



Perception of Rail Freight in Europe

Survey report

November 2025



RESEARCH METHODOLOGY



Research Methodology



This survey has been conducted online through CAWI method (Computer Assisted Web Interview) on a sample representative of the European Union 18+ population.



The total sample size is 5,409 complete interviews, distributed proportionally to the population of the 27 EU countries with a slight correction which allows to analyze the data on the pan-European level, with breakdowns for the 5 largest countries (Germany, France, Italy, Spain and Poland) and for 3 different areas: Eastern Europe, Northern Europe, Southern Europe. For each country proportional quotas were set for age and gender. Quotas were calculated regarding the most recent parameters provided by Eurostat.



Interviews were collected between the 17th and 29th of September 2025.



The report shows breakdowns by the following geographical areas:

- 1) Germany 
- 2) France 
- 3) CEE – Central and Eastern Countries (Baltic states, Poland, Czech R., Slovakia, Hungary, Romania, Bulgaria, Croatia, Slovenia) 
- 4) Northern Countries (Sweden, Denmark, Finland, Belgium, Netherlands, Lux., Ireland, Austria) 
- 5) Southern Countries (Spain, Italy, Portugal, Greece, Malta, Cyprus) 

   + separate data for Italy, Spain and Poland.

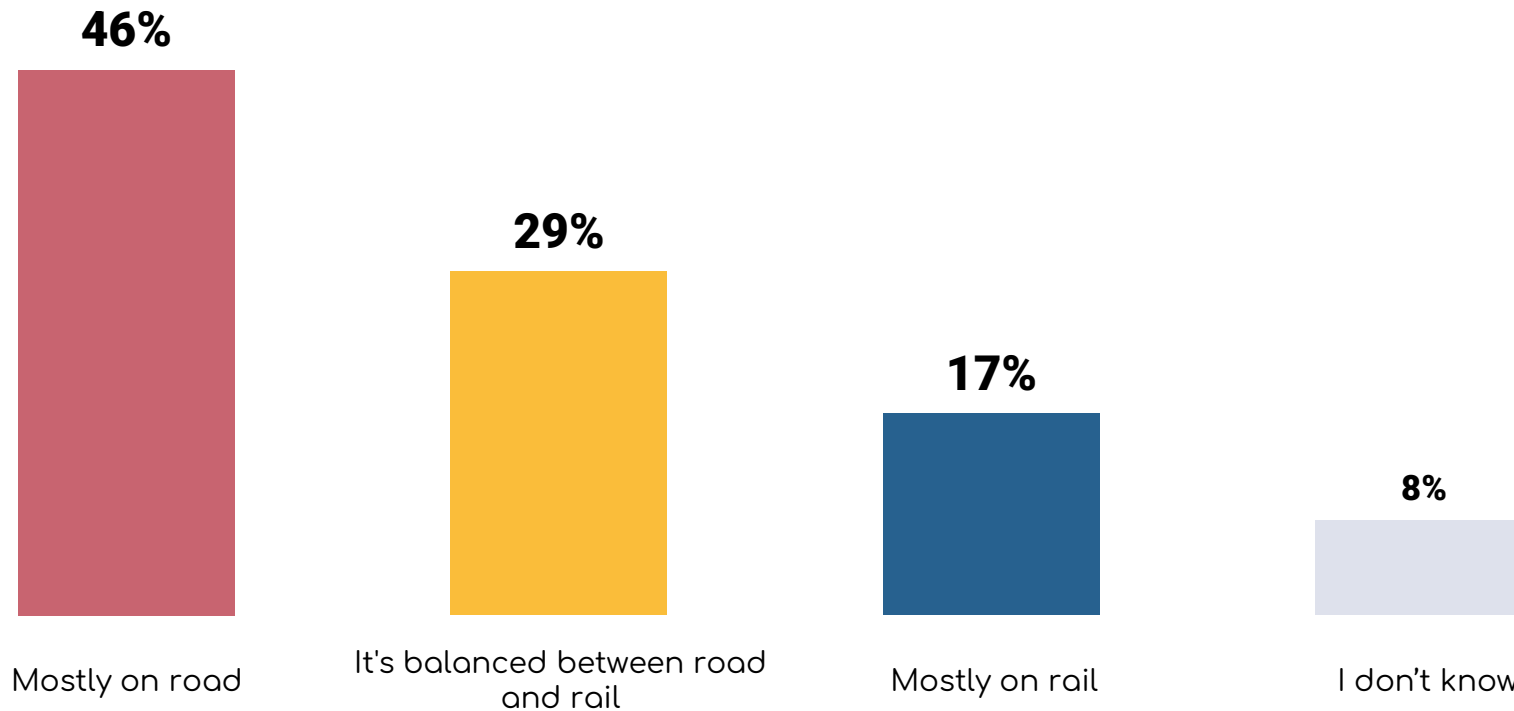
A decorative graphic on the left side of the slide, consisting of several concentric circles in shades of blue, with a solid yellow circle at the center. A white horizontal line is positioned to the left of the innermost blue circle.

PERCEPTION OF RAIL FREIGHT IN EUROPE



Modes of land transportation for Europeans

All respondents: 5,409



Almost 1 in 3 European citizens believe that the transport of goods is balanced between road and rail.



Modes of land transportation for Europeans

All respondents: 5,409

Split according to geographical areas

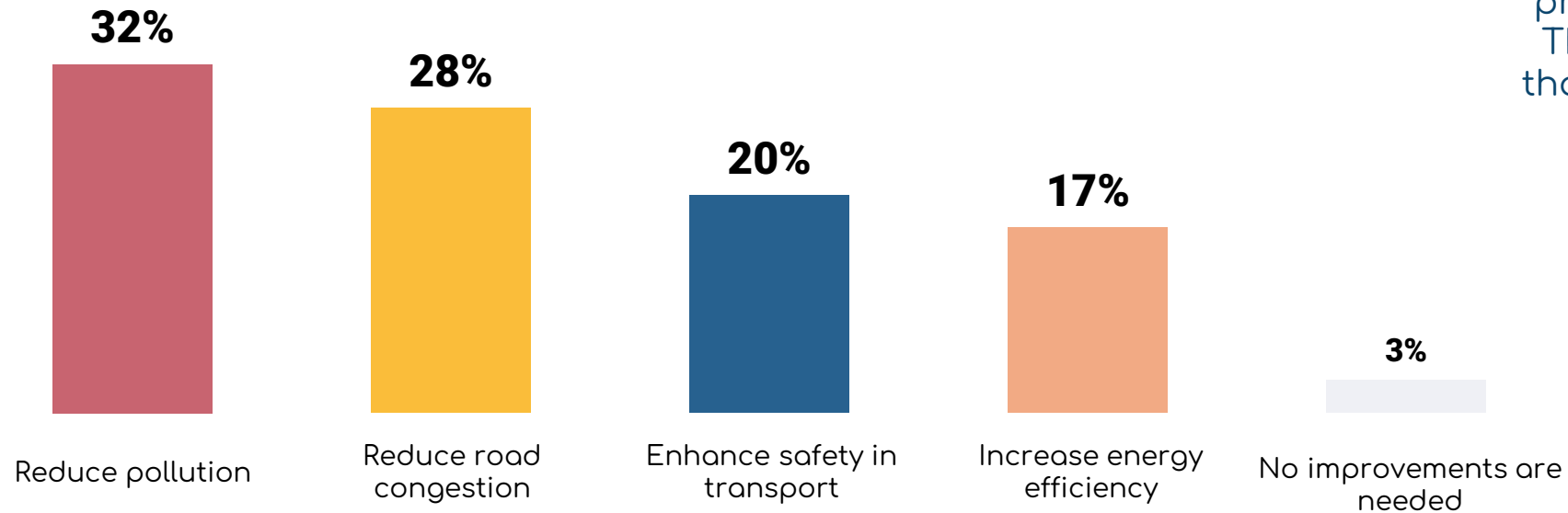


	TOTAL	France	Germany	Italy	Spain	Poland	Southern Europe	CEE	Northern Europe
Base	5,409	679	841	591	667	477	1,562	1,230	1,097
<i>Mostly on road</i>	45%	56%	47%	63%	43%	29%	52%	35%	36%
<i>It's balanced between road and rail</i>	29%	20%	30%	17%	31%	40%	25%	37%	34%
<i>Mostly on rail</i>	18%	12%	14%	12%	18%	24%	15%	21%	22%
<i>I don't know</i>	8%	12%	9%	8%	8%	7%	8%	7%	8%



Improvements needed in land transport of goods

All respondents: 5,409



Pollution and road congestions are the priorities to address. The quota believing that no improvements are needed is negligible.



Improvements needed in land transport of goods

All respondents: 5,409

Split according to geographical areas

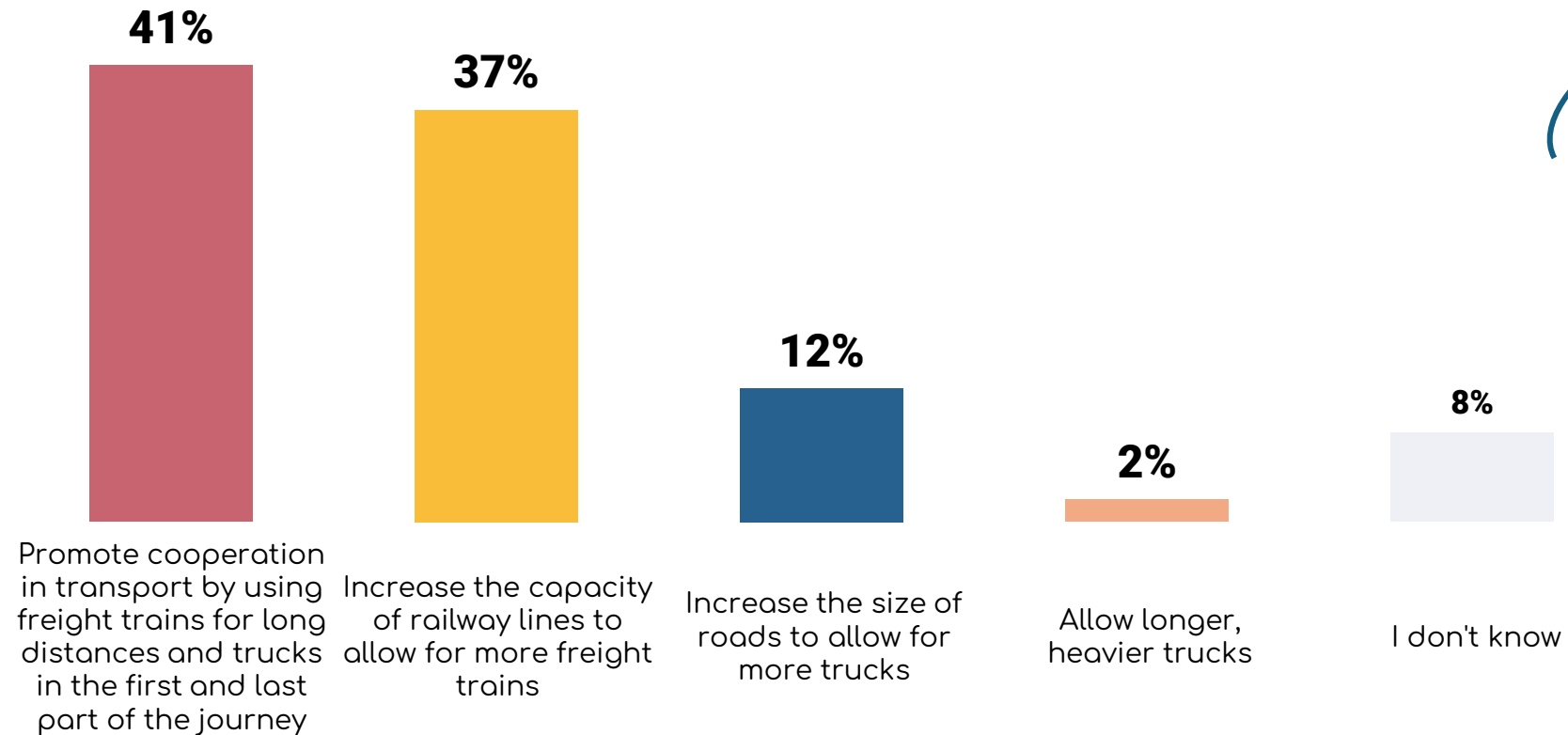


	TOTAL	France	Germany	Italy	Spain	Poland	Southern Europe	CEE	Northern Europe
Base	5,409	679	841	591	667	477	1,562	1,230	1,097
<i>Reduce pollution</i>	32%	34%	27%	35%	35%	28%	34%	30%	35%
<i>Reduce road congestion</i>	28%	35%	32%	33%	20%	25%	27%	25%	26%
<i>Enhance safety in transport</i>	20%	15%	18%	15%	20%	24%	20%	25%	17%
<i>Increase energy efficiency</i>	17%	12%	20%	13%	22%	18%	16%	17%	19%
<i>No improvements are needed</i>	3%	4%	3%	4%	3%	5%	3%	3%	3%



Best way to improve transport of goods in Europe

All respondents: 5,409



Both solutions most identified by Europeans involve an increase in the shift of commercial traffic from road to rail.



Best way to improve transport of goods in Europe

All respondents: 5,409

Split according to geographical areas



	TOTAL	France	Germany	Italy	Spain	Poland	Southern Europe	CEE	Northern Europe
Base	5,409	679	841	591	667	477	1,562	1,230	1,097
<i>Promote cooperation in transport by using freight trains for long distances and trucks in the first and last part of the journey</i>	41%	41%	42%	40%	41%	41%	42%	39%	42%
<i>Increase the capacity of railway lines to allow for more freight trains</i>	37%	42%	32%	42%	36%	33%	39%	38%	34%
<i>Increase the size of roads to allow for more trucks</i>	12%	5%	14%	11%	13%	18%	12%	15%	14%
<i>Allow longer, heavier trucks</i>	2%	3%	3%	1%	2%	2%	1%	2%	2%
<i>I don't know</i>	8%	9%	9%	6%	8%	6%	6%	6%	8%



Photo by christian-lue on Unplash



Polling Europe is an innovative research firm born from the esteemed collaboration of SWG and OpinionWay, two premier market and social research entities from Italy and France.

Located in the heart of Brussels, Polling Europe specializes in conducting comprehensive public affairs surveys and opinion polls, delving into the nuanced landscape of EU public opinion. Our expertise spans both ad hoc research endeavors and meticulously crafted multi-client surveys, providing quick and cost-effective insights into European public opinion.

With a commitment to excellence and a dedication to unveiling Europeans dynamic socio-political climate, Polling Europe will be a trusted partner in answering your questions regarding the future of Europe.

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