

## Factors to encourage modal shift to sustainable travel modes: headline results

### March to August 2025 (provisional)

This report outlines a selection of results from the first six months of data collection for the Wales National Travel Survey 2025-26 (WNTS). These results are based on over 3,000 responses from people across Wales. They are published as official statistics in development.

This report focuses on questions about modal shift. By this, we mean what would encourage respondents who are users and non-users of certain travel modes to use them more often, as well as the reasons why respondents choose to travel by car.

For information about how we defined users and non-users, please see our [definitions document](#).

Response options differed between each mode so that they were relevant and specific to that mode of travel. More information on the response options provided can be found in the [questionnaire script](#). Respondents could select up to three options, so percentages may not sum to 100%.

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 data collected from sample batches from March to August 2025. As such, they may be affected by seasonal patterns in travel behaviour. Further quality information can be found in our [Quality Report](#).

### Main findings

- “Better maintained routes” (37.3%) was the most common factor that would encourage users to travel by walking and wheeling more often.
- 50.3% of cycle users responded that “more routes away from traffic” would encourage them to travel by cycle more often.
- 42.0% of bus users would be encouraged to travel by bus more often if there was “better route, bus stop and timing information”.
- 59.2% of rail users identified “cheaper, simpler tickets” as a factor that would encourage more travel by rail.
- Among non-users, over 30% of respondents told us that none of the options listed would encourage them to travel by walking and wheeling, cycle, bus and rail.

# Factors that would encourage walking and wheeling

## Walking and wheeling users

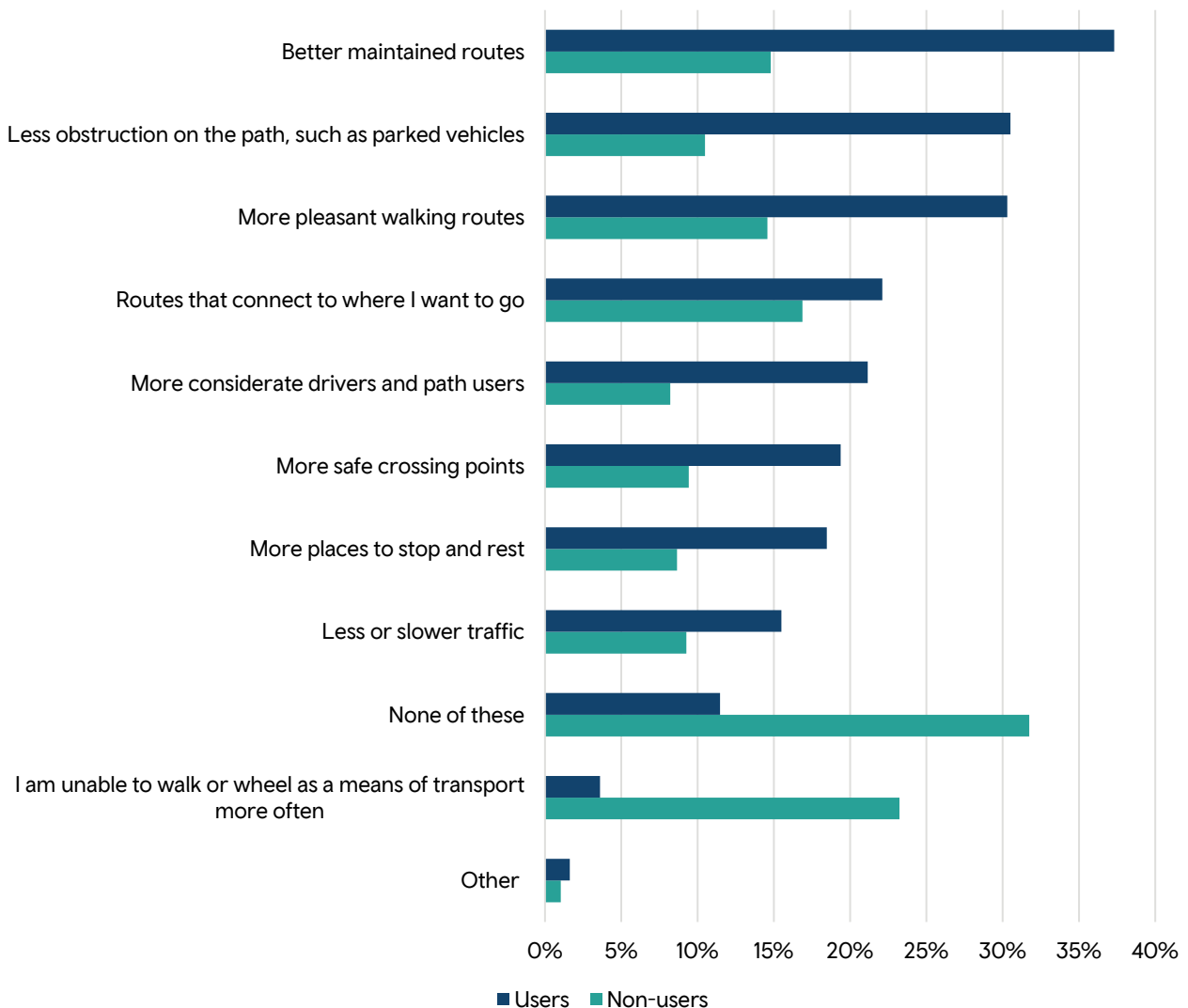
- The most popular factor that would encourage more walking and wheeling was “better maintained routes” (37.3%), followed by “less obstructions on the path, such as parked vehicles” (30.5%) and “more pleasant walking routes” (30.3%).
- There were little differences by sex, with male and female respondents answering in a similar way.
- Among disabled respondents, “better maintained routes” (34.8%) and “less obstruction on the path, such as parked vehicles” (34.0%) were also the top choices. The third most selected option by disabled respondents was “more places to stop and rest” (25.5%), compared to only 15.8% by non-disabled respondents.

## Walking and wheeling non-users

- 31.7% of respondents who did not use walking and wheeling travel indicated that none of the factors listed would encourage them to use the mode. This was the most commonly selected response option.
- A further 23.2% indicated that they were “unable to walk or wheel as a means of transport more often”.
- “Better maintained routes”, the most commonly selected factor for walking and wheeling users, was selected by only 14.8% of non-users as a factor that would encourage walking and wheeling.

# What would encourage people to travel by walking and wheeling

Figure 1: Factors that would encourage users and non-users of walking and wheeling, Wales, 2025



Description of Figure 1: A horizontal bar chart showing the factors that would encourage users and non-users to walk or wheel more often. The most common response for users was “better maintained routes” (37.3%), while the most common responses for non-users were “none of these” (31.7%) and being unable to walk or wheel more often (23.2%).

Source: Transport for Wales – Wales National Travel Survey

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Note 1: Respondents could select up to three options, so percentages may not sum to 100%.

Note 2: Based on the travel frequency described by respondents, 2,445 individuals were identified as users of walking and wheeling. 630 were identified as non-users.

# Factors that would encourage cycling

## Cyclists

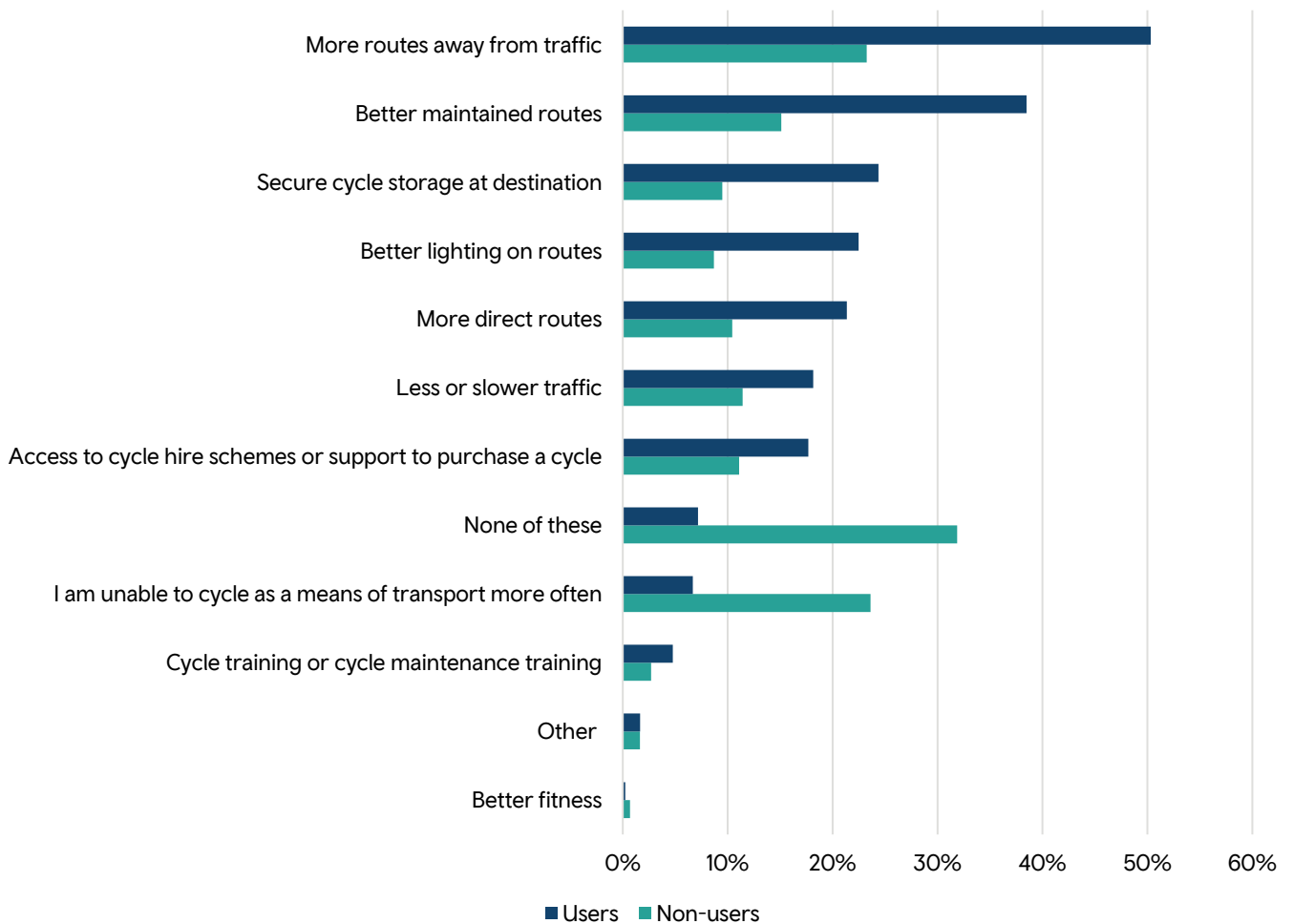
- Among cycle users, 50.3% of respondents said that “more routes away from traffic” would encourage further use. “Better maintained routes” was selected by 38.5% of cycle users, followed by “secure cycle storage at destination” (24.4%).
- There were little differences between the factors that would encourage more cycle use by sex. Female cyclists selected “more direct routes” as the third most popular factor (27.5%), after “more routes away from traffic” and “better maintained routes”.
- “More routes away from traffic” (40.8%), “better maintained routes” (28.0%) and “Secure cycle storage at destination” (24.4%) were also the three most common factors that would encourage disabled users to cycle more often.

## Non-cyclists

- 31.9% of non-users responded that “none of these” factors would encourage them to cycle. A further 23.6% indicated that they are “unable to cycle as a means of transport more often”.
- 23.2% of non-users indicated that “more routes away from traffic” would encourage them to cycle, with “better maintained routes” (15.1%) and “less or slower traffic” (11.4%) also commonly selected factors.
- “Access to cycle hire schemes or support to purchase a cycle” was less common as a factor among non-users (11.1%) than users (17.7%).

# What would encourage people to travel by cycle

Figure 2: Factors that would encourage users and non-users to cycle, Wales, 2025



Description of Figure 2: A horizontal bar chart showing the factors that would encourage users and non-users to cycle more often. The most common response for users was “more routes away from traffic” (50.3%), while the most common responses for non-users were “none of these” (31.9%) and being unable to cycle more often (23.6%).

Source: Transport for Wales – Wales National Travel Survey

Download data: [Factors to encourage modal shift to sustainable modes of travel](#)

Note 1: Respondents could select up to three options, so percentages may not sum to 100%.

Note 2: Based on the travel frequency described by respondents, 560 individuals were identified as cycle users and 2,430 were identified as non-users.

# Factors that would encourage bus use

## Bus users

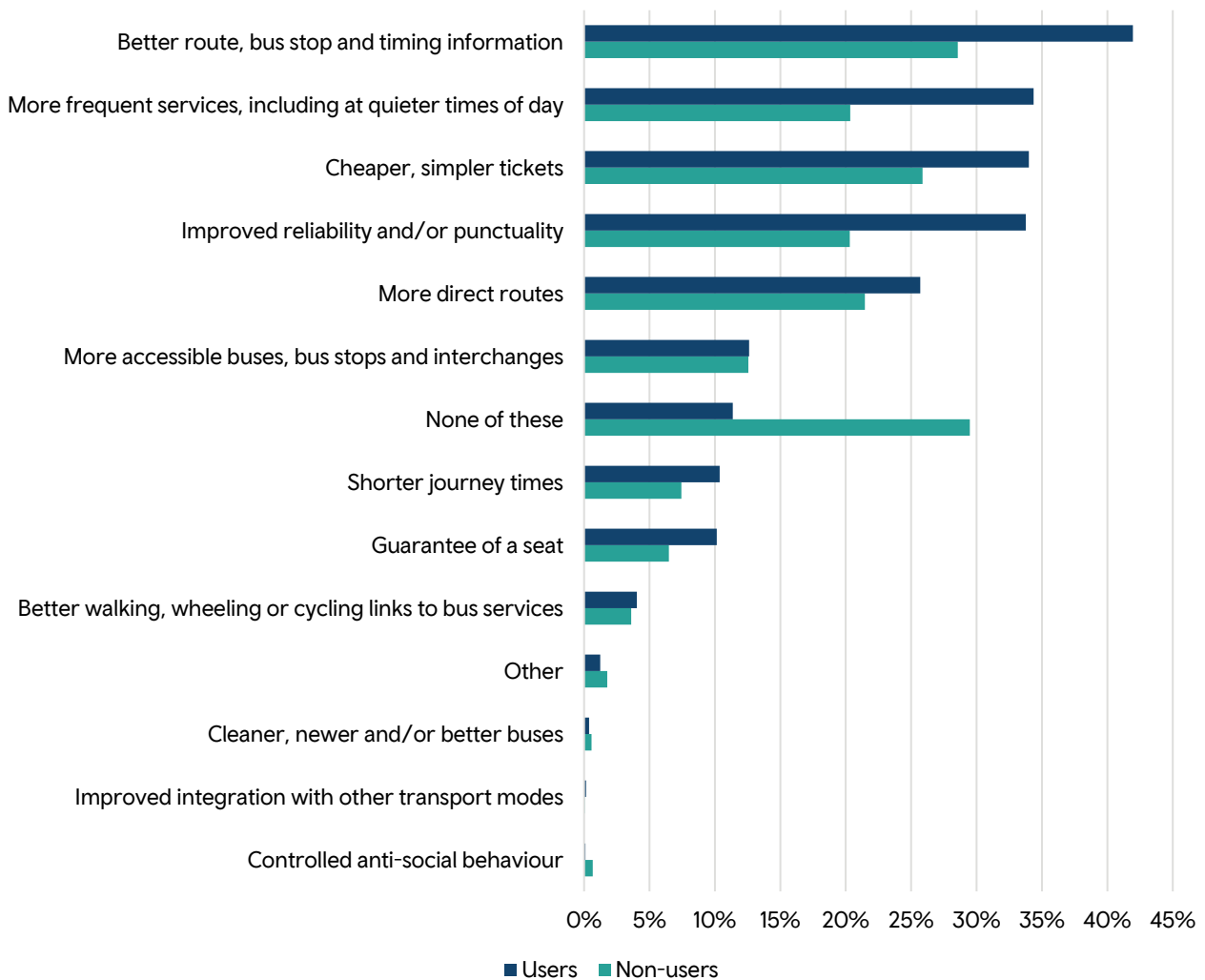
- “Better route, bus stop and timing information” (42.0%) was the most commonly selected factor that would encourage users to use the bus more often.
- “More frequent services, including at quieter times of day” (34.4%), “Cheaper, simpler tickets” (34.0%) and “Improved reliability and/or punctuality” (33.8%) were also commonly selected factors among users.
- Factors that would encourage multimodal journeys were not commonly selected by users, with “better walking, wheeling or cycling links to bus services” and “improved integration with other transport modes” selected by 4.0% and 0.1% of users respectively.
- “More frequent services, including at quieter times of day” was the most common factor for disabled bus users (42.2%).

## Bus non-users

- 29.5% of non-users selected that none of the factors listed would encourage them to travel by bus.
- Among other factors, non-users answered similarly to bus users. “Better route, bus stop and timing information” (28.6%) and “cheaper, simpler tickets” (25.9%) were the other top selected options.

# What would encourage people to travel by bus

Figure 3: Factors that would encourage users and non-users to travel by bus, Wales, 2025



Description of Figure 3: A horizontal bar chart showing the factors that would encourage users and non-users to travel by bus. The most common response for users was “better route, bus stop and timing information” (42.0%), while the most common responses for non-users were “none of these” (29.5%), followed by “better route, bus stop and timing information” (28.6%).

Source: Transport for Wales – Wales National Travel Survey

Download data: [Factors to encourage modal shift to sustainable modes of travel](#)

Note 1: Respondents could select up to three options, so percentages may not sum to 100%.

Note 2: Based on the travel frequency described by respondents, 1,525 individuals were identified as bus users and 1,430 were identified as non-users.

Note 3: Respondents were not asked to indicate what bus service or operator they used.

# Factors that would encourage rail use

## Rail users

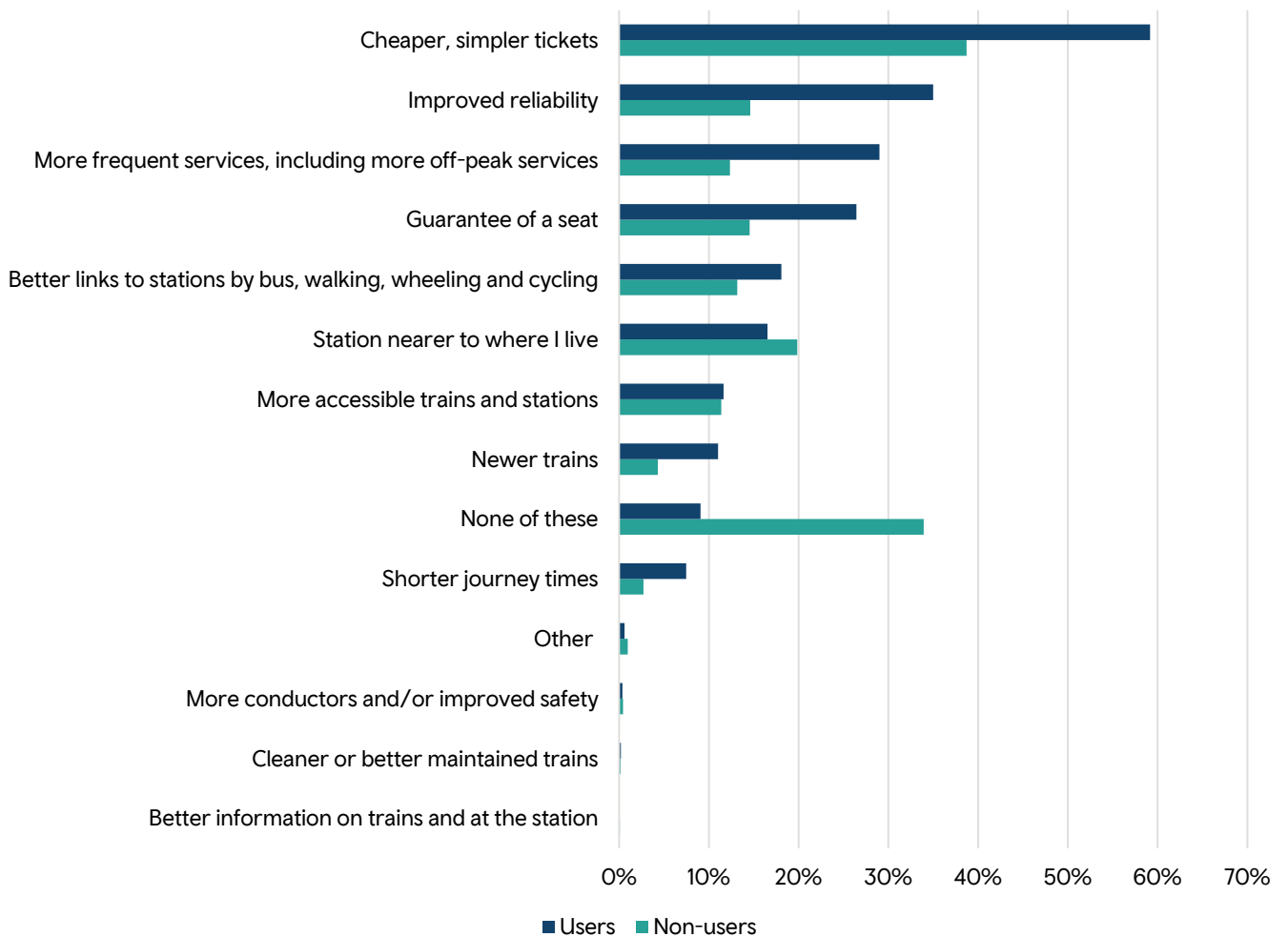
- “Cheaper, simpler tickets” was the factor that would encourage rail users to travel by rail more often, selected by 59.2% of users.
- 35.0% of users selected “improved reliability” as a factor that would encourage further use, with 29.0% of users selecting “more frequent services, including more off-peak services”.
- Unlike bus travel, developing “better links to stations by bus, walking, wheeling and cycling” was a factor that would encourage additional use for 18.1% of users.
- 20.0% of disabled rail users said that “more accessible trains and stations” would encourage them to travel by rail more often, compared to 10.0% of non-disabled rail users.

## Non-rail users

- “Cheaper, simpler tickets” (38.7%) was the most commonly selected factor that would encourage non-users to travel by rail, showing a common theme among users and non-users.
- As with other modes, a large share of non-users (33.9%) indicated that none of the factors listed would encourage them to travel by rail.
- “A station nearer to where I live” was selected by 19.8% of non-rail users.

# What would encourage people to travel by rail

Figure 4: Factors that would encourage users and non-users to travel by rail, Wales, 2025



Description of Figure 4: A horizontal bar chart showing the factors that would encourage users and non-users to travel by train. The most common response for users and non-users was “cheaper, simpler tickets” (59.2% and 38.7% respectively).

Source: Transport for Wales – Wales National Travel Survey

Download data: [Factors to encourage modal shift to sustainable modes of travel](#)

Note 1: Respondents could select up to three options, so percentages may not sum to 100%.

Note 2: Based on the travel frequency described by respondents, 1,930 individuals were identified as train users and 1,080 were identified as non-users.

Note 3: Respondents were not asked to indicate what train service or operator they used.

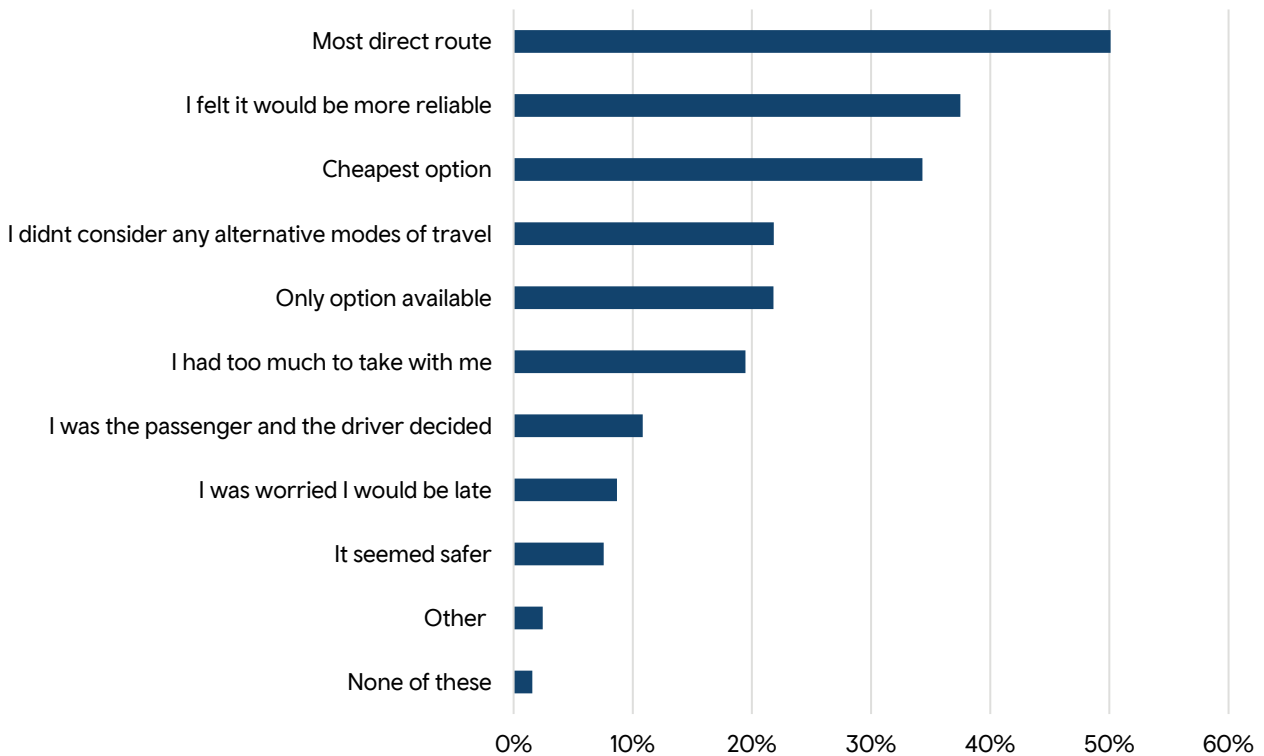
# Reasons why respondents travelled by car

Respondents who had travelled by car at least once every couple of months were asked why they chose to travel by car. Respondents were allowed to select up to three reasons, so percentages may not sum to 100%.

- 50.1% of respondents who travelled by car chose to do so because it was the most direct route.
- 37.5% chose to travel by car as they felt it would be the more reliable option, and 34.3% chose to travel by car as it was the cheapest option available.
- These three options were the most common reasons for male and female respondents, and for disabled and non-disabled respondents.

## Why people chose to travel by car

Figure 5: Reasons for choosing to travel by car, Wales, 2025



Description of Figure 5: A horizontal bar chart showing the factors that determined why a respondent travelled by car. The most common response was “most direct route” (50.1%)

Source: Transport for Wales – Wales National Travel Survey

Download data: [Reason to travel by car](#)

Note 1: Respondents could select up to three options, so percentages may not sum to 100%.

Note 2: Based on the travel frequency described by respondents, 2,855 respondents were asked this question.