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Safety in 2024

Presenting:
Roger Kaiser
Hannah Nilles
Mike Akamine

December 6, 2023



Executive Summary

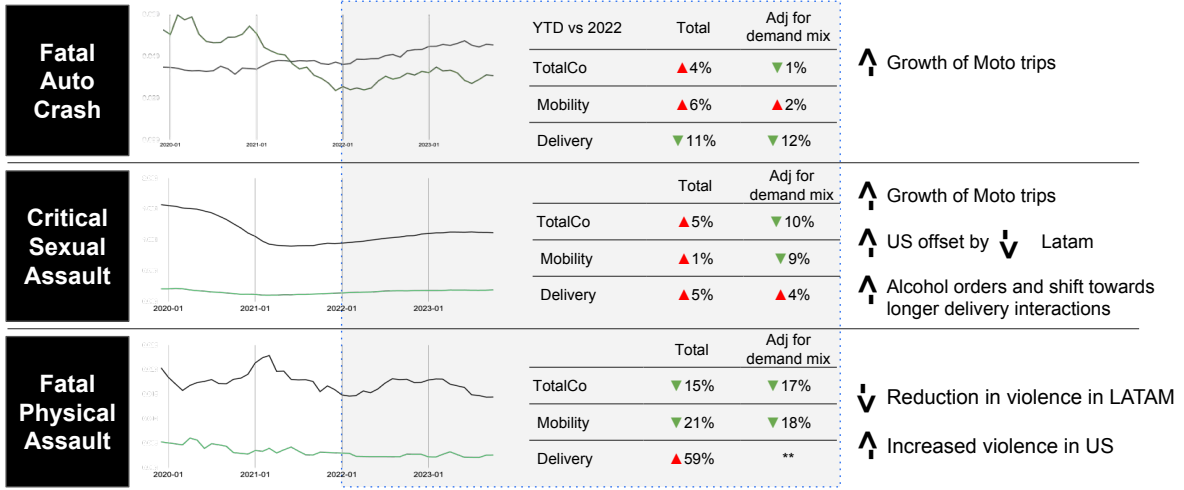
- We have launched a considerable amount of safety features and controls over the years that have put us in a **strong position in our industry**
- Topline safety **incident rates are increasing**, driven largely by a combination of demand mix shift and environmental factors
- External scrutiny is focused on **illegal work, earner safety and fairness, and user anonymity**
- Growth and changing landscapes have introduced new safety gaps in our systems
- Persistent risks remain, especially across **identity, road safety, and delivery**
- 'Ways-of-working' opportunities: **seeing around growth corners and improved monitoring of critical controls**
- 2024 Priorities: Identity, Road Safety, Growth Bets, Assurance

Incident Rate Trends

Low recall w/ no human review. 30k deactivations,
12k successful appeals

Regulators hold us to high bar; gigantic scale; controls in place and effective.

Global safety incident rates continue to rise, driven largely by mix shift changes and environmental factors.



YTD data through November 2023; Adjustment for demand mix shift includes country, time of day, vehicle modality (4w vs 2w), and alcohol deliveries.
 ** Mix shift not available due to low incident volume, resulting in low explained variance.

Mega-regional Deep Dive

Change in Critical Incidents per Million Trips, Segmented by Megaregion and Demand Mix Shift*

YTD vs 2022		Motor				Motor 2w				Motor 4w				PA				SA			
		YTD vs '22	Mix Shift	After Mix Shift	YTD Count	YTD vs '22	Mix Shift	After Mix Shift	YTD Count	YTD vs '22	Mix Shift	After Mix Shift	YTD Count	YTD vs '22	Mix Shift	After Mix Shift	YTD Count	YTD vs '22	Mix Shift	After Mix Shift	YTD Count
Mobility	Global	6%	4%	2%	278	46%	2%	44%	52	-4%	0%	-4%	226	-20%	-2%	-18%	85	1%	10%	-9%	6,742
	APAC	-23%	**	**	21	64%	**	**	11	-52%	**	**	10	143%	**	**	3	-8%	-5%	-3%	624
	EMEA	-3%	**	**	28	-47%	**	**	2	2%	**	**	26	-55%	**	**	2	-1%	-2%	2%	730
	LatAm	26%	14%	12%	104	50%	**	**	39	-5%	1%	-5%	65	-36%	**	**	47	3%	24%	-21%	3,239
	US&C	2%	-1%	3%	125					2%	-1%	3%	125	20%	**	**	33	3%	-1%	4%	2,149
Delivery	Global	-11%	2%	-12%	54	-1%	**	**	26	-18%	**	**	28	59%	**	**	8	5%	2%	3%	365
	APAC	-1%	**	**	11	5%	**	**	11	-100%	**	**	0	0%	**	**	0	27%	**	**	58
	EMEA	46%	**	**	7	20%	**	**	6	0%	**	**	1	-31%	**	**	2	-6%	2%	-8%	160
	LatAm	-26%	**	**	6	-25%	**	**	6	0%	**	**	0	-1%	**	**	1	29%	**	**	22
	US&C	-19%	**	**	30	9%	**	**	3	-21%	**	**	27	388%	**	**	5	16%	4%	12%	125

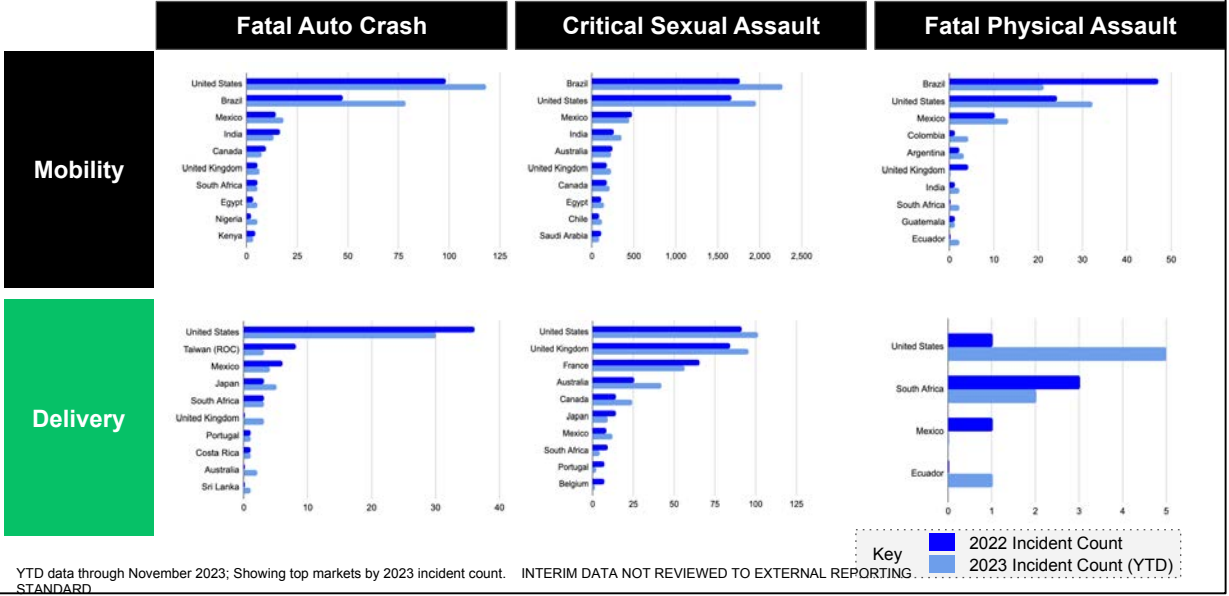
Data Key

YTD vs '22: Incident Rate Change, 2023 YTD vs 2022
 Mix Shift: Incident Rate Change due to Demand Mix Shift
 After Mix Shift: Incident Rate Change after controlling for Demand Mix Shift
 YTD Count: Total Incident Count, 2023 Year to Date

YTD data through October '23. Rounded to nearest value. Audited countries only. See [slide](#) for where audit is available. ** Mix shift not available due to low incident volume, resulting in low explained variance.

Top 10 Countries Driving Incident Volume by Incident Type + LoB

2022 vs 2023 YTD Incident Count

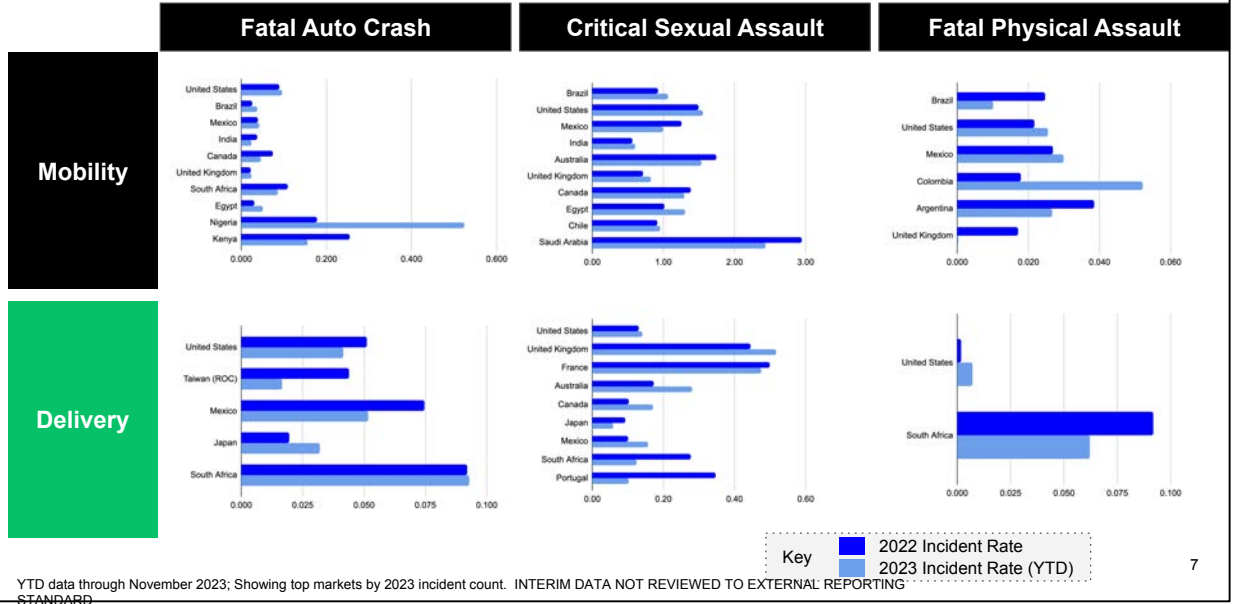


YTD data through November 2023; Showing top markets by 2023 incident count. INTERIM DATA NOT REVIEWED TO EXTERNAL REPORTING. STANDARD

Key 2022 Incident Count 2023 Incident Count (YTD)

Safety Incident Rate Per Country (highest incident volume countries)

2022 vs 2023 YTD Incident Rate

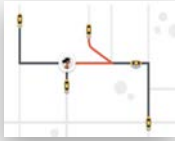


YTD data through November 2023; Showing top markets by 2023 incident count. INTERIM DATA NOT REVIEWED TO EXTERNAL REPORTING STANDARD

Safety Progress + Challenges

2023 wins

Sexual Assault Prevention

**S-RAD**

Prod metrics: 85.4% Serious SA/SM Incident coverage(Global); 7-9% IR reduction across regions measured by the holdout

LatAm SA/SM downward trend correlated with launch



Global SA/SM Education

Physical Assault Prevention

**SDM**

Prod metrics: 41% R2D Serious Incident coverage(Global); 15% prevented incidents in LatAm Active markets

LatAm PA downward trend correlated with launch

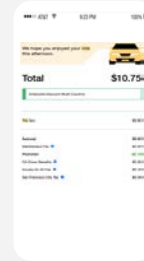
Dealing with intoxicated riders

Intoxicated riders
Tips on dealing with intoxicated riders



Global De-escalation Education

Crash Prevention

**Trip Risk Pricing**

XP results: 0.4% reduction in expected claims rate per trip



Global partnership with Global Alliance of NGOs for Road Safety

SA/SM - SRAD

- In 2023, S-RAD has expanded or is expanding to all regions, where we don't have legal/policy restrictions. By Nov, S-RAD is live in US, LATAM, ANZ and IND, covering 85.4% serious SA/SM incidents globally. Increased by 34.6p.p from 50.8% in last 12 months. In Dec, it will be expanded to Canada and MEA.
- In active regions, we observe 7-9% IR reduction, which is measured by 20% holdout group. Side note: ~9% in US&BR; ~7% in rest of LATAM; >15% in ANZ and IND(only two months of data for these two regions)

PA-R2D SIPC - SDM

- In 2023, SDM further expanded in LATAM. By Oct, SDM is covering 41% of global R2D SIPC. increased 8.2p.p by from 32.8% in last 12 months. 1)full roll out in ACAC cash markets; 2)launched XPs to non-cash markets in BR and MX; 3)full roll out in Chile
 - SDM Everywhere planned in H1 '24 will bring SDM to all applicable markets
- In Q4, SDM launched a new version of V4 model, which shows 11% performance improvement from shadow
- In active Latam markets, SDM is preventing 15% of R2D serious incidents(measured by 20% holdout)

For crash prevention:

In June, we launched an XP to replace the mileage based insurance cost allocation in the rider fare with a risk based one for US rides fares. As a result, we saw a shift in the mix of trips towards lower risk trips, resulting in a .4% reduction in expected claims rate. TRP is now live in the rider fare (both in the variable booking fee as well as RSP) for all US P2P trips

Consumers are concerned about...

- 1. Driver behavior**
Driver harassment is the #1 concern from riders
- 2. Dangerous driving**
~1 in 2 riders worried about Drivers driving dangerously

Earners are concerned about...


- 1. Rider behavior**
80% of Serious Physical Assault incidents reported against riders & 3rd parties
- 2. Getting into a crash**
1 in 2 earners worried about collision or accident (especially couriers)

External scrutiny about...

- 1. Illegal work**
- 2. Earner & Platform Safety**



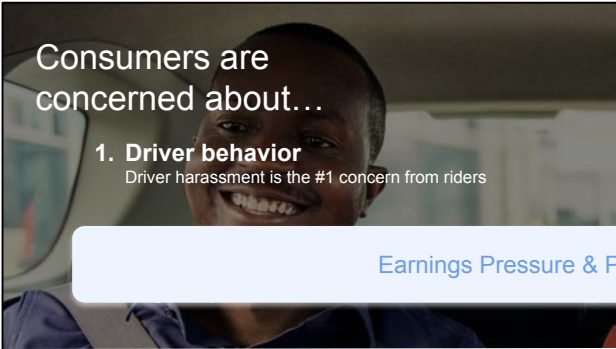

Our business has evolved...



Consumers are concerned about...

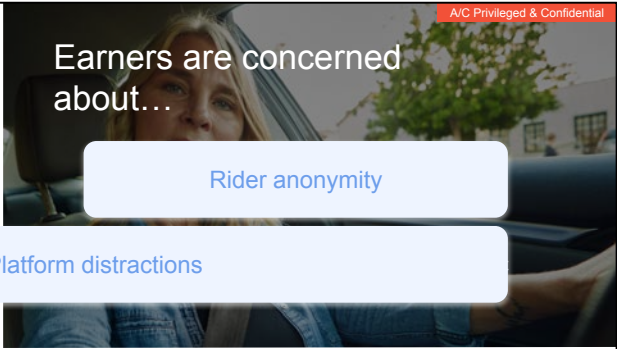
1. Driver behavior
Driver harassment is the #1 concern from riders

Earnings Pressure & Platform distractions



Earners are concerned about...

Rider anonymity



External scrutiny about...

Earners Identity

2. Earner & Platform Safety




Our business has evolved...

2-wheeler road safety

Alcohol deliveries

Illicit item transport



In our core businesses, more effort is required to get ahead of the headlines

Fake Accounts and Illegal Work

How migrants are gaming apps to get black market delivery jobs in NYC

Illegal Mopeds and Fake Names: Migrants Scrape By in Underground Economy

The Moped Crisis – An Analysis: The City Needs a Systemic Fix, Justice for Workers and Accountability by Tech Giants

NYC crackdown on illegal scooters calls attention to migrant struggles for work



From...
Reacting too late

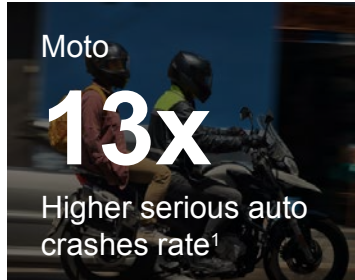
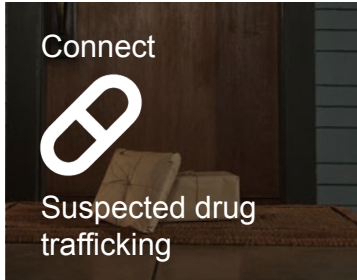
Driving Hour Limits

To... **A call to action is internally inspired.**

Assurance audit of DHL highlighted lack of coverage in multiple regions and LOBs and a new learning of DHL impact on account sharing

1 in a million happens every hour

As we grow in size and complexity we see increasing exposure in safety risk.



From... Launching with MVP safety controls.

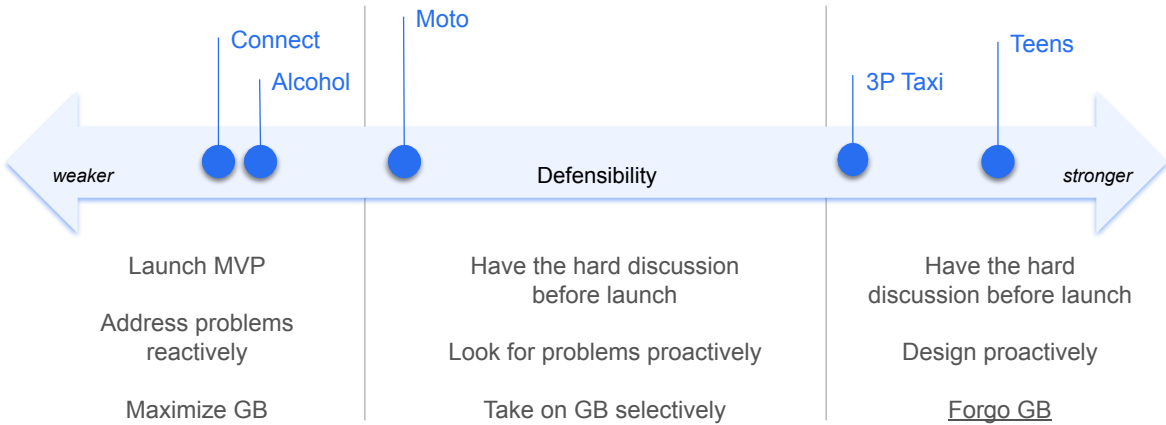
To... a higher safety standard for all products.

1. YTD Serious Auto Crash Rate per MM trips (Brazil only)

2. YTD Serious Interpersonal Conflict Rate per MM Trips (Markets with ID verification requirements - US, UK, CAN, AUS)

We should be intentional about the risks we take...

At launch, we were here:



As bets grow, we need to quickly scale maturity and defensibility

We think about risk relative to the problems space. When we have low tolerance: get advocates behind us, design embedded, hardest convos up front. When we have highest risk tolerance - we can ship MVP faster, address problems as they arise (learn risk distribution on the fly)

Takeaway: having the discussion is the point.

2024 Priorities

2024 Priority Areas

Into 2024, we are focused on 4 key priorities.

Identity

Improve Road Safety

Seed the Future, Safely

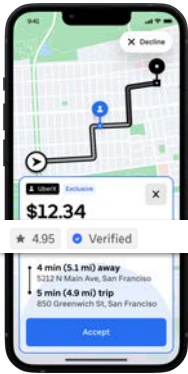
Raise the Bar on Quality and Assurance

[More here](#)

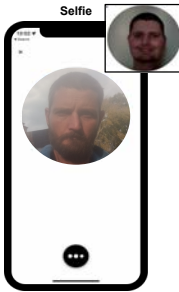
Personal Safety

Know our users and what happens on a trip

H1 2024



Rider verification, More Enforceable Rider ID Policy



X-Tech Improvements (active capture, ID/PP match, profile photo quality), Earner Profile Photo Freshness Policy

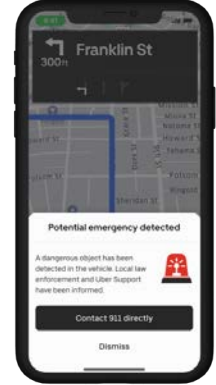


Scale video recording globally

Recording: 2025 and Beyond*



Live Streaming, Real-Time Emergency Alerts via ML, Rider Behavior Policy Enhancements



*Projects will require legal vetting

Improve Road Safety

Focus on crash reduction (4W) and preparedness (2W)

How we win

4W



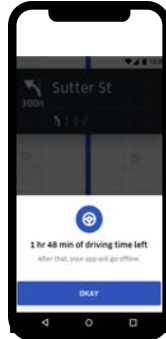
Driving scores + incentives

2W



Bike safety checklists +helmet verification

Cross Modal

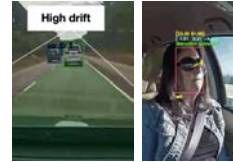


Driving Hour Limits

Future vision



Earner defensive driving education



New signals enables new safety features (eye gaze, lane drift)

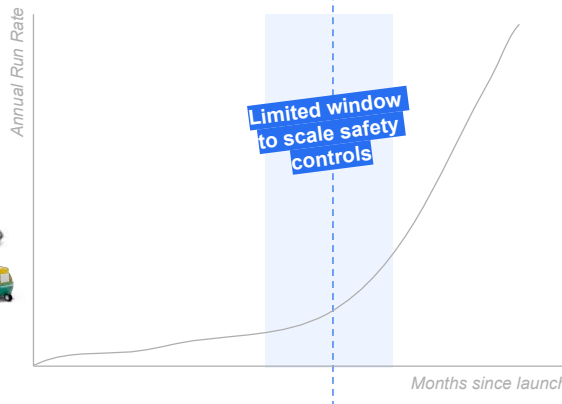
Seed the Future, safely

We're focused on designing with safety in mind across growth bets and scaling controls to mitigate critical risks.

Adoption curve of a growth bet

MVP Safety Controls

- Safety risk assessment
- Minimum safety controls required



Scaled Safety Controls

- Moto: SA/SM interventions + 2w road safety tools
- Connect: Spender ID controls, SDM to mitigate R2D incidents
- New Verticals (Delivery): Restricted item detection, age verification, heavy item guardrails

Raise the Bar on Safety Assurance

In 2024, we want to focus less on the rearview and more on the road ahead.

From... Fixing gaps that we learn from incidents → *Lagging Indicators*

To... Prioritizing KPIs & processes that find and fix gaps → *Leading indicators*

2024, what does success look like?

1. We have meaningfully reduced **rider anonymity** (Rider ID US gen pop)
2. We have expanded to **Delivery** the largest proven interventions on Mobility (SDM, TRP, VCC)
3. We have strengthened defensibility on **2-wheeler safety**
4. We have moved more upstream on **growth bets**
5. We have even greater conviction in the defensibility and maturity of our systems (**Assurance**)

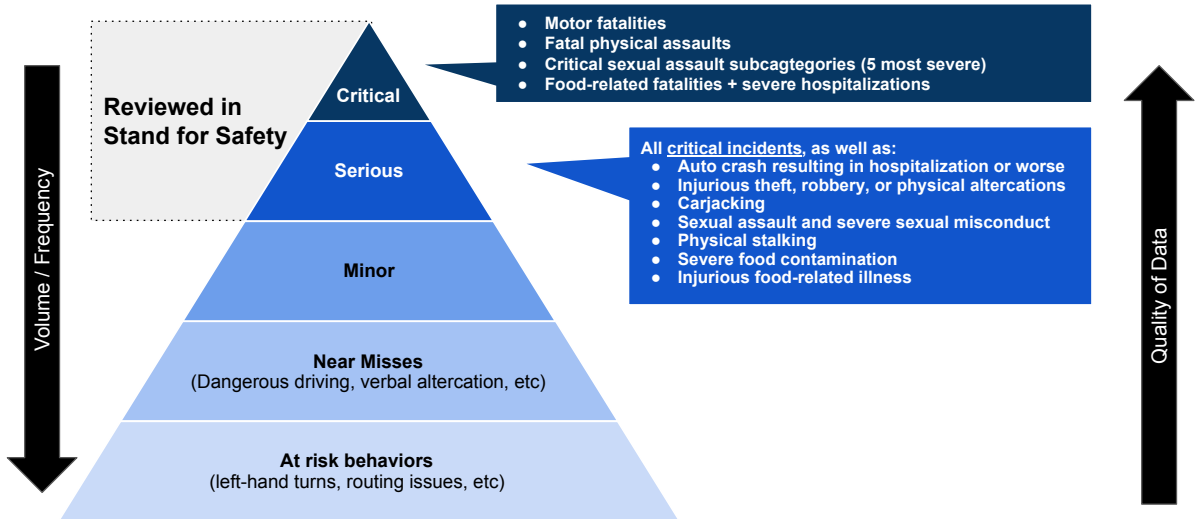
Appendix

Incident Rate Details

[Link to deprecated presentation slides.](#)

Defining Safety Incident Rate Metrics

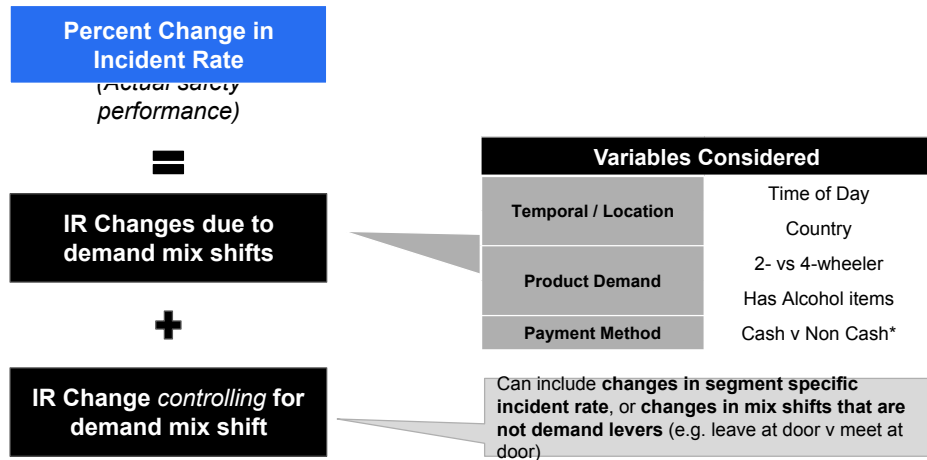
Our Safety Incident KPIs are categorized by severity using the Safety Triangle



Attorney Client Privileged & Confidential

Methodology for Understanding Safety Performance

Distinguishing changes in demand mix shift from changes in safety risk rate and other mix shift factors



* Serious physical assault incidents only

Throughout the year, brought updates to how our incident rate was performing, and time and again our analysis showed that the increase was not due to an increase in rate itself, but actually towards a shift in environmental and product factors that had higher incident rate. As we look to do our year end review, we wanted to quantify these elements to give the biz a better picture of where our change in rate was coming from, and how different business decisions (such as product launches) as well as environmental/ societal changes (such as return to pandemic) were affecting safety on the platform.

What we did:

[high level walk through mathematically of how to capture the two values]

[looking at the variables we had identified throughout the year - read off]

[only looking at company level goals – critical total and for each LoB]

Safety Data Audit Coverage

Critical Incident Audit Coverage by Language

Market Language	Mobility	Delivery
English	✓	✓
Spanish	✓	✓
Portuguese	✓	✓
French	✓	✓
Japanese	✓	✓
Arabic	✓	
Mandarin (Traditional)		✓