

# European Rail: An Emerging Model For Sustainable Travel and Commerce

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## RAIL STATE OF PLAY: THE EUROPEAN CONTEXT

Western Europe remains the world's largest passenger rail market

Once a key threat, LCC competitive advantage diminishing

Airlines are rebounding, though rail remains competitive

High-speed rail connections could steal share from regional flights

Passenger rail companies lean on cargo for new revenues

Freight and logistics key to profitable rebound

Public investment flowing into European rail

## RAIL AND SUSTAINABLE DEVELOPMENT GOALS

Consumer sentiment for sustainability is growing

Rail an important pillar of EU sustainable development goals

European Green Deal fuels growth through investment

European countries top the Sustainable Travel Index

Central Europe stands out in sustainable rail

Austria: Global leader in sustainable transport

Sustainability incentives expected to boost passenger numbers

A continuous cycle of drivers supports long-term growth

## VALUE CREATION ON BOARD AND ON THE GO

An emerging marketplace for services in rail

More direct bookings, more consumer attention, more up-sell potential

Partnering with air for multi-modal passenger transport

Train stations are the new traffic hubs in Europe

Central stations recreating the mall experience for a new generation

Valora bets big on increased traffic at train stations

The return of overnight trains generates further up-sell potential

Three areas of opportunity for creating value in rail

Identifying three regions of opportunity beyond central Europe

## KEY TAKEAWAY

Key findings

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