# IPSOS 2024 NAVIGATOR

*future of mobility*

## Program Overview

Ipsos Navigator is a syndicated research program that focuses on the key trends and disruptions impacting the automotive and mobility industries.

There are THREE CORE modules, plus the US-only qualitative add-on AutoMOTIVES. Each module is focused on a distinct topic:

1. ELECTRIFICATION + AutoMOTIVES | Spring of 2024
2. DRIVING TECHNOLOGY | Summer of 2024
3. SHARED MOBILITY | Fall of 2024 *(US only)*

This program has been in existence since 2017 and enables subscribers to compare key metrics both over time and between different markets.

## Overview & Deliverables

### METHODOLOGY

20-minute online survey written in the native language of each country. Sample is provided by Ipsos I-say panel and global panel partners.

Large sample sizes for all countries
- 6,000 total completes
- 2,000 completes per country

Respondents represent new vehicle buyers from the previous 10 years / general population for Mobility module

### COUNTRIES

Three core countries:
U.S., China, and Germany

### DELIVERABLES

Study deliverables include per module:

- report
- detailed tables
- dedicated briefing

## Standard Options

| | Global (US/DE/CN) | US Only |
|---|---|---|
| **Bundled Pricing** (all three modules) | $45k USD | $40k USD |
| **Standalone Pricing** (EV + AM or DT Module) | $20k USD Each | $15k USD Each |
| **Shared Mobility** (US Only) | $15k USD | |

## Custom Options

- Subscribers can opt to add additional countries to broaden reach such as countries in Europe, Asia, North America and South America. Ipsos can field globally!
- Subscribers can oversample to get additional targets such as EV intenders, segment or brand owners, key regions such as metro areas or even key demographics such as Gen Z
- Ipsos would replicate the syndicated methodology in the country or sample target chosen
- Subscribers would receive the custom results compared to the standard syndicated results to enable rich contextual insights
- The cost and timing is dependent on scope and sample requirements, but there is timing flexibility add countries or sample as desired. As this can be done during each module or after to leverage the standard methodology

For more information please contact:

**John Kiser**, EVP Auto & Mobility
john.kiser@ipsos.com

# IPSOS ELECTRIFICATION TRENDS REPORT

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2024 EV NAVIGATOR

## Research Overview

A global syndicated survey focused on the awareness, perceptions & attitudes toward Electric vehicles vs. traditional ICE vehicles

**Topics covered:**

- Awareness and purchase consideration of HEVs, PHEVs, and BEVs
- Attitudes towards ICE vehicles vs EVs
- Importance and brand rating on sustainability
- Barriers to BEV consideration (range, charging infrastructure, price, etc.)
- Expectations of BEVs (range, charging, styling, etc.)
- BEV Consideration and reasons for adoption/rejection during last purchase
- Most considered BEV brands + brands most likely to be BEV leaders
- Current vehicle ownership
- Demographics (age, gender, income, etc.)

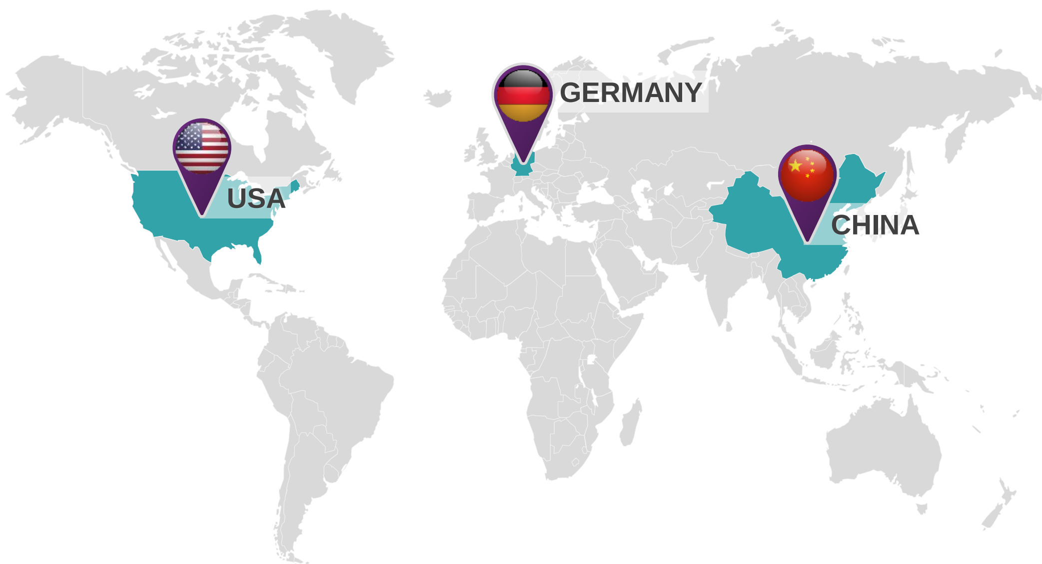
## Key Elements and Questions

- Is BEV consideration continuing to increase? Where is it growing fastest?
- How do different consumer segments feel about BEVs? What are their unique concerns and questions?
- In which markets is BEV consideration highest? What is driving consideration?
- With the growing focus on sustainability, how important is that for consumers? What brands are perceived doing well on it?
- How are range expectations changing as familiarity with BEVs increases?
- How often to BEV owners charge their vehicles…and where? How does actual charging behavior compare to expectations?
- What entities are expected to take the lead in building-out the charging infrastructure?

Large sample sizes for all countries

- 6,000 total completes
- 2,000 completes per country

Respondents represent new vehicle buyers from the previous 10 years

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**John Kiser, EVP** Auto & Mobility
john.kiser@ipsos.com

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# ELECTRIFICATION TRENDS REPORT

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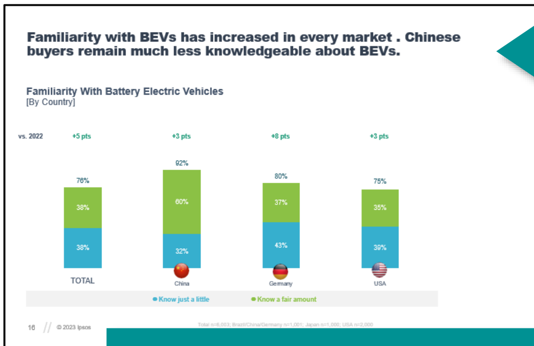
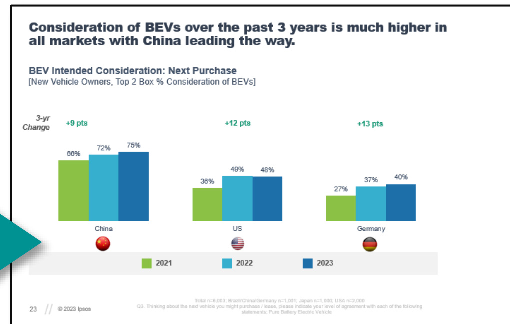
2024 EV NAVIGATOR

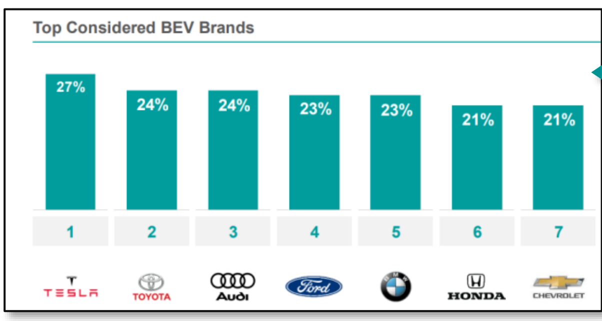
## HIGHLIGHTS FROM PREVIOUS REPORTS



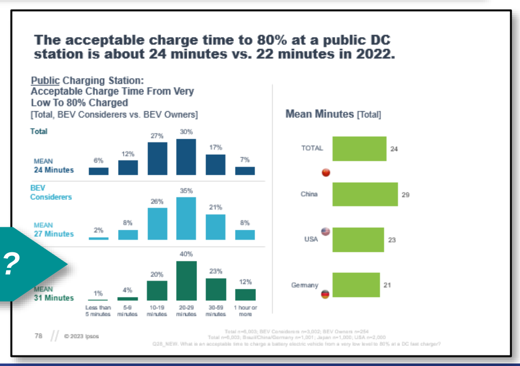

***Where is EV awareness growing?***




***Who is likely to consider an EV?***




***Who are the leading EV brands?***




***Are charging expectations changing?***

## Standard Option

# $20k USD

**EV Navigator Only**

**Publish Date: Spring 2024**

## Custom Options

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# AutoMOTIVES: TIMELY INSIGHTS INTO CONSUMER MOTIVATIONS ABOUT ELECTRIC VEHICLES

The automotive market is *dynamic*, yet the need to understand the automotive consumer is *constant.* Indeed, this is a time of remarkable upheaval in the auto industry. Nowhere is that upheaval more singularly impactful than upon the daily lives of automotive consumers. What they think, feel, say and do resonates throughout the industry.

**Ipsos AutoMOTIVES provides a timely, syndicated qualitative dialogue with US automotive consumers to gain deeper insights into issues facing the auto industry, and to uncover hypotheses for shaping future vehicle development.**

Provided to Ipsos Navigator subscribers as a companion, Ipsos AutoMOTIVES qualitatively explores the “whys” behind consumer opinions and preferences that are revealed in the quantitative learnings. This year, we are exploring insights from our 1st module on Electrification.

Early subscribers to AutoMOTIVES will have the opportunity to contribute questions posed to qualified study participants.

## Consumer Insights and Hypotheses:

### ELECTRIC VEHICLE CONSIDERATION

- What are the main benefits and barriers affecting electric vehicle consideration?
- How does consumer opinion differ between HEVs, PHEVs, and BEVs?
- What must happen in order for BEV consideration to turn into BEV ownership?

### ELECTRIC VEHICLE OWNERSHIP

- How do experiences differ from expectations?
- What limits their trust in ADAS?
- What are BEV owners’ actual charging behavior?
- How has BEV ownership affected their everyday mobility experience?

### ESG BENEFITS AND CONCERNS

- What environmental benefits do consumers see in electric vehicles?
- What concerns or drawbacks do electric vehicles have in the world of ESG?
- How else can electric vehicles impact sustainability?

## What’s Included:

**Two 120-minute focus groups:**

- n=4-6 US BEV Considerers
- n=4-6 US BEV Owners
- Mix of applicable demographics (age, gender, location, etc.)

## What’s Included:

**AutoMOTIVES purchase or subscription includes:**

- Influence into discussion topics (if purchased before field)
- Summary of key qualitative insights and hypotheses
- AV recordings of online focus group interviews
- 45-minute debrief call with research leads

## Investment:

- **AutoMOTIVES is included with Ipsos Navigator subscription**
- Ipsos AutoMOTIVES only (without Navigator) = $2,750
  *(~$15,000 Ad hoc retail value)*

For more information please contact:

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# DRIVING TECHNOLOGY TRENDS REPORT

2024 DRIVING TECH NAVIGATOR

## Research Overview

A global syndicated study that focus on what consumers around the globe think about driving technology.

**Topics covered:**

- Awareness and Purchase Consideration of HEVs, PHEVs, and BEVs
- Awareness and purchase consideration on 20 advanced features, including Fully Autonomous and Semi-Autonomous capabilities
- Perceived advantages and disadvantages of full and semi-Autonomous driving vehicles
- Generational differences in attitudes & perceptions of Autonomous tech
- Brands most trusted to provide autonomous technologies
- Experience with ADAS and Semi-autonomous technologies
- Demographics (age, gender, income, etc.)

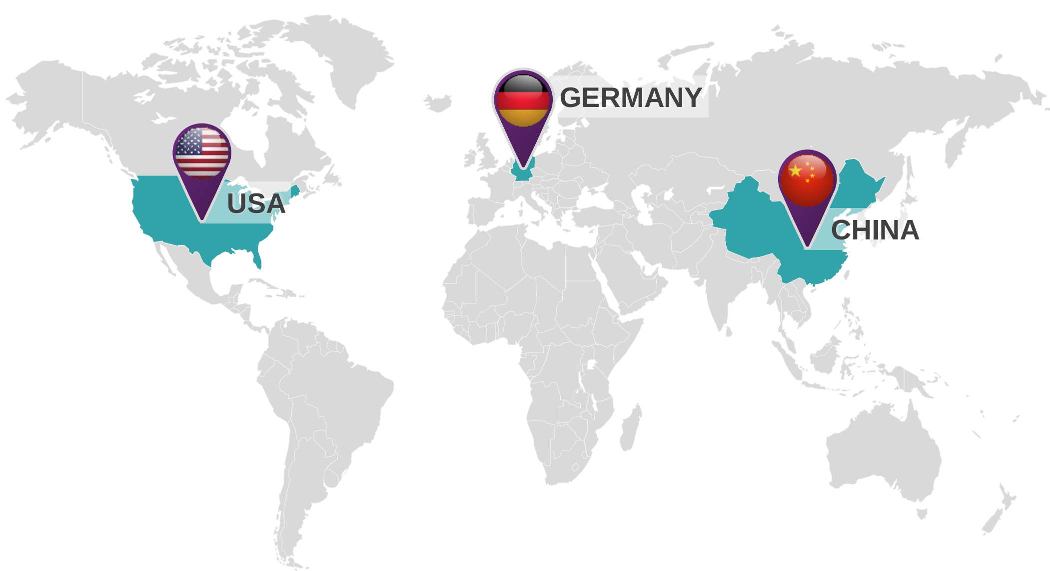
## Key Elements and Questions

- Is awareness and consideration of autonomous tech increasing? Where?
- How do different consumer segments feel about autonomous technologies? What are their unique concerns and questions?
- How do levels of consideration and interest compare for autonomous tech vs. other advanced driving features.
- Which advanced features generate the highest willingness to pay a premium?
- What is the profile of a pro-autonomous buyer? The skeptical buyer?
- What are consumer expectations regarding “when” autonomous technology will be commonplace and trustworthy.

Large sample sizes for all countries

- 6,000 total completes
- 2,000 completes for each country

Respondents represent new vehicle buyers from the previous 10 years





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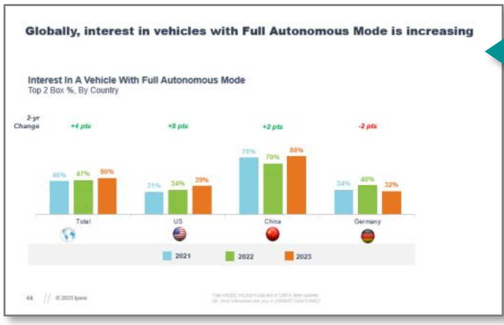
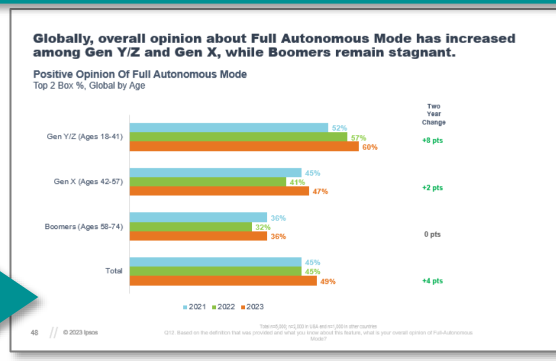
# DRIVING TECHNOLOGY TRENDS REPORT

## 2024 DRIVING TECH NAVIGATOR

## HIGHLIGHTS FROM PREVIOUS REPORTS



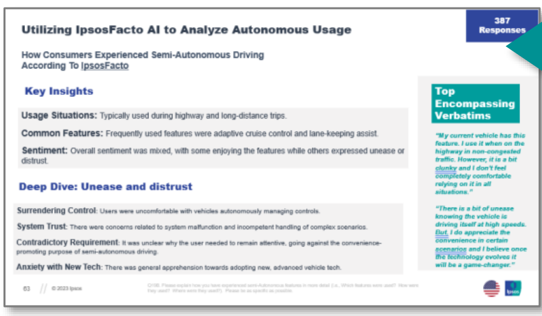

***Where is Autonomous awareness growing?***

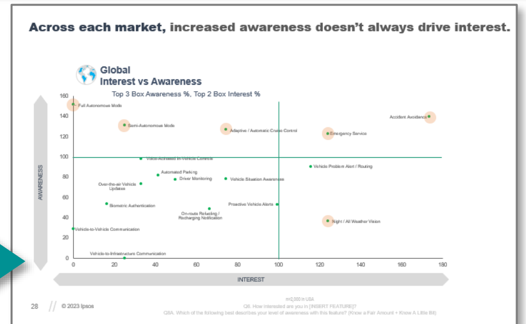



***How do things change by generation?***

IpsosFacto AI

***How do people currently use autonomous driving?***




***What features are most compelling in driving tech?***

## Standard Option

# $20k USD

**Driving Tech Navigator Only, 3 countries**

**Publish Date: Summer 2024**

## Custom Options

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# SHARED MOBILITY TRENDS REPORT

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2024 MOBILITY NAVIGATOR

## Research Overview

**A syndicated survey focused on the perceptions & usage of a range of mobility options.**

Includes 21 different mobility options, including personal vehicles, traditional rental and taxi services, ride hailing, sharing service, and public/mass transport.

**Topics covered:**

- Awareness & future consideration of the different mobility modes, ranging from personally-owned vehicles to micro-mobility services to mass transport
- Recent usage levels for mobility modes
- Ratings of mobility modes utilized
- Advantages, concerns and barriers to adoption by mobility mode
- Demographics. psychographics, and attitudes


**Surveys AVAILABLE in multiple countries But 2024 base offering will be US Only**

## Key Topics & Questions

Large sample sizes reflecting the general population

- 2,000 returns for the US
- Ability to analyze by large metro cities / medium + small cities / suburban cities

- Oversampling is available across key countries such as: France, Germany, China, Japan & Brazil
- Additional sample can be provided by cities / specific targets as well.

What is the performance of alternative mobility modes used?

How do concerns vary by different consumer segments or region?

What brands are seen as the leaders in providing mobility solutions?

## Modes of Mobility Included

- Personally-owned vehicles
- Traditional taxi services
- Traditional rental car services
- Ride hailing services
- Ride sharing services
- Car sharing services
- Car subscription services
- Bike sharing services
- Stand-up/Sit-down scooter sharing services
- Subway and local train services
- Local bus services
- Long-distance bus and rail services
- Micro-transit services

For more information please contact:

**John Kiser, EVP** Auto & Mobility
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# IPSOS SHARED MOBILITY TRENDS REPORT

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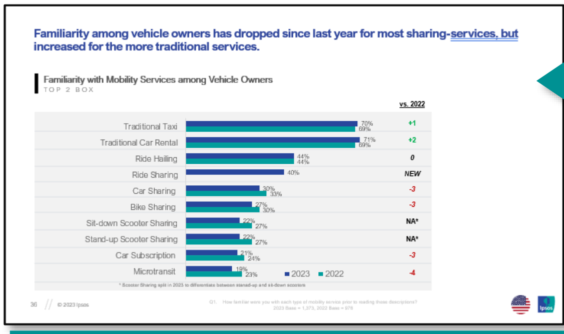
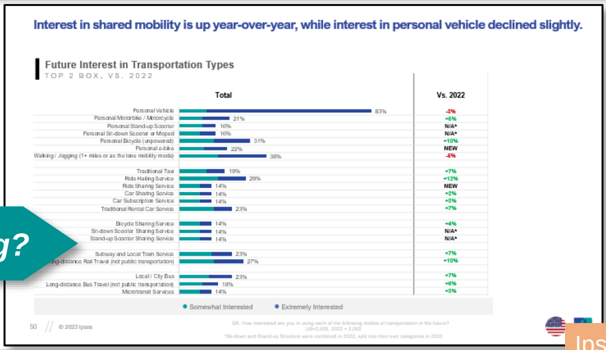
2024 MOBILITY NAVIGATOR

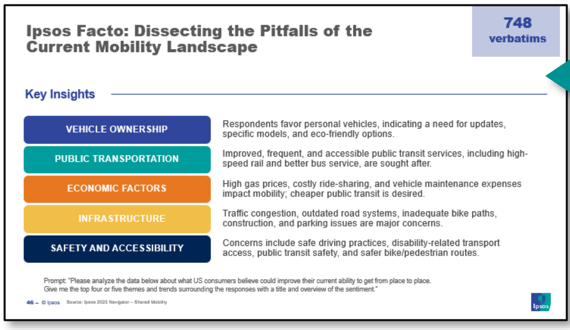
## HIGHLIGHTS FROM PREVIOUS REPORTS




***How is familiarity growing across mobility options?***

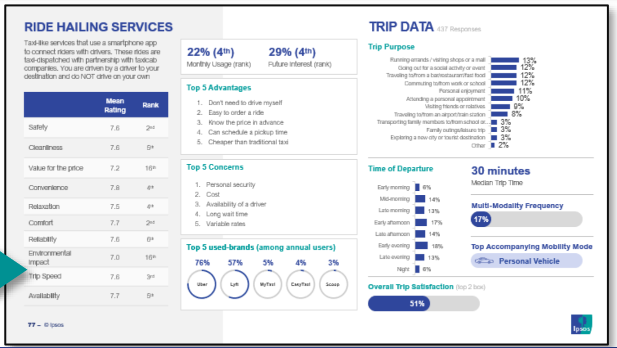



***How is future usage interest changing?***




IpsosFacto AI

***What can improve the current mobility landscape?***




***How do people view and use each shared mobility service?***

## Standard Option

**$15k USD**

**Shared Mobility Navigator, US Only**

**Publish Date: Fall 2024**

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