

## Research for TRAN Committee – Relaunching transport and tourism in the EU after COVID-19 Part VI: Public Transport

### KEY FINDINGS

- Since the outbreak of the pandemic, the public transport sector has lost about 40-70% of passengers. Currently, the level of ridership compared to pre-COVID levels is around 60-70% in many European cities.
- Within the next 3 years, public transport authorities (PTAs) expect this variation in passengers settling at a structural 10-15% decrease in usage of urban public transport compared to pre-pandemic levels.
- Rail passenger transport demand decreased by about 48% for annual passenger-km compared to 2019, as well as an average of 30-40% fewer passengers. Since May 2021, there has been a significant improvement of passenger volumes. However, in August 2021 the sector still experienced a 33% contraction compared to pre-crisis times.
- There is no evidence that using public transport increases the risk of contracting the virus, if personal protection and sanitation measures are in place.
- Digital tools have been used in several cities to improve public transport services. Many public authorities work on the management of transport demand to reduce peak travels.
- Integration between public transport, walking and cycling is key to deliver competitive levels of service. The sector should take this opportunity to enhance flexibility, service quality and technological tools.
- The rail infrastructure in Europe, in particular the non-high-speed network, needs to be renewed and extended, while made more consistent Europe-wide.

The present document is the executive summary of the study on Relaunching transport and tourism in the EU after COVID-19 – Part VI: Public Transport. The full study, which is available in English can be downloaded at: <https://bit.ly/3rXORWt>

- The increased demand for on-demand and flexible public transport services due to COVID-19 and the ageing population can provide a boost to the systematic consideration of vulnerable users.
- Monitoring mobility patterns can support effective government decision making, management and operations, providing public transport operators and public transport authorities with evidence-based decision making.
- Following a period of temporary financial support, public transport stakeholders should define a framework to facilitate stable financing and funding for public transport.
- National and local authorities should support the implementation of public transport-related infrastructural projects in a more systematic way.

### **The impacts of COVID-19 on the public transport sector**



The COVID-19 pandemic has significantly reduced ridership across public transport networks. Since the outbreak of the pandemic, the public transport sector has lost 40-70% of passengers. As of today, many European metropolitan areas currently record a 60-70% of pre-pandemic public transport ridership level. Within the next 3 years, public transport authorities (PTAs) expect this variation to settle at a 10-15% decrease in usage of public transport compared to pre-pandemic levels.

The rise of teleworking appears to be a permanent change, at least on a hybrid model. As a result, commuting trips in many countries have reduced in frequency.

The restrictions on international and domestic travels have also caused a widespread decline in the demand for passenger transport. In 2020, this led to a 48% decrease in annual passenger-km compared to 2019, accompanied by a 40% drop in passenger numbers. In the same year, there has simultaneously been a reduction in circulating trains, corresponding to an 11% reduction in transport service supply compared to 2019.

These changes prompted comprehensive financial losses. The contraction of farebox revenue was estimated to average 90%. This has been compensated, in most cases, by national authorities. However, in several cases during the 2021-2022 period, the losses will be covered through reduced timetables.

Railways in the European Union lost 24 billion euros in revenues for passenger services over the year 2020, a 41% reduction compared to 2019.

### **How to rebuild confidence in public transport?**

There is no evidence that using public transport increases the risk of contracting the COVID-19 virus if personal protection, physical distancing and sanitation measures are in place.

According to surveys, EU citizens would prefer the prioritisation of policies promoting public transport at the city level. However, at the same time they seek safe mobility options, therefore often preferring the use of private cars. The analysis of perceptions and needs of these different segments can help policy makers and planners to define policies and campaigns to incentivise the use of public transport and forecast changing demand for service planning.

Some PTAs are trying to regain passenger trust through communication campaigns on infection-proof networks, highlighting stringent cleaning protocols and transparent scientific information, while also informing travellers on risk-minimising behaviours.

Digital tools have been used in many cities to inform users of the real-time network occupancy, suggest alternative routes, support contact-tracing strategies and help citizens feel safe in public transport.

### **The “new normal”: opportunities and innovations for post-COVID-19 scenarios**

Many public authorities have already intervened on the management of transport demand and will continue to do so. Going forward, pricing policies can discourage travel during peak hours, (real-time) information on crowding can help users to adapt their travel choices, and quotas and seat reservations on rail services for peak time travels help to manage capacity.

Integration between public transport, walking and cycling is key to delivering competitive levels of service. PTAs and public transport operators (PTOs) have the opportunity to accelerate the deployment of new business and operational models for on-demand public transport in conjunction with shared mobility services. This will also help to facilitate their move towards comprehensive Mobility-as-a-Service (MaaS) options.

The rise of new technologies increases the quantity of available data on transport habits and trajectories. Applications and traffic management tools are important for managing safety-related aspects such as physical distancing, contactless transactions, and flexible timetables.

However, the introduction of new on-demand and flexible public transport technologies should systematically take into account the broad range of passenger needs and their digital capabilities. The digital divide represents a challenge for segments of the population which are most affected by COVID-19, particularly the aged and those with disabilities.

The rail infrastructure in Europe, in particular the non-high-speed network, needs to be renewed and extended and made more consistent across the continent. In order to mitigate the economic impact of COVID-19, EU Regulation 2020/1429 reduces the financial burden on rail undertakings by temporarily easing rules on charges.

### **Recommendations**

This review exposes the need to capitalise on the large - and growing - quantity and quality of studies exploring the limited risks of contracting the virus on public transport, and translate them into convincing information campaigns. This will be essential to combat misinformation around the safety of services and encourage higher network usage.

Monitoring mobility patterns can support effective government's evaluation, management and operations, providing PTOs and PTAs with evidence-based decision making. This will ensure services are designed according to passenger requirements and needs.

Following a period of temporary financial support, public transport stakeholders should define a framework to facilitate stable financing and funding for public transport. National and regional authorities should work together to include a higher share of public transport-focussed investments in their plans. This could be supported through the commissioning of a study to assess the effectiveness of recent measures, and which of them should eventually be continued in the future.

Public transport is expected to become a competitive mobility option. The sector should take this opportunity to enhance flexibility, service quality and technological tools. This should include night services, Mobility-as-a-Service (MaaS), high-speed routes and links between urban and per-urban areas. The cost of services should also continually be assessed to ensure affordability.

National and local authorities should support the implementation of public transport-related infrastructural projects in a more systematic way, providing for dedicated timelines and funding for all urban nodes of the TEN-T network.

Data sharing protocols with a defined set of minimum data are expected to ensure the ease of cross-border travel and circulation in foreign countries. These should ease data sharing while establishing systemised ways of collaborating in a GDPR compliant way.

## Further information

This executive summary is available in the following languages: English, French, German, Italian and Spanish. The study, which is available in English, and the summaries can be downloaded at: <https://bit.ly/3rX0RWt>

More information on Policy Department research for TRAN: <https://research4committees.blog/tran/>



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