AROLWG TEITHIO CENEDLAETHOL CYMRU

WALES NATIONAL TRAVEL SURVEY

Wales National Travel Survey: Other modes 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 community transport, ferry or boat, and plane. It brings together information on their attitudes and opinions people have on these other modes of travel. 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

- Over half of respondents (57.2%) reported they did not know if there were community transport services in their area.
- 63.4% of respondents travelled to a port using a car, either as a passenger or the driver.
- 70.2% of respondents travelled to an airport using a car, either as a passenger or the driver, followed by taxi (12.2%) and train (9.5%).
- 69.0% of respondents were satisfied with their most recent community transport journey.

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%.

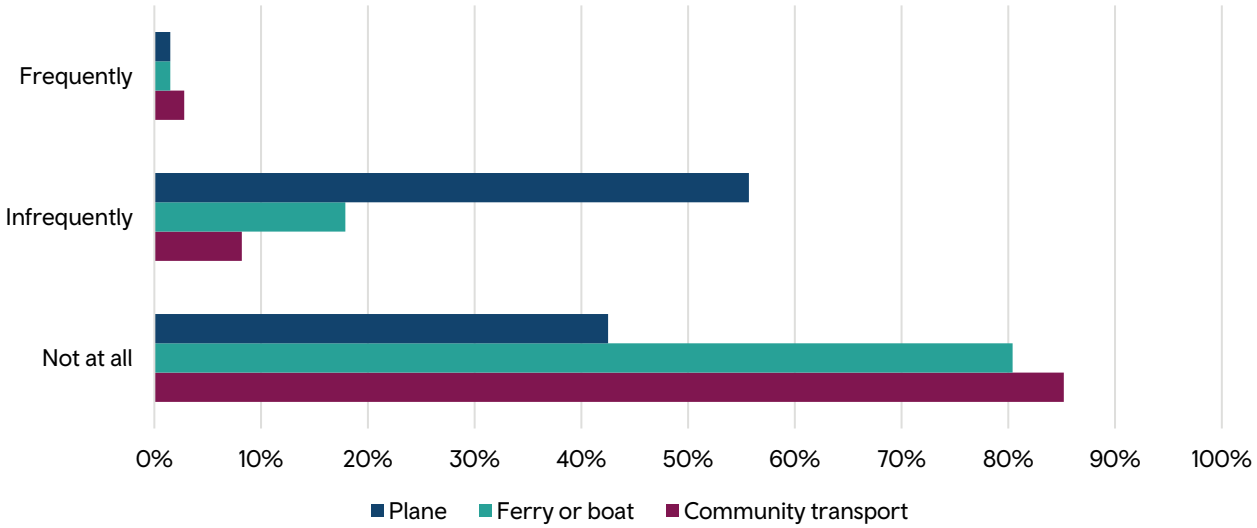
Frequency of travel by other modes

The travel frequency questions measured how often a person travelled by various modes within the last 12 months. This differs from mode share, which is the share of journeys per person per year made by a given mode.

- 2.8% of respondents were frequent community transport users, travelling by the mode at least once a week (0.8% most days, 1.2% several times a week and 0.8% once a week).
- 8.2% of respondents travelled by community transport infrequently. 1.8% of respondents used community transport once or twice a month, 2.2% once every couple of months and 4.2% once or twice during the year.
- 85.2% of respondents reported not using community transport at all in the last twelve months.
- 1.2% of respondents travelled by boat or ferry once every couple of months, and 16.7% once or twice during the year.
- 80.4% of respondents reported not using a boat or ferry at all in the last twelve months.
- 7.5% of respondents reported travelling by plane once every couple of months and 47.5% once or twice during the year.
- 42.5% of respondents reported not using a plane at all in the last twelve months.

Other modes: travel frequency

Figure 1: How frequently respondents used community transport, ferry or boat and plane in the last 12 months, Wales, 2025/26



Description of Figure 1: A horizontal bar chart showing the percentage of respondents who reported using community transport, ferry or boat and plane frequently, infrequently and not at all. For all three modes, the proportion of respondents increases as travel becomes more infrequent. 42.5% of respondents for plane and 85.2% and 80.4% of respondents for community transport and ferry or boat do not use the mode to travel at all.

Source: Wales National Travel Survey, travel frequency

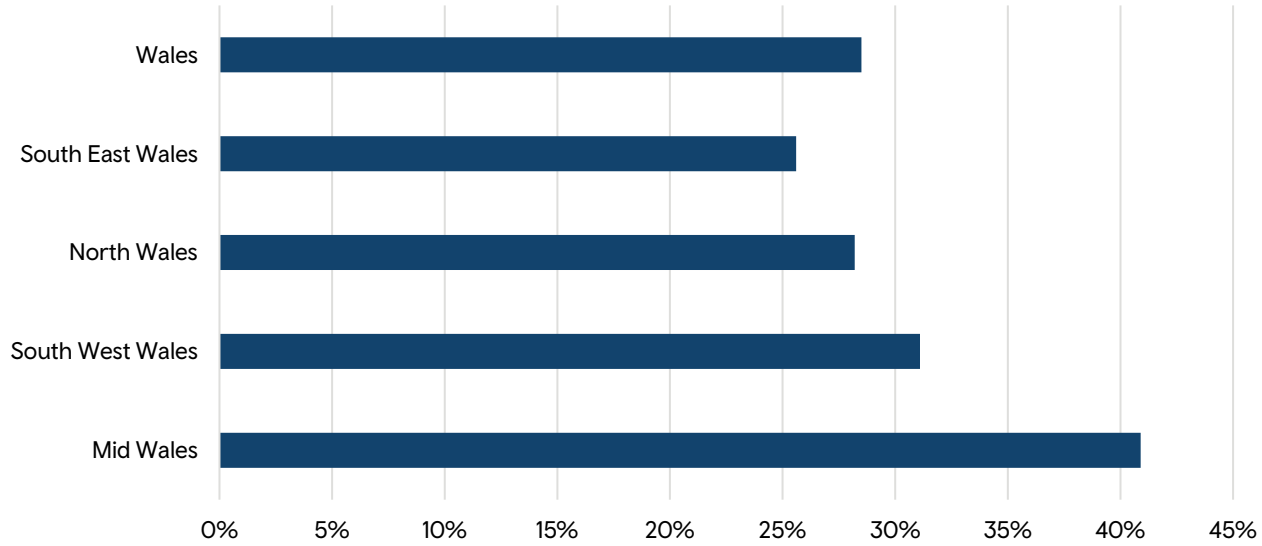
Availability of community transport

The respondents who reported not using community transport in the last twelve months (82.5%) were asked if community transport services were available in their local area.

- Over half of respondents (57.2%) reported they did not know if there were services in their area.
- 28.5% of respondents reported services were available and 14.0% said there were not services available.
- A higher proportion of respondents in Mid Wales reported community transport services in their area at 40.9%. This was followed by South West Wales (31.1%), North Wales (28.2%) and South East Wales (25.6%).

Community transport availability

Figure 2: Percentage of respondents reporting community transport services were available in their area in Wales and regionally, Wales, 2025/26



Description of Figure 2: A horizontal bar chart showing the proportion of respondents who reported services were available in their area. The Wales-level average showed 28.5% of respondents reported community transport services were available. 40.9% of respondents in Mid Wales and 31.1% in South West Wales reported availability but South East and North Wales had less than the Wales average at 25.6% and 28.2% of respondents reporting availability.

Source: Wales National Travel Survey, availability and use of travel services

Port used in the most recent boat or ferry journey

The respondents who used a boat or ferry at least once a year (18.4%) were asked which UK port they used on their most recent journey and how they travelled to this port. The list of ports included in this survey can be found in our definitions document.

- Dover was the most commonly selected port (20.2%) among those listed. This was followed by Holyhead (13.6%) and Fishguard (7.3%). However, 28.4% selected other, and 24.1% selected that they did not travel from any of the ports listed.
- 63.4% of respondents travelled to a port using a car, either as a passenger or the driver. This was followed by coach (8.9%) and train (5.4%).

Airport used in the most recent plane journey

Respondents who used a plane at least once a year (56.3%) were asked which UK airport they used on their most recent journey, if the purpose was business or pleasure and how they travelled to the airport. The list of airports included in this survey can be found in our definitions document.

- 42.3% of respondents used Bristol Airport for their most recent plane journey. 22.2% of respondents used a London airport. Cardiff Airport was used by 17.4% of respondents, with Manchester used by 17.1%.
- Bristol was the most commonly used airport by respondents from South East and South West Wales at 56.7% and 53.0% respectively. For Mid Wales respondents, Birmingham Airport was the most commonly used at 24.9%. In North Wales, 74.5% of respondents used Manchester Airport.
- 93.4% of respondents used a plane for pleasure and 5.6% of respondents for business.
- 70.2% of respondents travelled to an airport using a car, either as a passenger or the driver. This was followed by taxi (12.2%) and train (9.5%).

Experience when travelling by other modes

We asked users additional questions about their experience on their most recent journey. We have defined a community transport user as any respondent who reported having travelled by community transport at least once or twice during the year. This corresponded to 11.0% of respondents.

For boat or ferry, we have defined a user as any respondents who reported having used Holyhead, Fishguard or Pembroke ports on their most recent journey. This corresponds to 4.7% of respondents.

We have defined a plane user as any respondents who reported having used Cardiff Airport on their most recent journey. This corresponds to 17.4% of respondents.

Satisfaction with overall community transport journey

- 69.0% of respondents who used community transport were satisfied with their overall journey (25.2% very satisfied and 43.9% fairly satisfied). 11.5% of respondents felt dissatisfied (8.0% fairly dissatisfied and 3.5% very dissatisfied).
- 69.4% of non-disabled respondents were satisfied with the overall journey compared to 74.5% of disabled respondents.

Satisfaction with overall experience at the port

- 96.0% of respondents who used a ferry or boat reported feeling very or fairly satisfied with their overall experience (43.9% very satisfied and 52.2% fairly satisfied). 3.4% reported feeling fairly or very dissatisfied.

Satisfaction with overall experience at the airport

- 91.9% of respondents who used a plane reported feeling satisfied with their overall experience (51.2% very satisfied and 40.6% fairly satisfied). 6.4% reported feeling fairly dissatisfied and 1.0% felt very dissatisfied.

Satisfaction with safety: Community transport

- 74.4% of respondents who used community transport reported feeling very or fairly satisfied with their safety (33.1% very satisfied and 41.3% fairly satisfied). 7.2% of respondents reported feeling dissatisfied with safety on their most recent journey (5.3% fairly dissatisfied and 1.9% very dissatisfied).

Satisfaction with safety: Ferry or boat journey

- 96.3% of respondents who used a boat or ferry reported feeling very or fairly satisfied with their safety (51.6% very satisfied and 44.8% fairly satisfied) and 2.5% of respondents reported feeling dissatisfied.

Satisfaction with safety: Plane journey

- 95.9% of respondents who used a plane reported feeling very or fairly satisfied with their safety (57.0% very satisfied and 38.9% fairly satisfied). 3.6% of respondents felt very or fairly dissatisfied.

Satisfaction with accessibility of the vehicle: community transport

- 73.5% of respondents who used community transport reported feeling very or fairly satisfied with the accessibility of the vehicle (33.0% very satisfied and 40.5% fairly satisfied). 5.1% of respondents reported feeling fairly dissatisfied and 2.7% felt very dissatisfied.
- 76.5% of disabled respondents were satisfied with the accessibility of the vehicle compared to 72.1% of non-disabled respondents.

Satisfaction with accessibility at the port

- 93.9% of respondents were satisfied with the accessibility at the port (48.1% very satisfied and 45.8% fairly satisfied). 3.4% of respondents were very or fairly dissatisfied.

Satisfaction with accessibility at the airport

- 93.3% of respondents who used a plane reported feeling very or fairly satisfied with accessibility while at the airport (56.1% very satisfied and 37.2% fairly satisfied). 4.8% of respondents felt very or fairly dissatisfied.

Feeling of welcomeness: Community transport

- 76.4% of respondents reported that they felt welcome on their most recent community transport journey (32.0% very welcome and 44.3% fairly welcome). 5.8% reported they felt unwelcome.
- A higher proportion of disabled respondents felt welcome (81.4%) using community transport than non-disabled respondents (74.8%).

Why respondents felt unwelcome: Community transport

- 5.8% of community transport users reported feeling unwelcome on their most recent community transport journey. We asked these users about why they felt unwelcome.
- 57.4% reported they felt unwelcome because of other passengers, 40.6% reported their surroundings and 18.8% because of staff.

Feeling of welcomeness: Boat or ferry

- 97.1% of respondents reported that they felt welcome at the port on their most recent journey by boat or ferry. (54.1% very welcome and 43.0% fairly welcome). 2.2% reported they felt very or fairly unwelcome.

Feeling of welcomeness: Plane

- 95.6% of respondents reported that they felt welcome at the airport on their most recent journey (58.7% very welcome and 36.9% fairly welcome). 3.7% reported they felt very or fairly unwelcome.

Why respondents felt unwelcome: Plane

3.7% of respondents reported feeling unwelcome on their most recent plane journey. We asked these users why they felt unwelcome.

- About three quarters of respondents (73.0%) reported that they felt unwelcome because of airport staff.

Welsh language use:

We asked users who could communicate in Welsh what language they used when travelling by the various modes. More information on how we have defined Welsh language users can be found in our definitions document.

Welsh language use on community transport

- 81.9% of respondent who used community transport used English and 20.1% used Welsh.
- Of the 68.8% of respondents who did not use Welsh, 11.4% wanted to use Welsh but were unable to.

Welsh language use at the port on a boat or ferry journey

- 95.7% of respondents who used a boat or ferry used English and 21.2% used Welsh.
- Of the 78.8% of respondents who did not use Welsh, 14.9% of respondents wanted to use Welsh but were unable to.

Welsh language use at the airport on a plane journey

- 96.9% of respondents who used a plane used English and 11.6% used Welsh.
- Of the 88.4% of respondents who did not use Welsh, 8.4% of respondents wanted to use Welsh but were unable to.