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WALES NATIONAL TRAVEL SURVEY

Wales National Travel Survey: Cycling results, 2025/26

This report outlines a selection of results from the first twelve months of data collection for the Wales National Travel Survey 2025/26 (WNTS). These results are based on over 6,100 responses and 18,000 journeys recorded from across Wales. These data are official statistics in development.

This report focuses on travel by cycle. It brings together information on how people travel, and their attitudes and opinions on cycling.

The WNTS is a new survey, and the first national travel survey for Wales since 2012. Care should be taken when considering the results alongside other data sources. Differences could be due to different definitions used, differing survey methodologies or genuine differences in travel behaviour.

This publication is based on the first survey year, with data collected from sample batches from March 2025 to February 2026. Quality information can be found in our Quality Report.

Several transport-specific terms have been used in this report. We have produced a definitions document to aid understanding.

Main findings

- We estimate that 1.4% of journeys per person per year were made by cycling.
- 9.3% of respondents reported cycling at least once a week. 76.8% of respondents reported not cycling at all in the last twelve months.
- 88.6% of cycling journeys were made by the 9.3% of respondents who cycled at least once per week.
- 66.3% of cyclists were either very or fairly satisfied with their overall journey.
- "More routes away from traffic" was the most popular factor that would encourage cyclists to cycle more often (46.9%).
- 83.4% of cycling journeys were completed by male respondents.

A note on the data

The results presented in this report and in the supporting tables are estimates based on the behaviour and opinions of respondents. The data have been weighted to be representative of the Welsh adult population.

These estimates are subject to a degree of uncertainty. This level of uncertainty is greater for smaller groups and less common travel modes. For instance, estimates for South East Wales are based on 2,825 respondents, compared to 665 from Mid Wales, meaning estimates for Mid Wales are subject to greater uncertainty. However, the survey still provides reasonable estimates for these smaller population groups.

More information on the accuracy and precision of these estimates can be found in the Accuracy section of the Quality Report.

For some questions, respondents could select up to three response options so totals may not add up to 100%.

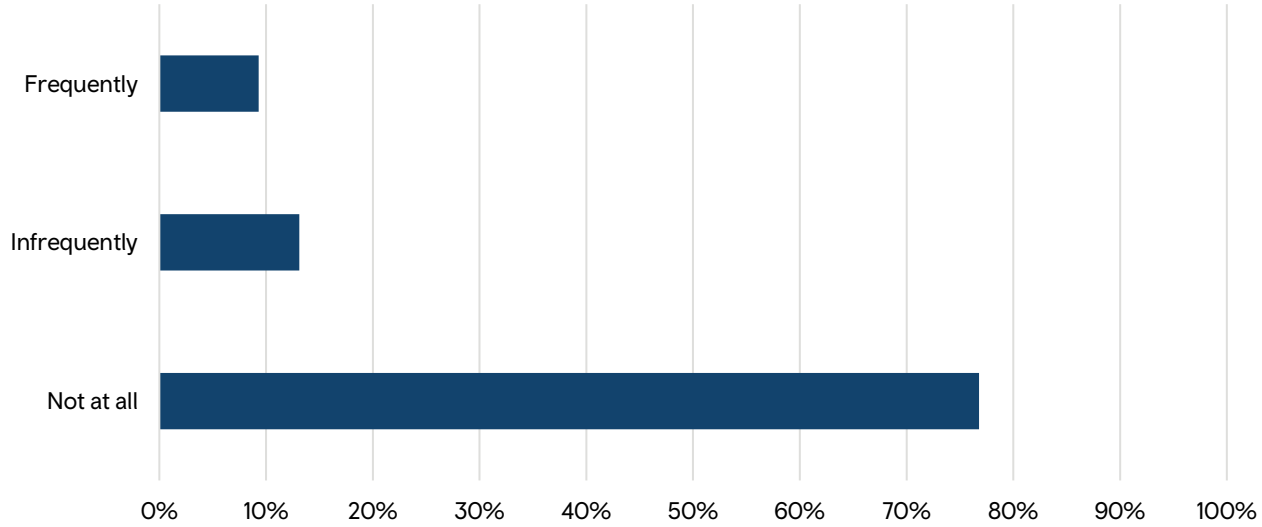
Frequency of cycle travel

The travel frequency questions measured how often a person cycled within the last twelve months. This differs from mode share, which is the share of journeys per person per year made by cycle.

- 9.3% of respondents reported cycling at least once a week (3.0% most days, 3.3% several times a week and 3.0% once a week).
- 13.1% of respondents cycled infrequently (3.3% once or twice a month, 3.7% once every couple of months, and 6.2% once or twice during the year).
- 76.8% of respondents reported not cycling at all.

Cycling: travel frequency

Figure 1: How frequently respondents cycled over the last twelve months, Wales, 2025/26



Description of Figure 1: A bar chart showing the percentage of respondents who reported cycling frequently, infrequently or not at all. 76.8% of respondents reported not cycling at all. 9.3% of respondents reported cycling frequently and 13.1% reported cycling infrequently.

Source: Wales National Travel Survey, travel frequency

Sex of the respondent

- A higher proportion of male respondents (13.3%) reported cycling at least once per week compared to 5.8% of female respondents.

Disabled status

- 7.1% of disabled respondents reported cycling at least once per week compared to 10.0% of non-disabled respondents.
- There was a 9.9 percentage point difference in the share of disabled and non-disabled respondents who did not cycle at all. 84.8% of disabled respondents reported not cycling at all in the last twelve months, compared to 74.9% of non-disabled respondents.

Age group

- Cycling at least once per week decreases as age increases, from 12.9% of those aged 16-24 to 3.3% of those aged 85 or above.

Ability to cycle

Respondents who reported not cycling at all in the last twelve months (76.8%) were asked if they were able to ride a pedal cycle.

- 67.0% of these respondents reported being able to cycle, whilst 30.6% reported not being able to (23.5% of all respondents).
- More male respondents were able to cycle (73.3%) than female respondents (62.5%).

Cycle ownership

Respondents who reported cycling at least once or twice during the year (22.5%) were asked about the type of cycles they own or have regular use of.

- Just over half of respondents (52.1%) reported they do not own or have regular use of any types of cycle.
- 42.8% of respondents reported owning or having regular use of a pedal cycle, 5.7% an e-bike and 0.5% use a bike hire scheme if they want to cycle.

Main mode share

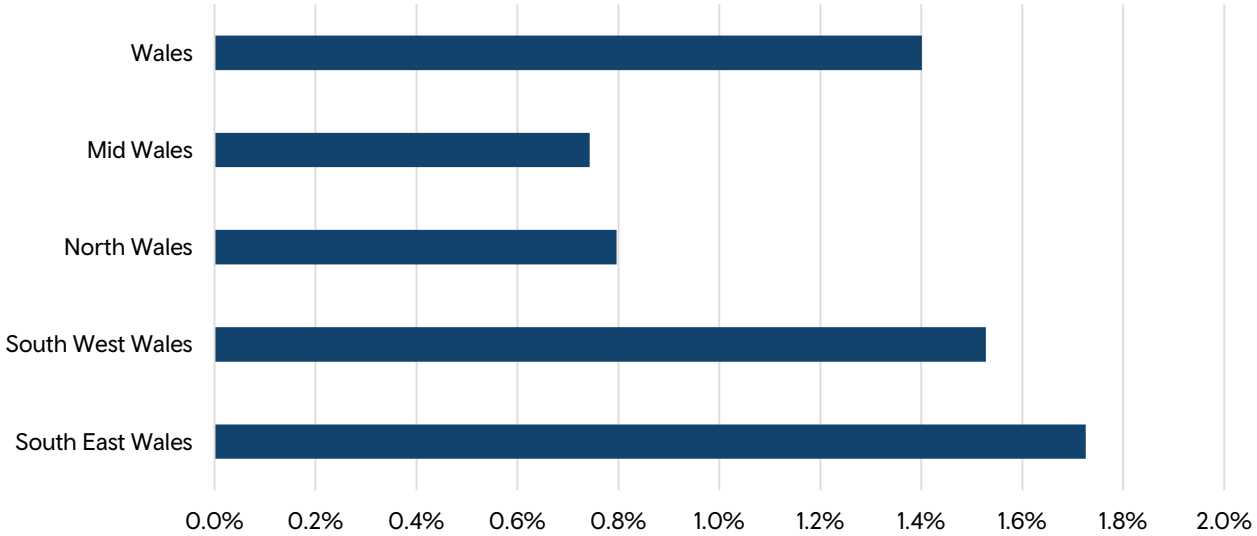
The main mode of travel refers to the mode that was used for the longest distance in a journey. Mode share is the percentage of journeys per person per year completed by a given main mode.

In 2025/26, we estimate that respondents made 8.7 journeys per person per year by cycle.

- Overall, we estimate that 1.4% of journeys were made by cycle. This accounted for 7.4% of all active travel journeys (118.2 journeys per person per year) in 2025/26.
- 1.6% of journeys by residents of urban areas were made by cycle, compared to 0.9% of journeys by those in rural areas.

Cycling: Main mode share by region

Figure 2: Share of journeys per person per year by cycle, Wales, 2025/26



Description of Figure 2: A horizontal bar chart showing the share of journeys per person per year by cycle. 1.7% of journeys in South East Wales and 1.5% of journeys in South West Wales were made by cycle, above the national average (1.4%).

Source: Wales National Travel Survey, main mode share

Main mode share by travel frequency

- Cycle journeys were mostly made by a small share of the population. Frequent cyclists (those who cycle at least once per week) account for 9.3% of respondents but made 88.6% of all cycle journeys. These frequent cyclists made 14.0% of their journeys by cycle (82.8 journeys per person per year)
- 13.1% of respondents were identified as infrequent cyclists. These respondents cycled 0.6% of their journeys (3.8 journeys per person per year) and accounted for 5.7% of all cycle journeys.

Main mode share by Wales Index of Multiple Deprivation

The Wales Index of Multiple Deprivation (WIMD) 2025 ranks the relative deprivation of small areas in Wales. For this analysis, the WIMD ranks have been grouped into quintiles (five groups of equal size). Quintile 1 (Q1) has the 20% most deprived areas of Wales. Quintile 5 (Q5) has the 20% least deprived areas of Wales. Information of how WIMD defined deprivation can be found on the Welsh Government website.

- Residents of Q1 made 0.9% of journeys by cycle, whereas respondents living in Q5 made 2.0% of journeys by cycle.

- Respondents living in Q2 made 1.7% of journeys by cycle, with 1.2% of journeys in Q3 and 1.1% of journeys in Q4 made by this mode.

WIMD is an index of eight separate types of deprivation. These are referred to as deprivation domains. Alongside the overall WIMD quintiles, we have also undertaken analysis of travel behaviours by the income domain and the access to services domain.

The income domain (hereafter income deprivation) measures the proportion of people experiencing deprivation related to low income.

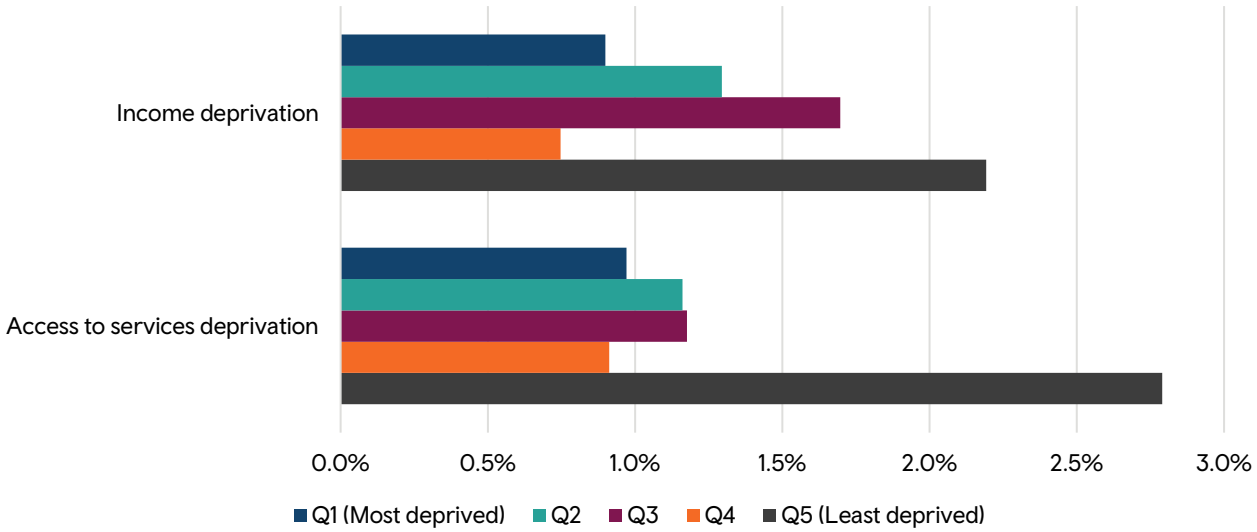
The access to services domain (hereafter access to service deprivation) captures a household's inability to access services necessary to day-to-day living. It, includes material deprivation (such as, being unable to get food) and social aspects of deprivation (such as, not being able to attend after school activities).

More information on these domains can be found in the WIMD 2025 technical report.

- Cycle use tends to increase as income deprivation falls.
- There was no clear trend by access to service deprivation.

Cycle main mode share: By income and access to service deprivation

Figure 3: Share of journeys per person per year by income deprivation and access to service deprivation quintiles, Wales, 2025/26



Description of Figure 3: Horizontal bar chart showing the percentage of journeys made by cycle across five quintiles of income deprivation and access to services deprivation, from the most deprived (Q1) to the least deprived (Q5). For income deprivation, the percentage generally increases towards the less deprived quintiles, with a lower value in Q4. For access to services deprivation, Q1 to Q4 have similar percentages, while Q5 is noticeably higher.

Source: Wales National Travel Survey, main mode share

Main mode share by the sex of the respondent

- Of the cycle journeys recorded in 2025/26, 83.4% were completed by male respondents.
- We estimate that male respondents made 15.6 journeys per person per year by cycle (2.4% of all journeys).
- Female respondents made on average 2.6 cycle journeys per person per year and made less than 0.5% of all journeys by cycle.

Main mode share by disabled status

- Non-disabled respondents made 11.4 journeys per person per year by cycle (1.7%), compared to only 3.8 journeys per person per year (0.7%) by disabled respondents.

Main mode share by age group

- Younger respondents made a greater share of journeys by cycle than older respondents. Individuals aged 16-24 made 4.1% of their journeys by cycle, the largest share of all age groups.
- Respondents aged 25-44 made 1.5% of their journeys by cycle, those aged 45-64 made 1.2% of journeys by cycle, with older groups travelling by this mode even less.

Multimodal journeys

A multimodal journey is where two or more modes of travel are used for a single journey. The main mode is the mode of travel used for the longest distance of the journey. Other modes used as part of the journey are defined as additional modes. More details on multimodal journeys can be found in our definitions.

In 2025/26, we estimate that 10.5% of all journeys were multimodal (65.4 journeys per person per year).

- Cycling rarely featured as part of multimodal journeys. Cycling was used as an additional (non-main) mode of travel in 3.8% of all multimodal journeys, and as the main mode in 1.2% of multimodal journeys.
- Combining journeys as the main mode (1.4%) and as an additional mode (less than 0.5%) of travel, a cycle was used in 1.8% of all journeys in 2025/26.
- 1.8% of journeys to and 1.7% of journeys from railway stations were by cycle.

Journey distance

The journey distance by cycle is the length of the most direct, possible route between the origin and destination. It is not measured as a straight line from the origin to destination.

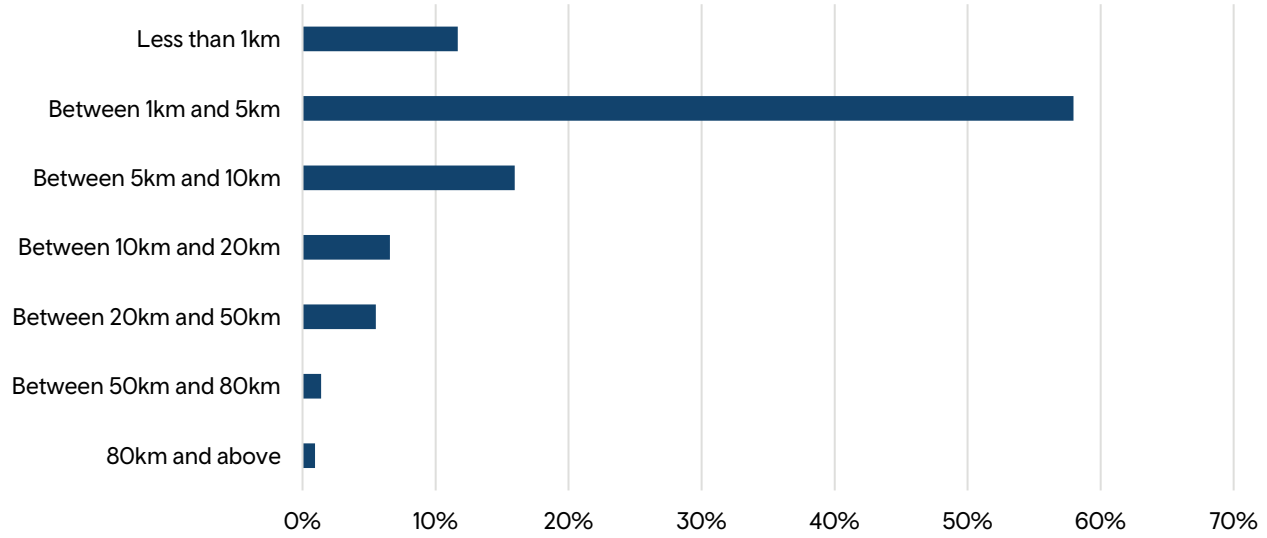
More information on how we have calculated distances can be found in our definitions.

In 2025/26, we estimate that across all modes the mean journey length was 15.5km, with a median journey length of 5.8km.

- Cycle journeys were typically shorter than average journeys, with a mean journey length of 7.2km and a median journey length of 3.7km.
- We estimate that people travelled 63.2km per person per year by cycle. This accounted for 0.7% of the total distance travelled per person per year (9,670.6km).
- Cycling journeys accounted for 26.5% of the total distance travelled by active travel modes (238.7km per person per year).
- The majority of cycling journeys (58.0%) were between 1km and 5km in length. 11.7% of cycle journeys were shorter than 1km, whereas 15.9% were between 5km and 10km long.
- An important measure of active travel use is their share of journeys under one mile (1.61km) and under five miles (8.05km). These distances are identified in the Active Travel Act Guidance as reasonable distances that could be travelled by active travel modes. Cycling journeys accounted for 1.6% of journeys under one mile long, and 1.9% of journeys under five miles long.
- Respondents identified as frequent cyclists travelled 554.4km per person per year by cycle, which accounted for 5.6% of their total distance travelled per year. Frequent cyclists accounted for 82.0% of the total distance travelled by cycle in 2025/26.
- For infrequent cyclists and non-cyclists, their share of total distance by cycle was much smaller. These groups accounted for less than 0.5% of their total.

Cycling: Share of journeys by distance

Figure 4: Share of cycle journeys by distance group, Wales, 2025/26



Description of Figure 4: A horizontal bar chart showing the share of journeys per person per year by distance groups. Over 50% of cycle journeys are between 1km and 5km.

Source: Wales National Travel Survey, distance travelled

Journey purposes

The 'purpose of the journey' is the main reason why a respondent was travelling. Often, this is based on the activity undertaken at the origin or destination of the journey. Where a respondent selected 'return home' from their location as the reason for their journey, we've used the purpose at their previous location for the journey purpose.

Journeys purely for leisure, where the act of travelling is the leisure activity (for instance, going for a run or playing sport) are excluded. This is aligned with the Active Travel Act Guidance definition of utility journeys.

The travel to a destination where a leisure activity is undertaken (for example, travelling to the gym or to a park to play sport) are included. More information about what journeys were included can be found in our definitions.

- The most popular purpose for cycling journeys was travelling to exercise or to play sports. This was the purpose for nearly a third (32.7%) of all cycle journeys. In comparison, across all modes journeys to exercise or play sports was the purpose for only 10.1% of journeys.
- Commutes were also popular, accounting for 28.1% of cycle journeys, compared to 19.3% of all journeys overall.

- Journeys for shopping, the most common purpose overall, ranked third among cycle journeys (11.6%).

Experience when cycling

We asked cyclists additional questions about their experience on their most recent cycle journey. We have defined cyclists as any respondent who reported having cycled at least once every couple of months. This corresponded to 16.3% of all respondents.

Overall journey satisfaction

- 66.3% of respondents reported feeling very or fairly satisfied with their overall journey (23.0% very satisfied and 43.3% fairly satisfied). 13.7% reported feeling dissatisfied (11.0% fairly dissatisfied and 2.7% very dissatisfied).
- 55.4% of female respondents reported feeling satisfied compared to 72.0% of male respondents – a 16.6 percentage point difference.
- There was a 20.0 percentage point difference between the share of non-disabled respondents that felt satisfied with their overall journey compared to disabled respondents (71.4% compared to 51.4%).
- Respondents in Mid Wales reported feeling the most satisfied with overall journey at 76.1%, followed by South West Wales (70.9%) and North Wales (70.4%) and South East Wales at 61.0%.
- In general, satisfaction with overall journey decreased as age group increased, from 79.3% for those aged 16-24 to 53.8% for those aged 75+.

Satisfaction with safety

- 59.4% of respondents reported feeling satisfied with their safety (19.1% very satisfied and 40.2% fairly satisfied). 16.5% reported feeling fairly dissatisfied and 4.5% reported very dissatisfied.
- 48.5% of female respondents reported feeling satisfied compared to 65.2% of male respondents – a 16.7 percentage point difference.
- There was a 15.9 percentage point difference between the share of non-disabled and disabled respondents who felt satisfied with safety (62.6% compared to 46.7%).

Satisfaction with features of cycling journeys

Cyclists were randomly assigned to answer questions on either satisfaction on their most recent journey with the availability of information and cycle routes and connections or on cycle parking facilities and the condition of the path or road surface.

Satisfaction with the availability of information

- 55.3% of respondents reported feeling satisfied, and 19.8% dissatisfied, with the availability of information.
- 59.7% of male respondents were satisfied with the availability of information on their most recent cycling journey, compared to 49.4% of female respondents – a 10.3 percentage point difference.

Satisfaction with cycle routes and connections

- 51.1% of respondents were satisfied, and 27.9% dissatisfied, with routes and connections. their most recent cycle journey.
- 37.6% of female respondents were satisfied with cycle routes and connections. This is 19.8 percentage points lower than the 57.4% of male respondents who were satisfied.

Satisfaction with cycle parking facilities

- Cycle parking facilities had the lowest reported satisfaction across all factors. 46.1% of respondents were satisfied with cycle parking facilities. 33.1% of respondents were dissatisfied.

Satisfaction with the condition of the path or road surface

- 49.5% of respondents reported feeling satisfied with the condition of path or road surface. 33.8% were dissatisfied.

Feeling of welcomeness

- 66.9% of respondents reported feeling welcome on their most recent journey (25.1% very and 41.8% fairly welcome). 14.7% of respondents reported feeling unwelcome (3.1% very and 11.5% fairly unwelcome).
- 57.7% of female respondents reported feeling welcome while 72.1% of male respondents reported feeling welcome – a 14.4 percentage point difference.
- There was a 15.1 percentage point difference between the share of non-disabled and disabled respondents that felt welcome on their most recent cycling journey (70.3% non-disabled respondents, 55.2% disabled respondents).
- Respondents in Mid Wales reported feeling the most satisfied with welcomeness at 79.5%, followed by North Wales (73.8%) and South East Wales (72.2%). South East Wales was the lowest at 59.6%.

Why respondents felt unwelcome

14.7% of cyclists reported feeling unwelcome on their most recent cycling journey. We asked these people about why they felt unwelcome.

- 75.8% of respondents reported they felt unwelcome because of “motor vehicles”.

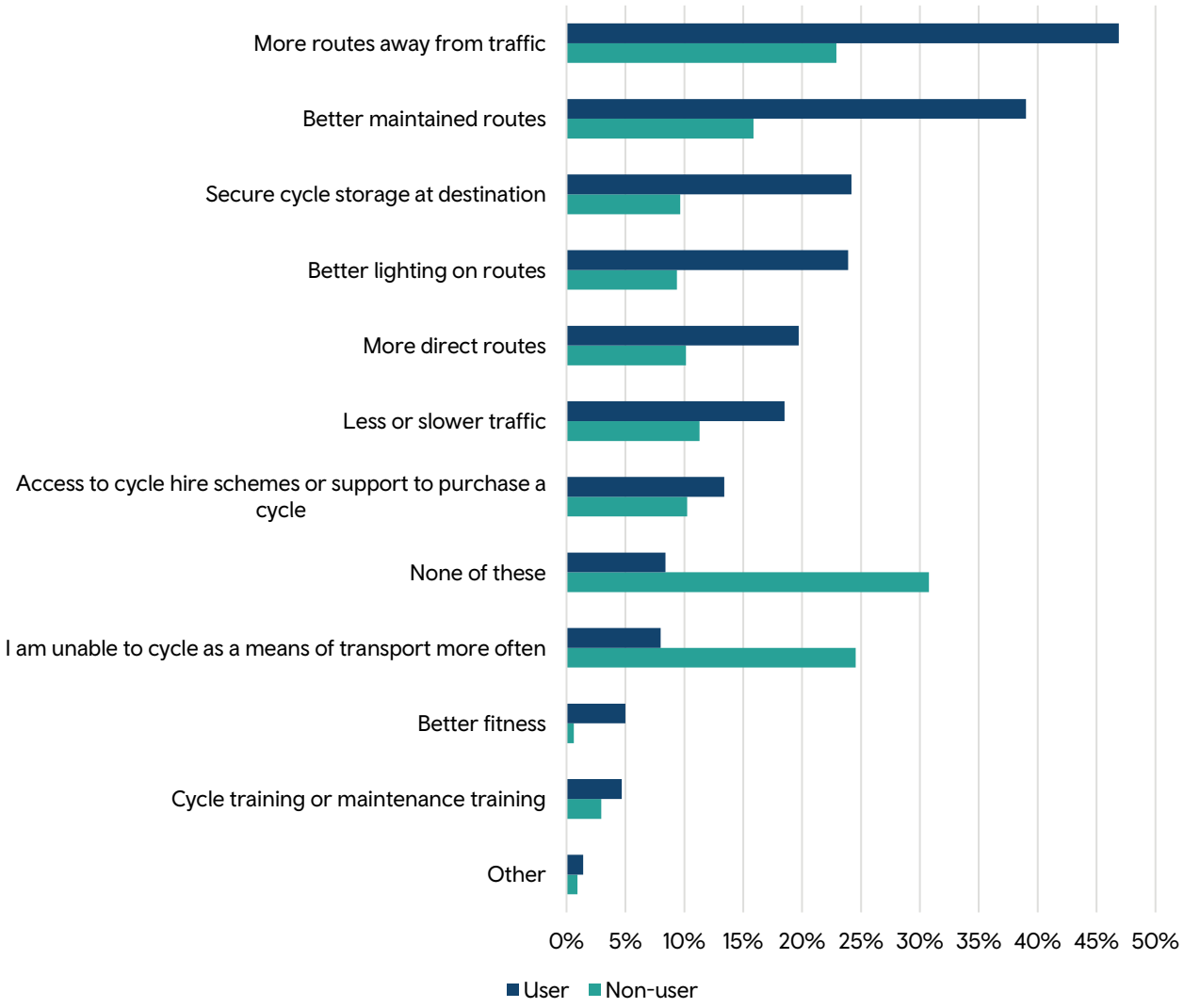
- This was followed by "your surroundings" (37.8%) and other "cyclists or people walking or wheeling" (17.1%).

Factors that would encourage cyclists to cycle more often

- 19.5% of respondents were considered cyclists
- The most popular factors that would encourage more cycling were "more routes away from traffic" (46.9%), "better maintained routes" (39.0%) and "secure cycle storage at destination" (24.2%).

What would encourage people to cycle

Figure 5: Factors that would encourage people to cycle, Wales, 2025/26



Description of Figure 5: A horizontal bar chart showing the factors that would encourage people to cycle more often. The most common response for cyclists was "more routes away from traffic" (46.9%), while the most common responses for non-cyclists were "none of these" (30.8%) and being unable to cycle more often (24.5%).

Source: Wales National Travel Survey, factors to encourage modal shift to sustainable modes of travel

Note 1: Based on the travel frequency described by respondents, 1,085 (19.5%) individuals were identified as cyclists and 4,840 (76.8%) were identified as non-cyclists.

Sex of the respondent

- Both "more routes away from traffic" and "better maintained routes" were the most commonly selected factors for both male and female respondents.
- 24.7% of female respondents selected "secure cycle storage at destination" as the third most common factor whilst 25.2% of males selected "better lighting on routes" as the third most common factor.

Disabled status

- The same most popular factors were selected by disabled and non-disabled respondents.
- A higher proportion of non-disabled respondents selected "better maintained routes" and "more routes away from traffic" (41.5% and 48.7%) than disabled respondents (34.7% and 41.3%).

Regions

- Across the regions, "more routes away from traffic" and "better maintained routes" remained the top two factors at similar proportions.
- The third most common factors differed, with respondents in South East and South West Wales selecting "secure cycle storage at destination" (28.3% and 24.7%). 31.1% of respondents in Mid Wales selected "less or slower traffic" and 19.1% of respondents in North Wales selected "more direct routes".

Factors that would encourage non-cyclists to cycle more often

- 76.8% of respondents were considered non-cyclists.

- 30.8% of non-cyclists reported that none of the factors listed would encourage them to cycle more often. A further 24.5% said that they were unable to cycle as a means of transport more often.
- "More routes away from traffic" was selected by 22.9% of non-cyclists as a factor that would encourage them to cycle more often.

Disabled status

- A higher proportion of disabled respondents selected "I am unable to cycle as a means of transport more often" (43.5%) than non-disabled respondents (18.1%).
- Among other options, a higher proportion of non-disabled respondents selected "more routes away from traffic" and "better maintained routes" than disabled respondents (27.0% and 18.4% of non-disabled respondents compared to 13.4% and 9.2% of disabled respondents).
- "None of these" remained a high proportion for both disabled and non-disabled respondents at 30.0% and 30.2% respectively.

Age group

- For respondents in age groups 16-24 and 25-34, the third most common factor was "better maintained routes at 20.2% and 23.1% respectively. For age groups between 35-44 and 65-74 response options aligned, with some variation in proportion, to response options selected by overall non-cyclists.
- The proportion of respondents selecting "I am unable to cycle as a means of transport more often" increases as age groups increase from 14.7% of those aged 16-24 to 67.0% of those aged 85 or above.