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Cycling tourism development research

Visit Wales



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Cycling tourism development research

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Available at: <https://www.gov.wales/cycling-tourism-development>

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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1. Summary

Strong desire to develop cycling tourism in Wales

Stakeholders are very keen to see cycling tourism developed in Wales. It is a significant generator of overnight stays in some counties. Where stakeholders have a remit / interest in promoting other destinations and not just Wales, they are interested in the success of Wales as a cycling destination because they believe in its potential.

The accommodation industry is also supportive, with an estimated 43% of providers in Wales describing cycling tourism as 'important' to the future of their business.

If this is a product area which Visit Wales decides to prioritise, it starts from a base of having many willing and cooperative stakeholders.

Appealing product

Stakeholder feedback and the desk research show that to a large extent, the product required to attract cycling tourists already exists in Wales. There is an extensive network of cycle routes and mountain bike trails. The landscape in Wales is varied and scenic, making it highly attractive for cycling tourists.

Many (47%) accommodation providers believe that 'nothing' is missing from their local area for visiting cyclists.

England is a crucial market

The UK outside of Wales, primarily England, is a crucial market for cycling tourism in Wales. Almost all (99%) accommodation providers who receive visiting cyclists say that the UK outside of Wales is one of the main markets. This is also supported by stakeholders.

Demand by season

Spring and autumn offer strong demand for cycling in Wales. This is a key benefit of cycling tourism: it fills beds at times of year when there is spare capacity.

Product improvements needed and the barriers

The emphasis is more on improving and maintaining better the product that currently exists rather than necessarily building a considerable number of new routes and trails. The National Cycle Network in Wales is now around 30 years old and some surfaces are starting to deteriorate.

For any new cycle routes & trails, access to land is a key barrier. There are no longer the same financial incentives to offer landowners compared to when the National Cycle Network was first developed.

What are the opportunities?

For all types of cycling, stakeholders feel there is significant growth opportunity in attracting more women and families. Cycling has traditionally been a male-dominated sport, but numerous stakeholders are now trying to move perceptions away from cycling being about 'men in Lycra'.

Women and children are more likely to favour shorter, less strenuous routes and want other things to look forward to enroute besides just cycling all the time. Wales is felt to offer this more leisurely experience with its attractive scenery and places to visit.

The market for e-bikes is growing very rapidly and it offers significant opportunities to attract a wider range of cyclists, primarily those less physically able and newcomers to the activity. There are significant challenges in cost, insurance and safe charging points.

Cycling events can be a catalyst for marketing cycling in Wales.

2. Background and method

Why has this research been commissioned?

Visit Wales aims to identify special interest tourism products with potential for future growth. Internal discussions have identified cycling (road, mountain and gravel) as a product which fits with Wales' core offer, aligns with the brand vision (in particular, natural landscapes and adventure/activities) and contributes to wellbeing aims set out in strategies such as the [All-age Mental Health Strategy and Wellbeing Strategy \(Welsh Government\)](#), and [Working Together for a Healthier Wales \(Public Health Wales\)](#), as well as the [Wellbeing of Future Generations Act 2015](#). Cycling is also thought to offer good potential in the shoulder seasons, which would align well with Visit Wales' aims to grow tourism outside of the peak summer season.

Visit Wales commissioned Strategic Research and Insight (SRI), an independent Cardiff-based research agency, to undertake research with the tourism industry, cycling providers and key partners. The main objectives are to understand:

- Capacity for cycling tourism and current demand
- Strengths and weakness of the current cycling tourism offer
- Barriers and opportunities to grow cycling tourism

How has the research been conducted?

Primary research has been conducted in two phases:

- Qualitative research with cycling providers and key partners
- Quantitative research with tourist accommodation businesses

This was accompanied by secondary desk research. The research phases are described below.

Qualitative phase

Visit Wales identified cycling providers and key partners to approach for a depth interview. Depth interviews are a form of qualitative research, which is fluid by nature and does not follow rigidly scripted questions like a questionnaire used in quantitative research. The purpose is to explore depth rather than breadth. Interviews can last around half an hour. SRI conducted a total of 20 depth interviews, spread across a range of organisations:

- Public bodies (7)

- Bike parks (3)
- Cycling tour operators (5)
- Cycling event organisers (3)
- Cycling charities (2)

Feedback from these key stakeholders is discussed by theme in sections 3 to 6. Topic guides are available on request.

Quantitative phase

Following the qualitative phase, SRI conducted 300 quantitative telephone interviews with tourist accommodation providers in Wales. Quantitative research measures breadth using a large sample size and serves a different purpose from qualitative research, which explores feedback in greater depth.

Visit Wales provided contact data for graded accommodation in Wales. This was supplemented with non-graded accommodation from an industry database broker.

To qualify for interview, the respondents had to confirm that cycling tourism is of some relevance to their business. Details of businesses that did not consider cycling tourism to be relevant were recorded in order to compile an estimate of the current accommodation supply side in Wales.

The final qualifying sample of accommodation businesses that feel cycling tourism is relevant to their businesses is as follows:

Table 1: accommodation research sample by sector and region

Sector / Region	North	Mid	South West	South East	Total
Serviced accommodation	52	25	38	19	134
Self-catering	32	27	24	14	97
Caravan / campsites	19	11	15	5	50
Hostels	8	2	6	3	19
Total	111	65	83	41	300

Within the sample, there are 125 businesses which have ‘Cyclists Welcome’ accreditation. In Wales, this is a scheme which runs as part of [Visit Wales’ wider star grading scheme](#) and it aims to support businesses in developing their product offering for cycling guests.

The quantitative findings are discussed in section 7. The questionnaire is available upon request.

Desk research

Natural Resources Wales (NRW) provided count data for mountain bike rides at its sites and this is summarised in section 5.

3. Road and traffic-free cycling: current situation

This section of the report is based on qualitative interviews with stakeholders and the supplementary desk research. Quotations are attributed to the type of stakeholder. Interpretative commentary is based on the general views of stakeholders relevant to that sub-section, unless stated otherwise.

Importance of cycling tourism

All stakeholders value cycling tourism in Wales highly

Cycling tourism matters a lot to the local authorities that have participated in this research. It forms part of Destination Management Plans and events strategies. It is a key generator of overnight stays in some counties.

“Cycling tourism is the biggest generator of overnight stays in our county”

Public body

Where stakeholders have a remit / interest in promoting other destinations and not just Wales (e.g. tour operators whose tours include other nations), they are all interested in Wales as a cycling destination because they believe in its potential to be successful in attracting high levels of cycling tourists.

Overlap with other cycling agendas and investment

Cycling tourism also overlaps with active travel / health and wellbeing aims of Welsh Government and local authorities for local populations. This means that investment has been made in infrastructure intended for use by local residents, which tourist cyclists can now also benefit from.

“We have developed specific cycling routes to target visitors and residents. We’re keen to ensure people keep fit and healthy, in line with the Health and Well-being Act [sic].”

Public body

“We’re trying to get locals to ride their bikes and make it a cycle friendly area for everybody ... if it’s a more cycle-friendly area then our visitors will see that as well”

Public body

Quality of current product in Wales

Stunning and varied landscape

The consensus is that Wales has a highly attractive landscape that few other destinations can match. In order to be a competitive destination for cycling tourism, routes need to be scenic.

Many good quality off-road routes

Wales already has a wide range of off-road cycle routes covering much of the country.

Popular routes include:

- Taff Trail (Brecon to Cardiff Bay). This is frequently used for events and sponsored rides
- Traws Eryri (Gwynedd)
- Ffordd Brailsford Way (Gwynedd)
- Mawddach Trail between Dolgellau and Barmouth (Gwynedd)
- North Wales Coastal Route (Holyhead to Chester). Sections are popular but the route has suffered from coastal erosion; currently there are many diversions
- Brunel Trail (Pembrokeshire)
- Parts of the Celtic Trail across South Wales to Millennium Coast Path (Carmarthenshire) and Swansea to Kidwelly

Carmarthenshire also has a new route: Tywi Valley, opening in 2025. Conwy has attracted £18.6m Levelling Up funding for a Coast to Valley Active Travel route in the Conwy Valley, for use by both residents and visitors.

Numerous good quality track products

Wales also has track products such as velodromes in Carmarthenshire and Newport, and the National Closed Road Cycling Circuit in Carmarthenshire. Whilst some facilities are not primarily concerned with tourism, this infrastructure helps to develop elite cyclists in Wales, which in turn could strengthen the perception of Wales as a cycling nation. Current world champion and Olympic gold medal winning track cyclist, Emma Finucane, and former elite cyclist, Manon Lloyd, both grew up using these facilities in Carmarthenshire.

Wales offers wider tourism opportunities

Some feel that Wales' quality cycling offering is not just due to the cycling product, but also the destination offers many other tourist attractions and places to visit. One participant says the tourism potential is not just from outside Wales, but within Wales too.

“Tourism isn't just about what outsiders coming into Wales think. It's about educating and letting Welsh people know that actually on their doorstep they have the most incredible opportunities.”

Public body

Some say that accommodation currently meets the needs of cyclists

Views on the appropriateness of accommodation in Wales vary, and views on improvements needed are discussed in section 4. Some stakeholders however feel that accommodation in Wales is adequate for the needs of cyclists.

20mph speed limits

The widespread introduction of 20mph speed limits in Wales has caused a lot of negative reactions among tourism businesses. Some businesses claim that this puts off some English visitors from coming. This has been reported in the [Tourism Barometer report for February 2024](#) and [Tourism Barometer: June Wave, 2024](#).

For cycling however, 20mph can be a positive as it makes some stretches of road safer.

“The 20mph speed limit for slowing the traffic down is so beneficial to cyclists”

Charity

One event organiser however says the 20mph limits have caused problems with road cycling events.

“We're having to find routes where you don't go through 20mph zones. We try to get exemptions for the big road race. The convoy would go ahead and then put the brakes on and then the cyclists would come through.”

Public body

Weaknesses in the current product in Wales

The general view is that the current product in Wales for road and off-road cycling is strong. The suggestions below should therefore be read in this context, and that improvements needed do not imply a fundamental overhaul of the product.

Roads can be unpredictable and not always cyclist-friendly

Road cycling requires good smooth surfaces without potholes, and courteous drivers who show respect to cyclists. This can be an issue in places.

Deterioration in some cycle path surfaces

The National Cycle Network has now been in place for around 30 years, and some surfaces are in need of repair. Stakeholders have mentioned that with extreme weather events seeming to become more frequent with climate change, it can be hard to keep up with the repairs, especially around coastal areas.

“There is investment needed because we have a 30 year old network and some parts now need improving. The surface deteriorates and there’s a constant need for signage and in the past, the network has suffered from access barriers.”

Charity

Network lacking in North East Wales and some parts of Mid Wales

Whilst the National Cycle Network in Wales is extensive, one participant feels that it is lacking in North East Wales and that this gap needs to be ‘filled’.

“There are about four or five gaps up to the border with Cheshire and across to the Bala area which need to be filled in”

Charity

Not enough circular routes

One tour operator struggles to make cycling tours in Wales sustainable because they prefer circular routes to linear ones, which in their case means arranging transport for one direction of the route.

“It works ok in groups when you have a tour bus to transport everything but it never works out especially green”

Tour operator

Some obstacles to becoming Cyclists Welcome accredited

Some businesses apply for Cyclists Welcome accreditation (as discussed under Table 1) and already have the required services and facilities in place. Other applicants do not and give up on trying to meet the requirements. There are some businesses who struggle with

smaller services such as providing first aid and puncture repair kits because they go missing and there is a cost to continue replacing them. Stakeholders say these issues are a barrier to increasing the number of accredited accommodation businesses.

“Maps, guides, puncture repair kits and items from the first aid kit regularly go missing. The cost of having to maintain and replace items deters businesses from applying.”

Public body

Current markets and levels of usage

Cycle network usage

Feedback from Sustrans estimates that approximately 45 million cycle trips are taken annually on the National Cycle Network in Wales (some routes are used by commuters as well as leisure or tourism cyclists). The most popular section is the Taff Trail (which runs between Cardiff and Brecon).

England is the key market

Feedback from tour operators shows that the England market is key for cycling tourism in Wales. One operator says that this market accounts for around 80% of their visitors to Wales. As well as attracting visitors from other parts of the UK, Wales also attracts cycling tourists from nearby European countries and long-haul English-speaking countries (e.g. USA, Australia).

In South Wales, the largely populated M4 corridor including Cardiff, Bristol and London is a key source of visitors.

Event organisers say that cycling events taking place in Wales also attract a large proportion of participants from England. Certain high profile events such as the UCI Gravel World Series, which has a race in Denbighshire, have a greater reach and attract many participants from Europe and other continents.

Strong shoulder season demand

There is considerable demand for cycling through the spring and autumn. It does not have the same significant summer spike in demand that some other parts of the tourism offering have (e.g. beach holidays).

Accessibility needs

Access controls hindering some types of bike user

Some parts of the National Cycle Network in Wales have access controls which make it difficult for users to get their bike through: for instance, tandem bikes. Less physically able cyclists may also struggle with some access controls. One stakeholder says that there are ongoing efforts to get these access controls removed, on the basis of the Equality Act 2010.

Some flat, traffic-free routes for less physically able cyclists

Wales offers a number of flat routes which are attractive to cyclists looking for a less physically challenging experience. Some routes follow disused railway lines, and these offer a more accessible experience.

“More funding for developing disused railway lines could result in high quality routes for tourists”

Charity

“Disused railway lines have been transformed into more recreational routes. These are very popular with visitors. They’re suitable for all: people with disabilities and families.”

Public body

Families with young children tend to cycle shorter distances and need things to do

If on a tour, organisers will take into account the needs of families with young children. They are more likely to need relatively short distances and other things to do enroute besides just cycling. Stakeholders on the whole feel that Wales offers this.

Cycling tours

Overview of what operators offer in general

Cycling tours (holidays) can be guided or self-guided. If a tour is aimed at more casual cyclists, the routes are more likely to be on paths or quiet roads and include visiting attractions compared to tours targeted at more experienced cyclists on roads. On the more ‘leisurely’ tours, tour operators often view cycling as a means of showing visitors the destination rather than being just about the cycling itself. These leisurely tours sell particularly well.

“You’re getting the full Pembrokeshire experience in a really fun, unique way. We’re trying to break down the idea that cycling is men in Lycra.”

Tour operator

Guided tours tend to have a support van for transporting luggage and picnic lunches.

On self-guided tours, operators may recommend points of interest and places to eat enroute. One operator uses an app called ‘Ride with GPS’ to do this.

The suitability of cafés recommended is as much to do with the quality of the food, service and general customer reviews as the facilities for cyclists, as they only really need a place to secure the bikes, and this is normally taken as a given unless the café is in a town centre. Operators work with partners for luggage transfer.

Tours can either be linear or based on one or a few centres.

What is needed in accommodation?

Tour operators state that secure bike storage is key if an accommodation provider is to be considered by operators. E-bikes are becoming much more popular and so safe (i.e. outdoor) charging points are needed. This is because they present a fire risk (Department for Transport, [E-cycle and e-scooter batteries: managing fire risk for premises](#)).

“Bike storage is the main absolute must”

Tour operator

Otherwise there are a few other services / facilities which can tip the balance towards the accommodation being chosen, but they are not necessarily deal-breakers, depending on whether the operator has better options in the area. These include flexible meals, a place to clean bikes and a repair station.

“Once customers arrive at a destination, ideally we wouldn’t want them having to leave again [in search of dinner]”

Tour operator

“If a place offers somewhere to clean bikes, a repair station, we are much more likely to consider that accommodation than somewhere else”

Tour operator

With some markets such as North America, there is more emphasis on high quality ‘boutique’ style accommodation. Comfort is key.

What are the core markets?

Cycling tour customers are often aged over 40. Men are attracted to the activity, but women also go on cycling tours, especially if they are travelling with their male partner. One tour operator is very keen to move perceptions of cycling away from sporty men.

“It’s not about being a wiry, muscly toned male. It’s for anyone who can ride a bike. They can go off road, see some stunning countryside and come back with an adrenaline buzz.”

Tour operator

What do operators think of the offering in Wales for cycling tours?

In short, Wales has a great product but it is not promoted well enough. The beautiful and varied natural landscape makes it ideal for a cycling holiday destination, but the lack of demand means that some Wales tours have been pulled from operator portfolios.

“We have minimum numbers of five or six people and the trip [to Carmarthenshire and the Brecon Beacons] didn’t reach minimum numbers to go ahead. There’s a cost involved of keeping a holiday going and we just weren’t getting the bookings so we rested that holiday. It was nice landscape, nice hotels.”

Tour operator

Some potential visitors are also thought to be put off because they think that Wales would be too hilly for leisurely cycling.

A few issues with the ‘supporting’ product

Whilst the core cycling product (routes and surfaces) is perceived well by operators, some comment that supporting product such as suitable accommodation, bike-friendly transport and food & drink places can be lacking in some areas.

One tour operator which targets the North American market also says that there is a lack of ‘boutique’ style accommodation expected by this market. There are also issues with getting suppliers such as attractions to commit to receiving tours far enough advance for when these long-haul tours are being planned.

“The first thing we do is look to see what luxury accommodation there is, where it is, and work back from there. In Wales there are so few. It’s a seriously limiting factor.”

Tour operator

“We’ve lost bookings in the past because our tour hinges on being able to use an attraction on a certain day at a certain time”

Tour operator

Accessibility needs

Tour operators can accommodate different needs by having shorter cycling legs and things to do other than cycling for children, booking tandem bikes for the partially sighted, and planning ahead with routes and accommodation choices for other needs. Tour operators who believe they have sufficient knowledge of Wales generally feel they could accommodate these needs in Wales, particularly finding interesting things to do enroute besides cycling.

Cycling events in Wales

Some high profile races

Cycling event organisers have given some examples of recent high profile cycling races in Wales:

- UCI Gravel World Series
- Tour of Britain (men)
- Tour of Britain (women)

High profile races tend to attract younger (fitter and more competitive) cyclists, and they can come from all over the world. Some may come to Wales beforehand to train on the route.

There are also fewer high profile races which tend to attract participants from all over the UK and sometimes from other countries. Some participants may do a cycling tour of Wales whilst in the country.

Some events are non-competitive

Some cycling events bring cyclists together in one place but the event is not competitive. Examples include:

- Carten100 (Cardiff to Tenby)
- Daffodil ride: starting from Llandovery in Carmarthenshire
- Tour de Môn (Anglesey)

The core market for non-competitive events tends to be men aged about 45 to 65. The reason for the relatively 'older' age is that many men drop out of travelling for cycling events when they have children and then return later in life when they have more time and freedom.

Some organisers are trying to attract more women.

"I feel there are more women cycling, but they're not taking part in events"

What are the benefits of events to the destination?

Some organisers say that accommodation and restaurants in the local area are fully booked during the time of the event. One organiser feels that the value of the event they bring is not understood by the local authority.

“To bring a world class event to a destination, we need buy-in from the local council and tourist board. For some reason in Wales, there’s no appetite for it. It’s like trying to push water uphill ... There’s so much benefit to the local economy. All the hotels are full for miles around. You can’t get a table in a restaurant the night before or the night after.”

Event organiser

Seasonal demand

Spring and autumn have strong demand. Winter is harder if on a surface such as gravel because events work better when the ground is firmer.

The summer holidays are not peak time for events because some cyclists are spending time away with their own families. Forest trails are also quieter outside school holidays and so events which use them are usually timed to take advantage of this.

Can be used as a catalyst for future focus

Some local authorities in Wales value cycling events in their county highly. Funds may be used to promote cycling in the county whilst the event is attracting attention.

“Events are a strategic priority. They create a buzz in the community.”

Public body

Accessibility needs

Organisers of non-competitive events can accommodate accessibility needs with e-bikes and some shorter routes.

4. Road and traffic-free cycling: future development

This section of the report is based on qualitative interviews and supplementary desk research. Quotations are attributed to the type of stakeholder. Interpretative commentary is based on the general views of stakeholders relevant to that sub-section, unless stated otherwise.

Promotion, opportunities and targeting

Promotion is needed more than product development

Some product improvements are needed, and these are discussed later in this section. However, the general view is that the biggest single weakness of the road & traffic-free cycling offering in Wales is the lack of promotion rather than lack of product.

“Our research shows this is not a ‘build it and they will come’ environment.”

Charity

“The sky is the limit. The landscape is so varied, so amazing. The opportunities exist from family off-road cycling in flattish forests to full-on steep hills for mountain biking.”

Charity

“How do we connect all the different parties to put that information into a portal? I think it would change the nature of cycling in Wales. People would know in three or four clicks that they can go somewhere, there’s a 10k route, they won’t hit traffic, it’s safe, there’ll be cafés on the way.”

Public body

Delighted to hear Visit Wales is investing time in this area

Conducting this research demonstrates to stakeholders that Visit Wales is at least looking into cycling tourism as a possible priority for the future. Whilst they understand there are no promises it will be prioritised, they are keen to work with Visit Wales if it is.

“This is 12 months a year for us. We’re really, really pleased that Visit Wales is looking into this.”

Public body

“It’s mostly on us to promote it, but it would be very helpful if we could join with Visit Wales, as we often do with ‘Visit Yorkshire [sic]’ for example”

Tour operator

“On Facebook and Instagram you can do collaborations now. It would be a really quick and easy way to promote cycling in Wales. If there were specific

campaigns we could link with Visit Wales, it would help market to a new area.”

Event organiser

Raising awareness of what Wales already has

There is a perception that Wales is missing out on some opportunities because consumers and sometimes businesses (operators outside Wales and accommodation businesses in Wales) are not fully aware of the cycling product it already has.

“We’ve got a sales job on our hands to tell our accommodation providers about the cycling product we have so they can then tell their customers”

Public body

“I don’t think we do a good enough job about how we communicate and signpost and make it really easy for people to know: where can I go? I’ve got two kids, I don’t want to take them on the road, I want them to be on a safe route.”

Public body

There are also some perceptions among consumers that Wales is too hilly for leisurely cycling. Raising awareness that there are flatter routes available is important for overcoming this perception.

“When people think of Wales for cycling, they might not consider it as being more leisurely”

Tour operator

Opportunities for joining up towns and themed experiences

One key role for Visit Wales is felt to be the joining up of the core cycling routes with the attractions and places to visit. This would package the whole offering into a defined cycling holiday experience which can be promoted by Visit Wales and public and commercial partners.

“There’s a huge opportunity to promote long distance touring and themed cycling experiences”

Charity

Joined-up approach with Cyclists Welcome accreditation

As well as joining up cycling routes with attractions and places to visit, some stakeholders would also like to see coherent promotion of Cyclists Welcome accredited accommodation. The quantitative findings with the accommodation business survey in section 7 show that many accredited businesses do not feel they are seeing any benefit from being in the

scheme. Visitors may not know about the scheme or where to find accredited businesses, even though some accredited businesses network and provide routes.

“Businesses can network and provide routes if they’ve been accredited”
Public body

New markets

Some see the growth potential for Wales lying in market segments which are not currently the highly experienced cyclists who go on cycling breaks regularly (typically groups of men), but those who would be more interested in a leisurely experience with other things to do/see besides just cycling. Families and women-only groups are suggested as wanting this leisurely experience.

“We’ve formed a partnership with Breeze. It’s a network of like-minded women who want that female-only space. Volunteers lead a ride on a safe route; they can have coffee and cake halfway through.”
Public body

Expansion of events and tours

Some event organisers and tour operators are keen to expand their offering in Wales if the barriers can be overcome, discussed later in this section under barriers to development.

“We are hoping to recce the Traws Eryri and trans-Cambrian route next year ... we’re pretty hopeful to have a product in 2026. We’re very aware that we don’t have a product in Wales currently and are keen to get something that’s sellable and profitable.”
Tour operator

“We want to go from two events in Wales to six, seven or even ten, offering people new experiences in all different places”
Event organiser

Events can be used as a catalyst for growing cycling tourism, and this can be done all year round.

“Events help to shine a light on a destination. They are already in Wales, where a huge amount of money has been spent on developing new trails, but nobody really knows about them.”
Event organiser

Product needed

Aging network needs improving

Stakeholders feel that whilst there are opportunities to add to the network of cycle paths and cycle-friendly roads, Wales already has an extensive National Cycle Network and this needs investment. Improvements needed in some places are surface repairs, signage, removal of access barriers and the completion of 'niggly' parts of routes which temporarily move onto roads.

Families need a reliable experience, and these improvements are needed to guarantee them that.

“Young families want predictability. That’s what is missing at the moment. We can’t always guarantee that cyclists are going to have that high level experience across the whole network.”

Charity

Where new routes are desired, as mentioned, more circular routes and more routes in North East Wales could improve the network. Disused railway lines can make accessible routes for all abilities.

Cycle-friendly accommodation for events and some tours

Whilst some stakeholders feel there is sufficient cycle-friendly accommodation, one tour operator and a few event organisers feel that it is lacking in important places.

Accommodation is in high demand in the area around an event and so the supply would be able to meet the demand better if more of the accommodation establishments within the event area were cycling-friendly.

Bike carriages on trains

Whilst train facilities for bikes are increasing, some say this needs to keep increasing. This can help with linear routes, as unless overnight cyclists plan to move onto different accommodation the next night, they need a way of getting back to base. It can be a long way back for families. Public transport also helps to make events more sustainable.

“People can’t come to our events [in Wales] on public transport. Trains don’t allow enough bikes.”

Event organiser

Bike hire: especially e-bikes

If more 'leisurely' cyclists are attracted to Wales and cycling is just part of the holiday activities, there will be an increasing need for bike hire. This is currently felt to be lacking in many places.

"It's really missing"

Public body

One local authority says that commercial bike hire companies have explored this and have not been convinced there is currently enough demand for commercial viability. The authority is now planning to use money from a related project to part-fund a commercial partner so that commercial providers can see there is a critical mass of demand.

E-bikes are a great way of attracting more people to cycle. They help to overcome hills (a barrier for many who are less fit / keen) and keep senior cyclists going further into old age, although they are not a complete solution if the rider lacks bike-handling skills.

"We were a bit limited a few years ago in terms of how far the bikes could go, but now we have some e-bike only departures for all of our trips, and e-bikes are about 50% of our leisure trips"

Tour operator

"I think this is where the industry is going. One of the biggest barriers to getting people into cycling is just the effort that it takes, especially in hilly areas."

Charity

"We don't want to say to people, 'just jump on an e-bike and you can cycle anywhere' because Wales is really hilly and you still need bike-handling skills, particularly when descending"

Event organiser

"It opens up Wales to the gentler cyclist. It wasn't until e-bikes came along that we considered Wales for cycling."

Tour operator

However, e-bikes are expensive and the cost prohibits some cyclists from buying them. There is a growing market for hiring e-bikes but suppliers may also face complications with cost and insurance.

"Providers get nervous about covering the costs of insurance and maintenance for e-bikes"

Public body

E-bike charging points

Following on from the above, the growing demand for e-bikes means that charging points are needed. They are a fire risk indoors and so charging points need to be outdoors.

Barriers to development

Access to land for new routes

If new cycle routes are to be developed in Wales, one stakeholder points out this is currently harder than when the National Cycle Network started. Access to land was easier then because financial incentives were available for route developers to offer to land owners in return for allowing access to their land. Similar support would be needed again.

“Land ownership and access is the single most difficult situation. For any new routes, there isn’t the level of funding available for land acquisitions ... Some kind of land fund from Welsh Government or a central source would be helpful. Without being able to offer some incentive to landowners in return for any changes they make for access, it’s very difficult to take the plans for a new route forwards.”

Charity

“There’s about a mile and a half [of land] that we’re struggling to get permission for. It’s ongoing and painfully slow. It would make a fantastic circular ride that takes into account two of the routes we’ve already got established.”

Tour operator

On a similar note, land owners sometimes put up access barriers and this can be restrictive for cyclists with accessibility needs.

“A lot of overseas tourists complain about parts of the network when they come across access controls that they’re not used to on European networks. These could be bridle controls, or frames which narrow at the top so you can’t get handle bars through to stop motorbikes. With any larger bike such as a tandem, you can’t get those through.”

Charity

Access to routes and exclusive use of roads for events

Planning a cycling event is complicated because organisers have to plan the route very carefully. They need guaranteed access if the route goes off-road and they are not always granted this. It is felt that public authorities could help here.

“Landowners are very hard to deal with. It’s difficult getting permission to use the land for an event.”

Event organiser

Organisers also need exclusive access to some roads or parts of roads, meaning they need to be closed or limited for traffic. One organiser says they are aware this can be frustrating for local residents and so they feel it is important that the value of holding cycling events is promoted to the local community to appease any negative feelings.

“People don’t want to get stuck behind 1,000 cyclists ... It would help to have support from Visit Wales and local authorities to get the message across about how important the events are to North Wales and the local economy”

Event organiser

“Consultation [on events] with the local community is key, especially in the more popular areas”

Public body

Focus on urban areas for Active Travel can hinder route development in rural areas

Active Travel grants have been good for cycling tourism in many ways because cycling product built primarily for local residents and commuters can also be used by tourists. However, the focus on developing cycling product in urban areas for locals means it can be harder for the more remote rural areas to gain access to grants.

“Urban areas have benefited from improved networks but there definitely needs to be a rebalancing of funding towards rural areas, which can be very attractive for tourists. A rural network that would be very strong in terms of tourism but less so in terms of utilisation is less able to win funding because of the scoring mechanism [in assessing bids].”

Charity

Rising cost of events and limited funds to promote them

Some cycling events are organised by small companies. They are grappling with the rising cost of organising them and the decline in sponsorship opportunities. Events need promoting if they are to grow, and small companies usually lack the budget to do this as well as they would like. Some small tour operators are in a similar position.

“The cost of hiring traffic management services, road closures, barriers, food. It’s all going up”

Event organiser

“Lots of small businesses start up and because they haven’t got the marketing support, they don’t go very far”

Tour operator

“Some of the larger events companies have folded. Any event that has relied specifically on funding and sponsorship is struggling.”

Event organiser

Efforts to increase interest across different ability groups can result in further costs for events. This is because ideally, organisers need to be able to offer different routes to accommodate the various abilities, but this adds to the cost.

“We get some riders complaining it’s too hard. We’ve made the events a bit easier and then you get complaints that it’s become too easy. Getting the balance right is difficult.”

Event organiser

Beicio Cymru not able to ratify events

One event organiser says that Beicio Cymru (formerly Welsh Cycling) and British Cycling are not able to ratify cycling events in Wales and so they have to apply to Welsh Government for approval. They find the process too time-consuming for a small company.

“Welsh Cycling [sic] are not able to ratify the events we do so we have to go through a third party”

Event organiser

5. Mountain biking: current situation

This section of the report is based on qualitative interviews and supplementary data provided by some of the stakeholders. Quotations are attributed to the type of stakeholder. Interpretative commentary is based on the general views of stakeholders relevant to that sub-section, unless stated otherwise.

Quality of the current product in Wales

Ideal natural landscape

Wales is believed to have the ideal natural landscape for mountain biking. It is hilly, varied and predominantly rural. There are numerous bike parks and there is room for more should the product offering be expanded.

“Wales lends itself perfectly to bike parks due to natural landscapes and good connectivity [to England]. We have fantastic trails.”

Bike park

Facilities at bike parks

Bike parks tend to cater well for the users and facilities at some parks include bike wash, showers, tool stations and a café. One operator mentions that onsite cafés are not always profitable due to rising employment costs.

Some accommodation is well set up for mountain bikers

In some areas close to bike parks such as in parts of Mid and South West Wales, accommodation operators close to those parks have learned how best to accommodate mountain bikers. One aspect of this is not being ‘too precious’ about having mud coming into the accommodation.

“Some accommodation providers allow guests to keep bikes in their rooms because they understand the value of the bikes”

Public body

“Accommodation needs to be not too precious and accommodate a bit of mud”

Bike park

Weaknesses of the current product in Wales

Facilities lacking in some areas

Away from the core bike parks in Wales, there are other areas which have mountain bike trails but don't necessarily have some of the supporting facilities such as toilets and cafés.

Suitable accommodation in North Wales

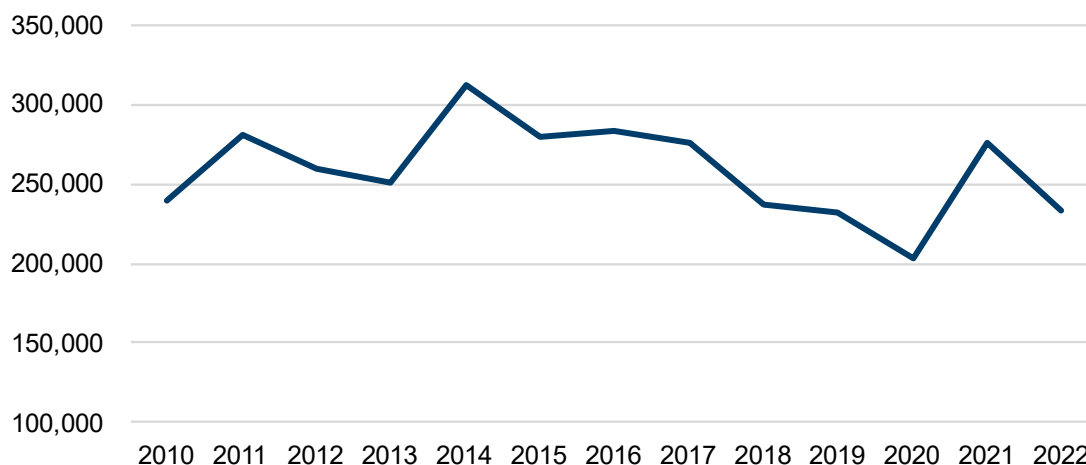
One mountain bike tour operator struggles to find sufficient suitable accommodation North Wales. They feel there is a lack of accommodation which can host larger groups and provide facilities for storing and washing bikes.

“It's difficult for the accommodation to take on our numbers. We have to limit it to 8 people only. We use a really lovely independent hostel in Dolgellau. It can sleep a few more than 8 but they can only take 6 bikes in their store ... we don't want to have to spread people about in different places. We like to keep them all together.”

Tour operator

Current demand / markets

Figure 1: Total rides per year on NRW mountain bike trails

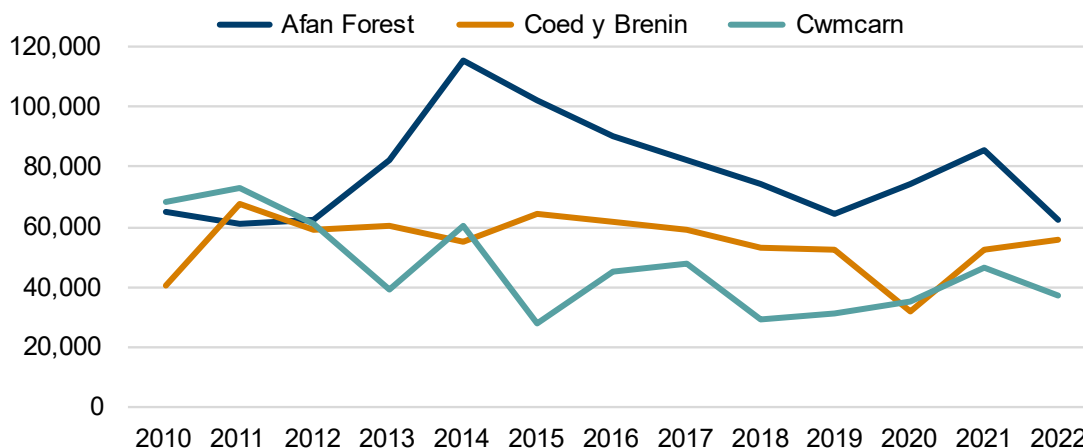


Source: count data from NRW. Data collection stopped after 2022 due to budget cuts.

Rides on NRW mountain bike trails in Wales peaked at just over 300,000 in 2014. This has been followed by a decline in numbers over six years, a sharp rebound after COVID-19 restrictions were lifted, and then further decline in 2022.

The large declines in numbers between 2014 and 2022 have mostly been seen at two of the three most popular sites: Afan Forest (down by nearly 50% from 115,717 rides in 2014 to 62,578 in 2022) and Cwmcarn (down by about 40% from 60,295 to 36,866), see chart below. Key reasons for decline are thought to include route closures due to felling, commercial competition, and the significant growth in unauthorised trails. In contrast, visitor numbers at Coed y Brenin in 2022 were virtually the same as in 2014.

Figure 2: Total rides per year on top three NRW mountain bike trails



Source: count data from NRW. Data collection stopped after 2022 due to budget cuts.

Mostly men and boys

Users of mountain bike parks in Wales are mostly male: one operator estimates 80%. Men and boys either come in groups and the ages range from teenagers up to men in their 50s, or they are fathers coming with their teenage sons.

One operator says they do see some mothers and daughters, but fathers and sons are much more common. Others say they are trying to attract more women. Currently, women visiting tend to be experienced riders.

“We have plenty of women and kids riding, but they’re experienced. The youngest are 9 to 10.”

Bike park

“Encouraging more women into the sport is hugely important to us and we have our own initiatives such as women community groups, social rides and events that are women-specific ... it’s hard work but we feel like we’re doing what we can.”

Bike park

Accessibility needs

One operator says they offer mobility carts for transporting riders with limited mobility to the top of the routes.

Many overnight visitors

About 40% of visitors to Dyfi Bike Park stay overnight, and about 55% of visitors to BikePark Wales stay for two or more nights. Mountain bikers come to Wales from all over the UK.

Overnight visitors stay in a mix of accommodation. Some are described as quite 'hardy' and sleep in their own campervans or other vehicles.

"They're quite a hardy demographic"
Bike park

Others seek familiar brands of chain serviced accommodation, which can sometimes mean Wales misses out on the overnight spend when bikers stay overnight just over the border in England. Some bike parks have links to local accommodation on their website.

Capacity can be reached at weekends, but not weekdays

Demand for mountain biking in Wales spikes quite sharply at weekends and to some extent the adjacent days (for long weekend trips). Operators and local accommodation which relies on the business face a challenge in attracting custom from Tuesday to Thursday.

"Mountain biking is a weekend sport. Businesses close on a Tuesday because they know they're not going to say any mountain bikers. The issue is where do they get their mid-week business?"
Public body

Some stakeholders say that even with the higher weekend demand, capacity is not an issue except for the car parks, which can become full. Otherwise, forests tend not to feel crowded, and park operators can increase their capacity by providing extra trailers.

"Forests are good at soaking up visitors"
Public body

"Any capacity issues have been with the car parks but that's not an issue anymore since Covid lockdowns"
Public body

Demand by season

There is strong demand for mountain biking in Wales during spring and autumn. During these tourism shoulder seasons, it tends to be the more experienced mountain bikers who come, and mostly only at the weekends.

“Autumn is really strong, as is spring”

Bike park

Less experienced mountain bikers tend to visit in the summer. This is also when many experienced bikers do an annual trip to Europe for their activity, particularly to the Alps.

In winter, Alpine parks switch to skiing as the snow arrives. One operator points out that this is a key advantage of mountain biking in Wales compared to popular sites in Europe: Wales does not get much snow and so the parks can remain open for mountain biking all year round.

“The UK has a longer season than Europe as European parks are competing with skiing in the winter”

Bike park

If mountain biking is halted in Wales in the winter, it is usually because of high winds rather than rain or snow. It is not safe to be in a forest in high winds.

Differences between commercial and publicly operated parks

Some stakeholders say that commercially operated bike parks in Wales are ‘doing well’, whereas publicly run parks lack promotion. There is a consensus that mountain biking as a whole in Wales has not been well promoted for some time, after considerable investment was made in developing the product.

“Outside of privately funded companies like ourselves, and there about three others like us, Welsh Government have taken their foot off the gas”

Bike park

Mountain bike tours in Wales

Core markets

The 45 to 65 age group is a key market for mountain bike tours in Wales because this demographic group tends to have more leisure time and disposable income than younger groups. However, if a tour is particularly demanding in terms of endurance then the average age is likely to be younger.

“They [45 to 65 age group] tend to have a bit more disposable income and a bit more free time”

Tour operator

Demand for Wales

There is high demand for mountain bike tours in Wales in the summer, but for about six months in the wintry half of the year, demand is very low.

On the whole, demand for Wales is growing.

“Every tour this year has been full with a waiting list”

Tour operator

6. Mountain biking: future development

This section of the report is based on qualitative interviews and supplementary desk research. Quotations are attributed to the type of stakeholder. Interpretative commentary is based on the general views of stakeholders relevant to that sub-section, unless stated otherwise.

Promotion, opportunities and targeting

Joined-up approach needed for Wales

Mountain biking in Wales needs a coordinated marketing approach. Despite the success of some commercial bike park operators, the product in Wales as a whole needs a concerted promotional effort.

“Wales is lacking a joined-up approach. We’ve had very little public investment, it has nearly all been private.”

Bike park

“Having travelled the world and seen mountain biking in other countries, Wales has some of the best mountain biking in the world, and others would agree with that. But Wales doesn’t talk about it enough.”

Bike park

“There’s no central place for anyone to go who is interested in mountain biking in Wales. Where do they go? Where do they get their information?”

Bike park

“After a phase of implementation, Mountain Bike Wales went quite dormant. The website still sits there, but the activity behind it has really been quite poor.”

Charity

Significant proximity to large populations in England is a key advantage

Many operators point to Scotland as a destination which has its approach to mountain biking ‘well sorted’. However, a key advantage Wales has over Scotland is that it is much easier for most people in England to get to.

“95% of our customer base comes from England. The huge advantage we have over Scotland is that we’re so much closer. It’s so much easier to come to Wales than Scotland.”

Bike park

“Llandegla in North East Wales has about 19 million people living within two hours. South East Wales also has catchment of about 20 million people within two hours.”

Public body

E-bikes offer significant opportunities

The market for e-bikes in mountain biking is growing quickly. There is a significant benefit for park operators in that riders can get themselves back up to the top of the hill with an e-bike. Currently a significant amount of resource and investment is needed to transport riders to the top of the hill in vehicles or lifts.

“Approximately 20% of our customers use e-bikes, compared to 5% three years ago ... a big part of our business [resource] is bringing people back to the top of the trail. They can do it themselves if they’ve got an e-bike.”

Bike park

New markets

There is an opportunity to attract more families with less mountain biking experience. Promotion should feature more women to show that the activity is not just for men.

“The broader plan is to expand the network so we can accommodate families”

Bike park

“There should be as much marketing using women in the imagery as possible to show it’s not just for males”

Bike park

One operator would like to see more European visitors, as this market has been down since the COVID-19 pandemic and Brexit. A key advantage of Wales over European resorts as mentioned is that Wales does not lose its product to skiing like the popular Alpine parks do when their snow arrives.

“The fact there’s no snow [sic] in the winter is a huge benefit”

Bike park

Multi-day visits to fill weekday capacity

As mentioned, weekdays are hard for operators to fill as demand for mountain bike parks is so spiked towards the weekends. One operator would like to see the promotion of longer trips to Wales to fill up some of the weekday capacity.

“Where we really should be gaining is people coming to Wales for a week-long holiday”

Bike park

New product planned

Expansion of BikePark Wales and a new bike park in South West Wales

Planning permission has been granted to expand BikePark Wales. This will involve new routes across all difficulty levels, and accommodation will also be added to the site. There is also a commercial development underway for a new bike park in South West Wales.

Further park developments

There are other commercial park operators who have possible plans to expand their capacity should demand increase sufficiently. Capacity can be increased by expanding to adjacent land or by making transfers to the top of the hills more efficient, e.g. by investing in ski-style lifts.

“We have a little bit of wriggle room before we have to invest in a ski-style lift. A lift allows more even spread across the hill and more efficient transport up it. It’s early days in terms of cost vs benefit feasibility.”

Bike park

Product development needed and the barriers

Lack of recognition that the local economy benefits, not just the parks

One of the issues with decisions made about the viability of bike parks is the focus solely on the cost-benefit of running the park but a lack of understanding of the benefits to the local economy.

“The local economies around Cwmcarn, Coed y Brenin and Afan do very well out of those centres, but it doesn’t show up on the centres’ bottom line profitability”

Public body

NRW’s discontinuation of counter data

NRW no longer funds counter data which was used to measure rides until 2022. One local authority used to rely on that data to make business cases for Levelling Up funding.

Access to land

Gaining access to land for mountain biking presents a hurdle to the expansion of the product in Wales. Planning permission can be difficult to gain, and access to owners' land for mountain biking can also be problematic. One tour operator says there is prejudice towards mountain biking and cycling in general as some landowners think that the bikes will harm the land.

“There are some fantastic sections of trail in North Wales on the Traws Eryri route that go through some National Trust areas, private and crown estates and they're permissive for walkers but not bikes ... All the scarring on Pen y Fan is from walking. The reality is that mountain biking is more likely to be a 60 year old riding at 5mph, not shredding over some gap.”

Tour operator

“NRW has to go through planning hurdles for a further site. NRW put in a planning request but the amount of land requested is quite big and so it is currently stalled as the land is quite precious.”

Public body

Pump tracks

Some say that pump tracks are growing quickly in popularity. They are relatively inexpensive to build and are a good way of involving children and newcomers to mountain biking.

“Increasing the amount of pump tracks is a huge opportunity. They're cheap to build, great for children and people newer to the sport ... There is talk in Scotland of having one in every local authority.”

Bike park

“Pump tracks are the playgrounds of the future. I think ours cost in the region of £80/90k. It sounds a lot of money but it's cheaper than a kid's playground.”

Public body

Bike hire for beginners

If the promotion of mountain biking in Wales is to target a wider audience, there is a need for more bike hire for beginners. Not all bike parks currently offer this.

More bike parks would get used

One operator feels that if more bike parks were developed in Wales, they would get used because many riders like to try out one park after the next. It could also alleviate some of the weekend capacity issues at existing popular parks.

“People spend many days riding multiple sites. Those two days might not necessarily be both with us. They’ll ride somewhere else.”

Bike park

Insurance advice

Some stakeholders are very concerned about the liabilities of mountain biking. It is a potentially dangerous activity and it is not always clear where legal responsibility lies. This also affects the ability to obtain affordable insurance. One operator says they would appreciate legal advice on this.

“Litigation from crashes that happen on our trails is becoming more and more part of our everyday life. We have a few live cases that are being discussed with solicitors and there isn’t any case law to go on to see how these things will go ... the sport could literally disappear because nobody will be able to get insurance ... We could do with some guidance from the people who make the laws.”

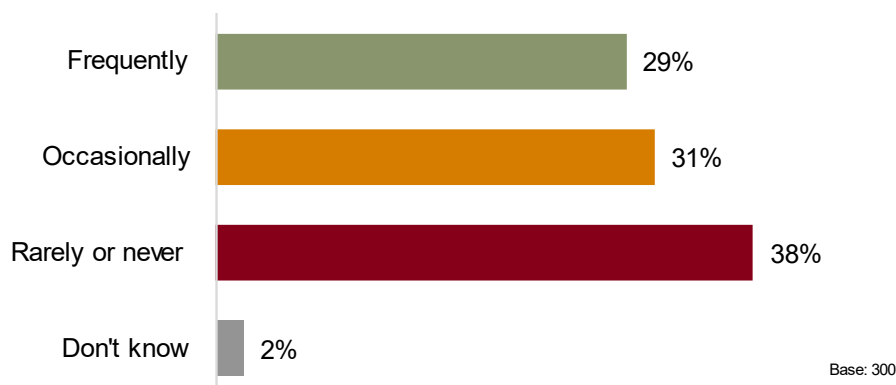
Bike park

7. Quantitative findings: accommodation providers

This section of the report is based on quantitative interviews with accommodation providers. Quotations are attributed to the type of provider by sector and region of Wales.

Frequency of receiving cyclists

Figure 3: Q2 "How often do you receive guests who cycle whilst staying in the area?"



Relevance of cycling tourism

Three in five (60%) businesses say they 'frequently' or 'occasionally' receive guests who cycle. A few (13) businesses contacted declined to take part in the survey on the grounds that they feel cycling tourism is not relevant to them. If these are factored into the above results, we can still conclude that over half (57%) of accommodation businesses in Wales 'frequently' or 'occasionally' receive guests who cycle, as the sample broadly represents the industry by sector and region.

"It's a great area for cycling. We have a massive group of cyclists that drop by every Thursday."
Serviced, South East

About two in five (38%) survey respondents say they 'rarely' or 'never' receive guests who cycle. However, this does not mean that they are all uninterested in the development of cycling tourism, as discussed in later questions. Some comment that they may receive more guests who cycle if it weren't for product closing down.

"Bwlch Nant Yr Arian, which belongs to the NRW, is closing down. I have everything that cyclists need but I'm not getting their business. But then why would cyclists want to come here when all the paths are closing down?"
Serviced, Mid

No difference by cyclists welcome accredited / non-accredited

Interestingly, the answers to Q2 when split by Cyclists Welcome accredited and non-accredited businesses are almost identical. This is discussed further under Q9.

Differences by region and sector

By sector, the proportions answering 'frequently' are higher among serviced accommodation (34%) and caravan & campsites (34%).

By region, the proportions answering 'frequently' are higher in South East Wales (44%) and North Wales (35%).

Figure 4: Q2 "How often do you receive guests who cycle whilst staying in the area?" (results shown by sector)

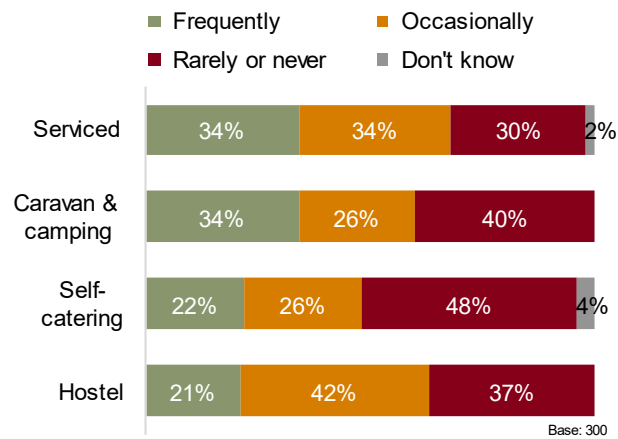
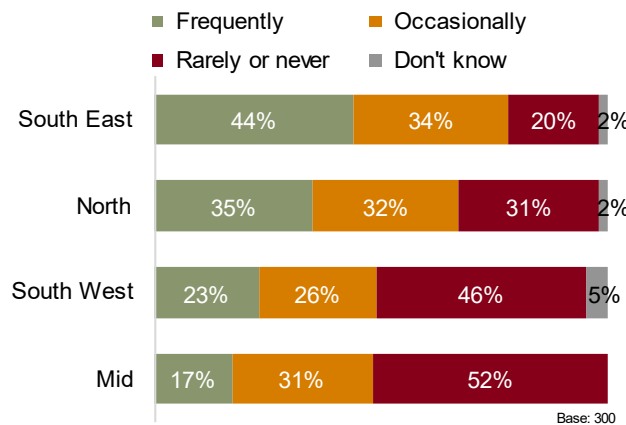


Figure 5: Q2 "How often do you receive guests who cycle whilst staying in the area?" (results shown by region)



Much of the variation in answers depends on the exact location of the business and its proximity to:

- Major cycle routes and/or safe roads

- Bike parks
- Major cycling or triathlon events
- Hills (as many say this makes their location unsuitable)
- Other major draws for visitors such as beaches (which can mean that accommodation gets booked up by other types of holidaymaker)

“We have Coed y Brenin very close, which is a fantastic facility for cyclists and is unfortunately under threat [of closure]. Then there's the route 23 and a bike centre all close to us. We have a lot of families turning up with their bikes on their cars as there is so much for them around here.”

Self-catering, North

“The main attraction is the event: the Dragon Ride”

Serviced, South East

“We have cyclists every day for the Taff trail and to cycle to the Bay or up to Caerphilly”

Caravan park, South East

“We are at the top of a very steep hill, only strong cyclists stay”

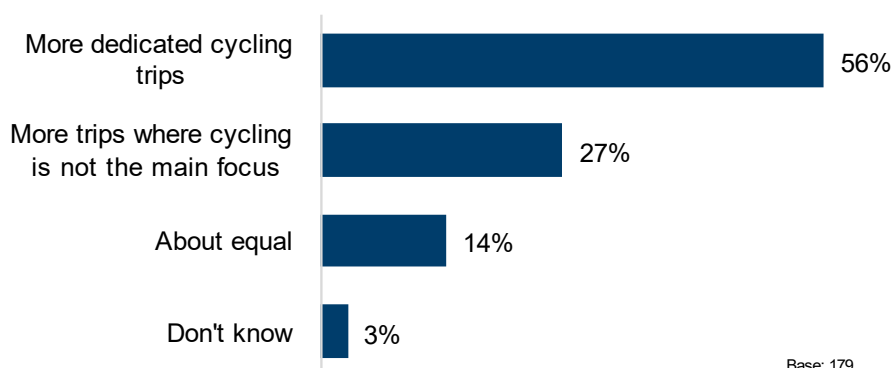
Self-catering, Mid

“We are on the Land’s End to John O’Groats cycle route”

Serviced, South East

Type of cycling trip

Figure 6: Q3 "Do you receive more guests who are on dedicated cycling trips, or more who cycle whilst visiting the area but it's not the main focus of their trip?"



Q3 has been asked to businesses which frequently or occasionally receive guests who cycle (Q2)

Dedicated cycling trips are more common

There are many dedicated cycling trips which take place in Wales. Some visitors also come for a different main purpose and cycle as part of their trip, but this is less common.

The proportion answering 'more dedicated cycling trips' is highest among:

- Businesses in South East Wales (75%)
- Cyclists Welcome accredited businesses (72%)
- Serviced accommodation (67%)

"We are on the Tour de Wales route where people cycle along the prom and around Great Orme. We had Mark Cavendish one year. Llandudno is definitely getting known by cyclists."

Serviced, North

"Great routes. We hire out bikes."

Caravan park, North

"People generally drive their bikes 30 minutes in the car to cycle around St Davids."

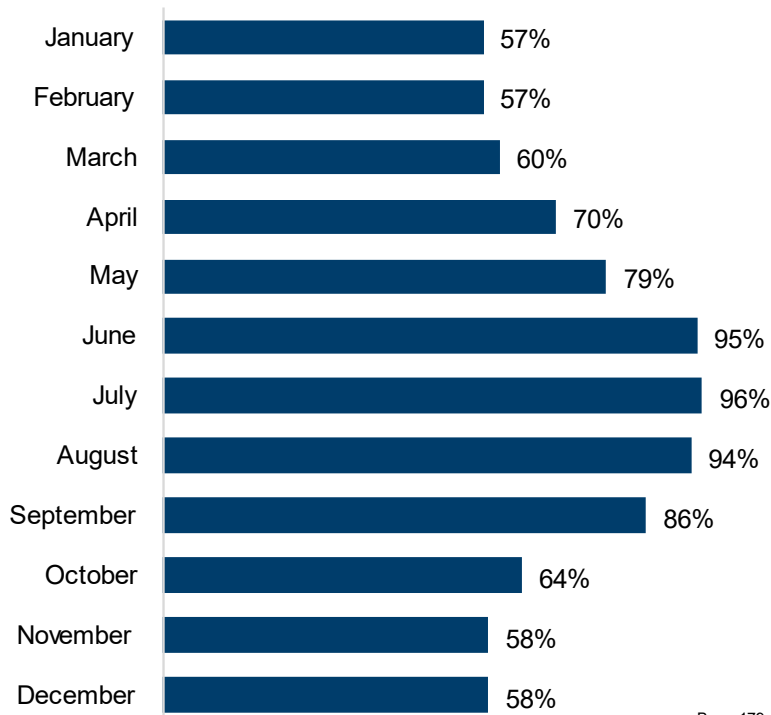
Serviced, South West

"They mainly go to BikePark Wales"

Serviced, South East

Months for receiving cycling guests

Figure 7: Q4 "In which months of the year do you typically receive guests who cycle in the area?"



Q4 has been asked to businesses which frequently or occasionally receive guests who cycle (Q2)

Strong all year round presence

One of the most important findings of this research is that cycling offers a good opportunity to attract guests in the quieter seasons. Addressing the seasonality issue of tourism is a key goal of Visit Wales, as outlined in [Welcome to Wales: Priorities for the Visitor Economy 2020 to 2025](#). Some businesses also indicate that they are keen to receive cyclists outside of the peak summer season, when they have high occupancy anyway.

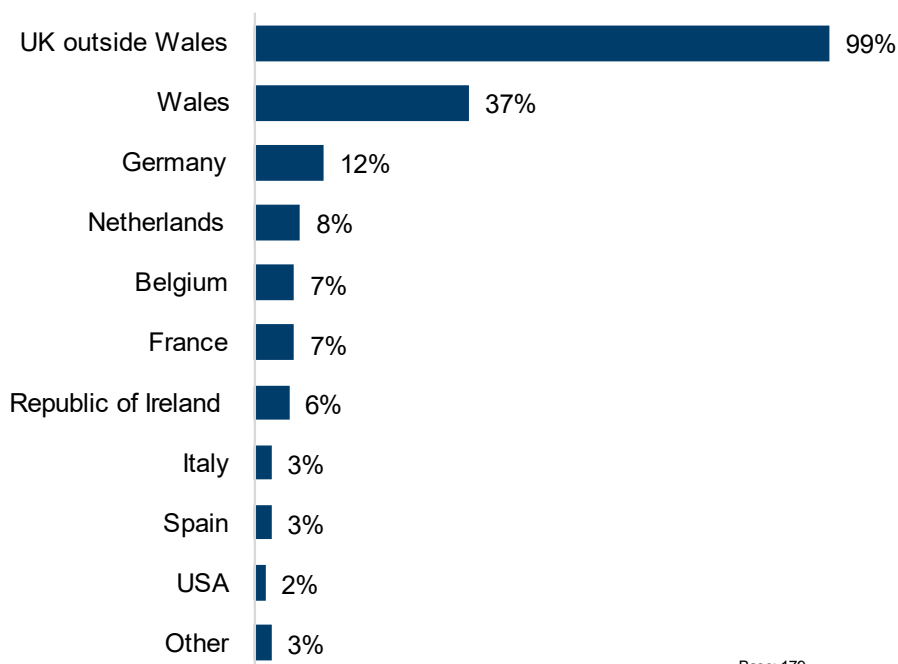
“Cyclists tend to stay for one night as they are passing through. It's not something I would like to encourage in the summer but it would be very welcome this time of year [November].”

Serviced, North

The strong all year round presence of cyclists is consistent across all sectors, regions and trip types, as it is not just the dedicated cyclists who visit outside of the summer.

Country of origin

Figure 8: Q5 "What are the main countries where those guests come from?"



Base: 179

Q5 has been asked to businesses which frequently or occasionally receive guests who cycle (Q2)

UK outside Wales is the primary market

Visitors who cycle come from numerous different countries, but the UK outside of Wales is the primary source of business. This is consistent across all regions and sectors.

“I think we had one group from France but they're usually from the UK”
Hostel, North

“Cyclists tend to be groups of males from the UK”
Self-catering, South East

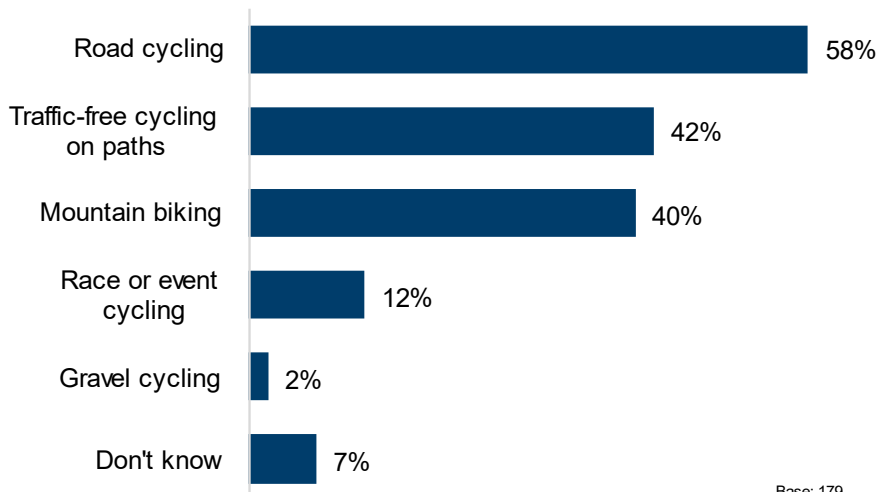
Overseas visitors mostly come from the closest European countries and are most likely to be on dedicated cycling trips. They tend to stay in serviced accommodation, hostels or caravan & campsites more so than in self-catering. Businesses in South West Wales seem to attract cyclists from a wider range of countries. There appears to be no difference between Cyclists Welcome accredited and non-accredited businesses in terms of attracting overseas visitors.

“Dutch people come and hire bikes”
Self-catering, North

“We are right by the coastal path. We have 20 German cyclists staying in May.”
Self-catering, North

Type of cycling

Figure 9: Q6 "Do you know what types of cycling those guests mostly tend to do whilst in the area?"



Base: 179

Q6 has been asked to businesses which frequently or occasionally receive guests who cycle (Q2)

Type of cycling varies by exact location

Wales currently attracts visitors who engage in a range of different types of cycling. This varies by the location of the business and their proximity to bike parks, dedicated cycle paths, the suitability of the roads and events.

Figure 10: Q6 "Do you know what types of cycling those guests mostly tend to do whilst in the area?" (Businesses primarily receiving dedicated cyclists)

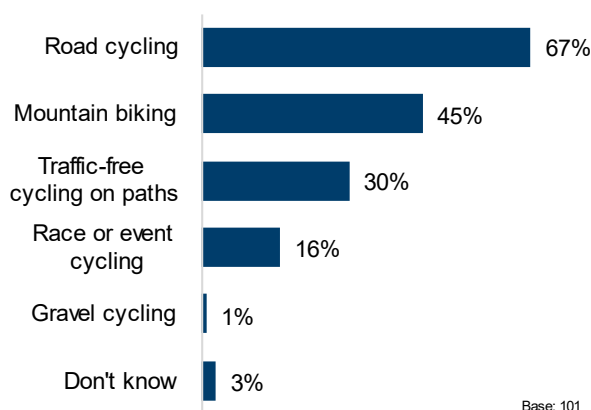
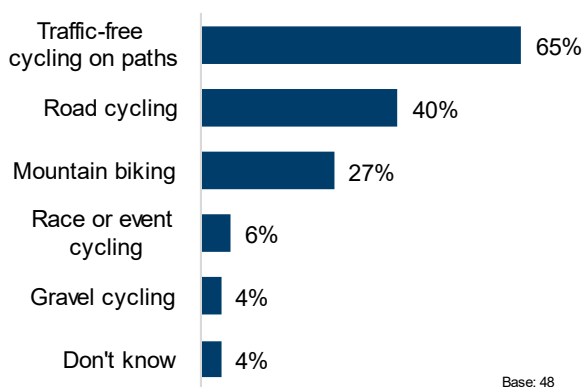


Figure 11: Q6 "Do you know what types of cycling those guests mostly tend to do whilst in the area?" (Businesses primarily receiving non-dedicated cyclists)



Among businesses which primarily receive dedicated cyclists, their two main answers to this question are 'road cycling' (67%) and 'mountain biking' (45%). The most frequent answer among businesses which primarily receive non-dedicated cycling trips is 'traffic-free cycling on paths' (65%).

"A lot of mountain biking here and the Taff trail is very close also"
Serviced, South East

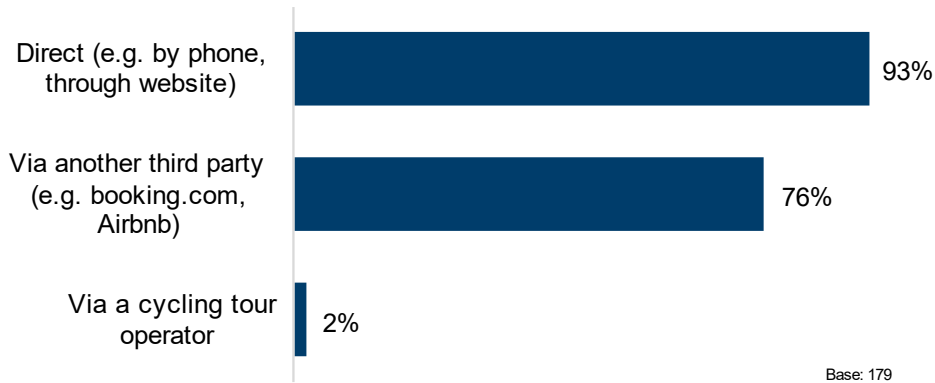
"The cyclists we've had have attended events in Llangollen"
Self-catering, North

"Very busy with road cyclists in the summer"
Serviced, North

"People do a lot of extreme mountain biking in the area"
Caravan park, South East

Booking accommodation

Figure 12: Q7 "How do they book your accommodation?"



Q7 has been asked to businesses which frequently or occasionally receive guests who cycle (Q2)

Combination of booking channels

Most businesses see a mix of bookings coming through third parties and directly. This is consistent across all sectors, regions and type of cycling trips accommodated.

“It’s a wonderful area for cyclists. We do like it if they book with us directly so we can then cater for all their needs”

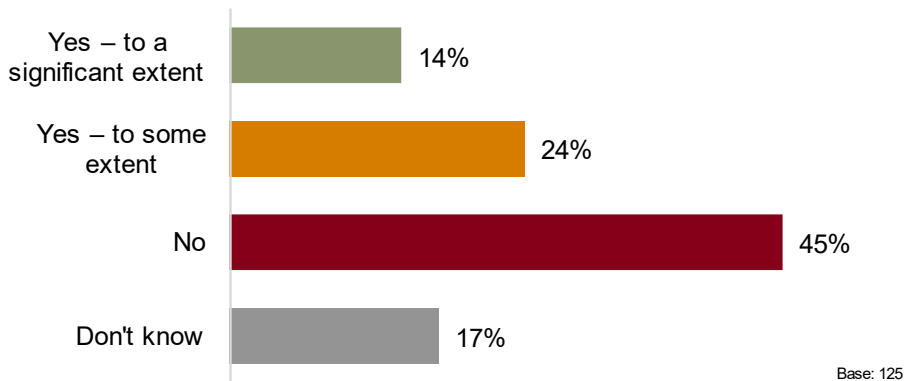
Serviced, North

“People book with BikePark Wales first and when they’ve got their dates there, they’ll book with us.”

Self-catering, South East

Benefits of being accredited

Figure 13: Q9 "Do you feel that being Cyclists Welcome accredited has helped your business to attract cyclists?"



Q9 has been asked to Cyclists Welcome accredited businesses

Limited benefits seen

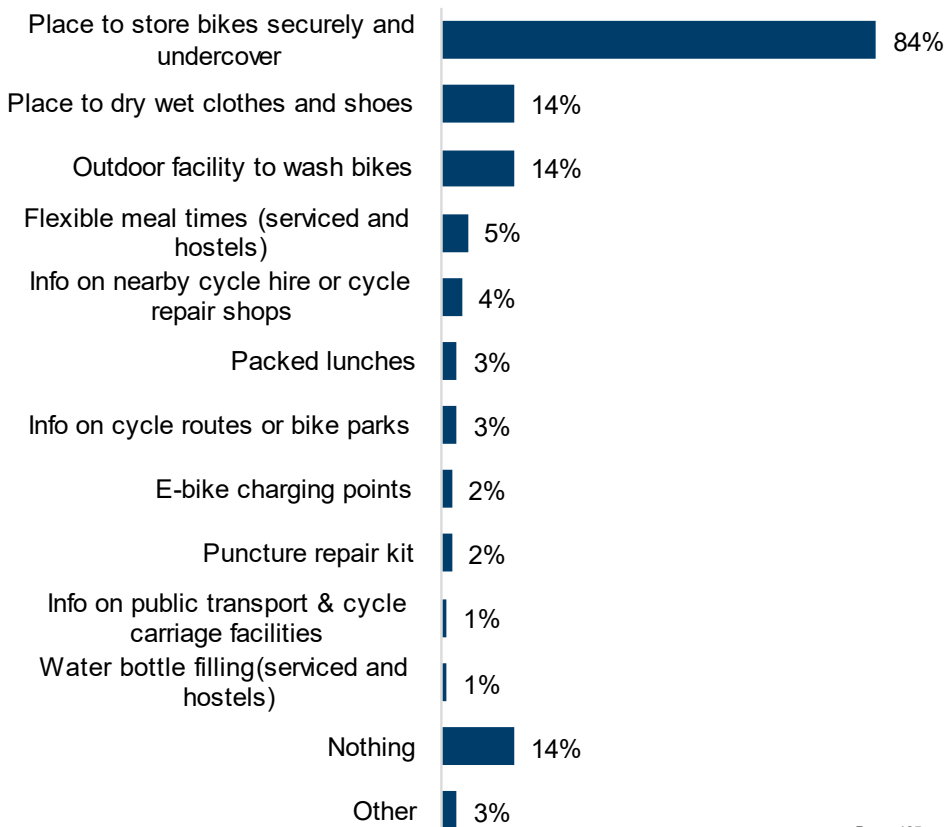
Some businesses say their Cyclists Welcome accreditation has helped them to attract cyclists, but the impact tends to be quite limited, and many businesses say they have seen no impact. Businesses are unclear about why this is.

“It may get busier when the Tywi path opens, but being accredited has not got us more cyclists”
Serviced, South West

The serviced sector seems to have seen the most benefit, with 21% answering ‘yes – to a significant extent’ and 30% answering ‘yes – to some extent’.

Services and facilities requested

Figure 14: Q10 "Are there any types of service or facility specifically related to cycling which guests frequently ask you for?" (Unprompted)



Base: 125

Q10 has been asked to Cyclists Welcome accredited businesses

Only a few facilities get asked for

For an accommodation business to meet the needs of cyclists, the main priority is to offer a place to store bikes securely and undercover. This is frequently requested by the guests, although some cyclists don't need this as they store their bikes in their van or in a caravan.

"Most cyclists who stay will leave their bikes overnight in a van but we do have a lock-up if this isn't the case"

Serviced, North

Otherwise, in spite of the numerous facilities and services recommended by the Cyclists Welcome scheme, accommodation operators tend not to get asked for much else. Places to dry wet clothes and shoes and facilities to wash bikes are more likely to be requested in accommodation which receives mountain bikers and off-road cyclists.

"We get asked for a hot tub. Cyclists enjoy it at the end of the day after being at BikePark Wales and then they come back to us for that."

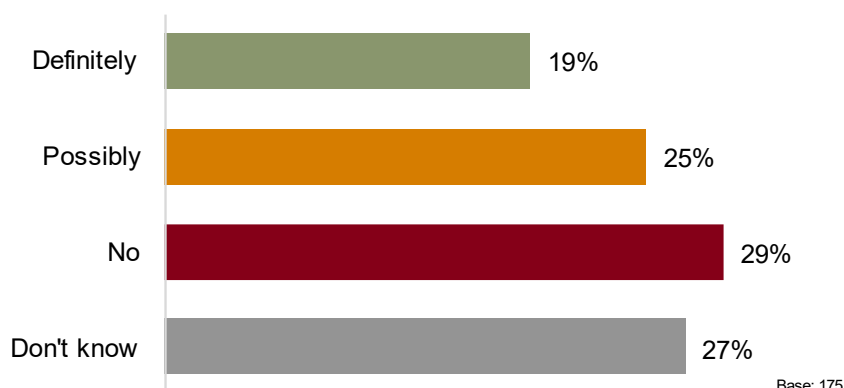
Self-catering, South East

"A lot of cyclists stay but nobody has asked for anything"

Self-catering, South East

Interest in becoming accredited

Figure 15: Q11 "Do you have any interest in becoming Cyclists Welcome accredited?"



Q11 has been asked to businesses which are not Cyclists Welcome accredited

Reasonable degree of interest

There is interest among non-accredited businesses in becoming accredited. The findings are fairly consistent across different sectors and regions. Some say they weren't aware of the scheme.

“I’ve thought about it ... there are many cyclists in the area so I'm thinking of starting to provide things for cyclists in the future.”

Self-catering, North

“There are plenty of cyclists in the area and we have plenty of bike storage space. Very interested”

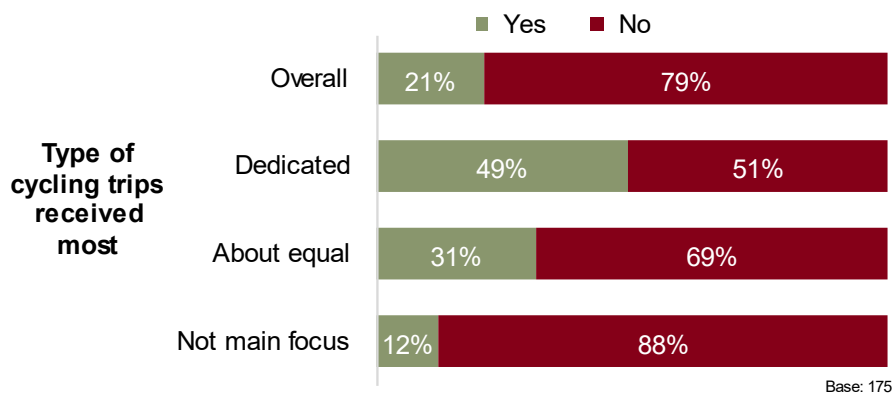
Self-catering, Mid

“We are right on the coastal path. Lovely places for cyclists and walkers. We are very interested in Cyclists Welcome accreditation.”

Serviced, South West

Promoting suitability for cyclists

Figure 16: Q12 (Non-accredited) "Does your business promote itself in any other way as being suitable for cyclists, for example by listing relevant facilities?"



Q12 has been asked to businesses which are not Cyclists Welcome accredited

Some promotion by non-accredited businesses

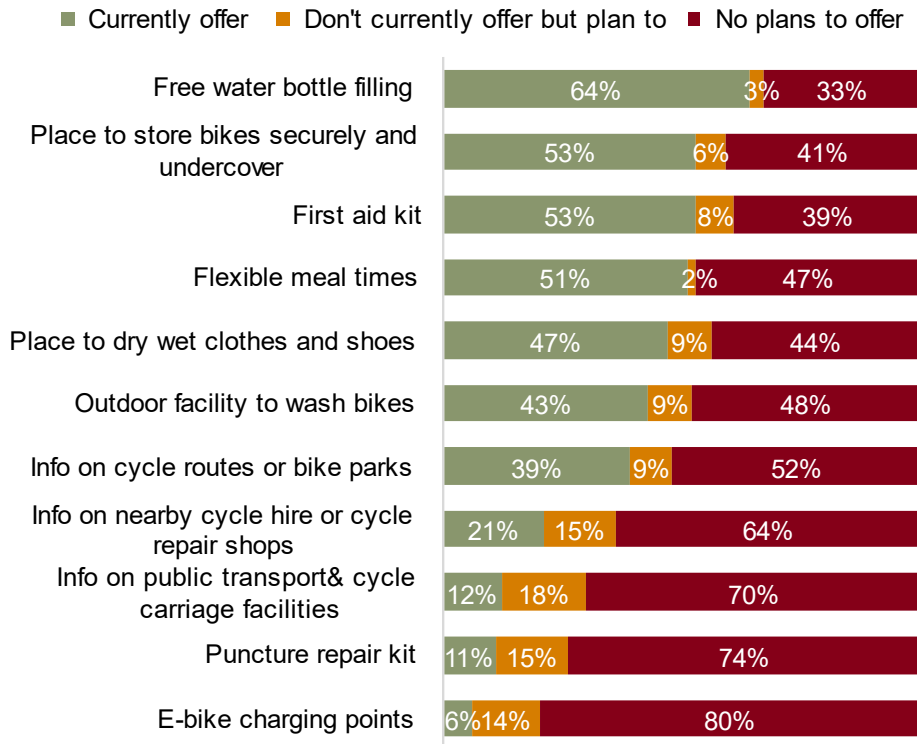
Some (21%) non-accredited businesses promote their suitability for cyclists. This correlates with the level of cycling dedicated trips that they attract, shown above.

“We advertise on our website that we have facilities for cyclists ... Cyclists have to be fit as it is very hilly here”

Self-catering, Mid

Services and facilities offered

Figure 17: Q13 (Non-accredited) "Does your accommodation currently offer or plan to offer any of the following services that are specific for cyclists?"



Base: 175

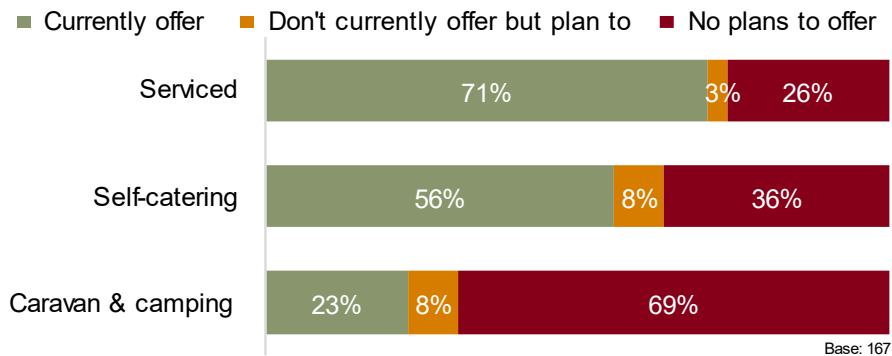
Q13 has been asked to businesses which are not Cyclists Welcome accredited. 'Free water bottle filling' and 'flexible meal times' have just been asked to serviced accommodation and hostels.

Many non-accredited businesses already meet cyclists' needs

Many non-accredited businesses offer a range of services and facilities for cyclists. It appears that numerous businesses which are not accredited under the Cyclists Welcome scheme already meet most of the needs of cycling guests, as set out under Figure 14.

Bike storage

Figure 18: Q13 (Non-accredited) "Does your accommodation currently offer or plan to offer places to store bikes securely and undercover?" (results shown by sector)



The base for hostels is very low (8) and so they are excluded from the sector breakdown

The most important facility is secure bike storage, as discussed under Figure 14. The majority (71%) of serviced accommodation and around half (56%) of self-catering businesses provide this. However, a minority (23%) of caravan & campsites do so, and only a further 8% of them plan to introduce it. Some cyclists keep bikes inside the caravans.

"Nobody has ever asked us for storage. They keep their bikes in their caravans but we would try and accommodate them if asked."

Caravan park, North

"We do have storage for bikes and there are lovely paths for cyclists. We support Ironman but they tend to bring their very expensive bikes inside."

Serviced, South West

"We had a lot of bike thefts a while ago so we have storage containers that are kept locked up. Only the wardens have keys."

Caravan park, South East

"Our place is only small and people who bring bikes will keep them inside the cottages, getting oil and dirt everywhere, which isn't ideal"

Self-catering, South East

The other two facilities quite frequently requested by some types of cyclist discussed under Figure 17 are a place to dry clothes and a place to wash bikes. Caravan & campsites and self-catering businesses are more likely to offer these than serviced accommodation. About half (54%) of self-catering businesses and a similar proportion (50%) of caravan & campsites offer a place to dry clothes, compared to a lower proportion (31%) of serviced accommodation providers.

Just over half (56%) of self-catering businesses and 46% of caravan & campsites offer an outdoor facility to wash bikes, compared to a lower proportion (24%) of serviced accommodation providers.

E-bikes

E-bikes are growing in popularity among cyclists but some accommodation businesses are wary of the fire and insurance risks and the cost of charging batteries.

“I actually bought a few e-bikes for guests to use but then thought better of it because of the liability implications”

Self-catering, North

“I am wary of people charging their batteries in the rooms for their e-bikes”

Serviced, South West

“The fire regs have changed in the last few years and the charging of e-bikes is deemed a hazard”

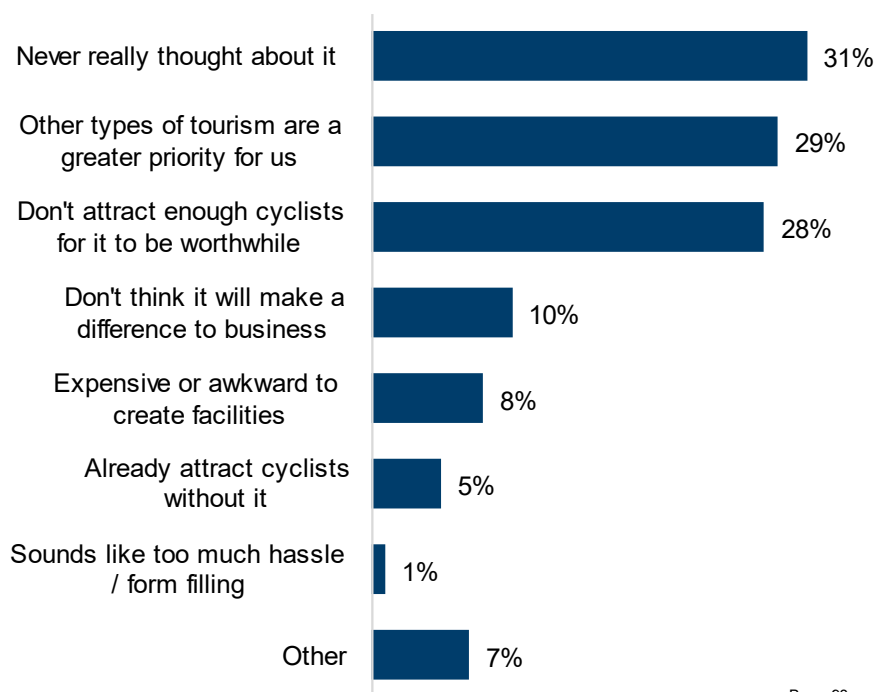
Self-catering, Mid

“We don't want to encourage e-bikes, and charging people to charge them is a bit of a murky subject”

Serviced, Mid

Reasons for not being interested in accreditation

Figure 19: Q14 "Are there any particular reasons why you are not interested / don't know if you are interested in becoming Cyclists Welcome accredited?" (Unprompted)



Base: 98

Q14 has been asked to businesses not expressing an interest in becoming accredited (Q11)

Variety of reasons

A number of reasons have been given for not being interested in accreditation, but it seems that the expense or hassle of creating facilities is not a major barrier.

Some operators are more focused on other types of tourism.

"We offer walking holidays mostly"

Serviced, Mid

"We're only a small place and we mostly attract families, for the beach."

Self-catering, South West

"We offer a very high-end dining experience so we're not the sort of place to attract cyclists"

Serviced, Mid

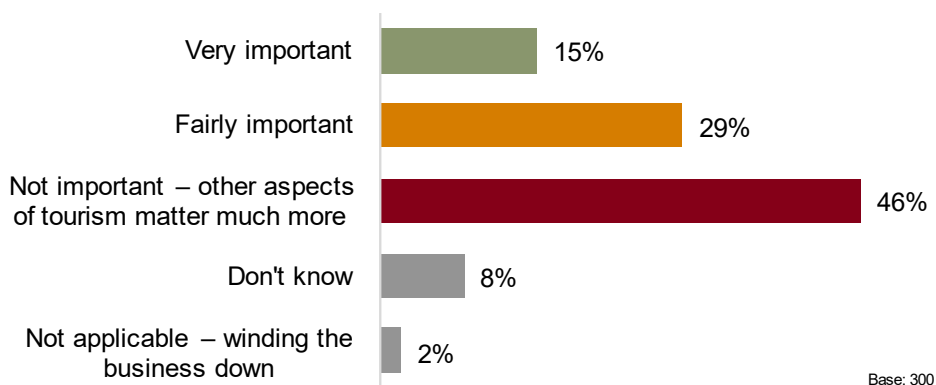
Some say they don't attract enough cyclists for accreditation to be worthwhile. Some also say that their location is unsuitable for cycling. Too many steep hills, dangerous narrow country roads and the lack of off-road cycle paths in their area are common reasons given.

"The roads are very narrow so a bit dangerous"

Serviced, South West

Future importance of cycling tourism

Figure 20: Q15 "How important is cycling tourism to the future of your business?"



Range of views

44% of businesses say that cycling tourism is important to their future. If the 13 businesses declining interview on the grounds of not feeling that cycling tourism is relevant to them are factored in (discussed earlier under Q2), it makes a negligible difference to this proportion (43%).

“We welcome as much Lycra as possible! Public loos are closed in the winter but cyclists are very welcome to use our facilities all year round.”

Serviced, South West

“We'd like cycling to be a more important part of the business's future. If more information was available, we could promote it more. We're always booked out in June for a cycling event.”

Self-catering, South East

There are no significant differences by sector or whether the business is Cyclists Welcome accredited. By geography, answers vary as before by exact location and proximity to bike parks, cycle paths, good roads or events.

“I've never lived in a place with so many cyclists! We are on the Ironman route.”

Serviced, South West

Some businesses are not interested in attracting cyclists because they reportedly prefer one-night stays.

“Most cyclists stay one night and we do a minimum of two nights”

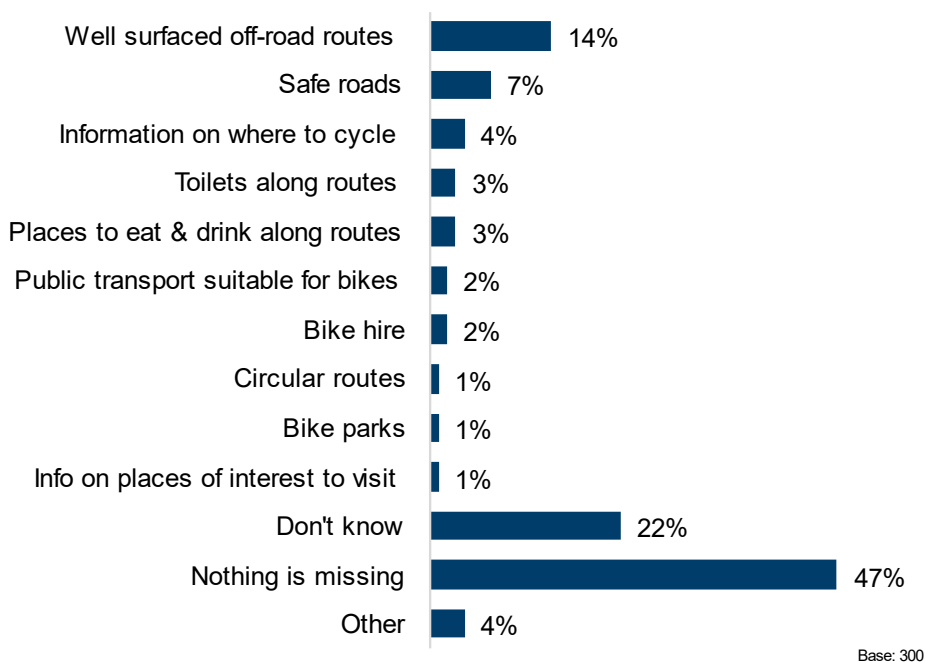
Self-catering, North

“Smaller B&B operators find it a real problem having one-night stays”

Serviced, North

Is anything missing for cyclists?

Figure 21: Q16 "What, if anything, do you feel is missing in the local area for visiting cyclists?" (Unprompted)



The product is already largely there

Wales seems to be already well set up for cycling tourism in terms of the product. About half (47%) of business feel that nothing is currently missing, and a further 22% don't know if anything is missing.

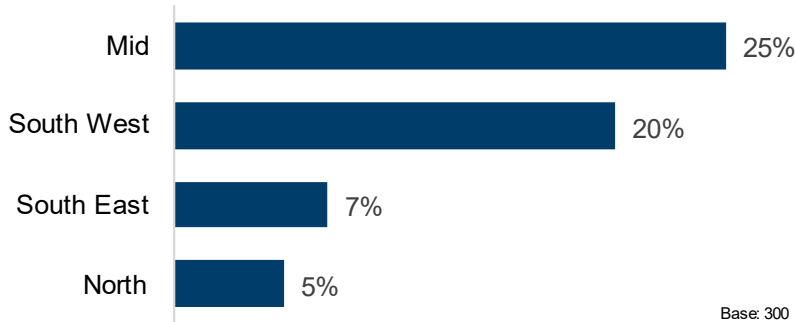
"There are plenty of routes for cyclists in our area: Ogmore loop, Margam Park, mountains"
Serviced, South East

"There are plenty of beautiful cycle routes"
Serviced, North

Dedicated paths and hazardous roads

The two most frequently mentioned missing aspects of the product are 'well surfaced off-road routes' and 'safe roads'. This is also where the main difference by respondent group lies as it varies by location:

Figure 22: Q16 % answering unprompted that well-surfaced off-road routes are missing (results shown by region of Wales)



Some areas have a good cycle path, only for it to stop short of a popular end point or involve an awkward break along the route. Sometimes the signage isn't clear enough.

“The cycle path we've got only goes so far. You have to go on the main road to get to Gowerton. There's a big chunk missing.”

Self-catering, South West

“It would be great to extend the cycle path off the main road and down to Newgale. At the moment, the cycle path is on a stretch of a busy road, which isn't pleasant.”

Serviced, South West

“It's not a good area for cyclists because of the terrain. There are no cycle paths.”

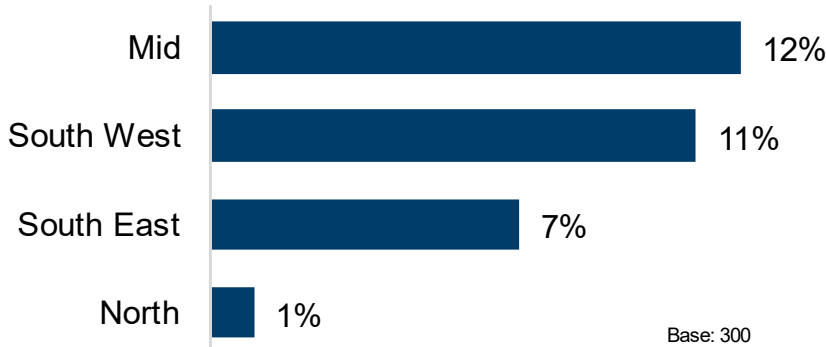
Caravan park, Mid

“We're in the middle of a cycling route and people have told us that when they get to us there's a confusing break in the route and the signage isn't great”

Caravan park, South West

Similarly, businesses in Mid Wales and South West Wales are more likely to feel that their area lacks 'safe roads':

Figure 23: Q16 % answering unprompted that safe roads are missing (results shown by region of Wales)



“We advise people not to cycle on the Lampeter to Aberaeron road. It's lethal.”

Caravan park, Mid

“This area attracts a lot of triathletes but we need more family-friendly routes as there are a lot of single track roads that I wouldn't recommend for family cycling”

Self-catering, Mid

Further elements lacking

Comments on other elements of the cycling product currently felt to be lacking include public transport, information on routes and places to hire bikes, but these have only been reported by a minority of businesses.

“People often ask for bike hire shops but most of them have closed down”

Serviced, South West

“There are plenty of places like forests in the area to go cycling but not enough information. We also need better public transport in the area.”

Self-catering, Mid

Final thoughts on developing cycling tourism in Wales

Whilst there are some localised issues discussed above concerning a lack of safe and dedicated cycle routes, many areas of Wales are felt to already have a strong cycling product. Developing cycling tourism in Wales is felt to be an issue of promoting the product rather than necessarily adding a lot to what is already there.

“Oodles of lovely routes”

Caravan park, North

“Llanberis is pretty well geared for cycling and other outdoor pursuits”

Hostel, North

“There is an opportunity to offer more bike tours and cycle hire in the area”

Self-catering, South West

“We have had more cyclists this year than ever so we are seriously considering advertising in cycling magazines”

Serviced, North

“We live in Ceredigion and it's a wonderful place to cycle but there's not enough being done to attract cyclists to the area. We need more maps for cyclists to know where they can go and more routes, and advertising.”

Self-catering, Mid

“We're more than happy to collaborate on any initiatives for the area”

Hostel, South West

8. Recommendations

Strong case to prioritise cycling tourism

There is a strong case for prioritising cycling because:

- Much of the core product already exists as it fits with central and local government well-being aims
- Wales is felt to have the beautiful natural attributes that cycling tourists are looking for
- It attracts strong demand in the shoulder seasons, when many accommodation beds would otherwise be empty

Areas for growth

The key areas for growth are the market segments not currently making up the bulk of the demand: women, families, and those who would cycle not as the main purpose for the holiday.

These market segments need to see a joined-up offering which brings together cycle routes of a comfortable length and degree of difficulty with attractions and quaint towns. Wales is felt to have this product already and Visit Wales' website already takes this approach, it just needs the promotion to raise awareness.

Events can be used as a catalyst to promote cycling tourism in Wales, as there is an existing market of visitors who could be encouraged to extend their stay and/or re-visit at other times.

Bike hire

If the more 'leisurely' market is targeted for growth, these are the visitors more likely to need to hire bikes than the dedicated cyclists, who currently make up the bulk of the demand.

Bike hire seems to be a somewhat circular problem in some areas, as commercial operators lack conviction that it will be viable. Some public sector support to kick-start bike hire may be needed.

As the demand for e-bikes grows rapidly, the need for bike hire may well increase with it as e-bikes are expensive to buy. There are challenges with costs for providers, insurance and sufficient safe charging points which need addressing.

Many willing partners

There are many willing local authorities, charities, cycling public bodies, tour operators, event organisers and accommodation providers who will support efforts to prioritise and promote cycling tourism in Wales.

9. External references

- Welsh Government (2024), '[All-age Mental Health Strategy and Wellbeing Strategy](#)'. Cardiff: Welsh Government
- Welsh Government (2024), '[Working Together for a Healthier Wales](#)'. Cardiff: Welsh Government
- Welsh Government (2015), '[Wellbeing of Future Generations Act 2015](#)'. Cardiff: Welsh Government
- Visit Wales (2025), '[Visit Wales Quality Assurance Schemes](#)'
- Welsh Government (2024), '[Tourism Barometer: February Wave, 2024](#)'. Cardiff: Welsh Government
- Welsh Government (2024), '[Tourism Barometer: June Wave, 2024](#)'. Cardiff: Welsh Government
- Department for Transport (2024), '[E-cycle and e-scooter batteries: managing fire risk for premises](#)'
- Visit Wales (2025), '[Welcome to Wales: Priorities for the Visitor Economy 2020-2025](#)'