



# Wales on Two Wheels: Cyclists' Experiences and Expectations

## Visit Wales



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

© Crown Copyright     Digital ISBN: 978-1-80633-714-9

# Wales on Two Wheels: Cyclists' Experiences and Expectations

Anthony Lydall, Strategic Research and Insight



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

For further information please contact:

Research and Insights Team

Visit Wales

Economy, Energy and Transport

Cathays Park

Cardiff

CF10 3NQ

Email: [tourismresearch@gov.wales](mailto:tourismresearch@gov.wales)

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

ISBN: 978-1-80633-714-9

23<sup>rd</sup> December 2025

© Crown Copyright 2025



All content is available under the Open Government Licence v3.0, except where otherwise stated.

[Open Government Licence](#)

**Contents**

1. Summary .....2

2. Background and method .....4

3. Trip characteristics .....6

4. Deciding on the destination and influence of events .....8

5. Priorities for cycling routes and services .....13

6. Experiences of Wales and competitor destinations .....22

7. Implications for Visit Wales and partners.....27

# 1. Summary

## Deciding on the destination and influence of events

### Complex process

Deciding where to go on a cycling trip is complex, with cyclists typically drawing upon ideas from multiple sources. Many (72%) say they research on Google or other websites. However, they may well already know broadly where they want to go before typing into a search engine. The search usually refines a preconceived idea into a more specific location.

Top level inspiration may be built up over a long time from seeing destinations promoted or hearing the experiences of others. Two thirds (66%) say they use recommendations from friends or family. Two in five (40%) say they go back to places they already know.

### Influence of Tour de France and other major events

Some cyclists have previously watched elite races in Wales and plan to watch the Tour de France when it comes in 2027. The Tour and other major events can influence cycling destination choices, for the following reasons:

- Serious road cyclists can become inspired to tackle the iconic climbs
- Sometimes the roads are kept closed the day before or after the race passes through for others to have a go at a stage or part of a stage
- Coverage of the Tour de France often includes featuring small towns and villages which the race passes through, showing aspects of a location's history and scenery; some feel that this is Wales' opportunity to showcase itself

That said, cyclists have raised the point that Wales needs to be 'product-ready' to capitalise on cyclists being inspired to visit Wales following the event.

## Priorities for cycling routes and services

### Road and path cycling routes

'Attractive scenery' is the most essential route feature for almost every respondent group by trip purpose, party type, age and gender, with two thirds (66%) saying this is 'essential'. The only exception is that families and those for whom cycling is not the main trip purpose place similar importance on 'routes free of motorised traffic' (if not cycling on roads).

Attractive scenery matters a lot on holidays and breaks because the experience is intended to be uplifting, even if cycling fairly hard or fast.

Parents with young children are much more safety-conscious than before they had children and tend to seek off-road routes where possible.

## **Mountain bike routes**

The top route priority for mountain bikers is that trails are ‘maintained to stay fully open and free of hazards or diversions’, cited as ‘essential’ by 56%. This is followed by ‘challenging routes’, which 46% rate as ‘essential’.

## **Priority services (all cycling types)**

‘Being made to feel welcome as a cyclist’ is the top answer in every respondent group. Three in five (60%) rate this as ‘essential’. Cyclists highlight several key meanings to ‘feeling welcome’:

- Being shown respect by other road users or path users
- Seeing that service providers in an area are set up to meet the needs of cyclists
- Perceiving a friendly attitude towards cyclists among the local population

‘Accommodation with secure undercover bike storage’ is rated ‘essential’ by close to half (45%) of cyclists, and ‘cafés with places to secure a bike’ is rated ‘essential’ by 39%.

## **Experiences of Wales**

### **Wales has significant potential**

Cyclists of all types agree that Wales is potentially very appealing as a cycling destination. It has a beautiful and varied landscape which offers the relaxing experience cyclist tourists seek, an abundance of hills for mountain bikers and many off-road paths and mountain bike trails already in place.

### **Disjointed product and welcome need addressing**

For Wales to achieve its potential, cyclists see key issues which need addressing:

- Whilst an extensive network of off-road paths and trails exists in Wales, it is not well maintained or joined up in some places; this often results in sudden unexpected impasses, or joining footpaths or busy roads
- Where routes are well maintained, the supporting product is often lacking, including nearby cycle-friendly accommodation, bike repair shops, bike hire, good places to eat and drink, and public transport which accepts bikes
- Some road cyclists and mountain bikers have identified a lack of welcome compared to European destinations

Cyclists believe that Wales could make trip planning easy if cycling ‘hubs’ with all the necessary products and services could be developed and promoted.

## 2. Background and method

### Why has this research been commissioned?

Visit Wales has identified cycling as a special interest tourism product with potential for future growth. Cycling 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 also offers good potential in the shoulder seasons, which aligns well with Visit Wales' aims to grow tourism outside of the peak summer season.

In 2024, 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 were 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

The research confirmed cycling as a tourism product with good potential for growth in Wales and the report can be read here: [Cycling tourism development](#).

Following on from the cycling tourism development research, Visit Wales commissioned SRI to conduct consumer research, exploring their needs when taking cycling breaks and holidays – including planning cycling trips, destination choice factors and infrastructure needs.

### How has this research been conducted?

The consumer research has been conducted in two phases:

- Quantitative phase to explore needs in breadth
- Qualitative phase to explore needs in greater depth

We discuss each phase in turn below.

#### Quantitative phase

We gathered a sample of 220 consumers who cycle whilst on a holiday or break away from home, either with cycling as the main purpose of the trip or as an activity undertaken but not the main trip purpose. The sample was drawn from two sources:

- Spectators at the Welsh National Cycling Championships in Aberystwyth in June 2025 through face-to-face interviews (37)
- Contacts on Beicio Cymru's database of cyclists through an online survey (181 responses)

We discuss the make-up of the quantitative sample in terms of cycling type and party in section 3.

## **Qualitative phase**

In the quantitative phase, we asked respondents if they would be interested in taking part in a follow-up focus group to discuss needs in more depth. From this we recruited participants for three focus groups, structured as follows:

- Group 1: road cyclists who most often cycle as the main trip purpose without children
- Group 2: mountain bikers who most often cycle without children
- Group 3: families with children who most often cycle traffic-free on paths

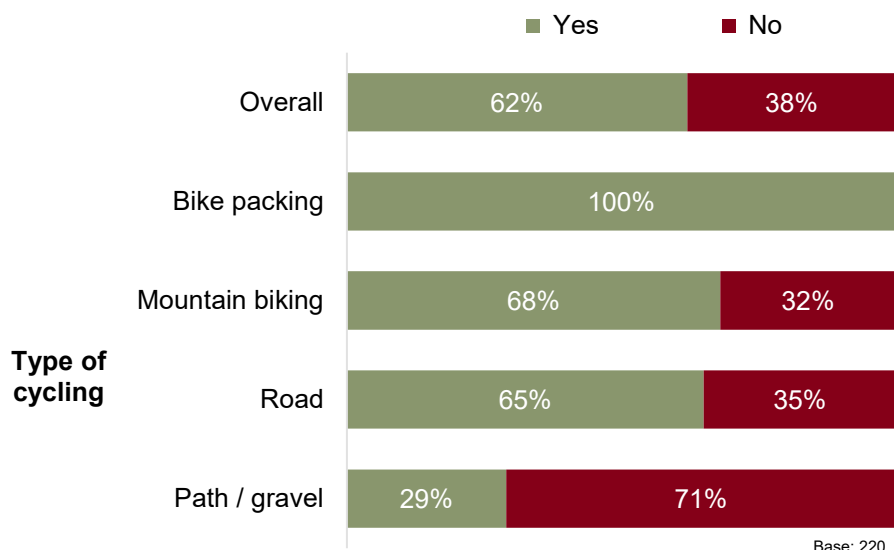
## **Understanding how the two phases are reported**

All charts and percentages in this report are from the quantitative survey. We have used the qualitative feedback from the focus groups to explain the numerical findings. Some of the verbatims are also taken from the open comments made in the quantitative survey to add extra illustration of key points made.

### 3. Trip characteristics

#### Trip purpose

Figure 1: Q2 “When you cycle on breaks away from home, is cycling usually the main purpose of the trip?”



#### Purpose depends on the type of cycling

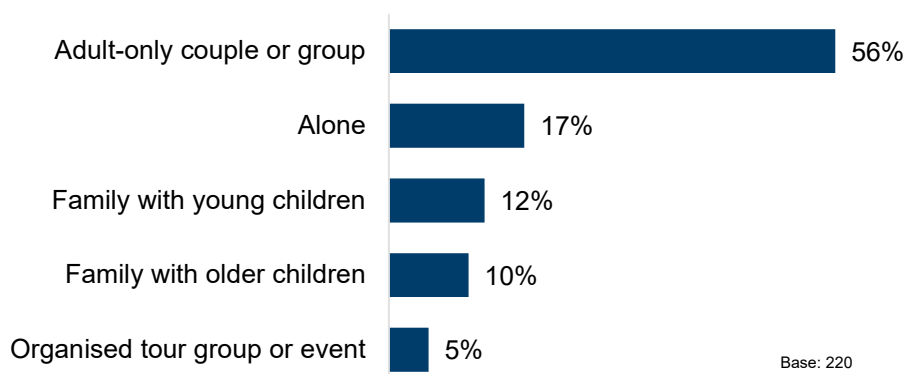
For roughly two thirds of the cyclists in the sample, cycling is usually the main purpose of the trip, but this varies significantly by the type of cycling they do, shown on the above chart. Those engaging in traffic-free cycling on paths or gravel are more likely to have a different main purpose than cycling.

Linked to this, adult-only groups are more likely to have cycling as their main trip purpose (stated by 67%). By comparison, 39% of families with children cycle as the main purpose; they are more likely to cycle traffic-free.



## Type of party

**Figure 2: Q4 “Which of the following best describes your cycling group when on a break away from home?”**



### Adult-only cycling is more common than with children

Across all types of cycling, adult groups or individuals are more common than families with children. The highest proportions of families are found among the following respondent groups:

- Those cycling on paths or gravel (families make up 35% of respondents)
- Those aged 35 to 54 (33%)

### How do adult cyclists with children behave?

Adult cyclists tend to do the activity before the children come along and then their priorities during their family trip change to:

- Encouraging the children to engage in the activity too by seeking family-friendly routes on trips, which usually means traffic-free, relatively flat and with plenty of other things to do on-route
- Striking a balance between spending time with their family and finding opportunities to get out on their bike alone for more challenging rides

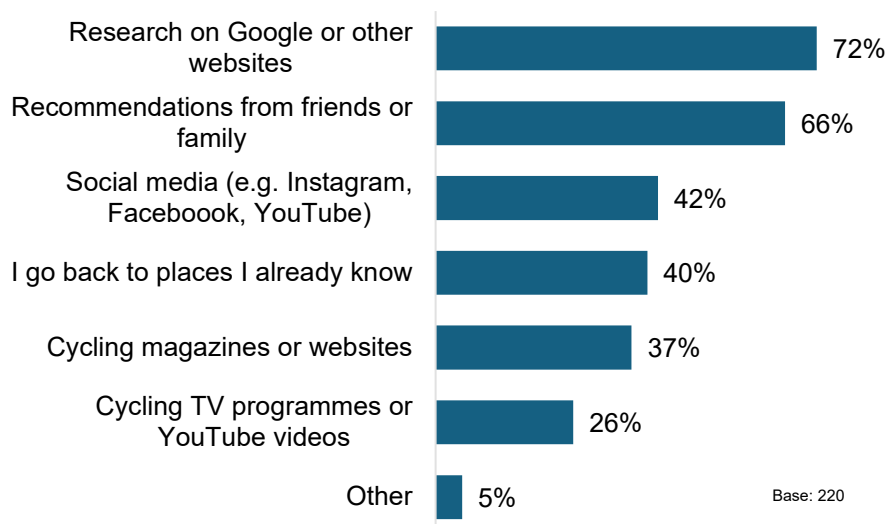
If seeking some ‘freedom’ to cycle alone, this may be done as a one-off day with the family’s consent, or with a very early start before breakfast so that the family can still spend the rest of the day together.

Some parents (especially dads) have ambitions for their children to one day be strong enough to tackle the big climbs with them. Another motivation for wanting children to cycle on breaks is to keep them off their screens.

## 4. Deciding on the destination and influence of events

### Finding inspiration and making the decision

**Figure 3: Q9 “How do you usually decide where to go for a cycling trip or break?” (prompted)**



### Complex process

The process of deciding where to go on a cycling trip is often complex, and this topic has been explored in depth in the focus groups. Looking at the quantitative data first above, respondents have ticked an average of three answers each to the question.

### Research on Google or other websites

This is the top answer in most respondent groups. However, cyclists may well already know broadly where they want to go before typing into a search engine. The purpose of the search is more likely to refine the preconceived idea into a more specific location and whether it is viable, rather than to find inspiration for a country.

The top level of inspiration of broadly where to visit can come from other members of the party, or it may be built up over a long period of time from hearing and seeing destinations promoted or the experiences of themselves or others. We discuss each of these sources of influence in more detail below.

“I sit in front of the computer with a bunch of options and the first thing I google is ‘bike hire’ in these locations. If I can find something in those areas that’s affordable, I go look at accessible routes.”  
Male, 35 to 44, adult road cycling

## Recommendations

This is the top answer among:

- Under 35s (83% have answered this)
- Mountain bikers (74%)
- Road cyclists (61%)

Recommendations are particularly influential if coming from someone whose party has similar needs, e.g. one parent recommending to another parent with children of similar age. The cyclist on the receiving end of the recommendation may then conduct further online research themselves into specifics for a trip, but the recommendation is very influential on broad destination choice in that it sets the parameters for the online searching.



Elan Valley

## Social media & cycling media

Use of social media to aid the decision is higher among:

- Mountain bikers (60%) vs other types of cyclists (35%)
- Under 55s (51%) vs over 55s (26%)
- Women (52%) vs men (36%)

Cycling media are more likely to be used by main-purpose cyclists and adult-only groups. Exposure to media contributes to the long-term build-up of shortlist or 'bucket list' ideas of cycling destinations to visit.

## **Return to known places**

This answer has been given more frequently by:

- Mountain bikers (58%) vs path or gravel cyclists (45%) and road cyclists (29%)
- Adult-only parties (45%) vs families with children (27%)
- Women (48%) vs men (34%)

Returning to previously visited places has the advantage of knowing that the destination will be well set up for cycling if the previous experience was positive. Another reason to return to known places is to discover parts that were missed last time.

## **Cycling clubs or informal group of mates**

For those who go away with their club, the club will decide on the destination, usually with input from the members. The members themselves get their ideas of where to vote for from the above mentioned sources.

“Quite often it’s a shortlist or a poll on WhatsApp and democracy rules”  
Male, 45 to 54, adult road cycling

An informal group of mates will typically follow a similar democratic process, either voting on ideas or taking it in turns to be the one who decides. A group may build up an endless ‘wish list’ of places to visit.

High mountain ranges in mainland Europe feature regularly in the ‘votes’ of dedicated road cyclists because they want to tackle the challenging and iconic climbs.

## **Influence of major events**

### **Tour de France coming to Wales in 2027**

In 2027, the first three stages of the Tour de France will take place in the UK, of which one will take place in Wales. In the focus groups, all 6 road cyclists, 3 out of 7 mountain bikers and 3 out of 4 family path cyclists already knew this before being told about it.

Some cyclists of all types are already making plans to watch it as they expect that the route will pass somewhere quite close to where they live in South East Wales.

“I’m hoping it’s going to come very close to Pontypool, being blessed with having The Tumble on our doorstep”  
Male, 45 to 54, adult road cycling

## Do major races influence cycling destination choices?

Dedicated road cyclists often enjoy iconic climbs. What makes a climb 'iconic' can sometimes stem from seeing it featured in a major race such as the Tour de France.

"I've gone out of my way deliberately to go and ride roads that I've seen in the Tour. Every time the Giro [d'Italia] is on, I'm making mental notes thinking 'I'd love to ride that one'."

Male, 55 to 64, adult road cycling

More leisurely cyclists can also be inspired by watching a major race. This raises the profile of the destination.

"If you see it [a major race], it makes you want to be more involved"

Female, 35 to 44, family with children

Some elite races offer amateur cyclists the opportunity to cycle a stage the day before or after the race. Wales could attract visitors for this purpose if feasible.

"The Tour of Britain is coming to Wales in a couple of weeks. We [Mum and 11 year old daughter] are doing the ride the day before."

Female, 35 to 44, adult mountain biking

Coverage of the Tour de France often includes featuring small towns and villages which the race passes through, showing aspects of a location's history and scenery. Some feel that this is Wales' opportunity to showcase itself, more so than the climbs. One cyclist states that some small towns and villages in France spend a lot on trying to attract the Tour to come to them, believing that it will raise their profile as visitor destinations.



Tour of Britain 2023 in Caerphilly

## Interest in more and better infrastructure

For the destination to capitalise on interest generated by hosting a major event, it needs the product in place to make it easy for visitors to return to cycle. Wales already hosts other events but some feel that it hasn't been able to take advantage of interest generated because the product isn't yet ready.

"We have events ... and we attract a lot of cyclists from London and you see them on the big sportives but there doesn't seem to be follow-through ... putting infrastructure in place to make it easy for someone to say: 'I'll go for a week, a long weekend and will base myself in the south Wales valleys for cycling ... secure bike storage, routes, coffee stops ... there's a huge untapped market here that we're not quite getting. Having the Tour will bring people, but there has to be that follow-through with infrastructure in place.'"

Male, 55 to 64, adult road cycling

"There's a balance to be struck. You can't just throw money at bringing these massive sporting events to Wales and then sit back and expect the rest to happen. There has to be some level of investment in infrastructure that caters for various levels of cyclist to that it's accessible for a wide range of people."

Male, 35 to 44, adult road cycling

## Some would rather participate in events than just spectate

Some cyclists cite events in Wales which can inspire people to cycle and visit an area, but they do that through participation rather than only spectating. They would like to see Wales attract events of this kind rather than elite races. Cited examples include *Battle on the Beach* (Pembrey) and *Drum & Bass* (Cardiff).

"Having more events in communities is the way to encourage people to take part ... if you go into your local cycling town, everyone there knows the routes, they've got advice. It's part of the industry; part of the fabric of the area."

Male, 35 to 44, family with children

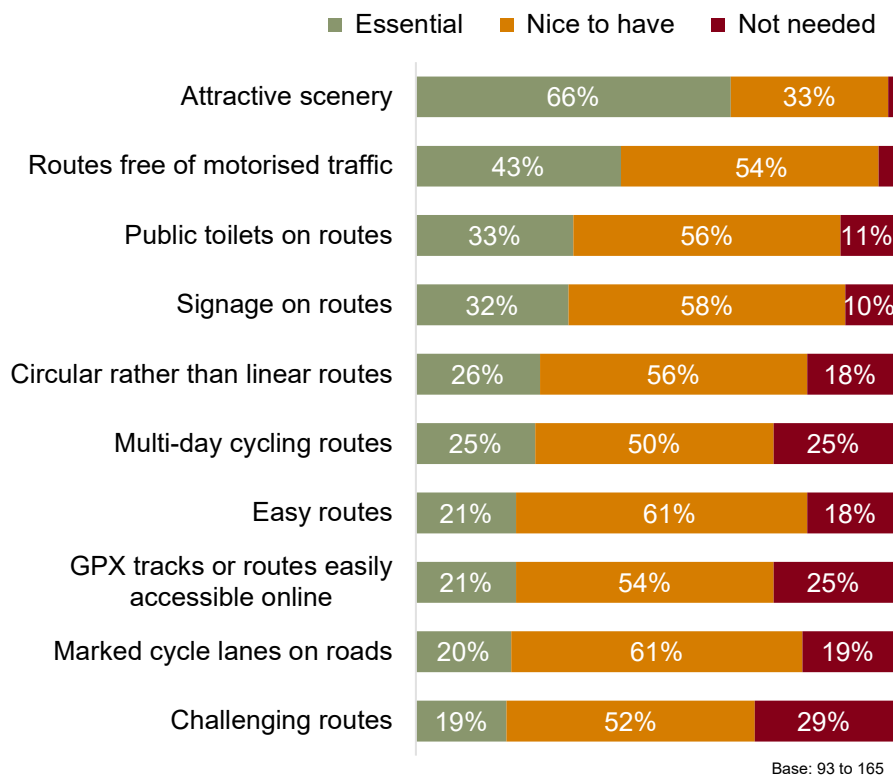
An elite race can include amateur participation if the roads remain closed before or after for others to attempt a stage or part of a stage.



## 5. Priorities for cycling routes and services

### Road and path cycling routes

Figure 4: Q5 “How important are each of the following for good cycling routes?”



Q5 has been asked to all types of cyclist except those most often engaging in mountain biking and event cycling. ‘Routes free of motorised traffic’ has not been asked to those most often engaged in road cycling, and ‘marked cycle lanes on roads’ has not been asked to those most often engaging in path cycling.

### Attractive scenery stands out

‘Attractive scenery’ is the most essential feature for almost every respondent group by trip purpose, cycling type, party type, age and gender. The only exception is that families and those for whom cycling is not the main trip purpose place similar importance on ‘routes free of motorised traffic’ (if not cycling on roads).

‘Attractive’ can mean hills, coastline, green landscape, forests and quaint buildings. Variety is key, as it keeps cyclists interested in what they might discover next. This is especially important for children, as their motivation to keep going can waver after a short time.

“If you have a child sitting in a trailer, what they see around them definitely affects their engagement ... wildlife, different landscapes, places to stop with a little play area”

Female, 35 to 44, family with children

Attractive scenery matters a lot on holidays and breaks because the experience is intended to be uplifting, even if cycling fairly hard or fast. Road cyclists may do their hardest rides

locally with their club as a routine, but when on a break away from home, they are more likely to spend some time sitting up enjoying the new views.

“If I’m out with the club on a Thursday night then I’m doing a chain gang going as fast as we can in a constantly moving line of cyclists, but ... I’ve done north to south [Wales] and I’m taking up the views, planning where my next coffee stop is going to be”

Male, 45 to 54, adult road cycling



Lôn Cambria Cycle Route, Elan Valley, Mid Wales

## Routes free of motorised traffic

Among those not cycling on roads, ‘routes free of motorised traffic’ is the top answer for:

- Those for whom cycling is not the main trip purpose (61% have answered ‘essential’)
- Families with children (59% have answered ‘essential’)

Many cyclists find sharing the route with motorised traffic no fun. Apart from the noise and the effect this has on appreciating the surroundings, the lack of perceived safety in the UK takes enjoyment away.

Families with young children are particularly safety-conscious and tend to seek off-road routes where possible, more so than before they had children. Even a small section of road such as a crossing or where a cycle path ends can cause a lot of stress as they watch out for their children. This is not the holiday experience they seek.

“If you throw children in, there are too many considerations ... if a vehicle passes too close or one of them has a wobble. I’m trying to encourage their independent cycling without having to worry about traffic.”

Female, 35 to 44, family with children



## Challenging routes

The proportion citing 'challenging routes' as 'essential' is higher among:

- Road (26%) and back packing cyclists (26%) compared to path cyclists (7%)
- Men (25%) compared to women (6%)
- Those for whom cycling is the main trip purpose (29%) compared to those who have a different trip purpose (5%)

'Challenging' in road cycling usually means steep hills. Some dedicated road cyclists, more likely to be men, relish the challenge of a steep climb.

"South Wales is one of the best places in the world for cycling. We have such a combination of landscapes down in the vale, the coast, the rolling countryside and proper climbs."

Male, 55 to 64, adult road cycling

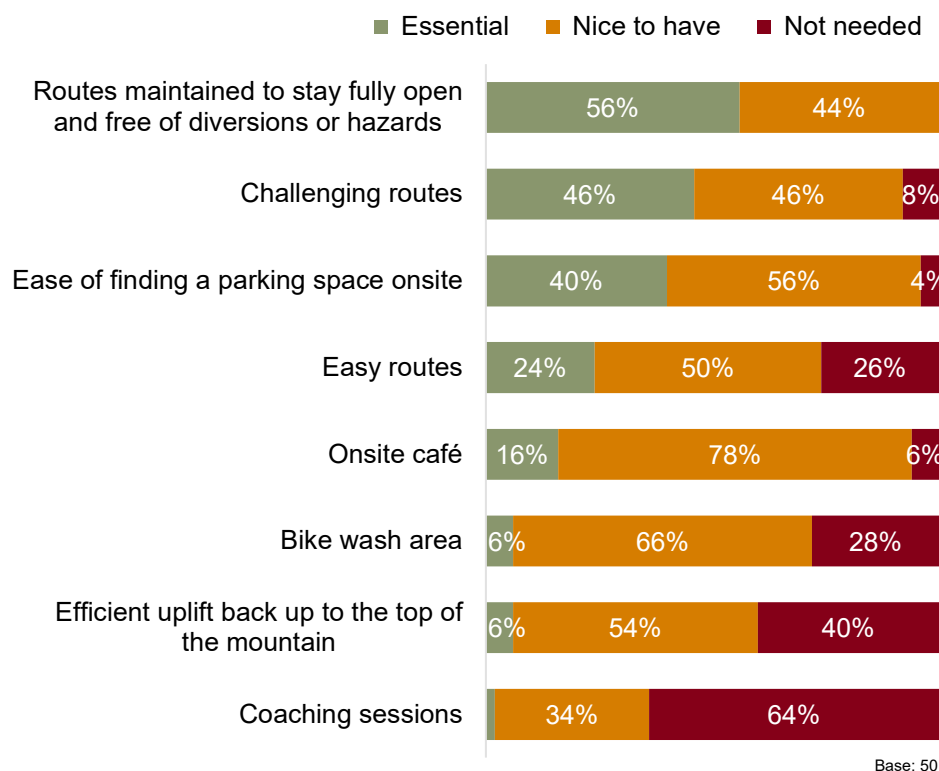
Challenging routes can cause issues for families with young children.

"My youngest is 7. Give him a hill and there's some whinging involved."

Female, 35 to 44, family with children

# Mountain biking trails

Figure 5: Q6 “How important are each of the following for good mountain biking trails and parks?”



Q6 has been asked to those most often engaging in mountain biking. The sample size is not large enough to break down further for analysis by respondent groups.

## Keeping trails open

The top priority for mountain biking trails is maintenance to ensure that they remain fully open. This can be a challenge for destinations at times, such as when trees blow down in storms.

## Challenging vs easy routes

The quantitative data shows that a mountain biking destination needs a full range of difficulty ratings. Skilled mountain bikers are not easily excited by easy routes, but focus group participants have pointed out that easy routes and pump tracks, which are very popular in elsewhere, are needed so that ‘new entrants’ to the activity can be attracted at a young age, who may then grow up progressing through the difficulty ratings.



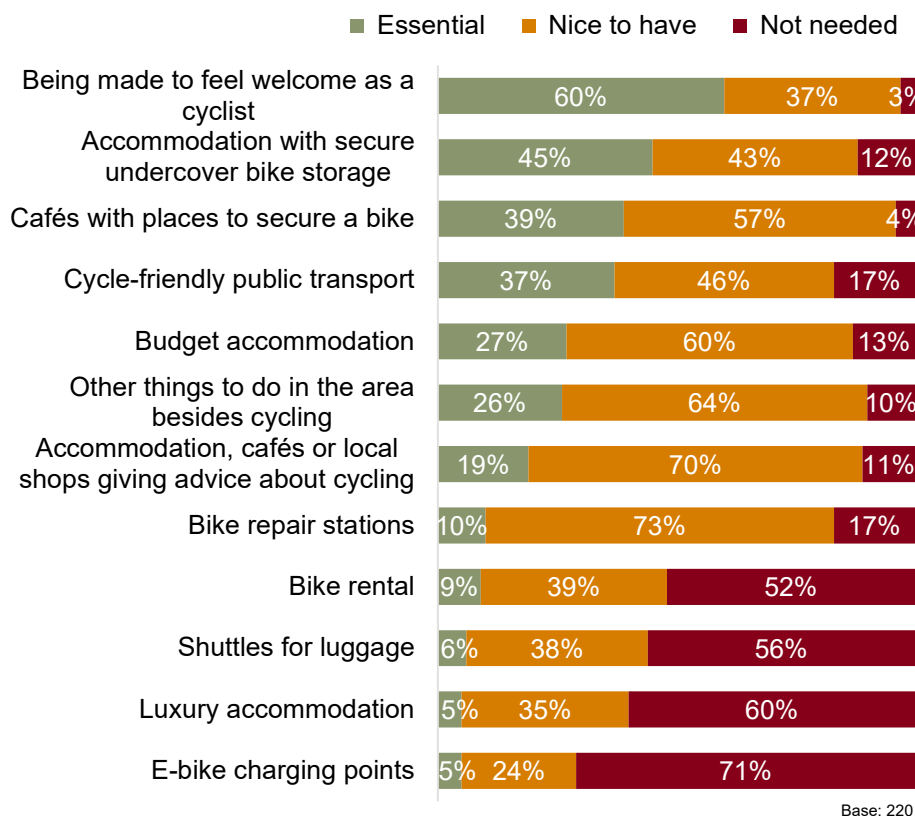
BikePark Wales

## **Efficient uplift back up the mountain**

At a glance, it seems that this ranks low as a priority, but it depends on the type of mountain biking. If biking long distance routes along undulating terrain outside of a designated bike park, uplift is not relevant. But within a bike park using downhill routes, efficient uplift can help the biker make better use of the time. Some cite Alpine resorts as a model example: lifts which transport skiers in the winter are used for mountain bikers in the summer.

## Priorities for services (all cycling types)

Figure 6: Q8 “How important are each of the following services for you?”



### Warm welcome

‘Being made to feel welcome as a cyclist’ is the top answer in every respondent group. Cyclists highlight several key meanings to ‘feeling welcome’:

- Being shown respect by other road users or path users
- Seeing that service providers in an area are set up to meet the needs of cyclists
- Perceiving a friendly attitude towards cyclists among the local population

On the first point, the perceived threat of getting knocked off the bike or the risk of negative interactions with other road/path users may impact on experiences.

If service providers of different kinds, including accommodation, cafés and specialist bike shops are clearly set up for cyclists’ needs, this gives cyclists the impression that the area has invested in this market and therefore makes them feel more wanted.

Some local populations give the impression that they really want cyclists to come and visit their area. They recognise the benefits and this ‘rubs off’ in the way they behave towards cyclists, giving them advice and helping with any needs they may have.

We discuss how Wales fares compared to competitor destinations in more detail in section 6.

## Accommodation and securing the bike

After being made to feel welcome, being able to leave the bike securely, whether at accommodation, a café or any other place visited, is the next priority.

The proportion answering 'essential' for 'accommodation with secure undercover bike storage' is higher among main purpose cyclists (55%) than non-main purpose cyclists (30%). Main purpose cyclists may well have spent a lot on their bike and are highly security conscious about their treasured possession. The accommodation itself can be basic, but it must have the secure bike facility. It is very helpful when properties promote having secure bike facilities so that cyclists don't have to waste time contacting them to ask.

Another feature of 'cycle-friendly' accommodation is that the owners are not fazed by cyclists returning to the property in a less than clean state.

"You need to stay somewhere you know is cycle-friendly and they're not going to roll their eyes when you get back with a muddy bike and they've got somewhere secure to store it so you're not lying awake in bed at night thinking 'someone's going to be nicking my bike'"

Male, 55 to 64, adult road cycling

Accommodation needs to be conveniently located for places to eat (or provide meals) in the evening because after cycling and arriving back, cyclists do not want to have to venture back out on a lengthy journey in search of something to eat.

## Cycle-friendly transport

This is higher among bike-packers (60% rate it as 'essential'). If a destination has an abundance of cycle-friendly transport, it makes planning routes much easier and more flexible. The transport should also have good capacity for bikes without necessarily needing to be booked in advance.

## Other things to do besides cycling

The proportion rating this as 'essential' is higher among:

- Non-main purpose cyclists (47%) vs main purpose cyclists (13%)
- Path & gravel cyclists (47%) vs other cyclist types (19%)
- Families with children (41%) vs adult-only parties (23%)
- Men (30%) vs women (17%)

Many cyclists like to experience more of a destination than just the cycling. They may want to see attractive towns and villages, visitor attractions and spend time enjoying food & drink.

Families with children need plenty of other things to do along a route because the children can lose motivation to continue otherwise. The 'other things' do not necessarily need to be

wildly exciting or involve significant investment. Even something as simple as a natural water feature or a place to buy an ice-cream can suffice.

“The Wye Valley was brilliant to cycle with kids. Our favourite routes are ones with stuff of interest for the kids and cafés or ice-cream so when they inevitably get tired, we can use that to keep going to the playground or the ice-cream shop to motivate them ... we need a point of interest every 2 miles or so. I've always thought a stamp and passport system would work on a route for kids. They pick up the passport booklet at the start of the ride then at every skill track or point of interest they find the stamp press and fill their passport.”

Female, 35 to 44, family with children

## **Bike repair stations**

Bike repair stations or shops are more of a ‘nice to have’, but if a part breaks then this can quickly turn into an ‘essential’ service. Depending on the type of bike, parts can be hard to find unless dealing with a specialist in the field. Mountain bikers do not expect they would find certain special parts in a more general cycling retailer such as Halfords.

## **Planning the route**

Based on the above mentioned priorities, cyclists will plan their routes. This may be done pre-arrival in the destination and the choice of accommodation may depend on the route locations. However, if done post-arrival, the cyclist will need confidence that the destination is well set up for cycling with a good choice of routes. Wales tends to be seen as a ‘plan in advance’ destination, whereas cyclists may be more trusting that some European countries with a strong cycling reputation like France and the Netherlands will have routes and services in the right area that suit them.

“In France, we don’t even have to plan our trip around the cycling as we can just say, ‘we want to go there’ and then we know we’ll find some place within a 20 minute drive that delivers bikes, and the place where we’re staying will have facility to store them”

Male, 25 to 34, family with children

Some cyclists use GPX to plan routes through apps such as Strava or Komoot, or through Sustrans for the National Cycle Network. One focus group participant also relies on the help of AI through Google to find suggested routes.

“You can type into Google things like ‘cycle paths suitable for a 10 year old’ and it [AI] will build that in”

Female, 35 to 44, family with children

Tour operators can be a valuable provider of routes and accommodation options when the destination is less well known for cycling.

“Bicycle Beano [cycling holiday operator] have given an opportunity to explore Wales in an amazing way that I could never have done on my own”  
Female, 65+, adult road cycling

One focus group participant once reached out to a French cycling club to ask for recommended routes. Upon hearing this, the other group participants responded that they would be happy to provide similar support to visitors coming to their area.

“I reached out to a local club [in France] and asked if they could recommend some rides ... I ended up doing a Sunday club run with them!”  
Male, 45 to 54, adult road cycling

If planning a point-to-point route, cyclists need accommodation which will accept one-night bookings. At busier times of the year, this can be hard to find.

“Accepting one-night stays is very important for any destination promoting mountain biking or bike touring”  
Female, 65+, adult mountain biking

## 6. Experiences of Wales and competitor destinations

Here we discuss how cyclists perceive Wales compares to competitor destinations on each of the three main types of cycling in turn: road, path or gravel and mountain biking.

### Road cycling

#### Wales holds much appeal

Many road cyclists feel that Wales could potentially be a very appealing destination, and some say it already is. Wales' appeal is its varied landscape: an abundance of hills, rural scenery and coastline views. This is what road cyclists come away to experience.

“The first time I did a tour of North Wales, I was absolutely blown away by the landscape; really emotionally moved by it”

Female, 65+, adult road cycling

“We followed the Lôn-Las Cymru route from Holyhead to Chepstow: not only an amazing route but very friendly and warm welcomes in each of my planned stops – Caernarfon, Corris and Builth Wells ... The people running our accommodation were amazing: secure storage, recommendations on where to eat, drying facilities ... all the extra ingredients to make a great ride so memorable.”

Male, 45 to 54, adult road cycling

#### Cultural attitudes towards cyclists can be an issue

Some participants have noted issues around ‘friendly welcome’. The consensus is that road cycling abroad is a very different experience compared to the UK in terms of the consideration that drivers and local populations generally pay to cyclists.

“A lot of women won’t cycle on roads because it feels so dangerous and so threatening”

Female, 65+, adult road cycling

“Cycling isn’t embedded in our [UK] culture at all. You go to Belgium, it’s like a national sport. Cyclists are revered.”

Male, 45 to 54, adult road cycling

“There is a car culture across Britain which can make you feel unwelcome road riding ... aggressive driving has changed the way we would ride as a family: close passes ... people just shout at you because they don’t like cyclists.”

Male, 35 to 44, family with children



## Spanish islands and high mountains in Europe are popular

Dedicated road cyclists like to go away on breaks as often as is feasible. Two particularly popular types of destination are:

- Spanish islands, especially Mallorca
- High mountain ranges in Europe, including the Alps, Pyrenees and Dolomites

Mallorca has set itself up to target cycling tourism outside of the summer season. Cyclists feel they have everything they need in terms of good flight access, a wide choice of reasonably priced cycle-friendly accommodation and varied landscape. The respect shown by drivers towards cyclists adds to the feeling of welcome.

“In Mallorca there is masses of bike hire, so that keeps the prices competitive, the roads are fantastic, there’s a huge choice of accommodation as cyclists go in the spring or the autumn ... cheap flights, mountains. What more do you want?!”

Male, 55 to 64, adult road cycling

High mountain ranges offer challenges for the most serious cyclists and the opportunity to tackle iconic climbs. Wales doesn’t have this to the same extent to excite the most serious road cyclists, but it can promote itself in a slightly different way as a place to discover with some mountains that still offer a degree of challenge.

“If you don’t have iconic climbs like in Europe, market it as a discovery: what can you find in Wales?”

Male, 35 to 44, adult road cycling

## Wales needs road cycling ‘hubs’

Some road cyclists feel that mountain bikers can base themselves near a bike park such as BikePark Wales and they are likely to find everything they need in one area for a mountain biking break. They would like to see Wales set up similar hubs which make it easy for cyclists to find everything they need.

“We’ve got the roads, the beautiful views, it’s all there, but people don’t necessarily know where to go to access that ... if we could just package it all up so that someone sitting in London thinking, ‘I’d love to get out onto some proper hills’ can just book a weekend away and know that’s all there for them.”

Male, 55 to 64, adult road cycling

“We have BikePark Wales, which is for mountain bikers. But we need something of that ilk for road cyclists. Somewhere you know will be bike friendly with routes from that central area.”

Male, 55 to 64, adult road cycling



Lôn Eifion, North Wales

## **Path and gravel cycling**

### **Many reasons why visitors should come to Wales**

As with road cycling, path and gravel cyclists see a strong appeal in Wales. Its varied landscape and lack of tourist crowds in many areas give visitors a relaxing experience.

“The Mawddach trail was a challenging distance for our young kids. Cycle path the whole way. Lovely scenery and ending in a lovely town with ice-cream, a beach and shops. My husband cycled back to pick up the van while the kids and I enjoyed the town.”

Female, 35 to 44, family with children

### **But the current product is disjointed compared to other destinations**

Whilst there is an extensive range of off-road cycle paths that visiting cyclists enjoy, the product is felt to be a bit disjointed compared to other cycling destinations. This is consistent with the views of stakeholders in Wales, as reported in the Cycling tourism development research earlier in 2025.

Countries such as France, Belgium, the Netherlands and Germany are thought to have cycling well engrained in their cultures. Their off-road paths are well connected without some of the awkward moments that cyclists in Wales come across like a path suddenly ending or a gate that's not fully accessible. Service providers are set up for cyclists' needs, routes are very easy to find and navigate, and locals have bought into the practice of welcoming cyclists to their region.

“The Netherlands was a fantastic cycling holiday. Cycle routes were gloriously straightforward; very rarely put me or the kids in conflict with car drivers and we were made to feel very welcome by other riders.”

Male, 35 to 44, family with children

Wales has much product already in place, but cycling visitors feel it lacks the ‘overall package’ to make it easy to plan a full trip.

“In Wales, I know we would stay somewhere and then have to drive another five miles to get tea. We just can’t do that at the moment.”

Male, 35 to 44, family with children

## Mountain biking

### Wales has the makings of a world-class destination

Mountain bikers believe that Wales has the natural topography of hills and forests for a world-class destination. Its added advantage over the popular region of the French Alps is that there is not much snow in the winter and so mountain biking can be enjoyed in Wales for more of the year. This is consistent with the views of stakeholders in Wales, as reported in the Cycling tourism development research earlier in 2025. There is also a view that cyclists are starting to come over to Wales from southern Europe in the summer to escape the heat.

“Wales is already a world-class cycling destination”

Male, 65+, adult mountain biking

“BikePark Wales is a very enjoyable cycling experience as this place is well thought-out with excellent trails, uplift, café and shop”

Female, 55 – 64, adult mountain biking



Glyndŵr's Way, Dylife, Mid Wales

## Issues to address

If Wales is to fulfil its potential of becoming a world-class mountain biking destination, the trails need to be updated and maintenance needs to be improved. As discussed earlier, keeping routes open and free of hazards or diversions is the top route priority for mountain bikers, but this is a weakness of Wales' current offering. Routes following a bridleway may suddenly turn into a footpath. This is consistent with the reported views of stakeholders.

Whilst Wales has many mountain bike trails, some are now considered old-fashioned because they were built when bike suspension was in its infancy. Also, some mountain bikers strongly prefer hand-built trails to machine-built ones.

“When those trails [e.g. Coed-y-Brenin] were originally built, front suspension was in its infancy, but seeing the modern development of bikes, it's amazing what you can ride nowadays”

Female, 55 to 64, adult mountain biking

Some public transport in Wales accepts bikes, but capacity can be limited or may need to be booked in advance. This can hinder mountain bikers when planning their routes for the break.

Wales is perceived to have a lack of bike shops which specialise in parts and repairs for mountain bikes. However, some admit that the issue is 'chicken and egg' in that there needs to be enough demand in an area for commercial businesses to be viable.

In all, the full package is needed in key mountain biking areas in Wales, as currently there are good aspects of the product which are let down by other aspects.

## **7. Implications for Visit Wales and partners**

### **Significant potential as a cycling destination**

Cyclists confirm what was reported in the Cycling tourism development research with stakeholders: Wales has significant potential as a cycling destination. Its varied, scenic landscape gives cycling visitors the experience they are looking for. This applies to all types of cycling.

### **Creating the full package**

For Wales to fulfil its potential as a world-class cycling destination, the full package of products and services needs to come together in a similar way that cyclists experience in other destinations:

- Well maintained routes which are easy to find and navigate
- Range of accommodation close to routes which offers secure bike storage and welcomes cyclists
- Bike hire in key route locations
- Places to eat and drink along routes which offer places to secure bikes
- Public transport with good capacity to accept bikes
- Repair shops close to routes

In addition to cycling products and services, Wales needs its local populations in key areas to understand and embrace the importance of cycling tourism. A destination which openly welcomes cyclists, offers them advice, helps them with their needs and treats them with respect on roads and paths is a destination that cyclists will want to keep revisiting.

### **Influence of major events**

#### **Tour de France**

The Tour de France is coming to Wales in 2027, and Wales should embrace this opportunity to promote itself as a cycling destination. Cyclists have raised the point that the full cycling 'package' (discussed above) needs to be in place in Wales if visitors are to be attracted back again to cycle.

## **Further types of event**

Some cyclists would prefer that Wales attracts a different type of event:

- If an elite competition, then off-road such as cyclo-cross or downhill, as they feel these events are more exciting to watch than road cycling
- Participatory events, so that more people are engaged in cycling rather than just spectating

## **Many willing partners in Wales**

As a reminder of the stakeholder findings published in the Cycling tourism development research, Wales has many public and private organisations which are willing to work together in making Wales a world-class cycling destination. The interest from consumers is there; it just needs the full package bringing together and promoted.