



Perception of sustainable tourism and railways

Survey report

August 2026



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 5,048 complete interviews, distributed proportionally to the population of the 27 EU countries with a slight correction which allows to analyse 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 3rd and 10th of July 2026.



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.

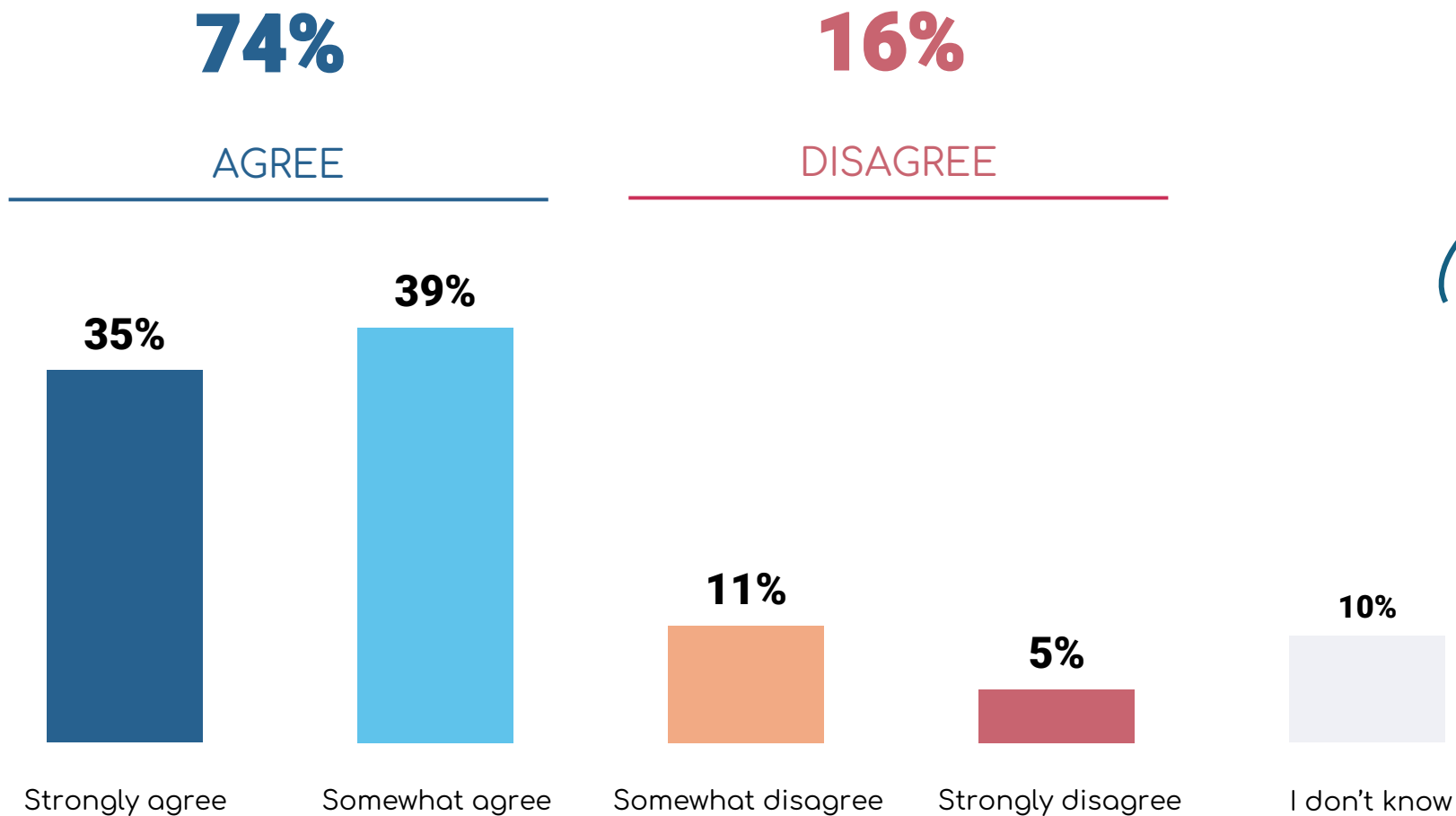


SUSTAINABLE TOURISM



Importance of promoting train travel to make tourism sustainable

All respondents: 5,048



Wide agreement that travelling by train is functional to a greater sustainability of tourism in Europe



Importance of promoting train travel to make tourism sustainable

All respondents: 5,048

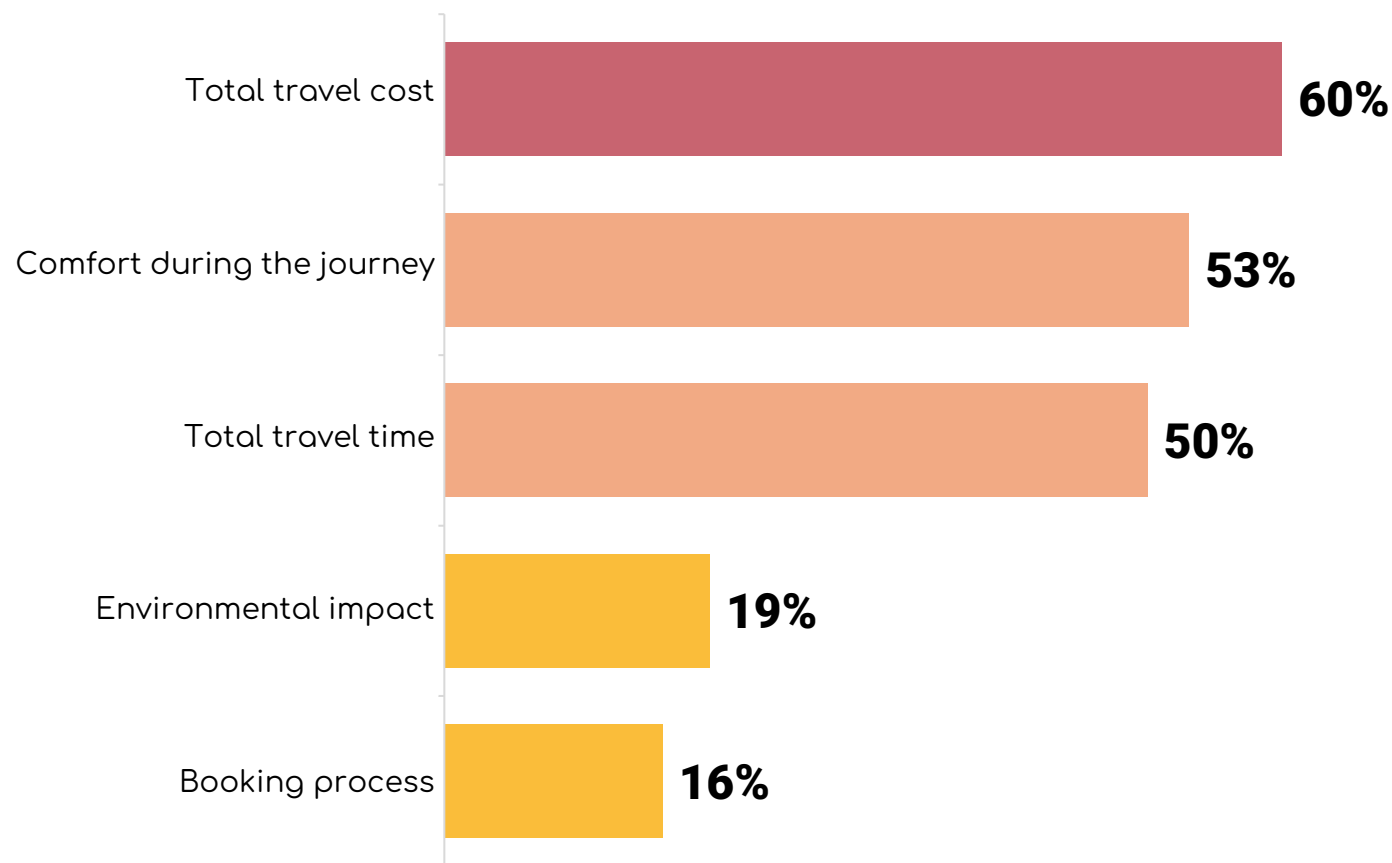
Split according to geographical areas

									
	TOTAL	France	Germany	Italy	Spain	Poland	Southern Europe	CEE	Northern Europe
	Base 5,048	674	827	586	544	417	1,387	1,165	995
Strongly agree	35%	25%	32%	37%	43%	31%	42%	36%	32%
Somewhat agree	39%	43%	41%	42%	32%	43%	37%	39%	37%
TOTAL AGREE	74%	68%	73%	79%	75%	74%	79%	75%	69%
Somewhat disagree	11%	9%	12%	9%	11%	10%	10%	11%	14%
Strongly disagree	5%	7%	7%	5%	4%	4%	4%	4%	7%
TOTAL DISAGREE	16%	16%	19%	14%	15%	14%	14%	15%	21%
I don't know	10%	16%	8%	7%	10%	12%	7%	10%	10%



Factors influencing the choice of mode of transport

All respondents: 5,048



Cost, comfort and travel time are the top priorities of Europeans when travelling to neighbouring European countries. Less than one European out of five prioritises the booking process.



Factors influencing the choice of mode of transport

All respondents: 5,048

Split according to geographical areas



	Base	TOTAL	France	Germany	Italy	Spain	Poland	Southern Europe	CEE	Northern Europe
		5,048	674	827	586	544	417	1,387	1,165	995
Total travel cost		60%	76%	56%	61%	58%	59%	61%	55%	56%
Comfort during the journey		53%	52%	47%	50%	53%	59%	52%	61%	51%
Total travel time		50%	55%	51%	51%	45%	48%	49%	50%	49%
Environmental impact		19%	16%	21%	14%	20%	23%	16%	21%	21%
Booking process		16%	11%	17%	11%	17%	18%	14%	18%	18%

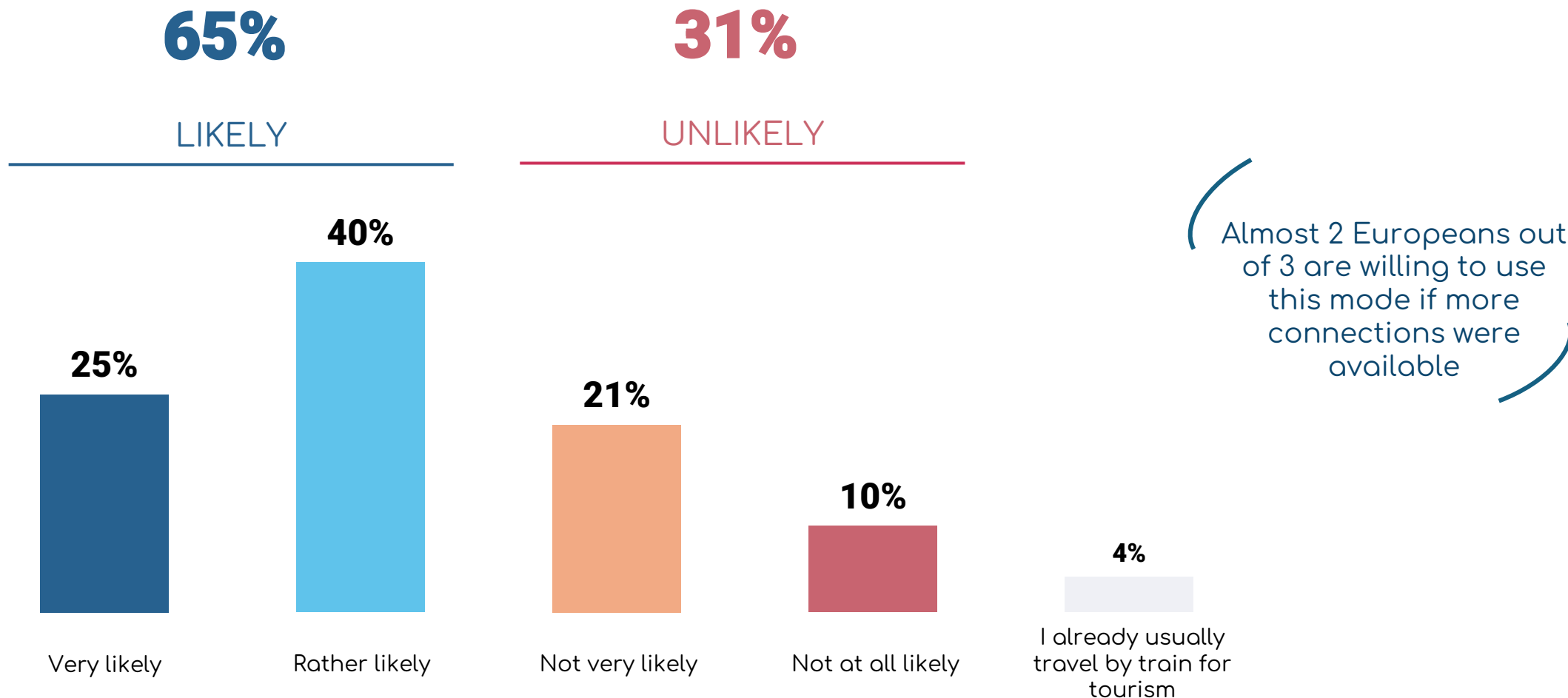
Q. When travelling for tourism within your country or to neighbouring European countries, what factors most influence your choice of mode of transport?

Up to three possible answers, total exceeding 100%



Likelihood of using train to travel for tourism

All respondents: 5,048



Q. If more train connections were available for tourism travel within your country or to neighbouring European countries, how likely would you be to change your choice of mode of transport and travel by train? (Select 1 option)



Likelihood of using train to travel for tourism

All respondents: 5,048

Split according to geographical areas

									
	TOTAL	France	Germany	Italy	Spain	Poland	Southern Europe	CEE	Northern Europe
	Base 5,048	674	827	586	544	417	1,387	1,165	995
Very likely	25%	20%	19%	28%	30%	28%	30%	29%	20%
Rather likely	40%	36%	34%	44%	44%	46%	43%	44%	40%
TOTAL LIKELY	65%	56%	53%	72%	74%	74%	73%	73%	60%
Not very likely	21%	25%	26%	18%	16%	16%	17%	17%	25%
Not at all likely	10%	16%	15%	7%	5%	5%	6%	6%	10%
TOTAL UNLIKELY	31%	41%	41%	25%	21%	21%	23%	23%	35%
I already usually travel by train for tourism	4%	3%	6%	3%	5%	5%	4%	4%	5%

Q. If more train connections were available for tourism travel within your country or to neighbouring European countries, how likely would you be to change your choice of mode of transport and travel by train?



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.

Office

Square de Meeûs 35
1000 Brussels

Rado Fonda

Deputy Managing Director – Head of Research
rado@pollingeurope.eu

Bruno Jeanbart

Deputy Managing Director – Head of Research
bruno@pollingeurope.eu



BRUSSELS
Square de Meeûs 35
1000 Brussels

info@pollingeurope.eu

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