

## PTV Group

# What moves public transport?

Public transport increases the quality of life in cities, links the surrounding regions and is a competitive factor for local industry. It would be unimaginable if public transport were to disappear from daily life. In Germany alone around ten billion passengers use bus and rail services every year. And the trend continues. Nevertheless industry participants expect changes. These have been determined by the PTV Group in the "Perspective – Public Transport" industry survey in the last quarter of 2012.

Around 300 participants from around the world took part in the survey, of which over 200 were from Germany, Austria and Switzerland. This White Paper presents the global results.

International climate policy has increasingly gained importance over recent years. The political arena determines this more than nearly any other issue.

One current cause is the recently extended Kyoto Protocol. This obliged industrial nations to reduce greenhouse gases by at least 5% between 2008 and 2012. This effort has a very strong effect on the need for action in public transport. Therefore, the majority of those surveyed (81%) believe that fewer resources and climate change is the biggest industry driver. 50% state that this issue is a strong driver.

Transport operators and consulting and engineering offices in particular see important issues around "green concepts": Among transport operators a good 84% state that fewer resources and climate change would drive future public transport; among consulting and engineering companies it was as much as 86%.

## Green concepts are important

Over half of those surveyed (72%) are working on more efficient vehicle utilisation. Optimised schedules came in second place (61%). The use of environmentally friendly vehicles, such as solar buses or hybrid vehicles

that combine combustion engines and electric motors, came in third place (58%). Some transport operators are also focusing on green electricity and the production of renewable energies on platform roofs. Those surveyed also emphasise that they are dealing intensively with networking various transport modes, and with the help of modern and mobile services, are reducing the access barriers for potential public transport customers. Intensive dialogue marketing and creating interfaces between public transport and urban mobility, e.g. car and bike sharing, were stated repeatedly here.

## The influence of demographic change

The integration of car and bike sharing schemes is also important when dealing with the burning issue of "demographic change". It is believed that this could lead to a much smaller but better utilised bus network in rural areas. In total 80% of survey participants believe demographic change is very important for the future of public transport. Of these 45% believe it will have a strong effect.

Transport associations and authorities in particular see the need for action on this point. They unanimously state that this issue is a driver for future public transport. Half of the transport associations state that it is a strong driver; for transport authorities it is as much as 67%.

## A look at the statistics

According to the United Nations, in 2010 the global population was around 7 billion people; children and young people (up to and including 14 years) made up around 26%. In 2020, approximately one in six will be in this age group. In comparison, three years ago the 60+ age group represented 12% and this will rise to 15% as early as 2020.

Fewer children, fewer pupils. This development has consequences: In many regions school transport is the backbone of local public transport. If it collapses the transport operators and associations will lack an important demand driver and therefore also a source of revenue. They will therefore be forced to develop new, sustainable concepts.

## Consequence of disappearing pupil numbers

Existing connections will have to be analysed and the line network will have to be optimised – according to 67% of survey participants. 40% estimate that the revenue situation will deteriorate further. The lower number of pupils and the fact that they have to travel greater distances will cause problems. In addition, the transition phases would be cost critical as instead of direct closures school changes would be implemented gradually. 27% believe that the fall in pupil numbers would have no effect on them. "The oldies are coming but also the young ones and the low earners," writes one survey participant.

There is a clear trend to this question: Making the public transport offering more flexible and adding to it. 77% consider such concepts as needs-oriented transport to be a suitable solution. A good quarter of those surveyed have already complemented their offering with alternative service forms

## WHAT IS THE KEY ISSUE

### THAT WILL DRIVE PUBLIC TRANSPORT IN THE FUTURE?



Worldwide key issues of public transport.

such as dial-a-ride transport vehicle (e.g. buses or taxis) and around one in ten is already offering demand-responsive operations such as on request by pressing a button at the bus stop or stopping on request. One in five is planning to implement the latter in the next five years.

37% are in favour of introducing a demographically corrected factor for the calculation of compensatory payments in pupil transport. 35% believe it is necessary to modify the fares as a result of the rising cost pressure. New pricing models could contribute to long-term customer loyalty. One idea here would be to introduce a levy-funded citizen's ticket using the student term ticket as an example.

## Necessity of financial improvements

The survey participants make it clear that they are intensively considering the ability to finance the public transport system and are demanding improvements to transport policy. So the majority of those surveyed (73%) would like a clear definition

and financing for the basic supply. Around half (45%) express an interest in upgrading the local transport plan as an effective control instrument. 41% demand greater transparency in terms of tasks and responsibilities of the organisation as well as financing. They believe that the existing town/network/state structures should be tested. Overall those surveyed would like to have more options for innovative approaches. So there should be clear political support for appropriate environmentally-friendly systems such as "Personal Rapid Transit" (PRT) and legal protection for car sharing schemes as an integral part of the local transport offering.

## Improvement of passenger information

Over half of survey participants (70%) consider improvements to passenger information to be appropriate. 61% are in favour of the wider use of low-floor vehicles and the introduction or expansion of fare schemes for the elderly.

This is closely followed by stop design which takes the needs of the elderly population into consideration. In addition, many are calling for marketing aimed at this target group, such as cooperation with shopping and leisure organisations.

Innovative technologies could also contribute to increasing the attractiveness of the offering: 70% see great potential for real-time information via mobile phones and the internet, 61% in e-ticketing and the use of smart cards.

Real-time information even inside vehicles on stops and other connections at the next stops as well as integrated information on other urban mobility options are high up on participants' agendas.

94% modify their network or offering at regular intervals - mainly reflecting the desire to respond the requests and suggestions of passengers (54%). Only 26% of such changes result in a reduction in offering.

The most frequently used software for strategic planning is the PTV Vision transport planning software. ■