



NEW YORK CITY: CAPITAL OF UBER NATION

A MEDIA ANALYSIS OF UBER
AND RIDESHARING IN FIVE U.S. CITIES



INTRODUCTION

Uber, a privately-held San Francisco-based ridesharing company currently valued at around \$50 billion, has spawned an entire industry and changed the way people commute in around 50 countries.

Ridesharing, led by Uber, is a disruptive force rapidly changing the transportation industry that has at times led to legal challenges and safety concerns. But Uber — and the wider ridesharing industry as a whole — also has a large and growing number of enthusiastic supporters and users.

This report analyzes the popularity and sentiment toward Uber and the wider ridesharing industry in five U.S. cities — **New York City, Washington DC, Chicago, San Francisco and Los Angeles** — in both online media coverage and social media mentions in early 2015. MediaMiser also conducted a contained, non-scientific web survey to gauge non-media sentiment of Uber and ridesharing.

SUMMARY OF FINDINGS

- New York City had the most positive Twitter mentions of all cities, and its Twitter account was mentioned the most often and most times per capita of all five cities.
- Local New York City media outlets also published the most articles mentioning Uber during the study period.
- Sentiment toward Uber was more positive on Twitter than in online news reports, but overall was relatively positive for both.
- Taxi industry friction and legal/regulatory issues were the top issues in online news. However, articles mentioning these issues were often positive depending on context.
- Two initiatives by Uber—UberEATS and Uber Spring Cleaning—were very noticeable in Twitter mentions and helped drive positive sentiment.
- The Washington Post was the top online news outlet to publish stories on Uber.
- The main positive and negative issues both in online news and on Twitter didn't fluctuate a great deal between cities, although there were some notable exceptions (see City by City Highlights, p9).
- MediaMiser's online survey showed that of respondents, 88% had used Uber at least once and 93% said convenience was their No. 1 reason for using the service.



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WANT A RIDE? SOME OF UBER'S OFFERINGS



UberX: The least expensive Uber service. Drivers use their own cars to give you a ride. Seats four riders.



UberXL: Seats at least six passengers. An UberXL car is an SUV or Minivan. Higher fare price than UberX.



UberPOOL: Share your ride with another person and split the cost. Available in LA, SF, NYC, and Paris.



UberPLUS/UberSelect: A luxury sedan that seats up to four riders. Expect a BMW, Mercedes, Audi or similar luxury car.



UberSUV: Similar to UberPLUS, luxury SUVs for all the style with a bit more room.



Uber Black: Luxury offering that competes with limo services. Drivers are licensed livery drivers and use a luxury sedan. Higher fare price than UberPLUS.



UberLUX: The most luxurious Uber offering, get picked up in a luxury vehicle such as the Tesla Model S, Mercedes Benz S-Class or BMW 7-Series.

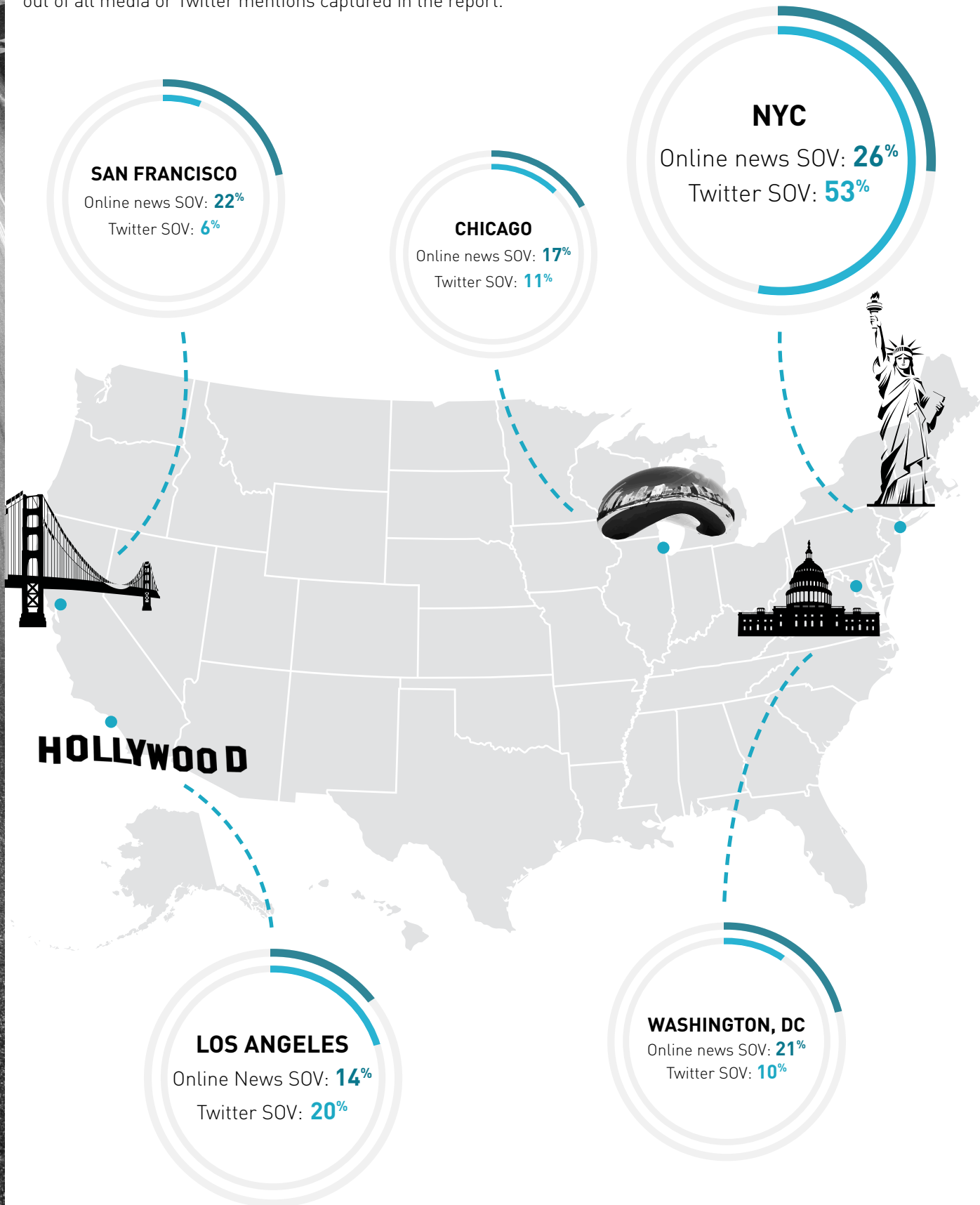


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ONLINE NEWS AND TWITTER: SHARE OF VOICE BY CITY

Share of voice is the city's percentage of media or Twitter mentions out of all media or Twitter mentions captured in the report.

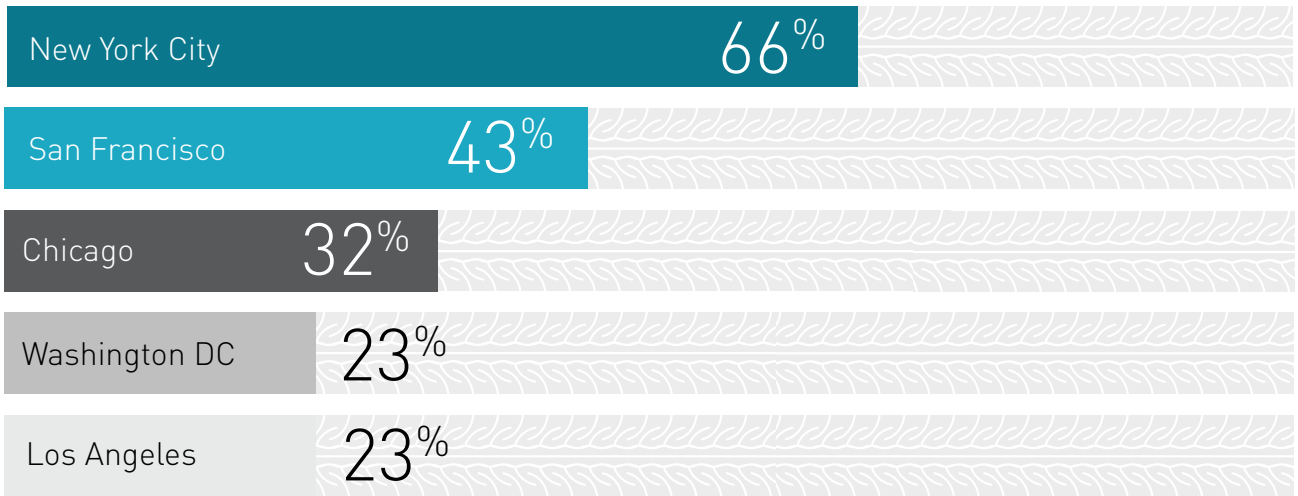


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WHAT WE FOUND

NYC IS UBER STOKED POSITIVE MENTIONS BY REGION - TWITTER



By far the most prevalent finding was that New York City is, at least among the five cities included in this study, the hotbed of Uber in the U.S.

Not only did the New York City metro area have **the most positive Twitter sentiment of all five cities** by a large margin, its local Uber Twitter account was mentioned the most often and **most times per capita** of all five cities. New York-based media outlets also published the most articles mentioning Uber during the study period, and had the second-highest positive sentiment of all online news regions studied.

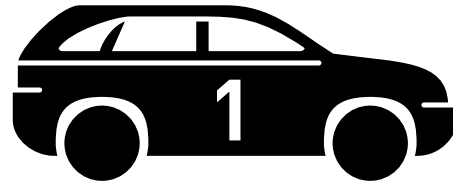


New York's Twitter sentiment was very positive during the study period, mostly thanks to:

- Positive customer service tweets
- Retweeted celebrity tweets commenting on good customer service
- Retweeted positive news headlines about Uber
- The launch of UberEATS
- Uber Spring Cleaning (see description on page 6)
- Uber's #4yearsmovingNYC

UBER TWITTER MENTIONS PER CAPITA (GREATER METRO AREAS)

NEW YORK



Uber mention for every

2,125
people

LOS ANGELES



Uber mention for every

5,134
people



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OVERALL SENTIMENT

Overall sentiment toward Uber and the ridesharing industry was positive both in online news reports and on Twitter. This could be considered a bit surprising, considering the cloud of negative press the company — and ridesharing in general — received in parts of 2014, especially in terms of battles with the taxi industry and issues with regulators.

As the charts show, online news was more tempered in its enthusiasm with 11 per cent more negative mentions (the majority of articles were hard news and not opinion pieces).

OVERALL SENTIMENT TOWARD UBER/RIDESHARING

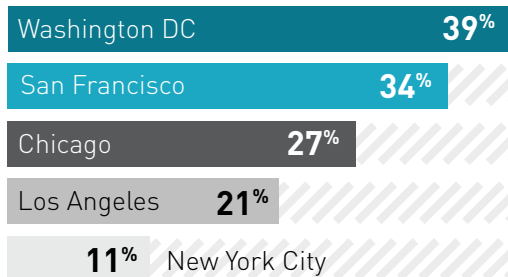


Online media



Twitter

NEGATIVE TWITTER MENTIONS BY CITY

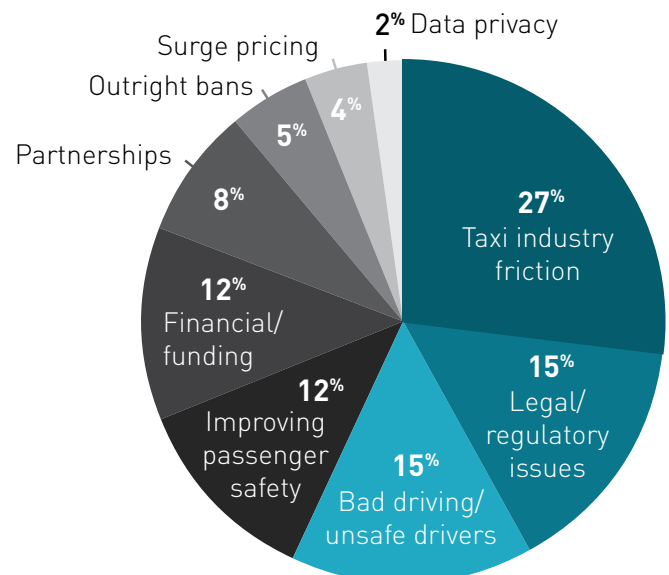


Washington, DC had the highest level of negative tweets toward Uber, mostly thanks to service-related complaints from users.

ONLINE NEWS: THE ISSUES/EVENTS

The top issues in online news for Uber and the greater ridesharing industry were noticeably different than those often mentioned on Twitter, though there was some crossover between the two. The majority of issues covered in online news — which were dominated by **taxi-related issues, legal/regulatory issues, and mentions of bad driving or unsafe drivers** — were also a mixed bag of positive, neutral and negative coverage, depending on context.

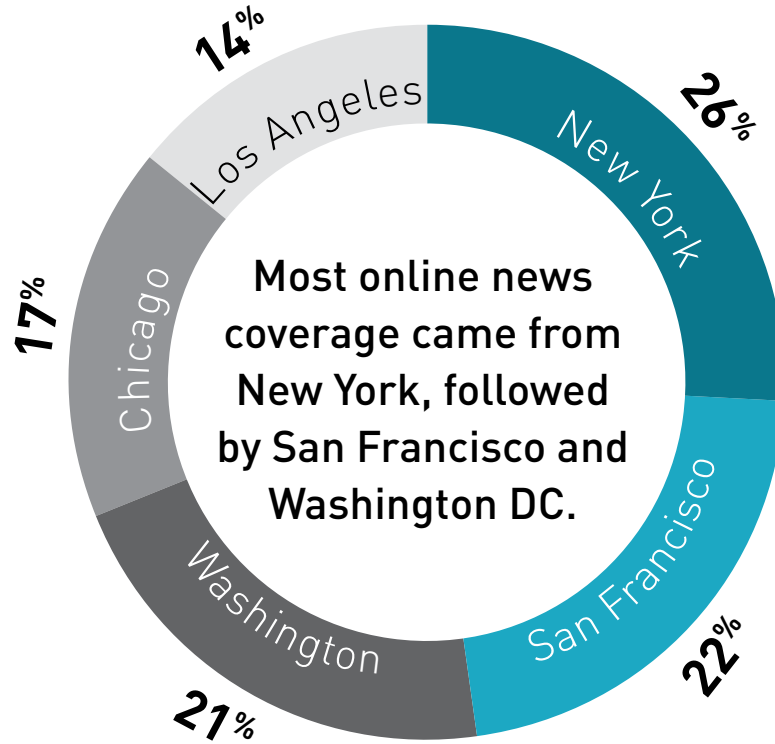
OVERALL TOP ISSUES IN ONLINE NEWS



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ONLINE NEWS SHARE OF VOICE



UBER EATS, UBER SPRING CLEANING

Two initiatives in particular launched by Uber at the tail end of the period — **UberEATS** and **Uber Spring Cleaning** — were prominent in terms of both mentions and the amount of positive comments they elicited from clients (though there was some negative commentary attached to each, as well, if users felt they had been kept waiting too long by drivers or customer service staff).

UberEATS involved partnerships with restaurants to deliver food to clients, while Uber Spring Cleaning partnered with Goodwill International to pick up people's unwanted and used items.

Uber Spring Cleaning comprised 33 per cent of all Twitter mentions in Chicago following its April 30 launch, and nearly all of them were positive except in the cases of service-related incidents.



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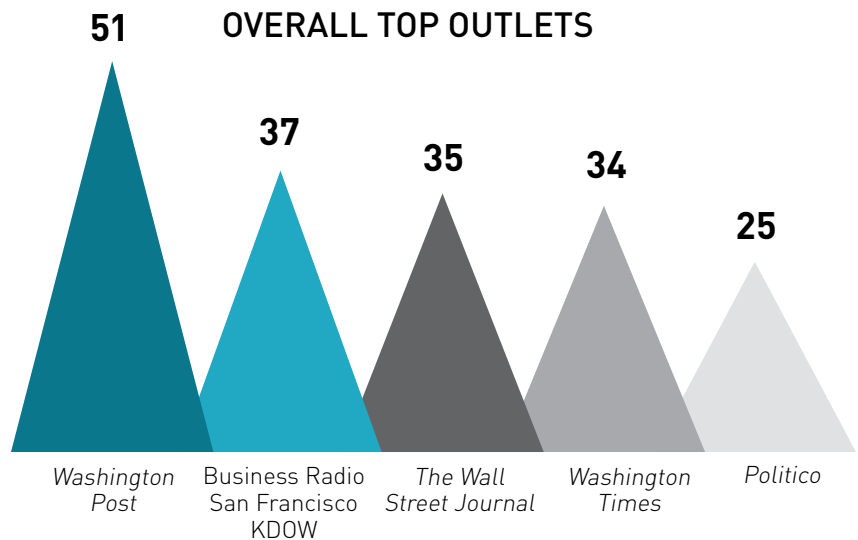
THE COMPETITION

Lyft (also based in San Francisco, and which received a round of venture funding during the study period) was mentioned in only one per cent of tweets during the period, but was mentioned in 47 per cent of online news stories.

Secondary competitor **Sidecar**, another San Francisco-based startup, was mentioned in eight per cent of online news stories but less than one per cent of tweets.

GETTING POLITICAL

Much of the online news coverage surrounding Uber dealt with issues of a regulatory or legislative nature, and this is illustrated in the top outlets: Washington-based media outlets, including the **Washington Post** and **Politico**, were three of the five top outlets to cover Uber in each of the five cities.



AT ODDS?

Some US cities/states that have recently allowed Uber/ridesharing services:

- Portland, Oregon
- Washington DC
- Los Angeles (airport ban recently lifted)
- Oklahoma City
- New Orleans
- Maryland
- Wisconsin

Some countries or cities that have banned Uber/ridesharing services:

- Kansas City
- Geneva, Switzerland
- Sao Paulo, Brazil
- Germany
- South Korea
- Thailand
- India
- France
- Spain
- Portugal
- Belgium



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CITY-BY-CITY HIGHLIGHTS

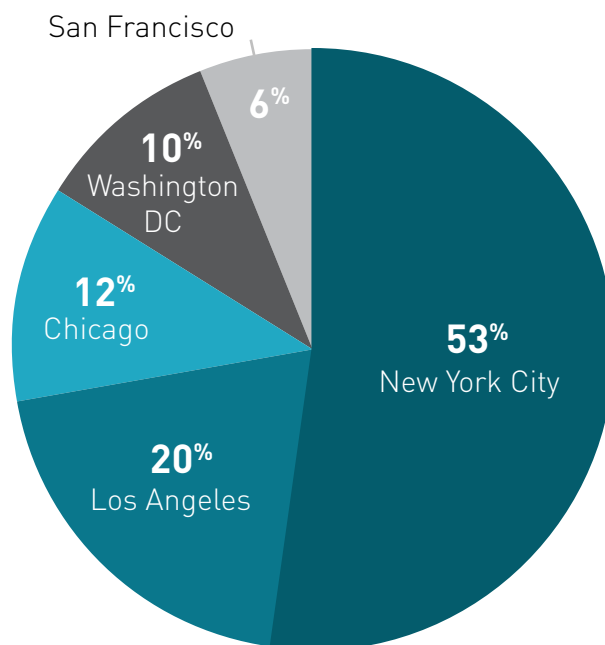
The main positive and negative issues — both in online news, and on Twitter — didn't fluctuate greatly from city to city.

There were, however, some noteworthy exceptions:

ONLINE NEWS

- Around **25 per cent** of Chicago, San Francisco and Washington DC's online news stories mentioned safety issues or improving rider safety, while only **16 per cent** of LA-based news stories and **14 per cent** of New York City-based stories mentioned these same issues.
- A whopping **53 per cent** of Washington DC-based online news stories mentioned legal/legislative or regulatory issues, while only **16 per cent** of Chicago's coverage and **13 per cent** of LA's coverage did the same.
- While only one per cent of Los Angeles and four per cent of Chicago stories mentioned surge pricing (higher prices during peak hours) as an issue, **10 per cent** of stories from San Francisco and nine per cent of New York media stories discussed the topic.

TWITTER SHARE OF VOICE - BY CITY



TWITTER

The nature of positive and negative mentions of Uber on Twitter were also very similar from city to city, but again with some exceptions:

THE GOOD

As discussed, New York City saw a large influx of positive sentiment during the study period. Much of it was city-specific, and much of it was driven by celebrities tweeting approval of their Uber experience, such as Sydney Sierota (lead singer of Echosmith).

NYC's Uber account also saw hundreds of retweets of positive tweets about great customer service, along with pride in Uber's presence in the city over the past four years with hundreds of tweets referencing the #4YearsMovingNYC hashtag.



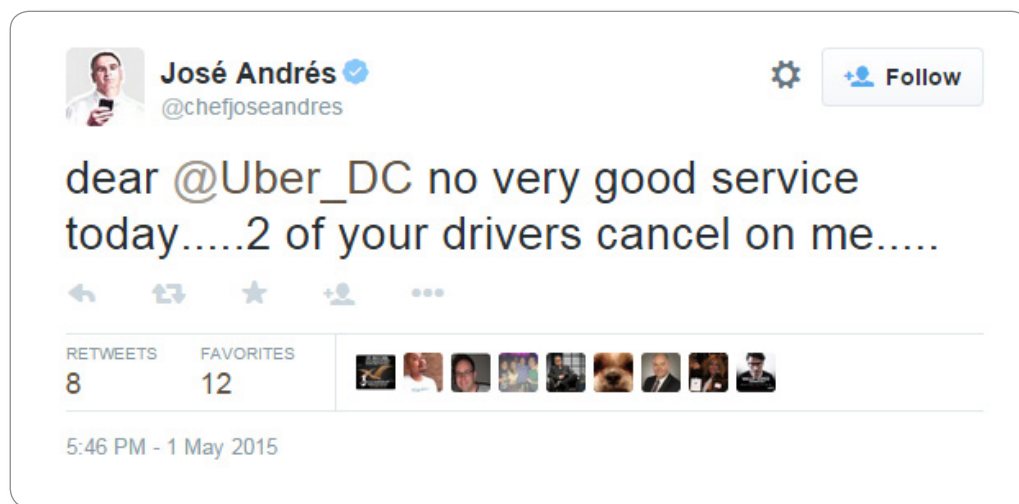
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THE BAD

Among negative chatter in all cities examined there were issues with fare surges, complaints about drivers being unsafe/rude/not showing up, slow customer service response times and — somewhat ironically, considering that it was overall a good-news campaign — slow customer service experienced during the #uberspringcleaning donation/giving campaign.

Interestingly, Uber's Washington DC Twitter account received more negative mentions than any other of the five handles analyzed. Most of its negative mentions centred around service, including one retweeted negative tweet by chef Jose Andres (@chefjoseandres) about drivers canceling on him twice in one day.



TOP POSITIVE TWITTER ISSUES:

- #uberspringcleaning
- #ubereats
- Service-related positive comments
- Retweeting positive news headlines
- Positive celebrity retweets

TOP NEGATIVE TWITTER ISSUES:

- Driver complaints (rude, didn't show up, bad driver, aggressive, etc.)
- Slow customer service response times
- Surge fare pricing



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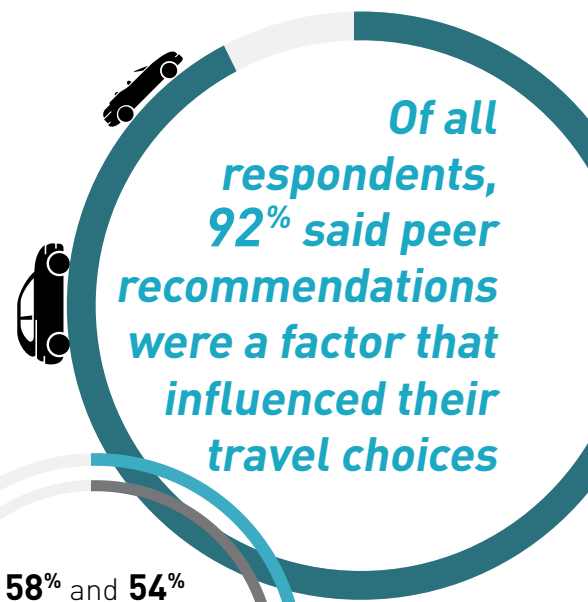
SURVEY SAYS?

MediaMiser also conducted a contained, non-scientific web survey on Uber and ridesharing to gauge non-media sentiment among both users and non-users alike, in which respondents weighed in on their perceptions of Uber and the greater ridesharing industry.

Respondents were located in the same cities used in the online news and Twitter analysis. Respondents did not necessarily have to be a past Uber customer.

Highlights of our findings, which — as in the case of Twitter and online news — were positive overall in nature toward Uber and ridesharing, are below. MediaMiser's survey did not poll enough respondents to be considered a representative sample.

GENERAL HIGHLIGHTS



Of the 12 per cent who hadn't, **67%** had heard of Uber while **33%** of those respondents indicated they weren't familiar with the company or its offerings.



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POSITIVE

(All positive and negative points were derived from responses from those who had used Uber at least once)

- Of respondents, 93 per cent said that convenience was their No. 1 reason for using the service.
- 76 per cent indicated they felt either safe or very safe when travelling via Uber. Only four per cent said they felt unsafe or very unsafe.
- Similarly, 74 per cent of respondents said that giving credit card information to Uber was either secure or very secure.
- As far as overall ride experience, satisfaction among riders was highest regarding payment procedures and vehicle cleanliness.
- Of all users surveyed, 54 per cent indicated they were very satisfied with Uber's services. Around 46 per cent indicated they were satisfied to somewhat satisfied, and no respondents said they were unsatisfied.
- 52 per cent said that if Uber were to shut down in their city it would impact them deeply.



Some of the least satisfactory aspects of users' ride experiences were **fare prices and location awareness.**

NEGATIVE

- Some of the least satisfactory aspects of users' ride experiences were fare prices and location awareness.
- The most common negative aspects respondents said they had read online were that it was too expensive and that it was an illegal parallel industry to the taxi industry.



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METHODOLOGY

Online news articles from a select library of major news outlets in the five U.S. cities were collected between mid-January and late April, 2015.

Twitter data was collected from mid-January to early May using Uber's local Twitter accounts in each city (@Uber_NYC, @Uber_DC, @Uber_CHI, @Uber_SF and @Uber_LA).

A non-scientific online survey was also conducted a survey to record people's experiences and perceptions of Uber was created and deployed on FluidSurveys, with a convenience sampling strategy.

Online media content was toned from the perspective of Uber and the wider ridesharing industry using human toners, on a three-point scale. Social media content was toned using MediaMiser's automated sentiment engine, with manual training of the algorithm done by human toners.

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