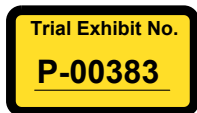


Metadata

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| Attachment Names   | ppt  | SEMANTIC           |
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| Collaborators      | andrew.moon@uber.com; joanna.shujman@uber.com; haas@uber.com; sarah@joancreative.com; lisa@joancreative.com; carley@uber.com; phyllis@uber.com; jaimie@joancreative.com; lizzie.ross@uber.com  | SEMANTIC           |
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The background of the slide is a cityscape at sunset or sunrise, with buildings and a river visible. The Uber logo is centered in the lower half of the slide.

# Safety Marketing Phase 2 Audience Recommendation

November 2019

Uber

# Female Riders 18-34

## Females Riders 18-34 are an important cohort for building trust in the wake of the Safety Report.

- Females 18-34 are **sizable**: they represent nearly one third of our Active Rider base (30%)
- They are the group most heavily **impacted by negative safety news** events, with more safety concerns about Uber after these events
  - After the South Carolina incident, Female Riders 18-34 had a 5ppt negative impact on feeling safe using Uber
    - The % of Female Riders 18-34 who feel unsafe using Uber (B2B) rose from 9% to 14%, and the % of those who feel very safe using Uber (TB) fell from 38% to 34%
    - Compare this to overall Riders, who had a smaller impact. The % of Riders who feel unsafe using Uber (B2B) saw less of an increase (from 6% to 8%), and the % of those who feel very safe using Uber (TB) was impacted less (from 43% to 40%)
  - In the wake of the CNN Investigation and Tempe ATG Crash Report, Female Riders 18-34 saw a 5ppt negative impact on feeling safe using Uber
    - The % of Female Riders 18-34 who feel very safe using Uber (TB) fell from 44% to 39%, and the % who feel unsafe using Uber (B2B) rose from 8% to 10%
    - Compare this to overall Riders, who saw less of an impact. The % of Riders who feel unsafe using Uber (B2B) saw no change during this time, and the % who feel very safe using Uber (TB) had a smaller change from 44% to 42%
- They are more likely to be **dual appers** and thus present a churn risk: 49% of Females 18-34 are dual appers (vs. only 40% of overall Riders)
  - We know from qualitative research that if we release a Safety Report and our competitors don't, the gut reaction among Riders is that we must be less safe than our competitors — and we run the risk of dual-appers swinging usage towards Lyft. It is only through our actions that we can demonstrate the safety of our service and our commitment.

# Drivers

**Drivers (male and female) are also a vulnerable audience – both in general and with regard to the Safety Report. We must continue to focus efforts on addressing needs of this audience in both the short and long term. Safety is a way to maintain an open line of communication to start demonstrating that we care about their experience.**

- We have seen **overall sentiment decrease** among Drivers after the Drivers' strike and IPO. In Q3, sentiment has not recovered to pre-strike/pre-IPO levels.
  - Drivers have seen a 4ppt decrease in brand favorability (TB) between Q1 and Q3 (from 54% to 50%)
  - Drivers have seen a 4ppt decrease in satisfaction (TB) between Q1 and Q3 (from 42% to 38%)
- When it comes to safety, many **Drivers believe we prioritize Rider safety** over Driver safety (48% globally). This could become a hot button issue with the release of the report.
  - Globally, 67% of Drivers report experiencing an incident that made them feel unsafe, but of these only half reported the incident (58%) and of those that were reported, less than half were resolved in a satisfactory way (42%). Of those who had experienced safety incidents but not reported them, more than one third (37%) said this was because they did not believe the company would take action on their behalf.
- In the context of the report, **Driver vulnerabilities will differ by gender.**
  - Female Drivers are a safety-sensitive audience with lived experience of safety incidents.
    - After the South Carolina incident, Female Drivers who feel unsafe using Uber (B2B) rose 5ppt (11 to 16%)
    - In the wake of the CNN Investigation and Tempe ATG Crash Report, Female Drivers saw a 6ppt negative impact on feeling safe using Uber (50 to 44%)
    - Male Drivers did not see impacts to feeling safe during this period
  - Male Drivers are easy potential scapegoats for safety headlines (especially post Safety Report) and don't believe Uber will have their back