future of mobility

IPSOS

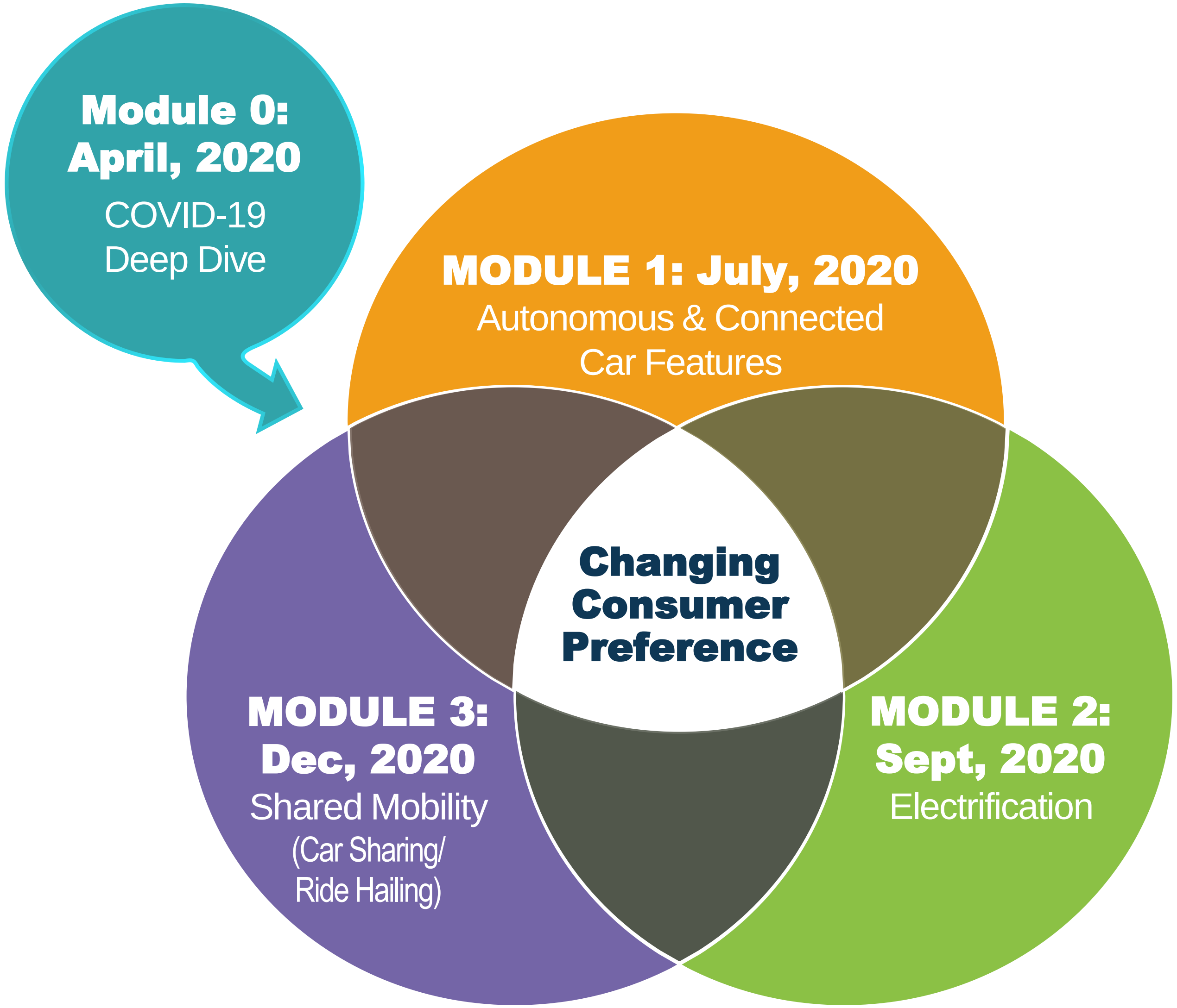
AUTOMOTIVE **NAVIGATOR**

GAME CHANGERS

IPSOS MOBILITY NAVIGATOR

A SYNDICATED STUDY FOCUSED ON THE

KEY TRENDS IN MOBILITY & IMPACT OF COVID-19



UPGRADES for the **2020 PROGRAM**

1. Inclusion of Module 0 that is focused on the impact of **COVID-19 for the Auto & Mobility industry**
2. Updates to each module, mostly **upgrade of Module 1 with Autonomous and Connected Car features** with COVID-19 tracking questions across each module.
3. Expanded the countries included in the program, **added India in 2020** for a total of 11 countries. *Additional countries can be added if funded by the local country.*

OVERVIEW and DELIVERABLES

METHODOLOGY.

Each module is a 15 minute online survey written in the native language of each country. Sample is provided by Ipsos I-say panel and new car buyers are the primary target.

COUNTRIES.

Eleven countries targeted: US, China, Japan, Brazil, Russia, India and Euro5 (Germany, France, UK, Italy, Spain).

COMPLETES.

1000 completes per country Module 0 COVID-19 Deep Dive
2000 completes per country/module with age/gender quotas to reflect the country's demographic profile.

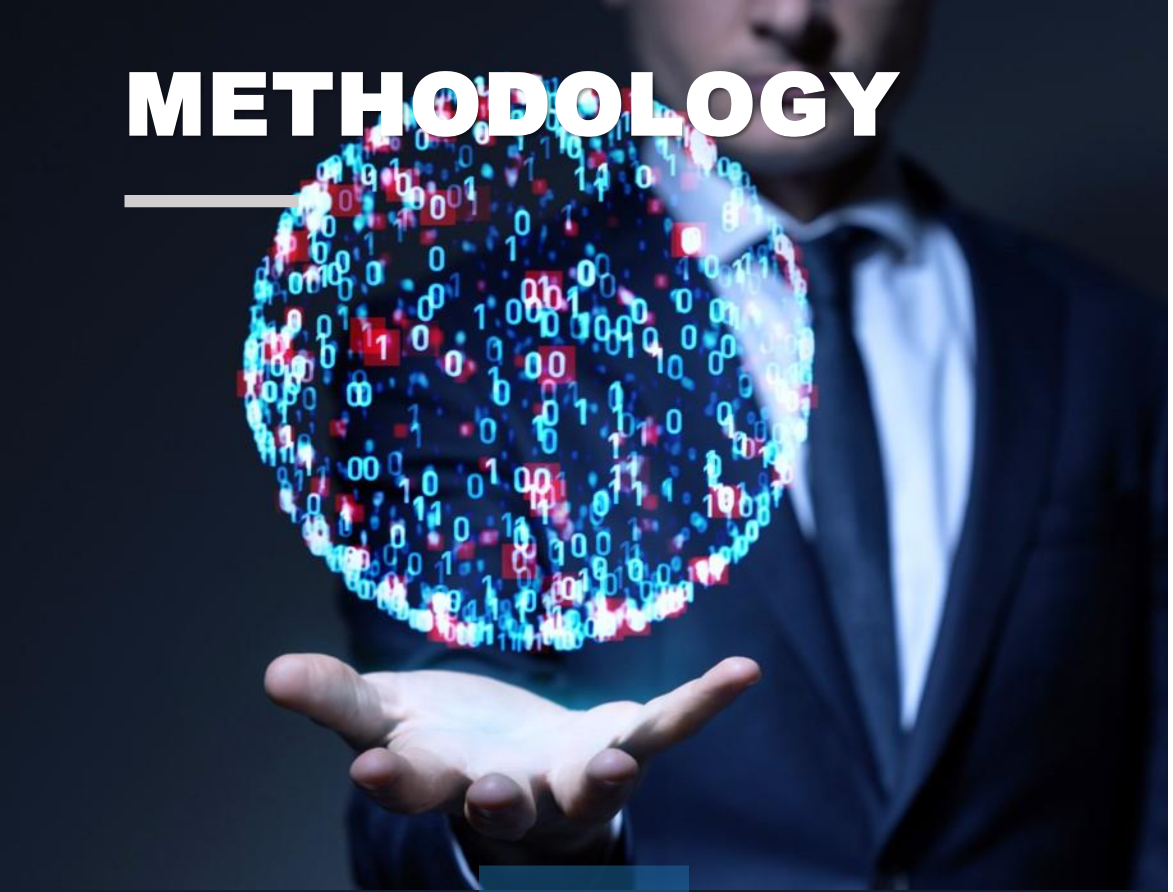
DELIVERABLES.

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.

A full subscription cost is **\$60,000 USD/ €55,000 Euros (cost is roughly \$0.85 per complete!). This investment includes all** four modules. Modules can be sold individually – 1 module (\$25K), 2 Modules (\$35K), 3 Modules (\$45K) for the 3 core modules or for just Module 0 (\$20k).

METHODOLOGY



This study was a 15 minute online survey that utilized the consumer panels of Ipsos and several select partners to collect responses. The methodological highlights include:

- **Sample** – Total sample size of 77,000
  - Target 1,000 completes per country for Module 0
  - Target 2,000 completes per country for Module 1 through 3
  - Quotas were set to reflect actual age/gender breaks for each country and data weighted to adjust for any variances to the targets that occurred during sampling.
- Each questionnaire was conducted in the **native language of each country**; reporting in English only.

STUDY CONTACT

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PROJECT TIMING

CURRENT REPORTING DATES:

April 2020	July 2020	Sept 2020	Nov 2020
Mod 0	**Mod 1**	**Mod 2**	**Mod 3**
COVID-19	*Autonomous*	*Electrification*	*Shared Mobility*

MODULE 0

COVID-19 DEEP DIVE ON AUTOMOTIVE & MOBILITY

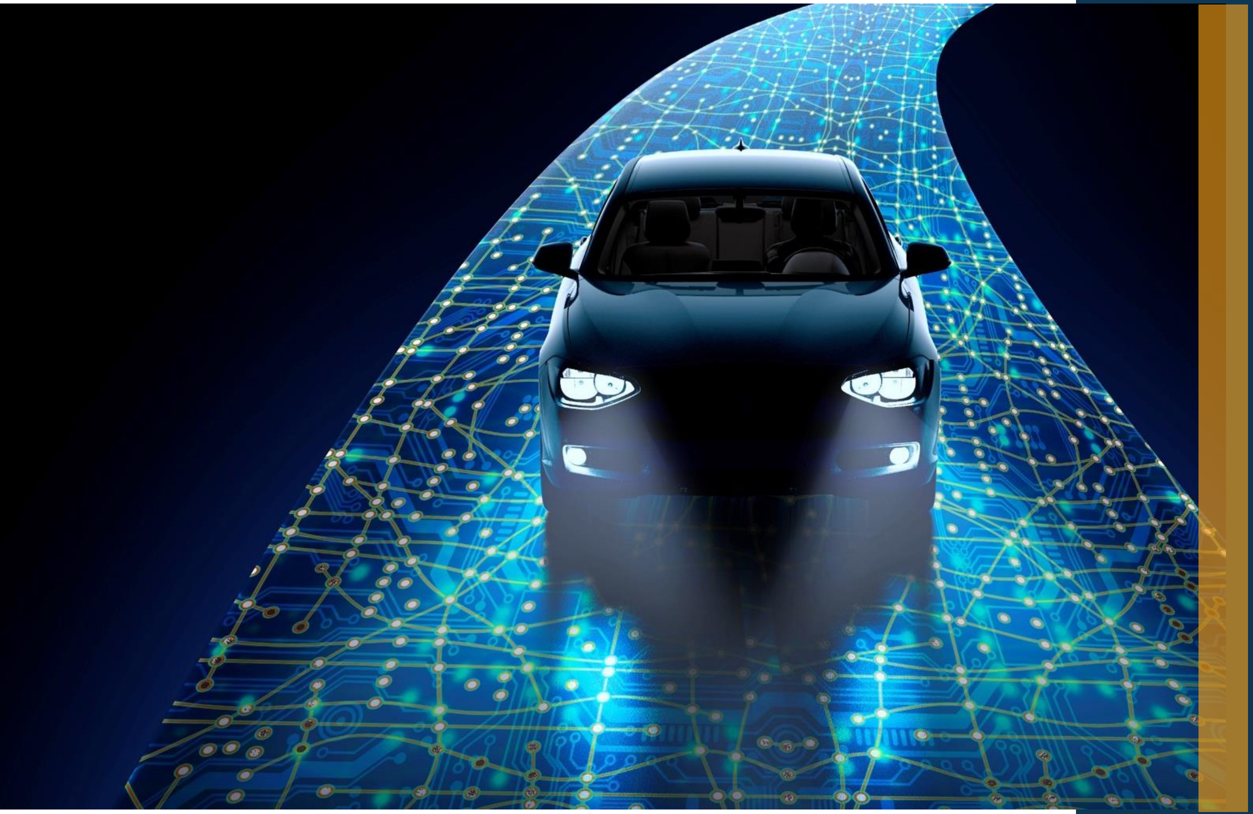
What is the impact of COVID-19 on consumers perceptions of shopping and purchasing a vehicle? And, **understand the impact of modes of transportation amongst the crisis.** This will also **provide direction on vehicle purchase intention** tracked quarterly through 2020.

TOPICS:

- Transportation ownership / usage
- Comfort in various activities as it relates to shopping / visiting a dealer / transportation usage
- Purchase consideration of vehicle and reasons why/why not and when
- Vehicle preference shift / key attributes for new vehicle
- Early signs of new normal
- Impact of different incentives to purchase / lease
- Levels of dealer support
- Willingness to consider virtual / digital purchase of vehicles
- Sources of information used for new vehicle shopping
- Impact of miles driven
- Demographics (age, gender, income, etc.)

MODULE 1

AUTONOMOUS AND ADVANCED FEATURES



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 12 Connected Car features measuring: consumer awareness, usage, interest and willingness to pay.

TOPICS:

- Monitor purchase intention
- 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
- Interest in 12 Connected Car features: focus between safety and convenience
- Demographics (age, gender, income, etc.)

MODULE 2

ELECTRIC VEHICLES (NEEDS & INTENTIONS)

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

SHARED MOBILITY (CAR SHARING & RIDE HAILING)

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 hailing/car sharing/car subscription services and other ride hailing services (taxis, bus, train, etc.)
- Understanding of usage of micro-mobility (i.e., last mile transportation)
- Typical transportation needs/distance to destination
- Identification of various occasions consumers select to use a ride hailing service over using their personal vehicle
- Motivation for hiring a ride instead of using traditional means of transportation
- Interest in subscription services/mobility offers/flexible leasing
- Interest in ride sharing services that may use autonomous vehicles
- Demographics (age, gender, income, etc.)

Example Insights from 2019...

MODULE 1

AUTONOMOUS AND ADVANCED FEATURES

- On a global basis, ***36% would consider a vehicle with autonomous mode*** - however, only 12% would definitely consider.
- Of those who would use autonomous mode, ***the typical driver would use the feature slightly less than 50% of the time*** they were driving.

MODULE 2

ELECTRIC VEHICLES (NEEDS & INTENTIONS)

- ***39% of new car buyers are familiar with BEVs*** - only 11% know them very well.
- ***Consideration of alternative vehicles has risen nearly every year since 2011*** – the more recent the purchase, the higher the likelihood an alternative vehicle was considered.
- 24% of new vehicle buyers considered a BEV for their previous vehicle yet ***39% indicate they would consider a BEV for their next vehicle*** – this represents a growth of 63% in consideration.

MODULE 3

SHARED MOBILITY (CAR SHARING & RIDE HAILING)

- Concerning to auto manufacturers is that ***42% of consumers believe that owning a vehicle will be Somewhat or Significantly less important*** in the future.
- Globally, the ***awareness of Uber is more than 3 times higher*** than companies such as Blabla car and Didi among users of Ride Hailing services.
- There ***does not appear to be strong loyalty*** to any Ride Hailing service.

...additional insights available upon request

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THANK **YOU**

For more information about the **2020 Ipsos Mobility Navigator,** please contact:

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