PUBLIC POLL FINDINGS AND METHODOLOGY

Ipsos Transportation Poll

Washington, DC, May 27, 2020

These are the findings of an Ipsos poll conducted between May 19-20, 2020. For this survey, a sample of 1,114 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English. The poll has a credibility interval of plus or minus 3.3 percentage points for all respondents.

For full results, please refer to the following annotated questionnaire:

Full Annotated Questionnaire:

1. Before the lockdowns related to Coronavirus, how did you most often commute to work?

	Total (N=1,114)
Drove alone in a vehicle you own	47%
Walk	8%
Public bus	6%
Public rail (light rail, subway, elevated, etc.)	4%
Bicycle	3%
Taxi or rideshare	3%
Carpooled	3%
Other	1%
I work from home	7%
I do not work	30%

2. When all the coronavirus-related stay at home orders end, do you expect your work commute to change?

	Total
Yes	21%
No	65%
Don't know/refused	13%

3. **[Only asked if work commute expected to change]** How do you expect your work commute to change?

	Total (N=217)
I expect to drive to work more often	46%
I expect to commute less, in any form, because I will be working from home more frequently	30%
I expect to take public transportation (bus or rail) more often	9%
I expect to walk or bike more often	9%
Don't know	7%

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Chris Jackson**
Senior Vice President, US, Public Affairs, Ipsos
Email: chris.jackson@ipsos.com
Tel: +1 202 420-2025

PUBLIC POLL FINDINGS AND METHODOLOGY

4. Do you own or lease a vehicle for personal use?

	Total
Yes, I own a personal vehicle	79%
Yes, I lease a personal vehicle	6%
No, I do not currently own a personal vehicle, but I am considering buying or leasing within the next year	5%
No, I do not currently own a personal vehicle, and I am not considering buying or leasing one	10%
Yes (Net)	*85%*
No (Net)	*15%*

5. **[Only asked if own/lease a vehicle]** Before the COVID-19 outbreak, how frequently did you use your personal vehicle for each of the following:

Total Frequently + Occasionally Summary

	Total (N=922)
Using traditional drive thru services (e.g., food, banking, etc.)	90%
Driving children to school **(N=235)**	83%
Taking a trip/get-away vacation by vehicle	80%
Taking a leisurely drive/cruising	79%
Going for a fun, performance drive	53%
Going to a drive-in restaurant where you stay in your vehicle and food is brought to you (e.g., Sonic, A&W, etc.)	52%
Using your vehicle for a picnic/tailgate like gathering	41%
Using a drive-thru convenience store	39%
Attending a wedding or graduation ceremony within your vehicle	37%
Using your vehicle to go camping	31%
Going off-roading/adventure driving	26%
Going to a drive-in movie theater	25%
Towing a camper/boat or other recreational vehicle	20%
Attending a drive-up religious service	17%

a. Taking a leisurely drive/cruising

	Total
Very frequently	13%
Somewhat frequently	23%
Occasionally	43%
Not at all	21%

PUBLIC POLL FINDINGS AND METHODOLOGY

b. **[Only asked if children under 18 in the household]** Driving children to school

	Total (N=235)
Very frequently	45%
Somewhat frequently	13%
Occasionally	25%
Not at all	17%

c. Taking a trip/get-away vacation by vehicle

	Total
Very frequently	11%
Somewhat frequently	24%
Occasionally	46%
Not at all	20%

d. Going for a fun, performance drive

	Total
Very frequently	9%
Somewhat frequently	14%
Occasionally	30%
Not at all	47%

e. Going off-roading/adventure driving

	Total
Very frequently	4%
Somewhat frequently	7%
Occasionally	15%
Not at all	74%

f. Using your vehicle to go camping

	Total
Very frequently	4%
Somewhat frequently	7%
Occasionally	19%
Not at all	69%

g. Using your vehicle for a picnic/tailgate like gathering

	Total
Very frequently	4%
Somewhat frequently	11%
Occasionally	25%
Not at all	59%

h. Towing a camper/boat or other recreational vehicle

	Total
Very frequently	4%
Somewhat frequently	6%
Occasionally	10%
Not at all	80%

i. Using traditional drive-thru services (e.g., food, banking, etc.)

	Total
Very frequently	20%
Somewhat frequently	30%
Occasionally	40%
Not at all	10%

j. Going to a drive-in movie theater

	Total
Very frequently	5%
Somewhat frequently	6%
Occasionally	14%
Not at all	75%

k. Attending a drive-up religious service

	Total
Very frequently	4%
Somewhat frequently	6%
Occasionally	7%
Not at all	83%

l. Attending a wedding or graduation ceremony within your vehicle

	Total
Very frequently	6%
Somewhat frequently	7%
Occasionally	23%
Not at all	63%

m. Going to a drive-in restaurant where you stay in your vehicle and food is brought to you (e.g., Sonic, A&W, etc.)

	Total
Very frequently	7%
Somewhat frequently	13%
Occasionally	32%
Not at all	48%

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Chris Jackson**
Senior Vice President, US, Public Affairs, Ipsos
Email: chris.jackson@ipsos.com
Tel: +1 202 420-2025

n. Using a drive-thru convenience store

	Total
Very frequently	8%
Somewhat frequently	10%
Occasionally	21%
Not at all	61%

6. **[Only asked if own/lease a vehicle]** Regardless of how frequently you used your vehicle for these activities prior to the COVID-19 outbreak, please indicate how likely you are to do so as restrictions are lifted.

Total More Likely Summary

	Total (N=922)
Attending a drive-up religious service	10%
Going to a drive-in movie theater	14%
Going off-roading/adventure driving	8%
Using a drive-thru convenience store	13%
Using traditional drive thru services (e.g., food, banking, etc.)	20%
Going to a drive-in restaurant where you stay in your vehicle and food is brought to you (e.g., Sonic, A&W, etc.)	16%
Taking a leisurely drive/cruising	17%
Driving children to school **(N=235)**	17%
Going for a fun, performance drive	12%
Using your vehicle for a picnic/tailgate like gathering	11%
Taking a trip/get-away vacation by vehicle	16%
Using your vehicle to go camping	7%
Towing a camper/boat or other recreational vehicle	5%
Attending a wedding or graduation ceremony within your vehicle	11%

a. Taking a leisurely drive/cruising

	Total
More likely to do now than before the Coronavirus outbreak	17%
Just as likely to do now as I was before the Coronavirus outbreak	66%
Less likely to do than I was before the Coronavirus outbreak	18%

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Chris Jackson**
Senior Vice President, US, Public Affairs, Ipsos
Email: chris.jackson@ipsos.com
Tel: +1 202 420-2025

b. **[Only asked if children in the household]** Driving children to school

	Total (N=235)
More likely to do now than before the Coronavirus outbreak	17%
Just as likely to do now as I was before the Coronavirus outbreak	60%
Less likely to do than I was before the Coronavirus outbreak	23%

c. Taking a trip/get-away vacation by vehicle

	Total
More likely to do now than before the Coronavirus outbreak	16%
Just as likely to do now as I was before the Coronavirus outbreak	60%
Less likely to do than I was before the Coronavirus outbreak	24%

d. Going for a fun, performance drive

	Total
More likely to do now than before the Coronavirus outbreak	12%
Just as likely to do now as I was before the Coronavirus outbreak	66%
Less likely to do than I was before the Coronavirus outbreak	22%

e. Going off-roading/adventure driving

	Total
More likely to do now than before the Coronavirus outbreak	8%
Just as likely to do now as I was before the Coronavirus outbreak	61%
Less likely to do than I was before the Coronavirus outbreak	31%

Contact: **Chris Jackson**
Senior Vice President, US, Public Affairs, Ipsos
Email: chris.jackson@ipsos.com
Tel: +1 202 420-2025

f. Using your vehicle to go camping

	Total
More likely to do now than before the Coronavirus outbreak	7%
Just as likely to do now as I was before the Coronavirus outbreak	63%
Less likely to do than I was before the Coronavirus outbreak	30%

g. Using your vehicle for a picnic/tailgate like gathering

	Total
More likely to do now than before the Coronavirus outbreak	11%
Just as likely to do now as I was before the Coronavirus outbreak	61%
Less likely to do than I was before the Coronavirus outbreak	28%

h. Towing a camper/boat or other recreational vehicle

	Total
More likely to do now than before the Coronavirus outbreak	5%
Just as likely to do now as I was before the Coronavirus outbreak	62%
Less likely to do than I was before the Coronavirus outbreak	34%

i. Using traditional drive thru services (e.g., food, banking, etc.)

	Total
More likely to do now than before the Coronavirus outbreak	20%
Just as likely to do now as I was before the Coronavirus outbreak	66%
Less likely to do than I was before the Coronavirus outbreak	14%

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Chris Jackson**
Senior Vice President, US, Public Affairs, Ipsos
Email: chris.jackson@ipsos.com
Tel: +1 202 420-2025

j. Going to a drive-in movie theater

	Total
More likely to do now than before the Coronavirus outbreak	14%
Just as likely to do now as I was before the Coronavirus outbreak	58%
Less likely to do than I was before the Coronavirus outbreak	27%

k. Attending a drive-up religious service

	Total
More likely to do now than before the Coronavirus outbreak	10%
Just as likely to do now as I was before the Coronavirus outbreak	57%
Less likely to do than I was before the Coronavirus outbreak	33%

l. Attending a wedding or graduation ceremony within your vehicle

	Total
More likely to do now than before the Coronavirus outbreak	11%
Just as likely to do now as I was before the Coronavirus outbreak	58%
Less likely to do than I was before the Coronavirus outbreak	31%

m. Going to a drive-in restaurant where you stay in your vehicle and food is brought to you (e.g., Sonic, A&W, etc.)

	Total
More likely to do now than before the Coronavirus outbreak	16%
Just as likely to do now as I was before the Coronavirus outbreak	64%
Less likely to do than I was before the Coronavirus outbreak	20%

n. Using a drive-thru convenience store

	Total
More likely to do now than before the Coronavirus outbreak	13%
Just as likely to do now as I was before the Coronavirus outbreak	64%
Less likely to do than I was before the Coronavirus outbreak	13%

7. **[Only asked if own/lease a vehicle]** Overall, as restrictions are lifted, do you anticipate:

	Total (N=922)
Driving more miles than I did before the outbreak	14%
Driving about the same number of miles as I did before the outbreak	57%
Driving fewer miles than I did before the outbreak	25%
Don't know	4%

8. Considering the impact of COVID-19, if you were to shop for a new vehicle, how interested would you be in each of the following features?

Total Want Summary (“It is essential…” + “I would prefer…but it is not essential”)

	Total
Interior cabin air filtration system	67%
In-vehicle connectivity/WiFi	62%
Touchless door and liftgate/trunk activated as you approach or through the click of a button on your key-fob	61%
Interior surfaces that are anti-bacterial / germ resistant	59%
Additional charging ports dedicated for each of the front and rear seat passengers	59%
Noise cancellation that uses sound canceling technology to reduce external noise such as wind, road and engine noise	57%
Enhanced, premium audio and entertainment system	56%
Automatic parking system in which the vehicle will identify a suitable parking space and complete the entire parking maneuver	44%
Audio sound zones that isolate sound for each passenger and does not interfere with the sound comfort of others in the vehicle	37%
Dedicated hot and cold storage areas	37%
Rear-seat entertainment system	33%
Tailgate/picnic package with charge points for operating external devices	28%

a. Touchless door and liftgate/trunk activated as you approach or through the click of a button on your key-fob

	Total
It is essential that I have this feature in my next vehicle	15%
I would prefer this feature in my next vehicle, but it is not essential	46%
I do not want this feature in my next vehicle	11%
I have no preference for if this this feature is in my next vehicle or not	28%

b. Interior surfaces that are anti-bacterial / germ resistant

	Total
It is essential that I have this feature in my next vehicle	14%
I would prefer this feature in my next vehicle, but it is not essential	46%
I do not want this feature in my next vehicle	9%
I have no preference for if this this feature is in my next vehicle or not	32%

c. Interior cabin air filtration system

	Total
It is essential that I have this feature in my next vehicle	19%
I would prefer this feature in my next vehicle, but it is not essential	49%
I do not want this feature in my next vehicle	7%
I have no preference for if this this feature is in my next vehicle or not	26%

d. Enhanced, premium audio and entertainment system

	Total
It is essential that I have this feature in my next vehicle	17%
I would prefer this feature in my next vehicle, but it is not essential	38%
I do not want this feature in my next vehicle	13%
I have no preference for if this this feature is in my next vehicle or not	32%

e. In-vehicle connectivity/WiFi

	Total
It is essential that I have this feature in my next vehicle	16%
I would prefer this feature in my next vehicle, but it is not essential	45%
I do not want this feature in my next vehicle	11%
I have no preference for if this this feature is in my next vehicle or not	28%

f. Rear-seat entertainment system

	Total
It is essential that I have this feature in my next vehicle	7%
I would prefer this feature in my next vehicle, but it is not essential	27%
I do not want this feature in my next vehicle	28%
I have no preference for if this this feature is in my next vehicle or not	38%

g. Additional charging ports dedicated for each of the front and rear seat passengers

	Total
It is essential that I have this feature in my next vehicle	14%
I would prefer this feature in my next vehicle, but it is not essential	44%
I do not want this feature in my next vehicle	13%
I have no preference for if this this feature is in my next vehicle or not	28%

h. Audio sound zones that isolate sound for each passenger and does not interfere with the sound comfort of others in the vehicle

	Total
It is essential that I have this feature in my next vehicle	7%
I would prefer this feature in my next vehicle, but it is not essential	30%
I do not want this feature in my next vehicle	21%
I have no preference for if this this feature is in my next vehicle or not	42%

i. Dedicated hot and cold storage areas

	Total
It is essential that I have this feature in my next vehicle	7%
I would prefer this feature in my next vehicle, but it is not essential	30%
I do not want this feature in my next vehicle	18%
I have no preference for if this this feature is in my next vehicle or not	45%

j. Tailgate/picnic package with charge points for operating external devices

	Total
It is essential that I have this feature in my next vehicle	5%
I would prefer this feature in my next vehicle, but it is not essential	22%
I do not want this feature in my next vehicle	29%
I have no preference for if this this feature is in my next vehicle or not	43%

k. Automatic parking system in which the vehicle will identify a suitable parking space and complete the entire parking maneuver

	Total
It is essential that I have this feature in my next vehicle	9%
I would prefer this feature in my next vehicle, but it is not essential	34%
I do not want this feature in my next vehicle	17%
I have no preference for if this this feature is in my next vehicle or not	39%

l. Noise cancellation that uses sound canceling technology to reduce external noise such as wind, road and engine noise

	Total
It is essential that I have this feature in my next vehicle	12%
I would prefer this feature in my next vehicle, but it is not essential	44%
I do not want this feature in my next vehicle	13%
I have no preference for if this this feature is in my next vehicle or not	31%

9. What is your view of self-driving cars?

	Total
Very positive	10%
Somewhat positive	27%
Somewhat negative	26%
Very negative	25%
Don't know	11%
Positive (Net)	*37%*
Negative (Net)	*52%*

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Chris Jackson**
Senior Vice President, US, Public Affairs, Ipsos
Email: chris.jackson@ipsos.com
Tel: +1 202 420-2025

10. Electric cars are cars that need to be charged and then run on electricity. What is your view of electric cars?

	Total
Very positive	19%
Somewhat positive	38%
Somewhat negative	22%
Very negative	13%
Don't know	8%
Positive (Net)	*58%*
Negative (Net)	*34%*

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Chris Jackson**
Senior Vice President, US, Public Affairs, Ipsos
Email: chris.jackson@ipsos.com
Tel: +1 202 420-2025

PUBLIC POLL FINDINGS AND METHODOLOGY

About the Study

These are some of the findings of an Ipsos poll conducted between May 19-20, 2020. For this survey, a sample of 1,114 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.

The sample for this study was randomly drawn from Ipsos' online panel (see link below for more info on "Access Panels and Recruitment"), partner online panel sources, and "river" sampling (see link below for more info on the Ipsos "Ampario Overview" sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2016 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Posthoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.3 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,114, DEFF=1.5, adjusted Confidence Interval=+/-4.8 percentage points).

For more information on this news release, please contact:

Mallory Newall
Director, US
Public Affairs
+1 202 420-2014
mallory.newall@ipsos.com

Kate Silverstein
Media Relations Specialist, US
Public Affairs
+1 718 755-8829
kate.silverstein@ipsos.com

PUBLIC POLL FINDINGS AND METHODOLOGY

About Ipsos

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

2020 K Street, NW, Suite 410
Washington DC 20006
+1 202 463-7300

Contact: **Chris Jackson**
Senior Vice President, US, Public Affairs, Ipsos
Email: chris.jackson@ipsos.com
Tel: +1 202 420-2025

GAME CHANGERS