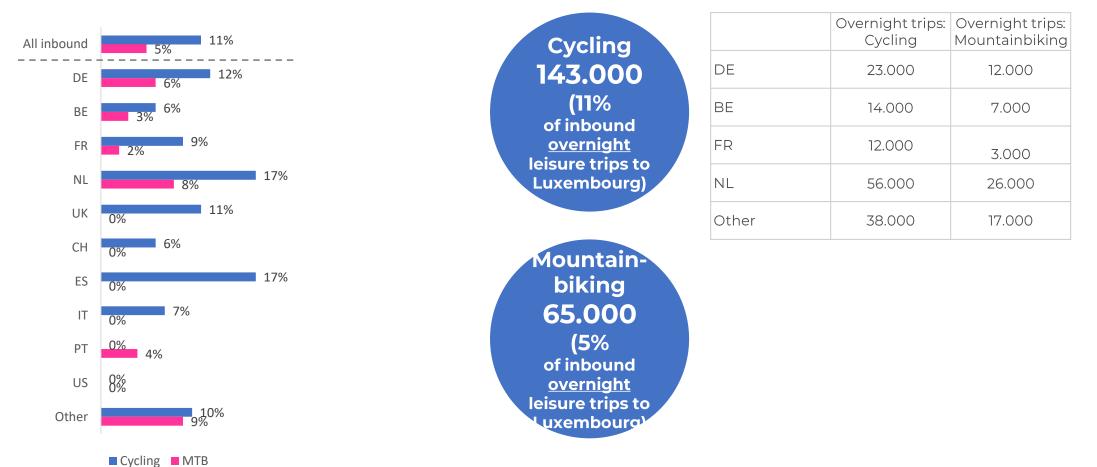
Luxembourg for Tourism Theme profile CLINE YOUNTAINBIKING 2023

Market size of Cycling & Mountainbiking holiday segments

Volume of leisure visitors with Cycling & Mountainbiking as an activity during holidays Overnight trips

Share of visitors with Cycling & Mountainbiking as an activity, by source markets

Number of overnight trips to Luxembourg (estimate 2023)

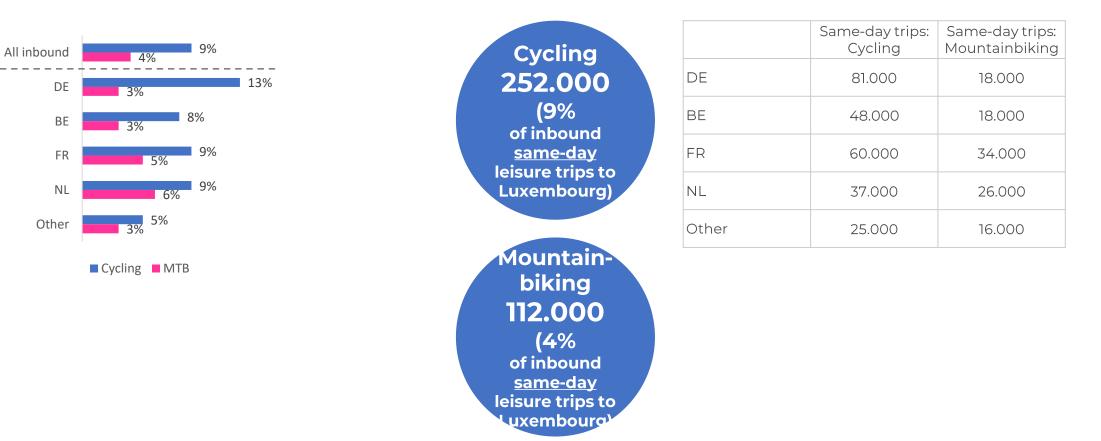


Sources: LFT/Ilres Visitor Survey, 2020-2023; trip volumes are estimates based on World Travel Monitor/IPK International & Editus/LFT mobile phone data).

Volume of leisure visitors with Cycling & Mountainbiking as an activity during excursions Same-day trips

Share of visitors with Cycling & Mountainbiking as an activity, by source markets

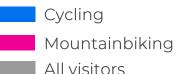
Number of excursions to Luxembourg (estimate 2023)



Sources: LFT/IIres Visitor Survey, 2020-2023; trip volumes are estimates based on Editus/LFT mobile phone data).

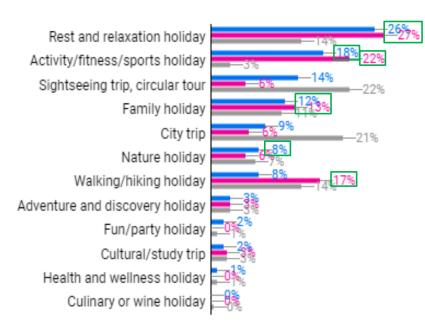
Travel behaviour of leisure visitors with Cycling & Mountainbiking holiday activity in Luxembourg

Holiday types Inbound leisure visitors with overnight, 2020-2023



Significantly higher than average

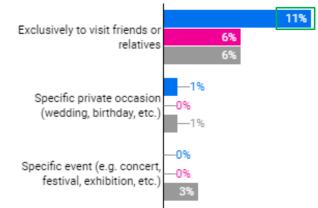
Main holiday types



Additional holiday types



Main purpose of overnight trip (if not holiday)

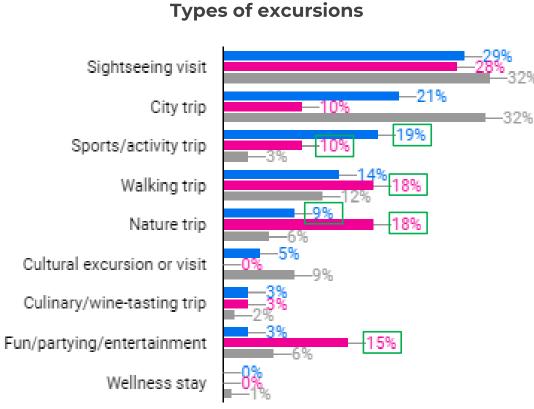


Types of excursions Inbound leisure same-day visitors, 2020-2023

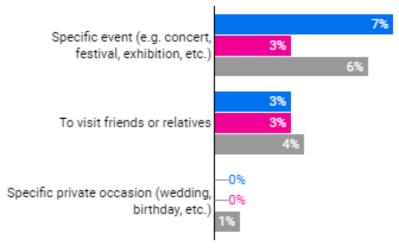
Significantly higher than average

Mountainbiking All visitors

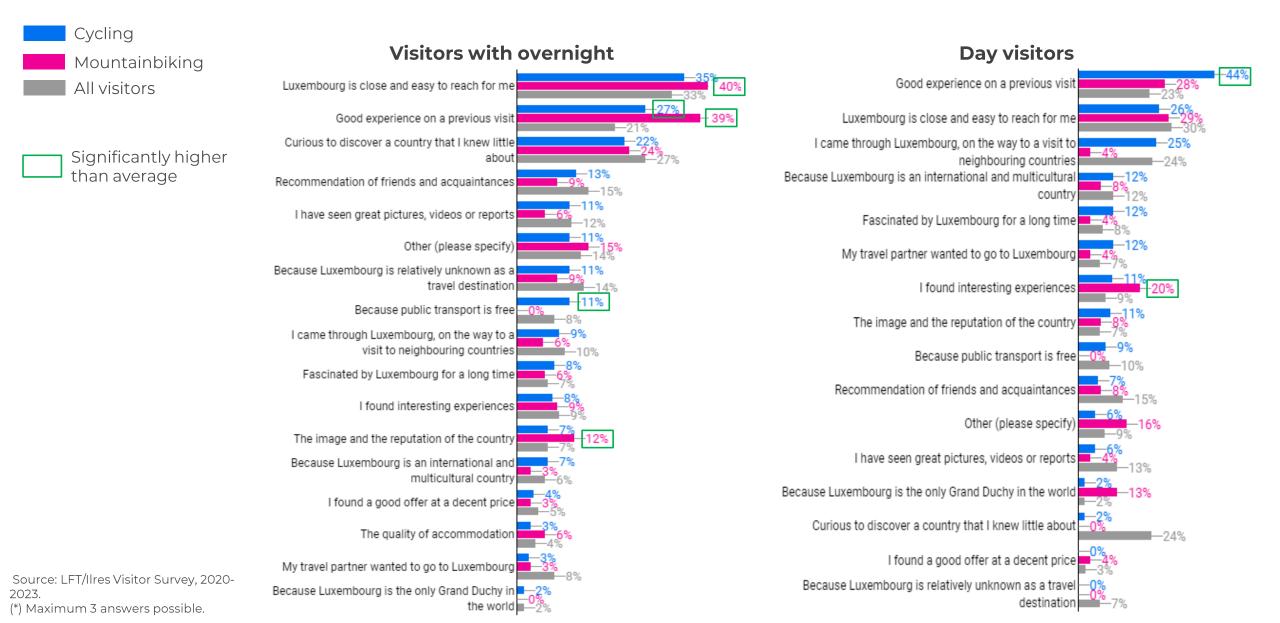
Cycling



Main purpose of same-day trip (if not excursion)

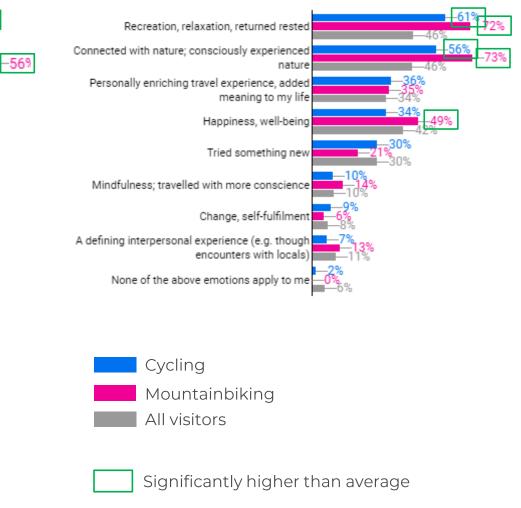


Key decision criteria for choosing Luxembourg (*) Inbound leisure visitors, 2020-2023



Key travel motives and emotions Inbound leisure visitors with overnight, 2020-2023

Emotions experienced during stay

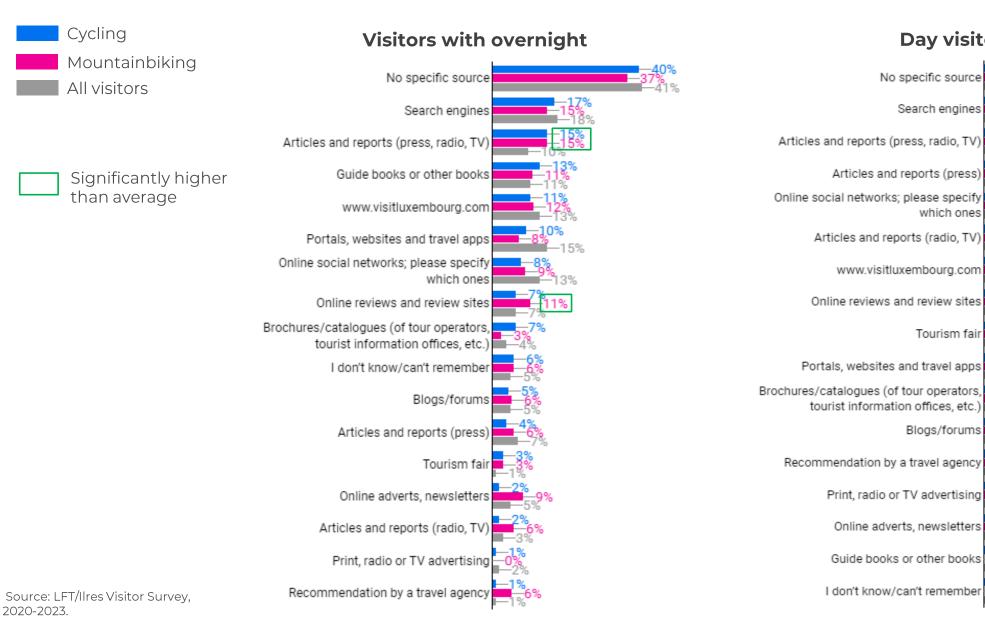


Source: LFT/Ilres Visitor Survey, 2020-2023.

Travel motives



Inspiration sources Inbound leisure visitors, 2020-2023



Day visitors

No specific source

Search engines

which ones

Tourism fai

Blogs/forums

36%

4%

28%

Type of accommodation, destination regions Inbound leisure visitors with overnight, 2020-2023 Cycling Mountainbiking All visitors **Destination region** Type of accommodation 38% Hotel, guest house, bed and breakfast Luxembourg-ville -16% 56% +25% 34% Campsite: own tent or caravan Nord Staying with friends or relatives Est Motorhome, camper van Centre Campsite: rented hut/lodge or self-catering accommodation Other (please specify) Suc Youth hostel, other hostel, group accommodation, summer camp Significantly higher Holiday apartment or house than average Farm Own secondary proper

Target segments Inbound leisure visitors, 2020-2023

Significantly higher

Visitors with overnight

than average

EXP – Explorers NLA – Nature-Loving Actives RS – Relaxation Seekers SB – Short Breakers PS – Perfection Seekers

LO – Leisure Oriented

3%

EXP

NLA

RS

SB

PS

LO

10%

10%

11%

7%

7%

7%

8%

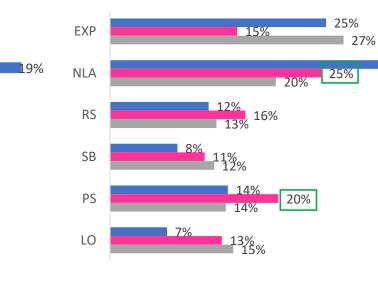
■ Cycling ■ MTB

5%

5% 5%

Reading example: 10% of Explorers have

cycling as a holiday activity



■ Cycling ■ MTB ■ All visitors

34%

Reading example: 25% of visitors with cycling as a holiday activity are Explorers





Cycling MTB

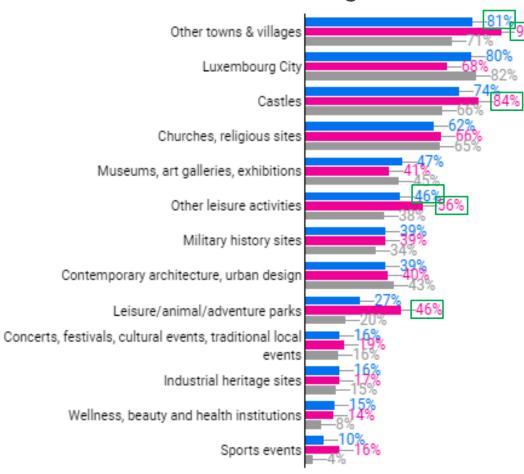
Source: LFT/Ilres Visitor Survey, 2020-2023.



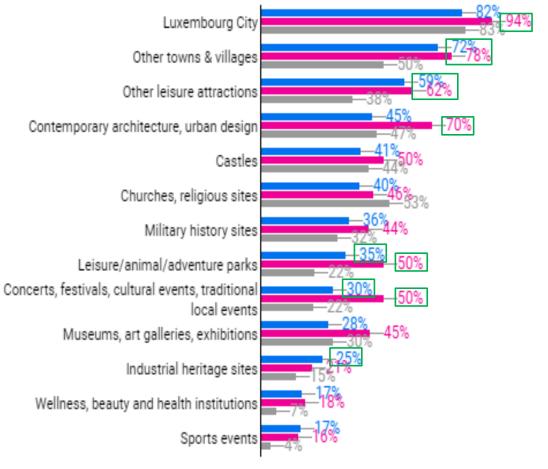
Places visited during leisure stays Inbound leisure visitors, 2020-2023

Cycling Mountainbiking All visitors





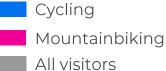
Significantly higher than average



Day visitors

Source: LFT/Ilres Visitor Survey, 2020-2023.

Non-sporting activities undertaken during leisure stays Inbound leisure visitors, 2020-2023



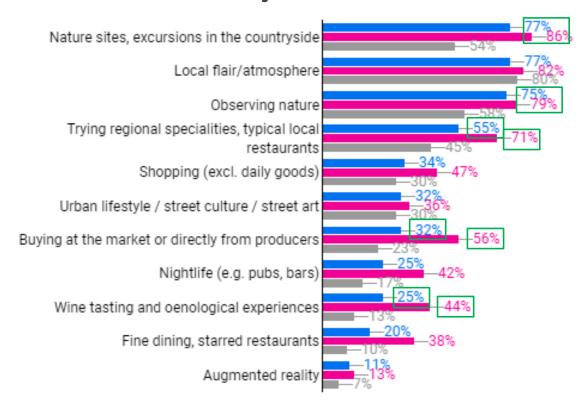
Significantly higher than average

Visitors with overnight



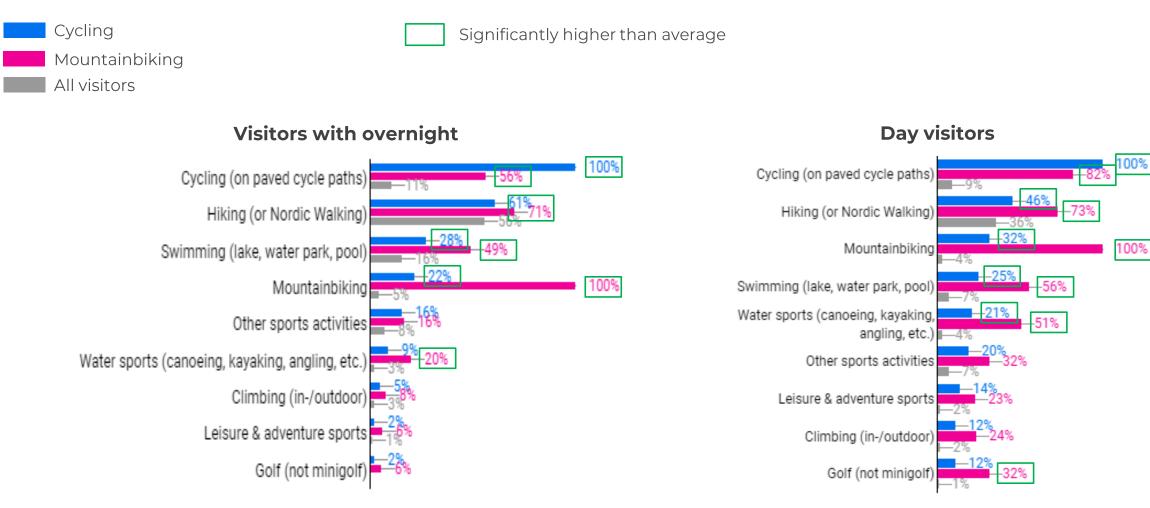


Day visitors



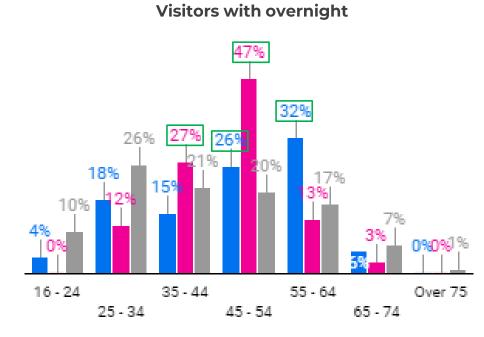
Sporting activities undertaken during leisure stays Inbound leisure visitors, 2020-2023

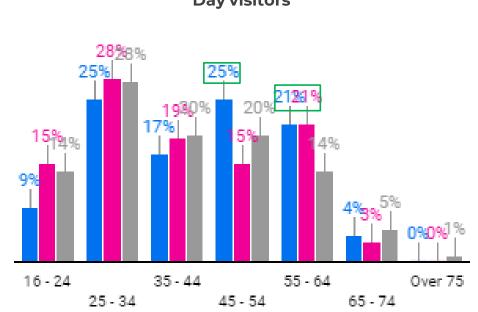
00%



Age groups Inbound leisure visitors, 2020-2023







Day visitors



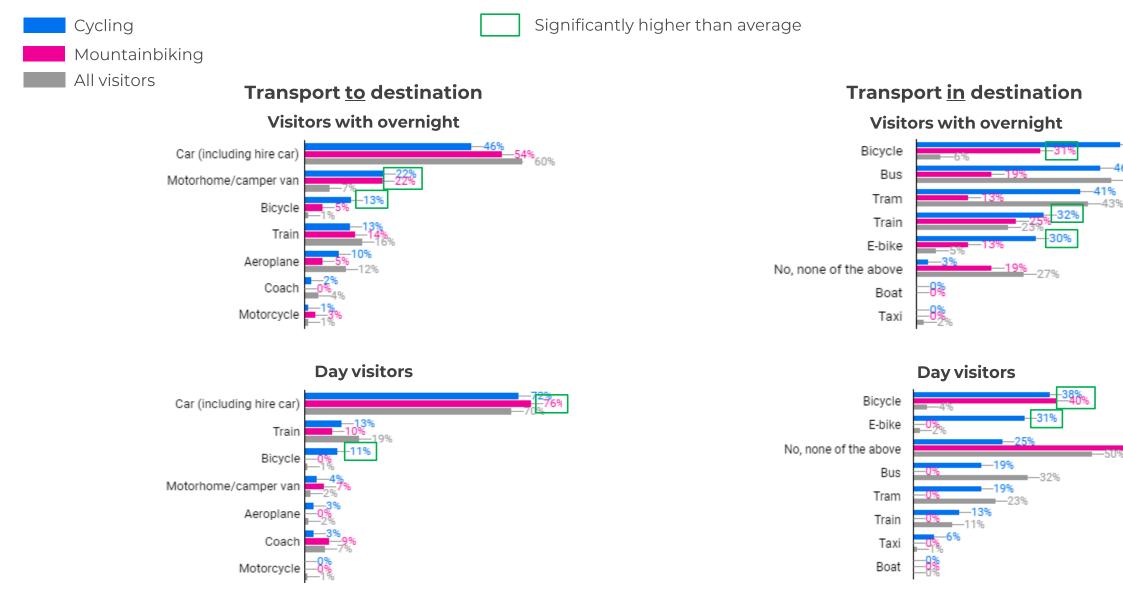
Significantly higher than average

Transport (to and in destination) Inbound leisure visitors, 2020-2023

-51%

49%

60%



Source: LFT/Ilres Visitor Survey, 2020-2023.

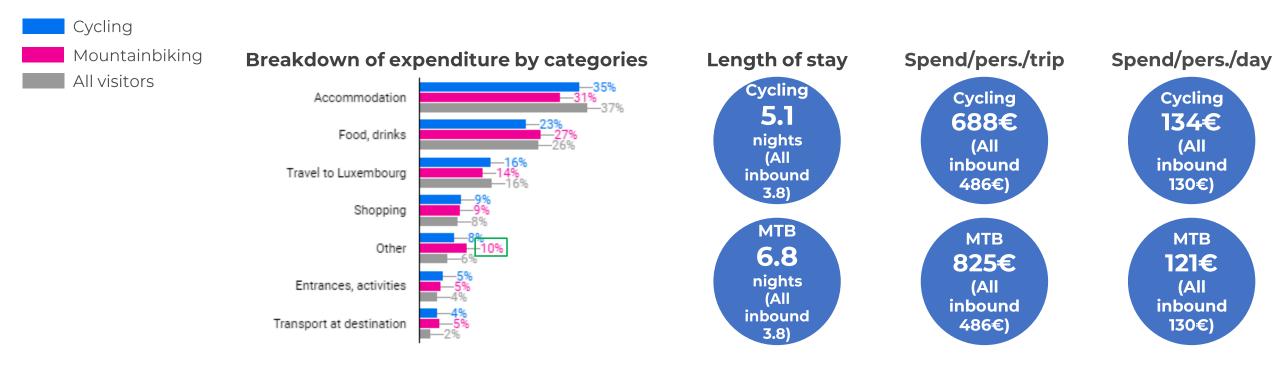
Travel party, repeat visits and cross-border trips Inbound leisure visitors with overnight, 2020-2023 Cycling Mountainbiking All visitors Visitors spending nights in Luxembourg and abroad during same trip **First-time visitors Travel party** Significantly higher than Cycling Cycling My spouse or partner average 46% **57%** Friends, acquaintances or extended family (All (All Children under 16 inbound inbound 61%) 36%) I travelled alone Work/team colleagues or professional contacts **MTB MTB** A travel group 37% 50% (All (All inbound inbound

61%)

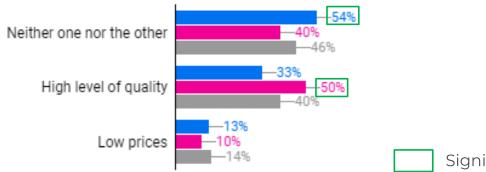
36%)



Expenditure, length of stay and quality vs price orientation Inbound leisure visitors with overnight, 2020-2023



Quality vs. price orientation



Significantly higher than average

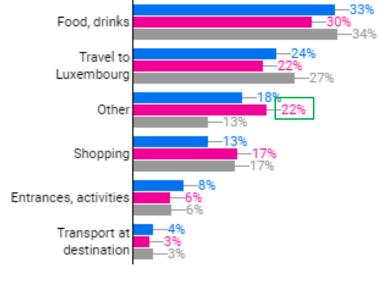
Source: LFT/Ilres Visitor Survey, 2020-2023.

Expenditure Inbound leisure same-day visitors, 2020-2023



All visitors

Breakdown of expenditure by categories

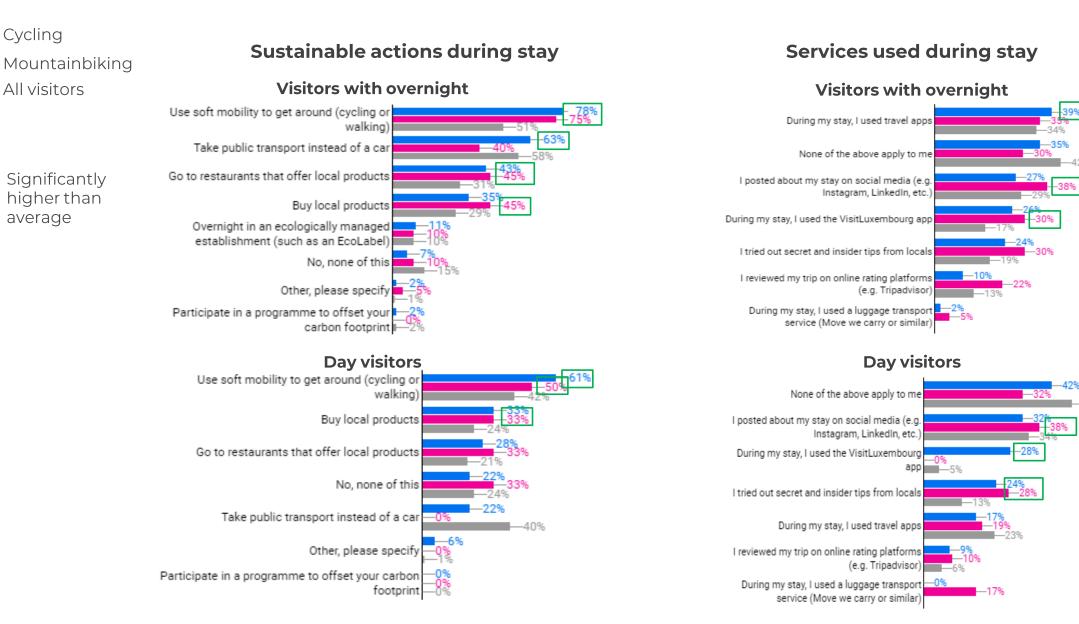


Significantly higher than average

Spend/pers./day trip



Actions during stay (sustainable and services) Inbound leisure visitors, 2020-2023



Source: LFT/Ilres

Visitor Survey, 2020-2023.

Visitor satisfaction and recommendation Inbound leisure visitors with overnight, 2020-2023

All visitors		Tend t	Ily agree o disa Ily disagr	N	fend to a ot sure/	-
Would recommend Luxembourg as a travel destination				65%	1	32%
Luxembourg will stay in my memory for a long time				65%		34%
Luxembourg excited me as a travel destination				66%		32%
Luxembourg exceeded my expectations			44%		469	%
Can see myself coming back to visit Luxembourg				63%	279	%
Can see myself coming back to Luxembourg for a longer stay			42%	299	6 19	% -
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period			42%		38%	10
09	%	20%	40%	60%	80%	1009

Cycling		Tend t	gly agre to disa gly disa			Tend to lot sure,	2
Would recommend Luxembourg as a travel destination				6	7%		31%
Luxembourg will stay in my memory for a long time				6	5%		34%
Luxembourg excited me as a travel destination				61%	5		37%
Luxembourg exceeded my expectations			48	%		4	5%
Can see myself coming back to visit Luxembourg				64	%	3	31%
Can see myself coming back to Luxembourg for a longer stay			42%			42%	13%
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period		25%		31%		25%	19%
C	96	20%	409	66	0%	80%	100

Mountainbiking

Would recommend Luxembourg as a travel destination			76%	22%
Luxembourg will stay in my memory for a long time			70%	31%
Luxembourg excited me as a travel destination			75%	25%
Luxembourg exceeded my expectations			61%	34%
Can see myself coming back to visit Luxembourg			69%	31%
Can see myself coming back to Luxembourg for a longer stay	17%			83%
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period		42%		50%

Visitor satisfaction and recommendation Inbound leisure same-day visitors, 2020-2023

All inbound		Strongly Tend to d Strongly	lis	N	lend to a ot sure/[-
Would recommend Luxembourg as a destination for an excursion				70%	26	%
Luxembourg will stay in my memory for a long time				64%	33	% - 1
Luxembourg excited me as a destination for an excursion				71%	27	7% -
Luxembourg exceeded my expectations		37%			52%	- 85
Can see myself coming back to visit Luxembourg				71%	23%	4
Can see myself coming back to Luxembourg for a longer stay		43	3%	3	6% 14%	- 5
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period			52%		33%	-7 4
0	%	20%	40%	60%	80%	100%

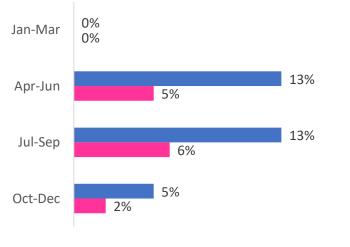
Cycling	Strongly agr Tend to dis Strongly disa	Not	nd to agr sure/D
Would recommend Luxembourg as a destination for an excursion		74%	27%
Luxembourg will stay in my memory for a long time		65%	35%
Luxembourg excited me as a destination for an excursion		77%	21%
Luxembourg exceeded my expectations	46%		49%
Can see myself coming back to visit Luxembourg		75%	24%
Can see myself coming back to Luxembourg for a longer stay	509	6	44%
Can imagine coming back to Luxembourg during low season, i.e. outside the summer period	50%	6	38% <mark>13%</mark>
0%	20% 40%	60%	80% 100

Mountainbiking

65% 32%		Would recommend Luxembourg as a destination for an excursion
47% 53		Luxembourg will stay in my memory for a long time
68% 32		Luxembourg excited me as a destination for an excursion
35% 53%	35%	Luxembourg exceeded my expectations
76% 21%		Can see myself coming back to visit Luxembourg
50% 33% 17		Can see myself coming back to Luxembourg for a longer stay
50% 50		Can imagine coming back to Luxembourg during low season, i.e. outside the summer period

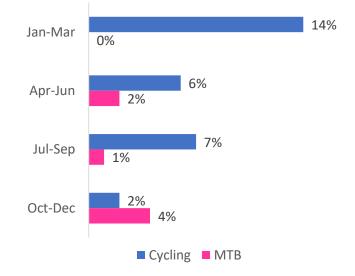
Trip seasonality Inbound leisure visitors, 2020-2023

Visitors with overnight



Cycling MTB

Day visitors



Destination Awareness & Growth Potential for Cycling & Mountainbiking segments

General theme interest – Cycling

	Rank (*)	Total themes in survey	% "very interested"	% "interested"	% "interested", Ø all themes	"Interested", population, mn (**)
Average Europe	31	33	-	37 %	54%	-
	26	33	23%	44%	52%	26,5
	23	33	23%	47 %	53%	5,9
	29	33	18%	43 %	54%	2,8
	26	33	19%	43 %	53%	2,8
	25	33	19%	41 %	51%	3,3
	29	33	18%	43 %	55%	20,2
	31	33	12%	28%	53%	13,5
	18	20	9%	30%	40%	12,8
	18	20	11%	29 %	44%	10,0
	17	21	22%	44%	47%	12,3
	22	24	17%	35%	54%	1,2
	22	24	12%	33%	51%	1,4
	22	24	11%	35%	52%	2,5
œ	23	24	30%	30%	60%	2,3

(*) Rank among all surveyed themes in respective source market. Based on % "interested" in theme. (**) Aged 18-74.

Sources: LFT Brand & Potential Studies, except IT-ES-PL: Destination Brand/Inspektour.

General theme interest – Mountainbiking

	Rank (*)	Total themes in survey	% "very interested"	% "interested"	% "interested", Ø all themes	"Interested", population, mn (**)
Average Europe	32	33	-	29 %	54%	-
	32	33	16%	29 %	52%	17,7
	32	33	19%	35%	53%	4,4
	32	33	15%	35%	54%	2,3
	32	33	16%	32 %	53%	2,1
	32	33	11%	25%	51%	2,1
	32	33	14%	33%	55%	15,7
	32	33	11%	24%	53%	11,5
	19	20	5%	19%	40%	8,1
	19	20	9%	25%	44%	8,6
	18	21	-	34%	47%	9,5
	23	24	14%	26%	54%	0,9
	23	24	14%	30%	51%	1,2
	24	24	11%	27 %	52%	1,9
Ø	22	24	13%	33%	60%	2,5

(*) Rank among all surveyed themes in respective source market. Based on % "interested" in theme. (**) Aged 18-74.

Sources: LFT Brand & Potential Studies, except IT-ES-PL: Destination Brand/Inspektour.

Luxembourg's perceived theme competence – Cycling

	Rank (*)	Total themes in survey	% "very suitable"	% "very suitable", Ø all themes	"very suitable", population, mn (**)	
Average Europe	20	26	18%	24%	-	
	15	26	20%	23%	11,8	
•	11	26	26 %	26%	3,3	
	24	26	16%	22%	1,0	
	18	26	18%	23%	1,2	
	9	26	24%	25%	2,0	
	16	26	18%	22%	8,4	
	25	26	13%	22%	6,1	
	8	15	20%	21%	8,5	
	8	15	24%	25%	8,3	Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.
	9	10	18%	27%	5,0	(*) Rank among all surveyed themes in respective source market.
	17	20	18%	27%	0,6	Based on % "suitable" for theme. (**) Aged 18-74.
	19	20	17 %	24%	0,7	n.b. : Further information on theme interest and
	19	20	12 %	21%	0,8	Luxembourg's theme competence, e.g. for past visitors and new potential visitors can be found in LFT's Brand & Potential Study report.
	20	20	12 %	33%	0,9	Potential Study report.

Sources: LFT Brand & Potential Studies, except IT-ES-PL: Destination Brand/Inspektour.

Luxembourg's perceived theme competence – Mountainbiking

	Rank (*)	Total themes in survey	% "very suitable"	% "very suitable", Ø all themes	"very suitable", population, mn (**)	
Average Europe	25	26	15%	24%	-	
	26	26	13%	23%	7,7	
•	10	26	28 %	26%	3,5	
	26	26	13%	22%	0,9	
	26	26	10%	23%	0,7	
	15	26	23%	25%	1,9	
	26	26	13%	22%	6,1	
	26	26	11%	22%	5,3	
	15	15	12%	21%	5,1	
	14	15	17 %	25%	5,9	Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.
	20	20	14%	27%	0,5	(*) Rank among all surveyed themes in respective source market. Based on % "suitable" for theme.
	20	20	16%	24%	0,7	(**) Aged 18-74.
	20	20	11%	21%	0,8	n.b. : Further information on theme interest and
(B)	19	20	14%	33%	1,1	Luxembourg's theme competence, e.g. for past visitors and new potential visitors can be found in LFT's Brand & Potential Study report.

Sources: LFT Brand & Potential Studies, except IT-ES-PL: Destination Brand/Inspektour.

General theme interest vs. Luxembourg's theme competence – Cycling (Ø DE-NL-CH-AT-BE-FR-UK) LFT target segments

"Interested", Total themes in **"Very suitable",** Total themes in Rank Rank survey survey 25 **EXP** 26 20 26 NLA 16 26 14 26 25 26 RS 19 26 SB 25 26 22 26 PS 26 26 25 26 LO 25 26 21 26

General theme interest vs. Luxembourg's theme competence

- Mountainbiking (Ø DE-NL-CH-AT-BE-FR-UK)

LFT target segments

	"Interested", Rank	Total themes in survey	"Very suitable", Rank	Total themes in survey
EXP	26	26	26	26
NLA	23	26	20	26
RS	26	26	25	26
SB	26	26	23	26
PS	25	26	26	26
LO	26	26	23	26

Trip organisation and preferences (1) (*)

- Average European source markets, total vs. travellers interested in cycling

Cycling Total Cycling Total 70% 65% Recommendation from family, friends, acquaintances 40% Instagram 44% 56% Youtube 65% 42% 39% Online search engine Facebook 52% 63% 35% 34% Social Media TikTok 51% 51% 35% 35% Online booking engines, travel portals, holiday review sites 30% 34% Pinterest 32% 35% Destination or accommodation websites 19% Snapchat 27% 24% Travel agency 27% 1% 1% Other Features on TV, radio or cinema 28% 22% Guide books or other books 21% 26% Features in newspapers, magazines 18% 24% Advertisements 16% 21% Films and serials (cinema, Netflix etc.) 21% 15% Travel fairs 10% 16% Artificial intelligence (e.g., ChatGPT) 8% 16%

2%

3%

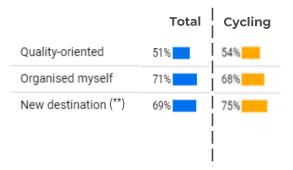
None of the above / no sources

Preferred sources of travel inspiration

Travel party

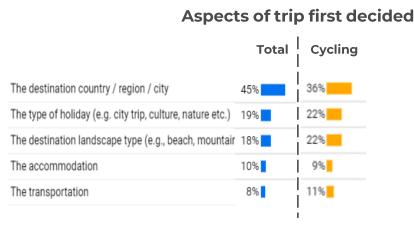
	Total	Cycling
With my partner, spouse	38%	38%
With my family	35%	35%
With friends	15%	15%
By myself	10%	9%
With an organised group	2%	2%

Quality orientation, self-organisation, new destination

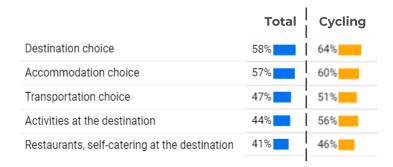


(*) During last outbound holiday trip . (**) Travelled to a destination never visited before.

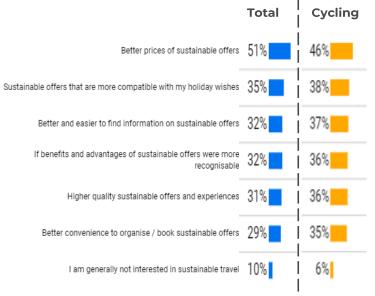
Trip organisation and preferences (2) (*) — Average European source markets, total vs. travellers interested in cycling



Importance of sustainability for choice of trip components



Aspects that could convince travellers to pay more attention to sustainability at future travellings



General preference for visiting iconic vs. lesser-known sites

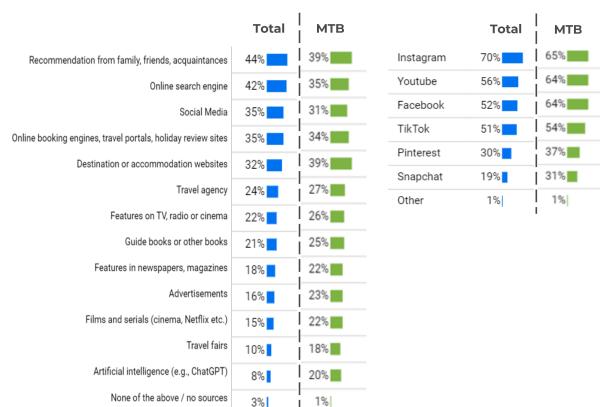


Source: LFT Brand & Potential Studies.

(*) During last outbound holiday trip.

Trip organisation and preferences (1) (*)

— Average European source markets, total vs. travellers interested in mountainbiking

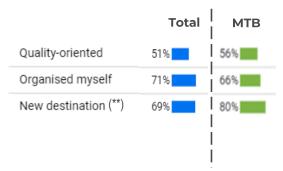


Preferred sources of travel inspiration

Travel party

	Total	 МТВ
With my partner, spouse	38%	32%
With my family	35%	37%
With friends	15%	19%
By myself	10%	9%
With an organised group	2%	3%

Quality orientation, self-organisation, new destination

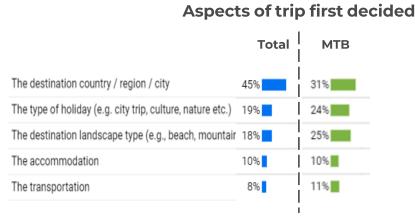


(*) During last outbound holiday trip . (**) Travelled to a destination never visited before.

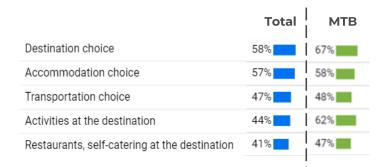
Source: LFT Brand & Potential Studies.

Trip organisation and preferences (2) (*)

— Average European source markets, total vs. travellers interested in mountainbiking



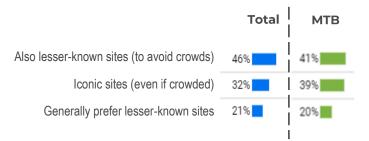
Importance of sustainability for choice of trip components



Aspects that could convince travellers to pay more attention to sustainability at future travellings



General preference for visiting iconic vs. lesser-known sites



Source: LFT Brand & Potential Studies.

(*) During last outbound holiday trip.

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Your contact



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