

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

6/13/2022

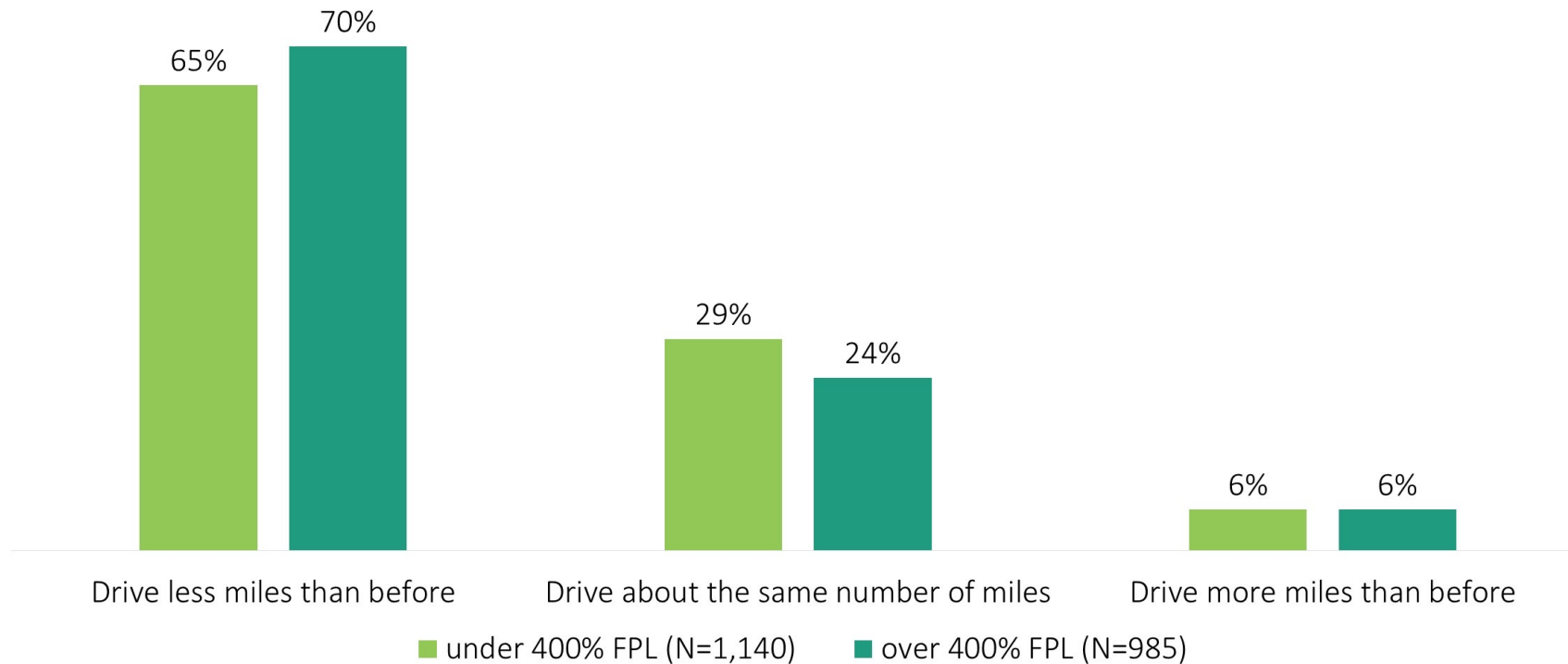
John Gartner, Senior Director



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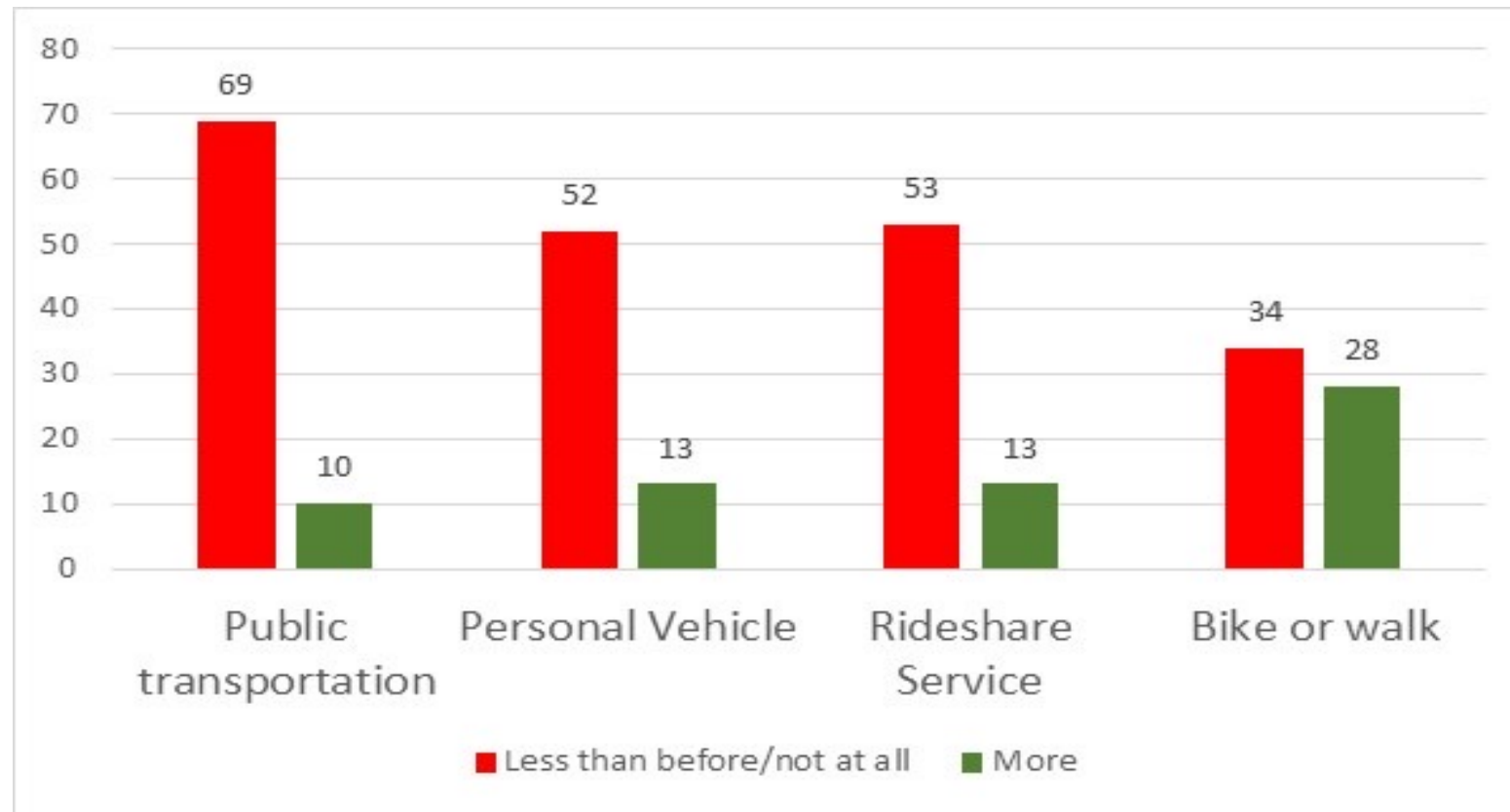
# Majority of Respondents Traveled Less During Covid

- 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

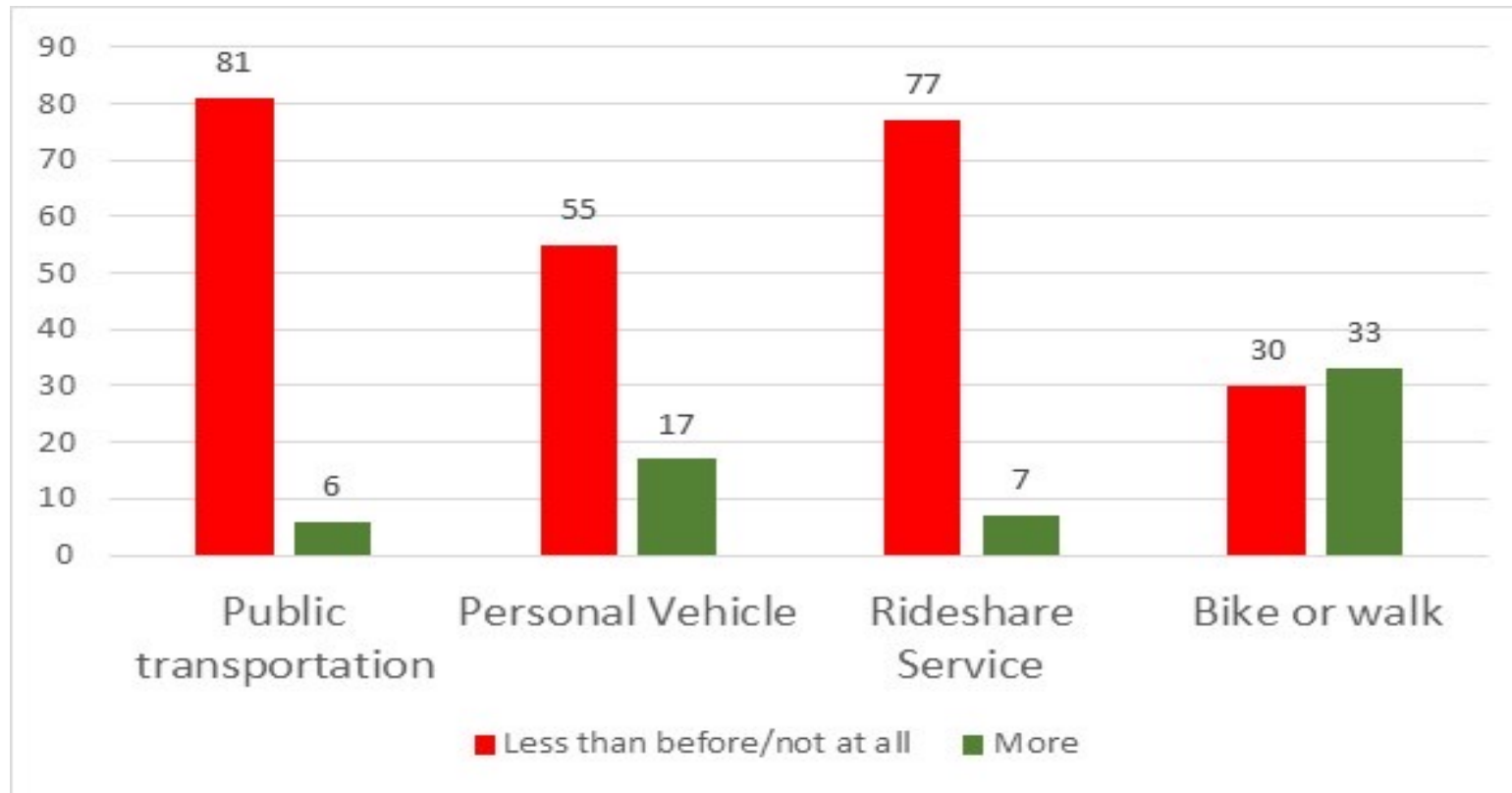


*\*Left column (darker colored) of each option represent LMI respondents, right column (lighter colored) represent non-LMI respondents.*

*"Not applicable" and blank responses are excluded.*

# Changes in Transportation Choices – Non-LMI

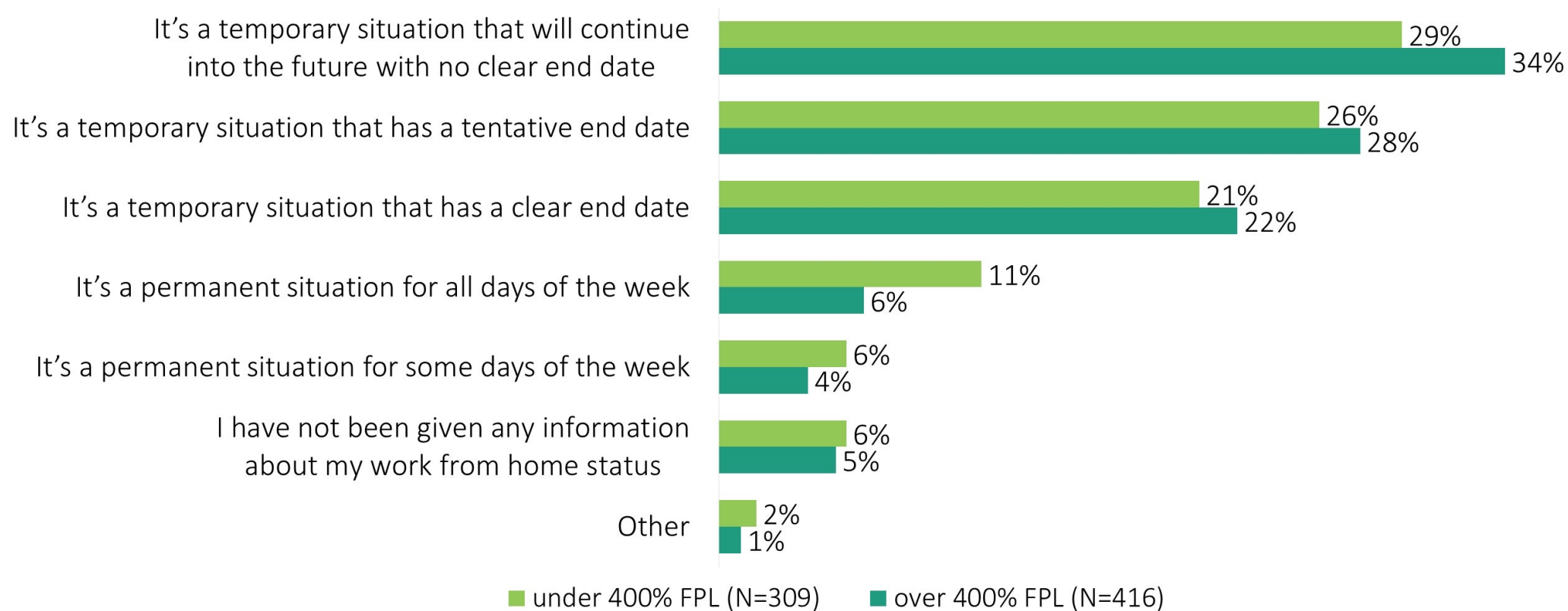
- Non-LMI said they were less likely to continue using public transit and more likely to bike or walk



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"Not applicable" and blank responses are excluded.*

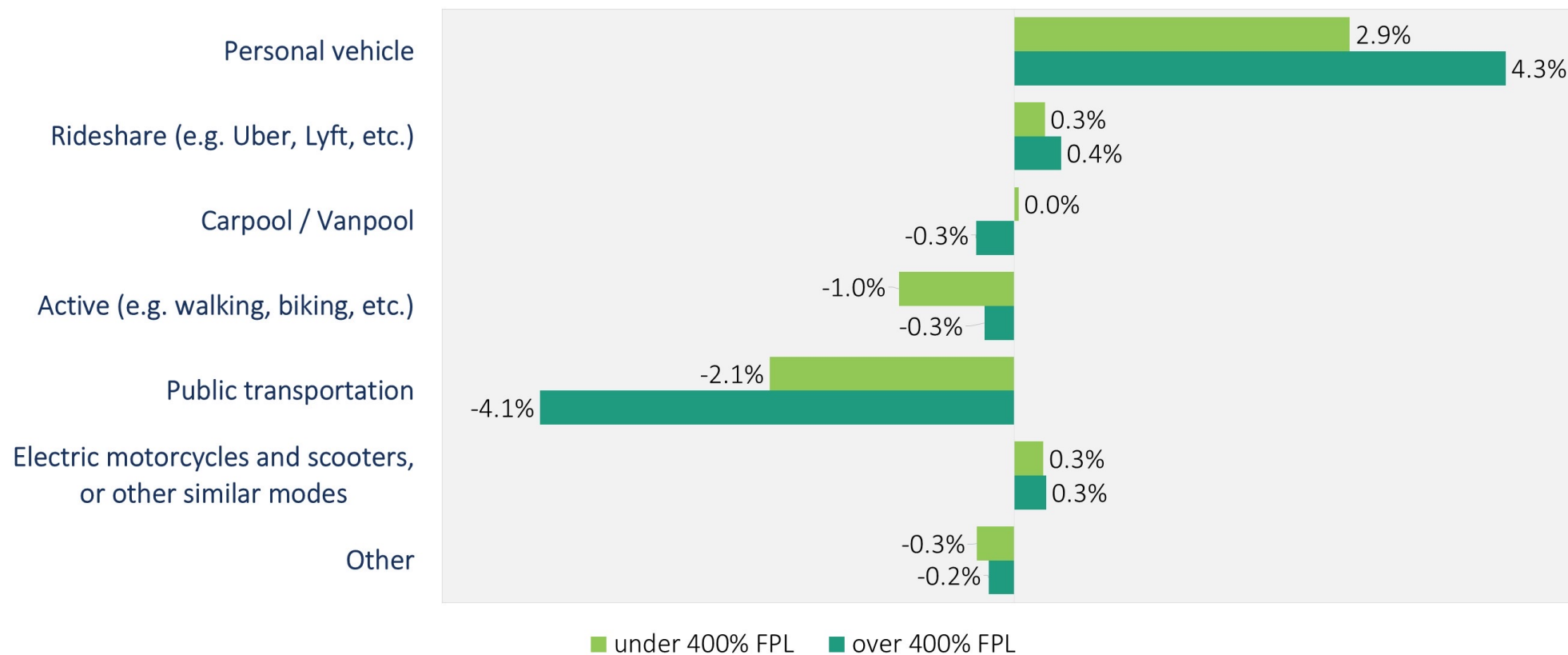
# Shift Away From Commuting

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



# Commuting Changes During Covid

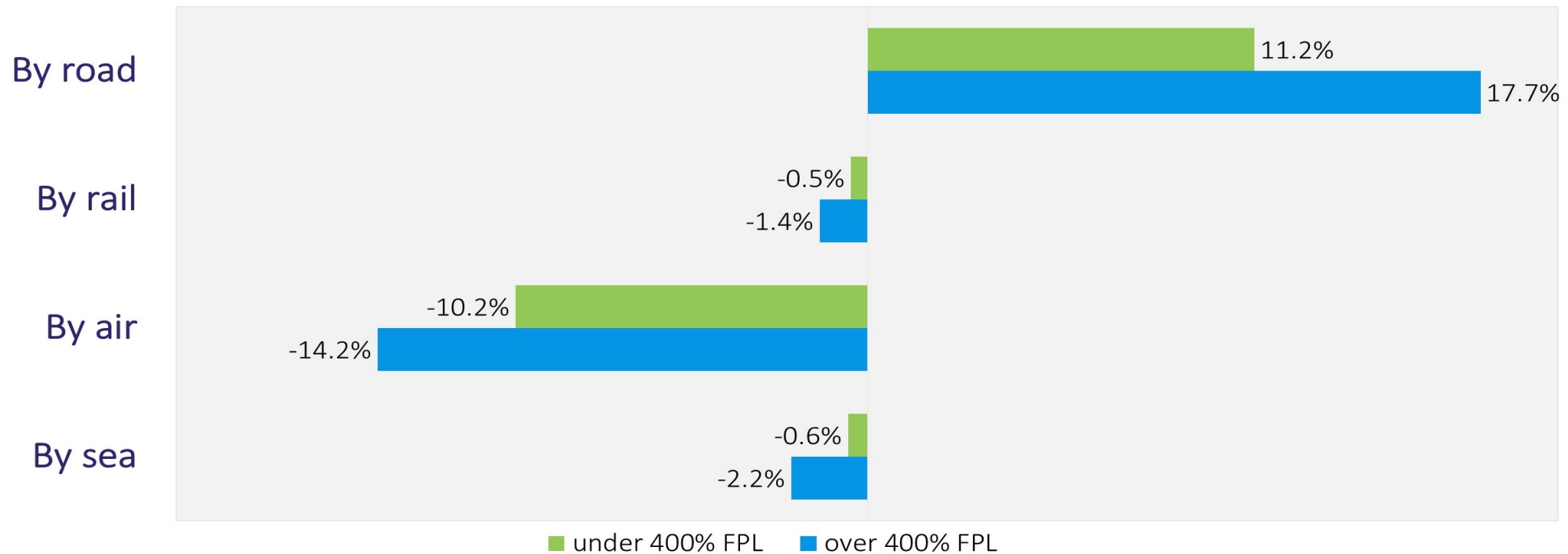
- **Increase** in personal vehicle use is similarly reflected to the **decrease** in use of public transportation



*\*Before pandemic, under 400% FPL N=672, over 400% FPL N=644. During pandemic, under 400% FPL N=397, over 400% FPL N=364. Blank responses are excluded.*

# 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

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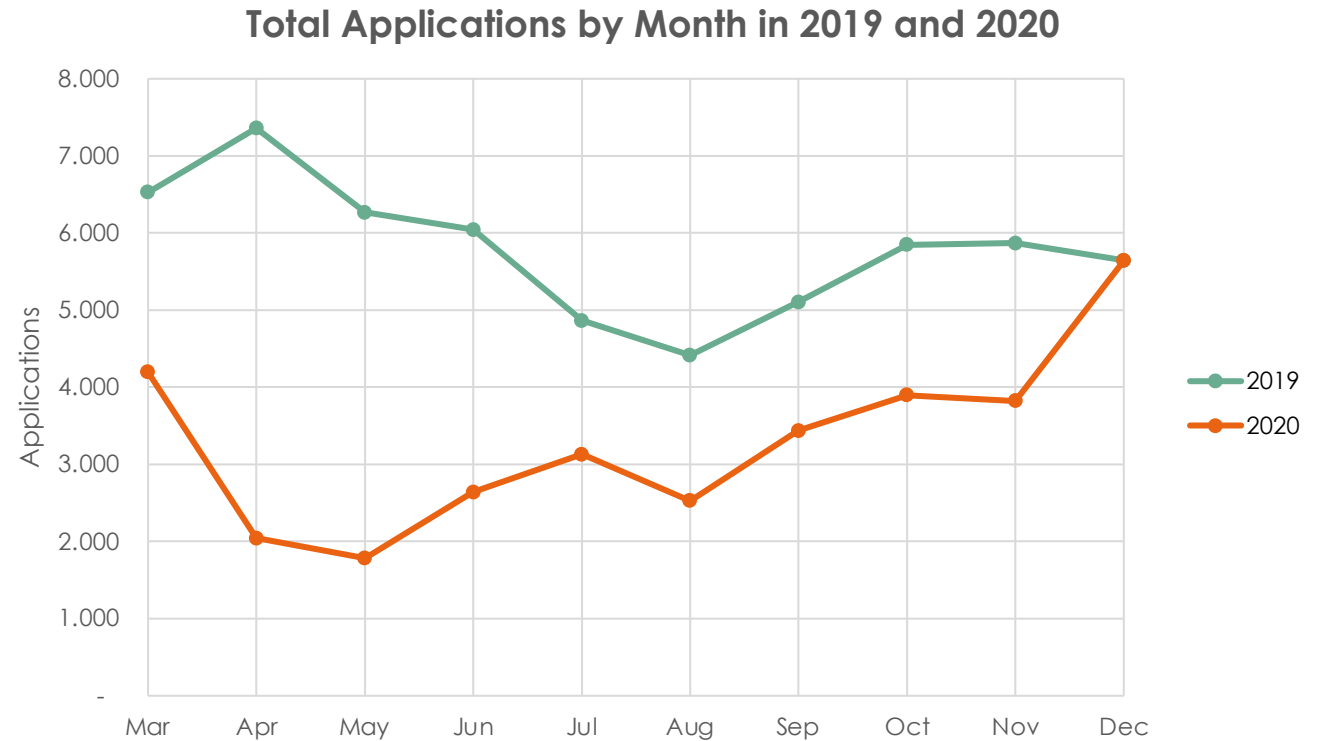
- 45% of respondents planned to **acquire a vehicle before the pandemic**
- 29% of respondents said that the pandemic **affected their plans to acquire a vehicle**
- Of the group that owned a vehicle before the pandemic and the pandemic changed their plans to acquire another vehicle, **66% decided to 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

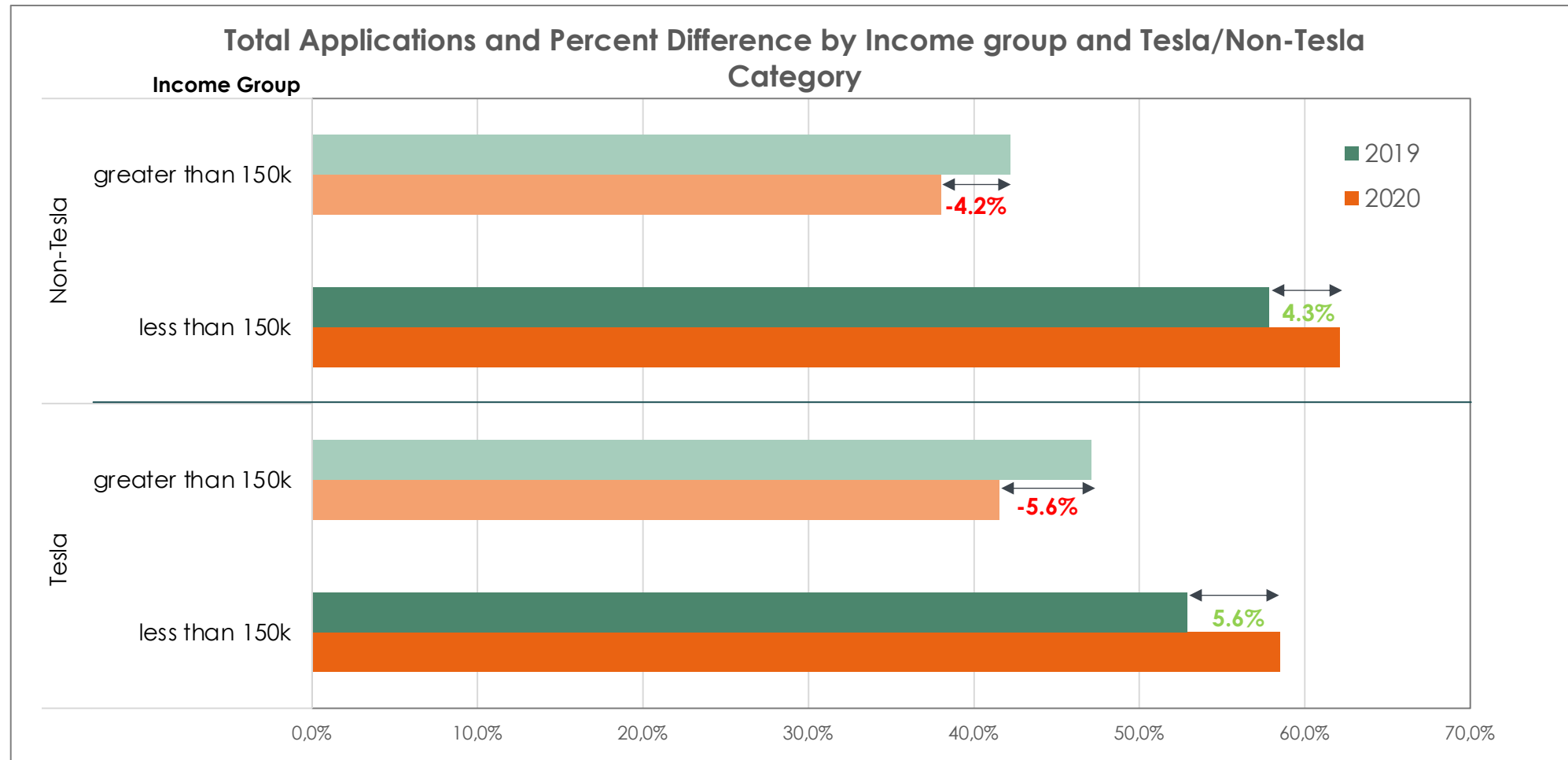
# CVRP Share of All CA EVs Registered

- 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%

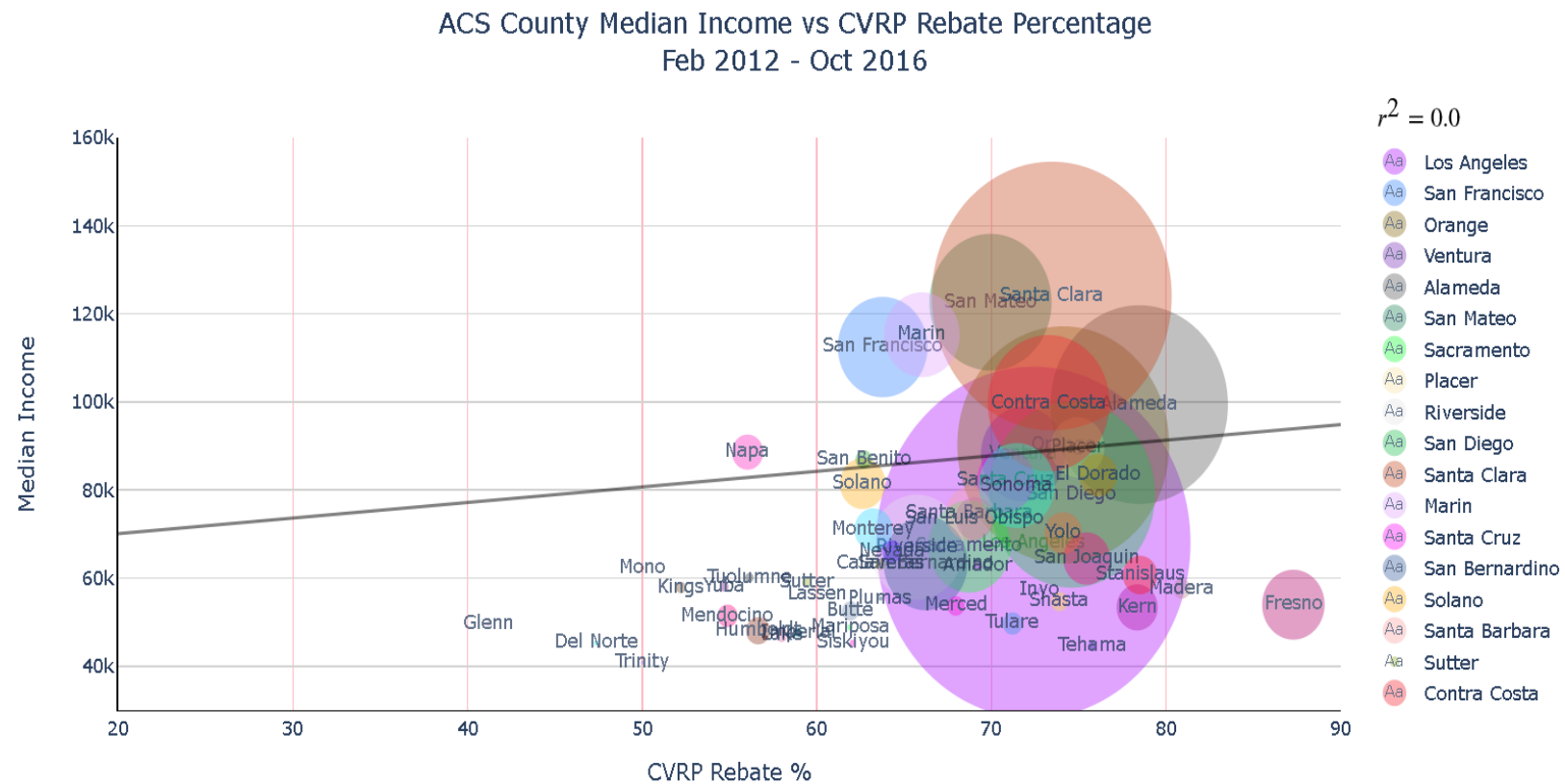
# CVRP Applications by Household Income

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



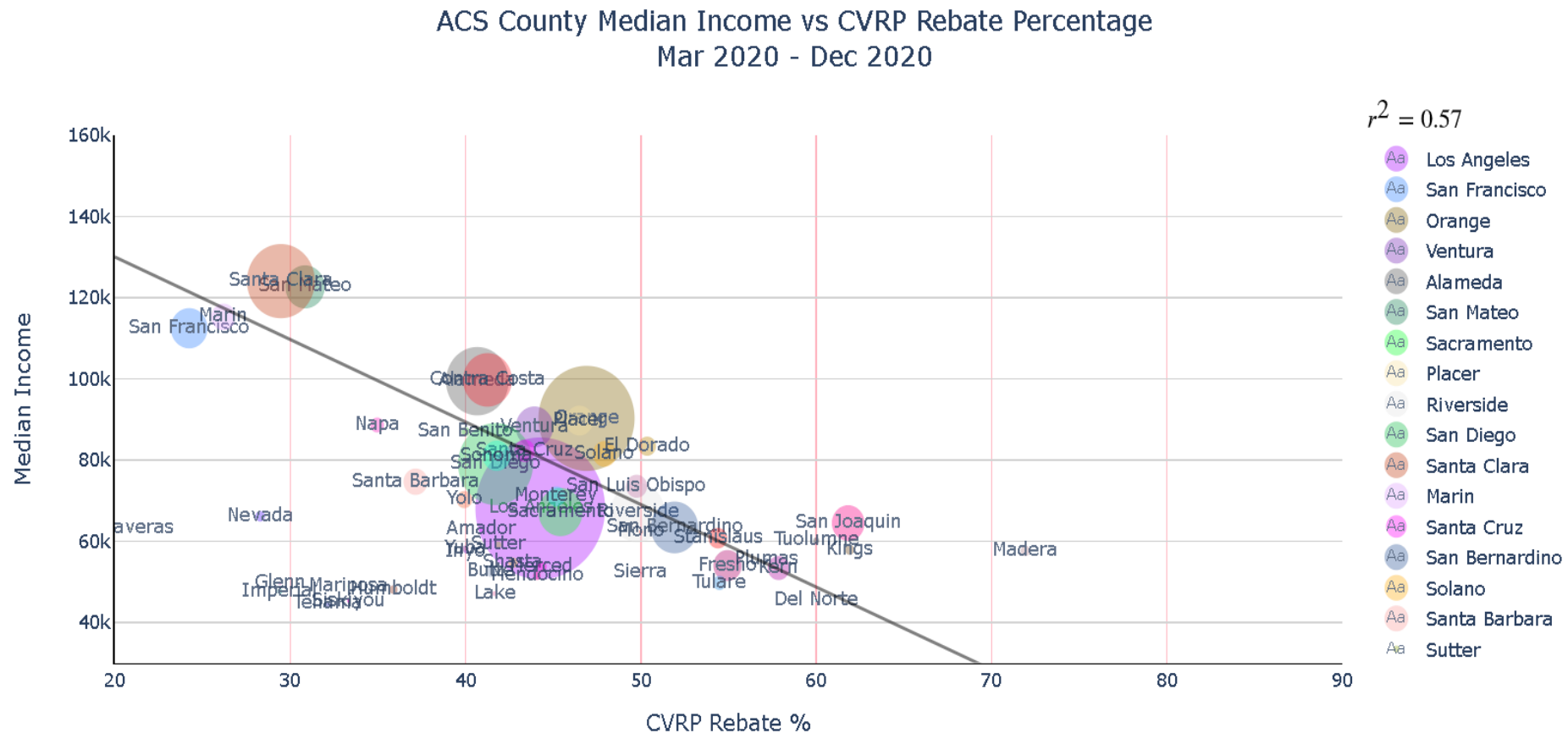
# CVRP Rebate % by County 2019

- Early years show higher income counties had high rebate percentage

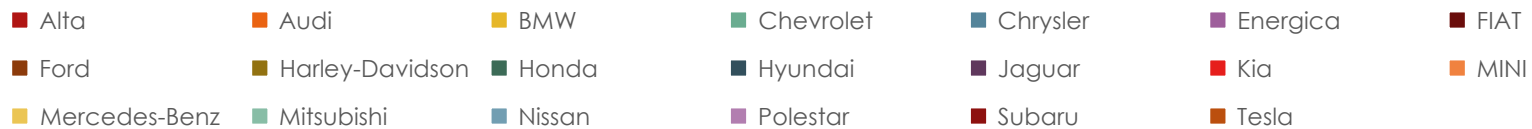
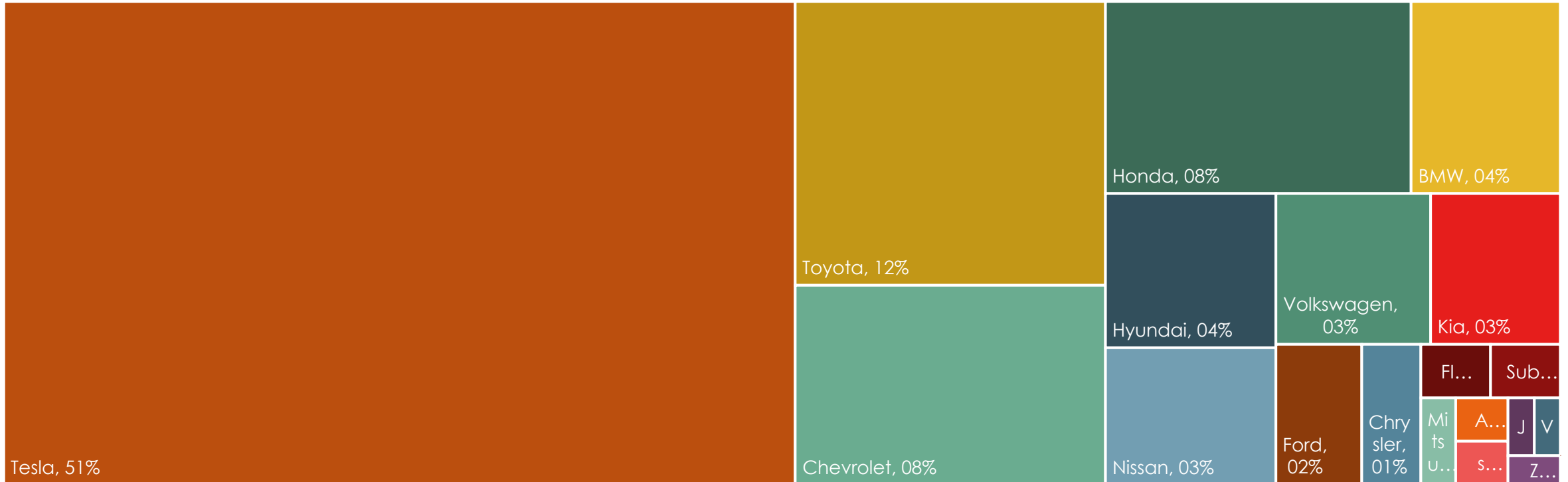


# CVRP Rebate % by County 2020

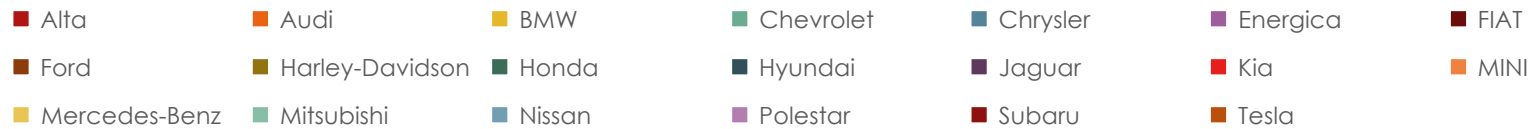
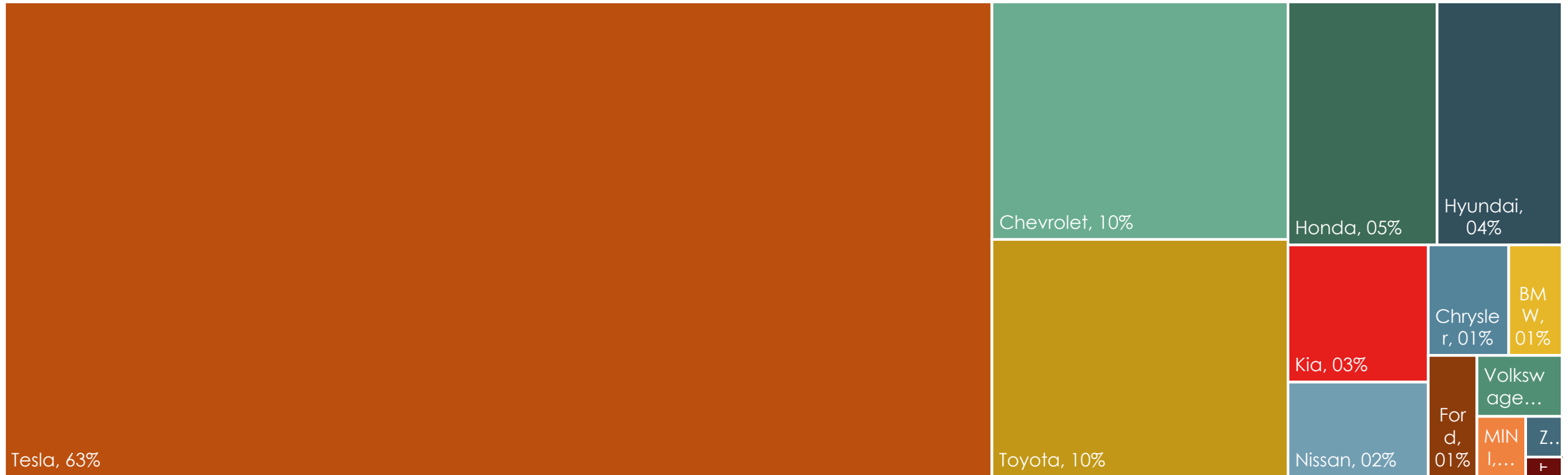
- High income counties saw rebate % plummet, but some lower income counties continue to have low rebate percentages



# Percent Share of Applications by Vehicle Make in 2019



# Percent Share of Applications by Vehicle Make in 2020



# Conclusions

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- 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