



LeasePlan

**Mobility Monitor 2019:
EVs and Sustainability**

LeasePlan Corporation N.V.

October 2019

Mobility Monitor 2019

EVs and Sustainability

- The LeasePlan Mobility Monitor is an annual survey of people's opinion regarding the most important subjects facing the industry, produced in partnership with leading research firm Ipsos
- The survey is conducted across **16 countries** internationally, including: Belgium, Denmark, France, Germany, Greece, Italy, Luxembourg, the Netherlands, Poland, Portugal, Romania, Spain, Sweden, Turkey, the United Kingdom and the United States
- This year, the survey is divided into three separate editions: 1) **EVs and Sustainability**, 2) **Used Cars**, and 3) **the Future of Mobility**, which will be released before the end of the year
- This first edition analyses public opinion regarding electric driving and zero-emission mobility, as well as the biggest barriers stopping drivers from starting electric





Key Findings

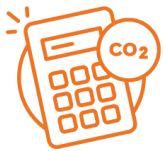
Mobility Monitor 2019 | EVs and Sustainability



A surge in positive attitude towards electric driving, with 61% of respondents indicating that they view zero-emission electric driving favourably. Nearly half of all surveyed said that their opinion towards electric driving has favourably improved over the past three years



An increasing amount of respondents declared their intent to lease an electric vehicle. Among those planning on leasing a car in the next 5 years, two in five (40%) say they will choose an electric vehicle



The benefits of electric driving are increasingly clear: EVs contribute to fighting climate change through lower CO₂ emissions (according to 60% of those planning to go electric in the next five years); help improve air quality in towns and cities through lower NO_x emissions (43%); and have an overall lower running cost (60%)

Part 1:

Attitude Towards Fuel Types



Electric Cars

Attitude towards electric cars



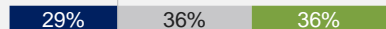
■ (very) negative ■ neutral ■ (very) positive

Change of attitude

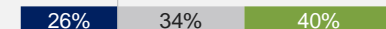


■ more negative ■ stayed the same ■ more positive

Intention to buy

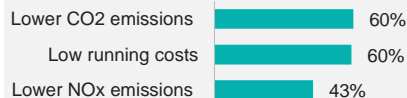


Intention to lease

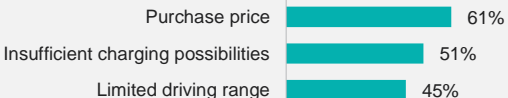


■ probably/certainly not ■ maybe ■ probably/(almost) certain

Reasons to buy



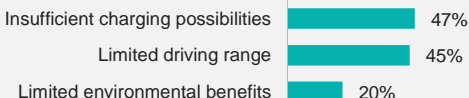
Reasons not to buy



Reasons to lease



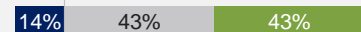
Reasons not to lease



The attitude towards electric cars is overall positive and has become more positive in the last three years. Of the people who intend to buy a car, a third plans to buy an electric car and amongst the people who plan to lease a car, this is even higher. The main reasons for both groups are the same: lower CO2 emissions, lower running costs and lower NOx emissions. Common reasons not to buy or lease an electric car are the insufficient charging possibilities and the limited driving range.

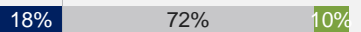
Petrol Cars

Attitude towards petrol cars



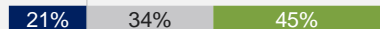
■ (very) negative ■ neutral ■ (very) positive

Change of attitude

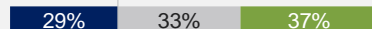


■ more negative ■ stayed the same ■ more positive

Intention to buy

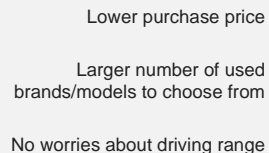


Intention to lease

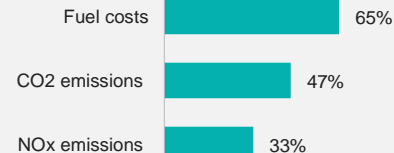


■ probably/certainly not ■ maybe ■ probably/(almost) certain

Reasons to buy



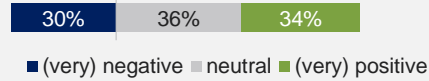
Reasons not to buy



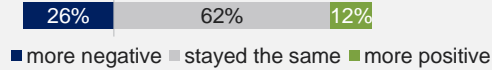
When it comes to petrol cars, the attitude is mainly neutral or positive and this attitude has not changed very much in the last three years. Almost half of the people with the intention to buy a car say this (probably) will be a petrol car and this applies for more than a third of those who will lease a car. Main reason to buy a petrol car is the lower purchase price. On the other hand the main reason not to buy a petrol car is also a financial one: the fuel costs.

Diesel Cars

Attitude towards diesel cars



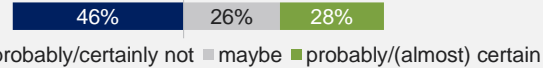
Change of attitude



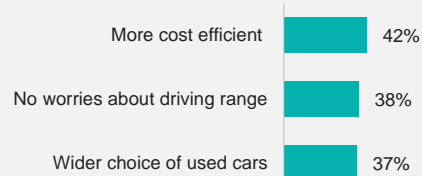
Intention to buy



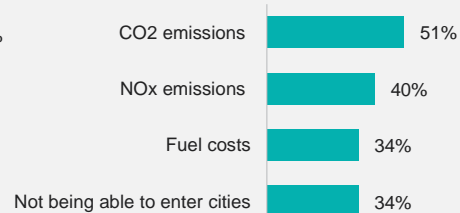
Intention to lease



Reasons to buy



Reasons not to buy



The opinions about diesel cars are strongly divided and for quite a big group it has become more negative in the last three years. Of the people who intend to buy or lease a car, less than a third say it will be a diesel car and for almost half of the people it (certainly) will not be a diesel car. Environmentally related arguments are mentioned most for this, but also fuel costs and not being able to enter cities (in the future) are reasons not to buy a diesel car.

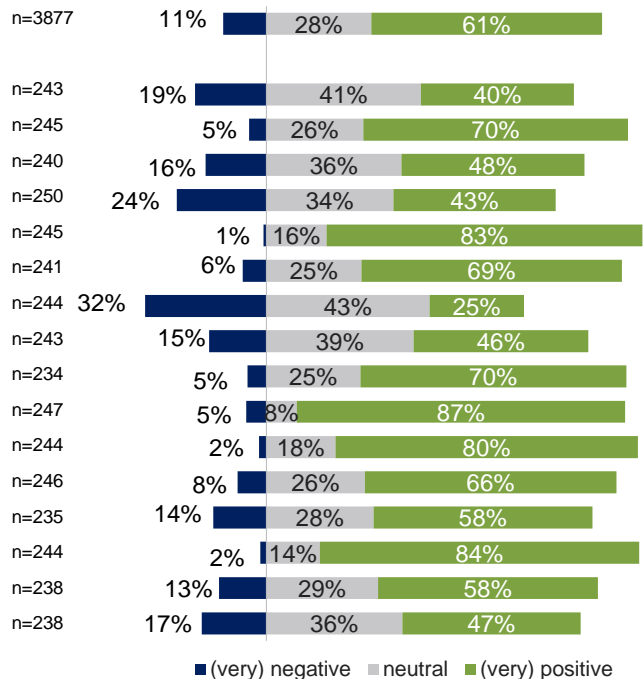
Part 2:

Attitude Towards Electric Cars

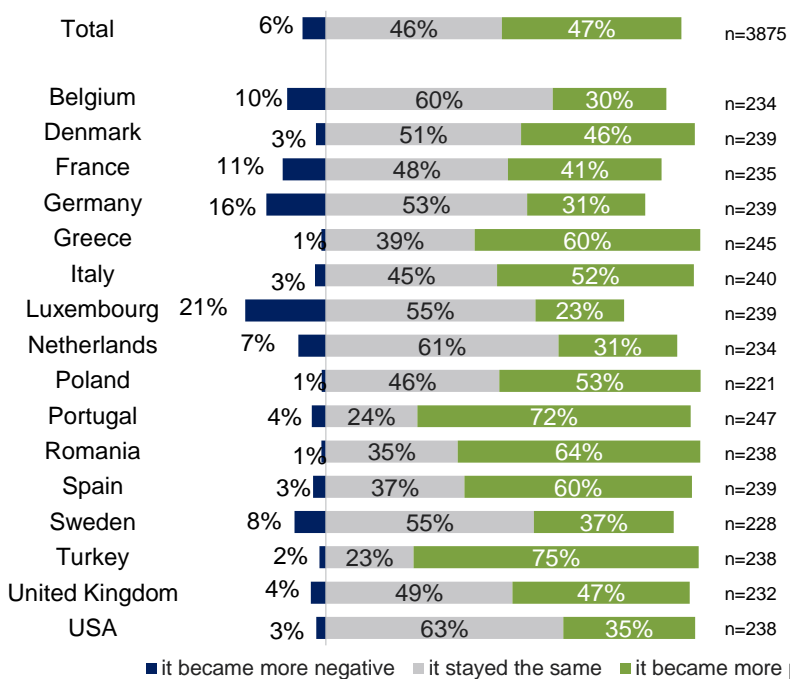
Most people have a positive attitude towards electric cars and this attitude has become more positive in the last three years



Current attitude



Change of attitude



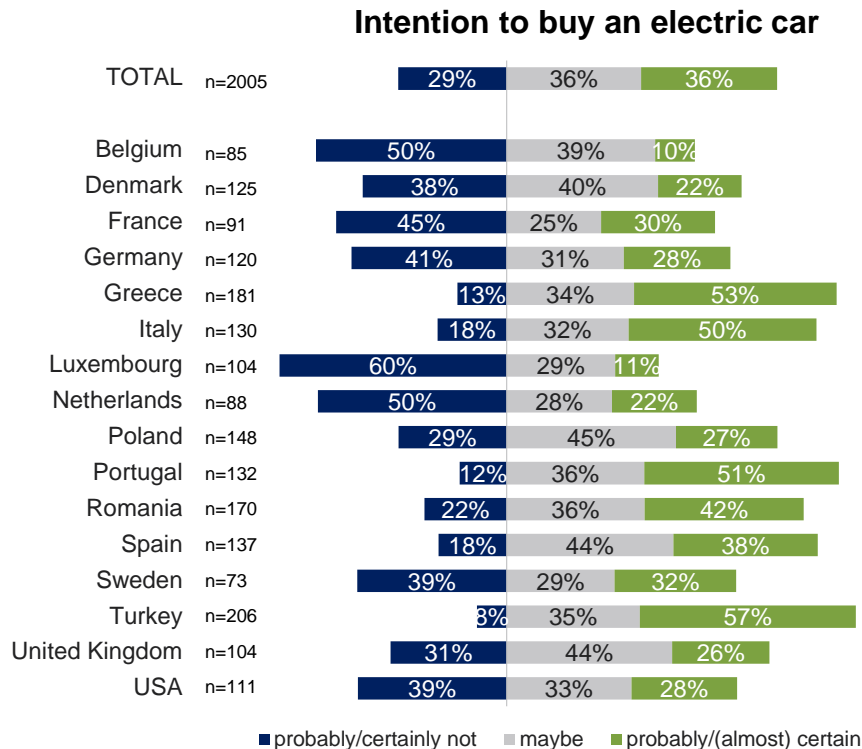
- Drivers from Portugal, Turkey and Greece are the most positive about electric cars
- When comparing all countries, drivers from Luxembourg are the most negative about electric cars. They also indicate quite often that their attitude became more negative in the last three years

B1) In general, what is your attitude towards electric cars?

B2) Has your attitude towards electric cars changed in the last three years?

Base: all respondents (n=3875-3877)

More than a third of the people who plan to buy a car will probably or (almost) certainly buy an electric car



- In Turkey, Greece and Portugal drivers have the highest intention of buying an electric car as their next car. This is in line with their attitude towards electric cars
- In Luxembourg people have the lowest intention of buying an electric car. This also corresponds to their attitude towards electric cars

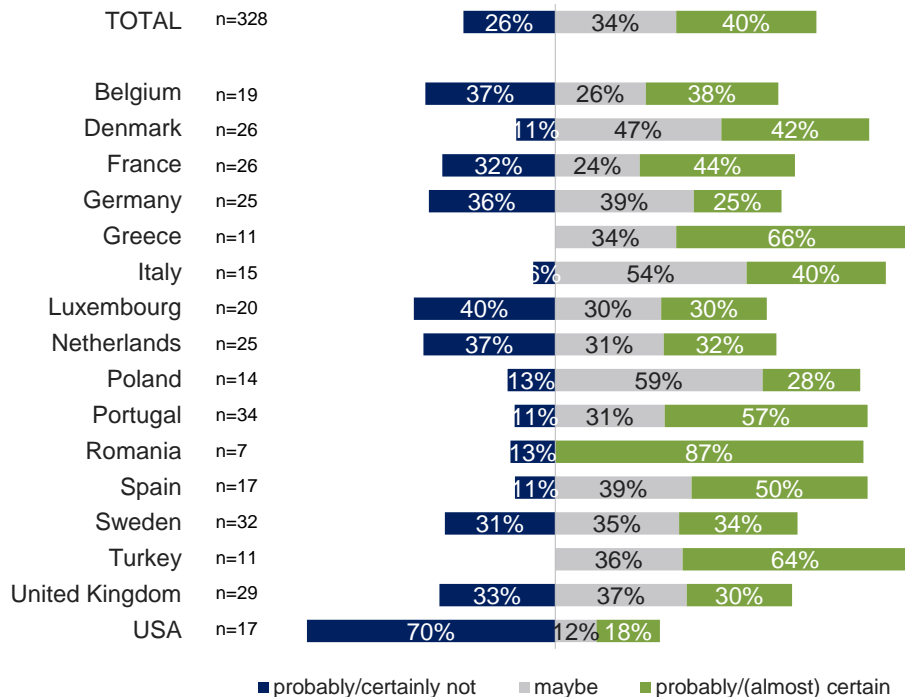
B3) How likely are you to buy an electric car as your next car?

Base: respondents planned to buy a car in the next five years (n=2005)

Of the people who plan to lease a car in the near future, two out of five have the intention of leasing an electric car

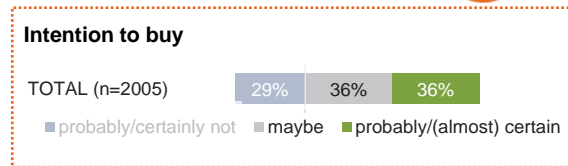
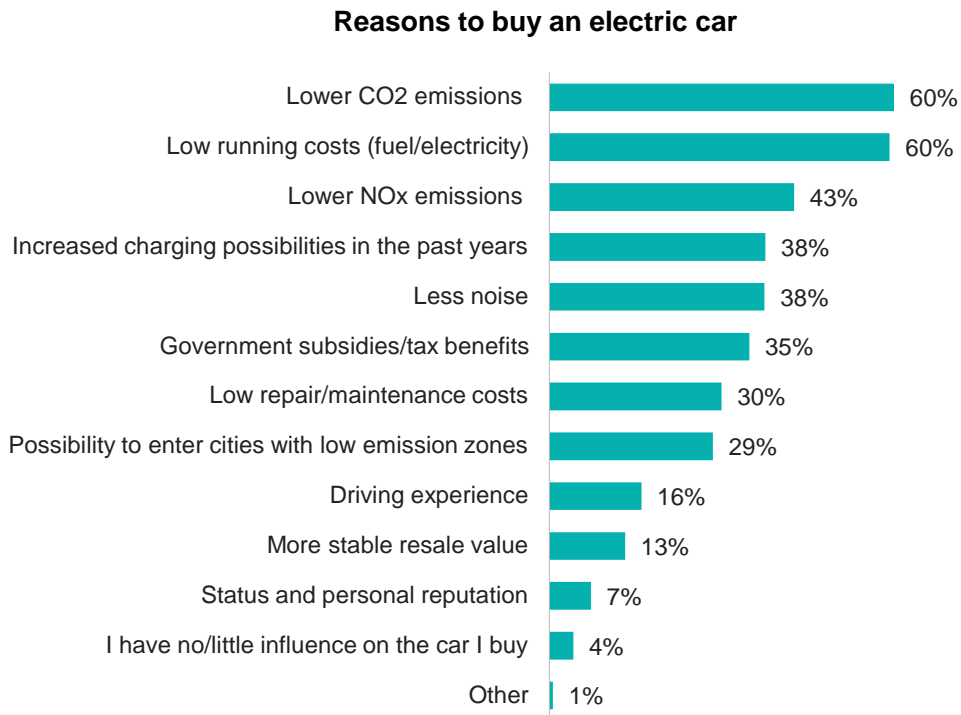


Intention to lease an electric car



B4) How likely are you to lease an electric car as your next car?
 Base: respondents planned to lease a car in the next five years (n=328)

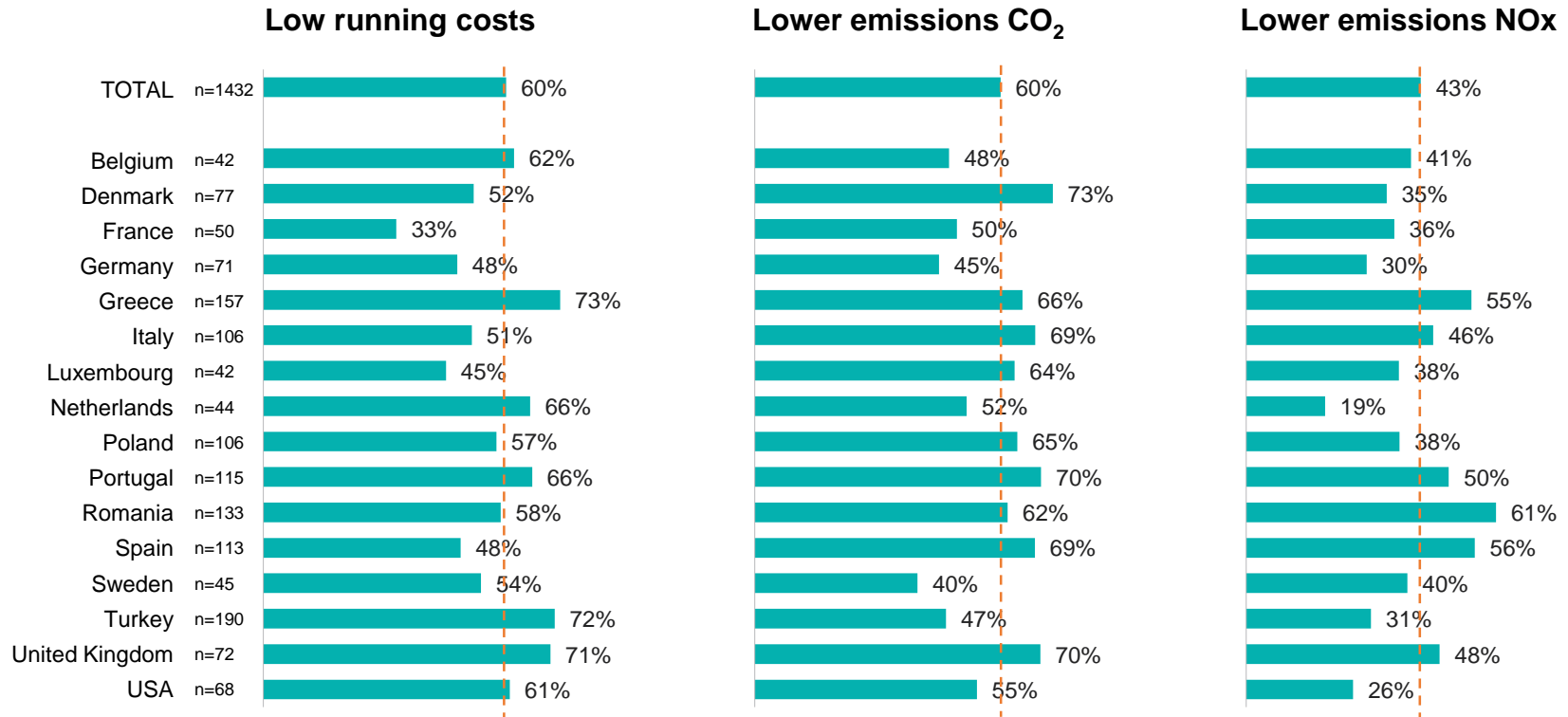
Lower CO₂ emissions and low running costs are the main reasons why people would buy an electric car



B5) What would be the most important reason(s) for you to buy an electric car as your next car (instead of a diesel or petrol car)?

Base: respondents planned to buy an electric car in the next five years (n=1432)

Top three reasons to buy an electric car (per country)



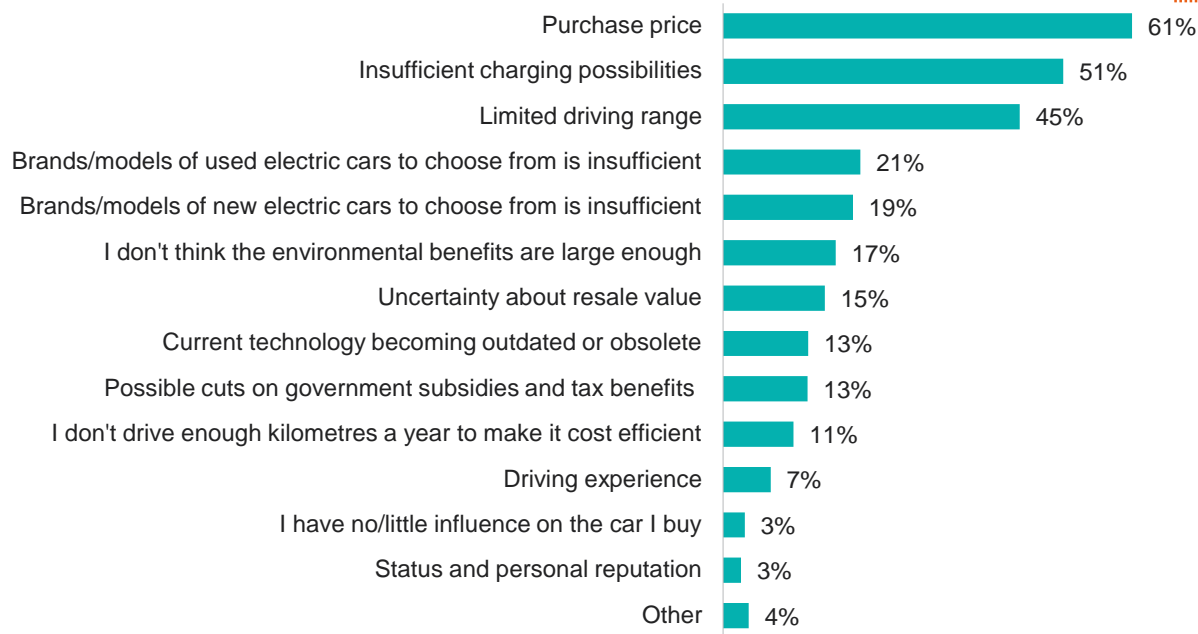
B5) What would be the most important reason(s) for you to buy an electric car as your next car (instead of a diesel or petrol car)?

Base: respondents planned to buy an electric car in the next five years (n=1432)

The purchase price, insufficient charging possibilities and limited driving range are the main reasons why people would not buy an electric car

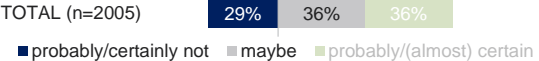


Reasons not to buy an electric car



Intention to buy

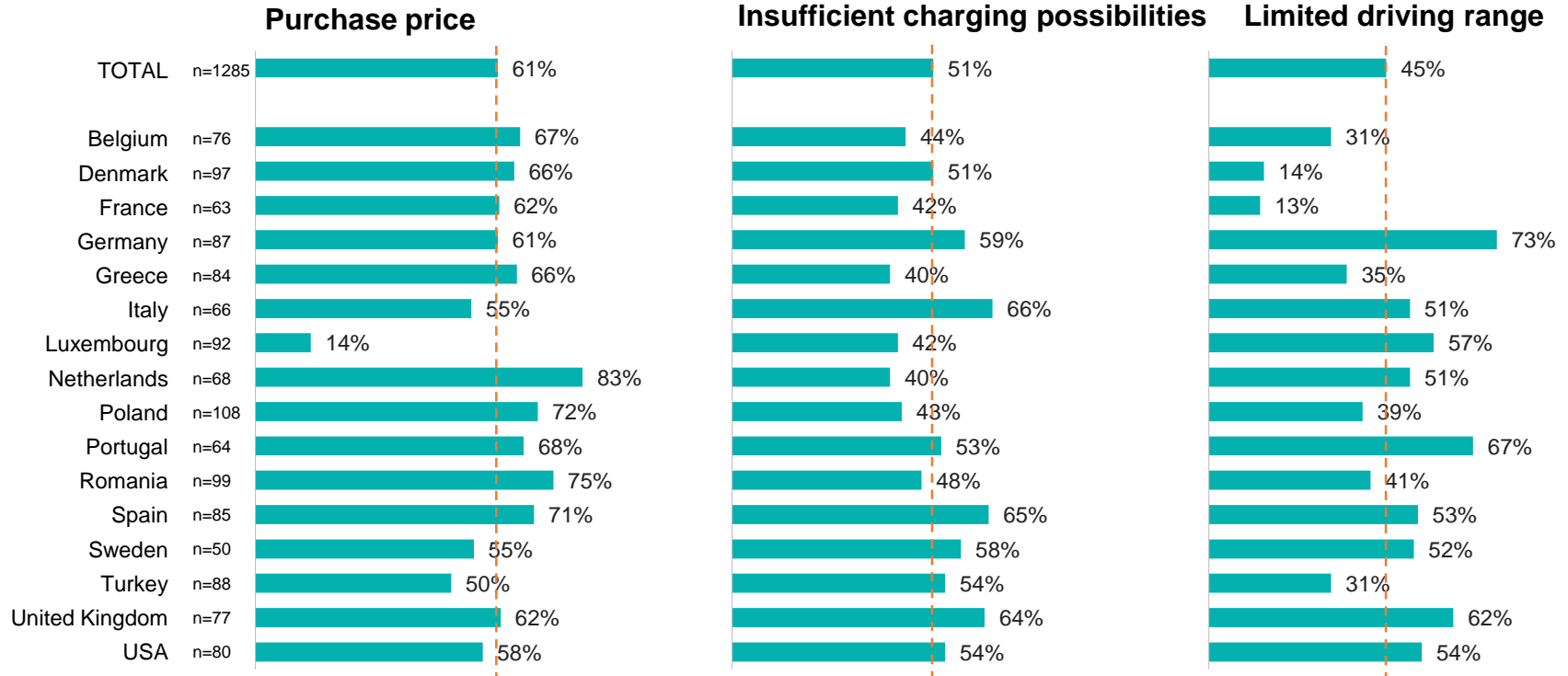
TOTAL (n=2005)



B6) What would be the most important reason(s) preventing you from buying an electric car as your next car?

Base: respondents planned to buy a car in the next five years but not an electric car (n=1285)

Top three reasons for not buying an electric car (per country)

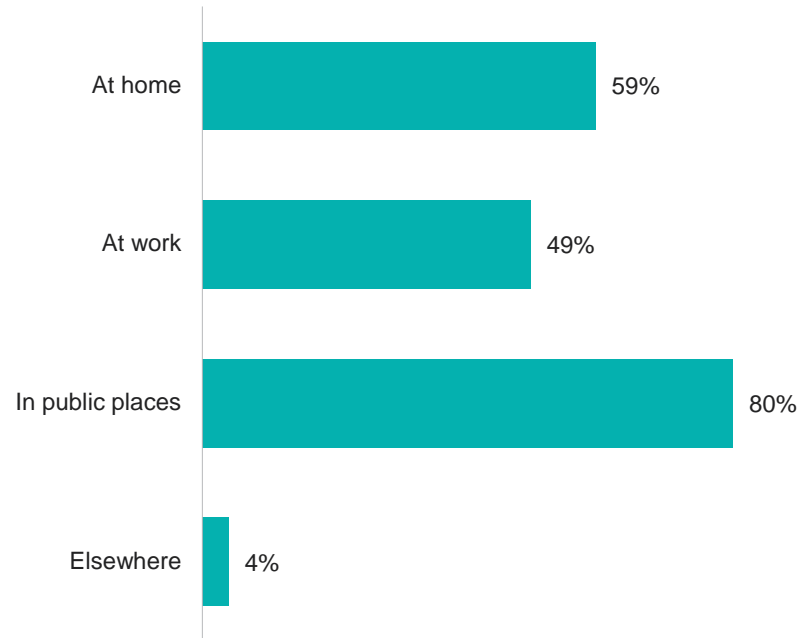


B6) What would be the most important reason(s) preventing you from buying an electric car as your next car?
 Base: respondents planned to buy a car in the next five years but not an electric car (n=1285)

The majority of the people who do not buy an electric car because of insufficient charging possibilities, mainly think there are too few charging possibilities in public places



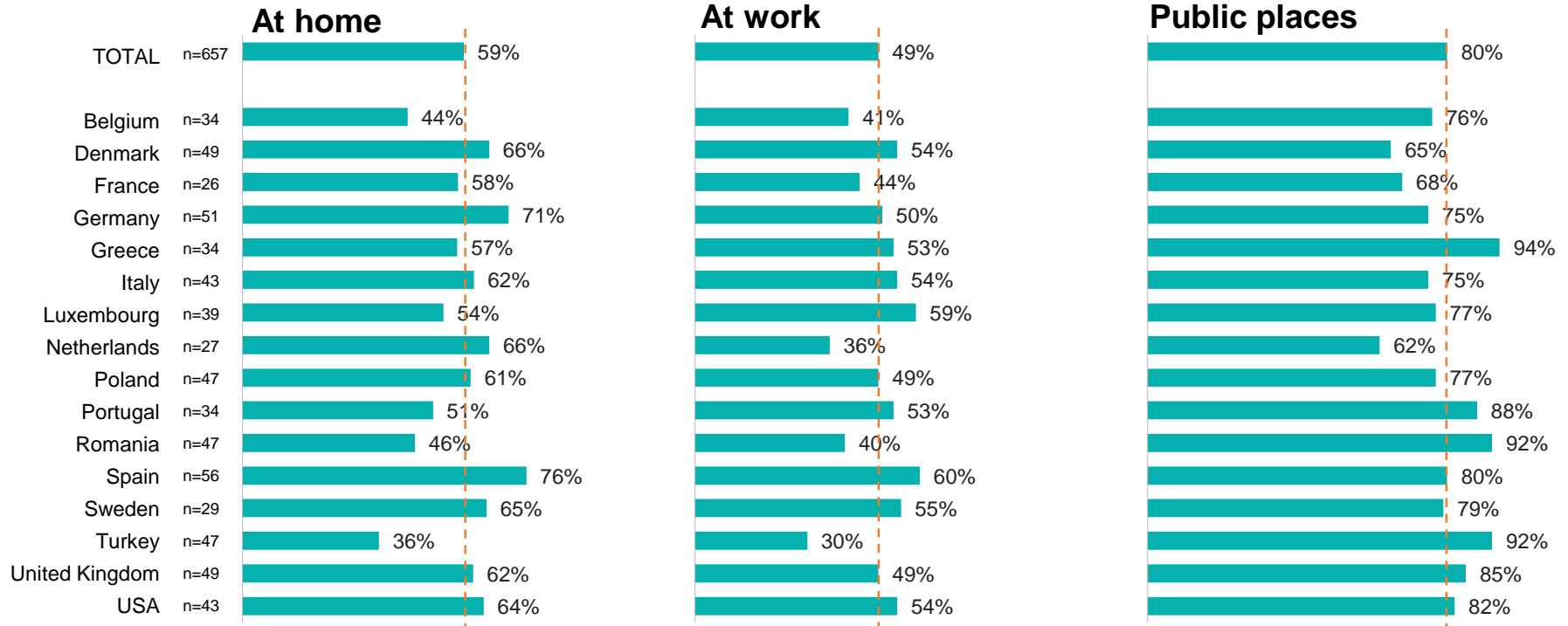
Insufficient charging possibilities



B7) Where do you have insufficient charging possibilities?

Base: respondents planned to buy a car in the next five years but not an electric car because of the insufficient charging possibilities (n=657)

People in all countries think that there are insufficient charging possibilities in public places. Charging possibilities at work differ between the countries



B7) Where do you have insufficient charging possibilities?

Base: respondents planned to buy a car in the next five years but not an electric car because of the insufficient charging possibilities (n=657)



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media@leaseplancorp.com

