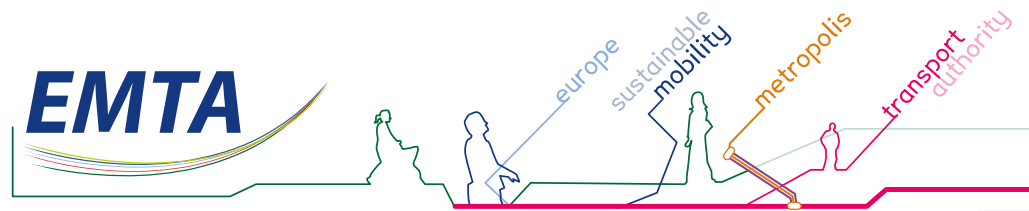




EMTA



barometer 2022 based on 2020 DATA 16 th edition



Foreword by Alexandre Santacreu, EMTA Secretary general

The year 2020 brought the biggest shock in decades for the public transport industry. Due to the Covid-19 pandemic, the number of passengers fell by 44%. Nevertheless, the production of public transport services was barely affected, with a modest 6% drop in vehicle-kilometres. The public transport industry has once again demonstrated its resilience, maintaining service levels at a critical moment when essential workers needed it the most.

This edition of the EMTA barometer examines how public transport in each metropolitan area was affected by the Covid-19 crisis. Differences are visible across cities, but our data paints a very consistent picture: that of a collapse in passenger numbers and fare revenues.

For March 2022, the vast majority of EMTA members report patronage figures 20%-30% below 2019 levels. Most of our members expect a return to 2019 levels by 2024, but five major metropolitan area anticipate a return to normal between 2027 and 2030.

The pandemic has accelerated pre-existing trends towards cycling and remote working that are likely to remain and keep transforming mobility patterns. This will alter the financial balance of public transport networks at a time when climate change mitigation strategies consider public transport the backbone of a passenger mobility system. Funding will thus be a priority question for EMTA and its members in the years to come.

This edition of the EMTA barometer results from a remarkable joint effort by 30 members. Sofia (Bulgaria) having joined the association in May 2022 will contribute to the next edition of the barometer, an edition that will bring significant changes. The barometer will have a quicker turnaround time, made possible through a simplified questionnaire. A greater focus on the longitudinal analysis will reveal how things change over time. A focus on what matters the most to public transport authorities will naturally drive those changes.

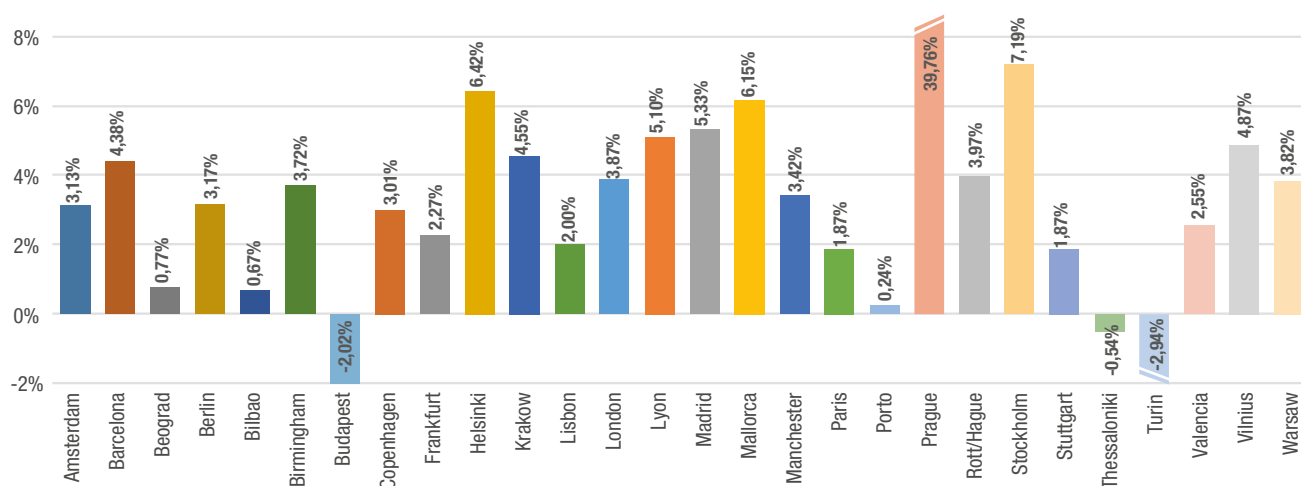
1. Description of the PTA⁽¹⁾ area surveyed

Authority responsible	Main city population	PTA area population	PTA (km ²)	PTA urbanised area	PTA urban density (inhab./km ²)	Annual PTA GDP per inhabitant (€) ⁽²⁾	
VRA	Amsterdam	873,289	1,569,497	1,025	850	1,846	34,300 €
ATM	Barcelona	1,664,182	5,703,334	8,810	3,440	1,658	39,297 €
SfPTB	Belgrade	1,692,768	1,692,768	3,224	625	2,708	11,642 €
VBB	Berlin	3,664,088	6,195,159	30,546	3,478	1,781	36,894 €
CTB	Bilbao	1,149,044	1,149,044	2,215	235	4,890	35,098 €
TfWM	Birmingham	1,140,525	2,939,927	902	680	4,323	26,187 €
BKK	Budapest	1,723,836	1,723,836	525	358	4,815	29,033 €
MOVIA	Copenhagen	741,794	2,654,264	9,200	1,713	1,549	59,996 €
RMV	Frankfurt	764,104	5,244,268	13,583	2,452	2,139	56,037 €
HSL	Helsinki	656,920	1,340,931	1,968	543	2,469	61,502 €
ZTP	Krakow	779,966	1,106,239	1,472	364	3,039	20,381 €
TML	Lisbon	509,614	2,869,033	3,015	654	4,388	24,897 €
TfL	London	9,002,488	9,002,488	1,579	1,042	8,640	66,918 €
SYTRAL	Lyon	669,294	1,415,357	537	360	3,932	52,708 €
CRTM	Madrid	3,334,730	6,779,888	8,028	589	11,518	36,250 €
CTM	Mallorca	419,366	912,171	3,636	214	4,262	
TfGM	Manchester	555,741	2,848,286	1,272	959	2,970	29,715 €
RUTER	Oslo	697,010	1,370,642	5,006	342	4,003	62,948 €
IdFM	Paris	2,154,096	12,308,593	12,000	2,728	4,512	58,993 €
AMP	Porto	216,887	1,727,774	2,041	510	3,386	18,722 €
ROPID	Prague	1,335,084	2,715,134	9,354			31,336 €
MRDH	Rott/Hague ⁽³⁾	651,631	2,399,952	1,256	345	6,962	
SL	Stockholm	975,551	2,391,990	6,514	903	2,649	64,732 €
VRS	Stuttgart	630,305	2,529,077	3,011	736	3,436	58,083 €
TheTA	Thessaloniki	789,191	1,104,023	3,677	397	2,781	14,300 €
AMP	Turin	858,205	4,274,945	25,387	1,771	2,414	20,899 €
ATMV	Valencia	800,215	1,843,186	1,551		5,909	
VOR	Vienna	1,920,949	3,907,838	23,560	3,349	1,167	42,233 €
MESP	Vilnius	569,691	569,691	401	204	2,793	37,106 €
ZTM	Warsaw	1,794,166	2,692,925	2,884	603	4,466	34,501 €

(1) PTA: Public transport authority (2) GDP: Gross domestic product (3) Rotterdam and The Hague have one PTA

2. Evolution of population in PTA's areas 2016-2020

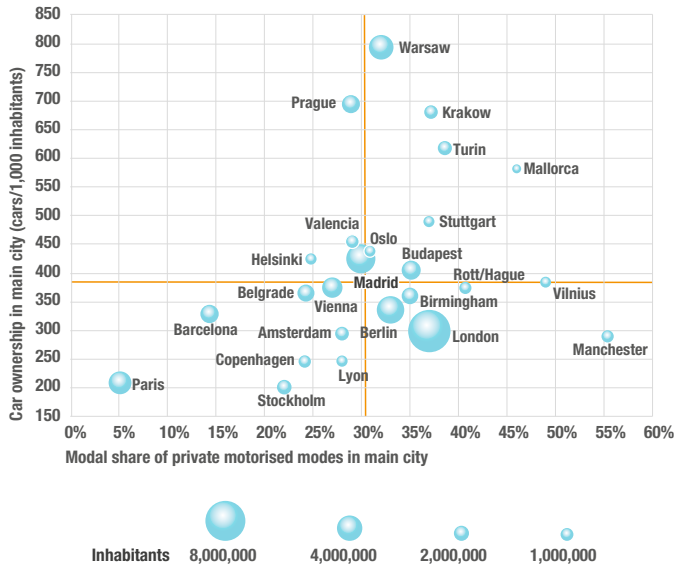
Population figures have increased in most PTAs over the period 2016-2020. The highest increase occurred in Prague, due to the integration of new areas in Central Bohemian region.



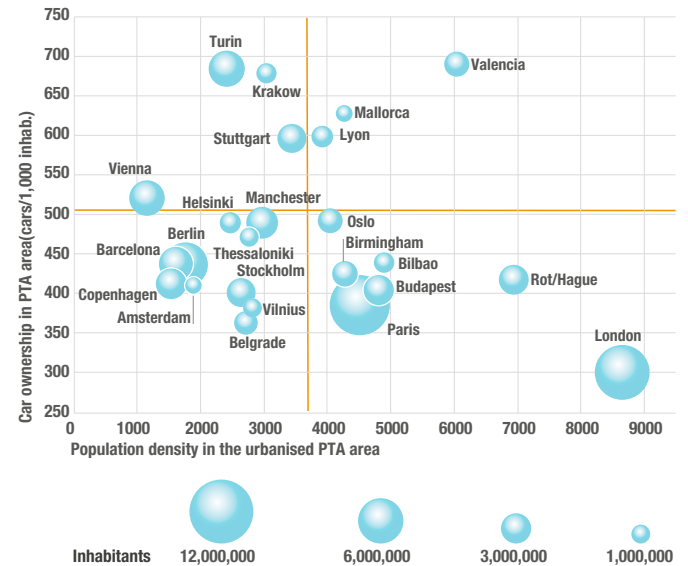
3. Car ownership rate

The first chart represents the relationship between car ownership and the modal share of private motorised modes in the main city. The bubble size represents the population of the main city. The second chart represents the relationship between car ownership, expressed as cars per 1,000 inhabitants and the population density over the urbanised PTA area. The bubble size represents the population of the PTA area.

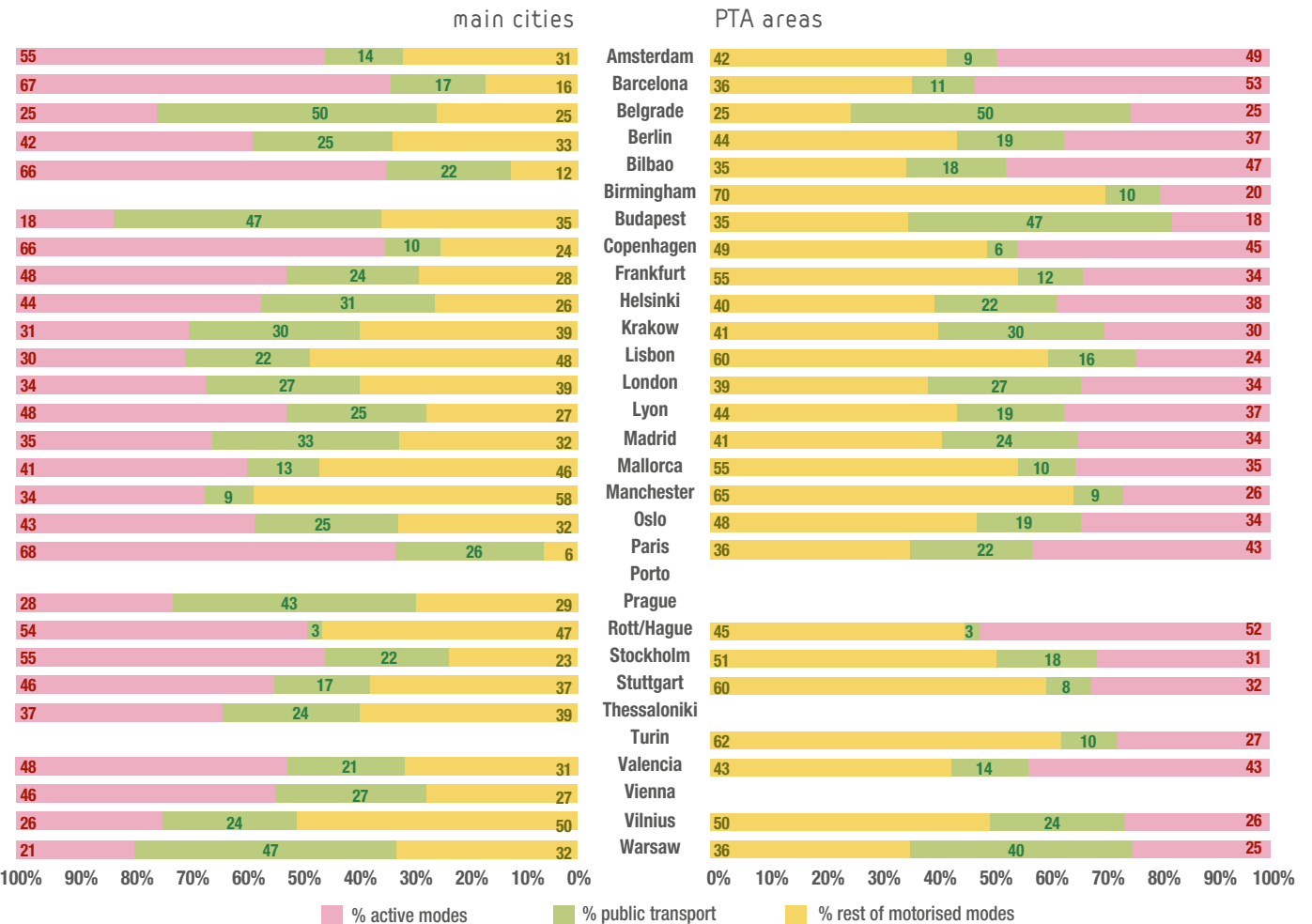
Car ownership versus modal share in private motorised in main city



Car ownership versus urban density in PTA area



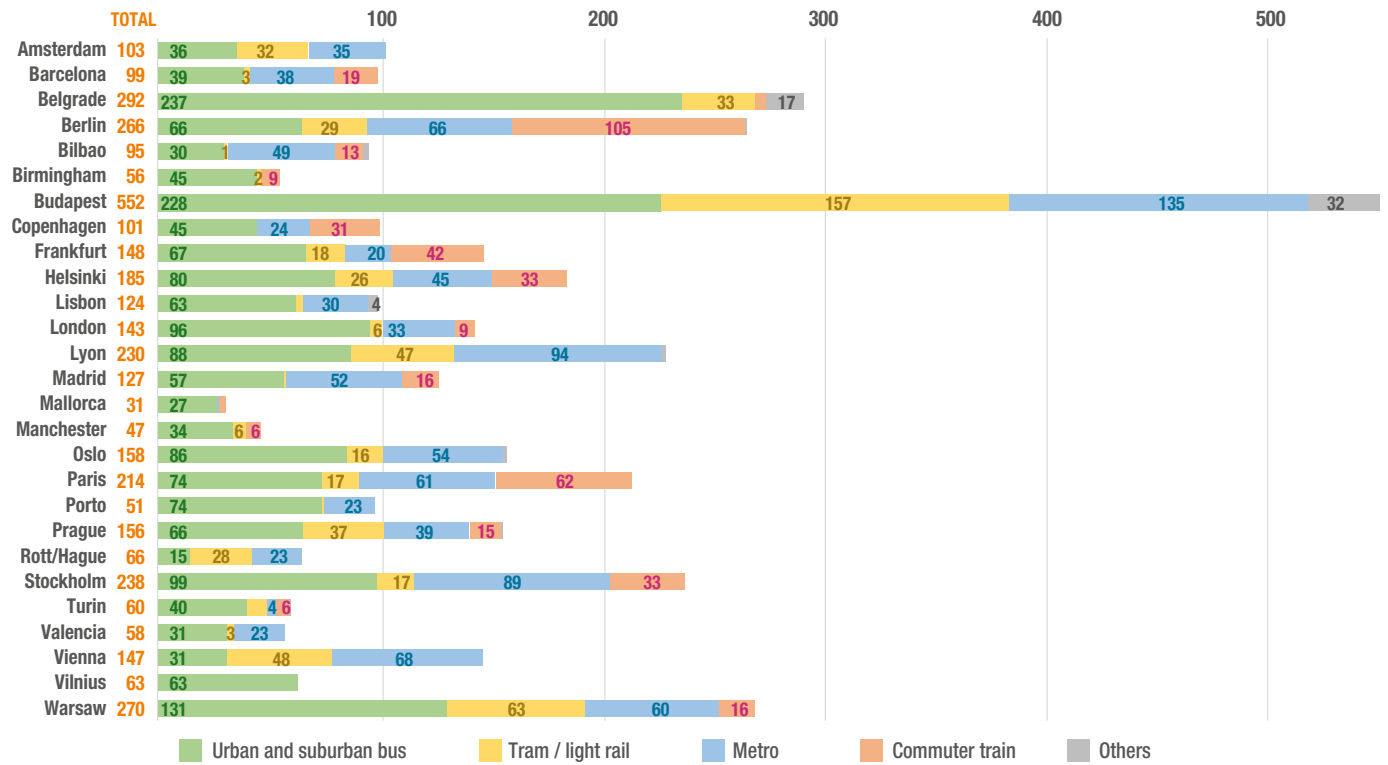
4. Modal share in main cities & PTA areas



5. Public transport demand per inhabitant in PTA areas

The Covid-19 pandemic has dramatically impacted the mobility of populations in 2020, with measures including lockdown, curfews and teleworking. On average across EMTA members in 2020, the number of public transport trips fell by 44% from 288 to 161 per year and per inhabitant. The chart below represents the number of trips (also called boardings) per year and per unit population, for each PTA and each mode. When interpreting figures from Budapest, one should keep in mind the large proportion of people commuting from outside PTA boundaries.

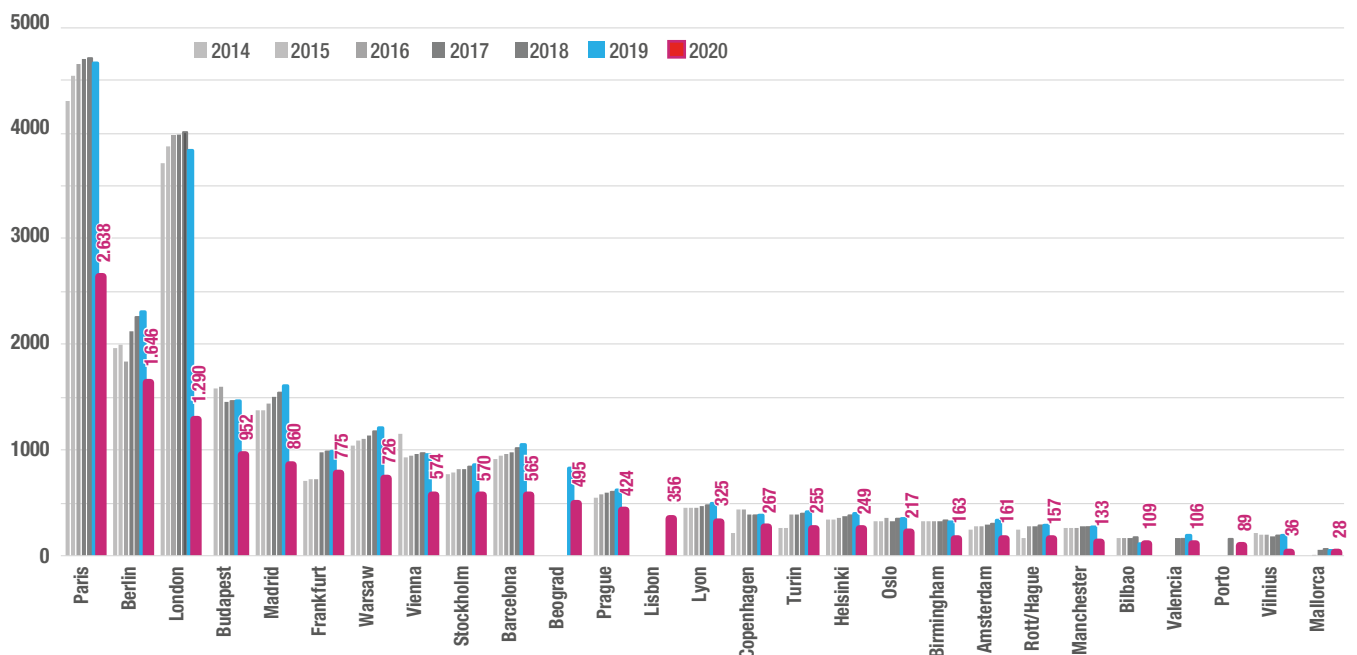
Public transport demand (boardings per inhabitant in PT per mode)



6. Public transport demand trends

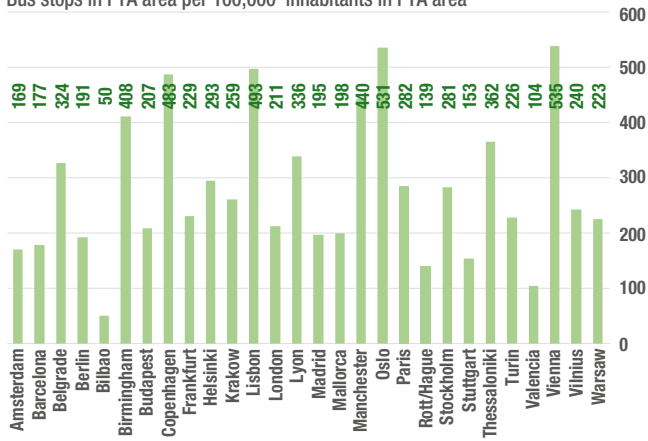
The chart below illustrates the growth observed between 2014 and 2019 in public transport trips, followed by a sharp decrease in 2020. Vilnius and London lost more than 60% of their passenger numbers; Amsterdam, Barcelona, Birmingham, Madrid, Mallorca, Manchester, Paris, Rotterdam-The Hague, Valencia and Vienna more than 40%; and the rest up to 25%.

Public transport trips (million boardings per year)

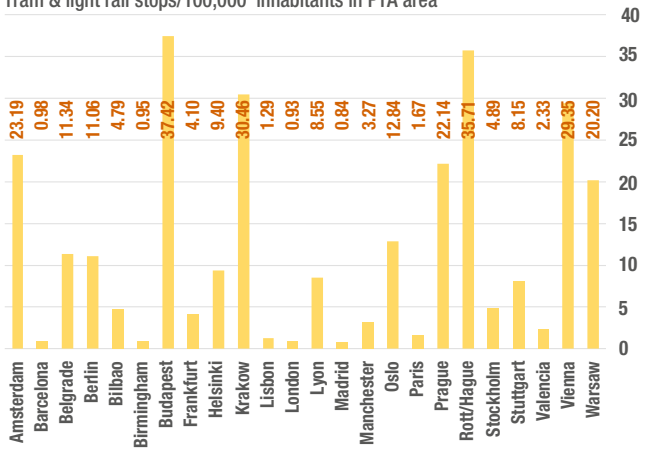


7. Ratio of stops or stations per 100,000 inhabitants in PTA area

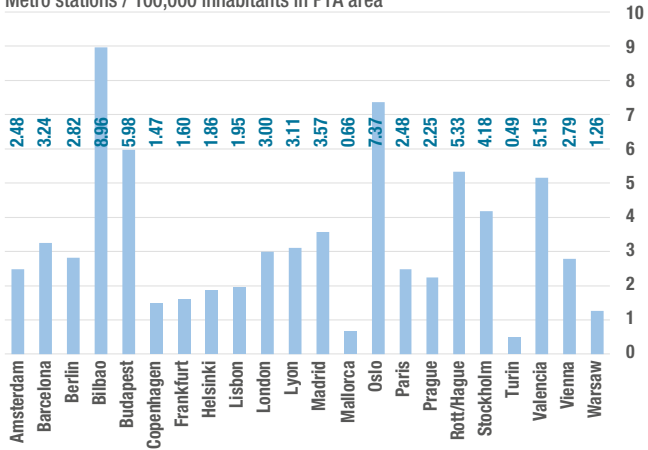
Bus stops in PTA area per 100,000 inhabitants in PTA area



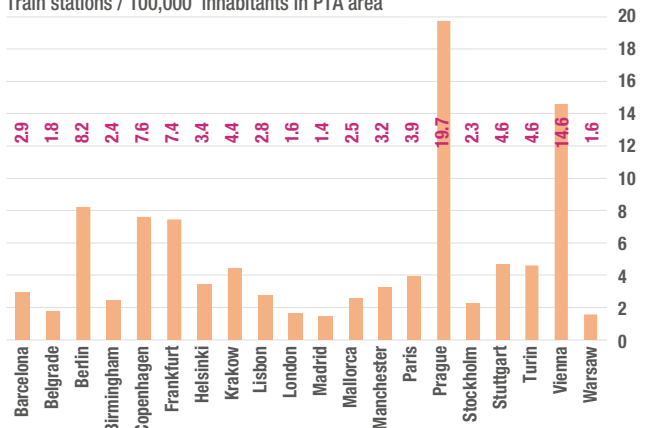
Tram & light rail stops/100,000 inhabitants in PTA area



Metro stations / 100,000 inhabitants in PTA area

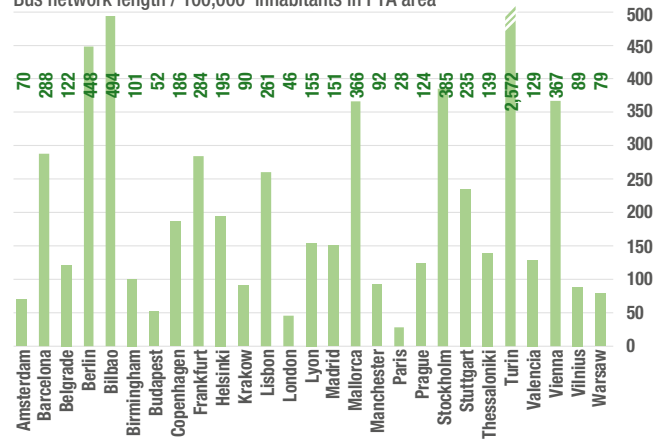


Train stations / 100,000 inhabitants in PTA area

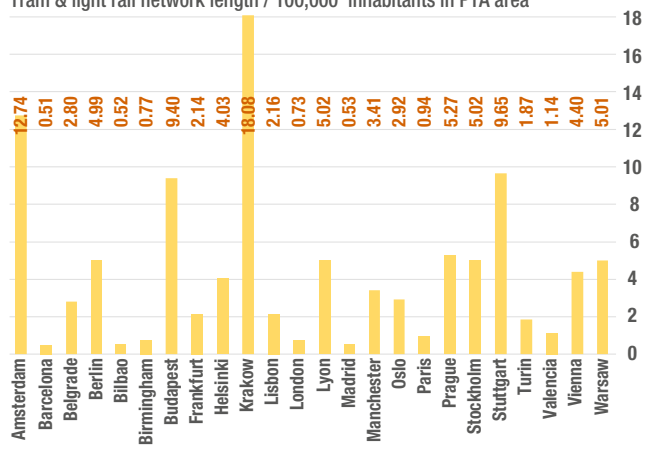


8. Ratio of network length per 100,000 inhabitants in PTA area

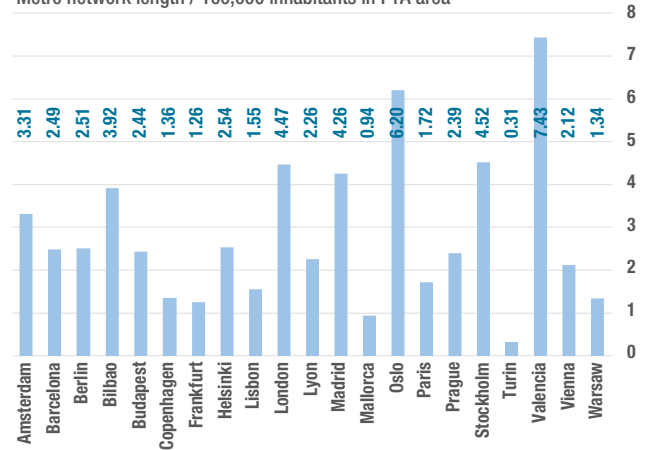
Bus network length / 100,000 inhabitants in PTA area



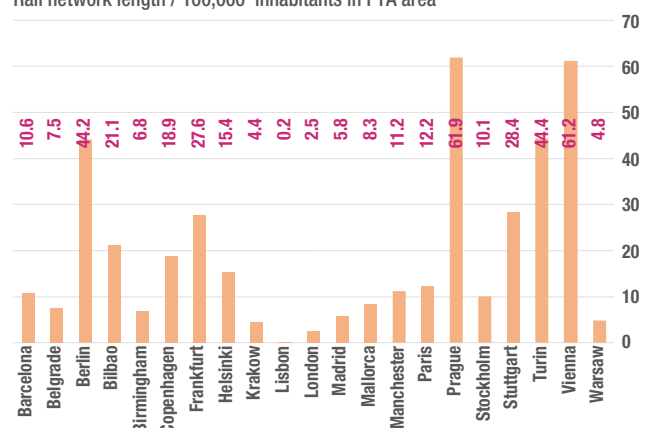
Tram & light rail network length / 100,000 inhabitants in PTA area



Metro network length / 100,000 inhabitants in PTA area



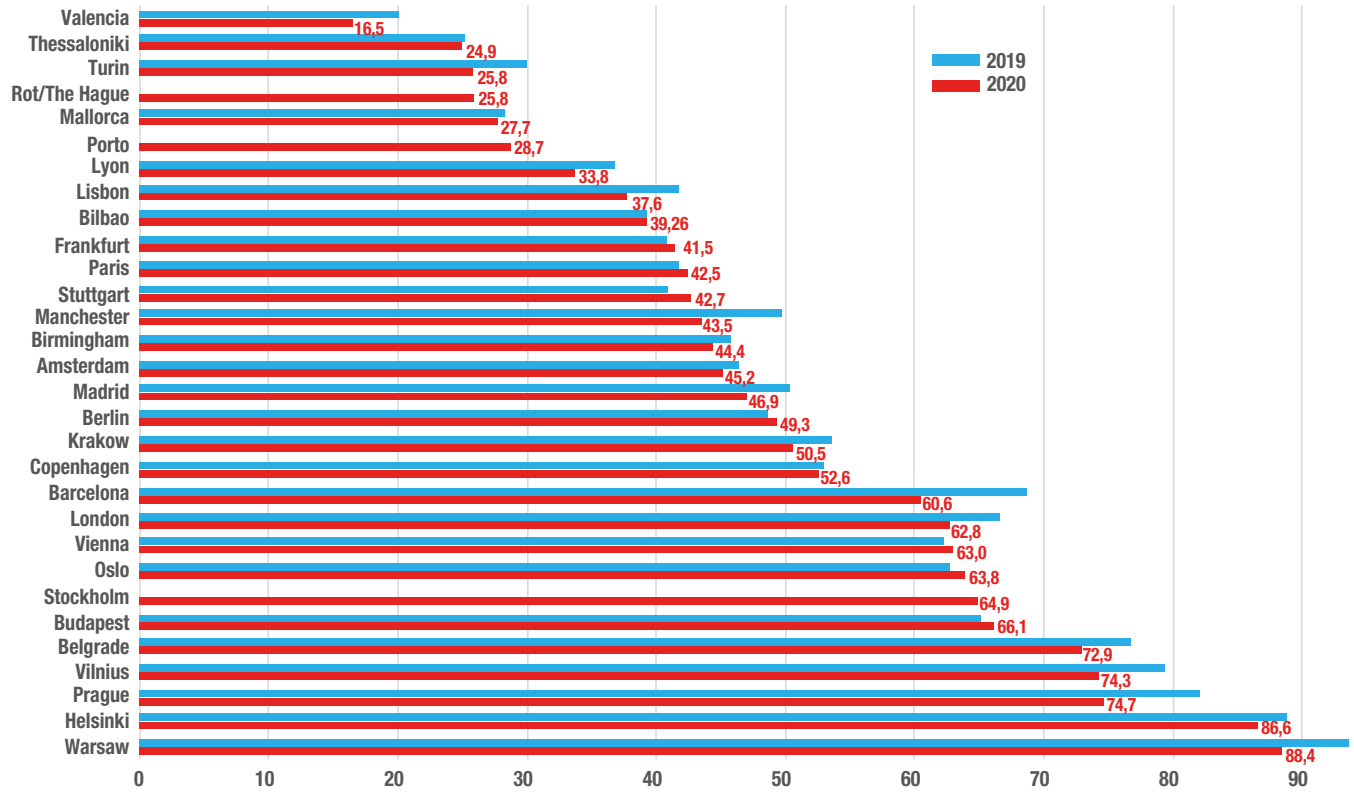
Rail network length / 100,000 inhabitants in PTA area



9. Public transport supply

Confronted with a sharp drop in passenger demand, but encouraged to facilitate the movement of essential workers at all times, public transport authorities have maintained a service level relatively close to that observed in 2019. The production of vehicle-kilometres was only reduced by 6% on average. The chart below not only shows this reduction on the supply side, it also identifies Warsaw, Helsinki, Prague, Vilnius and Belgrade as the top-5 PTAs in terms of vehicle-kilometres produced per inhabitant.

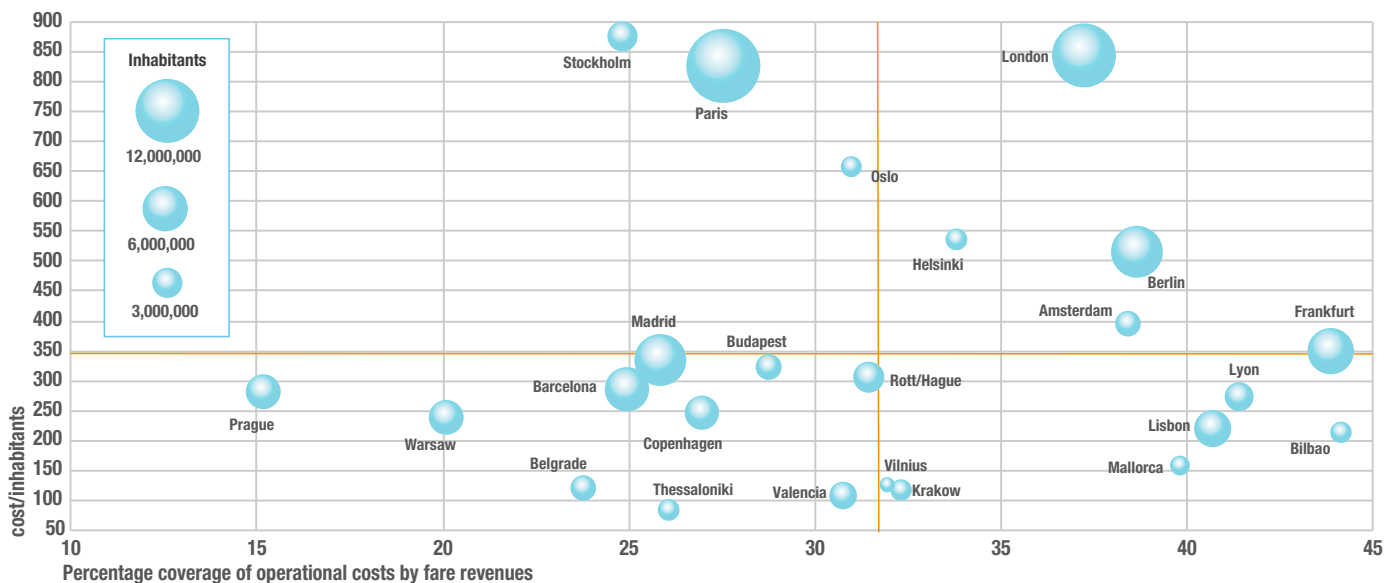
Vehicle-kilometres per inhabitant in the PTA area



10. Coverage of operational costs

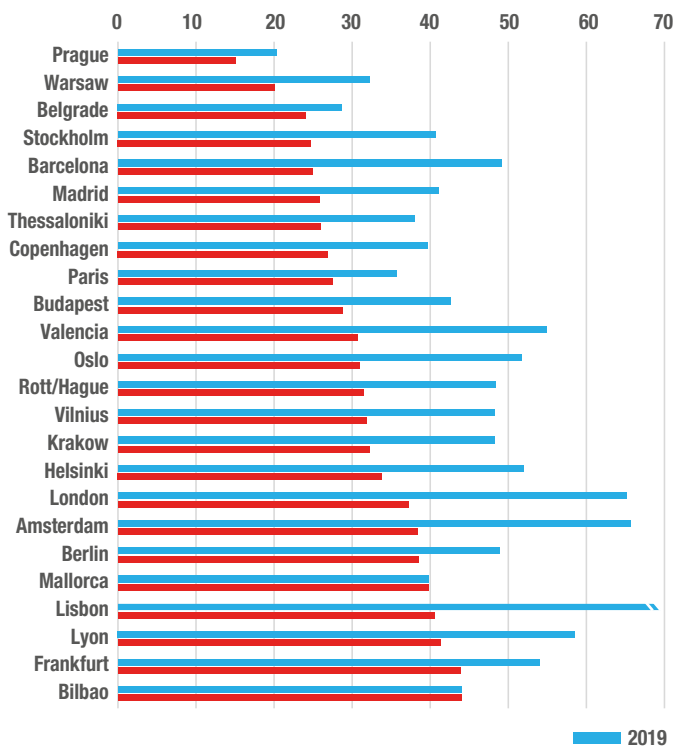
About 360 € per inhabitant and per year is the average cost of public transport operations across EMTA members. The PTAs of Paris (1,004 €/inhab.), Stockholm (875 €/inhab.) and Greater London (850 €/inhab.) have the highest ratio and Thessaloniki the lowest (84 €/inhab.). Coverage of operational costs by fare revenues fell from 48% in 2019 to 33% in 2020. This is the consequence of the choice that was made to maintain service levels in spite of a large drop in public transport passenger trips in 2020.

Cost per inhabitant vs coverage by fare revenues in PTA areas

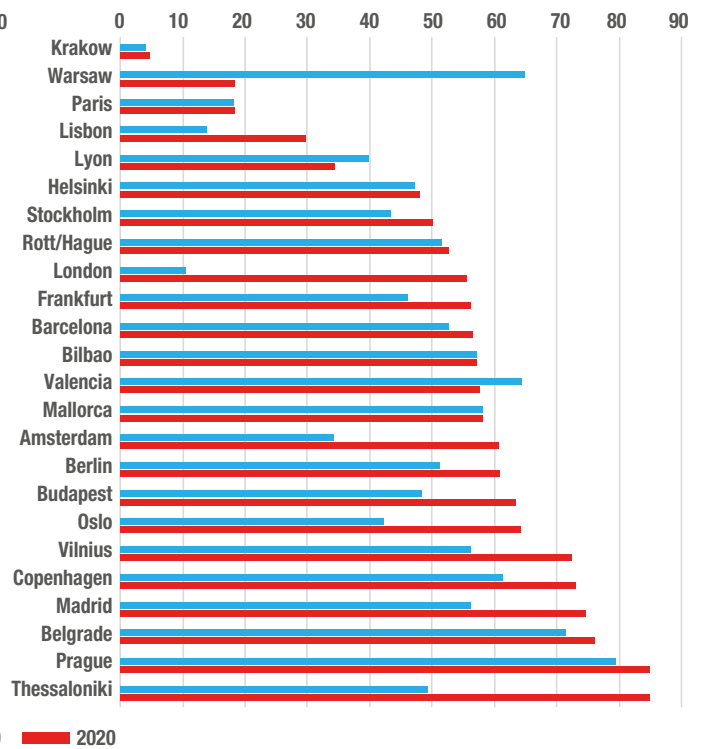


11. Financial data

Coverage (%) by fare revenues



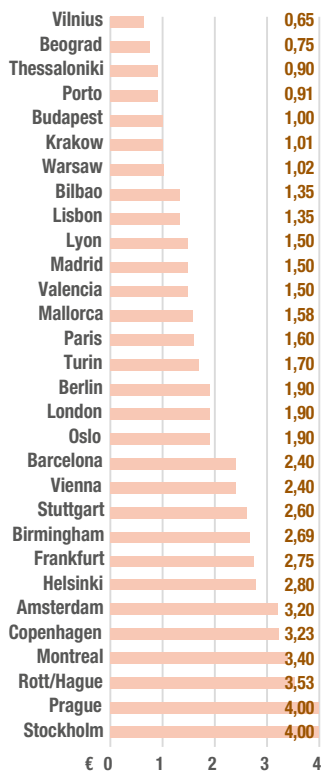
Coverage (%) by public subsidies



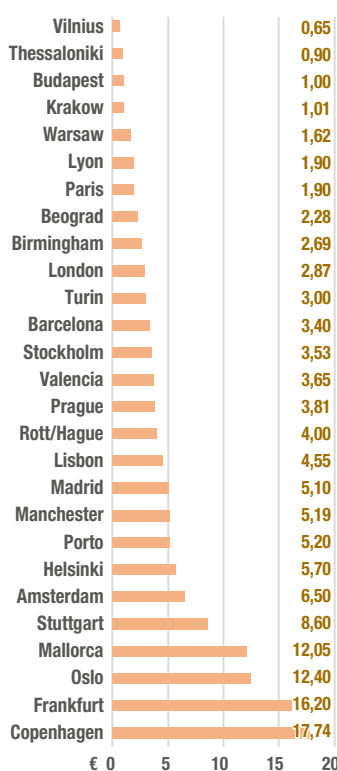
12. Ticket price for the main city and PTA area

Some fare adjustments have occurred throughout 2020 in some PTA` regions. Specifically, in Barcelona ATM, in the annual pass, the T-Mes disappeared and the T-usual entered, offering unlimited travel in 30 days for €40 in 1 zone and for €113.75 for 6 zones. Stockholm lowered the price for some single tickets so that the price is the same regardless of how you pay (credit card, app, or travel card). Thessaloniki introduced lower fares in June 2020.

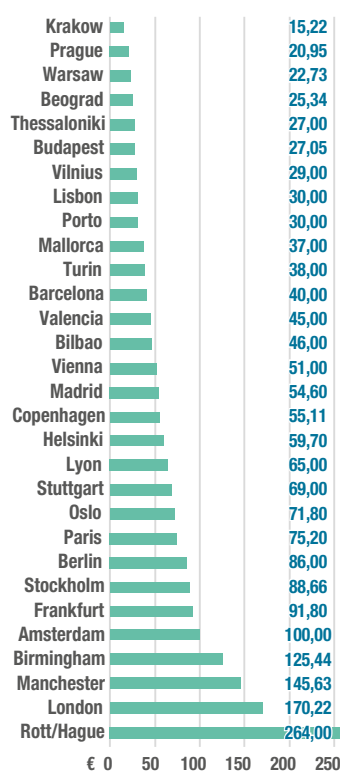
Single trip ticket price main city



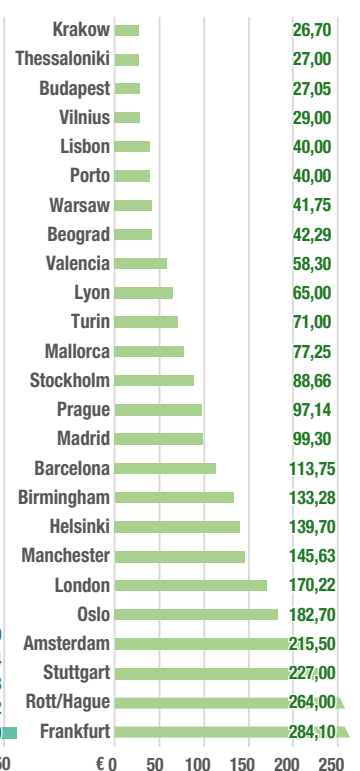
Single trip ticket price PTA area



Monthly pass main city



Monthly pass PTA area





EMTA public transport authorities' partners



Vervoerregio
Amsterdam (VRA)



Autoritat del Transport
Metropolità (ATM) Barcelona



Sekretarijat Za Javni Prevoz
(SfPT) Belgrade



Verkehrsverbund
Berlin-Brandenburg (VBB) Berlin



Consorcio de Transportes de
Bizkaia (CTB) Bilbao



Transport for West Midlands
(TfWM) Birmingham



Budapesti Közlekedési
Központ (BKK) Budapest



Trafikselskabet Movia
Copenhagen



Rhein-Main Verkehrsverbund
Frankfurt



Helsinki Region Transport
(HSL) Helsinki



Zarząd Transportu
Publicznego w Krakowie



Transportes Metropolitanos
de Lisboa



Transport for London
(TfL)



Syndicat Mixte des
Transports pour le Rhône et
l'Agglomération Lyonnaise



Consorcio Regional de
Transportes de Madrid (CRTM)



Consorci Transports
Mallorca



Transport for Greater
Manchester (TFGM)



RUTER
Oslo



Ile-de-France Mobilités
Paris & Ile-de-France



Área metropolitana
do Porto



Prague Integrated
Transport



Metropoolregio
Rotterdam Den Haag (MRDH)



Stockholms Lokaltrafik AB
Stockholm (SL)



Verband Region Stuttgart
(VRS)



Thessaloniki Transport
Authority (TheTA)



Agenzia della mobilità
piemontese (AMP) Turin



Autoritat de Transport
Metropolità de València (ATMV)



Verkehrsverbund Ost-Region
Wien (VOR)



Susisiekimo Paslaugos (MESP)
Vilnius



Zarząd Transportu Miejskiego
Warszawie (ZTM) Warsaw

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