IPSOS 2023 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 TWO core modules, plus an optional THIRD module each focused on a distinct topic:

1. ELECTRIFICATION | Spring of 2023
2. DRIVING TECHNOLOGY | Summer of 2023
3. MOBILITY | Fall of 2023 *(various sample options, standard is 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 for the US / 1,000 completes for each additional country

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

COUNTRIES

Five Core countries: U.S., China, Japan, Brazil and Germany

DELIVERABLES

Study deliverables include per module:

- report
- detailed tables
- dedicated briefing

Standard Options

$40k USD
both core modules, all countries

$25k USD
for one module, all countries

$15k USD
for Mobility Nav only

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:

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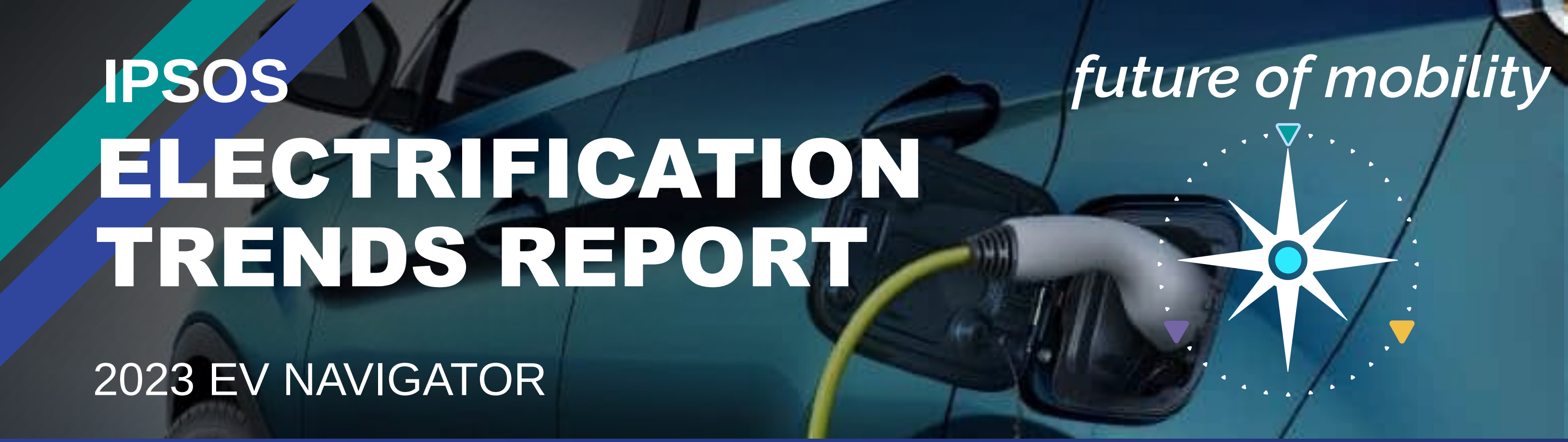
ELECTRIFICATION TRENDS REPORT

2023 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

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Respondents represent new vehicle buyers from the previous 10 years

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IPSOS
ELECTRIFICATION TRENDS REPORT

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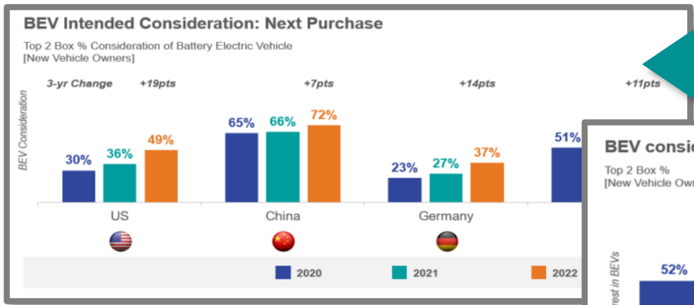
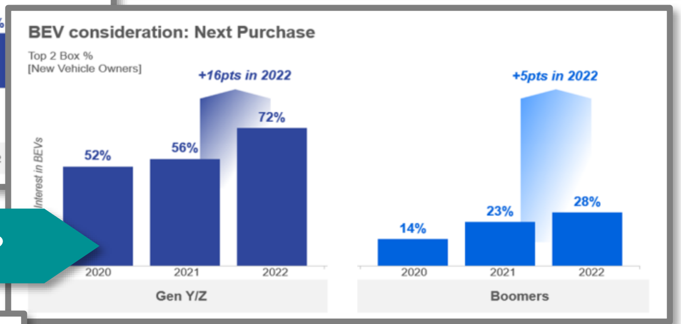
2023 EV NAVIGATOR

HIGHLIGHTS FROM PREVIOUS REPORTS

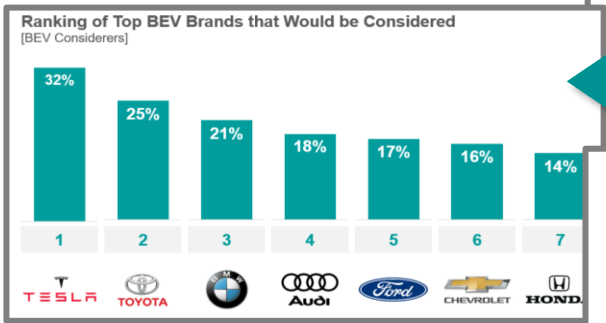
Where is EV awareness growing?



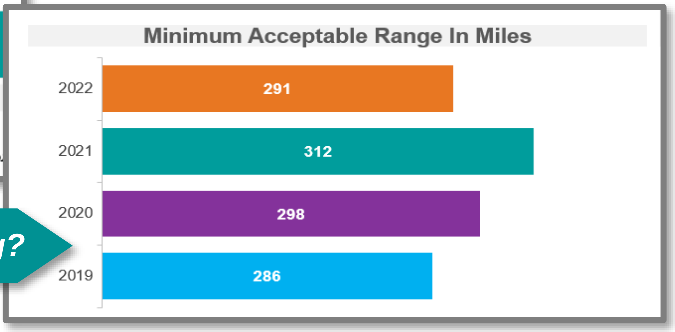
What's customers are interested?



Who are the leading EV brands?



Are charging expectations changing?



Standard Option

$25k USD

EV Navigator Only

Publish Date: April 2023

Custom Options

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DRIVING TECHNOLOGY TRENDS REPORT

2023 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.)

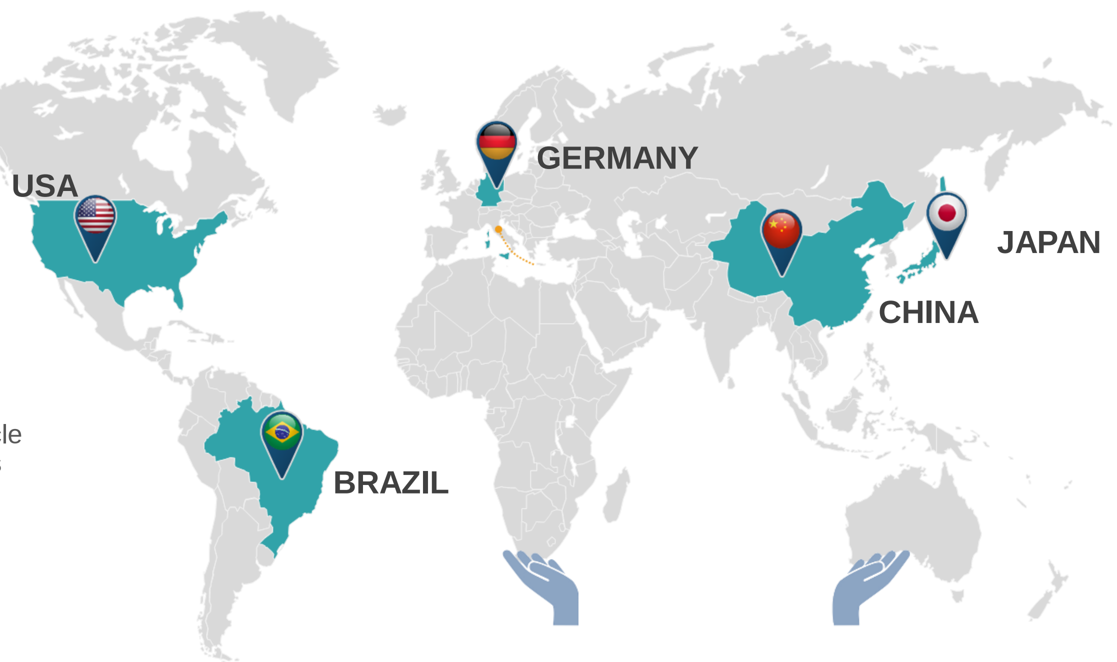
Key Elements and Questions

- 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 the US / 1,000 completes for each additional country

Respondents represent new vehicle buyers from the previous 10 years



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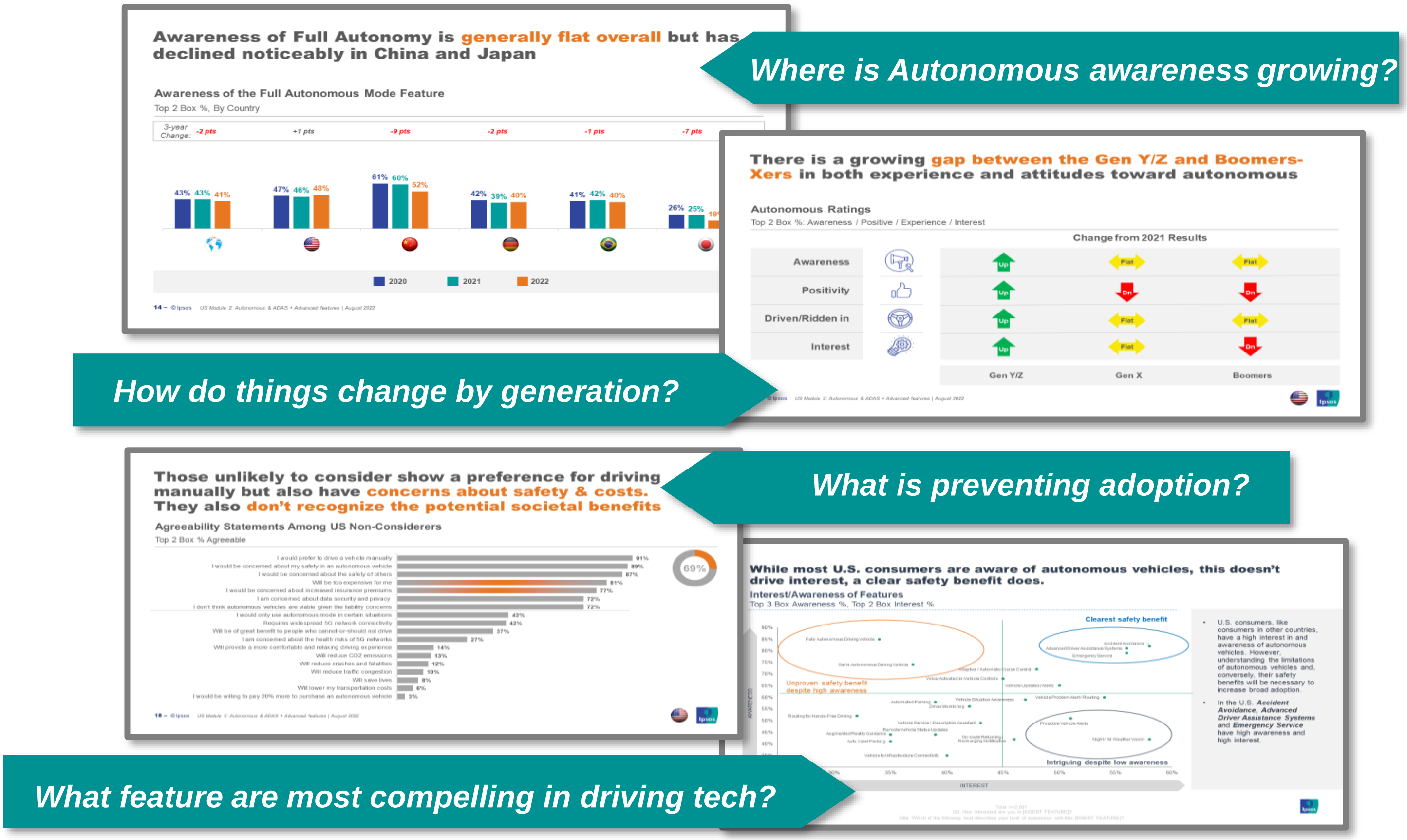
DRIVING TECHNOLOGY TRENDS REPORT

2023 DRIVING TECH NAVIGATOR

HIGHLIGHTS FROM PREVIOUS REPORTS



Standard Option

$25k USD

Driving Tech Navigator Only

Publish Date: Aug. 2023

Custom Options

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SHARED MOBILITY TRENDS REPORT

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2023 MOBILITY NAVIGATOR

Research Overview

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

Includes 17 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 2023 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

Mobility Modes included:

- Personally-owned vehicles.
- Traditional Taxi services
- Traditional Rental Car services
- Ride Hailing services
- Car Sharing services
- Car Subscription services
- Bike and Scooter Sharing services
- Subway and local train services
- Local Bus services
- Long-distance Bus and Rail services
- Micro-transit services

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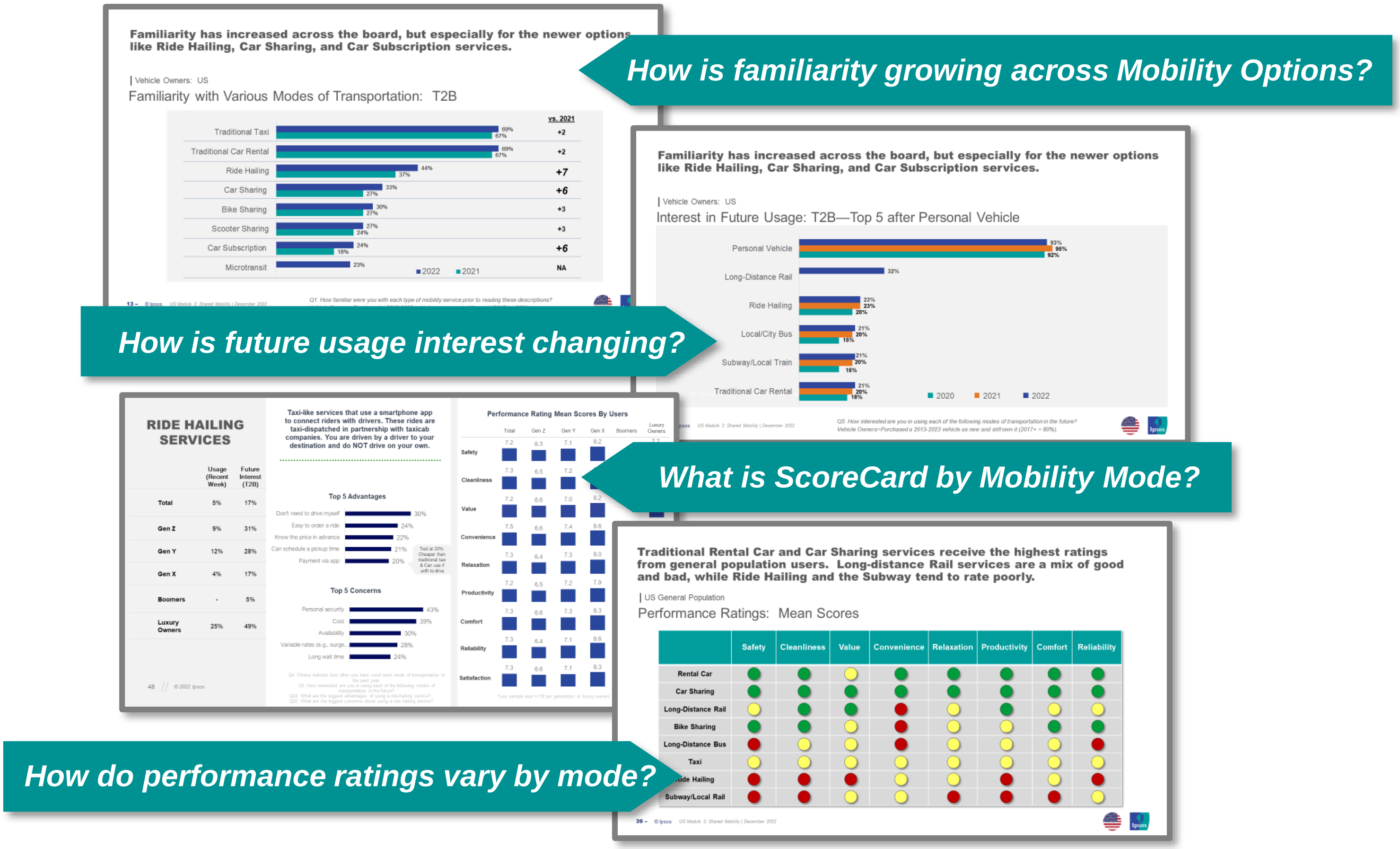
Ipsos

IPSOS SHARED MOBILITY TRENDS REPORT

2023 MOBILITY NAVIGATOR

HIGHLIGHTS FROM PREVIOUS REPORTS



Standard Option

$15k USD

Mobility Navigator Only

Publish Date: Nov. 2023

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