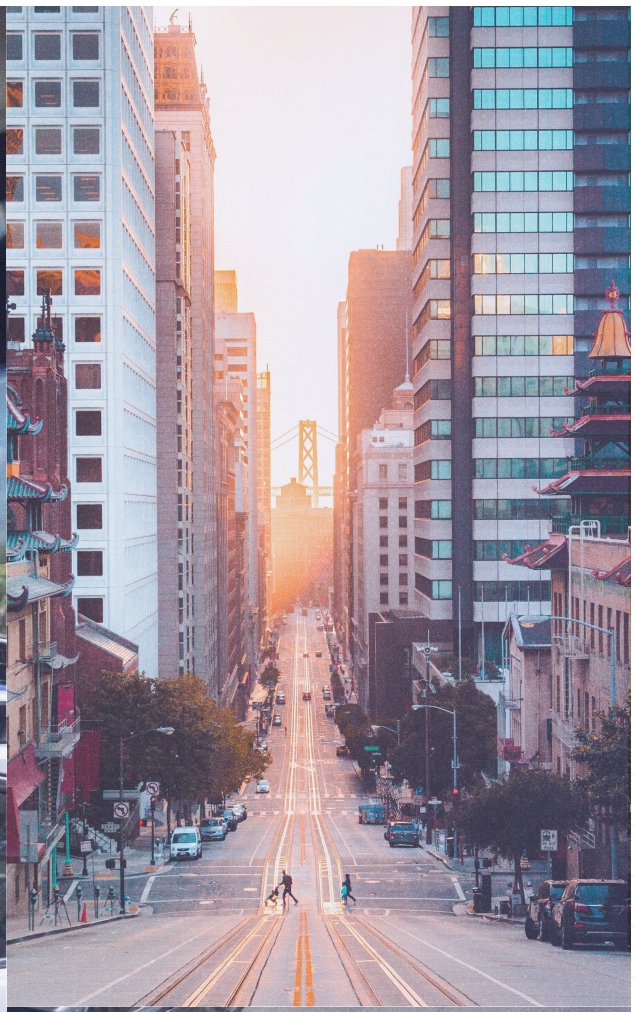
GRIDWISE ANALYTICS

Q2 2026 AUTONOMOUS VEHICLES IMPACT REPORT

How Rideshare Activity, Driver Pay, and Platform Fees Are Changing in AV Cities









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Key Findings

Comparison period: Q2 2024 to Q2 2026

01 **Platform fee rates decreased across all five AV cities.** Platform fee rates decreased in every AV city while increasing nationwide. Across the five AV cities combined, the median platform fee rate decreased 17.6% on a relative basis and median platform fees decreased 13.8%. Nationwide, the median fee rate increased 6.9% on a relative basis and median platform fees increased 19.2%.

02 **San Francisco provides the clearest example of how these shifts can look in a more established AV market.** Median platform fees decreased 47.1% and the median platform fee rate fell from 19.0% to 10.2%, while customer prices were unchanged. At the same time, hourly gross pay increased 3.3%, quarterly gross pay increased 16.1%, and work hours increased 10.4%. San Francisco does not establish what will happen in other AV markets, but it provides a useful reference point for how platform fees and driver earnings can change as AV services become more established.

03 **Austin shows some of the same changes, but with a different outcome for driver activity and total earnings.** Austin's platform fee rate decreased 18.4% on a relative basis, while gross pay per trip increased 10.3% and hourly gross pay increased 4.0%. At the same time, median work hours decreased 24.3% and quarterly gross pay decreased 17.7%. Some of the changes seen in San Francisco are present in Austin, but they are occurring alongside weaker driver activity and lower quarterly gross pay.

04 **Drivers generally completed fewer trips per hour.** Trips per hour decreased in four of the five AV cities and fell 3.1% across the five cities combined, compared with a 1.2% decrease nationwide. Phoenix was the exception, with trips per hour unchanged.

05 **Hourly gross pay increased even as trip frequency declined.** Median hourly gross pay excluding tips increased in all five AV cities. The decline in trips per hour therefore did not coincide with lower hourly earnings across these markets due to increased per-trip gross pay.

06 **Gross pay per trip (excluding tips) increased faster than base pay per trip in all five AV cities.** Base pay per trip increased in every city, but by less than gross pay per trip in each market. This points to a change in the composition of driver pay beyond base pay alone.

07 **Incentive pay decreased while bonus pay increased sharply across combined AV cities.** Average incentive pay per trip decreased 56.1%, while average bonus pay per trip increased 186.0%. Nationwide excluding AV cities, both increased, with bonus pay rising 41.4%.

The overall pattern is lower platform take, fewer trips per hour, higher hourly and per-trip gross pay, and a changing mix of driver pay. These findings suggest that the economics of human-operated rideshare may be changing in AV markets, both in how drivers are paid and in the share of customer prices retained by platforms.

Introduction

Autonomous ride-hail is expanding into more U.S. cities, with additional launches already announced for 2027. As autonomous vehicles become a larger part of the rideshare industry, there are questions about what this could mean for the drivers who currently rely on platforms such as Uber and Lyft for work.

Those questions come at a time when driver pay is already a major topic of discussion across the rideshare industry. Drivers in several states have pushed for higher pay and greater protections, while new pay standards and efforts to give drivers more say over pay and working conditions have increased attention on how much drivers earn and how their work is changing.

There is also broader concern about how AI and other new technologies could affect jobs. For rideshare drivers, autonomous vehicles make that question particularly direct: as autonomous ride-hail expands, what happens to the activity and earnings of human drivers?

This report uses anonymized Gridwise Analytics data to examine that question. It looks at driver activity, earnings, customer prices, and platform fees in Atlanta, Austin, Los Angeles, Phoenix, and San Francisco between Q2 2024 and Q2 2026, and compares those results with nationwide data excluding AV cities.

Scope and methodology

This report examines changes in human-operated rideshare activity in Atlanta, Austin, Los Angeles, Phoenix, and San Francisco, where autonomous ride-hail services are operating. The dataset included in this report covers Q1 2024 through Q2 2026. Most comparison figures and callouts focus on Q2 2024 and Q2 2026, providing a two-year comparison of changes in driver activity, pay, and trip characteristics. The previous report compared quarters one year apart.

The analysis uses anonymized, aggregated data from Uber and Lyft drivers who use the Gridwise app in these five metro areas, including trip prices, platform fees, work hours, and earnings. Each city is compared with nationwide results excluding AV cities. The nationwide comparison also excludes six additional metro areas where public AV ride-hail service began more recently. These markets are excluded from the national comparison but are not analyzed individually because their AV presence is more recent.

Gross pay excludes tips, which are reported separately. Percentage changes are based on the change from Q2 2024 to Q2 2026 and are not annual growth rates. Autonomous trips are excluded from the driver analysis. The report describes measurable changes in these markets but cannot isolate the effect of AV deployment from other market factors.

Active Autonomous Ride-Hail Markets

As of September 30, 2026, the U.S. had 27 AV ride-hail services offering some form of public access across 15 metro markets. Service models range from paid driverless operations to supervised or phased public access, and several markets now have more than one AV operator.

The table below shows each market, operator, public service milestone, current service status, and the latest available vehicle count.

Active U.S. Public AV Ride-Hail Markets

City / Market	Operator	Public Service Milestone	Current Service Status	AV Vehicles
Atlanta, GA	Waymo via Uber	Jun. 24, 2025	Paid, driverless	>200
	May Mobility via Lyft	Sep. 10, 2025	Paid, supervised	Not reported
Austin, TX	Waymo via Uber	Mar. 4, 2025	Paid, driverless	>300
	Tesla Robotaxi	Jun. 22, 2025	Paid, expanding unsupervised service	211
Dallas, TX	Avride via Uber	Dec. 3, 2025	Paid, supervised	Not reported
	Waymo	Feb. 24, 2026	Paid, driverless	100
	Tesla Robotaxi	Apr. 18, 2026	Paid, expanding unsupervised service	59
Denver, CO	Waymo	Sep. 1, 2026	Paid, phased driverless access	Not reported
Houston, TX	Waymo	Feb. 24, 2026	Paid, driverless	>50
	Tesla Robotaxi	Apr. 18, 2026	Paid, expanding unsupervised service	32
Las Vegas, NV	Zoox	Sep. 10, 2025	Paid, driverless	30+
	Motional via Uber	Mar. 13, 2026	Paid, supervised	Not reported
	Waymo	Sep. 14, 2026	Paid, phased driverless access	Not reported
Los Angeles, CA	Waymo	Nov. 12, 2024	Paid, driverless	>900
Miami, FL	Waymo	Jan. 22, 2026	Paid, driverless	>200
	Tesla Robotaxi	Jul. 3, 2026	Paid, expanding unsupervised service	4

Continued on next page

Active U.S. Public AV Ride-Hail Markets (continued)

City / Market	Operator	Public Service Milestone	Current Service Status	AV Vehicles
Nashville, TN	Waymo / Lyft	Apr. 7, 2026	Paid, driverless	>100
Orlando, FL	Waymo	Feb. 24, 2026	Paid, driverless	>50
	Tesla Robotaxi	Jul. 21, 2026	Paid, expanding unsupervised service	3
Phoenix Metro, AZ	Waymo	Oct. 8, 2020	Paid, driverless	>500
San Antonio, TX	Waymo	Feb. 24, 2026	Paid, driverless, limited relaunch	Not reported
San Diego, CA	Waymo	Sep. 1, 2026	Paid, phased driverless access	Not reported
San Francisco Bay Area, CA	Waymo	Jun. 25, 2024	Paid, driverless	>1,200
San Francisco, CA	Zoox	Nov. 18, 2025	Free, public early-access program	Not reported
San Francisco Bay Area, CA	Tesla ride-hail	Jul. 31, 2025	Paid, supervised	701
Tampa, FL	Tesla Robotaxi	Jul. 21, 2026	Paid, expanding unsupervised service	16
	Waymo	Sep. 1, 2026	Paid, phased driverless access	Not reported

Note: Market status is current as of September 30, 2026. Public service milestones may reflect initial public access, the start of paid service, or the removal of access restrictions. Service areas and operating conditions vary by market. Vehicle counts are from Robotaxi Tracker as of October 1, 2026. Where available, counts reflect fleet sizes reported by operators. Other counts reflect vehicles recently observed in service and should be treated as lower bounds rather than full fleet estimates. Counts are not reported where public access is restricted by a waitlist or where Robotaxi Tracker does not track the operator. For the market count above, San Francisco and the broader Bay Area are treated as one metro market.

Upcoming Autonomous Ride-Hail Markets

AV ride-hail expansion is expected to continue through 2027 and beyond. Operators are testing in new markets and have announced additional U.S. launches, including in some markets that already have AV services from other companies. The table below summarizes announced deployments that had not yet reached broad public commercial service as of September 30, 2026.

Launch timing remains subject to operational readiness, regulatory approval, and changes to operator deployment plans.

Upcoming U.S. AV Ride-Hail Markets

City / Market	Operator	Announced Launch Window / Status
Arlington, TX	May Mobility via Uber	Q4 2026 or Q1 2027
Austin, TX	Zoox	Testing / pre-launch; public launch timing not announced
Dallas, TX	Mobileye-powered AVs via Lyft	Advanced testing; launch date not yet announced
Detroit, MI	Waymo	Up Next; launch timing not announced
Houston, TX	Lucid Gravity + Nuro Driver via Uber	Mid-2027
Los Angeles, CA	MOIA America via Uber	Rides planned for late 2026
Los Angeles, CA	Zoox via Uber	Mid-2027
Los Angeles, CA	NVIDIA full-stack AVs via Uber	First half of 2027
Miami, FL	Zoox	Testing / pre-launch; public launch timing not announced
Miami, FL	Rivian R2 robotaxis via Uber	2028
San Francisco Bay Area, CA	Lucid Gravity + Nuro Driver via Uber	Late 2026
San Francisco Bay Area, CA	NVIDIA full-stack AVs via Uber	First half of 2027
San Francisco, CA	Rivian R2 robotaxis via Uber	2027 and 2028 plans
Washington, DC	Waymo	Up Next; launch timing not announced

Note: Launch timing and market status are current as of September 30, 2026, and may change.

How AV Cities Compare With Nationwide

This section highlights the largest differences between the five AV cities combined and nationwide excluding AV cities from Q2 2024 to Q2 2026.

Platform fees showed one of the biggest differences between AV cities and nationwide. In the five AV cities combined, both platform fee rates and the amount collected in platform fees decreased, while both increased nationwide. By Q2 2026, platforms were taking a smaller share of the customer price in AV cities than in Q2 2024.

Driver activity also decreased in AV cities, with fewer trips completed per hour. Even so, hourly gross pay increased in both AV cities and nationwide. Utilization also remained higher in combined AV cities than nationwide.

The mix of pay components also changed over the period. Non-trip incentive pay decreased in AV cities while bonus pay increased substantially, whereas both increased nationwide. This shows that changes in driver pay were not limited to overall earnings, but also affected the mix of pay components.

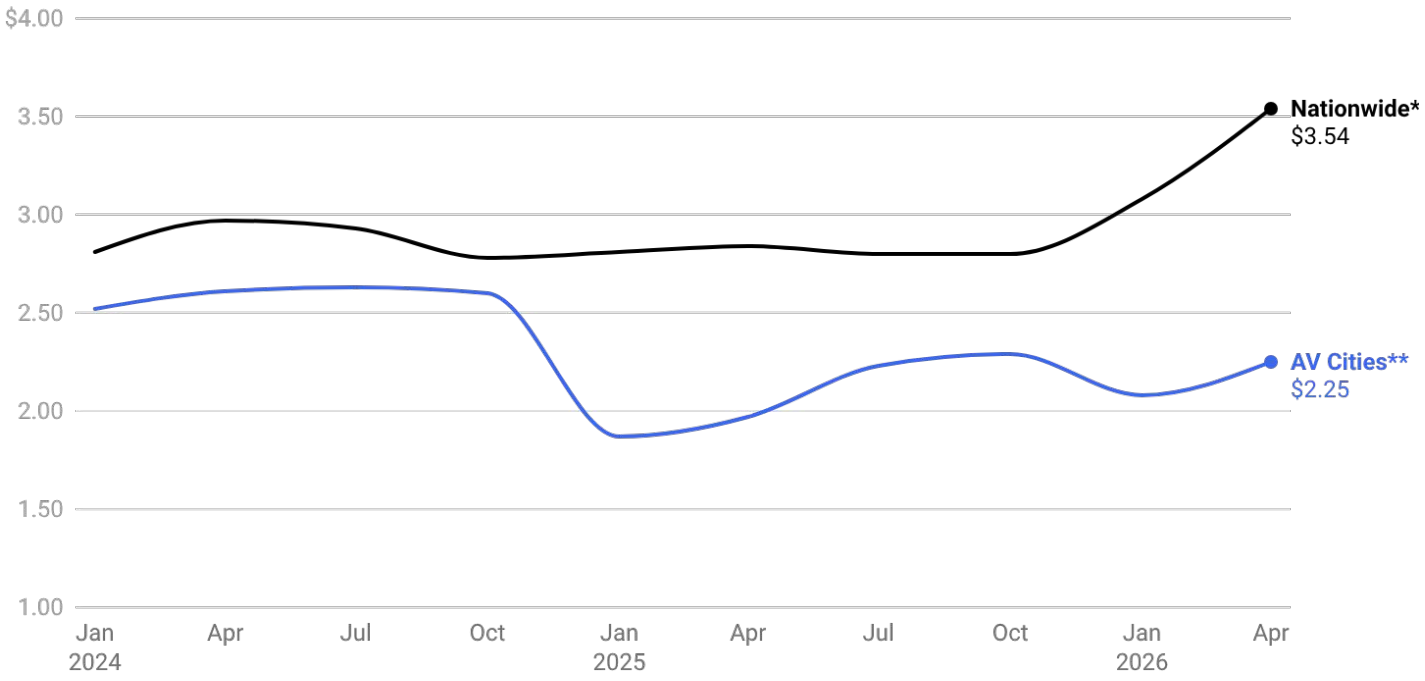
Platform Fees: Decreased in AV Cities and Increased Nationwide

From Q2 2024 to Q2 2026, median platform fees decreased 13.8% in the five AV cities combined, from $2.61 to $2.25. Nationwide excluding AV cities, fees increased 19.2%, from $2.97 to $3.54.

In Q2 2024, median platform fees in combined AV cities were $0.36 lower than nationwide excluding AV cities. In Q2 2026, the gap widened: median platform fees in combined AV cities were $1.29 lower per trip than nationwide excluding AV cities.

Platform fees decreased in AV cities and increased nationwide

Quarterly median platform fee for rideshare trips Nationwide vs AV cities



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco. **AV Cities includes the 5 cities with the most AV presence: Atlanta, Austin, Los Angeles, Phoenix, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide* and AV Cities** • Created with Datawrapper

Gridwise's platform fee is the amount shown on the trip statement as retained by the platform after driver payments and third-party fees. It differs from Uber and Lyft's reported revenue, which covers broader activities and reflects company accounting policies.

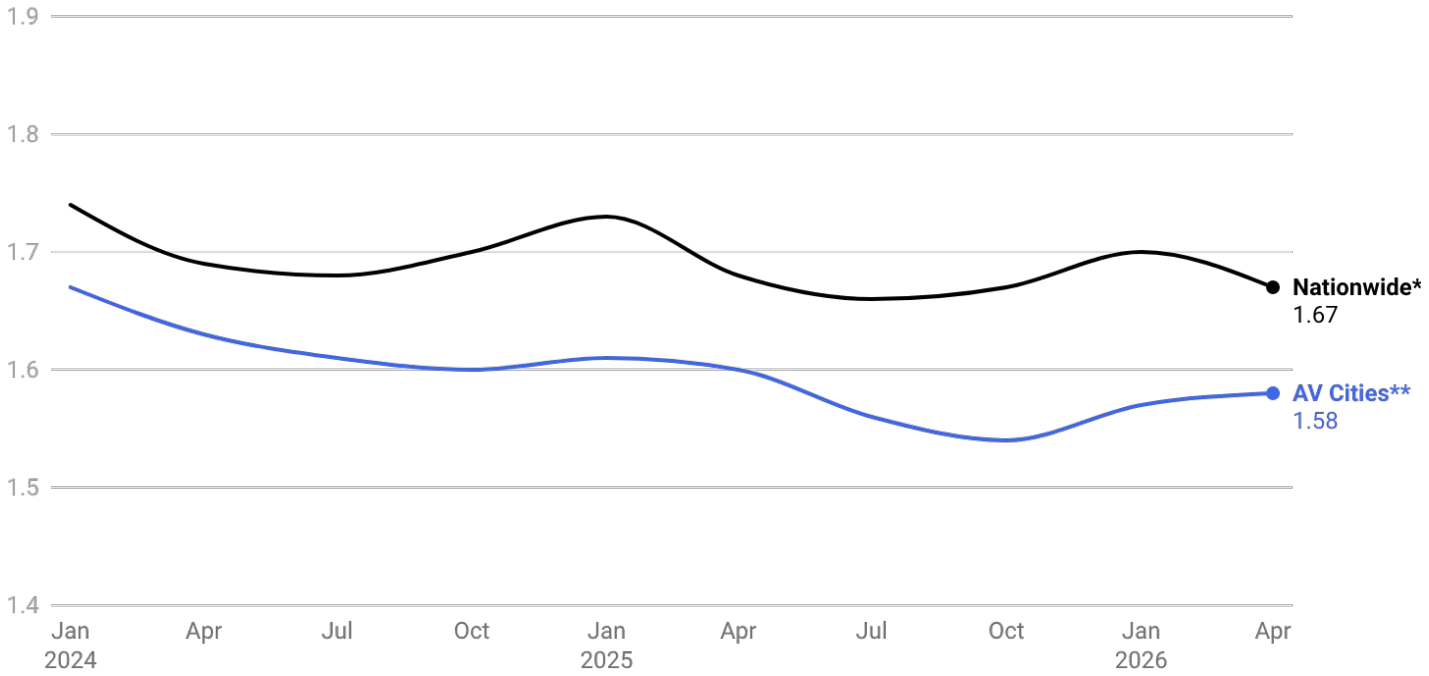
Trips per Hour: Decreased More in AV Cities Than Nationwide

From Q2 2024 to Q2 2026, median trips per work hour decreased 3.1% in combined AV cities, from 1.63 to 1.58. Nationwide excluding AV cities, trips per hour decreased 1.2%, from 1.69 to 1.67.

In Q2 2026, combined AV cities had 0.09 fewer trips per work hour than nationwide excluding AV cities, compared with 0.06 fewer in Q2 2024. Trips per hour decreased more than the national comparison in four of the five AV cities and did not change in Phoenix.

Trips per hour decreased more in AV cities than nationwide

Quarterly median trips per hour for rideshare drivers Nationwide vs AV cities



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco. **AV Cities includes the 5 cities with the most AV presence: Atlanta, Austin, Los Angeles, Phoenix, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide* and AV Cities** • Created with Datawrapper

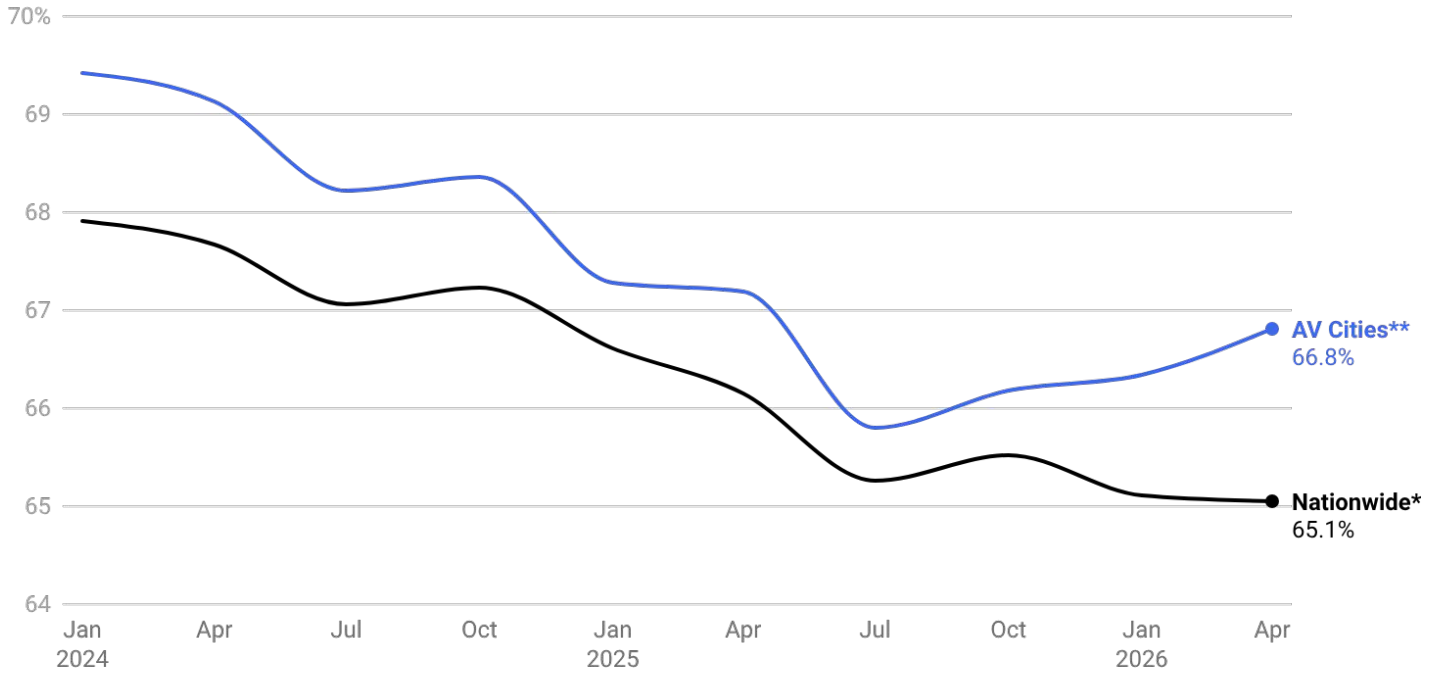
Driver Utilization: Decreased Slightly Less in AV Cities Than Nationwide

From Q2 2024 to Q2 2026, median driver utilization decreased 2.3 percentage points in combined AV cities, from 69.1% to 66.8%. Nationwide excluding AV cities, utilization decreased 2.6 percentage points, from 67.7% to 65.1%.

Utilization was higher in combined AV cities in both comparison quarters. After reaching a low in Q3 2025, utilization in AV cities increased through Q2 2026. By Q2 2026, the gap with nationwide excluding AV cities had widened to 1.7 percentage points, from 1.4 percentage points in Q2 2024.

Utilization decreased slightly less in AV cities than nationwide and the difference is increasing

Quarterly median utilization rate*** for rideshare drivers Nationwide vs AV cities



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco. **AV Cities includes the 5 cities with the most AV presence: Atlanta, Austin, Los Angeles, Phoenix, San Francisco. ***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: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide* and AV Cities** • Created with Datawrapper

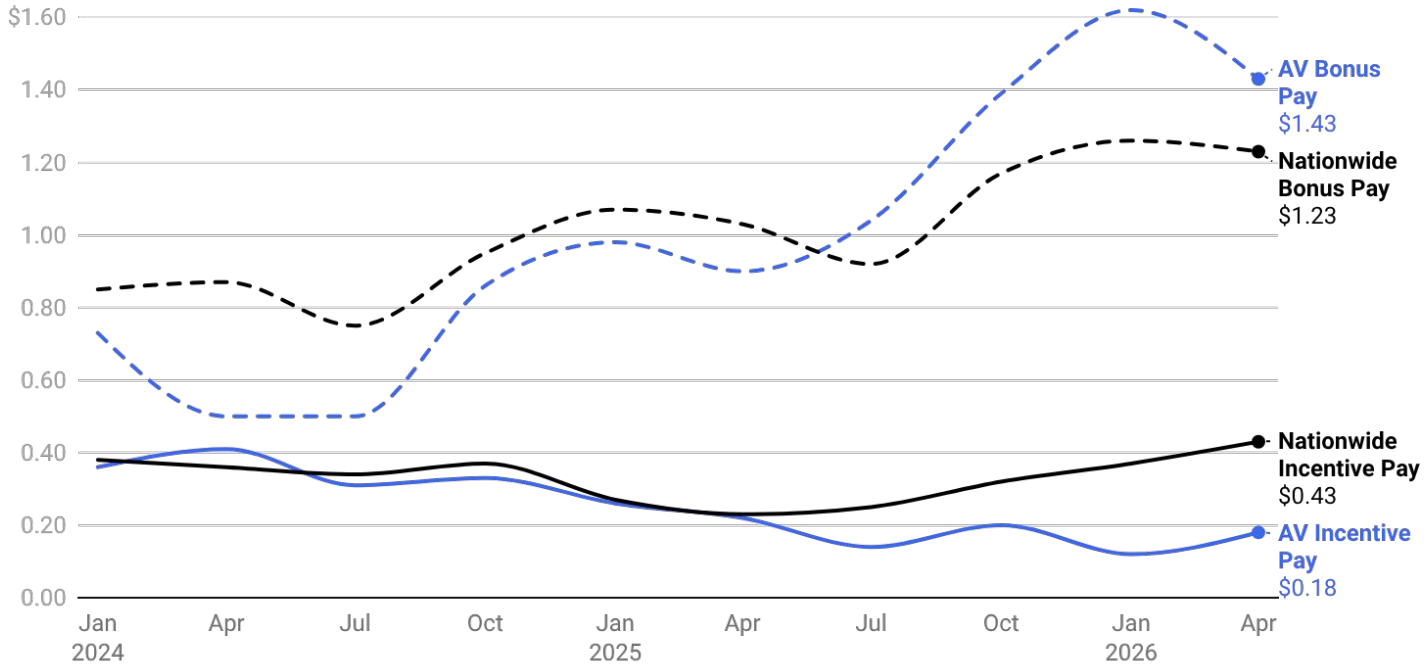
Incentive and Bonus Pay per Trip: Incentive and Bonus Pay per Trip: In AV Cities, Incentives Fell While Bonuses Rose More Than Nationwide

From Q2 2024 to Q2 2026, across combined AV cities, average incentive pay per trip decreased 56.1%, from $0.41 to $0.18. Average bonus pay per trip increased 186.0%, from $0.50 to $1.43 in AV cities, a much larger increase than nationwide.

Nationwide excluding AV cities, average incentive pay per trip increased 19.4%, from $0.36 to $0.43. Average bonus pay per trip increased 41.4%, from $0.87 to $1.23.

Incentives fell in AV cities while bonuses rose everywhere

Quarterly average incentive and bonus pay per rideshare trip Nationwide* vs AV cities**



*Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco. **AV Cities includes the 5 cities with the most AV presence: Atlanta, Austin, Los Angeles, Phoenix, San Francisco.

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide* and AV Cities** • Created with Datawrapper

A Closer Look at the Five AV Cities

From Q2 2024 to Q2 2026, the five AV cities showed several common patterns, but the size and direction of changes varied by market. Platform fee rates decreased in every city, while gross pay per trip and hourly gross pay increased in all five. Driver activity generally declined, with trips per hour decreasing in four cities and utilization decreasing in all five. Quarterly gross pay was more mixed, increasing in Phoenix, Atlanta, and San Francisco and decreasing in Austin and Los Angeles. The sections below look at these differences across platform fees and customer prices, driver activity, driver pay, and ride type and distance.

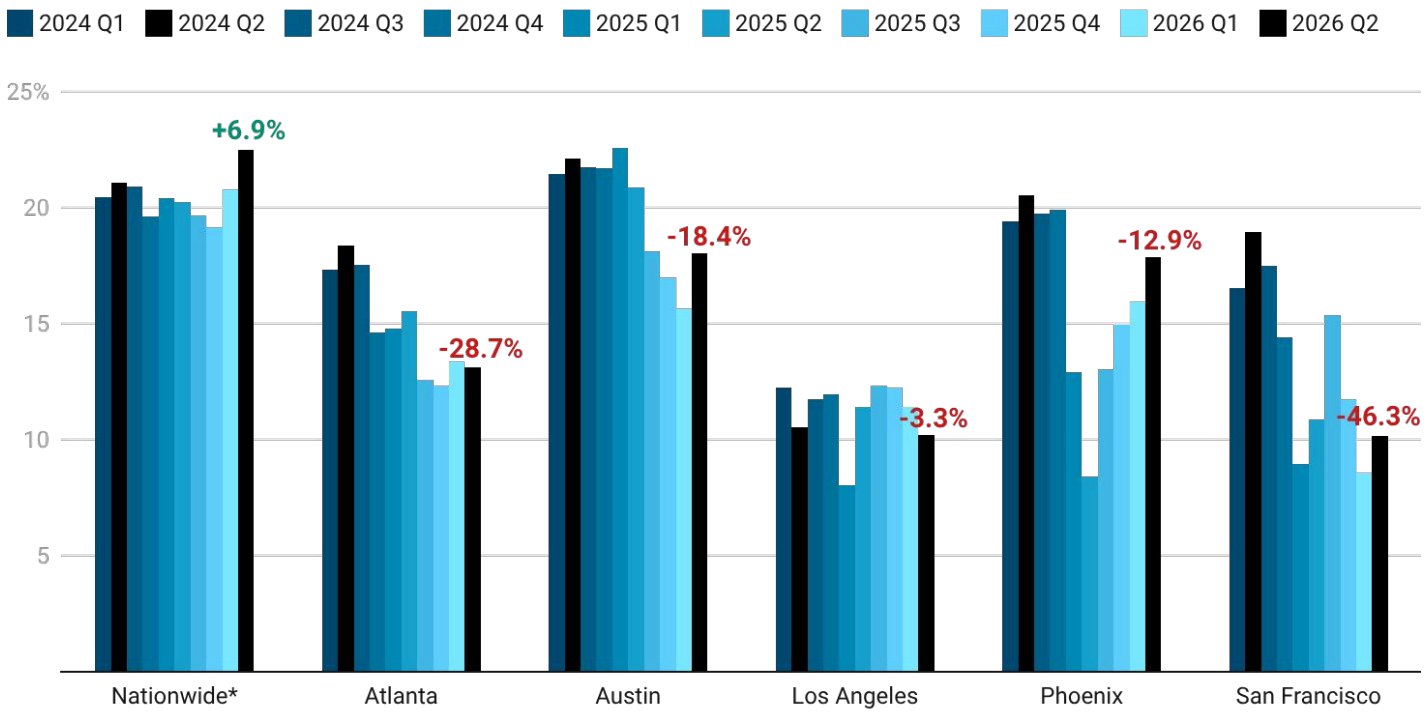
Platform Fee Rates: Decreased in All Five AV Cities and Increased Nationwide

From Q2 2024 to Q2 2026, median platform fee rates decreased in all five AV cities. San Francisco had the largest relative decrease at 46.3%. Atlanta decreased 28.7%, Austin 18.4%, Phoenix 12.9%, and Los Angeles 3.3%. Nationwide excluding AV cities, the median platform fee rate increased 6.9% on a relative basis.

Platform fee rates differed notably between the AV cities and nationwide. The rate decreased across all five AV cities, while the nationwide rate increased. The decreases were particularly pronounced in San Francisco and Atlanta, where platform fee rates fell by more than a quarter.

Platform fee rates decreased in every AV city while increasing nationwide

Quarterly median platform fee rate** for rideshare trips, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco. **Platform fee rate is defined by the per-trip platform fee divided by the per-trip customer price (excluding tip).*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

Gridwise's platform fee rate is calculated for each observed ride by dividing the platform fee by the customer price, excluding tips. It reflects rides observed within the Gridwise panel and is not equivalent to Uber or Lyft's reported take rate, revenue margin, profit margin, or Adjusted EBITDA margin.

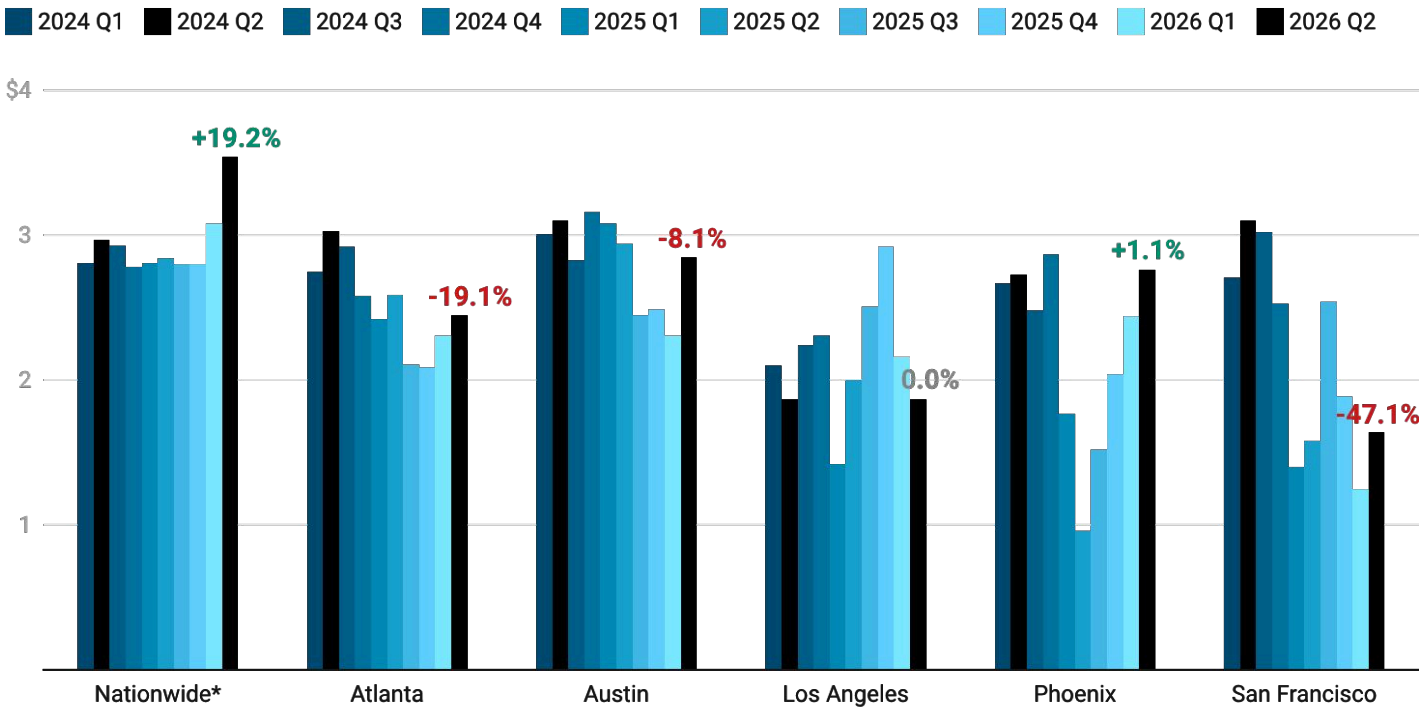
Platform Fees: Decreased in Three AV Cities and Increased Nationwide

From Q2 2024 to Q2 2026, median platform fees decreased in San Francisco, Atlanta, and Austin. San Francisco had the largest decrease, down 47.1% from $3.10 to $1.64. Atlanta decreased 19.1%, and Austin decreased 8.1%.

Median platform fees were unchanged at $1.87 in Los Angeles and increased 1.1% in Phoenix. Nationwide excluding AV cities, median platform fees increased 19.2%, from $2.97 to $3.54.

Platform fees rose nearly 20% nationwide, while three AV cities saw decreases

Quarterly median platform fee for rideshare trips, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

Gridwise's platform fee is the amount shown on the trip statement as retained by the platform after driver payments and third-party fees. It differs from Uber and Lyft's reported revenue, which covers broader activities and reflects company accounting policies.

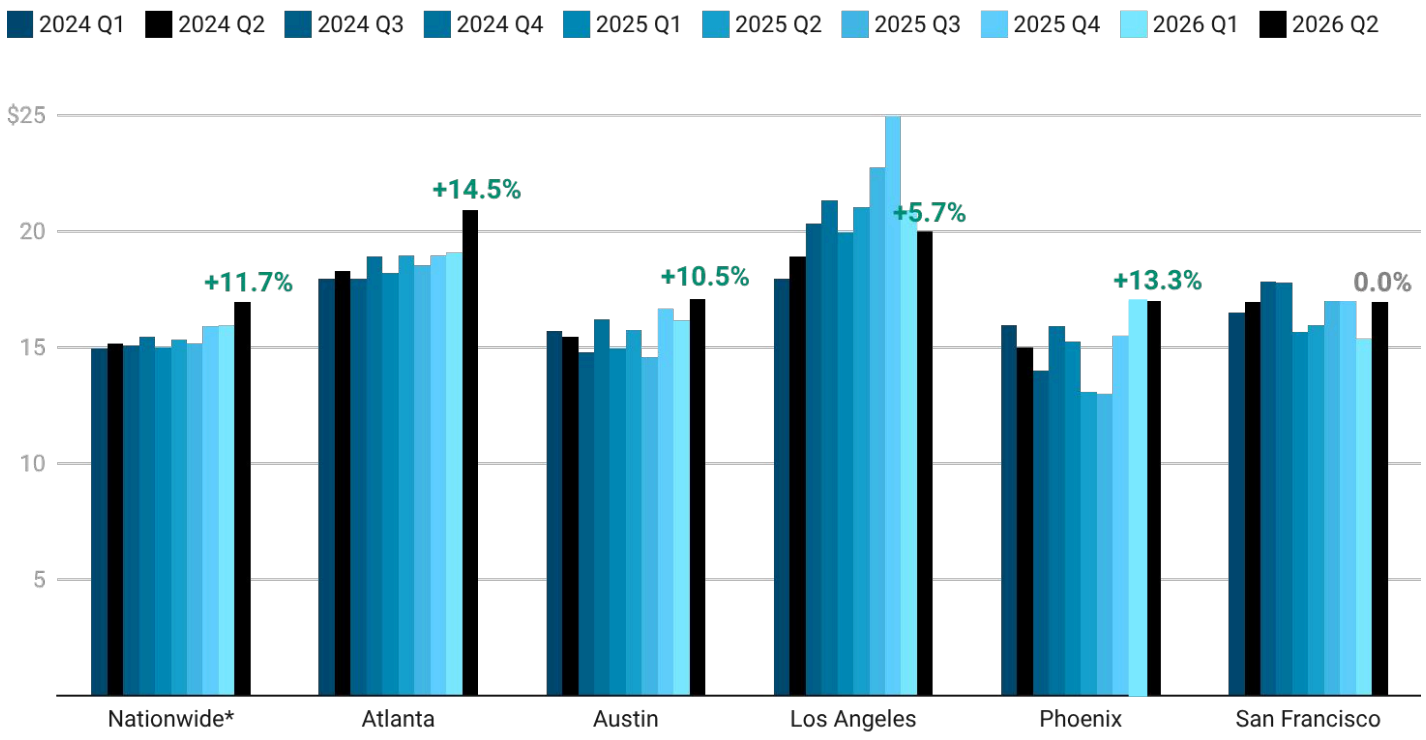
Customer Prices: Increased in Four AV Cities and Did Not Change in San Francisco

From Q2 2024 to Q2 2026, median customer prices increased in Atlanta, Phoenix, Austin, and Los Angeles, while remaining unchanged in San Francisco. Atlanta had the largest increase at 14.5%, followed by Phoenix at 13.3%. Austin increased 10.5%, and Los Angeles increased 5.7%. Nationwide excluding AV cities, median customer prices increased 11.7%.

In San Francisco, premium rides made up a larger share of trips over the same period, while median trip distance remained roughly flat. Prices fell for shorter Standard and Premium rides, with a larger decline for Premium rides, while prices increased for the less common trips of 9 miles or more. These shifts may help explain why the overall median customer price remained unchanged.

Customer prices rose everywhere except San Francisco

Quarterly median customer price for rideshare trips, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

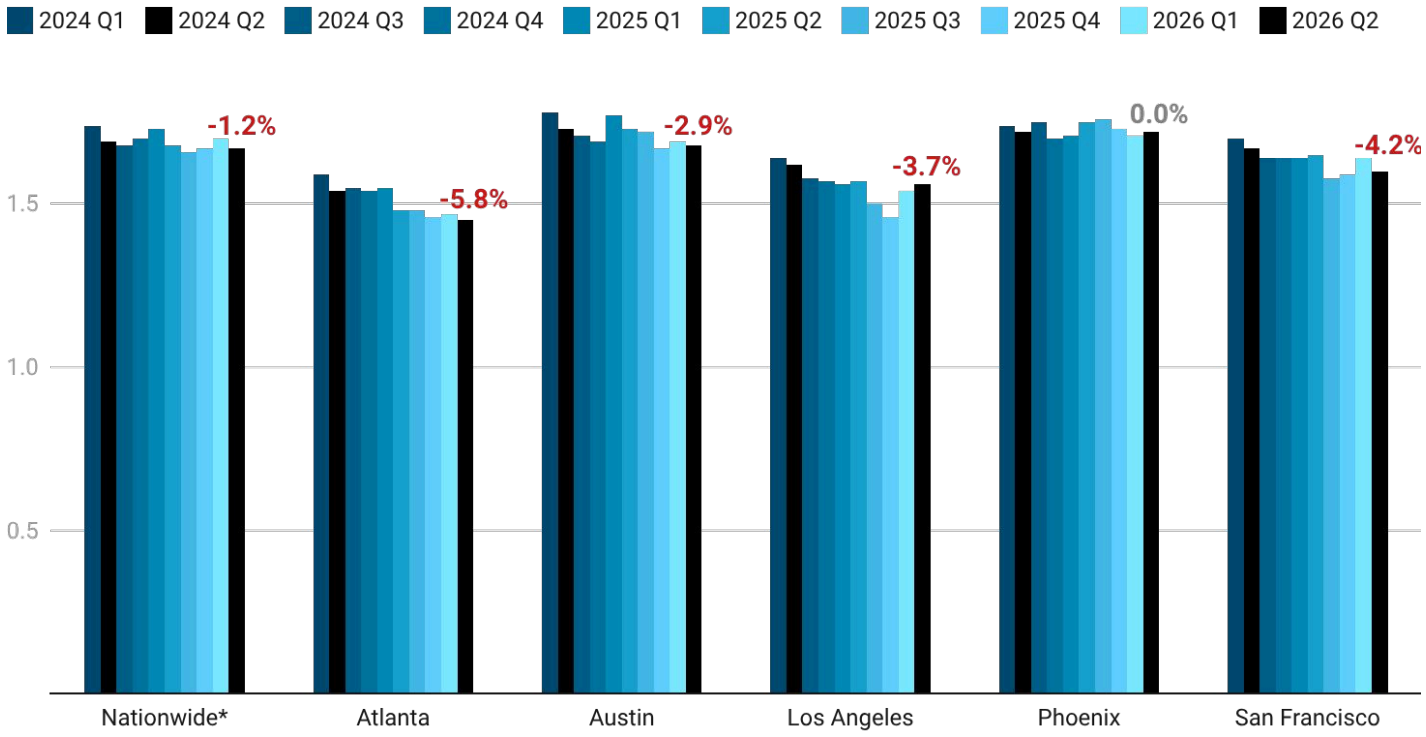
Trips per Hour: Decreased More Than Nationwide in Four AV Cities

From Q2 2024 to Q2 2026, trips per hour decreased in Atlanta, San Francisco, Los Angeles, and Austin. In each of these cities, the percentage decrease was larger than nationwide excluding AV cities.

Atlanta had the largest decrease at 5.8%, from 1.54 to 1.45 trips per hour. San Francisco decreased 4.2%, Los Angeles 3.7%, and Austin 2.9%. The decrease was less than 0.1 trip per hour in each of the four cities. Nationwide excluding AV cities, trips per hour decreased 1.2%, from 1.69 to 1.67. Phoenix was an outlier, with trips per hour unchanged at 1.72.

Trips per hour decreased most in Atlanta and San Francisco

Quarterly median trips per hour for rideshare drivers, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

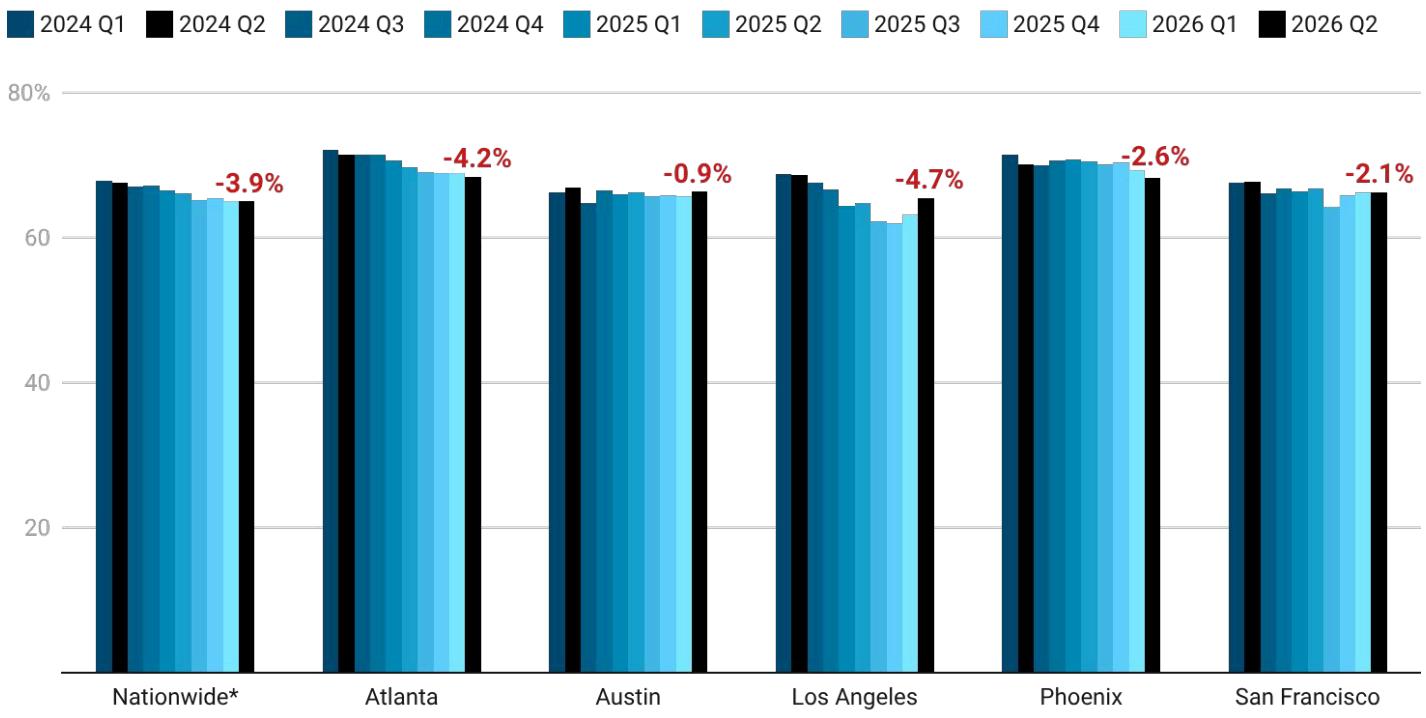
Utilization: Decreased in All Five AV Cities and Nationwide

From Q2 2024 to Q2 2026, driver utilization decreased in all five AV cities and nationwide excluding AV cities. Los Angeles had the largest relative decrease at 4.7%, followed by Atlanta at 4.2%. Nationwide excluding AV cities, utilization decreased 3.9% on a relative basis.

On a relative basis, utilization decreased 2.6% in Phoenix, 2.1% in San Francisco, and 0.9% in Austin. Utilization remained higher than the nationwide figure in all five AV cities in Q2 2026.

Utilization decreased in all five AV cities and nationwide

Quarterly median utilization rate** for rideshare drivers, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco. **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.*

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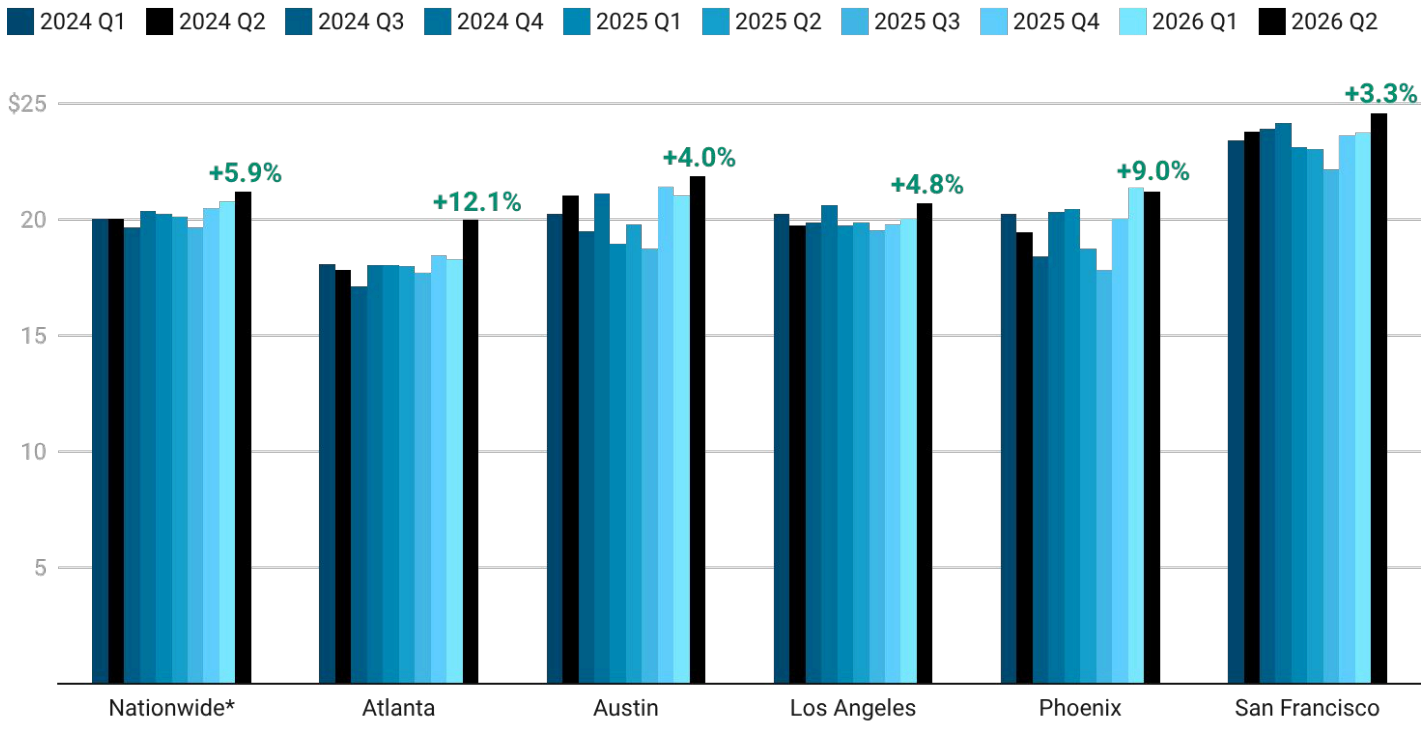
Hourly Gross Pay: Increased in All Five AV Cities

From Q2 2024 to Q2 2026, hourly gross pay excluding tips increased in all five AV cities. Atlanta increased 12.1% and Phoenix 9.0%, both higher than the 5.9% increase nationwide excluding AV cities. Los Angeles increased 4.8%, Austin 4.0%, and San Francisco 3.3%, all lower than the nationwide increase.

In Q2 2026, San Francisco had the highest hourly gross pay among the five AV cities at $24.60. Austin was also above the nationwide median of $21.24, while Phoenix matched it. Los Angeles was below nationwide at $20.71, and Atlanta was lowest at $20.01.

Hourly gross pay increased in all AV cities, but less than nationwide in Austin, Los Angeles, and San Francisco

Quarterly median gross pay per work hour (excluding tips) for rideshare drivers, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

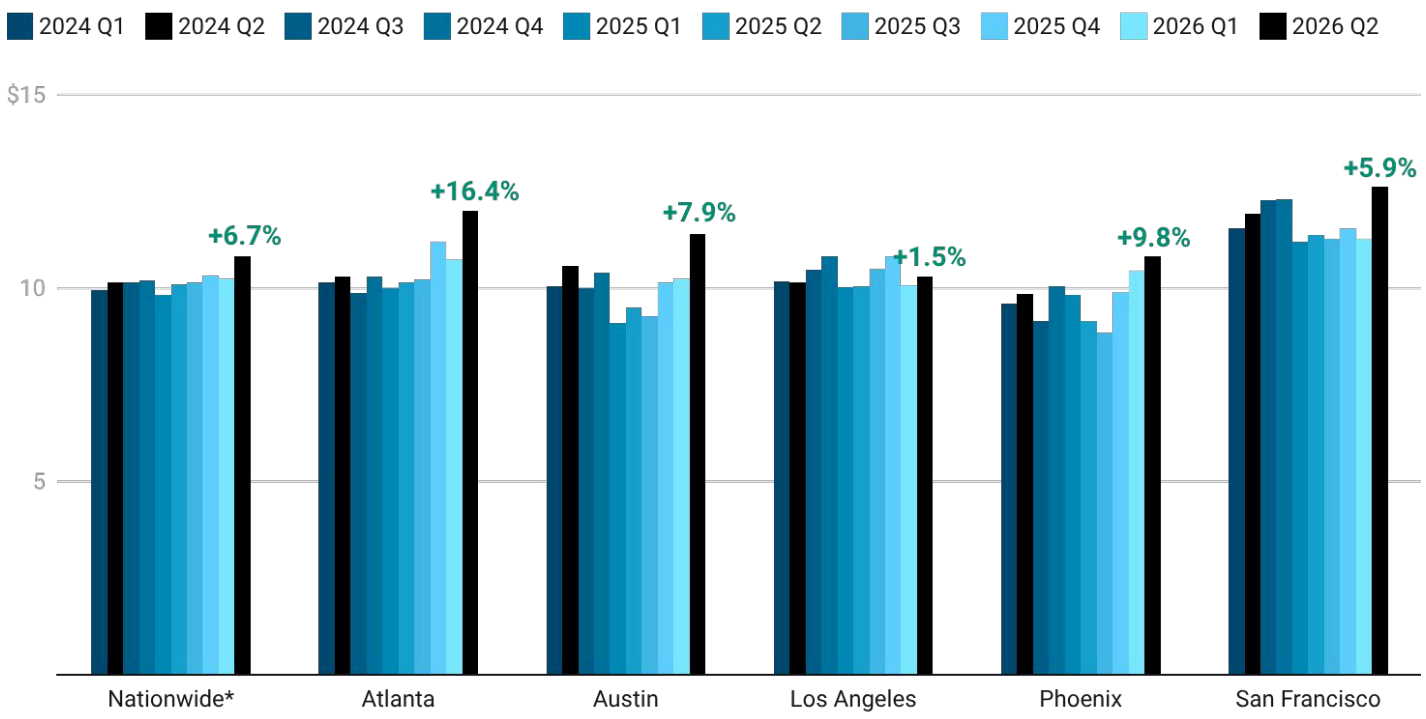
Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

Base Pay per Trip: Increased in All Five AV Cities

From Q2 2024 to Q2 2026, median base pay per trip increased in all five AV cities. Atlanta had the largest increase at 16.4%, from $10.30 to $11.99. Phoenix increased 9.8%, Austin 7.9%, and San Francisco 5.9%, while Los Angeles had the smallest increase at 1.5%, from $10.16 to $10.31. Nationwide excluding AV cities, median base pay per trip increased 6.7%, from $10.15 to $10.83.

Base pay per trip increased most in Atlanta

Quarterly median base pay per trip for rideshare drivers, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

Per-Trip Gross Pay: Increased in All Five AV Cities

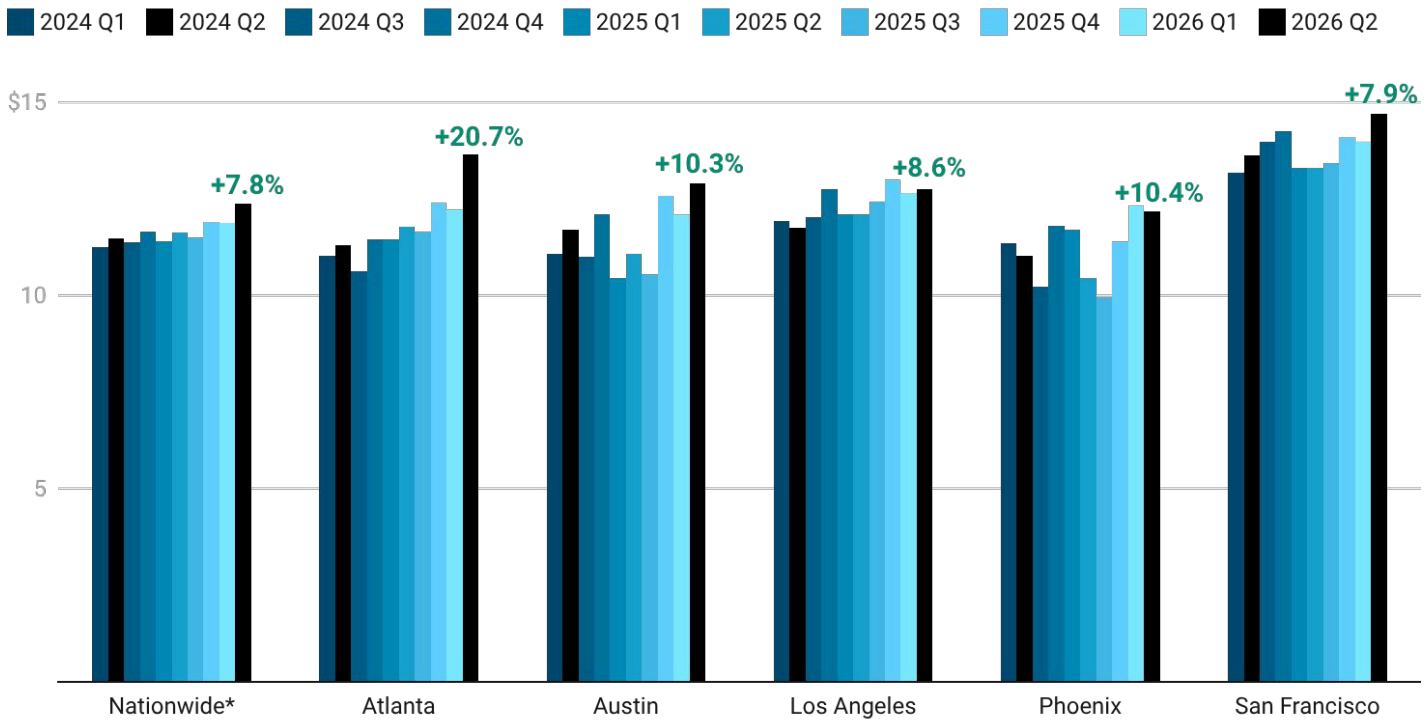
From Q2 2024 to Q2 2026, gross pay per trip excluding tips increased in all five AV cities. Atlanta had the largest increase at 20.7%, from $11.32 to $13.66. Nationwide excluding AV cities, gross pay per trip increased 7.8%.

Phoenix increased 10.4%, Austin 10.3%, Los Angeles 8.6%, and San Francisco 7.9%. The percentage increase was larger than the nationwide increase in all five AV cities.

In Q2 2026, however, Phoenix was the only AV city with gross pay per trip below the nationwide level, at $12.19 compared with $12.39 nationwide.

Gross pay per trip increased more in all five AV cities than nationwide

Quarterly median gross pay per trip (excluding tips) for rideshare drivers, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

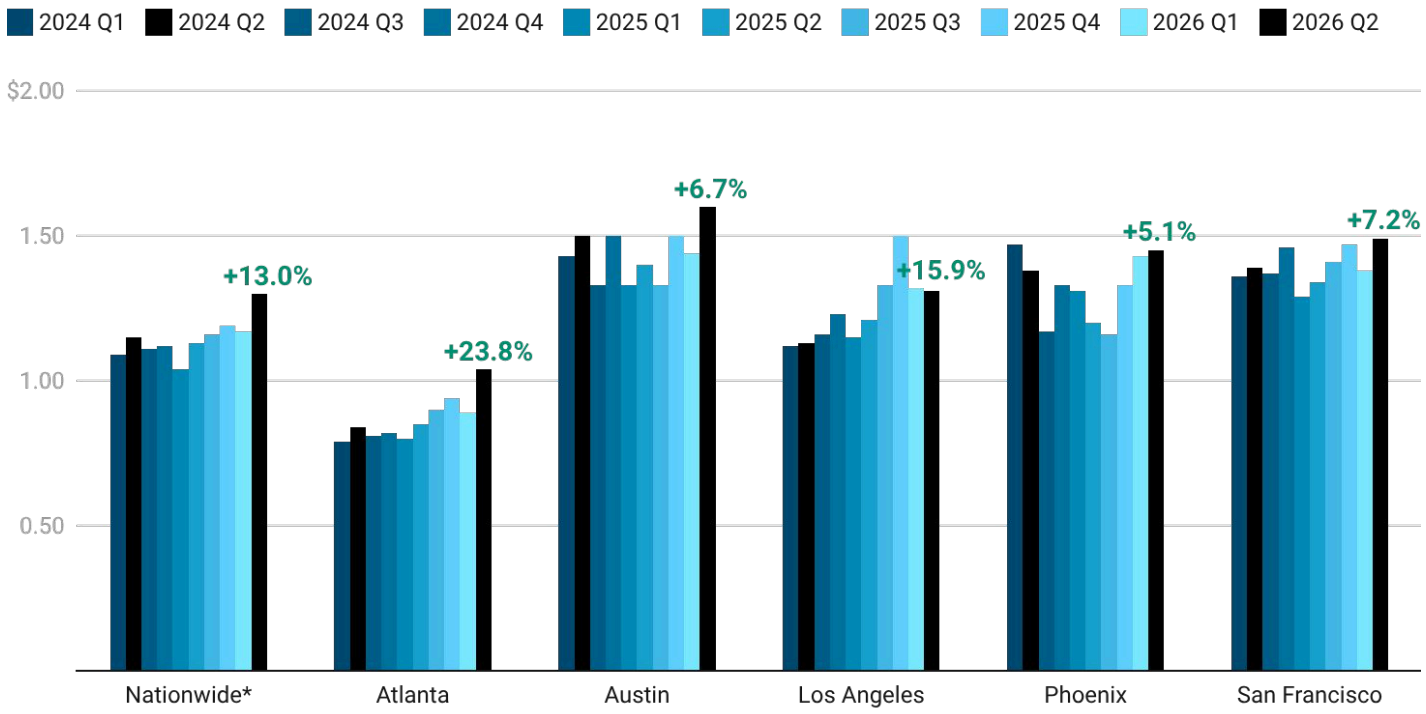
Tips per Trip: Increased Most in Atlanta and Los Angeles

From Q2 2024 to Q2 2026, median tips per trip increased in all five AV cities. Atlanta had the largest percentage increase, rising 23.8% from $0.84 to $1.04, although it still had the lowest median tips per trip among the five AV cities in Q2 2026. Los Angeles increased 15.9%, from $1.13 to $1.31. Both increases were larger than the 13.0% nationwide increase, from $1.15 to $1.30.

San Francisco increased 7.2%, from $1.39 to $1.49. Austin increased 6.7%, from $1.50 to $1.60, and had the highest median tips per trip among the five AV cities in Q2 2026. Phoenix increased 5.1%, from $1.38 to $1.45.

Tips per trip increased most in Atlanta and Los Angeles among AV cities

Quarterly median tip per trip for rideshare drivers, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

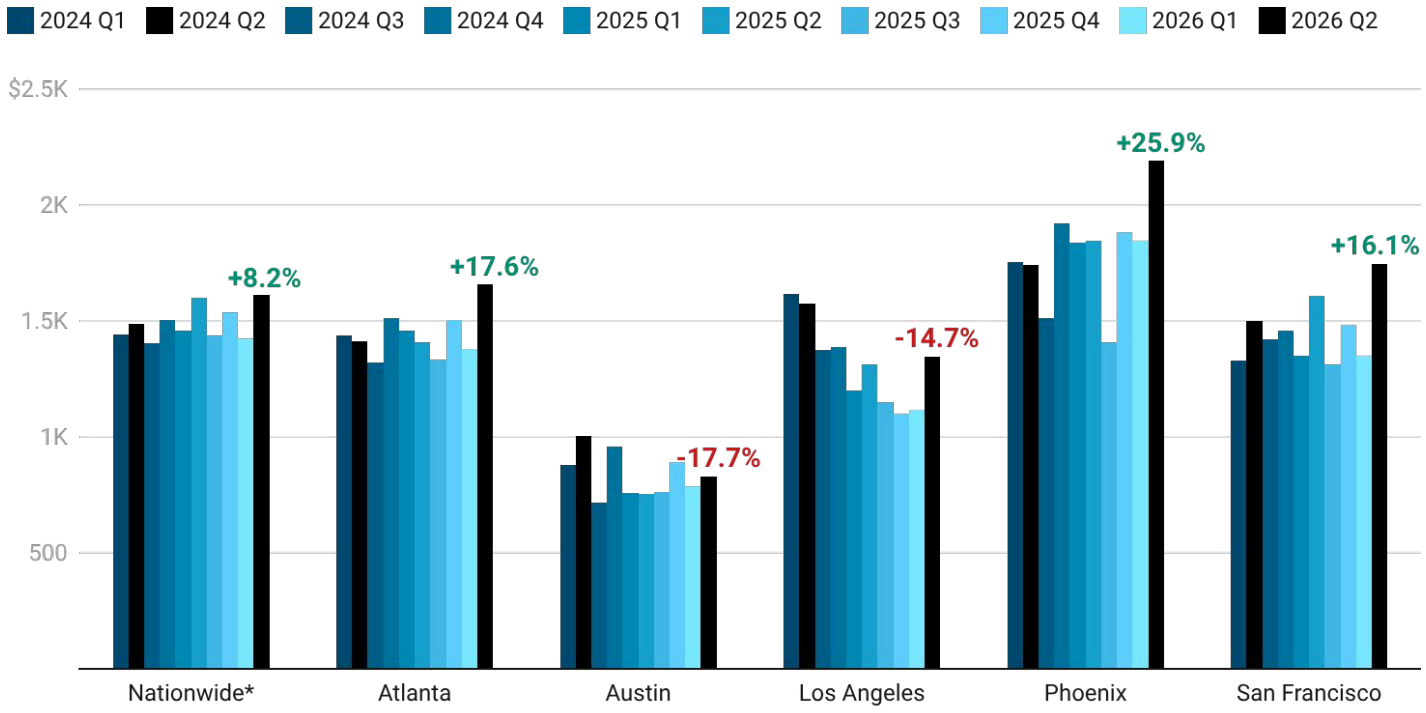
Quarterly Gross Pay: Increased in Three AV Cities and Decreased in Austin and Los Angeles

From Q2 2024 to Q2 2026, quarterly gross pay excluding tips increased in Phoenix, Atlanta, and San Francisco. Phoenix had the largest increase at 25.9%, followed by Atlanta at 17.6% and San Francisco at 16.1%. Nationwide excluding AV cities, quarterly gross pay increased 8.2%.

Quarterly gross pay decreased 17.7% in Austin and 14.7% in Los Angeles, despite increased hourly pay in both cities. Median work hours also decreased substantially in both cities, by 24.3% in Austin and 17.8% in Los Angeles, which likely contributed to lower quarterly pay.

Gross pay was highest and grew fastest in Phoenix, while Austin and LA declined

Quarterly median gross pay (excluding tips) for rideshare drivers, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

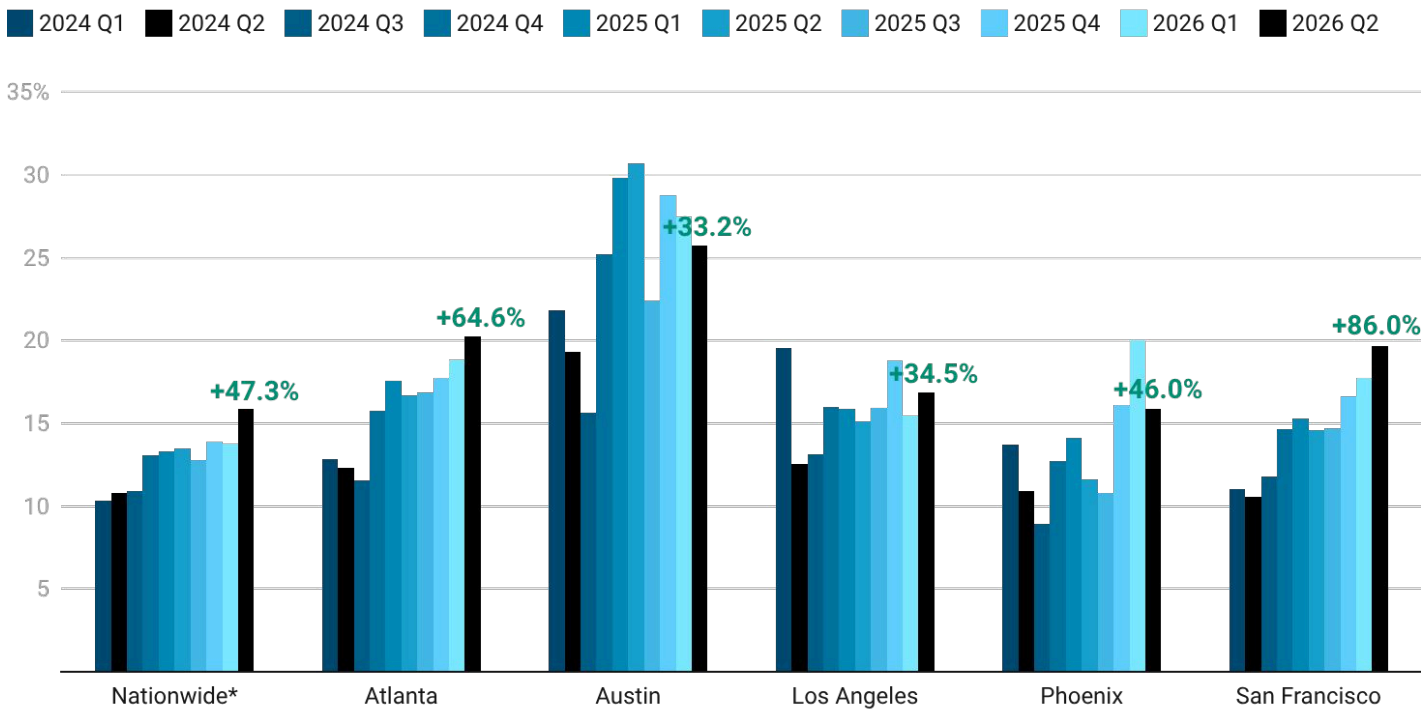
Premium Ride Share: Increased Most in San Francisco

From Q2 2024 to Q2 2026, premium ride share increased in all five AV cities and nationwide. Premium rides are ride types that cost more than a standard UberX or Lyft ride in exchange for a larger or higher-end vehicle or a faster pickup, such as Comfort, XL, Black, and Priority.

San Francisco had the largest increase among the AV cities, from 10.6% to 19.7% of trips, an increase of 9.1 percentage points, or 86% on a relative basis. Atlanta increased from 12.3% to 20.3%. Nationwide excluding AV cities, premium ride share increased from 10.8% to 15.9%. Austin had the highest premium ride share among the five AV cities in Q2 2026, at 25.7%.

Premium ride share rose everywhere, but most in Atlanta and SF

Quarterly percentage of ride trips that were premium**, with relative percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco. **Premium includes Black, Black SUV, Comfort, Lux, Priority, XL, and XXL.*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

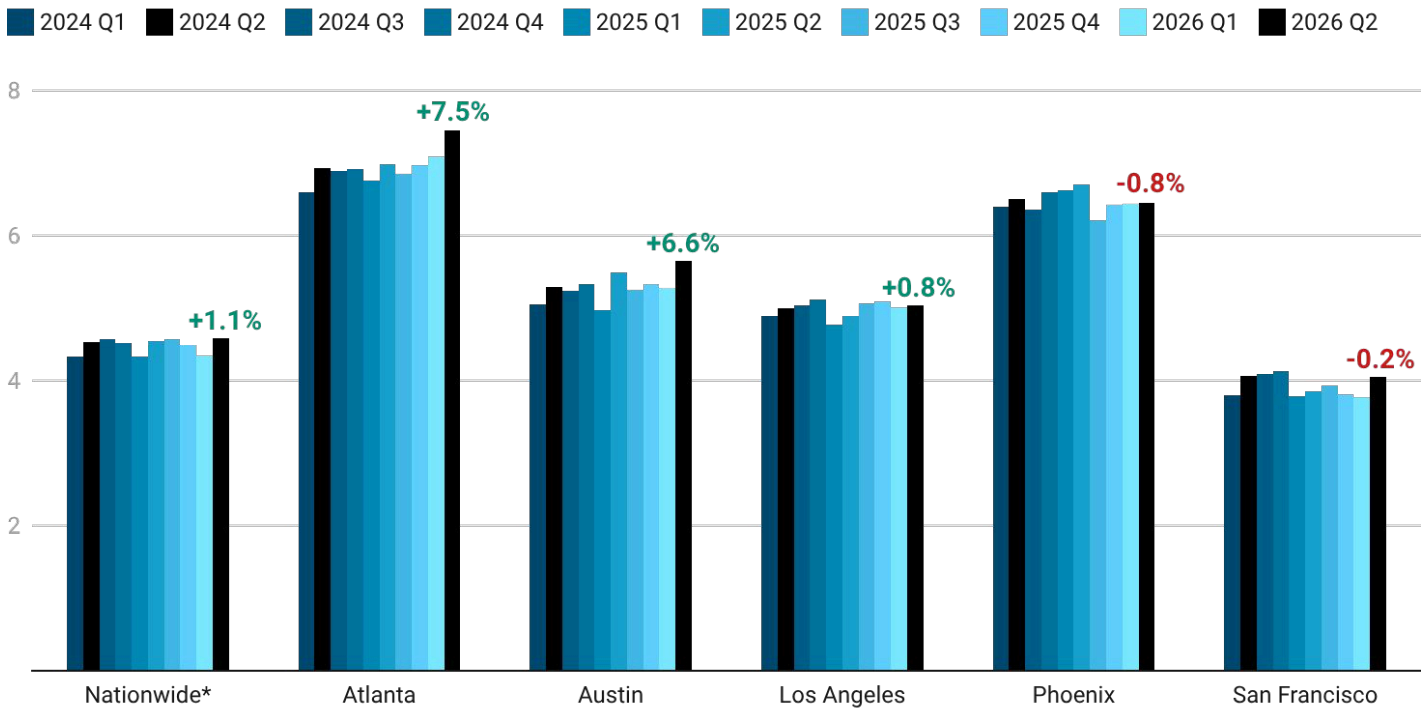
Trip Distance: Increased Most in Atlanta and Austin

From Q2 2024 to Q2 2026, median trip distance increased 7.5% in Atlanta, from 6.93 to 7.45 miles. Austin increased 6.6%, from 5.30 to 5.65 miles. Both increases were larger than the 1.1% increase nationwide excluding AV cities.

Median trip distance increased 0.8% in Los Angeles, decreased 0.8% in Phoenix, and decreased 0.2% in San Francisco. Each of these changes was less than a tenth of a mile, so trip distance in these three cities was essentially unchanged.

Trip distance held relatively flat, but increased in Atlanta and Austin

Quarterly median pickup-to-dropoff distance (in miles) for rideshare trips, with percent change from Q2 2024 to Q2 2026



**Nationwide excludes cities with AV presence: Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, San Francisco*

Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Q1 2024 - Q2 2026 | Geography: Nationwide*, Atlanta, Austin, Los Angeles, Phoenix and San Francisco Metro Areas • Created with Datawrapper

Five AV Cities at a Glance

The summary below brings together the two-year changes from Q2 2024 to Q2 2026 across the five AV cities.

Two-year changes in driver activity, pay, and platform fees

Percent difference between Q2 2024 and Q2 2026 in quarterly median per metric cited in table across 5 cities with heavy AV presence compared to Nationwide excluding AV-present cities

Market	Platform Fee Rate	Platform Fee	Customer Price	Trips per Hour	Utilization	Hourly Gross Pay (Before Tips)	Hourly Base Pay
Nationwide*	6.9%	19.2%	11.7%	−1.2%	−3.9%	5.9%	5.4%
Atlanta, GA	−28.7%	−19.1%	14.5%	−5.8%	−4.2%	12.1%	7.6%
Austin, TX	−18.4%	−8.1%	10.5%	−2.9%	−0.9%	4.0%	2.1%
Los Angeles, CA	−3.3%	0.0%	5.7%	−3.7%	−4.7%	4.8%	−2.3%
Phoenix, AZ	−12.9%	1.1%	13.3%	0.0%	−2.6%	9.0%	10.3%
San Francisco, CA	−46.3%	−47.1%	0.0%	−4.2%	−2.1%	3.3%	0.7%

Market	Per-Trip Gross Pay (Before Tips)	Per-Trip Base Pay	Per-Trip Tip Pay	Quarterly Gross Pay (Before Tips)	Premium Share of Trips	Trip Distance	Work Hours
Nationwide*	7.8%	6.7%	13.0%	8.2%	47.3%	1.1%	2.4%
Atlanta, GA	20.7%	16.4%	23.8%	17.6%	64.6%	7.5%	4.9%
Austin, TX	10.3%	7.9%	6.7%	−17.7%	33.2%	6.6%	−24.3%
Los Angeles, CA	8.6%	1.5%	15.9%	−14.7%	34.5%	0.8%	−17.8%
Phoenix, AZ	10.4%	9.8%	5.1%	25.9%	46.0%	−0.8%	17.4%
San Francisco, CA	7.9%	5.9%	7.2%	16.1%	86.0%	−0.2%	10.4%

*Nationwide group excludes the following AV-present cities: Phoenix, AZ, Los Angeles, CA, San Francisco, CA, Austin, TX, Atlanta, GA, Dallas, TX, Houston, TX, Las Vegas, NV, Miami, FL, Orlando, FL, San Antonio, TX

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q2 2024 & Q2 2026 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide (excl AV cities) | Created by Susan Huntington | Created with Datawrapper

City-by-City Analysis

Across the five AV cities, platform fee rates decreased in every market. The city-by-city sections below show the two-year changes in activity, earnings, ride type mix, and work hours from Q2 2024 to Q2 2026.

San Francisco: Customer Prices Stayed the Same While Driver Pay Increased

From Q2 2024 to Q2 2026, San Francisco's median customer price remained unchanged at $16.95, while median platform fees decreased 47.1% and the median platform fee rate fell from 19.0% to 10.2%. Premium ride share increased from 10.6% to 19.7% of trips, the largest increase among the five AV cities.

At the same time, median hourly gross pay excluding tips increased 3.3%, median quarterly gross pay excluding tips increased 16.1%, and work hours increased 10.4%, even as trips per hour decreased 4.2% and utilization decreased 2.1% on a relative basis.

San Francisco: Two-Year Changes

Metric	San Francisco	Nationwide*
Customer price	0.0%	11.7%
Platform fee	−47.1%	19.2%
Platform fee rate	−46.3%	6.9%
Premium ride share	86.0%	47.3%
Hourly gross pay, excluding tips	3.3%	5.9%
Quarterly gross pay, excluding tips	16.1%	8.2%
Work hours	10.4%	2.4%

**Nationwide group excludes the following AV-present cities: Phoenix, AZ, Los Angeles, CA, San Francisco, CA, Austin, TX, Atlanta, GA, Dallas, TX, Houston, TX, Las Vegas, NV, Miami, FL, Orlando, FL, San Antonio, TX*

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q2 2024 & Q2 2026 | Geography: San Francisco Metro Area and Nationwide (excl AV cities) • Created with Datawrapper

Austin: Work Hours Fell Most, Alongside the Largest Decline in Quarterly Gross Pay

From Q2 2024 to Q2 2026, median gross pay per trip excluding tips increased 10.3% and median hourly gross pay excluding tips increased 4.0% in Austin. But median work hours fell 24.3%, the largest decline among the five AV cities, and median quarterly gross pay excluding tips fell 17.7%, also the largest decline.

Median trip distance also increased 6.6%, premium ride share increased from 19.3% to 25.7% of trips, and the median platform fee rate decreased 18.4% on a relative basis. Overall, although pay per trip and per hour increased, substantially fewer work hours likely contributed to lower quarterly gross pay for drivers.

Austin: Two-Year Changes

Metric	Austin	Nationwide*
Work hours	−24.3%	2.4%
Quarterly gross pay, excluding tips	−17.7%	8.2%
Hourly gross pay, excluding tips	4.0%	5.9%
Gross pay per trip, excluding tips	10.3%	7.8%
Trip distance	6.6%	1.1%
Platform fee rate	−18.4%	6.9%

**Nationwide group excludes the following AV-present cities: Phoenix, AZ, Los Angeles, CA, San Francisco, CA, Austin, TX, Atlanta, GA, Dallas, TX, Houston, TX, Las Vegas, NV, Miami, FL, Orlando, FL, San Antonio, TX*

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q2 2024 & Q2 2026 | Geography: Austin Metro Area and Nationwide (excl AV cities) • Created with Datawrapper

Atlanta: Fewer Trips per Hour, but Higher Pay per Trip and per Hour

From Q2 2024 to Q2 2026, Atlanta had the largest decrease in median trips per hour among the five AV cities, falling 5.8% from 1.54 to 1.45. At the same time, median gross pay per trip excluding tips increased 20.7% and median hourly gross pay excluding tips increased 12.1%, both the largest increases among the five cities. Median quarterly gross pay excluding tips also increased 17.6%.

Median trip distance increased 7.5%, median customer prices increased 14.5%, and premium ride share increased from 12.3% to 20.3% of trips. The median platform fee rate fell from 18.4% to 13.1%.

Longer trips and a greater premium share suggest the mix of rides handled by human drivers may be changing. The lower platform fee rate points to a separate shift in how much of the customer price platforms are taking. AV expansion could be one factor, but the data cannot determine whether it caused these changes.

Atlanta: Two-Year Changes

Metric	Atlanta	Nationwide*
Gross pay per trip, excluding tips	20.7%	7.8%
Base pay per trip	16.4%	6.7%
Hourly gross pay, excluding tips	12.1%	5.9%
Quarterly gross pay, excluding tips	17.6%	8.2%
Trips per hour	−5.8%	−1.2%
Trip distance	7.5%	1.1%
Platform fee rate	−28.7%	6.9%

**Nationwide group excludes the following AV-present cities: Phoenix, AZ, Los Angeles, CA, San Francisco, CA, Austin, TX, Atlanta, GA, Dallas, TX, Houston, TX, Las Vegas, NV, Miami, FL, Orlando, FL, San Antonio, TX*

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q2 2024 & Q2 2026 | Geography: Atlanta Metro Area and Nationwide (excl AV cities) • Created with Datawrapper

Los Angeles: Higher Pay per Trip and per Hour, but Lower Quarterly Pay

From Q2 2024 to Q2 2026, median gross pay per trip excluding tips increased 8.6% and median hourly gross pay excluding tips increased 4.8%. But median work hours fell 17.8%, the second-largest decline among the five AV cities, and median quarterly gross pay excluding tips fell 14.7%, also the second-largest decline.

Driver activity also decreased, with median trips per hour down 3.7% and utilization down 4.7% on a relative basis, the largest utilization decline among the five cities.

Despite higher pay per trip and per hour, lower work hours likely led to a decrease in quarterly gross pay.

Los Angeles: Two-Year Changes

Metric	Los Angeles	Nationwide*
Work hours	−17.8%	2.4%
Quarterly gross pay, excluding tips	−14.7%	8.2%
Hourly gross pay, excluding tips	4.8%	5.9%
Gross pay per trip, excluding tips	8.6%	7.8%

**Nationwide group excludes the following AV-present cities: Phoenix, AZ, Los Angeles, CA, San Francisco, CA, Austin, TX, Atlanta, GA, Dallas, TX, Houston, TX, Las Vegas, NV, Miami, FL, Orlando, FL, San Antonio, TX*

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q2 2024 & Q2 2026 | Geography: Los Angeles Metro Area and Nationwide (excl AV cities) • Created with Datawrapper

Phoenix: More Work Hours and Higher Quarterly Pay

From Q2 2024 to Q2 2026, median work hours in Phoenix increased 17.4%, the largest increase among the five AV cities, while median quarterly gross pay excluding tips increased 25.9%, also the largest increase. Median hourly gross pay increased 9.0% and median gross pay per trip excluding tips increased 10.4%.

Premium ride share increased 5.0 percentage points, from 10.9% to 15.9% of trips, a 46.0% relative increase, while median trip distance remained essentially flat, decreasing 0.8%. Phoenix was also the only AV city where median trips per hour did not decrease, remaining at 1.72.

Median trip distance remained essentially flat even as pay per trip increased, while premium rides made up a larger share of trips.

Phoenix: Two-Year Changes

Metric	Phoenix	Nationwide*
Quarterly gross pay, excluding tips	25.9%	8.2%
Work hours	17.4%	2.4%
Trips per hour	0.0%	−1.2%
Gross pay per trip, excluding tips	10.4%	7.8%
Premium ride share	46.0%	47.3%
Trip distance	−0.8%	1.1%
Hourly gross pay, excluding tips	9.0%	5.9%
Platform fee rate	−12.9%	6.9%

**Nationwide group excludes the following AV-present cities: Phoenix, AZ, Los Angeles, CA, San Francisco, CA, Austin, TX, Atlanta, GA, Dallas, TX, Houston, TX, Las Vegas, NV, Miami, FL, Orlando, FL, San Antonio, TX*

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q2 2024 & Q2 2026 | Geography: Phoenix Metro Area and Nationwide (excl AV cities) • Created with Datawrapper

Key Findings and What They Mean

From Q2 2024 to Q2 2026, one of the clearest patterns across the five AV cities was a decline in platform fee rates. Median platform fee rates decreased in every AV city while increasing 6.9% on a relative basis nationwide excluding AV cities. At the same time, median gross pay per trip excluding tips increased in all five AV cities.

Driver activity generally moved in the opposite direction. Trips per hour decreased in four of the five AV cities, while remaining unchanged in Phoenix. Yet hourly gross pay increased in all five cities, showing that lower trip frequency did not translate into lower hourly earnings over the two-year comparison period.

The mix of rides also changed. Premium ride share increased in all five AV cities, although it also increased nationwide. Trip distance was more mixed, increasing notably in Atlanta and Austin but remaining roughly flat in Los Angeles, Phoenix, and San Francisco.

The effect on total driver earnings was not consistent across markets. Austin and Los Angeles saw fewer work hours and lower quarterly gross pay, while Phoenix had the largest increases in both. Quarterly gross pay also increased in Atlanta and San Francisco.

Taken together, lower platform fee rates and higher gross pay per trip across all five AV cities are consistent with the possibility that increased competition, including from AV services, is affecting how revenue is distributed on human-driven rides. The increase in premium ride share may also point to a changing mix of rides handled by human drivers. However, the data cannot isolate the effect of AV deployment from other market factors, and some of these trends, including the increase in premium ride share, are also visible nationwide.

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, visit www.gridwise.io/analytics or click the button to the right:

Contact Us

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About the Data

Gridwise Analytics data is generated from activity recorded by drivers using the Gridwise app, with the dataset used in this report covering Q1 2024 through Q2 2026. The data is cleaned, validated, anonymized, and aggregated before analysis. This report uses those records to compare rideshare activity, earnings, trip characteristics, platform fees, and fee rates across AV-active metro areas and the national comparison. Most findings and callouts in the report focus on the two-year comparison period from Q2 2024 to Q2 2026, unless otherwise noted.

Nationwide Excluding AV Cities

The national comparison excludes the metro areas associated with Atlanta, Austin, Dallas, Houston, Las Vegas, Los Angeles, Miami, Orlando, Phoenix, San Antonio, and San Francisco.

The individual city sections cover Atlanta, Austin, Los Angeles, Phoenix, and San Francisco. City names throughout the report refer to their metro areas.

How the Metrics Are Reported

Most metrics are reported as medians. Incentive pay per trip and bonus pay per trip are reported as averages in the combined AV-city comparison. Premium ride share is the share of trips classified as premium. Tips are reported separately from gross pay.

All percentage changes compare Q2 2026 with Q2 2024, a two-year comparison period, and are not annualized. For metrics already expressed as percentages, including platform fee rate, utilization, and premium ride share, percentage changes are relative unless labeled as percentage-point changes. For example, a rate that decreases from 20% to 15% has decreased by 5 percentage points, which is a 25% relative decrease.

The medians for different metrics are calculated separately. Multiplying median hourly pay by median work hours does not produce an exact median quarterly pay figure. You also cannot add or subtract the figures to calculate exactly how much each pay component contributed to earnings.

What the Data Does Not Show

This analysis cannot isolate the effect of AV services from other market factors that may have contributed to changes in driver activity, pay, customer prices, or platform fees.

It also cannot determine why drivers worked more or fewer hours, or whether the same individual drivers experienced the changes shown in the city-level figures. Changes in which drivers and trips are included, along with other local conditions, may affect the comparisons.

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 COMPARE Q2 2024 WITH Q2 2026

Rideshare earnings follow seasonal patterns across U.S. markets. Periods of lower demand and reduced incentive spending cause short-term swings, which can hide underlying trends in month-over-month or quarter-to-quarter comparisons.

To account for seasonality, this report compares the same quarter two years apart, Q2 2024 and Q2 2026. Comparing the same quarter reduces seasonal distortion, and the two-year window gives a clearer view of how earnings and activity in AV-active markets have changed as AV services expanded.

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