

Mobility Insights Report EVs and Sustainability Edition

Corporate Affairs | February 2021

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Introduction

The LeasePlan Mobility Insights Report (formerly the Mobility Monitor) is a comprehensive survey of driver opinion regarding the most important subjects facing the industry, produced in partnership with leading research firm Ipsos

This year, the survey was conducted across 22 countries, including:

- Australia
- Austria
- Belgium
- Denmark
- Finland
- France
- GermanyGreece
- Italy
- LuxembourgNetherlands
- New Zealand
- RomaniSpain

Norway

Poland

- Sweden
- PortugalRomania
- Switzerland
- Turkey
- United Kingdom
- United States

This second edition analyses public opinion regarding electric driving and zero-emission mobility, as well as the biggest barriers stopping drivers from starting electric. With these insights, we can better understand what motivates drivers to make the switch to zero emission mobility, as well as what are the biggest roadblocks stopping them from making the transition.

The first Mobility Insights Report, which focused on mobility in the New Normal, was published in 2020. The third and final edition of the report will be focused on Car Data & Privacy, and is scheduled for Spring 2021.

The key findings of the Electric Vehicles and Sustainability Edition of the Mobility Insights Report are:



A surge in positive attitude towards electric driving, with a record 65% of respondents indicating that they view zero-emission electric driving favorably. Nearly half (44%) of all surveyed said that their opinion towards electric driving has favorably improved over the past three years



An increasing amount of respondents declared their intent to lease an electric vehicle (EV). Among those planning on leasing a car in the next 5 years, the vast majority (61%) say they will consider an electric vehicle



The benefits of electric driving are increasingly clear: EVs contribute to fighting climate change through lower CO2 emissions (according to 46% of those planning to go electric in the next five years); help improve air quality in towns and cities through lower NOX emissions (31%); and have an overall lower running cost (47%)



Key Findings

EV infrastructure and incentives needed today more than ever

While the majority of people surveyed view electric vehicles favorably, practical concerns surrounding infrastructure and incentives present active barriers to entry. Specifically:



35% of those planning to buy a car in the next 5 years cited insufficient charging infrastructure as preventing them from choosing an EV, while limited driving range, or so called "range anxiety", was the reason another 34% said they would not go electric



In Portugal and Germany, more than 5 in every 10 respondents who plan to buy/lease a car in the next 5 years said range anxiety would stop them from making the switch to electric driving



A majority (57%) of those who said they would not go electric state that a prohibitively high purchase price is what is stopping them from going zero-emission. This is especially true for drivers in New Zealand (70%), Belgium (68%), and Greece (65%)

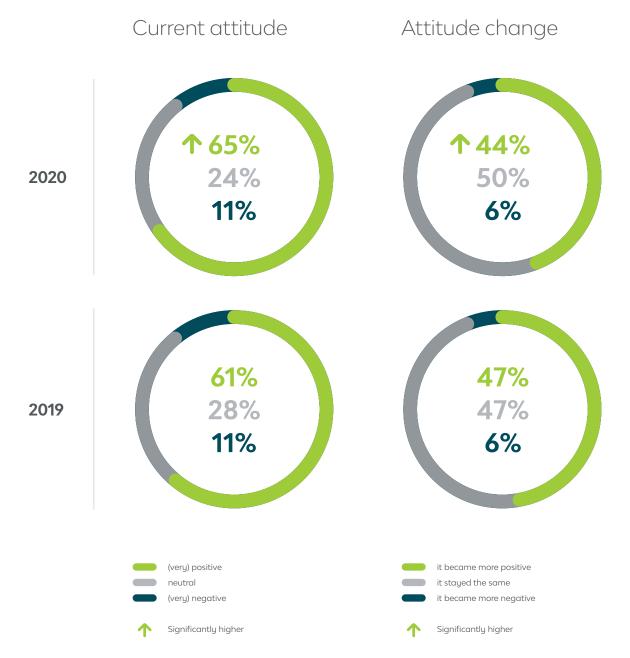
In Norway, however, a country with strong EV incentives, complaints about purchase price barely surface, with only 20% of drivers citing high costs as stopping them from going EV. This clearly demonstrates the effectiveness that EV incentives can have throughout an entire population

Chapter 1

EVs and Sustainability Edition

Attitudes towards EVs

Two thirds of respondents have a positive attitude towards electric cars. Almost half say their attitude towards electric cars became more positive over the last three years



Question: In general, what is your attitude towards electric cars? Question: Has your attitude towards electric cars changed in the last 3 years? Base: All respondents (2020 n= 5407 - 5205; n=4047-3876)

Chanae of attitude

Two out of three drivers have a (very) positive attitude towards electric cars. This attitude changed for the better over the last three years

Current attitude

	Current	attitude		CHOIL	ge of attit	dde
Total	n=5074	65%	24% 11%	n=5074	44%	50%
Australia	n=227	62%	26% 12%	n=227	38%	58%
Austria	n=245	48% 22%	29%	n=245	29%	55% 16%
Belgium	n=235	53%	33% 14%	n=235	33%	59% 8%
Denmark	n=238	70%	20% 11%	n=238	40%	54%
Finland	n=239	62%	28% 11%	n=239	42%	54%
France	n=241	52%	27% 21%	n=241	39%	49% 12%
Germany	n=245	40% 35%	25%	n=245	28%	59% 13%
Greece	n=249		84% 13%	n=249	55%	43%
Italy	n=227	77	% 19%	n=227	48%	50%
Luxembourg	n=94	54%	26% 20%	n=94	41%	49% 10%
Netherlands	n=229	57%	31% 13%	n=229	35%	58% 8%
New Zealand	n=241	69%	23% 9%	n=241	45%	49%
Norway	n=234	62%	24% 14%	n=234	37%	57%
Poland	n=226	72%	25%	n=226	42%	52%
Portugal	n=241		87% 9%	n=241	62	36%
Romania	n=244		85% 12%	n=244	56%	43%
Spain	n=245	70%	26%	n=245	54%	44%
Sweden	n=236	63%	22% 15%	n=236	41%	52%
Switzerland	n=237	60%	26% 13%	n=237	37%	52% 11%
Turkey	n=239		81% 17%	n=239		69% 30%
United Kingdom	n=238	58%	32% 10%	n=238	50%	45%
USA	n=224	56%	28% 15%	n=224	35%	60%
	n=224 (very) posi	tive m neutral	28% 15%	n=224	35% ecame more positive ecame more negative	it stayed t

Question: In general, what is your attitude towards electric cars? Question: Has your attitude towards electric cars changed in the last 3 years? Base: All respondents (2020 n=5407 - 5205)

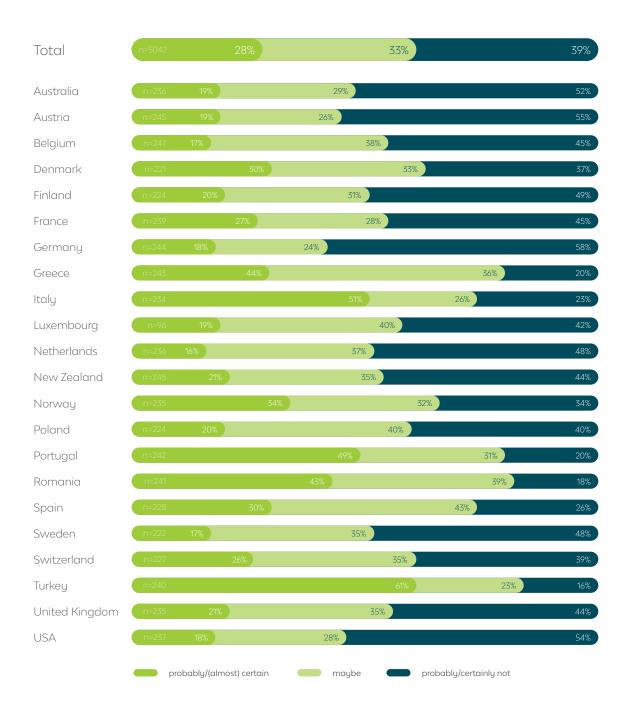
The vast majority of drivers have a positive attitude towards electric cars, and in almost all cases, the attitude has only become more positive in recent years

This means that, regardless of whether or not drivers plan to buy an EV, they view zero emission positively. Drivers from Southern Europe have the most positive attitude towards electric cars:



More than a quarter of drivers say their next car will be electric

Intention to buy an electric car



FD

Question: How likely are you to buy an electric car as your next car? Base: All respondents (2020 n=5407)

Younger drivers (34%) and drivers living in a big city (37%) are most likely to say they will go EV

34%

Of younger drivers are most likely to go EV 37%

Of drivers living in the city are most likely to go EV

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Chapter 2

Most popular reasons to go EV

Most popular reasons to go EV

The main reasons to buy or lease an electric car are low running costs and lower CO₂ emissions

Intention to buy

TOTAL (n=5407)	28%	33%	39%
Probably/(almost) cert	tain Maybe	Probably/certainly not	
Reasons to b	ouy or lease ai	n electric car	
		47% Low running costs (fuel/electricity)	
	4	46% Lower CO2 emissions	
	33% Govern	nment subsidies/tax benefits	
	31% Lower No	Ox emissions	
	30% Sufficient	charging possibilities in public places	
	28% Low repair/r	maintenance costs	
	28% Sufficient ch	narging possibilities at home	
	27% Less noise		
	27% Sufficient ran	nge of current electric vehicles	
17% S	Sufficient number of ele	ectric vehicle brands/models to choose from	
16% Pc	ossibility to enter cities	with low emission zones	
14% Suff	icient charging possibi	ilities at work	
12% Driving	g experience		
10% More sto	able resale value		
5% I have no/little	e influence on the car I	l buy	
5% Status and pe	ersonal reputation		
7% Other			

Question: What would be the most important reasons for you to buy or lease an electric vehicle as your next car (instead of a diesel or petrol vehicle)? Base: Respondents planned to buy or lease an electric car in the next five years (2020 n=5407) Most popular reasons to go EV

Low running costs is the most popular reason for drivers living in a big city to go EV (51%)

Lower CO₂ emissions is the most popular reason for women (48%) and younger people (51%) to go EV

51%

Of drivers living in a big city cite lower running costs as their reason to go EV

51%

Of young drivers cite lower CO₂ emissions as their reason to go EV

48%

Of women cite lower CO₂ emissions as their reason to go EV. For men, only 43% cite this reason

Top 3 reasons to buy or lease an electric car

	Lower CO ₂ emissions		Lower running costs		Government subsidies/tax benefits	
Total	46%	n=5407	47%	n=5407	33%	n=5407
Australia	37%	n=255	55%	n=255	24%	n=255
Austria	39%	n=251	43%	n=251	35%	n=251
Belgium	42%	n=255	37%	n=255	32%	n=255
Denmark	45%	n=253	35%	n=253	30%	n=253
Finland	42%	n=250	40%	n=250	30%	n=250
France	40%	n=252	36%	n=252	33%	n=252
Germany	35%	n=252	42%	n=252	35%	n=252
Greece	65%	n=253	67%	n=253	48%	n=253
Italy	59%	n=253	37%	n=253	42%	n=253
Luxembourg	55%	n=100	29%	n=100	37%	n=100
Netherlands	41%	n=251	50%	n=251	27%	n=251
New Zealand	48%	n=254	64%	n=254	28%	n=254
Norway	37%	n=250	46%	n=250	29%	n=250
Poland	48%	n=255	45%	n=255	25%	n=255
Portugal	59%	n=253	57%	n=253	41%	n=253
Romania	55%	n=256	47%	n=256	44%	n=256
Spain	52%	n=253	41%	n=253	42%	n=253
Sweden	39%	n=252	55%	n=252	31%	n=252
Switzerland	51%	n=250	39%	n=250	26%	n=250
Turkey	46%	n=252	61%	n=252	30%	n=252
United Kingdom	43%	n=253	54%	n=253	33%	n=253
USA	34%	n=254	49%	n=254	22%	n=254

Question: What would be the most important reasons for you to buy or lease an electric vehicle as your next car (instead of a diesel or petrol vehicle)? Base: Respondents planned to buy or lease an electric car in the next five years (n=5407)

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Chapter 3

Roadblocks preventing EV adoption

Purchase price is by far the most popular reason given for not buying an EV

Intention to buy or lease

TAL (n=5407) 29	9%	33%	39%
Probably/(almost) certain	Maybe	Probably/certainly not	
asons not to k	ouy or leas	se an electric car	
		57% Purchase price	
	35% Insuf	fficient charging possibilities in public place	es
	34% Limited	ed driving range	
3	30% Insufficient	nt charging possibilities at home	
289	% Insufficient r	range of current electric vehicles	
21% Ins	sufficient charging	ng possibilities at work	
15% Brands/m	nodels of used ele	lectric cars to choose from is insufficient	
15% Uncertair	nty about resale \	value	
14% Possible cu	uts on governmer	ent subsidies and tax benefits in the future	
14% I don't driv	ve enough kilome	etres a year to make it cost efficient	
12% Insufficient r	number of electric	ic vehicles brands/models to choose from	
14% I don't think	the environmento	tal benefits are large enough	
11% Brands/mode	els of new electric	c cars to choose from is insufficient	
11% Current techr	hology becoming	g outdated or obsolete	
7% Driving experienc	Ce		
I have no/little influe	ence on the car I l	l buy	
Status and personal	l reputation		
Other			

Question: What would be the most important reason(s) preventing you from buying or leasing an electric car as your next car? Base: Respondents planned to buy a car in the next five years but not an electric car (2020 n=5407)

Top 3 reasons for not buying an electric car

	Purchase price		Insufficient charging possibilities		Limited driving range	
Total	57%	n=5407	35%	n=5407	34%	n=5407
Australia	60%		46%		34%	
Austria	57%		37%		46%	
Belgium	68%		42%		28%	
Denmark	52%		36%		6%	
Finland	61%		32%		39%	
France	61%		27%		9%	
Germany	53%		36%		50%	
Greece	65%		47%		31%	
Italy	52%		35%		29%	
Luxembourg	39%		38%		23%	
Netherlands	58%		29%		34%	
New Zealand	70%		31%		34%	
Norway	20%		14%		21%	
Poland	63%		29%		38%	
Portugal	64%		38%		55%	
Romania	64%		39%		35%	
Spain	60%		42%		39%	
Sweden	61%		34%		48%	
Switzerland	44%		32%		31%	
Turkey	54%		37%		26%	
United Kingdom	55%		40%		38%	
USA	53%		41%		38%	

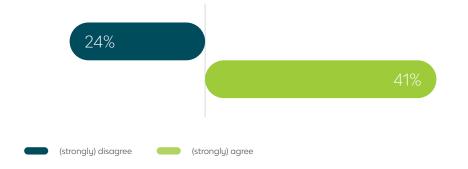
Question: What would be the most important reason(s) preventing you from buying or leasing an electric car as your next car? Base: Respondents planned to buy or lease a car in the next five years but not an electric car (n=5407)

The vast majority says that government incentives would help convince them to go electric

Strong government incentives, which lower electric car prices, would make me more likely to buy or lease an electric car



I am aware of government incentives in my country which make buying an electric car more affordable



Question: I am aware of government incentives in my country which make buying an electric car more affordable Question: Strong government incentives, which lower electric car prices, would make me more likely to buy or lease an electric car Base: All respondents (n=5208)

Chapter 4

The future of EVs

The future of EVs

More than half of drivers think that by 2030, most new cars will be electric cars (or another type of zero-emission car)

In 2030, most new cars will be electric cars or other types of zero-emission cars



Question: To what extent do you believe the following statements will have become true by 2030? Base: All respondents (n=5407) The future of EVs

In Portugal and Turkey, the vast majority (77% and 73%) believe that most of the new cars in 2030 will be electric (or another type of zero-emission car)

Portugal 77% Turkey 73%

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