

MOBILE PLANET

KEYS – A WEBINAR SERIES BY IPSOS

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Chief Client Officer

Watch the recording [here](#)

GAME CHANGERS



FUTURE OF MOBILITY

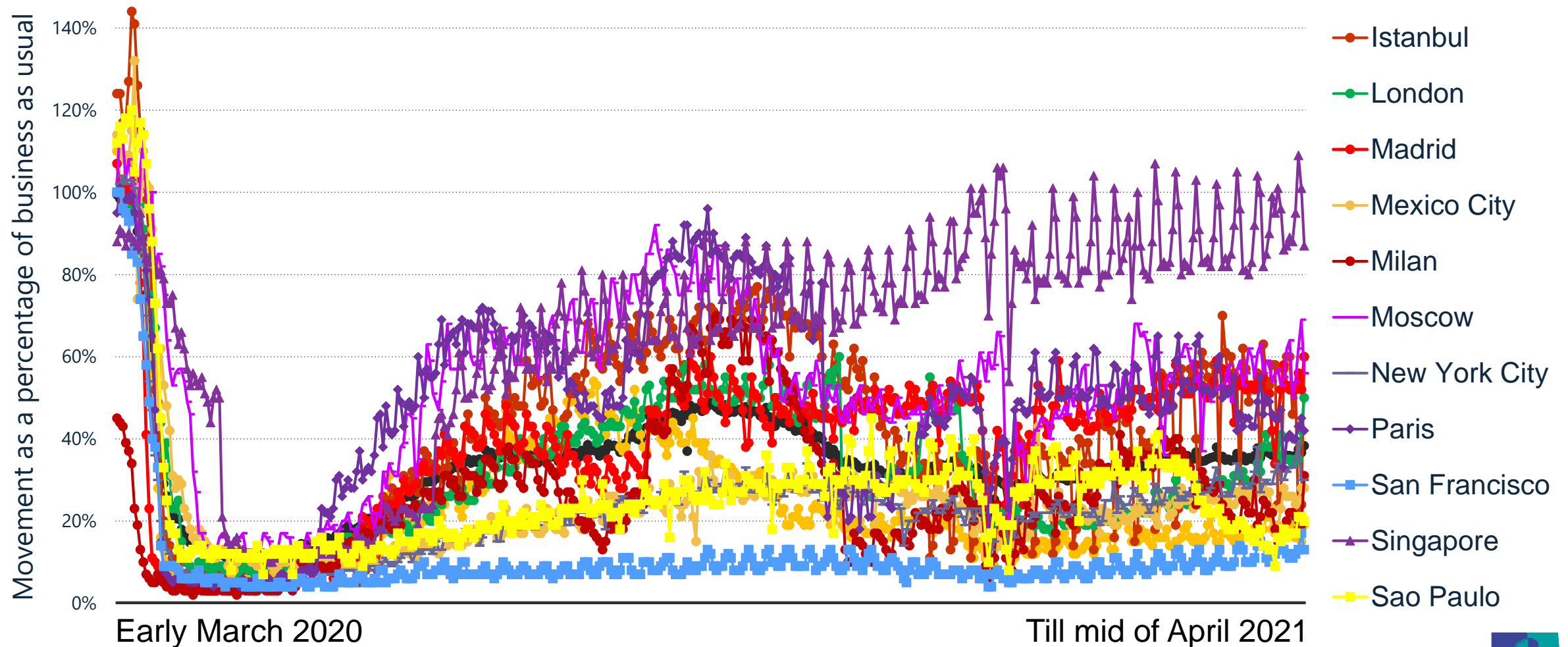


CURRENT STATE OF MOBILITY, IS A STATE OF **IM**MOBILITY



THE CURRENT STATUS OF IMMOBILITY

Urban mobility in Top cities around the world are currently at
40% of their Pre-Covid mobility levels



Source: Citymapper

ALSO MY PERSONAL MOBILITY HAS CHANGED



Grand Cayman	09:15	✳️	AC 972	On-Time
Havana	16:20	✳️	AC 1748	On-Time
Hong Kong	09:55	✳️	AC 015	On-Time
Lima	16:30	✳️	AC 080	On-Time
London/LHR	23:00	✳️	AC 858	On-Time
London/LHR	08:35	✳️	AC 868	On-Time
Mexico City	08:35	✳️	AC 993	On-Time
Montego Bay	09:00	✳️	AC 1804	On-Time
Munich	22:20	✳️	AC 846	Delayed

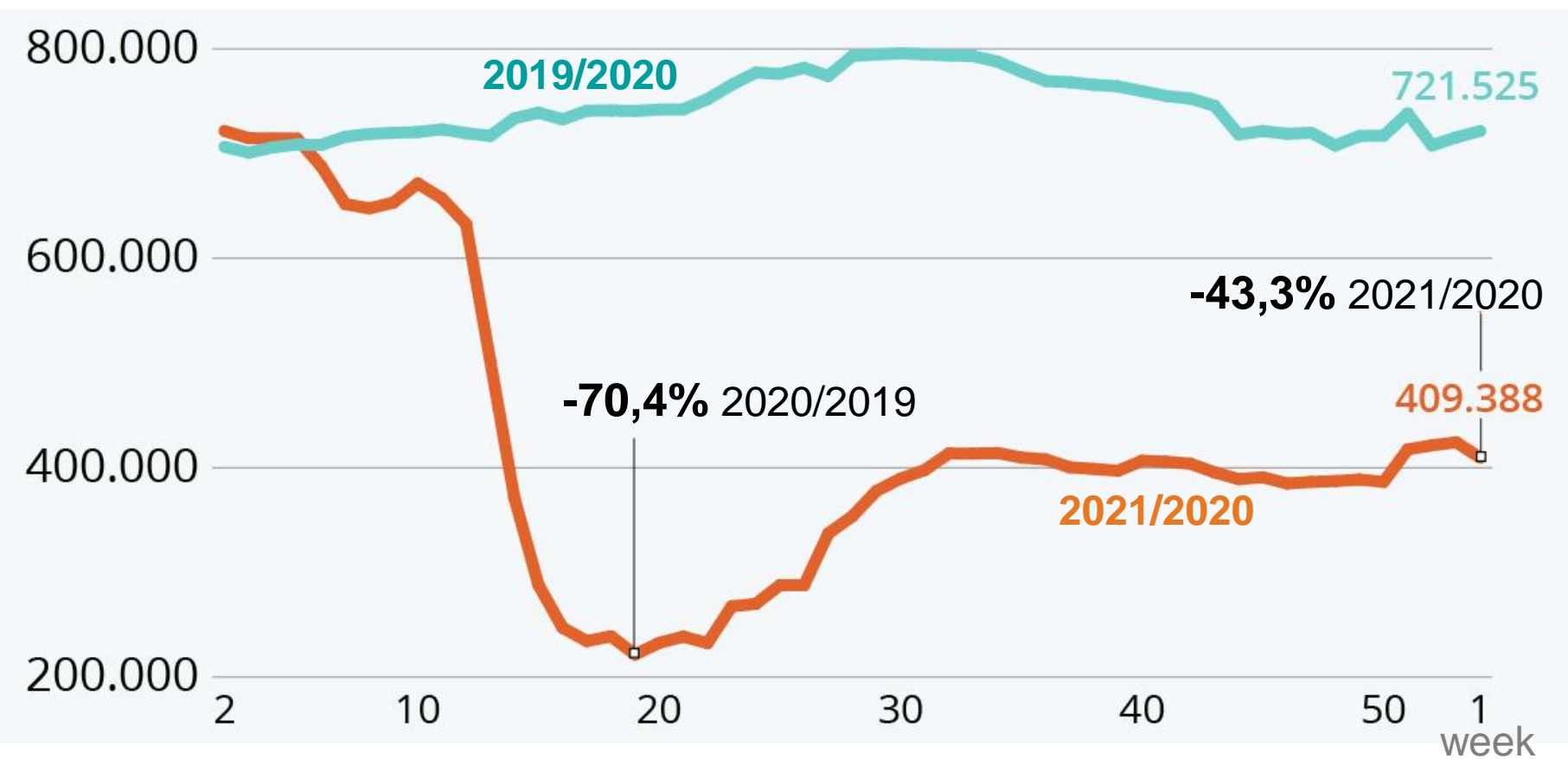


TRENDS

#1 IMMOBILITY

GLOBAL AIR TRAFFIC FAR AWAY FROM RECOVERY

Number of planned departures of regular flights



Source: OAG, statista

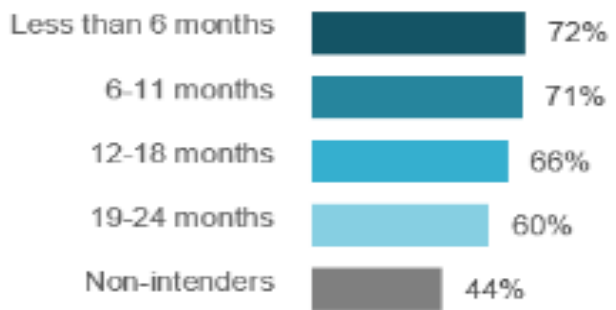
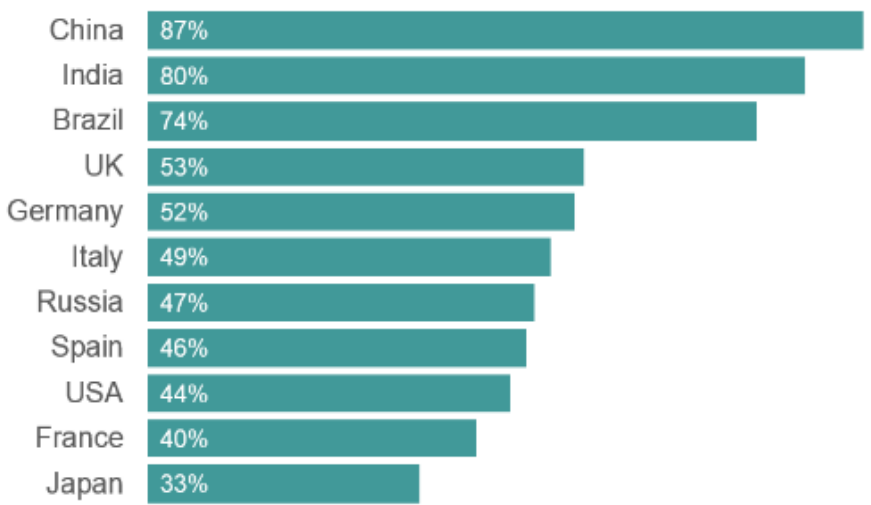
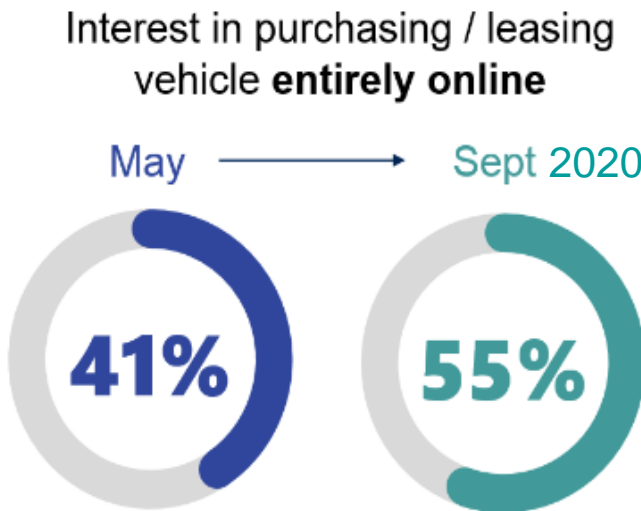
TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

CAR PURCHASES ARE BECOMING DIGITAL

Customers made the switch and Automotive brands now follow



Source: Ipsos Navigator



TRENDS

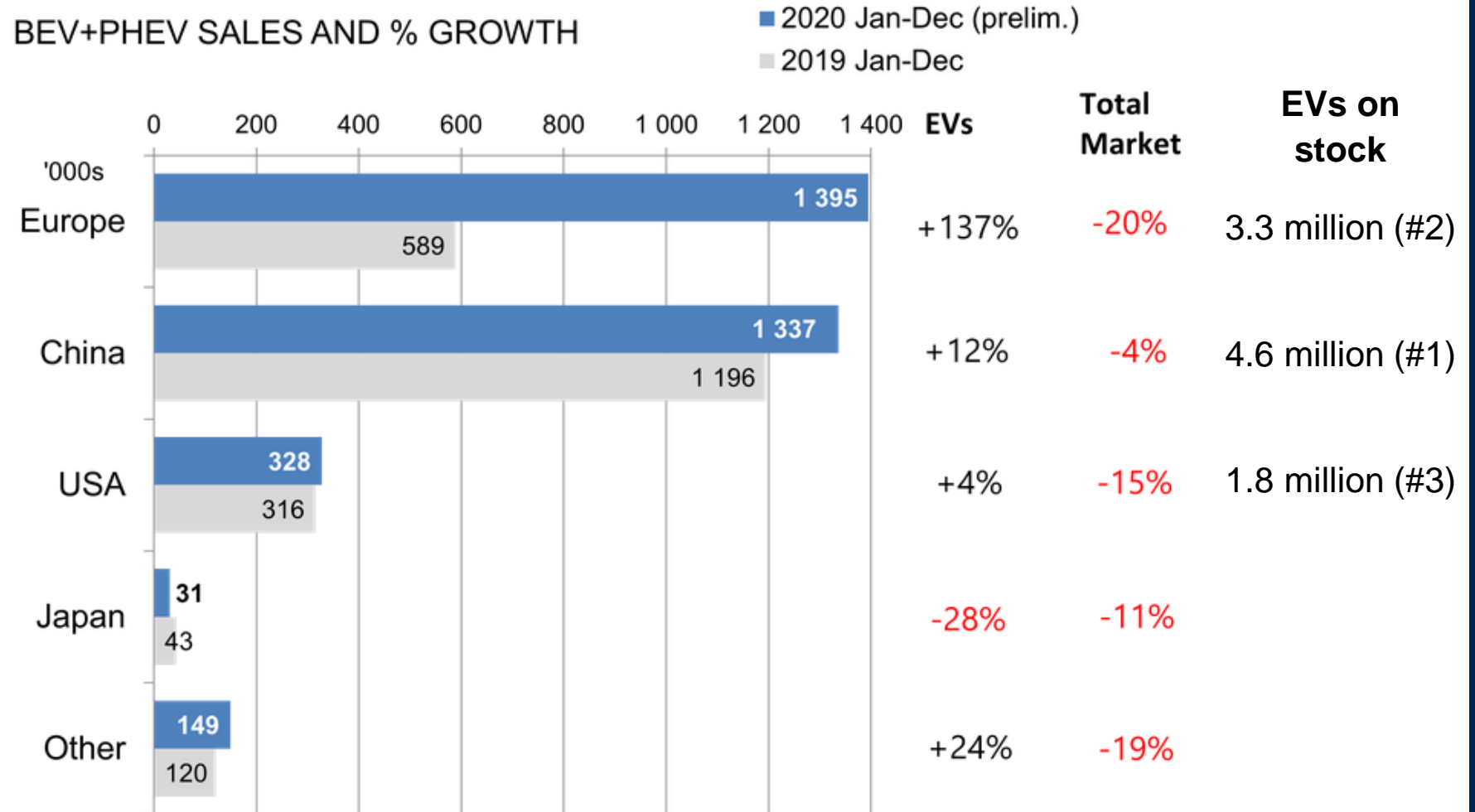
#1 IMMOBILITY

#2 DIGITAL
PURCHASE

#3 ELECTRIFICATION

CAR SALES WERE DOWN – BUT EVs ARE UP

BEV+PHEV SALES AND % GROWTH



Source: EV VOLUMES

Global Total

+43%

-14%

TRENDS

#1 IMMOBILITY

#2 DIGITAL
PURCHASE

#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

FROM TRADITIONAL AUTO TOWARDS TECH

Only **1/3** of new car buyers would consider a
FULLY AUTONOMOUS VEHICLE.

Men under the age of 40 years, who live in a **large metropolitan area** as well as **long-term commuters** show the highest interest in self-driving functions.

But **safety** remains the first barrier to adoption.

While today the interest in most **CONNECTIVITY FEATURES** is high.

Source: Ipsos Navigator

TRENDS

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PURCHASE

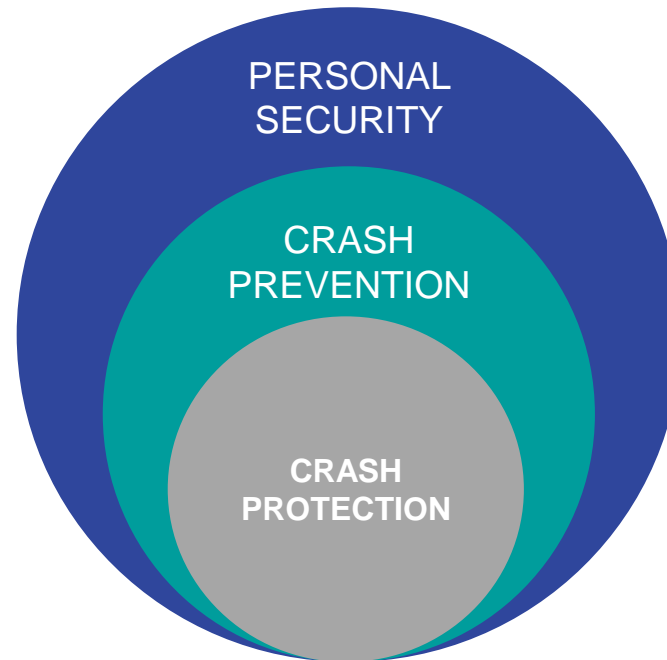
#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

#5 REDEFINED
SAFETY

REDEFINING SAFETY

PRE-COVID

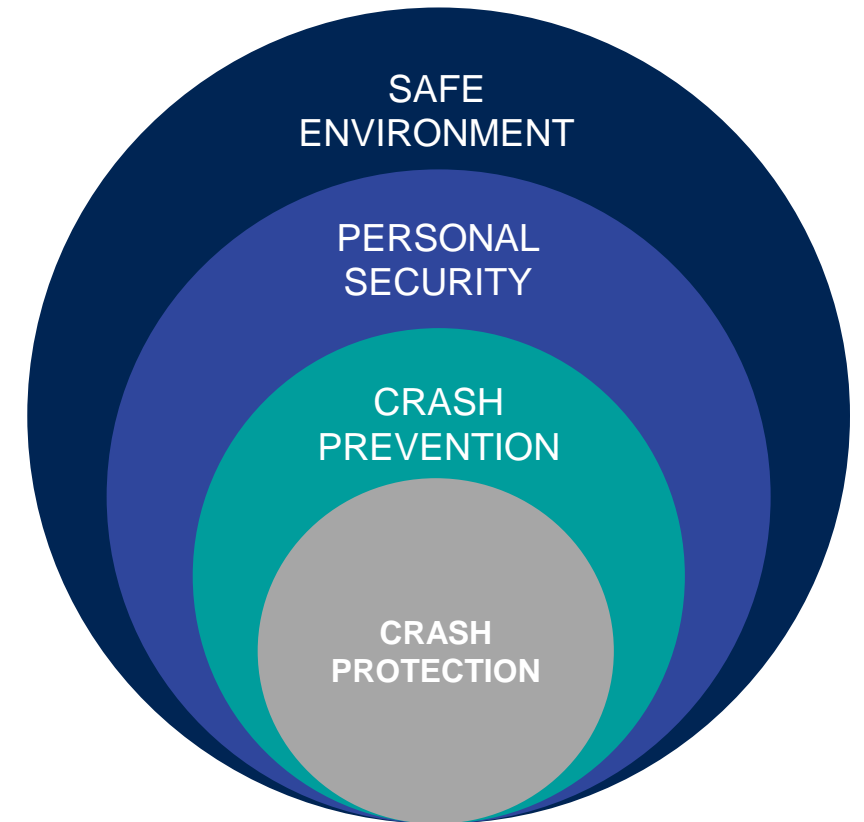


+ as **touchless** as possible

+ incl. **air filtration**

+ creating a “**clean & safe**” feeling in individually owned vehicles

POST-COVID



+ incl. **antibacterial** surfaces

TRENDS

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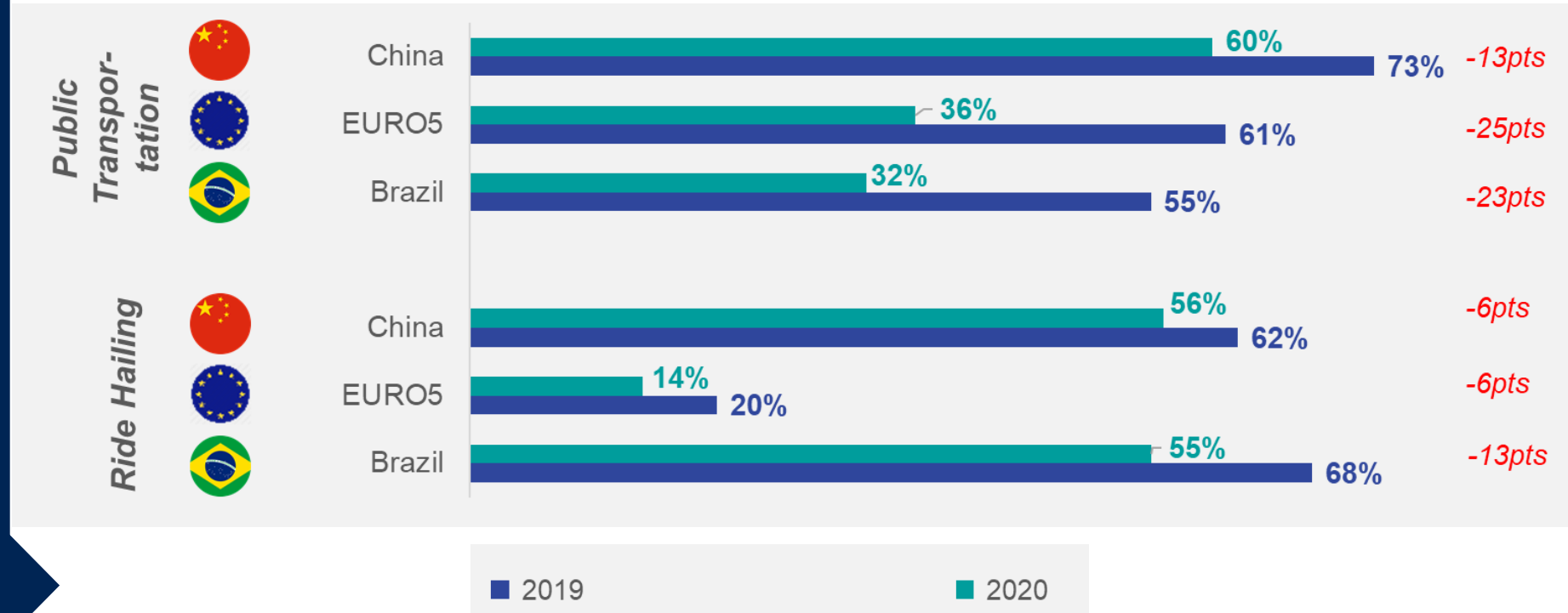
#3 ELECTRIFICATION

#4 CONNECTIVITY
before AUTONOMOUS

#5 REDEFINED
SAFETY

#6 **DECLINE IN
COLLECTIVE
TRANSPORTATION**

DECLINE IN COLLECTIVE TRANSPORTATION



Source: Ipsos Navigator

TRENDS

#1 IMMOBILITY

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TRANSPORTATION

#7 GLOBAL vs. RISE
OF LOCAL

GLOBAL VS. LOCAL

Development of Future Vehicle Operating Systems will be expensive and therefore global



TRENDS

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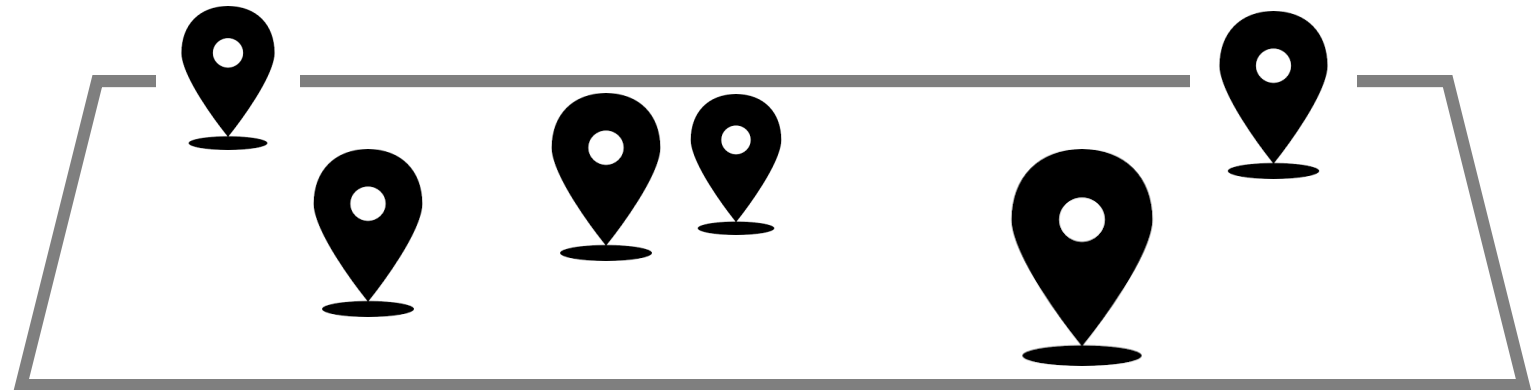
#6 DECLINE IN
COLLECTIVE
TRANSPORTATION

#7 GLOBAL vs. RISE
OF LOCAL

RISE OF LOCAL

Future Mobility Solutions will be local.

- Need to adapt to **local culture, geography, infrastructures** and **environment**.
- Need to understand **local customers** and adapt to **local eco-systems**.
- Public Transportation and Mobility as a Service (MaaS) will integrate **local sustainable micro-mobility services**



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RELATIONSHIP WITH CUSTOMERS
AND ABILITY TO BUILT TRUST
WILL BE CRITICAL SUCCESS FACTORS
IN FUTURE MOBILITY.