

# Consumer attitudes to low and zero-emission cars

October 2018

## Background

This briefing summarises the results of a citizens survey undertaken by Ipsos Mori for Transport & Environment (T&E) examining attitudes towards low-carbon and electric cars across Europe.

The survey was undertaken during the first two weeks of September 2018 in nine European countries: Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Spain, and Sweden. In each country a sample of 500 adults were surveyed online meaning there was a total of 4,500 citizen attitudes polled. While the sample in each country was not large it was designed to be representative. A full set of data associated with the survey are provided alongside this briefing. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of  $\pm 5.0$  percentage points for respondents in each country, and  $\pm 1.7$  percentage points for all respondents surveyed.

On October 3<sup>rd</sup>, the European Parliament will vote on the proposal of the European Commission setting standards for 2025 and 2030 on the CO2 emissions from new cars and vans. In parallel the member states of the EU will also be finalising their views. This briefing details the attitudes of Europeans to low-carbon and electric vehicles and regulations to encourage their uptake. The poll shows that a significant majority are much more progressive and ambitious than Members of the European Parliament or national government delegations that supposedly represent them.

## 1. Citizens overwhelmingly want more fuel-efficient cars and expect the car industry to do more to provide them

A key purpose of the survey was to understand the extent to which there is demand for more fuel efficient or zero-emission vehicles. The car industry frequently claims there is no demand for more fuel efficient cars. But the survey found nearly 9 in 10 Europeans (89%) support proposals that would require car companies to improve the fuel efficiency of the cars they make. Views are remarkably consistent throughout the countries surveyed, though support is highest amongst Italians (94%), Spaniards (92%) and Hungarians and British citizens (91%). Even 82% of Germans, renowned for their love of cars, still want them to use less fuel.

Citizens that support	Average	Belgium	Poland	Sweden	Hungary	France	Germany	Great Britain	Italy	Spain
Requiring that car companies increase the fuel efficiency of the cars and vans they make	89%	88%	89%	84%	92%	88%	82%	91%	94%	92%

Approaching two-thirds of surveyed citizens (62%) also think that carmakers are not doing enough to sell electric vehicles by attractive marketing, pricing and offering enough choice. This includes 72% of French

people, 68% of Germans and 67% of the British surveyed - the three biggest new car markets in the European Union.

Disagree that	Average	Belgium	Poland	Sweden	Hungary	France	Germany	Great Britain	Italy	Spain
Car companies are presently doing enough to encourage me to buy electric or fuel cell cars by attractive marketing, pricing and offering enough choice.	62%	73%	61%	51%	51%	72%	68%	67%	55%	60%

## 2. There is a market for electric cars – but price is a barrier

The car industry has repeatedly argued there is little demand for electric cars. But the survey finds citizens are willing to buy plug-in vehicles, with 5-12% of citizens across the countries surveyed saying it is very likely that the next car they will buy or lease will be an electric or fuel cell car. Whilst this is a small proportion, it is more than the 2% of sales at present and shows there is room for significant growth in the short term if electric cars are made available.

How likely is it that the next car you buy or lease will be an electric or fuel cell car?	Average	Belgium	Poland	Sweden	Hungary	France	Germany	Great Britain	Italy	Spain
Very likely	7%	6%	5%	12%	9%	6%	5%	6%	9%	10%
Somewhat likely	33%	32%	27%	32%	32%	24%	25%	26%	48%	48%
Not too likely	39%	40%	51%	38%	39%	43%	35%	39%	36%	28%
Not at all likely	21%	22%	17%	18%	20%	28%	35%	29%	8%	14%
Total likely	40%	39%	32%	43%	41%	30%	30%	32%	56%	58%
Total not likely	60%	62%	68%	57%	59%	70%	70%	68%	44%	42%

A much more significant third of those surveyed (24-48%) said it is *somewhat likely that the next car they will buy or lease will be an electric or fuel cell car*. This suggests that a significant share of citizens are open to buying an electric car. Most carmakers are forecasting 20-25% sales of electric cars by 2025 and the survey results backup their confident forecasts. Italians and Spaniards (both 48%) are most likely to say that they would be somewhat likely to buy or lease an electric or fuel cell car as their next vehicle, while the French and Germans (24 and 25% respectively) are least likely to say the same thing.

The survey explored why consumers are reluctant to buy electric cars and found the biggest barrier to the take up of electric cars remains their high price, which was identified by two-thirds (65%). Price was of the greatest concern amongst Poles (72%) and Hungarians (75%); and it was of the least concern for Germans (57%), Spaniards (58%) and Swedes (58%). Around four in five new cars sold in the EU are sold in western Europe, so in practice the high price concern of Eastern Europeans is unlikely to have any significant market impact.

Main (two) reasons that the next car buy/lease will not be an electric or fuel cell car?	Average	Belgium	Poland	Sweden	Hungary	France	Germany	Great Britain	Italy	Spain
The cars are still too expensive	65%	67%	72%	58%	75%	69%	57%	60%	62%	58%
There is a lack of recharging points	38%	39%	41%	25%	26%	36%	41%	41%	49%	46%

I do not know enough about electric cars to buy one	14%	12%	13%	20%	9%	12%	11%	18%	18%	16%
The range of the cars are not appropriate to my needs	12%	15%	13%	14%	3%	13%	18%	16%	6%	9%
I prefer to drive a car with an engine	10%	7%	9%	13%	6%	12%	14%	10%	11%	8%
There is a lack of choice/too few models in the market	9%	8%	8%	9%	8%	8%	7%	8%	15%	11%
Other reason	13%	20%	6%	22%	14%	13%	14%	14%	5%	10%

The second biggest barrier expressed through the survey is the availability of recharging points, a concern expressed by 38% of those surveyed. The concern is greatest in Italy (49%) and Spain (46%) and least in Sweden (25%). There is a considerable body of [evidence](#) that shows that there is already a sufficient number of recharging points in most countries for the number of electric cars on the road. Furthermore, just 5% of recharging happens at public recharging sites. Nevertheless this survey outcome suggests there is a clear perception amongst the public that recharging is an issue and this will undoubtedly have an impact upon market acceptance and uptake and therefore needs to be addressed.

The much mentioned concern of range anxiety (fear that the car will run out of charge) is only mentioned by 12% of those surveyed. This suggests that it has either been overstated as a worry or the longer range cars now available have addressed some of the concern. With many more models about to be launched on the market (there will be [over 100](#) electric cars on the road by 2021) citizens also seems relatively unconcerned about the choice of models available - although availability remains a significant current issue. Only a minority of citizens surveyed mentions their preference to drive a car with an engine (10%) as a main reason not to buy or lease an electric car.

Given that price is the biggest concern, it is not surprising that citizens are overwhelmingly in favour of governments providing incentives to make it more affordable for the public to purchase cleaner cars that run on electricity or hydrogen. On average, almost nine in 10 Europeans (88%) are in favour, with the greater proportion of Hungarians (94%), Italians (94%) and Spaniards (92%) feeling this way. Germans are least likely to support government incentives, but even here more than three-quarters (77%) are in favour.

Citizens that support	Average	Belgium	Poland	Sweden	Hungary	France	Germany	Great Britain	Italy	Spain
Providing incentives to make it more affordable for the public to purchase cleaner-fuel cars that run on electricity or hydrogen	88%	89%	88%	81%	94%	88%	77%	89%	94%	92%

### 3. Citizens expect the EU to act to ensure cars become cleaner

Citizens are also clear that there is an important role for the European Union (EU) and national governments to tackle rising transport CO2 emissions. Despite reservations that their next car will be electric, a surprisingly high share of Europeans surveyed (60%) think that the government should **require** carmakers to sell electric cars in their country. There's strong support for this idea in Spain (83%), Poland (79%), Italy (69%) and Britain (61%). Germans, French, Hungarians and Belgians are split while a small majority of Swedes oppose the idea.

Do you think governments should require cars companies to sell electric cars in [COUNTRY]?	Average	Belgium	Poland	Sweden	Hungary	France	Germany	Great Britain	Italy	Spain
Yes	60%	51%	79%	43%	52%	57%	48%	61%	69%	83%
No	40%	49%	21%	57%	48%	43%	52%	39%	31%	17%

A quarter (25%) of those surveyed also want *the EU to mandate that all new cars must have zero emissions by 2030*. This is substantially more than the European Commission is proposing (that by 2030 30% of cars are low and zero emissions but there is no requirement on manufacturers to comply). Italians (38%) and Spaniards (35%) provided the strongest support for mandating zero-emission cars; whilst the Swedes were the least in favour (19%).

Over half (55%) of those surveyed want *the EU should set ambitious targets that are achievable to reduce CO2 emissions from new cars in 2030*. In total 80% of citizens surveyed support ambitious targets to cut emissions from new cars. The current debate is very focused on job impacts of the proposed rules, but just 11% say that *the EU should limit their targets to ensure that there is no more than a minimal impact on jobs in the car and oil industries* and 9% say *there should be no rules*. Overall, a strong majority is in favour of ambitious legislation.

	Total	Belgium	Poland	Sweden	Hungary	France	Germany	Great Britain	Italy	Spain
The EU should set ambitious targets that are achievable to reduce CO2 emissions from new cars in 2030	55%	60%	59%	59%	59%	53%	55%	57%	48%	46%
The EU should mandate that by 2030, all new cars must have zero emissions	25%	23%	20%	19%	27%	25%	21%	18%	38%	35%
The EU should limit their targets to ensure that there is no more than a minimal impact on jobs in the car and oil industries	11%	8%	11%	10%	9%	10%	12%	12%	9%	15%
The EU should not set rules that require cars to be less polluting and leave this to industry	9%	9%	11%	13%	5%	12%	12%	13%	6%	5%

#### 4. Citizens support wider action to tackle emissions from cars

The survey also asked a number of questions about other measures citizens support to reduce vehicle emissions in addition to vehicle legislation.

- Eight in 10 Europeans surveyed (83%) support increasing public transport through subsidies. There was a notable difference in support between Germans (70%), who already enjoy a good public transport network and Hungarians (95%) and Italians (90%), who don't.
- The most unpopular measure to reduce transport CO2 emissions was raising fuel taxes. Just one third of Europeans surveyed (35%) supported fuel tax hikes with the British (47%) the most accepting and Poles (26%) and Italians (27%) the least.

Citizens that support	Average	Belgium	Poland	Sweden	Hungary	France	Germany	Great Britain	Italy	Spain
Requiring transport fuel providers to gradually increase the amount of clean, low-carbon fuels they provide	88%	89%	88%	83%	94%	89%	77%	89%	88%	93%
Requiring that car companies increase the fuel efficiency of the cars and vans they make	89%	88%	89%	84%	92%	88%	82%	91%	94%	92%
Providing incentives to make it more affordable for the public to purchase cleaner-fuel cars that run on electricity or hydrogen	88%	89%	88%	81%	94%	88%	77%	89%	94%	92%
Providing tax incentives to encourage technological innovation that will develop new transport fuel alternatives	87%	84%	84%	85%	94%	85%	78%	86%	92%	90%
Increasing public transport through subsidies	83%	78%	77%	82%	95%	84%	70%	82%	90%	88%
Raising fuel taxes to encourage use of more fuel-efficient cars and less car use	35%	37%	26%	38%	30%	31%	36%	47%	27%	39%

## 5. Conclusions

Overall, there's strong public support across nine EU countries (Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Spain, and Sweden) for public policy to clean up transport now. Even a radical measure like mandating that all cars would be zero-emission in 2030 is supported by a quarter of the citizens surveyed. Both EU Member states and the European Parliament are due to finalise their positions on car and van CO2 regulations for 2025 and 2030 in the next few weeks. The clear message from this survey is that citizens expect their government to be far more ambitious about driving the shift to low and zero-emission vehicles than any of the proposals seriously being considered.

The European Commission proposal in November 2017 recommended a 30% reduction from new cars in emissions from 2020 to 2030 but a quarter of citizens are seeking a complete phase-out of emitting vehicles by this date. While there are a range of issues to be balanced in any policy choices, it is clear that citizens are seeking ambition in the actions of their elected representatives.

## Further information

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