



Ministerie van Infrastructuur
en Waterstaat

Summary

Key Mobility figures

2022




Netherlands Institute for Transport Policy Analysis | KiM




Summary

Developments up to 2021

Passenger mobility was slightly higher in 2021 compared to 2020, but still remained well below the 2019 level. In particular, the use of trains and buses, trams and metros (BTM) showed a sharp decline compared to 2019, as did air travel.


Passenger mobility	Total ¹	Car (driver)	Car (passenger)	Train	Bus, tram, metro	Bicycle	Walking	Air traffic
	Distance travelled in the Netherlands (bln km)							Distance travelled by Dutch citizens (bln km)
2021	155.7	80.3	30.3	9.6	3.0	15.8	8.1	37.3
2021 vs 2020	+9%	+6%	+16%	+9%	+3%	+4%	+25%	+47%
2021 vs 2019	-23%	-22%	-20%	-52%	-46%	-11%	+59%	-62%

Freight transport also saw a slight uptick again in 2021. The overall transport performance in 2021, measured in tonne-km, even slightly exceeded that of 2019. Road transport performance in particular showed growth in recent years.

Freight transport	Total	Road transport	Rail transport	Inland shipping	International pipeline
	Distance travelled in the Netherlands (bln tonne-km)				
2021	135.1	64.5	7.2	47.4	16.0
2021 vs 2020	+4%	+3%	+8%	+5%	+8%
2021 vs 2019	+2%	+3%	+1%	+1%	+1%


¹ Total transport performance and transport performance for travel by car (driver and passenger), bicycle and foot, shown separately in this table, are based on the CBS trend model; transport performance for travel by train and bus, tram and metro (BTM) obtained from CROW-KpVV/NS. Total transport performance is therefore not entirely equal to the sum of the transport performance of the individual modes.

Accessibility relates to both the traffic and transport system (how fast can I reach certain activities?) and the spatial system (which activities are within my reach?). The number of jobs, educational facilities and shops in the Netherlands that can be reached within an acceptable travel time shows an upward trend between 2010 and 2018. Traffic volumes and travel time losses on main roads were slightly higher in 2021 than in 2020 due to growth in passenger mobility and freight transport. They still remained below the 2019 level, however. Train delay time decreased.

Accessibility 	Jobs, education, shops within acceptable travel time ²	Road traffic Total	Road traffic Main road network	Travel time loss Main road network	Train delays
	Number	Distance travelled (bln vehicle-km)		Time (mln hours)	Time (min per trip)
2021	-	128.1	63.6	26.8	1.3
2021 vs 2020	-	+4%	+4%	+13%	-13%
2021 vs 2019	-	-9%	-13%	-62%	-24%

Traffic developments can influence **road safety**. Despite the slight increase in road mobility, road deaths in 2021 were slightly lower than in 2020, continuing the decline that started in 2018.

Motorised traffic causes **emissions**. But road traffic is getting cleaner: emissions of nitrogen oxides (NOX) and particulates produced by combustion (PM10 combustion) from road traffic have shown a declining trend for some time. Greenhouse gas emissions from road traffic also decreased in recent years. Due to the COVID-19 pandemic, the decreases were relatively more pronounced over the past few years, mainly due to the drop in car traffic. Particulate matter caused by wear (PM10 wear) kept pace with road traffic volume.

Traffic safety & Emissions 	Traffic deaths	Greenhouse gases road traffic	NOX road traffic	PM10 road traffic combustion	PM10 road traffic wear
	Number	Emissions (megatonnes of CO ₂)	Emissions (mln kg)		
2021	582	25.4	54	0.83	2.74
2021 vs 2020	-5%	-0.4%	-4%	-6%	+5%
2021 vs 2019	-12%	-15%	-19%	-24%	-6%

² This refers to the indicator as operationalised in the Integral Mobility Analysis (IMA). Data is available for 2010, 2014 and 2018.

An uncertain future

The future has always been uncertain, but the pandemic, the war in Ukraine and China's increasingly threatening posture towards Taiwan have only compounded that uncertainty. That is why, where possible, we outline possible developments using three scenarios: a base scenario, a less scenario and a more scenario. The scenarios differ in terms of environmental uncertainties (including economic and demographic developments), temporary and structural effects of the COVID-19 pandemic, and current and potential supply shortages (public transport scaling down and chip shortages affecting e-bike production). Assumptions that are less favourable to mobility growth are grouped in the less scenario, while those that are more favourable are in the more scenario. The base scenario sits broadly in the middle. The following picture emerges from these scenarios:

Road traffic: Road traffic on the main road network rises above 2019 levels in 2023 under the base and more scenarios. Under the less scenario, this happens in 2024. For 2027, we estimate a growth in distance travelled of 14% (base scenario), 20% (more scenario) or 7% (less scenario) compared to 2019. Congestion growth may not be as strong as before for some days due to better distribution as more people now work from home.

Train: Train traffic is set to exceed 2019 levels in 2026 according to the base scenario. In the more scenario, this takes place in 2024, while in the less scenario it does not happen until after 2027. In 2027, compared to 2019, there will be a growth of 3% (base scenario) or 19% (more scenario), or an 11% decline (less scenario).

BTM: According to the base scenario, bus, tram and metro traffic will exceed 2019 levels in 2024. In the more scenario, this takes place in 2023, while in the less scenario it does not happen until after 2027. In 2027, compared to 2019, there will be a growth of 6% (base scenario) or 19% (more scenario), or a 9% decline (less scenario).

Bicycle: Bicycle traffic is predicted to exceed 2019 levels in 2022 under the base and more scenarios. In the less scenario, the 2022 level will remain roughly equal to 2019. In 2027, compared to 2019, there will be a growth of 9% (base scenario), 12% (more scenario) or 8% (less scenario).

Freight transport: Transport performance already exceeded 2019 levels in 2021. For 2027, we estimate 8% growth compared to 2019.

Air traffic: Air passenger numbers are expected to rise above 2019 levels around 2025. We predict 7% growth for 2027 compared to 2019.³

The prediction that mobility across various modes of transport will exceed 2019 levels in the longer term is based on demographic and economic developments, among other factors.

Forecast	Road traffic main road network	Travel time loss main road network	Bicycle	Train	BTM	Freight transport	Air traffic
2027 vs 2019	Distance travelled (vehicle-km)	Time (hours)	Distance travelled (km)	Distance travelled (passenger-km)		Distance travelled (tonne-km)	Passenger movements (bln)
Less scenario	+7%	Smaller increase	+8%	-11%	-9%		
Base scenario	+14%	Increase	+9%	+3%	+6%	+8%	+7%
More scenario	+20%	Larger increase	+12%	+19%	+19%		

³ This is based on adopted targets as included in the KEV 2022 (no more than 500,000 flights at Schiphol, no commercial flights at Lelystad airport and no additional aviation tax).

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