

COVID-19 Survey

Assessing behaviors and attitudes towards transportation since the onset of Covid-19

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Sustainable
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Purpose of Study

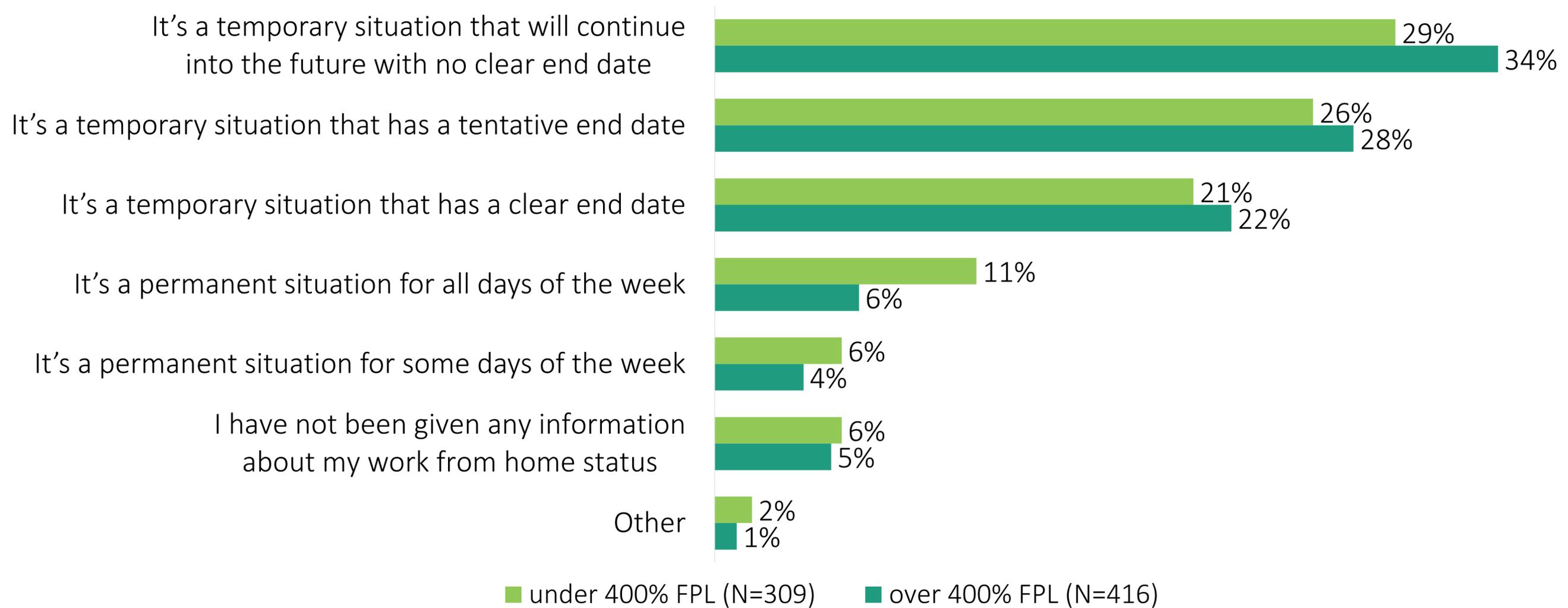
- The spread of COVID-19 and subsequent mandated and voluntary restrictions in activity outside of the home resulted in significant economic impacts and greatly reduced the amount of commuting and other trips
- CSE designed and executed a survey of licensed drivers in California to understand how the swift expansion of remote work and health concerns about the use of public has influenced consumers' views towards transportation options and EVs
- Consumers were asked about their interactions with transportation and vehicle purchasing commencing with the State's Executive Order declaring a statewide emergency that set forth travel and other restrictions
- Survey responses are differentiated between individuals who are under 400% of the Federal Poverty Line and those above to understand how different income levels were influenced by COVID

Survey Administration Summary

Target Population	18 and over licensed drivers in California
Dates of Administration	3/10/2021 thru 4/12/2021
Reponses Collected	2,330
Respondents who reported household income and household size	2,233
Respondent income brackets	At or under 400% FPL: 1,229 (55%) Over 400% FPL: 1,004 (45%)

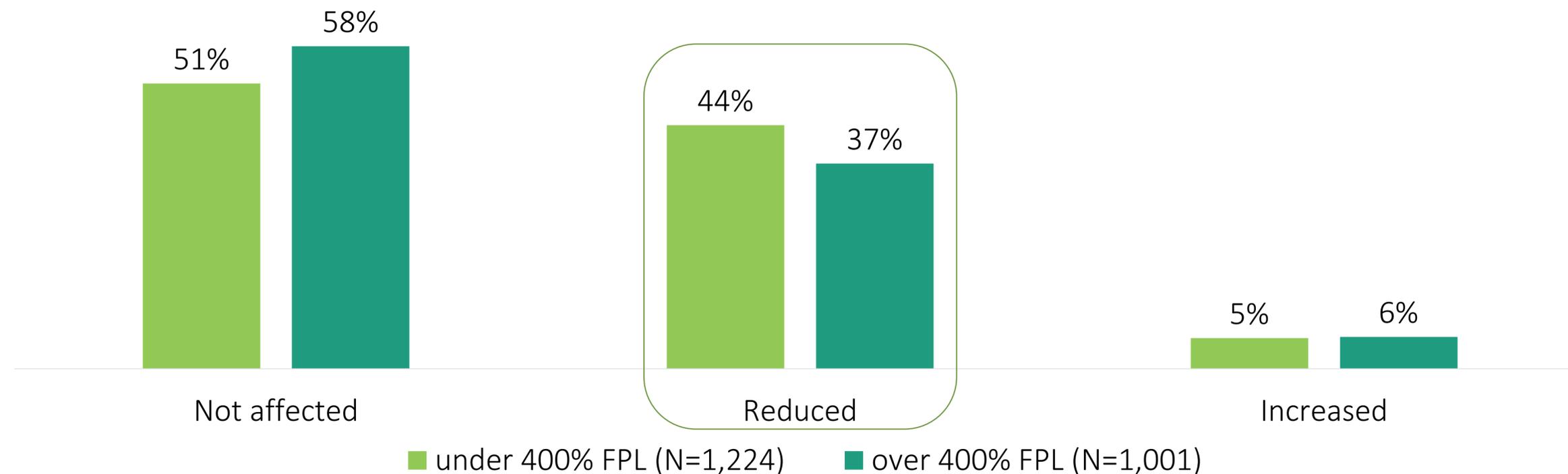
Working Situation During COVID

- Working from home is a **temporary situation** for both income groups



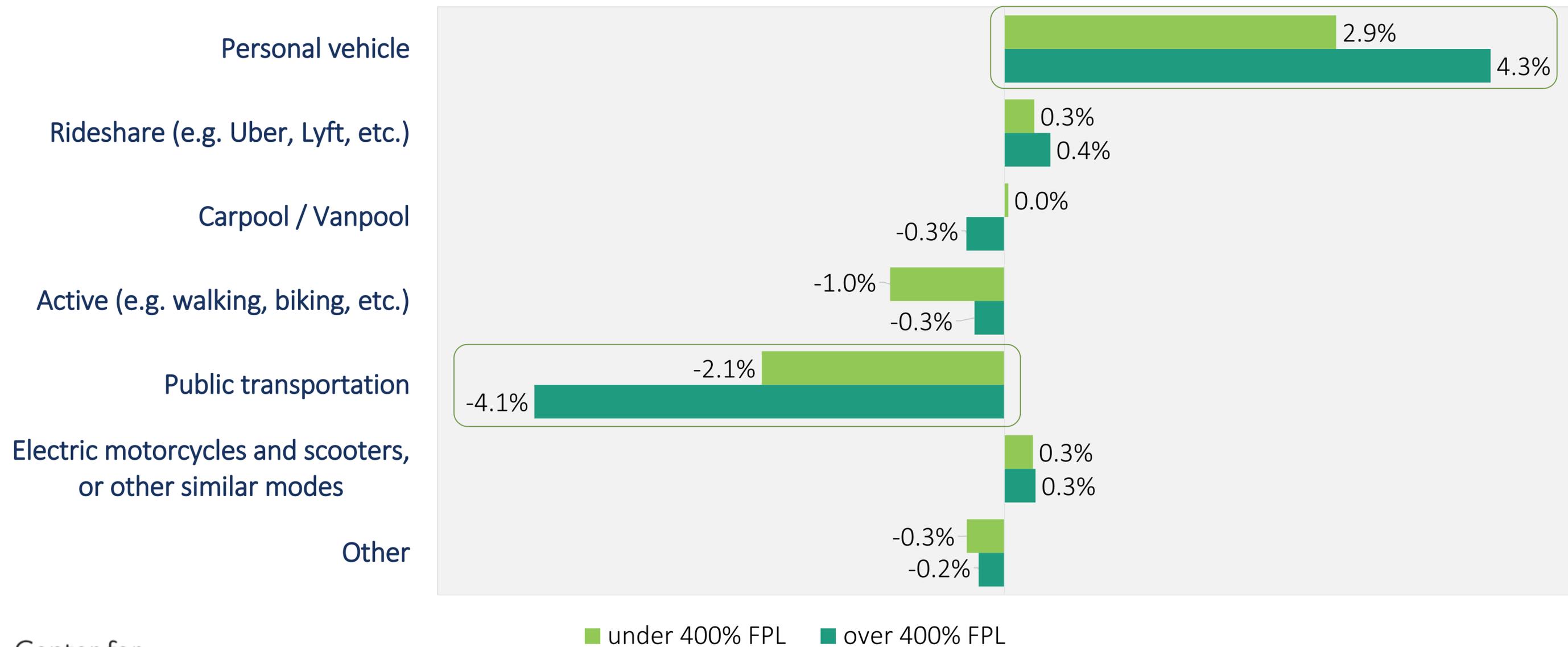
COVID Impact on Household Income

- 40% of all respondents said that their income was **reduced**, with the LMI population more significantly impacted
- 54% of all respondents said that their income was **not affected** during the pandemic



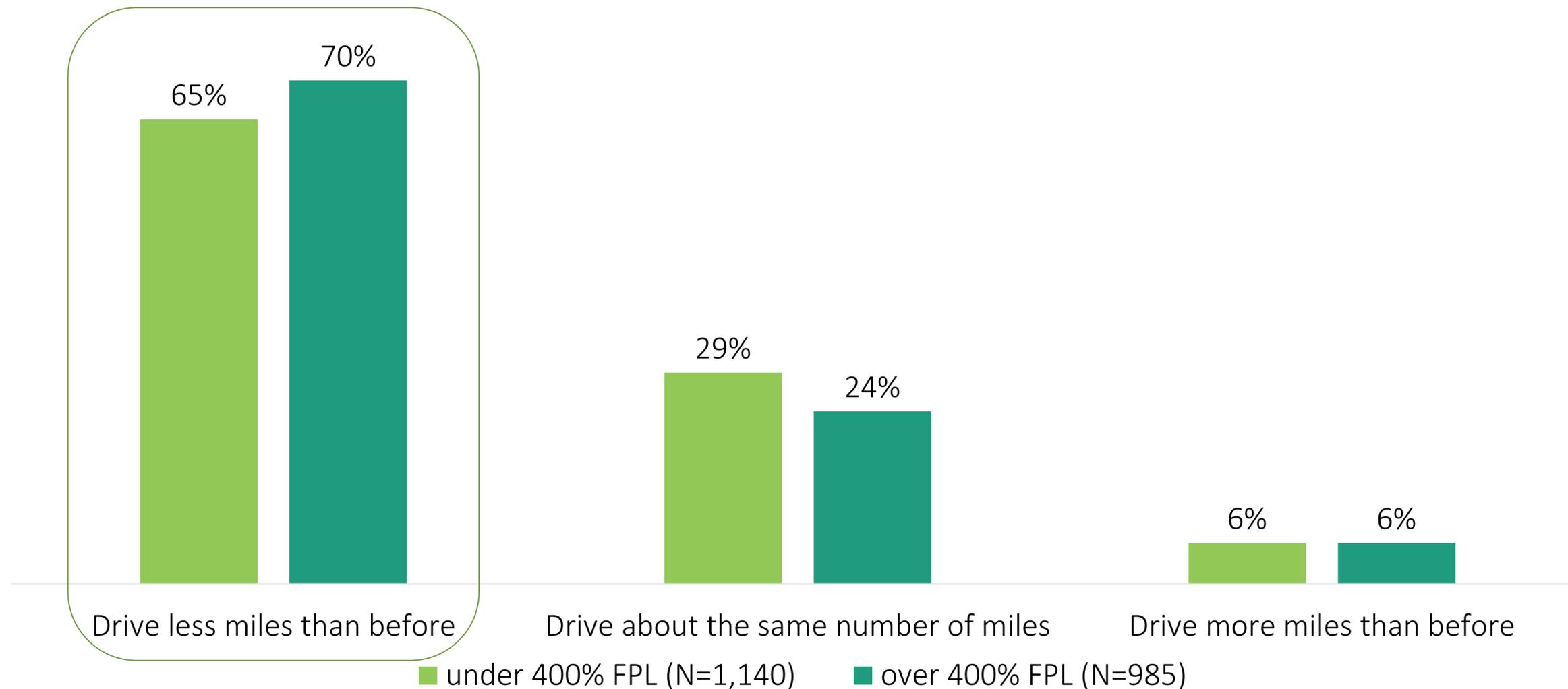
Commuting Changes During COVID

- **Increase** in personal vehicle use is similarly reflected to the **decrease** in use of public transportation



Majority of Respondents Traveled Less During COVID

- Miles driven since the start of the pandemic decreased for all economic groups



Changes in the Frequency of Transportation Choices - LMI

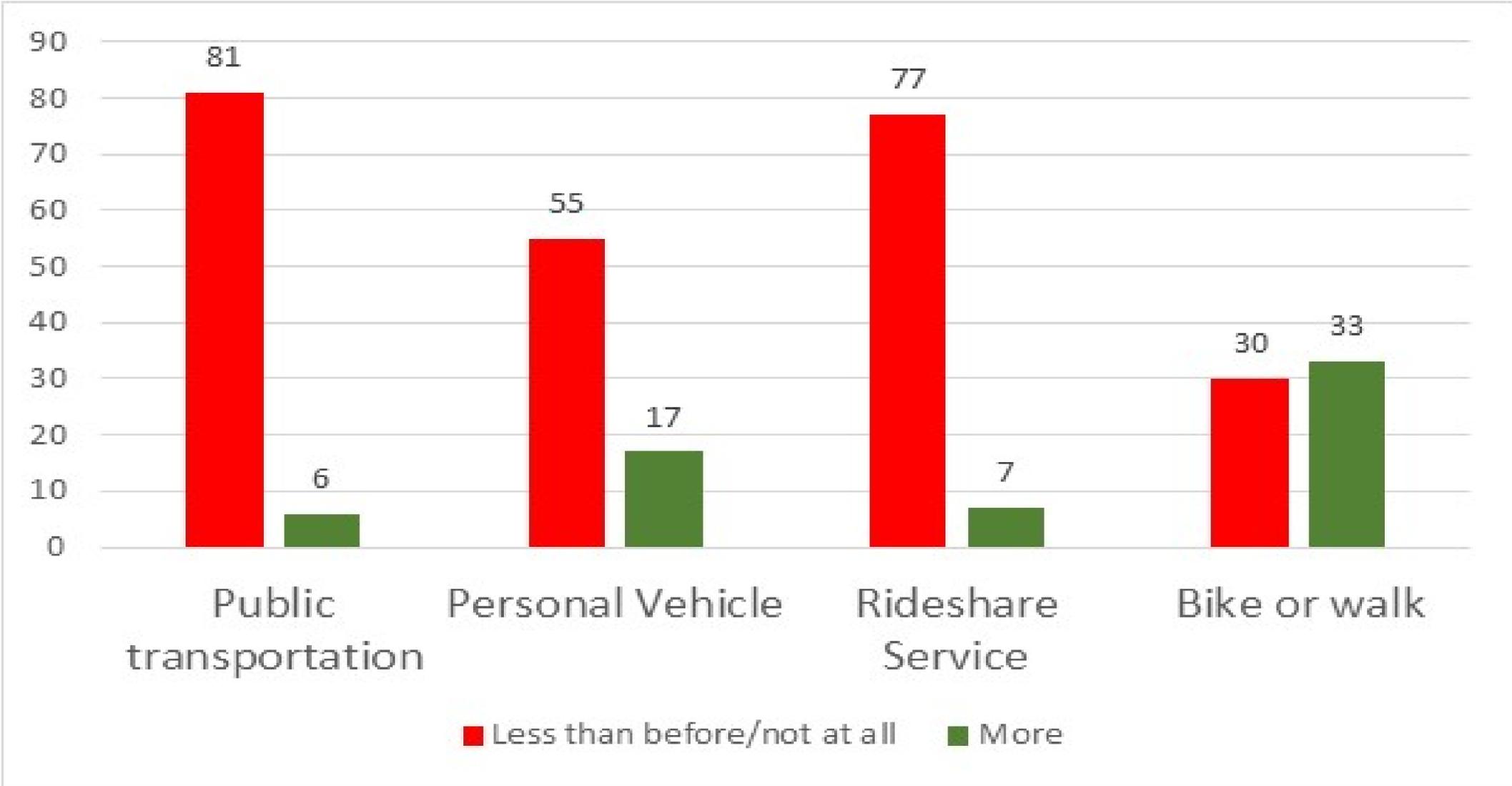
- All modes of motor transportation were less likely to be used during COVID



**Left column (darker colored) of each option represent LMI respondents, right column (lighter colored) represent non-LMI respondents. "Not applicable" and blank responses are excluded.*

Changes in the Frequency of Transportation Choices – Non-LMI

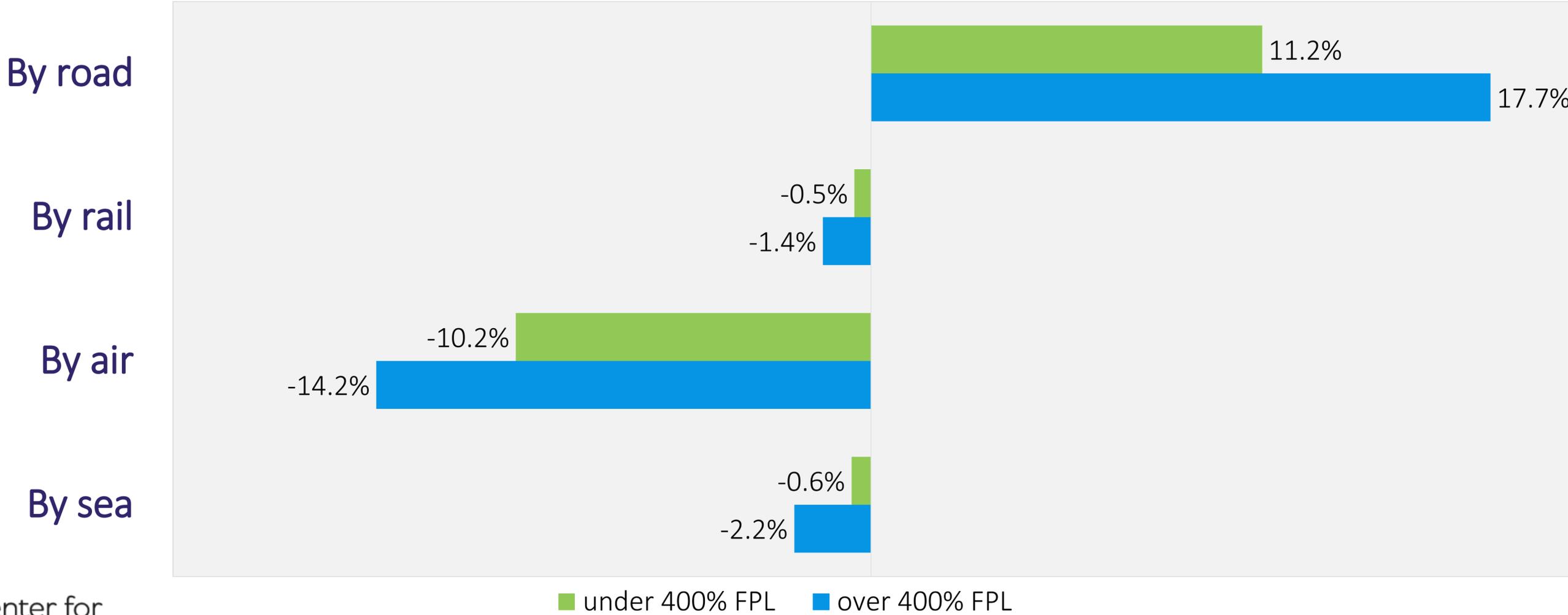
- Non-LMI said they were less likely to continue using public transit and more likely to bike or walk



**Left column (darker colored) of each option represent LMI respondents, right column (lighter colored) represent non-LMI respondents. "Not applicable" and blank responses are excluded.*

Preferred Modes of Travel for Long-distance Trips

- Increase in preference for road travel
- Decrease in preference for air travel



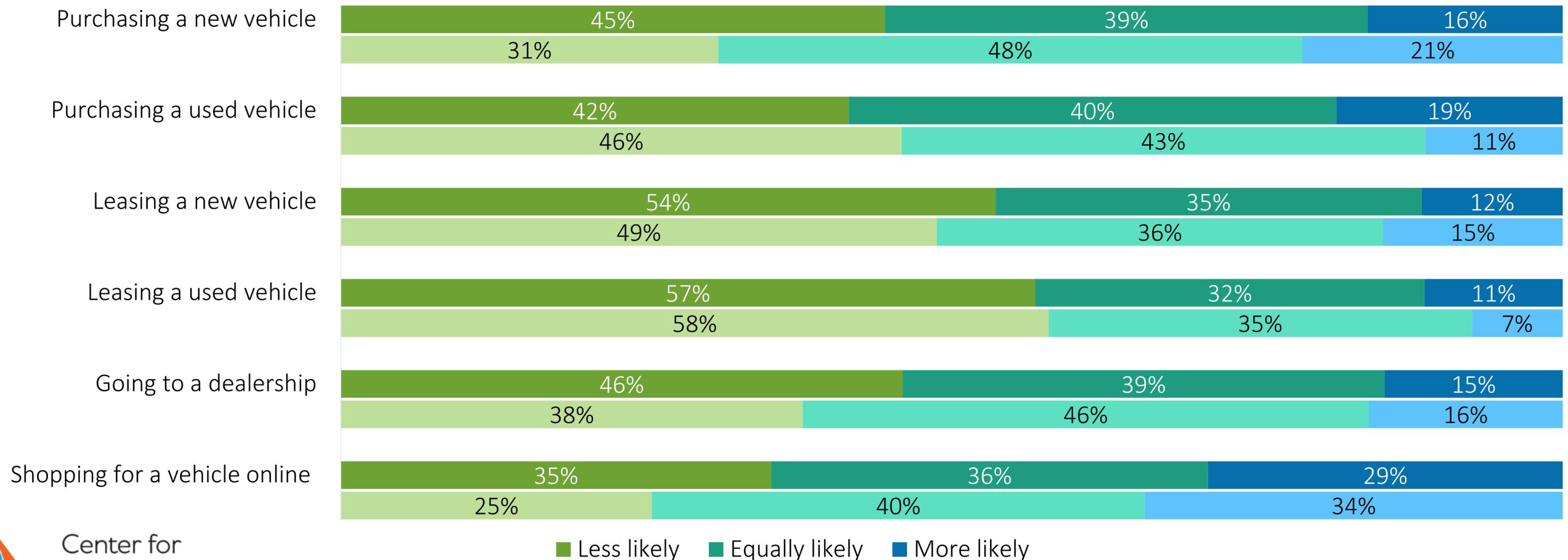
*Before the pandemic, under 400%FPL N=1,484, over 400% FPL N=1,383. During the pandemic, under 400% FPL N=1,212, over 400% FPL N=1,061. Blank responses are excluded.

Vehicle Purchasing Plans During Pandemic

- **45%** of respondents planned to **acquire a vehicle before the pandemic** (N=2,228)
- **29%** of respondents said that the pandemic **affected their plans to acquire a vehicle** (N=2,227)
- Of the group that owned a vehicle before the pandemic and the pandemic changed their plans to acquire another vehicle, **66% decided to delay their purchase** (N=540)
 - Of those that decided to delay their vehicle purchase, **56% of LMI respondents plan to acquire a less expensive vehicle** as compared to **38%** for non-LMI (N=356)

Changes in Vehicle Shopping Preference

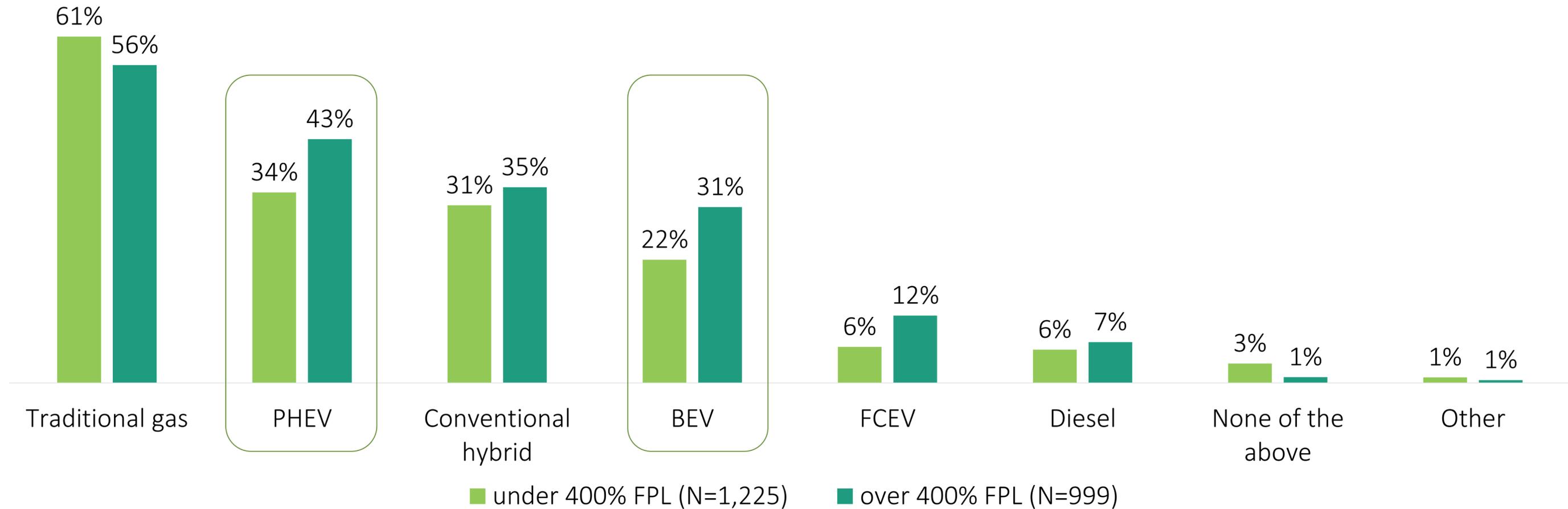
- Almost one-third are more likely to **shop online**, and many want to avoid dealerships



*Upper rows (darker colored) of each option represent LMI respondents, lower rows (lighter colored) represent non-LMI respondents. "Not sure" and blank responses are excluded.

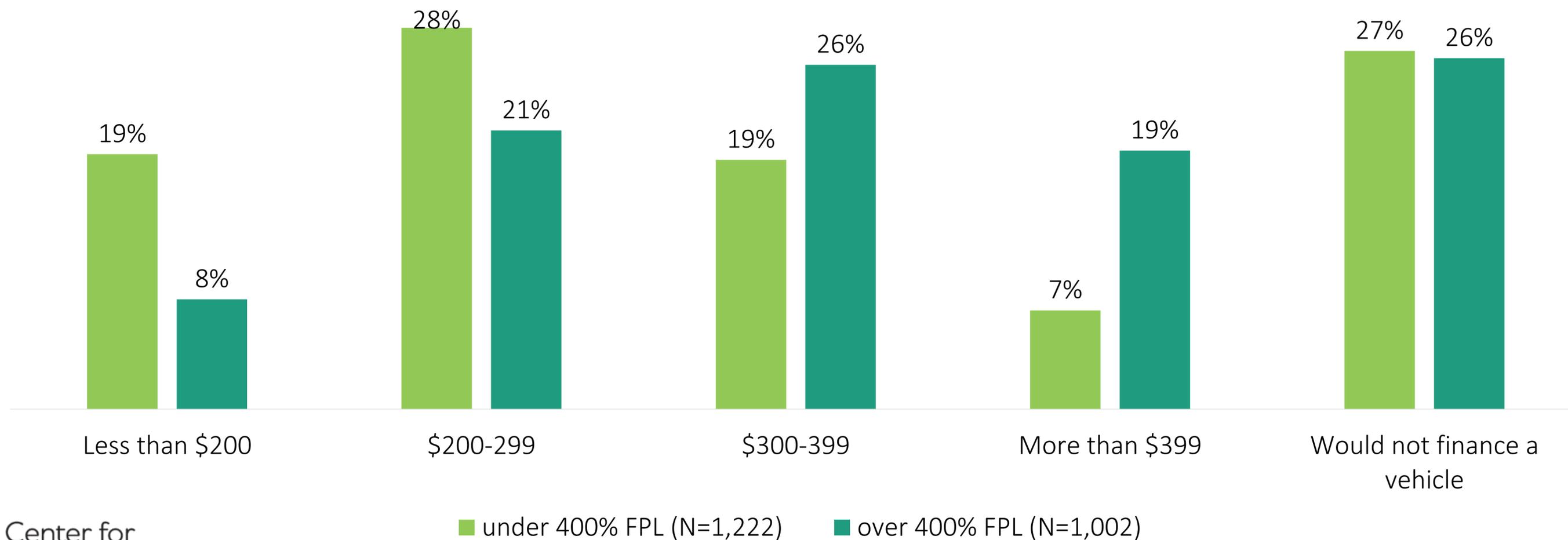
Fuel Type Consideration for Next Vehicle

- PHEV is still preferred over BEV for both LMI and non-LMI



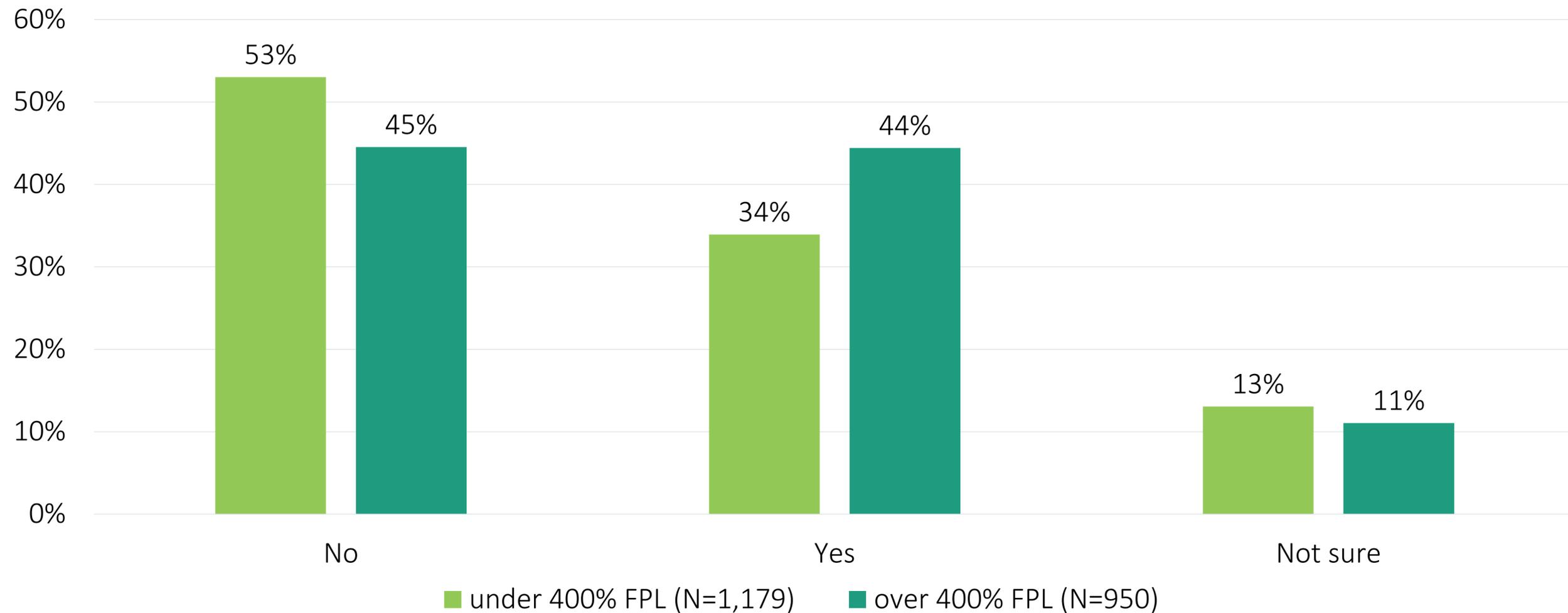
Maximum Monthly Payment for Vehicle Financing

- 47% of LMI respondents said they preferred to spend **less than \$299** monthly
- 71% of non LMI respondents expected to pay **more than \$300** monthly



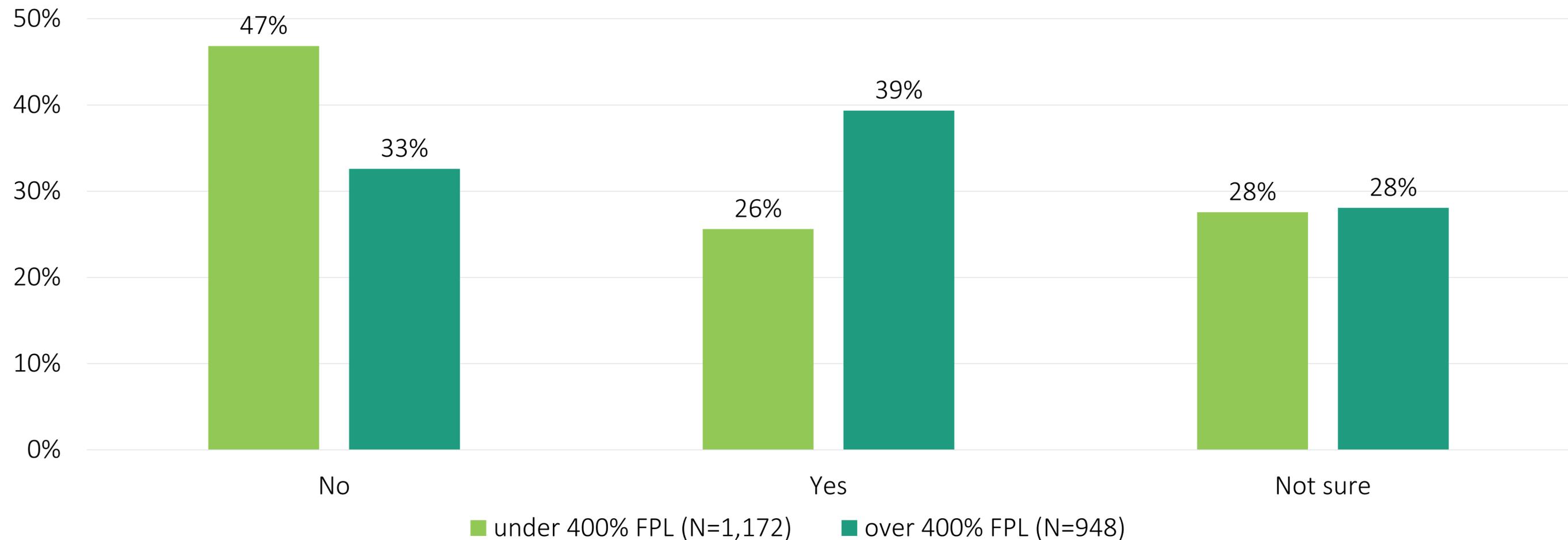
Consideration of BEVs for Next Vehicle (Non-BEV owners)

- **Majority** of LMI population responses said they were **not** going to consider BEV as their next vehicle purchase whereas **non-LMI** population were more likely to consider a BEV



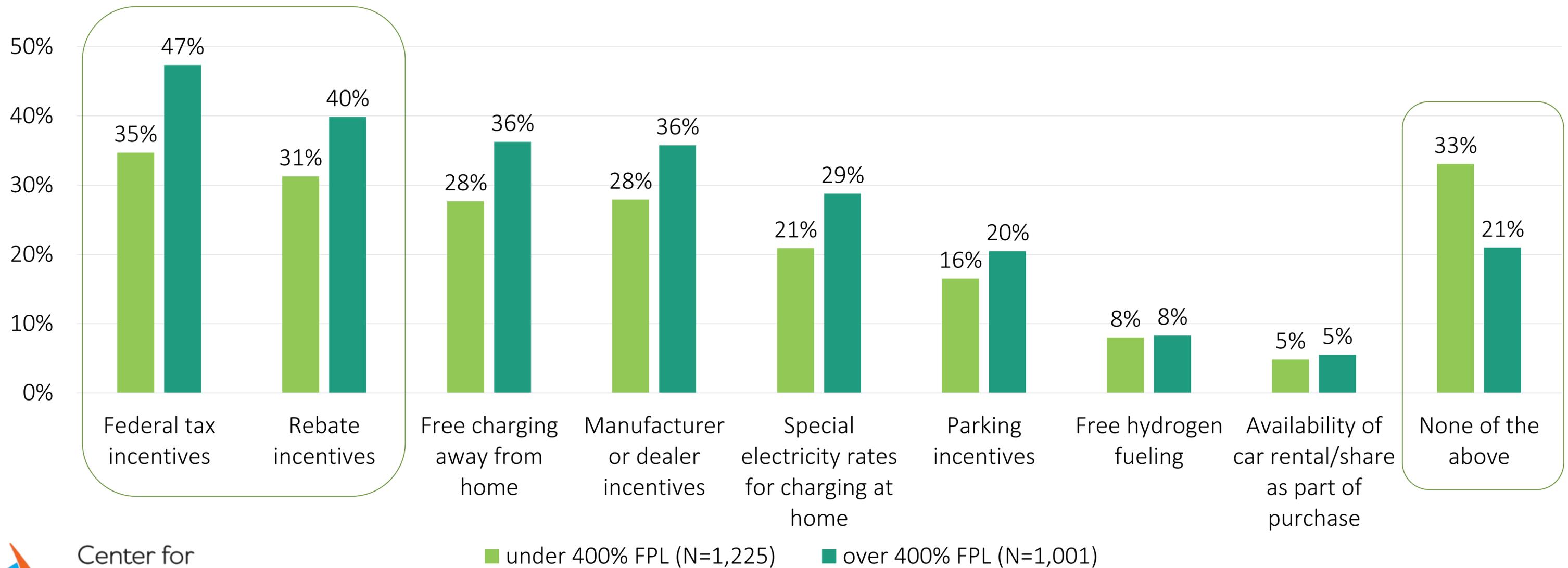
Affordability of Available BEVs (Non-BEV Owners)

- Nearly half of LMI drivers consider current BEV options unaffordable



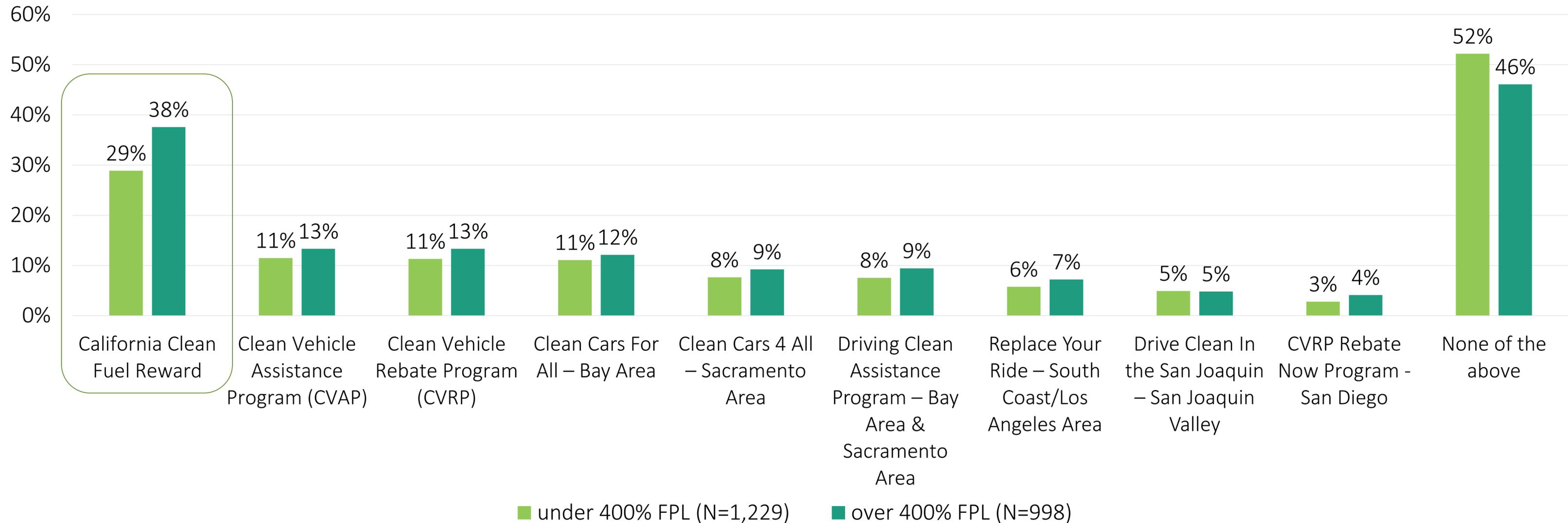
EV Incentive Awareness

- One-third of LMI respondents are **not aware** of the available incentives for adopting EVs
- Non-LMI respondents **are more aware** of available incentives than LMI respondents



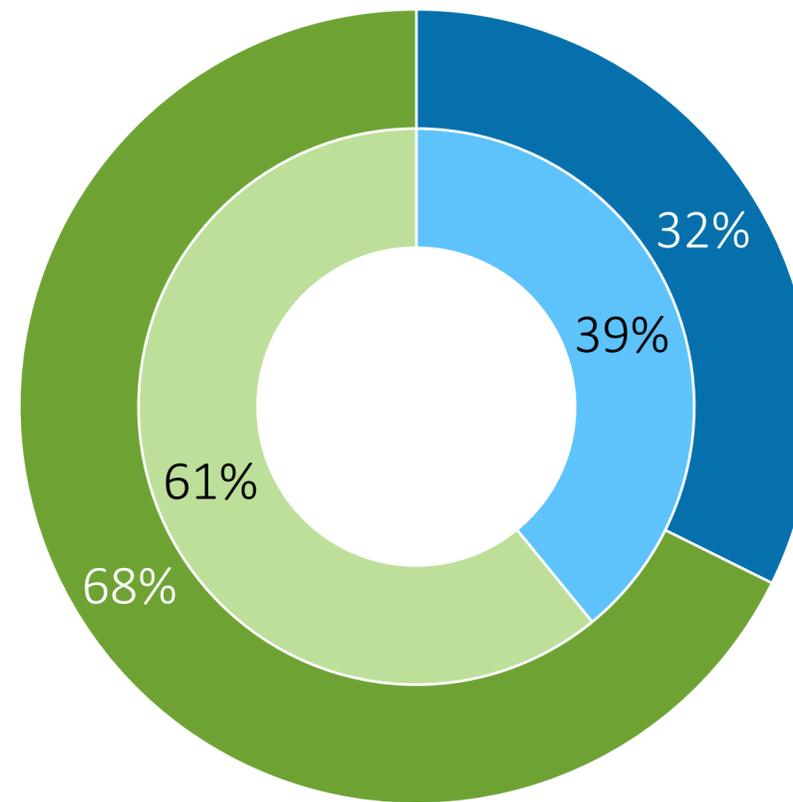
EV Grant or Rebate Awareness

- Respondents are **more aware** of the **California Clean Fuel Reward** program compared to others on the list



Knowledge of Potential to Combine Incentives

- 7% more non-LMI respondents are aware of stackable incentives



■ Yes ■ No

Conclusions

- COVID reduced travel, commuting to work, and air travel, while increasing the use of personal vehicles
 - Decreasing the need for commuting vehicle contrasts with increasing the use of personal vehicle for other travel
- COVID delayed many vehicle purchases which contributed to pent up demand and early 2021 sales surge
- Incentives continue to influence EV purchases
 - Nearly half of the LMI drivers consider current BEV options unaffordable
- Higher income individuals were more likely to consider air quality in transportation choices