**Flash Eurobarometer 382a**

# EUROPEANS' SATISFACTION WITH RAIL SERVICES

## SUMMARY

Fieldwork: September 2013

Publication: December 2013

This survey has been requested by the European Commission, Directorate-General Mobility and Transport and co-ordinated by Directorate-General for Communication.



**Flash Eurobarometer 382a - TNS Political & Social**

**Flash Eurobarometer 382a**

# Europeans' satisfaction with rail services

Conducted by TNS Political & Social at the request of
the European Commission,
Directorate-General Mobility and Transport

Survey co-ordinated by the European Commission,
Directorate-General for Communication
(DG COMM "Strategy, Corporate Communication Actions and
Eurobarometer" Unit)

Eurobarometer

# TABLE OF CONTENTS

## INTRODUCTION

The flash Eurobarometer survey on "Rail and urban transport passenger satisfaction" (Flash 382a), is conducted to analyse EU citizens satisfaction with rail services through a number of features of rail transport in their country. This survey is a follow up survey to the Flash Eurobarometer 326 report carried out in March 2011 among respondents who had travelled by train within their country.

However, this summary has a slightly different target and extended objectives compared with the previous report. This Flash survey targets the general European public aged 15+.

It is important to note that the report does not discuss respondents' views of within country rail services in Cyprus and Malta, as there are no trains in those countries.

The three main objectives of the survey are to:

- Measure satisfaction with rail services;

- Understand accessibility issues when using rail services and measure satisfaction with rail services (particularly among those with accessibility issues); and

As satisfaction questions were asked to all respondents – even those not using trains – the results of the rail satisfaction questions received high level of "not applicable" or "don't know" answers in many cases. Therefore, it is important to look at difference between satisfaction and dissatisfaction to draw conclusion on the results of the satisfaction questions. Consequently, in this report, it is many times refer a difference between satisfaction and dissatisfaction.

In addition, this wave differentiates users of international, national and regional trains from users of suburban trains.

This survey was carried out by TNS Political & Social network in the 28 Member States of the European Union between 9h and 11th September 2013. 28,036 respondents aged 15 years old or more from different social and demographic groups were interviewed via telephone (landline and mobile phone) in their mother tongue on behalf of the Directorate-General for Mobility and Transports. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Strategy, Corporate Communication Actions and Eurobarometer" Unit)[1]. A technical note on the manner in which interviews were conducted by the Institutes within the TNS Political & Social network is appended as an annex to this report. Also included are the interview methods and confidence intervals[2].

Note: In this summary, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

| ABBREVIATIONS | | | |
|---|---|---|---|
| BE | Belgium | LV | Latvia |
| BG | Bulgaria | LU | Luxembourg |
| CZ | Czech Republic | HU | Hungary |
| DK | Denmark | NL | The Netherlands |
| DE | Germany | AT | Austria |
| EE | Estonia | PL | Poland |
| EL | Greece | PT | Portugal |
| ES | Spain | RO | Romania |
| FR | France | SI | Slovenia |
| IE | Ireland | SK | Slovakia |
| IT | Italy | FI | Finland |
| LT | Lithuania | SE | Sweden |
| HR | Croatia | UK | The United Kingdom |
| EU | Weighted average of the 26 Member States of the European Union surveyed | EU28 | European Union – 28 Member States |

In this report, EU refers to the weighted average of the 26 Member States (except Malta and Cyprus where there are no railway services).

* * * * *

*The Eurobarometer web site can be consulted at the following address:*
*http://ec.europa.eu/public_opinion/index_en.htm*

*We would like to take the opportunity to thank all the respondents across the continent who gave their time to take part in this survey.*
*Without their active participation, this study would not have been possible.*

[1] http://ec.europa.eu/public_opinion/index_en.htm

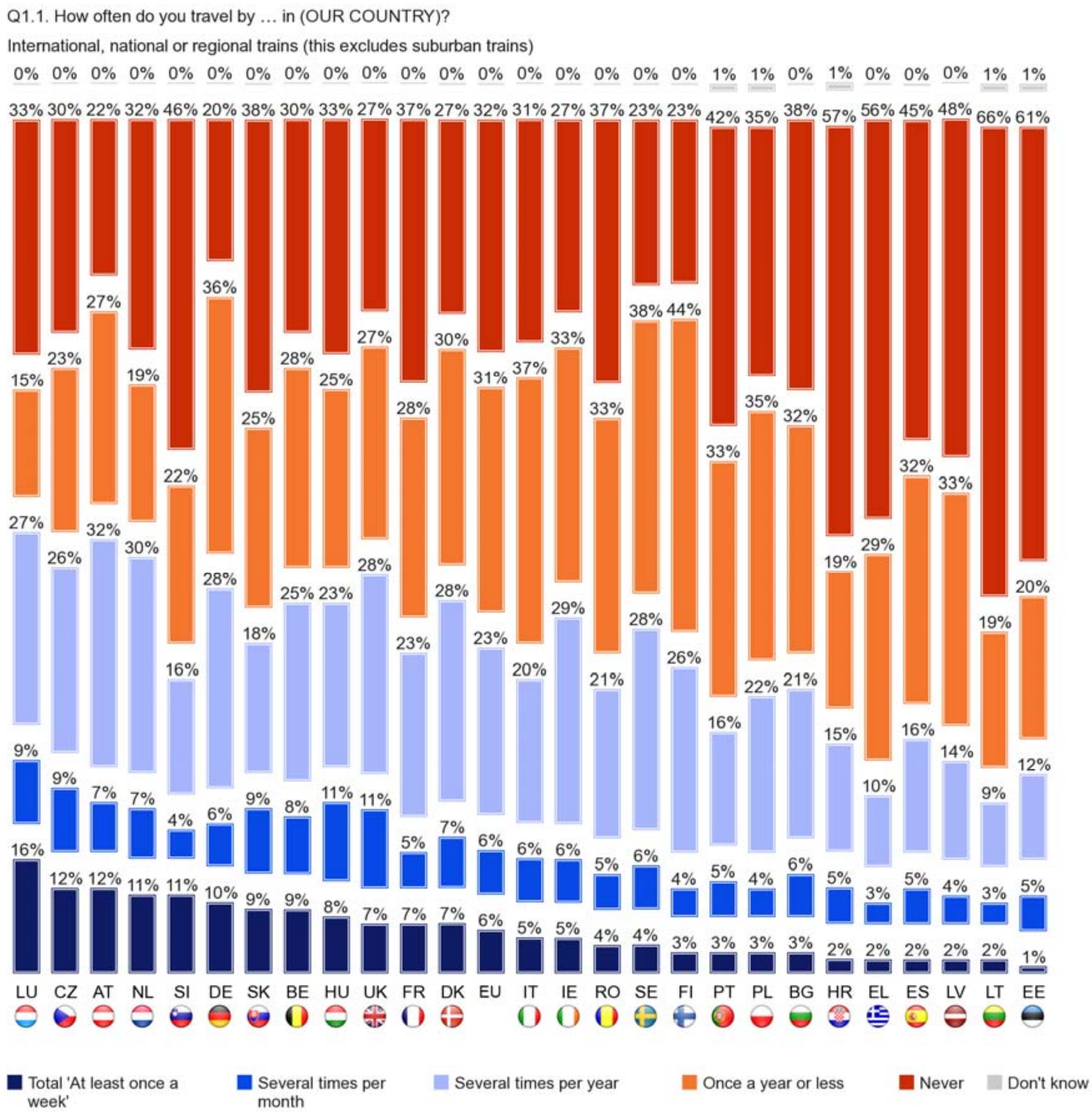
[2] The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

# CHAPTER 1: RAIL PASSENGER SATISFACTION

## I. CURRENT USE OF TRAINS IN THE EU

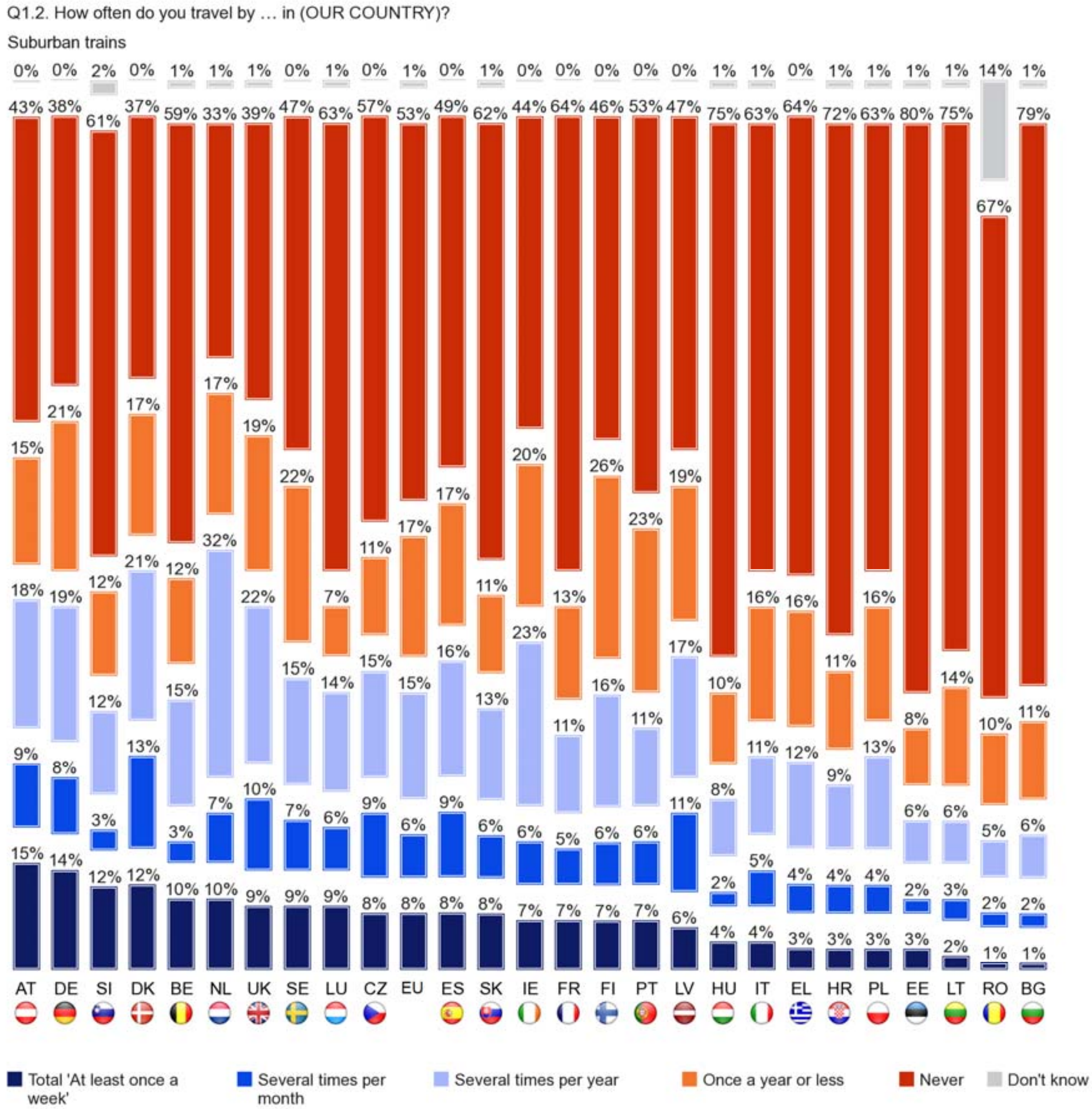
**Approximately two-thirds of Europeans have travelled by international, national or regional trains at least once in their lives (67%). Conversely, one-third of Europeans (32%) has never used those trains, although 83% of Europeans live within 30 minutes of a station.**

Respondents are most likely to have used these services as least once in Germany (80%), Austria (78%), Finland (77%) and Sweden (77%) and are least likely to have used these services at least once in Croatia (42%), Estonia (39%) and Lithuania (33%).




Base: all respondents except MT and CY (n= 26034)

**Suburban rail** use is polarized, with a group of heavy users (14%) and a large group not using these trains at all (53%), while 31% of Europeans live at less than 10 minutes from a station.

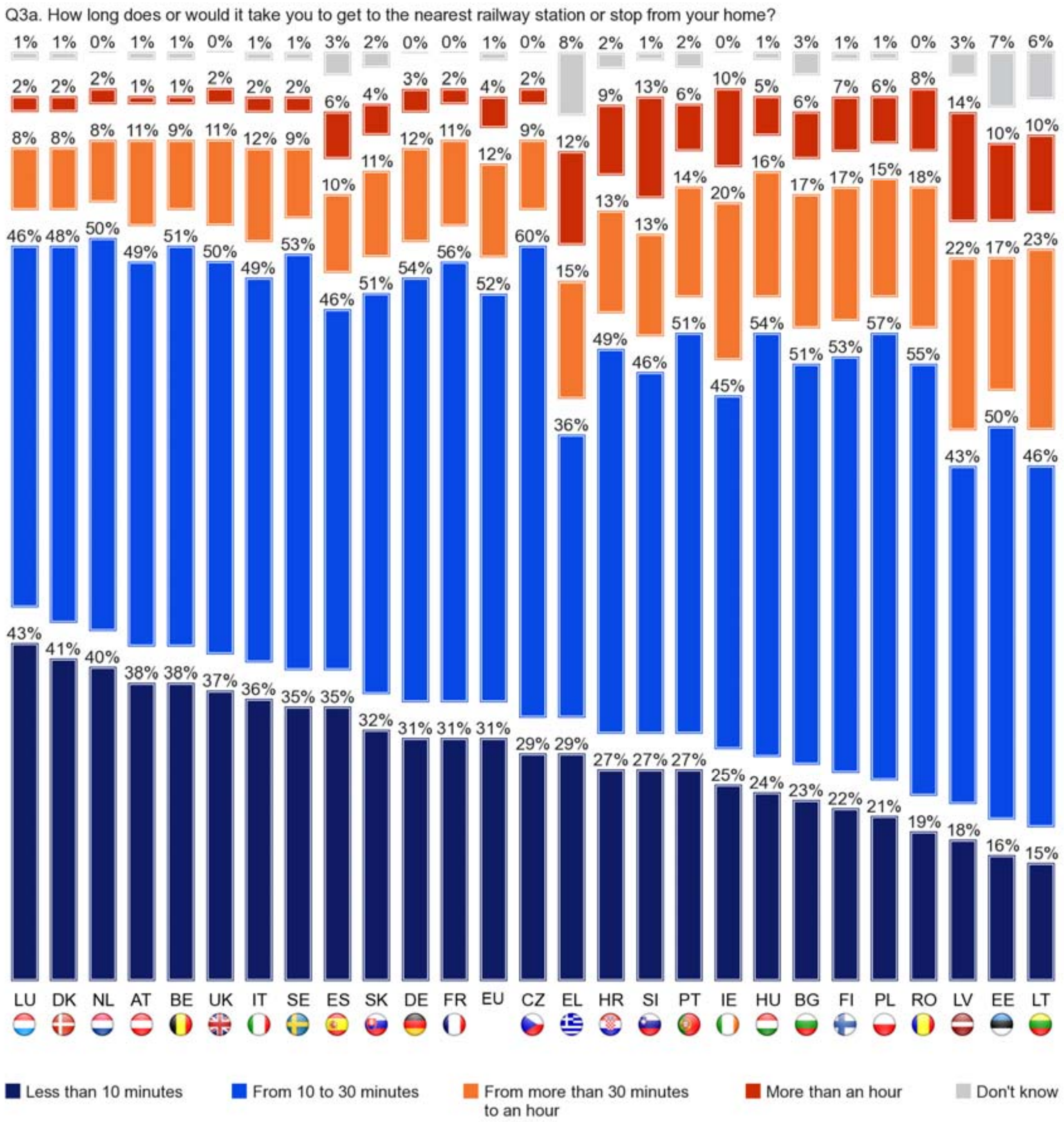



Base: all respondents except MT and CY (n= 26034)

Respondents are most likely to have used these suburban trains at least once in the Netherlands (66%), Denmark (63%) and Germany (61%). Respondents were least likely to use these trains in Bulgaria (20%), Estonia (19%) and Romania (19%).

The proportion of respondents who have never used suburban trains has decreased by six percentage points compared with the previous survey in 2012 (53% versus 59%).

Europeans generally have good access to train stations. In total, more than eight out of ten Europeans live within 30 minutes of a train station (83%).




Base: all respondents except MT and CY (n= 26034)

Respondents in rural areas are less likely to live within 10 minutes of a train station (24%) compared with those in large towns and mid-sized towns (both 34%).

The most frequent reason why Europeans use trains is for leisure activities: with 22% for holiday activities and 33% for other leisure activities.

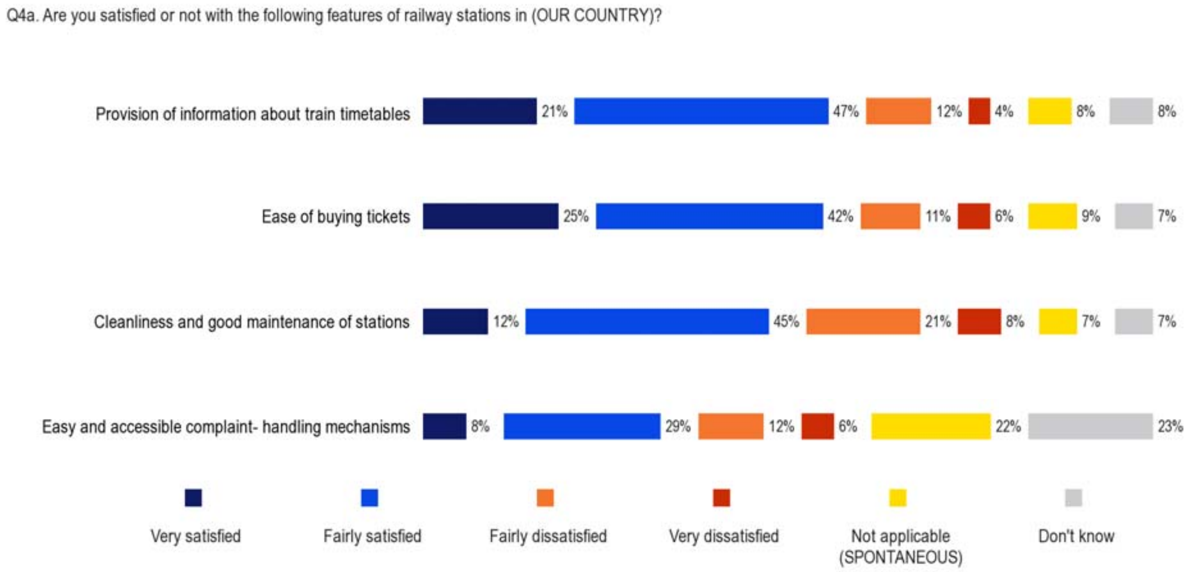
## II. SATISFACTION WITH RAILWAY STATIONS

**On average, 55% of respondents are satisfied with the services in railway stations that were asked about in this survey.**

Respondents are most positive about the provision of information about train timetables (68% satisfied vs. 16% dissatisfied, +52)[3] and the ease of buying tickets (67% satisfied vs. 17% dissatisfied, +50).

More respondents are satisfied than dissatisfied about provision of information about train timetables and the ease of buying tickets in every Member State.

Respondents are somewhat less positive about the cleanliness and good maintenance of stations (57% satisfied vs. 29% dissatisfied, +28) and easy and accessible complaint-handling mechanisms (37% satisfied vs. 18% dissatisfied, +19).

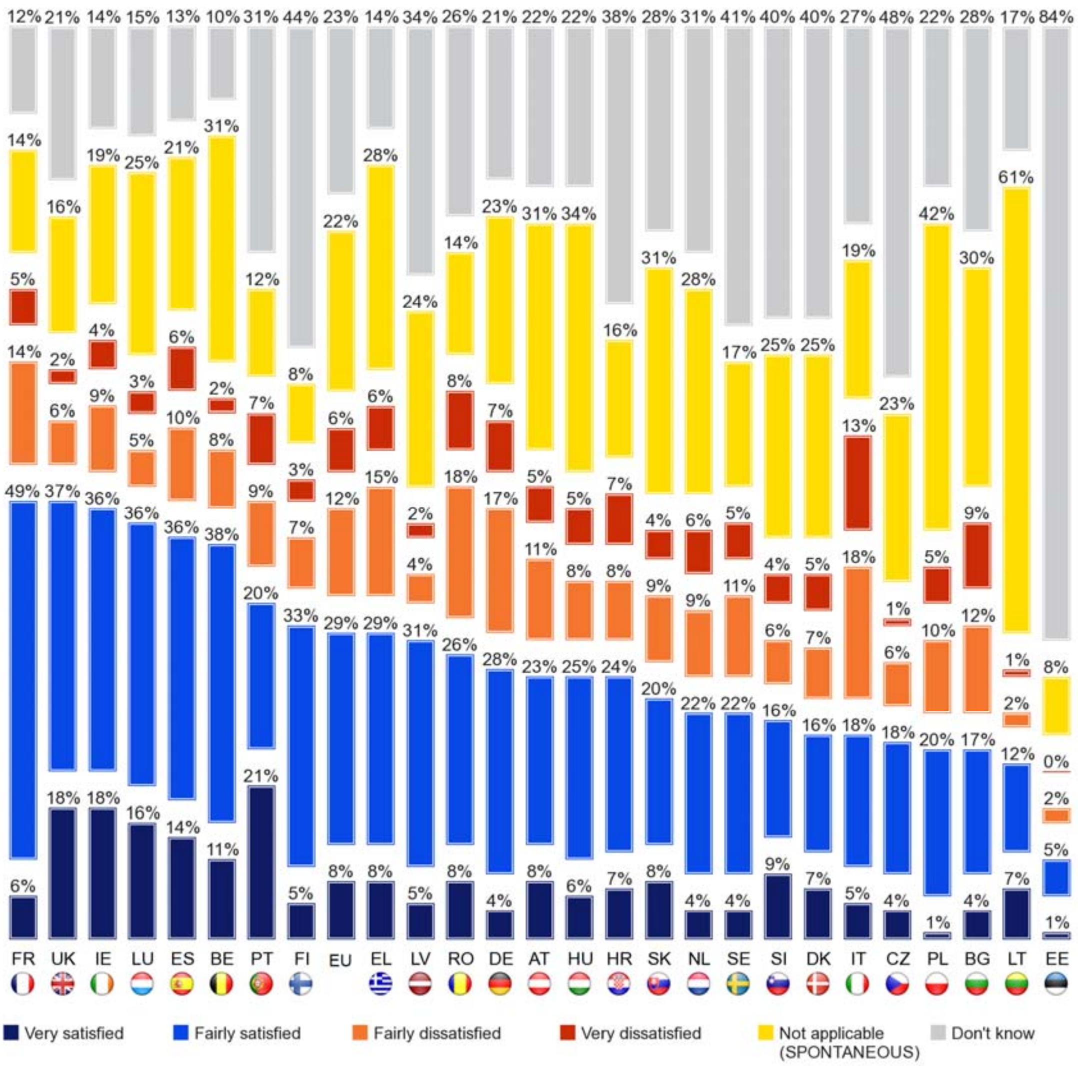



[3] As explained in the introduction of the report, those figures are the difference between satisfaction and dissatisfaction.

Satisfaction with complaint handling has increased by an impressive 10 percentage points since 2011. In 4 Member States (France, Latvia, Finland and Spain), satisfaction has even improved by more than 20 percentage points. Italy is the only country where more respondents are dissatisfied than satisfied with complaint-handling mechanisms (31% vs. 23%).

Q4a.3. Are you satisfied or not with the following features of railway stations in (OUR COUNTRY)?

Easy and accessible complaint- handling mechanisms



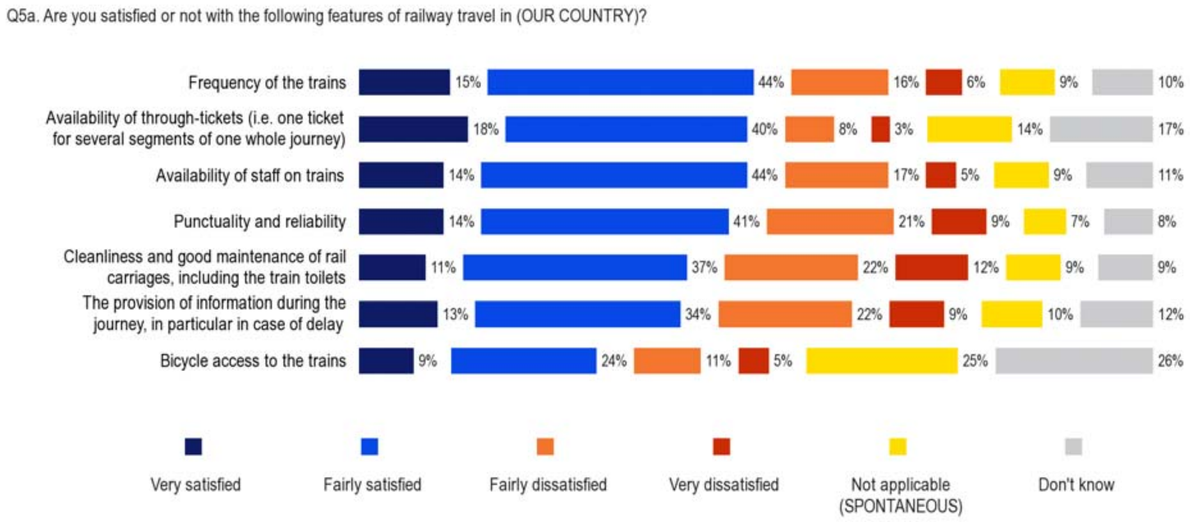

Base: all respondents except MT and CY (n= 26034)

Satisfaction with remaining aspects has remained relatively stable since the previous survey in 2011.

## III. SATISFACTION WITH RAILWAY TRAVEL

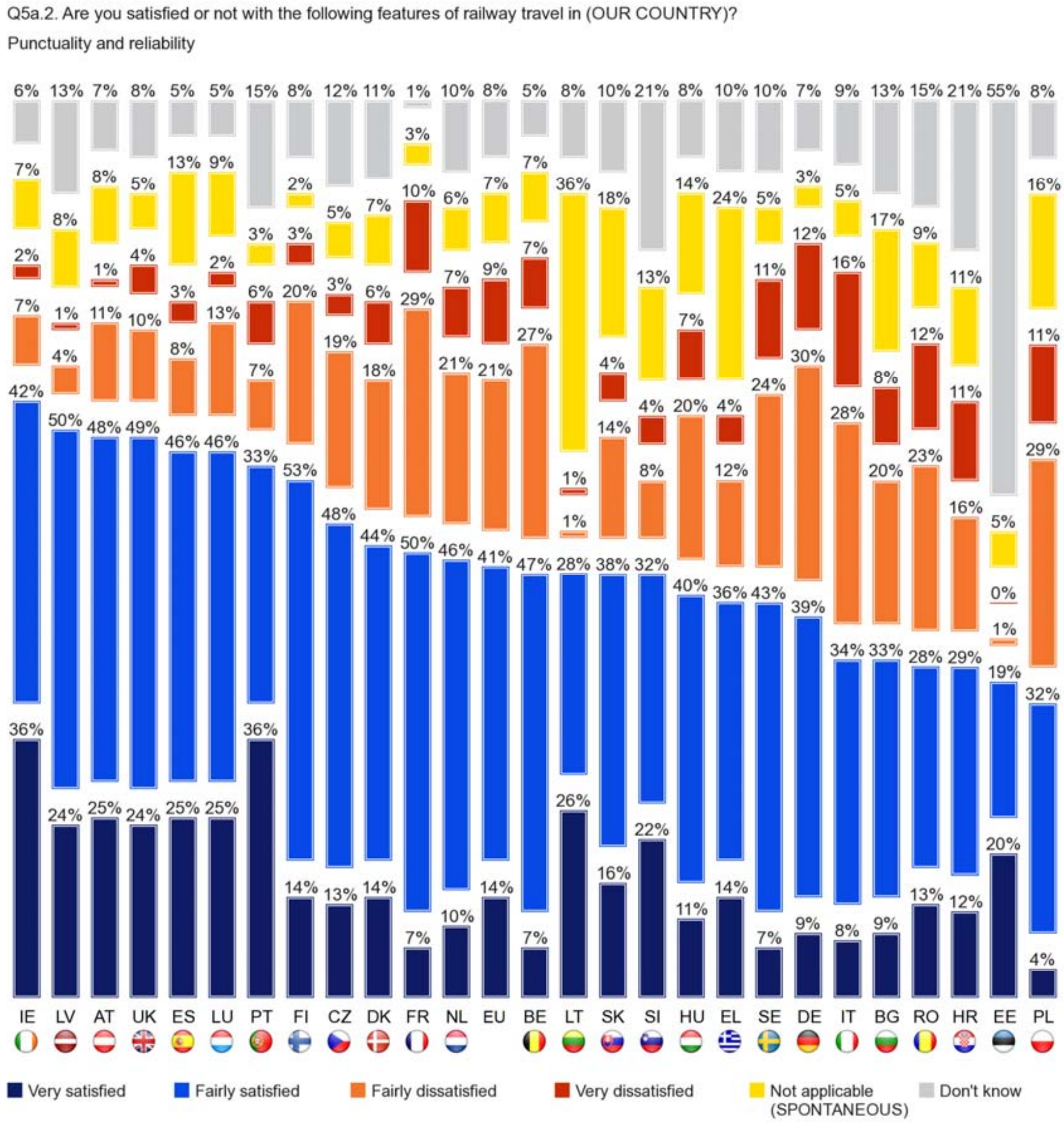
**On average, 51% of respondents are satisfied with each aspect of railway travel surveyed.**

Respondents are particularly positive about the frequency of the trains (59% satisfied vs. 22% dissatisfied, +37), availability of through tickets (58% satisfied vs. 11% dissatisfied, +47), availability of staff on trains (58% satisfied vs. 22% dissatisfied, +36) and punctuality and reliability (55% satisfied vs. 30% dissatisfied, +25).




Europeans are considerably less positive in their assessment of the provision of information during the journey particularly in case of delay (47% satisfied against 31% dissatisfied, +16), bicycle access to the trains (33% satisfied against 16% dissatisfied,+17) and cleanliness and maintenance of rail carriages including the train toilets (48% satisfied against 34% dissatisfied,+14).

The only Member States where more respondents are dissatisfied with the punctuality and reliability of trains are Italy (44% vs. 42%) and Poland (40% vs. 36%).




Base: all respondents except MT and CY (n= 26034)

Dissatisfaction with the cleanliness of carriages also varies widely across Member States. More than half of those surveyed in Italy (59%), Romania (53%) and Bulgaria (52%) say that that they are dissatisfied with the cleanliness of rail carriages.

Several countries show consistently high levels of satisfaction with multiple aspects of trains. The United Kingdom is ranked within the top three for eight and Finland for six out of the eleven aspects of the train journey experience.

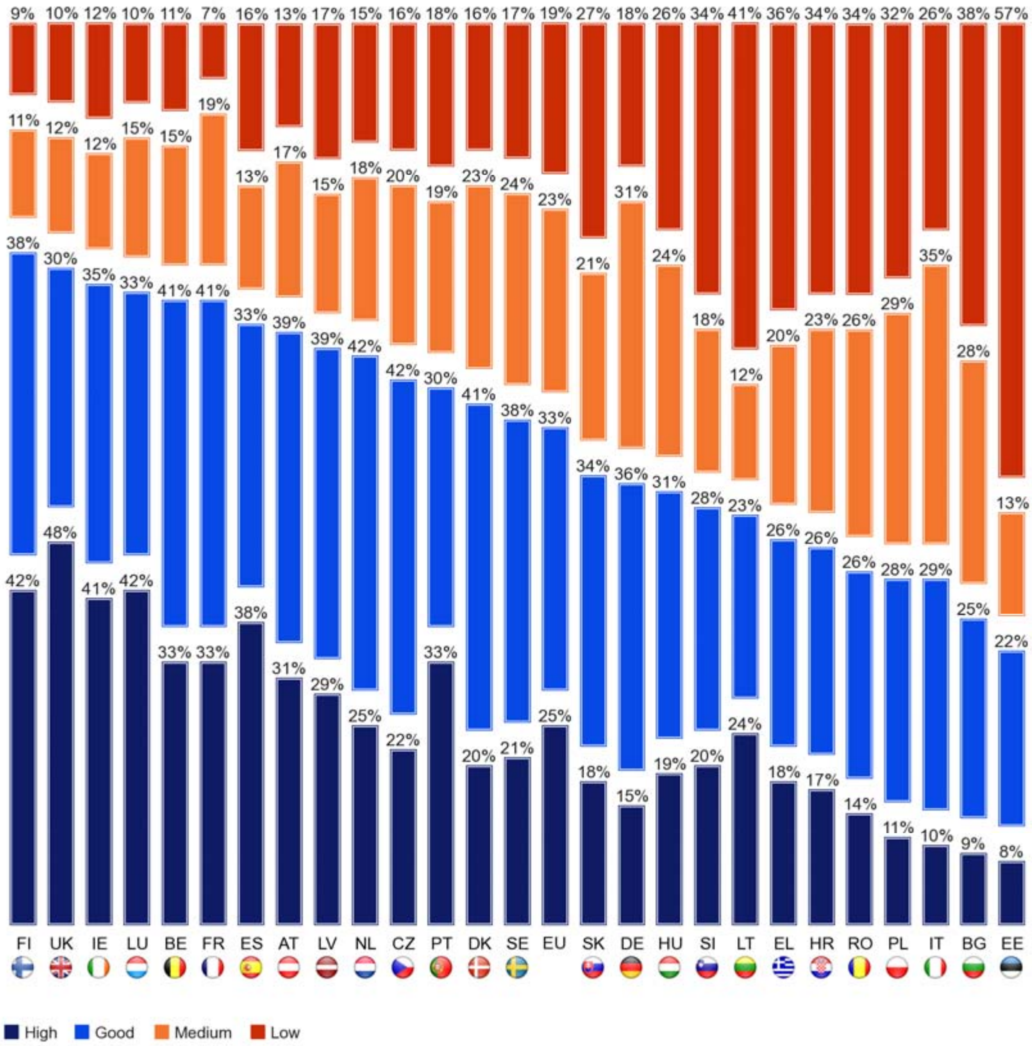
## IV. Satisfaction index of railway stations and travels

An aggregate index was created, in order to evaluate satisfaction of Europeans with both the various aspects of railway stations and with the various aspects of railway travel in their country. This index ranks Europeans into four categories – high, good, medium and low - based on how satisfied they are overall with the eleven elements evaluated.

Overall, one quarter of respondents have a "high" satisfaction index (25%). One third of respondents rank as "good" (33%), Less than one quarter of respondents rank as medium (23%) or low (19%) on this scale.

This overall satisfaction index is higher in the following eight countries: Finland (80%), the United Kingdom (78%), Ireland (76%), Luxembourg (75%), Belgium (74%), France (74%), Spain (71%) and Austria (70%), where at least seven in ten respondents rank as either "high" or "good". However, respondents in Estonia (30%), Bulgaria (34%), Poland and Italy (39% for both) ranked lowest on this satisfaction index. As mentioned before, it is important to keep in mind that a large proportion of respondents in Estonia did not know if they were satisfied or unsatisfied, which affects the satisfaction index.

I.. Satisfaction index of railway stations and travels



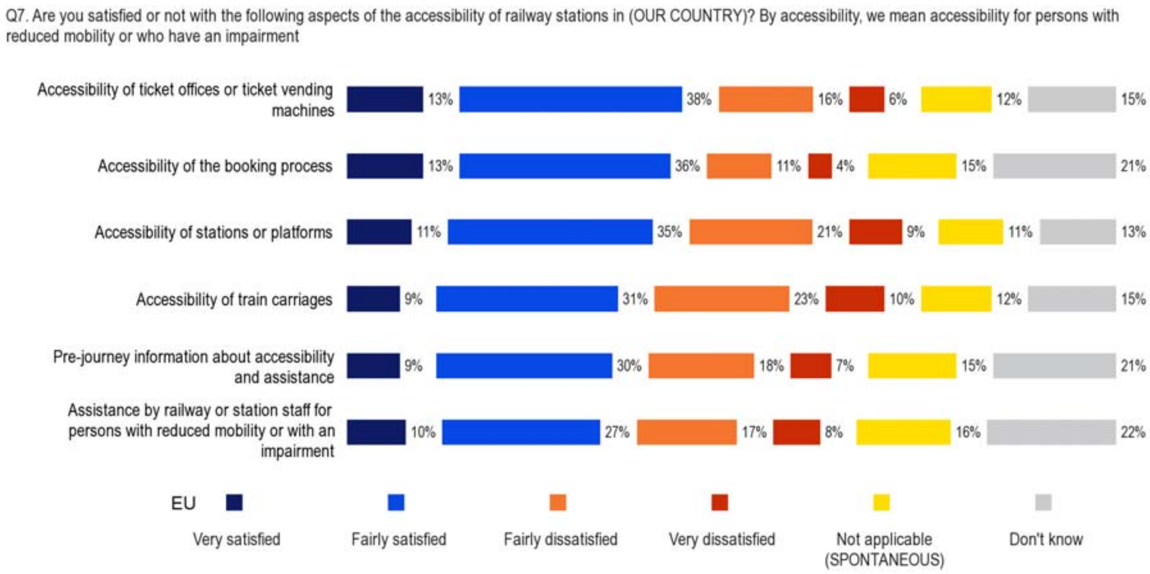
## CHAPTER 2: ACCESSIBILITY OF RAILWAY STATIONS

Across the EU, a third of respondents who never use trains cited at least one accessibility problem as a reason for why they do not use trains. This implies that overall some 19% of Europeans do not use the train for accessibility issues.


Base: those who take the train once a year or less or never (n=15219)

Respondents who do not use rail transport are most likely to cite at least one accessibility reason for not using railway transportation in Ireland (52%), Belgium (43%) and Germany (42%).

Overall, respondents are most satisfied with the accessibility of ticket offices or ticket vending machines (51%) and slightly less than half of Europeans are satisfied with the accessibility of the booking process (49%) or the accessibility of stations or platforms (46%).

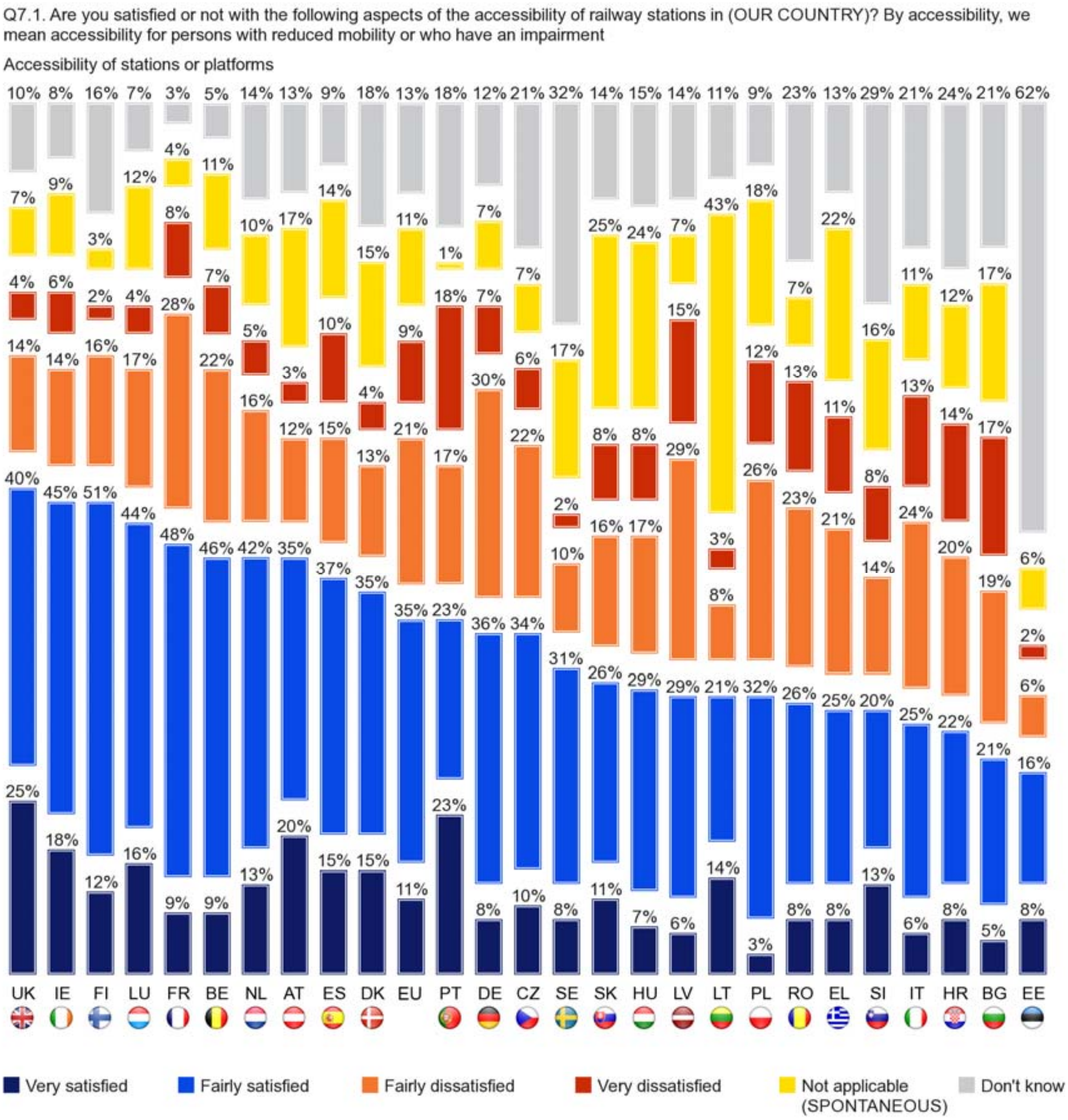


Only four in ten respondents (40%) are satisfied with the accessibility of train carriages in their country and slightly fewer are satisfied with the pre-journey information about accessibility and assistance (39%) or the available assistance by railway or station staff for persons with reduced mobility (37%).

Respondents with accessibility problems are considerably more likely to be dissatisfied with each of these services than respondents who do not report accessibility issues.

A relative of majority of respondents with accessibility issues are dissatisfied with the accessibility of train carriages (37% vs. 42%; -5).

The two countries that have the consistently highest satisfaction with accessibility are the United Kingdom and Ireland. For instance, respondents in these countries are particularly satisfied with the accessibility of stations (65% and 63%), carriages (63% and 57%) and ticket offices (71% and 66%).




Base: all respondents except MT and CY (n= 26034)

# ANNEXES

# TECHNICAL SPECIFICATIONS

# FLASH EUROBAROMETER 382a
"Europeans' satisfaction with rail services"
## TECHNICAL SPECIFICATIONS

Between the 9th and the 11th of September 2013, TNS Political & Social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the survey FLASH EUROBAROMETER 382a about "Europeans' satisfaction with rail services".

This survey has been requested by the EUROPEAN COMMISSION, Directorate-General for Mobility and Transport. It is a general public survey co-ordinated by the Directorate-General for Communication ("Strategy, Corporate Communication Actions and Eurobarometer" Unit). The FLASH EUROBAROMETER 382a covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over. The survey covers the national population of citizens as well as the population of citizens of all the European Union Member States that are residents in these countries and have a sufficient command of the national languages to answer the questionnaire. All interviews were carried using the TNS e-Call center (our centralized CATI system). In every country respondents were called both on fixed lines and mobile phones. The basic sample design applied in all states is multi-stage random (probability). In each household, the respondent was drawn at random following the "last birthday rule".

TNS has developed its own RDD sample generation capabilities based on using contact telephone numbers from responders to random probability or random location face to face surveys, such as Eurobarometer, as seed numbers. The approach works because the seed number identifies a working block of telephone numbers and reduces the volume of numbers generated that will be ineffective. The seed numbers are stratified by NUTS2 region and urbanisation to approximate a geographically representative sample. From each seed number the required sample of numbers are generated by randomly replacing the last two digits. The sample is then screened against business databases in order to exclude as many of these numbers as possible before going into field. This approach is consistent across all countries.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

**Statistical Margins due to the sampling process**
**(at the 95% level of confidence)**

*various sample sizes are in rows* *various observed results are in columns*

| | 5% 95% | 10% 90% | 15% 85% | 20% 80% | 25% 75% | 30% 70% | 35% 65% | 40% 60% | 45% 55% | 50% 50% | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| N=50 | 6,0 | 8,3 | 9,9 | 11,1 | 12,0 | 12,7 | 13,2 | 13,6 | 13,8 | 13,9 | N=50 |
| N=500 | 1,9 | 2,6 | 3,1 | 3,5 | 3,8 | 4,0 | 4,2 | 4,3 | 4,4 | 4,4 | N=500 |
| N=1000 | 1,4 | 1,9 | 2,2 | 2,5 | 2,7 | 2,8 | 3,0 | 3,0 | 3,1 | 3,1 | N=1000 |
| N=1500 | 1,1 | 1,5 | 1,8 | 2,0 | 2,2 | 2,3 | 2,4 | 2,5 | 2,5 | 2,5 | N=1500 |
| N=2000 | 1,0 | 1,3 | 1,6 | 1,8 | 1,9 | 2,0 | 2,1 | 2,1 | 2,2 | 2,2 | N=2000 |
| N=3000 | 0,8 | 1,1 | 1,3 | 1,4 | 1,5 | 1,6 | 1,7 | 1,8 | 1,8 | 1,8 | N=3000 |
| N=4000 | 0,7 | 0,9 | 1,1 | 1,2 | 1,3 | 1,4 | 1,5 | 1,5 | 1,5 | 1,5 | N=4000 |
| N=5000 | 0,6 | 0,8 | 1,0 | 1,1 | 1,2 | 1,3 | 1,3 | 1,4 | 1,4 | 1,4 | N=5000 |
| N=6000 | 0,6 | 0,8 | 0,9 | 1,0 | 1,1 | 1,2 | 1,2 | 1,2 | 1,3 | 1,3 | N=6000 |
| N=7000 | 0,5 | 0,7 | 0,8 | 0,9 | 1,0 | 1,1 | 1,1 | 1,1 | 1,2 | 1,2 | N=7000 |
| N=7500 | 0,5 | 0,7 | 0,8 | 0,9 | 1,0 | 1,0 | 1,1 | 1,1 | 1,1 | 1,1 | N=7500 |
| N=8000 | 0,5 | 0,7 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,1 | 1,1 | 1,1 | N=8000 |
| N=9000 | 0,5 | 0,6 | 0,7 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,0 | 1,0 | N=9000 |
| N=10000 | 0,4 | 0,6 | 0,7 | 0,8 | 0,8 | 0,9 | 0,9 | 1,0 | 1,0 | 1,0 | N=10000 |
| N=11000 | 0,4 | 0,6 | 0,7 | 0,7 | 0,8 | 0,9 | 0,9 | 0,9 | 0,9 | 0,9 | N=11000 |
| N=12000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,8 | 0,8 | 0,9 | 0,9 | 0,9 | 0,9 | N=12000 |
| N=13000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,9 | 0,9 | N=13000 |
| N=14000 | 0,4 | 0,5 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,8 | 0,8 | N=14000 |
| N=15000 | 0,3 | 0,5 | 0,6 | 0,6 | 0,7 | 0,7 | 0,8 | 0,8 | 0,8 | 0,8 | N=15000 |
| | 5% 95% | 10% 90% | 15% 85% | 20% 80% | 25% 75% | 30% 70% | 35% 65% | 40% 60% | 45% 55% | 50% 50% | |

| ABBR. | COUNTRIES | INSTITUTES | N° INTERVIEWS | FIELDWORK DATES | | POPULATION 15+ |
|---|---|---|---|---|---|---|
| BE | Belgium | TNS Dimarso | 1.004 | 09/09/2013 | 11/09/2013 | 8.939.546 |
| BG | Bulgaria | TNS BBSS | 1.002 | 09/09/2013 | 11/09/2013 | 6.537.510 |
| CZ | Czech Rep. | TNS Aisa s.r.o | 1.007 | 09/09/2013 | 11/09/2013 | 9.012.443 |
| DK | Denmark | TNS Gallup A/S | 1.000 | 09/09/2013 | 11/09/2013 | 4.561.264 |
| DE | Germany | TNS Infratest | 1.000 | 09/09/2013 | 11/09/2013 | 64.336.389 |
| EE | Estonia | TNS Emor | 1.000 | 09/09/2013 | 11/09/2013 | 945.733 |
| EL | Greece | TNS ICAP | 1.002 | 09/09/2013 | 11/09/2013 | 8.693.566 |
| ES | Spain | TNS Demoscopia S.A | 1.000 | 09/09/2013 | 11/09/2013 | 39.127.930 |
| FR | France | TNS Sofres | 1.008 | 09/09/2013 | 11/09/2013 | 47.756.439 |
| IE | Ireland | IMS Millward Brown | 980 | 09/09/2013 | 11/09/2013 | 3.522.000 |
| IT | Italy | TNS ITALIA | 1.000 | 09/09/2013 | 11/09/2013 | 51.862.391 |
| CY | Rep. of Cyprus | CYMAR | 1.001 | 09/09/2013 | 11/09/2013 | 660.400 |
| LV | Latvia | TNS Latvia | 1.006 | 09/09/2013 | 11/09/2013 | 1.447.866 |
| LT | Lithuania | TNS LT | 1.000 | 09/09/2013 | 11/09/2013 | 2.829.740 |
| LU | Luxembourg | TNS Dimarso | 1.001 | 09/09/2013 | 11/09/2013 | 434.878 |
| HU | Hungary | TNS Hoffmann Kft | 1.004 | 09/09/2013 | 11/09/2013 | 8.320.614 |
| MT | Malta | MISCO International Ltd | 1.001 | 09/09/2013 | 11/09/2013 | 335.476 |
| NL | Netherlands | TNS NIPO | 1.000 | 09/09/2013 | 11/09/2013 | 13.371.980 |
| AT | Austria | TNS Austria | 1.002 | 09/09/2013 | 11/09/2013 | 7.009.827 |
| PL | Poland | TNS OBOP | 1.000 | 09/09/2013 | 11/09/2013 | 32.413.735 |
| PT | Portugal | TNS EUROTESTE | 1.001 | 09/09/2013 | 11/09/2013 | 8.080.915 |
| RO | Romania | TNS CSOP | 1.013 | 09/09/2013 | 11/09/2013 | 18.246.731 |
| SI | Slovenia | RM PLUS | 1.001 | 09/09/2013 | 11/09/2013 | 1.759.701 |
| SK | Slovakia | TNS AISA Slovakia | 1.000 | 09/09/2013 | 11/09/2013 | 4.549.956 |
| FI | Finland | TNS Gallup Oy | 1.002 | 09/09/2013 | 11/09/2013 | 4.440.004 |
| SE | Sweden | TNS SIFO | 1.000 | 09/09/2013 | 11/09/2013 | 7.791.240 |
| UK | United Kingdom | TNS UK | 1.000 | 09/09/2013 | 11/09/2013 | 51.848.010 |
| HR | Croatia | Puls | 1.001 | 09/09/2013 | 11/09/2013 | 3.749.400 |
| **TOTAL EU28** | | | **28.036** | **09/09/2013** | **11/09/2013** | **412.555.713** |