



Luxembourg for Tourism

Theme profile

CYCLING & MOUNTAINBIKING

2023



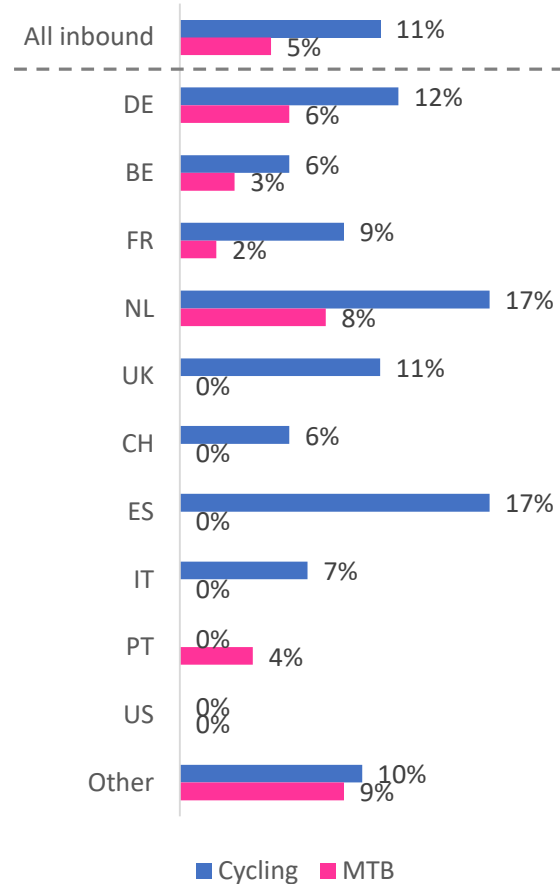
# **Market size of Cycling & Mountainbiking holiday segments**

# 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)

**Cycling**  
**143.000**  
(11% of inbound overnight leisure trips to Luxembourg)

**Mountainbiking**  
**65.000**  
(5% of inbound overnight leisure trips to Luxembourg)

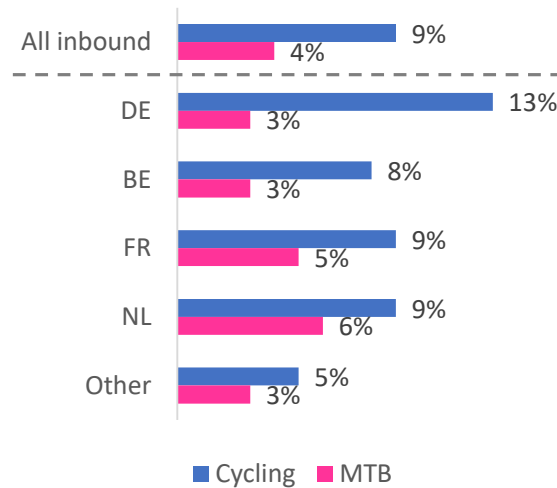
	Overnight trips: Cycling	Overnight trips: Mountainbiking
DE	23.000	12.000
BE	14.000	7.000
FR	12.000	3.000
NL	56.000	26.000
Other	38.000	17.000

# 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)

**Cycling**  
**252.000**  
(9%  
of inbound  
same-day  
leisure trips to  
Luxembourg)

**Mountain-  
biking**  
**112.000**  
(4%  
of inbound  
same-day  
leisure trips to  
Luxembourg)

	Same-day trips: Cycling	Same-day trips: Mountainbiking
DE	81.000	18.000
BE	48.000	18.000
FR	60.000	34.000
NL	37.000	26.000
Other	25.000	16.000



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

# Holiday types

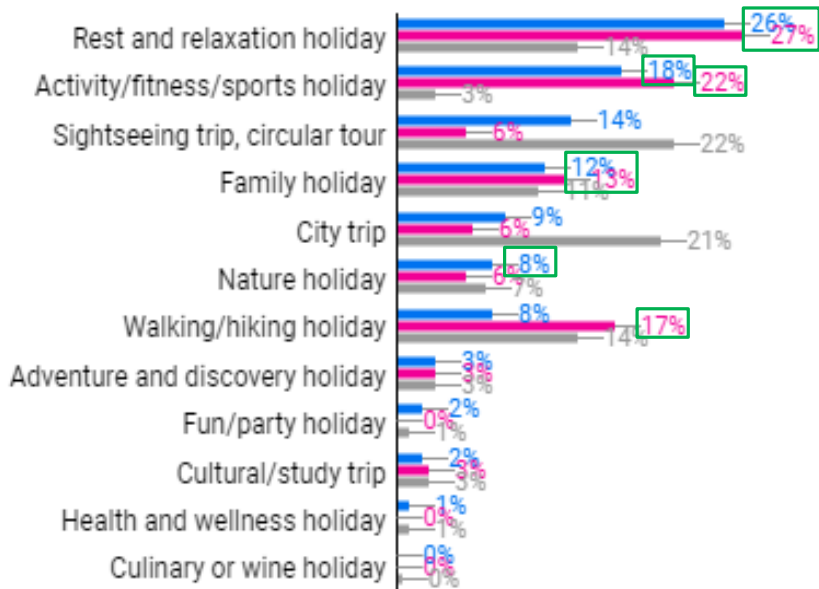
## Inbound leisure visitors with overnight, 2020-2023



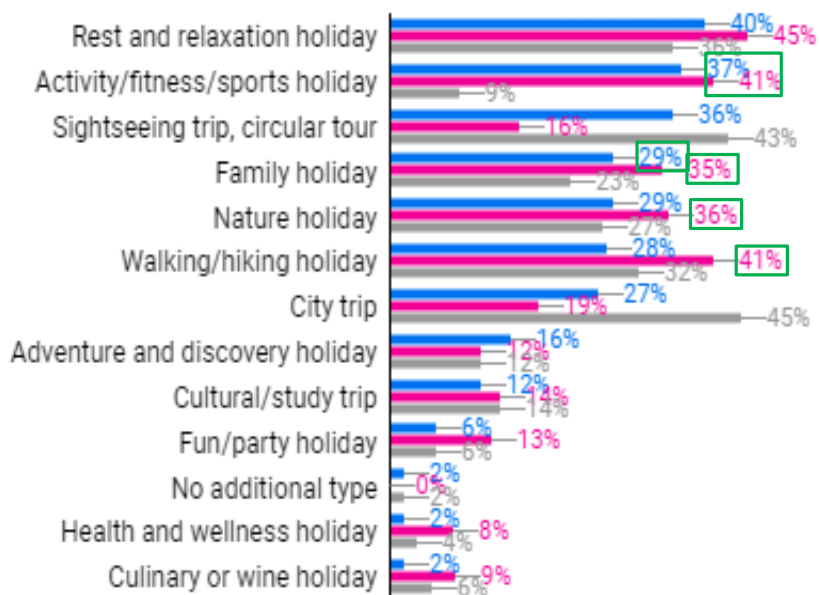
- Cycling
- Mountainbiking
- All visitors

   Significantly higher than average

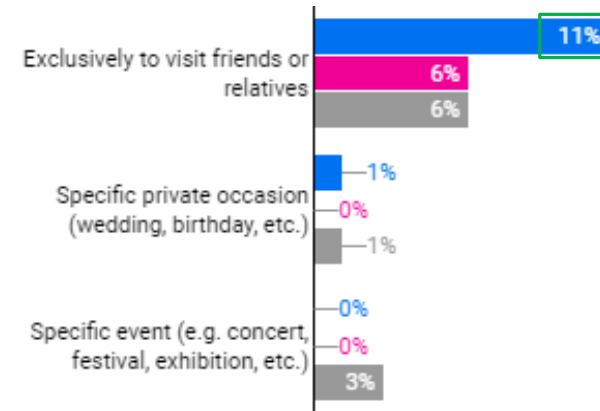
### Main holiday types



### Additional holiday types



### Main purpose of overnight trip (if not holiday)



# Types of excursions

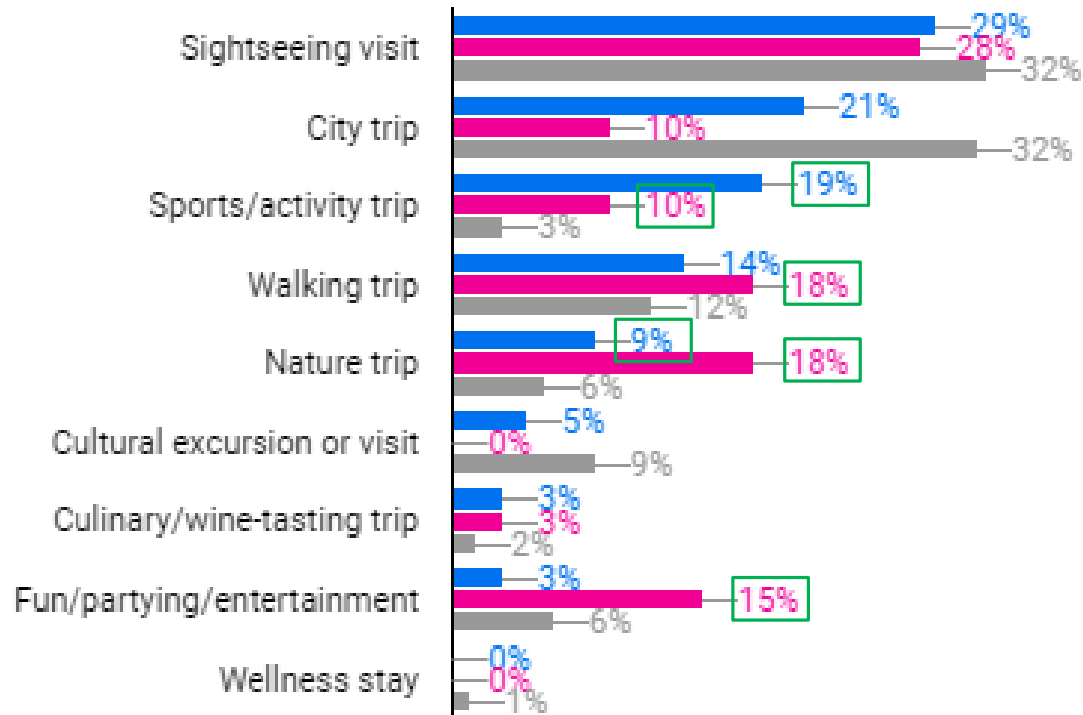
Inbound leisure same-day visitors, 2020-2023



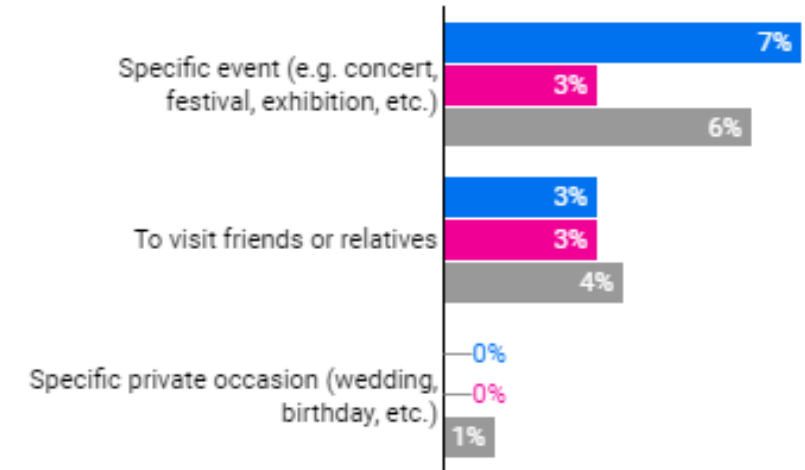
- Cycling
- Mountainbiking
- All visitors

   Significantly higher than average

**Types of excursions**



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



# Key decision criteria for choosing Luxembourg (\*)

## Inbound leisure visitors, 2020-2023



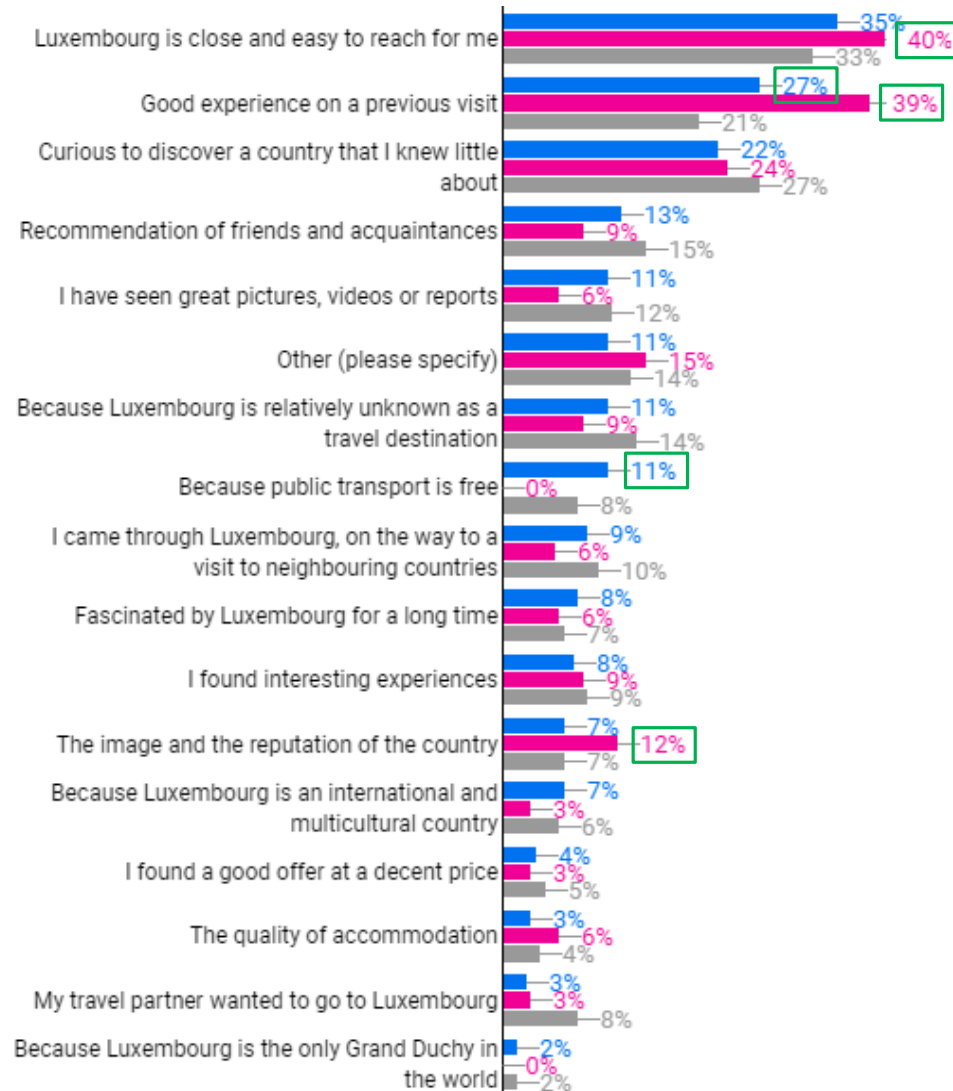
Cycling

Mountainbiking

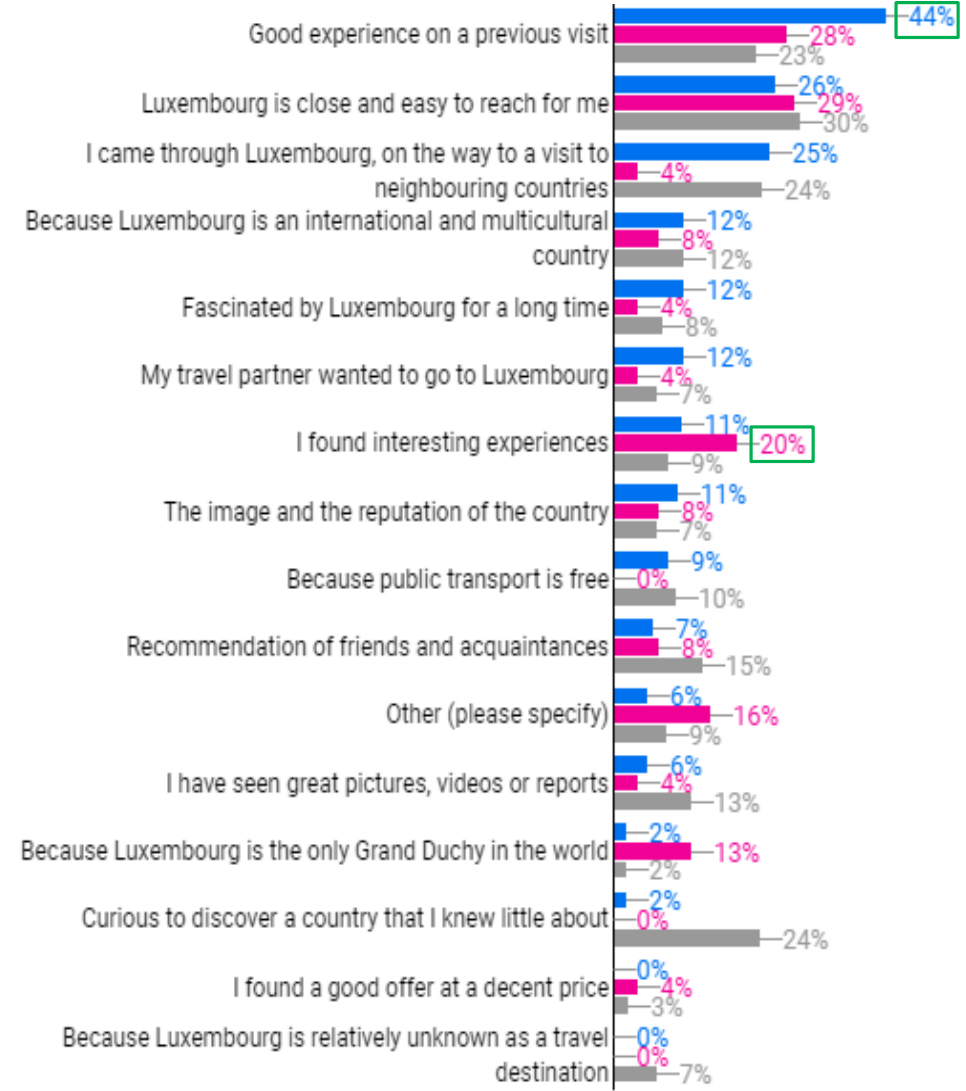
All visitors

Significantly higher than average

### Visitors with overnight



### Day visitors



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

(\*) Maximum 3 answers possible.



# Key travel motives and emotions

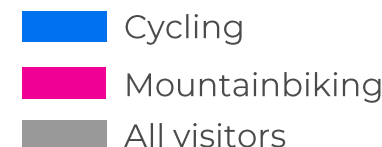
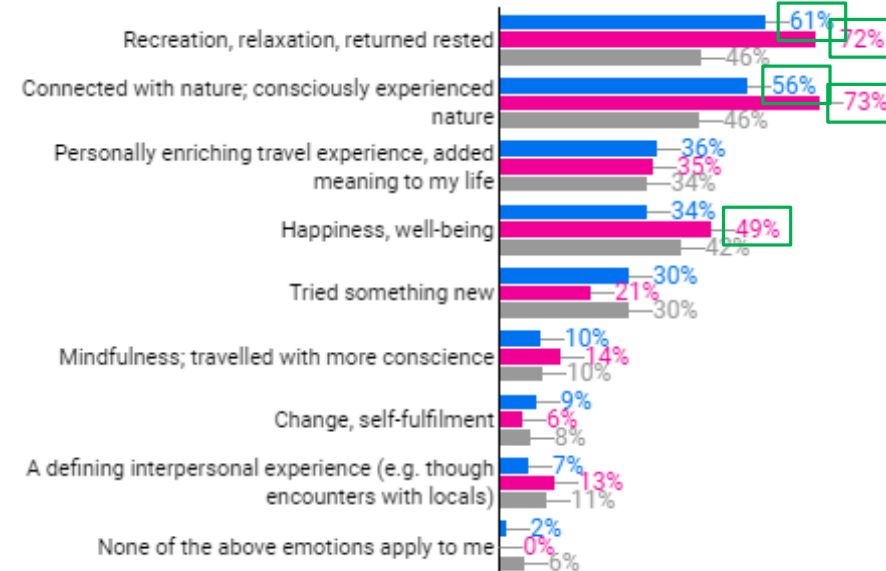
Inbound leisure visitors with overnight, 2020-2023



## Travel motives



## Emotions experienced during stay



   Significantly higher than average

# Inspiration sources

## Inbound leisure visitors, 2020-2023



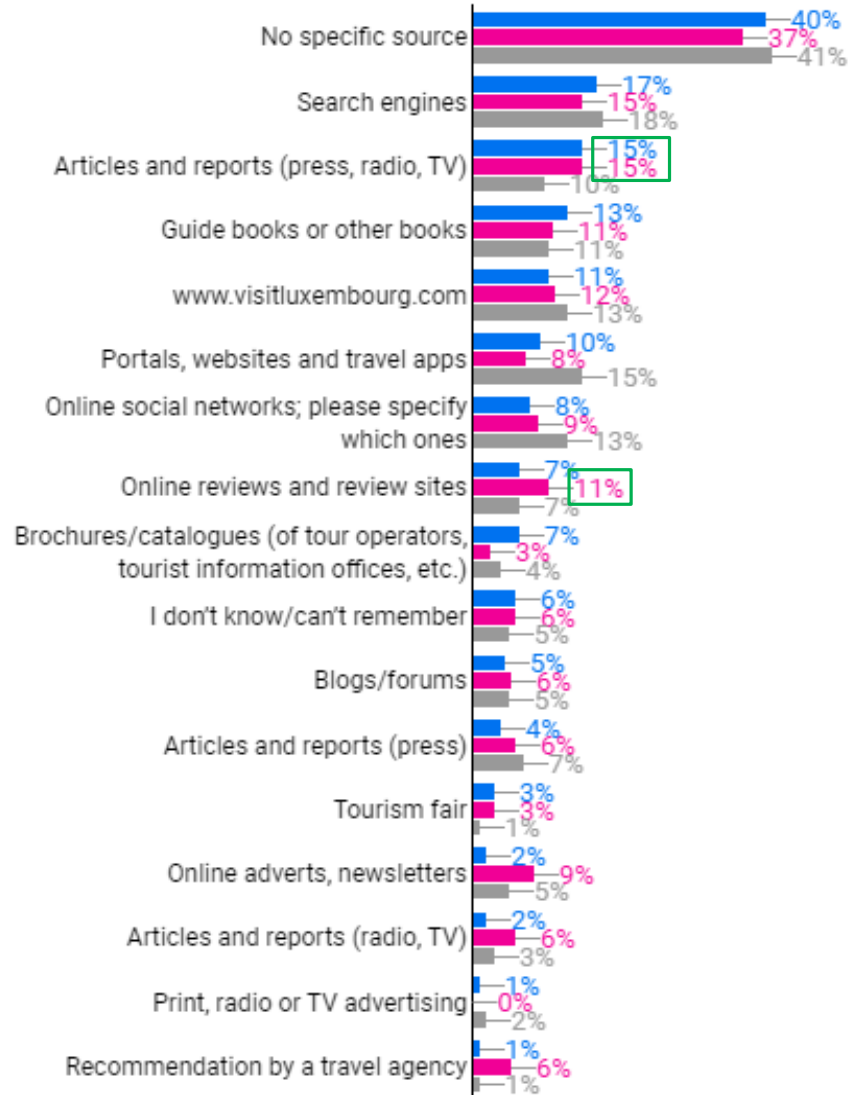
Cycling

Mountainbiking

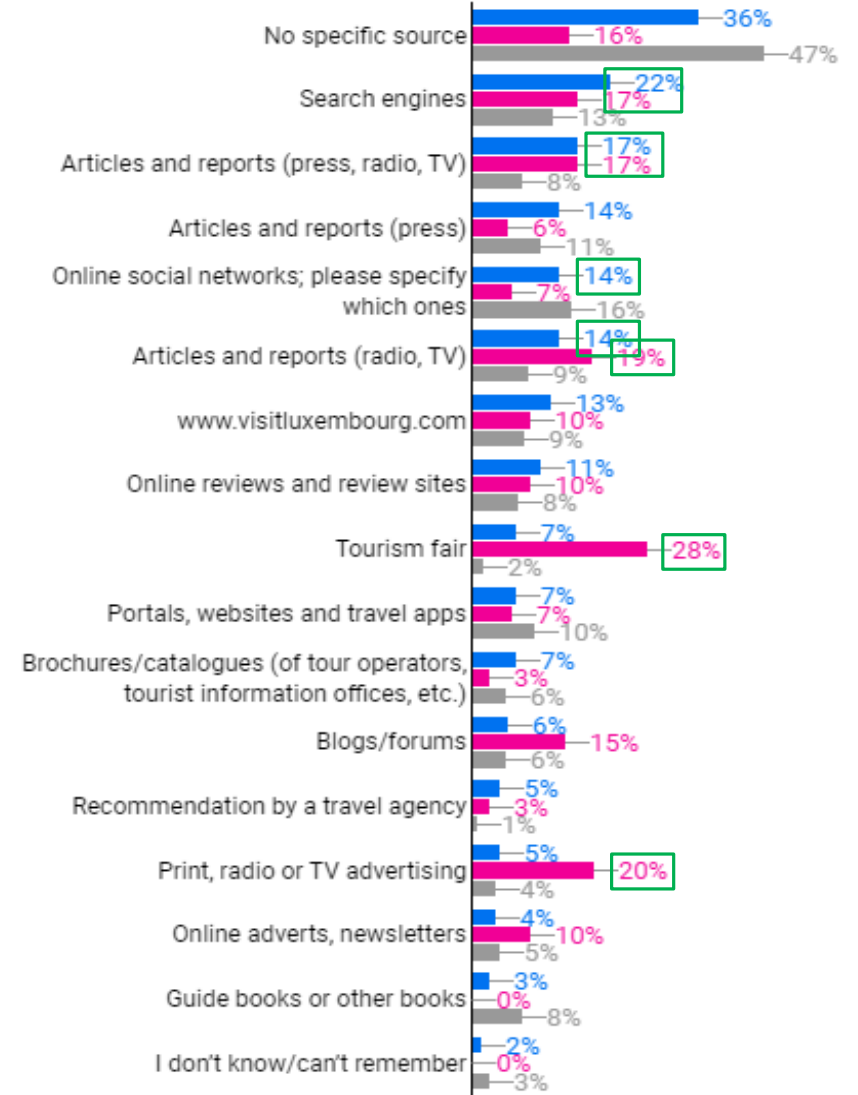
All visitors

Significantly higher than average

### Visitors with overnight

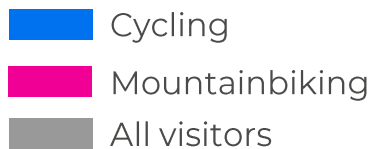


### Day visitors

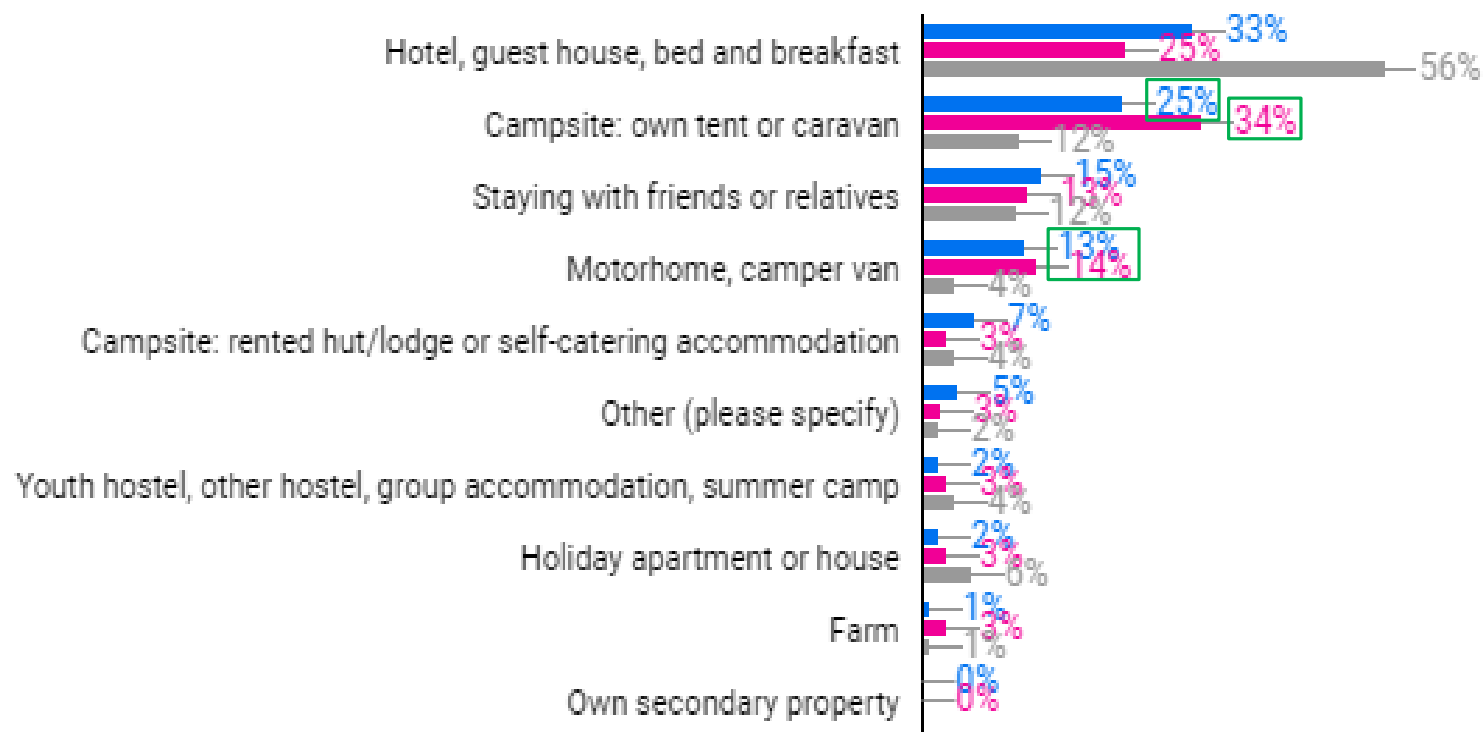


# Type of accommodation, destination regions

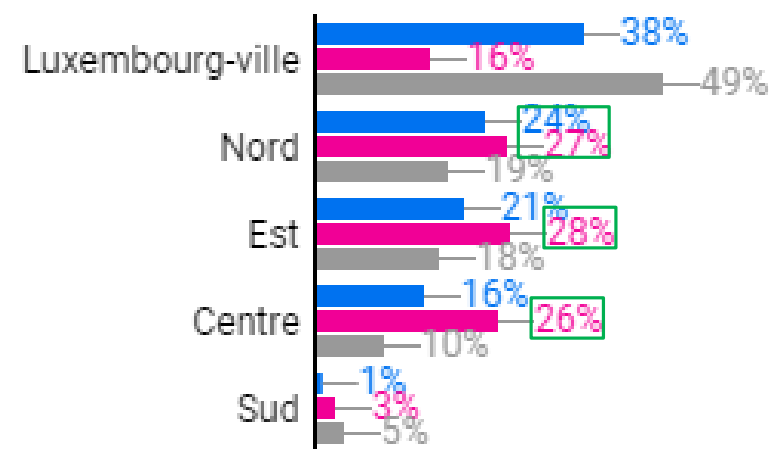
## Inbound leisure visitors with overnight, 2020-2023



### Type of accommodation



### Destination region



Significantly higher than average



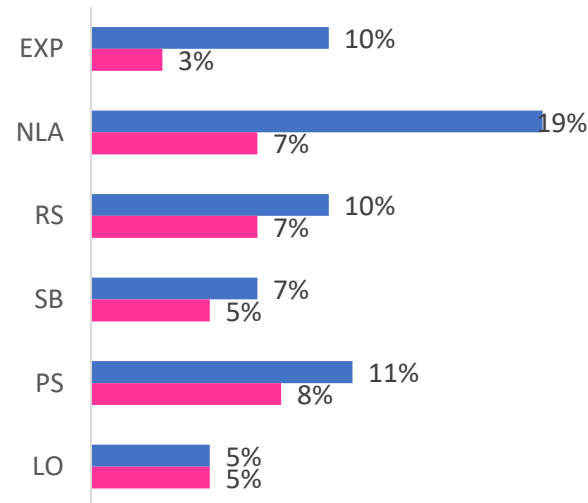
# Target segments

## Inbound leisure visitors, 2020-2023

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

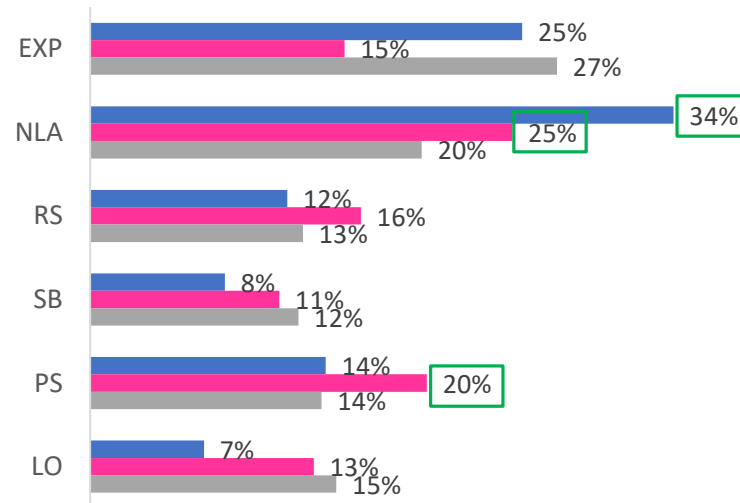
  Significantly higher than average

### Visitors with overnight



■ Cycling ■ MTB

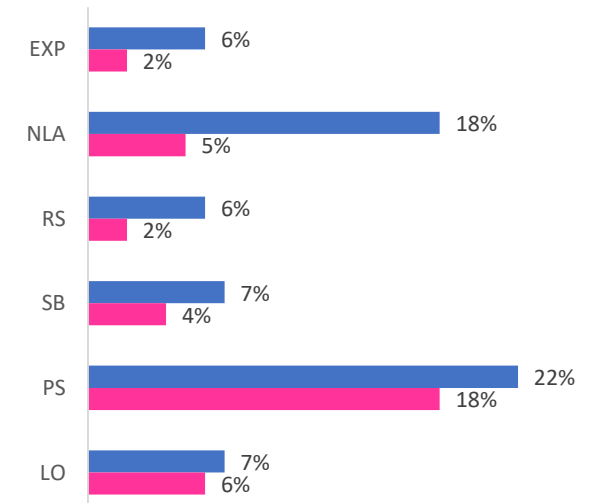
Reading example: 10% of Explorers have cycling as a holiday activity



■ Cycling ■ MTB ■ All visitors

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

### Day visitors



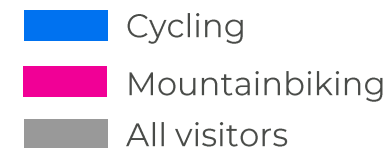
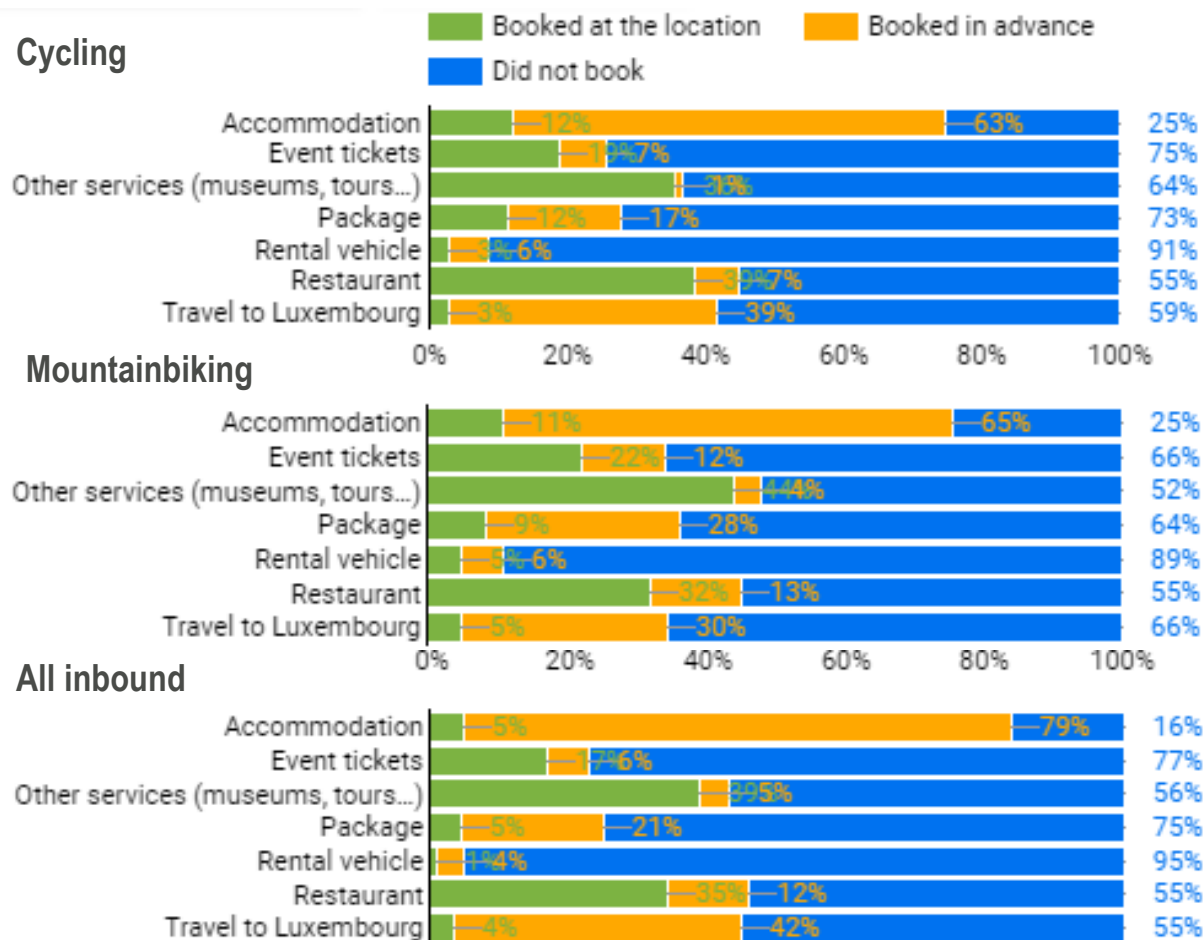
■ Cycling ■ MTB

# Booking behaviour

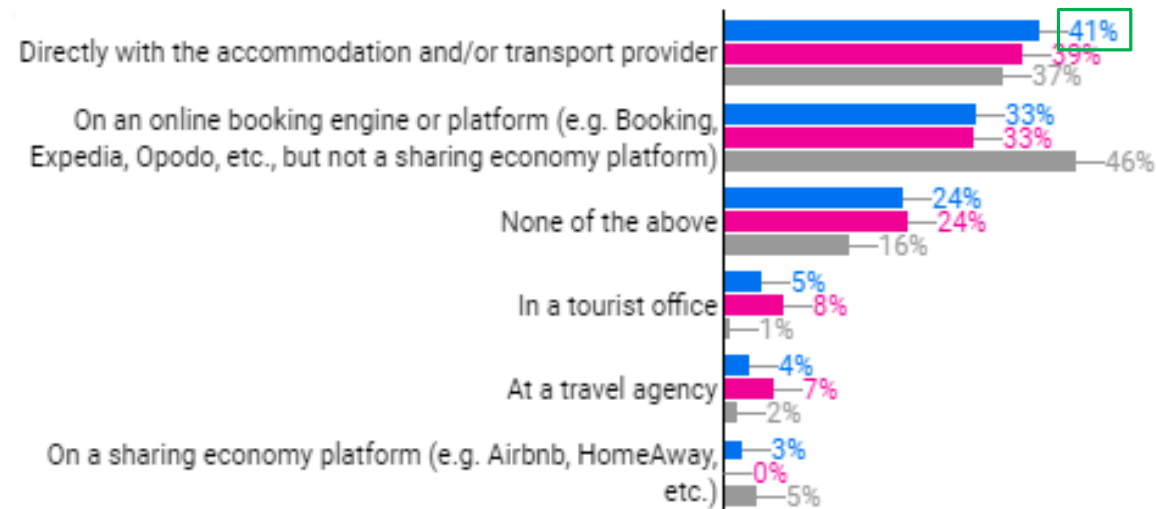
## Inbound leisure visitors with overnight, 2020-2023



### Booking of travel items



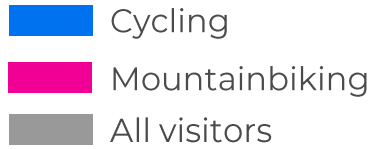
### Booking channels



41% Significantly higher than average

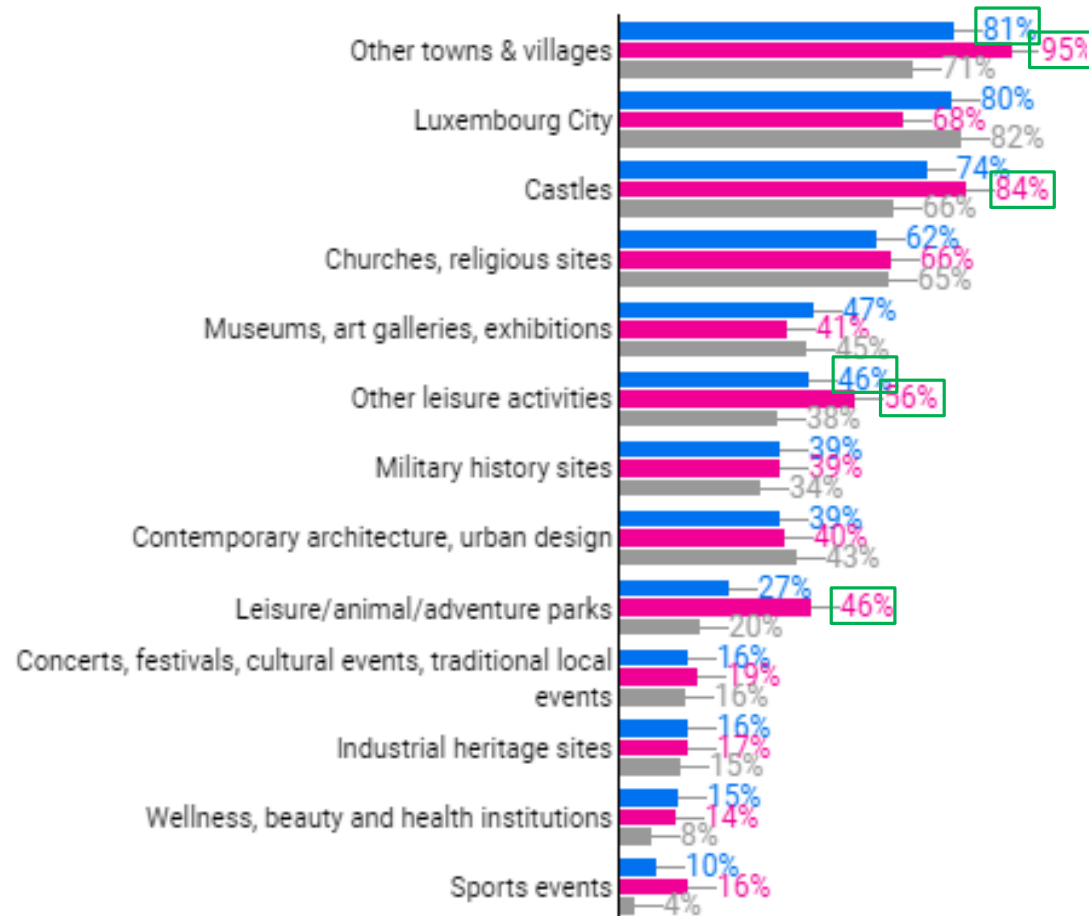
# Places visited during leisure stays

## Inbound leisure visitors, 2020-2023

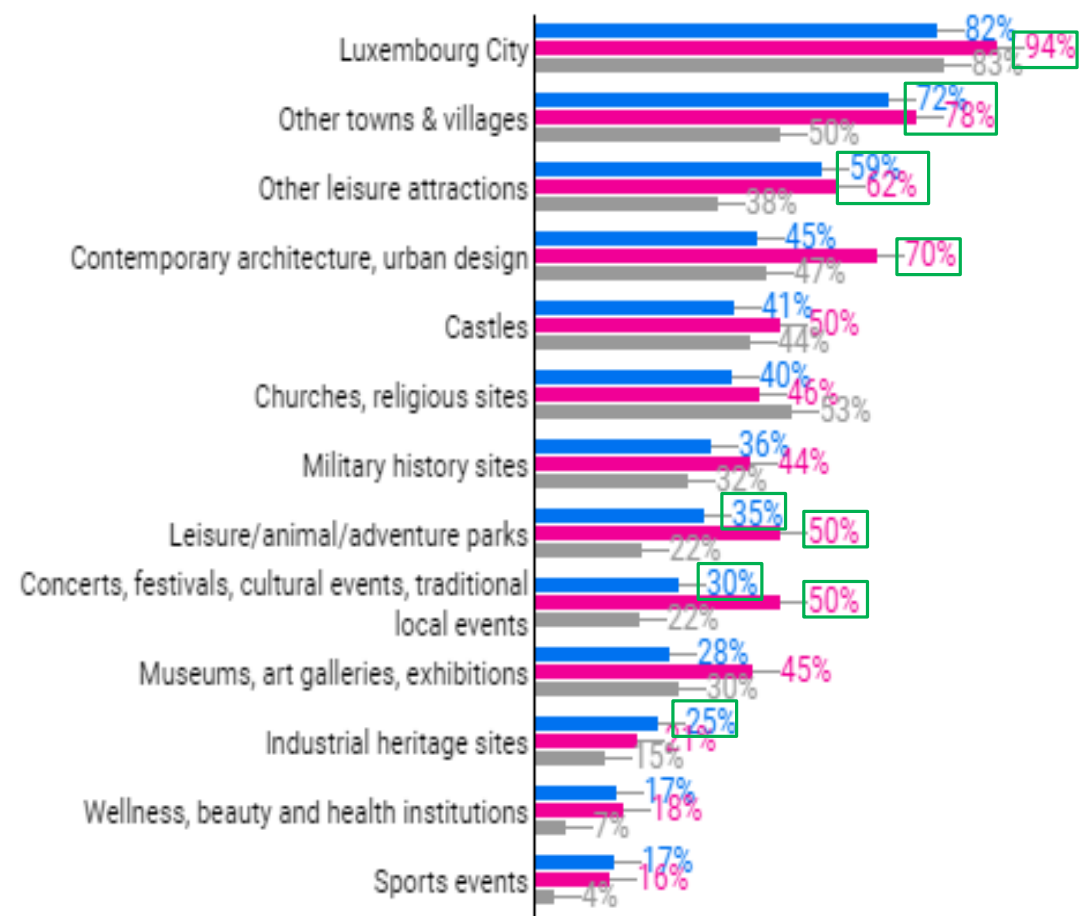


   Significantly higher than average

### Visitors with overnight



### Day visitors

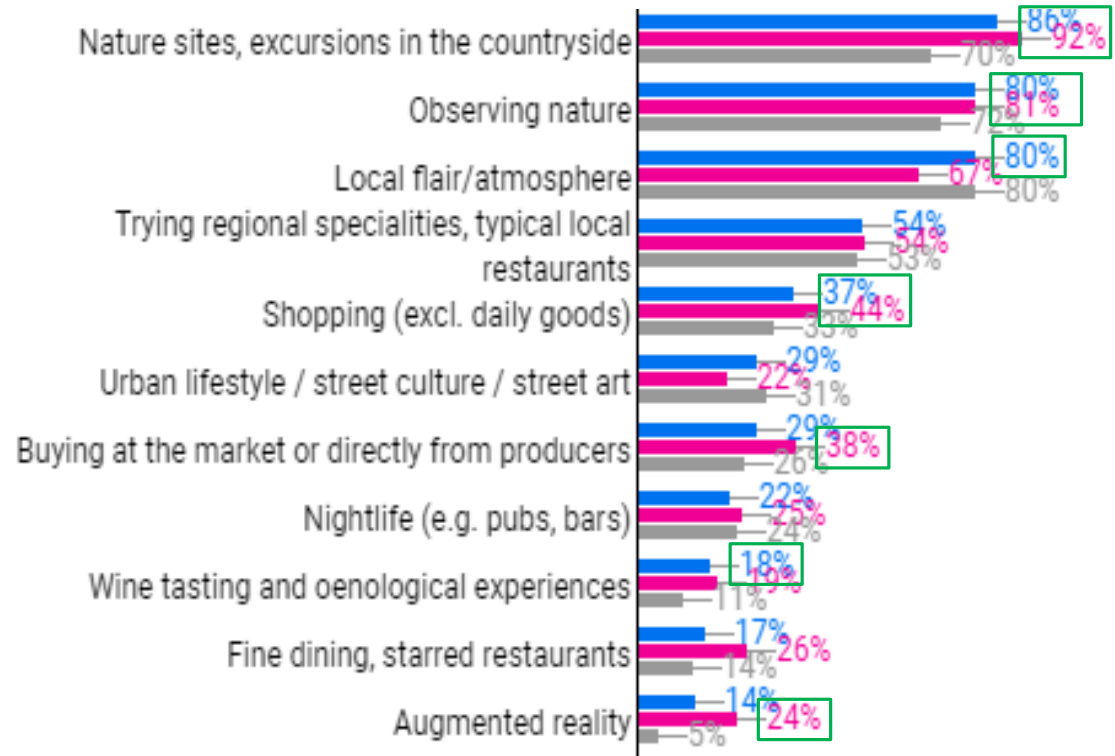


# Non-sporting activities undertaken during leisure stays

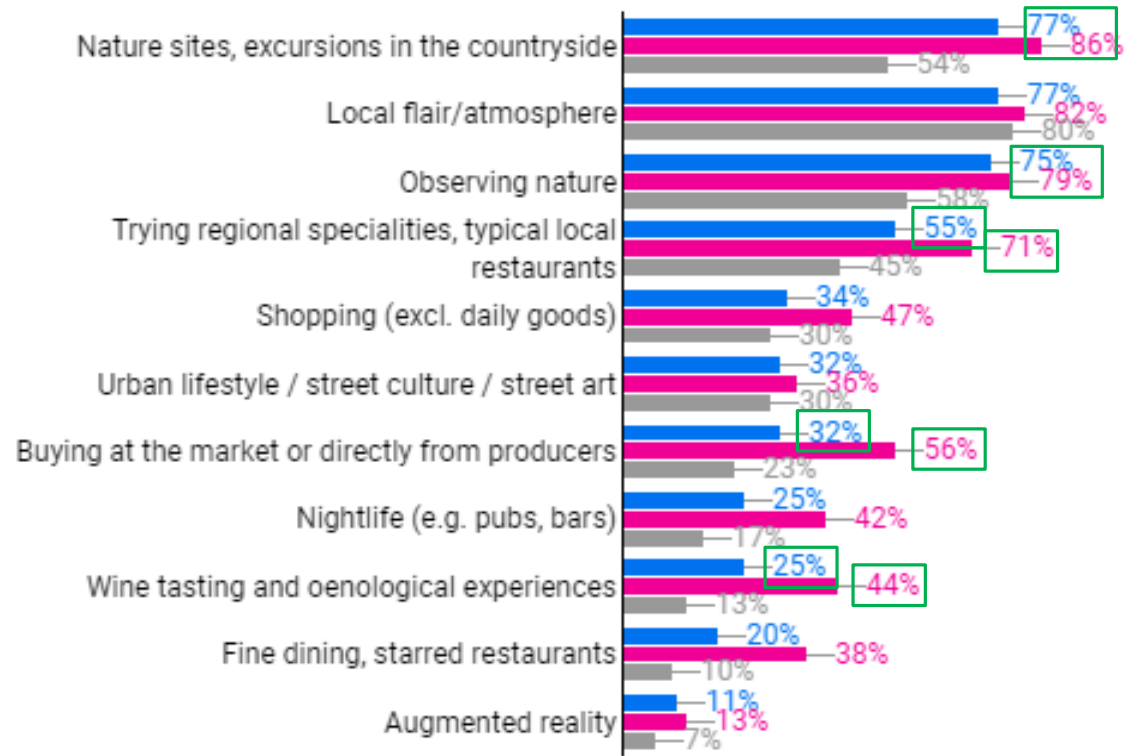
## Inbound leisure visitors, 2020-2023



### Visitors with overnight



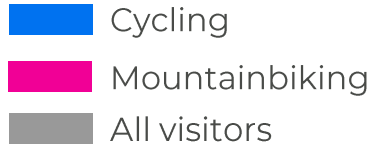
### Day visitors



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

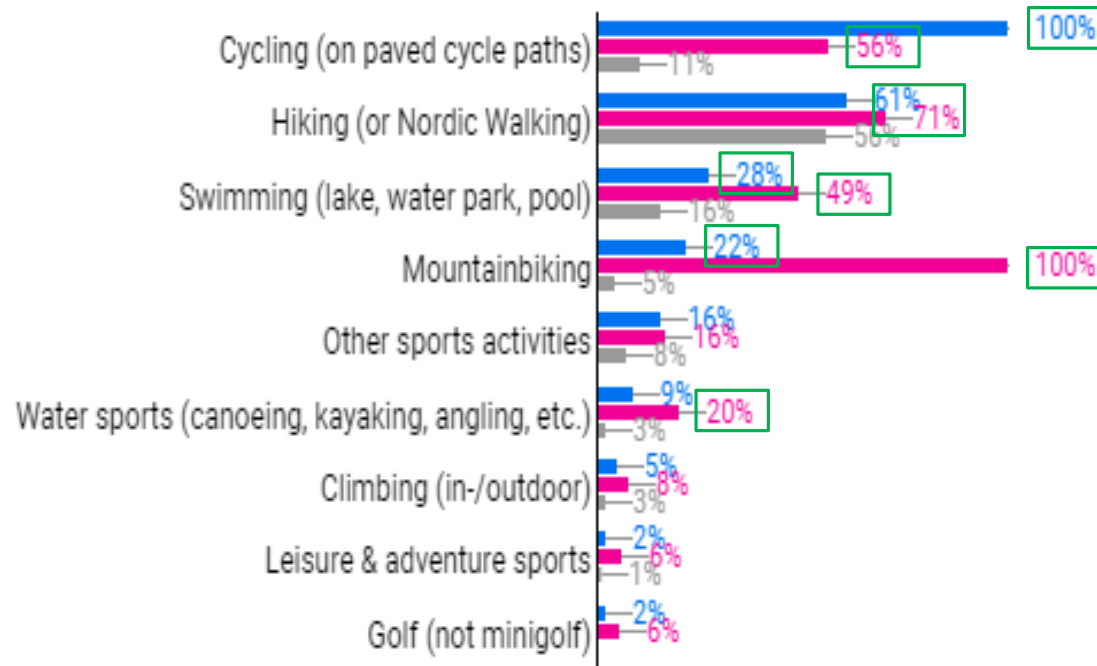
# Sporting activities undertaken during leisure stays

## Inbound leisure visitors, 2020-2023

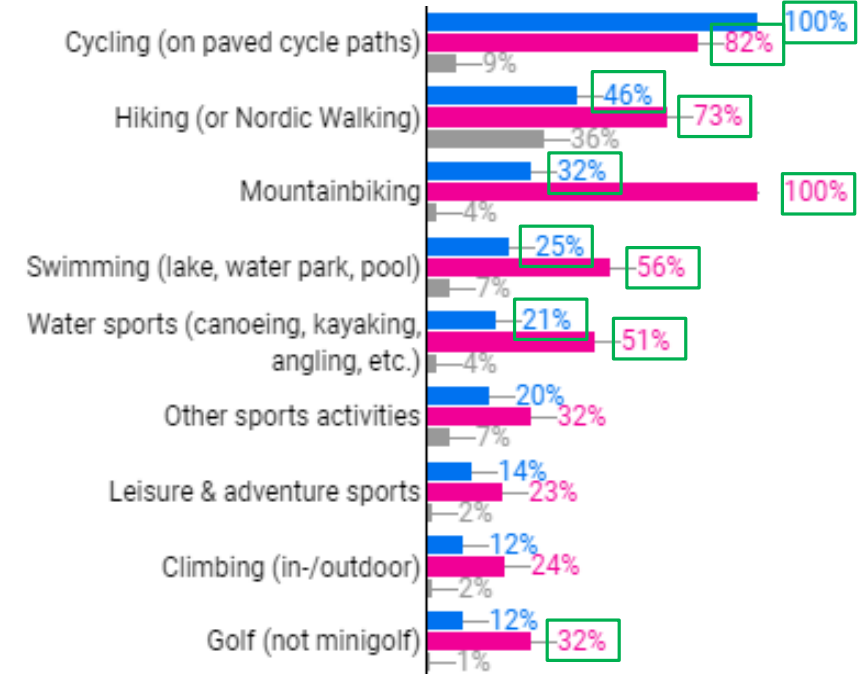


   Significantly higher than average

### Visitors with overnight



### Day visitors



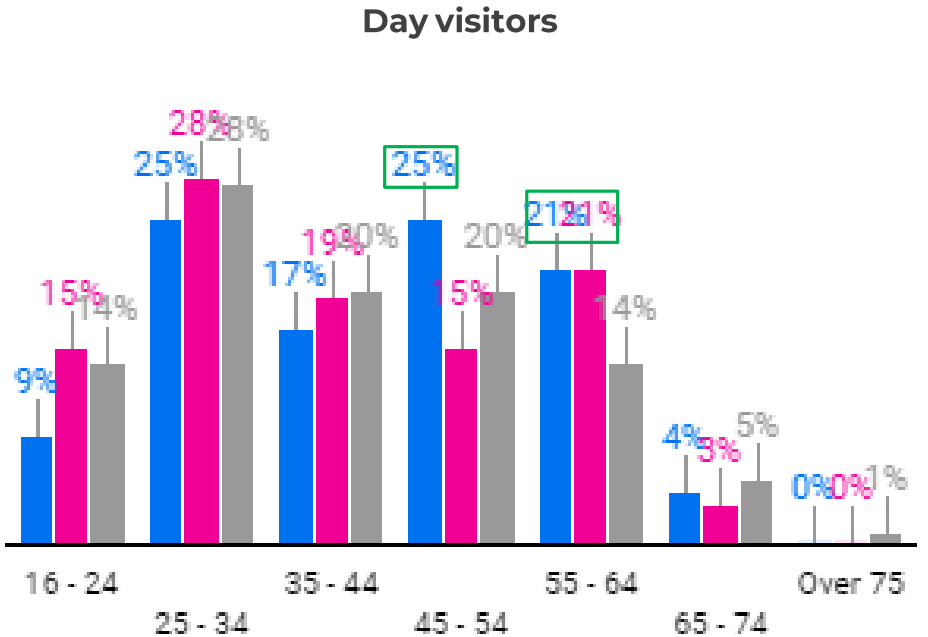
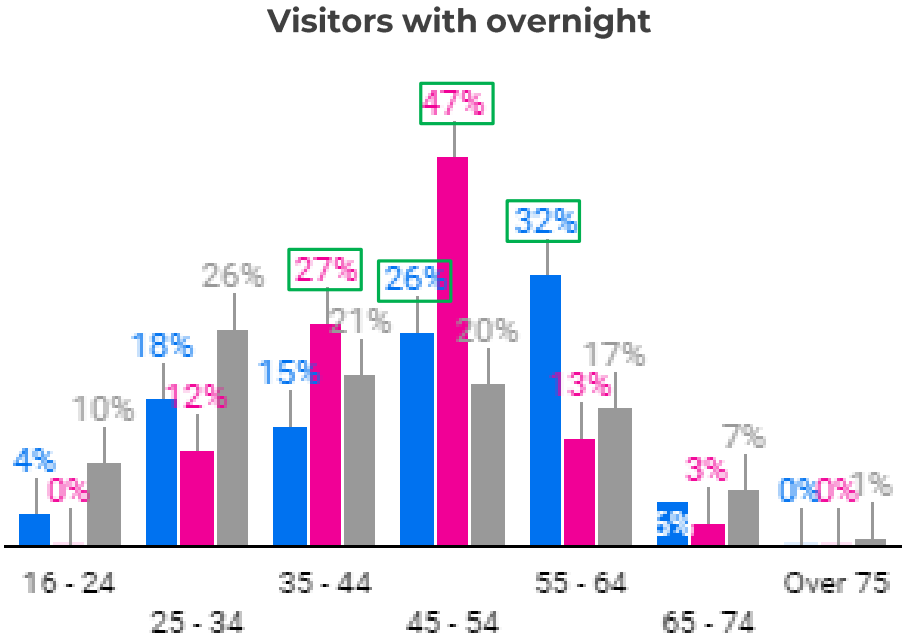




# Age groups

## Inbound leisure visitors, 2020-2023

- Cycling
- Mountainbiking
- All visitors



 Significantly higher than average

# Transport (to and in destination)

## Inbound leisure visitors, 2020-2023

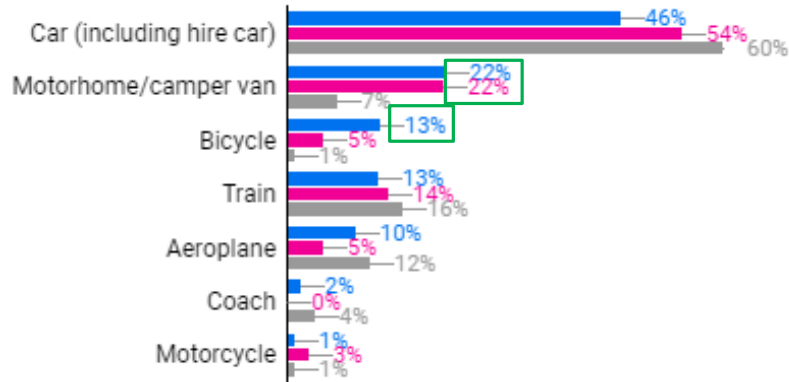


- Cycling
- Mountainbiking
- All visitors

   Significantly higher than average

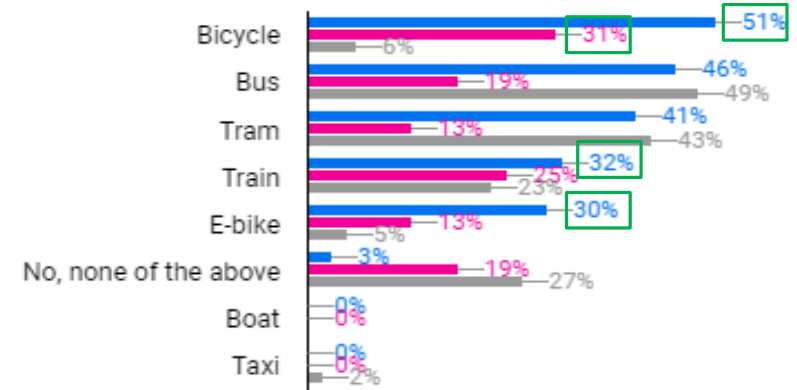
### Transport to destination

#### Visitors with overnight

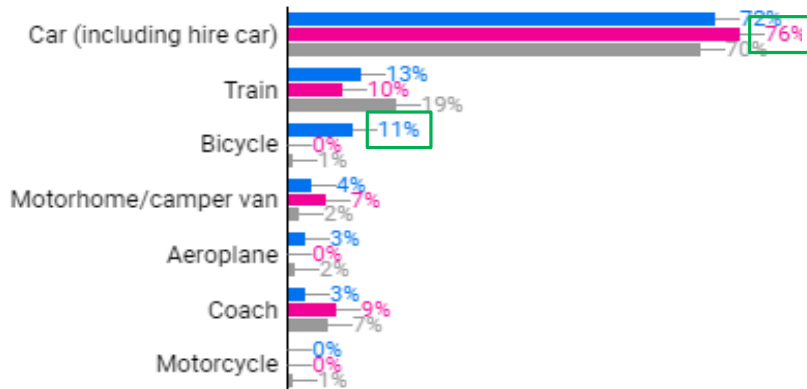


### Transport in destination

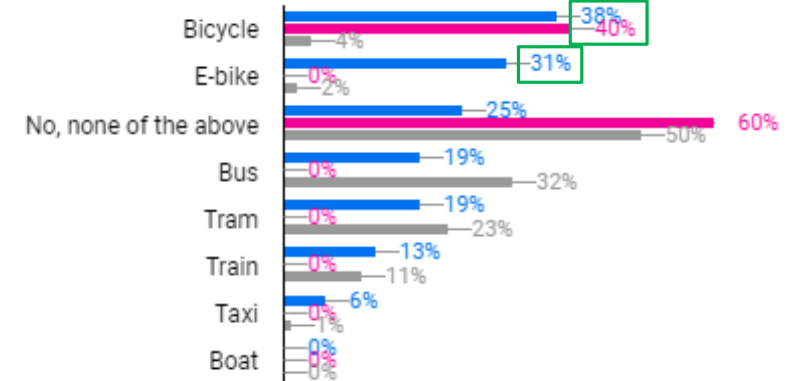
#### Visitors with overnight



#### Day visitors



#### Day visitors



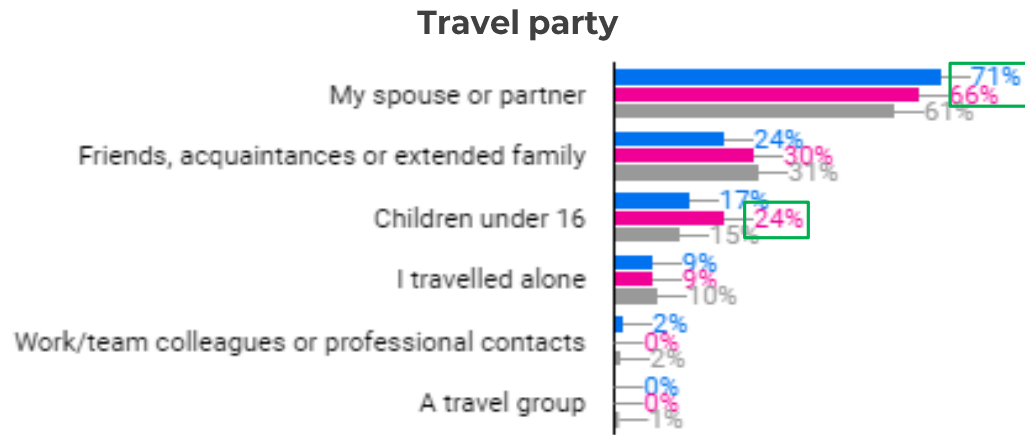
# Travel party, repeat visits and cross-border trips

## Inbound leisure visitors with overnight, 2020-2023

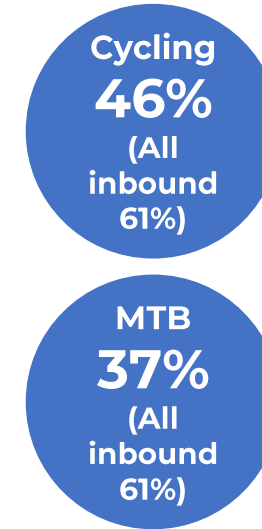


- Cycling
- Mountainbiking
- All visitors

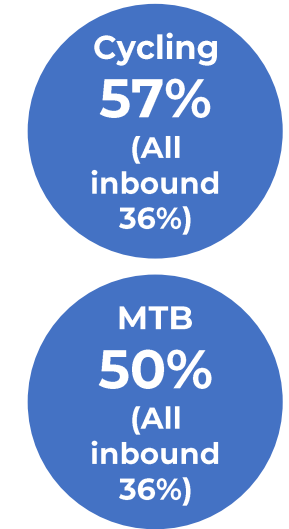
Significantly higher than average



### First-time visitors



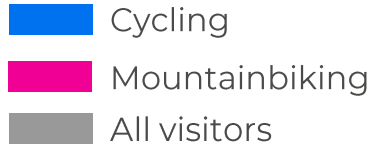
### Visitors spending nights in Luxembourg and abroad during same trip



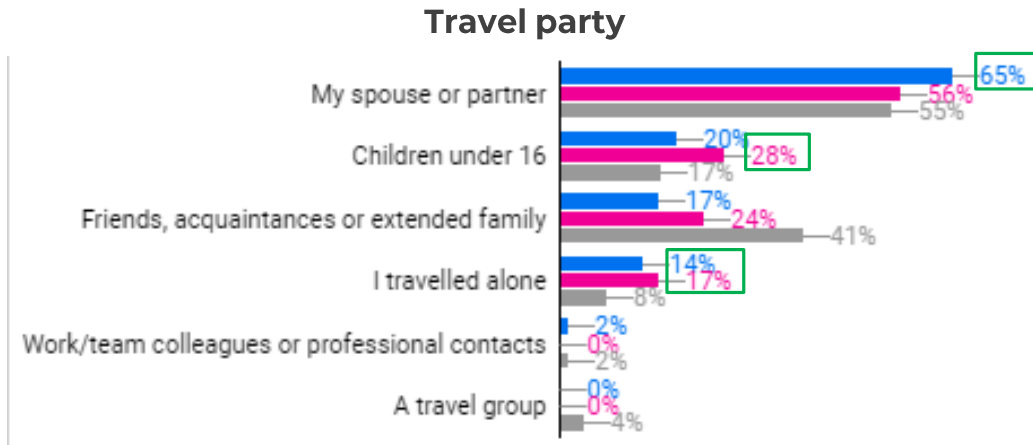


# Travel party and repeat visits

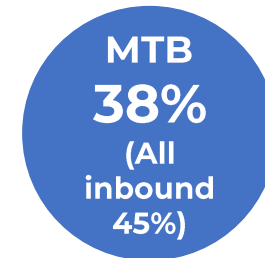
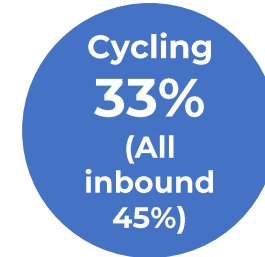
## Inbound leisure same-day visitors, 2020-2023



Significantly higher than average



### First-time visitors



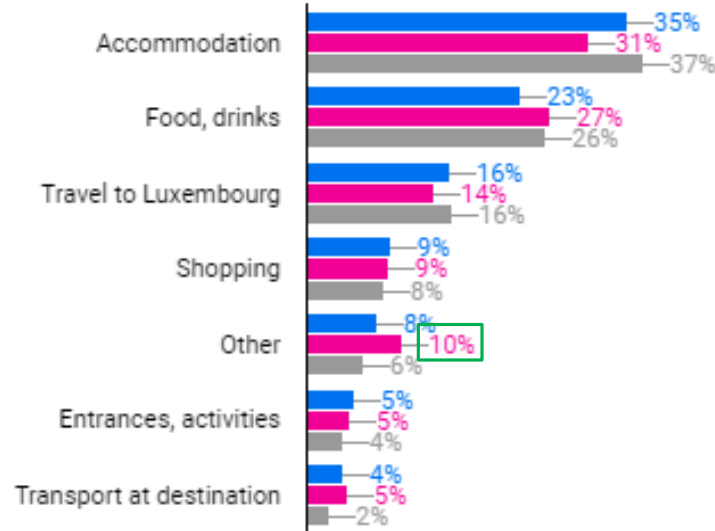
# Expenditure, length of stay and quality vs price orientation

Inbound leisure visitors with overnight, 2020-2023

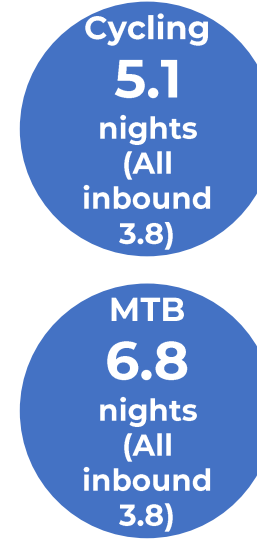


- Cycling
- Mountainbiking
- All visitors

**Breakdown of expenditure by categories**



**Length of stay**



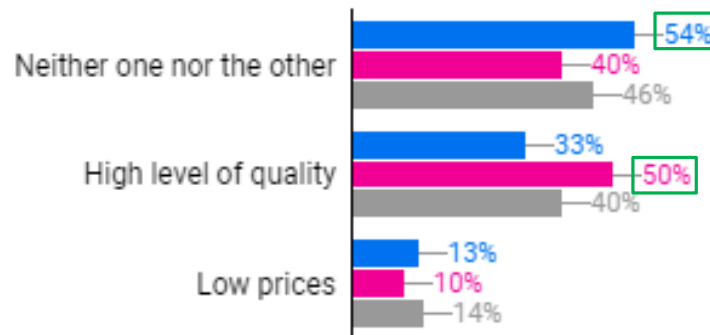
**Spend/pers./trip**



**Spend/pers./day**



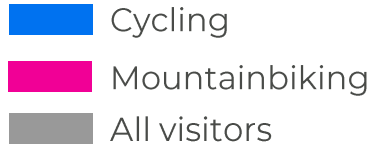
**Quality vs. price orientation**



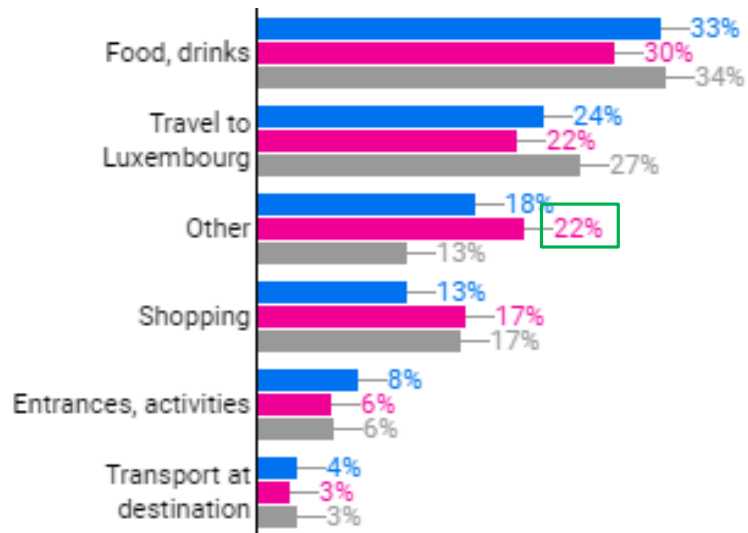
   Significantly higher than average

# Expenditure

## Inbound leisure same-day visitors, 2020-2023



### Breakdown of expenditure by categories



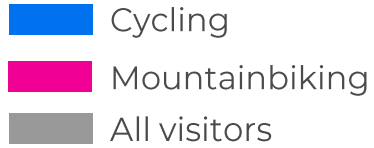
 Significantly higher than average

### Spend/pers./day trip



# Actions during stay (sustainable and services)

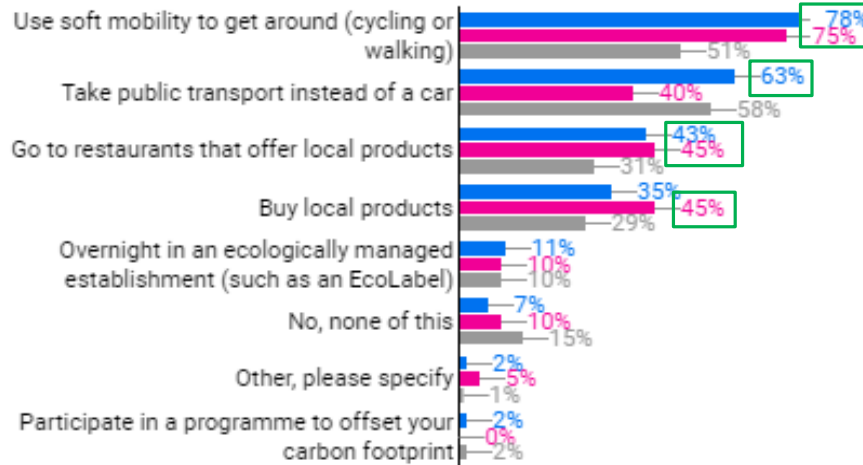
## Inbound leisure visitors, 2020-2023



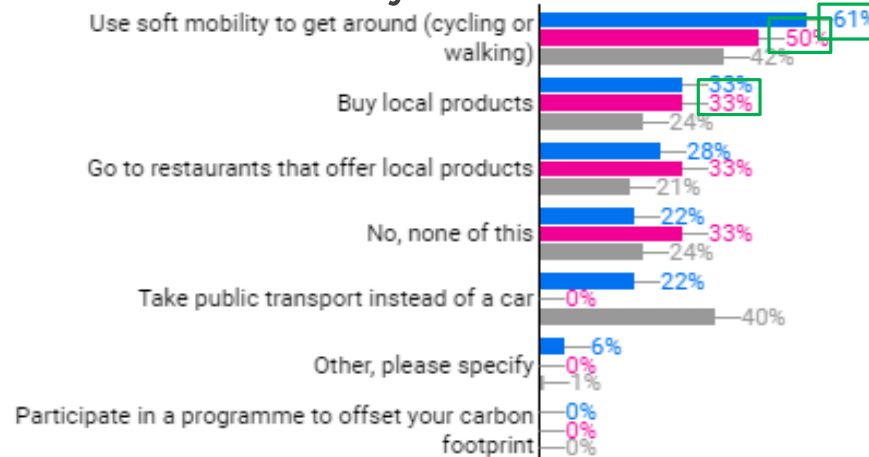
   Significantly higher than average

### Sustainable actions during stay

#### Visitors with overnight

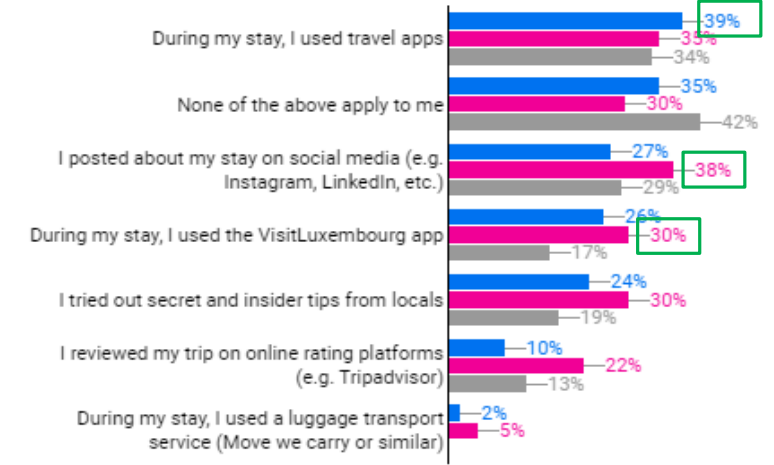


#### Day visitors

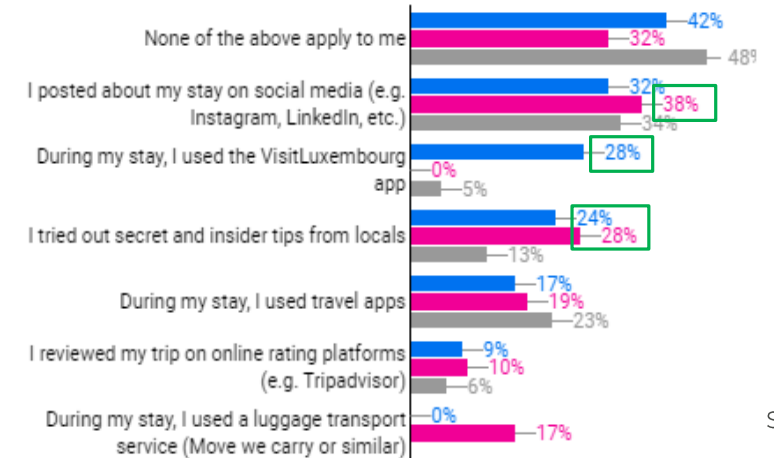


### Services used during stay

#### Visitors with overnight



#### Day visitors

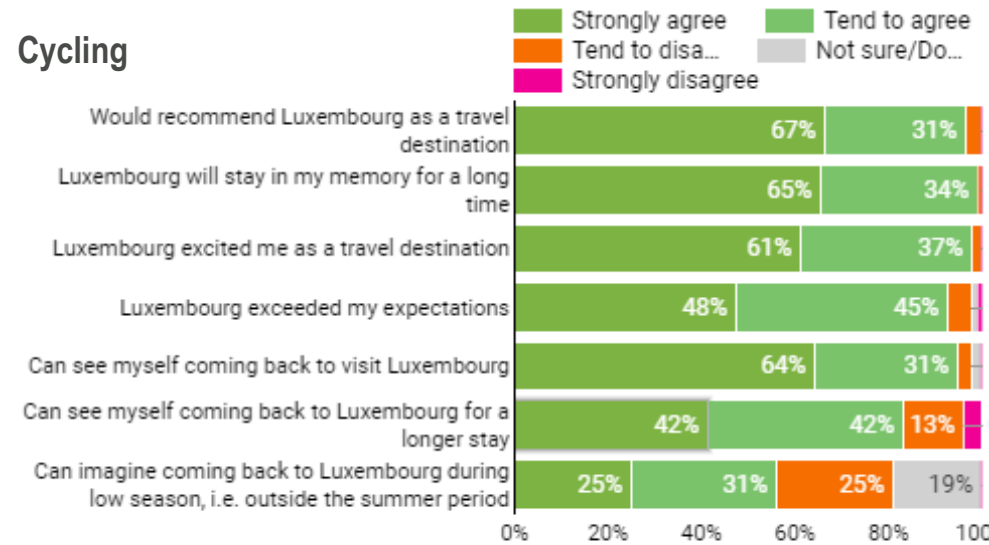


# Visitor satisfaction and recommendation

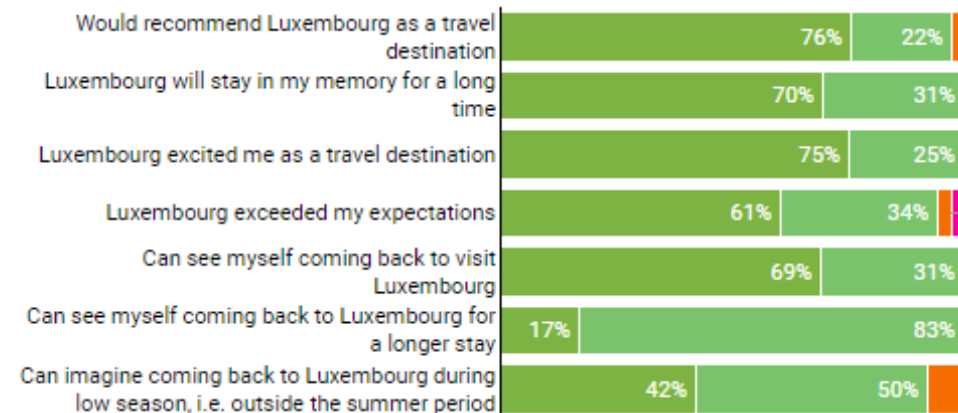
## Inbound leisure visitors with overnight, 2020-2023



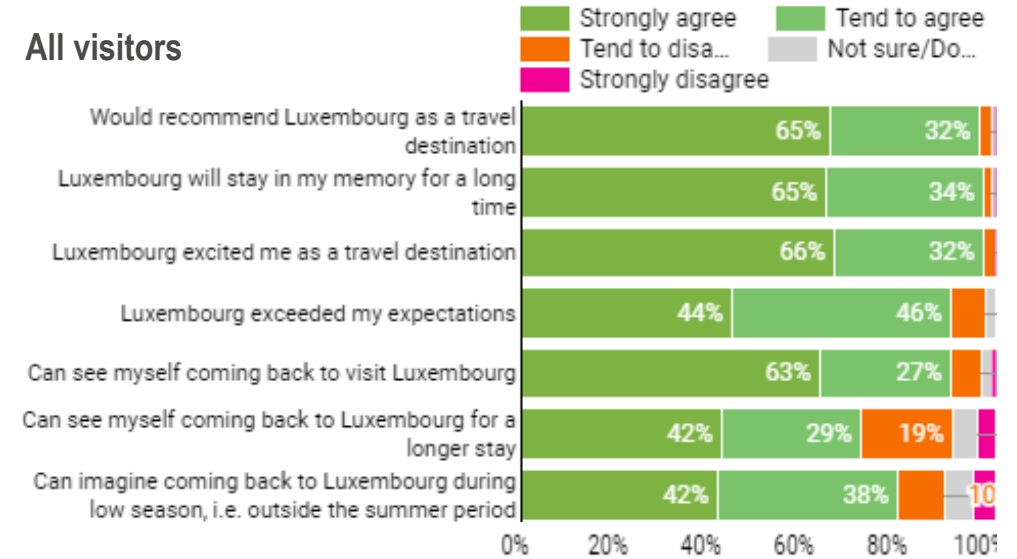
### Cycling



### Mountainbiking



### All visitors



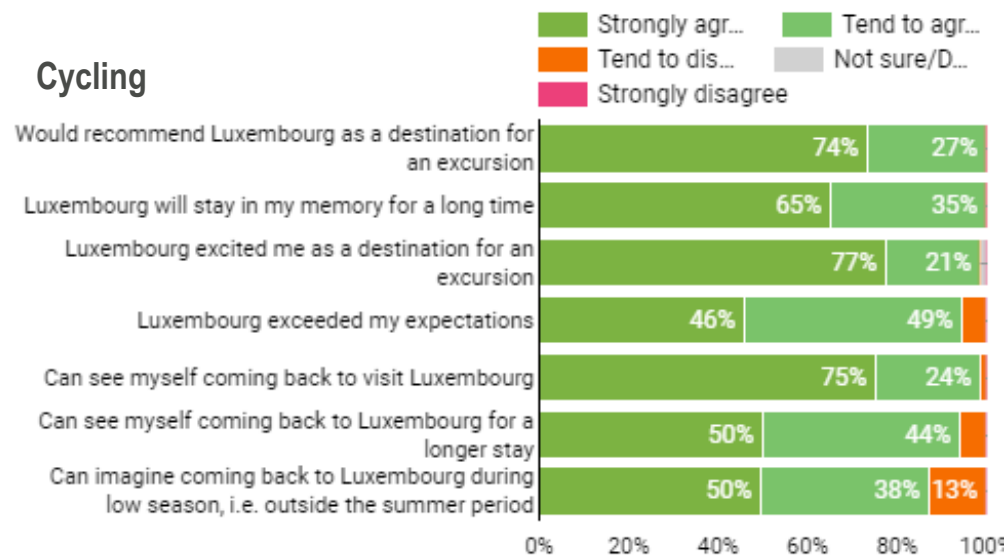


# Visitor satisfaction and recommendation

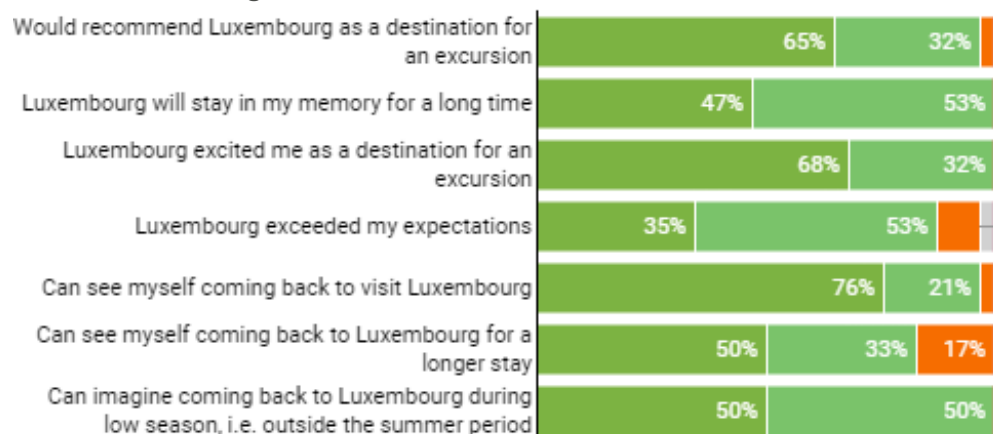
## Inbound leisure same-day visitors, 2020-2023



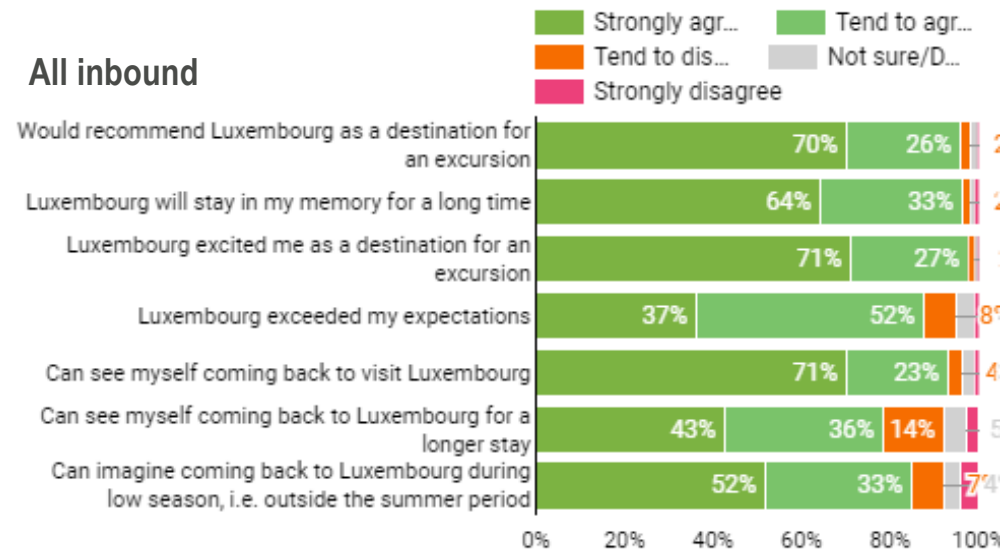
### Cycling



### Mountainbiking



### All inbound

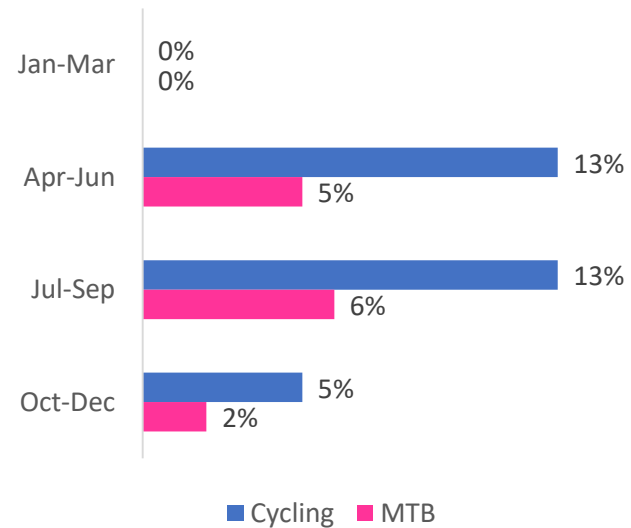


# Trip seasonality

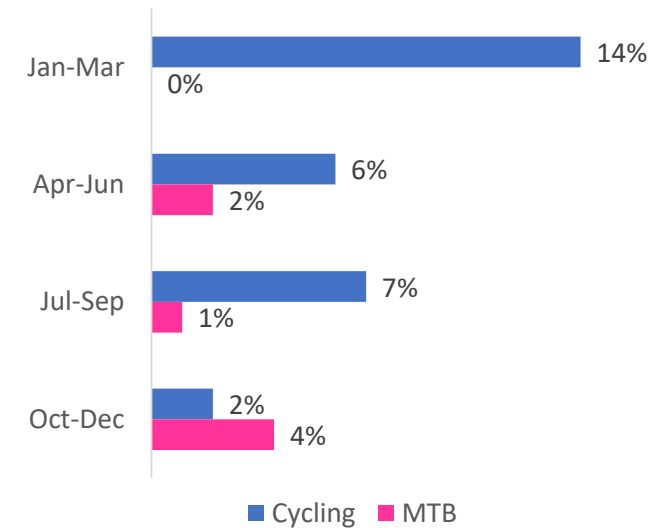
## Inbound leisure visitors, 2020-2023



### Visitors with overnight



### 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
	23	24	30%	30%	60%	2,3

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

# 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
	22	24	13%	33%	60%	2,5

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

# 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
	9	10	18%	27%	5,0
	17	20	18%	27%	0,6
	19	20	17%	24%	0,7
	19	20	12%	21%	0,8
	20	20	12%	33%	0,9









Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

(\*) Rank among all surveyed themes in respective source market.  
Based on % “suitable” for theme.  
(\*\*) Aged 18-74.

n.b. : Further information on theme interest and Luxembourg's theme competence, e.g. for past visitors and new potential visitors can be found in LFT's Brand & Potential Study report.

# 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
	20	20	14%	27%	0,5
	20	20	16%	24%	0,7
	20	20	11%	21%	0,8
	19	20	14%	33%	1,1

Themes for which Luxembourg is considered most suitable as a holiday destination, % of respondents agreeing.

(\*) Rank among all surveyed themes in respective source market.  
Based on % “suitable” for theme.  
(\*\*) Aged 18-74.

n.b. : Further information on theme interest and Luxembourg's theme competence, e.g. for past visitors and new potential visitors can be found in LFT's Brand & Potential Study report.

# General theme interest vs. Luxembourg's theme competence



## – **Cycling** (Ø DE-NL-CH-AT-BE-FR-UK)

LFT target segments

	<b>„Interested“, Rank</b>	<i>Total themes in survey</i>	<b>„Very suitable“, Rank</b>	<i>Total themes in survey</i>
<b>EXP</b>	<b>25</b>	26	<b>20</b>	26
<b>NLA</b>	<b>16</b>	26	<b>14</b>	26
<b>RS</b>	<b>25</b>	26	<b>19</b>	26
<b>SB</b>	<b>25</b>	26	<b>22</b>	26
<b>PS</b>	<b>26</b>	26	<b>25</b>	26
<b>LO</b>	<b>25</b>	26	<b>21</b>	26



# General theme interest vs. Luxembourg's theme competence



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

LFT target segments

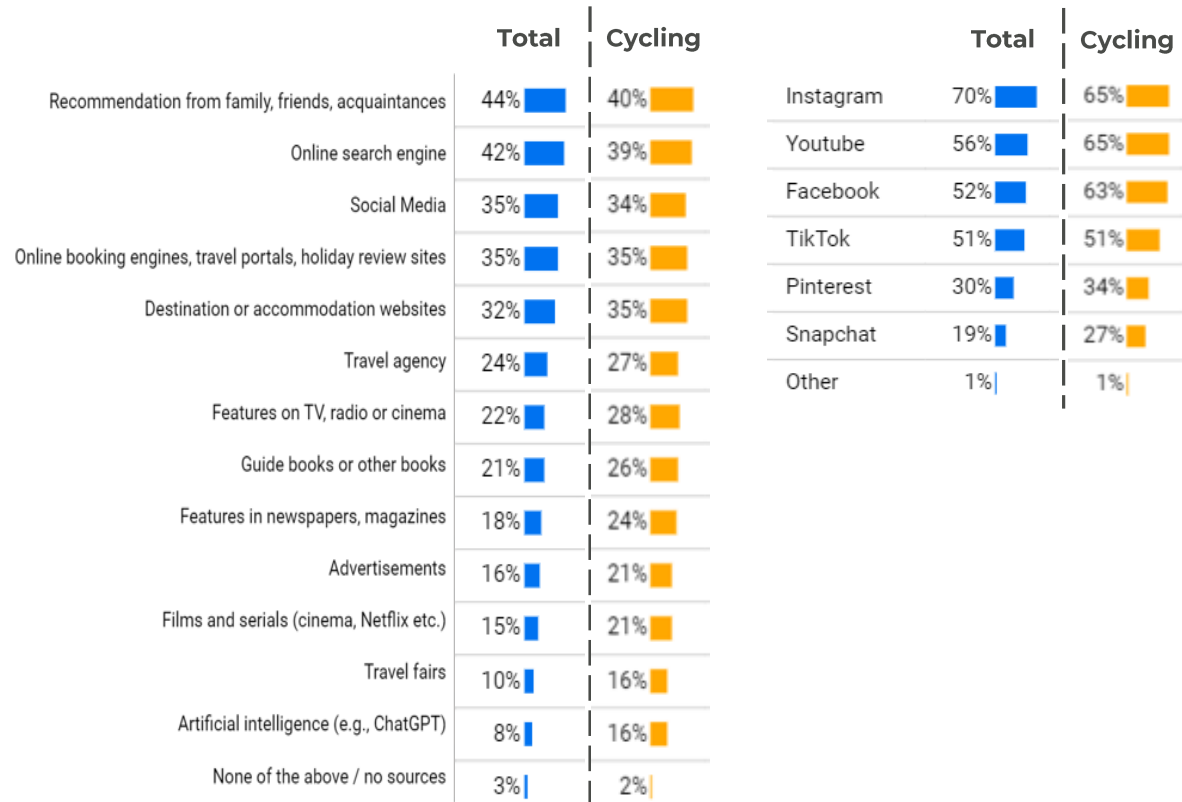
	<b>„Interested“, Rank</b>	<i>Total themes in survey</i>	<b>„Very suitable“, Rank</b>	<i>Total themes in survey</i>
<b>EXP</b>	<b>26</b>	26	<b>26</b>	26
<b>NLA</b>	<b>23</b>	26	<b>20</b>	26
<b>RS</b>	<b>26</b>	26	<b>25</b>	26
<b>SB</b>	<b>26</b>	26	<b>23</b>	26
<b>PS</b>	<b>25</b>	26	<b>26</b>	26
<b>LO</b>	<b>26</b>	26	<b>23</b>	26

# Trip organisation and preferences (1) (\*)

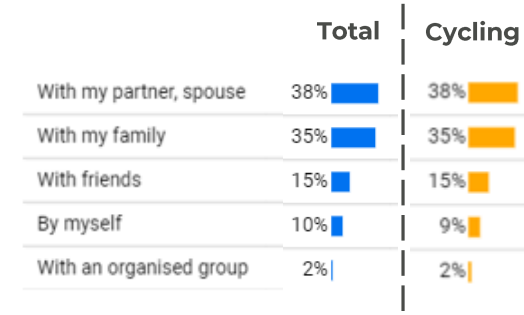
— Average **European source markets**, total vs. travellers interested in cycling



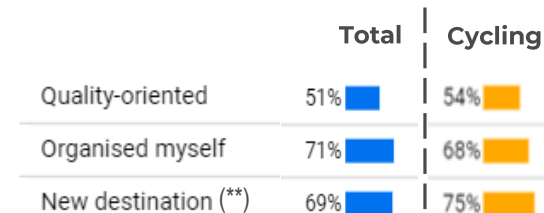
## Preferred sources of travel inspiration



## Travel party



## Quality orientation, self-organisation, new destination



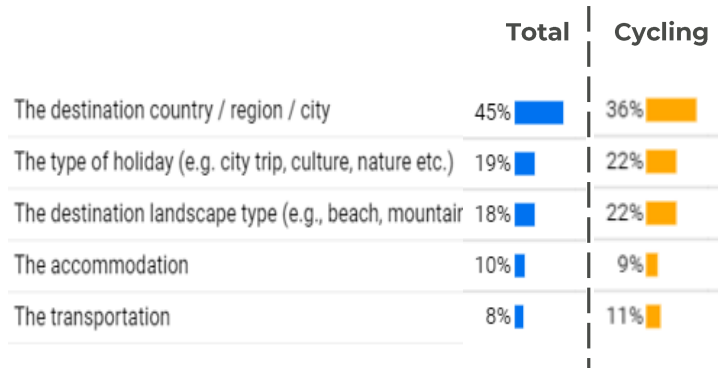
(\*) During last outbound holiday trip.  
 (\*\*) Travelled to a destination never visited before.

# Trip organisation and preferences (2) (\*)

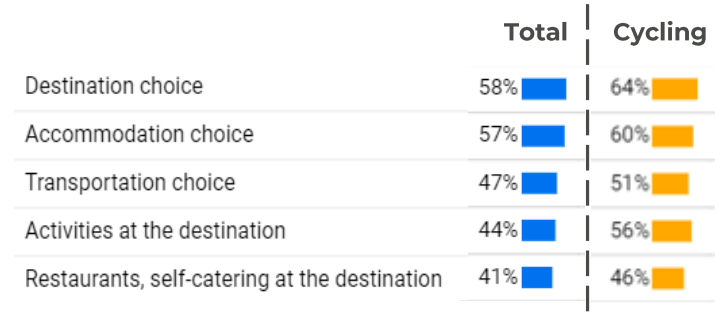
— Average **European source markets**, total vs. travellers interested in cycling



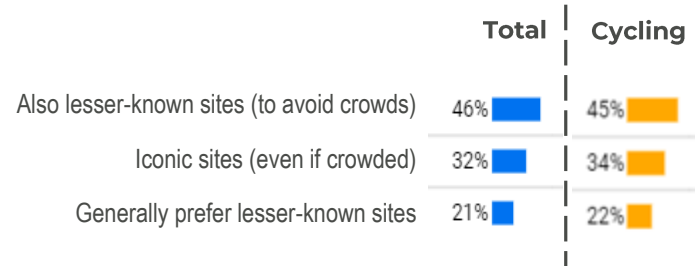
## Aspects of trip first decided



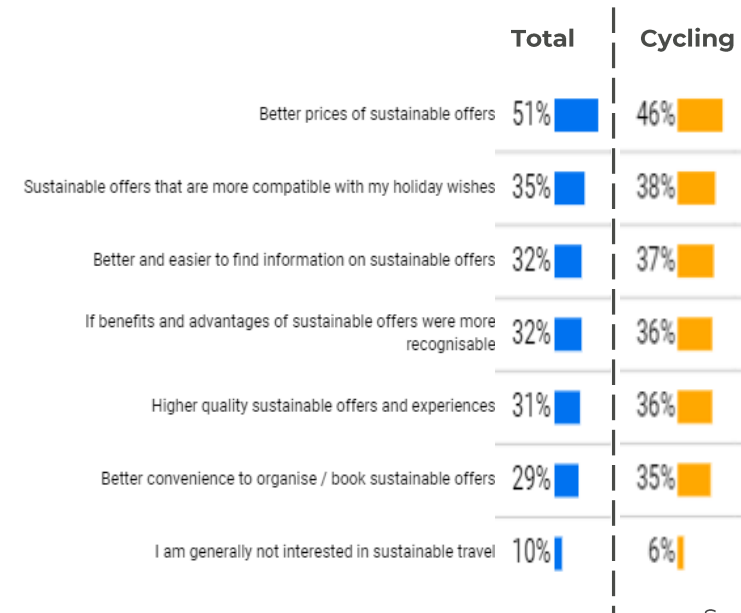
## Importance of sustainability for choice of trip components



## General preference for visiting iconic vs. lesser-known sites



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



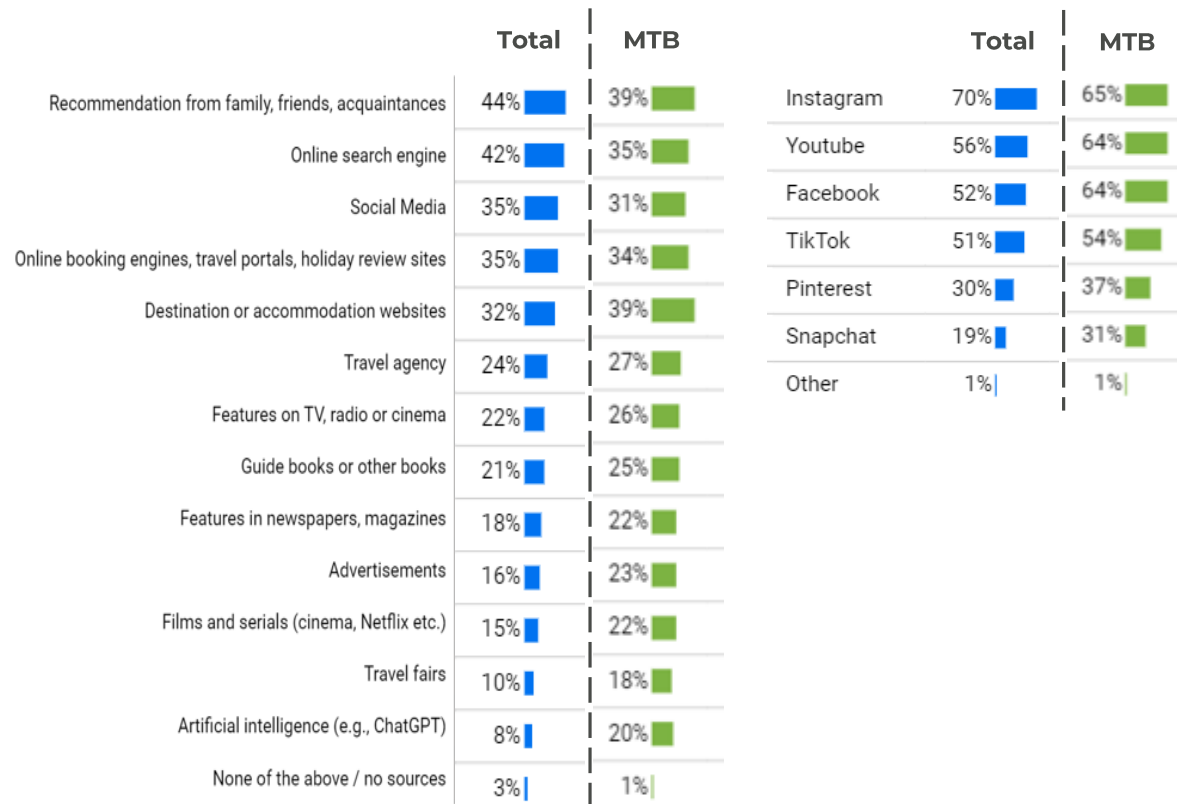
(\*) During last outbound holiday trip.

# Trip organisation and preferences (1) (\*)

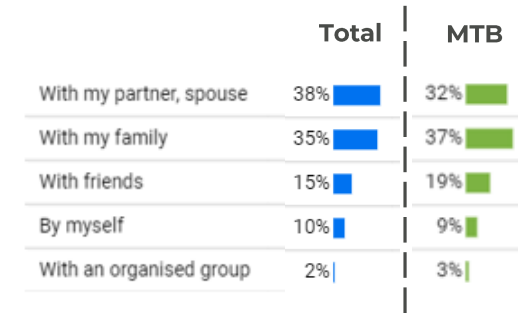
— Average **European source markets**, total vs. travellers interested in mountainbiking



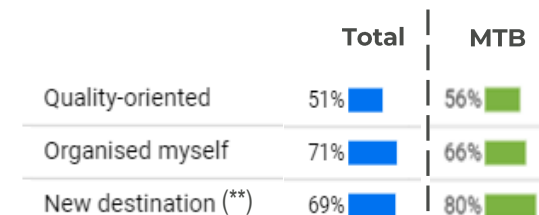
## Preferred sources of travel inspiration



## Travel party



## Quality orientation, self-organisation, new destination



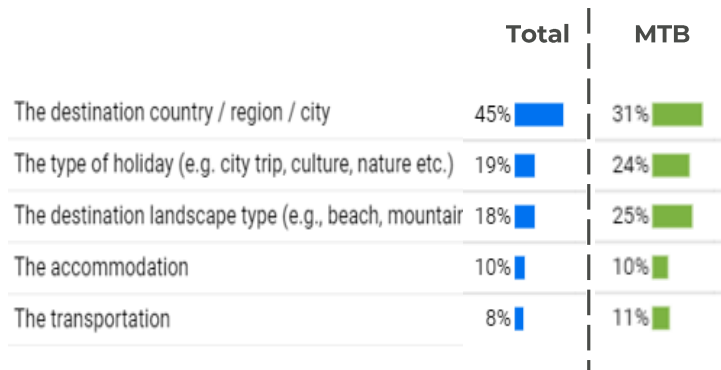
(\*) During last outbound holiday trip.  
 (\*\*) Travelled to a destination never visited before.

# Trip organisation and preferences (2) (\*)

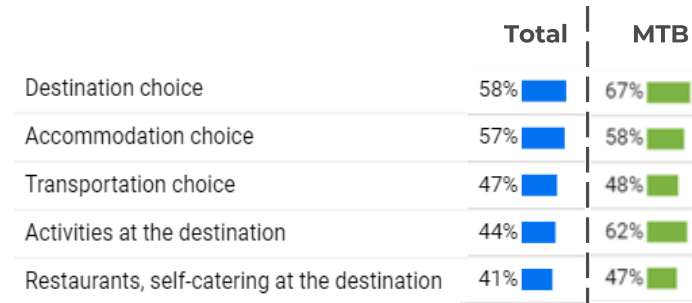
— Average **European source markets**, total vs. travellers interested in mountainbiking



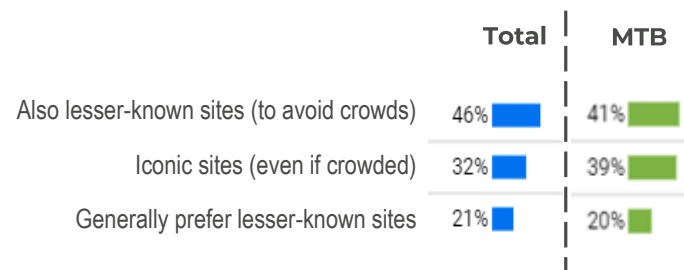
## Aspects of trip first decided



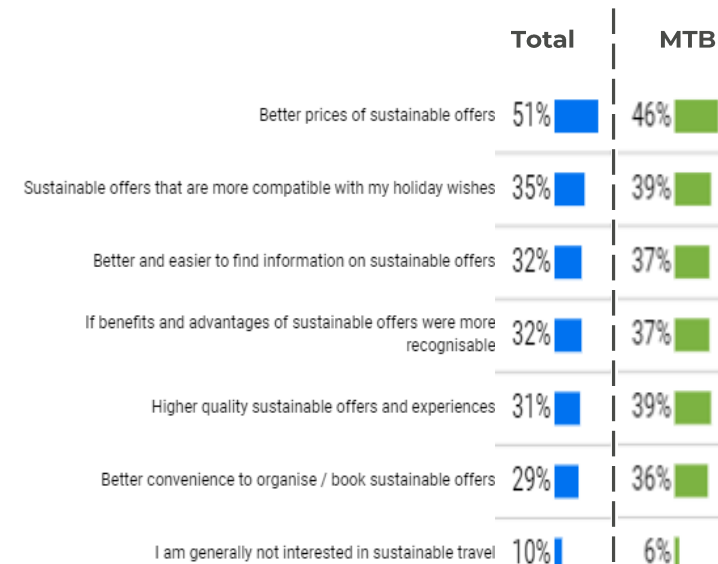
## Importance of sustainability for choice of trip components



## General preference for visiting iconic vs. lesser-known sites



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



(\*) During last outbound holiday trip.



## Your contact

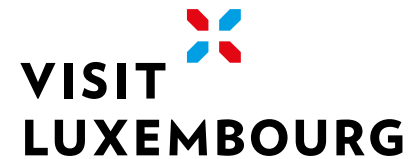


**Alain Krier**

*Head of Insights & Strategy*

T. +352 42 82 82 36

[alain.krier@LfT.lu](mailto:alain.krier@LfT.lu)



**Luxembourg for Tourism GIE**  
6, rue Antoine de Saint-Exupéry  
L-1432 Luxembourg-Kirchberg  
[www.visitluxembourg.com](http://www.visitluxembourg.com)