

# Consumer Monitor 2025: EU drivers' view on electric cars

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# **Consumer monitor 2025: EU drivers' view on electric cars**

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## Executive summary

The European Alternative Fuel Observatory (EAFO) Consumer Monitor 2025 provides an EU-27 perspective of how car drivers perceive battery electric vehicles (BEVs), how ready they are to adopt them, and what still blocks mass uptake. The analysis is based on an online panel survey conducted in October 2025 across all EU-27 Member States among more than 3,000 respondents holding a driving licence. The report connects attitudes to practical feasibility by analysing a funnel from general perception, personal compatibility and intention and timing of purchase.

A consistent message throughout the report is that electrification is progressing, but unevenly across countries and socially across groups. Plug-in vehicle users (BEVs and Plug-in Hybrid Electric Vehicle (PHEVs)) are disproportionately higher-income and higher-educated, more often in housing and parking situations that enable private charging (detached homes, owner-occupation, private parking), and more frequently embedded in broader “clean energy” households (e.g., solar panels, heat pumps, home batteries). On the other hand, households living in apartments and drivers relying on on-street parking are structurally disadvantaged in switching, even if their attitudes are not negative.

Across the EU-27, perceptions of BEVs are generally more neutral than polarised: many drivers are not opposed but not yet convinced that a BEV fits their daily reality. In the findings, personal compatibility seems to be the key to conversion: positive sentiment becomes near-term intention-to-purchase mainly when drivers feel a BEV is practically feasible for them. The most frequently perceived advantage remains climate benefit (no tailpipe CO<sub>2</sub>), while “driving characteristics” has become the second most important benefit. On the downside, high purchase price remains the dominant barrier, with driving range now ranking second in 2025, while charging concerns (private/public availability) have decreased in importance compared with earlier waves.

Next-car preferences remain mixed: internal combustion engine vehicles (ICEVs) still account for a substantial share, while hybrids continue to act as a major bridge technology; BEVs represent a smaller share of 14%. Many respondents considering a BEV state to intend to purchase in the near term (mostly within 0–3 years).

Affordability remains central: willingness-to-pay suggests many consumers expect BEVs in a budget range comparable to ICEVs - with a median price around €20 000 -, while a notable segment would only consider very low prices, underlining the importance of model availability, the used-BEV market and targeted support. At the same time, the expected driving range is high (commonly 400–600 km, and often above 600 km), which may not align with lower-priced models and contributes to deferred purchase intentions.

The findings point to an information gap that may reduce policy effectiveness: knowledge of incentives (including tax advantages) is limited. Nonetheless, financial incentives - particularly purchase subsidies - are perceived as strong potential triggers, suggesting scope to increase impact through clearer, simpler communication.

This report also includes a cross-country analysis of seven large-market countries, i.e. Germany, France, Italy, Spain, Poland, the Netherlands and Romania. Familiarity varies across the countries, but most drivers sit in the middle. Attitudes are broadly positive, but intention profiles differ.

The policy and industry implications of this report include a stronger focus on improving everyday feasibility, affordability and consumer confidence to convert neutral attitudes into near-term uptake, prioritising convenient charging access near the place of residence - especially for households without private parking -, alongside industry propositions addressing the affordability and market offerings that strengthen total cost predictability, supporting second-hand market confidence and residual values, communicating real-world driving range transparently, and integrating incentive information into the customer journey.

# 1. Introduction

This Consumer Monitor report opens by setting out the purpose, scope and approach. It then characterizes today's European drivers to provide the context of the results, examines how perceptions of electric cars are evolving, and assesses market readiness by looking at drivers' attitudes and intentions. Next, different trends are discussed by zooming in on seven large markets, before concluding with the key messages and implications for policy and industry.

## 1.1. Purpose and scope

The European Green Deal aims for a 90% reduction of transport-related greenhouse gas emissions by 2050 (compared to 1990), and an important interim goal is 90% reduction of CO<sub>2</sub> emissions for new cars by 2035. Different policies are in place to achieve this goal, including standards on CO<sub>2</sub> vehicle emissions, public procurement rules, and the Alternative Fuels Infrastructure Regulation (AFIR)<sup>1, 2, 3</sup>. Nevertheless, in 2023, the transport sector was responsible for around a third of the EU's total CO<sub>2</sub> emissions, 60% of which were emitted by passenger cars<sup>4</sup>. The passenger car is still the main transport mode and has continued to increase its share since the year 2000<sup>5</sup>. Replacing existing fleets with zero-emission vehicles is one of the key measures identified for this purpose. Important efforts have been made to promote electric cars, and therefore, identifying the main hurdles and needs of (potential) battery electric drivers can support the design and implementation of tailored strategies, policies and solutions to stimulate the demand for this type of vehicle.

In the previous EAFO Consumer Monitor reports, three main barriers have been identified regarding the mass uptake of passenger battery electric vehicles: purchase price, driving range, and the availability of recharging infrastructure. There have been significant advances: battery costs have dropped significantly in the last decade, vehicle range has increased from between 100 and 150 km to ranges of up to 400 km or more, and the recharging infrastructure network is expanding. In 2025, 17.4% of the newly registered vehicles were zero-emission vehicle in EU-27<sup>6</sup>. Nevertheless, battery electric vehicles and plug-in hybrid electric vehicles represent 3.75% (2024) of the total passenger cars fleet in the

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<sup>1</sup> [https://eur-lex.europa.eu/resource.html?uri=cellar:5e601657-3b06-11eb-b27b-01aa75ed71a1.0001.02/DOC\\_1&format=PDF](https://eur-lex.europa.eu/resource.html?uri=cellar:5e601657-3b06-11eb-b27b-01aa75ed71a1.0001.02/DOC_1&format=PDF)

<sup>2</sup> <https://eur-lex.europa.eu/eli/dir/2019/1161/oj>

<sup>3</sup> <https://eur-lex.europa.eu/eli/reg/2023/1804/oj>

<sup>4</sup> [European Commission: Directorate-General for Mobility and Transport, EU transport in figures – Statistical pocketbook 2025, 2025, https://data.europa.eu/doi/10.2832/2584130](https://data.europa.eu/doi/10.2832/2584130)

<sup>5</sup> <https://www.transportenvironment.org/topics/cars>

<sup>6</sup> <https://alternative-fuels-observatory.ec.europa.eu/transport-mode/road/european-union-eu27/vehicles-and-fleet>

EU, and the recharging infrastructure coverage – while overall drastically growing, often keeping pace (or even outpacing) EV uptake – is still uneven between Member States and can still be locally constrained within cities<sup>7891011</sup>.

To provide insight in user attitudes, expectations and barriers with respect to zero-emission car adoption, the EAFO Consumer Monitor surveys the drivers' population of the EU since 2022 with the aim of identifying the barriers, enablers, and policy levers that can accelerate inclusive zero-emission vehicle uptake.

This report highlights the main findings of the 2025 EAFO Consumer Monitor survey and presents the results for the EU-27 countries: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden.

## 1.2. Methodology

The European Alternative Fuels Observatory (EAFO) supports the adoption of alternative fuels in EU transport. It provides key information for the development of relevant strategies and policies, by providing information on the evolution of alternative fuel vehicles and recharging/refuelling infrastructure at the EU level and per country. The EAFO also includes a dedicated section for policymakers and consumers, addressing a wide range of stakeholders including different

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<sup>7</sup> Arslangulova, B., & Galanakis, K. (2024). The accessibility of public electric vehicle (EV) charging infrastructure: Evidence from the cities of Nottingham and Frankfurt. *IET Intelligent Transport Systems* 18(S1), 3058-3068. <https://doi.org/10.1049/tr2.12564>

<sup>8</sup> Martins, H., Henriques, C. O., Figueira, J.R., Silva, C.S., & Costa, A.S. (2023). Assessing policy interventions to stimulate the transition of electric vehicle technology in the European Union. *Socio-Economic Planning Sciences*, 87, 101505. <https://doi.org/10.1016/j.seps.2022101505>

<sup>9</sup> Otero-Romero, T., Castillo, C., Calero-Jiménez, J.M., Rollón, B.M., & Alvarez-Palau, E.J. (2025). Are we ready to transition towards e-mobility? An analysis of electric vehicle public charging infrastructure in Barcelona. *Case Studies on Transport Policy*, 21, 101519. <https://doi.org/10.1016/j.cstp.2025.101519>

<sup>10</sup> Ranjgar, B., Miraftabzadeh, S. M., Niccoli, A., & Longo, M. (2024). Electric Vehicles Charging Stations Service Area Assessment Using Spatial Analysis. *2024 IEEE International Conference on Environment and Electrical Engineering and 2024 IEEE Industrial and Commercial Power Systems Europe (EEEIC / I&CPS Europe)*, 1-4. <https://doi.org/10.1109/EEEIC/ICPSEurope61470.2024.10751406>

<sup>11</sup> Su, R. Cui, H., Zhang, J., Peng, X., & Kang, Z. (2025). *Global electric vehicle charging infrastructure market monitor (2024)* (p. 24). ICCT. [https://theicct.org/wp-content/uploads/2025/09/ID-462-%E2%80%93EV-Charging-Monitor\\_research\\_final-1-1.pdf](https://theicct.org/wp-content/uploads/2025/09/ID-462-%E2%80%93EV-Charging-Monitor_research_final-1-1.pdf)

government levels, vehicle manufacturers, other e-mobility industry companies, and automobile organisations, etc.

As part of the EAFO consumer section<sup>12</sup>, and for the fourth time, a survey was launched in October 2025 – this time in all EU-27 countries – to better understand consumers' intentions to adopt electric vehicles (EVs), their mobility behaviour, and the challenges they perceive or encounter. The EAFO Consumer Monitor focuses on electric road transport, in particular passenger vehicles. Detailed information on the survey methodology is available in Annex I.

The EAFO Consumer Monitor survey consisted of an online survey conducted by a closed EU-27 country panel to have a representation of the general car drivers' population, hence the inclusion criterion for respondents was the possession of a driver's license.

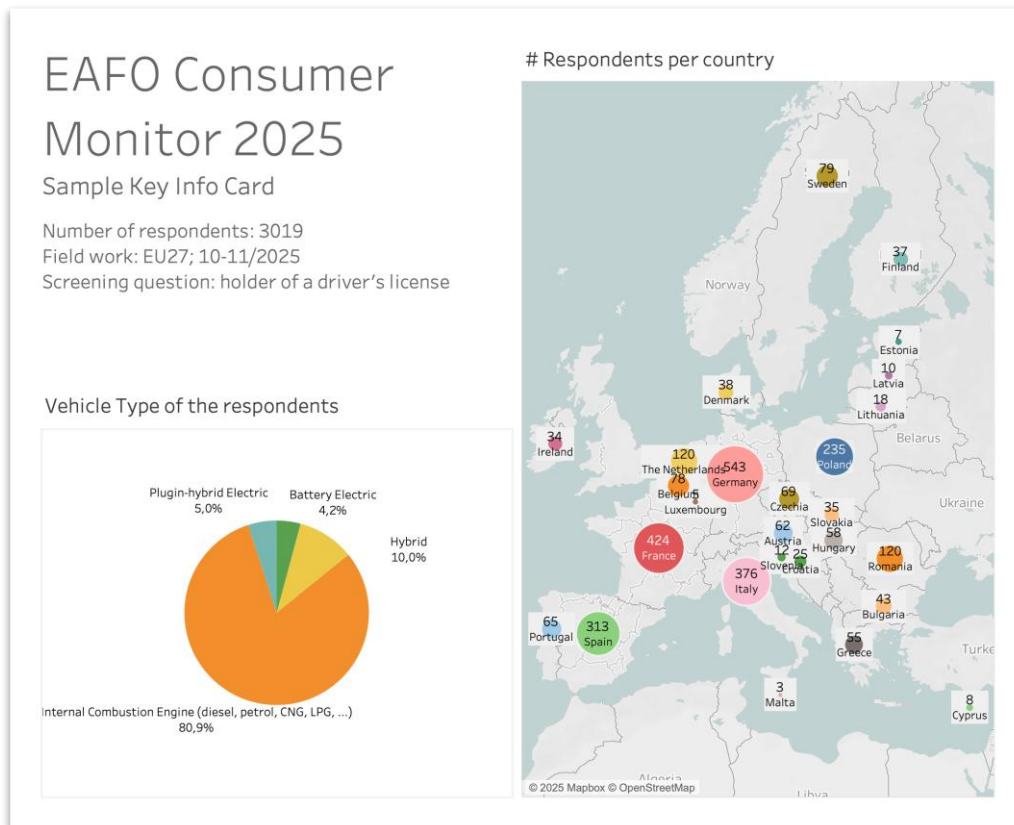
The total number of valid responses is 3,019 respondents, of which 2,310 were filled out by Internal Combustion Engine Vehicles (ICEVs) drivers, 285 by Hybrid Electric Vehicle (HEV) drivers, 142 by Plug-in Hybrid Electric Vehicle (PHEV) drivers and 119 by Battery Electric Vehicle (BEV) drivers. The remainder of the respondents indicated not knowing (3) their drivetrain, having another type of drivetrain (8) or not owning a car (152). In the remainder of this text, we consider the drivers of BEVs and PHEVs as EV-drivers since these vehicles have a plug to charge; drivers of Internal Combustion Engine (ICE) and HEVs are considered non-EV drivers. Note that sample sizes vary per country and insights based on small sample sizes should be interpreted with caution, as estimates may be less robust and subject to higher uncertainty; this is indicated with an \* in the remainder of the report. For clarity and indicated with \*\*, response options with very few observations (e.g., "other" or "don't know") are occasionally omitted from charts or tables. A selection of the charts and tables from this report are available on the website <https://mobi.research.vub.be/eafo> for interactive consultation.

### 1.3. What is different in Consumer Monitor Wave 2025

In the revised approach of 2025, it was decided to have an EU-27 representative sample considering the driving population of all EU-27 countries rather a selection of countries as was the case in the waves of 2022-2024. The analysis focuses on the general questions, excluding BEV-specific constructs as used in earlier waves, to provide a market-wide perspective across the EU-27. Figure 1 shows the sample key information and number of respondents per country.

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<sup>12</sup> <https://alternative-fuels-observatory.ec.europa.eu/consumer-portal>



**Figure 1: General overview of EU-27 respondents (\*)(\*\*)**

## 1.4. How to interpret Consumer Monitor 2022–2025 trend data

Through this report, the findings from the EU-27 are compared with results from the EAFO Consumer Monitor 2022 and 2023 waves. In 2022, 10 countries were surveyed via panels, resulting in a total of 16,664 respondents: Austria, Belgium, Denmark, France, Germany, Hungary, Italy, Slovenia, Spain and The Netherlands. In 2023, 12 countries were surveyed via panels totalling 19,080 respondents spread over Belgium, Denmark, France, Germany, Hungary, Italy, Lithuania, Luxembourg, Slovenia, Spain, Sweden and the Netherlands. For these two surveys, added effort was made to include a proportionally large sample of BEV drivers.

Findings on changes over time should be interpreted as descriptive trends. Each survey captures similar broad themes: attitudes towards electric driving, perceived compatibility, intended timing of the next car purchase and preferred drivetrain. Sample sizes, weighting and in some cases answer options differ slightly between years. Especially the 2025 wave is based on a smaller sample and a partly updated questionnaire. It is comparable at the level of the main constructs, but not always at item level. Changes over the years indicate how views and intentions evolve in general.

## 2. Who Are Europe's Drivers Today? The Consumer Landscape

It is essential to understand who Europe's drivers are to interpret the results in this report: awareness, attitudes and purchase intentions towards electric vehicles are not evenly distributed across the population. Socio-demographic factors such as age, income, education, and housing shape both the practical feasibility of switching to an EV and the perceived attractiveness of EVs. This section provides the respondents' context needed to correctly understand the findings in this report. Sections 2.1 to 2.4 describe the respondents from the 2025 survey; section 2.5 presents a socio-demographic comparison across the different EAFO Consumer Monitor waves.

### 2.1. Socio-demographic profile and vehicle type

Among the 3,019 respondents in 2025, the ratio of non-electric drivers (ICEV and HEV) to electric drivers (PHEV and BEV) is 9:1.

Electric driving is disproportionately adopted by higher-income households, with uptake increasing steadily across income brackets and remaining low among households with an income below €2 000 per month. Since income and education are generally correlated, a strong influence of education is also evident, with electric driving concentrated among respondents with tertiary and postgraduate education, while non-electric driving dominates among lower-education groups. Gender differences are present but limited, with men more frequently represented among BEV/PHEV users. Household composition is associated with vehicle type, as single adults and couples without children show higher electric driving shares than households with children. Families with children remain more reliant on ICEVs and HEVs. Overall, electric driving is concentrated among socio-economically advantaged groups.

	Vehicle Type (group)			
	Respondents		% of Total	
	BEV & PHEV	HEV & ICEV	BEV & PHEV	HEV & ICEV
Female	101	1.252	7,5%	92,5%
Male	159	1.340	10,6%	89,4%
Post-university education (PhD, Post-doc,...)	26	95	21,5%	78,5%
University education (Bachelor degree, Ma..)	129	992	11,5%	88,5%
Higher non-university education	59	599	9,0%	91,0%
Secondary education	44	851	4,9%	95,1%
Primary education	3	52	5,5%	94,5%
≥ 6000 €	45	152	22,8%	77,2%
4000-5999 €	85	469	15,3%	84,7%
2000-3999 €	101	1.175	7,9%	92,1%
800-1999 €	29	683	4,1%	95,9%
< 800 €	1	114	0,9%	99,1%
I live alone	31	479	6,1%	93,9%
Single parent with child(ren)	12	121	9,0%	91,0%
I live with family	11	225	4,7%	95,3%
I live with others: co-housing	3	28	9,7%	90,3%
Married or living together with child(ren)	132	929	12,4%	87,6%
Married or living together without children	72	802	8,2%	91,8%

**Table 1: Socio-demographics sorted by vehicle type (\*\*)**

## 2.2. Housing & parking situation relevant for charging

BEV/PHEV respondents are more often in partnered households and in housing types that facilitate private charging: they are more likely to live married or cohabiting and in detached houses, while HEV/ICEV respondents are more likely to live in apartments or studios and to live alone. This pattern suggests that, beyond preferences, housing conditions remain a key structural driver of electrification, reinforced by slightly higher owner-occupancy among BEV/PHEV respondents.

Original questions	Answers	Vehicle Type (group)	
		BEV & PHEV	HEV & ICEV
What is the ownership model of the accommodation you live in?	I live in an owner-occupied accommodation	205 78,5%	1.885 72,7%
	I live in a rental accommodation	52 19,9%	622 24,0%
What type of accommodation do you live in?	Detached house	129 49,4%	921 35,5%
	Semi-detached house	24 9,2%	195 7,5%
	Attached house	30 11,5%	244 9,4%
	Appartement/studio	77 29,5%	1.210 46,7%
Which description best suits your residential situation?	Married or living together with child(ren)	132 50,6%	929 35,8%
	Married or living together without children	72 27,6%	802 30,9%
	I live with family	11 4,2%	225 8,7%
	I live with others: co-housing	3 1,1%	28 1,1%
	Single parent with child(ren)	12 4,6%	121 4,7%
	I live alone	31 11,9%	479 18,5%

**Table 2: Housing of EU-27 respondents split by vehicle type (\*\*)**

Answers	Vehicle Type (group)			
	Respondents		%	
	BEV & PHEV	HEV & ICEV	BEV & PHEV	HEV & ICEV
Private parking on your own driveway or garage	178	1,433	68,2%	55,5%
Private parking spot in a shared garage or parking terrain	63	533	24,1%	20,7%
Designated public on-street parking spot	30	346	11,5%	13,4%
Private parking spot on the road	24	192	9,2%	7,4%
Non-designated public on-street parking spot	19	385	7,3%	14,9%
Public parking place in a public garage or parking terrain	14	104	5,4%	4,0%

**Table 3: Parking situation of EU-27 respondents split by vehicle type (\*\*)**

This housing advantage is mirrored in parking access: BEV/PHEV respondents more often have private parking (on their own property or in dedicated private spots), whereas HEV/ICEV respondents more often rely on public on-street parking, especially non-designated spaces. Taken together, the results reinforce that the “charging-ready” home environment (private dwelling plus private parking) acts as a key enabling condition for electrification. When asked how long their car is parked at certain locations, the majority of the time, parking occurs at home on a private parking space or on a driveway.

## 2.3. Use of renewable home energy technologies

Answers	Vehicle Type (group)			
	BEV & PHEV		HEV & ICEV	
	Respondents	%	Respondents	%
Solar panels	111	42,7%	468	18,1%
Heat pump	97	37,3%	442	17,1%
Home battery	52	20,0%	159	6,2%
Geothermal power system	22	8,5%	71	2,8%
I don't have a source of renewable energy	84	32,3%	1,724	66,8%
Grand Total	260	100,0%	2,579	100,0%

**Table 4: Renewable Energy Sources of EU-27 respondents split by vehicle type (\*\*)**

EV respondents are far more likely to be embedded in a broader “clean energy” household context than HEV/ICEV drivers. Nearly half report solar panels, and over a third have a heat pump, with home batteries also more common among BEV owners. Conversely, the absence of any renewable energy source is substantially higher among HEV/ICEV households than among BEV households. Across vehicle types, owner-occupiers are more likely than renters to report renewable home energy technologies, while renters more often report having neither. This pattern is visible within BEV/PHEV as well as HEV/ICEV households, suggesting that EV uptake often coincides with broader home energy investments. Overall, EV uptake appears to cluster with wider investments in residential electrification and self-generation, consistent with a segmentation in which early adopters combine vehicle electrification with home energy upgrades.

## 2.4. Mobility benefits

Among the 3,024 respondents, the majority reported receiving no mobility benefits. The most common benefit was a public transport subscription (20%), followed by a company fuel card (11.6%) and kilometre reimbursement (11.3%); a smaller share reported a company charging card (5.6%).

## 2.5. Key socio-demographic shifts 2022 → 2025

Between the three Consumer Monitor surveys (2022, 2023 & 2025), the achieved samples show some differences in socio-demographic composition. All three surveys used a comparable sampling approach, targeting respondents with a driving licence and applying gender-balance quotas. The main design difference is that in the earlier waves (2022, 2023) additional effort was made to recruit EV drivers, which may affect comparability for EV-related indicators. Therefore,

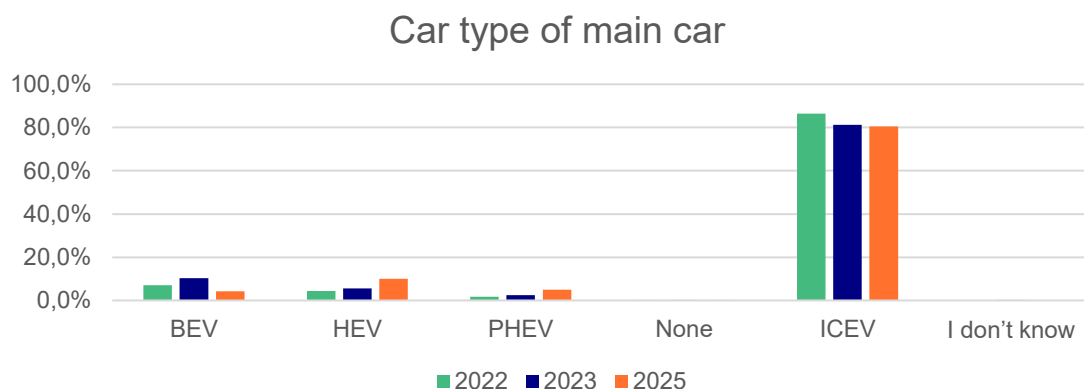
these comparisons should be interpreted cautiously. The most prominent differences in socio-demographics are the distribution across age categories, accommodation and parking, ownership of renewable energy devices, car ownership and mobility benefits.

In terms of age, 2022 and 2023 were similar, but in 2025 a larger share of respondents was 35-55 years old (46% vs 40% in 2023 and 38% in 2022), while the share below 35 decreased over time. The share of respondents with higher education rose from 32.5% (2022) to 41% (2023), and 43% (2025), while those with no or only primary education decreased. Income levels stayed fairly even distributed, with a slight increase in the €2 000-€3 999 category, and there were no notable changes in household composition.

For accommodation, more respondents live in apartments/studios over the years, while living in attached and detached houses decreased the most. Most still live in owner-occupied homes. Over time, access to a private parking space on a driveway or in a garage decreased, while private parking in shared spaces, non-designated on-street parking and private parking spots on the road increased.

Regarding renewable energy devices, the ranking of device types remained the same, but in 2025, a larger share of respondents had no devices. This may be linked to the higher proportion of BEV drivers in 2022 and 2023, who generally also had more renewable energy devices.

Car ownership is shifting toward fewer cars per household, with fewer people owning more than one car. The ICEV remains the dominant main car type but decreased from 87% in 2022 to 80.5% in 2025. HEVs and PHEVs show an upward trend, while BEVs decline slightly; however, this BEV trend should be interpreted cautiously because the 2022 and 2023 samples deliberately included more BEV drivers.



**Figure 2: Longitudinal view on car type of their main car ('22, '23 & '25)**

Finally, over time, a higher percentage of respondents report having mobility benefits. Most still have none, but fuel cards and charging cards are becoming more common, while the share receiving a 'kilometre allowance' has decreased.

### 3. Shifting Perceptions: How European Drivers Feel About Electric Cars

Having set the context about the European drivers in Section 2, this section turns to how European drivers perceive electric vehicles: how are BEVs currently viewed, with main benefits and drawbacks, and how have perceptions evolved since 2022.

#### 3.1. Familiarity with BEVs

Familiarity with BEVs varies widely across countries, revealing where electrification is already “mainstream” versus where it remains distant. In higher-exposure markets (most clearly Denmark, Ireland, Luxembourg, Germany and the Netherlands) the share who already own/lease a BEV or report high familiarity is relatively substantial, indicating more routine contact with EVs through personal use, peers, or public visibility. By contrast, several countries display large segments that are only “a bit familiar” or explicitly “not familiar,” most prominently Greece, Hungary, Austria and Cyprus, suggesting that for many consumers BEVs remain abstract and experience-based learning is limited. This uneven familiarity likely helps explain the cross-country attitude patterns: where first-hand exposure is higher, opinions appear more formed and supportive; where familiarity is low, neutrality and uncertainty are more likely to dominate.

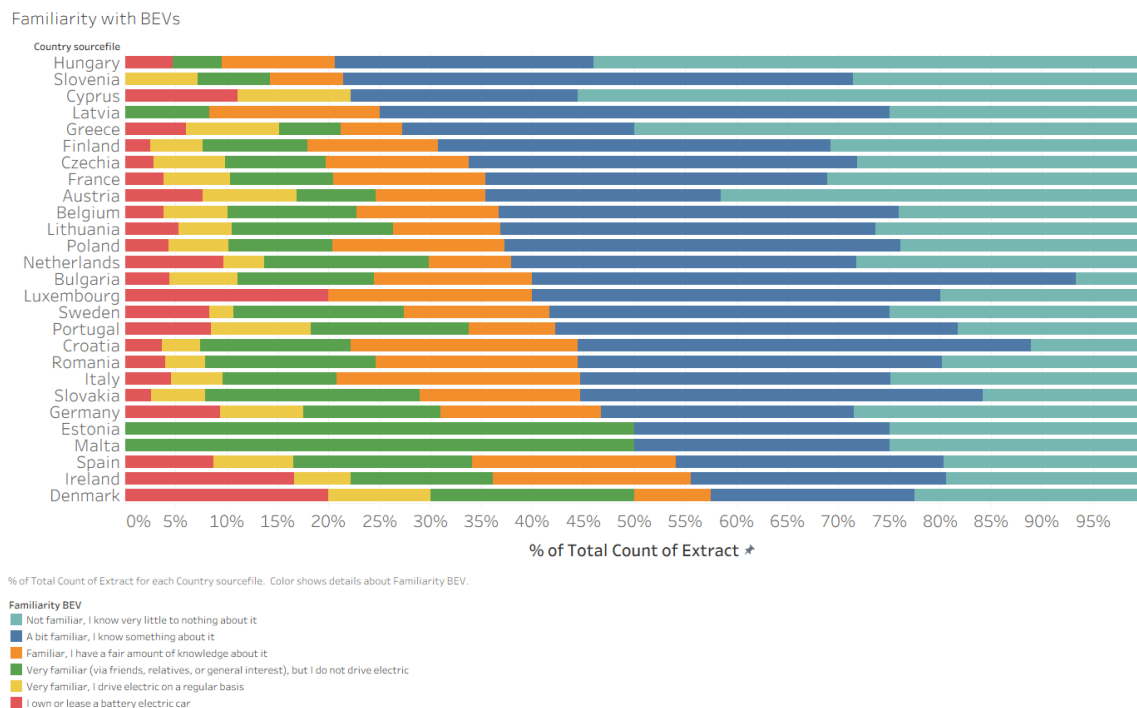
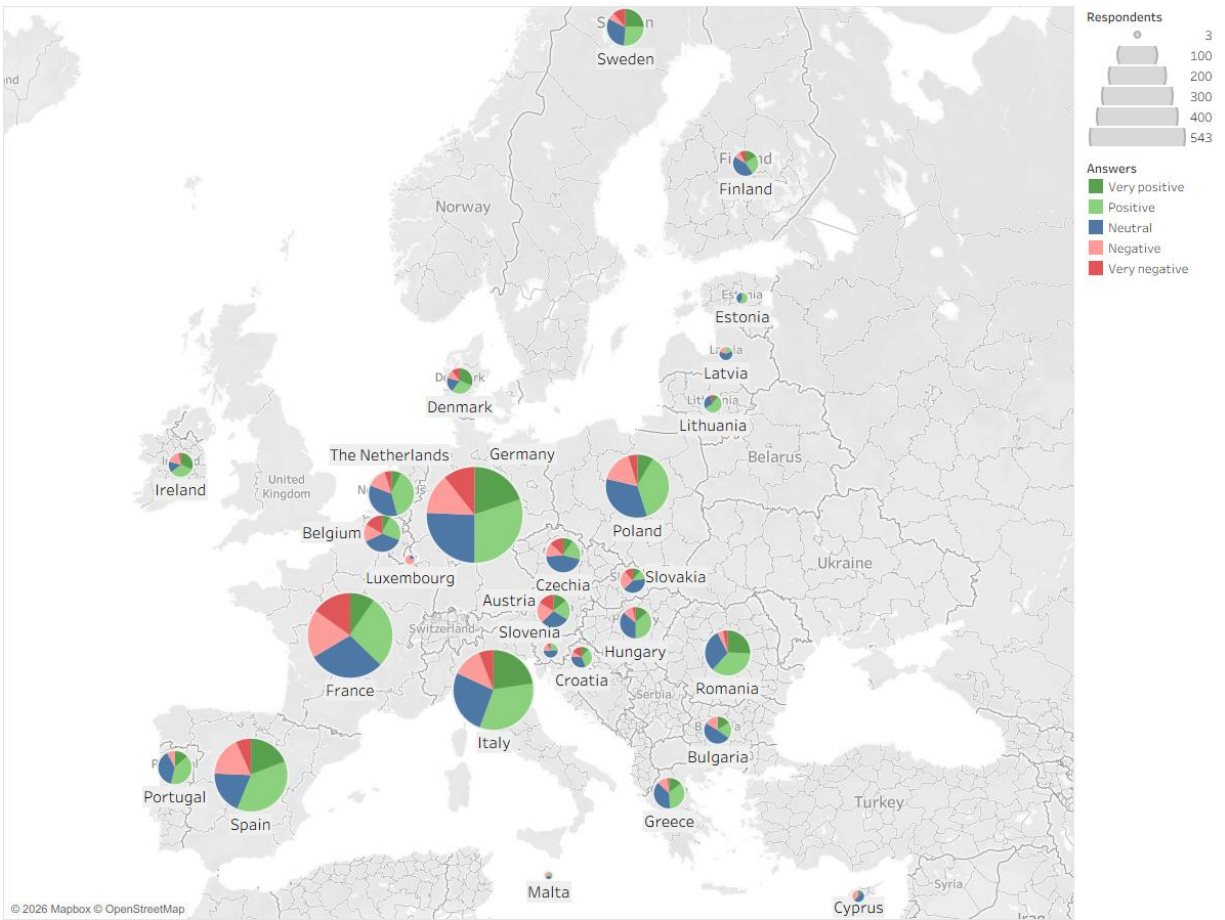


Figure 3: Familiarity with BEVs (\*)

## 3.2. General attitude towards BEVs

Map Country x Attitude



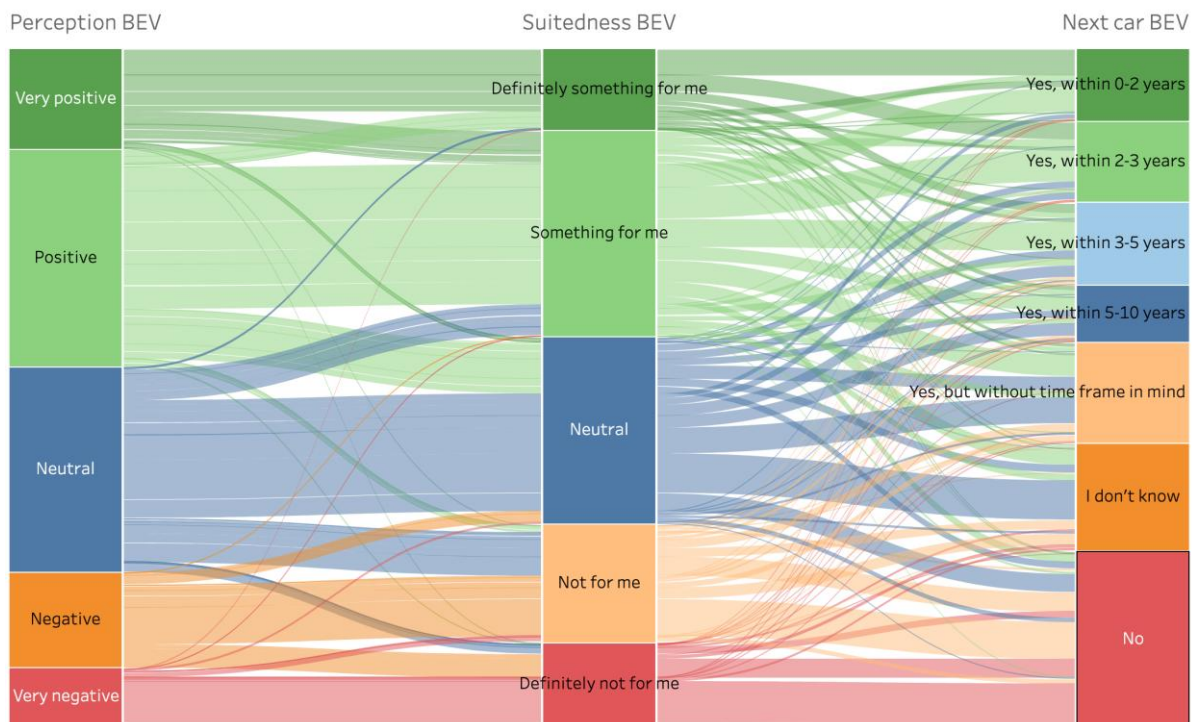
**Figure 4: General attitude towards BEVs (\*)**

Attitudes vary by country, but the dominant pattern is a large “movable middle”: in many markets, the modal response is neutral, suggesting uncertainty or low salience rather than entrenched opposition. (Note that for some countries, sample sizes are small – cfr. size of the pie diagram on the map in Figure 4 – and hence results are less robust.) The most supportive profiles appear in the Nordics, Spain, Romania and a few smaller markets (notably Denmark and Ireland), where positive sentiment clearly outweighs negativity, while several Western and Central European countries show a more polarised or sceptical distribution with sizable negative shares. Several Central and Eastern countries are characterized by especially high neutrality, indicating that perceptions are less formed, an important cue that information, experience, and local context may be decisive in shifting attitudes.

### 3.3. Personal compatibility: “Is a BEV something for me?”

Perceived personal compatibility with BEVs shows strong cross-country dispersion and, again, a large “undecided” segment in many markets. Denmark, Ireland and Germany stand out with comparatively higher shares saying an electric car is (definitely) “something for me,” suggesting that favourable context and exposure translate into self-relevance rather than abstract approval. Conversely, Austria and Slovakia show more outright rejection, while several countries (including Estonia, Greece and Hungary) are characterised by very high neutrality, implying that many respondents have not yet mapped BEVs onto their own needs and constraints. In analytical terms, this measure is a useful bridge between general attitudes and adoption intent: it captures where the debate is primarily about *fit* (infrastructure, housing/parking, affordability) versus where it is still about *formation of opinion* (low familiarity and high neutrality).

### 3.4. Attitude – Next purchase funnel

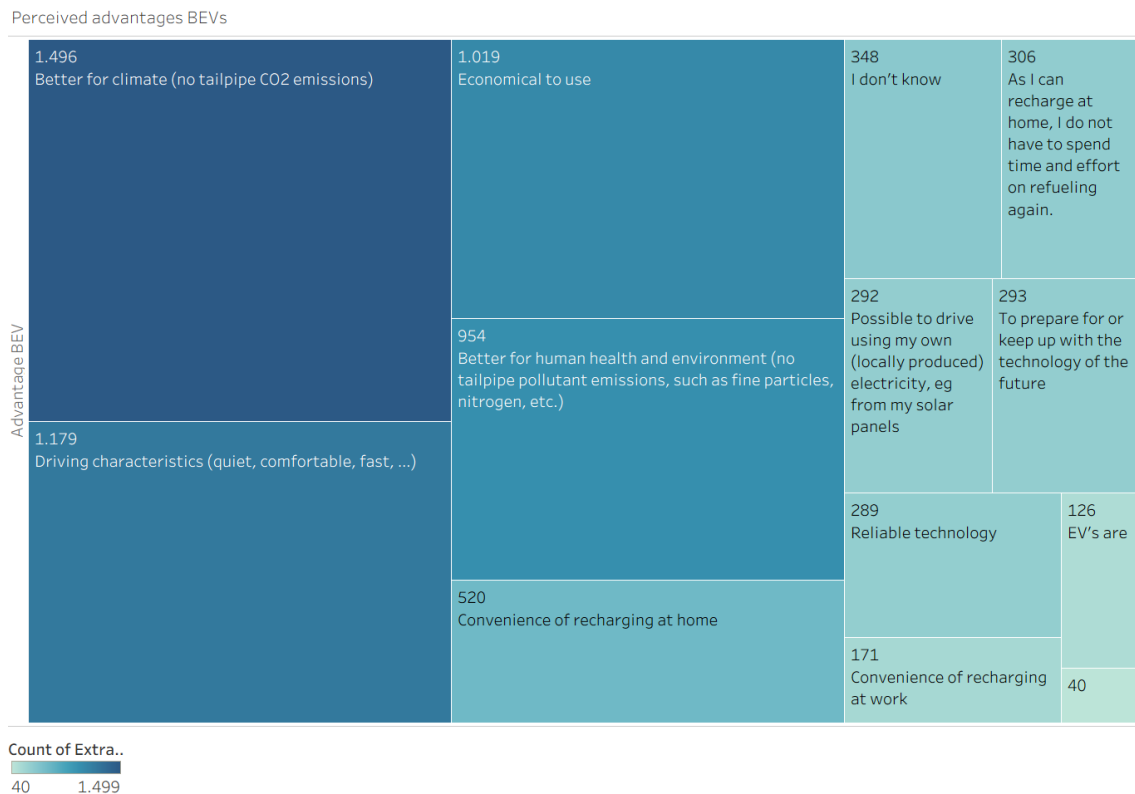


**Figure 5: Attitude - Next purchase funnel**

The funnel shows a clear stepwise narrowing from general perception to personal compatibility and then to purchase intention: respondents with very positive/positive attitudes flow disproportionately into the “(definitely) something for me” compatibility segment and are the main source of near-term purchase intentions, whereas negative/very negative perceptions concentrate in “not for

me/definitely not for me” and end predominantly in “no” intention. The largest volume runs through the middle, neutral attitudes feeding into neutral compatibility, which then disperses across longer horizons and “I don’t know,” indicating that uncertainty and perceived fit (rather than outright opposition) are the dominant frictions in moving people from favourable sentiment to actionable intent. In other words, compatibility acts as the key conversion gate: once people see an EV as “for me,” intentions shift forward in time; when they do not, the pathway largely terminates.

### 3.5. Perceived advantages and disadvantages



**Figure 6: Perceived advantages of BEVs (\*\*)**

Figure 6 shows that the most frequently cited advantage of BEVs is “Better for climate (no tailpipe CO2 emissions)”. This is followed by positive driving characteristics. Figure 7 shows the disadvantages of BEVs indicated by all respondents. The most frequently indicated disadvantage is the purchase price.

In second place is the driving range, and the disadvantages regarding charging are in third and fourth.

Perceived disadvantages BEVs

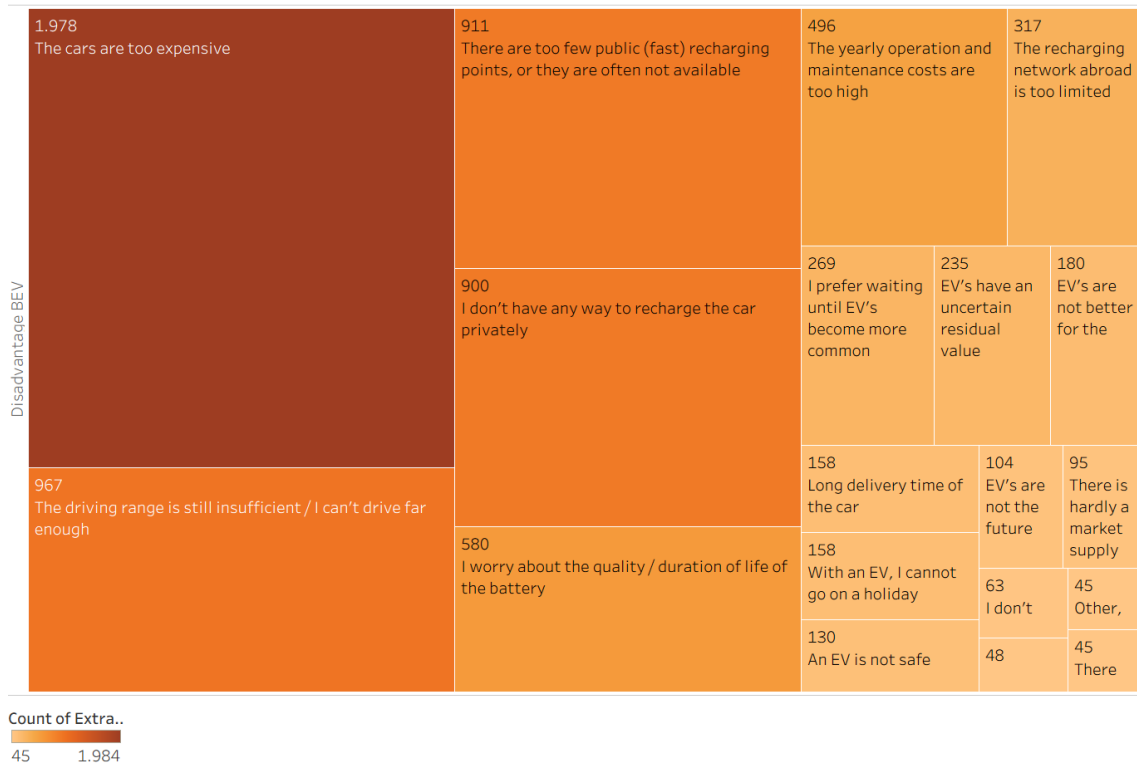
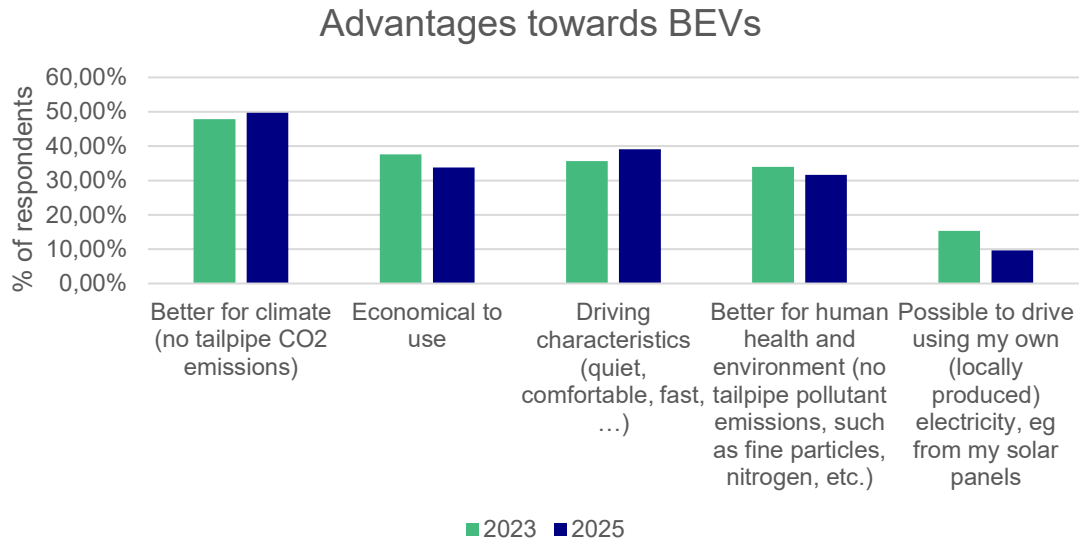


Figure 7: Perceived disadvantages of BEVs (\*\*)

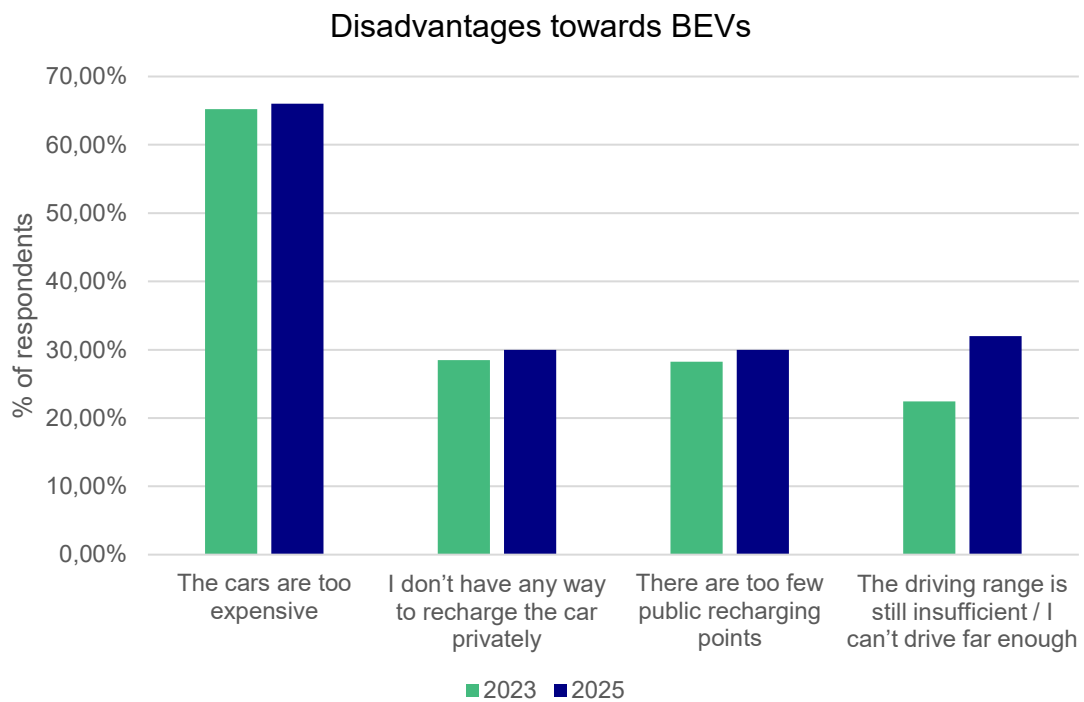
### 3.6. Attitude evolution 2022–2025

In terms of familiarity with BEVs, we can see over the years an improvement of familiarity. The share of respondents that is not familiar with BEVs drops from 37% in 2022 and 40% in 2023 to 27% in 2025. So BEVs are known by most people, but not universally. Respondents are increasingly neutral in their opinion on BEVs, with one-fifth remaining negative about BEVs. 30% is neutral about BEVs, 31% positive and 16% very positive towards BEVs. Compatibility perceptions stay broadly positive between 2022 and 2025, but they shift from strong enthusiasm towards more moderate 'something for me' and slightly higher 'not for me'. Concerning advantages, the top advantage remains better for climate (no tailpipe emissions), with driving characteristics climbing from spot four in 2022 to second place in 2025, pushing 'economical to use' from two years on second place to third. Because this was a multiple-response question, percentages represent the share of respondents selecting each option and do not sum to 100%.



**Figure 8: Advantages towards BEVs**

*'The cars are too expensive'* remains by far the biggest barrier in all surveys, with the driving range in second place in 2025, pushing *"I don't have any way to recharge the car privately"* and *"There are too few public (fast) recharging points, or they are often not available"* down the list as can be seen from Figure 9. Because this was a multiple-response question, percentages represent the share of respondents selecting each option and do not sum to 100%.



**Figure 9: Disadvantages towards BEVs**

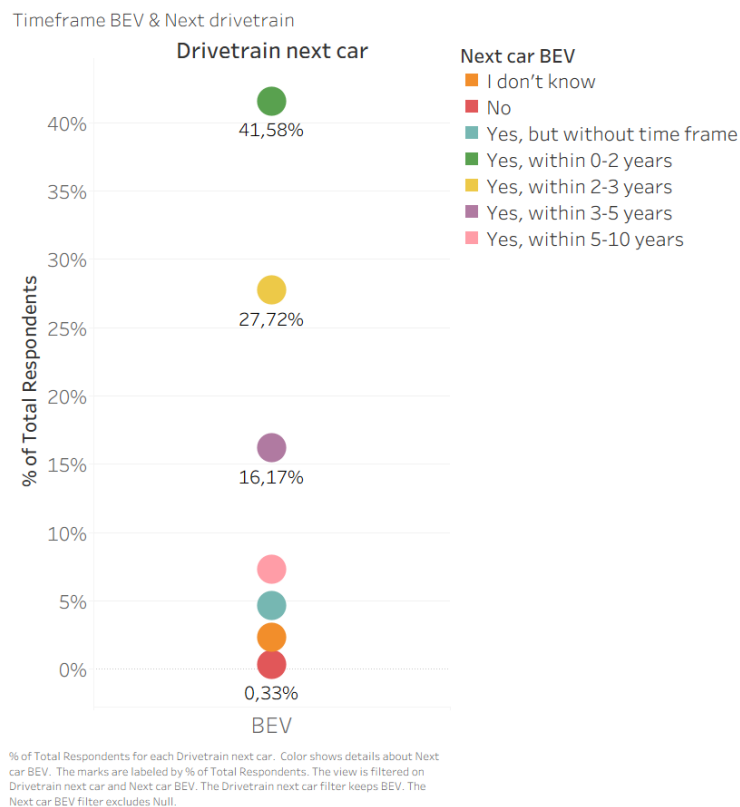
## 4. The Road to Future Adoption: Intentions, Motivations & Market Readiness

While perceptions shape openness to BEVs, adoption ultimately depends on whether consumers intend to switch, and on the concrete conditions that make a purchase feasible. This section examines purchase time frames, drivetrain preferences, willingness to pay and range expectations, and the motivations and barriers that determine Europe's readiness to adopt.

### 4.1. Intention to buy a BEV (time frame) & drivetrain preference for the next car

When asked about their next car, over one third (35%) expect it to be an ICEV, followed by an HEV (24%). BEVs account for 14% of next-car preferences, PHEVs for 13% and another 13% say they do not know yet.

When asked about the timeframe for a BEV purchase, more than a quarter of respondents say they do not want to buy a BEV (26%) regardless of timeframe. A further 16% are uncertain, and 15% express interest in a BEV but without a clear timeline. These results point in the same direction as the stated drivetrain preferences for the next vehicle.

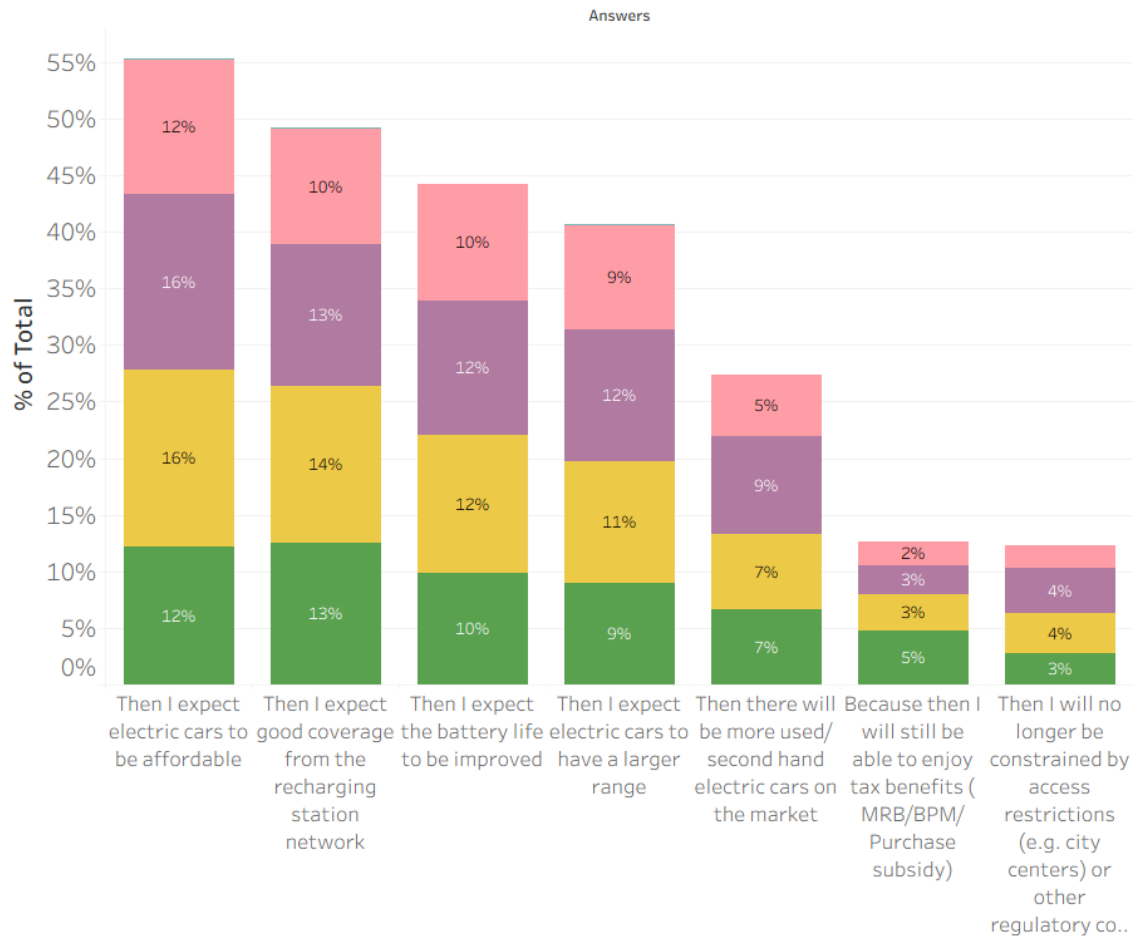


**Figure 10: Timeframe for respondents that will buy a BEV as their next car**

Figure 10 zooms in on the 'BEV purchase' timeframe of the respondents who state that their next vehicle will be a BEV, linking next-car drivetrain preference with their expected timing of a BEV purchase. The intentions are largely near-term: 69.3% expect to buy within 0–3 years, and a further 16% within 3–5 years. By contrast, respondents who expect their next car to be an ICE, HEV, PHEV, or Other, or who don't know the drivetrain, are much more likely to report no clear BEV purchase timeframe or to say they don't know. This suggests uncertainty, delayed or no commitment to a BEV outside the group that wants to buy a BEV as their next car.

Compared to the timeline of the purchase of their previous car, the data show that many respondents are active car buyers: almost half purchased their current vehicle within the last five years, and a similar share expect to purchase their next vehicle within the next three years. Among our respondents, new cars are more commonly bought (47%) than used ones, although a substantial minority (24%) regularly buys second-hand, 18% buys both new and second-hand cars and 11% never plans to buy or lease a vehicle. This indicates a relatively dynamic EU car market, with many households likely to make another purchase soon enough for drivetrain preferences to matter for the energy transition.

Why would you expect to buy a BEV in this timeframe?



% of Total for each Answers. Color shows details about Next car BEV. The marks are labeled by % of Total. The data is filtered on Abbreviation, which keeps Why BEV next. The view is filtered on Answers, which keeps 7 of 2.597 members.

**Next car BEV**

- Yes, but without time frame
- Yes, within 5-10 years
- Yes, within 3-5 years
- Yes, within 2-3 years
- Yes, within 0-2 years

**Figure 11: Reasons why respondents would buy a BEV with their timeframe included**

Across purchase horizons, respondents largely link their expected purchase to practical improvements, with the same ranking of reasons in almost every timeframe; lower costs, better charging coverage & better vehicle performance. The only notable exception is the 0-2 year group, where charging coverage is mentioned slightly more often than affordability of the BEVs- which is the top reason in the later timeframes.

Faced with a hypothetical choice situation where an EV is a concrete option, many respondents are willing to consider both new (40%) and used BEVs (27%), highlighting the importance of a well-functioning second-hand market for wider diffusion. The remaining 33% would either not replace their car and would use other transport options (23%), indicated not intending to buy a car (7%) or would go for a car sharing service. However, it should not be ignored that almost one in four (23%) would prefer not to buy a new car, over either a new or used BEV.

## 4.2. Willingness to pay & desired range

Stated willingness-to-pay (WTP) figures suggest that the price expectations for combustion engine cars and BEVs are of a similar order of magnitude. The median budget is just under €20 000 for both, and the upper quartile is slightly higher for BEVs, indicating that a segment of respondents is prepared to pay as much or more for an electric vehicle. At the same time, the lower quartile for BEVs is lower, pointing to a group that would only consider relatively cheap BEVs. Together, these results suggest that many potential buyers see BEVs as a realistic option in comparable price ranges, but current products and incentives do not yet sufficiently align with their cost expectations.

**Table 5: EU-27 drivers' willingness to pay towards ICEV & BEV**

Willingness to pay	ICEV	BEV
N (valid)	2,263	1,868 <sup>13</sup>
Mean	€ 22,032.19	€ 21,677.6
SD	€ 35,729.58	€ 25,955.6
Median	€ 19,200.00	€ 19,000.0
P25	€ 10,000.00	€ 6,315.0
P75	€ 28,800.00	€ 30,000.0

Finally, the expectations of the respondents about the range set a high bar: most respondents want at least 400–600 km of driving range, and a quarter expect more than 600 km. These expectations exceed the capabilities of many affordable BEV models today, further explaining why consumers anticipate buying electric “later”. In combination with the readiness to pay as much for a BEV as for a petrol car, the data suggest that the main challenge is not intrinsic unwillingness to adopt but the belief that current BEVs still fall short of desired performance and convenience.

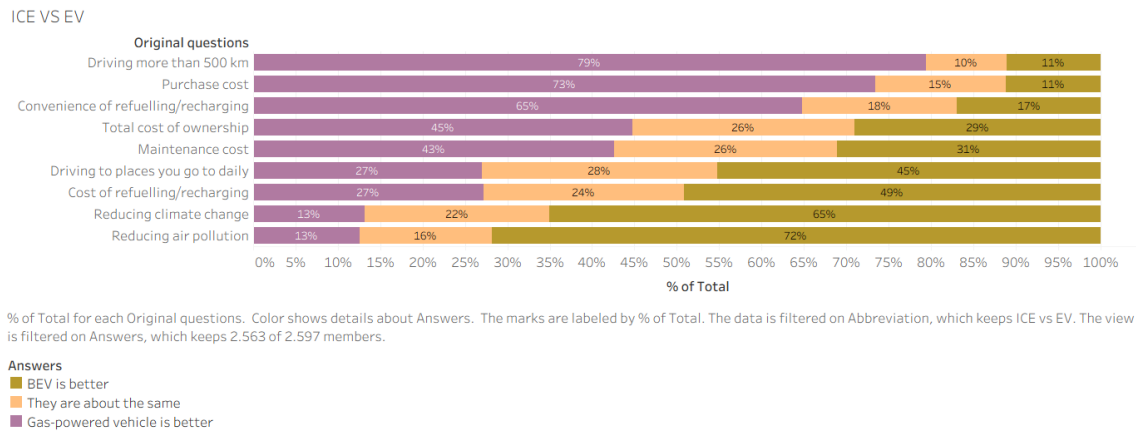
**Table 6: EU-27 drivers' desired driving range of a BEV**

What should be the range of a BEV?	# respondents	% of total
Min. 200 km	95	3.1%
Min. 200-300 km	207	6.8%
Min. 300-400 km	334	11%
Min. 400-500 km	633	20.9%
Min. 500-600 km	584	19.3%
More than 600 km	798	26.4%
Indicated previously to not intend to buy a car	202	6.7%
I don't know	171	5.7%

<sup>13</sup> The respondents sample is different as the extreme entries were deleted.

### 4.3. Motivations and barriers to adoption

Respondents clearly perceive BEVs as better for reducing air pollution and climate change, and many also see them as cheaper to recharge and suitable for daily driving. However, gas-powered vehicles are viewed as superior for long-distance trips and have a strong perceived advantage in purchase price. The convenience of refuelling also greatly favours conventional cars. Overall, the main barriers to BEVs remain upfront cost, long-distance usability, and charging convenience, while their environmental benefits and lower running costs are widely recognised.



**Figure 12: EU-27 drivers' comparison of gas-powered vehicles vs. BEVs**

Respondents mainly point to financial incentives and vehicle performance/charging conditions as triggers that could convince them to acquire an electric car. A sufficiently high purchase subsidy is the most frequently selected reason (44%), followed by a sufficient driving range (39%). Next come enablers linked to charging and running costs, including access to private charging (29%), tax/fee exemptions (28%), and a dense public charging network (25%). Notably, even among those currently saying their next car will not be a BEV, a proportion of respondents still reports potential tipping points (i.e. decision triggers), especially regarding range and subsidies, although “none of the above” is also reported highly by this group.

Notably, even among those currently saying their next car will not be a BEV, a share still reports potential tipping points, especially range and subsidies, although “none of the above” is also reported highly by this group.

Which of the below reasons could convince or ensure you to acquire an electric car in the (near) future?

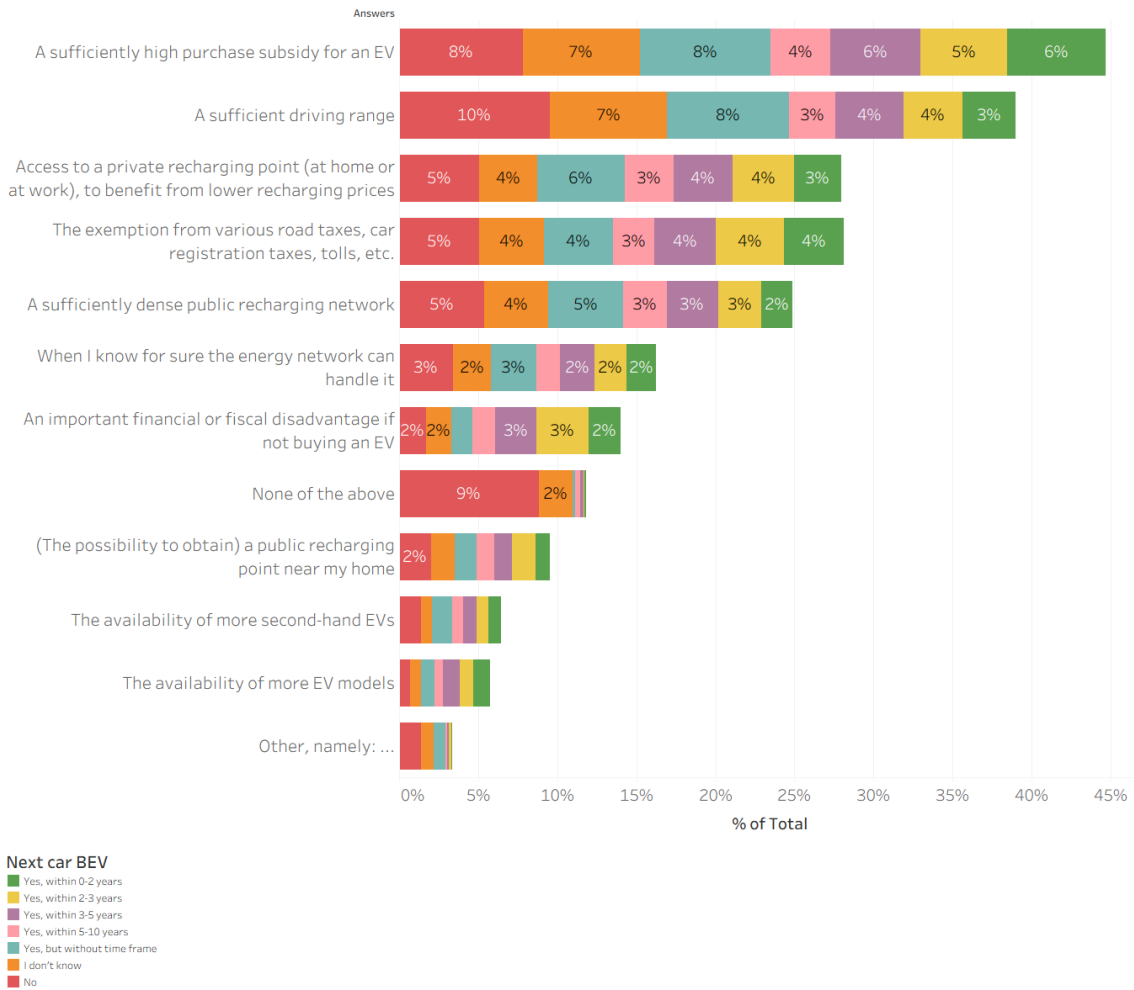


Figure 13: EU-27 Drivers' reasons that convince buying a BEV with their timeframe

#### 4.4. Vehicle-to-Grid (V2G) & governmental subsidies knowledge

Awareness of Vehicle-to-Grid (V2G), i.e. bidirectional charging that allows an EV battery to provide electricity back to the grid or to the home, remains low. Three quarters of EU-27 drivers (76%) have not heard of V2G, while only 5% report knowing quite a bit or a lot about it.

When asked about what would increase their acceptance of V2G-related functionalities, respondents most often point to financial and control-related conditions. The four most-selected are: *“Possibility to schedule the charging process, thus benefiting from lower electricity prices (smart charging)”*, *“Possibility to have access to government grants/subsidies”*, *“Being able to obtain direct remuneration by participating in advanced flexibility schemes/tariffs, such as V2G (bidirectional charging)”* & *“Being able to use the battery of my vehicle to power my home (appliances, heating, etc.)”*

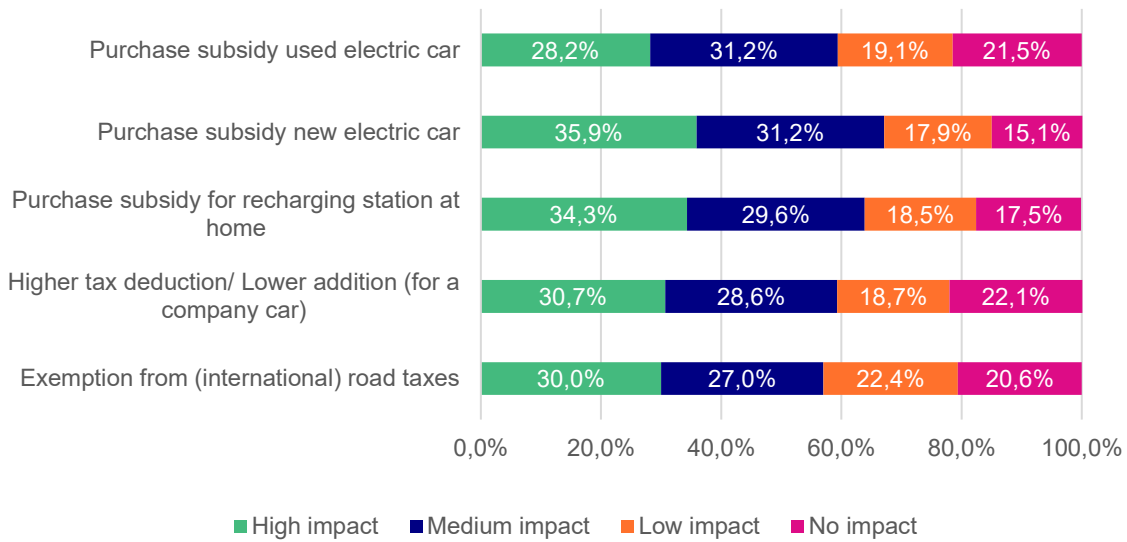
More broadly, while many EU Member States offer measures to financially encourage electric driving, consumer awareness of these incentives is limited. The best-recognised measure is a purchase subsidy for a new BEV (31%), but a large share of respondents indicate limited knowledge overall (67%):

**Table 7: EU-27 drivers' knowledge of governmental subsidies for electric driving**

Do you know whether your government provides any of the following subsidies for electric driving?	# respondents	% of total
Purchase subsidy for a new electric car	931	30.8%
I am not aware of any tax deductions/exemption for electric driving	922	30.5%
I am not aware of any subsidies for electric driving	631	20.9%
Road tax exemption (purchase tax)	559	18.5%
I know that electric driving benefits from subsidies, but I don't know exactly which ones	468	15.5%
Purchase subsidy for recharging station at home	375	12.4%
Exemption from international road taxes	335	11.1%
Purchase subsidy used electric car	316	10.4%
Higher tax deduction/ Lower addition (for a company car)	287	9.5%
Others, namely: ...	40	1.3%

Despite this low awareness, subsidies are perceived as influential. Purchase incentives for new BEVs and home-charging installations have the strongest potential impact, followed by tax advantages and road-tax exemptions. This suggests that financial support could meaningfully encourage BEV uptake, but its effectiveness depends on clearer communication to consumers. It should be noted that the indicated impacts of the different incentives do not differ much in general.

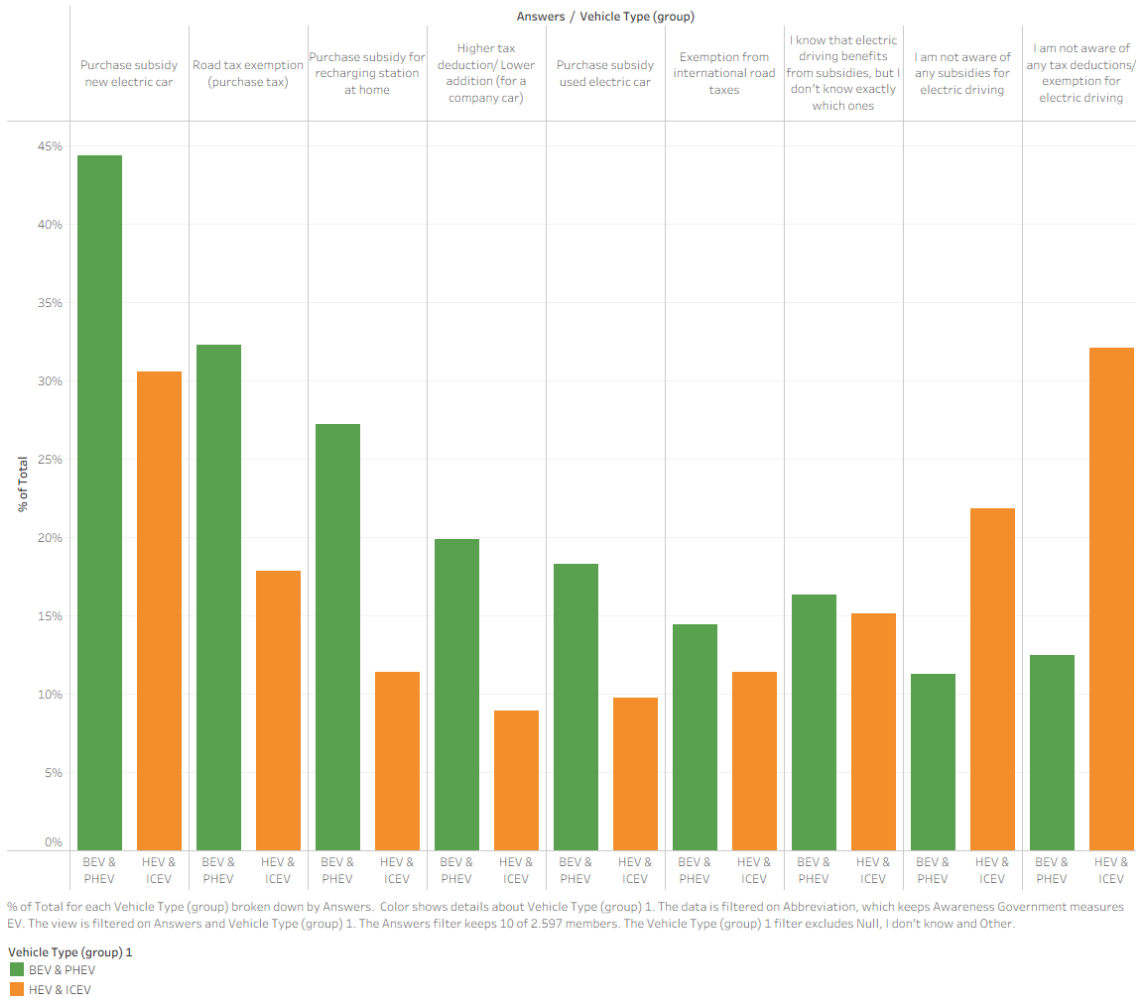
To what degree would the following governmental incentives influence your decision to switch to a fully electric vehicle?



**Figure 14: Perceived impact of governmental incentives on EU-27 drivers' decision to drive a BEV**

Awareness of governmental incentives for electric driving remains uneven and strongly differentiated by vehicle type, as illustrated in Figure 15. While purchase subsidies are relatively well recognised, especially among BEV/PHEV drivers, knowledge of more technical measures such as tax exemptions and company-car benefits is lower among HEV/ICEV drivers. A substantial share of HEV/ICEV drivers report being unaware of any tax advantages at all, pointing to a persistent information gap beyond purely financial barriers. General awareness that incentives exist appears broader than a detailed understanding of specific measures, suggesting limited depth of knowledge. Overall, the findings indicate that communication and transparency of policy instruments play a critical role in broadening the potential adoption base.

Awareness Governmental Measures



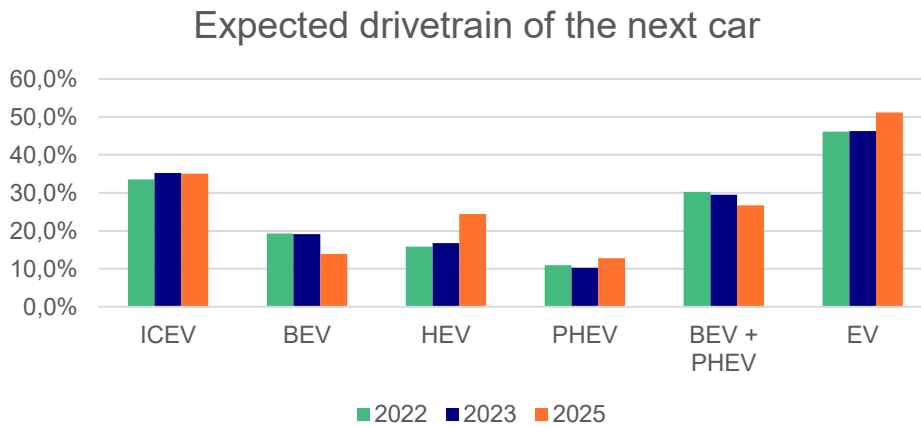
**Figure 15: Awareness of governmental measures per vehicle type**

### 4.5. Longitudinal picture of adoption readiness and policy knowledge (2022–2025)

Compared to 2022 and 2023, more respondents in 2025 expect to buy their next car within 0-3 years; almost half of the respondents plan to get a new car in that period. The groups wanting to buy a car in 3-10 years or not knowing yet are shrinking, while the group that will never buy a car remains rather stable after 2023, suggesting respondents increasingly have a concrete plan.

This is confirmed by the shrinking share of respondents who do not know yet what drivetrain their next car will have. Compared to 2022 and 2023, interest in BEVs as a next car cools off in 2025. However, when looking at all electrified drivetrains (BEV + PHEV + HEV), just over half of respondents expect their next car to be at least partly electric, a steady increase over the three surveys. A larger share of HEVs drives this growth compared to previous surveys, while the plug-in capable share (BEV + PHEV) decreases as people seem to shift towards

HEVs. ICEVs remain about a third of future car choices, which might be influenced by the sample distribution, with a more deliberate search for BEV users in 2022 and 2023.

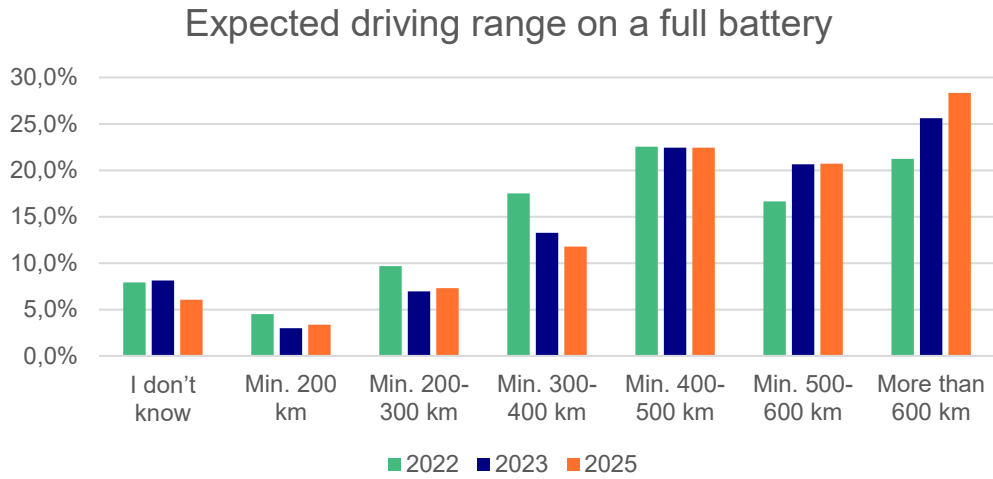


**Figure 16: Expected drivetrain of the next car**

Among non-BEV drivers, considering a BEV at all rises by about 8% across the three surveys (50%, 56.5% & 58%). A growing share have a specific timeframe in mind if they were to buy a BEV, and especially a short-term one (0-3 years).

The main reasons for buying a BEV in that period remain the expectation that they will be affordable, that there would be good coverage from the charging network, improved battery life and larger range. The most convincing reasons remain a high purchase subsidy, a sufficient driving range, exemption from various road taxes and access to a private recharging point to benefit from lower recharging prices.

In a hypothetical situation where respondents would be forced to purchase a BEV, most would buy their own EV, while over the years, a growing minority indicate they would abandon car ownership (24.4% in 2025) and use other modes instead. With regard to driving range, the share of respondents who want more than 600 km as driving range has increased, while others have plateaued.



**Figure 17: Expected driving range on a full battery**

When asked about incentives by their government, in 2022 the most indicated answer was that respondents were not aware of any subsidies for electric driving. In 2023 that was that respondents were not aware of any tax deductions or exemptions. This changed in 2025 with 'purchase subsidy for a new electric car' as the best-known incentive.

## 5. Zooming in on cross-Country Insights of seven large-market countries

This section compares seven large-market countries to identify where attitudes and intentions diverge, what signals emerge for policy, and how these patterns have evolved since 2022.

### 5.1. Overview of selected countries

This section focuses on a set of large-market countries within the EU-27. These countries all have a sample size of more than 100 respondents: Germany, France, Italy, Spain, Poland, the Netherlands, and Romania. Figure 18 shows with coloured dots the seven countries and their sample size. The other surveyed countries are included in grey, with their respective sample size, for full transparency.

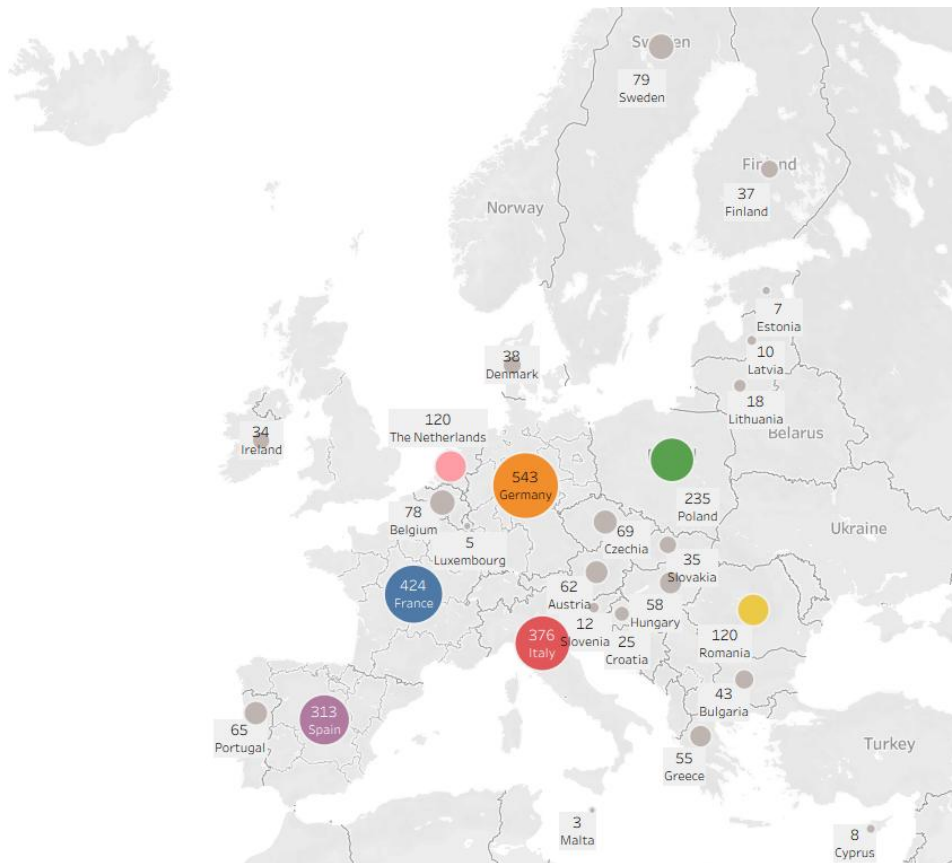
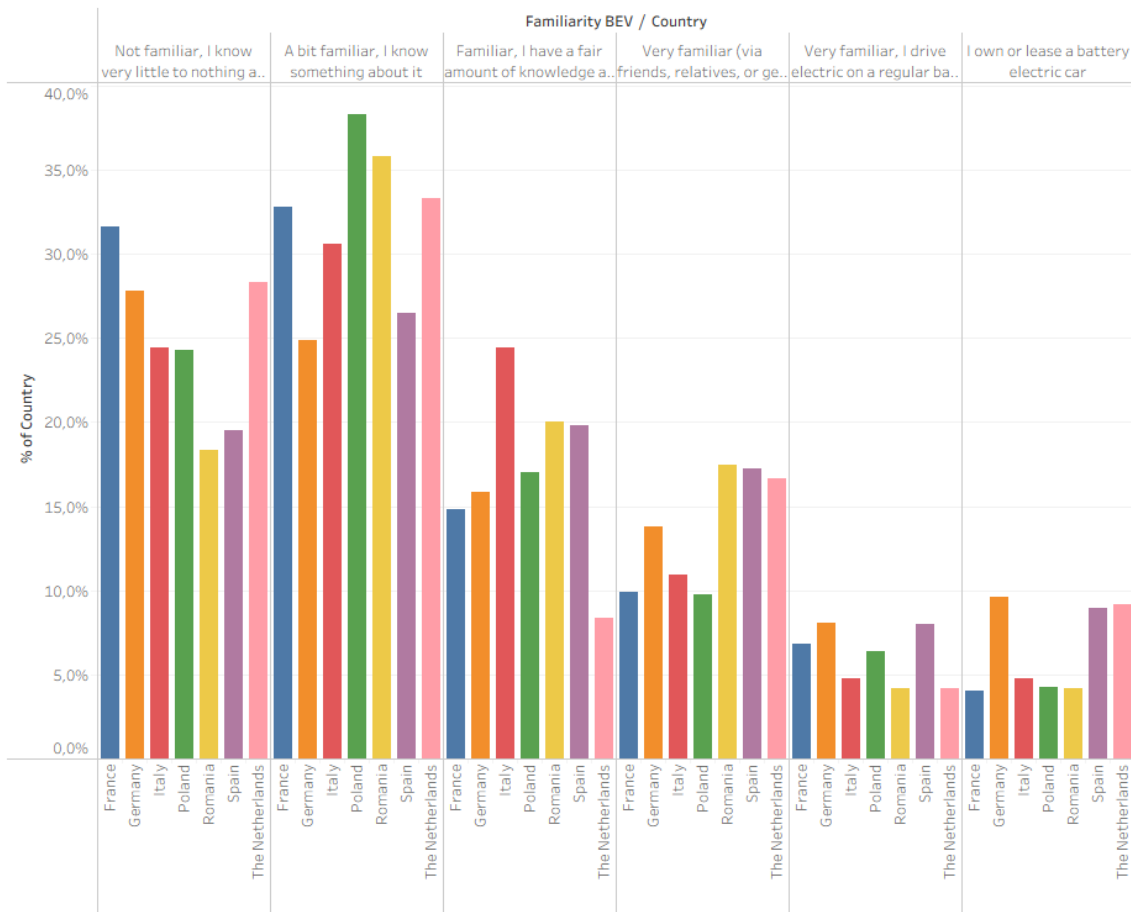


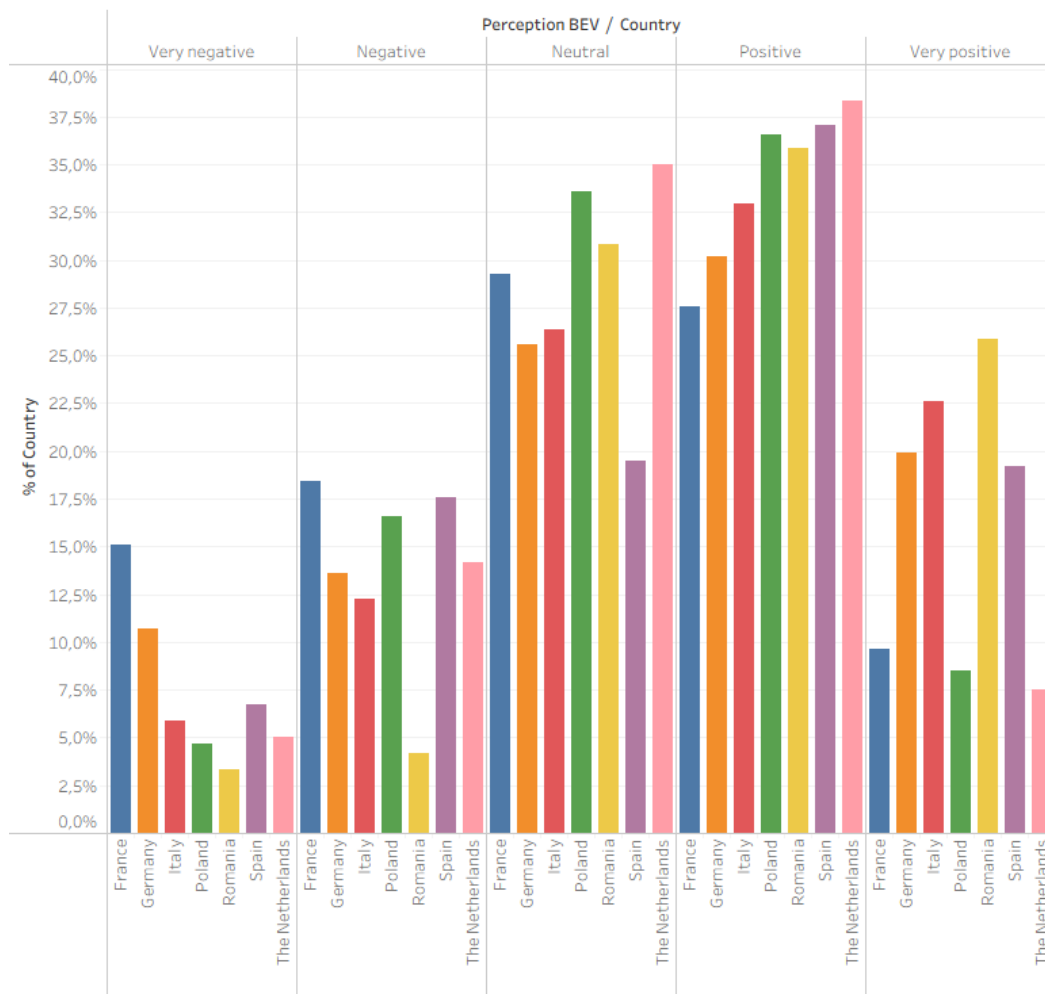
Figure 18: Map of sample size of EU-27 with the large-market countries highlighted

## 5.2. Cross-country attitudes



**Figure 19: Familiarity towards BEVs of large-market countries**

The familiarity with BEVs varies across the countries, but most drivers sit in the middle rather than at the extremes. France, the Netherlands and Germany show the highest shares of low familiarity. Poland and Romania are dominated by ‘a bit familiar’ consumers, suggesting broad awareness but limited depth of understanding. Italy and Spain stand out for higher levels of declared familiarity, pointing to stronger BEV exposure. Actual hands-on experience remains limited everywhere, with regular BEV driving and ownership still below 10% in all countries. Germany and the Netherlands lead on BEV ownership, reflecting more advanced market development. Overall, familiarity lags behind positivity, highlighting education and experience as key levers for adoption.

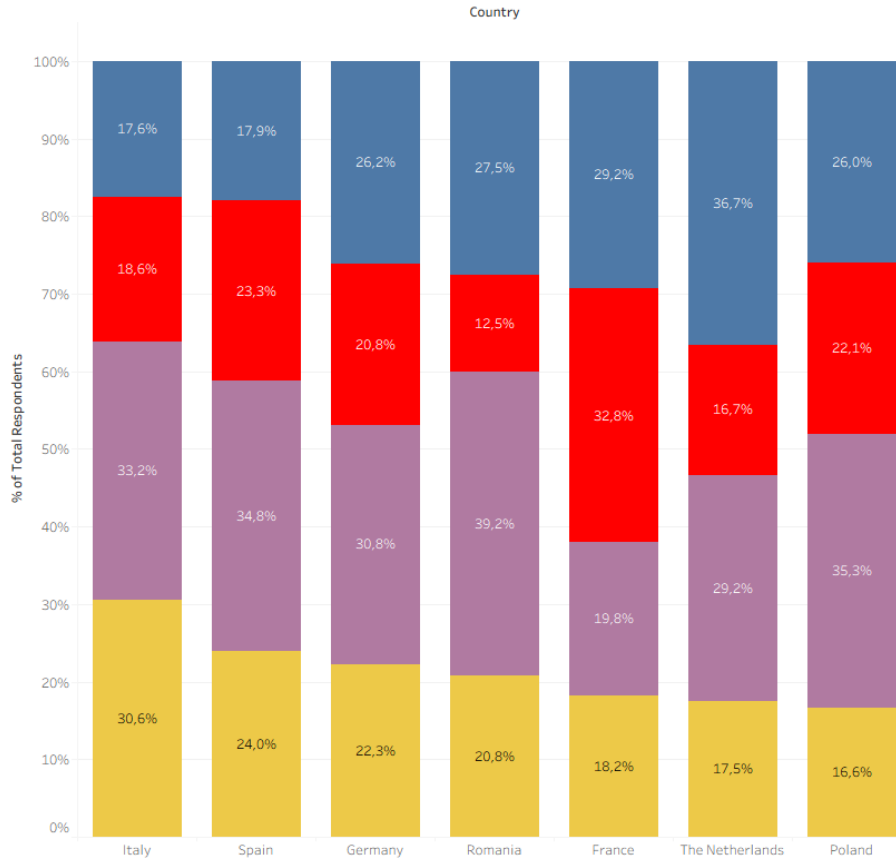


**Figure 20: Perception towards BEVs of large-market countries**

Across all selected countries, positive perceptions of BEVs outweigh negative ones, indicating that the challenge is conversion rather than basic acceptance. Romania, Spain and Italy stand out as high-conviction markets, with notably large “very positive” segments and low resistance, suggesting strong appeal. Germany also shows solid positivity, but with more caution, reflecting a mix of enthusiasm and practical concerns. The Netherlands and Poland are characterised by large neutral groups and relatively low “very positive” shares, pointing to pragmatic mindsets that probably require reassurance on the perceived disadvantages of BEVs. France clearly stands apart as the most sceptical market, combining the highest negativity with the weakest enthusiasm. This indicates that BEVs are more polarising in France than elsewhere. Overall, BEV perception appears driven as much by cultural and political context as by economic or infrastructure factors.

### 5.3. Cross-country BEV purchase intentions (near term, long term)

BEV Purchase Timeframe filtered Priority Countries



% of Total Respondents for each Country. Color shows details about BEV purchase timeframe. The data is filtered on Country Set, which keeps 7 members. The view is filtered on BEV purchase timeframe, which keeps Don't know, Later/unsure timing, Near-term (0-3y) and No.

**BEV purchase timeframe**  
■ Don't know  
■ No  
■ Later/unsure timing  
■ Near-term (0-3y)

**Figure 21: BEV purchase timeframe for large-market countries**

Figure 21 presents intended BEV purchase timing across the seven large-market countries, using a simplified set of categories compared to section 4.1. This is to improve cross-country readability. “*Near term (0-3y)*” combines the 0-2 years and 2-3 years options. “*Later/unsure*” combines 3-5 years, 5-10 years and “*yes, but without timeframe*”. “*No*” is unchanged, and all remaining responses are grouped as “*Don't know*”.

Across countries, the later/unsure segment is the largest, indicating that interest often exists but without clear purchase horizon. France is the exception, where the largest group states that they are not willing to buy a BEV. Looking at near-term intentions, Italy show the highest share planning a BEV purchase within 0-3 years, while Poland has the lowest. Romania stands out for having one of the largest overall “yes” shares, but this is driven mainly by later/unsure timing rather

than near-term plans. Finally, uncertainty is most pronounced in the Netherlands, which has the highest “*Don’t know*” share.

In conclusion, the country patterns in intended BEV purchase timing align with differences in familiarity and perception. Countries with comparatively more negative perceptions and lower familiarity (notably France) also show higher shares who are not willing to buy a BEV or remain uncertain. Conversely, countries with a more positive sentiment profile (such as Italy, and to a lesser extent Spain) show a larger near-term segment. The Netherlands stands out for high uncertainty, which is consistent with a profile dominated by neutral/positive perceptions but relatively limited “fair knowledge”, suggesting openness without a clear purchase decision. Romania combines very positive perceptions with a predominantly later/unsure timing, indicating that favourable attitudes may coexist with practical constraints that delay purchase.

## 6. Conclusion: key messages and implications

This final section synthesises the 2025 findings and the 2022–2025 trends into the key messages and translates the findings into implications for policymakers and industry.

### 6.1. Key European-level messages

The EAFO Consumer Monitor 2025 surveyed 3,019 car drivers across all EU-27 countries. The findings show that electrification is advancing across Europe, but uptake remains uneven and is strongly shaped by socio-economic and housing conditions. Adoption is concentrated among higher-income and higher-education groups and among households with private parking, while households living in apartments and relying on on-street parking are associated with lower perceived feasibility and lower likelihood of near-term switching.

Four out of five European drivers are positive or neutral to electric vehicles, with a large share of the European drivers in a “movable middle” attitude,. In the funnel, going from general perceptions to purchase intention is closely associated with perceived personal compatibility (i.e. whether an electric vehicle is considered workable in everyday life) suggesting that practicality perceptions are important towards the intention to buy.

Affordability continues to dominate the consumer decision, with purchase price being the most important barrier. At the same time, consumer expectations for driving range are high, and the combination of mainstream budget constraints with demanding range expectations contributes to delayed purchase intentions where the market offer is perceived as not in line with preferences.

Access to recharging is less prominent as a concern than in previous waves of the survey, consistent with expanding infrastructure. Nevertheless, access and convenience remain unevenly distributed, with households lacking private parking more likely to face practical and perceived constraints; near-home charging availability and reliability remain critical for broad uptake.

With respect to existing support measures, policy effectiveness is influenced by information and familiarity. Awareness of available measures is limited among many drivers, reducing the effective reach of incentives even where they are perceived as influential. Awareness of vehicle-to-grid concepts is also low, and acceptance appears conditional on clear user benefits, transparency, and consumer control, indicating that market readiness for flexibility services depends on both technical deployment and consumer-facing value propositions.

Across the seven large-market Member States (Germany, France, Italy, Spain, Poland, the Netherlands and Romania), consumer BEV readiness follows distinct

patterns rather than a single trajectory. Familiarity varies and perceptions are overall positive everywhere but differ in intensity. Timelines to purchase a BEV also diverge, with “later/unsure” as largest group.

## 6.2. How consumer sentiment has shifted since 2022

Taken together, the 2022, 2023 and 2025 surveys portray a market that is clearly moving towards electrification, but in a cautious and pragmatic way. The main barrier remains the purchase price, with second place the driving range (only now in 2025), pushing the earlier barriers of lack of charging options, both private and public, down the list. That BEVs are good for the environment remains the most stated advantage, with the good driving characteristics as second and the economical use as third. Across all years, attitudes towards electric driving remain net positive and a substantial share of respondents consider an electric drivetrain for their next car. The 2025 results do show a shift from strong enthusiasm towards more moderate views and a slight growth of the ‘not for me’ share. The overall picture seems to be a normalisation process in which BEVs become a realistic option for many, but not a novelty that excites.

The timeframe within which respondents want to buy their next car reinforces this interpretation. Between 2022-2023 and 2025 the replacement horizons changed. In 2025 more respondents expect to acquire a car in the next three years and fewer indicated ‘*I don’t know*’. Households seem to be more certain and more short-term oriented in their car acquirement plans. This creates a crucial window: decisions taken in this period will lock in drivetrain choices for many years. Over half of the respondents still expect their next car to be at least partly electric, a steady increase over the three surveys. Pure ICEVs remain stable at roughly one third of the intended next cars.

Finally, these trends should be interpreted with some caution. The 2025 wave has a different sample size and may differ slightly in composition from the earlier EU-wide surveys, and macro-economic or policy changes between waves can influence preferences in ways not captured directly in the questionnaire. Nevertheless, the direction of change across multiple indicators is consistent: electrification is progressing, purchase decisions are moving closer in time, and the market is shifting from early-adopter enthusiasm towards a more mainstream, risk-managed adoption path in which hybrids currently play a pivotal bridging role.

### 6.3. Implications for policymakers and industry

This section translates the EAFO Consumer Monitor survey findings of 2025 and insights over the different waves 2022-2025 into implications for policymakers and industry to accelerate the transition to zero-emission mobility.

With respect to charging infrastructure, charging-related concerns are cited in 2025 less frequently than in earlier survey waves, which is consistent with the continued expansion of charging infrastructure. Charging access remains a key constraint for specific groups (i.e. households living in apartments and drivers that park on-street). Hence, the ability to charge conveniently near where people live remains a key enabling condition for EV uptake, and it risks creating an uneven transition if solutions are perceived as “home-charging-only.”

At the same time, the findings also point to a context where public and semi-public charging is becoming more available. In policy terms, this points to the relevance of complementing home-charging measures with approaches that increase the visibility and usability of near-home alternatives (e.g., on-street, neighbourhood hubs, shared residential charging for apartments, workplace charging), including through clearer consumer-facing information on availability, access conditions, typical costs and reliability. For industry, this means that market growth increasingly depends on propositions that work for drivers without access to private parking, with charging framed as a usability and trust proposition alongside infrastructure deployment. As public charging coverage increases, differentiation for operators, OEMs and service providers is increasingly linked to reducing friction and uncertainty through transparent pricing, simple access and payment, reliable service, and customer guidance that translates local charging options into practical “use cases” for different living situations.

In 2025, consumer attitudes are often neutral rather than polarised, and the reported adoption funnel indicates that the key drop-off occurs when general perceptions are translated into personal compatibility and near-term purchase intent. This points to a policy relevance in measures that reduce practical uncertainty around everyday use, e.g. transparency on costs and benefits, charging availability and reliability and predictable user experience, so that neutrality can more easily translate into informed, feasible decisions rather than delayed purchase intent timelines. For industry, the commercial opportunity lies with consumers who are not rejecting electrification, but who are uncertain about personal compatibility. This shifts emphasis toward propositions that convert interest into lived feasibility: simplifying the purchase-and-use journey, bundling vehicles with charging and services, reducing perceived risk through clear warranties and support, and offering tools that help consumers map their mobility patterns to an appropriate charging solution.

Affordability remains the primary barrier to BEV uptake, and driving range is now the second most important concern, meaning that drivers make an even more than before price–range trade-off. The reported willingness-to-pay levels alongside high range expectations indicate a persistent mismatch that contributes to delayed purchase timelines. This calls for policy measures that strengthen affordability and reduce uncertainty about real-world usability, including through conditions that support total cost predictability, second-hand market confidence, and reliable long-distance charging performance. In terms of industry implications, this increases the commercial value of lowering and clarifying lifecycle costs, communicating real-world range transparently, and ensuring reliable fast-charging experiences that reduce the perceived need for premium-range specifications. To broaden the customer base, there is also the strategic importance of residual value and second-hand market confidence.

Finally, limited public awareness of available incentives appears to reduce the real-world effectiveness of support measures, even where incentives are assessed as influential. This points to an increased need of transparency and communication as policy enablers, making eligibility, application steps, and expected benefits easier to understand and compare, so that incentives translate more consistently into uptake decisions. At sales points, car vendors, OEMs, leasing providers and charging point operators gain from integrating clear, trusted information on incentives and total cost impacts into customer journeys, reducing uncertainty and avoiding lost demand due to information gaps.

## 7. Annex I: Consumer monitor 2025: methodology and approach

For the 2025 launch of the EAFO consumer monitor survey, all EU-27 countries were selected. The survey was conducted using a panel on the general population of all EU-27 countries.

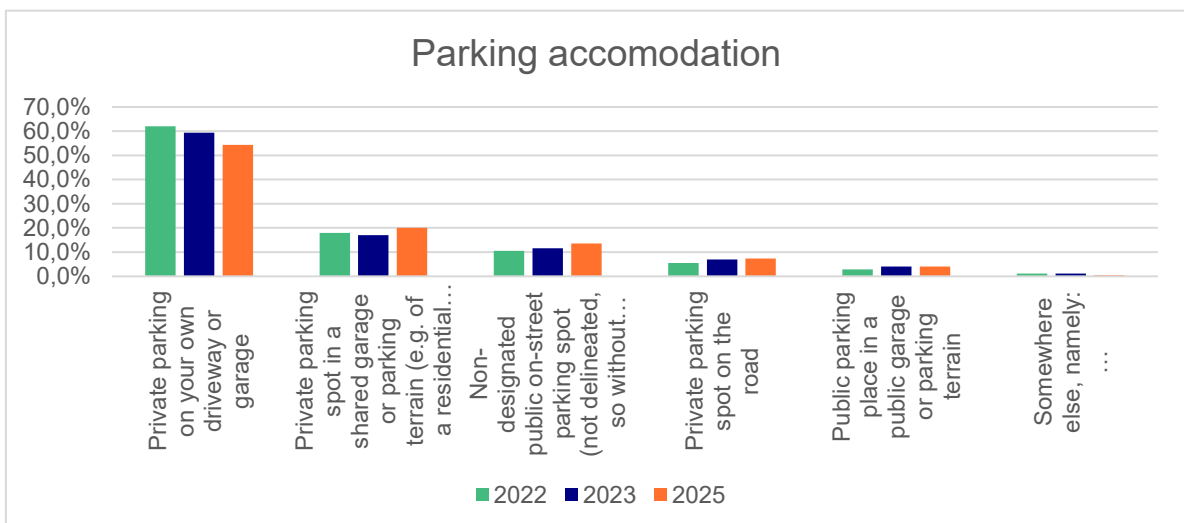
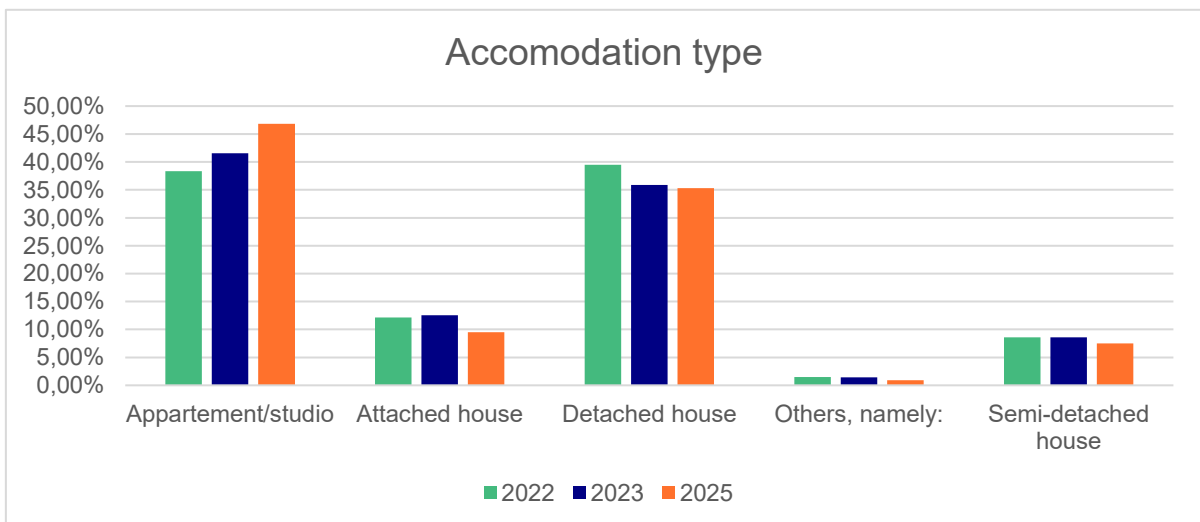
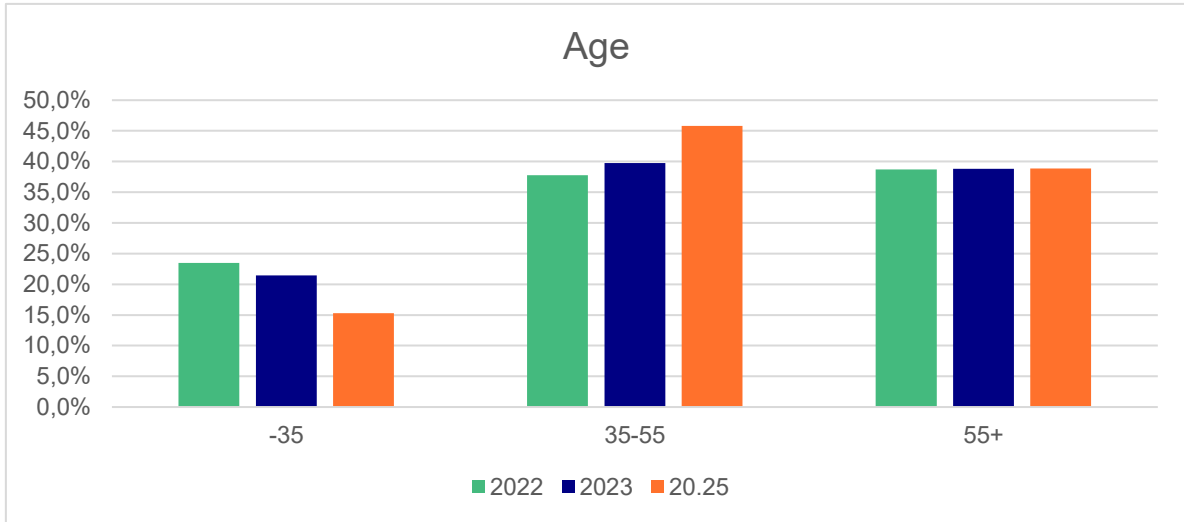
The survey campaign was launched mid-October 2025. For the EU-27 panel, the aim was to reach 3,000 responses. The survey was open for one month.

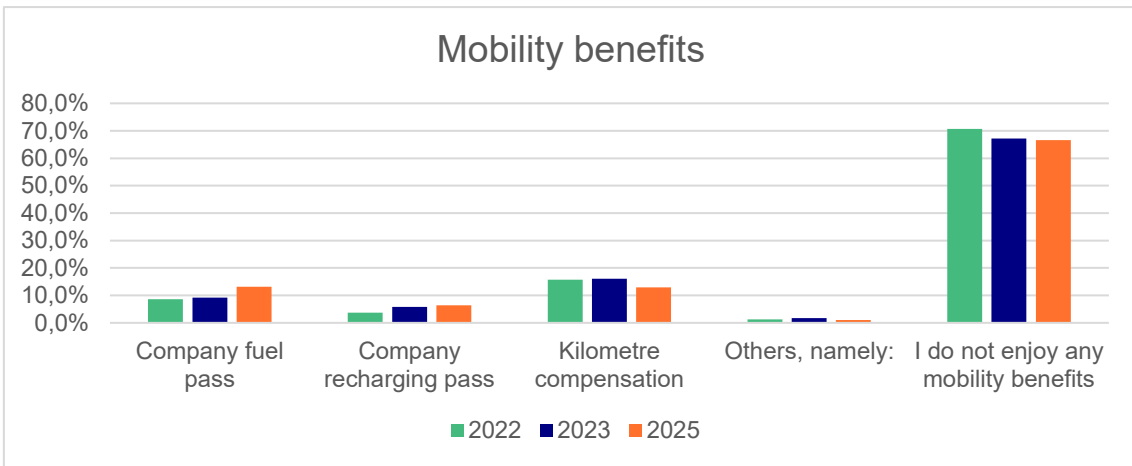
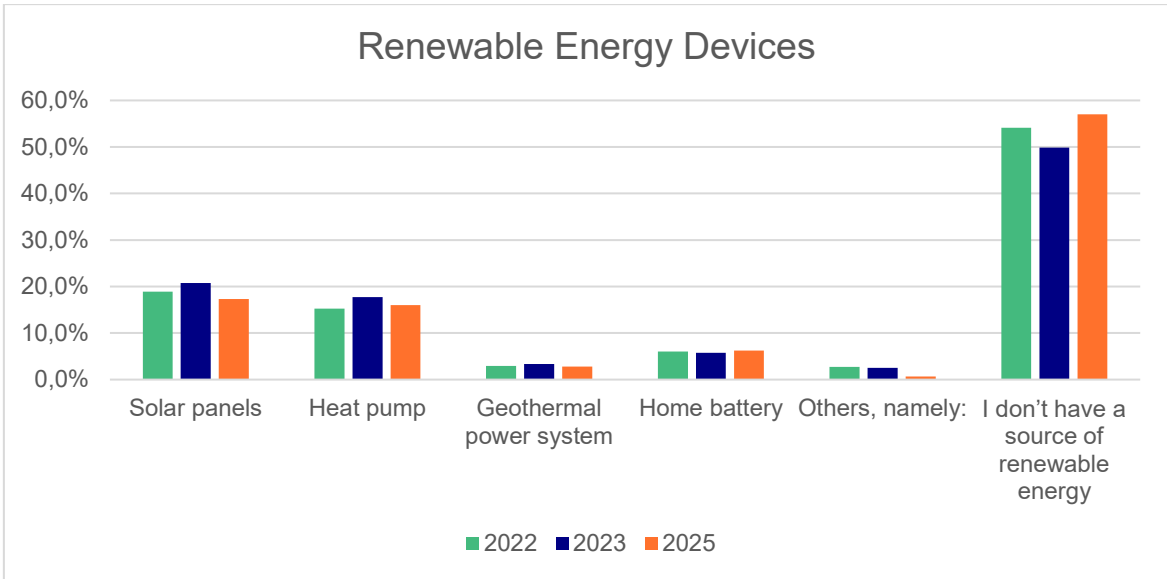
The datasets were subjected to validation tests, including:

- Respondents should have completed the survey by the end and should have agreed to the terms and conditions of the survey.
- Respondents who specified not owning a driver's license were excluded.
- Respondents, who filled out the survey in one-third (or less) of the time median for all respondents, were excluded from the survey, as it was deemed impossible to fill out the survey thoroughly and in its entirety in this short time.
- Respondents who indicated unusually high values to open questions with continuous variables (kilometres driven in a day, kilometres driven in a year, purchase price of a BEV and purchase price of an ICEV) were excluded from the results.
- Respondents who came up with nonsensical patterns of answers to open questions were excluded.

The validation of all the datasets was finalised in November 2025. A total of 3,024 responses were considered valid.

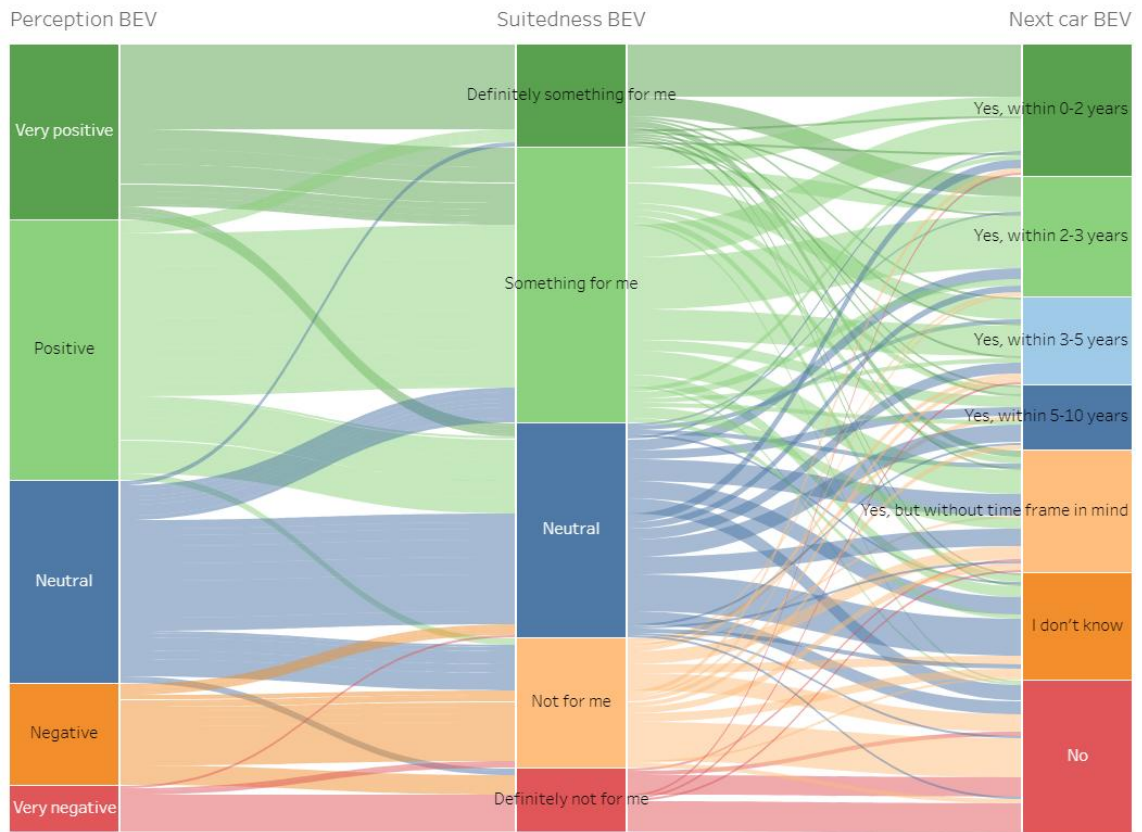
## 8. Annex II: Additional charts and tables



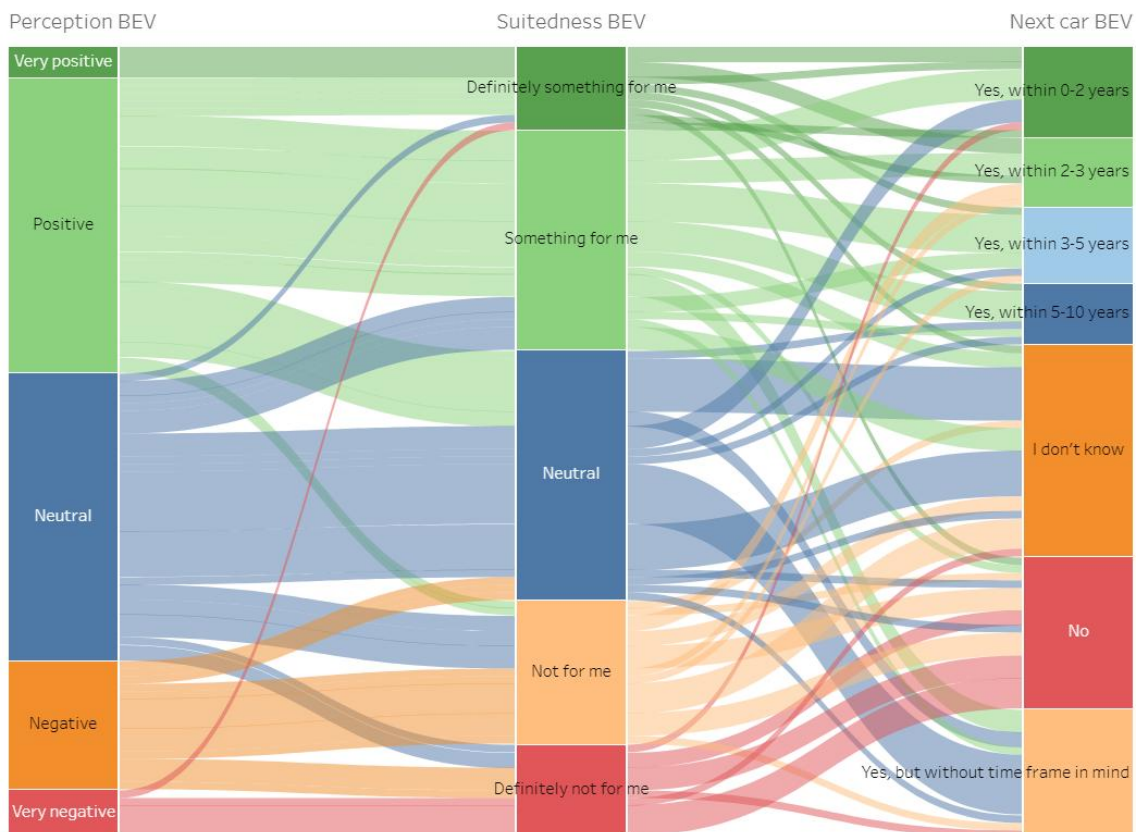




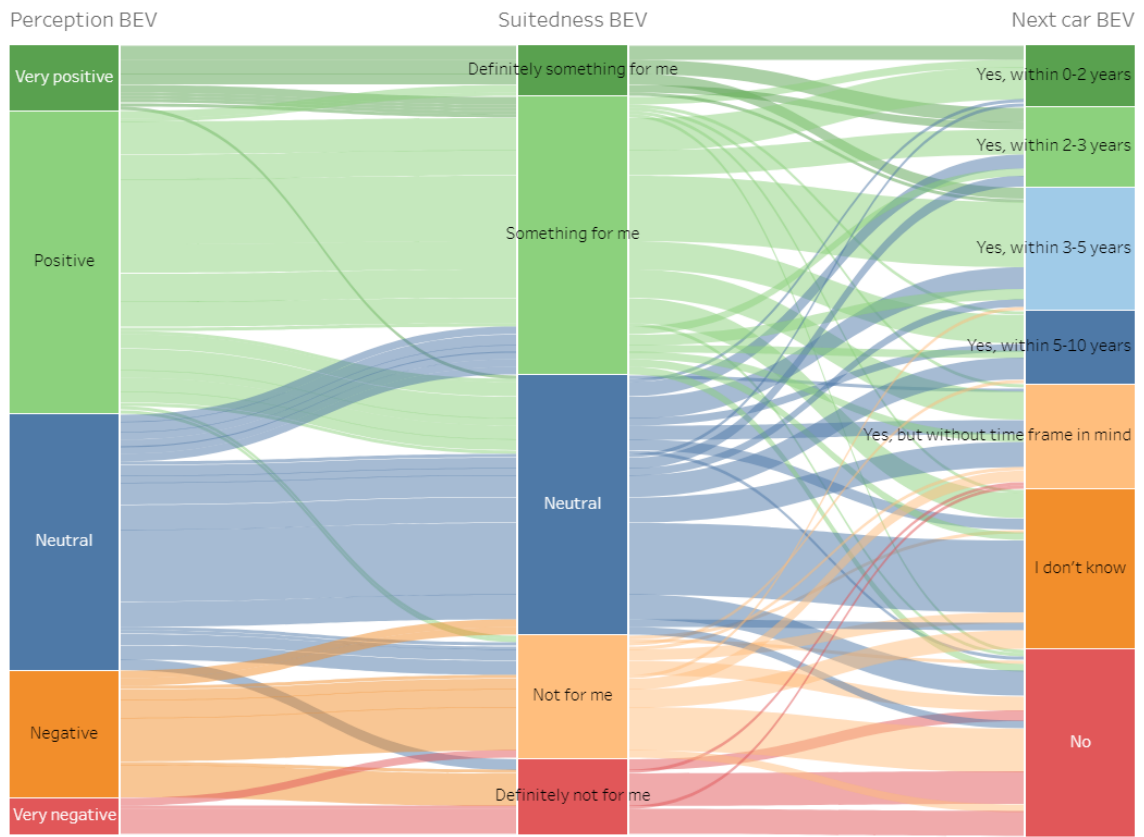
### Attitude-Purchase Funnel Italy



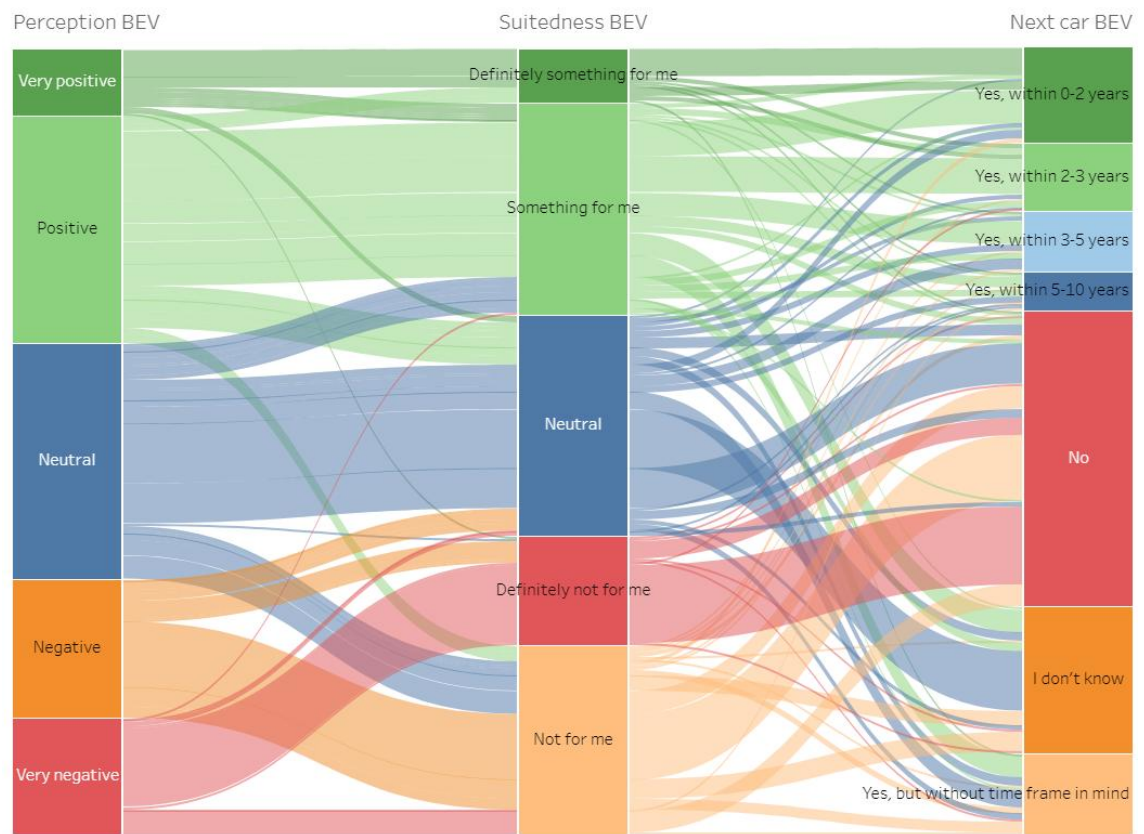
### Attitude-Purchase Funnel The Netherlands



### Attitude-Purchase Funnel Poland



### Attitude-Purchase Funnel France



# Attitude-Purchase Funnel Germany

Perception BEV

Suitedness BEV

Next car BEV

