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WALES NATIONAL TRAVEL SURVEY

Wales National Travel Survey: Rail 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 rail travel. It brings together information on how people travel by rail, and their attitudes and opinions on rail 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 1.9% of journeys per person per year were made by rail.
- 69.6% of rail journeys were made by the 10.5% of respondents who travel by rail at least once per week.
- Walking and wheeling was the most common mode used to (70.7%) and from (68.5%) railway stations.
- 78.6% of rail users were either very or fairly satisfied with their overall train journey.
- "Cheaper, simpler tickets" was the most popular factor that would encourage rail users to travel by train more often (60.2%).
- The weighted cost per kilometre travelled by train was £0.24.

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 rail

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

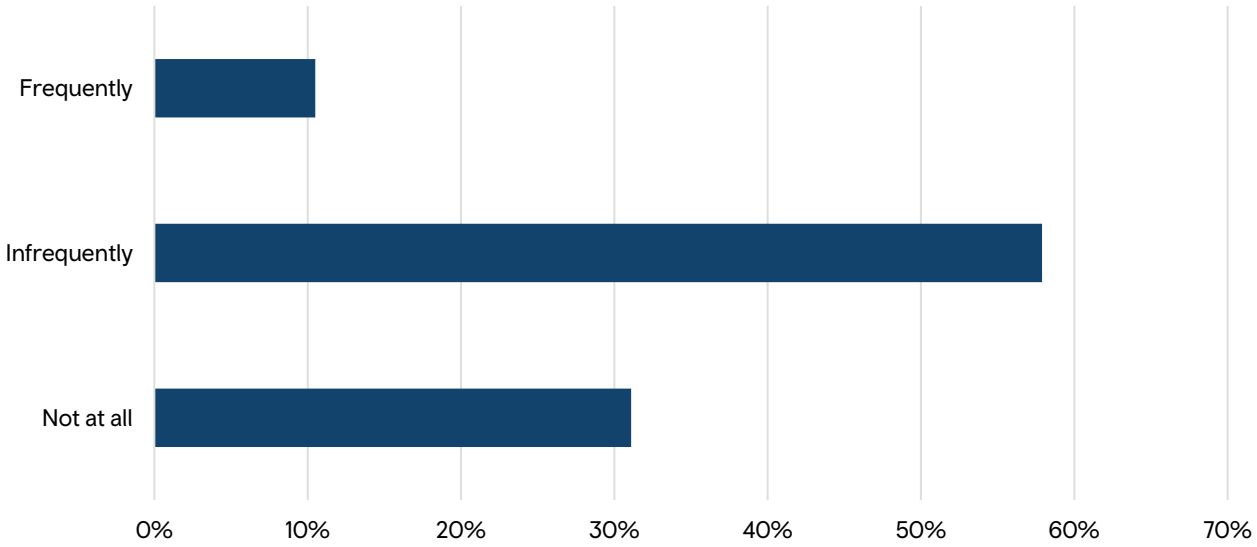
- 10.5% of respondents reported travelling by rail at least once per week (2.7% most days, 4.1% several times a week and 3.7% once a week).

- 57.8% of respondents travelled by rail infrequently, with 14.9% of respondents using the train once or twice a month, 18.4% once every couple of months, and 24.6% once or twice during the year.

- 31.1% of respondents reported not using the train at all.

Rail: travel frequency

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



Description of Figure 1: A horizontal bar chart showing the percentage of respondents who reported using the train frequently, infrequently and not at all. 10.5% of respondents reported using a train frequently and 57.8% infrequently.

Source: Wales National Travel Survey, travel frequency

Disabled status

- More non-disabled respondents used rail services than disabled respondents. 44.0% of disabled respondents reported not travelling by rail at all in the last 12 months compared to 27.0% of non-disabled respondents.

- 11.0% of non-disabled respondents used a train at least once per week compared to 6.9% of disabled respondents.

Regions

- South East Wales had the highest share of respondents who used the train at least once per week (13.8%), followed by Mid Wales (8.2%), North Wales (7.9%) and South West Wales (6.7%).

- Mid Wales had the highest share of respondents who did not travel by rail at all (38.0%) followed by North Wales (34.0%), South West Wales (32.8%). South East Wales had the lowest share with 28.1%.

Age group

- 22.7% of respondents aged 16-24 used a train at least once per week, the highest share for any age group.

- Only 3.9% of respondents aged 85 or above travelled by rail at least once per week, the lowest share for any 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.

- Frequent rail use is higher in more deprived areas with 13.1% of respondents in Q1 using the train at least once per week compared to 8.5% in Q5.

- 34.2% of respondents in Q1 reported not travelling by rail at all in the last 12 months compared to 26.0% of respondents in Q5.

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.

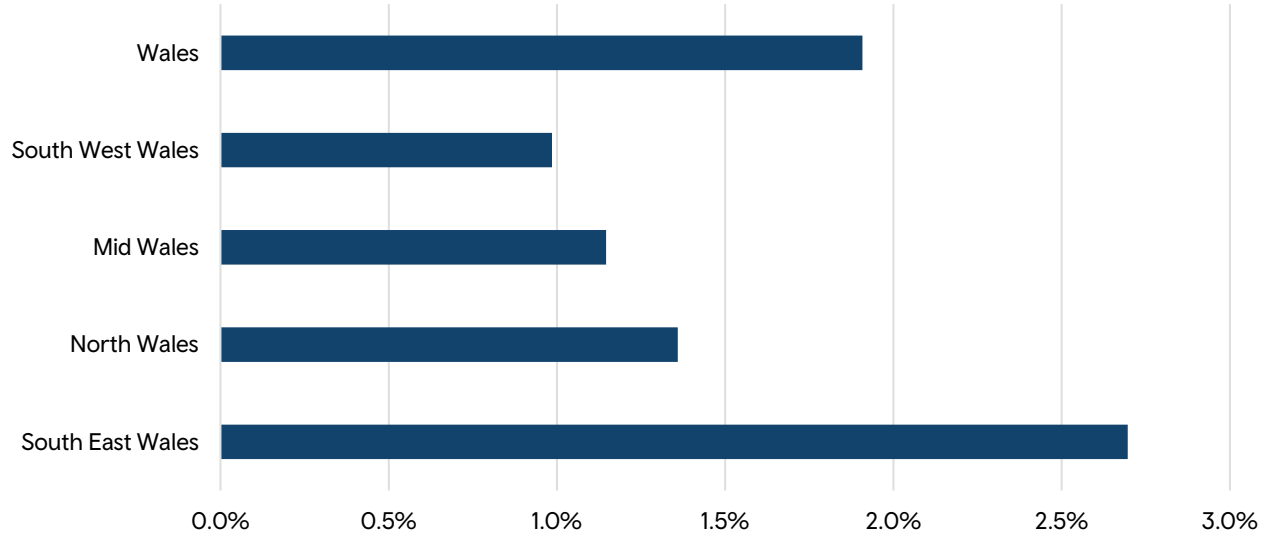
In 2025/26, we estimate that respondents made 11.9 journeys per person per year by rail.

- Overall, rail was used as the main mode of travel in 1.9% of all journeys. This accounted for 33.7% of all public transport journeys (35.3 journeys per person per year) in 2025/26.

- 2.3% of journeys by residents in urban areas were made by rail compared to 1.0% of journeys by those in rural areas.

Rail: Main mode share by region

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



Description of Figure 2: A horizontal bar chart showing the share of journeys per person per year by rail. 2.7% of journeys in South East Wales are made by rail, above the national average (1.9%).

Source: Wales National Travel Survey, main mode share

Main mode share by travel frequency

- Rail journeys are mostly made by a small share of the population. Frequent rail users, who travel by rail at least once per week, account for 10.5% of respondents but made 69.5% of all rail journeys. These frequent rail users made 13.7% of their journeys by rail (78.7 journeys per person per year).

- 57.8% of respondents were identified as infrequent rail users. These respondents made 0.9% of their journeys by rail (6.2 journeys per person per year) and accounted for 30.0% of all rail journeys.

- A further 31.1% of respondents indicated that they did not travel by rail at all and correspondingly made fewer than one journey per person per year by rail.

- While a greater share of journeys were completed by bus (3.7%) than rail (1.9%), throughout the year we estimate that more people made at least one journey by rail (68.3%) compared to bus (54.9%).

Main mode share by Wales Index of Multiple Deprivation

- Residents of the most deprived 20% of areas in Wales made 2.3% of their journeys by rail. This reduced as the level of deprivation reduces, though by a small amount. Residents of the least deprived 20% of area in Wales made 1.6% of their journeys by rail.

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.

- There was no clear trend in the share of journeys by rail by income deprivation. We estimate that residents in the most income deprived 20% areas (Q1) of Wales made 2.3% of their journeys by rail, equal to the share made by those in Q2 and Q5.

- We observed that residents in the most deprived 20% of Wales by access to services made the fewest journeys by rail (0.9% of all journeys, or 5.8 journeys per person per year).

- Those with the greatest access to services (the least deprived 20% of Wales) made 2.5% (16.0 journeys per person per year) of their journeys by rail, the highest share by of these groups.

Main mode share by the sex of the respondent

- There were very little differences in the share of journeys made by the sex of the respondent. Rail journeys accounted for 1.9% of journeys for both male and female respondents.

Main mode share by age group

- The share of journeys made by rail decreased with age. We estimate that those aged 16-24 made 4.5% of their journeys by rail, the highest share by age group. Those aged 25-44 made 2.6% of journeys by rail.

- Respondents aged 45-64 made 1.3% of their journeys by rail, while older age groups made 0.9% of their journeys by rail (65-74 and 75+).

Main mode share by disabled status

- Non-disabled respondents made 2.0% of their journeys by rail compared to 1.3% of respondents who were disabled.

Main mode share by driving licence ownership

- For respondents without a full driving licence, 4.6% of journeys were made by rail. Those with a driving licence made 1.4% of journeys by rail.

- For comparison, the main mode share by bus was 14.0% of journeys among those who do not hold a full driving licence compared to 1.7% 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, 17.8% used a train as the main mode of travel. Another 4.1% of multimodal journeys used rail as an additional mode of travel.

- A total of 2.3% of all journeys involved rail, either as the main (1.9%) or as an additional (0.4%) mode of travel. This corresponded to 14.6 journeys per person per year that used rail at any stage.

- Journeys that included rail were the third most common type of multimodal journey, behind those that included using a car and those that included travelling by bus.

Journeys to and from railway stations

- 70.7% of journeys to and 68.5% from railway stations were made by walking and wheeling.

- 18.8% of journeys to the railway station were made by car, 4.8% by bus and 1.8% by cycle.

- 48.2% of journeys to railway stations were under 1km long, with another 40.3% of journeys being between 1km and 5km.

- Similarly, 42.0% of journeys from the railway station to the destination were under 1km long. Another 48.4% of journeys from the railway station were between 1km and 5km long.

Journey distance

The journey distance by rail is the track length of the most direct route between two railway stations. The total distance also includes the most direct possible route from the origin to the origin railway station, and from the destination railway station to the final journey 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.

- Rail journeys were typically longer than journeys by other modes. The mean distance for a rail journey was 61.2km, with a median distance of 33.1km.

- Overall, respondents travelled 737.1km per person per year by rail. This accounted for 7.6% of the total distance travelled per person per year (9,670.6km).

- 33.8% of rail journeys were between 20km and 50km. 23.9% were between 50km and 80km, with another 15.1% being 80km or longer.

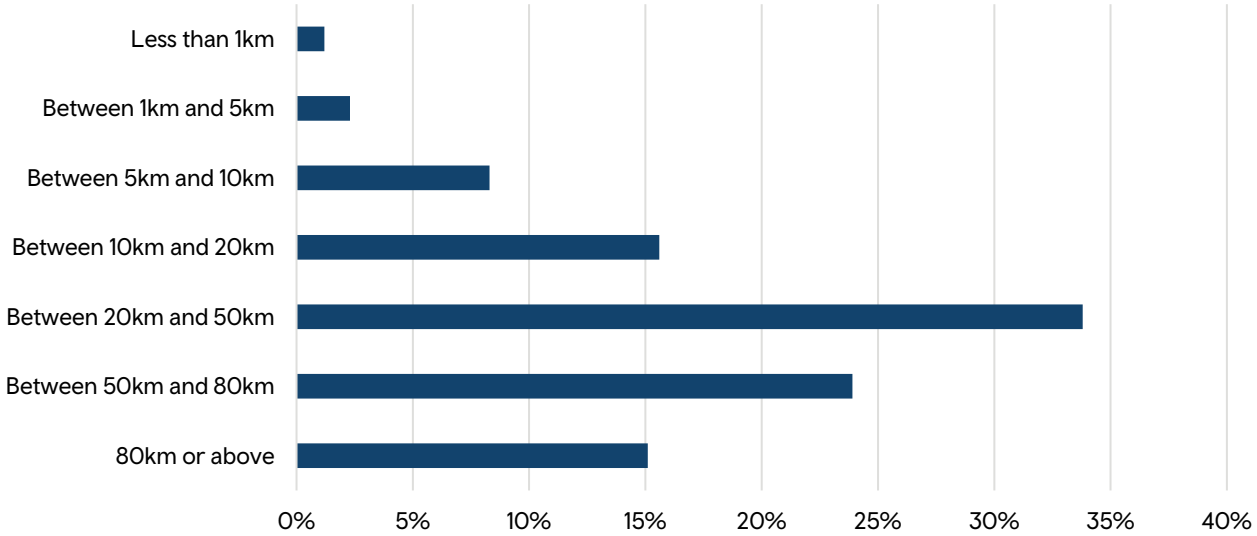
- We estimate that frequent rail users travelled 3,817.2km per person per year by rail, which accounted for 36.9% of their total distance travelled. The mean distance of a rail journey by these users was 48.5km.

- Journeys by infrequent rail users were longer, with a mean journey length of 93.8km.

- The weighted cost per kilometre travelled by rail is £0.24. This excluded those who travelled for free. For more information on cost per kilometre, see our definitions document.

Rail: Share of journeys by distance

Figure 3: Share of rail journeys by distance group, Wales, 2025/26



Description of Figure 3: A horizontal bar chart showing the share of rail journeys per person per year by distance group. Shorter journeys by rail are uncommon, with over half of the journeys being 20km or longer.

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. 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 when travelling by rail was commuting (32.7%). This was higher than the overall share of journeys for commutes (19.3%).
- Journeys to social or entertainment (21.8%) by rail were also more popular than the overall share of journeys for this purpose (17.7%).
- Shopping, the most popular journey purpose overall (23.1%) was less common for rail journeys (14.9%) but remained among the most common purposes selected.

- 13.1% of journeys by rail were for a holiday or day trip compared to only 3.4% of all journeys.

Experience when travelling by rail

We asked rail users additional questions about their experience on their most recent train journey. We have defined a rail user as any respondent who reported having travelled by train at least once every couple of months. This corresponded to 43.7% of all respondents.

Overall journey satisfaction

- 78.6% of respondents reported feeling very or fairly satisfied with their overall journey (33.5% very satisfied and 45.1% fairly satisfied). 10.4% reported feeling fairly dissatisfied and 6.2% reported very dissatisfied.

- 76.1% of disabled respondents reported feeling very or fairly satisfied compared to 80.2% of non-disabled respondents.

- South East Wales had the highest proportion of satisfied respondents at 81.7%, whilst South West Wales was the lowest at 74.1%. 75.7% of respondents in Mid Wales were satisfied with their most recent rail journey, as were 74.8% in North Wales.

- In general, satisfaction with the overall journey by rail decreased over age groups. 81.7% of 16-24 year olds were satisfied, compared to 72.9% of respondents aged 75-84. However, 80.7% of respondents aged 85 or above were satisfied with their overall journey.

Satisfaction with safety

- 86.9% of respondents reported feeling very or fairly satisfied with their safety (43.3% very satisfied and 43.7% fairly satisfied). 6.2% reported feeling fairly dissatisfied and 2.4% reported very dissatisfied.

- 83.7% of disabled respondents reported feeling very or fairly satisfied compared to 88.3% of non-disabled respondents.

- There was little difference in satisfaction with safety and sex with 87.3% of male respondents very or fairly satisfied compared to 87.0% of female respondents.

- There were minor differences in satisfaction with safety across the regions with South East Wales (88.7%) and Mid Wales (88.5%) more satisfied than South West Wales (84.7%) and North Wales (83.4%).

- Satisfaction with safety decreased over the age groups by 13.9 percentage points, with 91.7% of those aged 16-24 feeling satisfied compared to 77.8% of those aged 85 or above.

Satisfaction with features of rail journeys

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

Satisfaction with the availability of information

- 81.6% of respondents were satisfied with availability of information (35.8% very satisfied, 45.8% fairly satisfied). 9.9% reported feeling fairly dissatisfied and 3.2% very dissatisfied.

- Female and male respondents reported similar levels of satisfaction for the availability of information (82.9% and 80.1% respectively).

- 83.6% of non-disabled respondents were satisfied with the availability of information compared to 75.8% of disabled respondents.

Satisfaction with the ticketing

- 82.6% of respondents were satisfied with ticketing (40.7% very satisfied and 41.9% fairly satisfied). 12.7% of respondents were dissatisfied (7.8% very dissatisfied and 4.9% fairly dissatisfied).

- 85.4% of female respondents were satisfied with rail ticketing compared to 79.2% of male respondents.

- More non-disabled respondents were satisfied with ticketing (84.0%) than disabled respondents (77.2%).

Satisfaction with punctuality

- 72.5% of respondents were satisfied with punctuality (29.2% very satisfied, 43.3% fairly satisfied). 14.0% reported feeling fairly dissatisfied and 8.6% very dissatisfied.

Satisfaction with reliability

- 24.1% of users were dissatisfied (15.4% very dissatisfied, 8.8% fairly dissatisfied) with the reliability of their most recent rail journey. This was the factor with the highest share of respondent dissatisfaction among all factors for rail.

- However, 70.7% of respondents were satisfied with reliability (27.3% very satisfied and 43.4% fairly satisfied).

Feeling of welcomeness

- 88.6% of respondents reported feeling welcome on their most recent journey (42.1% very welcome, 46.5% fairly welcome). 6.2% of respondents reported feeling unwelcome (1.0% very unwelcome, 5.2% fairly unwelcome).

- There was little difference between female (89.1%) and male (88.7%) respondents.

- 90.1% of non-disabled respondents reported feeling welcome compared to 85.2% of disabled respondents.

Why respondents felt unwelcome

6.2% of users reported feeling unwelcome on their most recent rail journey. We asked these users about why they felt unwelcome.

- "Other passengers" was the source of unwelcomeness for 69.6% of respondents reporting why they felt unwelcome. This was followed by "your surroundings (both on the train and at the station)" (46.3%) and "station and train staff" (23.8%).

- 81.3% of females reported "other passengers" made them feel unwelcome compared to 55.9% of male respondents.

- 29.2% of male respondents reported "station and train staff" made them feel unwelcome compared to 20.9% of female respondents.

- A higher proportion of disabled respondents (80.2%) reported "other passengers" as the source of unwelcomeness compared to non-disabled respondents (68.3%).

- 26.6% of non-disabled respondents reported "station and train staff" as the source of unwelcomeness compared to 10.6% of for disabled respondents.

Welsh language use when travelling by rail

We asked rail users who could communicate in Welsh what language they used when travelling by train. 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 (94.8%) during their rail journey. 27.3% used Welsh.

- The 72.7% who had then said they had not used Welsh were asked a follow up of did they want to communicate in Welsh. 88.2% did not want to communicate in Welsh while 6.7% 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 did not start their journey with.

- About three quarters of respondents (76.8%) felt very or fairly satisfied with their ability to travel independently.

- Only 5.3% of respondents said they felt very (2.4%) or fairly dissatisfied (2.9%) with their ability to travel independently. 10.7% reported that they do not travel by train.

- 57.4% of disabled respondents were satisfied with their ability to travel independently by rail compared to 86.3% of non-disabled respondents.

Discounted travel card and ticket information

- 18.5% of respondents held a discounted or concessionary travel card or pass. 79.7% of respondents did not hold a pass.

Affordability of rail travel

Questions on the affordability of train 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 (79.7%) were asked if they felt they could travel for a variety of purposes.

- 35.1% of respondents reported they could afford to travel for all purposes. 32.2% reported 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.

- 13.1% reported they could not afford to travel at all.

Respondents with discounted travel

Respondents with discounted travel (18.5%) were asked if they felt they could travel for the same set of purposes.

- 15.6% of respondents reported their travel card allows them to travel for free.

- 32.1% of respondents reported they could afford to travel for all purposes. 41.4% reporting 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.

- 6.5% reported they could not afford to travel at all.

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

- 38.7% of respondents reported they felt they could afford to travel for all purposes without discounted travel. A further 40.2% 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.

- 21.8% reported they felt they would not be able to afford to travel at all.

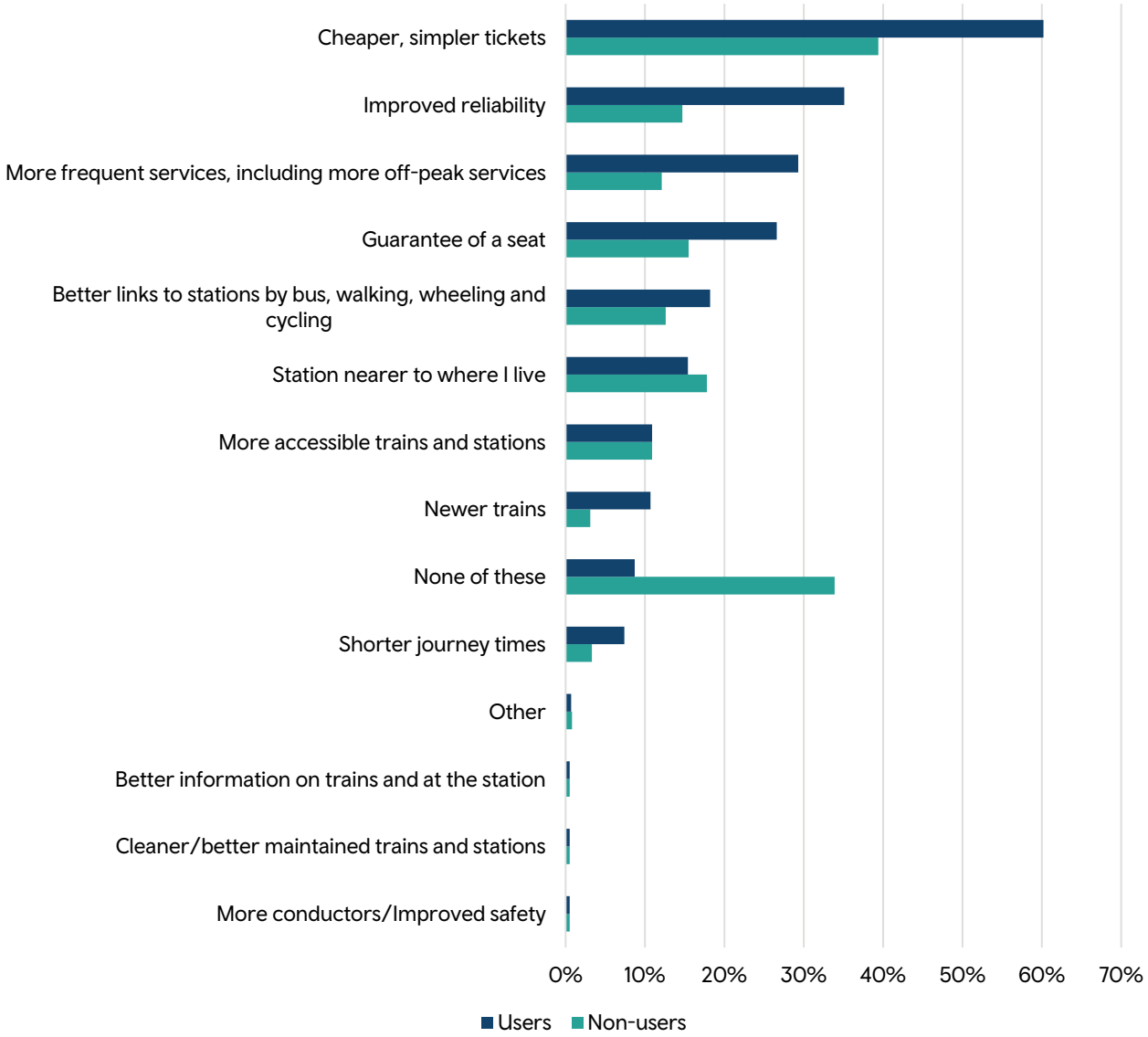
Factors that would encourage users to travel by rail more often

- 65.6% of respondents are considered rail users.

- The most popular factors that would encourage more users to travel by train were “cheaper, simpler tickets” (60.2%), “improved reliability” (35.1%) and “more frequent services, including more off-peak services” (29.3%).

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.

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

- The most popular factors among non-disabled rail users were similar to the overall shares, with 62.0% selecting "cheaper, simpler tickets", 35.9% "improved reliability" and 30.6% "more frequent services, including more off-peak services". "Guarantee of a seat" was selected by 25.5% of non-disabled respondents as the fourth most commonly selected factor.

- 53.8% of disabled respondents selected "cheaper, simpler tickets", 33.9% selected "improved reliability" and 29.0% selected "guarantee of a seat".

Regions

- All regions in Wales selected "cheaper, simpler tickets" as the most common factor that would encourage rail use, ranging from 50.1% in Mid Wales to 63.5% in South West Wales.

- "Improved reliability" was the second most selected factor for all regions – 31.3% in North Wales to 40.5% in Mid Wales.

- Respondents in South East Wales and Mid Wales reported "More frequent services" as the third most common factor (29.3% and 30.3% respectively) while South West Wales and North Wales reported "guarantee of a seat" (29.4% and 31.1% respectively).

Age group

- "Cheaper, simpler tickets" was the most common factor across all age groups, other than those 85 or above where it was second highest (behind "none of these" at 35.1%). It was selected by 29.0% of respondents aged 85 or above, and 67.9% of respondents aged 16-24.

- "Improved reliability" was typically the second most commonly selected factor by respondents in age groups between 16-24 to 75-84. This ranged from 28.3% of respondents aged 75-84 and 38.6% of respondents aged 25-34.

- "Guarantee of a seat" and "more frequent services" were also commonly selected with responses ranging from 23.0% of aged 85 or above to 34.1% of aged 55-64.

- 19.1% of those aged 85 or above selected "better links to stations by bus, walking, wheeling and cycling" as the third most commonly selected factor.

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

- 31.1% of respondents are considered non-users of rail.

- The most popular factor that would encourage non-users to use a train was "cheaper, simpler tickets" (39.4%), followed by "none of these" (33.9%) and "a station nearer to where I live" (17.8%).

Sex of respondents

- A higher proportion of male respondents selected "cheaper, simpler tickets" (42.5%) compared to female respondents (37.0%). However, the other responses aligned with the overall shares and were relatively similar in proportion.

Disabled status

- While the most popular options were the same between disabled and non-disabled respondents, 28.7% of non-disabled respondents selected "none of these" compared to 44.2% of disabled respondents.

- "Cheaper, simpler tickets" were selected by 45.6% of non-disabled respondents and by 27.5% of disabled respondents.

Regions

- "Cheaper, simpler tickets" was the most commonly selected factor in South West Wales (47.3%), North Wales (37.6%) and South East Wales (37.4%). In Mid Wales, the highest proportion of respondents selected "station nearer to where I live" (36.9%).

- "None of these" was a commonly selected factor in all regions, ranging from 27.6% in Mid Wales to 37.2% in North Wales.

- In North Wales, 15.0% of respondents selected "guarantee of a seat" and in South West Wales, 17.6% of respondents selected "improved reliability" as the third most common factor.

By age group

- "None of these" was a commonly selected factor across all age groups. However, it was significantly higher in those aged 85 or above (66.4%) compared to other ages, with 42.1% of those aged 75-84 being the next highest.

- "Cheaper, simpler tickets" was the most common factor across all age groups, other than those 85 or above where it was fourth highest. It was selected by 10.6% of respondents aged 85 or above and 47.8% of respondents aged 35-44.

- "Improved reliability" was selected by a higher proportion of respondents in younger age groups with 24.4% and 20.0% of those aged 16-24 and 25-34 selecting this factor. "Guarantee of a seat" and "station nearer to where I live" were typically the third most common factors selected for age groups 35-44 to 85 or above.