

The LeasePlan logo is a stylized, wavy graphic in shades of orange and red, resembling a series of connected arches. The word "LeasePlan" is written in white, sans-serif font across the middle of the graphic.

LeasePlan

An aerial photograph showing a winding asphalt road with yellow dashed lines, cutting through a dense, green forest. In the distance, a coastline with a bay and hills is visible under a blue sky with light clouds.

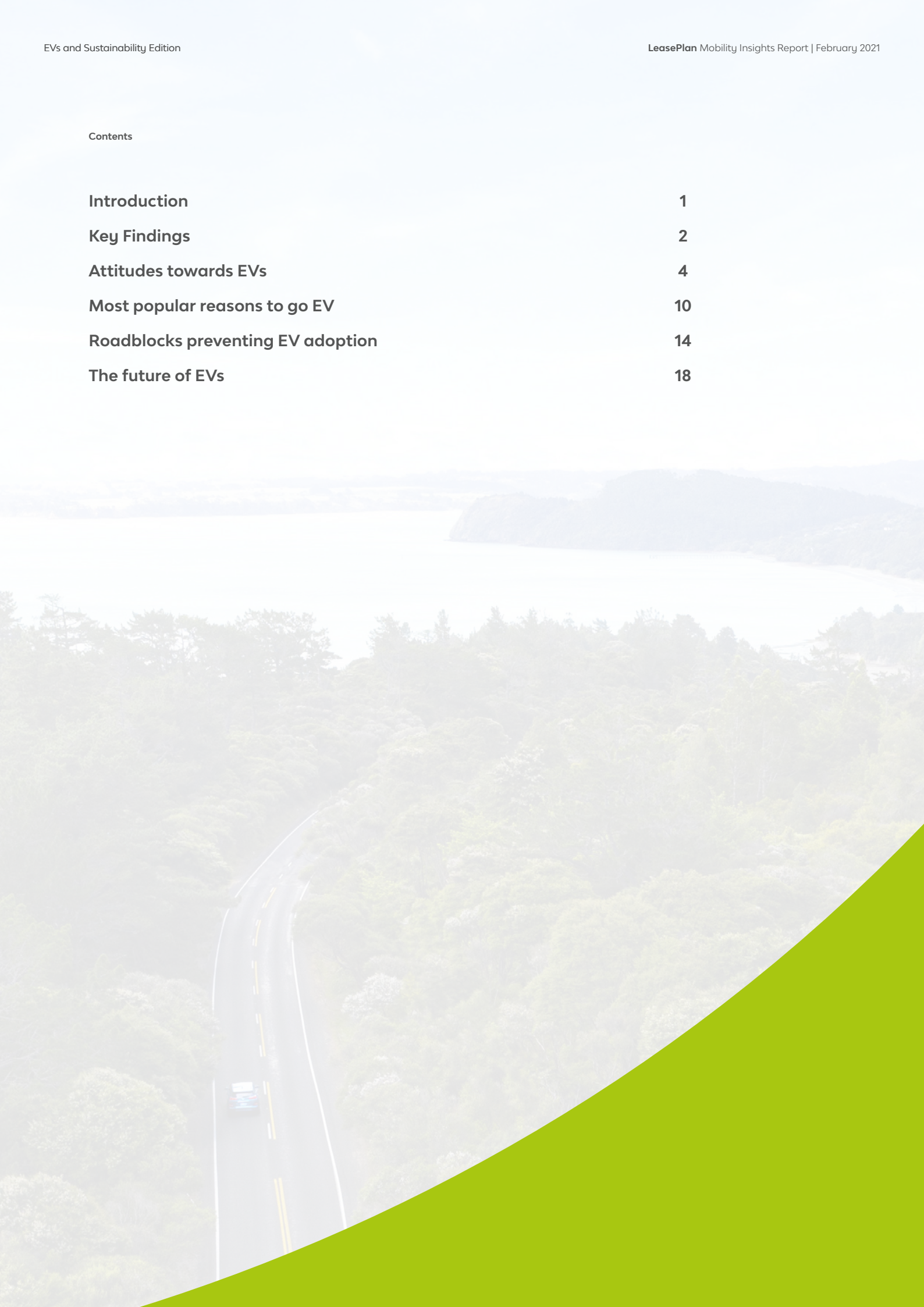
Mobility Insights Report

EVs and Sustainability Edition

Corporate Affairs | February 2021

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Introduction

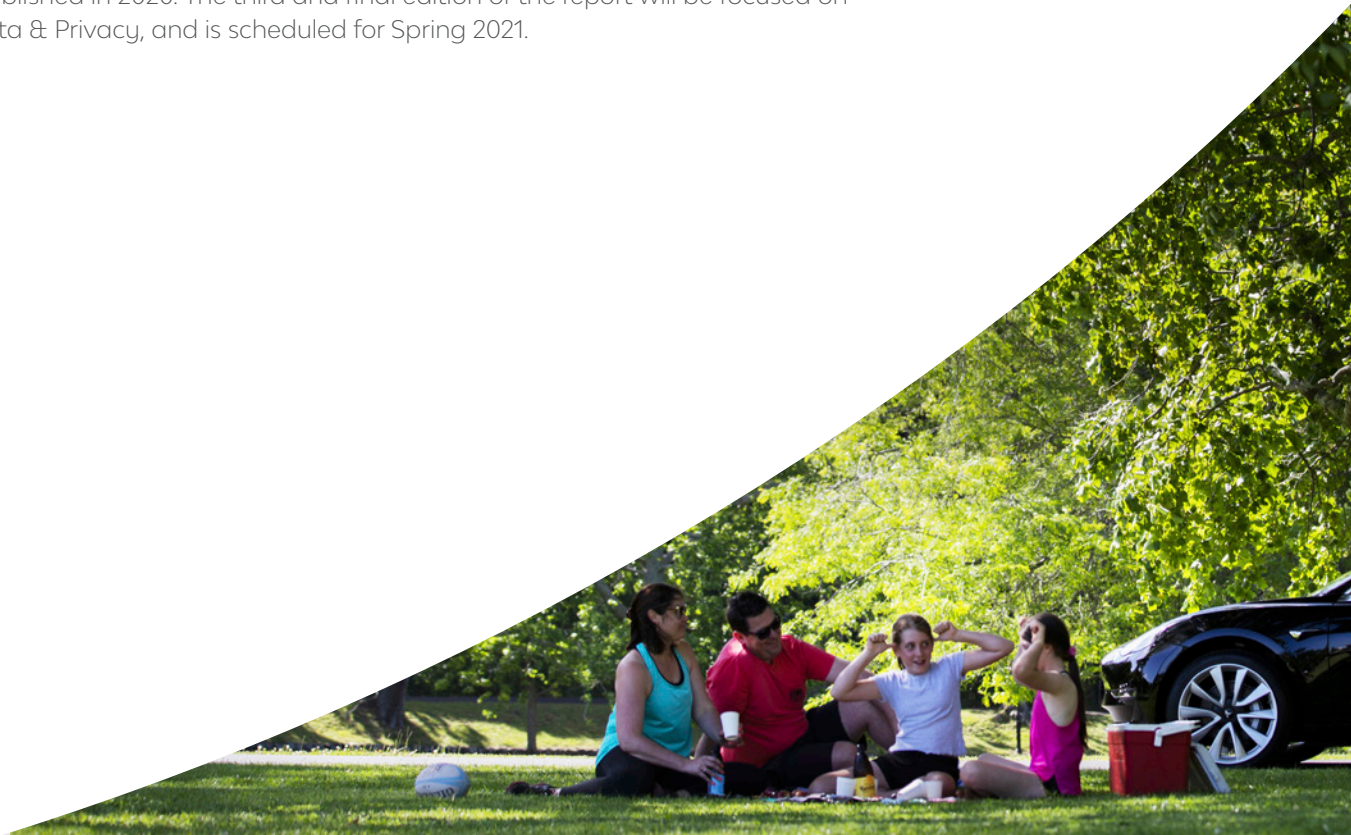
The LeasePlan Mobility Insights Report (formerly the Mobility Monitor) is a comprehensive survey of driver opinion regarding the most important subjects facing the industry, produced in partnership with leading research firm Ipsos

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

- Australia
- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Greece
- Italy
- Luxembourg
- Netherlands
- New Zealand
- Norway
- Poland
- Portugal
- Romania
- Spain
- Sweden
- 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.



Key Findings

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



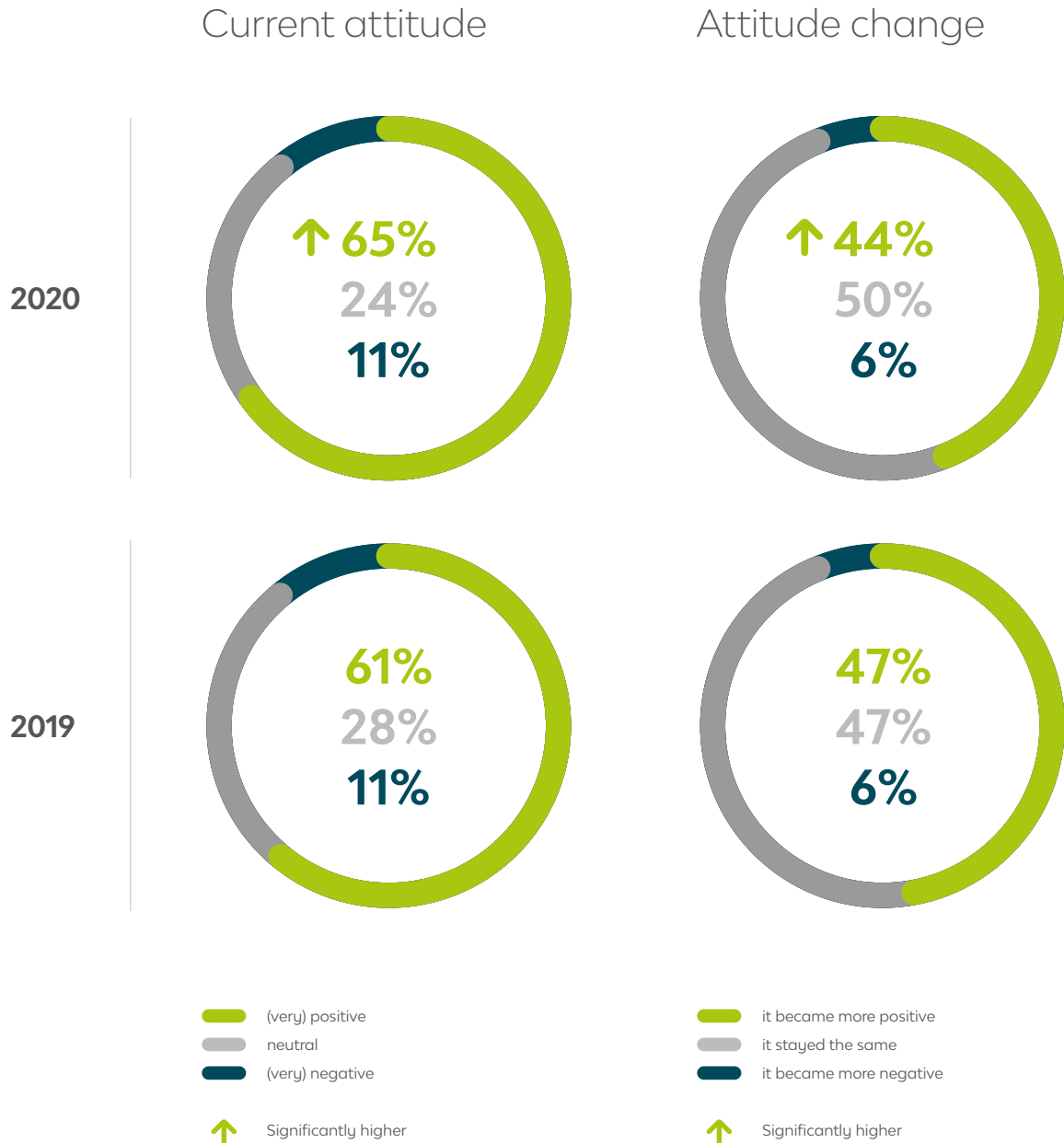


Chapter 1

Attitudes towards EVs

EVs and Sustainability

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

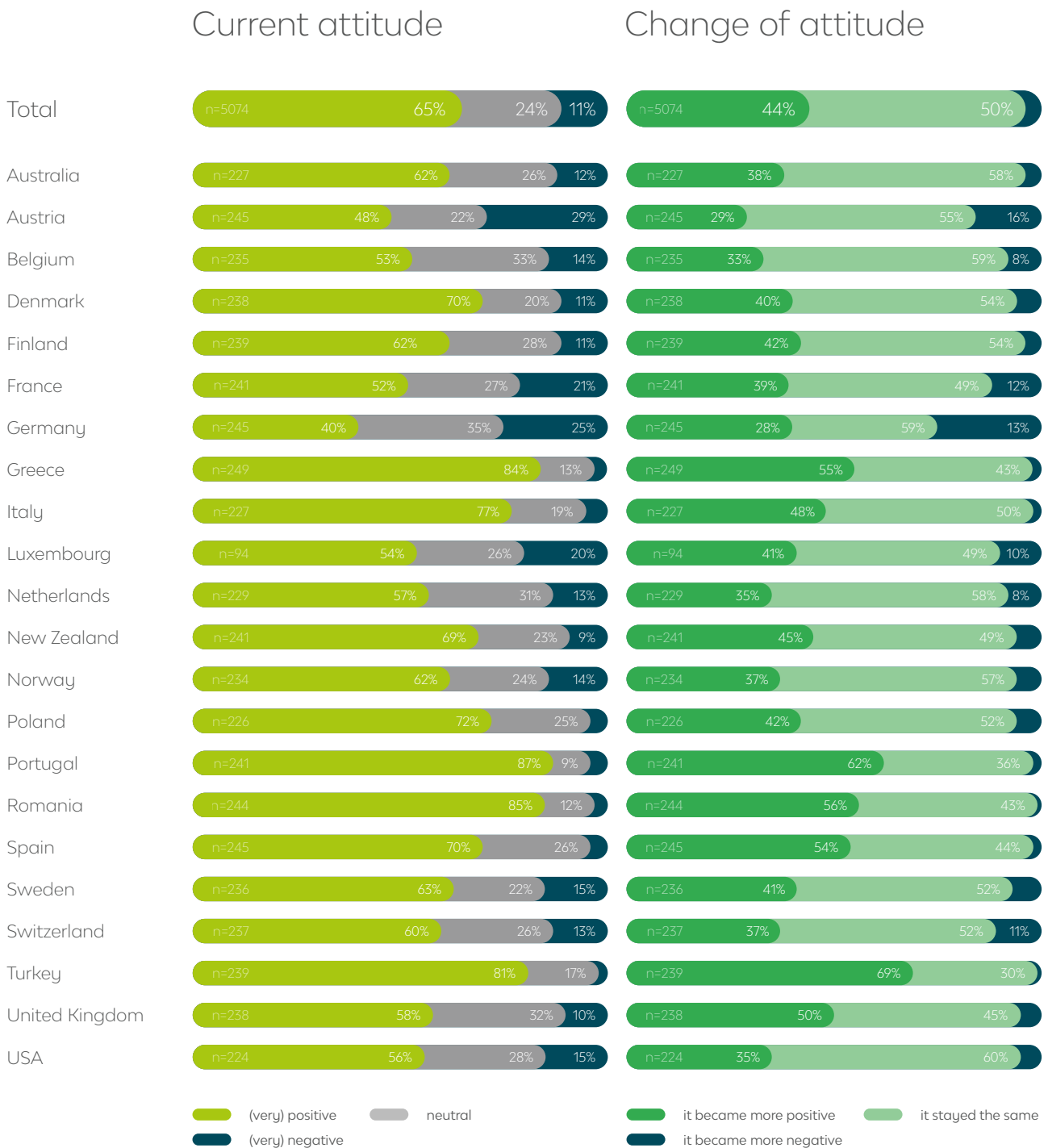


Question: In general, what is your attitude towards electric cars?
Question: Has your attitude towards electric cars changed in the last 3 years?
Base: All respondents (2020 n= 5407 - 5205; n=4047-3876)



EVs and Sustainability

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

EVs and Sustainability

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:



Portugal



Romania



Greece



Turkey



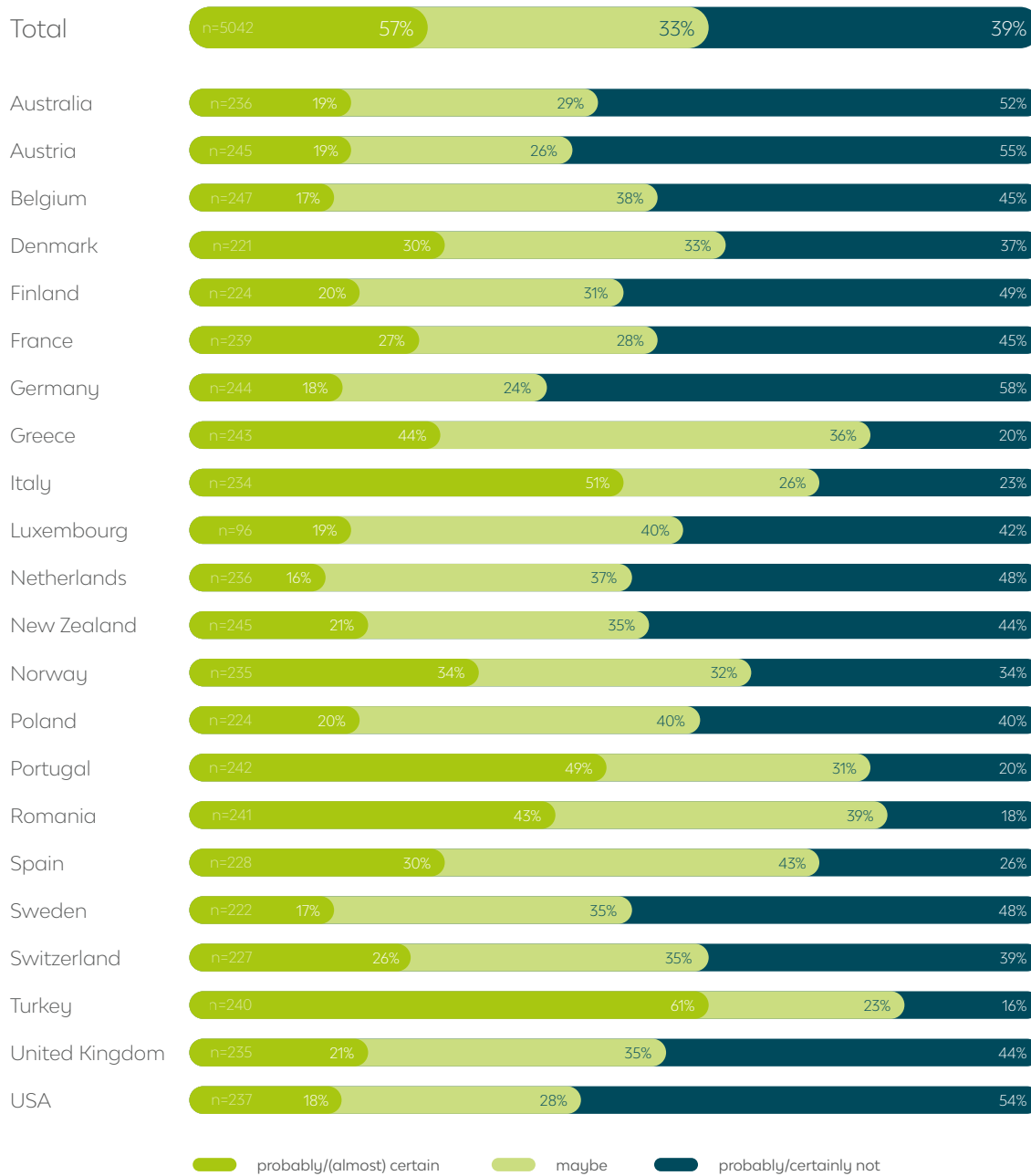
Italy



EVs and Sustainability

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

Intention to buy an electric car



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



EVs and Sustainability

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





Chapter 2

Most popular reasons to go EV

EVs and Sustainability

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

Intention to buy



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)



EVs and Sustainability

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

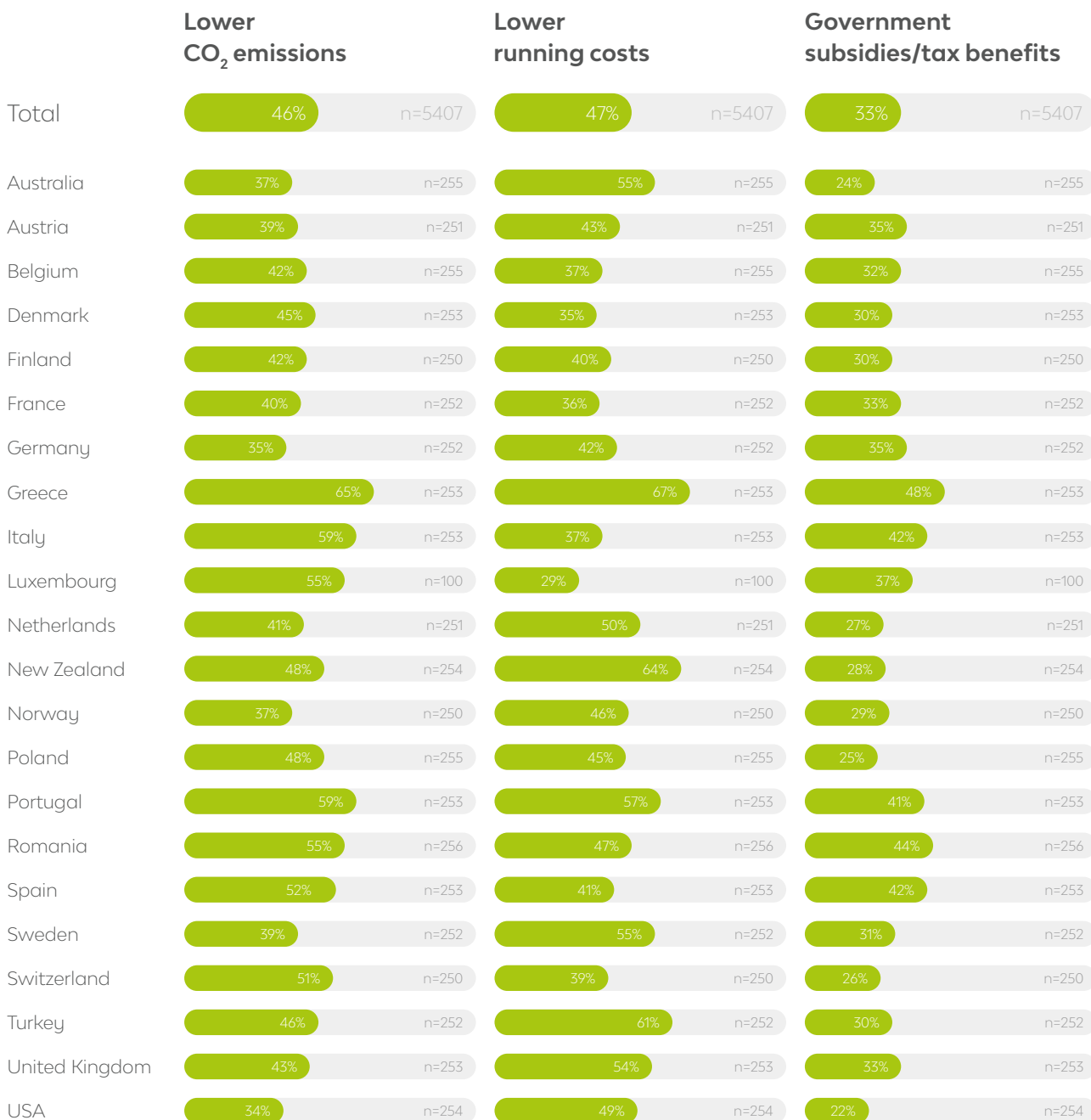
48%

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



EVs and Sustainability

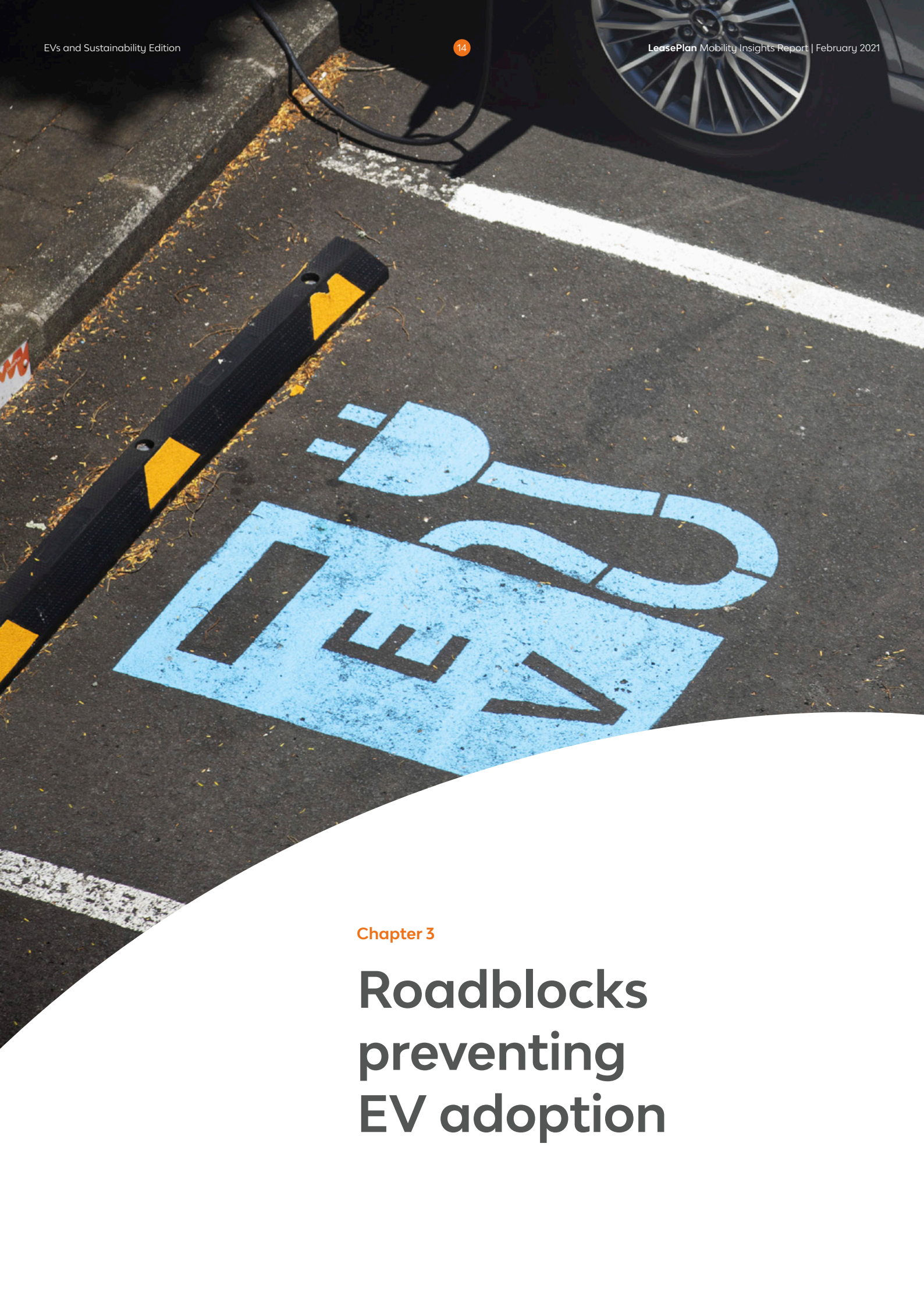
Top 3 reasons to buy or lease an electric car



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)





Chapter 3

Roadblocks preventing EV adoption

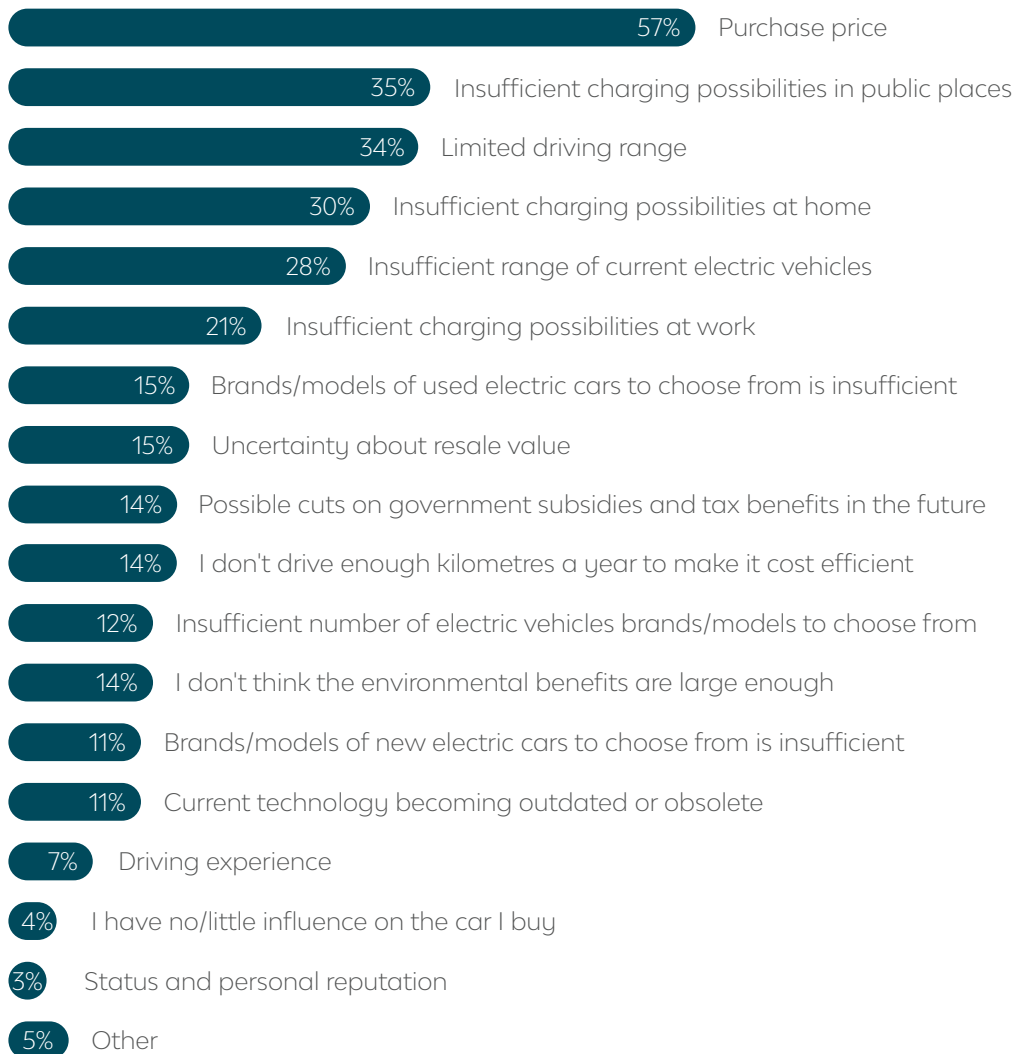
EVs and Sustainability

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

Intention to buy or lease



Reasons not to buy or lease an electric car



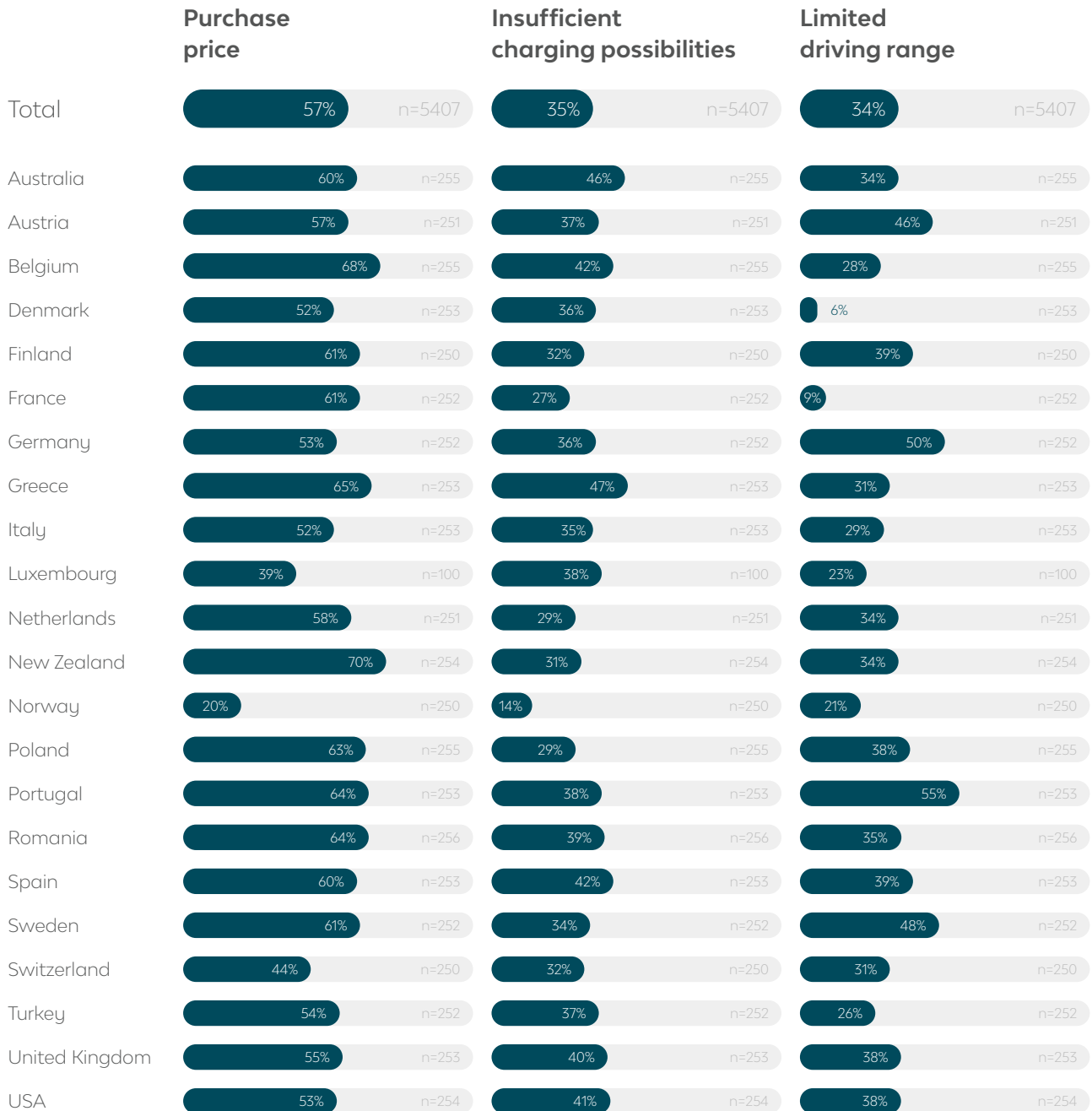
Question: What would be the most important reason(s) preventing you from buying or leasing an electric car as your next car?

Base: Respondents planned to buy a car in the next five years but not an electric car (2020 n=5407)



EVs and Sustainability

Top 3 reasons for not buying an electric car



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)



EVs and Sustainability

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



 (strongly) disagree  (strongly) agree

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

EVs and Sustainability

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



■ (strongly) agree ■ (strongly) disagree

Question: To what extent do you believe the following statements will have become true by 2030?

Base: All respondents (n=5407)



EVs and Sustainability

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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