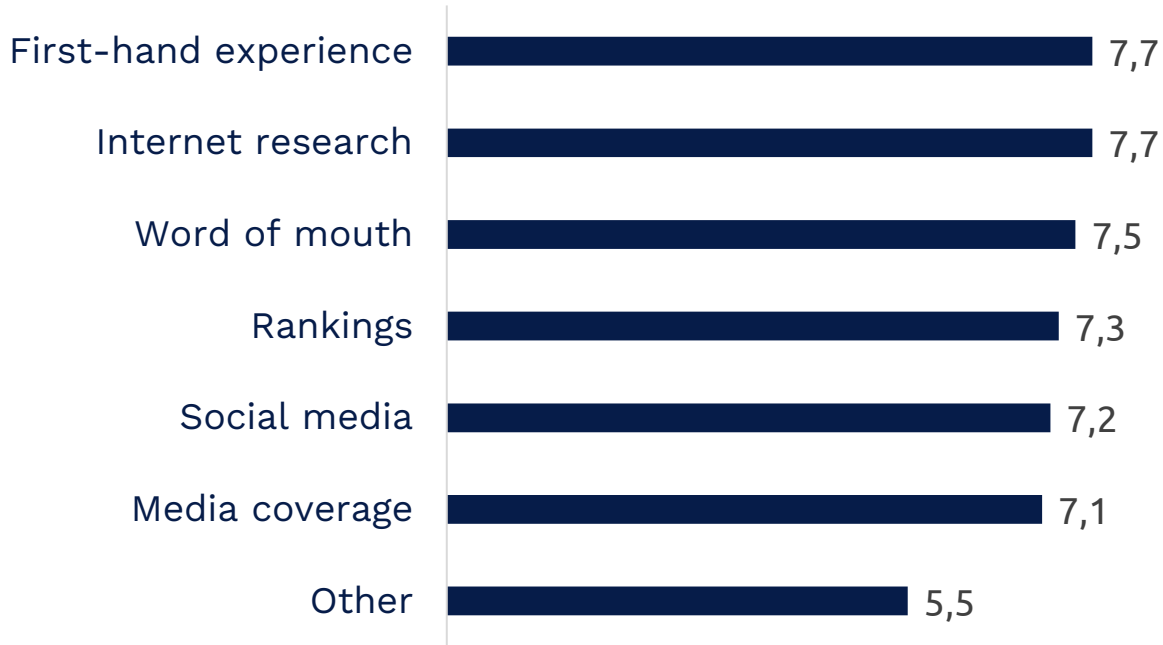
Q. Considering the following pairs of words, which word more closely aligns with the "personality" of Luxembourg (based on your experience or general perceptions)?

Luxembourg's Personality or "Feel," by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	Reliable (91%)	Open-Minded (62%)	Dynamic (62%)	Dynamic (76%)
#2	Progressive (87%)	Innovative (59%)	Reliable (58%)	Reliable (74%)
			Young (58%)	Educated (74%)
#3	Educated (86%)	Reliable (58%)	Familiar (55%)	Skilled (73%)
		Dynamic (58%)		
#4	Innovative (85%)	Skilled (56%)	Expensive (54%)	Multicultural (68%)
			Multicultural (54%)	
#5	Young (84%)	Educated (55%)	Open-Minded (53%)	Innovative (66%)
	Open-Minded (84%)		Skilled (53%)	
			Uneducated (53%)	

Q. Considering the following pairs of words, which word more closely aligns with the "personality" of Luxembourg (based on your experience or general perceptions)?

Information Sources Influencing Perceptions



Q. How influential are each of the following sources of information on your perceptions of a location in which to live and work? (1=not influential, 10=extremely influential)

Top Information Sources Influencing Perceptions, by Target Market

	CHINA	FRANCE	INDIA	PORTUGAL
#1	First-hand experience (8.2)	Internet research (6.8)	First-hand experience (8.4)	First-hand experience (7.6)
			Internet research (8.4)	Internet research (7.6)
#2	Internet research (7.9)	First-hand experience (6.5)	Rankings (8.1)	Word of mouth (7.5)
		Social media (6.5)		
		Word of mouth (6.5)		
#3	Word of mouth (7.8)	Media coverage (6.4)	Social media (8.0)	Rankings (7.3)
			Word of mouth (8.0)	

Q. How influential are each of the following sources of information on your perceptions of a location in which to live and work? (1=not influential, 10=extremely influential)

Information Sources for Job Opportunities



Q. Where would you most likely get information on career and/or new job opportunities? (choose up to three)

Top Information Sources for Job Opportunities, by Target Market

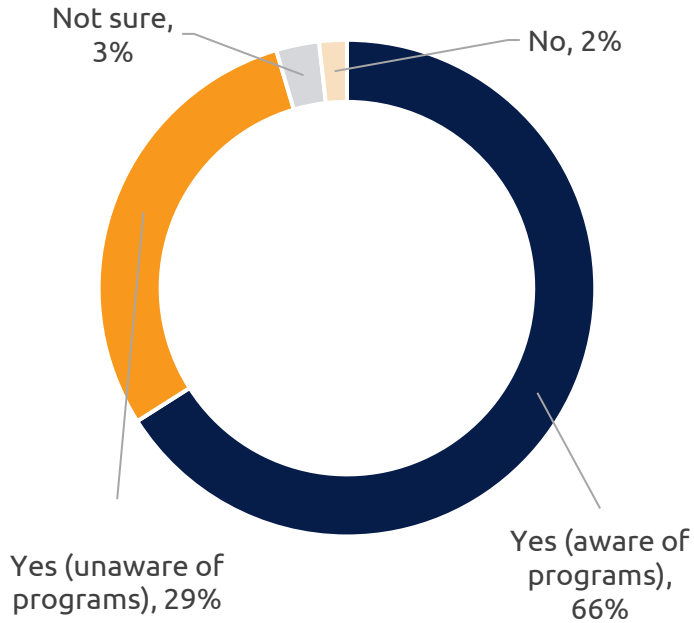
	CHINA	FRANCE	INDIA	PORTUGAL
#1	Online job boards (48%)	Friends/family (33%)	Online job boards (46%)	Online job boards (43%)
#2	Social media (38%)	Social media** (26%)	Company websites (34%)	Friends/family (34%)
		Professional network (26%)	Social media* (34%)	
#3	Recruiter (36%)	Company websites (23%)	Career/job fairs (30%)	Company websites (32%)
				Professional network (32%)

**Instagram, YouTube, Tik Tok

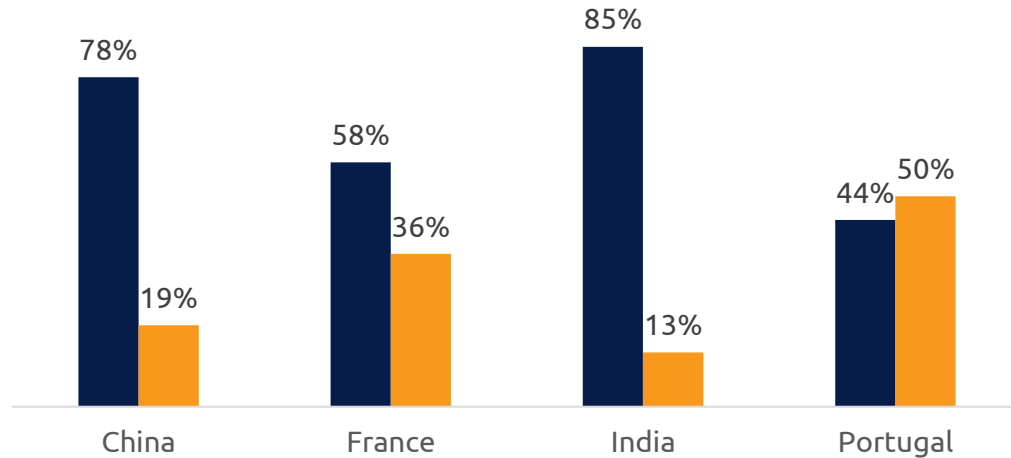
*YouTube, Instagram, Facebook

Q. Where would you most likely get information on career and/or new job opportunities? (choose up to three)

Willingness to Undergo Additional Training/Education



- Yes, and I'm aware of training programs offered locally or online
- Yes, but I'm not aware of training programs offered locally or online



Q. Would you be willing to undergo additional training or education if it allowed you to shift your career path?

Agreement with Statements about Training

I would be willing to relocate to a new region/country to access free training that allowed me to upgrade my career or job prospects



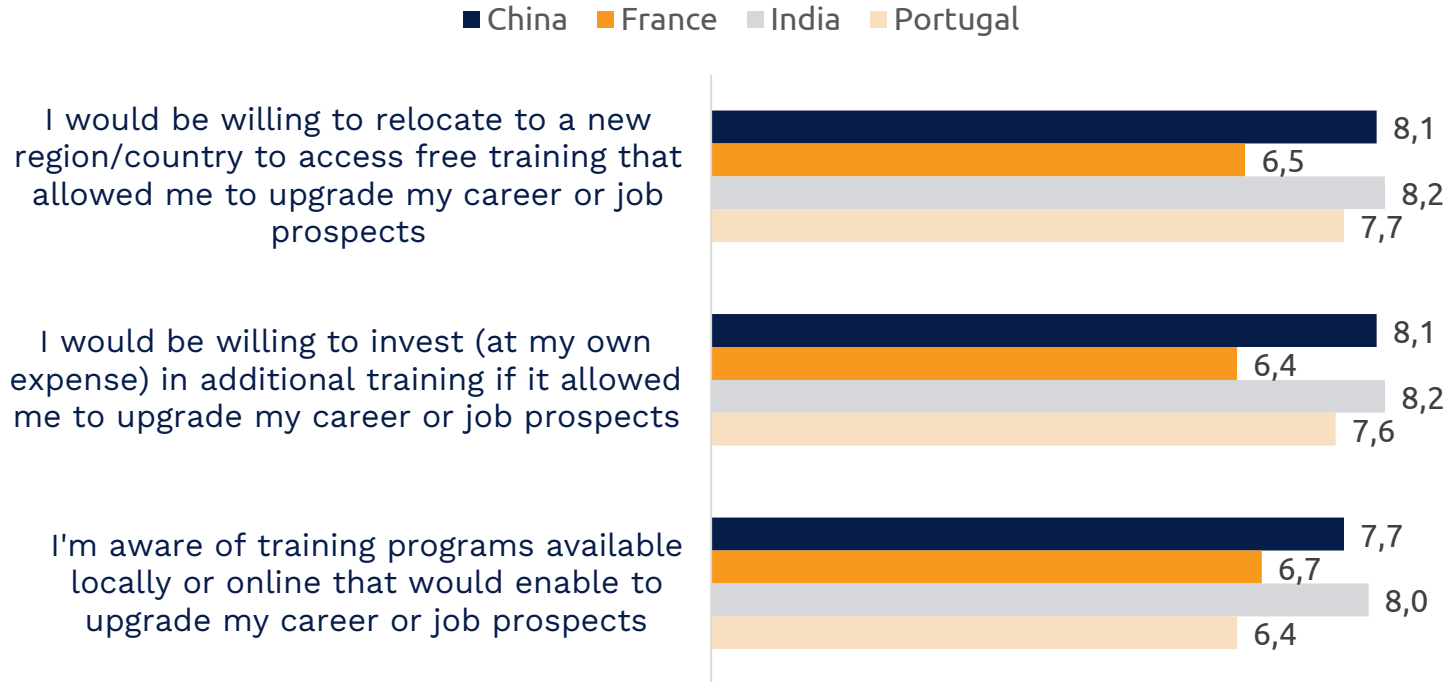
I would be willing to invest (at my own expense) in additional training if it allowed me to upgrade my career or job prospects



I'm aware of training programs available locally or online that would enable to upgrade my career or job prospects



Agreement with Statements about Training, by Target Market



Q. On a scale from 1 (strongly disagree) to 10 (strongly agree), how much do agree with each of the following statements?

Thank You!

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OOO GLOBAL

