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Message

From: Dara Khosrowshahi [dk@uber.com]
Sent: 8/4/2021 10:10:05 PM
To: Liza Jones [liza.jones@uber.com]
CC: Carrol Chang [carrol@uber.com]; Camiel Irving [camiel@uber.com]; Dennis Cinelli [dennis.cinelli@uber.com]; Andrew Macdonald [mac@uber.com]; Boomerang Working [boomerang-working-group@uber.com]; boomerang-informed-group@uber.com; Nelson Chai [nchai@uber.com]
BCC: sachin.kansal@uber.com
Subject: Re: [A/C Priv] US&C Boomerang Update - 8/3/2021

Team Boomerang:

Nelson and I just got off our earnings call (not sure if any of you listened), and, while the short term markets didnt like how aggressively we leaned into supply, I'm absolutely convinced that we did the right thing. Your area is the area that investors care about passionately - my guess is ~50% of the Qs were about supply ... Good news is our driver acquisition numbers look much much better than the numbers Lyft shared. And while every week is a battle, our ability to pull back on incentives in July and lean into our tech/ops/DS/marketing capabilities is key to our success in the 2nd half.

We've come a long way but the stakes are higher than they've ever been. Nelson and I could not have been as confident about how we are going to perform in H2 if it werent for our confidence and belief in you.

UberOn and we are with you every step (and turn) of the way!

DK

Best,
DK

On Tue, Aug 03, 2021 at 5:53 PM, Liza Jones <liza.jones@uber.com> wrote:

*Cc Boomerang working group
Bcc Cross-functional leaders, Boomerang informed (join [here](#))*

Attorney-Client Privileged

All,

Happy August! Across July we saw **+8.3% MoM active driver growth** in the US and **+8.9% MoM SH growth** in the US. One specific highlight was our first trips number-- which improved **+30% MoM** for a total of 37.7K first trips.

Last week (7/26), we saw **+1.4% WoW SH** in the US. Active driver growth remained at **+0.8% WoW** for the second week in a row. Sessions fell **-2.8% WoW** leading to improved reliability (**+1.2ppt C/R; +1.5 ppt C/S**). Canada saw **+4% WoW SH**, but CAN SH recovery ratio remains flat at 55%.

This week is also trending down with **rides-Eligible SH -0.83% WoW yesterday, and sessions -3.55% WoW**. Given the summer is usually slower and in light of the new CDC guidance (& rise of delta variant), we hypothesize organic growth may start to slow on both the rider and driver side. In the last two weeks, our session recovery ratio fell from 62% to 58% while SH recovery ratio has stayed at 62%. This is similar to what we saw in November 2020 when session recovery fell from 40% to 35% in two weeks and continued to a low of 30% in early December. SH recovery ratio fell from 53% to 51% during this time. For now, this doesn't change our overall strategy-- we will continue to push high earning opportunities and find ways to

reduce onboarding and re-onboarding friction. However, we will continue to monitor and see if we need to adjust our expectations and strategy especially if sessions continue to drop faster than supply.

I've also included an update from our latest EPH push test where we tested weekly vs hourly earnings. Overall, churned drivers responded better to hourly earnings while ANFT responded better to weekly. You can see a full read out below and our XP plan [here](#). Moving forward, we'll have a standing section in this newsletter to provide updates on growth messaging (across EPH tests and incentive comms).

Thanks,
Liza, on behalf of the Boomerang team

Report Contents

US&C Driver Growth Metrics

- Week of 7/26
- Looking Ahead

What You Should Know

- EPH Push Test

What 's Happening this Week?

- Launches This Week
- Progress & Setbacks

US Driver Growth Metrics

For a more detailed look at recent driver growth performance, check out --> [Boomerang Metrics & Goals Tracker](#)

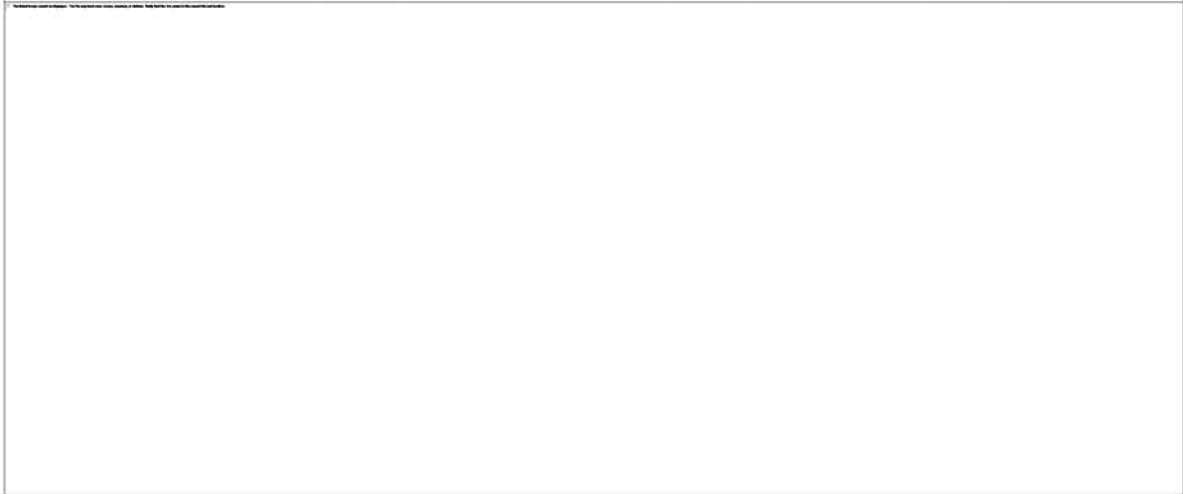
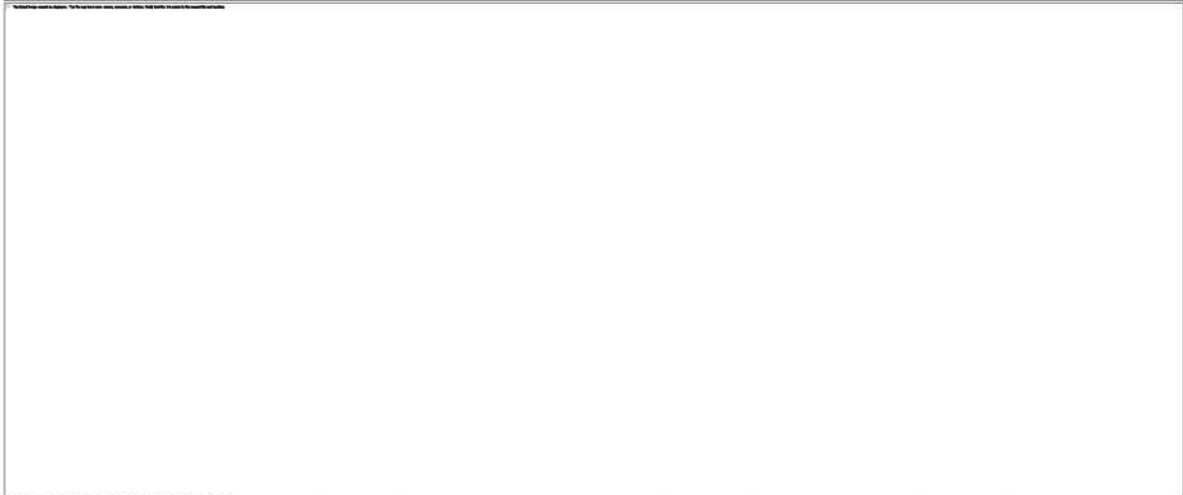
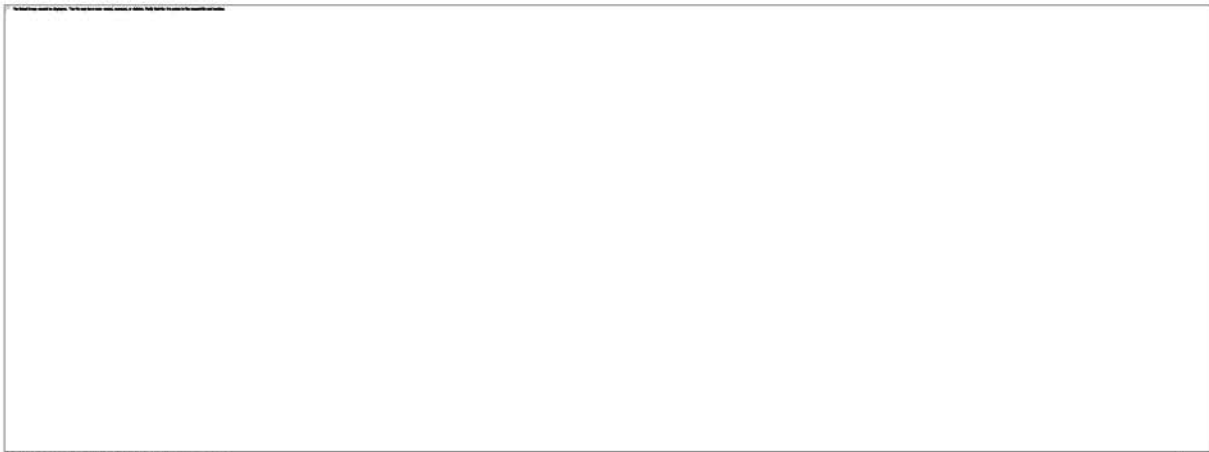
TLDR: After a down week, SH increased +1.4% WoW. Active driver growth stayed the same at +0.8% WoW. We hypothesize more mild growth may be due to the delta variant as well as seasonality.

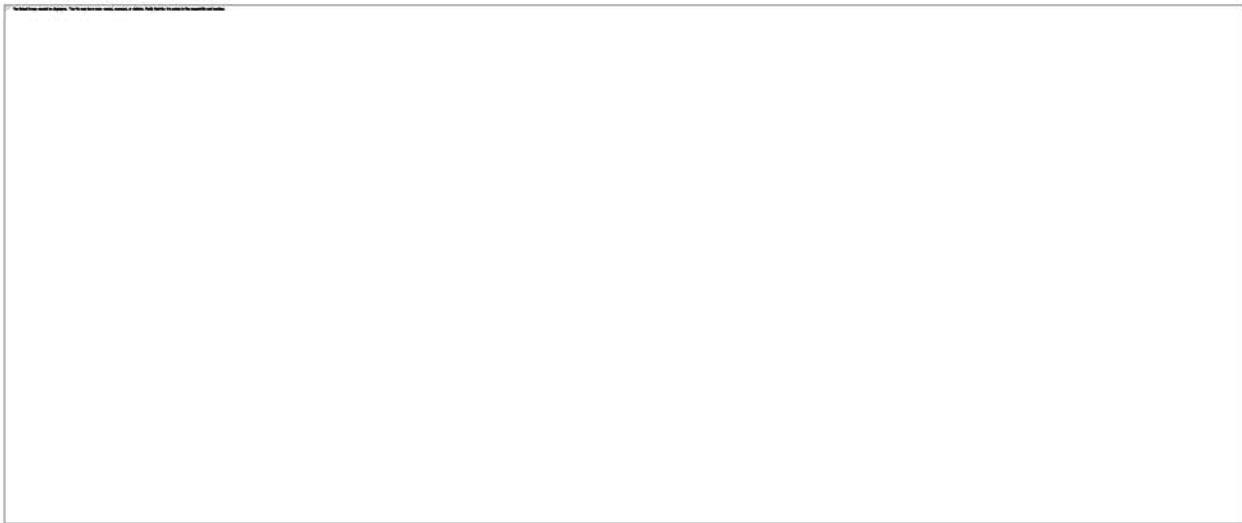
[July] US Driver Growth Performance

- **[US Net Driver Growth]** Active drivers increased +8.3% MoM for a total of 585K active drivers. This was driven by a:
 - +7.1% increase in resurrections for a total of 124.5K resurrected drivers
 - +30% increase in FTs for a total of 37.7K first trips
 - +16.8% increase in churn, or -124.6K lost drivers. However, we'd expect churn to increase as we're resurrecting more drivers onto the platform.
- **[US Supply Hours]** Supply hours increased +8.9% for a total of 39M SH

[Week of 7/26] Driver Growth & Marketplace Performance

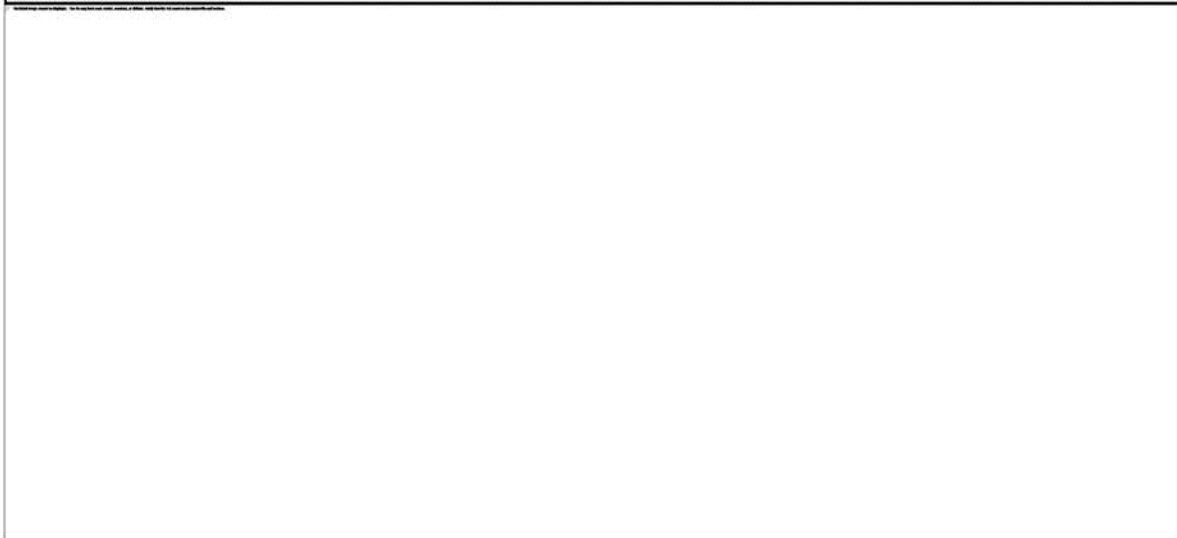
- **[US Net Driver Growth]** NDG was +4.6K the week of 7/19 compared to +5.7K last week. US WoW active growth was steady at +0.8%, putting US active drivers at 392k. The discrepancy between active driver growth and NDG is because churn is not calculated into NDG until 28 days after last trip, while active drivers show the total number of drivers on platform in the given week.
 - First trips increased for the second week +2.1% WoW (+200) to +8.2K
 - 28D resurrections were flat at +0% WoW (25.4K), which was slightly better than expectations based on LxHy
 - Churn was +4.7% WoW, driven by a slight increase in the resurrected driver churn (26.8%-->28.1%- expected based on LxHy). Existing driver churn rate was flat to slightly up (5.1%--> 5.3%) and new driver churn improved (20.6%-->19.4%)
 - Our US active driver recovery ratio remains at 53% of pre-COVID
- **[Supply Hours]**
 - US SHs increased last week (+1.4% WoW) to 8.6M however we are still down Wo2W
 - US SH Recovery Ratio rebounded to 61% of pre-COVID Sessions dipped to 57%-- two weeks in a row of declining sessions
- **[US Reliability]**
 - Reliability benefited from SH gains paired with softened sessions (-2.8% WoW), prompting C/R growth of +1.2ppts to 85.3%, the highest level since January.
 - Simultaneously, C/S grew +1.5ppts to 54.5%. Sessions surged fell -4.9ppts to 36.9%, encouraging higher conversion, with R/S growing +0.9ppts to 64.0%
- **[CAN]**
 - SHs increased last week (+4% WoW) fueled by growth in all T6 cities, however the Canada SH Recovery Ratio remains flat at 55%.
 - Reliability showed improvements LW as well with C/S improving +1.14% WoW to 64% and C/R improving +0.74% WoW to 87%. This metric continues to be dragged down by supply constrained cities such as Montreal and Vancouver. As a result of increased reliability, ETAs decreased -9% WoW to 5.47 minutes and sessions surged decreased -22% WoW to 21%.





Looking Ahead

- Unemployment benefits for the remaining states end on Labor Day, September 6th.
- EDI Budgets are currently scheduled to increase, but may change this week.
- We expect to slowly become better supplied over the next few months, as sessions stagnate and supply hours begin to come back.



What You Need to Know

[Driver Growth] EPH Test Plan & Results @hutchins

What It Is

- We are working to make our EPH pushes more relevant for different cohorts of drivers according to this [XP plan](#)
- The week of 7/23 we test sending weekly vs. hourly earnings-- 50% of churned and ANFT drivers received a push saying "Drivers are earning \$XX/hr on Uber" while the other 50% received "Drivers are earning \$XX/week on Uber"

What We Learned

p-value is <0.05 for all metrics where the p-value is not explicitly given

- **Overall:** Overall, we saw stat-sig positive resurrections (+4.4%; +875 drivers), SH (+4.3%; +6103 SH), and Eats Trips (+26.8%; +12,815 Eats Trips). However, we saw stat sig negative Rides trips (-1.3%; -2985)
 - We hypothesize that the drivers encouraged to resurrect by EPH results are more safety-conscious than our control group who resurrected organically and thus more likely to return to Eats trips. We are working to make it more clear that the EPH numbers are rides only.
- **Churned:** Hourly EPH numbers performed better across all churned driver metrics. Specifically:
 - Resurrection: +3.7% (p=0.06) for Hourly vs +2.8% (p=0.11) For Weekly
 - Rides Trips: +1.8% for Hourly vs -1.4% for Weekly
 - SH: +4.7% for Hourly vs +0.1% (not stat-sig) for Weekly
- **ANFT:** Weekly EPH numbers performed better across all ANFT metrics, however hourly numbers were still strong. Specifically:
 - Resurrection: +8.8% for Hourly vs +12.2% For Weekly
 - Rides Trips: -2.9% for Hourly vs -12.8% for Weekly
 - SH: +9.1% for Hourly vs +12.3% for Weekly

What's Next

- We'll continue using hourly earnings since the churned group is about 4x larger than ANFT so we're optimizing toward them

- We're also improving our messaging to make clear the earnings numbers we provide are for driving passengers in an effort to increase rides trips
- **This week**, we are testing p50 vs p75 earnings. Copy below:
 - Drivers in your area earn [p50]/hour
 - Top Drivers in your area earn [p75]/hour
- **On Friday**, (launching 8/6) we are testing messaging to mid-funnel drivers that shares how much new drivers earned last month. Additionally, we're testing a personalized message to churned drivers that lets them know how much other drivers who drove as much as they did pre-churn are earning now. Example copy below:
 - Standard EPH (control): Drivers in your area earned \$XX/hour
 - Mid-funnel (treatment): New drivers earned \$XX/hour
 - Churned Drivers (treatment): Drivers who drove as much as you earned \$XX/hour last week

What's Happening This Week?
Week of 8/2

For a more detailed look at this week's progress, priorities, and problems, check out --> [Boomerang Workstream Priorities - Week of 7/27](#)

Select Launches This Week				
Monday				
[Driver Growth] Product Surge Alerts [Access] VI Form Flows				
[Crossover] VOC Campaign				

Progress & Setbacks

Category

Updates

Weekly Progress & Wins

US

- **[Driver Growth]**
New LxHy cycle will not include soft-churned drivers for tier 2&3 cities. We expect \$600K in savings and minimal SH impact since these drivers are more likely to game
- **[Driver Growth]**
Expanding 2nd FT referrals to 200+ cities early next week
- **[Driver Growth]**
EPH resulted in +875 new drivers and +6103 SH last week
- **[Driver Growth]**
Hertz purchase of 500 Hyundai Konas (all EVs) for Uber use. Vehicles will be available in late August at the earliest
- **[Access- BGCs]**
Assess launched in 3 special criteria markets (PA, VA and DC)
- **[Access- BGCs]**
Between Jul 18-30, 21 adjudicators were added to live queues, bringing total HC to 105
- **[Crossover]**
Crossover EPH resulted in +346 new drivers and +5806 SH last week. Working with marketing to develop a go-forward plan and expand to C2D onboarding

Canada

- **[Driver Growth]**
Launching Premium EDI campaign in Edmonton for Aug 9
- **[Driver Growth]**
D3G120 vs. D10G400 test in Montreal proved that higher trips + offer achieved +28% higher lift Target vs. Control

	<ul style="list-style-type: none"> • [Driver Growth] Launching Exploding NDI in Montreal and Vancouver on Aug 3
<p>Blockers & Setbacks</p>	<p>US</p> <ul style="list-style-type: none"> • [Driver Growth] Tik Tok was unable to go live due an issue with a watermark on the creators content. Once removed, the campaign should be set to go live again • [Driver Growth] Hertz is investigating the discrepancy between their suggested supply availability and our calls to branches that did not indicate they have ample cars available. • [Access- BGCs] Return-to-health date pushed back (8/18) due to attrition and reduced efficiency of new adjudicators • [Crossover] MOB increase to 50% on hold until 8/23 due to concerns about the additional BGC dual adjudication training

Liza Jones
US&C Driver Growth



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