



Luxembourg for Tourism
Latest travel insights

Update – 27 April 2026



Contents

Executive Summary **03**

Recent Performance Data **06**

Special focus on the impact of the war in the Middle East on travel & tourism **10**

LFT Hotel & Camping Survey **13**

Search & Booking Data (Hotels/Flights/Campsites/Travel Themes) **18**

E-Reputation **25**



Executive Summary

Executive Summary (1/2)



Performance year-to-date 2026 vs. 2025, Luxembourg (provisional figures)

- Nights (Jan-Feb): total paid -4%, hotels -6%, campsites -19%, youth hostels -13%, other paid +63%.
- Arrivals (Jan-Feb), source markets with strongest growth: US, BR, CH, PT, UK, ES. All inbound +4%.
- Hotels (Jan-Mar): occupancy rate 65% (+1%), ADR 145€ (-1%), RevPAR 94€ (+0%).
- Same-day inbound trips (estimate, 1.1.-18.4.): +13%.

Impact of the war in the Middle East on travel & tourism

- Forecast for global international arrivals revised downwards to 6%, due to less outbound travel from the Middle East and long-haul travel from Asia to Europe, higher air fares and longer flight routes.
- Forecast upgraded to +8% for Europe and to +4% for Luxembourg as as travellers shift away from the Middle East to destinations with similar offerings but stronger safety perceptions, better ease of access and better value for money.
- intra-European substitution as more European travellers avoid long-haul travel, driving nearby travel and land-based transport modes, but also leading to increasing competition among European destinations and potentially harming short-break destinations through reduced trip frequencies
- Demand from US and China to Europe expected to remain resilient
- A further shift towards more off-season travel, more affordable travel options as well as shorter or fewer trips is likely
- Duration of the war, fuel price effects and fuel shortages are key determinants of the economic and travel outlook: a 6-month-conflict scenario would have a much more severe impact on the economy and tourism, causing global arrivals to drop (-1%) but European arrivals still to grow (+3%) albeit with higher uncertainty and hesitancy among travellers
- Travel insurance, personalized advice, flexible cancellation policies, ease of planning and seamless experiences are gaining in importance

Executive Summary (2/2)



LFT Hotel & Camping Survey

- Hotel occupancy rate forecast: 69% (Apr, +1 pt), 73% (May, stable), 78% (Jun, +1 pt). Strong regional differences: growth in North, East & Luxembourg City, decline in South & Guttland.
- Camping occupancy rate forecast: 40% (Apr, -3 pts), 62% (May, +23 pts), 55% (Jun, -8 pts), with further growth expected in the motorhome segment.
- Marginally weaker Easter weekend in hotels, but stronger Easter on campsites.
- Prospects for long May weekends are largely stable on campsites and close to full capacity, but are less positive for hotels, esp. in the capital city
- Declining on-site spending and the need for postponing planned investments continues to more affect hotels than campsites, however, shares of hotels reporting these issues have decreased compared to 2025
- Asked about the impact of the Middle East conflict on, campsites mostly believe Luxembourg's tourism could benefit from demand shifts (more short-haul nearby travel), while a majority of hotels expect the impact to be negative due to high energy prices. Over a third of hotels have recorded higher-than-usual levels of cancellations since the outbreak of the war, an observation not made by campsites.
- 52% of hotels (-20 pts vs. 2025) and 87% of campsites (-6 pts vs. 2025) are optimistic regarding the tourism season 2026.

Current search & booking data

- Hotel searches -3%, bookings -2% vs. last year. Decline related to a drop in business travel demand, and a wait-and-see attitude resp. a drop in short, additional breaks among leisure travellers in a context of rising energy prices and increasing demand volatility
- Flight searches +8%, bookings +10% vs. last year, more driven by business travel and as capacities expand (+10% until September)
- Strong year-on-year demand growth for hotel stays from nearby markets, and for air travel from DE, ES, UK, IE, DK, FI as lead times become longer.
- Camping bookings +9% vs. last year, with double-digit demand growth from DE, UK, LU and more subdued growth from NL, and for Sep-Oct.
- Strong growth in travel-related searches on Google; for Luxembourg, growth is mostly limited to city-trip-related searches. (notably from UK, ES, IT, CH). Search growth for hiking, youth hostels and holiday homes varies strongly by individual source markets.



Recent Performance Data

Paid accommodation

Nights & Arrivals



HOTELS (Statec data)	Jan-Feb 2026	vs. Jan-Feb 2025
Nights	238.239	-6%
Arrivals	136.228	-0%

Source: Statec, provisional figures.

YOUTH HOSTELS	Jan-Feb 2026	vs. Jan-Feb 2025
Nights	13.093	-13%
Arrivals	7.211	-9%

Source: CAJL.

TOTAL PAID¹ (Statec data)	Jan-Feb 2026	vs. Jan-Feb 2025
Nights	283.669	-4%
Arrivals	152.264	+1%

Source: Statec, provisional figures.

CAMPSITES (Statec data)	Jan-Feb 2026	vs. Jan-Feb 2025
Nights	14.322	-19%
Arrivals	2.400	-21%

Source: Statec, provisional figures.

RENTALS (Statec data)	Jan-Feb 2026	vs. Jan-Feb 2025
Nights	18.015	+63%
Arrivals	6.425	+126%

Source: Statec, provisional figures.

LFT estimate	Mar 2026 vs. Mar 2025
Hotels ¹	ca. -3% to -4%
Campsites ²	+28%
Youth Hostels ³	-14%
All inbound (incl. non-paid) ⁴	-2%

¹ Based on LFT survey & MKG Hospitality (occupancy rate), and Sojern & Lighthouse booking data

² Based on Tommybookingsupport booking data

³ Actual data as reported by CAJL, arrivals

⁴ Based on mobile phone data (Editus/LFT).

Inbound overnight & same-day trips



Arrivals in paid accommodation (Statec data)	Jan-Feb 2026 vs. Jan-Feb 2025
Total inbound	+4%
FR	+3%
BE	-4%
DE	-5%
NL	-3%
UK	+13%
US	+88%
IT	-12%
ES	+10%
PT	+18%
CH	+35%
BR	+55%
LU	-33%

Overnight trips (Mobile phone data)	1.1.-18.4.2026 vs. 1.1.-18.4.2025	Easter 2026 vs. Easter 2025
Total inbound	+9%	-10%

Same-day trips (Mobile phone data)	1.1.-18.4.2026 vs. 1.1.-18.4.2025	Easter 2026 vs. Easter 2025
Total inbound	+13%	+5%

Same-day trips : origin country (Mobile phone data)	1.1.-18.4.2026 vs. 1.1.-18.4.2025
FR	+25%
DE	+8%
BE	-1%
NL	-1%
Others	+27%

Overnight trips : origin country (Mobile phone data)	1.1.-18.4.2026 vs. 1.1.-18.4.2025
DE	+3%
BE	+2%
FR	+19%
NL	-12%
UK	+41%
IT	+31%
ES	+16%
US	+14%
CH	+53%
PT	-11%

Hotels (key indicators)



HOTELS Luxembourg (MKG data)	Jan-Mar 2026	vs. Jan-Mar 2025
Occupancy rate	64,5%	+1,1%
ADR	144,9 €	-0,9%
RevPAR	93,5 €	+0,2%

Source: MKG Hospitality.



Special focus on the impact of the war in the Middle East on travel & tourism

Impact of the war in the Middle East on travel & tourism (I)

Tourism Economics have downgraded their **forecast for global international arrivals this year to 6%** (from 8% previously), reflecting the impacts of the Iran War on travel. These include less outbound travel from the Middle East and long-haul travel from Asia to Europe as transit through Gulf states is reduced, and higher air fares due to rising jet fuel costs and longer flight routes. Nevertheless, there has also been quick rerouting and higher capacity through alternative hubs (including secondary cities) and a spike in bookings from Asia in March to lock in lower fares.

Regional impacts are likely to vary widely: whereas **tourism to the Middle East** is expected to drop by more than 30%, travel demand should remain relatively **resilient elsewhere** despite slower economic growth and the surge in energy prices. For **Europe** (and partly also Northern Africa), the impact could even be **beneficial** (+8% forecast in international travel, vs. +6% forecast last quarter) as travellers shift away from the Middle East. Destinations with similar offerings (e.g. in Southern Europe) but stronger safety perceptions, better ease of access and better value for money will gain most.

Another impact for Europe could be **intra-European substitution** as more **European travellers avoid long-haul travel** due to **soaring energy prices**. Within Europe, these could also drive **nearby travel** (to neighbouring and domestic destinations). As a result, the share of **land-based transport modes** should rise to some extent even though air will remain the preferred mode for certain intra-European routes. Travellers will weigh the relative price of air fares against petrol or diesel costs when making travel decisions. European routes with fewer (low-cost) flight options may be seeing more substitution to alternative modes of transport.

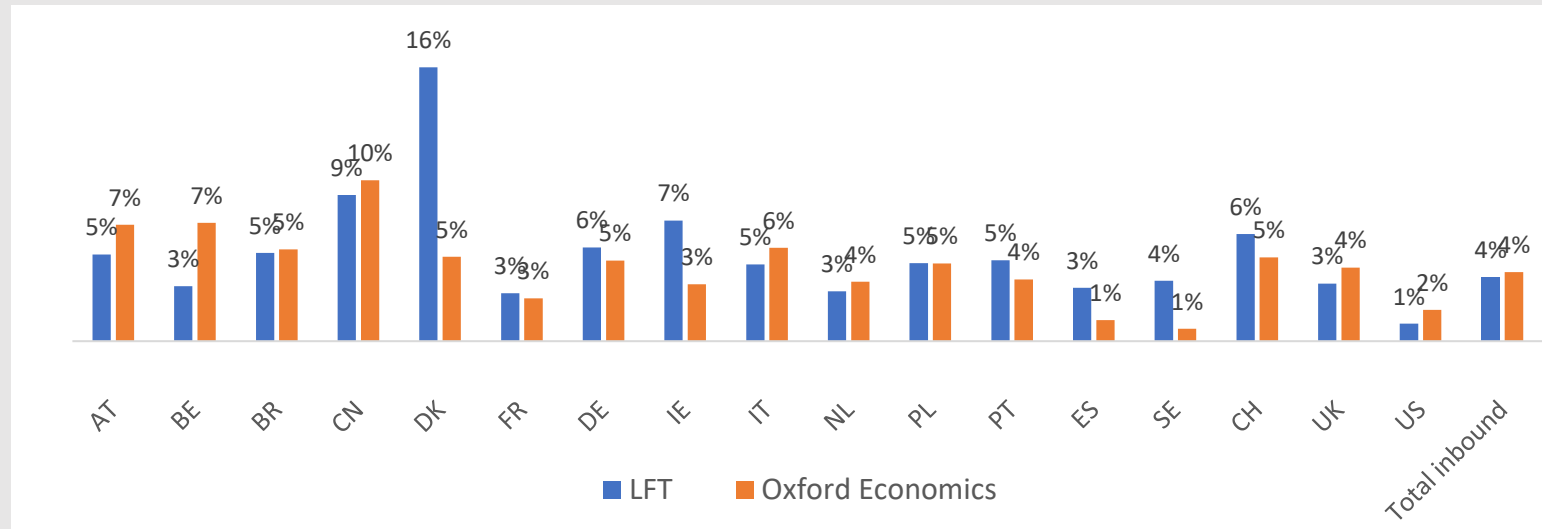
Short-haul travel thus could more than offset slower long-haul demand to Europe – which anyway may not drop equally from all markets: **US travel demand** is actually forecast to continue to rise in 2026, helped by larger tax refunds which could raise spending (and March retail data just released seem to confirm this), but travellers are sensitive to reliability and safety issues, something to be put forward by European destinations. **China outbound travel**, too, could represent an opportunity for European destinations as some Asian markets are more stable while others appear more cautious in the current context.

However, there will be **increasing competition among European destinations**, esp. with regard to nature, outdoor and cultural offerings. This is driven by the rise in short-haul intra-European demand, leading to a higher concentration of travel volumes. **Spending strategies** will be readapted: giving up travel altogether is not an option for most, but a further **shift towards more off-season travel, more affordable travel options as well as shorter or fewer trips** is likely – a pattern that mirrors the one previously observed in the context of high inflation in 2022-23 (but without the post-pandemic pent-up momentum back then).

Ease of access due to its central location close to large key European source markets (which contribute most to its demand), an offer in line with travellers' priorities and a relatively uncrowded destination are strong **selling points** in this context for **Luxembourg**. Therefore, reflecting general European demand trends, we have slightly **upgraded our forecast** for 2026. The chart on the following page shows the outlook for Luxembourg by source markets: we have included data provided by Oxford Economics (OE) as well as results from our own forecasting model which is based on economic, travel search and survey data. It appears that results are remarkably close, with a few exceptions (e.g., the better LFT forecast for Denmark results from the higher flight capacity, a factor not taken into account in OE's figures).

Impact of the war in the Middle East on travel & tourism (II)

Inbound arrivals to Luxembourg by source markets, current forecast 2026, % year-on-year change



The fact that Luxembourg is not always perceived as very affordable and that it is often visited in the context of additional trips, however, could be **potential risk factors** as travellers may cut on the number of planned trips. Whether these will **offset** potential growth factors previously mentioned remains **uncertain** and will also depend on future inflation trends. Indeed, it is important to note that all forecasts above are based on the **assumption of a 2-month-conflict**, which is becoming less likely as the Strait of Hormuz remains blocked and negotiations between the US and Iran so far appear unfruitful. **Duration of the war and associated fuel price effects** are indeed a **key determinant** of the economic and travel outlook. In a **scenario of a 6-month-conflict** and persistently higher energy prices and possible fuel shortages, the **impact on the economy**, but also on **tourism**, would be more **severe and uncertain**. It would cause global inflation to rise to almost 8% - close to the 2022 peak – resulting in recessions in most advanced economies, and significantly weakening the tourism outlook as well, with an expected **-1% drop in international global travel**. However, **travel to Europe would likely still remain in growth territory** (+3%) even under this downside scenario, although travel **hesitancy to book for the summer** season would significantly increase, the **economic factor** would become more impactful (as prices remain elevated, constraining available travel budgets) and most of the annual business from **Asia and Middle East to Europe would be lost**.

Higher air fares and more complex flight connections mean longer journey times and more uncertainty for travellers. As a result, travellers have adopted a **waiting attitude** and booking decisions are becoming made at shorter notice, with greater caution – and more selectively. Travel **insurance, flexible booking** options and **personalized advice** see higher demand, and offering more **flexible cancellation policies** could thus be an incentive to support new bookings. Generally, security, ease of “plannability” and frictionless experience will top low costs.



LFT Hotel & Camping Survey

LFT Hotel Survey

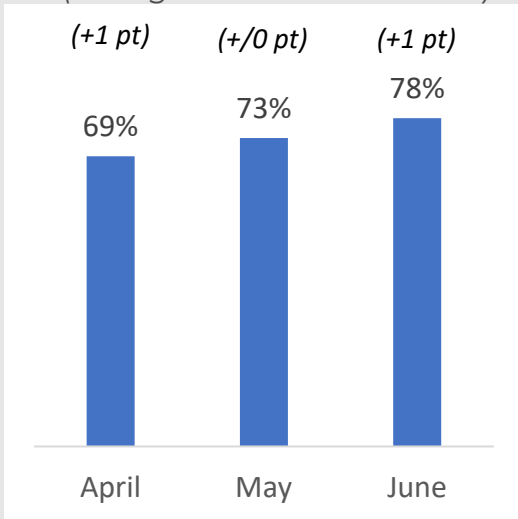
7 – 23 April 2026 : 46 hotels



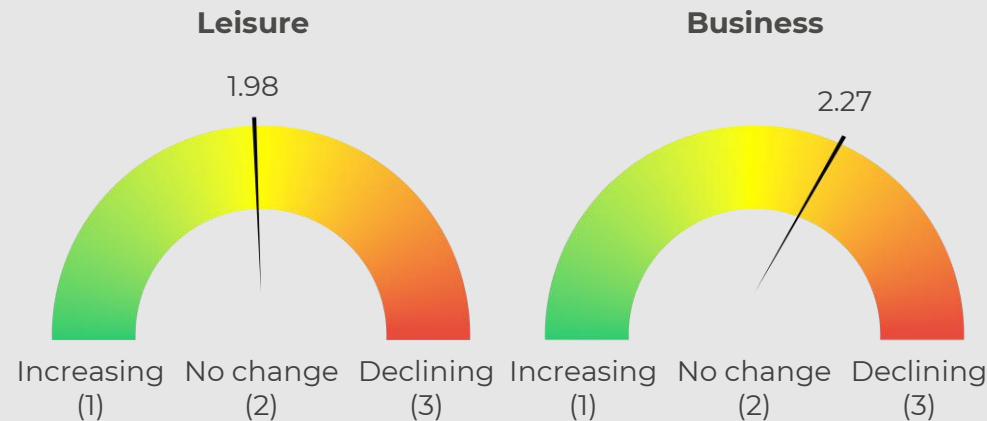
Our latest hotel survey points to largely **stable occupancy rates** for this spring, compared with the previous year. For **April and June**, a very marginal uptick in occupancy is forecast, for **May**, occupancy rates are expected to remain unchanged vs. last year. Growth prospects are slightly better for **Luxembourg City, North and East** regions, while a downturn in occupancy is expected for **South & Gutland** for all three months. There is a significant difference in expectations by purpose of visit: whereas **leisure** is forecast to **marginally increase** next months – particularly in North & East regions -, **business** travel is expected to **fall**, probably a consequence of the current geopolitical situation impeding long-haul and air travel. However, some hotels have reported recent cancellations of leisure groups from long-haul markets, too. More generally, 36% of respondents had to face a significantly higher volume of **cancellations** due to the war since the beginning of March, mainly in the **City and the South**.

Visitor outturn for the **Easter weekend 2026** was **marginally weaker** than for Easter 2025. Hotels in **Luxembourg City** rated this year's Easter performance **less well** than respondents across other regions. Prospects are less favourable for the **long weekends in May**, even though, again, hotels in **North & East** are **more optimistic** in this regard than their peers in the capital city.

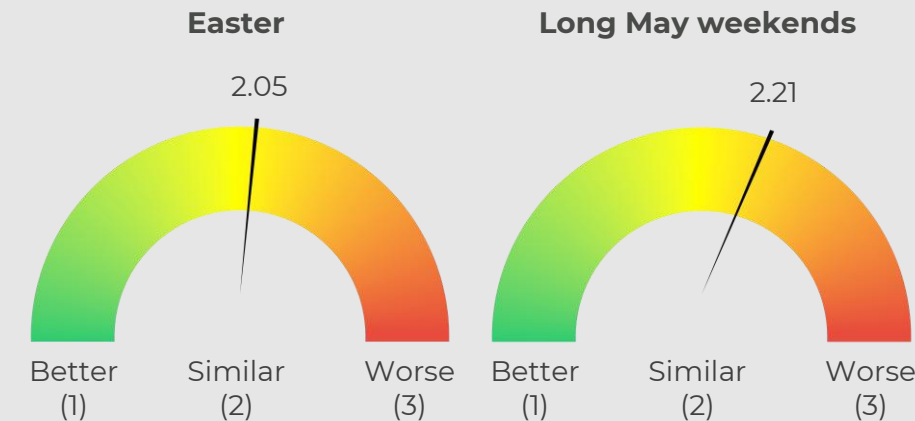
Occupancy rate forecast
(change vs. 2025 in brackets)



Share of bookings, trend next months 2026, vs. 2025 (% of respondents)



Bookings trends Easter & long May weekends 2026, vs. 2025 (% of respondents)



LFT Hotel Survey

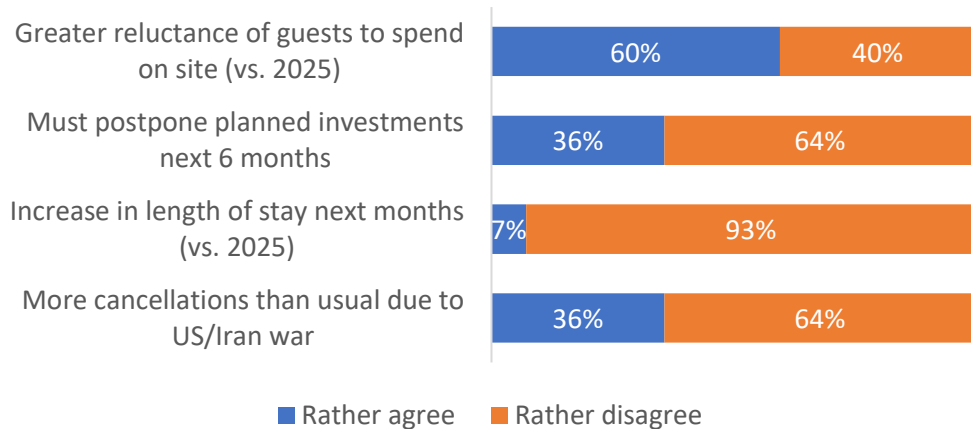
7 – 23 April 2026 : 46 hotels



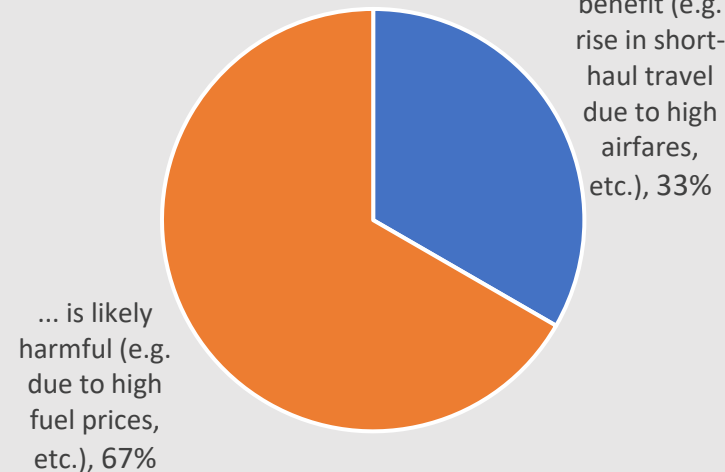
60% of hotels are expecting guests to **cut on ancillary expenditures**, however, this share dropped across all regions compared to previous surveys. Another encouraging trend is **investment propension** which seems to be improving as fewer hotels than last year have to postpone planned investments next months for cost reasons.

Asked about their impressions on the potential **impact of the Middle East conflict** and the energy crisis on tourism in Luxembourg, hotels largely expressed a **more negative view** than what we have outlined in our forecast on pages 11-12: two thirds of hotels believe the impact of the war, particularly the high fuel prices, will eventually be harmful for tourism, while only a third claim that this could be more than offset by rising short-haul travel. There are strong **regional differences** with regard to this question, with more hotels in North & East expressing a positive view on this topic. Overall, the more negative perception of the geopolitical and economic impact appears to be **dampening general optimism** regarding the 2026 season: 52% of hotels are still optimistic, but this represents a decrease of 20 points compared to the same time last year. In **Luxembourg City**, only 35% of hotels claim to be optimistic about this year's tourism season.

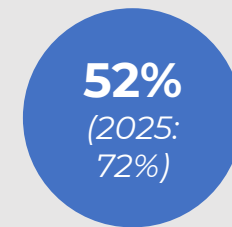
Economic statements (% of respondents)



Perceived impact of the US-Iran war and energy prices on tourism in Luxembourg...



Optimistic regarding season 2026



LFT Camping Survey

7 – 23 April 2026 : 15 campsites

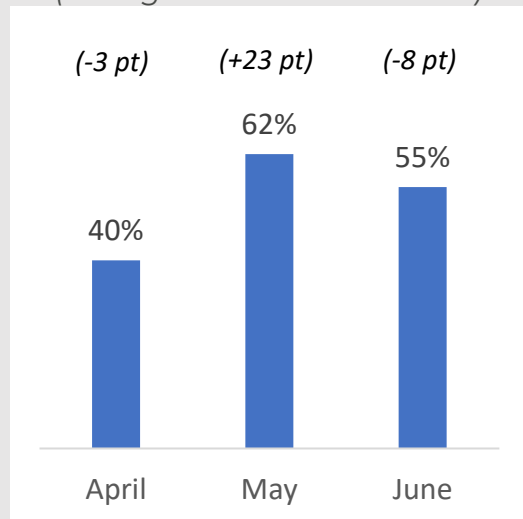


Respondents to our camping survey indicated an average **occupancy rate** of 40% for **April**. This is a slight decrease of 3 points vs. 2025 despite the fact that **Easter** was better evaluated than last year by 2/3 of respondents. In fact, some visitors for the Easter period already started their trip at end of March, thus positively impacting **March** occupancy and arrivals figures (see also page 23). Weather conditions have also played in favour of high occupancy at Easter this season.

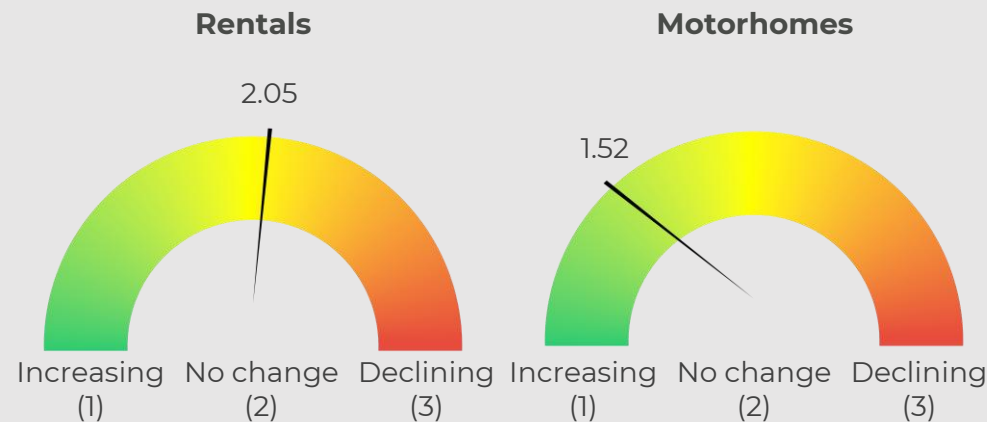
A slight improvement in occupancy is also forecast for **May-June**, reaching an average of about 60%. This reflects campsites' expectations for the **long weekends in May**, with 27% of respondents expressing better and 13% worse prospects (the rest claim this year's booking trends for May weekends to be in line with those recorded last year at this date). It should also be noted that occupancy tends to be very high each year for spring weekends, therefore further growth potential is limited, for capacity reasons.

No significant change is forecast with regard to **rental** bookings growth, whereas demand for **motorhome** stays is again set to increase over last year, with almost half of campsites recording growth in this sub-segment.

Occupancy rate forecast
(change vs. 2025 in brackets)



Share of bookings, trend next months 2026, vs. 2025 (% of respondents)



Bookings trends Easter & long May weekends 2026, vs. 2025 (% of respondents)



LFT Camping Survey

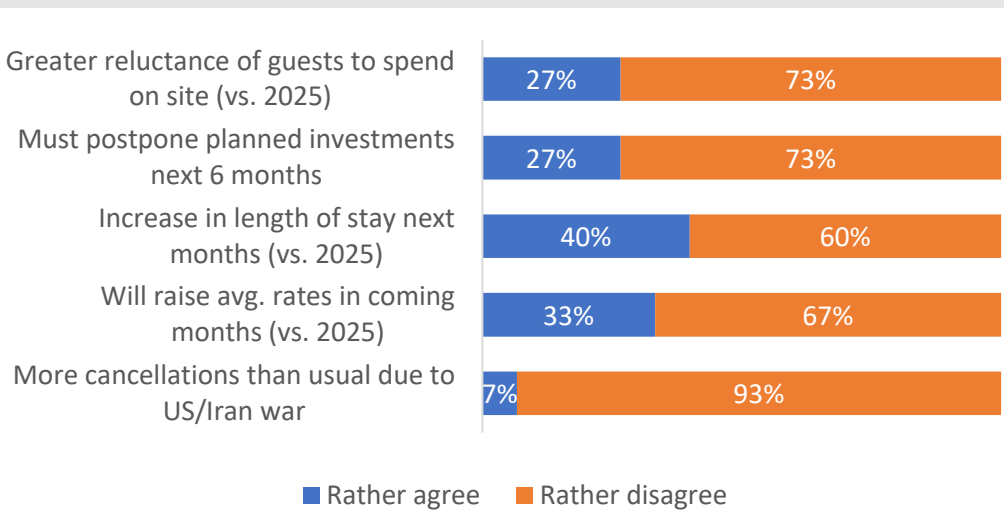
7 – 23 April 2026 : 15 campsites



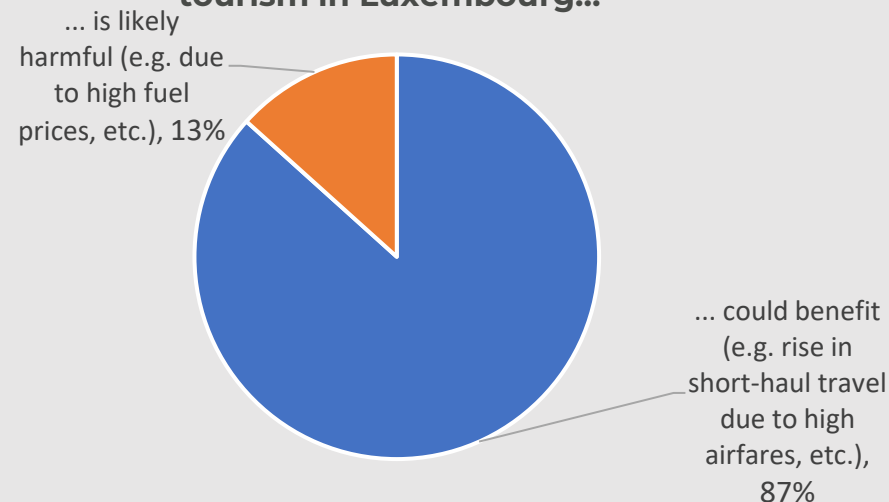
27% of campsites have reported a decrease in **on-site spending** compared to last year. A similar proportion have indicated that planned **investments** must be postponed due to high costs. These figures are consistent with previous survey results and are lower than those observed at hotels. Furthermore, an impressive 40% of respondents from the camping sector expect an **increase in the average length of stay** over the next few months compared to 2025, based on current booking trends. One third of respondents are planning to **raise rates**; this figure was 71% one year ago, suggesting a slowdown in asserting pricing power.

Only 7% of campsites have recently recorded unusually high levels of **cancellations** due to the US-Iran war. Indeed, unlike hotels, Luxembourg's campsites are much more optimistic about the potential impact of the crisis on tourism demand in Luxembourg. No less than 87% of respondents believe that the **shift towards nearby holidays** induced by the crisis should **benefit tourism** in the Grand Duchy, even though potential fuel shortages and consistently high fuel prices could jeopardise this. **Optimism** is rife in the camping sector, with 87% of respondents expressing a positive outlook for this year's season — a 5-point drop from last year's record-breaking 93%.

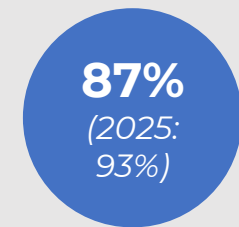
Economic statements (% of respondents)



Perceived impact of the US-Iran war and energy prices on tourism in Luxembourg...



Optimistic regarding season 2026





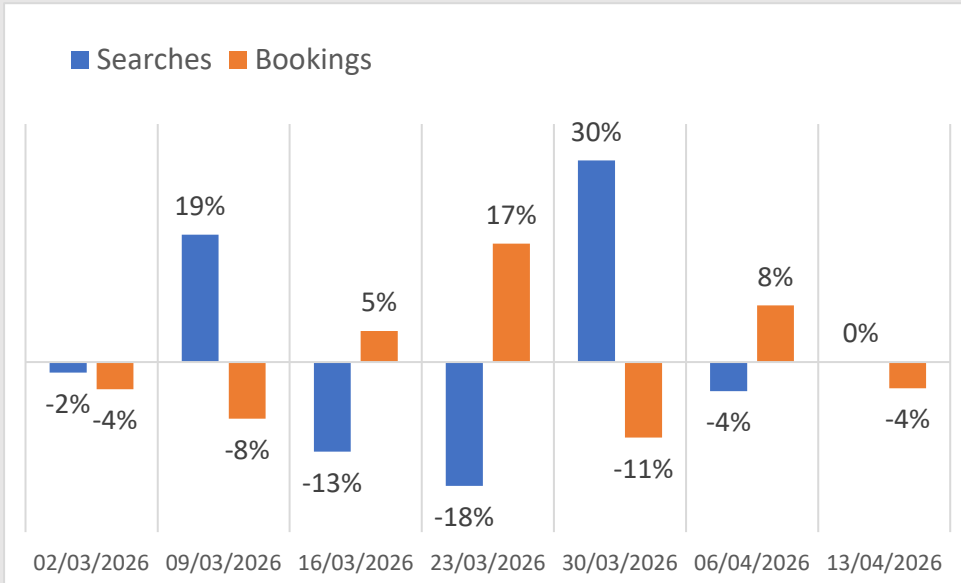
Search & Booking Data **(Hotels / Flights / Campsites / Travel Themes)**

Hotel Searches & Bookings

Luxembourg

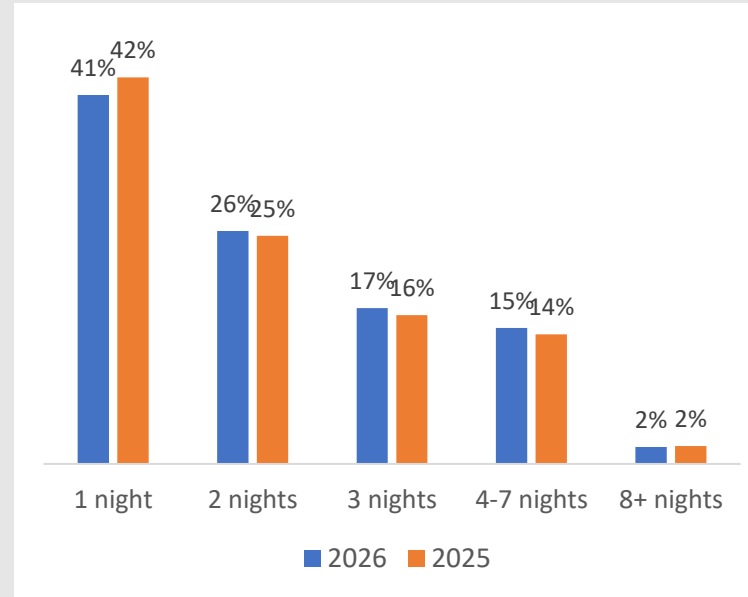


Hotel searches and bookings, all future arrivals, % week-on-week change



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

Average length of stay¹ for forward hotel bookings to Luxembourg made between 23.3.-19.4.



Hotel searches for all future arrivals, % change vs. 2025



Hotel bookings for all future arrivals, % change vs. 2025



Search levels for future hotel stays in Luxembourg have, on average, increased by 2% week-over-week since the beginning of March, albeit with strong volatility (see left chart). A peak in searches has been recorded in the week before the Easter weekend. **Weekly growth in booking** levels recorded throughout March and April has been flat, although bookings did pick up in the second half of March and at Easter. When **comparing** current search and booking trends **with last year**, however, we are observing a **decline of -3% (for searches) and -2% (for bookings)**, possibly related to a **drop in business travel demand**, and a **wait-and-see attitude or a drop in short, additional breaks among leisure travellers** in a context of rising energy prices and increasing demand volatility. Indeed, data shows that year-on-year searches are equally down for business and leisure travel demand. Lead time analysis shows an **increase in searches for stays longer ahead** (with notably demand for Q4 currently higher than last year), at the expense of last-minute stays, confirming travellers' hesitancy. By contrast, it is encouraging to notice that hotel **search trends** so far do **not point to a shortening in average length of stay** (see middle chart).

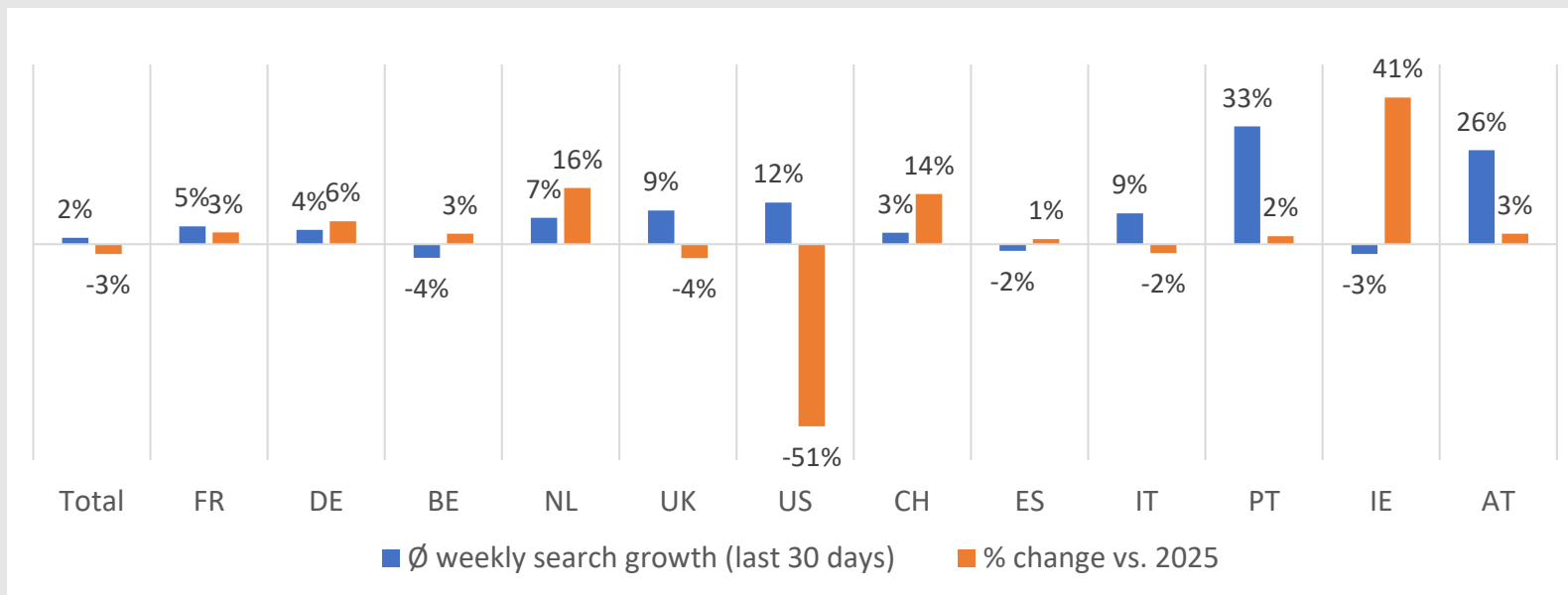
Both searches and bookings for future hotel stays in Luxembourg have trended slightly below the **Western European benchmark** since the start of the year, although the gap appears to be narrowing since the Easter period. When comparing with last year, the evolution for Luxembourg is similar to that of Western Europe.

Hotel Searches & Bookings

Luxembourg



Hotel demand for all future arrivals by top source markets,
% change week-on-week & vs. 2025



Hotel searches,
% market shares by source market

France	24%
Germany	15%
Belgium	14%
Netherlands	11%
United Kingdom	8%
United States	5%
Switzerland	3%
Spain	3%
Italy	2%
Portugal	2%
Ireland	1%
Austria	1%

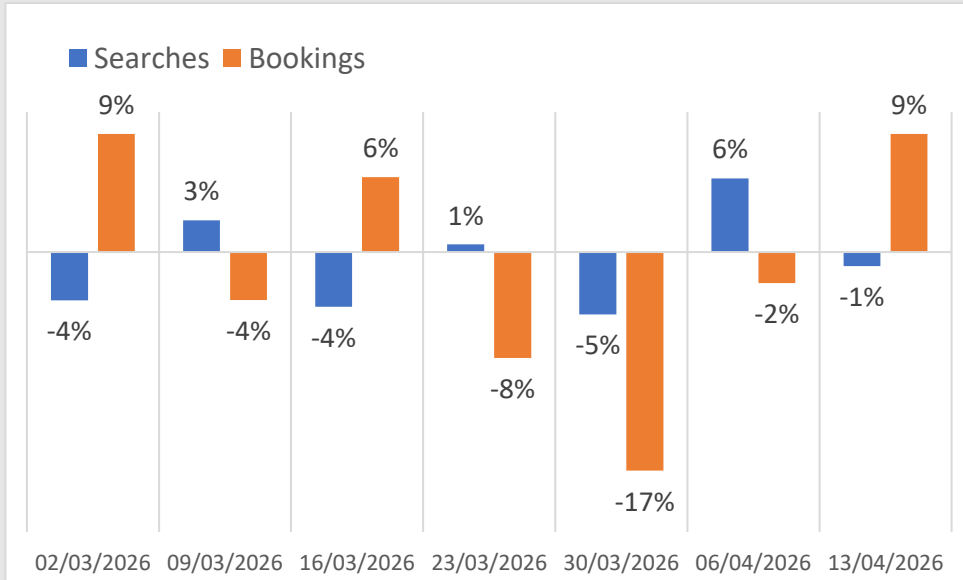
Over the past 30 days, **hotel searches** to Luxembourg grew by an average 2% each week, whereas aggregate searches for future stays are down 3% on last year. Looking at individual **source markets**, we can see a clear trends towards **year-on-year growth from nearby markets**, notably from Germany, Switzerland and the Netherlands (see chart). This may be a consequence of a more general demand shift to proximity destinations in the current context. Growth from **Belgium and Netherlands** could also be driven by the recent **VAT rise** in those countries, weakening the competitive position of domestic accommodation compared to nearby outbound destinations (but this could be offset by a more general drop in consumer spending due to higher cost of living). Hotel demand from most **other (medium-haul) European** source markets also remains positive, albeit only marginally, whereas a sharp decline in hotel searches has been recorded from the **US**. **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 are Wallonia, Antwerp, Lyon, Toulouse, Düsseldorf, Hamburg, Madrid, Manchester, Lausanne and Lisbon.

Flight Searches & Bookings

Luxembourg

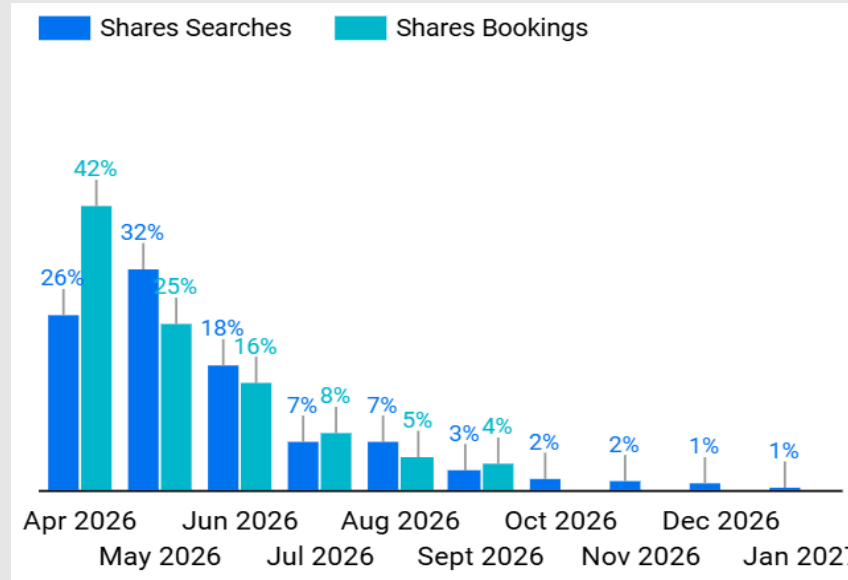


Flight searches and bookings, all future arrivals, % week-on-week change



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 6.4.-19.4., bookings last 6 months for travel until Sep 26.

Flight bookings for all future arrivals, % change vs. 2025



Flight searches for all future arrivals, % change vs. 2025



Searches and bookings for flights to Luxembourg recorded throughout March and into April have, on average, marginally decreased by 1% week-over-week. Again, as for hotels, this masks strong weekly volatility (see left chart). When **comparing with one year ago**, both searches and bookings for air travel to Luxembourg remain in healthy **growth** territory, improving by 8% resp. 10% - a figure that may seem surprising in the current context of higher air fares, but is mainly due to **intra-European capacity expansion** from several source markets (see next page), and is more driven by **business travel** (+22% bookings) than by leisure demand.

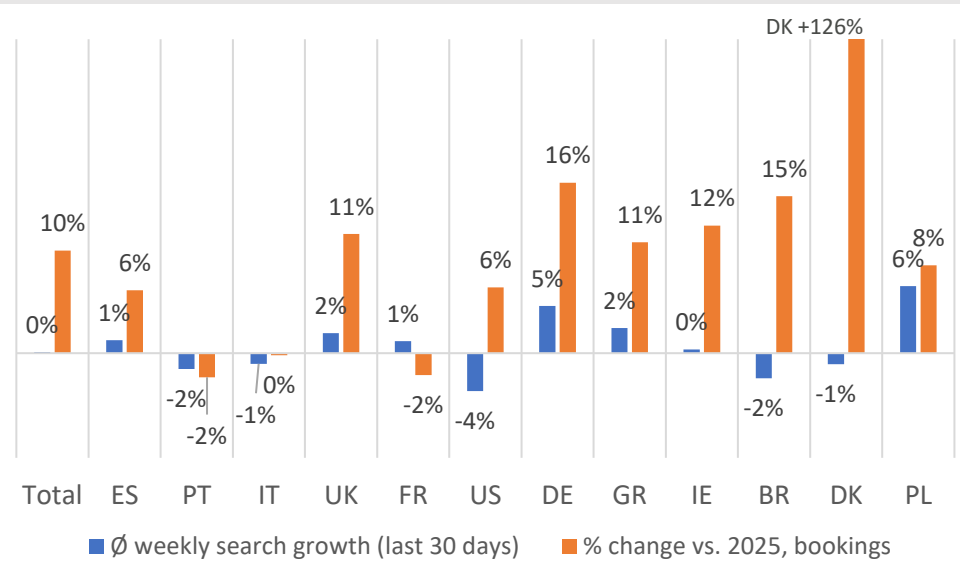
As with hotels, **lead times** for air travel are **longer**, as on-the-book volumes for Q4 and into 2027 show double-digit growth vs. last year. However, also demand for **May-June** is currently 9% above 2025, likewise driven by **business travel** demand growth.

Flight Searches & Capacities



Luxembourg

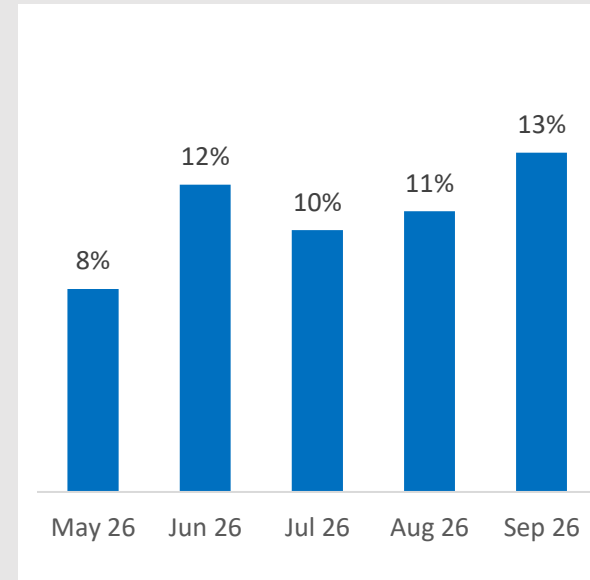
**Flight demand for arrivals next 6 months
by top source markets,
% change searches week-on-week & bookings vs. 2025**



**Flight searches,
% market shares
by source market**

Spain	18%
Portugal	17%
Italy	12%
United Kingdom	11%
France	10%
United States	7%
Germany	5%
Greece	4%
Ireland	3%
Brazil	3%
Denmark	3%
Poland	3%
Austria	2%

**Seat capacities to Luxembourg
by arrival months,
% change vs. 2025**



**Flight connectivity
to Luxembourg**

	May 2026- Sep 2026	Change year-on- year
Countries connected	32	+1
Avg weekly flights	628	+51
Seats	1.707.019	+10%
Airlines	19	+3
Top 5 origins, seats (% year-on-year): 1. ES (+9%), 2. PT (+2%), 3. IT (+3%), 4. DE (+4%), 5. UK (+14%)		

As mentioned, **year-on-year growth rates of flight bookings** tend to correlate with **capacity expansion**. This is notably the case for air travel demand from **Spain, the UK, Ireland and Denmark** as SAS launches a direct connection with Copenhagen. Strong growth vs. 2025 is also currently recorded from Germany, both in the leisure and business travel segment. By contrast, **weekly search growth** during the past month was flat across most source markets, indicating a **potential slowdown in new bookings** for the coming weeks, likely due to soaring air fares and decreasing consumer sentiment. **Cities and airports** that have contributed significantly to recent search growth for air travel to Luxembourg include Sevilla, Naples, Nantes and Munich.

Connectivity continues to improve, as **seat capacities** for travel until September expand by 10%, with growth particularly strong for June and September. The data does not yet take into account the recent cancellation of the Lufthansa Cityline service, which is likely to have a notable impact on future demand from Germany. Airlines continue to adjust to the current situation, by cutting flights or adding fuel surcharges to ticket prices.

Major **airports with disproportionate capacity growth** to Luxembourg are Manchester, Madrid, Thessaloniki, Copenhagen (Luxair and SAS), Zurich (Swiss), London (British Airways), Istanbul (Turkish) and Helsinki (Finnair and Luxair).

Campsites Bookings

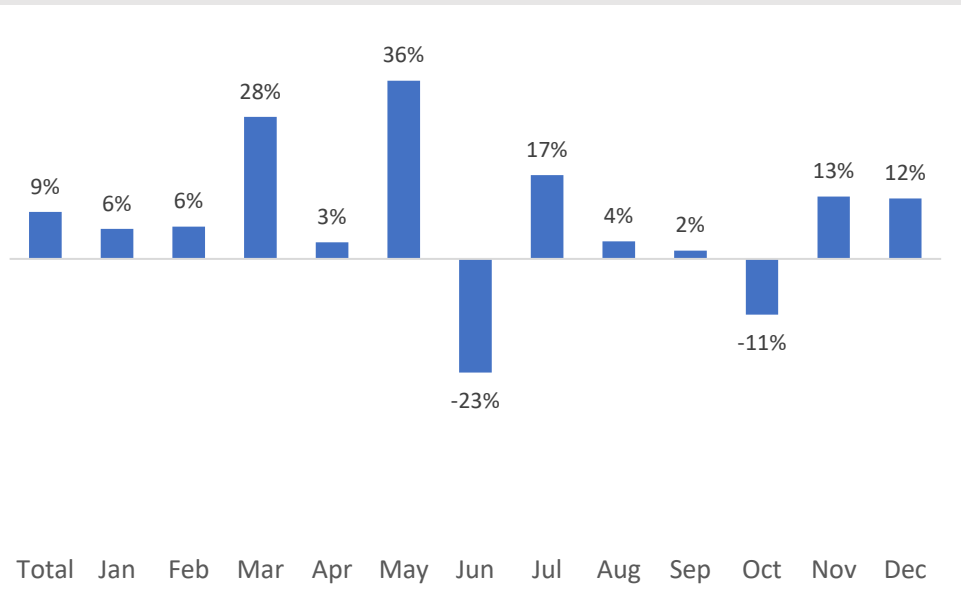
Luxembourg



Bookings on campsites for stays in **March-April** are up **9%** on average over last year, according to our data provider, and confirming the largely positive feedback for Easter submitted through our camping survey (see page 16). The outlook is even better for next months: current on-the-book figures for stays **next 3 months show 12% growth** vs. 2025. Forward bookings for stays between May and August are roughly up 10% over last year; only demand for **September-October** currently lags levels recorded last year at this date.

Demand for the **coming 3 months** is increasing particularly strongly from **Germany, Switzerland and the UK** (all exceeding +20%). Growth from Belgium (+10%) and the Netherlands (+7%) also remains healthy for the late spring and early summer – but when looking at the entire year 2026, demand growth from the **Netherlands** appears subdued (+2%), due to a **fall in periods January-April (-5%) and September-December (-8%)**. This contrasts with **double-digit growth** for the whole year 2026 **from Germany and from the domestic** market.

Campsite bookings for arrivals March-August 2026 by month of arrival (*), % change vs. year ago



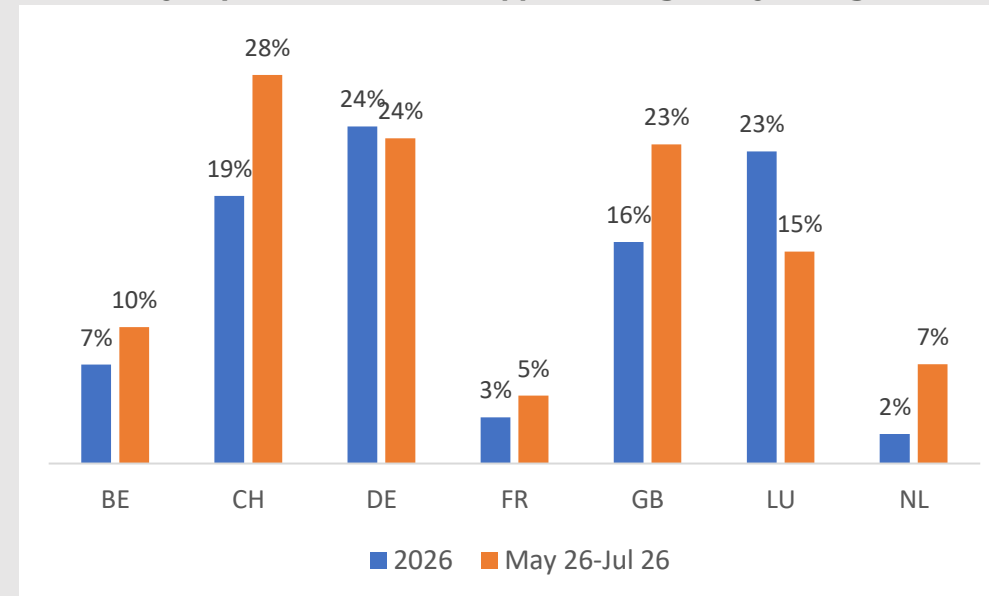
Campsite bookings for arrivals 2026 (*), % change vs. year ago



Campsite bookings for arrivals May-July 2026 (*), % change vs. year ago



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



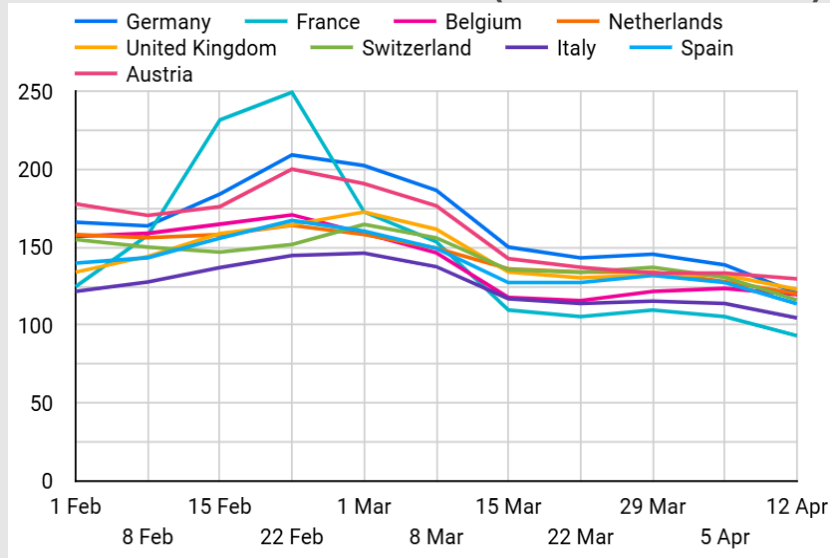
(*) as of 22.4.2026.

Travel Themes on Google



Evolution of relative search interest on Google in main source markets

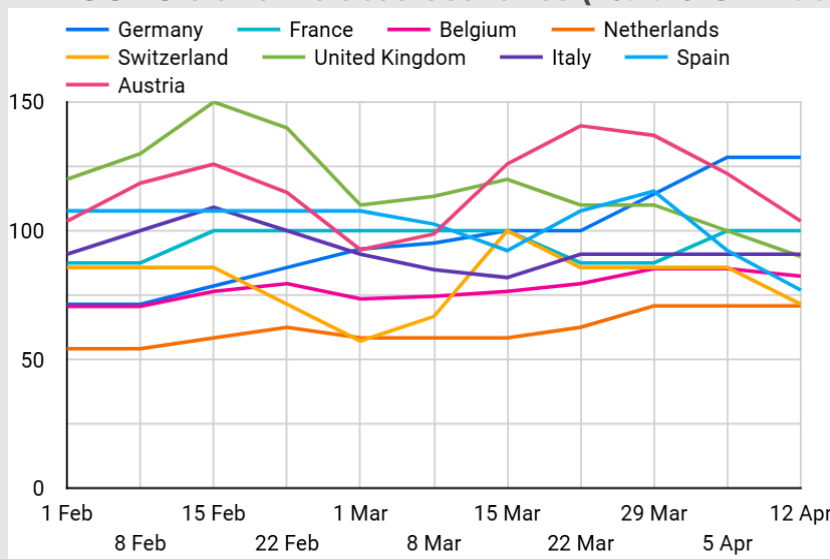
ALL travel-related searches (20.4.2025 = index 100)



High interest and intention to travel despite the current economic and geopolitical context is obvious when looking at recent **travel-related searches on Google**. Whereas the spike in searches before the end of March was driven by users looking for Easter getaways, it is more crucial to observe that, even at **mid-April** (when comparing post-Easter periods in both 2026 and 2025), **demand is higher by about 15%-20%** across most source markets, with the exception of Italy (+5%) and France (-6%). This highlights the relative resilience of the tourism sector and the importance consumers attach to it. For **destination Luxembourg**, recent search trends on Google also show a clear (and more last minute) pre-Easter peak. Relative search interest for Luxembourg is nevertheless **slightly lower than last year** in most source markets, with the exception of Germany and France. The good news however is that demand **from Belgium and Netherlands**, while still down year-on-year, **recently regained momentum**.

After a strong start to 2026, year-on-year growth in Google searches for **hiking** varies depending on the source market. It is increasing in Belgium, the Netherlands, the UK and Spain, but declining in Germany, France, Italy and Austria. Similarly, Google searches for **youth hostels** and **holiday homes** are trending differently in various markets. Search interest for **city breaks** on Google is improving vs. last year in most source markets. Compared to April 2025, more **British, Spanish, Italian and Swiss** users are searching for **city trips to Luxembourg** on Google.

LUXEMBOURG travel-related searches (20.4.2025 = index 100)





E-Reputation

E-Reputation Luxembourg

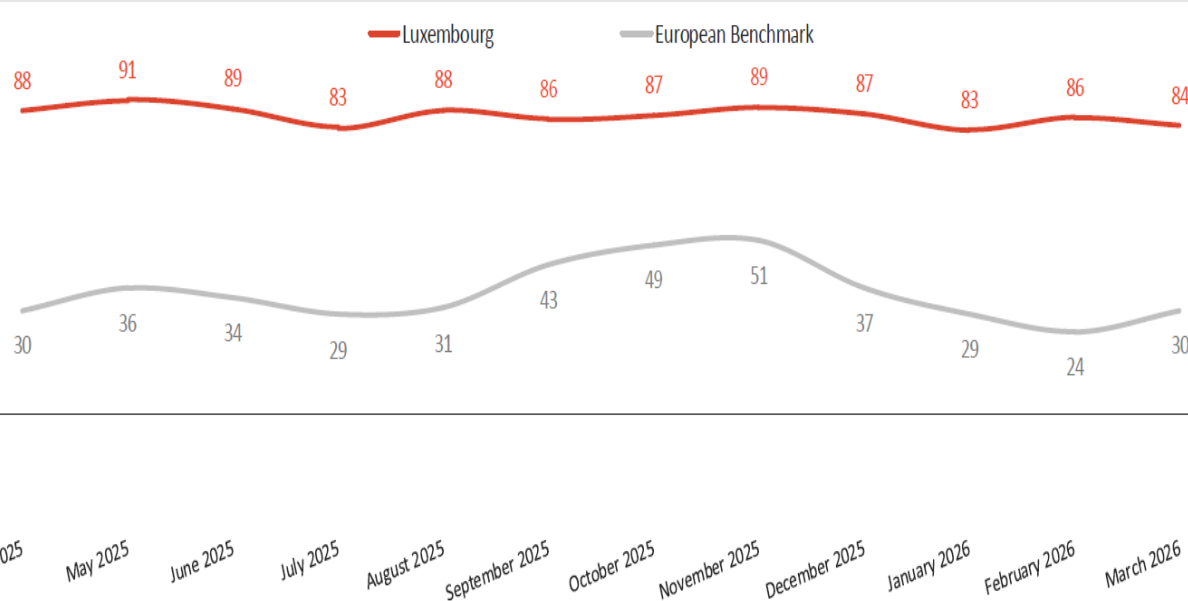
Conversations on Social Media



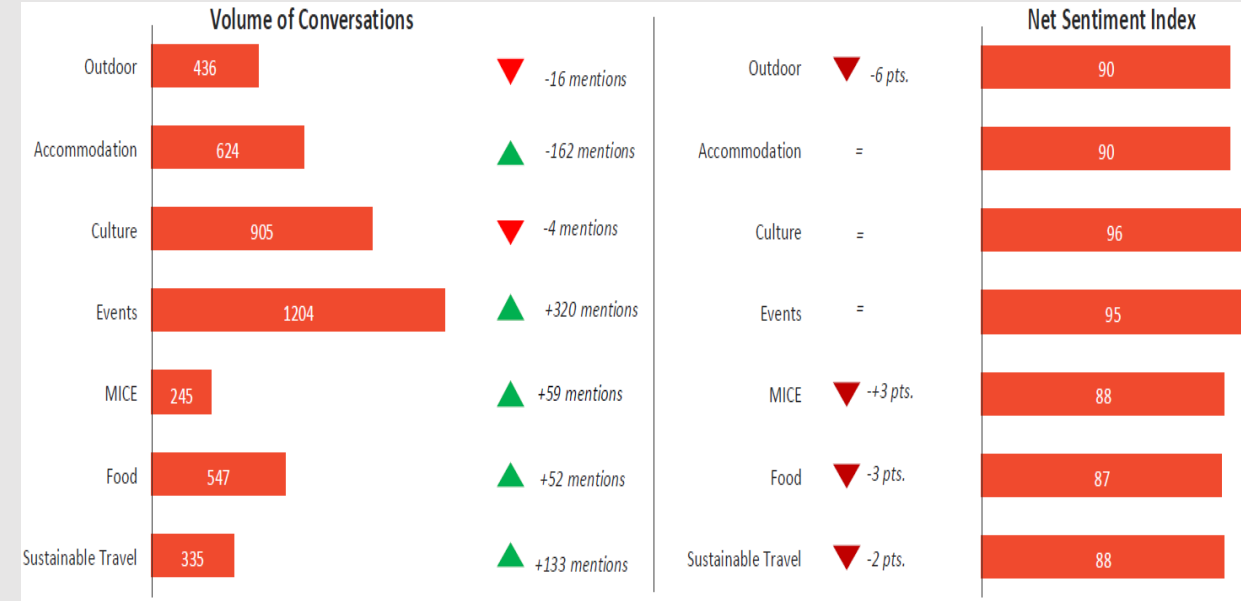
In March 2026, **Luxembourg's Net Sentiment Index** - which measures the difference between positive (+100) and negative (-100) travel-related mentions - continued to largely **exceed the European benchmark**, reaching +84, even though this represents a slight decline over February. This result highlights Luxembourg's relative online reputational strength in a still weaker European environment. However, it is also worth noting that **Europe's sentiment** actually increased vs. February despite the worsening geopolitical context in March: only 3% of total travel-related conversations in Europe referred to the **Middle East conflict**, mainly focusing on rising travel costs and logistical challenges in air travel.

Positive sentiment for destination Luxembourg in March was driven by **culture and events**, stabilizing at very high scores, as events and sustainable travel also generated far more conversation volume than the previous month. Some mainstream **topics driving positive e-reputation** in March include trail accessibility in Mullerthal, traditional gastronomy and contemporary art, while more niche themes were parks, expat events and folklore events Buergbrennen and Emaischen. Sentiment scores for outdoor activities softened compared to February as some comments criticized poor maintenance of B1 hiking trail in Mullerthal region – but overall, the perception remains very positive, with a score of +90.

Net Sentiment Index of Luxembourg and Europe



Volume of mentions and Net Sentiment Index of Luxembourg by main topics, March 2026 (vs. February 2026)



E-Reputation Luxembourg

Visitor Experience

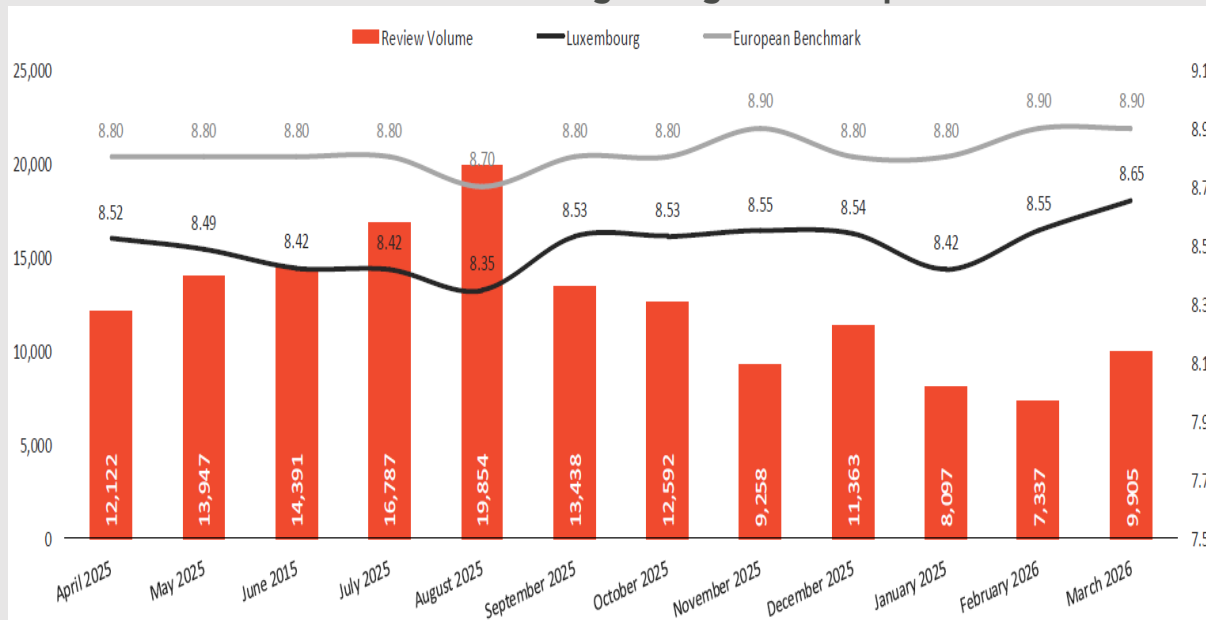


The **number of reviews** published on **rating platforms** (Trip Advisor, Google, Booking etc.) grew in **March** compared to February, with Luxembourg's overall **satisfaction rating** improving sharply. The European benchmark remained stable; however, Luxembourg continues to rate below its European competitors.

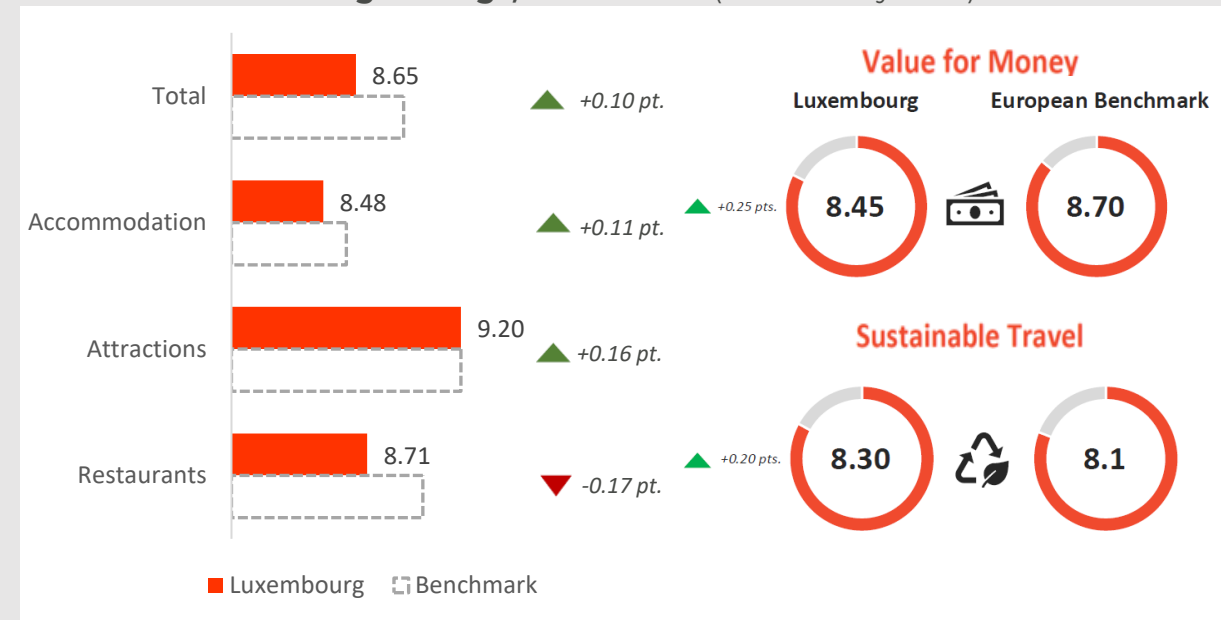
Accommodation ratings in Luxembourg improved in March, with hotels and campsites increasing the most. **Attraction ratings** for Luxembourg also improved, now matching the European benchmark. Seven out of ten subcategories showed better ratings than the previous month, with Nature, Parks & Gardens and Culture scoring highest and also showing strongest monthly growth, jointly with leisure sites. **Restaurant ratings** in Luxembourg, by contrast, declined in March after a temporary improvement the previous month.

Visitor perception of Luxembourg's **value for money** increased by 0.25 points, driven by accommodation. Sentiment about **sustainable travel** also improved significantly, largely exceeding the European benchmark. Again, the accommodation sector showed the strongest growth here.

Volume of reviews and avg. rating on online platforms



Average ratings, March 2026 (vs. February 2026)





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