



Luxembourg for Tourism

Theme profile

CYCLING & MOUNTAINBIKING 2024

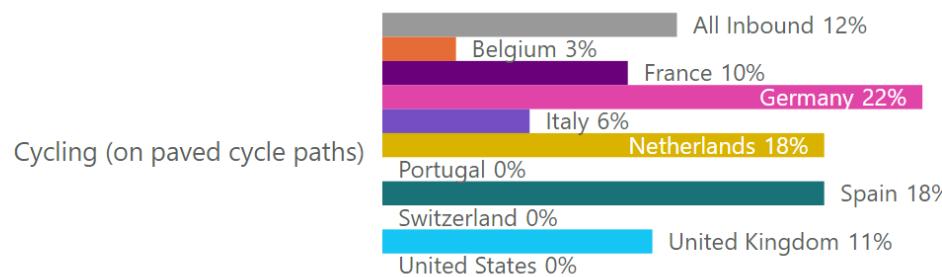


Market size of Cycling & Mountainbiking segments

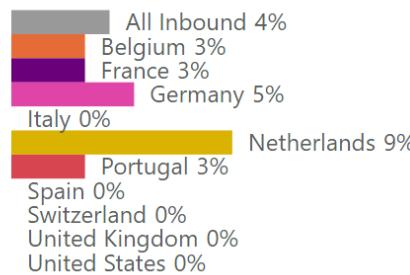
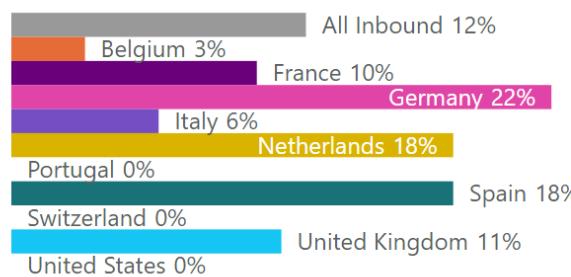
Please note: Due to a small sample size for visitors with mountainbiking as an activity in their holiday, the category is emitted for some visuals. This applies to visitors with overnight as well as same-day visitors. Numbers concerning this group are rather indicative.

Shares by country of origin

Visitors with overnight



Cycling (on paved cycle paths)

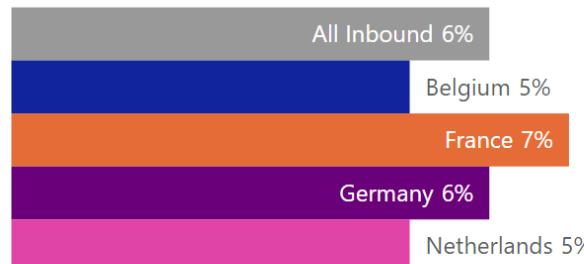


Mountain biking

- Germany as well as the Netherlands and Spain indicate the highest share of visitors with cycling as an activity in their holiday.

Shares by country of origin

Same-day visitors



Cycling (on paved cycle paths)

Number of overnight leisure trips to Luxembourg (estimate, yearly average 2023/2024)

Cycling (holiday activity)

168.000**(12%
of inbound
overnight
leisure trips to
Luxembourg)**

Mountain- biking (holiday activity)

56.000**(4%
of inbound
overnight
leisure trips to
Luxembourg)**

Number of same-day leisure trips to Luxembourg (estimate, yearly average 2023/2024)

Cycling (excurs. activity)

220.000**(6%
of inbound
same-day
leisure trips to
Luxembourg)**

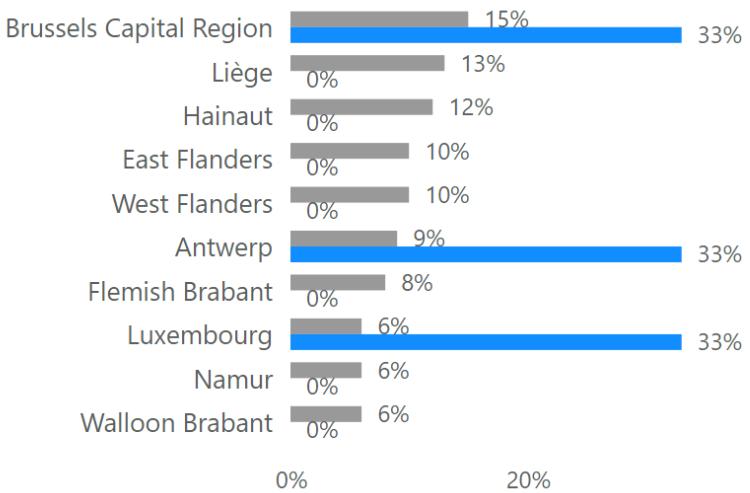
Mountain- biking (excurs. activity)

37.000**(1%
of inbound
same-day
leisure trips to
Luxembourg)**

Region of origin (BE)

Visitors with overnight

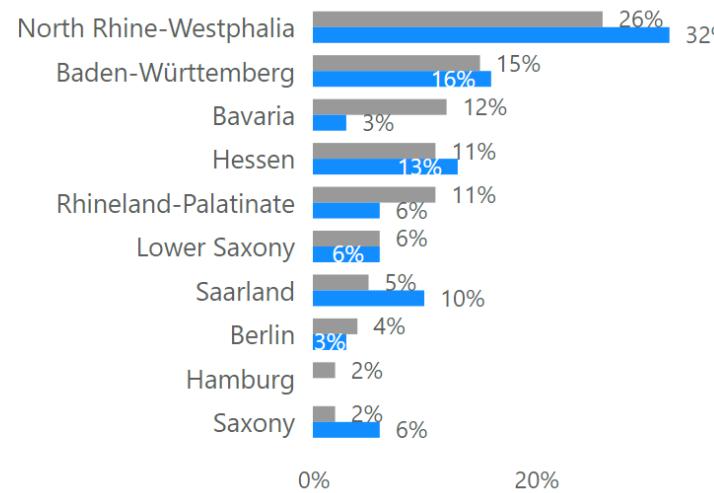
● All Inbound ● Cycling (activity)



Region of origin (DE)

Visitors with overnight

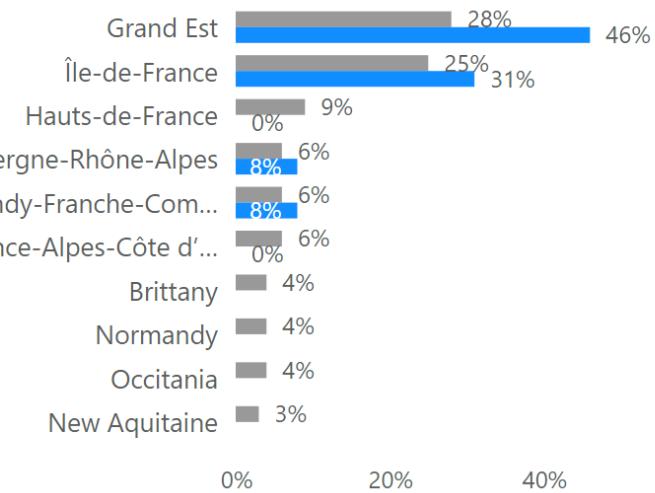
● All Inbound ● Cycling (activity)



Region of origin (FR)

Visitors with overnight

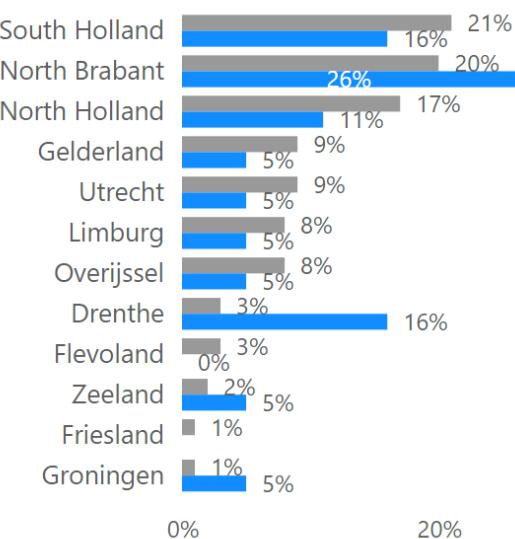
● All Inbound ● Cycling (activity)



Region of origin (NL)

Visitors with overnight

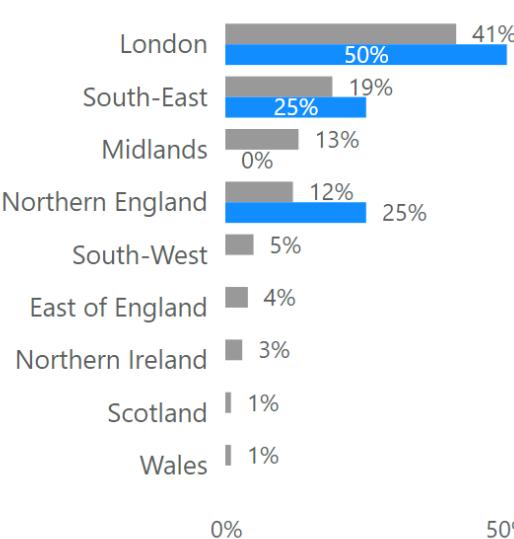
● All Inbound ● Cycling (activity)



Region of origin (UK)

Visitors with overnight

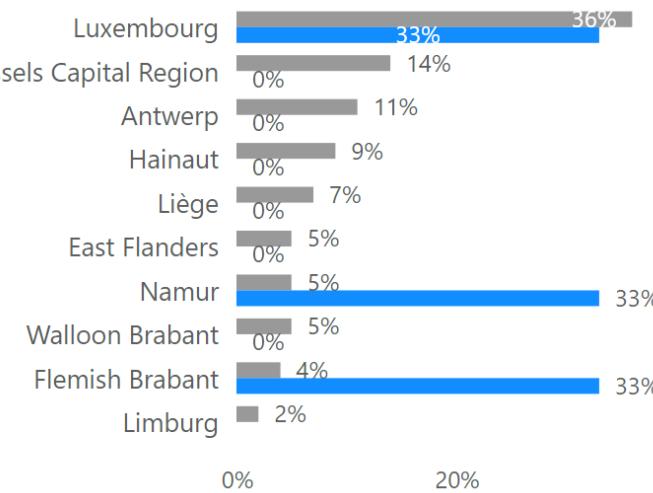
● All Inbound ● Cycling (activity)



Region of origin (BE)

Same-day visitors

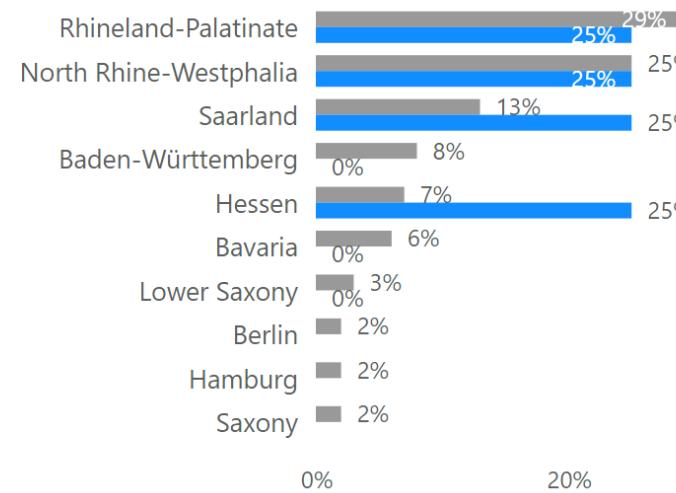
● All Inbound ● Cycling (activity)



Region of origin (DE)

Same-day visitors

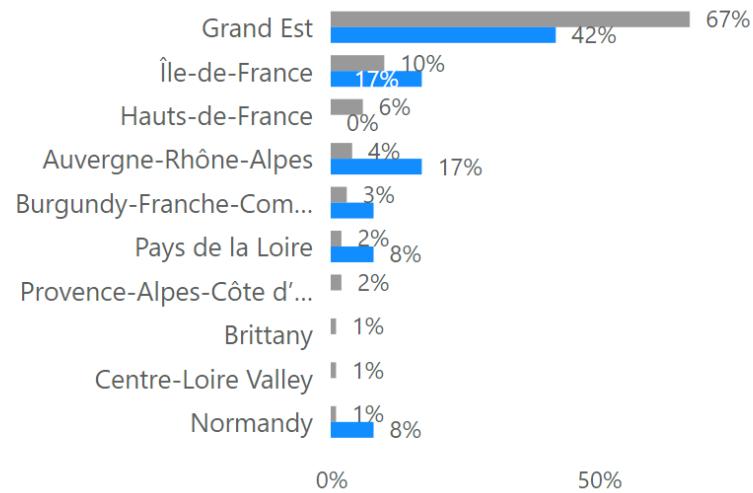
● All Inbound ● Cycling (activity)



Region of origin (FR)

Same-day visitors

● All Inbound ● Cycling (activity)



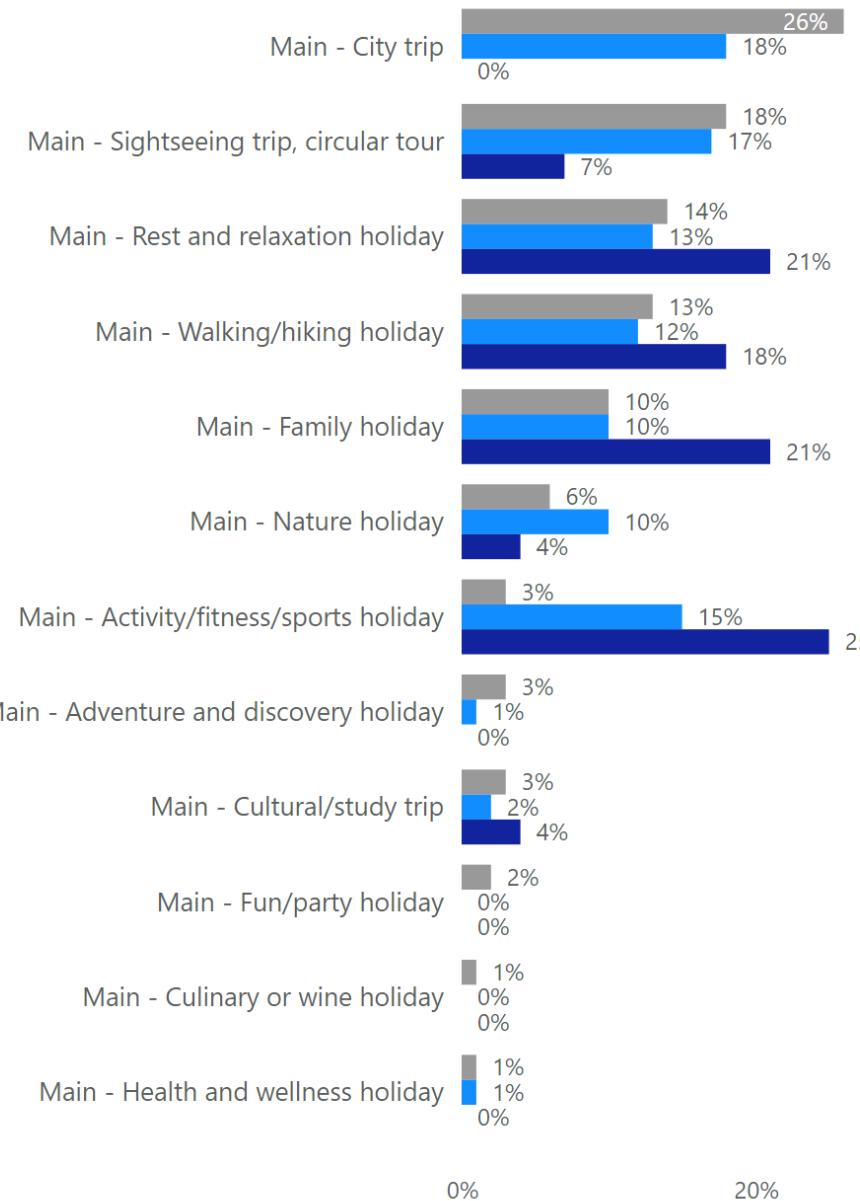


Travel behaviour of leisure visitors in Luxembourg with Cycling & Mountainbiking activities

Main holiday types

Visitors with overnight

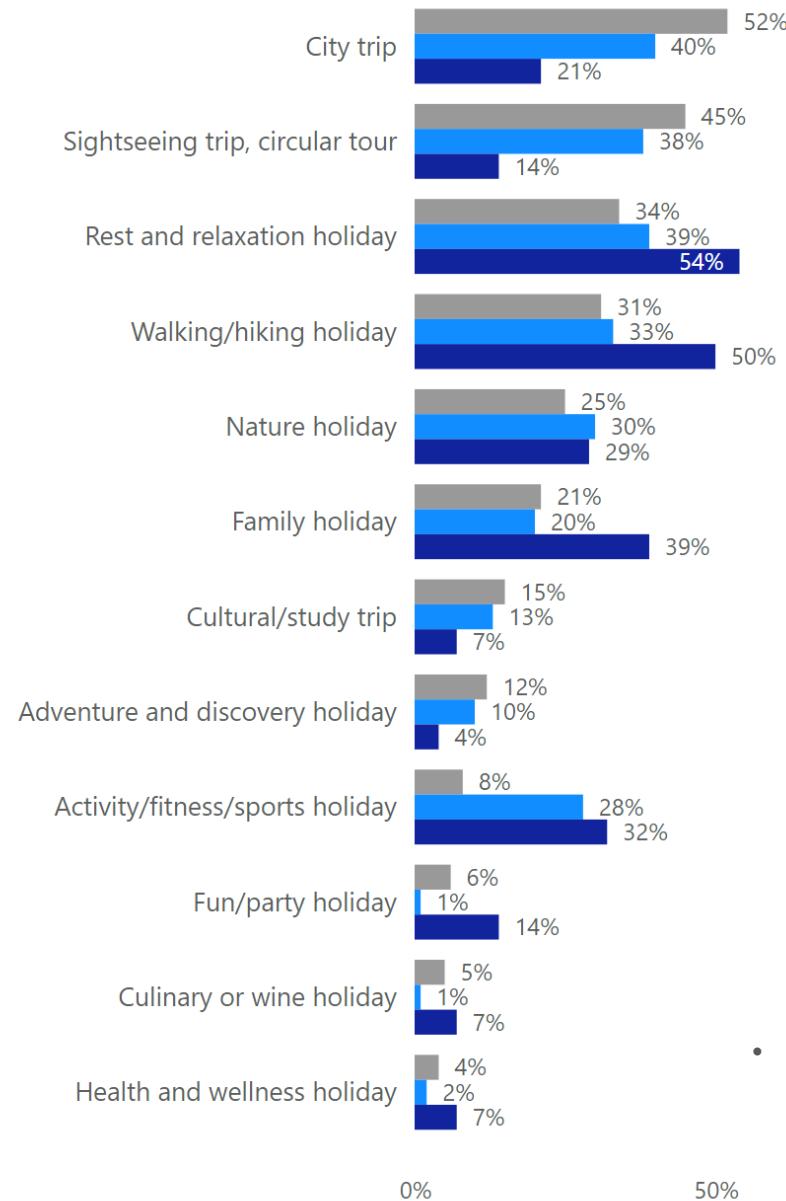
● All Inbound ● Cycling (activity) ● MTB (activity)



All holiday types

Visitors with overnight

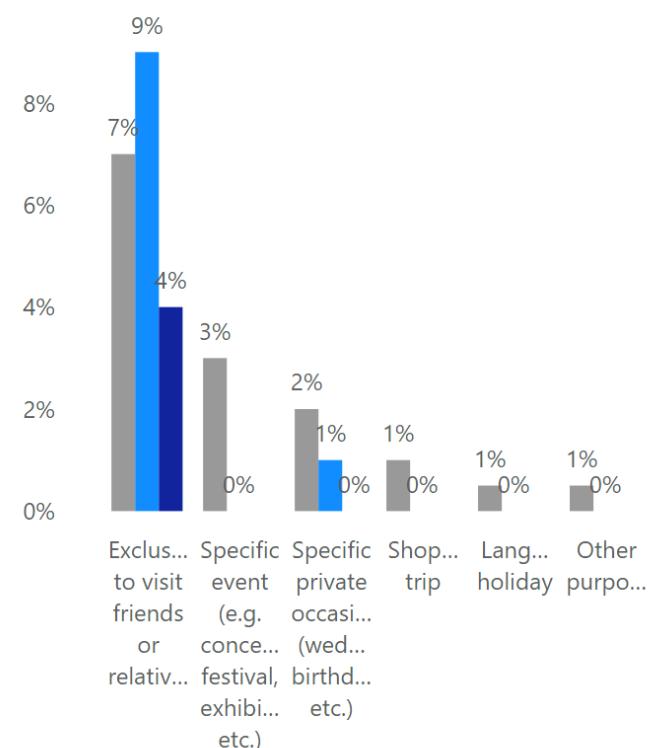
● All Inbound ● Cycling (activity) ● MTB (activity)



Main purpose of overnight trip

(if not holiday)

● All Inbound ● Cycling (activity) ● MTB (activity)

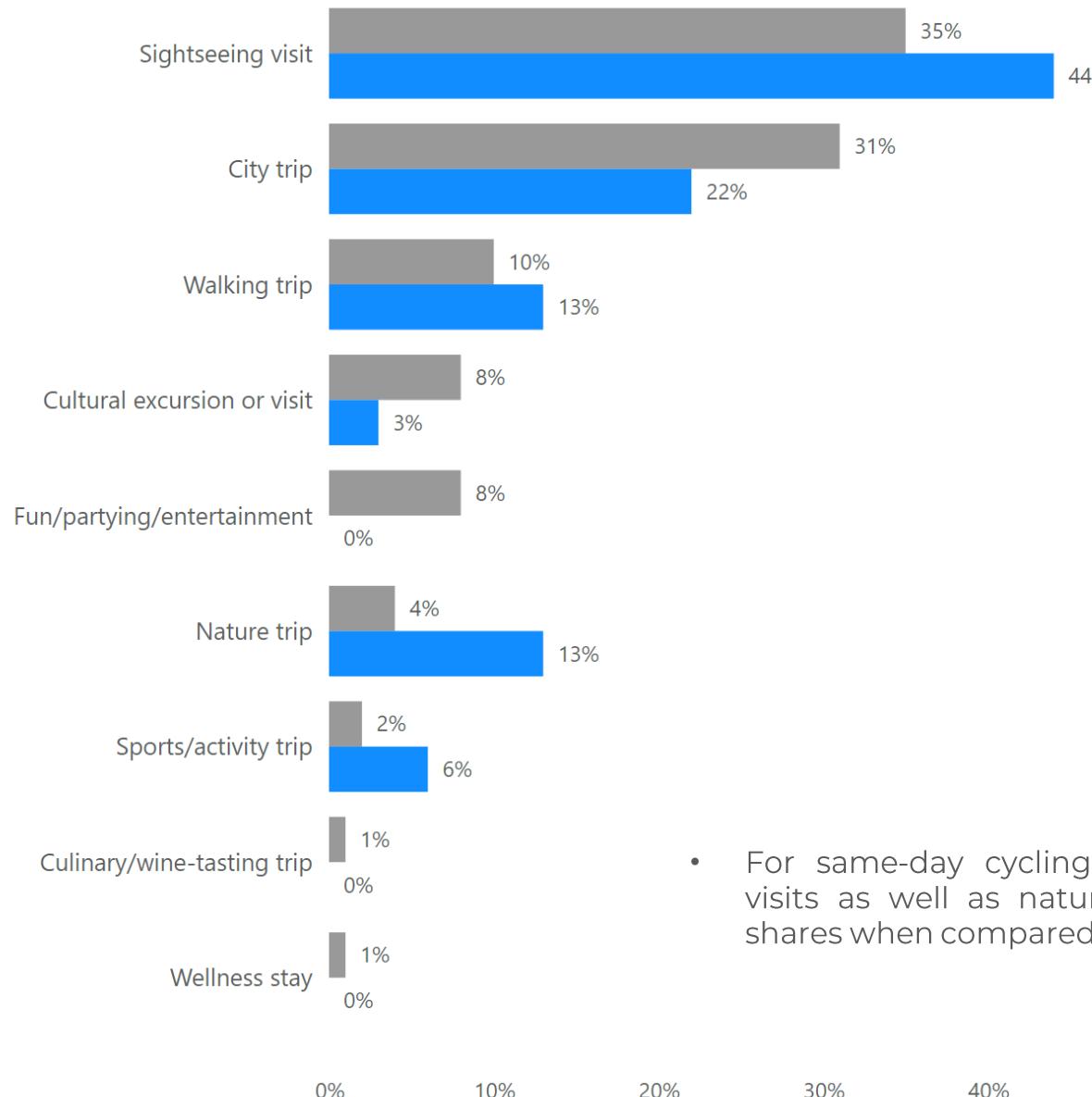


- Cycling and mountainbiking activities are especially often included in nature, family and active/sports holidays.

Type of excursion

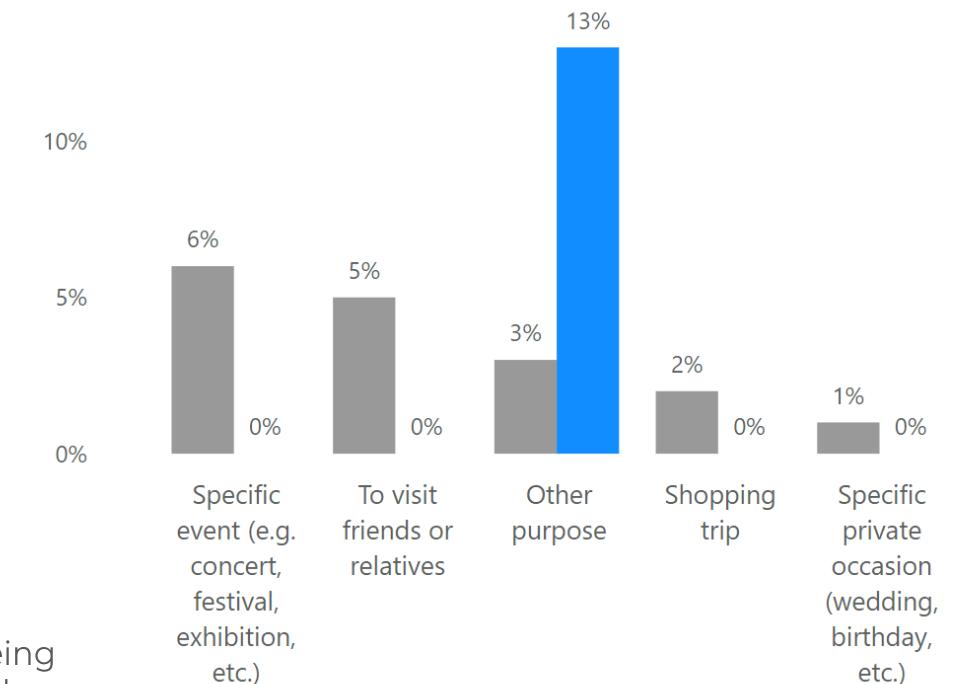
Same-day visitors

● All Inbound ● Cycling (activity)



Main purpose of excursion (if not day trip)

● All Inbound ● Cycling (activity)

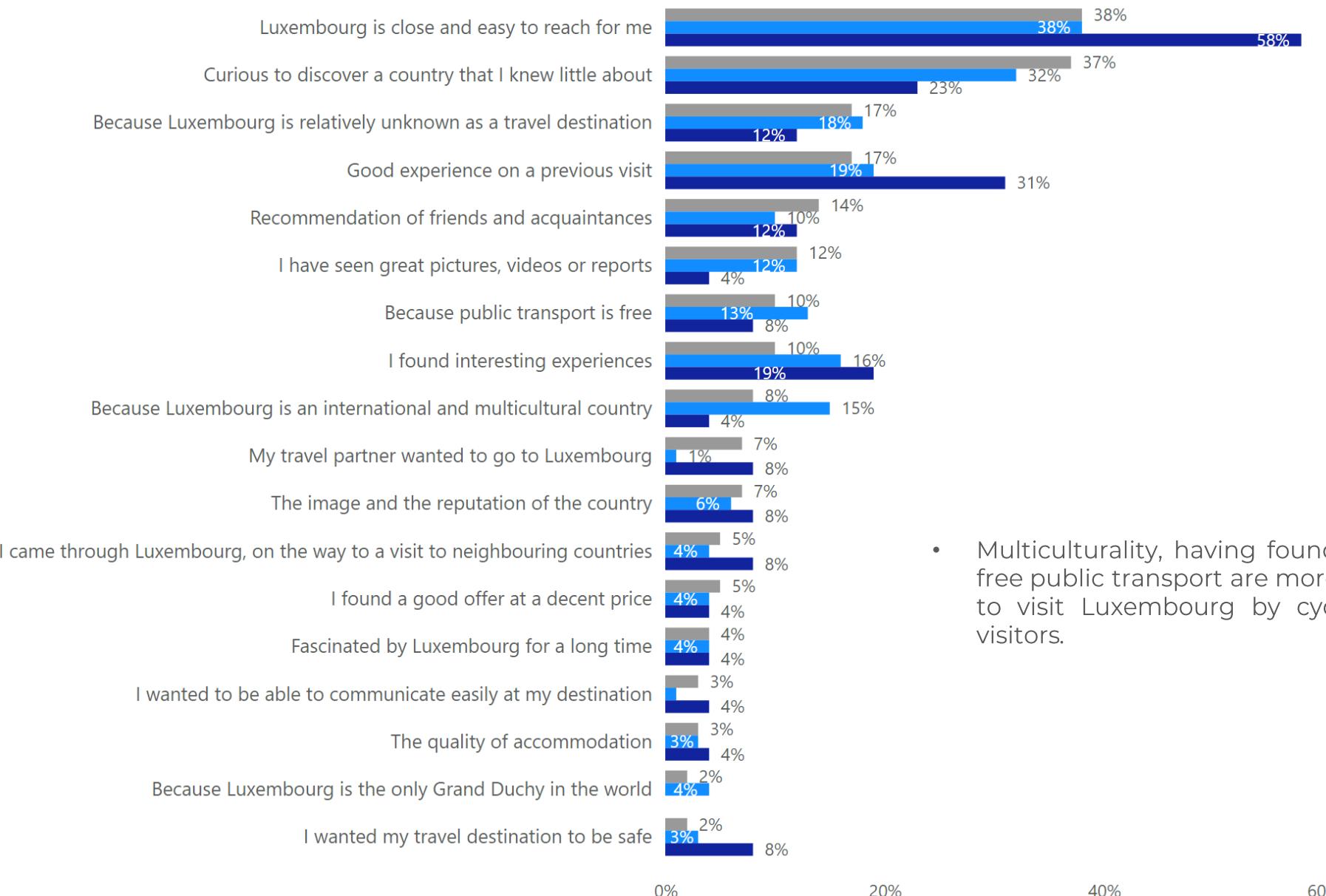


- For same-day cycling visitors, sightseeing visits as well as nature trips show higher shares when compared to overall visitors.

Reasons for choosing Luxembourg

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

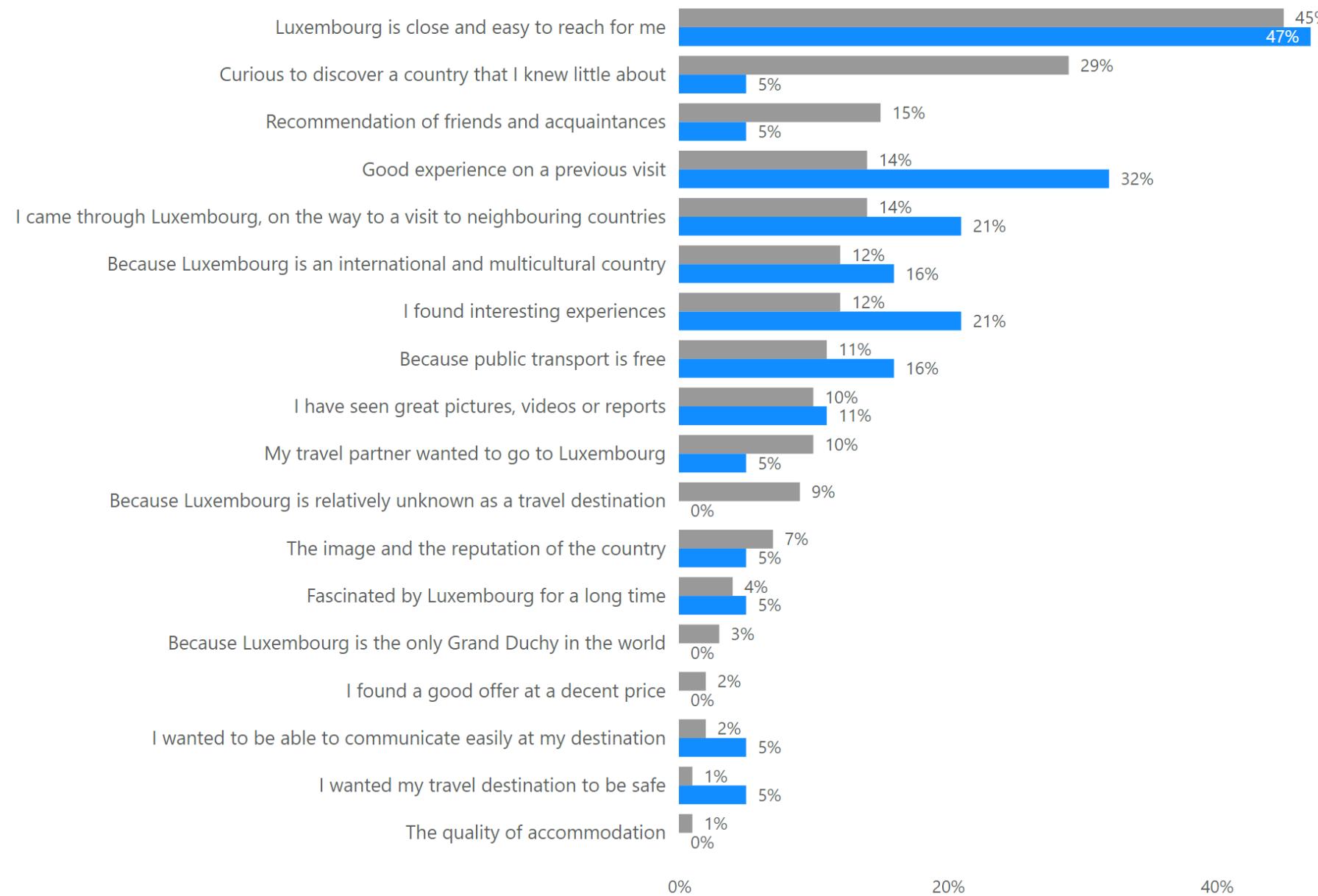


- Multiculturalism, having found interesting experiences and free public transport are more often mentioned as a reason to visit Luxembourg by cycling visitors than by overall visitors.

Reasons for choosing Luxembourg

Same-day visitors

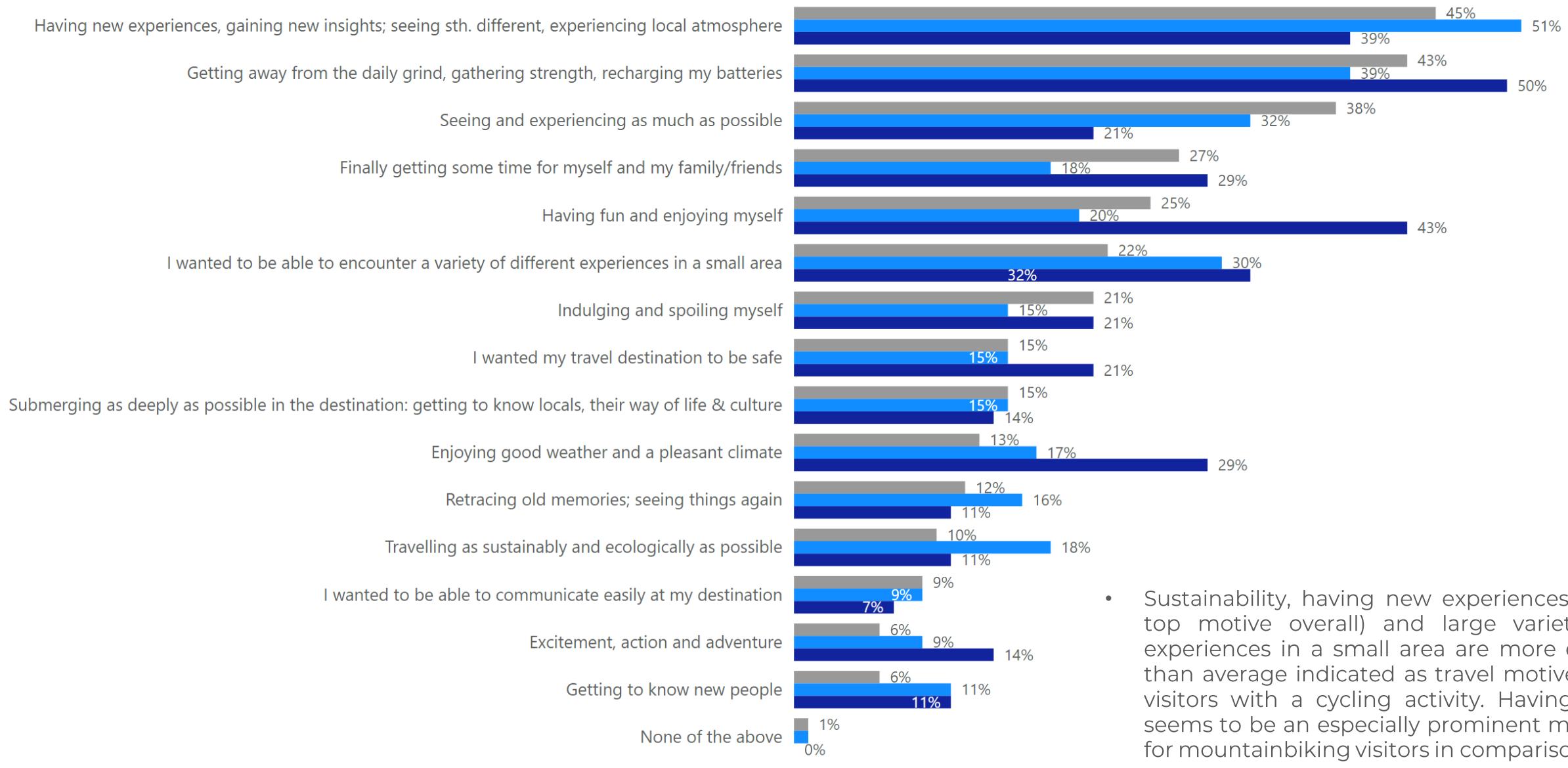
● All Inbound ● Cycling (activity)



Travel motives

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

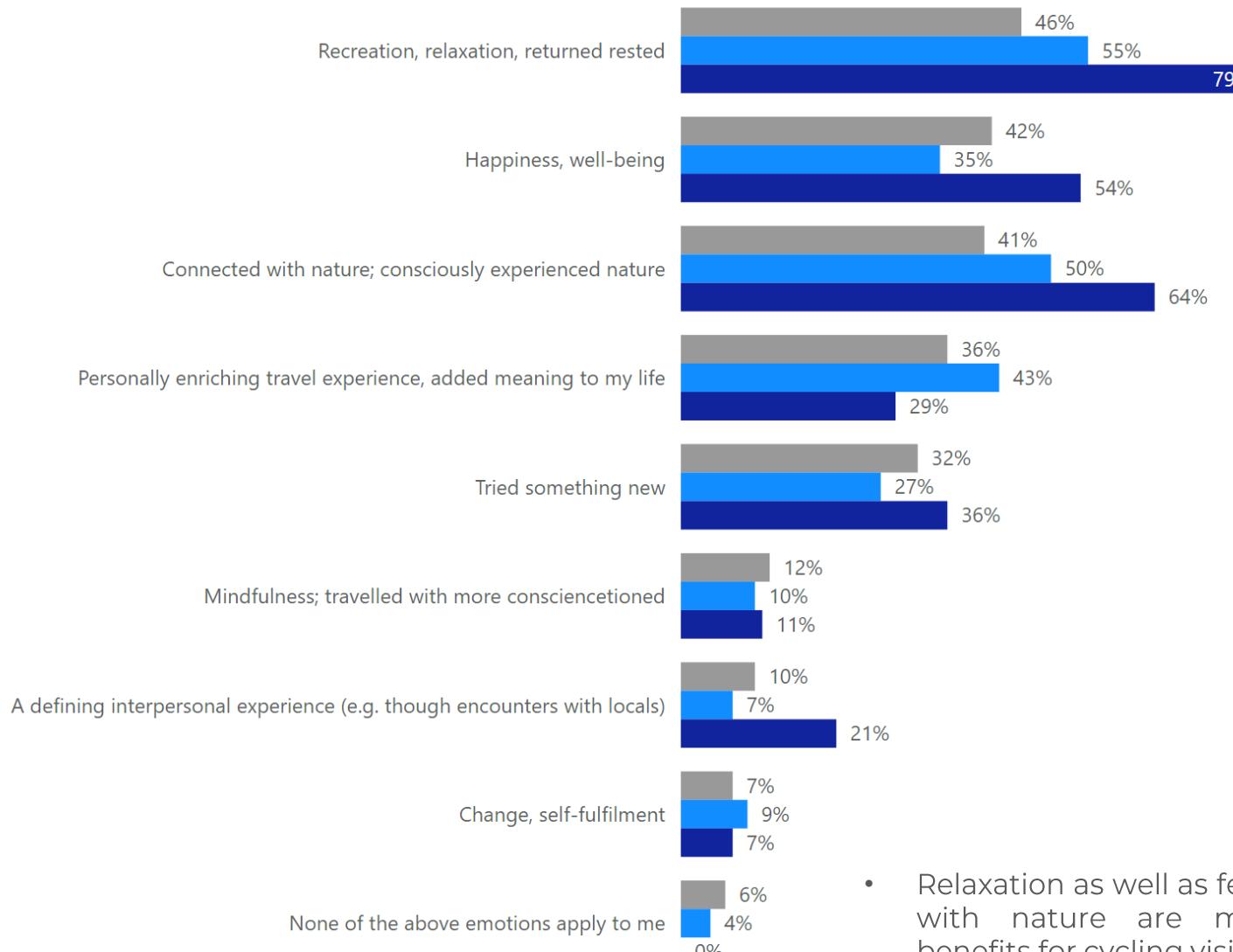


- Sustainability, having new experiences (the top motive overall) and large variety of experiences in a small area are more often than average indicated as travel motives by visitors with a cycling activity. Having fun seems to be an especially prominent motive for mountainbiking visitors in comparison.

Emotional benefits experienced during stay

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

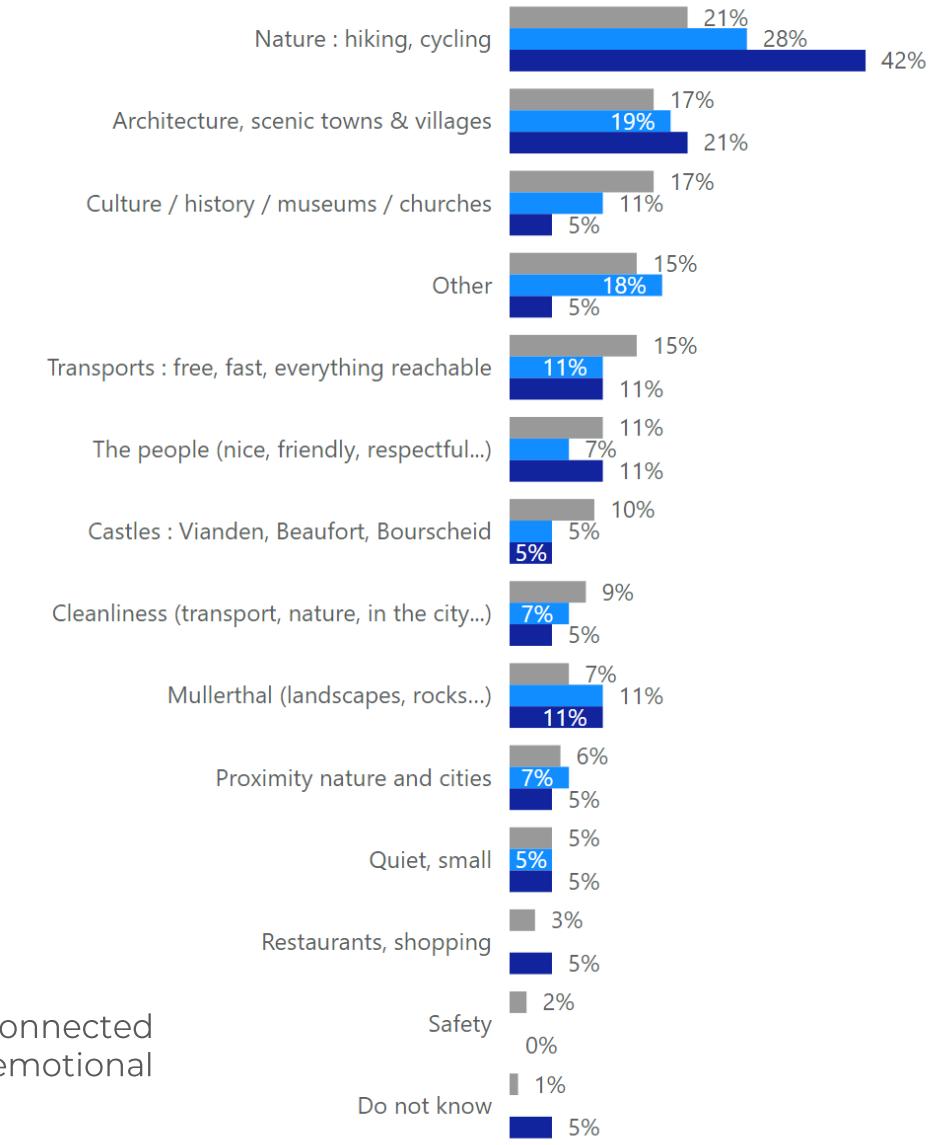


- Relaxation as well as feeling connected with nature are major emotional benefits for cycling visitors.

Particularly positive experience during stay (open question)

Visitors with overnight

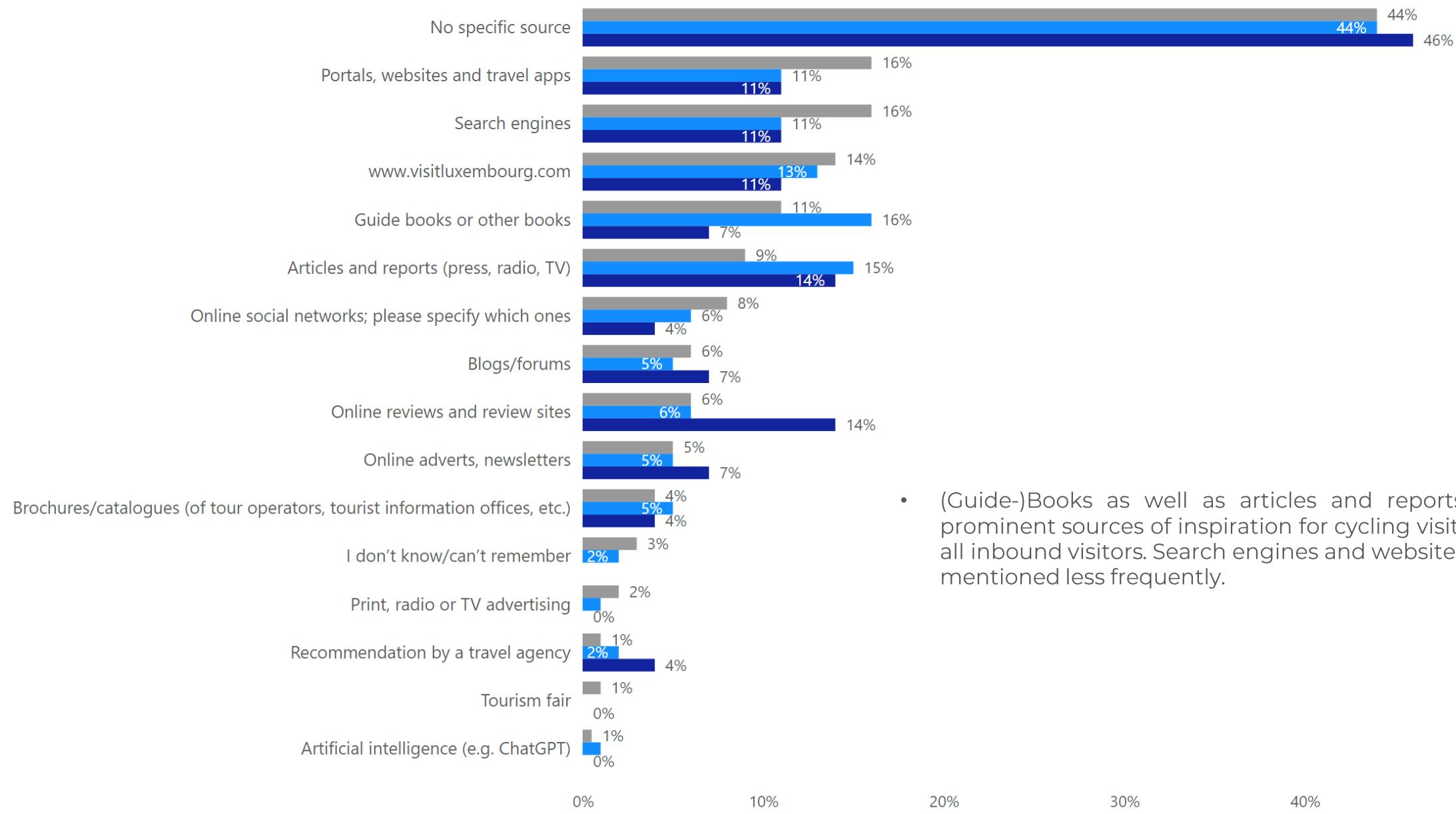
● All Inbound ● Cycling (activity) ● MTB (activity)



Inspiration sources

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

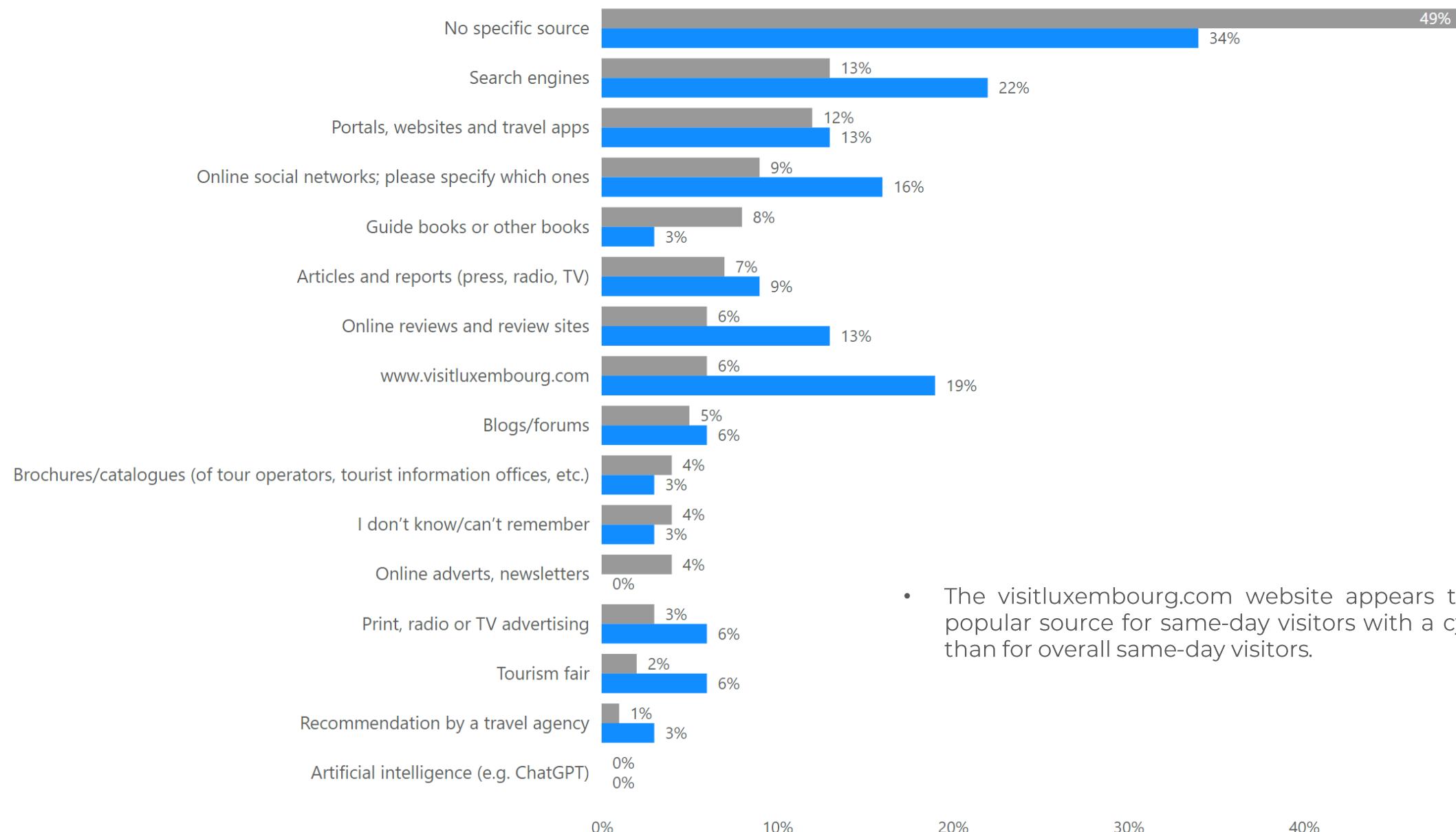


- (Guide-)Books as well as articles and reports are more prominent sources of inspiration for cycling visitors than for all inbound visitors. Search engines and websites have been mentioned less frequently.

Inspiration sources

Same-day visitors

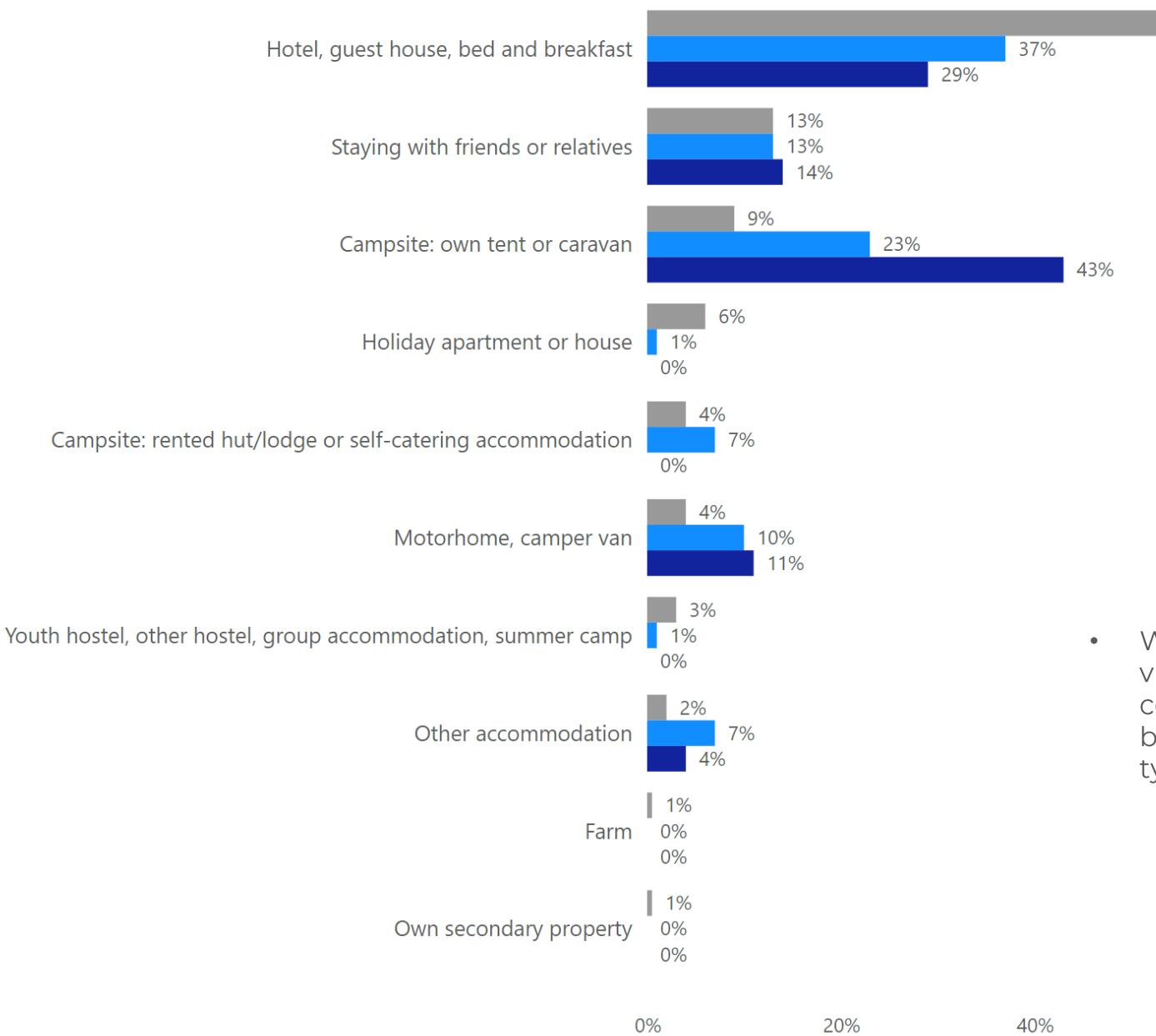
● All Inbound ● Cycling (activity)



- The [visitluxembourg.com](http://www.visitluxembourg.com) website appears to be a more popular source for same-day visitors with a cycling activity than for overall same-day visitors.

Type of accommodation

● All Inbound ● Cycling (activity) ● MTB (activity)

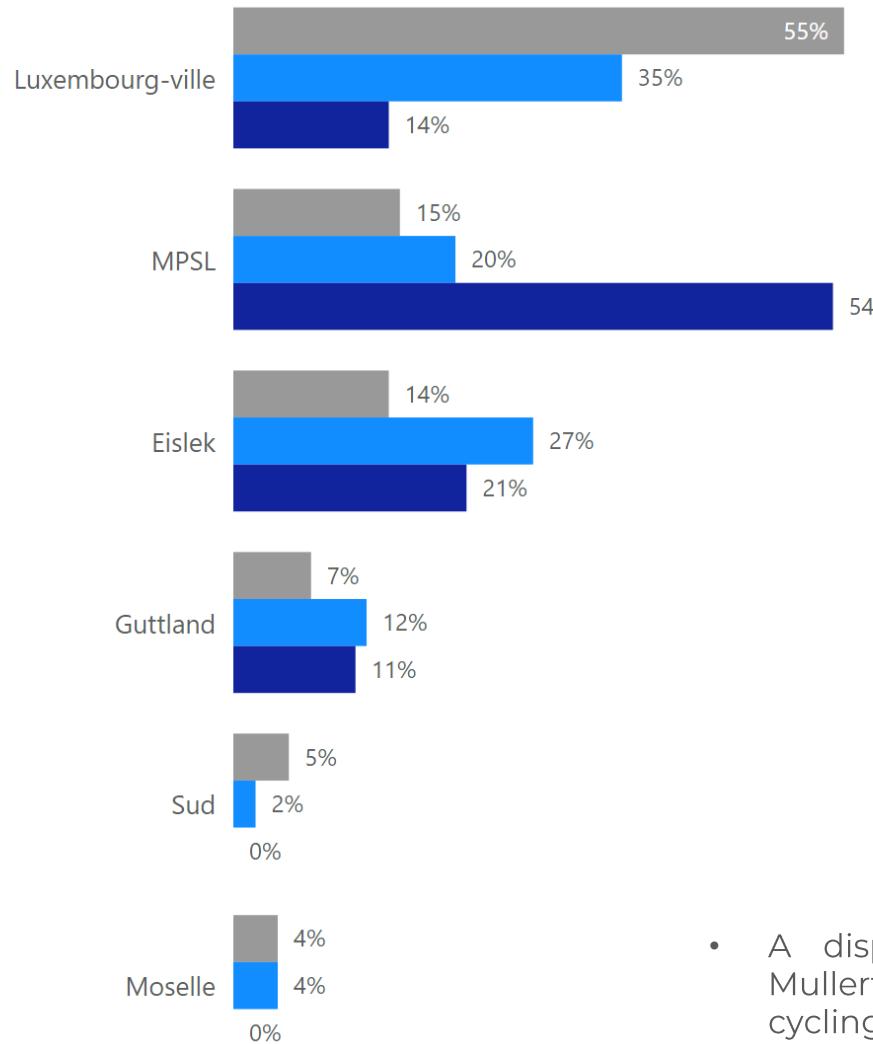


- When comparing visitors with a cycling activity to overall visitors, campsites are more often, and hotels are considerably less often chosen as type of accommodation, but the latter nevertheless remain the top accommodation type for cycling visitors as well.

Destination region

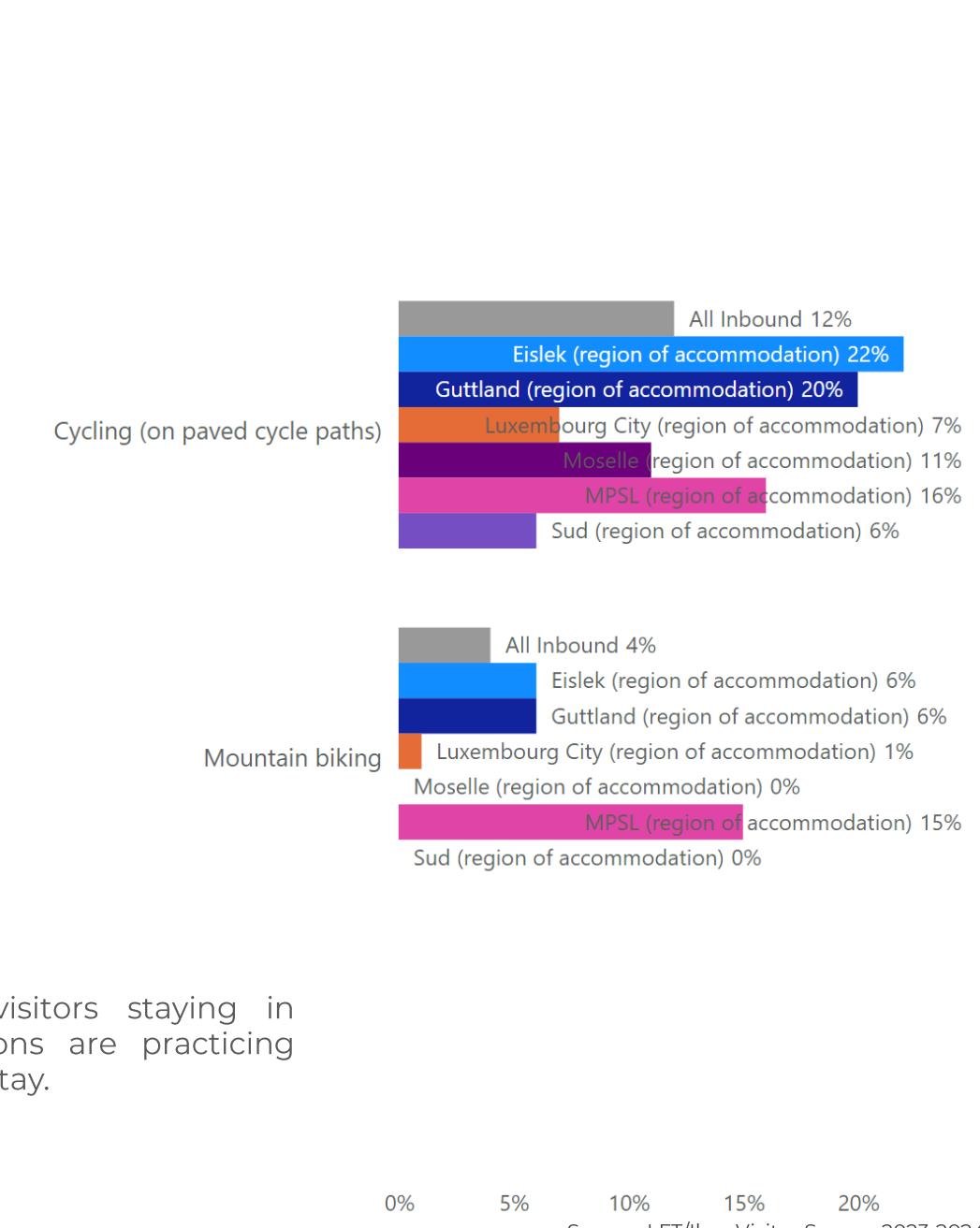
Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)



Shares by destination region

Visitors with overnight



- A disproportionately high share of visitors staying in Mullerthal, Eislek and Gutland regions are practicing cycling or mountainbiking during their stay.

0% 20% 40% 60%

0% 5% 10% 15% 20%

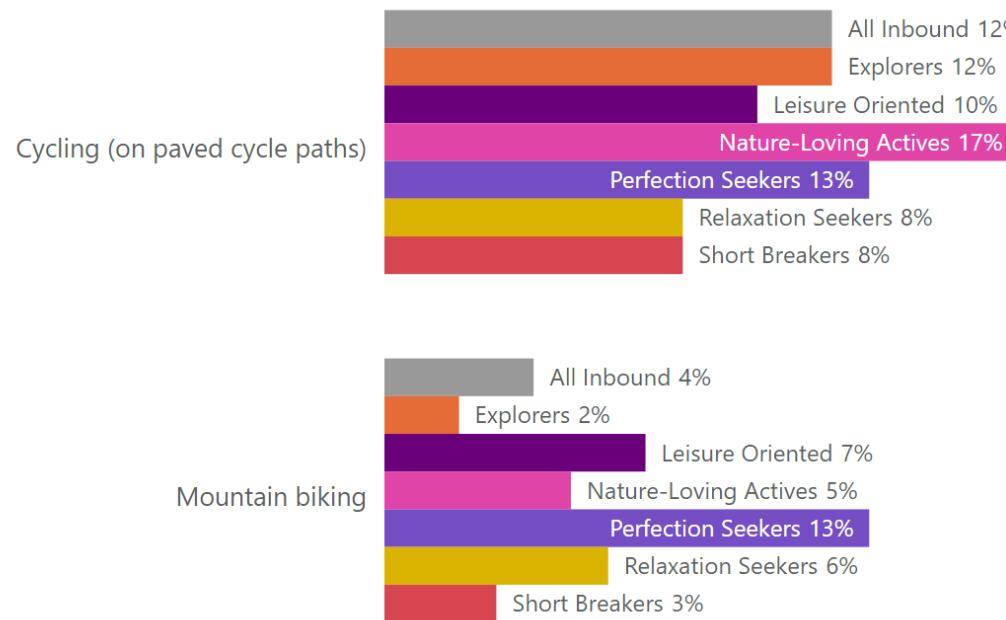
Source: LFT/Iires Visitor Survey, 2023-2024.

Shares by target segments

Visitors with overnight

Shares by target segments

Same-day visitors



- Nature-Loving Actives (esp for cycling) and Perfection Seekers (esp for mountainbiking) are particularly keen on these holiday activities during their stay in Luxembourg.

0% 5% 10% 15%

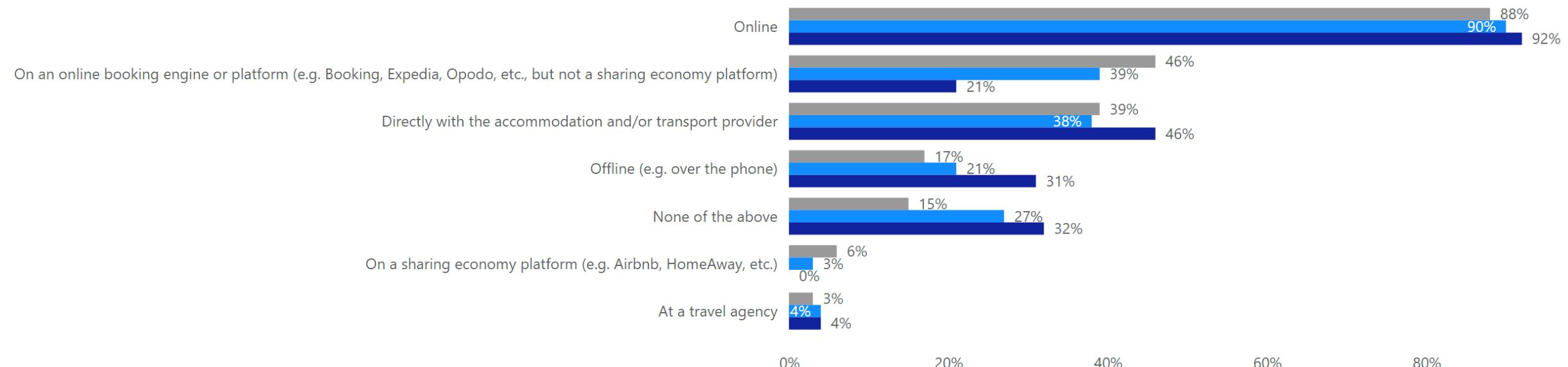
0% 5% 10%

Source: LFT/Igres Visitor Survey, 2023-2024.

Booking channels

Visitors with overnight

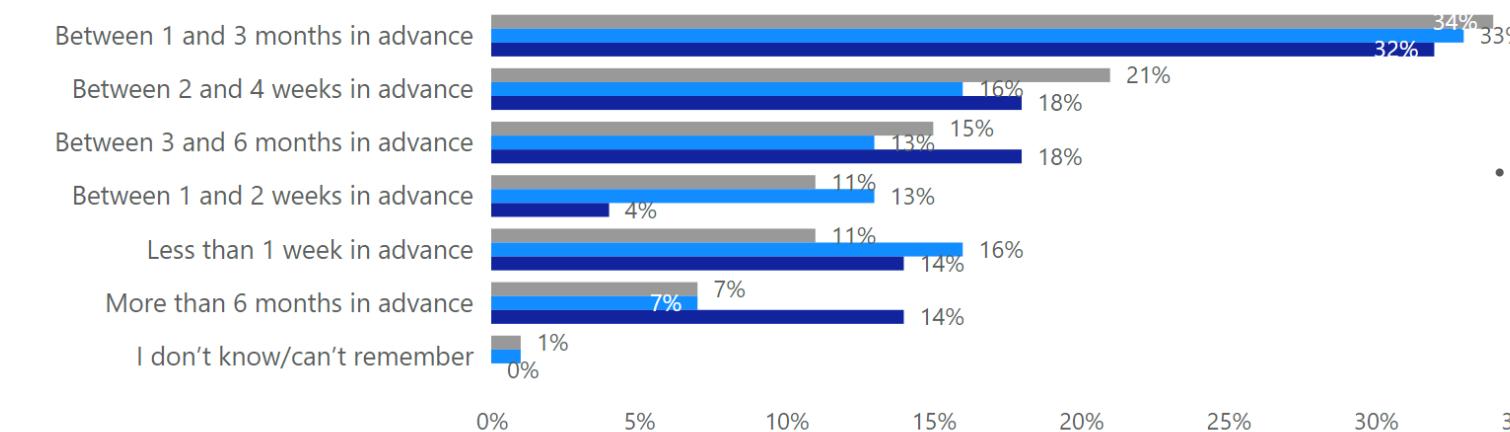
● All Inbound ● Cycling (activity) ● MTB (activity)



Decision moment

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

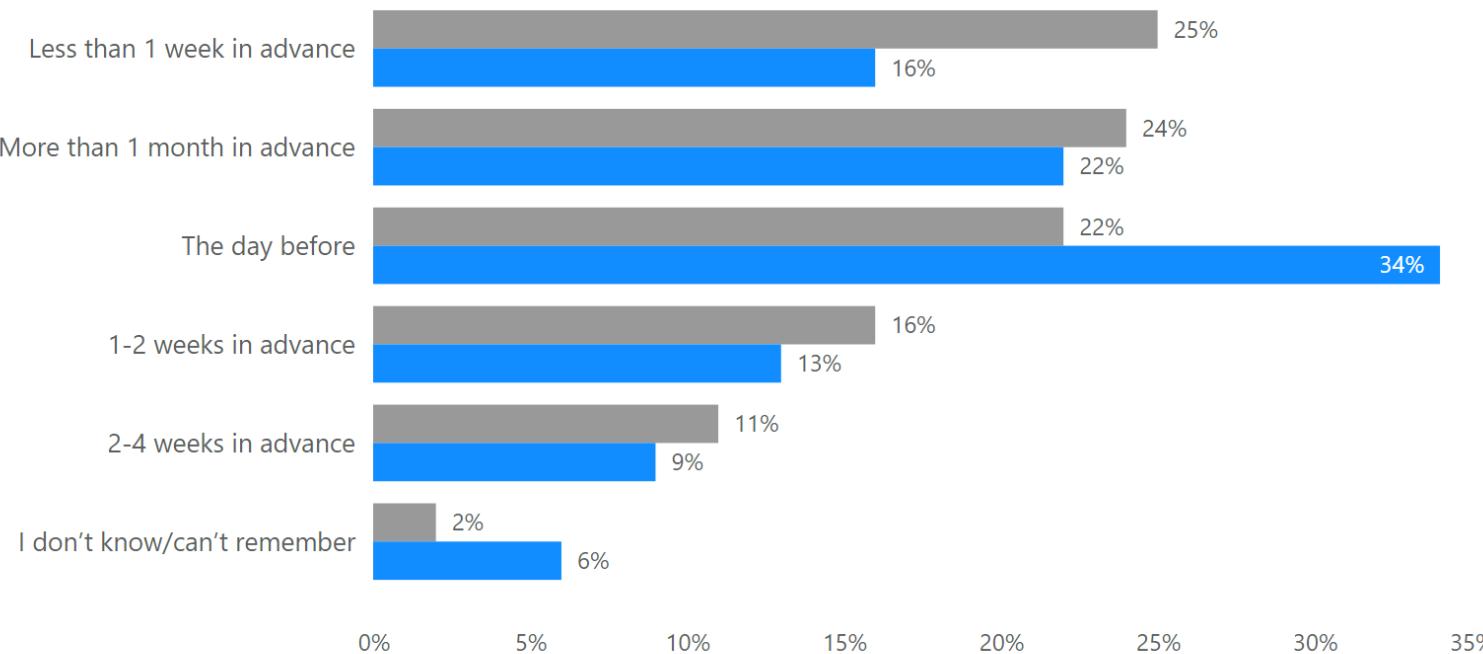


- Visitors with a cycling activity do not differ much from overall visitors regarding their booking channels, beside using an online booking platform a little less often. Their decision moments are also rather similar to all inbound visitors, with lead times between 1 and 3 month most prominent.

Decision moment

Same-day visitors

● All Inbound ● Cycling (activity)

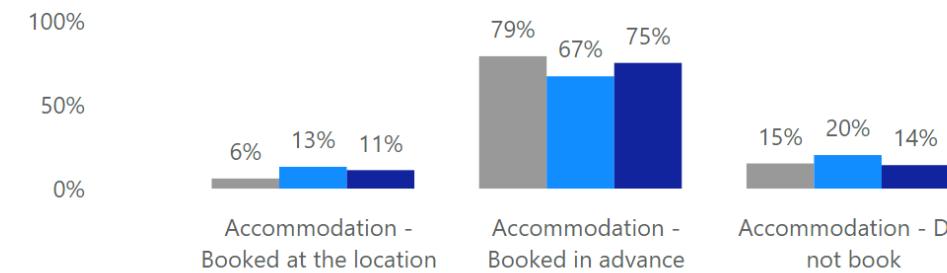


- Deciding the day before seems to be the favoured decision moment by same-day visitors with a cycling activity.

Booking of travel items

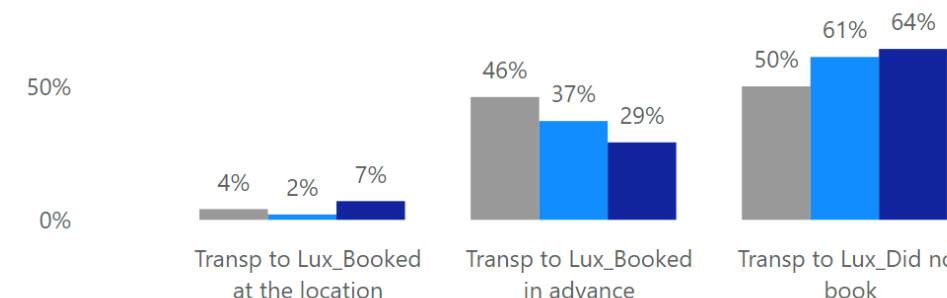
Accommodation

Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)



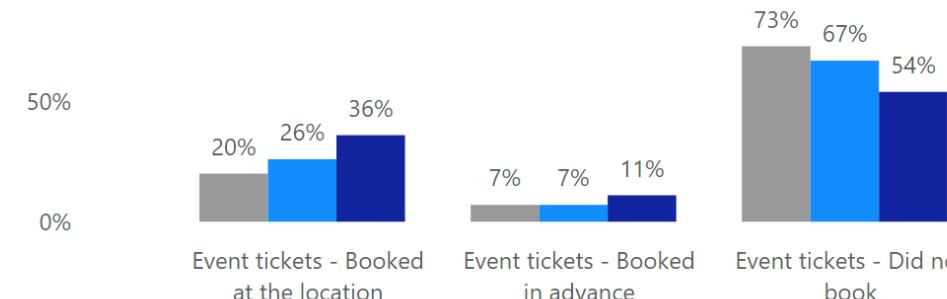
Transport to Luxembourg

Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)



Event tickets

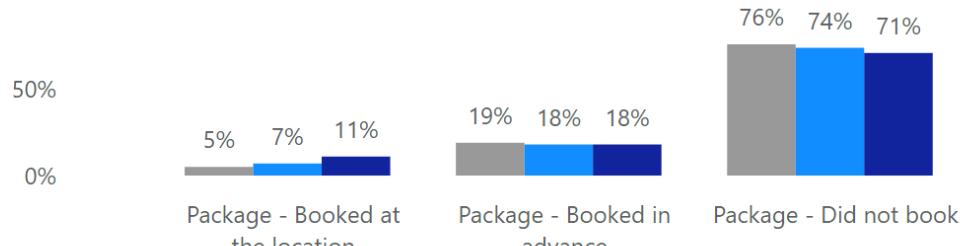
Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)



Booking of travel items

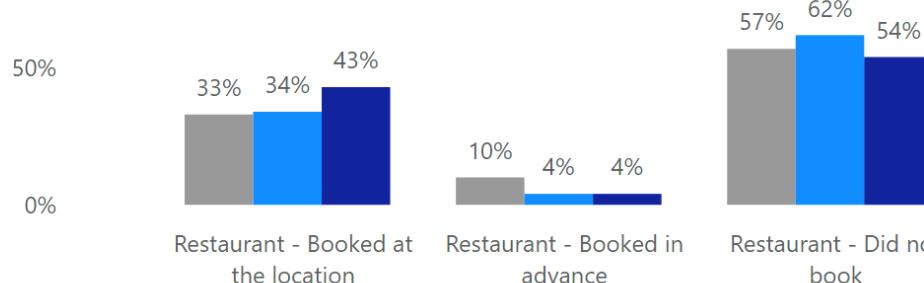
Package

Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)



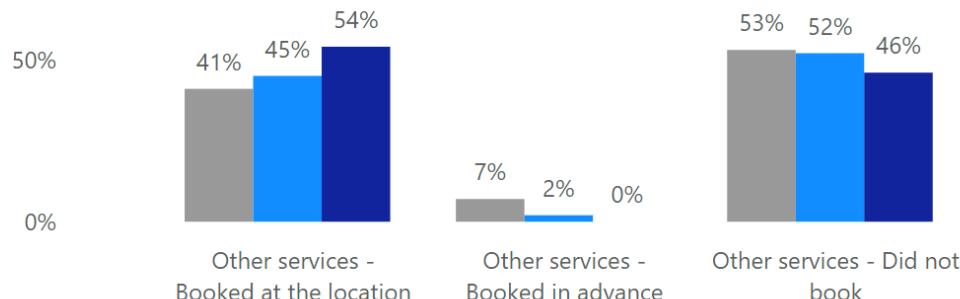
Restaurant

Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)



Other services

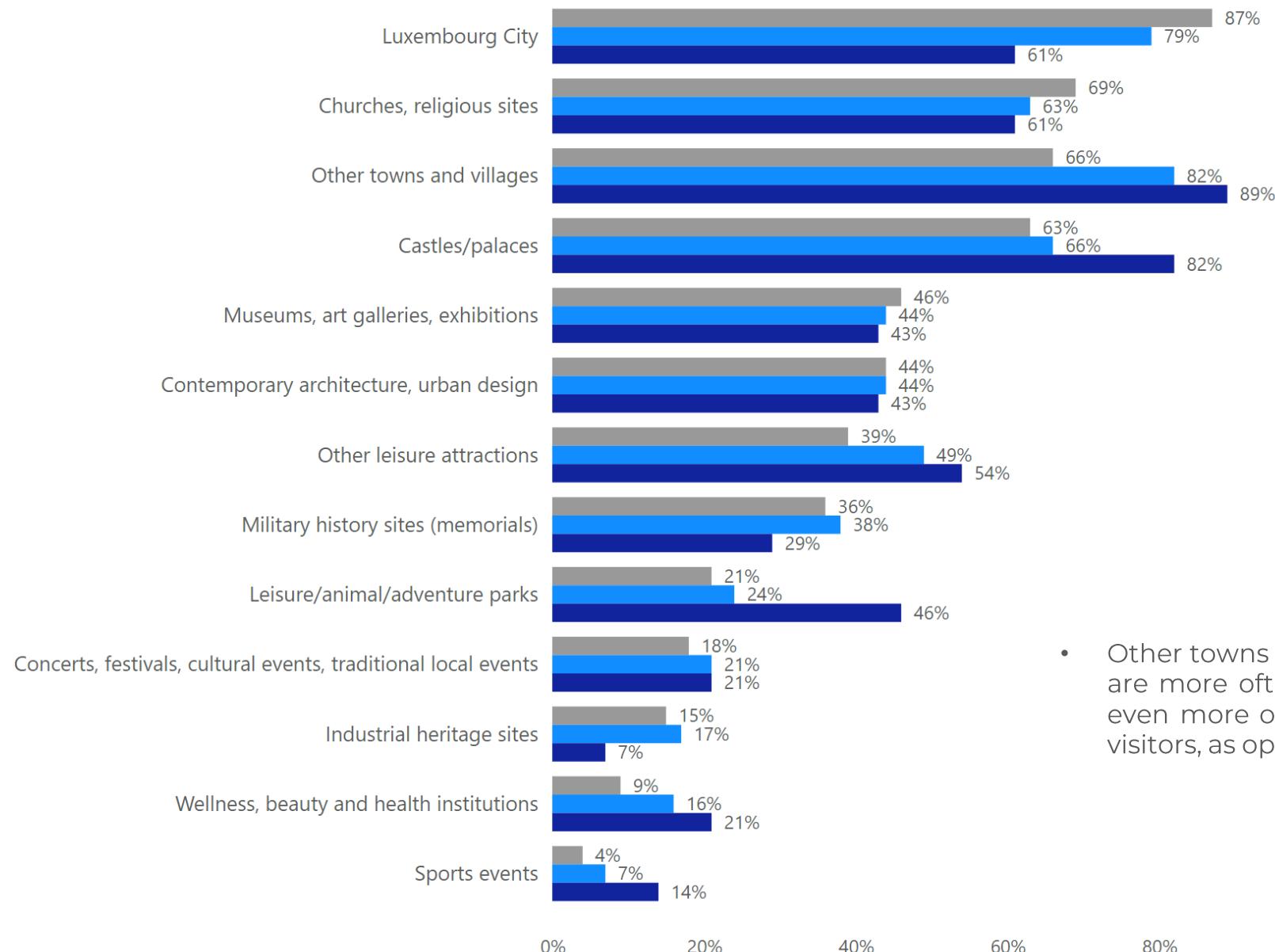
Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)



Places visited

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

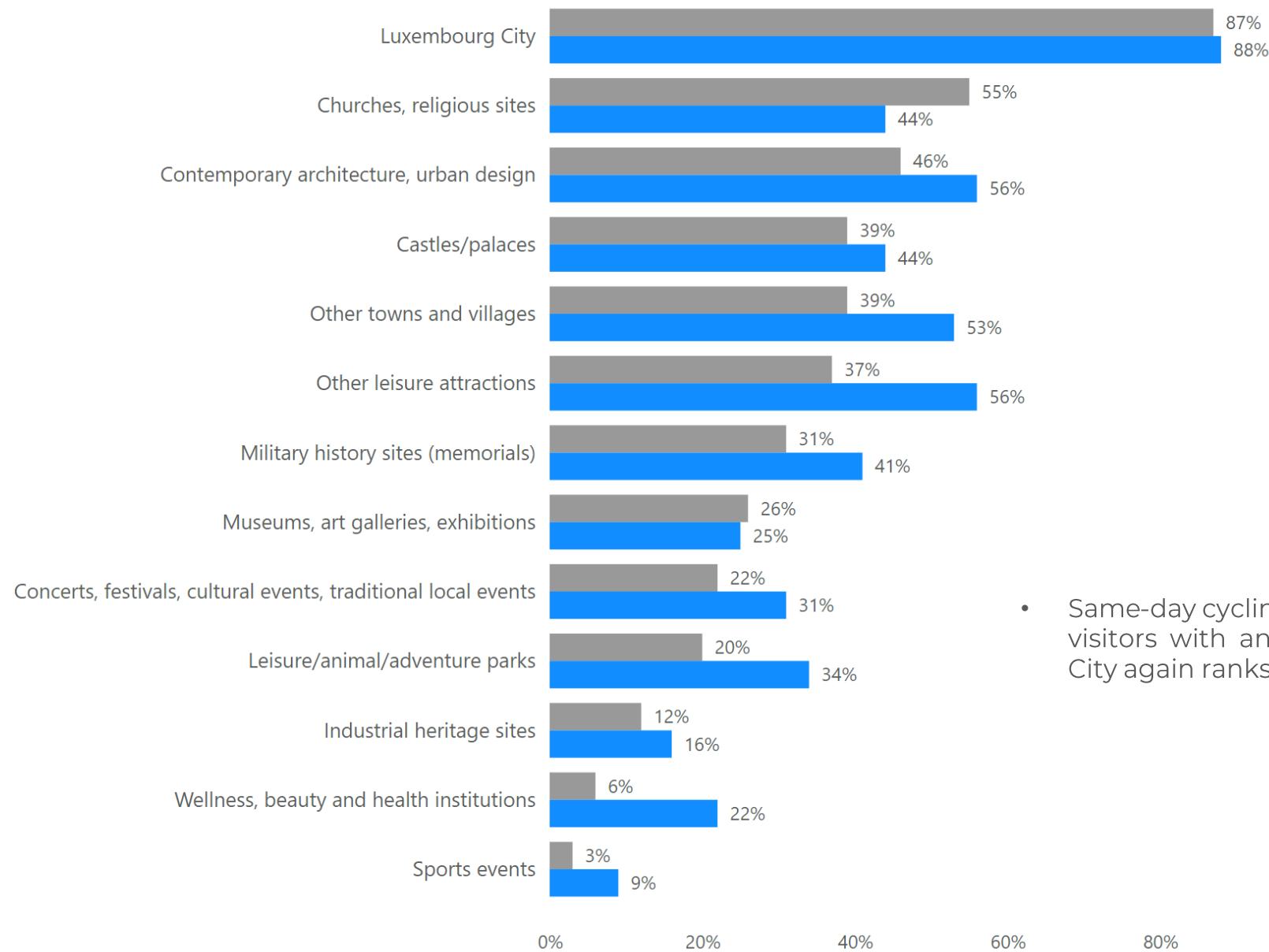


- Other towns and villages as well as other leisure attractions are more often visited by cycling visitors. Other towns are even more often visited than Luxembourg City by cycling visitors, as opposed to all visitors in general.

Places visited

Same-day visitors

● All Inbound ● Cycling (activity)

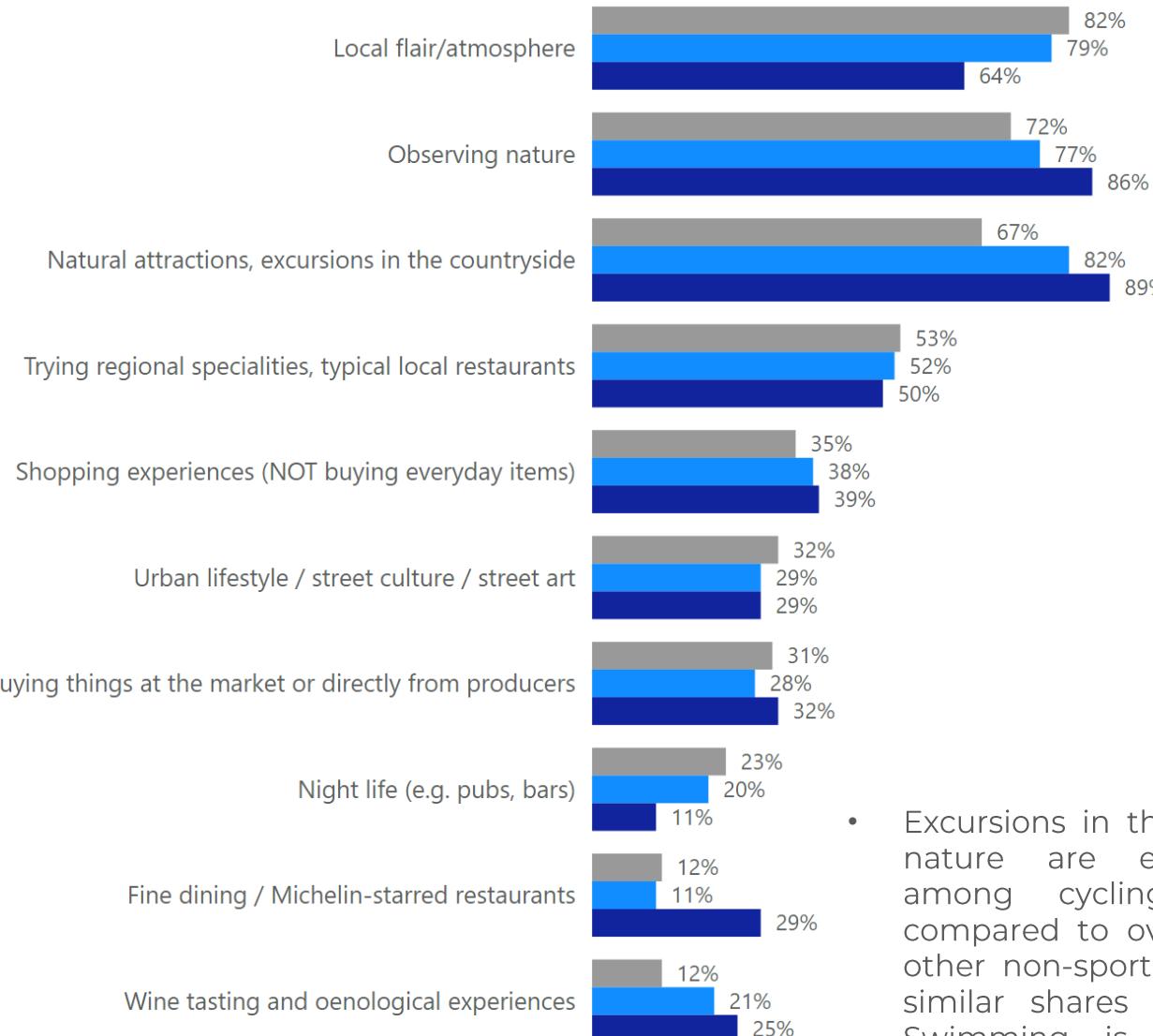


- Same-day cycling visitors show similar patterns than cycling visitors with an overnight, but here, visiting Luxembourg City again ranks first, in line with overall day visitors.

Non-sporting activities

Visitors with overnight

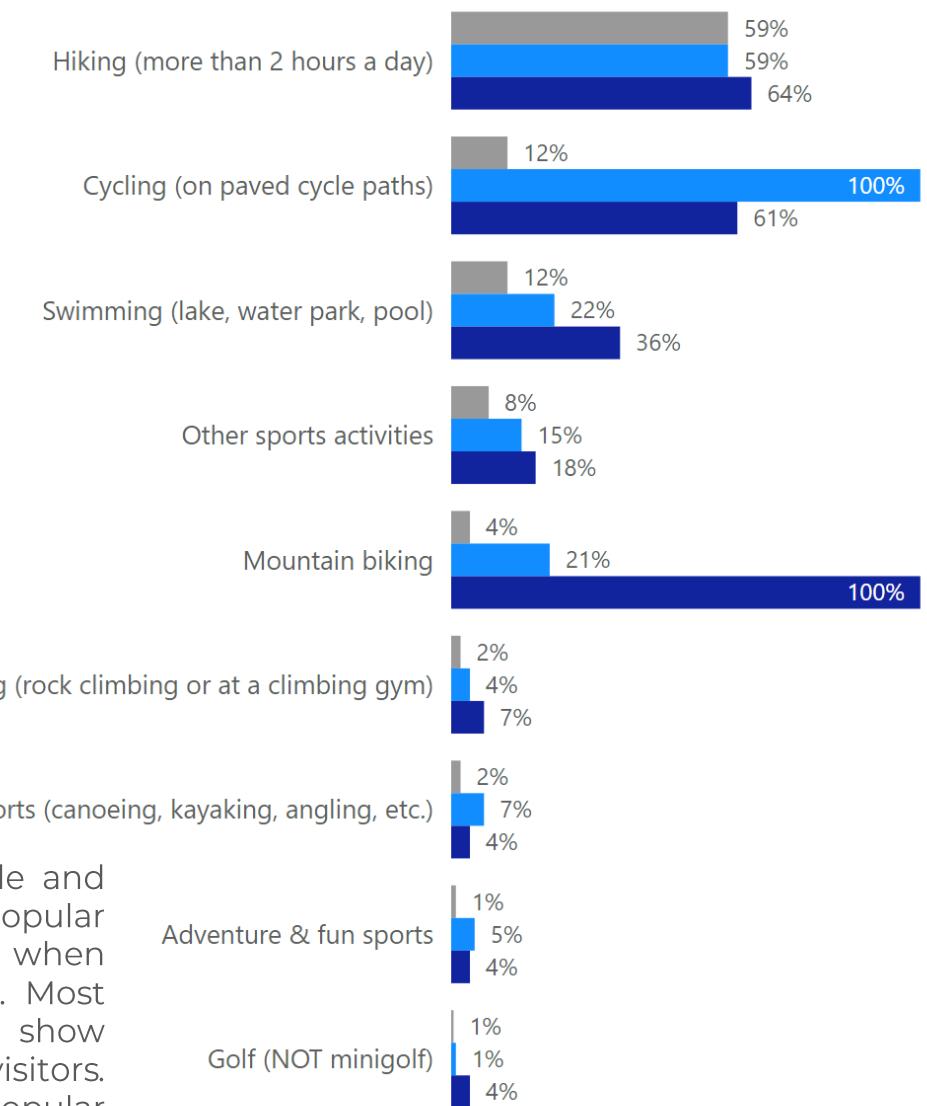
● All Inbound ● Cycling (activity) ● MTB (activity)



Sporting activities

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

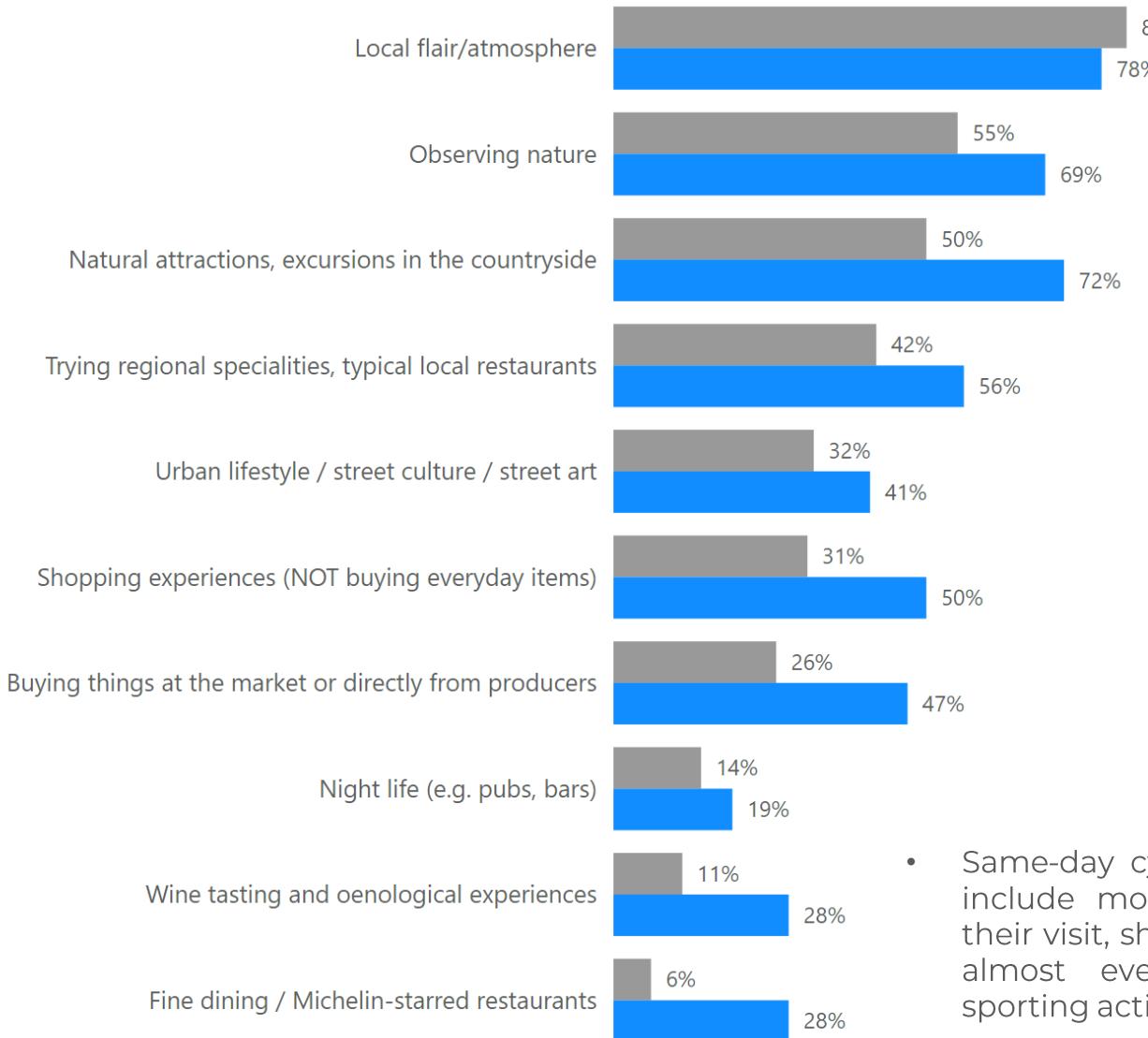


- Excursions in the countryside and nature are especially popular among cycling visitors when compared to overall visitors. Most other non-sporting activities show similar shares to overall visitors. Swimming is a more popular sporting activity.

Non-sporting activities

Same-day visitors

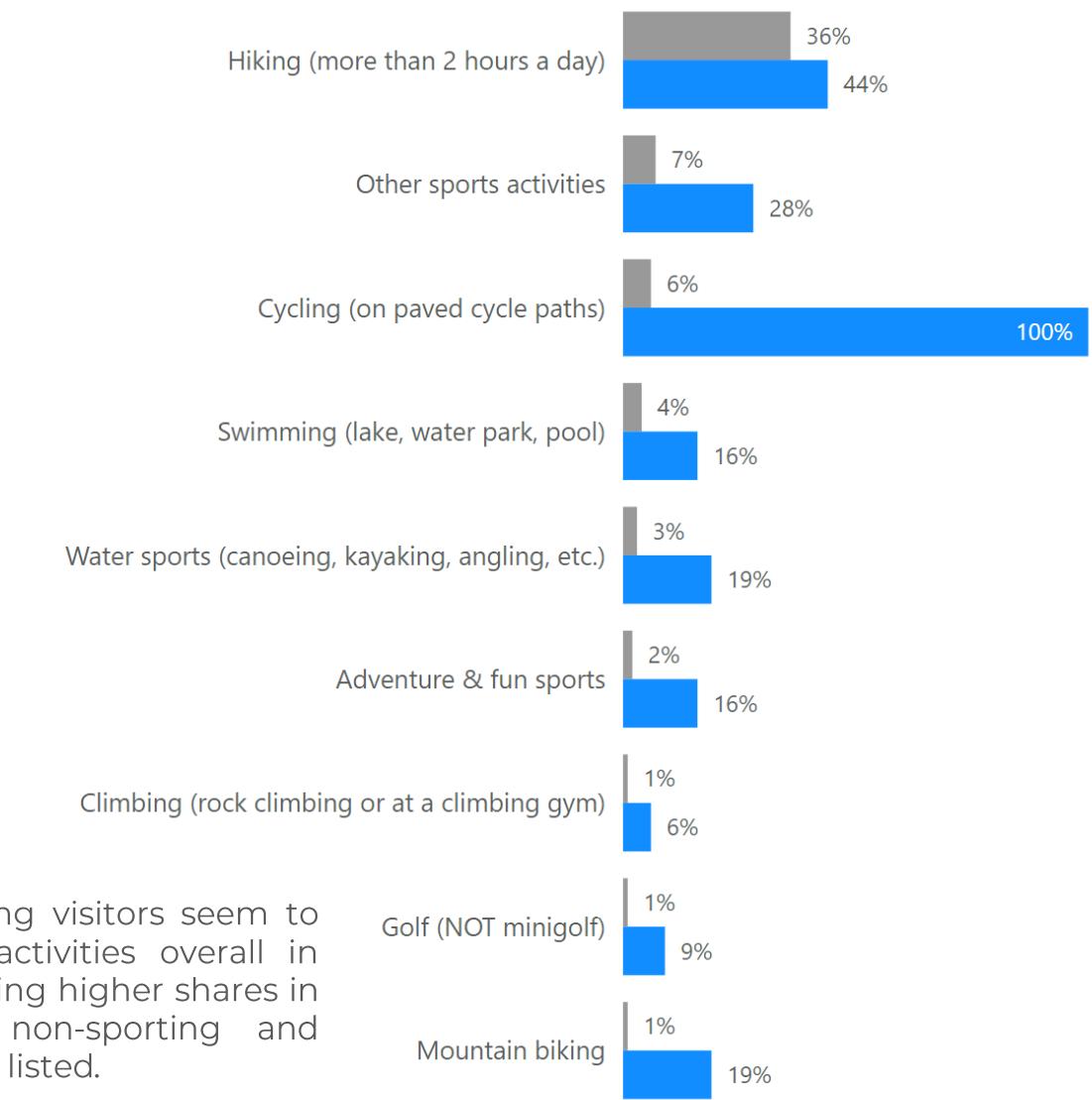
● All Inbound ● Cycling (activity)



Sporting activities

Same-day visitors

● All Inbound ● Cycling (activity)



- Same-day cycling visitors seem to include more activities overall in their visit, showing higher shares in almost every non-sporting and sporting activity listed.

0% 20% 40% 60% 80%

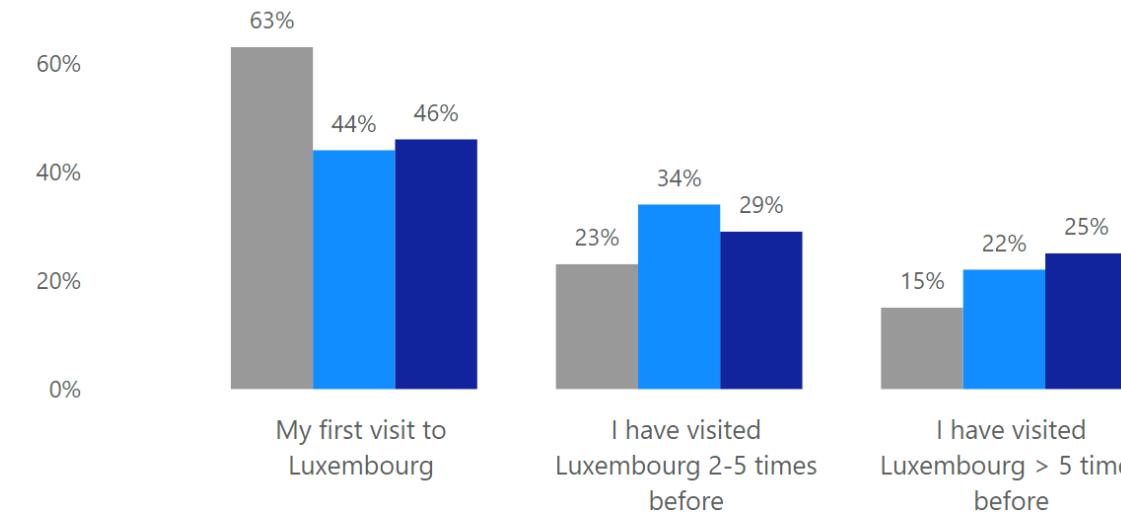
0% 50% 100%

Source: LFT/Iires Visitor Survey, 2023-2024.

Frequency of visit

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)



Travel party

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)



First-time visitors

Visitors with overnight

44%
Cycling

46%
Mountainbike

63%
All Inbound

- Cycling (and mountainbiking) visitors are more likely to have visited Luxembourg previously.
- They also show a higher share of cross-border travel when on a trip to Luxembourg, compared to overall visitors.

Visitors spending nights in Luxembourg and abroad during same trip

Visitors with overnight

59%
Cycling

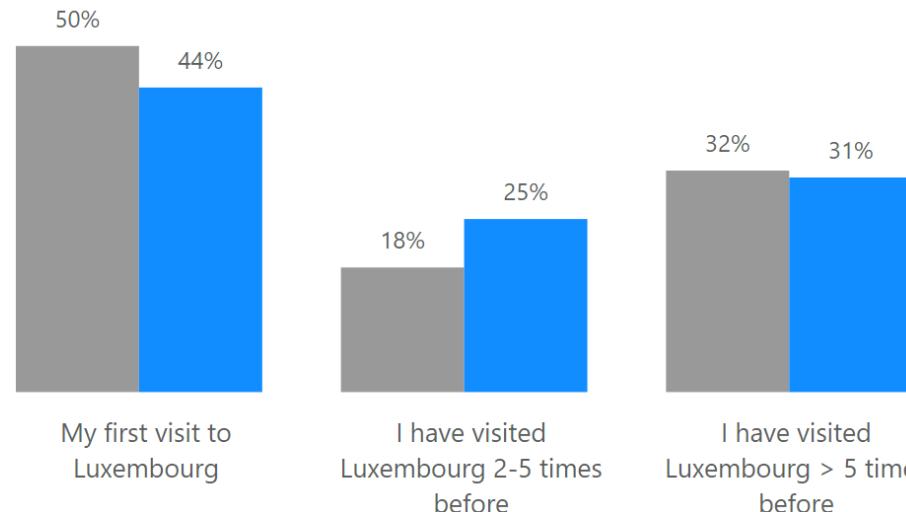
53%
Mountainbike

39%
All Inbound

Frequency of visit

Same-day visitors

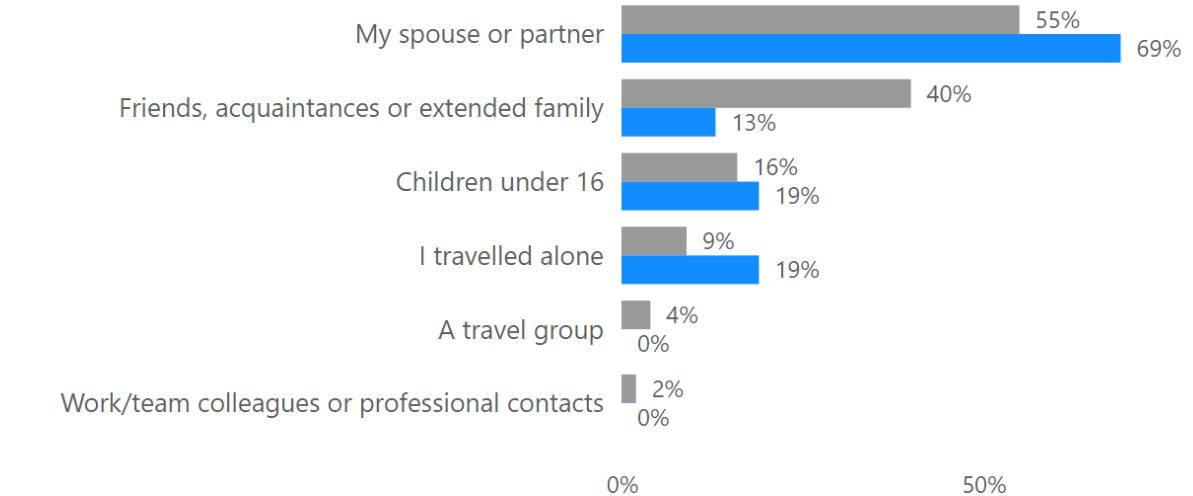
● All Inbound ● Cycling (activity)



Travel party

Same-day visitors

● All Inbound ● Cycling (activity)



First-time visitors

Same-day visitors

44%

Cycling

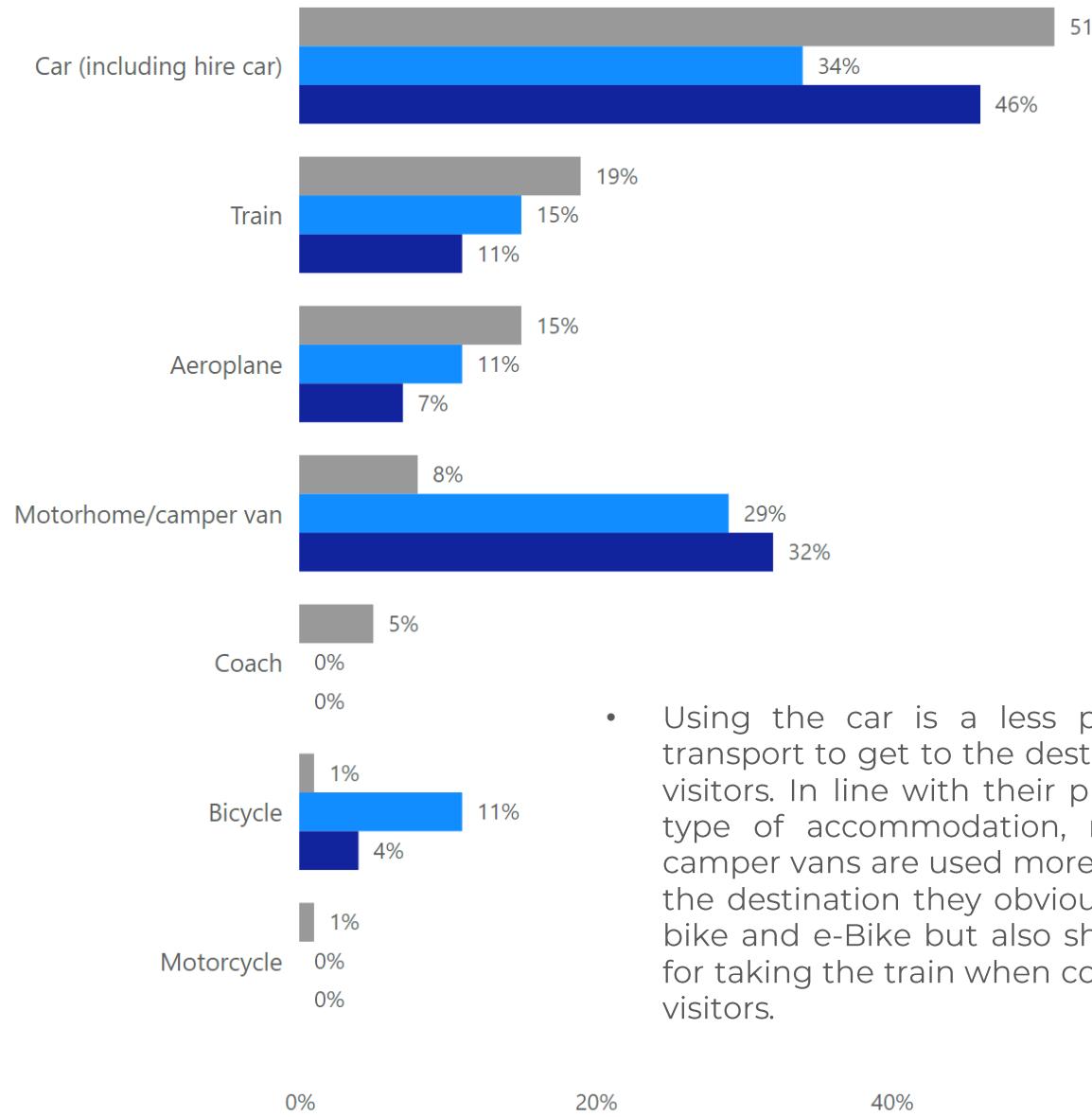
50%

All Inbound

Transport to destination

Visitors with overnight

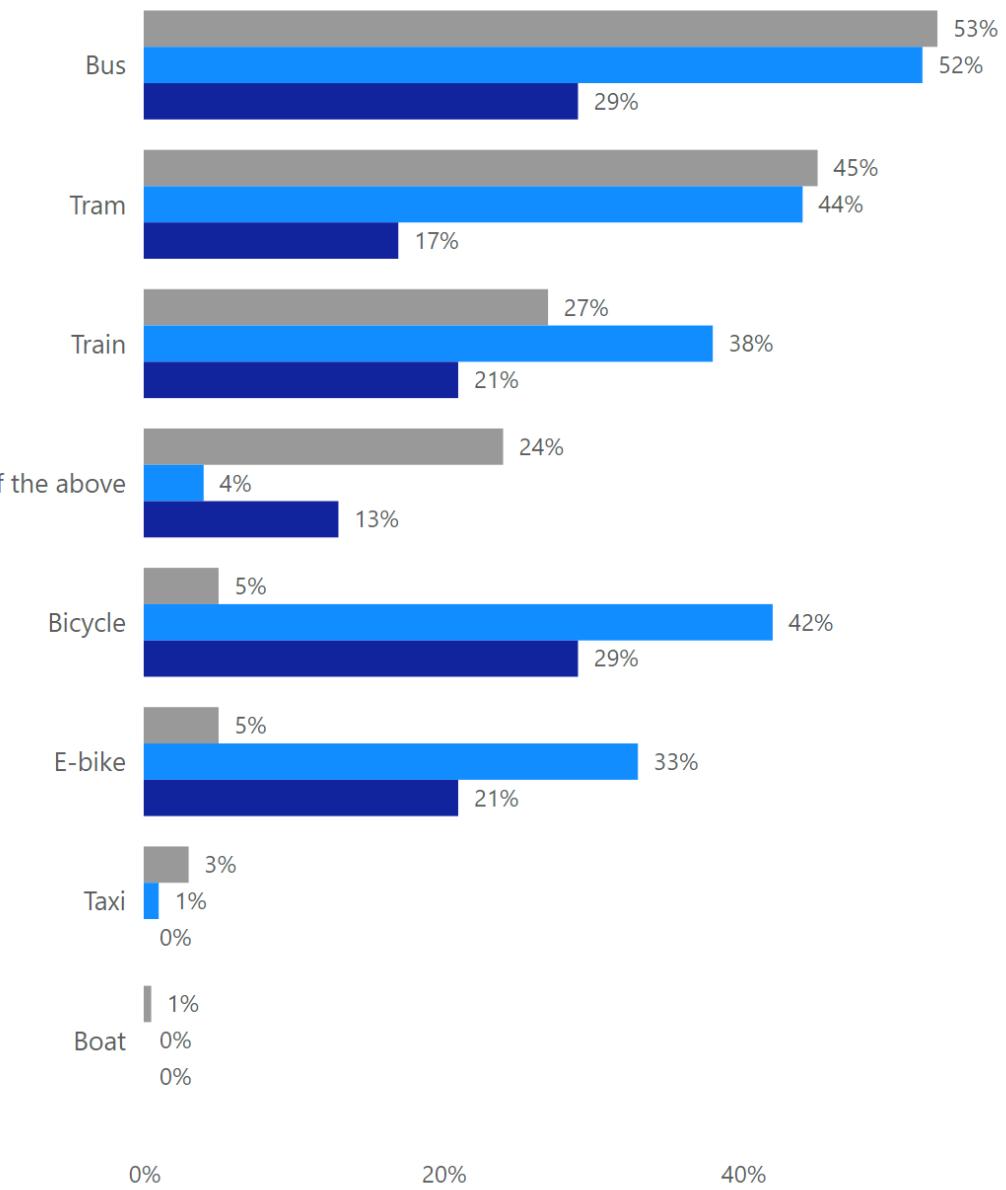
● All Inbound ● Cycling (activity) ● MTB (activity)



Transport in destination

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

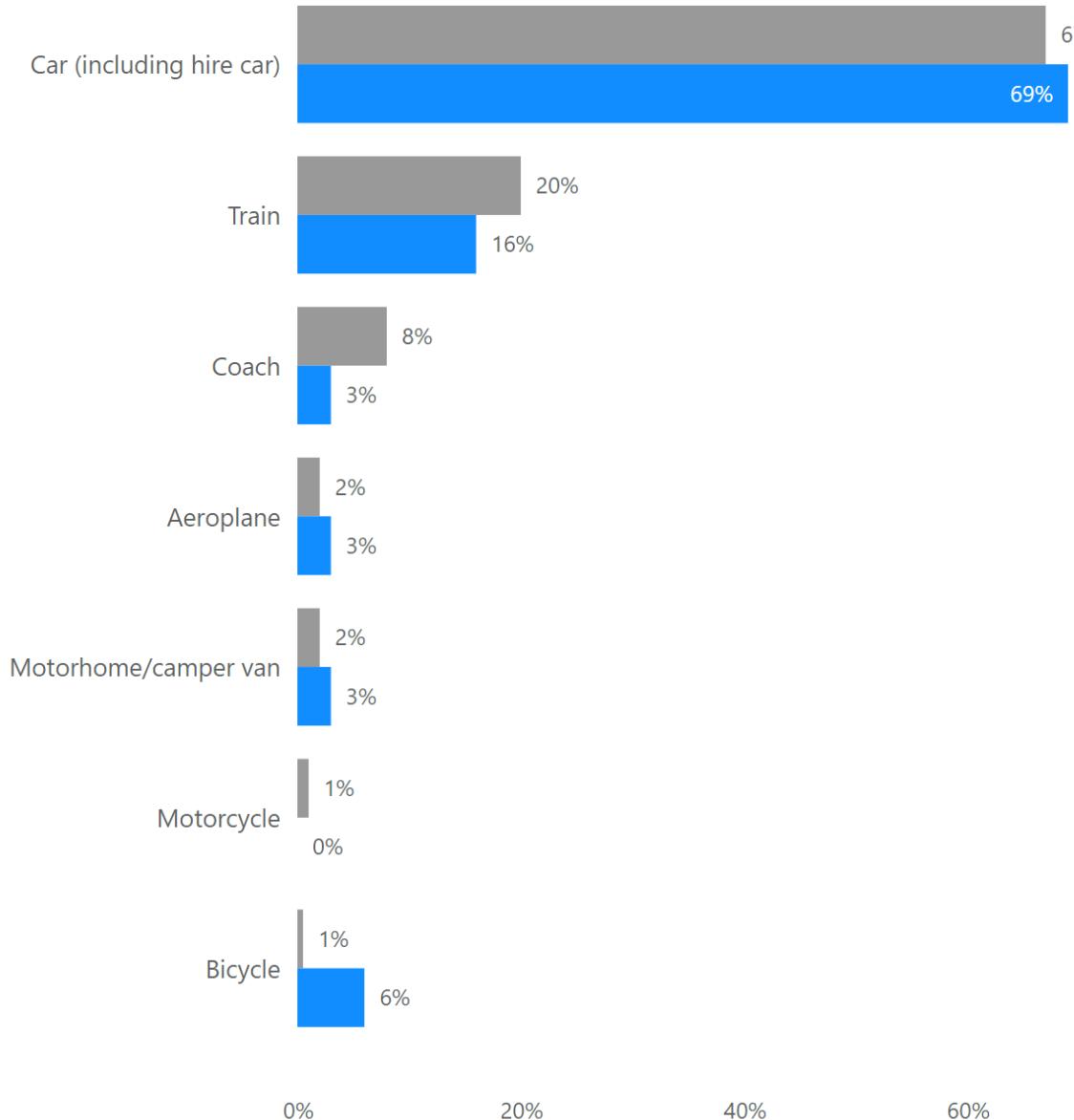


- Using the car is a less popular choice of transport to get to the destination for cycling visitors. In line with their preferences for the type of accommodation, motorhomes and camper vans are used more frequently. Inside the destination they obviously travel a lot by bike and e-Bike but also show higher shares for taking the train when compared to overall visitors.

Transport to destination

Same-day visitors

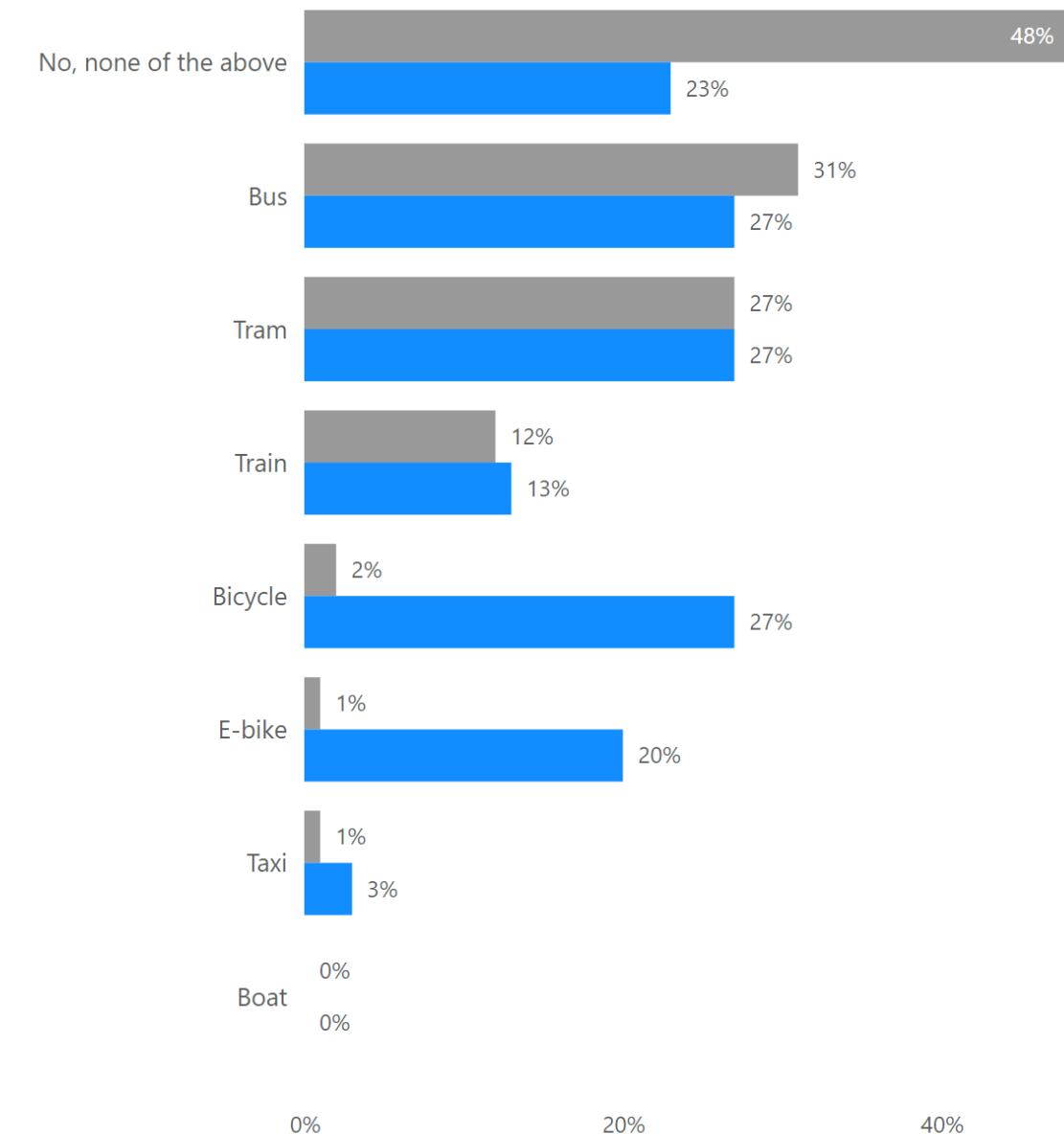
● All Inbound ● Cycling (activity)



Transport in destination

Same-day visitors

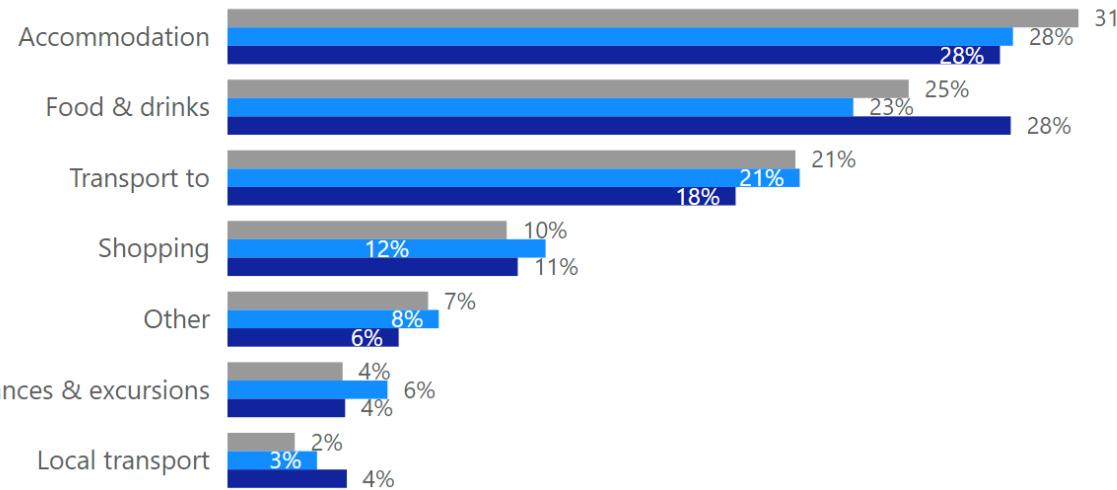
● All Inbound ● Cycling (activity)



Spending categories

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

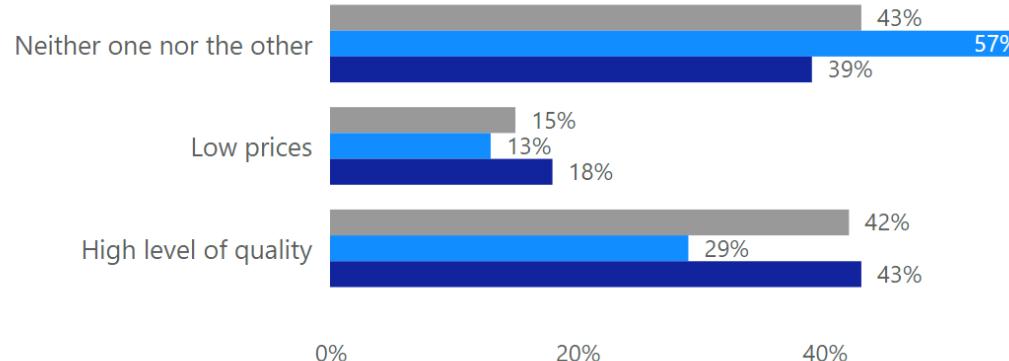


- Cycling visitors spend on average a little less per day but stay longer than overall visitors. They are also more evenly shared with regard to price- and quality.-orientation.

Quality vs. price orientation

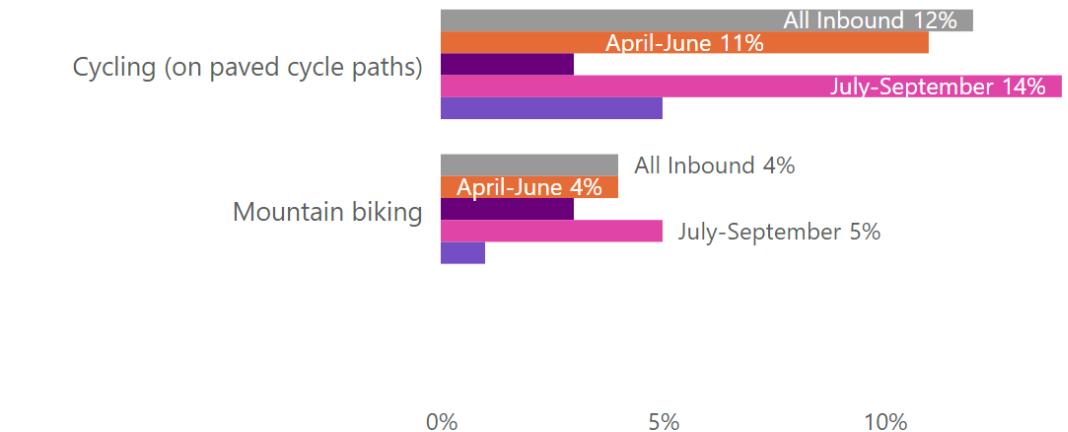
Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)



Shares by arrival months

Visitors with overnight



- The months from July to September show the highest shares of visitors with a cycling activity

Spend/pers./trip Spend/pers./night Length of stay (nights)

Visitors with overnight

Visitors with overnight

Visitors with overnight

701 €

Cycling

151 €

Cycling

4,7

Cycling

1.084 €

Mountainbike

179 €

Mountainbike

6,0

Mountainbike

619 €

All Inbound

160 €

All Inbound

3,9

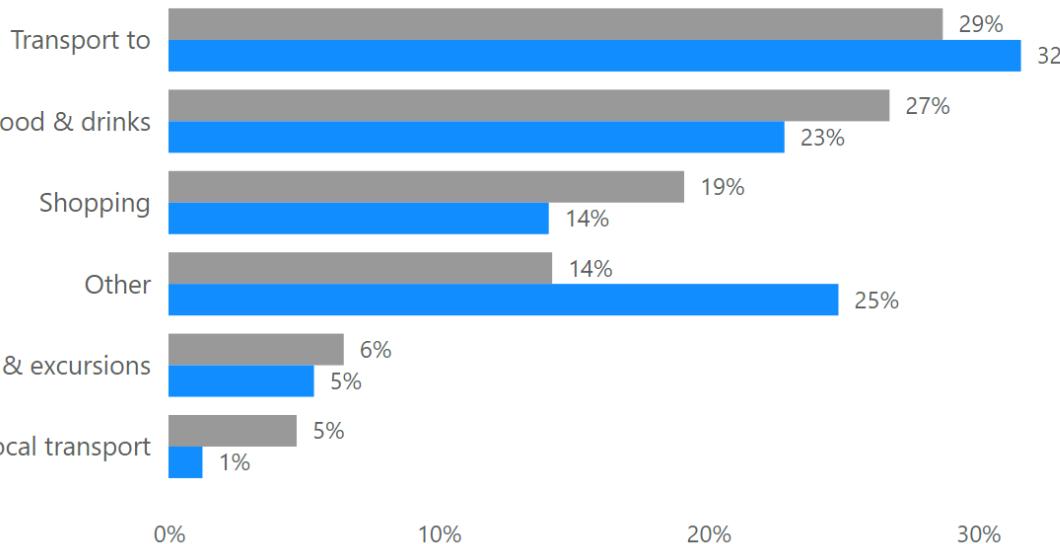
All Inbound

Source: LFT/Iires Visitor Survey, 2023-2024.

Spending categories

Same-day visitors

● All Inbound ● Cycling (activity)



Spend/pers./exc urs.

Same-day visitors

539 €

Cycling

245 €

All Inbound

Shares by arrival months

Same-day visitors

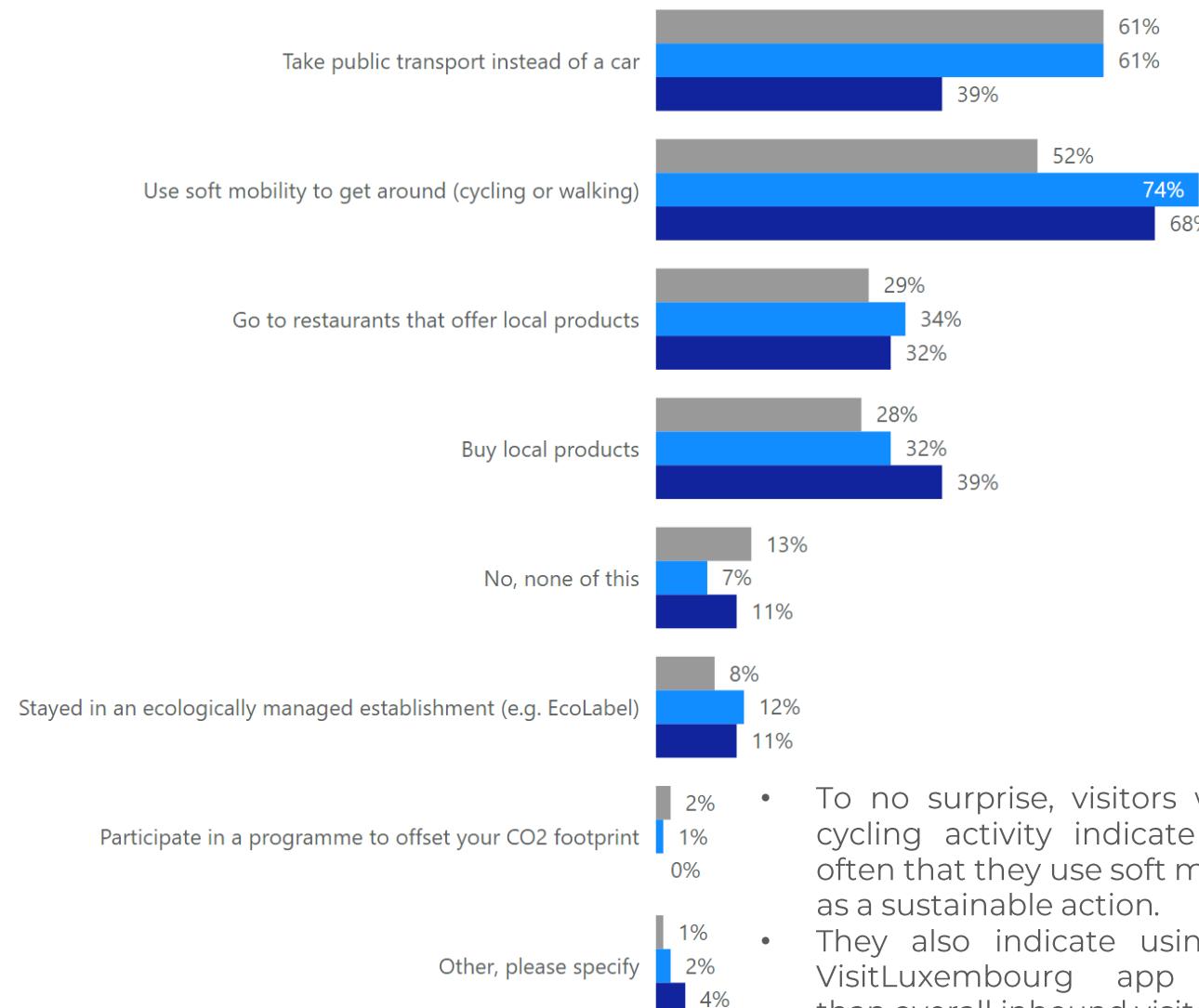
Cycling (on paved cycle paths)



Sustainable actions during stay

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

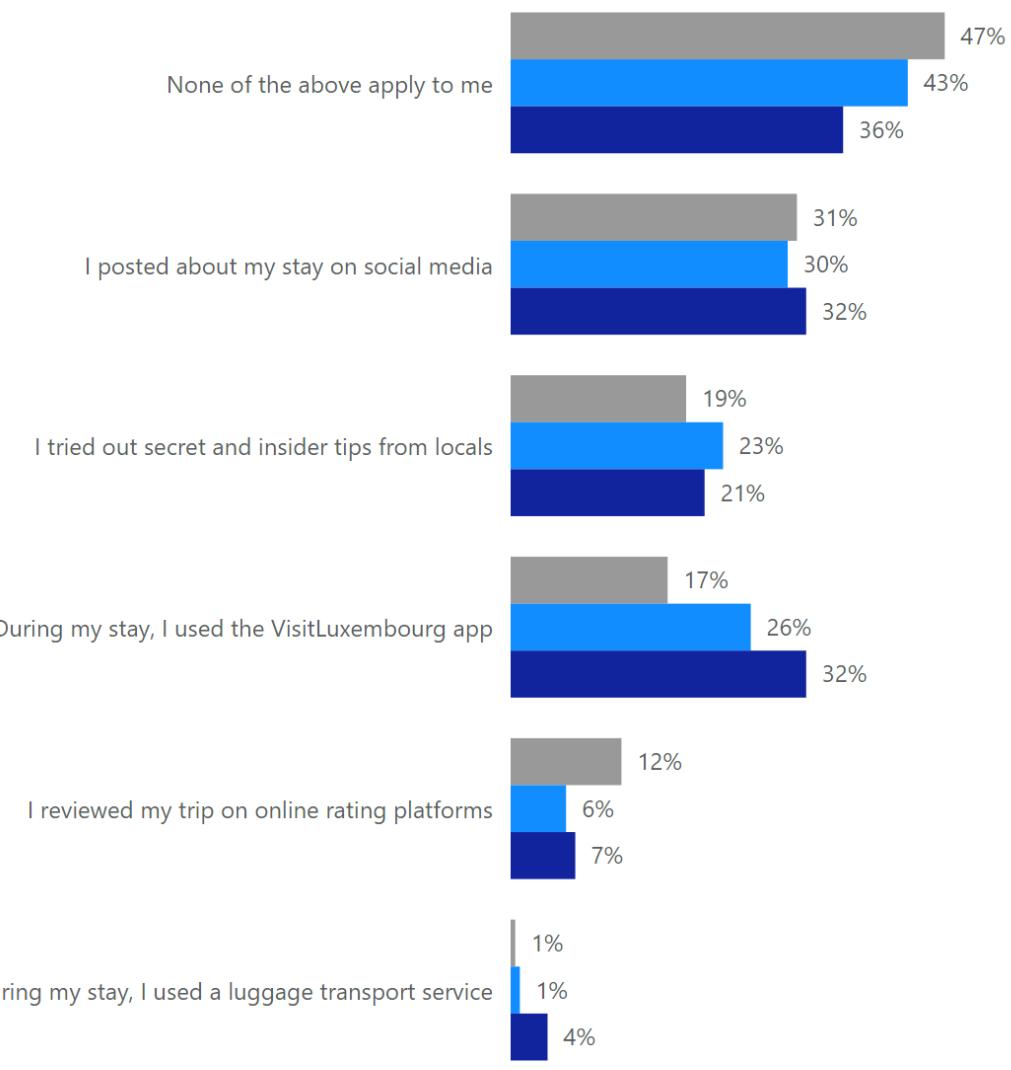


- To no surprise, visitors with a cycling activity indicate more often that they use soft mobility as a sustainable action.
- They also indicate using the VisitLuxembourg app more than overall inbound visitors.

Services used during stay

Visitors with overnight

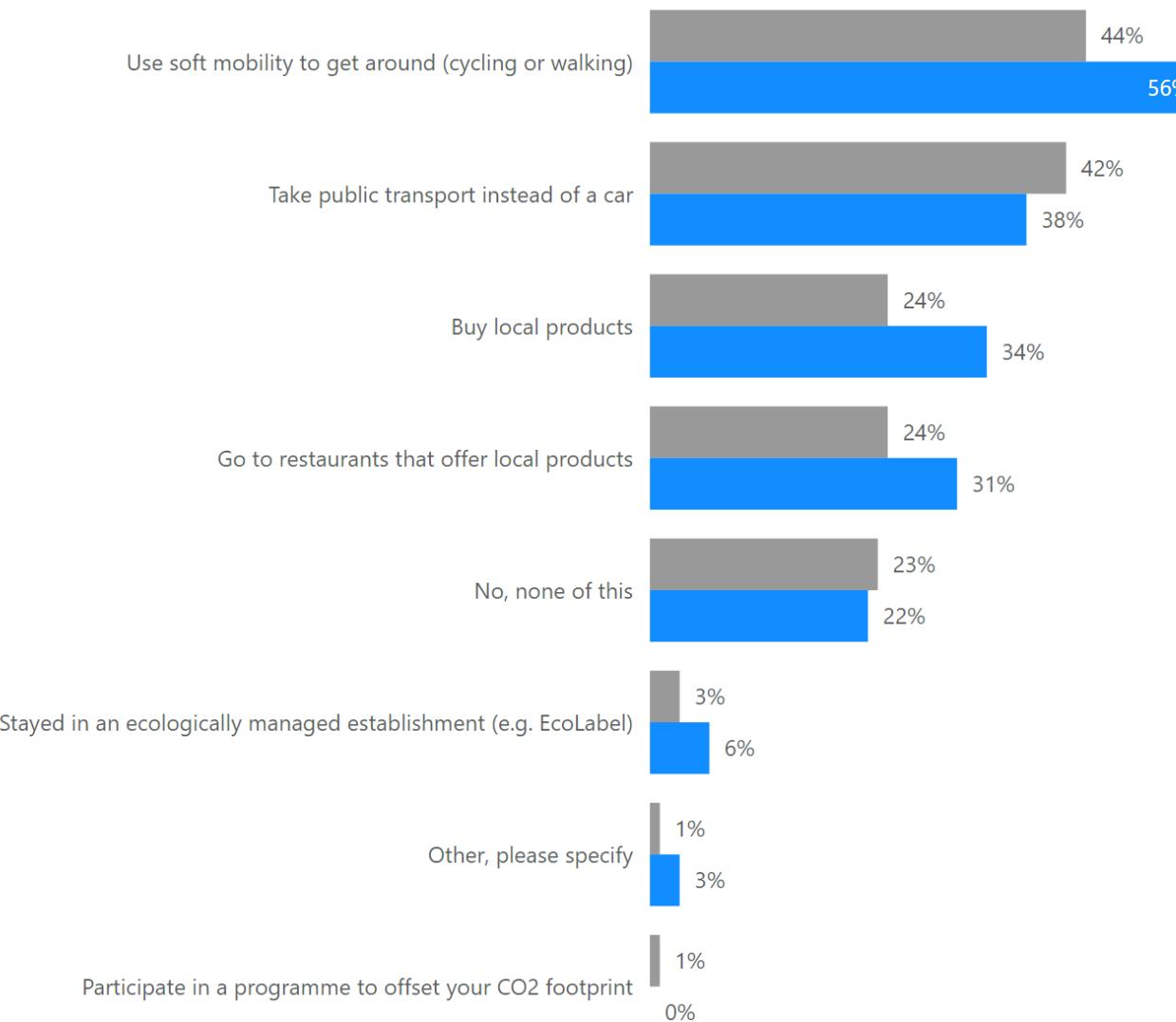
● All Inbound ● Cycling (activity) ● MTB (activity)



Sustainable actions during stay

Same-day visitors

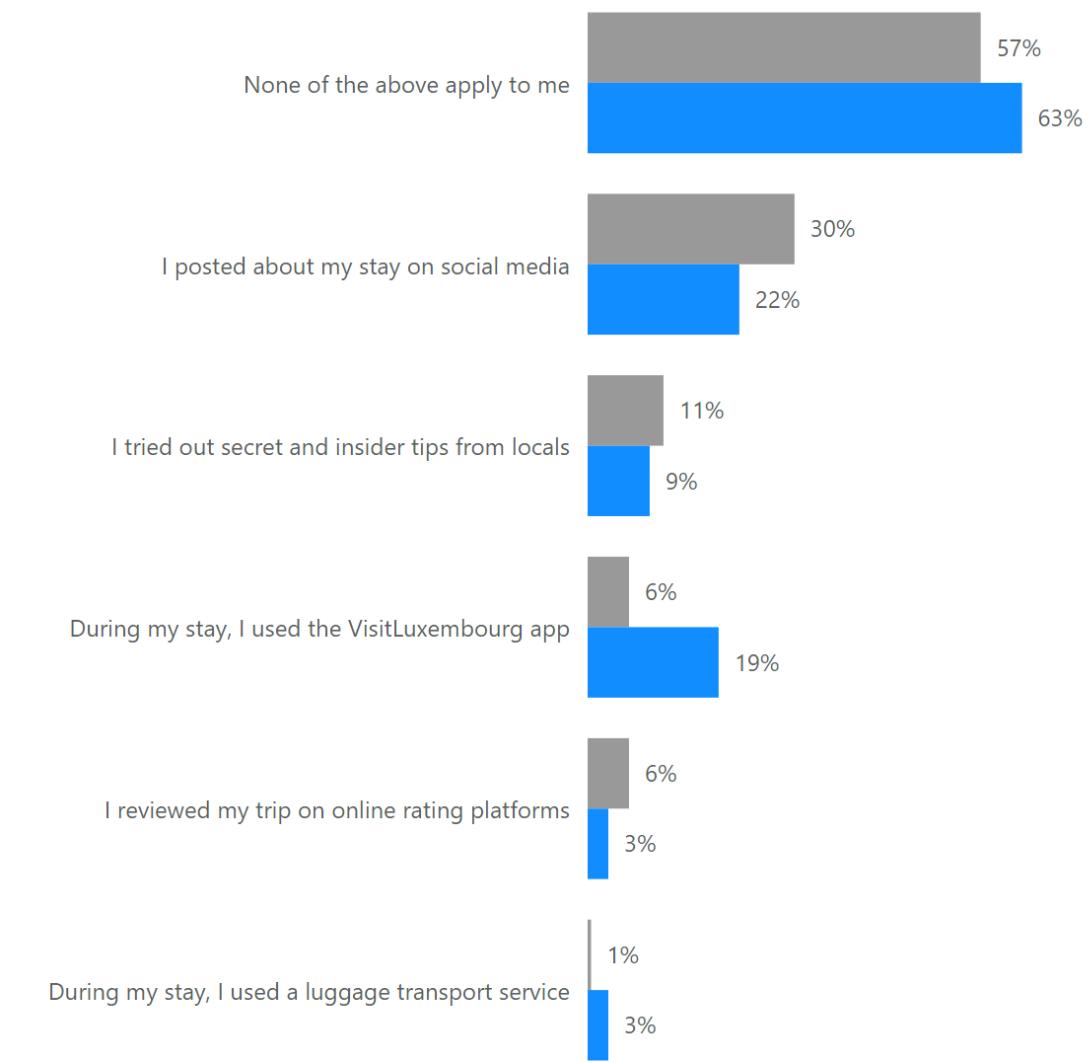
● All Inbound ● Cycling (activity)



Services used during stay

Same-day visitors

● All Inbound ● Cycling (activity)

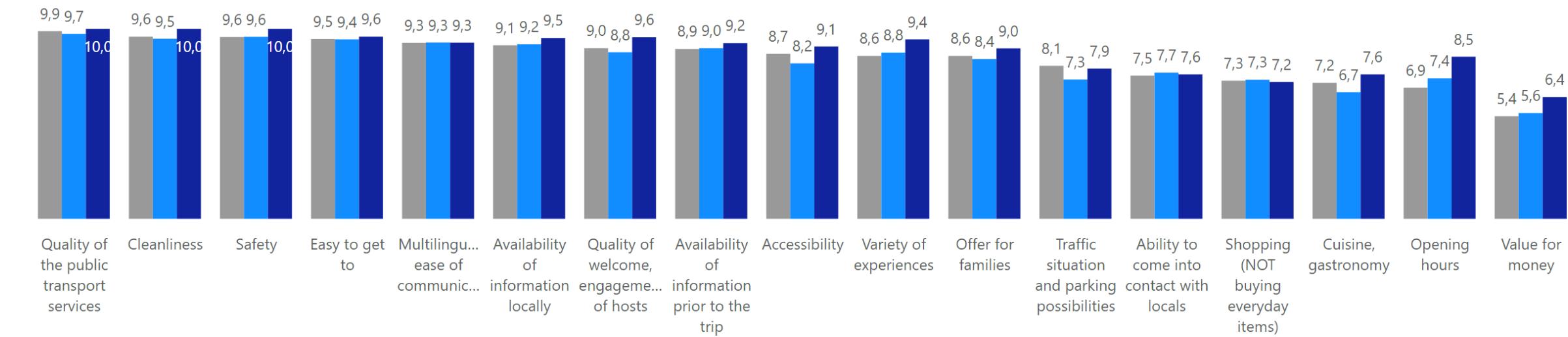


Satisfaction items

Visitors with overnight

Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)

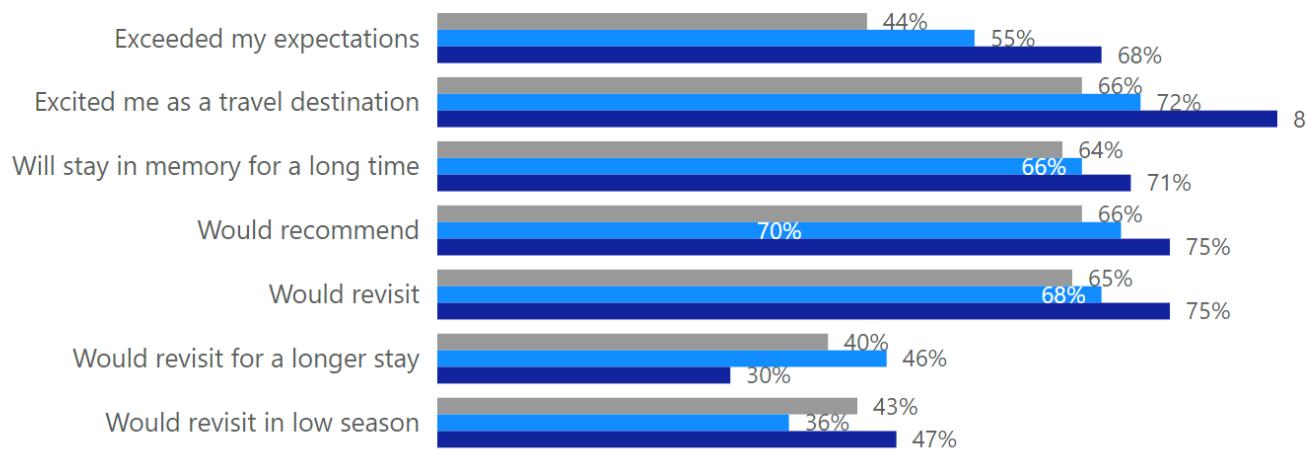
- Cycling visitors are a little less satisfied with the accessibility and traffic/parking situation. In contrast, they are a little more satisfied with opening hours and the variety of experiences. In regard to overall satisfaction, they show higher shares of agreement in almost every category. Reasons for poor value-to-money do not differ much from overall visitors.



Overall satisfaction - % "strongly agree"

Visitors with overnight

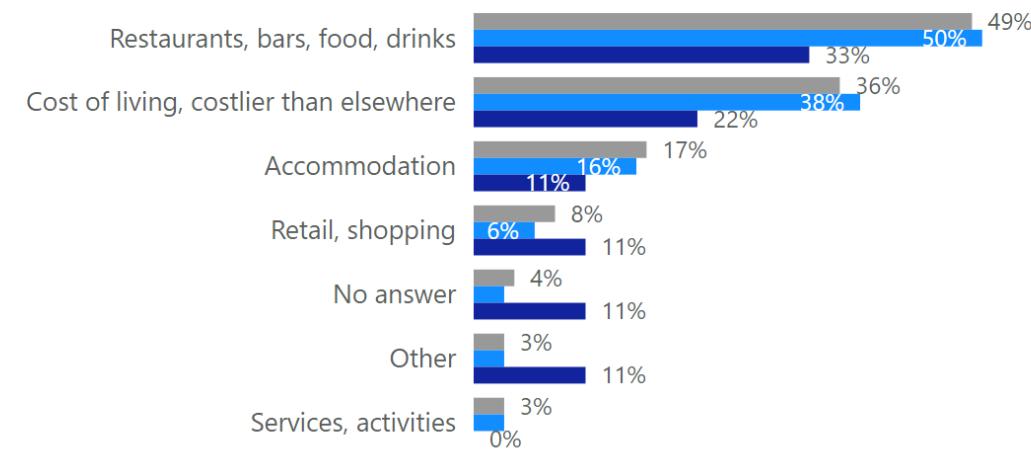
Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)



Reasons for poor value-for-money

Visitors with overnight

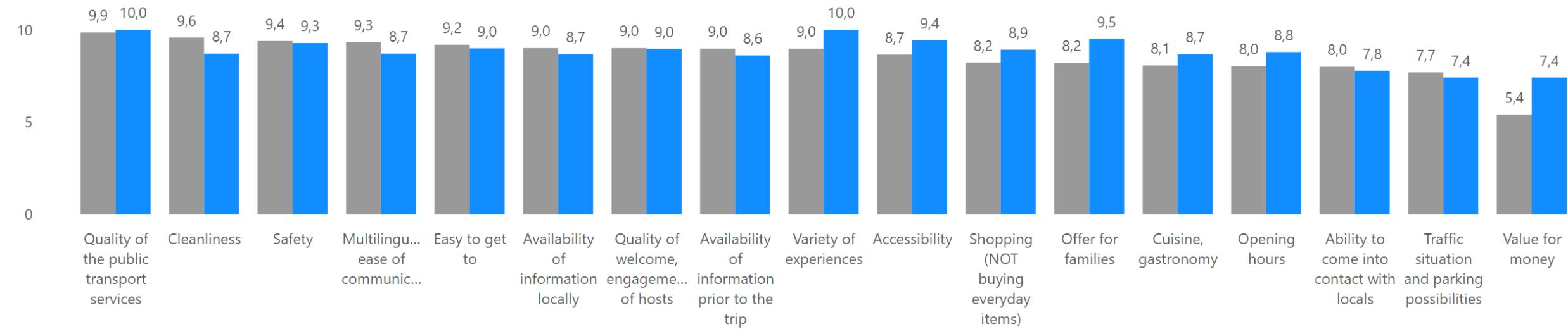
Attribut ● All Inbound ● Cycling (activity) ● MTB (activity)



Satisfaction items

Same-day visitors

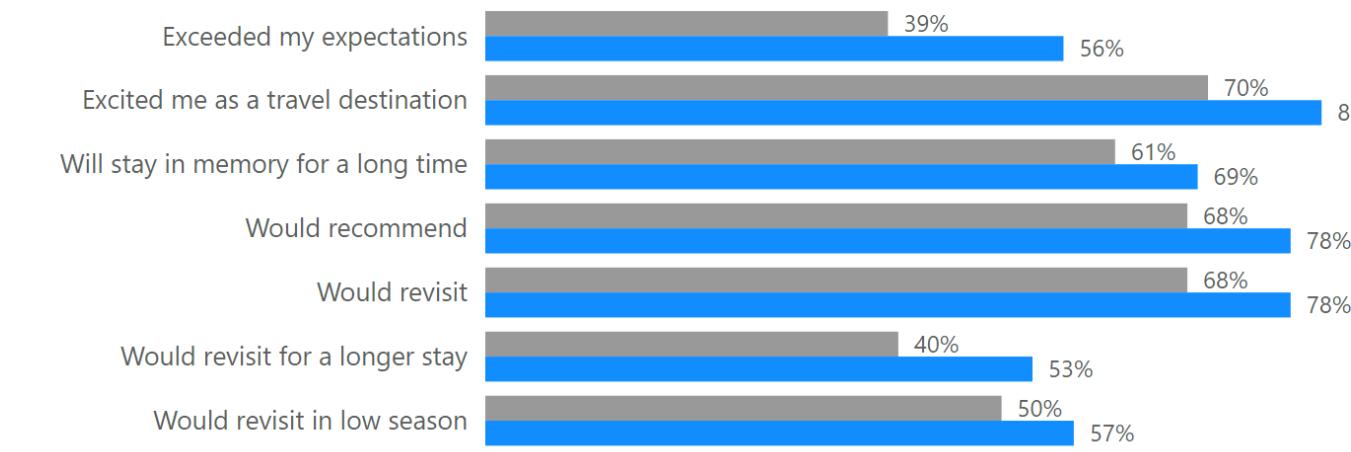
Attribut ● All Inbound ● Cycling (activity)



Overall satisfaction - % "strongly agree"

Same-day visitors

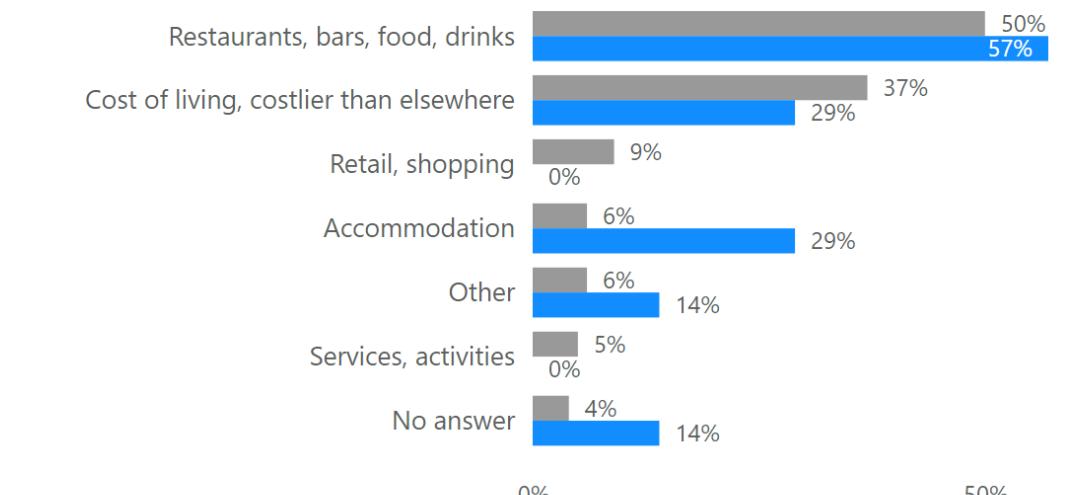
Attribut ● All Inbound ● Cycling (activity)



Reasons for poor value-for-money

Same-day visitors

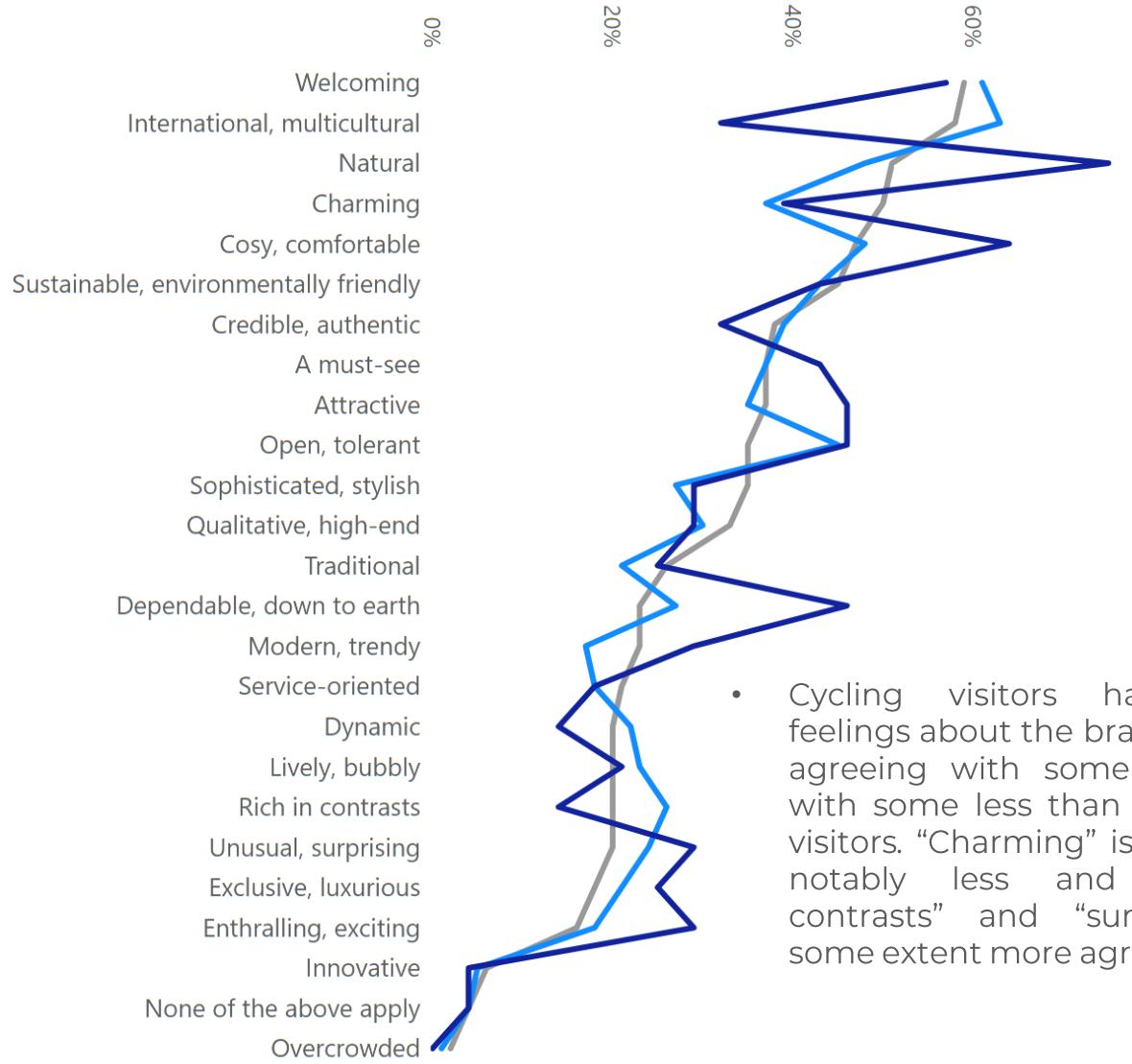
Attribut ● All Inbound ● Cycling (activity)



Brand features

Visitors with overnight

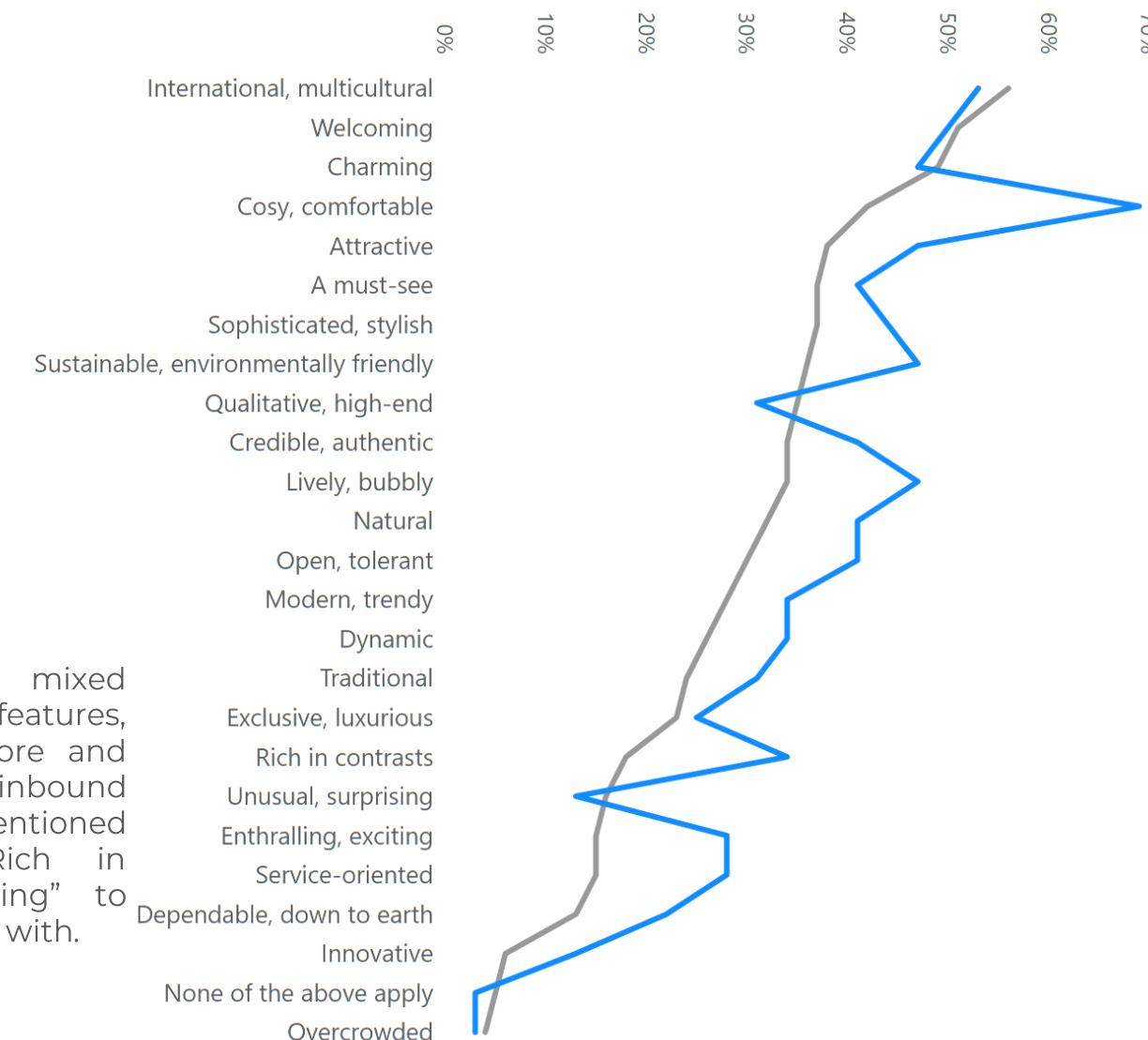
● All Inbound ● Cycling (activity) ● MTB (activity)



Brand features

Same-day visitors

● All Inbound ● Cycling (activity)

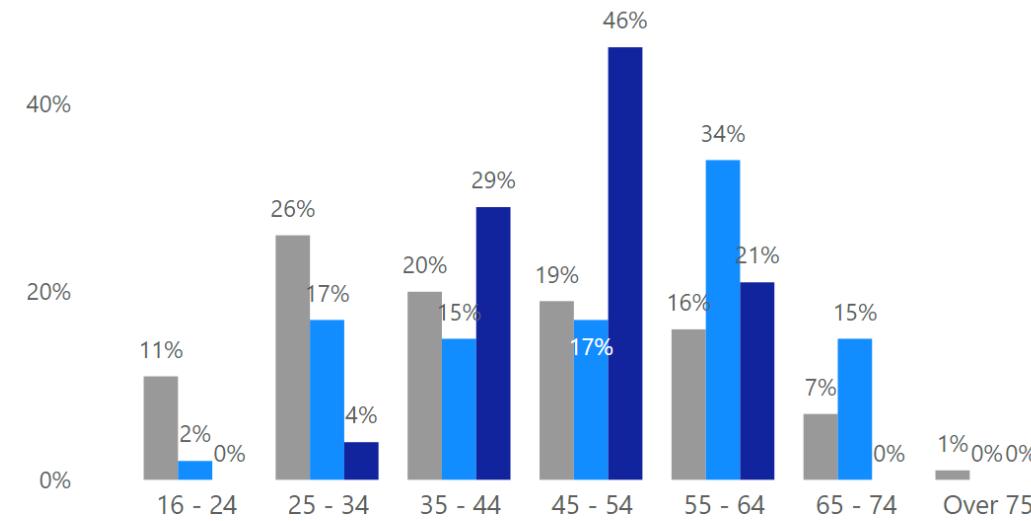


- Cycling visitors have mixed feelings about the brand features, agreeing with some more and with some less than all inbound visitors. "Charming" is mentioned notably less and "Rich in contrasts" and "surprising" to some extent more agreed with.

Age

Visitors with overnight

● All Inbound ● Cycling (activity) ● MTB (activity)

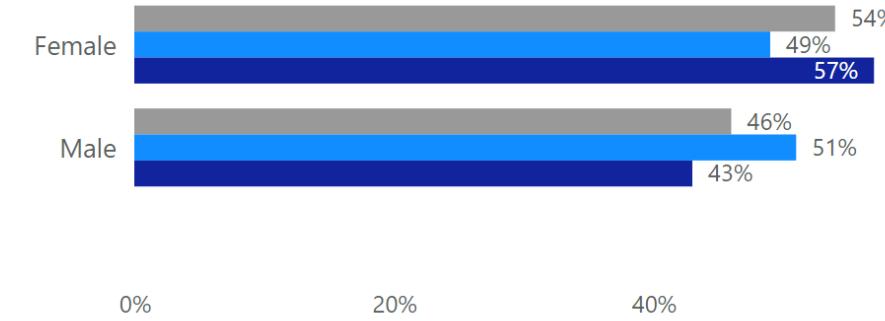


- People aged 55+ are more prominent among cycling visitors when compared to overall visitors while gender is distributed almost evenly for cycling visitors.

Gender

Visitors with overnight

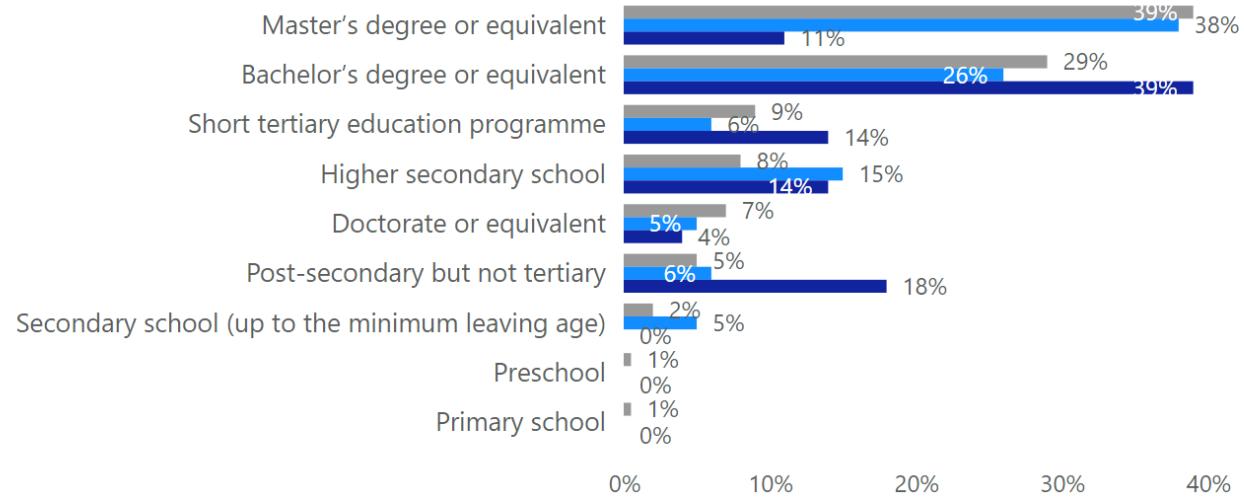
● All Inbound ● Cycling (activity) ● MTB (activity)



Education

Visitors with overnight

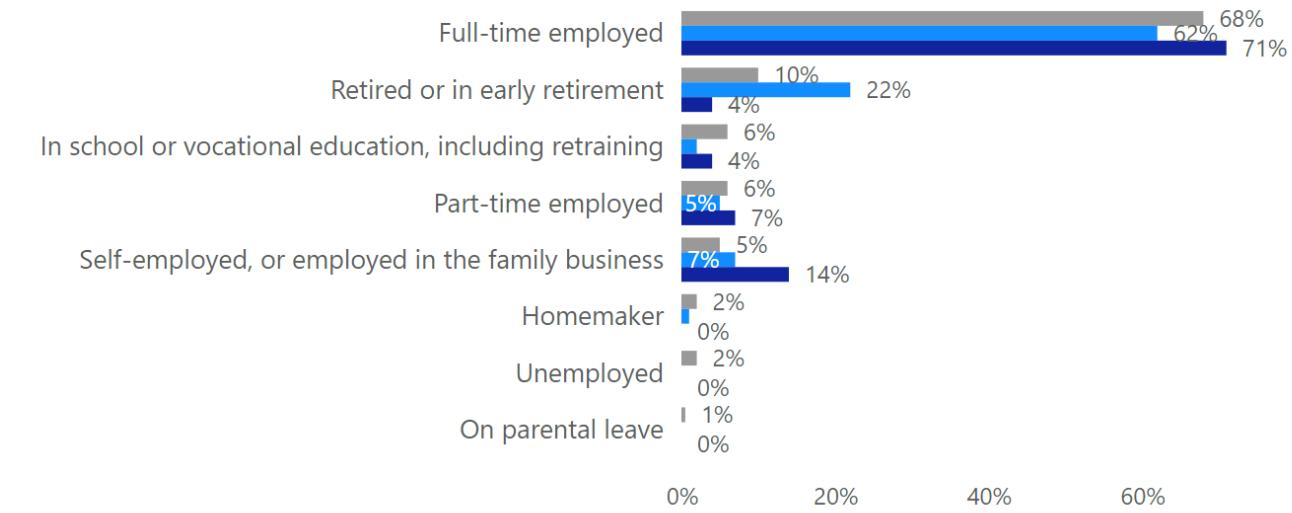
● All Inbound ● Cycling (activity) ● MTB (activity)



Employment

Visitors with overnight

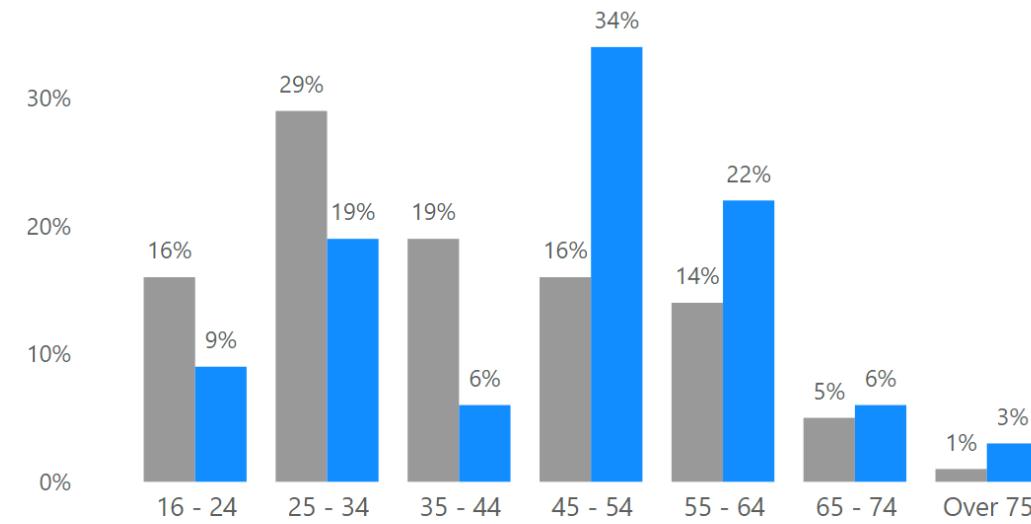
● All Inbound ● Cycling (activity) ● MTB (activity)



Age

Same-day visitors

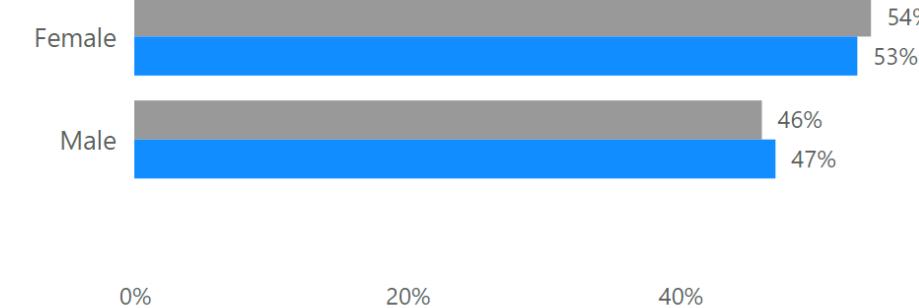
● All Inbound ● Cycling (activity)



Gender

Same-day visitors

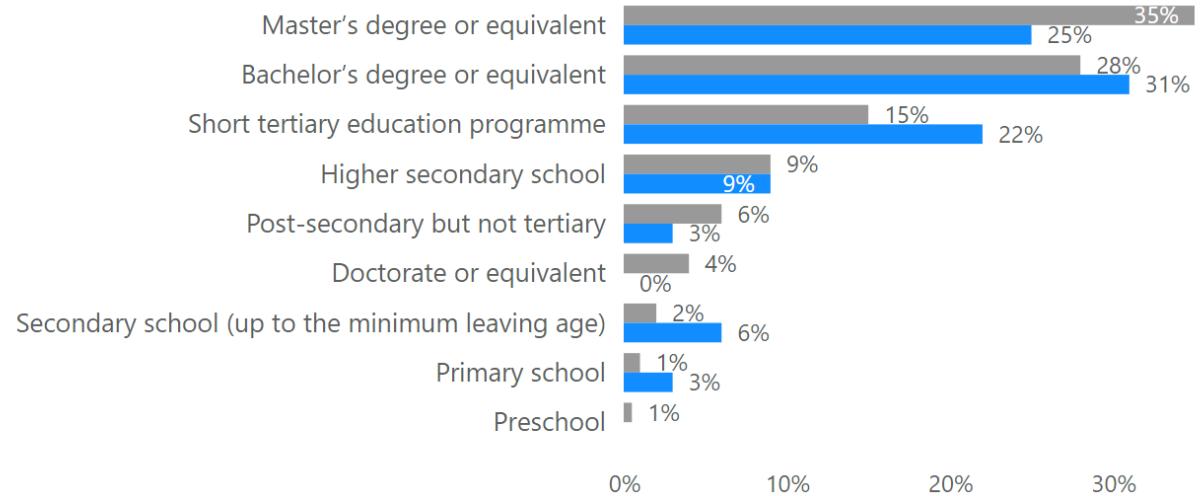
● All Inbound ● Cycling (activity)



Education

Same-day visitors

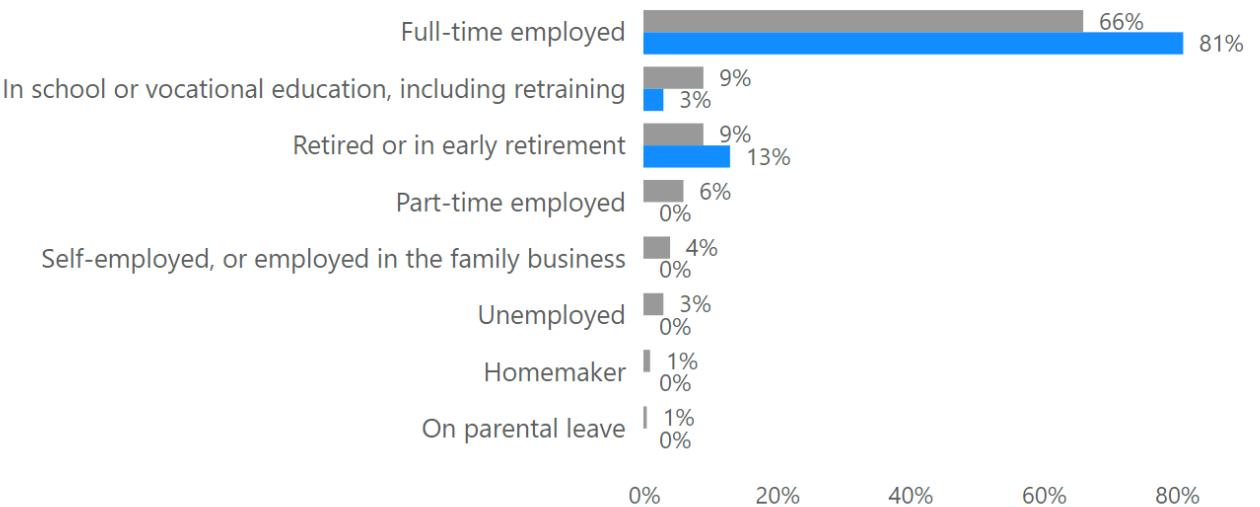
● All Inbound ● Cycling (activity)



Employment

Same-day visitors

● All Inbound ● Cycling (activity)





Destination Awareness & Growth Potential for Cycling & Mountainbiking segments

General theme interest - Cycling



	Rank (*)	Number of themes surveyed	% „very interested“ in theme	% „interested“ in theme	% „interested“, Ø all themes	„Interested“ in theme, pop., mn (**)
Average Europe	31	33	16%	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
	37	38	10%	27%	57%	11,4
	38	38	10%	27%	57%	9,2
	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	10%	30%	60%	2,3

General interest in the respective themes when going on a holiday
% of respondents agreeing.

(*) Rank among all surveyed themes in respective source markets.
(**) Aged 18-75.

Luxembourg's perceived theme competence - Cycling



	Rank (*)	Number of themes surveyed	% „Luxembourg very suitable“	% „Lux. very suitable“, Ø all themes	„Luxembourg very suitable“, pop., mn (**)	
Average Europe	22	26	17%	24%	-	<ul style="list-style-type: none"> Overall theme interest for cycling is relatively low in most source markets; it ranks highest among all themes in the Netherlands and Belgium, and lowest in Southern European markets (see previous slide)
	15	26	20%	23%	11,8	
	11	26	26%	26%	3,3	
	24	26	16%	22%	1,0	<ul style="list-style-type: none"> Luxembourg's suitability for this theme is perceived highest in Belgium and the Netherlands, followed by Germany. It ranks last in Spain and Portugal. For every country, the share of people considering Luxembourg very suitable for cycling is below the average of all themes.
	18	26	18%	23%	1,2	
	9	26	24%	25%	2,0	
	16	26	18%	22%	8,4	
	25	26	13%	22%	6,1	
	30	31	12%	23%	5,0	
	31	31	13%	26%	4,3	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 markets.
	17	20	18%	27%	0,6	(**) Aged 18-75.
	19	20	17%	24%	0,7	
	19	20	12%	21%	0,8	
	20	20	12%	33%	0,9	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 13 European source markets) - LFT target segments

	„Interested in theme“, Rank	Number of themes surveyed	„Luxembourg very suitable“, Rank	Number of themes surveyed
EXP	25	26	23	26
NLA	17	26	16	26
RS	25	26	22	26
SB	25	26	22	26
PS	26	26	25	26
LO	25	26	21	26

- Interest and perceived suitability of Luxembourg for cycling is expectedly highest among Nature-Loving Actives. It also ranks relatively well among Leisure Oriented with regard to Luxembourg's perceived theme competence.

General theme interest – Mountainbiking



	Rank (*)	Number of themes surveyed	% „very interested“ in theme	% „interested“ in theme	% „interested“, Ø all themes	„Interested“ in theme, pop., mn (**)
Average Europe	32	33	13%	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
	36	38	11%	31%	57%	13,2
	36	38	11%	31%	57%	10,6
	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

General interest in the respective themes when going on a holiday
% of respondents agreeing.

(*) Rank among all surveyed themes in respective source markets.
(**) Aged 18-75.

Luxembourg's perceived theme competence - Mountainbiking



	Rank (*)	Number of themes surveyed	% „Luxembourg very suitable“	% „Lux. very suitable“, Ø all themes	„Luxembourg very suitable“, pop., mn (**)
Average Europe	26	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
	28	31	13%	23%	5,6
	28	31	16%	26%	5,5
	20	20	14%	27%	0,5
	20	20	16%	24%	0,7
	20	20	11%	21%	0,8
	19	20	14%	33%	1,1

- A typical niche theme, mountainbiking ranks low across travel themes in terms of overall interest. But interest is comparatively strong in the DACH area and the Netherlands.

- The Dutch and Belgians perceive Luxembourg as particularly suitable for mountainbiking, likely due to a higher degree of familiarity with its offer. Theme association with Luxembourg is also marginally higher in Spain and Denmark for mountainbiking.

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

(*) Rank among all surveyed themes in respective source markets.

(**) Aged 18-75.

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

Mountainbiking



(Ø 13 European source markets) - LFT target segments

	„Interested in theme“, Rank	Number of themes surveyed	„Luxembourg very suitable“, Rank	Number of themes surveyed
EXP	26	26	26	26
NLA	23	26	19	26
RS	26	26	26	26
SB	26	26	23	26
PS	25	26	26	26
LO	26	26	23	26

- Besides Nature-Loving Actives, Short Breakers and Leisure Oriented display a slightly higher theme competence perception of Luxembourg for mountainbiking, mainly among the Dutch and Belgians in these target groups.



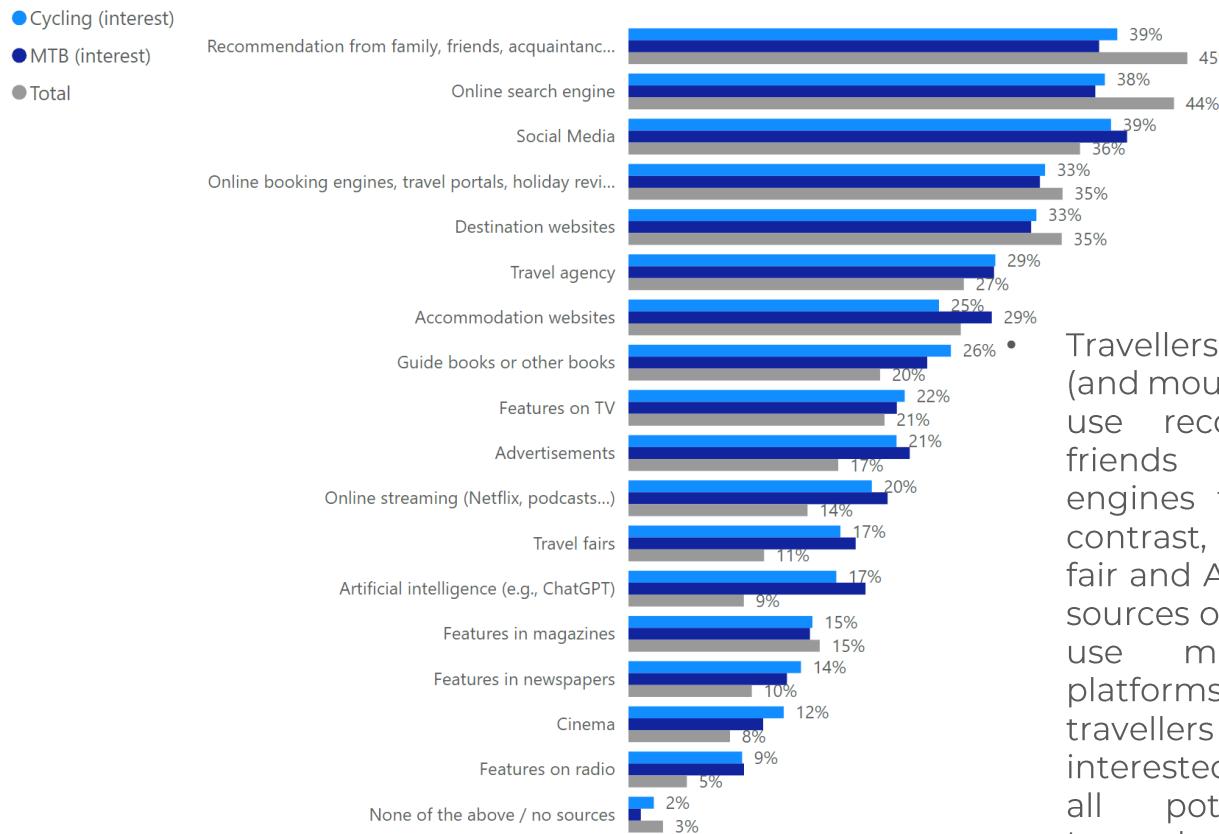
Trip organisation and preferences of Cycling & Mountainbiking segments



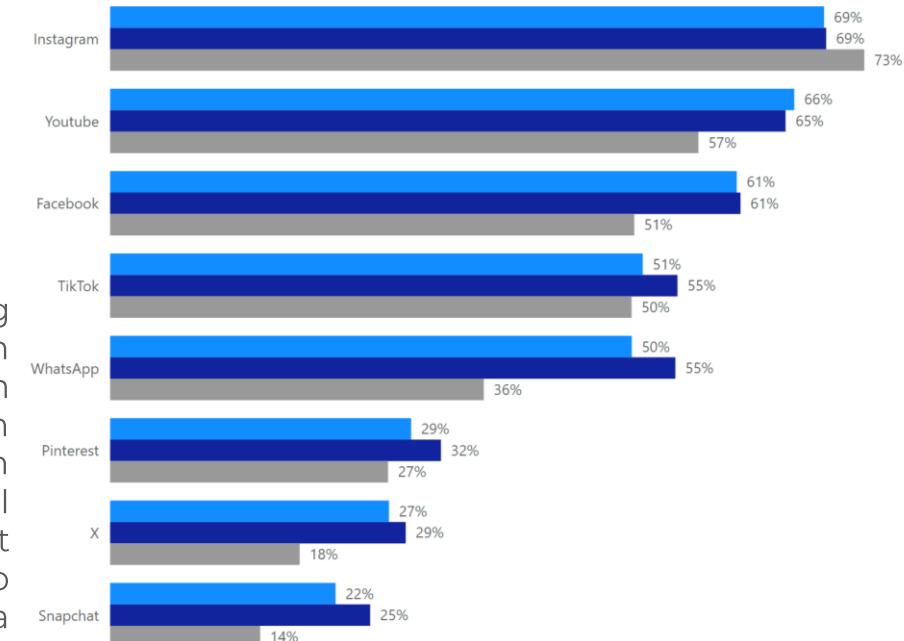
Trip organisation and preferences (1)

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

Preferred sources of travel inspiration



Travellers interested in cycling (and mountainbiking) less often use recommendations from friends and online search engines than all travellers. In contrast, books as well as travel fair and AI are more prominent sources of inspiration. They also use most social media platforms more often than all travellers and would be more interested in longer trips than all potential visitors to Luxembourg.



Interest for longer stays and cross-border stays to Luxembourg (in case of general travel intent)

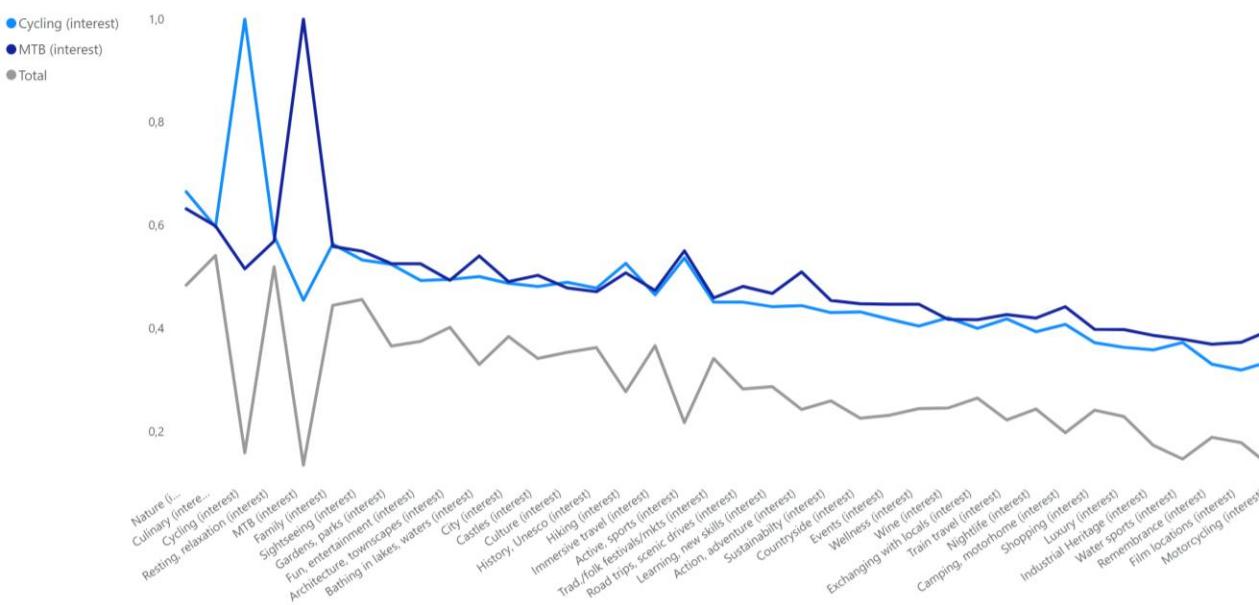


Trip organisation and preferences (2)

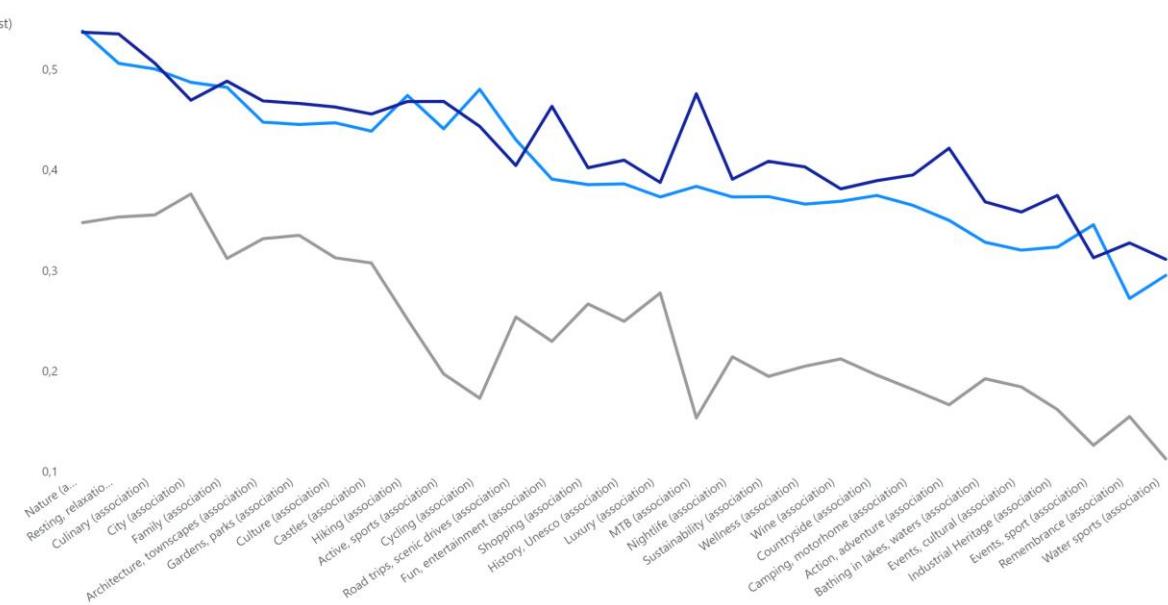


— Average European source markets, total vs. travellers interested in cycling and mountainbiking

General theme interest (when going on a holiday)



Luxembourg's perceived theme suitability



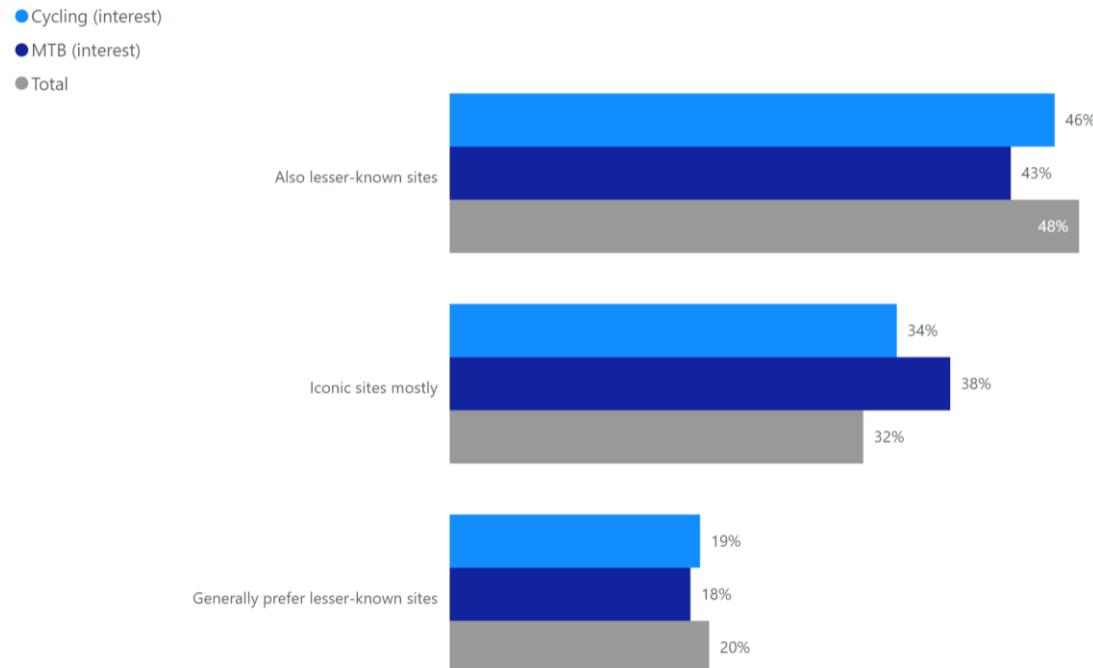
- The general theme interest of travellers interested in cycling is higher than that of total travellers. Interest in being active / doing sports, nature, countryside, action and camping especially differs from that of overall travellers.
- Luxembourg's perceived suitability is also especially higher for most of these themes, plus family.
- Travellers interest in mountainbiking show largely similar patterns to cycling-interested travellers.

Trip organisation and preferences (3)

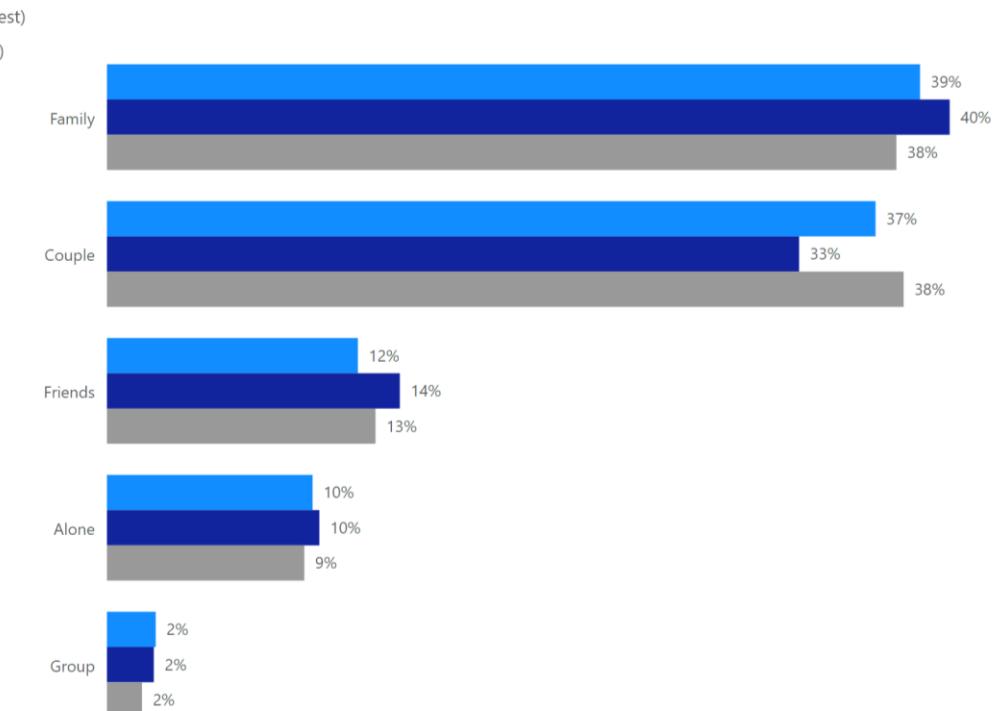
— Average European source markets, total vs. travellers interested in cycling and mountainbiking



General preference for visiting iconic vs. lesser-known sites



Travel party (*)



- Travellers interested in cycling show near equal shares in terms of preferences for visiting iconic vs. lesser-known sites and in terms of travel party when compared to all travellers.

(*) During last outbound holiday trip.

Source: LFT Brand & Potential Study, 2024.

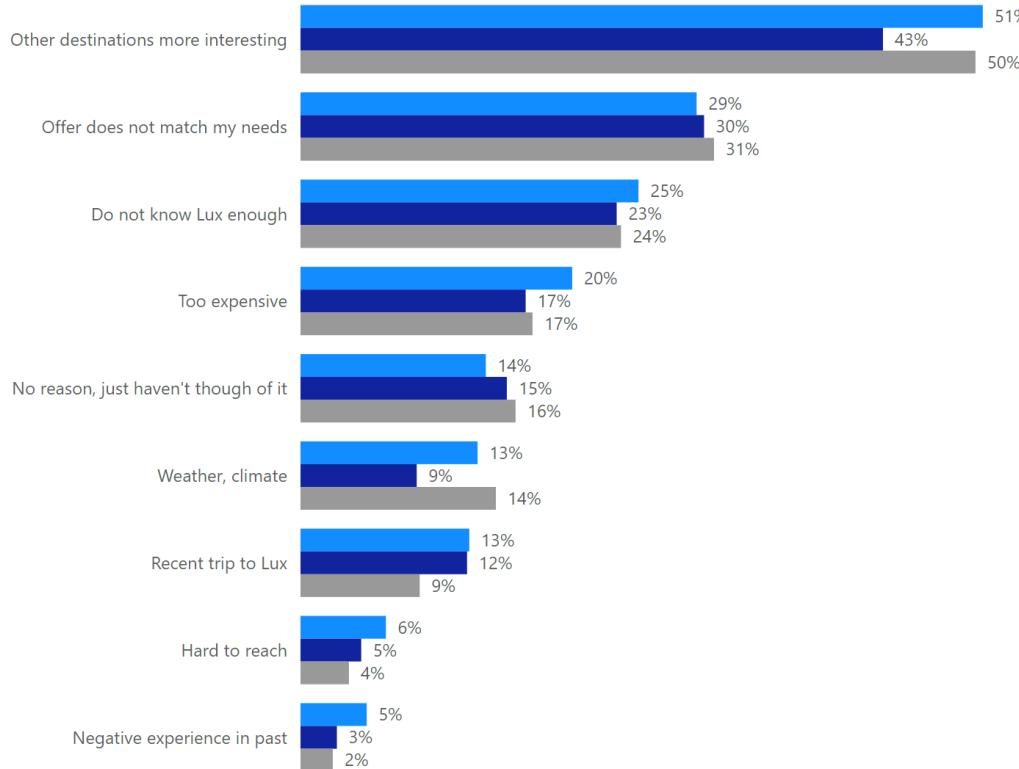


Trip organisation and preferences (4)

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

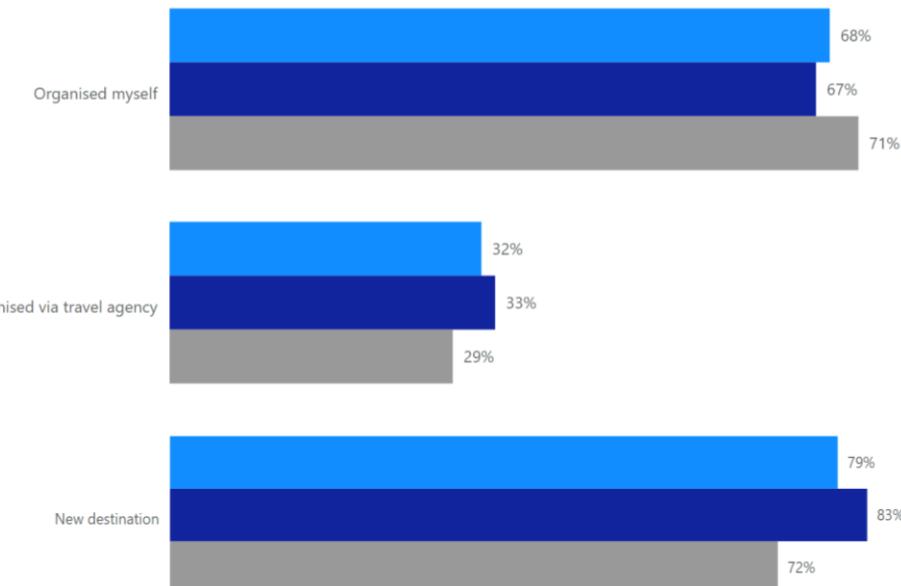
Reasons for not considering Luxembourg as a destination

- Cycling (interest)
- MTB (interest)
- Total



Self-organisation (*), new destination (**)

- Cycling (interest)
- MTB (interest)
- Total



- Recent trips to Luxembourg as well as the weather/climate and Luxembourg being too expensive are a little more often named as reason for not considering Luxembourg as a destination by travellers interested in cycling compared to all travellers.
- Self-organization levels are similar to total travellers while travellers interested in cycling show a higher share of visiting a new destination during their last outbound holiday trip.

(*) During last outbound holiday trip .

(**) During last outbound holiday trip: had travelled to a destination never visited before.

Source: LFT Brand & Potential Study, 2024.



Your contact

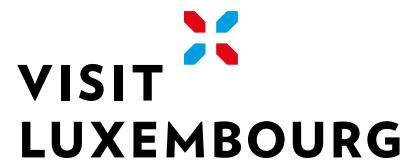


Alain Krier

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