EAFO Consumer monitor 2022

The e-volution, POLIS 19/06/2023

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European Commission | European Alternative Fuels Observatory

EAFO Consumer monitor 2022

Approach & results

- **Support policy makers EU: AFIR national/regional level**
- Consumers’ intentions to adopt BEVs
- e-mobility and recharging behaviour
- Challenges & needs

10 countries

Austria, Belgium, Germany Denmark, France, Hungary, Italy, Netherlands, Slovenia, Spain

BEV	non-BEV	TOTAL
1,378	**16,611**	**17,989**

EU aggregated results

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Key results examples & policies

- **The ‘EU BEV driver’**
- **Driving a BEV: BEV and non-BEV drivers ‘pros & cons’**
- **BEV drivers and public recharging infrastructure/AFIR**
  - Use
  - Needs
  - Issues
- **How can the EAFO consumer monitor support you?**
  - Understanding (potential) consumer needs
  - Identify opportunities, evaluate impact
  - Have a look, have a say!

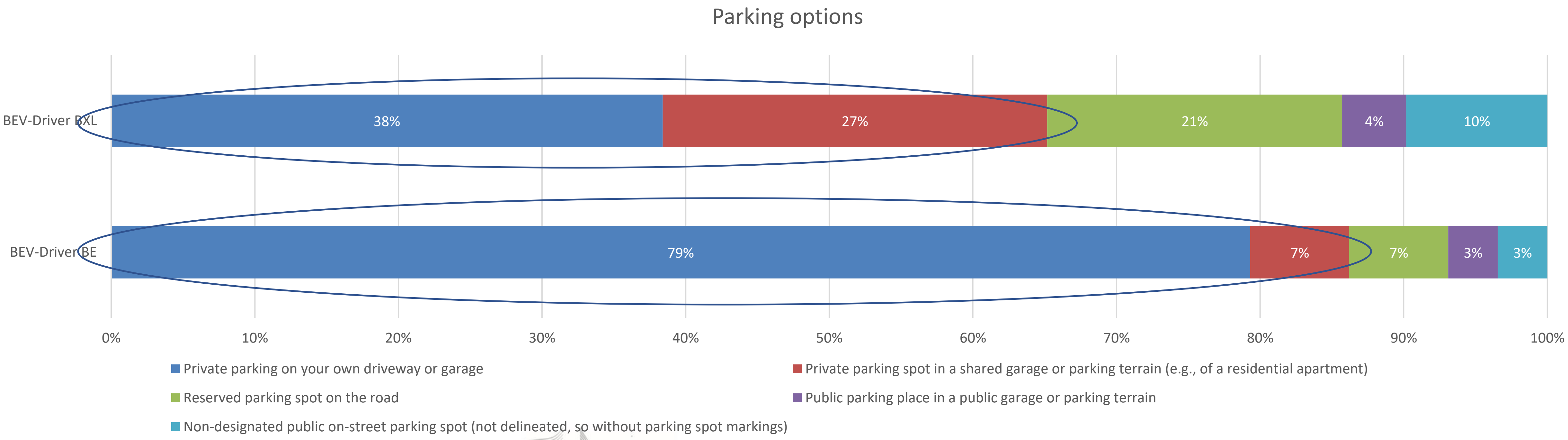
The EU BEV driver

- 81%: Male
- 51%: 33-55 years old
- 39%: 2,000-3,999 €
- 50%: University or other higher education
- 62%: Detached house

Need to consider groups less represented: females, income, education, accommodation..

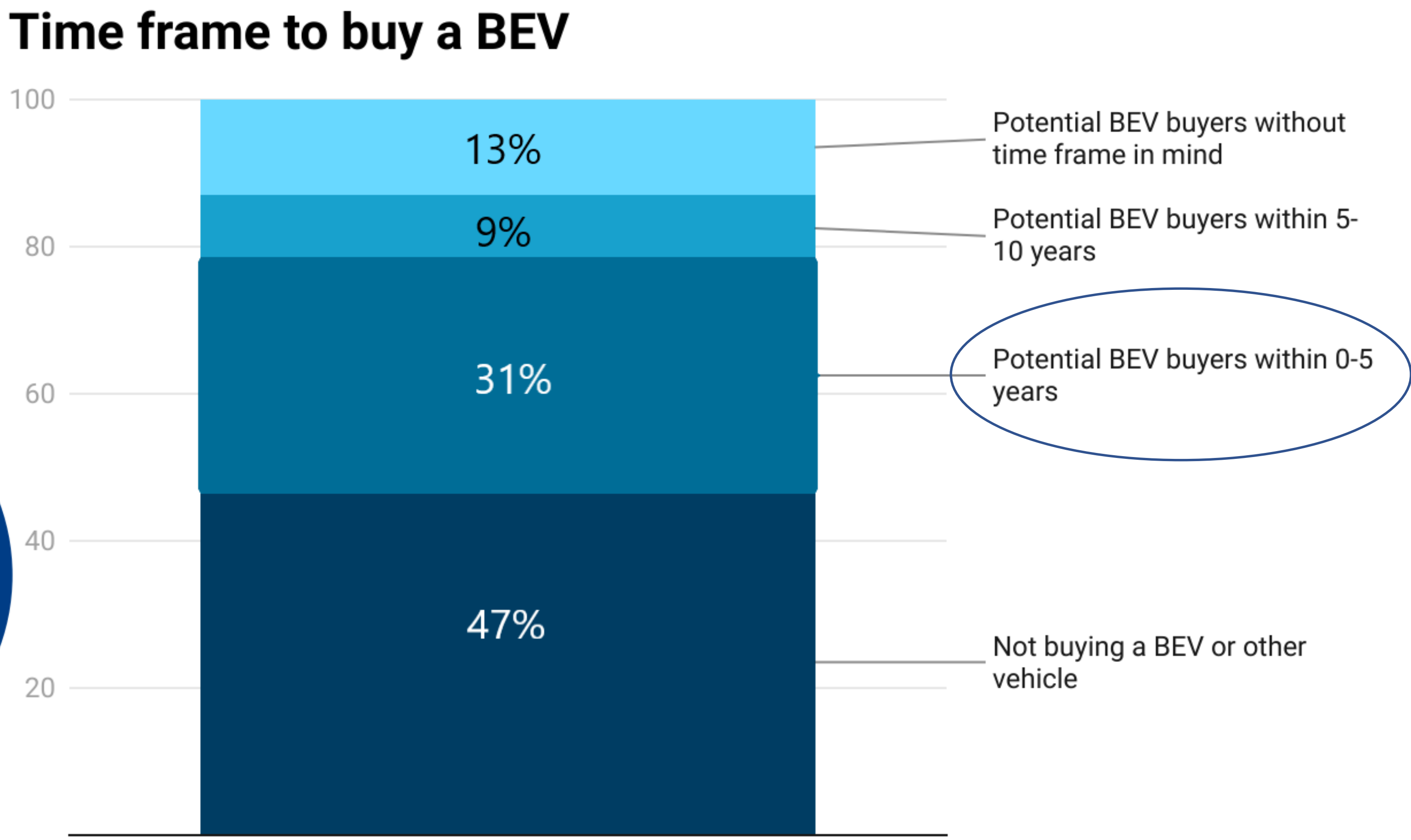
National vs. local level (BE vs BXL)

- Car sharing (BXL)
- Frequency use public recharging infrastructure
- **Parking options BEV-drivers**



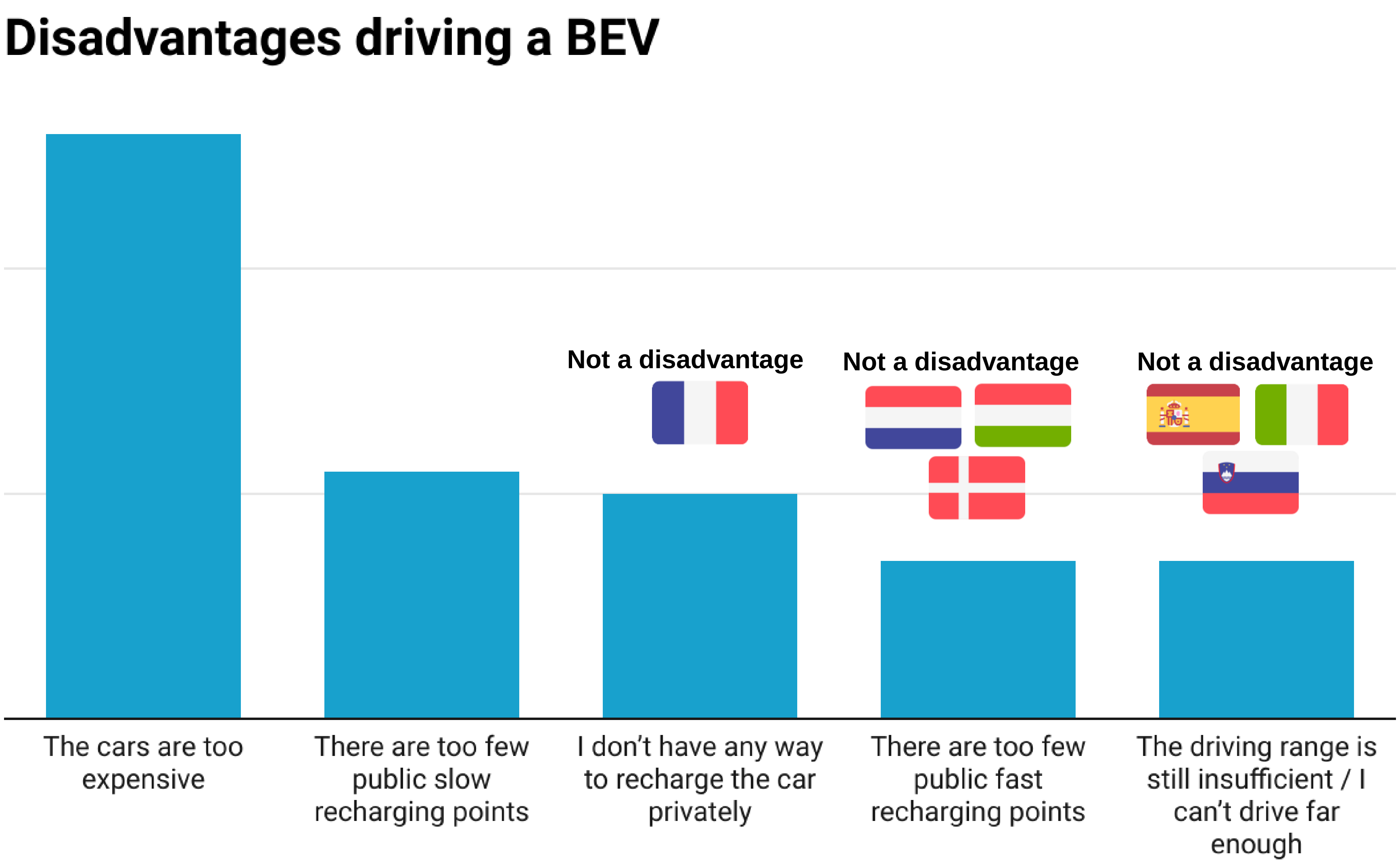
EAFO Consumer monitor (EU results)

BEV and non-BEV drivers pros



EAFO consumer monitor (EU results)

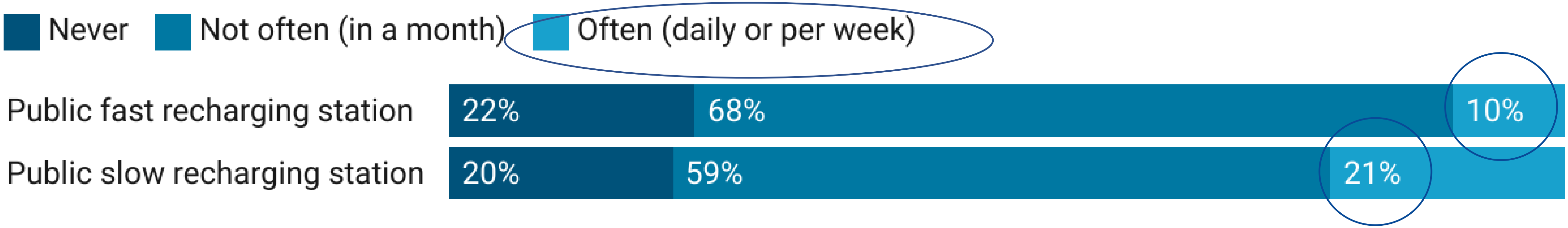
Top-5 disadvantages BEVs



EAFO consumer monitor (EU results)

BEV drivers, public recharging infrastructure: AFIR

Recharging infrastructure use frequency



No private recharge?

Private parking

78% **83%**

Charging at home often used (station/wallbox)

51% **59%**

Public slow often used **53%** **47%** **35%**

Public fast often used **22%** **28%** **16%**

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EAFO consumer monitor (EU results)

BEV drivers, public recharging infrastructure: AFIR

Important characteristics public recharging infrastructure

	Ranking
Recharging speed, so I can get the quickest possible recharge	1
Easy access and payment via my recharging subscription (pass/app)	2
Possibility to pay per kWh only	3
Short/no waiting time to access the recharging point	4
Clear and transparent price information	5
Convenient on the spot payment options (e.g. debit/ credit card)	6
Possibility to do something else while your car recharges/amenities on site	7
Integrated cable	8

Public recharging points main issues

Not a clear overview public recharging points vicinity
Don't know how long it will take to fully recharge my car
Not sufficient choice between operators/mobility providers

Article 18

Data provisions

1. Member States shall appoint an Identification Registration Organisation ('IDRO'). The IDRO shall issue and manage unique identification ('ID') codes to identify, at least operators of recharging points and mobility service providers, at the latest one year after the date referred to in Article 24.

2. Operators of publicly accessible recharging and refuelling points or, in accordance with the arrangement between them, the owners of those points, shall ensure the availability of static and dynamic data concerning alternative fuels infrastructure operated by them and allow accessibility of that data through the National Access Points at no cost. The following data types shall be made available:

(a) static data for publicly accessible recharging and refuelling points operated by them:

(i) geographic location of the recharging or refuelling point,

(ii) number of connectors,

(iii) number of parking spaces for people with disabilities,

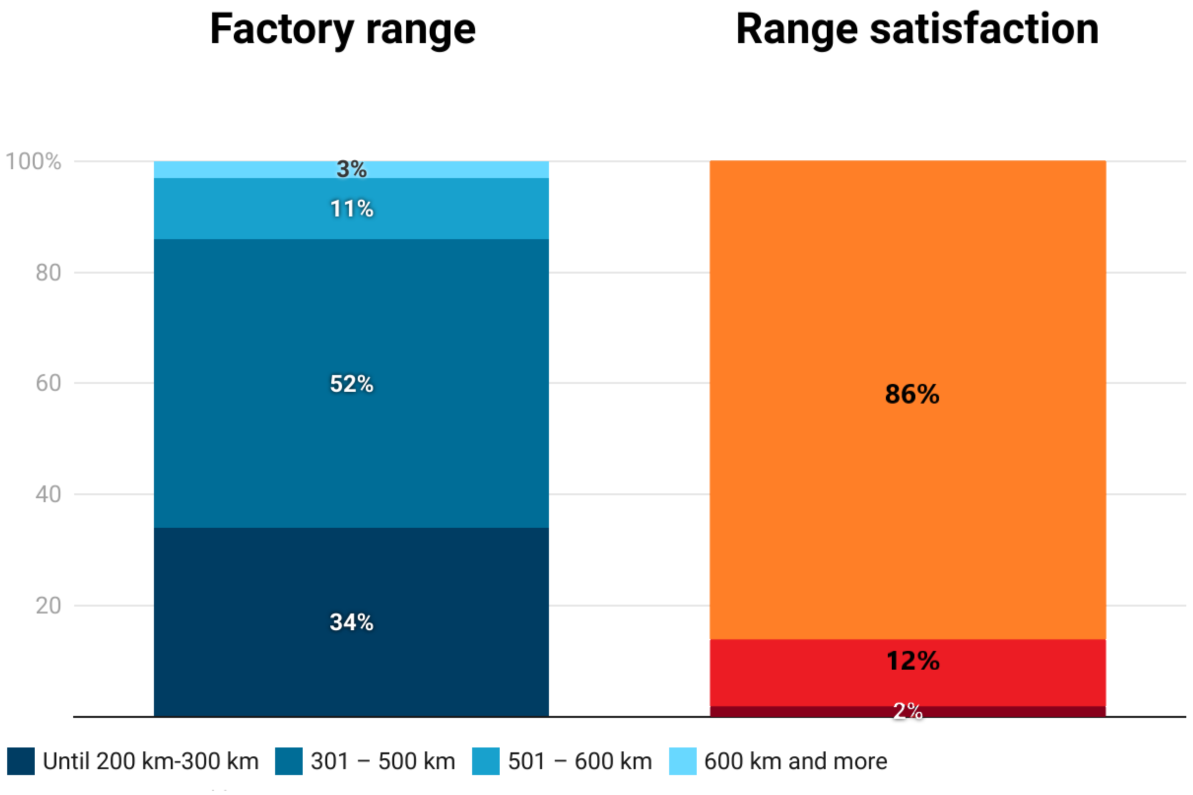
EAFO consumer monitor key facts

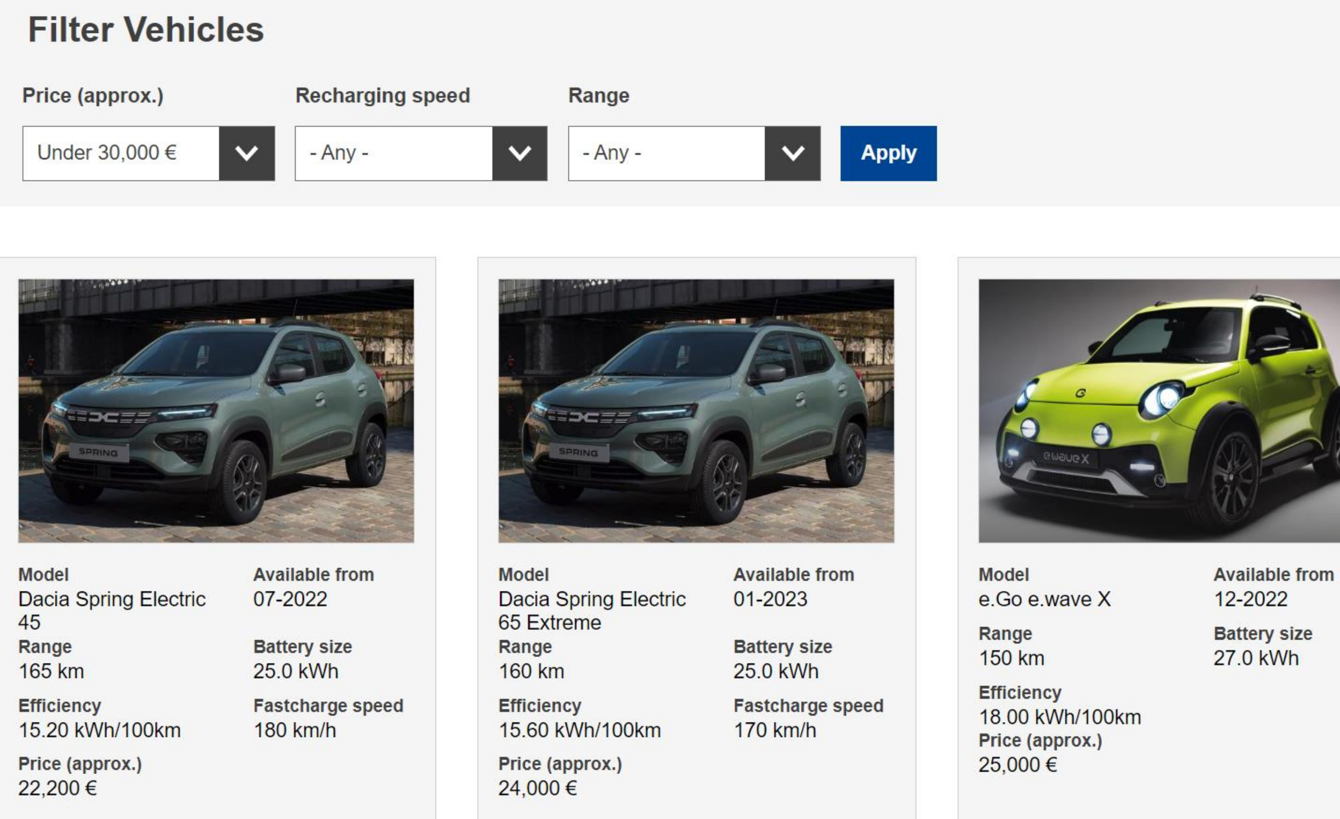
Supporting electromobility policies & strategies

Understand (potential) consumers’ needs:

a. Batteries and/or driving range

b. Costs comparison with fossil fuel cars: 44% BEV purchase price 10,000-30,000 €





EAFO consumer monitor key facts

Supporting electromobility policies & strategies

Understand (potential) consumers needs:

a. Batteries and/or driving range

b. Costs comparison with fossil fuel cars: TCO, leased/second-hand BEVs?

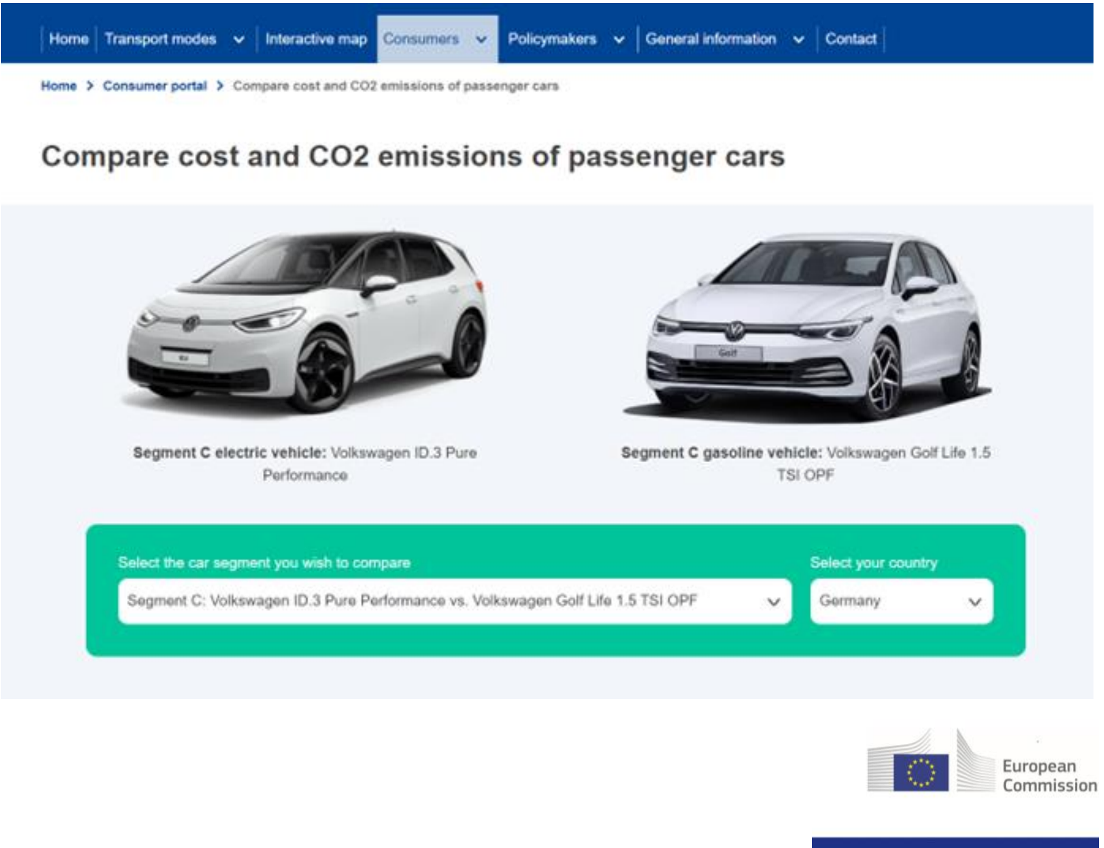


Table 8: Mobility & ownership of car BEV driver (merged datasets)

Country	3 years to 5 years or longer as BEV driver	BEV drivers using vehicle daily / several times a week	Leased BEV (business or private)	BEV company car (if employee)	Privately owned BEV	New BEV	Second-hand BEV
Austria	42%	95%	29%	11%	60%	73%	27%
Belgium	11%	90%	17%	28%	55%	60%	40%
Denmark	15%	90%	3%	3%	94%	50%	50%
France	46%	99%	20%	3%	77%	77%	23%
Germany	20%	92%	26%	9%	65%	79%	21%
Hungary	47%	99%	16%	9%	75%	49%	51%
Italy	28%	91%	16%	13%	71%	87%	13%
Netherlands	28%	97%	21%	16%	63%	70%	30%
Slovenia	45%	93%	61%	8%	31%	60%	40%
Spain	63%	97%	4%	12%	84%	77%	23%
EU 10 countries	38%	97%	22%	8%	70%	67%	33%

EAFO consumer monitor key facts

Supporting electromobility policies & strategies

Identify opportunities, evaluate impact

a. Second-hand BEVs
b. Affordable leasing options
c. New technologies
d. Less represented groups
e. **Financial incentives**

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Table 7: Barriers and opportunities BEV driving (general population)

Country	Main disadvantage	% BEV potential drivers	Not aware of subsidies for electric driving	Existing financial incentive (end 2022)[9]
Austria		48%	34%	VAT deduction and exemption from tax for BEVs. No CO_2 tax. Purchase subsidies.
Belgium		47%	54%	Limited or exemption from registration and ownership taxes at the regional level. Federal deduction of invest-ments for companies. Limited or exemption on road taxes.
Denmark		56%	49%	Registration tax reductions. Company car tax deduction. Taxes on ownership are based on CO2 emissions.
France		40%	35%	Registration tax exemption. BEVs, FCEVs (fuel cell electric vehicles), and PHEVs (Plug-in Hybrid Electric Vehicles -with a range of > 50km) are exempt from the mass-based malus. Purchase subsidies. Exemption from CO_2-based tax components.

EU-AFIR

- Art. 20 Identification & data provision
- Choice between operators and mobility service providers
- Investing & funding innovation and deployment

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1 EU report, 10 country reports, more detailed results & policies

https://alternative-fuels-observatory.ec.europa.eu/

THANK YOU!