Better Connected: Global Attitudes to Integrated Public Transport

How can more passengers be encouraged onto public transport within and between cities?

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FOREWORD FROM HITACHI RAIL CEO GIUSEPPE MARINO

As the populations of our cities grow, one of the most suitable ways to reduce carbon emissions, congestion and improve quality of life is to invest in more convenient, seamless and sustainable public transport.

And yet adopting greater public transport use, including delivering the necessary digital infrastructure and the green energy transformation will mean significant challenges for policymakers, operators, manufacturers and passengers.

And while planners share many common challenges, it is also clear that greater public transport uptake will only happen if it meets the needs and demands of its potential passengers, with strong leadership from policymakers and facilitated by new technologies.

That's why, for the second year in a row, we have commissioned research to understand what motivates peoples' travel decisions within and between cities. Our research covers the similarities and differences between London, Paris, Berlin, Copenhagen, Dubai, Singapore, Milan, Warsaw, Washington, Toronto, Sydney, and San Francisco.

Armed with these insights, we hope to help policymakers, operators and the wider industry partner more closely to deliver more seamless, sustainable public transportation.

From Honolulu to Copenhagen, Rome to Tokyo, Hitachi Rail has experience in delivering the high speed, commuter and urban railway systems that have transformed how people move within cities - and between regions and countries..

GLOBAL FINDINGS: PUBLIC TRANSPORTATION IS MORE POPULAR THAN YOU THINK

Our study shows that there is – universally – strong demand and a clear need for more public transport.

Over one-third (35%) of those surveyed in our research believe that they will travel more by train in the next five years. This is far higher than the corresponding responses for travelling more by car (17%) or plane (6%).

Perhaps most importantly, people recognise the value of public transport if it delivers more seamless travel. Almost half of respondents (49%) would support a more expensive public transport system if it was more convenient (versus 26% against), rising to 55% in favour if it were to be funded by increased road taxes.

There is also broad support for policymakers to fund high speed rail through greater air taxes (56%), and even to legislate to ban short-haul flights where good high-speed alternatives exist (64%).

But public transport needs to be better connected to take passengers from door to door as seamlessly as possible. Respondents were clear (78%) that with a better-connected public transport system, they would choose to travel by public transport more often..

TRAVELLING WITHIN A CITY? CONVENIENCE IS KING

The research shows that convenience – underlined by shorter journey times and frequent services – is the most decisive factor in determining whether people travel by public transport or not inside a city. And by and large, even in cities where car is king, the data shows that public transport is seen as being more convenient by comparison.

Turning to the barriers to using public transport, people are most likely to be put off because of overcrowding, with 78% saying that they would use public transport more if they could avoid crowding.

Perhaps unsurprisingly, one barrier related to overcrowding - Covid-19 safety measures - has however become far less of a concern. Having ranked top in our research a year ago, it is now one of the lowest ranked barriers.

This may in part be the result of better public awareness of the substantial impact that modern air circulation systems have on preventing the transmissions of viruses on public transport.

TRAVELLING BETWEEN CITIES? HIGH SPEED IS A BREAKTHROUGH

Overall, a majority (62%) of those surveyed fly or drive for long distance journeys as their default choice.

However, of these people, 75% would switch to a train if it was cheaper and 63% would switch to a train if it was an hour quicker.

This is borne out by respondents identifying the primary drivers for their long-distance travel decisions as cost, convenience and comfort, with cost the single most important determinant. The emphasis placed on comfort also explains the growing market for rail travel tourism, with passengers increasingly placing a premium on how they experience their travel. This has been underlined by the substantial recent growth in Europe of new or revived overnight sleeper train routes serving popular tourist destinations.

BETTER CONNECTED: IF YOU BUILD IT, THEY WILL COME

Hitachi Rail's experience in markets such as Japan, Italy and the UK demonstrates that modal shift away from cars and planes is possible – and can be very significant.

For example, over the last decade, thanks to the forward-looking policies of the Italian rail network, Italy has seen passenger growth of 517% on its high-speed lines, rising from 6.5m to 40m passenger journeys per year.

Examples like these show what is possible. Whether you are a policymaker, an operator, or part of the wider transport industry, we hope you will find useful insights from this research that can help drive greater support for more seamless, sustainable transport around the world.

Giuseppe Marino
CEO, Hitachi Rail

EXECUTIVE SUMMARY

This study draws on the attitudes of people across the world to understand what motivates their travel decisions within and between cities.

The study was undertaken by leading consumer research company Savanta ComRes and comprises the opinions of over 12,000 people (including more than 1,000 in each location), spread across 12 different key global cities: Washington D.C., San Francisco, Toronto, London, Paris, Berlin, Milan, Warsaw, Copenhagen, Dubai, Singapore and Sydney.

The selected cities incorporate a wide range of geographic, economic and transport infrastructure dynamics. They capture the views of people based in places where car, train, bus, cycling or walking dominates how people travel. The study builds on similar research published by Hitachi Rail in January 2023, and explores how attitudes have changed over the past year.

The study finds that while driving remains the most important mode of transport for the majority of people, other modes of transport are increasingly important, with train and bus ridership increasing by around one-third over the past year as part of a post-Covid revival.

There is also support for more investment in public transport to deliver greater convenience, whether funded via increased travel costs or more favourably, via increased taxes on other forms of higher polluting transport, e.g. through road charges.

Crowding remains the single biggest barrier to people using public transport, and increasing convenience – in the context of faster and more available journeys – remains the single most important driver for increasing usage.

Looking at intercity and long distance travel, the majority of people drive or fly when they travel further. Yet, over a third expect to travel more by train in the next five years, and it is clear that if train travel can deliver a cheaper or faster service then it will be the primary choice for the overwhelming majority of passengers. There is also support for creative and bold policymaking to help encourage more high speed rail.

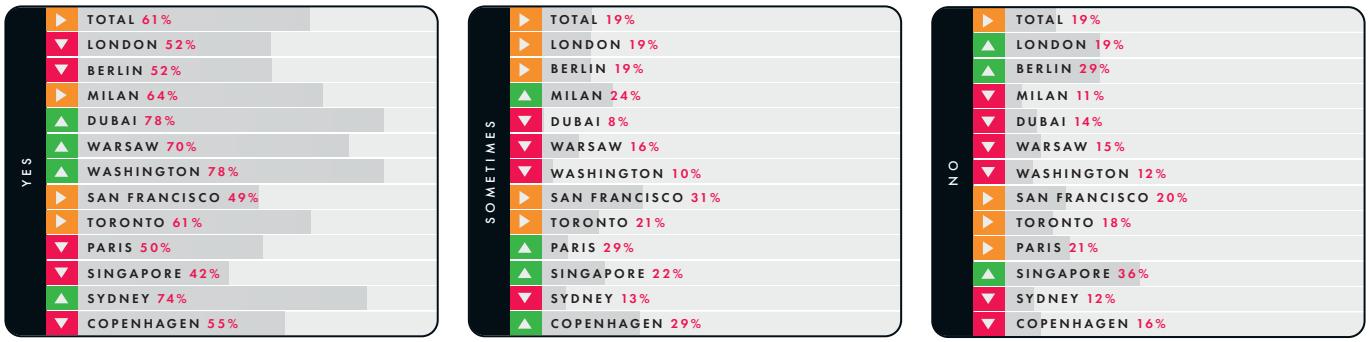
This study offers policymakers, operators and the wider transport industry insights into how we can most effectively deliver the green transport infrastructure that is needed globally.

HOW PEOPLE TRAVEL WITHIN CITIES

Our research shows that driving remains the primary form of transport in cities across the world. When examined more closely however, there is a more variable picture. While 80% of respondents do, at least, sometimes drive, this is down from 86% in last year's research. In cities such as Warsaw, Sydney, Washington D.C. and Dubai, regular driver numbers remain high, but in other cities such as Paris, Copenhagen and Singapore, there is a much higher incidence of occasional – rather than regular – driving.

DO YOU CURRENTLY DRIVE?

Total Net Yes: 80% - Note that driving in cities is down from 86% (net) in 2022

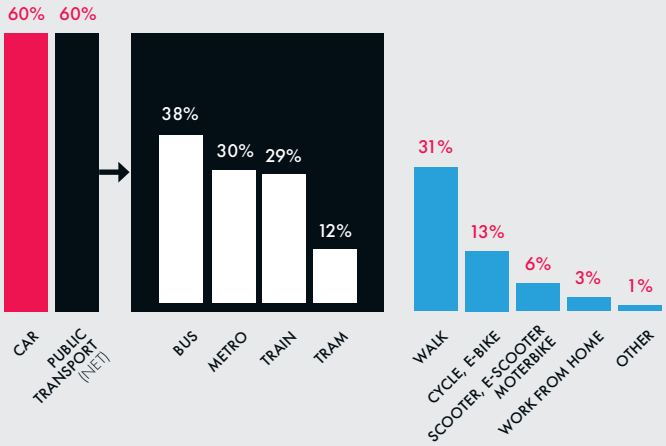


Significantly higher/lower compared to the total

HOW RESPONDENTS CHOOSE TO COMMUTE

When asked about commuting habits, respondents reported an even split, with 60% of commutes involving driving, and 60% also including public transport. Perhaps reflecting a post-Covid return to public transport and return to working in an office, bus ridership (38% vs 30%), train travel (29% vs 21%) and walking (31% vs 23%) are all up compared to last year's study.

HOW PEOPLE TRAVEL TO WORK



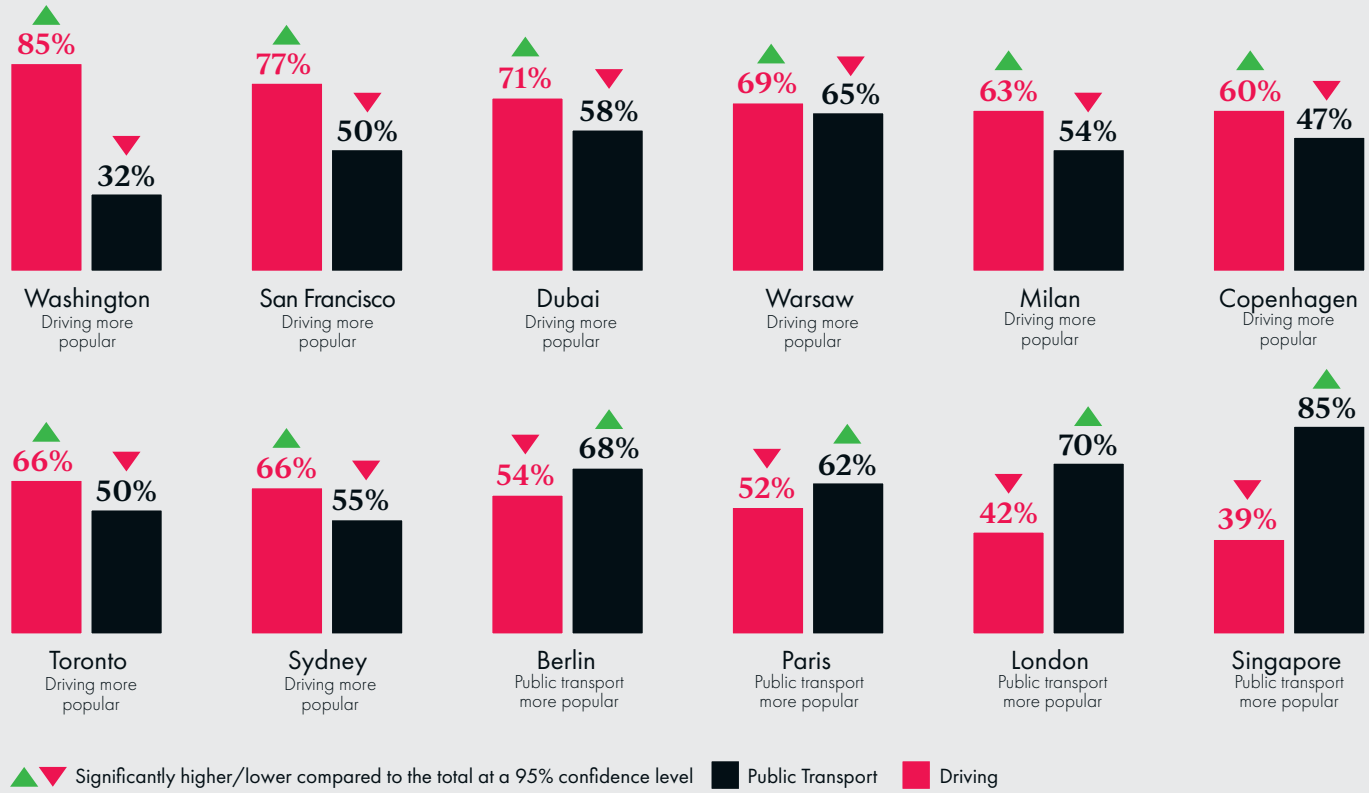
AGE TRENDS:

Younger ages are more likely to use both cars and public transport to travel, whereas older ages are more likely to work from home.

Most 18-54s are drivers, in line with the average, dropping to around half of 55+ year olds.

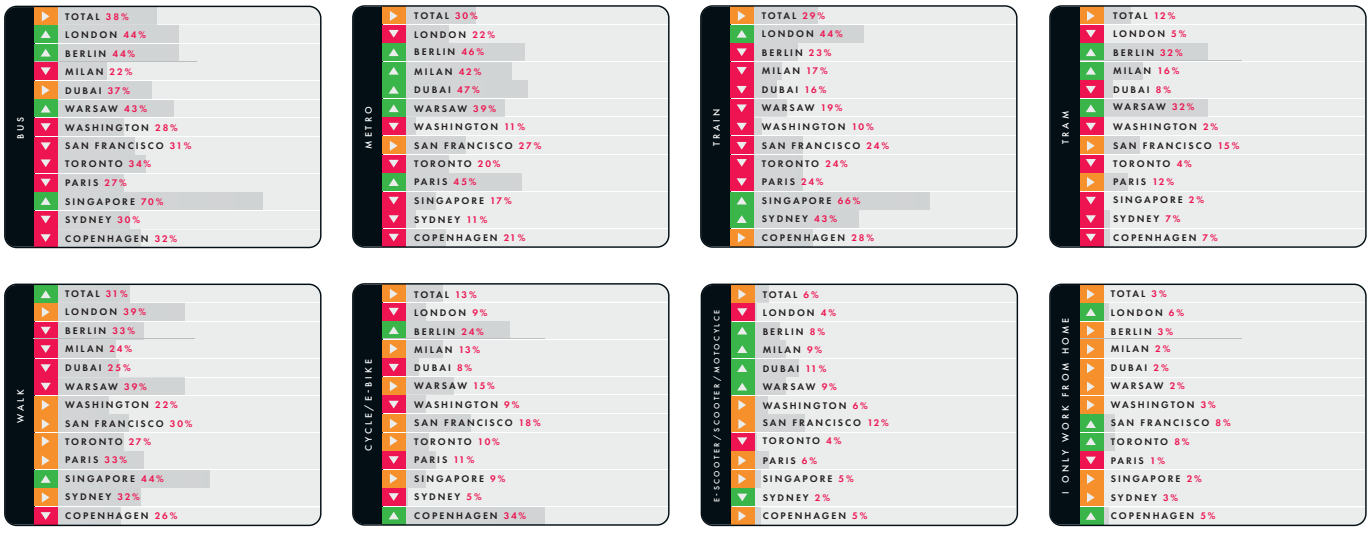
Public transport use correlates with age and decreases over time. A similar trend is seen with walking, cycling and scooter use.

COMMUTERS BY MARKET: DRIVE OR PUBLIC TRANSPORT (%)



There is also significant variation across the different cities in how much people rely on cars vs public transport for their commute. For example, while Singaporeans overwhelmingly favour public transport (85%), Washingtonians, in contrast are much more likely to drive (also 85%). Notably, London, Berlin, Paris and Singapore have the highest percentages of public transport users who forgo the car.

PUBLIC TRANSPORT COMMUTERS BY MARKET

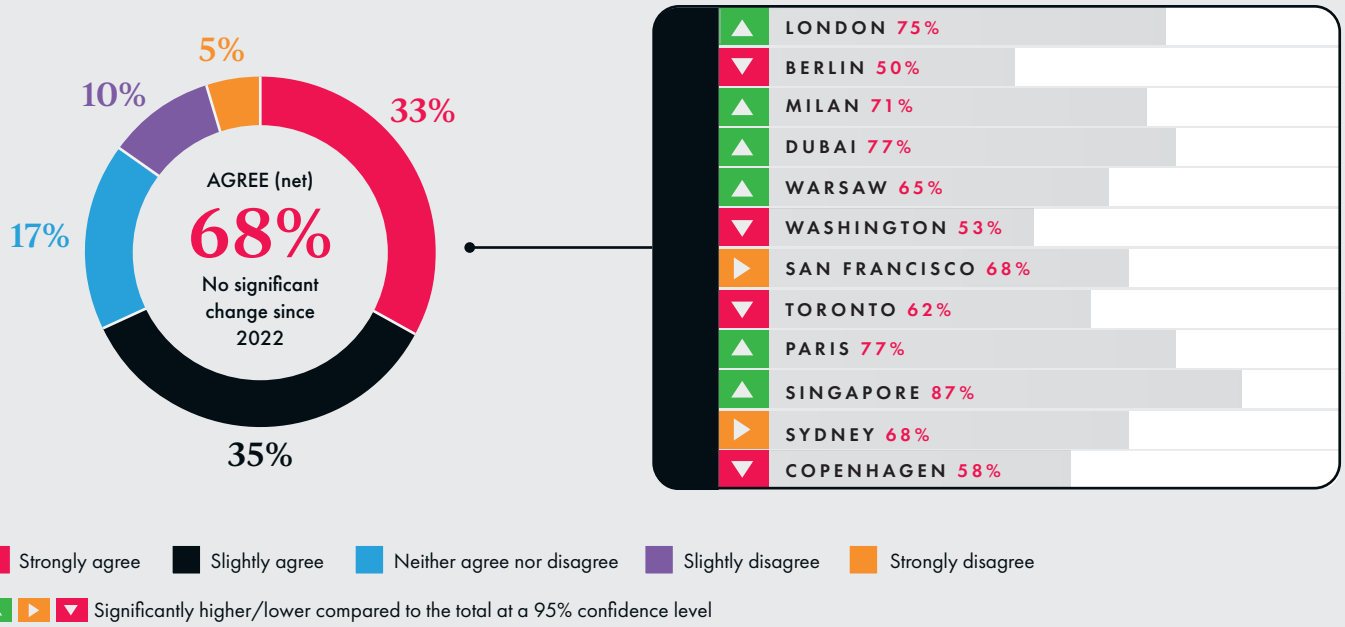


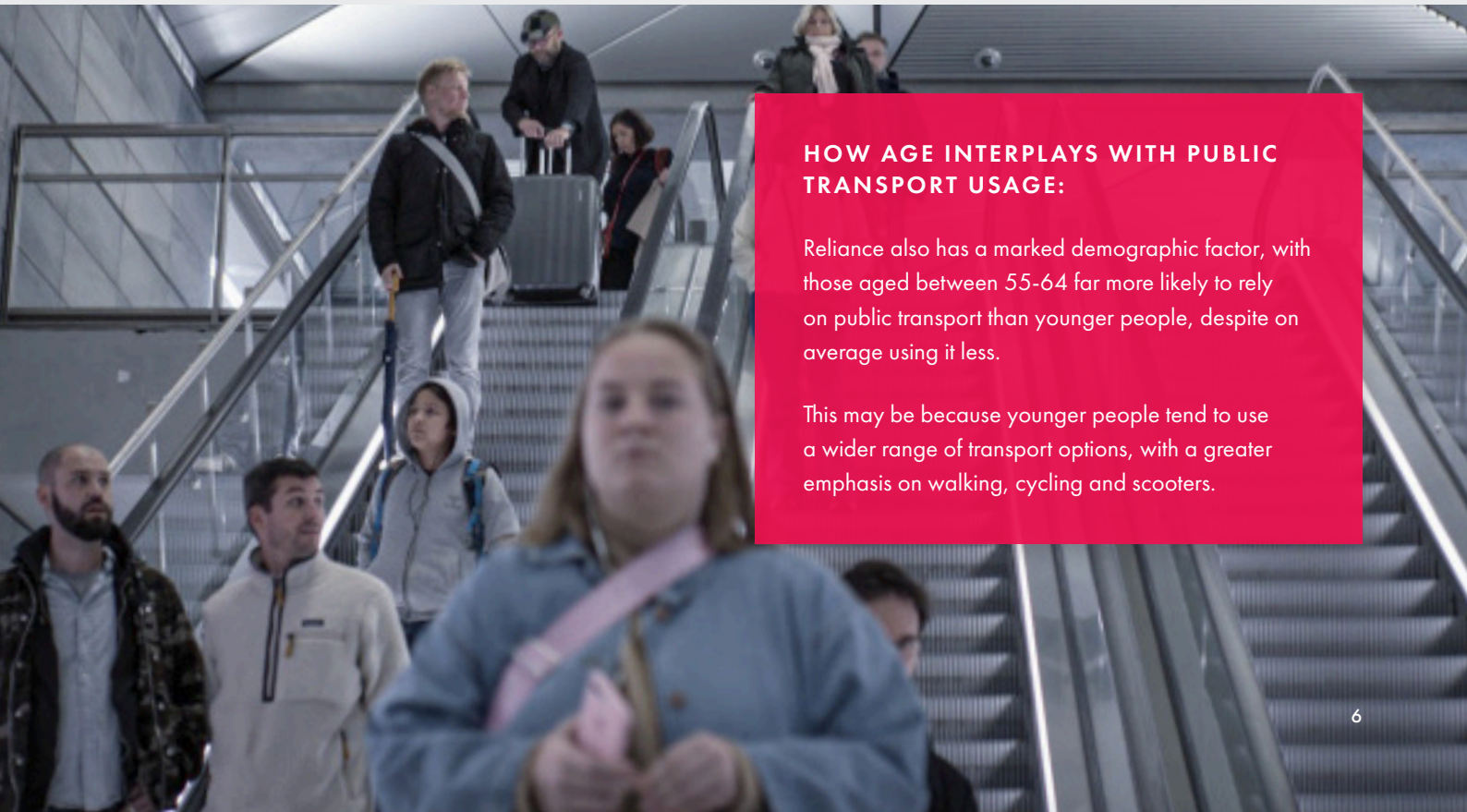
HOW CONVENIENT IS PUBLIC TRANSPORT?

Across the world, an average of 68% believing public transport to be convenient. This varies significantly between cities – with a high of 87% in Singapore and a low of 50% in Berlin – reflecting different transport infrastructure. Conversely, less than one in three say it is more convenient to drive (30%).

PUBLIC TRANSPORT IS CONVENIENT

All respondents (%) and Market split (Net agree %)





HOW AGE INTERPLAYS WITH PUBLIC TRANSPORT USAGE:

Reliance also has a marked demographic factor, with those aged between 55-64 far more likely to rely on public transport than younger people, despite on average using it less.

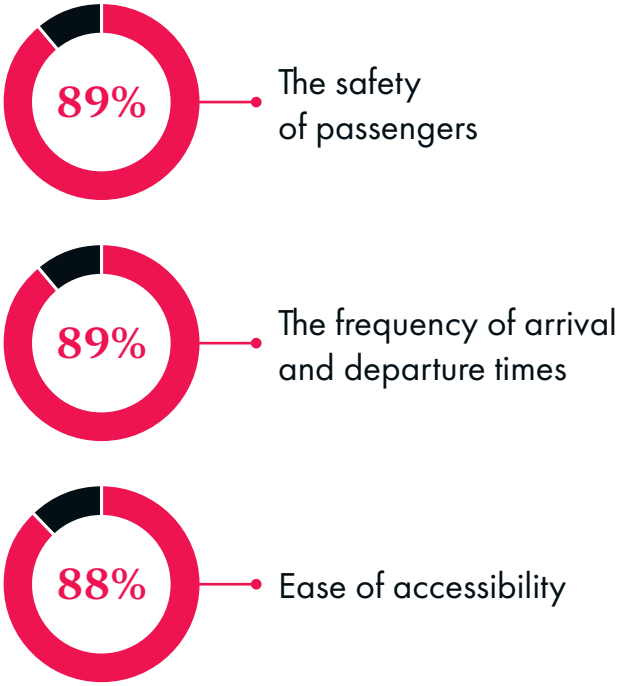
This may be because younger people tend to use a wider range of transport options, with a greater emphasis on walking, cycling and scooters.

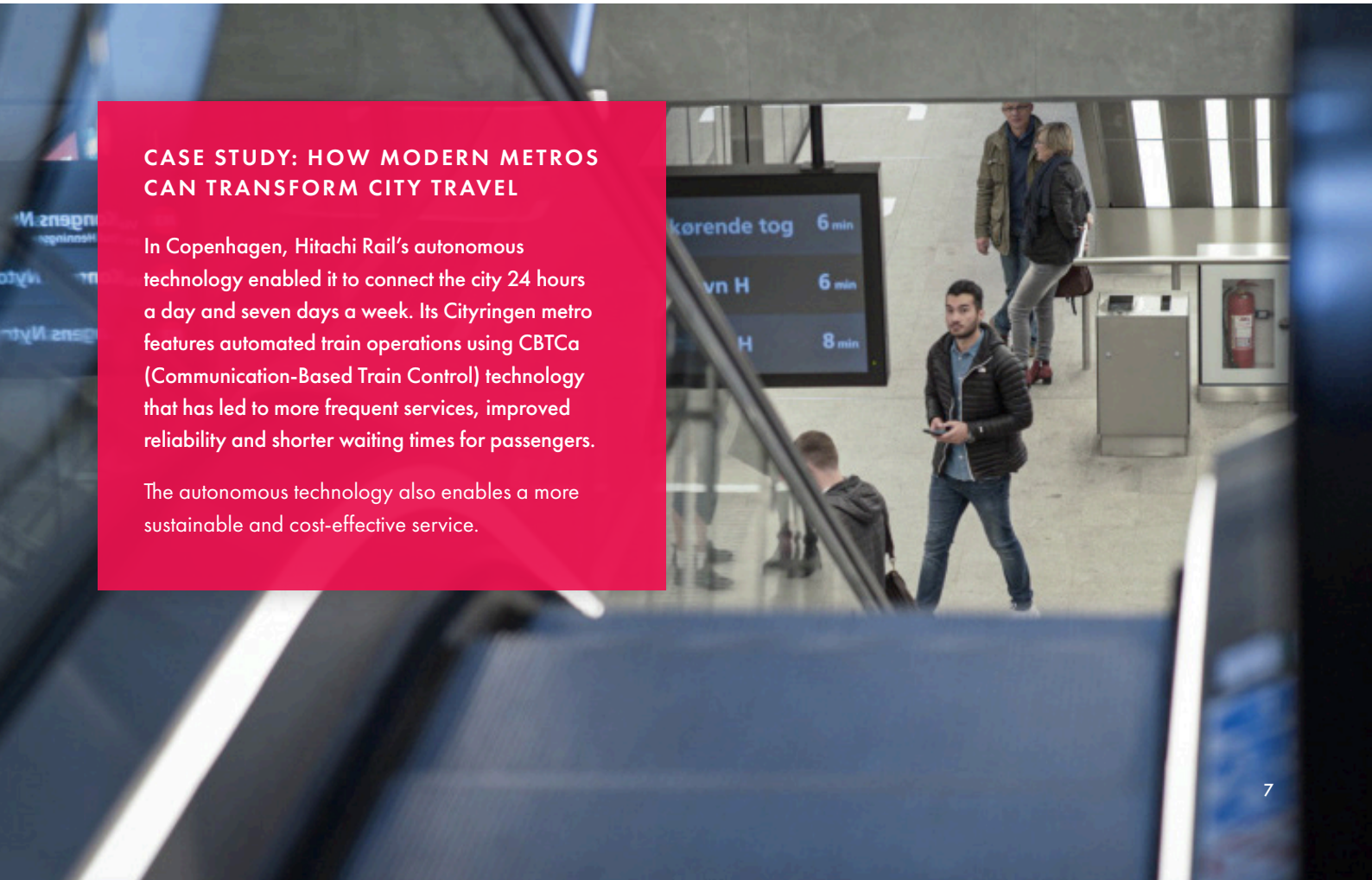
UNDERSTANDING WHAT SHAPES PEOPLE'S TRAVEL CHOICES

THE DRIVERS: THE 'THREE CS'?

The primary drivers for people's choice of travel within cities have shifted slightly since last year's iteration of this study. In 2023, people's transport decisions were defined by the 'three Cs', namely Cost, Comfort and Convenience. In our new research, while comfort and cost are still very important factors, respondents place extra emphasis on convenience – in terms of speed; frequency of service; and ease of accessibility – but also on safety. Convenience and safety now drive almost 9 in 10 transport choices around the world.

Notably for policymakers and transport partners, the desire to travel sustainably sits well down the list of motivating factors for passengers. Overall, two-thirds of people say they care about sustainability, but this ranges from as low as 50% in Copenhagen and 53% in Berlin through to much higher levels of engagement in Dubai (83%), Milan (73%), Singapore (72%) and Paris (71%). And so, while green travel is a desirable goal, promoting the sustainability credentials of public transport is unlikely to be successful strategy to motivate most people when they are making decisions about transport modes.





CASE STUDY: HOW MODERN METROS CAN TRANSFORM CITY TRAVEL

In Copenhagen, Hitachi Rail's autonomous technology enabled it to connect the city 24 hours a day and seven days a week. Its Cityringen metro features automated train operations using CBTCa (Communication-Based Train Control) technology that has led to more frequent services, improved reliability and shorter waiting times for passengers.

The autonomous technology also enables a more sustainable and cost-effective service.

IN THEIR OWN WORDS:
WHAT DO PASSENGERS EXPECT FROM PUBLIC TRANSPORT?

"To me a good public transport must be convenient (easy access), cost efficient (cheaper than driving) and high frequency especially during peak hour."

LONDON

"Fast, not crowded, convenient"

SINGAPORE

"You can enjoy a less stressful journey by letting someone else do the driving."

TORONTO

"Reliable, safe and less crowded services."

SYDNEY

"It should be clean and safe. It should also be frequent and reliable. It should lower my carbon footprint. It should be inexpensive."

WASHINGTON D.C.

"Comfort, not crowded, and accurate information about my journey"

WARSAW

"Clean, not too crowded, on time"

PARIS

"Avoid travelling pressed like Sardines!"

MILAN

"Arrives on time, is clean and neat, and the driver is friendly and helpful"

COPENHAGEN

"Punctuality, cleanliness, comfortable seats. Possibility to look out the window."

BERLIN

"You can rest while waiting to reach to your destination."

DUBAI

"Good temperature, good seats and feeling safe"

SAN FRANCISCO

DECLINING INFLUENCE OF COVID AS A DECISION ABOUT TRANSPORT MODES

On average, good Covid safety measures are deemed important by 66% of people – the joint lowest score of any of the different benchmarks.

This is a significant drop off from last year's research, where for comparison, Covid safety concerns was the primary driver and second largest barrier to using public transport. While crowding is still the biggest barrier, only 16% actively avoid crowded places because of Covid now, compared to 42% last time around.

WHAT ARE THE BARRIERS TO USING PUBLIC TRANSPORT?

Turning to the primary barriers, our research shows that people identify overcrowding as the single most off-putting factor to travelling by public transport at peak times.

There is however, significant regional variance. While Singaporeans particularly care about overcrowding (66%), it is the cost and greater convenience associated with driving that are identified as primary concerns by residents of Copenhagen, San Francisco and Washington D.C. respectively.

Equally, although only 23% globally listed personal security and safety concerns as a barrier, this is of far greater concern for people in Washington D.C., San Francisco and Toronto (40%, 51% and 40% respectively). And in Berlin and Paris, respondents also place greater emphasis on unreliability as a barrier to using public transport.

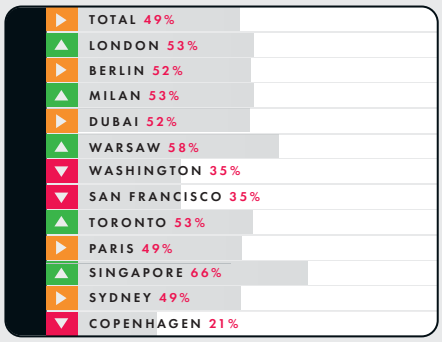
CASE STUDY: INCREASING SERVICE FREQUENCY WITH DIGITAL SIGNALLING IN SAN FRANCISCO

In 2020, Hitachi Rail was awarded a contract to replace the existing 48 year old train control system for the San Francisco Bay Area Rapid Transit District (BART), with Hitachi's new system for technologically controlling trains known as Communications Based Trains Control (CBTC).

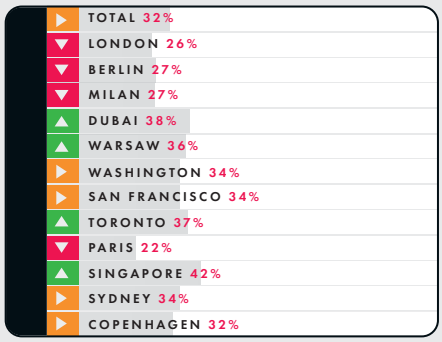
The CBTC system allows trains to safely operate on tighter schedules and at more closely spaced intervals, significantly increasing the lines throughput and passenger capacity. Hitachi's CBTC system will enable BART to meet the projected demand of over 30,000 Transbay passengers per hour at peak times, while providing the highest levels of safety.

OVERALL TOP 5 BARRIERS TO USING PUBLIC TRANSPORT

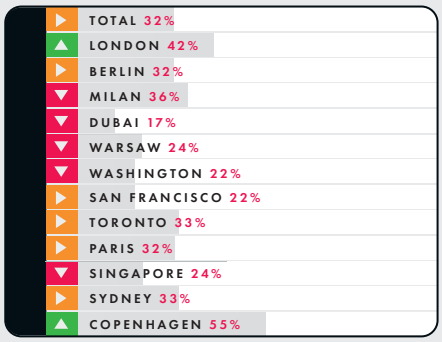
OVERCROWDING AT PEAK TRAVELS TIMES



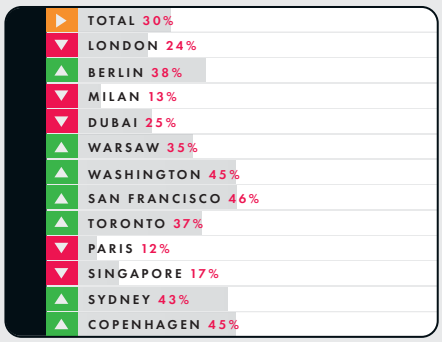
LENGTH OF JOURNEY TIME ON PUBIC TRANSPORT



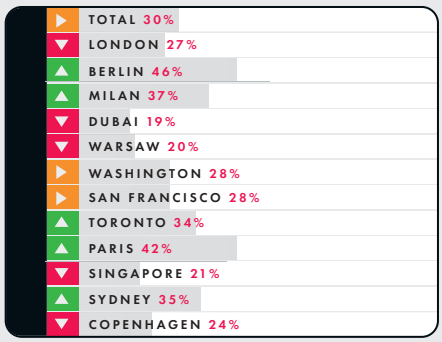
THE COST



IT'S MORE CONVENIENT TO DRIVE



UNRELIABLE DEPARTURE AND ARRIVAL TIMES



AGE TRENDS:

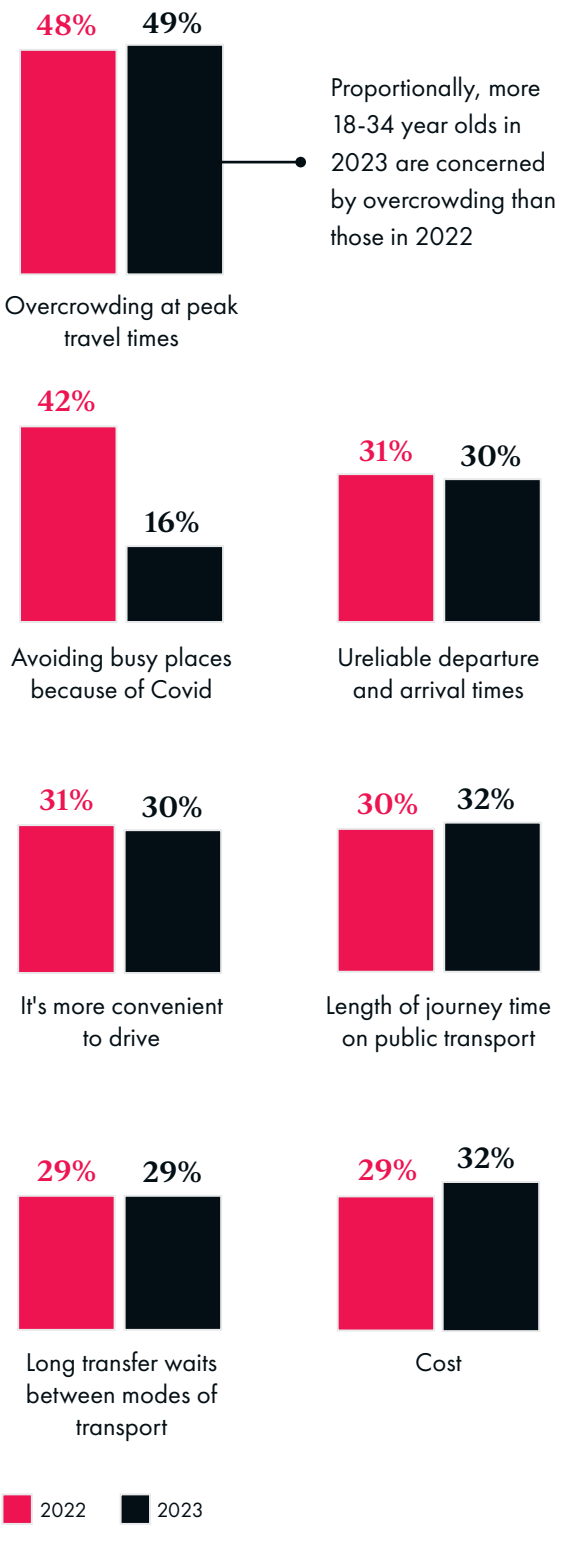
The top three factors putting people off public transport are fairly consistent across different age groups.

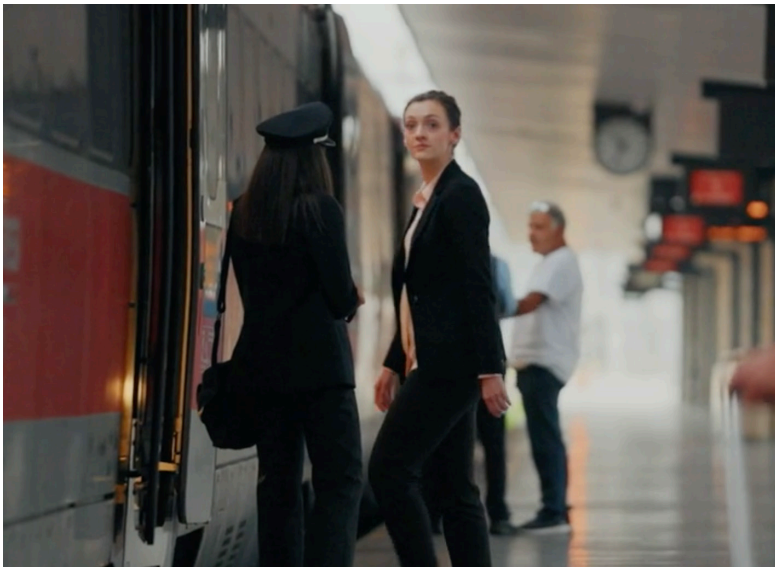
However, 29% of 18-24s say they are put off because public transport is dirty or smelly - rising to 39% among youth in Paris.

Significantly higher/lower compared to the total at a 95% confidence level

Notably, despite global cost of living rises in 2023, there is little change in the public's concern about transport prices (a 1% increase), although Copenhagen is a clear outlier, where passengers identify cost as by far and away the greatest barrier.

THE LARGEST BARRIERS TO USING PUBLIC TRANSPORT - 2022 VS 2023





HITACHI RAIL'S VIEWPOINT: HOW TO MOTIVATE GREATER PUBLIC TRANSPORT USAGE?

Hitachi Rail works with governments and transport operators around the world to deliver public transport systems – both the trains and signalling systems – that transform how people travel. As a business, the key to delivery is understanding what our customer, and ultimately the passenger, needs.

Our research again emphasises the importance of convenience in meeting the passengers demands, finding that eight- in- ten would use public transport more if it offered the shortest journey time. While seven- in- ten would also be encouraged if public transport was cheaper and more reliable.

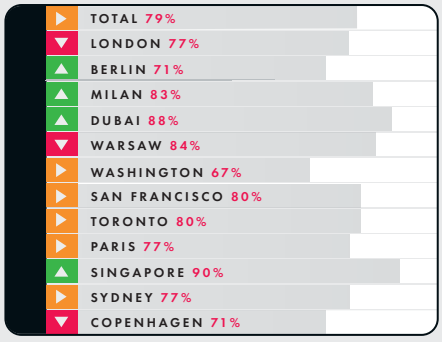
Drilling down into these numbers we can see that for current non-users, 73% would be tempted to switch to public transport for shorter journey times, 66% if it was more reliable and 63% if it was cheaper. When comparing regular users with non-users it is also apparent that the latter place greater relative emphasis on passenger safety (ranked 2nd as a motivator vs 5th).

Our research also shows that three quarters (74%) of people would be more likely to use public transport if they could look ahead for live service updates. This is as high as 81% in San Francisco and Milan; 82% in Warsaw and 85% in Paris, and provides clear guidance to city planners as to where gains can be made in growing public transport usage.

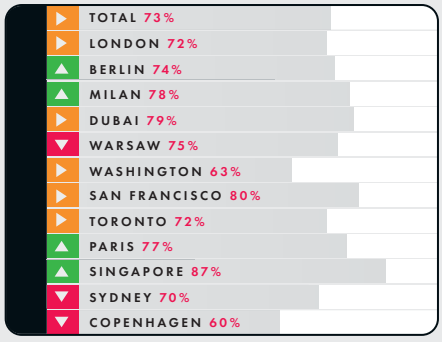
TOP FIVE REASONS: "I WOULD USE PUBLIC TRANSPORT MORE IF..."

All respondents (Net agree %)

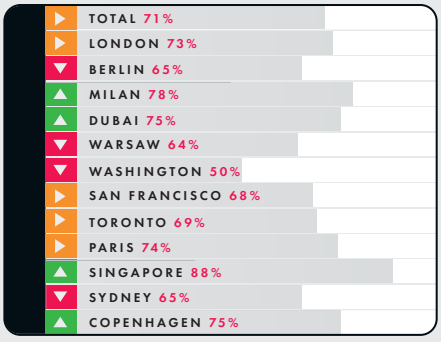
...I KNEW IT OFFERED THE SHORTEST JOURNEY



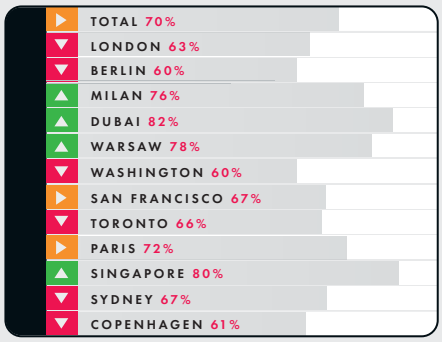
...IT WAS MORE RELIABLE



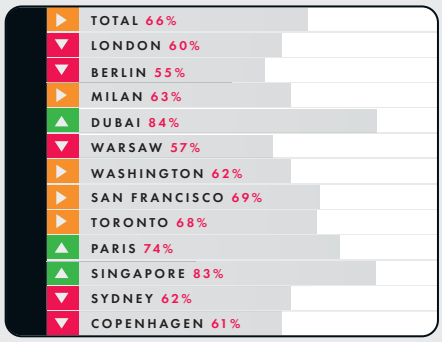
...IT WAS CHEAPER



...IT OFFERED MORE SERVICES



...IT WAS EASIER TO USE

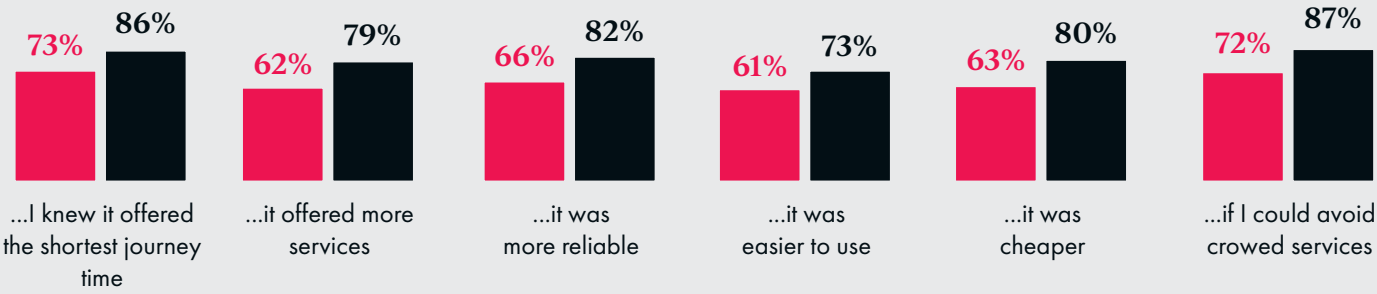


Singapore and Dubai show significant appetite across the board, while those in Washington show less interest.

No significant change to agreement with any of these statements since 2023

"I WOULD USE PUBLIC TRANSPORT MORE IF..."

Public transport users versus non-users (Net agree %) User Non-user



TOP 5 FACTORS DRIVING ITS USE

Public transport users versus non-users (Net important %)

USERS	NON-USERS
The frequency of arrival and departure times **91%**	The frequency of arrival and departure times **88%**
Convenience **90%**	The safety of passengers **88%**
Easily accessible locations that fit y travel route **90%**	Convenience **87%**
Convenient time schedule i.e. early and late services **89%**	Easily accessible locations that fit my travel route **87%**
The safety of passengers **89%**	Convenient time schedule i.e. early and late services **85%**

BETTER CONNECTED PUBLIC TRANSPORT CAN TRANSFORM HOW WE TRAVEL

WHAT ROLE CAN DIGITAL SERVICES PLAY?

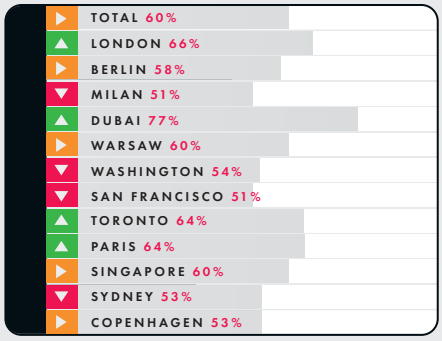
The last decade has seen the advent of digital services such as transport planning apps, which have enabled passengers to plan and book their travel. These types of services can help provide some of the solutions e.g. access to reliable service timetables, that people have identified as being either a major driver for, or barriers to, travelling by public transport.

Our research into their usage and their value shows that well over half (60%) of respondents now use apps to plan and book their travel.

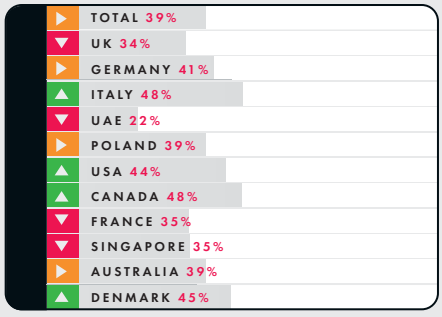
USE OF MOBILE APPS

Market split (Net users %)

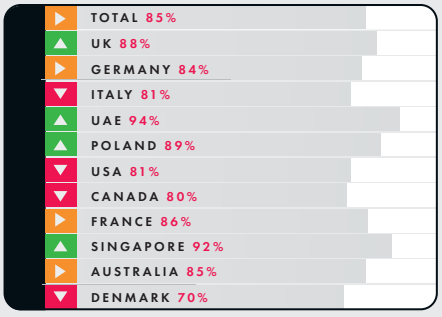
NET ALL THE TIME OR QUITE OFTEN



NET NOT THAT OFTEN OR NEVER

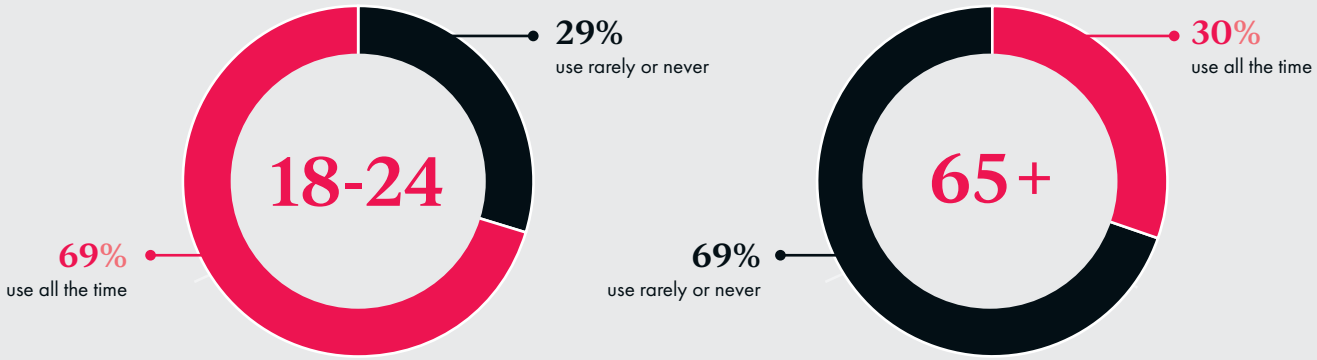


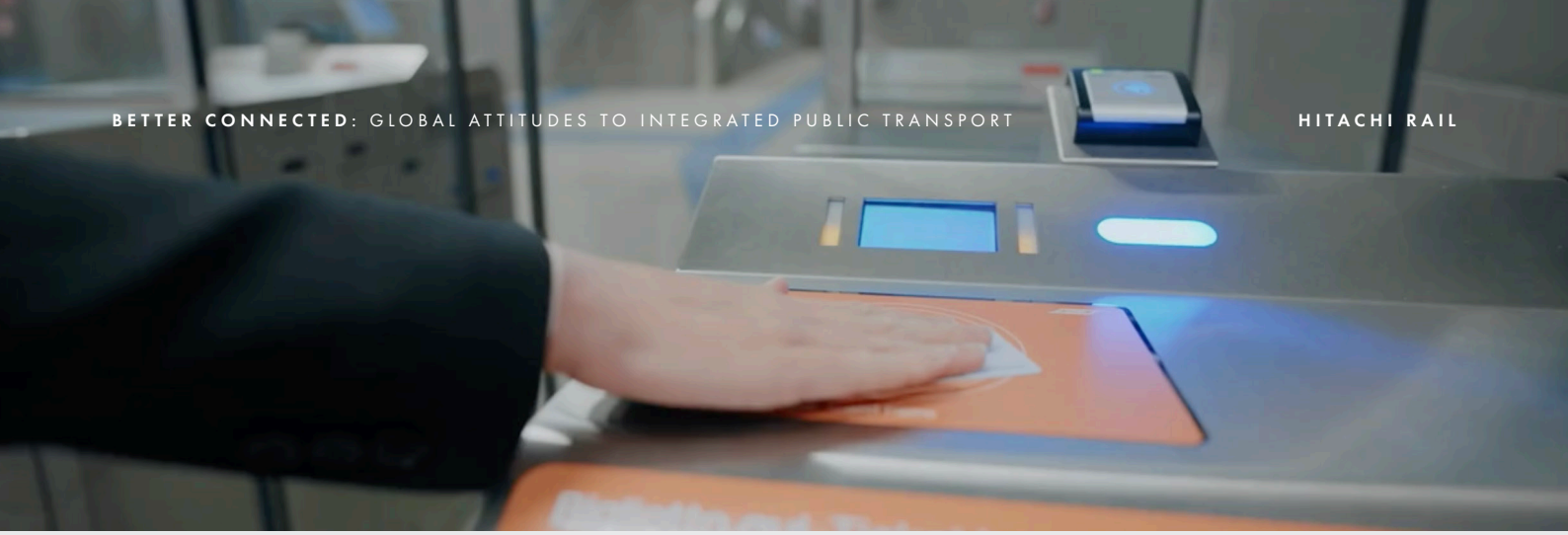
NET EVER



AGE TRENDS

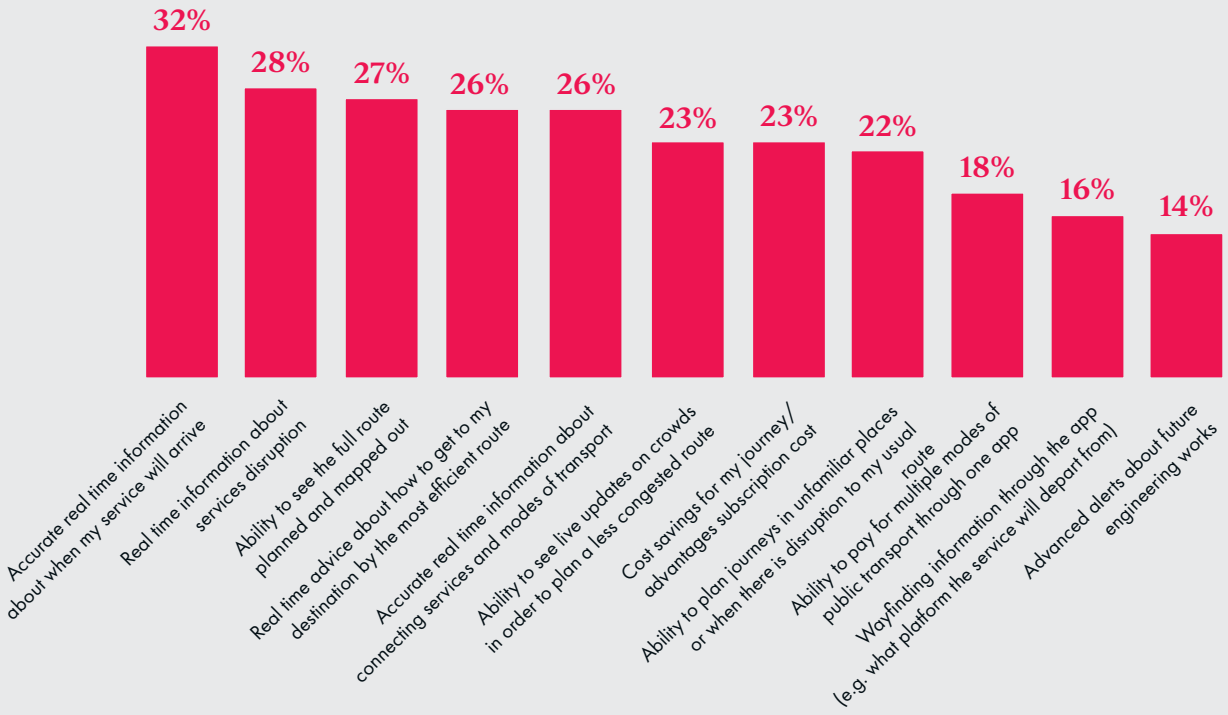
Regularity of usage tends to correlate with age:





USE OF MOBILE APPS

Market split (Net users %)



And for those that use apps, the biggest benefit is to have accurate real time information about when their service will arrive, and whether there are any disruptions. While in Copenhagen, people highlighted the value of being able to find the cheapest travel option.

WHAT IS THE DEMAND FOR BETTER CONNECTED PUBLIC TRANSPORT?

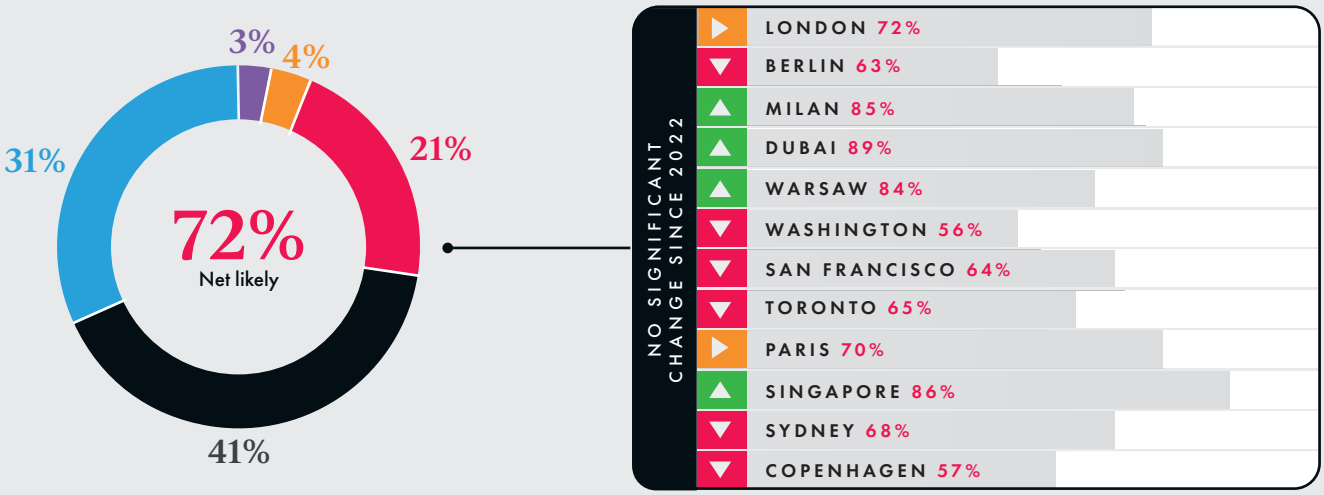
Our research finds high levels of support (72%) for better connected transport across cities. This presents cities, often facing budget constraints and significant competing demands, with the challenge of how they can deliver a better connected system.

WHAT DO WE MEAN BY 'BETTER CONNECTED'?

By a 'better connected' public transport system, we mean a system where all elements of transport, such as trams, metros, trains, buses, bicycles, e-scooters, taxis, and parking, are planned and work together; allowing easier connections between public transport types, more frequent and faster journeys, clear information about services, offering viable alternative routes to cars, and reducing overcrowding and delays.

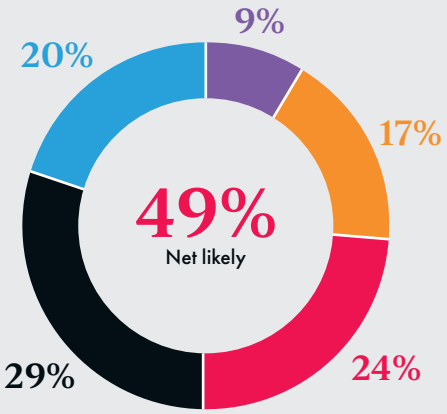
LIKELIHOOD TO USE PUBLIC TRANSPORT WITH A BETTER CONNECTED SYSTEM

All respondents (%)



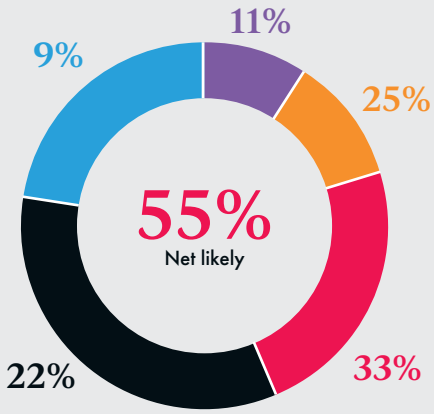
LIKELIHOOD TO USE PUBLIC TRANSPORT IF IT WAS MORE CONVENIENT AND COST MORE:

All respondents (%)



LIKELIHOOD TO SUPPORT ROAD USER CHARGERS TO AID CHEAPER AND BETTER CONNECTED PUBLIC TRANSPORT

All respondents (%)



Strongly agree | Slightly agree | Neither agree nor disagree | Slightly disagree | Strongly disagree

Significantly higher/lower compared to the total

Our research shows that half of respondents (49%) would support a more expensive public transport system if it was more convenient, with only 26% being less likely to use it. Again though there is the caveat of significant variance between places e.g. 70% support in Dubai versus 36% in Copenhagen and 40% in Berlin. There is greater support still (55%) for increasing road user charges to aid cheaper and better connected public transport. Only one in five are against the idea of increasing road charges for this purpose.

Equally, almost four in five across the globe would support investment in public transport over driving. This is true even in cities where car is king, where very substantial support holds for investing in public transport over driving.

THE SCOPE FOR GREENER INTER-CITY TRAVEL

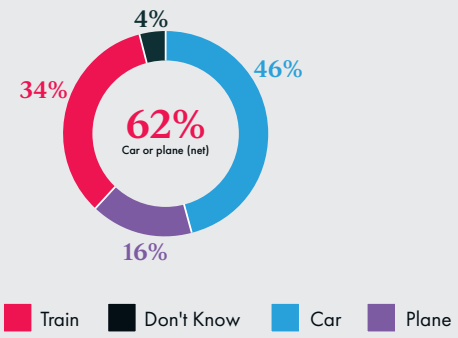
HOW DO PEOPLE TRAVEL BETWEEN CITIES?

Around the world, policymakers and operators are increasingly exploring how to encourage greener long-distance travel. To deliver this, it is important to understand what motivates passengers' transport decisions.

Across those surveyed, just short of two thirds chose the car or plane as their default mode of long-distance travel, while a third chose the train. This varies substantially by city and is a product of the availability of transport infrastructure in each region. For example, while train travel is the most popular mode in Italy (42%), the UK (45%) and France (45%), the car is over three times as popular in the USA (60% vs.17%).

DEFAULT CHOICE FOR LONG-DISTANCE TRAVEL:

All respondents (%)



WHAT DRIVES PEOPLE'S INTERCITY TRANSPORT DECISIONS?

For intercity travel, the 'three Cs' of cost, convenience and comfort continue to determine how people travel between cities. There is some variance between cities, for example residents of Warsaw or Sydney significantly value convenience over cost, whereas for passengers in London, Berlin and San Francisco, cost is the most important factor.

MOST IMPORTANT FACTORS IN LONG-DISTANCE TRAVEL CHOICES

All respondents (%)

COST

TOTAL	62%
LONDON	67%
BERLIN	63%
MILAN	59%
DUBAI	53%
WARSAW	56%
WASHINGTON	56%
SAN FRANCISCO	67%
TORONTO	66%
PARIS	64%
SINGAPORE	61%
SYDNEY	63%
COPENHAGEN	70%

CONVENIENCE

TOTAL	61%
LONDON	64%
BERLIN	62%
MILAN	60%
DUBAI	52%
WARSAW	70%
WASHINGTON	62%
SAN FRANCISCO	67%
TORONTO	65%
PARIS	51%
SINGAPORE	64%
SYDNEY	69%
COPENHAGEN	53%

COMFORT

TOTAL	61%
LONDON	62%
BERLIN	52%
MILAN	53%
DUBAI	71%
WARSAW	66%
WASHINGTON	70%
SAN FRANCISCO	62%
TORONTO	63%
PARIS	61%
SINGAPORE	64%
SYDNEY	66%
COPENHAGEN	45%

TIME TAKEN

TOTAL	56%
LONDON	55%
BERLIN	59%
MILAN	64%
DUBAI	56%
WARSAW	46%
WASHINGTON	49%
SAN FRANCISCO	63%
TORONTO	56%
PARIS	51%
SINGAPORE	63%
SYDNEY	58%
COPENHAGEN	57%

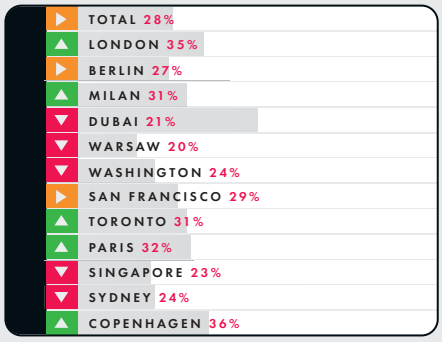
ENVIRONMENTAL IMPACT

TOTAL	14%
LONDON	13%
BERLIN	20%
MILAN	14%
DUBAI	23%
WARSAW	12%
WASHINGTON	13%
SAN FRANCISCO	15%
TORONTO	10%
PARIS	19%
SINGAPORE	12%
SYDNEY	9%
COPENHAGEN	14%

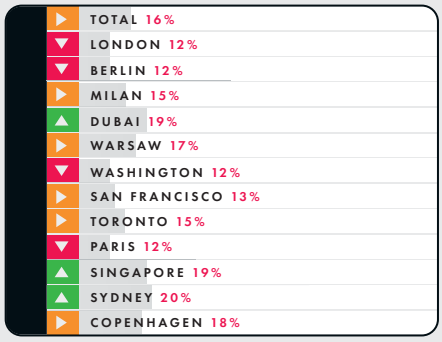
SINGLE MOST IMPORTANT DRIVER FOR CHOOSING TRAIN TRAVEL:

All respondents (%)

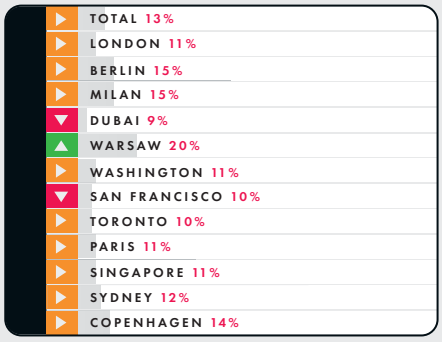
LOWER PRICE OF TRAIN TICKETS COMPARED TO CAR FUEL / PLANE TICKETS



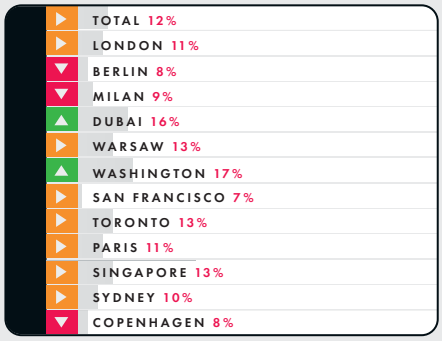
SHORTER JOURNEY TIME



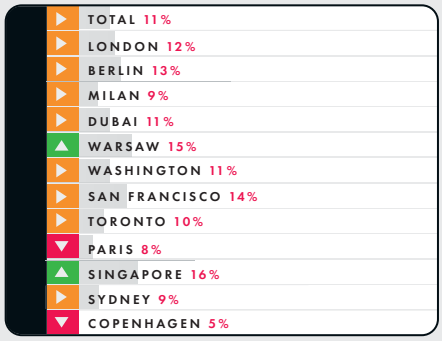
DIRECT SERVICES / NO NEED TO CHANGE TRAINS



GREATER COMFORT



LESS CROWDING



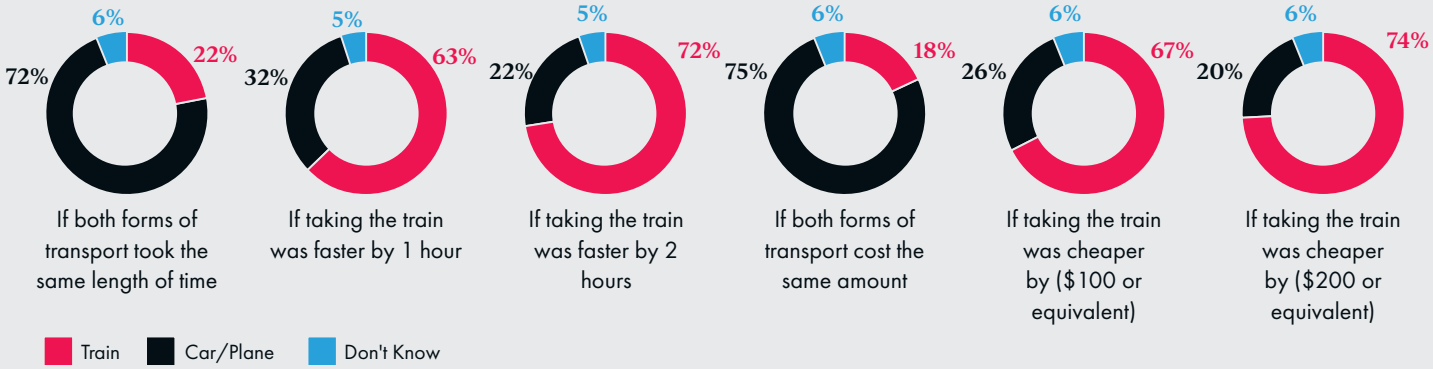
However, when we drill down further, when asked to consider the single most important driver for travelling by train over long distances, respondents are clear that price is the key determinant. Equally, when asked to identify the biggest barrier to long distance train travel, respondents again clearly selected cost (46% vs the next closest of 36% for journey time).

WHAT WOULD ENCOURAGE PEOPLE TO CHANGE HOW THEY TRAVEL?

Further examining the attitudes of those citizens who chose the car or plane as their default travel option, it is clear that both cheaper cost and faster journey times could transform the numbers of people that choose to travel by train.

DECISION-MAKING FACTORS:

Among those who would choose a plane or car by default (%)



CASE STUDY:
HOW HIGH SPEED RAIL TRANSFORMED TRAVEL IN ITALY AND BEYOND

In Italy, where Hitachi Rail delivered its first very high speed ETR 1000 over ten years ago, high speed rail has seen passenger growth of 517% - rising from 6.5m to 40m passenger journeys per year (Trenitalia, 2019). Fast, reliable services have altered fundamentally the ability of Italians to travel easily between major economic centres, for example 75% of Rome-Milan journeys are now by train, with passengers quadrupling in a decade. The success of this service has cut the number of journeys using higher polluting transport on these routes. Although only a year into service, Hitachi Rail's ETR 1000 has had a similar impact in Spain, where, operating under the IRYO brand, it has cut journey times and increased seats between Madrid and Barcelona by 42%.

While many high speed services started as domestic routes, in recent years focus has expanded to include cross-border journeys to connect European neighbours, like the one the ETR1000 provides between Paris and Milan. The service's impressive 75% increase in passenger numbers in the first two years of operation demonstrates the popularity and demand for this type of journey.

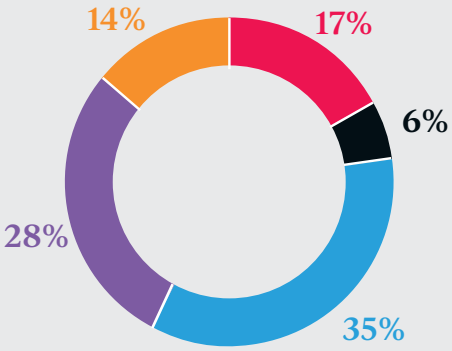
Travel and tourism currently account for around 10% of global emissions and, without intervention, is expected to grow by 5% annually, reaching 8.4 gigatons of $C0_2$ emissions by 2030. In this context, solutions such as high speed trains holds the potential to decarbonise popular travel routes across the Europe by replacing flights with efficient rail connections. In Japan, efficient, comfortable very high-speed trains such as the Shinkansen fleet for which Hitachi Rail is one of the manufacturers have already replaced domestic air travel.

HOW LIKELY ARE PEOPLE TO TRAVEL DIFFERENTLY IN THE FUTURE?

Our research shows that there is the appetite, and the expectation, for more train travel in the future. When respondents were asked to assess how their travel habits would change over the next five years, over one third (35%) answered that they expect to travel more by train. This, compared to only 17% expecting to drive more and 6% expecting to fly more, underlines a clear direction of travel for where future demand will lie. There is consequently an opportunity and a challenge for administrators around the world to deliver the infrastructure that can facilitate this demand. And in doing so, cities have the opportunity to deliver the green growth that our global net zero targets require.

FUTURE TRAVEL HABITS

All respondents (Net agree %) and Market splits (%)



I DO NOT THINK HOW I TRAVEL ON LONG DISTANCE JOURNEYS BETWEEN CITIES WILL CHANGE

TOTAL	28%
LONDON	25%
BERLIN	33%
MILAN	30%
DUBAI	14%
WARSAW	36%
WASHINGTON	25%
SAN FRANCISCO	33%
TORONTO	25%
PARIS	23%
SINGAPORE	20%
SYDNEY	29%
COPENHAGEN	42%

I WILL TRAVEL MORE BY TRAIN

TOTAL	35%
LONDON	38%
BERLIN	33%
MILAN	34%
DUBAI	50%
WARSAW	30%
WASHINGTON	19%
SAN FRANCISCO	20%
TORONTO	30%
PARIS	46%
SINGAPORE	45%
SYDNEY	30%
COPENHAGEN	28%

I WILL TRAVEL MORE BY CAR

TOTAL	17%
LONDON	18%
BERLIN	14%
MILAN	13%
DUBAI	18%
WARSAW	16%
WASHINGTON	26%
SAN FRANCISCO	22%
TORONTO	21%
PARIS	13%
SINGAPORE	14%
SYDNEY	21%
COPENHAGEN	15%

I WILL TRAVEL MORE BY PLANE

TOTAL	6%
LONDON	3%
BERLIN	6%
MILAN	6%
DUBAI	12%
WARSAW	5%
WASHINGTON	10%
SAN FRANCISCO	5%
TORONTO	5%
PARIS	4%
SINGAPORE	10%
SYDNEY	5%
COPENHAGEN	3%

More by car | More by plane | More by train | No change | Don't know

Significantly higher/lower compared to the total

CASE STUDY:
A GROWING EUROPEAN MOVEMENT TO LEGISLATE FOR GREENER TRAVEL

Europeans want greater connections across Europe. Yet, many of the modes of transport to achieve this – particularly air travel, which returned to pre-pandemic levels last year – undermine key decarbonisation goals. The EU has set targets of a 55% reduction in emissions by 2030 and climate neutrality by 2050. The success of these targets relies on greener transport.

There are signals that European governments understand the need to reduce the reliance of short haul flights, with France legislating to ban flights on any domestic journey that can be taken in less than 2.5 hours by train, and with the Spanish Government (at the time of writing) planning to introduce similar legislation this year. Other European countries including Austria and Germany have also recently introduced higher air taxes for domestic flights where rail alternatives exist.

Passengers have equally shown an increasing concern about their travel carbon footprint, with a recent survey by the European Investment Bank finding that 62% of Europeans support a ban on short haul flights. This type of study suggests that while, as our own research suggests, sustainability is not a primary driver of transport choice at an individual level, there is nonetheless support for changes at a policy and institutional level.

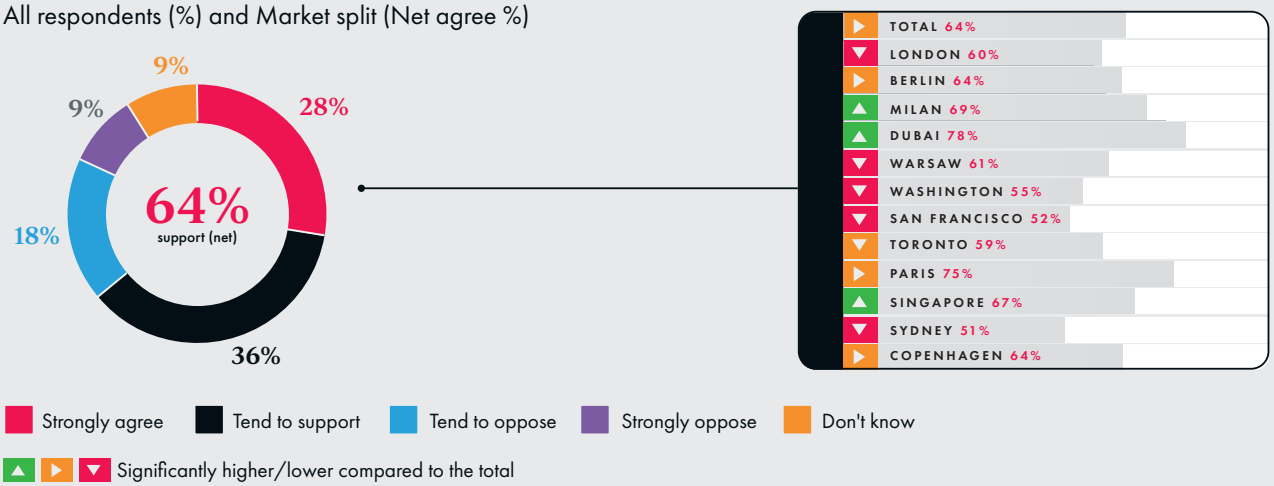
LEGISLATIVE SOLUTIONS?

How should policymakers look at supporting public demand for more intercity train travel in the future through bolder or more creative solutions? One area that the research looked at was around legislation to ban short-haul flights where good high -speed alternatives exist. This is in line with policy that was introduced in France in 2023, and so has a practical example of how it could work.

The policy secured significant support from respondents (64% in favour and only 27% against), with a majority supporting the idea across all markets. There were notably high levels of support in Dubai (75%), Paris (75%) and Milan (69%), the latter two perhaps reflecting the good access to high speed rail (as well as support for the similar policy already introduced in France).

SUPPORT FOR THE BANNING OF SHORT HAUL FLIGHTS BETWEEN CITIES WHERE THERE IS ALSO A HIGH SPEED RAIL LINK:

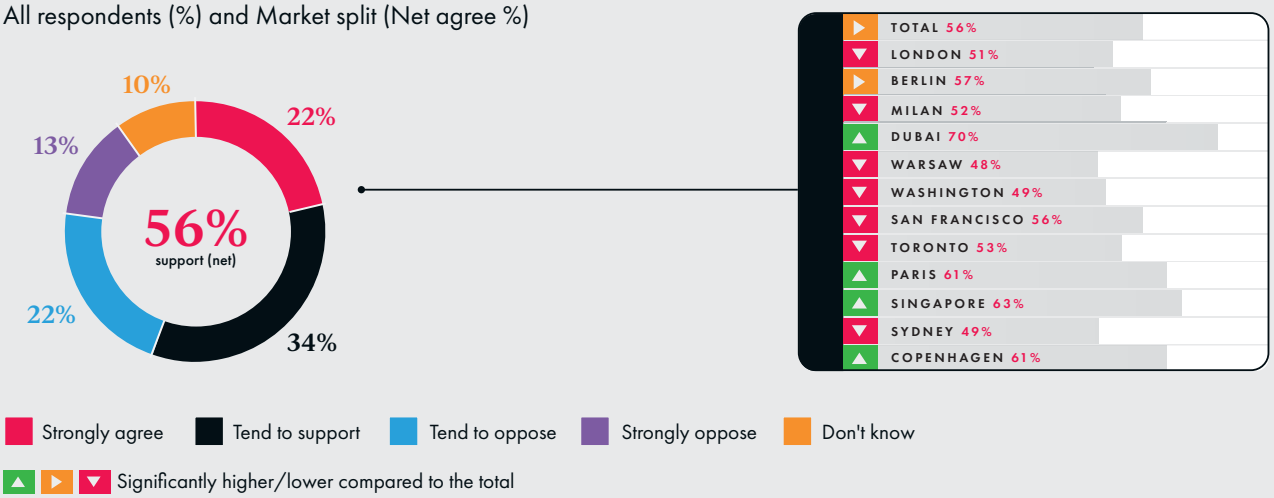
All respondents (%) and Market split (Net agree %)



The study also explored whether people would be willing to pay higher air taxes to fund better rail infrastructure. Again, there was strong overall support (56%), with majorities in favour in all but Washington D.C., Warsaw and Sydney, who fell just short of a majority (49%, 48% and 49%).

SUPPORT FOR "AN INCREASE IN AIR TAXES TO FUND BETTER CONNECTED AND CHEAPER RAIL TRAVEL"

All respondents (%) and Market split (Net agree %)



CONCLUSION

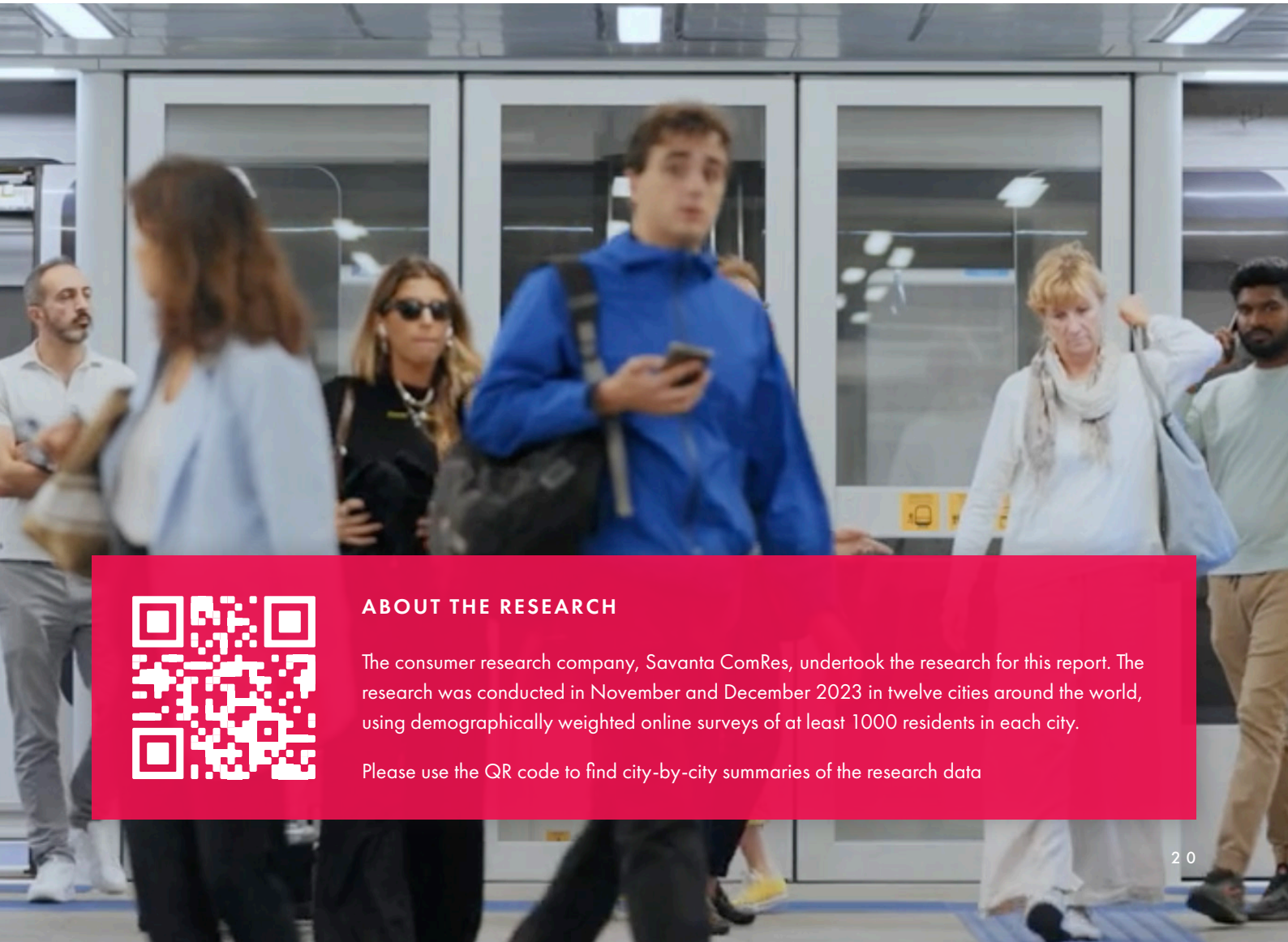
Our study examines how people choose to travel within and between cities around the world.

By surveying people about their current and expected future travel habits we cast a light on how operators, policymakers and the transport industry can work to enhance the appeal of public transport, and help cut the usage of more polluting travel by car and plane.

The research is clear, in places where the car rules the road through to cities where public transport is overwhelmingly the choice for commuters, convenience is king. Convenience – in terms of access to, frequency of service, and speed of journey – is the decisive factor for passengers when choosing their mode of transport in cities. Cost is also crucial, but its importance varies more from city to city reflecting the demands of local economies. Conversely, when it comes to barriers to using public transport, respondents cite crowding as the single most significant issue, although cost and safety play a significant role in some markets.

Our study also points the way for operators and policymakers considering how to encourage a greater role for rail travel between cities. For those who currently travel by car or plane as a default option, a significant majority of respondents around the world would choose to switch to rail if it were either cheaper or faster, with cost identified as the single most important factor. There is also support for cities to invest in the necessary infrastructure to deliver high speed rail, with respondents backing increased air taxes to fund it. And policymakers could also expect significant support for policies that look to legislate against short-haul flights where good alternative high speed rail exists.

The opportunities are clear; and now our challenge as an industry is to work together to deliver them.



ABOUT THE RESEARCH

The consumer research company, Savanta ComRes, undertook the research for this report. The research was conducted in November and December 2023 in twelve cities around the world, using demographically weighted online surveys of at least 1000 residents in each city.

Please use the QR code to find city-by-city summaries of the research data

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