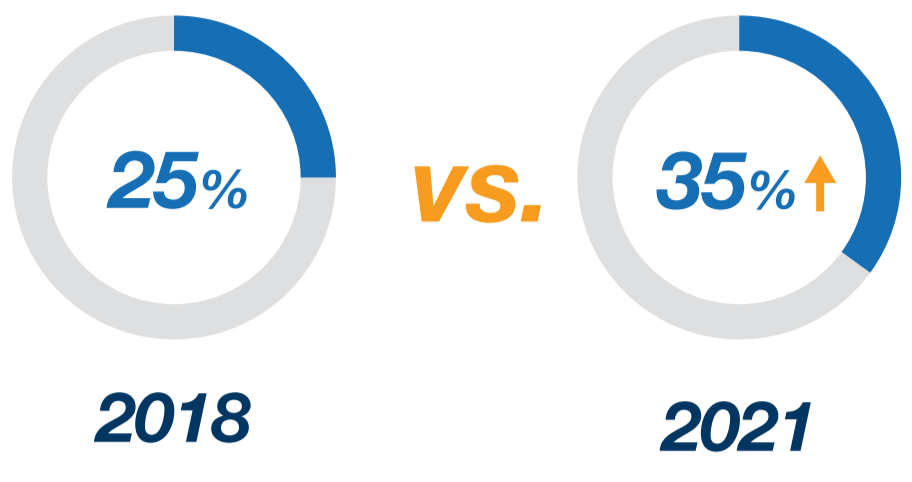


EVOLUTION OF MOBILITY

Back in 2018, we saw signs that a shift away from traditional vehicle ownership to alternative ownership might be emerging. Fast-forward to 2021 and a worldwide pandemic, traditional ownership holds steady. And while the way we get around is not changing at least for now, the vehicles we drive are becoming more complex as demand for connected car technology and automated features is growing.

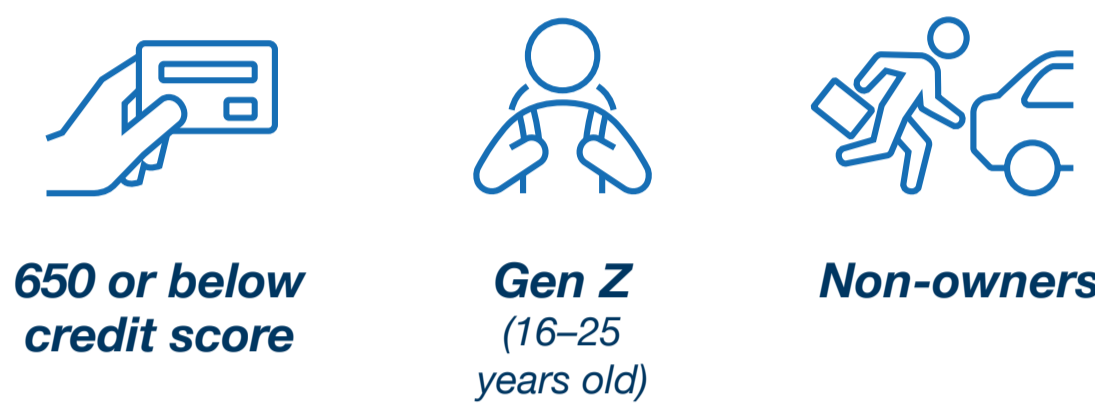
TRADITIONAL OWNERSHIP

% OF CONSUMERS WHO PLAN TO INCREASE THE NUMBER OF VEHICLES THEY OWN IN THE NEXT 5 YEARS



Ownership is viewed by far as the most affordable, practical and convenient transportation solution

% WHO PLAN TO INCREASE NUMBER OF VEHICLES OWNED IN THE NEXT 5 YEARS IS HIGHEST AMONG



46% OF CONSUMERS CHANGED THEIR TRANSPORTATION HABITS DUE TO COVID-19

Urban areas were the most impacted as consumers began to rely less on public transportation to get around and more on personal vehicles



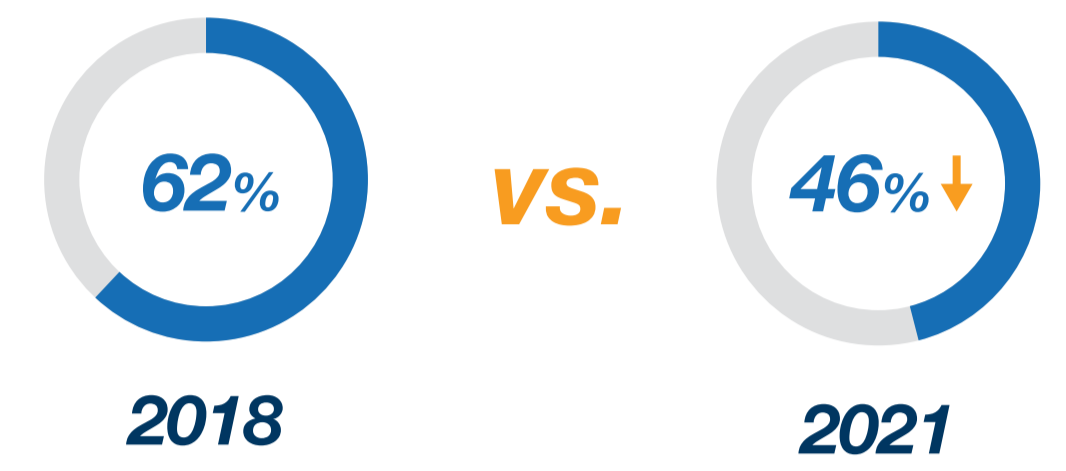
% OF CONSUMERS WHO SAY THEY LIKE TO OWN VEHICLES IS GROWING



AS GEN Z MATURES, THEY VIEW OWNERSHIP AS MORE OF A NECESSITY

% who say having transportation is necessary, but owning a vehicle is not

% of Gen Z who agree



ALTERNATIVE OWNERSHIP

COVID REWOUND THE CLOCK ON SHARED MOBILITY

Past 6-month usage down versus 2018 for public transportation, taxis and rental cars

Car subscription was the only shared mobility service to see an increase in past 6 months usage vs. 2018, growing from 4% to 6%

Increase in usage primarily among urbanites



AVAILABILITY AND AWARENESS OF CAR SUBSCRIPTION IS IMPROVING

% who say it's not available in their area has dropped



Awareness of car subscription is growing



TOP BARRIERS

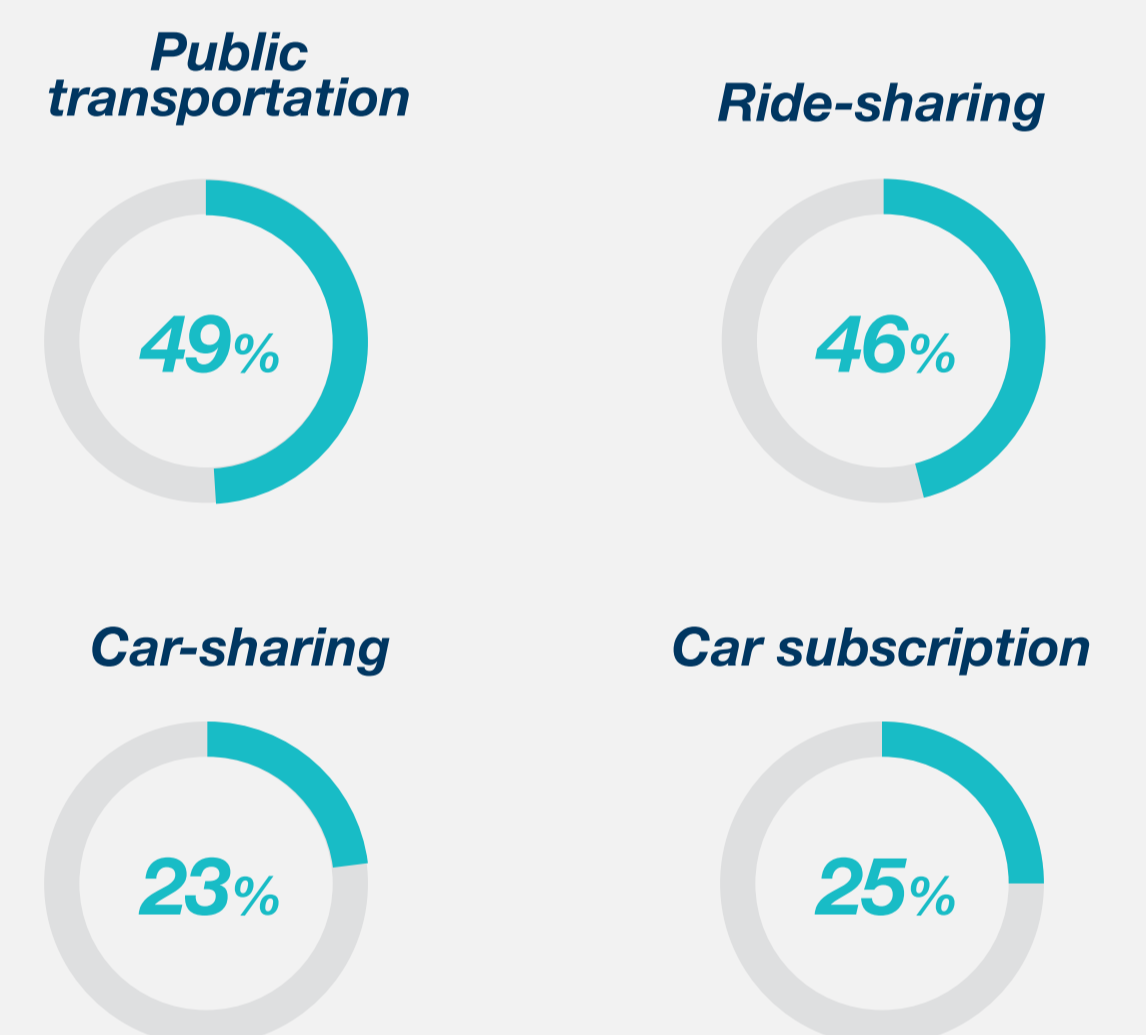
Ride-sharing
I prefer to drive myself

Car-sharing
I like riding/driving in my own vehicle

Car subscription
It's too expensive

ALTERNATIVE OWNERSHIP AND SHARED MOBILITY ARE STILL IMPORTANT PLAYERS IN THE TRANSPORTATION LANDSCAPE

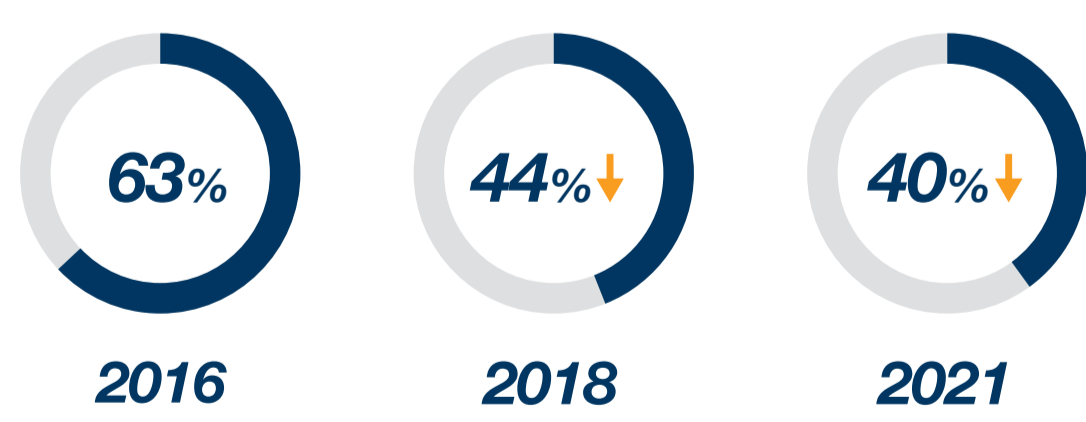
% who plan to use post-COVID



EMERGING TECHNOLOGY

WHILE CONSUMERS ARE STILL WARY ABOUT ROADWAYS BEING COMPLETELY AUTONOMOUS, DEMAND FOR AUTONOMOUS FEATURES IS GROWING

% who agree that roadways would be safer if vehicles were fully autonomous continues to decline



31% OF CONSUMERS OWN VEHICLES WITH AUTONOMOUS FEATURES

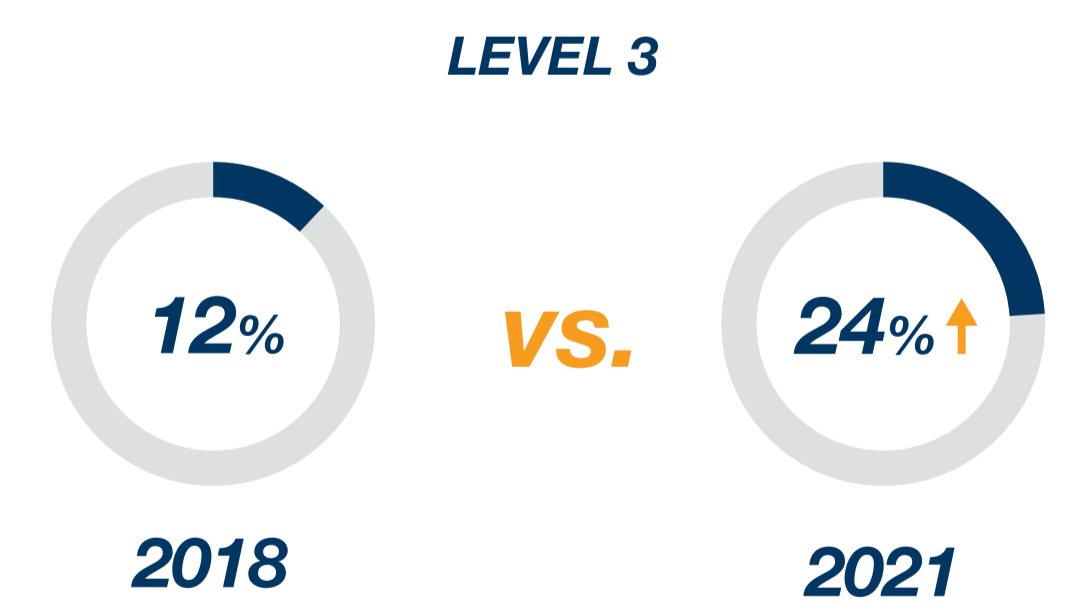
Up from 22% in 2018

Top autonomous features consumers want in their next vehicle: collision avoidance system & adaptive cruise control

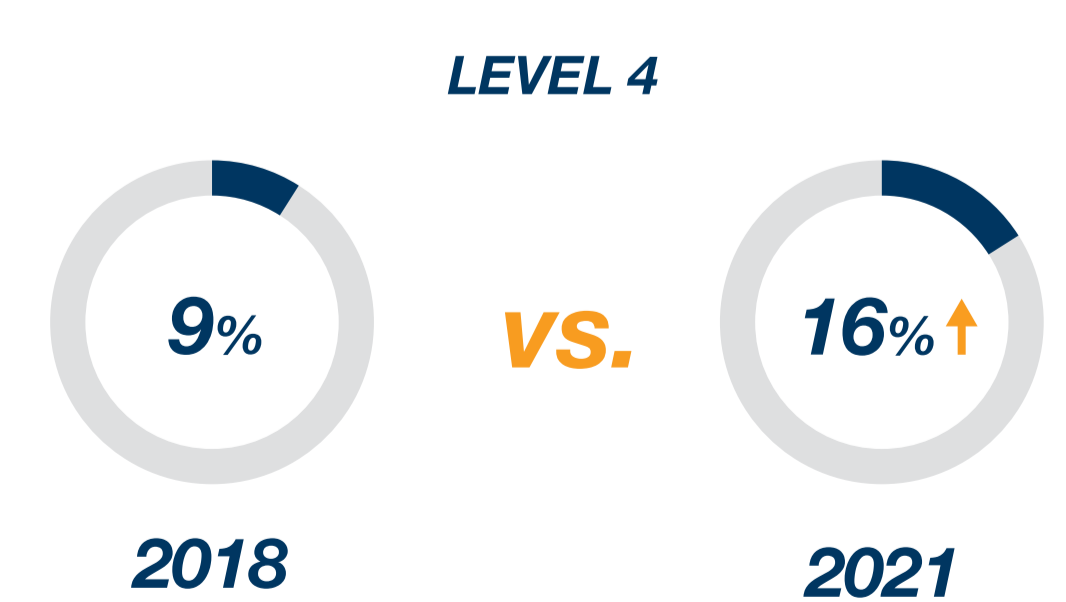


CONSUMERS BECOMING INCREASINGLY RECEPTIVE TO LEVEL 3 & 4 VEHICLES

% who would buy the moment Level 3 or Level 4 technology becomes available



Level 3 = Vehicle can drive in the city or on highways but requires a human for unmarked roadways or congested areas



Level 4 = Vehicle can operate all aspects of driving; humans can still drive if they want to

ABOUT THE STUDY

Cox Automotive's Evolution of Mobility Study explores the changing mobility landscape by monitoring trends in vehicle ownership, alternative ownership, autonomous vehicles and emerging car technology. In May 2021, more than 1,000 consumers ages 12 and over from across the U.S. weighed in on these topics.