MAGNA MEDIA TRIALS x Uber

Inside a Rideshare

The Tablet Ads Opportunity

The rideshare tablet market is expected to grow in the next 10 years ...

139% Growth

2023-2032 (forecasted)

$1.3B
2032 E

$554M
2023

Market research future, Automotive Rear Seat Infotainment Market, 2018 - 2032 (USD Million) , 2022.
Source: https://www.marketresearchfuture.com/reports/automotive-rear-seat-infotainment-market-8727

MAGNA MEDIA TRIALS Uber

Our Goal

Understand how advertisers can leverage tablet ads in a rideshare to its truest potential

Our Method

Participants

Uber riders recruited from a nationally representative online panel

n=1,029

Qualifiers

Must have taken a ride with Uber in the past 2 weeks and rode in key DMAs*

Ages 18+

Ride Diary

Online diary of most recent ride with Uber, including purpose of trip, origin, destination, time of day, mindset, etc.

Ad Feedback

Deep dive into riders' perceptions and openness to ads or messages from advertisers during their ride

*Key DMAs include Los Angeles, San Francisco, Las Vegas, Miami, Philadelphia, Washington D.C., Boston

MAGNA MEDIA TRIALS Uber

Table of Content

1

Ads in a rideshare – yay or nay
Riders Opinions of seeing ads in a rideshare

2

The context halo
The influence of the trip itself

3

The format deep dive
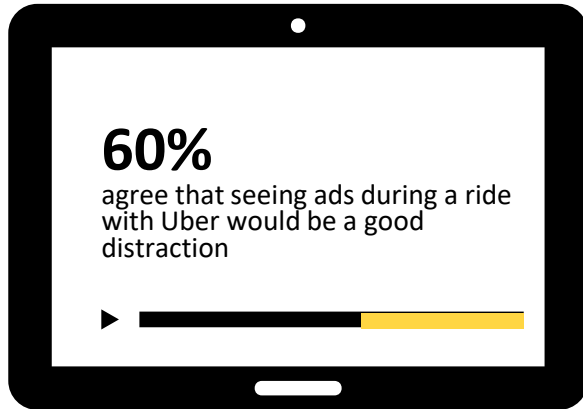*What advertisers need to know about tablet ads*

MAGNA MEDIA TRIALS Uber

Ads in a rideshare – yay or nay?

Riders' opinion of seeing ads in a rideshare

MAGNA MEDIA TRIALS   Uber

Ads during rideshare are seen as a good distraction

Sentiment toward ads during a ride with Uber % Strongly agree or agree

60%
agree that seeing ads during a ride with Uber would be a good distraction

Reasons why riders would be open to seeing ads on the Uber app
Open ended responses

*"I feel like it would be an **easy distraction**, but in a good way"*

*"I would **love the distraction**"*

*"It would be a **pleasant distraction**"*

*"It would be a **helpful distraction**"*

*"Because it would be a **nice distraction**"*

*"It could be a **useful distraction** when you are stuck in traffic or waiting for a traffic light"*

*"It would be a **welcome distraction** and possibly something I could take advantage of"*

MAGNA MEDIA TRIALS Uber

69% of riders see ads as an enhancement to their ride

Note that the net score of "be entertaining" and "make their ride enjoyable" is 69%

Sentiment toward seeing ads during a ride with Uber
% Strongly agree or agree

Seeing ads during their journey would...

66%
Be entertaining

54%
Make their ride more enjoyable
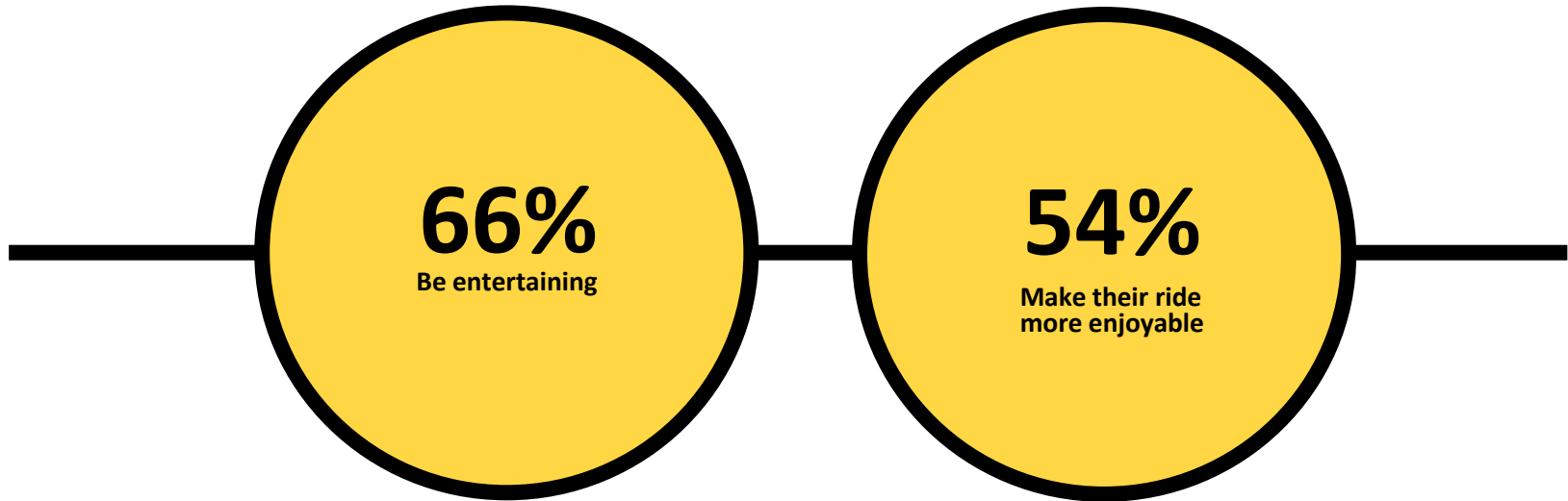
Overall sample, n = 1,029
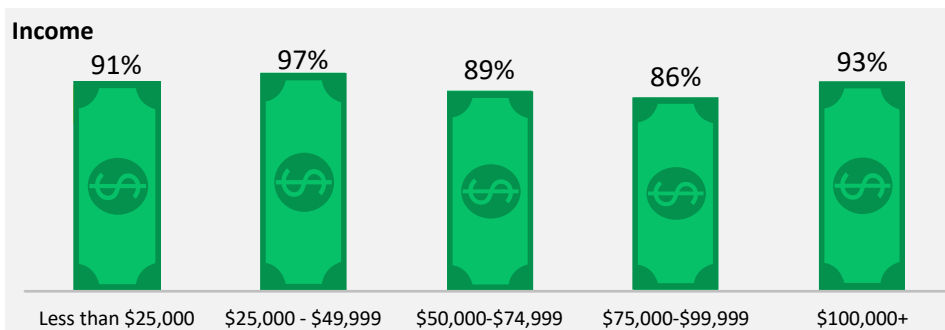Q: When thinking about seeing ads during a ride with Uber, how much do you agree or disagree with the following statements?

MAGNA MEDIA TRIALS Uber

Ads in a rideshare resonate with all riders; especially those traveling for leisure

Note: Green shades in the heatmap represent varying degrees of intensity or values, with darker shades indicating higher values and lighter shades indicating lower values.

Ad sentiment by purpose of most recent trip
% Strongly agree or agree

Those traveling for…

	Leisure/recreational purposes	Personal tasks/errands	Work-related tasks
The ads caught my attention	**86%**	80%	74%
The ads were a good distraction	**86%**	77%	77%
The ads were enjoyable	**80%**	71%	76%
The ads were more interesting than what I'm used to seeing from brands	**80%**	70%	70%

MAGNA MEDIA TRIALS Uber

Receptivity to ads in a rideshare is universal

Marketers have a unique opportunity to reach all kinds of people while open to brand messaging

**Openness to ads during their ride with Uber -** % Very or somewhat open

Overall

91%
of Uber riders were open to seeing ads during their ride

Generation

Gen z — 92%

Millennial — 95%

Gen X — 96%

Gender

93%   89%

Income

Less than $25,000	$25,000 - $49,999	$50,000-$74,999	$75,000-$99,999	$100,000+
91%	97%	89%	86%	93%

MAGNA MEDIA TRIALS   Uber
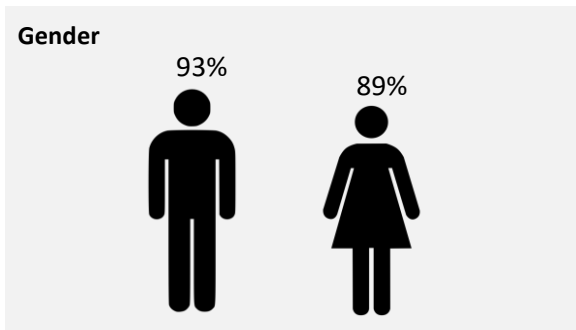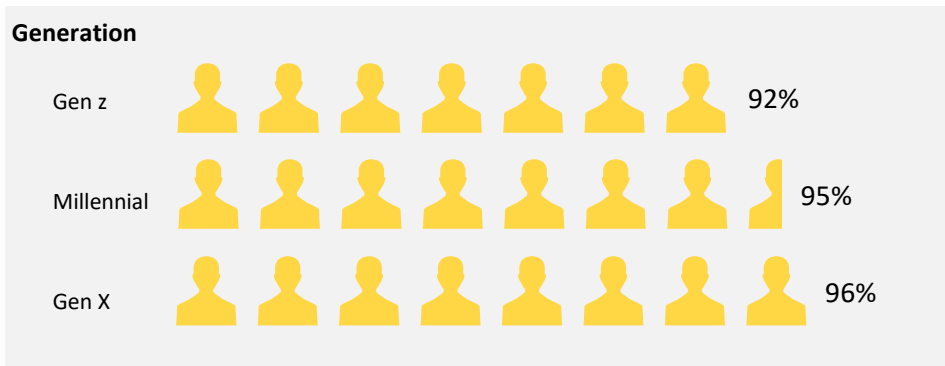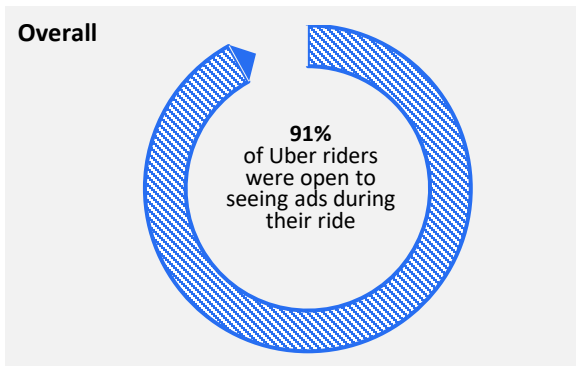
The context halo

The influence of the trip itself

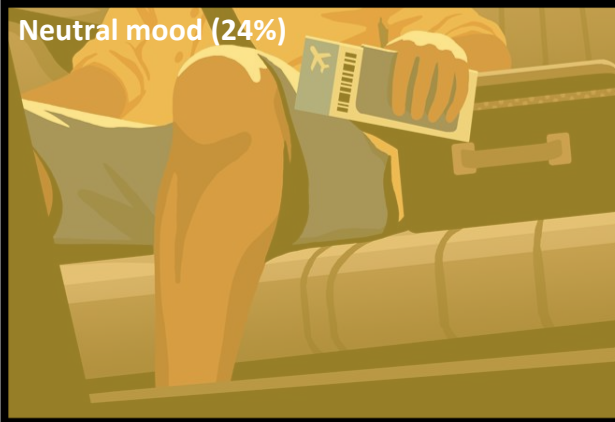MAGNA MEDIA TRIALS   Uber

Most riders are in a positive mood during their ride

Mood of riders at the beginning of their ride
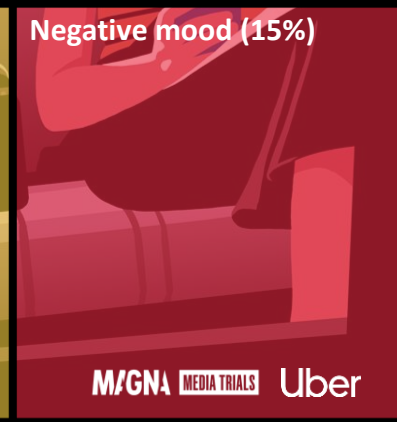% Selected
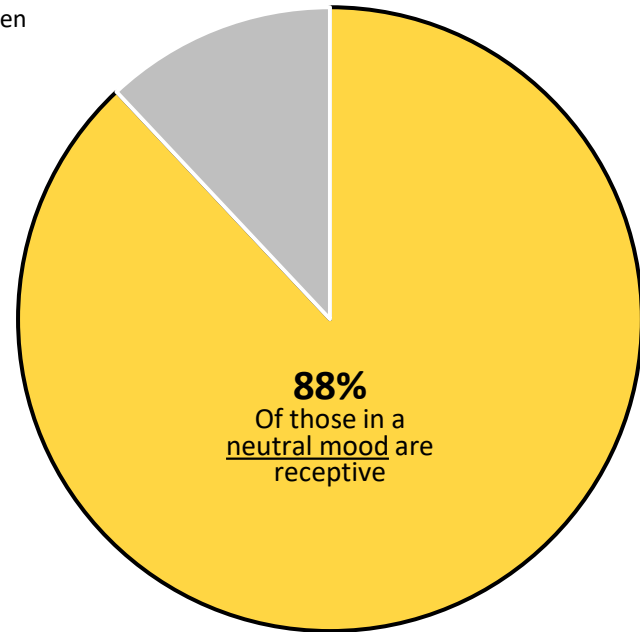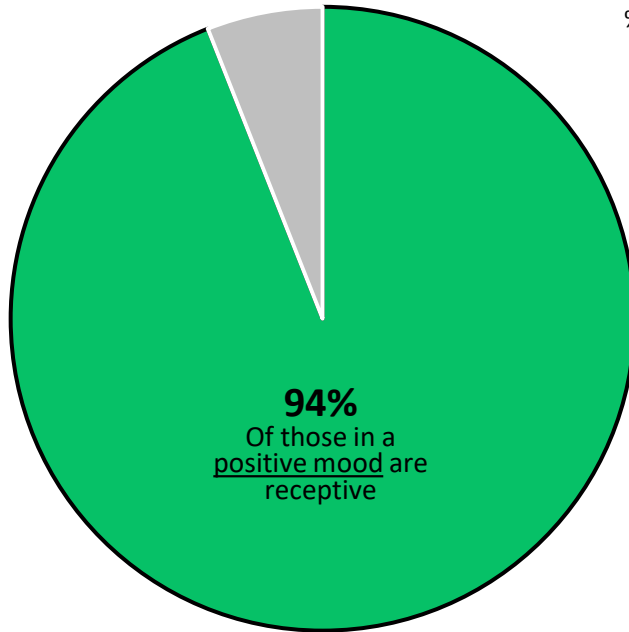

Positive mood (61%)
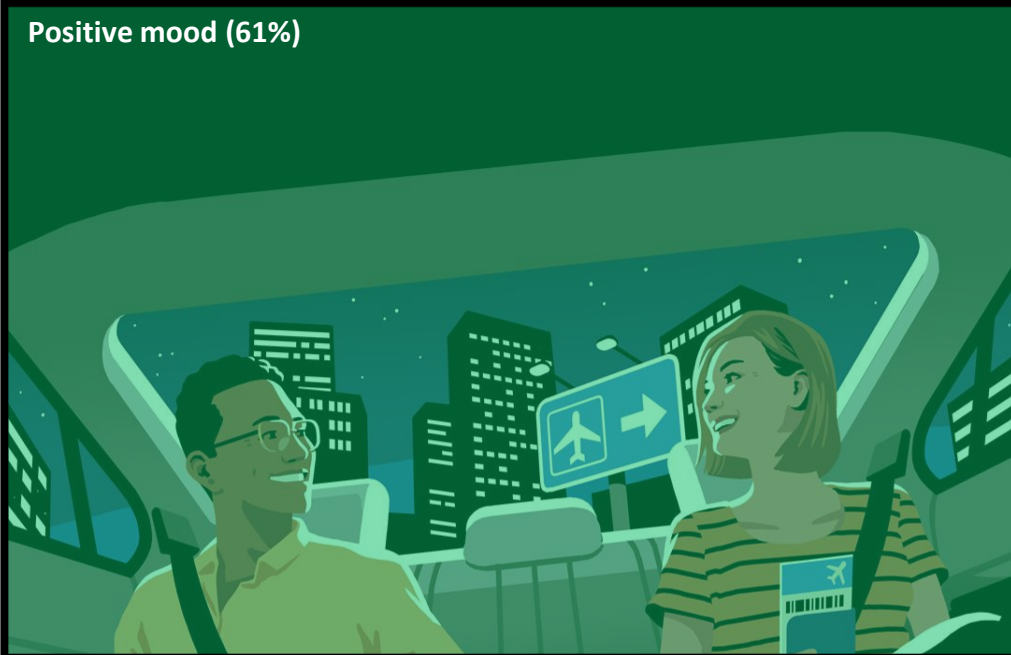
Neutral mood (24%)

Negative mood (15%)

Regardless of mood, riders in a rideshare are open to ads

Ad receptivity by mood
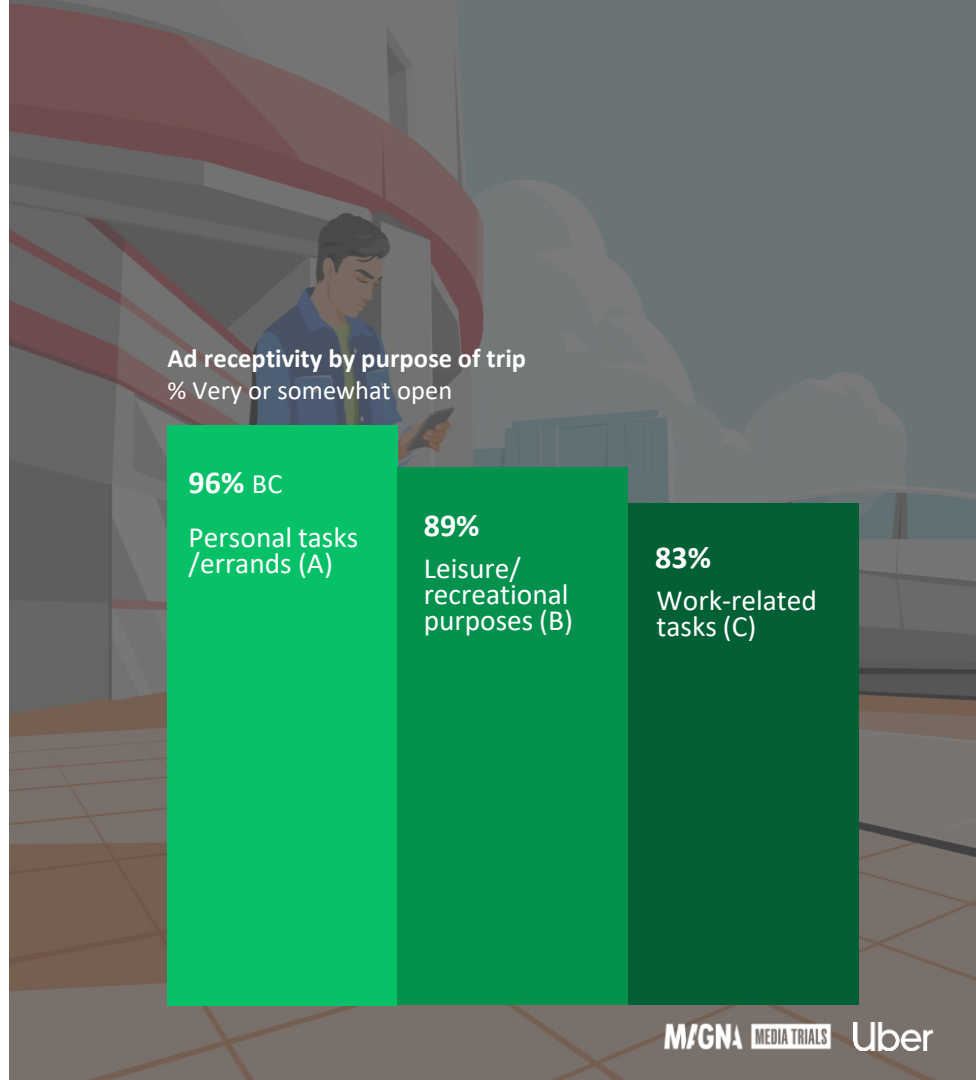% Very or somewhat open

94%
Of those in a
<u>positive mood</u> are
receptive

88%
Of those in a
<u>neutral mood</u> are
receptive

Those who were exposed to a tablet during their recent ride, n=443
Q: In general, how open were you to seeing ad(s) during your most recent ride with Uber?
Q: How were you feeling at the beginning of your ride?
Positive mood: relaxed, happy, excited, curious; Neutral mood: neutral, preoccupied
Note: sample for negative mood by ad receptivity is <50

MAGNA MEDIA TRIALS Uber

Riders traveling for personal tasks/errands are the most receptive to ads

Serve ads to riders during personal tasks/errands to offer solutions or relevant offers that align with their immediate needs and interests

Ad receptivity by purpose of trip
% Very or somewhat open

96% BC
Personal tasks /errands (A)

89%
Leisure/ recreational purposes (B)

83%
Work-related tasks (C)

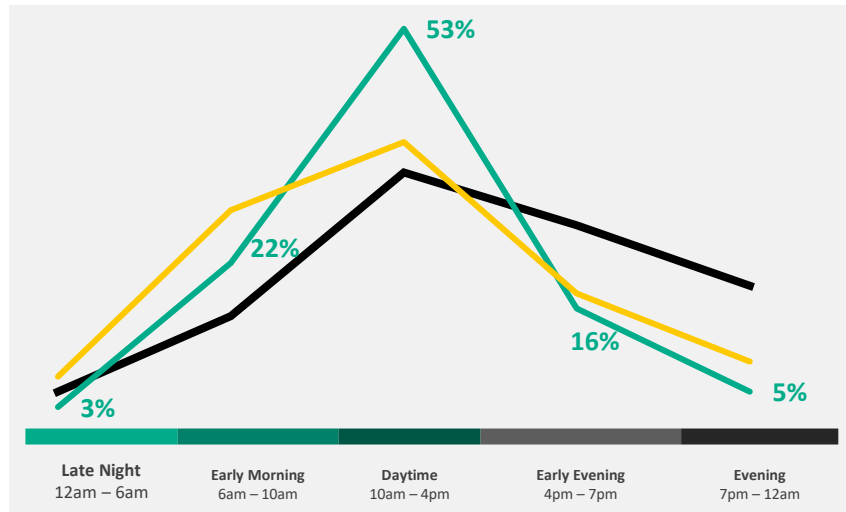# People consistently rode for errands or work during the day, with more leisure travel in the evening

Consider allocating additional impressions to daytime to reach people who are riding for personal tasks or work
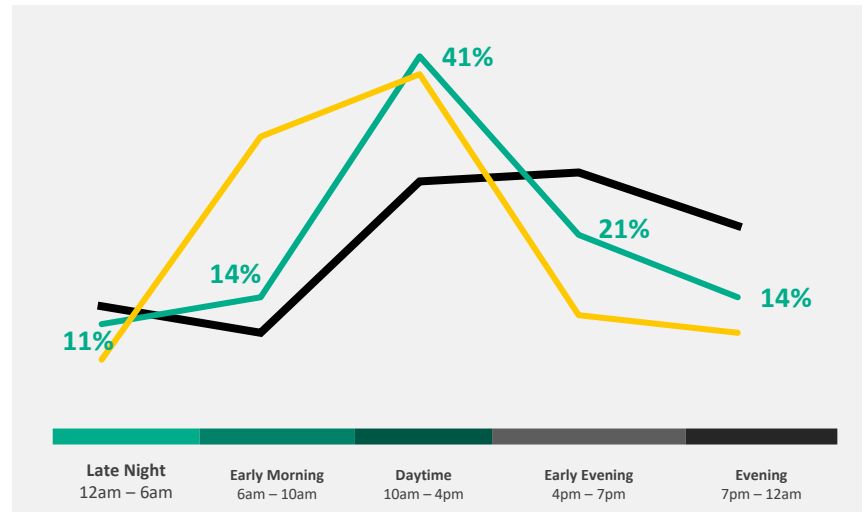
Purpose of most recent trip by time of day
% Selected

Legend:
- Personal tasks/errands (green)
- Work-related tasks (yellow)
- Leisure/recreational purposes (black)

Weekday

- 53%
- 22%
- 16%
- 3%
- 5%

Late Night 12am – 6am | Early Morning 6am – 10am | Daytime 10am – 4pm | Early Evening 4pm – 7pm | Evening 7pm – 12am

Weekend

- 41%
- 14%
- 21%
- 11%
- 14%

Late Night 12am – 6am | Early Morning 6am – 10am | Daytime 10am – 4pm | Early Evening 4pm – 7pm | Evening 7pm – 12am

Weekday riders' sample, n = 600; Weekend riders' sample, n = 401
Q: Around what time did you travel with Uber?
Q: What was the purpose for your trip?
Note: this finding was based on participants in the study

MAGNA MEDIA TRIALS Uber

Riders are equally receptive to getting ads on weekdays and weekends

Marketers have the freedom to pick the perfect day to connect with their audience
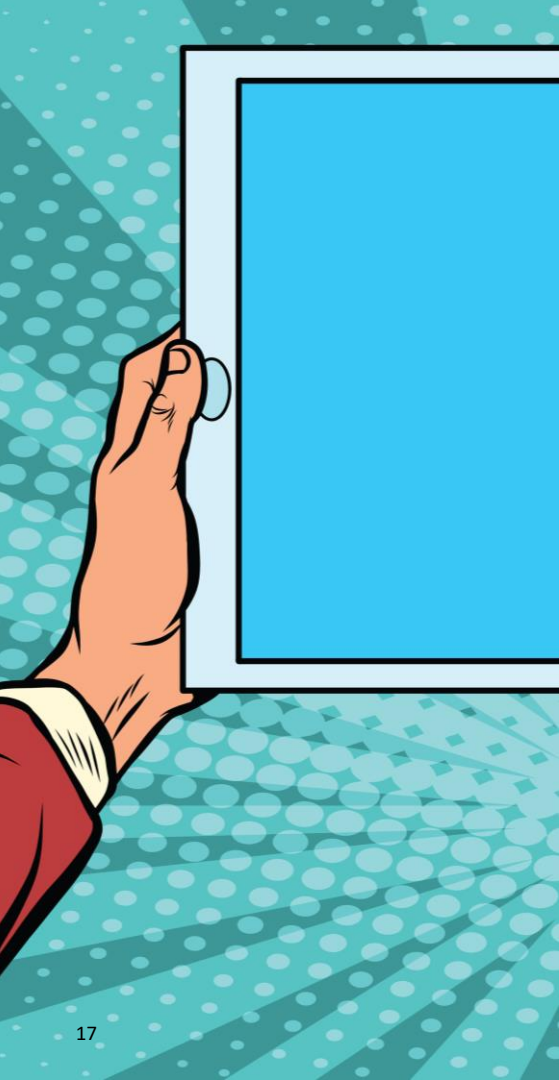
Ad receptivity by weekday & weekend
% Very or somewhat open

92%
were open to seeing ads on a **weekday**

92%
were open to seeing ads on a **weekend**
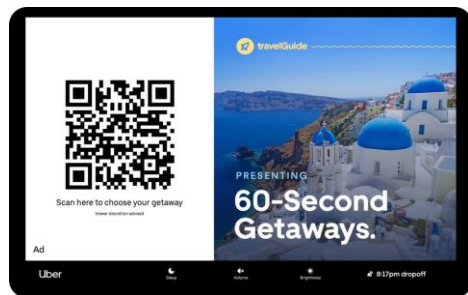
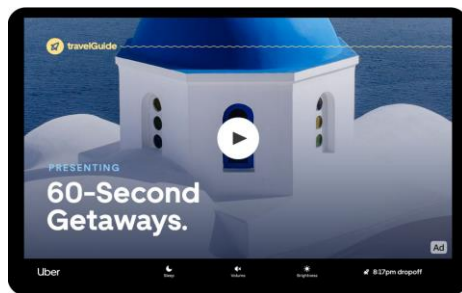MAGNA MEDIA TRIALS Uber

The format deep dive

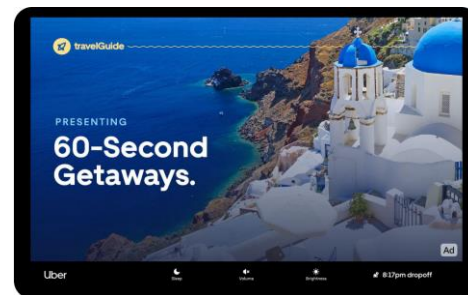**What advertisers need to know about tablet ads**

What are tablet ads?

Tablet ads are advertisements shown on tablets inside rideshare vehicles, allowing marketers to reach passengers with content during their rides
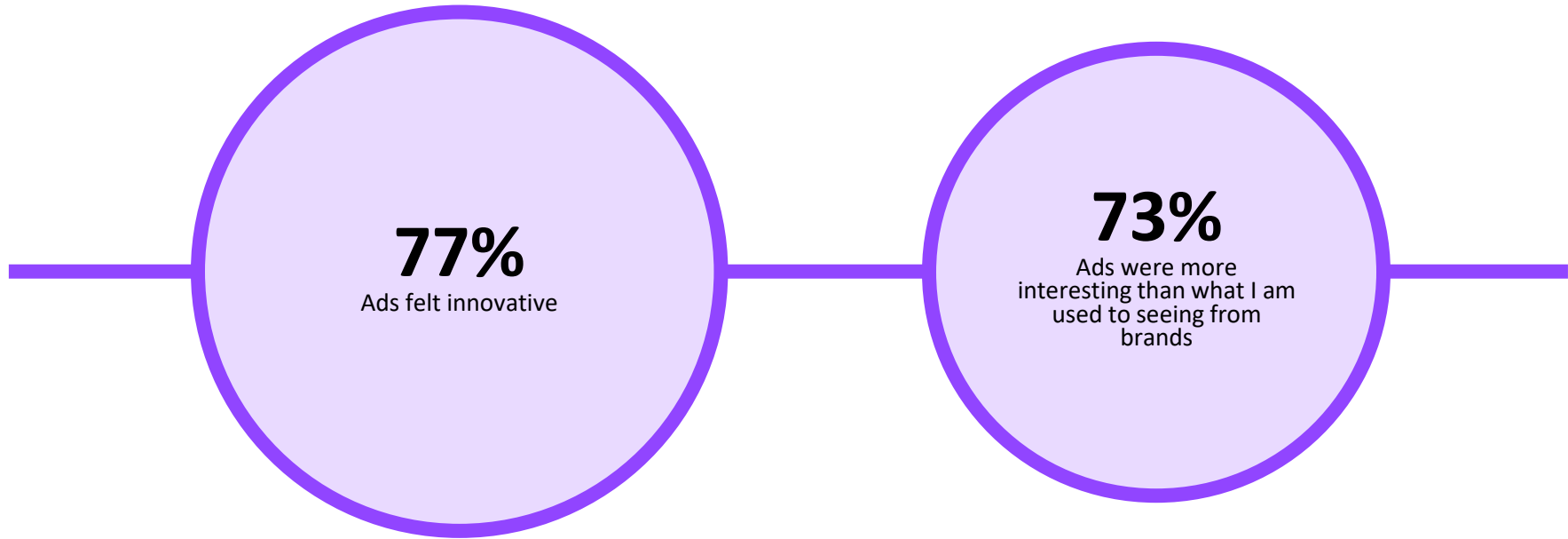

Interactive ad

Video ad

Display ad

MAGNA MEDIA TRIALS Uber

Riders recognize the uniqueness of ads on the go

Ad sentiment
% Strongly agree or agree

77%
Ads felt innovative

73%
Ads were more interesting than what I am used to seeing from brands

Those who were exposed to ads on a tablet during their ride: n=230
Q: Overall, how much do you agree or disagree with the following statements about the ad(s) you saw during your ride with Uber?
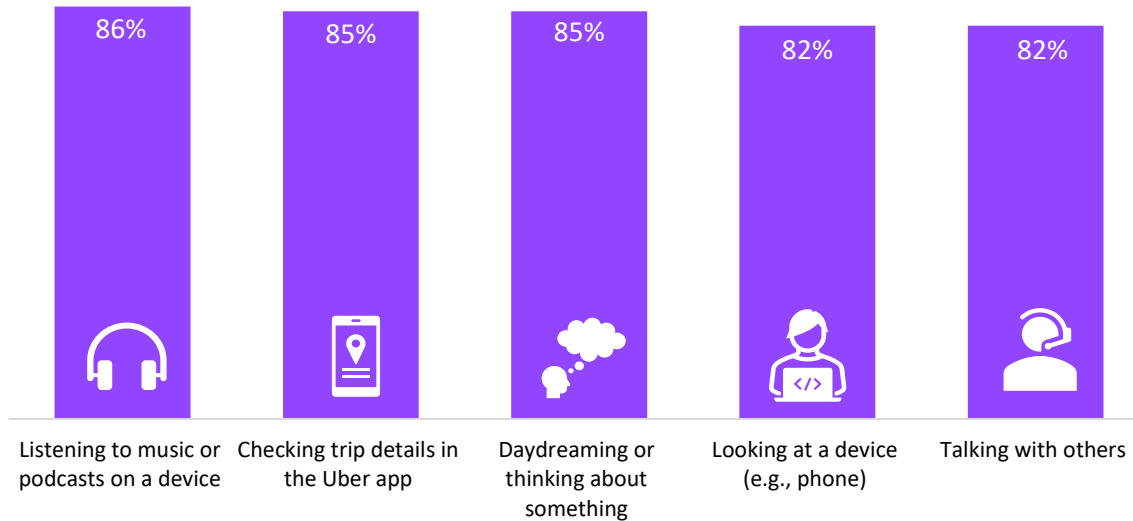
MAGNA MEDIA TRIALS Uber

Tablet ads cut through the noise of everyday life

Marketers can expect to get people's attention, even if they are multitasking

Ads caught their attention
% Strongly agree or agree

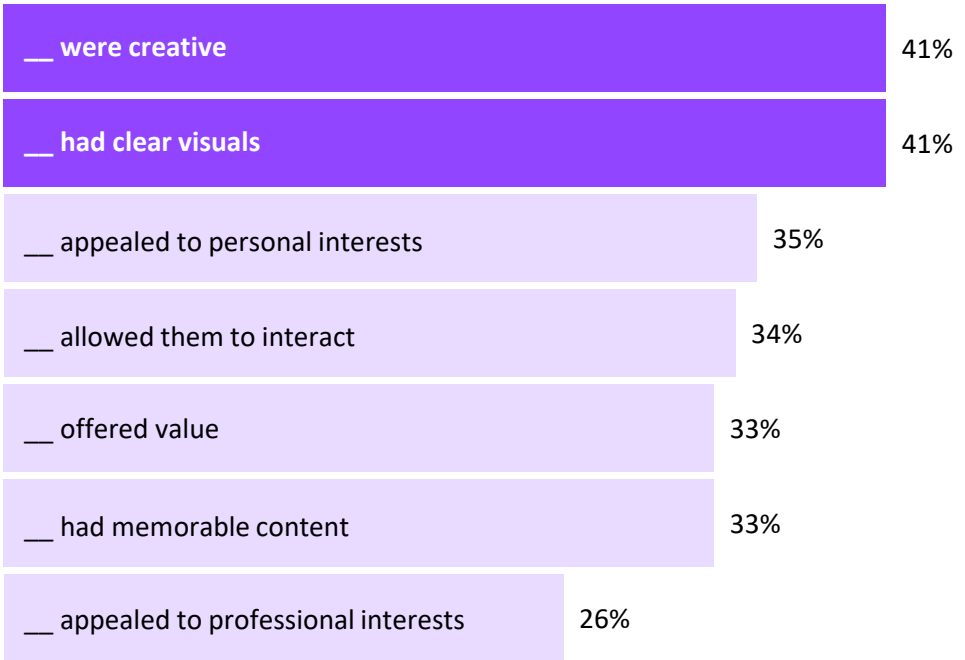| 86%	85%	85%	82%	82%
Listening to music or podcasts on a device	Checking trip details in the Uber app	Daydreaming or thinking about something	Looking at a device (e.g., phone)	Talking with others

MAGNA **MEDIA TRIALS** **Uber**

Creativity and clarity reign supreme

Prioritize creativity and clear visual when selecting which tablet ads to leverage

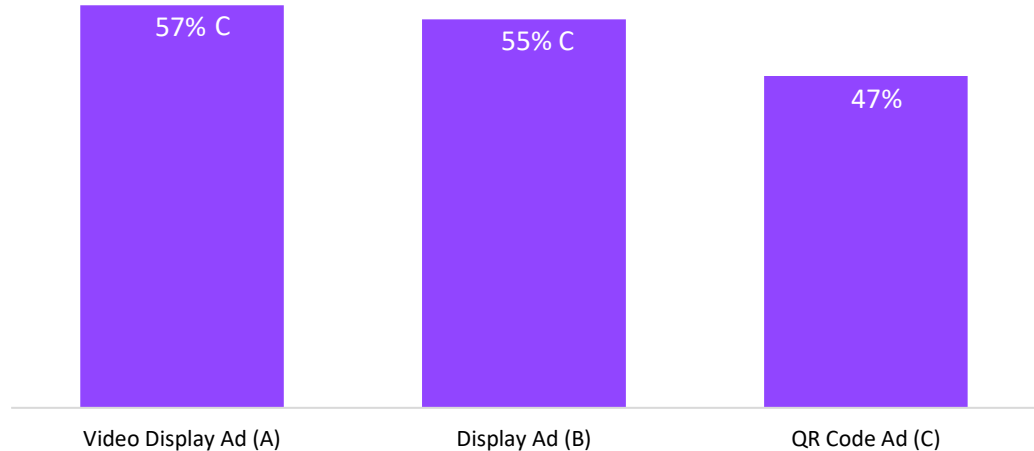**Elements about ads that caught riders' attention**
% Selected

The ad(s)…

__ were creative	41%
__ had clear visuals	41%
__ appealed to personal interests	35%
__ allowed them to interact	34%
__ offered value	33%
__ had memorable content	33%
__ appealed to professional interests	26%

0%   45%

MAGNA MEDIA TRIALS Uber

Consider video or display ads to encourage curiosity on-the-go

The ad would make me want to learn more about brand/product

We asked riders what they thought about three different types of ads by showing them a picture and asking how they felt about it. Each rider only answered questions about one type of ad.

Ad response by format
% Strongly agree or agree

Video Display Ad (A)	Display Ad (B)	QR Code Ad (C)
57% C	55% C	47%

MAGNA MEDIA TRIALS Uber

Timeliness beats exciting offers with coupon ads in rideshares

74%

Expressed interest in taking advantage of a coupon during a ride with Uber
% Very likely or likely

I would take advantage of the coupon if…
% Selected

__The coupon could be relevant to me in the future	49%
__ The coupon offered a discount for product or service I normally use	48%
__ The coupon was relevant to my needs at the time	45%
__ The coupons offer was exciting	39%

0%   30%   60%

MAGNA MEDIA TRIALS Uber

Brands should use QR codes in coupon ads to enable engagement

Note: Green shades in the heatmap represent varying degrees of intensity or values, with darker shades indicating higher values and lighter shades indicating lower values.

Preferred method for accessing a coupon during a ride with Uber
% Selected

	Through a QR code	By taking a picture of it	By entering my email	By entering my phone number	By verbally requesting through voice activation
Gen Z	38%	22%	15%	18%	7%
Millennials	38%	18%	21%	15%	6%
Gen X	40%	ide19%	19%	12%	8%
Boomers	26%	23%	24%	15%	4%

MAGNA MEDIA TRIALS Uber

Implications

1

Utilize rideshare ads to enhance rider experience and capture broad brand receptivity

2

Tailor ad content for relaxed and excited travelers during personal errands or leisure travel

3

Emphasize creativity and clarity in tablet ads, using video or display formats for enhanced interest

MAGNA MEDIA TRIALS Uber

MAGNA MEDIA TRIALS x Uber

Thank you!