Ministry of Infrastructure and the Environment

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

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  - Levelling off growth in car mobility
- Looking for explanations
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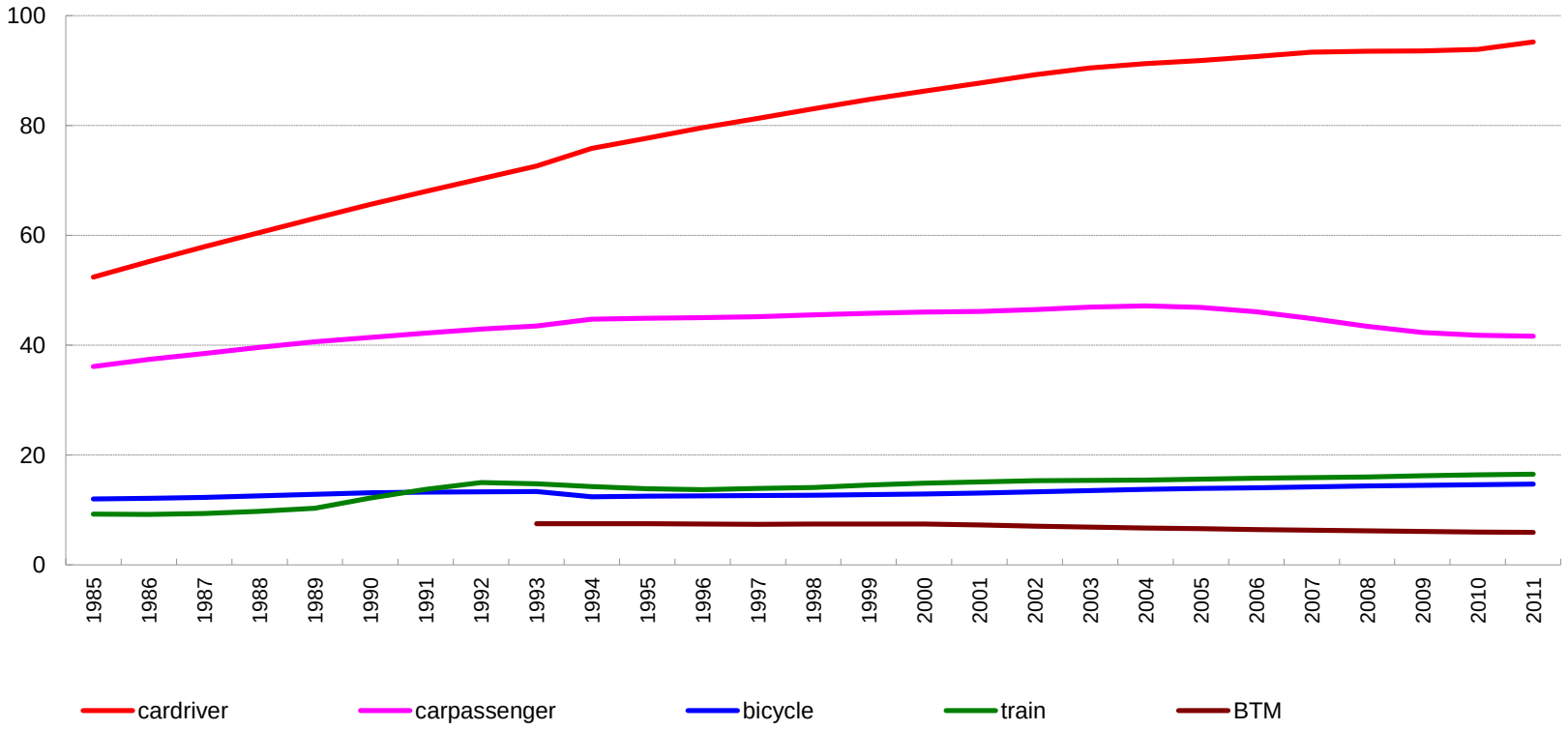
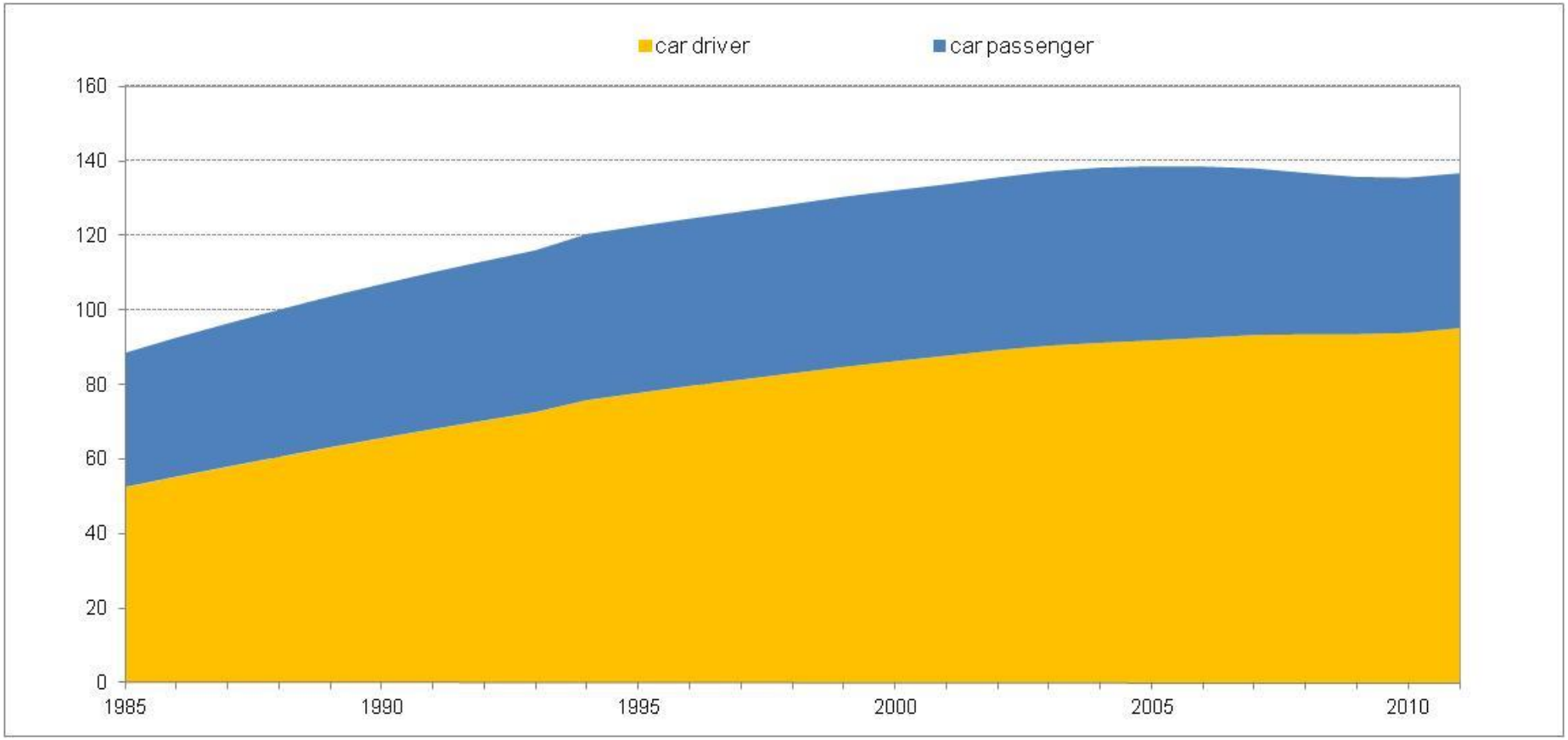
Mobility development 1985 – 2011

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

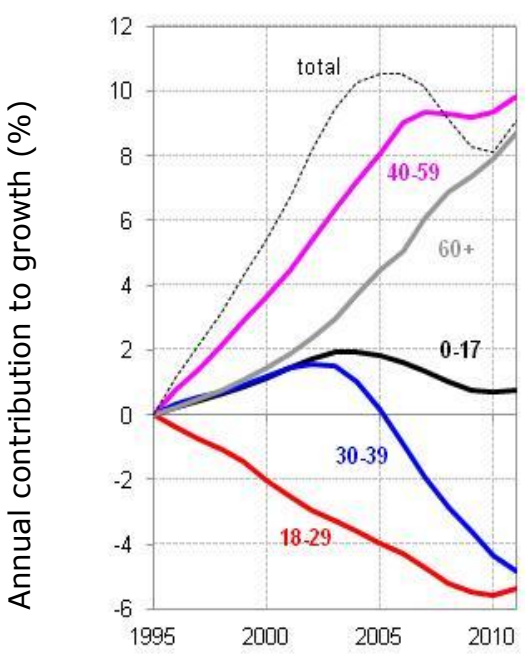
Number of cars / 1000 inhabitants	
The Nederlands	420-500
UK	500
France, Japan, Germany	600
Australia	700
USA	800

Decrease among young and increase among elderly	Increase among young and elderly
USA Sweden Norway UK Canada Japan Germany	Spain Finland Poland Israel Latvia Switserland **The Nederlands**

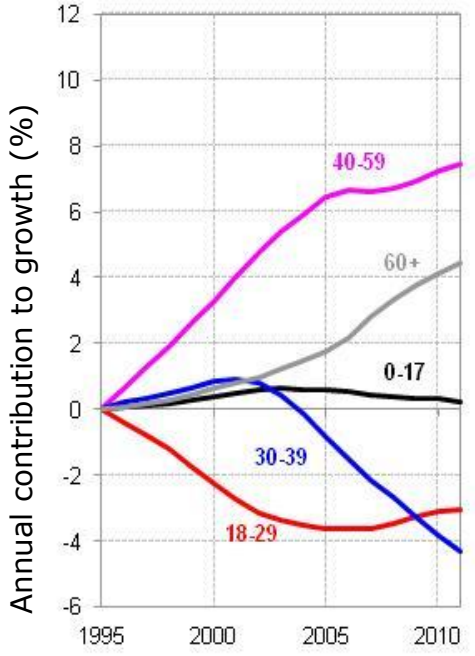
In red: countries with stabilising car use

Influence 2: Mobility of young adults (18-29 year)

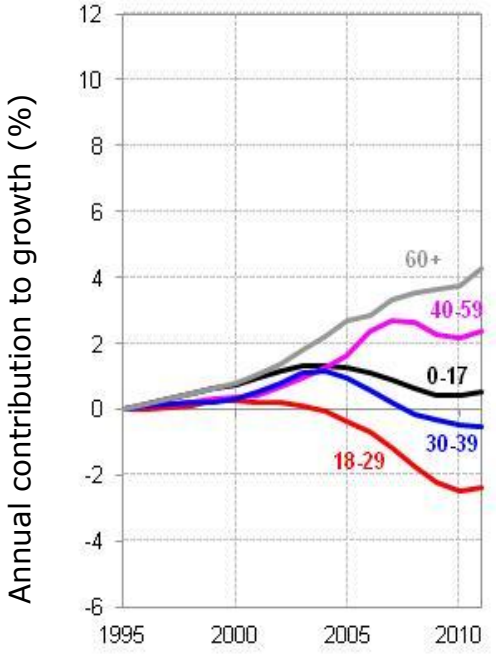
A clear negative contribution to growth through changes in volume and behaviour



Contribution to growth (pass + driver)

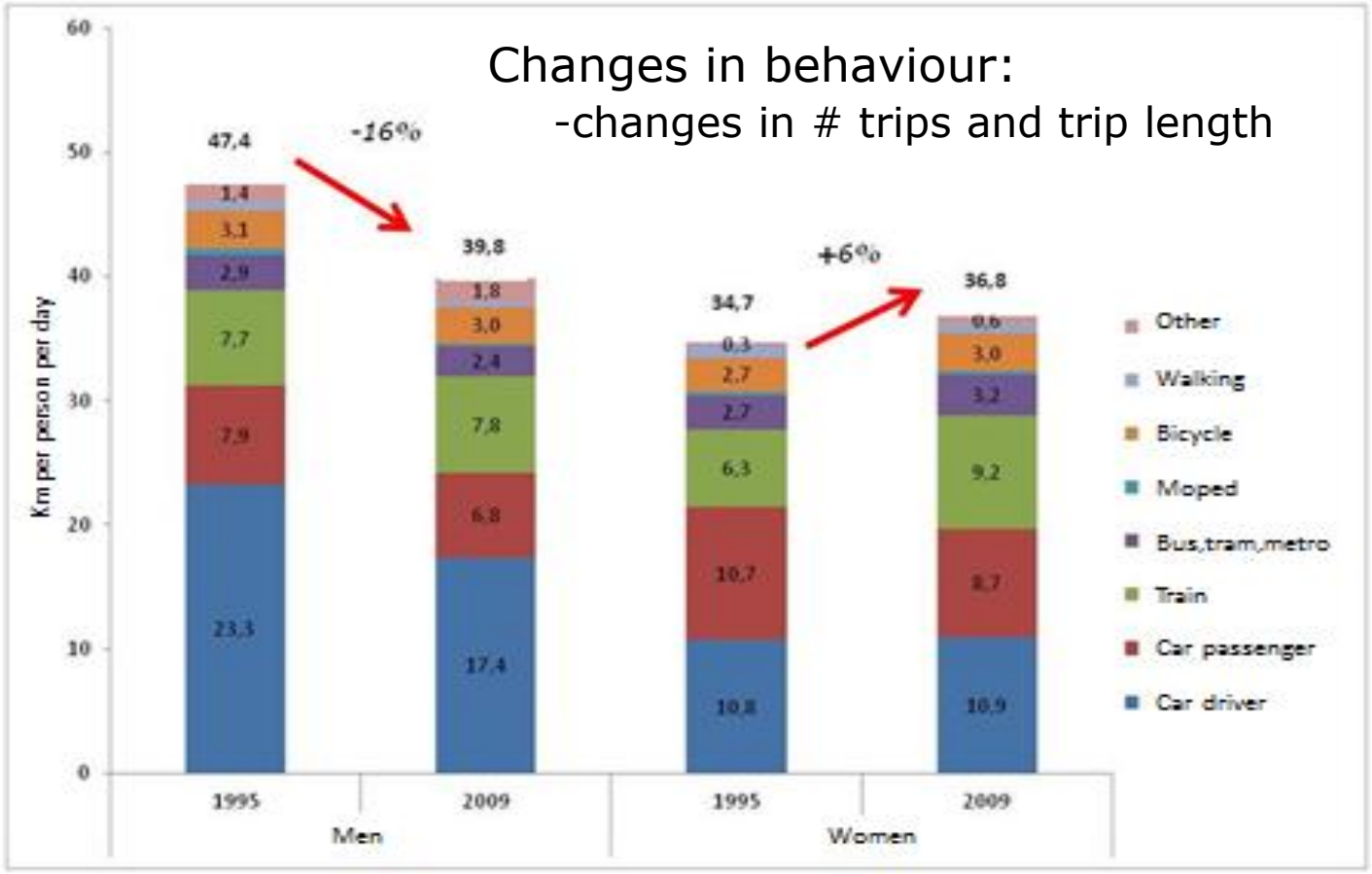


as a result of changes in group volume



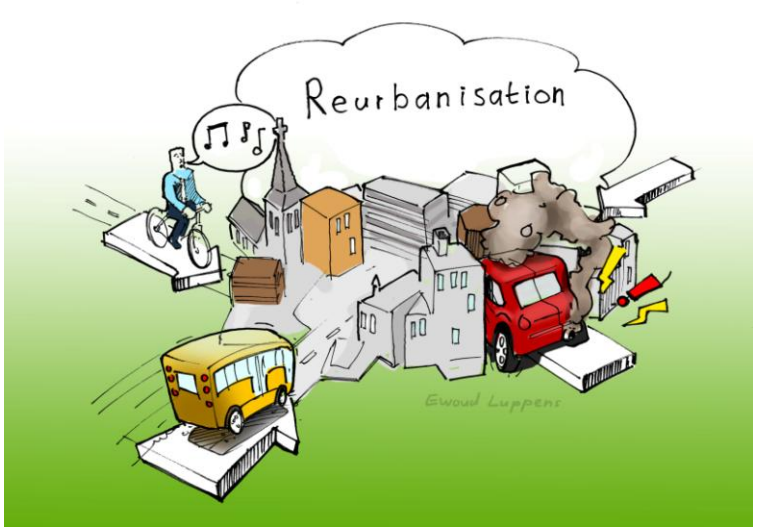
as a result of changes in group behaviour

Influence 2: Mobility of young adults (18-29 year)

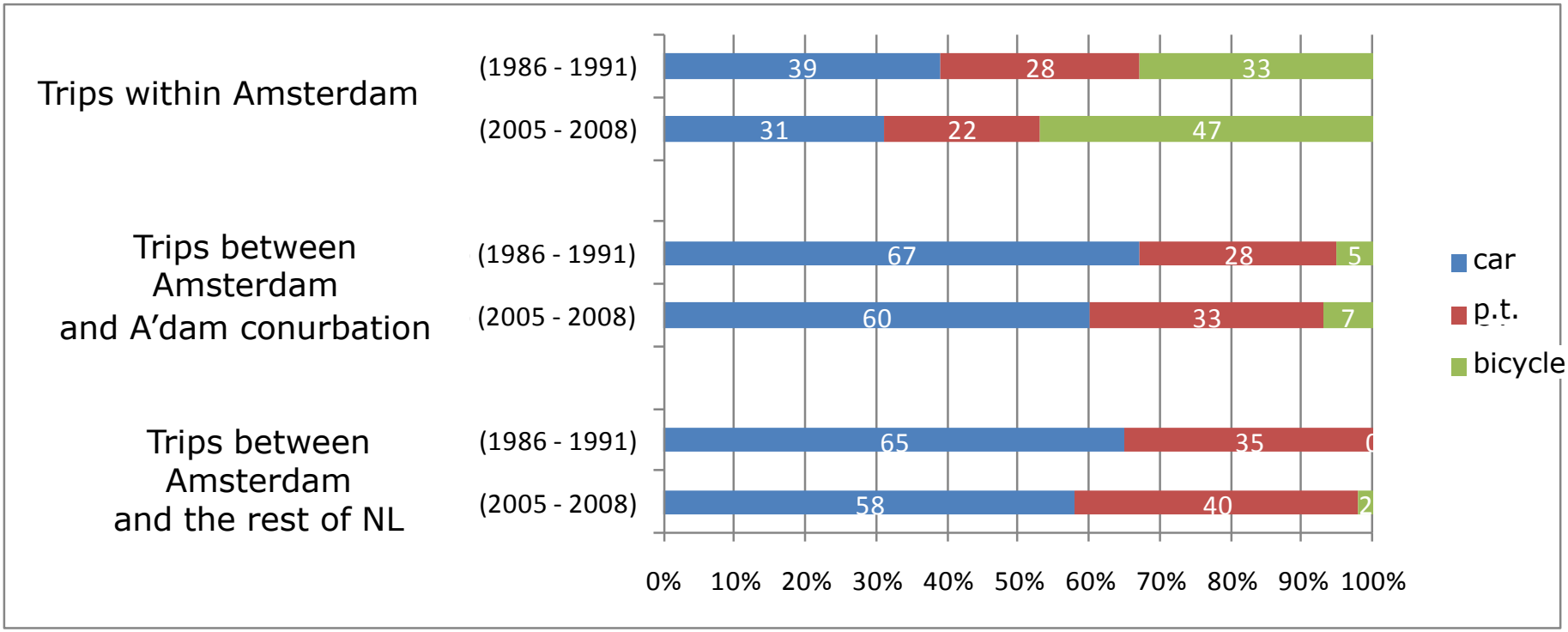


Influence 2: Mobility of young adults (18-29 year)

- 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)

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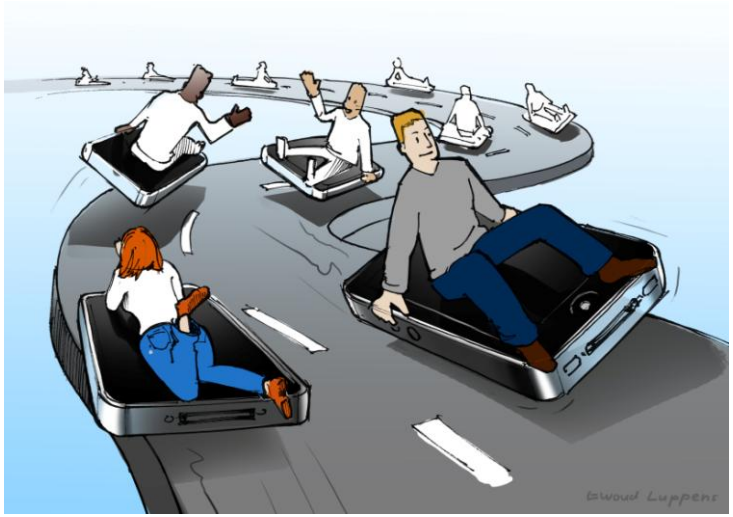
Is increased use of IT for activities, a factor influencing the reduction in car use



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

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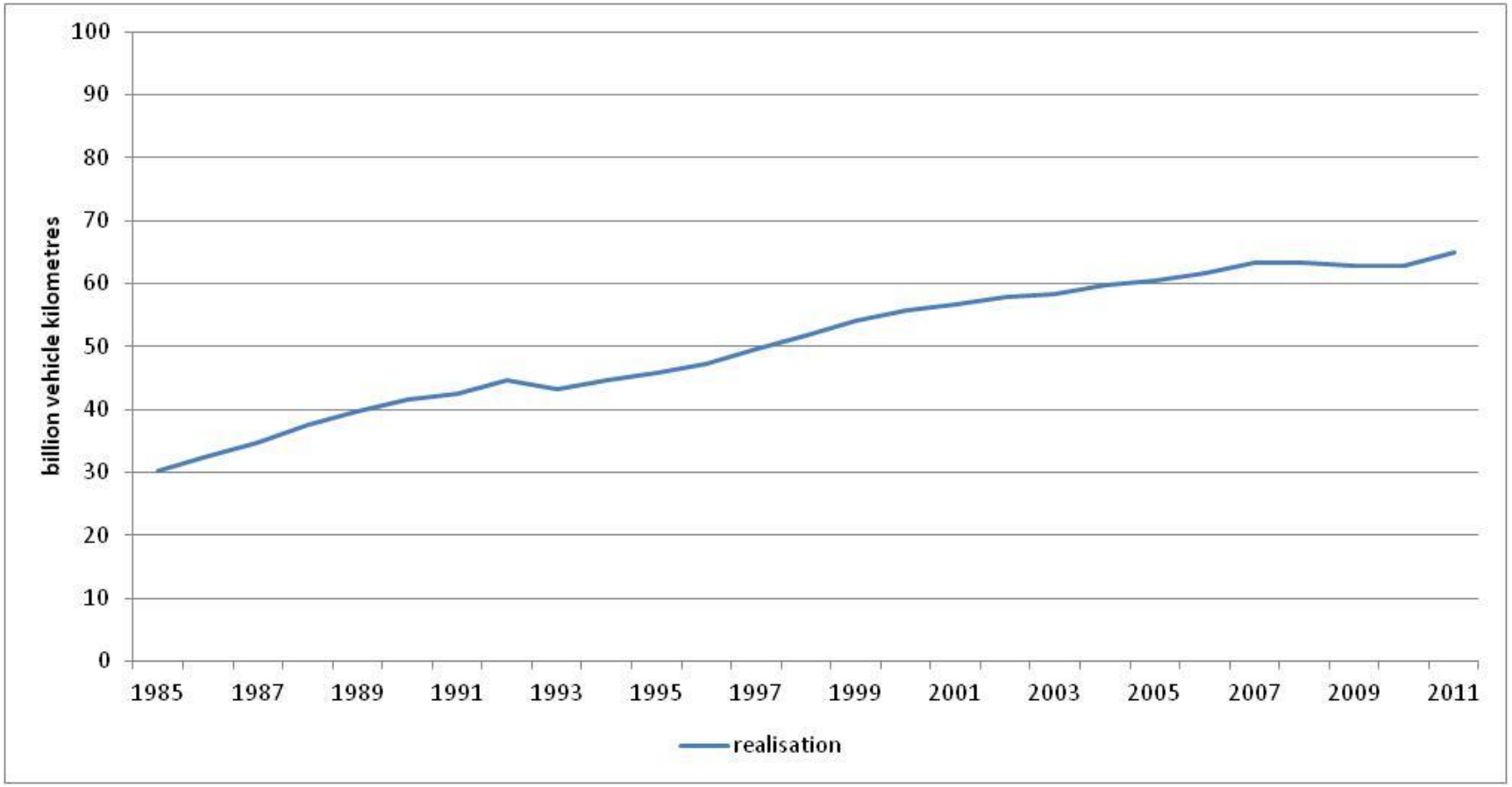
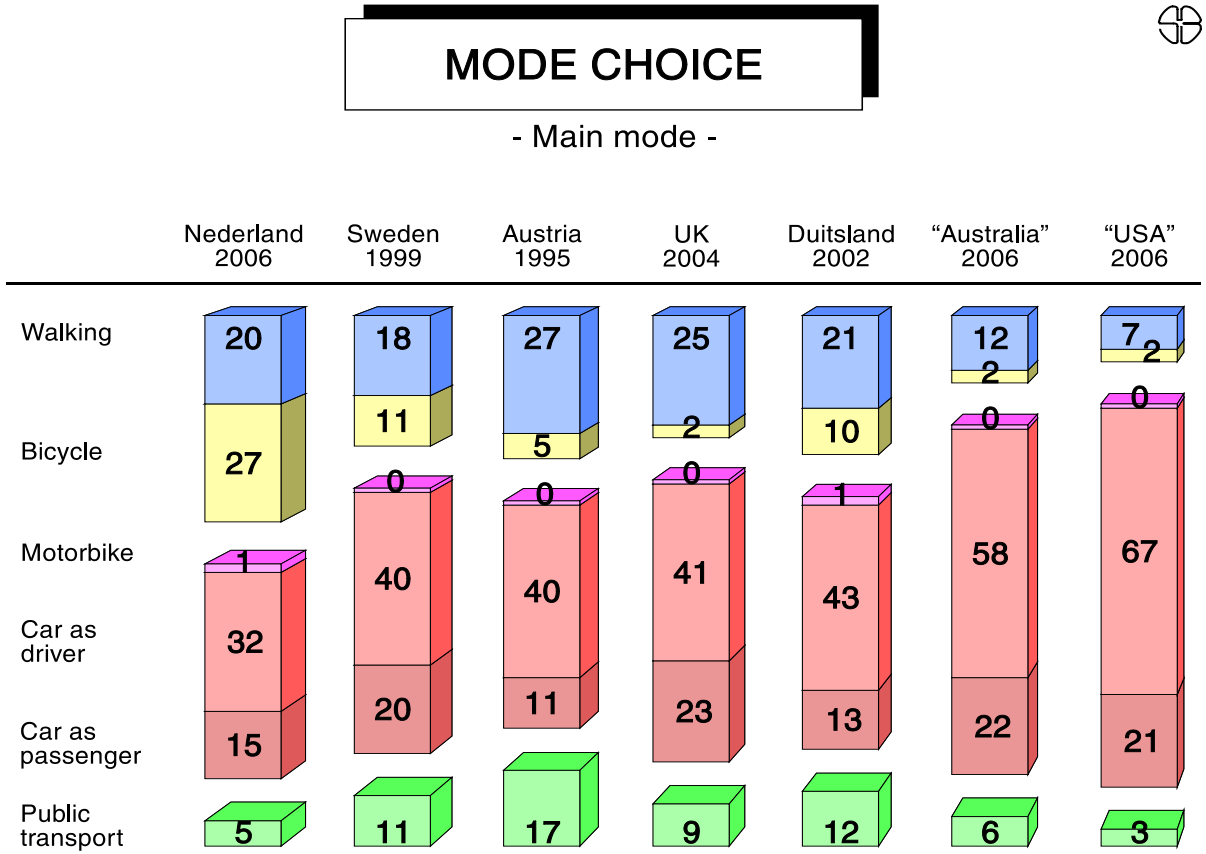
Traffic on main road network 1985-2011
Vehiclekilometres



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



Influence 3: e-society

- Anticipated impacts from different types of e-activities

Type of E-activity	Substitution	Neutrality	Modification	Generation	Efficiency
E-working	X		X	X	
Business to Consumer E-commerce	X	X	X	X	X
Consumer to Consumer E-commerce	X			X	
Internet banking	X				
E-conferencing	X	X		X	
Leisure time spent on Internet	X		X	X	X

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