

# RENAULT EWAYS

## Electrified mobility in Europe: what perspectives?

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**GAME CHANGERS**



# OBJECTIVES AND METHODOLOGICAL APPROACH

# METHODOLOGICAL APPROACH



## Target

- Representative sample of individuals aged 18 and over
- Sample representativeness : gender, age and regions (*Eurostats data - 2018*)



## Sample

- Study conducted in 5 countries:
  - France
  - Germany
  - Italy
  - Spain
  - UK

A total of 5000 interviews were conducted (*i.e., 1,000 interviews per country*).



## DATA COLLECTION

- Online collection from the Ipsos panel
- Fieldwork from 12nd to 21st of August 2020
- Device-agnostic questionnaire with an average length of 13 minutes



## DATA PROCESSING

- The data were adjusted on the basis of 3 criteria: gender, age and region.
- The results were analysed on the whole for all countries, then by country.

# KEY RESULTS



# EUROPEANS AND CLIMATE CHANGE?

A context of opinion very favourable to the development of less polluting mobility, high expectations vis-à-vis manufacturers

# 1

# Europeans and climate climate?

**A societal context marked by  
strong environmental concerns.**

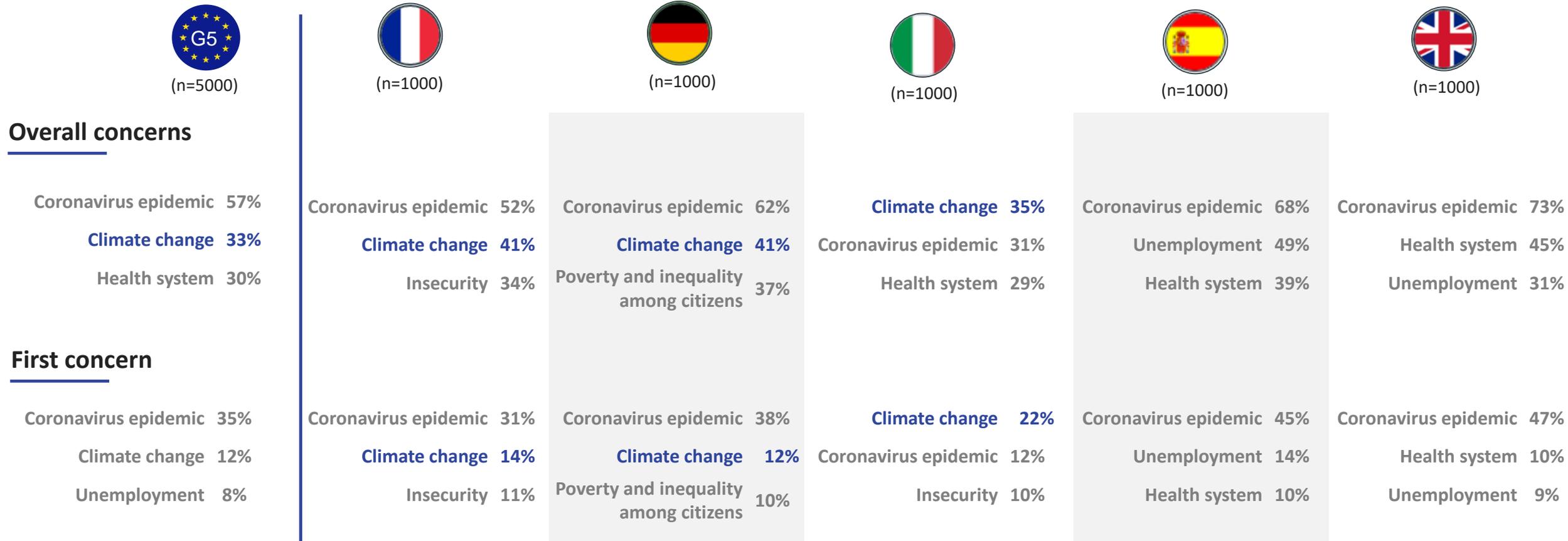
**A period of lockdown which  
made it possible to experience  
concrete improvements in the  
environment.**



Climate change is a major concern for Europeans (33%) behind the coronavirus (57%) but ahead of the health system (30%), unemployment (29%) or poverty and inequality among citizens (28%).



Top 3 of concerns



Q1. Which of the following 3 subjects are you most concerned about right now?

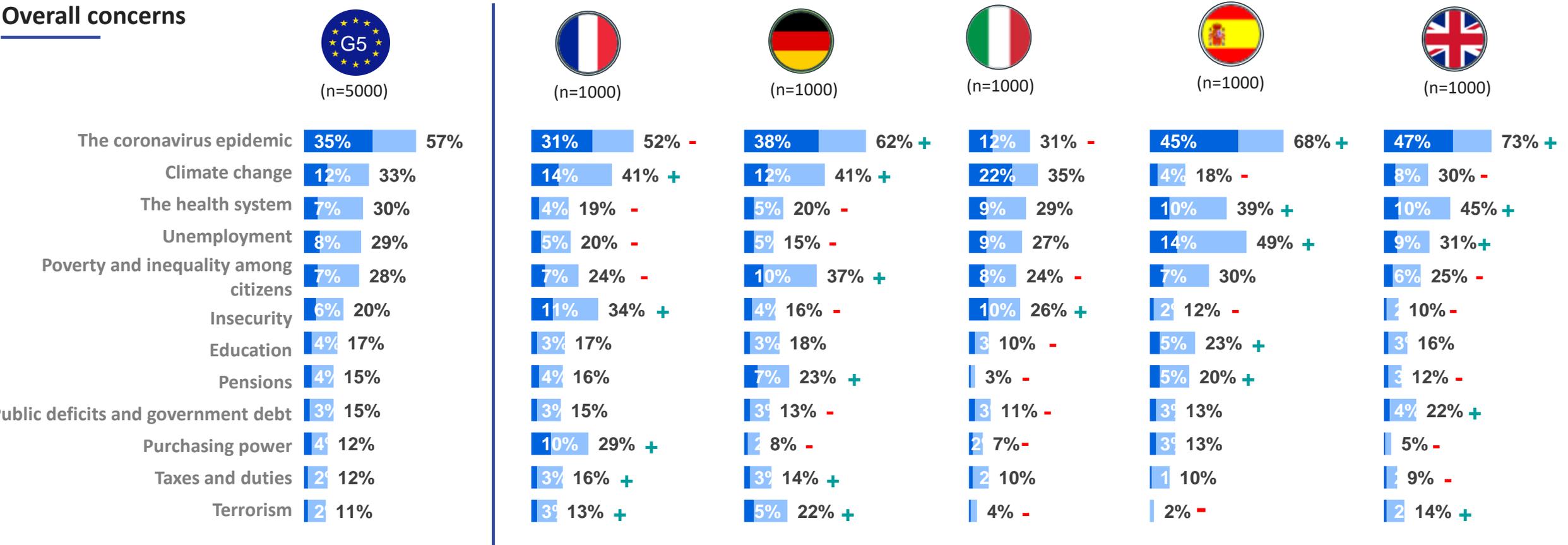
Base: Total sample



The French and the Germans (41% against 33% on average) are particularly affected by climate change, more than Italians (35%) or British (30%). The Spanish are more worried about health issues (Coronavirus or health system) or socio-economic issues (unemployment or pensions) with climate change ranking only in 7th position in their concerns.

Significant differences only on the global answers

Overall concerns



Q1. Which of the following 3 subjects are you most concerned about right now?

Base: Total sample

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■ First answer ■ Other answers XX Global answers

+ / - Significantly above/below 95% of Total G5

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# Europeans have changed their personal attitude to combatting global warning. The Spanish and British make the greatest efforts.



## Personal attitude to combating global warming



(n=5000)



(n=1000)



(n=1000)



(n=1000)



(n=1000)



(n=1000)

**Net Make change 62%**

**57% -**

**56% -**

**51% -**

**68% +**

**76% +**

I have made significant changes to my lifestyle to combat global warming 10%

9%

10%

6% -

11%

14% +

I have changed some of my behaviours to combat global warming 52%

48% -

46% -

45% -

58% +

61% +

I am trying to pay a little attention to my impact on the environment 30%

35% +

30%

43% +

25% -

17% -

I don't do anything in particular 9%

8%

15% +

6% -

7% -

8%

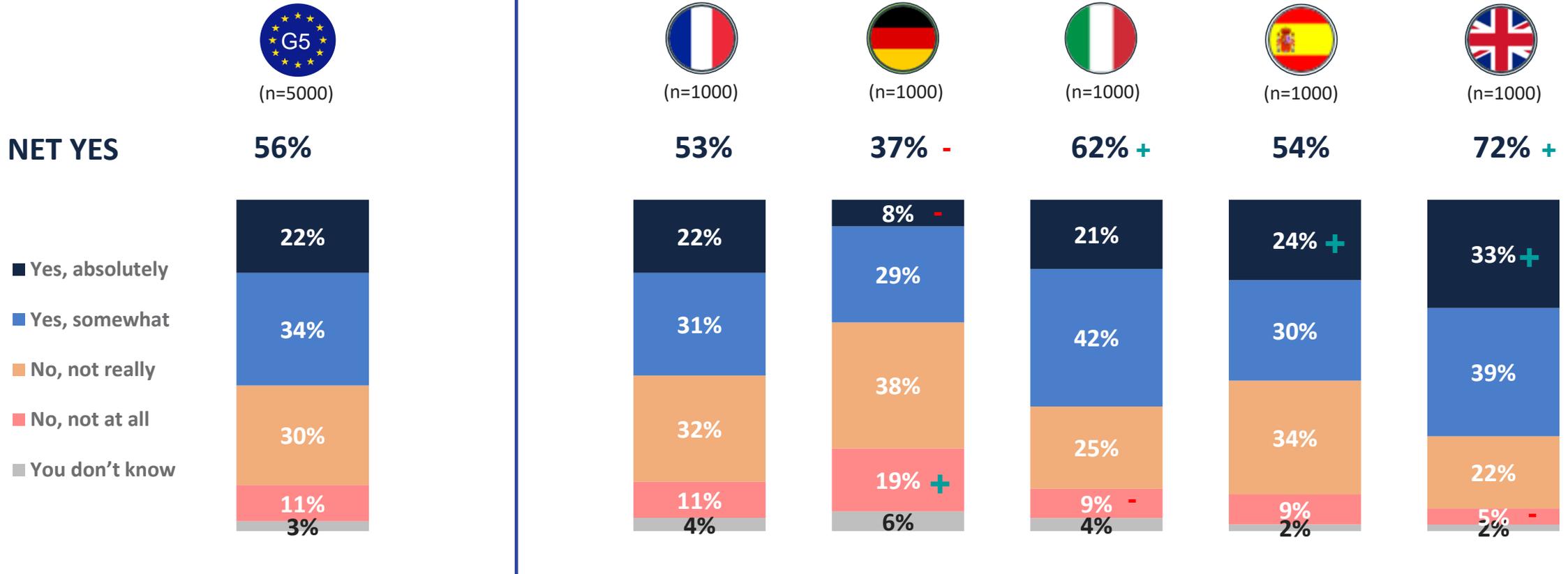
Q4. Which of the following phrases best describes your personal efforts to combat global warming?

Base: Total sample

# The lockdown was convincing: more than half of Europeans noticed improvements in their environment (reduction in pollution, biodiversity, etc.) where they live. A higher percentage for Italians and British.



## Impact of lockdown



Q2. During lockdown did you notice any improvements in your surrounding environment (less pollution, biodiversity, etc.)?

Base: Total sample

# Europeans and climate change?

The development of less polluting modes of transport is identified as one of the main solutions to combat the effects of climate change.

Strong expectations vis-à-vis a whole series of players, governments logically at the top, but at a very similar level, companies and car manufacturers.



# Reducing industrial pollution (63%), developing less polluting modes of transport and reducing waste and packaging (41% in both cases) are the 3 mains solutions adopted by Europeans to combat global warming.

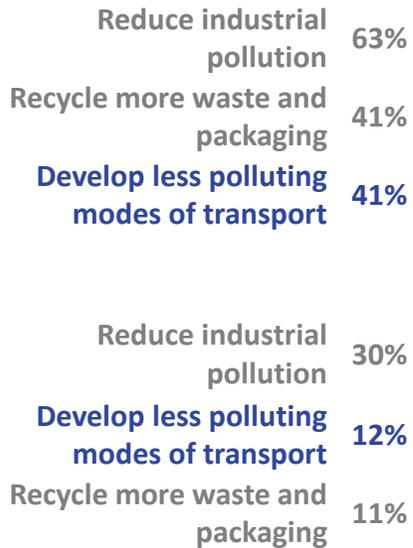


## Top 3 solutions

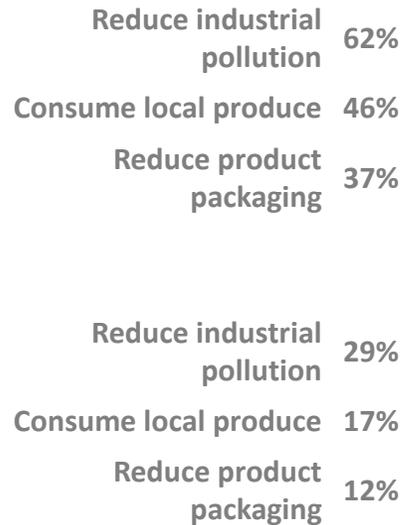


(n=5000)

### Solutions to combat global warming



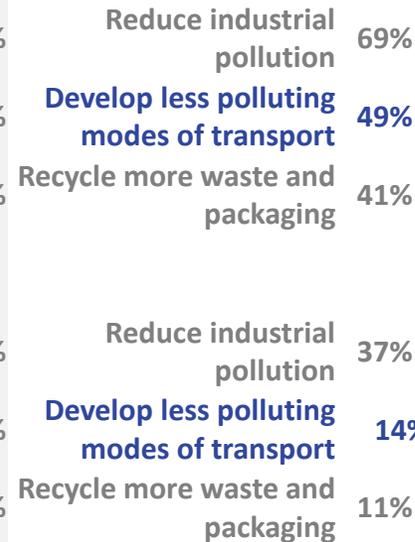
(n=1000)



(n=1000)



(n=1000)



(n=1000)



(n=1000)



Q3. What do you believe should be done as a priority to combat global warming?

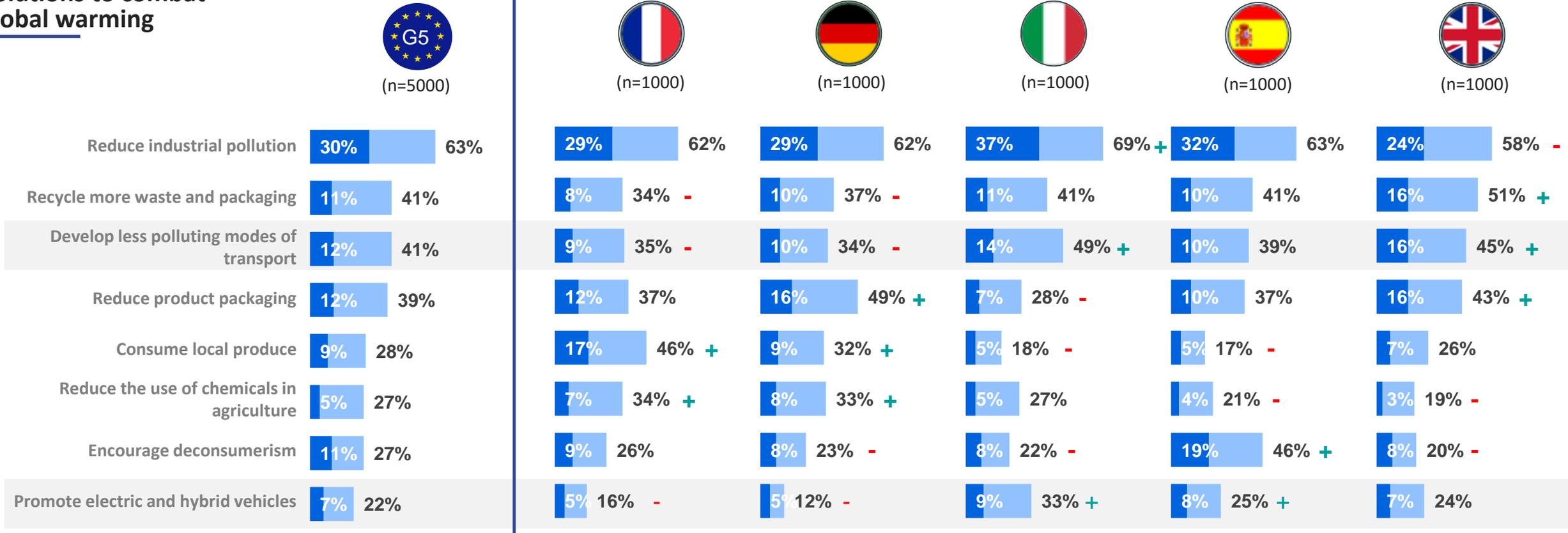
Base: Total sample

# Italians and British are more favourable to the development of less polluting modes of transport and the promotion of electric and hybrid vehicles.



Significant differences only on the global answers

## Solutions to combat global warming



Q3. What do you believe should be done as a priority to combat global warming?

Base: Total sample

13 - © Ipsos

■ First answer ■ Other answers XX Global answers

+ / - Significantly above/below 95% of Total G5

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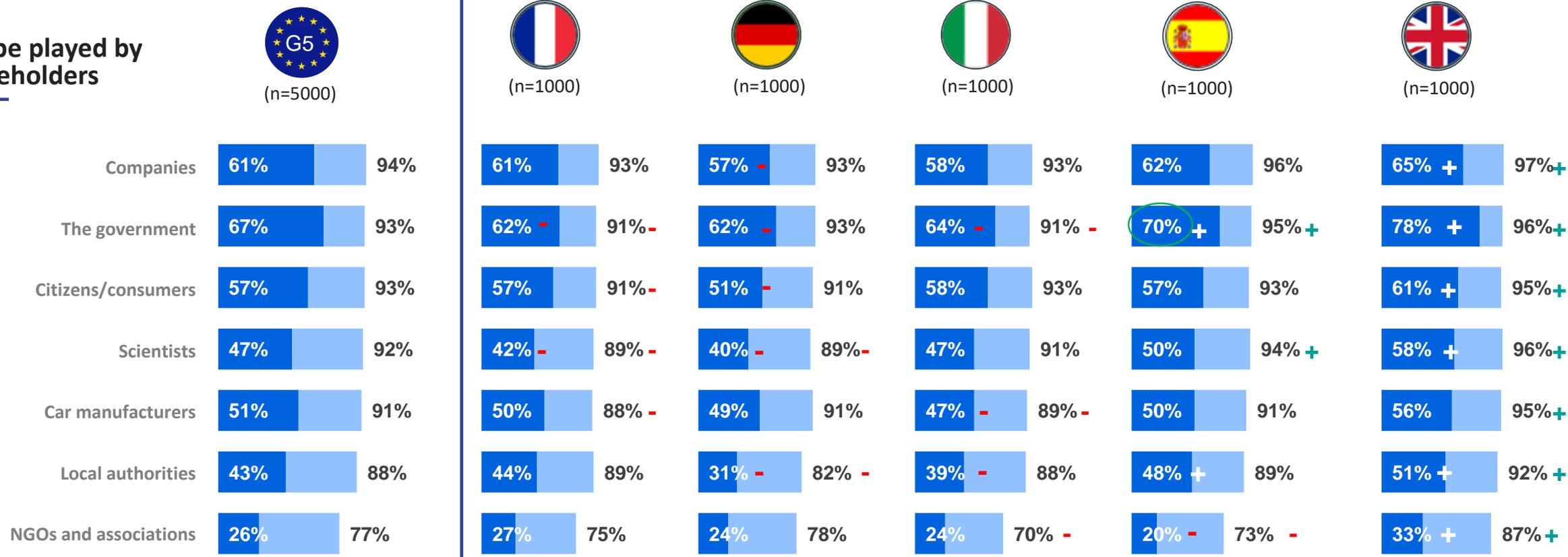


Strong expectations vis-à-vis a whole series of actors, public and private. Governments logically have an important role to play for Europeans (67%) but, at a similar level, high expectations of companies (61%) and car manufacturers (51%).

Citizens themselves do not shirk their responsibility and consider that they have an important role to play (57%).

Significant differences only on the global answers

**Role to be played by the stakeholders**



Q5. In your opinion, do each of the following stakeholders have an important role in combating climate change in your country? A role that is...

Base: Total sample

Very important    Quite important    XX Net important

# ELECTRIC AND HYBRID VEHICLES, WHAT FUTURE

A close-up photograph of a person's hand plugging a white charging cable into the charging port of a teal-colored electric vehicle. The background is a blurred outdoor setting.

?

Mobility will be electric: Europeans want it and anticipate it

2

## **Electric and hybrid vehicles, what future?**

**The generalization of electric and hybrid vehicles, perceived as a profound change, is desired by Europeans.**

**Europeans predict a significant development of this type of vehicle but consider the transition to date a little slow.**



Europeans consider that the generalization of electric and hybrid vehicles marks a new stage in automobile mobility (69%). The Italians (79%), Spanish (74%) and British (78%) are the most convinced.



These same Europeans think that these vehicles have a positive impact on reducing pollution.

### Opinions on electric and hybrid vehicles

	 (n=5000)	 (n=1000)	 (n=1000)	 (n=1000)	 (n=1000)	 (n=1000)
The widespread adoption of electric and hybrid vehicles is a fad	31%	45% +	40% +	21% -	26% -	22% -
It is a major transformation to the way we travel by car	69%	55% -	60% -	79% +	74% +	78% +
The widespread adoption of electric and hybrid vehicles will have a positive effect on reducing pollution	68%	54% -	49% -	80% +	82% +	77% +
The widespread adoption of electric and hybrid vehicles won't really have a positive effect on reducing pollution	32%	46% +	51% +	20% -	18% -	23% -

Q14. Which of the following statements about electric and hybrid vehicles is closest to what you think?

Base: Total sample

The average daily distance travelled by car by Europeans equipped with one is 34 km, and they make an average of 8 trips of 300 km or more per year *(5 times per year on average in Spain, just over 11 times in Germany).*



Q7. How many kilometres do you travel per day in a week on average with the vehicle you personally use the most?  
 Q8. And how many times a year do you travel on journeys over 300 km with the vehicle you personally use the most?  
 Base: Has a car and driver license

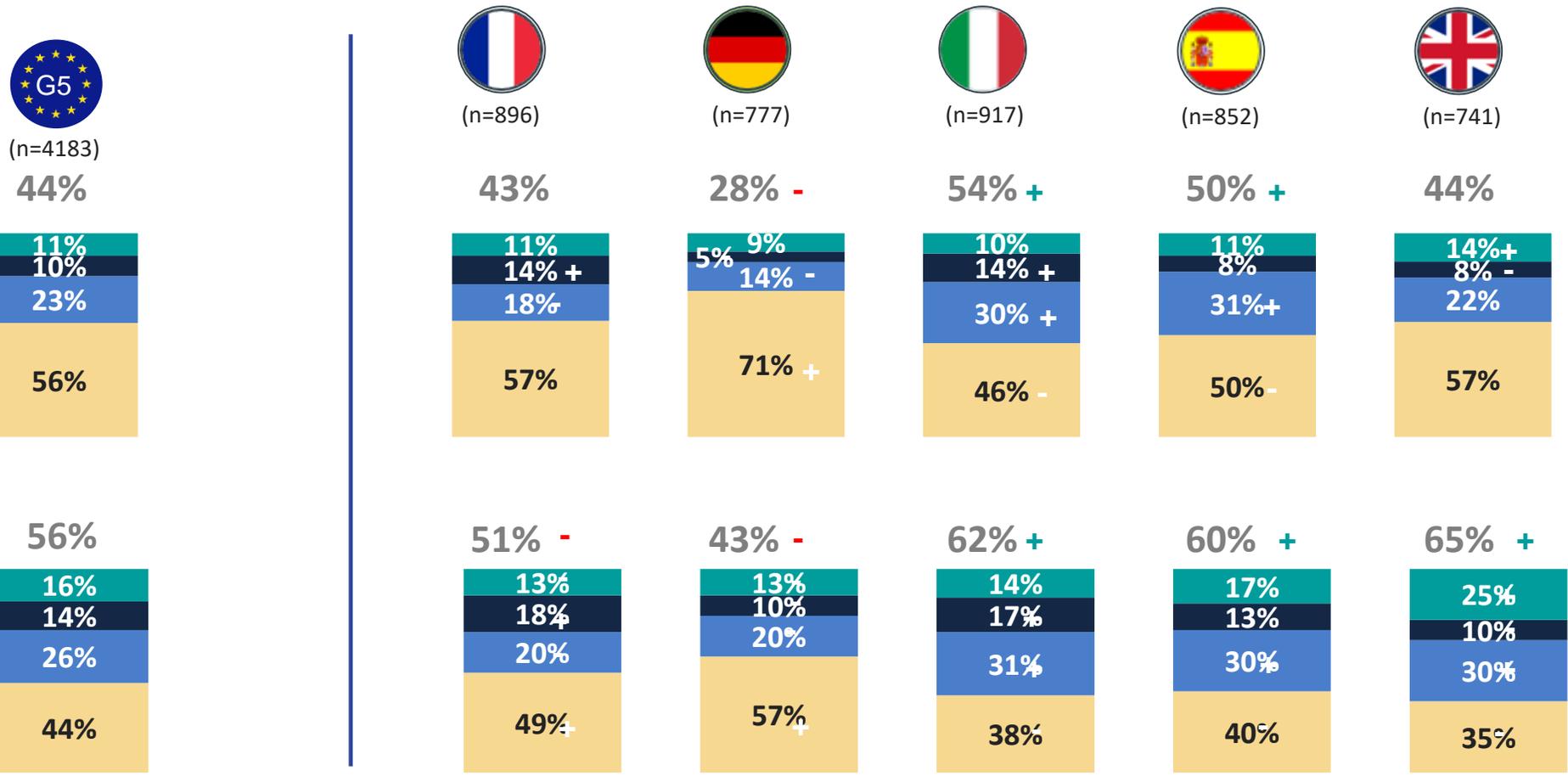
Even so the majority of Europeans who have their driving license think in 2020 that a thermal vehicle with a combustion engine (petrol, diesel) best meets their needs (56% vs 71% for Germany).

44% of Europeans are convinced that an electric or hybrid vehicle would better meet their needs and 56% consider that is the more economic solutions. The French and German are least convinced.

**Best vehicle for the needs**

NET Electric / Hybrid vehicle: 44%

- An electric vehicle
- A plug-in hybrid vehicle
- A self-charging hybrid vehicle
- A combustion-engine vehicle (petrol, diesel)



Q9. Given how you use your vehicle, which type of vehicle do you think best corresponds to your needs? Base: Has a car and driver license  
 Q10. And given how you use your vehicle, which type of vehicle do you believe offers the most beneficial solution from an economic perspective? Base: Has a car and driver license

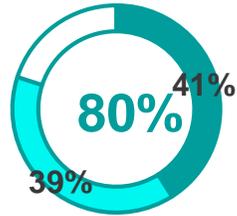
# 8 out of 10 Europeans want electric and hybrid vehicles to develop massively over the next 10 years (with 41% "absolutely"). The Germans and French are less enthusiastic than other Europeans.



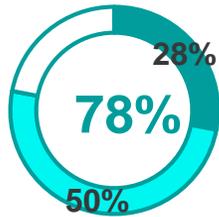
## Desire for growth in electric and hybrid vehicles in the next 10 years



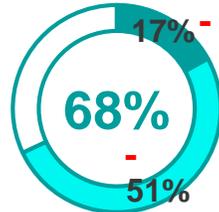
(n=5000)



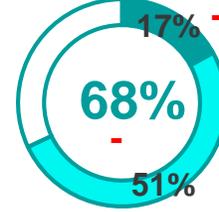
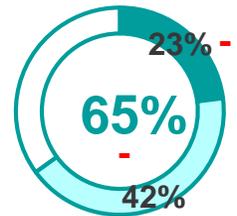
## Prediction about the growth in electric and hybrid vehicles in the next 10 years



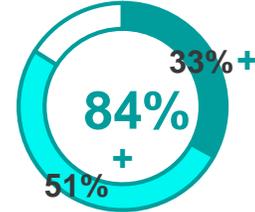
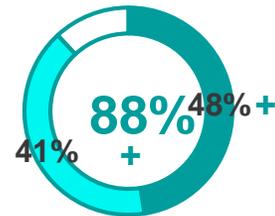
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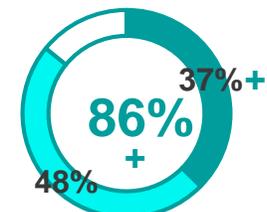
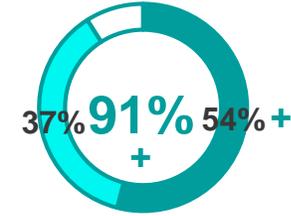
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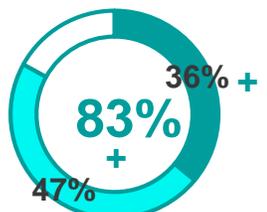
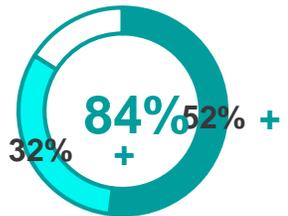
(n=1000)



(n=1000)



(n=1000)



■ Yes, absolutely

■ Yes, somewhat

Q15. In the next 10 years, would you like to see a dramatic growth in electric and hybrid vehicles?  
Q16. And do you think the next 10 years will see a dramatic growth in electric and hybrid vehicles?

Base: Total sample

20 - © Ipsos

+ / - Significantly above/below 95% of Total G5

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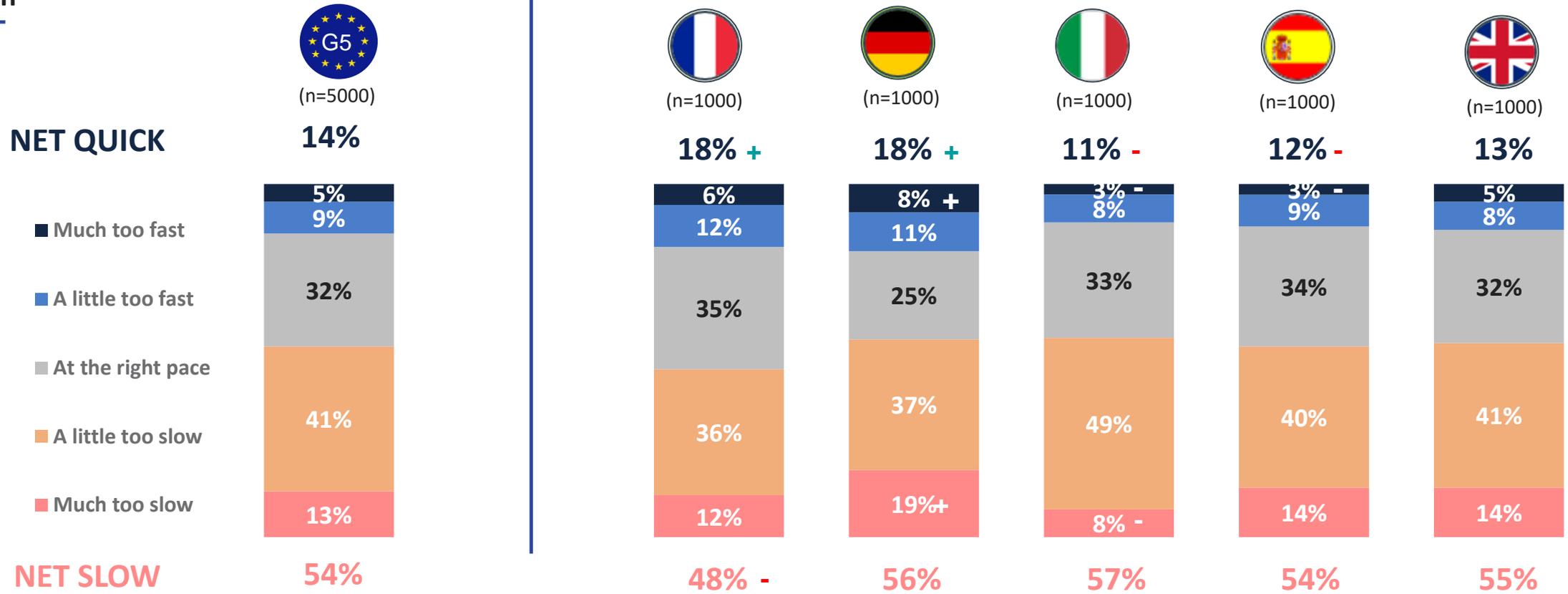


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# 54% of Europeans believe this transition is currently too slow.



## Rate of the transition



Q17. And at present, do you think the growth in electric and hybrid vehicles is...?

Base: Total sample

21 - © Ipsos

+ / - Significantly above/below 95% of Total G5

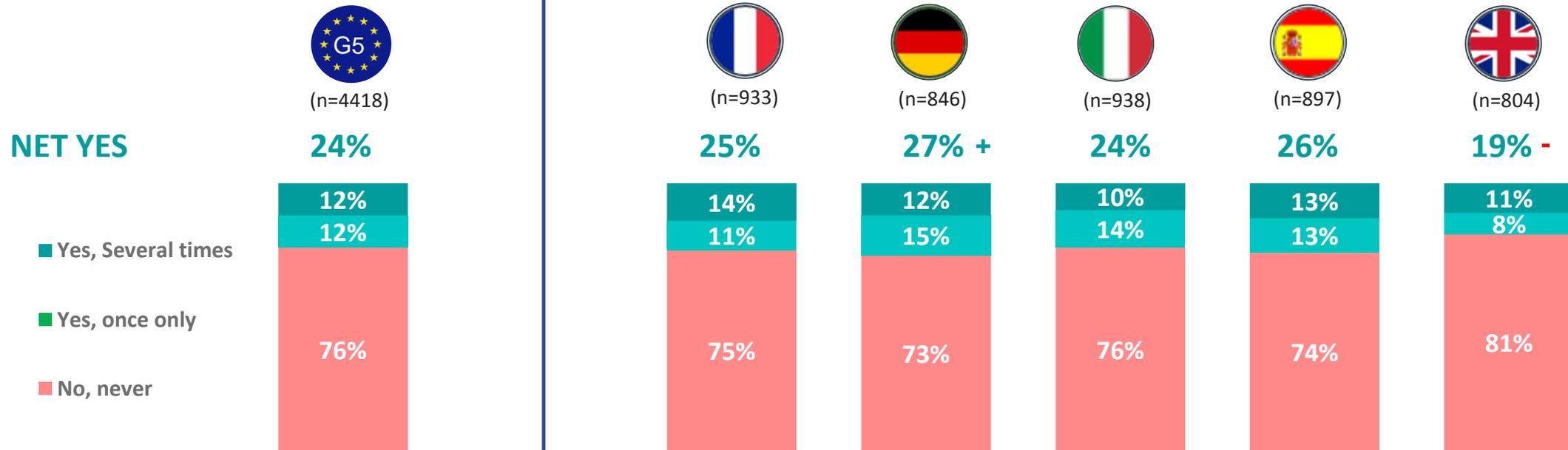
# **Electric and hybrid vehicles, what prospects for the future?**

**Some Europeans plan to acquire an electric or hybrid vehicle in the short or medium term for reasons that combine their aspirations to contribute to climate change and their desire to reduce their car-related budget.**



# Only a quarter of Europeans have driven an electric or hybrid vehicle *(12% only once)*.

## Experience of electric and hybrid vehicles



Q21. Have you already driven an electric or hybrid vehicle?

Base: Has a driver license

23 – © Ipsos

+ / - Significantly above/below 95% of Total G5

# Driving an electric vehicle is more pleasant than driving a conventional vehicle (76% of electric vehicle drivers).



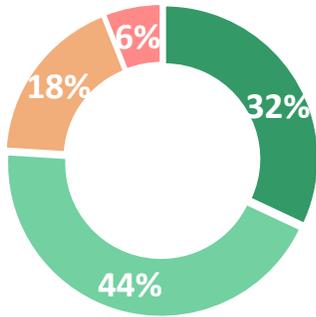
## Pleasure of driving an electric vehicle



(n=1076)

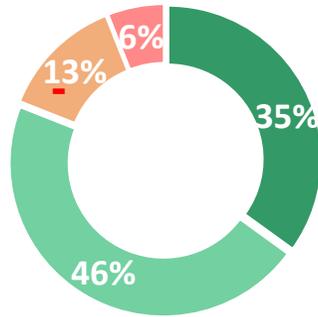
**NET Pleasant 76%**

- Much nicer than driving a conventional vehicle
- A little nicer than driving a conventional vehicle
- A little less pleasant than driving a conventional vehicle
- Much less pleasant than driving a conventional vehicle



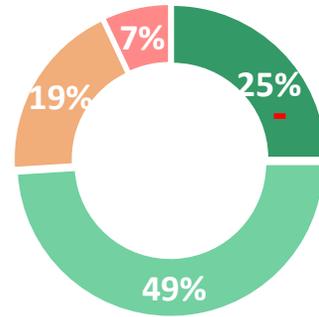
(n=233)

**81% +**



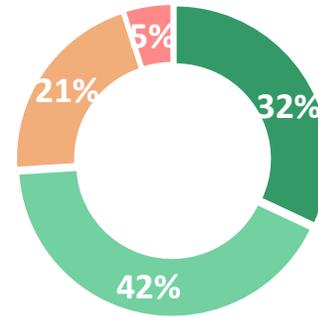
(n=232)

**74%**



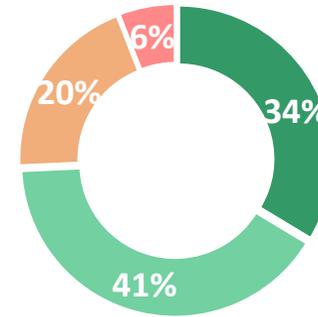
(n=222)

**74%**



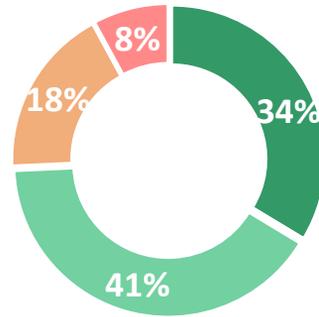
(n=235)

**75%**



(n=154)

**75%**



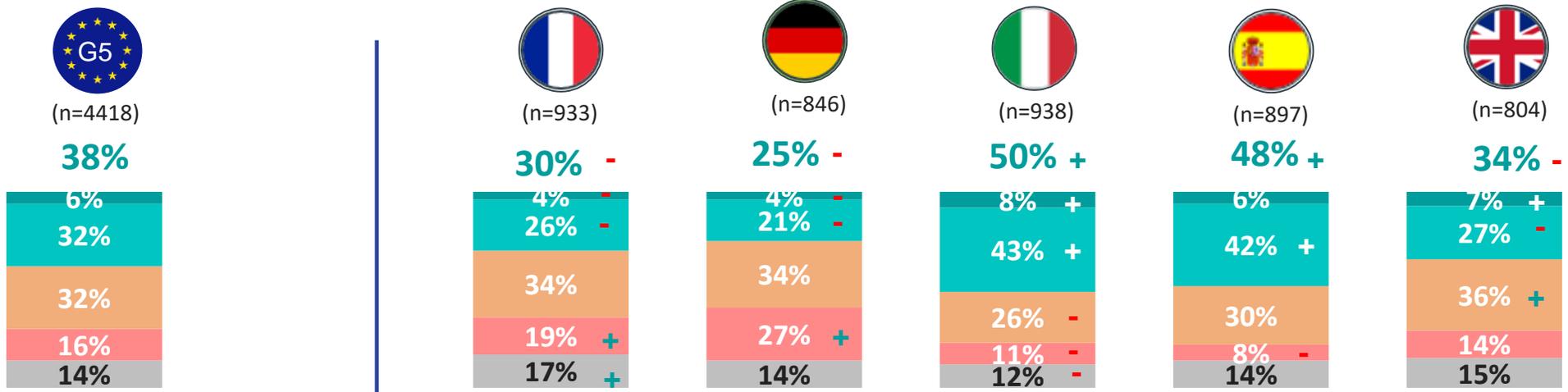
Q24. And do you find driving an electric vehicle...?  
Base: Has ever driven an electric car

Short and medium term projections show a high level of appetite for electric vehicles. More than a third of Europeans think that their next vehicle could be an electric vehicle. These intentions are higher in the long term (55% of Europeans). The Italians and Spanish are the most motivated.

### Short-term projection electric vehicle

#### Net Possible

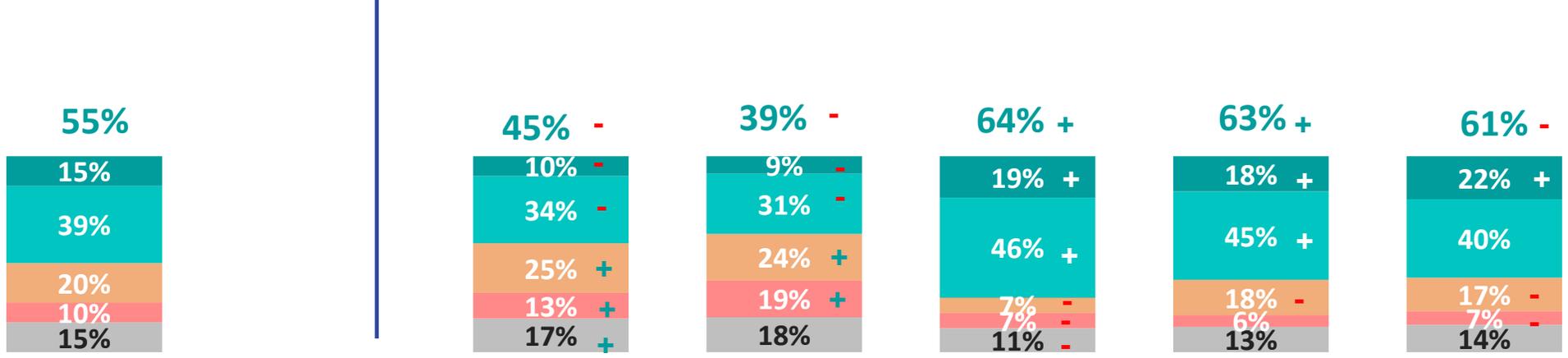
- Definitely
- Probably
- Unlikely
- Definitely not
- You don't know



### Long-term projection electric vehicle

#### Net Possible

- Definitely
- Probably
- Unlikely
- Definitely not
- You don't know



Q25. How likely do you think your next car could be an electric car?  
 Q26. And how likely do you think your car could be an electric car in the next 10 years?

Base: Has a driver license

+ / - Significantly above/below 95% of Total G5

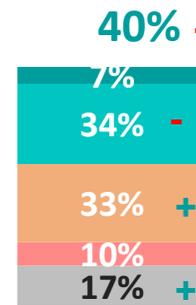
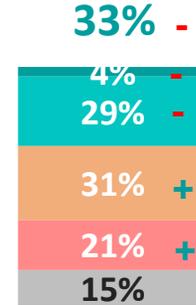
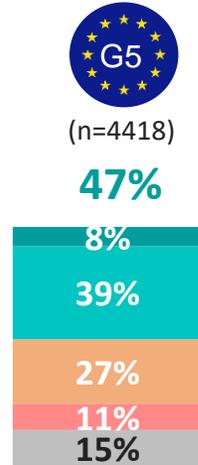
# Concerning hybrid vehicles, short-term intentions are even stronger though equivalent to electric in the long term. 47% of Europeans think their next car could be a hybrid car (and 52% in the next 10 years).



## Short-term projection hybrid vehicle

### Net Possible

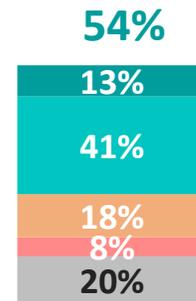
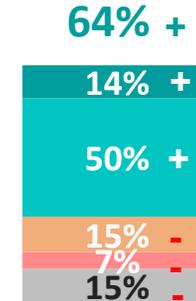
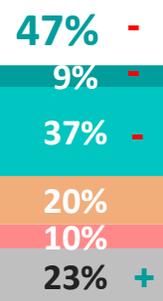
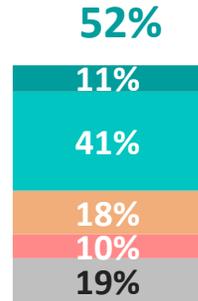
- Definitely
- Probably
- Unlikely
- Definitely not
- You don't know



## Long-term projection hybrid vehicle

### Net Possible

- Definitely
- Probably
- Unlikely
- Definitely not
- You don't know



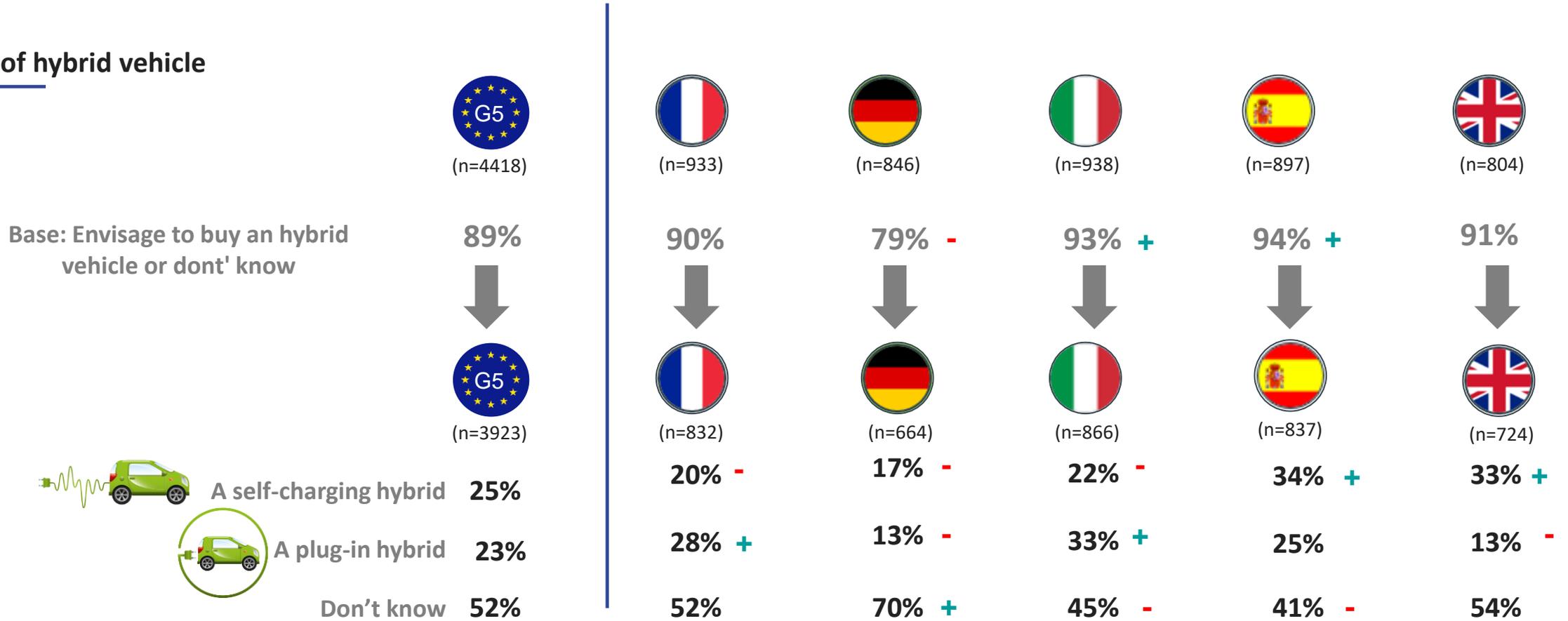
Q27. How likely do you think your next car could be a hybrid car?

Q29. And how likely do you think your car could be a hybrid or plug-in hybrid car in the next 10 years?

Base: Has a driver license

# Half of future hybrid vehicle buyers don't know what type of hybrid vehicle they are buying.

## Type of hybrid vehicle



Q27. How likely do you think your next car could be a hybrid car? *Base: Has a driver license*  
 Q28. And do you mostly plan to buy...? *Base: Envisage to buy an hybrid vehicle or dont' know*

The major motivations to buy an electric or hybrid vehicle are linked to reducing the cost (fuel or purchasing price – more important in the UK) or producing less pollution (more important in Spain and less in France and Germany).



**Motivations for purchasing an electric or hybrid vehicle**

**Top 3**



(n=4075)

- Producing less pollution / gas emissions 44%
- Reducing my fuel costs 43%
- Less expensive to buy 38%



(n=856)

- Reducing my fuel costs 45%
- Producing less pollution / gas emissions 40% -
- Less expensive to buy 38%



(n=716)

- Less expensive to buy 38%
- Producing less pollution / gas emissions 34% -
- Benefiting from tax advantages or grants when buying 28%



(n=887)

- Producing less pollution / gas emissions 46%
- Reducing my fuel costs 43%
- Less expensive to buy 39%



(n=863)

- Producing less pollution / gas emissions 56% +
- Reducing my fuel costs 52% +
- Less expensive to maintain 27%



(n=753)

- Less expensive to buy 51% +
- Reducing my fuel costs 48% +
- Producing less pollution / gas emissions 41%

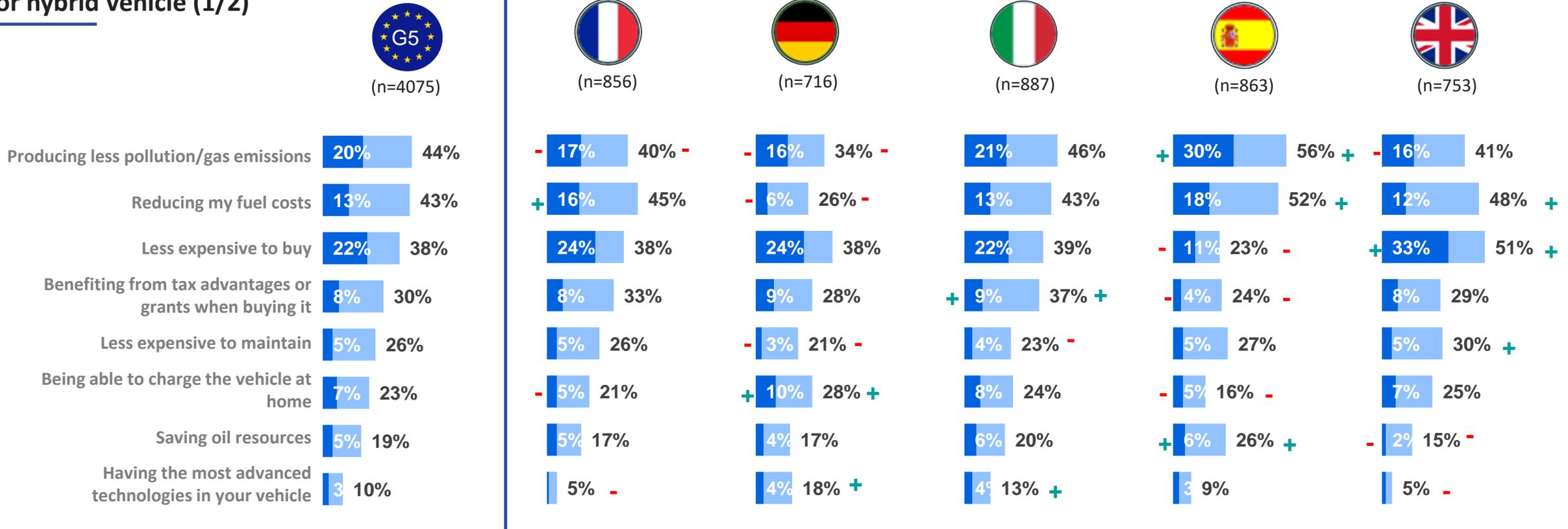
Q31. Which of the following aspects would motivate or encourage you to buy an electric or hybrid vehicle? Base: Envisage to buy an electric or hybrid vehicle or dont' know

Q32. Which of the following aspects put you off buying an electric or hybrid vehicle? Base: Has a driver license

The main motivations for purchasing an electric vehicle are the reduction of pollution (44% of Europeans), fuel costs (43%) or price (38%). Then come other financial reasons.



### Motivations for purchasing an electric or hybrid vehicle (1/2)

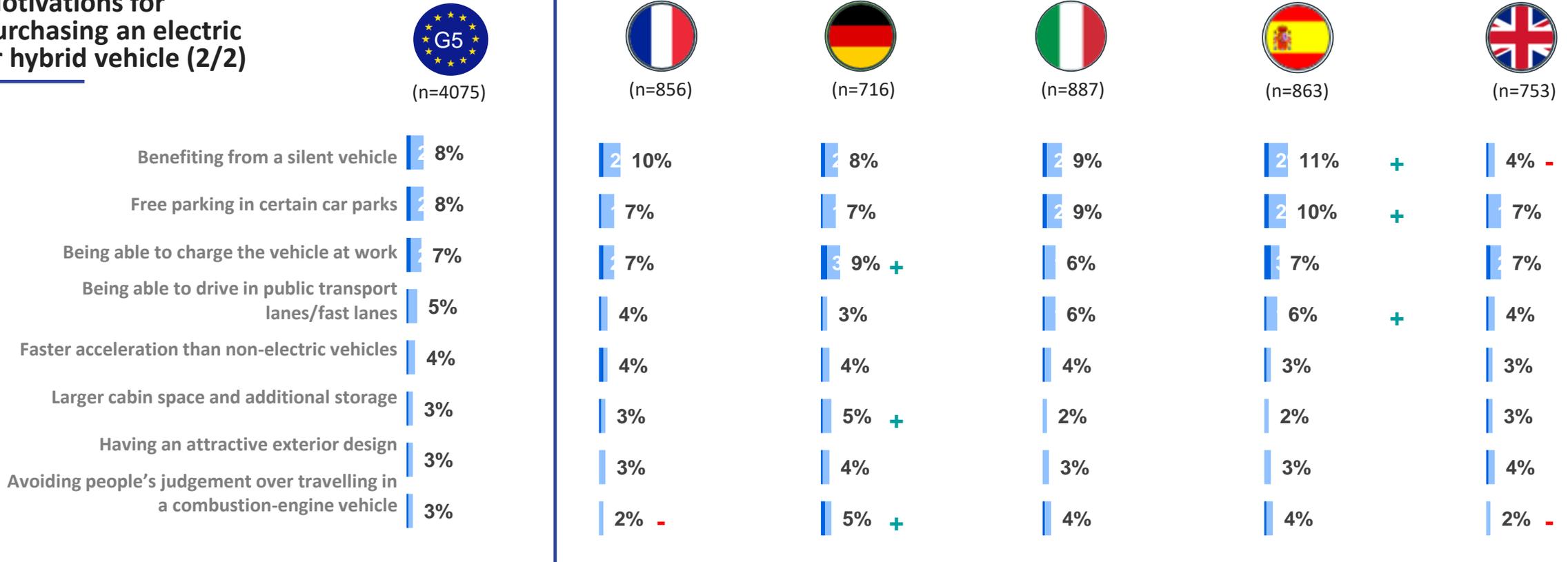


Q31. Which of the following aspects would motivate or encourage you to buy an electric or hybrid vehicle?  
 Base: Envisage to buy an electric or hybrid vehicle or dont' know

■ First answer ■ Other answers XX Global answers

# The specific technical characteristics of electric and hybrid vehicles ("benefit from a quiet vehicle", "have the most advanced technologies in your vehicle", "larger passenger compartment space and additional storage", "have an attractive exterior) are not yet well known to car drivers and, to date, a weak incentive to purchase this type of model

## Motivations for purchasing an electric or hybrid vehicle (2/2)



Q31. Which of the following aspects would motivate or encourage you to buy an electric or hybrid vehicle?

Base: Envisage to buy an electric or hybrid vehicle or dont' know

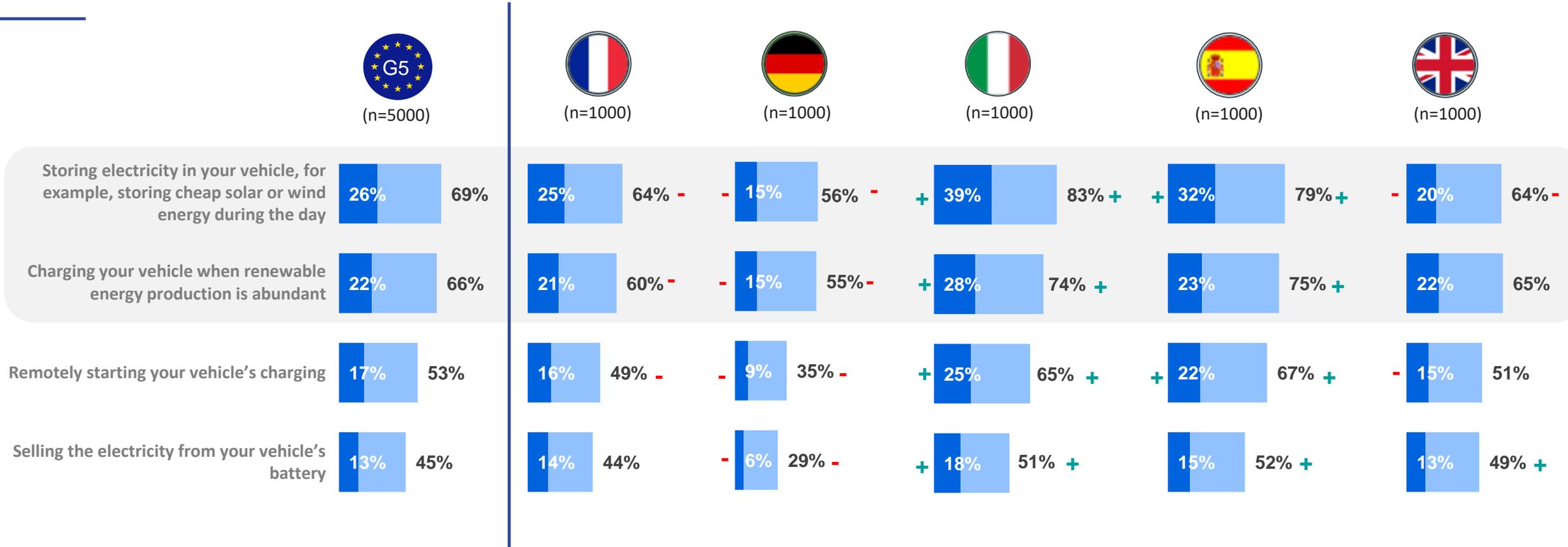
■ First answer ■ Other answers XX Global answers

+ / - Significantly above/below 95% of Total G5

# Storing electricity in the vehicle and charging when renewable energy is abundant are considered to be the most interesting aspects of electrified vehicles.



## Purchase incentive criteria



Q33. If each of the following proposals were possible, would it encourage you to buy a plug-in electric or hybrid vehicle?  
 Base: Total sample

+ / - Significantly above/below 95% of Total G5

Yes a lot (dark blue), Yes a little (light blue), XX Net Yes (grey)



# The Top 3 of barriers to buy an electric or hybrid vehicle concern the vehicle recharging and the costs.



## Barriers to purchasing an electric or hybrid vehicle

Top 3



(n=5000)

- The battery life does not allow long distance travel 38%
- The public charging points are not easy to find 35%
- High total cost of the vehicle's use 30%



(n=1000)

- The battery life does not allow long distance travel 40%
- The attractive models are too expensive 33% +
- Uncertainty over the battery life and when to replace the battery 32% +
- Cost of buying the battery 32% +



(n=1000)

- The battery life does not allow long distance travel 43% +
- The attractive models are too expensive 36% +
- The public charging points are not easy to find 27% -



(n=1000)

- The public charging points are not easy to find 43% +
- High total cost of the vehicle's use 39% +
- The battery life does not allow long distance travel 32% -



(n=1000)

- The public charging points are not easy to find 41% +
- The battery life does not allow long distance travel 40%
- Uncertainty over the battery life and when to replace the battery 29%



(n=1000)

- The battery life does not allow long distance travel 38%
- The public charging points are not easy to find 38% +
- High total cost of the vehicle's use 31%

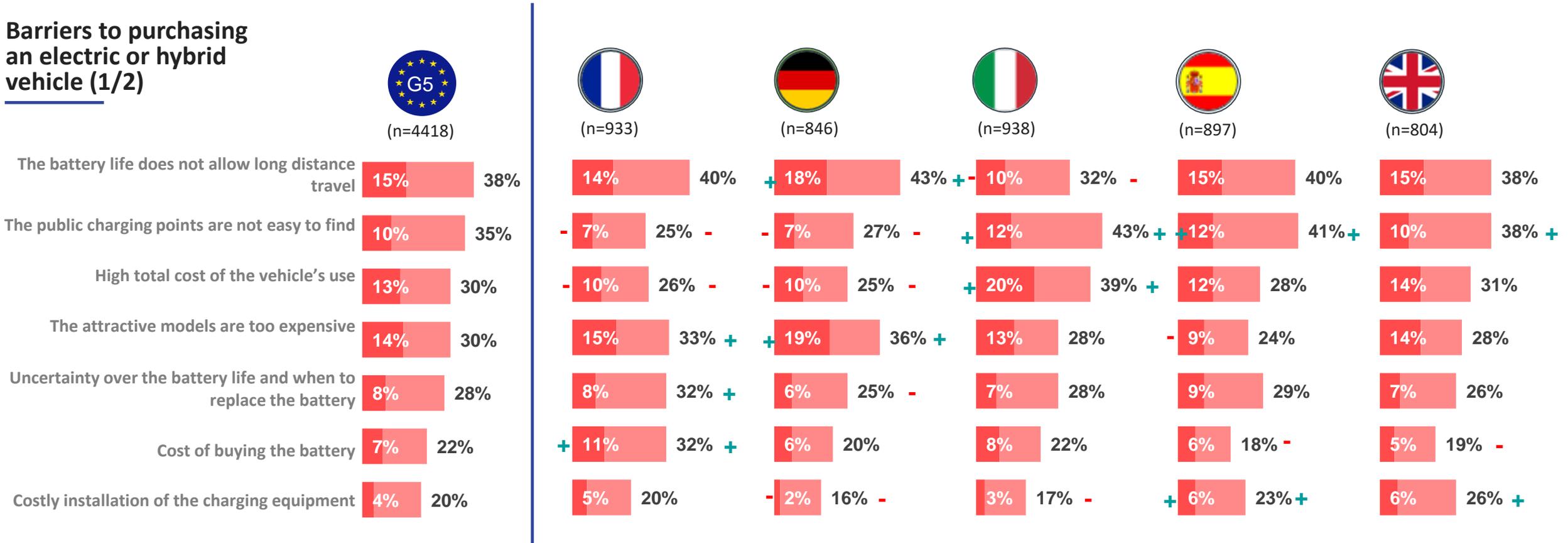
Q31. Which of the following aspects would motivate or encourage you to buy an electric or hybrid vehicle? Base: Envisage to buy an electric or hybrid vehicle or dont' know

Q32. Which of the following aspects put you off buying an electric or hybrid vehicle? Base: Has a driver license

The issue of autonomy of electric or hybrid vehicles and the difficulty to find the public charging stations are mentioned as the main barriers to buy these vehicles.

The budget for the acquisition and maintenance of the vehicle and its equipment is also problematic.

### Barriers to purchasing an electric or hybrid vehicle (1/2)



Q32. Which of the following aspects put you off buying an electric or hybrid vehicle?

Base: Has a driver license

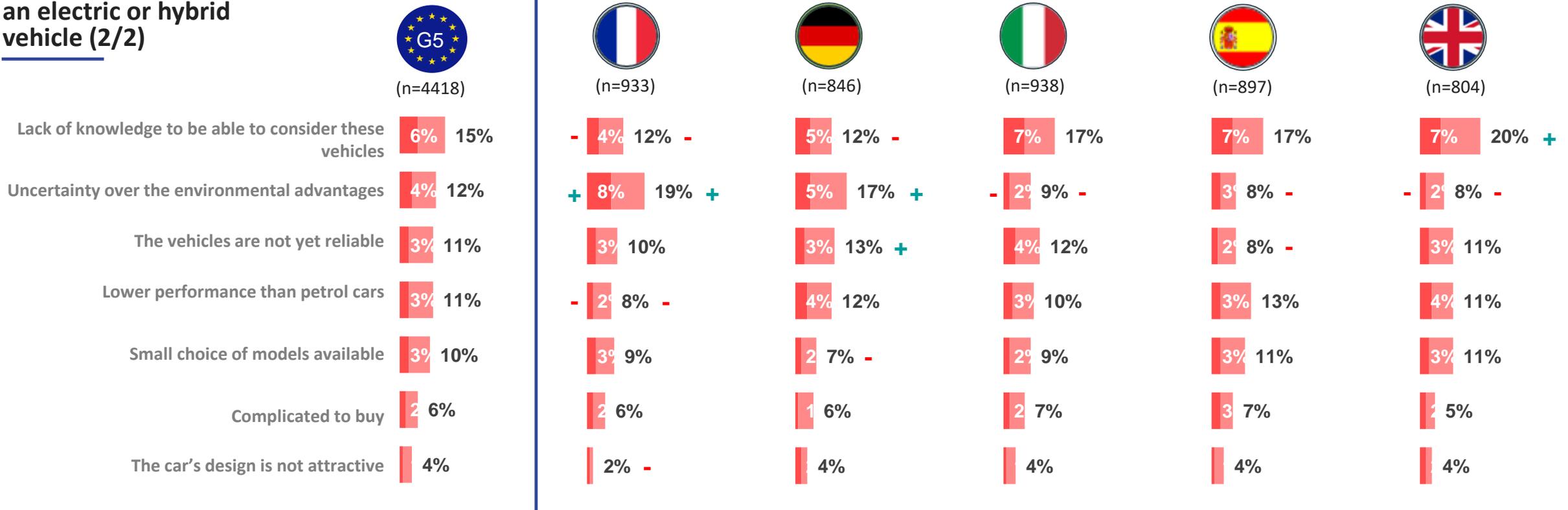
33 - © Ipsos

■ First answer ■ Other answers XX Global answers

+ / - Significantly above/below 95% of Total G5

**Doubts about the real environmental benefits are most prevalent in France and Germany.**  
**Other barriers: lack of reliability of these vehicles, performance inferior to those of combustion vehicle, and lack of knowledge of the characteristics of these vehicles.**

**Barriers to purchasing an electric or hybrid vehicle (2/2)**



Q32. Which of the following aspects put you off buying an electric or hybrid vehicle?  
 Base: Has a driver license

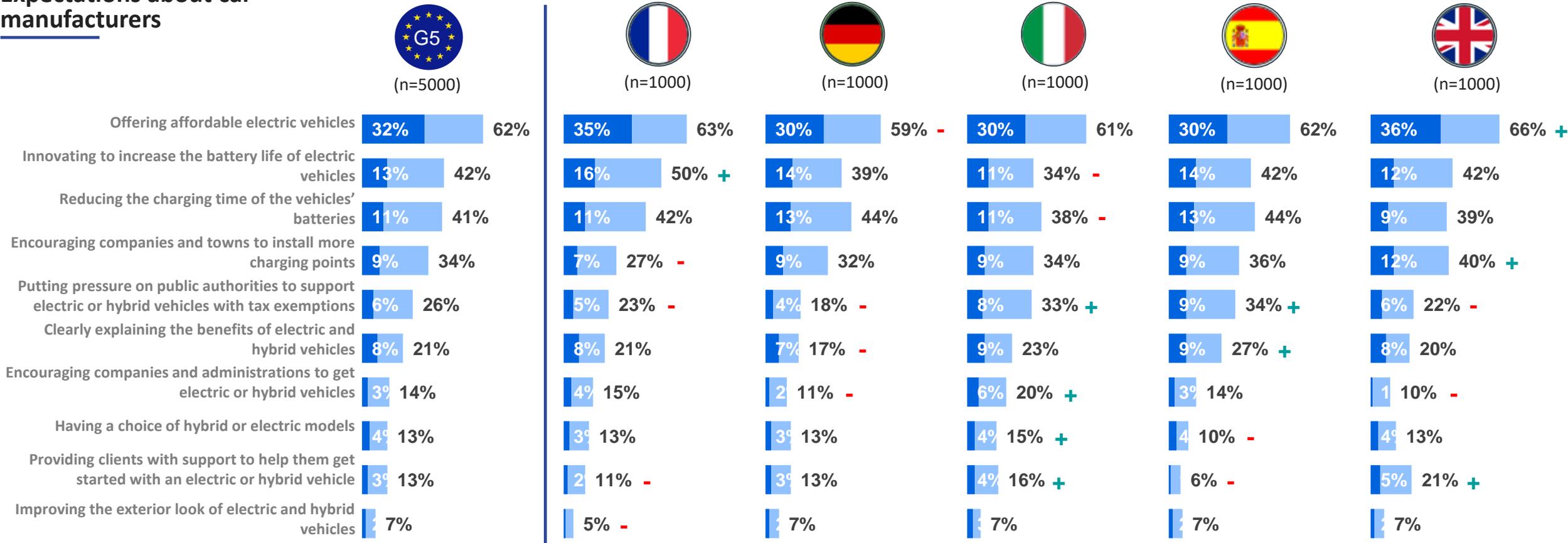
+ / - Significantly above/below 95% of Total G5

■ First answer ■ Other answers XX Global answers

Expectations of car manufacturers concern mainly the ability to offer financially accessible vehicles (62%) and innovation (42%).

Europeans also want car manufacturers to clearly explain the advantages of electric or hybrid vehicles (21%) or to support buyers in getting started (21%) or to support buyers in getting started.

### Expectations about car manufacturers



Q34. In your opinion, which areas should car manufacturers mainly be focusing their efforts on?

Base: Total sample

35 - © Ipsos

■ First answer ■ Other answers XX Global answers

+ / - Significantly above/below 95% of Total G5

## **Electric and hybrid vehicles, what level of information?**

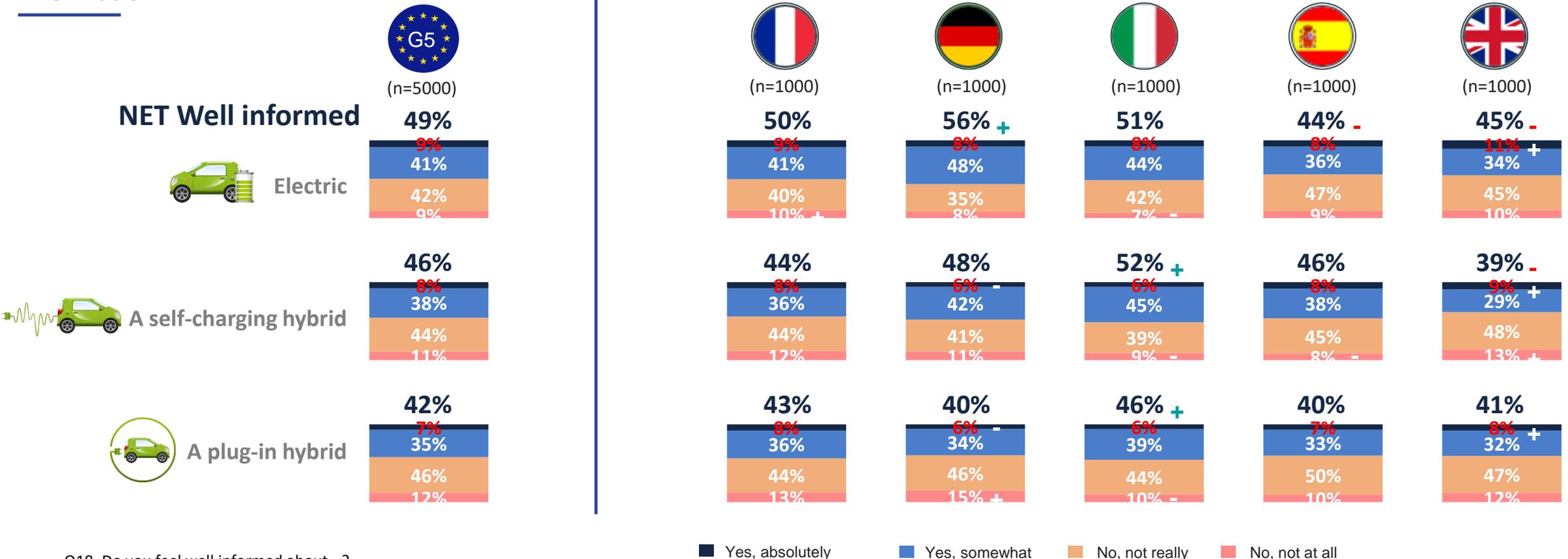
**The lack of knowledge about these vehicles is a reality that clearly requires significant information and educational efforts to inform the market and convert wishes and intentions into behaviour.**



Europeans are aware of their low level of information on electric vehicles (49% of them say they are well informed but only 9% say they are very well informed – the Spanish and British are less well informed).

The percentage is lower for a self-charging hybrid (46% well informed / 8% very well informed) or a plug-in hybrid (42% well informed / 7% very well informed).

### Overall level of information



Q18. Do you feel well informed about...?

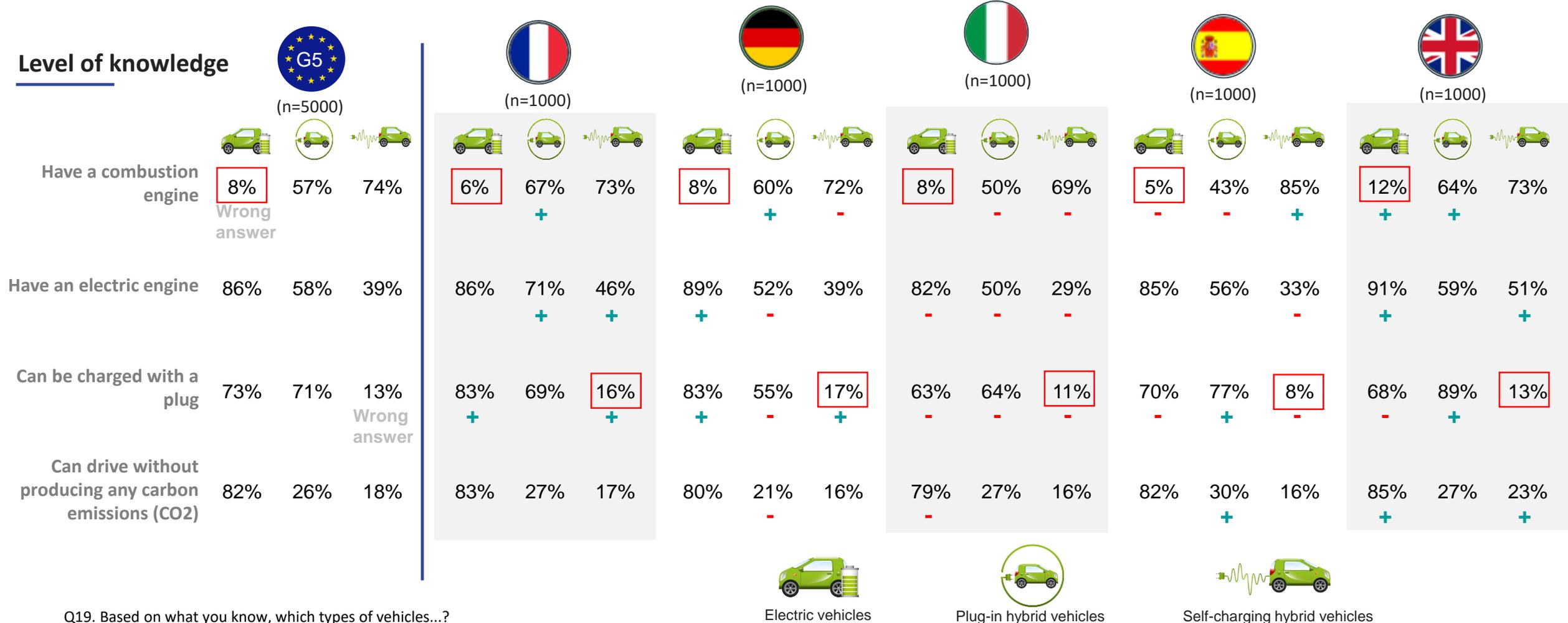
Base: Total sample

37 – © Ipsos

■ Yes, absolutely   ■ Yes, somewhat   ■ No, not really   ■ No, not at all

+ / - Significantly above/below 95% of Total G5

A knowledge check that makes it possible to verify the extent to which a lack of knowledge still largely dominates concerning the equipment, operation and advantages of electric and hybrid vehicles: 57% plug-in hybrid vehicles have a combustion engine, 26% plug-in hybrid vehicles can drive without any carbon (CO2) emissions or 18% self-charging hybrid vehicle.



Q19. Based on what you know, which types of vehicles...?

Base: Total sample

38 - © Ipsos

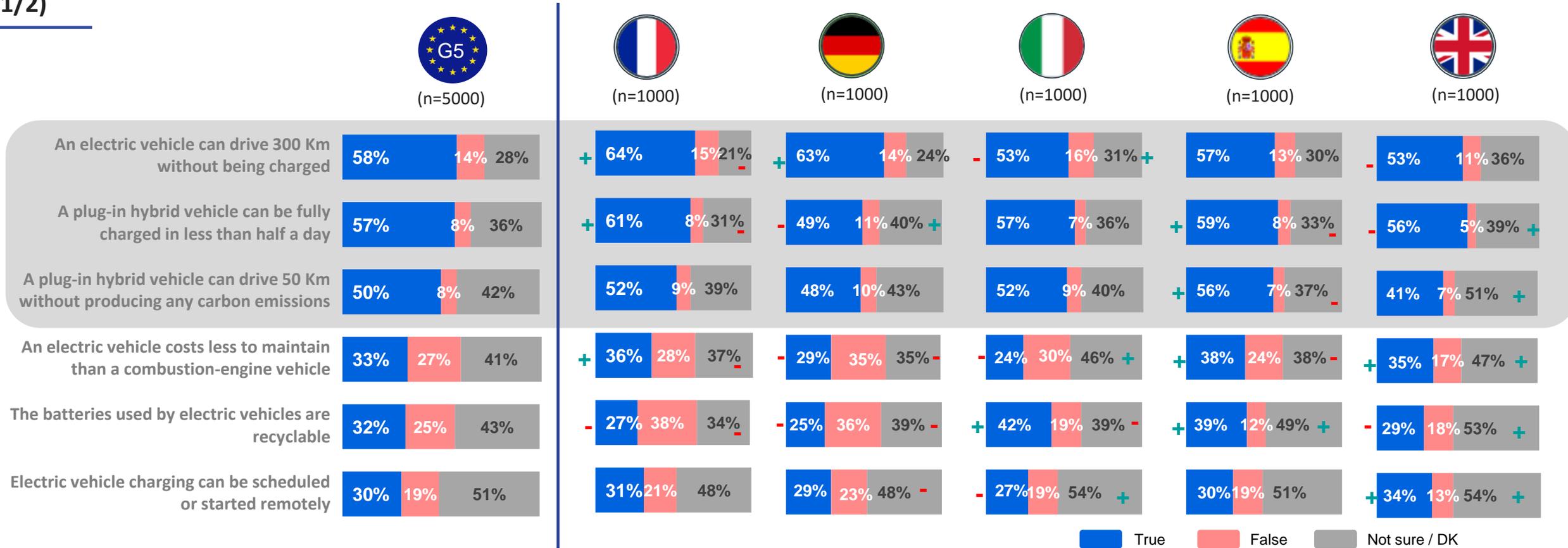
+ / - Significantly above/below 95% of Total G5

# In many ways, Europeans do not know whether the following statements are true or false and clearly indicate "they really don't know".



## Top 3

### Level of knowledge (1/2)



Q20. Based on what you know, are each of the following statements about electric and hybrid vehicles TRUE or FALSE? You can also say if you don't know or are not sure about your answer?

Base: Total sample

Over half of respondents know that an electric vehicle can drive 300 Km without being charged, that plug-in hybrids can be charged in less than half a day and that a plug-in hybrid can drive 50 Km without producing any carbon emissions.

**Level of knowledge**  
(Highest % of true answers)



(n=5000)



(n=1000)



(n=1000)



(n=1000)



(n=1000)



(n=1000)

Statement	G5 (n=5000)	France (n=1000)	Germany (n=1000)	Italy (n=1000)	Spain (n=1000)	UK (n=1000)
An electric vehicle can drive 300 Km without being charged	58%	64% +	63% +	53% -	57%	53% -
A plug-in hybrid vehicle can be fully charged in less than half a day	57%	61% +	49% -	57%	59% +	56% -
A plug-in hybrid vehicle can drive 50 Km without producing any carbon emissions	50%	52%	48%	52%	56% +	41%

Q20. Based on what you know, are each of the following statements about electric and hybrid vehicles TRUE or FALSE? You can also say if you don't know or are not sure about your answer?

Base: Total sample

40 - © Ipsos

+ / - Significantly above/below 95% of Total G5

# Many Europeans are unaware that the electricity of battery can be sold, the electric vehicle has better acceleration power or that a standard household socket can be used to charge an electric vehicle.



## Level of knowledge (Highest % of wrong answers)



(n=5000)



(n=1000)



(n=1000)



(n=1000)



(n=1000)



(n=1000)

Statement	G5 (n=5000)	France (n=1000)	Germany (n=1000)	Italy (n=1000)	Spain (n=1000)	UK (n=1000)
The electricity from your vehicle's battery can be sold	46%	48%	49% +	47%	47%	42% -
A standard household socket can be used to charge an electric vehicle	42%	37% -	47% +	40%	50%	42%
An electric vehicle has higher acceleration power than a combustion-engine vehicle (petrol, diesel)	40%	36% -	40%	40%	45%	38%
A standard household socket can be used to charge an electric vehicle	33% -	45%	45%	33%	45%	33%

Q20. Based on what you know, are each of the following statements about electric and hybrid vehicles TRUE or FALSE? You can also say if you don't know or are not sure about your answer?

Base: Total sample

41 - © Ipsos

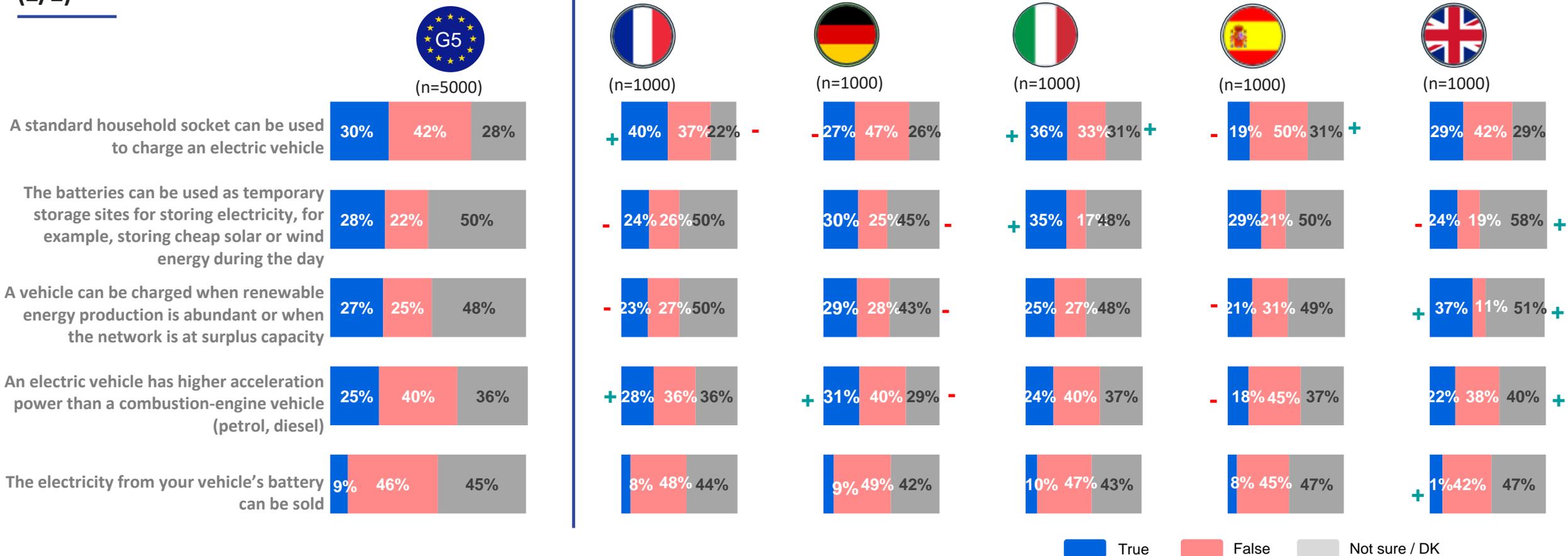
+ / - Significantly above/below 95% of Total G5

# The level of incorrect answers (all statements are true) is common to all countries.



## Top 3

### Level of knowledge (2/2)

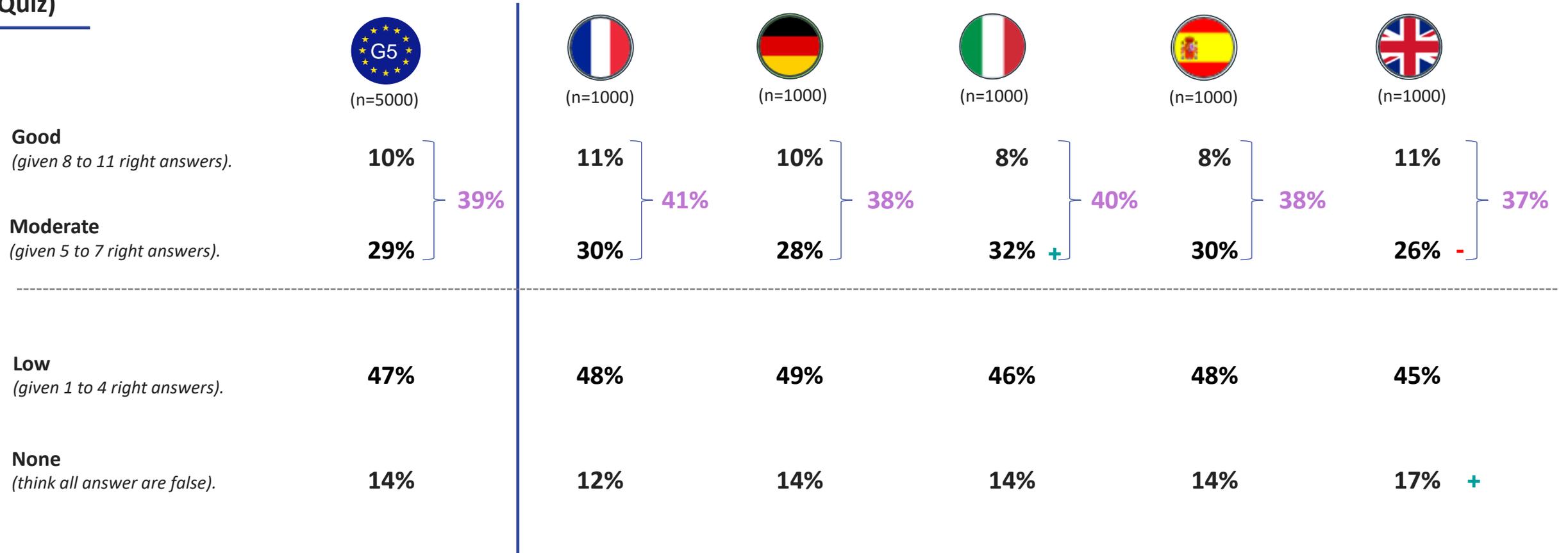


Q20. Based on what you know, are each of the following statements about electric and hybrid vehicles TRUE or FALSE? You can also say if you don't know or are not sure about your answer?

# One out of 10 Europeans have a good awareness of the characteristics of electric or hybrid vehicles.



## Level of knowledge (Quiz)



Q20. Based on what you know, are each of the following statements about electric and hybrid vehicles TRUE or FALSE? You can also say if you don't know or are not sure about your answer?

Base: Total sample

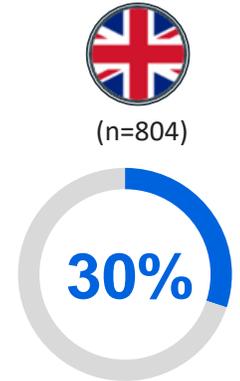
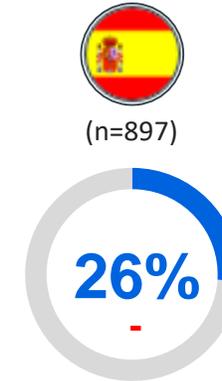
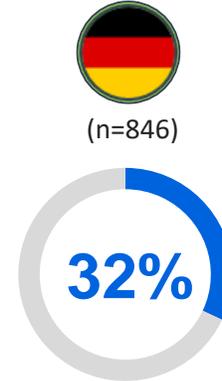
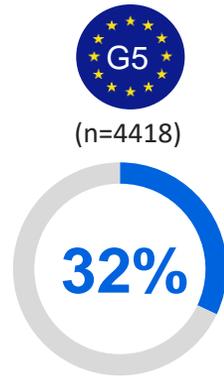
43 - © Ipsos

+ / - Significantly above/below 95% of Total G5

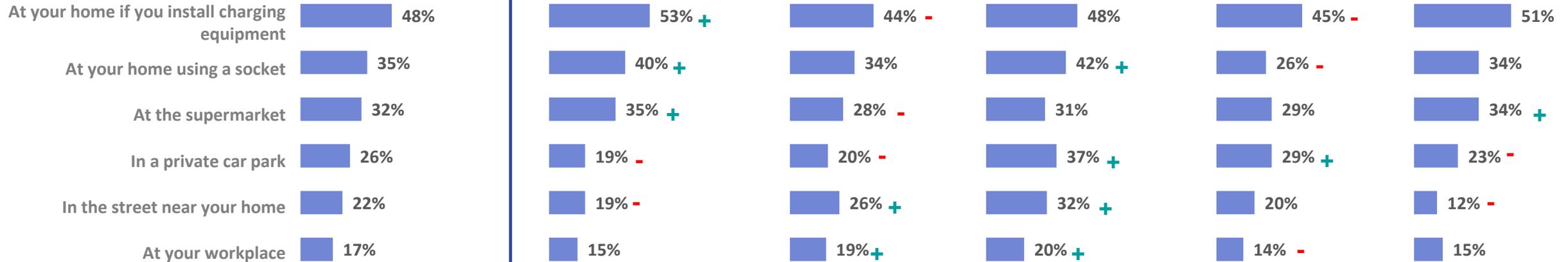
# Only 3 out of 10 Europeans think they have a charging point for electric or plug-in hybrid vehicles near their home (within 5km).



## Knowledge about and access to charging points (% yes)



## Knowledge about possible charging locations (% yes)



Q30. Do you have a charging point for electric or plug-in hybrid vehicles within 5 Km of your home?  
 Q30A. If you had an electric or hybrid vehicle, do you know if you have access to the following charging locations?  
 Base: Has a driver license

# MODE OF TRANSPORT

Covid changes the situation:  
less public transport, more  
consideration of health criteria  
when choosing a mode of  
transport.

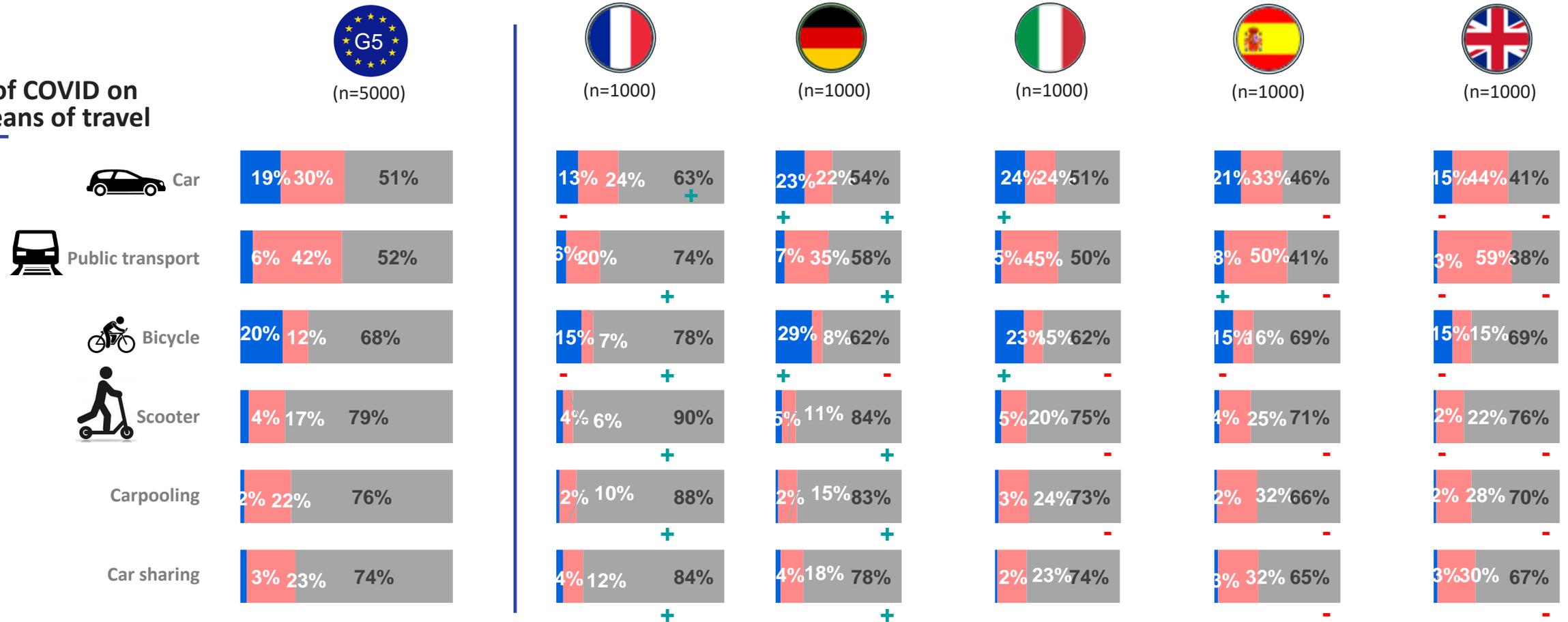


# 3

# With the coronavirus epidemic, cars and bicycles are more popular than before while public transport is less used.



## Impact of COVID on each means of travel



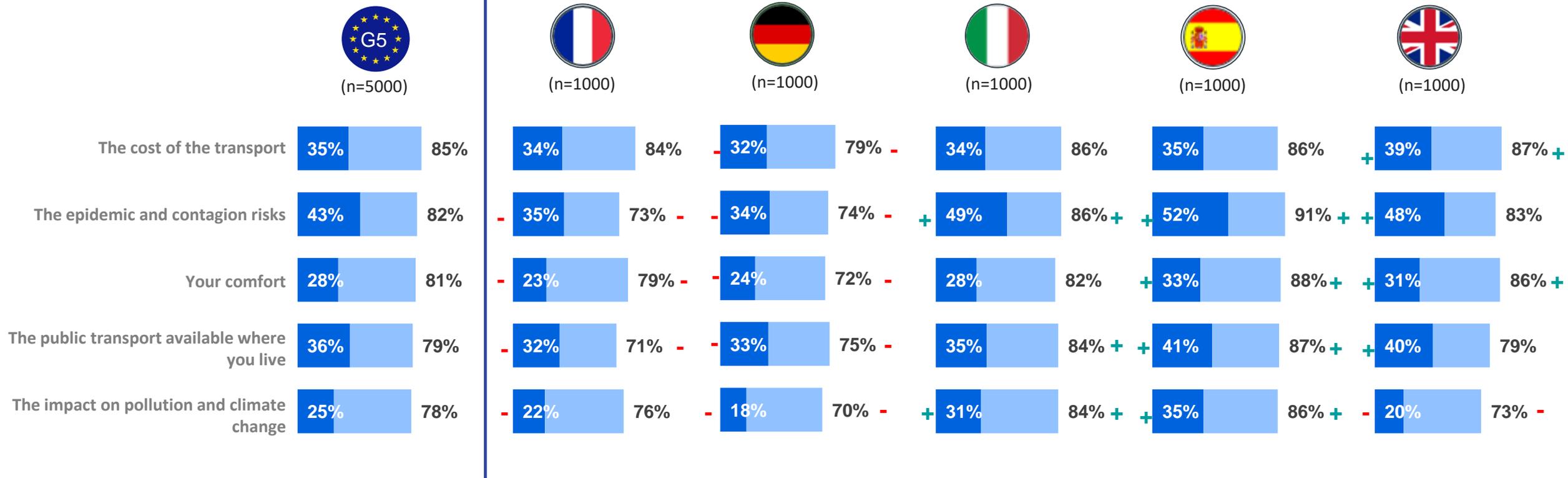
Q12. And since the coronavirus epidemic, do you travel by...?  
Base: Total sample

More often (blue), Less often (red), Much the same (grey)

Overall, the cost of the transport is the main criteria when choosing the mode of transport. But the first answer given concerns the epidemic and contagion risks especially in Spain, Italy and UK.



### Criteria for choosing means of travel



Q13. Are each of the following criteria important when choosing your mode of transport?

Base: Total sample

47 - © Ipsos

Very important (dark blue), Quite important (light blue), Net important (XX)

+ / - Significantly above/below 95% of Total G5

GROUPE RENAULT GAME CHANGERS



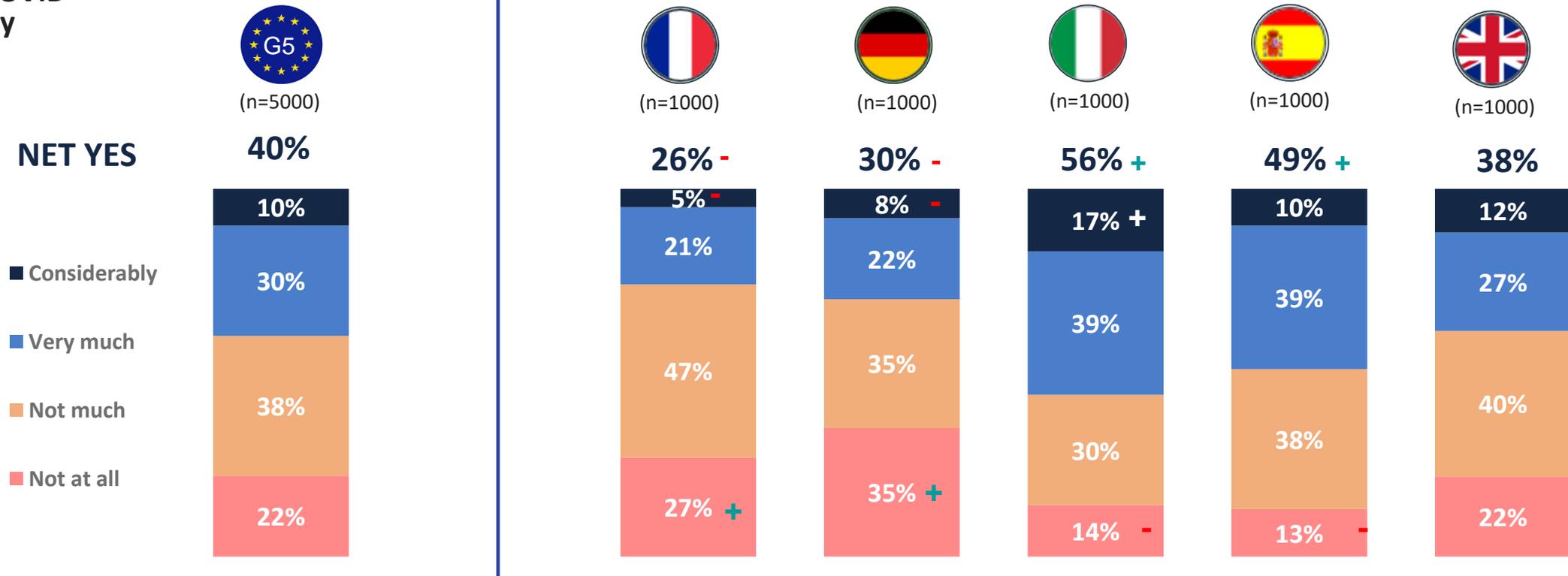
Confidential C

# APPENDICES – OTHER RESULTS

# 4

# The health crisis has disrupted modes of transport especially in Italy and Spain.

## Impact of COVID and mobility



Q11. Would you say the health crisis and its consequences will change the modes of transport you use?

Base: Total sample

49 - © Ipsos

+ / - Significantly above/below 95% of Total G5

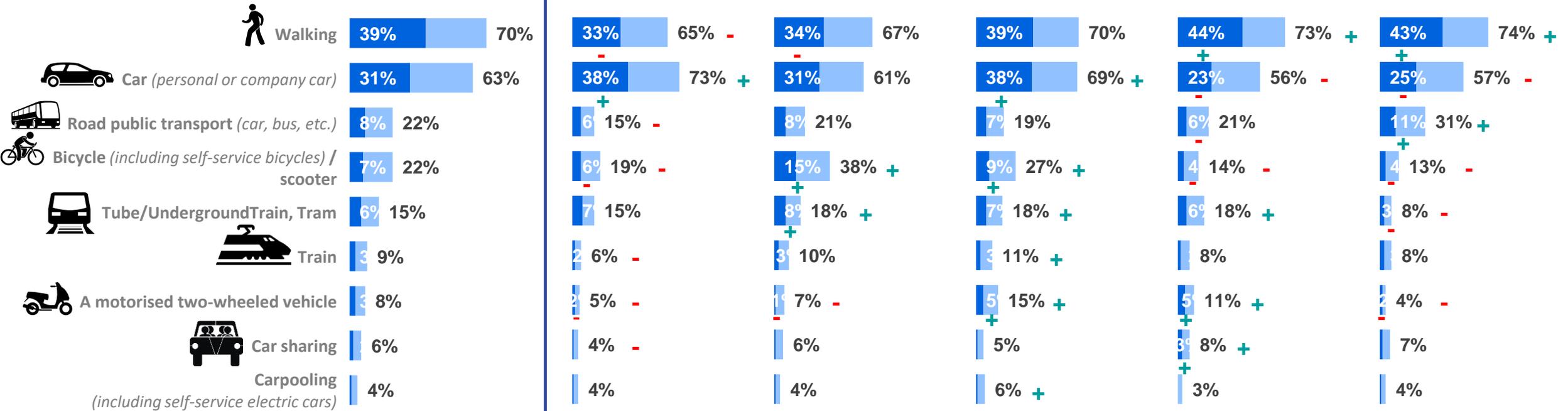


Confidential C

# The means of transport most used several times a week are walking (more in Spain and UK but less in France) and by car (more in France and Italy – less in Spain and UK).



## Modes of transport used



Q6. Which of the following modes of travel do you use?

Base: Total sample

50 – © Ipsos

+ / - Significantly above/below 95% of Total G5

Every day or almost every day
  Several times a week
  XX Net Several times a week

**GROUPE RENAULT** GAME CHANGERS



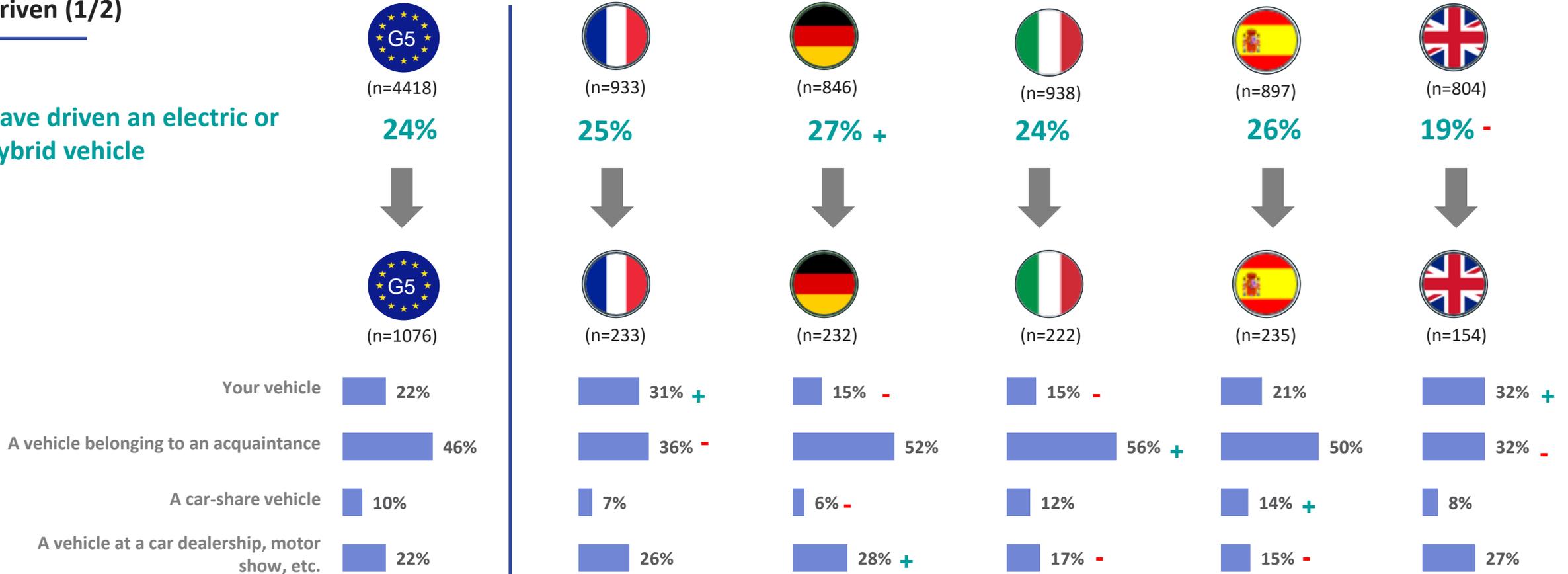
Confidential C

# For the most part, the electric or hybrid vehicle driven was a vehicle owned by an acquaintance.



## Type of electric vehicle driven (1/2)

### Have driven an electric or hybrid vehicle



Q21. Have you already driven an electric or hybrid vehicle?

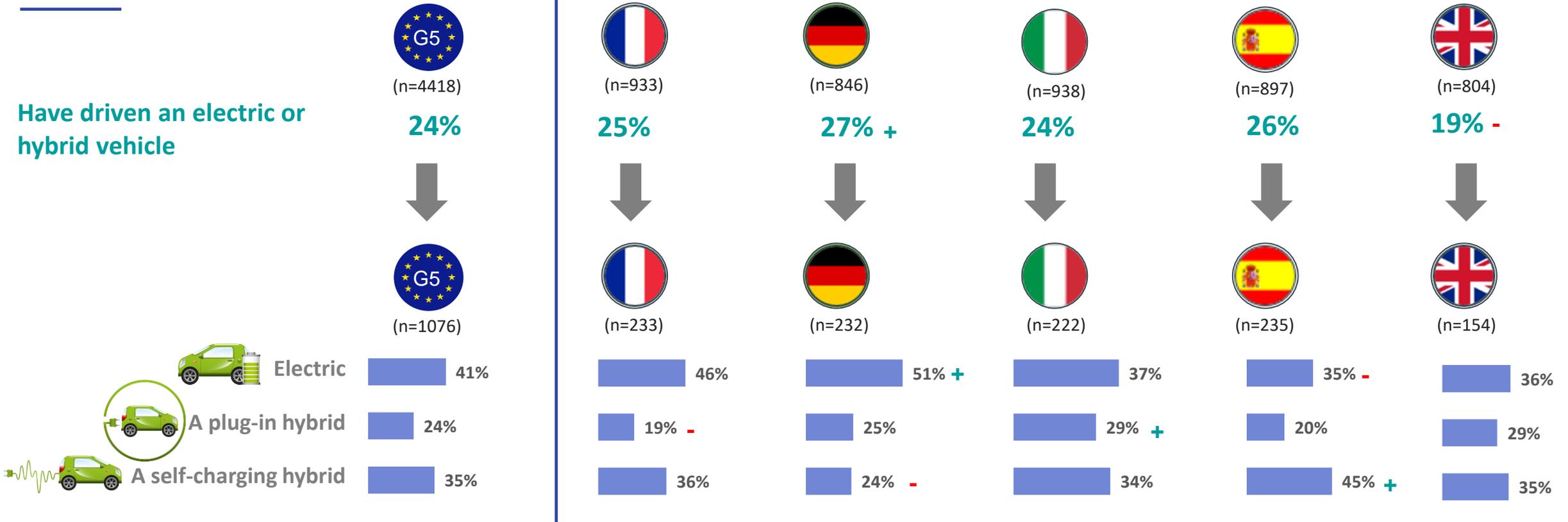
Q22. Have you already driven an electric or hybrid vehicle? *Base: Has a driver license*

# The vehicle driven was most likely to be an electric vehicle, except in Spain where it was a self-charging hybrid.



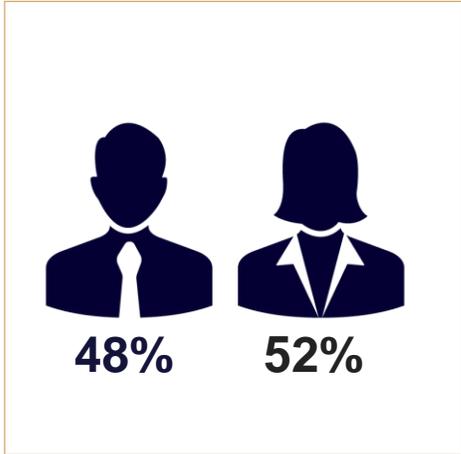
## Type of electric vehicle driven (2/2)

Have driven an electric or hybrid vehicle

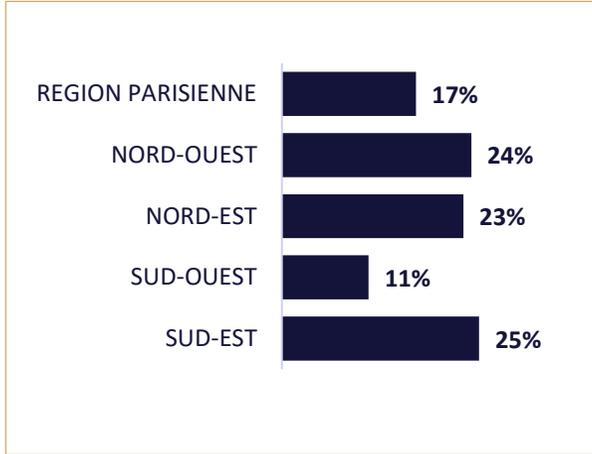


Q21. Have you already driven an electric or hybrid vehicle?  
 Q23. Was the vehicle...? Base: Has ever driven an electric car

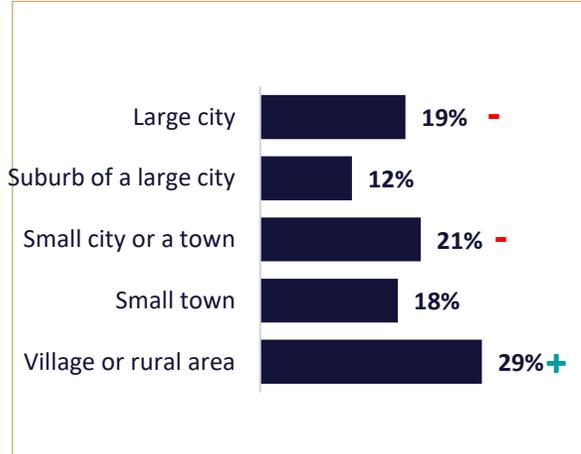
## Gender



## Region



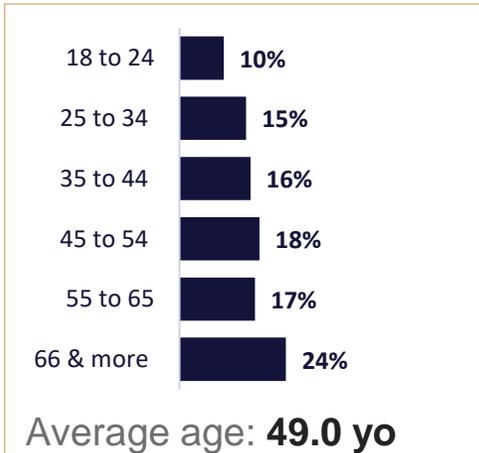
## Marketsize



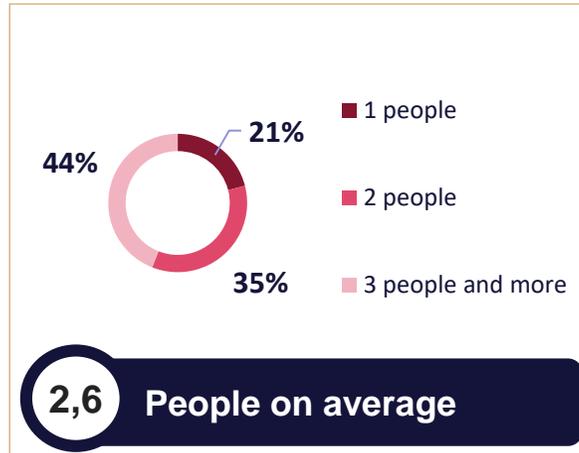
## Occupation



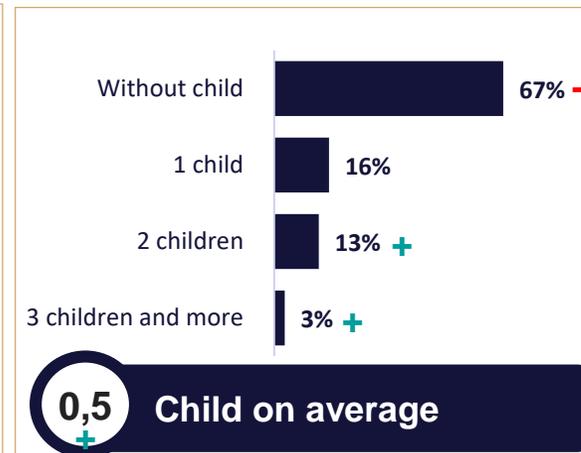
## Age



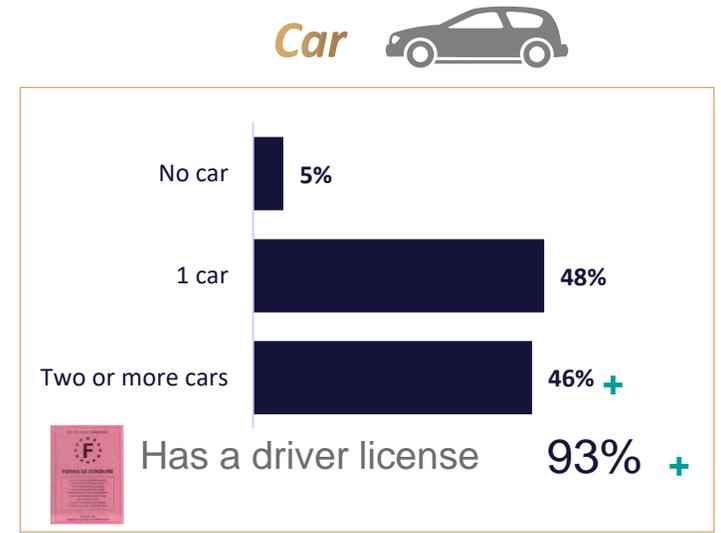
## Household size



## Number of child



## Car



# Socio demographics - Germany



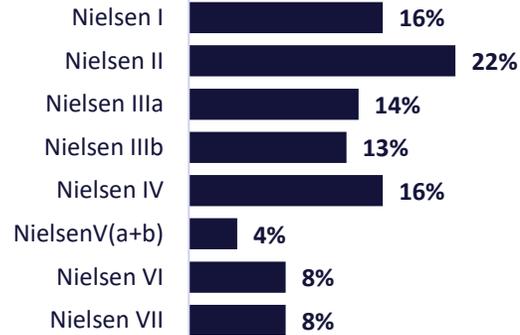
(n=1000)



## Gender



## Region



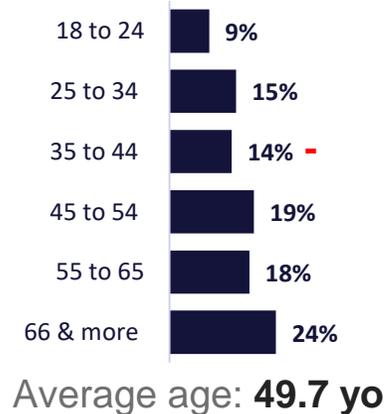
## Marketsize



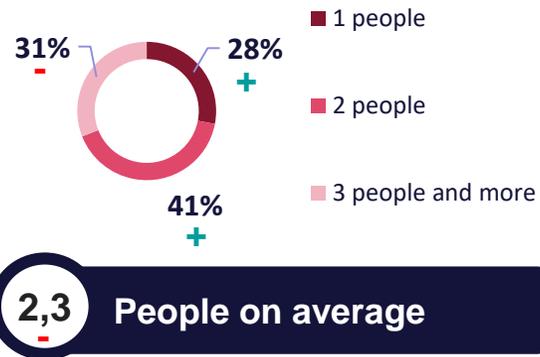
## Occupation



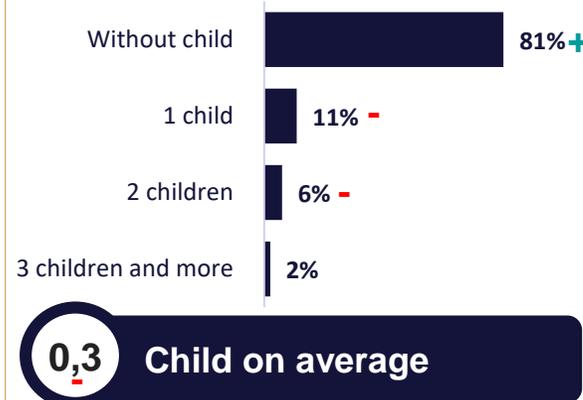
## Age



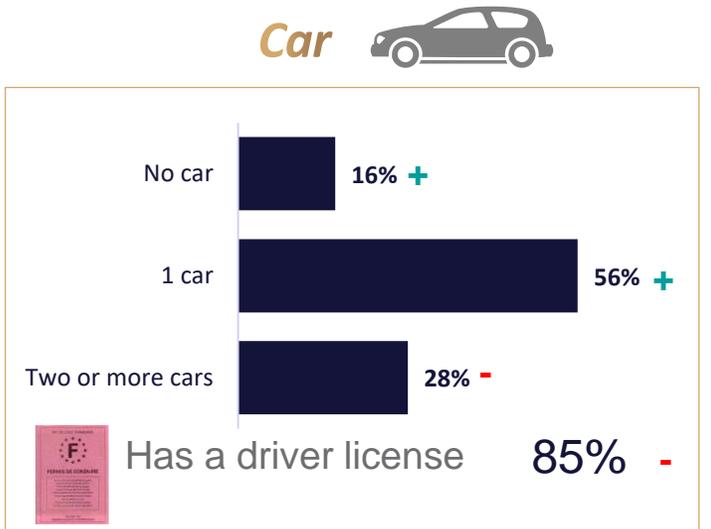
## Household size



## Number of child



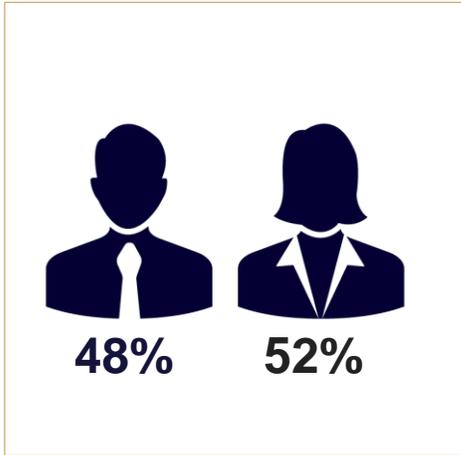
## Car



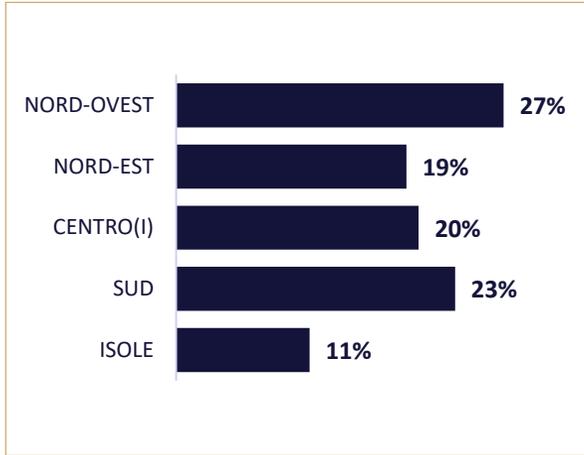
# Socio demographics - Italy



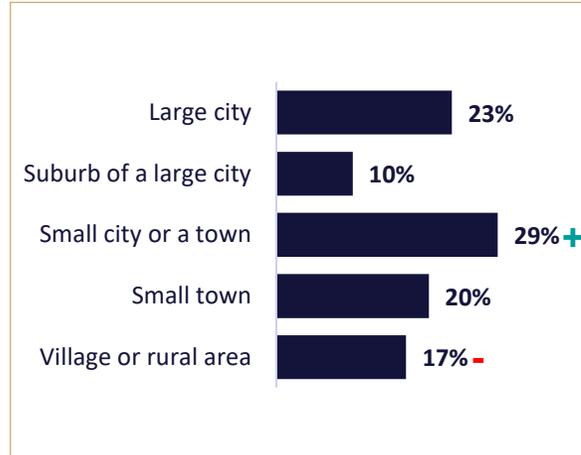
## Gender



## Region



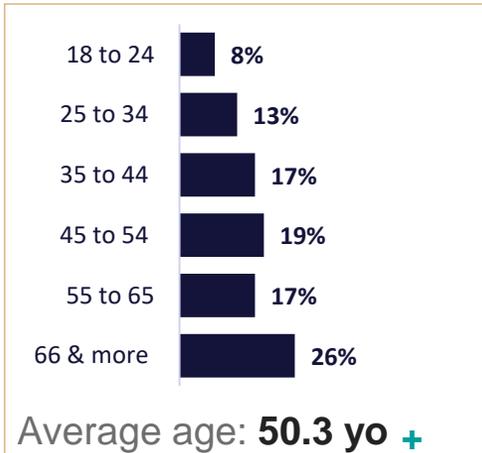
## Marketsize



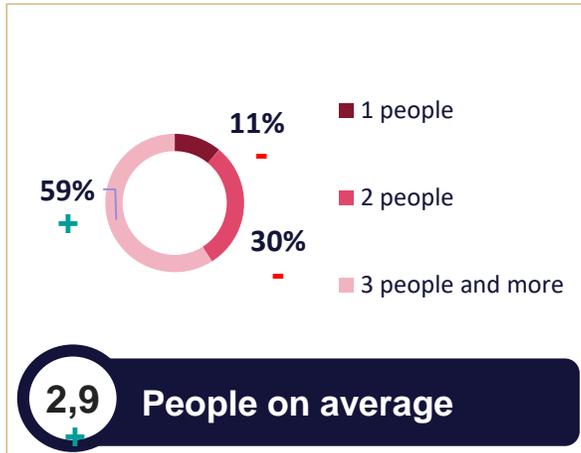
## Occupation



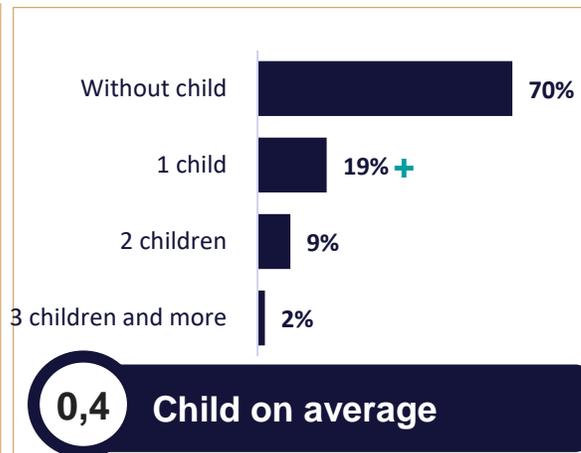
## Age



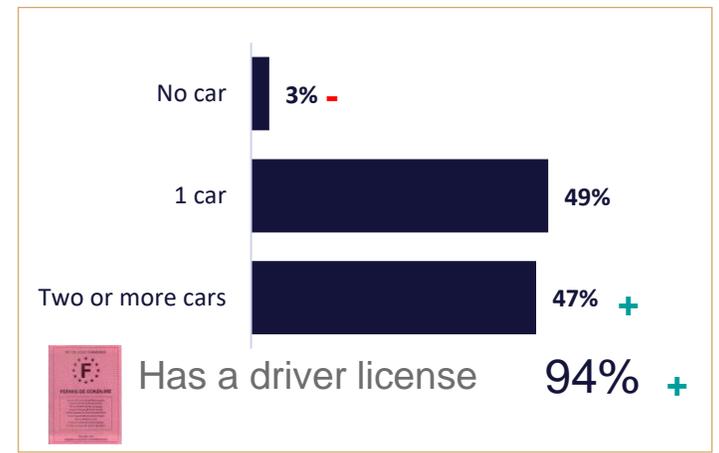
## Household size



## Number of child

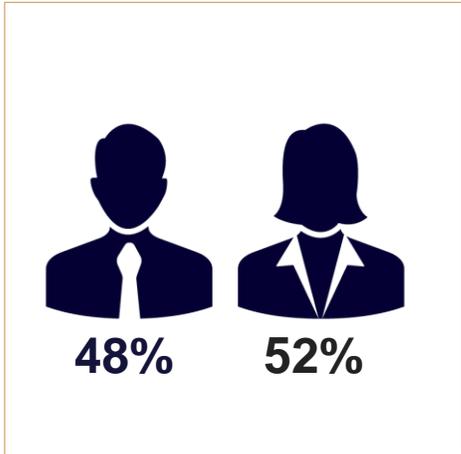


## Car

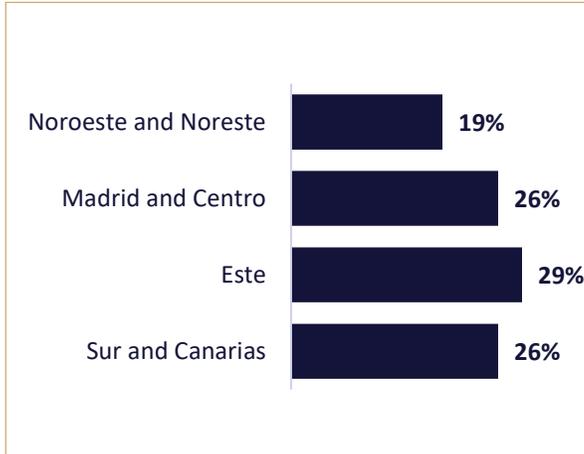


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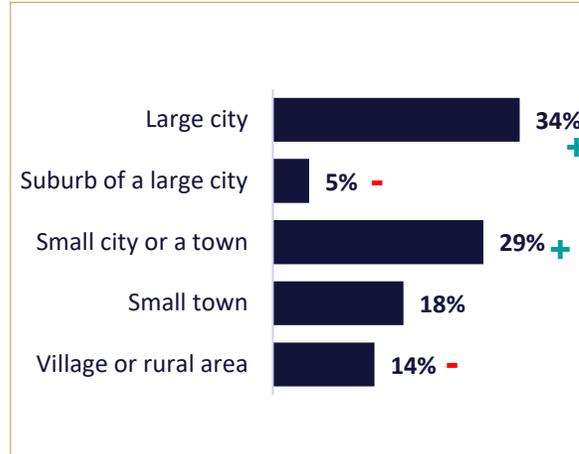
## Gender



## Region



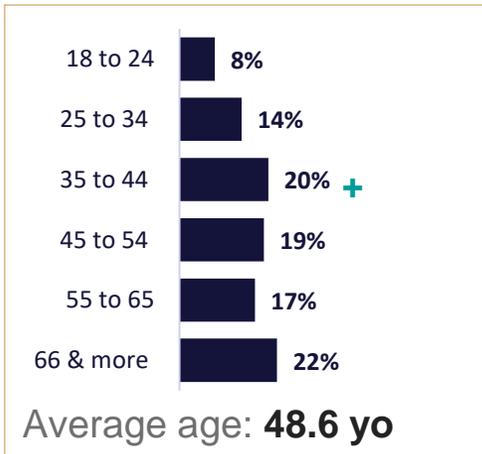
## Marketsize



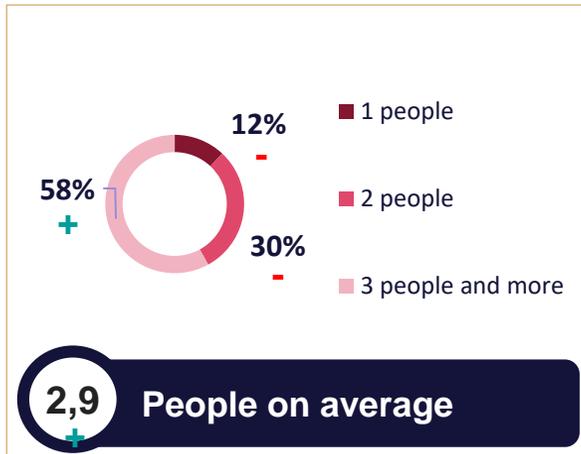
## Occupation



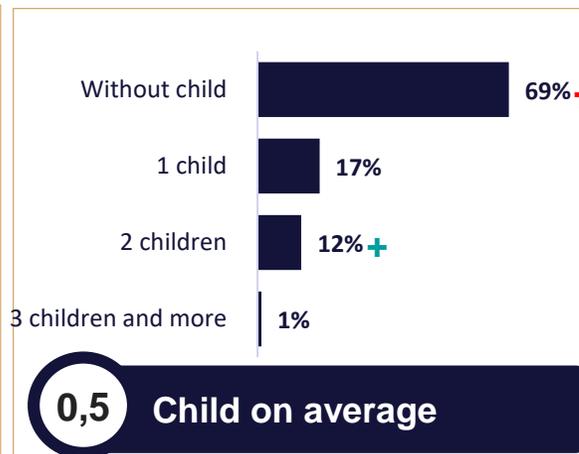
## Age



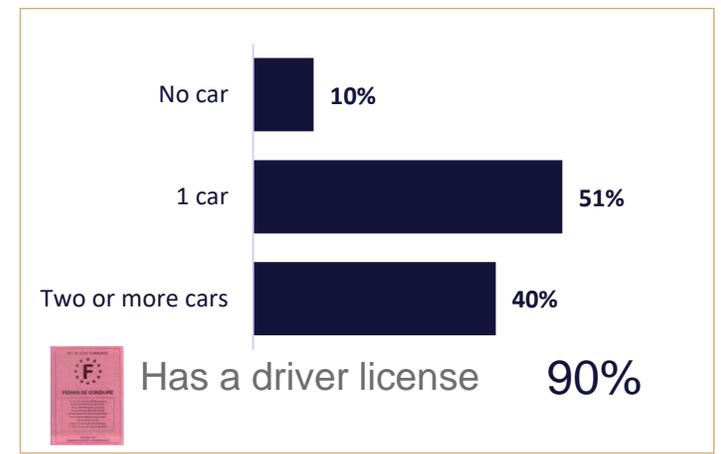
## Household size



## Number of child

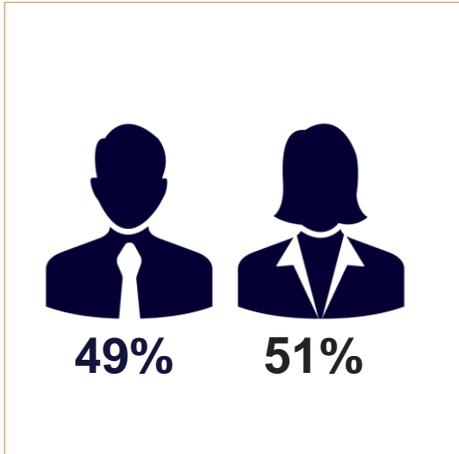


## Car

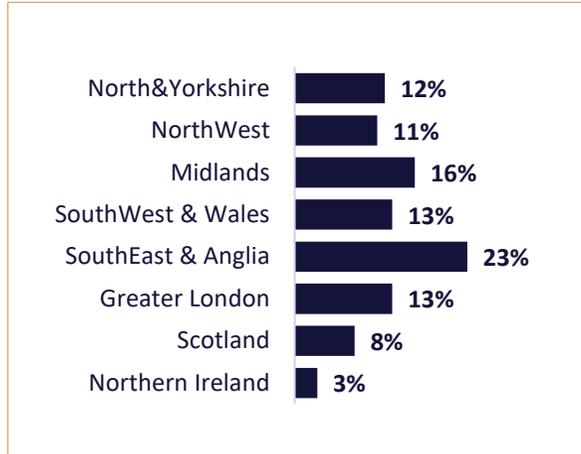


(n=1000)

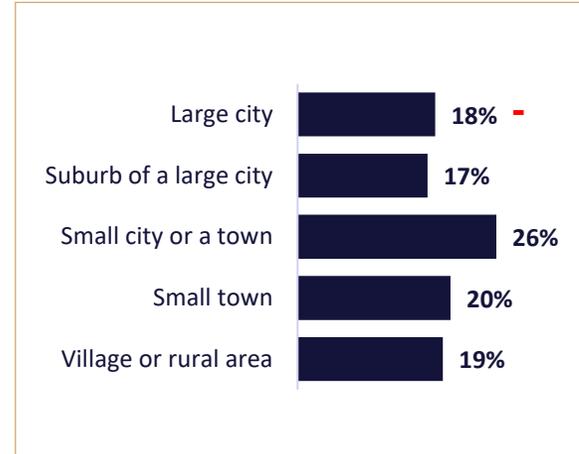
## Gender



## Region



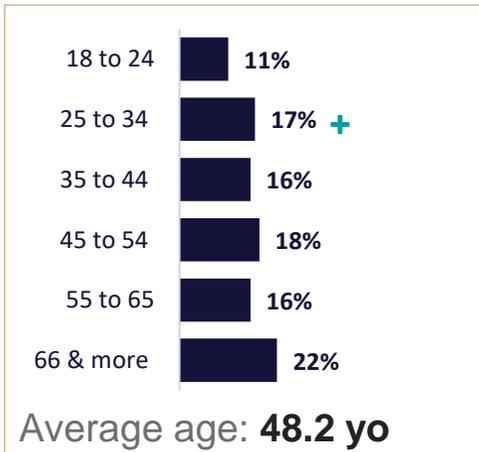
## Marketsize



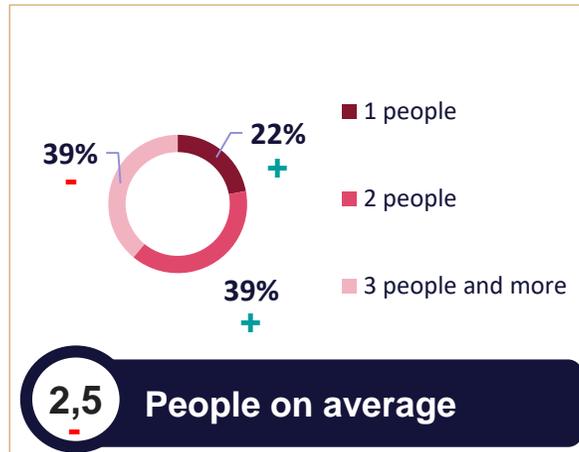
## Occupation



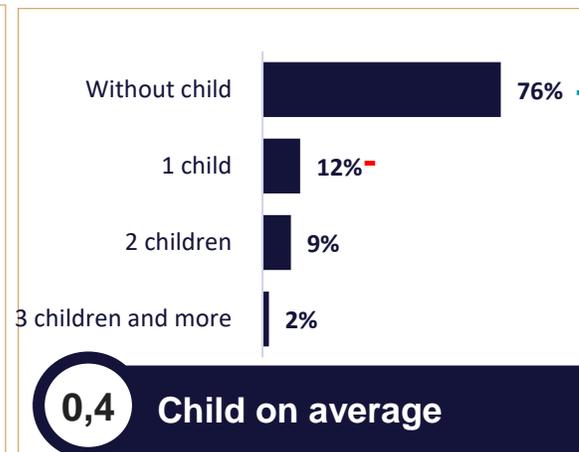
## Age



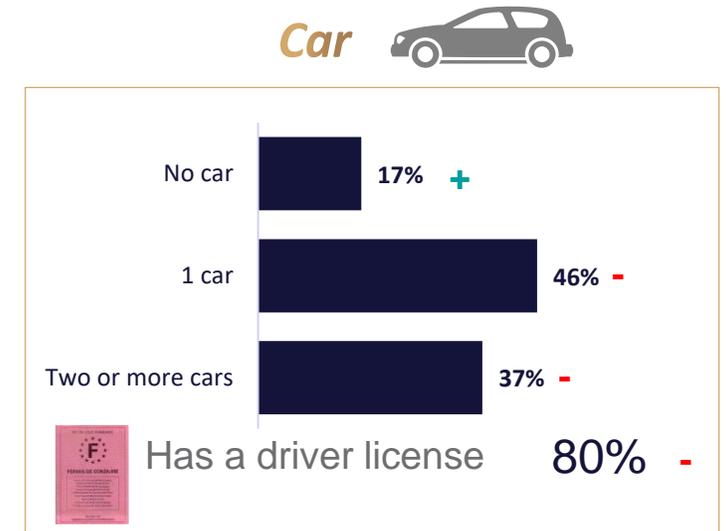
## Household size



## Number of child



## Car



# APPENDICES II



# OUR COMMITMENT



## Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- **SYNTEC** ([www.syntec-etudes.com](http://www.syntec-etudes.com)), French Union of Market Research companies
- **ESOMAR** ([www.esomar.org](http://www.esomar.org)) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying **the ICC/ESOMAR code** for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : <https://www.ipsos.com/en/privacy-data-protection>

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :

- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.



Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION

- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards



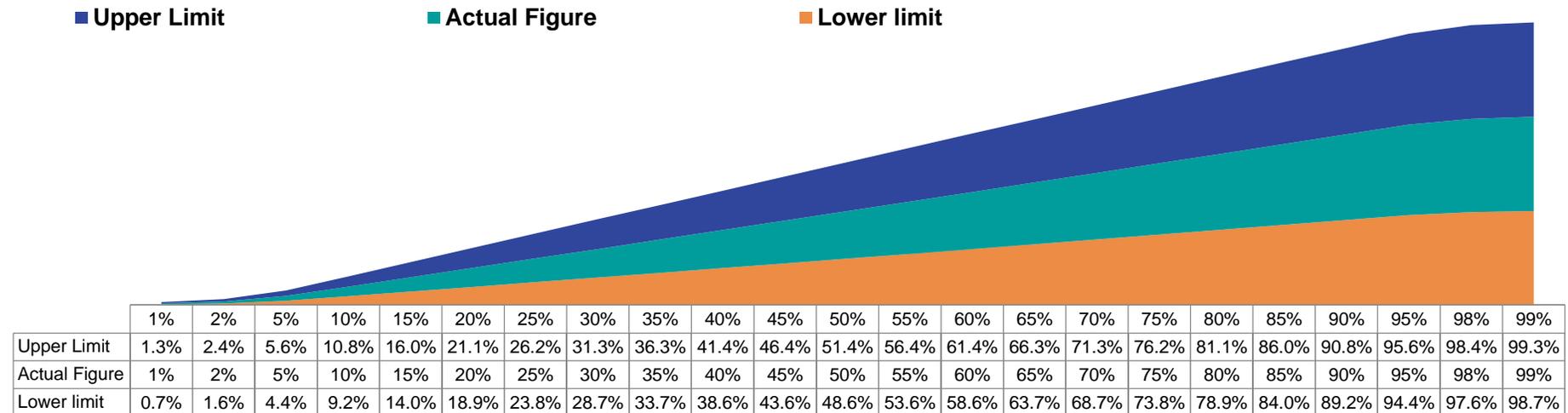


# RELIABILITY OF RESULTS SPREADSHEET

In this instance, with regard to this study:

- Confidence interval: [choose from ] **95%**
- Size of sample: [enter the sample size] **5000**

The proportions observed are between :



# SURVEY OVERVIEW

## CAWI survey – Online panel



### SAMPLE

- **Target** : Male or female who have 18 yo and more
- **Selection of the respondent** : participant selection using a quota.
- **Sample representativeness** : gender, age and regions (Eurostats data - 2018)



### DATA COLLECTION

- **Fieldwork dates** : 12nd to 21<sup>st</sup> of August 2020
- **Sample achieved** : 5000 interviews (1000 interviews in each country)
- **Data collection** : on line
- **Loyalty program with points- based award system for panelists**
- **Response quality control methods: monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)**



### DATA PROCESSING

- Weighted sample
- Weighting criteria: gender, age and regions

# RELIABILITY OF RESULTS : SELF COMPLETION ONLINE SURVEYS IIS

To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

## UPSTREAM OF THE DATA COLLECTION

- **Sample** : structure and representativeness
- **Questionnaire** : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**
- **Data collection** : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

## DURING THE DATA COLLECTION

- **Sampling** : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

- **Fieldwork monitoring** : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

## DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

# SURVEY OVERVIEW

## Organization (CAWI survey - Online panel)



### ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results
- Oral presentation Analyses and summary



### ACTIVITIES CARRIED OUT BY EXPERT LOCAL TEAMS

- Sampling (IIS panel)
- Emailing
- Data collection in France / UK / Germany / Spain and Italy
- Data Map
- Data processing



### ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

- Translation
- Formatting the results

# SURVEY MATERIAL

## THE QUESTIONNAIRE(S)



Questionnaire  
France



Questionnaire  
Germany



Questionnaire  
Italy



Questionnaire  
Spain



Questionnaire UK

# ABOUT IPSOS

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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  
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# GAME CHANGERS

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In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:  
**You act better when you are sure.**

**THANK  
YOU**

**GAME CHANGERS**

