

Quantitative surveys conducted by BVA

Main lessons and detailed analyses of Lyon-Turin studies

September 2019

This summary aims to review the **binational (France and Italy), multi-level** (national, regional and local) **quantitative "mirror" surveys conducted between June and July 2019** on the following samples representing the population aged 18 and over in the areas concerned:

- **In France:** 1000 French people representing the domestic population, 601 inhabitants of the Rhône-Alpes region, 302 inhabitants of the city of Lyon and 403 inhabitants of the Maurienne Valley.
- **In Italy:** 1000 Italians representing the domestic population, 600 inhabitants of Piedmont, 292 inhabitants of Turin and 401 inhabitants of the Susa Valley.

The samples were constructed using the quota method. The field work was carried out by BVA with online or telephone data collection depending on the area.

1. The main lessons learned

The Lyon-Turin project boasts powerful opinion levers.

In an environment where rail freight is in high demand (more than 95% of respondents at all levels in France, more than 87% in Italy say they are in favour of developing freight transport by train rather than by road in Europe), **Lyon-Turin enjoys mass and consensual support** (i.e. a majority in all age groups, social groups and electorates) in France (93%), Italy (86%), Rhône-Alpes (84%) and Lyon (82%), Piedmont (83%) and Turin (84%) and the Maurienne Valley (77%). While the opinion ratio is more divided, the survey also shows that the "**pro-tav**" make up a majority in the area at the heart of the dispute, the Susa Valley (54% against 38%, and 8% "don't know").

There is a consensus as to the usefulness, even the necessity, of the project.

Whatever the controversy in Italy may have been: 89% of the French, 81% of the Italians, 82% of the inhabitants of Rhône-Alpes, 84% of those of Piedmont, 74% of the inhabitants of the Maurienne Valley and 54% of those of the Susa Valley consider that the Lyon-Turin line **is an investment "that must be made"**.

Within the territories traversed, the project is perceived as mainly positive by the inhabitants.

63% of the inhabitants of Rhône-Alpes, 77% of those of Piedmont and 58% of those of the Maurienne Valley **believe that the project will bring more advantages than disadvantages to their area. The perception of benefits is also higher in the Susa Valley** but in a closer opinion ratio (45% against 32%).

The reasons for support are not the same in France and Italy.

While all arguments in favour of the project (ecological, employment, strengthening European unity, development of transport and mobility) play well, indeed very well, overall, the survey makes it possible to refine the results and show that the reasons for support are not the same in France and Italy.

In France, ecological considerations (the fight against global warming and air pollution) dominate, while in **Italy perceptions about the economic and social interest of the project take precedence** (improvement of infrastructure and travel conditions, job creation, etc.).

In all international surveys (and also in electoral results), this concern for environmental issues is more pronounced in French public opinion than in Italian public opinion.

In the Susa Valley, opponents' main reasons for their opinions are the cost of the project and the fear of destruction of their surroundings and environment.

"Reducing truck traffic" is the argument that plays best.

The argument that plays best across the board, in both countries, and at all levels, is the reduction of truck traffic. This is a reason for project support that is also emphasized in the open question, in both countries, at all levels. **Reducing truck traffic means less pollution, less noise, less nuisance and increased safety, traffic flow and peace on the roads. In short, it is an argument that convinces, that bodes well for the future (vs. a current situation experienced as unpleasant).**

The Italians are very well informed about the progress of the work on the French side.

More than seven out of ten inhabitants of Piedmont, Turin, and the Susa Valley say they know that work has begun in the Maurienne Valley. Work that causes disruption to **44% of the inhabitants of the Maurienne Valley.**

The political controversies and disputes in Italy have not weakened the support of Italian and French opinion for Lyon-Turin.

They even seem a little "airy-fairy" in light of a project that enjoys very broad support and which even has the merit, at a time of growing divisions between the elite and the people, of bringing all social classes together behind it.

This same "disconnection" is found in France between the Green party's position and the opinions of its supporters: 94% of Green party supporters at national level, and 86% at regional level, are in favour of Lyon-Turin.

The survey therefore shows that Lyon-Turin enjoys **the approval of a very large majority of opinion and is in fact contested only by an "active minority" in the Susa Valley.** This radically distinguishes it from other

contested projects in France, such as Notre Dame des Landes or EuropaCity, which have never had such high levels of support.

As we can see, the project enjoys very broad popular support.

2. Detailed analyses, on the French side.

The results in France.

The survey shows that the Lyon-Turin project is fully accepted in French public opinion, which perceives it as an infrastructure project that improves transport and mobility and as an effective response to pollution problems and the climate emergency.

The Lyon-Turin project is known to most French people. However, this awareness still needs to be consolidated and nurtured: two thirds of French people say they have heard of Lyon Turin but only one third say they know exactly what it involves.

Whatever the controversies and disputes in Italy, the project enjoys unanimous support in France: **93% of respondents said they were in favour** (36% "completely", 57% "quite").

This support is totally consensual: it exceeds 90% in all age groups, in all socio-political categories and in all electorates. The Green party's leadership thus seems to be out of step with its supporters, with 94% of them saying they are in favour of the project. **This is partly explained, in a context of a strong increase in environmental concerns** (environmental protection has risen by 20 points in a year and a half in the hierarchy of French concerns¹) by the **support of the French people for rail freight:** 96% (including 62% "completely", which underlines the solidity of these opinions) are in favour of the development of freight transport by rail rather than by road in Europe.

The improvement of mobility and ecological considerations are also raised in the open question as the main arguments put forward by the French to justify their support for the project: 28% of spontaneous responses mention the fact that there will be fewer trucks in the Alpine valleys, 22% the ecological nature of the project which will reduce CO2 emissions, 22% also mention the reduction of travel times... Economic reasons (development of business, tourism) are much less spontaneously mentioned. **This open question also raises an argument that has not been raised often so far; that of road safety** (5% of comments), since fewer trucks means more safety and peace of mind on the roads.

The test of arguments confirms the massive and consensual support of the French people for the project. More than eight out of ten French people consider that the project is a good way of relieving congestion in the valleys caused by truck traffic, fighting against air pollution and global warming, improving the economic and tourist attractiveness of the areas concerned or promoting employment. The need for investment is not

¹ Emmanuel Macron's Year III. Perceptions and expectations. Kantar survey, September 2019.

an issue: 89% of respondents felt that this should be carried out even if 64% considered the project "too expensive".

The results within the Lyon and Rhône-Alpes regions.

The Lyon-Turin project enjoys a good reputation and very high popularity in the Lyon and Rhône-Alpes regions. It is perceived as a winner for the city and its region by a large majority of inhabitants. The reduction of truck traffic, the fight against air pollution and the improvement of travel conditions appear to be the main benefits.

The Lyon-Turin project enjoys a good and sustained reputation in the region: **three quarters of the inhabitants of Rhône-Alpes and Lyon have heard about it and six out of ten say they know exactly what it involves. It is within the framework of a context where social demand for the development of rail freight is unanimous in these territories (96%).**

It has **no opposition within these territories**: only 6% of Rhône-Alpes residents and 3% of Lyon residents say they are opposed to it... More than 80% are in favour, while 10 to 15% of the population have no opinion yet. As at the national level, support for the project is fully consensual at the regional and metropolitan levels. It includes 84% of Green party supporters. Fewer trucks on the roads (37% of comments), less pollution (28%) and shorter journey times (21%) are, in the open question, the main reasons for supporting the project mentioned by the inhabitants of Lyon and its region.

All arguments in favour of the project play very well with the population of Lyon and Rhône-Alpes, with support rates ranging from 76% to 91%. **The reduction of truck traffic and the fight against air pollution head concerns, and are the ones that elicit the strongest agreement**, with a majority of respondents saying they "strongly agree" with them.

Ultimately, the project is perceived as a major winner for the Lyon metropolis and region by two thirds of the inhabitants:

- 63% of Rhône-Alpes residents consider that it will bring more advantages than disadvantages to their region, with only 7% holding the opposite opinion (27% considering that it will bring neither more nor less advantages than disadvantages and 3% not commenting);
- 66% of Lyon residents consider that it will bring more advantages than disadvantages to their city, only 4% holding the opposite opinion (28% considering that it will bring neither more nor less advantages than disadvantages and 2% not commenting).

Results in the Maurienne Valley.

Known to all, the Lyon-Turin project is widely supported in the Maurienne Valley. The survey makes it possible to quantify a very minority opposition rate, of around 18%. The project is widely perceived as a winner for the territory, particularly in terms of reduced truck traffic and controlling air pollution. A significant share of the population (44%) claims to be affected by construction disruption without this having a strong impact on the project's popularity at this stage.

The survey reveals two other lessons: on the one hand, that a significant proportion of the valley's youth, around a third, are against the project; on the other hand, that the cost argument is more significant in the valley than at the national and regional levels.

Lyon-Turin is known in detail to almost all inhabitants of the Maurienne Valley: 93% have heard of it and 87% know exactly what it is. 92% know that work on the line has commenced in their area. This very high recognition is accompanied by **high popularity**: 77% of the inhabitants of the valley say they are in favour of the project (36% "completely" and 41% "quite"). **However, the opposition rate (18%) is slightly higher than at the national (7%) and regional (6%) levels. Compared to the average, it is particularly high among 18 to 24-year-olds (33%). In a context where there is a broad consensus on the project, a minority of young people are yet to be convinced in this area.**

Fewer trucks on the roads (42% of comments) and less pollution (29%) are the main arguments put forward in the open question to justify support for the project.

In this area, and as at the national and regional level, while all the arguments play well, it is those concerning the fight against air pollution (83%) and the reduction of truck traffic in the Alpine valleys (82%) that have the broadest and strongest support. Conversely, in this valley, **the argument of individual benefit is the one that plays the worst**: "only" 53% agree with the argument that the project will improve the daily mobility of the valley's inhabitants. **It is therefore above all the collective benefits that make the project popular. Cost remains an important issue in terms of opinion within the valley**, with significantly more inhabitants (76%) than at a national (64%) and regional (67%) level considering the project "too expensive". However, this does not call the need for investment into question: 74% believe that it is an investment that must be made. **As at the regional level, the perception that the territory will benefit from the implementation of this project is held by a majority**: 58% of inhabitants consider that the project will bring more advantages than disadvantages to their region, whereas 14% believe that it will bring more disadvantages than advantages, 25% consider that it will bring neither one nor the other and 3% did not give an opinion. **Once again, negative opinions are highest among 18 to 24-year-olds** (33% considering that the project will bring more disadvantages than advantages to their region).

When it comes to works, 14% of the inhabitants of the region say they experience "a lot" of disruption and 30% "a little" disruption. In total, the issue of disruption therefore concerns a significant proportion of the local population (44%). Young people are by far the most likely to report disruption in their day to day lives (67%).

3. Detailed analyses, on the Italian side.

The results in Italy.

The state of Italian opinion in no way reflects the extent of the political controversies and opposition concerning Lyon-Turin. Very widely known, the Lyon-Turin project is also very widely supported in Italian public opinion. Unlike France, ecological arguments are less decisive in terms of the structure of support

within Italian opinion. It perceives the project first of all as a necessary piece of infrastructure, useful for the development of trade and mobility and the facilitation of transport conditions for passengers and goods in Italy and Europe. As in France, in Italy, the reduction of truck traffic is a major lever for support for the project. In short, what is being debated within the Italian political class is not being debated at all within the general public. In light of public opinion, Italian political controversy even seems to be out of touch.

Lyon-Turin enjoys a strong reputation in Italy (81%). It is worth noting that in the open question **the term "TAV" is spontaneously associated with Lyon-Turin by only 17% of respondents**, the others referring only to trains or high-speed lines in general or saying they do not know.

Political disputes and controversies around the subject do not seem to have eroded its continued massive support: 86% of the Italians surveyed said they were in favour of the Lyon-Turin project (37% "completely" and 49% "quite"), with only 14% saying they were against it. **As in France, the demand for the development of freight transport by train rather than by road is unanimous in Italy (96%).**

Unlike in France, **ecological arguments are very rarely raised** in the open question as reasons for supporting the project. **What is most important in Italy, first and foremost, is the perception of the creation of necessary infrastructure, which will improve travel conditions and mobility. The reduction of travel times, the facilitation of freight transport and trade, the economic utility of the project and the reduction of road traffic congestion are the main arguments for the spontaneous support put forward by the respondents.** As in France, the argument of "fewer trucks" is one of the main perceived benefits of the line.

The argument test confirms these differences in views between Italian and French opinion. **While in Italy all the arguments also play well for the most part, that concerning the fight against global warming (67%) has a less broad and less firm support than those concerning improving the link between Turin and Lyon and Paris (90%) and improving exchanges and mobility (85%).** Italians are also particularly sensitive to the "employment" argument (86%).

One argument plays equally well in both countries, that of reducing truck traffic, which 87% of Italians agree with.

Finally, the debate in the country on whether or not to carry out the project has not weakened public perceptions: **81% of Italians consider it to be an investment that must be made, even though 65% consider it too expensive.**

The results in Piedmont and Turin.

The inhabitants of Piedmont and Turin are well acquainted with and massively support Lyon-Turin, which is perceived as a necessary project to improve travel, and useful from an economic and social point of view. They are broadly convinced that their regions have everything to gain from the completion of this project.

Three quarters of the inhabitants of Piedmont and Turin are familiar with the Lyon-Turin rail line project. And more than seven in ten know that work on the project has begun in the neighbouring Maurienne Valley.

In the region, as in the city, and unlike the national situation, **the term "TAV" is spontaneously understood to mean Lyon-Turin by a large majority of respondents** (63% in Piedmont, 70% in Turin).

Support for the project is mass and consensual in the region and in the city: 83% of the inhabitants of Piedmont and 84% of those of Turin are in favour. The opposition amounts to less than 10% of the inhabitants within these territories. Support is very largely dominant in all age and social categories

The improvement of transport and travel conditions (saving time, fewer trucks on the roads, etc.) and the economic interest of the project (facilitating trade) are the spontaneous arguments put forward in support of the project, well above ecological considerations mentioned by only 12% of inhabitants.

All arguments in favour of the project receive majority support by the populations of these areas, those on **improving links and mobility, reducing truck traffic and employment having a stronger impact** than those concerning the fight against air pollution or global warming. In this respect, the state of opinion in Piedmont opinion is completely in line with that of Italian opinion.

It should also be noted that, while the Italian debate is focused mainly on the cost of the project, "only" **55% of the inhabitants of Piedmont and 53% of those of Turin consider the project to be too expensive**, levels lower than those seen in France. **84% of the inhabitants of Piedmont and 86% of Turin consider that Lyon-Turin is an investment that must be made.**

As in Rhône-Alpes and Lyon, and in even greater proportions, **the project is perceived as being a winner for the city and region:** 77% of the inhabitants of Piedmont and 78% of Turin believe that it will bring more advantages than disadvantages to their region/city.

The results within the Susa Valley.

The survey reveals that although the Susa Valley is the only area where a significant minority (around 40%) is against Lyon-Turin, the fact remains that the project is supported by a majority. Opposition is mainly based on the cost of the project and the fear of destroying the valley's natural heritage. Support is based on improved travel and the economic interest of the project, particularly in terms of job creation. In this area, with the exception of the reduction in truck traffic, which is gaining support, ecological arguments in favour of the project have little impact. Ultimately, and in the area at the heart of the dispute, the main lesson is that Lyon-Turin still finds majority support there.

78% of the inhabitants of the Susa Valley know of Lyon-Turin and 53% spontaneously associate the term "TAV" with the project. 74% know that work has started on the French side.

The opinion ratio is closer in this valley than anywhere else, but **the "pro-tav" are in the majority:** 54% of the inhabitants of the valley say they are in favour of the project (25% "completely" and 29% "quite") while 38% are against it (25% "completely" and 13% "quite"), with 8% don't know.

The economic interest of the project, and in particular the creation of jobs, and the improvement of transport conditions are the main arguments spontaneously put forward by the project's supporters; its

opponents, on the other hand, highlight the uselessness of the project (45%) and its ecological impact, particularly the risk of destruction of the valley (38% of comments) and its cost (29%).

The argument test confirms these representations. **70% of the valley's inhabitants see the project as too expensive and "only" 54% consider it as an investment that must be made**, a level much lower than that recorded in Italy and Piedmont.

The arguments on the development of tourism in the region and the fight against global warming only receive minority support in this area. The improvement of the link between Turin and Lyon and Paris (72%), the improvement of mobility and exchanges (63%), the reduction of truck traffic (62%) and employment (60%) play the best, but with lower levels of support than those recorded in Italy and Piedmont.

Ultimately, a relative majority of the inhabitants of the Susa Valley (45%) believe that the Lyon-Turin line will bring more advantages than disadvantages to their territory, 32% holding the opposite opinion, 19% considering that it will not change anything, and 4% expressing no opinion. The perception of a positive impact prevails in all age and social categories of the population of the valley.