



European
Commission

Consumer Monitor 2023

EUROPEAN ALTERNATIVE FUELS OBSERVATORY



COUNTRY REPORT
SPAIN

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June - 2024

EUROPEAN COMMISSION

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

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Consumer Monitor 2023

Country Report: Spain

Manuscript completed in June 2024

First edition

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Luxembourg: Publications Office of the European Union, 2024

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

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1. The 2023 Spanish 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 Spain. Taking these barriers and developments into account, the key findings of the 2023 EAFO consumer monitor are:

- 34% of the Spanish participants are interested in BEVs, 49% are (very) familiar with these. 44% consider buying a BEV in a time frame of 0-5 years. The most important BEV advantage is that they are considered better for the 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 Spanish 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 Spanish participants are willing to pay 20,000 € (median value) for a BEV (used or new), whereas for 38% of the Spanish BEV drivers, the purchase price paid was between 20,000 € and 39,999 €. 4% paid less than 10,000 €, 8% between 10,000 € and 19,999 €, 50% paid 40,000 € or more, and 4% did not know or did not want to indicate 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 31% of all non-BEV Spanish drivers surveyed. 500 km and more would be the preference of 48%. On the other hand, 3% of the Spanish drivers indicated a factory range until 200 km, 41% between 201 km and 400 km, and 52% of more than 401 km. For 90% of the Spanish BEV drivers stated that the factory range of their vehicle was usually or always enough.
- 95% of Spanish BEV drivers use their vehicles daily or several times a week. Their BEV is mostly new (92%) and privately owned (83%).
- Limited recharging private options are also considered a disadvantage. To a lesser extent, survey respondents indicated that having too few public fast recharging points can also be a problem.
- 11% of Spanish BEV drivers know what vehicle-to-grid (V2G) is and 68% 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. Spanish non-BEV drivers are typically characterised as a 35 to 55-year-old, living in an apartment, with a middle income (2,000-3,999 €) and secondary education level. On the other hand, a -35 to 55-year-old male, living in an apartment, with a high income (4,000-5,999 €) and a high education level represents BEV drivers.
2. 70% of the surveyed non-BEV Spanish drivers would consider buying a BEV in the short, medium, or long term. In contrast, 16% do not know if they would buy a BEV and 14% would not buy such a vehicle.
3. When both non-BEV and BEV Spanish 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 Spanish drivers, the most relevant information to have a clear opinion about electric driving is to have information

about batteries and/or driving range, the cost comparison with fossil fuel cars and a test drive.

5. The second-hand and leasing options at an affordable price need to be further considered. 8% of the Spanish BEV drivers bought a second-hand BEV, while 14% responded that they privately lease a car, for which 50% pay less than 500 € per month.
6. Spanish 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 (38% and 30% respectively).
7. For Spanish BEV drivers, important characteristics of a public recharging session are short or no waiting time to access a recharging point, a fully operational recharging station when arriving, and clear and transparent price information. Convenient on-the-spot payment options and an integrated cable were considered less important.
8. When surveyed Spanish BEV drivers were asked about the longest waiting time at a public recharging point, 19% never wait when this is occupied (they leave without recharging), while 16% waited for 15 minutes or less. Still, 59% waited between 15 minutes to 1 hour., and 6% waited for 1 hour or more.
9. Most Spanish BEV drivers know which recharging connector or plug is compatible with their car and have a clear overview of the recharging points in their vicinity.
10. For Spanish BEV drivers, the main problems encountered when travelling abroad are the limited range of their vehicle and long and slow recharging times. On the other hand, 67% found their experience when recharging abroad easy or very easy.
11. The most important criteria to eventually buy a V2G compatible BEV are having a sufficient V2G recharging infrastructure and a similar purchase price to their current BEV. 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 2,013 respondents, of which 1,976 were filled out by non-BEV drivers and 37 by BEV drivers. The number of BEV drivers' responses from the EAFO 2023 survey is not representative due to the small sample size. The results described in this report only indicate the mobility and recharging behaviour of a limited group of BEV drivers.

Following Section 1 on key findings and conclusions, Section 2 presents the surveyed Spanish participants' attitude, interest, and the information that could support BEV (potential) drivers. Section 3 focuses only on BEV drivers providing an insight into the Spanish BEV drivers' e-mobility and recharging 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 Spain in terms of passenger BEVs and recharging infrastructure based on the most recent data from EAFO.

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.

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

This section presents the results of the merged datasets of the surveyed Spanish non-BEV and BEV drivers: 2,013 valid responses from BEV (37) and non-BEV drivers (1,976). 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 Spanish BEV driver is represented by a 35 to 55-year-old man living in an apartment with a high income and a high education level. The main differences when compared to Spanish non-BEV drivers' representation are the household income, and the education level.

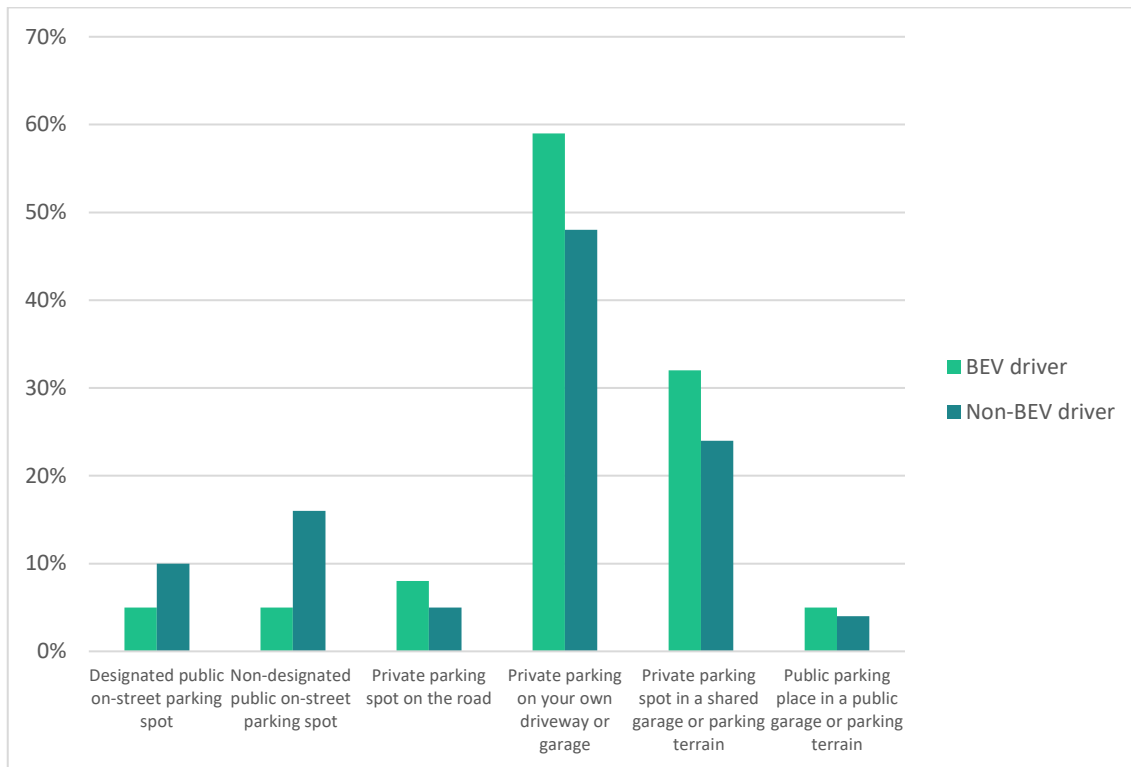
Table 1 – Socio-demographic results from the survey.

		BEV Driver	Non-BEV driver
Gender	Female	41%	51%
	Male	59%	49%
Age	<35	46%	26%
	35-55	43%	47%
	55+	11%	27%
Income	< 800 €	0%	7%
	800-1,999 €	22%	36%
	2,000-3,999 €	30%	40%
	4,000-5,999 €	35%	13%
	≥ 6,000 €	13%	4%
Education	Primary education	0%	3%
	Secondary education	24%	52%
	University or other higher education (e.g., college, polytechnic, academy, etc.)	76%	45%
Housing	Apartment/studio	49%	70%
	Attached house	11%	9%
	Semi-detached house	16%	9%
	Detached house	22%	11%
	Other	2%	1%

Source: EAFO Consumer Monitor and Survey 2023.

Most surveyed drivers surveyed live in an apartment and indicated that they can park at a private parking on their driveway or garage.

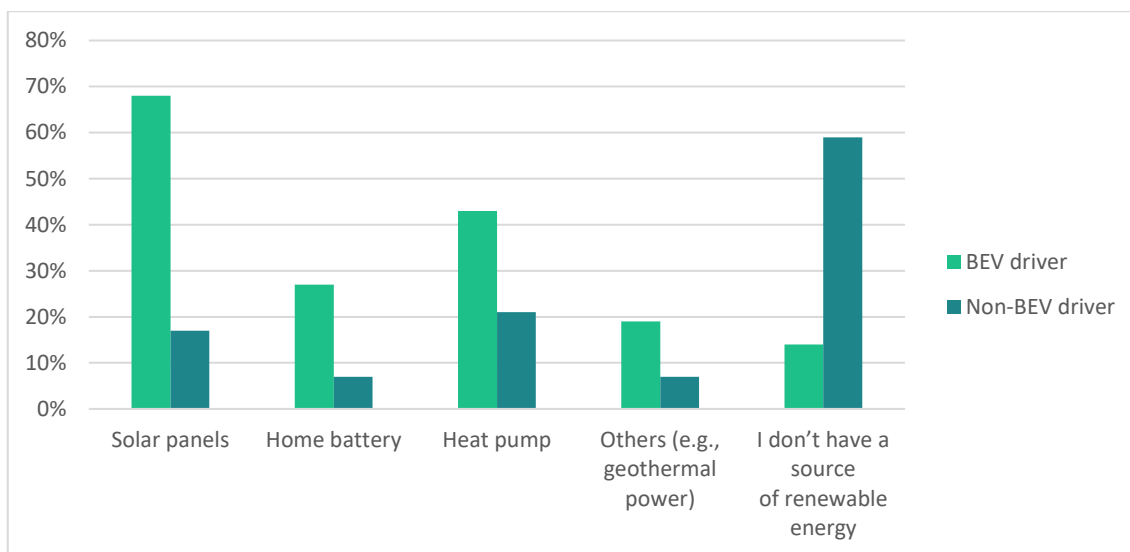
1. Spanish drivers identified parking options (multiple answers were possible).



Source: EAFO Consumer Monitor and Survey 2023.

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

2. Figure: Spanish 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 Spanish specified that they are (very) familiar with battery electric driving and 49% are interested in this. The main BEVs' advantage is that these are considered better for the 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)	49%
Top three advantages BEVs (all surveyed drivers)	Better for climate (no tailpipe CO ₂ emissions), economical to use, driving characteristics (quiet, comfortable, fast, etc.)

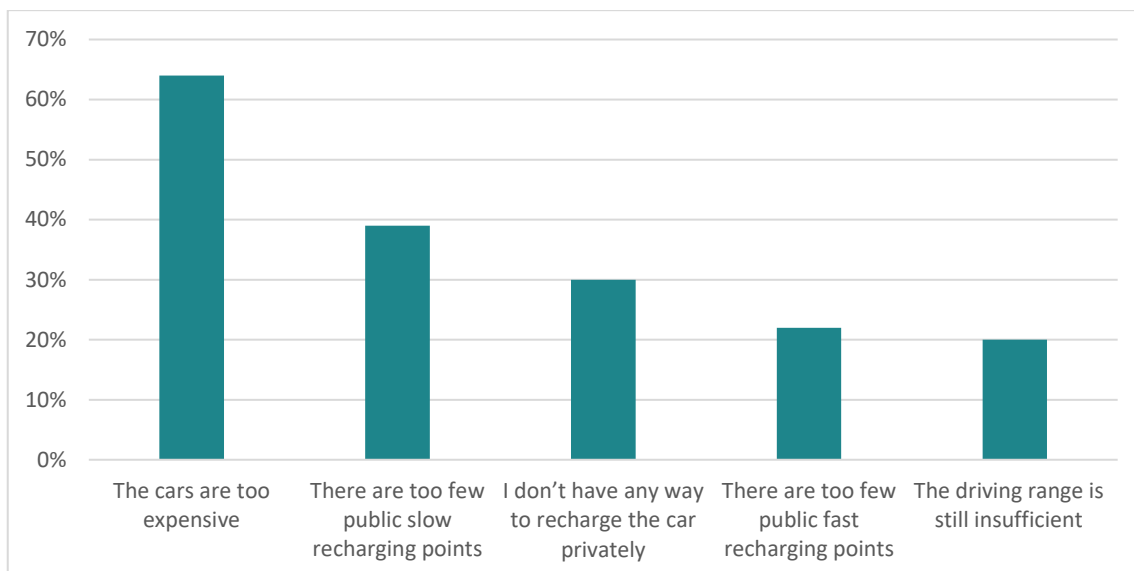
Source: EAFO Consumer Monitor and Survey 2023.

2.3. Main barriers and opportunities to adopt battery electric vehicles

Spanish surveyed 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: Spanish drivers' top 5 identified disadvantages of battery electric vehicles (multiple answers were possible).

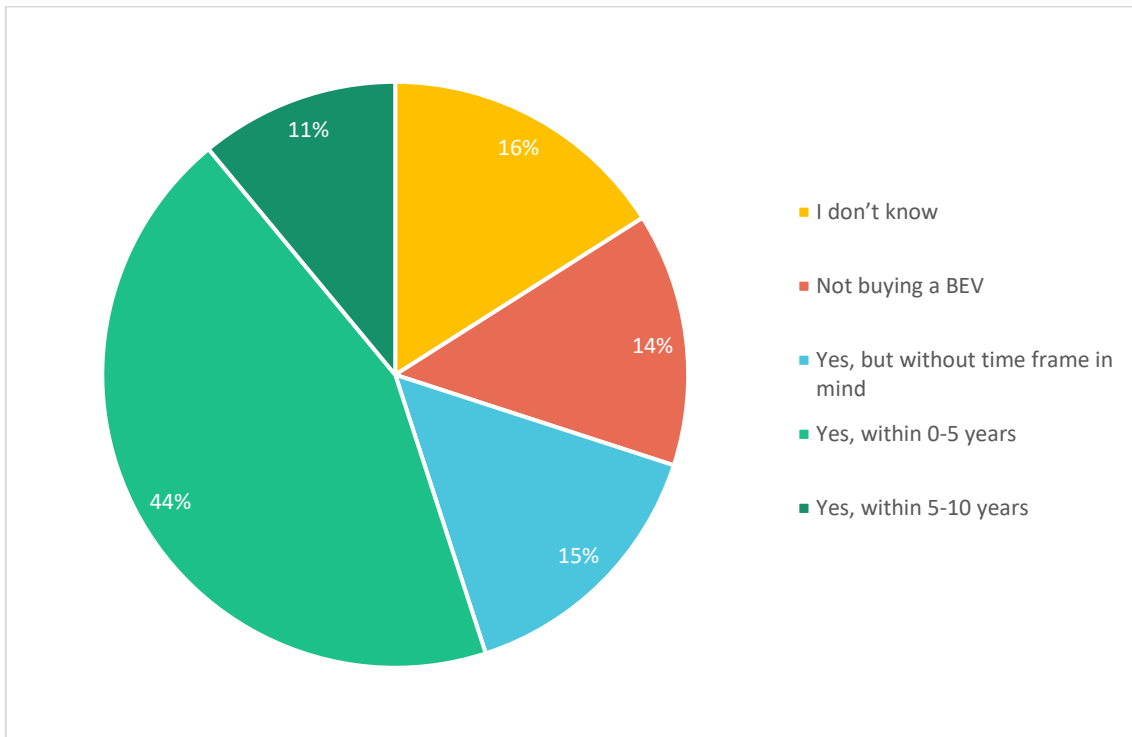


Source: EAFO Consumer Monitor and Survey 2023.

2.4. Time frame to buy a battery electric vehicle

14% of the Spanish non-BEV driver respondents do not consider buying a battery electric vehicle. 44% expect to do so in a time frame of 0-5 years.

4. Figure: Spanish non-BEV drivers' timeframe to buy a battery electric vehicle.



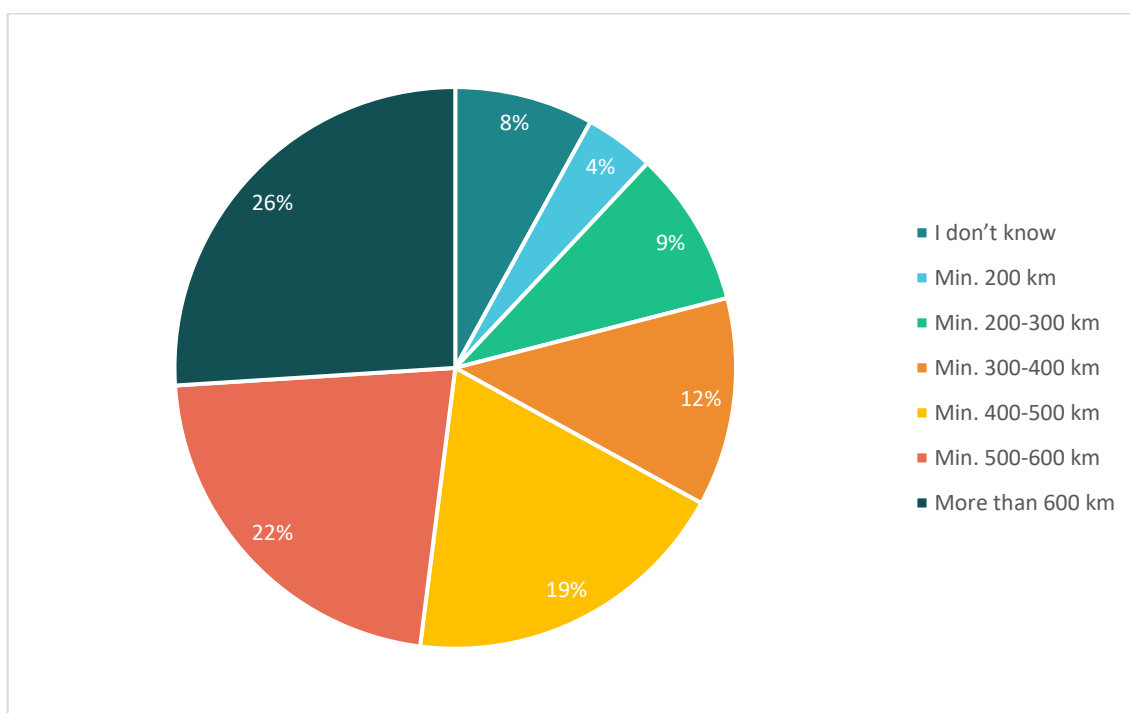
Source: EAFO Consumer Monitor and Survey 2023.

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

The median price that all Spanish respondents are willing to pay for a new or used Internal Combustion Engine Vehicle (ICEV) is 18,000 € while for a new or used BEV is 20,000 €.

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 31% of non-BEV Spanish drivers surveyed. 500 km and more would be the preference of 48%.

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



Source: EAFO Consumer Monitor and Survey 2023.

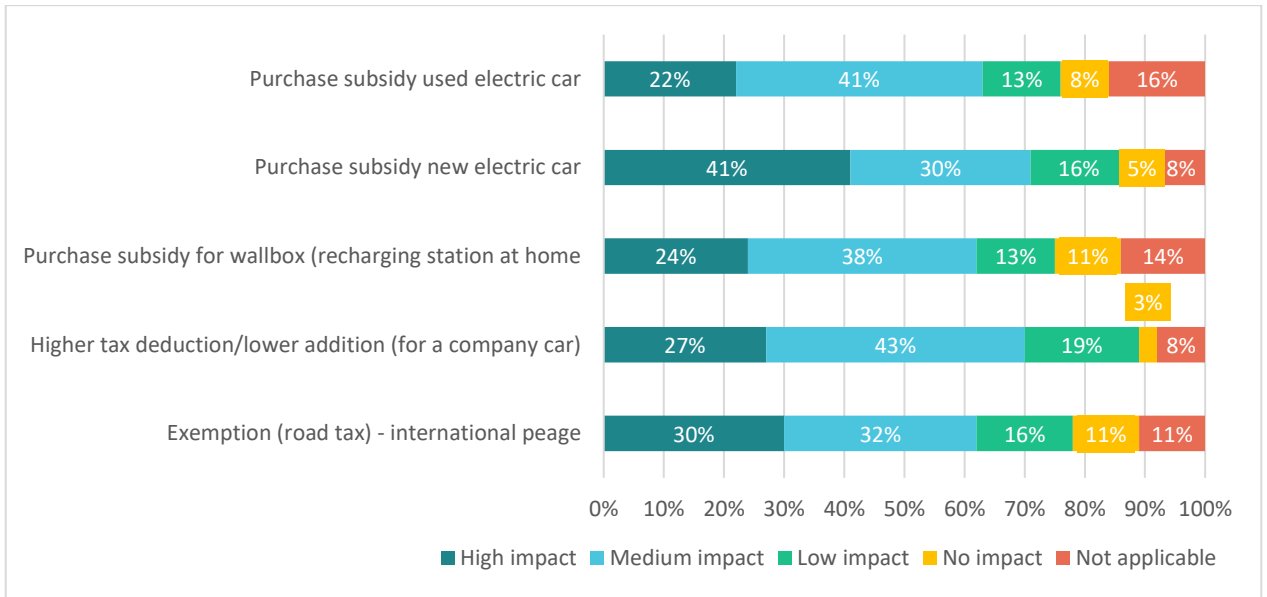
The current BEV market consists of a considerable amount and variety of models (115 individual models, and 286 model variations) with a range between 300 and +600 km (models' variance in March 2024 according to the EAFO). On the other hand, there are only thirteen BEV models available with a purchase 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

Spanish 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, cost comparison with fossil fuel cars, and a test drive were the most relevant support measures.

In addition, they also responded to the impact of different governmental incentives on the decision to drive an electric vehicle. A subsidy to purchase a new BEV and road tax exemptions are the incentives with a high perceived impact.

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



Source: EAFO Consumer Monitor and Survey 2023.

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. Interestingly, 38% of the surveyed Spanish indicated that they are not aware of any subsidies for electric driving.

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

This section focuses on BEV Spanish drivers (37 valid responses). The number of BEV drivers' responses from the EAFO 2023 survey is not representative due to the small sample size. The results described in this report only indicate the mobility and recharging behaviour of a limited group of BEV drivers.

3.1. Mobility behaviour and vehicle ownership

95% of the BEV Spanish 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 Spanish BEV drivers have less than one to 3 years of experience as a BEV driver.

3. Table: BEV driver mobility behaviour and vehicle ownership.

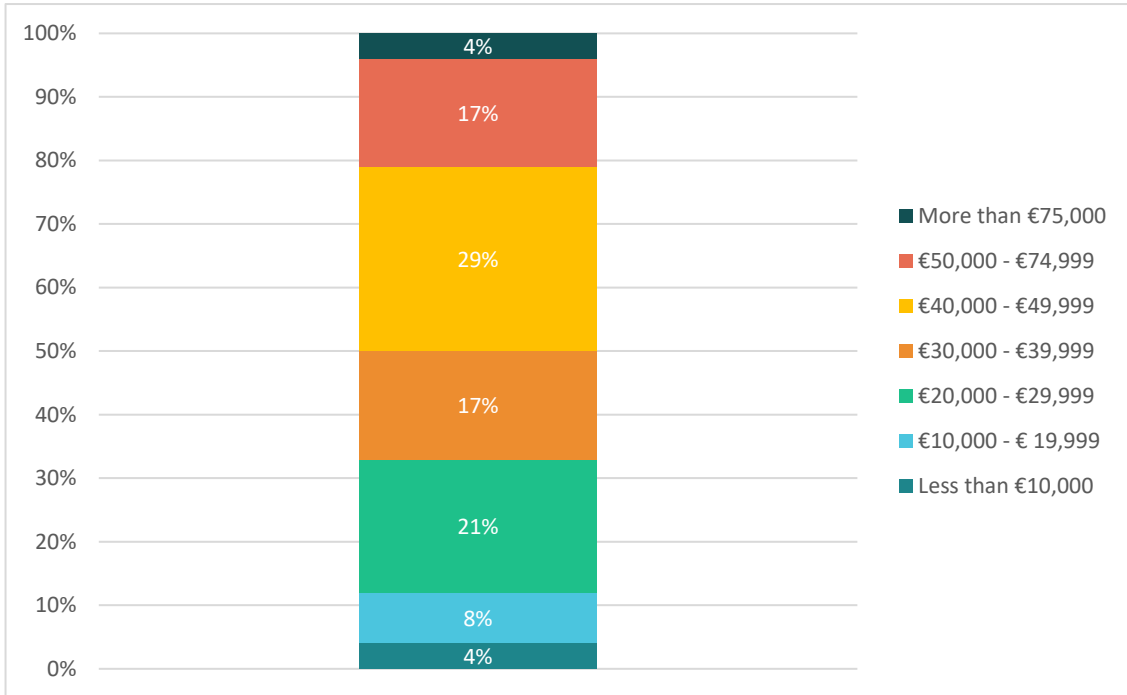
	Results
< 1 year to 3 years as BEV driver	68%
3 years to 5 years or longer as BEV driver	32%
km driven per year (median)	15,000
km driven per day (median)	55
BEV drivers using their vehicle daily to several times a week	95%
Main activity when driving their BEV	Commuting and work activities
BEV ownership (BEV as main car)	
Leased BEV (business)	0%
Leased BEV (private)	14%
BEV company car (if employee)	3%
Privately owned BEV	83%
New vs. second-hand BEVs (BEV as main car)	
New BEV	92%
Second-hand BEV	8%

Source: EAFO Consumer Monitor and Survey 2023.

3.2. Purchase and lease price paid by BEV drivers

Surveyed BEV Spanish drivers indicated the purchase price paid when their BEV is the main vehicle. For 38% this was between 20,000 € and 39,999 €. 4% paid less than 10,000 €, 50% paid 40,000 € or more.

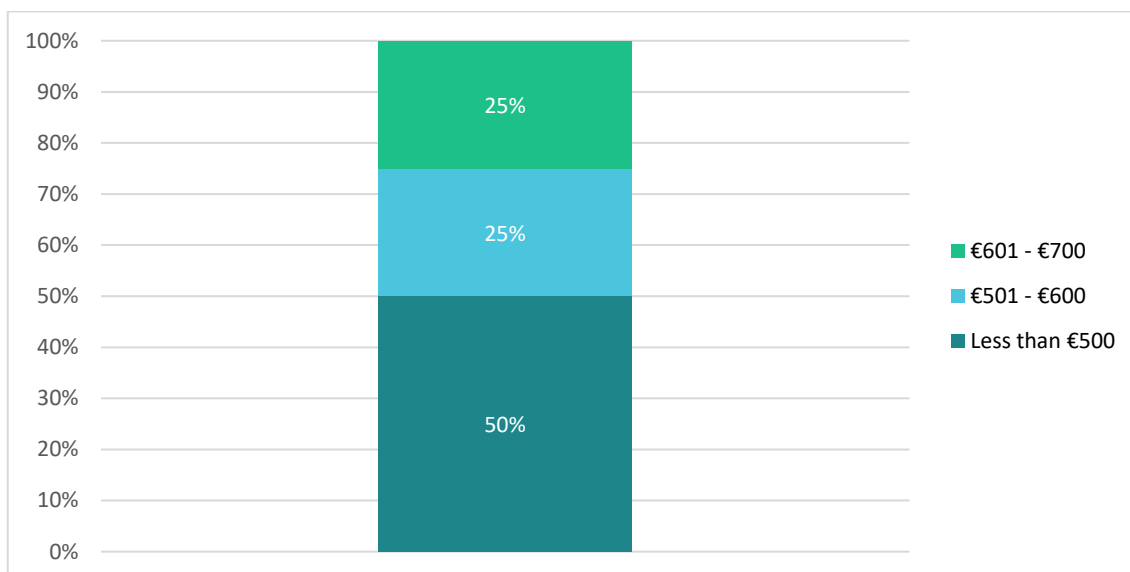
7. Figure: Spanish BEV drivers' purchase price for their battery electric vehicle.



Source: EAFO Consumer Monitor and Survey 2023.

On the other hand, 14% of the Spanish BEV driver participants responded that their first car was leased (privately). 50% pay less than 500 € per month, while 50% pay more than 501 €.

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



Source: EAFO Consumer Monitor and Survey 2023.

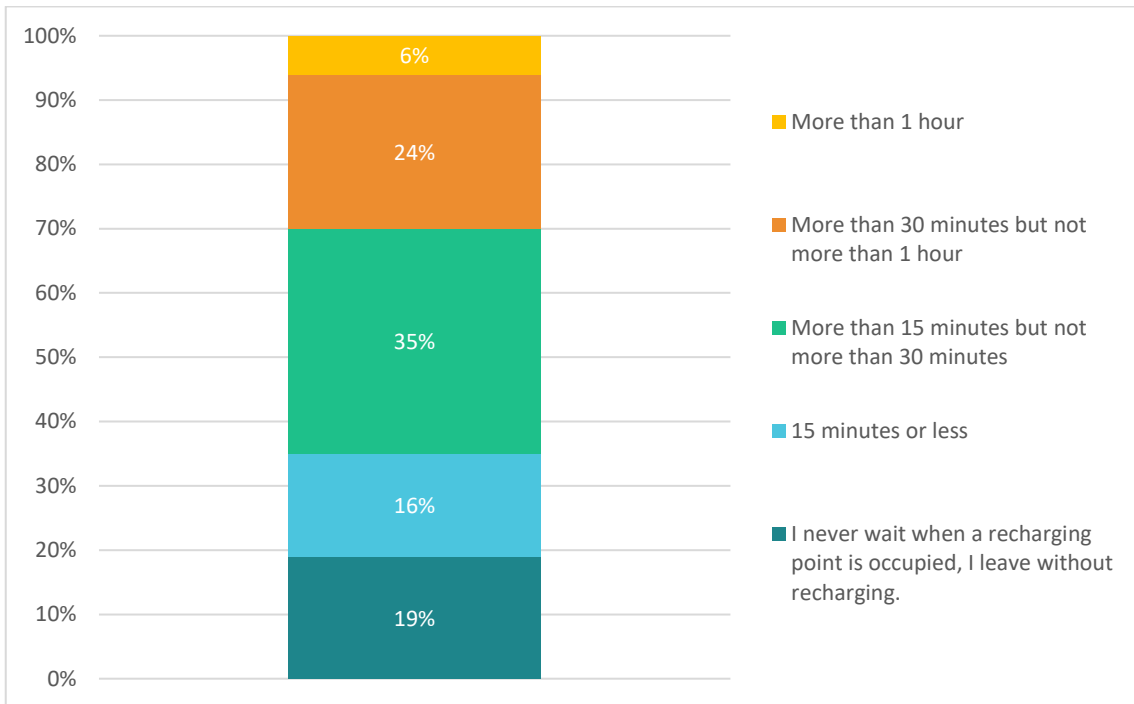
3.3. Factory range and range satisfaction of full-electric cars used by BEV drivers

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. 3% of the Spanish drivers indicated a factory range until 200 km, 41% between 201 km and 400 km, 52% of more than 401 km, and 4% did not know the factory range of their car. The factory range of the first car was usually or always enough for 90% of the surveyed Spanish BEV drivers.

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

Surveyed BEV Spanish drivers were asked what the longest waiting time was to use a public recharging point. 19% never wait when this is occupied (they leave without recharging), while 16% waited for 15 minutes or less. Still, 28% waited between 15 minutes to 1 hour. Furthermore, 46% responded that they recharge their BEV when the battery level reaches a certain threshold.

9. Figure: Spanish drivers' waiting times when using a public recharging point.

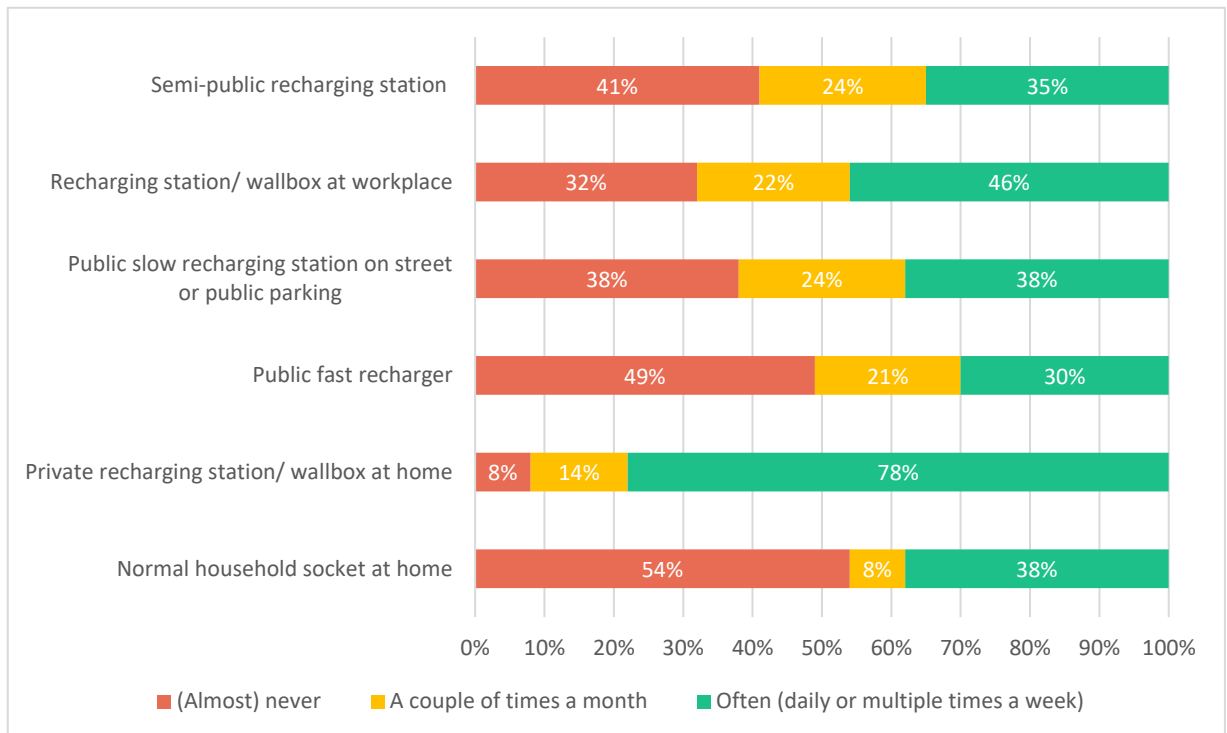


Source: EAFO Consumer Monitor and Survey 2023.

3.5. Recharging location and frequency of use by BEV drivers

For BEV Spanish 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 (38% and 30% respectively).

10. Figure: Recharging location and frequency use by Spanish BEV drivers.

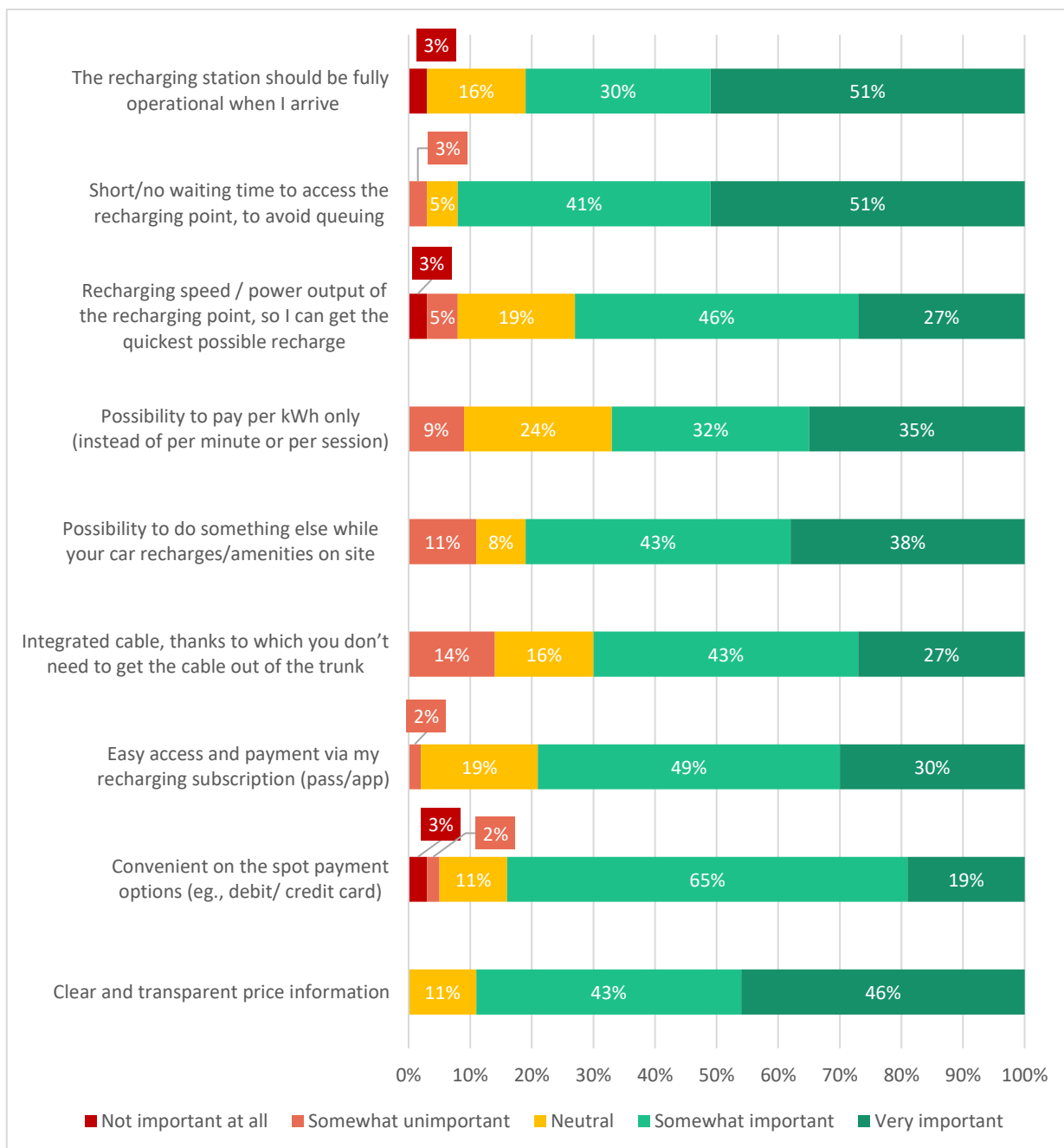


Source: EAFO Consumer Monitor and Survey 2023.

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

Spanish BEV driver respondents were asked to indicate the most important characteristics of a public recharging session. Short or no waiting time to access a recharging point, a fully operational recharging station when arriving, and clear and transparent price information were considered the most important ones. Convenient on-the-spot payment options and an integrated cable were considered less important.

11. Figure: Important characteristics for Spanish BEV drivers of a public recharging session.

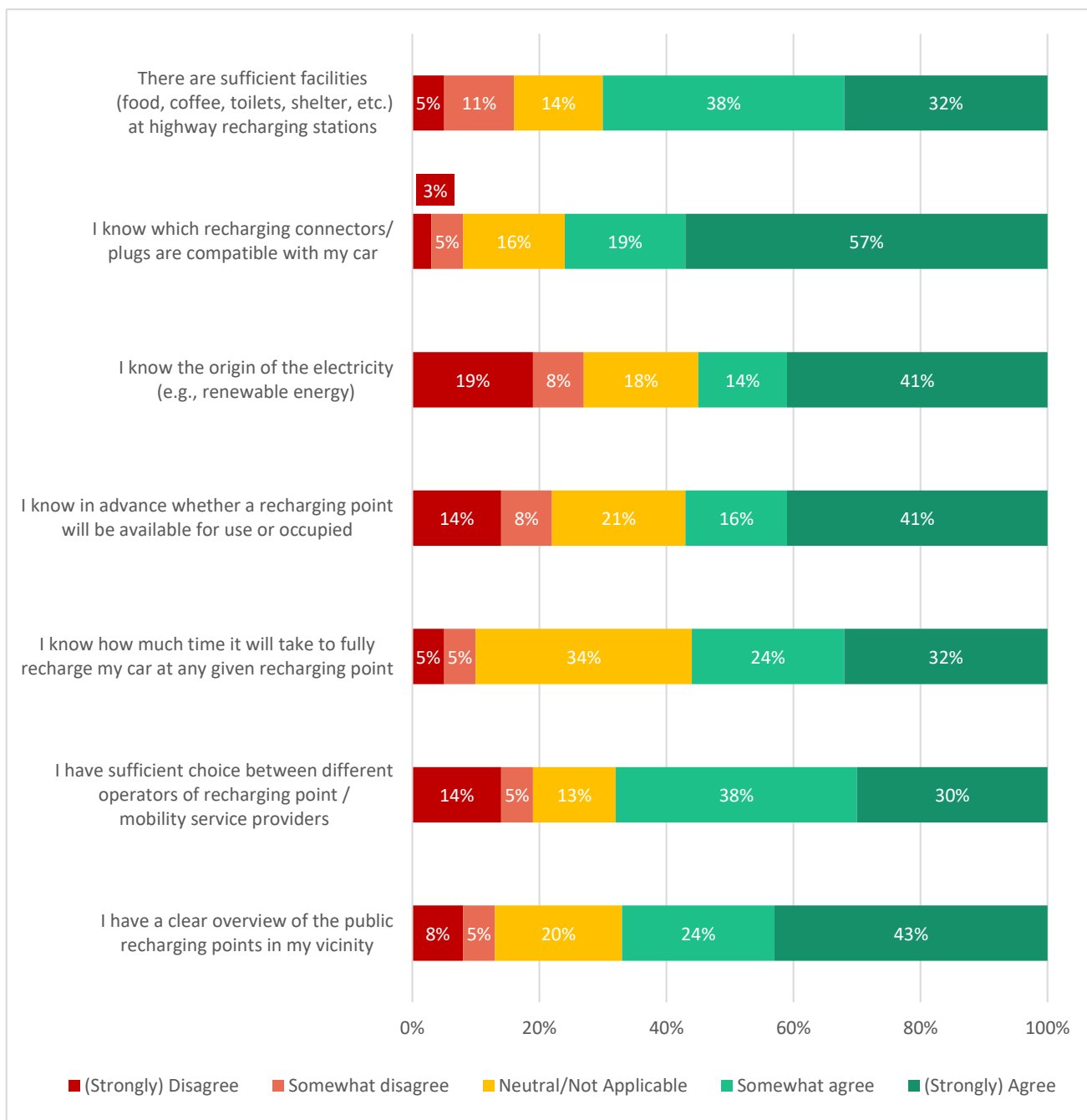


Source: EAFO Consumer Monitor and Survey 2023.

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

Most Spanish BEV drivers know which recharging connector or plug is compatible with their car and have a clear overview of the recharging points in their vicinity. They also indicated that they do not have a sufficient choice between different recharging point operators or mobility service providers.

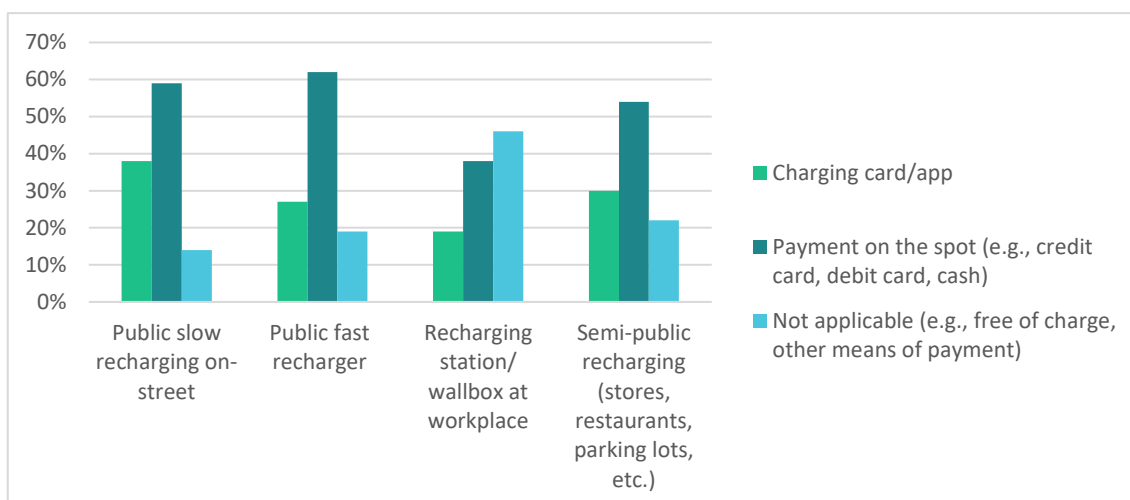
12. Figure: Public recharging points opinions of Spanish BEV drivers.



Source: EAFO Consumer Monitor and Survey 2023.

In all public and semi-public recharging stations, a payment on the spot is the most used payment option.

13. Figure: Payment options used at recharging station by Spanish BEV drivers.

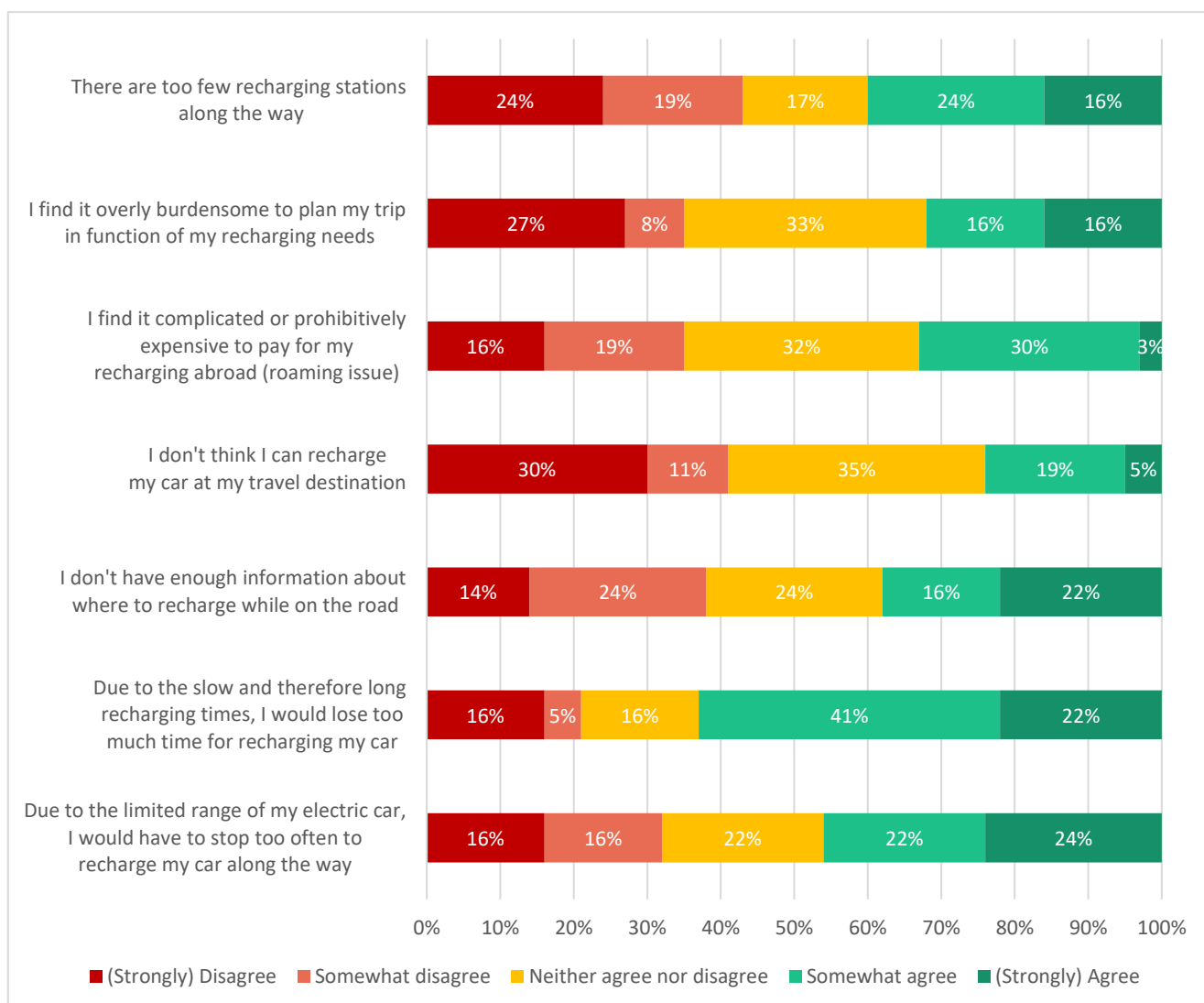


Source: EAFO Consumer Monitor and Survey 2023.

3.8. Main problems encountered by BEV drivers when travelling abroad

14% of the Spanish BEV drivers responded that they have travelled multiple times abroad with their BEV, 27% have travelled once, and 59% have never used their BEV to travel abroad. When they were asked to indicate the main problems encountered when travelling abroad, their limited range of their vehicle and slow and long recharging times were the main issues identified.

14. Figure: Spanish 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, 20% specified that it was (very) easy, while 13% considered it as difficult.

4. Table: BEV driver experience when recharging abroad.

	Results
Very easy	20%
Easy	47%
Not easy, but not difficult either	20%
Difficult	13%

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

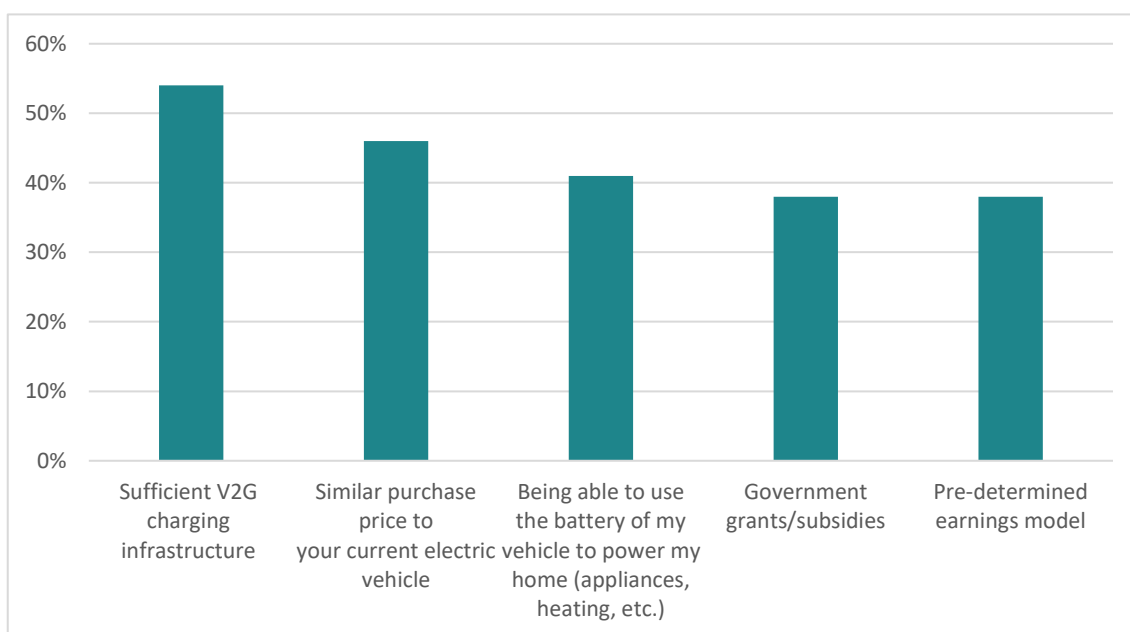
Vehicle-to-grid (V2G) refers to the interaction between Electric Vehicles and the power grid. The basic idea of V2G is to use EV batteries as intermediate storage facilities for providing services to the electric power system when BEVs are parked. For example, giving energy back to the grid when the car is not in use. Spanish BEV drivers were asked if they were aware of this technology. 38% had never heard of it, while 11% indicated being aware and having knowledge about this.

5. Table: BEV driver V2G awareness

	Results
No, never heard of it	38%
Yes, heard of it, but know nothing/just a little bit about it	51%
Yes, heard of it and know quite a bit/a lot about it	11%

Moreover, 68% of Spanish 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 to have a sufficient V2G recharging infrastructure and having a similar purchase price to their current BEV car.

15. Figure: Spanish 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 results of the 2023 consumer monitor in Spain indicate the trends of a small group of BEV drivers. Most of them consider buying a BEV in the short, medium or long term, and a subsidy to buy a new BEV is the most important government incentive to drive this type of car. Most of the BEVs are new and privately owned by drivers who consider their vehicle battery level before recharging. They reported a high use of public slow and fast recharging infrastructure.

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	In 2024, Lithuania offers up to 4,000 € for new BEVs, 2,500 € for used EVs, and tax incentives, since the 1st of January 2023, VAT deductions apply on EV purchases up to 50,000 €.

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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%		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%	Subsidy buying a new EV	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			

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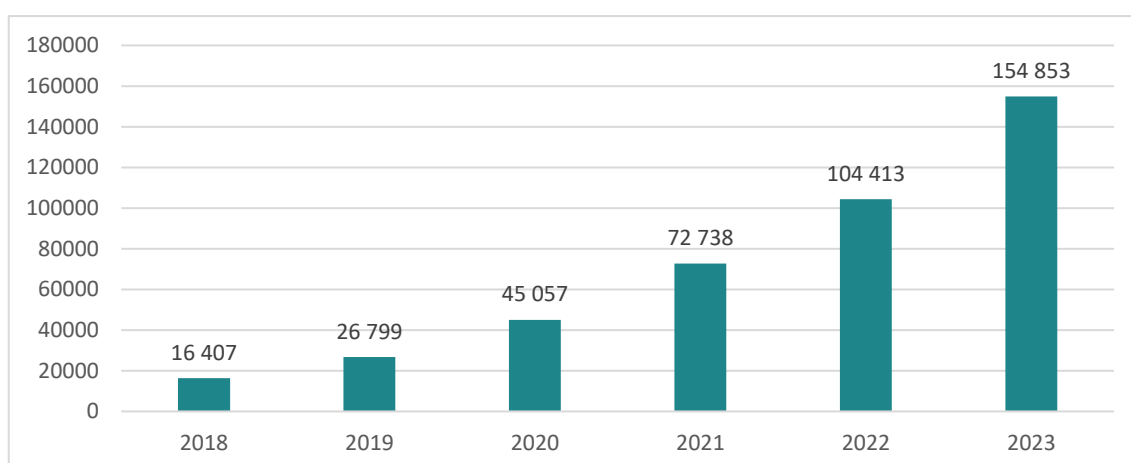
Country	Waiting time 15 min or less	BEV drivers recharging considering battery level	% time using slow public recharging point daily/per week	% time using fast public recharging point daily/per week	Most important characteristic public recharging session	Most used payment option at slow recharging points	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 Spain

The Spanish 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 Spain](#))

Spain's MOVES initiatives provide various subsidies for electric vehicles (EVs). MOVES I in 2020 offered 4,000 €, increasing to 5,500 € with a scrappage addition. MOVES II, starting in July 2020, maintained similar subsidies, awaiting regional government publication for execution. MOVES III, initiated on April 13, 2021, and extended until July 31, 2024, boosts the budget to 400 € million, potentially doubling to 800 € million. It offers 4,500 € for new BEVs, and 7,000 € if scrapping a 7+ year-old ICE vehicle, with conditions including a 90 km range minimum and a 45,000 € price cap (53,000 € for 8-9 seaters). In addition to purchase subsidies, Spain provides a 75% reduction in road tax for BEVs in major cities and a VAT exemption in the Canary Islands for low-emission vehicles. Company cars enjoy a 30% income tax reduction if valued under 40,000 € for BEVs and PHEVs. Charging infrastructure benefits from scaled financial aid, with up to 70% subsidy for the self-employed and higher in small municipalities. Other incentives include toll and parking exemptions and reserved traffic lanes for BEVs.

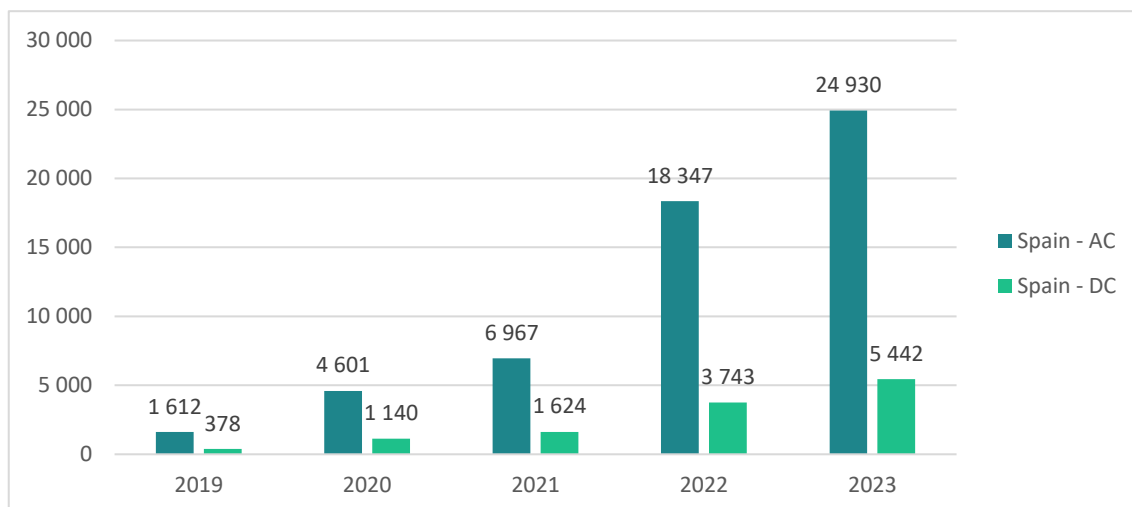
16. Figure: Evolution of the total BEV passenger vehicles in Spain.



Source: EAFO portal.

For the year 2023, there were 154,853 BEVs, representing 0.61% of the total passenger vehicles fleet in Spain.

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



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 24,930 (AC) slow public recharging points, and 5,442 (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 in Spain, 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 2,013 responses were considered valid for both the panel and the AVERE and external contributors' datasets. Out of these, there were 1,976 non-BEV and 37 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.

