



ADVANCING
PUBLIC
TRANSPORT

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STATISTICS BRIEF

LOCAL PUBLIC TRANSPORT TRENDS IN THE EUROPEAN UNION

INTRODUCTION

Approximately 57 billion passenger journeys were made by local public transport in the European Union in 2012. National data show significant variation in the level of demand for public transport in different countries. Furthermore, the evolution in the demand for public transport over the 13-year period takes different trajectories in different parts of Europe. The number of journeys has increased in 11 of the EU countries where data are available.

Local public transport, defined as the collective scheduled transport of passengers, over relatively short distances, mainly within urban and suburban areas, is one of the backbones of urban mobility within the EU. The service is provided via either road transport – urban and suburban buses – or rail modes – tramways, light rail, metros and suburban heavy rail – and it carried nearly 57 billion passengers in 2012 in the EU, the latest year for which data for most of the 28 Member States is available. This amounts to just under 182 million journeys on the average working day.

There are 150 annual public transport journeys per urban inhabitant in the EU. In other words, the ‘regular’ urban denizen in the EU undertakes an average of some 3 journeys every week using public transport.

BREAKDOWN BY MODE FOR THE YEAR 2012

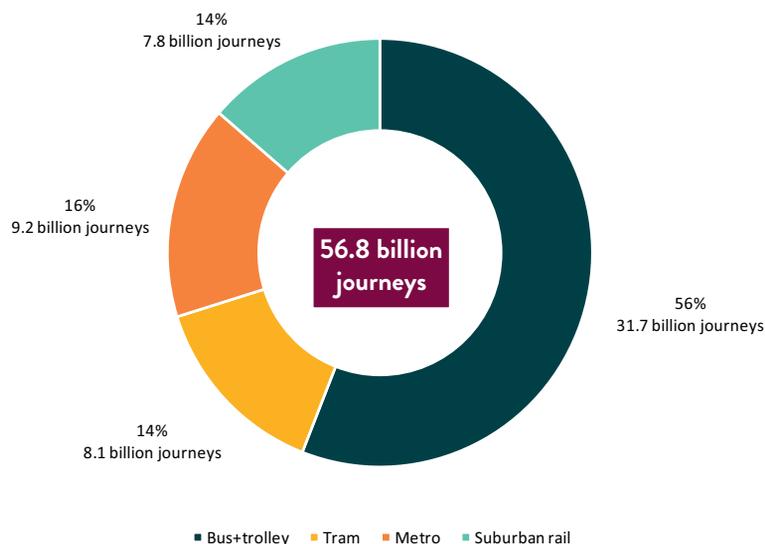


Figure 1 Breakdown per mode of local public transport journeys in 2012 in the EU.

The majority of public transport journeys in the EU are undertaken via urban and suburban bus systems, which account for approximately 56% of the total. Rail-based modes make up the rest: tramways or light rail systems account for 14%, metro systems for 16% and suburban railway makes up the remaining 14% of the total of journeys. There is wide variation in the corresponding shares for each mode in the Member States, with five coun-

tries having a higher share of passengers transported via urban rail modes than buses: Austria, Croatia, the Czech Republic, France and Germany. Furthermore, where metro networks exist – 16 of the 28 Member States – they tend to attract a significant share of the number of public transport journeys. In Austria, France and Spain, for example, metro journeys make up over one quarter of all the journeys for the respective countries.

JOURNEYS BY BUS, TRAM AND METRO FROM 2000 TO 2012

The number of public transport journeys by bus, tram and metro for 2012 stands at over 49 billion for the EU 28 countries, the highest figure recorded for the period. Public transport demand recorded a sustained yearly growth in all the observed years apart from 2009. Only 2009, the year the economic crisis was at its worst, showed a decrease in the number of journeys of 1.7% compared with 2008. Post-2009 improvements in the number of passengers transported have seen pre-crisis levels of ridership progressively restored, and even surpassed in 2012.

The evolution observed in figure 2 can be broken into three distinct phases. Between 2000 and 2005 the steady growth in the number of journeys is in line with an almost equivalent growth in the number of urban inhabitants in the EU. This suggests that the growth was mainly driven by the urban population dynamics. The number of annual journeys per urban inhabitant – for the three modes considered – has remained relatively constant at approximately 131 throughout these six years.

The following three years saw an interesting dynamic in the development of the use of public transport. By 2008 the number of annual journeys per urban inhabitant had risen to 135, which demonstrates an increase in the attractiveness of public transport, whereby the observed growth in the number of journeys was more marked than the growth in the number of urban denizens. However, the dynamic was broken up by the onset of the economic crisis in 2009. The reduction in economic activity levels and the increase in

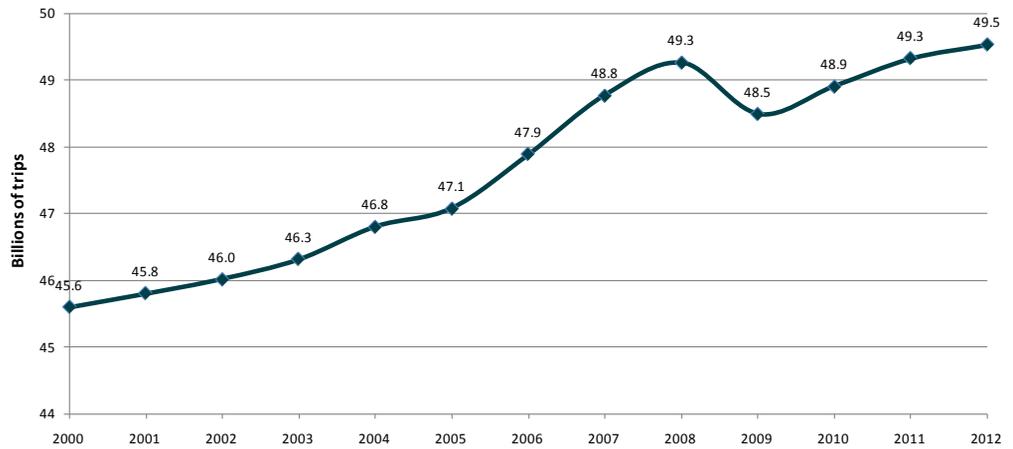


Figure 2 Local public transport journeys by bus, tram and metro in the EU, 2000 to 2012.

EU average of 132 journeys per urban inhabitant in 2012

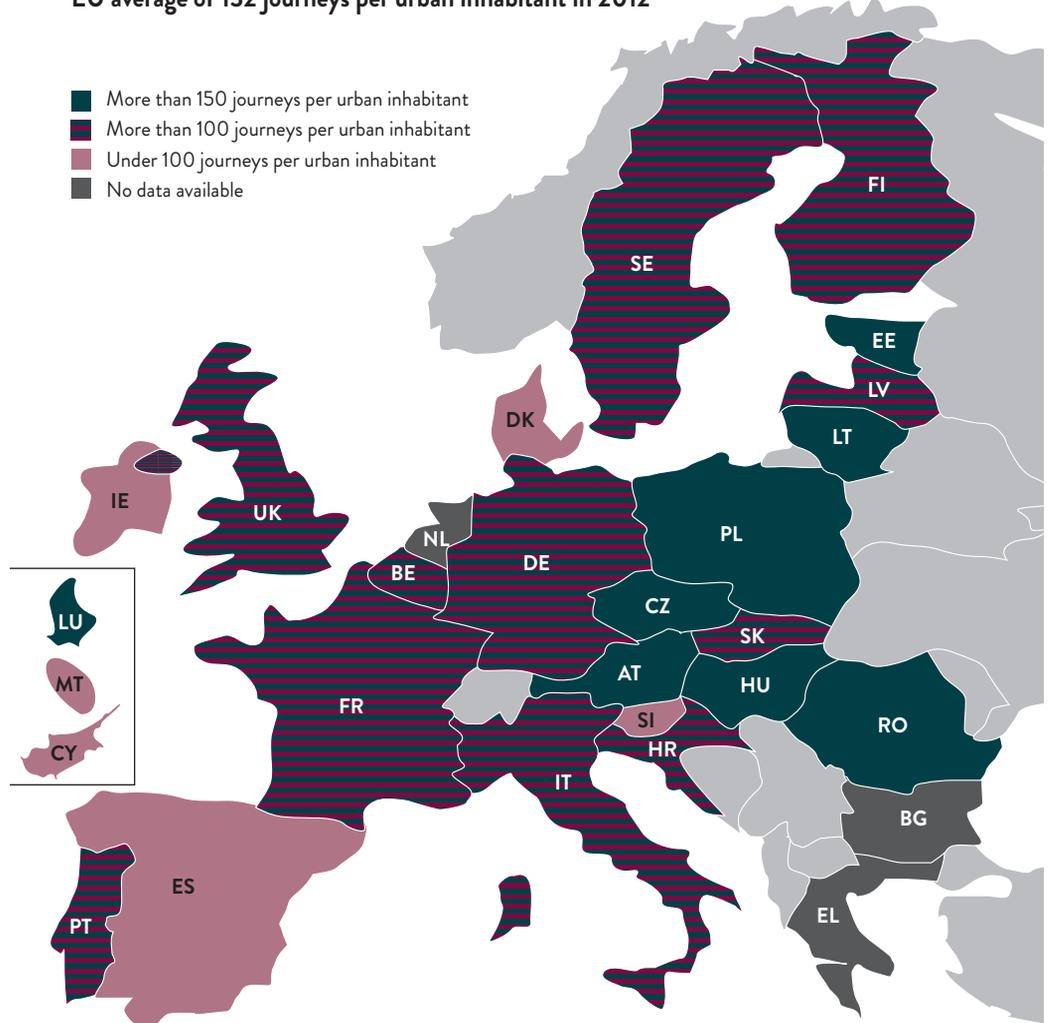


Figure 3 Local public transport journeys by bus, tram, metro, per urban inhabitant in 2012

unemployment – which reduces the overall levels of individual mobility, and consequently the demand for public transport – are the most likely factors underpinning the return to pre-2006 levels in terms of demand per urban inhabitant.

USE OF LOCAL PUBLIC TRANSPORT PER COUNTRY

To understand the magnitude of the public transport sector in the overall EU mobility landscape it is important to note that the journeys considered here most likely take place within urban settings, either for their entire length or, as in the case of suburban services, for a part of it.

The overall evolution of public transport journeys in the EU is marked by different situations and dynamics at the Member State level. Figure 3 shows different levels of demand for public transport per urban inhabitant (distinguishing 3 categories). Figure 4 shows the evolution of demand for public transport per country between 2000 and 2012.

Six of the eight countries where the use of public transport per urban inhabitant was the highest in 2012, with more than 150 journeys per capita, have joined the EU post-2000: the Czech Republic, Estonia, Hungary, Lithuania, Poland and Romania. The dynamic in these countries has

been quite typical, with demand levels decreasing in most of the ‘new’ EU Member States. National contexts, such as a historically strong public transport system, as well as economic growth coupled with fast rising motorisation rates may explain the high levels of and the drops in demand observed.

Countries with medium and relatively lower levels of demand for public transport per urban inhabitant show very diverse trajectories in the development of demand.

The national developments viewed over the 13-year period studied also show a number of interesting patterns when the yearly changes are examined.² Countries such as Austria, Belgium, France, Germany, Luxembourg, Sweden and the UK have shown relatively constant trends where the number of journeys has been improving annually. Ireland and Spain display strong increases in public transport demand in the years up to 2009, with the economic crisis disrupting the trend and causing significant drops in demand. Finland shows a somewhat opposite trend, where the demand for public transport decreased up to 2006 followed by an increase, with the total number of journeys in 2012 surpassing the 2000 figure.

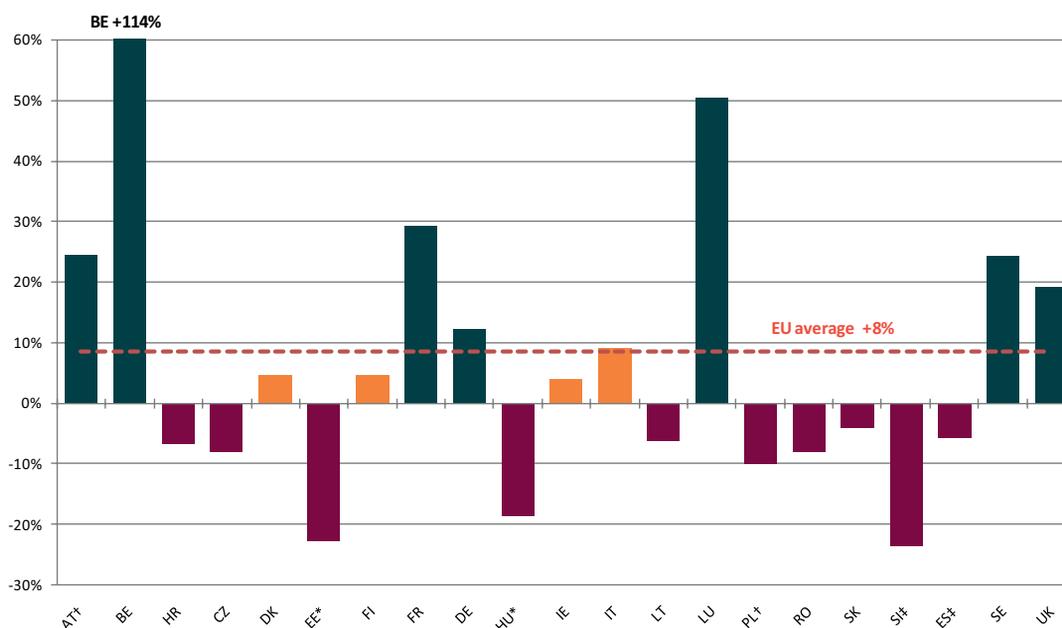


Figure 4 Change in local public transport journeys by bus, tram, metro between 2000 and 2012.
*2001-2012, †2002-2012, ‡2005-2012

Figure 5 shows how the evolution of public transport demand from 2000 to 2012 by country is underpinned by the combination of the development of urban population and the development of the number of journeys per urban inhabitant. A number of countries combine growth in urban population and in public transport demand per urban inhabitant. In these countries demand growth was the strongest (blue in figure 4 and figure

5). In some countries, the urban population dynamics makes up for the decrease in the number of journeys per inhabitant (orange in figure 4 and figure 5). For countries in purple in figures 4 and 5, the increase in urban population does not compensate for the decrease in demand per urban inhabitant, or is decreasing anyway. In both cases, public transport demand has decreased between 2000 and 2012.

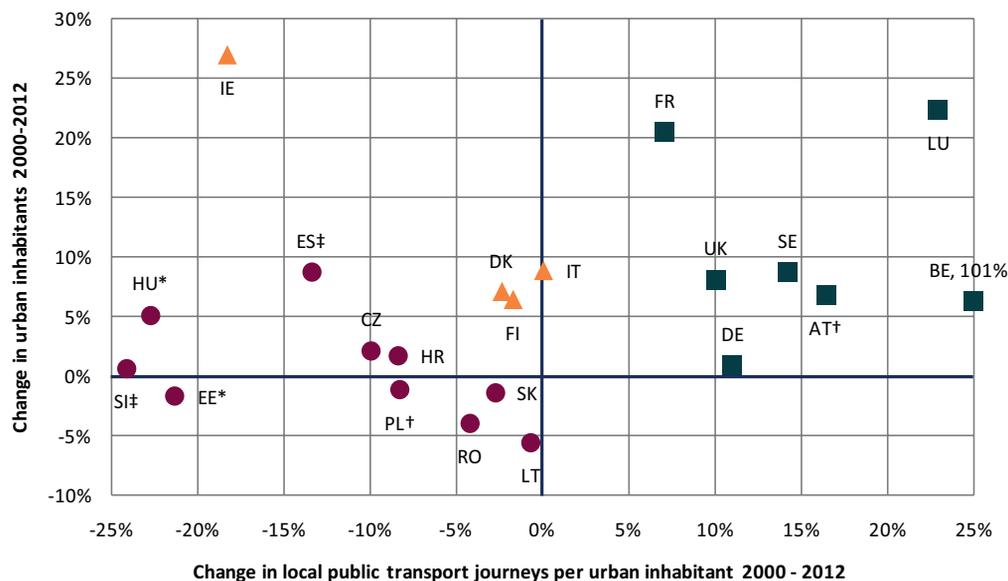


Figure 5 Change in local public transport journeys per urban inhabitant (horizontal axis) and the change in urban population (vertical axis) in EU countries between 2000 and 2012. Blue markers represent countries with an increase of more than 10% in the total number of journeys, orange markers countries with an increase below 10% in the total number of journeys and purple markers represent countries with a decrease in the overall number of journeys.

METHODOLOGY

Data for the number of journeys (defined as boarding a public transport-vehicle) by public transport is normally collected at local level by the companies operating public transport services within the urban and suburban areas, and then aggregated at national level. This report is the first attempt at collating and aggregating these data at the level of the EU as a whole. Data for local public transport has been collected in all the EU countries for the period 2000 to 2012 in order to reveal and analyse progress over more than a decade which has seen a wealth of developments in the sector. Due to the lack of data at the national and EU levels for suburban railways, this important component of local public transport has only been used for the most recent year, while progress in the number of public transport trips has been analysed for the other modes since 2000 (Figure 2).

To obtain the number of journeys per urban inhabitant, the public transport figures were divided by the number of people living in urban areas. This was extracted from the World Urbanization Prospects publication by the United Nations Department of Economic and Social Affairs (website <http://esa.un.org/unup/index.html>).

CONCLUSIONS

The relatively steady growth in demand for public transport from 2000 to 2012 in the EU as a whole is underpinned by a complex picture when considering national contexts. Some countries display significant variations in public transport demand before and after the 2009 crisis. Even though some signs of convergence between countries could be observed over the decade, the overall picture remains very diverse in terms of both levels of use and the development trajectory for public transport.

The level of demand for public transport has broadly reflected the evolution of the economic situation of Europe over the last decade. However it is likely that growth dynamics which started in the middle of the decade – and were affected by the crisis since 2009 – were underpinned by some more structural evolutions, and revealed emerging changes in mobility patterns. The analysis of the drivers of these changes is essential to support further growth of public transport demand after recovering from the crisis and to identify funding needs and healthy business models for public transport in the coming decade.

UITP data on local public transport trends in the EU

The data outlined in this document have been extracted from a database compiled by UITP. Please visit www.uitp.org for more information on access conditions.

This is a publication of the International Association of Public Transport. UITP has over 1,300 member companies in 92 countries throughout the world and represents the interests of key players in this sector. Its membership includes transport authorities, operators, both private and public, in all modes of collective passenger transport, and the industry. UITP addresses the economic, technical, organisation and management aspects of passenger transport, as well as the development of policy for mobility and public transport world-wide.

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