

MARCH 2021

European public opinion poll shows support for shifting flights to rail

Background

2021 is the European Year of Rail – an important political opportunity to improve European rail travel as a contribution to the European Green Deal. A strengthened European rail system could (1) better connect people and businesses in Europe, (2) reduce transport emissions by creating alternative options to road transport and aviation, and (3) give a green boost to the European economy post-Covid-19.

The Europe On Rail coalition has commissioned a public opinion poll to showcase the attitudes of Europeans towards rail transport in general, international rail travel and the willingness of people to shift from air to rail.

International research and data analytics firm YouGov polled 6,309 adults (aged 18+) between 28th January and 4th February 2021, across five countries: Poland, the Netherlands, Germany, Spain and France. The survey was carried out online. The figures have been weighted and are representative of all country adults (aged 18+). Germanwatch can provide the YouGov raw data upon request.

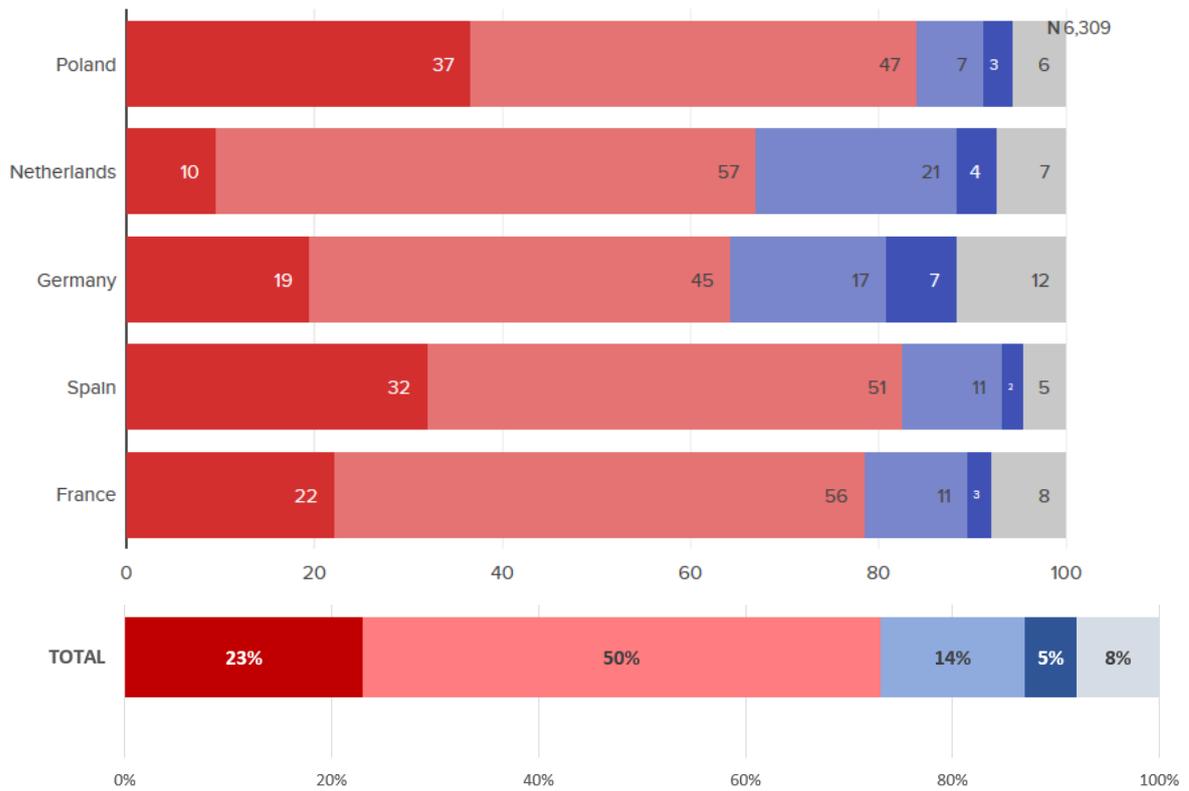
Citizens are concerned about transport emissions and are willing to shift from air to rail

Transport emissions account for a quarter of the European Union’s greenhouse gas emissions. Nearly three quarters of adults (73%) say that transport emissions are a serious problem in their country. People in Poland and Spain are particularly concerned (84% and 83% respectively).

Nearly three quarters say transport emissions are a serious problem

Thinking about all modes of transport (e.g. cars, planes, buses, trains etc.), how serious of a problem, if at all, do you think the amount of greenhouse gas emissions created by transport is in your country?

● Very serious ● Fairly serious ● Not very serious ● Not at all serious ● Don't know



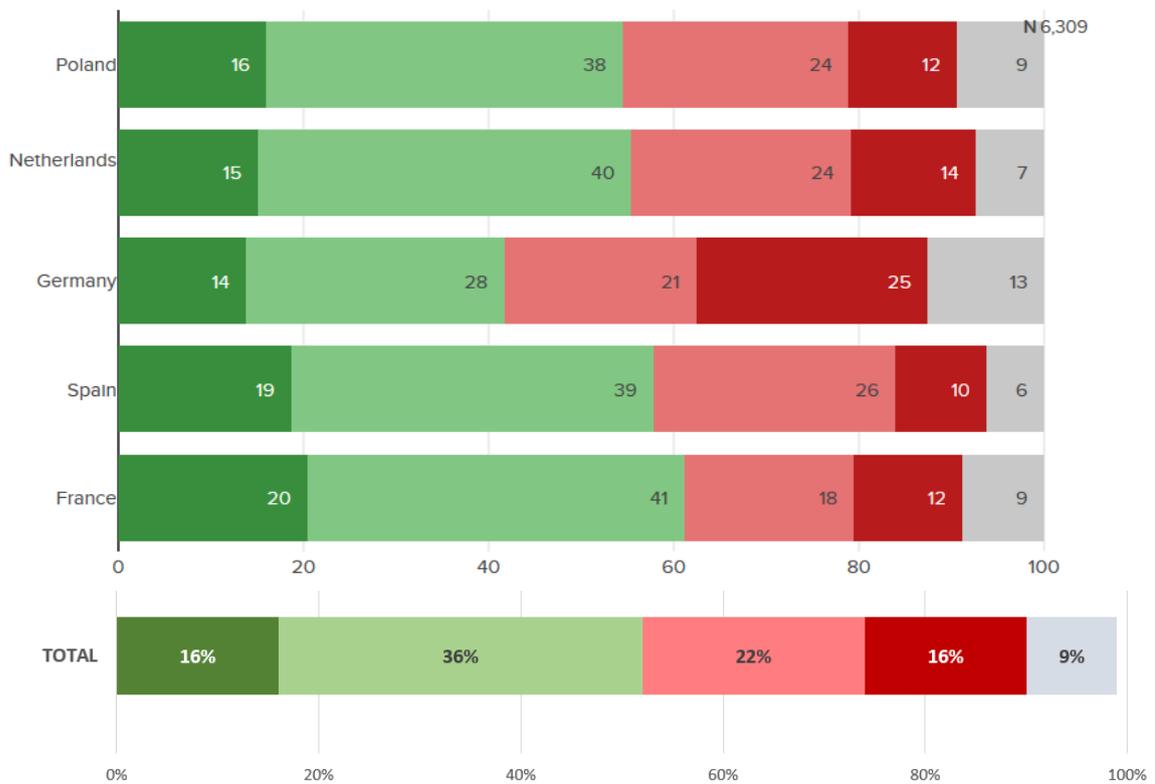
Over half of the citizens are interested in replacing flights with rail (52%). Here it is important to note that the 52% include 31% of respondents who say they never fly internationally and 62% who never use domestic flights. Many of these respondents may have chosen the categories “Not at all interested” or “Don’t know”.

Interestingly, the willingness to shift away from flights is high among frequent flyers (people who fly once per month or more often). Among the frequent flyers, more than half (53%) say they would be likely to replace 50% or more of their pre-coronavirus flights with rail travel.

Half of the citizens are interested in replacing flights with rail

How Interested, if at all, would you personally be in replacing flights that you may take with rail travel, if it was available to you at a price you consider reasonable?

● Very interested ● Fairly interested ● Not very interested ● Not at all interested ● Don't know



It is often said that rail is only competitive against air travel, if the rail travel time is under 4 hours because this is more or less what it would take to get to the airport, check-in, fly and get to the final destination. Yet, the polling showed that 37% of European adults would be willing to accept even travel times above 5 hours. 23% even said they would spend 7 hours or more on the train to replace a flight. There are large differences between the countries: in Poland, even 53% of people would be willing to travel longer than 5 hours, compared to only 25% in Germany.

37% are willing to spend more than 5 hours on a train to replace flights

What would be the maximum amount of time you are willing to spend on a train for a journey that you could have taken by plane?

	Poland	Netherlands	Germany	Spain	France	TOTAL
Longer than 7 hours	37%	26%	14%	23%	23%	23%
Longer than 5 hours	53%	42%	25%	42%	40%	37%
Longer than 3 hours, up to 5 hours	16%	22%	20%	22%	24%	21%
Longer than 1 hour, up to 3 hours	10%	12%	23%	20%	17%	18%
Up to 1 hour	2%	2%	5%	3%	3%	3%
Not applicable - I would not be willing to take the train/ would always choose to fly	7%	9%	16%	5%	6%	10%
Don't know	11%	13%	12%	8%	10%	11%

Citizens show large interest in international rail travel

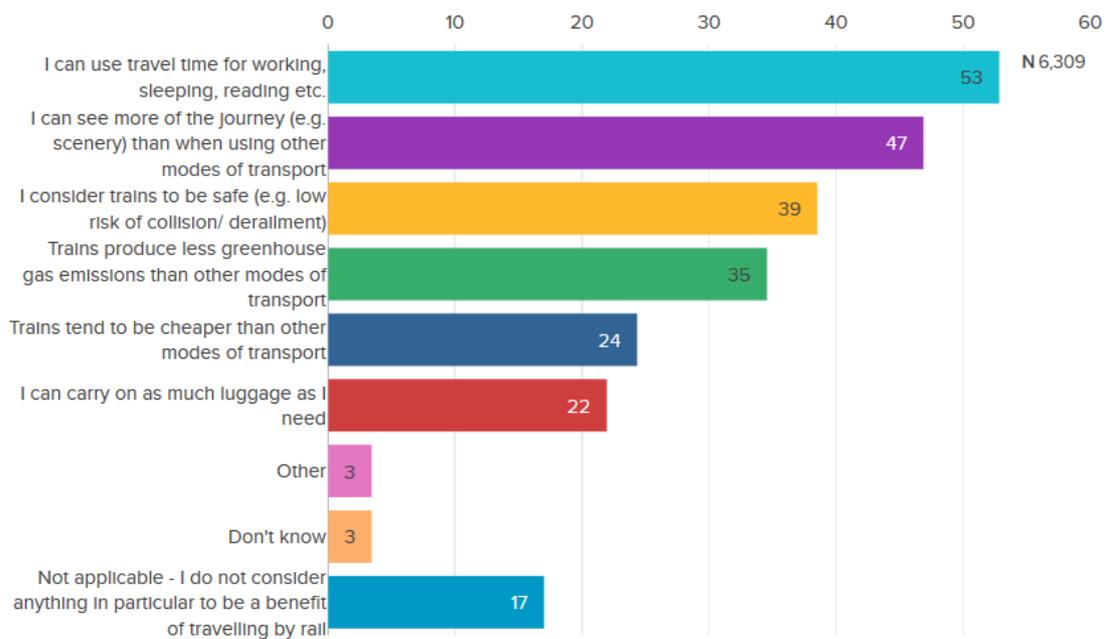
When asked for the main benefits of rail travel, people surveyed say they appreciate that travelling by rail allows them to use the travel time for working, sleeping and reading (53%), that they can see more of the journey (47%) and that trains are safer (39%) and more climate-friendly (35%).

- In Poland, safety is a bigger concern (58%) than in other countries, and many people say that trains are cheaper than other transport modes (48%). The most selected benefit in Poland was the use of time (66%).
- In the Netherlands and Germany, people see the main benefits in the use of travel time, seeing more of the journey, and rail being climate friendly.
- In France and Spain, the top benefits are the use of travel time, seeing more of the journey and the safety of rail travel.

Yet, the reputation of rail is somewhat damaged in Germany and Netherlands, where 29% and 21% respectively say they do not see any benefit in travelling by rail.

Main benefits of rail travel

Which, if any, of the following do you personally consider to be the benefits of travelling by rail compared to travelling by other modes of transport? (Please select all that apply)

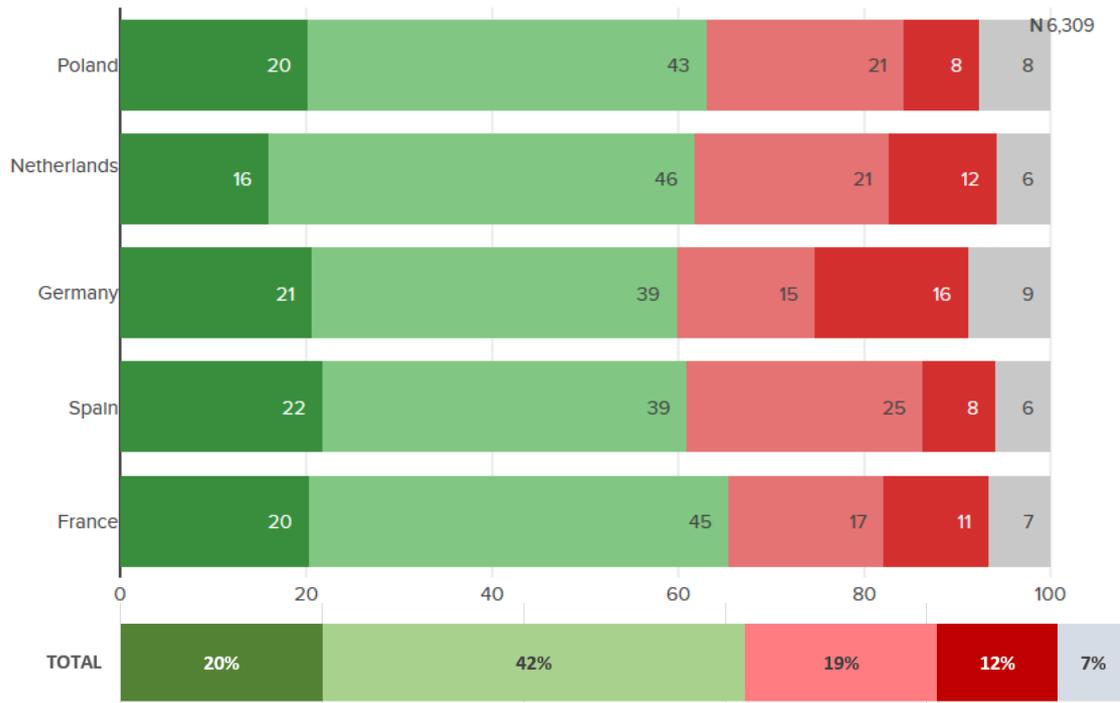


Although 45% of adults in Europe say they never take an international train (in France even 52%, in Germany 51%), the interest in doing so is large. Almost two-thirds (62%) say they are interested in taking a train for European travel. The level of interest is very similar across the five countries. Interestingly, half of the people that never use international rail would like to do so. People in France, Poland and Spain are particularly interested. This signals a significant untapped potential.

62% are interested in taking trains for European travel

How interested, if at all, would you personally be in taking trains for European travel in general (i.e. at any time of day) if it was available to you at a price you consider reasonable?

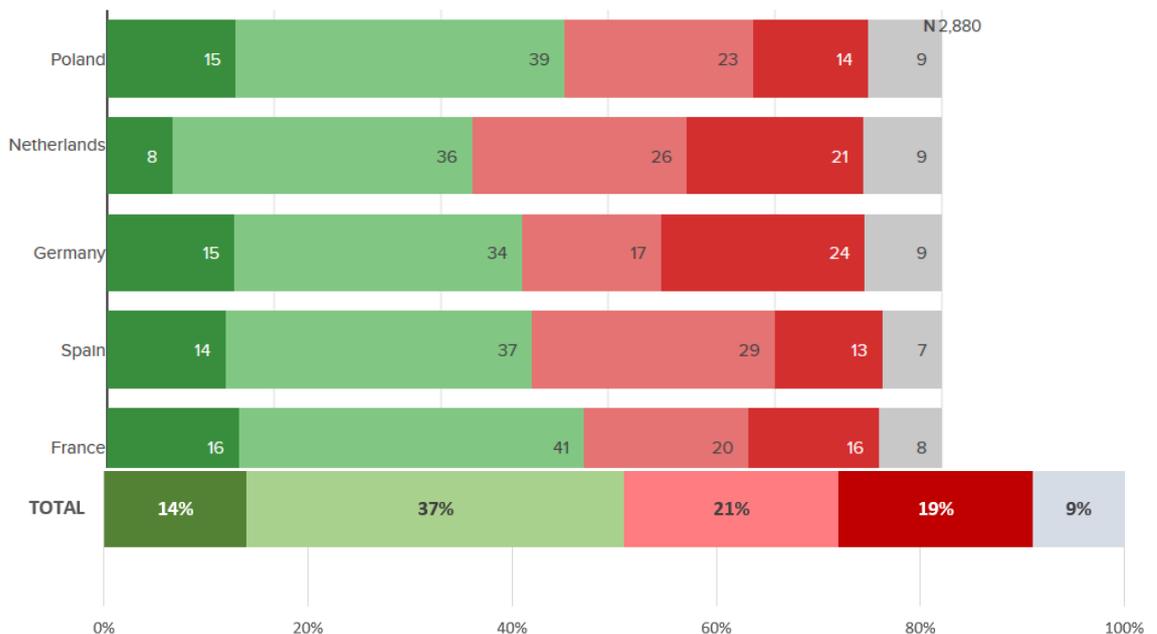
- Very interested
- Fairly interested
- Not very interested
- Not at all interested
- Don't know



Untapped potential: People that never travel by international rail are interested in taking European trains

How interested, if at all, would you personally be in taking trains for European travel in general (i.e. at any time of day)?

- Very interested
- Fairly interested
- Not very interested
- Not at all interested
- Don't know



Night trains are popular across countries and ages

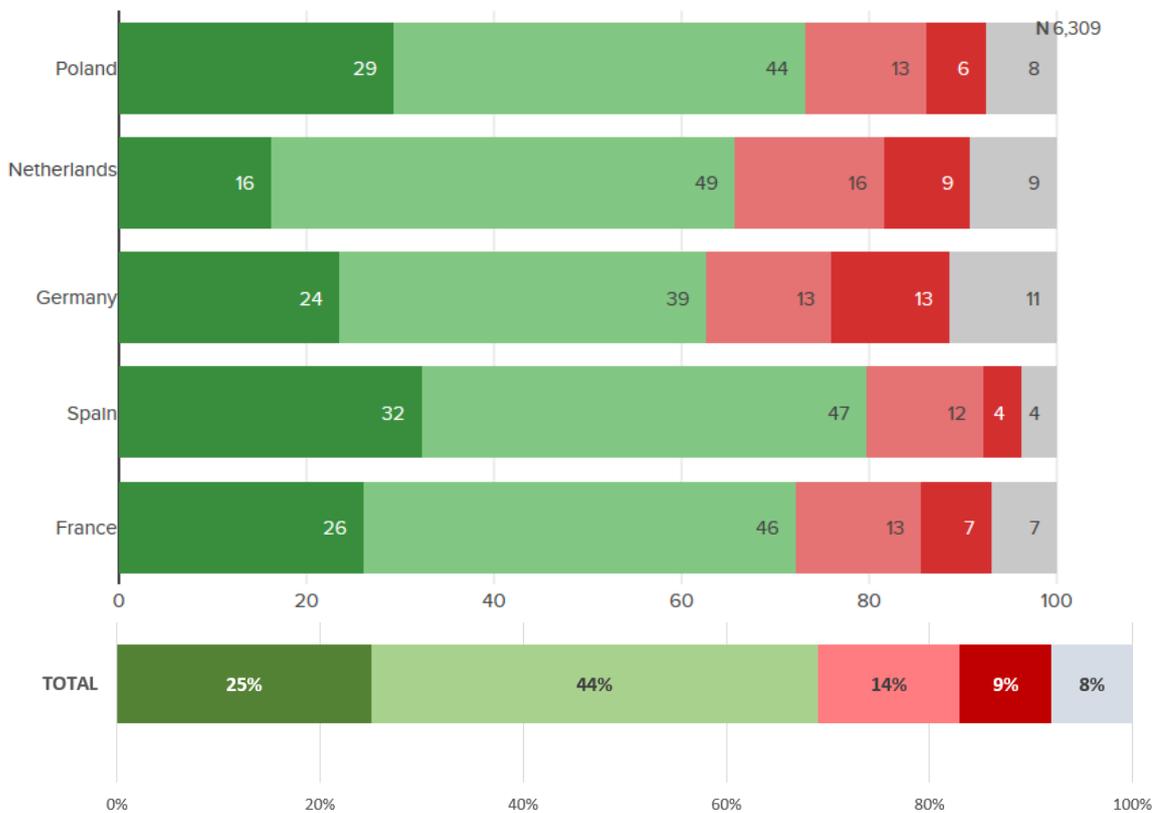
Night trains are currently seeing a renaissance in Europe. After decades of reports about the closing of night train lines, European governments and rail operators are turning around. Austrian rail operator ÖBB is expanding its NightJet network across Europe; the French government announced the reintroduction of ten night train lines, and the Swedish government wants to start a night train to Brussels.

The significant interest people in night trains showed in the poll support this development. Two thirds (69%) say they would take night trains if it was available at a reasonable price. People in Spain (80%), Poland (73%) and France (72%) show the largest interest.

Two thirds are willing to take night trains

In general, how willing, if at all, would you be to take a night train for any journey, if it were available to you at a price you consider reasonable?

● Very willing ● Fairly willing ● Not very willing ● Not at all willing ● Don't know

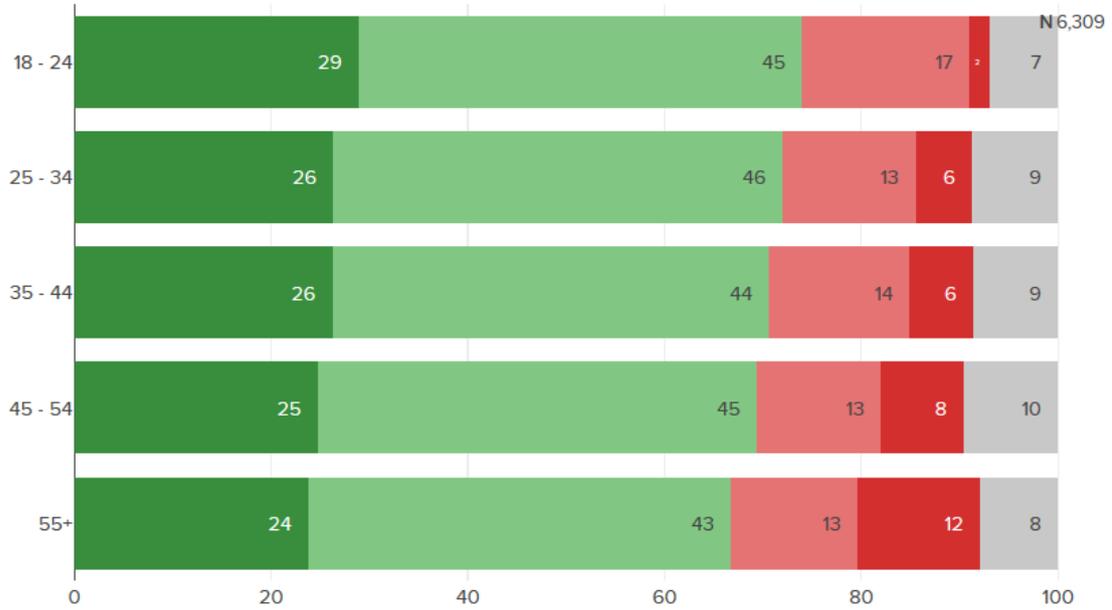


Interestingly, night trains are not only popular among young people but across all age groups. 74% of people aged 18-24 would take a night train, and even among people aged 55+ a significant share of 67% say they would do so.

People are willing to travel by night train, across all ages

In general, how willing, if at all, would you be to take a night train for any journey, if it were available to you at a price you consider reasonable?

● Very willing ● Fairly willing ● Not very willing ● Not at all willing ● Don't know



People support fair fares

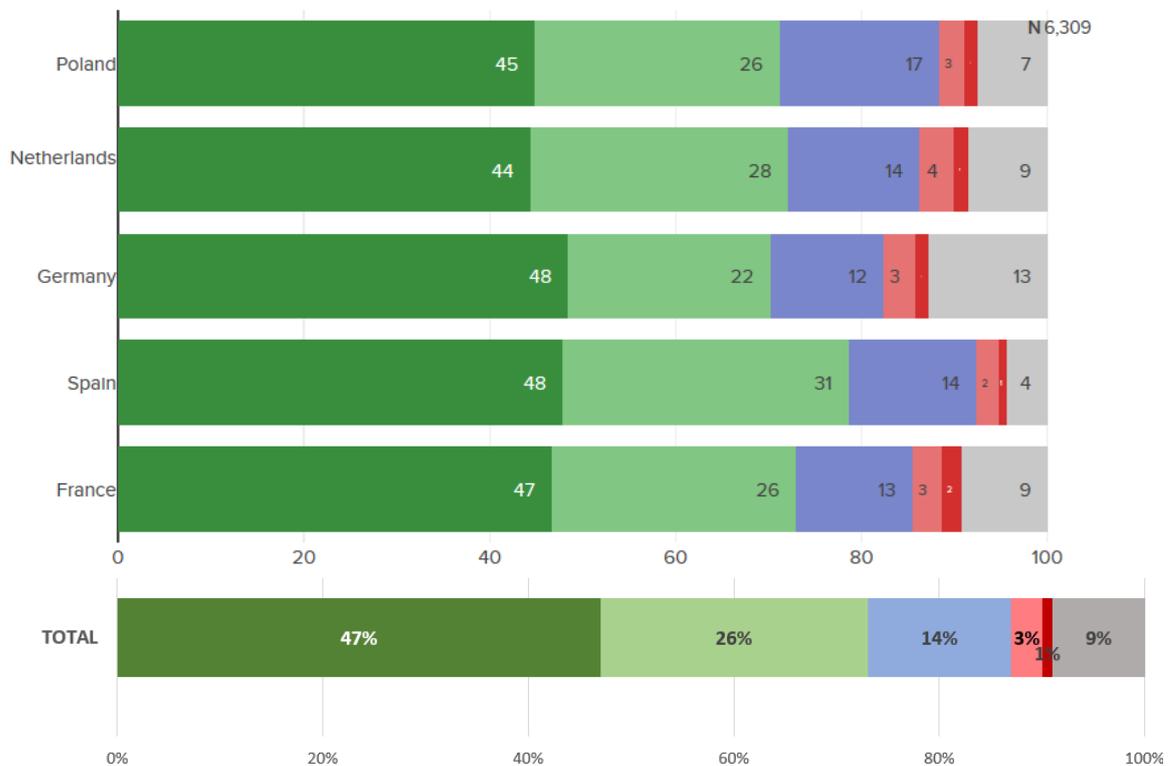
To translate the interest in travelling by rail into real changes, rail travel in Europe needs to become more attractive, and ticket prices are an important factor.

An overwhelming majority of adults across Europe (73%) say that travelling by rail should be cheaper than flying on the same distance (79% in Spain). This is not always the case as a 2020 [analysis by the Dutch Advisory Council for the Environment](#) showed. On the route Amsterdam-Paris or Amsterdam – Basel, for example, a flight ticket was only half the price of a rail ticket. One reason is the uneven tax burden: airlines in the European Union are exempt from fuel taxes, get a large share of their emission trading allowances for free and are exempt from VAT on international tickets. Another reason is that airlines offer a small segment of their tickets at very low prices, which creates the false public impression that flying is always cheaper.

Nearly three quarters say that travelling by rail should be cheaper than flying

Do you think that travelling by rail should be more expensive or cheaper than flying the same route/ an equal distance, or do you think these should cost about the same?

- Rail should be much cheaper
- Rail should be a little cheaper
- About the same
- Rail should be a little more expensive
- Rail should be much more expensive
- Don't know

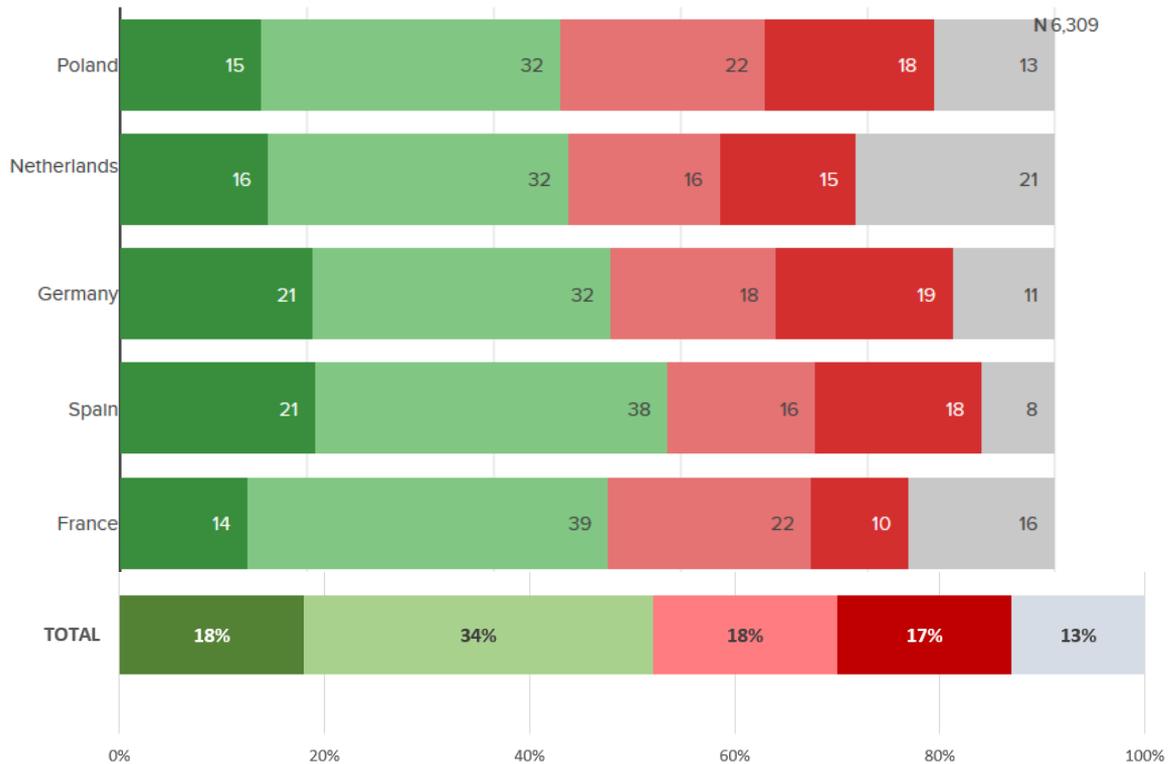


More than half (52%) of the people in the poll say they would support a carbon tax, knowing that this would result in higher ticket prices for more polluting transport modes. Only 35% would oppose such a tax. In all five countries, more people support than oppose a carbon tax. Support is particularly high in Spain (59%), Germany (53%) and France (52%). Interestingly, frequent flyers are more positive about a carbon tax than the average: with 60% in support of this.

Support for a carbon tax

A carbon tax would result in a higher price of tickets for travel on modes of transport that cause more climate damage. To what extent would you support or oppose a carbon tax in your country?

- Strongly support
- Tend to support
- Tend to oppose
- Strongly oppose
- Don't know



About EUROPE ON RAIL

Europe on Rail is a network of non-profit organisations from Poland, Germany, France, Spain and Brussels. The network seeks to build support for a rail renaissance in Europe and for respective policy measures to boost cross-border passenger rail transport.



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