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

Public opinion survey across six European countries – Wave 2

Global Report

November 2026

verian

European Climate Foundation

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 was conducted from 29 October to 4 November 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.

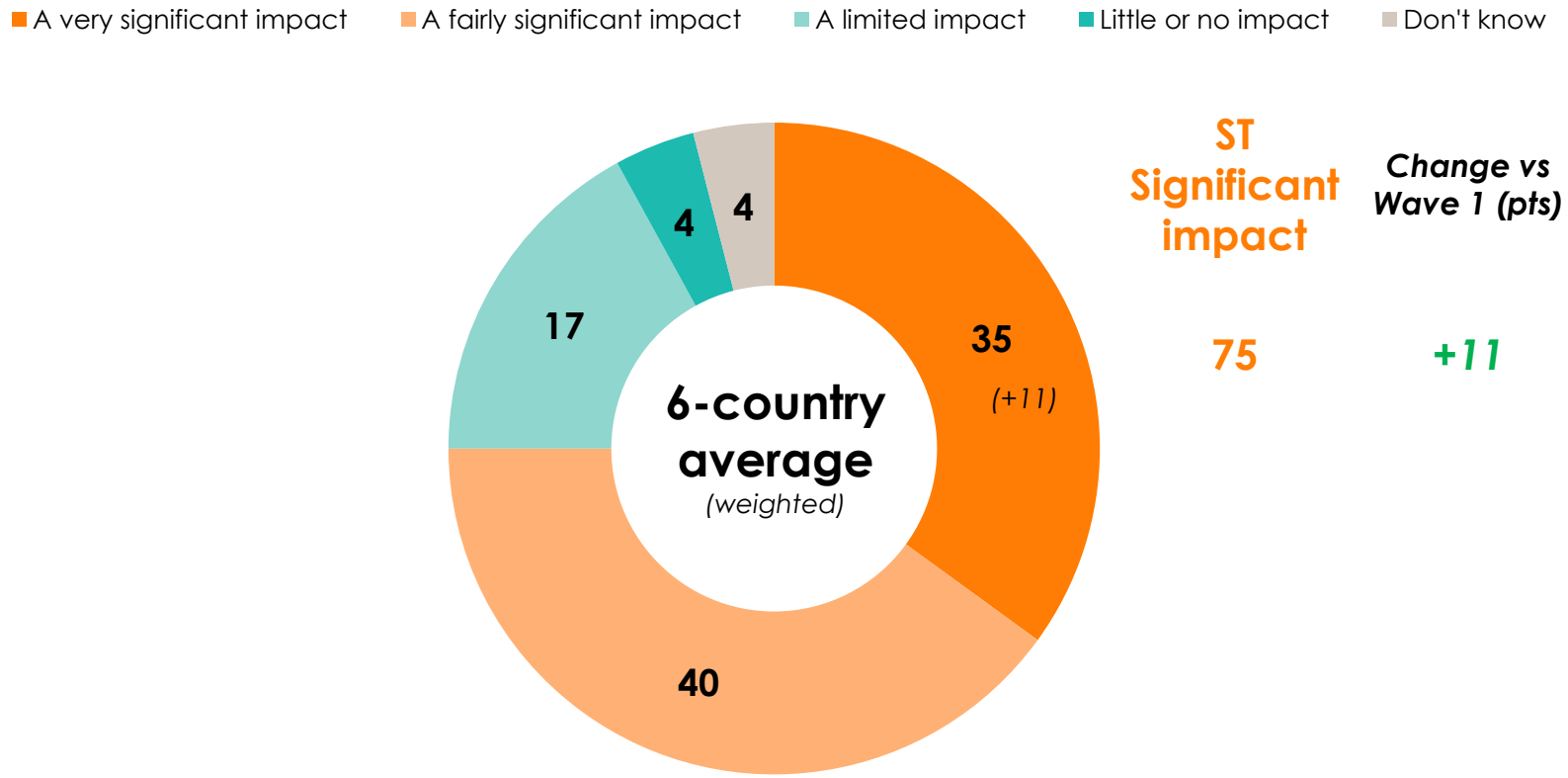
Figures are percentages. Changes versus Wave 1 (conducted between 29 May and 3 June 2026) are shown in percentage points. Differences may not always be statistically significant.

1.

Context: as the energy crisis persists, pressure on household budgets is intensifying

Three-quarters of households now report a significant impact from rising living and energy costs

Q2 - In February 2026, the United States and Israel attacked Iran. Since the beginning of the war would you say that the increase in the cost of living, including energy and fuel prices, has had on your household budget:



While the most vulnerable remain hardest hit, the crisis is increasingly widespread

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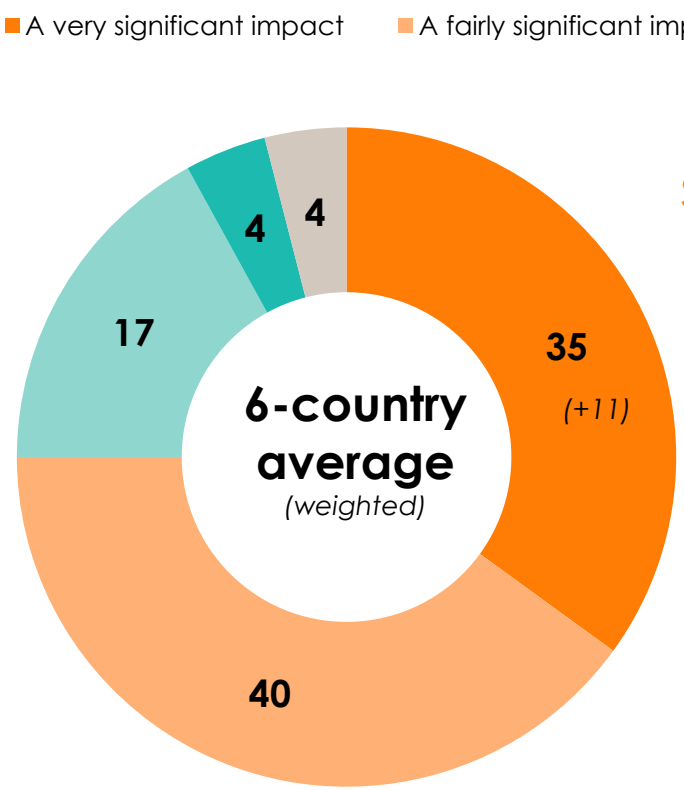
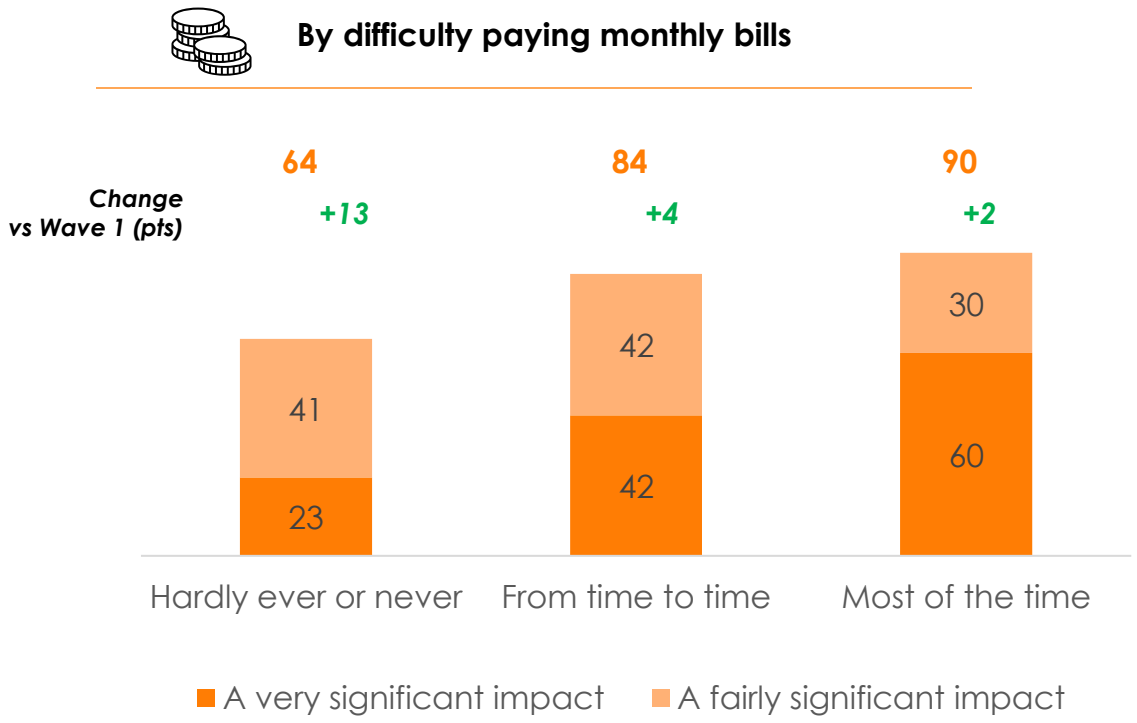


ST Significant impact	Change vs Wave 1 (pts)
75	+11



The financial impact of the crisis has intensified across all six countries

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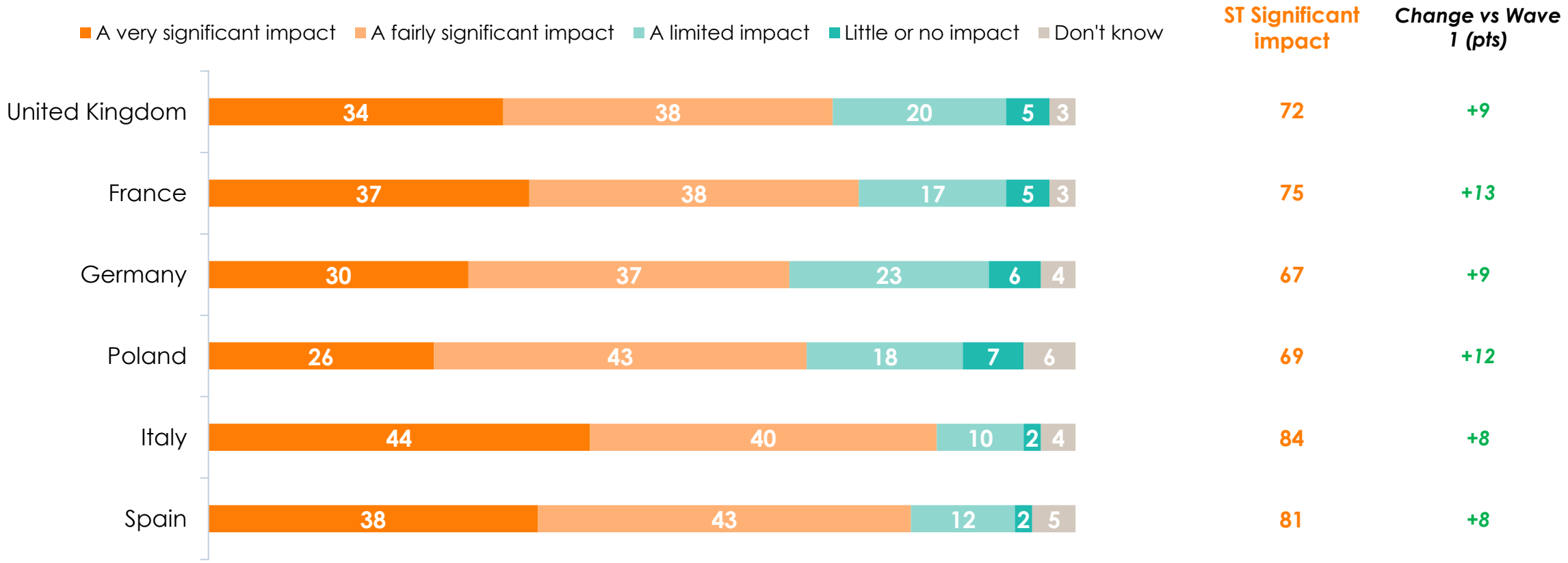
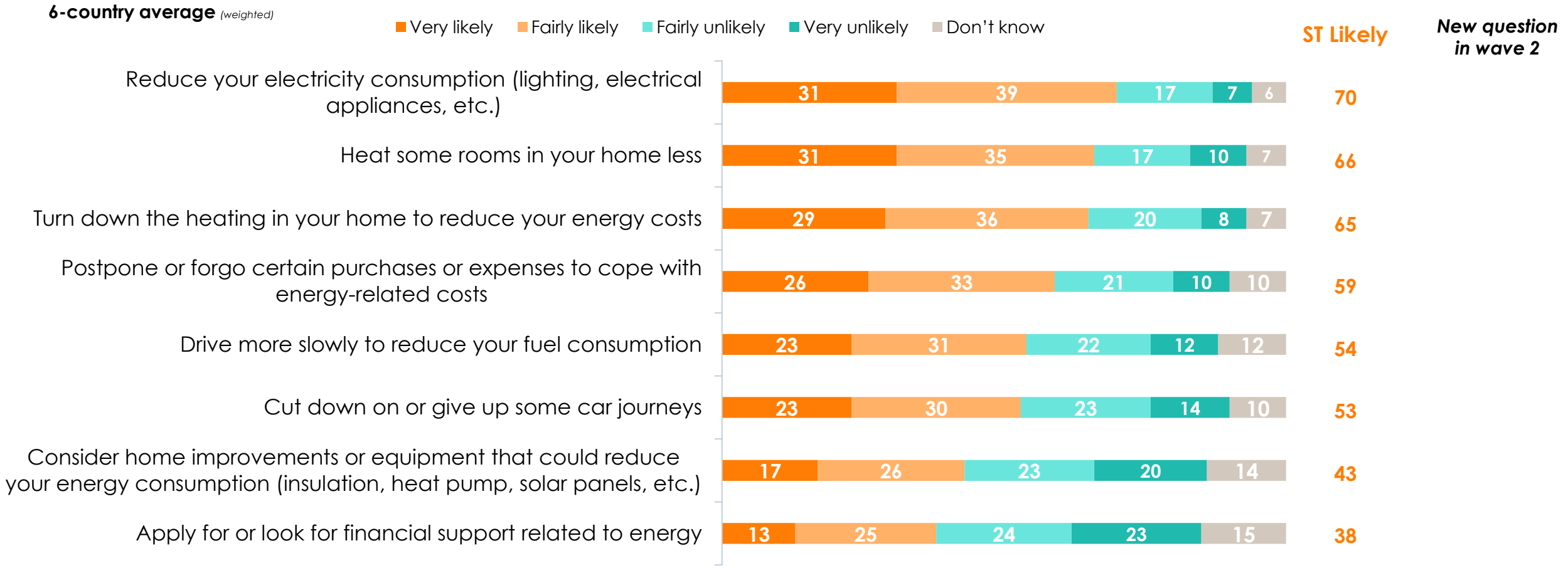


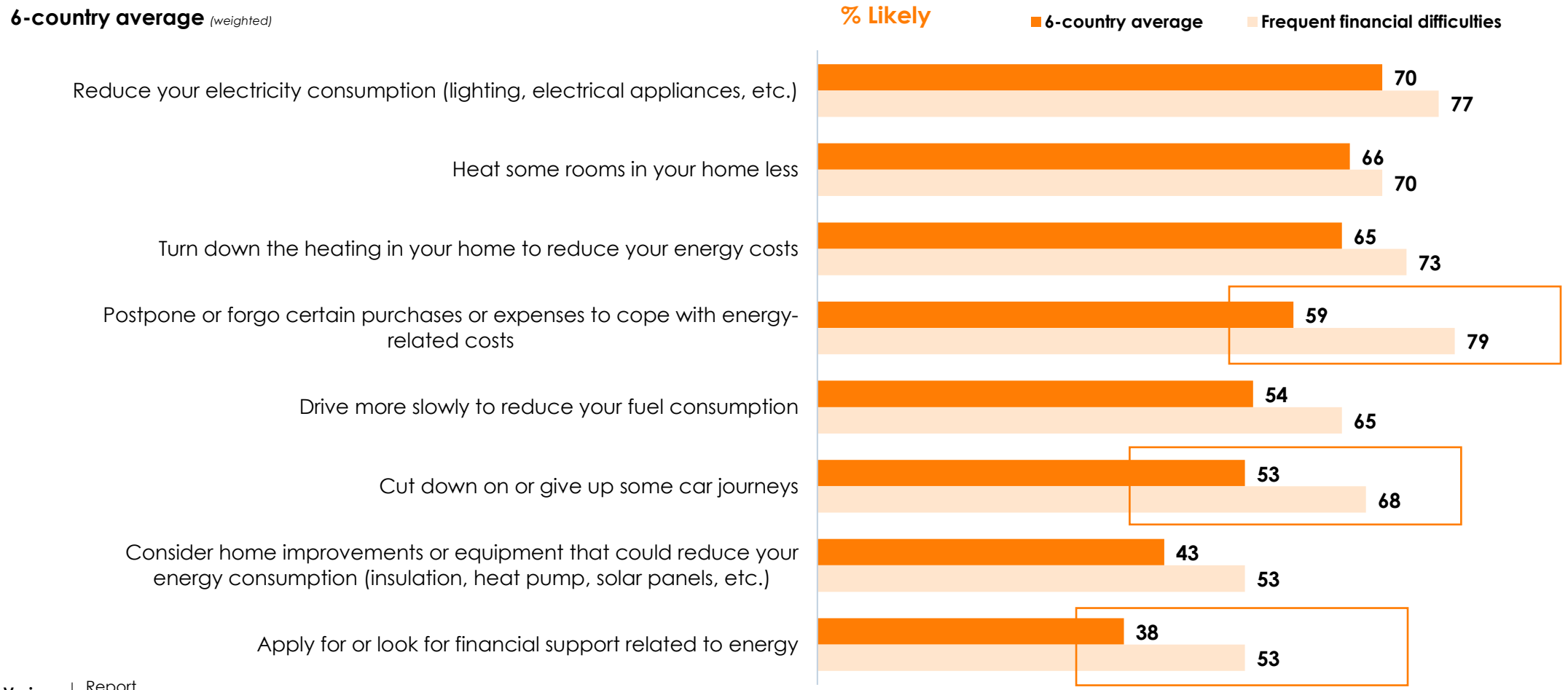
With winter approaching, a large majority of Europeans are considering reducing their electricity consumption

Q21 - Given recent changes in energy and fuel prices, and with winter approaching, how likely are you to do each of the following over the next few months?



Households facing frequent financial difficulties are much more likely to cut spending and energy use

Q21 - Given recent changes in energy and fuel prices, and with winter approaching, how likely are you to do each of the following over the next few months?



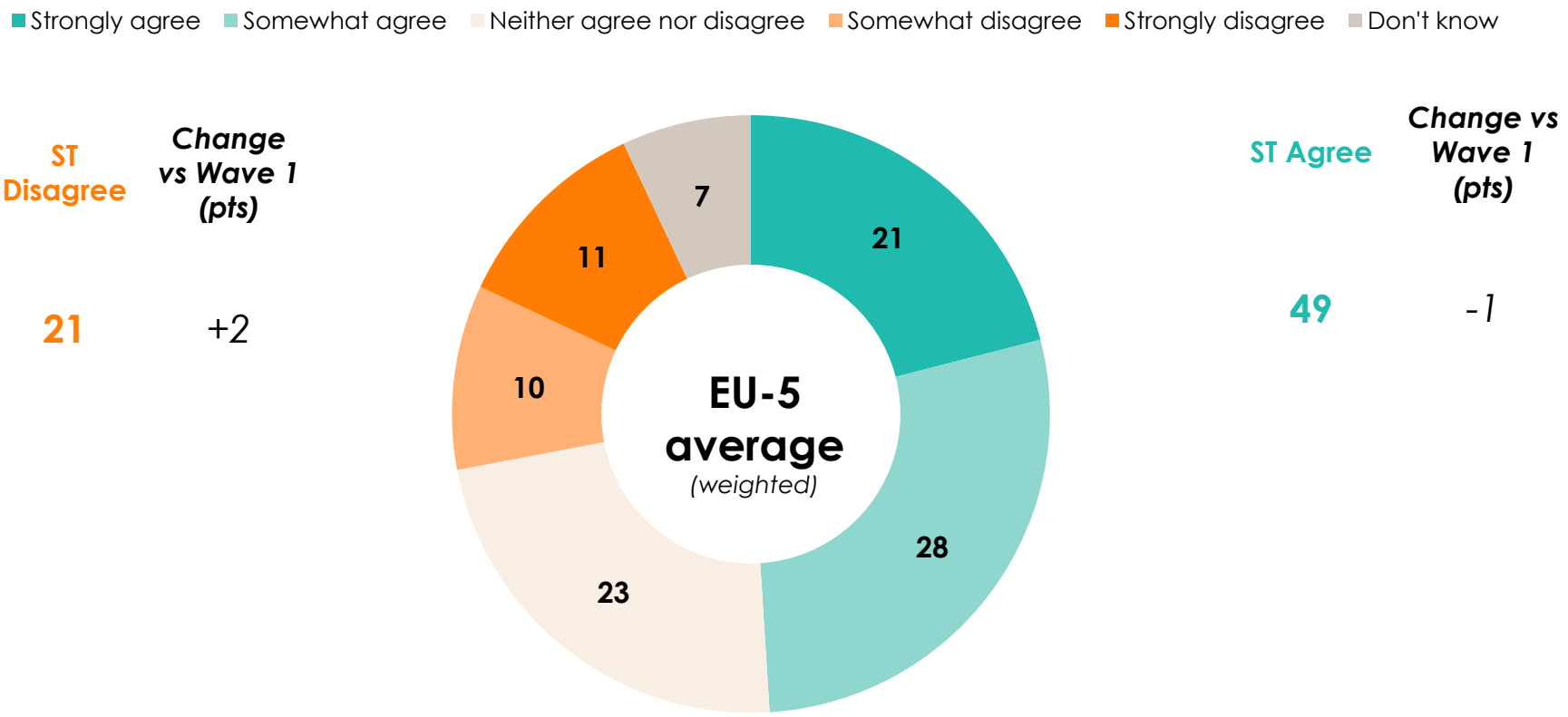
With winter approaching, a large majority of Europeans are considering reducing their electricity consumption

Q21 - Given recent changes in energy and fuel prices, and with winter approaching, how likely are you to do each of the following over the next few months?

% Likely	6-country average	United Kingdom	France	Germany	Poland	Italy	Spain
Reduce your electricity consumption (lighting, electrical appliances, etc.)	**70**	**72**	**74**	**67**	**66**	**74**	**66**
Heat some rooms in your home less	**66**	**69**	**74**	**67**	**57**	65	**59**
Turn down the heating in your home to reduce your energy costs	**65**	**69**	**67**	**63**	**54**	**71**	**62**
Postpone or forgo certain purchases or expenses to cope with energy-related costs	59	54	61	58	**54**	**68**	57
Drive more slowly to reduce your fuel consumption	54	44	66	52	49	62	52
Cut down on or give up some car journeys	53	47	63	52	49	63	48
Consider home improvements or equipment that could reduce your energy consumption (insulation, heat pump, solar panels, etc.)	43	43	39	42	44	51	43
Apply for or look for financial support related to energy	38	34	40	32	41	37	45

Around half of respondents support reducing the EU's dependence on fossil-fuel vehicles

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



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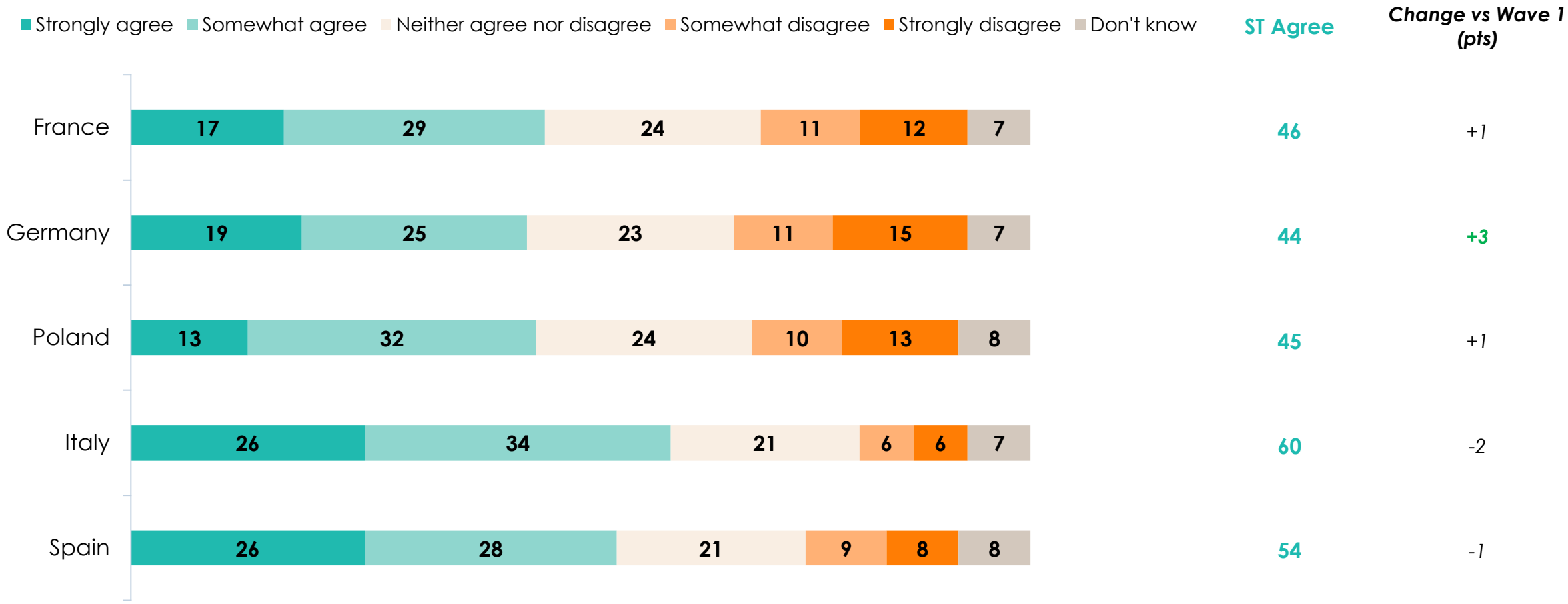
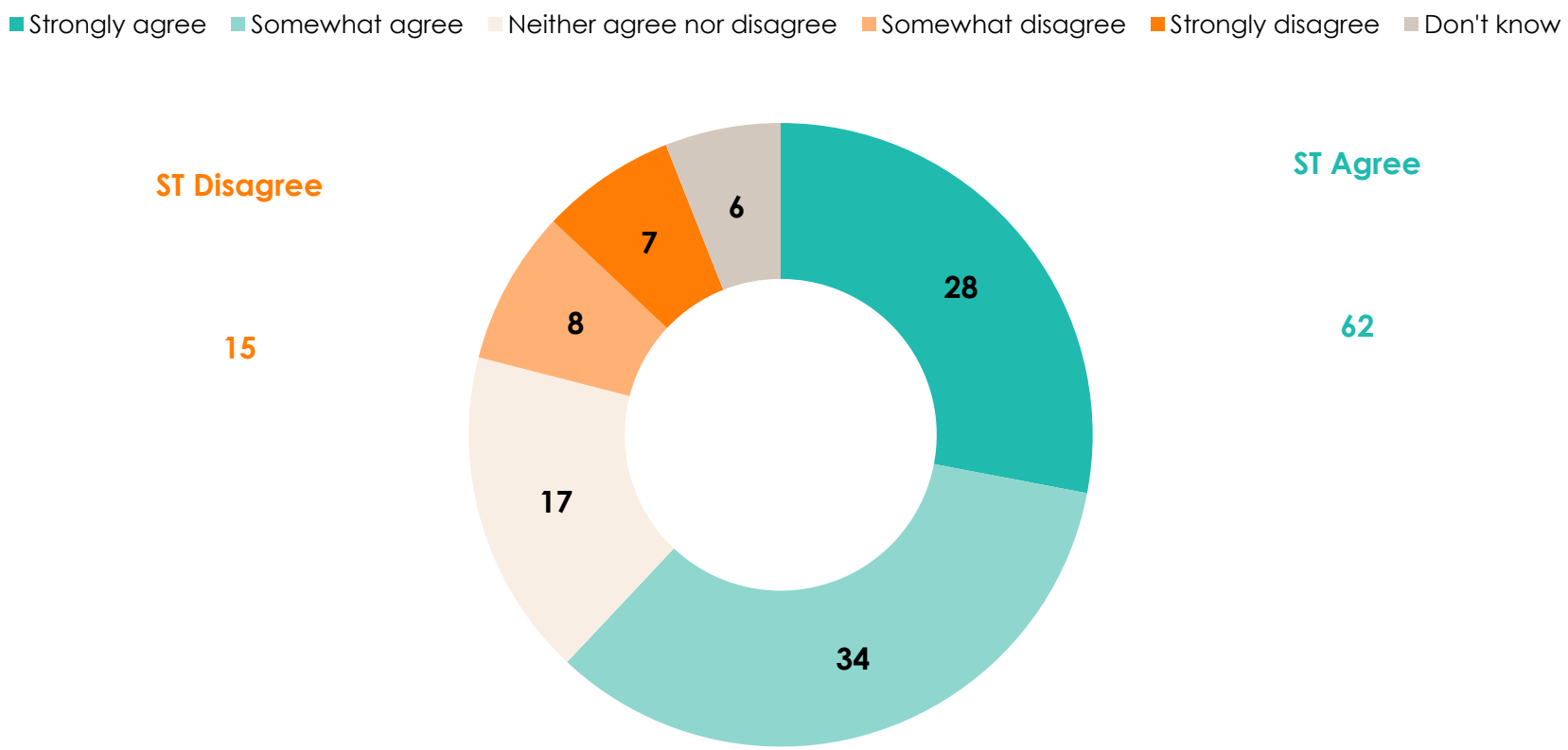


A clear majority in the UK supports reducing dependence on fossil-fuel vehicles

Q3b - Do you agree or disagree that the United Kingdom should gradually reduce our dependence on fossil fuel-powered vehicles over the coming decade?



New question in wave 2

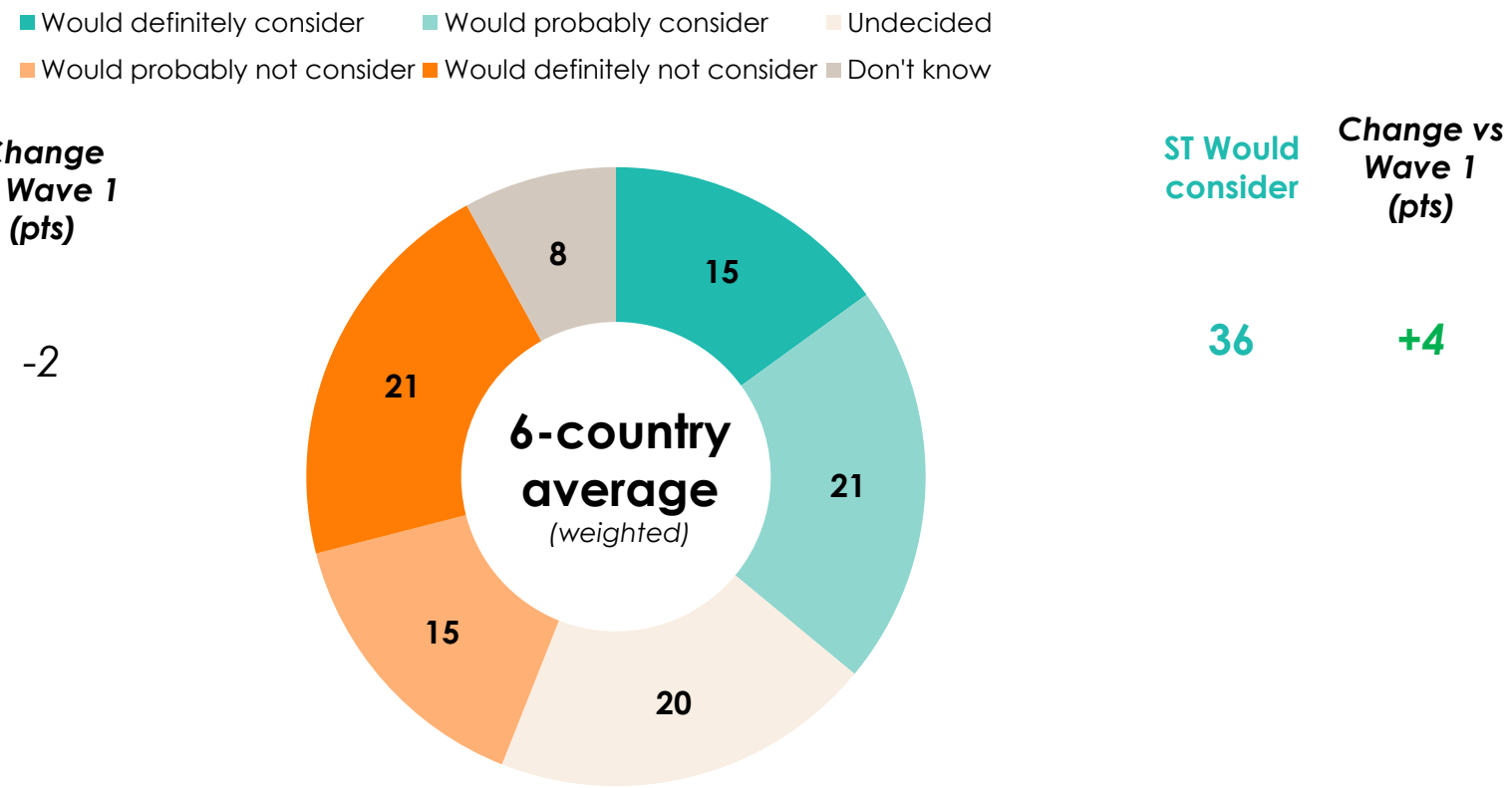


2.

EVs: rising fuel prices are strengthening purchase consideration and support for public action

Consideration of fully electric vehicles has increased, with consumers now evenly divided

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)?

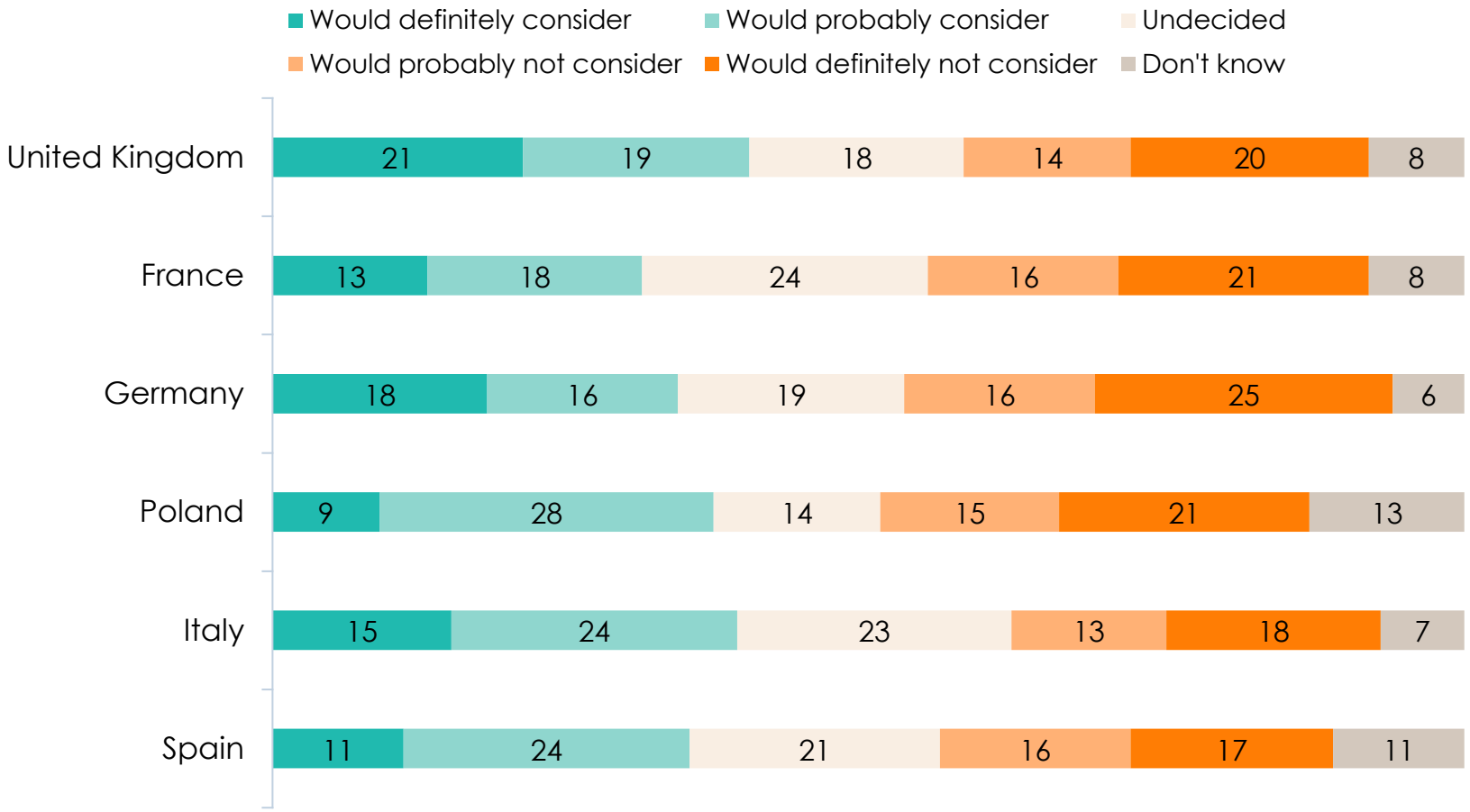


ST Would not consider	Change vs Wave 1 (pts)
36	-2

ST Would consider	Change vs Wave 1 (pts)
36	+4

Consideration of fully electric vehicles has increased across all six countries

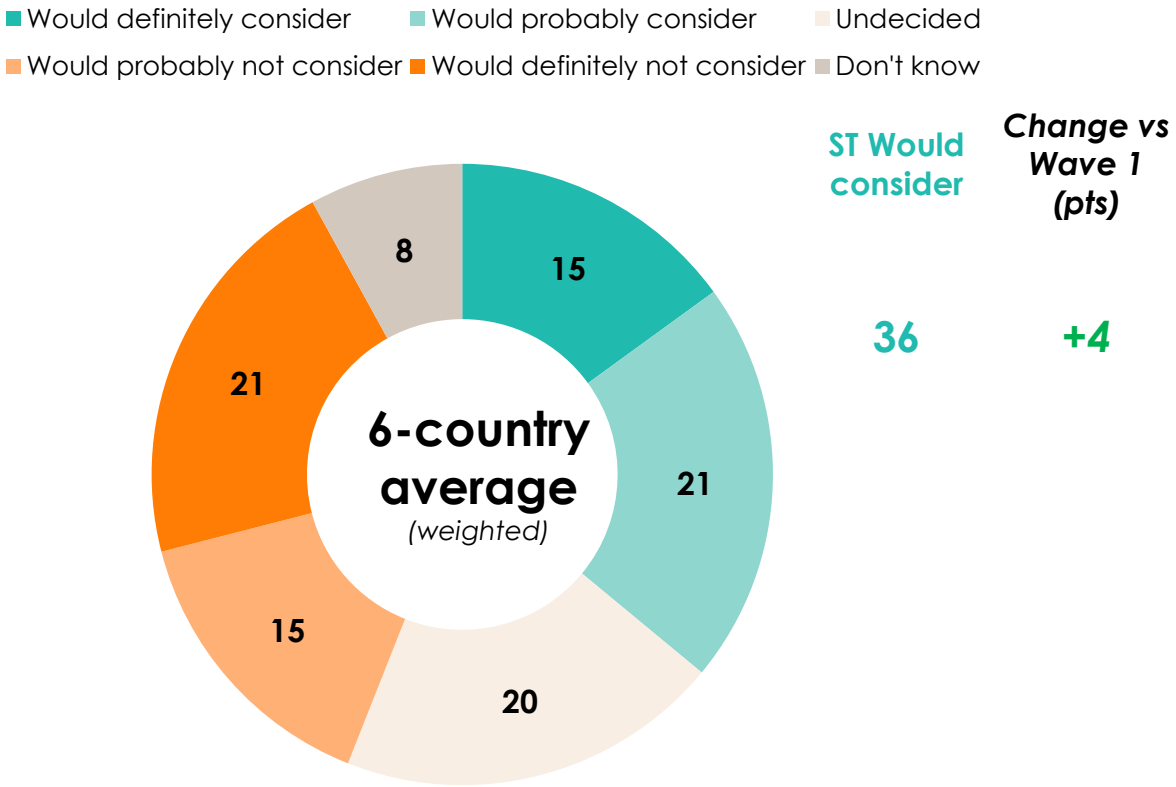
Q4 - Thinking about the next car you will buy or rent, to what extent would you consider buying a fully electric vehicle (ie not a hybrid)?



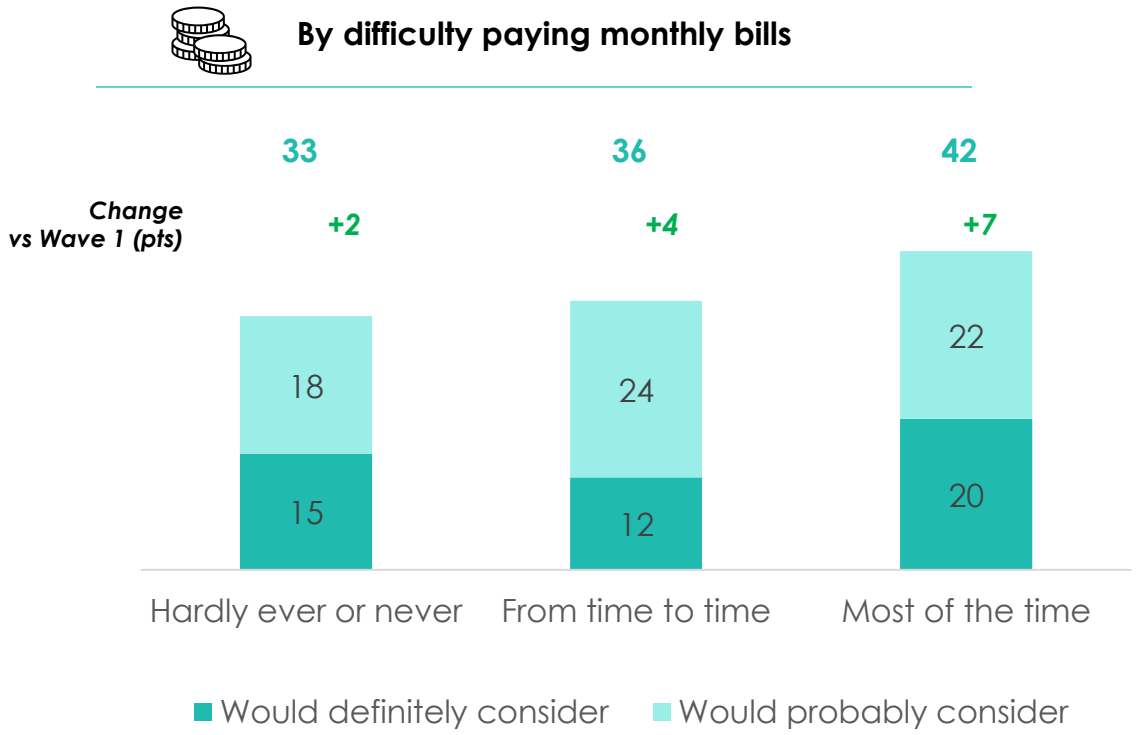
	ST Would consider	*Change vs Wave 1 (pts)*
United Kingdom	40	+7
France	31	+4
Germany	34	+4
Poland	37	+5
Italy	39	+2
Spain	35	+1

Financially vulnerable households show the strongest and fastest-growing interest in electric vehicles

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)?



ST Would consider	Change vs Wave 1 (pts)
36	+4

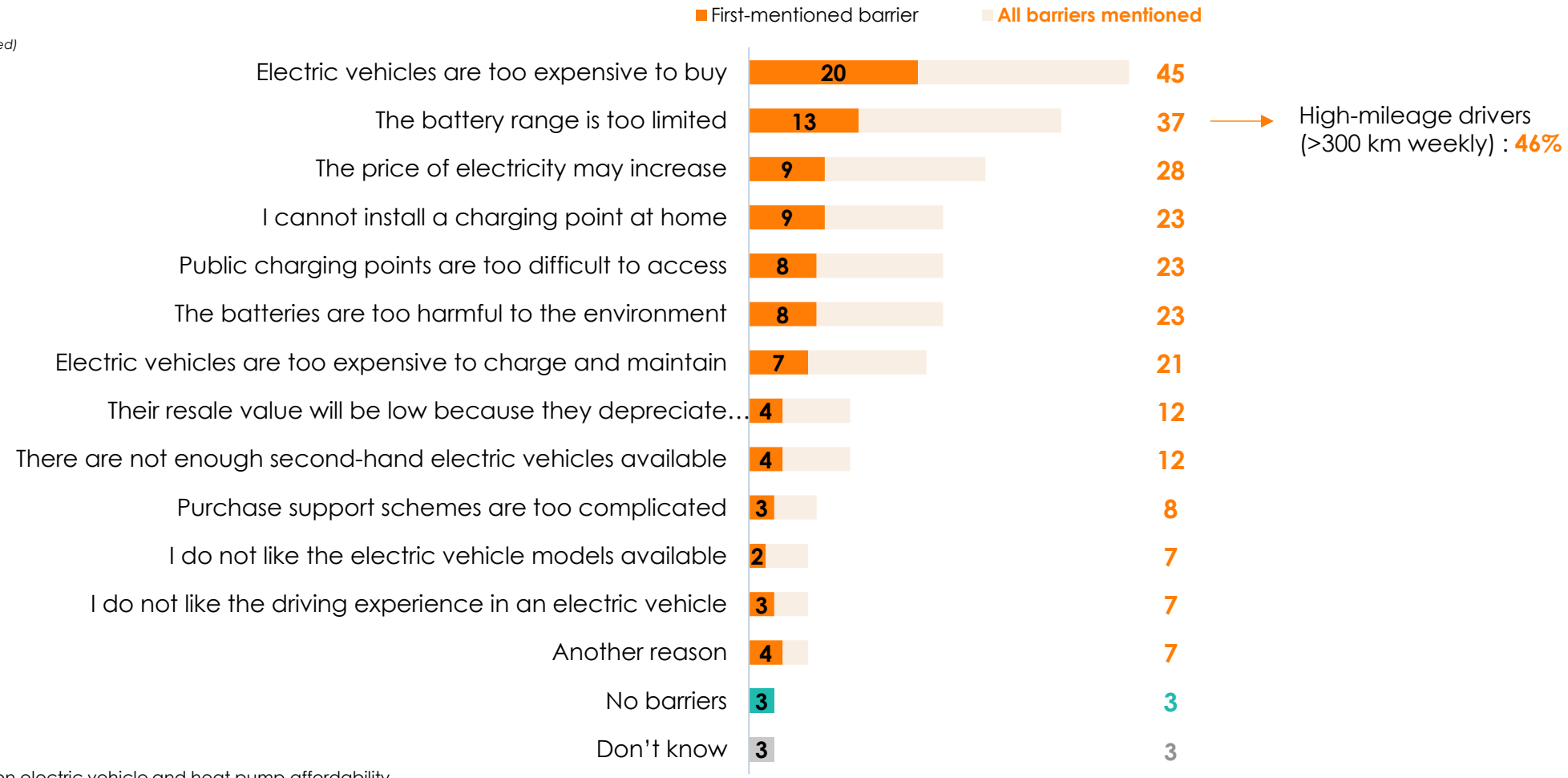


Purchase price and battery range are the leading barriers to electric vehicle adoption

Q19 - What are the main barriers preventing you from considering buying a fully electric vehicle?

6-country average *(weighted)*

New question in wave 2



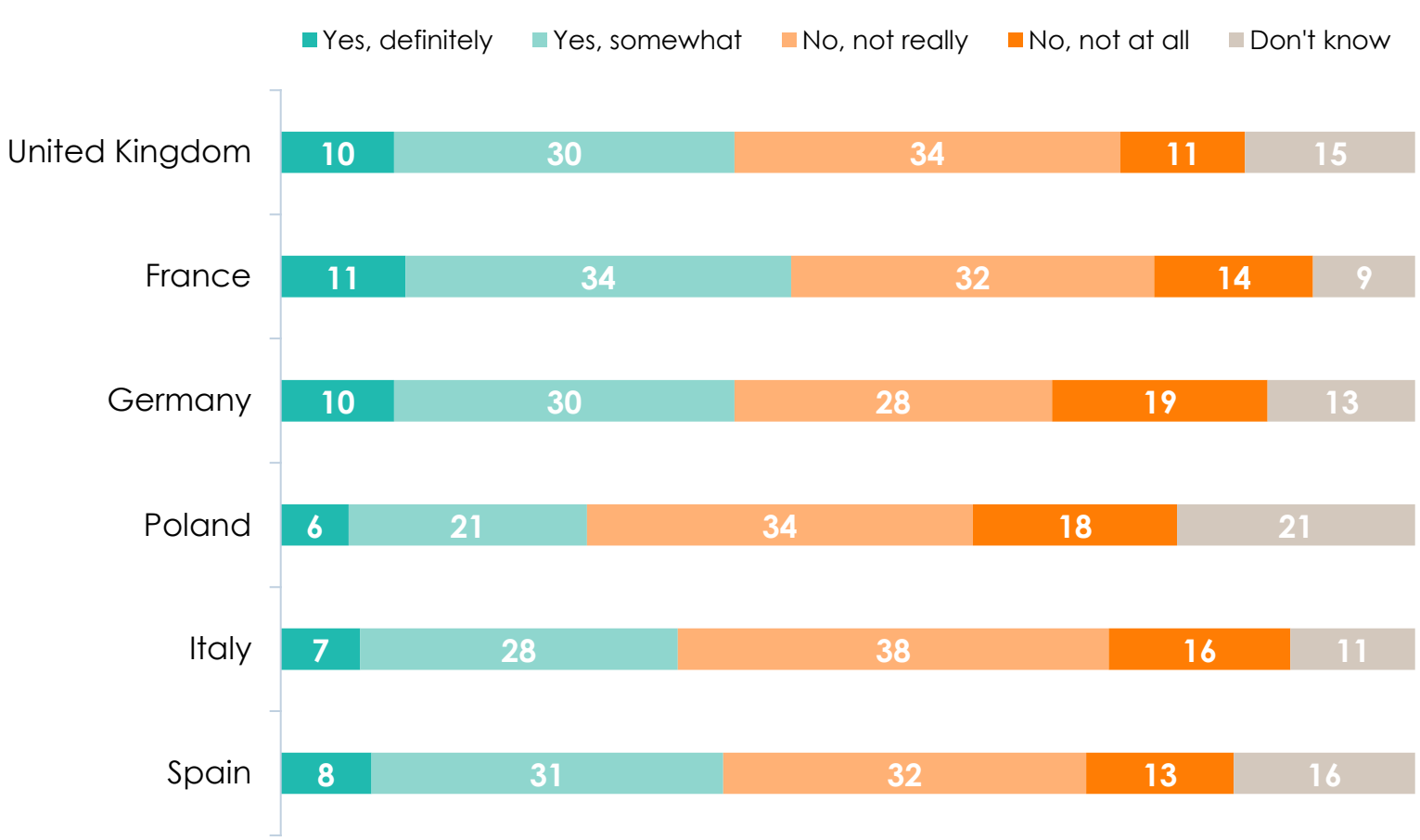
High purchase costs are the leading barrier in every country

Q19 - What are the main barriers preventing you from considering buying a fully electric vehicle?

% All barriers mentioned	United Kingdom	France	Germany	Poland	Italy	Spain
Electric vehicles are too expensive to buy	**43**	**54**	**41**	**41**	**45**	**42**
The battery range is too limited	**33**	**47**	**35**	**30**	**37**	**36**
The price of electricity may increase	**24**	**32**	24	**34**	**28**	**28**
Public charging points are too difficult to access	26	17	20	25	23	27
The batteries are too harmful to the environment	17	28	26	19	23	24
I cannot install a charging point at home	22	18	**30**	19	21	24
Electric vehicles are too expensive to charge and maintain	22	17	16	24	27	23
There are not enough second-hand electric vehicles available	15	10	13	12	12	10
Their resale value will be low because they depreciate significantly	16	11	12	14	11	7
Purchase support schemes are too complicated	6	8	8	10	8	10
I do not like the electric vehicle models available	6	4	9	7	6	7
I do not like the driving experience in an electric vehicle	6	7	6	5	8	7
Another reason	10	7	8	5	4	7
No barriers	5	2	5	2	3	2
Don't know	2	2	3	4	3	4

Electric vehicles are increasingly perceived as offering protection from rising energy prices

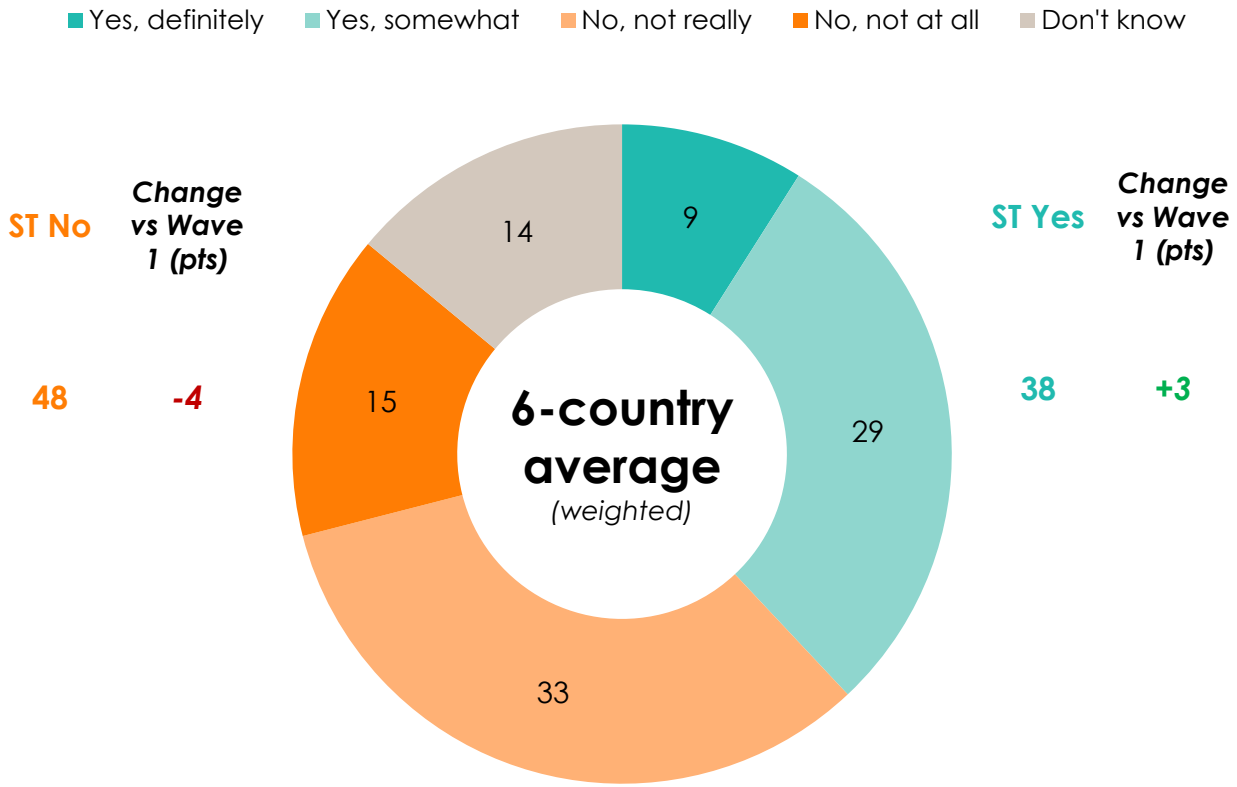
Q6 - In your opinion, are households that use electric vehicles better protected than others against the current rise in energy prices?

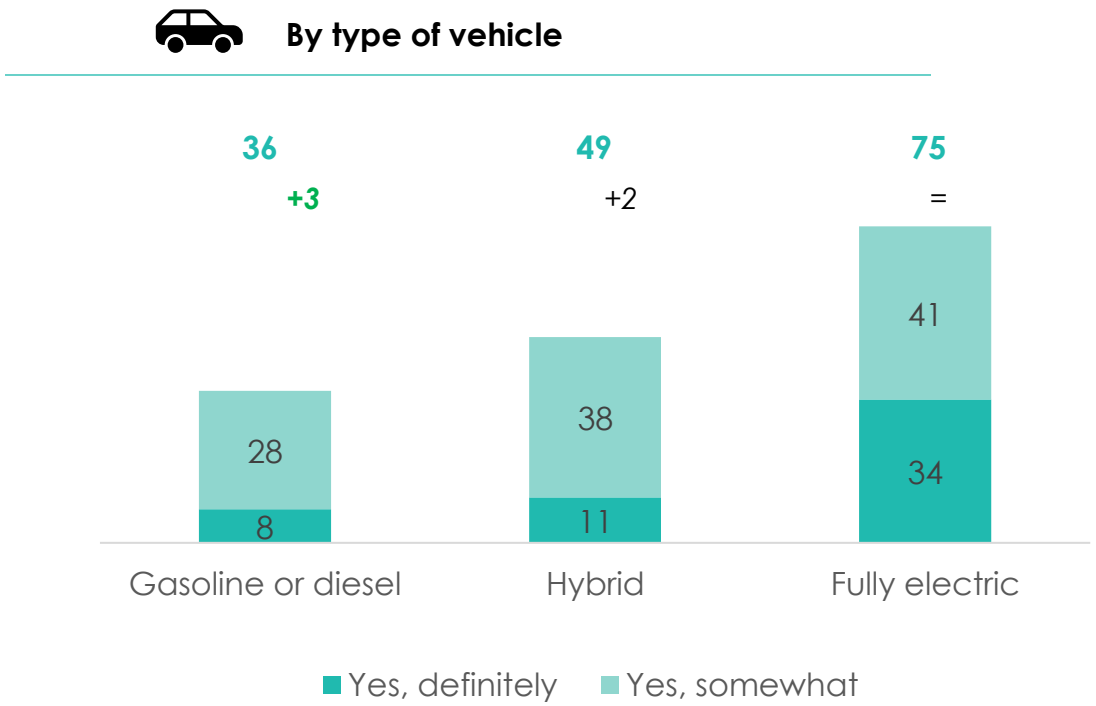


	ST Yes	*Change vs Wave 1 (pts)*
United Kingdom	40	*+1*
France	45	**+4**
Germany	40	**+3**
Poland	27	**+3**
Italy	35	**+8**
Spain	39	+2

Perceptions that EVs offer protection from rising energy prices are edging up, mainly among petrol and diesel drivers

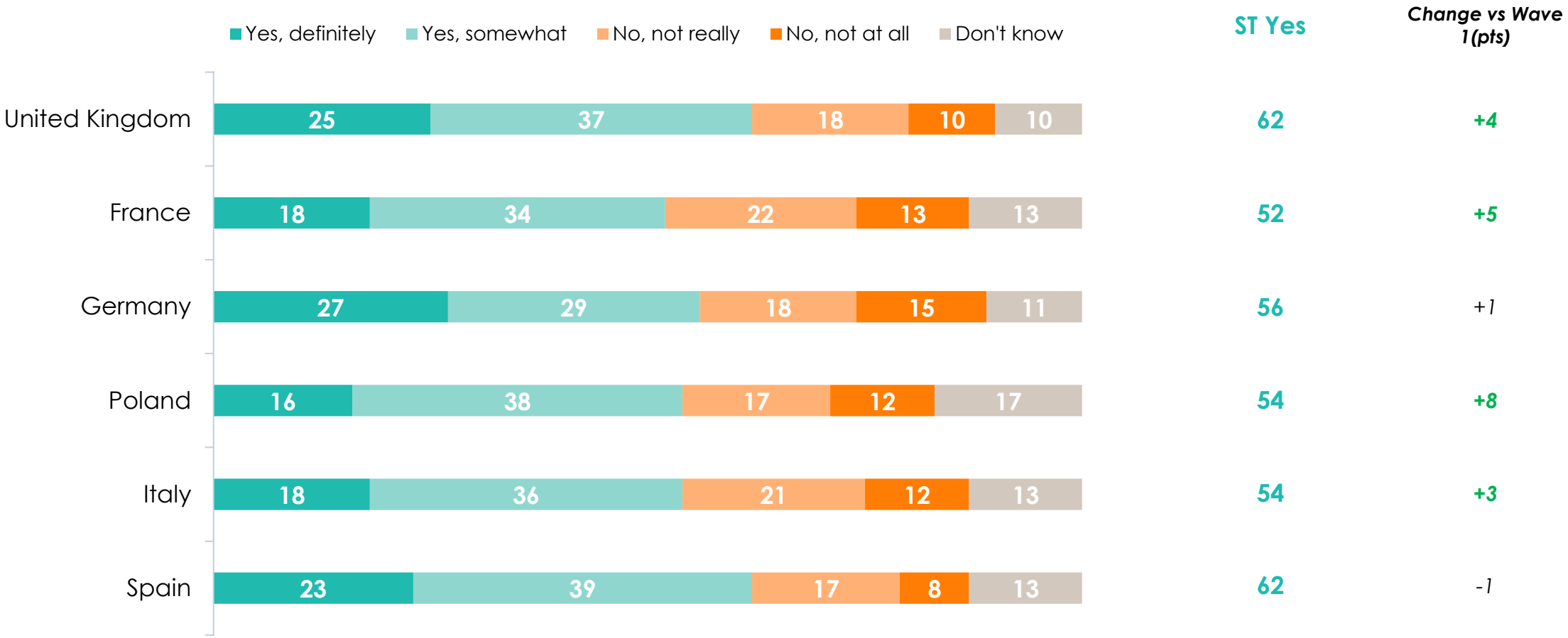
Q6 - In your opinion, are households that use electric vehicles better protected than others against the current rise in energy prices?





A majority in all countries supports government action to encourage electric vehicle uptake

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

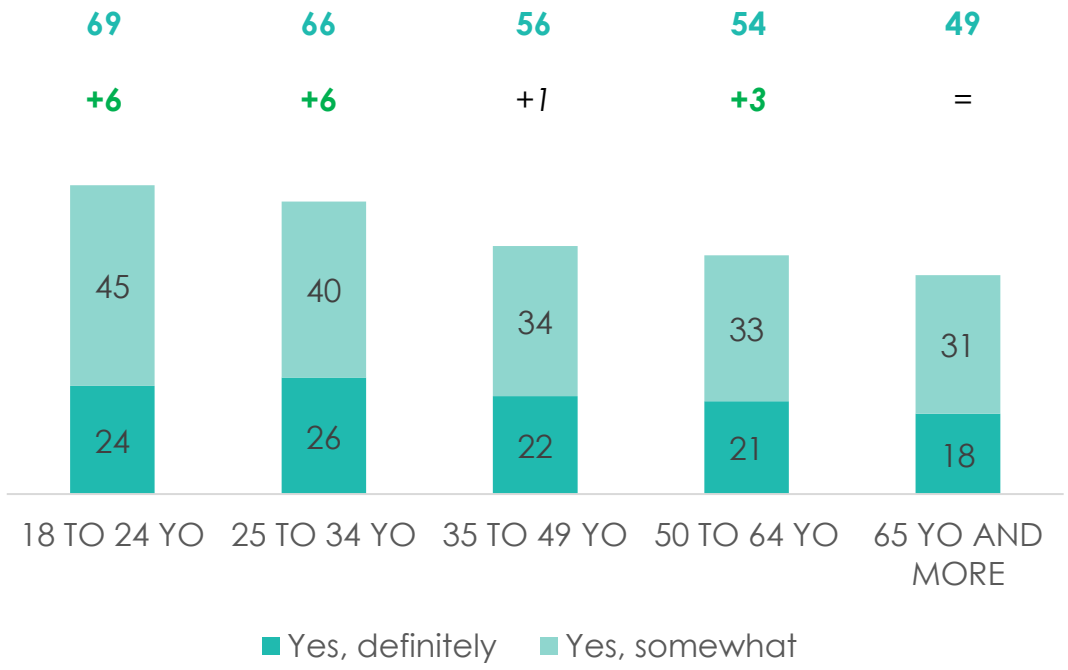


Support for government action on EVs is strongest among younger people and electric vehicle owners

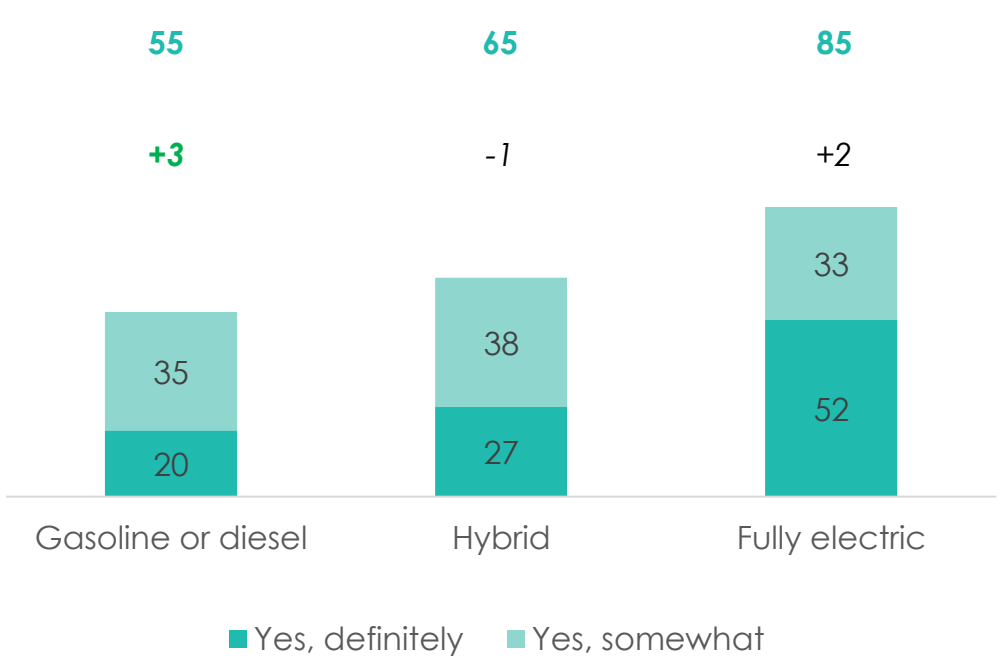
Q7 - Do you believe that the Government in your country should support and encourage the uptake of electric vehicles?

6-country average *(weighted)*

% ST Yes by age



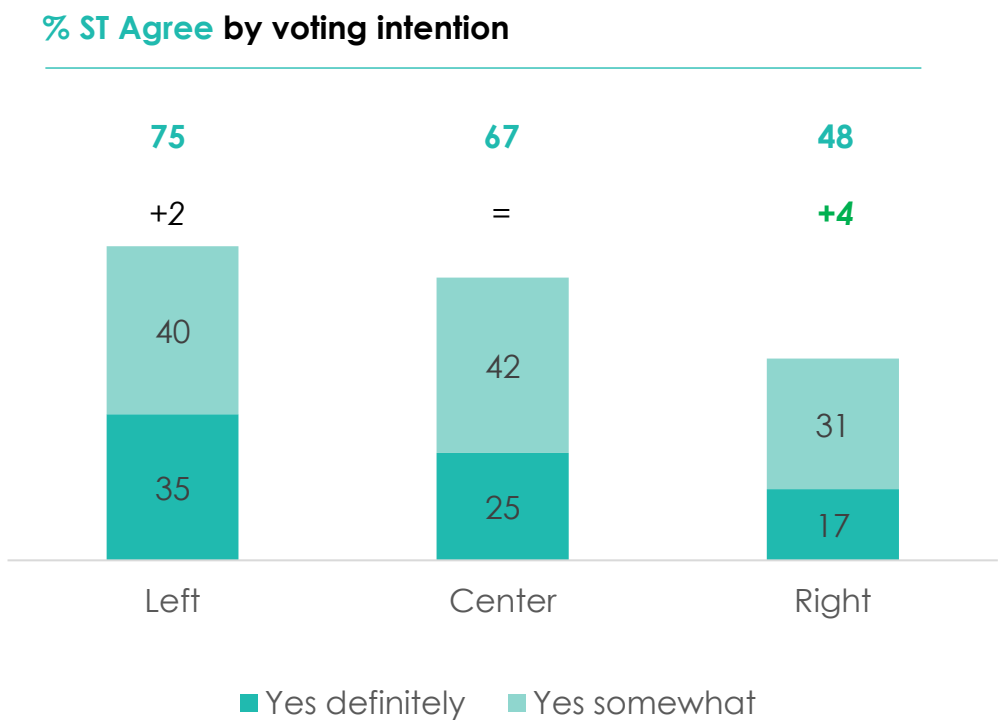
% Yes by vehicle type



Although support for government action on EVs remains lower among right-wing voters, it is rising more strongly among them

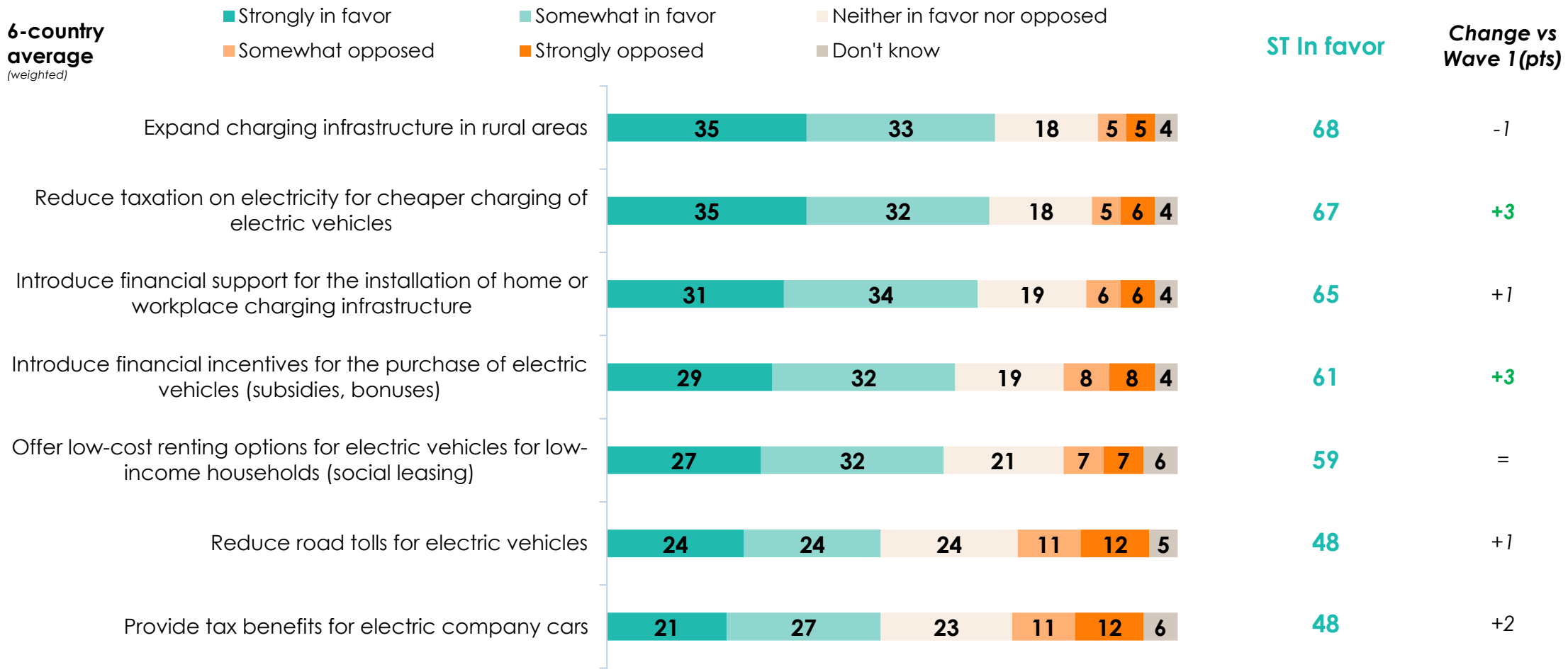
Q7 - Do you believe that the Government in your country should support and encourage the uptake of electric vehicles?

6-country average *(weighted)*



Charging infrastructure and lower charging costs attract the broadest support

Q8 - Are you in favor or opposed to each of the following measures?



Support for electric vehicle incentives varies by measure and country

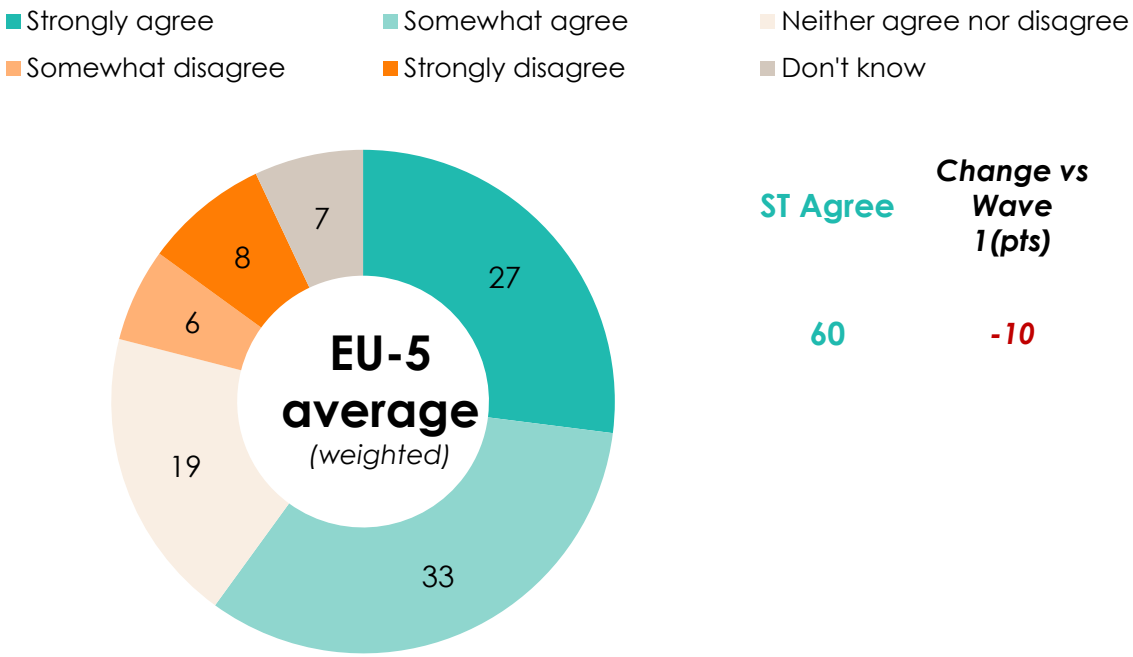
Q8 - Are you in favor or opposed to each of the following measures?

% In favor	6-country average		UK		France		Germany		Poland		Italy		Spain	
	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.
Expand charging infrastructure in rural areas	**68**	-1	69	-1	74	**+4**	67	=	66	**+6**	64	-3	71	-2
Reduce taxation on electricity for cheaper charging of electric vehicles	**67**	**+3**	62	+2	68	**+3**	64	**+5**	65	**+3**	70	=	69	+2
Introduce financial support for the installation of home or workplace charging infrastructure	**65**	+1	66	=	66	**+3**	59	-1	63	**+6**	65	-3	69	=
Introduce financial incentives for the purchase of electric vehicles (subsidies, bonuses)	**61**	**+3**	61	+2	60	**+3**	56	**+5**	61	**+8**	61	-3	66	=
Offer low-cost renting options for electric vehicles for low-income households (social leasing)	**59**	=	54	=	60	+1	57	+1	60	**+3**	61	-2	63	=
Reduce road tolls for electric vehicles	**48**	+1	48	**+5**	42	=	-	-	54	**+7**	50	-3	49	-3
Provide tax benefits for electric company cars	**48**	+2	47	**+3**	47	+3	39	**+6**	53	**+3**	56	-1	55	-2

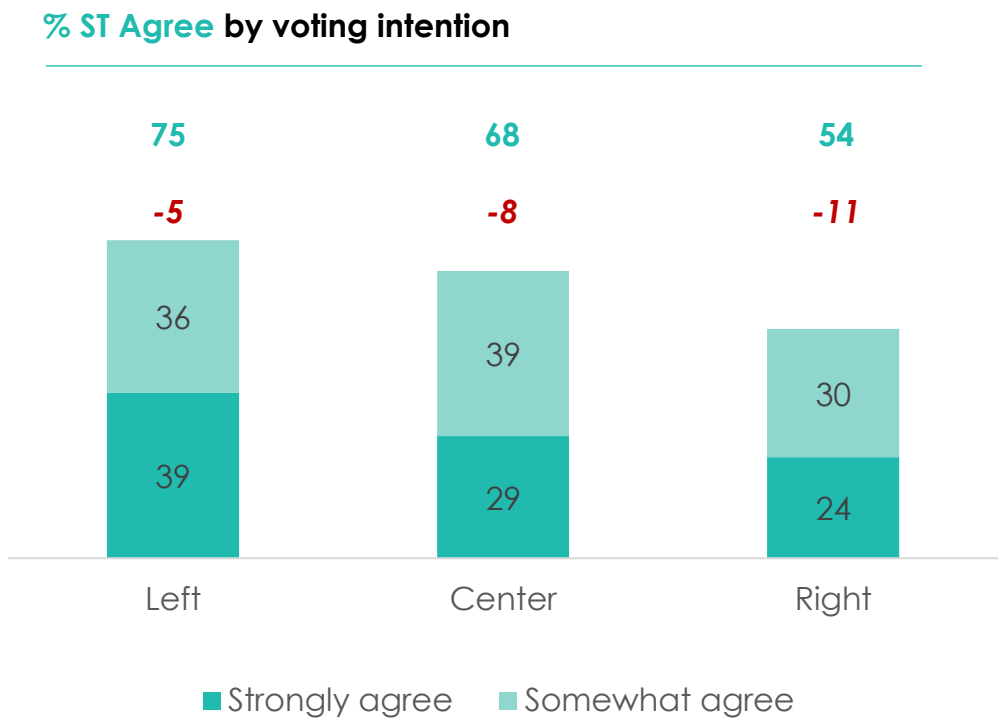
Support for requiring more affordable electric vehicles remains substantial

Q9 - Do you think the European Union should require car manufacturers to offer more affordable electric vehicles, i.e. by sticking to the 2035 CO2-regulation target? *

*Caution: the reference to the 2035 CO_2 target was added in Wave 2. Comparisons with Wave 1 should therefore be treated as indicative only.



ST Agree	*Change vs Wave 1 (pts)*
60	*-10*



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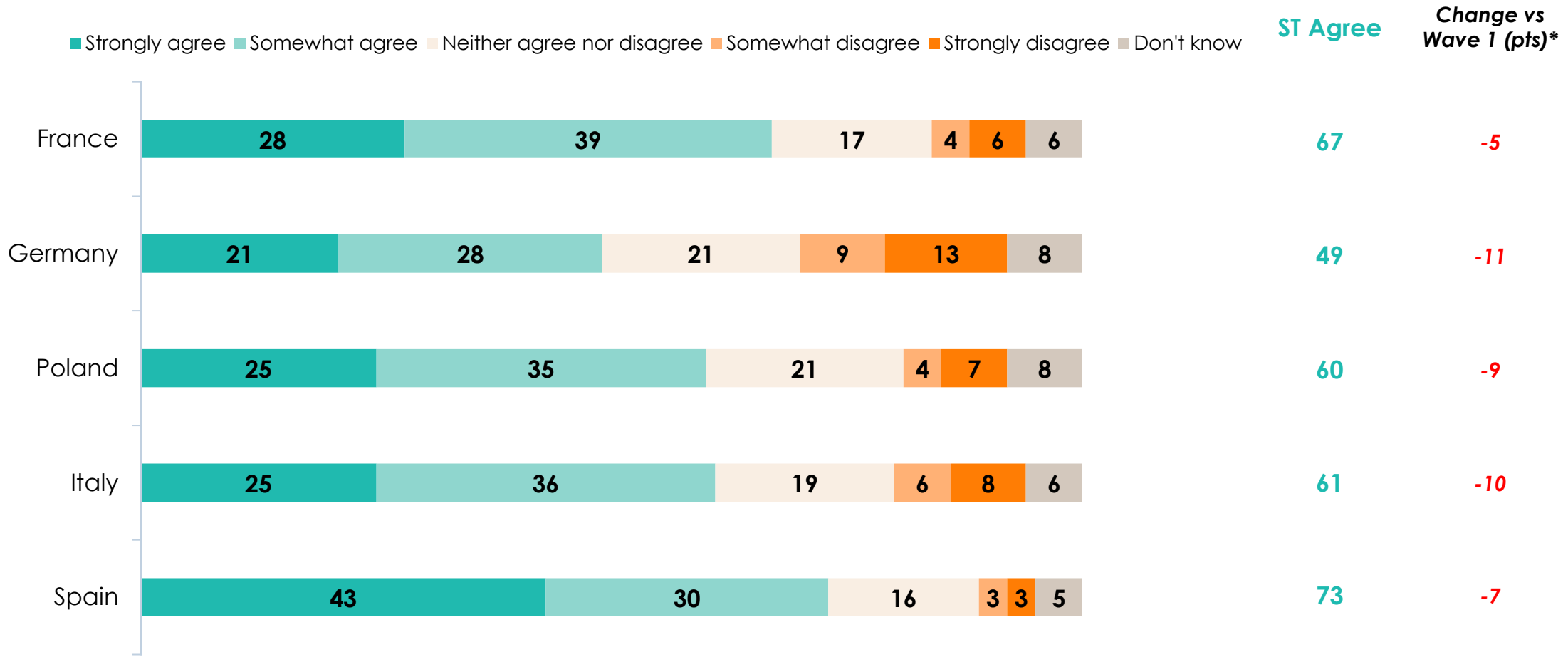
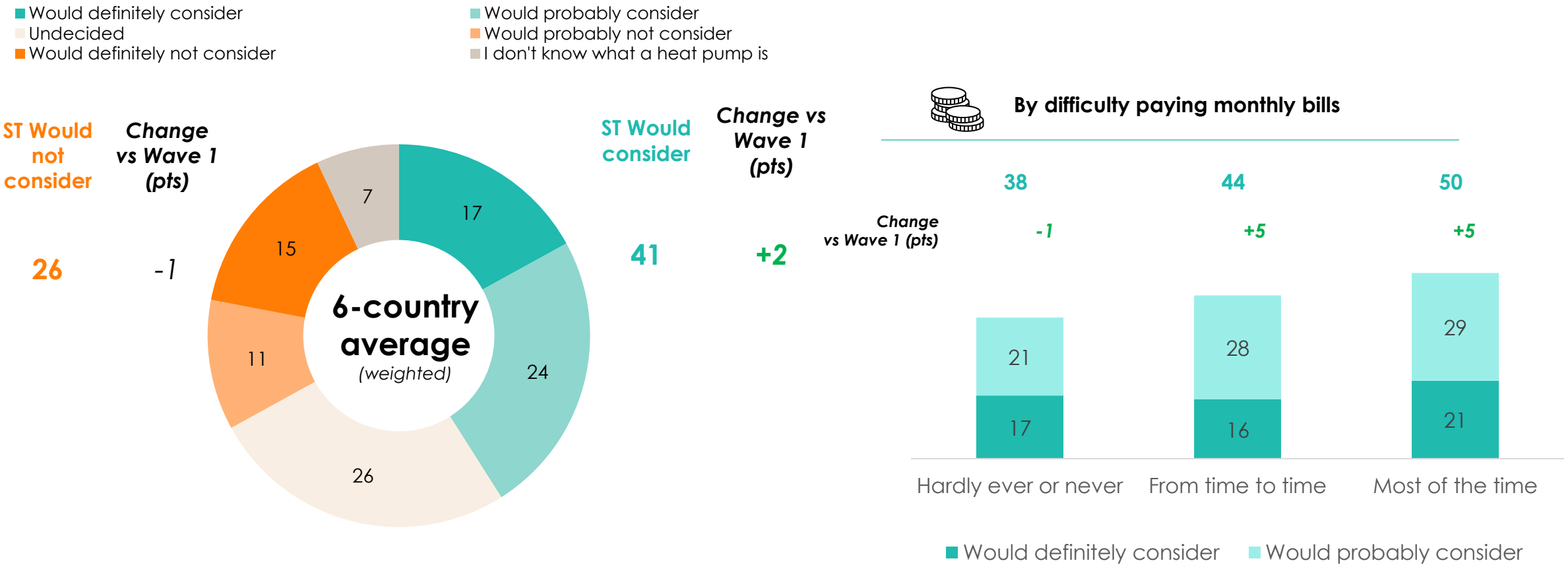


3.

Heat pumps: consideration is increasing, but upfront costs remain a major barrier

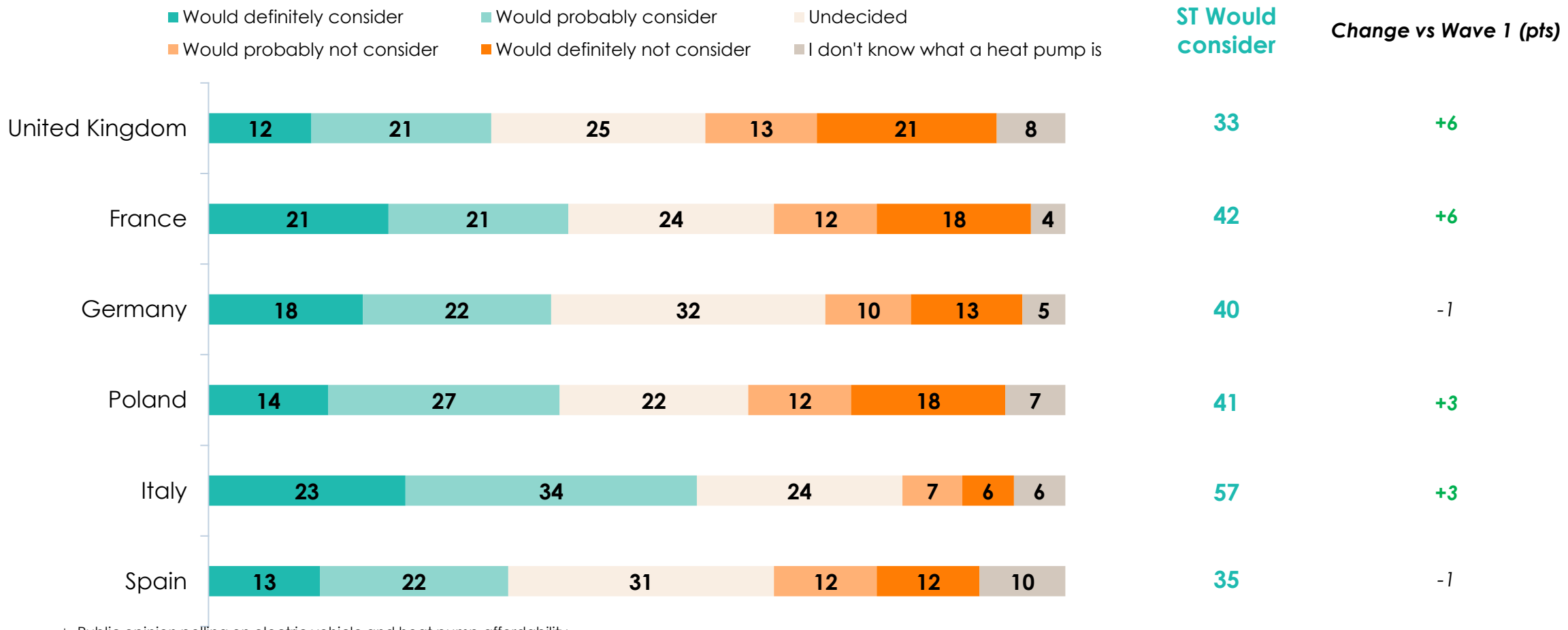
Consideration of heat pumps is rising most among households facing financial difficulties

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?



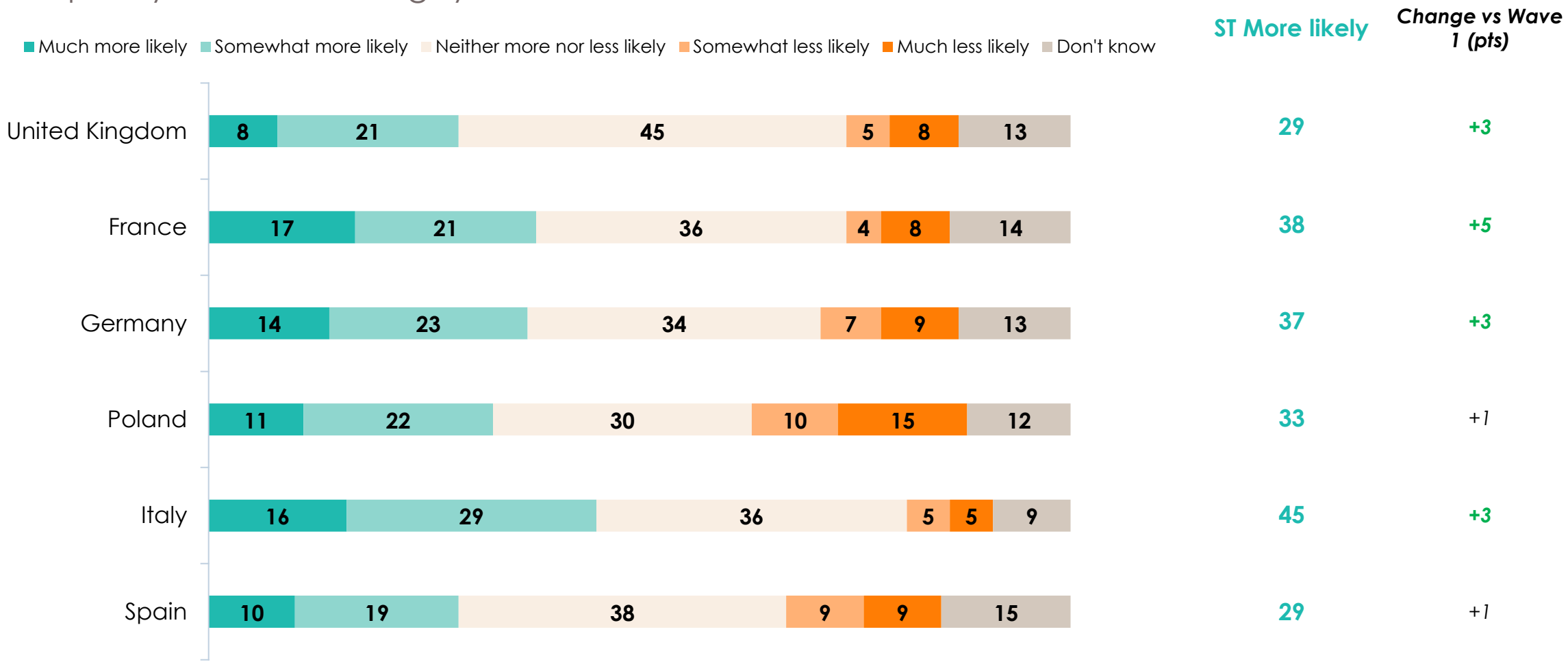
Consideration of heat pumps has increased in four countries and is highest in Italy

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?



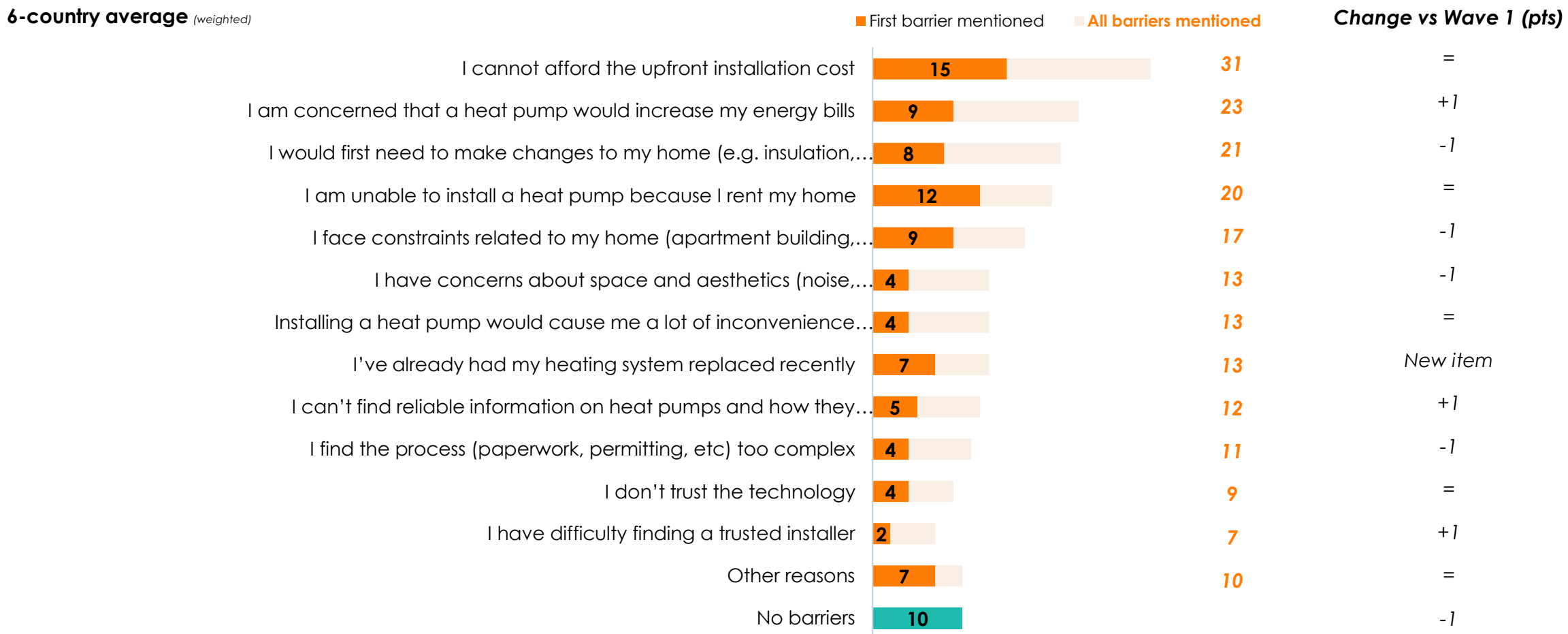
Rising energy prices are making heat pumps more attractive across all six countries

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 installation costs remain the main barrier to heat pump adoption

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



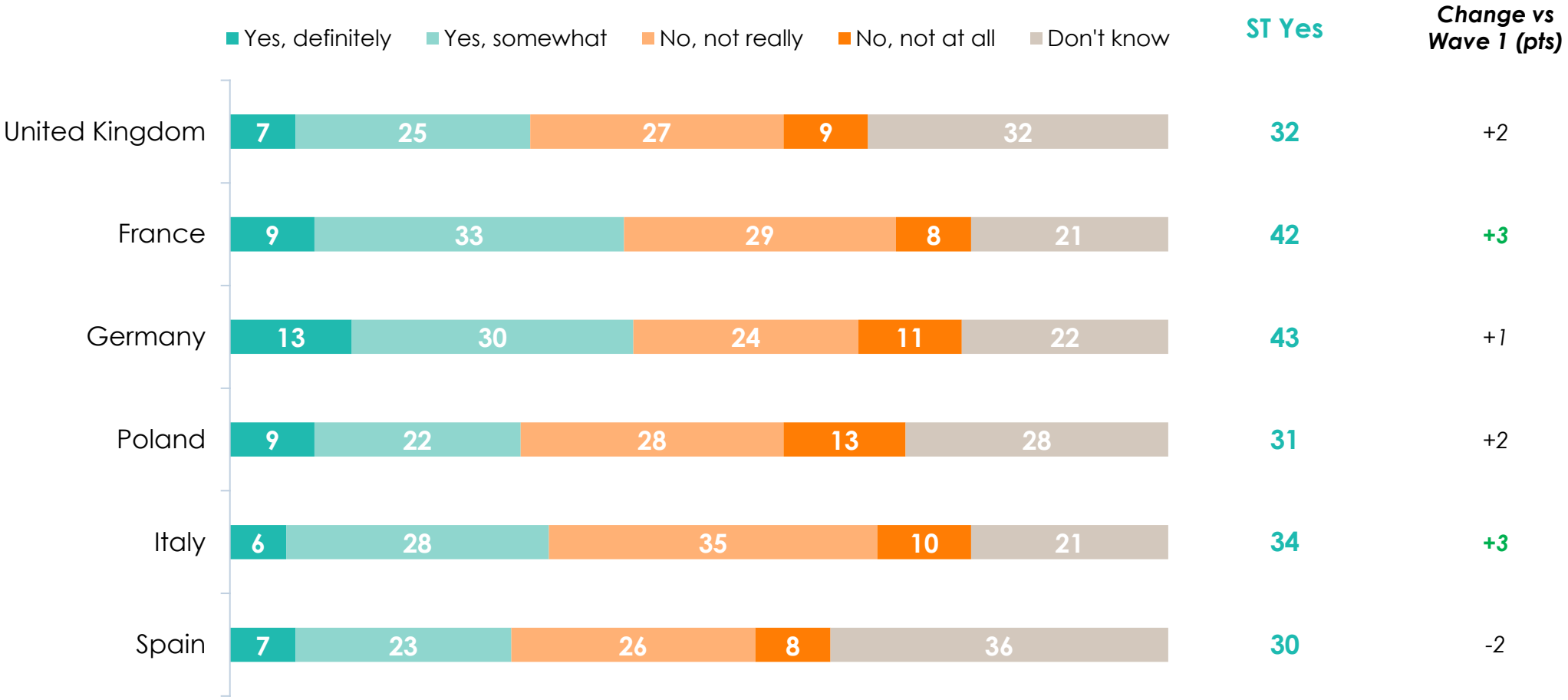
Installation costs lead in every country, while housing constraints vary markedly

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

% All barriers mentioned	United Kingdom		France		Germany		Poland		Italy		Spain	
	Wave 2	*Evol.*	Wave 2	*Evol.*	Wave 2	*Evol.*	Wave 2	*Evol.*	Wave 2	*Evol.*	Wave 2	*Evol.*
I cannot afford the upfront installation cost	**39**	-2	**32**	+2	24	=	**32**	*+1*	**30**	*-1*	**29**	+3
I am concerned that a heat pump would increase my energy bills	22	=	14	*-2*	17	=	29	=	29	+2	**29**	*+5*
I would first need to make changes to my home (e.g. insulation, replacing radiators)	25	-2	15	=	20	*+1*	18	-2	26	*-1*	24	*-1*
I face constraints related to my home (apartment building, collective ownership)	12	*+1*	17	*-1*	16	-2	**32**	+2	18	-2	16	*-1*
I am unable to install a heat pump because I rent my home	16	*-1*	20	*-1*	**37**	=	12	-2	12	*+1*	12	*+1*
I've already had my heating system replaced recently	15	-	14	-	12	-	14	-	15	-	10	-
I have concerns about space and aesthetics (noise, appearance, etc)	21	*-4*	14	+2	11	+2	8	-2	10	*-3*	11	-3
Installing a heat pump would cause me a lot of inconvenience (mess, time, noise)	23	+2	9	*-4*	9	=	9	=	12	+3	13	=
I can't find reliable information on heat pumps and how they perform	16	*+1*	8	*-1*	8	+3	11	*-1*	13	=	15	*+1*
I don't trust the technology	13	*-1*	6	*-1*	8	*+1*	13	*-1*	5	-2	8	*+1*
I find the process (paperwork, permitting, etc) too complex	6	*-1*	12	=	12	*+1*	12	=	12	*-3*	14	*-1*
I have difficulty finding a trusted installer	8	=	6	=	5	=	7	*+1*	7	*+1*	7	*-1*
Other reasons	8	-2	13	=	11	=	8	=	7	=	11	*-1*
No barriers	7	=	12	*-1*	8	-3	6	=	14	+2	11	-3

Heat pumps are increasingly perceived as offering protection from rising energy prices

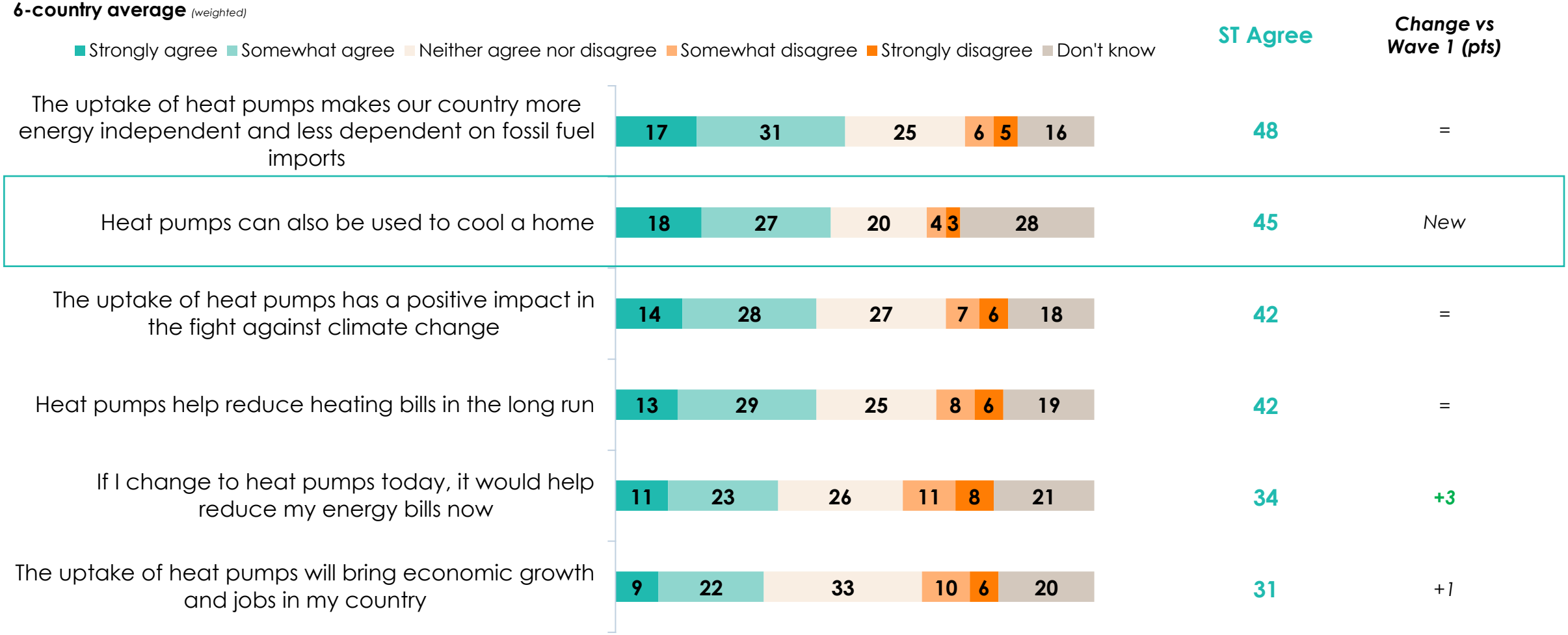
Q13 - And in your opinion, are households with a heat pump better protected than others against rise in energy prices?



Energy independence is the most widely recognised benefit of heat pumps

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

6-country average *(weighted)*



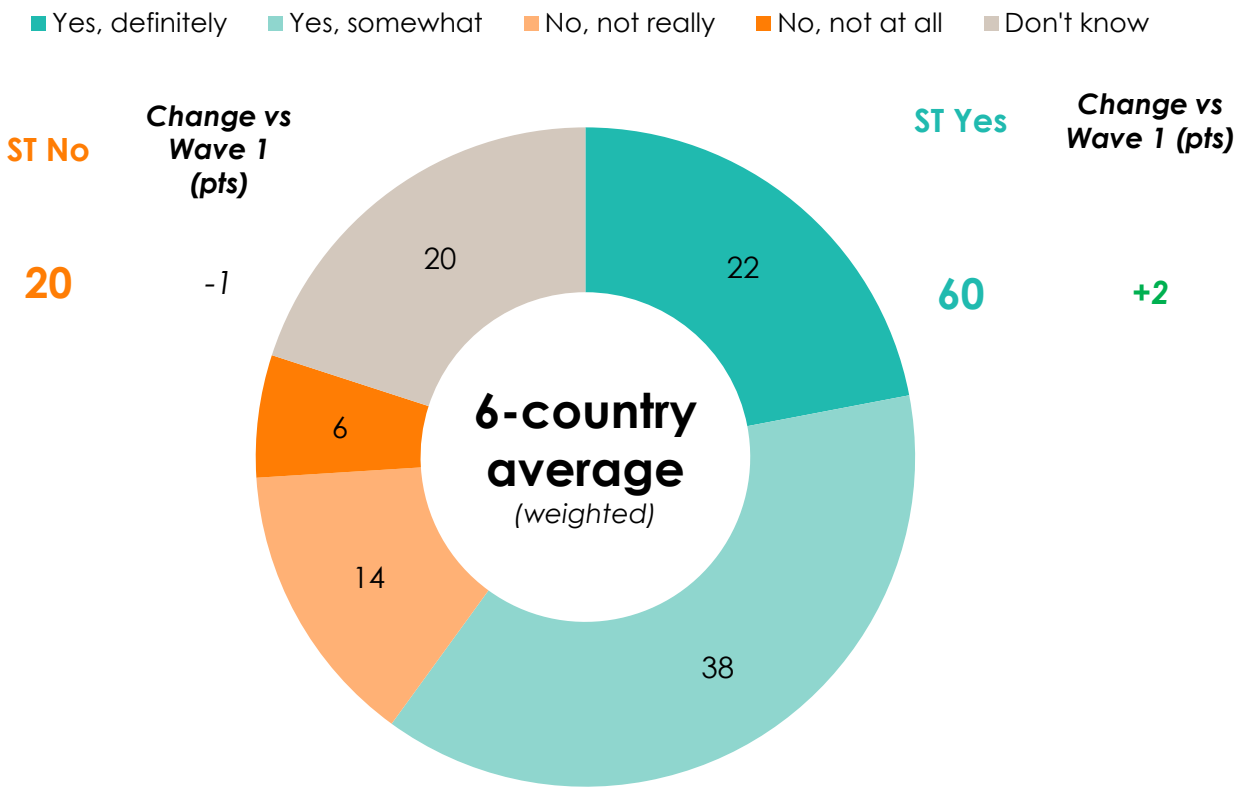
Perceived benefits of heat pumps improve in Poland

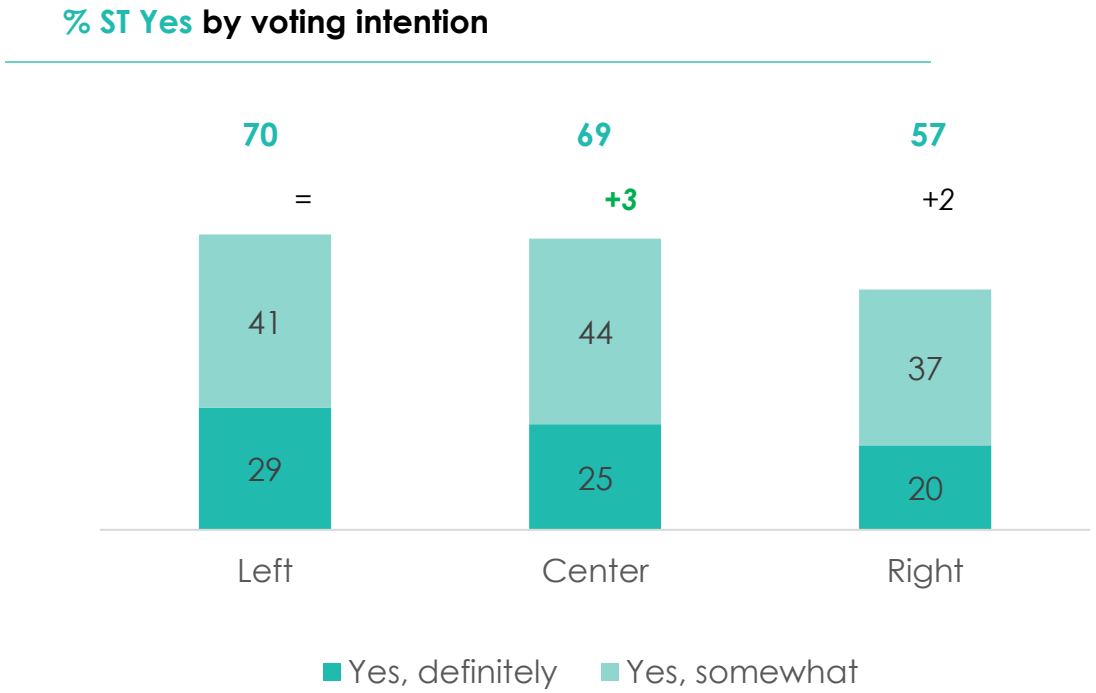
Q14 - Do you agree or disagree with each of the following statements?

ST Agree	6-country average		UK		France		Germany		Poland		Italy		Spain	
	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.	Wave 2	Evol.
The uptake of heat pumps makes our country more energy independent and less dependent on fossil fuel imports	**48**	=	44	-2	56	+2	50	=	50	**+5**	44	=	44	=
Heat pumps can also be used to cool a home	**45**	-	35	-	57	-	41	-	46	-	55	-	41	-
The uptake of heat pumps has a positive impact in the fight against climate change	**42**	=	42	+1	43	**+3**	43	**-4**	48	**+3**	38	=	35	-1
Heat pumps help reduce heating bills in the long run	**42**	=	39	+1	51	**+4**	44	-2	42	**+5**	37	**-4**	34	-2
If I change to heat pumps today, it would help reduce my energy bills now	**34**	**+3**	28	=	40	**+4**	38	**+5**	31	+2	32	+1	26	**-5**
The uptake of heat pumps will bring economic growth and jobs in my country	**31**	+1	30	-1	38	**+4**	32	+1	32	+2	27	+1	26	-2

Majorities in most countries support public action to encourage heat pump installation

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





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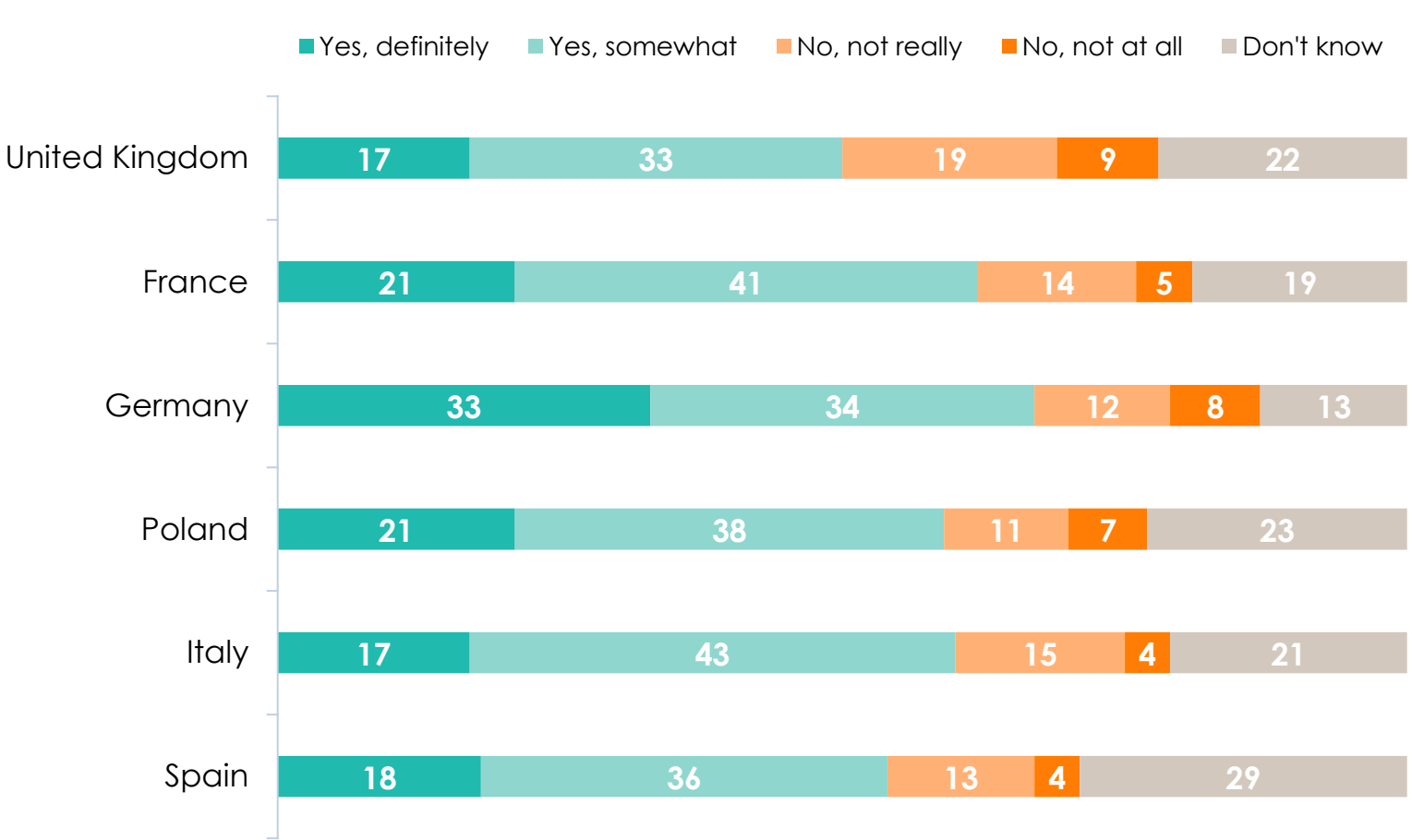
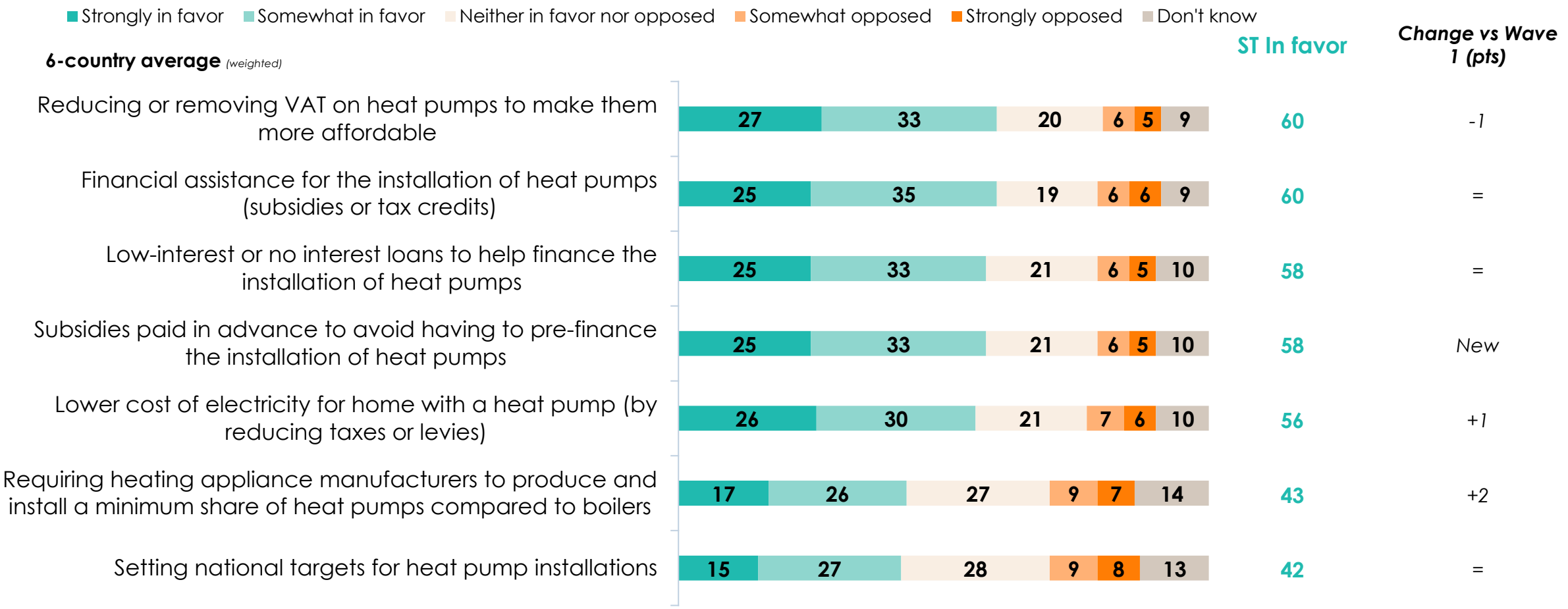


	ST Yes	*Change vs Wave 1 (pts)*
United Kingdom	50	-1
France	62	+3
Germany	67	-1
Poland	59	+4
Italy	60	+2
Spain	54	=

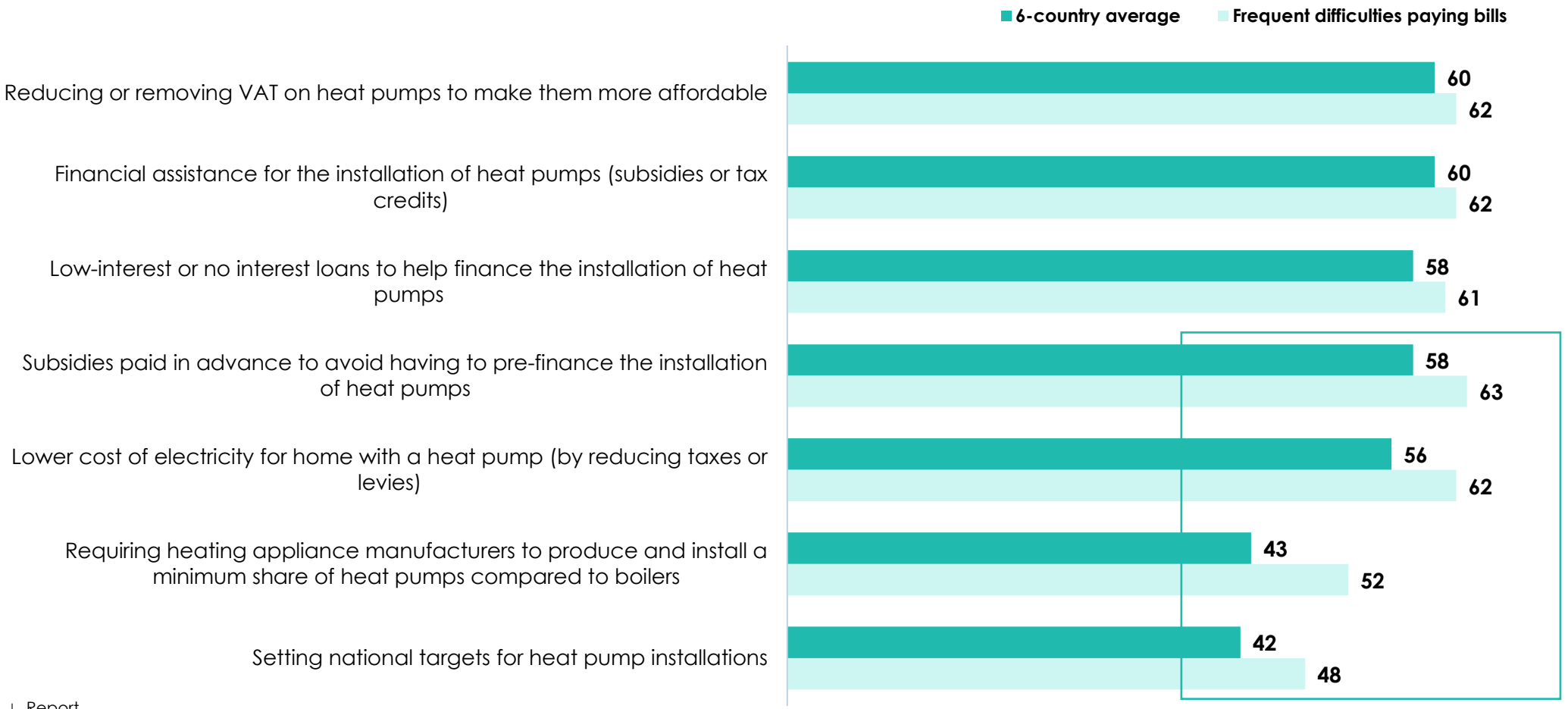
Financial incentives and lower running costs are the most strongly supported heat pump measures

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



Financial hardship strengthens support for measures that make heat pumps more accessible

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



4.

Main take-aways

Main take-aways

1. As the energy crisis persists, pressure on household budgets is intensifying

The financial impact of the crisis has increased significantly across all six countries since June

- Between **67% and 84% of households** now report a significant impact on their budget.
- The increase is visible in every country, ranging from **+8 to +13 points**, with a particularly marked rise in **France**, where the proportion reporting a significant impact has increased to **75% (+13 points)**.
- **Italy (84%) and Spain (81%)** remain the most affected countries.
- The proportion describing the impact as **"very significant"** has also increased, suggesting that the crisis is not only affecting more households, but is being felt more acutely.

With winter approaching, many Europeans expect to adjust their behaviour in response to higher energy costs

- Across the six countries, **70% say they are likely to reduce their electricity consumption**, while **66% expect to heat some rooms less and 65% to turn down their heating** over the coming months.
- The impact may also extend beyond household energy use: **59% expect to postpone or forgo certain purchases**, and over half say they are likely to **drive more slowly to reduce fuel consumption (54%)**.
- By contrast, more structural responses remain less widely considered: **43% are likely to consider home improvements or energy-saving equipment, and only 38% expect to seek financial support related to energy**.
- These results suggest that households are preparing first and foremost to rely on **immediate, individual changes in consumption**, while fewer expect to access financial support or invest in longer-term improvements.

Main take-aways

Support for reducing dependence on fossil-fuel vehicles remains substantial

- Across the five EU countries surveyed, around **one in two respondents** agree that the European Union should gradually reduce its dependence on fossil-fuel vehicles. Opposition remains comparatively limited, despite the economic pressures facing households.
- In the United Kingdom, 62% believe that their country should reduce its dependence on fossil-fuel vehicles, showing that support for this transition extends beyond the EU countries surveyed.
- This suggests that the prolonged crisis has not undermined the broader objective of electrification, although its implementation must remain economically realistic for consumers.

As winter approaches, the pressure of rising energy costs is translating into widespread expectations of behavioural change, from reducing electricity and heating use to adjusting mobility and other household spending. Yet the relatively limited intention to seek financial support highlights the need to make available assistance more visible, accessible and straightforward.

Main take-aways

2. Electric vehicles: rising fuel prices are strengthening purchase intentions and support for public action

Consideration of fully electric vehicles has increased between June and November 2026

- The proportion considering a fully electric vehicle for their next car has risen to **40% in the United Kingdom (+7 points)**, **37% in Poland (+5)**, **34% in Germany (+4)** and **31% in France (+4)**.
- In **four of the six countries**, the proportion considering a fully electric vehicle is now higher than the proportion rejecting the option. **France and Germany** remain the exceptions, although the gap has narrowed in both countries.

Rising fuel prices are increasingly perceived as a reason to switch to an electric vehicle

- In every country, a growing proportion say that higher fuel prices make them more likely to consider purchasing an electric vehicle. This increase is particularly pronounced in the **United Kingdom (+7 points)** and **Germany (+8)**.

Electric vehicle owners are increasingly seen as better protected from rising energy prices

- This perception has strengthened in most countries. The increase is particularly marked in **Italy, where 35% now believe EV users are better protected (+8 points)**, and in **France, where the figure reaches 45% (+4)**.
- While this view is not yet dominant, it provides further evidence that the perceived economic case for electric vehicles is gaining ground.

Main take-aways

Affordability remains the main obstacle to adoption

- Across countries, the **upfront purchase price** remains the most frequently cited barrier to buying an electric vehicle, particularly in France.
- Concerns about **battery range** and the possibility of **higher electricity prices** also continue to weigh on purchase decisions.
- In **Germany**, the inability to install a charging point at home stands out as a particularly important constraint.

Public support for government action is consolidating

- Support for governments encouraging EV adoption, already at or above majority level in most countries in June, has strengthened further.
- The clearest increases are recorded in **Poland, at 54% (+8 points)**, **France, at 52% (+5)**, and the **United Kingdom, at 62% (+4)**.
- Support for specific EV policies also tends to be stable or increase, with particularly positive movements in **Poland** and, across several measures, **Germany**.

The prolonged energy crisis is strengthening the case for electric vehicles, but turning greater interest into adoption will still require lower purchase costs, accessible charging and protection against electricity price uncertainty.

Main take-aways

3. Heat pumps: adoption potential is also increasing, although installation costs remain decisive

Consideration of heat pumps has increased in several countries

- The proportion who would consider installing a heat pump when replacing their heating system has risen by **6 points in both the United Kingdom and France**, reaching **33% and 42%** respectively. Consideration has also increased in **Poland, to 41% (+3 points)**, and **Italy, to 57% (+3)**.
- Italy continues to show the highest adoption potential among the countries surveyed.

Upfront installation costs remain the main barrier

- The initial cost of installing a heat pump continues to be the most widely cited obstacle. Other barriers, including the need to adapt the home, concerns about future energy bills and constraints linked to housing type or tenure, also limit households' ability to act.
- The results confirm that increased interest will not automatically translate into adoption without effective financial support and practical assistance.

Heat pumps are increasingly perceived as providing protection from higher energy prices

- The proportion who believe that households with a heat pump are better protected from rising energy prices has increased in every country except Spain. This suggests that the economic benefit of heat pumps is becoming more visible as the energy crisis continues.

Main take-aways

Confidence in the long-term savings offered by heat pumps is strengthening in key countries

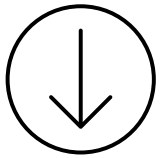
- Agreement that heat pumps help reduce heating bills in the long term has risen to **51% in France (+4 points)** and **42% in Poland (+5)**.
- Perceptions are more mixed elsewhere, showing that the financial case for heat pumps is not yet equally established across all countries.
- Views of their immediate impact on energy bills remain more uncertain than perceptions of their long-term benefits.

The mandate for public intervention remains strong

- Support for public authorities encouraging the installation of heat pumps was already at majority level in most countries in June and remains broadly stable. It has strengthened further in **France, reaching 62% (+3 points)**, and in **Poland, reaching 59% (+4)**.
- Financial assistance and lower running costs remain among the most effective and widely supported ways of encouraging uptake. The proposal to pay subsidies in advance (not asked in the first wave), removing the need for households to pre-finance heat pump installation, also receives a positive response: 58% support the measure across the six countries, with majority support in every country, ranging from 51% in the United Kingdom to 63% in France.

Heat pumps are gaining traction as a response to persistently high energy prices, but adoption remains conditional on reducing upfront costs and making the financial benefits clearer and more immediate for households.

Main take-aways



- **Six months into the crisis, electrification is increasingly viewed not only as a climate objective, but also as a way of reducing households' exposure to volatile fossil-fuel prices.**
- With winter approaching, **higher energy costs are already leading many Europeans to anticipate changes in their daily behaviour**, including reducing electricity and heating use, limiting certain purchases and changing the way they travel. However, fewer expect to seek financial support, pointing to a potential gap between the assistance available and households' ability or willingness to access it.
- Interest in both electric vehicles and heat pumps is progressing, perceptions of their protective benefits are strengthening, and support for public intervention remains high. However, the central challenge is unchanged: **households cannot act on this growing interest unless the upfront costs of electrification are reduced and the practical and financial benefits are made tangible.**
- **This second wave, conducted as households are beginning to turn their heating back on and may be increasingly concerned about the impact of energy prices on heating costs, therefore reinforces the policy mandate identified in June: accelerate electrification, while placing affordability, access and household protection at the centre of the transition.**