



# Mobility in Germany 2017

## Summary of the short report

### Objective

Traveling and mobility influence our day-to-day lives. They are a part of our social lives, to different degrees, during work and education, leisure activities and everyday personal business. Precise knowledge about these mobility requirements and everyday transport occurrences is a prerequisite to providing the required resources. While a constantly increasing growth in car mobility in recent decades was recorded, much effort now concentrates on once more promoting awareness of other transport services, such as public transport, cycling and walking. It is apparent, not only in Germany, that the continuous growth of car transport is reaching its limits. Despite this, it remains a formative component of transport and must be actively modelled.

The Mobility in Germany (MiD) study provides extensive information on the current state of day-to-day mobility in Germany. This short report presents the core results of the study. An extensive findings report for the year 2017, a time-series report as well as many more items of documentation are available at [www.mobilitaet-in-deutschland.de](http://www.mobilitaet-in-deutschland.de). All documentation on the earlier surveys by Mobility in Germany in the years 2002 and 2008 are also available there.

### Data base

After 2002 and 2008, the Federal Ministry of Transport and Digital Infrastructure commissioned the infas Institute for Applied Social Sciences to carry out the Mobility in Germany study for the third time in 2017. Involved on the part of the client were over 60 regional partners who had commissioned additional regional samples. As previously in 2008, processing was carried out together with the Institute of Transport Research at the German Aerospace Centre. In addition, the project team was extended to include IVT Research as well as infas 360.

The field phase of the current survey, with a reference survey date stretching for over twelve months, took place in the period between May 2016 and September 2017. The study participants were able to take part in a multistage procedure in writing, by telephone or online. Within the realised overall sample of 156,420 households, 33,389 households were allotted to the base sample for the whole of Germany and 123,031 to the additional regional samples. A total of 316,361 persons were interviewed who reported on 960,619 trips on their respective survey dates.

The evaluation of the base sample as well as the regional additions are integrated. The extrapolation of the results provides extensive key values for the year 2017 on day-to-day mobility among Germany's residential population and refers to all the trips they made within Germany.

The Mobility in Germany 2002, 2008 and 2017 surveys are each designed as a representative cross-sectional survey. Despite a largely identical design of the studies, the surveys are not readily comparable. This is due to the population figures which were retrospectively corrected on the basis of the micro-census, the selection and extrapolation procedures which were further developed as part of the 2017 data survey, as well as the improved data preparation. In order to optimise compatibility, retrospective adjustments for the weighting procedures as well as data preparation procedures were carried out for Mobility in Germany 2002 and 2008 and taken into account in the time-series comparisons.

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## Results telegram

### Overall transport volume virtually stable, but regionally very different

- Seen as a whole, the total German passenger-transport volume (measured as number of trips) and as well the total passenger-kilometre performance (measured as the passenger kilometres travelled) in total have changed only a little compared to the last Mobility in Germany surveys from 2002 and 2008. The volume has reduced slightly compared to 2008 and now lies at almost 260 mio. trips per day. On the other hand, the transport distance has slightly increased to around 3.2 bn. passenger kilometres a day.
- This overall development is misleading in terms of regional differences. In particular in the major towns, both values increase significantly in some cases, not least because of the population growth there – with corresponding transport burdens in the conurbation areas on the one hand and benefits for public transport on the other.
- The so-called ‘rate of mobility’, which means the share of trip makers, has declined. While in 2008 an average of 90 per cent of the citizens were on the move on an average day, this value achieved only 85 per cent in 2017. This leads to a somewhat reduced average number of 3.1 trips per person and day. In 2008 the respective value was 3.4 trips. The above average decline for children and young people is striking as well as for households with lower economic status.

### Still low growth in the proportion of cars

- The transport modal split, measured as share of mode of transport of all trips, shows a slight growth in private motorised transport and low proportional increases for the remaining modes of transport. The bicycle, bus and rail are among the winners, in particular in urban areas. On the other hand, the proportional value of trips covered on foot alone is declining in towns and the country. In Mobility in Germany, a ‘trip’ is understood to be a movement from origin to destination including possible stops and changes in modes of transport.

- The modal split across the whole of Germany in 2017 thus lies at 22 per cent for trips covered on foot alone, 11 per cent for the bicycle, 43 per cent for trips by the car driver as well as 14 per cent for those by the car passenger. Public transport including long-distance transport reached a proportion of 10 per cent of the transport volume. In this examination of the ‘Main travel mode’, trips for which different modes of transport were used are summarised according to a hierarchy and allocated to one of the above-mentioned modes of transport.
- The examination of passenger-kilometre performance, i.e. the covered passenger kilometres, shows a clear increase for the bicycle as well as public transport. The vehicle mileage of car drivers has increased to a lesser extent. The values for the car passengers have declined somewhat.

### Plus for the environmental alliance of bicycle, bus and rail, but minus for pedestrian traffic

- The bicycle is on the rise, especially in the kilometres cycled. Thus, the bicycle is being ridden in particular for somewhat further distances. In total, the cycled passenger kilometres compared to 2002 have increased by around a quarter. Compared to 2008 this is more than a tenth.
- Public transport has grown proportionally and absolutely in volume, but in particular in kilometre performance. Here it has increased by a half compared to 2002 and by a tenth compared to 2008.
- It’s a different picture when it comes to pedestrian traffic: this has made losses, in particular in modal share of transport volume, and went down from 25 per cent in 2008 to 22 per cent in the year 2017.
- Even though local public transport has increased and has benefited from growing commuter transport it is the mode of transport with the comparably most unfavourable subjective assessment by the interviewees. In addition, it is the least gladly used. The favourite on both counts is the car.

### More and bigger cars

- The fleet of cars has now grown to a good 43 mio. vehicles in private households. Unlike in 2008, there is therefore now more than one car to each household. The fleet size has particularly grown in the eastern German states and rural regions. Outside the towns, 90 per cent of households now have at least one car at their disposal. When looking at Germany as a whole, 23 per cent of households continue to be without a car. However, households with more than one car have recorded a slight rise.
- Within the fleet, SUVs, off-road vehicles and vans have doubled their proportion in the surveyed households compared to 2008 from around ten to now around 20 per cent.
- The average occupancy rate of cars has hardly changed. It lies at around 1.5 persons for both 2002 and 2008.
- Overall, possession of a car driving licence has increased slightly. In 2017, 87 per cent of 17 year-olds and older have a car driving licence – one per cent more than in 2008. As always, a differentiated view is required here too. The proportion declines, particularly in the age-group of under 30 year-olds. In the case of senior citizens however, it has now exceeded the 80 per cent mark.

### Less activity among children, continued growth in car preference among senior citizens

- Young adults in major towns are less car-orientated than their peers were in previous years. This can also be seen in the declining quotas of driving licence possession. It's a different picture among the older age groups. For example the day-to-day mobility of 30-60 year-olds is only slightly different to that of this age group in the Mobility in Germany surveys of 2002 and 2008.
- The level of mobility among children and young people has changed. They are less on the move than the same age groups in 2002 and 2008. However, this differs according to household situation and economic status.
- As was the case between 2002 and 2008, automobility among senior citizens grew quite significantly, in particular in the older age groups. The background to this is primarily more older women who are sitting at the wheel themselves and more often have a car at their disposal than previous female senior citizens.

- Car sharing organisations are finding their members in the major towns where more than every tenth household already has at least one membership. However, the actual utilisation does not keep the same pace. Four out of ten car sharers almost never make use of the service. Even the remaining car sharing customers only use these vehicles mainly sporadically. Shared cars are therefore most likely to represent an occasional option with low proportion of vehicle mileage.

### Beginnings of a transport turnaround are visible but not nearly completed

- The frequently discussed transport turnaround is only recognisable in urban areas, but even there, is not yet achieving the desired overall dynamic. Overall and primarily outside the towns the car remains by far the number one mode of transport, in particular when looking at passenger kilometres. In addition, changes are currently being driven, sometimes more through structural effects such as (re-) urbanisation and the growth in employment than through transport improvements.
- The developments to be ascertained in terms of a somewhat reduced rate of mobility and the number of day-to-day trips can also be identified in a similar form in the current national mobility surveys in Great Britain and the USA. This suggests, despite all differences, parallel developments in the western industrial societies.
- However, under the surface of average values for events in passenger transport, different and sometimes opposing developments can be recorded. These run along the age limits and show so-called 'cohort effects'. While day-to-day mobility is no longer so clearly influenced by the car in particular among the younger generations, its importance among the older generations is growing. A further divide runs between town and country, also with a more diverse mobility in the towns and a continuously growing automobility in the rural areas. A third complex comprises aspects of social participation. Thus, the level of mobility reduces in economically weak households while it stays the same at the other end of this scale or even goes against the trend in some segments.