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WALES NATIONAL TRAVEL SURVEY

# Wales National Travel Survey: Bus 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 bus travel. It brings together information on how people travel by bus, and their attitudes and opinions on bus services. The WNTS does not differentiate by service provider, and as such figures for use or satisfaction may differ from operator-specific figures.

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 3.7% of journeys per person per year were made by bus.
- 85.3% of bus journeys were made by the 17.7% of respondents who travel by bus at least once per week.
- Walking and wheeling was the most common mode used to (93.1%) and from (91.3%) bus stops.
- 84.8% of bus users were either very or fairly satisfied with their overall bus journey.
- "Better route, bus stop and timing information" was the most popular factor that would encourage bus users to travel by bus more often (40.7%).
- The weighted cost per kilometre travelled by bus was £0.20.

# 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%.

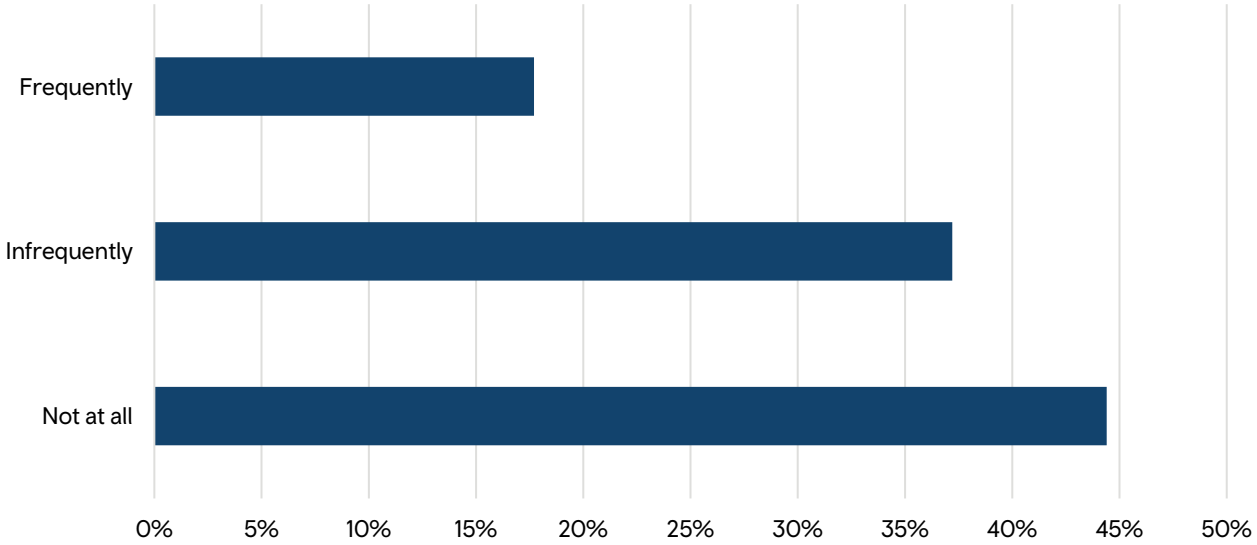
# Frequency of travel by bus

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

- 17.7% of respondents were frequent bus users, travelling by bus at least once per week (4.4% most days, 8.0% several times a week and 5.3% once a week).
- 37.2% of respondents travelled by bus infrequently. 10.4% of respondents reported using a bus once or twice a month, 10.4% once every couple of months, and 16.4% once or twice during the year.
- 44.4% of respondents reported not using a bus at all.

## Bus: travel frequency

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




Description of Figure 1: A horizontal bar chart showing the percentage of respondents who reported using a bus frequently, infrequently and not at all. 17.7% of respondents used a bus frequently and 37.2% used a bus infrequently.

Source: Wales National Travel Survey, travel frequency

## Disabled status

- More disabled respondents (20.3%) reported using the bus at least once per week compared to non-disabled respondents (16.0%).

## Regions

- South East Wales had the highest share of respondents who used the bus at least once per week (19.4%), followed by South West Wales (17.3%) and North Wales (16.5%). Mid Wales was much lower at 9.7%.
- The share of infrequent users was relatively similar across the regions. However, North Wales had the highest share of respondents reporting not using the bus at all in the last twelve months (54.2%), whereas South East Wales had the lowest share (42.5%).

## Age group

- 37.0% of respondents aged 16-24 used a bus at least once per week. This is much higher than all other age groups, with the next highest at 23.5% for those aged 75-84. Respondents in other age groups travelled by bus less frequently.
- 9.7% of respondents aged 45-54 used the bus at least once per week. This was the lowest share among all age groups.

## Wales Index of Multiple Deprivation quintiles

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.

- In general, the proportion of respondents who reported using a bus at least once a week decreased as deprivation decreased from 25.0% in WIMD Q1 (most deprived) to 13.2% in WIMD Q4.

# Main mode share

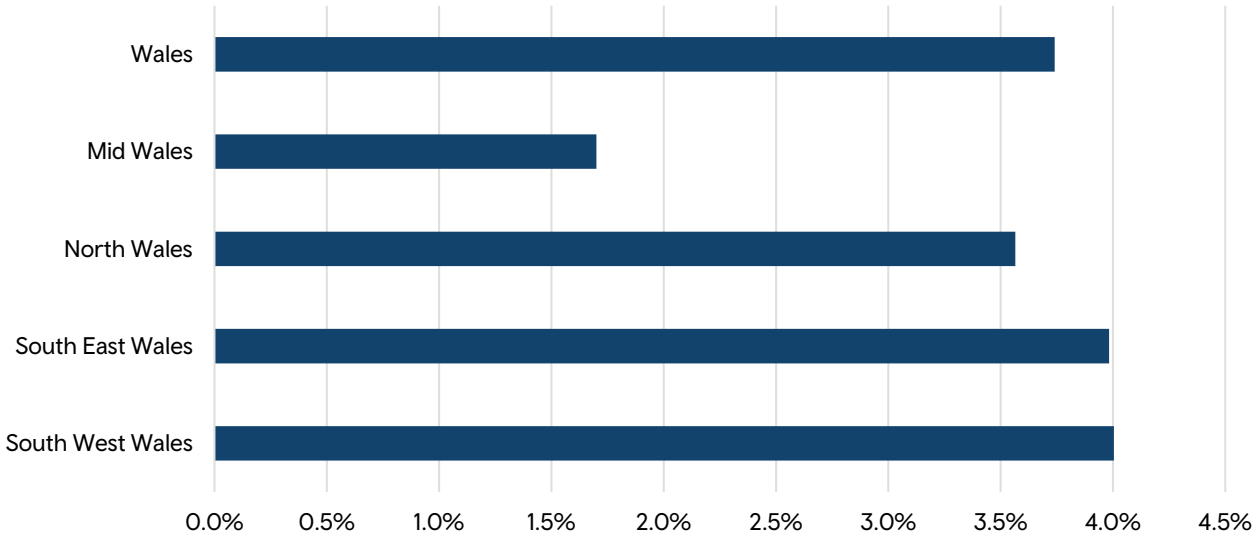
The main mode of travel refers to the mode that was used for the longest distance in a journey. Main mode share is the percentage of journeys per person per year completed by a given main mode.

In 2025/26, we estimate that respondents made 23.3 journeys per person per year by bus.

- Overall, 3.7% of journeys per person per year were made by bus as the main mode of travel. This accounted for 66.0% of all public transport journeys (35.3 journeys per person per year) in 2025/26.
- 4.2% of journeys by residents in urban areas were made by bus, compared to 2.7% of journeys by those in rural areas.

## Bus: Main mode share by region

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



Description of Figure 2: A horizontal bar chart showing the share of journeys per person per year by bus. 4.0% of journeys are made by bus in South West Wales and South East Wales, above the national average (3.7%).

Source: Wales National Travel Survey, main mode share

## Main mode share by travel frequency

- The majority of bus journeys were made by a relatively small number of respondents. 17.7% of respondents have been identified as frequent users. These respondents accounted for 85.3% of all bus journeys recorded and made 19.9% of their journeys by bus.
- 37.2% of respondents were identified as infrequent bus users. These respondents made 1.1% of their journeys by bus (7.1 journeys per person per year) and accounted for 11.4% of all bus journeys.
- A further 44.4% of respondents indicated that they did not travel by bus at all and correspondingly made less than two journeys per person per year by bus.
- While a greater share of journeys were completed by bus (3.7%) than rail (1.9%), we estimate that throughout the year more people made at least one journey by rail (68.3%) than compared to bus (54.9%).

## Main mode share by Wales Index of Multiple Deprivation

- The share of journeys by bus was greater among the most deprived areas of Wales. Residents of Q1 made 5.5% of their journeys by bus, and those in Q2 made 5.0% of their journeys by bus.
- Respondents living in the least deprived 20% of Wales (Q5) made 3.0% of their journeys (21.3 journeys per person per year) by bus.

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.

- We estimate that the share of journeys by bus decreased as relative income deprivation falls. Respondents living in Q1 of the income deprivation quintiles made 5.6% of their journeys by bus. This decreased as relative income deprivation reduced, as those in the least income deprived 20% of Wales (Q5) made 3.1% of journeys by bus.

- The share of bus use by access to service deprivation was a mixed picture. Those living in the most deprived 20% of Wales by access to services made the lowest share of journeys by bus (2.7%). However, those living in the second most deprived quintile (Q2) made the largest share, with 4.3% of their journeys by bus.

### Main mode share by the sex of the respondent

- Female respondents made 64.9% of all bus journeys recorded. We estimate that female respondents made 4.8% of their journeys by bus, compared to 2.5% of journeys by male respondents.

### Main mode share by age group

- The younger and older age groups made the greatest share of their journeys by bus. We estimate that 8.7% of journeys by those aged 16-24 were made by bus in 2025/26, the highest by any age category. Those aged 75 and older made 6.7% of journeys by bus, followed by 4.6% of those aged 65-74.
- Respondents aged 25-44 and 45-64 made a relatively lower share of their journeys by bus (2.0% and 2.4% respectively).

### Main mode share by disabled status

- We estimate that 5.2% of journeys by disabled respondents were made by bus, compared to 3.1% of journeys by non-disabled respondents.

### Main mode share by respondents with a driving licence

- The largest difference in bus mode share was between those with and without a full driving licence. Respondents without a licence were estimated to have made 14.0% of journeys by bus compared to 1.7% of journeys by those with a licence.
- For comparison, the main mode share by rail was 4.6% of journeys among those who do not hold a full driving licence compared to 1.4% of journeys from those who do.

## 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).

- Among multimodal journeys, 34.6% used a bus as the main mode of travel. Another 10.9% of multimodal journeys used a bus as an additional mode of travel.

- A total of 4.9% of all journeys involved bus, either as the main (3.7%) or as an additional (1.1%) mode of travel. This corresponds to 30.4 journeys per person per year that used a bus at some point.
- Journeys including buses were the second most common type of multimodal journey, behind those that included using a car.

## Journeys to and from bus stops

- 93.1% of journeys to and 91.3% from bus stops were made by walking and wheeling.
- 1.2% of journeys to and 1.4% from bus stops were made by car.
- Journeys to and from bus stops were typically short. 58.2% of journeys to bus stops were under 1km long and 38.5% were between 1km and 5km.
- Similarly, 61.2% of journeys from bus stops to the destination were under 1km long and 35.8% of journeys were between 1km and 5km.

## Journey distance

The journey distance by bus 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.

- Overall, we estimate the total distance travelled by bus was 247.4km per person per year. This accounted for 2.6% of the total distance travelled per person per year (9,670.6km).
- The mean distance for a bus journey was 10.6km and the median was 8.8km.
- 41.7% of bus journeys were between 10km and 20km. 23.3% were between 5km and 10km and 29.2% were between 1km and 5km.
- Frequent bus users travelled 1,104.0km per person per year by bus (16.6% of their total distance travelled). These users accounted for 78.9% of the total bus distance travelled.
- The weighted cost per kilometre travelled by bus is £0.20. This excluded those who travelled for free. For more information on cost per kilometre, see our definitions document.

## 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. Journeys purely for

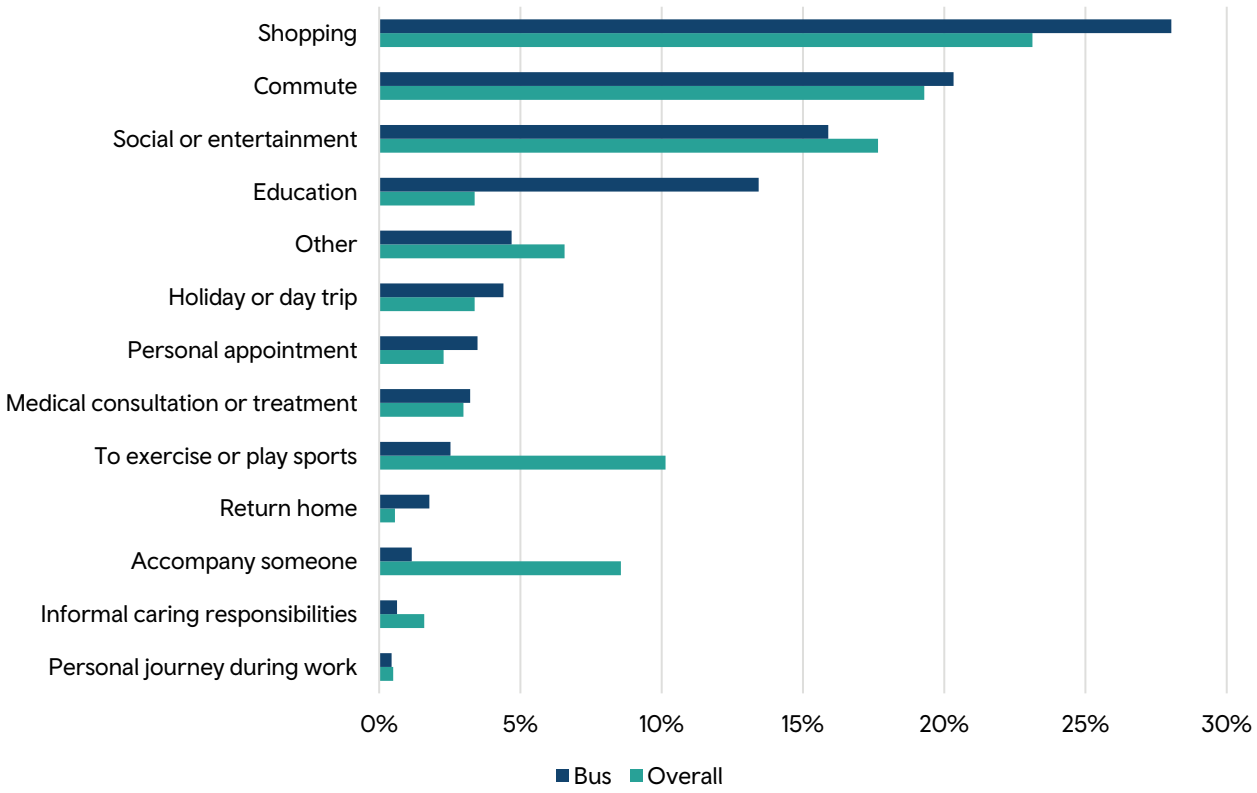
leisure, where the act of travelling is the leisure activity (for instance, going for a run or playing sport) are excluded. This is aligned with the Active Travel Act Guidance definition of utility journeys.

Information about what journeys were included can be found in our definitions.

- The most common journey purpose reported when travelling by bus was shopping (28.0%). This is higher than the overall share of journeys for shopping (23.1%). However, shopping is the most common purpose across all modes.
- Commutes (20.3%) and journeys to social or entertainment (15.9%) were also popular journey purposes when travelling by bus, aligned with the overall journey purpose shares (commutes: 19.3%, social or entertainment: 17.7%).
- 13.4% of journeys by bus were to education, compared to only 3.4% of all journeys.

## Bus: Share of journeys by journey purpose

Figure 3: Share of journeys per person per year by journey purpose by bus and overall, Wales, 2025/26




Description of Figure 3: A horizontal bar chart showing the share of journeys by journey purpose, comparing bus to overall journeys. The purpose of journeys by bus typically follows a similar pattern to overall journeys. Journeys to education are a prominent exception, which are far more common by bus than overall.

Source: Wales National Travel Survey, journey purpose

# Experience when travelling by bus

We asked bus users additional questions about their experience on their most recent bus journey. We have defined a bus user as any respondent who reported having travelled by bus at least once every couple of months. This corresponded to 38.5% of respondents.

## Overall journey satisfaction

- A large share of respondents were satisfied with their overall journey when travelling by bus. 84.8% of respondents reported feeling very or fairly satisfied with their overall journey (36.3% very satisfied and 48.4% fairly satisfied). 8.0% of respondents reported feeling fairly dissatisfied and 3.7% very dissatisfied.
- North Wales had the highest proportion of satisfied respondents at 88.1% and South West Wales was the lowest at 81.5%.
- In general satisfaction increased with age, with 78.5% of those aged 16-24 satisfied compared to 90.2% of those aged 75-84.

## Satisfaction with safety

- 90.0% of respondents reported feeling very or fairly satisfied with their safety when travelling by bus (46.7% very satisfied and 43.3% fairly satisfied). 4.8% of respondents reported feeling fairly dissatisfied and 1.7% very dissatisfied.
- There was a 12.5 percentage point difference between age groups and satisfaction with safety with 95.0% of those aged 65-74 and 82.5% of those aged 35-44 satisfied.

## Satisfaction with features of bus journeys

Bus users were randomly assigned to either answer questions on satisfaction on availability of information and ticketing or punctuality and reliability.

### Satisfaction with the availability of information

- 75.2% of respondents were satisfied with the availability of information (29.6% very satisfied, 45.6% fairly satisfied). 12.2% of respondents reported feeling fairly dissatisfied, and 6.1% very dissatisfied.
- More non-disabled respondents were satisfied with the availability of information (78.3%) than disabled respondents (71.2%), a 7.1 percentage point difference.

### Satisfaction with ticketing

- 73.1% of respondents were satisfied with ticketing (36.3% very satisfied and 36.9% fairly satisfied). 9.8% of respondents were dissatisfied with ticketing (5.6% fairly dissatisfied and 4.1% very dissatisfied).
- More non-disabled respondents were satisfied with ticketing compared to disabled respondents. There was a 13.6 percentage point difference between the satisfaction of non-disabled (76.7%) and disabled (63.1%) respondents for ticketing.

### Satisfaction with punctuality

- 73.3% of respondents reported feeling satisfied with punctuality (30.5% very satisfied, 42.7% fairly satisfied). 13.8% of respondents reported feeling fairly dissatisfied and 8.7% very dissatisfied.
- More female respondents were satisfied with punctuality compared to male respondents. There was a 7.3 percentage point difference between the satisfaction of female (76.7%) and male (69.4%) respondents.

### Satisfaction with reliability

- Reliability had the lowest reported satisfaction across all factors for bus. 71.8% of respondents were satisfied with reliability (29.4% very satisfied and 42.4% fairly satisfied).
- 24.7% of respondents were dissatisfied with reliability (15.8% fairly dissatisfied and 8.9% very dissatisfied).
- 75.5% of female respondents were satisfied with bus reliability, compared to 67.3% of male respondents, an 8.2 percentage point difference.

## Feeling of welcomeness

- 91.2% of respondents reported feeling welcome on their most recent bus journey (48.4% very and 42.8% fairly welcome). 5.1% of respondents reported feeling unwelcome (1.0% very and 4.0% fairly unwelcome).
- Respondents within age groups 65-74 and older reported feeling more welcome than those in younger age groups. 94.3% felt welcome in age groups 65-74 and 85 or above.
- 88.3% of respondents aged 16-24, and 88.0% of those aged 35-44 reported feeling welcome.

## Why respondents felt unwelcome

5.1% of users reported feeling unwelcome on their most recent bus journey. We asked these users about why they felt unwelcome.

- Over half (53.6%) of respondents reported they felt unwelcome because of "other passengers". This was followed by 43.4% of respondents feeling unwelcome due to the "bus driver and other members of staff", and 41.7% due to "your surroundings (both on the bus and while waiting)".

## Welsh language use when travelling by bus

We asked bus users who could communicate in Welsh what language they used when travelling by bus. More information on how we have defined Welsh language users can be found in our definitions document. Respondents could select more than one option when answering this question.

- Most respondents used English (92.3%) during their bus journey followed by Welsh (25.7%).

- The 73.4% who had then said they had not used Welsh were asked a follow-up question about whether they wanted to communicate in Welsh. 84.8% did not want to communicate in Welsh while 8.9% did but were unable to.

# Satisfaction with travelling independently

All respondents were asked how satisfied they were with their own ability to travel independently without the assistance of staff or any passengers they didn't start their journey with.

- About three quarters of respondents (78.8%) felt very or fairly satisfied.
- Almost twice as many respondents selected that they do not travel by bus (9.7%), compared to those who felt very or fairly dissatisfied (5.2%). 0.5% of respondents reported that bus services were not available in their area.
- A higher proportion of non-disabled respondents (87.8%) reported they were satisfied with their ability to travel independently compared to disabled respondents (60.7%).

# Discounted travel card and ticket information

- 32.9% of all respondents held a discounted or concessionary travel card or pass, and 65.6% did not hold a pass.

# Affordability of bus travel

Questions on the affordability of bus tickets is split between those with and without a concessionary card or other discounted travel pass (hereafter discounted travel).

## Respondents without discounted travel

Respondents without discounted travel (65.6%) were asked if they felt they could travel for a variety of purposes.

- 47.3% of respondents reported they could afford to travel for all purposes. 23.4% reported they could afford to travel for some purposes, such as essential health appointments and/or shopping, work or education, or for visiting friends or family or for social and leisure purposes.
- 7.2% reported that they could not afford to travel at all.

## Respondents with discounted travel

Respondents with discounted travel (32.9%) were asked if they felt they could travel for the same set of purposes.

- 72.0% of respondents reported that their travel card allows them to travel for free.
- 12.0% of respondents reported they could afford to travel for all purposes and 7.2% that they could afford to travel for any combination of essential health appointments and/or shopping, work or education or visiting friends or family or social and leisure purposes.
- 0.8% reported they could not afford to travel at all, despite their discounted travel.

Respondents who could afford to travel while using their discounted travel card or pass were asked, if they did not have discounted travel, would they be able to afford to travel for the same purposes.

- 39.8% of respondents reported they felt they could afford to travel for all purposes without discounted travel. 29.2% of respondents reported they felt they could afford to travel for any combination of essential health appointments and/or shopping, work or education or visiting friends or family or social and leisure purposes.
- 15.2% reported they felt they would not be able to afford to travel at all.

## Why respondents stopped travelling by bus

The respondents who reported using the bus once or twice during the year and not at all (60.7% of total respondents) were asked if they travelled by bus regularly at any time in the last five years.

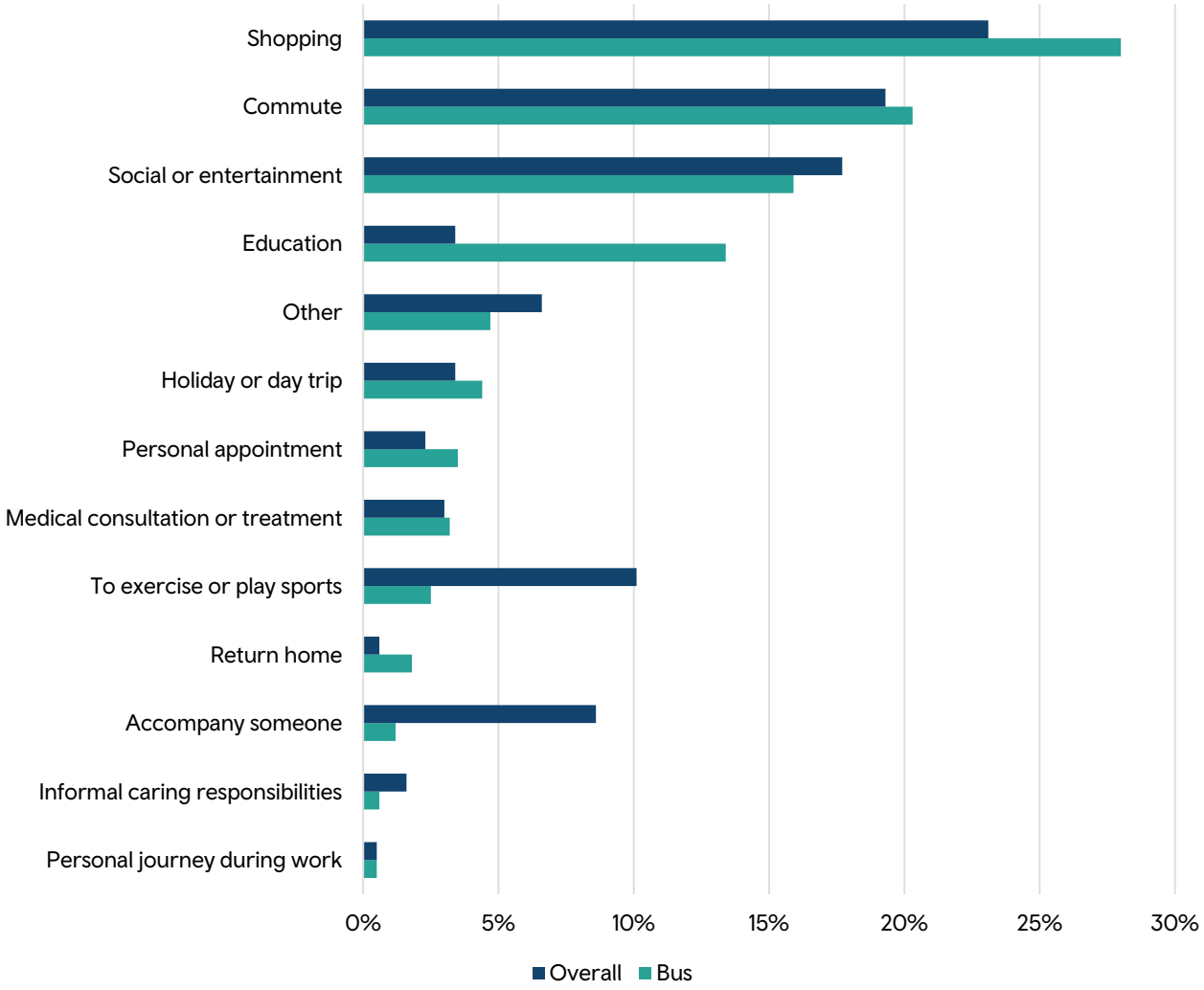
- 18.6% reported they had travelled by bus regularly in the past five years.
- Those 18.6% were then asked why they stopped using the bus. 57.4% selected "I use an alternative mode of transport now."

## Factors that would encourage users to travel by bus more often

- 50.5% of respondents were identified as bus users.
- The most popular factor that would encourage current bus users to use a bus more often was "better route, bus stop and timing information" (40.7%), "more frequent services, including at quieter times of day" (34.3%) and "cheaper, simpler tickets" (33.9%).

## What would encourage people to travel by bus

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




Description of Figure 4: 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.

## Sex of the respondent

- There was not much difference between the factors and proportions selected between male and female respondents with the same options as above.

## Disabled status

There were slight differences in responses selected by disabled and non-disabled respondents.

- 41.8% of non-disabled respondents selected "better route, bus stop and timing information", 35.2% selected "cheaper, simpler tickets" and 34.5% selected "more frequent services, including at quieter times of day".
- The three most common factors for disabled respondents were "more frequent services" (selected by 38.2%), "better route, bus stop and timing information" (selected by 36.5%) and "improved reliability and/or punctuality" (selected by 31.2%).

## Regions

- In general, the most commonly selected responses remained broadly similar, despite differences in the proportion of respondents who selected these options.

## Age group

- "Cheaper tickets" was the most common factor for age groups 16-24, 25-34 and 35-44 that would encourage further bus use (60.6%, 50.1% and 48.3% respectively).
- For respondents aged 65-74 and 75-84, "better route, bus stop and timing information", "more frequent services at quieter times of day" and "improved reliability and/or punctuality" were the most selected factors that would encourage further bus use.
- The responses selected by respondents aged 85 or above differed from other respondents, with 35.4% of respondents selecting "none of these". This was followed by "more frequent services at quieter times of day" (32.6%) and "improved reliability and/or punctuality" (29.2%).

## WIMD Quintile

- "Better route, bus stop and timing information" was the most selected factor in overall WIMD Q2 to Q5, and the second most common in Q1. Shares ranged from 37.3% in Q1 to 44.9% in Q5.
- Another common factor selected across WIMD Quintiles 1, 2, 3 and 5 was "improved reliability and or punctuality". This ranged from 33.4% in Q2 to 37.5% in Q5.
- "Cheaper, simpler tickets" was selected by more respondents in deprived areas (41.6% of respondents in Q1, 35.2% in Q2 and 27.1% in Q4). "More frequent services at quieter times of day" was selected more often by those in less deprived areas (36.2% in Q3, 35.9% in Q4 and 38.0% in Q5).

# Factors that would encourage non-users to travel by bus more often

- 44.4% of respondents were identified as non-users of buses.
- 29.3% of non-users indicated that "none of these" options listed would encourage them to travel by bus. "Better route, bus stop and timing information" was selected by 28.9% of respondents and "cheaper, simpler tickets" by 24.7%.

## Sex of the respondent

- More male respondents (31.6%) selected "none of these" compared to female respondents (27.6%).

## Disabled status

- There were slight differences in responses selected by disabled and non-disabled respondents. For non-disabled respondents, 30.4% selected "better route, bus stop and timing information", 27.5% selected "none of these" and 27.2% selected "cheaper, simpler tickets".
- The three most common factors for disabled respondents were "none of these" (33.8%), "better route, bus stop and timing information" (24.1%) and "more frequent services, including at quieter times of day" (19.5%).

## Regions

- Across the regions, while proportions differed, the most commonly selected responses remained broadly similar.

## Age group

- "None of these" was selected most frequently by respondents in older age groups, with only 26.2% for those aged 25-34 but 59.0% for those aged 85 or above.
- "Better route, bus stop and timing information" was a frequently selected factor for all age groups, ranging from being selected by 31.2% for those aged 55-64 to 12.4% for those aged 85 or above.
- All age groups from 16-24 to 45-54 reported "cheaper, simpler tickets" more frequently ranging from 30.6% for those aged 16-24 to 35.9 for those aged 25-34.

## WIMD Quintiles

- "None of these" was selected by respondents in all WIMD Quintiles ranging from 25.5% in Quintile 4 to 32.9% in Quintile 2. For "better route, bus stop and timing information", this ranged from selected by 25.0% of respondents in Quintile 1 to 31.5% in Quintile 3.
- Compared to the less deprived quintiles, respondents in more deprived areas reported "cheaper simpler tickets" would encourage them to use a bus – 27.6% in Quintile 1 to 25.4% in Quintile 3.