



European
Commission

Consumer Monitor 2023

EUROPEAN ALTERNATIVE FUELS OBSERVATORY



COUNTRY REPORT
DENMARK

Lieselot Vanhaverbeke, Dennis Verbist, Gabriela Barrera, VUB-MOBÍ Electromobility Research Centre
Máté Csukas, FIER, Rein Jürjado, EC-DG MOVE

June - 2024

EUROPEAN COMMISSION

Directorate-General for Mobility and Transport
Directorate B Investment, Innovative & Sustainable Transport
Unit B.4 — Sustainable and Intelligent transport

Contact: Rein Jüriado

E-mail: ec-alternative-fuels-observatory@ec.europa.eu

*European Commission
B-1049 Brussels*

Consumer Monitor 2023: Country Report: Denmark

Manuscript completed in June 2024

First edition

This document has been prepared for the European Commission however it reflects the views only of the authors, and the European Commission is not liable for any consequence stemming from the reuse of this publication.

Luxembourg: Publications Office of the European Union, 2024

© European Union, 2024



The reuse policy of European Commission documents is implemented by Commission Decision 2011/833/EU of 12 December 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39). Unless otherwise noted, the reuse of this document is authorised under a Creative Commons Attribution 4.0 International (CC BY 4.0) licence (<https://creativecommons.org/licenses/by/4.0/>). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.

PDF ISBN 978-92-68-17907-9 ISSN <xxxx-xxxx> doi:10.2832/062076 <xx-xx-xx-xxx-xx-x>

Contents

1. The 2023 Danish EAFO consumer monitor: key findings & conclusions	6
2. Consumer monitoring results: general population views on driving full-electric vehicles	11
2.1. Socio-demographics	11
2.2. Attitude and motivation towards battery electric vehicles.....	13
2.3. Main barriers and opportunities to adopt battery electric vehicles	13
2.4. Time frame to buy a battery electric vehicle	14
2.5. Willingness to pay and desired range of a battery electric vehicle.....	14
2.6. Support and governmental incentives to drive a battery electric vehicle	15
3. Consumer monitoring results: Mobility and recharging behaviour of battery electric drivers	17
3.1. Mobility behaviour and vehicle ownership	17
3.2. Purchase and lease price paid by BEV drivers	18
3.3. Factory range and range satisfaction of full-electric cars used by BEV drivers.....	19
3.4. BEV drivers recharging according to battery level and waiting time at public recharging points.....	20
3.5. Recharging location and frequency of use by BEV drivers	21
3.6. Important characteristics of a public recharging session for BEV drivers	22
3.7. BEV drivers' opinion and payment options at public recharging points	23
3.8. Main problems encountered by BEV drivers when travelling abroad...	24
3.9. Future trends: BEV drivers' awareness and interest in vehicle-to-grid capable vehicles	26
4. Surveyed countries and EU aggregated results & incentives overview	28
5. BEVs and recharging infrastructure in Denmark	34
6. Annex I: Consumer monitoring methodology & approach	36

1. The 2023 Danish EAFO consumer monitor: key findings & conclusions

The European Green Deal aims for a 90% reduction of greenhouse gas emissions for transport. Different policies are in place to achieve this goal, including standards on CO₂ vehicle emissions, public procurement rules, or the recently adopted Alternative Fuels Infrastructure Regulation (AFIR)^{1, 2, 3}. Nevertheless, in 2019, the transport sector was responsible for around one-quarter of the EU's total CO₂ emissions, 60.6% of which were emitted by passenger cars. The passenger car is still the main transport mode and has continued to increase its share since the year 2000⁴. 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.

For more than a decade, three main barriers have been identified regarding the mass up-take of passenger battery electric vehicles (BEVs): purchase price, driving range and availability of recharging infrastructure. There have been significant advances: battery costs have dropped by 90%, vehicle range has increased from 100-150 km up to 400+ km, and the recharging infrastructure network is expanding. Nevertheless, BEVs represent only 1.68% of the total passenger cars fleet in the EU, and the recharging infrastructure coverage is still limited in some countries and urban areas^{5, 6}.

This report highlights the main findings of the 2023 EAFO Consumer Monitor survey and presents the results for Denmark. Taking these barriers and developments into account, the key findings of the 2023 EAFO consumer monitor are:

- 41% of the Danish participants are interested in BEVs, 21% are (very) familiar with BEVs, with 31% considering buying a BEV in a time frame of 0-5 years. The most important BEV advantage is that these are better for climate (no tailpipe CO₂ emissions).

¹ https://eur-lex.europa.eu/resource.html?uri=cellar:5e601657-3b06-11eb-b27b-01aa75ed71a1.0001.02/DOC_1&format=PDF

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

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

⁴ <https://www.europarl.europa.eu/topics/en/article/20190313STO31218/co2-emissions-from-cars-facts-and-figures-infographics>

⁵ [Van Mierlo, J., Bercibar, M., El Baghdadi, M., De Cauwer, C., Messagie, M., Coosemans, T., Jacobs, V. A., & Hegazy, O. \(2021\). Beyond the State of the Art of Electric Vehicles: A Fact-Based Paper of the Current and Prospective Electric Vehicle Technologies. *World Electric Vehicle Journal*, 12\(1\), 1-26.](#)

⁶ <https://alternative-fuels-observatory.ec.europa.eu/>

- For European drivers, the BEVs' cost is by far the main disadvantage of driving electric cars. The BEVs' price is also the number one challenge in the twelve surveyed countries. The Danish participants are willing to pay 30,000 € for a BEV, whereas for 23% of the Danish BEV drivers the purchase price, the purchase price was between 20,000 € and 39,999 €. 1% paid less than 10,000 €, 3% paid between 10,000 € and 19,999 €, and 73% paid more than 40,000€. 10% did not know the purchase price.
- BEVs' range is also considered a limitation, even though it is not as important as its price. A minimum desired range between 300 km to 500 km was the choice of 35% of all Danish drivers surveyed. 500 km and more would be the preference of 47%. On the other hand, 2% of the Danish BEV drivers indicated a factory range until 200 km, 23% between 201 km and 400 km, and 75% of more than 401 km. For 88% of the Danish BEV drivers the factory range of their vehicle was usually or always enough.
- 98% of Danish BEV drivers use their vehicles daily or several times a week. Their BEV is mostly new (73%) and privately owned (95%).
- Limited recharging private and public slow options are also considered a disadvantage. To a lesser extent, the survey respondents indicated that having too few public fast recharging points can also be a problem.
- 12% of Danish BEV drivers know what vehicle-to-grid (V2G) is and 60% are interested in buying a V2G-capable vehicle.
- 12% of Danish BEV drivers know what vehicle-to-grid (V2G) is and 60% are interested in buying a V2G-capable vehicle.

The EAFO Consumer Monitor 2023 results also provide further insights concerning the three main barriers identified and the measures that could support non-BEV and BEV drivers:

1. Danish non-BEV drivers are typically characterised as a 55+-year-old, living in a detached house, with a middle income (2,000-3,999 €) and secondary education. Danish BEV drivers are represented by a 55+-year-old male, living in a detached house, with a high income (\geq 6,000 €) and secondary education level.
2. 62% of the surveyed non-BEV Danish drivers would consider buying a BEV in the short, medium, or long term. On the other hand, 18% do not know if they would buy a BEV and 22% would not buy such a vehicle.
3. When both non-BEV and BEV Danish drivers were asked about different governmental incentives to support electric driving, a subsidy to purchase a new BEV was the incentive with the highest perceived impact.

4. For all surveyed Danish drivers, the most relevant information to have a clear opinion about electric driving is to have information about batteries and/or driving range, and the cost comparison with fossil fuel cars.
5. The second-hand and leasing options at an affordable price need to be further considered. 27% of the Danish BEV drivers bought a second-hand BEV, while 4% responded that they lease a car (privately as no business leasing was reported), for which 20% pay less than 500 € per month.
6. When comparing factory range to BEV range satisfaction, 60% of the BEV driver respondents whose vehicle has a factory range between 201 and 300 km indicated that this was usually or always enough. This was also the case for 83% of the respondents whose vehicle has a factory range between 301 and 400 km.
7. Danish BEV drivers responded that the most used location to recharge is a recharging station or wallbox at home (used 78% of the time daily or several times a week). On a daily or weekly basis, public slow and fast recharging points are less often used (42% and 32% respectively).
8. For Danish BEV drivers, the most important criteria of a public recharging session are a fully operational recharging station at arrival and clear and transparent price information, and short or no waiting time to access the recharging point. Convenient on-the-spot payment options and the possibility to do something else while recharging were considered less important.
9. When surveyed Danish BEV drivers were asked about the longest waiting time at a public recharging point, 24% never wait when this is occupied (they leave without recharging), while 26% waited for 15 minutes or less. Still, 41% waited between 15 minutes to 1 hour, and 9% waited for 1 hour or more.
10. Most Danish BEV drivers know which recharging connector or plug is compatible with their car and have a clear overview of the public recharging points in their vicinity.
11. For Danish BEV drivers, the main problem encountered when travelling abroad are expensive and complicated payments for recharging abroad (roaming issue). On the other hand, 74% found their experience when recharging abroad easy or very easy.
12. The most important criteria to eventually buy a V2G compatible BEV are having a similar purchase price as their current BEV car and a pre-determined earnings model. Solar panels are the most common Renewable Energy Device (RED) among BEV drivers.

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

As part of the EAFO consumer section⁷, and for the second year in a row, a survey was launched in October 2023 in twelve EU countries^{8,9} to better understand consumers' intentions to adopt battery electric vehicles (BEVs), their e-mobility and recharging behaviour, and the challenges they perceive or encounter in this sense. The EAFO Consumer Monitor focuses on electric road transport in particular passenger vehicles. It supports policymakers and other key stakeholders by identifying trends, needs and opportunities in the transition towards zero-emission mobility. Detailed information on the survey methodology is available in Annex I.

The EAFO Consumer Monitor survey was performed as follows:

- An online survey was conducted by a closed panel to have a representation of the general population including non-BEV and BEV drivers¹⁰.
- To improve the relevance of the analysis of the BEV drivers alone, an identical online survey was openly disseminated through the EAFO partner AVERE and other external contributors, including FIA members ANWB in the Netherlands and Touring Belgium, the Ministries of Transport from Luxembourg and Lithuania, and the Swedish Energy Agency.

The total number of valid responses is 1,487 respondents, of which 1,354 were filled out by non-BEV drivers and 133 by BEV drivers.

Following Section 1 on key findings and conclusions, Section 2 presents the surveyed Danish participants' attitude, interest, and the information that could support BEV (potential) drivers. Section 3 focuses only on BEV drivers providing an insight into the Danish BEV drivers' e-mobility and recharging

⁷ <https://alternative-fuels-observatory.ec.europa.eu/consumer-portal>

⁸ The twelve countries surveyed were: Belgium, Denmark, France, Germany, Hungary, Italy, Lithuania, Luxembourg, Netherlands, Slovenia, Spain, and Sweden.

⁹ The results for BEV drivers in Lithuania, Luxembourg and Spain are not representative due to the small sample size (29, 38, and 37 BEV drivers respectively). Nevertheless, these are included to indicate trends in BEV driving, mobility behaviour and the recharging infrastructure.

¹⁰ For this report, non-BEV drivers are identified as those driving a vehicle having an internal combustion engine (diesel, petrol, CNG or LPG, hybrid or plug-in hybrid car). BEV drivers refer to those driving a vehicle with no internal combustion engine and with the battery of the electric motor being recharged by the means.

behaviour. Section 4 provides an overview of the results using key indicators for the twelve countries surveyed and the EU aggregated results. Finally, section 5 includes a summary of the 2023 situation in Denmark in terms of passenger BEVs and recharging infrastructure based on the most recent data from EAFO.

[OBJ]

2. Consumer monitoring results: general population views on driving full-electric vehicles

This section presents the results of the merged datasets of the surveyed Danish non-BEV and BEV drivers: 1,487 valid responses from BEV (133) and non-BEV drivers (1,354). It focuses on their attitude, interests and information that could support them to further drive BEV cars.

2.1. Socio-demographics

Based on the survey results, the Danish BEV driver is represented by a 55+-year-old man living in a detached house with a high income and secondary education. There is not a big difference between BEV and non-BEV drivers' representation, although the percentages of younger drivers and households with a lower income and living in an apartment or an attached house are higher among non-BEV drivers.

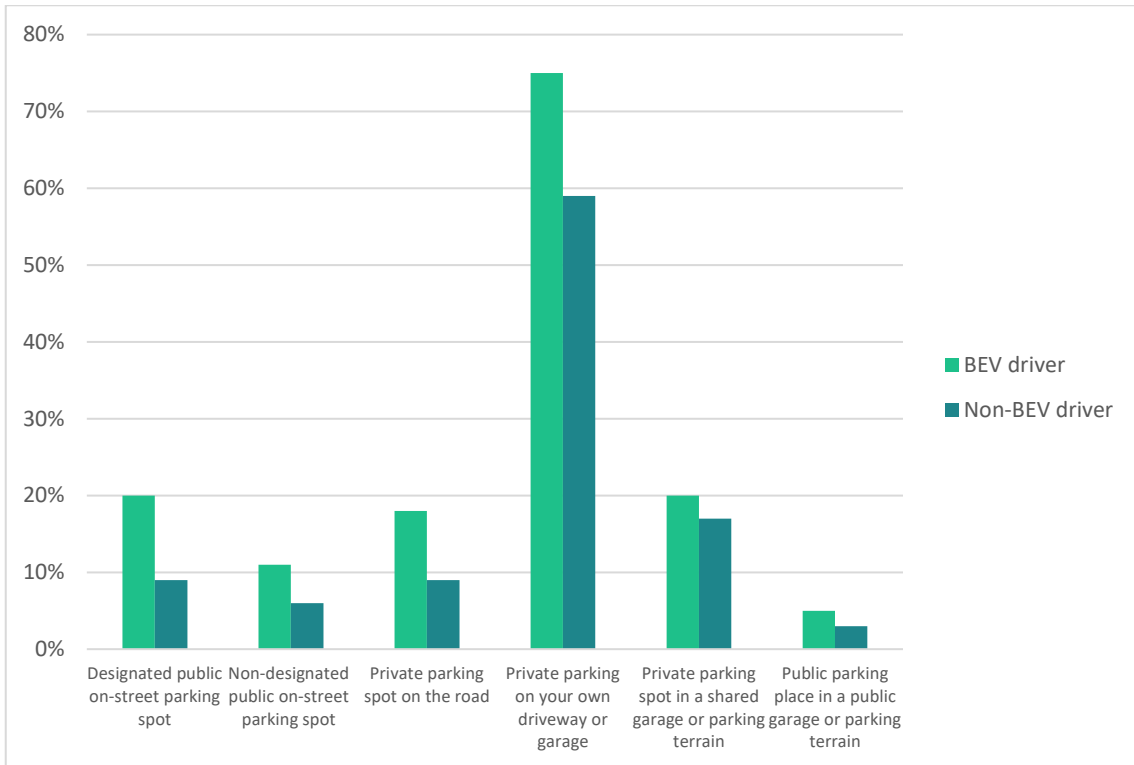
Table 1 – Socio-demographic results from the survey.

		BEV Driver	Non-BEV driver
Gender	Female	45%	49%
	Male	55%	51%
Age	<35	20%	21%
	35-55	38%	26%
	55+	42%	53%
Income	< 800 €	0%	3%
	800-1,999 €	3%	11%
	2,000-3,999 €	13%	32%
	4,000-5,999 €	32%	27%
	≥ 6,000 €	52%	27%
Education	None	0%	1%
	Primary education	4%	8%
	Secondary education	52%	60%
	University or other higher education (e.g., college, polytechnic, academy, etc.)	44%	31%
Housing	Apartment/studio	11%	34%
	Attached house	11%	14%
	Semi-detached house	2%	4%
	Detached house	75%	43%
	Other	1%	5%

Source: EAFO Consumer Monitor and Survey 2023.

Although most BEV drivers surveyed live in a detached house, 11% live in an apartment or studio. Both Danish BEV and non-BEV drivers indicated that they can park at a private parking on their driveway or garage.

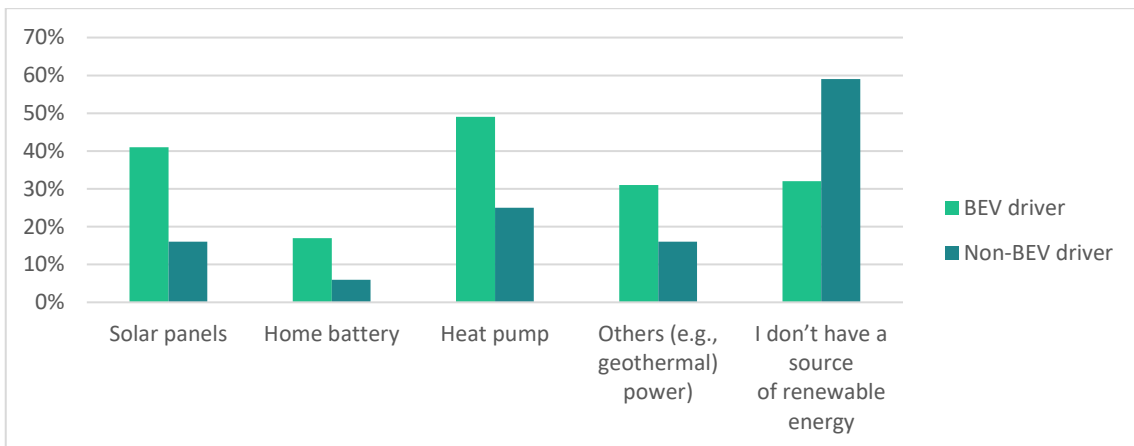
1. Danish drivers identified parking options (multiple answers were possible).



Source: EAFO Consumer Monitor and Survey 2023.

There are also differences between Danish surveyed participants when it comes to Renewable Energy Devices (RED), as more BEV drivers reported having a source of renewable energy.

2. Figure: Danish drivers' Renewable Energy Devices (RED) possession (multiple answers were possible).



Source: EAFO Consumer Monitor and Survey 2023.

2.2. Attitude and motivation towards battery electric vehicles

34% of the respondents in Denmark specified that they are (very) familiar with battery electric driving and 41% are interested in this. The main BEV advantage is that these are considered better for climate (no tailpipe CO₂ emissions).

2. Table: Opinion and views on battery electric vehicles.

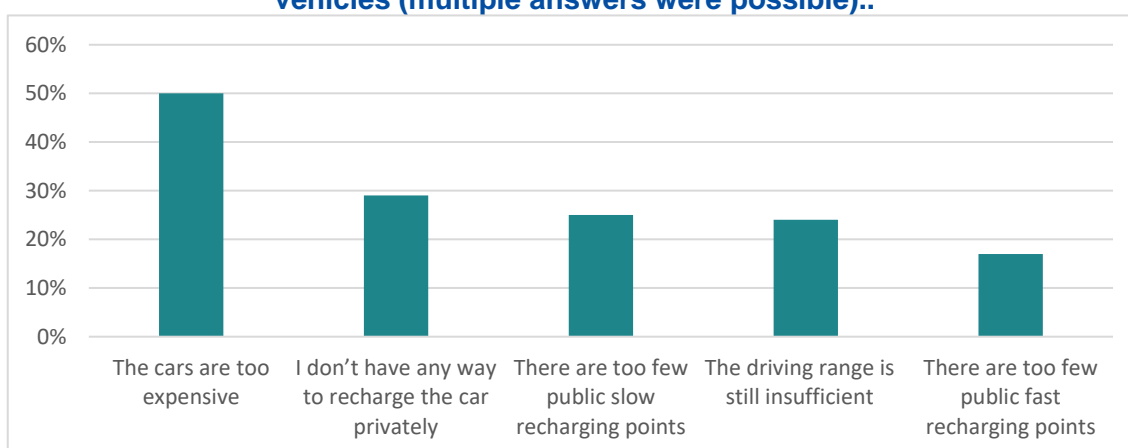
	Results
(Very) familiar with BEV driving (non-BEV drivers)	34%
Interest in BEVs (non-BEV drivers)	41%
Top three advantages BEVs (all surveyed drivers)	Better for climate (no tailpipe CO ₂ emissions), economical to use, better for human health (no tailpipe pollutant emissions)

Source: EAFO Consumer Monitor and Survey 2023.

2.3. Main barriers and opportunities to adopt battery electric vehicles

Danish survey participants were asked to choose the five most relevant disadvantages of driving battery-electric vehicles. As previously reported, these include the price of BEVs, limited recharging options (either private or public), and BEVs' range.

3. Figure: Danish drivers' top 5 identified disadvantages of battery electric vehicles (multiple answers were possible)..

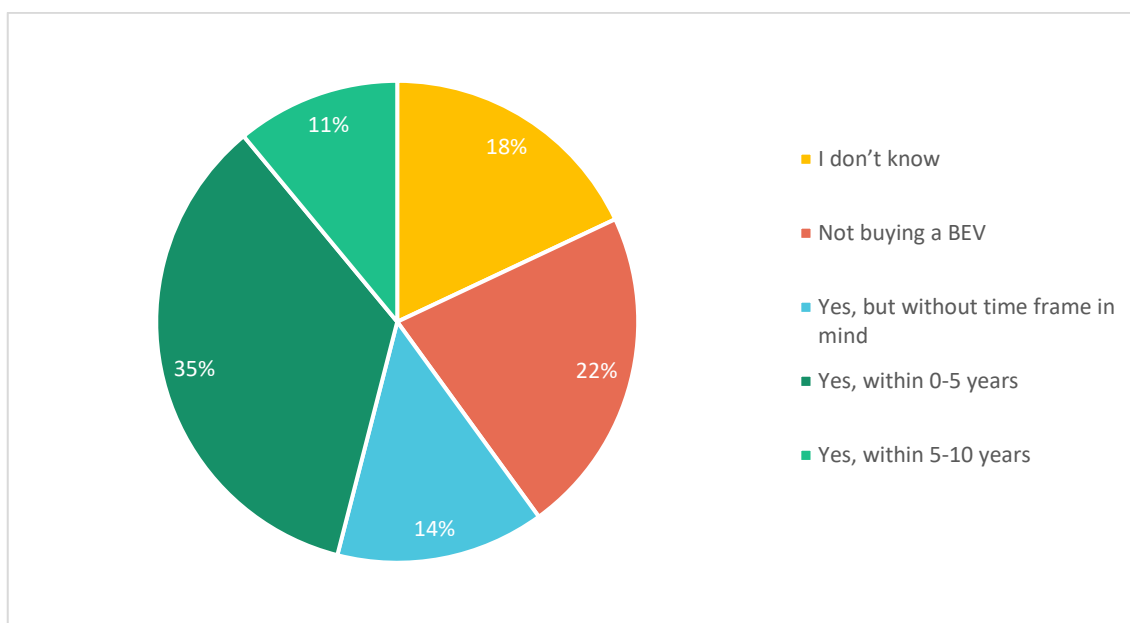


Source: EAFO Consumer Monitor and Survey 2023.

2.4. Time frame to buy a battery electric vehicle

22% of the Danish non-BEV driver respondents do not consider buying a battery electric vehicle. 35% expect to do so in a time frame of 0-5 years.

4. Figure: Danish non-BEV drivers' time frame to buy a battery electric vehicle.



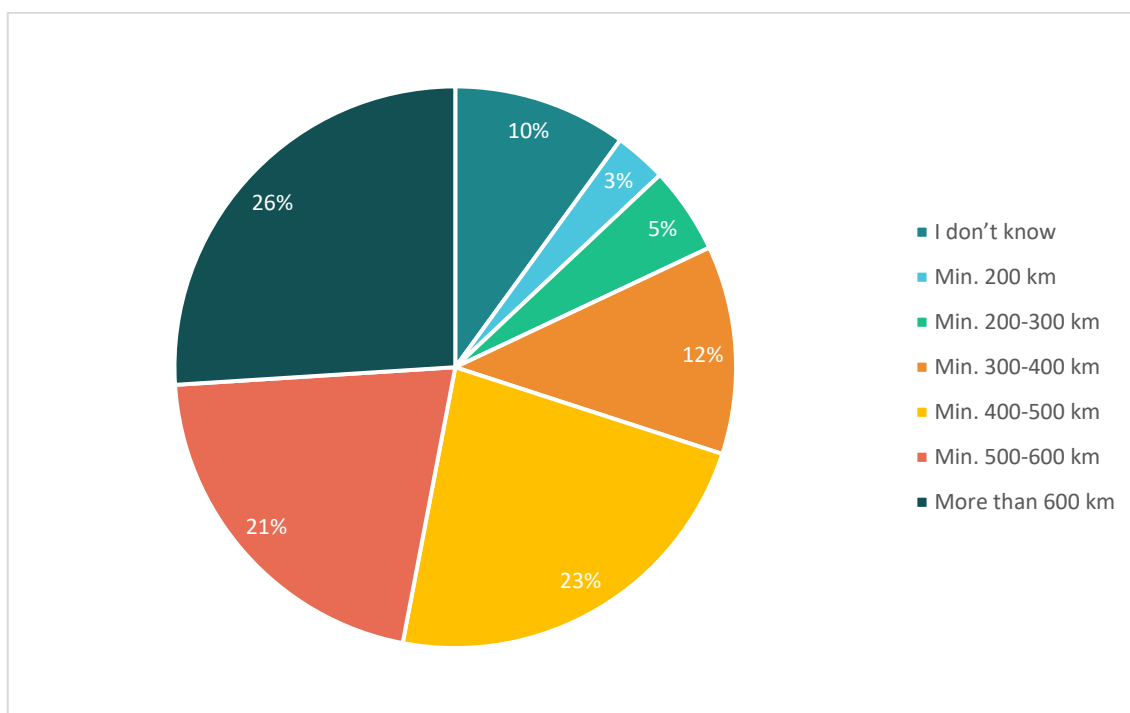
Source: EAFO Consumer Monitor and Survey 2023.

2.5. Willingness to pay and desired range of a battery electric vehicle

The median price that all Danish respondents are willing to pay for a new or used Internal Combustion Engine Vehicle (ICEV) is 26,846€ while for a new or used BEV is 30,000 €.

In the EAFO consumer monitor survey, desired range was described as the number of kilometres that can be driven with a full battery without recharging. A minimum desired range between 300 km to 500 km was the choice of 35% of all Danish drivers surveyed. 500 km and more would be the preference of 47%.

5. Figure: Danish drivers' desired driving range of a battery electric vehicle.



Source: EAFO Consumer Monitor and Survey 2023.

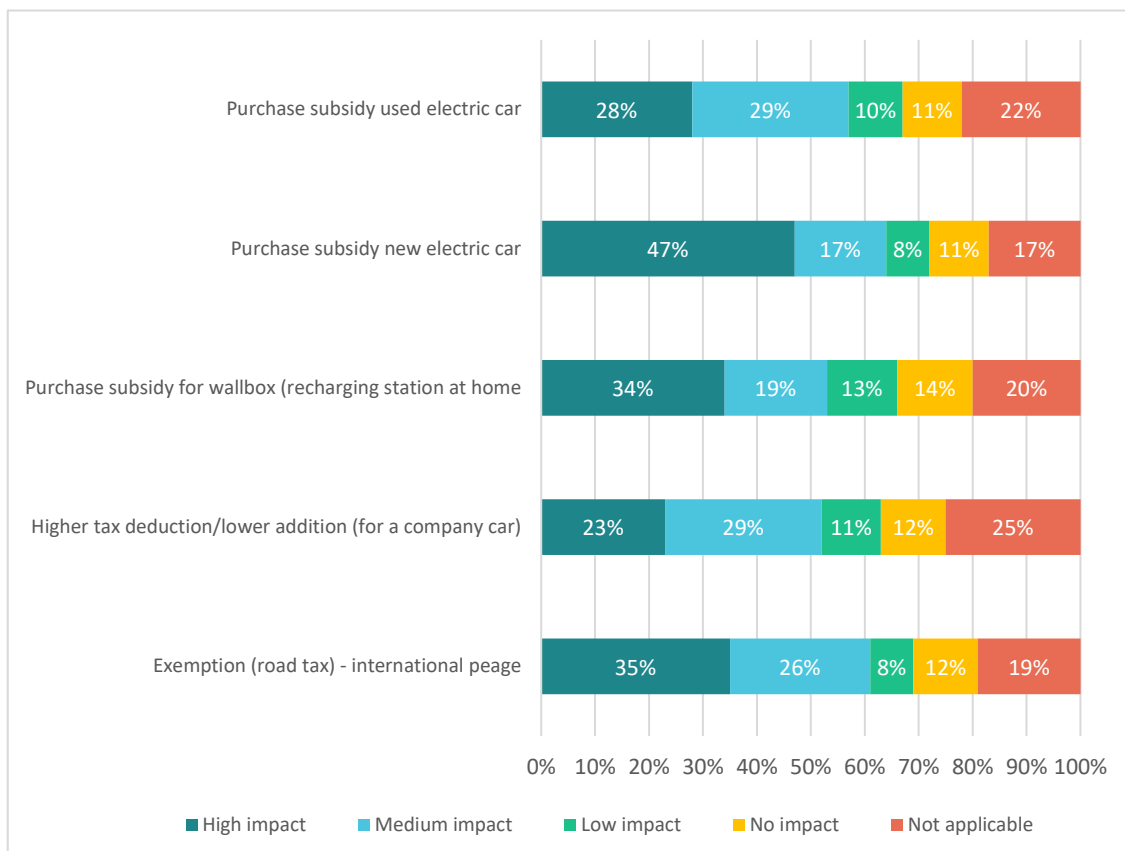
The current BEV market consists of a considerable amount and variety of models (115 individual models, and 286 model variations) with a range between 300 and +600 km (models' variance in March 2024 according to the EAFO). On the other hand, there are only thirteen BEV models available with a purchase price between 20,000 € to 35,000 € (representing 5% of the total BEV models in the market). These have an average range of 217 km (min 135 km, max 300 km), and include mostly cars in the A and B segments (supermini, e.g., city cars), with a couple of models in the C segment (compact, e.g., small family cars).

2.6. Support and governmental incentives to drive a battery electric vehicle

Danish drivers were asked about what they would value the most to have a clearer opinion about electric driving. More information about batteries and/or driving range and cost comparison with fossil fuel cars were the most relevant support measures.

In addition, they also responded about the impact of different governmental incentives on the decision to drive an electric indicated. A subsidy to purchase a new BEV is the incentive having the highest perceived impact.

6. Figure: Perceived impact of governmental incentives on Danish drivers' decision to drive a full-battery electric vehicle.



Source: EAFO Consumer Monitor and Survey 2023.

Denmark offers no direct purchase subsidies for EVs but provides significant tax incentives. BEVs enjoy a full exemption from registration taxes, and PHEVs benefit from reduced rates.

3. Consumer monitoring results: Mobility and recharging behaviour of battery electric drivers

This section focuses on BEV Danish drivers only (133 valid responses in total). The results of the EAFO 2023 survey give an insight into the mobility behaviour of Danish BEV drivers. Results on recharging behaviour are also presented.

3.1. Mobility behaviour and vehicle ownership

98% of the BEV Danish drivers surveyed use their vehicle several times a week or daily. Most BEVs (when it is the main household vehicle) are new privately owned cars. Most Danish BEV drivers have less than one to 3 years of experience as a BEV driver.

3. Table: Mobility behaviour and vehicle ownership.

	Results
< 1 year to 3 years as BEV driver	67%
3 years to 5 years or longer as BEV driver	33%
Timeframe BEV driver unknown	1%
km driven per year (median)	15,000
km driven per day (median)	100
BEV drivers using their vehicle daily to several times a week	98%
Main activity when driving their BEV	For shopping/errands (e.g., bringing and picking up the children, doctor visits, administration)
BEV ownership (BEV as main car)	
Leased BEV (business)	0%
Leased BEV (private)	4%
BEV company car (if employee)	1%
Privately owned BEV	95%
New vs. second-hand BEVs (BEV as main car)	
New BEV	73%

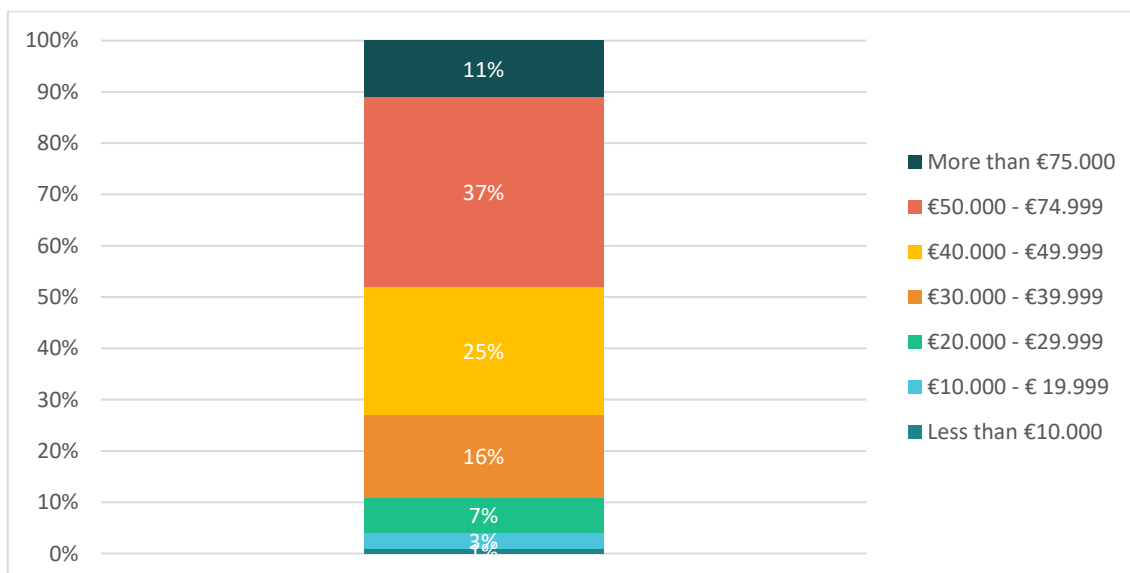
	Results
Second-hand BEV	27%

Source: EAFO Consumer Monitor and Survey 2023.

3.2. Purchase and lease price paid by BEV drivers

BEV Danish drivers surveyed indicated the purchase price paid when their BEV is the main vehicle. For 41% this was between 20,000 € and 39,999 €. 1% paid less than 10,000, 4% paid between 10,000 € and 20,000€ and 73% paid more than 40,000€.

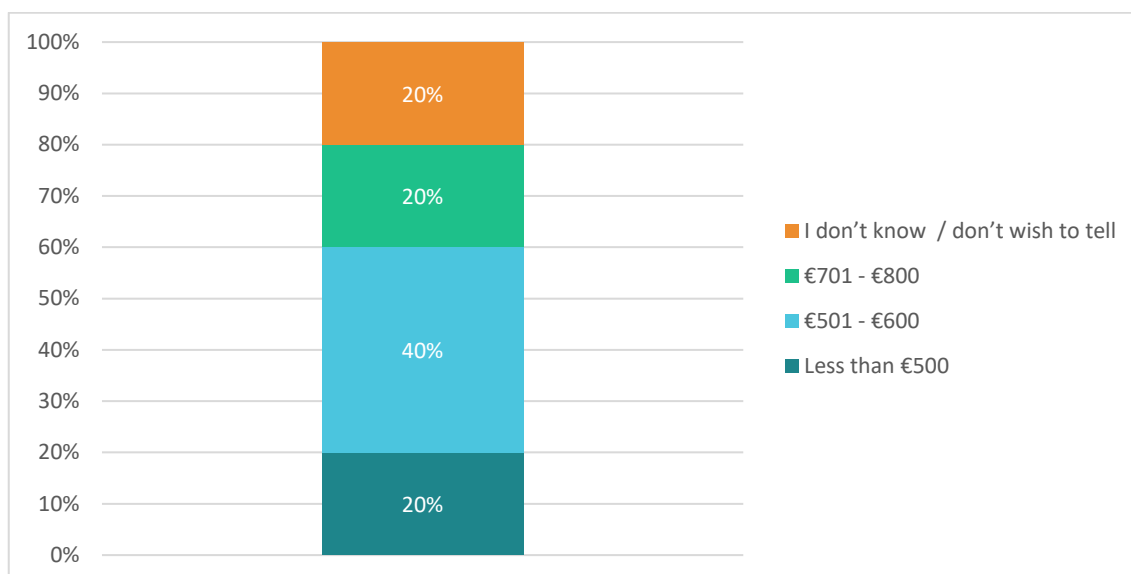
7. Figure: Danish BEV drivers' purchase price for their battery electric vehicle.



Source: EAFO Consumer Monitor and Survey 2023.

On the other hand, 4% of the Danish BEV driver participants responded that their first car was leased (privately or for business purposes). 20% pay less than 500 € per month, while 60% pay more than 501 €.

8. Figure: Danish BEV drivers' lease price for their battery electric vehicle.

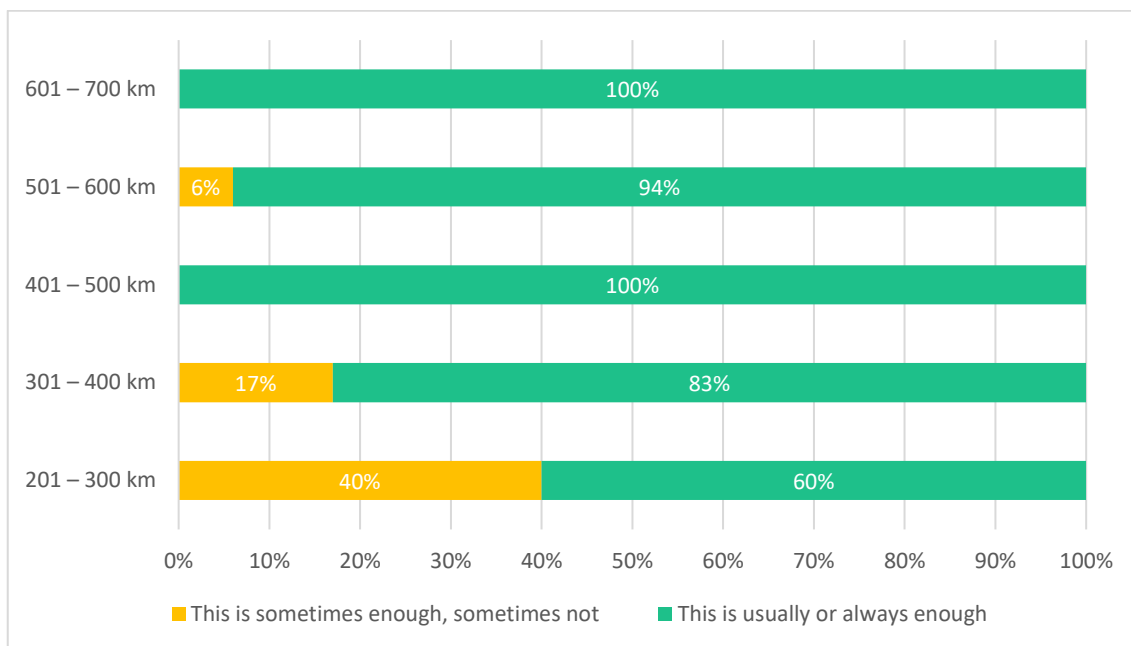


Source: EAFO Consumer Monitor and Survey 2023.

3.3. Factory range and range satisfaction of full-electric cars used by BEV drivers

Factory range refers to the kilometres a new BEV can drive with the available vehicle battery after running a World Harmonised Light Vehicle Test Procedure (WLTP) test cycle. 2% of the Danish BEV drivers indicated a factory range until 200 km, 23% between 201 km and 400 km, and 75% of more than 401 km. The factory range of the first car was usually or always enough for 88% of the surveyed Danish BEV drivers. When comparing factory range to BEV range satisfaction, 60% of the BEV driver respondents stated that a factory range between 201 and 300 was usually or always enough. This was also the case for 83% of the respondents of a car with a factory range between 301 and 400 km.

9. Figure: Factory range and range satisfaction according to Danish BEV drivers.

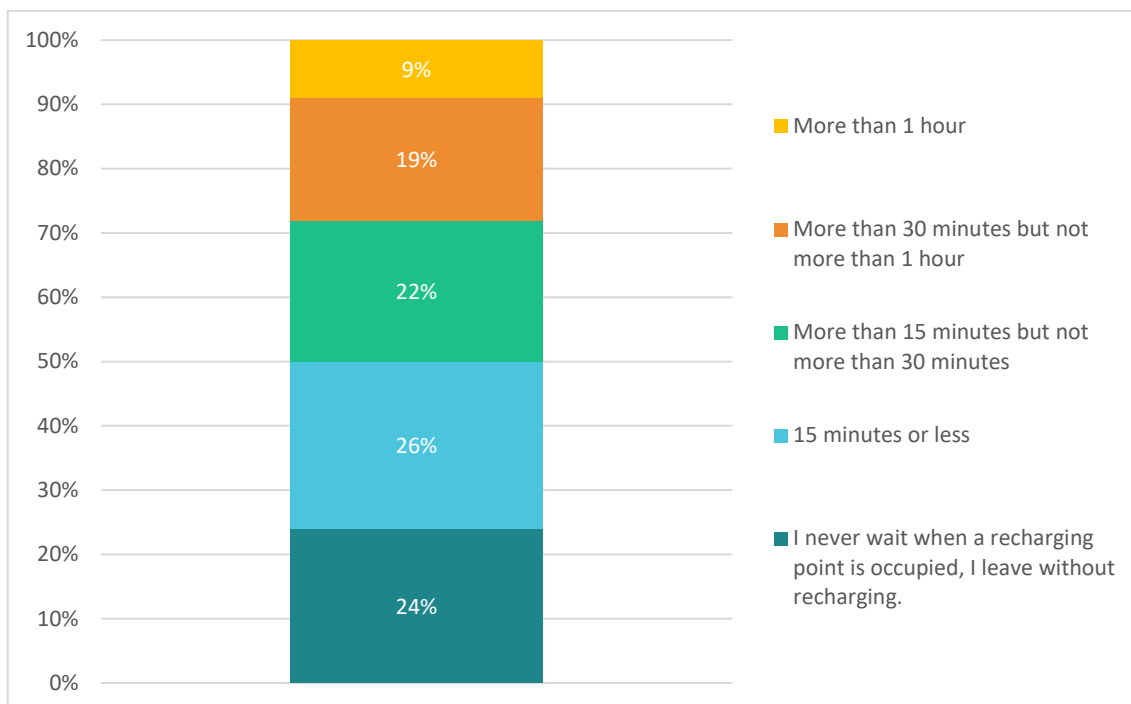


Source: EAFO Consumer Monitor and Survey 2023.

3.4. BEV drivers recharging according to battery level and waiting time at public recharging points

Surveyed BEV Danish drivers were asked what the longest waiting time was to use a public recharging point. 24% never wait when this is occupied (they leave without recharging), while 26% waited for 15 minutes or less. Still, 41% waited between 15 minutes to 1 hour. Furthermore, 47% responded that they recharge their BEV when the battery level reaches a certain threshold.

10. Figure: Danish drivers' waiting times when using a public recharging point.

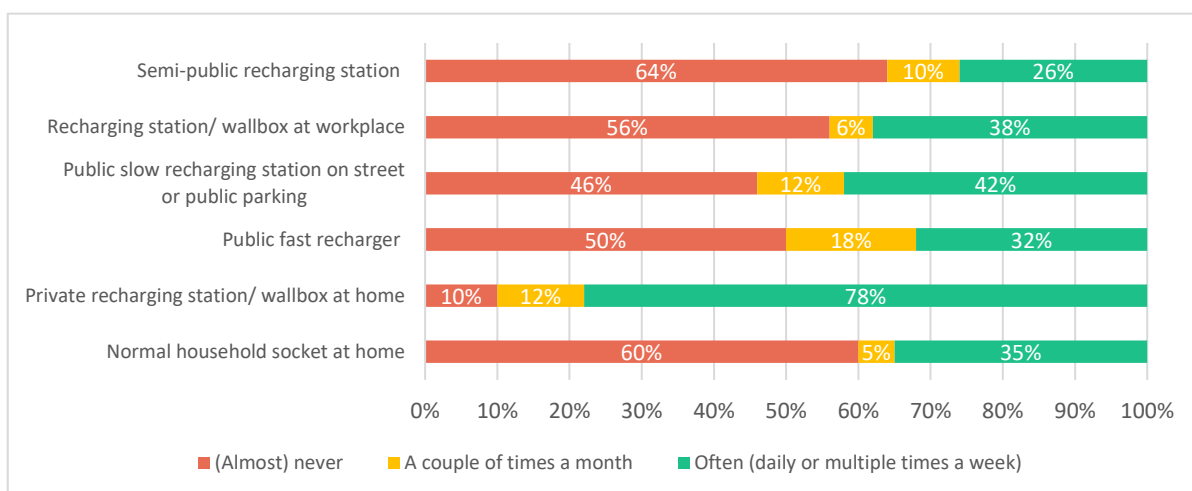


Source: EAFO Consumer Monitor and Survey 2023.

3.5. Recharging location and frequency of use by BEV drivers

For BEV Danish drivers a private recharging station or wallbox at home is the most frequently used location. Public slow recharging stations on the street or public parking and public fast recharging stations are not that often used (42% and 32% respectively).

11. Figure: Recharging location and frequency use by Danish BEV drivers.

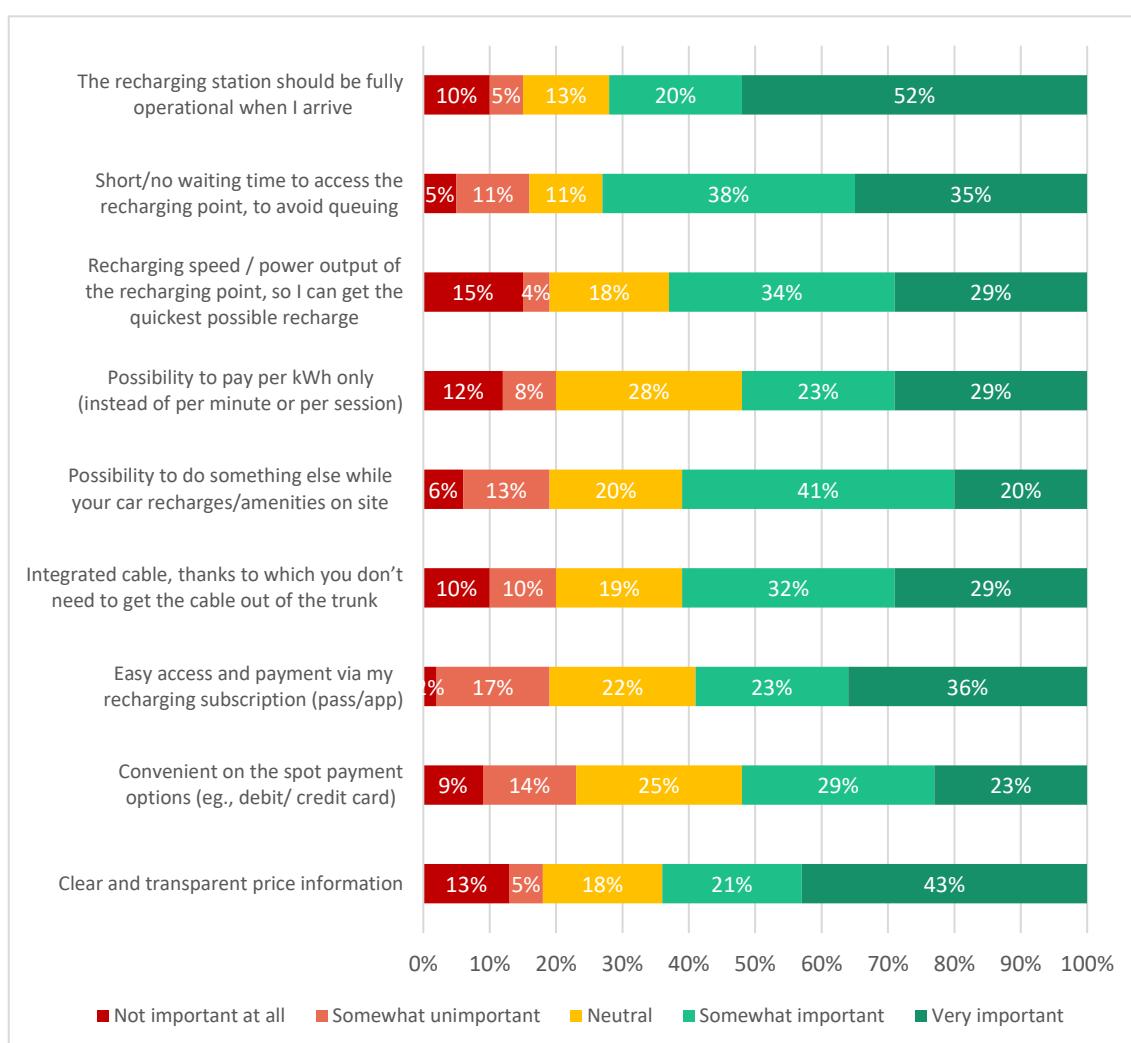


Source: EAFO Consumer Monitor and Survey 2023.

3.6. Important characteristics of a public recharging session for BEV drivers

Danish BEV driver respondents were asked to indicate the most important characteristics of a public recharging session. A fully operational recharging station when arriving, clear and transparent price information, and short or no waiting time to access the recharging point. Convenient on-the-spot payment options and the possibility to do something else while recharging were considered less important.

12. Figure: Important characteristics for Danish BEV drivers of a public recharging session.

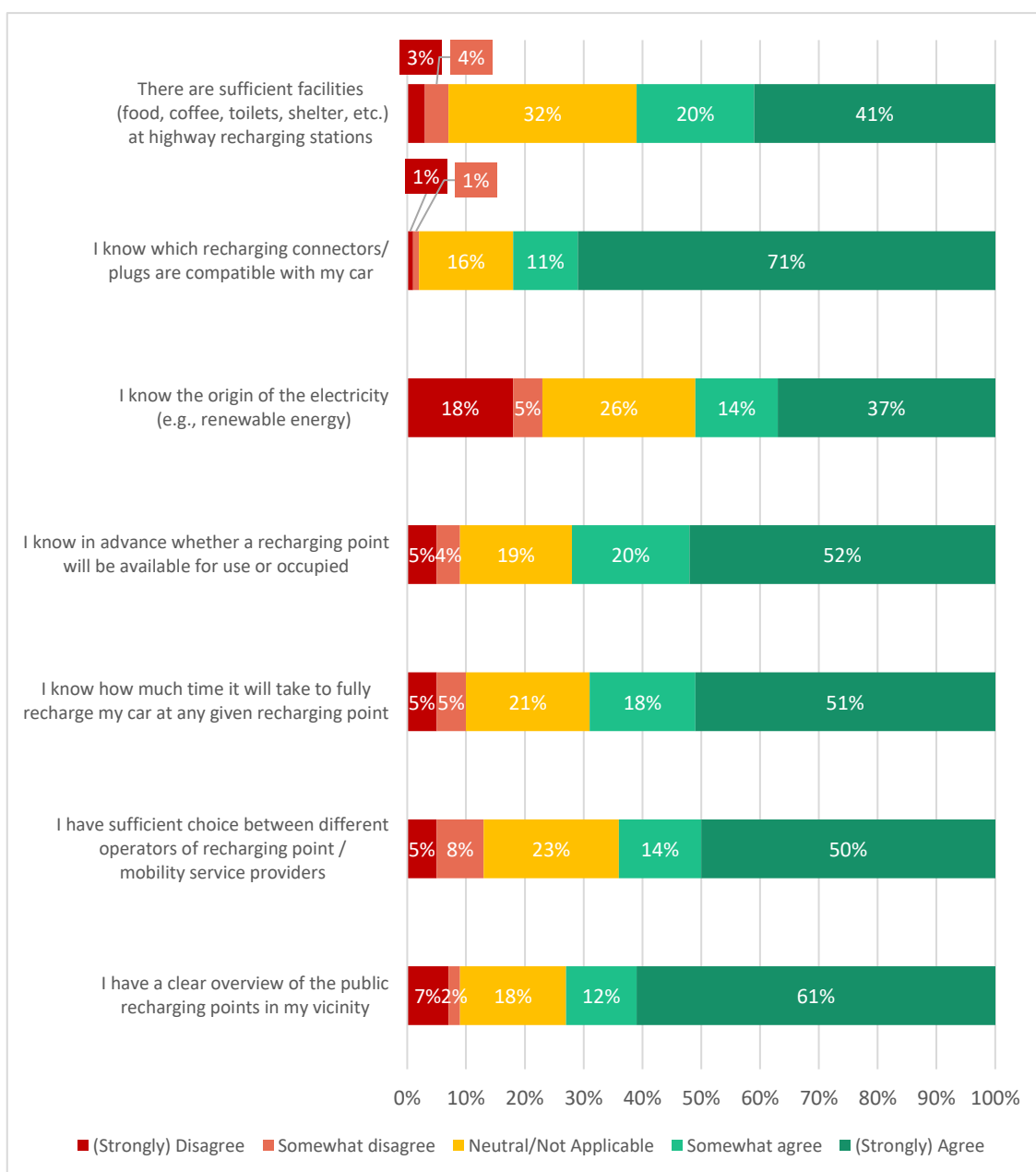


Source: EAFO Consumer Monitor and Survey 2023.

3.7. BEV drivers' opinion and payment options at public recharging points

Most Danish BEV drivers know which recharging connector or plug is compatible with their car, have a clear overview of the recharging points in their vicinity, and know how much time it will take to fully recharge their vehicle. On the other hand, they mostly do not know the origin of the electricity at public recharging points.

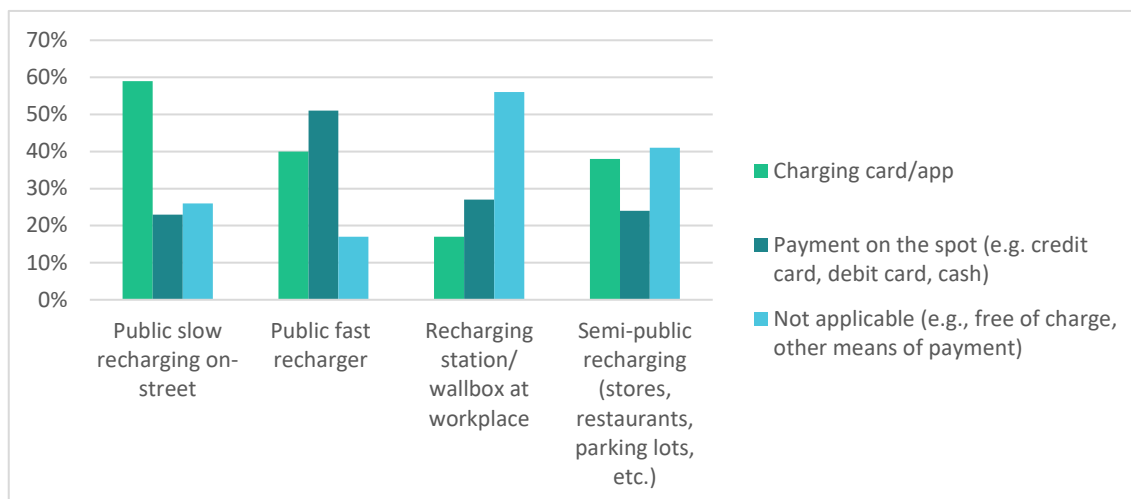
13. Figure: Public recharging points opinions of Danish BEV drivers.



Source: EAFO Consumer Monitor and Survey 2023.

In all public slow and semi-public recharging stations, a charging card or app is the most used payment option. A payment on the spot (e.g., with a credit card) is used the most at public fast rechargers.

14. Figure: Payment options used at recharging station by Danish BEV drivers.

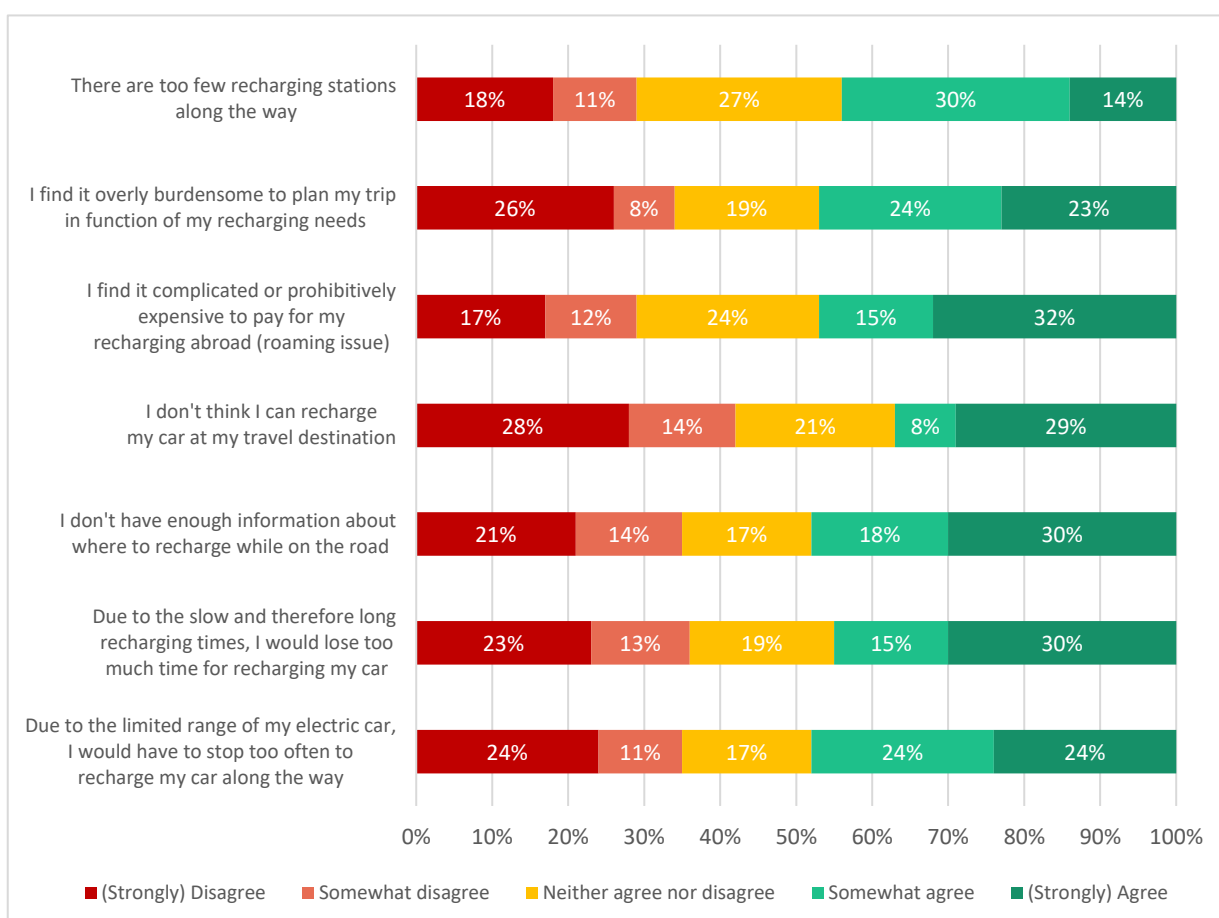


Source: EAFO Consumer Monitor and Survey 2023.

3.8. Main problems encountered by BEV drivers when travelling abroad

23% of the Danish BEV drivers stated that they have travelled multiple times abroad with their BEV, 38% have travelled once, and 39% have never used their BEV to travel abroad. When they were asked to indicate the main problems encountered when travelling abroad complicated or expensive payments for recharging abroad (roaming issue) was the main issue identified.

15. Figure: Danish drivers' opinions regarding travelling abroad with a BEV.



Source: EAFO Consumer Monitor and Survey 2023.

Nevertheless, when looking at their recharging experience when travelling abroad, 74% indicated that it was (very) easy, while only 5% considered as difficult.

4. Table: BEV drivers experience when recharging abroad.

	Results
Very easy	51%
Easy	23%
Not easy, but not difficult either	12%
Difficult	5%
Very difficult	0%
Not applicable (did not recharge my car abroad)	9%

Source: EAFO Consumer Monitor and Survey 2023.

3.9. Future trends: BEV drivers' awareness and interest in vehicle-to-grid capable vehicles

Vehicle-to-grid (V2G) refers to the interaction between Electric Vehicles and the power grid. The basic idea of V2G is to use EV batteries as intermediate storage facilities for providing services to the electric power system when BEVs are parked. For example, giving energy back to the grid when the car is not in use. Danish BEV drivers were asked if they were aware of this technology. 59% had never heard of it, while 12% indicated being aware and having knowledge about this.

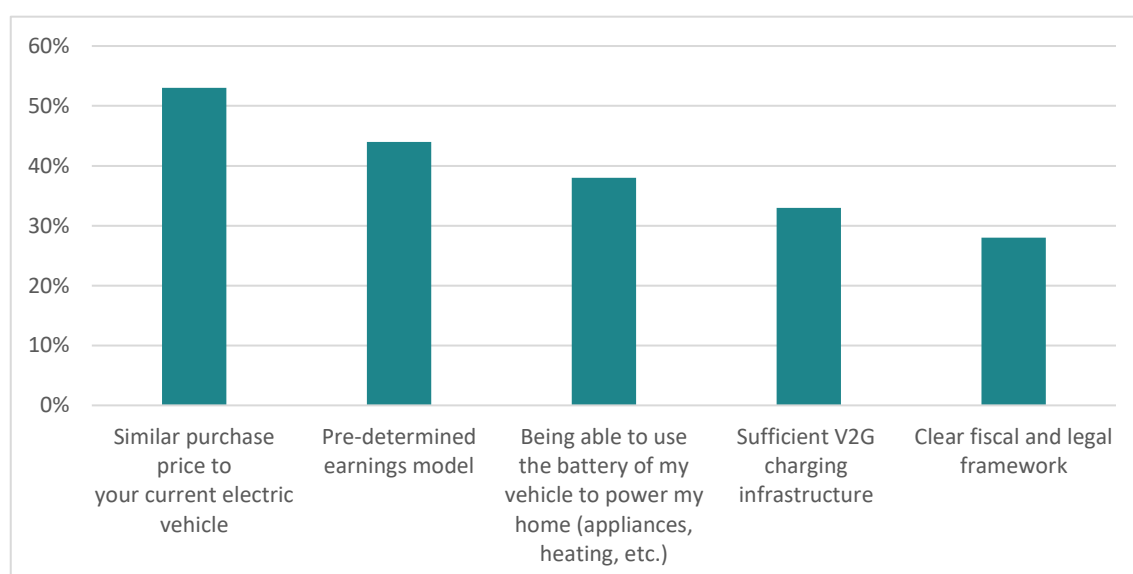
5. Table: BEV drivers V2G awareness


BEV driver V2G awareness	Results
No, never heard of it	59%
Yes, heard of it, but know nothing/just a little bit about it	29%
Yes, heard of it and know quite a bit/a lot about it	12%

Source: EAFO Consumer Monitor and Survey 2023.

Moreover, 60% of Danish BEV drivers indicated that they are interested in buying a vehicle car with the V2G functionality. The most important criteria to eventually buy such a vehicle are having a similar purchase price as their current BEV car and a pre-determined earnings model (knowing beforehand and in detail how you could financially benefit from transferring energy from the battery of your vehicle to the electricity grid).

16. Figure: Danish BEV drivers' willingness to buy a V2G-capable BEV (multiple answers were possible).



Source: EAFO Consumer Monitor and Survey 2023. 

4. Surveyed countries and EU aggregated results & incentives overview¹¹

The number one BEV driving disadvantage identified in all cases is the purchase price of the vehicle.

The proportion of BEVs as privately owned cars is the highest in Denmark. Danish BEV drivers are using the most public slow and fast recharging infrastructure on a daily or weekly basis. Moreover, for BEV drivers in Denmark, a fully operational recharging station at arrival was the most important characteristic of a public recharging session.

¹¹ The results for BEV drivers in Lithuania, Luxembourg and Spain are not representative due to the small sample size (29, 38, and 37 BEV drivers respectively). Nevertheless, these are included to indicate trends in BEV driving, mobility behaviour and the recharging infrastructure.

6. Table: Barriers and opportunities BEV driving

Country	Main disadvantage	% BEV potential drivers (time frame considering buying a BEV)	High impact government incentive to drive BEV	Existing financial incentive (end 2023) 9
Belgium	BEVs are too expensive	44%	Subsidy buying a new EV	Flanders to offer 5,000 € EV grants in 2024 (no subsidies in 2023), reduced annually till 2027. Zero-emission vehicles get tax exemptions, with BEVs 100% company tax deductible till 2026. BIK (benefit-in-kind) rates are CO ₂ -based, and Brussels offers LEZ replacement subsidies for commercial vehicles and plans to ban diesel by 2030.
Denmark		62%		Denmark offers no direct purchase subsidies for EVs but provides significant tax incentives (more than 10k € in contrast to ICE cars). BEVs enjoy a full exemption from registration taxes, and PHEVs benefit from reduced rates. The country supports public and private EV recharging infrastructure through financial subsidies, tax exemptions, and mandatory installation regulations in new buildings.
France		46%		France offers up to 7,000 € ecological bonus for EVs and 6,000 € for trade-ins, with tax benefits like 50% registration fee exemption for EVs and BIK (benefit-in-kind) reductions for company EVs until December 2024.
Germany		55%		Germany ended its EV subsidies in December 2023, with manufacturer discounts until Mar 2024. Tax benefits for EV company cars continue, and EVs remain exempt from the annual circulation tax until 2025. The focus has shifted to vehicles with proven climate benefits, with a 130 € billion investments in sustainable mobility.
Hungary		67%		Hungary offers a 79 € million subsidies for company BEVs from February 2024 (no subsidy in 2023), with grants up to 10,500 € based on vehicle price and battery capacity. Green plate vehicles enjoy numerous tax exemptions including registration, vehicle, and transfer taxes. Additional benefits include corporate tax credits for energy efficiency, deductible costs for electric charging stations, and free municipal parking for green plate vehicles.
Italy		65%		Current incentives go up to a maximum of 5,000 € with respect to emission class and if you scrap an old polluting car. New incentives (from mid-2024) will go up to a maximum of 13,750 € with respect to income (<30k €) and for BEVs: however, incentives are active, even if lower, for other emission classes, including ICE. Benefits include a five-year tax exemption, reduced VAT for people with disabilities, and incentives for charging installation. Lombardy provides regional subsidies, enhancing support for a cleaner vehicle transition.
Lithuania		55%		Subsidy buying a used EV

Country	Main disadvantage	% BEV potential drivers (time frame considering buying a BEV)	High impact government incentive to drive BEV	Existing financial incentive (end 2023) 9
Luxembourg		51%	Subsidy buying a new EV	Purchase subsidy of 8,000 € for new BEVs and FCEVs (Fuel Cell Electric Vehicle) with less than 7 seats and under 18 kWh/100 km consumption; 3,000 € if above this threshold. Up to 1,000 € for electric motorcycles and quadricycles, covering up to 50% of the cost, extended until March 2024. The government halved administrative tax for BEVs, and applied CO ₂ -based tax incentives, aiming for 49% new EVs by 2030.
Netherlands		52%	Road tax exemptions	Dutch EV incentives include purchase subsidies (2,950 € new, 2,000 € used), and tax exemptions until 2024 on BPM (Belasting van personenauto's en motorrijwielen or tax on private motor vehicle and motorcycle charged once for each car registered) and MRB (Motorrijtuigenbelasting, a vehicle tax based on fuel, emissions and weight, paid monthly or quarterly from the date of car registration on the name of the owner). Entrepreneurs enjoy additional tax benefits, although the MIA/Vamil scheme is being phased out. Energy tax for recharging stations is reduced, indirectly lowering costs.
Slovenia		43%	Subsidy buying a new EV	Slovenia offers up to 6,500 € subsidy for new EVs under 35,000 € retail price, for individuals, and various subsidies for legal entities on new EVs up to 65,000 € retail price. Zero benefit-in-kind for company cars, VAT deductions on EV purchases up to 80,000 €, and subsidized Eco Fund loans promote EV adoption.
Spain		70%		Spain's MOVES programs offer significant EV subsidies, with up to 7,000 € for new BEVs under conditions like vehicle scrappage. MOVES III extends till July 2024 with a 400-800 € million budgets. Incentives include major tax reductions, VAT exemptions, and enhanced recharging point installation aids, promoting broader EV adoption across the nation. These benefits are complemented by local exemptions from road taxes and special privileges like toll and parking exemptions for electric vehicles.
Sweden		62%		No purchase subsidies for personal EVs post-November 2022, but a new 'climate premium' for light electric trucks from February 2024 (30% of cost difference, capped at 4,300 €. Ongoing support includes minimal road tax (SEK 360 or 31 €), tax benefits for electric company cars, and funding for electric vehicle supply equipment projects.
EU 12 countries		57%		Financial support through grants and loans.

7. Table: BEV cars' ownership model & new/second-hand market

Ownership model & new/used BEV	Belgium	Denmark	France	Germany	Hungary	Italy	Luxembourg	Lithuania	Netherlands	Slovenia	Spain	Sweden	EU-12 countries
Leased BEV (business)	7%	0%	2%	5%	13%	4%	0%	0%	4%	1%	0%	6%	4%
Leased BEV (private)	5%	4%	31%	22%	6%	10%	16%	7%	14%	15%	14%	25%	16%
BEV company car (if employee)	39%	1%	5%	12%	11%	2%	6%	7%	16%	13%	3%	16%	11%
Privately owned BEV	49%	95%	62%	61%	70%	84%	78%	86%	66%	71%	83%	53%	69%
New BEV	79%	73%	77%	86%	51%	89%	84%	26%	76%	75%	92%	67%	74%
Second-hand BEV	21%	27%	23%	14%	49%	11%	16%	74%	24%	25%	8%	33%	26%

8. Table: Recharging behaviour of BEV drivers

Country	Waiting time 15 min or less	BEV drivers recharging considering battery level	% time using slow public recharging point daily/per week	% time using fast public recharging point daily/per week	Most important characteristic public recharging session	Most used payment option at slow recharging points	Most used payment option fast public recharging points	
Belgium	31%	46%	23%	16%	Short or no waiting time to access a recharging point	Charging card or app	Charging card or app	
Denmark	26%	47%	42%	32%	Fully operational recharging station at arrival		Payment on the spot	
France	42%	44%	15%	8%	Clear and transparent price information		Charging card or app	Charging card or app
Germany	26%	64%	12%	7%	Fully operational recharging station at arrival			
Hungary	28%	67%	9%	6%	Fully operational recharging station at arrival			
Italy	15%	51%	33%	18%	Fully operational recharging station at arrival			
Lithuania	10%	45%	17%	10%	Fully operational recharging station at arrival			
Luxembourg	24%	42%	11%	8%	Fully operational recharging station at arrival			

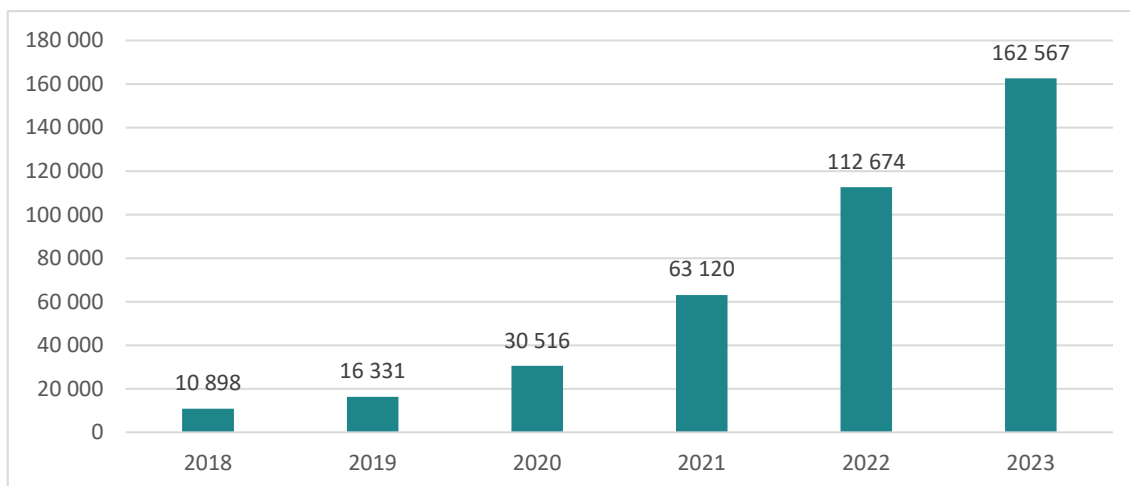
Country	Waiting time 15 min or less	BEV drivers recharging considering battery level	% time using slow public recharging point daily/per week	% time using fast public recharging point daily/per week	Most important characteristic public recharging session	Most used payment option at slow recharging points	Most used payment option fast public recharging points
Netherlands	38%	54%	20%	8%	Short or no waiting time to access a recharging point		
Slovenia	31%	52%	11%	5%	Fully operational recharging station at arrival		
Spain	16%	70%	57%	46%	<i>Short or no waiting time to access a recharging point</i>		
Sweden	40%	38%	15%	9%	Fully operational recharging station at arrival		
EU 12 countries	32%	51%	18%	10%	Fully operational recharging station at arrival		

5. BEVs and recharging infrastructure in Denmark

The Danish government has implemented different incentives, including tax benefits, VAT exemptions and subsidies to support the uptake of electric vehicles and recharging infrastructure (an overview of these can be found in [EAFO incentives & legislation Denmark](#)).

In Denmark, while direct purchase subsidies for EVs are currently unavailable, substantial tax incentives are offered. BEVs are exempt from registration taxes, whereas PHEVs incur significantly reduced taxes compared to ICE vehicles. The tax structure for BEVs includes a diminishing battery deduction, phasing out by 2025, and a tiered tax calculation that progressively increases based on vehicle price. For company cars, BEVs and PHEVs enjoy reduced taxable values and environmental taxes. The Danish government has facilitated the installation of public recharging stations with a dedicated budget and extended tax exemptions for commercial electricity used in these stations until 2030. Additional support includes subsidies for recharge point installation at housing associations and discounted electricity rates for electric buses. Regulatory measures also mandate the installation of recharging stations in new or renovated buildings with parking facilities.

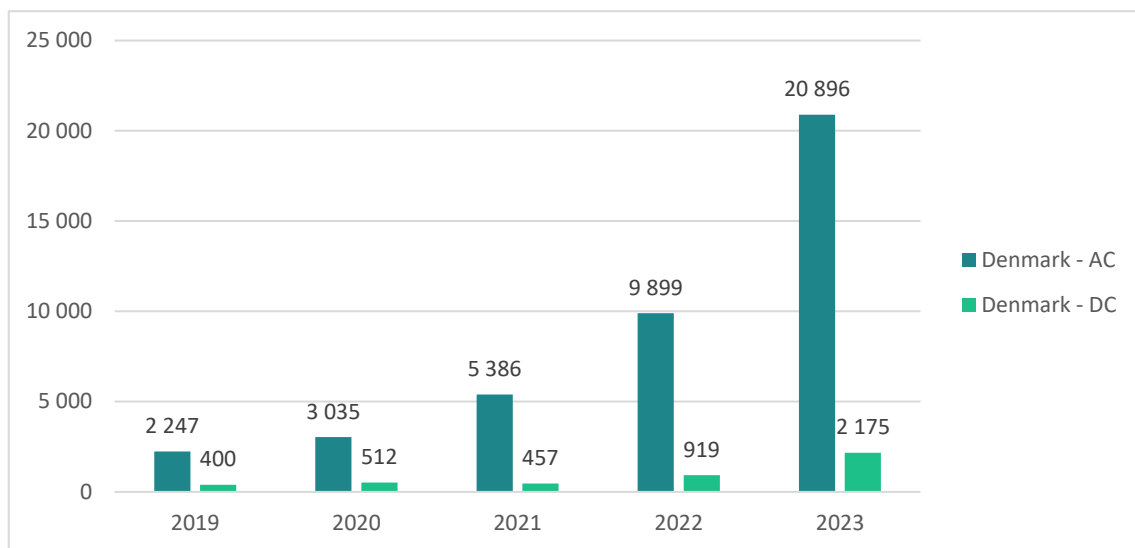
17. Figure: Evolution of the total BEV passenger vehicles in Denmark.



Source: EAFO portal.

For the year 2023, there were 162,567 BEVs, representing 5.68% of the total passenger vehicles fleet in Denmark.

18. Figure: Evolution of alternating and direct current (AC or slow and DC or fast) recharging points in Denmark.



Source: EAFO portal.

Moreover, the public recharging infrastructure network has considerably grown in the last few years. According to the EAFO portal, by the end of 2023, there were 20,896 (AC) slow public recharging points, and 2,175 (DC) fast public ones.

6. Annex I: Consumer monitoring methodology & approach

For the 2023 launch of the EAFO consumer monitor survey, twelve countries¹² were selected. The survey was conducted using a panel on the general population of each of the surveyed countries. To improve the analysis of BEV drivers, a purposeful sample was collected through AVERE and external contributors, including FIA members ANWB in the Netherlands, Touring Belgium, the Ministries of Transport from Luxembourg and Lithuania, and the Swedish Energy Agency. The same survey was used for both the panel and the BEV sample.

The survey campaign was launched at the end of October 2023. For the panel Denmark, the aim was to reach 2,000 responses. The survey was open for one month. As BEV drivers are difficult to reach, their survey campaign was closed at the beginning of February 2024 in all surveyed countries.

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 such a 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 Internal Combustion Engine Vehicle) 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 mid-February 2024. To improve the relevance of the analysis of the BEV drivers alone, the survey conducted on BEV drivers (from AVERE and other external contributors) was combined with the survey conducted on the general population. The respondents were considered BEV drivers when their first, second or third car was a BEV. A total of 1,487 responses were considered valid for both the panel and the AVERE and external contributors' datasets. Out of these, there were 1,354 non-BEV and 133 BEV drivers.

¹² The twelve countries surveyed were: Belgium, Denmark, France, Germany, Hungary, Italy, Lithuania, Luxembourg, Netherlands, Slovenia, Spain, and Sweden.

The validated and combined datasets of all surveyed countries were used for a EU aggregated report.

