



2019 Ipsos Automotive Navigator

Over the past 130 years, we have seen automobiles slowly and steadily evolve. Lately, however, the automotive industry seems to be traveling in the fast lane. We are embarking on an exciting new era in this business, as new technologies shift the way we drive and perhaps eliminate the traditional combustion engine. In times of such disruption, marketing experts need the latest data, research and insights to help them navigate the changing times.

The **2019 Ipsos Automotive Navigator** is the ideal tool to help you understand global consumer opinion on key auto industry topics: *Autonomous, Electric Vehicles, Shared Mobility, Connectivity* and *Advanced Product Features*. In its third year, the **Ipsos Automotive Navigator study** has been redesigned to better meet the needs of our clients. It effectively and thoroughly dives into customer behavior on these key topics. This information is essential for everyone with a stake in the competitive automotive industry.

Ipsos Automotive Navigator— NEW 2019 Features:

- A dedicated U.S. automotive expert leads the study.
- A complete redesign of ALL three modules, with a greater focus on consumer behavior and the addition of content based on feedback from current subscribers.
- A modification of key index questions for enhanced trendability on an annual basis.
- Improved reporting, including insights, charts and tables which are formatted to be easily shared with your colleagues.

Survey Modules

- Module 1—**Autonomous and Advanced Features:** August 2019
- Module 2—**Electric Vehicles (Needs & Intentions):** October 2019
- Module 3—**Shared Mobility (Car Sharing & Ride Hailing):** December 2019

Methodology, Scope and Deliverables:

- Ten countries targeted: U.S., China, Japan, Brazil, Russia and Euro5 (Germany, France, UK, Italy, Spain).
- 2000 completes per country/module with age/gender quotas to reflect the country's demographic profile.
- Study deliverables include a report, detailed tables, a SPSS data file and a user-friendly reporting tool to allow for easy manipulation of the data.

Investment:

- You can obtain the complete package, consisting of the three modules and all markets for \$40,000 (**cost is roughly \$0.65 per complete!**).

For more information about the **2019 Ipsos Automotive Navigator**, please contact:

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Module 1:

Are people ready to let their vehicles do their driving? This module focuses on what consumers around the globe think about self-driving. It also examines 16 features measuring: consumer awareness, usage, interest and willingness to pay.

16 Connected Car Features & Evaluation

- **Predicting the Traffic** It detects traffic jams before they occur and offers the quickest alternative routes.
- **Connect Route Service** This offers personalized routes based on the driver's preference for sights, restaurants and live events happening near their route.
- **Emergency Service** A button is pressed in your vehicle to receive assistance for a medical, criminal or mechanical emergency. And, it will automatically contact emergency services in the case of an accident.
- **Advanced Drive Assist Systems** This includes several features to assist you with driving, including: adaptive cruise control (with stop and go functions for city traffic), lane departure warning system, automatic lane centering and blind spot monitoring.
- **Check Vehicle Location** The feature allows you to track your vehicle's location and where it has been, using your smartphone. It also has the capability to remotely slow the speed of your vehicle, if it is stolen.
- **Autonomous Driving Vehicle** A vehicle can drive itself from a starting point to a predetermined destination in "autopilot" mode (using various in-vehicle technologies).
- **Search for Nearby Parking Lots** It can identify available parking spaces in the surrounding area.
- **Automated Parking** After dropping you off at your destination, the vehicle will drive itself and self-park in a pre-determined parking space.
- **Smart Refueling/Recharging** This will locate the least expensive fuel/recharging stations along your route and provide directions to the station.
- **Connected Homes/Daily Life Management** It gives owners the ability to control their home's lights, locks, thermostats, cameras, garage doors, etc. from their vehicle.

- **Mobile Health Management** In case of an emergency, the vehicle will self-drive you to a medical service provider.
- **In-Vehicle Delivery** Packages can be delivered directly to the trunk or cargo area of your parked vehicle, if you are not going to be home.
- **Vehicle Diagnostic** This will provide key technical/diagnostic information about the vehicle which can be monitored using your smartphone and the software in the vehicle can be updated remotely.
- **Accident Avoidance** The automatic emergency braking system will be deployed and steer your vehicle away from an oncoming obstacle, in an effort to avoid an accident.
- **In-Vehicle Living Room** While in self-driving mode, the interior of a fully autonomous vehicle can be transformed into a comfortable space for work or relaxation.
- **Connected Driver's Preference** The driver's preferences (seat setting, desired temperature, playlists, etc.) will be learned and set each time the identified driver operates the vehicle.

Topics:

- Awareness, perception, current usage, future usage intent and purchase consideration of a vehicle with autonomous mode
- Nearly 20 statements related to attitudes and usage regarding autonomous vehicles
- Understanding of what drivers would do if operating the vehicle in autonomous mode
- Identify most trusted providers of autonomous vehicles
- Demographics (age, gender, income, etc.)

Module 2:

What would it take for a driver to consider buying an electric vehicle? This module asks consumers from around the world to share their views on EVs.

Topics:

- Attitudes towards traditional gas versus electric engines
- Acceptance and Interest/Purchase Intent in BEV /HEV /PHEV
- Barriers of EV usage and ownership (range, charging infrastructure, price, etc.)
- Consumer needs and considerations before buying an EV (lower price, greater range, better design, larger vehicle)
- Psychographics (interest in the environment, global warming, alternative energy)
- Current vehicle ownership/Demographics (age, gender, income, etc.)

Module 3:

What do people think of ride/car sharing and other ride hailing or taxi services that are available today? In Module 3, we examine consumer attitudes towards these services and the motivation and experiences which need to be in place for them to choose shared mobility.

Topics:

- Awareness and usage of ride/car sharing services and other ride hailing services (taxi, bus, train, etc.)
- Typical transportation needs/distance to destination
- Transportation needs (urban, suburban, rural areas)
- Occasions consumers hire a ride
- Motivation for hiring a ride instead of using traditional means of transportation
- Interest in subscription services/mobility offers/flexible leasing
- Price acceptance of shared mobility offers
- Interest of ride sharing services that may use autonomous vehicles
- Demographics (age, gender, income, etc.)