2015 Emerging Car Care Trends

The NPD Group

August 2015
# NPD Credentials

<table>
<thead>
<tr>
<th>Founded</th>
<th>1966</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
<td>1300+ Worldwide</td>
</tr>
<tr>
<td>Data Assets and Solutions</td>
<td></td>
</tr>
<tr>
<td>Point-of-sale (scanner) information from more than 1,200 retailers representing approximately 165,000 stores worldwide</td>
<td></td>
</tr>
<tr>
<td>More than 12 million consumer interviews conducted annually</td>
<td></td>
</tr>
<tr>
<td>Longitudinal panel of more than 1 million consumers tracks buying behavior at the market basket-level, based on receipts for both online and brick-and-mortar retail purchases</td>
<td></td>
</tr>
<tr>
<td>Custom research and analytics &amp; modeling focused on identifying drivers of sales and market share. Specific solutions for Marketing Mix, Forecasting, Opportunity Identification, Category Management, Pricing Strategy, and more</td>
<td></td>
</tr>
<tr>
<td>Industry Expertise</td>
<td></td>
</tr>
<tr>
<td>Apparel, Appliances, Automotive, Beauty, Consumer Electronics, Diamonds, E-commerce, Entertainment, Fashion Accessories, Food Consumption, Foodservice, Footwear, Home, Mobile, Office Supplies, Retail, Sports, Technology, Toys, Video Games, and Watches/Jewelry</td>
<td></td>
</tr>
<tr>
<td>Clients</td>
<td></td>
</tr>
<tr>
<td>More than 2,000 of the world’s leading brands and retailers</td>
<td></td>
</tr>
<tr>
<td>Operations</td>
<td></td>
</tr>
<tr>
<td>In 20 countries in the Americas, Europe, and Asia-Pacific</td>
<td></td>
</tr>
</tbody>
</table>
2015 Emerging Car Care Trends

- Consumer are on the Rebound
- New Cars are Creating New Opportunities
- Aging Cars are Still Driving Sales
- Consumers Value Premium
- Innovation Leads to Growth
- The Evolving Installed (DIFM) Market Landscape
Consumers are on the Rebound!
$1 Trillion Consumer Spend

723 Retailers

122,000 Outlets
## Industry Trends
### Total U.S. Market (all channels)
#### 12ME March ‘15

<table>
<thead>
<tr>
<th>Category</th>
<th>% Change</th>
<th>Dollars (proj.)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Toys</strong></td>
<td>+8.2%</td>
<td>$24.5B</td>
</tr>
<tr>
<td><strong>Beauty</strong></td>
<td>+5.6%</td>
<td>$11.3B</td>
</tr>
<tr>
<td><strong>Video Games</strong></td>
<td>+5.4%</td>
<td>$22.6B</td>
</tr>
<tr>
<td><strong>Footwear</strong></td>
<td>+3.9%</td>
<td>$63.3B</td>
</tr>
<tr>
<td><strong>Accessories</strong></td>
<td>+2.8%</td>
<td>$53.1B</td>
</tr>
<tr>
<td><strong>Home Textiles</strong></td>
<td>+2.8%</td>
<td>$21.8B</td>
</tr>
<tr>
<td><strong>Auto</strong></td>
<td>+2.6%</td>
<td>$14.2B</td>
</tr>
<tr>
<td><strong>Apparel</strong></td>
<td>+2.4%</td>
<td>$210.1B</td>
</tr>
<tr>
<td><strong>Office Supplies</strong></td>
<td>+2.2%</td>
<td>$23.8B</td>
</tr>
<tr>
<td><strong>Small Appliances</strong></td>
<td>+2.0%</td>
<td>$21.4B</td>
</tr>
<tr>
<td><strong>Housewares</strong></td>
<td>+1.1%</td>
<td>$210.7B</td>
</tr>
<tr>
<td><strong>Consumer Electronics</strong></td>
<td>-5.4%</td>
<td>$106.6B</td>
</tr>
<tr>
<td><strong>Toys</strong></td>
<td>+8.2%</td>
<td>$24.5B</td>
</tr>
<tr>
<td><strong>Household Products</strong></td>
<td>+1.1%</td>
<td>$210.7B</td>
</tr>
<tr>
<td><strong>Footwear</strong></td>
<td>+3.9%</td>
<td>$63.3B</td>
</tr>
<tr>
<td><strong>Office Supplies</strong></td>
<td>+2.2%</td>
<td>$23.8B</td>
</tr>
<tr>
<td><strong>Commercial Food Service</strong></td>
<td>+3.0%</td>
<td>$437.0B</td>
</tr>
</tbody>
</table>

### Market Totals

**TOTAL:** $1,782.2B (+3.5%)

**w/o Commercial Food Service:** $1,345.2B (+3.6%)

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Source: The NPD Group/Consumer Tracking Service,
*Nielsen Scantrack, 52 weeks ending March 28,’15

*Footnotes on Slide 6

Last updated: May 2015
Do-It-Yourself market

Almost 2 out of 5 transactions made in the automotive aftermarket were for DIY product purchases.

Total DIY Industry
% Transactions

40% 37%
YTD June 2014 YTD June 2015

The NPD Group/Car Care Track
YTD June 2015 /% Transactions/n = 38,498 & 34,035
Three Factors are Highly Correlated to Automotive Product Sales Volume

Forecast Model Drivers

- Miles Driven
- Retail Price (NPD’s Retail Tracking Service)
- CPI New and Used Vehicles
May miles driven set a new record and is now 42 billion miles over the pre-recession high

Source: US Dept. of Transportation/ Federal Highway Administration

- Culture Shift
- Workforce Trends
- Generational Change
The last time real gasoline price was sustained at or below today’s level miles driven was growing at 4%
In spite of a 3.7% increase in gallon demand, consumers have spent $64 billion less at the pump.

<table>
<thead>
<tr>
<th>Gasoline Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>$241</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Billions</th>
<th>1st 26 Weeks 2014</th>
<th>1st 26 Weeks 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>$241</td>
<td></td>
<td>$177</td>
</tr>
</tbody>
</table>

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Year to Date Weather

Weather had a big impact on sales Year to Date:

- 23 states had one of their 10 coldest February temperatures on record
- 12th warmest March in the Total US
- Wettest May in history for the Total US
- 2nd warmest June in the Total US
Year to date sales gains of more than 4% are exceeding expectations

Year to Date Jul 04 2015 Pct. Chg. Vs. Year Ago

Source: The NPD Group/Retail Tracking Service
New Cars are Creating New Opportunities
One-Quarter Plan to Purchase a Vehicle in 2015, Half of Those will be a Used Car

Might/Plan to purchase a new/used vehicle

Do not plan on purchasing a vehicle

Don't know

Source: The NPD Group/Consumer Outlook Survey
More than 38 Million New Cars have Hit the Road since January 2013

Automotive Sales Trends: 2004-2015

New Car Sales (% Chg. Vs. Year Ago)

Sources: Autocare Association IIR March 2015 Report
Newer car owners are more likely to buy appearance products…

0 to 3 year Old Vehicle Purchase Index

Source: The NPD Group/Car Care Track

* Index = \( \frac{0-3 \text{ years old vehicle transaction share}}{\text{all vehicle transaction share}} \) * 100
...Which is leading to gains in retail sales

Year to Date July 04 2015 Pct. Chg. Vs. Year Ago

<table>
<thead>
<tr>
<th>Category</th>
<th>Dollars</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand Total</td>
<td>4.1%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Appearance Accessories</td>
<td>5.9%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Appearance Chemicals</td>
<td>3.7%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Winter Merchandise, Towels/Rags and Other Wash/Detailing products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Protectants, Wax/Polish, Carpet and Fabric Care, Cleaners, Glass Care, Leather Care, Lens/Plastic Care, Tire/Wheel Care</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The NPD Group/Retail Tracking Service
Aging Cars are Still Driving Sales
Consumers today are purchasing cars that are already more than 10 years old

Age of Used Cars at Time of Purchase

Purchased Used Vehicle
- Past 3 Years
- More Than 3 Years Ago

Source: NPD Automotive “It’s New to Me” Topical Report
The majority of today's older car owners plan to keep for more than 4 years.

**Length of Intended Ownership**

<table>
<thead>
<tr>
<th>Age of Vehicle</th>
<th>0-3 years</th>
<th>4-7 years</th>
<th>8-10 years</th>
<th>11+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td>27%</td>
<td>21%</td>
<td>20%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>11%</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>30%</td>
<td>44%</td>
<td>31%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>32%</td>
<td>25%</td>
<td>42%</td>
<td>47%</td>
<td></td>
</tr>
</tbody>
</table>

Source: The NPD Group/Consumer Outlook Survey
And while almost half of older car owners want to replace within the next 3 years, most are considering another used car.

### 2015 Vehicle Purchase Intentions

<table>
<thead>
<tr>
<th>Age of Vehicle</th>
<th>Considering New Vehicle</th>
<th>Considering Used Vehicle</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-3 years</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td>4-7 years</td>
<td>17%</td>
<td>8%</td>
</tr>
<tr>
<td>8-10 years</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>11-14 years</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>15+</td>
<td>8%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: The NPD Group/Consumer Outlook Survey
Older car owners exhibit desirable maintenance behaviors

Select 2015 Maintenance Behaviors by Age of Vehicle

Change my air filter
- 0-3 years: 7%
- 11+ years: 23%

Replace fuel filter
- 0-3 years: 7%
- 11+ years: 14%

Start using a fuel additive
- 0-3 years: 7%
- 11+ years: 14%

Change spark plugs
- 0-3 years: 6%
- 11+ years: 11%

Start using a more premium oil
- 0-3 years: 5%
- 11+ years: 10%

Start changing oil more often
- 0-3 years: 5%
- 11+ years: 9%

Source: The NPD Group/Consumer Outlook Survey
Older car owners are twice as likely to expect to spend more than $1,000

Expected 2015 Maintenance and Repair Spending

Source: The NPD Group/Consumer Outlook Survey
Drivers of aging vehicles have needs...

Top 14 aging related segments based upon YTD dollar gain
(Over $135 Million Gained YTD June vs. Year Ago)

<table>
<thead>
<tr>
<th>Driver Need</th>
<th>Top Performing Segments</th>
<th>YTD Dollar Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>My car won’t start!</td>
<td>• Automotive Batteries</td>
<td>+6.3%</td>
</tr>
<tr>
<td>I need this car to last!</td>
<td>• High Mileage Motor Oil</td>
<td>+10.1%</td>
</tr>
<tr>
<td>My lights aren’t working!</td>
<td>• Capsules/Bulbs</td>
<td>+10.6%</td>
</tr>
<tr>
<td></td>
<td>• Miniature Replacement Bulbs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Lens Restoration Kits</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Headlight Assemblies</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Tail Light Assemblies</td>
<td></td>
</tr>
<tr>
<td>I need a quick easy fix!</td>
<td>• Multisystem Additives</td>
<td>+7.1%</td>
</tr>
<tr>
<td></td>
<td>• Oil Stabilizers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Emissions Control</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Engine Stop leak</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• AC Charging Kits</td>
<td></td>
</tr>
<tr>
<td>I’m doing repair and maintenance!</td>
<td>• Brake Cleaner</td>
<td>+8.9%</td>
</tr>
<tr>
<td></td>
<td>• Power Steering Fluid</td>
<td></td>
</tr>
</tbody>
</table>
Consumers Value Premium
Consumers today define value as more than just price

Automotive Product Purchase Drivers

<table>
<thead>
<tr>
<th>Feature</th>
<th>Bottom 2 Box Importance</th>
<th>Top 2 Box Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is reasonably priced</td>
<td>3%</td>
<td>71%</td>
</tr>
<tr>
<td>Is made with quality materials</td>
<td>3%</td>
<td>66%</td>
</tr>
<tr>
<td>Increases gas mileage in vehicle</td>
<td>5%</td>
<td>64%</td>
</tr>
<tr>
<td>Increases engine performance</td>
<td>5%</td>
<td>58%</td>
</tr>
<tr>
<td>Easy to install or use</td>
<td>6%</td>
<td>55%</td>
</tr>
<tr>
<td>Cleans the engine</td>
<td>6%</td>
<td>53%</td>
</tr>
<tr>
<td>Is better for the air/environment</td>
<td>12%</td>
<td>42%</td>
</tr>
<tr>
<td>Made with enviro-friendly materials</td>
<td>16%</td>
<td>33%</td>
</tr>
<tr>
<td>Enhances the appearance of the vehicle</td>
<td>17%</td>
<td>33%</td>
</tr>
<tr>
<td>Made with recyclable materials</td>
<td>23%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Source: The NPD Group/Consumer Outlook Survey
The quality oriented consumer is prevalent in automotive categories

Price vs. Quality

- Automotive parts: 27% purchase highest quality, 6% least expensive
- Automotive maintenance products: 19% highest quality, 9% least expensive
- Fuel/oil additives: 19% highest quality, 9% least expensive
- Appearance and accessories: 15% highest quality, 11% least expensive

*Base: Those who purchase the category

Source: The NPD Group/Consumer Outlook Survey
Consumer affinity for premium items is broad based

Source: The NPD Group
Consumers are opting for premium value

Top 8 premium differentiated segments based upon YTD dollar gain
(Over $96 Million Gained YTD June vs. Year Ago)

<table>
<thead>
<tr>
<th>Premium Segment</th>
<th>YTD Dollar Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Premium Beam Wiper Blades</td>
<td></td>
</tr>
<tr>
<td>• Full Synthetic Motor Oil</td>
<td></td>
</tr>
<tr>
<td>• High Level Premium Spark Plugs</td>
<td></td>
</tr>
<tr>
<td>• Hybrid Wiper Blades</td>
<td></td>
</tr>
<tr>
<td>• Premium/Performance Oil Filters</td>
<td></td>
</tr>
<tr>
<td>• Full Synthetic HD Oil</td>
<td>+16.4%</td>
</tr>
<tr>
<td>• Performance/Extended Life Air Filters</td>
<td></td>
</tr>
<tr>
<td>• HID Capsules and Bulbs</td>
<td></td>
</tr>
</tbody>
</table>
Innovation Leads to Growth
Vent Clip Air Fresheners
Three segments provide examples where innovative products drive accelerated growth.

Air Fresheners Two Year Dollar Growth – June 2015

12 ME June 2015 vs 2013

- Total Air Fresheners: 8%
- Vent Clips: 25%

Source: the NPD Group/Retail Tracking Service

Source: NPD Automotive “It’s New to Me” Topical Report
Trim Care
Three segments provide examples where innovative products drive accelerated growth

Appearance Chemicals Two Year Dollar Growth – June 2015

12 ME June 2015 vs 2013

- 8%
- 32%

Total Appearance Chemicals
Trim care

Source: the NPD Group/Retail Tracking Service

Source: NPD Automotive “It’s New to Me” Topical Report
Other Coatings
Three segments provide examples where innovative products drive accelerated growth

Paint and Coatings Two Year Dollar Growth – June 2015

12 ME June 2015 vs 2013

- Total Paint/Coatings: 7%
- Other Coatings: 173%

Source: NPD Group/Retail Tracking Service

Source: NPD Automotive “It’s New to Me” Topical Report
Aftermarket Growth Trends

- Innovation
- Premium Value
- Future Growth

Aging Vehicles:
- High Mileage Oil
- Automotive Batteries
- Capsules/Bulbs
- AC Charging Kits

Future Growth:
- Beam Wiper Blades
- Hybrid Wiper Blades
- Synthetic Motor Oil
- High Level Premium Spark Plugs
- Premium/High Mileage Filters
The Evolving Installed Market Landscape
Do-It-For-Me Market

As of June 2015, over 3 out of 5 transactions made in the automotive aftermarket were for DIFM services.

Total DIFM Industry % Transactions

63%

The top 6 services account for 50% of transactions:

Oil Change
Tire Rotating/Balancing
Brake Service
Car Wash
Air/Cabin Filter Replacement
Tire Replacement

The NPD Group/Car Care Track
Dealerships lead the way in outlet share
Service Transaction Share 12 ME Jun 2015

- Dealerships: 27%
- Quick Lubes: 15%
- Repair Shops: 14%
- Tire Shops: 15%

Source: NPD Group / Car Care Track
Dealer share is skewed to newer vehicles

Service Transaction Share 12 ME June 2015

- Dealerships
- Repair Shops

0-3 years old: Dealerships 60%, Repair Shops 10%
4-7 years old: Dealerships 40%, Repair Shops 20%
8-11 years old: Dealerships 20%, Repair Shops 10%
12-15 years old: Dealerships 10%, Repair Shops 5%
16+ years old: Dealerships 5%, Repair Shops 5%
Oil Changes are the most common type of service

Service Transaction Share – 12 ME June 2015

All Service Transactions – 12 ME June 2015

- Oil Change: 24%
- Tire Rotating or Balancing: 7%
- Brake Service: 5%
- Car Wash/Car Detailing: 5%
- Air Filter/Cabin Filter Replacement: 5%
- Tire Replacement/New Tires: 5%
- Air Conditioning or Heating Service: 4%
- Wiper Blade/Refill Installation: 4%
- Veh Inspection/Emission Test: 4%
- Steering and Suspension/Tire Align: 4%
- Tire Repair: 3%
- Battery Replacement/New Battery: 3%
- Cooling System Service: 3%
- Electrical/Ignition Service: 3%
- Engine Repair: 3%

Source: NPD Group / Car Care Track
Free oil changes most common at Dealerships

DIFM Outlet Quart Share by Free / Paid Oil Change – 12 ME June 2015

- Total PCMO DIFM: 13
- Dealerships: 87
  - Free Oil Change: 29
  - Paid Oil Change: 71
- Quick Lubes: 98
  - Free Oil Change: 2
  - Paid Oil Change: 96
- Repair Shops: 95
  - Free Oil Change: 5
- Tire Shops: 96
  - Free Oil Change: 4

Source: NPD Group / Car Care Track
Dealerships lead the way in Oil Change Quart Share

Oil Change Quart Shares – 12 ME Jun 2015

Dealerships: 39%
Quick Lubes: 20%
Repair Shops: 12%
Tire Shops: 10%

Source: NPD Group / Car Care Track
Tire Shops are not getting their “fair share” of oil changes

Service Share Transaction Index – 12 ME June 2015

Oil Change

Source: NPD Group / Car Care Track
Repair shops may have some upside in the tire business
Service Share Transaction Index – 12 ME June 2015

Source: NPD Group / Car Care Track
Repair shops must defend leadership in the brake service category

Service Share Transaction Index – 12 ME June 2015

Brake Service

Dealerships | Quick Lubes | Repair Shops | Tire Shops

Source: NPD Group / Car Care Track
## Repair Shops Dominate Most Major Repair Oriented Services

Leading Service Share Transaction Indices – 12 ME June 2015

<table>
<thead>
<tr>
<th>Dealerships</th>
<th>Quicklubes</th>
<th>Repair shops</th>
<th>Tire shops</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tire rotating</td>
<td>Air Filter</td>
<td>Brakes</td>
<td>New Tires</td>
</tr>
<tr>
<td>Oil Change</td>
<td>Oil Change</td>
<td>Engine Repair</td>
<td>Tire Repair</td>
</tr>
<tr>
<td>Air Filter</td>
<td>Wiper Blades</td>
<td>Electrical/Ignition</td>
<td>Rotating/balancing</td>
</tr>
<tr>
<td>Car Wash</td>
<td></td>
<td>Inspection</td>
<td>Steering/Suspension/Alignment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cooling System</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>AC/Heating</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Steering/Suspension/Alignment</td>
<td></td>
</tr>
</tbody>
</table>

Source: The NPD Group/Car Care Track
Strategies for Growth
Strategies for growth in 2015

1. Close the oil change opportunity gap
Respondents who went to Dealerships for their oil change service, tend to be very loyal to that outlet.

Channel Loyalty - Buyer Share – 12ME June 2015

I always go to this outlet
I usually go to this outlet
I usually go to another outlet

<table>
<thead>
<tr>
<th>Outlet Type</th>
<th>Always Go</th>
<th>Usually Go</th>
<th>Another Outlet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>62%</td>
<td>21%</td>
<td>7%</td>
</tr>
<tr>
<td>Dealerships</td>
<td>76%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Quick Lubes</td>
<td>49%</td>
<td>32%</td>
<td>8%</td>
</tr>
<tr>
<td>Repair Shops</td>
<td>60%</td>
<td>21%</td>
<td>6%</td>
</tr>
<tr>
<td>Tire Shops</td>
<td>52%</td>
<td>28%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: NPD Group / Car Care Track
Consumers Offer Very Different Reasons for Selecting Their Oil Change Outlet

Reasons For Oil Change Channel Selection Indices

<table>
<thead>
<tr>
<th>Dealerships</th>
<th>Quick Lubes</th>
<th>Repair Shops</th>
<th>Tire Shops</th>
</tr>
</thead>
</table>
| • Warranty/Guarantee included  
• Maintain vehicle service history  
• Cleanliness | • Speed of service  
• Location  
• Coupons/Offers | • Recommended by someone I trust  
• Knowledge of employees  
• Feel like a valued customer  
• Friendliness of employees  
• Quality of service | • Coupons/Offers |

Source: The NPD Group/Car Care Track
Strategies for growth in 2015

1. Close the oil change opportunity gap
2. Defend your turf with aging vehicles
Targeting the Aging Vehicle Consumer

Vehicles 8 years old and over

Services
Transaction Index

- Fuel systems, automotive lighting, exhaust, engine repair

Reasons more likely to choose outlet

- Recommended by someone I trust, price, visited web site or used app to get info

Demographic Distinctives

- More likely to be under age 24, and moderate to lower income, just as likely to be female

The NPD Group/Retail Tracking Service
Strategies for growth in 2015

1. Close the oil change opportunity gap
2. Defend your turf with aging vehicles
3. Invest in the future by winning with Millennials
Millennial consumers typically do not prefer Dealerships

- Younger Millennials: 25%
- Older Millennials: 29%
- Non-Millennials: 40%

Quick Lubes
- Younger Millennials: 25%
- Older Millennials: 23%
- Non-Millennials: 17%

Repair Shops
- Younger Millennials: 20%
- Older Millennials: 18%
- Non-Millennials: 18%

Tire Shops
- Younger Millennials: 24%
- Older Millennials: 22%
- Non-Millennials: 17%

Source: NPD Car Care Track / 12MESep2013

= significantly greater than other age groups
Millennial consumers are more likely to have had most vehicle services performed

<table>
<thead>
<tr>
<th>Service</th>
<th>Younger Millennials*</th>
<th>Older Millennials</th>
<th>Non-Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oil Change</td>
<td>57%</td>
<td>63%</td>
<td>68%</td>
</tr>
<tr>
<td>Tire Rotating or Balancing</td>
<td>22%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Brake Service</td>
<td>24%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Air Filter/Cabin Filter Replacement</td>
<td>15%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Tire Replacement/New Tires</td>
<td>21%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Car Wash/Car Detailing</td>
<td>17%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Vehicle Inspection/Emission Test</td>
<td>14%</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Steering and Suspension/Tire Align</td>
<td>15%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Wiper Blade/Refill Installation</td>
<td>15%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Air Conditioning or Heating Service</td>
<td>16%</td>
<td>13%</td>
<td>6%</td>
</tr>
</tbody>
</table>

*Car Care Track data does not include 16-17 year old drivers

Source: NPD Car Care Track / 12ME-Sep2013
2015 Emerging Car Care Trends

- Consumer are on the Rebound!
- New Cars are Creating New Opportunities
- Aging Cars are Still Driving Sales
- Consumers Value Premium
- Innovation Leads to Growth
- Opportunities to Explore in the Evolving Installed Market Landscape
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