Growth of App-Based Ride Services

Bruce Schaller
Schaller Consulting
NACTO, Oct. 1, 2018
The New Automobility:
Lyft, Uber and the Future of
American Cities

July 25, 2018
Ridership by end of 2018:

- Taxi/TNC  4.3 - 4.8 billion
- Local bus  4.7 billion
- Urban rail  4.3 billion

(Annual rate)

Lyft pick-ups in San Francisco Bay Area

October 2017

Concentrated in city core

Source: Unpublished trip data
Lyft pick-ups, by time of day and day of week, October 2017.

• 976 million additional miles driven (New York City, 2013 to 2017)

• 85% more VMT from TNC versus previous mode (Denver area)

• 20-26% of vehicles making intra-S.F. trips in Downtown/Mission district

Jobs up, but Rail Ridership down

[Graph showing ridership and employment trends from 2012 to 2017]
Chicago

The graph shows the trends in Ridership and Employment from 2012 to 2017. Ridership starts at around 100 in 2012 and peaks in 2015, after which it decreases. Employment, represented by the orange line, starts at around 100 in 2012, increases steadily and peaks in 2016, before declining in 2017.
Los Angeles

Chart showing ridership and employment in Los Angeles from 2012 to 2017.

- Ridership: Decreased from 2012 to 2017.
“Would have used if TNC not available for ride”

- Public transit
- Walking/Biking
- Not make the trip
- Personal auto
- Taxicab

Average across major cities:
- 60%
- 40%

Sources: Clewlow and Mishra, “Adoption, Utilization and Impacts of Ride-Hailing in the U.S.”
Henao, “Impacts of Ridesourcing.”
Rayle, et. al., “Just a Better Taxi?”
MAPC, “Fare Choices”
These data reflect relatively dense urban conditions.
Customer is saying

Save time

Reduce stress
Moving toward shared, straight-line

- Walk to pick-up location
- Minimize turns
- UberPOOL Express
- Lyft Shared Rides

Adding more options

- Bike share
- Dockless electric scooters
Taxi

Door-to-door, exclusive ride on-demand

Transit

Straight line routes, shared ride, walk & wait
Taxi

Door-to-door, exclusive ride on-demand

Transit

Straight line routes, shared ride, walk & wait
- Scooter
- Bike
- Walk
- TNC
- Taxi

Door-to-door, exclusive ride on-demand

- Chariot
- Via
- Uber Pool Express
- Lyft Shared Ride
- Public Transit

Straight line routes, shared ride, walk & wait
Mode Shares

- Boston, DC, Philly, Chicago, SF, Seattle, Miami, L.A.
- Residents of dense residential areas
- Frequent TNC users (5+ trips in last 30 days)

Source: National Household Travel Survey, 2016-17
Mode Shares

- Boston, DC, Philly, Chicago, SF, Seattle, Miami, L.A.
- Residents of dense residential areas
- Frequent TNC users (5+ trips in last 30 days)

Source: National Household Travel Survey, 2016-17
Mode Shares

- Boston, DC, Philly, Chicago, SF, Seattle, Miami, L.A.
- Residents of dense residential areas
- Frequent TNC users (5+ trips in last 30 days)

Source: National Household Travel Survey, 2016-17
Mode Shares

- Boston, DC, Philly, Chicago, SF, Seattle, Miami, L.A.
- Residents of dense residential areas
- Frequent TNC users (5+ trips in last 30 days)

Source: National Household Travel Survey, 2016-17