



Trial Exhibit No.
P-00305



The following report highlights the key findings among U.S. [Prospective Riders](#).

It is a part of the **Safety Brand Tracker** — a roadmap that enables understanding for how each part of our business impacts safety and can align efforts for maximum impact in every city.

Based on the qualitative work of the Safety Brand Narrative, we know that trust and safety matters, and how it can be operationalized.

Now, using quantitative findings, we understand:

- 1 The business opportunity safety presents
- 2 Uber's competitive positioning on safety sentiment
- 3 How to prioritize products, programs, and policies

Quarter-to-quarter comparisons are shown where applicable. Trending information is not available (two waves of data collected to date. We intend to collect two additional waves in 2018.)

Australia, Brazil, India, and Mexico were added in Q4 2017. [U.S. Safety Sentiment Questionnaire](#)

Uber Prospective Rider Demographics

Methodology Overview:

A blind online survey was conducted among prospective riders who:

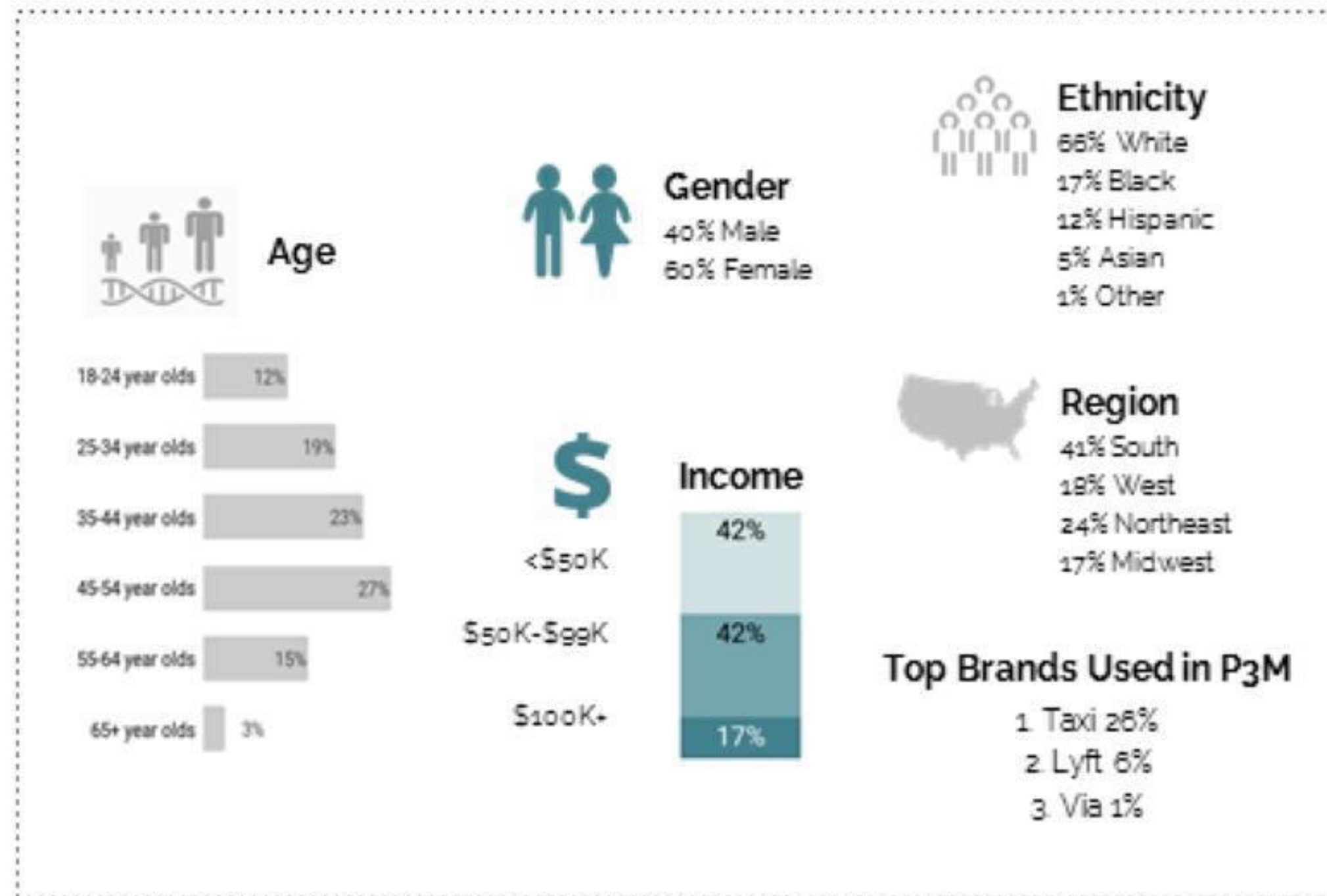
- Have never ridden with Uber but have at least heard of Uber, and are open to riding with a ridesharing service in the next 3 months OR reason for not riding is a safety concern and open to riding if safety barrier is removed
- Meets qualification: 18+ years old, smartphone

The data has been weighted to reflect the prospective rider population in Wave 1 (Q1 2017) of the study.

Sample source: Third-party Panel

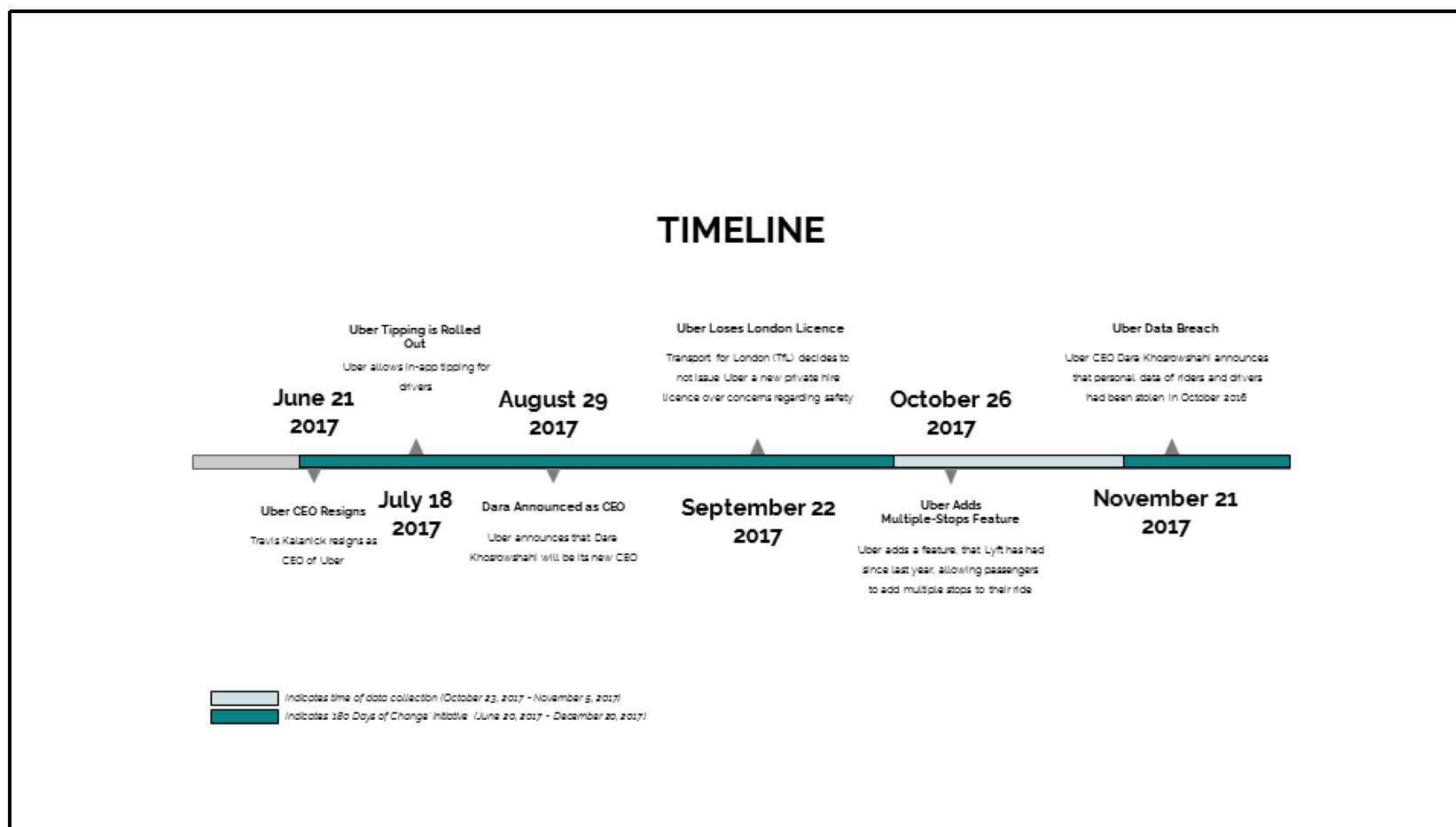
Total base: N=520

Data collection dates: 10/23 - 11/5, 2017



Base: Total Prospective Riders (520)
S1 / S2 / S3 / S4 / S5 / S6

18



- <http://uk.businessinsider.com/uber-multiple-stops-feature-lyft-2017-10?r=US&IR=T>
- <https://www.nytimes.com/2017/11/21/technology/uber-hack.html>
- <https://www.nytimes.com/2017/06/21/technology/uber-ceo-travis-kalanick.html>
- <http://uk.businessinsider.com/dara-khosrowshahi-is-officially-ubers-new-ceo-2017-8?r=US&IR=T>
- <http://www.bbc.com/news/uk-england-41358640>
- <https://pages.et.uber.com/180-days/>



Executive Summary: Prospective Riders

- What is consistent with Q2'17?

As consistent with the findings from last wave, we see:

Safety impacts acquisition

- 42% (vs. 43% in Q2'17) of the general population have a potential need to use rideshare services.
- "Concerns for safety" is the largest barrier for not trying rideshare.

Uber does not differentiate on Safety KPIs among Prospective Riders

- Both Uber and Lyft are at parity on organizational commitment to safety, as well safety of the service.
- There is an opportunity for Uber to improve Safety perceptions among Prospective Riders.

Opportunities to improve awareness of safety features

- Many prospect riders are not aware of features or policies in place to protect their safety while ridesharing.
- For example, just 13% are aware that Rider Insurance is provided, and many are not aware of criminal/driver background screening.

Perceptions of safety features remain largely unchanged

- Background Screening & Driver Information continue to be top current initiatives that make Prospective Riders feel "a lot safer"
- Emergency button continues to be a new feature that will make riders feel "a lot safer" - 72% (vs. 71% in Q2'17).



Executive Summary: Prospective Riders

- What is new?

Women have higher sensitivity on safety

- Over half of Prospective Riders are deeply concerned about experiencing an issue that threatens their safety while using rideshare.
- Sexual assault/harassment was the top overall concern among women, while an impaired driver is a top concern for men.
- Prospect women generally feel less safe using Uber or Lyft than do men.

Uber lost ground to Lyft on brand metrics

- Lyft saw significant increases in brand favorability, trust, and likelihood to use in Q4'17, while Uber results were mostly flat.
- Prospects are still more likely to use Uber however, as it is perceived as being more ubiquitous and easier to use than Lyft.

Initiatives are not breaking through

- While Prospective Riders are generally aware of more basic features like trip monitoring and the feedback system, they are much less familiar with options available to them in the event an incident does occur.
- Awareness of Uber safety initiatives and policies did not improve since last wave, and is no different than Lyft.

Grow Uber impact in communities

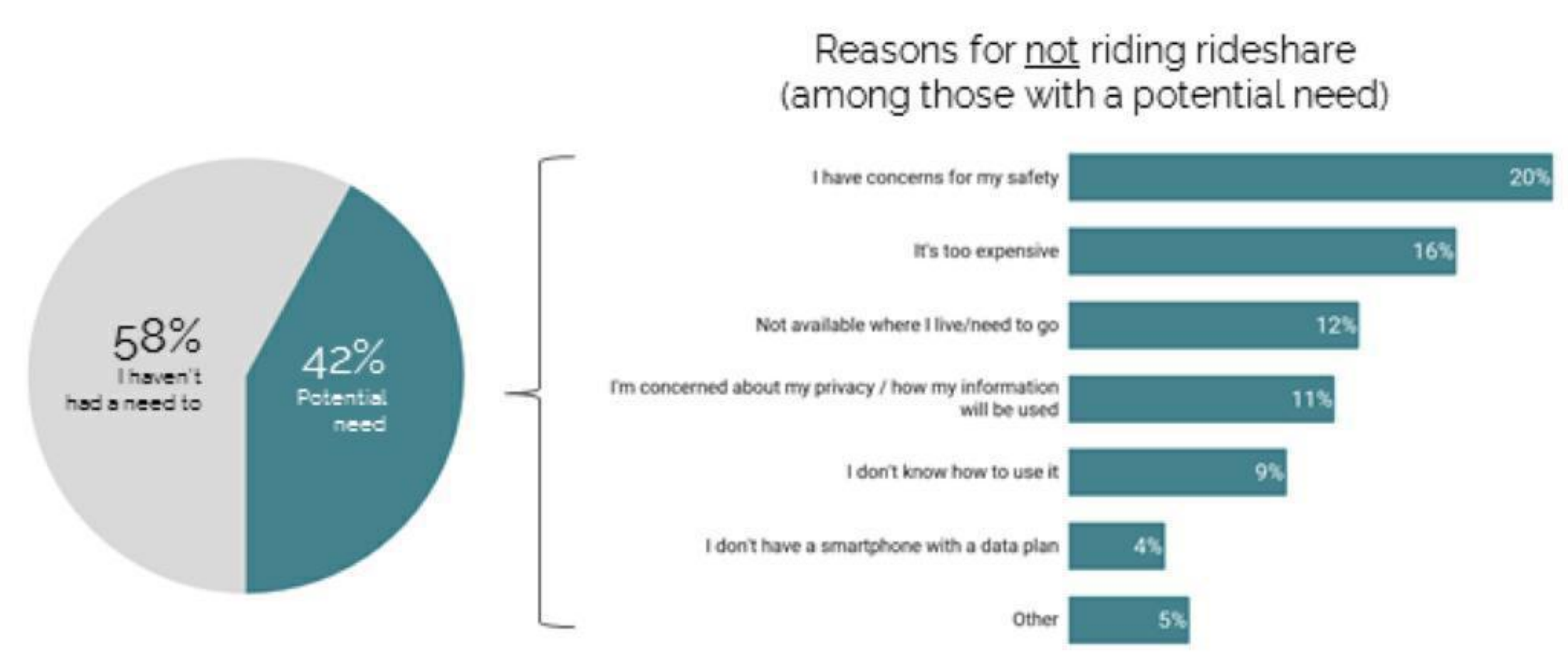
- While Uber is seen as doing more for causes like Drunk Driving, no other major tech company has laid claim to Women's Safety as a cause, creating a potential opportunity for Uber.

**SAFETY
IMPACTS
ACQUISITION**

Over half of Prospects have a safety concern that may impact their willingness to use rideshare. Sexual assault / harassment is a top concern for female Prospect Riders.



Safety is the top concern among prospects who have a potential need to use rideshare services



Base: General Population (18yup)
B1: Which of the following reasons play a role in why you haven't taken a ride with a ridesharing service (e.g. Uber, Lyft, etc.) recently / not likely to take a ride in the future?

Slide 8

1 i believe KMB is looking into this and see if there's difference between gender. if so, yes we are including the gender cut.
+travis.rind@kantarmillwardbrown.com please confirm

Reassigned to Travis Rind

Abbie Ding, 1/9/2018

1 Men more likely to not ride due to:
- It's too expensive
- I don't know how to use it
- I don't have a smartphone with a data plan
- I'm concerned about privacy/how my information will be used

No skews for females

Travis Rind, 1/10/2018

1 travis - can you provide the number for safety male v female - is there a skew that maybe is 80% significance level?

Jeremy Burbank, 1/11/2018

1 +abbied@uber.com

Is KMB looking into this by gender?

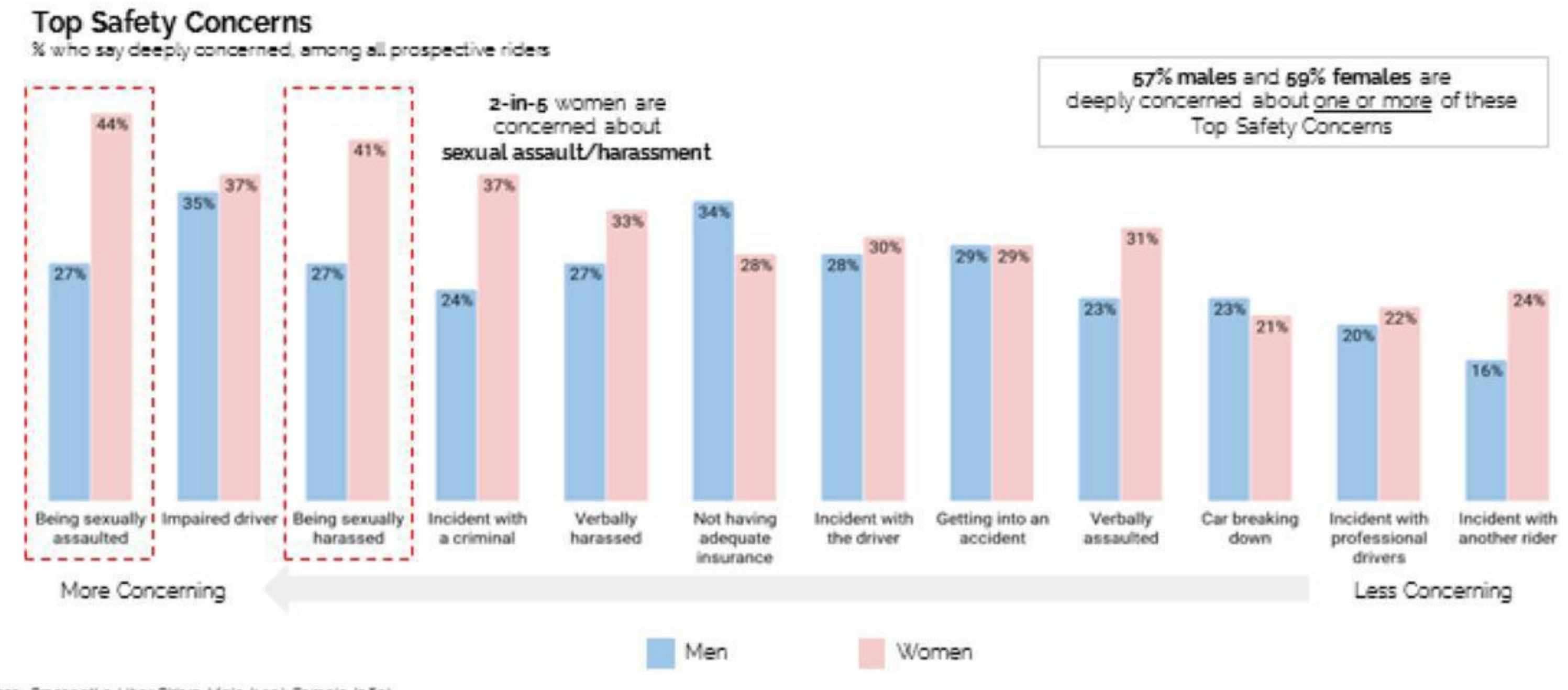
Reassigned to Abbie Ding

Hollis Shoor, 1/11/2018

2 19% for male and 20% for female, so not sig even at 70% CI

Travis Rind, 1/11/2018

The top safety concern for women is sexual assault, while men are most concerned about an impaired driver



Base: Prospective Uber Riders (Male 1,191; Female 1,161)
Q9: How concerned are you about each of following when considering whether to use Uber/Lyft?
N among those who indicate they are deeply concerned - 1) ride or will avoid taking some ride

**UBER
DOES NOT
DIFFERENTIATE
ON SAFETY**

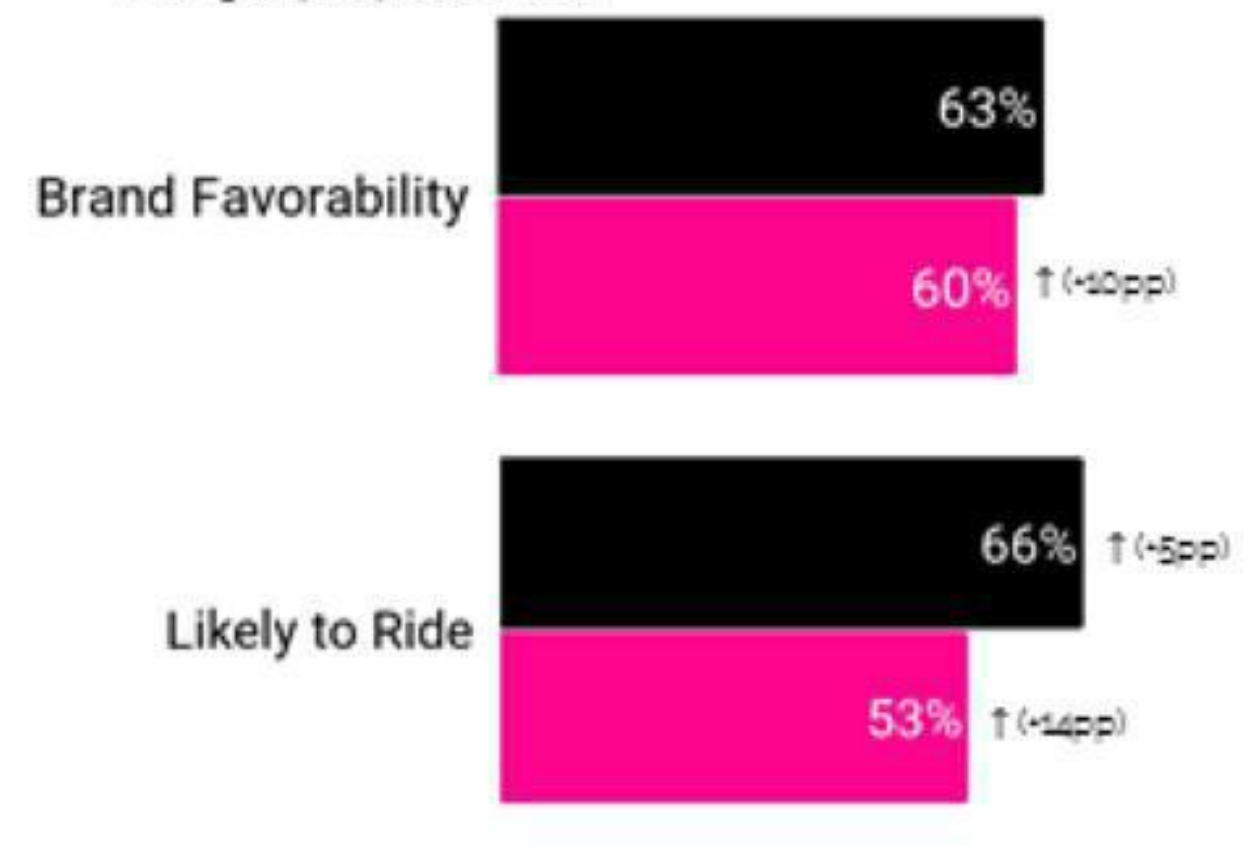
Lyft gained ground on Uber on brand
favorability, trust and likelihood to use, but
not on safety KPI's.



Lyft narrowed the gap with Uber on brand favorability / likelihood to ride this wave

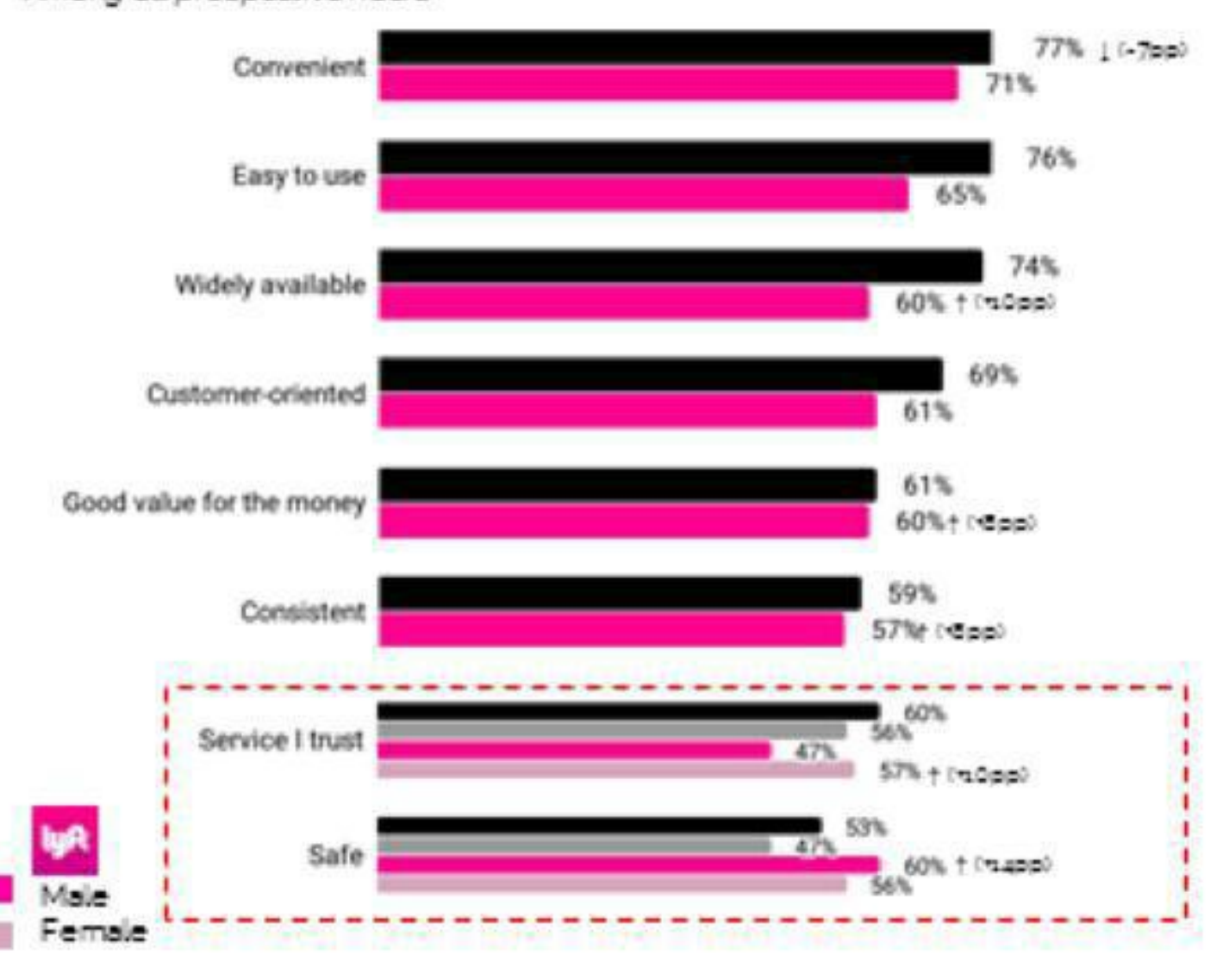
Brand Favorability & Likelihood to Ride

% of somewhat/very favorable & probably/definitely will take a ride
Among all prospective riders



Other Brand Attributes

% who 'Strongly' or 'Somewhat' Agree
Among all prospective riders



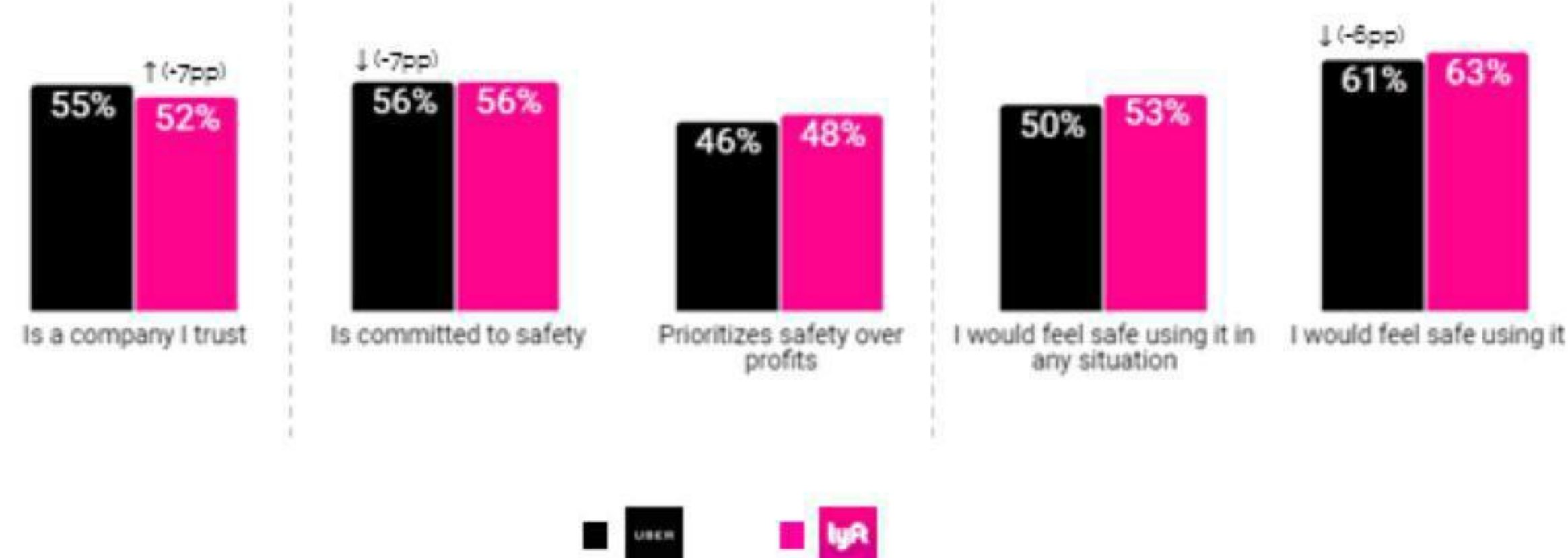
Base: Prospective Riders rating Uber Total (320), Male (155), Female (165), Lyft Total (244), Male (78), Female (166)
 †1: How likely are you to take a ride with each of the following services in the next 3 months? †2: How favorably do you view each of the following companies? †3: Below are a series of statements that can be used to describe transportation services. Please indicate to what extent you agree that each statement describes each service. † indicates score significantly higher/lower than W's at 90% C.I.

Lyft also drew even with Uber on 'trust'; neither company is differentiated on the safety KPI's

Prospective Riders

Safety KPIs

% of who 'Strongly or Somewhat Agree' among prospective riders



Base: Prospective Riders rating Uber (20), Lyft (24).
 Bx: How much do you agree with each of the following? B6: Thinking about everything you have heard, read, or experienced with each transportation service as a rider, how much do you agree with the following statements? I would feel safe using it in any situation and Prioritizes safety over profits not asked in W1 T1. Indicates score significantly higher/lower than W1 at p < 0.05.

12

Women are less likely than men to feel safe using either Uber or Lyft

Safety KPIs

% of who 'Strongly' or 'Somewhat Agree' among prospective riders



Base: Prospective Riders rating Uber Male (155) Female (265) Lyft Male (76) Female (158)
Bx: How much do you agree with each of the following? Bx: Thinking about everything you have heard, read, or experienced with each transportation service as a rider, how much do you agree with the following statements? I would feel safe using it in any situation and Prioritizes safety over profits not called in W1. T1 indicates score significantly higher/lower than W1 at p < 0.05.

There continues to be a greater unease with getting in a car with a stranger and driving safety than cyber safety concerns

Note: Data collected prior to announcement of break on November 21st

Cyber Safety: % of prospective riders who Somewhat or Strongly Agree



Physical Safety: % of prospective riders who Somewhat or Strongly Agree



Emotional Safety: % of prospective riders who Somewhat or Strongly Agree

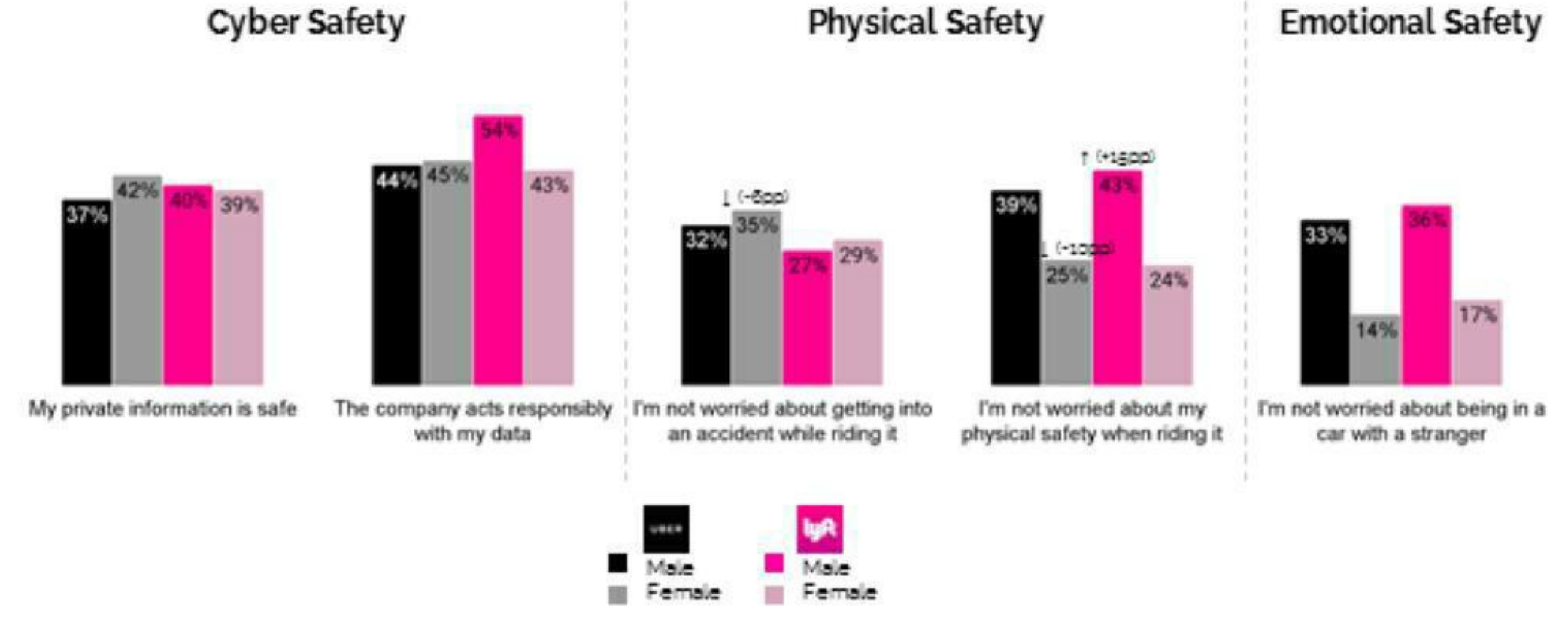


Base: Prospective Riders rating Uber (20), Lyft (24).
 BB Thinking about everything you have heard, read, or experienced with each transportation service as a rider, how much do you agree with the following statements?
 t1 indicates score significantly higher/lower than Lyft at 95% CI. No stat testing done for 'I'm not worried about being in a car with a stranger'

Women are more concerned about their physical safety and being in a car with a stranger

Note: Data collected prior to announcement of break on November 21st

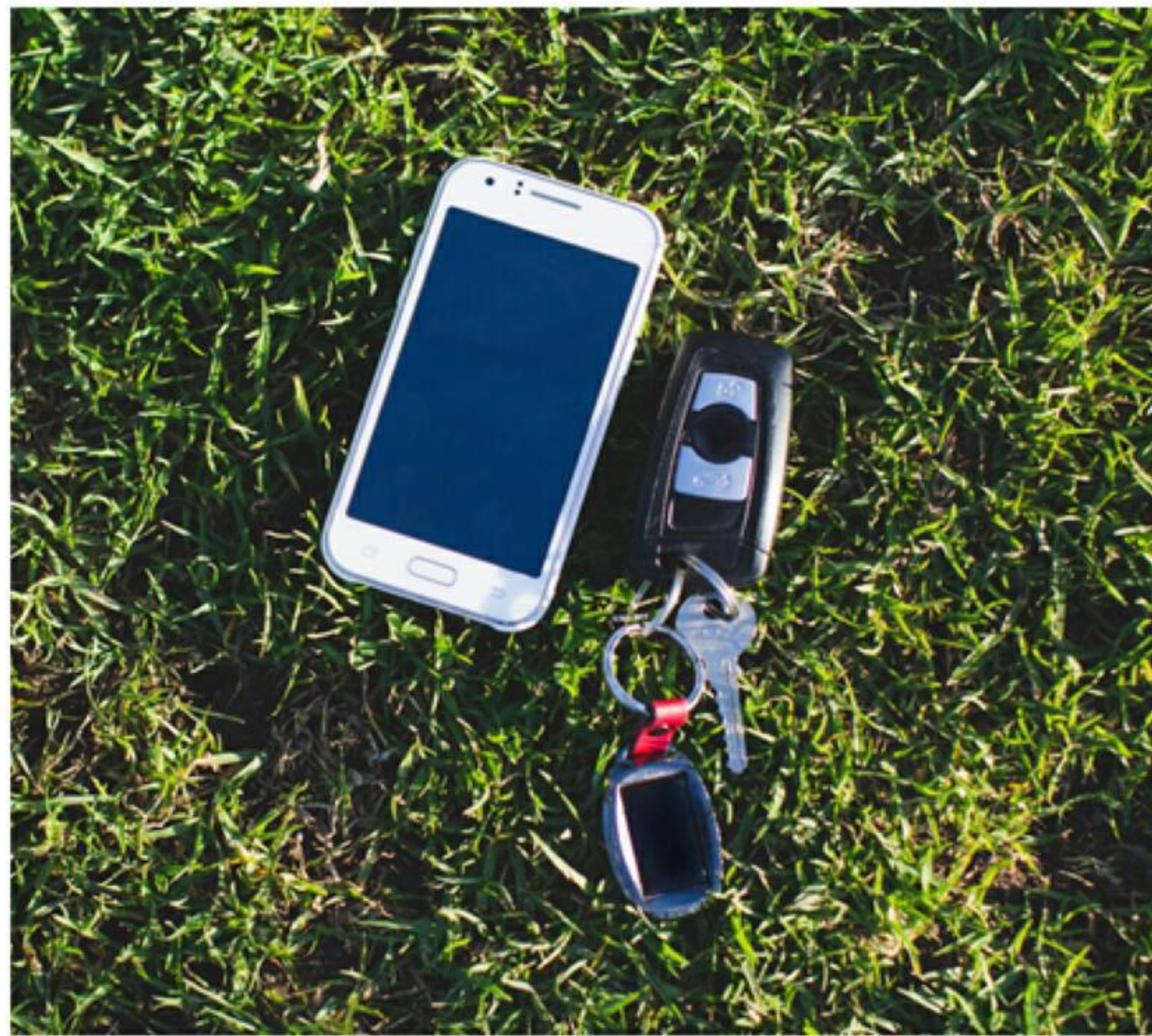
Safety Dimensions
% of who Strongly or Somewhat Agree among prospective riders



Base: Prospective Riders rating Uber Male (155) Female (35) Lyft Male (76) Female (158)
88 Thinking about everything you have heard, read, or experienced with each transportation service as a rider, how much do you agree with the following statements?
1) indicates score significantly higher/lower than 50% CI. No stat testing done for 'I'm not worried about being in a car with a stranger'

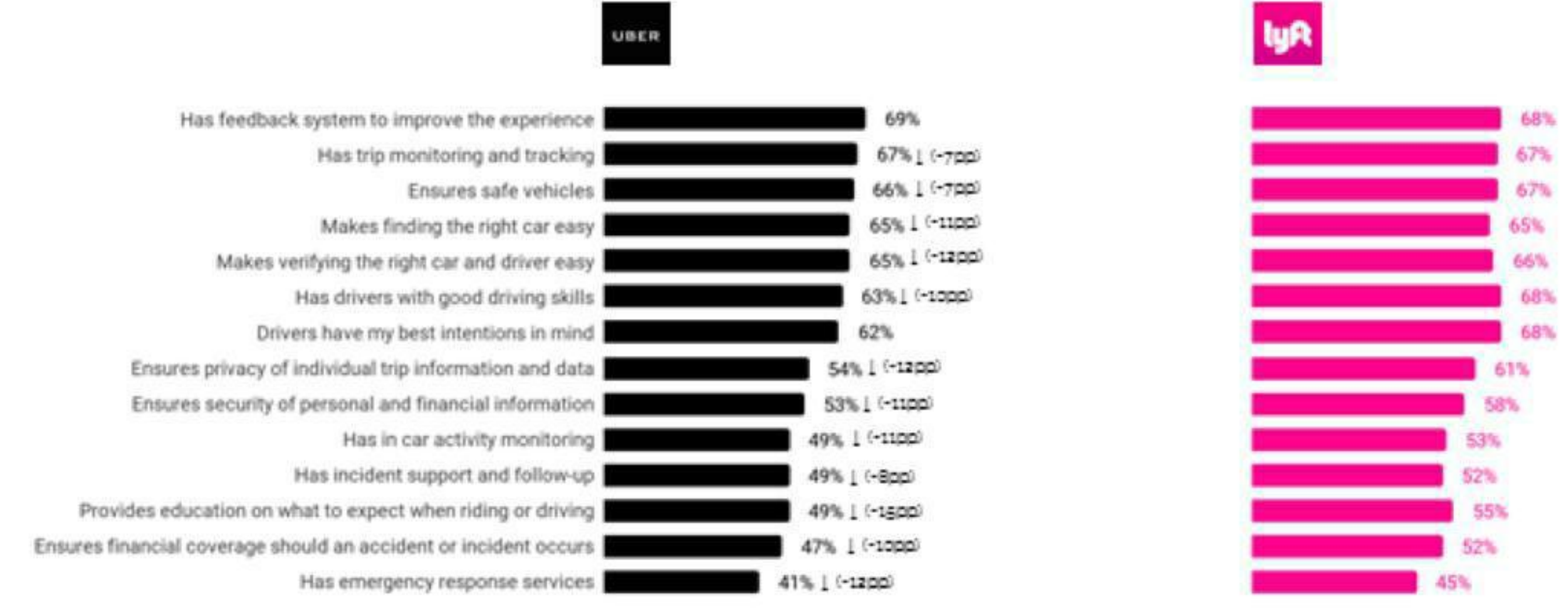
**INITIATIVES
AREN'T
BREAKING
THROUGH**

Many prospects are unaware of how Uber
is addressing their top safety concerns.



Uber is perceived very similarly to Lyft on most technology and policy features

% of Prospective Riders that say 'Meets' or 'Exceeds' Expectations

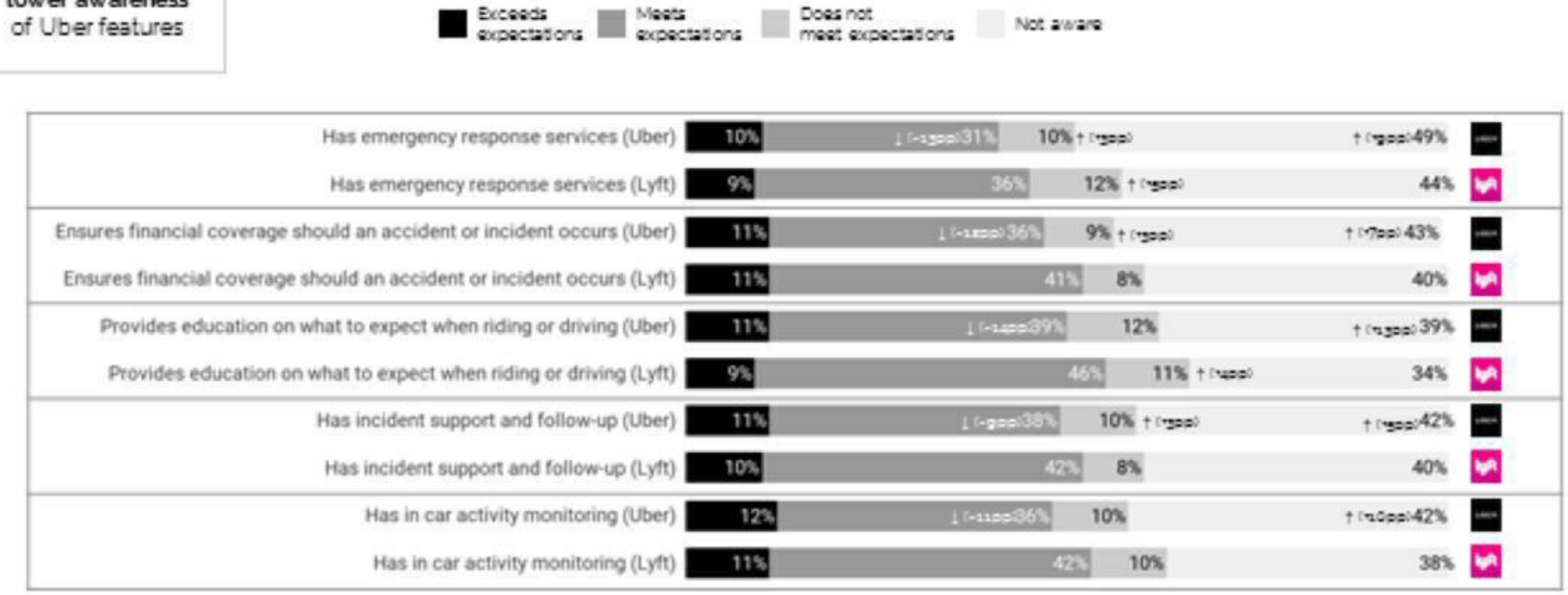


Base: Prospective Riders rating Uber (201), assigned Lyft (244)
 C1: Based on what you have heard, read or experienced, how would you rate the transportation services, as a rider, on each of the following?
 † indicates score significantly higher/lower than Wt at 95% CI. Note: data collected before announcement of data breach on Nov 21, 2017.

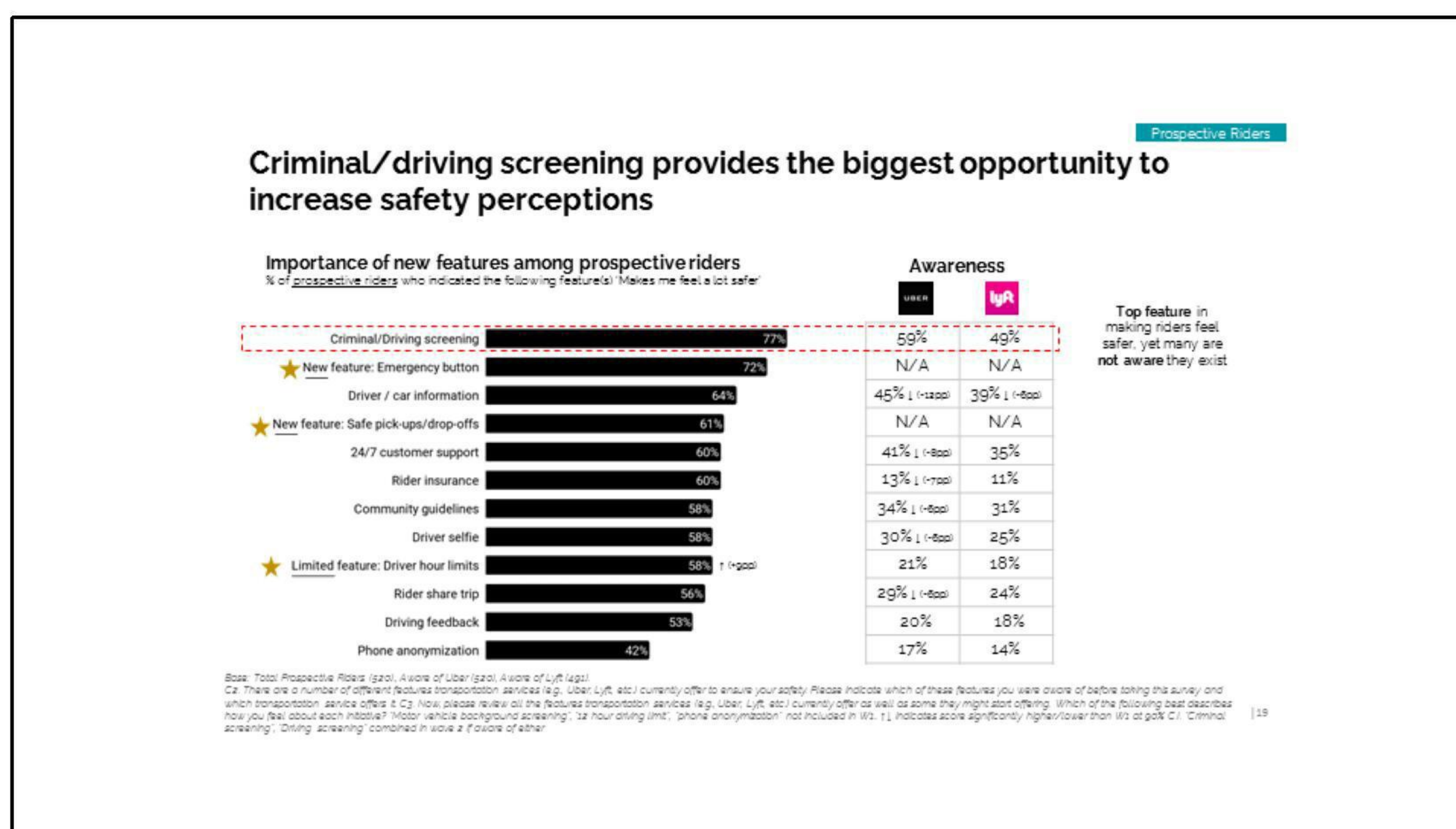
Prospect riders generally are unaware of programs and policies that exist should something go wrong

Women tend to have lower awareness of Uber features

Performance Needs, among Prospective Riders



Uber's weakest performing attributes in Wz shown. Base: Prospective Riders rating Uber (20), assigned Lyft (24).
 C1: Based on what you have heard, read or experienced, how would you rate the transportation services, as a rider, on each of the following?
 Bar may not sum to 100% due to rounding. † indicates score significantly higher/lower than Wz at 90% C1.



- **Criminal screening:** Criminal background screening of drivers including to screen out drivers who have felonies, or misdemeanors from joining the app.
- **Emergency button:** Riders or drivers could activate an emergency button in the app to call local authorities and provide vehicle details and GPS location. send car make, model, color, license plate, driver name and phone number, and exact location using GPS.
- **Driving screening:** Motor vehicle background screening of drivers including to screen out drivers who have speeding violations over 20 mph, DUIs, and reckless driving incidents.
- **Driver / car information:** Driver picture, car type, and license plate number are provided to riders in the app when they order a car.
- **Safe pick-ups/drop-offs:** The app will help riders and drivers avoid pick-up and drop-offs in known dangerous zones such as designated taxi or bus zones or places where drivers are more likely to encounter violence.
- **Driver selfie:** Drivers take a selfie that is verified against their picture on file to ensure that only registered drivers can pick-up riders.
- **24/7 customer support:** Customer Support 24/7, an emergency response phone number, and an Incident Response Team dedicated to investigating any incidents that occur.
- **Driver hour limits:** Limits drivers from driving more than 12 hours before requiring a break of at least 6 hours.
- **Rider Insurance:** Each ride covered by a \$1 million commercial liability insurance covering bodily injury and property damage to you or third party involved in the incident.
- **Community guidelines:** Published driver and rider behavior policies against things

like driver drug and alcohol use, open containers of alcohol for riders, weapons, and smoking.

- **Rider share trip:** Rider share trip, click a link in the app, so you can share your GPS location, as well as the car and driver information with a friend or loved one.
- **Driving feedback (Delphina):** Speeding, braking, and phone handling is recorded for each trip using the driver's smartphone movement. This feedback is provided to drivers via a daily report.
- **Phone anonymization:** When calling a rider or driver, phone number anonymization hides the driver's and rider's real phone numbers.

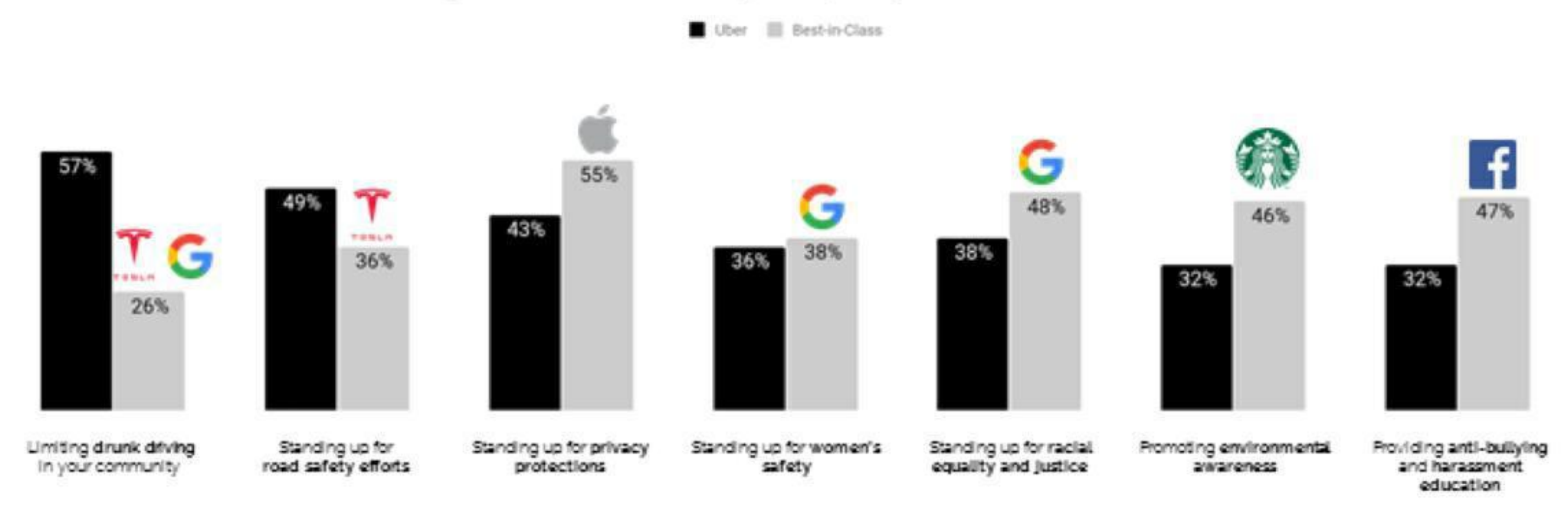
**GROW IMPACT
IN
COMMUNITIES**

*Riders feel Uber can do more to support other
causes, beyond those specific to driving.*

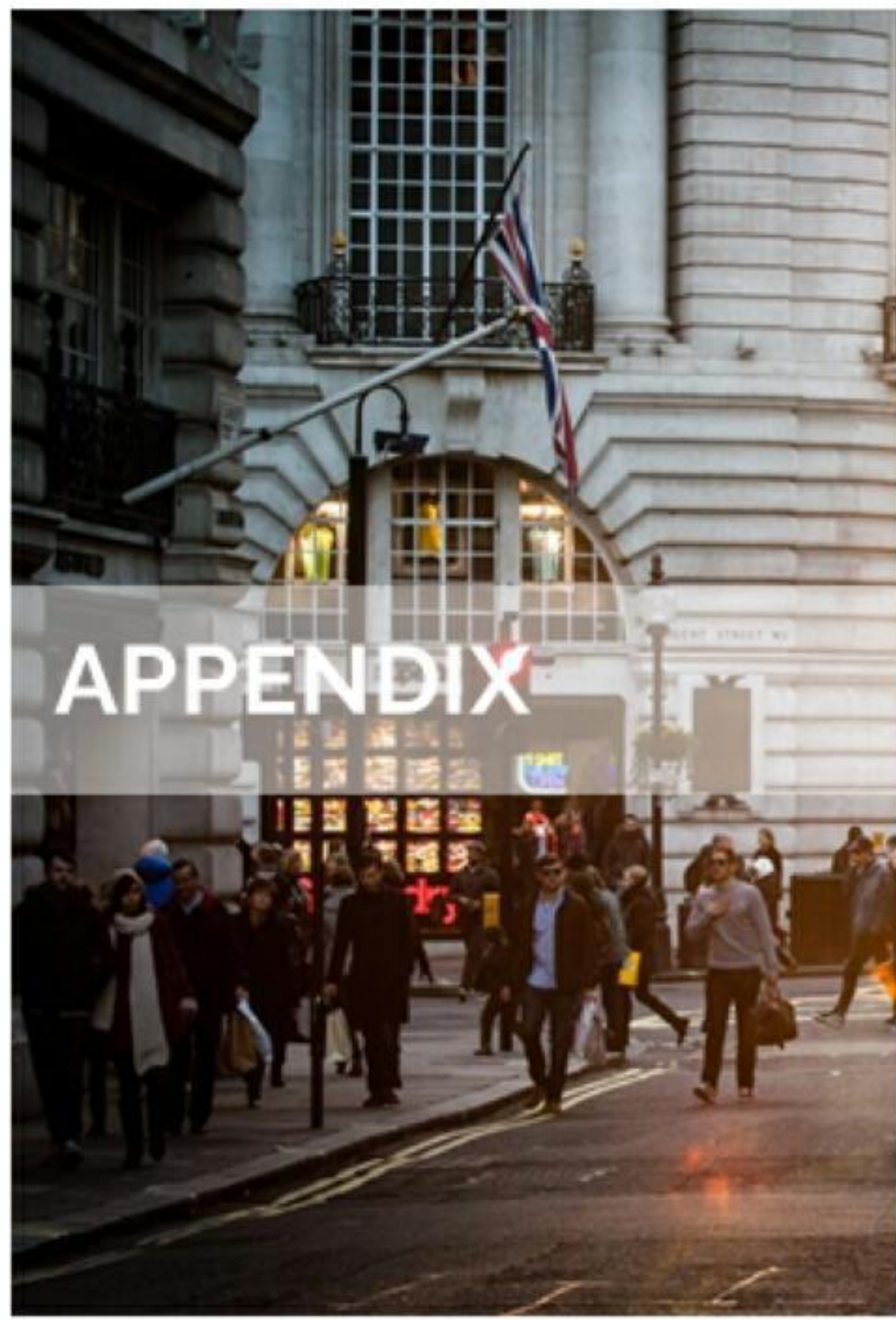


Uber is associated with drunk driving and road safety causes, but there is an opportunity for women's safety as no other tech company is strongly associated with that cause

% indicating 4 or 5, with 5 being company 'does a lot for this cause'



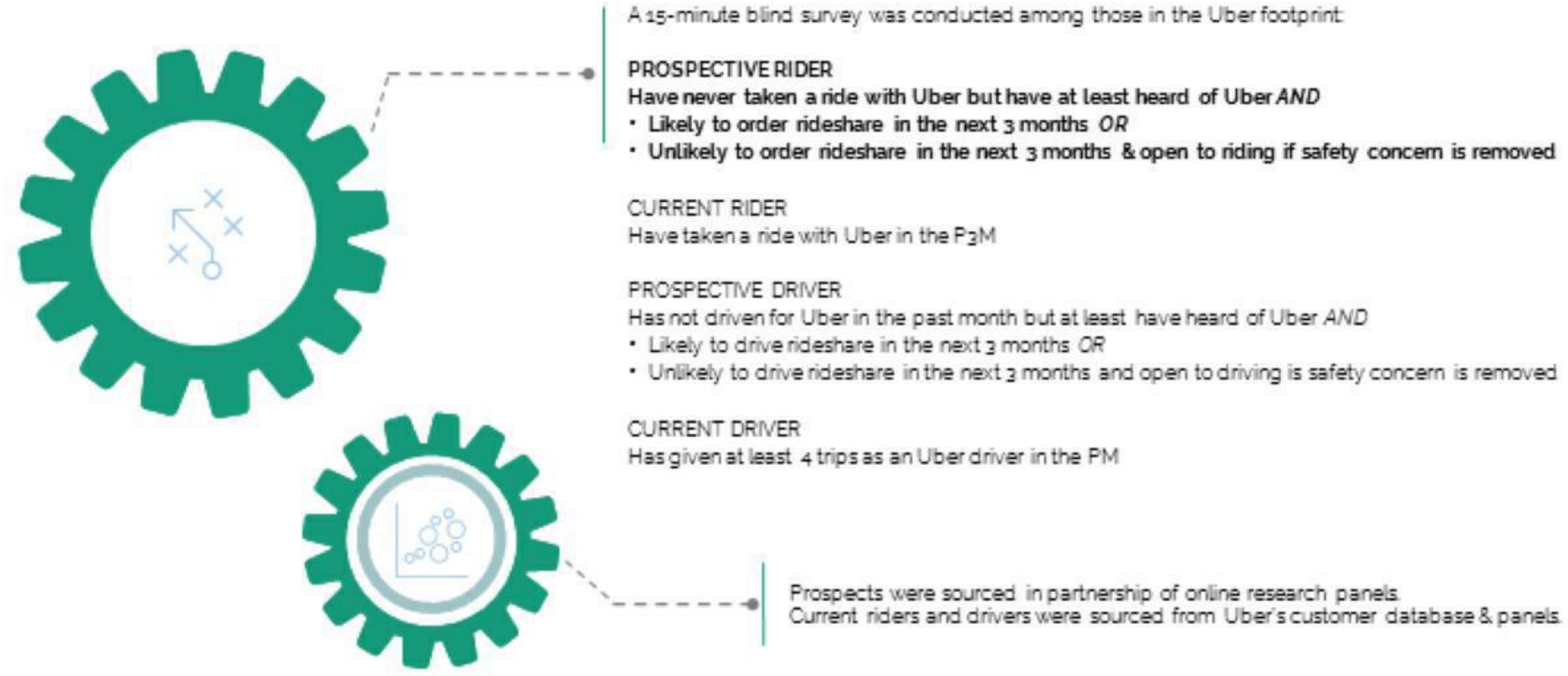
Base: Total Prospective Riders (total)
E1: To the best of your knowledge, how much do each of the companies below do to support the following causes? % among those who indicate 4 or 5, with 5 being 'Does a lot for this cause'.
Asked of Uber, Starbucks, Google, Apple, Tesla, Facebook, and Airbnb.



22

Methodology

We invited survey participants via email to complete an online survey exploring their safety perceptions, needs, concerns, and experiences with Uber and other key competitors.



Links to Other Safety Brand Tracker Decks & Questionnaire

Driver Quantitative Survey Decks

- [Prospect](#)
- [Current](#)

Rider Quantitative Survey Decks

- Prospect
- [Current](#)

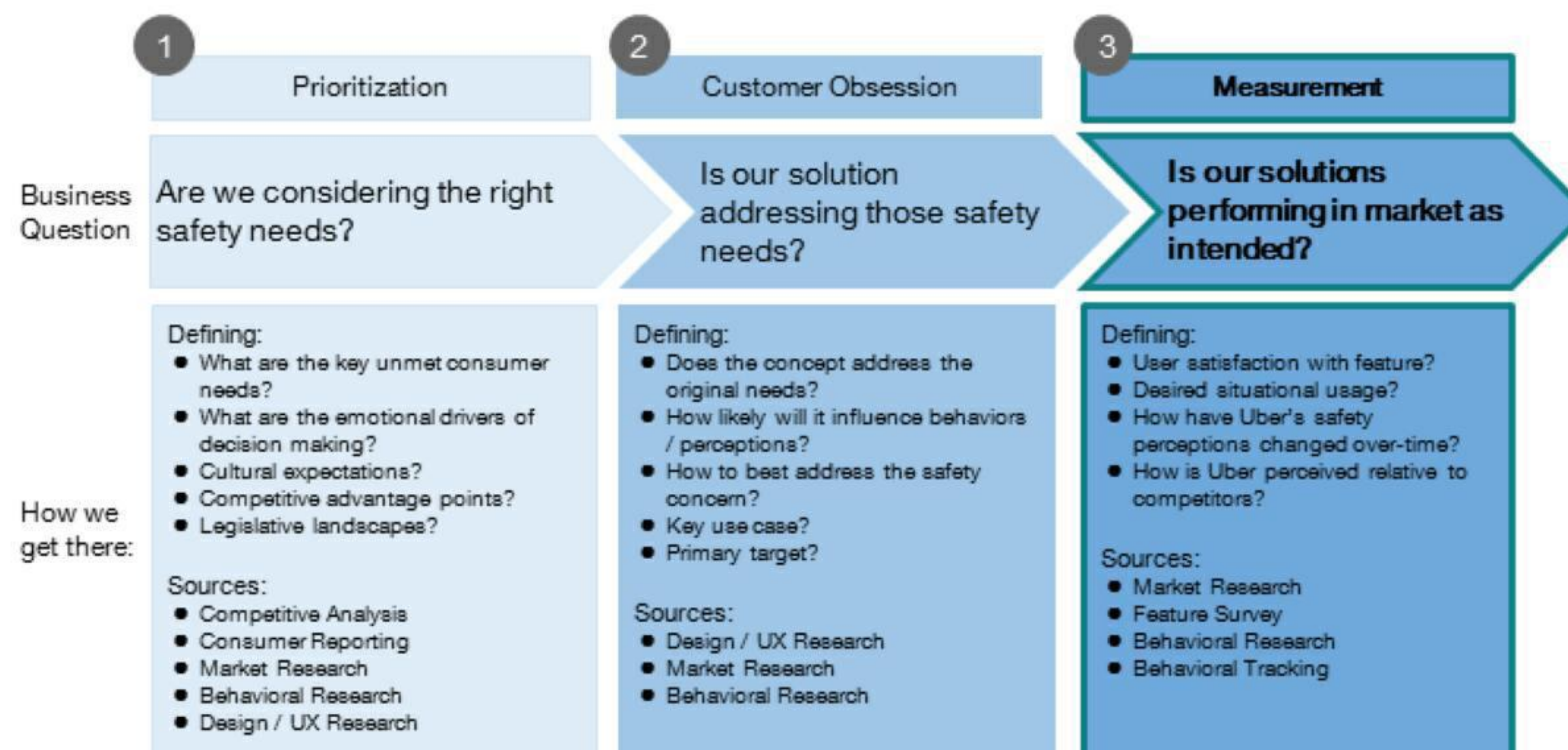
Other

- [US Safety Brand Tracker Questionnaire](#)
- Safety Brand Narrative Website
- Safety Brand Narrative
- Safety Sentiment Framework
- Driver In-app Safety Pulse (WIP)

Q2 2017 Materials

- [Feature Efficacy and Awareness](#)
- Incidence of Incidents
- [Dimension Ratings](#)

We need to inject sentiment into development process



25

Measurement toolkit for implementation centrally / locally

Measuring Safety Sentiment effectively, efficiently and cohesively

	Timing	Audience	Coverage	Competitors	Source	Applications
Reputation Survey	3 times a year - Jan, June, Dec	GenPop, Riders, Drivers, Opinion Elites	Top 14 markets - 90% of Gross Bookings	Yes - by market	3rd party online survey - blind	Safety KPIs only
Safety Sentiment Survey	2 times a year - Apr & Sept	Riders, Drivers, and Prospects (riders and drivers)	Top 8 markets	Yes - by market	3rd party online survey - blind	Category position, strategies, and tactics Prioritization - features and needs
Safety driver in-app survey	Daily	Drivers	Global - city level	N/A	In-app survey - Uber sponsored	Metric sensitivity to market factors Experimentation Sentiment volatility
RSAT (MIF)	Daily	Riders	Global - city level	N/A	In-app survey - Uber sponsored	Metric sensitivity to market factors Experimentation Sentiment volatility
Global Driver Surveys (GDS)	Quarterly / Semi-Annual	Drivers	Global - city level	N/A	Online survey - Uber sponsored	City level benchmarking
Social Listening	Daily	Gen Pop, Opinion Elites	US, UK, MX, RU, IN, ANZ, SG - country level	N/A	Brandwatch - twitter, blogs, forums, FB	Benchmarking - stories, product releases, issues
Digital Marketing Metrics	Metric dependent	Gen Pop	Global - data might vary by country	3rd party benchmarking for selective metrics	Media, email, web, social, etc.	Benchmarking execution efficacy Execution optimization

*Sample source is third party online panel / **Sample source is Uber customer database

28

Segment out what is in the GDS measures sentiment vs. other concepts like inter-personal trust

Add guardrails section of what this cannot provide

Product Efficiency

Quarterly - 3rd party vendor

Run surveys

SP - how consistent or volatile our sentiment is across the driver base

- How strongly do you agree that uber is committed to safety
- Sensitivity to product launches
- Raffi - change questions - satisfaction with 8 pillars for driver forward - Do you feel that Uber is providing safety related features

Relationship

Blind - How we are doing against competitors

Current and Prospective

Overall brand level

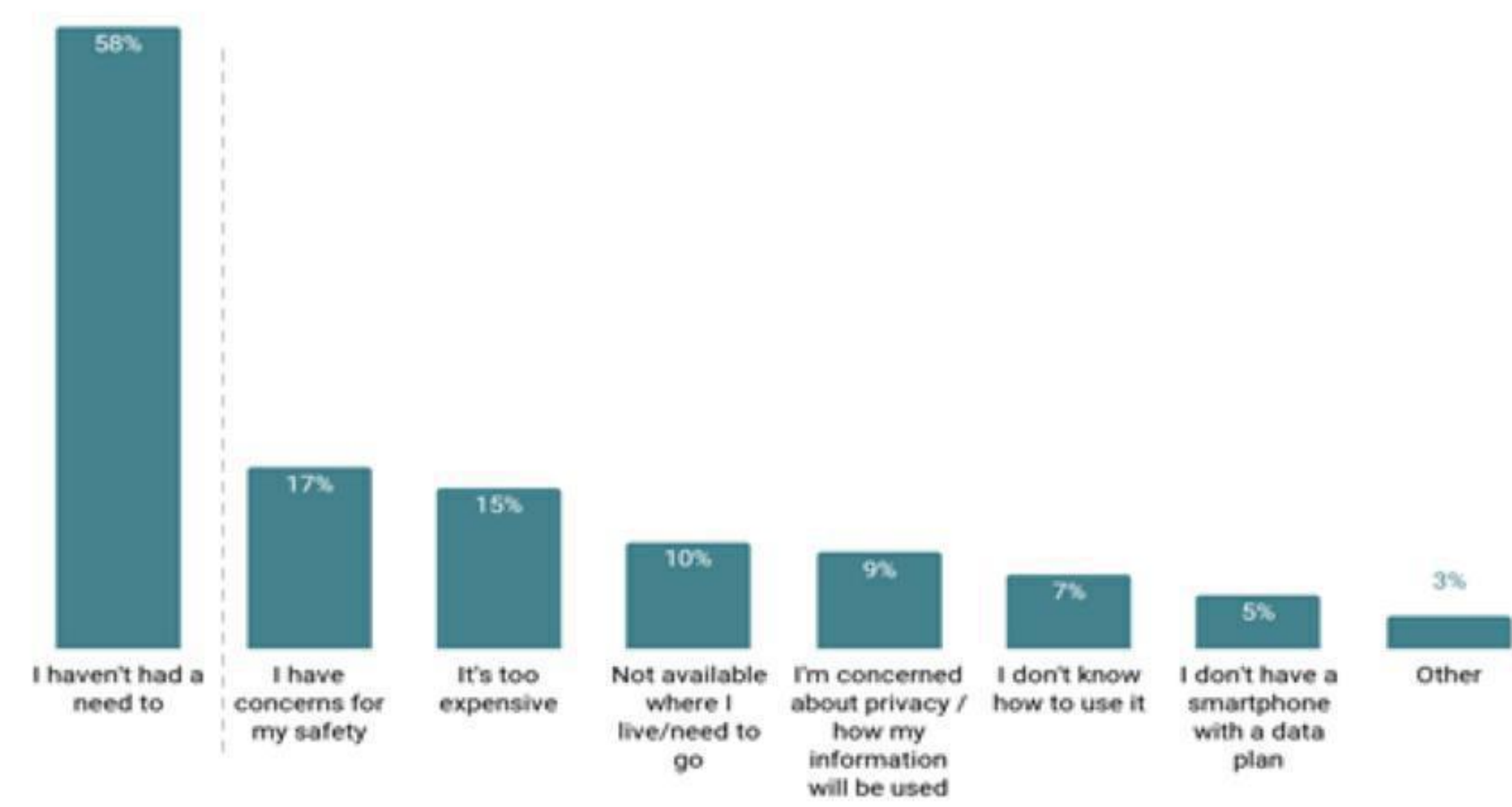
One other

Social Listening

Measure and benchmark and gaining momentum

Safety is the second most common concern for prospects, but most have not used ridesharing because they haven't had a need to

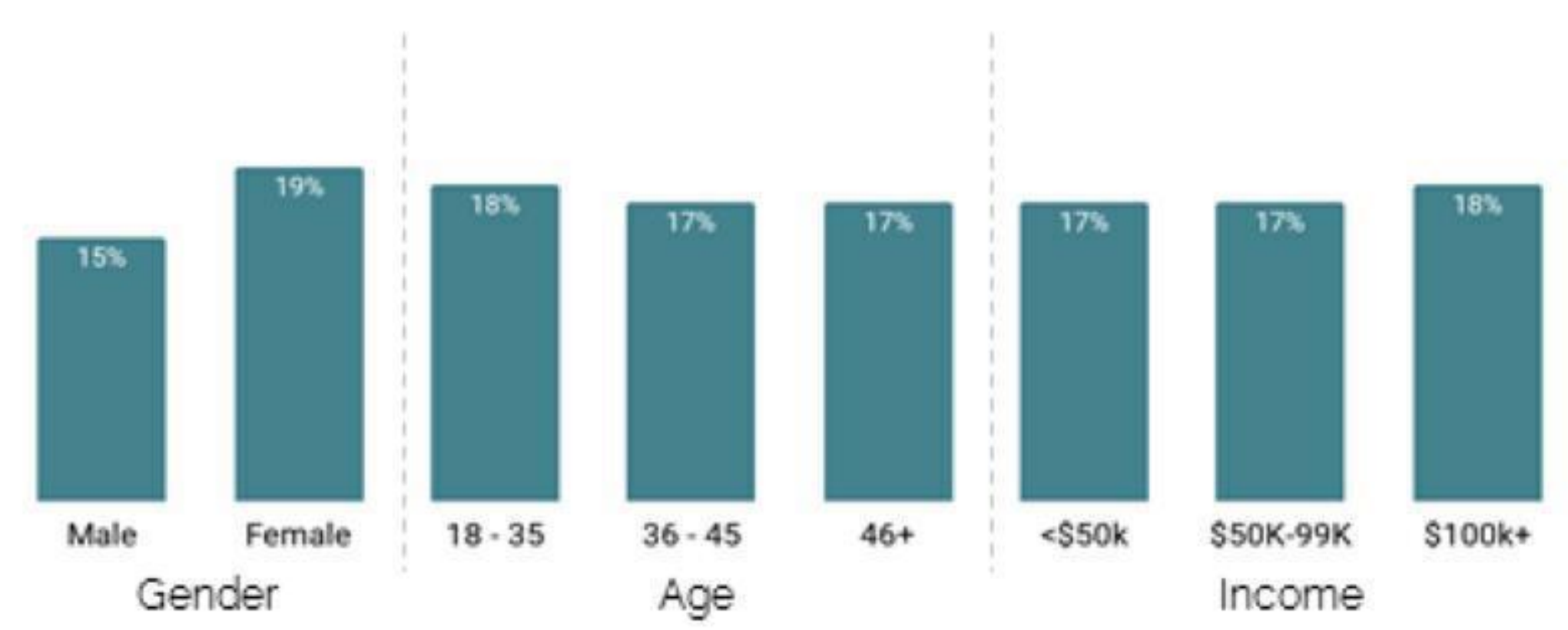
% of Prospective Riders Avoiding Ridesharing due to...



Base: General Population (Equp)
Sig: Which of the following reasons play a role in why you haven't taken a ride with a ridesharing service (e.g. Uber, Lyft, etc.) recently / not likely to take a ride in the future?

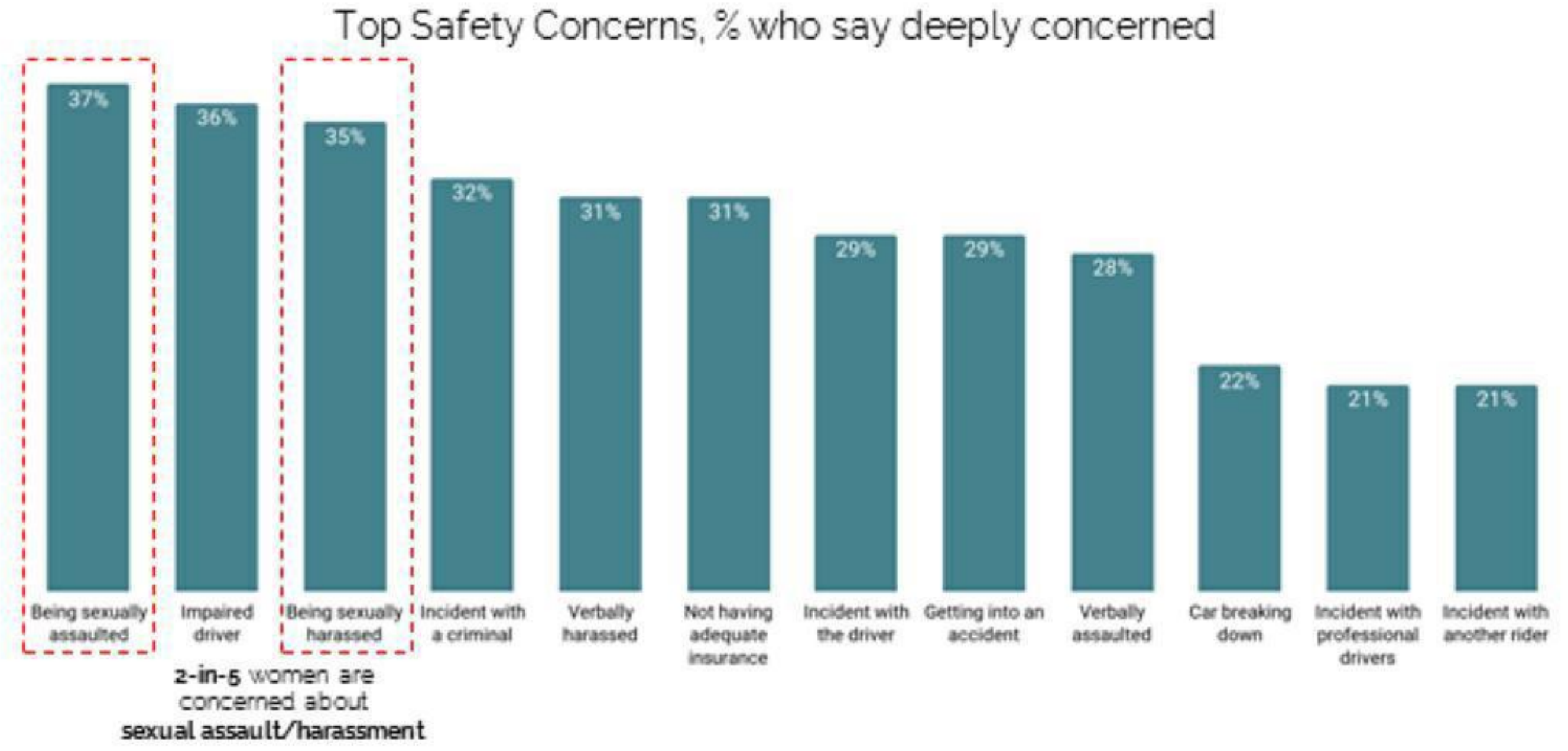
Female, older and lower income passengers are more likely to avoid rideshare due to safety concerns

% of Prospective Riders Avoiding Ridesharing due to Safety Concerns...



Base: General Population (Rapp)
Siz: Which of the following reasons play a role in why you haven't taken a ride with a ridesharing service (e.g. Uber, Lyft, etc.) recently / not likely to take a ride in the future? Sr/Sz/Sa

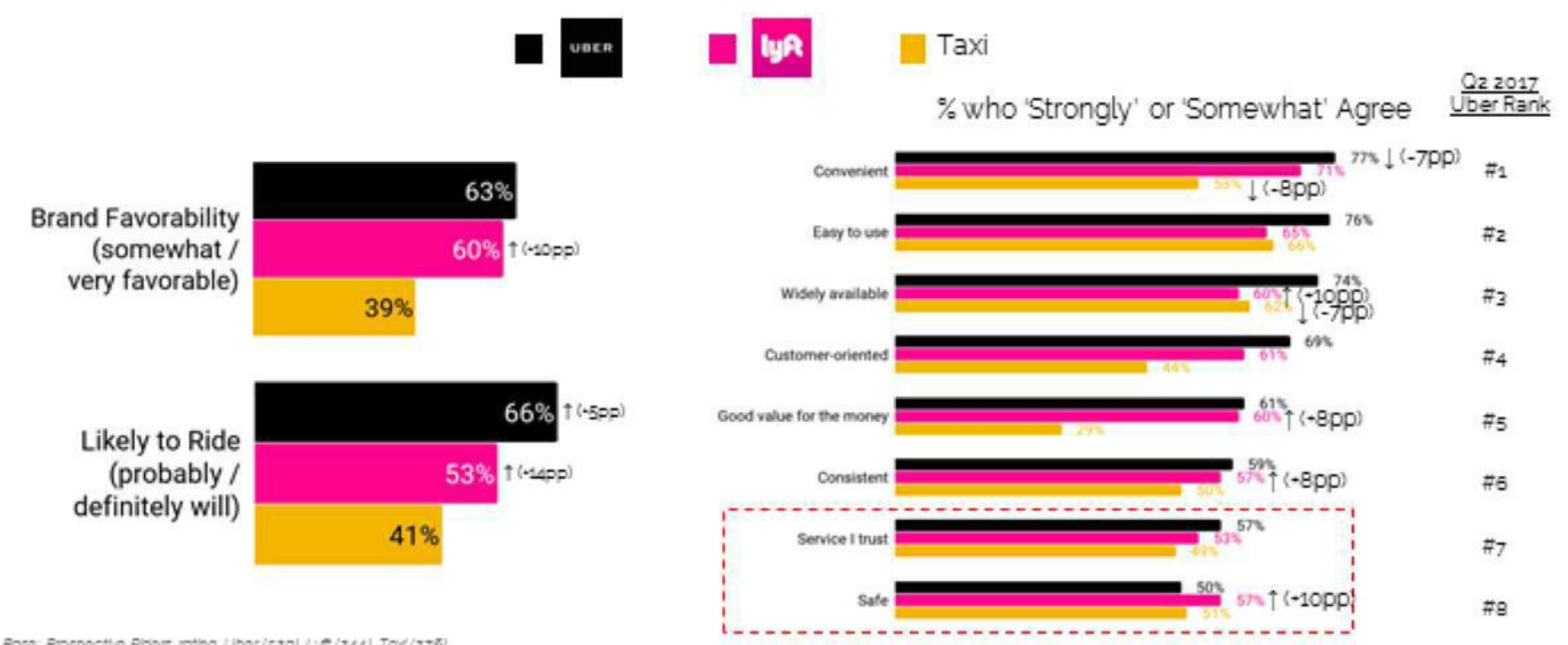
Top safety concerns are around being *sexually assaulted*, *driver being impaired*, and being *sexually harassed*



Base: Prospective Uber Riders (n=201)
Q: How concerned are you about each of following when considering whether to use Uber/Lyft?
% among those who indicate they are 'Deeply Concerned - I have or will avoid taking some trips'

Uber is better known for convenience, ease of use and value, than it is safety

All Prospective Riders

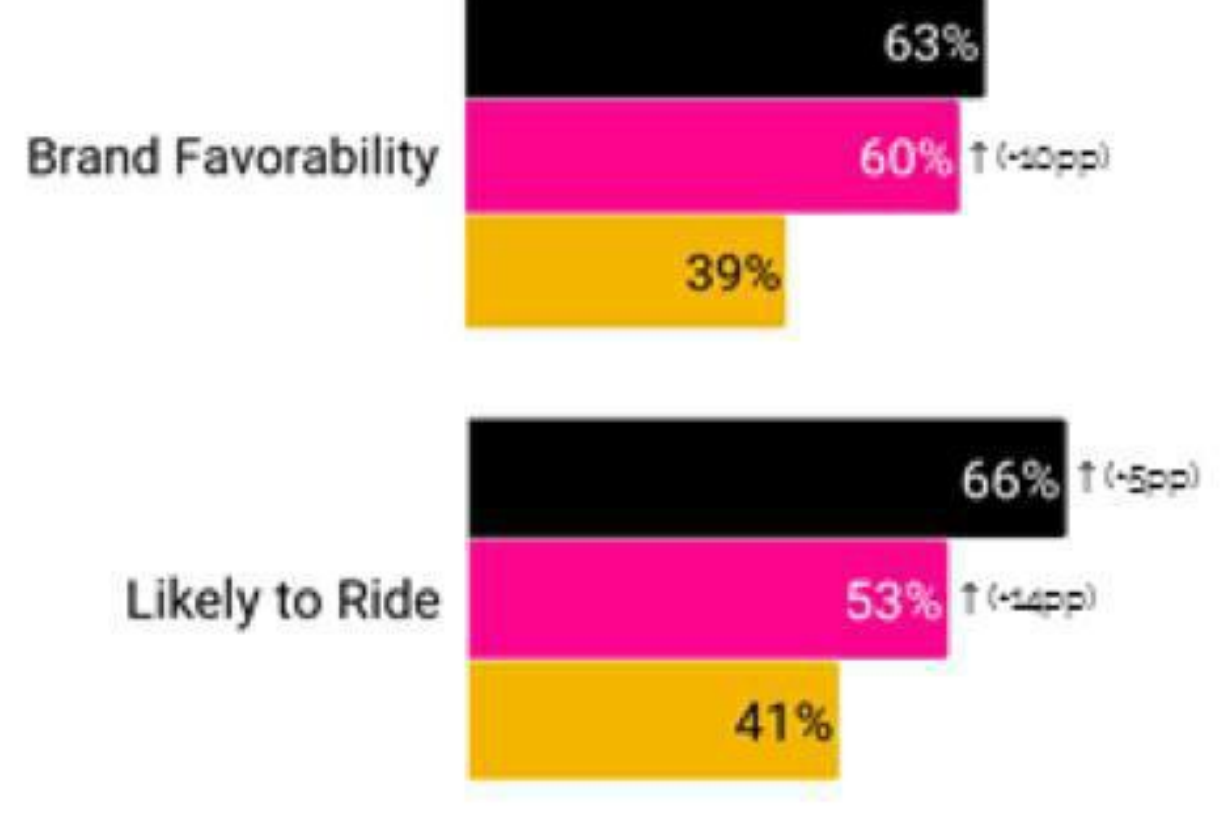


Base: Prospective Riders rating Uber (29%), Lyft (24%), Taxi (27%)
 Q2: How likely are you to take a ride with each of the following services in the next 3 months? B: How favorably do you view each of the following companies?
 B2: Below are a series of statements that can be used to describe transportation services. Please indicate to what extent you agree that each statement describes each service. ↑ indicates score significantly higher/lower than W1 at 95% CI.

Uber is better known for convenience, ease of use and value, than it is safety

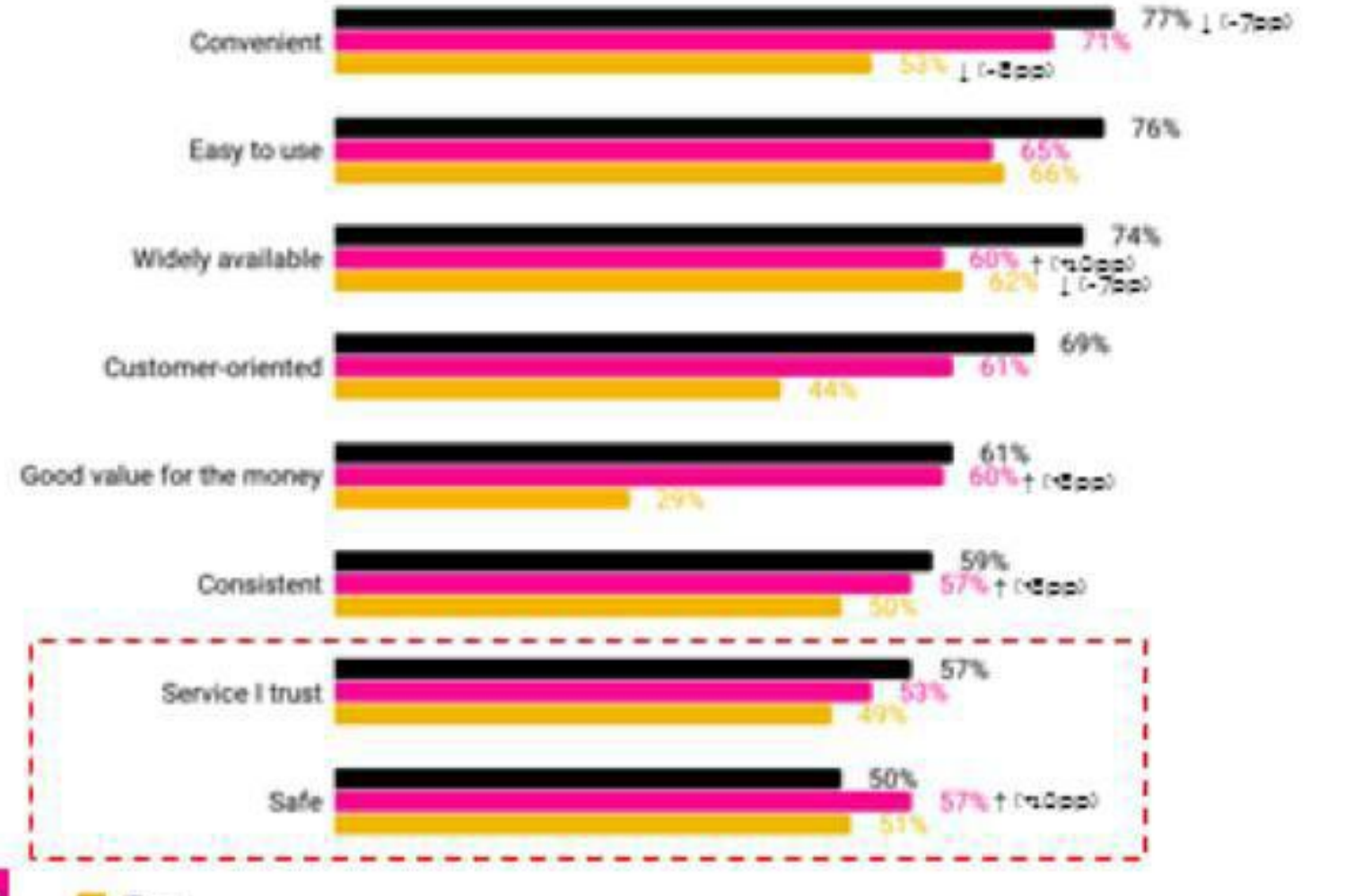
Brand Favorability & Likelihood to Ride

% of somewhat/very favorable & probably/definitely will take a ride
Among all prospective riders



Other Brand Attributes

% who 'Strongly' or 'Somewhat' Agree
Among all prospective riders

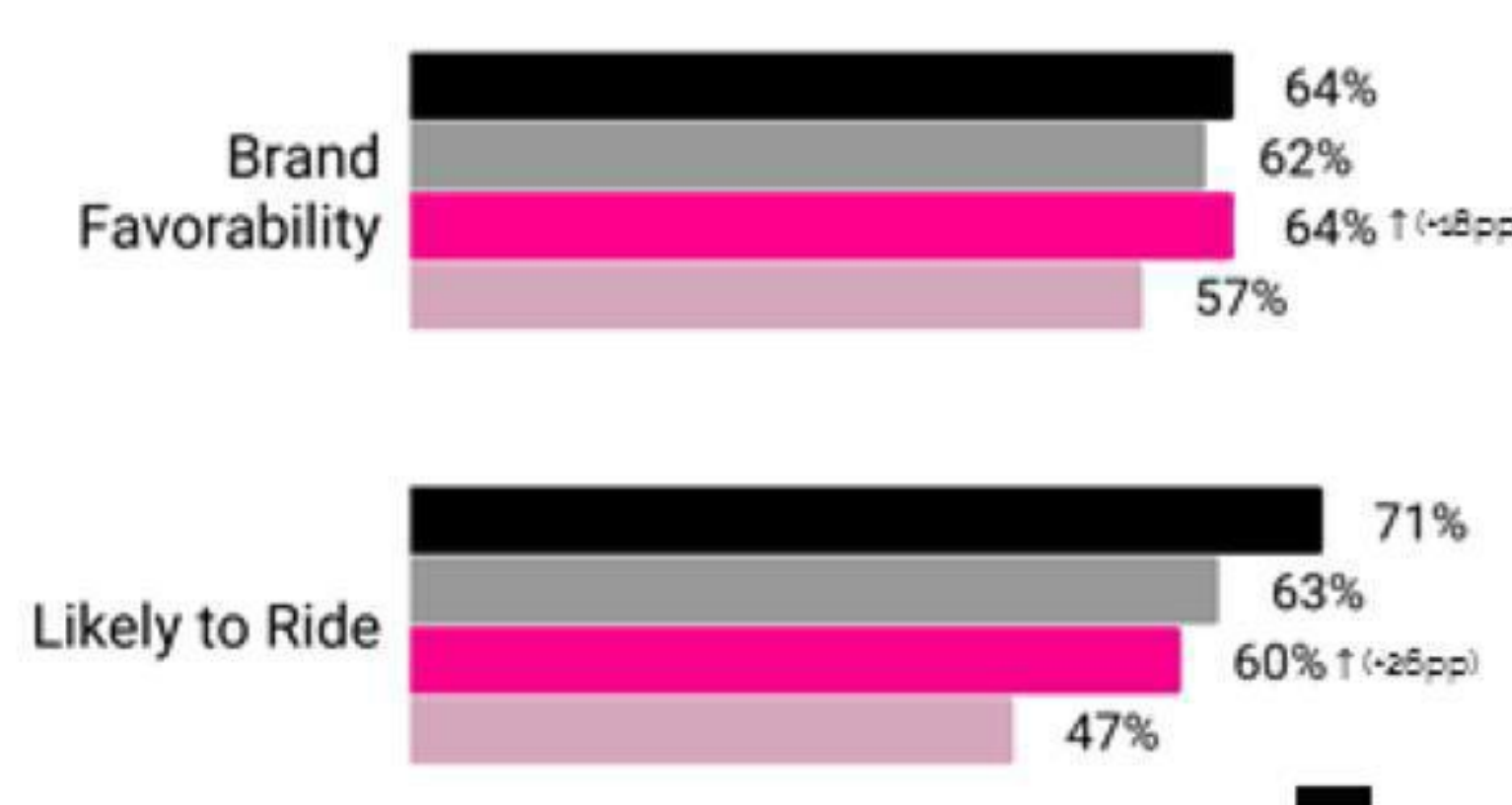


Base: Prospective Riders rating Uber (29%), Lyft (24%), Taxi (27%)
 Q1a: How likely are you to take a ride with each of the following services in the next 3 months? Q1b: How favorably do you view each of the following companies?
 Q2: Below are a series of statements that can be used to describe transportation services. Please indicate to what extent you agree that each statement describes each service. ↑ indicates score significantly higher/lower than W1 at 95% CI.

Women believe Lyft does better on consistency, trust, and safety

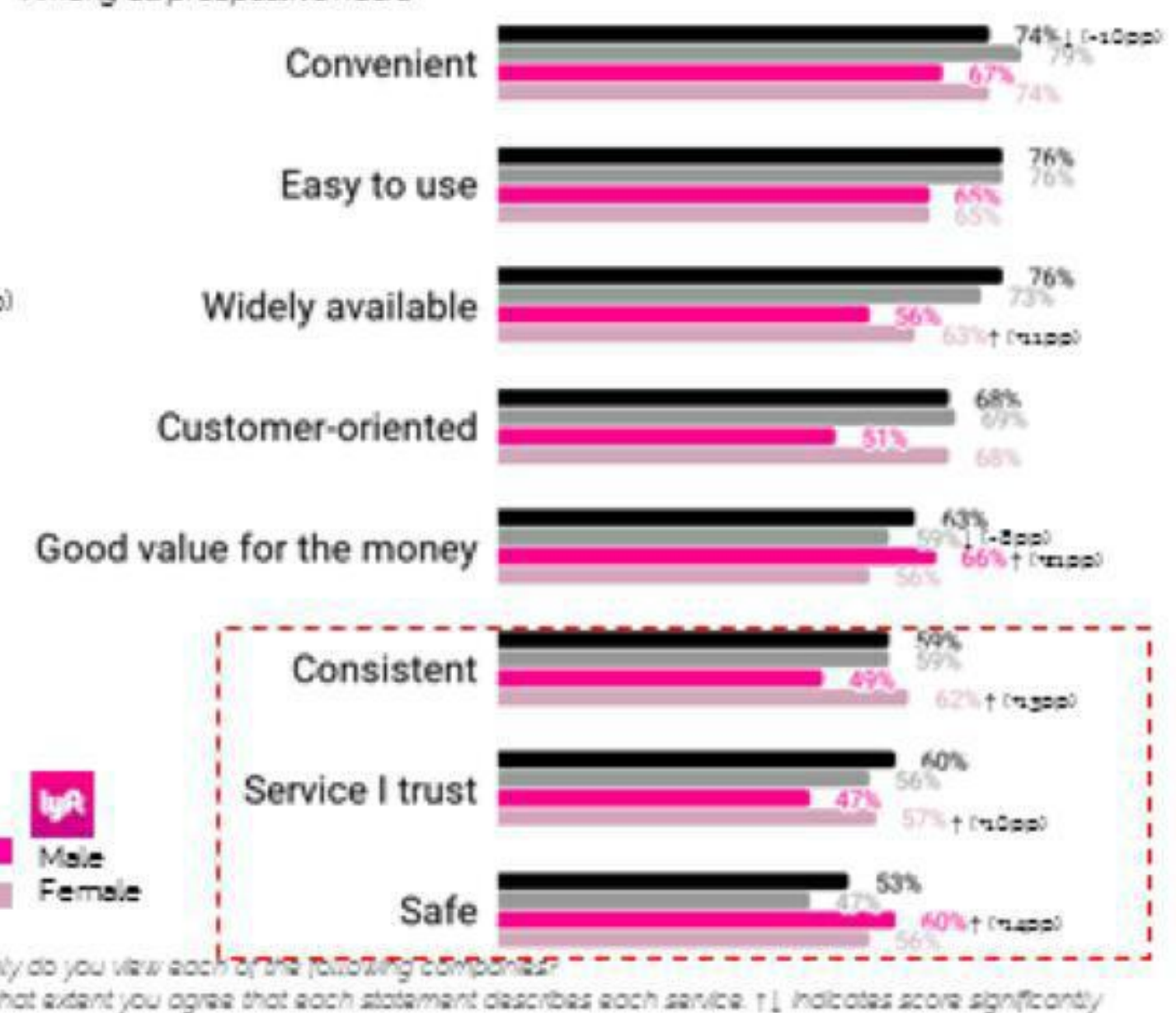
Brand Favorability & Likelihood to Ride

% of somewhat/very favorable & probably/definitely will take a ride
Among all prospective riders



Other Brand Attributes

% who 'Strongly' or 'Somewhat' Agree
Among all prospective riders



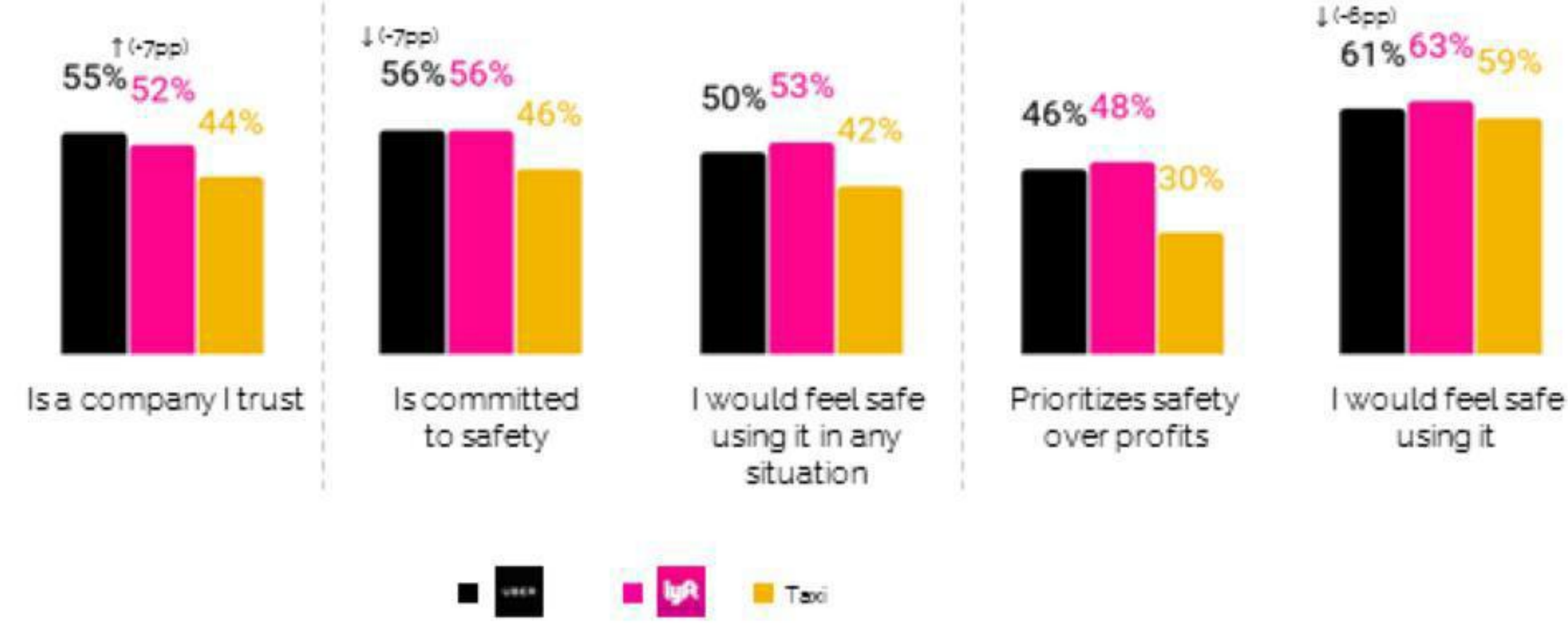
Base: Prospective Riders rating Uber (Male 1259 / Female 195) / Lyft (Male 116 / Female 126)
 †: How likely are you to take a ride with each of the following services in the next 3 months? ‡: How favorably do you view each of the following brands?
 †: Below are a series of statements that can be used to describe transportation services. Please indicate to what extent you agree that each statement describes each service. †: Indicates score significantly higher/lower than W1 at 90% CI.

Uber differentiates from Lyft only on 'trust'

Prospective Riders

Safety KPIs

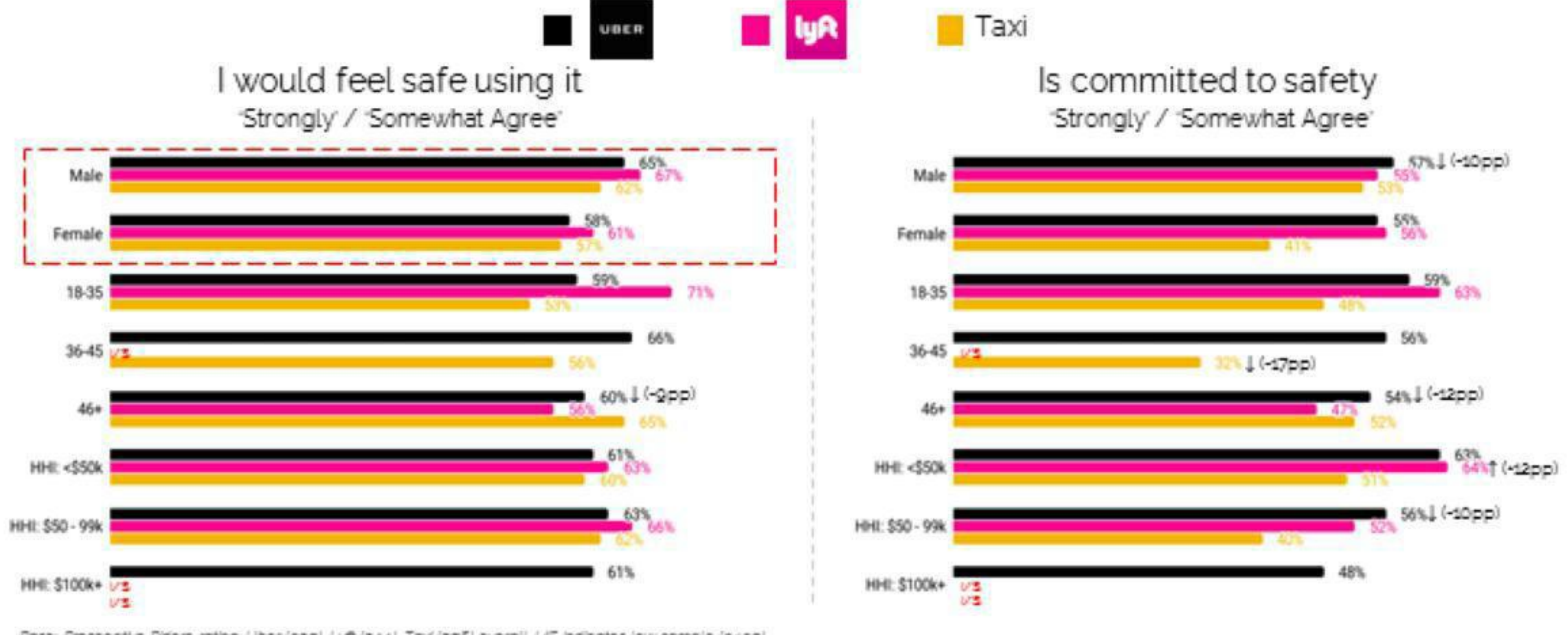
% of who 'Strongly' or 'Somewhat Agree' among prospective riders



Base: Prospective Riders rating Uber (n=20), Lyft (n=44), Taxi (n=7)
 SE: How much do you agree with each of the following? SE: Thinking about everything you have heard, read, or experienced with each transportation service as a rider, how much do you agree with the following statements? I would feel safe using it in any situation and Prioritizes safety over profits not asked in W2 1; indicates score significantly higher/lower than W2 at p<0.05.

Men would feel safer using Uber than women, but women do believe rideshare is safer than taxis

Among Prospective Riders



Base: Prospective Riders rating Uber (36%), Lyft (24%), Taxi (40%) overall. U/S indicates low sample (<150).
 SD: Thinking about everything you have heard, read or experienced with each transportation service as a rider, how much do you agree with the following statements? ↑ indicates score significantly higher/lower than W2 at 90% C.I.

2

please take out taxi, clean up the formatting - see current driver/rider deck

Abbie Ding, 12/29/2017

There continues to be a greater unease with getting in a car with a stranger and driving safety than cyber safety concerns

Note: Data collected prior to announcement of break on November 21st



Base: Prospective Riders rating Uber (n=201), Lyft (n=244), Taxi (n=276)
BB: Thinking about everything you have heard, read, or experienced with each transportation service as a rider, how much do you agree with the following statements? (1) indicates score significantly higher/lower than Wt. at p<0.05.

Prospect riders generally are not aware of programs and policies that exist should something go wrong

Performance Needs, among Prospective Riders

Women tend to have lower awareness of Uber features



Uber's weakest performing attributes in Wz shown. Base: Prospective Riders rating Uber (20), assigned Lyft (24).
 C: Based on what you have heard, read or experienced, how would you rate the transportation service(s) as a rider, on each of the following?
 Bar may not sum to 100% due to rounding. † indicates score significantly higher/lower than Wz at 90% C.

Prospective Riders

Women, older riders, and those who have used taxis recently would feel safer with additional features

% Prospective Riders who say 'Makes me feel a lot safer'

	Total	Male	Female	18-35	36-45	46+	Have not used Taxi in P3M	Used Taxi in P3M
<u>New feature:</u> Emergency button	72%	68%	75%	69%	73%	73%	72%	70%
Criminal screening	71%	67%	74%	67%	69%	76%	71%	71%
Driving screening	67%	60%	72%	65%	66%	69%	68%	64%
Driver / car information	64%	53%	65%	61%	65%	66%	62%	70%
<u>New feature:</u> Safe pick-ups/drop-offs	61%	57%	63%	59%	57%	64%	61%	59%
24/7 customer support	60%	62% † (+1000)	60%	63% † (+1000)	60%	59%	58%	66%
Rider insurance	60%	58%	61%	59%	58%	61%	58%	64%
Community guidelines	58%	53%	62%	59%	55%	60%	58%	59%
Driver selfie	58%	54%	60%	55%	59%	59%	56%	62%
<u>Limited feature:</u> Driver hour limits	58% † (+900)	58% † (+1300)	58%	54% † (+1000)	51%	64% † (+1200)	58%	61%
Rider share trip	56%	55%	57% † (+800)	52%	59%	57%	56%	57%
Driving feedback	53% † (-600)	47%	57% † (+800)	52%	57%	51%	51%	57%
Phone anonymization	42%	36%	45%	45%	38%	42%	43%	39%

† † indicates score significantly higher/lower than W2 at 90% CI. Used taxi in P3M not available in W2

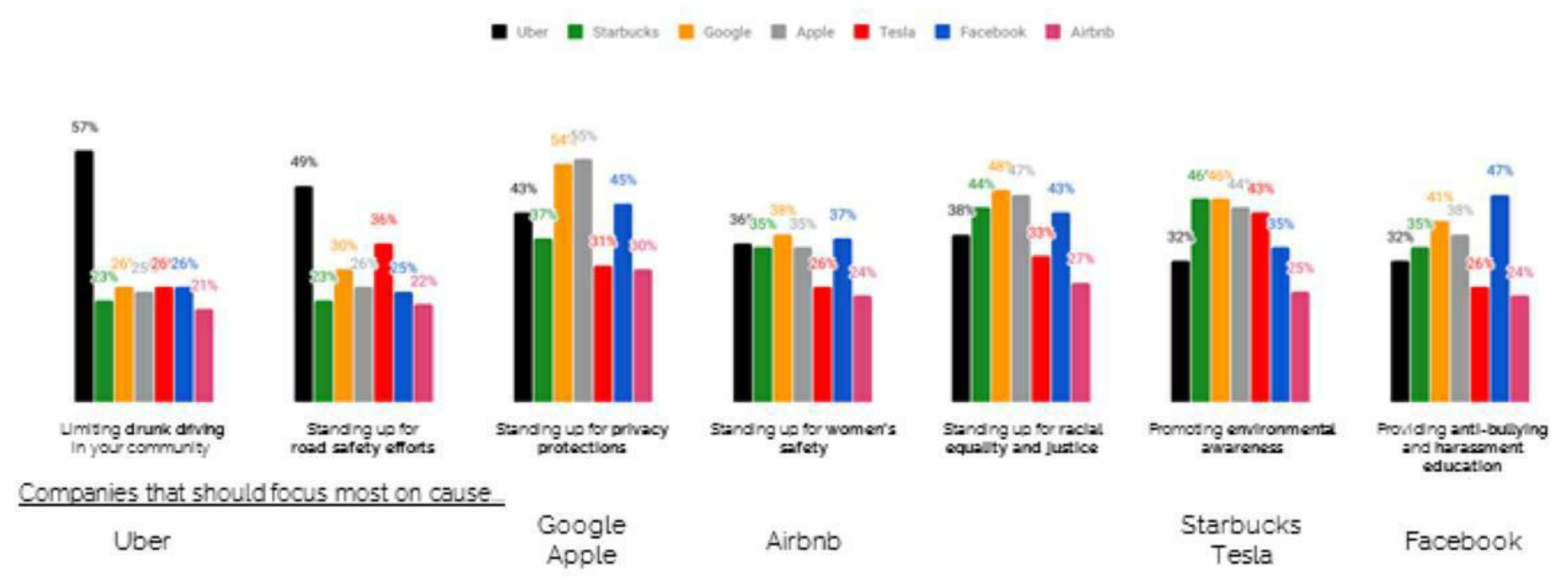
- **Criminal screening:** Criminal background screening of drivers including to screen out drivers who have felonies, or misdemeanors from joining the app.
- **Emergency button:** Riders or drivers could activate an emergency button in the app to call local authorities and provide vehicle details and GPS location. send car make, model, color, license plate, driver name and phone number, and exact location using GPS.
- **Driving screening:** Motor vehicle background screening of drivers including to screen out drivers who have speeding violations over 20 mph, DUIs, and reckless driving incidents.
- **Driver / car information:** Driver picture, car type, and license plate number are provided to riders in the app when they order a car.
- **Safe pick-ups/drop-offs:** The app will help riders and drivers avoid pick-up and drop-offs in known dangerous zones such as designated taxi or bus zones or places where drivers are more likely to encounter violence.
- **Driver selfie:** Drivers take a selfie that is verified against their picture on file to ensure that only registered drivers can pick-up riders.
- **24/7 customer support:** Customer Support 24/7, an emergency response phone number, and an Incident Response Team dedicated to investigating any incidents that occur.
- **Driver hour limits:** Limits drivers from driving more than 12 hours before requiring a break of at least 6 hours.
- **Rider Insurance:** Each ride covered by a \$1 million commercial liability insurance covering bodily injury and property damage to you or third party involved in the incident.
- **Community guidelines:** Published driver and rider behavior policies against things

like driver drug and alcohol use, open containers of alcohol for riders, weapons, and smoking.

- **Rider share trip:** Rider share trip, click a link in the app, so you can share your GPS location, as well as the car and driver information with a friend or loved one. \
- **Driving feedback (Delphina):** Speeding, braking, and phone handling is recorded for each trip using the driver's smartphone movement. This feedback is provided to drivers via a daily report.
- **Phone anonymization:** When calling a rider or driver, phone number anonymization hides the driver's and rider's real phone numbers.

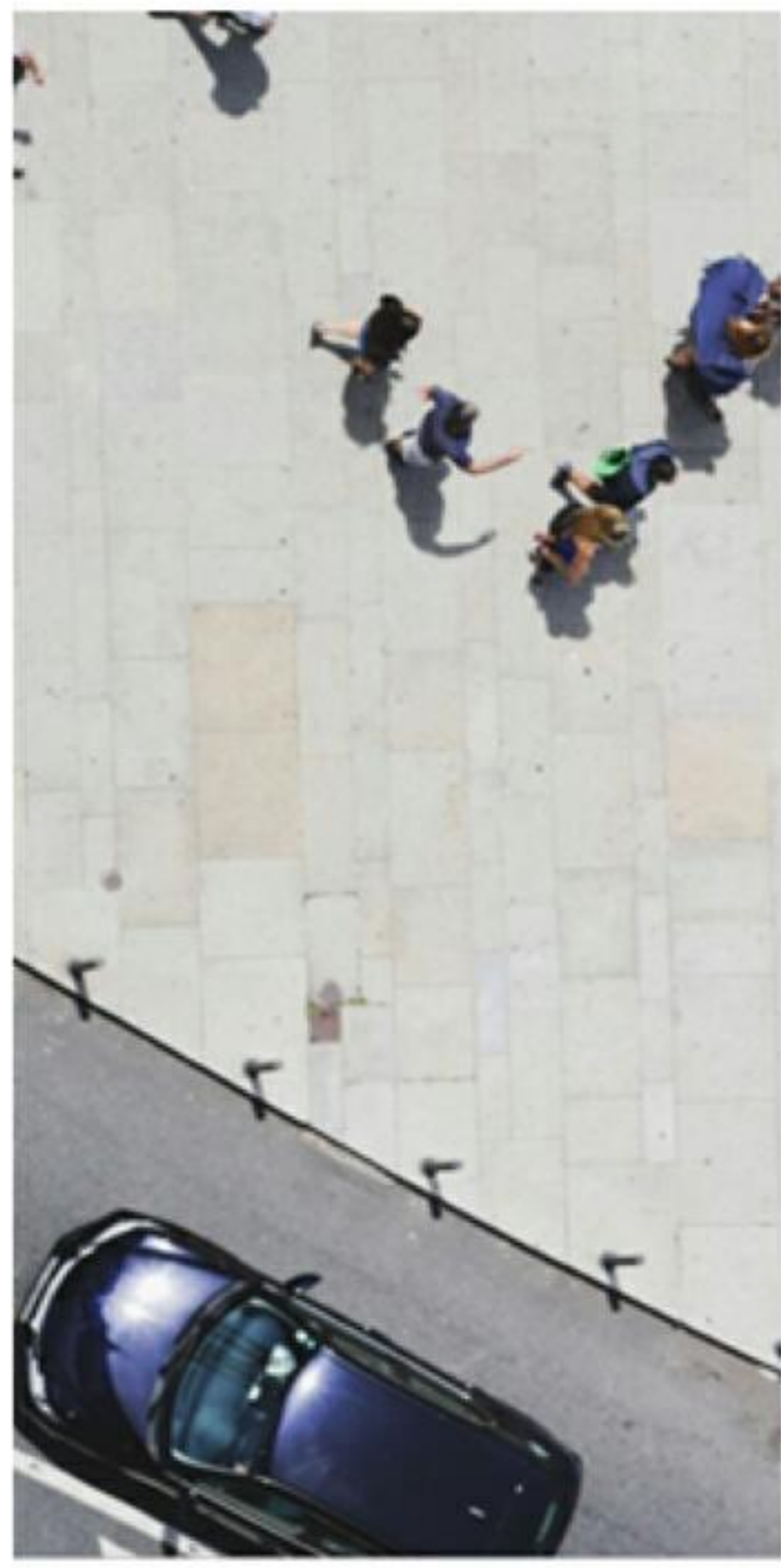
Although Prospective riders do not ride Uber, about 1-in-2 feel that Uber does a lot to support driving causes

% indicating 4 or 5, with 5 being company 'does a lot for this cause'



Companies that should focus most on cause:

Base: Total Prospective Riders (n=20)
 E1: To the best of your knowledge, how much do each of the companies below do to support the following causes? % among those who indicate 4 or 5, with 5 being 'Does a lot for this cause'.
 E2: Thinking of those same causes, please choose the one that you think each company should focus on the most.



The following report highlights the key findings among U.S. **Prospective Riders**.

It is a part of the **Safety Brand Tracker** — a roadmap that enables understanding for how each part of our business impacts safety and can align efforts for maximum impact in every city.

Based on the qualitative work of the Safety Brand Narrative, we know that trust and safety matters, and how it can be operationalized.

Now, using quantitative findings, we understand:

- The business opportunity safety presents
- Uber's competitive positioning on safety sentiment
- And how to prioritize products, programs, and policies

Quarter-to-quarter comparisons are shown where applicable. Trending information not available (two waves of data collected to date. We intend to collect two additional waves in 2018.)

Australia, Brazil, India, and Mexico were added in Q4 2017.

[U.S. Safety Brand Tracker Questionnaire](#)

| 39

3

Hollis to add language about how this is one input into Safety Sentiment Framework

Travis Rind, 12/19/2017

PROSPECTIVE US RIDERS: Executive Summary

After accounting for those who claim to have no need for rideshare, **Safety is the top barrier to trial among Prospective Riders**, with 8% of the general population saying they avoid rideshare due to safety concerns.

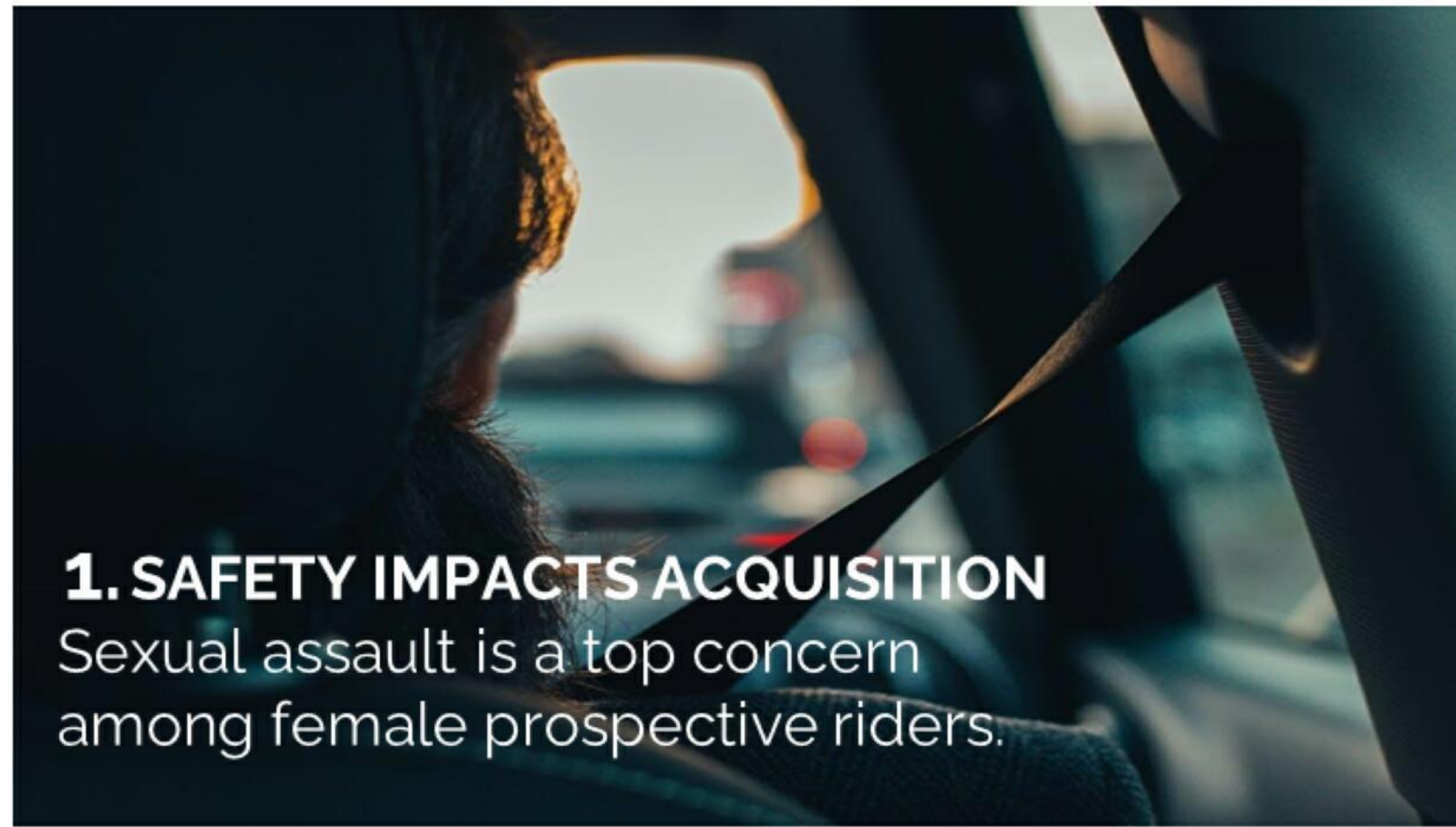
Over *half* of Prospective Riders are deeply concerned about experiencing an issue that threatens their safety while using rideshare. **Sexual assault/harassment** were the top overall concerns among **women**, while an **impaired driver** is a top concern for men.

Compared with 'Ease of Use', 'Convenience' and other key brand attributes, **Uber's performance on 'Safety' is relatively weaker, and not well differentiated from Lyft or Taxis** (though Uber is perceived as being safer than the latter).

While Prospective Riders are generally aware of more basic features like trip monitoring and the feedback system, they are much **less familiar with options available to them in the event an incident does occur**. Similar to overall safety perceptions, Uber is not differentiated from Lyft on Safety feature and policies, in the minds of Prospective Riders. Increasing awareness of these features would improve overall safety perceptions.

While Uber is seen as doing more for causes like Drunk Driving, no other major tech company has laid claim to **Women's Safety** as a cause, creating a potential opportunity for Uber.

| 40



1. SAFETY IMPACTS ACQUISITION

Sexual assault is a top concern among female prospective riders.

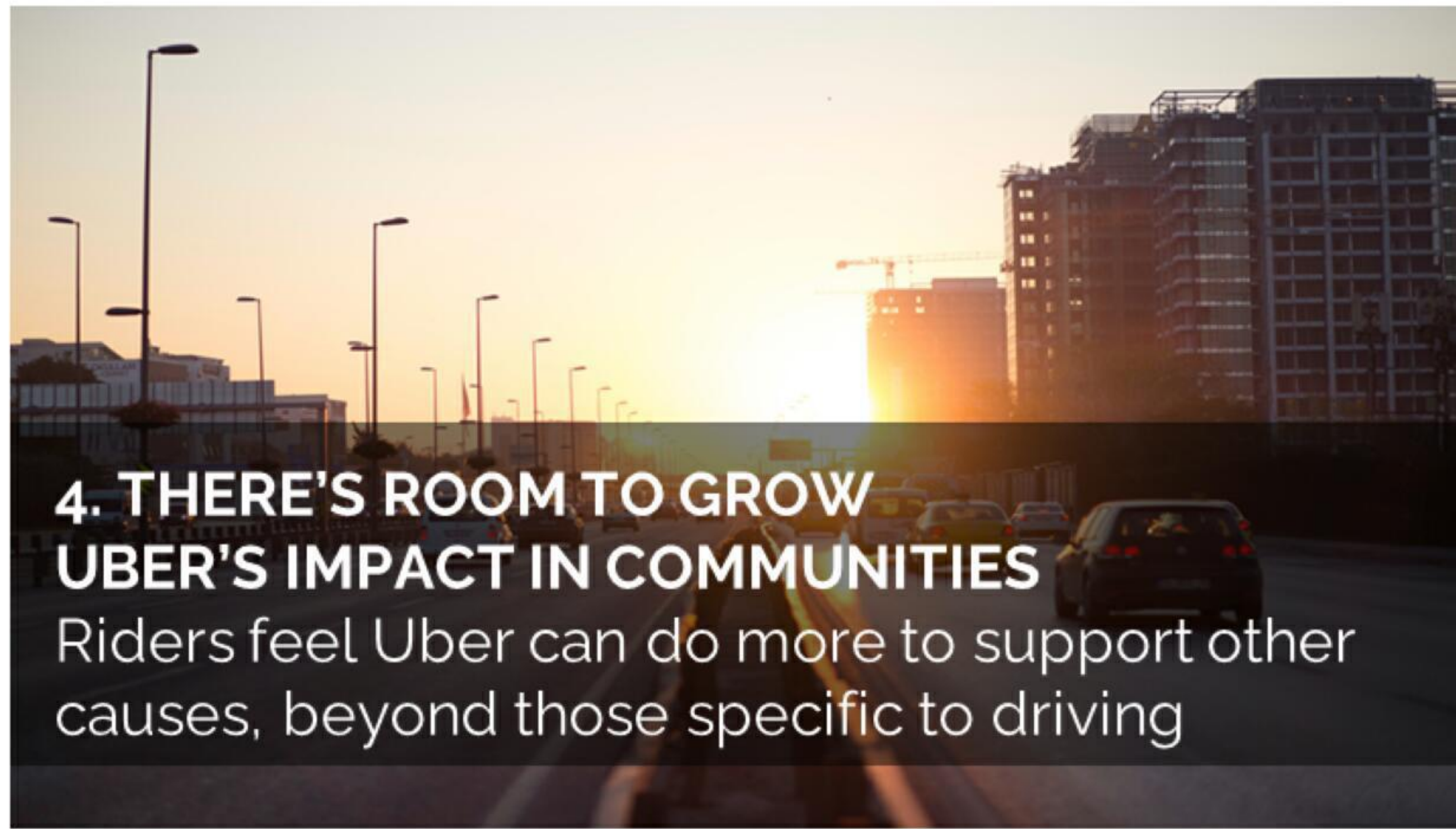


**2. UBER DOES NOT
DIFFERENTIATE ON
SAFETY**

But neither do
competitors,
presenting an
opportunity.

42





4. THERE'S ROOM TO GROW

UBER'S IMPACT IN COMMUNITIES

Riders feel Uber can do more to support other causes, beyond those specific to driving