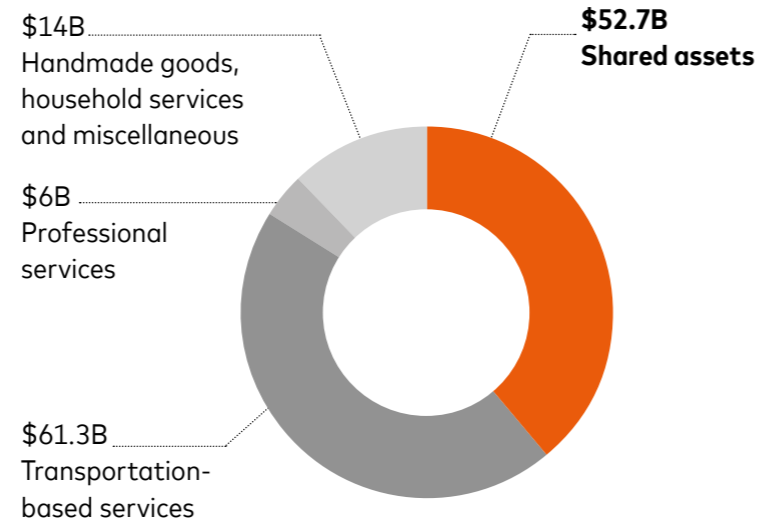


Monetising owned assets for additional income

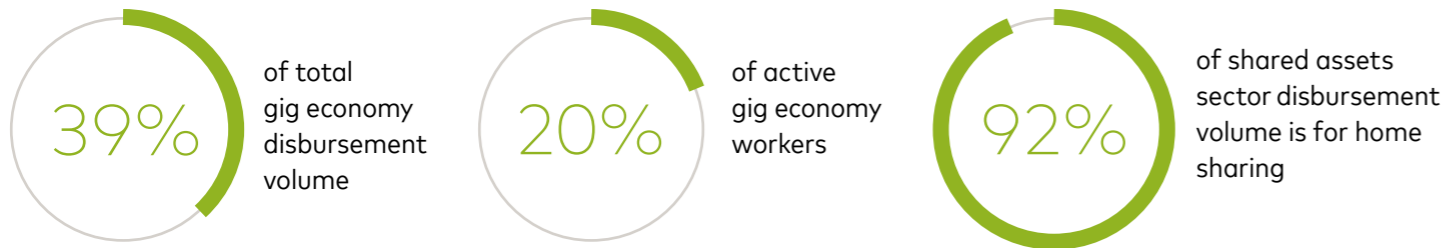
Gig platforms connect people and businesses to independent workers for on-demand services

\$134B disbursements in the gig economy globally in 2018



The shared assets sector provides

\$52.7B in disbursements to **8.6M** freelancers in the shared assets sector globally in 2018



Projections show demand will outstrip the supply of shared assets in the sector by 2023

133%
growth in disbursements

68%
growth in owned assets

Three prominent industries comprise the shared asset sector

92% of disbursement volume



Home sharing

On-demand platforms offering home-sharing and rental services

7% of disbursement volume



Car sharing

On-demand platforms offering car-sharing and rental services

1% of disbursement volume



Other shared assets

On-demand platforms offering equipment and alternative vehicle-sharing and rental services

Owners in the shared asset sectors have an appetite for real-time payments



Access to critical income stream



Upfront cost of providing gigs

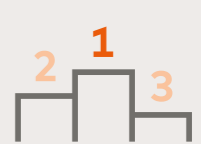
Real-time payouts are also important for shared asset platform providers



Grow and retain workforce of asset owners



Differentiate proposition



Remain competitive

All data points specific to gig workers connected by technology platforms to businesses and/or consumer customers, rather than aggregate freelancer population

Source: Mastercard and Kaiser Associates (2019) Gig Economy Industry Outlook and Needs Assessment