



T H É M A

Essential



TRANSPORT

The 2024 French Rail Pass experimentation: a positive socio-economic outcome and satisfied users

MAY 2026

The French Rail Pass experimentation of 2024 enabled more than 200,000 young people to travel by train much more frequently, over longer distances and at a significantly lower cost for two months.

Acting only partly as a lever for modal shift (13% of trips originating from another mode of transportation), the scheme was mainly perceived as an incentive to travel more; with holders making an average of 11 trips. Despite an increase in the number of trips (rebound effect), it is estimated that the Pass has helped reduce emissions of local air pollutants and greenhouse gases (GHGs) nevertheless. For the user, the financial outcome is positive, as is the total socio-economic balance sheet, benefiting from the significant economic surplus of new users.

Public transport pricing is a powerful economic tool that can steer transport demand, thereby bringing about changes in mobility behaviour and impacting the economic and financial balance of the associated public services. In order to achieve ambitious climate targets in the transport sector (a 28% reduction in emissions by 2030 compared to 2015 and carbon neutrality by 2050 in France [1]) and to meet substantial social needs, a growing number of European countries have embarked on projects to standardise pricing and ticketing for their public transport systems. Following this trend, France has been developing a 'single ticket' scheme for several years and experimented with a 'Rail Pass' in the summer of 2024.

This publication reviews the Rail Pass experimentation from a socio-economic perspective and assesses the effectiveness of the fare policy in relation to the stated objectives (see *Methodology*).

MORE THAN EIGHT OUT OF TEN PASS USERS SATISFIED

With a sales target of 700,000, the Rail Pass sold 235,000 units, to approximately 210,000 unique customers (one in ten users purchased two consecutive Rail Passes during the summer). Regional Express Trains (TER) and Intercity Trains (IC) users who did not purchase a Pass, despite being eligible to do so, mainly justified their decision by the fact that it could not be used on High-Speed Trains (TGVs) and because the offer did not meet their specific needs. They therefore stated that they would be more inclined to buy the Pass if it provided access to TGVs and if its validity period was extended. Rail Pass users, who are also particularly sensitive to these last two points, report a high level of satisfaction (an average of 8.4/10) and are mainly satisfied with the scheme's attractive fare and its alignment with students' needs. The main reason behind their purchase is stated to be the possibility of unlimited travel at a low price, particularly on TER services.

REGULAR RAIL PASSENGERS

The age group targeted by the scheme (16 to 27 years old) creates *de facto* a typical profile for Pass users (which, however, hides many heterogeneities).

BOX

The Rail Pass

The Rail Pass scheme was introduced in July and August 2024. The scheme is aimed at passengers aged between 16 and 27 and provides unlimited access to TER and IC trains for a period of 30 consecutive days for a price of €49.

The Pass aims to meet three main objectives: mitigating climate change by encouraging a shift towards rail from more polluting modes of transportation (particularly private cars); making rail travel more affordable, particularly for groups that are highly mobile and on low incomes (in this case, young people); and improving accessibility of French regions.

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The typical beneficiary is a woman (51%), aged 21, student (two-thirds study in university and one-tenth in secondary school), living in her own home (60%) and on a modest annual income (less than €6,000 for 60% of Pass owners). Very few completely new train users were observed, as only one in twenty had not taken a train in the last 12 months, almost half say they frequently use the TER, and a third already have an SNCF¹ season ticket or discount card. These findings highlight the Rail Pass's ability to reinforce existing mobility behaviours by enabling train users to travel more often, further and for cheaper.

WITH THE PASS, MORE FREQUENT TRIPS...

On average, Pass holders got their money's worth by making 11 trips each over the summer – twice as many as the SNCF had anticipated for this scheme. With a total of 2.4 million trips (by comparison, 425 million trips were made on TER and IC services in 2024 [2]), the Pass was used mainly for TER, which accounted for 9 out of 10 trips booked using the Rail Pass. Indeed, whilst almost all Pass holders travelled at least once on TER, fewer than half travelled on IC.

These trips were not distributed evenly across France; in particular, the usually most touristic regions in summer were all over-represented in the distribution (Nouvelle-Aquitaine, Occitanie, Provence-Alpes-Côte d'Azur, etc.). Furthermore, most holders travelled outside of their Region, with two-thirds of TER customers travelling in at least two of them. Overall, the additional transport demand generated by the Pass has tended to boost existing tourist hotspots, with a few exceptions (numerous trips in Bourgogne-Franche-Comté, potentially for transit purposes).

... AND OVER LONGER DISTANCES

According to the operator's commercial data, trips made on TER and IC services using the Rail Pass covered average distances of 120 km and 500 km. Distances that are significantly longer than those typically travelled on these services: in 2024, the Transport Regulatory Authority (ART) reported average distances of 54 km and 336 km [2] per trip for TER and IC services, respectively. The patterns highlighted here (frequent inter-regional travel and longer distances) are consistent with the journey purposes stated by Pass holders, with nearly half of all trips being holiday-related. Excluding leisure travel, a quarter of trips are made for study or work-related reasons. The significant proportion of non-essential leisure-related trips appears clearly in the usage patterns reported by Pass holders: users state that without the Pass, they would have made less than half the trips recorded this summer (55% of induced trips), regardless of the mode of transportation. As for the trips they would still have made even without the Rail Pass, they state that more than a quarter would have been made using a different mode of transportation, highlighting a significant modal shift.

MANY NEW PASSENGERS, BUT NO OVERCROWDING ON TRAINS

The Rail Pass scheme is widely seen as a means of encouraging travel, which is in line with the desire to "Being able to travel more without paying more²", which emerged as the main reason for purchasing the Pass for 22% of customers. Assuming that the train service remained unchanged, this "rebound effect" on the number of trips could potentially have led to overcrowded trains. However, whilst there is no precise measurement of this impact, certain observations suggest that no major issues arose as a result of the Rail Pass. First, the trips associated with the scheme accounted for less than 5% of all TER and IC trips during this period. Furthermore, thanks to a quota system implemented for certain trains, only 1% of TER services and 7% of IC night sleeper services operated at full capacity for seats available at the Rail Pass fare. Finally, many Rail Pass bookings were made 'at the last minute' (70% on the day itself or a few days in advance), unlike bookings by customers without the Pass (70% more than a week in advance, 55% more than two weeks in advance). This behaviour largely favours users without a Pass, who book seats on trains before they reach their maximum capacity, whereas Pass users tend to book remaining seats.

Thanks to the Pass, the number of trips made by its holders has more than doubled (increase of around 55%), which not only impacts trains, but also other modes of transportation for the trips to and from train stations. Whilst the majority of the latter were made by public transport or by foot (two-thirds), almost a quarter were made by private car, which has an impact on the assessment of the scheme's environmental externalities.

AN INCREASED DEMAND IN TRANSPORT

The 210,000 Rail Pass holders report that, on average, they have tripled the number of trips they make on TER and IC services.

Among the 2.4 million trips made using the Rail Pass, 300,000 resulted from a modal shift (i.e., they would have been made using a different mode of transportation) and 1.3 million trips were induced by the Pass (i.e., they would not have been made at all). This represents almost 240 million additional passenger-kilometres across all modes of transportation (including 18 million made to travel to and from train stations) – (Figure 1). Furthermore, as TER are partly used to access TGVs (more than one in 20 TGV trips is combined with a TER trip [10]), a positive effect on the use of the latter is taken into account, generating more than 8,000 trips³.

Alongside this significant rebound effect on rail usage, 13% of trips made using the Rail Pass result from a modal shift, with over 5% coming from private cars and car-pooling. Thanks to this shift, 10 million vehicle.kilometres have been avoided on private road transport modes.

¹ The historical national rail operator in France.

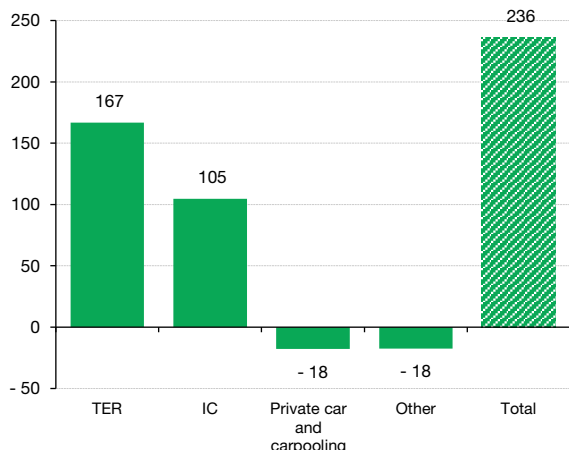
² As declared in the passenger survey of Rail Pass users.

³ This effect does not offset the reported modal shift away from TGV, amounting to around 36,000 trips avoided. This figure is calculated based on TER/TGV connection rates and on users' reports regarding the ability to replace the TGV with the TER and IC.



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Figure 1: Travel distances generated/avoided by mode
In millions of passenger.kilometres

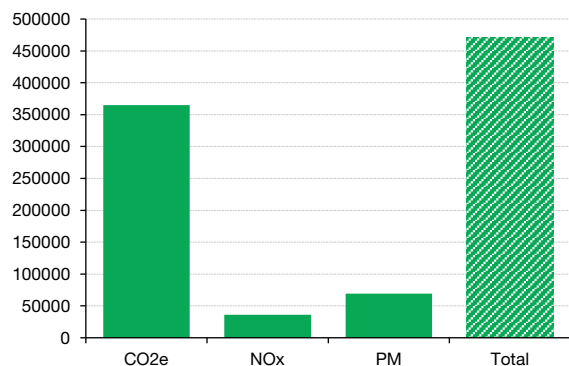


Source: CGDD

A MODAL SHIFT ENABLING A REDUCTION OF GREENHOUSE GAS AND POLLUTANT EMISSIONS

By reducing the use of private road transport, the avoided GHG emissions are estimated at around 1,600 tonnes of CO₂e. In terms of local air pollutants, the avoided emissions are estimated at 2.5 tonnes of nitrogen oxides (NO_x) and 0.3 tonnes of particulate matter (PM). The avoided social cost⁴ in terms of negative externalities is valued at a total of nearly €500,000 (Figure 2) after monetisation. However, the quantity of emissions avoided remains relatively low when compared to the number of users (7 kg CO₂e per Pass holder).

Figure 2: Monetised emissions avoided through a modal shift away from private road transport
In euros

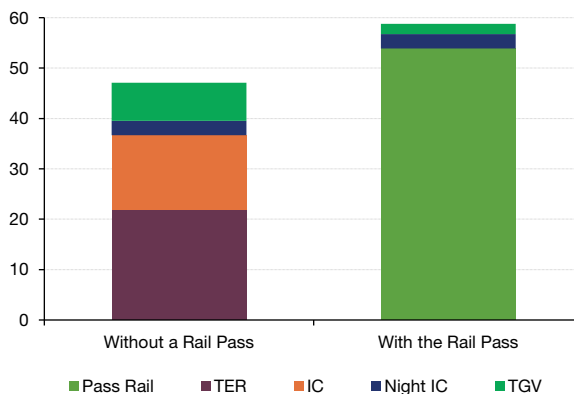


Note: It is assumed here that the effects of the Rail Pass on transport demand are not significant enough to trigger a change in the public transport offer; trips avoided or generated on train, plane or coach are therefore not included in the environmental assessment.
Source: CGDD

PASS HOLDERS SPENT MORE IN RAIL, BUT LESS AS A WHOLE

Taking into account the purchase of Rail Passes, sleeper supplements and a positive effect on TGV demand, the average Rail Pass user spent €59 on 'rail-related expenditure' linked to the Pass (including €54 on the purchase of 1.1 Passes) to make eleven trips during the summer (Figure 3). In the counterfactual scenario, this same user would have spent €47 on train tickets to make four trips, based on the average costs per kilometre of the various services and regions [2] and taking into account the SNCF season tickets held by some users. Ultimately, the Rail Pass would therefore have encouraged the average user to spend an additional €12 on rail to make seven additional train trips (including six induced trips and one resulting from a modal shift).

Figure 3: Rail expenditure per Rail Pass user
In euros



Source: CGDD

In addition to rail expenditure, the estimated modal shift brought about by the Pass leads to a reduction in user expenditure across three areas: fuel costs for private cars, expenditure on other modes of transportation, and tax transfers (notably fuel taxes). The savings in these categories balance out users' financial outgoings, resulting in a financial balance⁵ that is close to equilibrium (slightly positive) for the average user.

AN OVERALL POSITIVE SOCIO-ECONOMIC OUTCOME

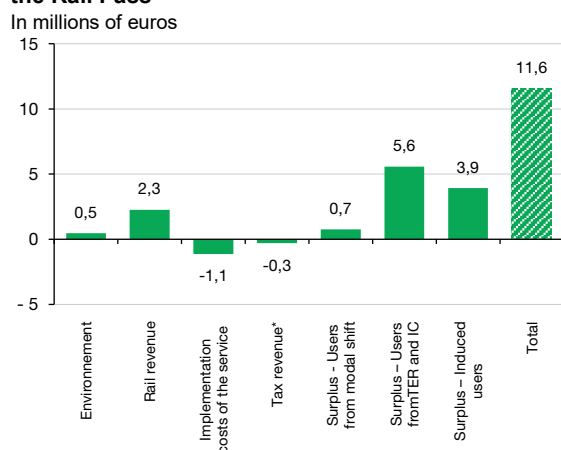
With only partial knowledge of the scheme's impact on public finances and rail revenue (and differing results depending on the calculation methods used), it is difficult to determine the overall socioeconomic impact of the Rail Pass. However, a number of factors can be highlighted (see methodology). In line with the socio-economic analysis framework for transport projects [3], the benefit or 'surplus' to users must be taken into account.

⁴ The monetisation of negative externalities is based on the values prescribed by the French socio-economic analysis framework for transport projects [2] as well as on the proposed trajectory for the value of climate action in France [4].

⁵ The financial analysis does not take socio-economic effects into account, but only market transactions. Furthermore, the avoided usage costs of the private car are underestimated here, as only fuel costs are taken into account

This represents the difference between the generalised cost of the traveller's previous economic activity (either the trip itself or another unknown activity for induced trips) and that of the trip⁶. From an overall perspective, the environmental benefits, changes in tax revenue and the costs of implementing the service must also be taken into account – even if they are relatively minor compared to the benefits to users – and the net result therefore appears to be largely positive, almost reaching €12 million (Figure 4).

Figure 4: Overall socio-economic assessment for the Rail Pass



*VAT and fuel taxes.

Source: CGDD

Other effects, whether positive or negative, can be estimated to test the robustness of this order of magnitude. For instance, to account for the imperfections of the tax system, the opportunity cost of public funds (OCPF)⁷ can be considered, which affects the socio-economic balance sheet, with a cost of around €0.3 million. Moreover, although not included in French methodological frameworks, certain methods allow for an estimation of 'social integration gains', representing the reduction in social exclusion enabled by increased access to mobility⁸. Applying these methods, the order of magnitude of these integration benefits could range from €2 million to €15 million. Finally, impacts related to road safety (reduced road use) or health benefits linked to active modes of transportation (increased walking and cycling in combination with rail travel) could be considered. It should be noted that potential savings in travel time are not considered here, as they are difficult to model in the case of the Rail Pass.

⁶ By convention [3], for induced trips, this surplus is estimated at half the surplus of non-induced users who did not change modes.

⁷ It can be argued whether the OCPF should be taken into account, as we currently have only a partial understanding of the scheme's impact on public finances (partly because these matters are managed at regional level for the TER); furthermore, it may potentially be overlooked to offset unaccounted-for redistributive effects of the scheme.

⁸ Positive over-valuation of the surplus linked to additional trips allowed by the scheme (as proposed in some studies on 'social pricing' [5] [6], and adopted in some official assessment frameworks outside of France [7]).

METHODOLOGY

The main data sources used in the context of this study are the following: commercial data from the 2024 Rail Pass experimentation, results of a market survey of 5,000 Pass holders and 1,700 eligible non-holders (conducted by Ipsos on behalf of the DGITM, SNCF Voyageurs and the Régions de France association), *ex-ante* Rail Pass studies by SNCF Voyageurs, scientific literature, and government statistical sources. [2] [3] [8] [9] [10]

In order to objectively assess the trends described regarding changes in travel behaviour brought about by the Rail Pass, a socio-economic analysis approach has been adopted. Two scenarios are compared: a scenario with the Rail Pass (real-life scenario) and a theoretical scenario without the Rail Pass (counterfactual scenario). These two scenarios are largely based on the operator's *ex-post* findings as well as on the user survey. The scope of this analysis is limited to the Rail Pass users only and their mobility linked to the scheme. This assessment only covers the months of July and August 2024. It therefore does not take into account potential impacts on mobility behaviour in the medium to long term. All monetary values are given in €2024.

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