

opinionway,



Exploring Europe by Night: *Insights into Night Train Travel Preferences*

Research report | October 2025





Methodology

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Research Methodology

Any total or partial
publication must

include the following full
mention:

« Research carried out by
OpinionWay and Polling
Europe »

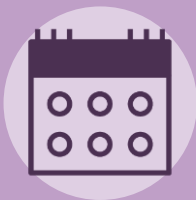
No reproduction of the survey
may be dissociated from this
title. Thanks !



This survey was conducted on a sample of **5,107 people**, representative of the population of the **European Union aged 18 and over**.

The interviews were distributed **proportionally to the population of the 27 EU countries**, with a slight adjustment to allow for analysis at both the **pan-European level** and by subgroups for the **five largest countries** (Germany, France, Italy, Spain, and Poland), as well as for **three geographical areas**: Eastern Europe, Northern Europe, and Southern Europe. For each country, **proportional quotas** were established according to **age and gender**, calculated based on the **most recent parameters provided by Eurostat**.

The sample was interviewed **using a self-administered online questionnaire** via the **CAWI system (Computer Assisted Web Interviewing)**.



The interviews were conducted from **September 17th to 29th 2025**.

OpinionWay and Polling Europe conducted this survey in accordance with the **procedures and rules of ISO 20252**.



The results of this survey should be interpreted taking into account **the margins of uncertainty**: 0.6 to 1.5 points at most for a sample of 5,000 respondents.

Context



- **Closure** of the Paris–Berlin and Paris–Vienna night train lines, **delays to new line projects** supported by the European Commission... The night train sector is experiencing **significant turbulence**, particularly in **the lack of sufficient of support** from various European countries.
- Through this European study, OpinionWay sought **to gauge European citizens' enthusiasm for this mode of transport** and understand whether, from their point of view, night trains are a relic of the past or, on the contrary, **represent a promise for the future**.



Results

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#1

Europeans overwhelmingly
favour night trains for future
travel in Europe

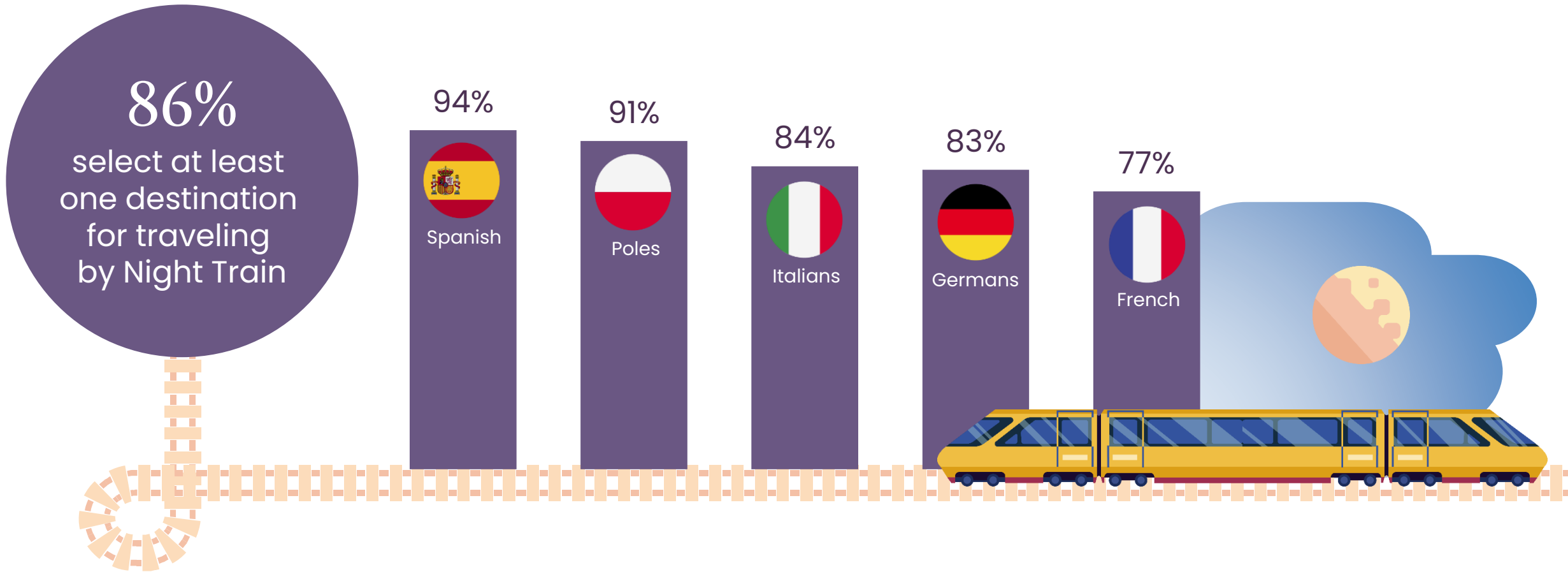


Night trains are highly popular among Europeans for future travel in Europe. This strong demand from citizens is being held back by the current availability of services.



5,409
respondents

Q. If night trains were available from your country to other European countries, which destinations would you consider travelling with this mode of transport?



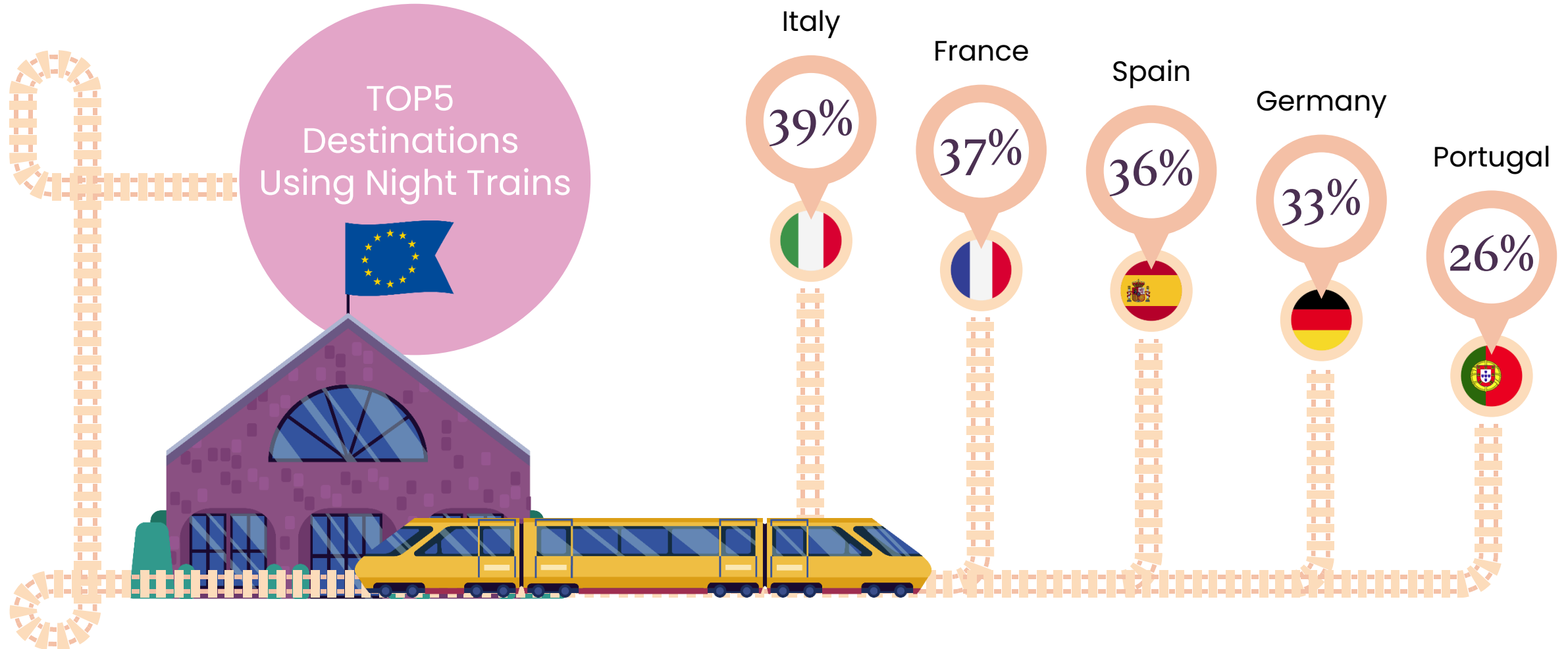


Italy, France & Spain: the winning trio for night train desires with more than a third of respondents willing to consider these destinations to reach by night train.



5,409
respondents

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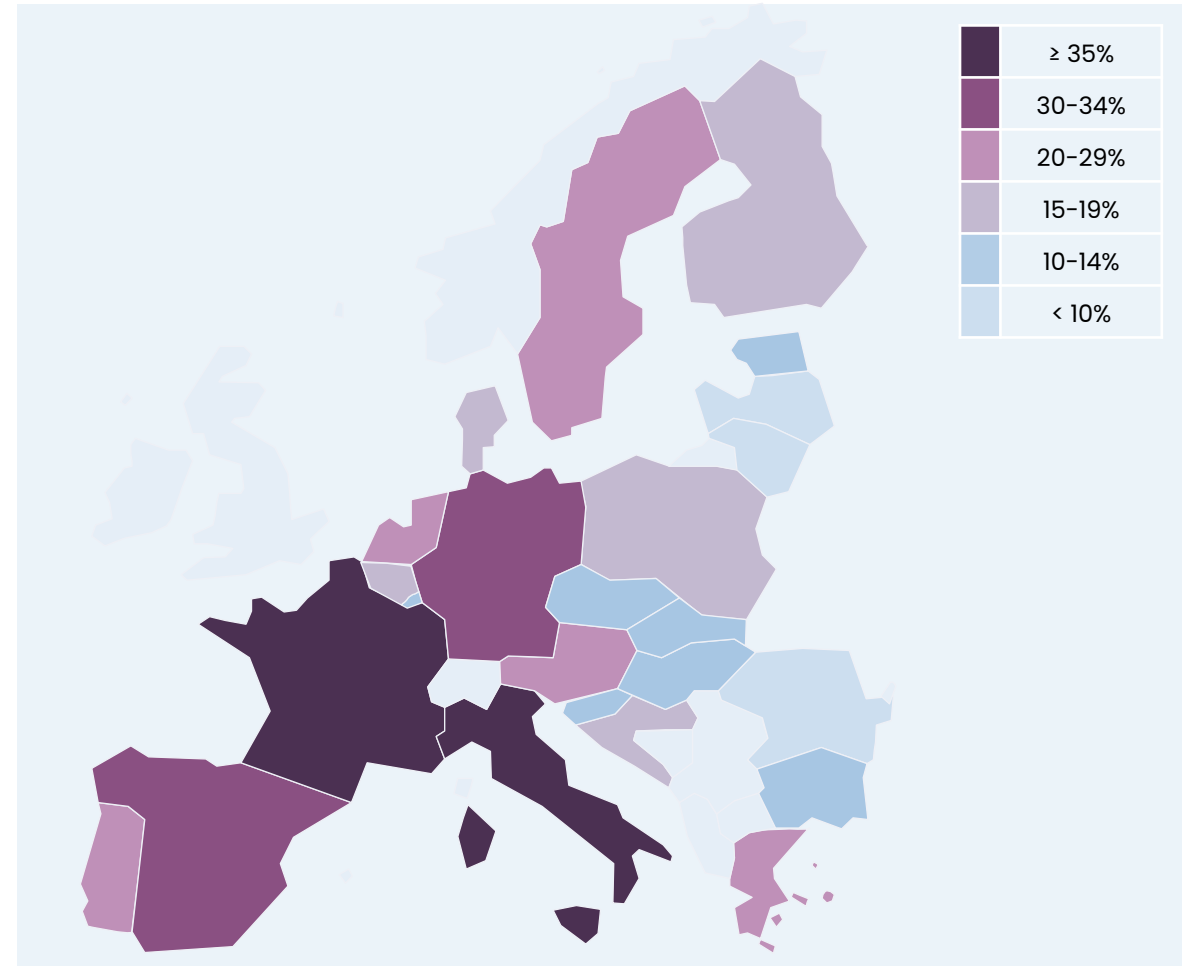
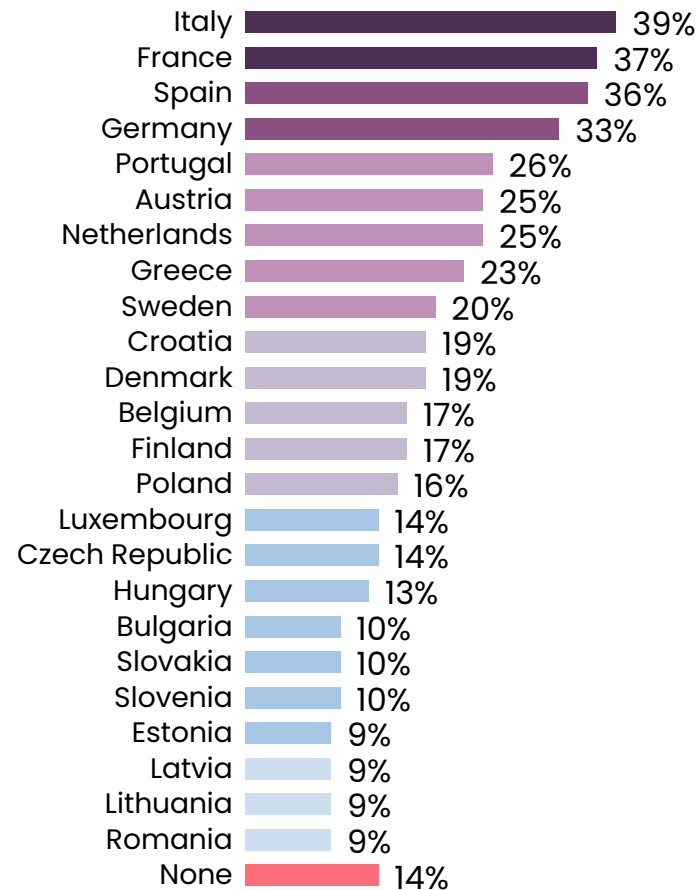
Mediterranean and Central European countries dominate preferences for night train travel.



5,409
respondents

Q. If night trains were available from your country to other European countries, which destinations would you consider travelling to use this mode of transport?

The most attractive destinations





Choice of destinations by country that reflect regional affinities.



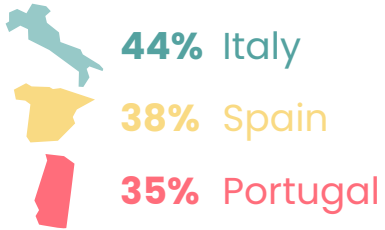
5,409
respondents

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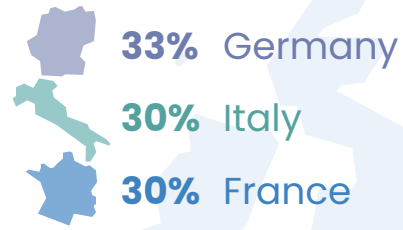
The Top3 destination per zone



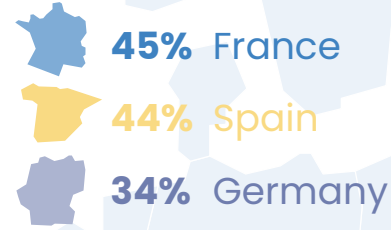
For the French



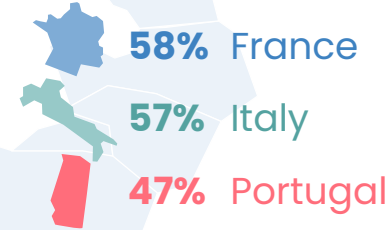
For the Germans



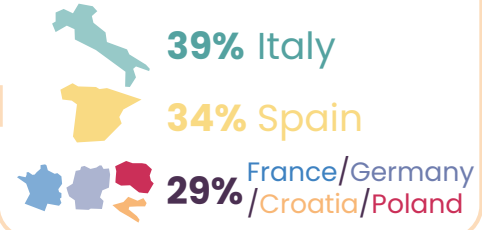
For the Italians



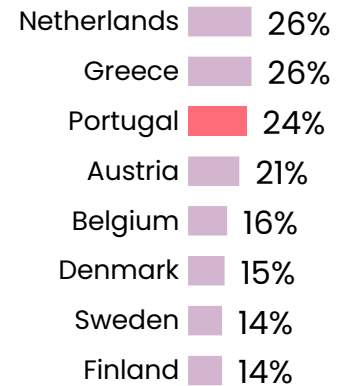
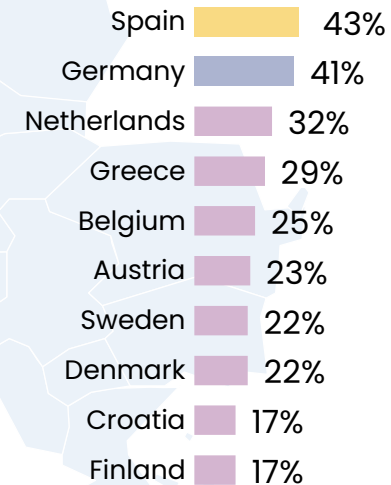
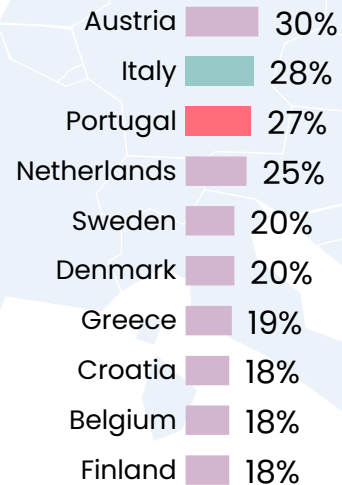
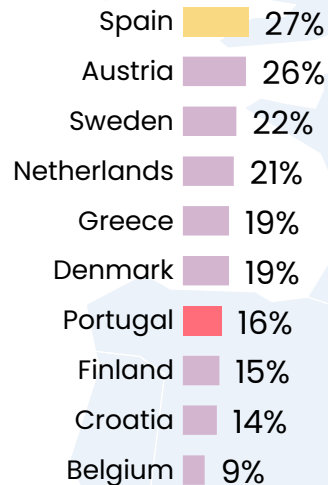
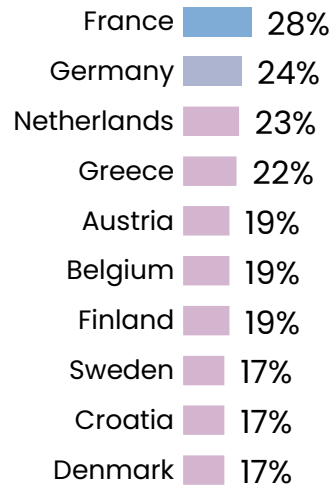
For the Spanish



For the Poles



The other destinations





#3

The night train is positioning itself as a strong competitor to other modes of transport

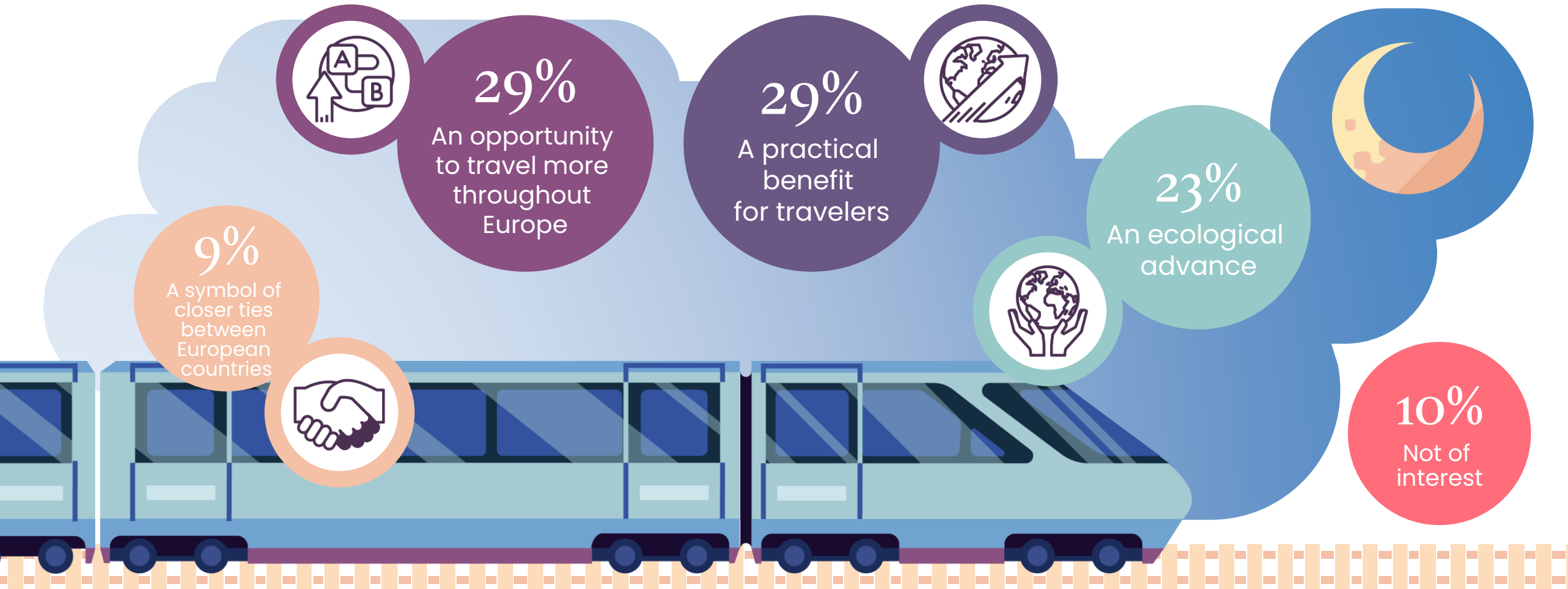


9 out of 10 respondents see an interest in the development of the European night train, revealing a thirst to travel around Europe, in a different and more ecological way.

Q. In your opinion, the development of night train services in Europe would primarily be...



5,409
respondents



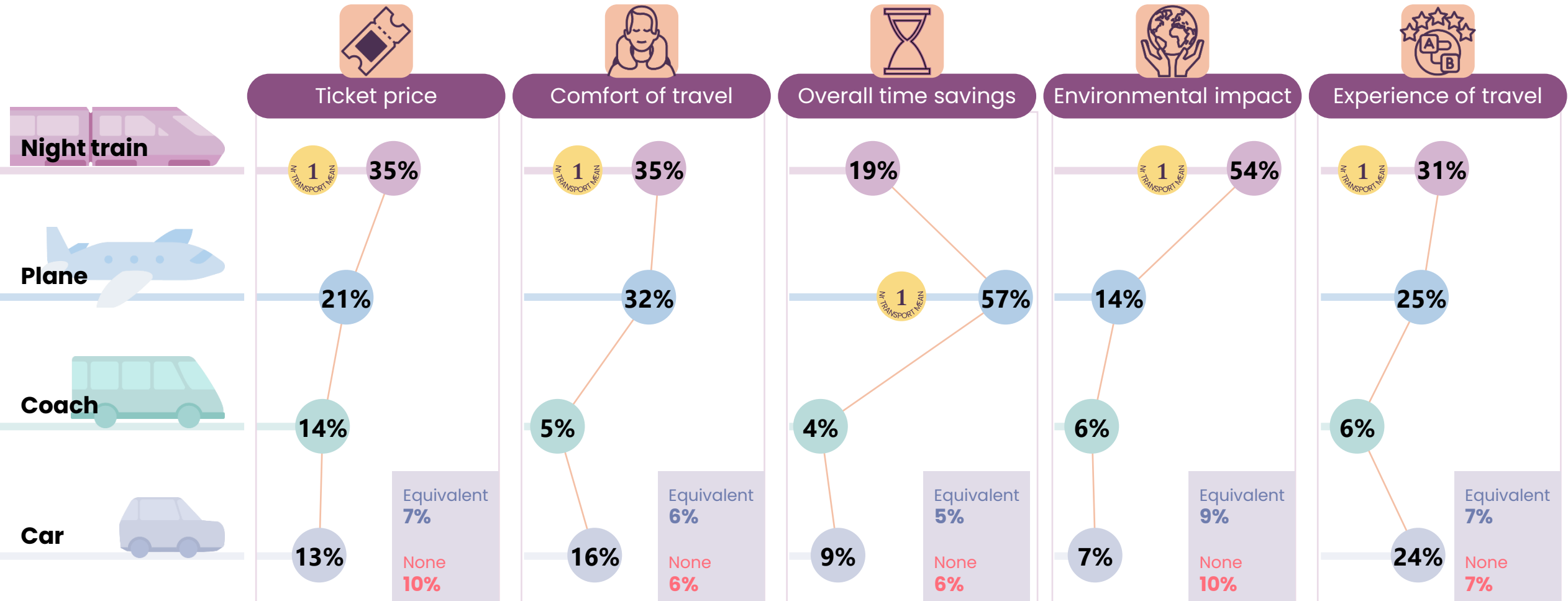


Night trains are seen as the most ecological way to travel by far and is also positioned first in comfort of travel experience. The European also perceive Night trains as competitive in terms of price...



5,409 respondents

Q. When comparing night trains, coaches, planes and cars for your trips in Europe, which do you find **most attractive** in terms of each of the following aspects?





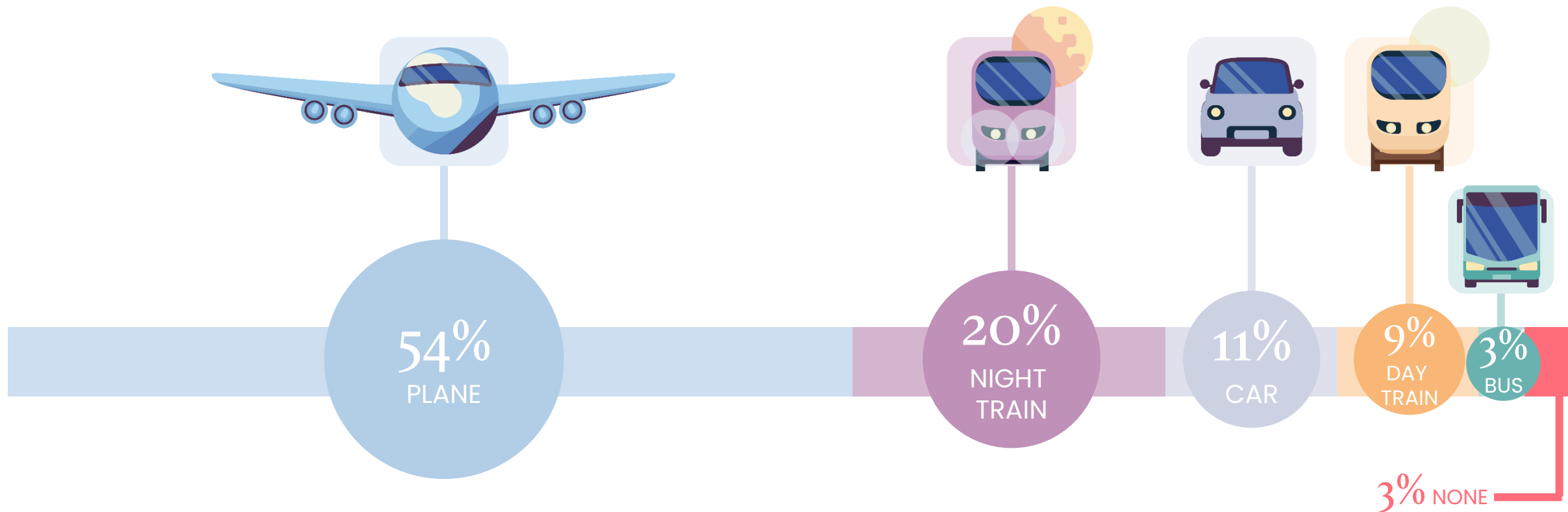
For very long distance, the plane remains dominant, but the night train attracts one in five travelers, twice as many as the day train.

Q. If tomorrow you had to choose a mode of transport from the following list for an international trip in Europe of more than 2,000 km, which would you tend to choose?



5,409
respondents

The favorite transport mean for long distance trips in Europe





#3

Among European citizens,
Polish and Germans are those
who use the most night trains

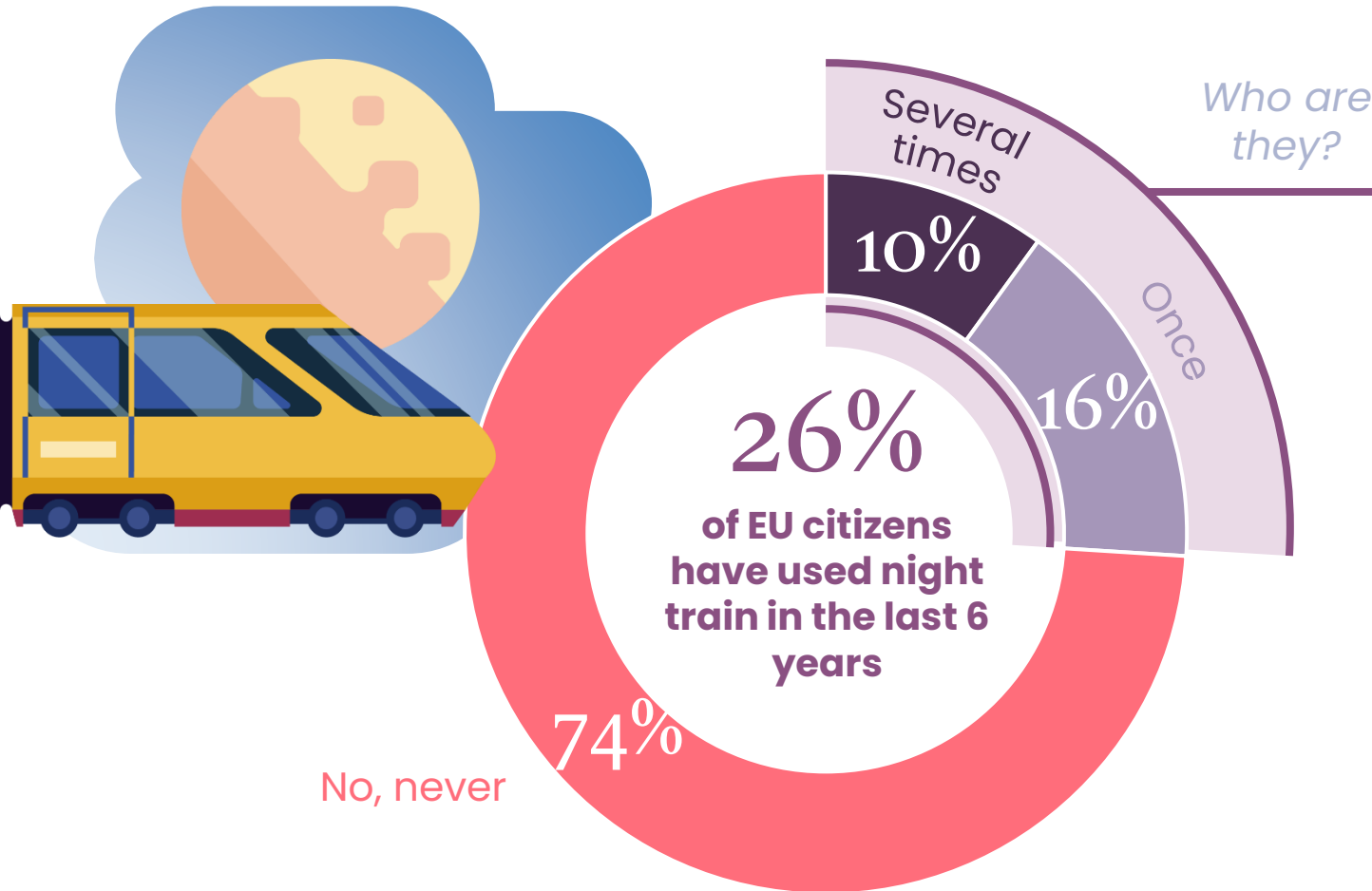


Within the past 6 years, one in four Europeans has ever travelled by night train: a practice which is more widespread among young, urban, male people who could be the pioneers of the revival of night trains in Europe.

Q. Have you travelled in Europe by night train in the last six years?



5,409
respondents



More users among...

♂ Men: 30%



18-34 yo: 48%



35-44 yo: 33%



Living in large cities: 33%

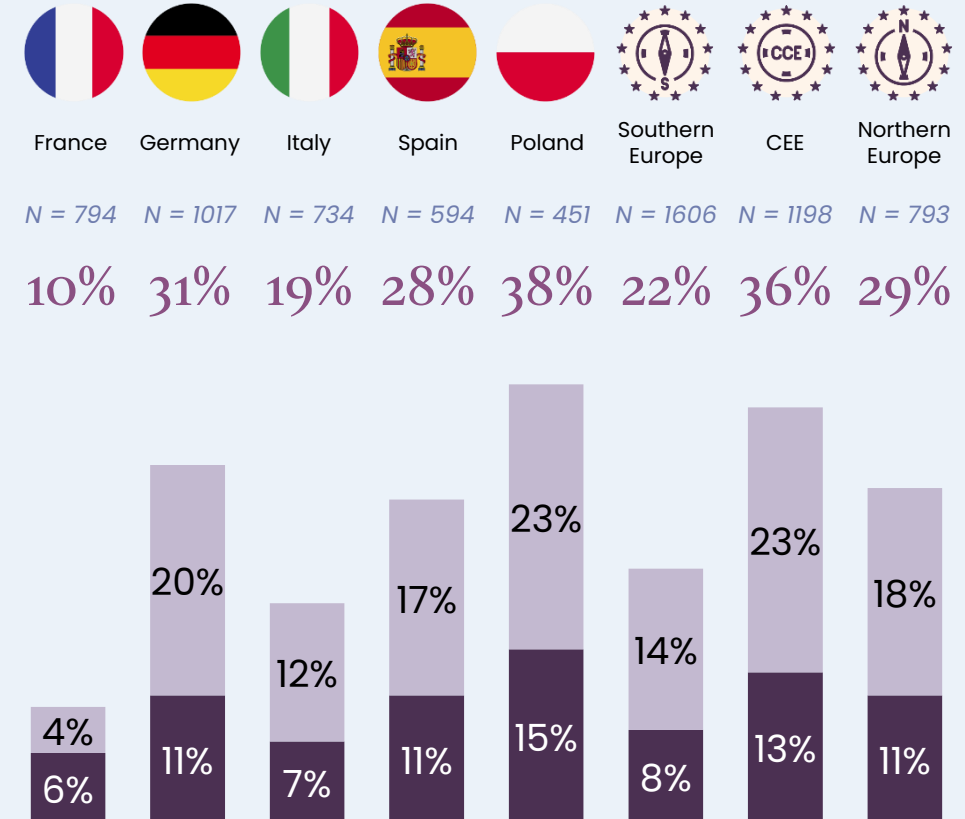
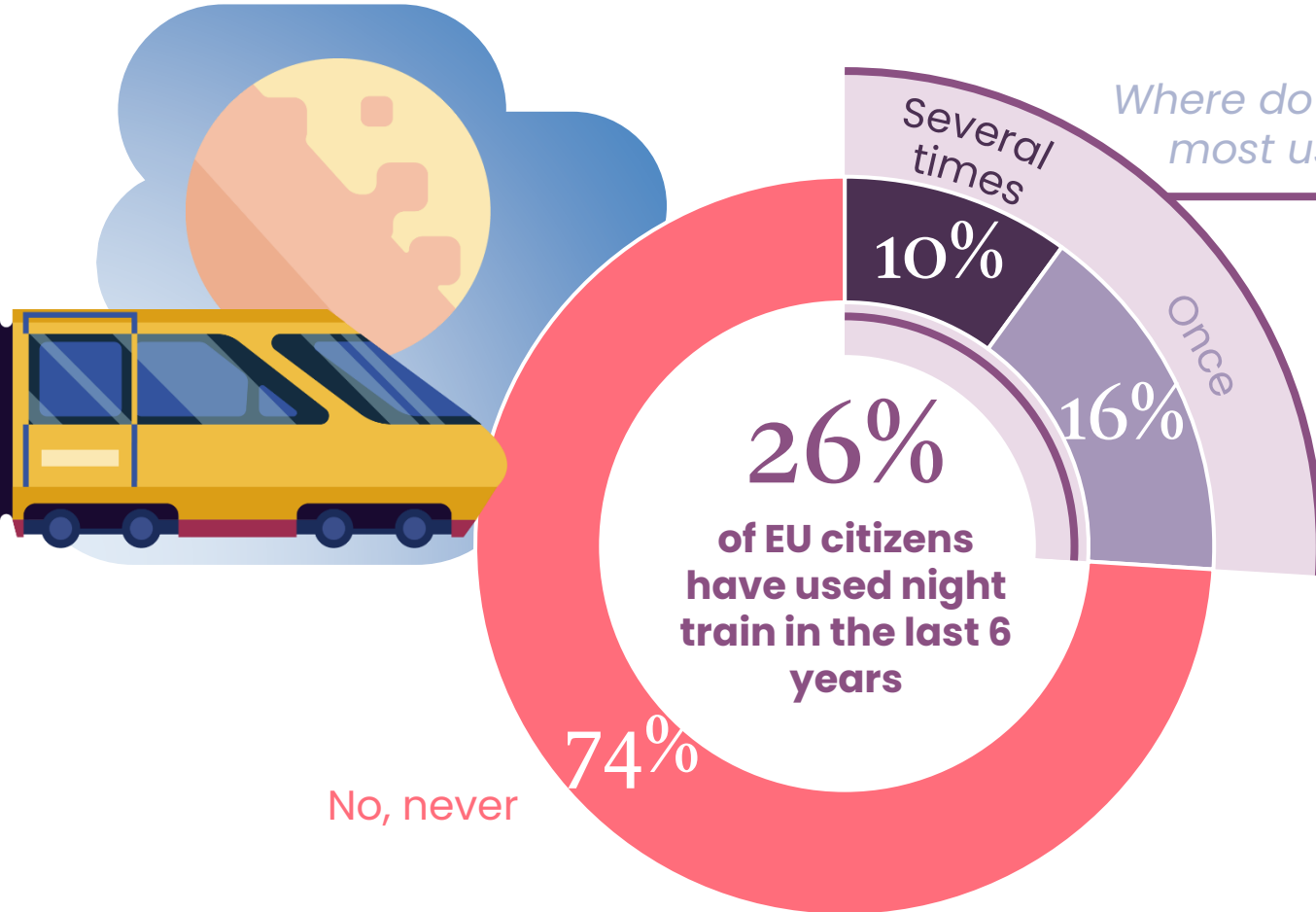


Poland, Germany and Spain are leading the way in terms of usage: three key markets that are driving the dynamics of the night train revival in Europe, while the others remain to be conquered.

Q. Have you travelled in Europe by night train in the last six years?



5,409
respondents





Synthesis

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” Conclusion

- The development of night trains represents **a promising future** for citizens in Europe, **meeting their mobility needs** while ensuring the use of **the lower-carbon mode of transport**.
- These findings highlight **the strong potential** of this sector, **widely supported by Europeans** and, given the investments required for its development, call for **a coordinated European approach** among the various states and stakeholders in the rail market **to put this future-oriented network on track**.



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Fondé en 2000 sur cette idée radicalement innovante pour l'époque, OpinionWay a été précurseur dans le renouvellement des pratiques de la profession des études marketing et d'opinion.

Forte d'une croissance continue depuis sa création, l'entreprise n'a eu de cesse de s'ouvrir vers de nouveaux horizons pour mieux adresser toutes les problématiques marketing et sociétales, en intégrant à ses méthodologies le Social Média Intelligence, l'exploitation de la smart data, les dynamiques créatives de co-construction, les approches communautaires et le storytelling.

Aujourd'hui OpinionWay poursuit sa dynamique de croissance en s'implantant géographiquement sur des zones à fort potentiel que sont l'Europe de l'Est et l'Afrique.

Enable today, shape tomorrow

C'est la mission qui anime les collaborateurs d'OpinionWay et qui fonde la relation qu'ils tissent avec leurs clients.

Le plaisir ressenti à apporter les réponses aux questions qu'ils se posent, à réduire l'incertitude sur les décisions à prendre, à tracker les insights pertinents et à co-construire les solutions d'avenir, nourrit tous les projets sur lesquels ils interviennent.

Cet enthousiasme associé à un véritable goût pour l'innovation et la transmission expliquent que nos clients expriment une haute satisfaction après chaque collaboration – 8,9/10, et un fort taux de recommandation – 3,88/4.

Le plaisir, l'engagement et la stimulation intellectuelle sont les trois mantras de nos interventions.

Restons *connectés* !



Recevez chaque semaine nos derniers résultats d'études dans votre boîte mail en vous abonnant à notre newsletter !

Je m'abonne

Votre contact OpinionWay

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ESOMAR²⁵
Corporate

