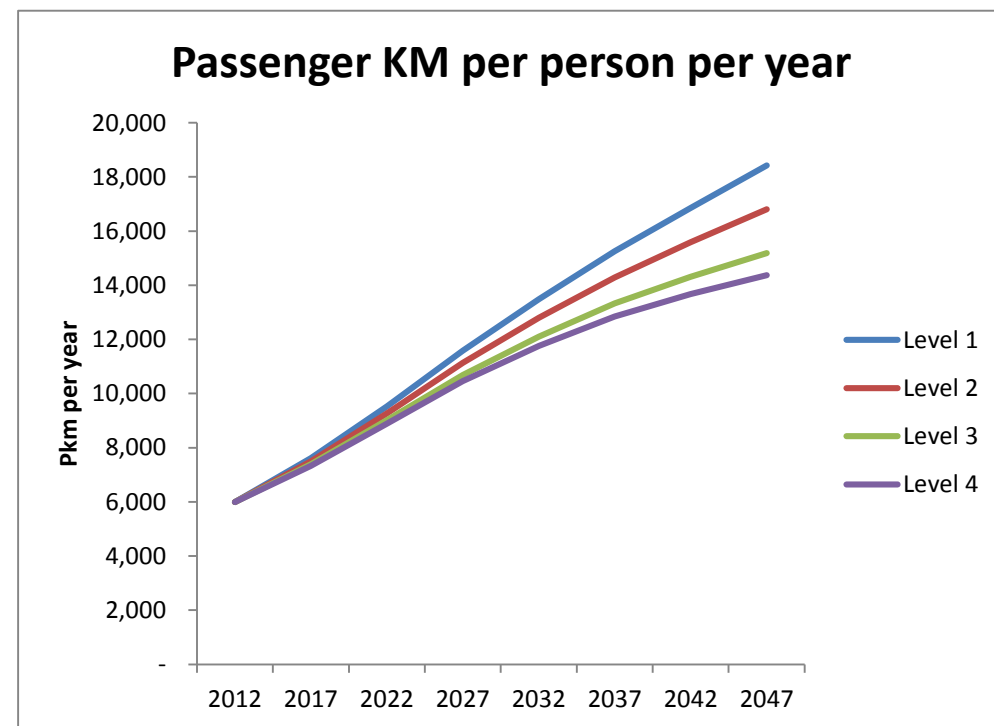


DOMESTIC PASSENGER TRANSPORT DEMAND

The average distance travelled annually per person in India in 2011-12 was only 5,992 km. The same statistic in the EU in 2009 was 11,700 km; in the UK in 2012 was 14,500 km; while in the US it was about 28,000 km per year in 2010-11. With increased economic development, there is expected to be an increase in mobility and demand for both inter-city and intra-city passenger transport in India over the next few decades. These numbers refer to Scenario 1 of GDP (7.4% CAGR).



LEVEL 1

Level One assumes a steady increase in the per capita demand for transport over the next four decades. From current levels, distance travelled annually per person is expected to increase to 18,420 km by 2046-47. Improved access to transport infrastructure, accompanied by increasing demand for mobility due to increased economic activity would lead to an increase in total passenger transport demand. Distance travelled per capita will rise steadily for both intercity and intra city travel.

LEVEL 2

Level Two envisions a rise in the number of activity centres across the country, thereby reducing the demand for inter-city travel of people migrating for employment opportunities. Better planning and improved urban designs would also lessen intra-city travel distances. This Level would see a drop in the overall annual demand for mobility per capita by about 9 per cent from the mobility demands envisioned by 2046-47 in level one, reaching 16,803 km by 2046-47.

LEVEL 3

Level Three visualizes a world where all new cities that come up in the country in the next four decades plan for Transit Oriented Development, and there is a conscious effort to incorporate similar best practices in pre-existing urban centres. Smart, IT enabled transport infrastructure enabling better route optimization for commute trips further helps in reducing the transport demand per person. Annual per capita passenger transport demands would thereby be moderated by about 18 per cent over the present mobility demands envisioned by 2046-47 under level one, reaching 15,186 km by 2046-47.

LEVEL 4

Level Four is a world where the growth of passenger transport demand would be moderated by conscious policy initiatives on urbanization patterns and transport demand management. Realization of targeted economic development in the rural sector will significantly reduce demand for transport of migrant workers seeking employment in urban centres. The measures for Transit Oriented Development would get strengthened further, with focus on minimizing the need for commute trips and other trips for daily needs. Further improvement in IT and IT enabled services would markedly reduce demands for both intra and inter-city passenger travel. All these initiatives would reduce the annual per capita passenger transport demands by about 26 per cent over the passenger transport demands envisioned by 2046-47 under level one, reaching 14,377 km by 2046-47.