

Poll results.

Is the EU driving in the direction people want?

Technology neutrality and decarbonisation | Poll by Yougov (July 2026)

EXECUTIVE SUMMARY



Poll by Yougov

- **Across 5 key automotive markets:** France (N=1067), Germany (N=1009), Italy (N=1028), Poland (N=1054), and Spain (N=1063).
 - **Core sample:** c. 1,000 nationally and politically representative respondents across these countries. 5,221 adults (18+) in total.
 - **Goal:** Assess citizen perception - *Is the EU driving in the direction people want?*
-

- **Results** - The average consumer surveyed:



- Rejects an automotive technology ban,
- Is considering a range of powertrain options for their next vehicle,
- Sees a need for further preparation in their country for full electrification.

- **Current EU climate policy is out of step with consumer realities:** For policymakers, the review of CO₂ standards for cars and vans presents a critical opportunity to enable a wider set of drivetrain technologies and truly align climate policies with citizen expectations.



TECH NEUTRALITY AND DECARBONISATION POLICIES

Poll question



A. DRIVETRAIN AND TECH NEUTRALITY

Question 1

Thinking about your next vehicle purchase, which of the following, if any, are you most likely to purchase? Please select up to two.

- Battery electric vehicle (BEV)
- Electric Plug-in hybrid vehicle (PHEV) or Electric Range extender vehicle (EREV)
- Hybrid vehicle (HEV),
- Hydrogen fuel cell vehicle
- Vehicle running only with renewable fuels (e-fuels, advanced biofuels)
- Petrol vehicle
- Diesel vehicle
- None of the above
- Don't know
- Not applicable – I will not be purchasing a vehicle



A. DRIVETRAIN AND TECH NEUTRALITY

Question 2

Thinking about carbon emissions in the EU, which of the following comes closest to your view?

- <1> The EU should ban high-emission vehicles completely
- <2> The EU should incentivise low-emission vehicles, but not ban high-emission vehicles
- <3> The EU should not have any involvement in the vehicle market
- <4 > Don't know



RESULTS

Tech neutrality and decarbonisation policies



TOPLINE - DRIVETRAIN AND TECH NEUTRALITY



Consumer purchase intentions are widely distributed across various powertrains

Tech choice

- **No single technology dominates consumer preference.**
- Where consumer demand sits today (average across the 5 markets): Petrol (29%); Diesel (14%); HEV (20%); PHEV/EREV (13%); BEV (8%)
- **BEVs adoption lags behind:** With an average purchase intention of 8%, BEVs are not the leading purchase intention in any country.
- **HEV outperform BEVs** in four of the five countries surveyed (Germany is the only exception, where the purchase intention is very similar – 13% HEV, 14% BEV).

What should the EU do?

- The most popular policy option is not banning technologies but incentivising cleaner ones (47%); 22% think the EU should not have any involvement in the vehicle market. 17% support a tech ban

ITALY - DRIVETRAIN AND TECH NEUTRALITY



Conventional powertrains remain the most dominant

Tech choice

- Petrol (26%) and Hybrid Electric Vehicles (HEV) (23%) are the two most preferred options or respondents' next vehicle purchase
- Demand for fully EV remain limited: only **6%** would choose a Battery Electric Vehicle (BEV)
- HEVs account for 23% while 12% would opt for a Plug-in Hybrid (PHEV/EREV).

What should the EU do?

- Nearly half of respondents (47%) believe the EU should incentivise low-emission vehicles without banning high-emission vehicles
- 22% support a complete ban on high-emission vehicles.
- 13% believe the EU should have no involvement in the vehicle sector.

Combustion engine vehicles lead

Tech choice

- **Consumer preferences are spread across different technologies:** petrol (22%); diesel (19%); 18% HEV (18%); PHEV/EREV (12%) and BEVs (8%)
- **Strong political divide:** 2022 Le Pen voters favour petrol (31%) over diesel/hybrid, while Macron voters lean more toward hybrid (24%). EV purchase intent is higher among Macron voters (11%) vs. Le Pen voters (6%)

What should the EU do?

- **There is a preference on incentives over a full ban:** 42% want incentives without a ban on high-emission vehicles, and 16% support a full ban.
- 26% think the EU should have no involvement at all (mainly Le Pen voters – 42%)
- Younger respondents (18-34) are most supportive of a full ban (24%), more than double the rate of 55+ voters (11%)



SPAIN - DRIVETRAIN AND TECH NEUTRALITY



Hybrids and petrol vehicles are equally preferred

Tech choice

- Spanish consumers display a **diversified technology mixes: Hybrids equal petrol vehicles** as the most attractive purchasing option (24% each); Diesel (14%); PHEV/EREV (17%) and BEV (8%).
- Spain registers the highest HEVs purchase intention across all the five countries (24%).

What should the EU do?

- Spain records the **highest support for incentives and no ban** among all five countries surveyed (56%).
- Only 21% of respondents support a ban, while 13% believe the EU should not have any involvement in the vehicle market.



POLAND - DRIVETRAIN AND TECH NEUTRALITY



Petrol vehicles ahead of all other powertrains

Tech choice

- **Petrol remains the main choice for the next vehicle purchase (40%)**, ahead of all alternative powertrains.
- **Hybrid vehicles are the strongest alternative to conventional engines**, with 21% planning to purchase a HEV and 10% considering a plug-in hybrid/range extender vehicle.
- Pure electric vehicle preference remains limited, with only 4% planning to buy a BEV.

What should the EU do?

- **Consumers favour incentives over bans on emissions policy**: nearly half (47%) believe the EU should encourage low-emission vehicles without banning high-emission vehicles, while 26% believe the EU should not be involved in the vehicle market at all.
- Only 10% support a complete ban on high-emission vehicles.



GERMANY - DRIVETRAIN AND TECH NEUTRALITY



Strong interest in electrified powertrains, but petrol leads

Tech choice

- German consumers are divided between conventional and electrified vehicles. **Petrol remains the single most popular choice** (34%).
- Interest in electrified powertrains is the highest among all the five countries, with 14% considering a BEV, 13% a hybrid (HEV), and 12% a plug-in hybrid/range extender (PHEV/EREV)
- Younger Germans are more open to electrification, with 18% of 18-34s who would consider a BEV.

What should the EU do?

- **Consumers favour incentives over bans.** The most popular position on emissions policy is that the EU should incentivise low-emission vehicles without banning high-emission vehicles (43%), substantially ahead of both a complete ban (15%) and no EU involvement (30%).
- **There is no majority support for banning high-emission vehicles**, with only 15% support a full ban
- A minority wants less EU intervention. Nearly one-third (30%) say the EU should not be involved in the vehicle market at all, rising to 68% among AfD voters.



TRANSITION READINESS

Poll question



B. TRANSITION READINESS

Localised infrastructure anxiety, financial insecurity, and urban-rural divide

Generally speaking, how prepared, if at all, do you think each of the following is for all new personal vehicles to be fully electric?

-[TR1_1] You personally

-[TR1_2] COUNTRY

<1> Very prepared

<2> Fairly prepared

<3> Not very prepared

<4> Not at all prepared

<5> Don't know



B. TRANSITION READINESS

Localised infrastructure anxiety, financial insecurity, and urban-rural divide

[only those that said country is not very or not at all prepared] You previously said that you think COUNTRY is not prepared for all new personal vehicles to be fully electric. Which of the following, if any, do you think needs to be improved in order for COUNTRY to be prepared?

- <1> Availability of charging infrastructure
- <2> Affordability of vehicles
- <3> Electricity prices generally
- <4> Electricity grid capacity
- <5> Range (distance that can be covered in a single charge)
- <6> Availability of electric vehicles
- <7> Battery production and supply chains
- <8> Charging times
- <9> Environmental impact of batteries
- <11> Other
- <12> None of these
- <13> Don't know



TOPLINE - TRANSITION READINESS



Consumers don't see themselves or their countries ready for full electrification

Personal readiness

- On average across the 5 markets, **68% do not feel personally prepared for all new cars to become fully electric.**

Perception of country's readiness

- Respondents consistently think that **their country is even less prepared than they are:**
 - Personal preparedness averages 23%, while country preparedness is 17%.
 - 75% of respondents answered that their country is not prepared for full electrification. This pessimistic view of national readiness is a consistent trend across all surveyed countries

Top barriers

- Among respondents saying their country is not prepared, the top barriers (averaged across the 5 markets in a multiple-choice question) are: vehicle affordability (46%); charging infrastructure availability (46%); range (39%); electricity prices generally (35%).



ITALY - TRANSITION READINESS



Results 1/2

Personal readiness

- Two-thirds of respondents (67%) do not feel personally prepared for all new cars to become fully electric, while only 25% feel prepared.
- Preparedness is higher among **younger respondents** (32% among 18-34 year olds), but remains a minority view across all age groups.

Perception of Italy's readiness

- Italians are even more pessimistic about the country as a whole: 77% believe Italy is not prepared, compared with only 17% who think it is.
- This perception is consistent across age groups, regions and political affiliations.



ITALY - TRANSITION READINESS



Results 2/2

Top barriers

- **Affordability is the top priority:** nearly half of respondents (47%) believe the cost of electric vehicles is the main barrier to a successful transition
- **Energy costs are also a major concern:** 42% identify electricity prices as an obstacle, suggesting that running costs are as important as purchase prices
- **Infrastructure in Italy remains critical:** 40% cite the availability of charging infrastructure, while 32% highlight the limited driving range of EVs
- One-quarter (**25%**) believe charging times still need to improve
- **Manufacturing and supply chain issues are secondary:** Fewer respondents mention battery production or supply chains (10%), indicating consumers are primarily focused on practical and economic barriers



FRANCE - TRANSITION READINESS



Results

Personal readiness

- **Younger respondents feel significantly more prepared than older generations** (37% of 18-34% are prepared for electrification, compared to 14% of 55+).

Perception of France's readiness

- The Paris Region is noticeably more confident about both personal and national readiness than the rest of France (Paris 34% vs National 23% personal preparedness, Paris 32% vs National 20% national preparedness).

Top barriers

- **Affordability stands out as the dominant concern** (63%).



SPAIN - TRANSITION READINESS



Results

Personal readiness

- Spain stands out as the country where respondents feel most personally prepared for a fully electric transition: 27% of Spanish citizens consider themselves prepared. This is nevertheless, the highest level among the five countries surveyed.

Perception of Spain's readiness

- 19% considers that Spain is "prepared" for full electrification, while 75% consider it unprepared.

Top barriers

- A majority of Spanish respondents identify **charging infrastructure** (56%) as the main obstacle. 44% cite range as a barrier, while 36% are concerned about affordability of vehicles.



POLAND - TRANSITION READINESS



Results

Personal readiness

- A clear majority do not feel ready for a fully electric vehicle (70%), only 16% of the respondents consider themselves ready
- We can see that middle aged (35-44) respondents feel generally more prepared (23%) than older and younger respondents

Perception of Poland's readiness

- Respondents believe that Poland is even less ready than they personally are: only 13% think Poland is ready for an EV transition, while 76% believe the country is not prepared

Top barriers

- Cost is one of the biggest barrier: nearly half of the respondents (48%) say that EV affordability should improve. Electricity price is also a major concern, selected by 42% of the respondents
- Charging infrastructure is equally important, with 47% of respondents highlighting the need for better availability of charging stations
- In general, infrastructure and costs matter the most



GERMANY - TRANSITION READINESS



Results

Personal readiness

- **Most Germans do not feel ready for a fully electric future.** Only 22% say they are personally prepared for all new vehicles to be fully electric, while 66% say they are not prepared.
- There is a strong age divide. Younger Germans are significantly more prepared for electrification, with 34% of 18–34-year-olds saying they are ready, compared with just 15% of over 55s

Perception of Germany's readiness

- Germany is seen as even less prepared than individuals themselves. Just 15% believe Germany is ready for a full EV transition, compared with 75% who say the country is not ready

Top barriers

- The biggest barriers are practical and economical. Among those who think Germany is not prepared:
 - 55% cite availability of charging infrastructure
 - 40% range
 - 38% electricity prices
 - 37% affordability of vehicles

About CLEPA: CLEPA, the European Association of Automotive Suppliers based in Brussels, represents over 3,000 companies, from multi-nationals to SMEs, supplying state-of-the-art components and innovative technology for safe, smart and sustainable mobility, investing over €30 billion yearly in research and development. Automotive suppliers in Europe directly employ 1.7 million people in the EU.

About the survey: All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 5,221 adults (France=1067, Germany=1009, Spain=1063, Italy=1028, Poland=1054). Fieldwork was undertaken between 7th - 16th July 2026. The survey was carried out online. The figures have been weighted and are representative of all adults in each country (aged 18+).

EUROPEAN AUTOMOTIVE SUPPLIERS AT A GLANCE



75% of the value of a vehicle comes from its parts, components, and systems



32% of total R&D investment in the EU comes from automotive, making the sector the top private investor



€30 billion are invested yearly in research and development



1.7 million direct jobs generated across the EU



+39,000 new patents are registered each year



€26.7 billion trade surplus generated in 2023