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Luxembourg for Tourism

Latest travel insights

Update – 30 September 2025

Contents

Executive Summary

Executive Summary (1/2)

Performance year-to-date 2025, vs. 2024 (provisional figures)

- Luxembourg, arrivals (Jan-Jul): total paid +3%, hotels +4%, campsites +1%, youth hostels -3%, other paid +4%.
- Luxembourg, arrivals (Jan-Jul), best-performing source markets: IT +39%, FR +21%, BE +10%, DE +2%. All inbound +4%.
- LFT estimate, Aug: hotels ca. -4%, campsites ca. -5%, youth hostels +4%, all inbound (paid + non-paid) ca. -5%
- Luxembourg, hotels (Jan-Aug): occupancy rate 74% (+2%), ADR 148€ (+1%), RevPAR 109€ (+3%)
- Luxembourg, visitors (Jan-Aug): tourist infos -4% (Lux-City), +11% (other) ; castles +1% ; museums +3% ; leisure sites +11%.

LFT Hotel & Camping Survey

- Hotel occupancy rate forecast: 71% (Aug, -3 pts), 75% (Sep, -3 pts), 73% (Oct, -3 pts). A larger number of hotels assess this year's summer season to be comparatively worse than usually, except in the North & East regions (despite also facing a - slighter – drop in occupancy in August (-2 pts.)
- The decline in hotel occupancy in autumn is slightly more business-travel-driven although this varies by destination regions.
- Shares of both domestic nights and length of stay expansion among hotels and campsites have increased in summer 2025 vs. 2024, suggesting these trends are accelerating (in the case of hotels, this is considerably more often witnessed in the North & East regions).
- Guests' reluctance to spend on-site continues to rise, to 63% among hotels (2024: 59%) and 53% among campsites (2024: 41%).
- Camping occupancy rate forecast: 79% (Aug, -6 pts), 41% (Sep, -1 pt), 31% (Oct, +7 pts). The decline, mostly driven by Dutch guests, has to be relativized since projected nights would remain over a third higher than before the pandemic for the summer months.
- Strong demand for hiking and motorhome stays are key drivers for demand in autumn on campsites.
- Turnover, Jan-Aug: hotels +3% (North & East regions: +11%), campsites +15%.
- 9% of hotels and no campsites are seeing any positive impact of the "Trounwiessel" festivities on bookings for the start of October.

>>

Executive Summary (2/2)

Current search & booking data

- Hotel searches +7%, bookings -6%, leaving room for further growth in bookings for the coming weeks. Year-on-year hotel search growth for business (+9%) currently exceeds that for leisure travel (+4%).
- Flight searches +5%, bookings +12% vs. last year, also more strongly driven by business (+18%) than by leisure travel (+10%), esp. for arrivals in December and beyond. Growth is esp. strong (+17% each) for flight arrivals in November-December 2025 and March 2026, and seat capacities are rising by 7%.
- Camping bookings -6% for Sept, +10% for Oct, +5% forecast for entire year.
- Year-on-year growth trends for next months are most consistent from the UK (hotels, flights and campsites simultaneously). Hotel demand growth is also recorded from FR, NL, IT ; flight demand growth from DE, AT, PL ; camping demand growth from BE.
- Travel-related searches on Google generally remain higher than last year across most source markets (except FR, ES) but are down 5% for destination Luxembourg. Hiking-related searches remain elevated in absolute terms and show double-digit year-on-year growth across many markets. Search growth is recorded for city trips to Luxembourg from most markets, esp. FR, BE, AT, contrasting the European trend in this segment.

Luxembourg’s E-Reputation

- In August, travel sentiment towards destination Luxembourg strengthened, as measured by the Net Sentiment Index which reached +85. The index measures the difference between positive (+100) and negative (-100) mentions in online travel-related conversations.
- Positive conversations were fueled by cultural highlights and events, outdoor experiences, architecture and culinary.
- Satisfaction ratings and sustainability perception of Luxembourg’s offer online platforms declined in August, likewise to other European destinations, reflecting strong visitor pressure. However, accommodation ratings resisted well and perception of value-for-money improved (+0.22 pts. vs. July)

Recent Performance Data

Hotels & Campsites

Nights & Arrivals

HOTELS *(Statec data)*	Jan-Jul 2025	vs. Jan-Jul 2024
Nights	1.160.813	+3%
Arrivals	647.313	+4%

Source: Statec, provisional figures.

YOUTH HOSTELS	Jan-Jul 2025	vs. Jan-Jul 2024
Nights	89.497	-5%
Arrivals	49.154	-3%

Source: CAJL.

TOTAL PAID[1]	Jan-Jul 2025	vs. Jan-Jul 2024
Nights	2.124.950	+1%
Arrivals	922.471	+3%

Source: Statec, provisional figures.

CAMPSITES *(Statec data)*	Jan-Jul 2025	vs. Jan-Jul 2024
Nights	798.325	-2%
Arrivals	205.738	+1%

Source: Statec, provisional figures.

RENTALS *(Statec data)*	Jan-Jul 2025	vs. Jan-Jul 2024
Nights	76.315	+9%
Arrivals	20.266	+4%

Source: Statec, provisional figures.

LFT estimate	August 2025 vs. August 2024
Hotels[1]	ca. -4%
Campsites[2]	ca. -5%
Youth Hostels[3]	+4%
Total inbound (paid + non-paid)[4]	ca. -5%

[1] Based on LFT survey & MKG Hospitality (occupancy rate), and Sojern booking data
[2] Based on LFT survey & Tommybookingsupport booking data
[3] Actual data as reported by CAJL, arrivals.
[4] Based on sources mentioned under [1, 2, 3], mobile phone data and LFT/Ilres Visitor Survey 2024-2025.

Arrivals by source markets

Arrivals in paid accommodation *(Statec data)*	**Jan-Jul 2025 vs. Jan-Jul 2024**
Total inbound	**+4%**
NL	-1%
BE	+10%
DE	+2%
FR	21%
UK	-3%
US	+1%
IT	+39%
CH	-4%
ES	-3%
LU	-3%

Foreign markets listed in decreasing order of actual market share.

Source: Statec.

Hotels & Short-term Rentals

HOTELS Luxembourg City *(MKG data)*	**Jan-Aug 2025**	**vs. Jan-Aug 2024**
Occupancy rate	74,0%	+2,1%
ADR	147,6 €	+0,6%
RevPAR	109,2 €	+2,6%

Source: MKG Hospitality.

SHORT-TERM RENTALS (Sharing Economy) (*)	**Jan-Jun 2025**	**vs. Jan-Jun 2024**
Occupancy rate	51,9%	+15,7%
Supply (capacity[1])	8.109	+17,4%

Data refers to short-term rentals on Airbnb, HomeAway, VRBO.
Source: Lighthouse/ETC. [1] As of June 2025.

Tourist Info & Attractions

Visitors

Tourist Infos	Jan-Aug 2025 vs. Jan-Aug 2024
Luxembourg City	-4%
Other regions	+11%[1]

Tourist Attractions	Jan-Aug 2025 vs. Jan-Aug 2024
Castles	+1%
Museums	+3%[1]
Leisure sites	+11%
Guided tours	+9% (City) / -5% (ORT)

[1] Without Schengen TI & Musée Européen Schengen (partly closed in 2025).

Source: LFT survey.

LFT Hotel & Camping Survey

LFT Hotel Survey

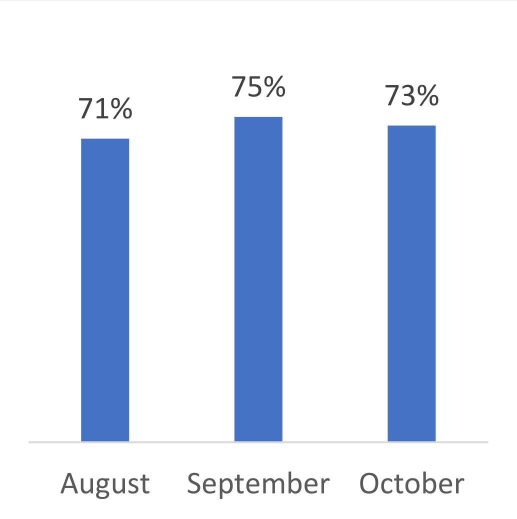
10 – 26 September 2025 : 49 hotels

Occupancy rate in August reached 71% in **hotels**, according to LFT's latest survey, which represents a **3 points decrease** compared to last year for the national average (-3 pts. in Luxembourg City and -2 pts. in South & Guttland). As usual for the summer season, the **highest** occupancy rates were reached in the **North & East regions**, with 81%, a decline of 2 pts. The slight drop in demand is also reflected in **hotels' assessment of the summer season 2025**, which is judged less positive than what could be reasonably expected by a larger number of respondents, resulting in a **net decline** (see middle chart below). **The exception is the North & East** where a net growth of +13 was achieved, i.e. the number of hotels claiming this year's peak season to be better than average exceeds the negative ratings by 13 respondents.

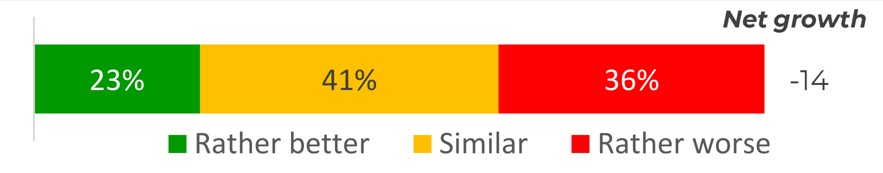
Prospects for September-October are also more subdued than last year, with forecast occupancy **roughly 3 points below 2024** for both months (75% for September and 73% for October). Year-on-year trends for these two months are similar across all regions, although hotels in South & Guttland have forecast a particularly sharp decline for October (-7 pts.).

Regarding booking trends by sub-segments for the coming months, **leisure hotel demand** is expected to remain largely stable while a slightly higher share of respondents are seeing declining booking levels in the **business travel** segment compared to one year ago. **In Luxembourg City**, more hotels are forecasting leisure to drop and business travel demand to grow, whereas the trend is exactly opposite across all other regions.

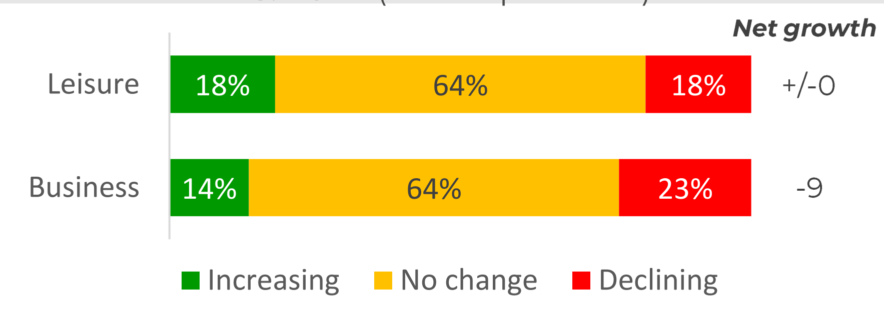
Occupancy rate
(forecast)



Perception of summer 2025
(compared to what is usually observed ; % of respondents)



Share of bookings, trend next months 2025, vs. 2024 (% of respondents)



Source: LFT survey.

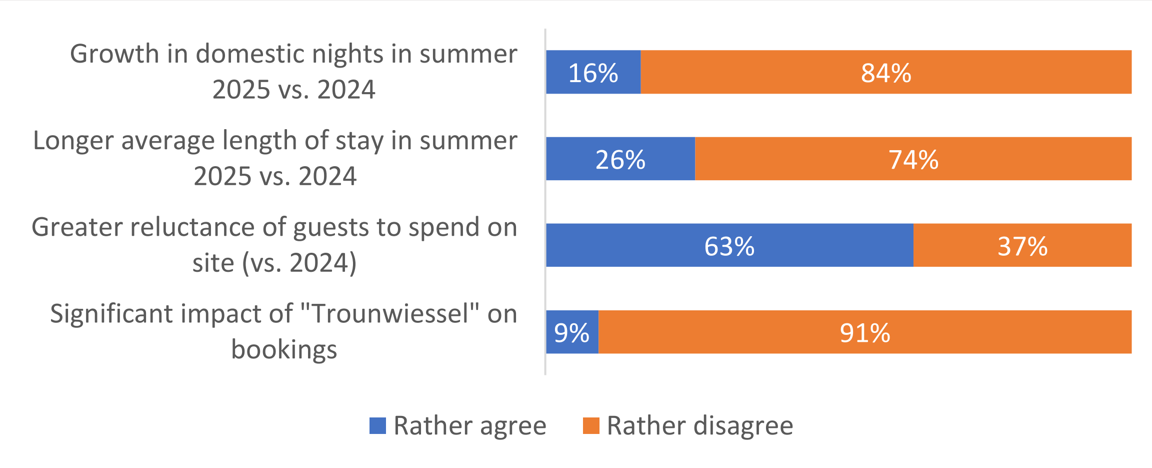
LFT Hotel Survey

10 – 26 September 2025 : 49 hotels

Looking back at the summer season, only a minority of hotels have experienced higher **demand by the domestic market** (in terms of overnights), while about a quarter of respondents have observed an **expansion of guests' average length of stay** in July-August compared to 2024. Both indicators exceed last year's levels, and both phenomenons have been considerably more often observed by hotels in the **North & East regions**, and this Is especially true with regard to length of stay expansion (42% of hotels in those regions). The proportion of hotels facing **greater reluctance of their guests in terms of on-site spending** remains high, at 63% (it was 59% one year ago, but 77% in July this year); it was lowest in the North & East regions. The **festivities for the "Trounwiessel"** do not act as an important driver for hotel bookings, since merely 9% of respondents are seeing any positive impact on bookings for the start of October.

Overall, **turnover in Luxembourg's hotel industry** for the first eight months has picked up by 3% over the same period last year (+11% for North & East regions). Despite the slightly less upbeat outlook for September-October, two **third of hotels have expressed optimism for the remainder of the season** 2025 (but only 50% in Luxembourg City), up 5 pts. since our previous survey in July.

Economic statements (% of respondents)



Turnover, Jan-Aug 25
% vs. 2024

+3%

Optimistic regarding remainder of season 2025

67%
(July 2025: 62%)

Source: LFT survey.

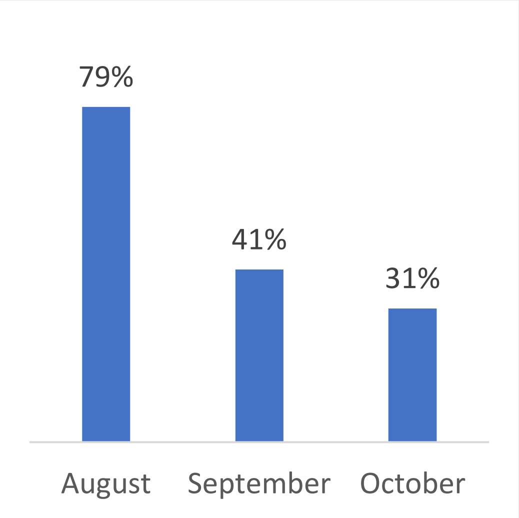
LFT Camping Survey

10 – 26 September 2025: 15 campsites

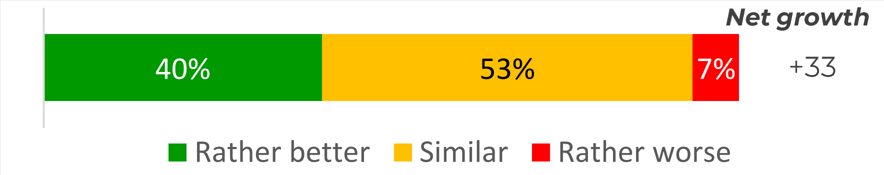
Similarly to hotels, **demand on Luxembourg's campsites** appears to have **regressed this August compared to 2024**, with occupancy rate reaching 79% (-6 pts.). However, this follows an exceptional start of the peak season in June and a nearly stable occupancy rate in July. It should be noted that, according to Statec figures, **overnights in July were still 25% higher than in 2019**, and even the projected declines in demand for August would still keep overall volumes far ahead of pre-pandemic levels. Accordingly, **positive assessments of this year's summer season exceed negative ones**, in terms of number of respondents (see middle chart), resulting in a net growth indicator of +33.

For **September**, survey respondents are expecting **occupancy rates to slightly drop**, too, by 1 point, whereas camping demand in **October** is forecast to **outperform that of last year by 7 points in terms of occupancy rates.** This highlights again the increasing trend for autumn stays. The unpredictability of weather conditions in that period often tends to drive higher shares of **last-minute bookings**. Strong demand for **hiking** is also a key driver for demand in autumn on campsites. Another one are **motorhome stays,** which are forecast to yield similarly high demand shares as last year this autumn, according to the vast majority of respondents. Demand prospects for **rentals** are, by contrast, slightly more downbeat as comparatively more campsites expect their market share to drop vs. 2024.

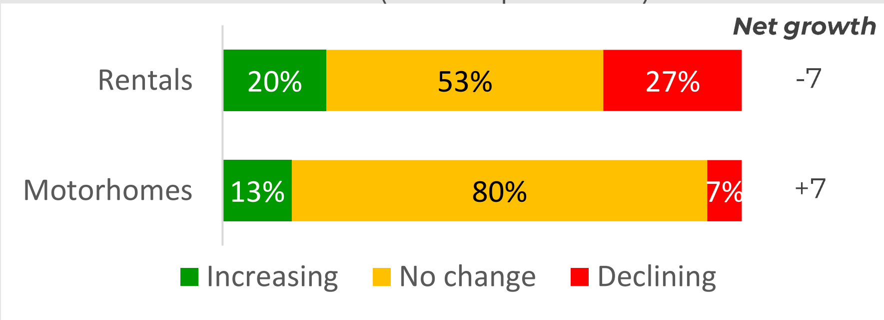
Occupancy rate
(forecast)



Perception of summer 2025
(compared to what is usually observed ; % of respondents)



Share of bookings, trend next months 2025, vs. 2024 (% of respondents)



Source: LFT survey.

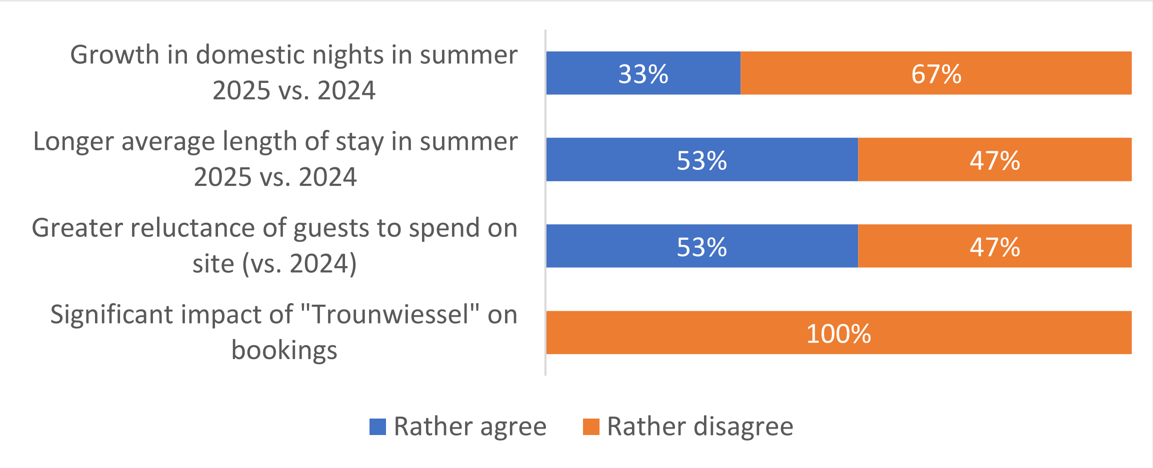
LFT Camping Survey

10 – 26 September 2025: 15 campsites

A third of campsites have witnessed **growth in domestic nights this summer**, compared to last year, and about half of respondents have recorded an **expansion in average length of stay** of their clients (up from 41% one year ago, suggesting an accelerating trend). Campsites are seeing **no impact with regard to the upcoming "Trounwiessel"** festivities on booking volumes.

A somewhat worrying trend resides in the **rising hesitancy of guests to spend on-site**, an observation made by 53% of campsites (it was 41% last year, and only 21% in our previous survey in July). That said, **turnover figures are still largely positive**, exceeding 2024 levels by no less than 15%, after a 24% increase between 2023 and 2024, also driven by recent rate growth (but also reflecting higher operating costs for businesses). 80% of campsites claim to be **optimistic with regard to the remainder of the season 2025.**

Economic statements (% of respondents)



Turnover, Jan-Aug 25
% vs. 2024

+15%

Optimistic regarding remainder of season 2025

80%
(July 2025: 93%)

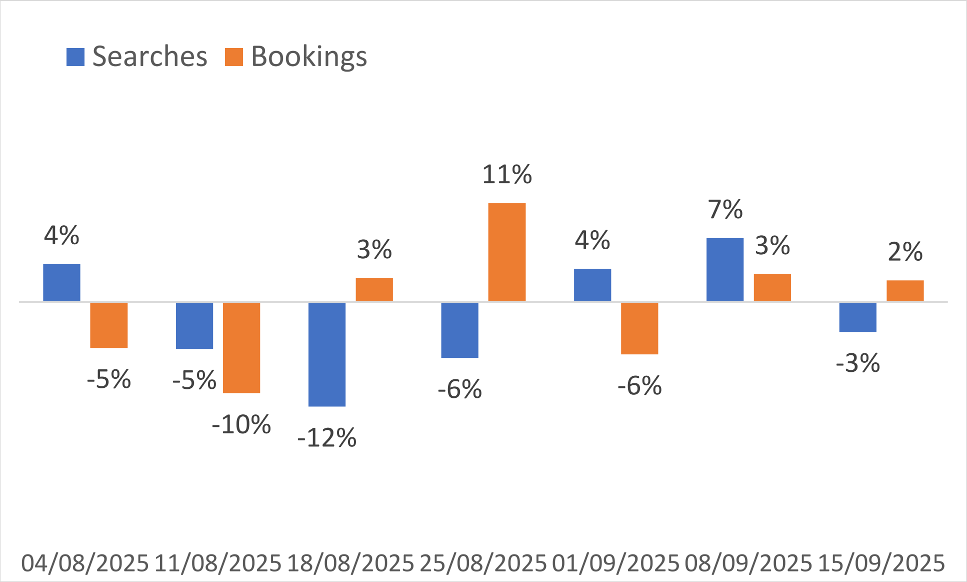
Source: LFT survey.

Search & Booking Data
(Hotels / Flights / Campsites / Travel Themes)

Hotel Searches & Bookings

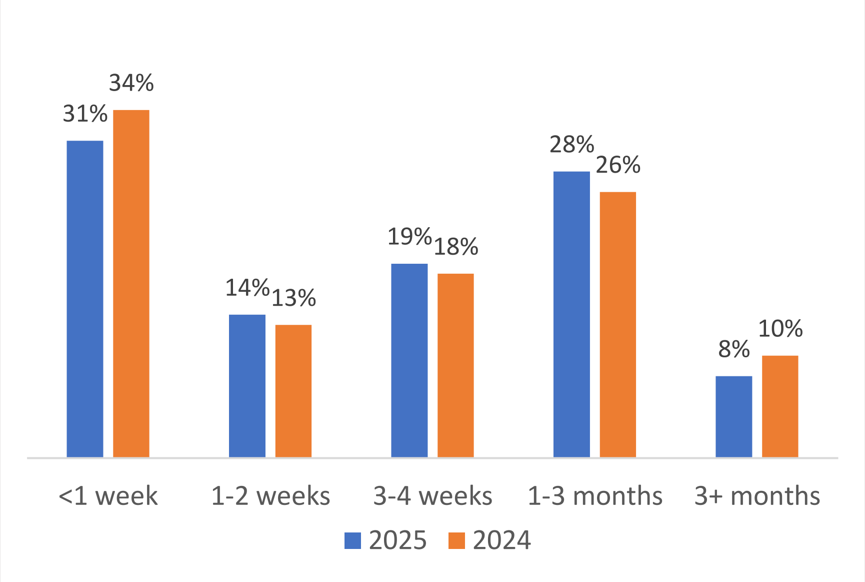
Luxembourg

Hotel searches and bookings, all future arrivals, % week-on-week change



Dates on the chart refer to the starting day of the respective week.

Lead times for inbound hotel searches to Luxembourg made between 25.8.-25.9.



Hotel searches for all future arrivals, % change vs. 2024

As August went on, **weekly volumes of new searches made for future hotel stays** in Luxembourg gradually decreased, then picked up during the first half of September. **Weekly booking level trends** showed a relatively similar pattern, yet with a slightly more upbeat pace (+3% week-on-week on average between mid-August and mid-September). During that same period, fewer hotel searches than last year related to **last-minute stays** (i.e. within less than a week of actual arrival date), but also fewer searches referred to hotel stays **over three months ahead.**

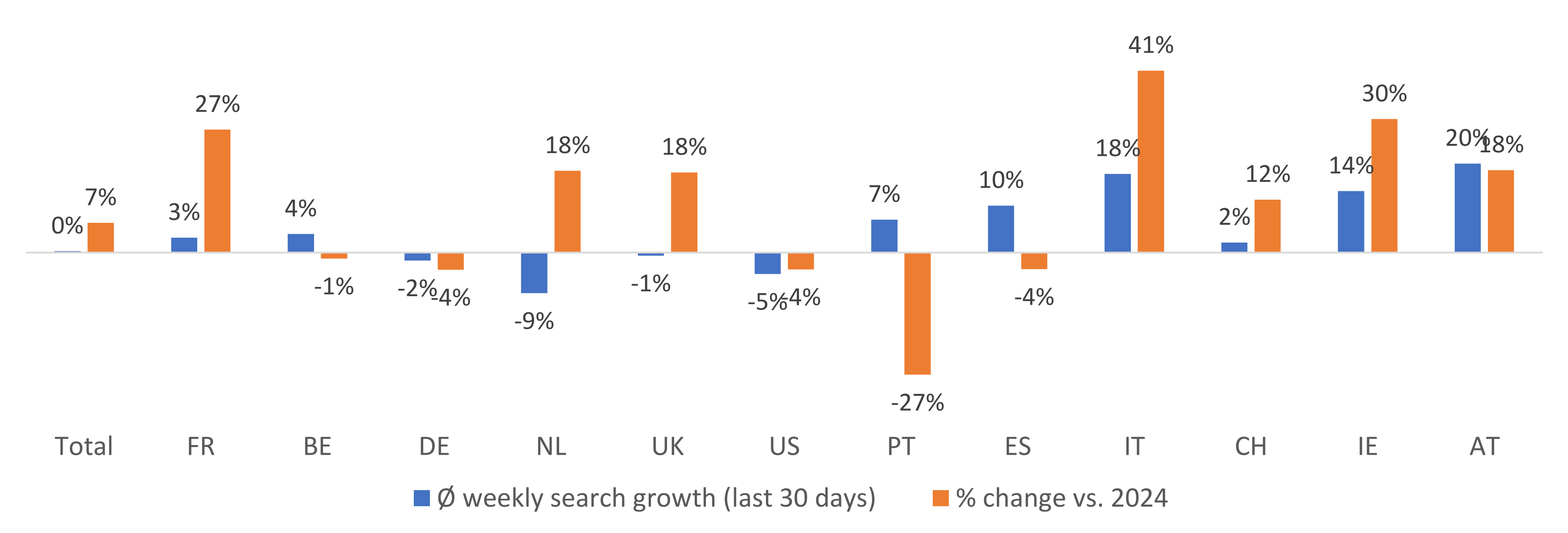
Compared with the same date last year, hotel searches for future stays in Luxembourg are 7% higher, but forward bookings are currently 6% lower than in September 2024, leaving room **for further growth in bookings** to materialize over the coming weeks. Year-on-year hotel **search growth for business (+9%) currently exceeds that for leisure stays (+4%).** Recent demand trends to Luxembourg have been largely **in line with Western European trends**, and new bookings made since mid-August have dropped even more severely across Western Europe (-13%) than to Luxembourg compared to 2024.

Data source : Sojern.

Hotel Searches & Bookings

Luxembourg

Hotel demand for all future arrivals by top source markets, % change week-on-week & vs. 2024



Hotel searches, % market shares by source market

France	20%
Belgium	16%
Germany	14%
Netherlands	12%
United Kingdom	8%
United States	4%
Portugal	4%
Spain	3%
Italy	2%
Switzerland	2%
Ireland	1%
Austria	1%

Future travel intent to Luxembourg, as measured through **hotel searches**, currently shows quite a **diverging picture depending on source markets:** notably, **year-on-year demand is soaring from France** (esp. leisure), **Netherlands** (esp business), the **UK** (business and leisure) and **Italy** (the latter already showing extraordinary growth throughout the whole year as reflected in the Statec data). By contrast, hotel searches are **down on last year from Belgium, Germany, Spain** and, meanwhile, also the **US**, a major reversal from travel intent growth levels seen earlier this year. Both business and leisure travel hotel demand are equally down across these source markets. When looking at the weekly evolution of new searches recorded, a pickup from France, Belgium and some second-tier European source markets can be observed.

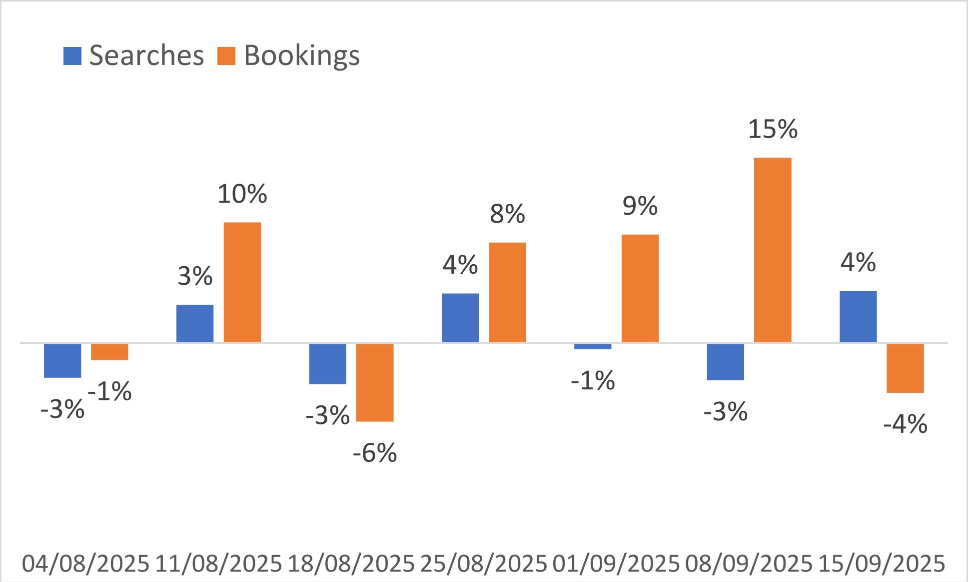
Origin regions or cities that gained a **greater share of demand** for Luxembourg in their respective source markets compared to the same time last year were Lyon, Baden-Württemberg, Bavaria, Milan, Barcelona, Zurich and London.

Data source : Sojern.

Flight Searches & Bookings

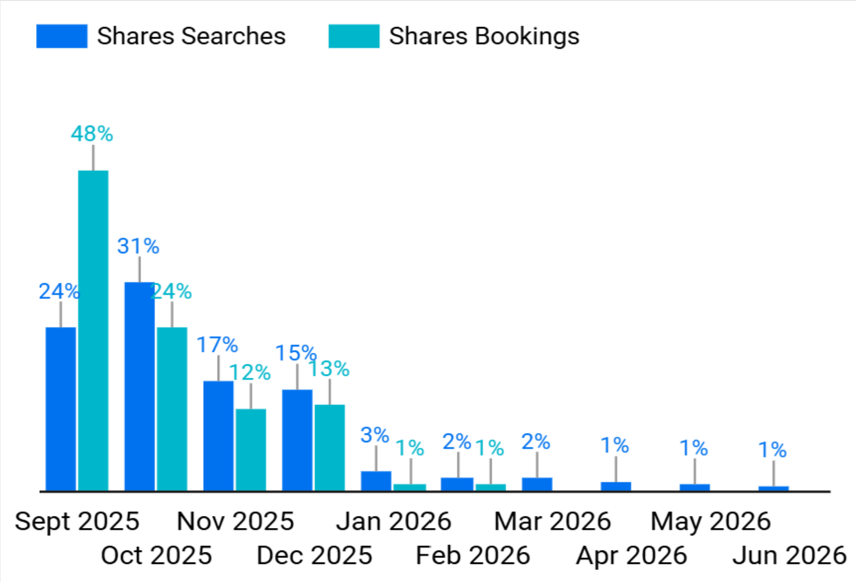
Luxembourg

Flight searches and bookings, all future arrivals, % week-on-week change



Dates on the chart refer to the starting day of the respective week.

Flight searches and new bookings (*), % shares by month of future arrival



(*) Searches made 8.9..-21.9.., bookings last 6 months for travel until Feb 26.

Flight bookings for all future arrivals, % change vs. 2024

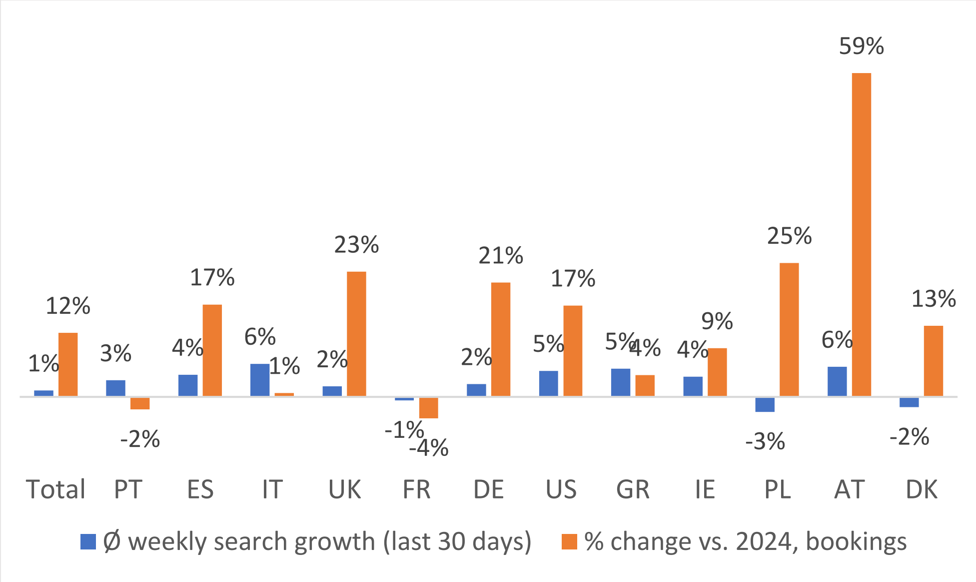
Week-over-week growth of recent volumes for flight searches to Luxembourg has been quite erratic, with no clear trend visible. By contrast, **new bookings** made for future air travel to Luxembourg have shown strong growth in the majority of weeks since the start of August (+7% on average over the past 30 days). When **comparing with last year** at this stage, **flight bookings are up by 12%, while flight searches are 5% higher** than in 2024. Year-on-year booking growth is particularly strong (+17% each) for flight **arrivals in November-December 2025 and March 2026**. This is also reflected in **lead times trends**: a larger share of recent flight searches than last year relates to stays in Q4/25, with a third of demand currently concentrating on trips in November and December. As seen at the hotel level, air travel growth for the coming months is also **more strongly driven by business** (+18% bookings year-on-year) **than by leisure travel** (+10%), and this even more so the case for flight arrivals in December and beyond.

Data source : Forward Keys.

Flight Searches and Capacities

Luxembourg

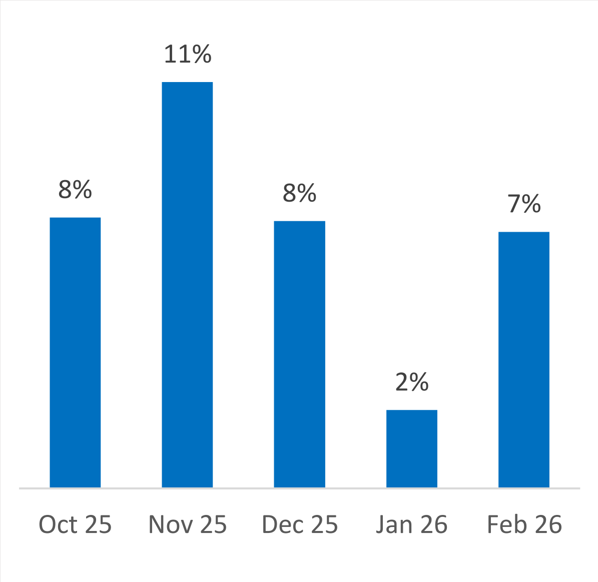
Flight demand for arrivals next 6 months by top source markets, % change searches week-on-week & bookings vs. 2024



Flight searches, % market shares by source market

Portugal	21%
Spain	18%
Italy	13%
United Kingdom	10%
France	9%
Germany	6%
United States	5%
Greece	4%
Ireland	3%
Poland	2%
Austria	2%
Denmark	2%

Seat capacities to Luxembourg by arrival months, % change vs. 2024



Flight connectivity to Luxembourg

	Oct 2025-Feb 2026	Change year-on-year
Countries connected	34	=
Avg weekly flights	481	+26
Seats	1.274.372	+7%
Airlines	17	-1
Top 5 origins, seats (% year-on-year): 1. PT (+3%), 2. ES (+3%), 3. UK (+13%), 4. IT (+34%), 5. DE (+10%)		

No major increases or declines **by key source markets** can be observed in terms of **recent week-on-week average flight search growth** (1% up overall). Bigger variations by origin countries are recorded with regard to **year-on-year flight booking trends** (+12% for total inbound): demand vs. 2024 is particularly strong from the **UK** (esp. for October and into 2026), **Germany** (esp. for December and March 2026 and beyond), **Austria and Poland** (equally driven by business and leisure demand). It is, on the other hand, declining from Portugal and France, the latter due to declining leisure demand in 2026). **Cities and airports** that have contributed significantly to **recent search growth** for air travel to Luxembourg include Toulouse, Berlin, Naples, Madrid and Zurich.

Available **seat capacities** for air travel to Luxembourg from October until February **are expanding by 7%** compared to last year, with a notable 11% increase scheduled for travel in November, in line with demand indicators. Average weekly flight volumes are increasing by 6%. **Airports with disproportionate year-on-year capacity growth** to Luxembourg include Vienna (Luxair), Dublin (Ryanair), London (BA/Ryanair), Milan and Naples (EasyJet/Ryanair), Frankfurt (Air Dolomiti), and Istanbul (Turkish Airlines). London, Frankfurt and Amsterdam remain the cities with the highest number of connected flights and the highest weekly frequency to Luxembourg.

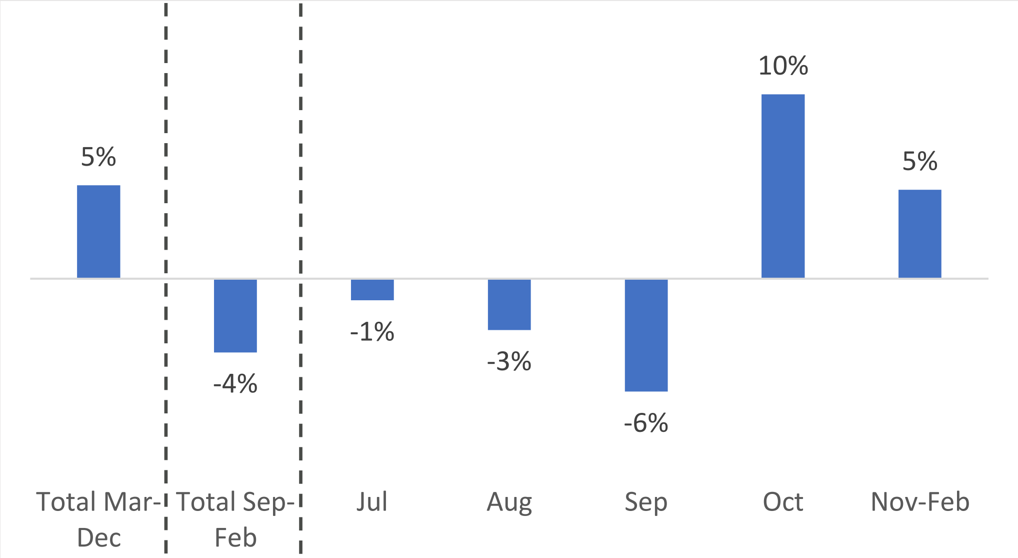
Data source : Forward Keys.

Campsites Bookings
Luxembourg

Since our previous report at the beginning of August, **fewer last-minute bookings for August** than in 2024 have been recorded on Luxembourg's campsites, eventually resulting in a **decline in bookings for that month** vs. last year (-3%). The decline was particularly strong among **Dutch guests** (-7%), whereas bookings **from Germany in August actually improved** by 6%. Based on latest on-the-book figures, **prospects for September** appear to be **subdued** as well, with an even stronger drop of 6% over 2024 expected. A lot of bookings for September are at short notice, and it appears that **month-over-month decline in new bookings throughout September** was more pronounced than last year. By contrast, however, **bookings for October and beyond are increasing by 9% over 2024.**

Demand for the late season (i.e., from September onwards) is **increasing among Belgians and British**, whereas bookings are decreasing across all other source markets, and especially from Netherlands, the main driver behind the overall year-on-year drop of 4% in bookings.

Campsite bookings by month of arrival, % change vs. year ago (*)



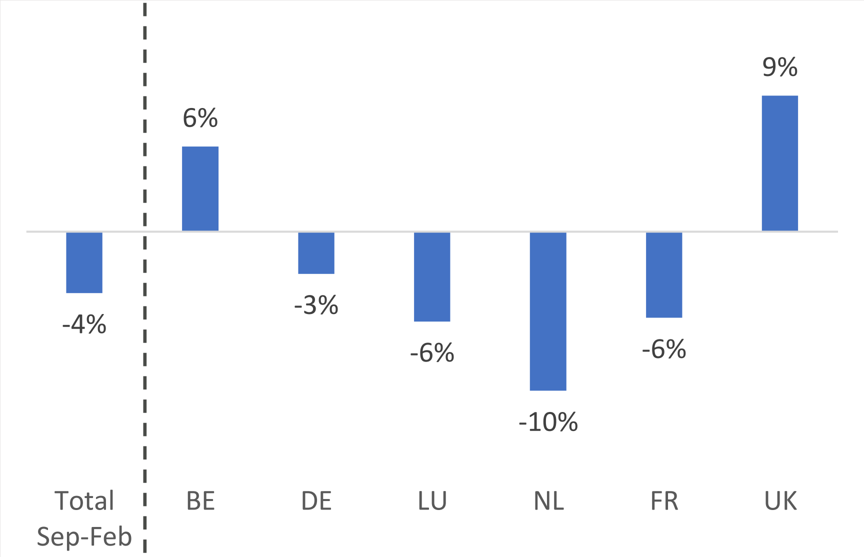
Campsite bookings for arrivals Sept 25-Feb 26, % change vs. year ago

-4%

Campsite bookings made 27.8.-26.9. for future arrivals, % month-on-month change

-24% *(2024: -19%)*

Campsite bookings for arrivals until February 2026 by top source markets, % change vs. year ago (*)



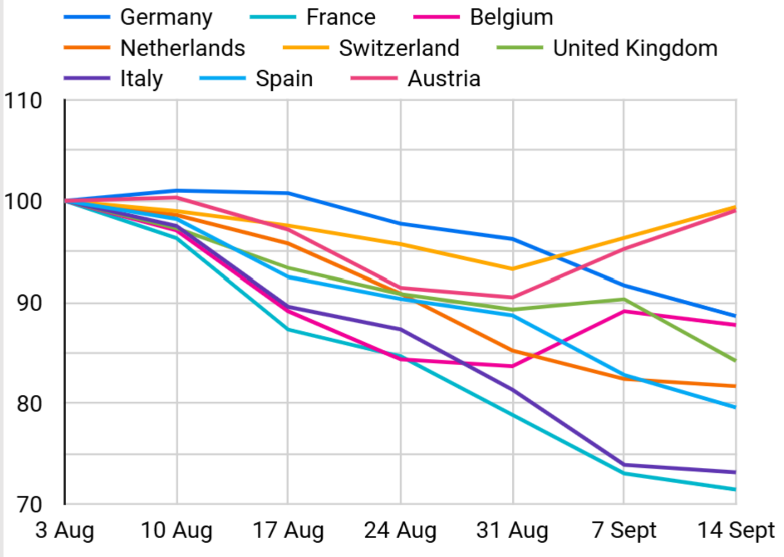
(*) as of 1.8.2025.

Data source : Tommy Booking Support.

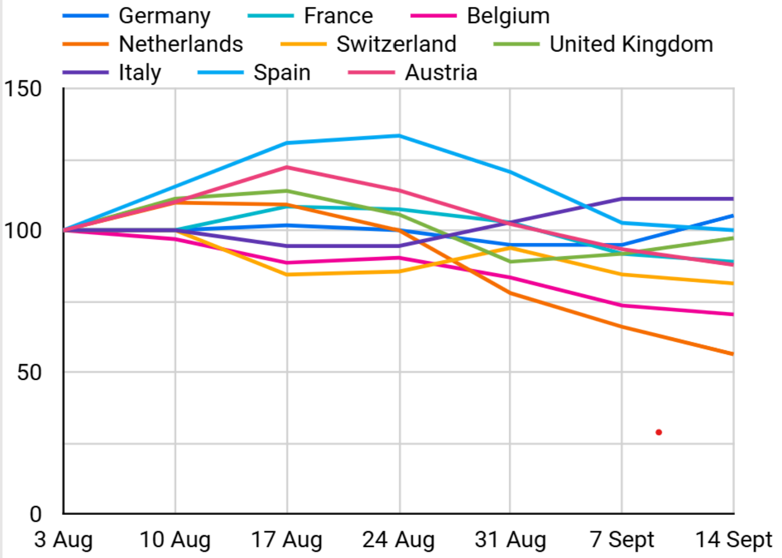
Travel Themes on Google

Evolution of relative search interest on Google in main source markets

ALL travel-related searches (3.8.2025 = index 100)



LUXEMBOURG travel-related searches (3.8.2025 = index 100)



As we enter autumn, **recent travel-related searches on Google** have gradually dropped - however they **remain higher than one year ago across most source markets** with the exception of France and Spain. This seasonal decline in Google searches was less marked for Luxembourg (except among Dutch and Belgian users), with Germans und Italians even showing stronger searches than one month ago. **Compared with last year** at this date, however, **Luxembourg-related travel searches are slightly down** across most markets (about -5% on average). The decline is more pronounced among French users, while **Switzerland and Austria** are the only source markets displaying **year-on-year search growth.**

Hiking-related searches on Google – while recently declining – remain elevated in absolute terms and roughly 5%-10% **higher than last year** among our neighbouring countries and even exceeding growth of 20% in some other European markets such as Switzerland, Austria and the UK, confirming the **rising appeal of outdoor activities in the late season**. By contrast, relative search interest for **youth hostels** on Google is lower than in 2024 across all markets. The same is the case for **holiday homes**, except among French and Italian users. **General search interest for city trips is also down** by roughly 10%-20% over last year (except from the UK). For **Luxembourg City**, however, **search growth is recorded from the majority of analysed source markets**, and most notably among French, Belgian and Austrian users.

Source: Google Trends. The dates on the charts refer to starting day of the respective weeks.

E-Reputation

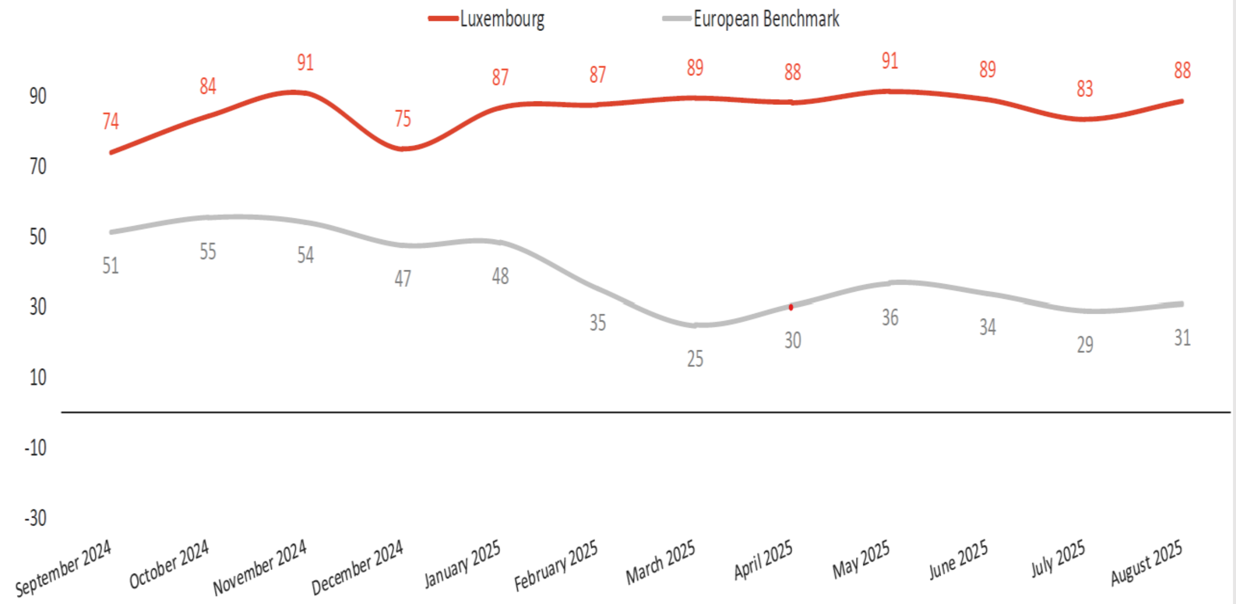
E-Reputation Luxembourg

Conversations on Social Media

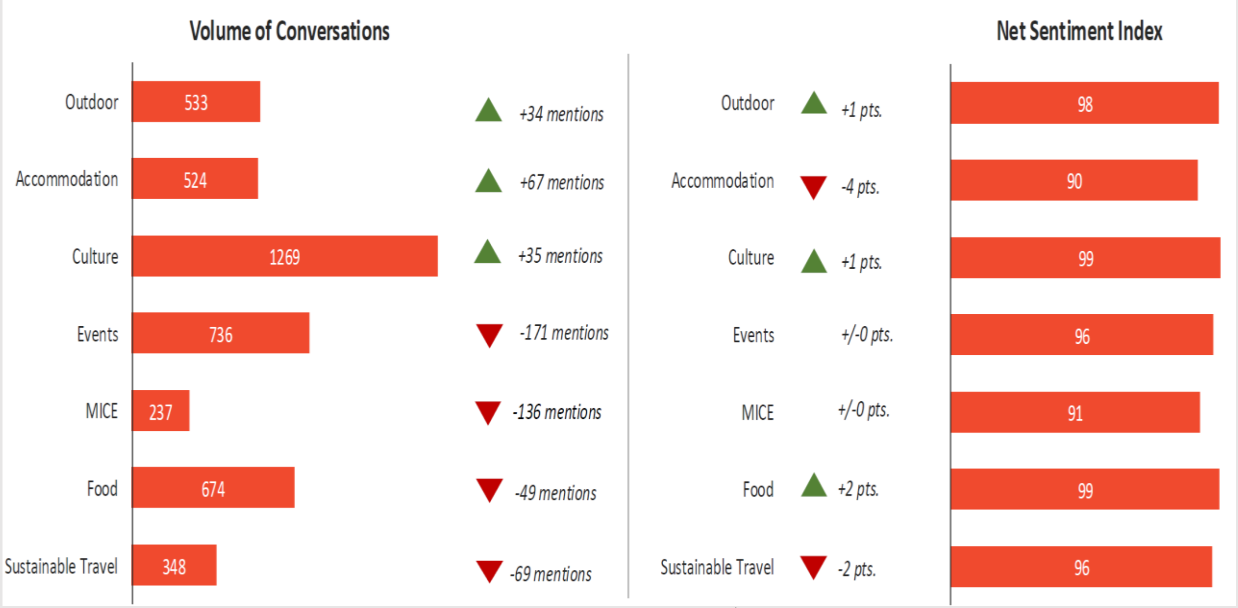
In August, travel sentiment towards destination Luxembourg strengthened, as measured by the **Net Sentiment Index** which reached +85. The index measures the difference between positive (+100) and negative (-100) mentions in online travel-related conversations. For **Europe** as a whole, it only moved up only slightly, reaching +40. Sentiment towards Luxembourg **improved across most markets**, esp. the Netherlands and France. **Discussion volumes** increased across the Culture, Accommodation, and Outdoor themes, while **Sentiment polarity** was strongest in conversations related to **Culture, Food, and Outdoor** activities.

Positive conversations were fueled by cultural highlights and events such as the Schueberfouer, outdoor experiences like cycling, hiking, and camping, and modern buildings including the Skypark Business Center. Culinary moments added further to the positive buzz. **Negative mentions** were limited, focusing mainly on transport disruptions, resident complaints, and safety concerns along one hiking trail (Manternacher Fiels).

Net Sentiment Index of Luxembourg and Europe



Volume of mentions and Net Sentiment Index of Luxembourg by main topics, August 2025 (vs. July 2025)



Source: MMGY/Travelsat Luxembourg Reputation Tracker

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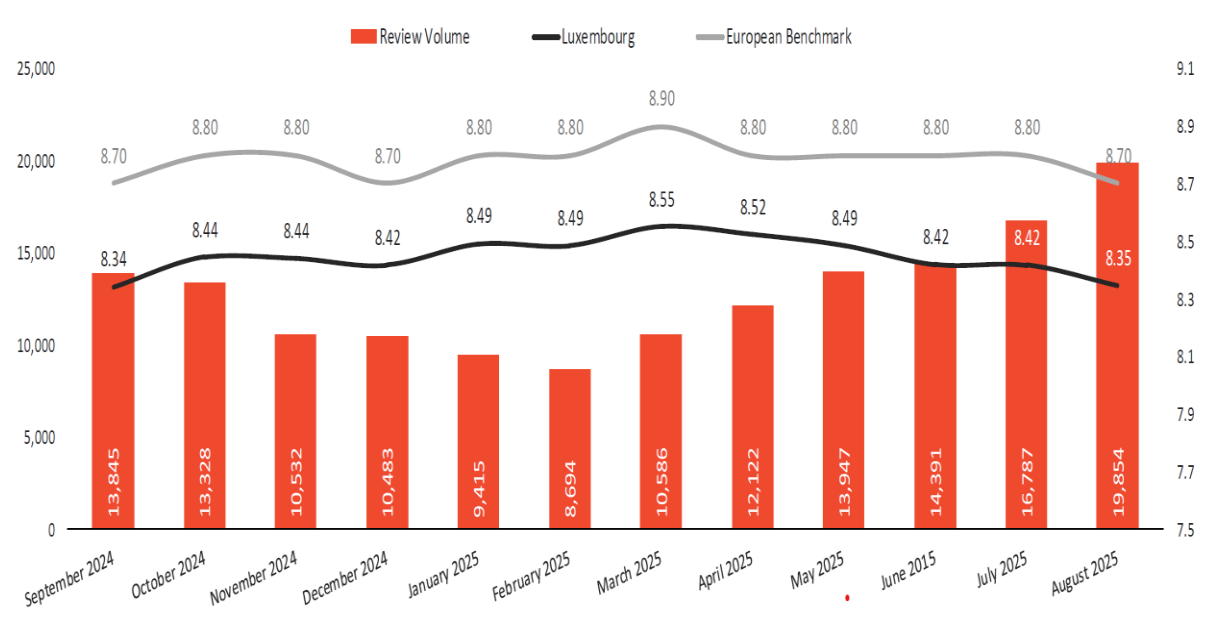
Visitor Experience

In August, the volume of reviews for Luxembourg's tourism offer on **online rating platforms** increased compared to the previous month. Concurrently, **Luxembourg's overall rating experienced a decline**, likely due to the **highest period of visitor pressure** during the summer months. Likewise, the European benchmark score also decreased, although Luxembourg's rating remains below the European average.

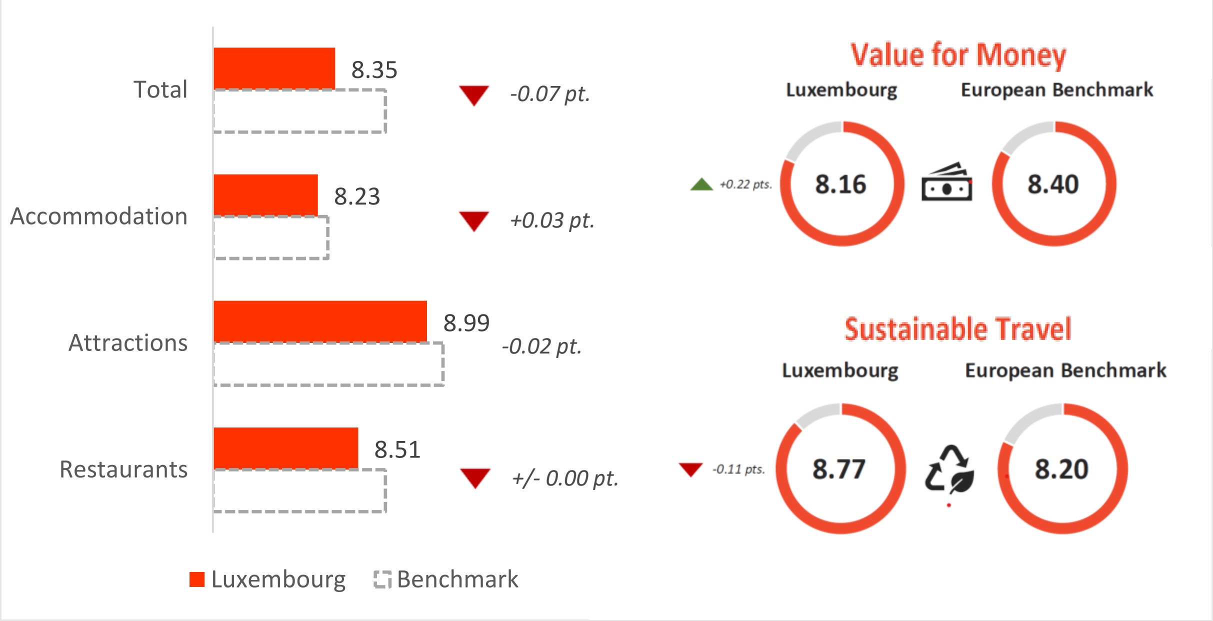
Overall **accommodation ratings** in Luxembourg increased by 0.03 points, presenting a strong capacity to maintain quality during a peak period. Holiday apartments maintained the highest rating, while hotels saw a slight improvement. **Attraction ratings i**n Luxembourg continued their downward trend, in line with the European benchmark. Hiking/Cycling/MTB maintained the highest rating, and positive shifts were recorded in Other Culture & Landmarks and Leisure Sites. **Restaurant ratings** in Luxembourg remained stable, while the European benchmark declined.

The overall perceived **value for money** in Luxembourg improved by 0.22 points in August, while the European benchmark declined. Despite this gain, Luxembourg continues to fall short of the European average. In the **accommodation** sector, perceived value for money strengthened significantly (+0.45 pts). Overall visitor **sentiment toward sustainable travel** in Luxembourg declined by 0.11 points (due to a decline in the accommodation segment) but remained above the European benchmark.

Volume of reviews and avg. rating on online platforms



Average ratings, August 2025 (vs. July 2025)



Source: MMGY/Travelsat Luxembourg Reputation Tracker

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