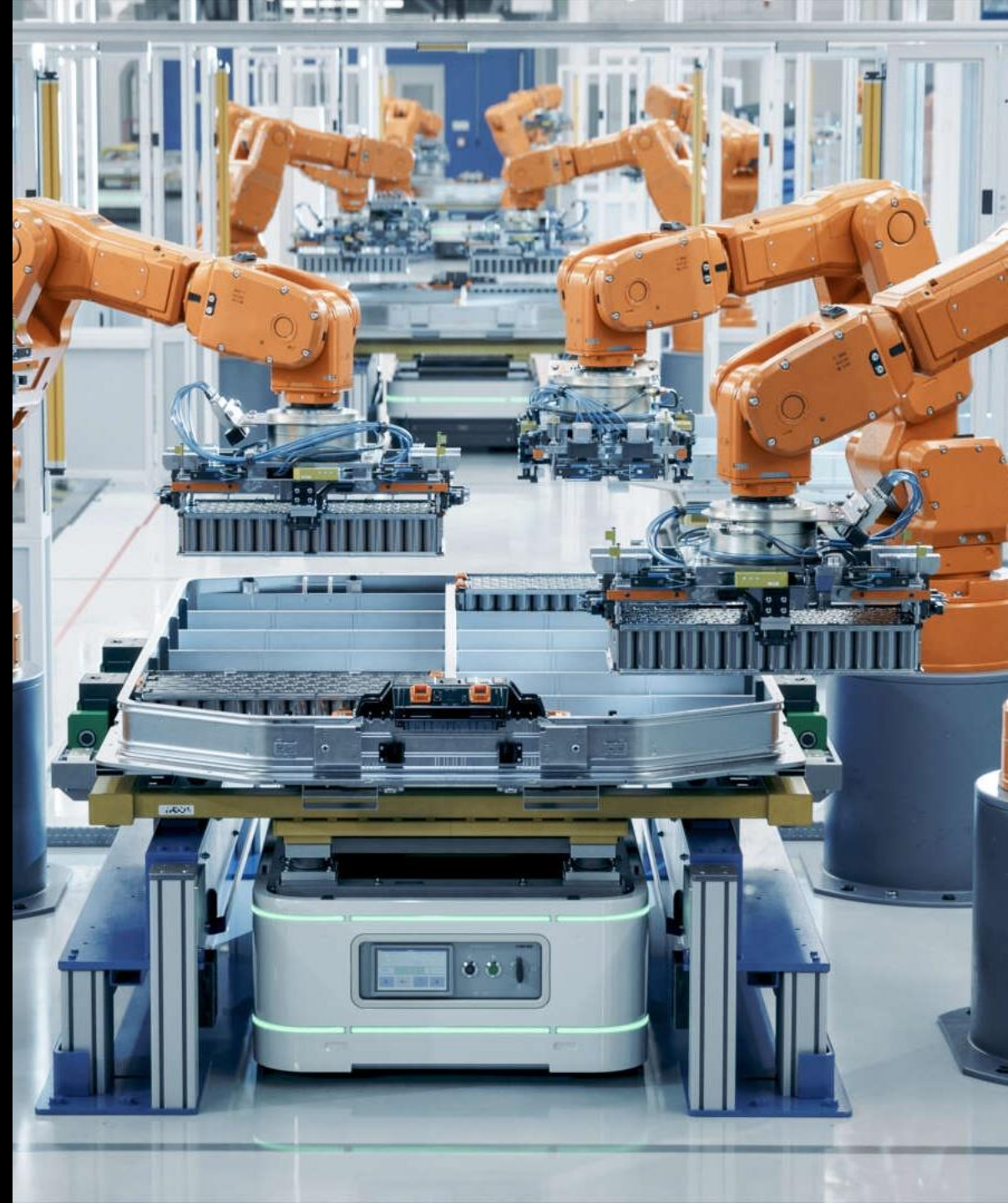


Polk Audiences

Electrification Impact Q4, 2024



Electrification (Hybrid & EV)

Whether your views on the pace of BEV adoption are optimistic or pessimistic, electrified vehicles are here, and more are on the way.

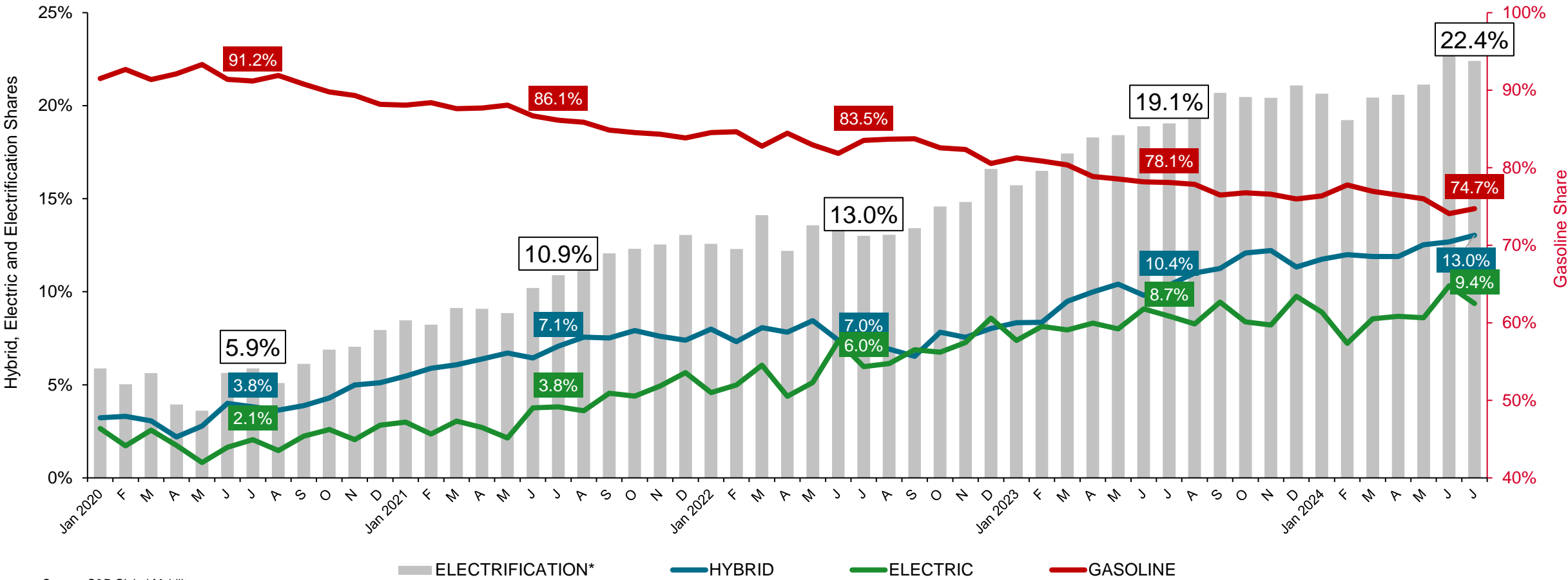
The industry's path to electrification, while bumpy, is progressing, giving consumers more vehicle options and choices than ever before.

As vehicle supply and the number of available models rise, so does competition for consumer attention. Different vehicle types and buying motivations, increases the importance in utilizing advanced audiences for targeted, dynamic messaging.

Today's car shoppers expect personalization and relevant offers and with over 200 hybrid and EV designed segments, Polk Audiences help marketers connect more effectively to these consumers.



EV, hybrid, and combined retail shares reach record levels in June 2024

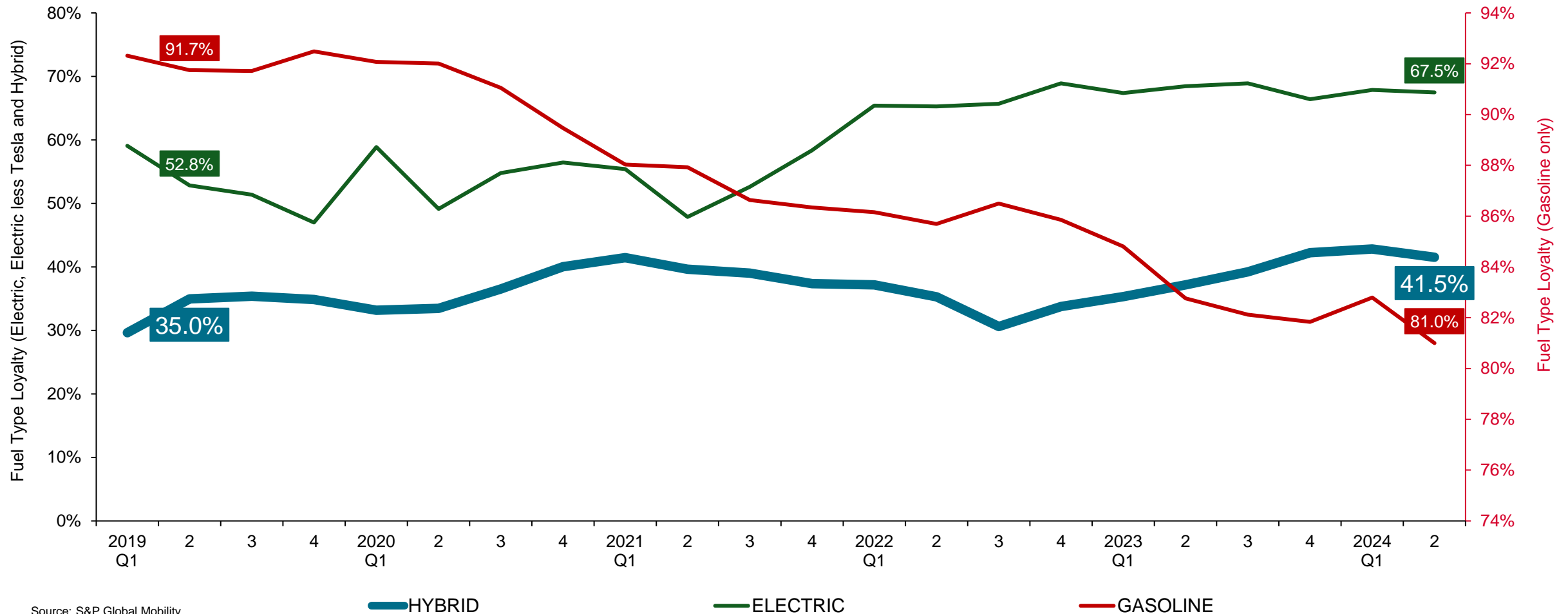


Source: S&P Global Mobility

*Electrification includes electric and hybrid shares
Gasoline includes FLEX
Registration Type: Retail (19)

Hybrid loyalty surpassed 40% and reaching new records

An 11.5% increase in loyalty rate versus year ago



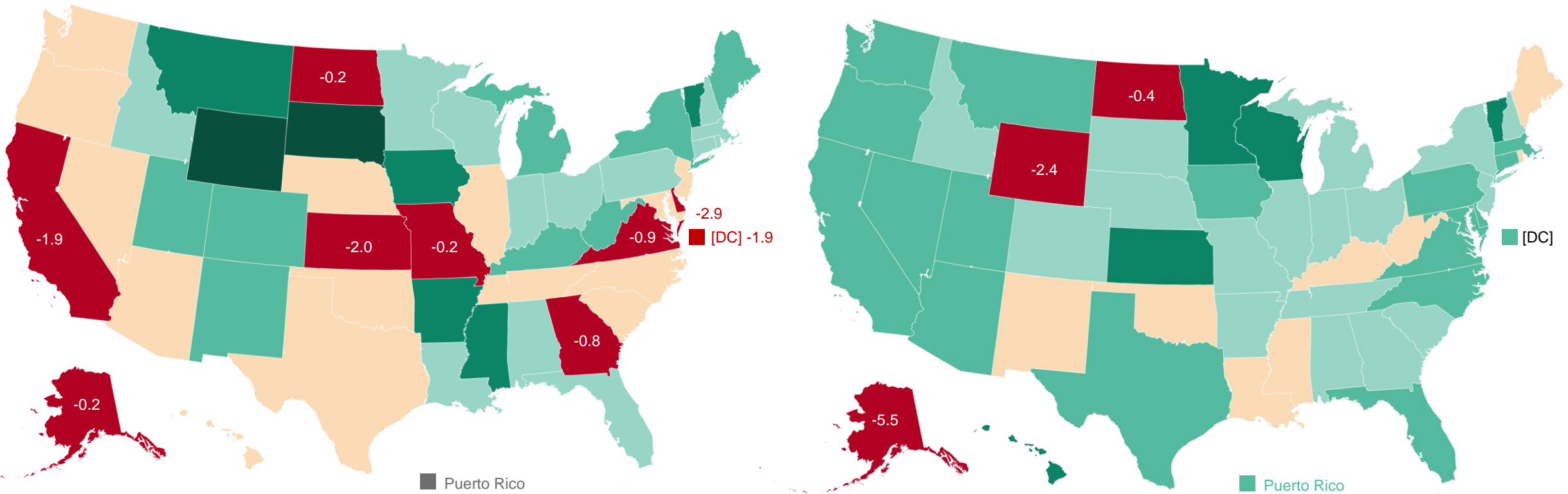
Source: S&P Global Mobility

From coast-to-coast, hybrid is fueling the electrification transition

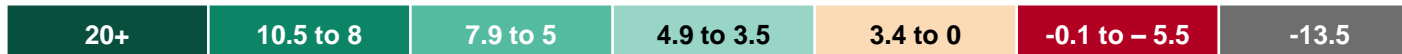
Hybrid loyalty is rising across most of the US

ELECTRIC

HYBRID



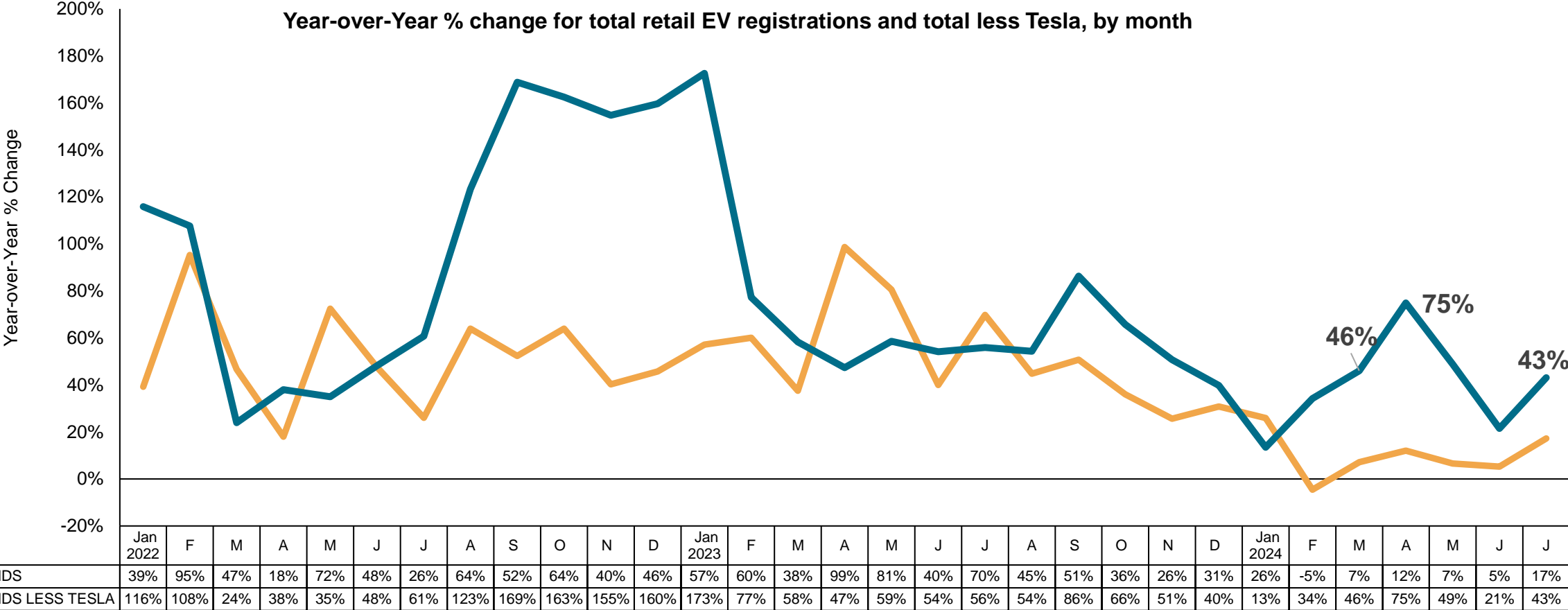
Source: S&P Global Mobility



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Tesla, once the bell weather of EV performance, now lags the overall market

Non-Tesla EV growth above 40% in three of last four months



Polk Audiences: Electrification portfolio

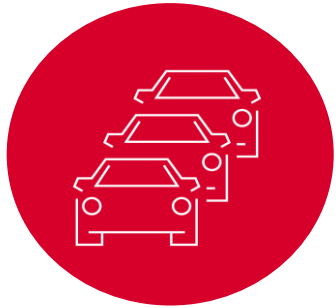
- Electrified taxonomy for entire marketplace
 - Owner audiences and In-market audiences for every vehicle segment, make and model
 - **Buying motivations**
 - New purchase is vehicle addition
 - New purchase to replace a current vehicle
- Expanding portfolio
 - +25% more segments versus year ago
 - **60+ new segments for Hybrid shoppers**



**200+
EV & Hybrid
segments**

Exclusive EV and Hybrid In-Market Segments

Marketers can target by garage profiles and customer buying motivations



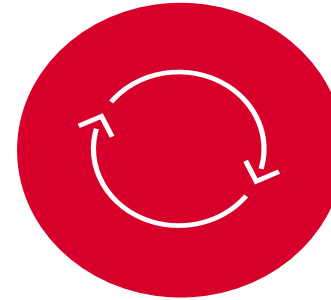
Vehicle Additions Buying Electrified as:

Adding to garage

- Add EV to garage and keep existing vehicles
- Add Hybrid to garage and keep existing vehicles
- Owns EV and adding an EV
- Owns Hybrid and adding Hybrid

First new vehicle purchase

- First vehicle purchase is an EV
- First vehicle purchase is Hybrid



Vehicle Replacement Buying Electrified to:

Replace vehicle

- Replace ICE with EV
- Replace EV with EV
- Replace ICE with Hybrid
- Replace Hybrid with Hybrid

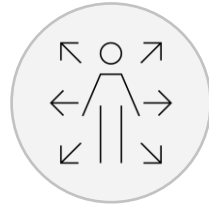
Extensive Electrification Audience Suite

Built from rich knowledge, robust data sets and industry leading expertise



Owner Audiences

- Aggregated vehicle information by fuel type
- Vehicle disposal behavior



Comprehensive Customer Profiles

- Garage profile – vehicles owned
- HH demo and lifestyle attributes



New Electrification Buying Behavior Profiles

- Full understanding of different EV and Hybrid customers and buying motivations
- Migration patterns by segment, class and fuel type



Best-in-Class

- Industry leading, proprietary modeling capabilities

S&P Global
Mobility

To learn more and receive a copy of our Electrification segments menu contact your Polk Automotive Solutions representative or

Email
mobility@spglobal.com

