

KEY TAKEAWAYS:

CONSUMER ENGAGEMENT WITH RIDE SHARING APPS HAS GROWN OVER THE HISTORY OF OUR SURVEY.

CONSUMERS WHO HAVE DOWNLOADED BOTH UBER AND LYFT USE UBER SLIGHTLY MORE OFTEN.

AVERAGE SELF-REPORTED SPEND PER RIDE TICKED UP Q/Q FOR BOTH UBER AND LYFT.

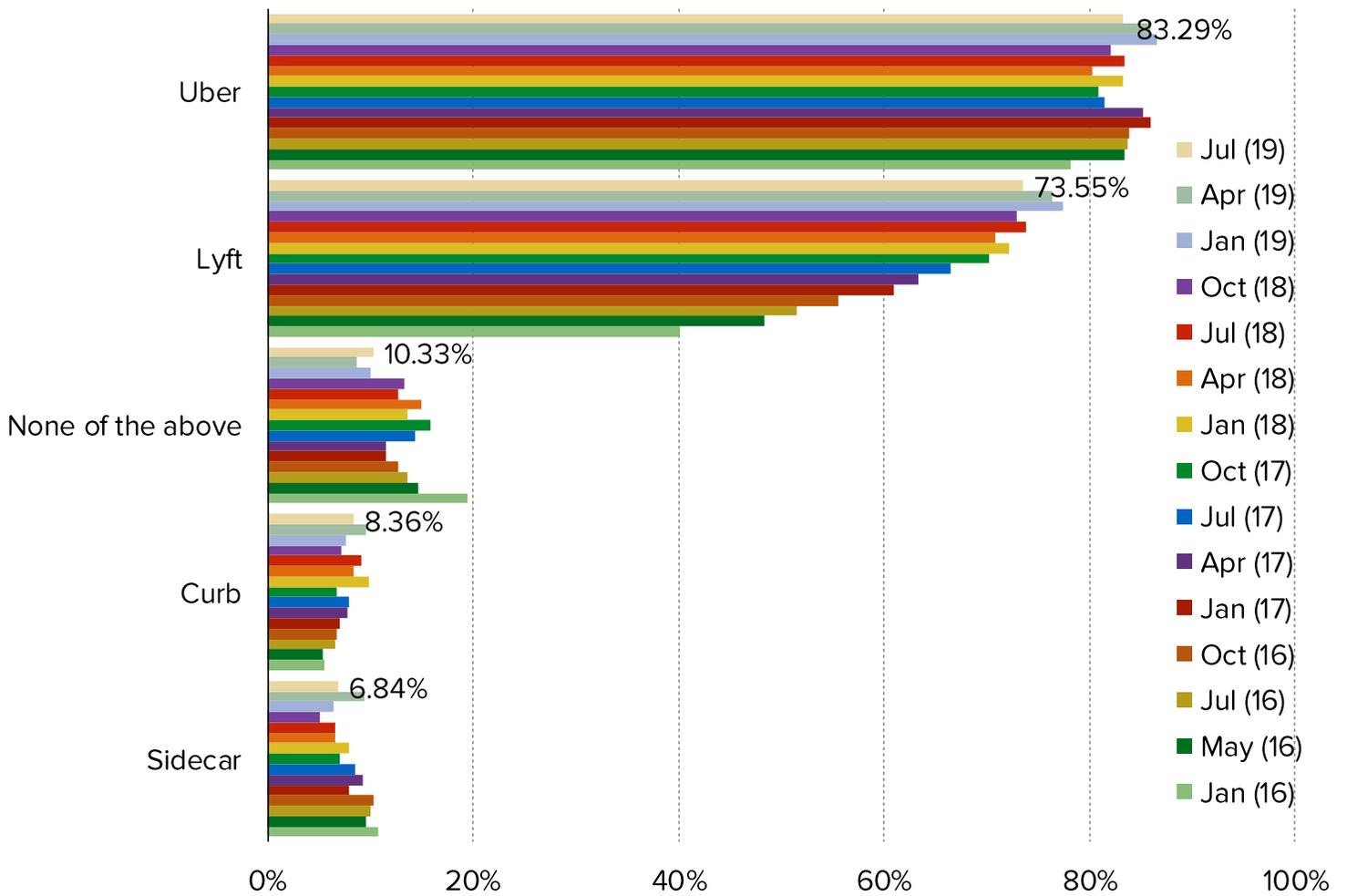
AN INCREASING PLURALITY OF UBER AND LYFT USERS DECIDE WHICH TO TAKE BASED ON WHICHEVER ONE IS CHEAPER.

DRIVER SENTIMENT FEEDBACK FAVORS UBER OVER LYFT (HOWEVER, FEEDBACK WAS SLIGHTLY WORSE Q/Q FOR BOTH UBER AND LYFT).

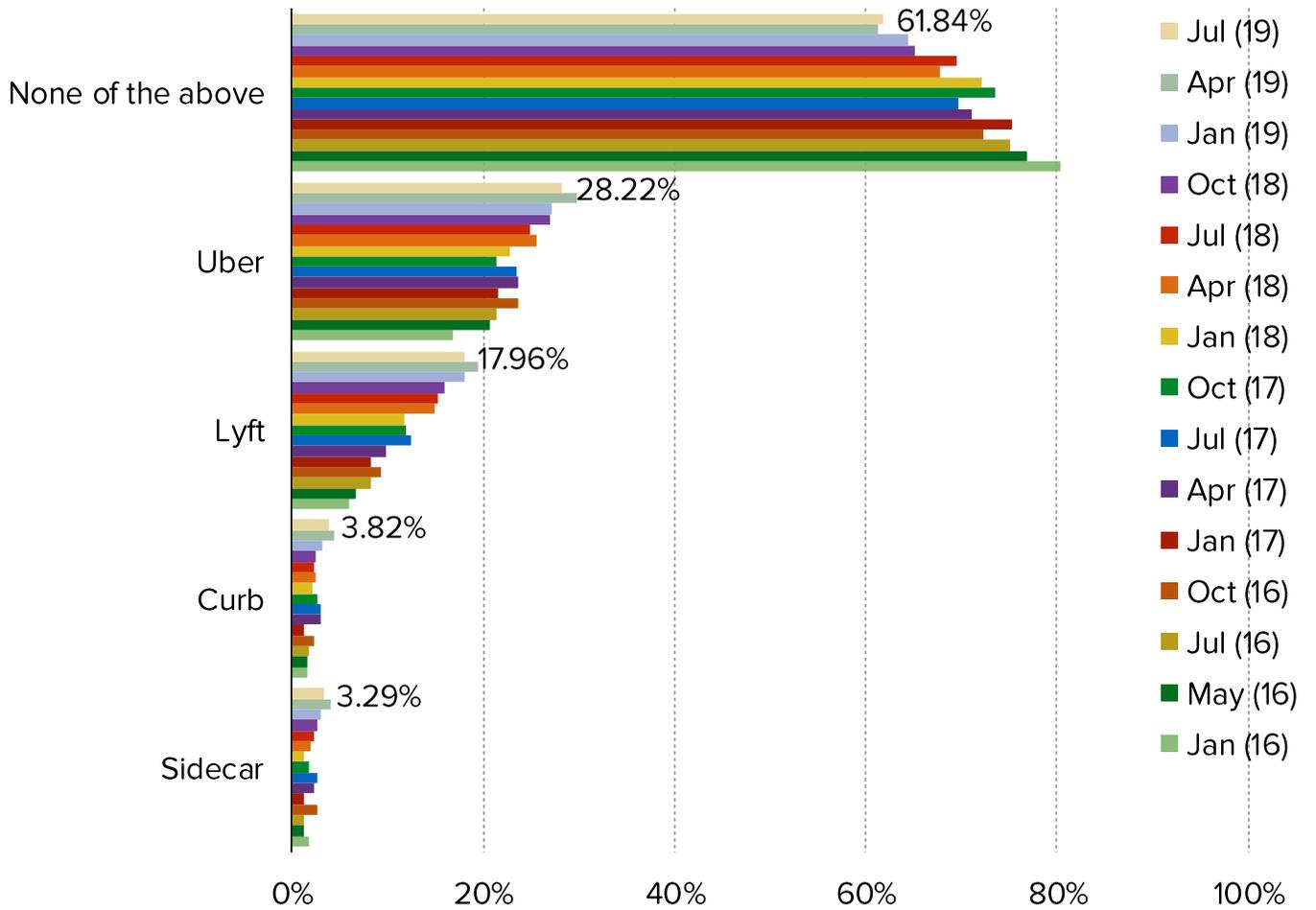
INCREASED TAKE RATES OR REDUCED DRIVER INCENTIVES WOULD HAVE CONSIDERABLE IMPACT ON DRIVER BEHAVIOR.

RIDE SHARING APPLICATIONS

ALL CONSUMERS - AWARENESS

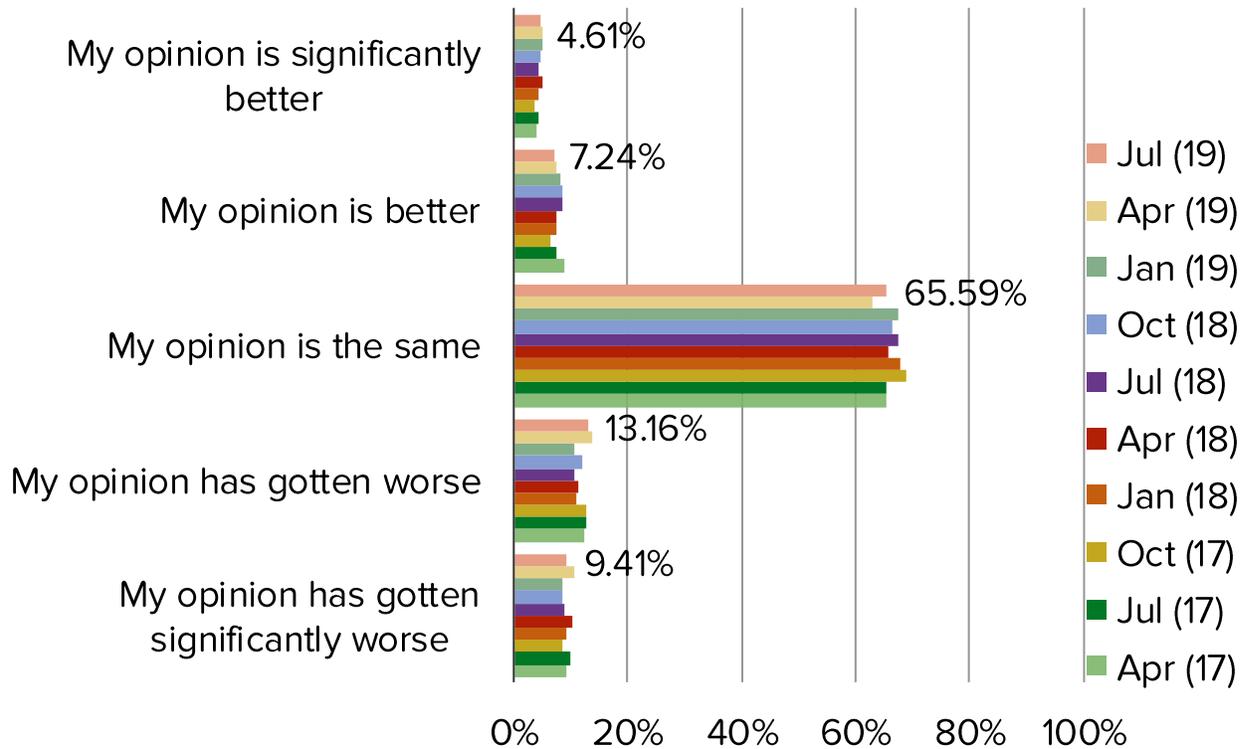


ALL CONSUMERS - APP DOWNLOADED ON THEIR PHONE

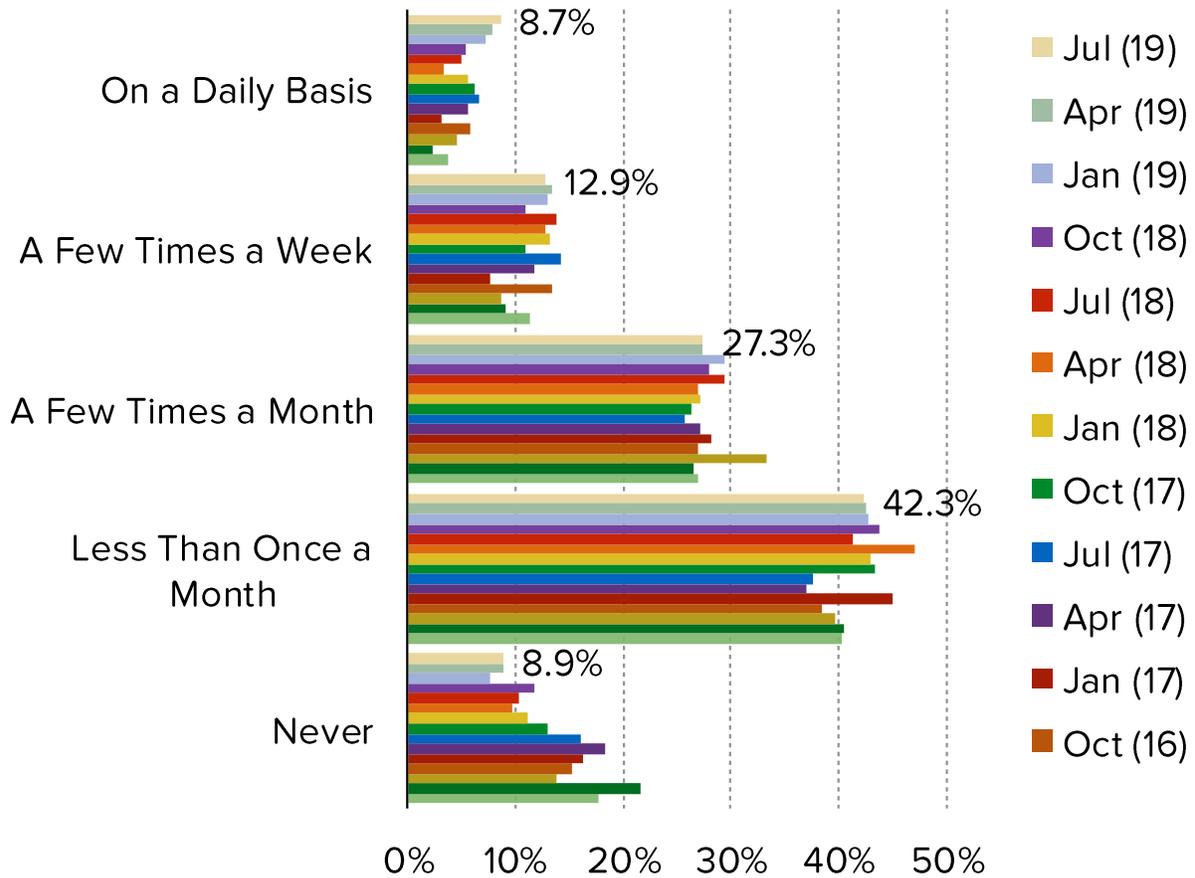


HAS YOUR OPINION OF UBER CHANGED IN THE PAST YEAR?

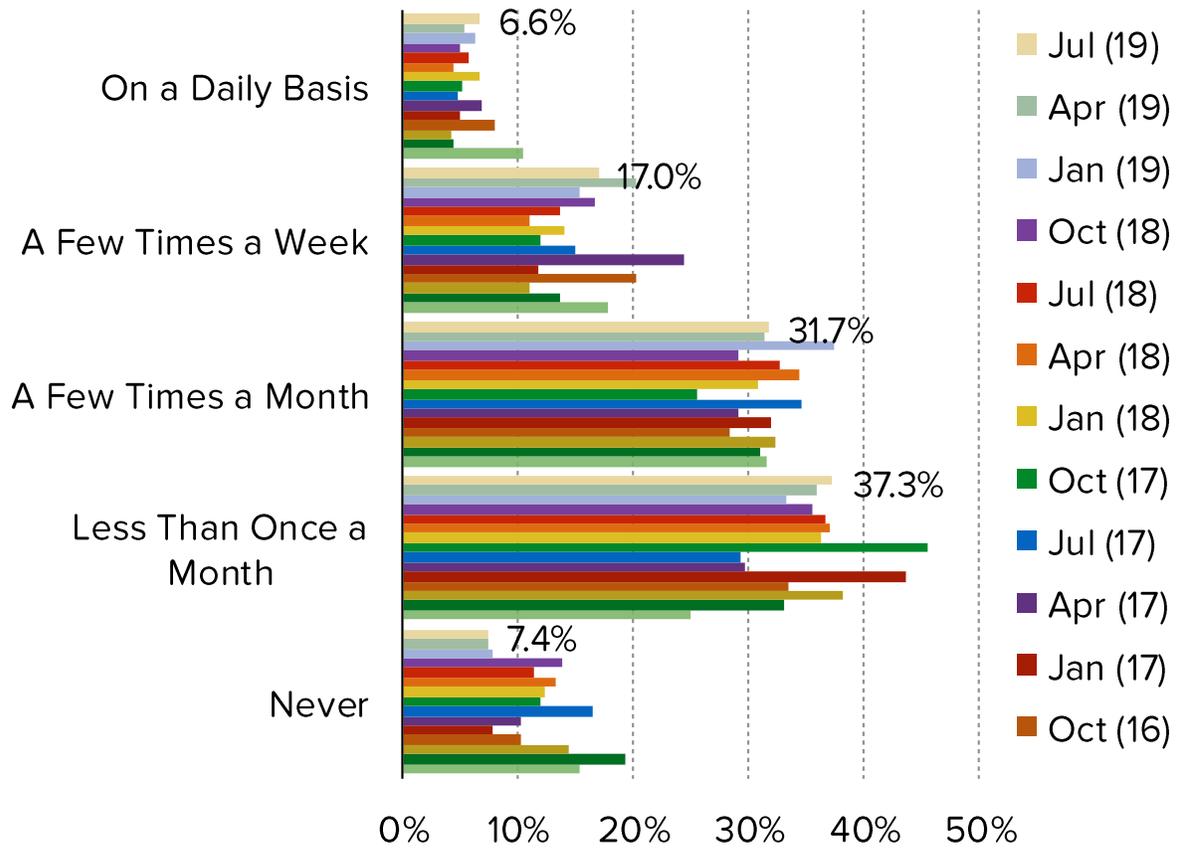
All Consumers



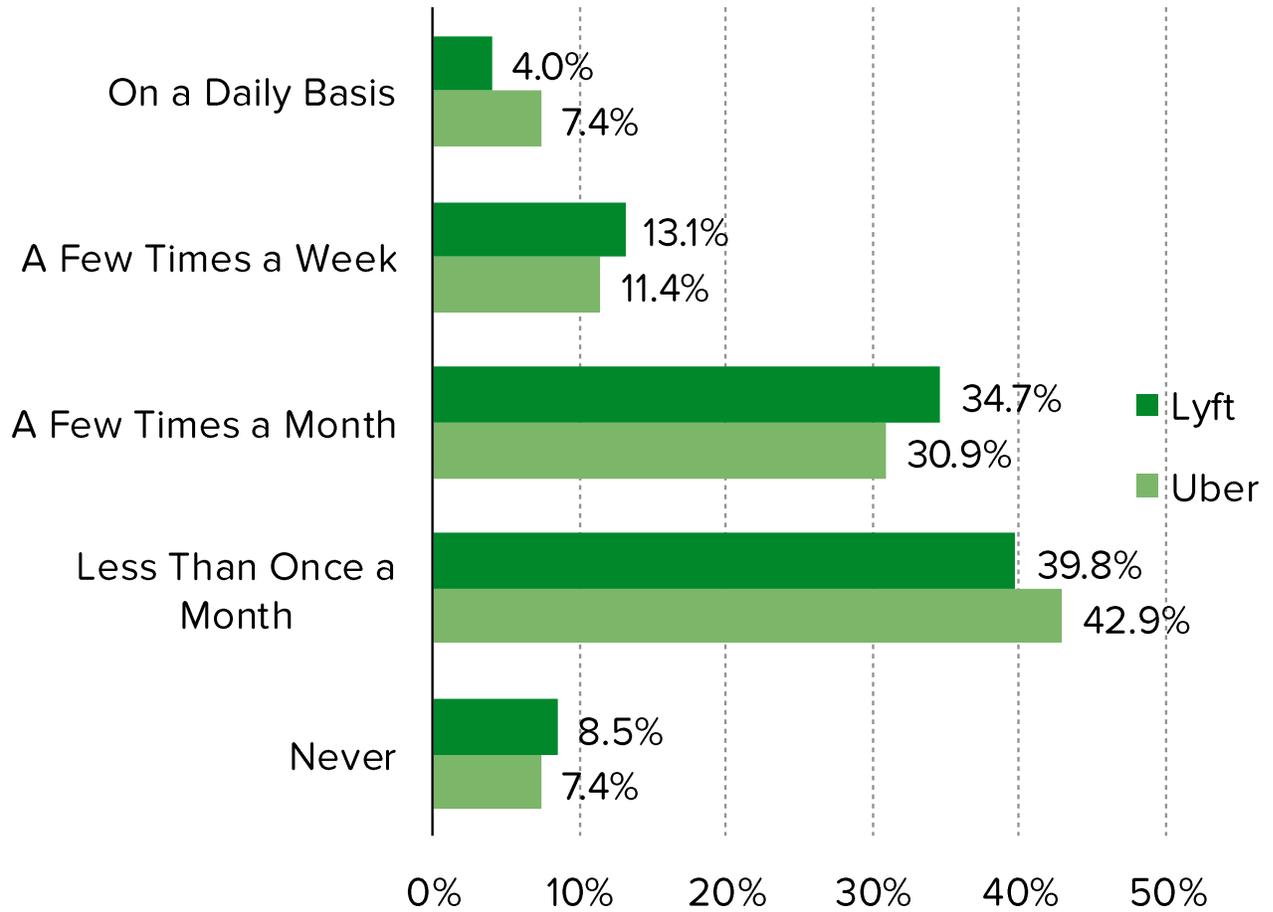
UBER USAGE FREQUENCY (BY THOSE WHO HAVE THE APP DOWNLOADED)



LYFT USAGE FREQUENCY (BY THOSE WHO HAVE THE APP DOWNLOADED)



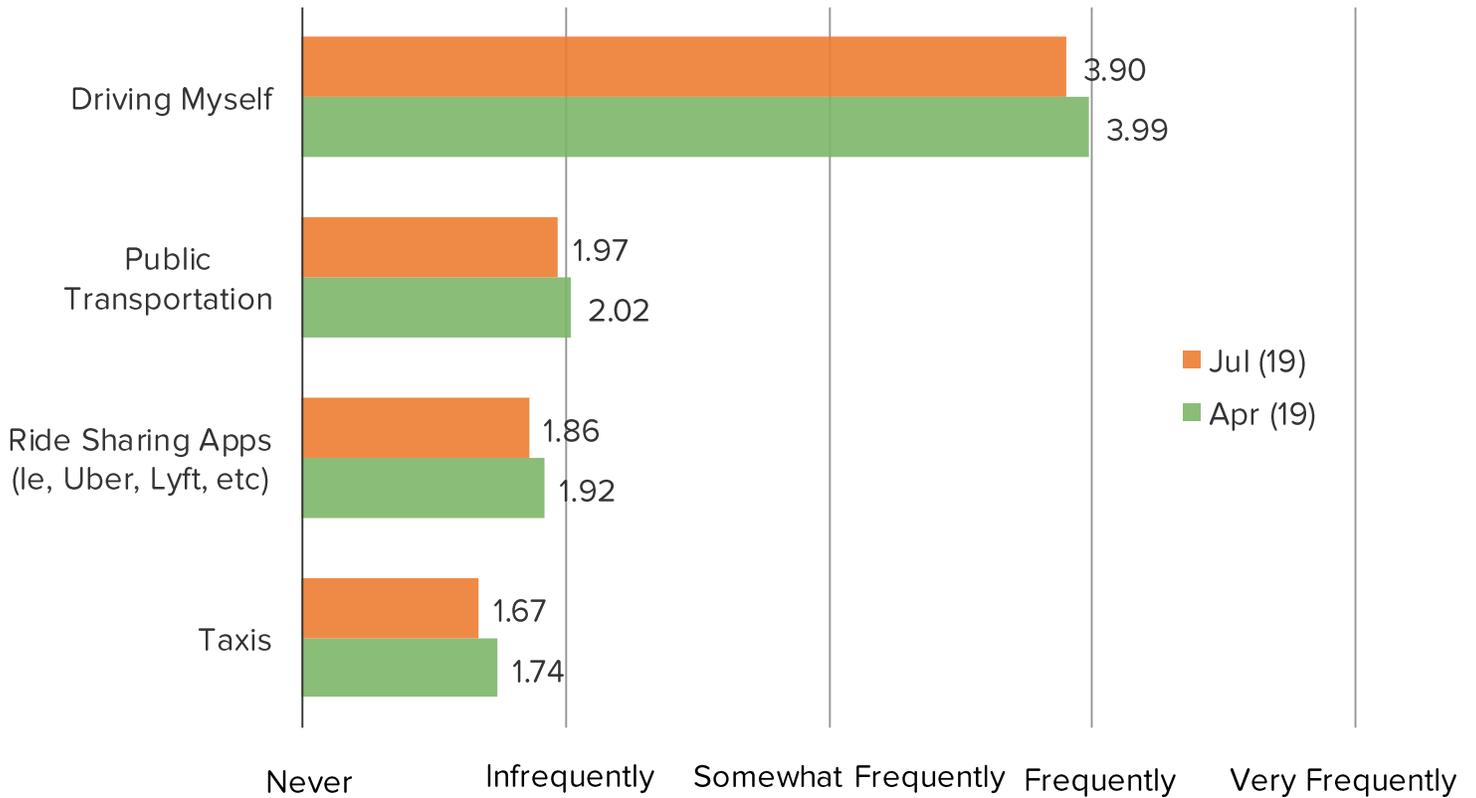
APP USAGE (RESPONDENTS WHO HAVE DOWNLOADED BOTH UBER AND LYFT ON THEIR PHONES)



Ride Sharing

HOW OFTEN DO YOU USE THE FOLLOWING FORMS OF TRANSPORTATION?

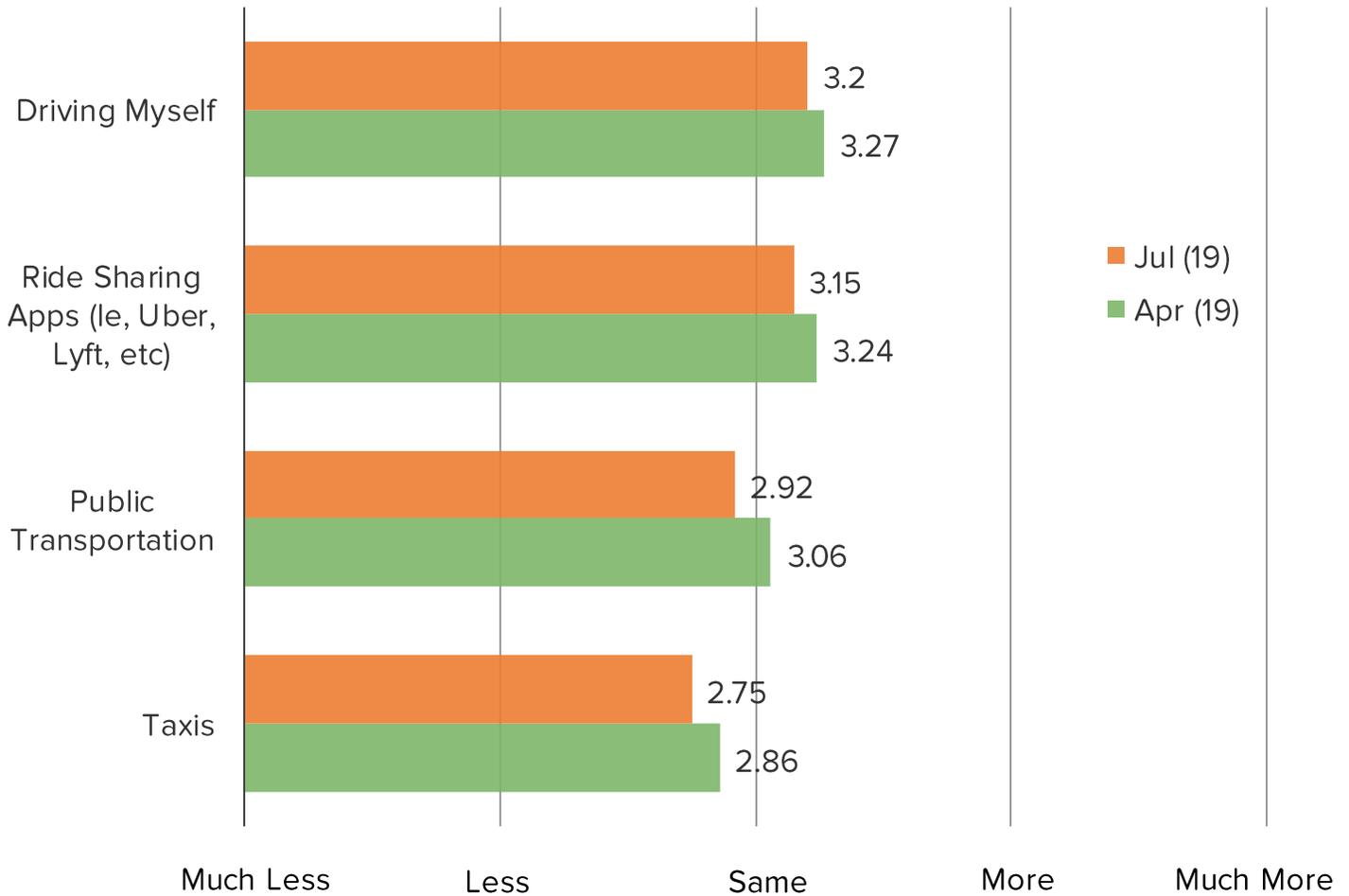
Posed to all respondents.



Ride Sharing

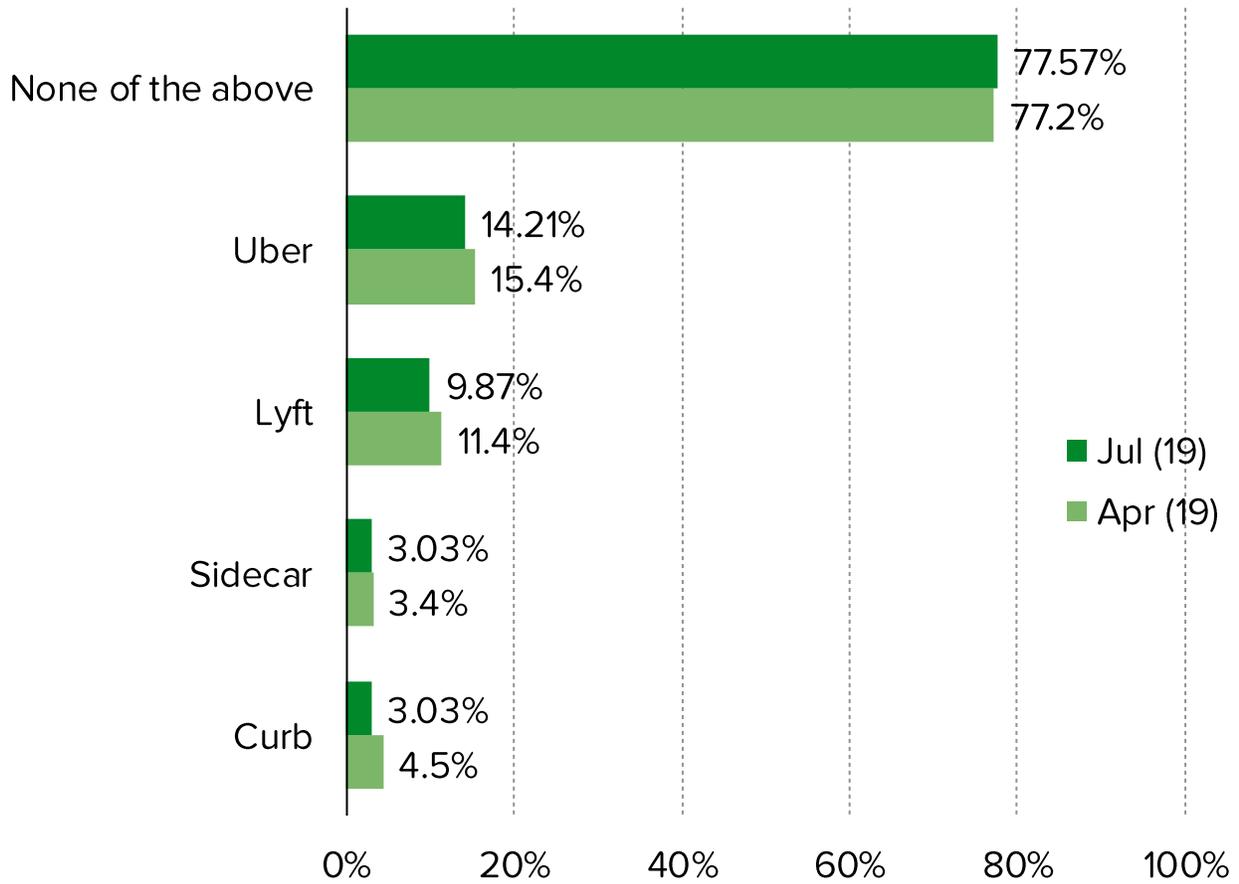
HAVE YOU CHANGED HOW OFTEN YOU USE THE FOLLOWING COMPARED TO ONE YEAR AGO?

Posed to respondents who use these forms of transportation.



**ARE YOU ENROLLED IN REWARDS PROGRAMS WITH ANY OF THE FOLLOWING?
(SELECT ALL THAT APPLY)**

Posed to all respondents.

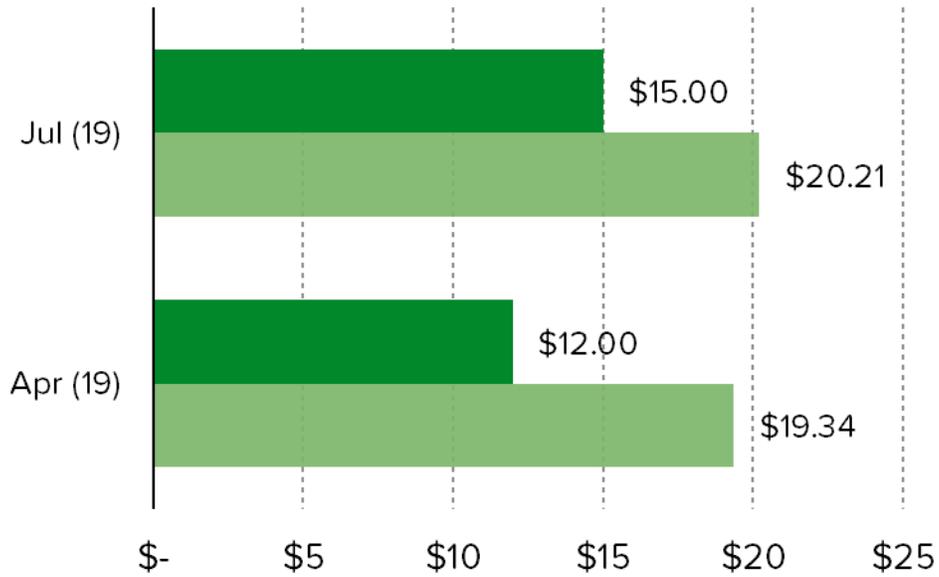


Ride Sharing

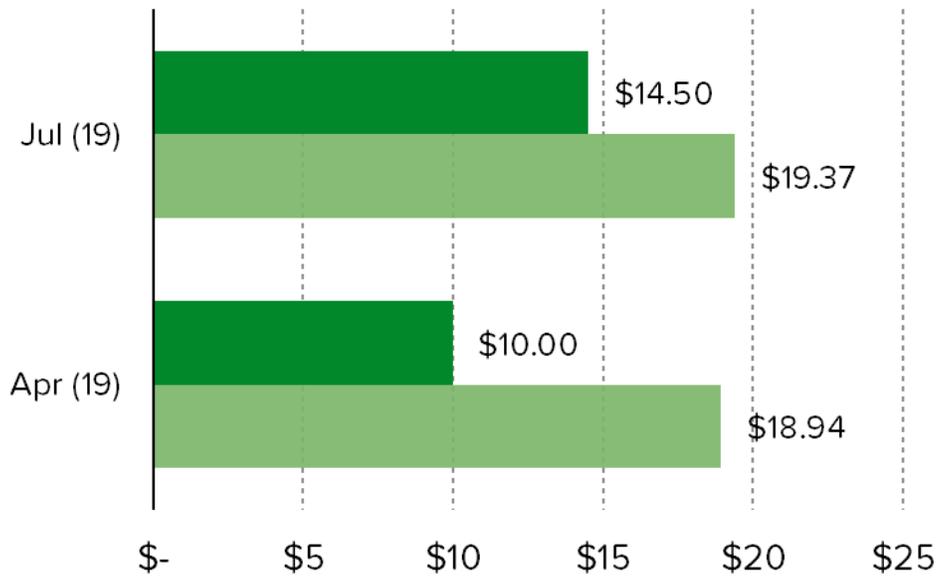
ON AVERAGE, HOW MUCH DO YOU SPEND ON A TYPICAL RIDE WITH... (FILL-IN)

Posed to users of Uber and/or Lyft.

UBER



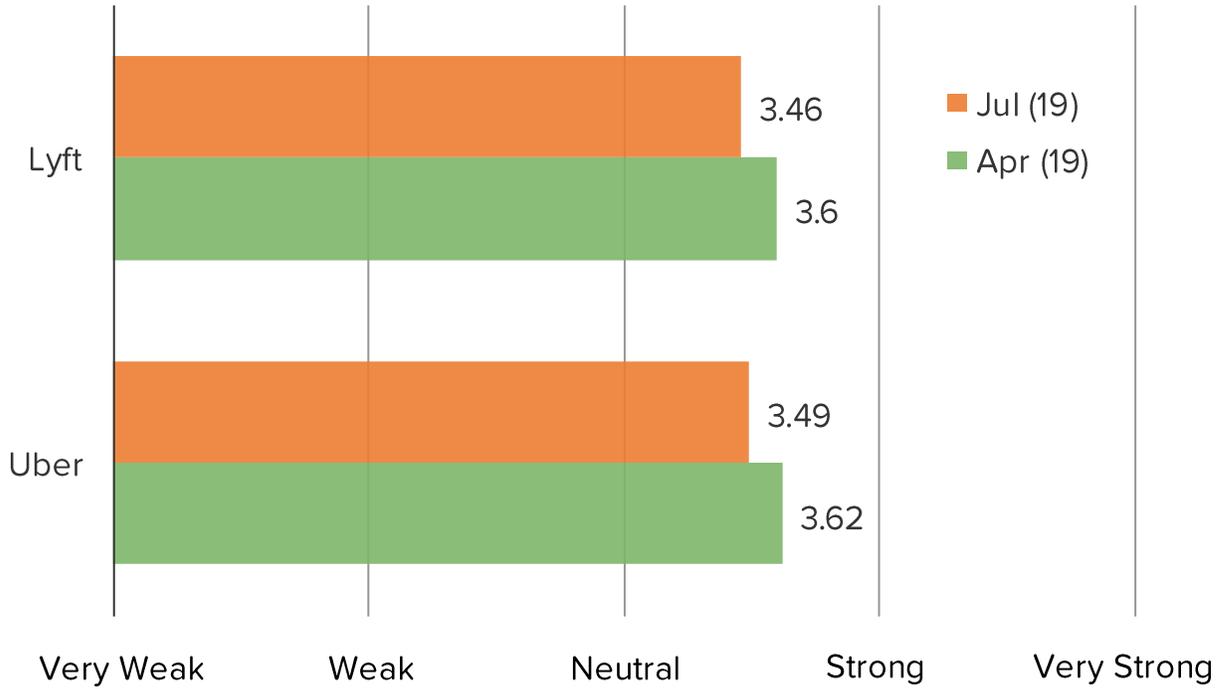
LYFT



Ride Sharing

WHAT IS YOUR OPINION OF THE VALUE IN USING THIS SERVICE?

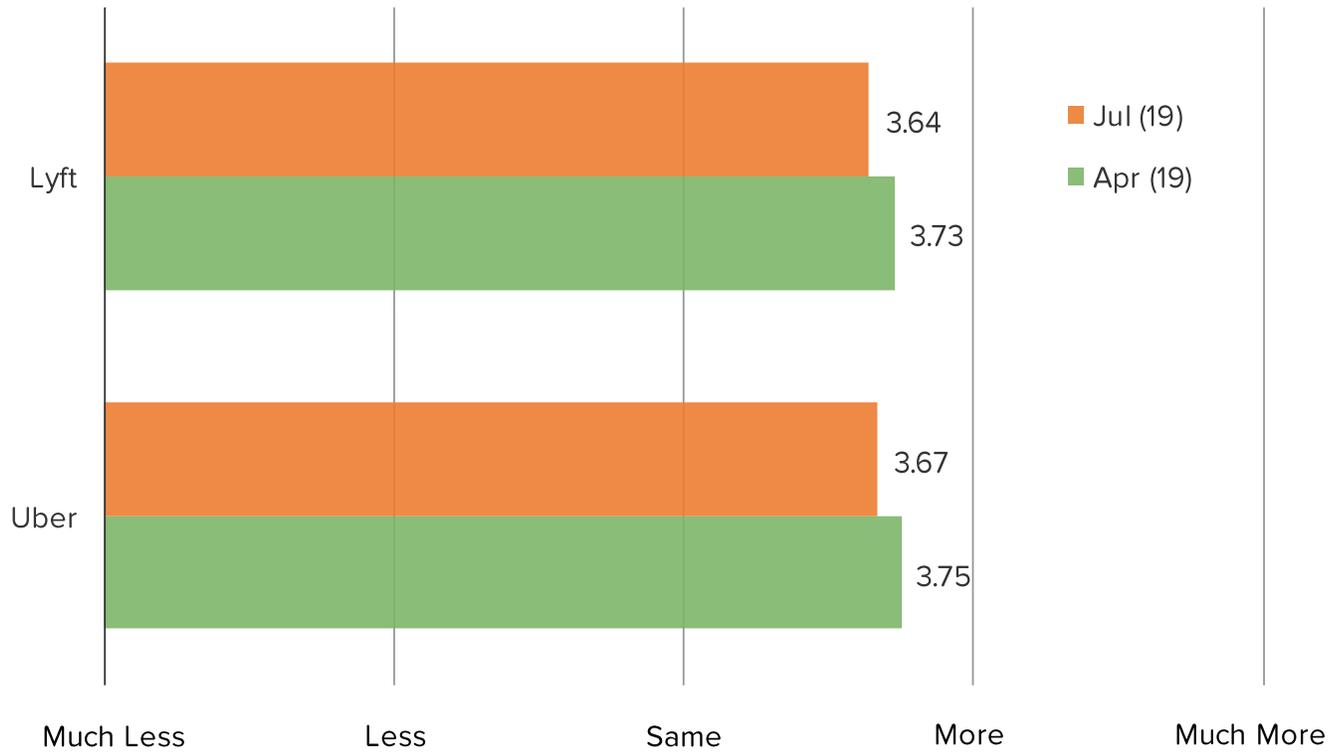
Posed to users of Uber and/or Lyft.



Ride Sharing

WHAT IS YOUR OPINION OF THE CONVENIENCE OF USING THIS SERVICE COMPARED TO ALTERNATIVE MEANS YOU WOULD USE TO TRAVEL?

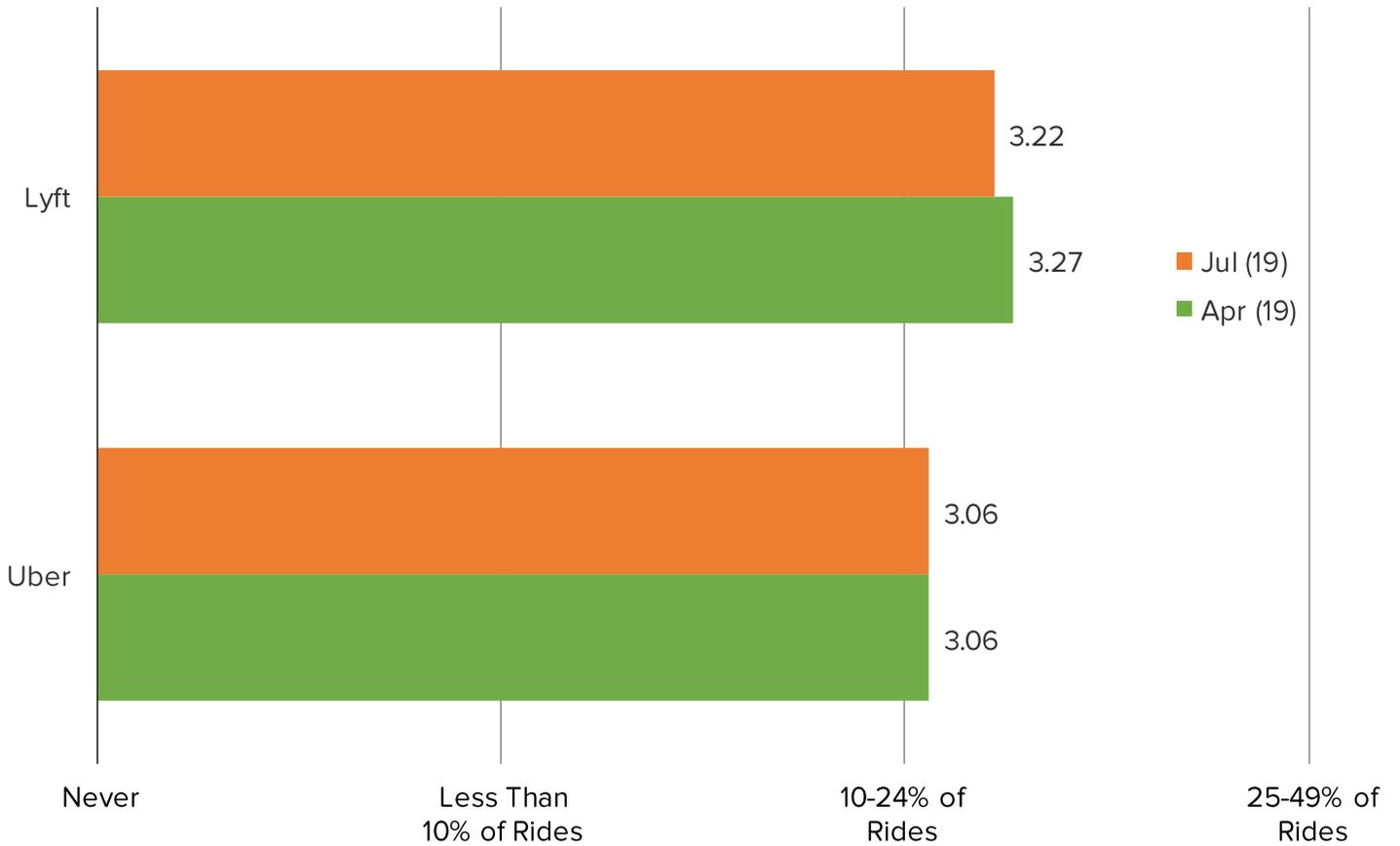
Posed to users of Uber and/or Lyft.



Ride Sharing

HOW OFTEN DO YOU USE POOLED RIDES (IE. WHERE YOU ARE NOT GUARANTEED TO BE THE ONLY PASSENGER IN THE CAR), IN ORDER TO PAY A LOWER FEE FOR THE RIDE?

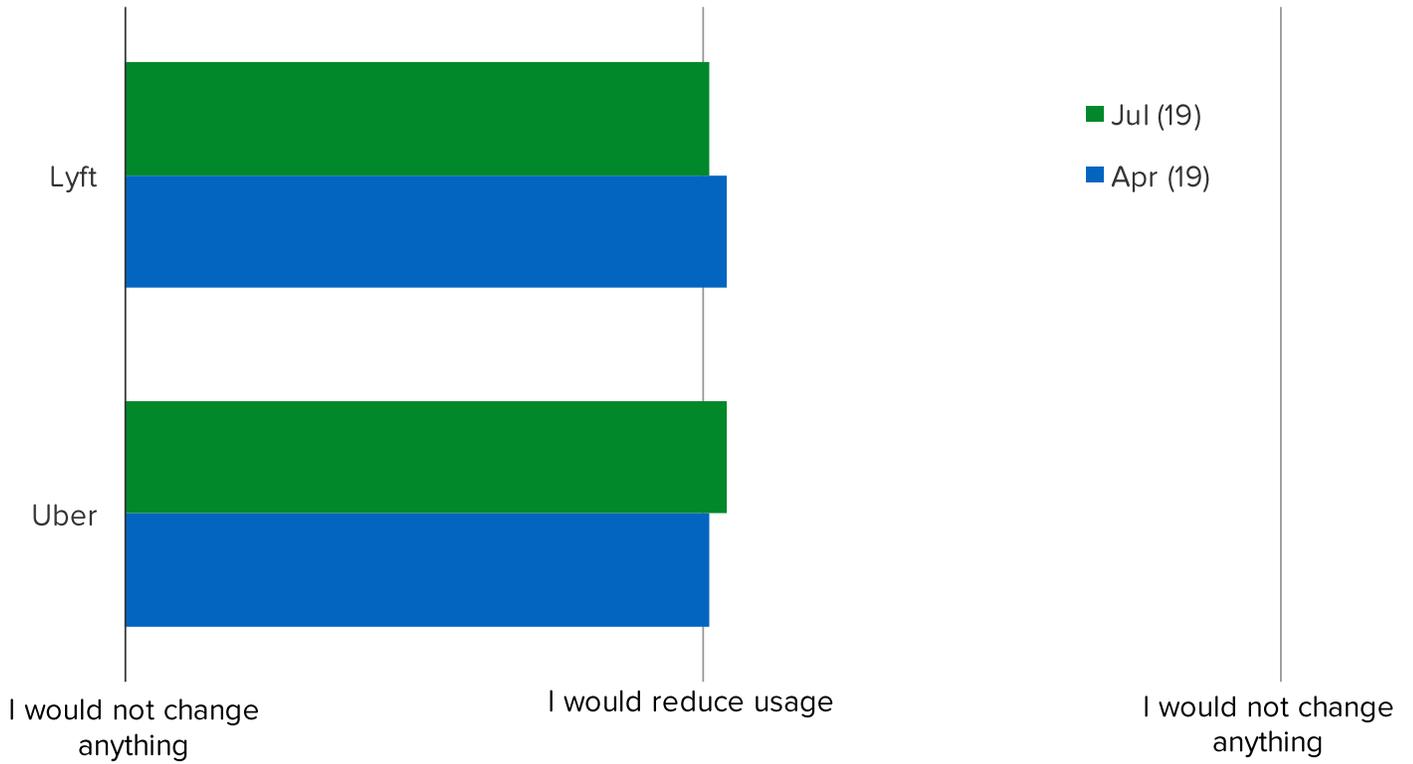
Posed to users of Uber and/or Lyft.



Ride Sharing

WHAT WOULD YOU DO IF THEY INCREASED PRICES FOR RIDES BY 10-15%?

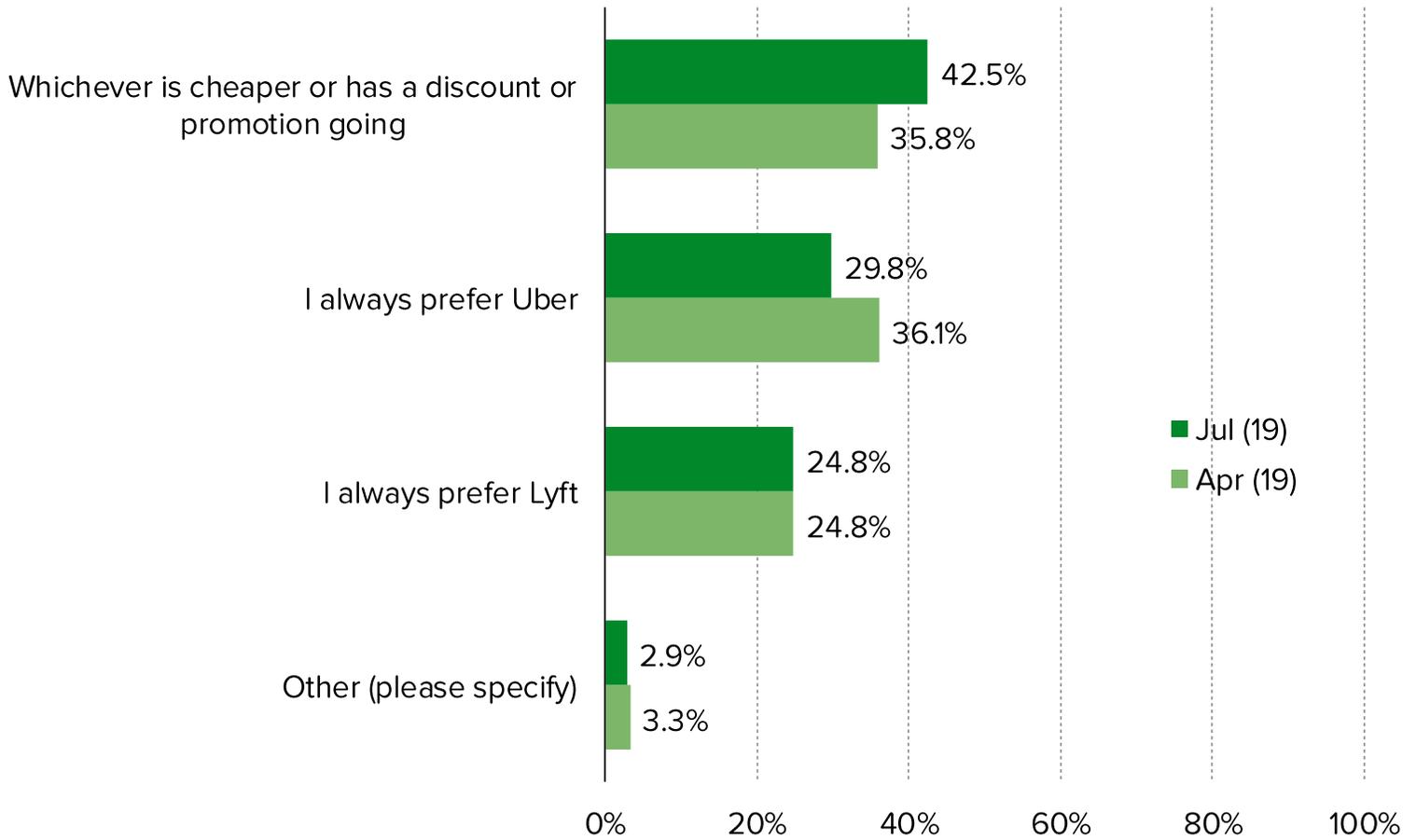
Posed to users of Uber and/or Lyft.



Ride Sharing

HOW DO YOU DECIDE WHETHER TO USE UBER OR LYFT OR OTHER RIDE SHARING APPS WHEN YOU NEED TO USE ONE?

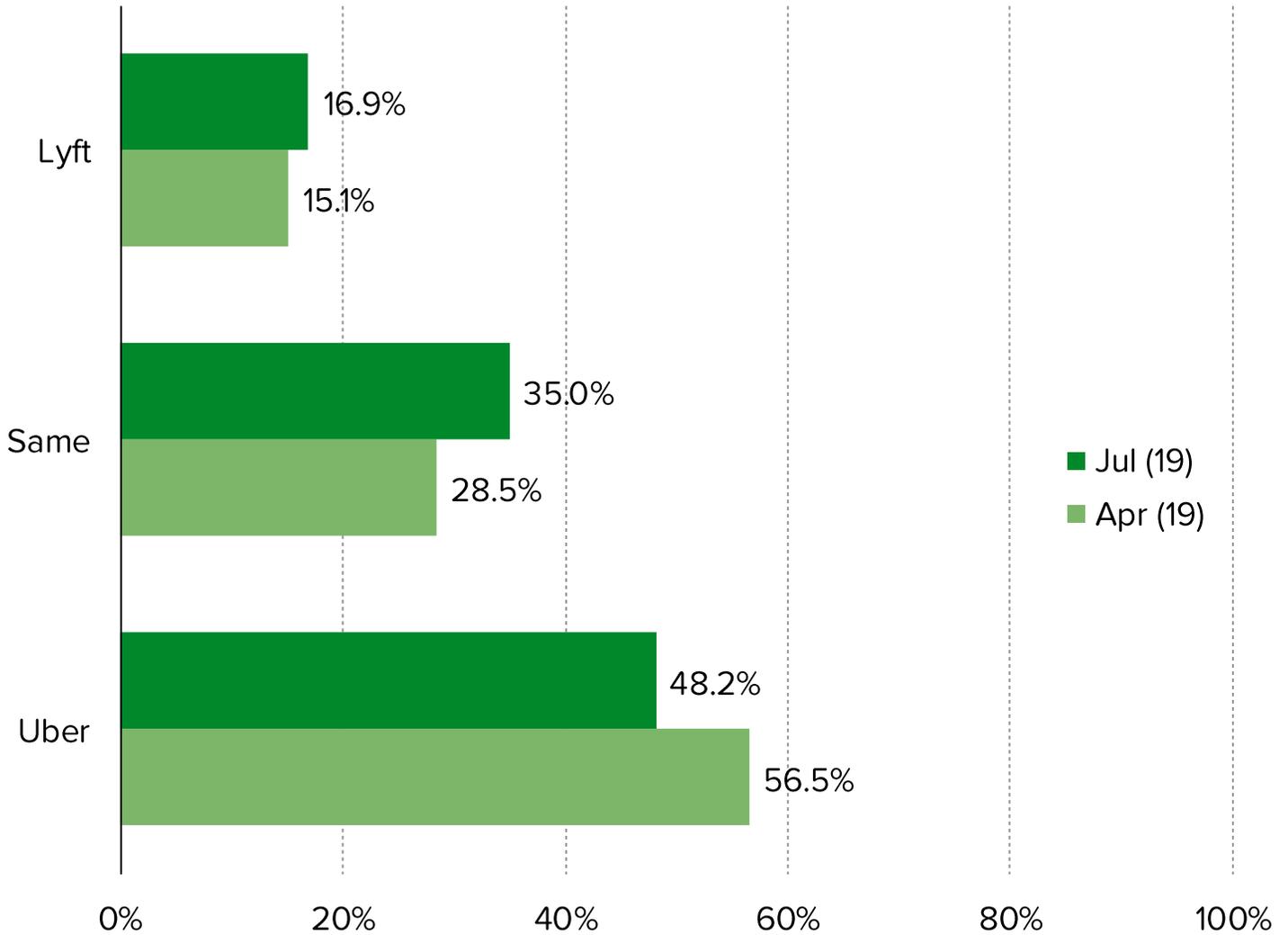
Posed to users of Uber and/or Lyft.



UBER AND LYFT DRIVERS

IN YOUR OPINION, WHICH IS BETTER FOR DRIVERS?

Posed to Uber and/or Lyft drivers.

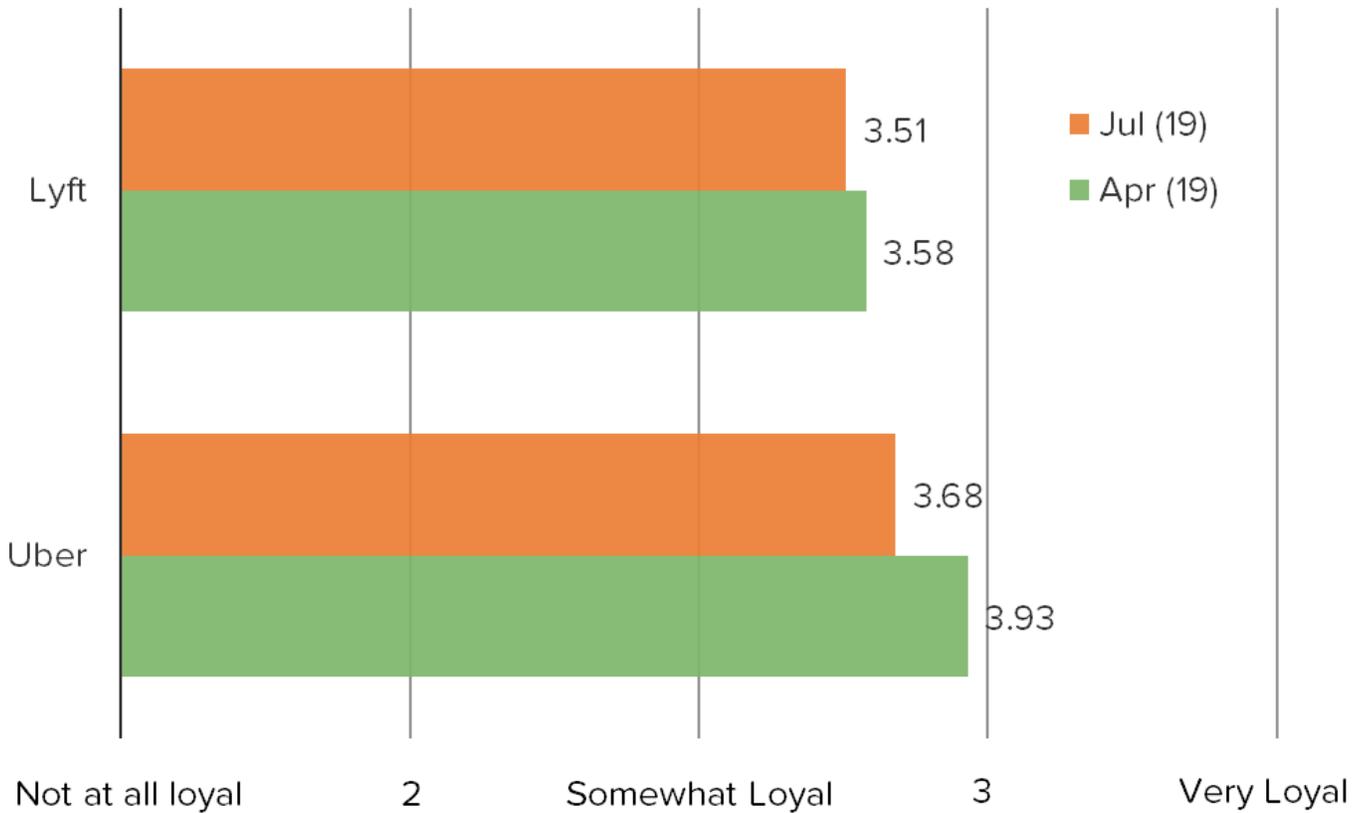


N = 200+ Uber and Lyft Drivers

Ride Sharing

HOW LOYAL ARE YOU TO DRIVING FOR...

Posed to Uber and/or Lyft drivers.

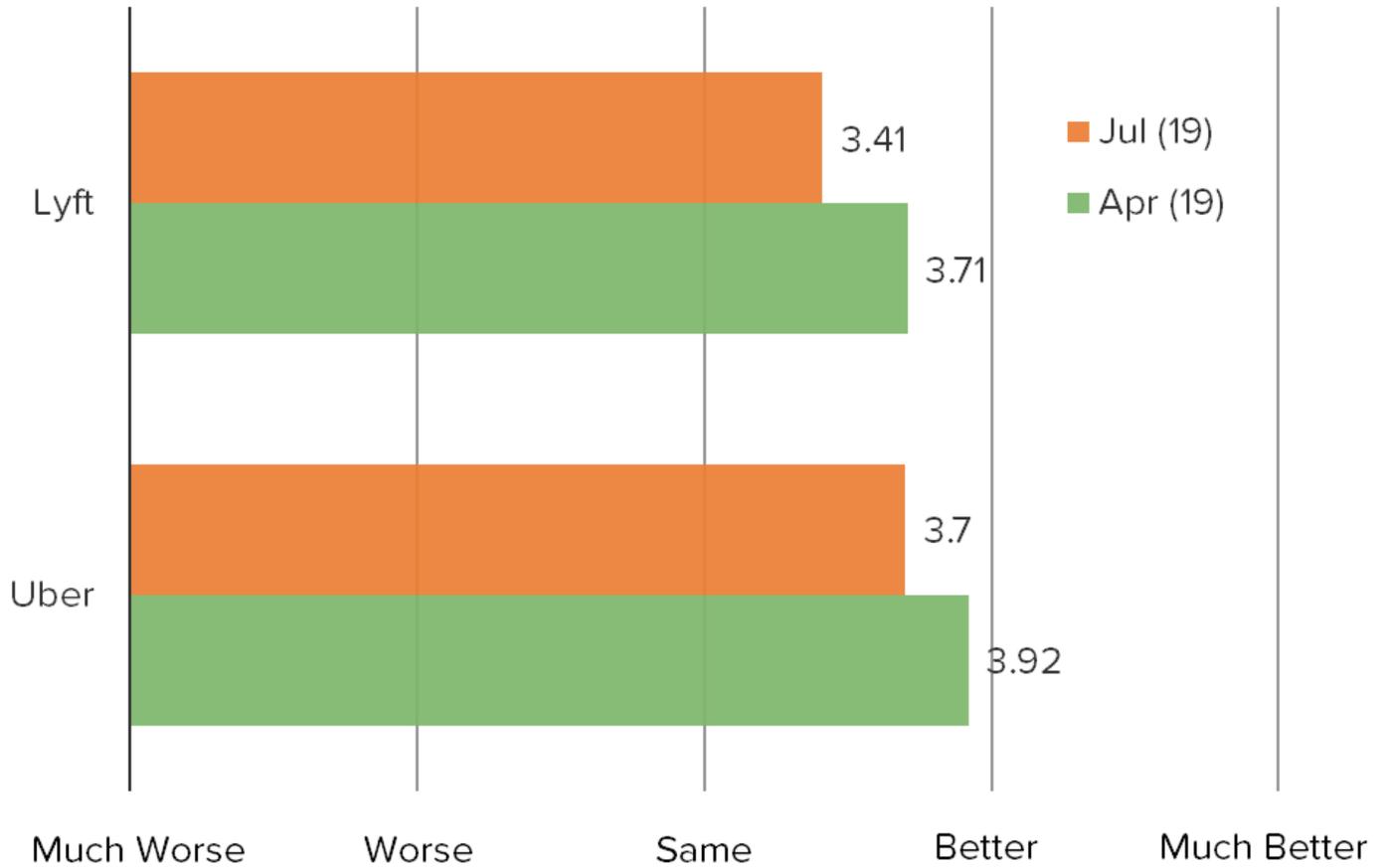


N = 200+ Uber and Lyft Drivers

Ride Sharing

COMPARED TO A YEAR AGO, HAS THE EXPERIENCE DRIVING FOR THIS COMPANY GOTTEN BETTER OR WORSE?

Posed to Uber and/or Lyft drivers.



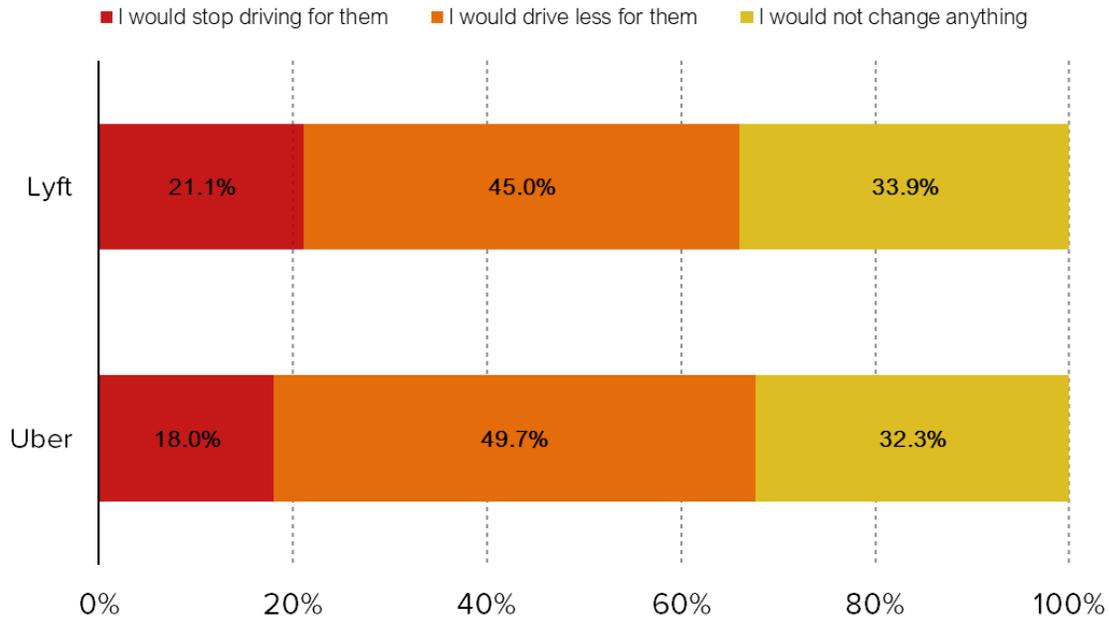
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Ride Sharing

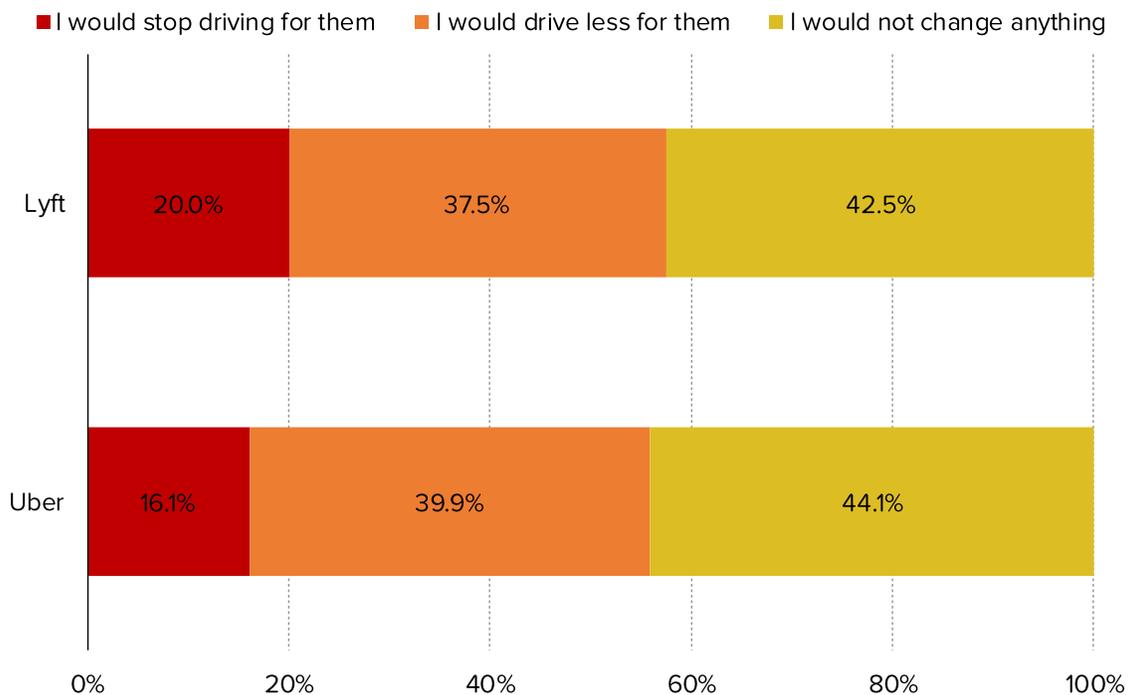
WHAT WOULD YOU DO IF THE FOLLOWING EITHER RAISED TAKE RATES OR REDUCED EXISTING DRIVER INCENTIVES?

Posed to Uber and/or Lyft drivers.

July 2019



April 2019

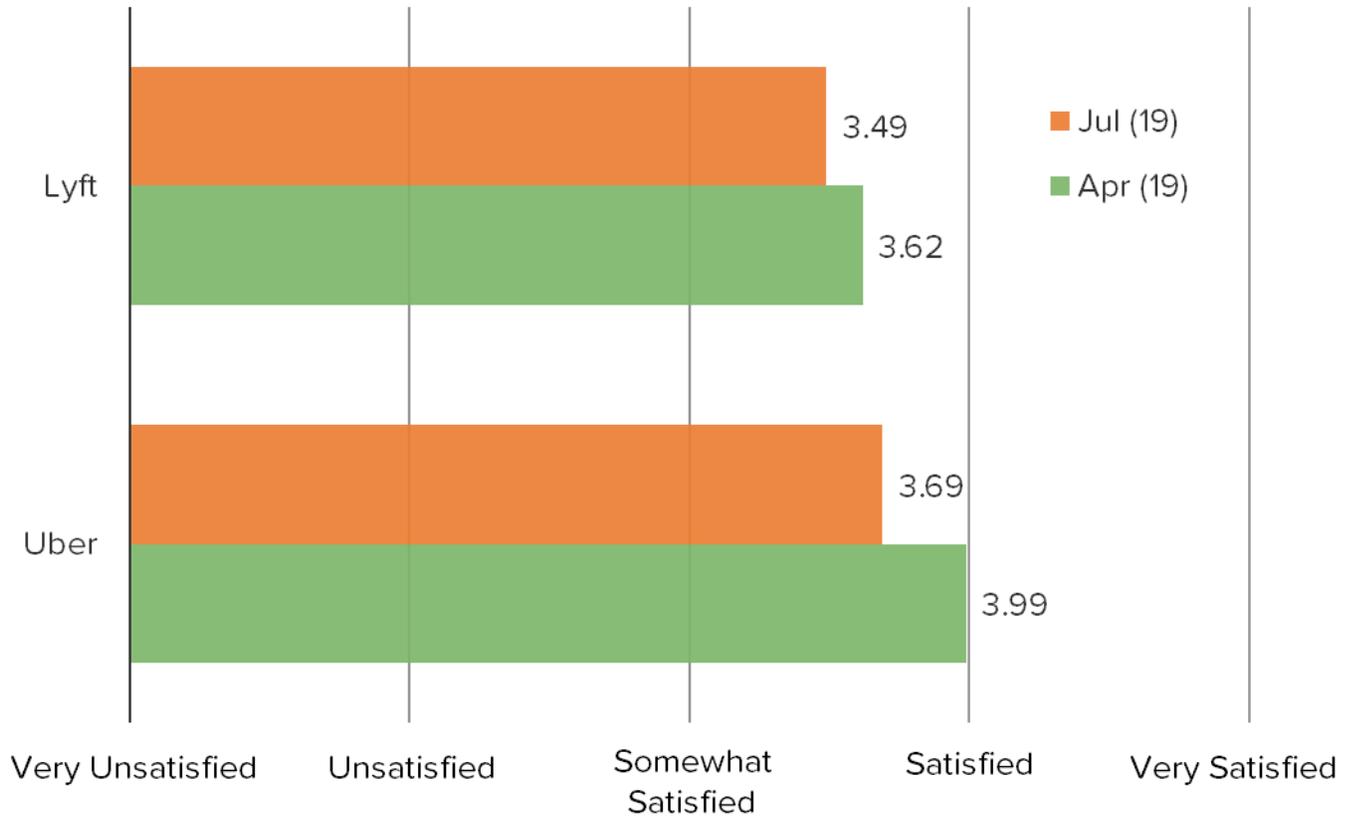


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Ride Sharing

IN ALL, HOW SATISFIED ARE YOU WITH THE FOLLOWING?

Posed to Uber and/or Lyft drivers.

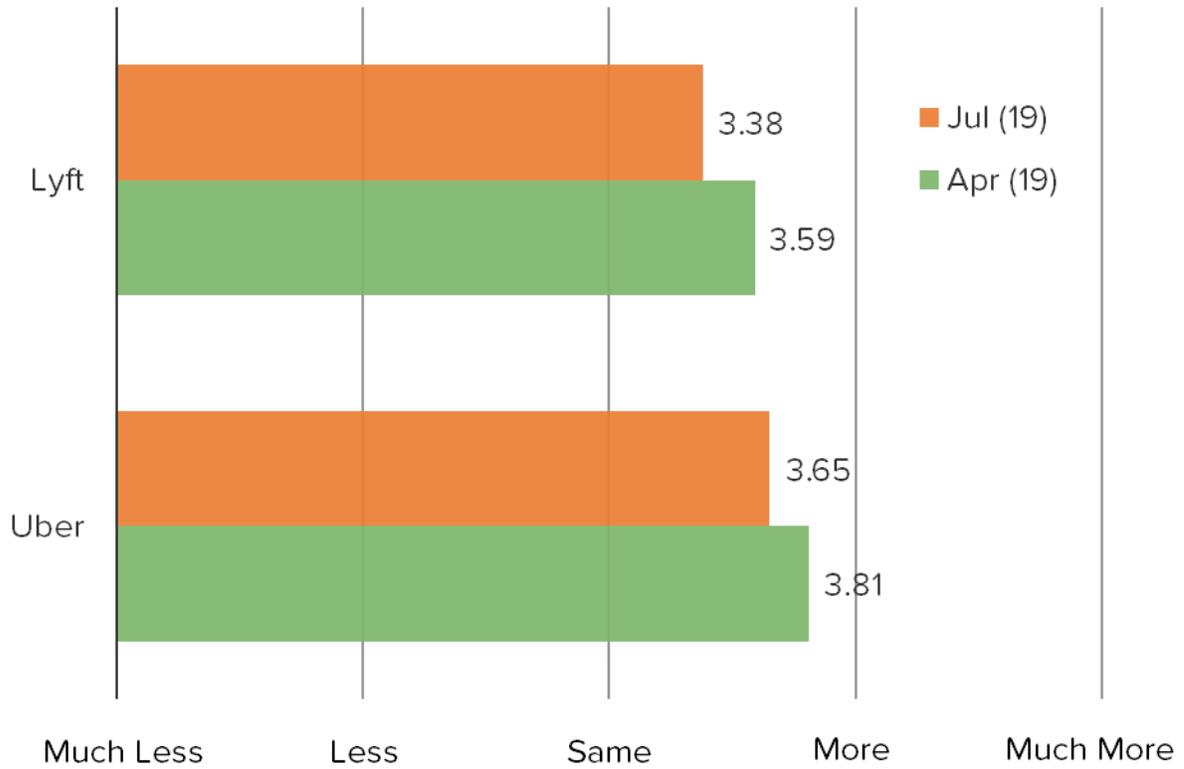


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Ride Sharing

COMPARED TO A YEAR AGO, WOULD YOU SAY YOU ARE NOW MAKING MORE OR LESS MONEY DRIVING FOR...

Posed to Uber and/or Lyft drivers.



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