Cycle Tourism Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Specialty, Niche & Experience Tourism (Hospitality & Tourism)
> **Source:** https://www.mordorintelligence.com/industry-reports/cycle-tourism-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 160.97 billion
Projected Forecast (2031)	USD 160.97 billion
Growth Rate (CAGR)	9.32 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Cycle Tourism industry](images/chart_2.png)

![Cycle Tourism Market (2025 - 2030)](images/chart_3.png)

![Cycle Tourism Market: Market Share by Group, 2025](images/chart_4.png)

![Cycle Tourism Market: Market Share by Booking Mode, 2025](images/chart_5.png)

![Cycle Tourism Market: Market Share by Age Group, 2025](images/chart_6.png)

![Cycle Tourism Market CAGR (%), Growth Rate by Region](images/chart_7.png)

![Cycle Tourism Market Concentration](images/chart_8.png)

![Icon](images/chart_9.png)

![footer background image](images/chart_11.png)

![Mordor Intelligence on Facebook](images/chart_13.svg)

![Mordor Intelligence on Pinterest](images/chart_15.svg)

![Mordor Intelligence on Instagram](images/chart_16.svg)

![ESOMAR](images/chart_18.png)

![GPTW](images/chart_20.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Market Size (2026) | USD 160.97 Billion |
Market Size (2031) | USD 251.43 Billion |
Growth Rate (2026 - 2031) | 9.32 % |
Fastest Growing Market | Asia Pacific |
Largest Market | Europe |

Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Cycle Tourism Market Analysis by Mordor IntelligenceThe Cycle Tourism Market size was valued at USD 147.24 billion in 2025 and estimated to grow from USD 160.97 billion in 2026 to reach USD 251.43 billion by 2031, at a CAGR of 9.32% during the forecast period (2026-2031).

Network-wide infrastructure spending, expanding e-bike fleets, and government sustainability mandates converge to lengthen average trip distances and compress booking windows into mobile-friendly transactions. Operators report stronger cross-selling of luggage transfers and premium lodging as travelers trade up for comfort on longer routes, while destination management organizations subsidize signage and safety amenities to capture spillover spending from adjacent leisure sectors. Consolidation remains limited because route knowledge, localized partnerships, and brand intimacy still trump pure scale advantages, although digital marketplaces narrow the visibility gap between global and niche brands. As a result, the cycle tourism market increasingly rewards differentiated itineraries such as culinary trails and corporate wellness retreats that command 18-25% higher per-capita spending than standard departures. The Asia-Pacific corridor, where governments link climate goals to active mobility, demonstrates how targeted incentives can compress years of demand buildup into a single planning cycle.

Key Report Takeaways

* By group type, couples held 35.82% revenue share in 2025, while solo travelers are projected to grow at a 12.15% CAGR through 2031.
* By booking mode, direct channels captured 56.63% of 2025 revenue in the cycle tourism market; marketplace platforms are forecast to advance at a 15.05% CAGR to 2031.
* By age bracket, participants aged 31-50 years accounted for the largest slice at 41.05% in 2025, but the 18-30 years cohort shows the highest 12.88% CAGR through 2031.
* By geography, Europe led with 43.10% of the cycle tourism market share in 2025, whereas Asia-Pacific is expanding at a 13.74% CAGR through 2031.

Key Market Trends

Global Cycle Tourism Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Expansion of dedicated cycling infrastructure	+2.8%	Global; EU and North America lead	Long term (≥ 4 years)
Rising popularity of e-bikes	+2.1%	Global; strongest in Asia-Pacific	Medium term (2-4 years)
Government sustainability initiatives	+1.9%	Europe and North America, emerging in Asia-Pacific	Long term (≥ 4 years)
Digital booking platforms and social media	+1.6%	Global; higher penetration in developed markets	Short term (≤ 2 years)
Bike-with-wine or food trails	+0.8%	Core in Europe, gaining ground elsewhere	Medium term (2-4 years)
Corporate wellness offsites	+0.5%	North America and Europe, early Asia-Pacific	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The cycle tourism market is highly fragmented, with the top five operators collectively holding just 16% of the total market share. This fragmentation opens the door for consolidation while also allowing smaller players to differentiate through niche positioning. Leading companies such as TUI Group (with a 4.2% share via Eurobike) and Intrepid Travel (3.7% share) benefit from economies of scale in route development, equipment sourcing, and marketing. However, smaller operators remain competitive by leveraging local expertise and focusing on specialized offerings. The diverse geography of the industry limits standardization, making destination-specific knowledge a key competitive asset. As a result, large-scale consolidation remains complex despite market share opportunities.

Technology adoption and vertical integration are emerging as key strategic trends among operators. Companies are increasingly investing in digital booking systems, GPS-enabled navigation, and e-bike fleet management to streamline operations and enhance customer experience. These technological advancements not only reduce costs but also help create more personalized and efficient tour offerings. Larger players use their scale to adopt these innovations faster, but smaller operators are also finding success with targeted tech solutions. Intrepid Travel’s $100 million acquisition of Sawadee Reizen highlights a consolidation strategy aimed at expanding geographic coverage and customer base. Meanwhile, G Adventures demonstrates an organic growth approach with the launch of 25 new Active trips planned for 2025.

Looking ahead, significant white-space opportunities are emerging in niche segments such as corporate wellness programs, gastro-cycling tours, and underdeveloped international markets. Companies that tap into these segments early can gain a first-mover advantage, particularly in regions where infrastructure is improving but established operators are scarce. Corporate wellness travel offers especially high revenue potential due to the growing demand for ESG-aligned, health-focused team experiences. Gastro-cycling, combining culinary tourism with active travel, also presents strong appeal for premium travelers. As infrastructure expands in emerging markets, there is increasing demand for operators who can provide reliable, high-quality experiences in less-explored destinations. These evolving dynamics point to a market ripe for innovation, specialization, and strategic expansion.

Cycle Tourism Industry Leaders* TUI Group (Eurobike/Eurohike division)

* Intrepid Travel

* G Adventures

* Backroads

* Exodus Travels (Travelopia)

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

For this study, the cycle tourism market covers traveler spending linked to leisure trips where cycling is a main activity. This includes guided and self planned itineraries, bicycle rentals, route services, lodging tied to cycling stays, and trip packages booked through tour operators or travel platforms.

Scope exclusions: We exclude daily commuting, bicycle manufacturing and retail sales, and purely competitive racing events that are not tourism led.

Segmentation Container

* By Group* Group/Friends
* Couples
* Family
* Solo

* By Booking Mode* Direct
* Travel Agent
* Marketplace Booking

* By Age Group* 18 to 30 Years
* 31 to 50 Years
* More Than 50 Years

* By Geography* North America* Canada
* United States
* Mexico

* South America* Brazil
* Peru
* Chile
* Argentina
* Rest of South America

* Europe* United Kingdom
* Germany
* France
* Spain
* Italy
* BENELUX (Belgium, Netherlands, Luxembourg)
* NORDICS (Denmark, Finland, Iceland, Norway, Sweden)
* Rest of Europe

* Asia-Pacific* India
* China
* Japan
* Australia
* South Korea
* South-East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, Philippines)
* Rest of Asia-Pacific

* Middle East and Africa* United Arab Emirates
* Saudi Arabia
* South Africa
* Nigeria
* Rest of Middle East and Africa

Frequently Asked Questions

What is the projected value of the cycle tourism market in 2031?

The cycle tourism market is expected to reach USD 251.43 billion by 2031, growing at a 9.32% CAGR from 2026.

Which region is expanding the fastest in cycle tourism?

Asia-Pacific leads growth with a projected 13.74% CAGR through 2031 as e-bike adoption and infrastructure budgets surge.

How large is Europe’s share of cycle-based travel revenue?

Europe accounted for 43.10% of global spending in 2025, underpinned by dense cross-border networks and supportive policies.

What booking channel dominates multi-day cycling holidays?

Direct booking channels hold 56.63% of revenue because travelers seek operator expertise on routes, equipment, and safety.

Which traveler segment is growing quickest?

Solo riders show the strongest momentum, expanding at a 12.15% CAGR through 2031 thanks to app-based navigation and flexible itineraries.