



Ministry of Infrastructure and
Water Management

Netherlands Mobility Panel 2025: Current insights and long- term trends

**KiM Netherlands Institute for
Transport Policy Analyses**



Introduction

In this publication, we present insights based on the most recent annual survey of the Netherlands Mobility Panel (MPN). These insights relate to the ownership and use of modes of transport, perceptions of mobility and accessibility, and work-and education-related mobility¹. The data was collected in the autumn of 2025 (mid-September to mid-November). We compare the findings (as far as possible) with the previous surveys conducted with the MPN and, in some cases, break them down into relevant subgroups. In doing so, we weight the MPN data by gender, age, educational attainment, employment status, family stage, urbanisation and car ownership to obtain a representative picture of the Dutch population. Due to differences in, amongst other things, the weighting and sample composition, the results of the analyses in this publication may differ slightly from the results of comparable analyses based on other (survey) data covering the same topics.

Reading guide

In this publication, we will discuss the following topics in turn:

- Ownership and use of modes of transport (Theme 1);
- Perceptions of mobility and accessibility (Theme 2);
- Work-related mobility (Theme 3);
- Education-related mobility (Theme 4).

¹In this publication, we do not present national statistics relating to the total volume of mobility in the Netherlands, nor do we provide an overarching picture of accessibility in the Netherlands. For analyses in this area, we refer readers to the [Mobility Report](#) and the [Key Mobility Figures](#), which are published every other year.



About the MPN

Through the Netherlands Mobility Panel (MPN), the Netherlands Institute for Transport Policy Analysis (KiM) collects data on the travel behaviour of a fixed group of people and their households over several years. KiM uses the data for its own research and makes it available to fellow researchers. The MPN provides insights into the factors that influence changes in the travel behaviour of people in the Netherlands. The panel also provides information on the mobility of different groups of people, such as adolescents, families with children or the elderly.

The MPN started in 2013. Since then, the regular annual wave of the MPN has taken place every autumn (from mid-September to mid-November). Respondents aged 12 and over from around 2,000 complete households keep track of their travel behaviour in a travel diary over a period of three days. In this diary, they record not only all their journeys, but also, amongst other things, their mode of transport, who they travelled with, any delays and parking costs. In addition, respondents complete various questionnaires to provide a wealth of background information about themselves and their households. The information from these questionnaires is used for this publication.



Theme 1: Ownership and use of modes of transport

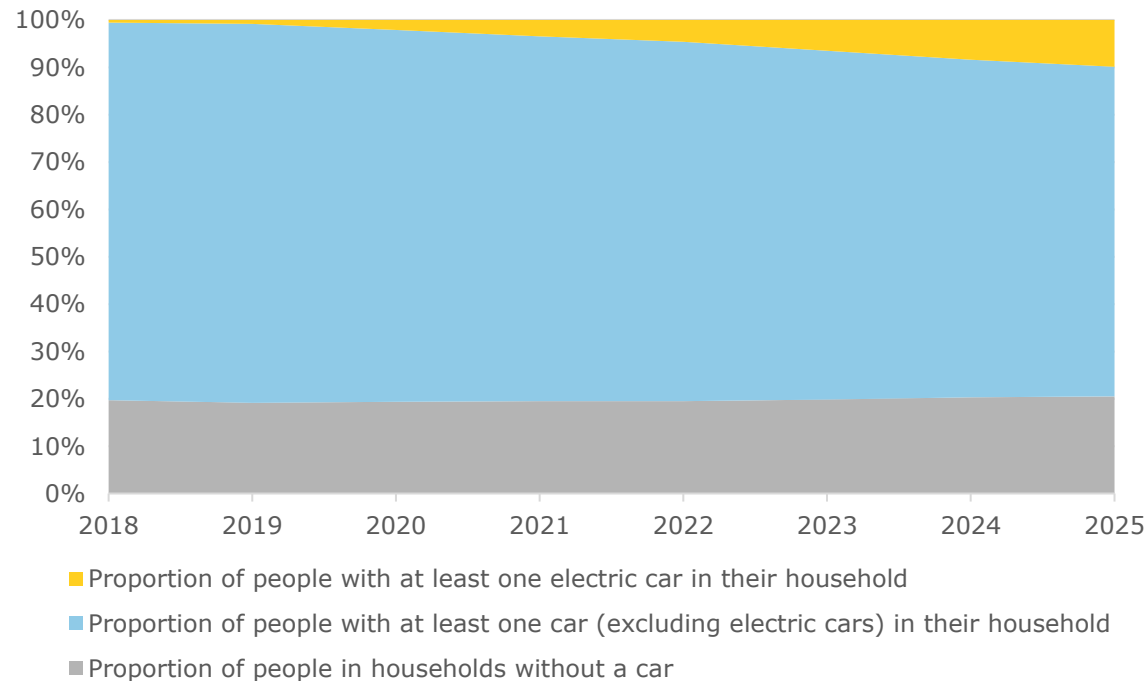
What proportion of the Dutch population owns a car, a bicycle or a specific public transport product? And how often do people say they use different modes of transport in a year? We explore these questions within this theme. We look at all individuals in the MPN. This group is representative of the Dutch population aged 12 and over.

Car ownership

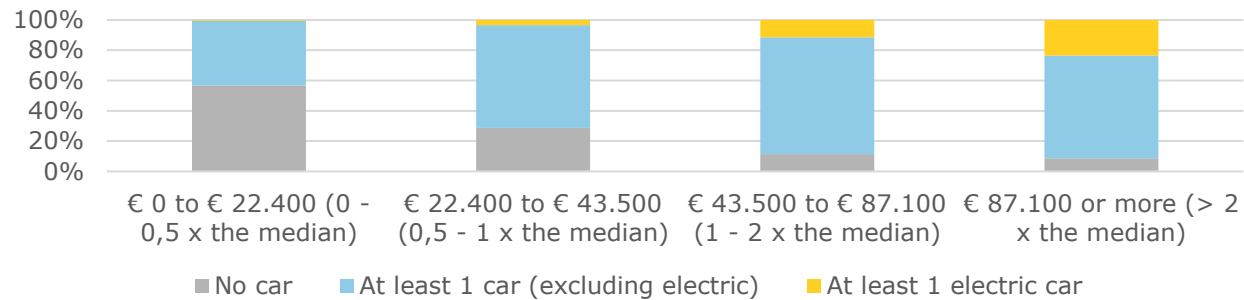


- › The proportion of people without a car in their household in 2025 is 20%, which is roughly the same as in previous years. The proportion of people with an electric car in their household is 10%, which means it has continued the upwards trend from the past years. The remaining 70% of people have at least one car in their household in 2025, but no electric car.
- › Car ownership within households in 2025 is clearly linked to household income². Of those households with incomes of 0 to 0.5 times the median and 0.5 to 1 times the median, 57% and 29% respectively do not own a car. Among those with a household income of more than 2 times the median, 9% do not own a car. The proportion of electric cars also rises with household income, reaching 24% for people with a household income of more than 2 times the median.
- › Car ownership within a household is also linked to the degree of urbanisation of the residential area. In highly urbanised areas, 38% do not own a car, whilst in non-urban areas this figure is around 7%.

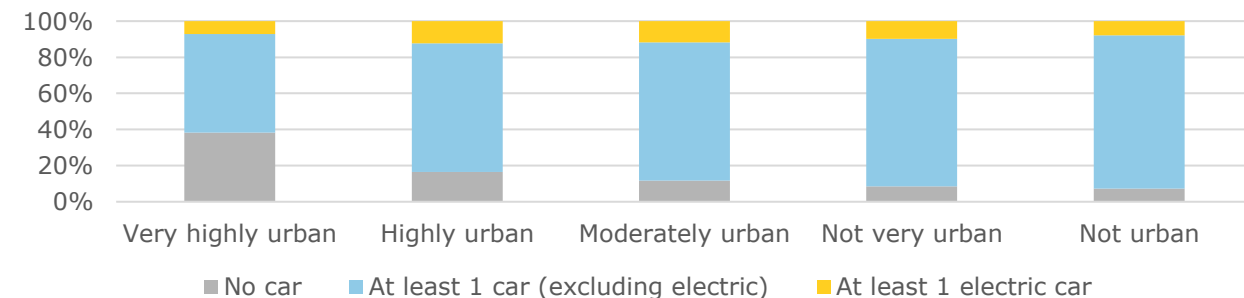
Car ownership in household



Car ownership in household by household income



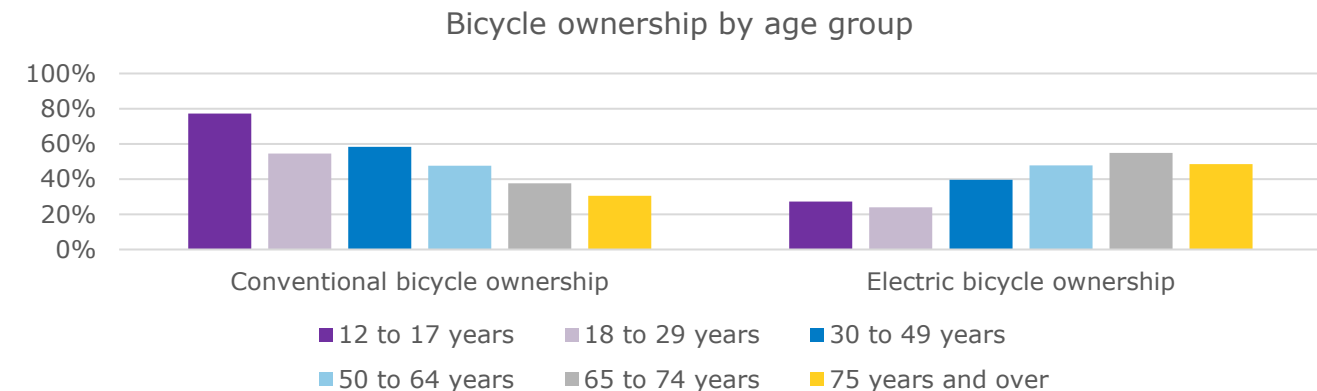
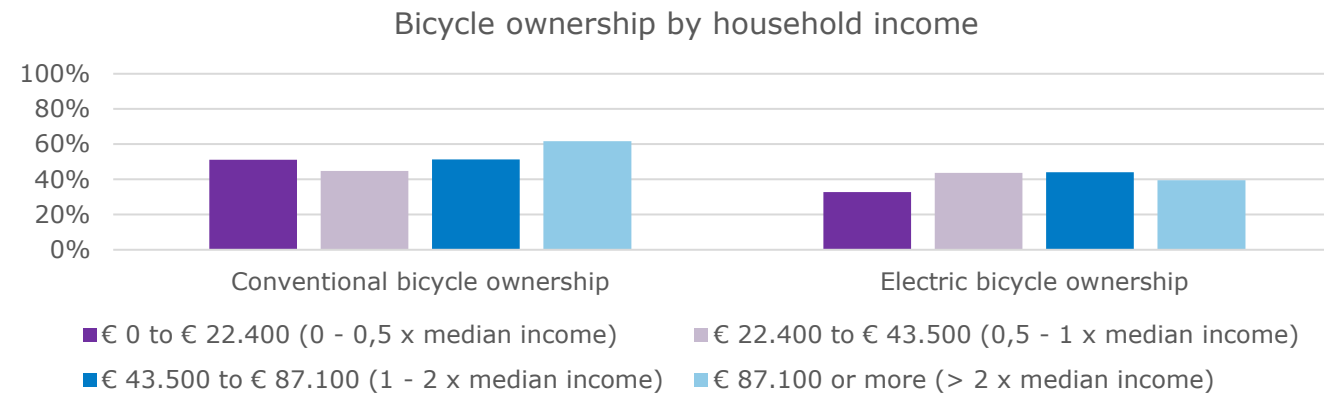
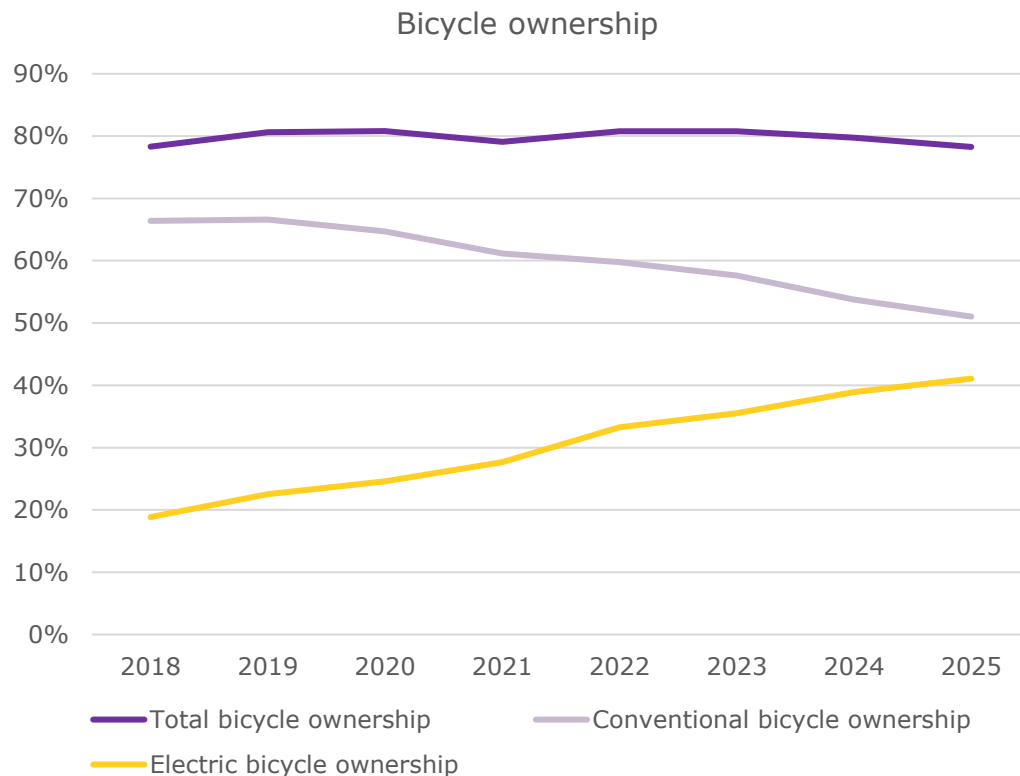
Car ownership in household by level of urbanisation





Bicycle ownership

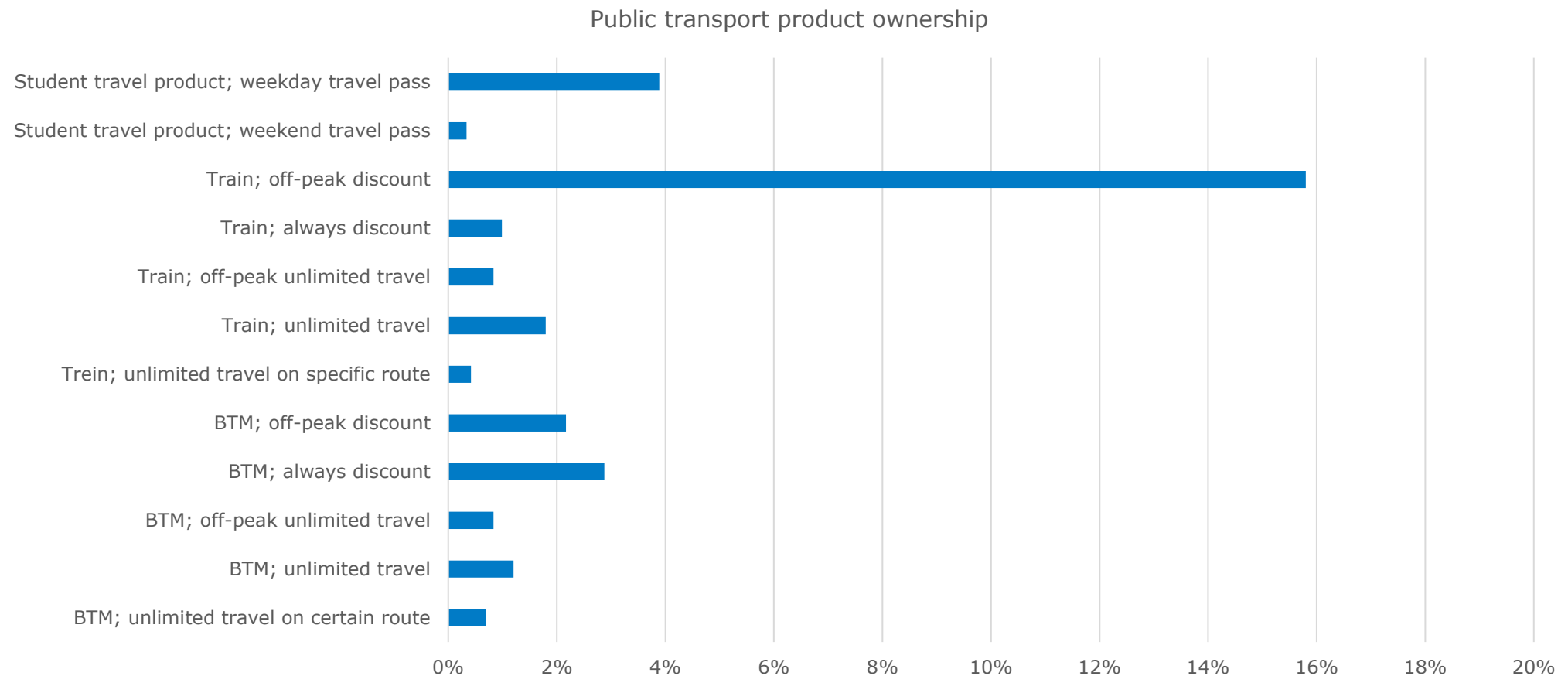
- › The proportion of people who own a bicycle in 2025 is 78%. This proportion has fallen slightly since 2023. The proportion of people who own an electric bicycle stands at 41% in 2025, continuing the growth seen in this figure since 2018. This contrasts with a decline in ownership of conventional (non-electric) bicycles. In 2025, 51% of people own a conventional bicycle.
- › Ownership of conventional bicycles is highest among people in households with the highest incomes. The proportion of people owning an e-bike is highest amongst those in households with an income of 0.5-1 times the median income and 1-2 times the median income.
- › The proportion of people owning a conventional bicycle is highest among 12- to 17-year-olds in 2025 and, in most cases, declines for higher age groups. The proportion of people owning an e-bike is highest among those ages 65 to 74, followed by those aged 50 to 64 and those aged 75 and over.





Ownership of public transport products

- 16% of Dutch people have a public transport subscription that provides discounted train fares during off-peak hours. The student travel product³ for weekday travel and the subscription offering year-round discounts on bus, tram and metro are also relatively common, at 4% and 3% respectively. Just over 4 in 10 people have never used public transport in 2025. If we were to look only at people who use public transport at least once a year, the percentages would be higher. Among them, for example, 28% have an off-peak discount pass for trains (not shown in figure).



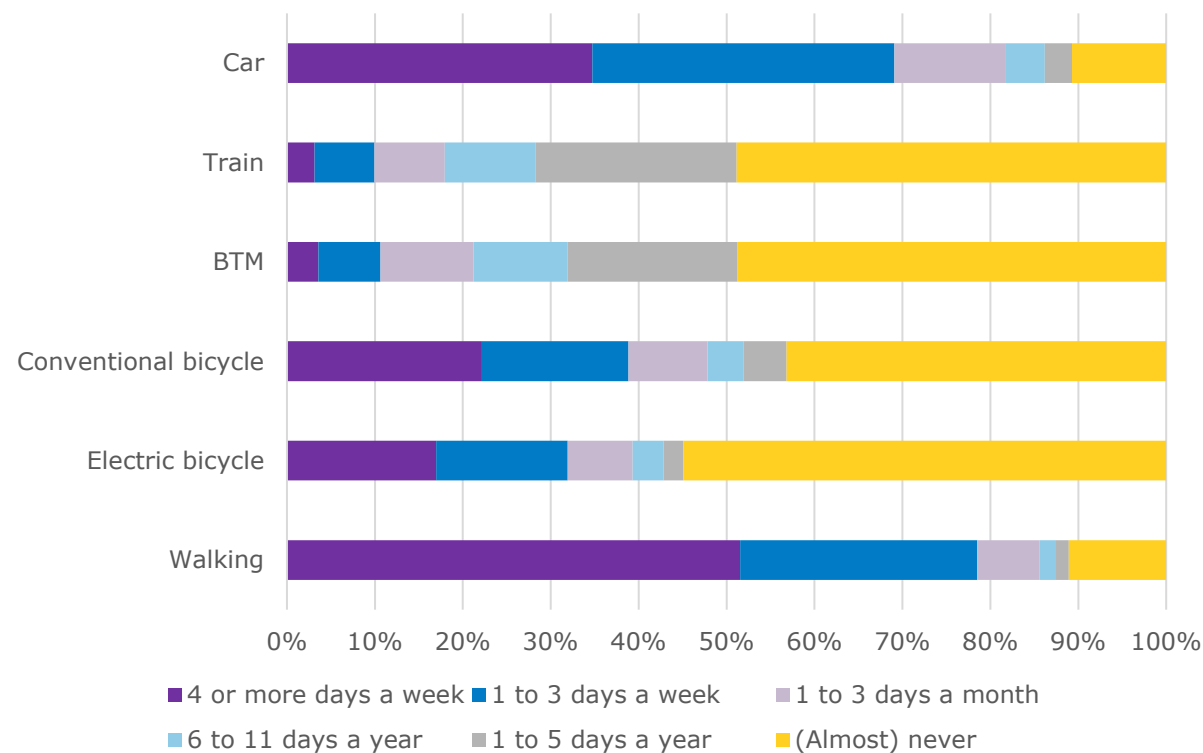
³ With a student travel product, students can travel for free or at a reduced rate by public transport throughout the Netherlands. Students can choose either a weekday or weekend subscription. For more information, see: [What is the student travel product – DUO](#)



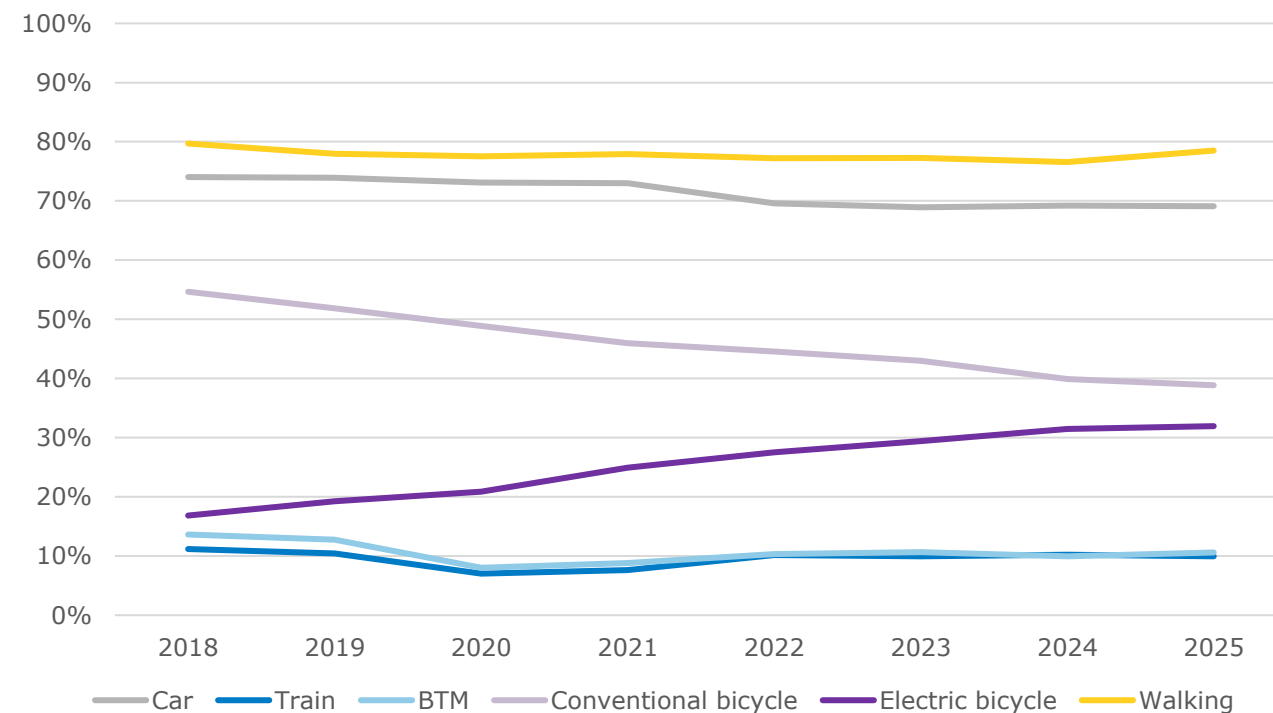
Frequency of modes of transport use

- › Dutch people travel most frequently by car or on foot. In 2025, 69% use the car at least once a week and 79% travels on foot at least once a week. Conventional bicycles and electric bicycles are also used at least once a week relatively frequently (by 39% and 32% respectively). Trains and BTM are used at least once a week by 10% and 11% of the Dutch population respectively.
- › The proportion of Dutch people who use a particular mode of transport at least once a week changes over time. For example, the proportion of people who frequently use e-bikes has risen significantly since 2018, whilst the proportion who frequently use conventional bikes has fallen since then. The proportion of people who walk frequently and the proportion who use a car frequently have remained relatively stable between 2018 and 2025, although the proportion of frequent car users did fall slightly between 2021 and 2022. The proportion of frequent train and BTM users fell significantly during the COVID period. Although both proportions have risen slightly since then, they are (still) lower in 2025 than they were before COVID.

Frequency of mode of transport use



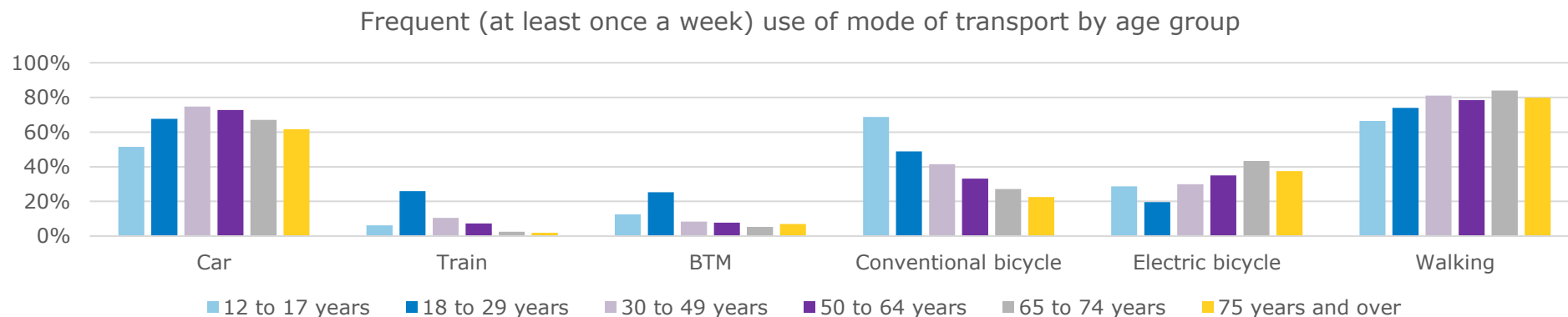
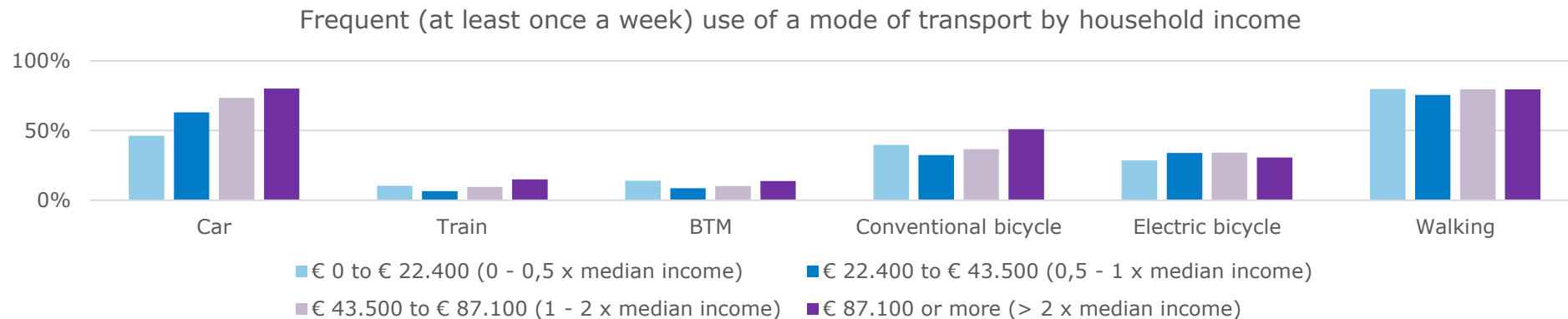
Proportion of people using a mode of transport at least once a week





Frequency of mode use by income and age

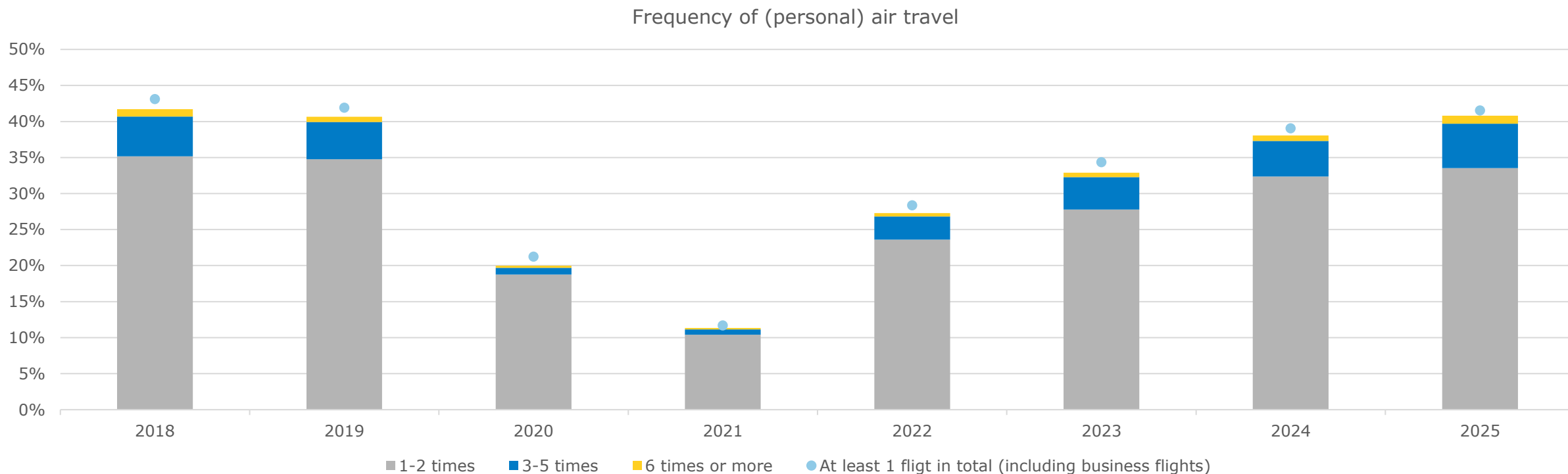
- > The proportion of people who use a car frequently rises with household income: from 46% for those in the lowest household income group to 80% for those with a household income of more than twice the median. The proportion of people who cycle frequently is highest amongst those with the lowest household income and among those with the highest household income. E-bike use, on the other hand, is most popular amongst middle-income earners.
- > The proportion of people who frequently use a car increases with age up to the 30-49 age group, after which it decreases. Train and BTM usage are clearly highest amongst 18 to 29-year-olds. A relatively large proportion of this group consists of students in possession of a student travel product. Conventional bicycles are used most frequently by 12 to 17-year-olds, whilst e-bikes are used most frequently by 65 to 74-year-olds. Young people walk slightly less often than people aged 30 and over.





Frequency of (personal) air travel

- By 2025, 41% of Dutch people aged 12 and over have flown at least once (there and back) for personal purposes. If we also include business travel, this figure rises to 42%⁴. 34% of people flew once or twice for private purposes, 6% 3-5 times and 1% six times or more.
- The proportion of people who have taken at least one flight in a year is recovering following the sharp decline during the COVID period. This recovery continues in 2025. However, the proportion of people who have taken at least one flight in 2025 is still (slightly) lower than before the COVID pandemic.



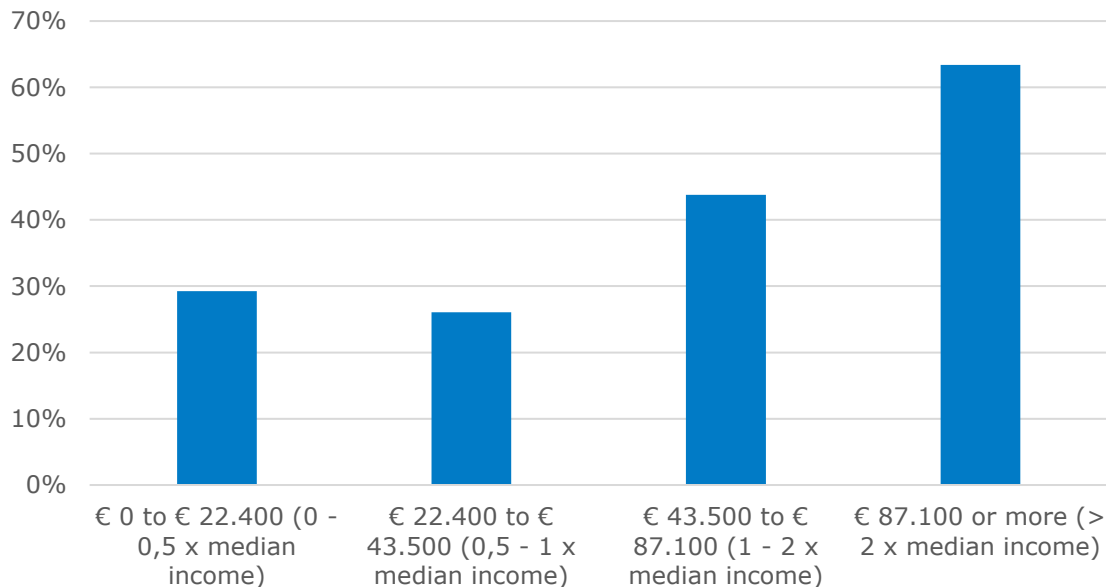
⁴ For more information on air travel by Dutch people, see: [The Flying Dutchman 2024 | Netherlands Institute for Transport Policy Analysis](#). This report shows that 50% of the population aged 18 to 80 did not fly in a given year. In this publication, we look at all residents of the Netherlands aged 12 and over. Partly for this reason, the results of these analyses are different.



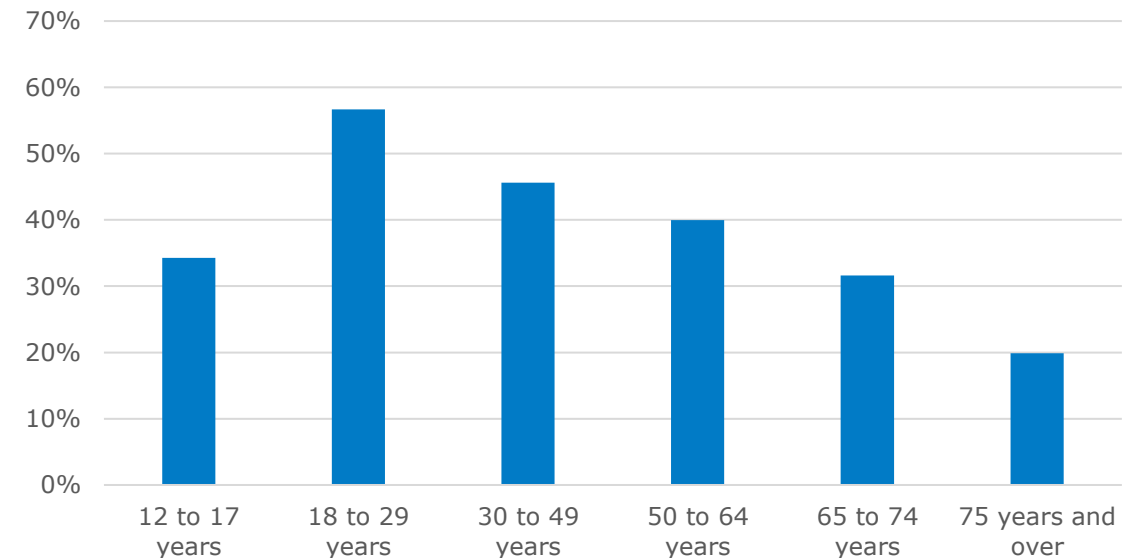
Frequency of (personal) air travel by income and age

- › Generally speaking, the proportion of people who have flown at least once in the past year increases with household income. This stands at 29% among those with a household income at or below the median, and 63% among those with a household income more than twice the median. An exception to this relationship between income and frequency of flying is the lowest income group, among whom the proportion of people who have flown is higher than amongst the slightly higher income group (26%). Part of this group consists of students; they fly relatively often (as is also reflected in the age analysis).
- › The proportion of people who have flown at least once is highest among 18- to 29-year-olds (57%). This figure decreases slightly in the older age groups, falling to around 20% among those aged 75 and over. Among 12- to 17-year-olds, the proportion who have flown at least once in the past year is around 35%.

Proportion of people who have flown at least once, by household income



Proportion of people who have flown at least once, by age group





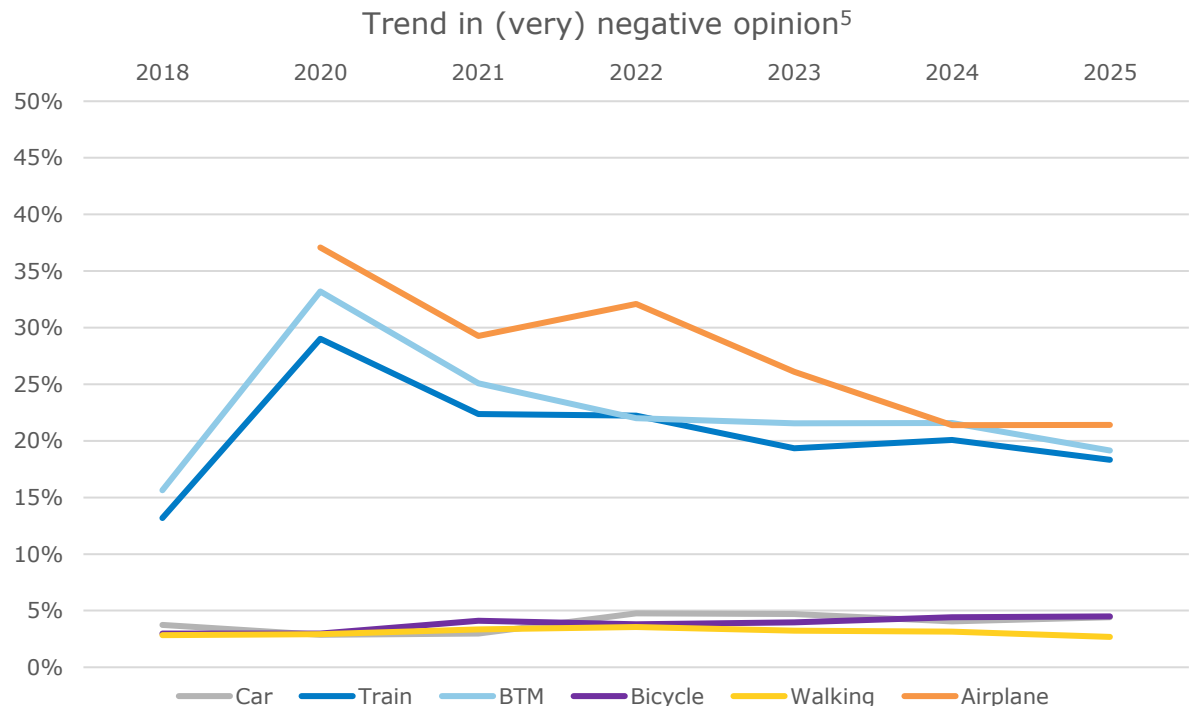
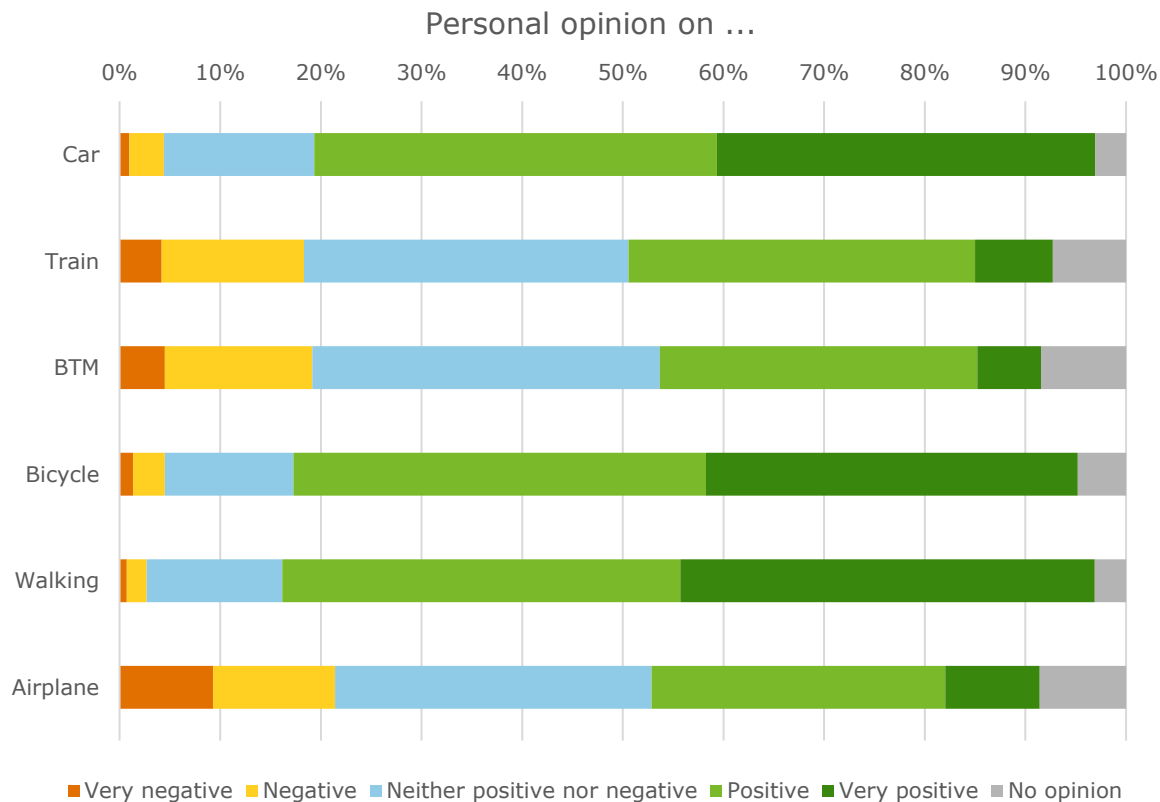
Theme 2: Perceptions of mobility and accessibility

How do Dutch people think about different modes of transport? And what do they think of their accessibility? We explore these questions in more detail within this theme. Once again, we are looking at all individuals within the MPN. This group is representative of Dutch people aged 12 and over.



Opinions on modes of transport

- > Cars, bicycles and walking are most frequently rated positively, with 78%, 78% and 81% of people, respectively, giving a positive rating. Only 4 to 5% have a negative impression of these modes of transport. Trains, BTM and airplanes are clearly viewed less favourably more often. Around 18% (trains and BTM) to 21% (airplanes) have a (very) negative opinion of these modes of transport and a further 31-35% are neither positive nor negative.
- > The proportion of people with a negative view of cars, bicycles, walking and airplanes in 2025 is roughly the same as in 2024. For trains and BTM, there is a slight decrease in the proportion of people with a negative view. Nevertheless, for both public transport and trains, the proportion of people with a negative view of these modes of transport is still higher in 2025 than it was pre-COVID. The proportion with a negative view of flying has fallen since the COVID period, but appears to be stabilising at around 21% in 2025.



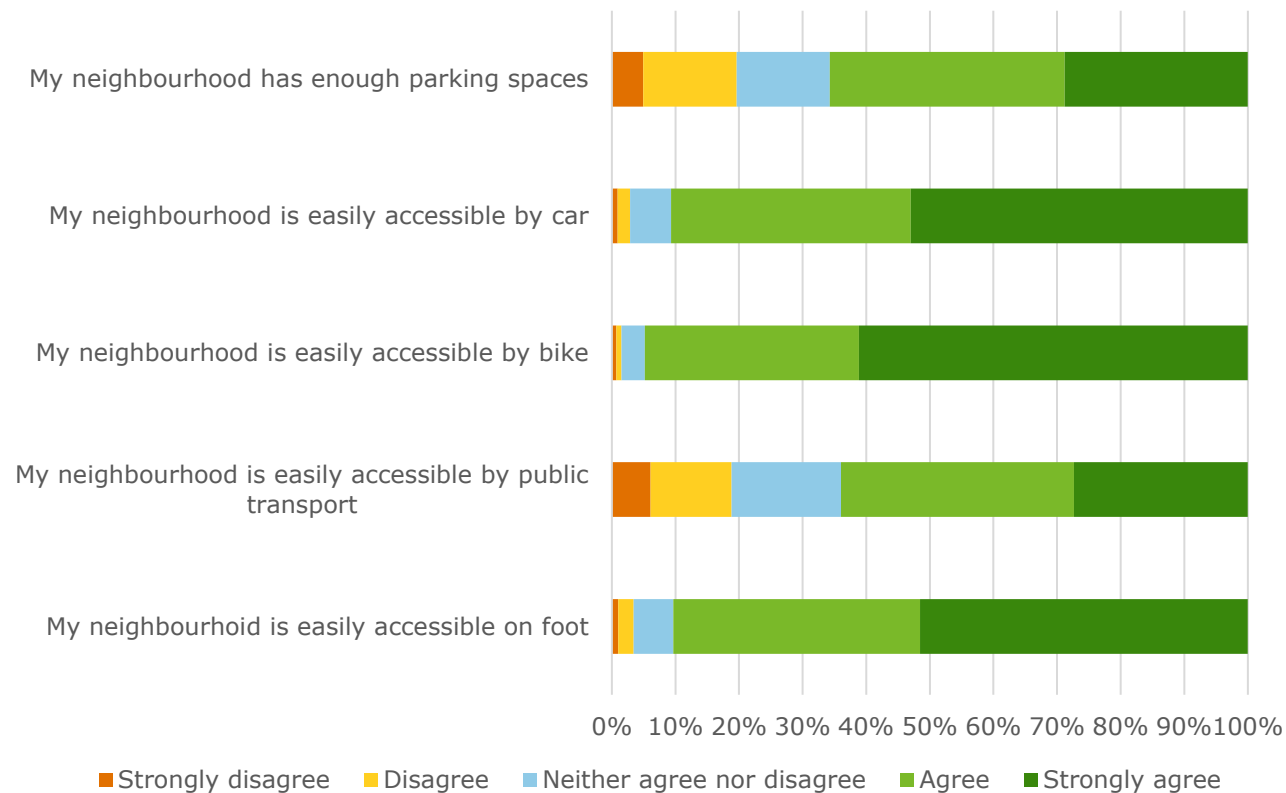
⁵ For the airplane, the trend begins later than for other modes of transport because the question about the personal impression of this mode was added to the survey later than for the other modes. Since the COVID pandemic, the personal impression has been surveyed annually, rather than every other year as in previous years.



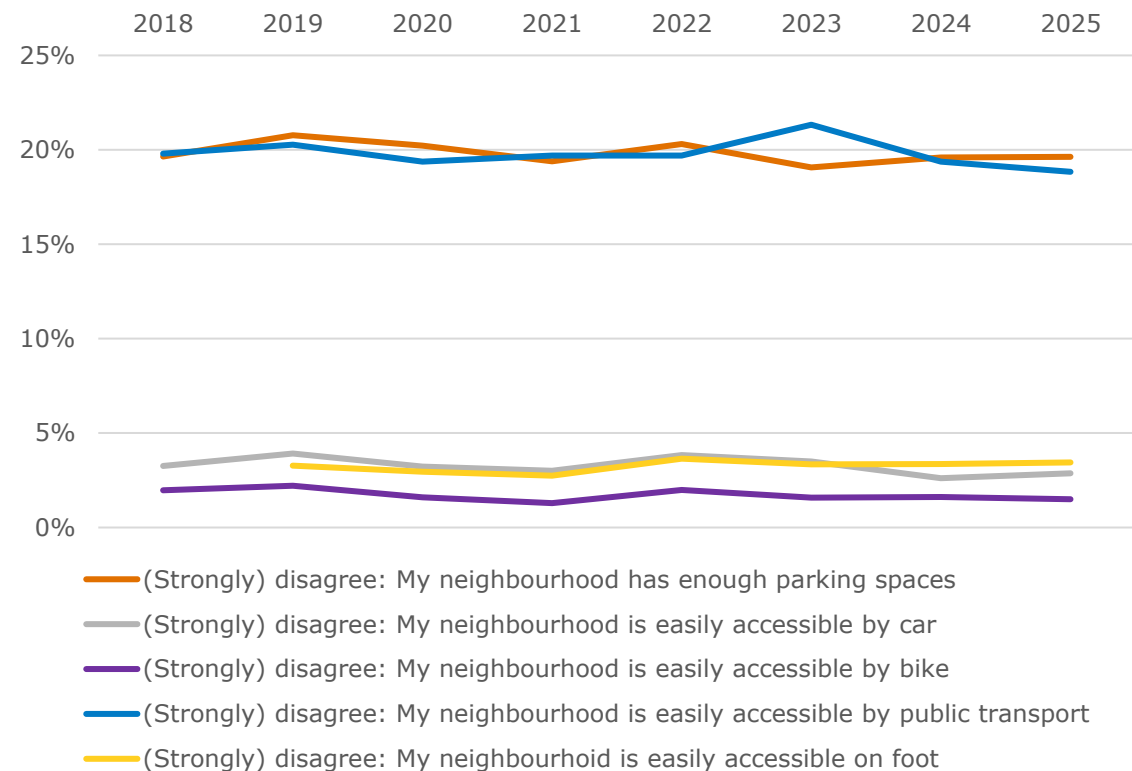
Perception of neighbourhood accessibility

- › The vast majority of people feel that their own neighbourhood is easily accessible by car (91%) or on foot (90%). The picture is somewhat less positive when it comes to public transport, with 19% stating that their neighbourhood is not easily accessible by public transport. Around 20% also feel that their own neighbourhood does not have enough parking spaces.
- › Although there are some year-on-year fluctuations in the proportion of people who (strongly) disagree with the statements on neighbourhood accessibility, the overall trend is fairly stable.

Perceptions of neighbourhood accessibility



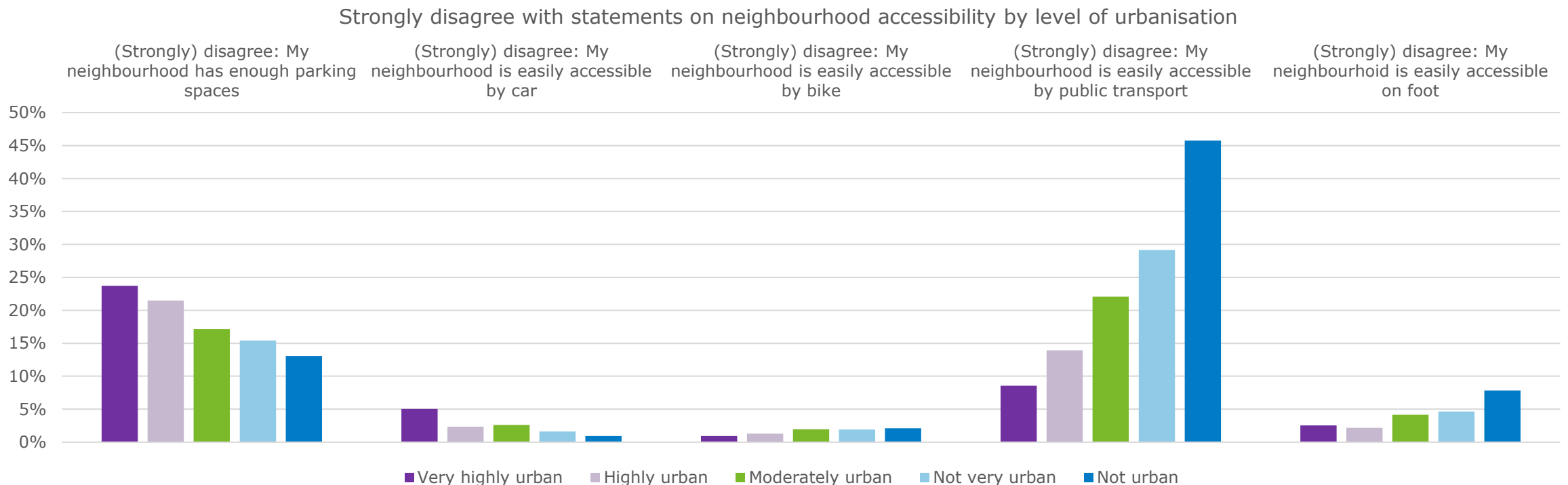
Trend in (strongly) disagree with neighbourhood accessibility statement





Perception of neighbourhood accessibility by level of urbanisation

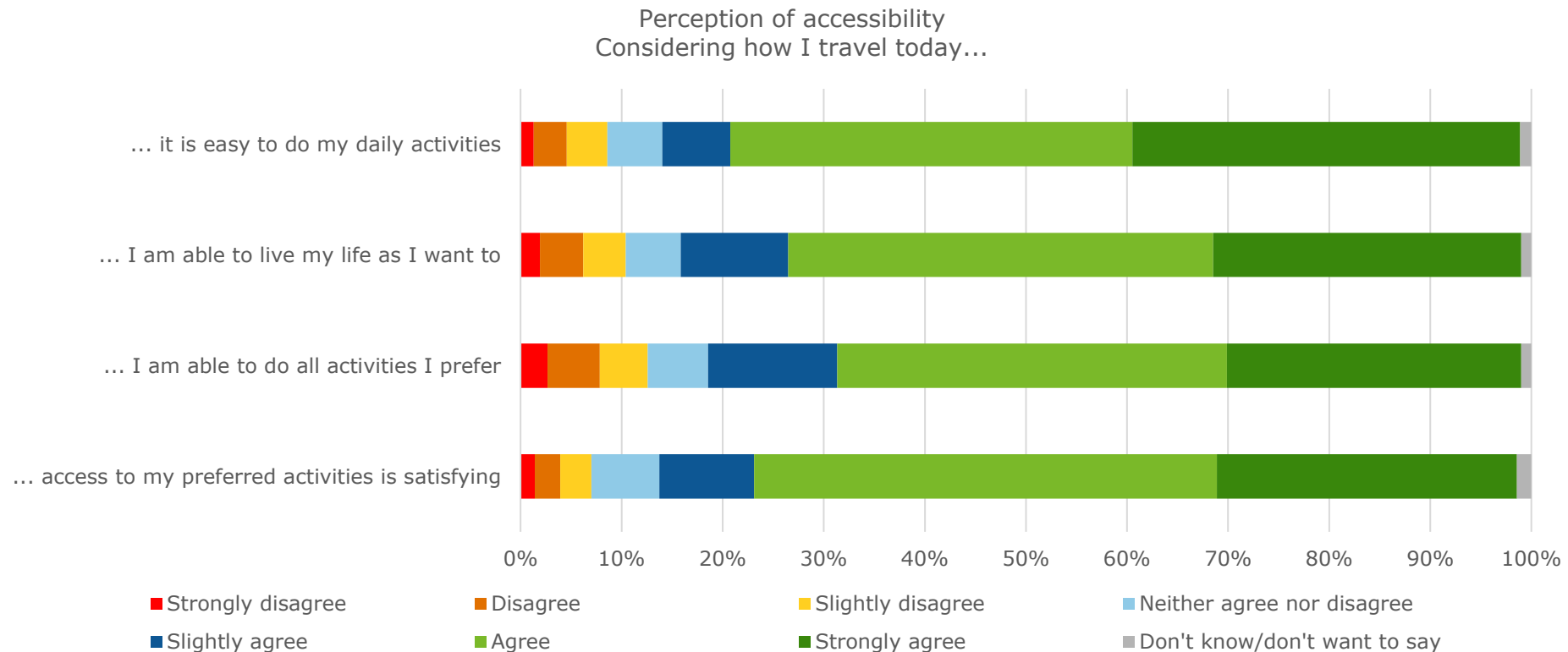
- There are clear differences in the proportion of people who (strongly) disagree with the statements about the accessibility of their neighbourhood, depending on the urbanity of their living environment. People in (very) highly urbanised areas are more likely to feel that their neighbourhood lacks sufficient parking spaces and are also more likely to feel that their neighbourhood is not easily accessible by car than people in less urbanised areas. Conversely, the proportion of people who feel that their neighbourhood is not easily accessible by public transport increases as the residential environment becomes less urban. Whilst 9% of people in highly urbanised areas feel that their neighbourhood is not easily accessible by public transport, this figure rises to 46% in non-urban areas. These perceptions are clearly linked to objective factors; in urban areas there is often less space for parking, whilst in non-urban areas the provision of public transport is, on average, lower.





Perception of accessibility of activities

- › In addition to the perception of the neighbourhood's accessibility via different modes of transport, we can also examine the general perception of the accessibility of activities, regardless of the mode of transport. To this end, we use the four statements from the 'Perceived Accessibility Scale' as designed by Lättman et al. (2018).
- › A large majority have a positive perception of accessibility. For some people, this is less the case. Around 16% (somewhat) disagree with at least one of the statements.





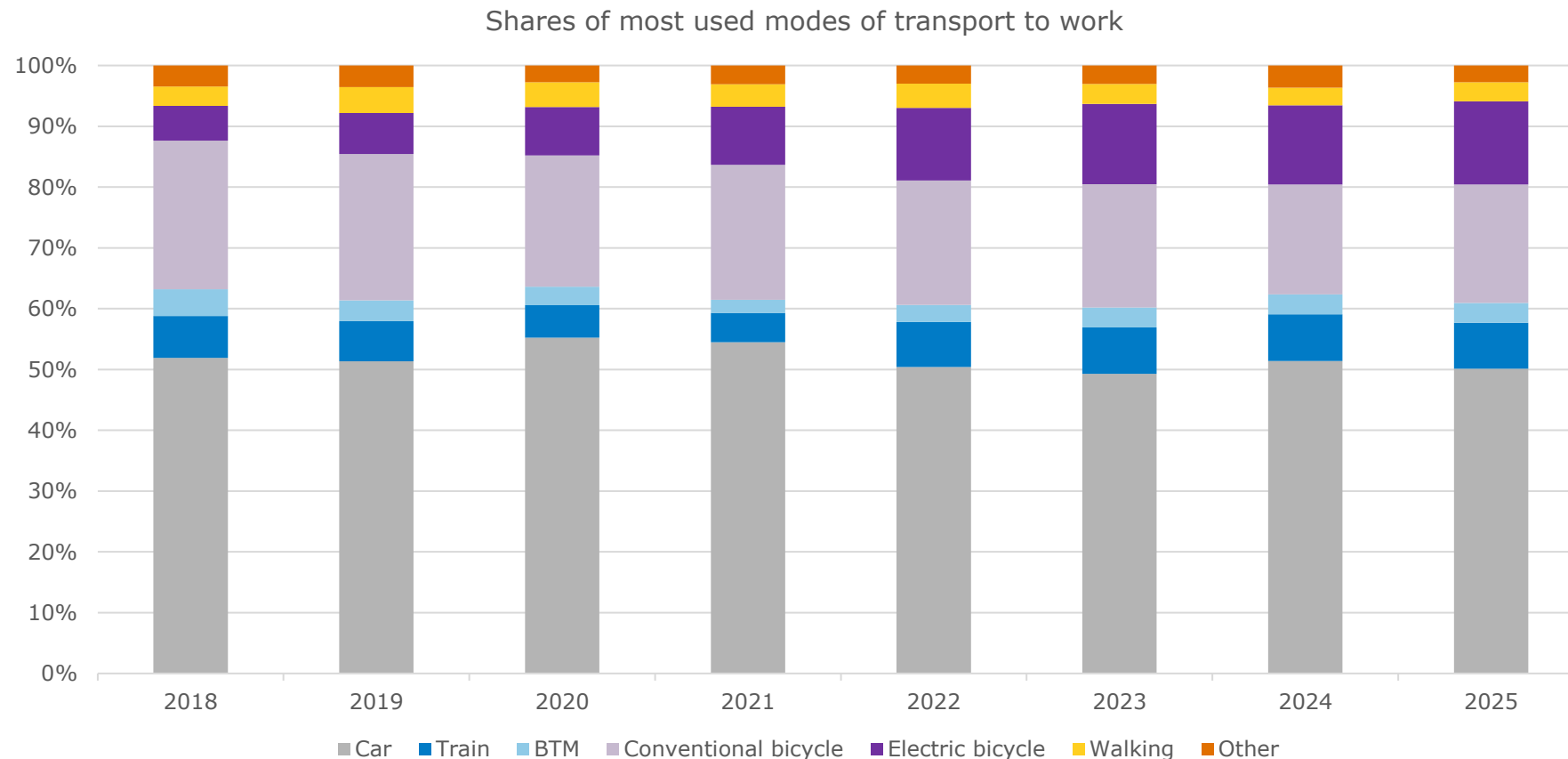
Theme 3: Work-related mobility

How do workers travel to work? And how often and when do they do so? In this section, we take a closer look at workers' mobility. We only consider people in employment. This includes part-time work and voluntary work.



Most used mode of transport for commuting

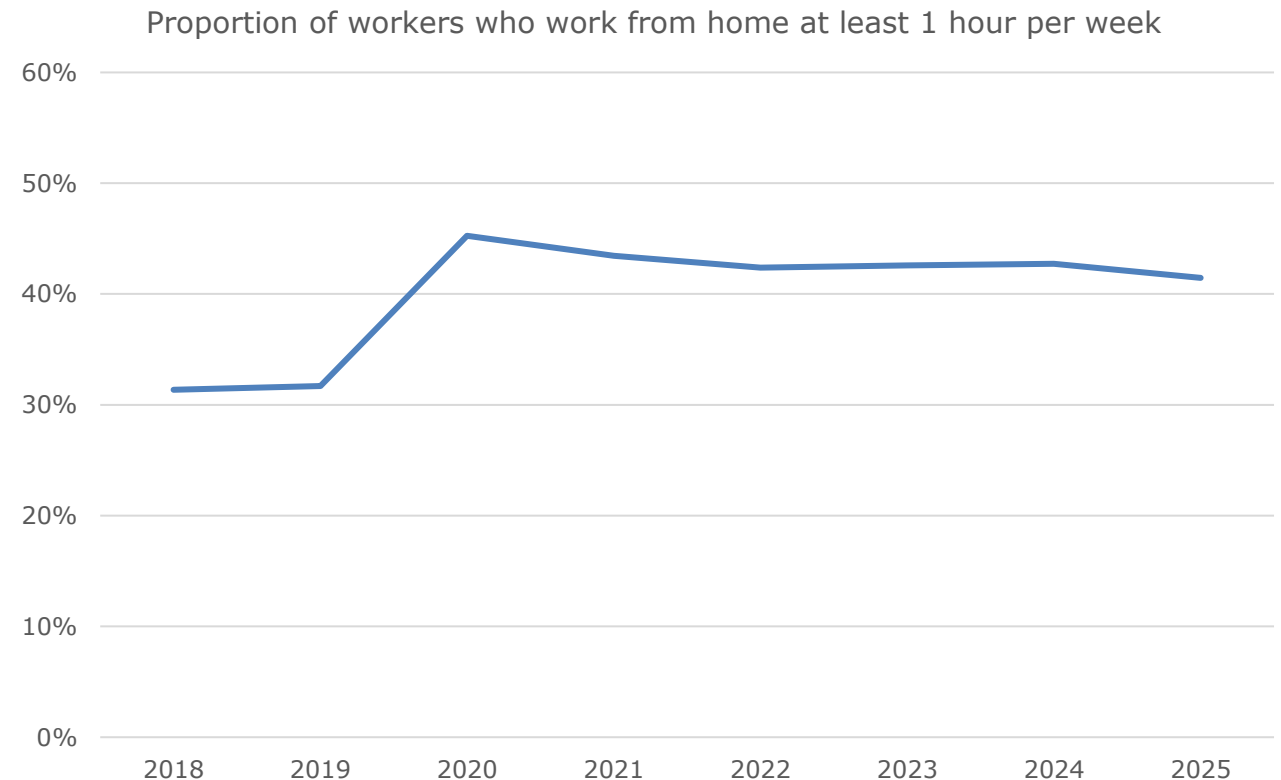
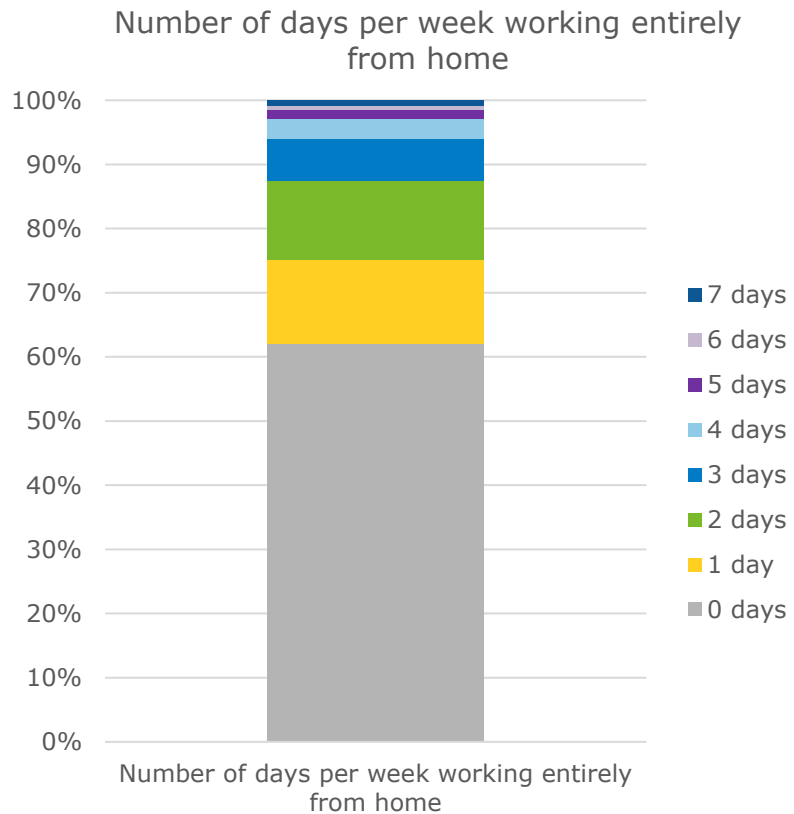
- > The car is the most used mode of transport for commuting to work. In 2025, 50% of workers state that they use the car most often to travel to work. This is followed by the (electric) bicycle (at 34%), then public transport (11%), other modes (3%, such as mopeds) and walking (3%).
- > The shares of the most used modes of transport for commuting have remained relatively stable over the years. However, the share of car use has been slightly lower since 2022 than during the COVID pandemic and before that. The share of e-bikes has grown significantly over the years, mainly at the expense of the share of conventional bicycles.





Working from home

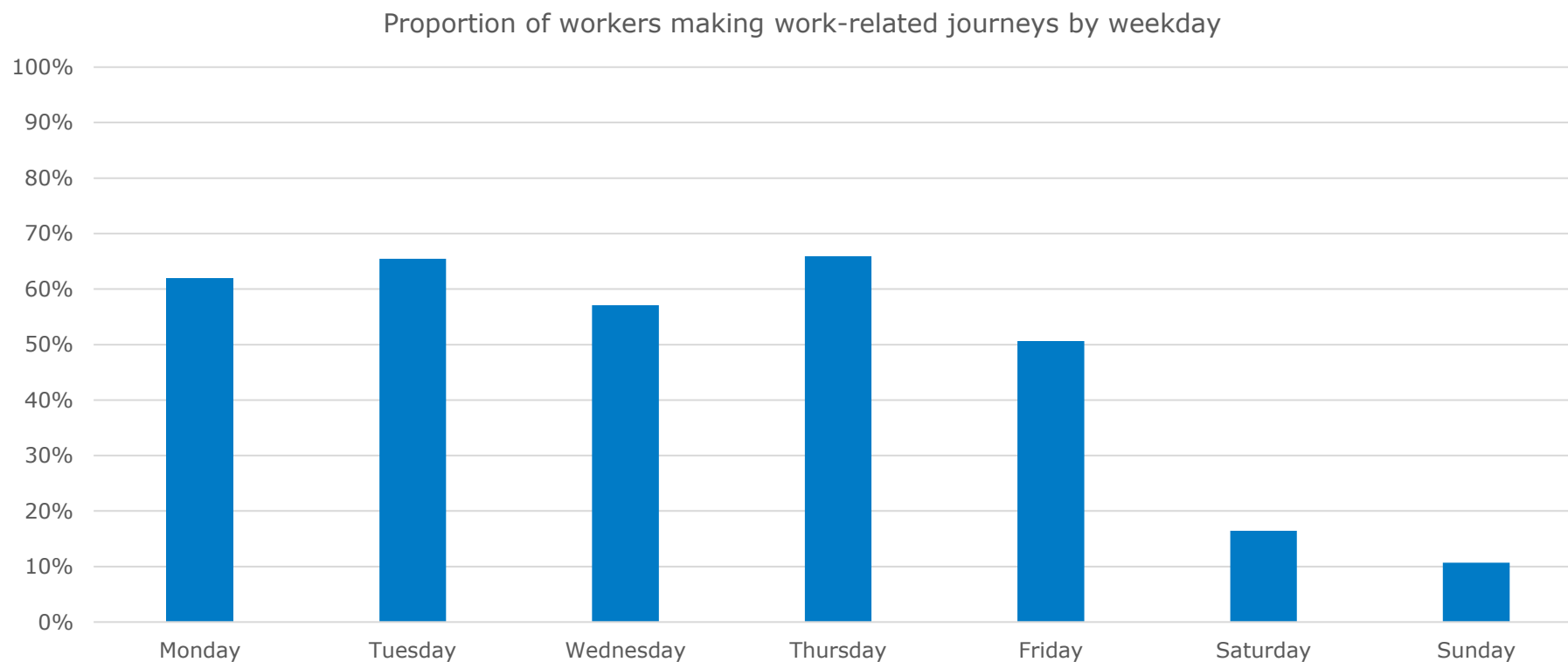
- Around 60% of workers do not work from home on any entire day in 2025. 25% works from home for 1 or 2 entire days a week. The remaining 15% works from home for 3 days or more a week.
- The proportion of workers who work from home for at least 1 hour a week stands at around 41% in 2025. This represents a slight decrease compared with 2024. The proportion of workers who work from home at least 1 hour a week is significantly higher than in the years before the COVID pandemic, when this figure stood at just over 30%.





Work-related travel by weekday

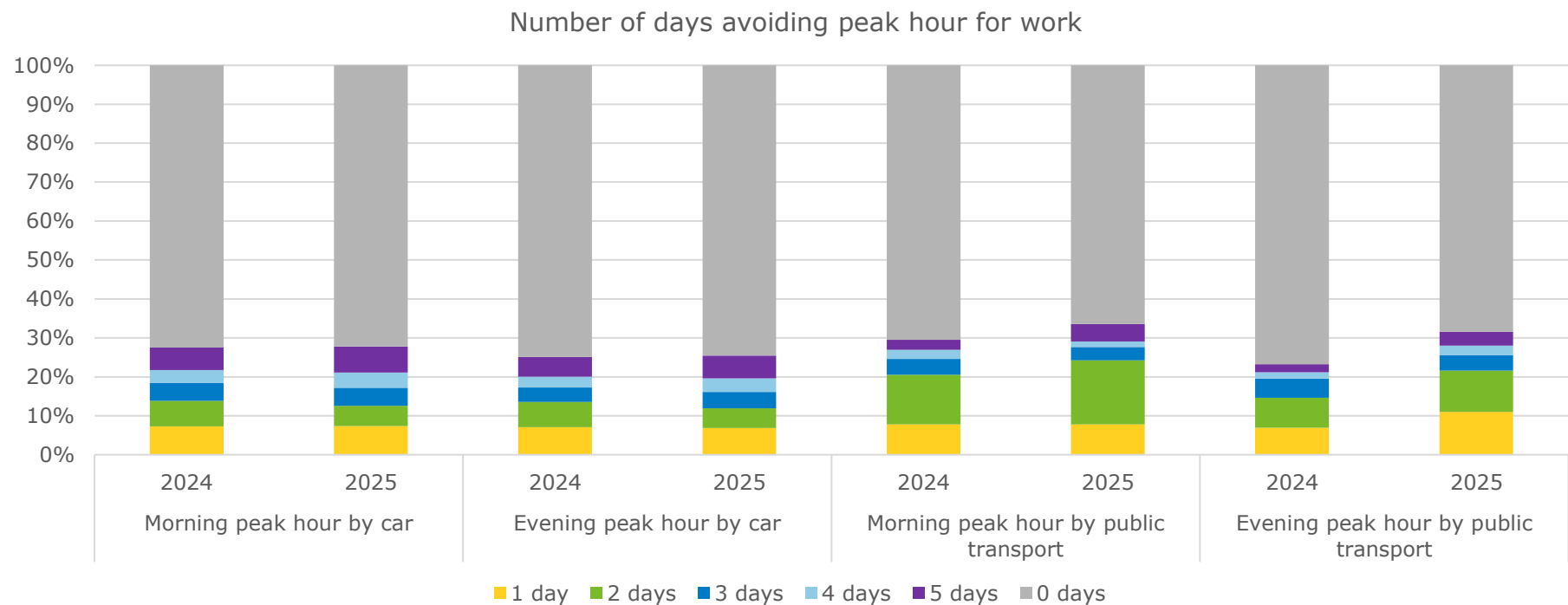
- Workers make the most work-related journeys on Tuesdays and Thursdays, followed closely by Mondays. On these days, 65%, 66% and 62% of workers, respectively, make work-related journeys. Fewer workers make work-related journeys on Wednesdays and Fridays, and certainly on Saturdays and Sundays.





Avoiding peak hours for work trips

- > The majority of workers, 66-75%, does not (consciously) avoid peak hours when travelling by car or public transport⁷ in 2025. People who travel by public transport are relatively more likely to avoid peak hours than those who travel by car. Among workers who travel by public transport, around 32-34% avoid the morning and/or evening rush peak hours at least one day a week. For car users, this figure is 25-28%. Among car users, however, the proportion of people who avoid peak hours on three or more days a week is higher than among train passengers.
- > For both the morning and evening peak hours on public transport, a (slightly) higher proportion of workers avoid them at least one day a week in 2025 compared with 2024. Among public transport commuters, this increase is clearly highest during the evening peak hour (+8 percentage points), followed by the morning peak hour (+4 percentage points). Among workers who travel by car, the proportion of workers who avoid the peak hours on at least one day has remained virtually unchanged for both the morning and evening peak hours (+0.3 percentage points).



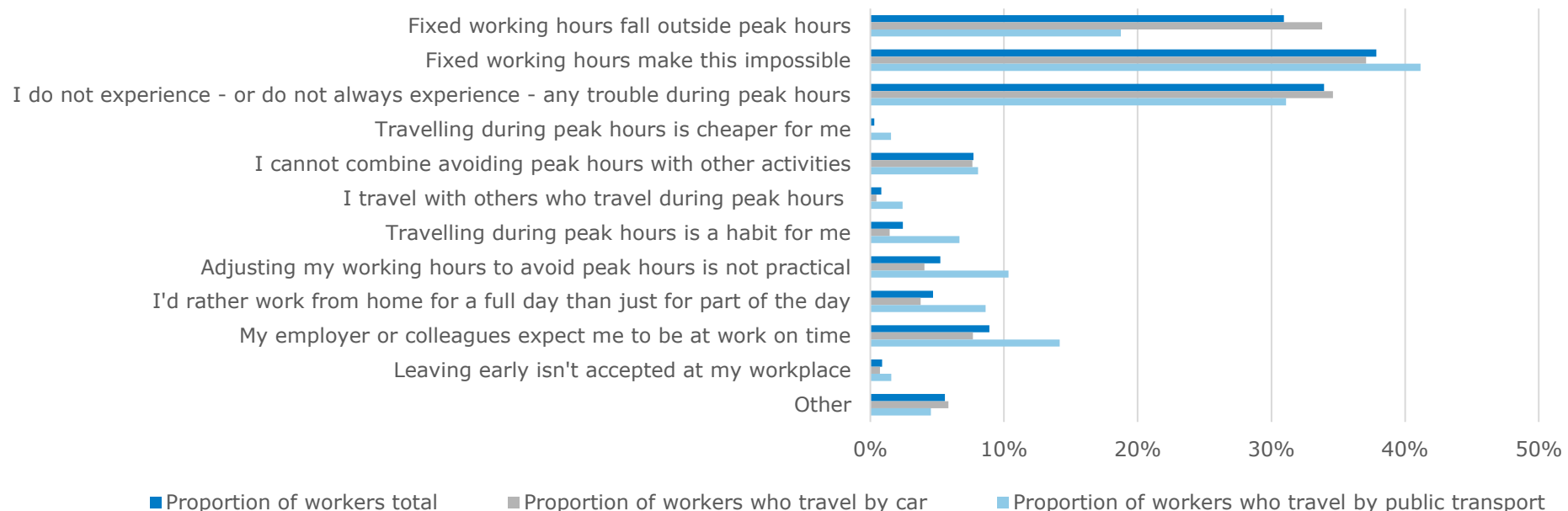
⁷ Workers were asked on how many working days they (usually) deliberately set off for or from work earlier or later to avoid peak hours.



Reasons for not avoiding peak hours among workers

- > Workers who do not (always) avoid peak hours often do so because their fixed working hours do not allow it (38%), because they do not experience any inconvenience from peak hours (34%) or because their regular working hours are already outside peak hours (31%). Other frequently chosen reasons for not avoiding peak hours are employers or colleagues who expect you to arrive at work on time (9%) or because it is difficult to combine with other activities (8%). The fact that travelling during peak hours is cheaper (0.3%), that leaving earlier is not accepted (1%) or that people travel together with others during peak hours (1%) are rarely cited as reasons.
- > There are differences in the reasons most frequently cited, depending on the most common mode of transport used to travel to and from work. Workers who travel by car are more likely to cite having fixed working hours outside peak hours and not always experiencing problems due to peak-hour travel. Public transport users, on the other hand, are more likely to mention, amongst other things, that fixed working hours do not allow for this, that it is customary to travel during peak hours, that they would rather work from home a whole day than just part of the day, and that colleagues expect you to arrive at work on time.

Reasons for not avoiding peak hours among workers





Theme 4: Education-related mobility

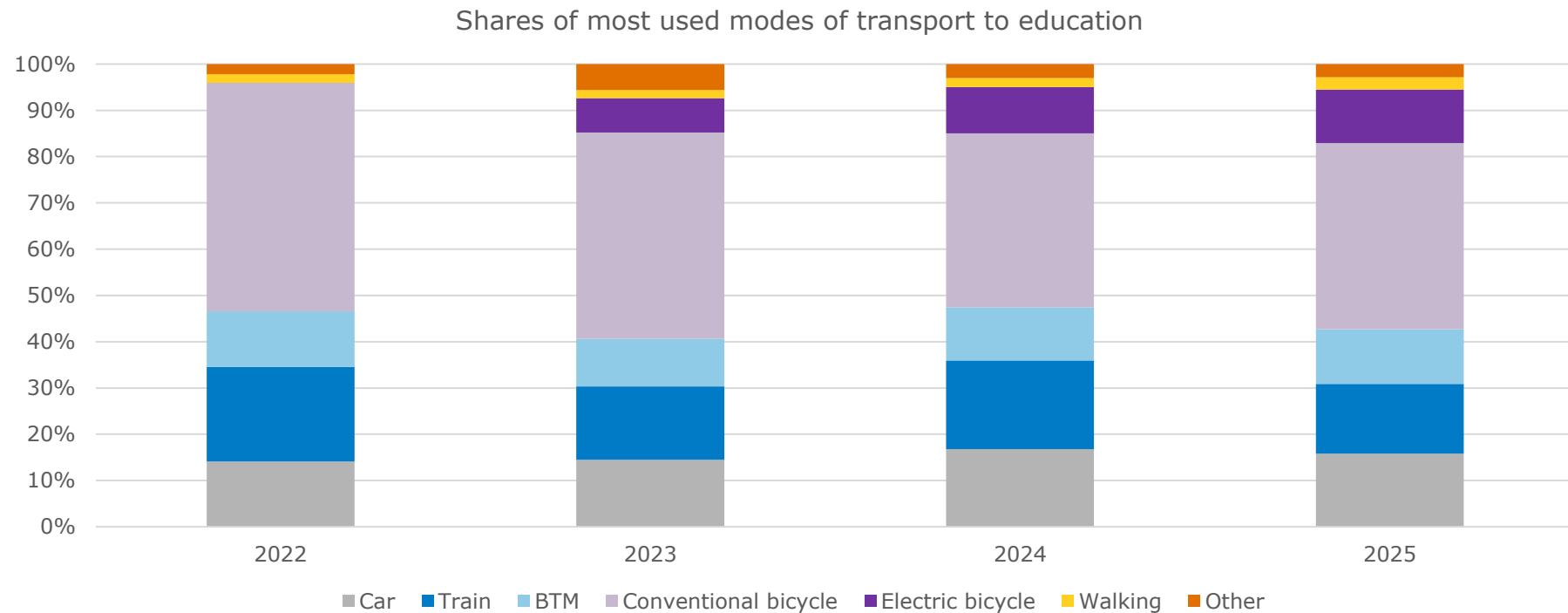
How often do people travel for educational purposes? And how often and when do most trips for education take place? In this theme, we examine mobility for educational purposes in more detail. We focus solely on people who are in education. This includes both school pupils and students, including those studying part-time. As the MPN focuses solely on people aged 12 and over, the group of school pupils in the analysis consists mainly of secondary school pupils.

An important caveat regarding this theme is that the composition of the group of people in the MPN who are in education is not (fully) representative of the Netherlands. For example, there are relatively many students in the MPN who are studying part-time. The exact proportions will therefore not be representative of the Netherlands either. Nevertheless, this section provides an overview of relevant developments and patterns.



Most used mode of transport for education

- › In 2025, the most used mode of transport for travelling to and from school is the bicycle, followed by public transport and then the car. Fewer journeys are made on foot or by other means of transport (such as mopeds) to and from educational institutions.
- › The proportion of school pupils and students who most frequently use e-bikes⁸ to travel to and from educational institutions has risen significantly in recent years. This has been mainly been at the expense of the proportion that uses conventional bikes⁹. No clear trend in usage can be seen for the other modes of transport.



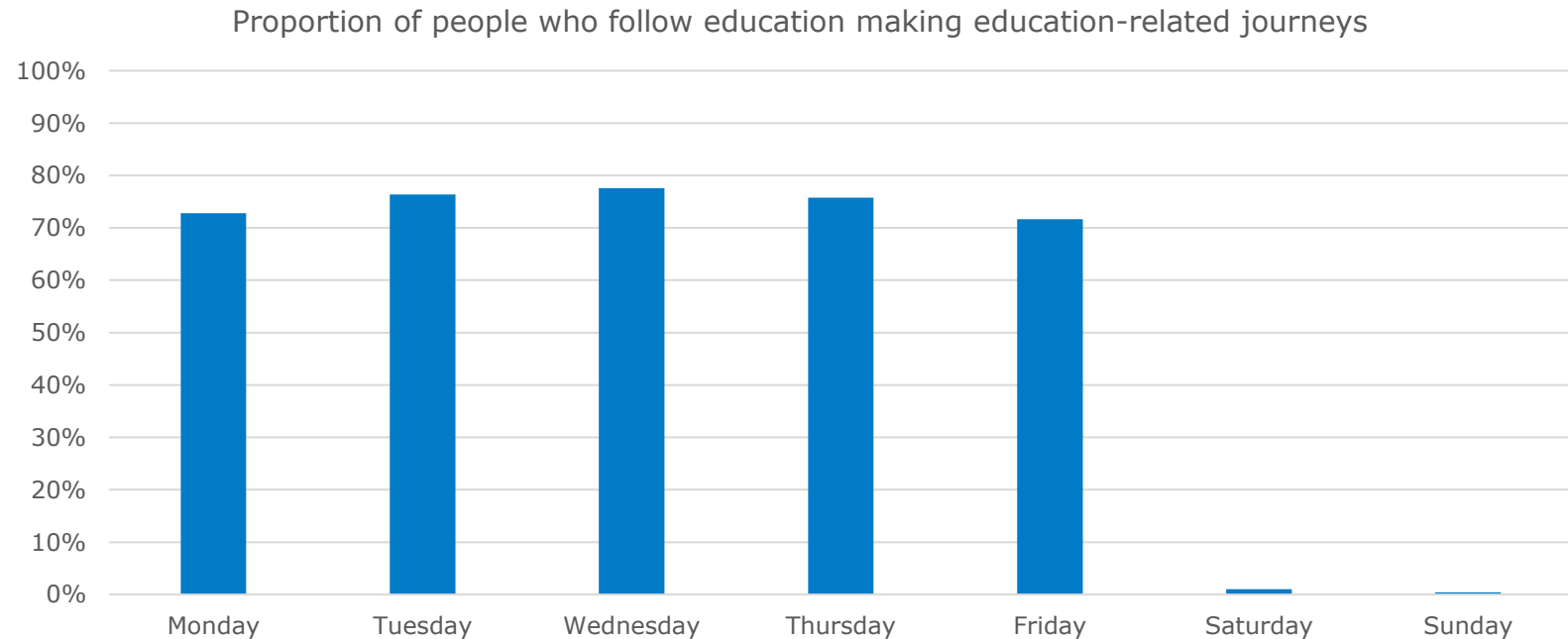
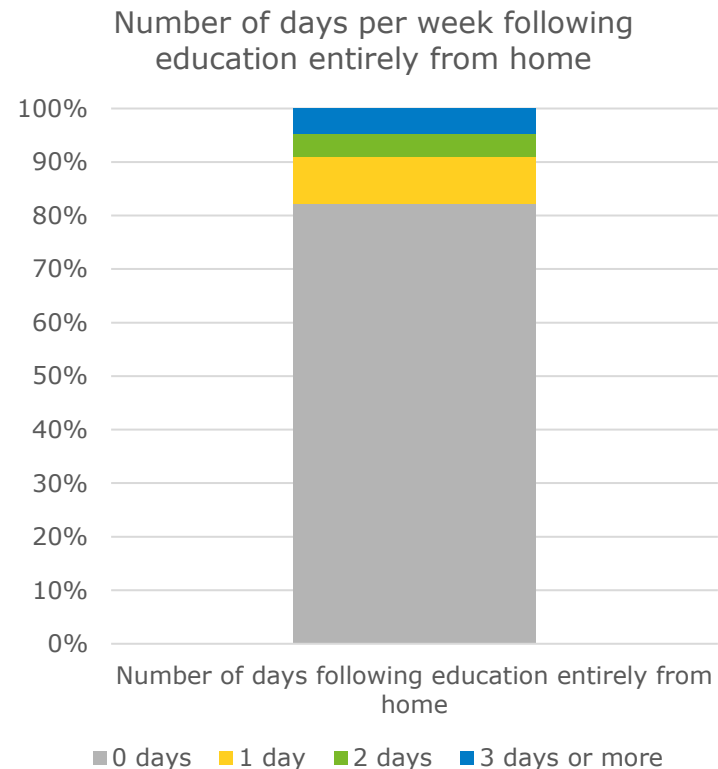
⁸ Electric bikes have only been included as an option in this question since 2023. In 2022, the proportion of cyclists therefore includes e-bikes. In subsequent years, the term 'bicycle' only refers to conventional bikes.

⁹ For more information on the travel behaviour of students and school pupils, see the following KIM publications: [De student als reiziger en Scholieren op pad](#) (only available in Dutch).



Home-based education and education-related travel

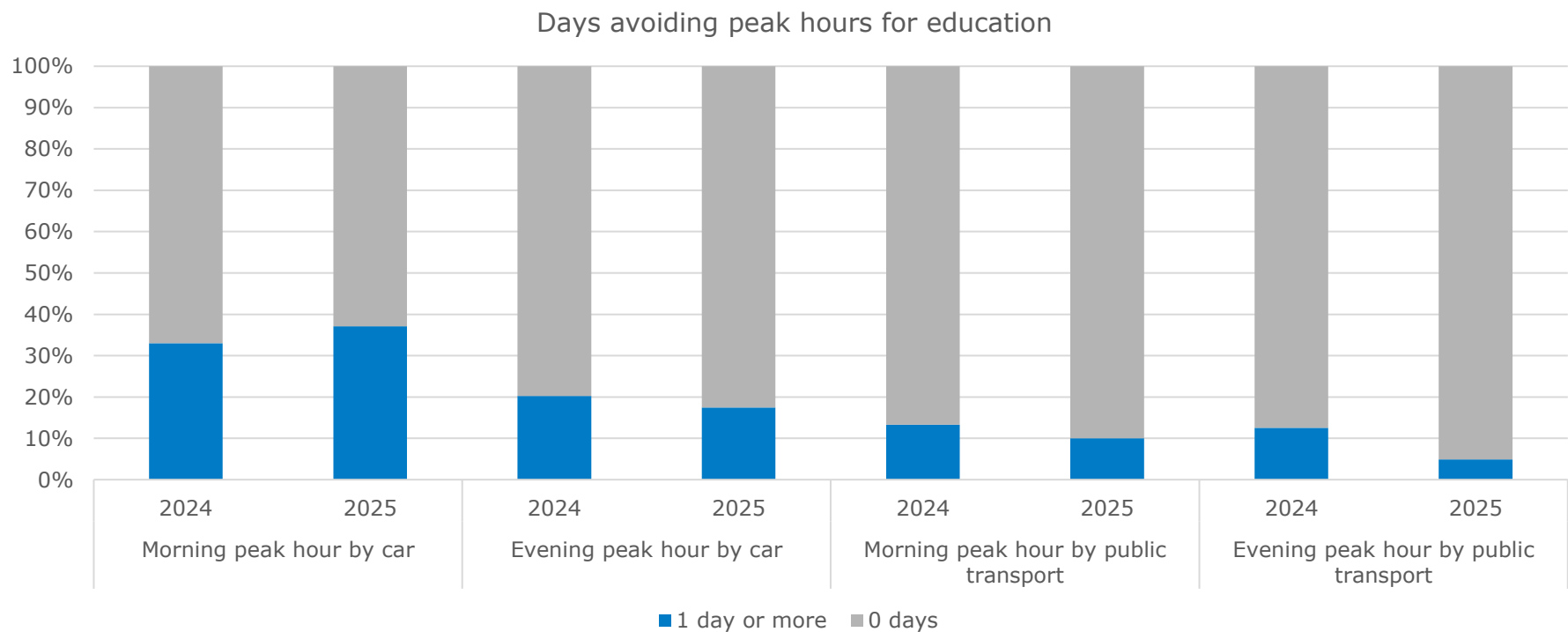
- › The majority of people in education do not study from home for an entire day on any day of the week (around 80%).
- › On Tuesdays, Wednesdays and Thursdays most people travel for educational purposes. However, there is little difference compared with Mondays and Fridays.





Avoiding peak hours for educational travel

- › The majority of people travelling for educational purposes do not (deliberately) avoid peak hours¹⁰ when travelling by car or public transport. People travelling for educational purposes are more likely to avoid peak hours when travelling by car than when using public transport. It should be noted, however, that the sample size for both car and public transport is relatively small. The sample for car consists of around 50 people. For public transport, it consists of around 90 people.
- › A slightly higher proportion of students say they avoid the morning peak hours by car in 2025 than in 2024. For the other types of peak hours, the number of people avoiding peak hours has fallen. Due to the limited sample size, it is difficult to say to what extent this is a representative picture.

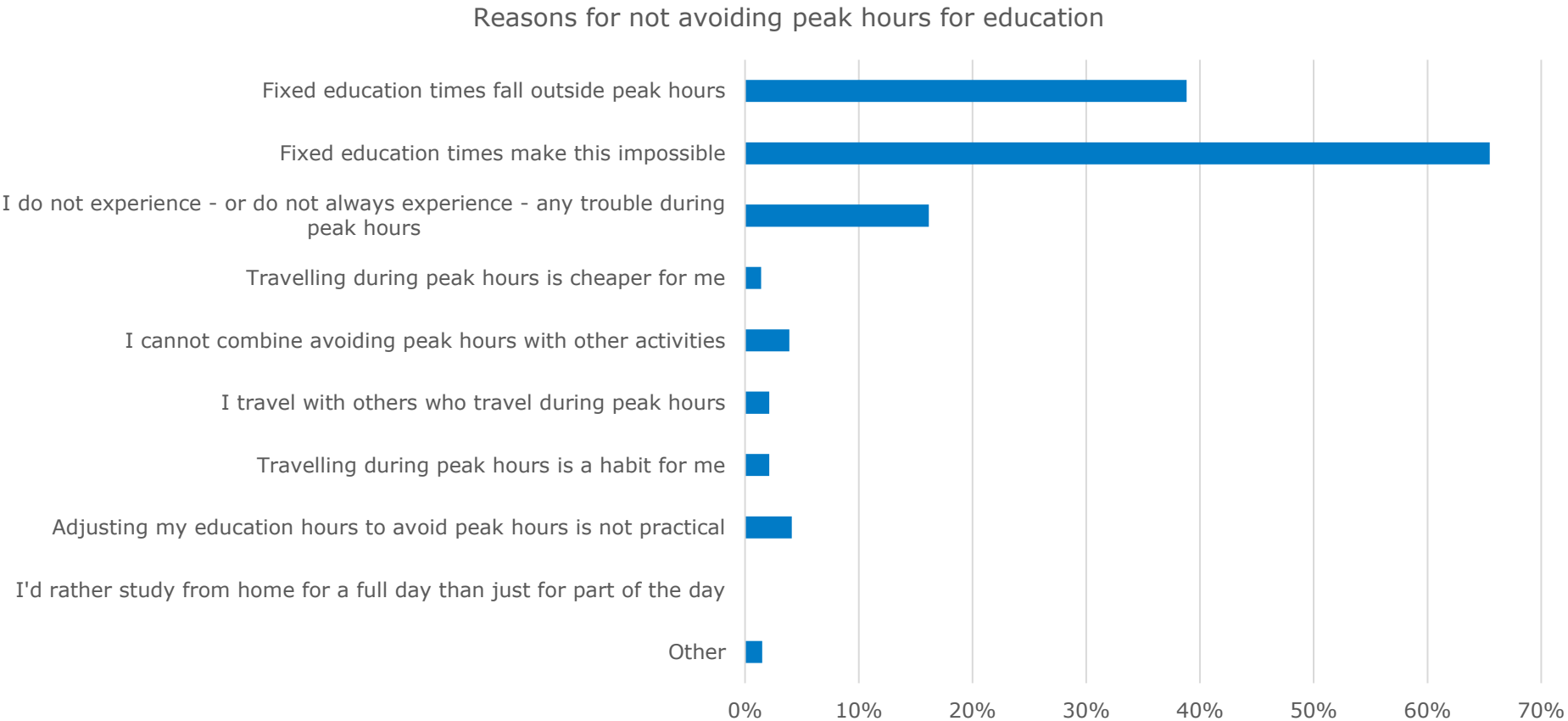


¹⁰ People who follow education were asked on how many days they (usually) deliberately set off for or from their place of education earlier or later to avoid peak hours.



Reasons for not avoiding peak hours for educational travel

- > The most frequently cited reason for not (always) deliberately avoiding peak hours for educational travel is 'fixed education times make this impossible' (65% gave this reason). This reason is followed at some distance by the reason that fixed education times fall outside peak hours (meaning that peak hours cannot or need not be avoided). This is, in turn, followed at some distance by the reason 'I do not experience – or do not always experience – any trouble during peak hours'. The reasons 'I'd rather study at home for a full day than just for part of the day', or 'travelling during peak hours is cheaper for me', are rarely mentioned.





Colophon

This is a publication of the KiM Netherlands Institute for Transport Policy Analysis, Ministry of Infrastructure and Water Management

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