

Grant Agreement number: 265392

Project Acronym: **USEmobility**

Project title: Understanding Social behaviour for Eco-friendly multimodal mobility

Funding Scheme: Coordination and Support Action (Supporting)

Project starting date: 01.01.2011

Project duration: 26 months

Short summary of: Deliverable D2.2 (National trends in passenger transport regarding the choice of transport mode)

Due date of deliverable: 05.05.2011

Completion date of deliverable: 11.05.2011

Lead partner for deliverable: BSL Transportation

Dissemination level: Public

Name of the document: Short summary of the deliverable D2.2

Full report can be downloaded at: www.usemobility.eu

Key Findings

Statistics / Data

National trends in passenger transport show a general increase of mobility and high growth rates in public transport, especially in recent years.

National policy

Political attempts to foster public transport exist in all research countries but do not dominate transport policies

Implication for USEmobility

Results of statistics and policy

National statistics and policies give an aggregate overview of national trends in passenger transport regarding the choice of transport mode at a macroeconomic level.

Need for USEmobility

An individual analysis of passengers behaviour questioning why people use public transport modes more intensely will help all actors to exploit to the full the potential of public transport in the future.

1. Overview and comparison of the countries

2. Quantitative analysis

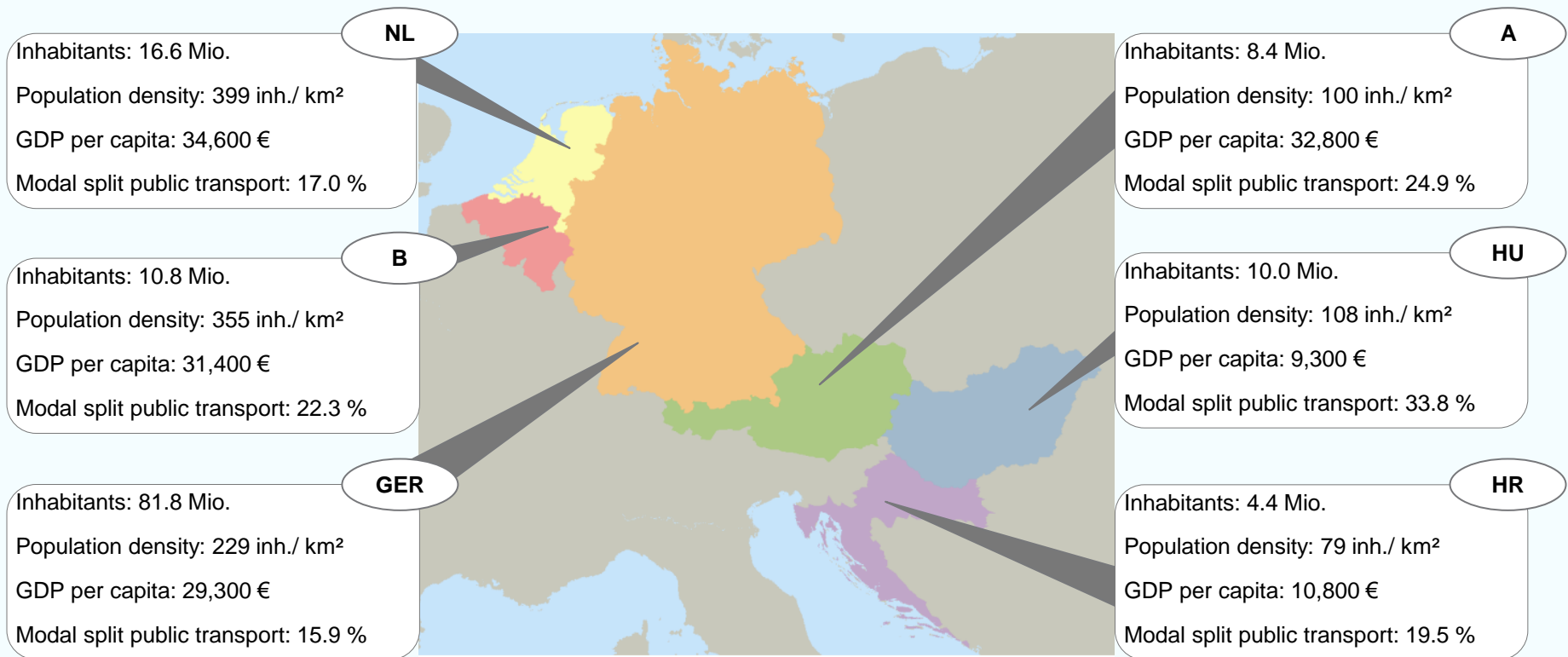
- Macroeconomic analysis of transport markets
- Research period of ten years (2000 – 2010)
- Based on statistics (e.g. transport volume, number of vehicles, economic and demographic development, development of fuel prices and ticket prices in public transport)

3. Qualitative analysis

- Examination of transport policy
- Based on political programs of national/regional governments, relevant legislation, publications of governments, ministries, public transport authorities and providers, civil society organisations (e.g. consumer organisations, environmental organisations).

4. Results of the analyses

The research countries are structured very heterogeneous concerning their dimension and economic performance



Sources: Inhabitants, population density and GDP per capita: Eurostat, 2010. Modal split public transport: Eurostat 2008. Hungarian modal split public transport: Hungarian Central Statistical Office, 2008. Map created with Mappoint 2010 European Maps.

1. Overview and comparison of the countries

2. Quantitative analysis

- Macroeconomic analysis of transport markets
- Research period of ten years (2000 – 2010)
- Based on statistics (e.g. transport volume, number of vehicles, economic and demographic development, development of fuel prices and ticket prices in public transport)

3. Qualitative analysis

- Examination of transport policy
- Based on political programs of national/regional governments, relevant legislation, publications of governments, ministries, public transport authorities and providers, civil society organisations (e.g. consumer organisations, environmental organisations).

4. Results of the analyses

Trends identified in the research countries at a glance

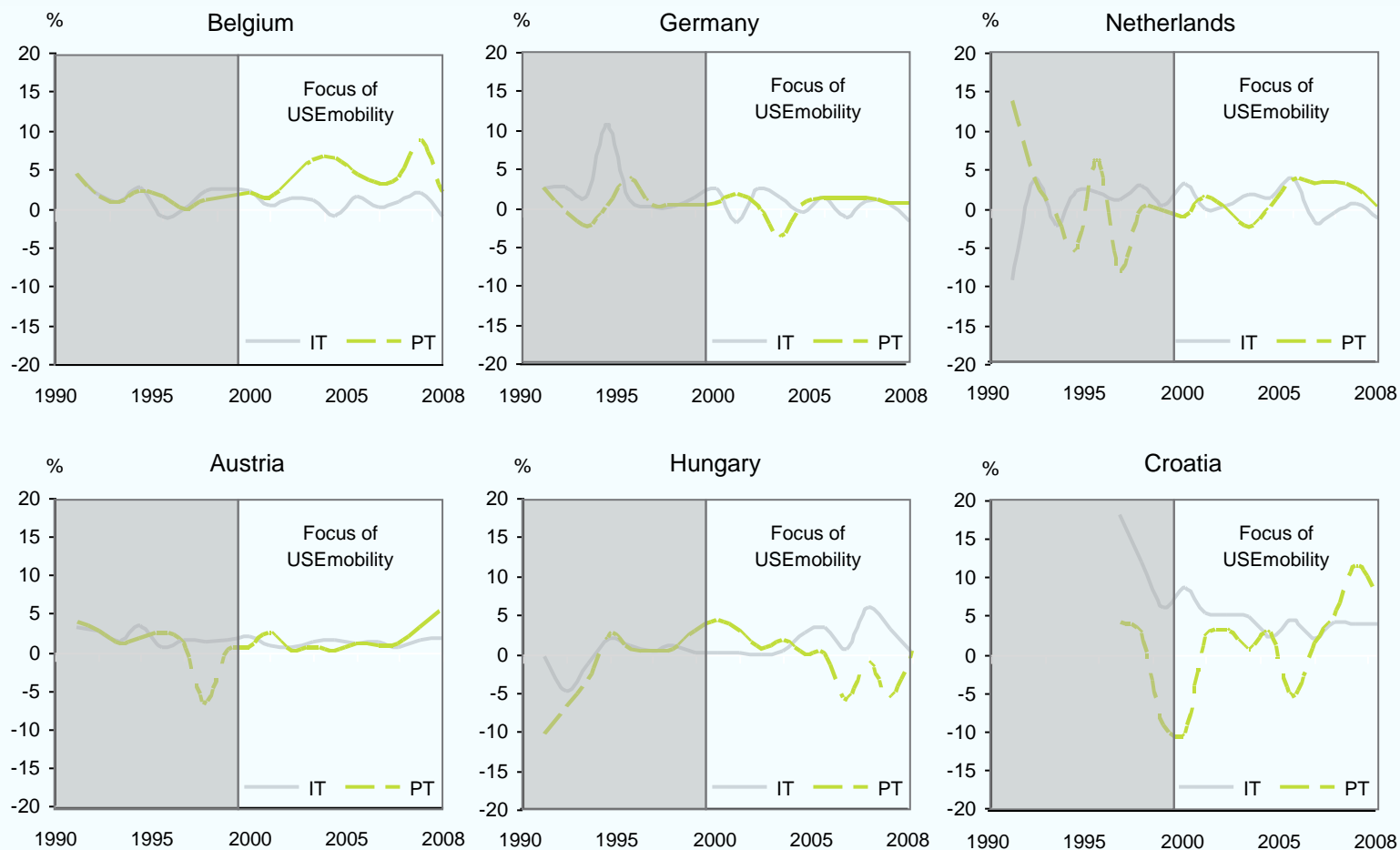
Socio-economic and demographic trends

- Stagnating population figures
- Ageing of the population
- General urbanization
- High economic growth rates in Eastern Europe
- Price increases in individual transport higher than in public transport

Transport and mobility trends

- Public transport is gaining on individual transport throughout Europe
- Eastern Europe is gaining on Western Europe concerning motorization
- Eastern Europe makes up for motorway network expansion
- Supply in passenger transport by railway increases (train-kilometres)
- Stagnation or reduction of rail infrastructure

Growth rates in public transport are mostly higher than in individual transport (especially in recent years)

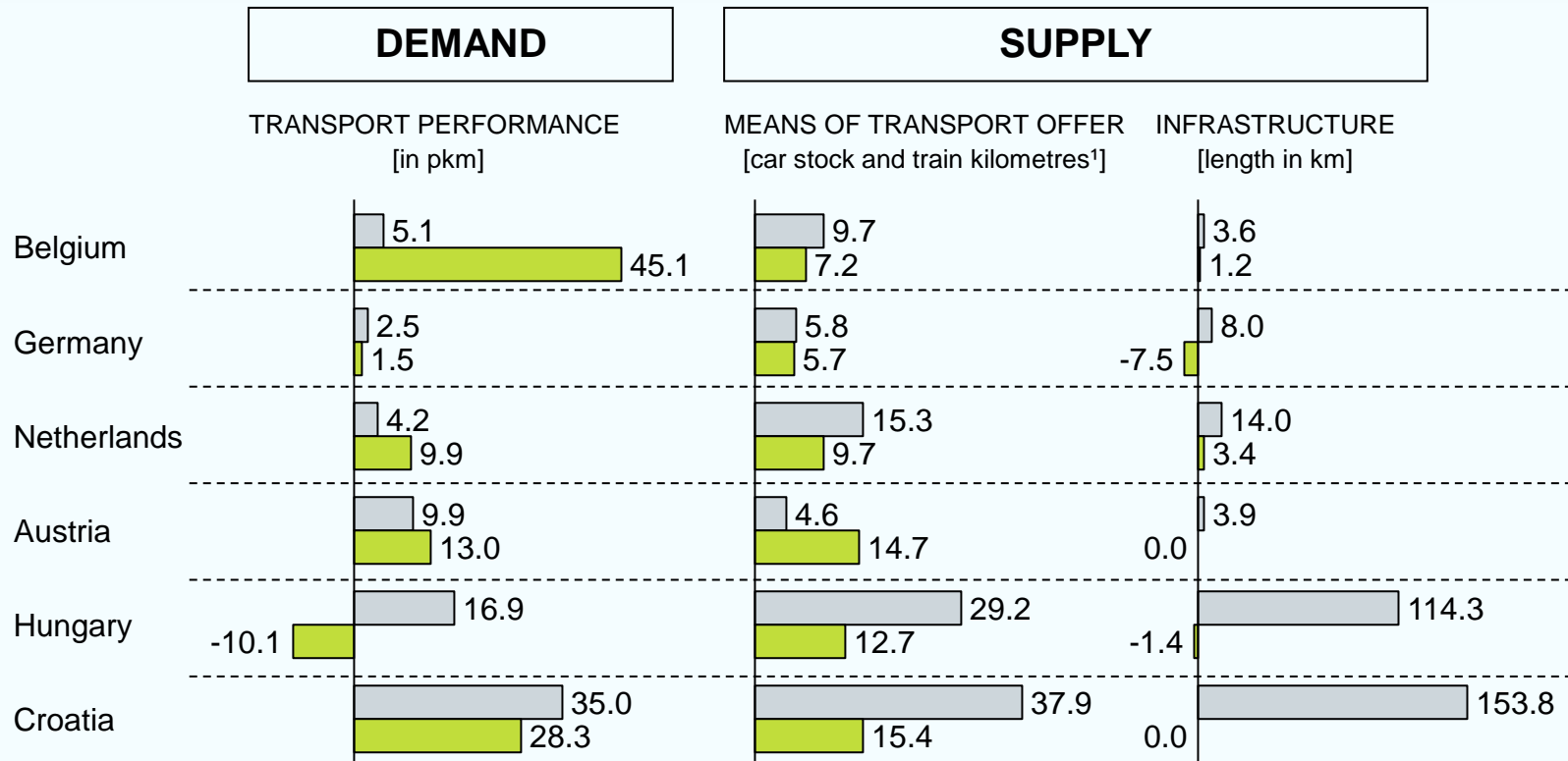


Annual growth rates in public and individual transport 1990 – 2008.

Source: European Commission – Statistical Pocketbook 2010. Hungarian Data: Hungarian Central Statistical Office.

Increasing demand for mobility in almost all research countries

CHANGE OF INDICATORS IN % (2000 – 2008)

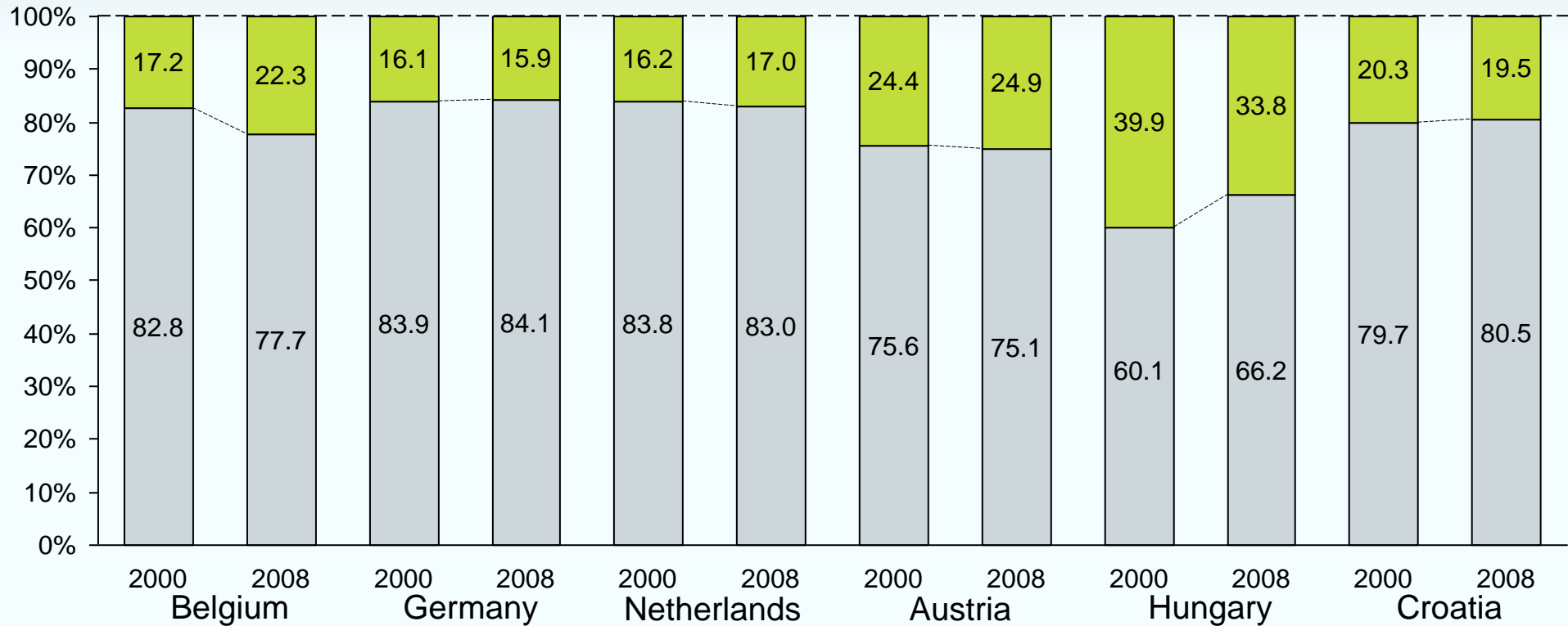




¹) Data for train kilometres in the Netherlands from 2007.

Individual transport (only individual transport by car, without powered two-wheelers)
 Public transport by rail (exception: Demand values present public transport performance in general)

In several countries the demand for public transport showed a greater increase than the demand for individual transport.

Increasing market shares in public transport in some countries



 public transport
 individual transport

Comparison of Modal splits 2000 and 2008 [in % of total pkm]

Source: European Commission – Statistical Pocketbook 2010. Hungarian Data: Hungarian Central Statistical Office.

There seems to be a change from declining market shares in public transport in the past towards increasing market shares at least in some countries.

1. Overview and comparison of the countries

2. Quantitative analysis

- Macroeconomic analysis of transport markets
- Research period of ten years (2000 – 2010)
- Based on statistics (e.g. transport volume, number of vehicles, economic and demographic development, development of fuel prices and ticket prices in public transport)

3. Qualitative analysis

- Examination of transport policy
- Based on political programs of national/regional governments, relevant legislation, publications of governments, ministries, public transport authorities and providers, civil society organisations (e.g. consumer organisations, environmental organisations).

4. Results of the analyses

Positive approaches towards increased multimodality but also obstacles and problems

Positive approaches

- Transport sector is facing major challenges
- Need for political action to make mobility more sustainable is generally seen
- Noticeable increase of attractiveness of public transport

Political objectives

- Making public transport and multimodality more attractive for the users
- Increasing market share of public transport and multimodality (modal shift)

Obstacles and problems

- Fostering public transport is mostly not dominating transport policy
- Measures and implementations are often avoided or delayed due to financial problems
- Still numerous measures fostering individual transport (road construction, tax benefits for company cars, car-scrap bonus, etc.)

Rising awareness

- NGO's claim for more a consistent policy fostering public transport
- NGO's contribute to a rising awareness of problems concerning public transport and multimodality, both in politics and the population

1. Overview and comparison of the countries

2. Quantitative analysis

- Macroeconomic analysis of transport markets
- Research period of ten years (2000 – 2010)
- Statistics (e.g. transport volume, number of vehicles, economic and demographic development, development of fuel prices and ticket prices in public transport)

3. Qualitative analysis

- Examination of transport policy
- Political programs of national/regional governments, relevant legislation, publications of governments, ministries, public transport authorities and providers, civil society organisations (e.g. consumer organisations, environmental organisations).

4. Results of the analyses

Increasing demand for mobility...

- ...viewable in individual as well as in public transport
 - Demand for public transport is growing faster than for individual transport, especially in the last five years
 - There seems to be a change concerning market shares of public transport

Challenging competitive situation...


- ...of public transport towards individual transport
 - Competition within the passenger market
 - And for political support

Objectives to foster public transport exist...

- ...in all research countries at all political levels
 - But still do not dominate transport policies
 - Are often not consistently implemented and delayed
 - Focus on urban areas

Potential still not exploited to the full...

- ...for increased use of public transport
 - Report D2.2 will help to understand transport behaviour in a general way
 - Analysis of changes in passenger's individual behaviour is the focus of USEmobility.



Implication for USEmobility