AROLWG TEITHIO CENEDLAETHOL CYMRU

WALES NATIONAL TRAVEL SURVEY

Factors to encourage modal shift to sustainable travel modes: headline 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 from people across Wales. These data are 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.

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.

Main findings

- "Better maintained routes" (37.7%) was the most common factor that would encourage users to travel by walking and wheeling more often.
- 46.9% of cycle users responded that "more routes away from traffic" would encourage them to travel by cycle more often.
- 40.7% of bus users would be encouraged to travel by bus more often if there was "better route, bus stop and timing information".
- 60.2% of rail users identified "cheaper, simpler tickets" as a factor that would encourage more travel by rail.
- Among non-users, around 30% of respondents told us that none of the options listed would encourage them to travel by walking and wheeling, cycle, bus, rail and taxi.

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%.

Factors that would encourage walking and wheeling

Walkers and wheelers

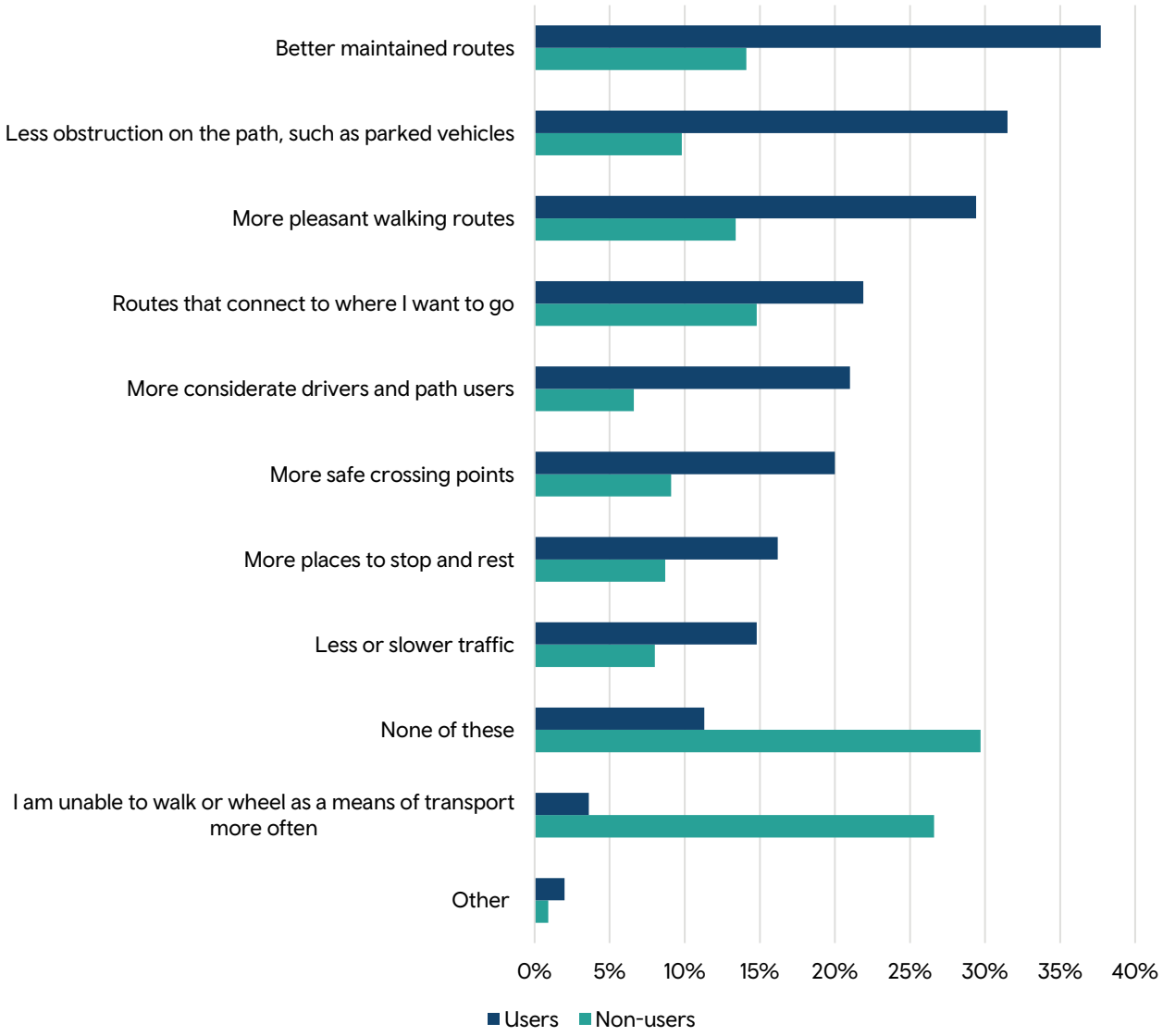
- The most popular factor that would encourage more people to walk and wheel was "better maintained routes" (37.7%), followed by "less obstructions on the path, such as parked vehicles" (31.5%) and "more pleasant walking routes" (29.4%).

Non walkers and wheelers

- 29.7% of respondents who were not walkers or wheelers indicated that none of the factors listed would encourage them to use the mode. This was the most commonly selected response .
- A further 26.6% 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 walkers and wheelers, was selected by only 14.1% of non-walkers or wheelers as a factor that would encourage them to walk or wheel.

What would encourage people to travel by walking and wheeling

Figure 1: Factors that would encourage walking and wheeling, Wales, 2025/26



Description of Figure 1:A horizontal bar chart showing the factors that would encourage people to walk or wheel more often. The most common response for walkers and wheelers was "better maintained routes" (37.7%), while the most common responses for people who did not walk or wheel were "none of these" (29.7%) and that they were unable to walk or wheel more often (26.6%).

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, 4,860 (81.4%) individuals were identified as walkers and wheelers. 1,225 (17.9%) were identified as non-walkers or wheelers.

Factors that would encourage cycling

Cyclists

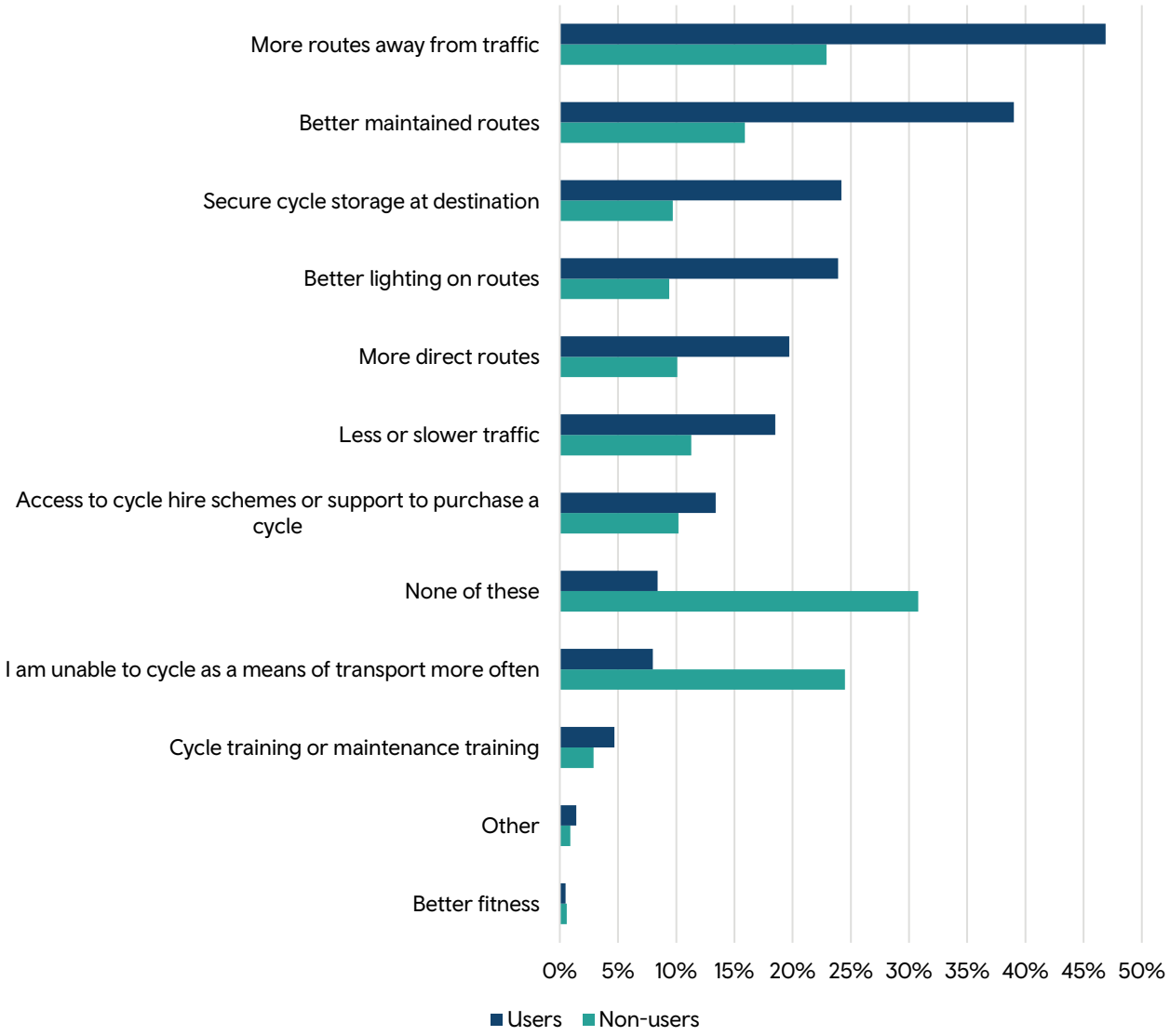
- Among cyclists, 46.9% of respondents said that "more routes away from traffic" would encourage further use. "Better maintained routes" was selected by 39.0% of cyclists, followed by "secure cycle storage at destination" (24.2%).

Non-cyclists

- 30.8% of non-users responded that "none of these" factors would encourage them to cycle. A further 24.5% indicated that they are "unable to cycle as a means of transport more often".
- 22.9% of non-users indicated that "more routes away from traffic" would encourage them to cycle, with "better maintained routes" (15.9%) and "less or slower traffic" (11.3%) also commonly selected factors.
- "Access to cycle hire schemes" or "support to purchase a cycle" were less common factors among non-users (10.2%) than users (13.4%).

What would encourage people to cycle

Figure 2: Factors that would encourage people to cycle, Wales, 2025/26



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" (46.9%), while the most common responses for non-users 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.

Factors that would encourage bus use

Bus users

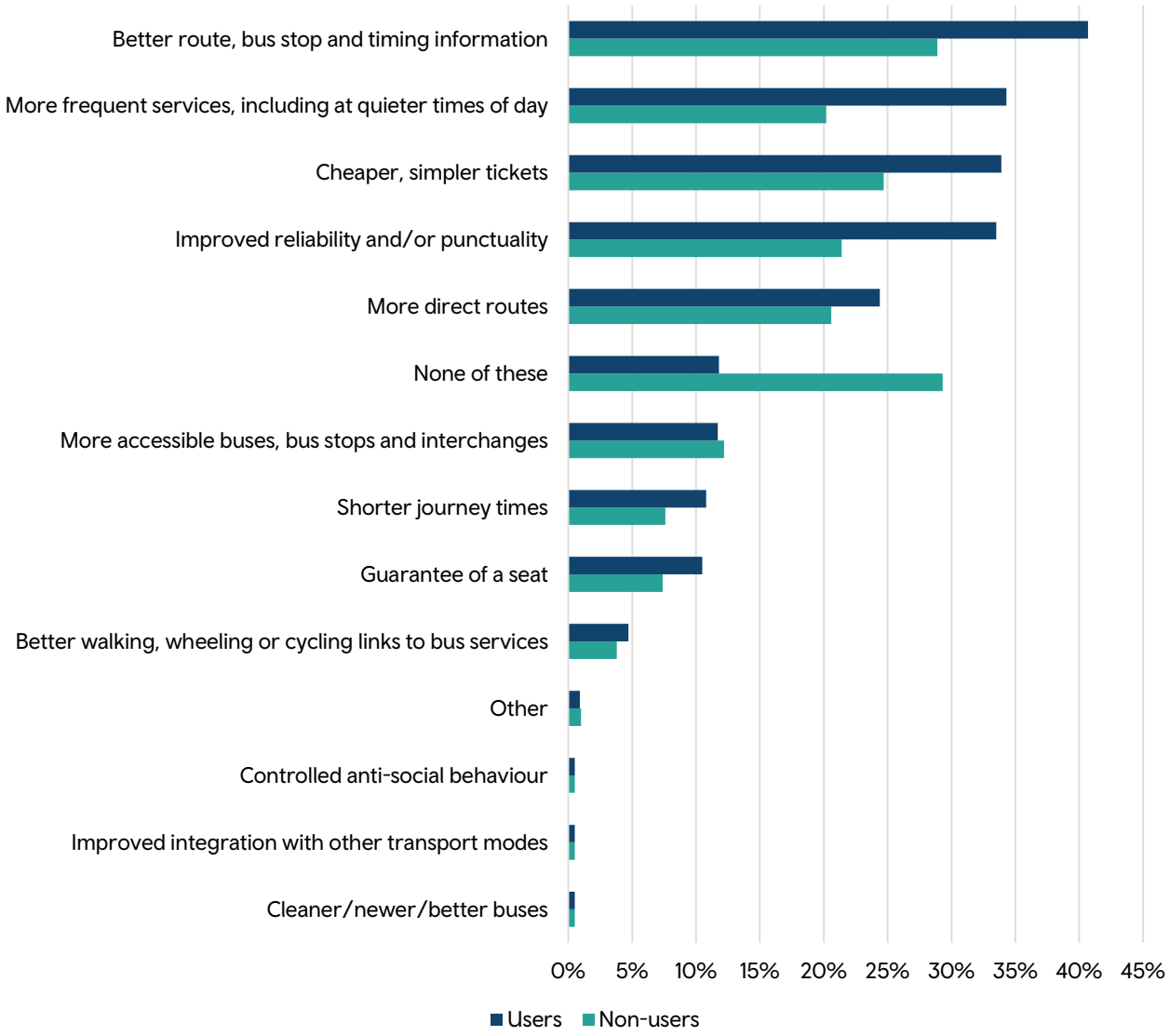
- "Better route, bus stop and timing information" (40.7%) was the most commonly selected factor that would encourage users to use the bus more often.
- "More frequent services, including at quieter times of day" (34.3%), "cheaper, simpler tickets" (33.9%) and "improved reliability and/or punctuality" (33.5%) 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 4.7% and less than 0.5% of users respectively.

Bus non-users

- 29.3% 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" (28.9%) and "cheaper, simpler tickets" (24.7%) were the other top selected options.
- Controlled anti-social behaviour was one of the least selected response options, at less than 0.5% of respondents for both users and non-users.

What would encourage people to travel by bus

Figure 3: Factors that would encourage people to travel by bus, Wales, 2025/26



Description of Figure 3: A horizontal bar chart showing the factors that would encourage people to travel by bus. The most common response for users was "better route, bus stop and timing information" (40.7%), while the most common responses for non-users were "none of these" (29.3%), followed by "better route, bus stop and timing information" (28.9%).

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, 3,080 (50.5%) individuals were identified as bus users and 2,770 (44.4%) were identified as non-users.

Note 2: Respondents were not asked to indicate what bus service or operator they used.

Factors that would encourage rail use

Rail users

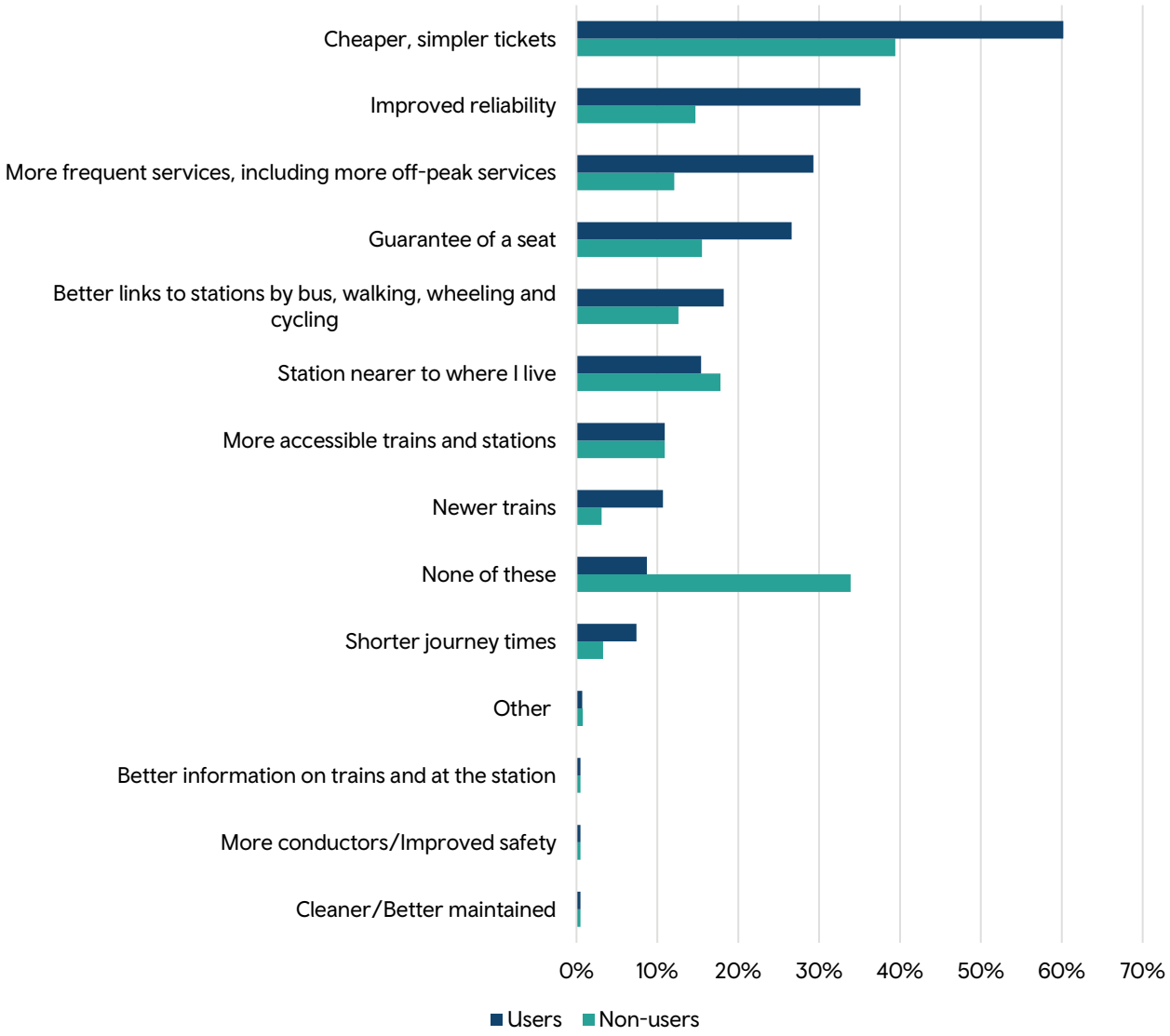
- "Cheaper, simpler tickets" was the factor that would encourage rail users to travel by rail more often, selected by 60.2% of users.
- 35.1% of users selected "improved reliability" as a factor that would encourage further use, with 29.3% of users selecting "more frequent services, including more off-peak services".
- Unlike bus travel, developing "better links to stations by bus, walking, wheeling and cycling" was a more popular factor that would encourage additional use for users (18.2%).

Non-rail users

- "Cheaper, simpler tickets" (39.4%) 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 17.8% of non-rail users.

What would encourage people to travel by rail

Figure 4: Factors that would encourage people to travel by rail, Wales, 2025/26



Description of Figure 4: A horizontal bar chart showing the factors that would encourage people to travel by train. The most common response for users and non-users was "cheaper, simpler tickets" (60.2% and 39.4% respectively).

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, 3,820 (65.6%) individuals were identified as rail users and 2,135 (31.1%) were identified as non-users.

Note 2: Respondents were not asked to indicate what rail service or train operator they used.

Factors that would encourage taxi use

Taxi users

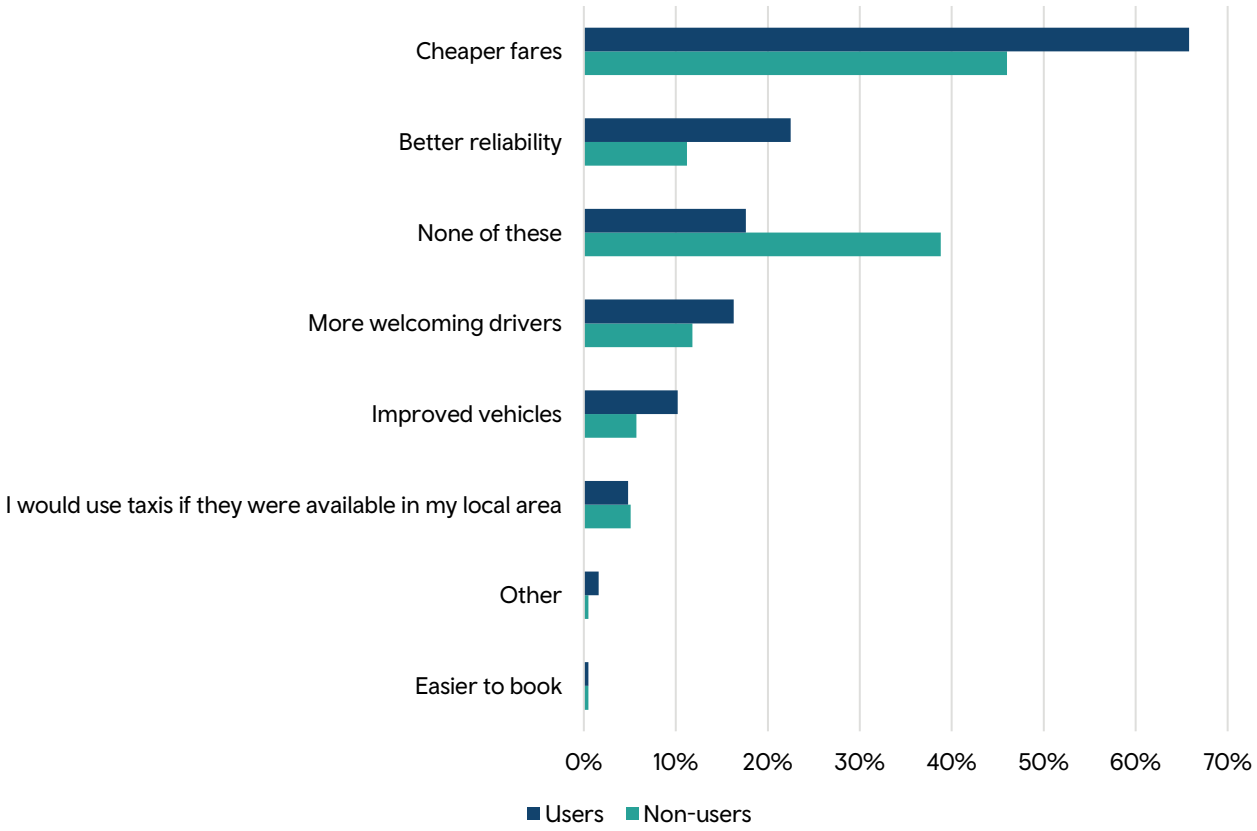
- "Cheaper fares" was the factor that would encourage taxi users to travel by taxi more often, selected by 65.8% of users.
- 22.5% of users selected "better reliability" as a factor that would encourage further use, with 17.6% of users selecting "none of these".

Non-taxi users

- "Cheaper fares" (46.0%) was the most commonly selected factor that would encourage non-users to travel by taxi, showing a common theme among users and non-users.
- As with other modes, a large share of non-users (38.8%) indicated that none of the factors listed would encourage them to travel by taxi.
- "More welcoming drivers" and "better reliability" was selected by 11.8% and 11.2% of non-taxi users respectively.

What would encourage people to travel by taxi

Figure 5: Factors that would encourage people to travel by taxi Wales, 2025/26



Description of Figure 5: A horizontal bar chart showing the factors that would encourage people to travel by taxi. The most common response for users and non-users was "cheaper fares" (65.8% and 46.0% respectively).

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, 3,065 (52.0%) individuals were identified as taxi users and 2,975 (46.4%) were identified as non-users.

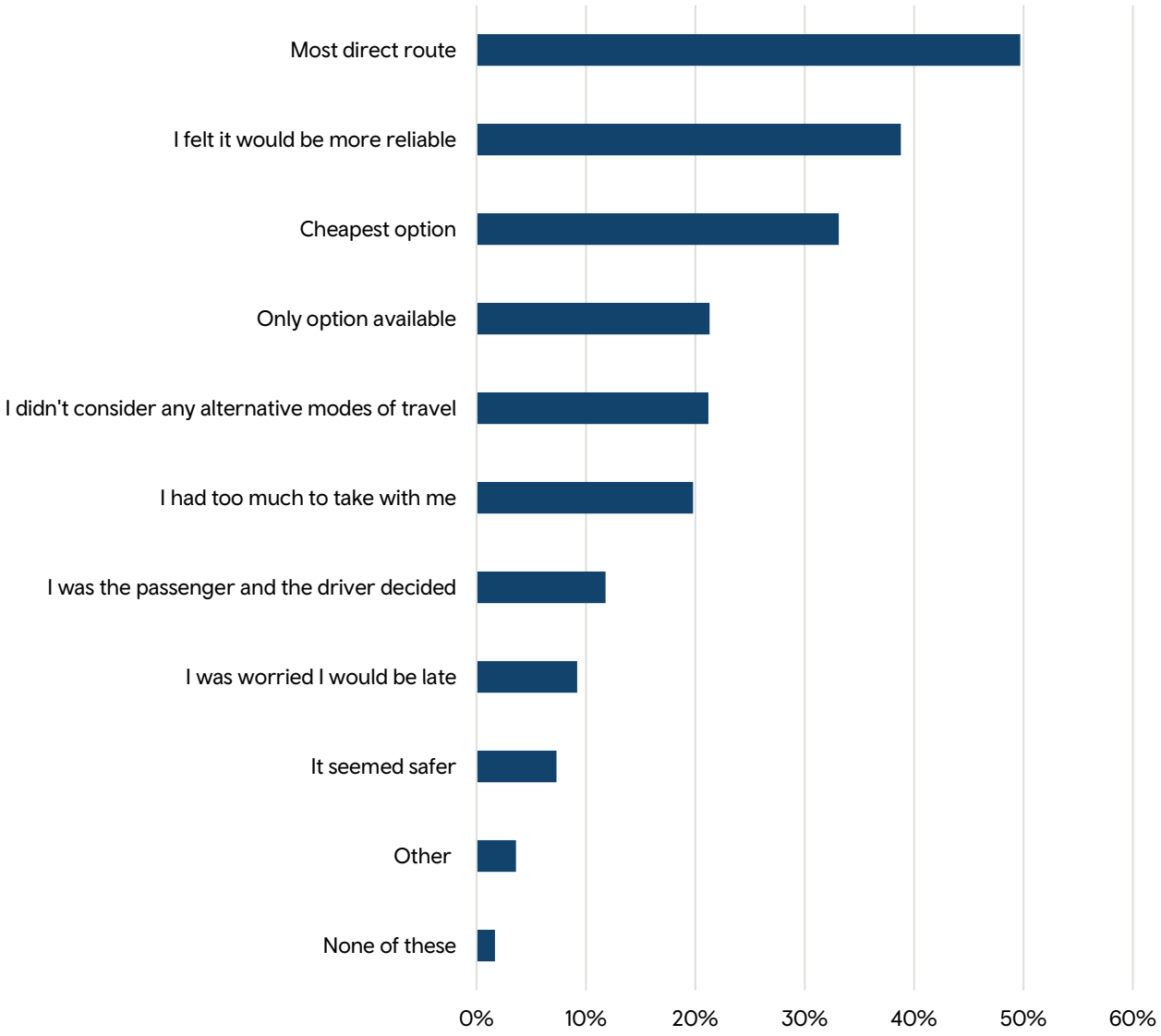
Reasons why respondents travelled by car

Respondents who had travelled by car at least once every couple of months were asked why they chose to travel by car. This was only asked of people who already use a car to understand why they choose to travel by car.

- 49.7% of respondents who travelled by car chose to do so because it was the most direct route.
- 38.8% chose to travel by car as they felt it would be the more reliable option and 33.1% chose to travel by car as it was the cheapest option available.

Why people chose to travel by car

Figure 6: Reasons for choosing to travel by car, Wales, 2025/26



Description of Figure 6: A horizontal bar chart showing why a respondent travelled by car. The most common response was “most direct route” (49.7%)

Source: Wales National Travel Survey, reasons to travel by car

Note 1: Based on the travel frequency described by respondents, 5,505 (89.9%) respondents were asked this question.