




1869 2019
CELEBRATING 150 YEARS

Richard Vaughan

Autonomous

Connected

Electrified

Shared

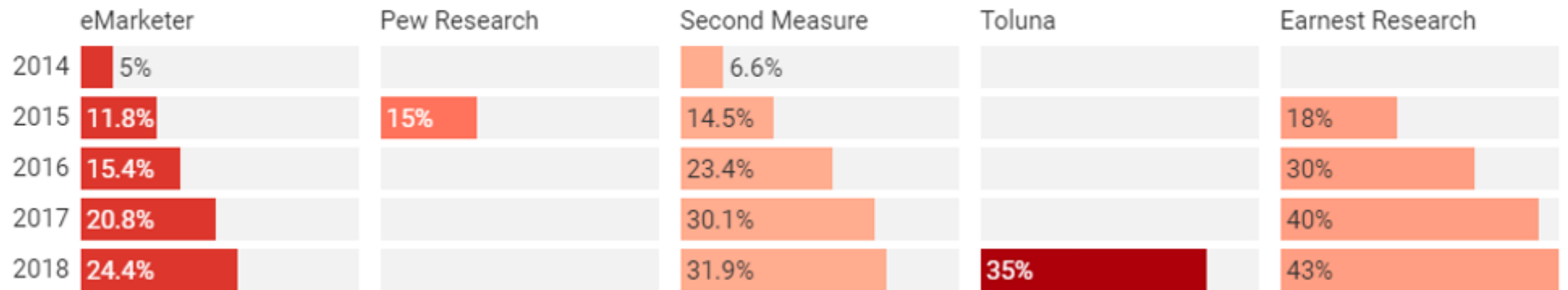
The Future of the Mobility Industry

In December 2015, a Pew Survey found that while two-thirds of American adults had heard of ride-hailing apps, just 15 percent of the population had used ever used one.

In 2018, anywhere from 24 percent to 43 percent of the population has used a ride-hailing service.

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Share of Americans who've used ride-hailing apps



Source: The firms above



The Pace of Change is Increasing

In the span of about 7 years, app-based ride-hailing has gone from non-existent to ubiquitous in major metro areas.

In 2017 15% of all vehicle trips taken within San Francisco were in an Uber Car.

Source: Union of Concerned Scientists



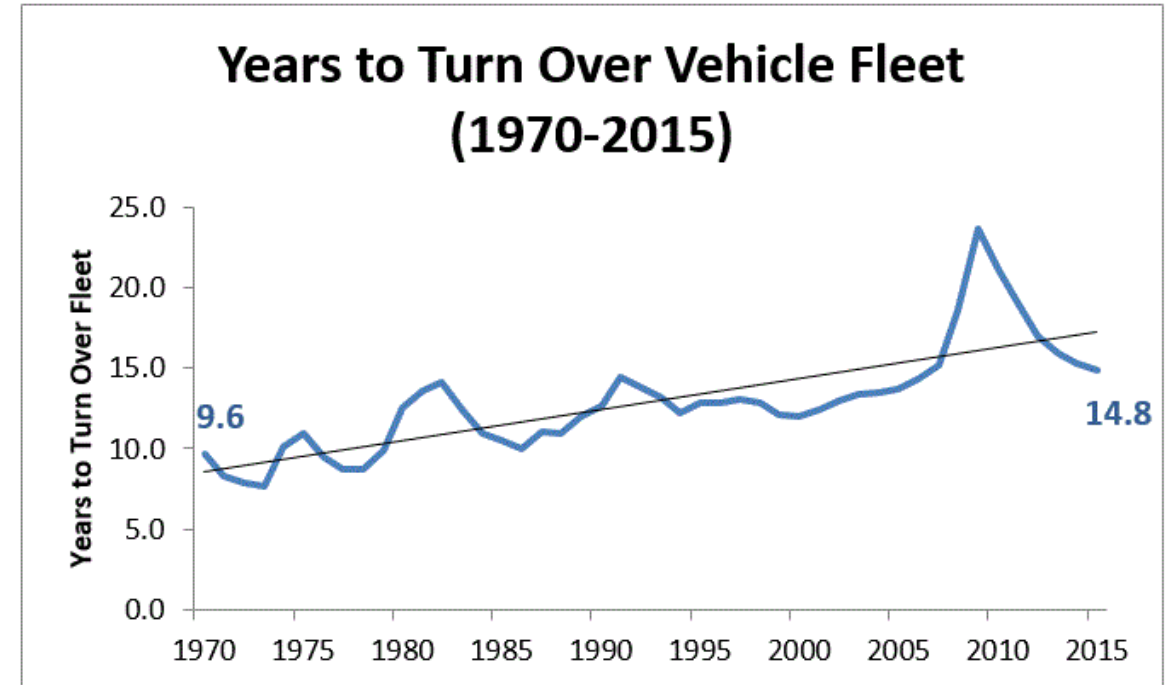
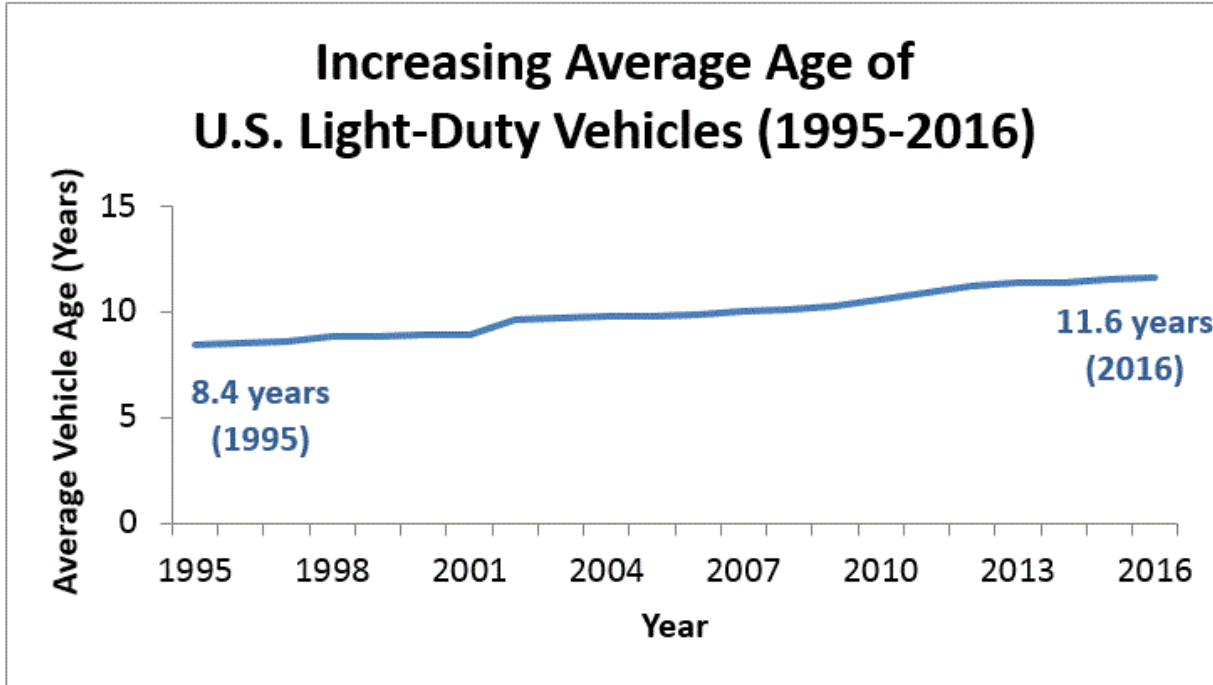
4.25 Billion Rides in 2017 (Globally)

Source; Forbes Jan 16, 2018

Growth in new usage models and new business models.

Ride Sharing / Mobility Services are the Gateway to Consumer acceptance of Autonomous Vehicles and

The average age of US cars is 11.6 years and the fleet turns over at 14.8 years.



This means that most human-driven cars sold in 2020 will still be on the roads in 2031. If Autonomous cars became 20% of the market in 2025, we will still have human driven cars on the road in 2037 and beyond.

Source: Transportation Energy Data Book, Oak Ridge National Laboratory

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