

EEA Core Set of Indicators - CSI 035
Passenger transport demand
May 2005 assessment

working draft

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Key policy question: Is passenger transport demand being decoupled from economic growth?

Key message: Passenger transport volume has grown close to parallel with GDP. From 1997 to 2001 transport growth was marginally lower than GDP, but in 2002 transport growth once again exceeded GDP growth. Overall the decoupling between transport demand and GDP growth has been less than 0.5% per year compared to a transport growth of 2.1% per year, and the decoupling has been inconsistent.

Over the past decade passenger transport demand has grown steadily in the EEA countries as a whole, thereby making it increasingly difficult to reduce the environmental consequences of transport. Most countries saw growth every year, but there are a few exceptions, notably Germany, where demand has remained almost stable since 1999. Also on a per capita basis the transport demand grew and reached above 10.000 km in the countries for which data is available, by 2002.

The primary underlying factor is growing incomes coupled with a tendency to spend more or less the same amount of disposable income on transport. Additional travel budget allows more frequent, faster, farther and more luxurious travelling. The average daily distance travelled by EU citizens has increased (from 32 km in 1991 to 37 km in 1999), and passenger car and aviation are the fastest growing modes of transport.

The development in passenger transport demand has been very similar to the development in GDP over the past decade. From 1997 to 2001 transport growth was marginally lower than GDP, but in 2002 transport growth once again exceeded GDP growth. Overall the decoupling between transport demand and GDP growth has been less than 0.5% per year compared to a transport growth of 2.1% per year, and the decoupling has been inconsistent.

One explanatory factor is a greater instability in fuel prices from 1997 and onwards, which may have reduced the tendency to invest in additional cars. The "fuel price protests" in 2000, albeit primarily by hauliers, illustrated the reaction. But also increasing congestion in some cities has been put forward as an explanatory factor.

EU-wide data on travel purposes is not available. However, based on national mobility surveys 40 % of passenger transport demand was for leisure in the nineties. Tourism is an important travel motive, and most of the trips attributed to tourism are long-distance trips. The importance of tourism in air traffic is stressed by the presence of Palma de Mallorca, Tenerife and Malaga in the top-20 of airports handling most passengers.

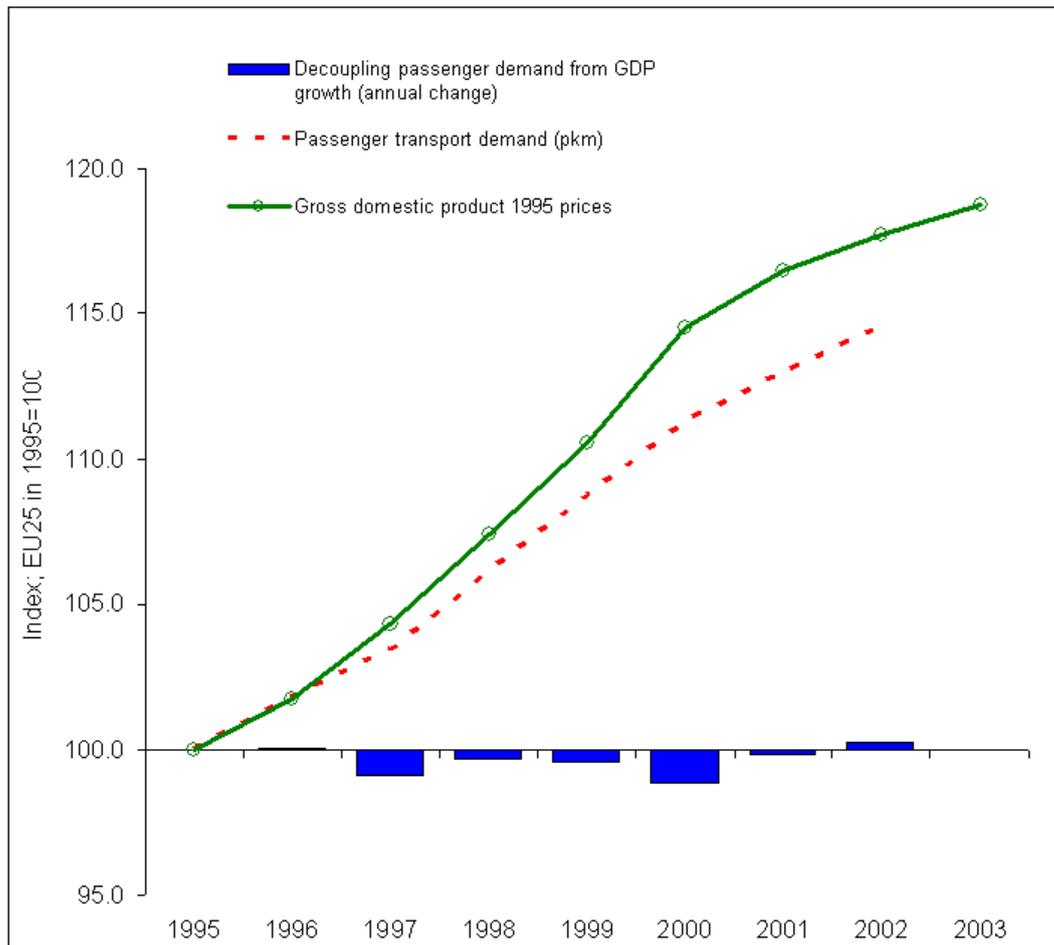
The stated objective of the Common Transport Policy of maintaining the 1998 modal shares are not presently being met. The share of car transport is stable around 72% while air transport is growing and bus + rail is declining steadily. In absolute numbers bus and rail are roughly maintaining their respective markets, but all growth falls on air and road transport.

Increasing wealth among citizens give more people the option to buy a car and use the added flexibility that it provides. Only in dense urban cores and on longer distances can public transport compete in terms of travel time.

Aviation saw a small drop in market shares following the 9-11 terrorist attack on World Trade Centre and the Pentagon, the subsequent wars and the SARS epidemic. This led to increased consolidation in the airline industry but also provided opportunities for low cost airlines, which are rapidly gaining market shares. Thus the relative cost of air travel has dropped further fuelling the growth in air travel.



Fig. 1: Trend in passenger transport demand and GDP, index 1995=100



Data source: Eurostat and DG TREN, European Commission.

Note: The unit to measure passenger transport demand is the passenger-kilometre (pkm), which represents one passenger travelling a distance of one kilometre. It is based on transport by passenger cars, buses and coaches, trains and air (EU15 only). The decoupling indicator is calculated as the ratio of passenger transport demand to GDP measured in 1995 market prices. The bars depict the intensity of transport demand in the current year in relation to the intensity in the previous year. An index above 100 results from transport demand outpacing GDP growth (i.e. positive bar = no decoupling) whereas an index below 100 is explained by transport demand growing less rapidly than GDP (i.e. negative bar = decoupling). The EU25 index for passenger transport demand does not include MT, CY, LV, LT and EE because of lack of a complete time series in these countries. Decoupling for passenger demand also excludes the GDP of these 5 countries, together representing about 0.3%-0.4% of EU25's GDP. Data for passenger transport demand is not yet available for 2003.



Specific policy question: Is the share of passenger car transport in total inland transport being reduced relative to other transport modes?

As part of the modal-split indicators project, Eurostat is working on methods regarding the calculation and territorial attribution of air passenger transport. Until such data becomes available, the core set indicator "passenger transport demand" will include an EU estimate of air transport demand based on data from the European Commission's Directorate General for Transport and Energy. The country breakdown was not available for all countries and years.

The modal split indicators are structural indicators. Total passenger transport demand currently includes cars, trains and buses/coaches (but not air). Any change regarding the methodology (i.e. possible inclusion of air passenger transport) will be reviewed and incorporated in the core set indicator as soon as Eurostat validates the data. The estimate for the EU from DG TREN would then be replaced by data from Eurostat. The (possible) inclusion of a new mode would have a dramatic effect on the modal split shares and therefore we will not publish these shares until Eurostat's finalises its work this year.