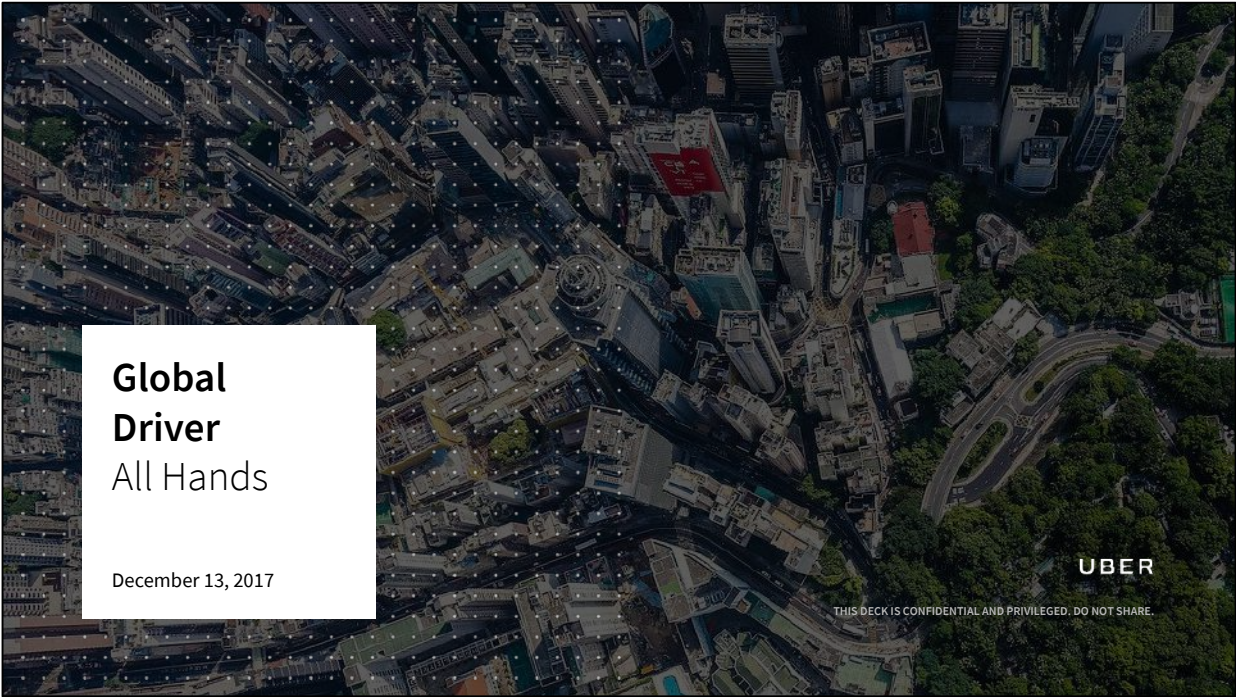


## UBER\_JCCP\_MDL\_003405397

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#Date Modified	06/10/2018	SEMANTIC
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#Title	Global Driver All Hands (12/13)	SEMANTIC
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Trial Exhibit No.  
**P-00176**



**Global  
Driver  
All Hands**

December 13, 2017

**UBER**

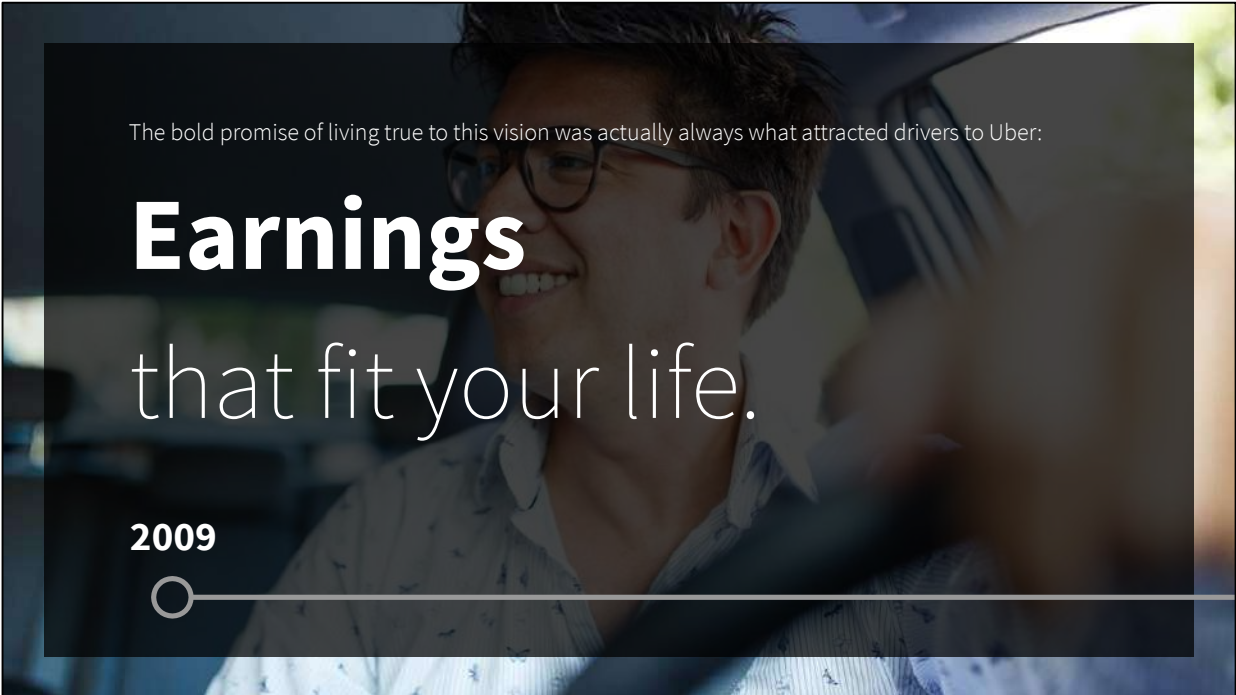
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**slido.com:**  
#globaldriver

# **Vision** & History

DRIVER VISION

Uber is the  
world's favorite  
**flexible**  
**earnings**  
**opportunity**



The bold promise of living true to this vision was actually always what attracted drivers to Uber:

# Earnings

that fit your life.

**2009**





# For years, **GROWTH** > **everything else**

Rider demand was rampant.

Capital was cheap.

“Supply” was our constraint.

**We met demand through aggressive spending on driver acquisition  
and existing driver incentives to maximize hours.**



# Driver satisfaction **declined.**

The drivers we were able to attract expected higher earnings than the opportunities we could profitably offer.

We neglected the basics of the driver experience.

**We failed to honor loyalty with loyalty.**



We spent heavily on “supply”  
to **maintain growth...**

Loss-making pricing and incentives

Low-ROI acquisition spend

High insurance & support costs

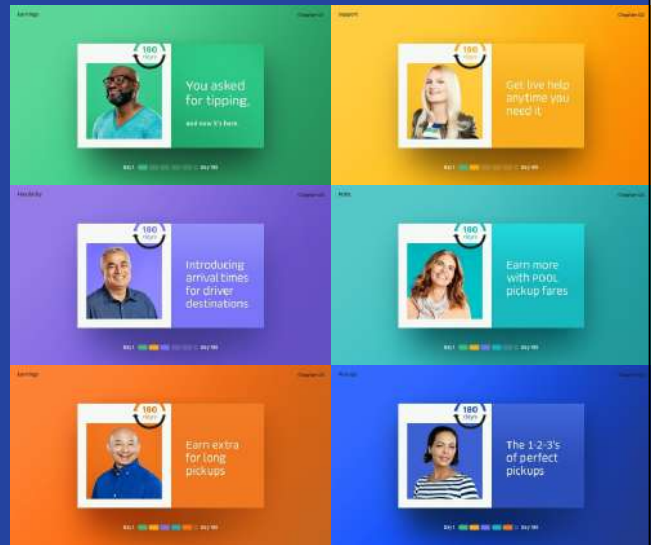
**But growth and spend wasn't enough to cover  
the system debt we'd built up and driver sentiment,  
engagement, and costs continued to reflect this.**

# 2017 was a year of **listening and change.**

As driver sentiment declined, and the brand slipped into crisis, we shifted focus strongly to improving our relationship with our existing drivers.

# We shipped **180 DAYS OF CHANGE**

Our goal was to improve favorability  
and trust among existing drivers.  
**We played catch-up on their basic requests.**



>6% Lift in US Driver Sentiment Since Launch



But despite our significant  
2017 improvements,  
**the underlying driver  
system debt remains a  
threat and opportunity  
for our business.**

Enter...

# Driver Forward, 2018

the global cross - organizational / functional system  
through which we'll execute our 2018 Driver Strategy.

In 2018 our task is to move beyond 2017's pure focus on driver sentiment to build and strengthen the system that offers enduring opportunity to millions of drivers around the world.

# **3 core tenets of** FORWARD

**1. Customer-centric**

**2. Strategic**

**3. As One**

This work - it sound so simple but the three things we did that we at scale, orienting across the customer, strategy genuinely based in insights, and operating as an fully customer based organization

# Driver Forward 2018 Steering Committee



**Andrew Macdonald**  
VP RGM LATAM & APAC



**Rachel Holt**  
VP RGM US&C



**Manik Gupta**  
Sr. Director, Product



**Billy Guernier**  
Head of Central Ops, US&C



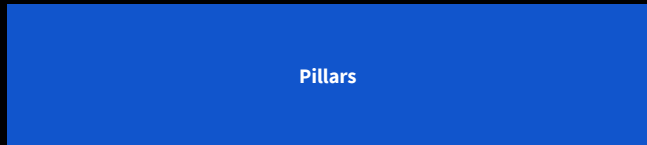
**Tom Fallows**  
Director, Product

+++  
*Full Steering  
Committee to be  
finalized by EOY*

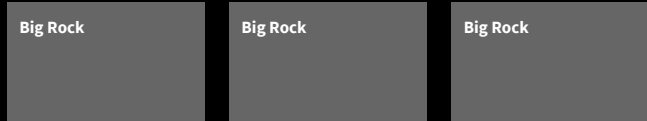
Ushering in a new year - key additions - Mac (Global) and Manik (marketplace)  
- cross functional - we'll keep adding right folks

# How we organize...

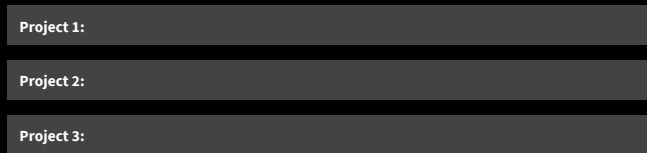
## Pillars



## Big Rocks



## Projects



Old news, oriented around pillars, big rocks, projects

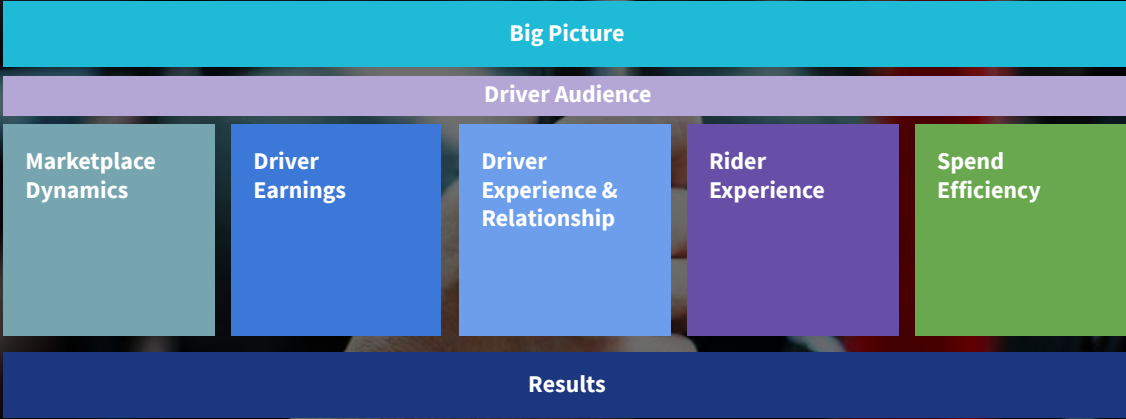
# Strategic Organization...



Continuation of what we did last year, focusing on insights, strategy, leading to planning and execution

# Insights

# Our 2018 strategy is grounded in insights:



INSIGHTS

STRATEGY

PLANNING

EXECUTION



INSIGHTS

# Big Picture

INSIGHTS

STRATEGY

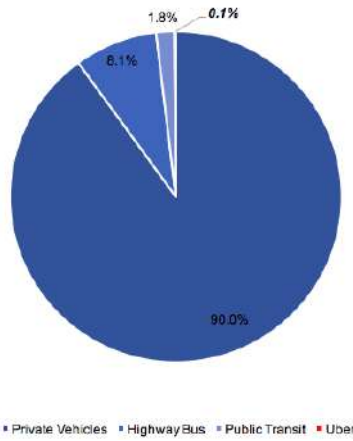
PLANNING

EXECUTION

Big Picture: Room to Grow

**We still provide only a tiny percent of the world's overall vehicle trips.**

Composition of Passenger Miles by Road Transportation Mode



INSIGHTS

STRATEGY

PLANNING

EXECUTION

Big Picture: Room to Grow

**Uber has already built what may be the largest workforce on earth.**

And yet, we've just begun. The global **demand for a truly flexible earnings opportunity is virtually unlimited**—particularly if it doesn't require a car.

3.26M

Active Drivers in Last 28 Days

(+ >90M signups who haven't never taken a first trip)

INSIGHTS

STRATEGY

PLANNING

EXECUTION

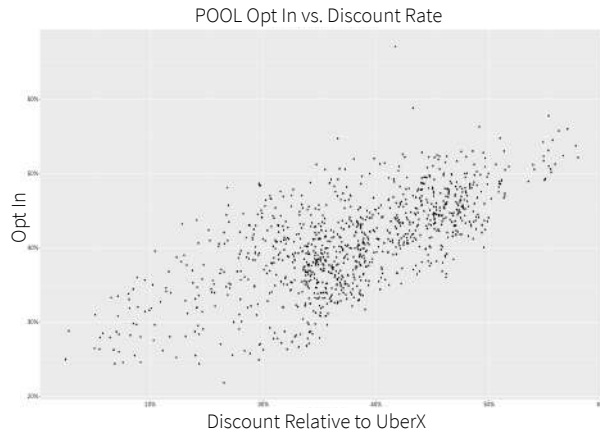
91M signups in funnel.. Some duplicative and have other challenges.  
Very very large part of population is somewhere in our funnel and needs our help solving structural challenges to begin driving.  
Even today takes a while to begin earning -- e.g., in SF it's 3 weeks, in licensed markets it's even higher  
Many blockers - vehicle ownership, document knowledge & acquisition challenges, regs stuff, unbanked, nervousness pre FT

Big Picture: What Matters

**Lowering trip price  
has been the primary  
way we grow,  
historically.**

However, our ability to do this on  
UberX is relatively limited.

**Shared rides is by far our most  
compelling near-term bet to  
unlock the next wave of growth.**



INSIGHTS

STRATEGY

PLANNING

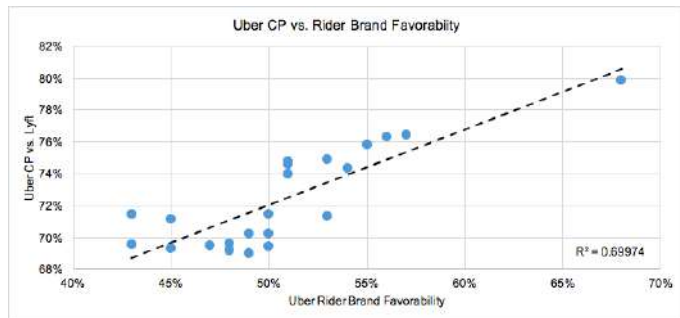
EXECUTION

Big Picture: What Matters

**Brand matters. A lot.  
Particularly when the  
product is not  
differentiated.**

We have the opportunity to tell  
a true turnaround story.

**Drivers are our moral compass.**



INSIGHTS

STRATEGY

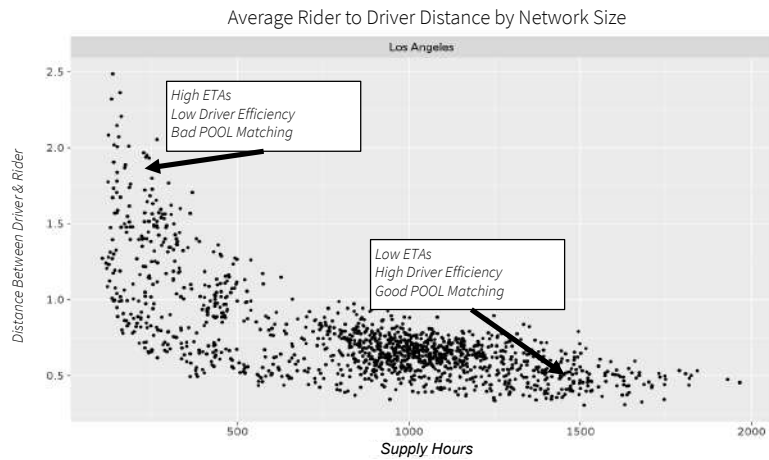
PLANNING

EXECUTION

Big Picture: What Matters

**Relative Scale  
is our primary  
competitive  
advantage.**

**Category Position  
(CP) matters.**



INSIGHTS

STRATEGY

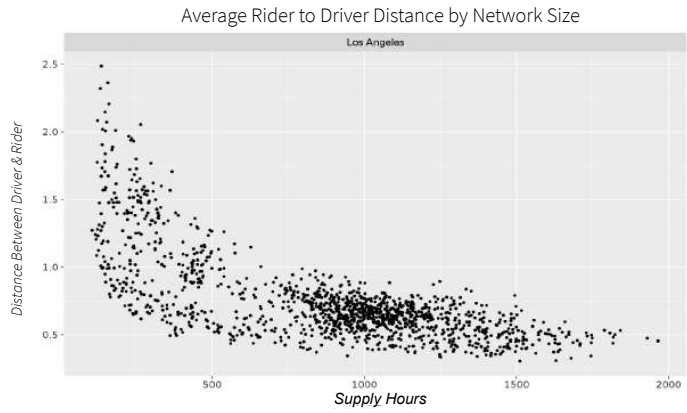
PLANNING

EXECUTION

**Big Picture: What Matters**

**Why does CP matter?**

Category position is the percentage of trips taken on the Uber platform over the total addressable market by geography.



INSIGHTS

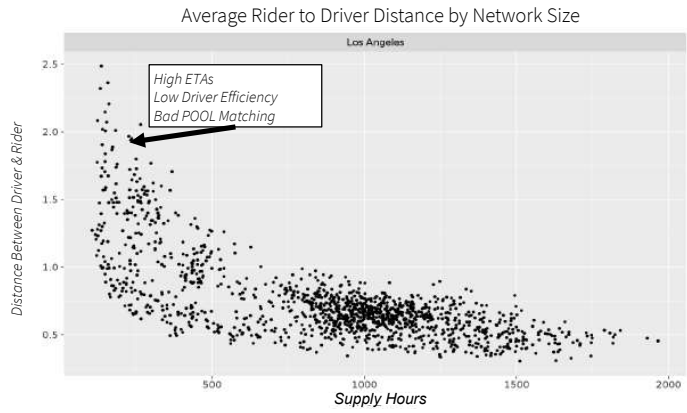
STRATEGY

PLANNING

EXECUTION

Big Picture: What Matters

## Why does CP matter?



INSIGHTS

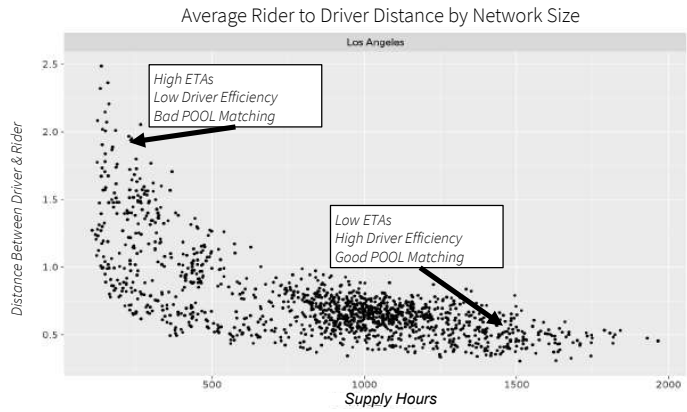
STRATEGY

PLANNING

EXECUTION

Big Picture: What Matters

## Why does CP matter?



INSIGHTS

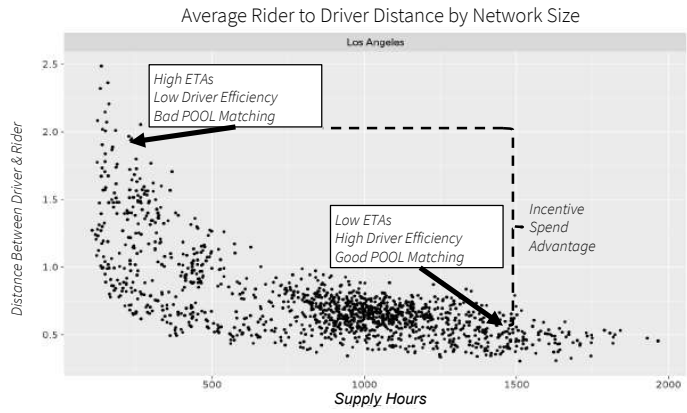
STRATEGY

PLANNING

EXECUTION

Big Picture: What Matters

## Why does CP matter?



INSIGHTS

STRATEGY

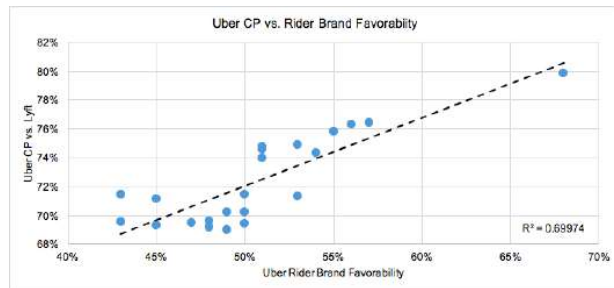
PLANNING

EXECUTION

Big Picture: What Matters

**When you combine weakness on the fundamentals with brand degradation you get a potentially catastrophic cycle of CP loss.**

When fewer drivers are on the platform, ETAs and ETDs rise across the system—giving riders reasons to try another service. And without rider demand, drivers go elsewhere. We have seen this very clearly in the US.



INSIGHTS

STRATEGY

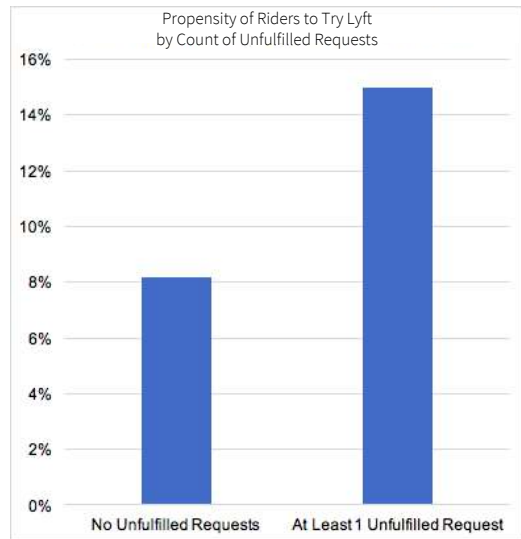
PLANNING

EXECUTION

**Big Picture: Core Truths**

## **Well-funded competition is here to stay.**

When riders have bad experiences, they are more likely to switch—even if these experiences only happen occasionally (p90+). **We must partner with drivers to improve network quality, consistently and at the extremes,** to ensure riders don't have a reason to switch.



INSIGHTS

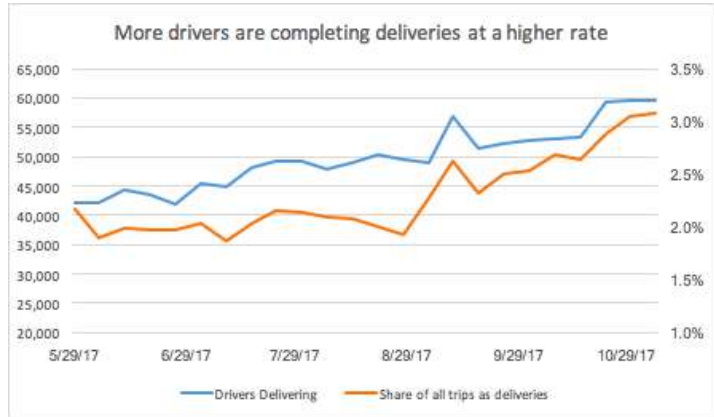
STRATEGY

PLANNING

EXECUTION

Big Picture: Core Truths

**UberEats is for real.**



INSIGHTS

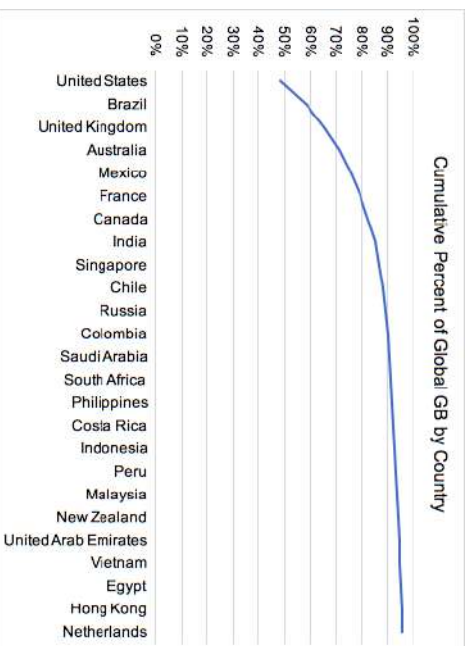
STRATEGY

PLANNING

EXECUTION

Big Picture: Core Truths

**We serve a truly global driver base with unique international use cases (though the US remains our crown jewel.)**



INSIGHTS

STRATEGY

PLANNING

EXECUTION

Big Picture: Core Truths

**We are committed to our  
open, independent  
contractor model.**



INSIGHTS

STRATEGY

PLANNING

EXECUTION

INSIGHTS

# Driver Audience

INSIGHTS

STRATEGY

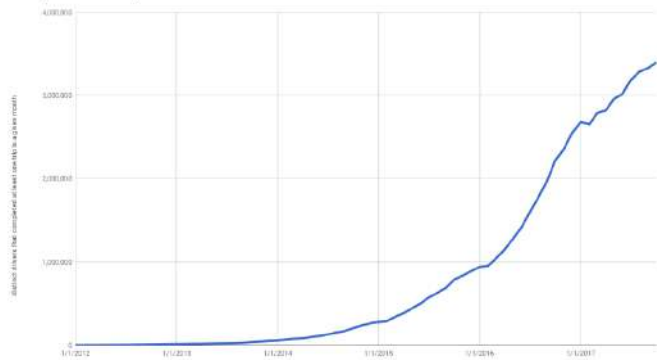
PLANNING

EXECUTION

Driver Audience

**We have over 3 million active drivers and 91 million signed-up prospects across the globe.**

Monthly Active Drivers Globally



INSIGHTS

STRATEGY

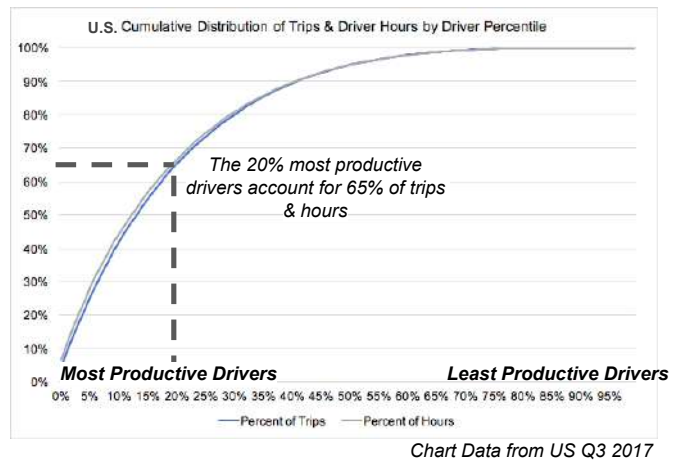
PLANNING

EXECUTION

91M signups in funnel.. Some duplicative and have other challenges. Very very large part of population is somewhere in our funnel and needs our help solving structural challenges to begin driving. Even today takes a while to begin earning -- e.g., in SF it's 3 weeks, in licensed markets it's even higher. Many blockers - vehicle ownership, document knowledge & acquisition challenges, regs stuff, unbanked, nervousness pre FT

Driver Audience

**Driver productivity is highly concentrated. Specific segments of drivers provide the bulk of drivers hours.**



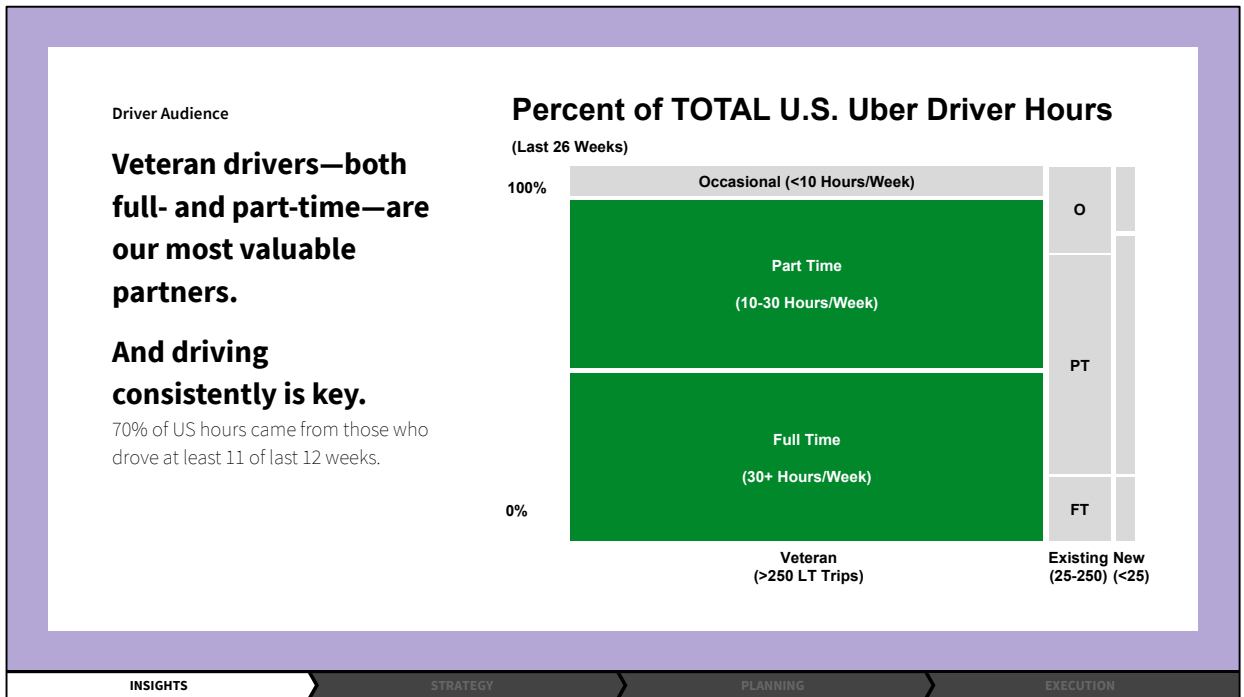
INSIGHTS

STRATEGY

PLANNING

EXECUTION

This holds across most geographies  
This is a critical insight that we should all bear in mind as we think about prioritization of resourcing (product, investment, support, everything)  
Then a key question is who are these folks?



82% of hours supplied by Veteran drivers

Note that consistency is the most critical piece here.. Part time and Full Time, once consistent, contribute equal parts of this 82%

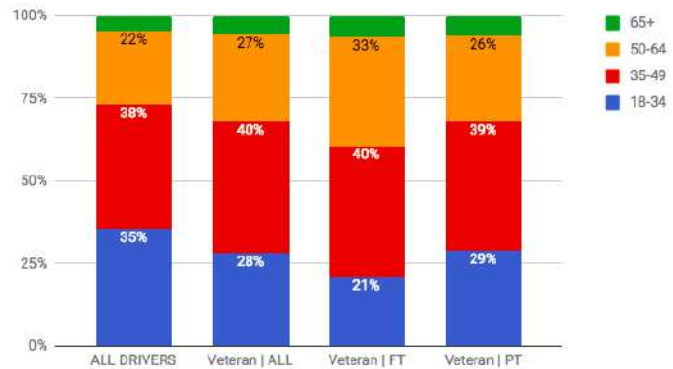
As an example, if you look at the last 12 weeks in the US, 70% of hrs are being contributed by drivers that drove atleast 11 of the 12 weeks

Our #1 priority is ensuring we are able to retain these drivers and win their loyalty; after that comes driving higher engagement from other folks and moving ppl through funnel etc.

Driver Audience

**In the US, our most productive driver demographic is 35-64 year old men who reside in cities or suburbs and earn between \$25k and \$75k per year.**

% Drivers by age group



INSIGHTS

STRATEGY

PLANNING

EXECUTION

Drive significantly more during weekdays than all drivers

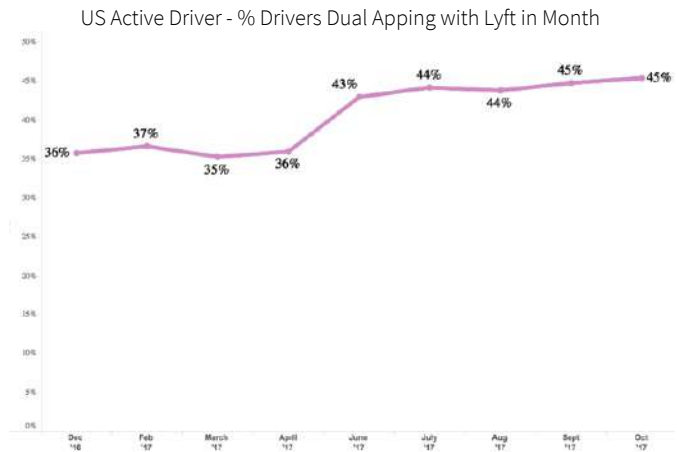
These drivers are much more consistent than the average driver

While the majority in the US are Caucasian, these drivers are actually more diverse than the US population.

And we attract a higher representation of African American females than their US demographic proportion.

Driver Audience

**46% of drivers typically drive on at least one other ridesharing platform, and these drivers are among our most productive.**



INSIGHTS

STRATEGY

PLANNING

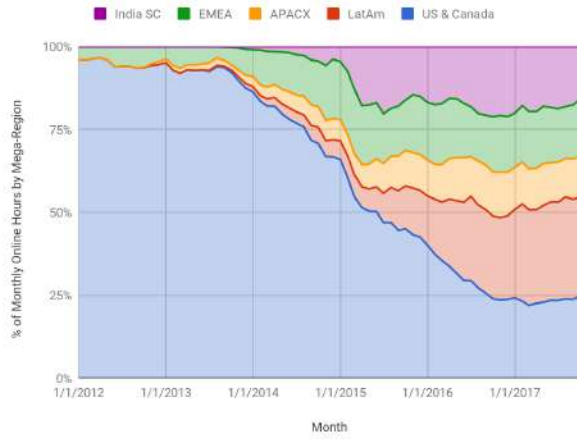
EXECUTION

This trend is pretty applicable globally.. If we look at our CP across most global markets we are losing CP, which inherently implies that more of our customers are dual apping (exception: India)

Driver Audience

**Fewer than 30% of our global hours are in the US. The rest of the world has unique barriers to driving— financial and consumer technology, licensing, vehicle ownership, and safety.**

% of Monthly Online Hours by Mega-Region



INSIGHTS

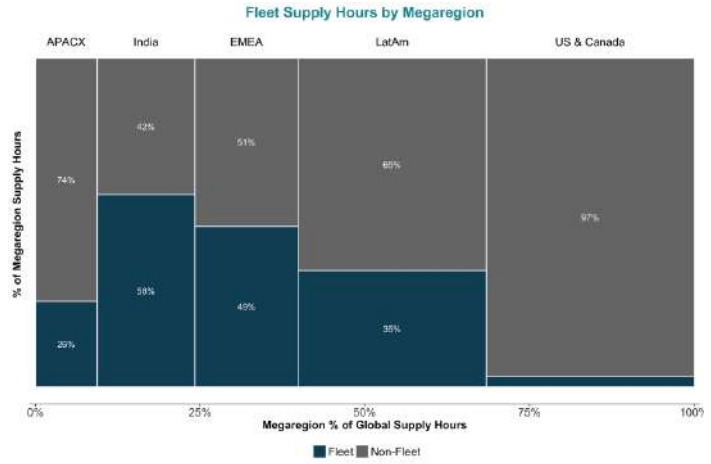
STRATEGY

PLANNING

EXECUTION

Driver Audience

**Fleet partners provide ~30% of our global driver hours and are concentrated in high-growth regions.**



INSIGHTS

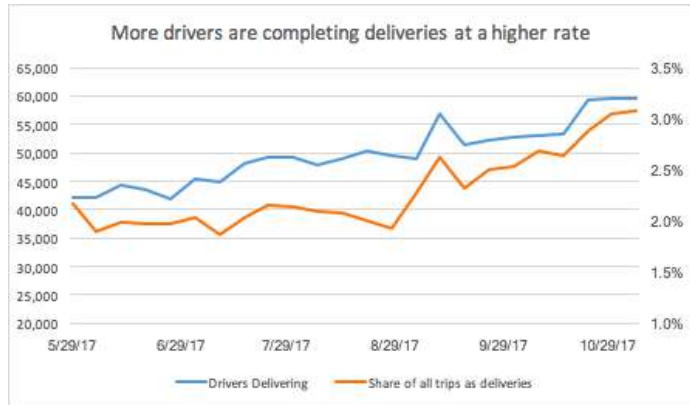
STRATEGY

PLANNING

EXECUTION

Driver Audience

**Uber Everything is providing more opportunities for drivers, with over 3.5% of global drivers currently transporting food or packages.**



INSIGHTS

STRATEGY

PLANNING

EXECUTION

INSIGHTS

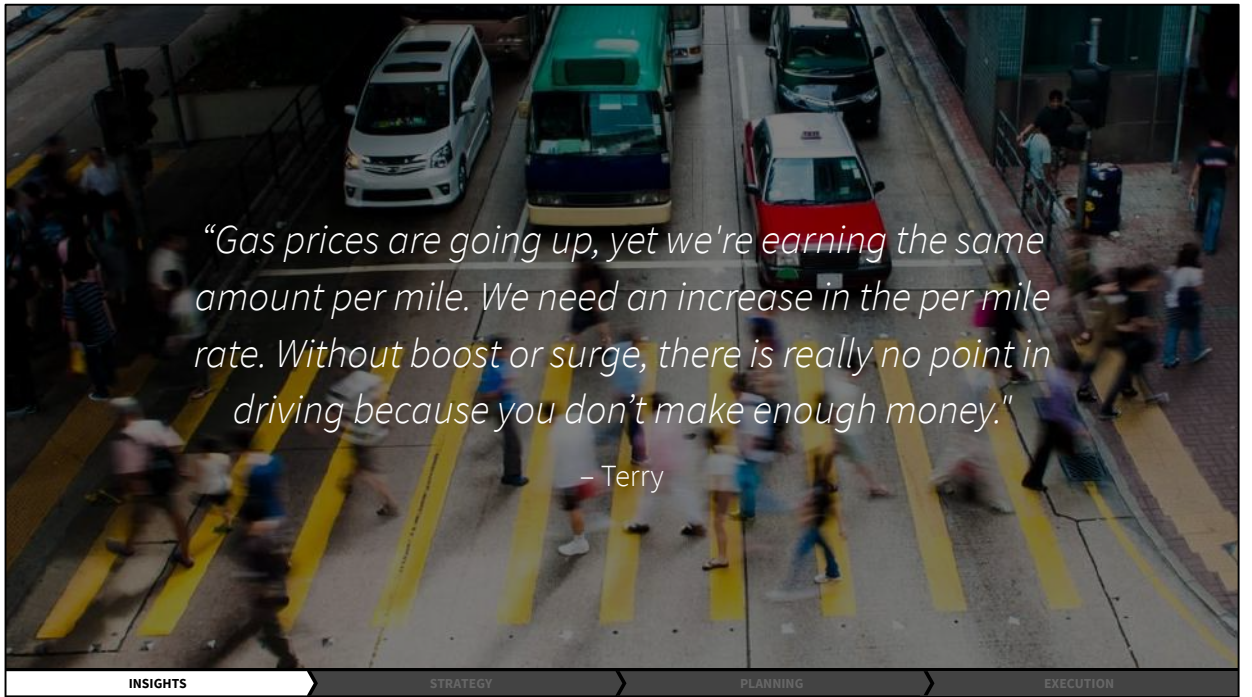
# Marketplace Dynamics

INSIGHTS

STRATEGY

PLANNING

EXECUTION



*“Gas prices are going up, yet we're earning the same amount per mile. We need an increase in the per mile rate. Without boost or surge, there is really no point in driving because you don't make enough money.”*

– Terry

INSIGHTS

STRATEGY

PLANNING

EXECUTION

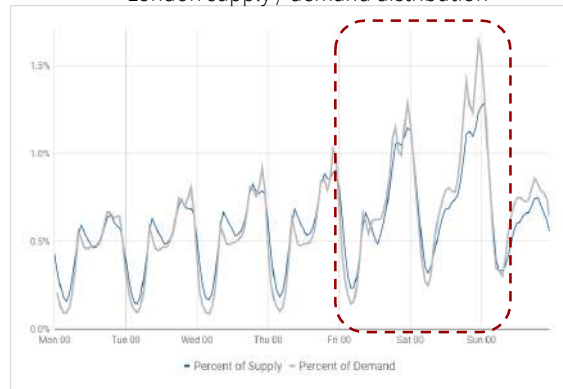
Marketplace Dynamics

**Our network is cost efficient when the right number of drivers are in the right places at the right times. The clearer our market information to drivers, the more efficient we can be.**

Too few drivers, and we lose riders. Too many, and drivers and Uber lose money.

To achieve balance, we must provide information and pricing to **motivate drivers to sign on in advance of anticipated demand, and attract the right mix of full- and part-time drivers.**

London supply / demand distribution



INSIGHTS

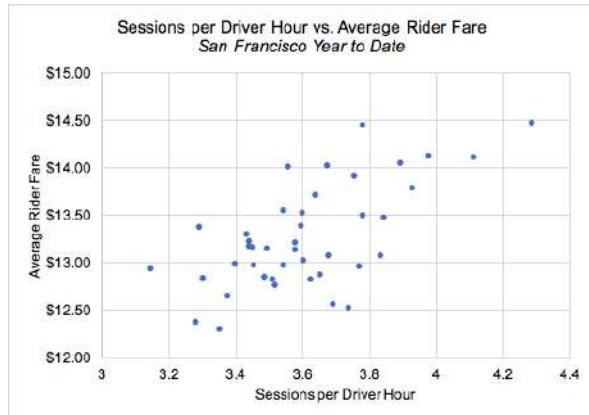
STRATEGY

PLANNING

EXECUTION

Marketplace Dynamics

**The fundamentals of the rider experience—affordability and low ETA/ETDs—depend on driver engagement, without which we risk potentially catastrophic CP loss.**



INSIGHTS

STRATEGY

PLANNING

EXECUTION

Marketplace Dynamics

**Our most productive partners are the small core of veteran drivers—both full- and part-time—who drive consistently. And they are dual-apping (US).**



INSIGHTS

STRATEGY

PLANNING

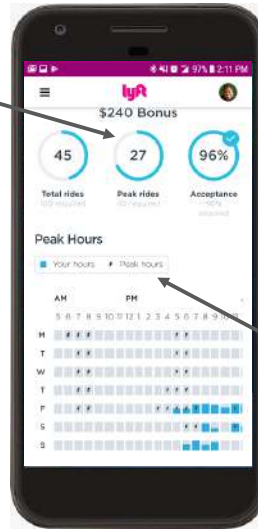
EXECUTION

Marketplace Dynamics

**Our competitors are attracting highly engaged drivers at peak hours more than we are, notably in the US.**

(And they are spending for it. We maintain a strong efficiency and spend gap in the US.)

Peak Ride Requirement for DxGy Structures



Dedicated UI to encourage driving during peak times

INSIGHTS

STRATEGY

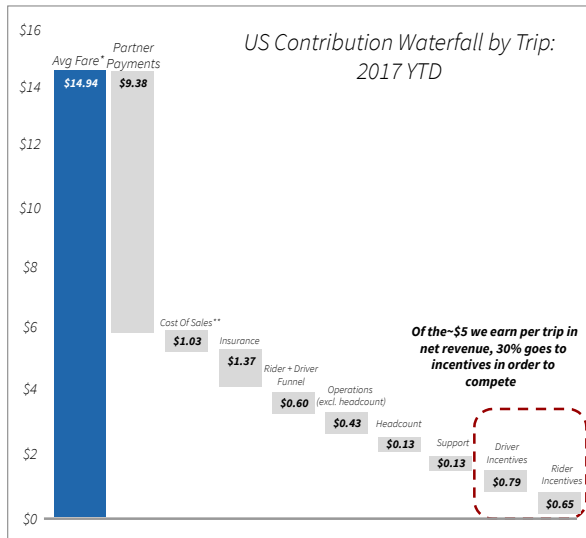
PLANNING

EXECUTION

Marketplace Dynamics

**Our current competitive strategy is costly and unstable. Our incentives either don't lock people in, or are expensive to implement when they do.**

Our most positive point of differentiation comes from our trip volume; and we are seen slightly less favorably than our competitors among those that drive with both.



INSIGHTS

STRATEGY

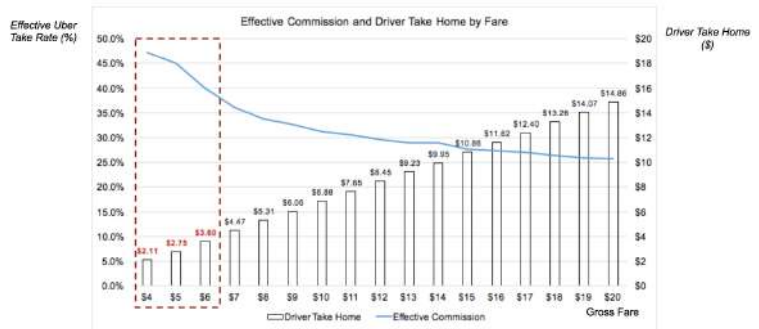
PLANNING

EXECUTION

Marketplace Dynamics

**Our pricing model doesn't reflect the costs/benefits to the network.**

**For instance: driver take-home earnings increase with longer trips.**



INSIGHTS

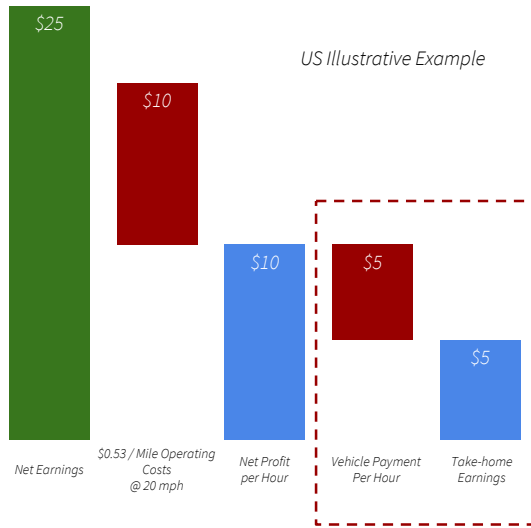
STRATEGY

PLANNING

EXECUTION

Marketplace Dynamics

**Getting access to a car can be expensive. There is a fundamental mismatch between the promises we make of easy-entry, flexible earnings and the requirement of car ownership.**



INSIGHTS

STRATEGY

PLANNING

EXECUTION

Marketplace Dynamics

**We should focus on serving our high-value core driver segments while also investing in segments that can support sustainable growth in the future. (US-centric slide)**

(1) Serving our high-value core driver base better

(2) Invest in key segments to support sustainable growth

Engagement	Full Time	
	Part Time	
Consistency	Highly Consistent (75%+ Weeks Active)	
Experience	Veteran (>250 LT Trips)	New (<25 Trips)
Demographics		Female

INSIGHTS

STRATEGY

PLANNING

EXECUTION

INSIGHTS

# Driver Earnings



INSIGHTS

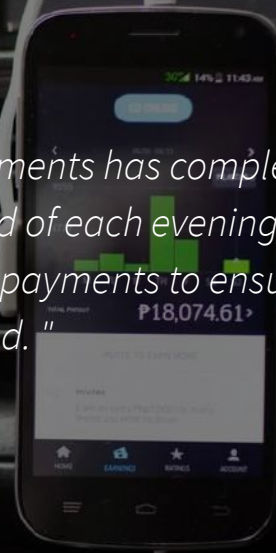
STRATEGY

PLANNING

EXECUTION

*“My trust for accurate, on-time, and fair payments has completely dried up. I feel forced to sit down at the end of each evening to calculate all my trip distances, times, and payments to ensure Uber is paying me as owed.”*

– Kelly



INSIGHTS

STRATEGY

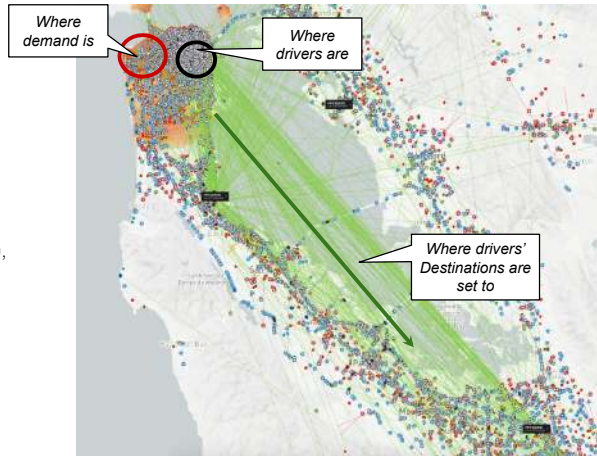
PLANNING

EXECUTION

#### Driver Earnings

### Drivers drive to maximize their earnings per effort, and this isn't always in sync with our offers and pricing.

When our offers don't align with driver motivations, drivers churn (e.g. new drivers with below average EPH), or undermine the rider experience (e.g. cherry picking results in ETA increases).



INSIGHTS

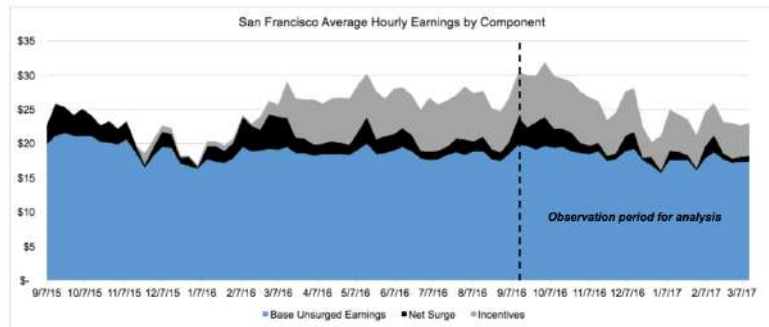
STRATEGY

PLANNING

EXECUTION

Driver Earnings

**Drivers**  
value steady,  
predictable  
earnings – but  
today, luck plays  
too big a factor.



INSIGHTS

STRATEGY

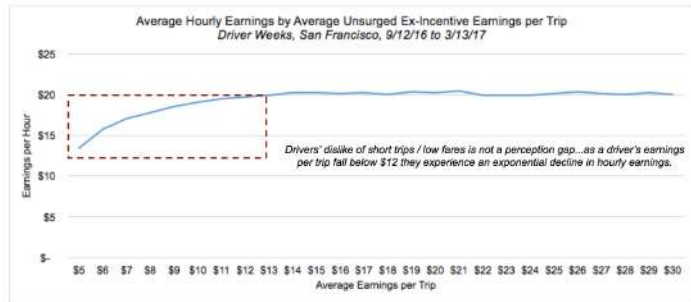
PLANNING

EXECUTION

Driver Earnings

**Drivers should be indifferent to trip choice, but they're not.**

**Pool, for example, is sometimes a poor earnings choice.**



INSIGHTS

STRATEGY

PLANNING

EXECUTION

#### Driver Earnings

**The US marketplace adjusts quickly to rate changes and incentives, so hourly earnings tend to flatten over the long term. We need to set more realistic expectations.**



INSIGHTS

STRATEGY

PLANNING

EXECUTION

**Drivers' long-term hourly earnings stay close to the local minimum wage (after expenses), even when we deploy driver rate changes and new incentives. We need to set more realistic expectations.**

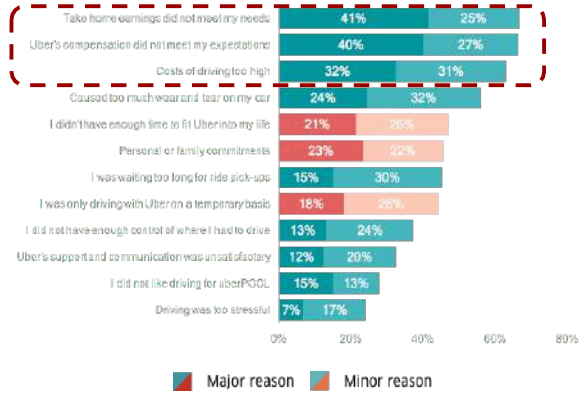
## Driver Earnings

**New drivers often join the platform with unrealistic earnings expectations or ones that are formed quickly within the first few trips, resulting in dissatisfaction and churn.**

There is very little difference between the full and part-time incentives experience - making it challenging for drivers to know how to set their earnings expectations.

Top reasons for churn are related to Uber  
Economic factors related to earnings are the main drivers

Which of the following reasons would you say contributed to your decision not to drive with Uber?



INSIGHTS

STRATEGY

PLANNING

EXECUTION

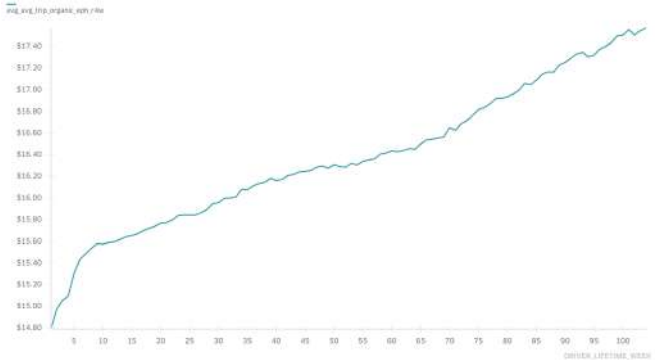
### Driver Earnings

**Driver earnings vary based on skill and tenure—and new drivers are significantly less productive than veteran drivers.**

Yet earnings expectations are often based on early trips, which results in disappointment and churn.

#### Driver earnings increase with tenure.

(Date: LA/SF/CHI/DC/BOS drivers in 2017 who've achieved >= 26 weeks of tenure (trip earnings only))



INSIGHTS

STRATEGY

PLANNING

EXECUTION

Driver Earnings

**Around 10% of new drivers earn less than \$7/hr in their first day, and these drivers are 15% less likely to drive a second day.**



INSIGHTS

STRATEGY

PLANNING

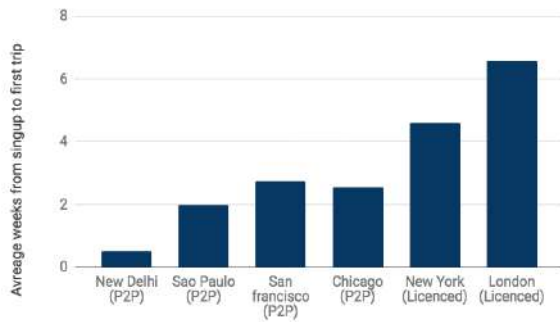
EXECUTION

Driver Earnings

**Getting started with Uber can be slower than competing blue-collar jobs—while offering less transparency and onboarding support.**

And delays are longer in cities that require licences.

Median weeks from sign-up to first trip licenced vs unlicenced cities



INSIGHTS

STRATEGY

PLANNING

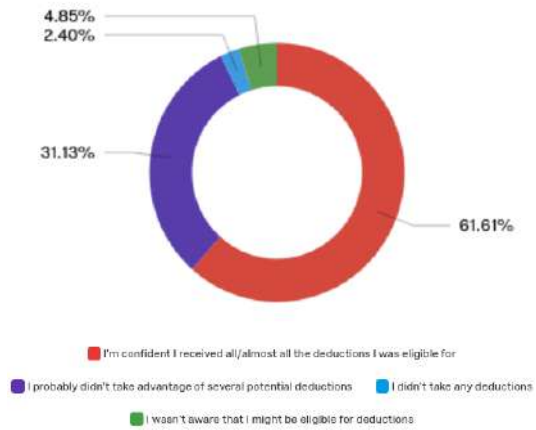
EXECUTION

Driver Earnings

**Costs are high and make a big difference in earnings, taxes above all.**

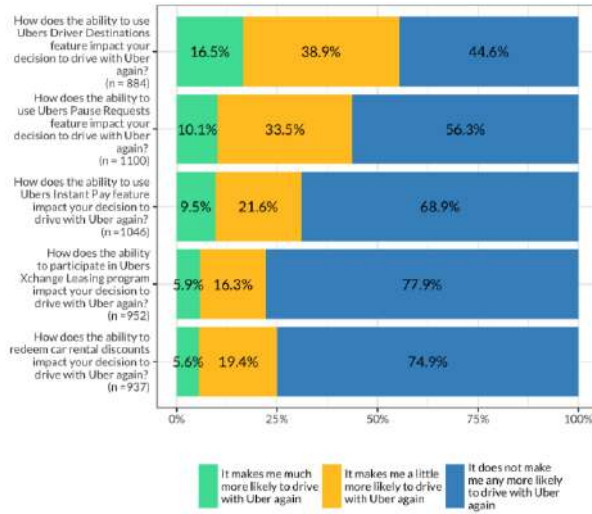
And many drivers are unaware of or unclear on deductions they can claim.

Which best describes how you feel about your income tax deductions? (US)



Driver Earnings

**Drivers love flexibility that allows Uber to fit more effectively into their lives—which allows them to earn with more of their available hours.**



INSIGHTS

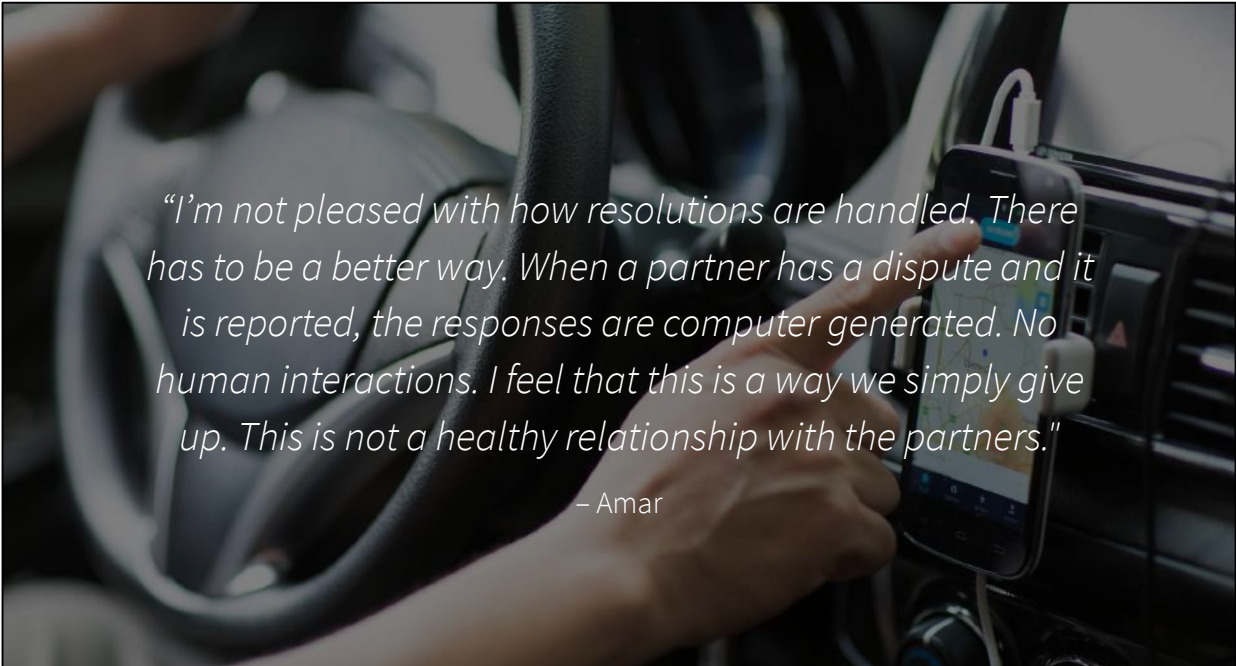
# Driver Experience & Relationship

INSIGHTS

STRATEGY

PLANNING

EXECUTION



*"I'm not pleased with how resolutions are handled. There has to be a better way. When a partner has a dispute and it is reported, the responses are computer generated. No human interactions. I feel that this is a way we simply give up. This is not a healthy relationship with the partners."*

– Amar

INSIGHTS

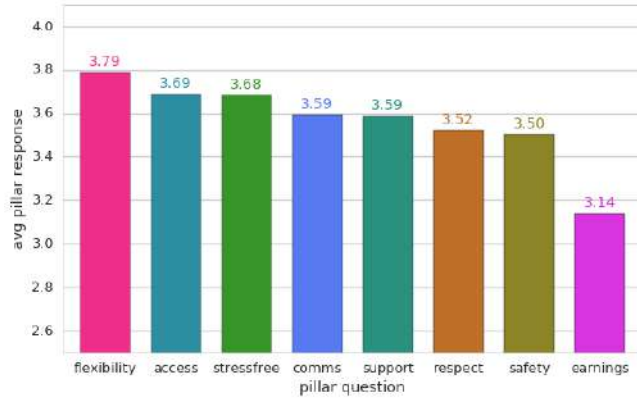
STRATEGY

PLANNING

EXECUTION

Driver Experience & Relationship

**We have significant room for improvement across each one of the 8 Driver Needs.**



INSIGHTS

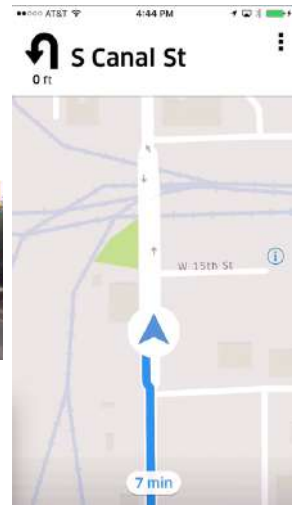
STRATEGY

PLANNING

EXECUTION

Driver Experience & Relationship

**The fundamental experience of driving can be stressful.**



INSIGHTS

STRATEGY

PLANNING

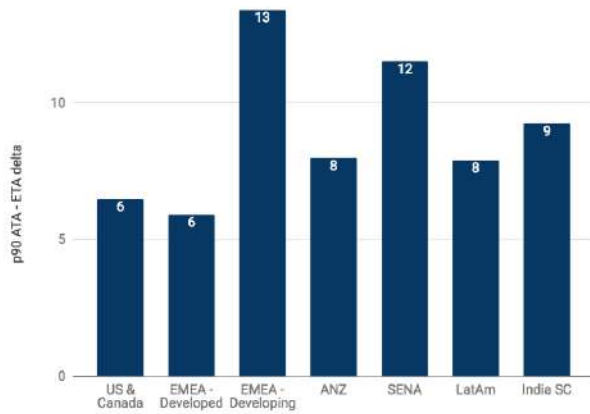
EXECUTION

Driver Experience & Relationship

**Drivers at every lifecycle stage still frequently experience glitches, along with time-consuming or costly flaws in basic aspects of the experience.**

This is apparent across all 8 Driver Needs and undermines retention.

p90 ATA - ETA Delta by Mega Region  
(Restricted to trips with 4-8 min ETA)



INSIGHTS

STRATEGY

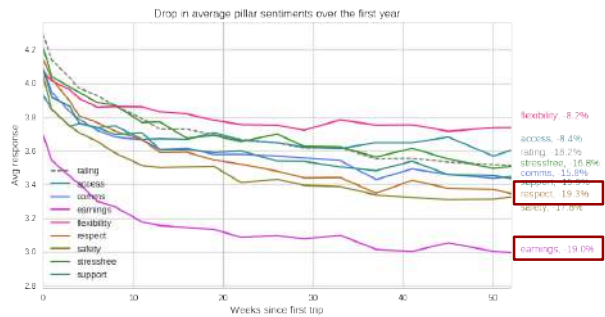
PLANNING

EXECUTION

### Driver Experience & Relationship

**Drivers do not feel Uber's commitment to partnership. They see us as transactional, untrustworthy, and acting in our own self-interest.**

When needed, we are hard to reach and seen as tone deaf. Loyalty from drivers is not rewarded by loyalty from Uber. **Ultimately, we make drivers feel like numbers, not people.** This undermines retention.



INSIGHTS

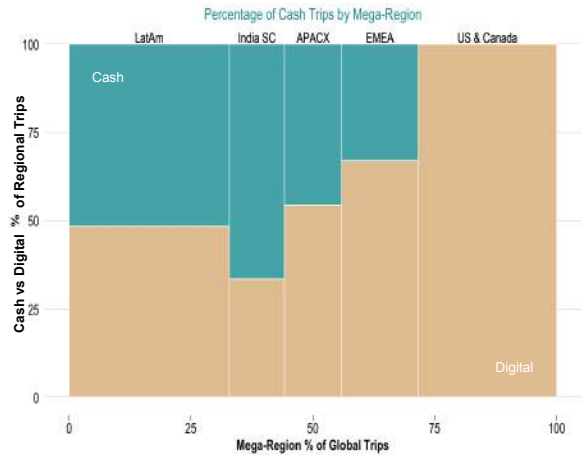
STRATEGY

PLANNING

EXECUTION

Driver Experience & Relationship

**Although cash payments enable a larger percentage of trips for drivers in emerging markets, these trips have led to increasingly larger defect rates, stress, and safety concerns.**



INSIGHTS

STRATEGY

PLANNING

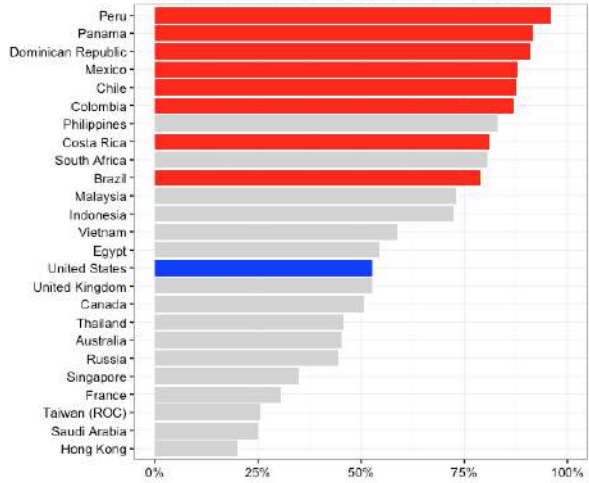
EXECUTION

Driver Experience & Relationship

**Drivers too often experience safety incidents or feel unsafe.**

We fall behind competitors in how drivers view our commitment to safety. **Few agree that Uber is doing enough to keep them safe.**

% of Drivers who Say They Are Concerned About Crime/Violence in Their City



INSIGHTS

STRATEGY

PLANNING

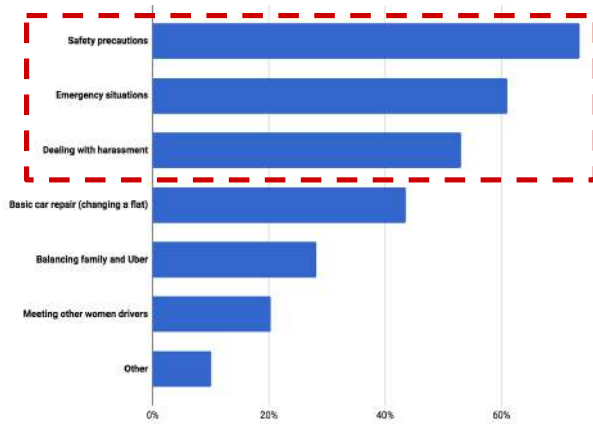
EXECUTION

Driver Experience & Relationship

**We aren't yet addressing top barriers (e.g., safety, access) to make driving more attractive to more people.**

Large segments of prospective drivers are holding back because of identified barriers.

Q.2.2 What should **new women Drivers** know before driving with Uber?



INSIGHTS

STRATEGY

PLANNING

EXECUTION

## Driver Experience & Relationship

**Outside of the US, we lack tailored support for widespread experiences, like cash payments and fleet support.**

Fleets make up a large percent of our driver force, but have a limited set of effective tools and support. The cash experience is similarly suboptimal.

Top issue types		
Rank	Context type	Contribution % / Cumulative %
1	Driver > Trips > Fare review > upfront pricing (not uberPOOL)	17% / 17%
2	Driver > Trips > Feedback about rider > Accidents	5% / 22%
3	Driver > Trips > Fare review > Fare seems low	4% / 27%
4	Driver > Trips > Fare review > Cancellation fee > Cancellation policy	4% / 31%
5	Driver > Trips > Fare review > Cash payment market > Rider error > Rider didn't have enough cash	4% / 35%
6	Driver > Trips > Fare review > Tolls, surcharges & fees > Toll didn't apply	4% / 39%
7	Driver > Trips > Fare review > Mistimed trip > Tech error	4% / 43%
8	Driver > Trips > Fare review > Cash payment market > Technical issue	3% / 46%
9	Driver > Trips > Fare review > Cash payment market > Rider error > Rider refused to pay cash	3% / 49%
10	Driver > Trips > Fare review > Cancellation fee	3% / 52%

INSIGHTS

STRATEGY

PLANNING

EXECUTION

Driver Experience & Relationship

**Drivers find today's shared rides experience stressful and not worth the earnings.**

Yet our best current bet to unlock the next tier of growth is become a **Shared Rides First business.**

*% of drivers satisfied with Uber for each attribute*

Attribute	Total	Looking	Content	Loyal
Cancellation Freq	56%	49%	61%	56%
Training	55%	40%	64%	68%
Navigation	55%	45%	60%	69%
Recognition	50%	32%	59%	71%
Tips	47%	29%	56%	68%
Drivers	46%	35%	52%	64%
Earnings/Trip	46%	23%	59%	73%
Commission/Uber	46%	27%	56%	70%
Promotion Ease	46%	31%	53%	66%
Promotion Fit	45%	29%	54%	68%
Promotion Earnings	43%	29%	51%	62%
Promotion Consistency	43%	30%	50%	63%
Promotion Fairness	40%	27%	47%	58%
Pool Earnings	23%	13%	27%	39%

INSIGHTS

STRATEGY

PLANNING

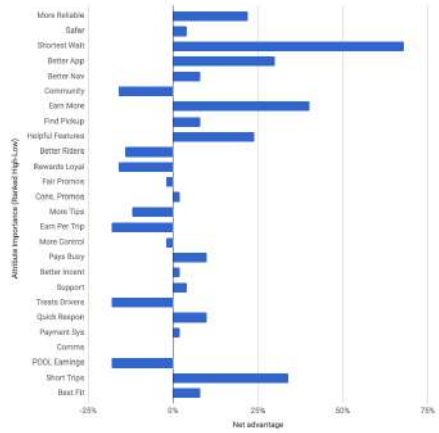
EXECUTION

Driver Experience & Relationship

**Rider behavior is a major pain point for drivers.**

Net Advantage of Uber vs. Lyft by Attribute

Net advantage vs. Attribute



INSIGHTS

STRATEGY

PLANNING

EXECUTION

Driver Experience & Relationship

**The Driver side of our business represents significant compliance and regulatory risk.**

Complex onboarding, and re-entry is increasingly a barrier.

Country Rank	Country Name	Onboarding Breakdown
1	United States	35% Standard Docs 60% Fetch Docs 5% Heavily Licensed
2	Brazil	100% Fetch Docs
3	United Kingdom	100% Heavily Licensed
4	Mexico	100% Fleet
5	Australia	100% Heavily Licensed
6	India	100% Fetch Docs
7	France	100% Heavily Licensed
8	Canada	100% Fetch Docs
9	Indonesia	100% Fleet
10	Saudi Arabia	100% Standard Docs
11	Singapore	100% Heavily Licensed

INSIGHTS

STRATEGY

PLANNING

EXECUTION

Driver Experience & Relationship

**Driver loyalty is not recognized or rewarded today, and there is limited opportunity for progression.**

Segment	Week 4 Retention	% Drivers	% Trips	% Supply Hours	Avg NPS Rating	NPS
Rookie Occasional	48%	24%	8%	10%	8.01	37.68
Rookie Part Timer	67%	8%	6%	7%	8.47	50.53
Rookie Full Timer	75%	8%	13%	13%	8.53	52.11
<b>Veteran Occasional</b>	67%	16%	7%	9%	6.85 (-1.16)	10.40 (-27.28)
<b>Veteran Part-Timer</b>	81%	12%	10%	11%	7.34 (-1.13)	21.95 (-28.58)
<b>Veteran Full-Timer</b>	88%	32%	56%	50%	7.78 (-.75)	33.90 (-18.21)

INSIGHTS

STRATEGY

PLANNING

EXECUTION

Driver Experience and Relationship

**Very little about our platform currently motivates and rewards good service or quality from drivers.**

Drivers can't build repeat business with the riders they serve. Tipping for service is not yet widespread. Great star ratings don't earn drivers additional recognition or earnings.

	% Trips Tipped	Tip/Trip	Avg. Tip	Earnings
Uber	13.5%	\$0.43	<b>\$3.15</b>	4.1%
Lyft	<b>30%</b>	<b>\$0.65</b>	\$2.16	<b>7.2%</b>

	Always Tip	Regular Tip	Never Tip
Uber Riders	1%	3.7%	69%
Lyft Riders	<b>6.1%</b>	<b>16.2</b>	<b>26%</b>

INSIGHTS


# Rider Experience

INSIGHTS

STRATEGY

PLANNING

EXECUTION

A photograph of a woman with long dark hair smiling in the passenger seat of a car, with a man wearing sunglasses in the driver's seat. The image is dimmed to serve as a background for a quote.

*“In the past 2.5 years, I have seen the driver quality totally deteriorate. I believe there should be an actual driving test for some of these drivers as they don't seem to have any common sense. In some cases, it's embarrassing for me to be associated with Uber.”*

– Brian

INSIGHTS

STRATEGY

PLANNING

EXECUTION

Rider Experience

**Our riders are too often dissatisfied with the quality of our drivers and the overall in-car experience (car quality, cleanliness).**

This affects their ridership and our likelihood to be their first choice.

**Top 10 Product Pain Points**  
Strongly Dissatisfied (5) When "where would you rate this experience?" on the overall driver experience survey. Data is based on overall driver experience. Data used for driver and vehicle issues. Continuity threshold for strength of pain point for a given location.

	Travel			Everyday			Holiday			Line Status
	On to the airport	Leave the car at the airport	Transfer to car	On to work	Leave the car at work	Get to work	On to airport	Leave the car at airport	Get to airport	
1. Accurate information about when the driver will pick you up	2 (14)	1 (1)	2 (1)	1 (1)	1 (1)	1 (1)	2 (1)	2 (1)	2 (1)	1 (1)
2. Cars that are high quality and clean	5 (14)	3 (14)	1 (14)	2 (14)	2 (14)	2 (14)	1 (14)	1 (14)	1 (14)	2 (14)
3. GPS that accurately prompts your location	2 (14)	0 (14)	0 (14)	4 (14)	4 (14)	4 (14)	4 (14)	2 (14)	4 (14)	1 (14)
4. Delays and fan mail/donations to any issues related with customer support	1 (14)	3 (14)	3 (14)	2 (14)	1 (14)	1 (14)	3 (14)	1 (14)	1 (14)	0 (14)
5. Clear indicator in the app about what the car shows to look like (clean, model, color, etc.)	1 (14)	2 (14)	0 (14)	0 (14)	0 (14)	0 (14)	2 (14)	1 (14)	1 (14)	0 (14)
6. Drivers taking the most efficient or direct route	0 (14)	0 (14)	0 (14)	1 (14)	2 (14)	2 (14)	0 (14)	0 (14)	0 (14)	0 (14)
7. Accurate maps showing where the driver is when they're en route to pick you up	0 (14)	1 (14)	1 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)
8. Accurate and clear information about your driver (name, history, rating, etc.) is provided to you	0 (14)	0 (14)	0 (14)	1 (14)	1 (14)	1 (14)	0 (14)	0 (14)	0 (14)	0 (14)
9. Multiple car options to fit your needs (POOL, X, XL, etc.)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)
10. The ability to easily communicate with your driver in the app	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)	0 (14)



INSIGHTS

STRATEGY

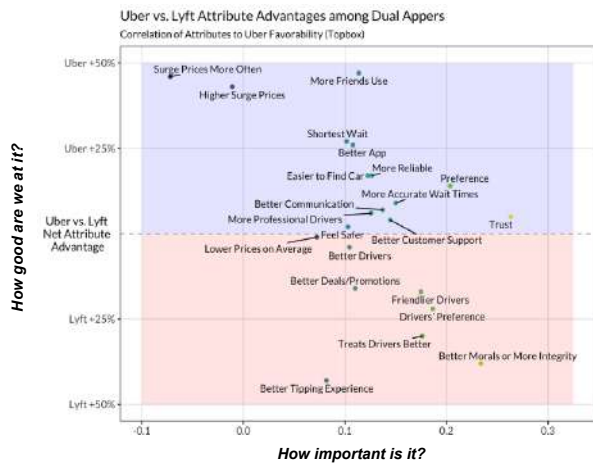
PLANNING

EXECUTION

Rider Experience

**How we treat drivers impacts rider experience, and is a critical driver of rider favorability.**

Riders hear directly from drivers on how we treat them and the current driver consensus is still poor.



Rider Experience

**We are not excelling on rider safety—both in real terms and in terms of rider perception. And riders care.**

% of dual-appers who say 'makes me feel a lot safer'



Awareness

Uber	Lyft
45%	44%
88%	79%
16%	17%
37%	31%
42%	35%
46%	41%
73%	65%
89%	80%
56%	39%
44%	39%
36%	32%
89%	83%
89%	76%

INSIGHTS

STRATEGY

PLANNING

EXECUTION

In the US, fewer riders than you would expect are aware of key safety features on the platform, notably insurance and background checks.

Safety concerns among riders -- and drivers as we saw earlier -- outside the US can be more severe than this.

INSIGHTS

# Spend Efficiency

INSIGHTS

STRATEGY

PLANNING

EXECUTION

Spend Efficiency

**Outside of marketplace balance, we have many cost inefficiencies. (e.g. support costs, insurance costs). Insurance costs per trip are currently higher than driver incentives per trip in the US. Incremental improvements here will grow our overall bottom line, which we can reinvest in our users.**



INSIGHTS

STRATEGY

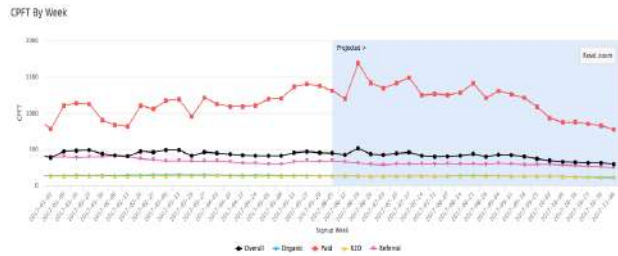
PLANNING

EXECUTION

### Spend Efficiency

## There is inefficiency with how we incentivize signups per channel.

We spend a considerable amount to acquire new drivers during demand constrained times and on demand during driver constrained times.



INSIGHTS

STRATEGY

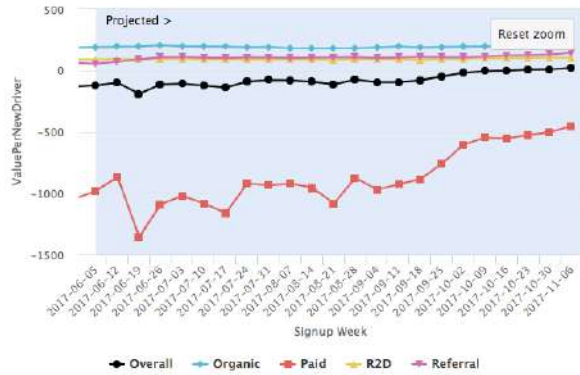
PLANNING

EXECUTION

Spend Efficiency

**Organic signups are the most cost-effective channel for new users. However, they require innovation to see additional return.**

Acquisition Profit Component: Value per New Driver (LTV - CPFT)



Note: Acquisition Profit is defined as (Num. FTS) \* (LTV - CPFT) for each cohort.

INSIGHTS

STRATEGY

PLANNING

EXECUTION

INSIGHTS

# Results

INSIGHTS

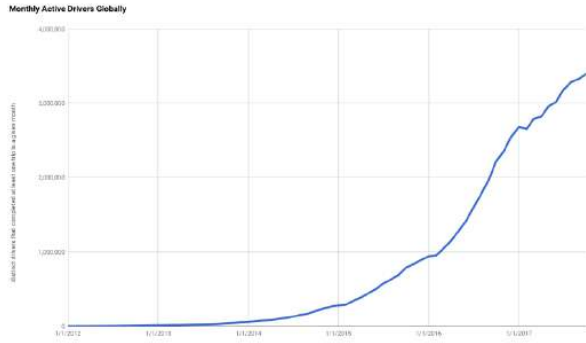
STRATEGY

PLANNING

EXECUTION

Results

**On a good note, we continue to grow at a fairly dramatic pace.**



INSIGHTS

STRATEGY

PLANNING

EXECUTION

Results

**H2 2017  
drove marked  
improvements in  
Driver Sentiment.**

Change in Mean Driver Sentiment Since June



INSIGHTS

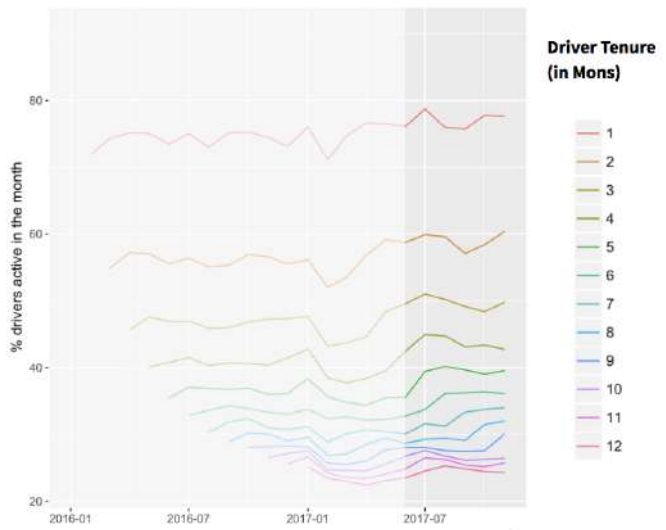
STRATEGY

PLANNING

EXECUTION

Results

**Four week retention  
for new drivers  
increased by 2% in  
H2.**



INSIGHTS

STRATEGY

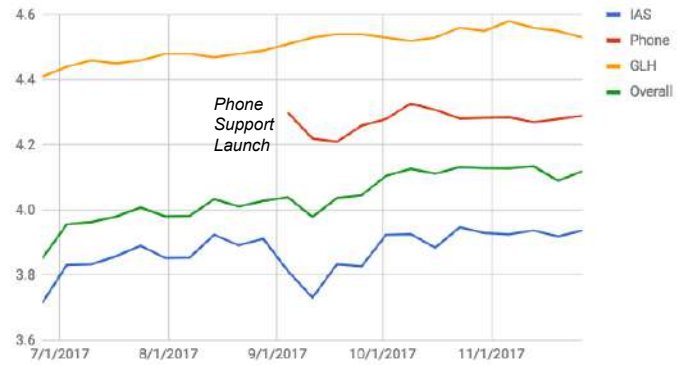
PLANNING

EXECUTION

Results

**CSAT increased from 3.8 in August to 4.1 in November with Drivers now receiving 35% of support through phone.**

Driver Support CSAT



Results

**And introduced new opportunities to earn on the platform.**

	\$ Per Eligible Trip	Total Payout to Drivers to-date	Annual Run Rate
<b>Tips</b>	\$0.43	\$194 M	\$540 M
<b>Pay For Wait Time</b>	\$0.32	\$30.2 M	\$200 M
<b>POOL Pickup Fare</b>	\$0.80 (per chain)	\$12.5 M	\$65 M
<b>Long Cancel Fee</b>	/	\$1 M	/
<b>Pay4ETA</b>	/	\$1.8 M (in 20 launch cities)	/

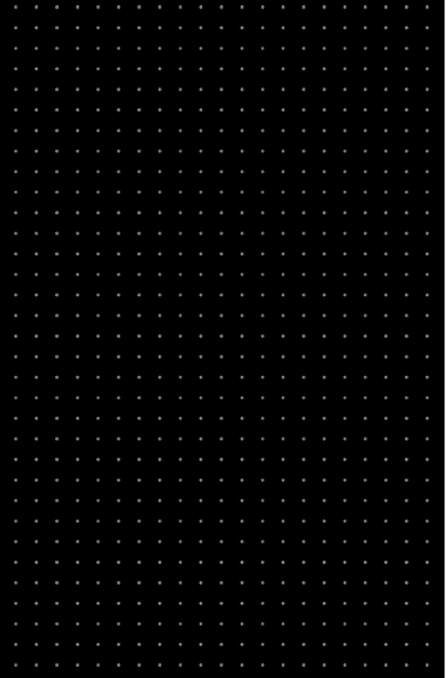
INSIGHTS

STRATEGY

PLANNING

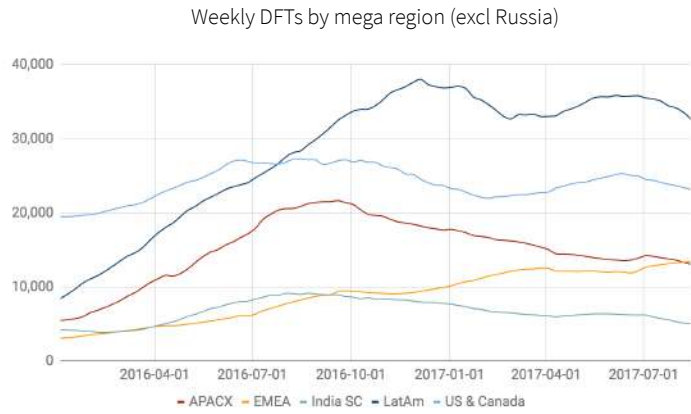
EXECUTION

However...



Results

**New driver growth is slowing.**



INSIGHTS

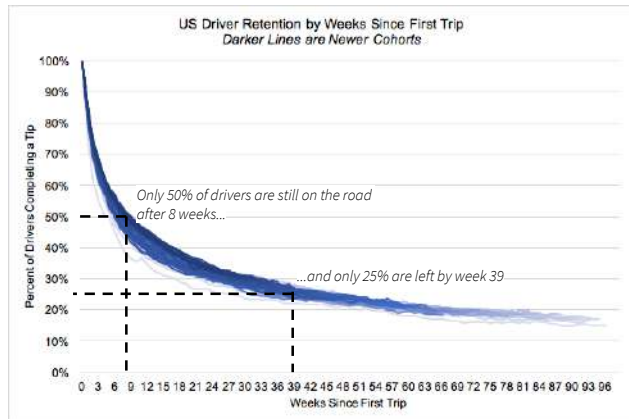
STRATEGY

PLANNING

EXECUTION

Results

**Driver retention  
remains expensive.  
Churn is troubling.**



INSIGHTS

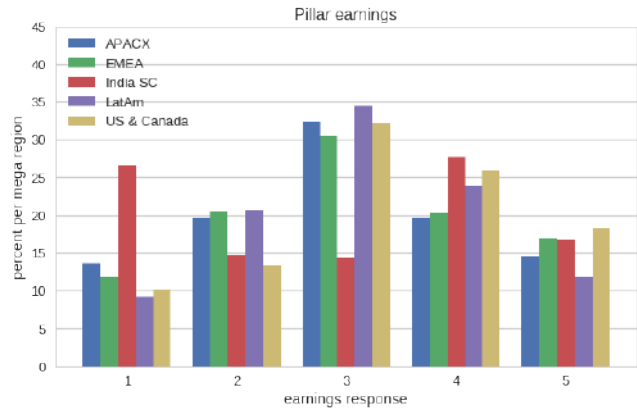
STRATEGY

PLANNING

EXECUTION

Results

**Sentiment still  
has a long way to go—  
particularly related to  
earnings.**



INSIGHTS

STRATEGY

PLANNING

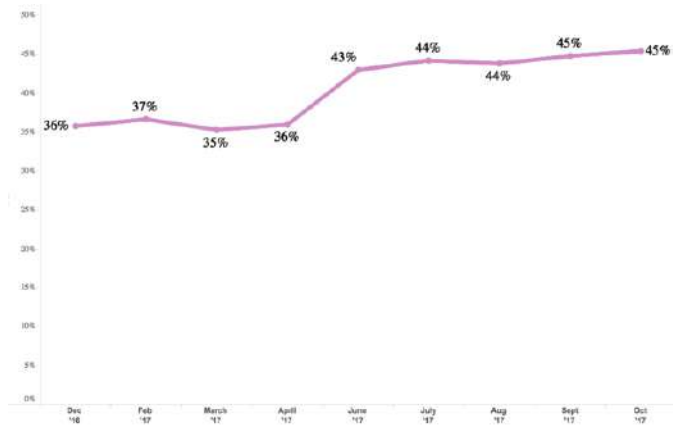
EXECUTION

Results

**Dual-apping\* among US drivers is increasing, and undermining our primary competitive advantage of relative scale.**

\* Dual-apping is the smart economic choice for drivers

US Active Driver - % Drivers Dual Apping with Lyft in Month



INSIGHTS

STRATEGY

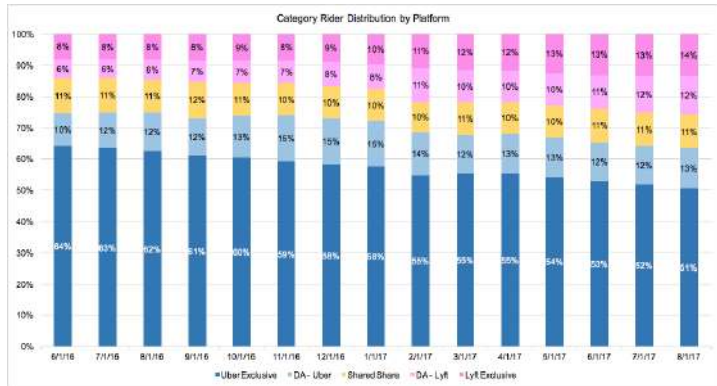
PLANNING

EXECUTION

Results

**And riders are also increasingly dissatisfied and dual-apping.**

**That results in decreasing CP—at enormous cost.**



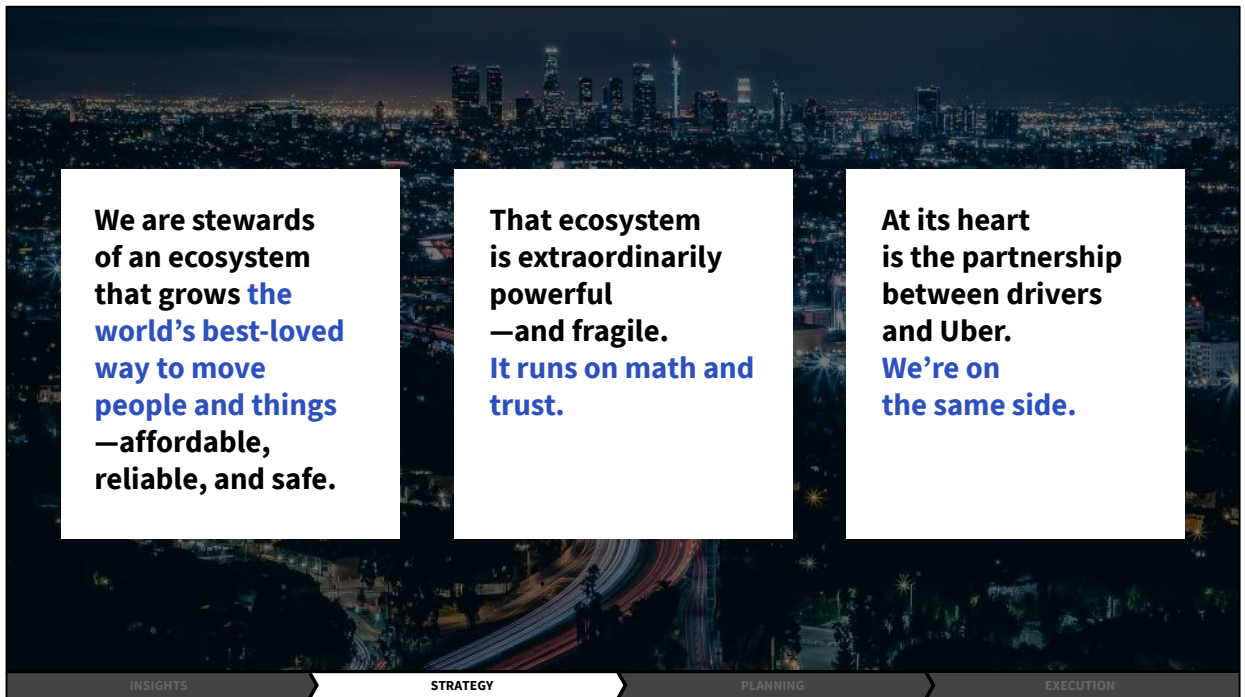
- Riders who have only ever ridden with Lyft*
- Riders who have previously used Uber, but only rode on Lyft in a given timeframe*
- Riders who took a trip on both platforms in a given timeframe*
- Riders who have previously used Lyft, but only rode on Uber in a given timeframe*
- Riders who have only ever ridden with Uber*

So...we have  
**work to do**  
in 2018.

# 2018 Strategy

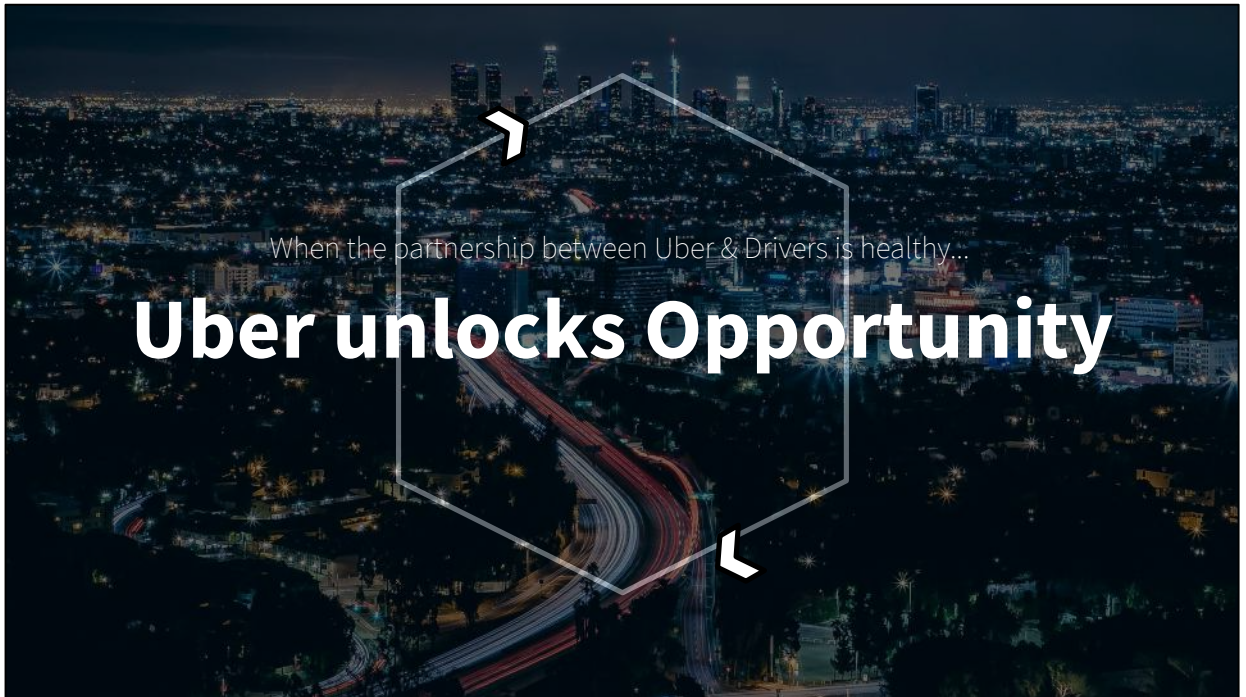
## **Billy**

- Alright so, with that, we'll walk through our 2018 Driver Strategy
- I walked through this yesterday at the highest level on the staff call, but today we're going to get into it in a bit more depth.
- Remember, this is not a tech strategy, or an Ops strategy, this is Uber's 2018 Driver strategy



## Billy

- A few guiding truths we have come to realize over the past half that we need to keep in mind as we build the strategy
- 1 (read box 1)
  - This means we need to be incredibly thoughtful about how our decisions affect the balance of that ecosystem.
  - Small changes can have big, disparate impacts on participants in the marketplace
- 2 (read box 2)
  - This means trust is ultimately what gives us the space to roll out changes to features that drivers don't completely understand
  - We've re-built trust since the beginning of 180, but we're still not where we need to be and small missteps are a big deal
  - We need to get to a point where small missteps are not a big deal
- 3 (read box 3)
  - While there are near-term things we can do (and have done) to shift the balance in our favor, the reality is, without happy drivers we do not have a sustainable platform



## **Billy**

- Our strategy starts with a simple premise: Uber, much like any marketplace, works best when it works for everyone
- That means drivers, riders, and Uber's interests are all aligned, and everyone can participate on the platform sustainably



The work ahead

**In 2018,** our strategy is to enhance and grow this flywheel, to offer enduring opportunity to millions of drivers.

**This is a tremendous and inspiring challenge.**

Billy

So we're going to invest in this flywheel in 2018, and prioritize efforts that occupy a place on this flywheel

This means we'll make some different changes for 2017

Our 2018

**Driver**

**Strategy...**





Our 2018 is TRUE PARTNERSHIP

-- We've called drivers our partners for a long time, but have we truly delivered on what that means? This year we will focus on making the promise of partnership real.



**Britt**

- **So what is true partnership? We're introducing the strategy with a manifesto that will help us to define what that means.**



is...

## **A two-way relationship.**

We address what drivers need most—while asking them to serve riders in a way that supports our shared path of growth.



### **Britt:**

- **A two-way relationship.**
- We address what drivers need most—while asking them to serve riders in a way that supports our shared path of growth.



True Partnership is...

**Setting realistic expectations for drivers—**  
then working tirelessly to exceed them.

•

Making Uber really work for drivers' varying lives, and  
**attracting and keeping the people who want  
to drive the hours and places needed.**

•

Treating drivers with immense respect and consideration as  
**business partners whose success drives ours.**



**Britt:**

- **Setting realistic expectations for drivers—** then working tirelessly to exceed them.
- Making Uber really work for drivers' varying lives, and **attracting and keeping the people who want to drive the hours and places needed.**
- Treating drivers with immense respect and consideration as **business partners whose success drives ours.**



True Partnership is...

**Putting driver safety first.**

Even when it means short-term sacrifice.

•


**Seeing Uber as a service, first and foremost.**

We look after drivers so they can take care of riders.

•

**Dismantling the myth of the  
all-powerful, mega-profitable Uber  
playing overlord with their livelihoods**

—and offering transparency, clarity,  
and humility in its place.



**Britt:**

- **Putting driver safety first.** Even when it means short-term sacrifice.
- **Seeing Uber as a service, first and foremost.** We look after drivers so they can take care of riders.
- **Dismantling the myth of the all-powerful, mega-profitable Uber playing overlord with their livelihoods**  
—and offering transparency, clarity, and humility in its place.



True Partnership is...

**Recognizing quality and loyalty.**

We stick with drivers for the long haul, and ask them to do the same. And we make sure that safe, high-quality, consistent drivers see rewards, rather than subsidizing others.

•

**Asking for drivers' help**

in making our ecosystem work—  
from shared rides to safety to perfect pickups.

•

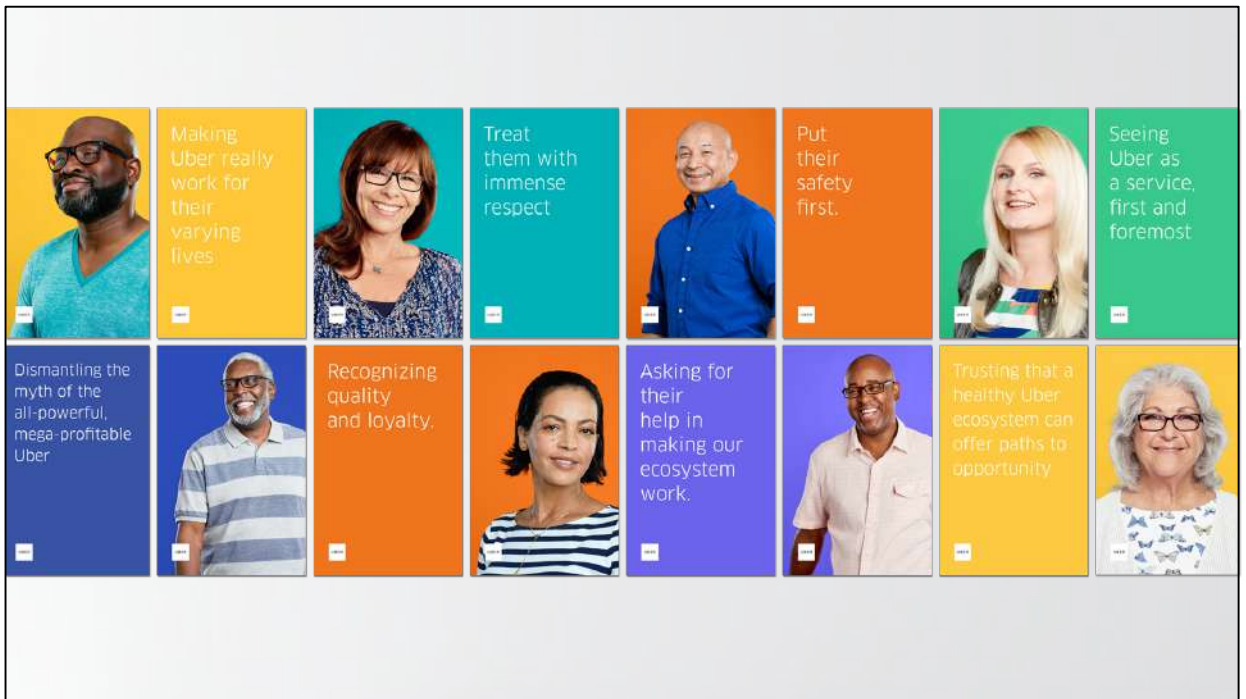
**Trusting that a healthy Uber  
ecosystem can offer paths to opportunity**

that match and surpass what great drivers expect.



**Britt:**

- **Recognizing quality and loyalty.**  
We stick with drivers for the long haul, and ask them to do the same. And we make sure that safe, high-quality, consistent drivers see rewards, rather than subsidizing others.
- **Asking for drivers' help** in making our ecosystem work—from shared rides to safety to perfect pickups.
- **Trusting that a healthy Uber ecosystem can offer paths to opportunity** that match and surpass what great drivers expect.



Britt to hand off to Manik

# How do we make **True Partnership** real?

## **Manik**

- Hi everyone, I'm Manik Gupta, Senior Director of Product for Marketplace and Maps
- We've just heard about True Partnership from Billy and Britt, but how do we deliver on this partnership - around the world - for our Drivers?



Our global driver strategy has five key elements, grounded in insights.

<sup>1</sup>  
**Aligned  
Interests**

<sup>2</sup>  
**Earnings  
Leadership**

<sup>3</sup>  
**Flawless  
Experience**

<sup>4</sup>  
**Driver  
Quality**

<sup>5</sup>  
**Spend  
Optimization**

## **Manik**

- Our driver strategy has five key elements, all grounded in deep, global insights. If you haven't checked out the pre-reading Aaron sent around, I highly recommend it. Let's walk through each element now.



1

## Aligned Interests

# Match driver interests, rider interests and marketplace needs with precision

Attract and motivate the right mix of full- and part-time drivers to drive consistently when and where we need them.

Reframe driver pricing to align with actual costs and benefits to the network.

### Manik

- First is Aligned Interests: to Match driver interests, rider interests, and marketplace needs with precision
- So, as one example, imagine driver pricing that more effectively rewards driver effort and going the extra mile for riders.

2

## Earnings Leadership

# Make Uber the most earnings-effective option for drivers

Improve driver productivity, from day one.

Ensure earnings reliability and lower drivers' costs.

Deliver on flexibility to help more people earn with more of their hours.

### Manik

- Second is Earnings Leadership: Make Uber the most earnings effective option for drivers
- Here you could imagine smarter preferences that solve specific driver flexibility needs, without undermining marketplace health

3

## Flawless Experience

# Partner with great respect to deliver a flawless driver experience day after day

Serve drivers through an accessible, guided and rewarding experience, continuously perfected across all touchpoints and at every moment that matters.

Keep our drivers safe.

Create differentiating experiences that make Uber a beloved first choice every time.

Stand by drivers for the long term, reward loyalty with loyalty and support their paths to opportunity on and off the road.

### Manik

- Third is Flawless Experience: Partner with great respect and respect day after day
- This means...Strong commitment to driver safety - particularly in cash-heavy markets -even at the expense of growth.

4

## Driver Quality

# Ensure that our drivers are the highest quality on the road

Ensure that our drivers are the safest,  
even at the expense of near-term driver growth.

Equip drivers to offer consistently great service  
that builds pride in their work.

### Manik

- Fourth, Driver Quality: Ensure that our drivers are the highest quality on the road
- This means helping drivers understand what riders are looking for that is within their control, a safe and comfortable ride, and finding ways to reward that type of behavior.
- This strategic element creates a natural handoff and interaction with the “Quality” Pillar of Rider Forward. It’s how we will help drivers deliver the consistent, comfortable ride riders need. Increasingly throughout 2018, I’m excited to see how we can collaborate even more with our Rider strategy.

5

## Spend Optimization

# Continuously optimize driver spend

Optimize acquisition costs, cost structures and marketplace levers and invest savings to generate more opportunity.

### Manik

- A finally, Spend Optimization: Continuously optimize driver spend
- The more we can optimize all our costs (incentive cost, support cost, etc.), the more we can reinvest that savings into making the experience even better.

# 2018: True Partnership with Drivers

1

## Aligned Interests

Match driver and rider interests and marketplace needs with precision

Attract and motivate the right mix of full- and part-time drivers to drive consistently when and where we need them.

Reframe driver pricing to align with actual costs and benefits to the network.

2

## Earnings Leadership

Make Uber the most earnings effective option for drivers

Improve driver productivity, from day one.

Ensure earnings reliability and lower drivers' costs.

Deliver on flexibility to help more people earn with more of their hours.

3

## Flawless Experience

Partner with great respect to deliver a flawless driver experience day after day.

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Ensure that our drivers are the highest quality on the road

Ensure that our drivers are the safest, even at the expense of near-term driver growth.

Equip drivers to offer consistently great service that builds pride in their work.

5

## Spend Optimization

Continuously optimize driver spend

Optimize acquisition costs, cost structures and marketplace levers and invest savings to generate more opportunity.

## Manik

- Combined, these strategic elements of True Partnership represent a much deeper strategy
- Flawless Experience - our third priority - is in essence a way of restating our H2 2017 strategy: to design, deliver, and market radical improvements to the driver experience. Which is evidence of how much more refined our thinking has become.
- But what is most exciting to me is that if we do all this, we'll make good on our partnership with drivers, and unlock massive opportunity for everyone. For drivers, for riders, and for Uber.

In 2017, we were focused on Driver Sentiment as our primary metric.

In 2018, we have a much more sophisticated strategy—and, with this, a much more sophisticated approach to **measuring success.**

**Manik**

- As our strategy has become more sophisticated, so too has our approach to measuring success
- We will be tracking - in partnership with a variety of teams across Tech and orgs - a variety of metrics

## Measure Success: Driver Forward 2018 Key Results

Driver Strategy	KPIs	Goals (by mega-region)
<b>Match driver interests and marketplace needs with precision</b>	<ul style="list-style-type: none"> <li>• Driver Hours</li> <li>• Driver First Trips</li> <li>• Completed / Sessions; Supply Efficiency*</li> </ul>	<ul style="list-style-type: none"> <li>• TBU</li> <li>• TBU</li> <li>• TBU</li> </ul>
<b>Make Uber the most earnings-effective option for drivers</b>	<ul style="list-style-type: none"> <li>• Earnings Stability</li> <li>• Sentiment (Earnings)</li> <li>• Contact Rate (Earnings)</li> </ul>	<ul style="list-style-type: none"> <li>• TBU</li> <li>• TBU</li> <li>• TBU</li> </ul>
<b>Partner with great respect to deliver a flawless driver experience day after day.</b>	<ul style="list-style-type: none"> <li>• Sentiment (Overall)</li> <li>• Contact Rate (Overall)</li> <li>• Market-Value Drivers % Trip Share</li> <li>• Driver App Reliability</li> <li>• 4W Retention</li> </ul>	<ul style="list-style-type: none"> <li>• TBU</li> <li>• TBU</li> <li>• TBU</li> </ul>
<b>Ensure that our drivers are the highest quality on the road</b>	<ul style="list-style-type: none"> <li>• Driver Ratings**</li> <li>• Safety Incidents</li> </ul>	<ul style="list-style-type: none"> <li>• TBU</li> <li>• TBU</li> </ul>
<b>Continuously optimize driver spend</b>	<ul style="list-style-type: none"> <li>• Cost Per First Trip</li> <li>• Variable Contribution Per Trip</li> </ul>	<ul style="list-style-type: none"> <li>• TBU</li> <li>• TBU</li> </ul>

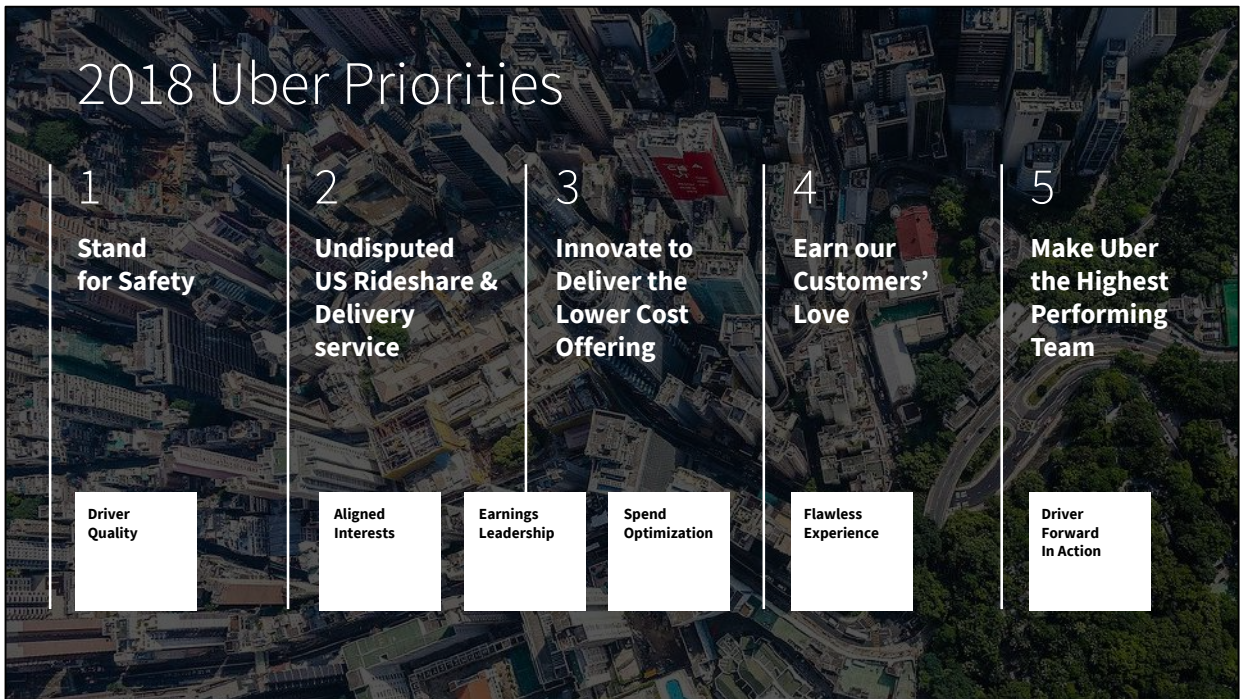
\* Pending confirmation with MP team

\*\* Potentially to be updated with Driver Quality as measured by Rider team blind surveys

Our 2018  
Driver Forward  
strategy is  
**part of the 2018  
Uber strategy.**

**Manik**

- And our 2018 Driver Forward Strategy is part of the 2018 Uber Strategy



**Manik**

- As you can see, they ladder elegantly into our 2018 Uber Priorities
- For example Flawless Experience will clearly help us earn our customers love
- And - while we didn't list it in our driver strategy - continuing to build this global, cross-functional strategy and execution muscle - or Driver Forward in Action - is critical to making Uber the Highest Performing Team going forward

If we do all this, we  
will make good on  
**our value proposition  
to drivers...**

**Manik**

- If we do all this we will make good on our value proposition to drivers...



DRIVER VALUE PROPOSITION

***“Uber is my partner.***

*It’s the smartest and most rewarding way to earn, fits into my life, and gives me the support I need to succeed.”*

Manik

- “Uber is my partner. It’s the smartest and most rewarding way to earn, fits into my life, and gives me the support I need to succeed.”

What is the **work**  
**we'll do to**  
**execute** the 2018  
True Partnership  
strategy?

Manik:

- Obviously, this is really exciting, and lots more to come.
- We're in the midst of finalizing our bottoms up plans across every function, but will share high level plans shortly.

# 2018 Plan

A woman with short dark hair, wearing a black top, stands with her arms crossed in front of a dark-colored car. The background shows some foliage. The text is overlaid on the left side of the image.

In 2017 we organized our work around the core **Driver Needs**.

In 2018 we will continue to use this structure to execute against our strategy. These Needs map to our **8 Pillars**.

# The 8 Pillars of Driver Forward

## TRUE PARTNERSHIP

Access

Vehicles

Earnings

Flexibility

Safety

Stress-Free

Support

Relationship

Access

Vehicles

Earnings

Flexibility

Safety

Stress-Free

Support

Relationship

The pillars for 2018  
- And now I will be handing off to Abhi and Taz to cover our first pillar

Access

Vehicles

Earnings

Flexibility

Safety

Stress-Free

Support

Relationship

Access

Vehicles

Earnings

Flexibility

Safety

Stress-Free

Support

Relationship

# Access Pillar

[t.uber.com/AccessinDriverAllHands](https://t.uber.com/AccessinDriverAllHands)

Access-Planning-Leads@

**Pillar Owners**

Gagan Shah

Abhishek Kumar

Hi, my name is Taz and I am engineering lead for access pillar.

Hi everyone, My name is Abhishek and I am here to talk about the access pillar.

## Access: Problem Statement

[View Details](#)

Many people looking for opportunities to earn don't realize that Uber has options that will work for them.

If they do sign up, the onboarding process is hard to complete and doesn't prepare them for an early success on our platform.

What is Access: We believe that anybody who works hard has an opportunity to earn

Today. Many people looking for.....

Source:

[https://docs.google.com/presentation/d/1jOI7gHWZN2cKmVdR3MMWUjUztDoJT33aeuHdSexG\\_Qg/edit?ts=5a29fd02#slide=id.g2b8fe23366\\_346\\_55](https://docs.google.com/presentation/d/1jOI7gHWZN2cKmVdR3MMWUjUztDoJT33aeuHdSexG_Qg/edit?ts=5a29fd02#slide=id.g2b8fe23366_346_55)

## Access: Strategy Statement

[View Details](#)

### **Our Vision is to provide...**

instant access to a true partner committed to safety and success.

### **And in this journey, we will...**

Create the foundation on which true partnership is built by providing choices, being clear and making it easy for our partners to get on the road to success.

### **Pillar KPIs:**

Compliance quality  
Driver Sentiments  
Business Impact  
Defect Rate

Source:

[https://docs.google.com/presentation/d/1jOI7gHWZN2cKmVdR3MMWUjUztDoJT33aeuHdSexG\\_Qg/edit?ts=5a29fd02#slide=id.g2b8fe23366\\_346\\_65](https://docs.google.com/presentation/d/1jOI7gHWZN2cKmVdR3MMWUjUztDoJT33aeuHdSexG_Qg/edit?ts=5a29fd02#slide=id.g2b8fe23366_346_65)

## Access: Big Rocks

[View Details](#)

### Compliance

#### Full Automated Compliance

Achieve full quality compliance for all customers and cities

#### Screening Excellence

Transform 'Screening/BGC' systems, quality and experience to drive customer preference

### Platform

#### Fusion

Improve engineering system health, quality and pay tech debt

#### Flexible Access Platform

Create an Access platform that is flexible and scalable across geo, products and customers

#### Spend & Cost Optimization

Optimize direct and indirect cost related to Access

### Reach

#### New Signup Opportunities

Reach new customers through compelling offerings and channel discovery

#### Learning and Education

Prepare, educate, and set partners up for success

#### Reactivation & Re-onboarding

Drive growth by re-activation and by re-engaging stale signups

### Experience

#### Redesigned flow and system

Redesign system UX framework to deliver a clear and supported experience

#### Consistent Messaging Framework

Create cohesive and consistent messaging that can be leveraged across Access

### Automation

#### Automated Access

Automate Access that improves ease of use and reduces requirements asks and makes the process faster

#### Personalization

Optimize access by targeting and personalizing the experience for any customer

Source: [t.uber.com/AccessForward](https://t.uber.com/AccessForward)

How do we get there?

There are 4 dimensions that are important to us - Assurance for a driver trying to onboard with Uber, the Choice they have to earn, and the Clarity we provide through Ease of Use.

I want to highlight 3 of these big rocks today.

1. Full Automated Compliance - which about ensuring automation for all regulatory requirements across every city in the world for every driver on the road
2. Screening Excellence - which is about ensuring reliability and quality of our background checks
3. Fusion - Improving the health of our engineering systems and reducing technical debt

# Vehicle Pillar

**Pillar Owners**  
Jahan Khanna

## Vehicle: Problem Statement

[View Details](#)

Having sustainable access to a vehicle is the biggest barrier for people to drive on Uber.

Our problem statement, unlike our products, is pretty straightforward on the Vehicles team.

Having sustainable access to a vehicle is the single biggest barrier to driving on Uber, especially in international markets where access to capital is limited.

## Vehicle: Strategy Statement

[View Details](#)

We will empower our car-owning partners around the world and make it easy for anyone without a car to drive with Uber, in a sustainable way.

**Pillar KPIs:**

VS Driver Hours

VS Sentiment

VS Defect Rate

So we want to fix this – to make it easy for anyone without a car to drive with Uber, in a way that's sustainable for the driver, the partner, and Uber

## Vehicle: Big Rocks

[View Details](#)

### Foundation

#### Fusion

Improve engineering system health, quality and pay tech debt

#### VS Data Quality

Advancement of understanding our users and business impact through reliable data instrumentation.

#### VS Payments Infra

Ensuring partners and vehicle owners are paid reliably and scalably.

#### Multimodal

Creating the building blocks for Uber to become a one-stop-shop for all urban transport

### Fleets

#### Fleet Owner Tools

Empower Fleet Owners to manage their business efficiently and effectively in order to succeed on Uber.

#### Fleet Earnings

Payments and collections will be a reliable, consistent and transparent experience for all owners and drivers

#### Fleet Growth

Grow Fleets in an economically sustainable way for Owners, Drivers and Uber through clear value proposition, frictionless onboarding and activation experience.

### Hourly

#### Scale US Driver Product

Enhance viability of driver hourly product and expand strategically in the US

#### Assign Global Hourly Partners

Build global launch strategy and begin execution in next priority mega-region.

### Rentals

#### Integrate Large Partners

Integrate our large partners into high quality, sustainable, seamless product experiences globally, one at a time

### Marketplace

#### VS Partner Losses

Improve VS partner gross profitability by reducing losses from the Uber program

#### Reduce Partner Overhead

Improve efficiency of rental contract fulfillment process for new and existing Uber drivers

#### VS Driver Growth & Retention

Improve access to and understanding of offers to help new and existing VS drivers make better vehicle contract decisions

To do this we need to get a number of things right, but I want to call out three priorities on the driver side (these don't include our rider-oriented initiatives like consumer rentals and bikes):

**Alternative to Xchange leasing** – As you know we've shut down Xchange leasing, but we still need a way to get drivers on the road at scale. So we're going to deeply integrate with major rental car companies in the US and Brazil so that drivers can affordably access a car with a few clicks.

**Fleets** – Second of all, fleets are driving more than half of our business in India and Mexico – they're critical. But our fleet products are behind Didi's, and we'll need to catch up as Didi enters those markets.

**Hourly rentals** – And finally, we've launched driver hourly rentals in San Francisco, and it has worked – it's the most flexible way to drive with Uber, and the cheapest source of supply in the city. We're going to scale this around the US and prepare for global expansion.

These are three of our big rocks, but we're also working to improve our payments platform, data quality, and unlock more transportation use cases, so stay tuned for some exciting announcements in 2018!

# Earnings Pillar

**Pillar Owners**

Tom Fallows  
Arundhati Singh

We had to play catch-up on their basic requests.

## Earnings: Problem Statement

[View Details](#)

Drivers feel it's “**me against Uber**” in a **fight to earn** on Uber's platform. It's a **constant, stressful** hustle just to survive.

They experience **micro-tragedies** throughout the day and week: outages, disappointment caused by unrealistic earnings expectations, losses on uneconomical trips, a rollercoaster ride due to highly-variable, black-boxy weekly incentives, unclear & confusing earnings statements, generic and tone-deaf replies from our Support team, and needlessly high operating costs & taxes.

## Earnings: Strategy Statement

[View Details](#)

Because we cannot influence absolute earnings levels, our strategy is to offer an earnings experience that feels unquestionably fair, predictable, rewarding, and stress-free and always works flawlessly.

### Pillar KPIs:

Incremental Trips

Sentiment

- Earnings Overall

- Predictability

Earnings Defect Rate

# Earnings: Big Rocks

[View Details](#)

## Foundation

### Infrastructure

Make flexible and extensible earnings data models and modern services/systems to offer a world-class experience today and enable rapid innovation tomorrow.

### Fare Integrity

Ensure all earnings data and calculations are trustworthy, accurate, and auditable.

### Zero Tickets

Eliminate the root cause of many Earnings defects, and for those that persist, enable instant self-service or high quality agent resolution.

### Clarity &

### Comprehension

Help drivers easily understand what they are getting paid and trust it's right.

### Carbon

Launch a redesigned Earnings experience in Uber's new driver app, spanning both core earnings & earnings expectations.

### Fleet

[Tracking in both Earnings & Vehicles Pillars]

## Fairness

### Core Pricing Model

Improve Uber's core pricing model to ensure that driver earnings on every trip are aligned with driving effort.

### Driver Surge

Make driver surge more trustworthy while improving Marketplace balance.

### Earnings Research

Understand top factors in driver earnings (e.g. Luck vs. Skill) and impact (if any) of volatility on engagement, and KPIs to measure progress.

## Predictability

### Realistic

### Expectations

Help drivers understand and make informed driving decisions based on potential earnings at different times and locations.

### Setting & Achieving Goals

Guide and support drivers to set and achieve earnings goals across sessions.

### CTB to Expeditions

Clear and predictable earnings when drivers elect to complete consecutive trips.

## Rewards

### Reimagining DxGy

Improve the algorithms and experience behind DxGy offers to provide more consistency, choice, and transparency with driver partners.

### Spend Efficiency

Improve Uber's ROI on incentive spend.

## Savings

### Keep More

Minimize the difference between net fare and take home pay.

# Flexibility Pillar

**Pillar Owners**  
AJ Balance

We had to play catch-up on their basic requests.

## Flexibility: Problem Statement

[View Details](#)

“Flexible Earning” is Uber’s key value proposition to drivers, but many drivers feel that Uber is “not really that flexible anymore.”

Drivers feel that choice is still limited (especially given the aftermath of Chapter 3 and today’s incentives structures), and they want to be able to better understand the impact of flexibility on their earnings goals.

## Flexibility: Strategy Statement

[View Details](#)

Make Uber the true “Flexible Earning” opportunity that we promise.

Give drivers an intuitive and consistent way to express their preferences and constraints, and help them make the right tradeoffs between those, their earnings goals, and the realities of the marketplace.

### Pillar KPIs:

VS Driver Hours

VS Sentiment

VS Defect Rate

# Flexibility: Big Rocks

[View Details](#)

## Foundation

### Carbon

Launch redesigned search and preference experiences in Carbon and lay the foundation for offering greater flexibility over time.

### Infrastructure

Extend our preferences infrastructure to offer greater scalability for offering Drivers more flexibility over time.

### Monitoring

Understand the impact and tradeoffs that existing and to-be-launched features will have, on drivers and our marketplace

### Zero Defects

Reduce the defect rate related to flexibility.

## Choice

### Core Prefs: “When, Where, How”

Recover from the firestorm. Extend existing preferences and create better experiences expressing when/where/what types of trips I drive.

### New Prefs + New Driver Segments

Build new preferences and extend our core preferences to specific segments of drivers.

## Sustainability

### Quantifying Flexibility

Understand the true impact of flexibility on the marketplace and the tradeoffs with earnings

### Flexibility Controls and Limits

Build in mechanisms and controls that align driver choice with the realities of the marketplace and some emergency safety valves.

## Consistency

### Integrated Flexible Earning Exp

Make driver choice drive consistent and integrated with core earnings experiences (DxGy, Incentives, etc.)

### Flexibility Guidance

Give drivers the information and suggestions they need to make the best choices for themselves around flexibility, preferences, and constraints

### Platformize

#### Pref/Constraint Inputs

Create a standard way for drivers to express key preferences and constraints (e.g. when/where they drive) across their Uber experiences

# Safety Pillar

**Pillar Owners**  
Sachin Kansal

We had to play catch-up on their basic requests.

## Safety: Problem Statement

[View Details](#)

Drivers feel **Uber doesn't have consistent standards** that help to keep them safe on the platform.

Drivers feel **alone when it comes to their safety**. They think Uber doesn't apply technology to proactively address issues before they become problems.

Drivers feel **Uber doesn't have their back** if they have a safety issue - they feel we lack empathy, can't be reached in a timely manner, and don't follow through.

[Gagan]

## Safety: Strategy Statement

[View Details](#)

We will build and uphold consistent, transparent **driver safety standards**.

We will **partner with drivers** to build the tools they want and need to stay and feel safe, and we will **always have their back** with empathetic, fast and magical service.

### Pillar KPIs:

Vehicle Accidents

IPCs

Safety Sentiment

Insurance Savings

[Abhishek]

# Safety: Big Rocks

[View Details](#)

## Foundation

### Carbon

Manage shipping of all driver safety features in Carbon

### Safety Education

Educating drivers and boosting awareness about Safety features starting from onboarding

### Data Platform

Build infrastructure to provide comprehensive safety and insurance data to stakeholders across the Uber ecosystem.

### Telematics Platform

Building insights on driving behaviors based on unique data available to Uber

## Protocol

### Rider Vetting

Reducing anonymity and increasing accountability to create barriers for malicious riders

### Rider Accountability

Holding current riders accountable for their behavior on the platform

## Proactive

### Safe Trip Intelligence

Leverage machine learning models throughout the trip lifecycle to prevent potentially unsafe trips from happening.

### On Trip Safety

During every trip, riders and drivers have access to Safety Features allowing them to get in touch with loved ones, Uber and authorities

### Safe Driving Products

Safe driving products to keep our drivers safe on the road

### Proactive Monitoring & Detection

Build experiences, policies, tools, and processes to provide reliable, compassionate, and proactive response.

## Reliable

### Magical Claims

During the time of accident, provide seamless and fast claim filing experience while informing the necessary information at the right time

### Critical Safety Response

Industry leading response for critical safety incidents

# Stress-Free Pillar

**Pillar Owners**

Maya Choksi  
Yuhki Yamashita

The Stress-Free pillar is about the experience drivers have doing work on our platform

## Stress-free: Problem Statement

[View Details](#)

The experience of doing work on the Uber platform is fraught with “**micro-tragedies**”<sup>TM (TF?)</sup>, which create **driver stress and frustration**, leading to **inefficiencies** and increased **costs**.

This makes it **tough for drivers to trust** and rely on Uber as a true partner that always has their back.

And as we look at our experience, there aren't just 1 or 2 really big problems - it's death by a thousand papercuts.

Our experience is filled with micro-tragedies - when the app freezes or crashes, when nav tells you to take an illegal turn, or when you accidentally tap the begin or end trip button and mis-time the trip.

All of this leads to driver stress and frustration and it's inefficient and costly.

## Stress-free: Strategy Statement

[View Details](#)

In 2018, the Stress-Free pillar will deliver an always-reliable, easy-to-use experience for drivers and couriers.

We'll focus on the the **basics first** – building a strong, stable, and dependable foundation – then work to develop new solutions to **further enhance** the experience and **guide our drivers** seamlessly throughout.

### Pillar KPIs:

Trip Completion Rate

Trip Defect Rate

Stress-Free Sentiment

In 2018 we want to make our experience always-reliable and easy-to-use.

This means starting with the basics first, building a solid foundation with Carbon -- and then developing features which enhance the experience and guide our drivers throughout their experience, especially when things go wrong.

## Stress-free: Big Rocks

[View Details](#)

### Reliability

#### App Frameworks (Carbon)

Build the Uber Driver app product frameworks leveraged by program teams across Uber.

#### App Stability & Performance

Maintain a reliable and performant app everywhere, on every device.

#### App Release Management

Making the update process transparent and stress free for drivers.

### Ease

#### Pickups & Dropoffs

Enable safe, stress-free, and more efficient pickups and dropoffs.

#### Maps & Navigation

Integrated Maps & Navigation to help drivers and couriers work efficiently and stress-free.

#### Airports & Events

Create a fair and flexible marketplace and stress-free experience at airports and events.

### Recovery

#### Trip Failure Prevention

"Bumpers" that prevent common issues and flows that help drivers troubleshoot during the trip.

#### Cancellations

Improve the user experience and reduce the business cost of cancellations.

#### Cash Experience

Make sure drivers feel safe and have Uber's support during stressful disagreements with the rider.

Beyond the foundation and key aspects of the trip experience -- pickups, dropoffs, maps --

I want to highlight a couple of key areas of focus in 2018.

Cancellations are a \$250M expense. We want to improve the experience for both riders and drivers and reduce the cost to the business.

# Support Pillar

**Pillar Owners**

Jai Malkani

Janelle Sallenave

We had to play catch-up on their basic requests.

## Support: Problem Statement

[View Details](#)

Drivers encounter too many issues while driving and the burden to let us know is too high. Drivers often receive general and unempathic responses that don't fully address their very personal issues.

This makes drivers feel like Uber doesn't care about drivers or their experience.

[Gagan]

- Everybody knows about Uber. But not everyone knows that Uber has an opportunity that might work for them.
- We are in a time where we have a Flatlining of Signups & FTs at a 100K level (huge, but still flatlined).
- This problem is universal - across business lines, product, and markets. And the solution must also be universal - across the organization, functions, and teams.

## Support: Strategy Statement

[View Details](#)

Create a best-in-class support experience through the eyes of the Driver. We'll do this by focusing on three core pillars:

- **Frictionless:** Path of least resistance from question to answer; automate the easy stuff.
- **Personalized & Consistent:** Treat drivers as a segment-of-one, deliver the right answer every time.
- **Empathetic:** Uber deeply understands customer problems, advocates for drivers internally, and closes loops.

Drivers trust that every interaction will be amazing, and that their feedback will be used to improve experiences longer term.

### Pillar KPIs:

Agent Contact Rate

Support Sentiment

Support cSAT

[Abhishek]

# Support: Big Rocks

[View Details](#)

## Foundation

### Core Tech

Core engineering excellence work to improve Bliss' reliability and scalability.

### Compliance

CO handling of data meets all PII (GDPR) and financial compliance (Fidelity) obligations.

### System Health

Ensure that all partner facing support systems are highly reliable.

## Frictionless

### Answer Discovery

Make it easy for drivers to find the right answer, increasing % issues that are self service and improving agent-support experience by getting contacts to the right agents faster.

### Proactive & Self Service

Set drivers up for success through effective education and proactive outreach, Platform enabling other product teams at Uber to build self-service support experiences.

## Personalized

### Segmentation

Ensure our end-to-end support ecosystem can recognize a driver's relationship and status with us.

### Expanded Channels

Enhance drivers' experience through full Bliss integrations for new modalities.

### Contextual, Integrated Tools

Provide agents with seamless integrated context about the driver they're assisting and their issue.

### Improved Agent Management

Simplify management of 30k+ agents (permissioning + data).

## Empathetic

### Customer Care

Improve support quality by better assessing interactions, enabling agents to practice on real issues before handling customers, and empowering PMs to use Bliss.

### Support Quality

Ensure support is delivered in a timely, consistent and quality manner, resulting in high resolution and CSAT

# Relationship Pillar

**Pillar Owners**

Mike White

Mike Truong

We had to play catch-up on their basic requests.

## Relationship: Problem Statement

[View Details](#)

Drivers don't feel that they're treated fairly in their relationship with Uber. They feel we favor riders and our own interests over theirs.

[Gagan]

- Everybody knows about Uber. But not everyone knows that Uber has an opportunity that might work for them.
- We are in a time where we have a Flatlining of Signups & FTs at a 100K level (huge, but still flatlined).
- This problem is universal - across business lines, product, and markets. And the solution must also be universal - across the organization, functions, and teams.

## Relationship: Strategy Statement

[View Details](#)

Ensure that drivers feel valued,  
heard, respected.

**Valued** - recognize and appreciate drivers for their tenure and for going above and beyond. Provide benefits, perks, and rewards that demonstrate our long-term commitment to drivers as our most valuable partners.

**Heard** - actively seek feedback from drivers, act on that feedback, and close the loop.

**Respected** - establish and enforce clear standards of respect for everyone on the platform. Humanize drivers and create moments of connection that foster better interactions with riders.

### Pillar KPIs:

Driver Hour Retention

Connected Trips

Relationship  
Sentiment

Relationship Defect  
Rate

[Abhishek]

# Relationship: Big Rocks

[View Details](#)

## Foundation

### Infrastructure

Maintenance and enhancements to the systems that power all of the Relationship products

### Carbon

Rolling out Carbon to 100%.

### Segmentation & Personalization

Establish the canonical segmentation of our driver population so Uber teams can begin to personalize products based on data-derived attributes

## Valued

### Debit Card

Cash-back deal partnerships incl gas, free InstantPay, etc.

### Perks & Benefits

New perks portal that creates differentiated access to benefits.

### Milestones

Recognize and celebrate driver achievements on the Uber platform

### In-Person

Real world interactions where Uber shows appreciation to drivers

### Driver Recruiting

Formalize a Driver-Partner Recruiting strategy.

### Tippling

## Heard

### Uber Feedback

Build better products by listening to feedback from our customers, internalizing it and closing the loop when we make changes.

### Employee Empathy

Infuse customer obsession throughout the org through a series of immersion projects.

### Local Driver <=> Uber Connection

Create comprehensive platform for engaging with drivers that scales listening, inclusion of drivers in decision making, elevates and honors tenured drivers, and celebrates loyalty.

## Respected

### Profiles Experience

Win the hearts of our customers and build connection between them.

### Driver Quality (Profiles <=> Safety)

Improve safety perception on the platform by creating more trust between Riders and Drivers

### Rider Quality

Reinforce good rider behavior and discourage bad behavior through improved feedback loops.

### Ratings Anxiety

Fair and actionable rating experience.

### Deactivation Experience

Improve the warning and deactivation experience for drivers by ensuring that they understand why they are being deactivated and are treated with empathy.

Global

First, let's  
check out  
**the plan in  
a single view...**

# Driver Forward 2018 Global Strategy & Big Rocks

- Access
- Earnings
- Safety
- Support
- Vehicles
- Flexibility
- Stress-free
- Relationship



Aligned Interests		Earnings Leadership	Flawless Experience					Driver Quality	Spend Optimization
Reduce Rental Partner Overhead	Assign Global Hourly Partnerships	VS Payments Infra	Automated Access	New Driver Experience	Redesign Flow + System	Personalization	Reactivation + Re-Onboarding	Screening Excellence	Fusion
Fleet Growth	Multimodal Platform	Fleet Earnings	Consistency Framework	Fleet Owner Tools	Earnings Narrative	Fare Integrity	Carbon	Full Automated Compliance	Spend + Cost Optimization
VS Data Quality	Integrate Rental Partners	Setting and Achieving Goals	Clarity & Comprehension	Zero Tickets	Driver Payment Reliability	Infrastructure	Carbon	Reduce Theft + Increase Collections	New Signup Opportunities
VS Driver Growth + Retention	Reimagining DxOy	Core Pricing Model	Core Preferences	Platformize Prefs + Constraint Inputs	Infrastructure	New Prefs + Segments	Zero Defects	Carbon	Flexible Access Platform
Realistic Expectations	Spend Efficiency	Keep More	Rider Vetting	Rider Accountability	Magical Claims	Critical Safety Response	On Trip Safety	Proactive Monitoring + Detection	Scale US Hourly
Driver Surge	Flexibility Controls/Limits	Flexibility Guidance	Safe Driving Products	Pickups & Dropoffs	Maps & Navigation	Airports & Events	Cash Experience	Telematics Platform	Data Platform
CTB to Expeditions	Quantifying Flexibility	Integrated Flexible Earnings Experiences	App Frameworks (Carbon)	App Stability & Performance	App Release Management	Trip Failure Prevention	Core Tech	Safe Trip Intelligence	Proactive & Self Serve
Earnings Research	Monitoring	Tippling	Answer Discovery	Contextual, Integrated Tools	Customer Care	Compliance	Expanded Channels	Safety Education	Improved Agent Management
	Cancellations		Support Quality	Segmentation	System Health	Perks & Benefits	Uber Feedback	Ratings Anxiety	
			Infrastructure	Milestones	Employee Empathy	Rider Quality	Segmentation & Personalization		
			In-Person Appreciation	Local Driver <=> Uber Connection	Profile Experience	Driver Recruiting	Profile Safety		
			Deactivation Experience	Unified Driver Comms	Carbon				

Our plan is  
**global.**

# Our plan is **global.**

KPIs are global and include goals for each Mega-Region

Steering Committee includes strong global and courier representation

Pillar teams include a Global Partner for each Mega-Region and, where applicable, a courier partner

## From an international perspective...

### Ts

**Driver Obsession**

Putting customers first was refreshing and engaging - and deeply aligned with the passion of our global team

**Cross-Functional Strategy**

Having a single, unifying strategy and objective unlocks everything else

**Telling Our Story**

Sharing our story of change, aligning deeply with marketing to have fewer, bigger campaigns ensures key messages breakthrough

### Bs

**Engagement at the Outset**

Int'l needs to be involved early enough to meaningfully shape roadmaps and pillar selection, not as an afterthought

**Prioritization/Clarity**

Need to know where we invest geographically and what everyone can expect as a result of that prioritization (i.e. timing + roadmap commitments)

**International Research**

Need to know who is responsible for research in each MR, of what type, and on what timeline

**Ongoing Collaboration**

More communication and engagement for Int'l as plans shift and trade-offs are made - it will happen

2018 planning  
has already been  
**deeply**  
**collaborative.**



## Slide 173

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- 1 **+matt.shroder@uber.com** what were the dates of this event?  
Andrew Macdonald; 12/13/2017 6:21:20 PM
- 1 **November 14 and 15**  
Zach Smith; 12/13/2017 6:14:47 PM
- 2 **thx**  
Andrew Macdonald; 12/13/2017 6:21:20 PM



All Orgs,  
through **First Class**  
& **the Driver Summit,**

have provided key input into Tech  
planning to ensure our thinking is  
grounded in global insights.

# Tech's most important deliverable, **Carbon**, is **Global from Day 1**

PMM and ProductOps are leading an incredible, cross-functional group to share this complete app rebuild with drivers around the world.

Each Pillar is driven by a cross-functional, global team...

Pillar Owner	Functional Partners	Global Partners	Big Rock Owners
	MARKETING	US&C	BR #1
	PRODUCT OPS	LATAM	BR #2
	DATA	INDIA	BR #3
	RESEARCH	APACx	Functional Partners
	COURIER	EMEA	Functional Partners

We will track Tech work in the

# **Unified Product Roadmap**

And HQ support is available through

# **Global Communities**

**As One.**

# Eng Excellence Pillar

**Pillar Owners**

Akash Garg  
Carl Gibbs

Hello, my name is Akash and I lead up the Driver Engineering teams. I'm going to talk about one of our big engineering initiatives for 2018. First, let's talk about the problem.

## Problem Statement

A **large** (and growing) number of managed services add an increasingly large amount of **maintenance** and **upgrade** work to our teams.

A screenshot of a complex spreadsheet or data table with many columns and rows, likely representing a list of managed services and their associated work items. The table is dense with text and numbers, and some cells are highlighted in blue.

Over the past year, the Driver team has seen a surge in the number of services that we need to support. Additionally, these services use a vast array of different technologies and frameworks. There isn't a common way to interface, deploy or understand them.

Costs of doing migrations such as Goldstar and All-Active are becoming

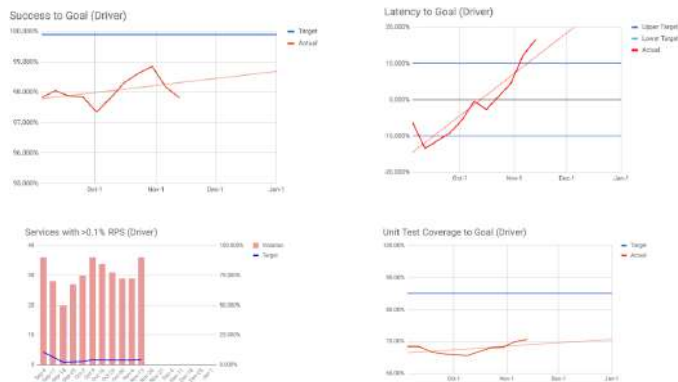
increasingly more difficult. All 100+ services need to be updated each and every time there is a new requirement or migration.

And we fully expect that 2018 will have a series of new migrations.

We simply cannot manage all of these and make meaningful progress on our product goals.

## Problem Statement

Service health has **eroded** in 2017 despite our best efforts to incentive and reward this work.



Additionally, the health and quality of these services have suffered over the course of the year.

We track 4 key health indicators for every service we own. In 2017, despite setting goals to improve these, we

have seen a regression in our  
quality on all of these  
dimensions.

## **Problem Statement**

Our 2018 velocity will be severely impaired unless we take immediate and concrete action towards service health and consolidation

**In summary, we need to take a new approach improving our service health. Our 2018 velocity will be severely impaired unless we take immediate and concrete action towards service health and consolidation.**



## Strategy



**Reduce** — Identify logical groupings of our services and arrive at a manageable number

**Modernize** — Along with Project Ark, work towards technology platform consolidation

**Dedicate** — Set aside explicit time and resourcing to accomplish these goals

**Rails** — Provide ongoing guidance and feedback to teams to ensure we maintain quality in our services

### Pillar KPIs:

Operational Health

Engineering Productivity

Project Ark KPIs

Fusion is the name of our multi-quarter effort to eliminate this technical debt and lay a solid foundation for the future. There are 4 key elements to the strategy around Fusion. Reduce: Identify logical groupings of our services and arrive at a manageable number

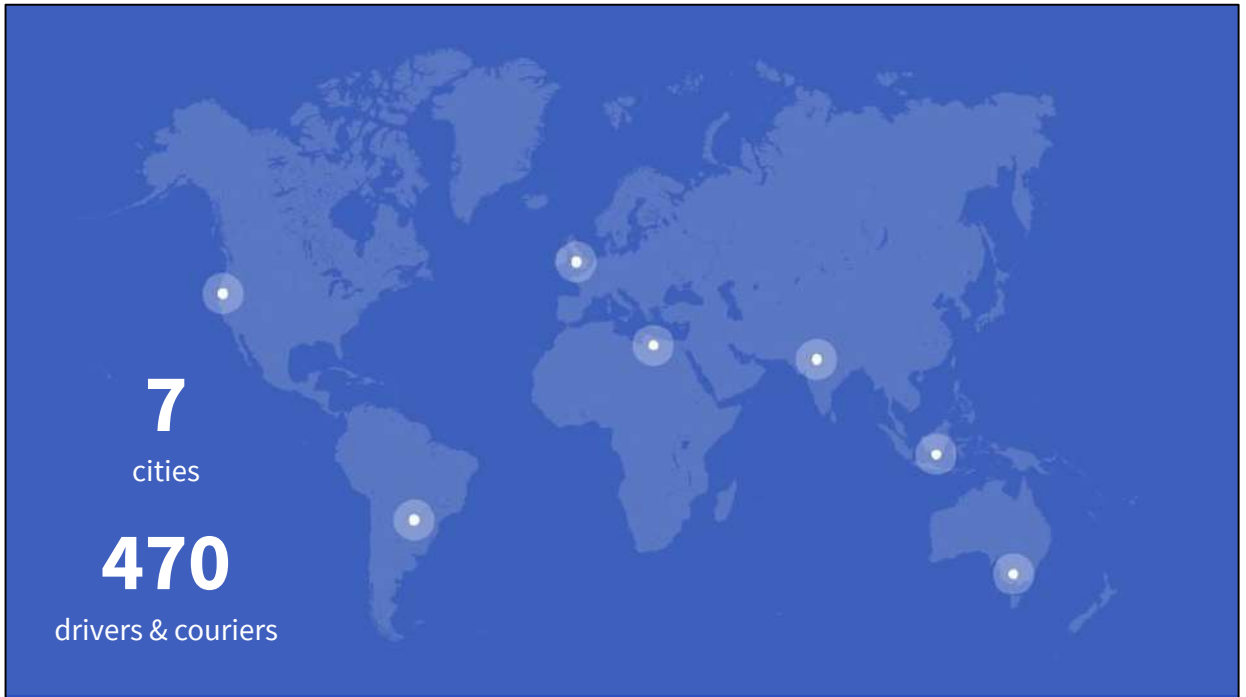
Modernize — Along with Project Ark, work towards technology platform consolidation

Dedicate — Set aside explicit time and resourcing to accomplish these goals

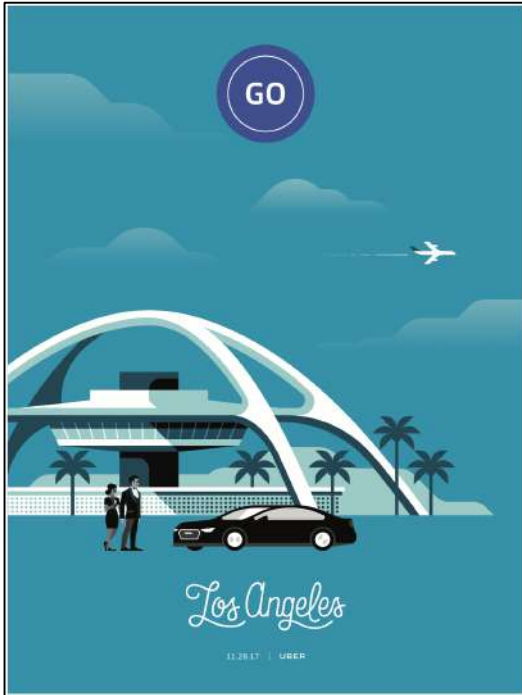
Rails — Provide ongoing guidance and feedback to teams to ensure we maintain quality in our services

# Carbon

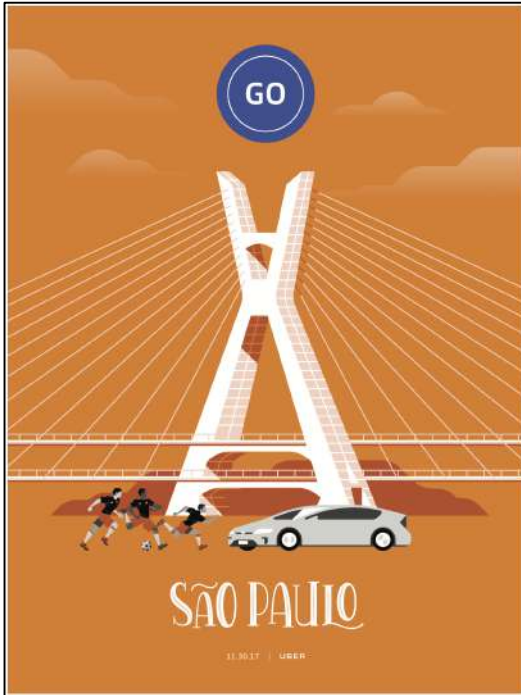
Adam Gluck  
Darrell Stone



Over the past two weeks we have launched our Carbon beta in 7 cities around the world. We now have 470 drivers testing the experience and providing us with amazing feedback. Here are some of our favorite moments from the launches around the world.



Builders welcomed Drivers - and invited to go through the download experience - on iOS ...



Builders welcomed Drivers - and invited to go through the download experience - on iOS ...



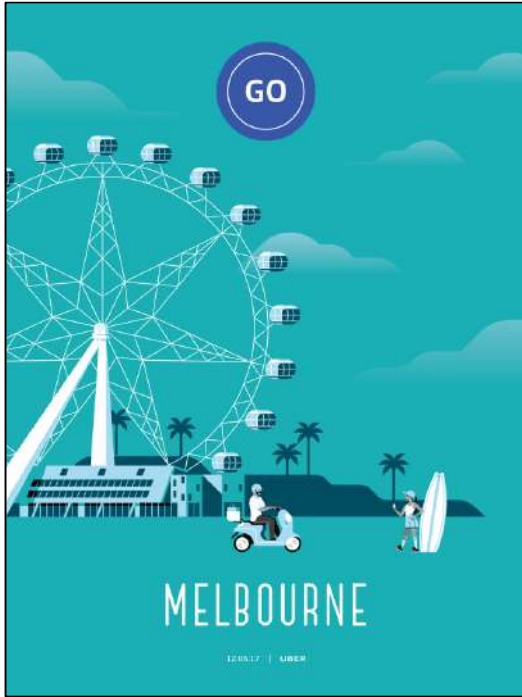
Builders welcomed Drivers - and invited to go through the download experience - on iOS ...



Builders welcomed Drivers - and invited to go through the download experience - on iOS ...

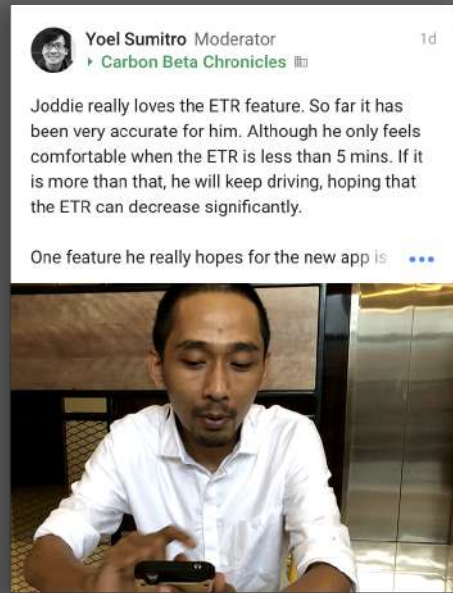




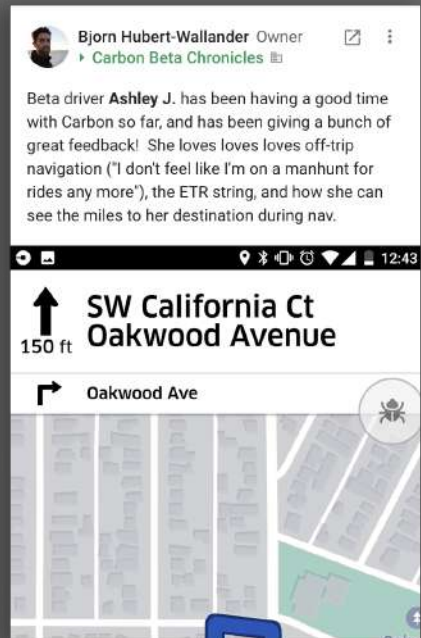


Drivers & couriers like...

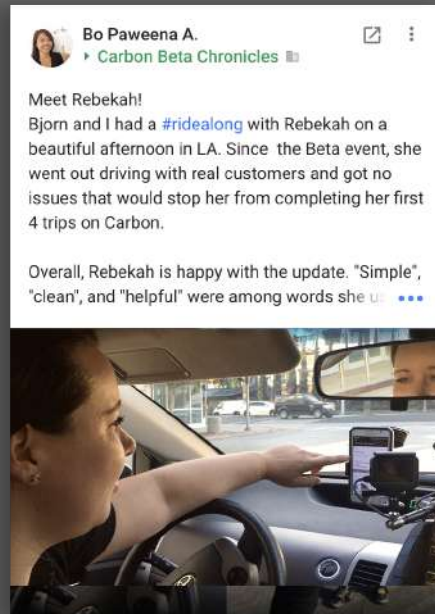
Estimated time to request  
("ETR")



## Off-trip navigation



Simpler, cleaner designs



Drivers & couriers want...

## Quest tracking

0  
VOTE

### Promotions

**Heidi Paddock**

@heidl\_paddock · 7 days ago

Hello again, I miss having the "promotions flag" on the front screen to track my progress in that promotion. I liked having the flag show with the amount of rides I had completed. I like knowing where I am at all times without having to go find this info inside the app. I also noticed the "5-7" rush hour add \$3 wasn't calculating and I couldn't find it last night inside the app. I picked up two rides between those hours and was not notified if I had received an add \$3 for those rides.

Thanks!

VOTE

FOLLOW

3 replies

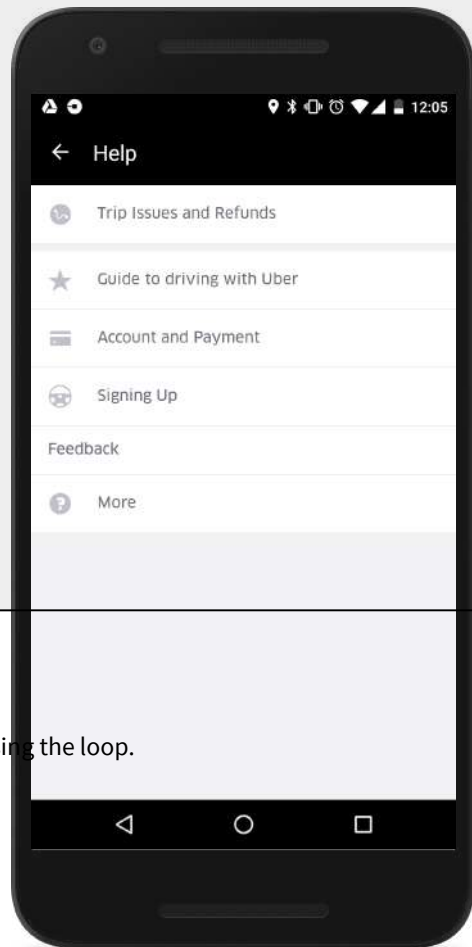
Oldest first

Driver forum

## Dialogs, not Monologues

Providing drivers with feedback channels - and closing the loop.

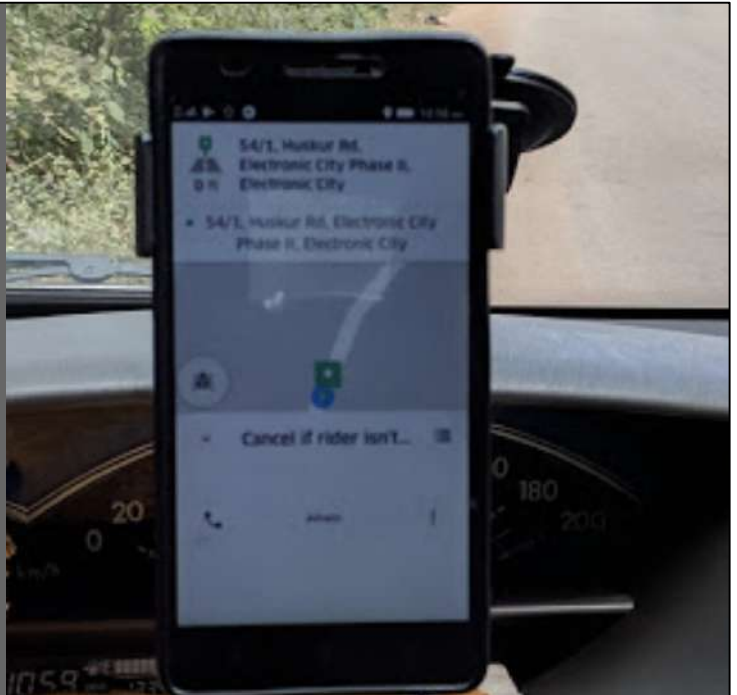
Better in-app  
support



## Dialogs, not Monologues

Providing drivers with feedback channels - and closing the loop.

Error-free trip flow



## By the Numbers

18,000

Total Trips

66%

Carbon Opt In

<sup>1</sup>  
>99%

Crash Free Rate

Drivers have already completed 18,000 trips on Carbon. In terms of Uber numbers, we know this is small, but it represents a massive leap forward for us as we strive to put the final touches on the future of the Uber earning experience

Drivers have access to both Alloy and Carbon, so we are watching Carbon Opt in closely. Right now 66% globally. This is lower than we'd like but not totally surprising given some of the low level fixes we've had to make in the first few weeks (crashes, UI glitches, etc). We're optimistic this will improve, but are actively outreaching to drivers showing less engagement with Carbon to make sure we understand exactly where they are struggling.

Performance is a critical aspect of Carbon, we are proud to be at a > 99% crash free rate in the Carbon build drivers are currently using.

## Slide 202

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- 1            **is this true? +stone@uber.com**  
Yuhki Yamashita; 12/13/2017 3:36:01 PM
- 2            **i'm asking because android**  
Yuhki Yamashita; 12/13/2017 3:20:04 PM
- 1            **That's what health line showed last night with new release. Was going  
to voiceover we saw some issues with crashes on android but they  
appear to be resolved**  
Darrell Stone; 12/13/2017 3:36:01 PM

Building together

Dialogues, not monologues



## Dialogs, not Monologues

Providing drivers with feedback channels - and closing the loop.

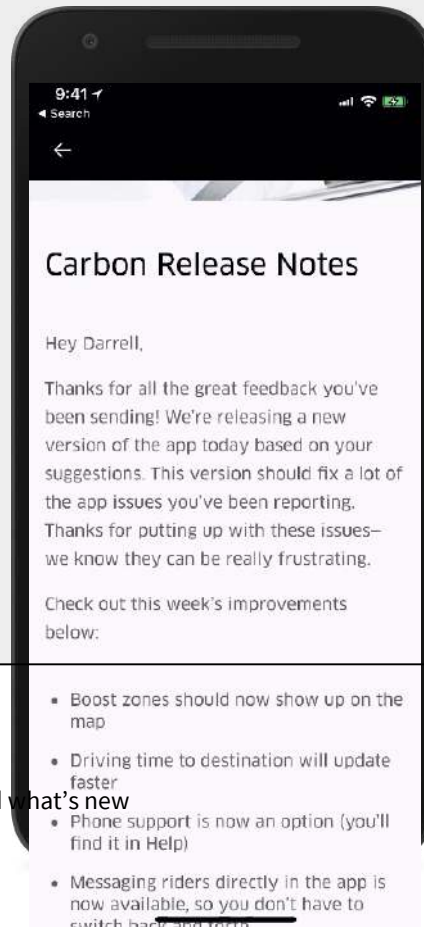
Lunches, not  
Launches



## Lunches, not Launches

Before scaling globally, we want to make sure we infuse the driver perspective into every layer of the Carbon experience.

Closing the loop



## Weekly Release Notes

Providing drivers with a snapshot of what's fixed and what's new



We also have professional videographer teams in each beta city - and these teams captured how the GLH event went down, but also hung around for 3 days afterwards to capture various activities including home visits (like this one in Jakarta), driver lunches, and ridealongs

Global rollout  
expected to begin  
Q1 2018

[t.uber.com/carbon](https://t.uber.com/carbon)



500+ members (just call it out in VO)

# Driver Marketing 2018

In 2017,  
**“CHANGE”** was  
our core marketing  
concept. And **180** was  
our first major driver  
campaign (ever!)

In 2018, our second large-scale driver campaign will be **[something awesome!]** based on the strategy of True Partnership.

Stay tuned: Q1

# First, who are we targeting?

## New Drivers

01

### Smart Growth

Efficiently acquire and groom high quality drivers-partners who will drive when and where we need them.

## Existing Drivers

02

### Experience & Relationship

Continue repairing our relationship and drive loyal preference by building trust, bringing joy and delivering high quality experiences.

## Gen Pop & Riders

03

### Reputation

Establish Uber as a leader in the gig economy and immunize for the future.

How will our  
messaging work  
**across these  
audiences?**

# 2018 Driver Communications Hierarchy

BRAND

OPPORTUNITY

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

# 2018 Driver Communications Hierarchy

<b>BRAND</b>	OPPORTUNITY
<b>DRIVER STRATEGY</b>	TRUE PARTNERSHIP

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

# 2018 Driver Communications Hierarchy

<b>BRAND</b>	OPPORTUNITY
<b>DRIVER STRATEGY</b>	TRUE PARTNERSHIP
<b>CAMPAIGN CONCEPT</b>	TBD!

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

# 2018 Driver Communications Hierarchy

<b>BRAND</b>	OPPORTUNITY		
<b>DRIVER STRATEGY</b>	TRUE PARTNERSHIP		
<b>CAMPAIGN CONCEPT</b>	TBD!		
<b>KEY MESSAGES</b>	It's the fair, flexible way to earn	It's flawless, supportive experience	I have a partner in my success

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

# 2018 Driver Communications Hierarchy

<b>BRAND</b>	OPPORTUNITY			
<b>DRIVER STRATEGY</b>	TRUE PARTNERSHIP			
<b>CAMPAIGN CONCEPT</b>	TBD!			
<b>KEY MESSAGES</b>	It's the fair, flexible way to earn	It's flawless, supportive experience	I have a partner in my success	
<b>CAMPAIGNS</b>	CARBON	DRIVER QUALITY	OPPORTUNITY (PERKS, BENEFITS, ++)	TBD

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

# 2018 Driver Communications Hierarchy

<b>BRAND</b>	OPPORTUNITY		
<b>DRIVER STRATEGY</b>	TRUE PARTNERSHIP		
<b>CAMPAIGN CONCEPT</b>	TBD!		
<b>KEY MESSAGES</b>	It's the fair, flexible way to earn	It's flawless, supportive experience	I have a partner in my success
<b>CAMPAIGNS</b>	CARBON	DRIVER QUALITY	OPPORTUNITY (PERKS, BENEFITS, ++)
<b>ON-GOING INITIATIVES</b>	THE 8 PILLARS OF DRIVER FORWARD		

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

# 2018 Driver Communications Hierarchy

<b>BRAND</b>	OPPORTUNITY		
<b>DRIVER STRATEGY</b>	TRUE PARTNERSHIP		
<b>CAMPAIGN CONCEPT</b>	COMING SOON!		
<b>KEY MESSAGES</b>	It's the fair, flexible way to earn	It's a flawless, supportive experience	I have a partner in my success
<b>CAMPAIGNS</b>	CARBON	DRIVER QUALITY	OPPORTUNITY (PERKS, BENEFITS, ++)
<b>ON-GOING INITIATIVES</b>	THE 8 PILLARS OF DRIVER FORWARD		

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

# Next steps

## **Q1 Campaigns**

(180 style without the 180 messaging)

**True Partnership brief** and  
campaign concept development

## **Carbon Global Launch**

## **Narratives for key Pillars**

(Earnings, Access)



**slido.com:**  
#globaldriver



# Thank you!

- Thank you to everyone for their work to bring this together.
- Thank you to Aaron for ushering us to this point and handing this off so elegantly.
- This strategy of **True Partnership** is an incredible foundation for 2018
- In 2017 we had to focus on the fundamentals - really listening to our customers and delivering on their needs.
- In 2018, **this strategy is much more sophisticated** - balancing driver needs, rider needs, and Uber's business needs. I'm excited to see this in action.
- **Forward** is how Uber ships globally, cross-functionally, cross-organizationally - let's keep refining and improving this model
- We, collectively, have the power to make a tremendous impact on our drivers globally. That's a rare opportunity in life. Let's take full advantage of it.

