GRIDWISE ANALYTICS

Autonomous Vehicles Impact Report:
Have They Disrupted Traditional Rideshare?

Early Effects Of AVs On Driver Metrics Across U.S. Cities

Year-over-year shifts in pay, utilization, incentives, and productivity across AV cities and the broader U.S.

Autonomous vehicles (AVs) continue to be expected to reshape the rideshare industry—lowering costs, introducing new service models, and driving operational changes for platforms in core markets. Waymo began full commercial service in Phoenix on October 8, 2020, expanded to San Francisco on June 25, 2024, and added Los Angeles on November 12, 2024. In Austin, Waymo service launched on March 4, 2025 through a Uber partnership, followed by Tesla's limited Cybercab rollout on June 22, 2025.

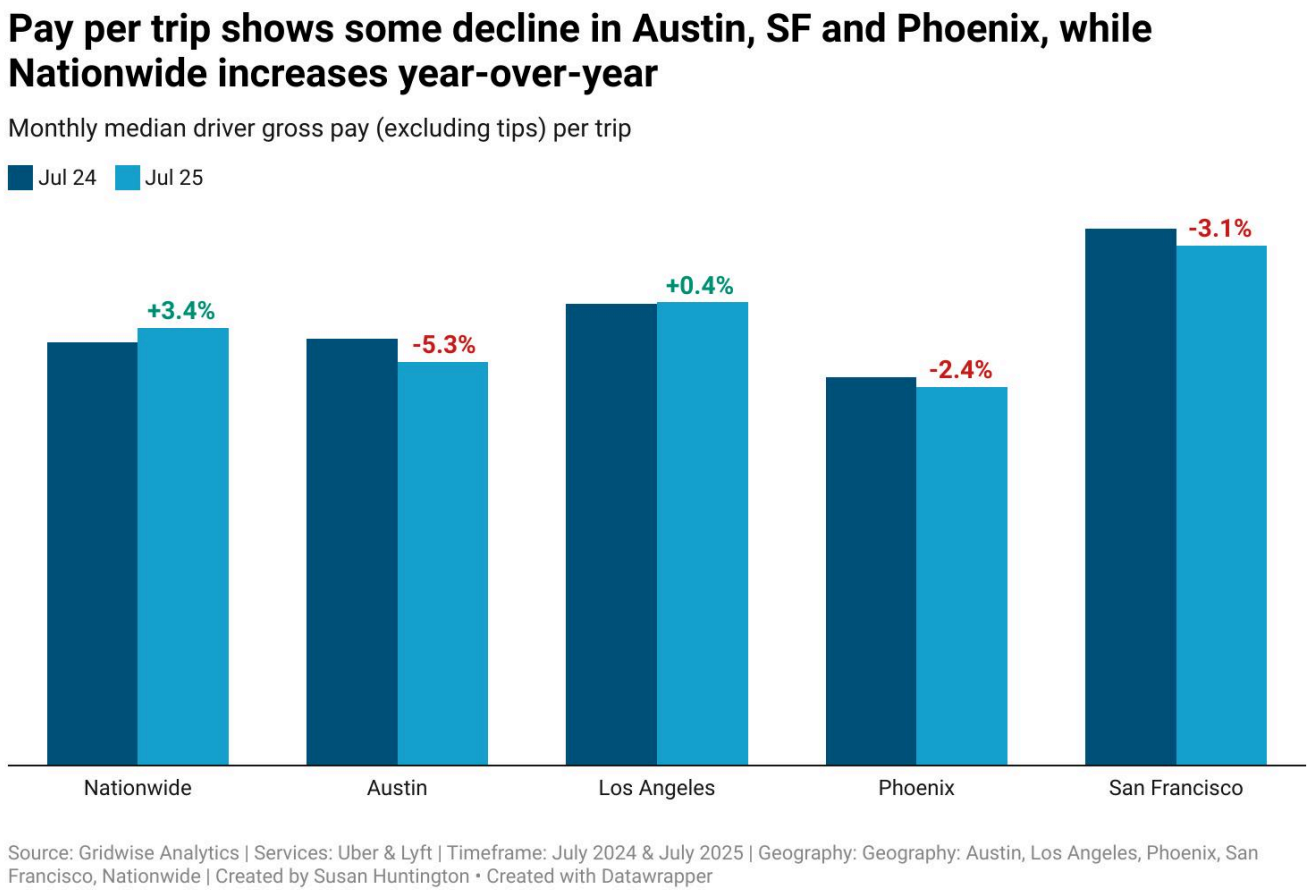
This report examines year-over-year changes across four AV-active cities—Austin, Phoenix, Los Angeles, and San Francisco—using a nationwide baseline for comparison. It focuses on six core indicators: gross pay* per trip, gross pay per work hour, total gross income, trips per hour, driver utilization, and incentive pay.

*Gross pay (excluding tips) includes: base pay, trip bonuses, multi-trip and non-trip incentives, and adjustments.

Pay Per Trip Growth was Below the National Average Across All AV Markets

Across the U.S., per-trip earnings increased slightly year-over-year. Gridwise Analytics data shows a 3.4% increase in nationwide median per-trip gross pay between July 2024 and July 2025.

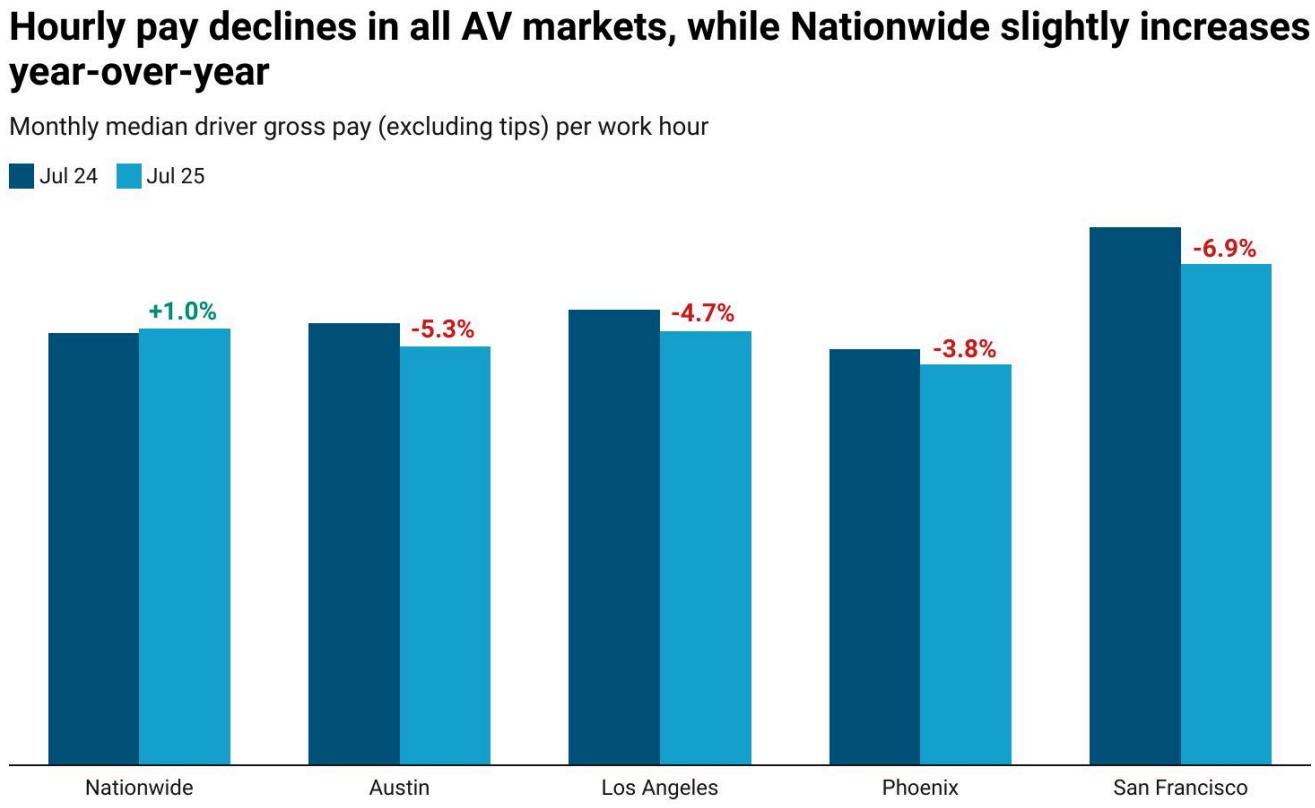
However, some AV-active cities diverged from this pattern. Austin saw a 5.3% decline, and Phoenix dropped 2.4% over the same period YoY. San Francisco also posted a 3.1% decrease, while Los Angeles held nearly flat with a 0.4% gain.



Hourly Pay Dropped in Every AV Market, While Nationwide Pay Increased

Hourly pay fell across all AV-active cities from July 2024 to July 2025, with the sharpest drops observed in Austin (–5.3%) and San Francisco (–6.9%). Los Angeles (–4.7%) and Phoenix (–3.8%) also posted year-over-year declines, though to a lesser extent.

In contrast, the nationwide median hourly pay rose 1.0% over the same period. Because hourly pay reflects both earnings and ride volume, these declines may reflect shifts in rideshare demand, potentially influenced by early AV deployment as well as other factors such as rider mix, trip length, or incentive changes. We can see this reflected in Trips per Hour shown on page 6.



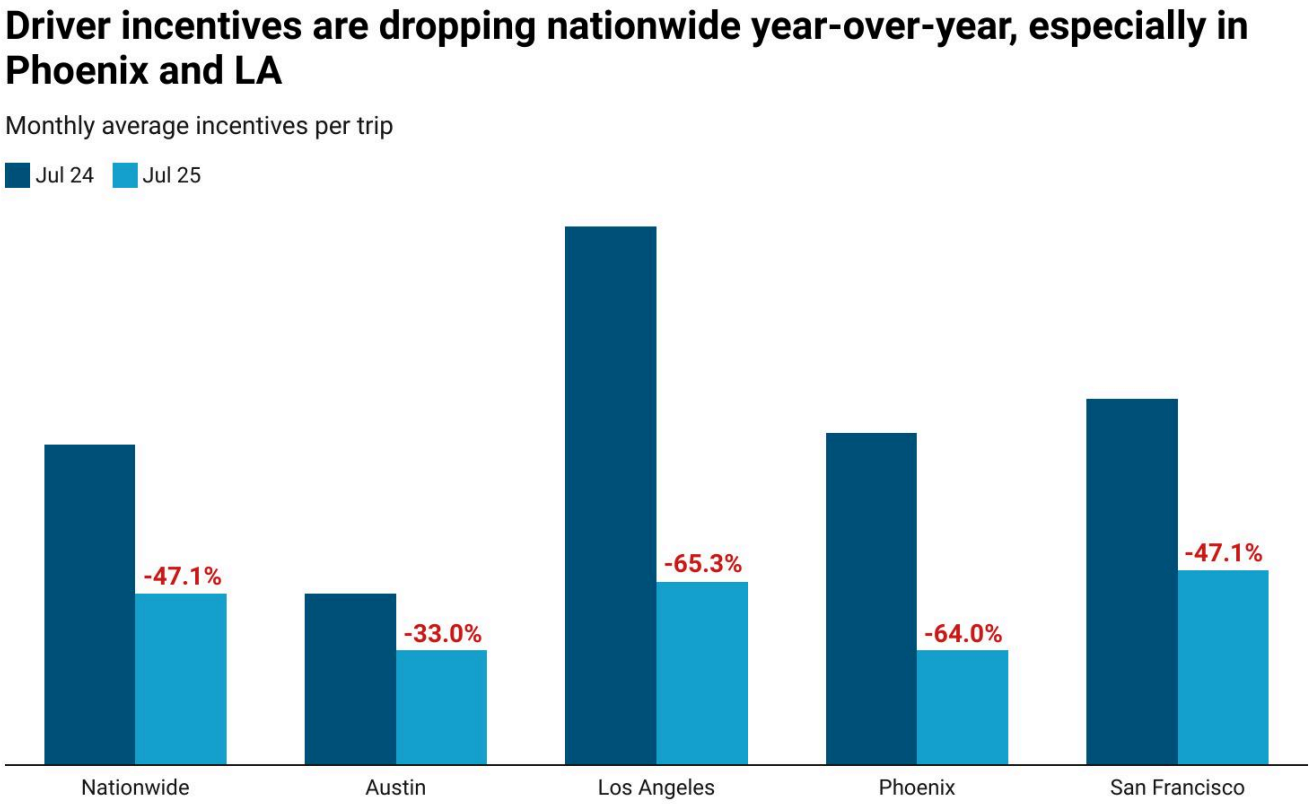
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: July 2024 & July 2025 | Geography: Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington • Created with Datawrapper

Incentive Pay Declined Nationwide, Not Just in AV Cities

Platform incentive pay has declined across the board YoY, but the reductions are significantly steeper in some AV-active cities. Incentives are multi-trip or non-trip pay components that are used to incentivise drivers, as opposed to trip specific bonuses which are recorded as bonus pay.

We see a YoY 47.1% decline in nationwide incentive spend per trip from July 2024 to July 2025. However, Los Angeles (–65.3%) was about 18% lower, and Phoenix (–64.0%) was about 17% lower than the national average.

Other AV cities followed a different pattern. San Francisco's decline (–47.1%) matches the national trend YoY, while Austin (–33.0%) saw a smaller decline in comparison, though still meaningful in the context of broader earnings losses seen across that market YoY. While there are declines in incentives in AV cities, the declines are a nationwide trend and likely not reflective of AV impact.



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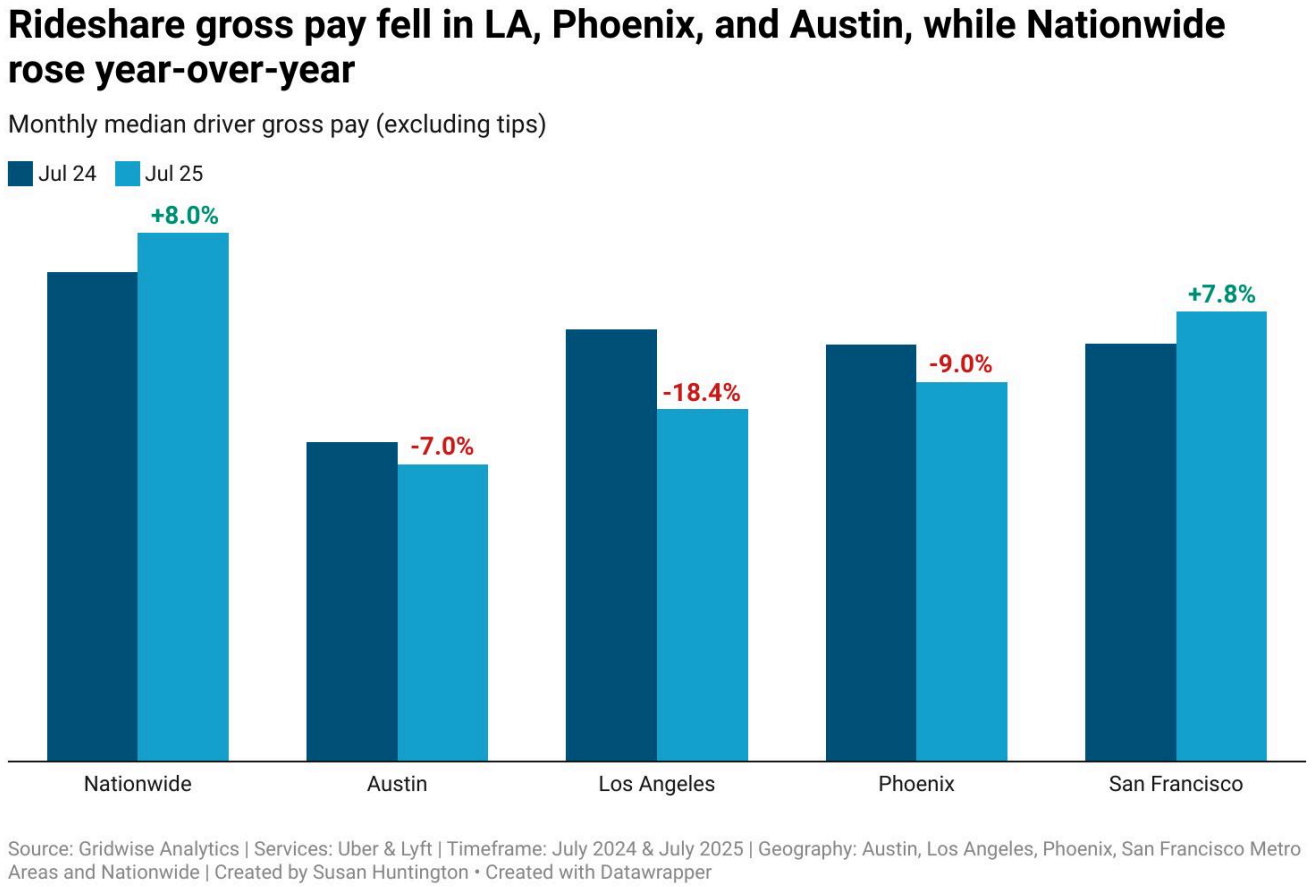
Monthly Earnings Dropped in Most AV Markets

Monthly gross pay, which captures all pay across all trips, has declined in several AV-active markets, even as national earnings rose.

From July 2024 to July 2025, Los Angeles (–18.4%), Phoenix (–9.0%), and Austin (–7.0%) show significant declines. In contrast, San Francisco (+7.8%) and the nationwide average (+8.0%) recorded increases.

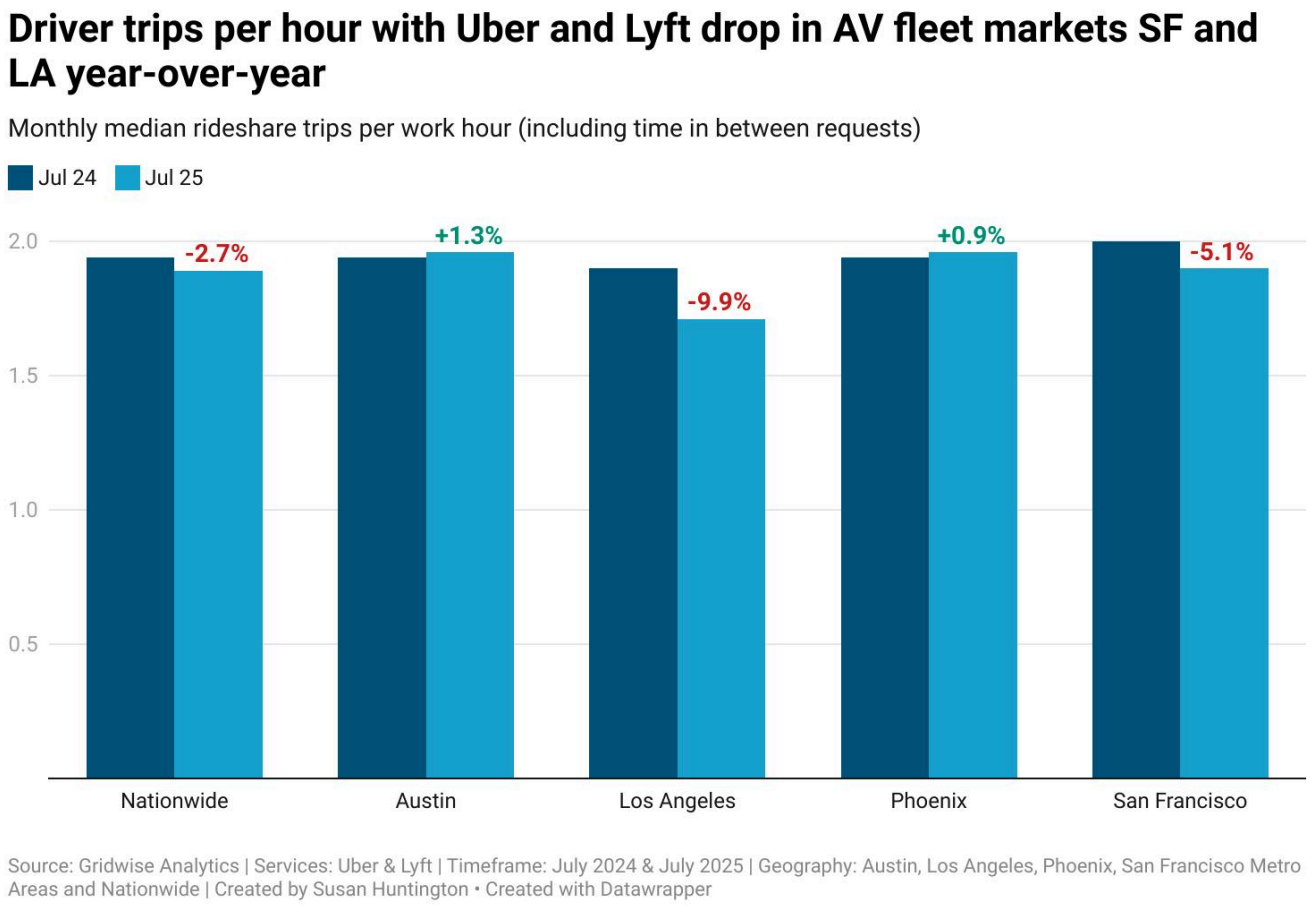
This pattern confirms that earnings pressure is not uniform across AV markets. While Los Angeles, Phoenix, and Austin experienced a substantial decline in monthly driver gross pay, San Francisco posted an increase in total earnings. However, declines in hourly pay and utilization suggest drivers in that market may be working more hours to maintain overall income.



Driver Trips Per Hour Dropped in Some AV Markets, While Others Saw Little Change

Driver trips per hour trends are mixed. Austin (+1.3%) and Phoenix (+0.9%) saw small year-over-year gains in trips per hour, while Los Angeles (–9.9%) and San Francisco (–5.1%) posted more pronounced declines YoY. Nationwide also saw a slight decrease of –2.7%.

In LA and San Francisco, the decline in trip volume helps explain some of the drop in hourly earnings. But in Austin and Phoenix, where trip volume held steady or increased while pay still fell, other factors appear to be at play—such as changes in ride type, ride length, or platform dynamics. These patterns point to a more nuanced picture of how driver income is being affected across different markets.

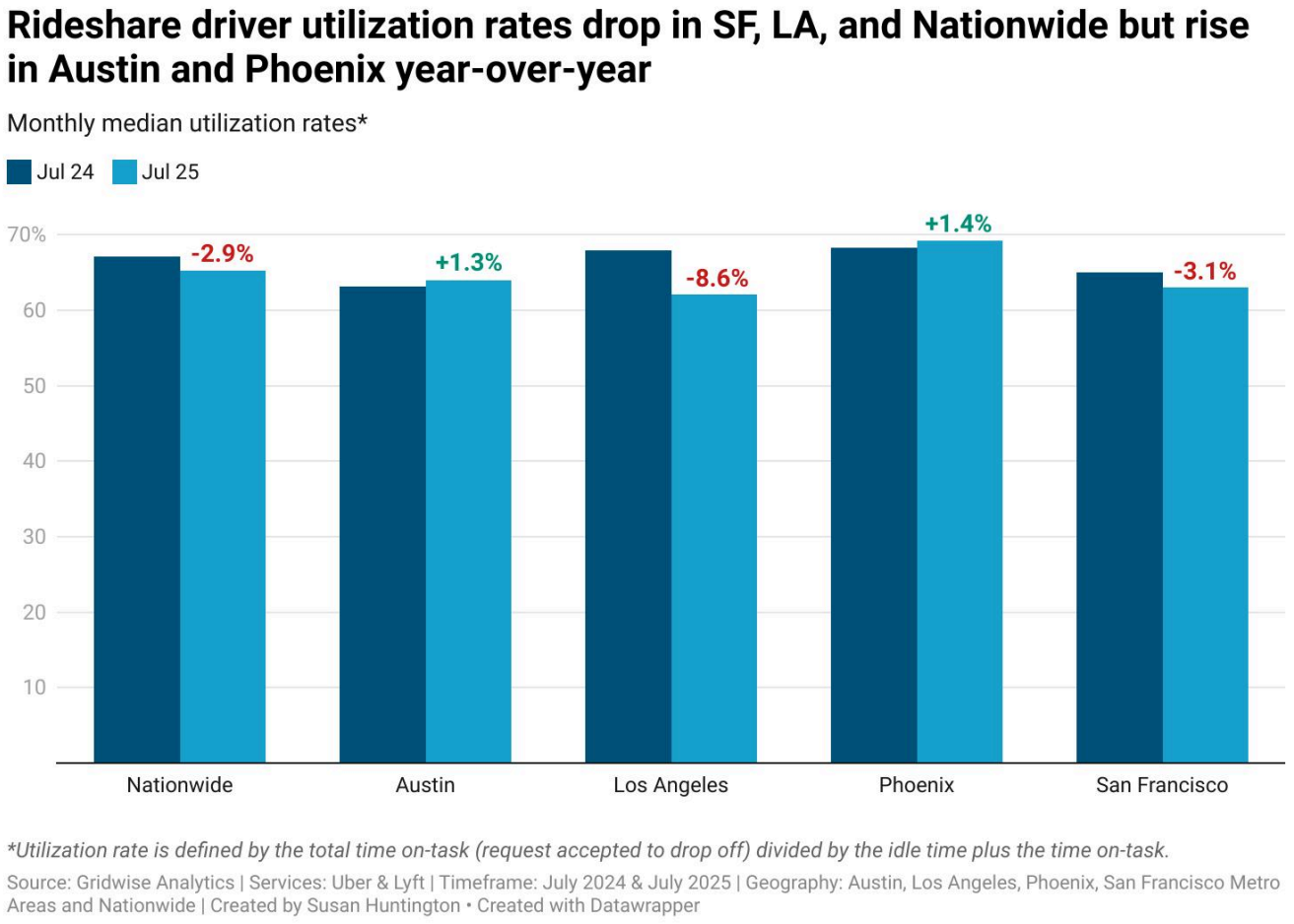


Utilization Rates Decreased in Certain AV Cities, While Remaining Consistent in Others

Driver utilization, the percentage of time spent on active trips, declined modestly nationwide, but more sharply in some AV markets.

Gridwise Analytics data shows that utilization decreased by –8.6% in Los Angeles and –3.1% in San Francisco year-over-year. Nationwide, the drop was –2.9%. Austin (+1.3%) and Phoenix (+1.4%) saw slight gains.

However, since Austin and Phoenix also posted declines in per-trip pay, overall earnings pressure is likely tied more to reduced compensation per ride than to utilization itself.



**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: July 2024 & July 2025 | Geography: Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington • Created with Datawrapper

City-Level Summary of Earnings Trends

While national driver earnings remained relatively stable over the past year, several AV-active markets experienced sharper declines across key metrics.

These variations suggest that city-level differences in rider demand, driver supply, incentive strategy, and trip volume, alongside potential early effects of AV deployment, are shaping outcomes in varied ways.

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

Percent difference between July 2024 and July 2025 in monthly median per metric cited in table

City	Per-Trip Gross Pay	Hourly Gross Pay	Gross Pay	Trips per Hour	Utilization
Nationwide	3.4%	1.0%	8.0%	−2.7%	−2.9%
Austin	−5.3%	−5.3%	−7.0%	1.3%	1.3%
Los Angeles	0.4%	−4.7%	−18.4%	−9.9%	−8.6%
Phoenix	−2.4%	−3.8%	−9.0%	0.9%	1.4%
San Francisco	−3.1%	−6.9%	7.8%	−5.1%	−3.1%

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

Conclusion: While autonomous vehicles are impacting driver earnings, the nature of the impact depends on the market.

Every AV-active city is showing pressure on driver earnings, but in different ways. Austin, Phoenix, and Los Angeles are seeing sharper drops in total income and incentives, while San Francisco stands apart—posting gains in total monthly earnings even as hourly pay and utilization declined.

Across markets, drivers are earning less per trip and per hour, pointing to a mix of fewer rides and lower-paying trips, which may reflect shifts in ride type, ride distance, or other local dynamics. In some cities, the result is a significant hit to overall earnings; in others, like San Francisco, drivers may be offsetting losses by working longer hours.

What is clear is that there is no single national trend. These changes are unfolding city by city, likely shaped by local conditions such as city-level differences in rider demand, driver supply, incentive strategy, and trip volume or potentially early effects of AV deployments. If you would like to understand the full scope of changes in each market, please reach out to Gridwise Analytics for detailed insights.

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

- **Platform Representation Bias:** While the Gridwise panel and dataset covers a substantial portion of the gig work market, it primarily reflects activity from Gridwise users. Consequently, platform market share estimates are based on the Gridwise panel and may be skewed toward platforms with higher Gridwise adoption. However, given the robust sample size and high correlation between our data and official platform-reported figures, we believe it provides a strong representation of broader market trends.
- **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 typically decline in June and July across most U.S. markets. These seasonal dips are consistent year to year, driven by a combination of lower customer demand during mid-summer and reduced incentive spending following promotional peaks earlier in the year. To control for these patterns, Gridwise Analytics uses year-over-year comparisons rather than month-over-month changes. This method removes seasonal bias and provides a clearer view of how AV-active markets are trending relative to prior performance.