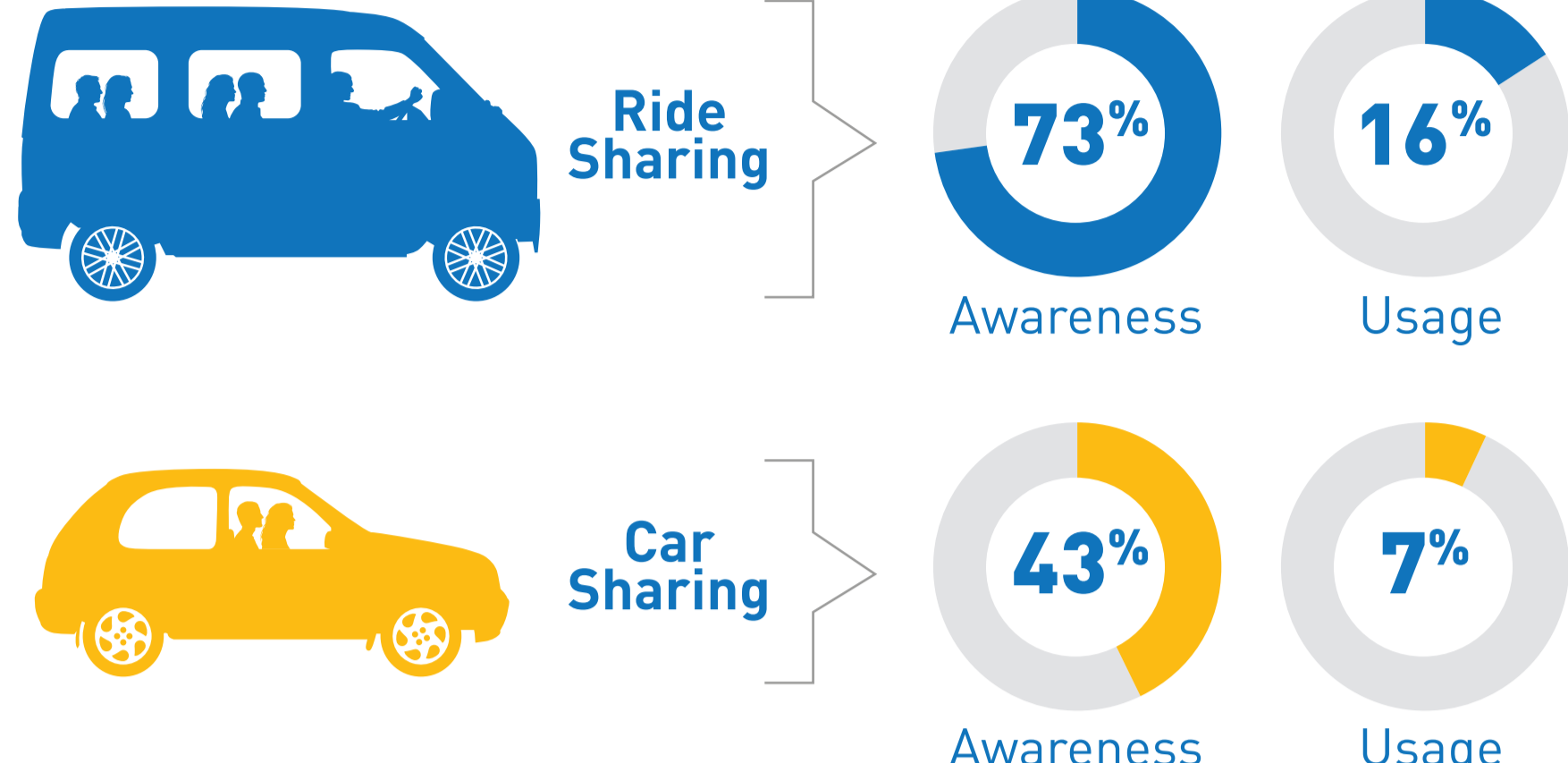




Ride Sharing and Car Sharing are **NOT** an Imminent Threat to Car Leasing/Ownership

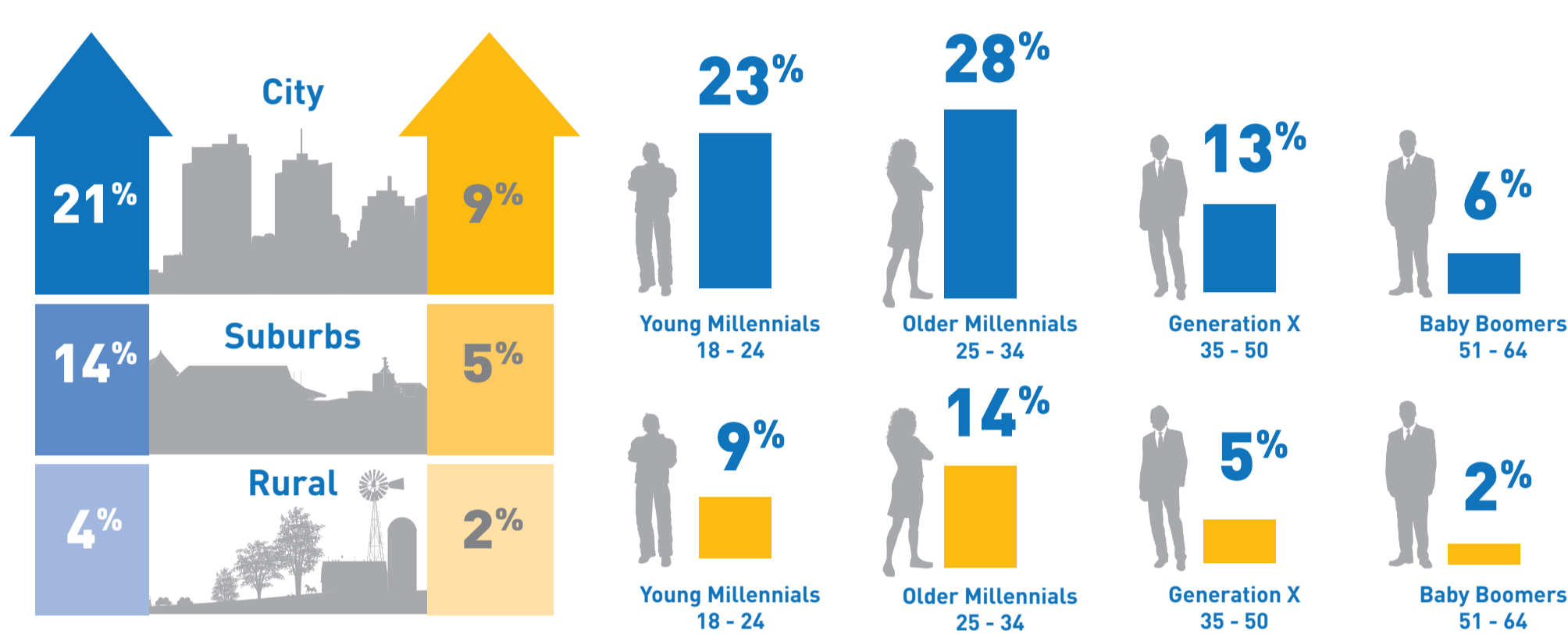
Awareness of Ride Sharing & Car Sharing is strong but usage is low



Usage is driven by Millennials and those living in urban areas

Usage by Generation

■ Ride Sharing ■ Car Sharing



Vehicle ownership is considered safer, more reliable, more personalized, convenient and practical than ride- or car-sharing services

Shared Services are Not Perceived to Rival the Benefits of Vehicle Ownership



4 out of 5 choose car ownership over ride sharing

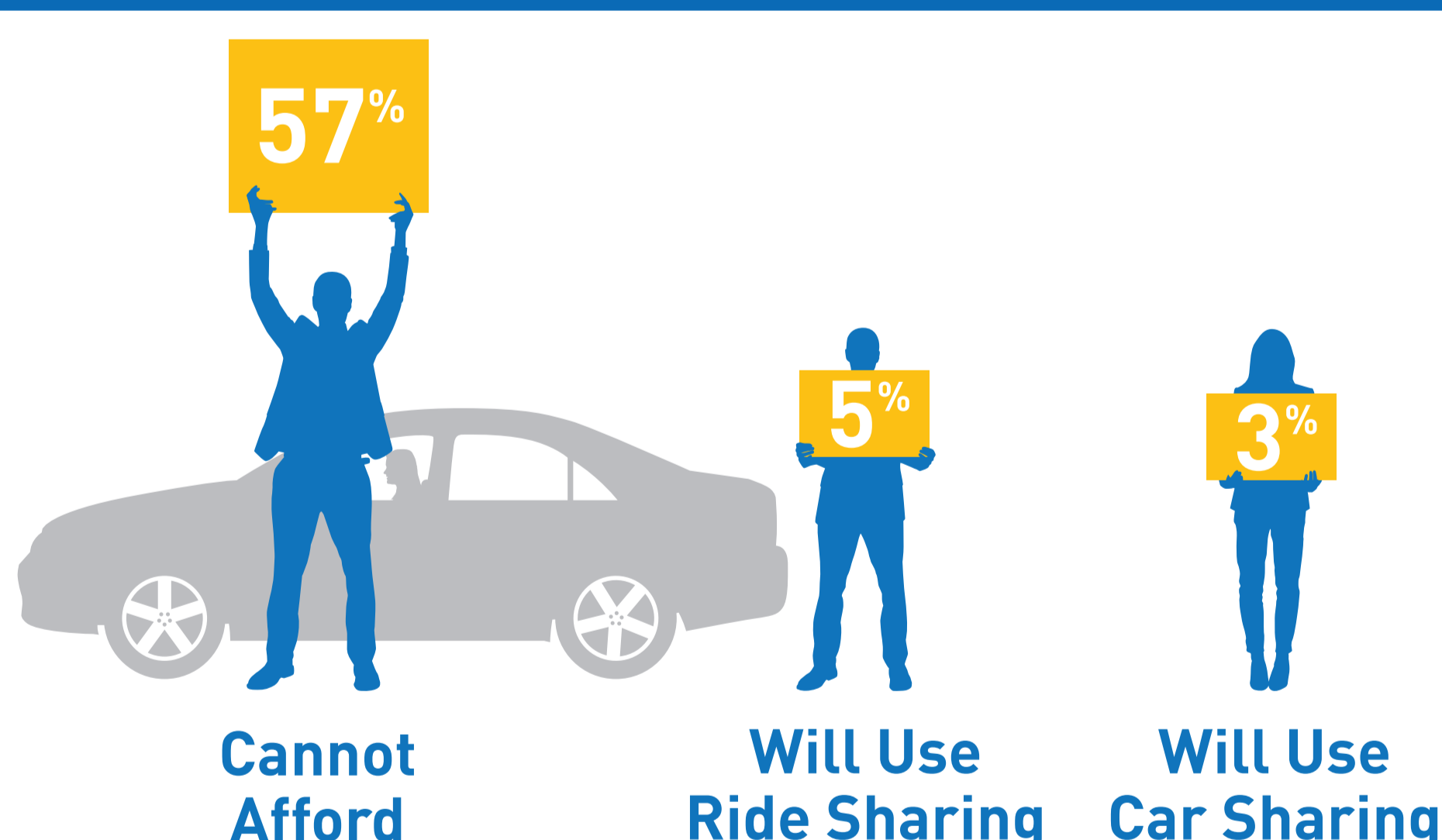


3 out of 4 choose car ownership over car sharing

When Describing:

Reliability, Safety, Idealness, Tailored to Needs, Convenience, Practicality

For those who do not currently own/lease a vehicle, the primary reason is affordability, not that they prefer ride sharing or car sharing



Car sharing services are viewed as substitutes for taxis and rental cars. In fact, future purchase intent is stronger among users of these services.

Planning to Purchase or Lease Within Two Years

