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EAFO - LUXEMBOURG - 2026

CONSUMER MONITOR 2026: COUNTRY REPORT: LUXEMBOURG

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1 The 2026 Luxembourgish EAFO consumer monitor: key findings & conclusions

The European Green Deal aims for a 90% reduction of transport-related greenhouse gas emissions by 2050 (compared to 1990), and an important interim goal is 90% reduction of CO_2 emissions for new cars by 2035. Different policies are in place to achieve this goal, including standards on CO_2 vehicle emissions, public procurement rules, and the Alternative Fuels Infrastructure Regulation (AFIR)[1, 2, 3]. Nevertheless, in 2023, the transport sector was responsible for around a third of the EU's total CO_2 emissions, 60% of which were emitted by passenger cars[4]. The passenger car is still the main mode of transport and has continued to increase its share since the year 2000[5]. 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 between 100 and 150 km to ranges of up to 400 km or more, and the recharging infrastructure network is expanding. Nevertheless, BEVs represent only 2,13% of the total passenger cars fleet in the EU, and the recharging infrastructure coverage is still limited in some countries and urban areas[6, 7].

This report highlights the main findings of the 2026 EAFO Consumer Monitor survey and presents the results for Luxembourg.

Taking these barriers and developments into account, the key findings of the 2026 EAFO consumer monitor are:

- Of the Luxembourgish participants, 55,3% are at least a bit familiar with BEVs, with 21,7% considering buying a BEV in a time frame of 0-5 years. 42,6% have a somewhat positive attitude towards BEVs, and the most important BEV advantage is Better for climate (no tailpipe CO2 emissions).
- The number one BEVs disadvantage is their price. The Luxembourgish participants are willing to pay € 30.000 for a BEV (median response), while 32,9% of the BEV drivers paid a purchase price between 20,000 € and 40,000 €.
- BEVs' insufficient range is also considered a limitation. A minimum desired range between 300 km to 500 km was the choice of 20,9% of all Luxembourgish drivers surveyed. 500 km and more would be the preference of 70,7%. On the other hand, 33,7% of the Luxembourgish BEV drivers indicated a factory range between 200 km and 400 km.
- 96,8% of Luxembourgish BEV drivers use their vehicles daily or several times a week. Their BEV is mostly new (90,4%) and privately owned (69,2%).
- Limited recharging private or public options are also considered a disadvantage. Luxembourgish BEV drivers indicated that the most used location to recharge is a recharging

[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] European Commission: Directorate-General for Mobility and Transport, EU transport in figures – Statistical pocketbook 2025, 2025, https://data.europa.eu/doi/10.2832/2584130
[5] https://www.transportenvironment.org/topics/cars
[6] Van Mierlo, J., Berecibar, 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.
[7] https://alternative-fuels-observatory.ec.europa.eu/

station or wallbox at home (used 60,9% of the time on daily basis or several times a week). Public slow and fast recharging points are less often used (8,4% and 2,5% respectively).

- Luxembourgish BEV drivers specified that the main problems encountered when travelling abroad "*Due to the limited range of my electric car, I would have to stop too often to recharge my car along the way*", "*There are too few recharging stations along the way*", "*I find it overly burdensome to plan my trip in function of my recharging needs*", "*Due to the slow and therefore long recharging times, I would lose too much time for recharging my car*". On the other hand, 65,3% found their experience when recharging abroad easy or very easy.
- 44,3% of Luxembourgish BEV drivers know what vehicle-to-grid (V2G) is and 46,8% are interested in buying a V2G-capable vehicle. The most important criteria to do so are "*Possibility to schedule the charging process, benefiting from lower electricity prices*" and "*Government grants/subsidies*".

The EAFO Consumer Monitor 2026 results also provide further insights concerning the three main barriers identified for BEV adoption:

1. BEV costs: the second-hand and leasing options at an affordable price need to be further considered. 6,6% of the Luxembourgish BEV drivers bought a second-hand BEV, which is 9,6% of all privately owned BEVs. Meanwhile 25,6% indicated that they lease a car privately, for which 70% pay less than 500 € per month.
2. BEV range insufficiency: The BEV achieved range was enough for 75,6% of the Luxembourgish BEV drivers. Range satisfaction can be related to the km driven per day (50 km), and the main activity for which the BEV is used (For shopping/errands (e.g., shopping, bringing and picking up the children, doctor visits, care of family members, administration)). More information about batteries and range was considered the most important support measure to have a clearer opinion about electric driving.
3. Public recharging network: Luxembourgish BEV drivers have a clear overview of the public recharging points in their vicinity (40,3% agree). 32,1% know in advance if a recharging point will be available or not and 33,3% know how much time it will take to fully recharge their BEV. Only 22,5% knows how much they will pay before starting their recharging session.

When both non-BEV and BEV Luxembourgish drivers were asked about different (governmental) incentives to support electric driving, "*A sufficient driving range*", "*A sufficiently high purchase subsidy for an EV*", "*Access to a private recharging point (at home or at work), to benefit from lower recharging prices*" are the incentives that have a higher impact. These policy measures need to be further addressed, also considering other groups less represented among BEV drivers in Luxembourg (and in other EU countries) such as females and households having a lower income.

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, automobile organisations, etc.

As part of the EAFO consumer section[8], and for the fourth year in a row besides the general EAFO survey in the EU27 Member States, a survey was launched March 2026 in 2 EU countries[9,10] 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

[8] https://alternative-fuels-observatory.ec.europa.eu/consumer-portal

[9] The three countries surveyed were: Sweden and Luxembourg.

10 Luxembourg was conducted early in 2026.

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 online panel in partnership with Dynata to have a representation of the general population, including non-BEV and BEV drivers[11].

The total number of valid responses is 1,005, of which 849 were filled out by non-BEV drivers and 156 by BEV drivers. As the number of BEV drivers is low, findings relating specifically to BEV drivers should be interpreted with caution. For a proportion measured among BEV drivers, the margin of error could be as large as ±6.6 percentage points at the 90% confidence level and ±7.8 percentage points at the 95% confidence level. In addition, the BEV driver sample may not fully reflect the diversity of the Luxembourg BEV population. Results for specific subgroups of BEV drivers (e.g. by gender, age, income or housing type) are based on smaller numbers of respondents and are therefore subject to greater uncertainty.

Following Section 1 on key findings and conclusions, Section 2 presents the surveyed Luxembourgish participants' attitudes, interests, and the information that could support BEV (potential) drivers. Section 3 focuses only on BEV drivers, providing an insight into the Luxembourgish BEV drivers' e-mobility and recharging behaviour. The final section discusses the results of six questions added to the survey by the Luxembourgish Ministry of the Economy and Ministry of Environment, Climate and Biodiversity.

11_A BEV is defined as a vehicle with no internal combustion engine and with the battery of the electric motor being recharged by the mains. For this report, BEV drivers are identified as those owning a BEV as their main, second or third car. Non-BEV drivers refer to all other respondents with a driver's license.

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

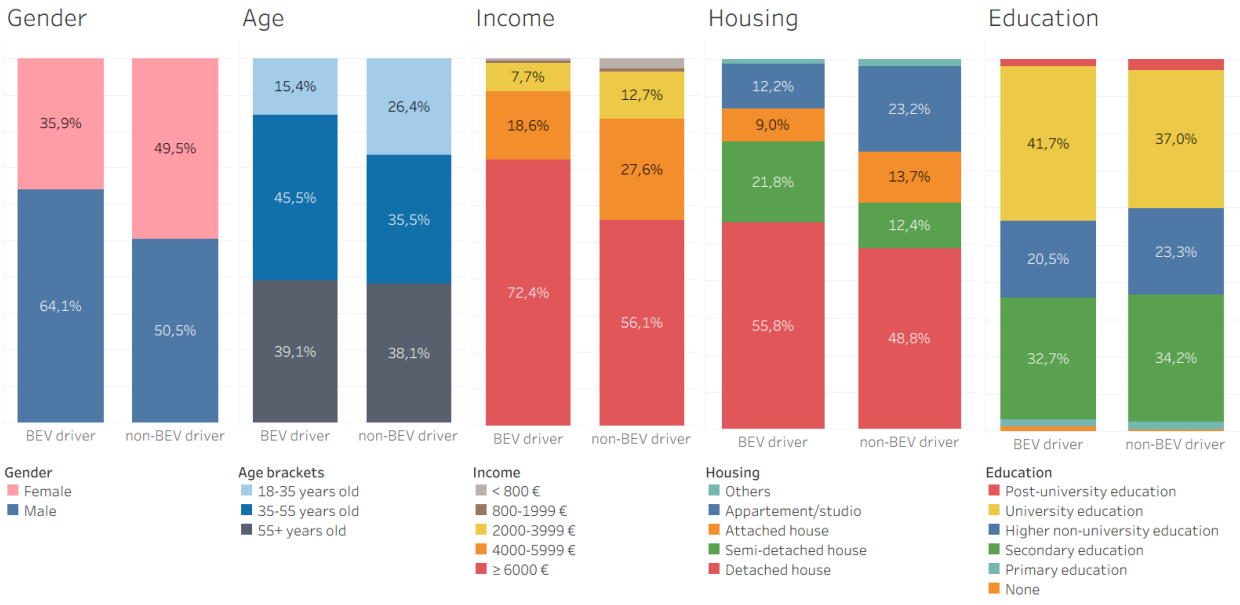
This section presents the results of the merged datasets of the surveyed Luxembourgish non-BEV and BEV drivers: 1,005 valid responses from BEV (156) and non-BEV drivers (849). It focuses on their attitudes, interests and information that could support them to further drive BEV cars. Annex I contains the precise definition of 'BEV driver'.

2.1 Socio-demographics general population

Based on the survey results, the Luxembourgish BEV driver is represented by a 51-year-old man living in a detached house with a monthly household income above €6000 and a high education level. The following graphs highlight the socio-demographic differences between BEV drivers and non-BEV drivers. Although the sample of BEV-drivers is relatively small, i.e. 156 respondents, there some clear trends can be observed:

- BEV drivers are mostly males.
- BEV drivers are typically older than non-BEV drivers.
- The household income of a BEV driver is typically higher than that of non-BEV drivers.
- BEV drivers are more likely to live in (semi-) detached houses rather than apartments and attached houses compared to non-BEV drivers.

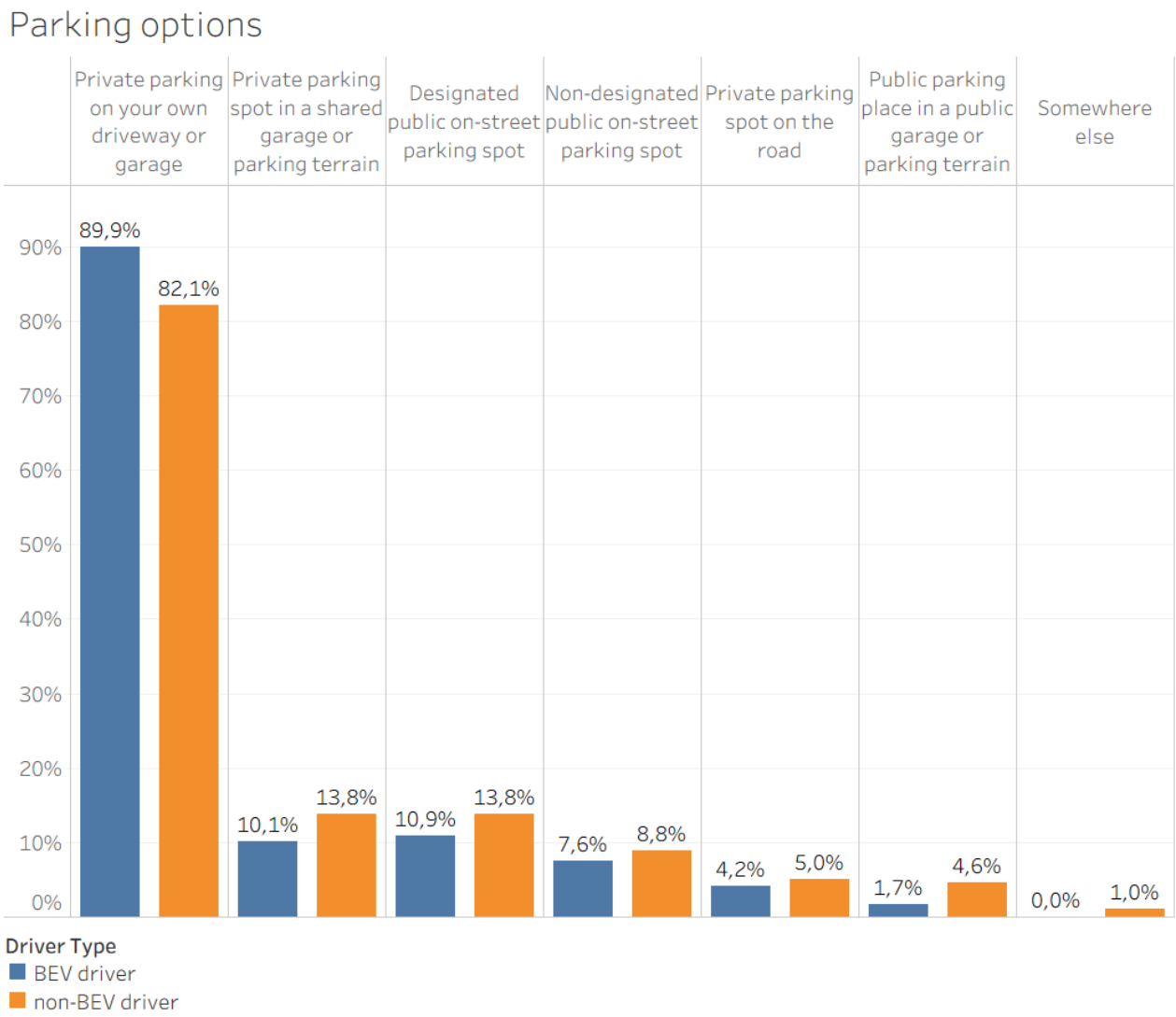
Figure 1: Socio-demographic results from the survey.



Source: EAFO Consumer Monitor and Survey 2026.

This last point is especially relevant as housing situation could influence parking and therefore also (potential) charging options. Not having access to private charging infrastructure like a wall-box could be a barrier for non-BEV drivers to make the transition. However, as demonstrated by Figure 2, parking options for BEV-drivers and non-BEV drivers are very similar, and a large majority of both groups have access to private parking in a garage or driveway. Even among drivers living in apartments almost 50% have access to this type of private parking.

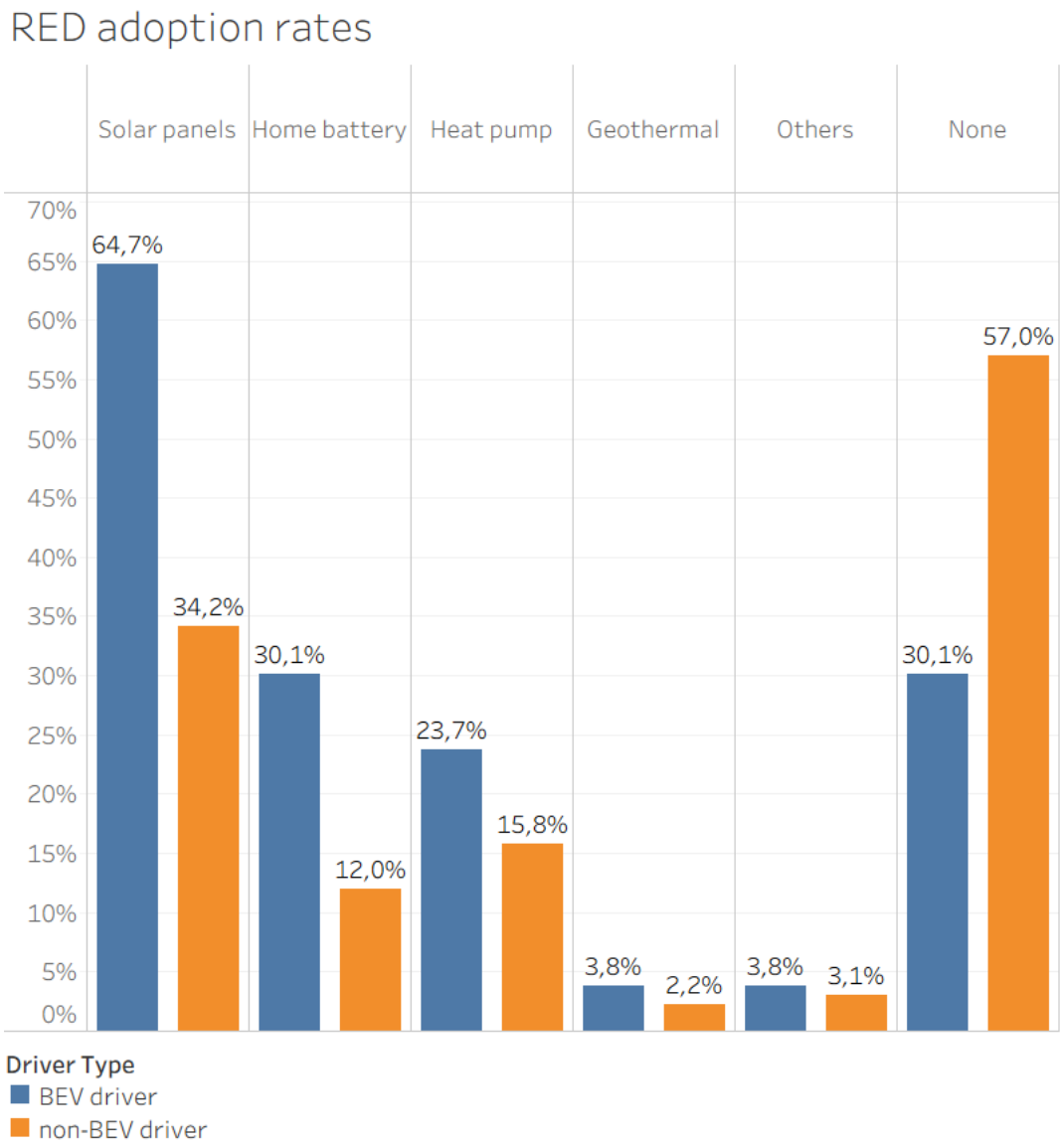
Figure 2: Luxembourgish drivers identified parking options (multiple answers were possible).



Source: EAFO Consumer Monitor and Survey 2026.

As similar as the parking options for BEV drivers and non-BEV drivers are, as different are their ownership rates of Renewable Energy Devices (REDs). In general, BEV drivers own REDs at more than 1,5 times the rate non-BEV drivers do. As shown in Figure 3, solar panels are relatively common in both groups, but they are much more popular among BEV drivers, with 64,7% being owners. Home batteries are the second most popular RED among BEV drivers (30,1%), for non-BEV drivers, heat pumps (23,7%) take the second spot.

Figure 3: Luxembourgish drivers' Renewable Energy Devices (RED) possession.



Source: EAFO Consumer Monitor and Survey 2026.

2.2 Attitude and motivation towards battery electric vehicles

Almost a quarter of non-BEV drivers state that they are familiar with BEV driving. 44,8% say they are not familiar and have little to no knowledge about the topic.

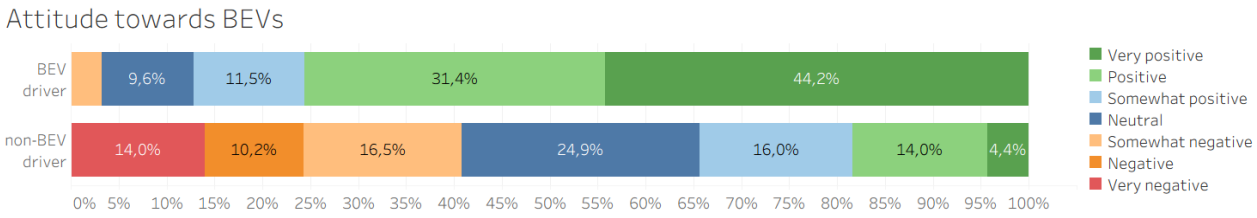
Table 1: Familiarity with BEVs among non-BEV drivers

Familiarity with BEVs among non-BEV drivers	
I own or lease a battery electric car	1,3%
Very familiar, I drive electric on a regular basis	3,5%
Very familiar, but I do not drive electric	10,4%
Familiar, I have a fair amount of knowledge about it	9,9%
A bit familiar, I know something about it	30,2%
Not familiar, I know very little to nothing about it	44,8%

Source: EAFO Consumer Monitor and Survey 2026.

Overall, 42,6% of all respondents are at least somewhat positive about BEVs in general, but this general attitude differs significantly between BEV drivers and non-BEV drivers, as can be seen in Figure 4. Unsurprisingly, BEV drivers are overwhelmingly positive. By contrast, the attitudes of non-BEV drivers span the entire spectrum, with the largest group expressing a neutral stance.

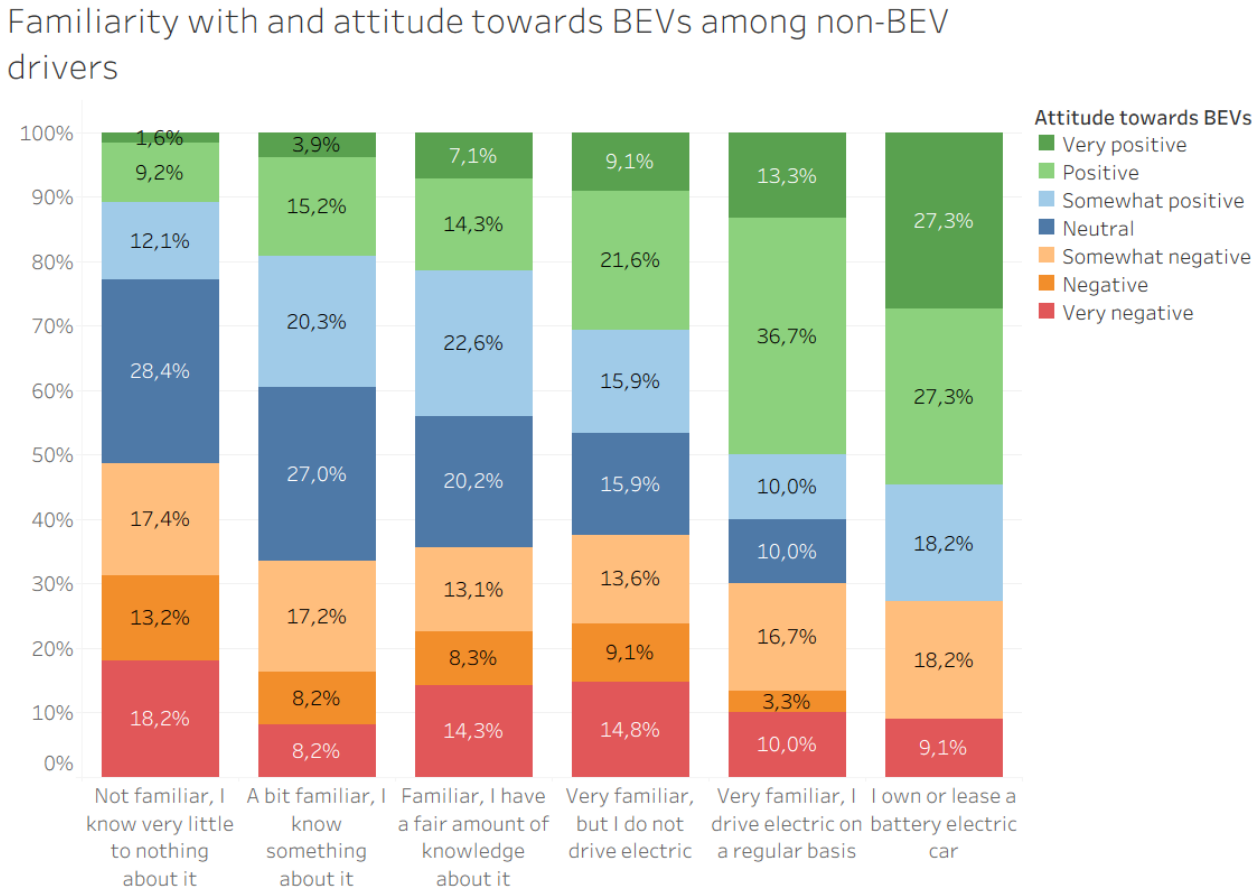
Figure 4: Luxembourgish drivers' attitude towards BEVs.



Source: EAFO Consumer Monitor and Survey 2026.

Among non-BEV drivers, there is a strong correlation between familiarity and positive attitude. A chi-square test on the data results in a p-value smaller than $2{,}2 * 10^{-16}$. This correlation is also illustrated by Figure 5. However, this figure should be interpreted carefully as not all levels of familiarity carry equal weight (see Table 1). The figure shows that those who are not familiar with BEVs are often negative or neutral towards BEVs, with only 22,9% being at least somewhat positive. On the other hand, for those who are very familiar but do not drive electric, this percentage doubles to 46,6%.

Figure 5: Luxembourgish non-BEV drivers' familiarity and attitude towards BEVs



Source: EAFO Consumer Monitor and Survey 2026.

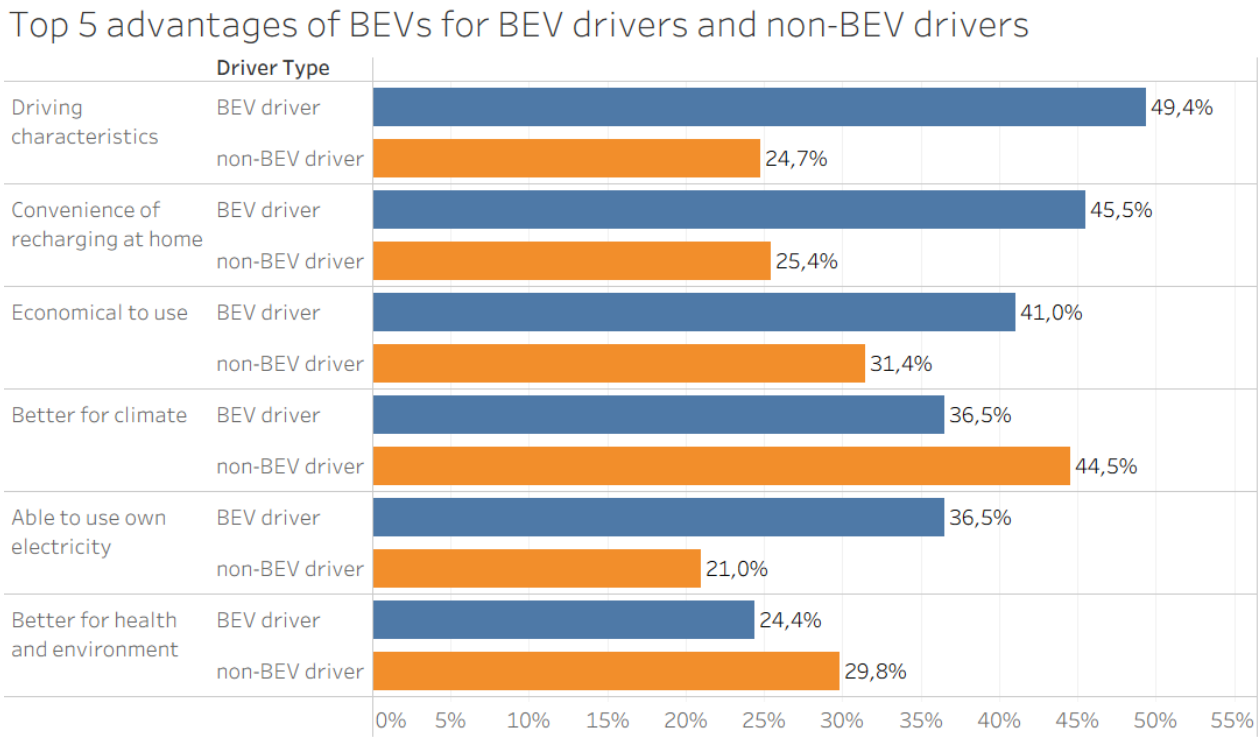
2.3 Main barriers and opportunities to adopt battery electric vehicles.

The Luxembourgish surveyed participants were asked to identify the most relevant advantages and disadvantages of driving battery electric vehicles. While BEV drivers and non-BEV drivers share three of the same top five advantages, the ranking of these advantages differs considerably between the two groups.

Among non-BEV drivers, the most frequently cited advantage by far is that BEVs are better for the climate (44,5%). In line with this environmental perspective, their third most selected advantage is that BEVs are better for human health and the environment (29,8%). Interestingly, these environmental benefits rank only fourth and sixth respectively among BEV drivers.

For BEV drivers, the most important advantage relates to BEV driving characteristics (49,4%), followed by the convenience of recharging at home (45,5%) and the fact that BEVs are economical to use (41,0%). This third advantage is second for non-BEV drivers.

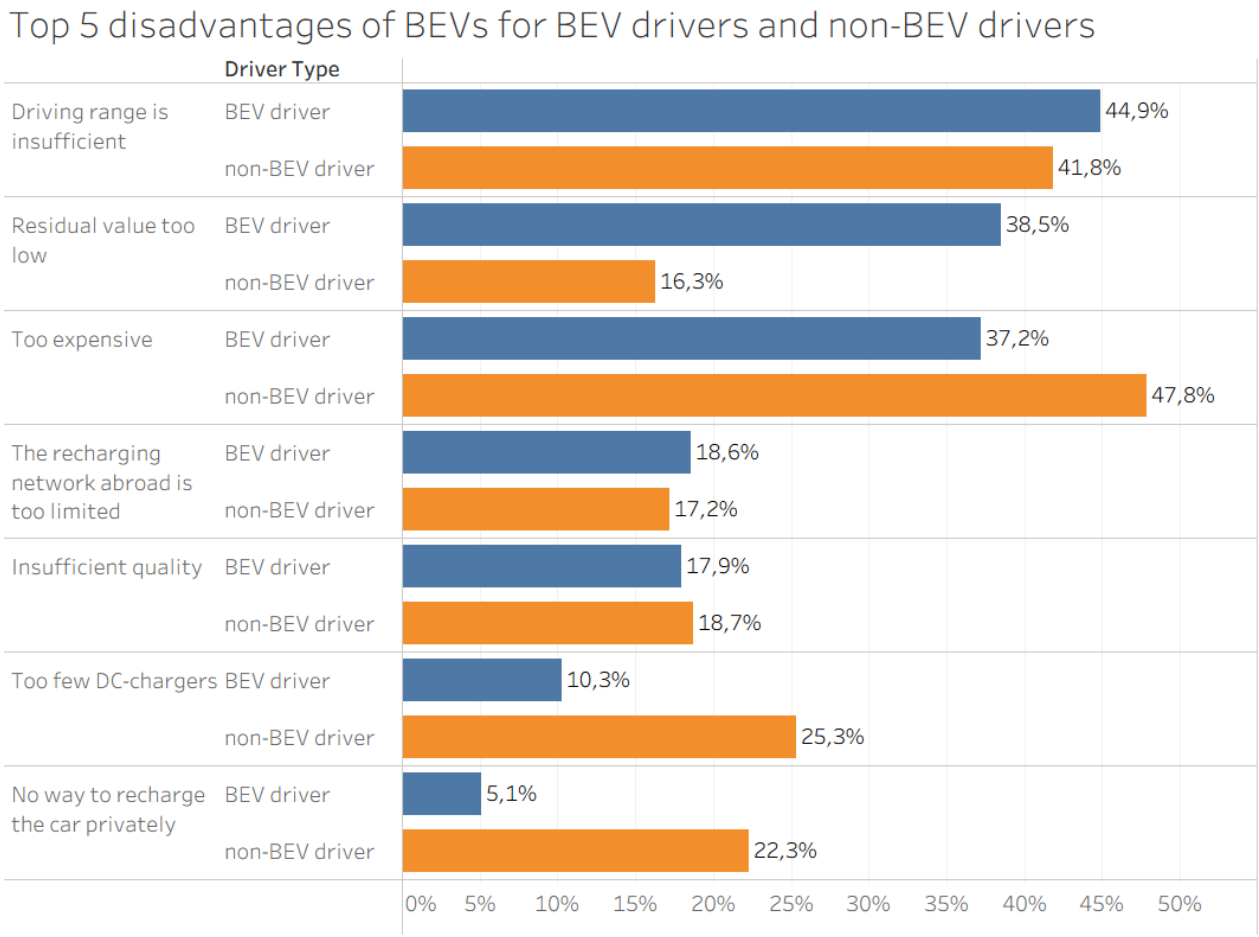
Figure 6: Luxembourgish drivers identified advantages of BEVs.



Source: EAFO Consumer Monitor and Survey 2026.

The top five perceived disadvantages again show a lot of overlap between groups of drivers. Among non-BEV drivers, there are two clear main disadvantages: BEVs are too expensive (47,8%), and they have an insufficient driving range (41,8%). Other disadvantages are reported by fewer than about 25% of respondents. A similar pattern is seen among BEV drivers, but here three main disadvantages can be observed. The limited driving range is considered the main disadvantage (44,9%), followed by the low residual value (38,5%) and only then by the high purchase price (37,2%). Other disadvantages are indicated by less than 20% of respondents.

Figure 7: Luxembourgish drivers identified disadvantages of BEVs.

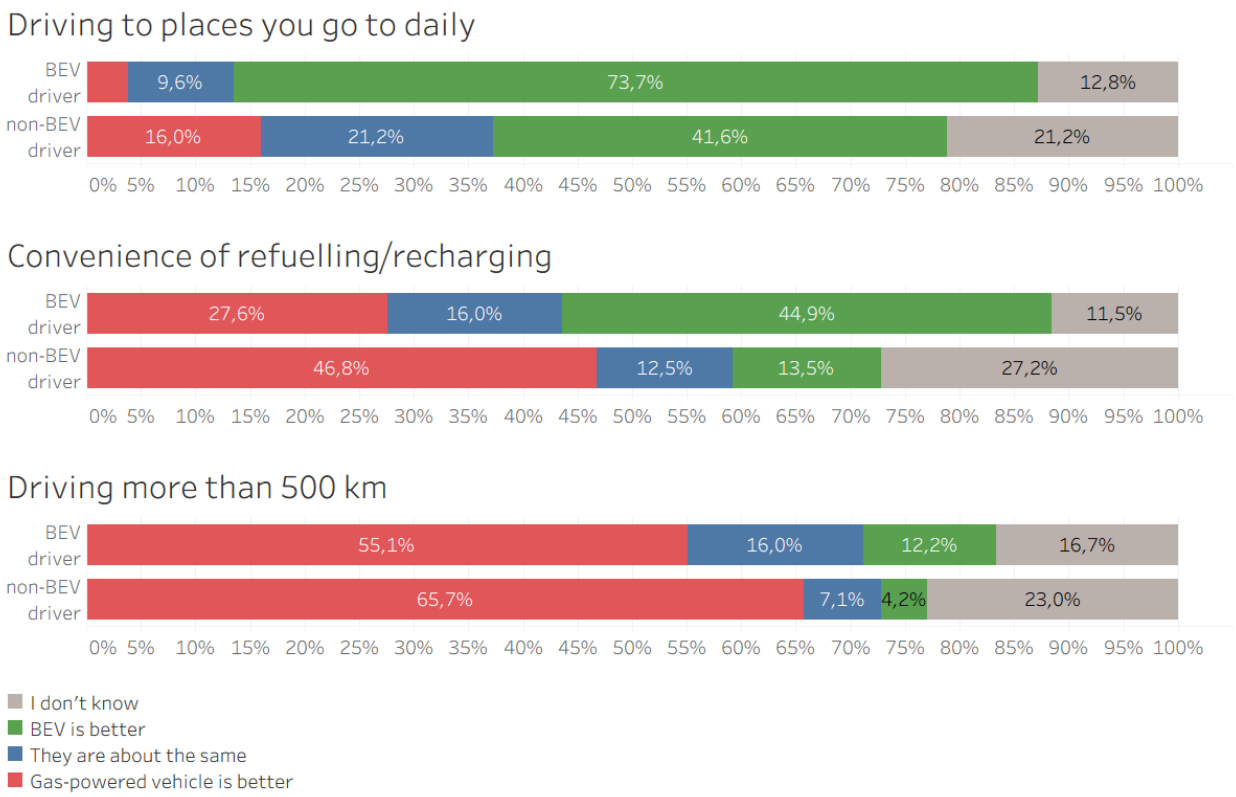


Source: EAFO Consumer Monitor and Survey 2026.

Respondents were also asked in which areas BEVs are better and in which ICEVs are superior. In total, nine aspects were given, which can be grouped into three categories: *convenience*, *costs* and *externalities*.

When it comes to *convenience*, BEVs are considered better for daily use, but worse for long distances by both BEV drivers and non-BEV drivers. On the other hand, their opinions about the convenience of refuelling/recharging are opposite. 44,9% of BEV drivers think recharging an electric car is more convenient, while 46,8% of non-BEV drivers think refuelling an ICEV is easier.

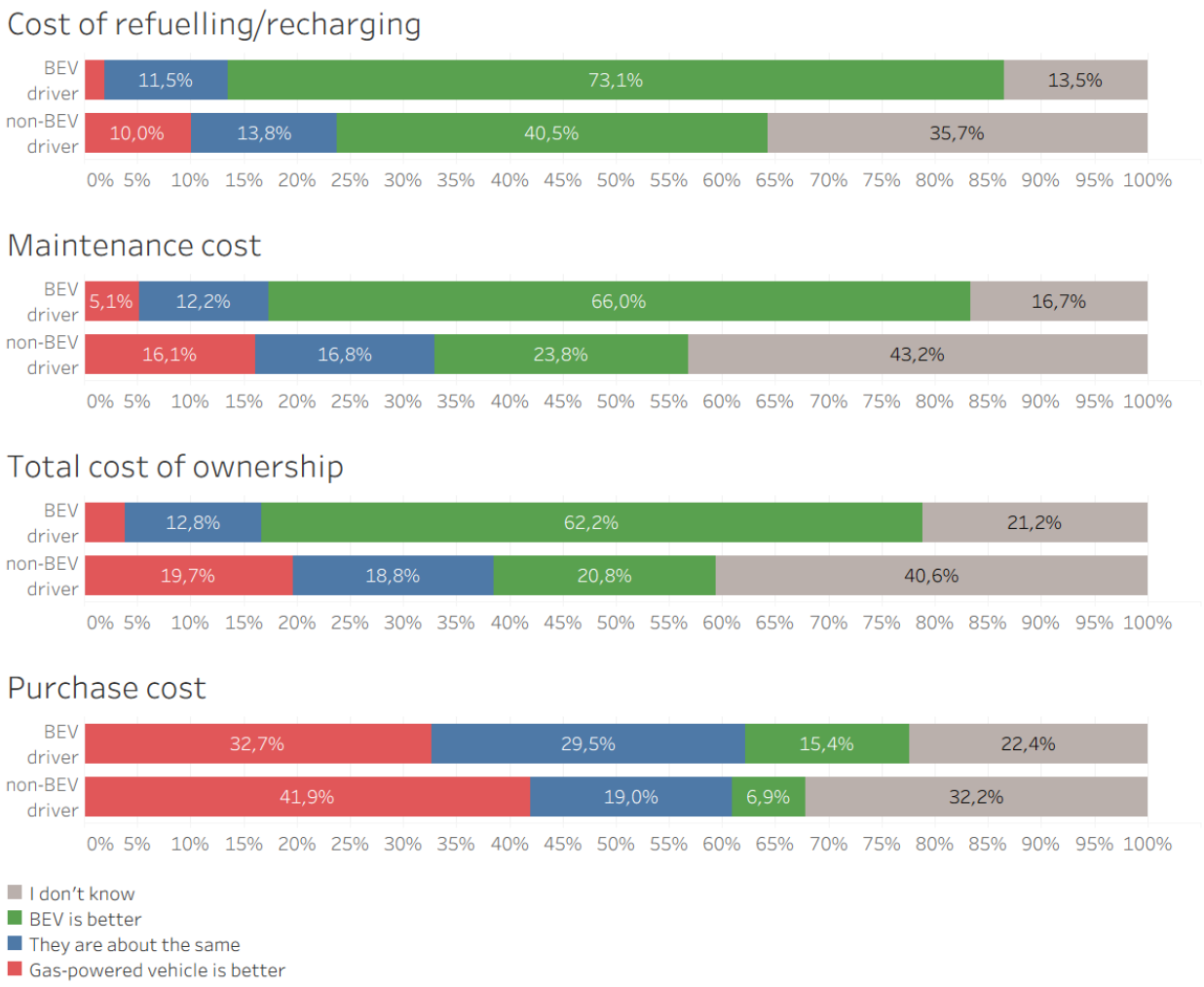
Figure 8: Luxembourgish drivers' opinions and views on BEVs vs ICEVs.



Source: EAFO Consumer Monitor and Survey 2026.

Cost-wise, BEVs vastly outperform ICEVs according to BEV drivers in every metric except for purchase cost. A similar pattern is seen among non-BEV drivers, with BEVs being characterised as better rather than worse more often, albeit with smaller margins. When comparing to the questions about convenience, there is much more uncertainty about costs, especially among non-BEV drivers. For every cost-related question, more than 30% of non-BEV drivers selected 'I don't know', with uncertainty peaking at 43,2% for maintenance costs.

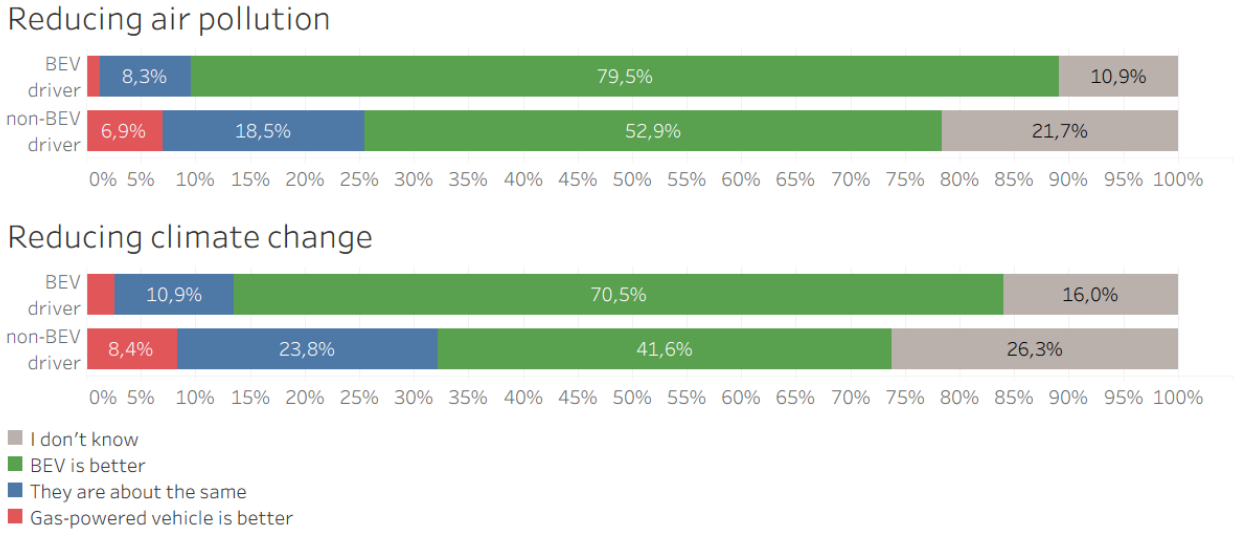
Figure 9: Luxembourgish drivers' opinions and views on BEVs vs ICEVs.



Source: EAFO Consumer Monitor and Survey 2026.

In terms of *externalities*, BEVs are considered superior to non-BEVs by all drivers. Most drivers say BEVs reduce air pollution and 41,6% of non-BEV drivers state that BEVs reduce climate change compared to ICEVs.

Figure 10: Luxembourgish drivers' opinions and views on BEVs vs ICEVs.

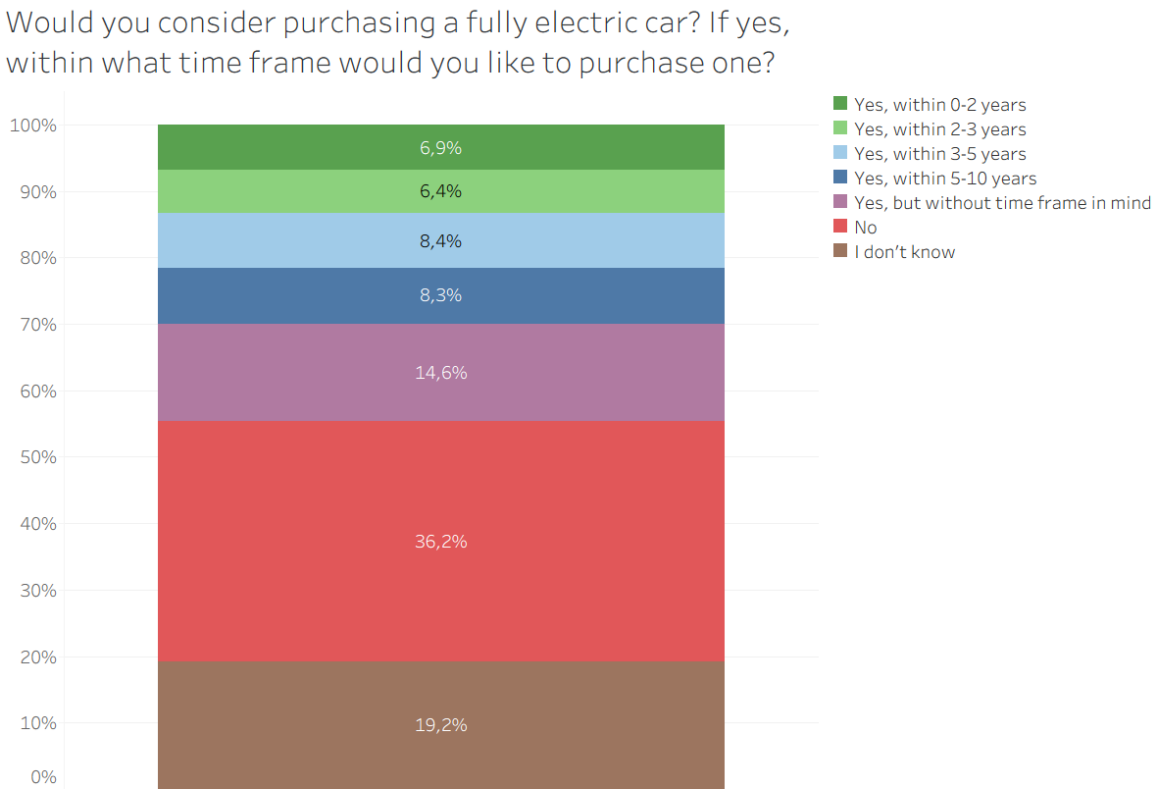


Source: EAFO Consumer Monitor and Survey 2026.

2.4 Time frame to buy a battery electric vehicle in Luxembourg.

Among the respondents who do not yet own a BEV and intend to buy a car in the future, 36,2% do not consider an EV as an option. Together with 19,2% of the non-BEV drivers who do not know yet whether they want a BEV in the future, this forms more than half of the respondents who do not see a pathway to a BEV.

Figure 11: Luxembourgish drivers' timeframe to buy a battery electric vehicle.



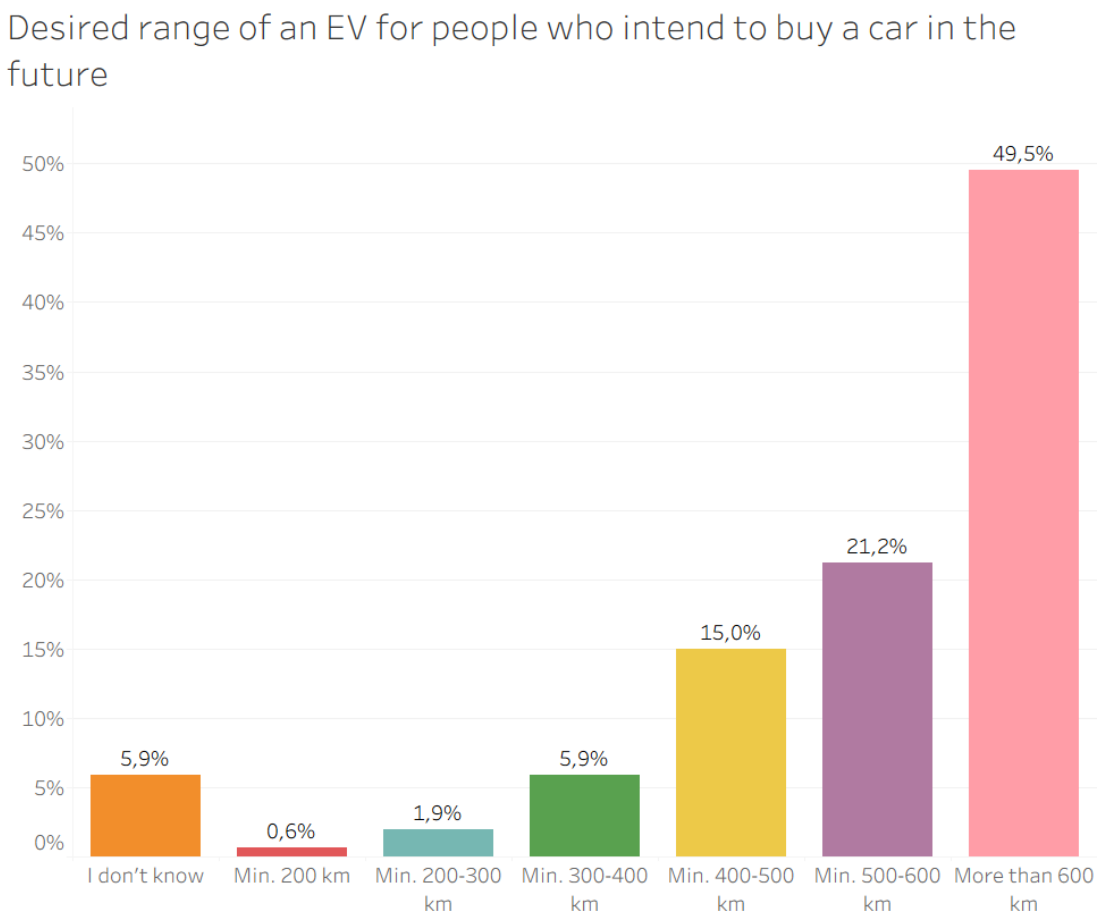
Source: EAFO Consumer Monitor and Survey 2026.

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

After removing outliers using the Tukey rule (i.e. datapoints are considered outliers if they fall 1,5 times the interquartile range (Q3-Q1) below the first quartile (Q1) or above the third quartile (Q3)), the median price that all Luxembourgish respondents are willing to pay for a new or used ICEV is the same as for a new or used BEV at €30.000 Only 23,3% of BEV drivers in the survey bought their car in the price range of € 30.000 to € 40.000. Furthermore, over half of the BEV drivers paid more than € 40.000, which could indicate a discrepancy between the willingness to pay and market prices. This is further evidenced by the consumer's desired driving range of BEVs.

In the EAFO consumer monitor survey, the desired range was described as *'the number of kilometres that can be driven with a full battery without recharging'*. Over 85% of respondents would want their BEV to have a minimum range of 400 km and almost half of the respondents indicated at least a 600 km range.

Figure 12: Luxembourgish drivers' desired range of a battery electric vehicle.



Source: EAFO Consumer Monitor and Survey 2026.

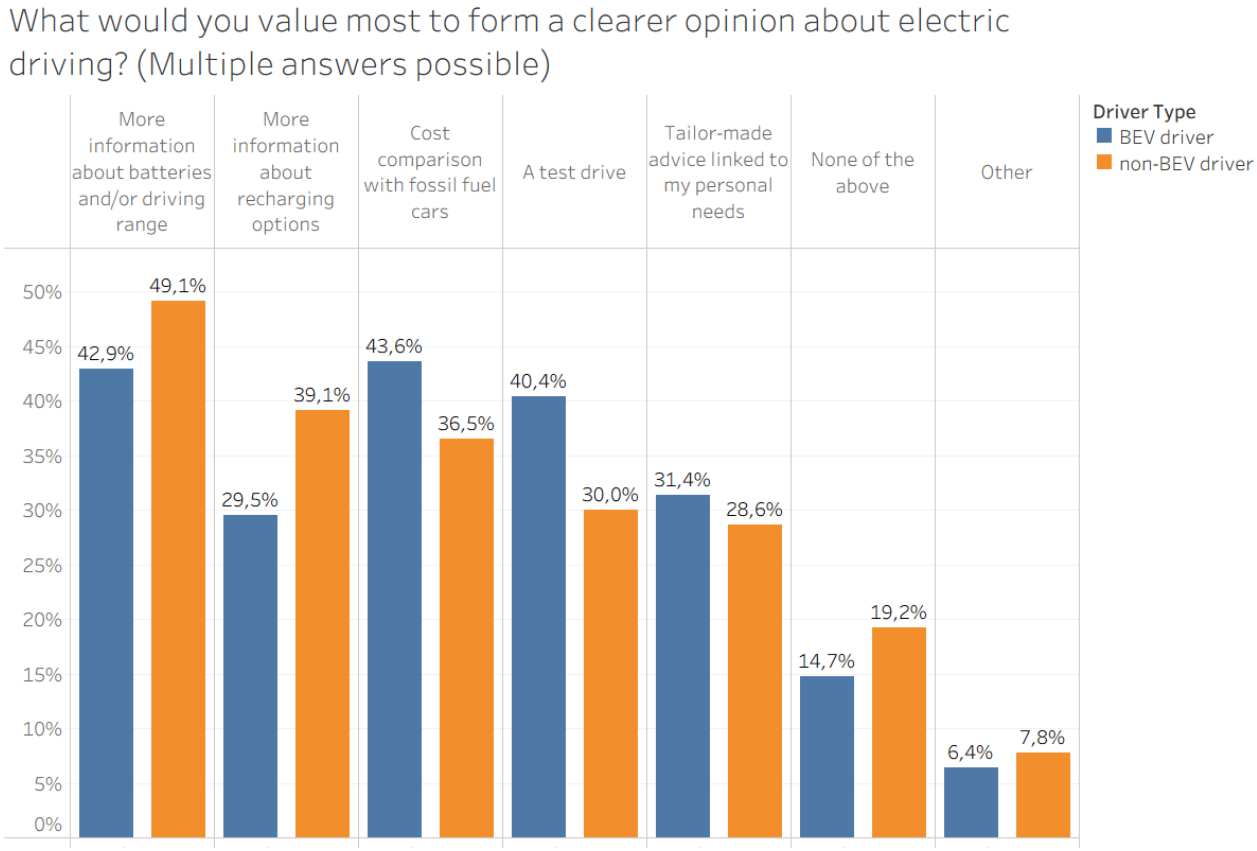
The current European BEV market offers a wide variety of models with over 600 vehicles providing a driving range between 135 km and 720 km. However, affordable options remain relatively limited: only around 71 models cost less than € 35.000 and of those only 23 have a range of at least 300 km. At the same time, only 1,9% of respondents in this survey would be satisfied with a range below 300 km, while the median willingness to pay is €30.000. Furthermore, only 14 models currently offer a driving range exceeding 600km, which corresponds to the preferred range indicated by most respondents. These vehicles are predominantly premium models, with 10 of them being priced around or above €100.000 and with the most affordable one costing around €60.000. This indicates a clear mismatch between the respondents' expectations and the reality of the BEV market.[12]

2.6 Support and governmental incentives to drive a BEV.

Luxembourgish drivers were asked about what they would value most to have a clearer opinion about electric driving. This is especially relevant as a large number of drivers has little to no knowledge on electric driving (Section 2.2). More information about batteries and/or driving range, more information about recharging options and a cost comparison with fossil fuel were the most relevant support measures.

[12] All data on BEV models was sourced from https://ev-database.org/ on 03/06/2026. A BEV model was considered 'available' on the European market if it was available in either the Netherlands or Germany. Furthermore, prices in this section are also based on prices in these two countries.

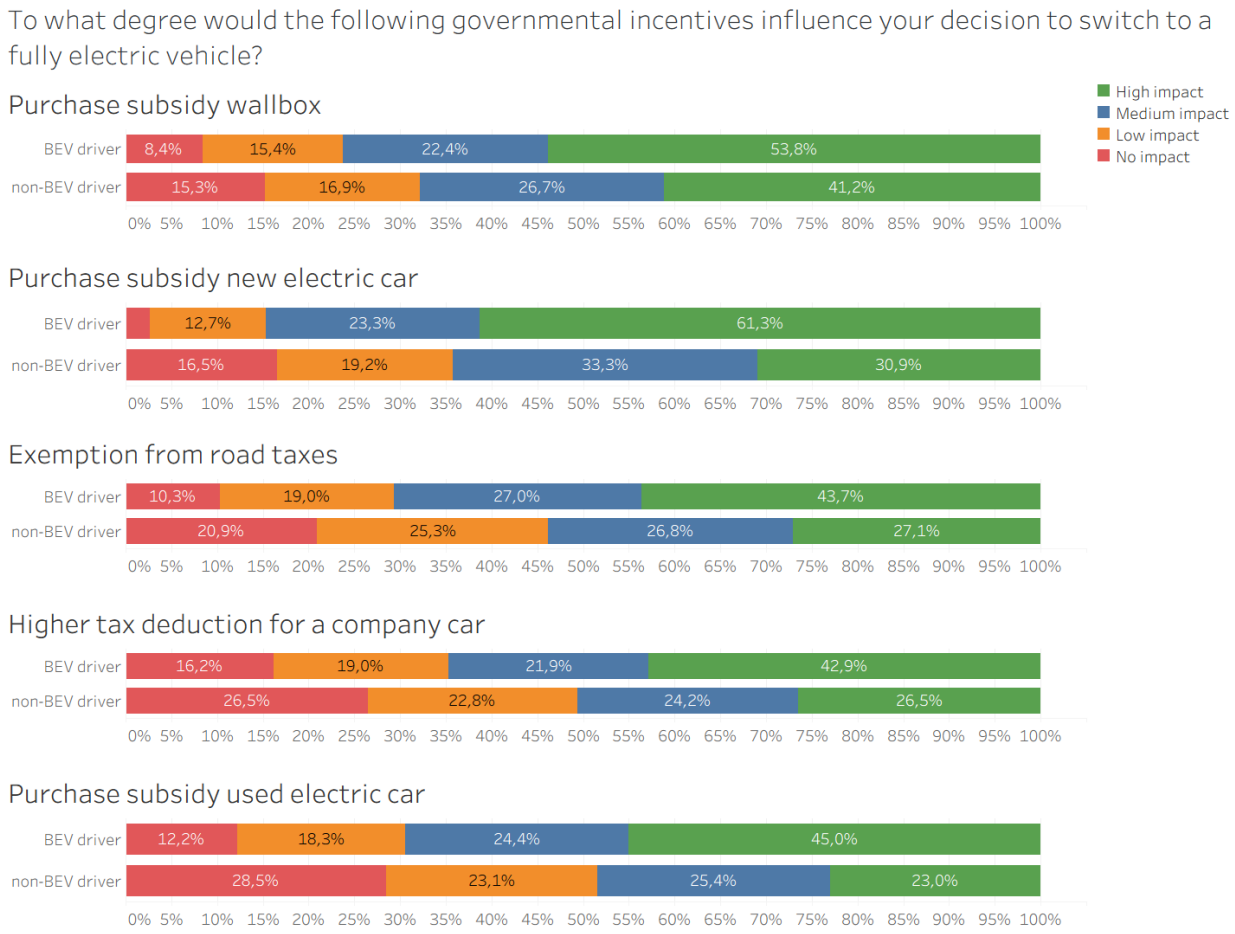
Figure 13: Factors valued most for forming an opinion on battery electric vehicles according to Luxembourgish drivers.



Source: EAFO Consumer Monitor and Survey 2026.

The survey also gauged the impact of incentives/subsidies on people's decision to switch to a fully electric car. All proposed subsidies would have a medium to high impact on at least about half of the drivers, with a wallbox subsidy and a purchase subsidy for a new electric car being the most impactful. The pattern for BEV and non-BEV drivers is similar; however, the impact of these incentives is reportedly higher on BEV drivers.

Figure 14: Impact of governmental incentives on Luxembourgish drivers' decision to drive a full battery electric vehicle.



Source: EAFO Consumer Monitor and Survey 2026.

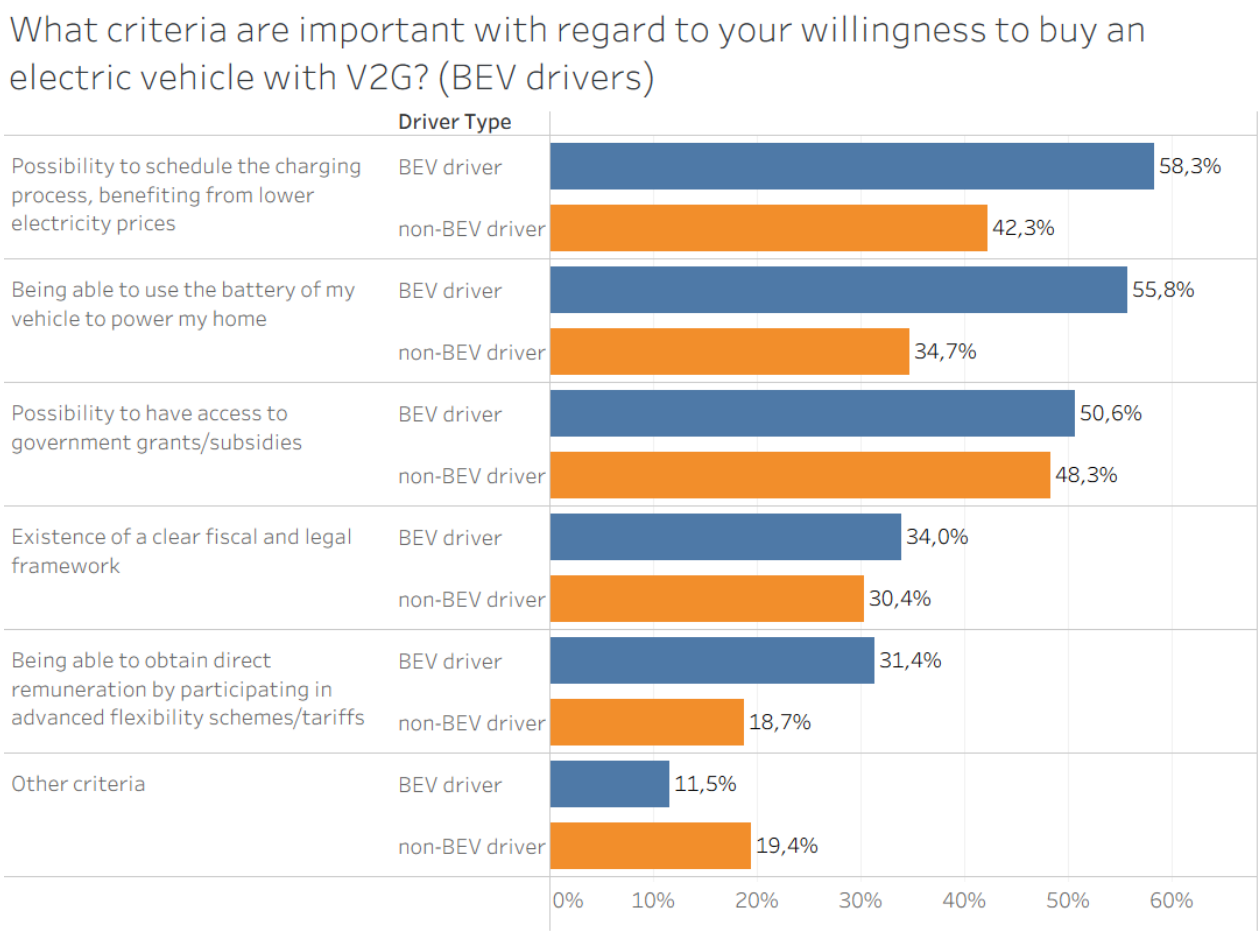
2.7 Future trends: Luxembourgish BEV drivers, awareness and interest in vehicle-to-grid capable vehicles

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.

Luxembourgish drivers were asked if they were aware of this technology. Among BEV drivers, 55,8% had never heard of it, while 21,2% indicated being aware and having knowledge about this. Non-BEV drivers appeared to be a lot less aware, with 82,6% never having heard of the technology and only 3,9% having knowledge about it. Moreover, 46,8% of Luxembourgish BEV and 25,32% of non-BEV drivers indicated that they are interested in buying a vehicle with the V2G functionality.

BEV drivers and non-BEV drivers also gave criteria to eventually buy such a vehicle. Having access to government grants or subsidies is the most important criterion for non-BEV drivers. For BEV drivers, being able to schedule charging to benefit from lower electricity prices is the number one criterion.

Figure 15: Important criteria related to the willingness to buy a V2G-capable BEV.



Source: EAFO Consumer Monitor and Survey 2026.

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

This section focuses on the 156 Luxembourgish BEV drivers only (156 valid responses in total, see Annex I for the definition of 'BEV driver'). It gives an insight into who the Luxembourgish BEV drivers are, their mobility behaviour, purchase costs of BEVs and range expectation towards BEVs.

3.1 Mobility behaviour and vehicle ownership of battery electric drivers in Luxembourg

96,8% of the surveyed Luxembourgish BEV drivers use their vehicle several times a week or daily. Most BEV drivers (i.e. people with a BEV) have driven a BEV for less than 3 years. They mostly own new electric cars and mainly use them for work, but also frequently for leisure activities.

Table 2: BEV ownership and usage in Luxembourg

BEV driver behaviour	Value
< 1 year to 3 years as BEV driver	53,2%
3 years to 5 years or longer as BEV driver	44,9%
km driven per year (median)	15 000
km driven per day (median)	50
BEV drivers using their vehicle daily or several times a week	96,8%
Main activity when driving their BEV	For shopping/errands (e.g., shopping, bringing and picking up the children, doctor visits, care of family members, administration)
BEV ownership	
Leased BEV (business)	1,3%
Leased BEV (private)	25,6%
BEV company car (if employee)	3,8%
Privately owned BEV	69,2%
New vs. second-hand BEVs	
New BEV	90,4%
Second-hand BEV	9,6%

Source: EAFO Consumer Monitor and Survey 2026.

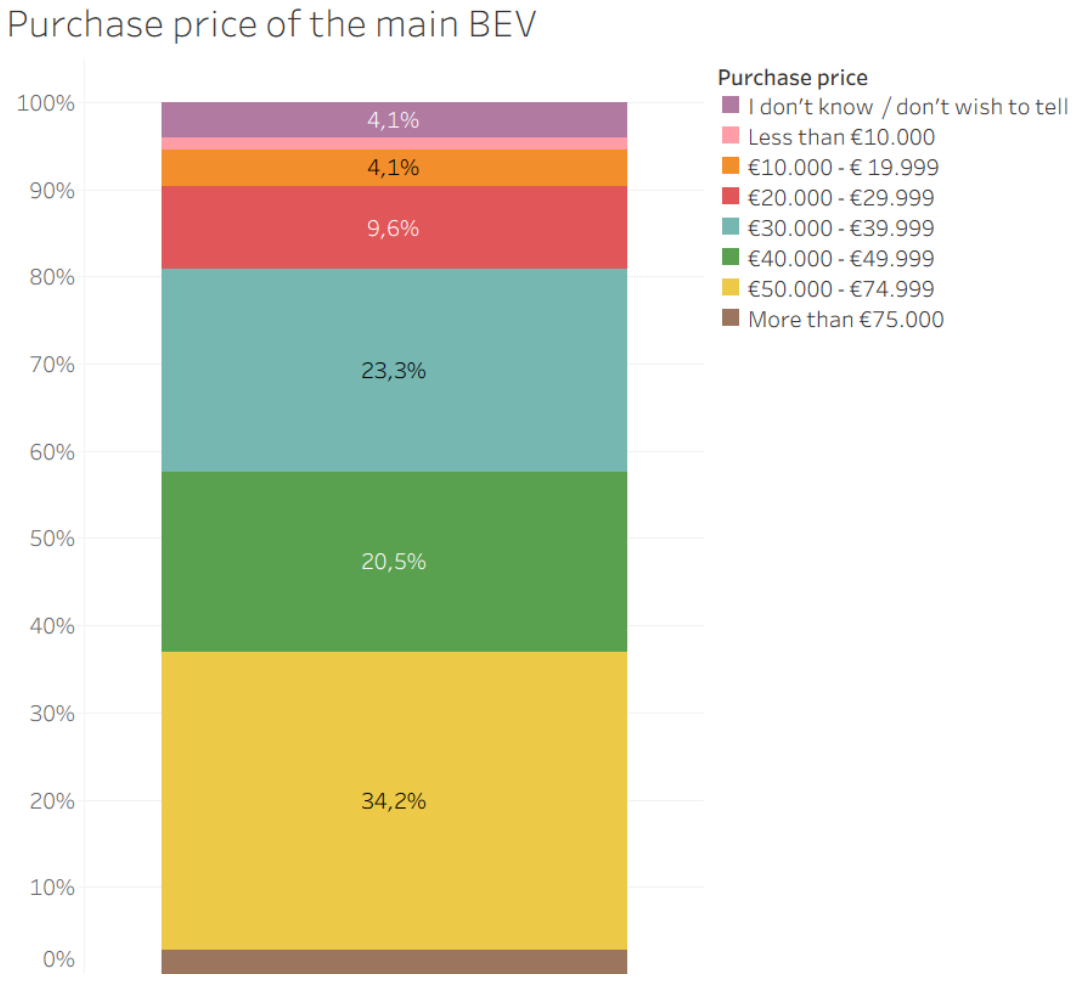
"Company car" refers to a vehicle made available by an employer (regardless of whether it is owned or leased by the employer), while "business lease" refers to a lease contract in a company's name (e.g., self-employed/SME), typically structured as full service operational leasing. In Luxembourg, zero emission company cars benefit from a favourable framework, including fiscal incentives (e.g., expenses related to the purchase, maintenance and use of BEVs as company cars being 100% tax

deductible until 2026).[13] Despite this, only 3,8% of respondents in this resident survey report having a company car. This proportion may differ from registration-based statistics (e.g., company cars accounting for half of new registrations in 2025)[14], because the survey covers Luxembourg residents only, whereas company cars registered in Luxembourg can also be assigned to non-resident employees.[15]

3.2 Purchase and lease price paid by BEV drivers in Luxembourg.

Among BEV drivers who privately own their vehicle, the largest group (34,2%) reported spending between € 50,000 and € 75,000 on their car. This relatively high price range can largely be explained by the generally higher purchase price of BEVs, as well as the fact that the vast majority of these vehicles were bought new.

Figure 16: Luxembourgish BEV drivers purchase price for their battery electric vehicle.



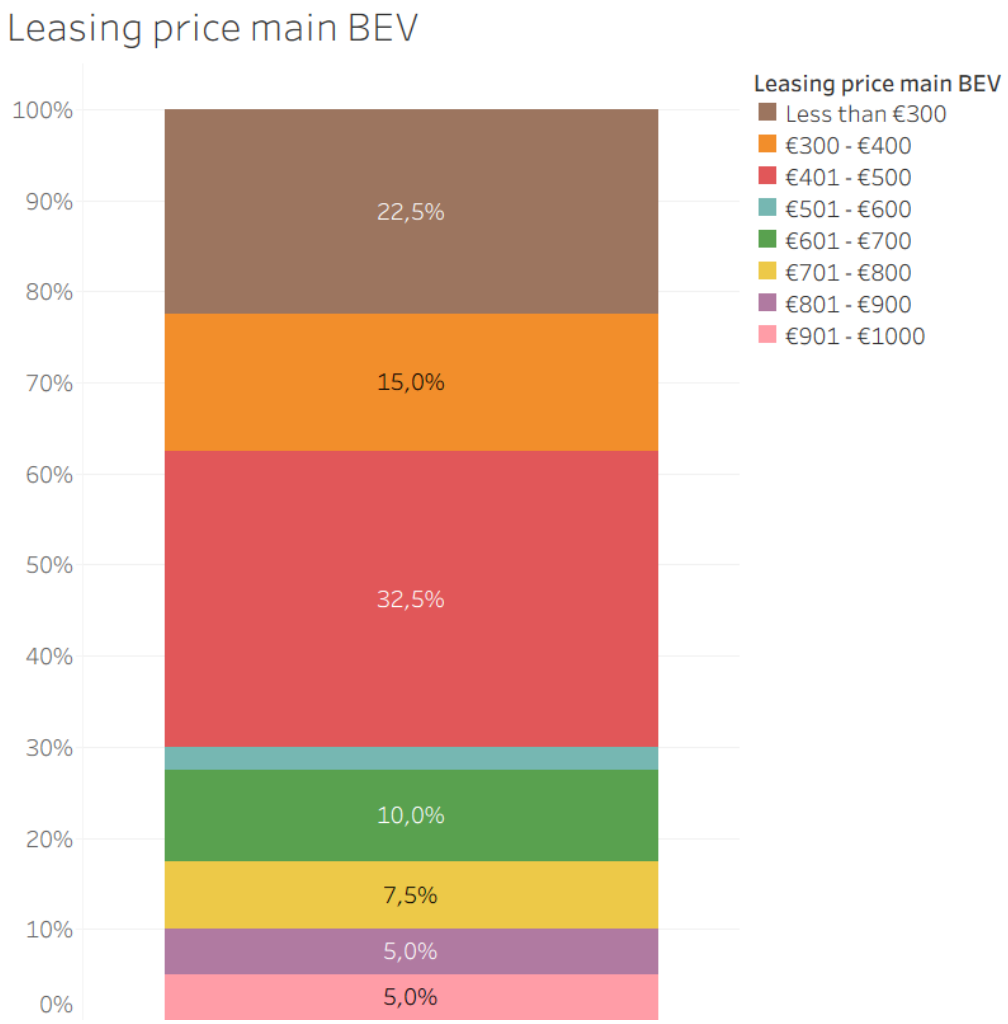
Source: EAFO Consumer Monitor and Survey 2026.

3.3 Leasing Price

Leasing costs show a different pattern, with considerably fewer respondents in the higher price categories. The largest group of BEV drivers who lease their vehicle pays between €400 and €500 per month, while 22,5% report monthly leasing costs below €300.

[13] https://alternative-fuels-observatory.ec.europa.eu/transport-mode/road/luxembourg/incentives-legislations
[14] https://autotouring.acl.lu/en/we-must-save-the-company-car/
[15] https://guichet.public.lu/en/citoyens/fiscalite/transport/proprietaire-vehicule/leasing.html#accordionItem-accordionitem_services_en_ligne_et_formulaires

Figure 17: Luxembourgish BEV drivers' lease price for their battery electric vehicle.

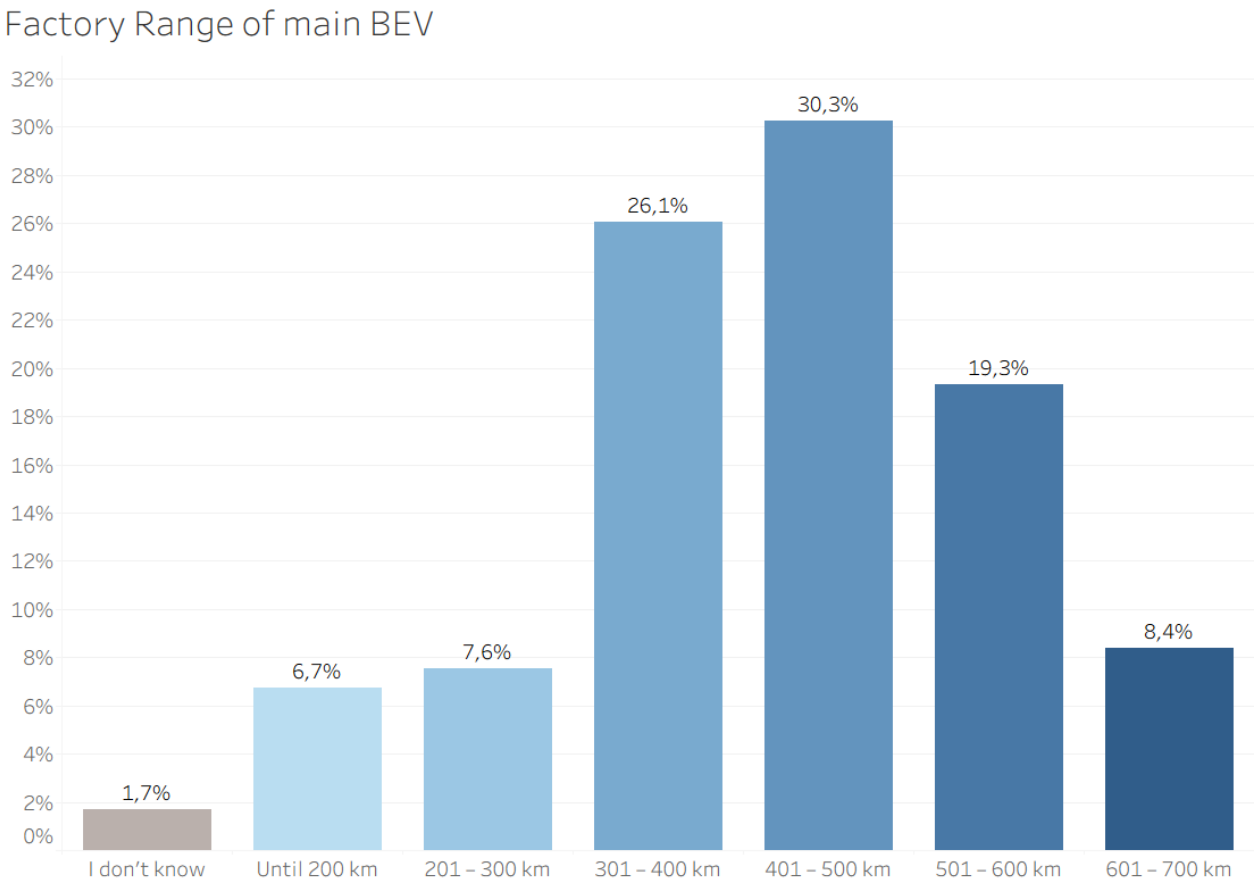


Source: EAFO Consumer Monitor and Survey 2026.

3.4 Factory range and range satisfaction of fully electric cars used by BEV drivers in Luxembourg.

Factory range refers to the number of kilometres a new BEV can drive with the available vehicle battery after running a World Harmonised Light Vehicle Test Procedure (WLTP) test cycle. More than half of the respondents have a battery range between 300 km and 500 km.

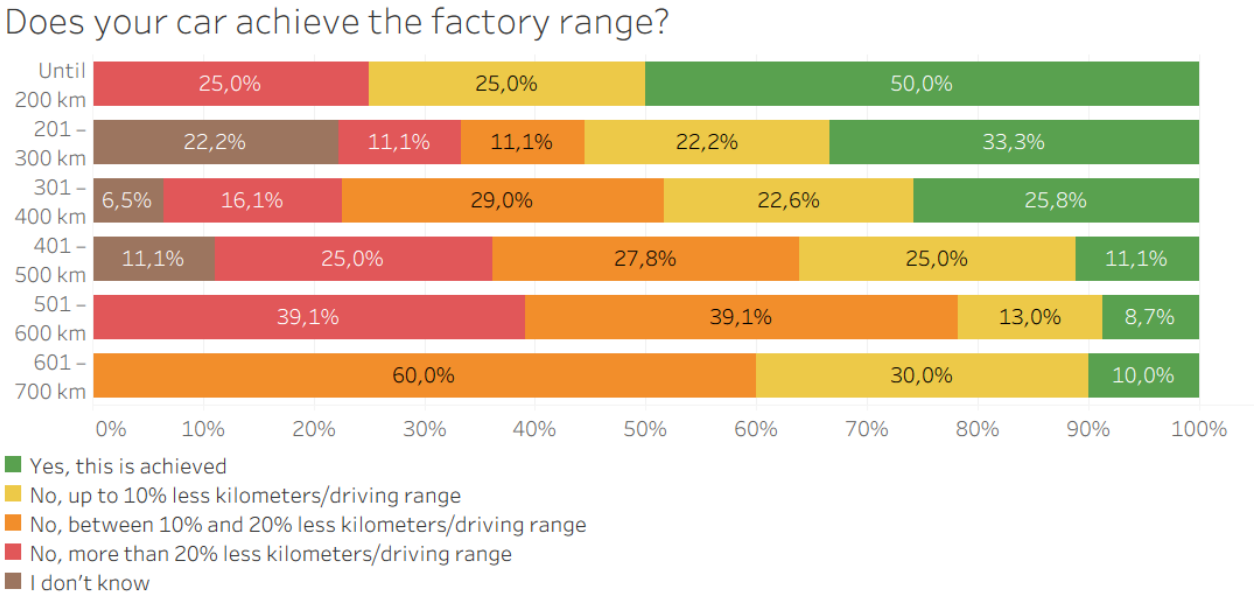
Figure 18: BEV factory range according to Luxembourgish BEV drivers.



Source: EAFO Consumer Monitor and Survey 2026.

Most of the driver's report, however, that this range in practice is not achieved. This is especially true for higher-range vehicles.

Figure 19: BEV factory range and achieved range according to Luxembourgish drivers.

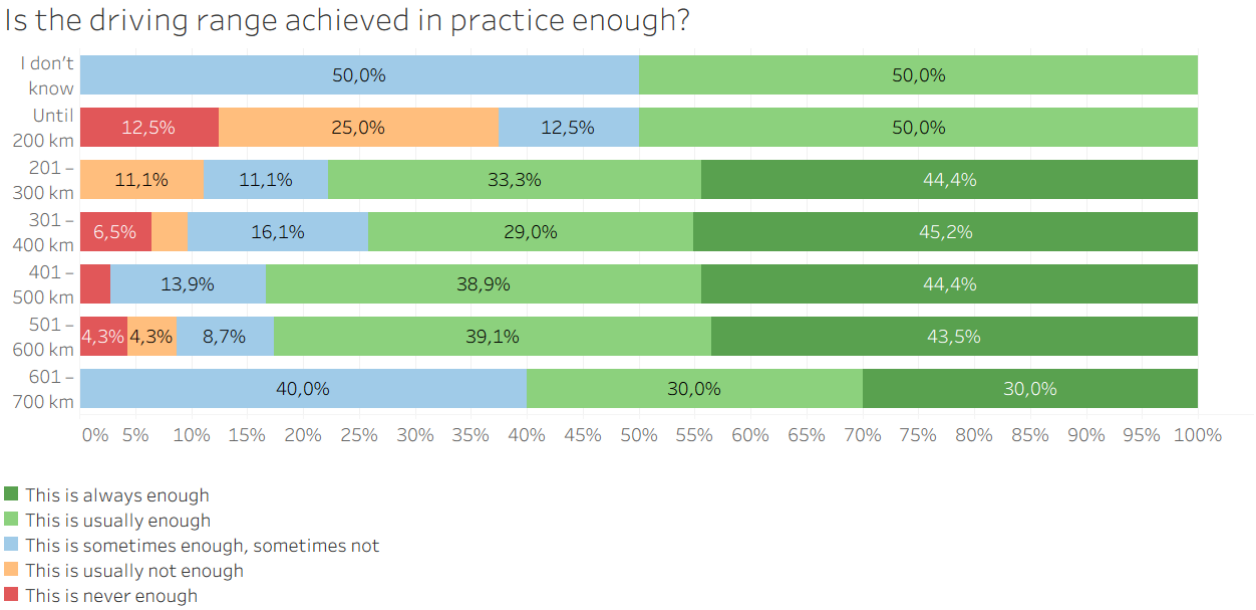


Source: EAFO Consumer Monitor and Survey 2026.

Despite this discrepancy between the factory range and the achieved range, most drivers are satisfied with the range of their vehicle. Almost 45% of owners of cars with a factory range between

200 km and 600 km, the vast majority of BEV drivers, report that the achieved range is always enough. Over three-quarters of that same group experience that the range is usually enough.

Figure 20: Factory range and range satisfaction according to Luxembourgish BEV drivers.

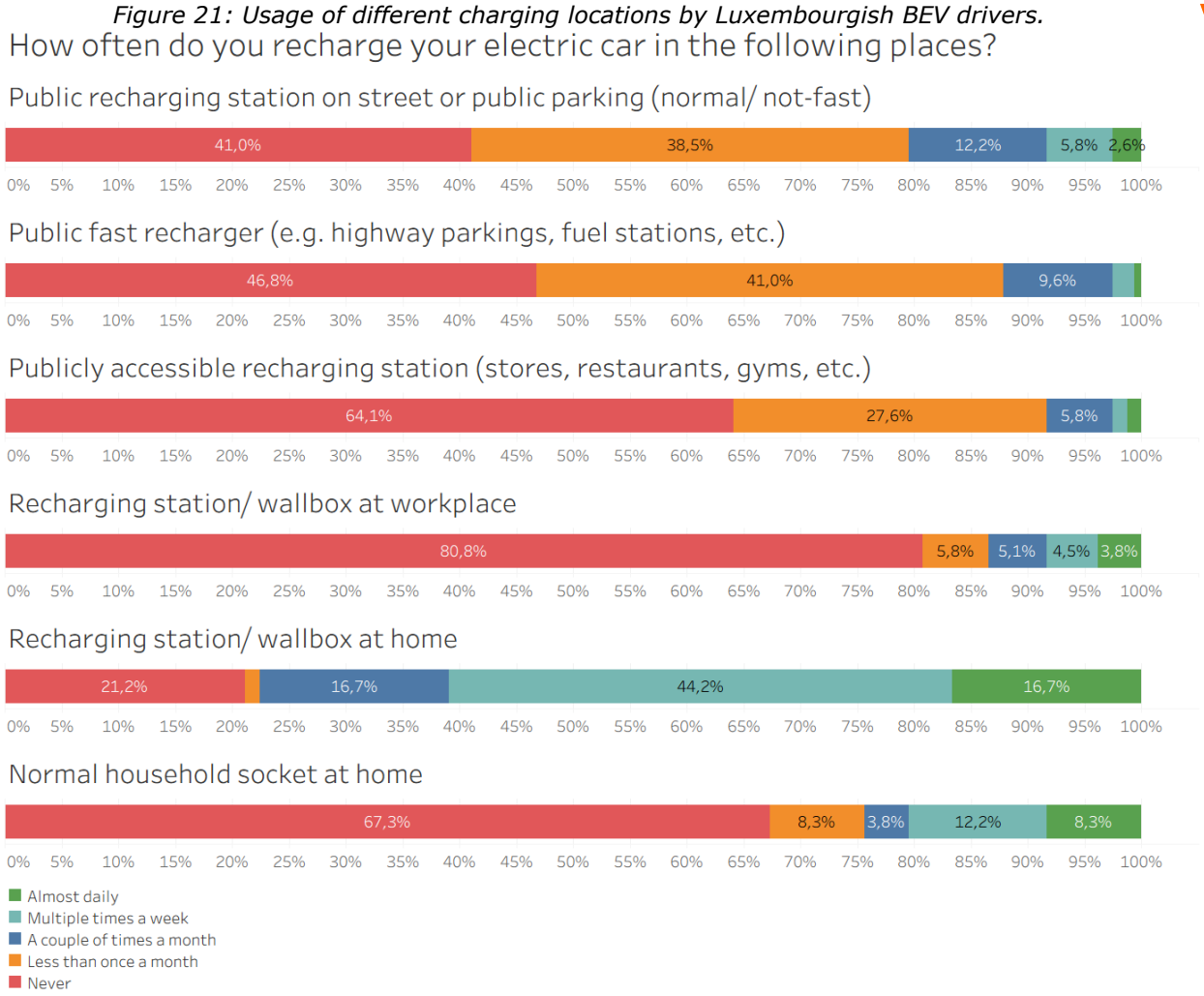


Source: EAFO Consumer Monitor and Survey 2026.

3.5 Recharging in Luxembourg

The most popular way of recharging among Luxembourgish BEV drivers is with a recharging station at home. Over 60% of drivers use this method multiple times a week or almost daily. For publicly accessible regular charging stations, this number drops to only 8,4%, with almost 80% of drivers using these facilities less than once a month or even never.

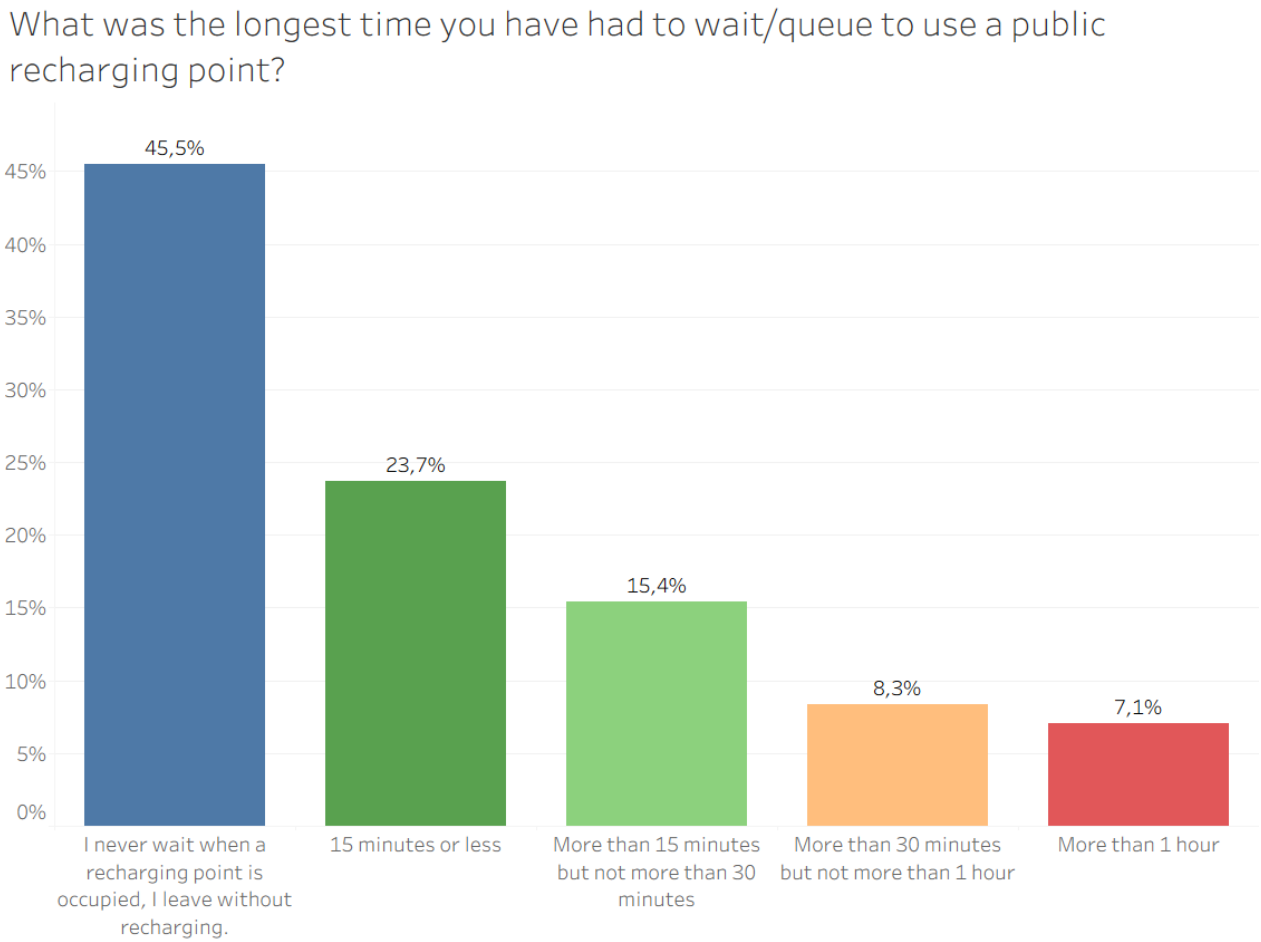
Figure 21: Usage of different charging locations by Luxembourgish BEV drivers.



Source: EAFO Consumer Monitor and Survey 2026.

One disadvantage of public chargers could be waiting times. Surveyed Luxembourgish BEV drivers were asked what the longest waiting time was to use a public recharging point. Almost half of BEV drivers never wait when a recharging point is occupied and leave without recharging. Meanwhile, 23,7% of drivers who sometimes wait have never waited longer than 15 minutes, and 7,1% have waited more than an hour.

Figure 22: Maximum waiting times at public recharging points according to BEV drivers.

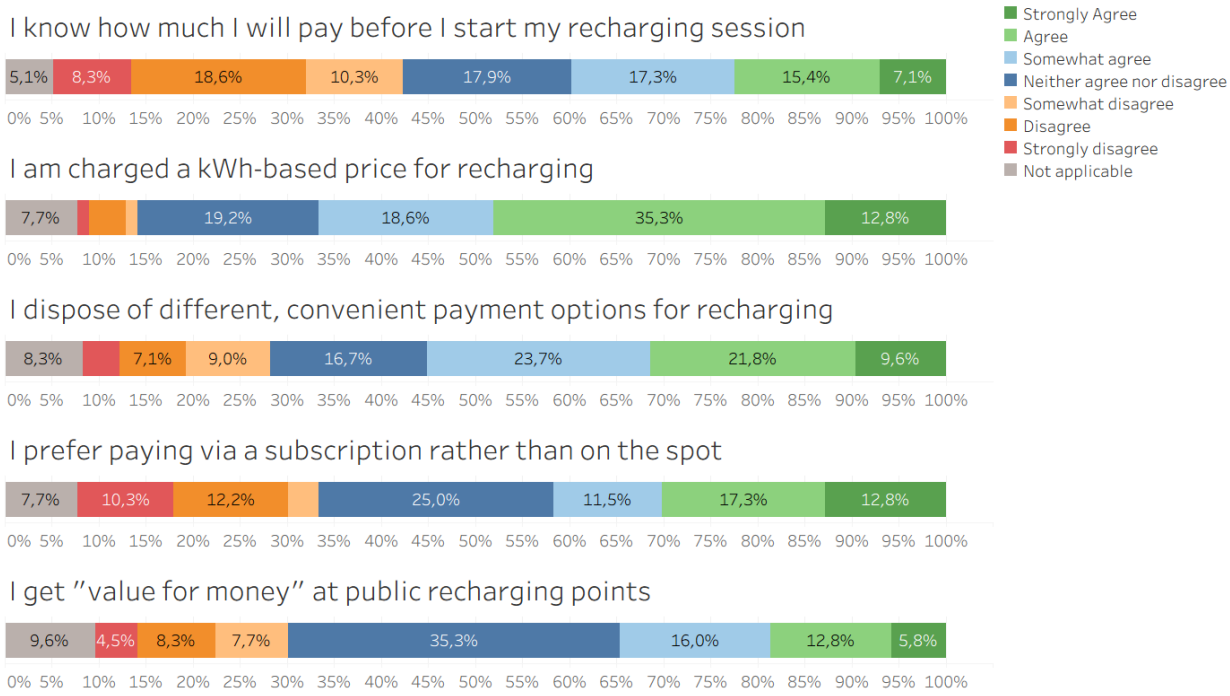


Source: EAFO Consumer Monitor and Survey 2026.

Further questions about public chargers reveal that the convenience of charging at public AC chargers is somewhat limited by factors other than waiting time. Only 39,8% somewhat agree that they know how much they will pay before a charging session, possibly indicating a lack of price transparency (see Figure 23). A similar pattern is observed when the participants were asked if they get 'value for money' at public recharging stations (34,6% at least somewhat agree). Furthermore, 22,5% of BEV drivers mostly disagree that they have enough choice between different charging station operators, as can be seen in Figure 24.

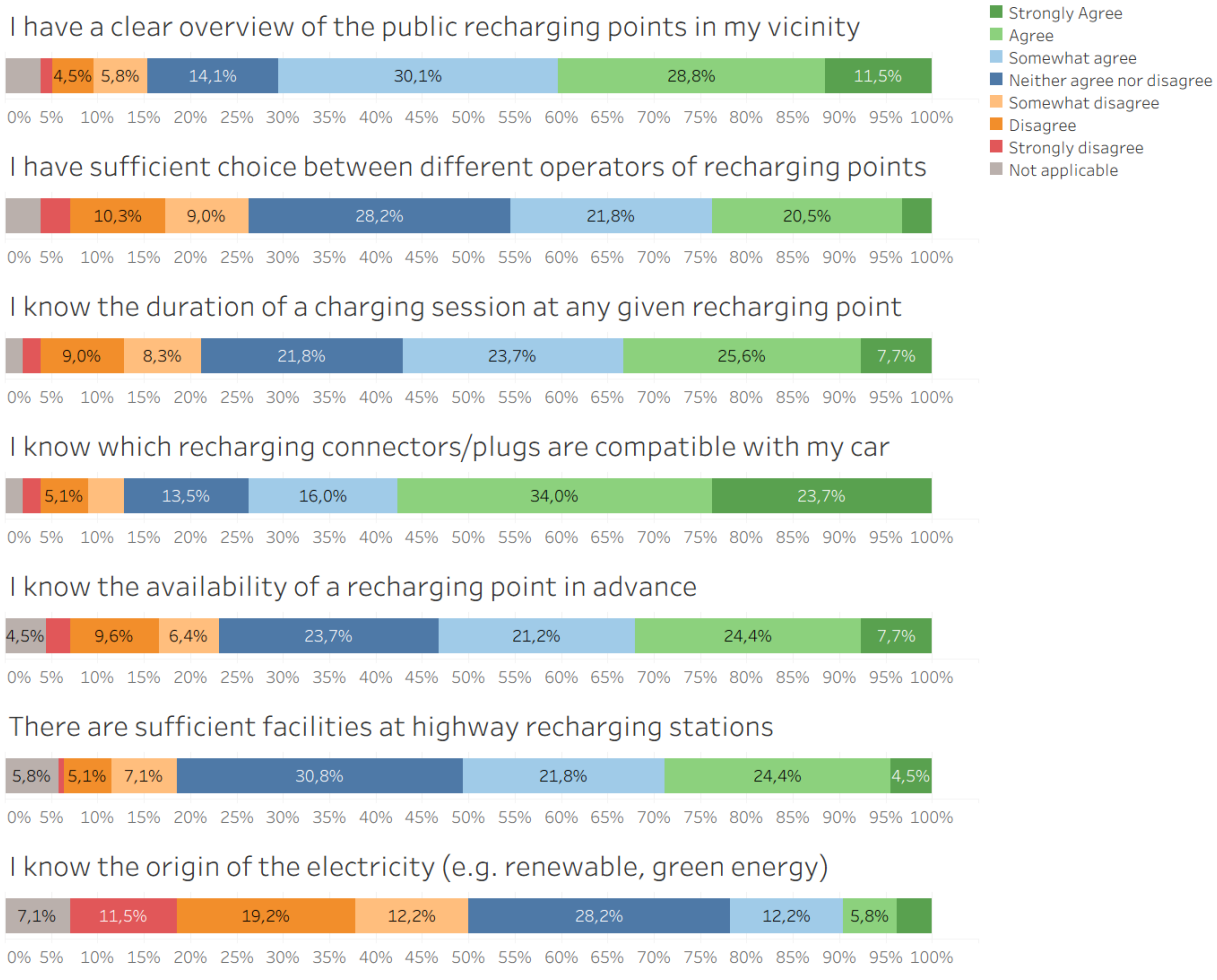
On the other hand, BEV drivers have a clear idea of their charging options. Most BEV drivers, 70,4%, have a clear overview of public chargers in their vicinity. Moreover, 73,7% know which recharging connectors/plugs are compatible with their car.

Figure 23: Luxembourgish BEV drivers' perceptions of public recharging pricing and value.



Source: EAFO Consumer Monitor and Survey 2026.

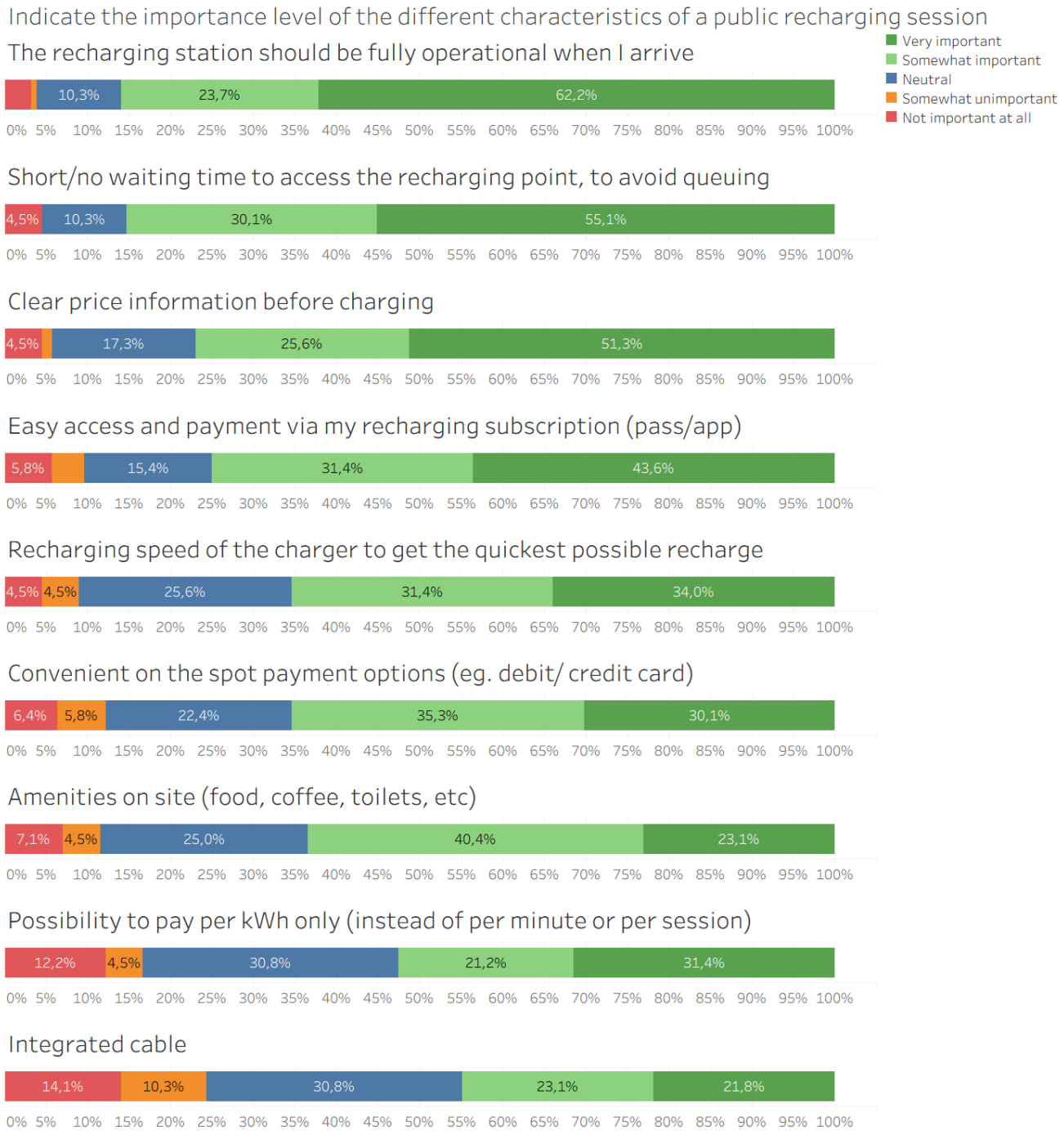
Figure 24: Drivers' Knowledge of Public Recharging Infrastructure, Availability, and Compatibility



Source: EAFO Consumer Monitor and Survey 2026.

The problem of price transparency raised in the previous paragraph is an important issue for BEV drivers. Price transparency appears to be the third most important characteristic of public charging stations, with 76,9% of drivers indicating that it is important to them. Only two characteristics score higher: short waiting times (85,2% find this at least somewhat important) and 'the recharging station should be fully operational when I arrive' (85,9% find this at least somewhat important).

Figure 25: Importance level of charging point characteristics according to Luxembourgish BEV drivers.



Source: EAFO Consumer Monitor and Survey 2026.

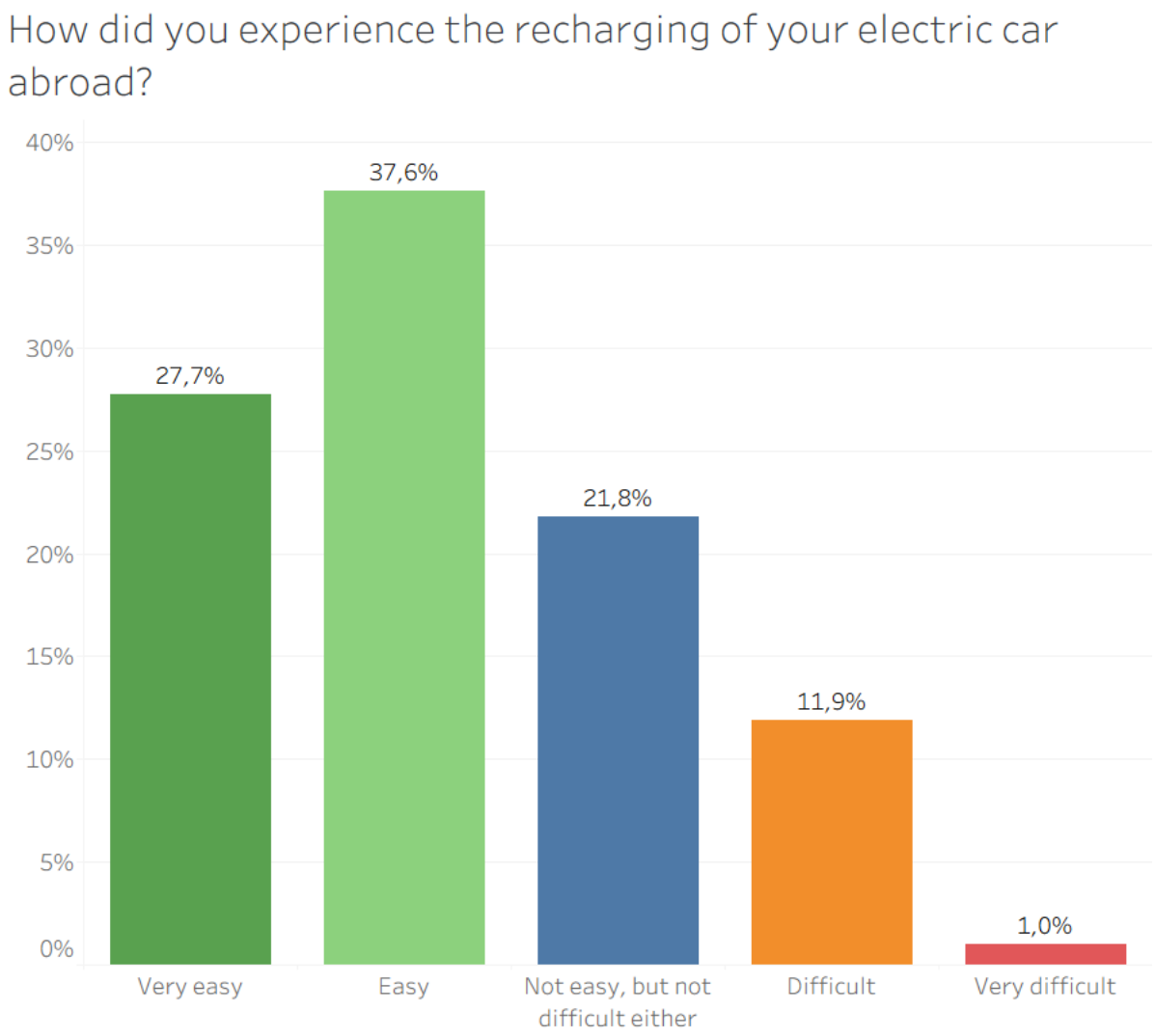
Price transparency is closely followed by 'easy access and payment via my recharging subscription (pass/app)' in the list of important characteristics. This is unsurprising given the fact that charging

cards and apps are the most popular payment method at public AC chargers, with 57,1% of BEV drivers making use of them. On-the-spot payments are used by 12,8% of drivers.

3.6 Main problems encountered by Luxembourgish BEV drivers when travelling abroad.

56,4 % of the Luxembourgish BEV drivers stated that they have travelled multiple times abroad with their BEV, 12,2% have travelled once, and 31,4% have never used their BEV to travel abroad. Although BEV drivers see recharging abroad more as a problem than the general population, the experience of BEV drivers who have recharged abroad is mostly positive. About 65% of drivers describe their experience as easy, and only 1% had a very difficult experience.

Figure 26: Luxembourgish BEV drivers' experience with charging abroad.



Source: EAFO Consumer Monitor and Survey 2026.

When they were asked to indicate the main problems encountered when travelling abroad, the main issue seems to be having to stop too often along the road. However, still less than half, 46,9%, at least somewhat agree that this is an issue.

Figure 27: Barriers to go on holiday with a BEV.

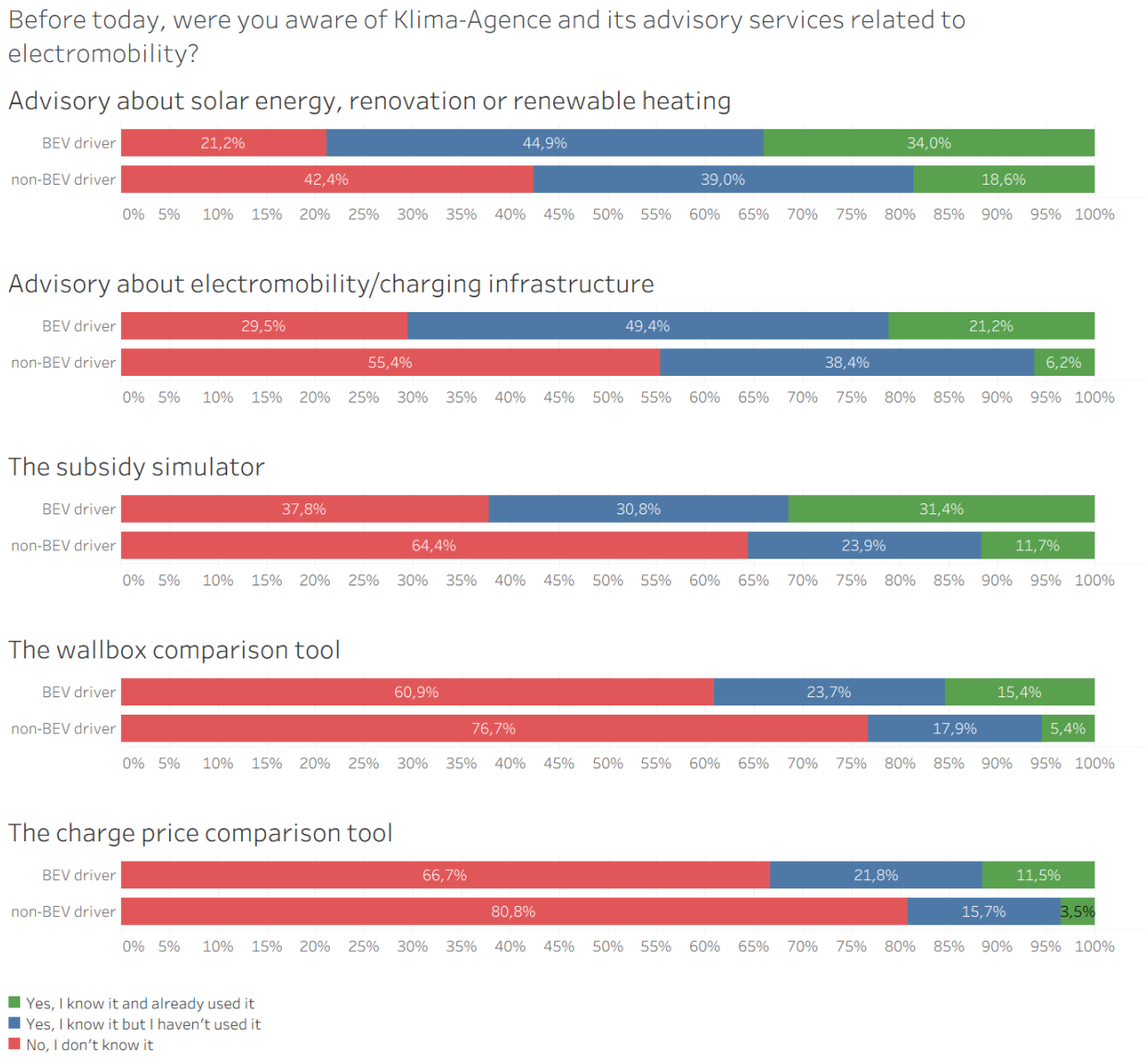
Source: EAFO Consumer Monitor and Survey 2026.

4 Luxembourg Specific Questions

At the request of the Luxembourgish Ministry of the Economy and Ministry of the Environment, Climate and Biodiversity, six new questions were included in the survey. This section compares the responses of BEV drivers and non-BEV drivers to these questions. See Annex I for the definition of 'BEV driver'.

The first question asked: *'Before today, were you aware of Klima-Agence and its advisory services related to electromobility?*'. The results are displayed in Figure 28. Awareness levels vary widely across advisory services and between BEV and non-BEV drivers. Overall, awareness seems low among non-BEV drivers: only the advisory about solar energy, renovation or renewable heating is recognized by more than half of the respondents. Among BEV drivers, only 21,2% haven't heard of this advisory. Furthermore, over 60% of them recognise two other initiatives: the advisory about electromobility and the subsidy simulator.

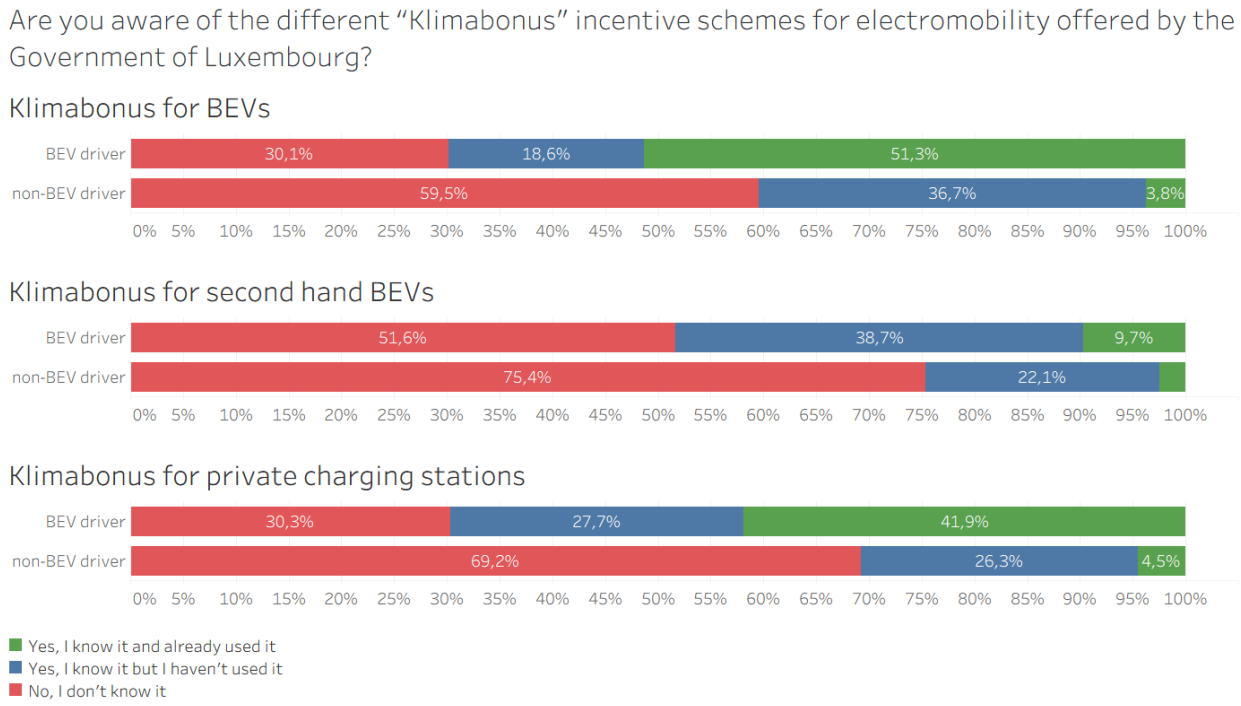
Figure 28: Luxembourgish drivers' awareness of Klima-Agence services.



Source: EAFO Consumer Monitor and Survey 2026.

The same differences between BEV and non-BEV drivers can be observed in the awareness of the different *'Klimabonus'* incentives, which were the subject of the second question.

Figure 29: Luxembourgish drivers' awareness of Klimabonus incentives.



Source: EAFO Consumer Monitor and Survey 2026.

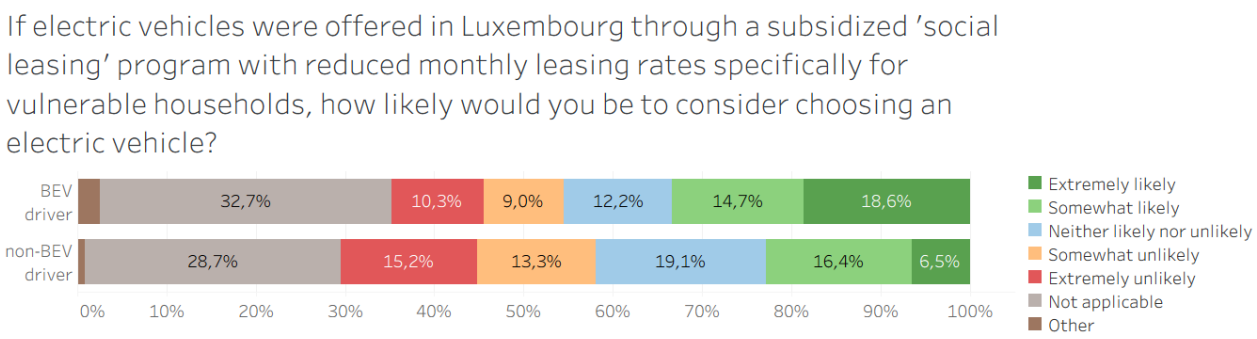
As shown in Figure 29, a large majority of non-BEV drivers are unaware of the Klimabonus incentives. This is a crucial observation, since the biggest BEV disadvantage according to this group of drivers is the price. Furthermore, almost 65% of non-BEV drivers unaware of the purchase subsidy for BEVs indicate that such a subsidy would have a medium (35,5%) or high (28,3%) impact.

A similar situation is present for the other two subsidies: the Klimabonus for second-hand electric vehicles is unknown for three-quarters of non-BEV drivers, but almost half of them would experience a medium (24,6%) or high (22,4%) impact when deciding whether to go electric. The Klimabonus for wallboxes is slightly more well-known, with 69,2% of non-BEV drivers being unaware of it. Meanwhile, 68% of these drivers would be significantly impacted by this subsidy (medium impact 26,6%, high impact 41,4%).

Notice also that the Klimabonus for second-hand BEVs is by far the least known Klimabonus for both types of drivers. Only about 30% of BEV drivers are unaware of the other two Klimabonus incentives, but for this particular incentive, that number rises to more than 50% of the population.

The third question was *'If electric vehicles were offered in Luxembourg through a subsidised social leasing program with reduced monthly leasing rates specifically for vulnerable households, how likely would you be to consider choosing an electric vehicle?'* Among BEV drivers, a larger proportion of respondents indicated that this question does not apply to them. Nevertheless, 33,3% reported being at least somewhat likely to consider an electric vehicle under such a scheme. This is notably higher than the interest among non-BEV drivers (22,9%).

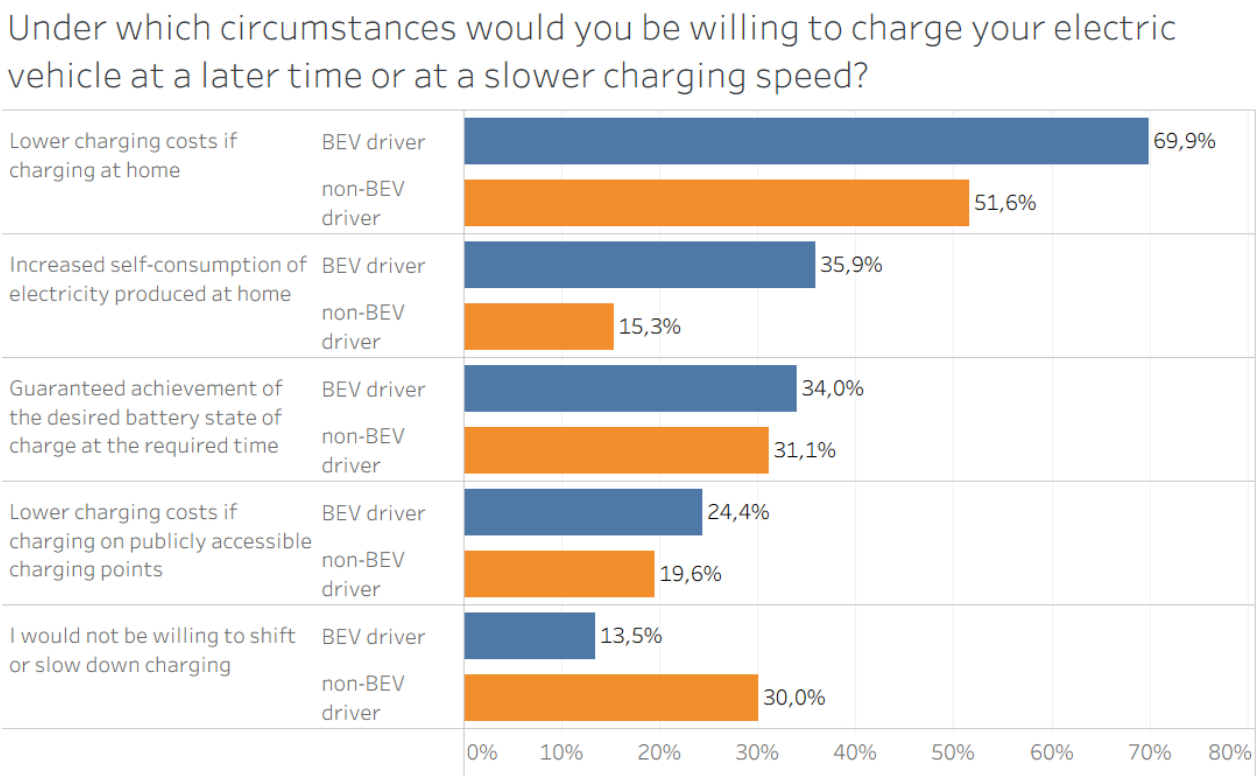
Figure 30: Luxembourgish drivers' likelihood to make use of a potential social leasing program for BEVs.



Source: EAFO Consumer Monitor and Survey 2026.

The fourth question asked under which circumstances the respondents would be willing to charge their electric car later or at a slower speed. Overall, BEV drivers are much more likely to adapt their charging behaviour. More than twice as many non-BEV drivers (30%) as BEV drivers (13,5%) stated not to be willing to shift or slow down charging. In both groups, the most accepted reason for doing so would be to profit from lower charging costs if charging at home. Increased self-consumption of electricity produced at home is the second most convincing reason for BEV drivers, but it is the least popular among non-BEV drivers. This is probably a consequence of non-BEV drivers being less likely to own REDs, as shown in section 2.1.

Figure 31: Luxembourgish drivers' willingness to delay charging of their BEV.

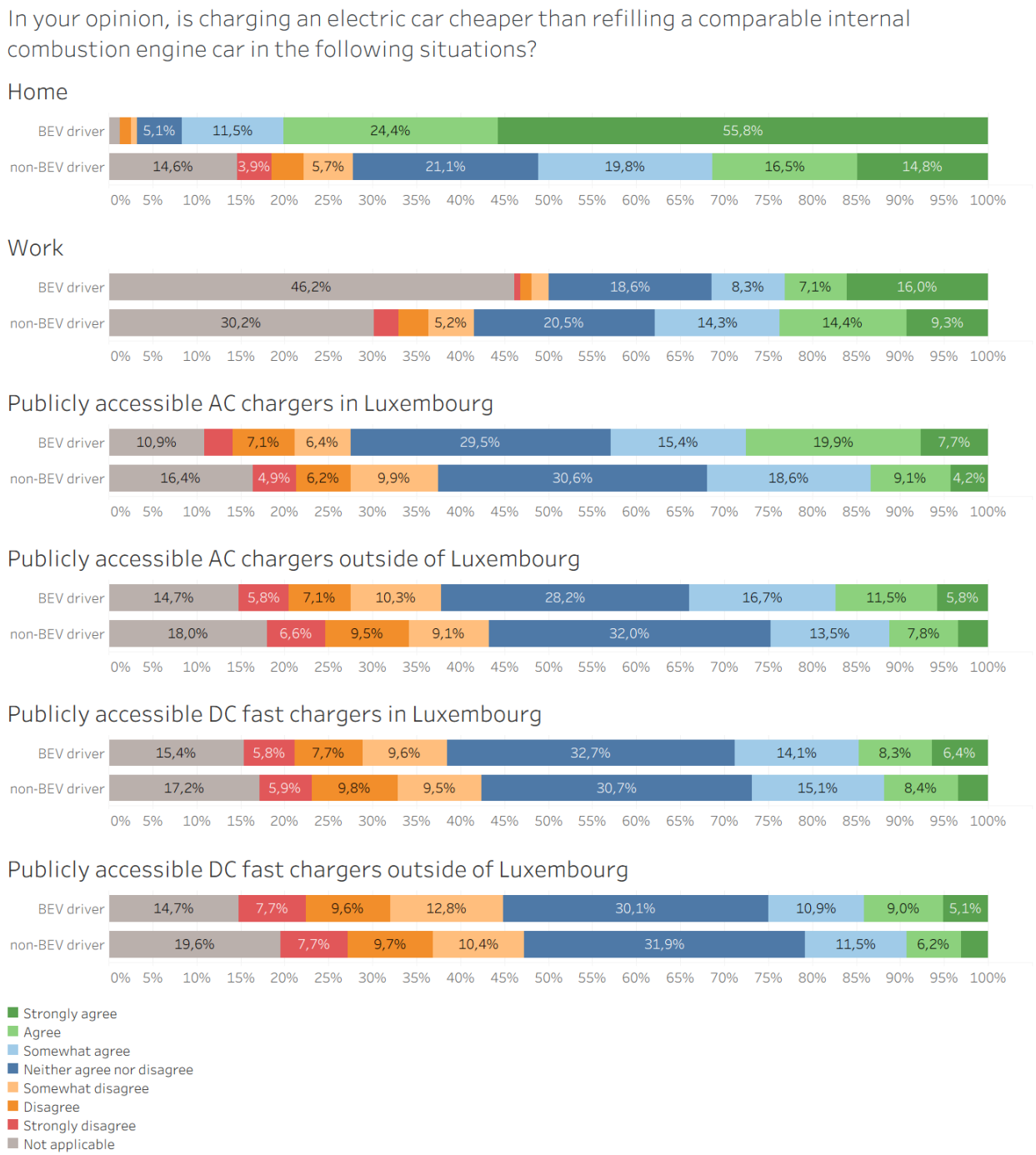


Source: EAFO Consumer Monitor and Survey 2026.

The fifth question asked: *'In your opinion, is charging an electric car cheaper than refilling a comparable internal combustion engine car in the following situations?'* Only charging at home is cheaper, according to more than half of the respondents, both BEV and non-BEV drivers. Recharging at work is cheaper according to 31,4% of BEV drivers and 38% of non-BEV drivers. This is considerably less than for home charging. However, that is partly caused by the large number of respondents for whom charging at work is *'not applicable'*: 46,2% among BEV drivers and 30,2% among non-BEV drivers.

When it comes to public charging, BEV drivers are more positive about recharge prices than non-BEV drivers. Furthermore, around 30% of respondents neither agree nor disagree with the statements about public charging, compared to around 20% in the case of charging at home or at work. This could indicate a lack of price awareness or transparency regarding public charging options.

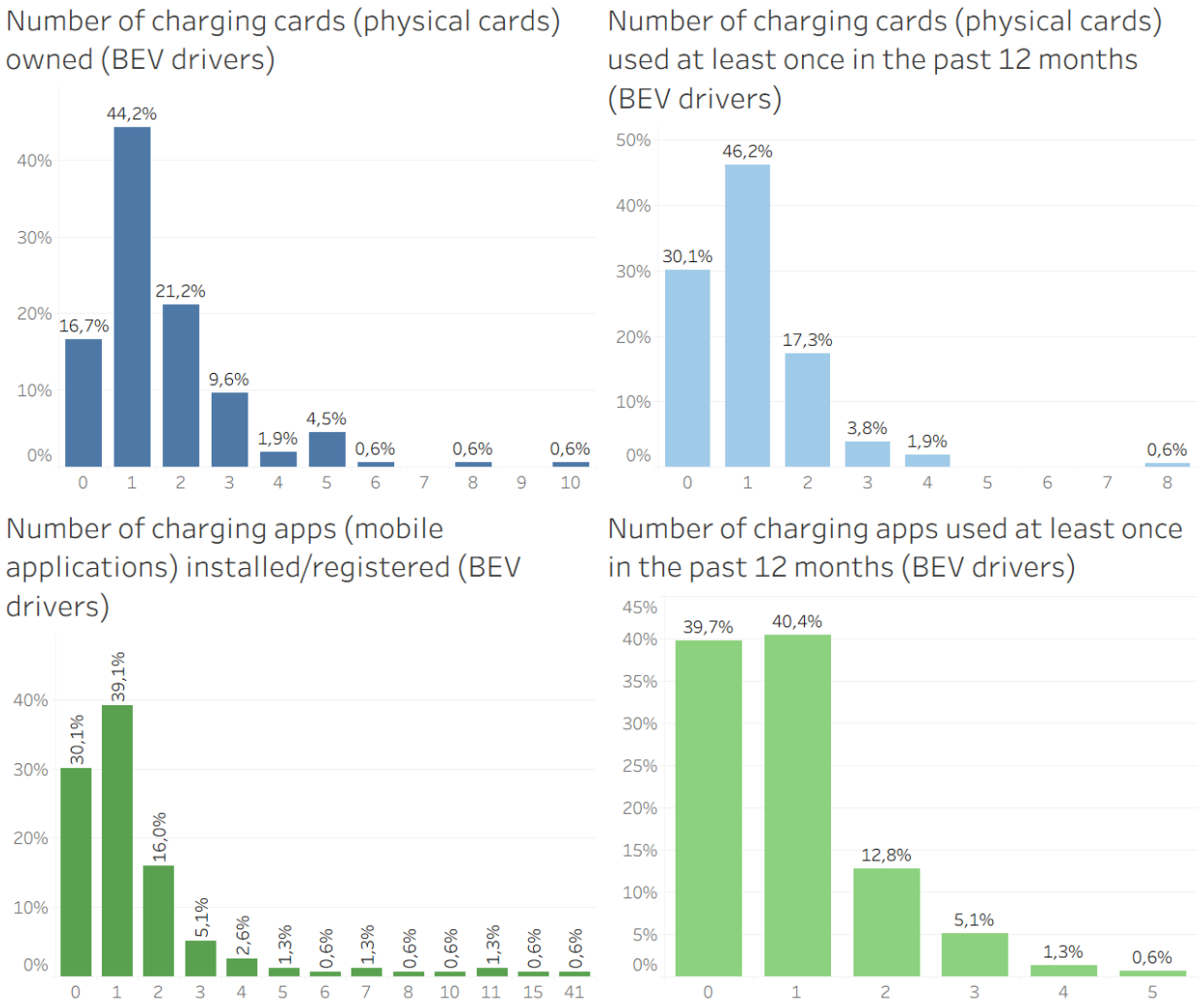
Figure 32: Luxembourgish drivers' opinion on charging costs compared to refuelling costs.



Source: EAFO Consumer Monitor and Survey 2026.

The sixth and final question consisted of four parts and measured how many charging cards and apps the respondents have and how many they actually use. In general, non-BEV drivers do not have charging cards (91,4%) or charging apps (92,8%), and they almost do not use them. Among BEV drivers, having and using one card and one app is most common. Furthermore, not having a charging app is almost twice as common as not having a charging card. The complete results for BEV-drivers are summarised in the following histograms in Figure 33.

Figure 33: Luxembourgish BEV drivers' charging card/app possession rates.



Source: EAFO Consumer Monitor and Survey 2026.

Annex I: Consumer monitoring methodology & approach.

For the 2026 launch of the EAFO consumer monitor Deep Dive in Luxembourg, the following approach was taken:

The survey was conducted using an online panel, in partnership with Dynata, of the general population of Luxembourg. The aim was to reach 1.000 respondents. The survey was launched in March 2026. The survey was open for 1,5 months.

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 filled out the survey in less than six minutes and 8 seconds are excluded from the survey. This cut-off was calculated as a third of the median survey time.
- Respondents with internally inconsistent responses (reporting more kilometres driven in one day than in a year, daily car use with less than 365 km driven annually, or less than 52 km driven per year while using the car multiple times per week) were excluded from the results.
- Respondents who indicated not owning a driver's licence were excluded.

The validation of the dataset was finalised in April 2026. A total of 1.005 responses were considered valid. Of these respondents, 156 were categorised as BEV drivers, as they indicated having a BEV as their first, second or third car. The remaining 849 were classified as non-BEV drivers.