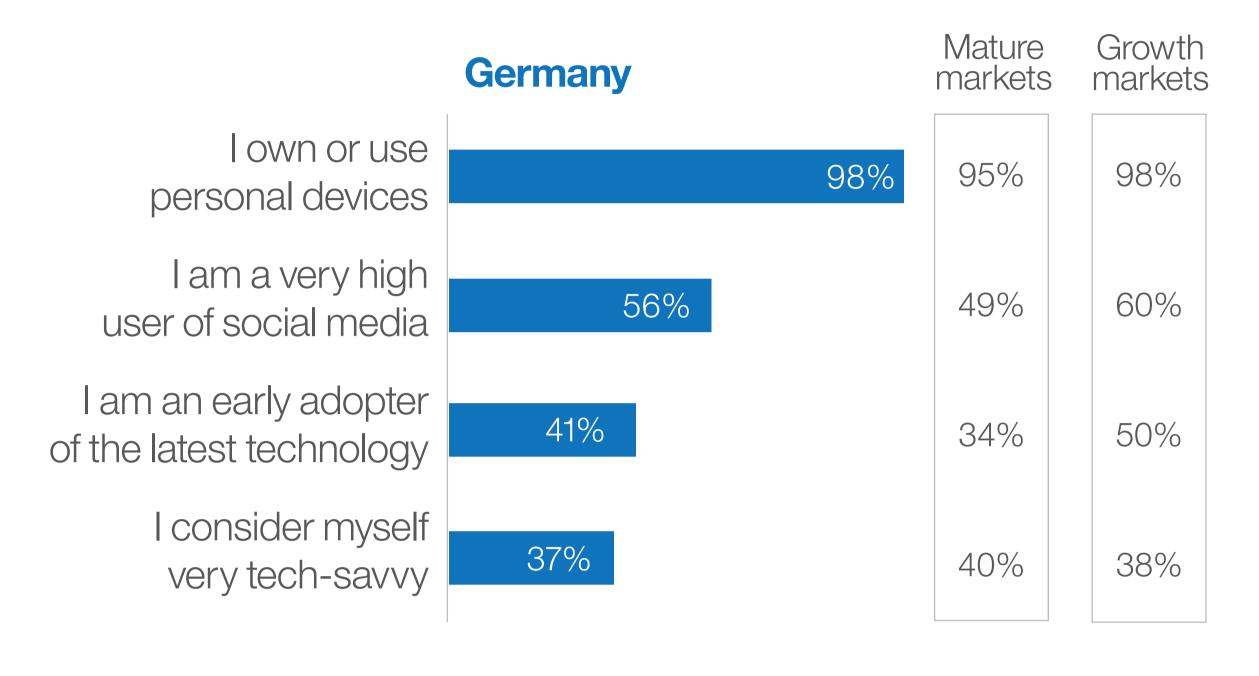
# A new relationship – people and cars in Germany

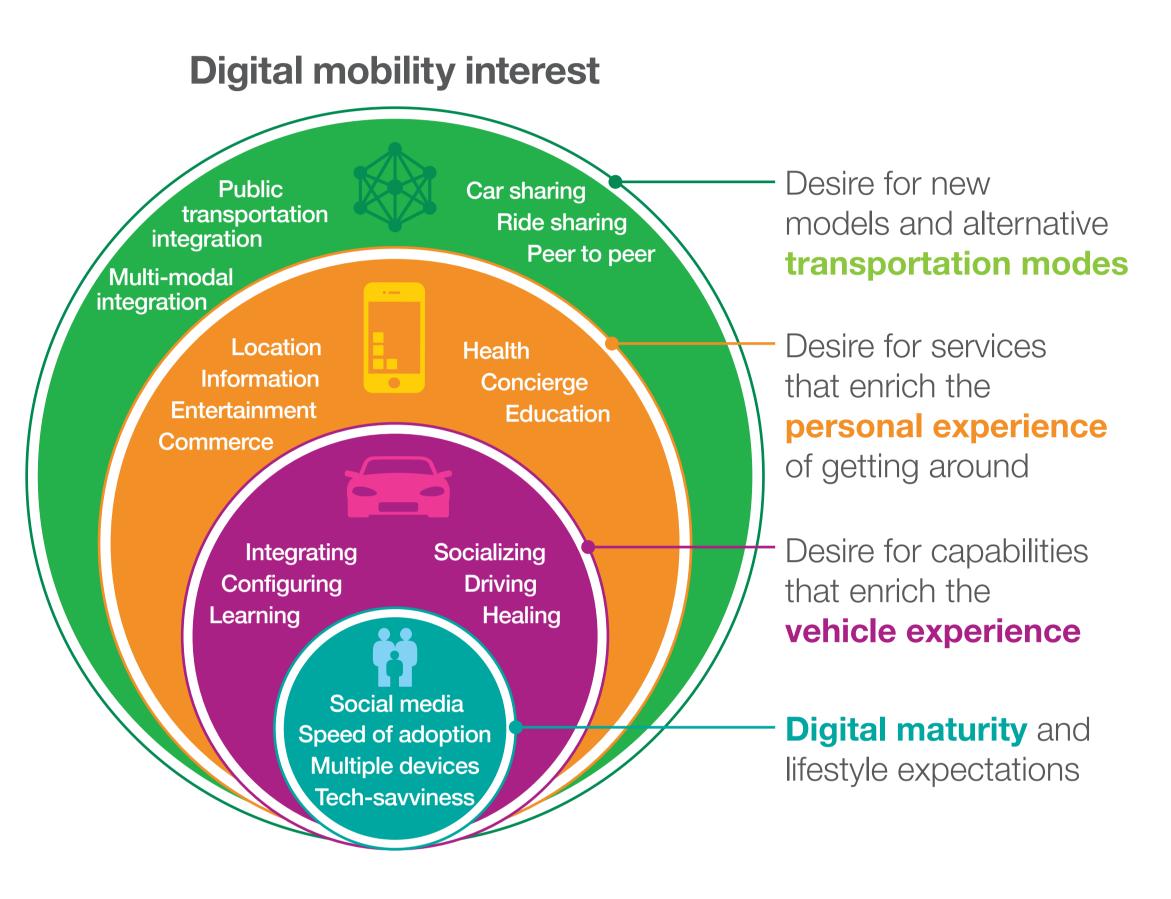
Examining people based on their technical readiness and mobility expectations provides four distinct groups

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, eager to try new mobility services and options

#### **Fast Followers**

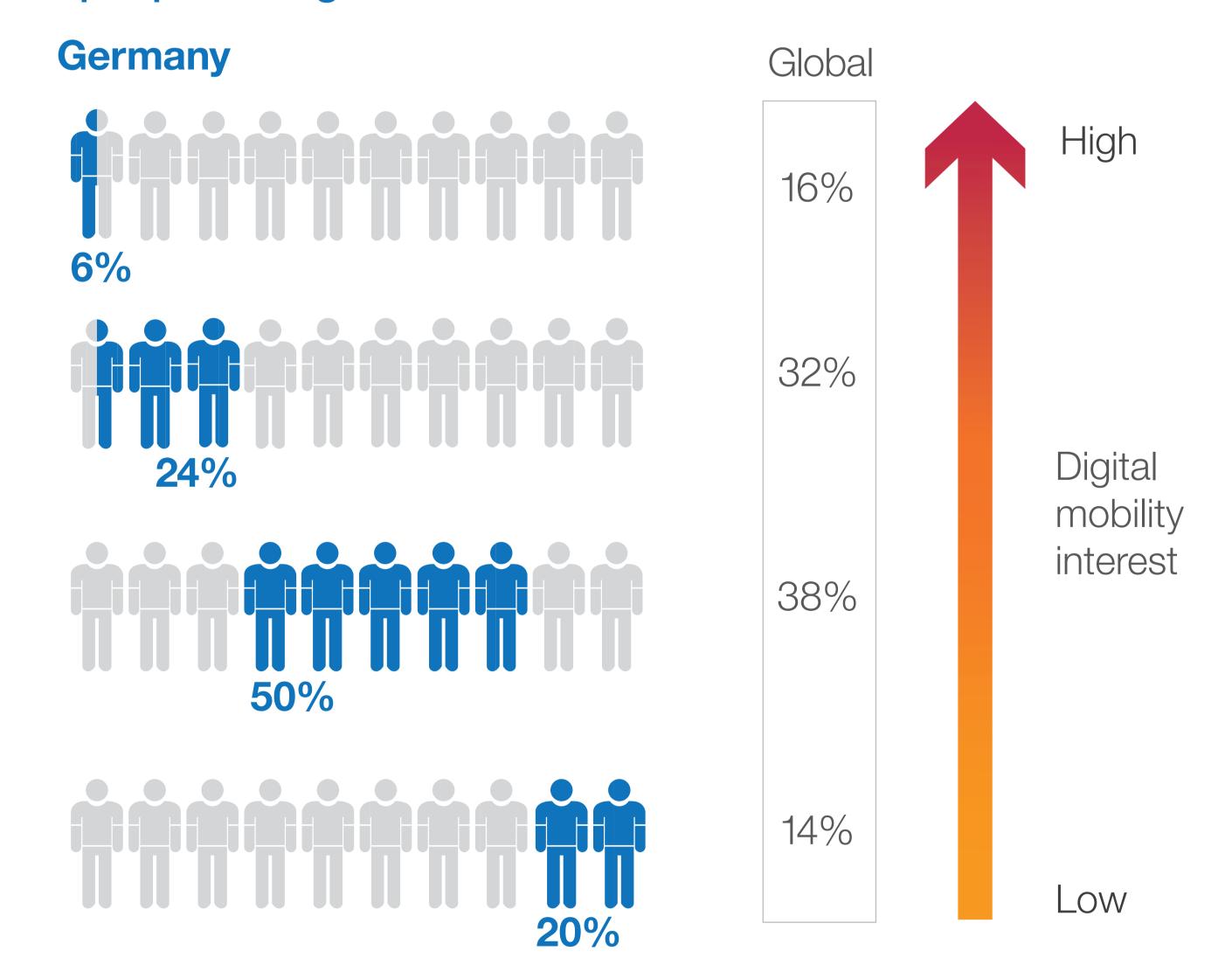
Watch Pacesetters and close behind in adoption speed; use many mobility services and options

### The Pack

View 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.

