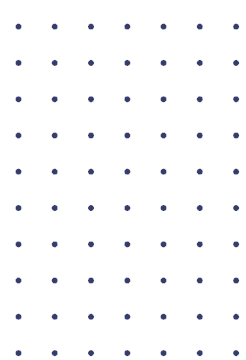
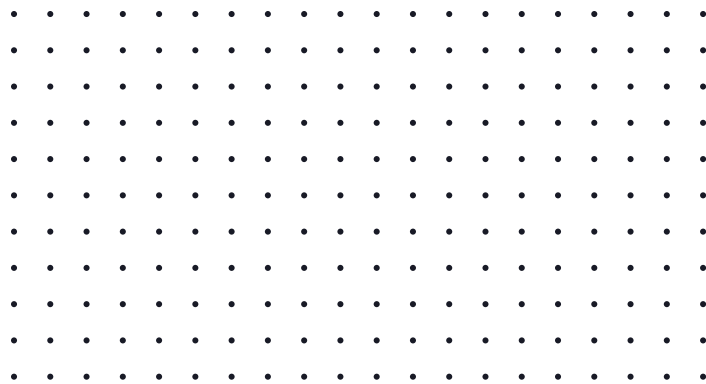


# Autonomous Vehicles Impact Report 2026

How Rideshare Activity and Earnings Are Shifting in AV-Active Markets





# Autonomous Vehicles Impact Report 2026

## How Rideshare Activity and Earnings Are Shifting in AV-Active Markets

This report examines annual changes in traditional rideshare performance across selected U.S. cities with active autonomous vehicle (AV) deployments, utilizing proprietary Gridwise Analytics data from Q1 2024 to Q4 2025. For the purposes of this report, we define autonomous vehicles (AVs) as all self-driving vehicles operating within a rideshare network, including both pooled and solo robo-taxi services. The analysis centers on human-operated rideshare activity in Atlanta, Austin, Los Angeles, Phoenix, and San Francisco metro areas, and includes a national benchmark for comparative purposes.

All earnings metrics in this report exclude tips unless otherwise specified. The analysis covers trips per hour, driver utilization, per-trip gross pay, hourly gross pay, and quarterly gross pay (all excluding tips). It also includes hourly base pay to show how base rate changes relate to hourly earnings, separate from tips and incentives. Tips per trip are presented separately to reflect changes in rider behavior. Autonomous rideshare (AV) trips are excluded from the dataset, and the report does not attribute observed changes in traditional rideshare performance to the presence of AVs.

In addition to historical trends, the report incorporates forward-looking projections from S&P Global to contextualize anticipated growth in both human-operated and autonomous rideshare (AV) segments. These perspectives collectively inform expectations regarding the evolution of rider activity, platform strategies, and labor dynamics in the near future.

To provide additional context on AV presence, this analysis also incorporates Waymo fleet size data by city, accurate as of November 2025. Autonomous vehicle trips are excluded from all driver performance metrics unless otherwise noted. This report covers markets where paid public AV rides can be requested.

## Active Autonomous Ride-Hail Markets

This table summarizes the cities where autonomous ride-hail services have been deployed for public use, along with their respective initial launch dates. Deployment is the point at which members of the public can request autonomous rides via a rideshare platform. The dates indicate the earliest known service availability in each market.

### Active U.S. Public AV Ride Markets (Paid and Free)

City / Market	Operator	Public rides start date	Fare status
Atlanta, GA	Waymo via Uber	Jun 24, 2025	Paid
Atlanta, GA	May Mobility via Lyft	Sep 10, 2025	Paid
Austin, TX	Waymo via Uber	Mar 4, 2025	Paid
Austin, TX	Tesla	Jun 22, 2025	Paid
Arlington, TX	May Mobility via Arlington Transportation	Limited Route	Paid (free to UTA Staff and students)
Dallas, TX	Avride via Uber	Dec 3, 2025	Paid
Los Angeles, CA	Waymo	Nov 12, 2024	Paid
Las Vegas, NV	Zoox	2025	Paid
Miami, FL	Waymo	Jan 22, 2026	Paid
Phoenix metro, AZ	Waymo	Dec 5, 2018	Paid
San Francisco Bay Area, CA	Zoox	2025	Paid
San Francisco, CA	Waymo	Jun 25, 2024	Paid

## Upcoming Autonomous Ride-Hail Markets

In addition to cities with active AV deployments, several new markets are expected to launch autonomous rideshare services in the coming year. The table below outlines publicly announced plans across operators and geographies, reflecting the next wave of AV expansion in the U.S.

### Upcoming U.S. AV Ride Hail Markets (Announced and Testing)

City / Market	Operator	Announced launch window
Arlington, TX	May Mobility via Uber	Announced for end 2025
Austin, TX	Zoox	Currently testing
Austin, TX	Volkswagen Group and Mobileye	2026
Atlanta, GA	Zoox	Currently testing
Detroit, MI	Waymo	2026
Dallas, TX	Mobileye AVs via Lyft (fleet owner/financing: Marubeni)	2026
Las Vegas, NV	Waymo	2026
Las Vegas, NV	Motional	2026
San Diego, CA	Waymo	2026
San Francisco Bay Area	Lucid Gravity + Nuro Driver via Uber	2026
Washington, DC	Waymo	2026

# Rideshare Outlook: Growth of Human Ridesharing and Autonomous Rideshare (AV)

S&P Global’s Mobility and Energy Future 2025 long-term forecast projects sustained growth in total rideshare activity, with autonomous rideshare (AV) expanding from a minimal presence to a significant market share over time. For the purposes of this report, human rideshare includes single as well as pooled rides, while autonomous rideshare includes both single Robo-Taxi rides and pooled Robo-Taxi rides. By 2030, autonomous ridesharing is projected to constitute approximately 10% of total rides.

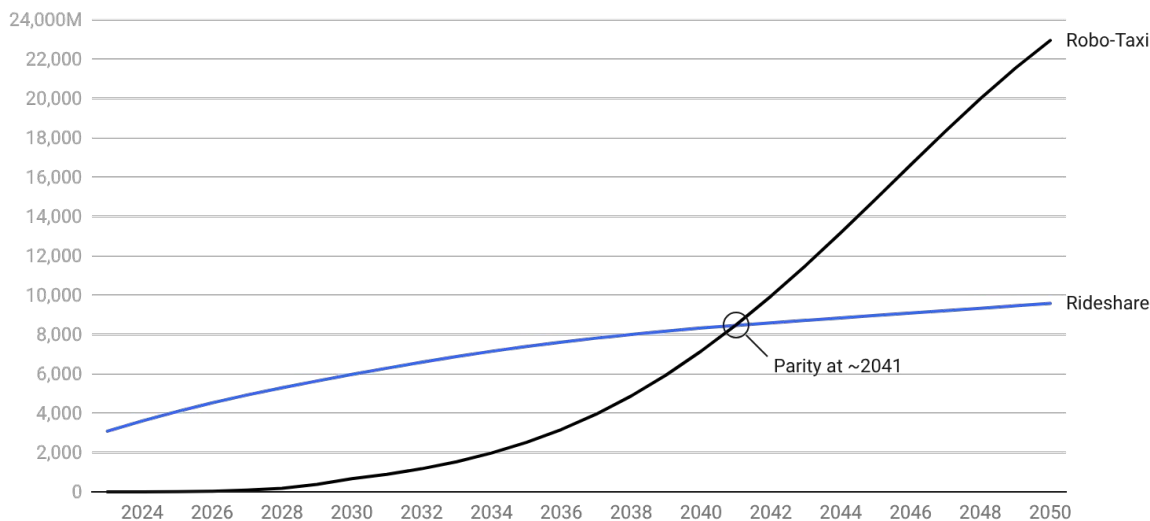
Over a longer time horizon, the same forecast indicates that autonomous rideshare will account for a substantial share of the market. AVs are projected to account for approximately one quarter of total rides by 2035 and to approach parity with human-operated rideshare by 2041. These projections contextualize the observed year-over-year changes in traditional driver activity and earnings discussed in subsequent sections.

## Robo-Taxis (AV’s) Projected to Overtake Human-Operated Rideshare by 2041

Annual ride volume for autonomous services is projected to accelerate rapidly in the 2030s, with AV rideshare surpassing human-operated rideshare around 2041. The projected crossover point underscores how quickly AV services are expected to scale once operational density is achieved.

### Projected rideshare rides in the USA

Projected annual total number of robo-taxi and human-driven rideshare rides in millions, including both single and pooled rides.



Source: S&P Global Mobility - Mobility and Energy Future 2025 | Created with Datawrapper

## Scalable AV Profitability Requires Pricing Near \$1 per Mile

Analysts believe broader adoption of autonomous vehicle rides will depend on bringing the cost per mile below \$1. Pricing at this level would significantly expand demand by making rides affordable to a broader set of riders.

According to S&P Global, projected pricing differs meaningfully by ride type. Compared with human-operated single rides, pooled human rides are estimated to cost about 25% less. Autonomous options show much larger reductions: robotaxi rides are projected to be approximately 61% cheaper, while robo-pooled rides are projected to be about 63% cheaper in comparison to human-operated single rides.

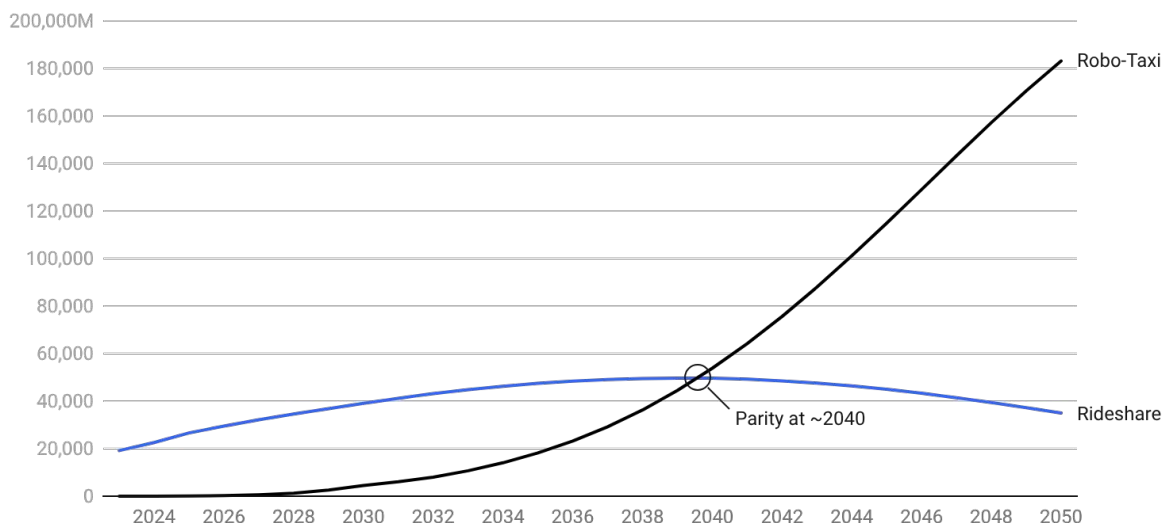
Under these projections, both AV ride types fall below the \$1 per-mile threshold and remain well below the \$3.25 median per-mile cost observed across human-operated rideshare in 2025.

## Miles Traveled by AVs is Projected to Surpass Human Drivers by 2040

S&P Global projects that total miles traveled by AVs are forecasted to reach parity with human-operated rideshare around 2040, one year earlier than total ride volume. This earlier crossover point suggests that AVs are forecasted to take on longer trips and operate at higher vehicle utilization rates. While long-term projections reflect a dramatic shift in scale, the following sections examine how driver outcomes have evolved in markets with AVs, alongside broader platform and market dynamics.

### Projected rideshare miles traveled in the USA

Projected annual total number of robo-taxi and human-driven rideshare miles traveled in millions.



Source: S&P Global Mobility - Mobility and Energy Future 2025 | Created with Datawrapper

# Early AV Rollouts Are Reshaping Driver Behavior and Platform Performance

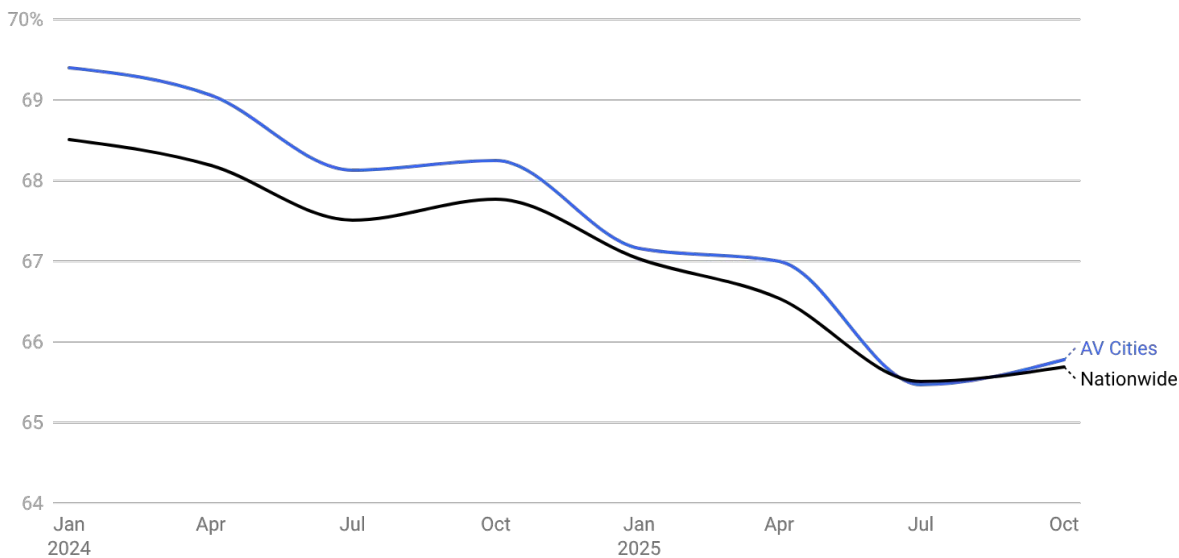
As autonomous vehicles (AVs) expand in select U.S. cities, Gridwise Analytics data shows that key rideshare metrics have followed different trajectories in AV-active markets compared to nationwide trends. This section focuses on two such differences: steeper declines in driver utilization and in trips completed per hour. These differences are based on observed activity among human rideshare drivers and exclude autonomous trip data.

## AV Cities See Faster Drop in Driver Activity

Utilization declined by 2.5% in AV-active cities, compared with a 2.1% decline nationwide, in Q4 2025 vs. Q4 2024, although they both follow the same downward trend. Utilization refers to the share of time a driver spends actively completing trips, relative to total platform-connected time. The decline in AV cities may reflect differences in local supply, demand, platform behavior, or market-specific dynamics.

### Driver utilization declined at a slightly steeper rate in AV cities

Median driver utilization rate for Uber and Lyft drivers in AV-present cities versus Nationwide by quarter



\*Utilization rate is defined by the total time on-task (request accepted to drop off) divided by the idle time plus the time on-task.

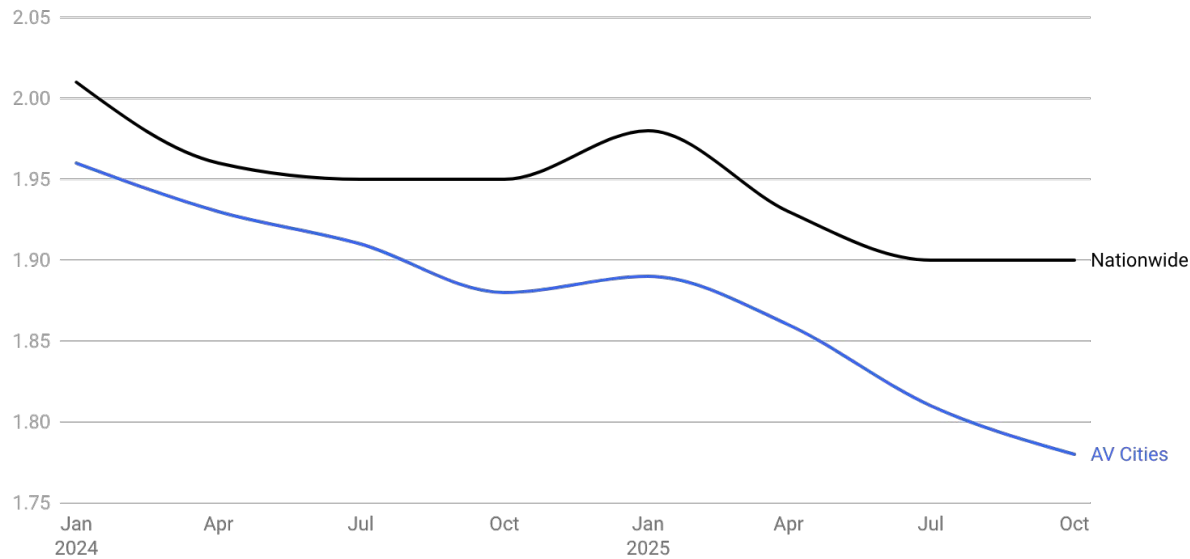
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas (AV cities) and Nationwide | Created by Susan Huntington | Created with Datawrapper

## Trips per Hour is Falling Faster in AV Markets

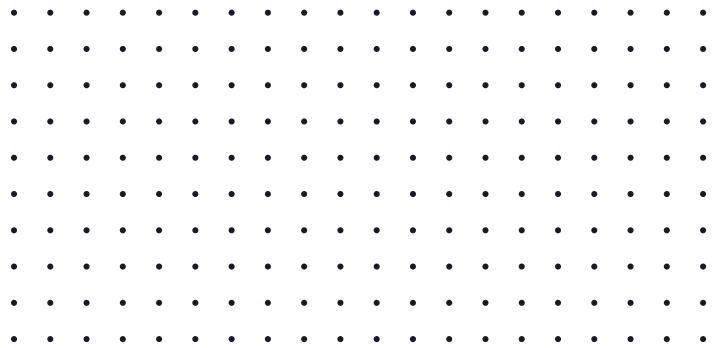
Rideshare drivers in AV-active cities completed 5.3% fewer trips per hour from Q4 2024 compared to Q4 2025, while Nationwide declined 2.6% over the same period. Although trips per hour declined in both AV cities and nationwide, the rate of decline was steeper in markets with autonomous vehicles. The gap widened modestly over the course of the year, particularly in the second half of 2025. The decrease in trips per hour may reflect differences in local supply, demand, platform operations, or other city-specific dynamics.

### Trips per hour are lower and declining faster in cities with AV

Median tasks completed per work hour for Uber and Lyft drivers in AV-present cities versus Nationwide by quarter



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas (AV cities) and Nationwide | Created by Susan Huntington | Created with Datawrapper



# A closer look at Metrics Across the US

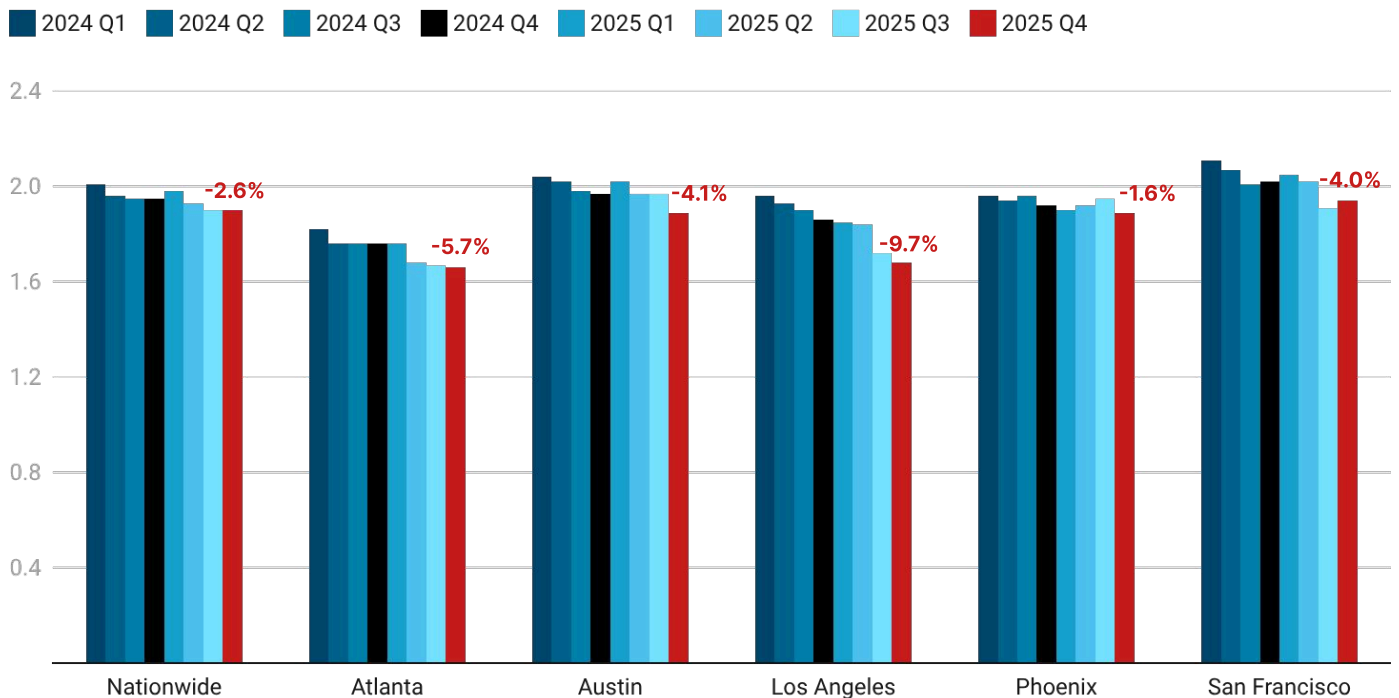
This section reviews year-over-year changes in key driver activity and earnings metrics across AV-active cities, with a national benchmark included for comparison. Earnings metrics shown here exclude tips, which are reported separately. Together, these indicators describe how driver productivity and earnings conditions shifted from Q4 2024 to Q4 2025.

## Trips per Hour: Most AV Cities Declined More Than Nationwide

Trips per hour declined year over year in AV cities, with a steeper drop than the nationwide average. Los Angeles saw the most significant decrease, while Atlanta and Austin also recorded notable declines. Phoenix and San Francisco also fell, though less sharply. Taken together, the data show a consistent reduction in the number of rides drivers completed per hour across all markets in the analysis.

### Trips per hour continues to decline Nationwide and in cities with robotaxis

Quarterly median trips per hour for Uber & Lyft drivers, with year-over-year changes highlighted for Q4



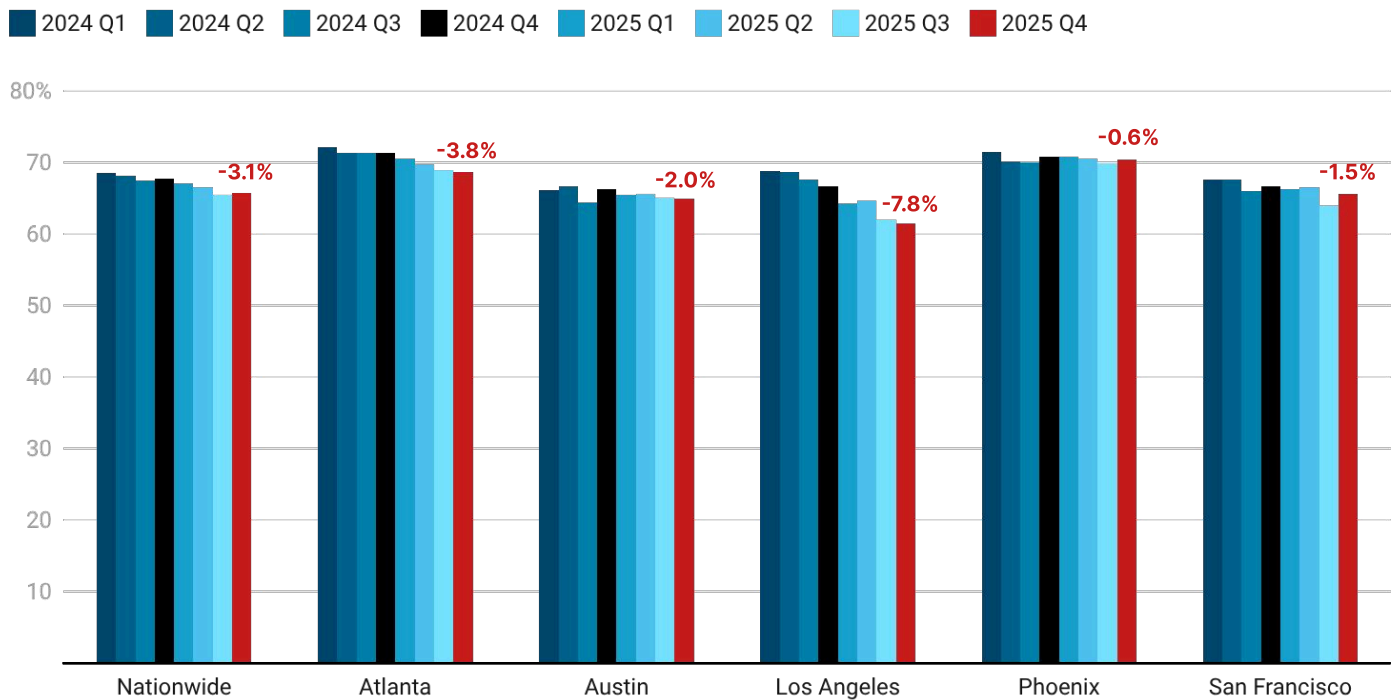
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

## Utilization: Less Time Spent on Active Trips

Utilization declined nationwide, with some cities with AV presence seeing a higher decline. Los Angeles recorded the largest decrease, but all five cities with AV presence showed reduced driver engagement. While the magnitude of decline varied, the overall trend was consistent: drivers spent less time actively working.

### Utilization rate drops across AV active cities and Nationwide year-over-year

Quarterly median utilization rate\* for Uber & Lyft drivers, with year-over-year changes highlighted for Q4



\*Utilization rate is defined by the total time on-task (request accepted to drop off) divided by the idle time plus the time on-task.

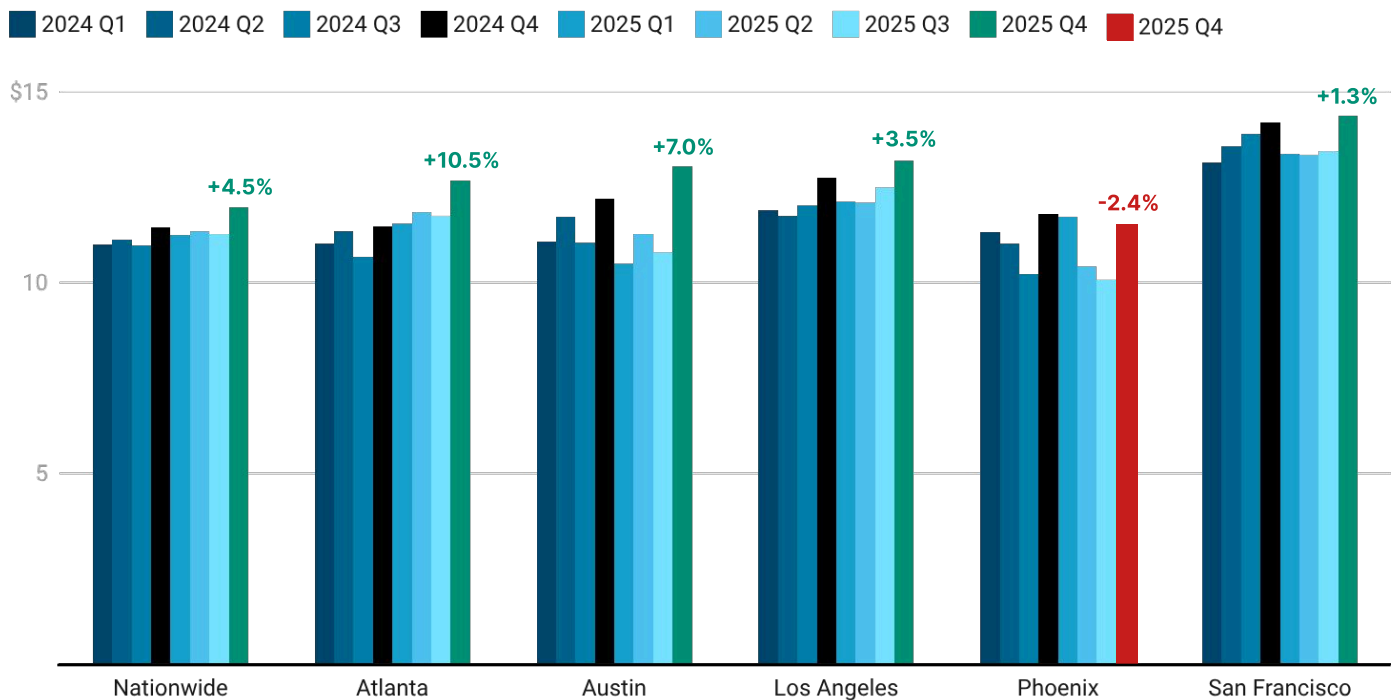
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

## Per-Trip Gross Pay: Higher Pay Per Ride in Most Cities

Most cities recorded year-over-year increases in gross pay per trip, helping to partially offset lower trip volume. In Atlanta and Austin, higher per-trip pay supported earnings despite reduced activity. Phoenix was the only market where per-trip pay remained lower year over year, although gross pay per trip increased in Q4 2025, partially correcting earlier declines. Overall, changes in per-trip earnings appear to reflect pricing adjustments and shifts in ride mix rather than longer trip distances.

### Pay per trip increases Nationwide and in AV-present cities, except in Phoenix

Quarterly median gross pay (excluding tips) per trip for Uber & Lyft drivers, with year-over-year changes highlighted for Q4



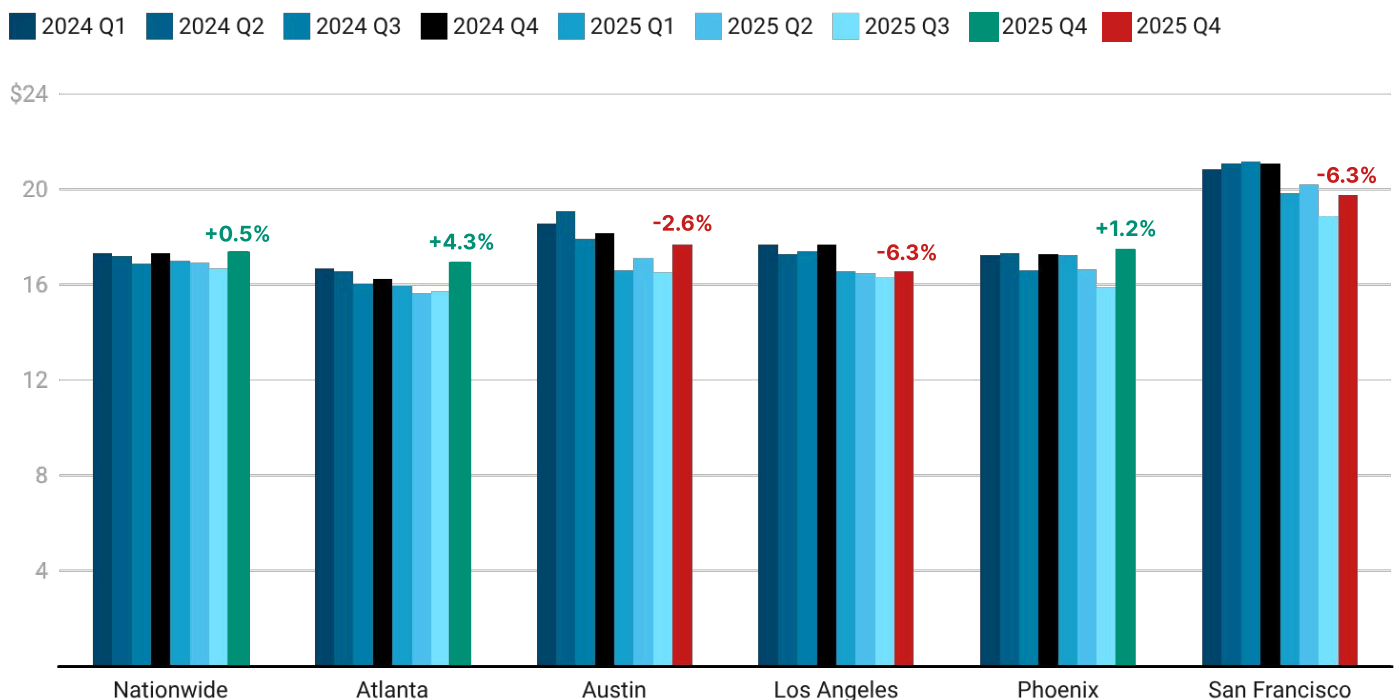
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

## Hourly Base Pay: Declines Concentrated in Three Markets

Hourly base pay declined year over year in Q4 in Austin, Los Angeles, and San Francisco, with the largest declines in Los Angeles and San Francisco. It is important to distinguish the Q4 year-over-year comparison from how pay moved within 2025. In Austin, Los Angeles, Phoenix, and San Francisco, Q4 2025 base pay increased versus Q3 2025, even though Austin, Los Angeles, and San Francisco still finished below Q4 2024. Nationwide base pay increased year over year in Q4, with gains in Atlanta and Phoenix as well. Overall, Q4 results show year-over-year pressure in three metros, alongside improvement late in 2025 in several markets.

### Hourly base pay decreases in Austin, Los Angeles, and San Francisco

Quarterly median base pay per hour for Uber & Lyft drivers, with year-over-year changes highlighted for Q4



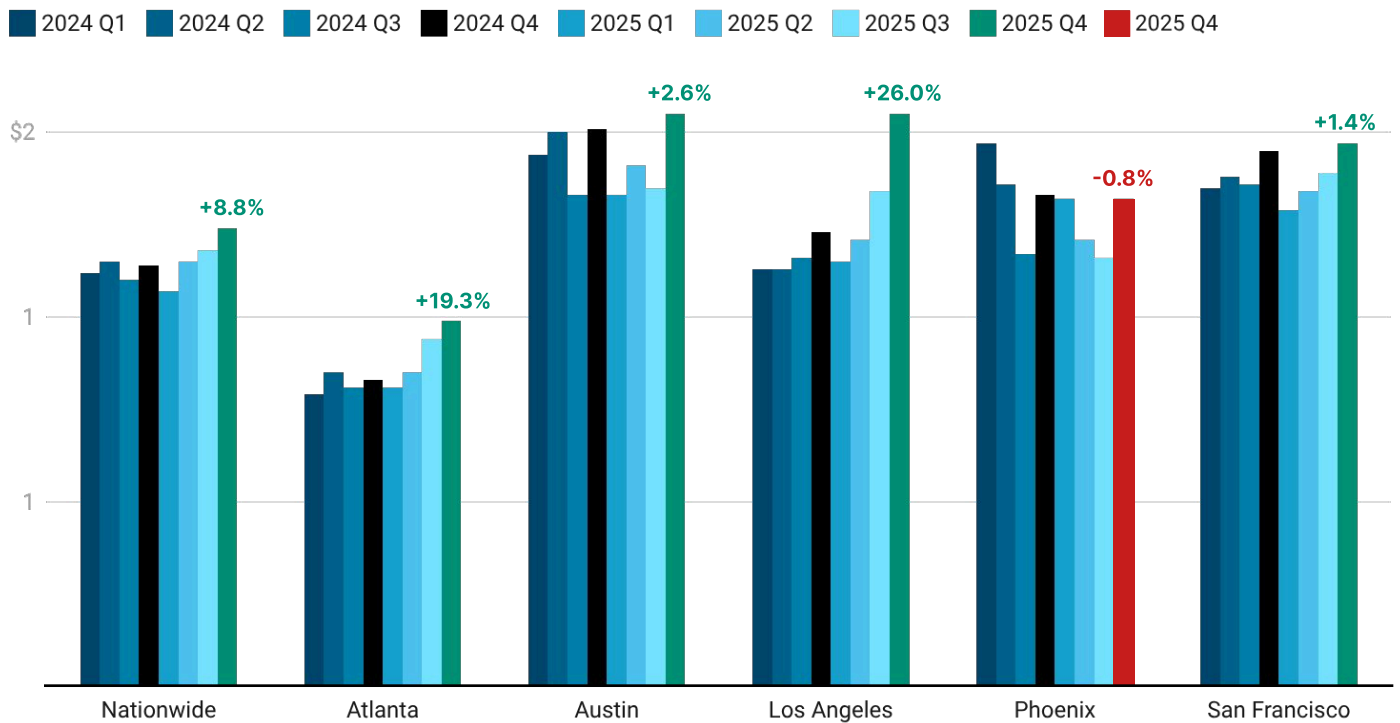
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

## Tips per Trip: Strong Gains in Select Markets

Tips increased in most cities, with the largest gains in markets that also saw the biggest declines in trip volume. Los Angeles and Atlanta recorded the strongest increases, while other markets saw more modest changes. In Phoenix, tips declined slightly year over year in Q4, even though tipping increased from Q3 to Q4 2025. Although tips supported per-trip pay in several markets, they were not the primary factor driving differences in earnings outcomes across cities.

### Tips increase significantly from 2024 to 2025 in Atlanta, LA, and Nationwide

Quarterly average tip pay per trip for Uber & Lyft drivers, with year-over-year changes highlighted for Q4



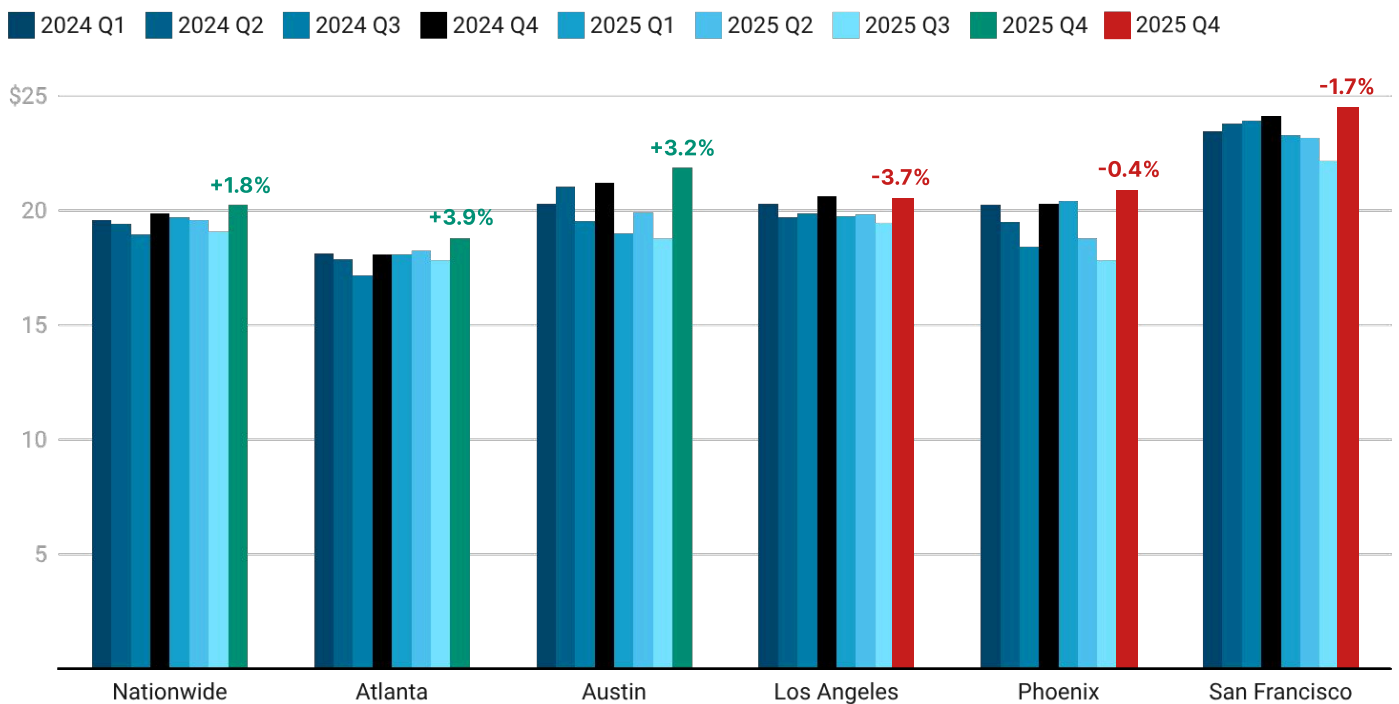
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

# Hourly Gross Earnings Outcomes Vary by Market

Atlanta and Austin posted modest increases in hourly pay (excluding tips) in Q4, suggesting that higher per-trip pay partially offset fewer trips. In contrast, Los Angeles and San Francisco recorded clear year-over-year declines in Q4 hourly pay, while Phoenix was roughly flat to slightly lower. However, the 2025 trend matters as context: in these three markets, Q4 2025 pay improved from Q3 2025, even though it remained below Q4 2024. Overall, the results point to local differences in how compensation was adjusted as trip volumes softened.

## Hourly pay decreases in Los Angeles, Phoenix, and San Francisco

Quarterly median gross pay (excluding tips) per hour for Uber & Lyft drivers, with year-over-year changes highlighted for Q4



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

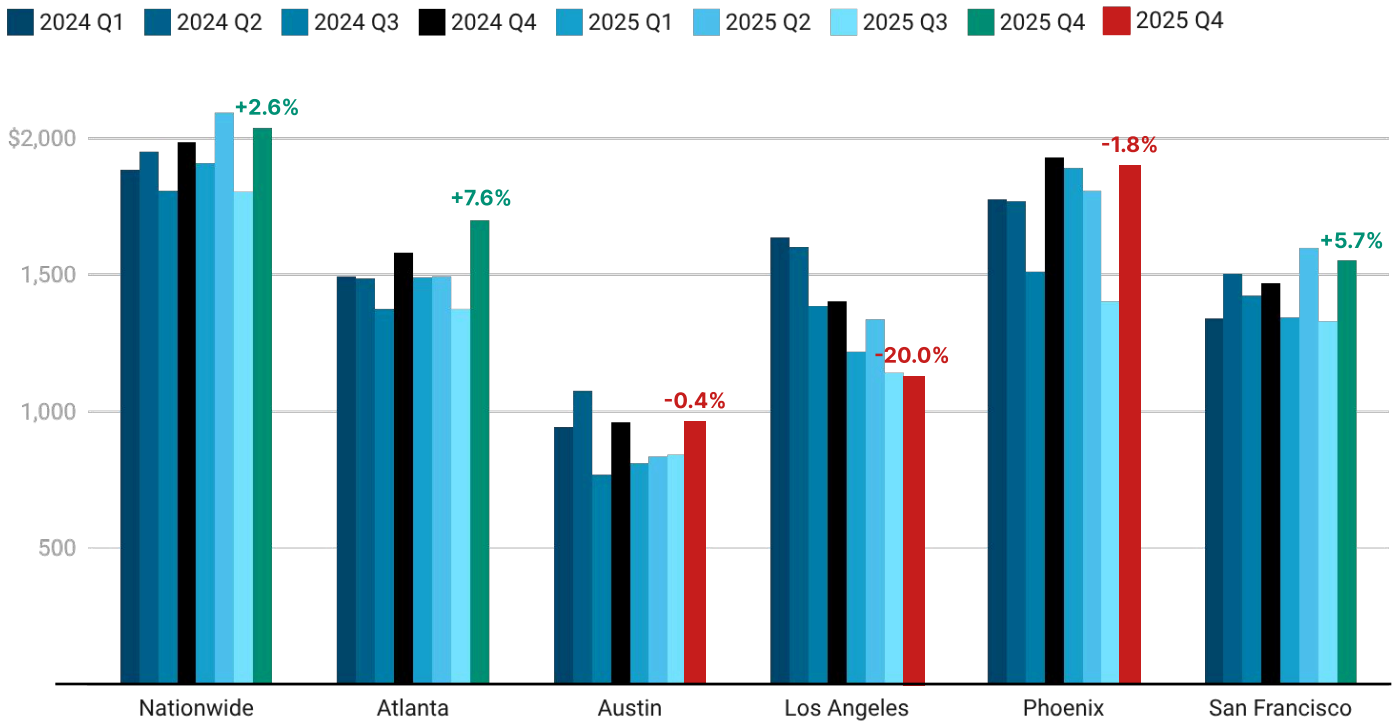
## Quarterly Gross Pay: Gains in Some Markets, Losses in Others

Quarterly gross pay diverged across markets in Q4. Atlanta and San Francisco recorded year-over-year gains, showing that higher per-trip earnings can offset weaker trip volume over a full quarter. Atlanta's increase aligned with stronger per-trip pay and higher hourly base pay. San Francisco's quarterly gross pay rose even though hourly pay declined, which is consistent with drivers working more hours overall.

Austin, Los Angeles, and Phoenix declined year over year in Q4. In each case, lower activity and weaker pay components outweighed per-trip gains. Los Angeles saw the largest decline, driven by a sharp drop in activity.

### Gross pay decreased year-over-year in Austin, Los Angeles, and Phoenix

Quarterly median gross pay (excluding tips) for Uber & Lyft drivers, with year-over-year changes highlighted for Q4



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

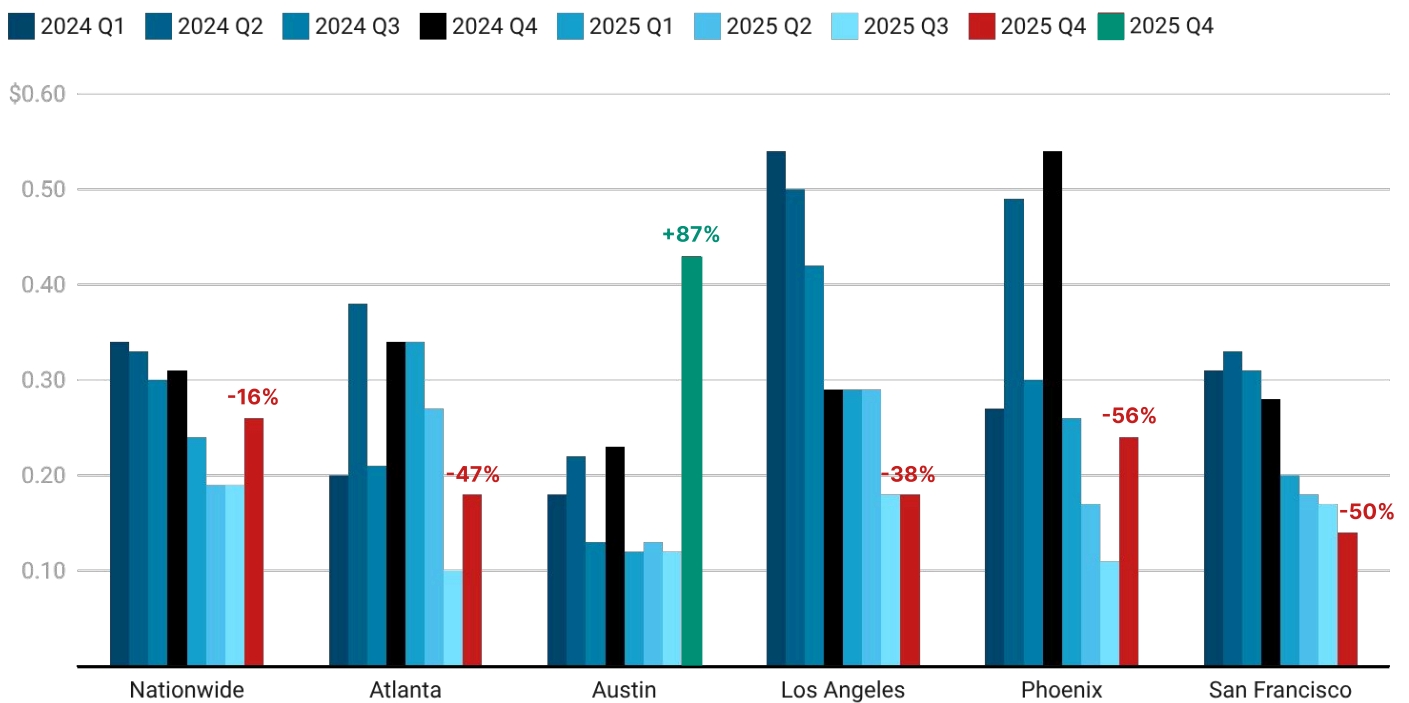
## Quarterly Incentives: Mixed Changes Across Markets

Across most markets, incentives trended downward over the full Q1 2024 to Q4 2025 period, even though some cities saw increases in Q4 2025. These late-year gains appear to be seasonal trends rather than a shift in longer-term incentive strategies.

Austin is one example where we see that incentives declined for most of the period, with a Q4 increase standing out as a short-term exception. Phoenix's year-over-year decline also reflects unusually high incentive levels in Q4 2024, which makes the comparison to Q4 2025 look more negative, even though incentives rose late in 2025.

### Incentives spike +87% year-over-year in Austin in Q4 2025

Quarterly average incentives per trip for Uber & Lyft drivers, with year-over-year changes highlighted for Q4



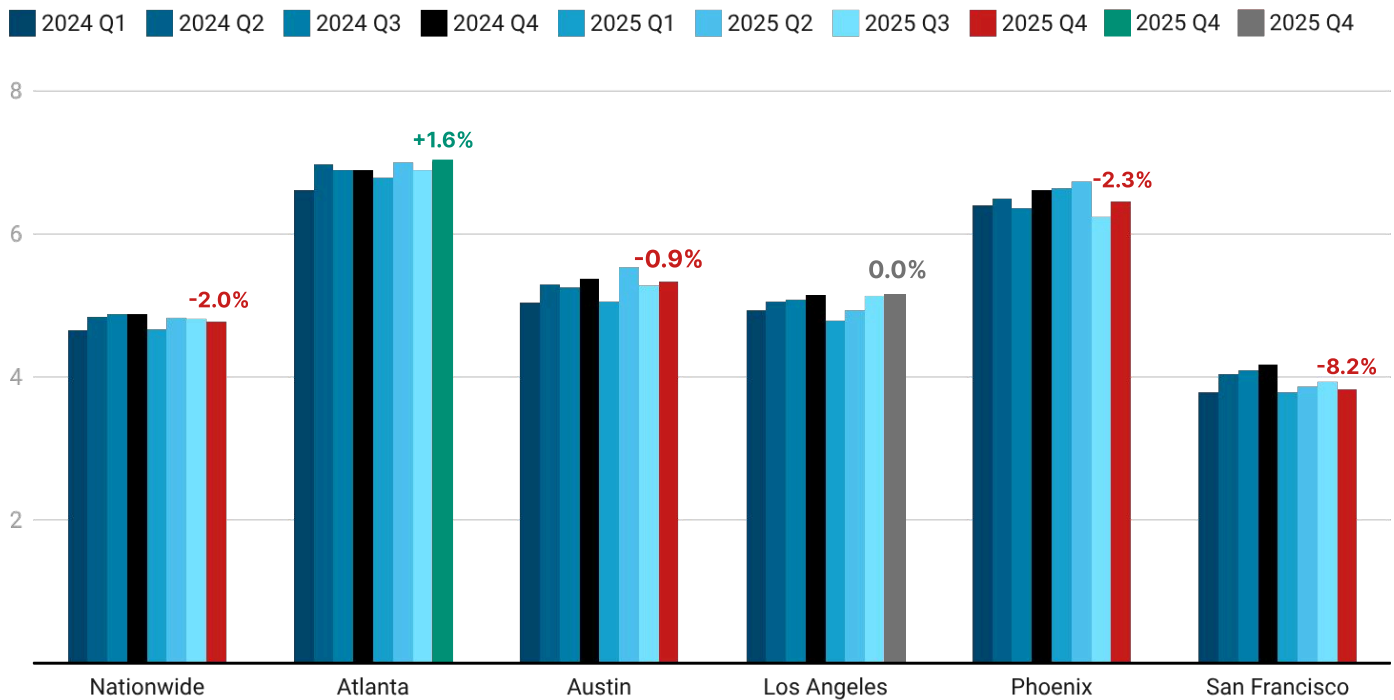
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

## Trip Distance: Flat or Declining Across Most Cities

Trip distances remained largely unchanged or declined, indicating that earnings increases were not attributable to longer rides. Atlanta was the only market with a slight increase, while San Francisco experienced the most pronounced decline. Overall, these results indicate that per-trip pay was influenced more by pricing and ride mix than by distance.

### San Francisco trip distances fell 8% in 2025; elsewhere they were largely steady

Quarterly median trip distance (passenger pickup to dropoff) for Uber & Lyft rides, with year-over-year changes highlighted for Q4



Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper

## Comparative Summary of Key Driver Metrics Across AV-Active Cities

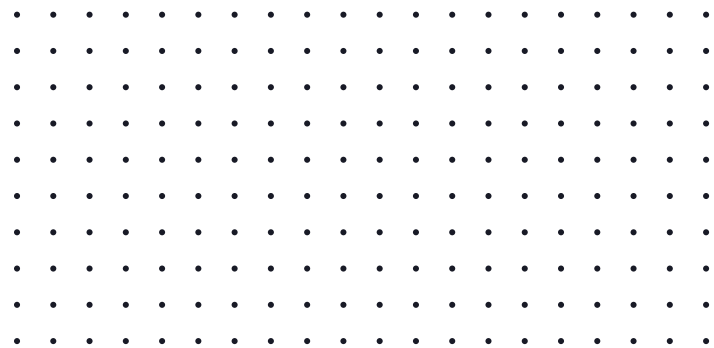
The following chart summarizes Q4 year-over-year changes across key driver metrics in each AV-active city. It provides a comparative view of how activity levels, pay components, and earnings outcomes shifted during the analysis period. This table supports the individual metric charts and introduces the city-specific analysis that follows.

### City-level changes across key driver metrics year-over-year

Percent difference between Q4 2024 and Q4 2025 in quarterly median per metric cited in table

City	Per-Trip Base Pay	Per-Trip Tip Pay	Per-Trip Gross Pay	Hourly Base Pay	Hourly Gross Pay	Quarterly Gross Pay	Trips per Hour	Utilization	Trip Distance
Nationwide	2.6%	8.8%	4.5%	0.5%	1.8%	2.6%	-2.6%	-3.1%	-2.0%
Atlanta	9.4%	19.3%	10.5%	4.3%	3.9%	7.6%	-5.7%	-3.8%	1.6%
Austin	-1.4%	2.6%	7.0%	-2.6%	3.2%	-0.4%	-4.1%	-2.0%	-0.9%
Los Angeles	1.3%	26.0%	3.5%	-6.3%	-3.7%	-20.0%	-9.7%	-7.8%	0.0%
Phoenix	0.7%	-0.8%	-2.4%	1.2%	-0.4%	-1.8%	-1.6%	-0.6%	-2.3%
San Francisco	-3.7%	1.4%	1.3%	-6.3%	-1.7%	5.7%	-4.0%	-1.5%	-8.2%

Created with Datawrapper  
 Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q4 2024 & Q4 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington | Created with Datawrapper



# City-by-City Deep Dive

## Atlanta: Higher Pay Despite Fewer Trips

In Atlanta, several driver pay metrics were higher in Q4 2025 than in Q4 2024, even though there was a drop in trips per hour and utilization. Hourly gross pay excluding tips increased, alongside higher hourly base pay. Pay per trip excluding tips also rose, and base pay per trip was higher year over year. Tips per trip increased as well. Incentives per trip were lower, so the per-trip lift may be more aligned with base pay than incentives.

### Atlanta: Summary of Year-over-Year Changes (Q4 2024 to Q4 2025)

Marketplace activity	Trip profile	Earnings outcomes	Per-trip pay components
Trips per hour: ▼ 5.7%	Trip distance: ▲ 1.6%	Per trip gross pay: ▲ 10.5%	Base pay (per trip): ▲ 9.4%
Utilization: ▼ 3.8%	Premium ride share: Flat	Hourly base pay: ▲ 4.3%	Tips per trip: ▲ 19.3%
		Hourly gross pay: ▲ 3.9%	Incentives: ▼ ~47%
		Quarterly gross pay: ▲ 7.6%	

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q4 2024 & Q4 2025 | Geography: Atlanta Metro Area

## Austin: Higher Per Trip Pay, Lower Overall Earnings

In Austin, quarterly gross pay was slightly lower in Q4 2025 than in Q4 2024. Trips per hour and utilization were also lower, pointing to softer driver activity. Hourly base pay declined, despite an increase in pay per trip. That increase appears to be driven by higher incentives and slightly higher tips, even as base pay per trip edged down. Hourly gross pay rose slightly, which may indicate that variable pay helped support hourly outcomes. However, quarterly gross pay suggests that per-trip increases were not enough to offset lower activity and weaker base rates across the quarter.

### Austin: Summary of Year-over-Year Changes (Q4 2024 to Q4 2025)


Marketplace activity	Trip profile	Earnings outcomes	Per-trip pay components
Trips per hour: ▼ 4.1%	Trip distance: ▼ 0.9%	Per trip gross pay: ▲ 7.0%	Base pay (per trip): ▼ 1.4%
Utilization: ▼ 2.0%	Premium ride share: ▲ 5% (25% → 30%)	Hourly base pay: ▼ 2.6%	Tips per trip: ▲ 2.6%
		Hourly gross pay: ▲ 3.2%	Incentives: ▲ 87%
		Quarterly gross pay: ▼ 0.4%	

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q4 2024 & Q4 2025 | Geography: Austin Metro Area

## Los Angeles: Higher Per-Trip Pay, Lower Total Earnings

In Los Angeles, earnings fell sharply in Q4 2025. Quarterly gross pay excluding tips dropped materially year over year, alongside a clear decline in hourly gross pay and hourly base pay. Modest gains in per-trip pay and tips were not enough to offset weaker activity and lower incentives, resulting in significantly lower overall earnings.

### Los Angeles: Summary of Year-over-Year Changes (Q4 2024 to Q4 2025)

 Waymo robotaxi fleet size in Los Angeles **700**

Marketplace activity	Trip profile	Earnings outcomes	Per-trip pay components
Trips per hour: ▼ 9.7%	Trip distance: 0.0%	Per trip gross pay: ▲ 3.5%	Base pay (per trip): ▲ 1.3%
Utilization: ▼ 7.8%	Premium ride share: ▲ 3%	Hourly base pay: ▼ 6.3%	Tips per trip: ▲ 26.0%
		Hourly gross pay: ▼ 3.7%	Incentives: ▼ ~38%
		Quarterly gross pay: ▼ 20.0%	

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q4 2024 & Q4 2025 | Geography: Los Angeles Metro Area

## Phoenix: Weaker Outcomes

In Phoenix, earnings remained under pressure in Q4 2025. Hourly and quarterly gross pay excluding tips both declined year over year. Activity was slightly weaker, with modest declines in trips per hour, utilization, and trip distance. Lower per-trip pay and softer tipping added further pressure. Hourly base pay increased slightly but was not enough to offset weaker activity. Incentives were down year over year, with the decline skewed by unusually high incentive levels in Q4 2024.

### Phoenix: Summary of Year-over-Year Changes (Q4 2024 to Q4 2025)

 Waymo robotaxi fleet size in Phoenix **500**


Marketplace activity	Trip profile	Earnings outcomes	Per-trip pay components
Trips per hour: ▼ 1.6%	Trip distance ▼ 2.3%	Per trip gross pay: ▼ 2.4%	Base pay: ▲ 0.7%
Utilization: ▼ 0.6%	Premium ride share: ▲ 2% (12% → 14%)	Hourly base pay: ▲ 1.2%	Tips per trip: ▼ 0.8%
		Hourly gross pay: ▼ 0.4%	Incentives: ▼ ~56%
		Quarterly gross pay: ▼ 1.8%	

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q4 2024 & Q4 2025 | Geography: Phoenix Metro Area

# San Francisco: Higher Earnings Despite Lower Efficiency

In San Francisco, quarterly gross pay increased in Q4 2025 versus Q4 2024, despite lower trips per hour, reduced utilization, and weaker hourly pay. Pay per trip excluding tips edged up and tips were slightly higher. Incentives were lower year over year. Trip distance dropped notably. The mix suggests quarterly earnings could rise even if hourly pay and activity rates decline. This can occur if drivers worked more total hours across the quarter, or if the distribution of hours shifted toward more active drivers.

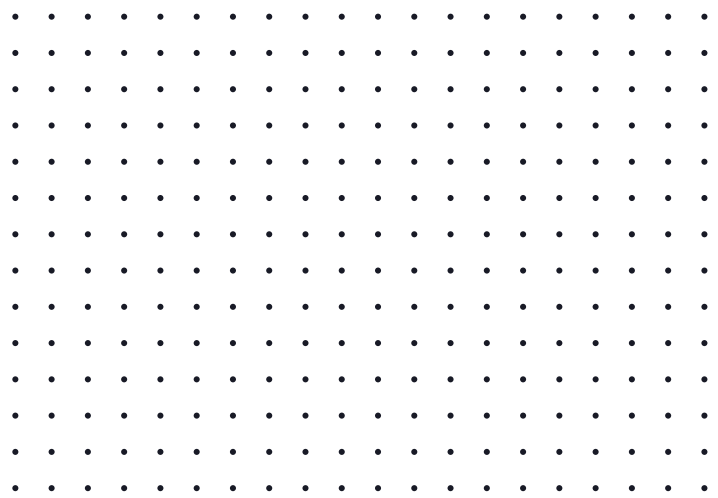
## San Francisco: Summary of Year-over-Year Changes (Q4 2024 to Q4 2025)



Waymo robotaxi fleet size in San Francisco **1,000**

Marketplace activity	Trip profile	Earnings outcomes	Per-trip pay components
Trips per hour: ▼ 4.0%	Trip distance: ▼ 8.2%	Per trip gross pay: ▲ 1.3%	Base pay: ▼ 3.7%
Utilization: ▼ 1.5%	Premium ride share: Flat	Hourly base pay: ▼ 6.3%	Tips per trip: ▲ 1.4%
		Hourly gross pay: ▼ 1.7%	Incentives: ▼ ~50%
		Quarterly gross pay: ▲ 5.7%	

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q4 2024 & Q4 2025 | Geography: San Francisco Metro Area



# Key Findings and Market Implications

Across AV-active markets, traditional rideshare drivers completed fewer trips and spent less time on active rides in Q4 2025 compared to Q4 2024. Declines in utilization and trips per hour were observed across all cities, though more pronounced in AV cities, and were the primary drivers of earnings outcomes during the period. Hourly base pay diverged by market, declining in Los Angeles, Austin, and San Francisco while increasing modestly in Atlanta and Phoenix.

In several markets, higher per-trip pay and increased tipping partially offset lower trip frequency, supporting hourly or total earnings in cities such as Atlanta and San Francisco. These offsets were uneven, however, and were not sufficient to prevent year-over-year declines in overall earnings in markets including Los Angeles and Phoenix.

Earnings outcomes varied by city. In Atlanta and San Francisco, higher per-trip pay helped offset reduced activity, resulting in higher total earnings. In Austin, incentives and per-trip gains supported hourly earnings, though quarterly earnings declined. Los Angeles and Phoenix experienced earnings declines as reduced activity outweighed per-trip improvements. Gridwise Analytics data does not establish a causal link between AV deployment and these trends.

## Interested In Next-Level Insights?

Gridwise Analytics turns comprehensive, anonymized gig mobility data into actionable market-level intelligence for platforms, fleets, merchants, and investors.

To learn how these insights can be tailored to your business, contact us at [sales@gridwise.io](mailto:sales@gridwise.io), visit [www.gridwise.io/analytics](http://www.gridwise.io/analytics) or click the link below:

<https://gridwise.io/business/contact/> >

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**Image credit**  
GrowSF, Zoon



## CORRELATIONS WITH PUBLICLY AVAILABLE DATA

Gridwise Analytics provides enterprises with a highly representative view of market dynamics through its extensive panel of gig drivers and mobility data across the US. The datasets are aggregated and anonymized to ensure a high degree of accuracy, with some metrics showing up to 98% correlation with key quarterly figures reported by some major gig platforms.

For example, when analyzing average daily Uber and Lyft trips in the New York City metro area, our data closely aligned with official figures reported by the platforms. This correlation highlights Gridwise Analytics' capability to provide unbiased, large-scale mobility insights that offer enterprises a holistic market perspective beyond individual platform data.



## DATA PROCESSING PIPELINE

To ensure seamless and reliable data analysis, Gridwise Analytics has developed a robust data pipeline that processes and analyzes millions of data points on a daily basis in order to enable enterprises to make informed decisions with confidence. The key processing steps include:

- **Automatic Data Collection:** Driver activity is automatically recorded and tracked through the Gridwise app.
- **Data Quality and Enrichment:** Collected data undergoes rigorous cleansing, enrichment, validation, anonymization, and aggregation to maintain accuracy and integrity.
- **Data Intelligence:** Multiple layers of data—including supply, demand, routing, earnings, and utilization—are integrated and analyzed to generate comprehensive insights.

The final output provides a complete view of pickups, drop-offs, trip routes, and unit economics, which serve as a valuable foundation for operational, investment, and strategic decision-making.



## DIVERSE AND REPRESENTATIVE DATASET

Gridwise Analytics' data network offers a more diverse and representative view of gig mobility compared to traditional sources. Unlike single-transaction receipt data, which captures the experience of a single consumer, Gridwise's scale enables broader insight. On average, each gig driver in our dataset represents approximately 19 consumer trips per week, creating a more robust and diversified sample of gig activity and consumer behavior.

By combining extensive first-party gig mobility data with a proprietary data processing pipeline, Gridwise Analytics ensures the delivery of high-quality, actionable insights to industry stakeholders.



## LIMITATIONS & CONSIDERATIONS

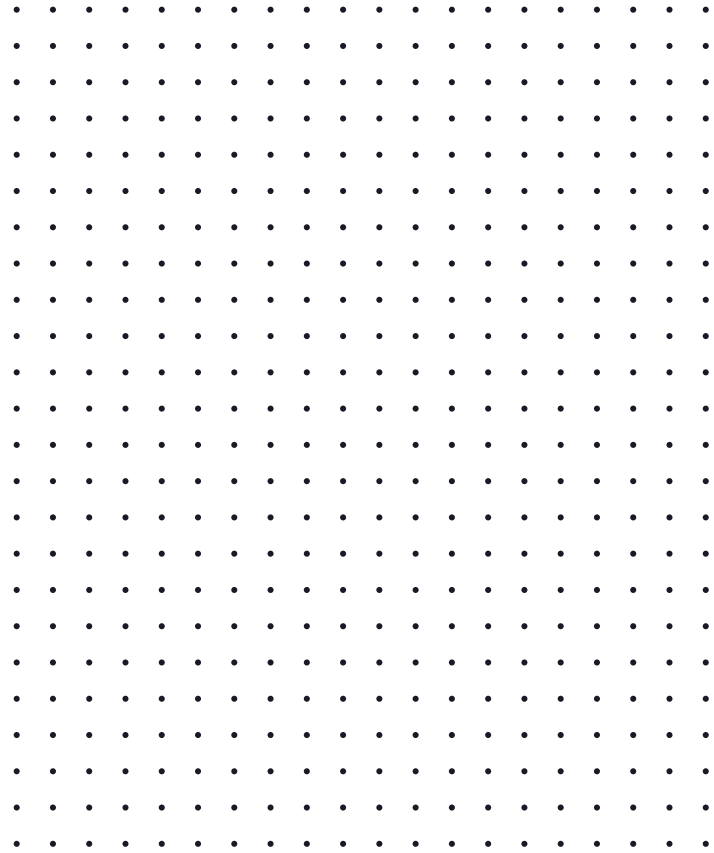
- **Regulatory and Policy Changes:** External factors such as labor laws, platform policies, or regulatory shifts may impact gig work dynamics. These changes could influence the rate at which drivers from certain platforms engage with Gridwise, affecting market representation over time.



## WHY WE USE YEAR-OVER-YEAR COMPARISONS IN THIS REPORT

Rideshare earnings exhibit recurring seasonal patterns across U.S. markets, with periods of lower demand and reduced incentive spending contributing to short-term fluctuations. These effects can obscure underlying trends when viewed through month-over-month or quarter-to-quarter changes alone.

To account for seasonality, Gridwise Analytics look at year-over-year comparisons rather than short-term period changes in this report. This approach reduces seasonal distortion and provides a clearer view of how earnings and activity in AV-active markets are trending relative to prior performance.



[www.gridwise.io/analytics](http://www.gridwise.io/analytics)

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