

Lessons Learned from Covid's Impact on California's Transportation Market

6/13/2022

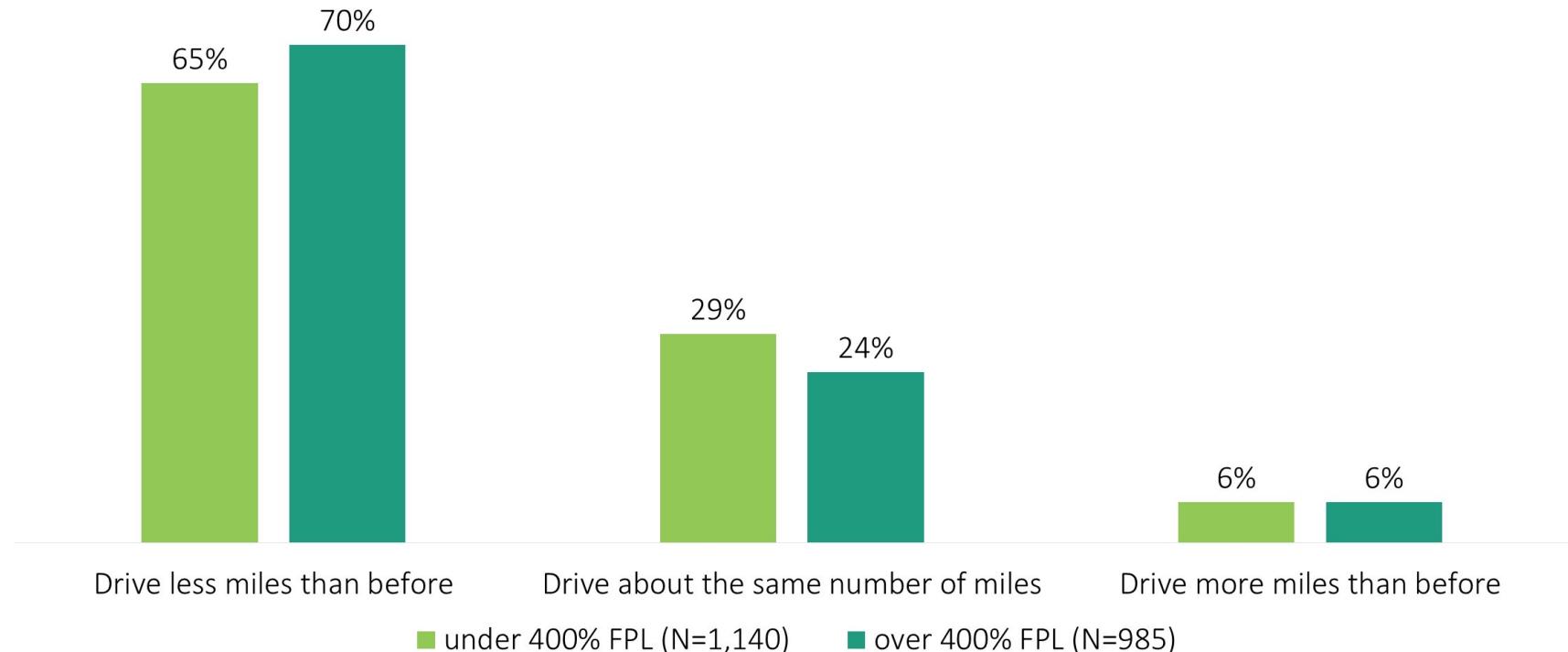
John Gartner, Senior Director



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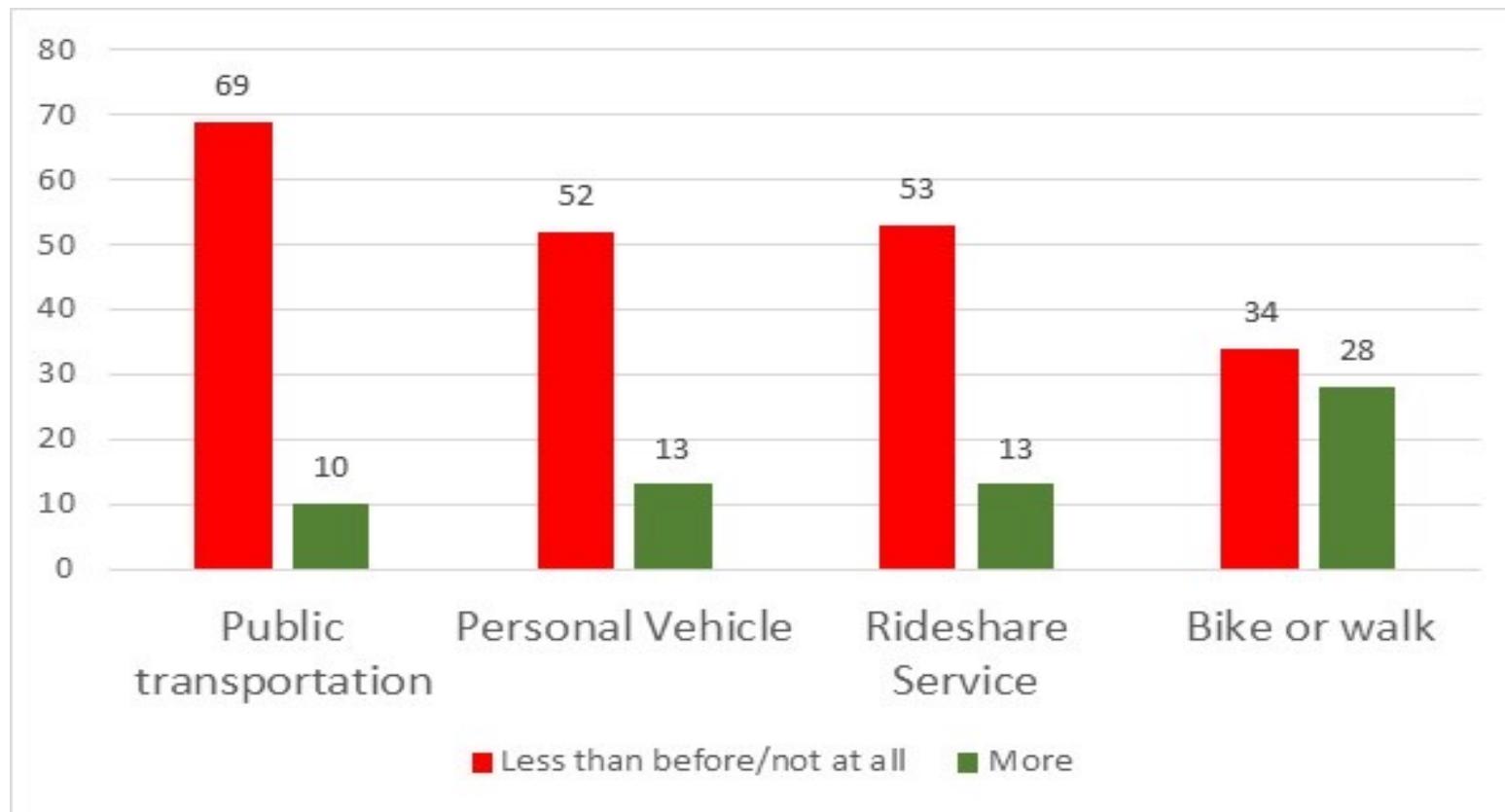
Majority of Respondents Traveled Less During Covid

- Miles driven during the pandemic decreased for all economic groups



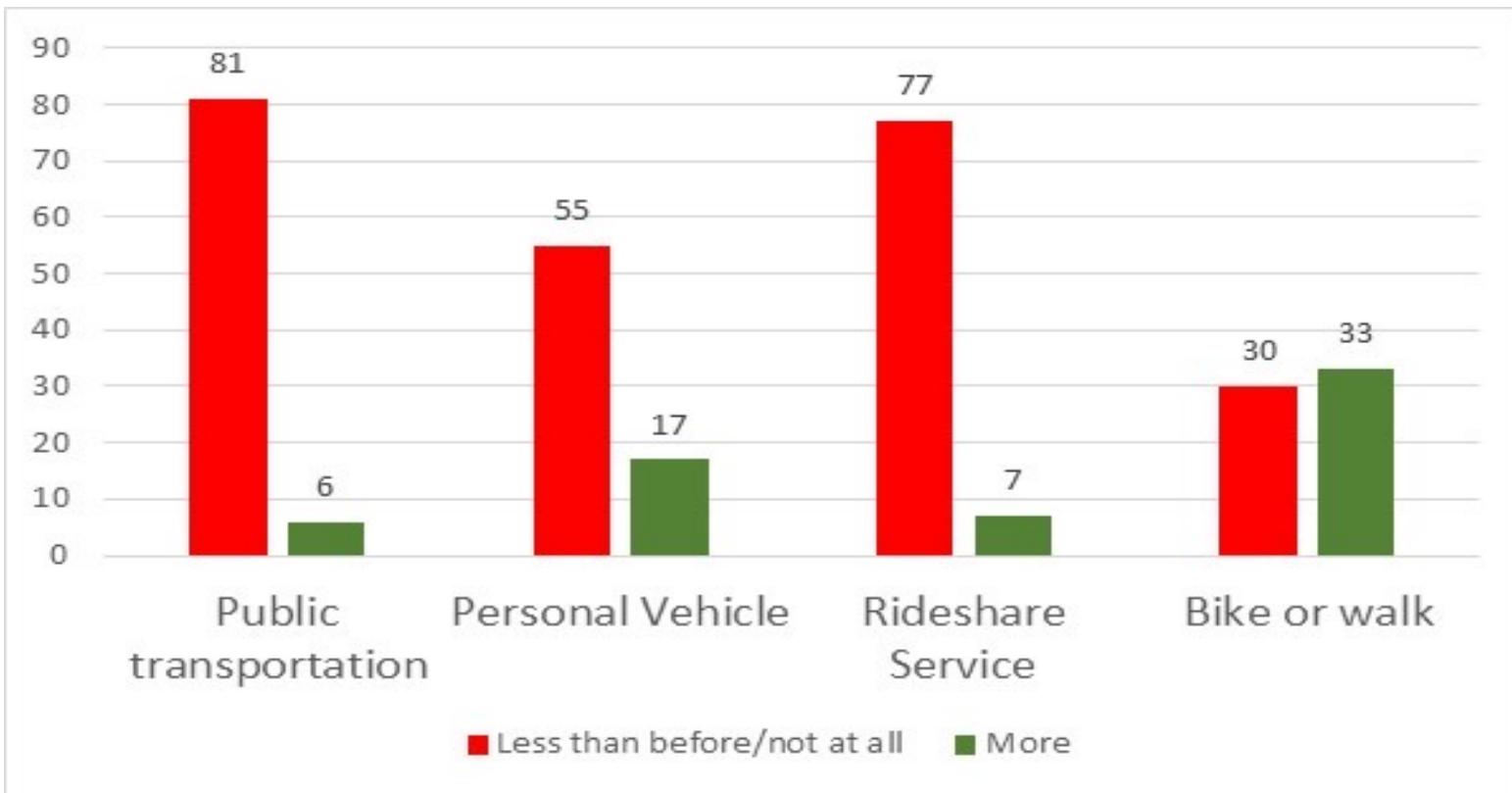
Changes in Transportation Choices - LMI

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



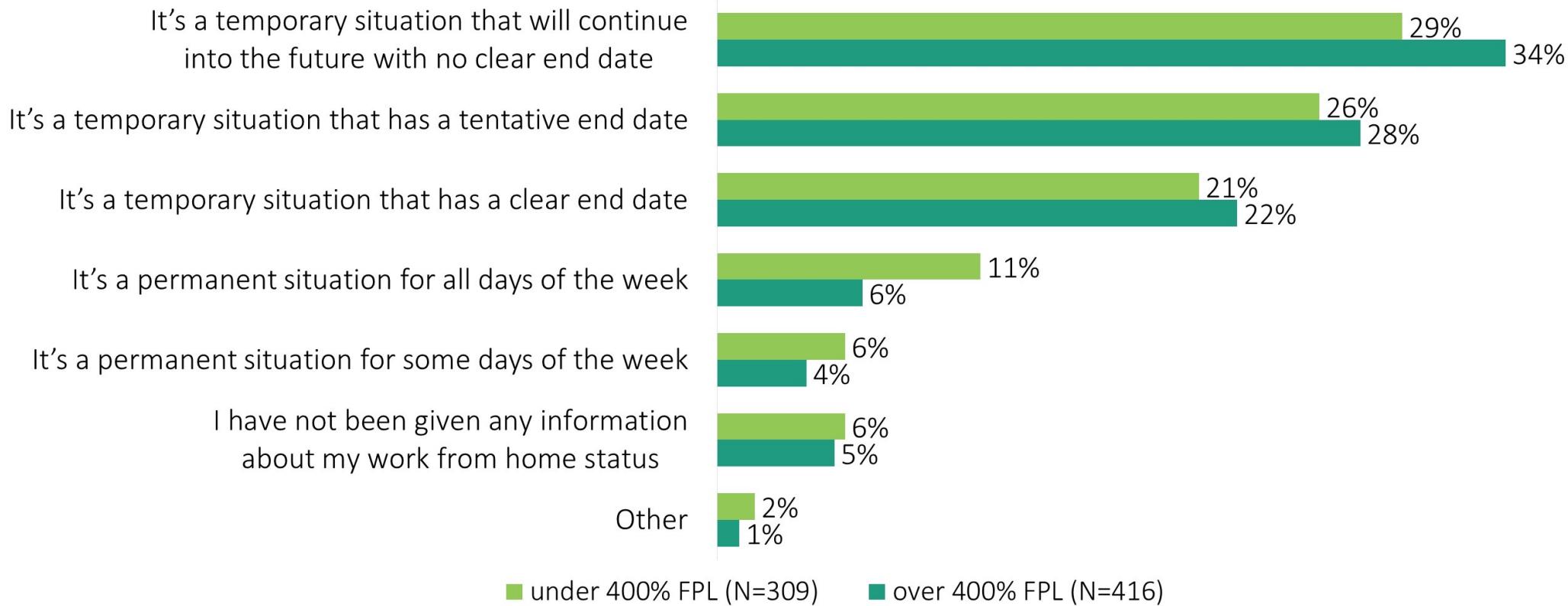
Changes in Transportation Choices – Non-LMI

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



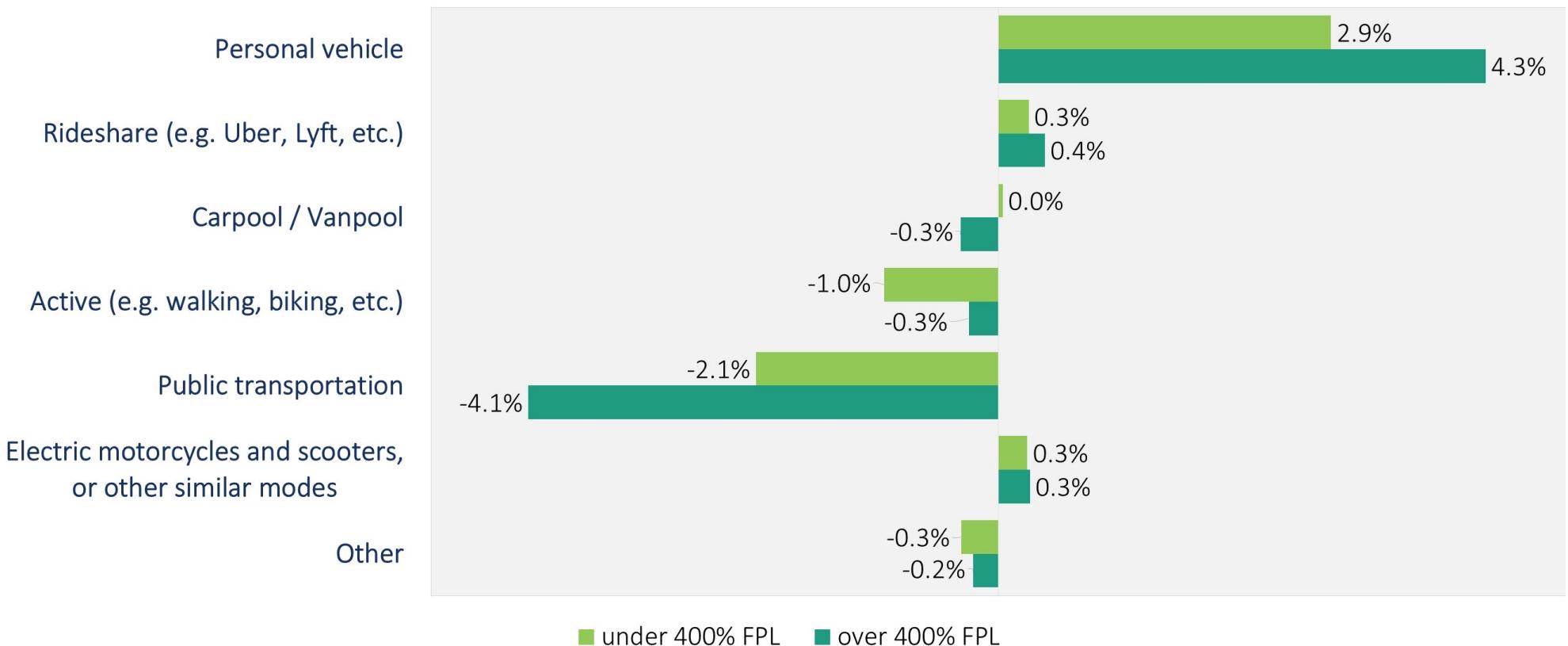
Shift Away From Commuting

- Working from home was viewed as **temporary situation** for both income groups



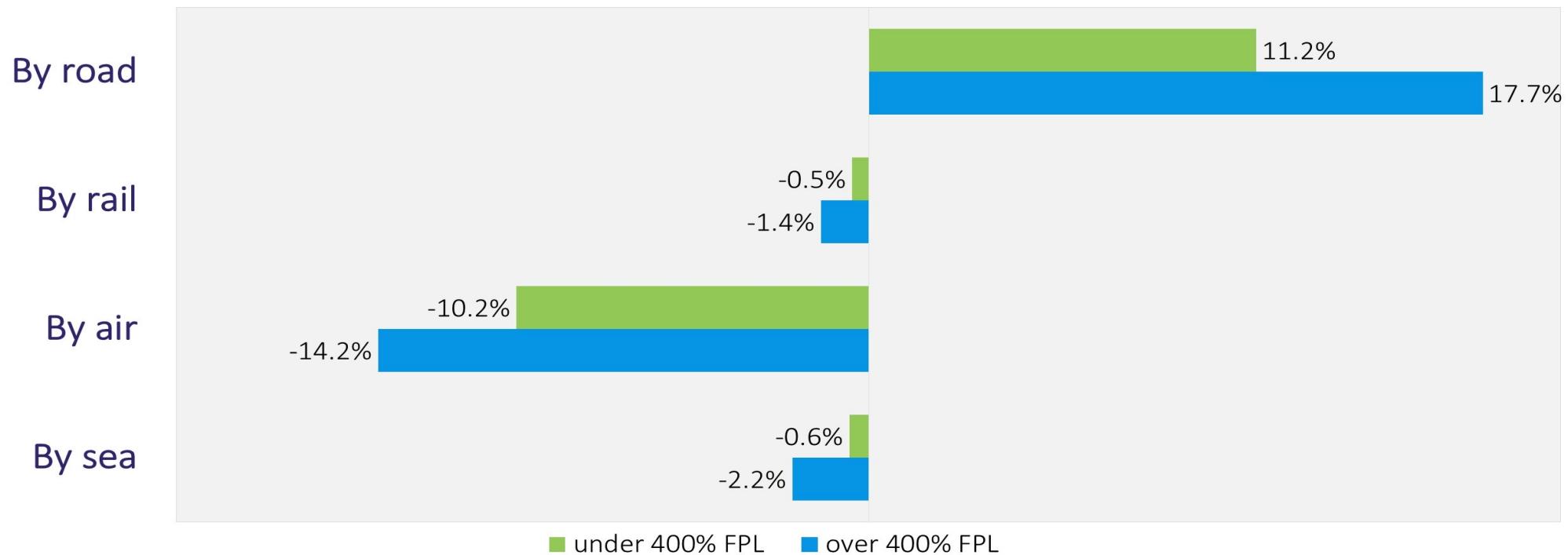
Commuting Changes During Covid

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



Preferred Modes of Travel for Long-distance Trips

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



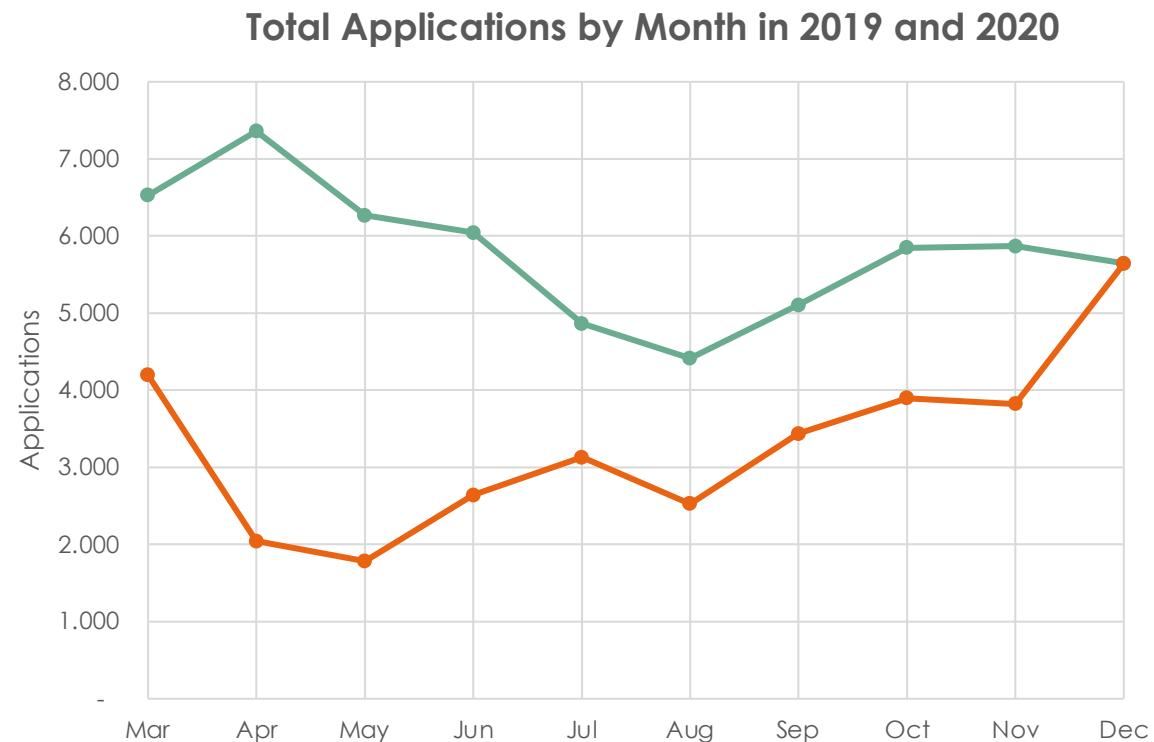
Vehicle Purchasing Plans During Pandemic

- 45% of respondents planned to acquire a vehicle before the pandemic
- 29% of respondents said that the pandemic **affected** their plans to acquire a vehicle
- 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**
 - 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

CVRP Applications Fell Sharply During Covid*

- 43% decrease in applications in 2020
- "Sustained" recovery started in September 2020

Year	Total Applications*
2019	57,941
2020	33,119
% change	-43%



**Applications are aggregated from Mar – Dec for year 2019 and 2020*

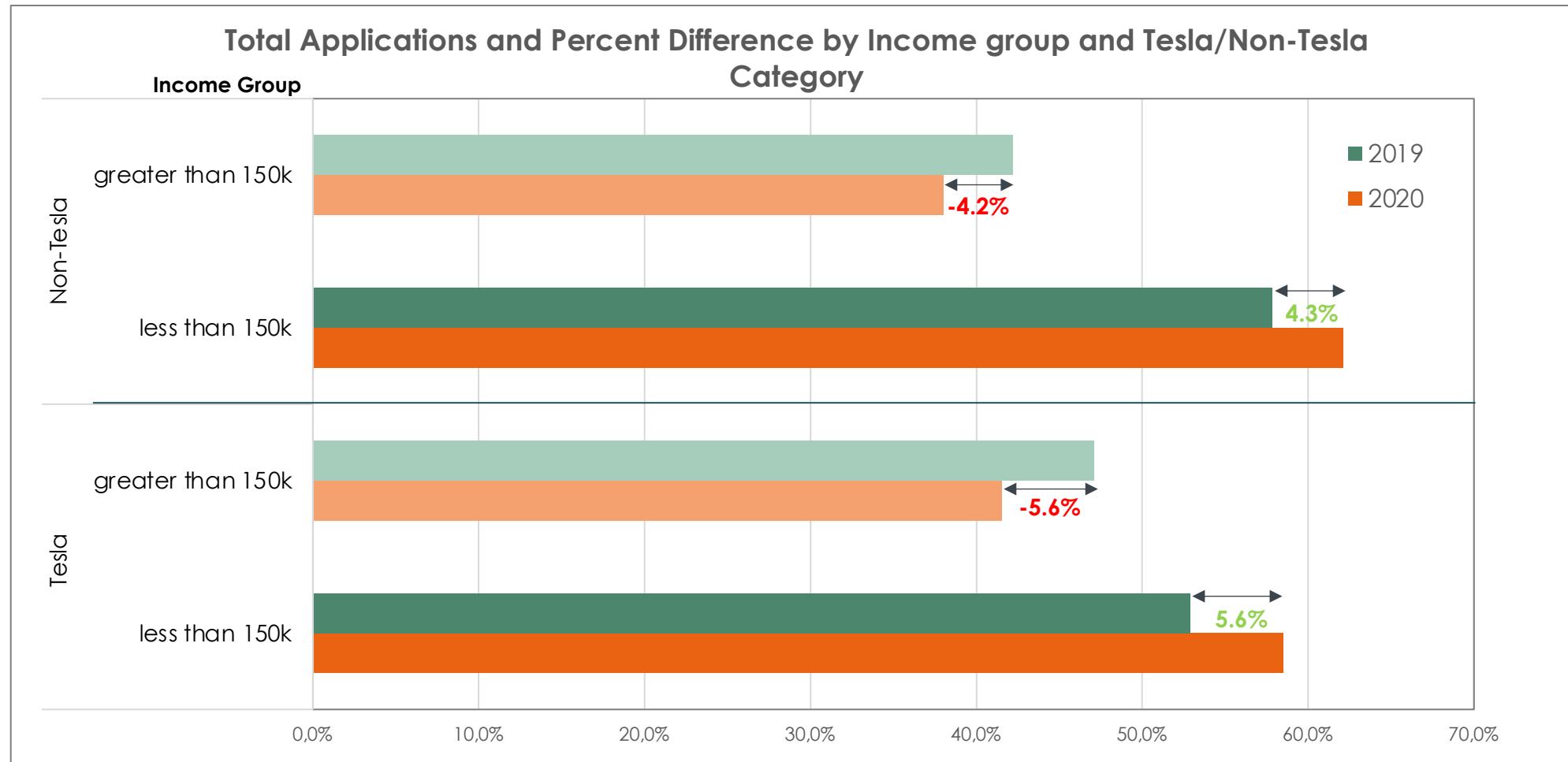
CVRP Share of All CA EVs Registered

- Percentage of all EVs purchases that were rebated declined from nearly 75% to 42% during Covid
- Lag between rebate and registration date causes some shifting in monthly data

EV Registrations and CVRP Rebates			
Period	EV Registrations	CVRP Rebates	Percentage
Feb 2012 - Oct 2016	235,987	171,101	73%
Nov 2016 - Feb 2020	381,312	210,500	55%
Mar 2020 - Dec 2020	70,511	29,437	42%
Complete Dataset			
Feb 2012 - Dec 2020	687,810	411,051	60%

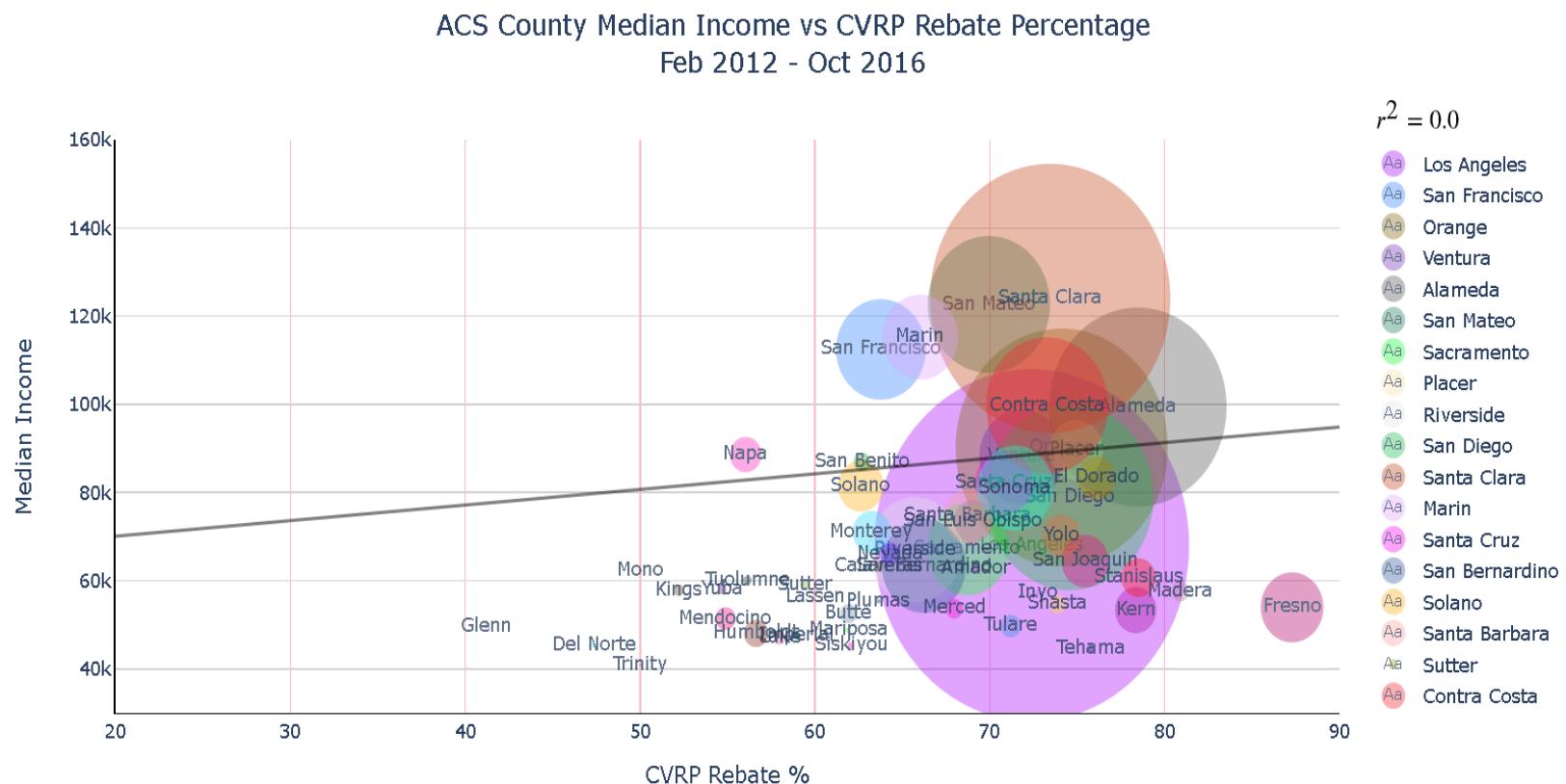
CVRP Applications by Household Income

The proportion of applications with less than \$150k household income increased for both Tesla and Non-Tesla groups



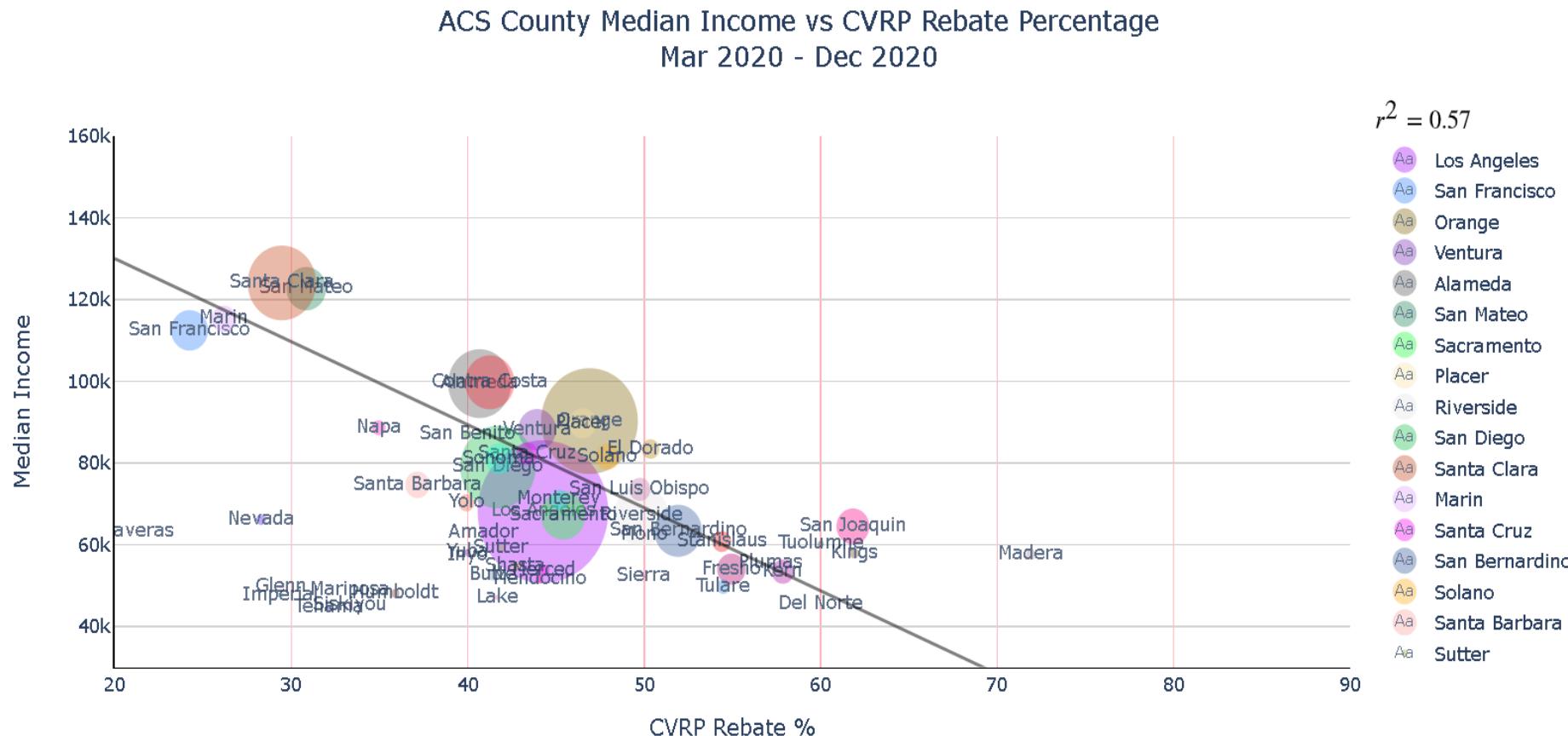
CVRP Rebate % by County 2019

- Early years show higher income counties had high rebate percentage

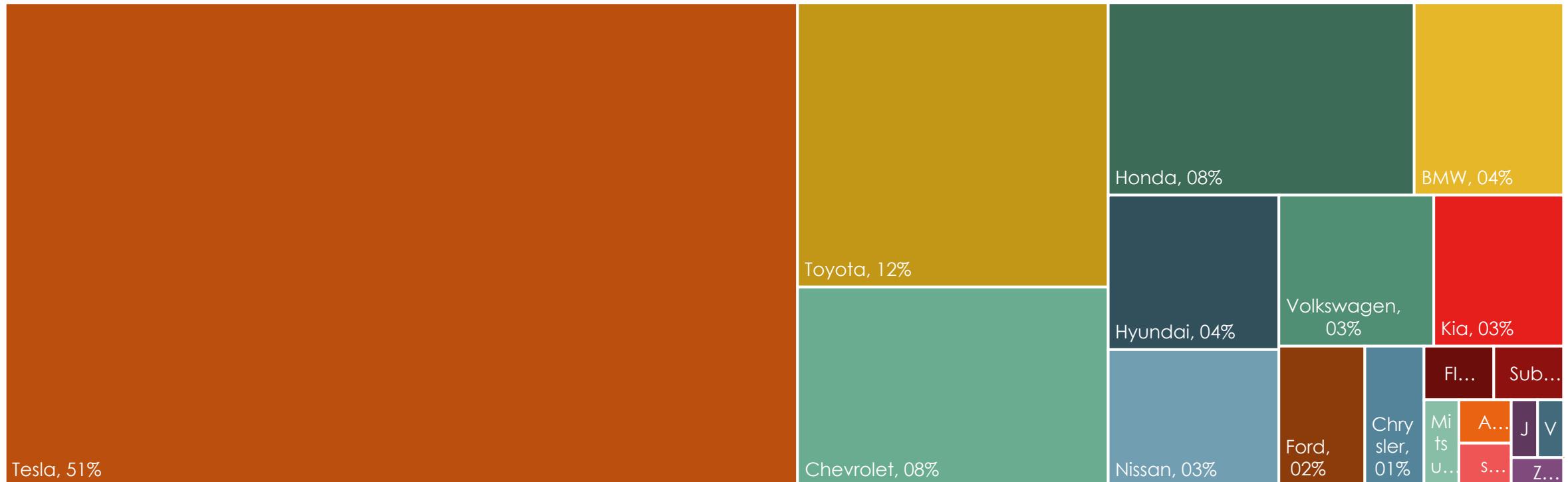


CVRP Rebate % by County 2020

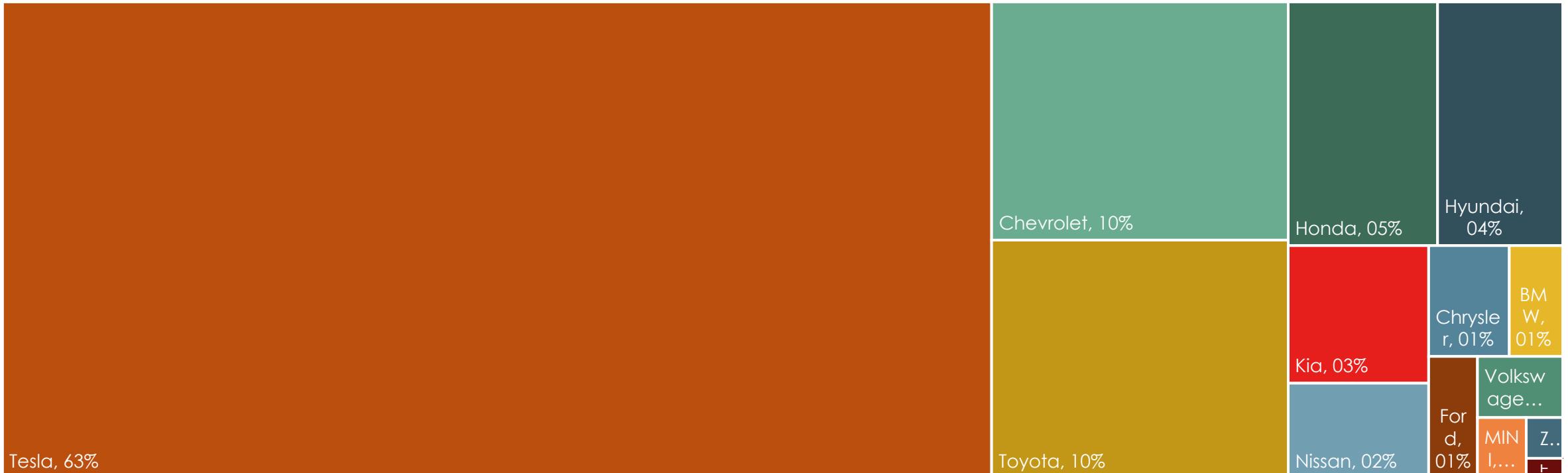
- High income counties saw rebate % plummet, but some lower income counties continue to have low rebate percentages



Percent Share of Applications by Vehicle Make in 2019



Percent Share of Applications by Vehicle Make in 2020



Alta

Audi

BMW

Chevrolet

Chrysler

Energica

FIAT

Ford

Harley-Davidson

Honda

Hyundai

Jaguar

Kia

MINI

Mercedes-Benz

Mitsubishi

Nissan

Polestar

Subaru

Tesla

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
- CVRP participation demographics are largely likely to remain similar during economic downturns