



Llywodraeth Cymru  
Welsh Government



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STATISTICS, DOCUMENT

# Transport (National Survey for Wales): April 2022 to March 2023

The report provides information on transport usage and behaviours within the 12 months for April 2022 to March 2023.

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## Introduction

In 2022-23, the National Survey included questions on transport. Questions were included on car usage, satisfaction with bus and train services and distance travelled to work. The survey covers people aged 16 or over.

## Main findings

- 88% of people had access to a car. However, there were differences between age, ethnicity, household type, health, tenure, deprivation, economic activity and area.
- 12% of people use a bus at least once a week. Around two thirds of people who used the bus were satisfied with bus services. Overall, including those who didn't use buses, just over half of people were satisfied with bus services.
- 4% of people used the trains at least once a week. Overall, 55% of people were very satisfied or fairly satisfied with train services.
- The most common way to get to work was car or van, used by 75% of people in work. 14% walked to work and 4% of people cycled to work.
- Overall, 51% of working people travelled between 3 and 15 miles to work, and a further 26% travelled more than 15 miles.

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## Car use

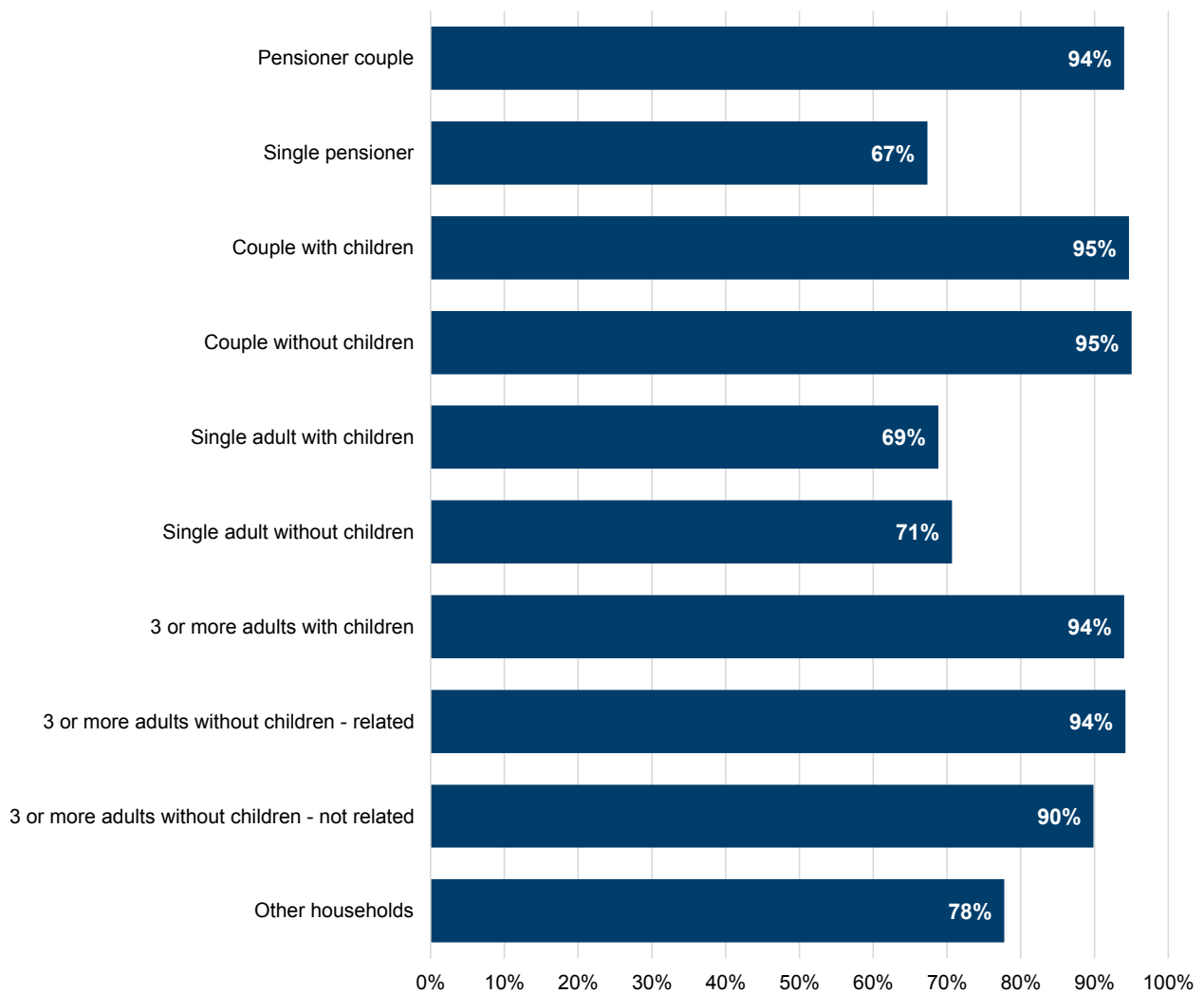
The National Survey asked if there was a car or van normally available for use by anyone in the household. This could include cars shared with someone else or provided by work, that are also available for private use. 88% of people had a car available for use. Controlling for other factors (explained in our [Regression technical report](https://www.gov.wales/national-survey-wales-technical-information) (<https://www.gov.wales/national-survey-wales-technical-information>)), the following characteristics were each associated with car use.

People aged 45 to 64 were most likely to have a car available, with 93% of that age group having access. 87% of those aged 16 to 44 and 85% of those aged 65 or more had a car available.

There was also a difference by ethnicity, where 89% of people with a White background (Welsh, English, Scottish or Northern Irish) had a car available, compared with 72% of those with a Black, Asian or Minority Ethnic background.

Access to a car also varied by household type, as shown in Figure 1.

# Figure 1: Percentage of people with use of a car, by household type



Description of Figure 1: This bar chart shows that people in single-adult

households were less likely to have access to a car, with 67% of single pensioners, 69% of single adults with children and 71% of single adults without children having access to a car. All other types of household, except “Other”, had car access rates of at least 90%.

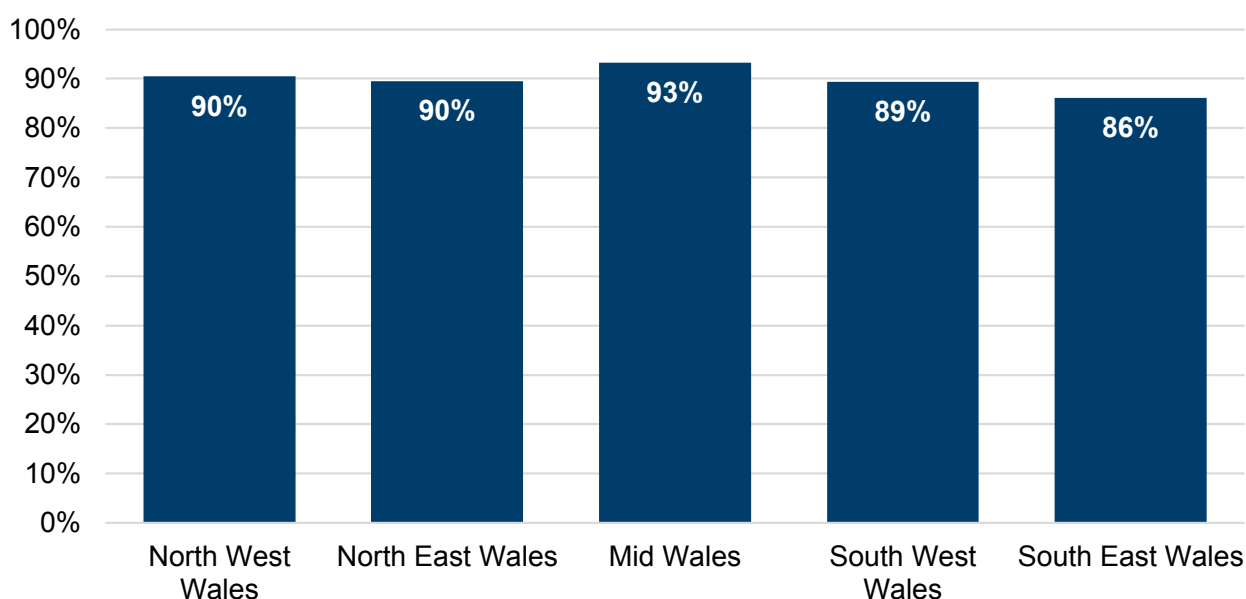
People reporting that they were in better general health (people in good or very good health) were more likely to have a car available. 91% of those in good general health had a car available, whilst 75% of those in bad general health (people in bad or very bad health) had a car available.

95% of owner-occupiers had access to a car, compared with 76% of those in privately rented accommodation and 64% in social housing.

91% of those not in material deprivation had a car available, compared with 72% of those in material deprivation.

For those in employment, 94% had access to a car whereas 82% of economically inactive and 61% of unemployed had access to a car.

**Figure 2: Percentage of people with access to a car, by region**



Description of Figure 2: This bar chart shows the differences between the regions of Wales in the percentage of those with access to a car, with 93% in Mid Wales having access to a car and 86% in South East Wales having car access.

As might be expected, there was also a difference between urban and rural areas, with 94% of those in rural areas having access to a car compared with 85% in urban areas.

The National Survey also asked people whether they gave their time for free (that is, 'volunteered') for any clubs or organisations. People who volunteer were

more likely to have vehicle access. 93% of volunteers had access to a car or van, compared with 87% of non-volunteers.

## Bus satisfaction and usage

When considering bus satisfaction rates and usage it should be noted that people living in Wales can get free bus travel when they are aged over 60.

12% of people use a bus at least once a week. As might be expected, there is a difference between those who have access to a car and those who don't, 39% of those who don't have the use of a car, use the bus at least once a week, compared with 9% of those who do have use of a car.

There are differences in bus usage by ethnicity too, with 23% of people of a Black, Asian or Minority Ethnic background using the bus at least once a week, compared with 12% of people with a White background.

Furthermore, 24% of unemployed people and 17% of economically inactive people use the bus at least once a week, compared with 8% of those in employment. Bus usage is also associated with tenure, with 26% of those in social housing using the bus at least once a week, compared with 16% of those in private rented accommodation, and 9% of owner-occupiers.

Bus usage is also associated with marital status, 8% of those who are married or in a civil partnership use the bus at least once a week. This is lower than the other groups, where between 16% and 18% use the bus at this frequency.

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There is also a difference between urban and rural areas in bus usage, with 9% of people in rural areas using the bus at least once a week compared with 14% in urban areas.

There are differences by region and age in bus usage, however after controlling for other factors, the relationships disappear – this suggests the differences are explained by factors other than age and the region someone lives in. 9% of those aged between 45 and 64 used the bus at least once a week compared with 14% of those aged 65 or more and 13% of those aged 16 to 44. Additionally, 13% of those living in North West Wales and 14% in South East Wales used the bus at least once a week compared with 7% in Mid Wales.

In looking at bus satisfaction rates, all people were asked if they were satisfied with bus services, including those who did not use buses.

Around two thirds of people who used the bus at least some of the time were satisfied with bus services. 65% of those who use the bus at least once a week are either very satisfied or fairly satisfied. Those who used buses at least once a year, but less than once a week were satisfied in 69% of cases. Those who didn't use buses at all were less likely to be satisfied with them, 38% satisfied.

Overall, including those who didn't use buses, 52% of people (aged 16+) were satisfied with bus services and 23% were dissatisfied.

60% of those aged 65 or more were satisfied with bus services, while those aged 16 to 44 and those aged 45 to 64 both had satisfaction rates around 50%.

People in good health (those who said their health was good or very good) were

more likely to be satisfied with bus services, with 54% of these being satisfied. On the other hand, 43% of those in bad health (those who said their health was bad or very bad) were satisfied.

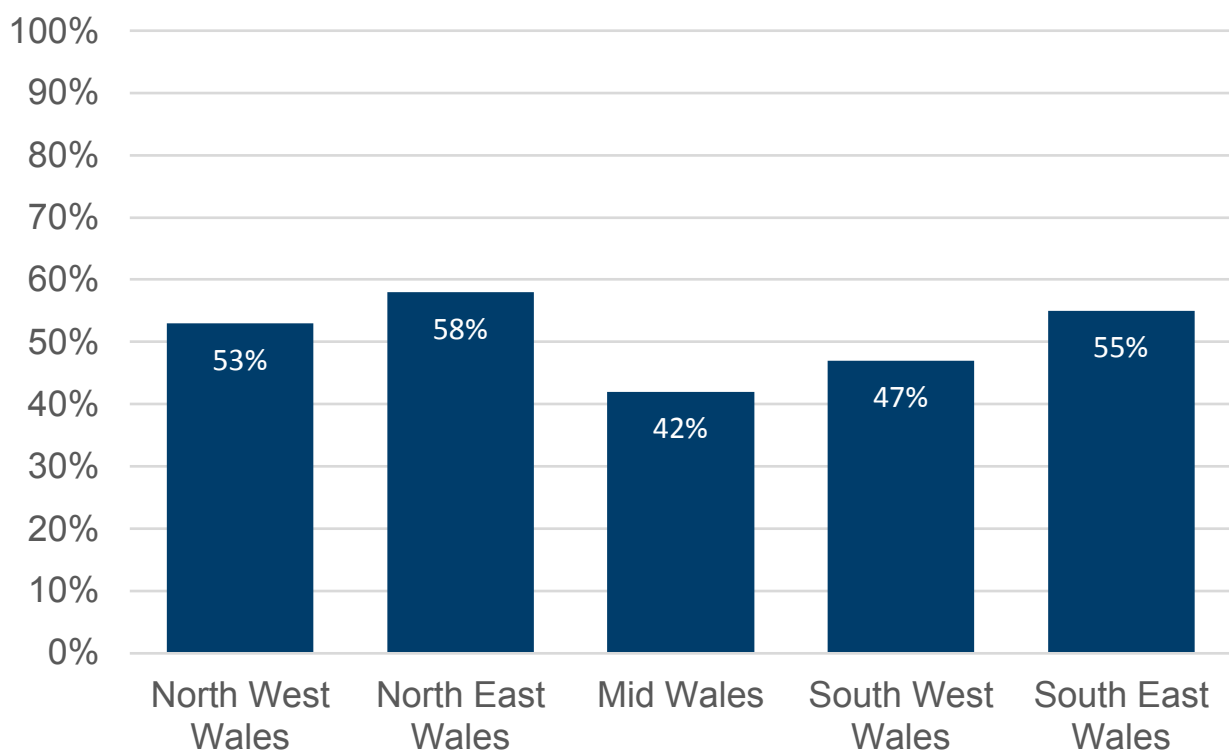
Those who were economically inactive were also more likely to be satisfied with bus services than those who were in employment, 57% compared with 48% respectively.

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**Figure 3: Percentage of people that were very satisfied or fairly satisfied with bus services, by region**

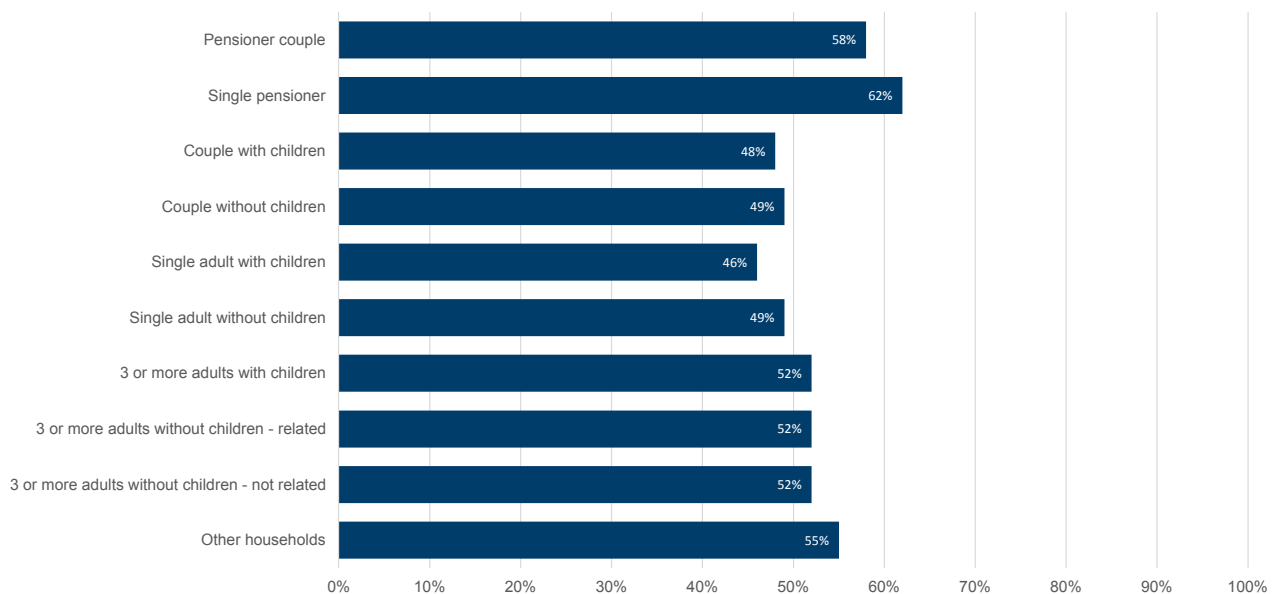


Description of Figure 3: This bar chart shows the differences in satisfaction with bus services by where people lived. The highest satisfaction rate was people in North East Wales (58% satisfied) and the lowest rates were in South West Wales (47%) and Mid Wales (42%).

The percentage who were satisfied with bus services was higher among people living in urban areas than rural areas, with 56% and 44% respectively being

satisfied. More bus services run in urban areas than rural areas, which may be the reason for this.

**Figure 4: Percentage of people who were very satisfied or fairly satisfied with bus services, by household type**



Description of Figure 4: This bar chart shows that pensioner households were more likely to be satisfied with bus services, with 58% of pensioner couples and 62% of single households being satisfied. Households with 3 or more adults were also more likely to be satisfied with bus services than households with fewer than 3 adults.

## Train satisfaction and usage

4% of people used the trains at least once a week.

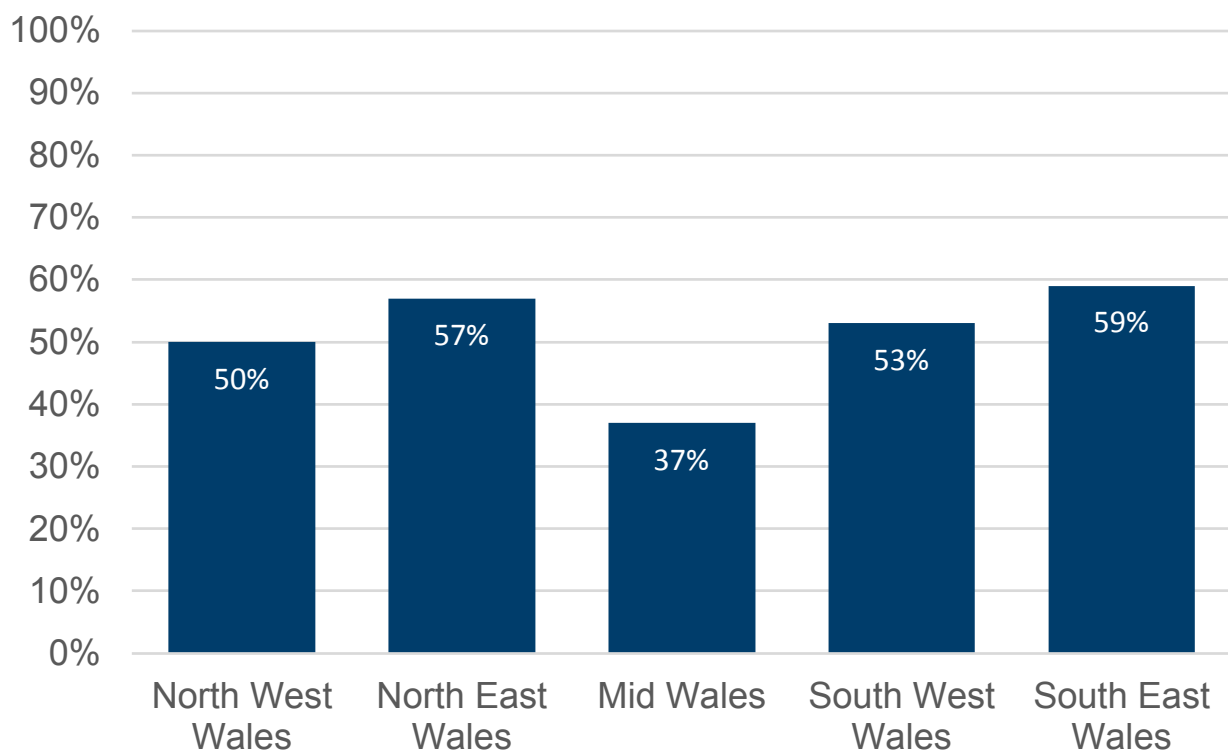
However, there are some differences between age groups, with 6% of those aged 16 to 44 years using train services at least once a week, compared with 3% of those aged 45 to 64 and 1% of those aged 65 or more.

Additionally, 3% of owner-occupiers use train services at least once a week, compared with 6% of those in private rented accommodation and 5% of those in social housing.

Because of the small numbers, it is difficult to carry out further analysis that isolates the specific effects of particular factors (such as age, ethnicity, etc.) while also controlling for other factors.

Overall, 55% of people were very satisfied or fairly satisfied with train services and 18% were dissatisfied.

**Figure 5: Percentage of people that were very satisfied or fairly satisfied with train services, by region**



Description of Figure 5: This bar chart shows the differences between regions in rates of satisfaction with train services. The highest satisfaction rates were among people living in South East Wales (59%) and North East Wales (57%) and the lowest rate was in Mid Wales (36%).

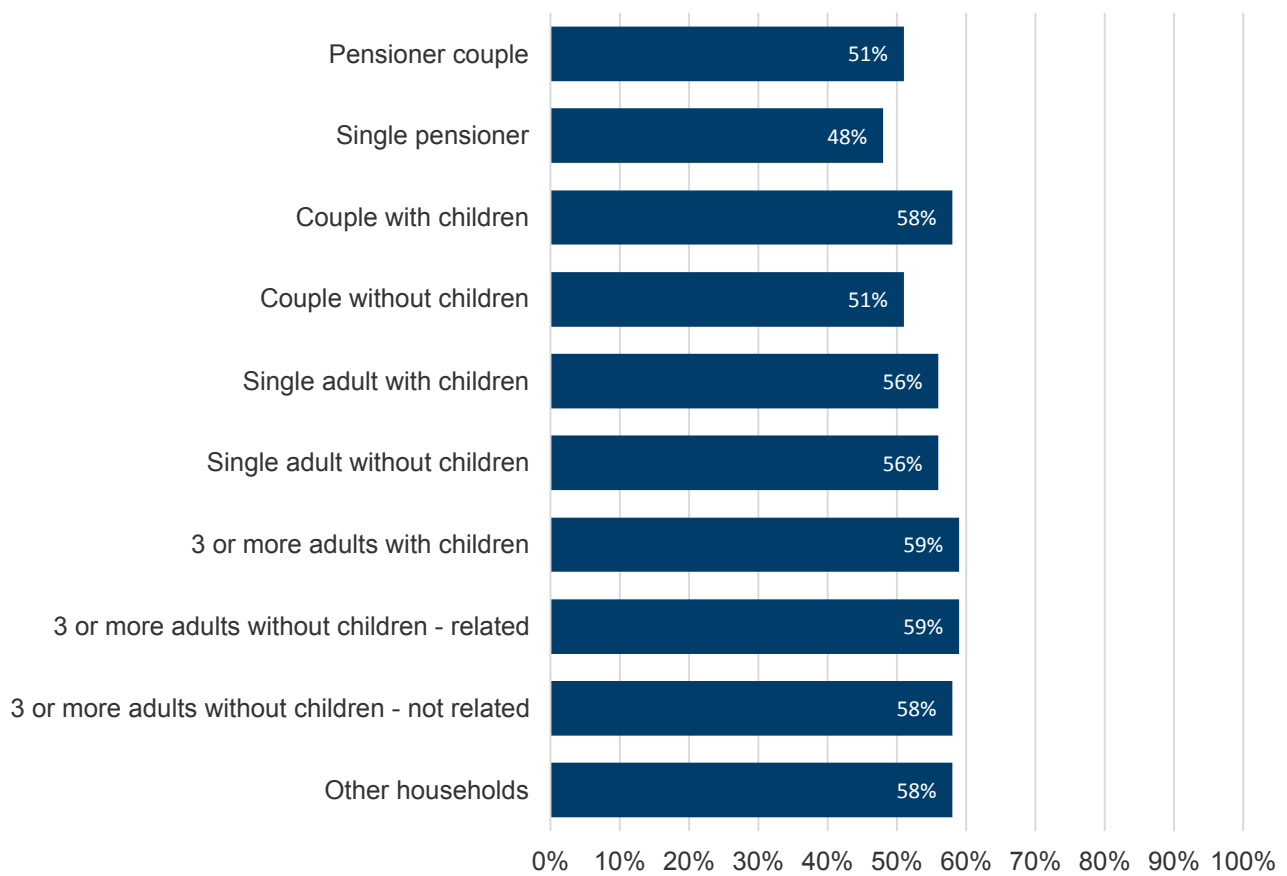
The percentage of people who were satisfied with train services was higher in urban areas (59%) than rural areas (48%). There are more train services in

urban areas than rural areas, so this may be the reason. Of people who have train services 61% of those in urban areas were satisfied compared with 57% in rural areas. Similarly for the regions, of people who have train services, the difference between the highest satisfaction rates (South East Wales and North East Wales) and the lowest (Mid Wales) is smaller when focusing only on the people who report they have train services in their area, 62% and 51% respectively.

Considering all people again (whether they have train services or not), satisfaction rates are similar for people in employment and people who are unemployed or economically inactive, however there is a difference in the dissatisfaction rates i.e. those very dissatisfied or fairly dissatisfied. Of those in employment, 20% are dissatisfied compared with 14% for people who are economically inactive.

People in bad or very bad health were less likely to be satisfied with train services (46%) than those in good or very good health (57%).

**Figure 6: Percentage of people that were very satisfied or fairly satisfied with train services, by household type**



Description of Figure 6: This bar chart shows that people in pensioner households were less likely to be satisfied with train services, with satisfaction rates around 50%. Households with 3 or more adults in them were generally



more likely to be satisfied, with satisfaction rates around 58% or 59%.

## Mode of travel to work

The National Survey asked about the usual modes of travel to work, which people used at least some of the time. The most-used travel to work mode was car or van, used by 75% of people in work. 14% of working people walked to work.

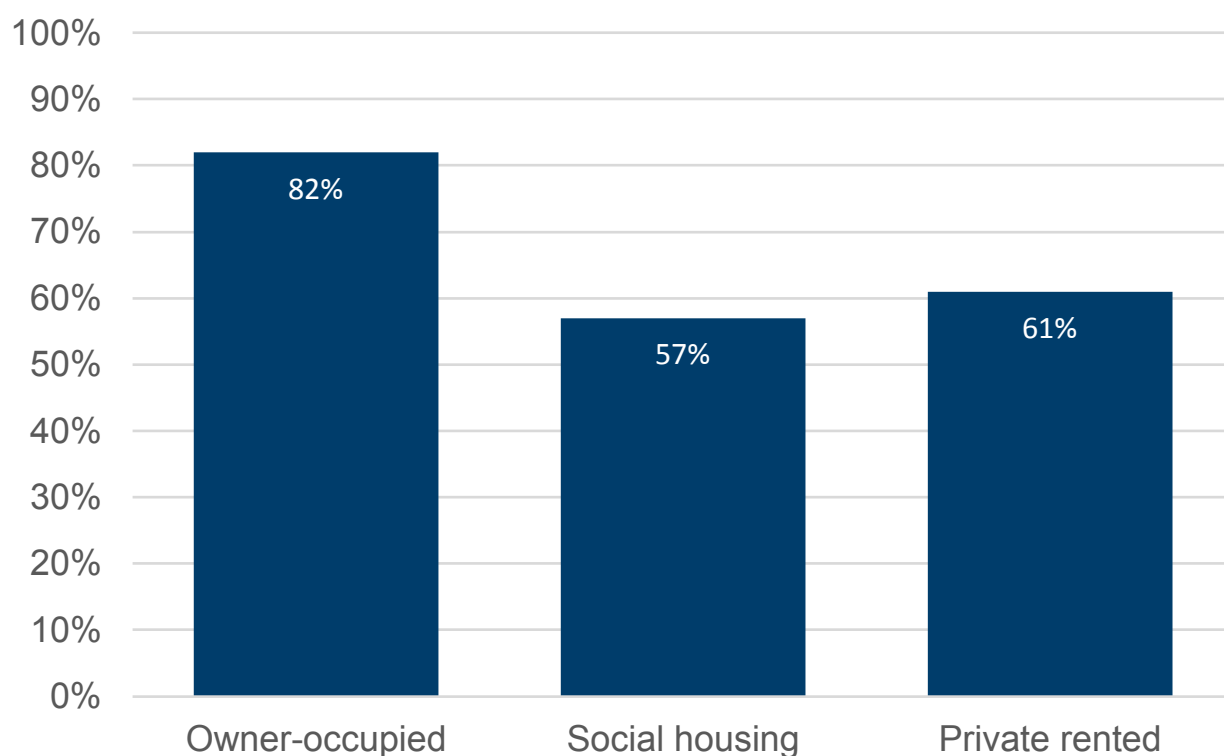
4% of people cycled to work, but the numbers were too low to explore in the same way as for other modes (i.e. identifying key factors while controlling for other factors).

Of all the different modes, further analysis was possible only for people who either travelled to work by car or walked (groups using the other modes of transport were too small to break down further).

Travel by car was associated with age, ethnicity, religion, marital status and tenure, when controlling for other factors. Walking to work was associated with age, ethnicity, religion, tenure and using Welsh in everyday life, again when controlling for other factors. These findings are explored in more detail in the rest of this section.

83% of people aged 45 to 64 travelled to work by car compared with 71% of those aged 16 to 44. 78% of those of white ethnicity travelled to work by car, compared with 49% of those of black, Asian or minority ethnic origin.

**Figure 7: Percentage of people who travelled to work by car, by tenure**



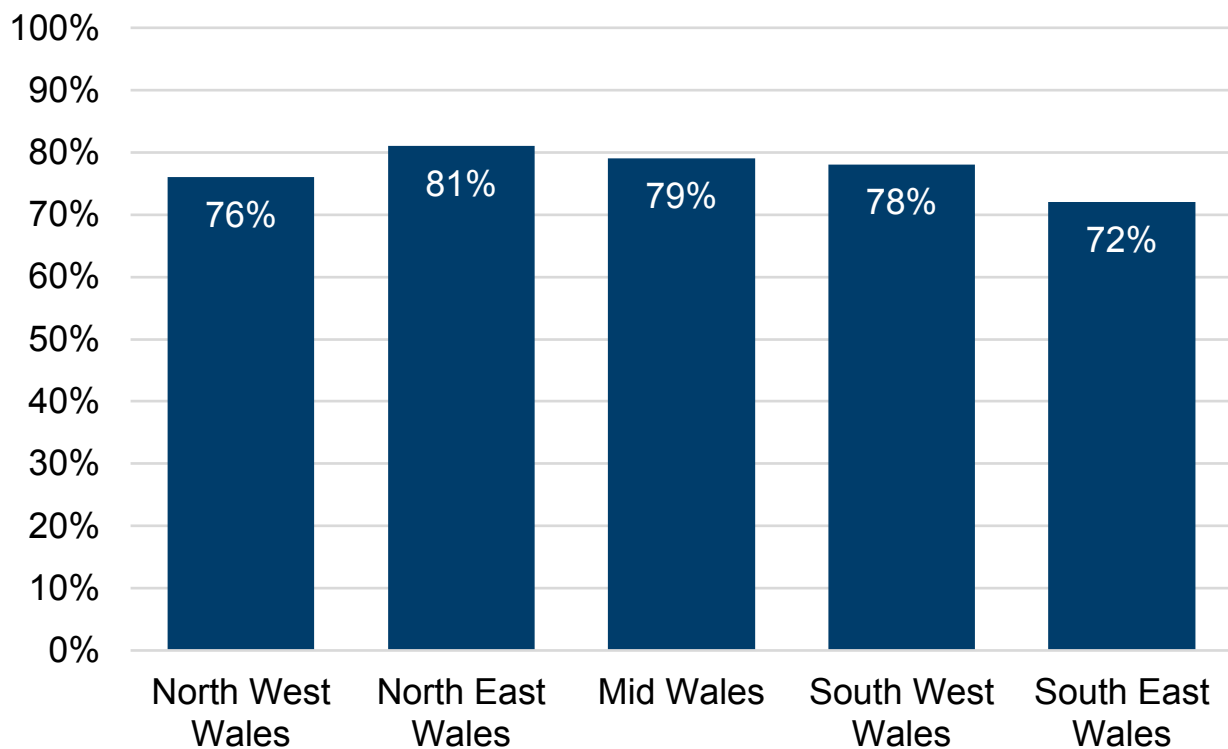
Description of Figure 7: This bar chart shows the percentage of people who travelled to work, by tenure. 82% of owner-occupiers travelled to work by car compared with 61% of those in private rented accommodation and 57% in social housing.

Single people were less likely to travel to work by car, with 67% of them doing so. On the other hand, 83% of those who were married or in a civil partnership

travelled to work by car.

There are differences by region in travel to work by car. Once other factors are controlled for, the relationship disappears – this suggests the differences are explained by factors other than which region someone lives in.

**Figure 8: Percentage of people who travelled to work by car, by region**



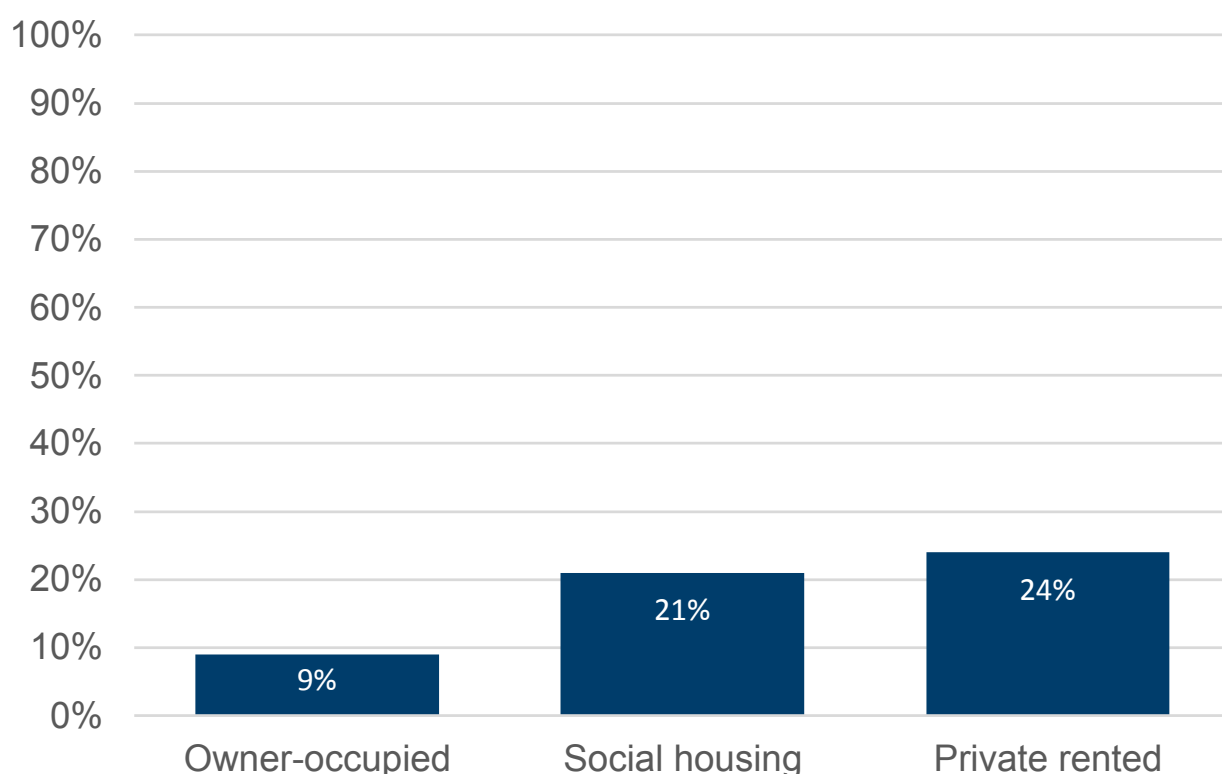
Description of Figure 8: This shows that South East Wales had the lowest

proportion of people who travelled to work by car, at 72%, whereas the highest proportion was in North East Wales at 81%.

For those who walked to work, there was a difference by age. 15% of those aged 16 to 44 walked to work compared with 10% of those aged 45 to 64. There was also a marked difference by ethnicity, with 12% of people of white origin walking to work, compared with 26% of those from a black, Asian or minority ethnic background.

As with car mode, tenure was also associated with walking to work, see Figure 9.

**Figure 9: Percentage of people who walked to work, by tenure**



Description of Figure 9: This shows that 9% of owner occupiers walked to work compared with 21% of those in social housing and 24% in private rented housing.

People who said they used Welsh in their everyday life were less likely to walk to work, with 7% of these walking to work compared with 14% who said they didn't use Welsh. This may well be related to the areas where Welsh is spoken

regularly, although rurality and region didn't show as having an association. However, 15% of people in urban areas walked to work and 9% in rural areas walked to work. By region, 10% of people walked to work in North West Wales, the lowest percentage, compared with 16% in North East Wales, the highest percentage.

## Distance travelled

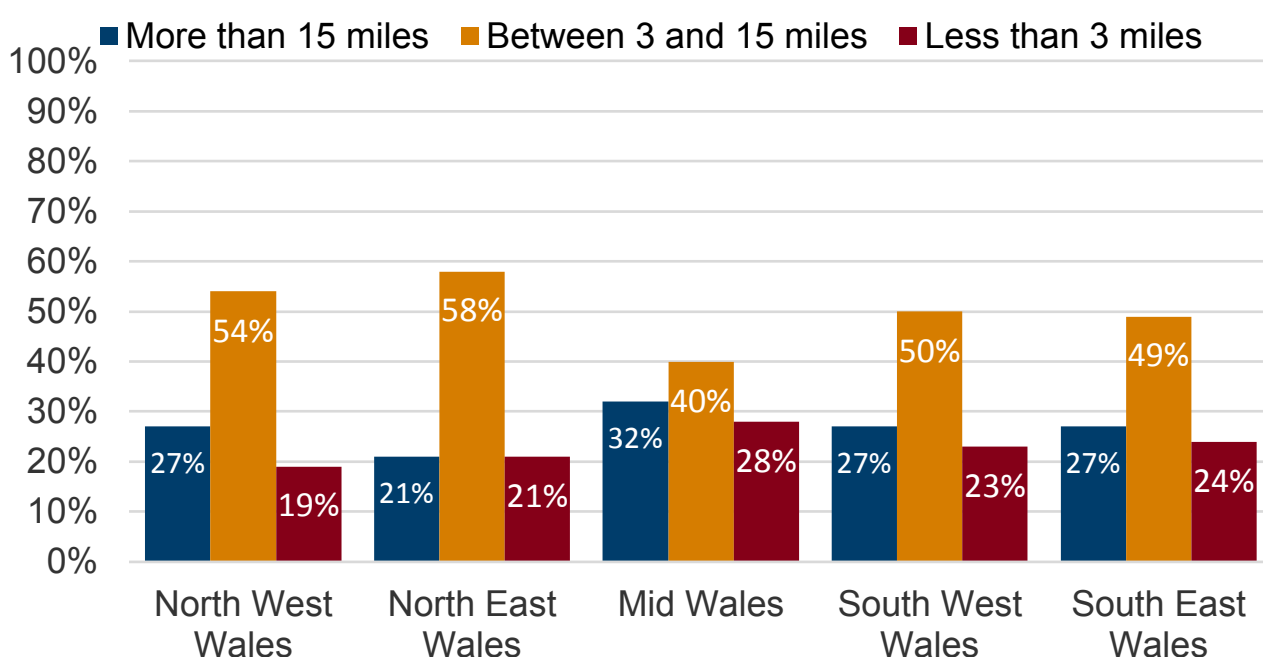
Overall, 51% of working people (excluding homeworkers) travelled between 3 and 15 miles to work and a further 26% travelled more than 15 miles.

The factors that showed significant differences were sex, marital status, health, tenure, region and whether someone lived in an urban or rural location. Life satisfaction was not found to have a link with distance travelled, once other factors were controlled for. There was a difference by sex, with 32% of males travelling more than 15 miles compared with 22% for females.

Owner-occupiers also travelled further to work, with 81% of them travelling more than 3 miles. This compared with 70% for private renters and 64% for those in social housing.

It was also probably not surprising that people in rural areas travelled further, with 32% travelling more than 15 miles, compared with 24% in urban areas.

**Figure 10: Percentage of people who travelled large distances to work by region**



Description of Figure 10: This bar chart shows the percentage of people who travelled large distances to work by region. Those in North East Wales (58%) and North West Wales (54%) were most likely to travel between 3 and 15 miles to work, and those in Mid Wales were the least likely (40%). However, those in Mid Wales were more likely to travel the furthest distances of more than 15 miles (32%) and those in North East Wales the least likely (21%).

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Although they were not significant there were also some differences that were worth noting.

People of white ethnic origin were likely to travel further to work, with 77% travelling more than 3 miles, whereas 70% of people of black, Asian or minority ethnic origin travelling that distance.

People who were in material deprivation were less likely to travel more than 15 miles, with 21% of them travelling more than 15 miles, compared with 27% of those not in material deprivation.

## Policy context

Welsh Government actions on transport and digital infrastructure are designed to change how people travel, promoting more environmentally-friendly transport as a response to the climate and nature emergency.

Achieving modal shift and carbon reduction are the core aims and targets in **Llwybr Newydd – the Wales Transport Strategy** (<https://www.gov.wales/llwybr-newydd-wales-transport-strategy-2021>). Launched in March 2021, it is designed to shape the transport system in Wales over the next 20 years. The intention is for Welsh Government and its partners to prioritise people and reduce climate impacts when making policy decisions about the transport system.

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## Quality information

The 2022-23 **National Survey for Wales** (<https://www.gov.wales/national-survey-wales>) was a continuous, large-scale, random sample survey covering people across Wales. Addresses were randomly selected, and invitations sent by post, requesting that a phone number be provided for the address. The phone number was able to be provided via an online portal, a telephone enquiry line, or direct to the mobile number of the interviewer for that case. If no phone number was provided, an interviewer was able to call at the address and ask for a phone number. Once a phone number was obtained, the interviewer used a random selection method to choose one adult at the address to take part in the survey. The first section of the survey took place by telephone interview; the second section took place online (unless the respondent was unwilling or unable to complete it online, in which case these questions were also asked by telephone).

Detailed charts and tables of results are available in our interactive **results viewer** (<https://www.gov.wales/national-survey-wales-results-viewer>). For information on data collection and methodology please see our **Quality report** (<https://www.gov.wales/national-survey-wales-technical-information>) and **Technical report** (<https://www.gov.wales/national-survey-wales-technical-information>).

## Official statistics status

All official statistics should show the standards of the **Code of Practice for Statistics (UK Statistics Authority)** (<https://code.statisticsauthority.gov.uk/>).

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These are accredited official statistics. They were independently reviewed by the Office for Statistics Regulation (OSR) in June 2020. They comply with the standards of trustworthiness, quality and value in the Code of Practice for Statistics.

It is Welsh Government's responsibility to maintain compliance with the standards expected of accreditation. If we become concerned about whether these statistics are still meeting the appropriate standards, we will discuss any concerns with OSR promptly. Accreditation can be cancelled or suspended at any point when the highest standards are not maintained, and reinstated when standards are restored.

Accredited official statistics are called National Statistics in the Statistics and Registration Service Act 2007.

## **Statement of compliance with the Code of Practice for Statistics**

Our statistical practice is regulated by the OSR. OSR sets the standards of trustworthiness, quality and value in the Code of Practice for Statistics that all producers of official statistics should adhere to.

All of our statistics are produced and published in accordance with a number of statements and protocols to enhance trustworthiness, quality and value. These are set out in the Welsh Government's **Statement of Compliance** (<https://www.gov.wales/about-statistics-and-research#Statementofcompliance>).

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These **accredited official statistics (OSR)** (<https://osr.statisticsauthority.gov.uk/policies/official-statistics-policies/accredited-official-statistics-policy/>) demonstrate the standards expected around trustworthiness, quality and public value in the following ways.

You are welcome to contact us directly with any comments about how we meet these standards. Alternatively, you can contact OSR by emailing [regulation@statistics.gov.uk](mailto:regulation@statistics.gov.uk) (<https://www.gov.walesmailto:regulation@statistics.gov.uk>) or via the OSR website.

## Well-being of Future Generations Act (WFG)

(<https://www.gov.walesnull>)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural wellbeing of Wales. The Act puts in place seven wellbeing goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the wellbeing goals, and (b) lay a copy of the national indicators before the Senedd Cymru. These national indicators were laid before the Senedd in 2021. The indicators laid on 14 December 2021 replace the set laid on 16 March 2016.

Information on the indicators, along with narratives for each of the wellbeing goals and associated technical information is available in the **Wellbeing of Wales report** (<https://www.gov.wales/wellbeing-wales>).

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Further information on the **Well-being of Future Generations (Wales) Act 2015** (<https://www.gov.wales/well-being-future-generations-wales-act-2015-guidance>).

The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local wellbeing assessments and local wellbeing plans.

## Contact details

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