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Luxembourg for Tourism

Latest travel insights

Update – 27 September 2024

Contents

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Executive Summary

Executive Summary (1/2)

Performance 2024 year-to-date, vs. 2023 (provisional figures)

- Luxembourg, arrivals, Jan-Jul 2024: hotels +4% ; campsites -4% ; youth hostels +5% ; other paid -2%.
- Luxembourg, LFT estimate for Aug 2024: hotels +5%, campsites +2%, youth hostels +5%.
- Luxembourg, hotels, Jan-Jul 2024 : occupancy rate 72% (+4%), RevPAR 111€ (+7%).
- Luxembourg, visitors, Jan-Aug 2024: tourist infos +18% (Lux-City), -1% (other) ; castles -0% ; museums +2% ; leisure sites -2%.
- Luxembourg, arrivals, Jan-Jul 2024, key source markets (all paid accommodation): all inbound +2%, NL -3%, DE -0%, BE +1%, FR +8%, UK -1%.

LFT Hotel & Camping Survey

- Hotel occupancy rates: 74% (Aug), 78% (Sep), 76% (Oct). Year-on-year increase (pts.) : Aug +6, Sep +4, Oct +2. Growth in August across all regions, driven by strong inbound demand. Growth in Sep-Oct mainly in Luxembourg City (which also scored highest growth in Aug).
- Leisure more frequently mentioned as driver to overall demand growth for Sep-Oct than business (esp. in Luxembourg City).
- Camping occupancy rates: 86% (Aug), 42% (Sep), 24% (Oct). Year-on-year increase (pts.) : Aug +1, Sep -8, Oct -5. Following a drop in arrivals in Jan-Jul, occupancy in August was very high while prospects for late season are weaker again, but this compares with a record season 2023 (esp. in autumn).
- Nearly half of hotels and campsites had to face at least some weather-related losses this summer, but roughly 10% also welcomed significantly more guests escaping too big heat elsewhere in Europe.
- Year-to-date turnover increased by 12% in hotels and 23% on campsites but 59% of hotels and 41% campsites also claim that guests have become more reticent to spend on-site.
- Satisfaction with this year’s season is high and has improved compared to our previous survey (as expressed by 80% of hotels and 94% of campsites).

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Executive Summary (2/2)

Current search & booking data

- Recent week-on-week search trends for future stays in Luxembourg since mid-August: +3% (hotels), +2% (flights). Hotel & flight searches have declined throughout August and then picked up in September, while bookings have continuously improved in most weeks during that period.
- Hotel searches for future stays are 10% higher than in 2023, essentially for trips in Sep-Oct. Growth potential for further new business travel bookings over the coming months.
- Flight bookings for future stays: +11% vs. 2023 (on a par with 2019). Contrary to hotels, lead times for air travel have extended, with more searches already having been recorded for stays in early 2025. Strong year-on-year growth for leisure air travel between Nov-Feb.
- Strongest year-on-year hotel and flights demand growth from FR, US, ES, IT (and UK for hotels and PT for flights).
- Google travel searches are higher than last year among Belgians, Britons, Italians, Spanish and Austrians. Most of these source markets – joined by the Germans and the French – also yielded year-on-year search growth for destination Luxembourg.
- Search interest on Google for hiking increases in BE, NL, UK, IT, for youth hostels it improves in DE, FR, UK, and for city trips it increases in FR, NL, UK.
- Search trends for Luxembourg City have been more positive in a large number of markets, as growth vs. 2023 is recorded from NL, CH, AT, IT, ES.

Luxembourg's E-Reputation

- In August, Luxembourg's Net Sentiment Index, measuring the polarity of travel-related online conversations, reaches its highest level since November, and also continues to largely outperform the European benchmark. More conversations in August than last year revolved around food & wine and accommodation, but also outdoor and culture remained essential positive reputation drivers.
- satisfaction scores were lowest in August, a result of higher tourism pressure on sites and accommodations and weaker visitor experience, esp. also with regard to restaurants.
- Luxembourg's sustainability perception reached a new peak in August, far ahead the European benchmark thanks to a strong improvement in the accommodation sector.

Recent Performance Data

Hotels & Campsites

Nights & Arrivals

HOTELS *(Statec data)*	Jan-Jul 2024	vs. Jan-Jul 2023
Nights	1.110.625	+4,5%
Arrivals	609.744	+4,4%

Source: Statec, provisional figures.

YOUTH HOSTELS	Jan-Jul 2024	vs. Jan-Jul 2023
Nights	93.804	+1,8%
Arrivals	50.709	+4,6%

Source: CAJL.

LFT estimate	Aug. 2024 vs. Aug. 2023
Hotels[1]	+5%
Campsites[2]	+2%
Youth Hostels[3]	+5%

[1] Based on LFT survey (occupancy rate) and Sojern booking data
[2] Based on LFT survey (occupancy rate) and Tommy Booking Support booking data.
[3] Actual data as reported by CAJL, nights.

CAMPSITES *(Statec data)*	Jan-Jul 2024	vs. Jan-Jul 2023
Nights	699.779	-16,8%
Arrivals	176.642	-4,2%

Source: Statec, provisional figures.

RENTALS *(Statec data)*	Jan-Jul 2024	vs. Jan-Jul 2023
Nights	69.417	-6,8%
Arrivals	18.976	-2,2%

Source: Statec, provisional figures.

Arrivals by source markets

Arrivals in paid accommodation *(Statec data)*	**Jan-Jul 2024 vs. Jan-Jul 2023**
Total inbound	**+2%**
NL	-3%
DE	-0%
BE	+1%
FR	+8%
UK	-1%
US	+16%
CH	+0%
IT	-3%
ES	-5%
PT	-9%
DK	-14%
LU	+6%

Please note that due to a number of technical issues currently being investigated by our data provider, we are unable to include mobile phone data figures in this report.

Source: Statec.

Hotels & Short-term Rentals

Occupancy rate, ADR, RevPAR

Luxembourg City ***(MKG data)***	**Jan-Jul 2024**	**vs. Jan-Jul 2023**
Occupancy rate	72,8%	+3,7%
ADR	152,1 €	+2,8%
RevPAR	110,8 €	+6,6%

Source: MKG Hospitality.

SHORT-TERM RENTALS (Sharing Economy) (*)	**Jan-Jun 2024**	**vs. Jan-Jun 2023**
Occupancy rate	44,3%	-24,3%
ADR	185,8€	+59,0%
RevPAR	82,2€	+20,4%

(*) Data refers to short-term rentals on Airbnb, HomeAway, VRBO. Source: Lighthouse/ETC.

Tourist Info & Attractions

Visitors, January-August 2024

Tourist Infos	**vs. Jan-Aug 2023**
Luxembourg City	+18%
Other regions	-1%

Tourist Attractions	**vs. Jan-Aug 2023**
Castles	-0%
Museums	-2% / +2%[1]
Leisure sites	+10% / -2%[2]
Guided tours	+17% (City) / -10% (ORT)

[2] Without Musée Européen Schengen & Musée Résistance Esch (partly closed in 2023 & 2024 respectively.

[2] Without Casemates (partly closed in 2023 (Bock).

Source: LFT survey.

LFT Hotel & Camping Survey

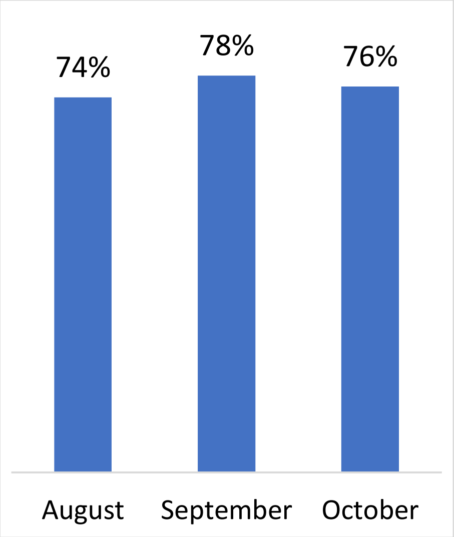
LFT Hotel Survey

5 – 18 September 2024: 49 hotels

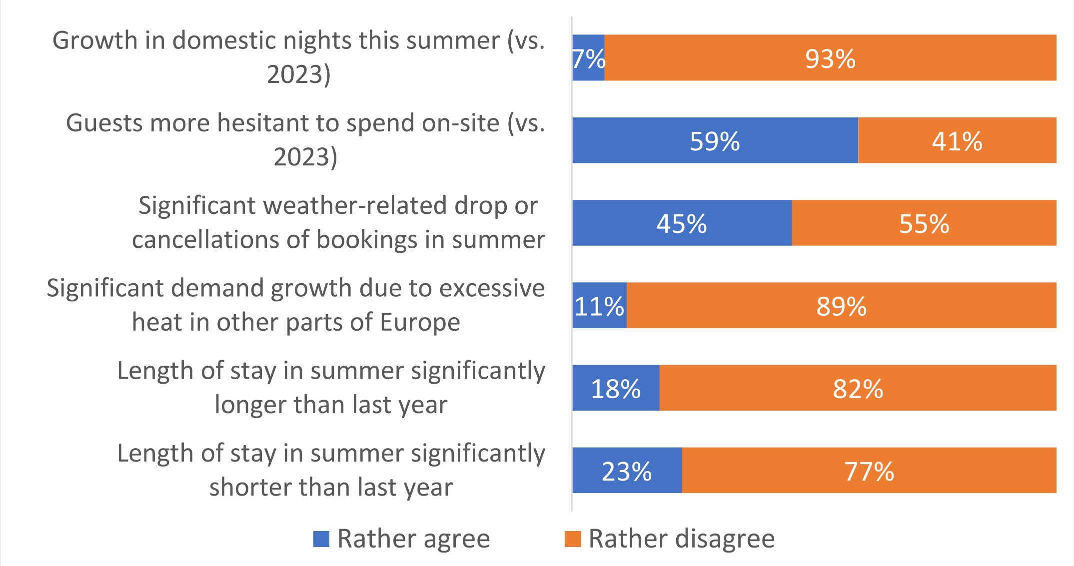
According to LFT's latest industry survey, **August** turned out to be an excellent month in terms of **hotel occupancy**, reaching 74%, an impressive 6-point-increase over last year. The peak summer season appears to have been particularly good in the capital where occupancy rate increased by 7 points (72%), but occupancy levels in August also improved in the North & East regions (83%; +3 pts.). This also pushed up levels of overall **satisfaction** with this year's season (as expressed by 80% of respondents). **Prospects** for September and October are almost as encouraging, with an improvement of 4, resp. 2 points expected in terms of occupancy (78%, resp. 76%). The forecasted occupancy growth for Luxembourg City largely exceeds that for other regions in September (+6 pts.; 79%), while being slightly higher in October (+3 pts.; 78%). Hotels in other regions are expected to achieve very slight occupancy rate growth of about 1 point in September-October. Interestingly, a larger number of hotels is currently seeing **leisure** rather than business demand as a driver to overall booking growth for September-October, and this is particularly true for the capital city.

Growth in hotel bookings in August was driven by stronger **inbound** demand, as only very few respondents could see any growth in domestic nights. Almost half of hotels – more in North & East regions - had to face some **weather**-related losses this summer, but 11% also welcomed significantly more guests escaping too big heat elsewhere in Europe. In net terms, average **length of stay** this summer likely remained nearly equal to last year. While year-to-date **turnover** increased by 12% as rates have risen (+17% in Luxembourg City, +5% in other regions), a majority of hotels also claims that clients have become more **reticent to spend** on-site.

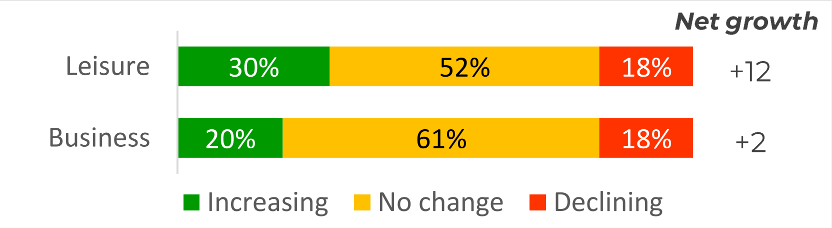
Occupancy rate



Economic statements (% of respondents)

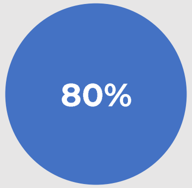


Share of bookings, trend vs. 2023 (% of respondents)



Turnover, Jan-Aug 24
% vs. 2023

Satisfied with season 2024



Source: LFT survey.

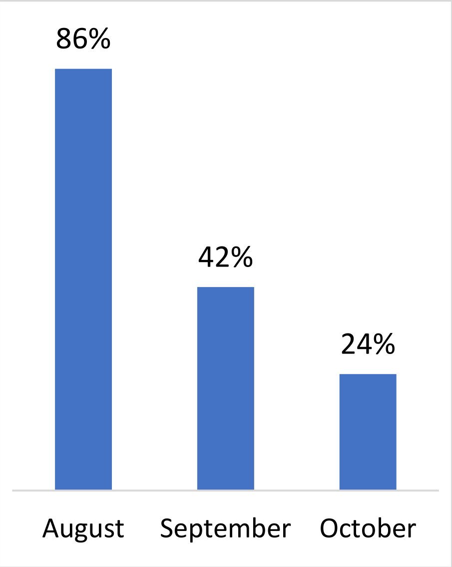
LFT Camping Survey

5 – 18 September 2024: 17 campsites

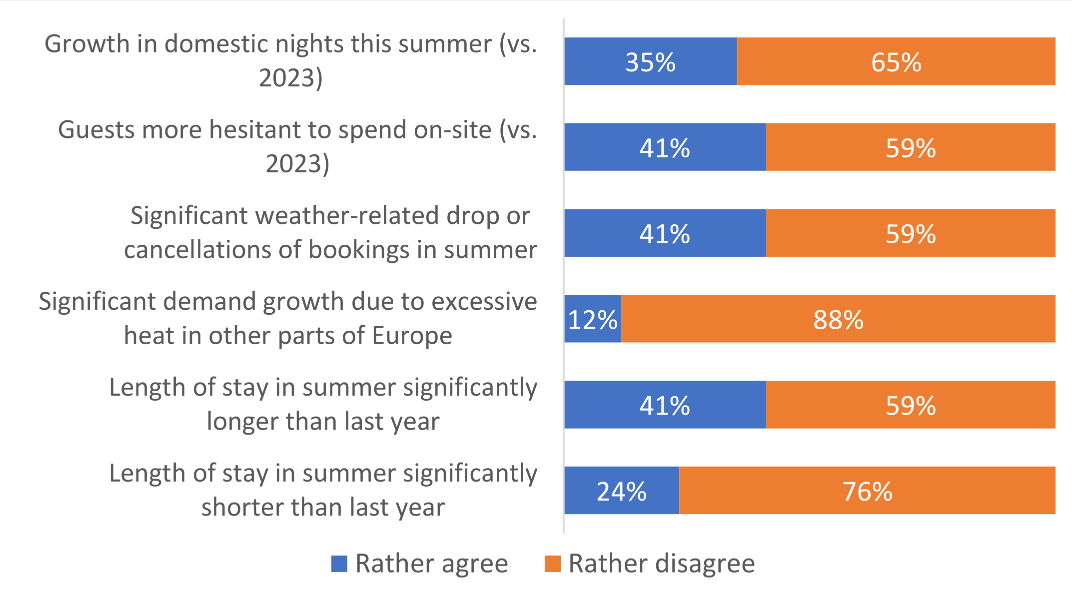
As shown by Statec data (see page 7), the camping sector faced a slight drop in arrivals coupled with a shorter length of stay until July. This has followed record seasons in 2022-23 and was also partly due to adverse weather conditions. However, it appears that **occupancy in August** was very high and on a par with the previous year, according to LFT's latest survey respondents. **Prospects** for September and October are lower than in 2023 but this compares with exceptionally high levels of occupancy last year. With year-to-date **turnover** levels no less than 23% higher than in 2023, these results help explaining the fact that 94% of respondents are **satisfied** with the season 2024 so far. However, it is important to remember that revenue growth masks high operating costs, which have been exacerbated by recent increases in water and waste costs.

As opposed to hotels, a much larger share of campsites (35%) noticed growth in **domestic** bookings this summer. In contrast to trends earlier this year, **length of stay** does not appear to have decreased during the summer, with more campsites experiencing an increase rather than a decrease. About 40% of respondents had to deal with an increase in guests' **reluctance to spend** on-site (although this share is significantly lower than for hotels). Around 40% of campsites also experienced some cancellations or reduced bookings due to **weather** conditions, a share perhaps surprisingly not higher than in hotels. With regard to autumn prospects, **rentals** and **motorhome** segments, once again, could be the driver of demand growth, according to a net majority of survey respondents.

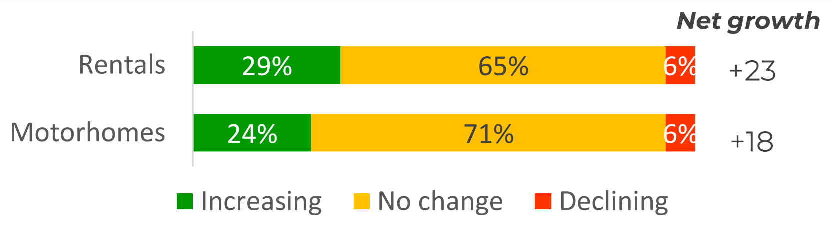
Occupancy rate



Economic statements (% of respondents)



Share of bookings, trend vs. 2023 (% of respondents)



Turnover, Jan-Aug 24
% vs. 2023

+23%

Satisfied with season 2024

94%

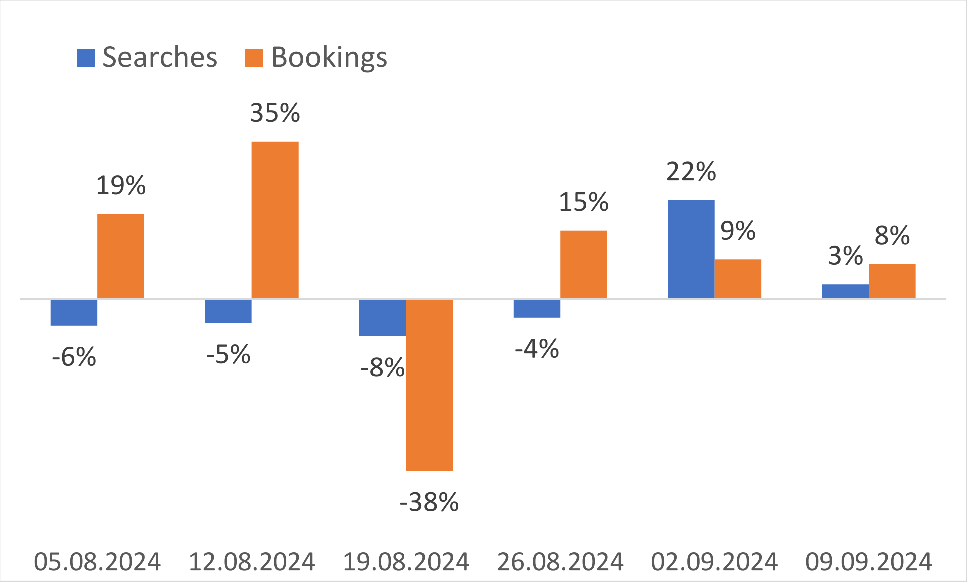
Source: LFT survey.

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

Hotel Searches & Bookings

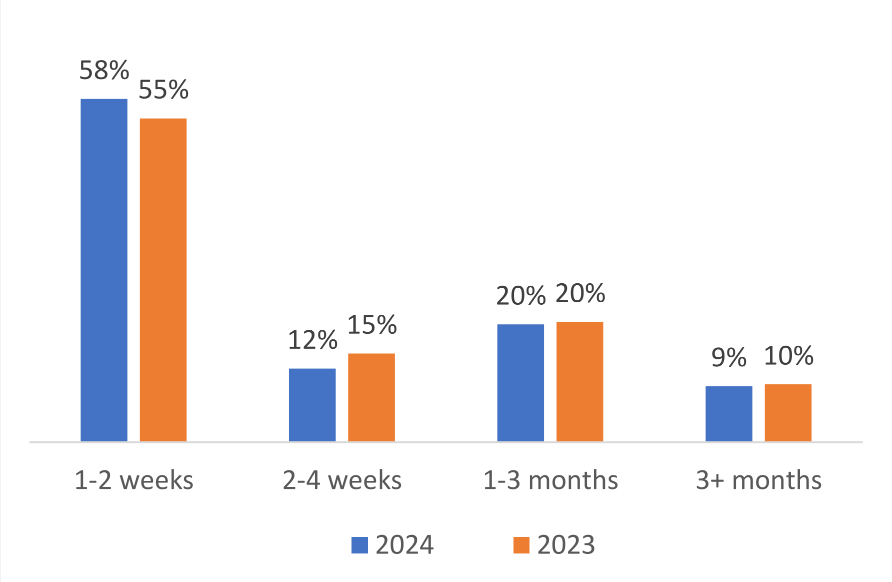
Luxembourg

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 19.8.-15.9.



Hotel searches for all future arrivals, % change vs. 2023

After a gradual slowdown throughout August, **weekly search volumes** for future **hotel stays** in Luxembourg have picked up pace since the start of September, growing by an average +13% in the first half of the month. Recent **bookings** have followed a continuous upward trend throughout August and September (with the exception of one sole week), indicating strong last-minute demand for leisure stays in August. The recent rebound in travel intent helped **hotel searches exceeding last year's levels by no less than 10%,** with stronger search growth in business (+14%) than leisure (+8%). This contrasts with trends observed by respondents to LFT's hotel survey (which is based on actual bookings, see page 12) and thus indicates growth potential for **further new business travel bookings** over the coming weeks and months.

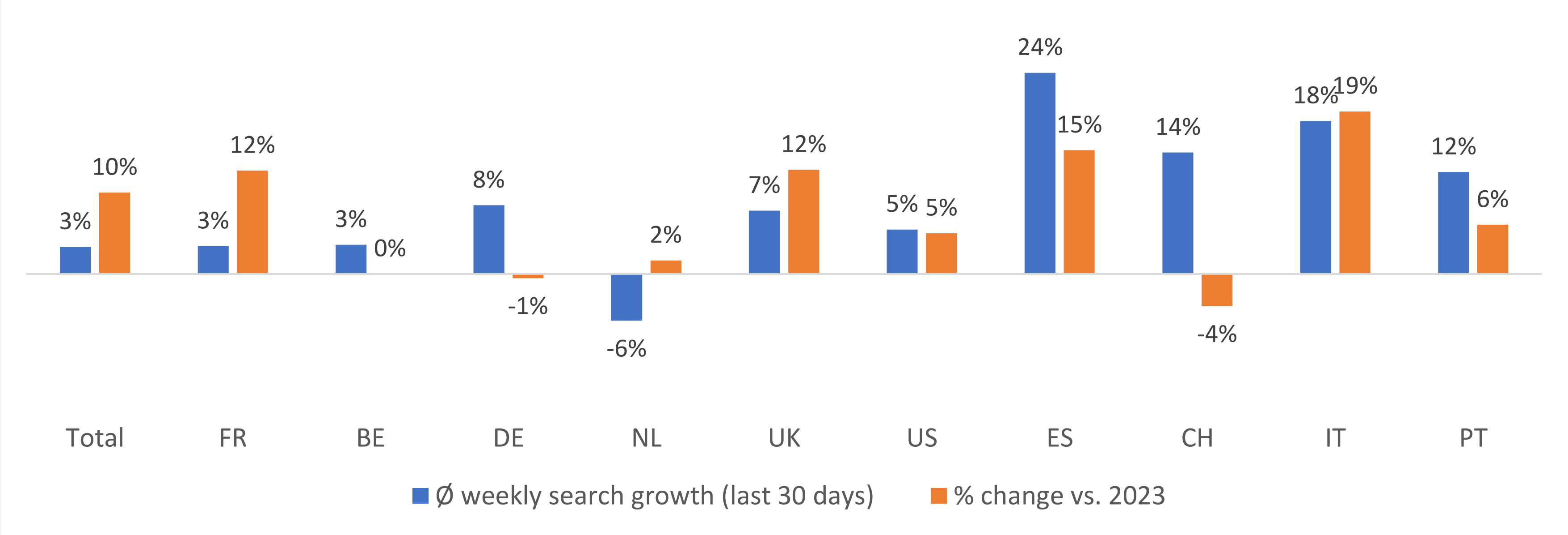
Identified as one of the key challenges impacting Luxembourg's hotels in our recent surveys, the trend of **short-term bookings** appears to linger on: 58% of searches for future hotel stays made during the past 30 days relate to stays only 1-2 weeks ahead, up from 55% last year. Looking longer ahead, demand for November currently remains subdued, while that for December is roughly the same as in 2023 at this time.

Data source : Sojern.

Hotel Searches & Bookings

Luxembourg

Hotel demand for all future arrivals by top 10 source markets, % change week-on-week & vs. 2023



Hotel searches, % market shares by source market

France	20%
Belgium	16%
Germany	15%
Netherlands	14%
United Kingdom	8%
United States	4%
Spain	3%
Switzerland	3%
Italy	2%
Portugal	2%

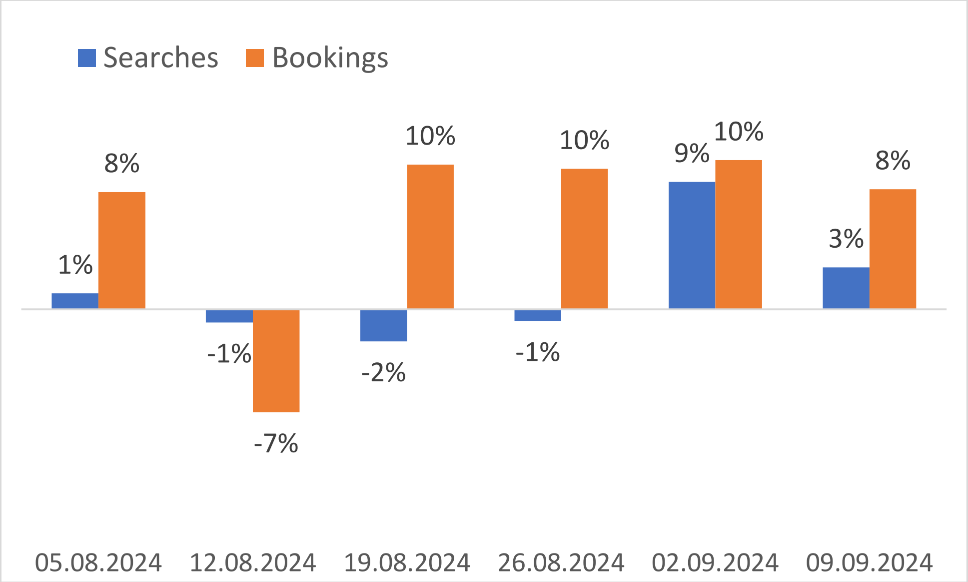
Some **source markets** that have largely driven the **recent weekly growth** of **hotel searches** include Italy, Spain and Germany. Significant growth was also recorded from the UK and Switzerland in September, but this has followed up stronger earlier decline. When **comparing with the previous year**, demand growth for future hotel stays is strongest from France, the UK, the US and Southern European markets. Year-on-year performance from Germany and Switzerland appears subdued, but Germany, and the UK, are among those markets where leisure hotel demand growth continues to outperform business demand growth for the upcoming low season. By contrast, demand growth vs. 2023 from France, Spain and Italy is essentially business-driven.

Cities that have significantly improved their relative share of demand for future hotel stays in Luxembourg compared to last year include Munich, Frankfurt, Madrid, Valencia, Lausanne, Bern, Manchester, Liège, Gent and The Hague.

Data source : Sojern.

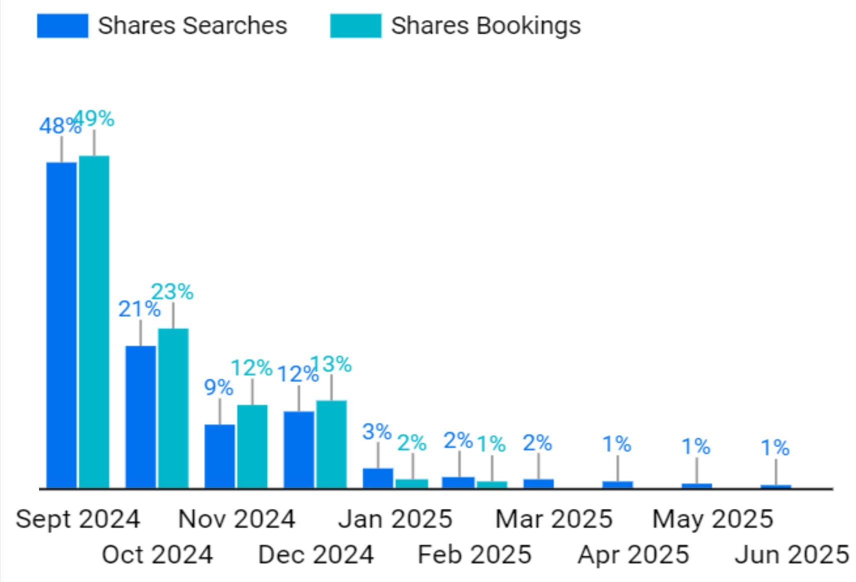
Flight Searches & Bookings
Luxembourg

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 2.-15.9., bookings last 6 months for travel until Feb 25.

Flight bookings for all future arrivals, % change vs. 2023

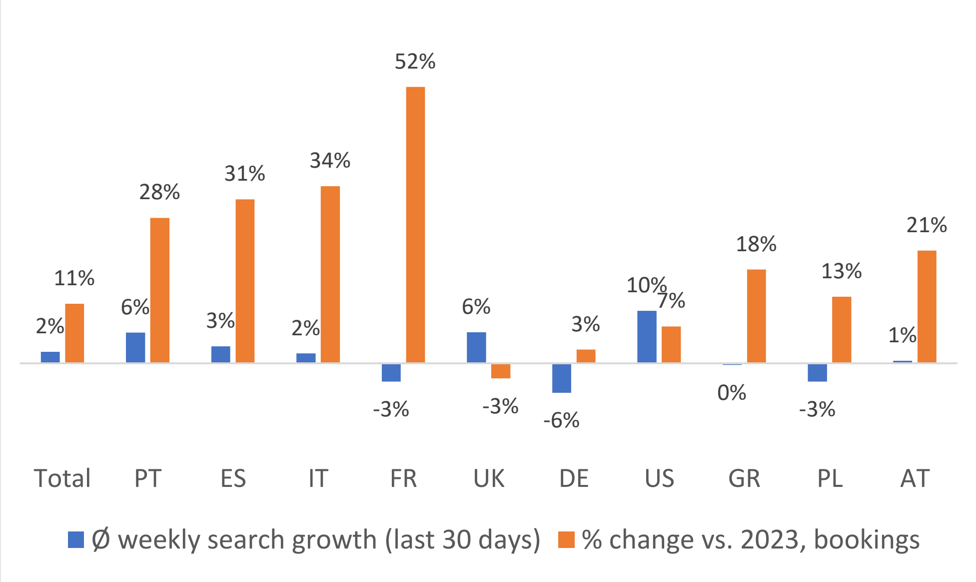
Recent **searches and bookings** for future **flights** to Luxembourg have followed a remarkably similar trend to that observed at the hotel level (i.e., searches picking up from the start of September onwards, bookings increasing more substantially in August and September). Between mid-August and mid-September, flight searches have indeed grown by 2%, and flight bookings even by 10% **week-over-week**. Bookings for future air travel to Luxembourg are now **11% higher than last year**, and are on a par with those recorded in 2019. As opposed to what is seen at the hotel level, **lead times** for air travel have extended, with more searches already having been recorded for stays in early 2025. However, future monthly distribution of bookings, by contrast, is similar to last year. There is a substantial year-on-year **growth** in bookings for the period of **November until February**, most of it being **leisure-driven** (likely Christmas- and/or VFR-related travel). This should also lead to some further hotel leisure bookings in the coming months.

Data source : Forward Keys.

Flight Searches and Capacities

Luxembourg

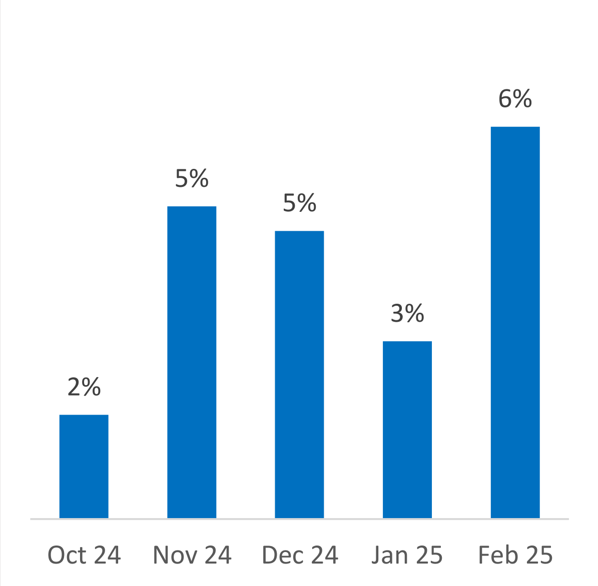
Flight demand for arrivals next 6 months by top source markets, % change searches week-on-week & bookings vs. 2023



Flight searches, % market shares by source market

Portugal	20%
Spain	17%
Italy	12%
France	10%
United Kingdom	10%
Germany	7%
United States	5%
Greece	4%
Poland	3%
Austria	2%

Seat capacities to Luxembourg by arrival months, % change vs. 2023



Flight connectivity to Luxembourg

	Oct 24 – Feb 25	Change year-on-year
Countries connected	33	=
Avg weekly flights	464	+12
Seats	1.194.152	+4%
Airlines	17	-1
Top 5 origins, seats (% year-on-year): PT (+3%), ES (+13%), DE (+2%), UK (+15%), IT (-9%)		

Most **source markets** have shown **recent weekly search growth** for future **flights** to Luxembourg, with the exception of France, Germany and Poland. Air travel intent has notably improved from the US recently, and US bookings are now 7% higher than last year. However, there is also a range of further source markets driving **year-on-year growth** of flight bookings such as France and key Southern European countries (all over +25% vs. 2023). Bookings from Germany are slightly up vs. 2023 but remain below 2019 levels, while the opposite is true for bookings from the UK. A good deal of the leisure-driven growth for trips between November-February originates from Southern Europe, the UK, the Nordics and some long-haul markets such as the US and Brazil. **Origin cities** with high demand growth for future flights to Luxembourg compared to 2023 include Lisbon, Milan, Madrid, Stockholm, Vienna, Sao Paulo, Mexico City and Tokyo (amidst a very slight pickup of Japanese demand but which remains subdued).

Seat capacities for travel until February have increased by 4% over last year (and by 3% vs. 2019). Year-on-year growth is particularly strong for source markets Spain (Madrid/Ryanair), the UK (London/BA & Ryanair), France (Marseille & Toulouse/Ryanair) and the Netherlands (new direct connection with Rotterdam by Luxair from 15 October).

Data source : Forward Keys.

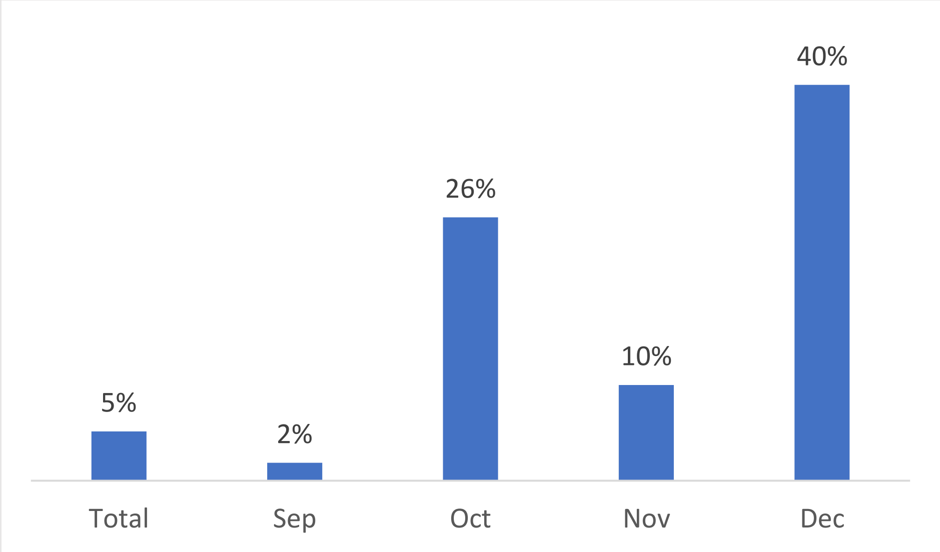
Campsites Bookings

Luxembourg

This time around, our different camping **data sources suggest slightly diverging trends** for the late season: while respondents to the LFT camping survey tend to expect a slight year-on-year decline in occupancy (especially for September), booking figures from our booking engine data provider suggest a stabilisation in September (+2%) and a strong increase in bookings for the following months, although it should be remembered that absolute volumes are typically low in those months. The data provided by this booking engine has been systematically more optimistic than LFT survey and Statec data. Therefore, we will continue to monitor these trends to better assess the reliability and interpretation of this data source. For now, we can see total bookings recorded for stays up to December to be 5% ahead of **last year's levels**. New bookings for all future stays made in the **last 4 weeks** were 1% higher than those recorded one month earlier.

Looking at the main **source markets** for autumn 2024 on campsites, year-on-year growth is strong from Germany (+12%) and the Netherlands (+11%), followed by Belgium (+6%). Demand from the UK is soaring, but absolute volumes are small.

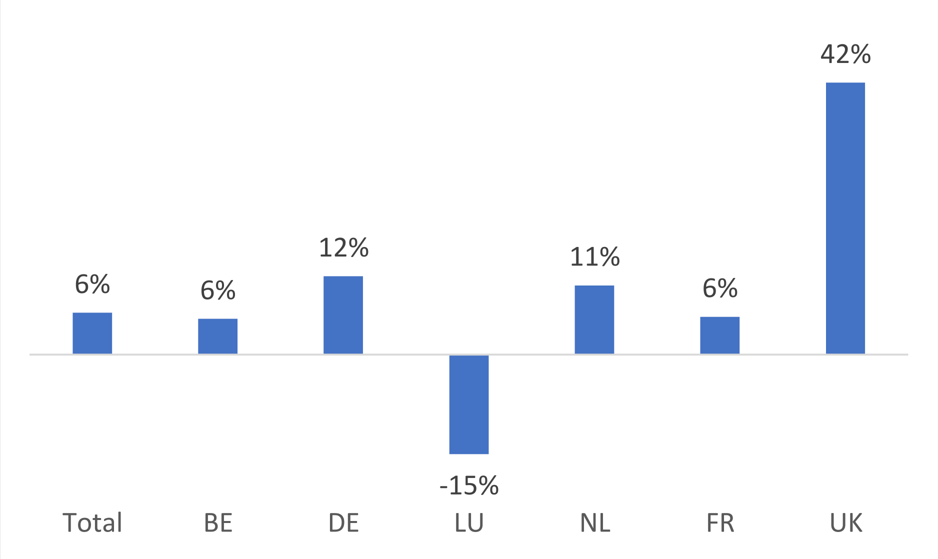
Campsite bookings by month of future arrival, % change vs. 2023 (*)



Campsite bookings for arrivals until December, % change vs. 2023

Campsites bookings made 15.8.-14.9.2024 for future arrivals, % month-on-month change

Campsite bookings for arrivals until December by top source markets, % change vs. 2023 (*)



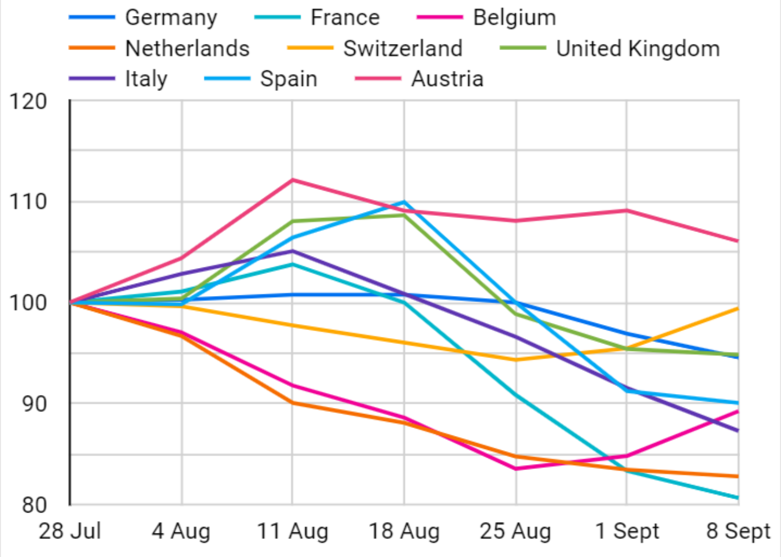
(*) as of 31.08.2024.

Data source : Tommy Booking Support.

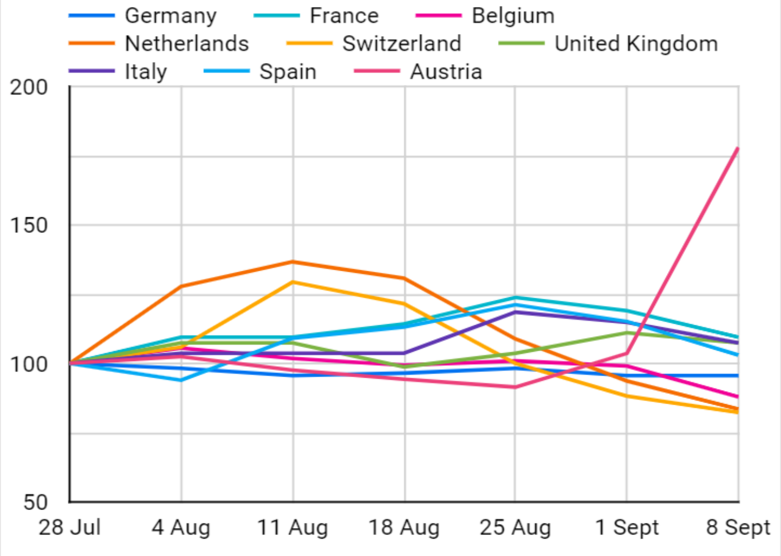
Travel Themes on Google

Evolution of relative search interest on Google in main source markets

ALL travel-related searches (28.7.2024 = index 100)



LUXEMBOURG travel-related searches (28.7.2024 = index 100)



General **travel-related searches on Google** have followed a volatile trend over the **past weeks** depending on source markets, but overall, they have tended to decrease throughout August and into September, a largely seasonal effect. Austrians showed the strongest recent search growth, and a rebound in searches was recorded among Belgian and Swiss users since the beginning of September. **Comparing with 2023**, Google travel searches were recently up among Belgians, Britons, Italians, Spanish and Austrians. Most of these source markets – joined by the Germans and the French – also yielded year-on-year search growth for destination **Luxembourg**. Relative search interest from Austria peaked mid-September due to a well-received prime time TV presence also featuring the Grand Duke.

Recent weekly search volumes for **hiking** on Google have been decreasing gradually (except among Britons and Spanish), but compared to one year ago, search interest is higher from Belgium, the Netherlands, the UK and Italy. Interest for **youth hostels** as reflected by Google searches, peaked among Germans in mid-September, exceeding last year's levels, and also picked up among French and Britons. Relative interest for **holiday home** stays in autumn is improving over last year among Italians, Spanish and Austrians.

Regarding **city-break**-related Google searches, recent patterns vary across source markets but when comparing with last year, interest is up in France, Netherlands and the UK. For **Luxembourg**, recent city trip search trends have been more positive in a larger number of markets, and growth over 2023 is recorded among Dutch, Swiss, Austrian, Italian and Spanish users.

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

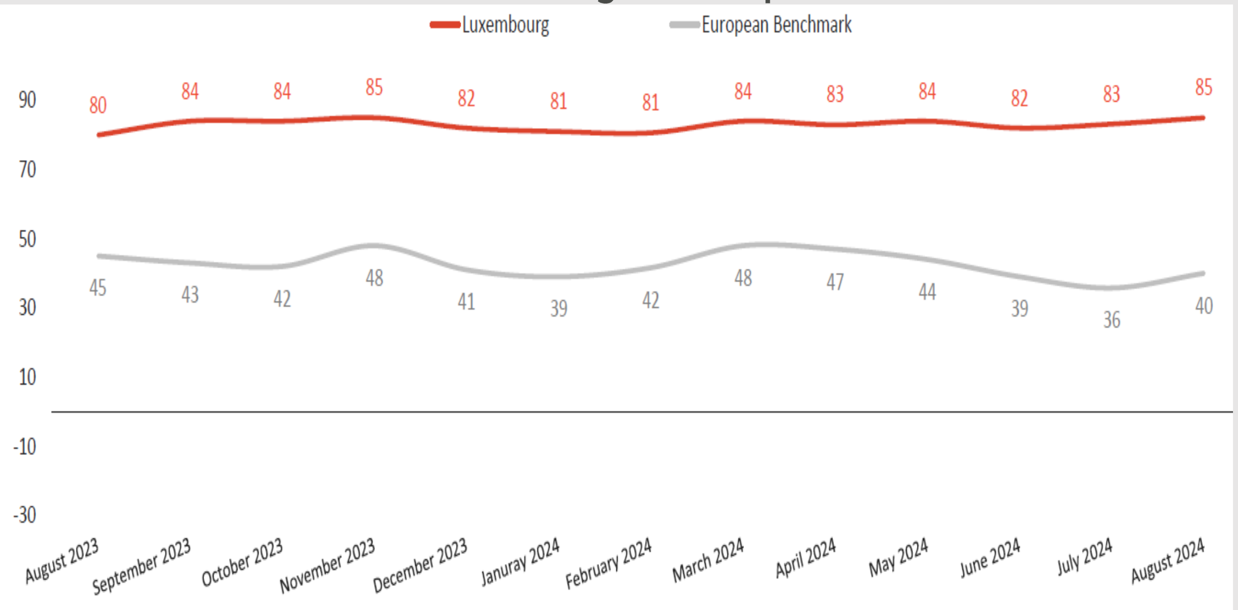
E-Reputation

E-Reputation Luxembourg
Conversations on Social Media

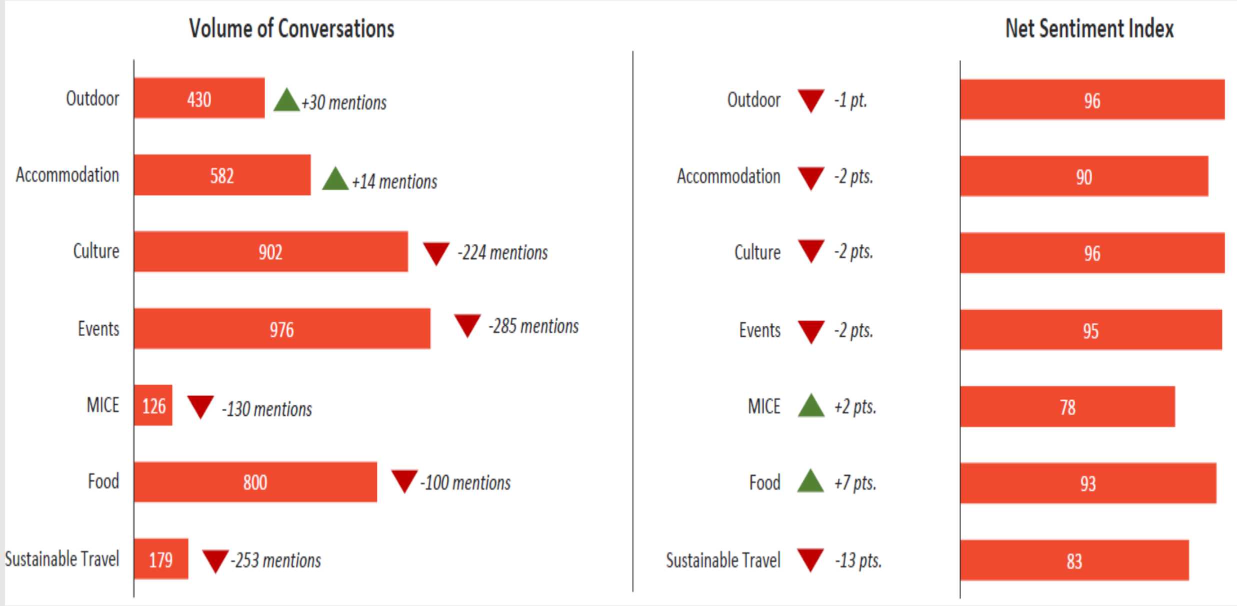
In August, Luxembourg's **Net Sentiment Index**, which measures the polarity of travel-related online conversations, reaches its highest level since November (see left chart). At +85/100, it continues to largely outperform the European benchmark (+40/100), although the latter also improved in August. As a reminder, the Net Sentiment Index varies between -100 for only negative comments and +100 for only positive comments. Thus, Luxembourg generates mostly **positive online mentions in a travel context**, highlighting its brand strength across key source markets. French and Italian users, in particular, have contributed to the further rise in Luxembourg's e-reputation in August, while sentiment declined most among British users. More conversations in August than last year revolved around **food & wine and accommodation**, while outdoor activities generated less volume.

All key travel themes generated largely **positive contributions** to the overall sentiment (i.e., mostly >+90/100, see right chart). More specifically, water activities, motorbike routes, hiking, luxury shopping, classical music events, typical local restaurants and the announcement of Pope Francis' visit to Luxembourg in September were some more niche topics that yielded particularly positive online mentions. The few more negative stories related to flight cancellations and delays.

Net Sentiment Index of Luxembourg and Europe



Volume of mentions and Net Sentiment Index of Luxembourg by main topics, August 2024 (vs. July 2024)



Source: Travelsat Luxembourg Reputation Tracker

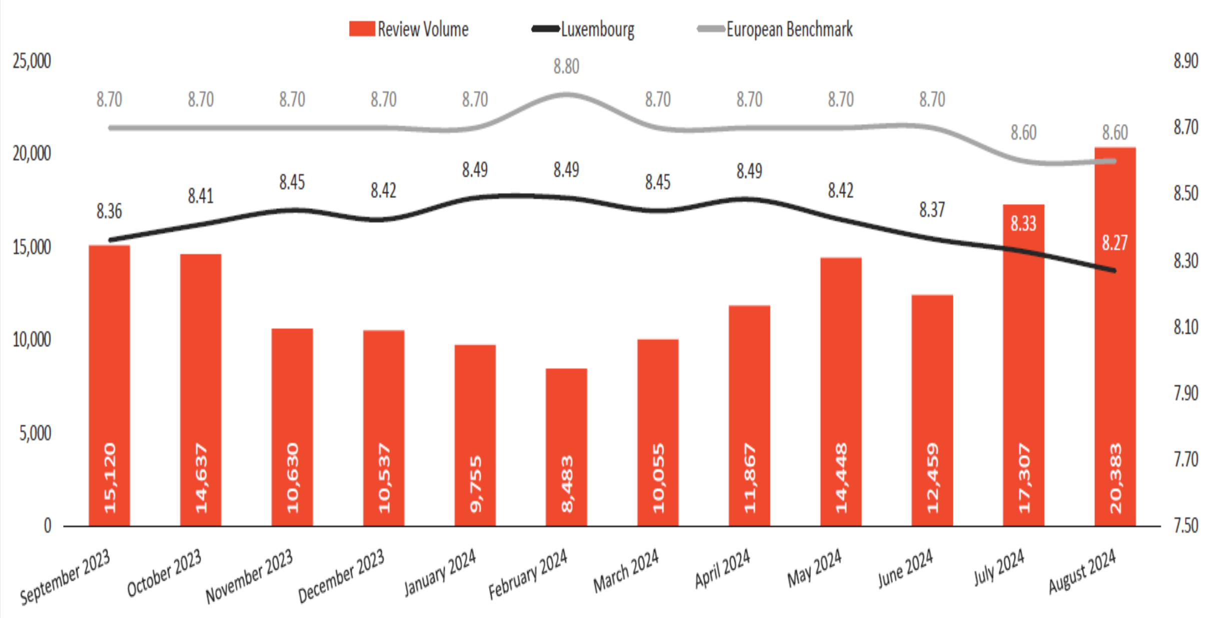
E-Reputation Luxembourg

Visitor Experience

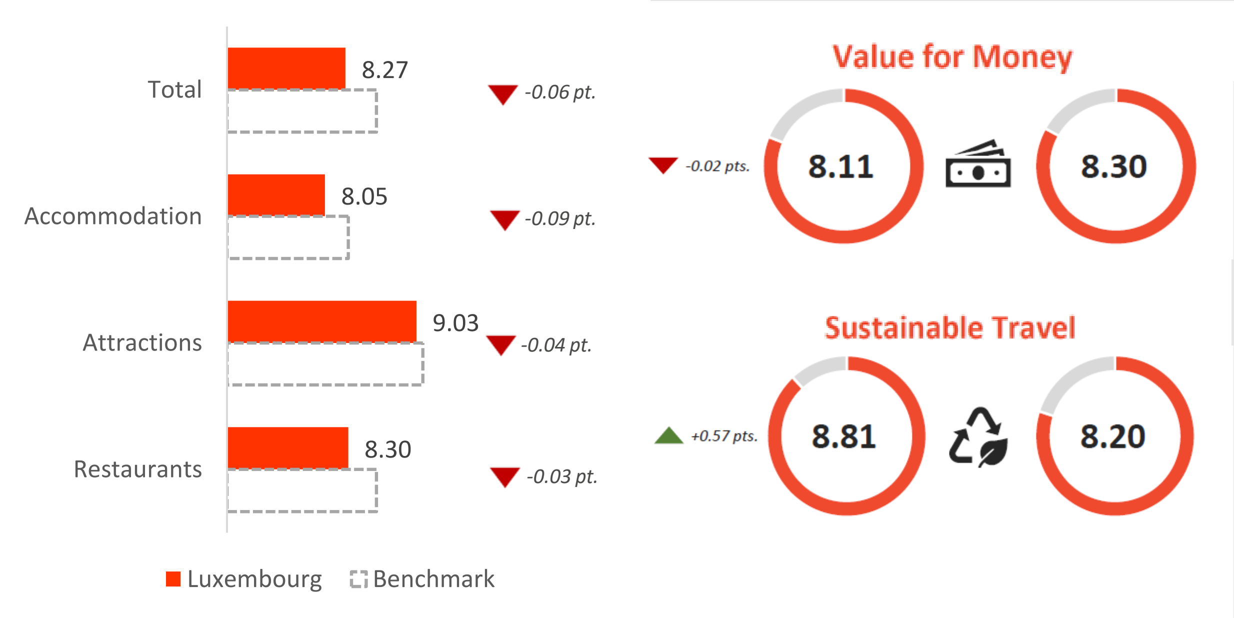
Monthly **volume** of **online reviews** on rating platforms (Trip Advisor, Google, Booking etc.) peaked in August, which is a normal seasonal pattern. Likewise, as in previous years and across other European destinations, **satisfaction scores** were lowest in August, a consequence of higher tourism pressure on sites and accommodations and weaker visitor experience as a result. The decline since April in visitor satisfaction in Luxembourg was a bit stronger than for the European benchmark, and was also stronger than last year. Weaker ratings for **restaurants** were a driver for this trend, as were **culture and museums** – but in general, attractions retained very high satisfaction scores near the European benchmark, with **hiking, cycling, mountainbiking** (which improved vs. July) topping the list, followed by nature, parks and gardens. **Accommodation ratings** in Luxembourg remained equal to last year for hotels and campsites, while satisfaction scores dropped for youth hostels and improved for holiday homes.

In August, Luxembourg's **value for money** perception remained nearly unchanged compared to July and to 2023 but, as such, narrowed the European benchmark which dropped for both comparison periods. By contrast, **sustainability** perception of Luxembourg's offer reached a new peak in August, now far ahead the European benchmark thanks to a very strong improvement in the accommodation sector.

Volume of reviews and avg. rating on online platforms



Average ratings, August 2024 (vs. July 2024)



Source: Travelsat Luxembourg Reputation Tracker

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