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WALES NATIONAL TRAVEL SURVEY

Wales National Travel Survey: Car 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 travel by car. It brings together information on how people travel, and their attitudes and opinions on travelling by car.

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 74.3% of journeys per person per year were made by car.
- 82.7% of respondents reported using a car at least once a week. 7.1% of respondents reported not using a car at all in the last twelve months.
- 85.8% of the total distance travelled per person per year was by car.
- 15.9% of households do not own or have access to a car or motor vehicle.
- 81.9% of car users were either very or fairly satisfied with their overall car journey.
- Only 35.3% of respondents were satisfied with the road quality.
- The most popular reason why respondents travelled by car was because it was the "most direct route" (49.7%).

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%.

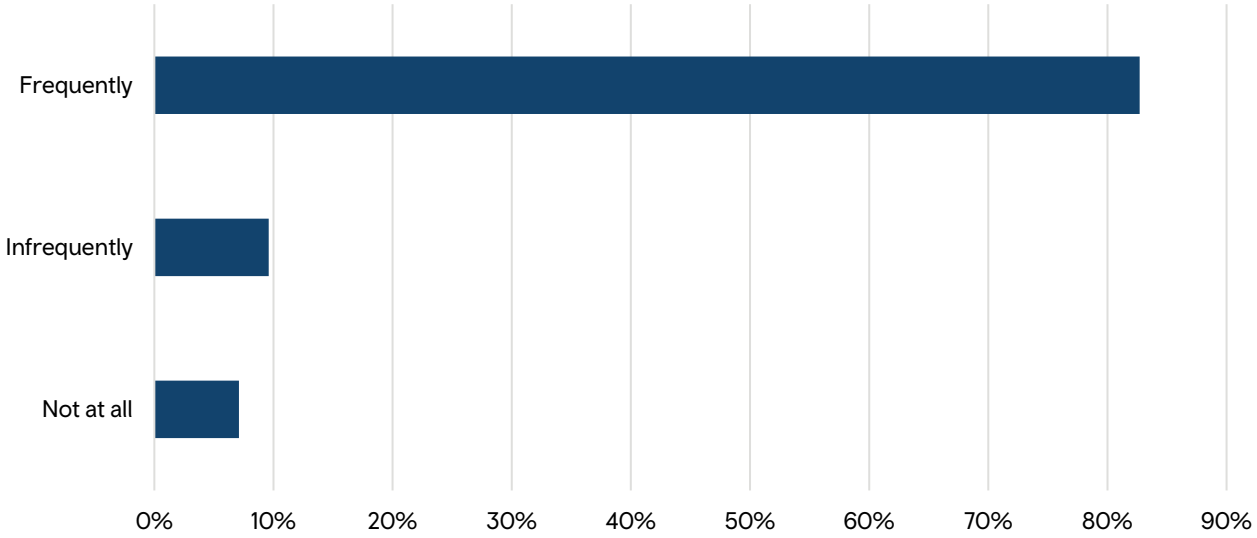
Frequency of travel by car

The travel frequency questions measured how often a person travelled by car within the last twelve months. This may be either as the driver or a passenger. Travel frequency differs from mode share, which is the share of journeys per person per year made by car.

- 82.7% of respondents reported using a car at least once a week (55.8% most days, 20.4% several times a week and 6.5% once a week).
- 9.6% of respondents travelled by car infrequently. 4.7% reported using a car once or twice a month, 2.6% once every couple of months, and 2.3% once or twice during the year.
- 7.1% of respondents reported not using a car at all.

Car: travel frequency

Figure 1: How frequently respondents used a car 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 car frequently, infrequently and not at all. 82.7% of respondents reported using a car frequently. 9.3% of respondents reported using a car infrequently and 7.1% reported not using a car at all.

Source: Wales National Travel Survey, travel frequency

Disabled status

- A higher proportion of non-disabled respondents (86.6%) used a car at least once per week compared to disabled respondents (74.2%).

Regions

- More respondents in Mid Wales used a car at least once per week (86.1%) compared to other regions. 84.8% of respondents in North Wales, 81.8% in South East Wales and 81.4% in South West Wales used a car at least once per week.

Age group

- Car use at least once per week was highest for respondents aged 55-64 at 86.8%. It was less frequent for those aged 16-24 (78.8%), 75-84 (77.3%) and 85 or above (67.0%).

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.

- A higher proportion of respondents reported using a car at least once per week in WIMD Q4 (87.8%) and Q5 (87.1%) than Q1 (74.9%).

Vehicle driving licence holders

We asked all respondents if they held a full driving licence valid in Great Britain to drive either a car, or a motorcycle, scooter or moped.

- 75.8% of respondents reported they held a full driving licence. 22.9% did not own a licence.
- 81.1% of male respondents held a driving licence compared to 72.1% of female respondents.
- The share of non-disabled respondents who held a driving licence (81.2%) was higher than disabled respondents (65.5%).
- Mid Wales had the highest share of residents who held a full driving licence (85.4%) followed by South West Wales (78.2%), North Wales (77.6%) and South East Wales (72.6%).
- The share of respondents who held a full driving licence increased as deprivation decreased from 59.7% in WIMD Q1 to 85.3% in WIMD Q5.

Car ownership

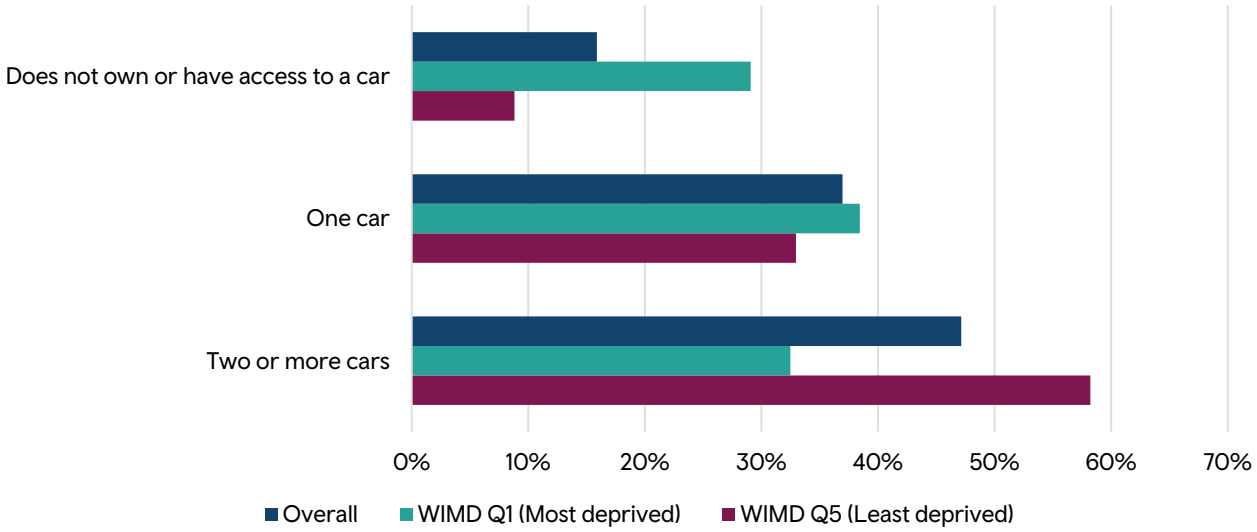
- Across Wales, we estimate that 15.9% of households did not own or have access to a car or other private motor vehicle.
- 37.0% of households had access to one car or other private motor vehicle, with 47.1% having access to two or more cars.
- Among residents of WIMD Q1, 29.1% of households did not have access to a car or private motor vehicle. 38.4% of households had access to one car, and 32.5% of households had access to two or more cars.
- In comparison, car ownership was much greater among those living in WIMD Q5. Only 8.8% of households in these areas did not have access to a car or private motor vehicle, while 58.2% of households had access to two or more.

Electric vehicles

- Electric vehicle (EV) ownership was low. Nationally, we estimate 3.6% of households owned an EV. This was highest among those living in WIMD Q5 (4.7%), and lowest for those living in WIMD Q1 (2.1%).
- EV ownership was relatively evenly spread by region. South West Wales (3.0%) had the lowest share of ownership, followed by North Wales (3.5%). South East Wales and Mid Wales had the joint-highest ownership share, with 3.9% of households owning at least one EV.

Cars per household

Figure 2: Share of households by the number of cars or motor vehicles owned and WIMD quintile, Wales, 2025/26



Description of Figure 2: A horizontal bar chart showing car ownership overall and by WIMD Q1 and Q5. Households in relatively deprived areas (Q1) own fewer cars than those living in less deprived areas (Q5).

Source: Wales National Travel Survey, driving licence and vehicle ownership information

Main mode share

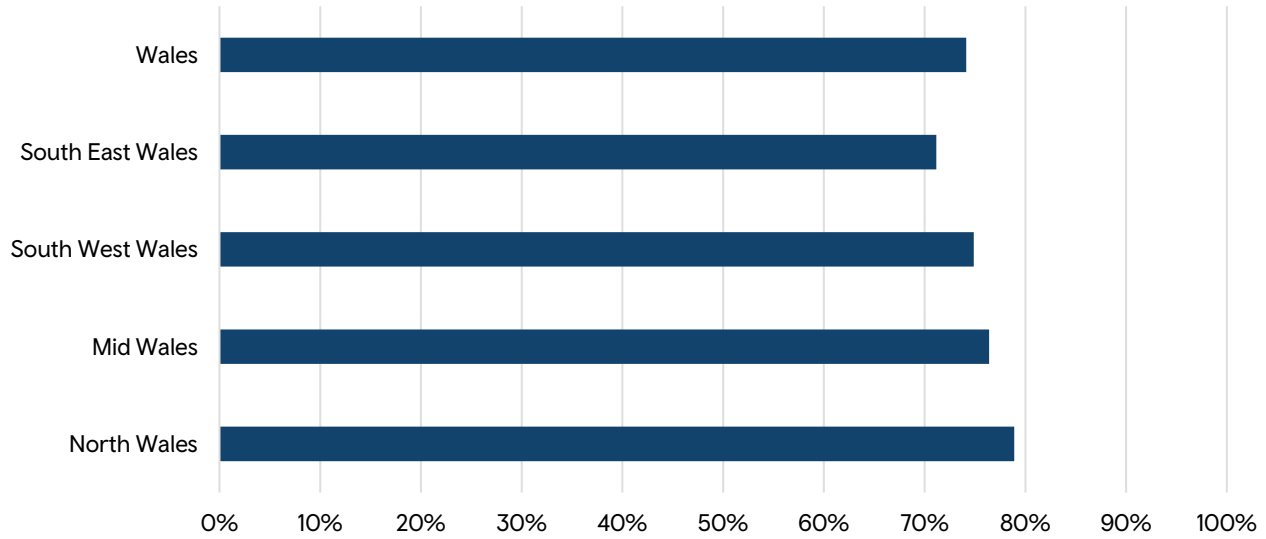
The main mode of travel refers to the mode that was used for the longest distance in a journey. Mode share is the percentage of journeys per person per year completed by a given main mode.

In 2025/26, we estimate that respondents made 463.7 journeys per person per year by car, either as the driver or a passenger.

- Overall, we estimate that 74.3% of journeys per person per year were made by car as the main mode of travel. 80.2% of these journeys were as the driver (59.6% of all journeys), while 19.8% were as a passenger (14.7% of all journeys).
- The majority of car journeys were by petrol cars (50.8%). Diesel cars accounted for 36.2% of all car journeys. Hybrids (7.7%) and EVs (5.0%) were less common.
- Residents of North Wales made the greatest share of their journeys by car (79.1%). This was followed by Mid Wales (76.7%), South West Wales (74.9%) and South East Wales (71.3%).
- Car use was greater in rural areas. Residents of rural areas made 81.9% of their journeys by car, either as the driver or passenger, compared to 70.9% of journeys made by urban residents.

Car journeys: Main mode share by region

Figure 3: share of journeys per person per year by car (either as the driver or passenger), Wales, 2025/26



Description of Figure 3: A horizontal bar chart showing the share of journeys per person per year by car (either as the driver or passenger). 71.3% of journeys in South East Wales were made by car, below the national average (74.3%).

Source: Wales National Travel Survey, main mode share

Main mode share by travel frequency

- 82.7% of respondents were identified as frequent car users, reporting that they travel by this mode at least once per week. These frequent users accounted for 93.7% of all car journeys.

Main mode share by Wales Index of Multiple Deprivation

- People living in more deprived areas made fewer journeys, and a lower share of journeys, by car. Those living in Q1 made 382.1 journeys per person per year by car, or 70.1% of their journeys. Residents of Q4 made the highest share of journeys by car (78.2%, or 525.8 journeys per person per year), but those in Q5 made the most journeys per person per year by car overall (530.8 journeys, or 75.3%).

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.

- Considering the access to service deprivation quintiles, we estimate that the share of journeys by car decreased as access to services improves. Those living in the most deprived 20% of Wales by access to services made 84.5% of their journeys by car, compared to just 66.2% of journeys among those in the least deprived 20%.
- By income deprivation quintiles, the share of journeys by car was lowest among Q1 (68.9%), followed by Q5 (72.9%). Q4 had the largest car mode share at 80.4%.

Main mode share by the sex of the respondent

- Male (74.5%) and female (74.2%) respondents both made a similar share of journeys by car.
- Male respondents made 89.0% of their car journeys as the driver (66.3% of all journeys) and 11.0% of car journeys as a passenger (8.2% of all journeys).
- Female respondents were the driver in 72.3% of their car journeys (53.6% of all journeys) and 27.7% as a passenger (20.5% of all journeys).

Main mode share by age group

- We estimate that respondents aged between 16 and 24 made the lowest share of their journeys by car (54.3%), with the highest share as a passenger (41.0% of car journeys). Respondents aged 45 to 64 made the greatest share of journeys by car (80.4%).

Main mode share by disabled status

- Disabled respondents made 71.2% of their journeys by car compared to 75.6% of non-disabled respondents.

- Disabled respondents also made a greater share of their car journeys as a passenger (30.1%) compared to non-disabled respondents (16.8%).

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).

- Travelling by car was the most common main mode used in multimodal journeys, occurring in 37.6% of multimodal journeys.
- A car, either as the driver or passenger, was used as an additional (non-main) mode of travel in 9.6% of multimodal journeys.
- Cars were not commonly used as modes of travel to or from the bus stop. Only 1.2% of journeys to and 1.4% from bus stops were made by car, either as the driver or passenger.
- In contrast, 18.8% of journeys to and 10.9% of journeys from a railway station were made by a car. This was the second-most popular mode of travel to and from railway stations, after walking and wheeling.

Journey distance

The journey distance by car 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.

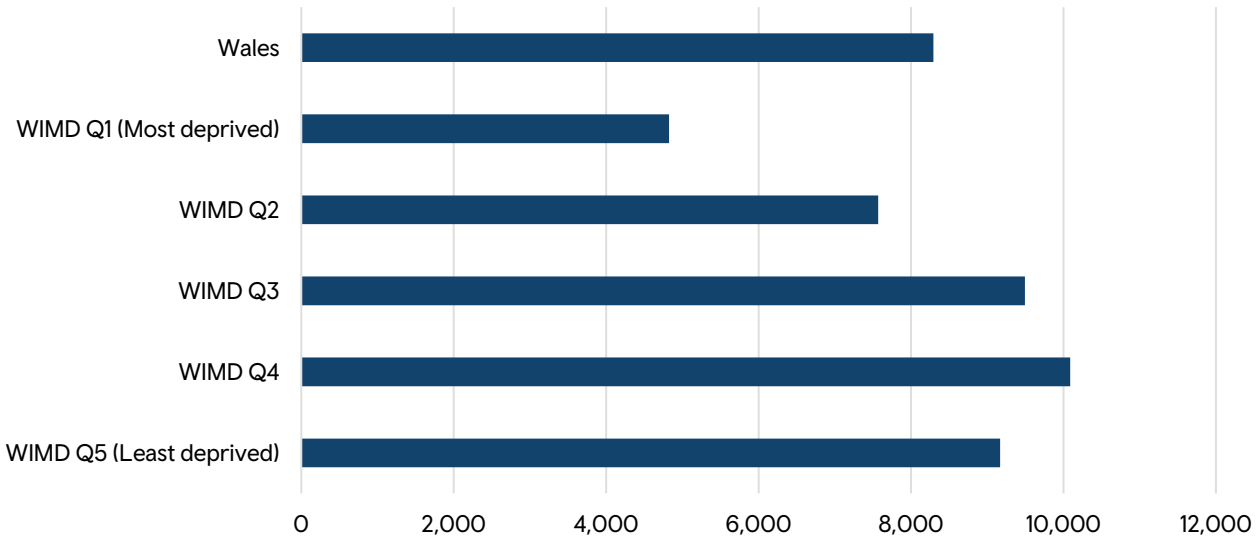
In 2025/26, we estimate that across all modes the mean journey length was 15.5km, with a median journey length of 5.8km.

- In 2025/26, we estimate that people in Wales travelled 8,293.2km per person per year by car, either as the driver or the passenger. This accounts for 85.8% of all distance travelled per person per year.
- The mean journey length by car is 17.9km. Mean journey length as a passenger was typically slightly longer (19.8km) than those as the driver (17.4km). The median journey distance by car, either as the driver or the passenger, was 8.0km.

- A car was used as the main mode of travel in 22.8% (17.2 journeys per person per year) of all journeys under 1km long, and 70.1% (150.8 journeys per person per year) of all journeys between 1km and 5km long. For all other distance groups, car use was even more dominant as the main mode of travel.
- Residents of rural areas travelled 10,949.5km per person per year by car, or 90.6% of their overall distance travelled. This is much greater than the 7,213.9km per person per year (83.0% of total) travelled by car by residents of urban areas.
- Among car journeys, petrol cars covered the largest distance share (44.0%), followed by diesel cars (40.4%). Hybrid vehicles were used in 7.8% of the total car distance and 5.8% by EVs.
- There is a similar inequality in the distance travelled by WIMD Quintiles. Residents of Q1 travelled 4,824.2km per person per year by car. In contrast, individuals living in the least deprived quintile (Q5) travelled 9,168.2km per person per year by car. Residents of Q4 travelled the furthest by car at over 10,087.5km per person per year.

Car journeys: Total distance travelled by WIMD quintile

Figure 4: Total distance travelled (km) per person per year by car (either as the driver or passenger) and WIMD quintile, Wales, 2025/26



Description of Figure 4: A horizontal bar chart showing the total distance travelled per person per year by car (either as the driver or passenger) in kilometres. The most deprived 20% of Wales (Q1) travelled 4,824.2km per person per year, less than half of the 9,168.2km travelled by the least deprived 20% (Q5).

Source: Wales National Travel Survey, journey distance

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 popular journey purpose by car, either as the driver or passenger, matched with the overall most popular journey purposes. Shopping (22.4%) was the most popular journey purpose when travelling by car, followed by commutes (21.1%) and journeys to social or entertainment (17.3%).
- As the car driver, 23.9% of journeys were made for commutes, followed by 21.6% of journeys to shopping. 15.0% were for social or entertainment.
- Journeys as the passenger were slightly different, with journeys to social or entertainment (26.9%) being the most popular journey purpose. 25.9% of journeys as a passenger were for shopping, and 10.0% were commutes to or from work.

Experience when travelling by car

We asked car users additional questions about their experience on their most recent car journey. We have defined a car user as any respondent who reported having travelled by car at least once every couple of months. This corresponded to 89.9% of respondents.

Overall journey satisfaction

- 81.9% of respondents reported feeling very or fairly satisfied with their overall journey (36.2% very satisfied and 45.7% fairly satisfied). 11.4% reported feeling fairly dissatisfied and 5.0% reported very dissatisfied.
- A lower proportion of male respondents felt satisfied with their overall journey (79.7%) compared to female respondents (84.3%).

Satisfaction with safety

- 85.7% of respondents reported feeling satisfied with their safety (38.8% very satisfied and 46.9% fairly satisfied).
- There was little difference between satisfaction with safety and sex with 86.4% female respondents very or fairly satisfied compared to 85.5% of male respondents.
- 12.3% of respondents were dissatisfied with their feeling of safety (9.4% fairly dissatisfied and 2.9% very dissatisfied).

Satisfaction with features of car journeys

Car users were randomly assigned to answer questions about how satisfied they were with:

- The availability of information, journey time reliability and roadside facilities for taking breaks
- Lighting, litter, road quality, signage and verges
- The management of traffic during congestion, during incidents such as collisions or breakdowns, during severe weather and in advance of and during roadworks.

Satisfaction with the availability of information

- 70.1% of respondents reported feeling satisfied with availability of information and 7.1% reported feeling dissatisfied.

Satisfaction with journey time reliability

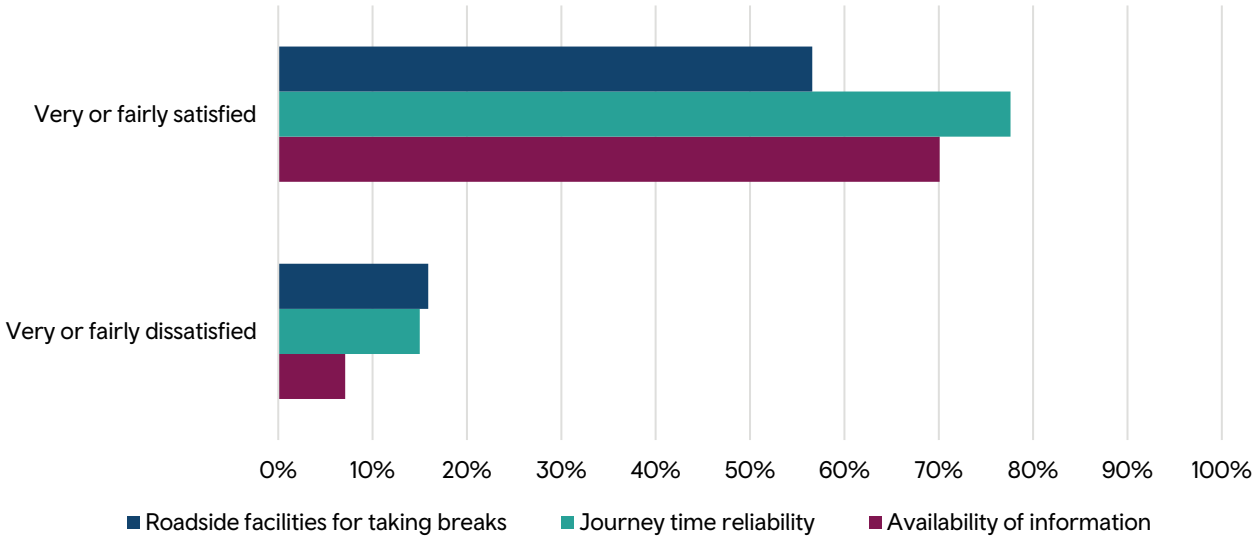
- 77.6% of respondents were satisfied with journey time reliability and 15.0% of respondents were dissatisfied.

Satisfaction with roadside facilities for taking breaks

- 56.6% of respondents were satisfied with roadside facilities for taking breaks and 15.9% of respondents were dissatisfied.

Satisfaction with the availability of information, journey time reliability and the roadside facilities for taking breaks

Figure 5: Percentage of respondents satisfied and dissatisfied with availability of information, journey time reliability and roadside facilities for taking breaks, Wales, 2025/26



Description of Figure 5: A horizontal bar chart showing over half of respondents were satisfied with availability of information, journey time reliability and roadside facilities for taking breaks. A higher proportion of respondents were satisfied with journey time reliability at 77.6%. Less than

20% of respondents were dissatisfied with journey time reliability and roadside facilities and less than 10% were dissatisfied with availability of information.

Source: Wales National Travel Survey, mode specific satisfaction: car

Satisfaction with lighting

- 69.6% of respondents reported feeling satisfied with lighting. 15.4% reported feeling dissatisfied.

Satisfaction with litter

- 52.2% of respondents reported feeling satisfied with litter and 39.2% reported feeling dissatisfied.

Satisfaction with road quality

- 35.3% of respondents reported feeling satisfied with road quality. In contrast, 62.2% reported feeling dissatisfied. This was the factor that had the lowest level of satisfaction among car users.

Satisfaction with signage

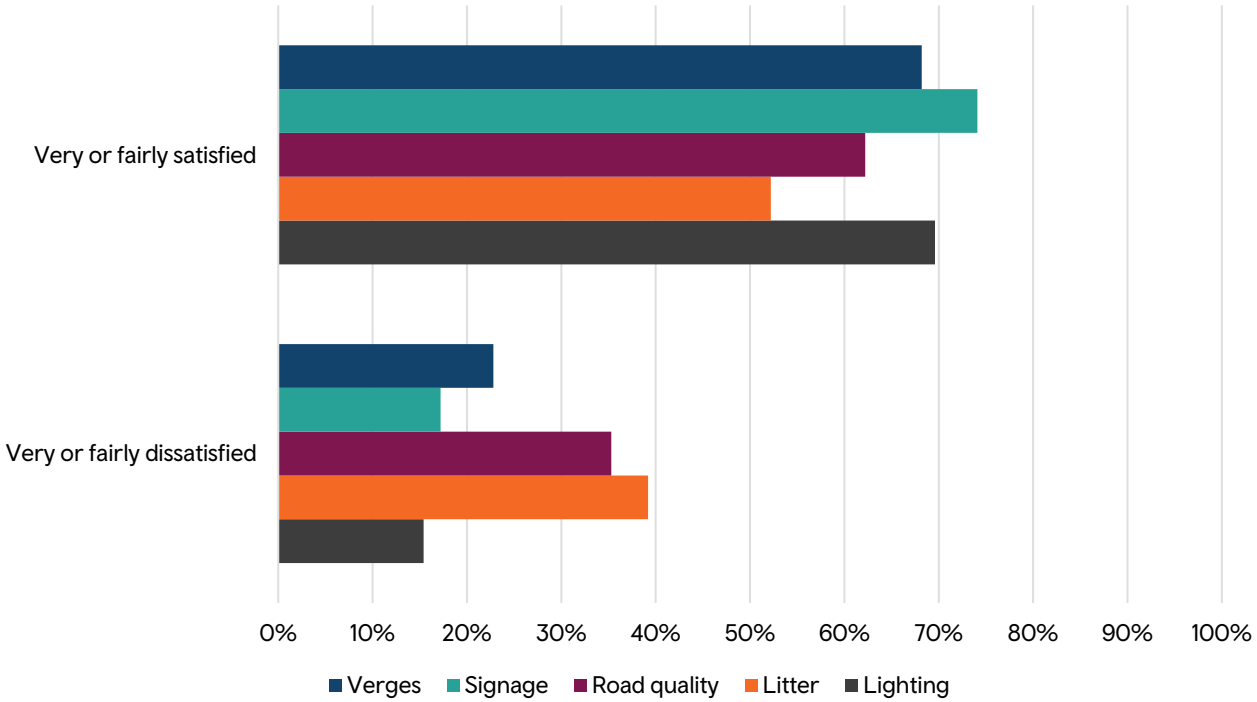
- 74.1% of respondents reported feeling satisfied with signage compared to 17.2% who reported feeling dissatisfied.

Satisfaction with verges

- 68.2% of respondents reported feeling satisfied with verges and 22.8% reported feeling dissatisfied.

Satisfaction with lighting, litter, road quality, signage and verges

Figure 6: Percentage of respondents satisfied and dissatisfied with lighting, litter, road quality, signage and verges, Wales, 2025/26



Description of Figure 6: A horizontal bar chart showing over half of respondents were satisfied with lighting, litter, signage and verges. A higher proportion of respondents were satisfied with signage at 74.1%, followed by lighting (69.6%) and verges (68.2%). Only 35.3% of respondents were satisfied with road quality.

Source: Wales National Travel Survey, mode specific satisfaction: car

Satisfaction with traffic management during congestion

- 52.3% of respondents reported feeling satisfied with traffic management during congestion. 31.9% reported feeling dissatisfied.

Satisfaction with traffic management during incidents, such as collisions or breakdowns

- 42.8% of respondents reported feeling satisfied with traffic management during incidents, such as collisions or breakdowns. 20.9% of respondents reported feeling dissatisfied.

Satisfaction with traffic management during severe weather

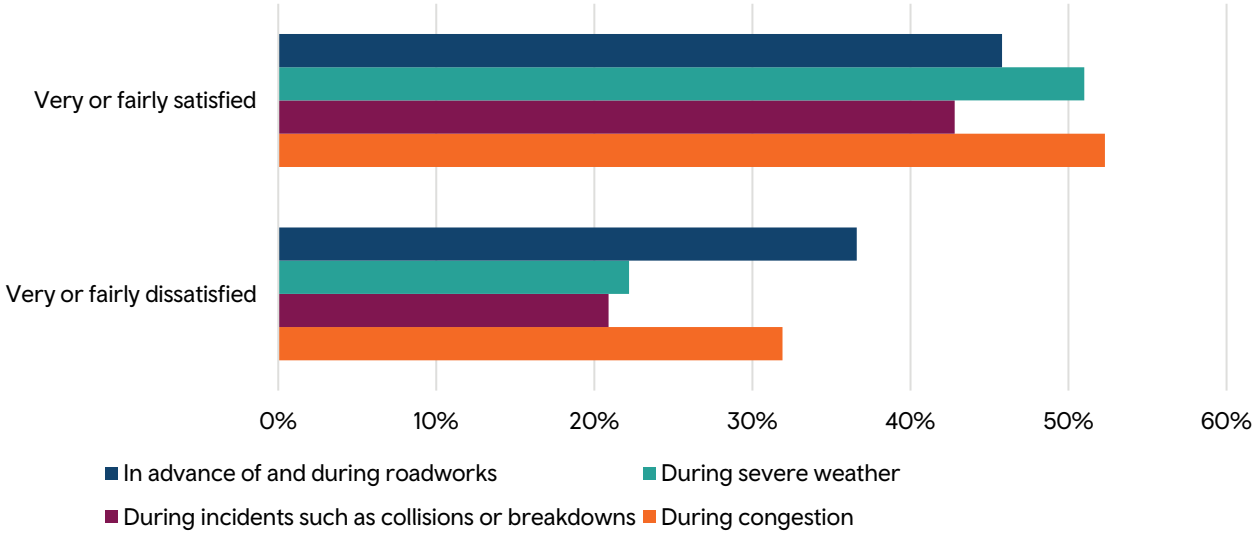
- 51.0% of respondents reported feeling satisfied with traffic management during severe weather. 22.2% reported feeling dissatisfied.

Satisfaction with traffic management in advance of and during roadworks

- 45.8% of respondents were satisfied with traffic management in advance of and during roadworks. 36.6% of respondents were dissatisfied.

Satisfaction with traffic management

Figure 7: Percentage of respondents satisfied and dissatisfied during congestion, incidents such as collisions or breakdowns, severe weather and in advance of and during roadworks, Wales, 2025/26



Description of Figure 7: A horizontal bar chart showing about half of respondents were satisfied during congestion and severe weather. Less than half were satisfied during incidents such as collisions or breakdowns and in advance of and during roadworks.

Source: Wales National Travel Survey, mode specific satisfaction: car

Reasons why respondents chose to travel by car

We asked respondents who travelled by car at least once every couple of months (89.9% of respondents) why they chose to travel by car.

- Almost half (49.7%) of respondents chose to travel by car because it was the "most direct route".
- 38.8% selected "I felt it would be more reliable" and 33.1% because it was the "cheapest option".

Sex of the respondent

- The same responses were the most commonly selected reasons for male and female respondents. However, a higher proportion of male respondents selected "most direct route" (52.8%) and "cheapest option" (37.7%) than female respondents (47.4% and 28.7%).

Disabled status

- The top three reasons why both disabled and non-disabled respondents travelled by car did not differ. "Most direct route" was the most popular (53.0% non-disabled and 42.7% disabled respondents), followed by "I felt it would be more reliable" (41.2% and 31.9% respectively) and "cheapest option" (34.8% and 28.5% respectively).

Regions

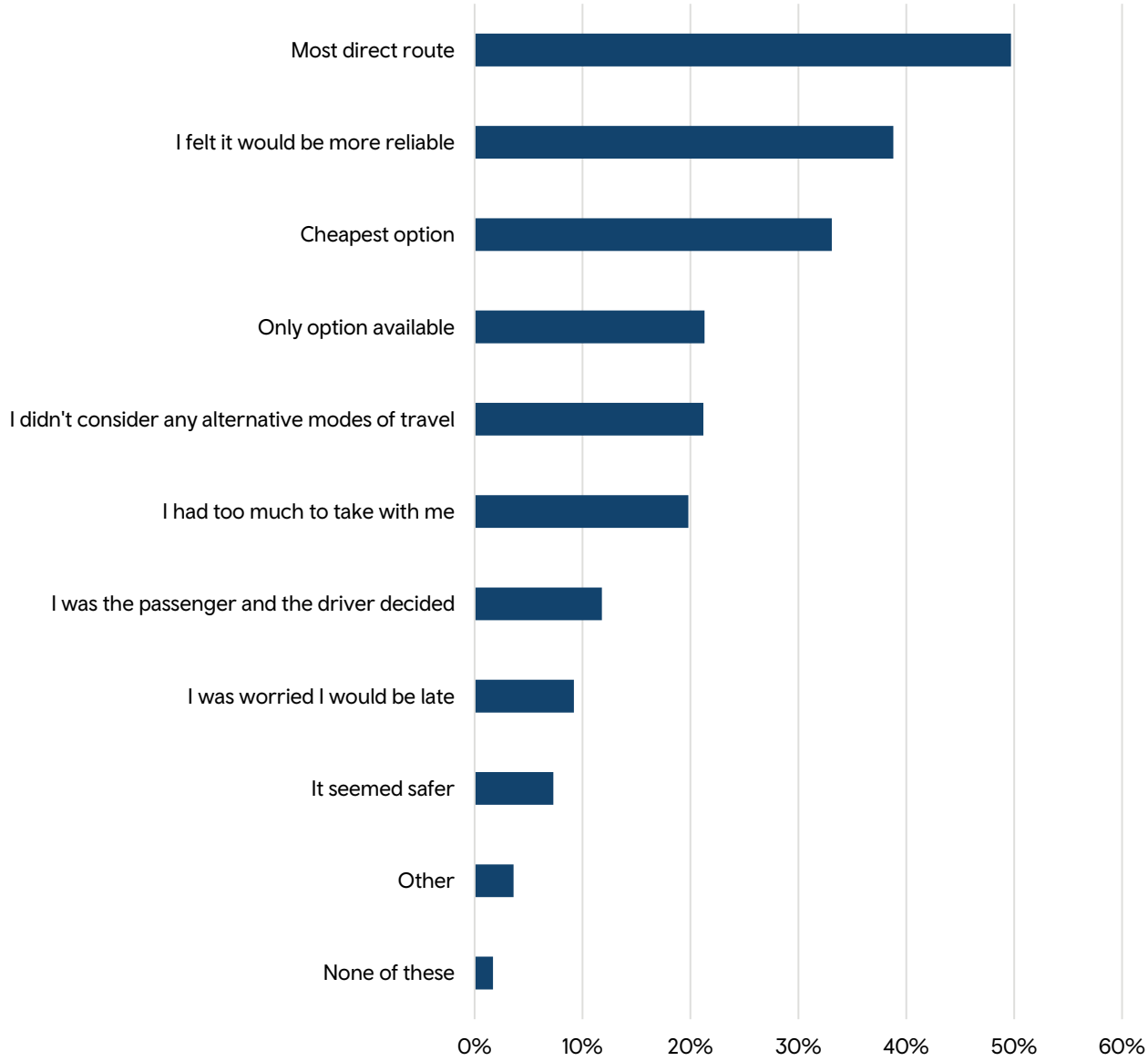
- "Most direct route" was the most common factor across all regions from 51.4% in South East Wales, followed by 50.6% in South West Wales, 46.6% in North Wales and 45.3% in Mid Wales.
- "I felt it would be more reliable" was also a common reason selected across the regions from 44.0% in South West Wales followed by South East Wales (39.1%), North Wales (35.2%) and Mid Wales (31.5%).
- The third most common reason in South West Wales (36.7%), South East Wales (33.0%) and North Wales (31.7%) was "cheapest option". However, in Mid Wales 43.4% of respondents selected "only option available".

Age group

- "Most direct route" was a top reason selected in all age groups, however the proportion of respondents selecting it decreases as age group increases, from 53.6% of those aged 25-34 to 30.0% of those aged 85 or above.
- For respondents in age groups between 16-24 and 65-74, "I felt it would be more reliable" was also a commonly selected reason. It also decreased as age group increased from 49.4% of those aged 25-34 to 31.9% of those aged 65-74.
- "Cheapest option" was a commonly selected reason for respondents in age groups between 16-24 and 55-64. "I didn't consider any alternative modes of travel" was commonly selected from respondents in age groups between 65-74 and 85 or above, and this increased from 26.8% to 37.6%.
- 28.8% of respondents aged 75-84 selected "only option available" and 30.9% of respondents aged 85 or above selected "I was the passenger and the driver decided".

Reasons why respondents chose to travel by car

Figure 8: Reasons for choosing to travel by car, Wales, 2025/26



Description of Figure 8: 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.