AROLWG TEITHIO CENEDLAETHOL CYMRU

WALES NATIONAL TRAVEL SURVEY

Travel attitudes: 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 travel attitudes. By this, we mean the opinions and attitudes of respondents on topics such as their satisfaction and the feeling of welcomeness they experienced using different modes of travel. It also includes how frequently they use different travel modes.

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

- Car, and walking and wheeling were the most regularly used modes, with 82.7% and 69.2% of respondents respectively using these modes at least once per week.
- Most respondents were very or fairly satisfied with both their overall journey and safety across all modes of travel. Overall journey satisfaction ranged from 66.3% for those who cycled to 96.0% who used a ferry or boat.
- Satisfaction with safety ranged from 59.4% for those who cycled to 96.3% who used a ferry or boat.
- 66.9% of respondents felt welcome when cycling, the lowest share across all modes. For other modes, the reported feeling of welcomeness was typically around or exceeded 90%.

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%.

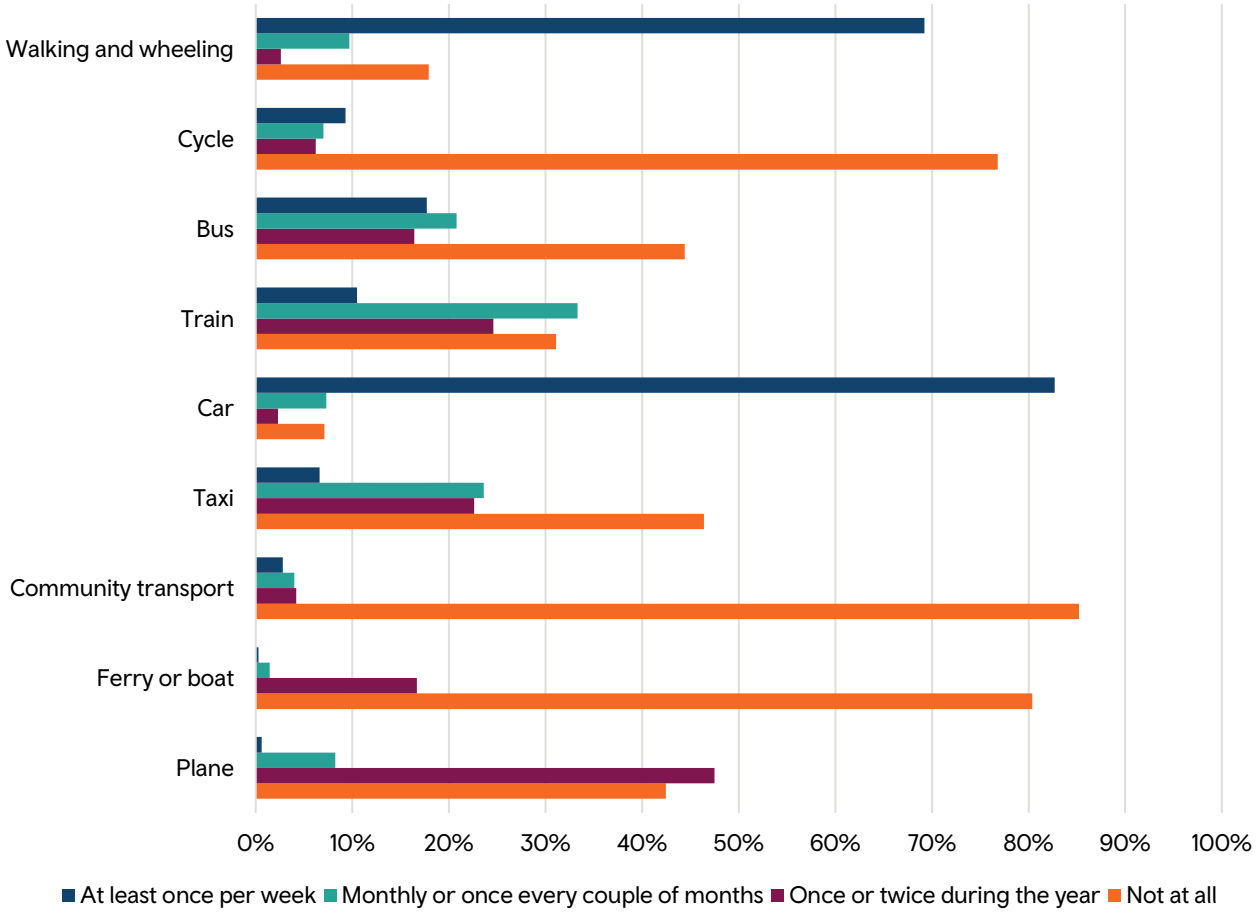
Travel frequency by mode

All respondents were asked how frequently they travelled using different modes of travel over the last 12 months.

- Most respondents used a car at least once per week (82.7%). Only 7.1% of respondents did not use a car at all.
- Most respondents reported that they walked or wheeled at least once per week (69.2%). 17.9% of respondents reported that they did not walk or wheel at all.
- Only 9.3% of respondents reported cycling at least once per week whereas 76.8% reported not cycling at all.
- 17.7% of respondents used the bus at least once per week while 44.4% of respondents indicated they did not use bus at all.
- 10.5% of respondents travel by rail at least once per week, compared to 31.1% who did not travel by rail at all. 33.2% of respondents used rail monthly or once every couple of months.
- Only 6.7% of respondents used taxis at least once per week, compared to 46.4% who did not travel by taxi at all. 23.6% used taxis monthly or once every couple of months.

Travel frequency by mode over the past 12 months

Figure 1: How frequently respondents used different modes of travel over 12 months, Wales, 2025/26



Description of Figure 1: This bar chart shows the percentage of respondents who reported travelling by car, walking and wheeling, bus, cycling, train, taxi, community transport, boat/ferry and plane at least once a week, at least once a month, at least once per year and not at all within the last 12 months. Car was the highest reported means of travel used at least once a week at 82.7%. This was followed by walking and wheeling at 69.2%. Train was the highest reported means of travel used monthly or once every couple of months at 33.2% followed by taxi at 23.6%. 85.2% of respondents reported not using community transport at all, and 80.4% reported not using a ferry or boat at all.

Source: Wales National Travel Survey, travel frequency

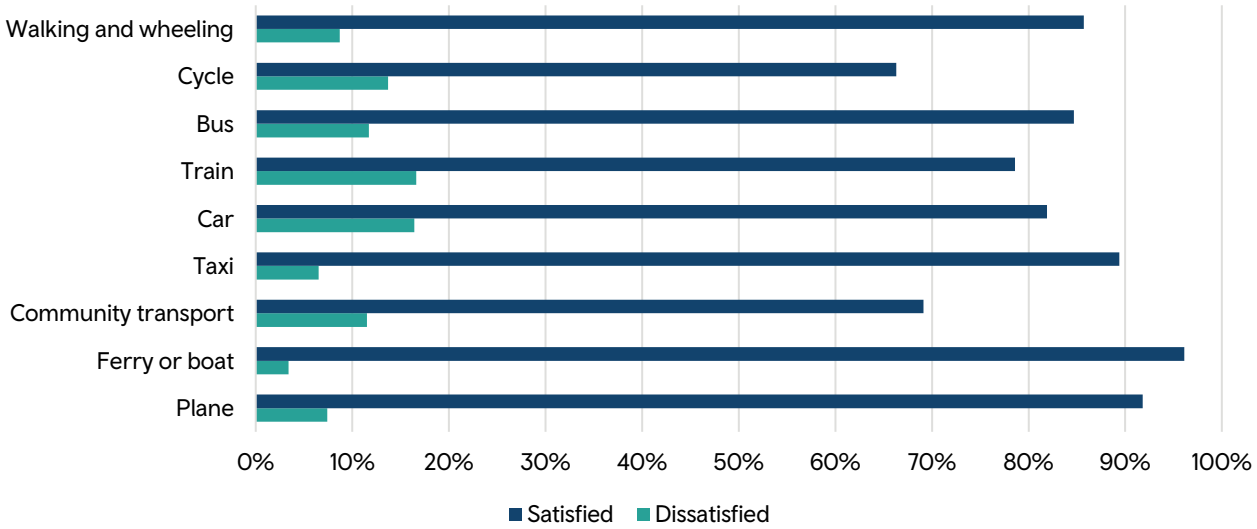
Satisfaction with overall journey

Respondents were asked to consider their overall journey satisfaction from their most recent journey by each mode used.

- Most respondents were satisfied (either very satisfied or fairly satisfied) with their overall journey. Cycling had the lowest satisfaction rate (66.3%), whereas ferry or boat had the highest share of satisfied users (96.0%).
- Less than 20% of respondents reported feeling dissatisfied (either very dissatisfied or fairly dissatisfied) with their overall journey for all modes.

Overall journey satisfaction by mode of travel

Figure 2: The percentage of respondents feeling satisfied or dissatisfied with the overall journey for each mode of travel, Wales, 2025/26



Description of Figure 2: This bar chart shows the percentage of respondents feeling satisfied or dissatisfied with the overall journey for ferry or boat, plane, taxi, walking and wheeling, bus, car, train, community transport and cycling. Over 80% of respondents were satisfied with the overall journey for ferry or boat (96.0%), plane (91.9%), taxi (89.3%), walking and wheeling (85.7%), bus (84.8%) and car (81.9%). Respondents reported the lowest level of satisfaction for cycling at 66.3%.

Source: Wales National Travel Survey, satisfaction with overall journey and safety

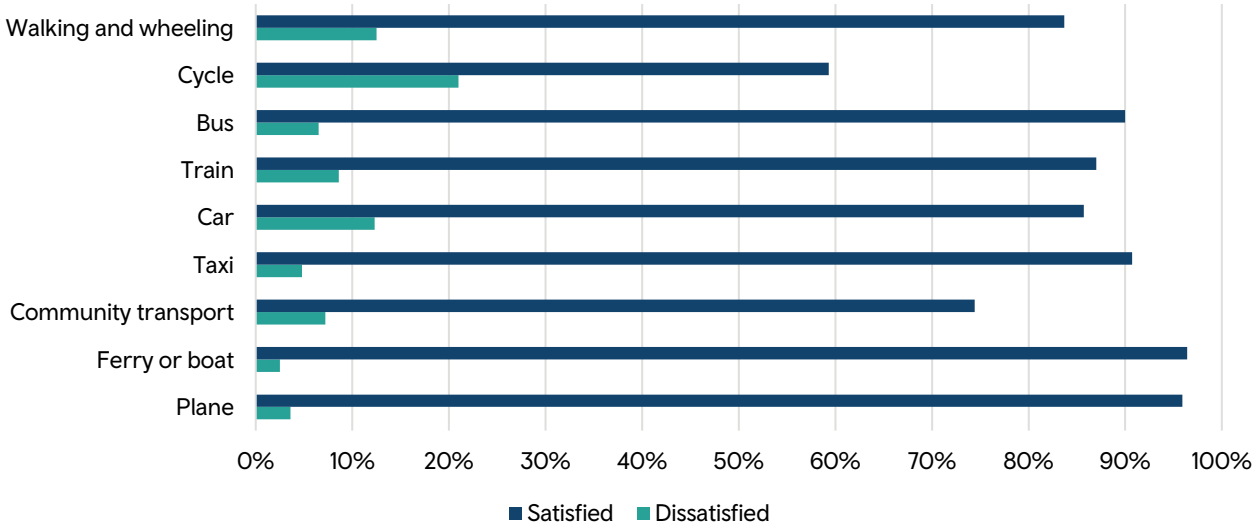
Satisfaction with safety

Respondents were asked to consider satisfaction with safety from their most recent journey.

- The majority of respondents were very or fairly satisfied with safety, ranging from 59.4% who cycled to 96.3% who used a ferry or boat.

Levels of satisfaction with safety by mode of travel

Figure 3: The percentage of respondents feeling satisfied or dissatisfied with safety for each mode of travel, Wales, 2025/26



Description of Figure 3: This bar chart shows the percentage of respondents feeling satisfied or dissatisfied with safety for ferry or boat, plane, taxi, bus, train, car, walking and wheeling, community transport and cycling. Over 80% of respondents were satisfied with the overall journey for ferry or boat (96.3%), plane (95.9%), taxi (90.7%), bus (90.0%), train (86.9%), car (85.7%) and walking and wheeling (83.7%). Respondents reported the lowest level of satisfaction for cycling at 59.4%.

Source: Wales National Travel Survey, satisfaction with overall journey and safety

Satisfaction with overall journey compared to satisfaction with safety

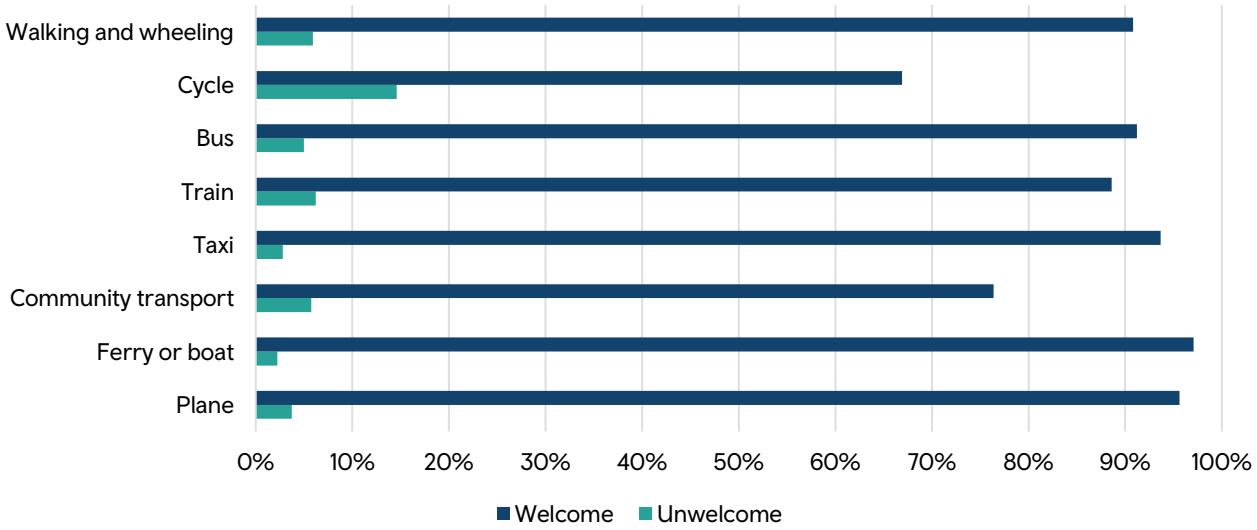
- For all modes of travel other than walking and wheeling and cycling, respondents felt more satisfied with their safety compared to their overall journeys. The largest difference was train with 86.9% satisfied with their safety compared to 78.6% satisfied with their overall journey.
- Respondents reported the lowest levels of satisfaction across both overall journey and safety for cycling. This was 66.3% for satisfaction with overall journey and 59.4% for satisfaction with safety.

Feeling of welcomeness

- Most respondents reported feeling fairly or very welcome while travelling. This ranged from 66.9% who cycled to 97.1% who used a ferry or boat.

Feeling of welcomeness by mode of travel

Figure 4: The percentage of respondents who reported feeling welcome or unwelcome for modes of travel, Wales, 2025/26



Description of Figure 4: This bar chart shows the percentage of respondents feeling welcome or unwelcome for ferry or boat, plane, taxi, bus, walking and wheeling, train, community transport and cycling. Respondents reported high levels of welcomeness for ferry or boat (97.1%), plane (95.6%), taxi (93.7%), bus (91.2%), walking and wheeling (90.8%), and train (88.6%). Respondents reported the lowest level of welcomeness for cycling at 66.9%.

Source: Wales National Travel Survey, feeling welcome or unwelcome

Affordability of public transport

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

- Overall, for bus and train travel, respondents reported similar feelings of affordability with and without discounted travel.
- For bus travel, among individuals without discounted travel, almost half of respondents reported that they could afford to travel for all purposes (47.3%).
- For those with discounted travel for bus, 72.0% had a card or pass that enabled them to travel for free and a further 12.0% respondents felt that they could afford to travel for all purposes while using their pass.

- 35.1% of respondents without discounted travel reported they could afford train travel for all purposes.
- For those with discounted travel for rail, 15.6% had a card or pass that enabled them to travel for free and 32.1% reported they could afford to travel by rail for all purposes.

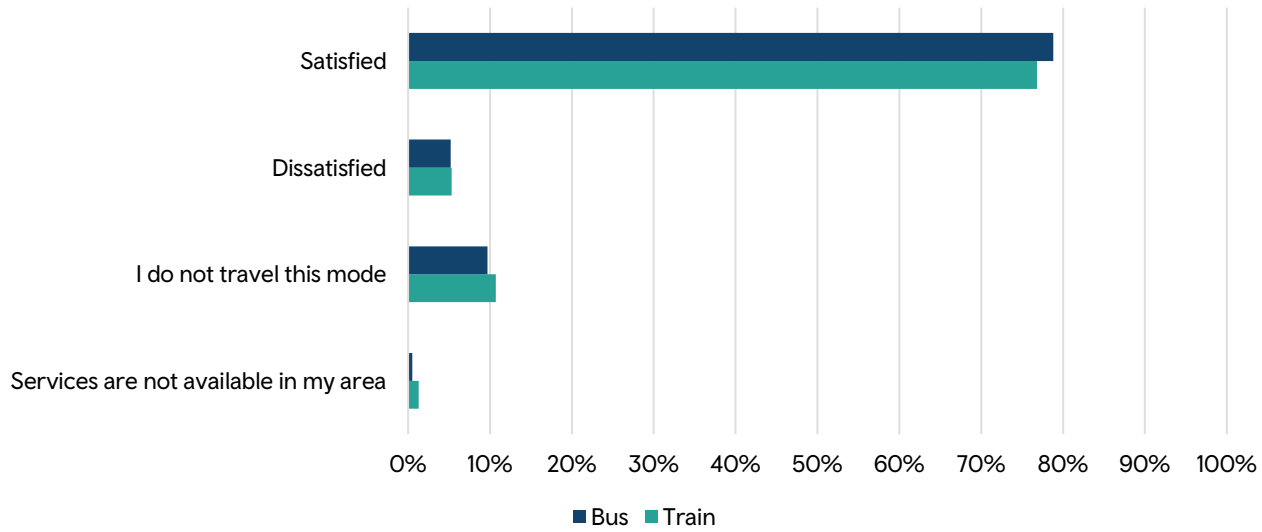
Satisfaction with ability to travel independently

Respondents were asked how satisfied they were with their own ability to travel independently by train or bus without assistance from staff or other passengers.

- Most respondents felt satisfied with their own ability to travel independently by both bus (78.8%) and train (76.8%).
- More respondents reported they do not travel using either bus or train compared to the percentage of respondents who reported feeling dissatisfied with their ability to travel independently. 9.7% respondents said they do not travel by bus and 5.2% bus users reported feeling dissatisfied with their own ability to travel independently. This is similar for train travel – 10.7% of respondents do not travel by train and 5.3% were dissatisfied with their own ability to travel independently.
- The share of respondents who indicated that they do not travel by bus or rail differs between this question and the travel frequency question. This could be due to respondents reporting feeling satisfied with their own ability to travel independently when they have not used bus or train in the last 12 months.

Satisfaction with own ability to independently access public transport

Figure 5: Percentage of respondents satisfied with their own ability to travel independently by bus or train, Wales, 2025/26



Description of Figure 5: This bar chart shows the percentage of respondents satisfied with their

own ability to travel independently by bus and train. Most respondents were satisfied with their ability to travel independently - 78.8% by bus and 76.8% by train. 5.2% and 5.3% reported feeling dissatisfied with their ability to travel independently by bus and train respectively. And 9.7% and 10.7% reported they don't travel using bus or train respectively.

Source: Wales National Travel Survey, affordability and satisfaction with independence for bus and train travel

Satisfaction with ability to travel independently by disabled status

- Of disabled respondents, 60.7% said they were satisfied with their own ability to travel independently by bus, compared to 87.8% who were non-disabled.
- This is similar for train with 57.4% of disabled respondents feeling satisfied with their own ability to travel independently compared to 86.3% of non-disabled respondents.
- A higher proportion of disabled respondents said they do not travel by bus (18.4%) or train (22.0%) compared to the proportion of non-disabled respondents. 6.9% of non-disabled respondents do not travel by bus and 7.0% do not travel by train.

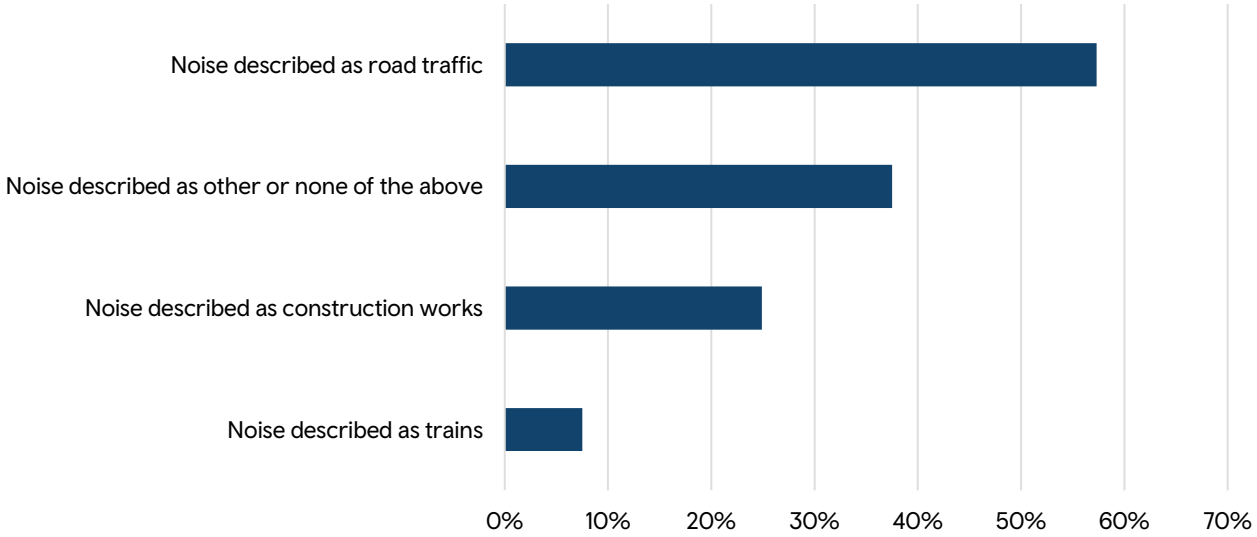
Noise

All respondents were asked if they are bothered by noise from outside their home. The type of noise was then only asked of those who responded 'yes'. Specific questions on road traffic and construction work noise were only asked of those who selected these as a source of the noise.

- About a quarter (26.3%) of respondents reported regularly being bothered by noise from outside their home.
- Road traffic was reported as the source of noise for 57.3% of respondents and construction work noise for 24.9% of respondents.
- When asked about the type of road traffic noise that bothered them, most respondents reported that this was caused by cars (74.8%), followed by motorcycles (57.4%) and heavy goods or construction vehicles (50.5%).
- On the type of construction work noise, just over half of respondents reported this was not from construction work on the railway or road network (54.6%).
- The proportion of people bothered by noise differs across the regions of Wales. The highest proportion was from residents of South East Wales (27.4%). Residents of Mid Wales had the lowest share (21.9%).

Nuisance noise by noise type

Figure 6: Percentage of respondents bothered by noise on a regular basis and the type of noise they have reported as bothering them, Wales, 2025/26



Description of Figure 6: This bar chart shows the percentages of the different sources of noise that respondents reported feeling bothered by. 57.3% described the noise as road traffic noise, 24.9% described it as construction noise and 7.5% described it as train noise. 37.5% of respondents described the noise as other or none of the options we had provided.

Source: Wales National Travel Survey, feeling bothered by noise

Note: The percentage for the type of noise respondents felt bothered by is of those who reported regularly being bothered by noise (1,575 people, 26.3%).