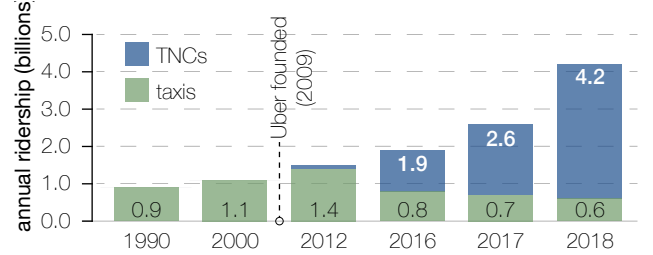


TRANSPORTATION NETWORK COMPANIES (TNCs)

DEPLOYMENT FACTS:

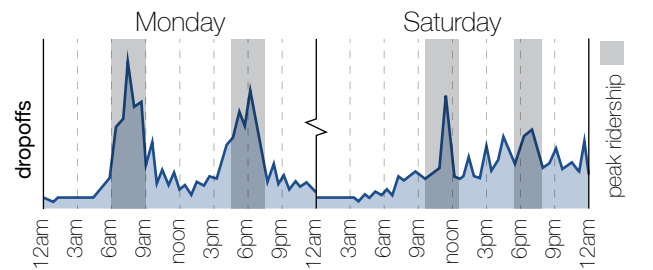
- TNCs started in the US in 2009. In 2018 US annual ridership reached **4.2 billion rides**.¹
- Taxi trips have decreased while TNC trips have increased, and overall number of for-hire trips has increased significantly.¹ (See Figure 1)
- Globally, in 2019 there were **996 million users**, an increase of **260 million users** from 2017.²
- Peak hours of use for TNCs in the US are: 7am-9am and 5pm-7pm weekdays, 10am-12pm and 5pm-7pm on weekends.³ (See Figure 2)

Fig. 1: TNC and Taxi Ridership in the US, 1990-2017



Source: Based on The New Automobility. Schaller, 2018

Fig. 2: Peak Ridership Hours (Uber)

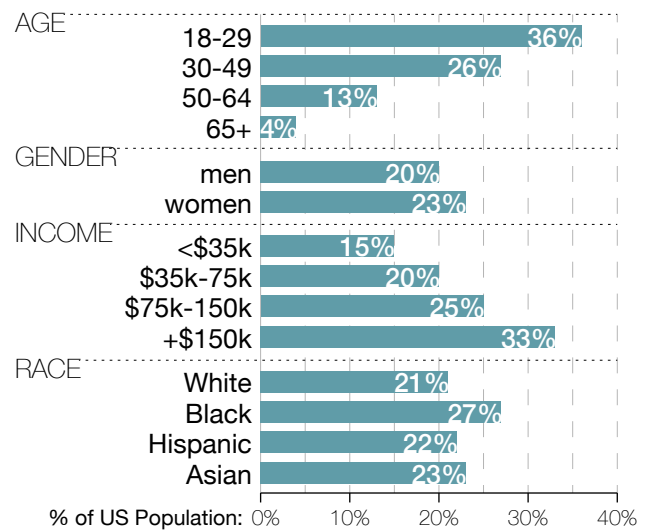


Source: Based on The SF Curb Study. Fehr & Peers, 2018

RIDERSHIP:

- Overall US Ridership in 2018:⁵
 - **36% of total US population** used TNCs. Up from 15% of total US pop. in 2015.
 - **51% of US millennials** used TNC services. Up from 21% of US millennials in 2015.
 - **19% of US rural residents + 45% of US urban residents** used TNC services.

Fig. 3: US TNC Ridership Demographics 2017



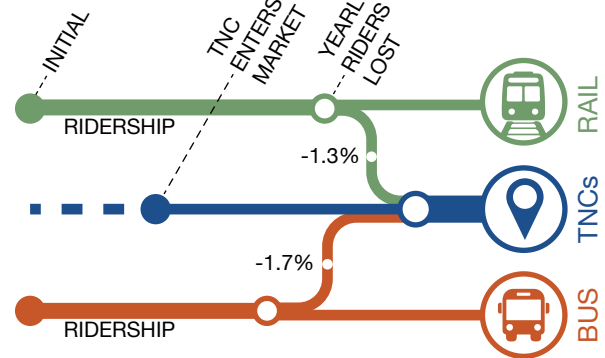
Source: Based on Disruptive Transportation. Clewlow + Mishra, 2017

TRANSPORTATION NETWORK COMPANIES (TNCs)

MODE SHIFT:

- 60% of TNC users report that they would have used transit, walking or biking for trips were a TNC not an option.¹
- Each year after a TNC first enters a market there is a **1.3% reduction in heavy rail ridership** and **1.7% reduction in bus ridership**.⁶ (See Figure 4)
- Nationally, only **7% of TNC users combine their TNC trips with public transit on a weekly basis**. 35% do so occasionally.⁶

Fig. 4: Change in Transit Ridership after TNCs Enter a Market

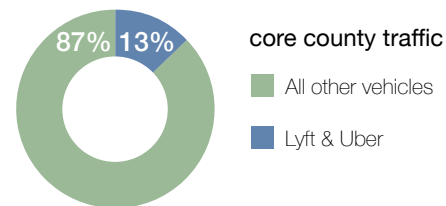


Data source: Understanding the Recent Transit Ridership Decline. Graehler, Mucci, & Erhardt, 2018.

IMPACTS:

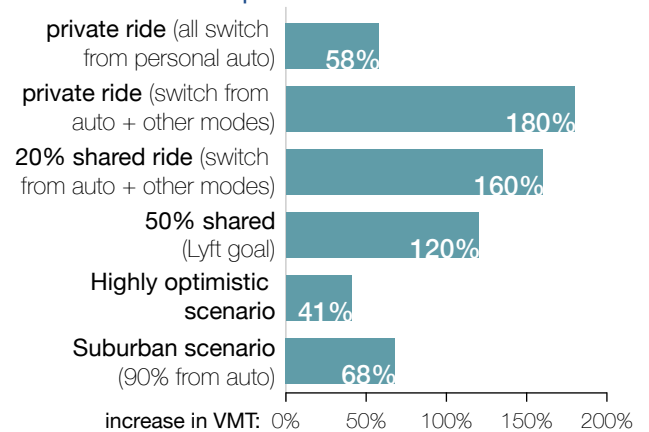
- In some major US cities like Washington, Boston, and San Francisco, **7-13% of total traffic** in the core county is attributed to TNCs, despite **2-3% of regional trips** being TNCs.⁷ (See Figure 5)
- Using publicly available data, Schaller found that the **average private TNC trip is 63% longer than a private auto trip**. Using this as a baseline, he then modeled different scenarios for switching to TNCs. In each case, switching from private auto travel or other modes actually **increases total vehicle miles traveled (VMT)**.¹ (See Figure 6)
- TNC drivers spend a significant portion of time traveling to other destinations or waiting to be hailed, which is known as the **cruising rate**.
- In New York City, **the cruising rate for ride hailing services was 41% in 2018**. NYC attempted to cap cruising rates at 31% by 2020, but was sued by Uber and blocked by the courts.⁸

Fig. 5: Percentage of TNC Traffic in San Francisco



Data Source: Estimated TNC Share of VMT in Six Metropolitan Regions. Fehr & Peers, 2018

Fig. 6: Change in Overall Mileage from TNC Private and Shared Ride Trips



Source: Based on The New Automobility. Schaller, 2018

SOURCES:

Graphic design by Urbanism Next, data sourced from:

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4. Clewlow, R., & Mishra, G. (October, 2017). [Disruptive Transportation: The Adoption, Utilization, and Impacts of Ride-Hailing in the United States](#) (direct download). *Institute of Transportation Studies- UC Davis*.
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7. Fehr & Peers. (September, 2018). [Estimated TNC Share of VMT in Six Metropolitan Regions](#).
8. Bellon, T. (December, 2019). [In win for Uber, Lyft, judge strikes down New York City's cruising cap](#). Reuters.