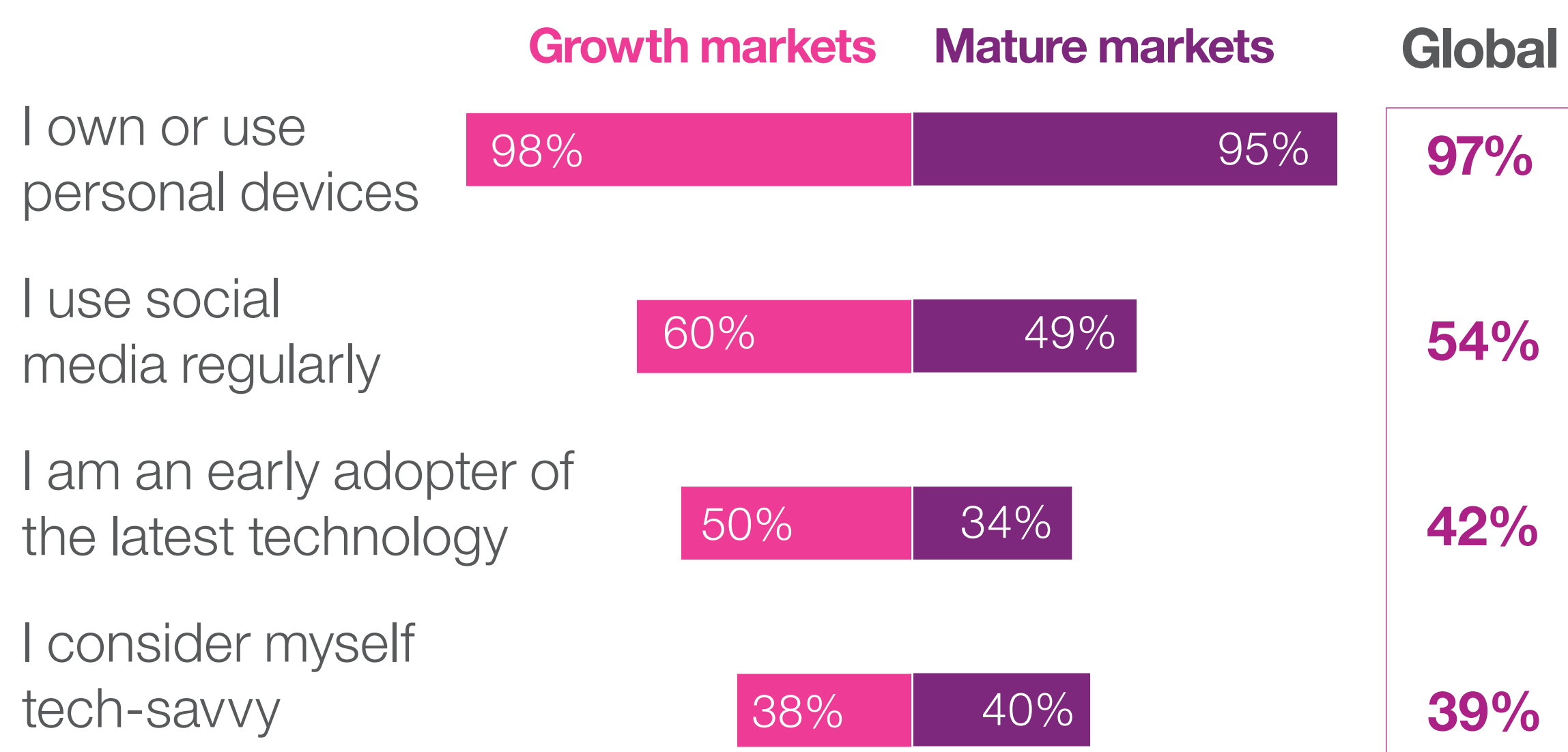


A New Relationship – people and cars

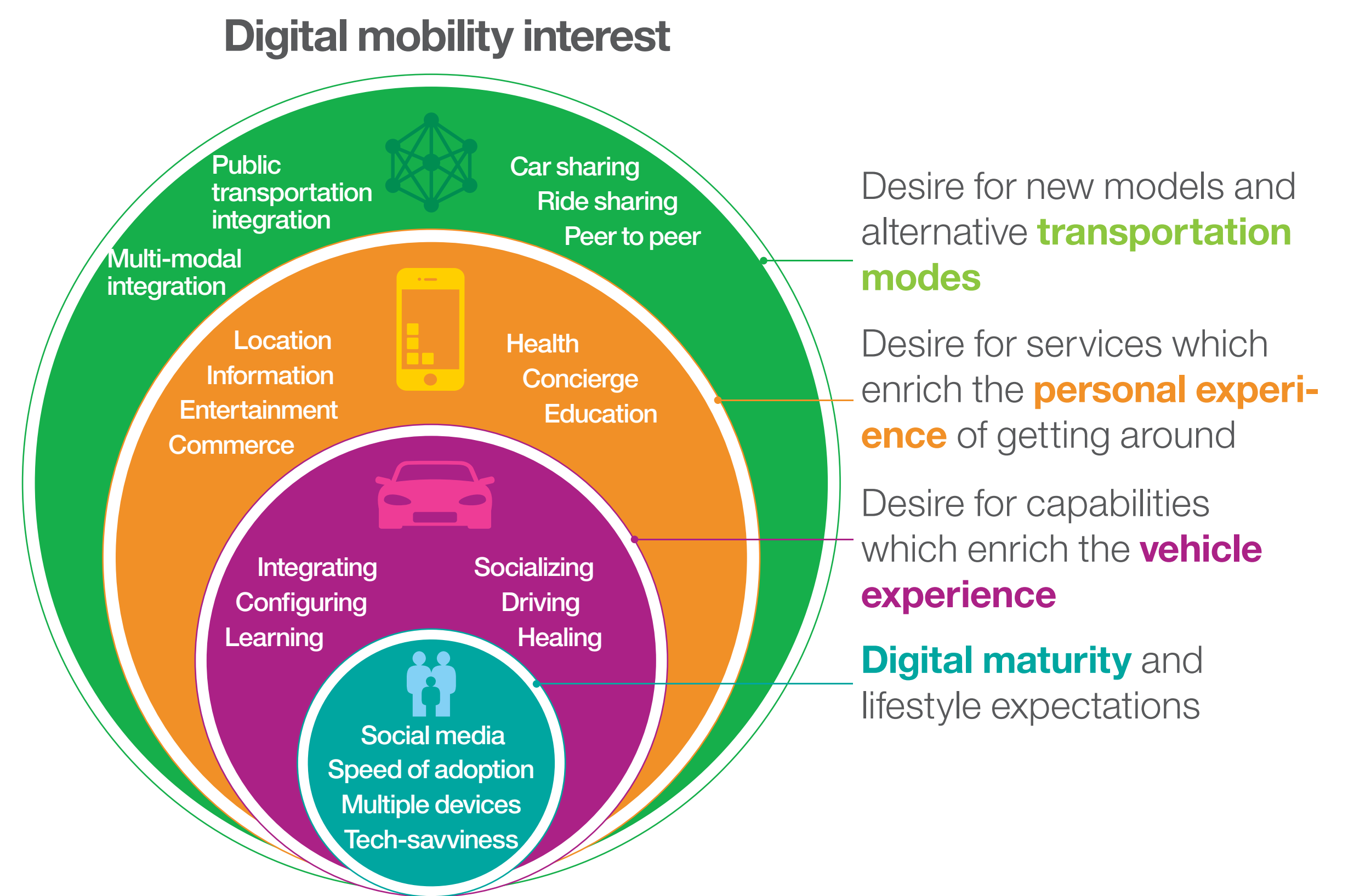
Examining people based on their technical readiness and mobility expectations provides four distinct groups

The digital relationship people have will be different based on how mature they are with digital technologies



Analysis of 16,469 consumers across the top 16 automotive markets

Combining the different aspects of future mobility needs with digital maturity gives a clearer view of consumer interest



Four distinct groups of people emerge with similar attributes

Pacesetters

Early technology adopters, excited to try new mobility services and options



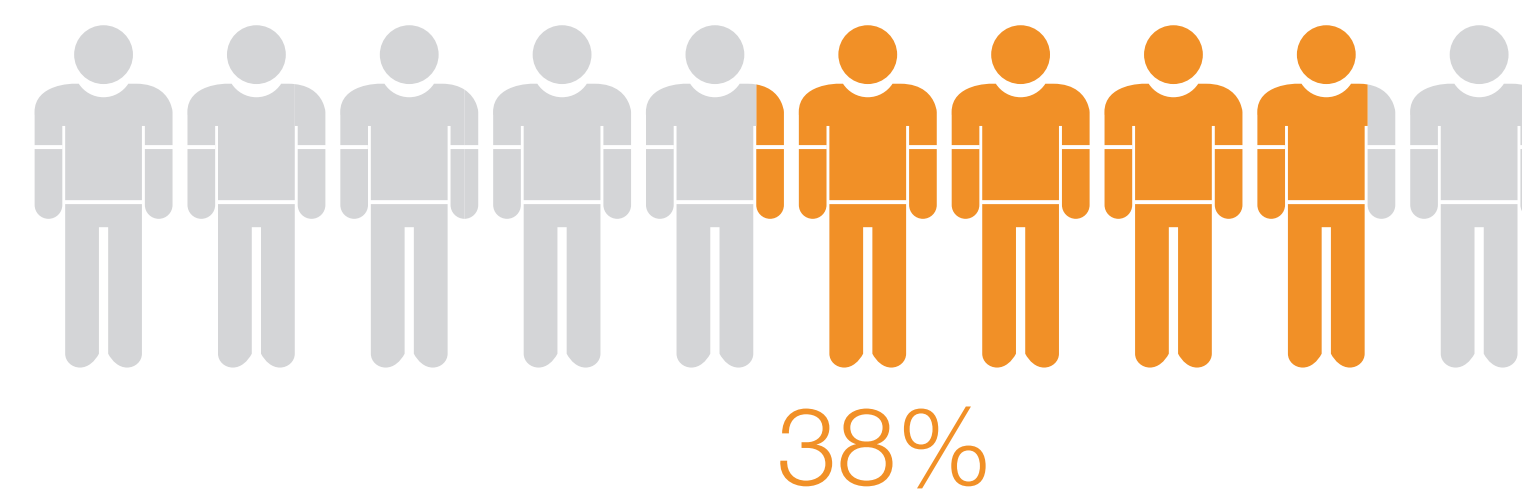
Fast Followers

Watches Pacesetters and close behind in adoption speed; uses many mobility services and options



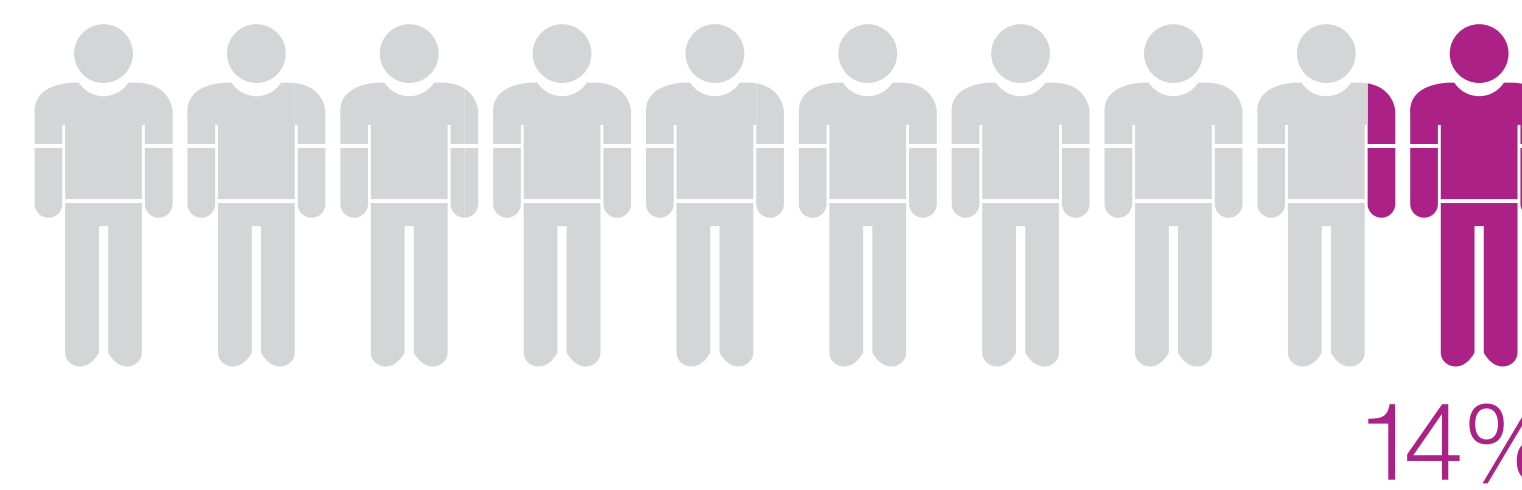
The Pack

Views technology conservatively, but eventually open to it when value is established



Spectators

Happy with status quo; low technology adoption and inflexible with new mobility solution



Segmenting consumers based on their digital mobility interest gives automakers a better chance of aligning consumer abilities, vehicle capabilities and mobility solutions.