LeasePlan

Mobility Insights Report

The 'New Normal' Edition

Corporate Affairs | December 2020

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Introduction

The Covid-19 crisis has shown us how unthinkable events can change the world overnight

Since the beginning of the pandemic, borders have closed, planes stopped flying, and entire countries went into different phases of lockdown. All social norms that society took for granted for decades suddenly changed, and we are now living in a 'New Normal' that has fundamentally altered the way the world thinks about a range of topics, including mobility.

Amid these unprecedented circumstances, LeasePlan is publishing it's annual Mobility Insights Report (formerly the LeasePlan Mobility Monitor). The Insights Report 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
- Germany
- Greece
- Italy
- Luxembourg
- Netherlands
- New Zealand
- Norway
- Poland
- Portugal
- Romania
- Spain
- Sweden
- Switzerland
- Turkey
- United Kingdom
- United States

This first edition looks at 'the New Normal', probing driver opinion of how the Covid-19 pandemic has changed the way we think about mobility, including: how respondents now prefer to travel, how they feel about their role in fighting climate change, as well as the role of delivery vehicles (or LCVs) in towns and cities given the recent boom in online shopping.

Key Findings

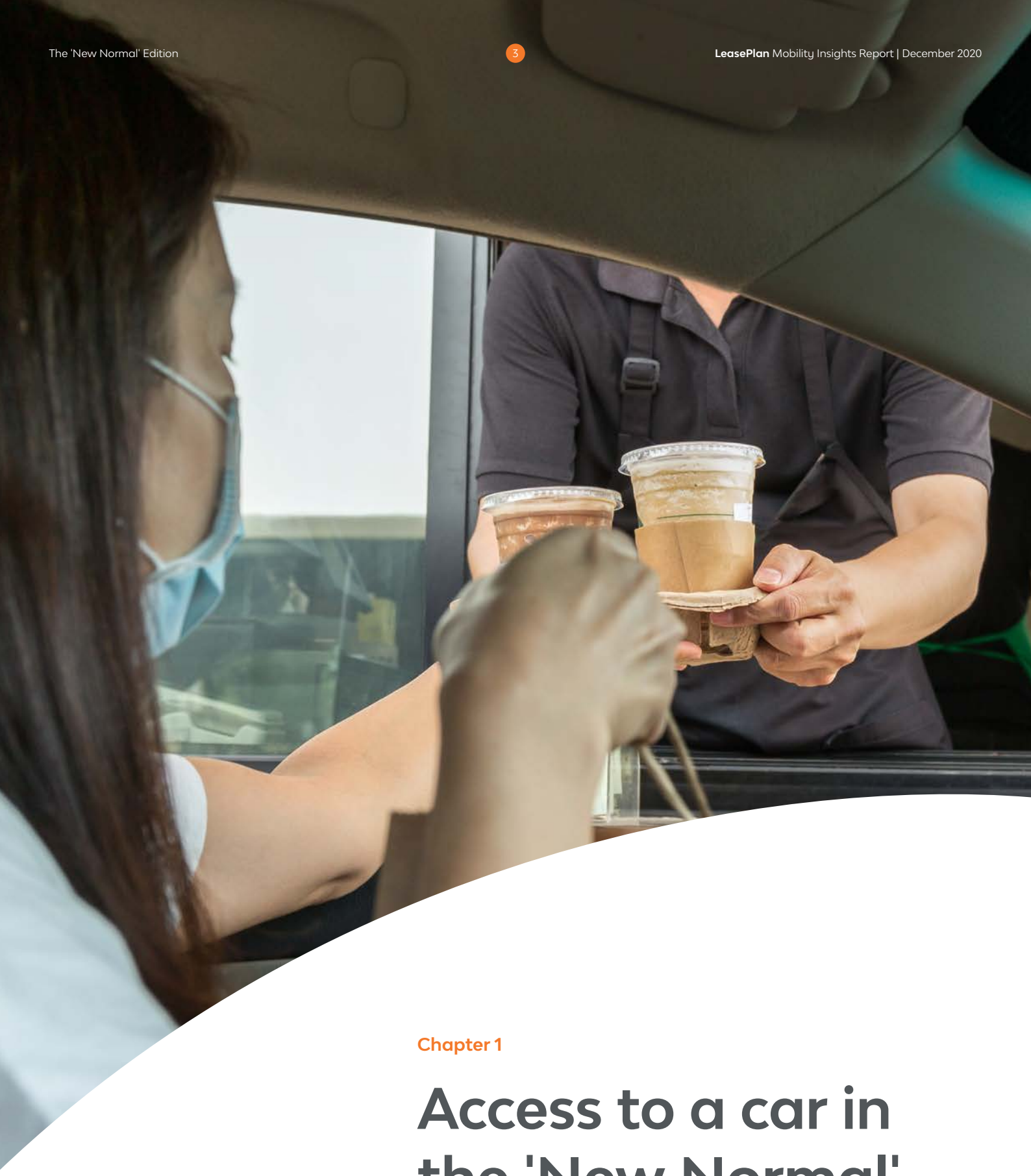
Since the beginning of the Covid-19 pandemic, respondents across all 22 countries have become much less likely to use public transportation (65%), and more likely to use their own private car (76%).

Most respondents (79%) say the pandemic has made them more aware of the safety and comfort of having their own vehicle.

More than half of respondents (53%) say they take climate change more seriously as a global threat since the beginning of the Covid-19 pandemic. For many (47%), this increased awareness has made them much more likely to switch to a zero-emission electric vehicle in the future in order to reduce their own carbon footprint and maintain the improved air quality experienced at the beginning of the pandemic.

Since the beginning of the pandemic, respondents are more likely to use online shopping and opt for home delivery for discretionary spending (47%), bolstering demand for LCV and electric LCV (eLCV) delivery vehicles.

Many respondents (47%) are worried about increased congestion and pollution from delivery vehicles post-Covid-19 – but the solution is clear: a vast majority (61%) of delivery drivers are willing to share their LCVs with other businesses to reduce congestion, as well as switch to zero-emission electric LCVs (75%) to reduce pollution.



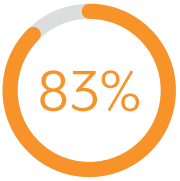
Chapter 1

Access to a car in the 'New Normal'

Access to a car in the New Normal

The vast majority of respondents have access to a car and can drive

Usually, the car they drive is their own, or belongs to someone in their household.



Yes, me or someone in my household owns a car

Yes, me or someone in my household leases a car

Yes, me or someone in my household is a user of subscription or car sharing services

No, but I can borrow a car from family/friends

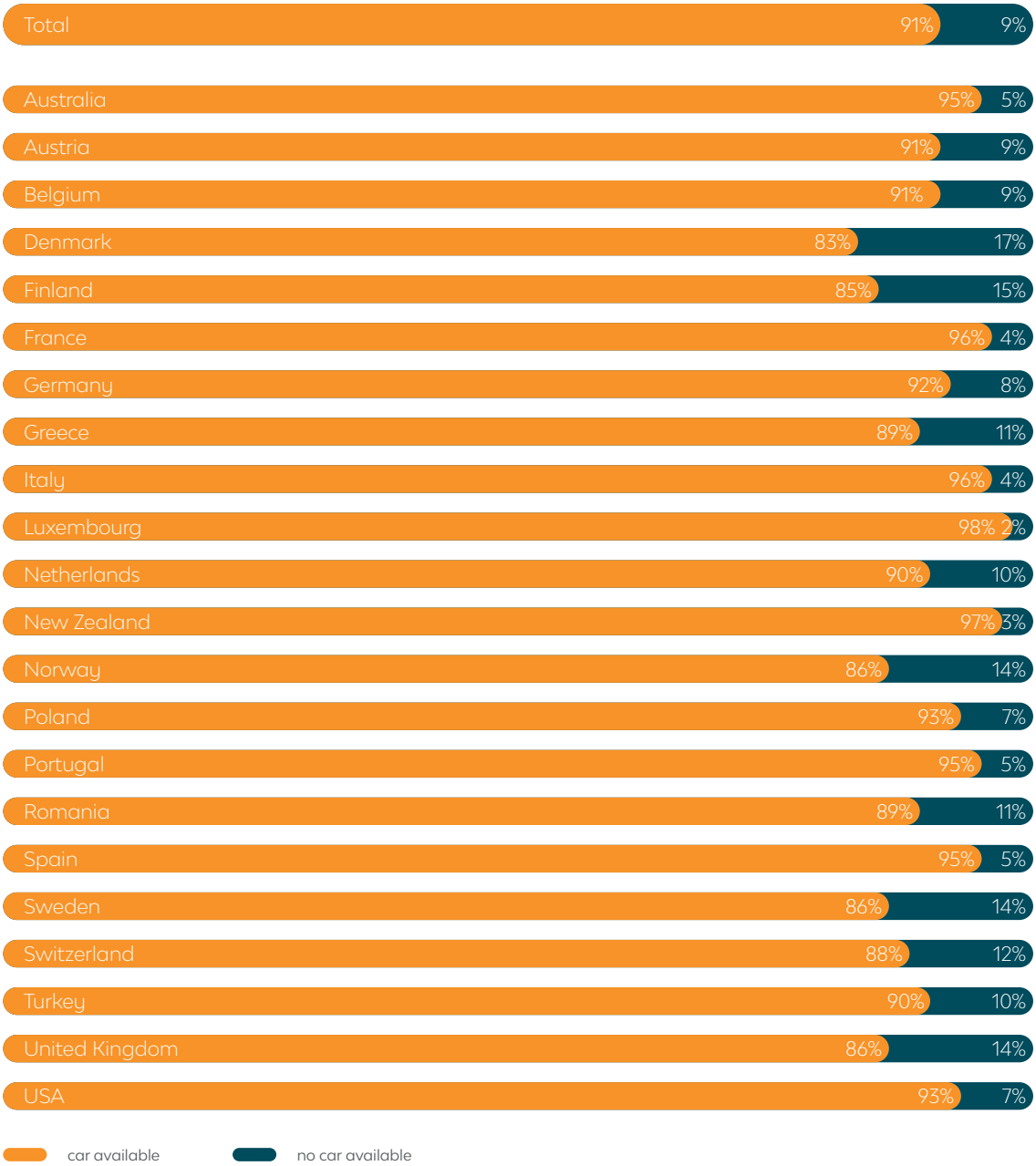
No

Question: Do you or someone in your household have a car?
Base: All respondents (2020 n=5407)

Access to a car in the New Normal

In Luxembourg and New Zealand almost everybody has access to a car

Availability of a car



Question: Do you or someone in your household have a car?
Base: All respondents (2020 n=5407)

Access to a car in the New Normal

Despite the unprecedented challenges of the New Normal, the private car is here to stay across all countries surveyed

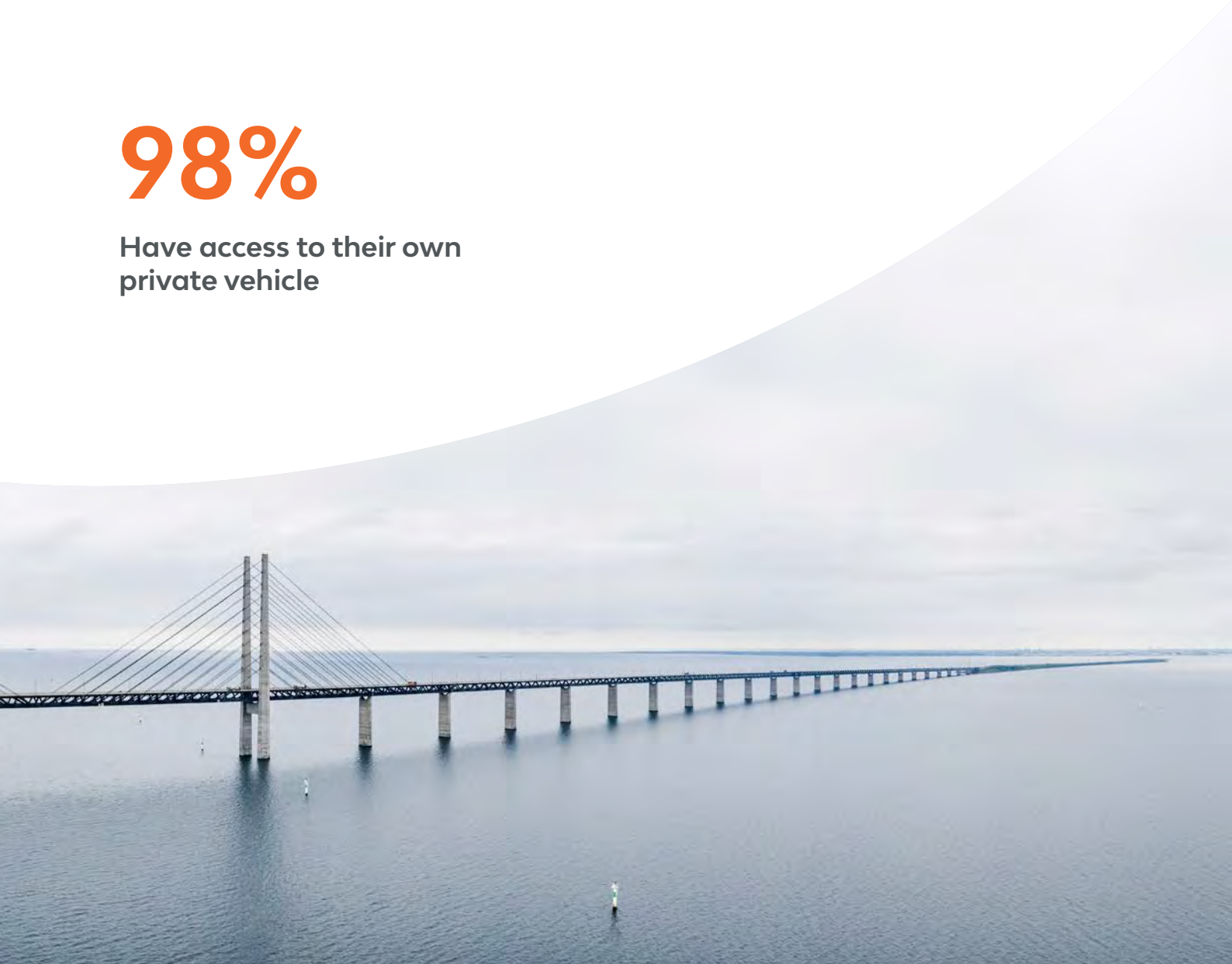
Even in countries where access to car is lowest, such as Denmark, the vast majority (83%) of respondents still have access to their own private vehicle.

Luxembourg

Has the highest car access

98%

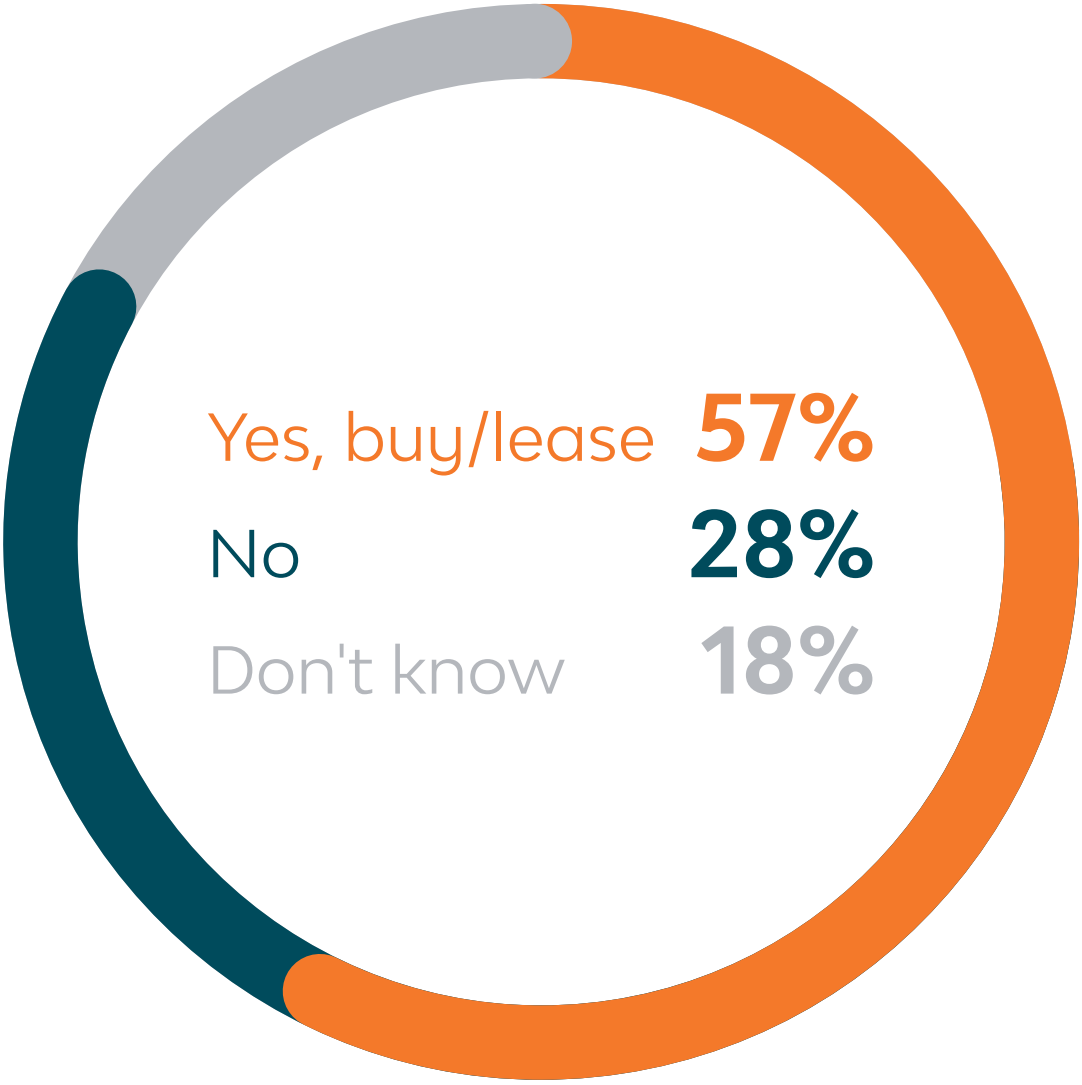
Have access to their own private vehicle



Access to a car in the New Normal

More than half of the respondents intend to buy/lease a new car in the next five years

Intention to buy or lease a car in the next 5 years

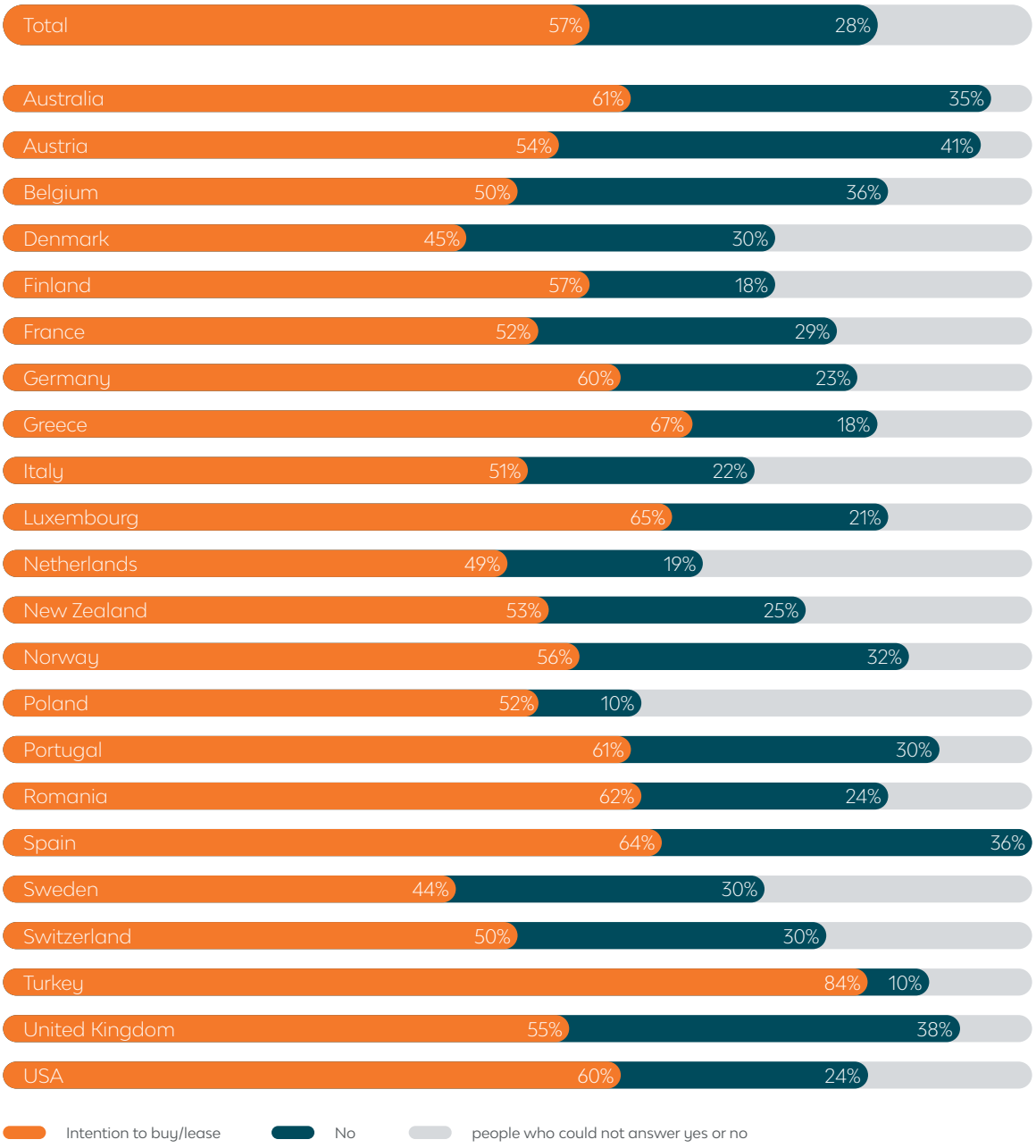


Question: Do you plan to buy or lease a car in the next 5 years?
Base: All respondents (2020 n=5407)

Access to a car in the New Normal

Respondents in Turkey, Greece and Spain are most likely to buy or lease a new car in the next 5 years

Intention to buy or lease a car in the next 5 years



Question: Do you plan to buy or lease a car in the next 5 years?
Base: All respondents (2020 n=5407)

Access to a car in the New Normal

Even in the midst of a global economic crisis, many respondents still intend to buy/lease a new car in the next 5 years

Across 22 countries, an outright majority (57%) are planning to get a new vehicle in the near future, including an overwhelming 84% in Turkey and 67% in Greece.

57%

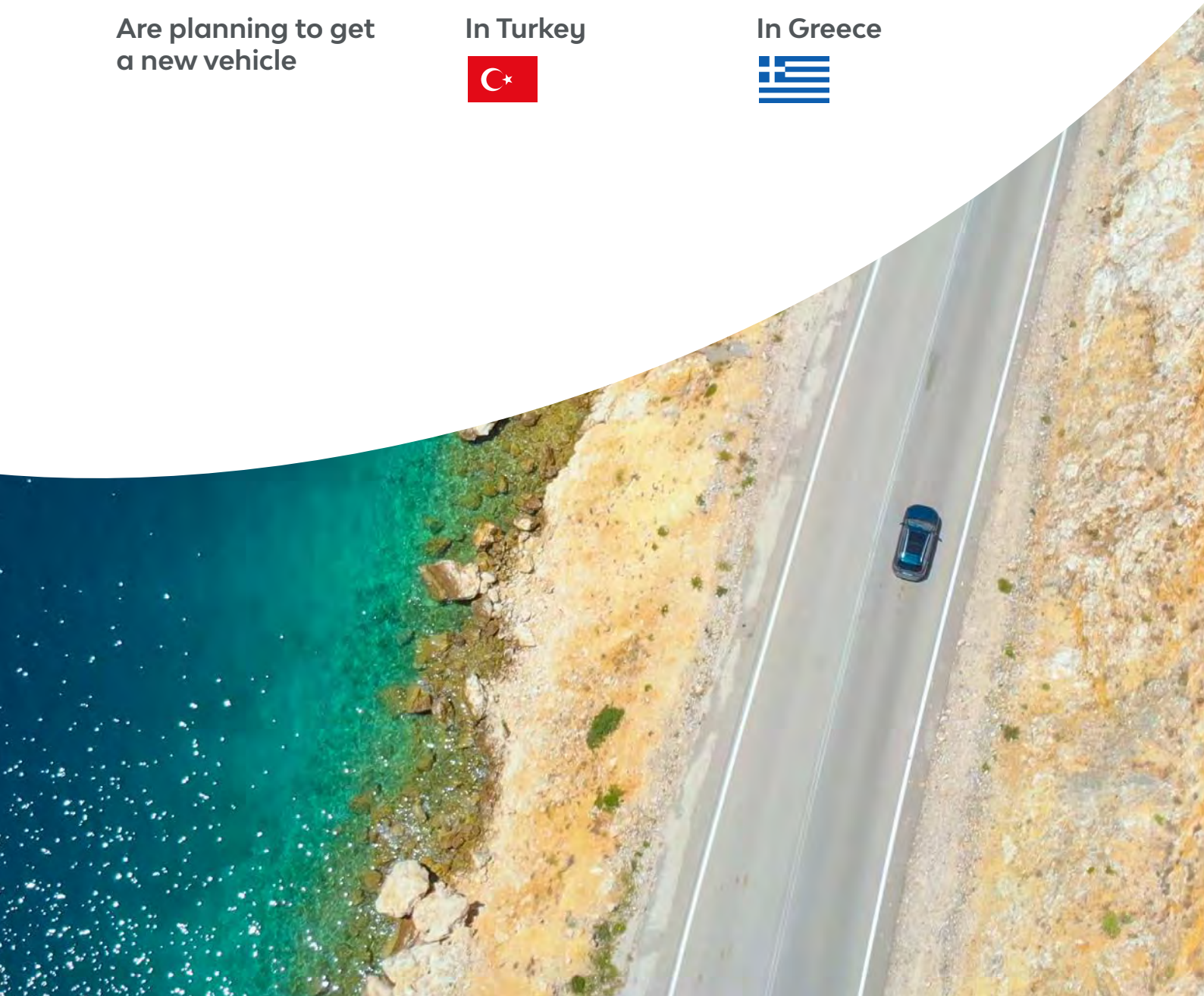
Are planning to get a new vehicle

84%

In Turkey

67%

In Greece



Access to a car in the New Normal

Car usage is split evenly between work and leisure

Purpose of car use

Question: Which purpose do you usually use your car for?
Base: All respondents (2020 n=4911)

Chapter 2

Changing attitudes toward mobility in the 'New Normal'

Changing attitudes toward mobility in the New Normal

Since the beginning of the Covid-19 pandemic, respondents are much more aware of the comfort of having their own car and are more comfortable using a car over other modes of transport

Since the beginning of the Covid-19 pandemic...

I am more aware of the comfort of having my own car

I am now more comfortable using a car over other modes of transport

I am now less likely to take public transport

I am more interested in finding ways to save on the costs associated with my car use

(strongly) agree (strongly) disagree

Question: Please indicate to what extent you agree with the following statements
Base: All respondents (2020 n=5407)

Changing attitudes toward mobility in the New Normal

Countries with highest % of mobility choice change post-Covid-19

I am more aware of the comfort of having my own car

I am now more comfortable using a car over other modes of transport

I am now less likely to take public transport

I am more interested in finding ways to save on the costs associated with my car use

Question: Please indicate to what extent you agree with the following statements
Base: All respondents (2020 n=5407)

Changing attitudes toward mobility in the New Normal

It is clear that the Covid-19 pandemic has had a huge impact on how respondents view mobility in the New Normal

Across 22 countries, a staggering 79% now are more aware than ever of the comfort of having their own car, while 76% are more comfortable using a car over other modes of transport. These findings show clearly that, in the New Normal, drivers prefer the safety and cleanliness of their own private car.

79%

More aware of the comfort of using their own car

76%

More comfortable using their own private car over other modes of transport

Changing attitudes toward mobility in the New Normal

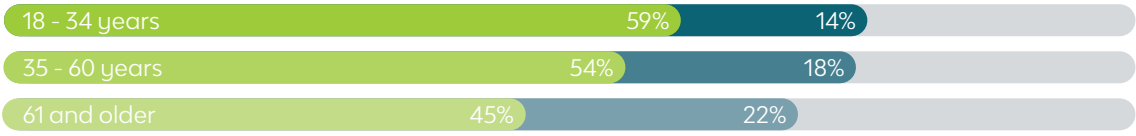
The results are consistent across generations – even younger respondents are more aware of the comfort of having their own car and are more comfortable using a car over other modes of transport in the New Normal

I am more aware of the comfort of having my own car

I am now more comfortable using a car over other modes of transport

I am now less likely to take public transport

I am more interested in finding ways to save on the costs associated with my car use



(strongly) agree
(strongly) agree
(strongly) agree

(strongly) disagree
(strongly) disagree
(strongly) disagree

Question: **Please indicate to what extent you agree with the following statements**
Base: **All respondents (2020 n=5407)**

Changing attitudes toward mobility in the New Normal

Since the beginning of the Covid-19 pandemic respondents take climate change more seriously and are more likely to take the environment into account when looking for a new vehicle

Since the beginning of the Covid-19 pandemic...

I am now more likely to take climate change seriously as a danger and global threat

To help maintain this positive air quality, I am now more likely to opt for a zero-emission vehicle

I am now more likely to reduce my own carbon footprint through switching to an electric car

I have noticed improved air quality where I live

(strongly) agree (strongly) disagree

Question: Please indicate to what extent you agree with the following statements
Base: All respondents (2020 n=5407)

Changing attitudes toward mobility in the New Normal

Countries with highest percentage of climate awareness change post-Covid-19

I am now more likely to take climate change seriously as a danger and global threat

To help maintain this positive air quality, I am now more likely to opt for a zero-emission vehicle

I am now more likely to reduce my own carbon footprint through switching to an electric car

I have noticed improved air quality where I live

Question: Please indicate to what extent you agree with the following statements
Base: All respondents (2020 n=5407)

Changing attitudes toward mobility in the New Normal

More than half of respondents (53%) say they take climate change more seriously as a global threat since the beginning of the Covid-19 pandemic

For many (47%), this increased awareness has made them much more likely to switch to a zero-emission electric vehicle in the future in order to reduce their own carbon footprint and maintain the improved air quality experienced at the beginning of the pandemic.

53%

Take climate change more seriously

47%

More likely to switch to zero-emission EV

Chapter 3

Online shopping and delivery vans in the 'New Normal'

Online shopping and delivery vans in the New Normal

Since the beginning of the Covid-19 pandemic, respondents are more likely to use online shopping and home delivery

Since the beginning of the Covid-19 pandemic, I am more likely to rely on home delivery for discretionary spending (such as fashion products and electronics)

It is important for me that the vehicle used for home deliveries is zero emission/does not pollute my neighbourhood

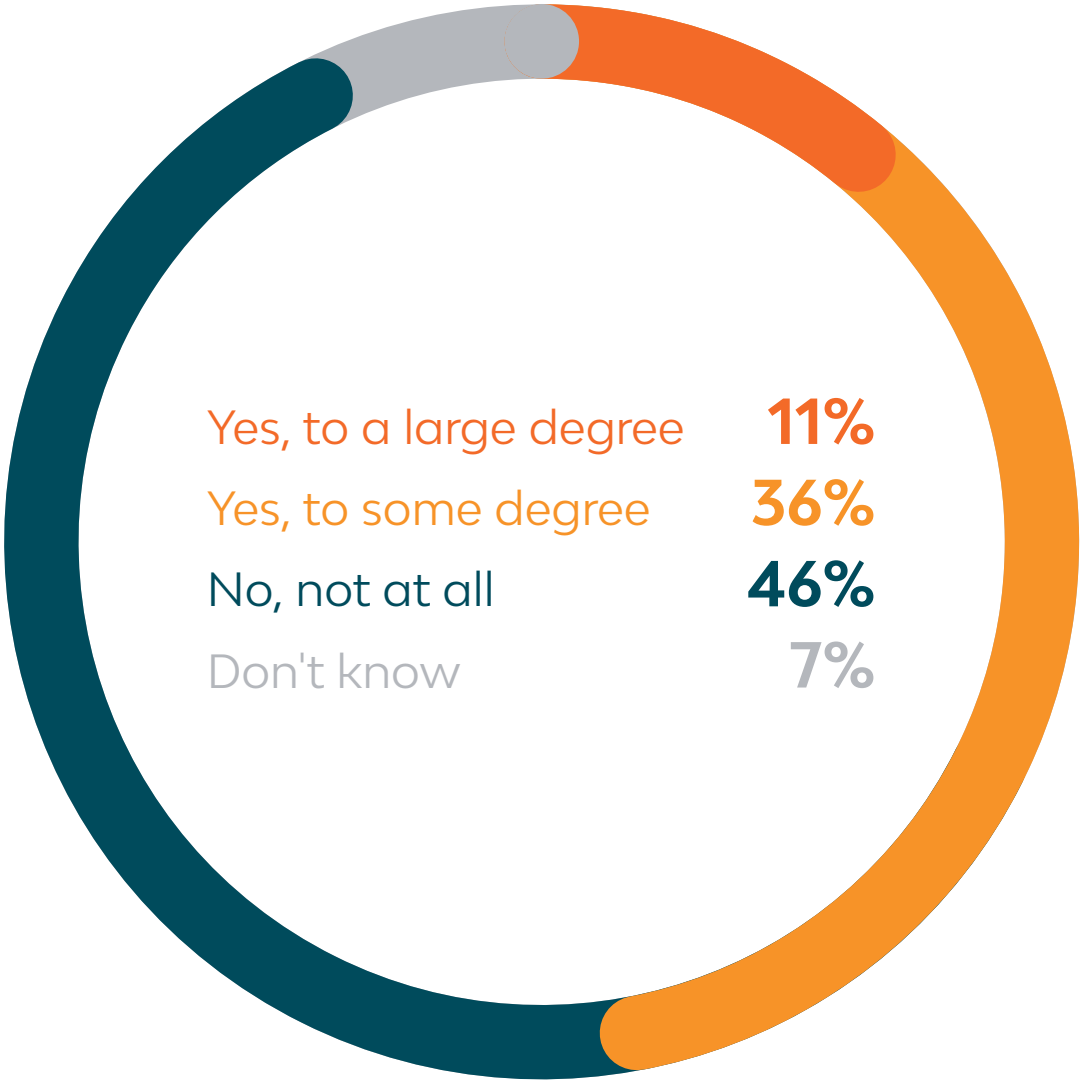
Since the beginning of the Covid-19 pandemic, I am more likely to rely on home delivery for essential products (such as groceries)

(strongly) agree (strongly) disagree

Question: Please indicate to what extent you agree with the following statements
Base: All respondents (2020 n=5407)

Online shopping and delivery vans in the New Normal

Since the beginning of the Covid-19 pandemic, nearly half of the respondents are worried about increasing congestion from delivery vehicles (due to the online shopping boom)



Question: Given the boom in online shopping and home delivery, are you worried about increasing congestion from delivery vehicles?
Base: All respondents (n=5407)

Online shopping and delivery vans in the New Normal

Who is most and least worried about congestion from delivery vehicles?

Younger people (57%) and people living in a big city (52%) are most worried about increasing congestion from delivery vehicles.

57%

Of younger people are worried about congestion form delivery vehicles

52%

Of people in big cities are worried about congestion form delivery vehicles

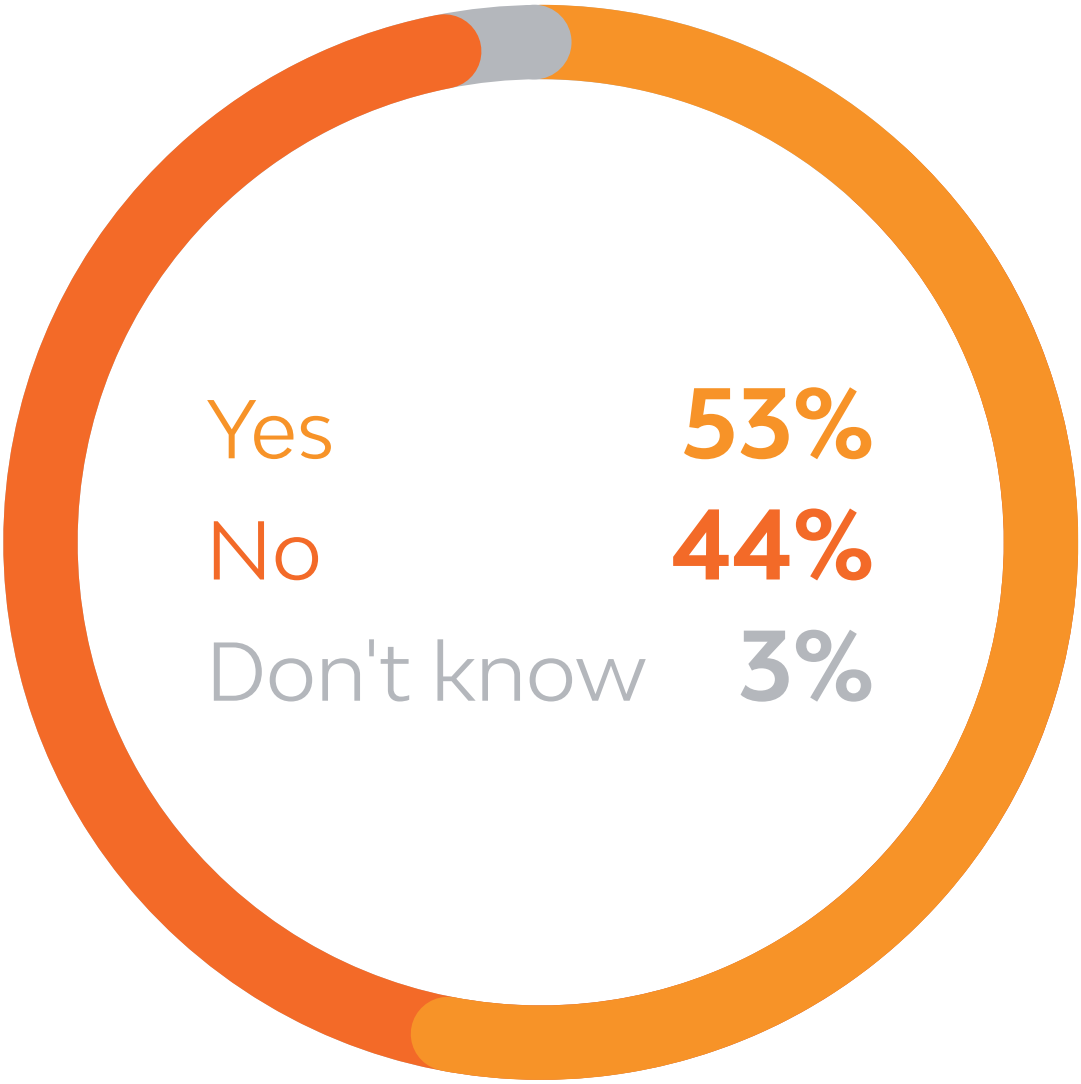
People from **Norway, Sweden, Finland** and **New Zealand** are the least concerned

Question: Given the boom in online shopping and home delivery, are you worried about increasing congestion from delivery vehicles?
Base: All respondents (n=5407)

Online shopping and delivery vans in the New Normal

For workers who are delivering online shopping orders, LCVs are an essential part of their daily work

Dealing with LCVs in their daily work

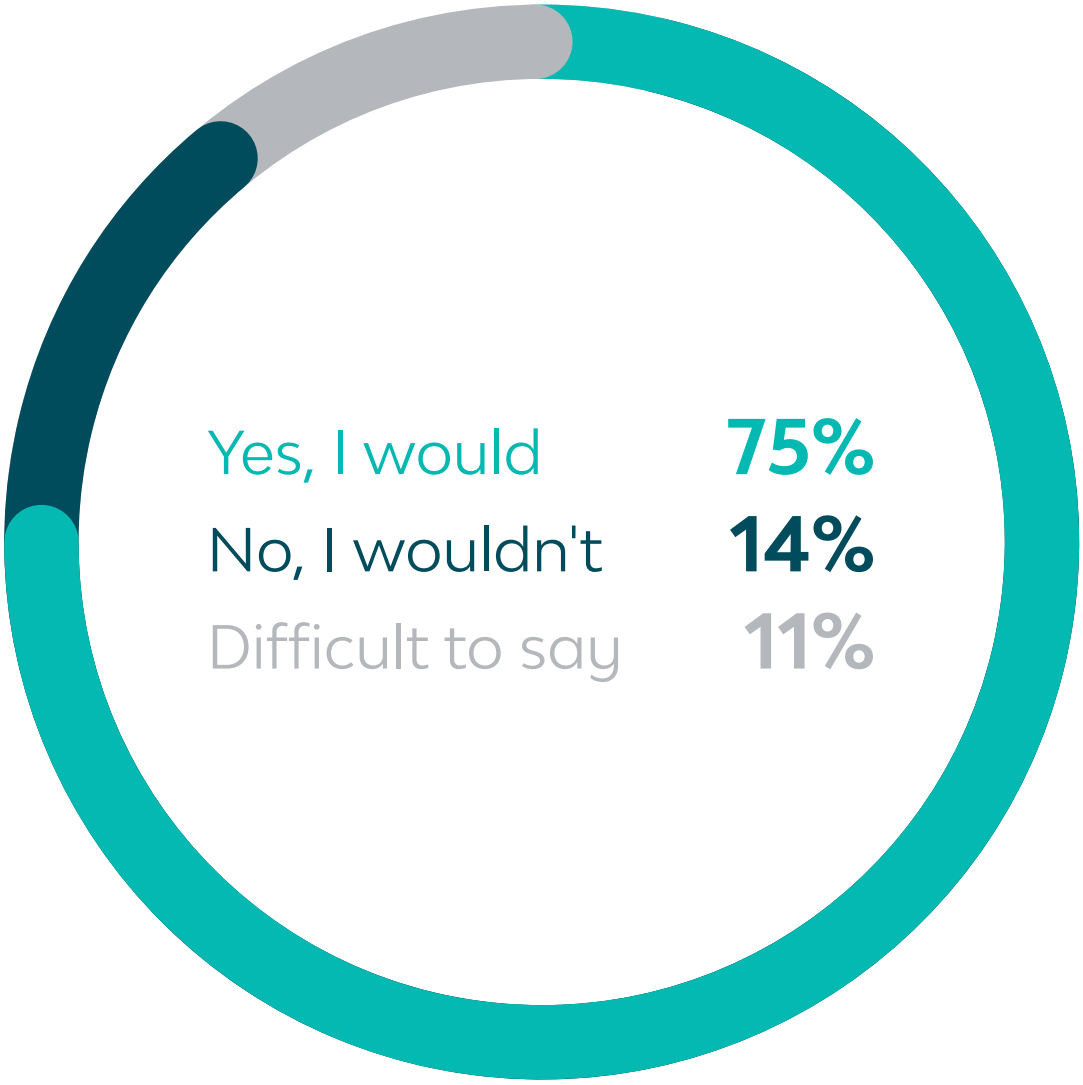


Question: Are you dealing with Light commercial vehicles (LCV) in your job? (Light commercial vehicles – a commercial vehicle typically used for delivery which does not weigh more than 3.5 metric tons)
Base: Respondents that work in the field of logistics and delivery (n=513)

Online shopping and delivery vans in the New Normal

The vast majority of those making online deliveries are willing to switch to an electric light commercial vehicle (eLCV)

Consider using a zero-emission electric LCV (eLCV)

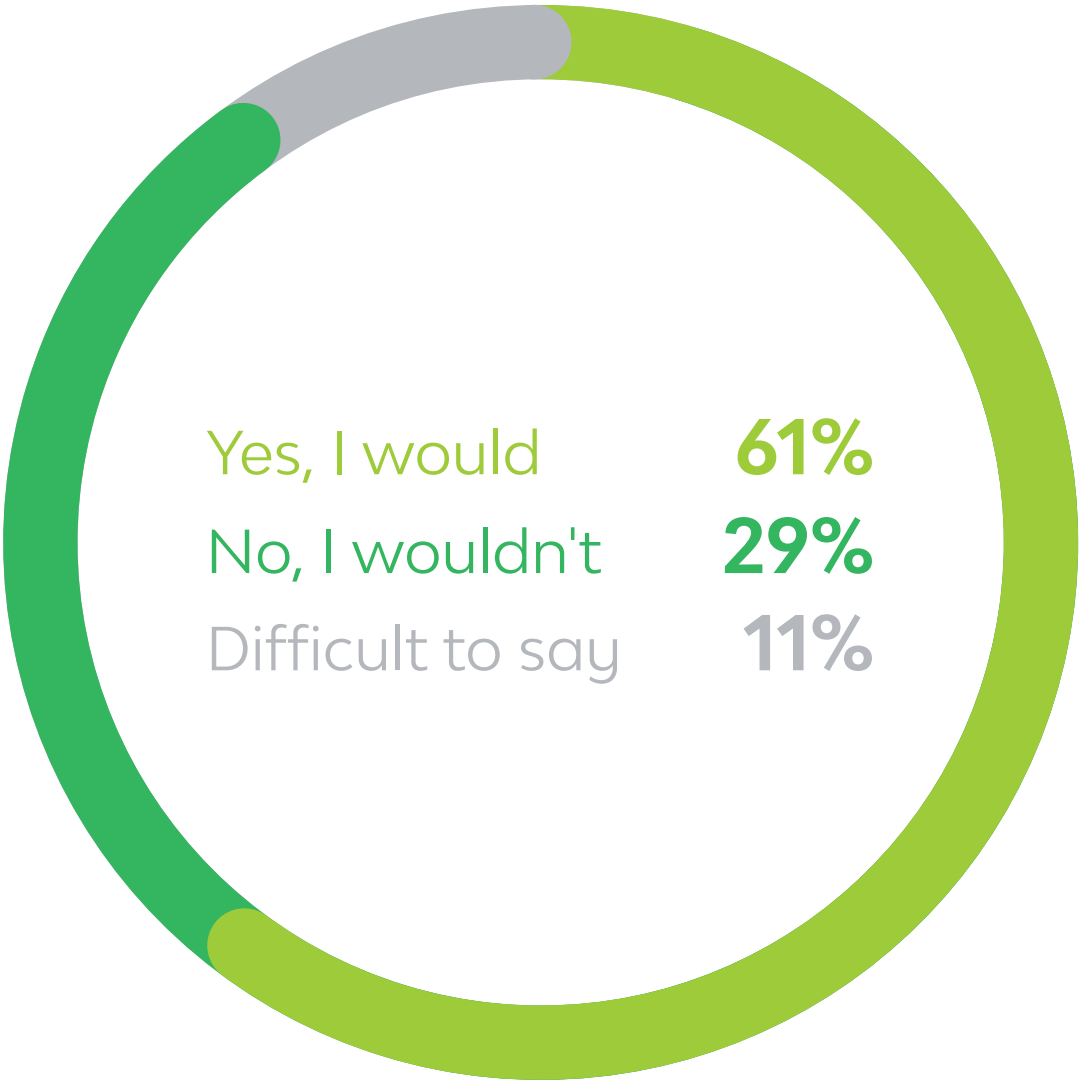


Question: Would you consider using a zero-emission electric LCV (eLCV)?
Base: Respondents that deal with LCVs in job (n=272)

Online shopping and delivery vans in the New Normal

The vast majority would also consider sharing an LCV with another business to save money and reduce congestion

Consider sharing LCV with another business



Question: Would you consider sharing your LCV with another business to save money?
Base: Respondents that deal with LCVs in job (n=272)

Online shopping and delivery vans in the New Normal

The pandemic has changed the way shopping takes place, with nearly half (47%) of respondents saying they are more likely to rely on home delivery for discretionary spending. As a result, some people worry about more congestion from delivery vans (LCVs), especially younger people (57%) and people living in a big city (52%).

For their part, LCV drivers are open to solutions that would reduce congestion as well as pollution. 61% of LCV drivers would consider sharing their LCV with another business to cut down on congestion, while an overwhelming 75% of LCV drivers would consider making the switch a zero-emission electric LCV (eLCV).

You can learn more about making the switch to eLCVs in one of LeasePlan's latest whitepapers:
Why it's time to transition to an eLCV fleet

leaseplan.com.au