

Why do travellers in Europe  
change transport mode?

Facts and implications  
for policy and providers

Results of the EU-funded project USEmobility:  
'**U**nderstanding **S**ocial behaviour for **E**co-friendly  
multimodal **m**obility'

## Contents

Why do travellers in Europe change transport mode? . . . . .	3
USEmobility insights – opportunities for change . . . . .	4
Implications for stakeholders . . . . .	8
Working with USEmobility: targeting travellers . . . . .	12



### Disclaimer statement

Any opinions expressed in this document are those of the USEmobility consortium and do not necessarily reflect the views of the European Commission.

### Publisher

Clean Air Action Group (CAAG) – President: András Lukács – Hungary, February 2013  
■ **Picture credits:** Ante Klečina (p 2, 3, 4, 6, 7, 8, 12), ©iStockphoto.com/VILevi (1), Ferenc Susánszky (p 5,6,10), Judit Varga (p 11)

### Project Coordinator

Mrs. Jolanta Skalska  
Allianz pro Schiene e.V. ■ Reinhardtstraße 18 ■ 10117 Berlin ■ Phone: +49 30 2462599-61  
■ e-mail: jolanta.skalska@allianz-pro-schiene.de

### Funding Scheme

The project is funded by the European Union's Seventh Framework Programme



Consortium USEmobility is conducted by a consortium of 7 partners from 5 European countries



## Why do travellers in Europe change transport mode?

### Facts and implications for policy and providers

Mobility begins in the mind – and there is a great deal of movement going on there. The EU-funded project ‘Understanding Social behaviour for Eco-friendly multimodal mobility (USEmobility) analysed the individual reasons that lie behind selecting a mode of transport. USEmobility surveyed citizens in six European countries (Austria, Belgium, Croatia, Germany, Hungary, and Netherlands) who have modified their mobility mix in the last five years.

The project’s results contribute to better understanding the reasons for changes in the modal choice. The insights gained will help **decision makers in politics**, as well as in **transportation companies**, to develop a transport system that motivates more people to opt for public transport and multimodal combinations. At the same time, better understanding the reasons for change provides valuable support for **civil society organisations** willing to take action in the field of sustainable transport.

USEmobility focused on regional and local mobility because short- and medium-distance travel is the biggest part of people’s daily mobility. On the question of what actually motivates people to use eco-friendly modes of transport, particularly public transport and multimodal transport chains, more intensively, the USEmobility project has come up with a range of interesting new insights.



*In 2011, the USEmobility survey contacted a representative sample of 12,900 citizens on a national level in six European countries (Austria, Belgium, Croatia, Germany, Hungary, and Netherlands). Those participants who had modified their mobility mix in the previous five years were surveyed about their motives (over 6,000 ‘swing users’). Additionally, a further 4,075 ‘swing users’ were interviewed on a regional level in 10 best-practice regions in the six surveyed countries.*

*Altogether, the USEmobility survey questioned over 10,000 ‘swing users’ about the reasons behind their modal choices.*

*The USEmobility insights are very similar in all project countries, suggesting that they are also applicable to other European countries that did not participate in the project.*

## USEmobility insights – opportunities for change



### Dynamism in modal choice – many ‘swing users’

In choosing their mode of transport, users behave far more dynamically than one would expect when examining today’s modal split, which appears to be rather static. Almost half of the people contacted during the USEmobility survey said that they had modified their mobility mix in the last five years. This means that already today, half of all people belong to the group of so-called ‘**swing users**’, who switched from the car to public transport or vice versa. The expression ‘swing users’ includes both, people who have completely changed to another mode of transport, as well as travellers who have altered the weighting within their mix of multiple transport modes (‘mobility-mix’). This result shows that there is a lot of dynamism in people’s choice of transport mode. For practical purposes this insight is of great importance: Where there is a great deal of movement, there is also the opportunity for policy makers and transportation companies to motivate travellers to decide in favour of public transport.

### Openness to multimodality

Multimodal combinations are a sensible solution where there is no direct access to public transport services. For bridging the ‘last mile’ (or ‘first mile’ respectively) users can combine line-bound public transport services with other modes of transport, like bike, e-bike, hailed shared taxis or private car. Thirty percent of swing users are aware of the advantages of combining multiple modes of transport for a journey and use multimodal chains. A further forty percent of swing users decide as the situation arises which mode of transport suits their purpose. Choosing one’s transport mode increasingly becomes a dynamic case of opting for ‘both – one as well as the other’, and not so much a case of ‘either/or’. For the majority of swing users, **multimodal travel** is already a reality. Overall, the change to public transport is by no means always due to a person’s not owning a car.

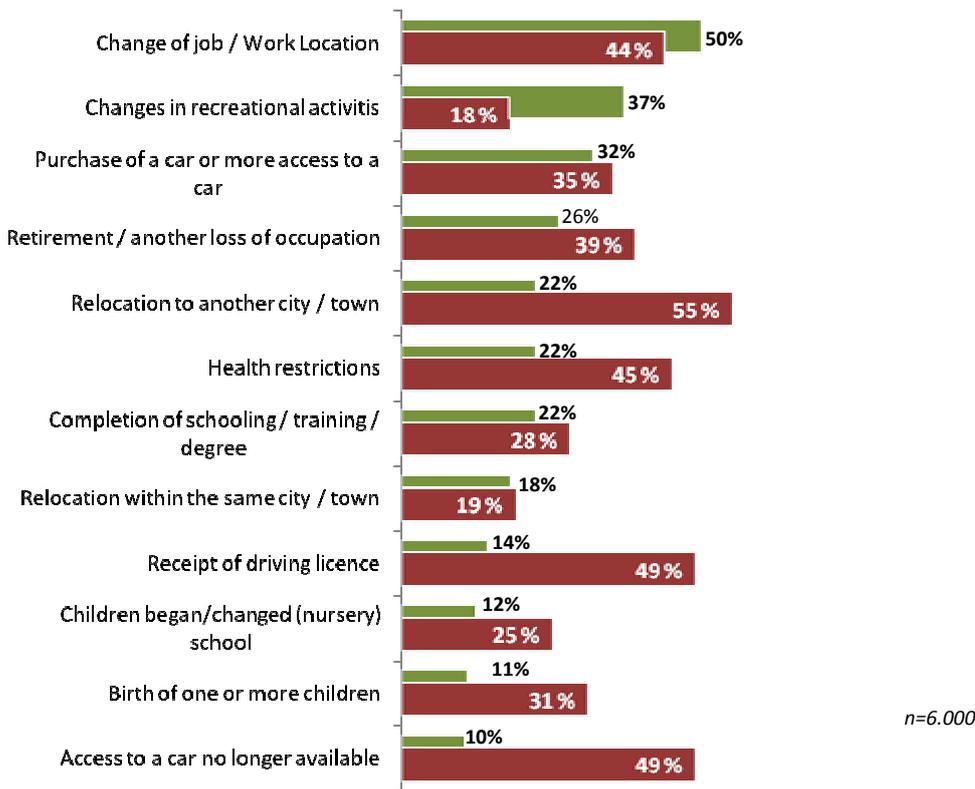
### Changes in personal situation trigger shifts in the mobility-mix

A new and surprising insight of the USEmobility project is how strongly **changes in people’s personal situation** influence changes in their choice of means of transport. Over half of the survey participants stated that change in their personal situation (relocation, a new job, birth of children etc.) was



Occurrence and importance of factors related to the personal life situation

Occurrence of changes in personal situation (■)  
Decisive influence (■)



a central motive for the process of reorientation. Such changes in life circumstances relevant to the choice of transport mode do happen frequently. Greater consideration and individual attention shown towards people in a situation of change will, therefore, offer transport policy-makers as well as providers of transportation services, a good opportunity to attract new customers to public transport or multimodal combinations, especially where there are already well developed public transport services on offer.

More pragmatism than expected

For users, the decision to change is based on their own personal background and attitudes. Looking at swing users’ attitudes towards mobility, it is interesting to see that in all USEmobility countries mobility pragmatists comprise a considerable segment within the swing users. On average more than a quarter of swing users take a pragmatic point of view when choosing their mode of transport. It is interesting to see that in all USEmobility countries

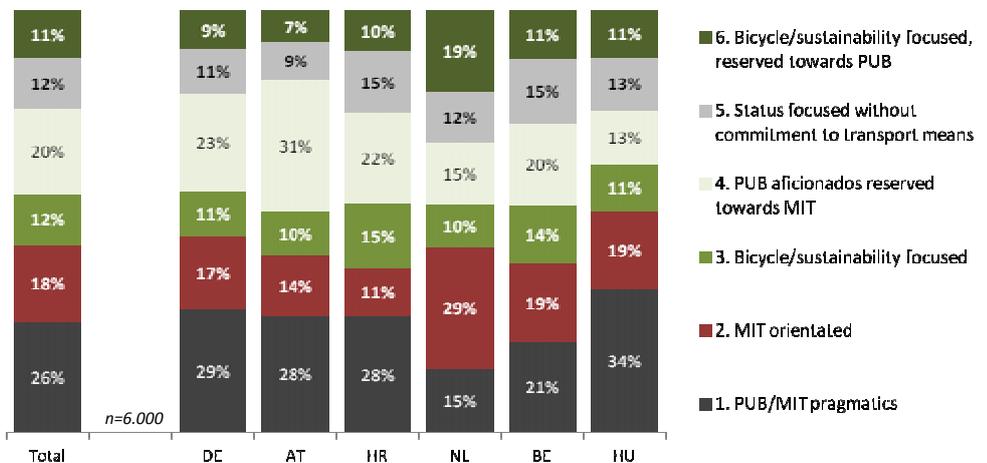
*“The focus of USEmobility is much broader than many known studies, since it worked out the importance of the reasons for change. People changing their life situation are ready to think about their mobility patterns and alternatives.” Christoph Djazirian, Head Strategy Passenger Transport DB AG (German Railways).*





(except the Netherlands) pragmatic swing users cover a considerably bigger segment than the group of clearly car oriented swing users. Further important segments cover the advocates of public transport, and swing users who attach importance to sustainability. Where there is great openness to public transport and multimodality there is also the opportunity for policy makers and companies to influence people’s choice in favour of public transport.

### Attitude-based segmentation of swing users



(PUB = public transport; MIT = motorised individual transport)

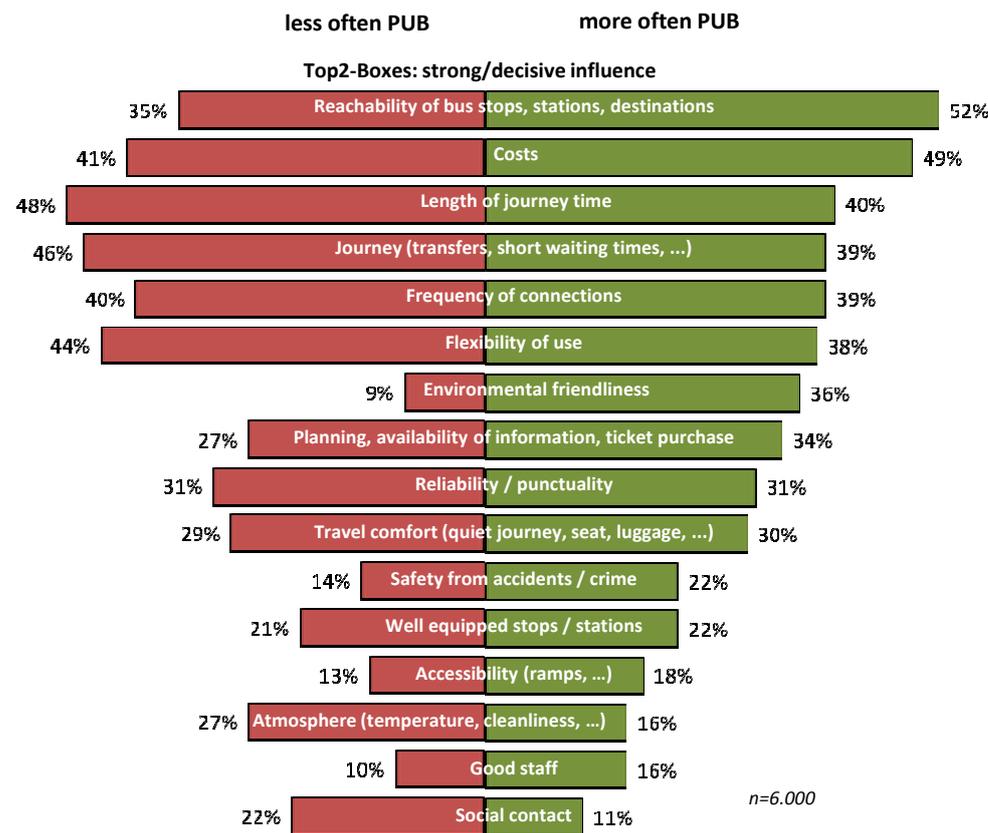
It is clear that besides users’ attitudes, life situations and socioeconomic background (so-called user-related factors), further aspects are relevant to modal choices. In fact, the decision in favour of or against a certain means of transport is complex. Swing users usually indicate a mix of several factors in combination as relevant for their behavioural change. Of decisive influence in this respect are offer-related factors (the characteristics of the available transport alternatives), as well as the impact of transport policy on people’s modal choices (so-called policy related factors).

### Characteristics of public transport offer: pull-in and push-out effects

The USEmobility survey has revealed that classical ‘hard’ offer-related factors influencing the modal choice have the highest decision relevance in both the decision to use public transport and multimodality more often and, on the contrary, to quit public transport. Hard factors include reachability, costs, journey time, waiting times, number of transfers and the frequency of connections.

The influence of so-called ‘soft’ offer-related factors is less pronounced than the influence of ‘hard’ factors, but still considerable. Among the soft factors, flexibility, planning effort, availability of information and environmental friendliness have the highest relevance, followed by comfort of travel, atmosphere on the journey, and staff. Soft factors like atmosphere or social contact are more often a reason to leave than to enter public transport. This means that soft factors, with exception of environmental friendliness and travel comfort, do not usually work as strong pull-in factors alone. They rather have the character of a booster, if hard factors generally meet swing users’ expectations. However, in case of poor performance, they can have a strong push-out effect. Therefore they should be taken seriously.

### Importance of selected push-out and pull-in factors concerning public transport



(PUB = public transport)

The comprehensive USEmobility report

‘Factors influencing behavioural change towards eco-friendly multimodal mobility’ can be downloaded here: [http://usemobility.eu/sites/default/files/resources/usemobility\\_wp3\\_d3\\_6\\_v2b.pdf](http://usemobility.eu/sites/default/files/resources/usemobility_wp3_d3_6_v2b.pdf).



*“I don’t know a comparable study in the United Kingdom.” Frank Klingenhöfer, Intergroup Relationship Director, Arriva UK Trains.*

## Implications for stakeholders



*“The findings of the USEmobility survey designate directions to keep the passengers, and to get new passengers who intend to switch transport mode. These are very useful for professionals who work on service improvement.”*  
*Imre Perger, Consultant, MÁV-START Railway Passenger Transport Co., Marketing and Service Development Department.*

The USEmobility survey has shown a lot of dynamism in people’s modal choices, but also that movement towards and away from public transport is still nearly balanced. This means: there is no automatism leading to a higher share of eco-friendly multimodal mobility. In fact, all players involved should take action.

Based on the project’s results, USEmobility has formulated **strategic recommendations** addressing various stakeholders: **decision makers in politics, the European Commission, providers of transportation services and civil society organisations.**

These strategic recommendations are focusing on the main areas of action, and are of a general nature, which means that they are transferable and applicable to a variety of situations, countries and regions, as the given status quo (exact constellation of stakeholders and their respective levels of authority, legal framework, financial potentials, available infrastructure, technical situation, level of public transport services etc.) differs considerably from country to country.

The strategic recommendations are intended to help stakeholders to recognise opportunities in their own country or region, and to inspire them to work out a strategy for user-oriented development of the public transport system, and therefore to foster eco-friendly multimodal mobility.

### Providers of transportation services: Seize the chance for more customers

The areas of action most relevant to providers of transportation services are the characteristics of the services offered and taking into account the travellers’ personal background.

Transportation companies aiming at more passengers and a higher market share for public transport and multimodality, should work systematically on both attracting new customers for public transport by strengthening pull-in factors towards public transport, and keeping public transport users from leaving the system by minimising push-out factors of existing public transport offers.

Aspects highly relevant for users’ decision making processes are:

- Well coordinated services (intra- and intermodal).
- Greater consideration and individual attention shown towards potential customers’ personal situation.
- Satisfying ‘hard’ factors, as well as ‘soft’ factors.



### Selected examples to illustrate opportunities for action:

Within the area of action related to travellers' personal background, transportation companies should, for instance, tap the potential that lies in directly addressing people in situations of change. In all USEmobility countries swing users stated that changes in their personal situation had a major impact on their behavioural change. Nevertheless, systematic assistance to people whose personal situation is changing is still usually missing. Providers could proactively send comprehensive information on public transport and multimodal services to this promising target group (e.g. **welcome packages** to people who have moved recently). The packages can be combined with further marketing tools, such as welcome discounts for new passengers.

With respect to the 'services offered' area of action, especially short travel times, attractive tariffs, the availability of direct connections, frequency of connections, extended times of operation and flexibility are highly relevant for users' decision making processes. Users expect well coordinated services (intra- and intermodal). Measures like **common tickets** which allow passengers to use different public transport services with only one ticket regardless of the providing company will contribute to both customer retention and attracting new customers. The same applies to **better integration with other modes of transport** (park & ride and bike & ride, as well as integration of car-sharing or bike rental services). **Integration of new services** can also be a chance for the transportation companies to establish new and promising business models.

### Transport policy: Giving priority to public transport and multimodality

The area of action most relevant to transport policy is, unsurprisingly, the policy framework. Indeed, policy choices in the field of transport have considerable influence on users' decision making processes. In addition, in most European countries, national and local authorities and administrative bodies co-determine the characteristics and standards of the services offered, so that this is also a relevant area of action for transport policy, as well as consideration of travellers' personal background.

Transport policy aiming at more sustainable transport and a higher market share for public transport and multimodality, should follow a dual approach: on the one hand improving the attractiveness of the public transport services

#### USEmobility: First impacts in practice

*Welcome packages  
for new inhabitants in Austria*

*The USEmobility consortium is happy to see that the insights gained during the project already had practical consequences. Inspired by a meeting of the USEmobility Business Advisory Group in 2011, the Austrian transportation company ÖBB (S-Bahn Salzburg) has started in 2012 cooperation with housing enterprises. People moving in receive a comprehensive information package about the S-Bahn services (suburban railway services) including a gift coupon for public transport tickets. The method is currently being rolled out to other regions in Austria.*



*“The USEmobility design is new and innovative. The public transport users and their behaviour are not as static as many think, now we know better where to begin.”*  
*Hans Leister, Head of Center Regional Transport and Quality Management, Verkehrsverbund Berlin-Brandenburg (Public Transport Authority).*

### Experience from USEmobility countries

#### Strategy to support modal shift in Belgium

*The Brussels region in Belgium wants to promote modal shift to public transport, cycling, walking and carpooling. The general aim is to reduce car traffic in the Brussels region by 20 percent by 2018. Part of the strategy will be mandatory mobility plans for all employers with more than 100 employees. The mobility plans should develop measures to motivate employees to switch to public transport.*



offered, and on the other hand abandoning incentives for monomodal car use. The action is needed on the EU level to achieve a coherent and supportive policy framework has two dimensions, which should be well-coordinated: On the one hand, priority for public transport and eco-friendly multimodality must be reflected in the EU's own policy choices, not least in EU funding policies. On the other hand, the EU level should support initiatives on member state level to foster public transport and multimodality.

Aspects highly relevant for a coherent and supportive policy framework are:

- Clear targets and clear policy choices in favour of public transport.
- Integrated policies. Of particular importance is better integration of urban and spatial planning into transport policy, as well as better integration of environmental and climate policy, energy policy and health policy.
- Effective coordination of the different policy levels and clear distribution of tasks between the players involved.
- Reliable and sufficient funding in order to realise more and satisfying public transport services.

#### Selected examples to illustrate opportunities for action:

**Well-directed infrastructure investments**, for instance, can be an effective instrument for transport policy wanting to motivate more people to opt for public transport and multimodal combinations. As better reachability and shorter travel times have a considerable influence on people's modal choices, transport policy should invest in public transport infrastructure (new stations or stops, upgrading existing infrastructure or new infrastructure), as well as in multimodal infrastructure making it easier to combine different modes of transport (e.g. park & ride facilities and bike & ride facilities). The impact of infrastructural measures can be intensified by **urban and spatial planning strategies** that establish settlement structures facilitating the use of public transport and multimodality.

With respect to the services offered, people expect clear signals from transport policy. It is crucial that transport policy supports a public transport offer which is a real alternative to private car use, including **sufficient capacity** in order to enable further growth. As a basis, it is important to establish structures that guarantee a clear distribution of tasks between the players involved, and provide clear **incentives to attract more passengers**. Such incentives are not least important for public service contracts between public transport authorities and providers of transportation services and should enable transportation companies to be innovative and customer as well as market-oriented.

## Civil society organisations: Make the users’ needs and concerns heard

For civil society organisations willing to take action in the field of sustainable transport, the policy framework is a relevant area of action, as well as the characteristics of the services offered and the travellers’ attitudes and concerns.

Civil society organisations to be considered in the context of more eco-friendly mobility are, for instance, consumer and passenger organisations, environmental organisations and trade unions, as well as citizens’ groups, senior citizens’ organisations, or educational and training organisations. The different civil society organisations must develop their own strategy, one which is most suitable to the organisation’s focus, size and capabilities and which enables them to be present and visible in the public debate.

With respect to eco-friendly modal choices, civil society organisations can contribute to bridge the gap between users and decision makers in politics as well as in transportation companies. Furthermore, they can contribute to connect the debate on mobility with environmental issues, energy policy, health aspects and urban and spatial planning.

### Selected examples to illustrate opportunities for action:

First of all, CSOs can **sensitise providers of transportation services and public transport authorities to the users’ needs and concerns**. CSOs can support improvements in the public transport system by making concrete proposals on how to eliminate the practical problems that users are confronted with. By establishing institutionalised cooperation with transport policy and transportation companies (e.g. advisory boards), the expertise of civil society organisations can be integrated more intensively and regularly.

Besides sensitising providers of transportation services and public transport authorities to users’ concerns, civil society organisations can also **take action themselves**, e.g. by taking part in projects addressing people in situations of change, by offering information and advice regarding eco-friendly multimodal mobility, by taking part in research projects or projects on knowledge transfer or by running awareness-raising campaigns.

*“The USEmobility recommendations gave us important hints for discussion on the future development of our federation.” Josef Schneider, Member of the Administrative Council, Secretary, European Passengers’ Federation.*



### Experience from USEmobility countries

*Eco-friendly multimodal mobility explained to non-users in Belgium*

*In 2011, the Belgian passenger organisation *TreinTramBus* initiated in cooperation with other organisations the project “OV-ambassadeurs” (Ambassadors for public transport). The project wants to encourage senior citizens to switch from car use to eco-friendly public transport (bus, train, tram and metro) by offering workshops in which the participants get information and advice on how to use public transport. The workshops use a ‘peer-to-peer’ approach. Workshop organisers and target audience belong to the same generation: senior citizens.*

# Working with USEmobility: targeting travellers



## Experience from USEmobility countries

### *One ticket for tomorrow's customers in Germany*

*Special season tickets for teenagers are an interesting example of tariff offers for specific customer groups. The transport association Verkehrsverbund Rhein-Ruhr offers pupils the so-called 'SchokoTicket', which is valid not only on the direct way from home to school, but for all public transport services in the entire area from the Lower Rhine to the eastern Ruhr Area. The aim is that pupils, i.e. tomorrow's customers, become familiar with public transport for all their mobility needs from travelling to school to all kinds of activities in their spare time.*

The development of more eco-friendly multimodal mobility must be understood as a structural task that makes demands on many stakeholders and as an ongoing process. A strategy towards more eco-friendly multimodal mobility can only succeed if it is effectively coordinated between all stakeholders involved and integrated with other policies on all policy levels. It is important to set clear targets to make sure that all players pull in the same direction.

## Communication, image and emotions

Mobility begins in the mind. In order to achieve a higher share of eco-friendly mobility it will be decisive to make sure that people are 'on board'. All measures taken must be accompanied by **clear communication towards users and non-users** of public transport. Communication should not only address the relevant facts, but also aspects like **image and emotions**, as well as the benefits of eco-friendly multimodal mobility for the users and the society as a whole. Today, a more emotional, lifestyle-oriented approach certainly has potential, especially if one considers that not only among younger people new attitudes and new values can be observed. Public transport has the opportunity to be associated with modern mobility, including the freedom to be online, to work, and to relax, and be accompanied by a good environmental performance.

## Use the USEmobility strategic recommendations

The following documents with USEmobility strategic recommendations can be downloaded here:

<http://www.usemobility.eu/resources/reports>:

- D5.1: 'Strategic recommendations to decision makers in politics'
- D5.2: 'Strategic recommendations to the European Commission'
- D5.3: 'Strategic recommendations to providers of transportation services'
- D5.4: 'Strategic recommendations for involvement of civil society organisations'