

Rising Energy Costs: Impacts on Attitudes and Adoption of EVs and Heat Pumps

Public opinion survey across six European
countries

Global report

June 2026



Research methodology

International study conducted by Verian for the European Climate Foundation

Countries



Survey conducted in the following six countries:

- United Kingdom
- France
- Germany
- Poland
- Italy
- Spain

Samples

In each country a sample of 1,000 respondents was surveyed, representative of the population aged 18 and over.

Representativeness has been ensured using **quota sampling**, based on:

- Gender by Age
- Education level (or socio-professional category in France)
- Region



Data collection method



- The survey was conducted online using an access panel.

Fieldwork dates

- Fieldwork has been conducted between 29 May and 3 June 2026

For selected questions, results are also presented as aggregated averages: a 6-country weighted average, and, where relevant, a 5-country EU weighted average (excluding the UK)

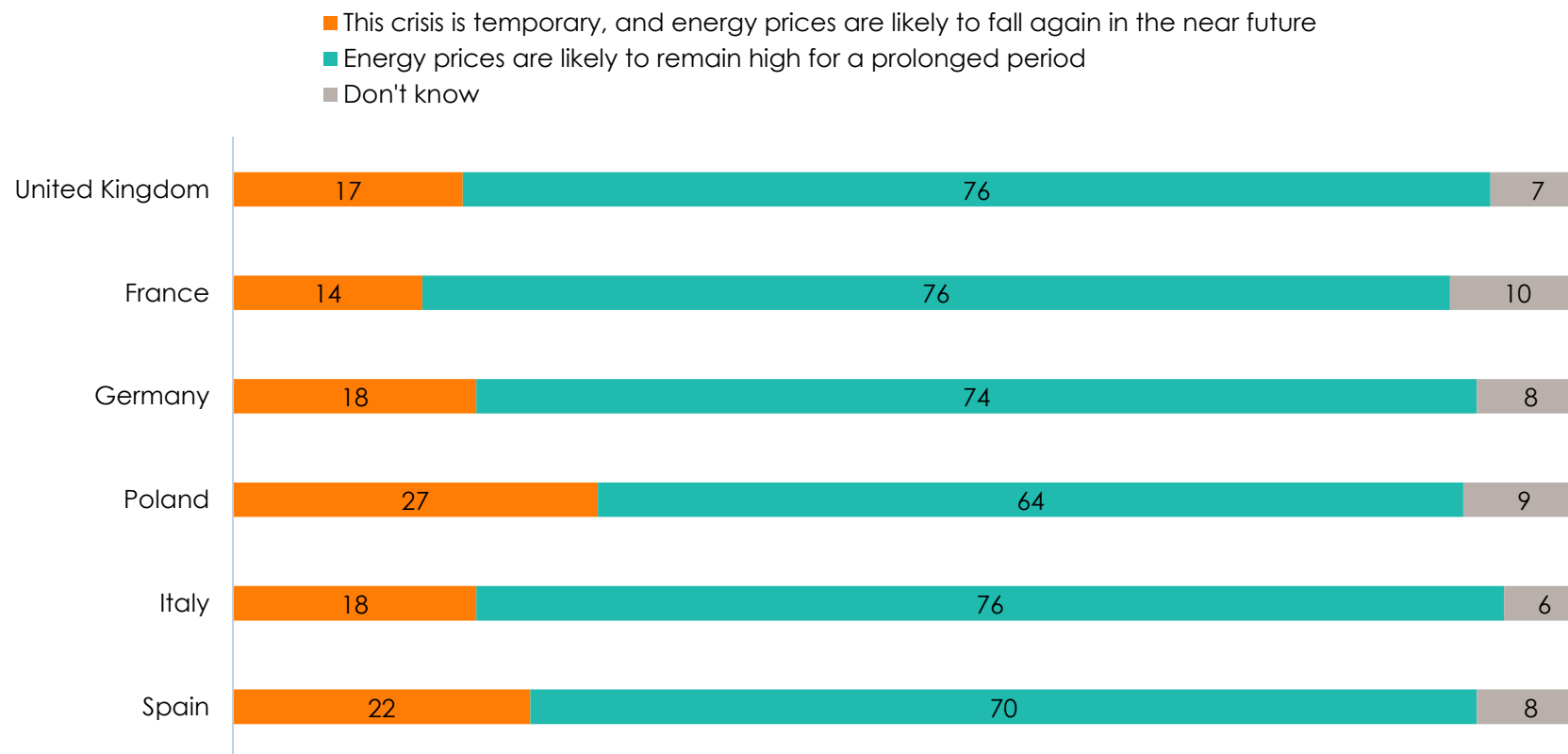
In both cases, results are weighted to reflect the relative importance of each country within the overall sample.

1.

Context: a persistent energy crisis is reinforcing support for reducing fossil fuel dependence

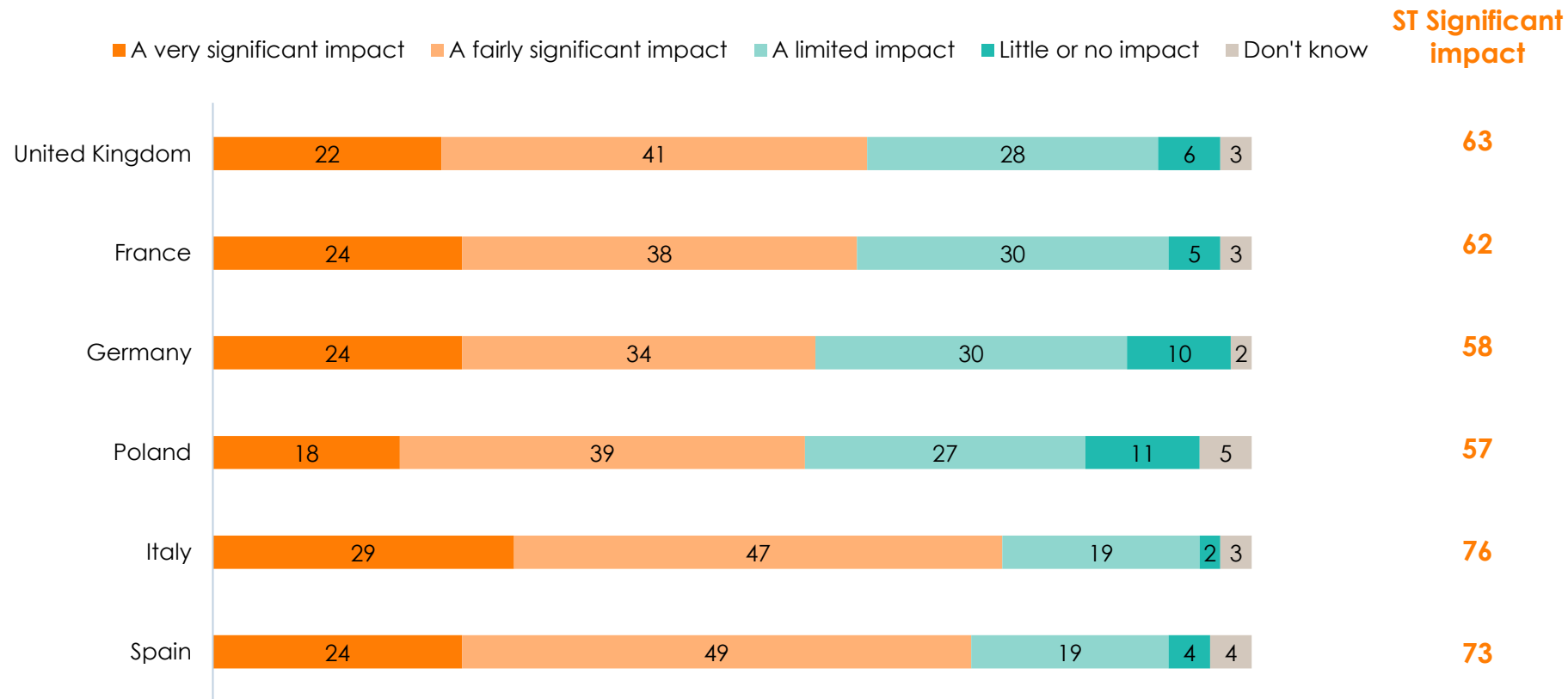
Strong consensus: energy prices are expected to remain high over time

Q1 - The United States and Israel's attack against Iran over the past few weeks has created an energy crisis, leading to rising energy prices (oil, gas...) and raw material costs. In your opinion...



The energy crisis is already heavily impacting household budgets across Europe

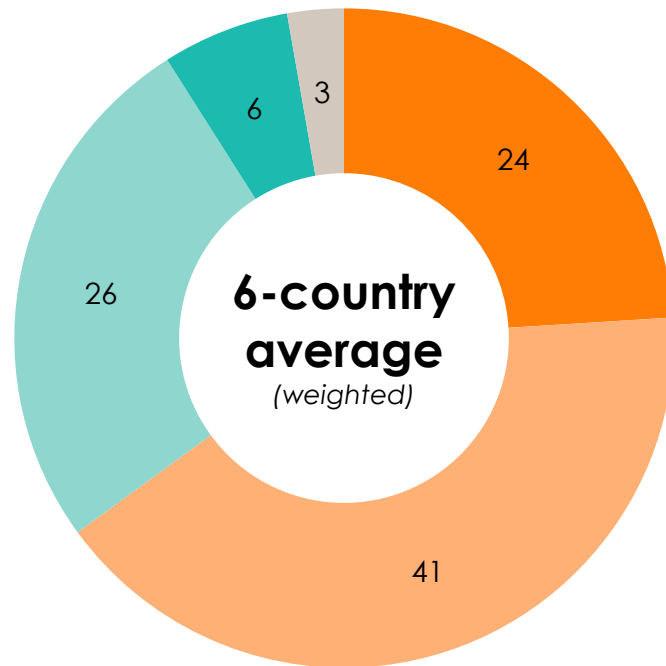
Q2 - Since the beginning of the war in Iran, would you say that the increase in the cost of living, including energy and fuel prices, has had on your household budget :



Financially vulnerable households are disproportionately affected by the crisis

Q2 - Since the beginning of the war in Iran, would you say that the increase in the cost of living, including energy and fuel prices, has had on your household budget :

■ A very significant impact
 ■ A fairly significant impact
 ■ A limited impact
 ■ Little or no impact
 ■ Don't know

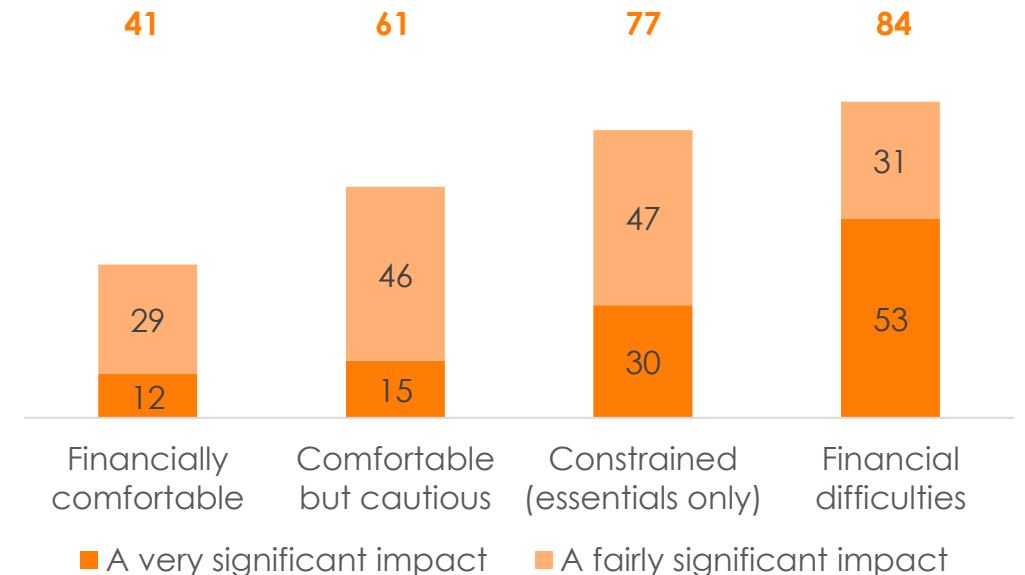


ST Significant impact

65



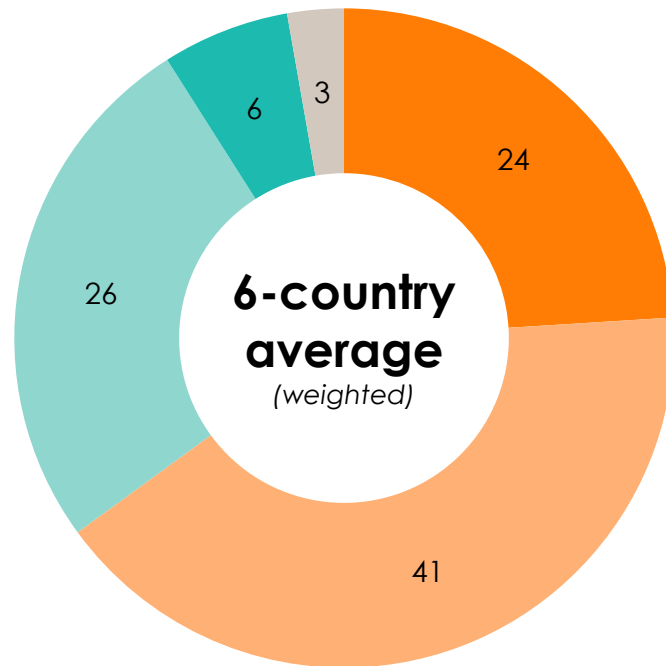
By household financial situation



Heavy car users are also more affected by rising energy costs

Q2 - Since the beginning of the war in Iran would you say that the increase in the cost of living, including energy and fuel prices, has had on your household budget :

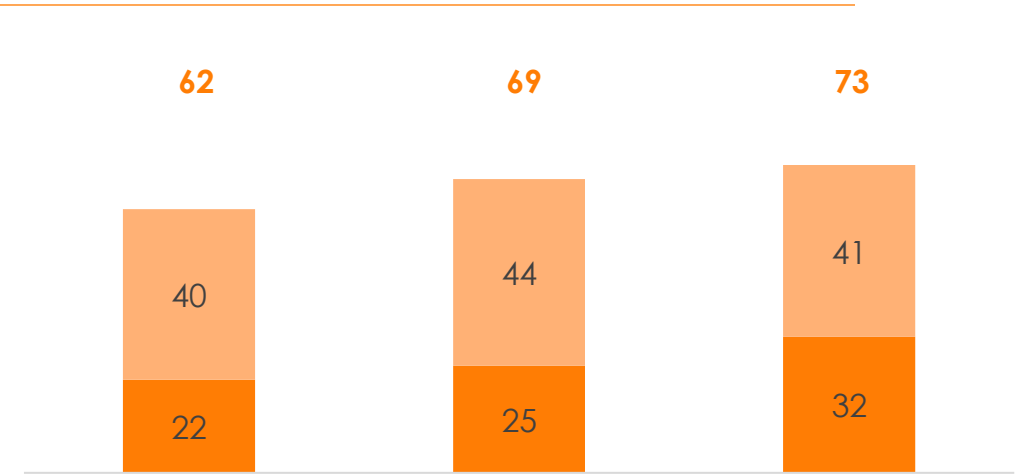
■ A very significant impact ■ A fairly significant impact ■ A limited impact ■ Little or no impact ■ Don't know



ST Significant impact



By weekly distance driven



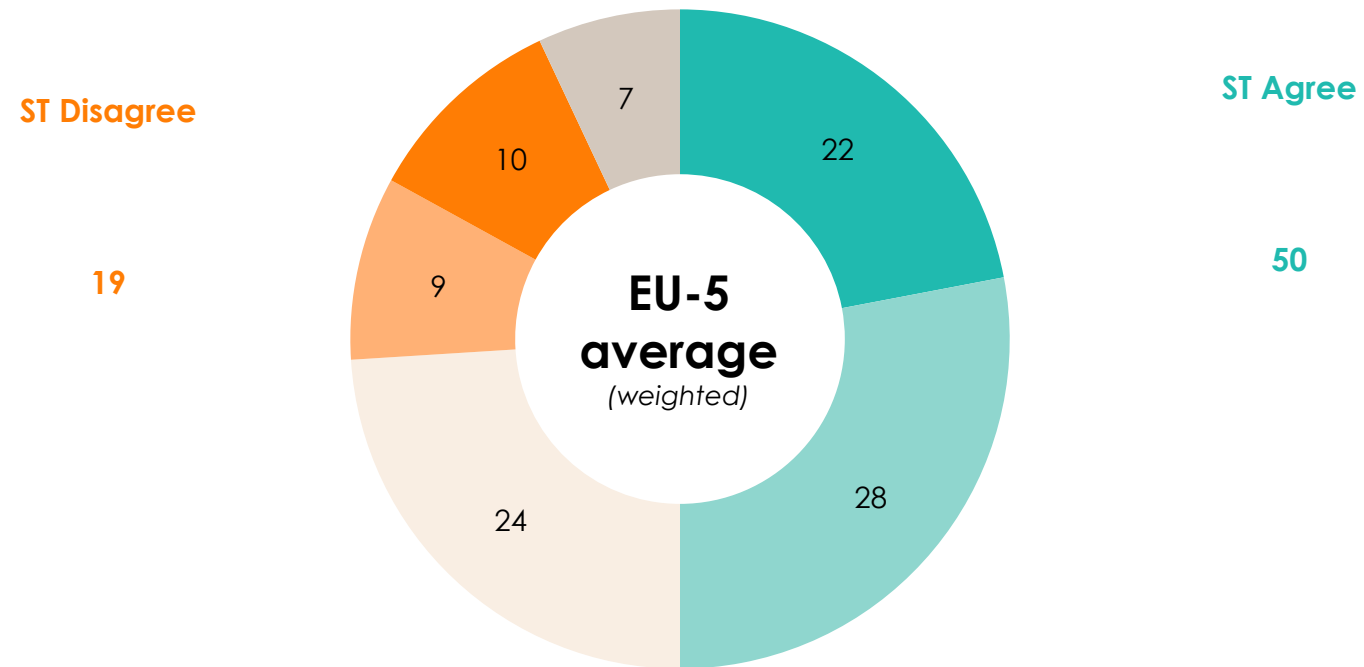
Less than 75 km Between 75 and 300 km Over 300 km

■ A very significant impact ■ A fairly significant impact

Broad public support for reducing dependence on fossil fuels at EU level

Q3 - Do you agree or disagree that the European Union should gradually reduce our dependence on fossil fuel-powered vehicles over the coming decade?

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

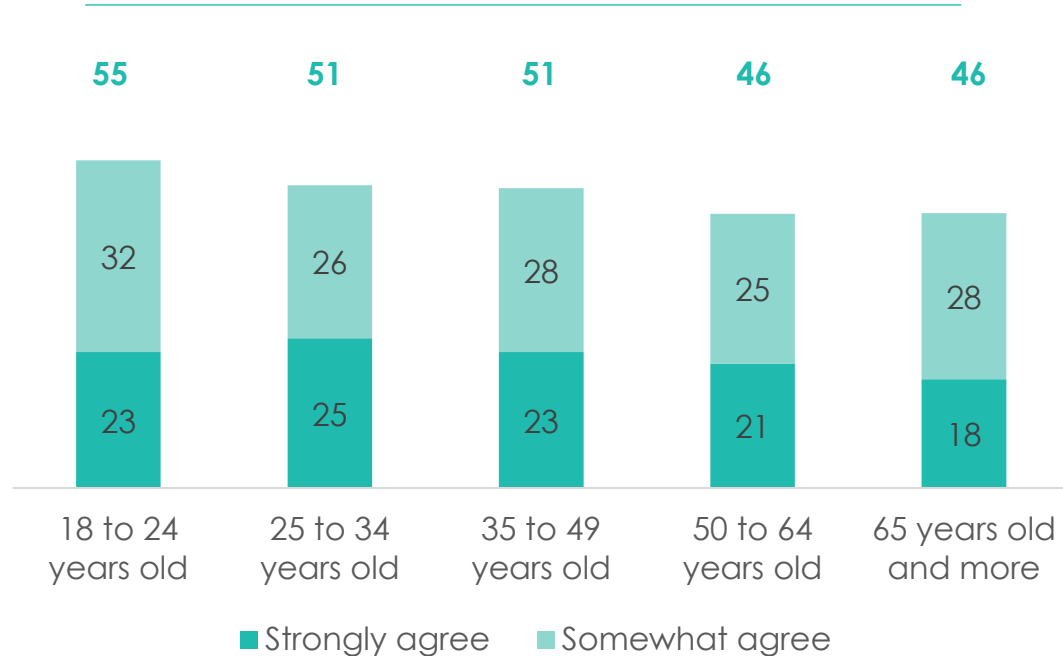


Support is stronger among younger respondents, but significantly lower among right-leaning voters

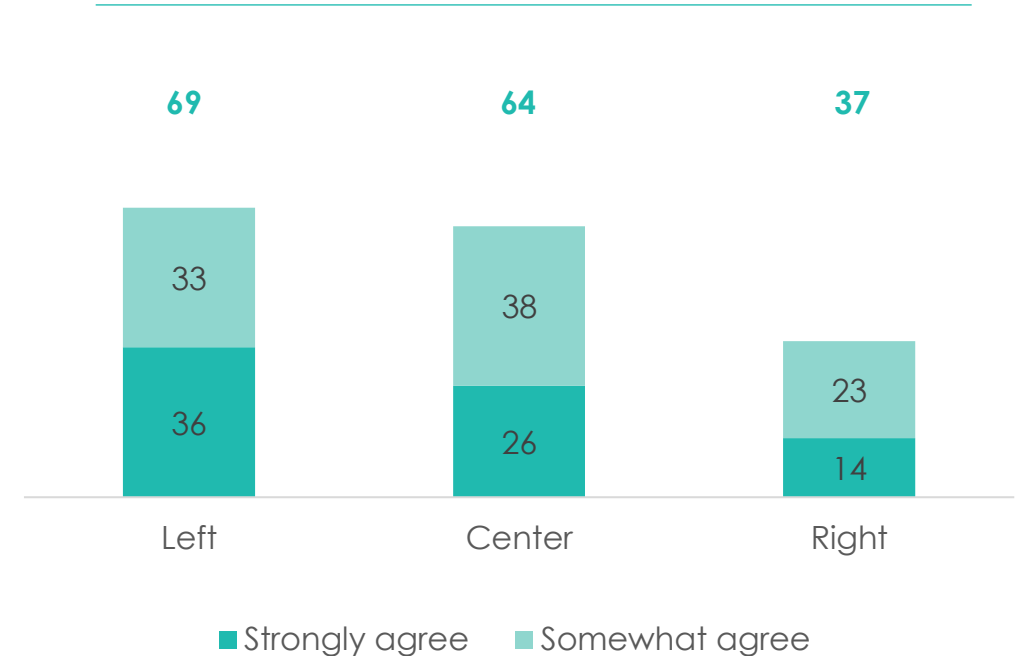
Q3 - Do you agree or disagree that the European Union should gradually reduce our dependence on fossil fuel-powered vehicles over the coming decade?

EU-5 average (weighted)

% ST Agree by age

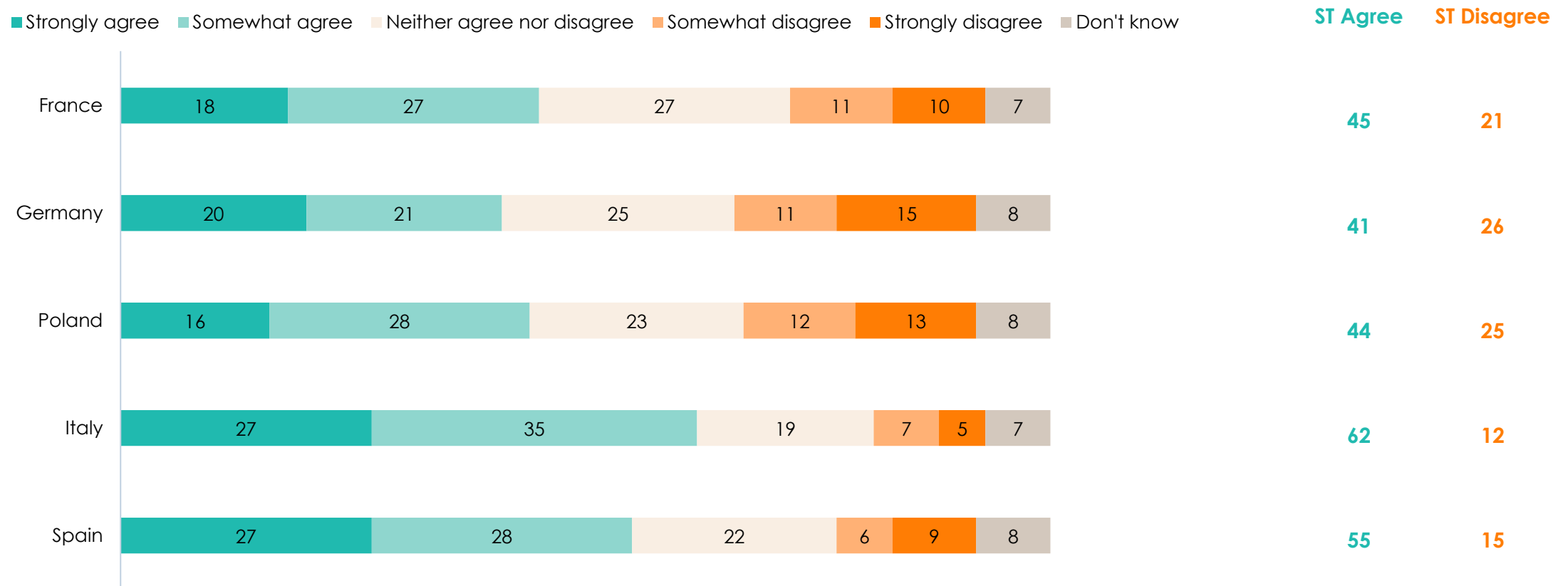


% ST Agree by voting intentions



Support is highest in countries most impacted by rising costs (Spain, Italy), while opposition remains limited across all countries

Q3 - Do you agree or disagree that the European Union should gradually reduce our dependence on fossil fuel-powered vehicles over the coming decade?

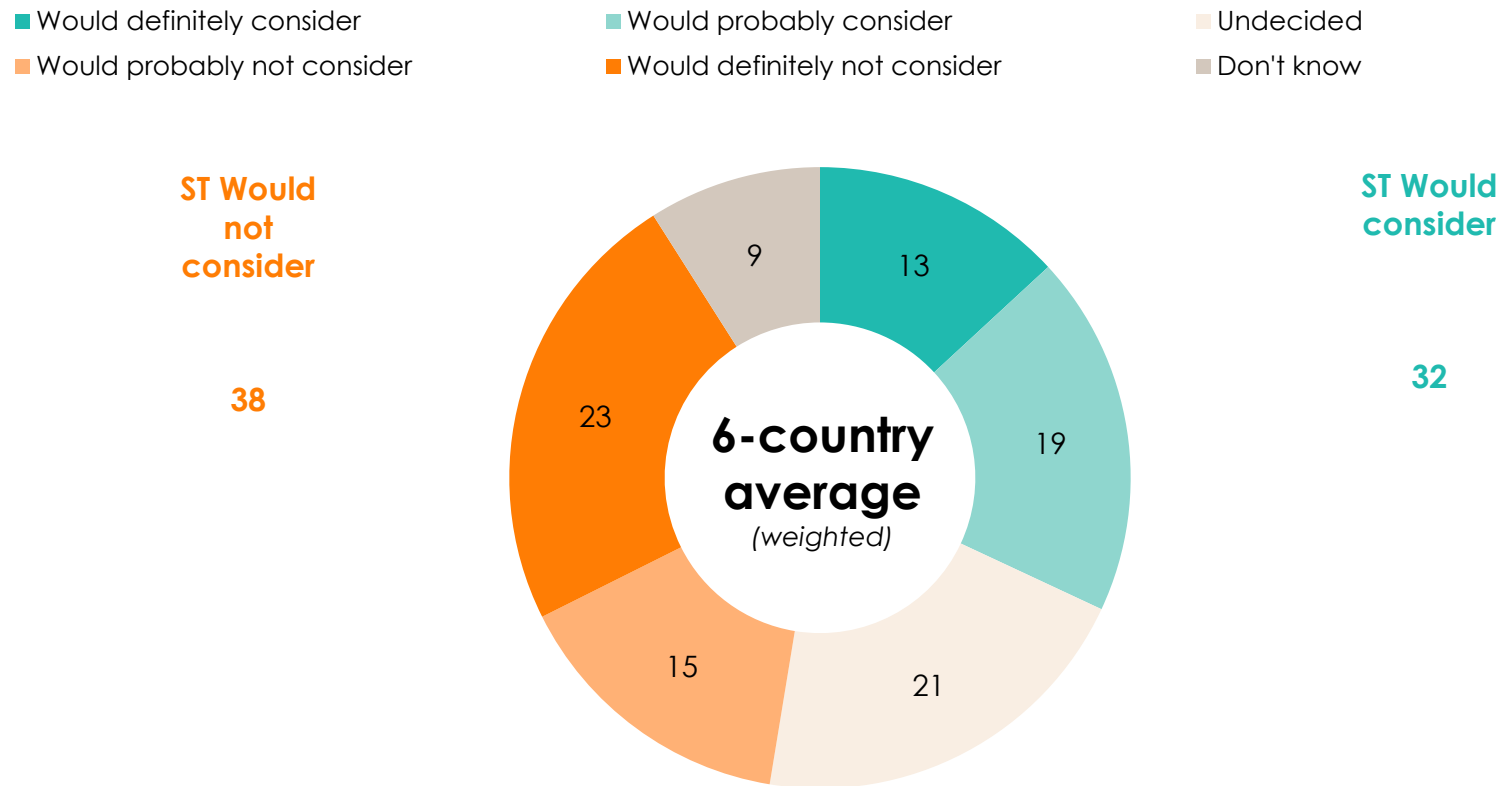


2.

Electric vehicles: growing interest but persistent barriers

EV purchase intentions remain divided and often polarized

Q4 - Thinking about the next car you will buy or rent, to what extent would you consider buying a fully electric vehicle (ie not a hybrid)?

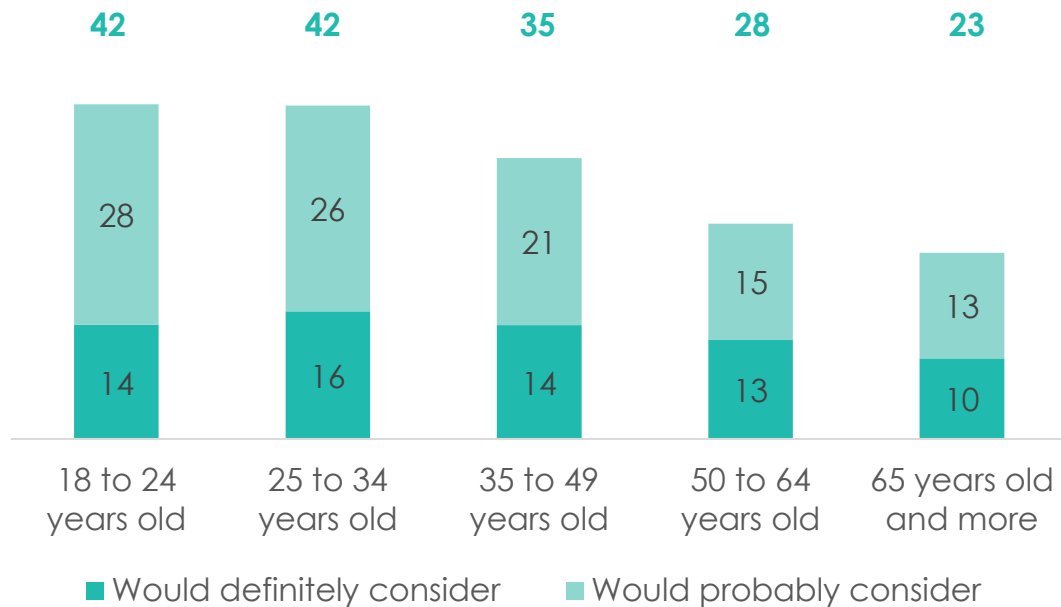


A clear generational and political divide in EV adoption intentions

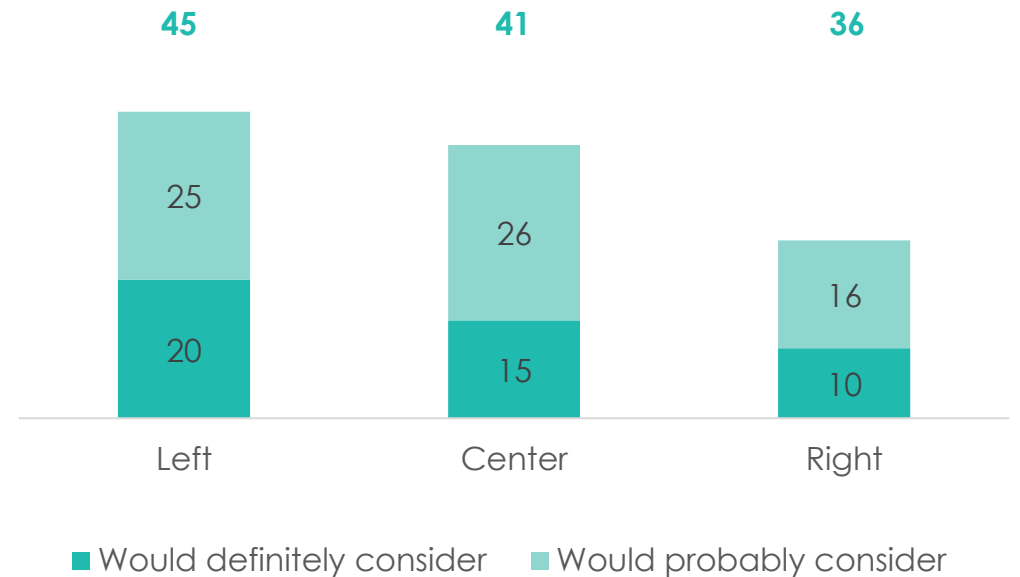
Q4 - Thinking about the next car you will buy or rent, to what extent would you consider buying a fully electric vehicle (ie not a hybrid)?

6-country average (weighted)

% ST Would consider by age

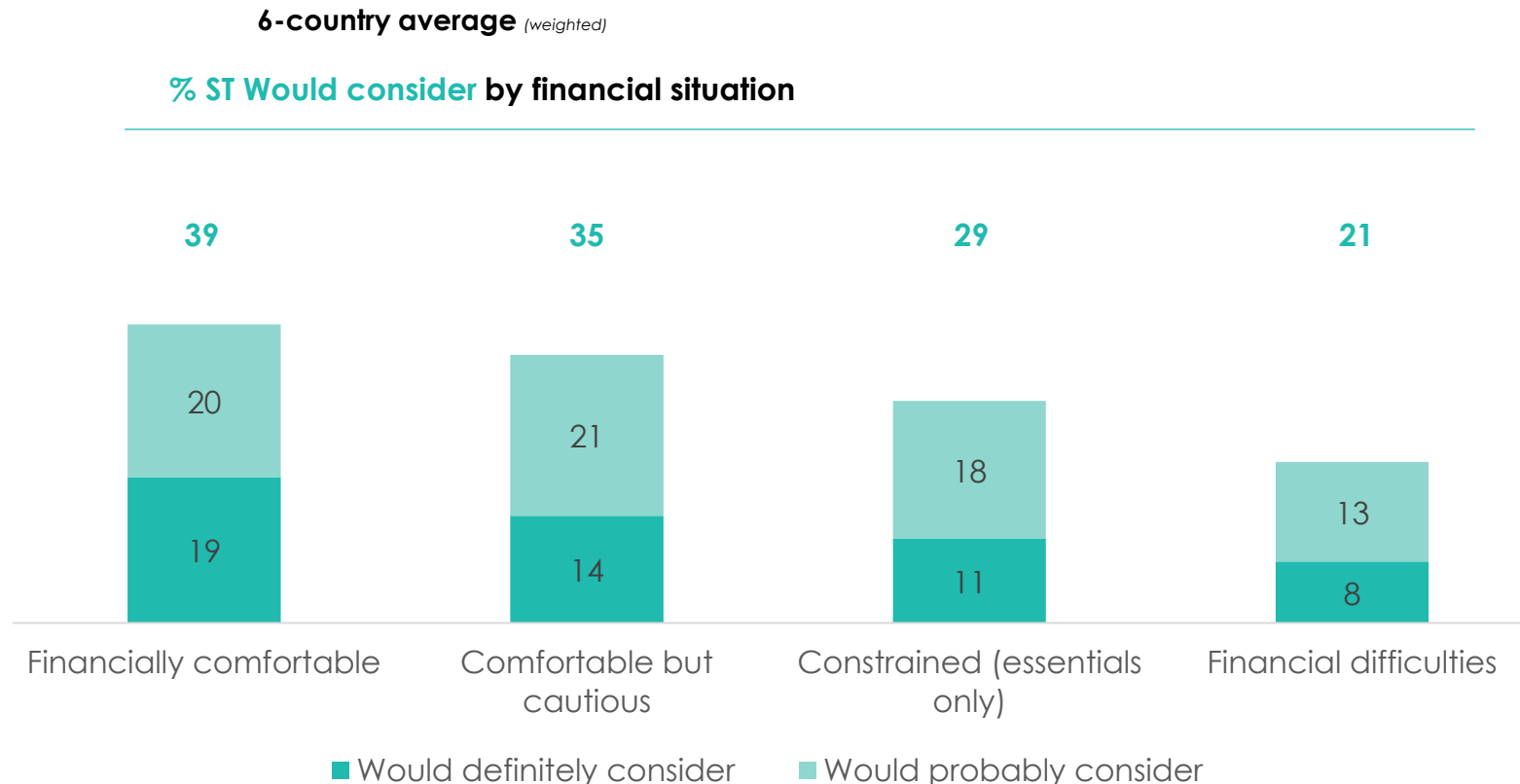


% ST Would consider by voting intention



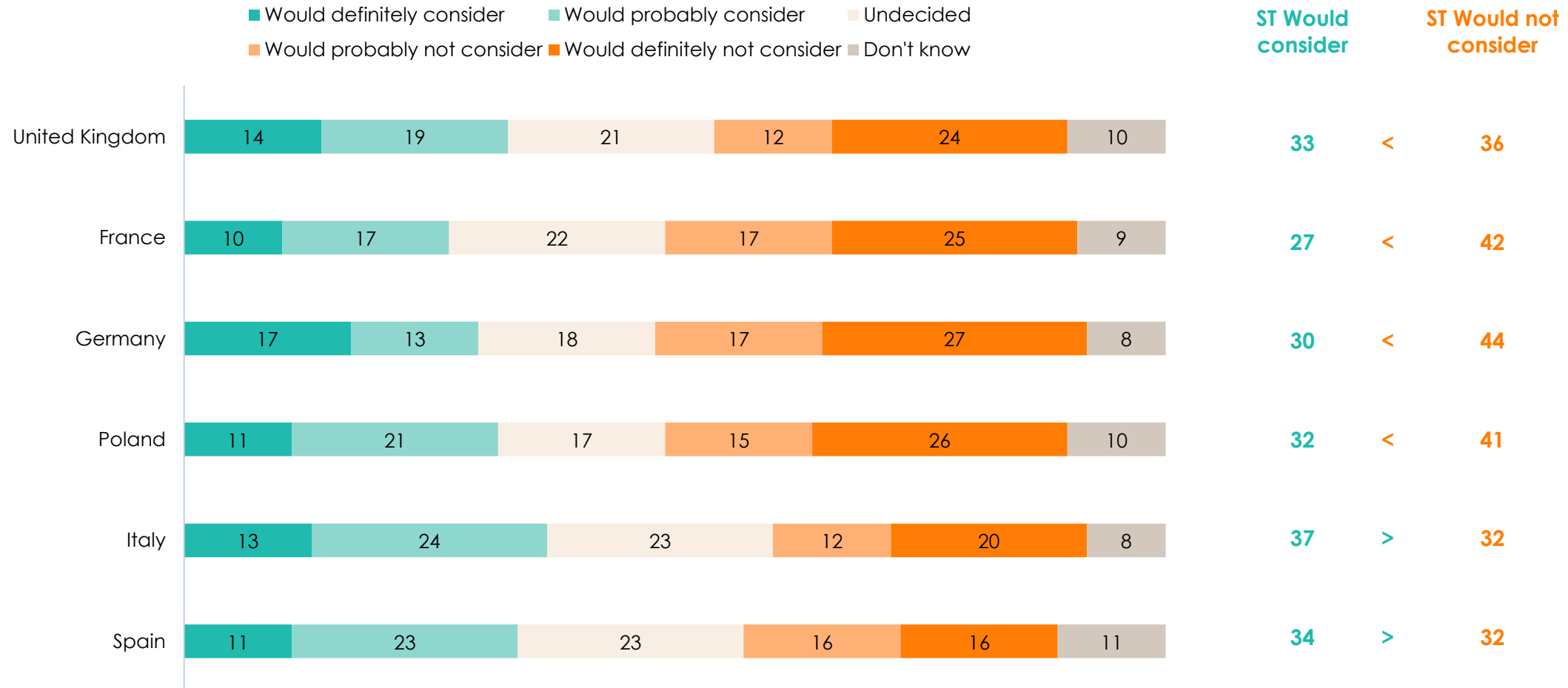
Higher financial comfort increases EV adoption intentions

Q4 - Thinking about the next car you will buy or rent, to what extent would you consider buying a fully electric vehicle (ie not a hybrid)?



Italy and Spain stand out with higher EV consideration than rejection rates

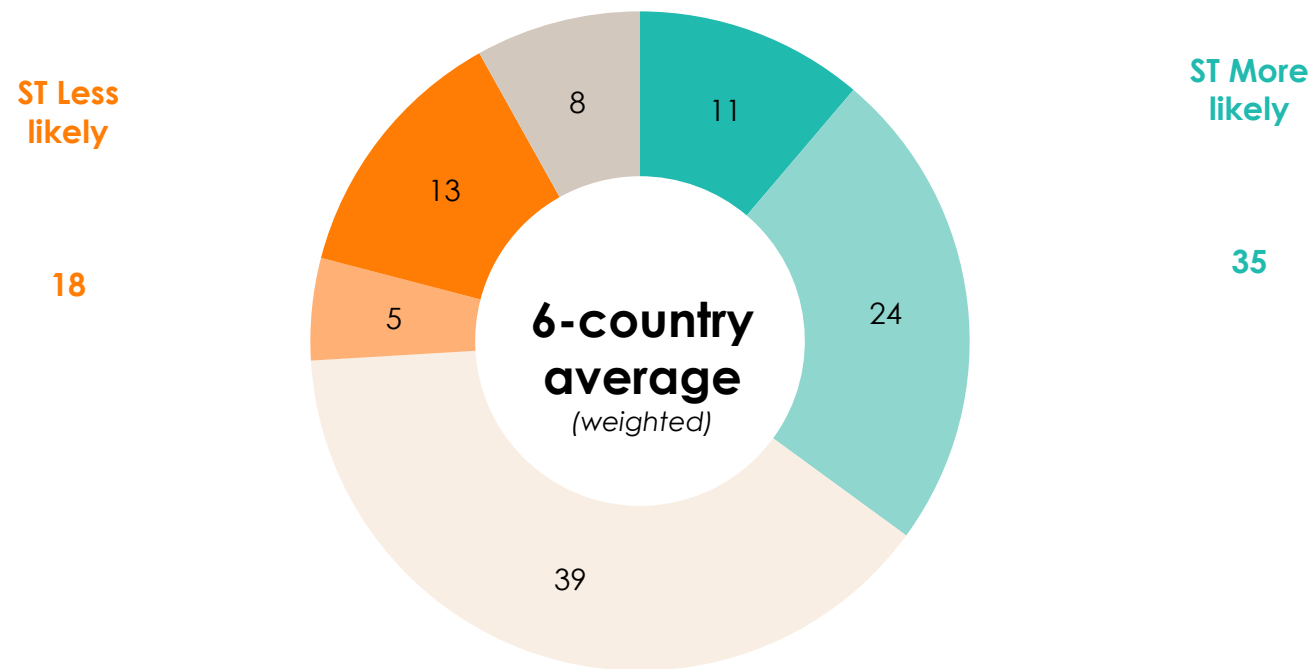
Q4 - Thinking about the next car you will buy or rent, to what extent would you consider buying a fully electric vehicle (ie not a hybrid)?



Rising fuel prices are increasing interest in electric vehicles

Q5 - Would you say that the recent rise in fuel prices makes you more or less likely to consider buying an electric vehicle?

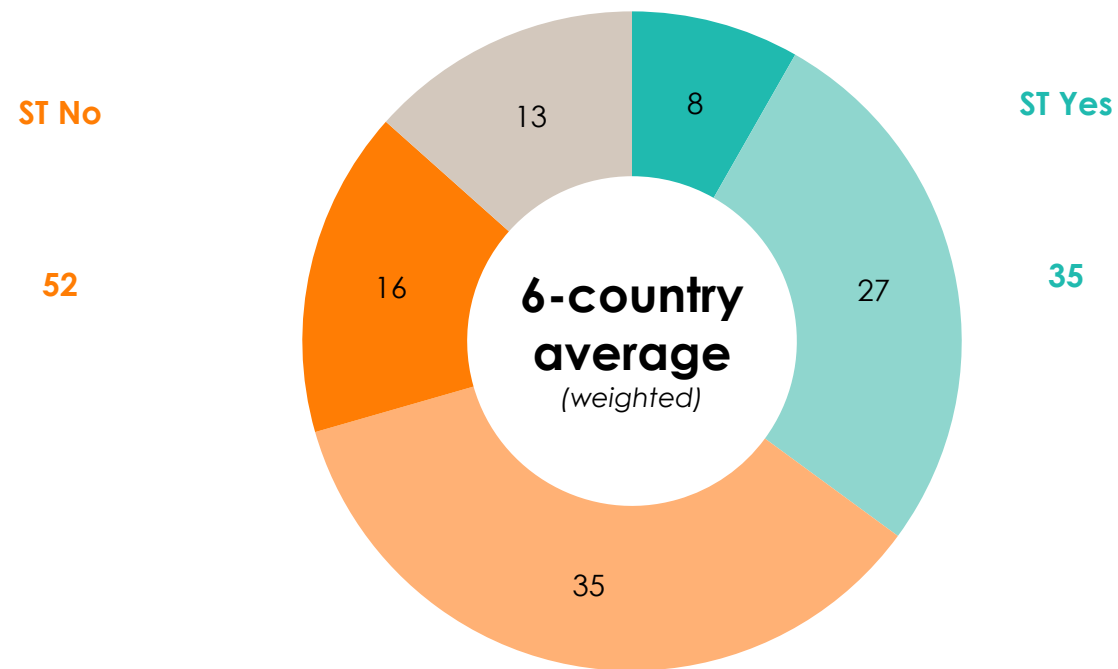
■ Much more likely ■ Somewhat more likely ■ Neither more nor less likely ■ Somewhat less likely ■ Much less likely ■ Don't know



Only a minority believe EV owners are better protected from energy price increases

Q6 - In your opinion, are households that use electric vehicles better protected than others against the current rise in energy prices?

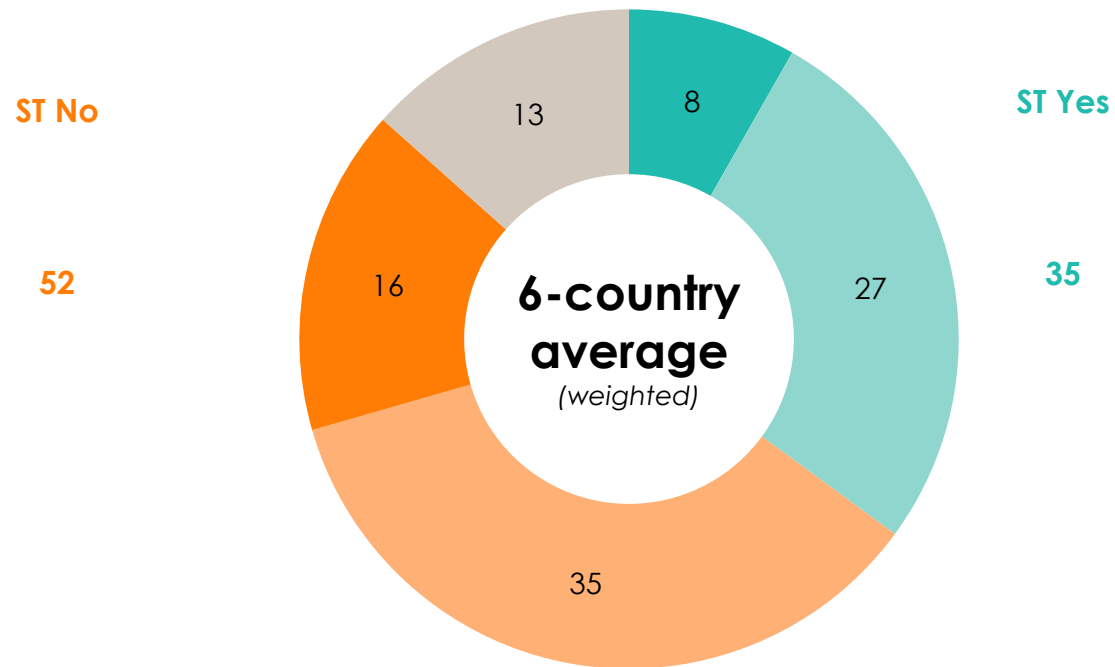
■ Yes, definitely ■ Yes, somewhat ■ No, not really ■ No, not at all ■ Don't know



Perceived protection increases strongly among EV owners themselves

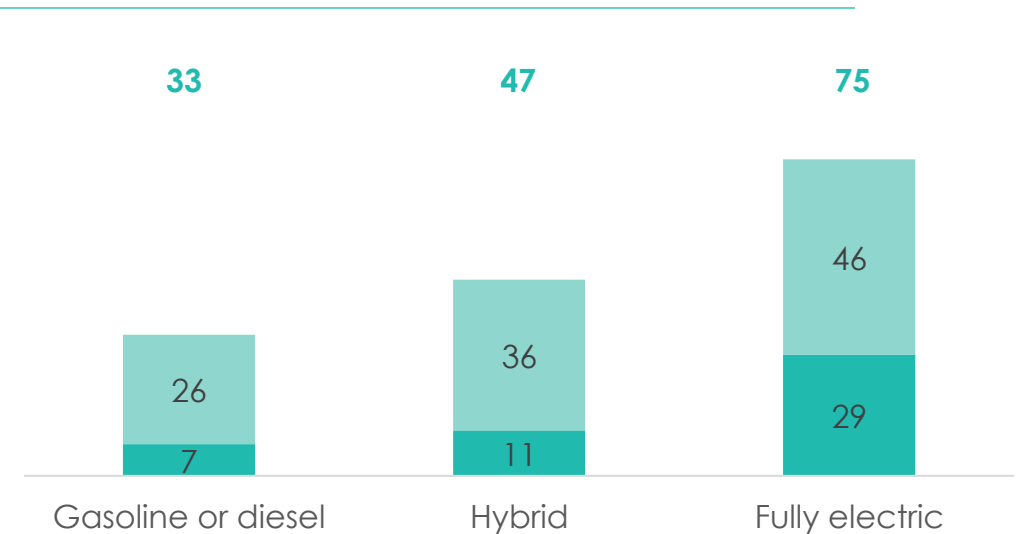
Q6 - In your opinion, are households that use electric vehicles better protected than others against the current rise in energy prices?

■ Yes, definitely ■ Yes, somewhat ■ No, not really ■ No, not at all ■ Don't know



By type of vehicle

ST Yes



■ Yes, definitely ■ Yes, somewhat

Majority support for government action to promote EV adoption across all countries

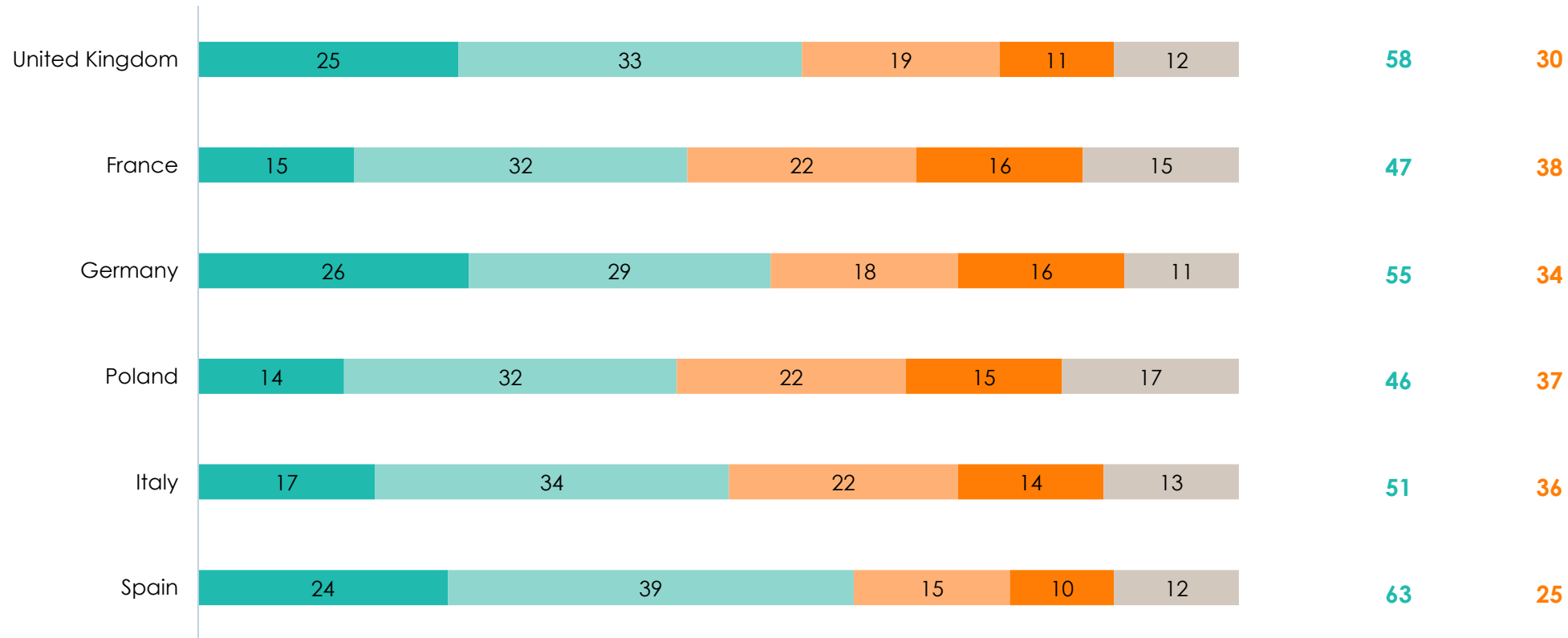
Q7 - Do you believe that the Government in your country should support and encourage the uptake of electric vehicles?

6-country average (weighted)

■ Yes, definitely ■ Yes, somewhat ■ No, not really ■ No, not at all ■ Don't know

ST Yes

ST No

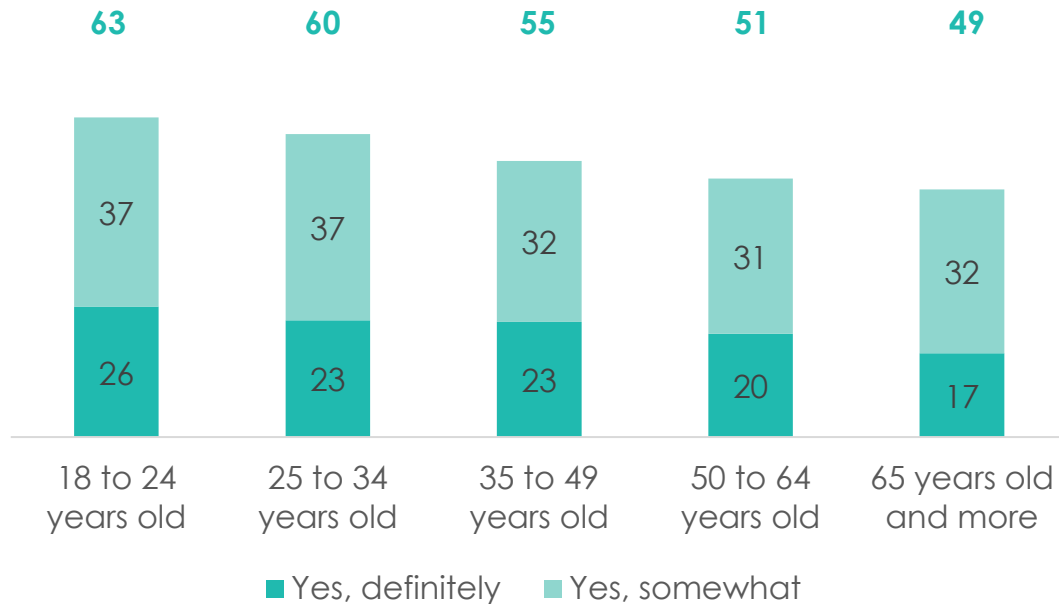


Support is strongest among younger people and EV owners

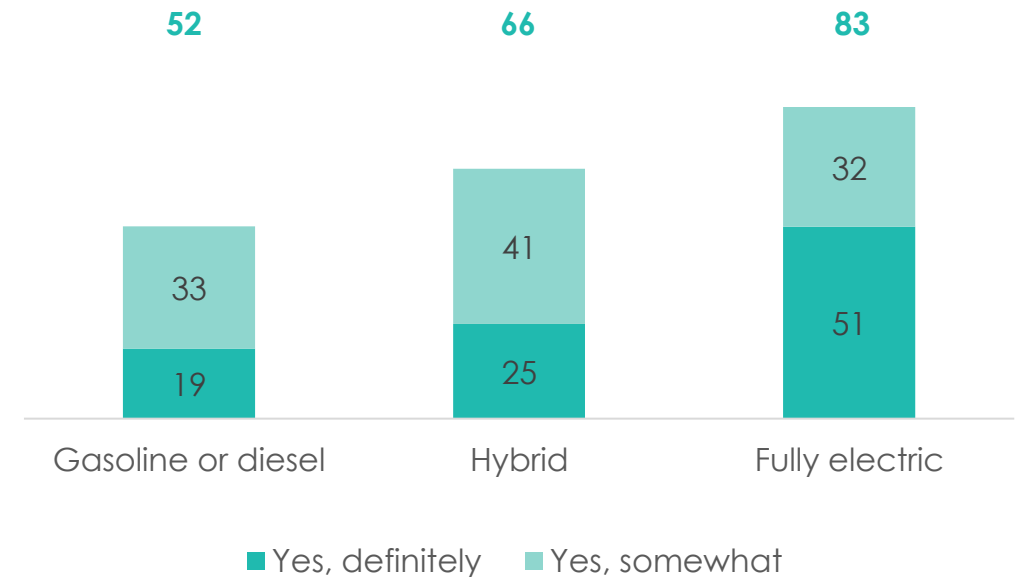
Q7 - Do you believe that the Government in your country should support and encourage the uptake of electric vehicles?

6-country average (weighted)

% ST Yes by age



% Yes by vehicle type

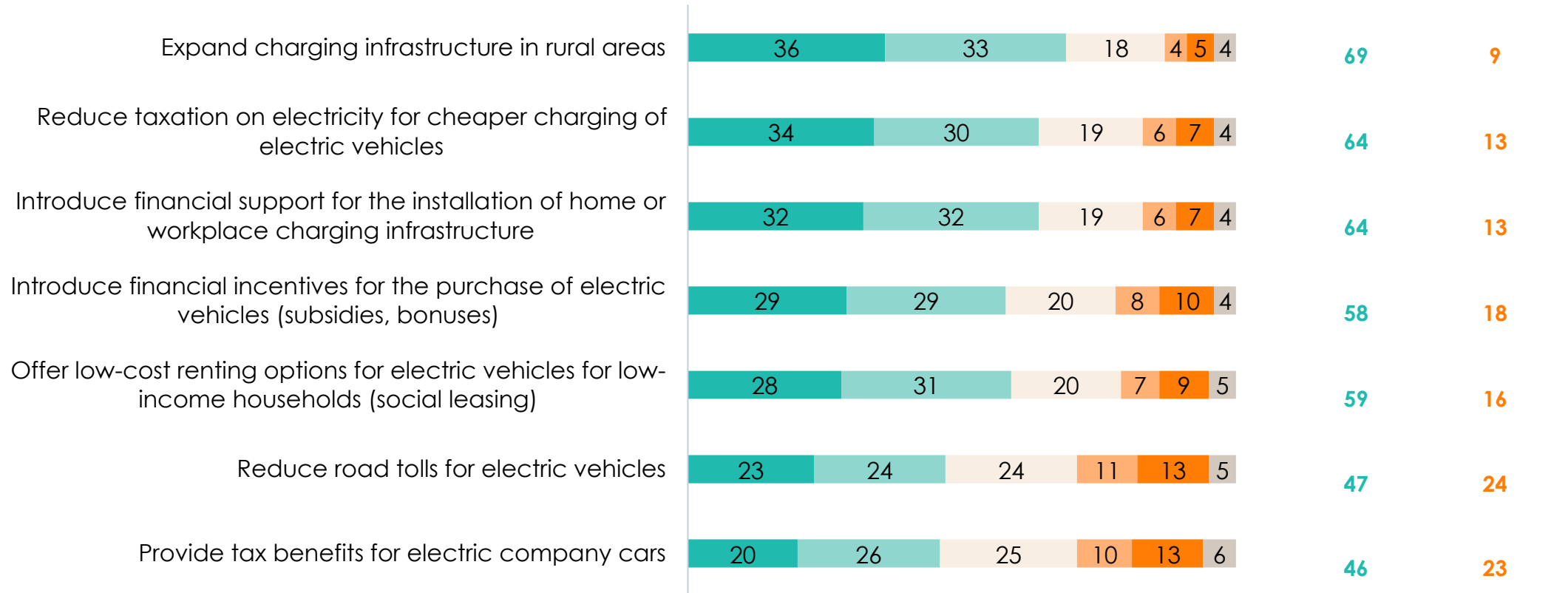


Broad public support for measures to promote electric vehicle adoption

Q8 - And are you in favor or against to each of the following measures?

■ Strongly in favor
 ■ Somewhat in favor
 ■ Neither in favor nor opposed
■ Somewhat opposed
 ■ Strongly opposed
 ■ Don't know

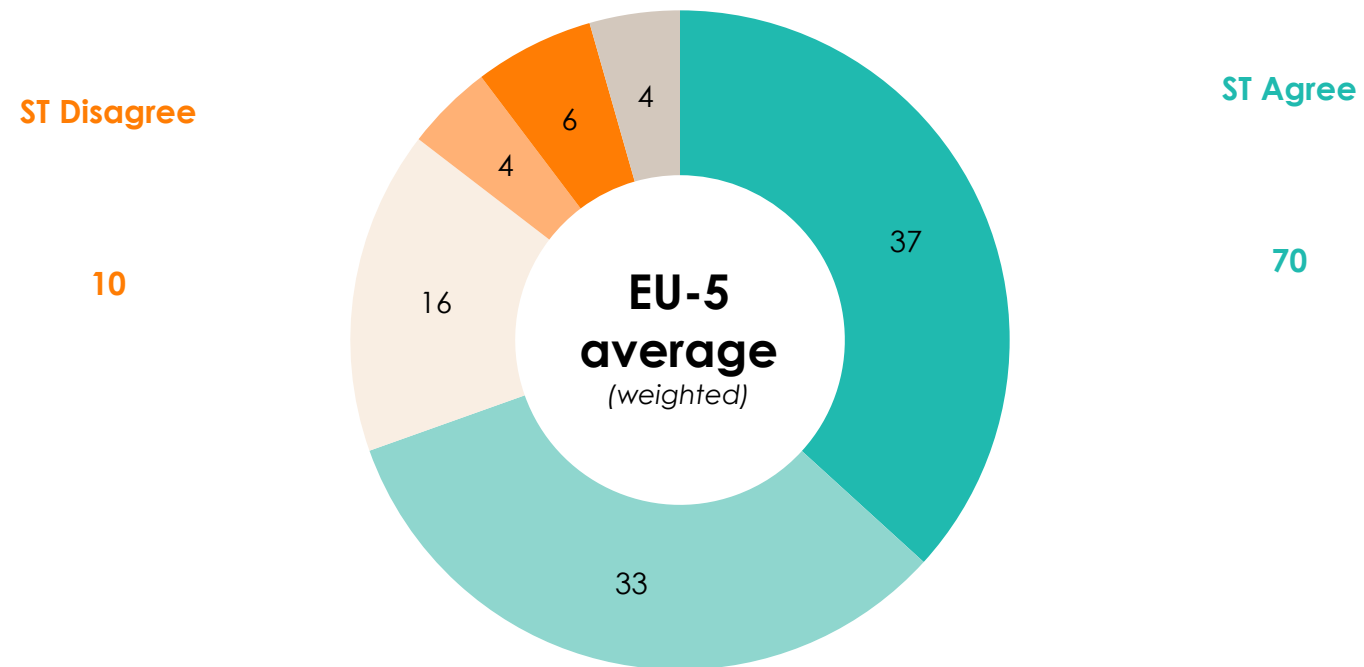
ST In favor ST Opposed



Strong expectation for EU action to make EVs more affordable

Q9 - Do you think the European Union should require car manufacturers to offer more affordable electric vehicles ?

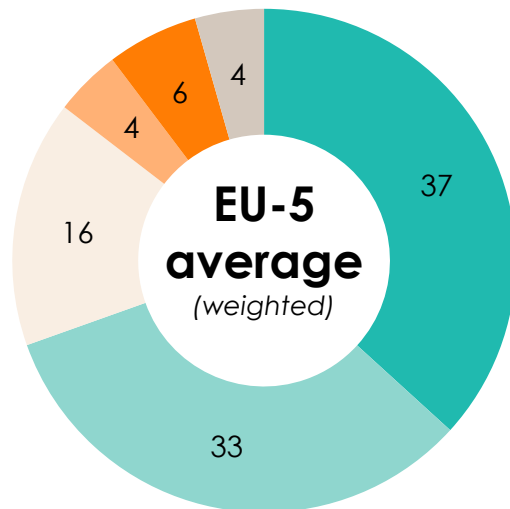
■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know



Support cuts across political divides

Q9 - Do you think the European Union should require car manufacturers to offer more affordable electric vehicles ?

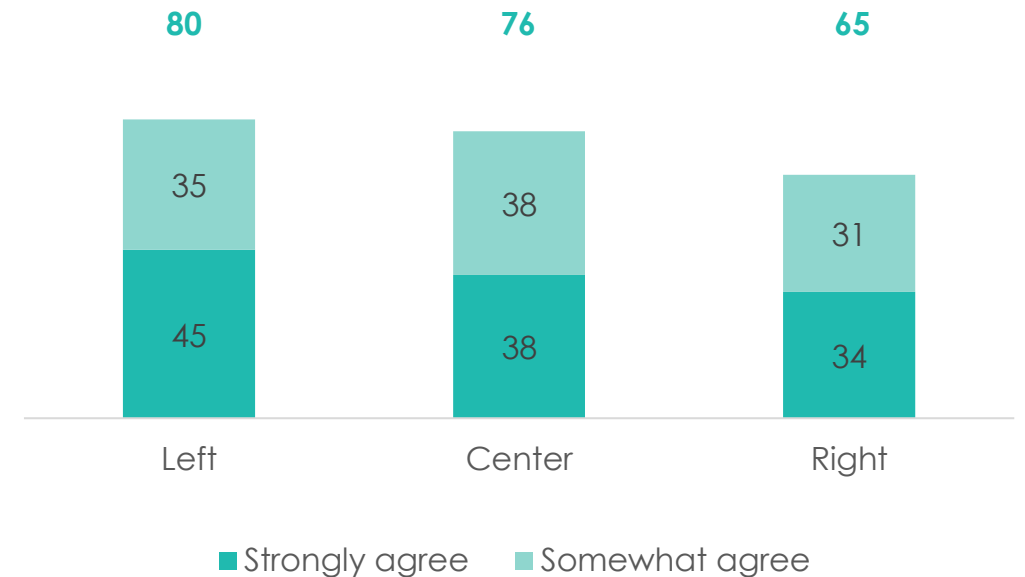
- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- Don't know



ST Agree

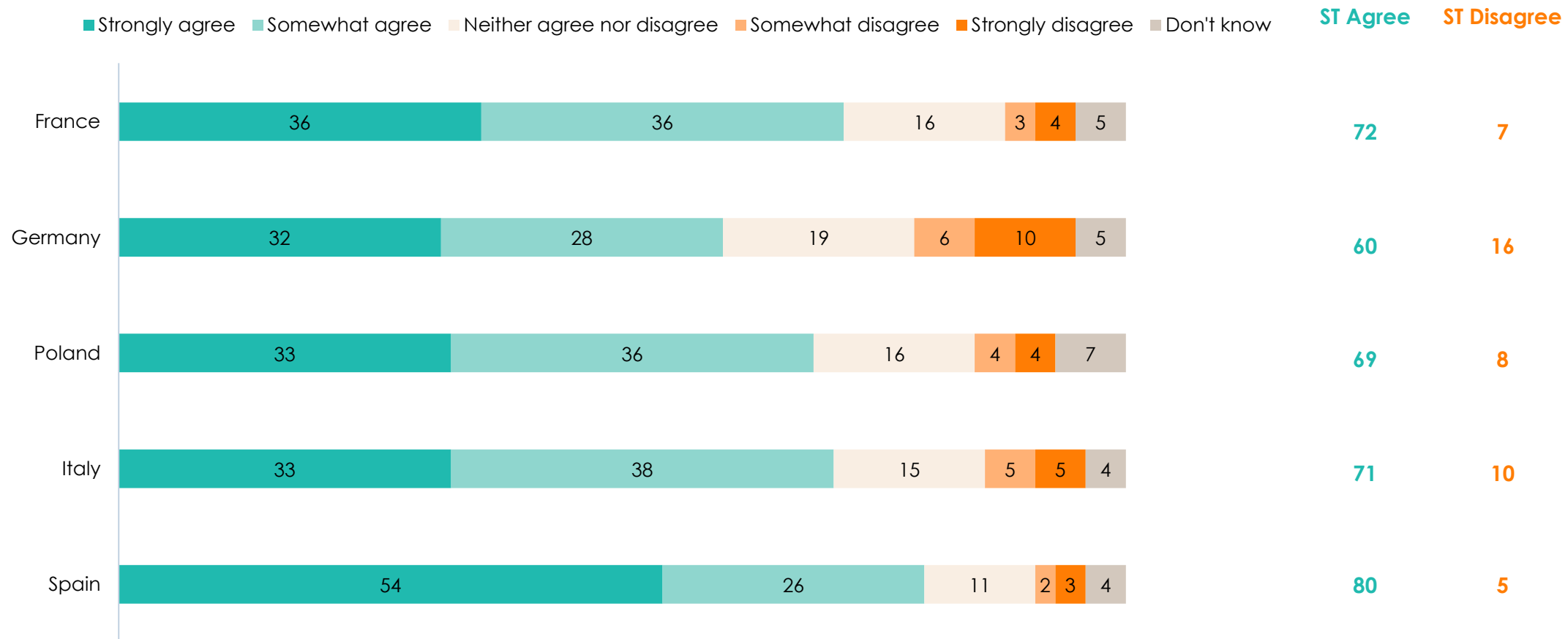
70

% ST Would consider by voting intention



Support is highest in Spain and remains strong across all countries

Q9 - Do you think the European Union should require car manufacturers to offer more affordable electric vehicles ?



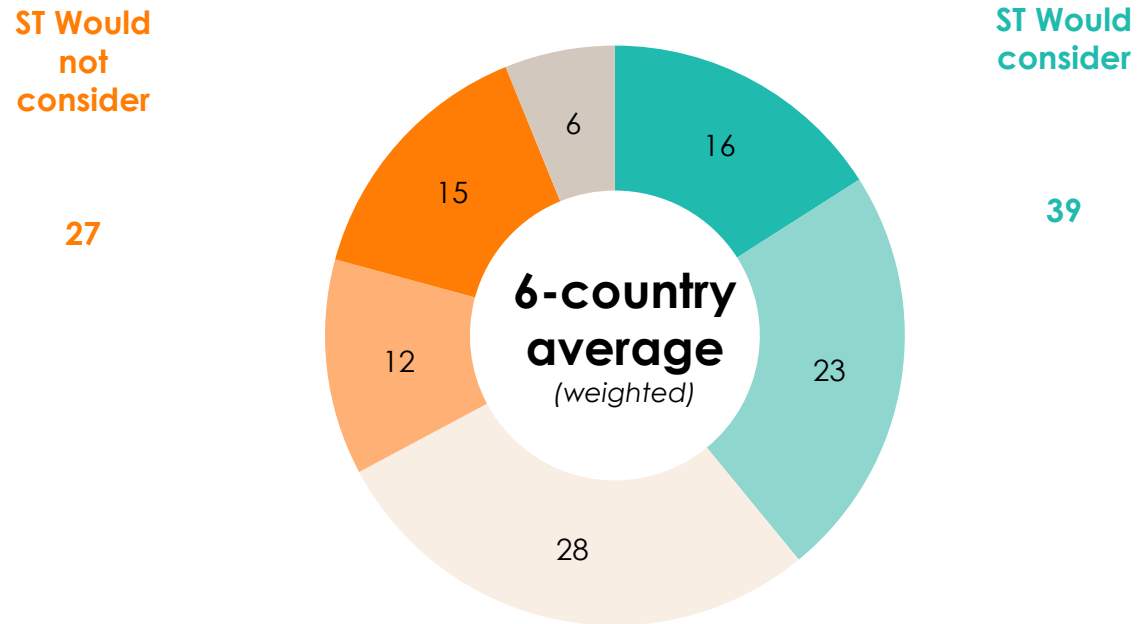
3.

Heat pumps: strong potential but significant structural barriers

More Europeans consider heat pumps than reject them

Q10 - Thinking about your next change or replacement of your home heating system, to what extent would you or would you not consider installing a heat pump?

- Would definitely consider
- Undecided
- Would definitely not consider
- Would probably consider
- Would probably not consider
- I don't know what a heat pump is



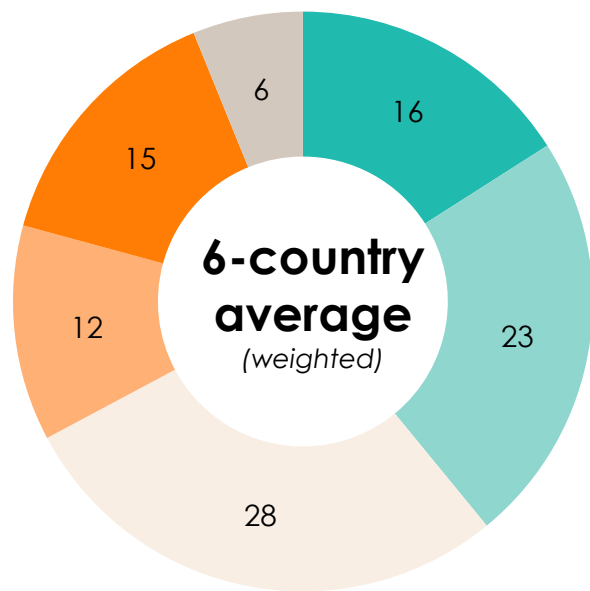
Consideration is much higher among homeowners and current users

Q10 - Thinking about your next change or replacement of your home heating system, to what extent would you or would you not consider installing a heat pump?

- Would definitely consider
- Undecided
- Would definitely not consider
- Would probably consider
- Would probably not consider
- I don't know what a heat pump is

ST Would not consider

27



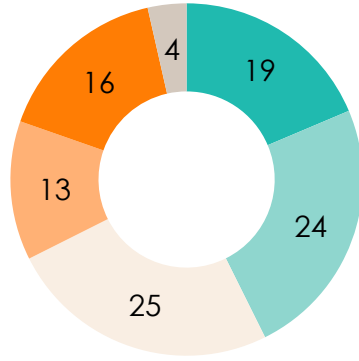
ST Would consider

39

Owners of their primary residence

ST Would consider

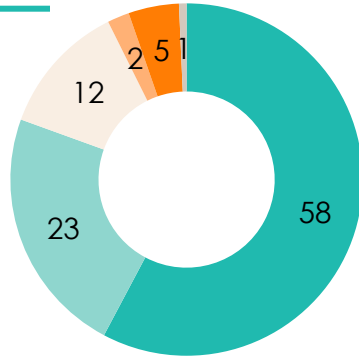
43



For households with a heat pump

ST Would consider

81

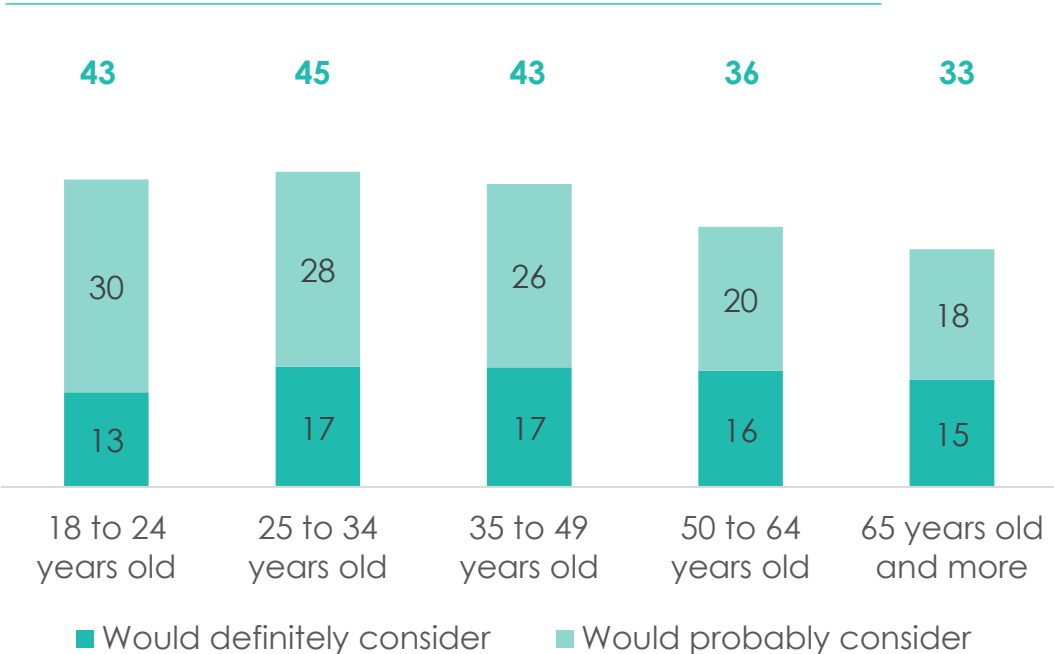


Compared to EVs, a moderate generational and political divide in heat pump adoption

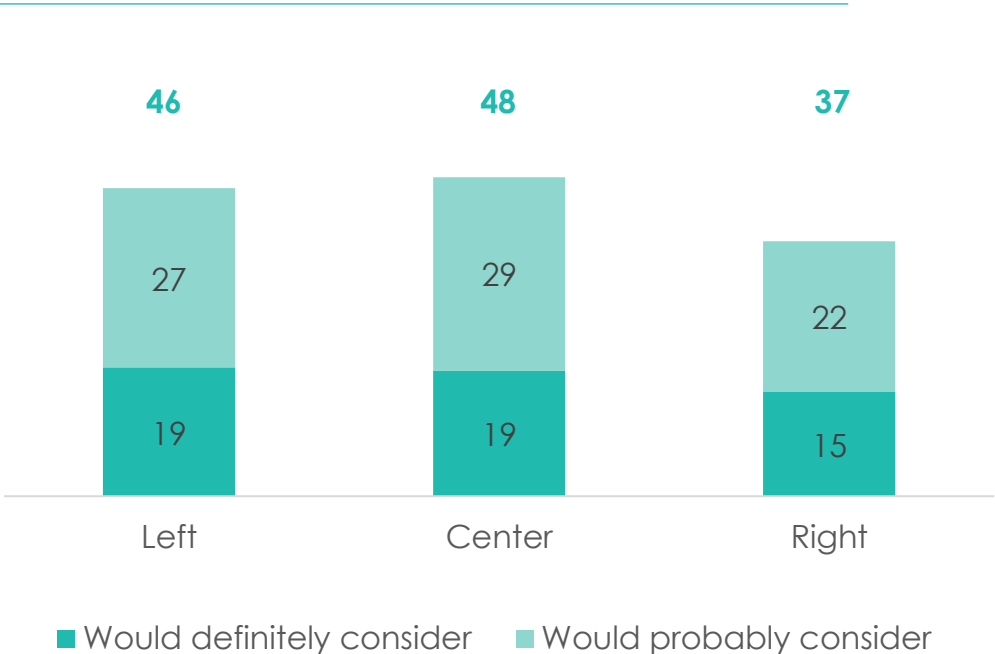
Q10 - Thinking about your next change or replacement of your home heating system, to what extent would you or would you not consider installing a heat pump?

6-country average (weighted)

% ST Would consider by age



% ST Would consider by voting intention



Compared to EVs, heat pump adoption intentions show a more moderate financial divide

Q10 - Thinking about your next change or replacement of your home heating system, to what extent would you or would you not consider installing a heat pump?

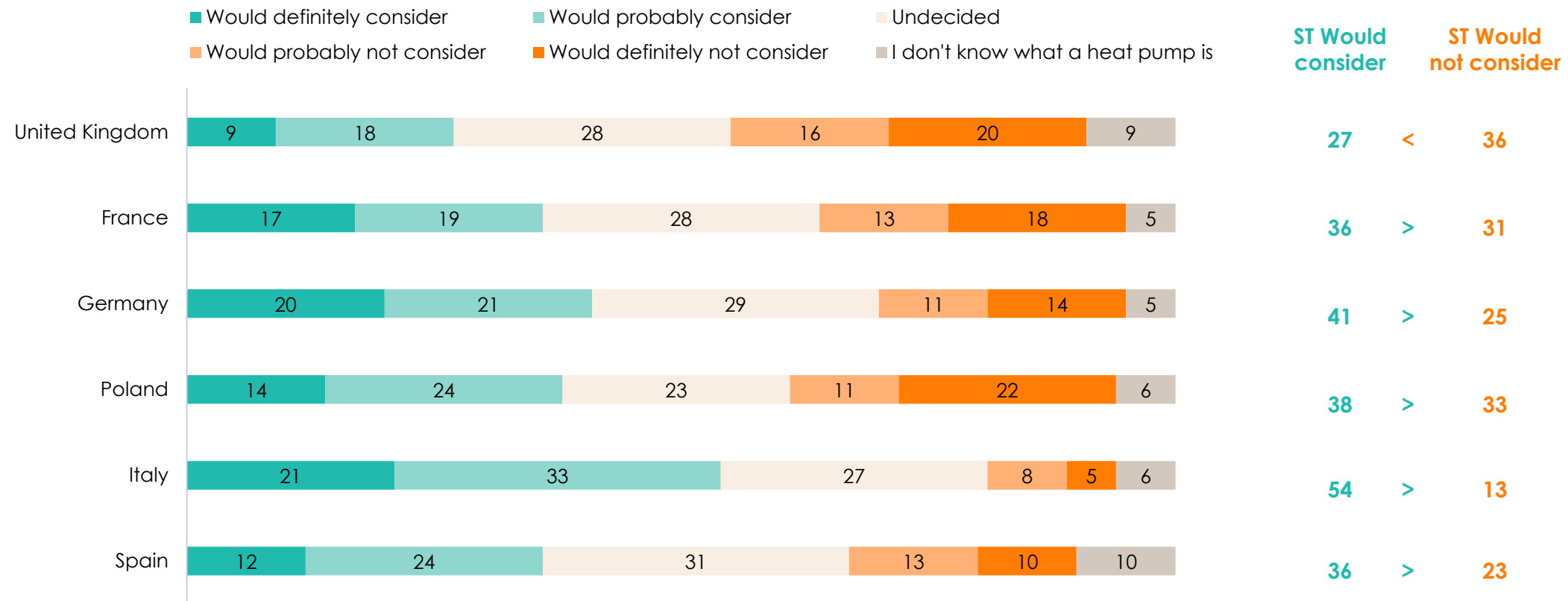
6-country average (weighted)

% ST Would consider by financial situation



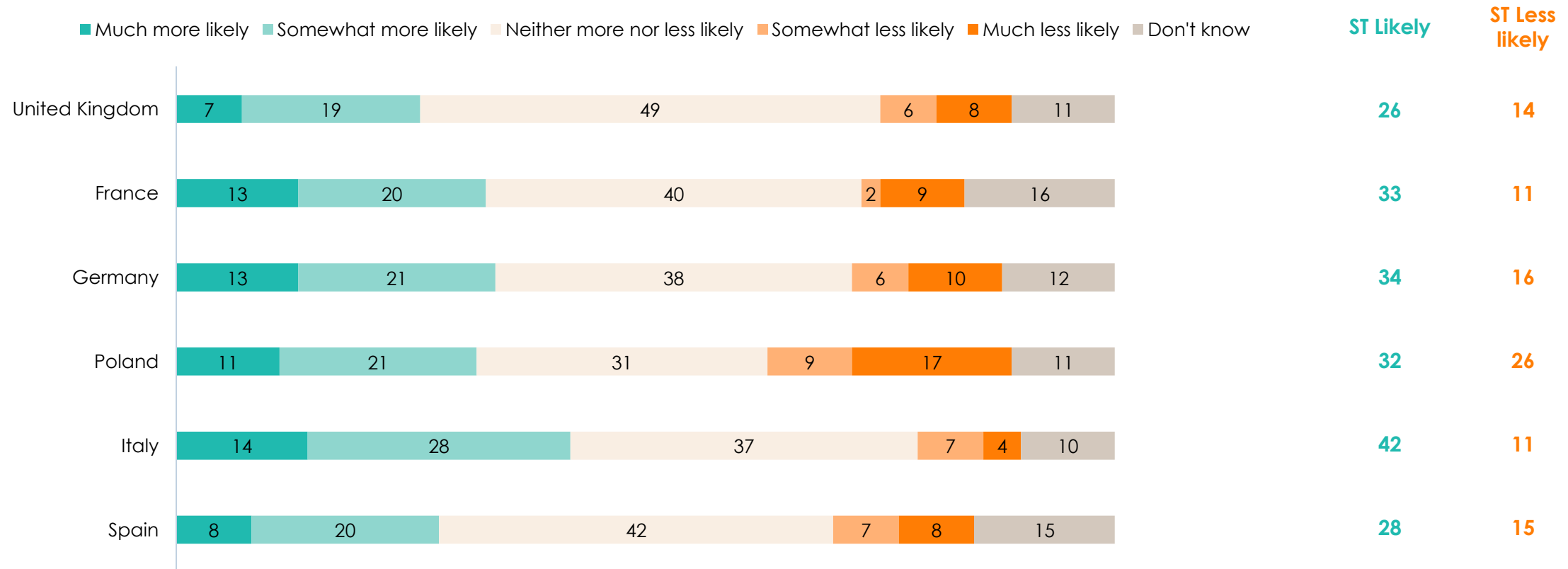
Large cross-country differences in heat pump consideration levels

Q10 - Thinking about your next change or replacement of your home heating system, to what extent would you or would you not consider installing a heat pump?



Between 25% and 40% show greater interest in heat pumps as energy prices climb

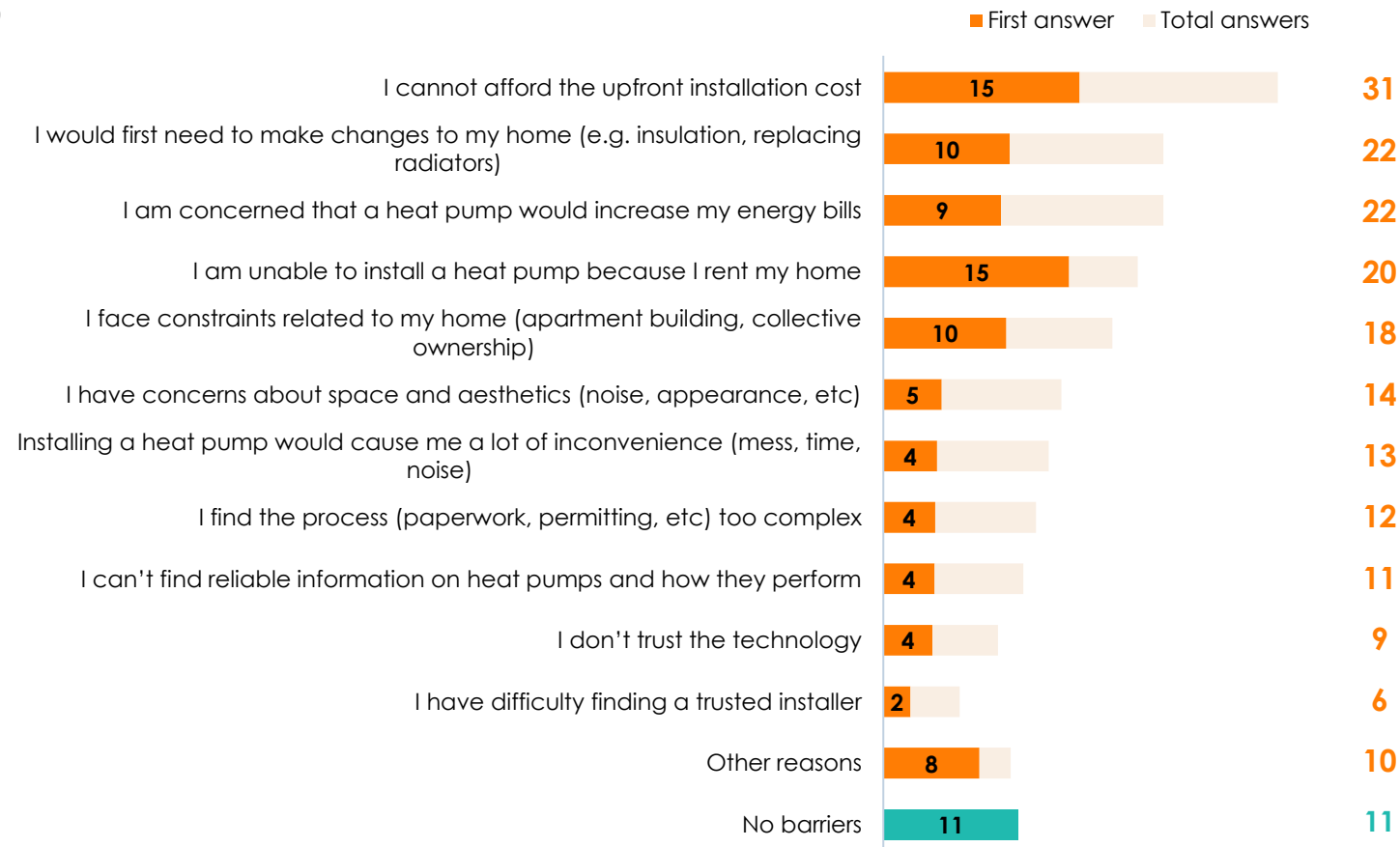
Q11 - Does the recent increase in energy prices make you more or less inclined to consider a heat pump for your next heating system?



Upfront costs are the main barrier, followed by technical constraints

Q12 - What are the main barriers preventing you from considering installing a heat pump in your home?

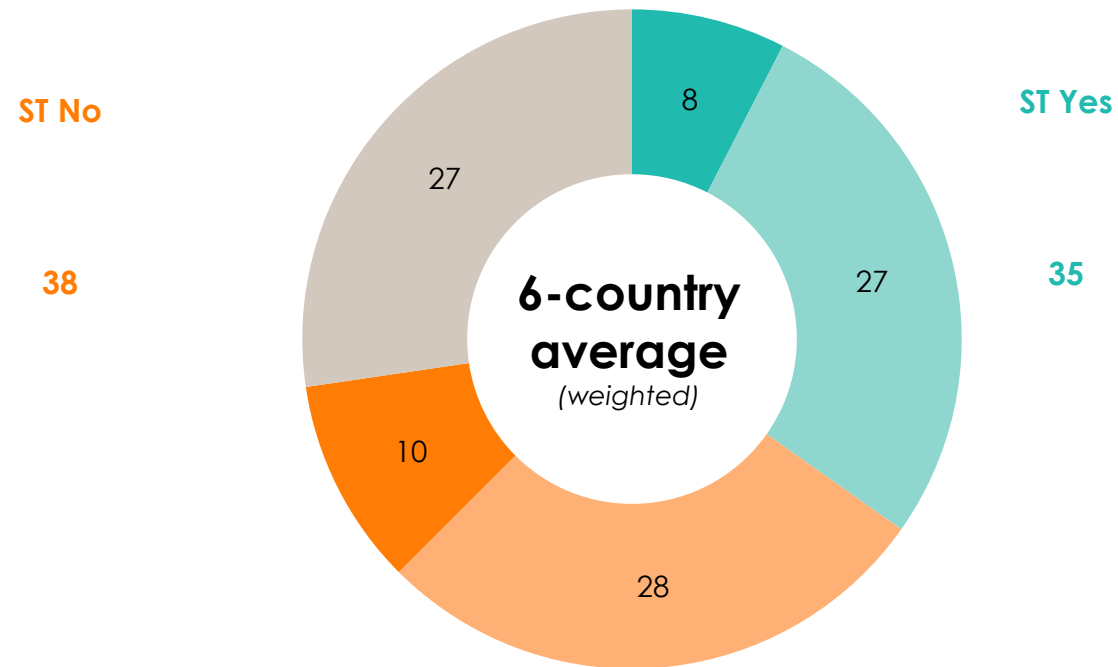
6-country average (weighted)



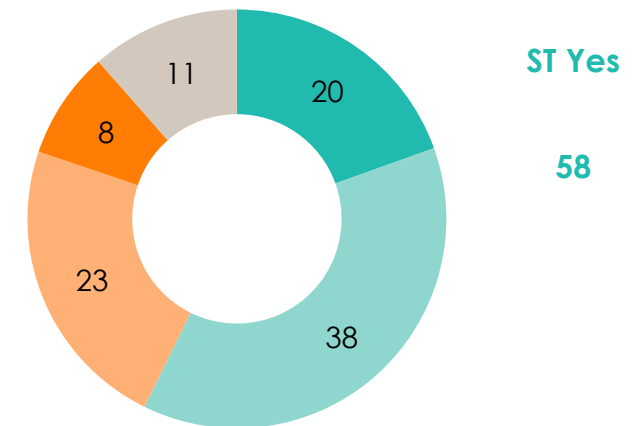
Europeans remain divided on whether heat pumps protect against price increases

Q13 - And in your opinion, are households with a heat pump better protected than others against rise in energy prices?

■ Yes, definitely ■ Yes, somewhat ■ No, not really ■ No, not at all ■ Don't know

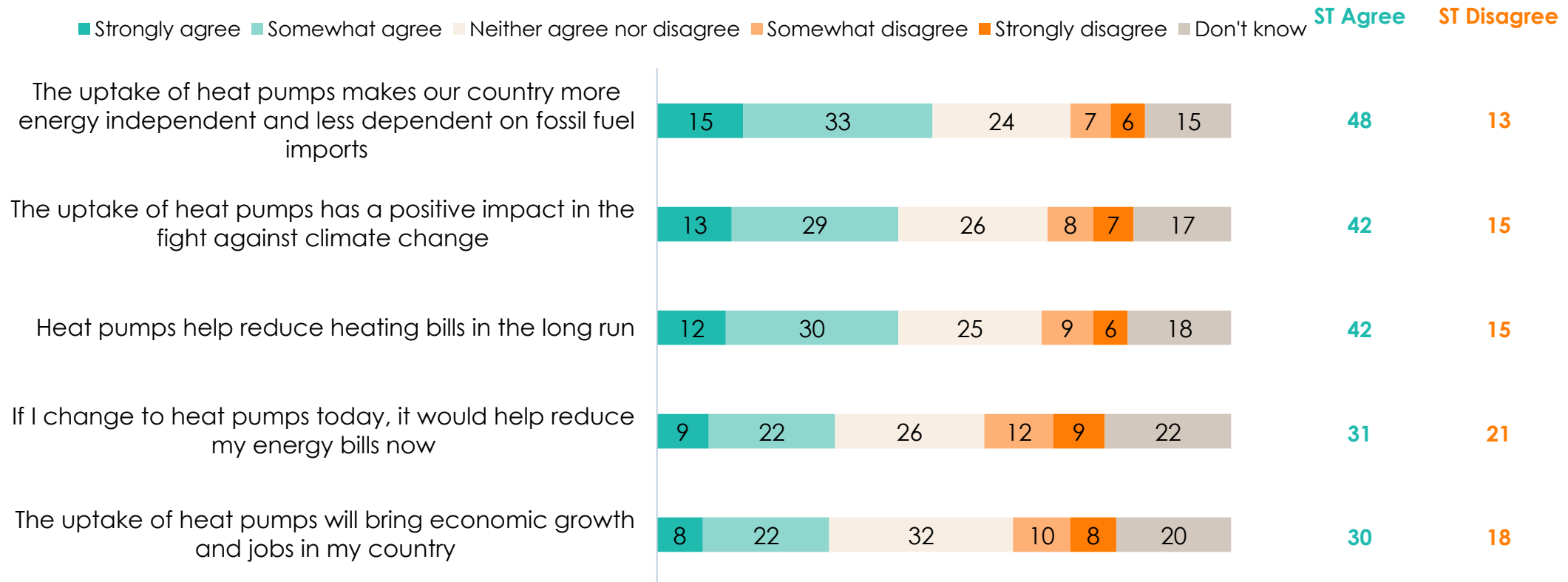


For households with a heat pump



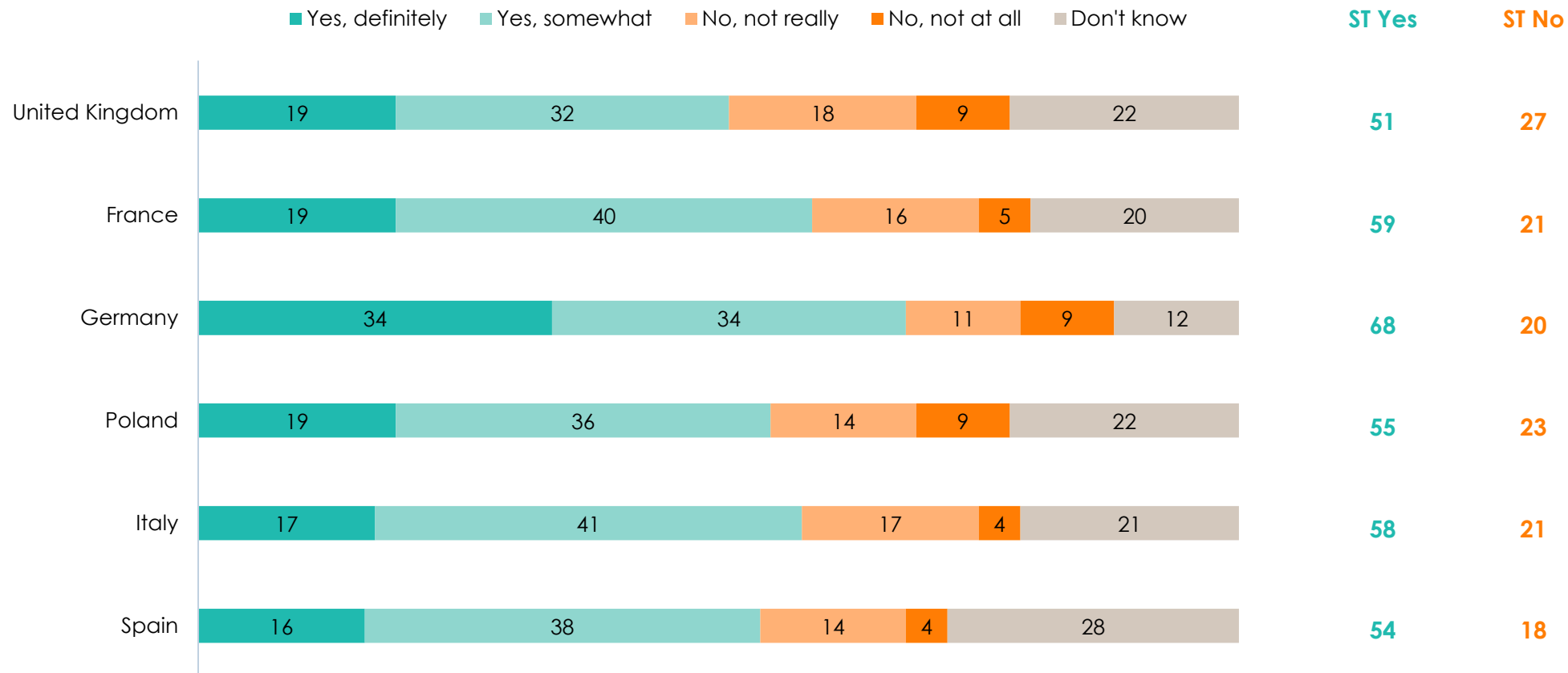
Opinions on heat pumps remain relatively under-formed, with a high level of uncertainty. While their collective benefits (energy independence and climate impact) are recognised, their individual and especially short-term benefits still raise many questions.

Q14 - Do you agree or disagree with each of the following statements?



Majority support government promotion of heat pumps across countries

Q15 - Do you think that public authorities in your country should support and encourage the installation of heat pumps in homes?

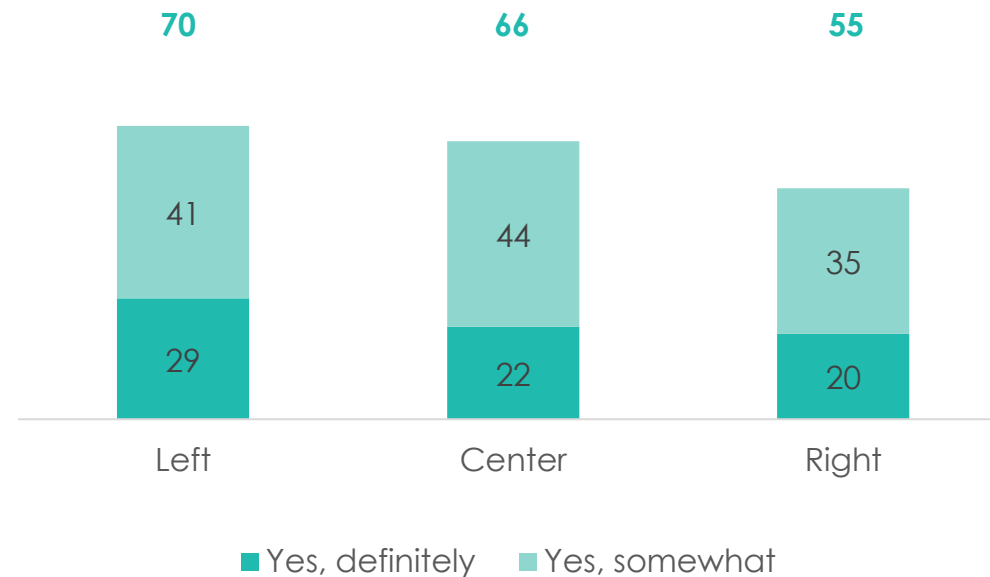


Support is stronger on the left but remains majority across the political spectrum

Q15 - Do you think that public authorities in your country should support and encourage the installation of heat pumps in homes?

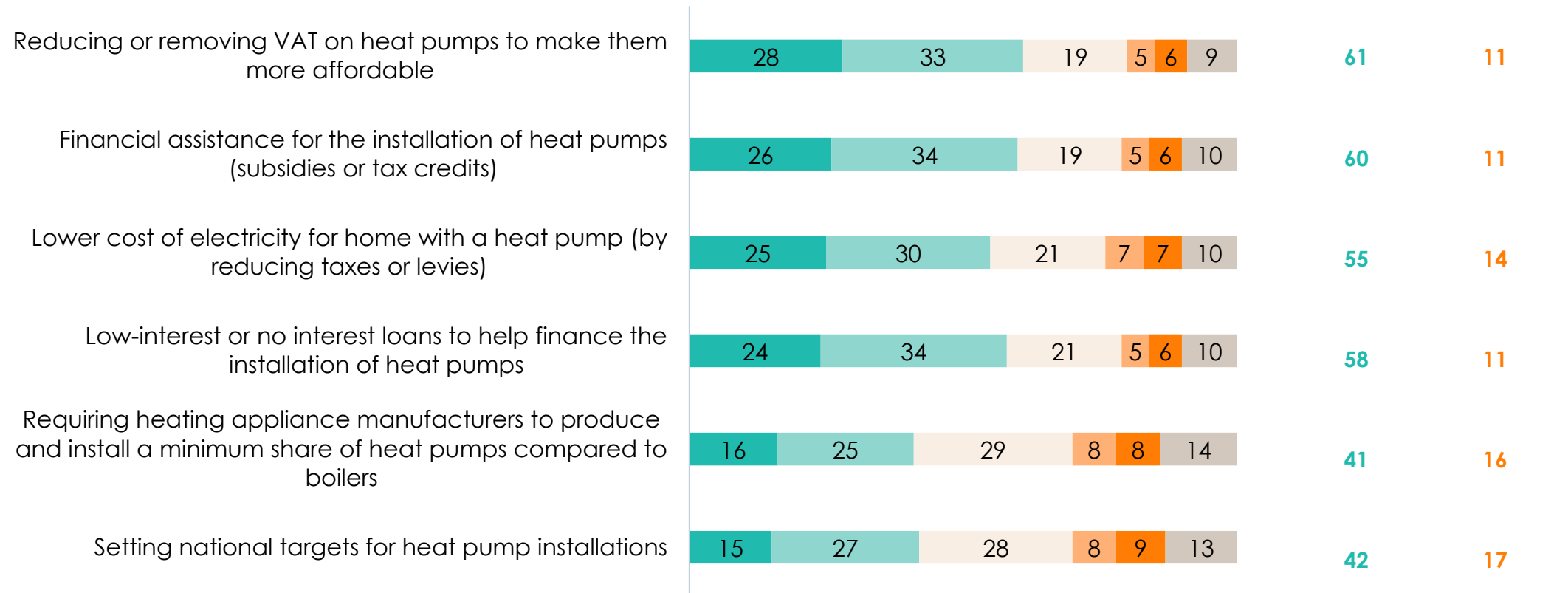
6-country average (weighted)

% ST Yes by voting intention



Strong public support for financial and policy measures to accelerate heat pump adoption

Q16 - And are you in favor or opposed to each of the following measures?



Main take-aways

1. Energy crisis is reshaping attitudes: support is there, but affordability is critical

A prolonged energy crisis is now widely anticipated and strongly felt across Europe

- Around **7 in 10** expect energy prices to remain high in the long term
- A **majority report a significant impact on household budgets** across all countries
- Financially vulnerable households and heavy car users are **particularly affected**

This context reinforces support for the transition, but also raises affordability constraints

- **50% support reducing dependence on fossil-fuel vehicles (EU-5)**, with limited opposition
- Support is **strongest where the crisis is most acute** (Spain, Italy)
- However, **social and political divides persist** (lower support among right-leaning voters)

The crisis creates a favourable context for transition policies, but public acceptance is conditional on addressing affordability and fairness.

Main take-aways

2. Adoption remains constrained: strong mandate for public action

Interest in low-carbon solutions is real, but adoption remains limited and uneven

- EV intentions are **polarised** (32% would consider vs. 38% would not)
- Heat pumps show **higher potential (39% consider vs. 27% reject)** but with many undecided
- In both cases, **upfront costs and structural barriers** are key obstacles

The energy crisis is a partial accelerator

- Around **one-third say rising prices increase likelihood of EV or heat pump adoption**
- However, perceived individual benefits remain **uncertain or unclear**, especially in the short term

There is a clear and consistent demand for policy intervention

- **Majorities support government action** to promote EVs and heat pumps
- Strong backing for **financial incentives, lower energy costs and infrastructure expansion**
- A **large majority (70%) expect the EU to ensure more affordable EVs**

European public opinion forms a clear mandate: accelerating adoption requires reducing upfront costs, improving infrastructure, and making benefits tangible for households.

Thank you



Powering decisions
that shape the world.