New drivers in mobility; what moves the Dutch in 2012 and beyond?

Peter Jorritsma (KiM)
Jan van der Waard (KiM)
Ben Immers (TRAIL)
Contents

• Introduction
  – Development of mobility in The Netherlands
  – Levelling off growth in car mobility
• Looking for explanations
  – 4 search directions
• Results search directions
• Conclusions:
  – Summary of findings
  – Implications for transport policy
Mobility development 1985 – 2011
Passengerkilometres
Car use in The Netherlands 1985-2011
Passengerkilometres
Four search directions:

- Influence 1: Signs of saturation?
- Influence 2: Mobility of young adults
- Influence 3: Impacts of e-society
- Influence 4: Is growth moving abroad?
Influence 1: Small signs of saturation

• Car ownership
  ✓ Still increase in NL

• Driving licence holding
  ✓ Increase in agegroup < 25 yrs. and +50 yrs.
  ✓ Small decrease in agegroup 25-29

<table>
<thead>
<tr>
<th>Number of cars / 1000 inhabitants</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Nederlands</td>
</tr>
<tr>
<td>UK</td>
</tr>
<tr>
<td>France, Japan, Germany</td>
</tr>
<tr>
<td>Australia</td>
</tr>
<tr>
<td>USA</td>
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<table>
<thead>
<tr>
<th>Decrease among young and increase among elderly</th>
<th>Increase among young and elderly</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA, Sweden, Norway, UK</td>
<td>Spain, Finland, Poland, Israel, Latvia, Switserland</td>
</tr>
<tr>
<td>Canada, Japan, Germany</td>
<td>The Nederlands</td>
</tr>
</tbody>
</table>

In red: countries with stabilising car use
Influence 2: Mobility of young adults (18-29 year)

A clear negative contribution to growth through changes in volume and behaviour
Influence 2: Mobility of young adults (18-29 year)

Changes in behaviour: changes in # trips and trip length
Influence 2: Mobility of young adults (18-29 year)

- Declining group size
  - 1995: 18% of population; 20% of car mobility
  - 2011: 15% of population; 14% of car mobility

- Slight drop in drivers license holding
  - 74% in 1995 => 71% in 2009

- Slight drop in car ownership
  - 32% in 1995 => 30% in 2009

- Number of students “up”
  - 610,000 in 1995 => 880,000 in 2009

- Number of workers “down”
  - 1,7 mln. in 1995 => 1,3 mln. in 2009

- Increase in young people living in high density urban areas
  - In high density urban area shift towards bicycle and PT
  - In rural areas absolute reduction in mobility
Example: modal split Amsterdam relations

- Bicycle more and more important in the city
- Public transport for longer distances
- Car is losing its mode share
Influence 2: Mobility of young adults

- **Gartner:**
  - “I’d rather have access to the web than a car of my own”
    - 48% in category 18-24 year
    - 15% in Baby Boom generation
- In our focus group experiment we found no apparent shift in focus from car to smartphone/tablet
- Car still has a high status among young adults (focus group)
Influence 2: Mobility of young adults

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Is increased use of IT for activities, a factor influencing the reduction in car use
Influence 3: e-society

• The Nederlands is frontrunner in Europa for internet connections
• Frequency in internet use is high, also by mobile devices
• Possibilities change quickly through mobile internet; individuals become ‘footloose’ (Smartphone, Tablet)
• A strong decrease in physical mobility is expected as a result of a strong increase in digital communication.
• However......
  • In reality impacts of e-activities are not limited to changing physical trips into virtual trips (substitution)
  • Generation effects occur
  • Existing research has a strong focus on substitution, resulting in little knowledge about the net effects.
Influence 4: Is growth moving abroad

Dutch leisure mobility grows wings

- Little change in short leisure trips abroad by the Dutch
  - Growth in trips by plane
- Strong increase in holiday trips (4 days or more) by the Dutch
  - Clear shift from car to plane, also in Europe
- Total number of trips is limited
Summary of results

Contributions to levelling off of car use:

- Signs of saturation? Car ownership/ drivers licence
  - Limited contribution;
- Mobility of young adults: reurbanisation/drivers licence/ car ownership/ more students
  - Substantial contribution
- Impacts of e-society
  - Possible contribution; not to be determined; more research needed
- Is growth moving abroad?
  - Limited contribution; not a relevant trend
Thank you for your attention

Web: www.kimnet.nl

Phone: +31 (0)70-456 1965
Traffic on main road network 1985-2011
Vehiclekilometres
Influence 2: Mobility of young adults (18-29 year)

- **International perspective:**
  - PT-share is relatively low, but high for students
  - Cycling is already very important

<table>
<thead>
<tr>
<th>MODE CHOICE</th>
<th>Main mode</th>
</tr>
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</table>
| Walking 20 | Nederland 2006
| Walking 18 | Sweden 1999
| Walking 27 | Austria 1995
| Walking 25 | UK 2004
| Walking 21 | Duitsland 2002
| Walking 12 | “Australia” 2006
| Walking 7 | “USA” 2006

- Bicycle
- Motorbike
- Car as driver
- Car as passenger
- Public transport
Influence 3: e-society

- Anticipated impacts from different types of e-activities

<table>
<thead>
<tr>
<th>Type of E-activity</th>
<th>Substitution</th>
<th>Neutrality</th>
<th>Modification</th>
<th>Generation</th>
<th>Efficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-working</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Business to Consumer E-commerce</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Consumer to Consumer E-commerce</td>
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<td></td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td>Internet banking</td>
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<td></td>
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<tr>
<td>E-conferencing</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Leisure time spent on Internet</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
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</tbody>
</table>
Implications for transport policy development

• The need to deal with an even more uncertain future
• More policy attention for groups
• Changing travel patterns require a more robust transport system
• Focus on re-urbanisation