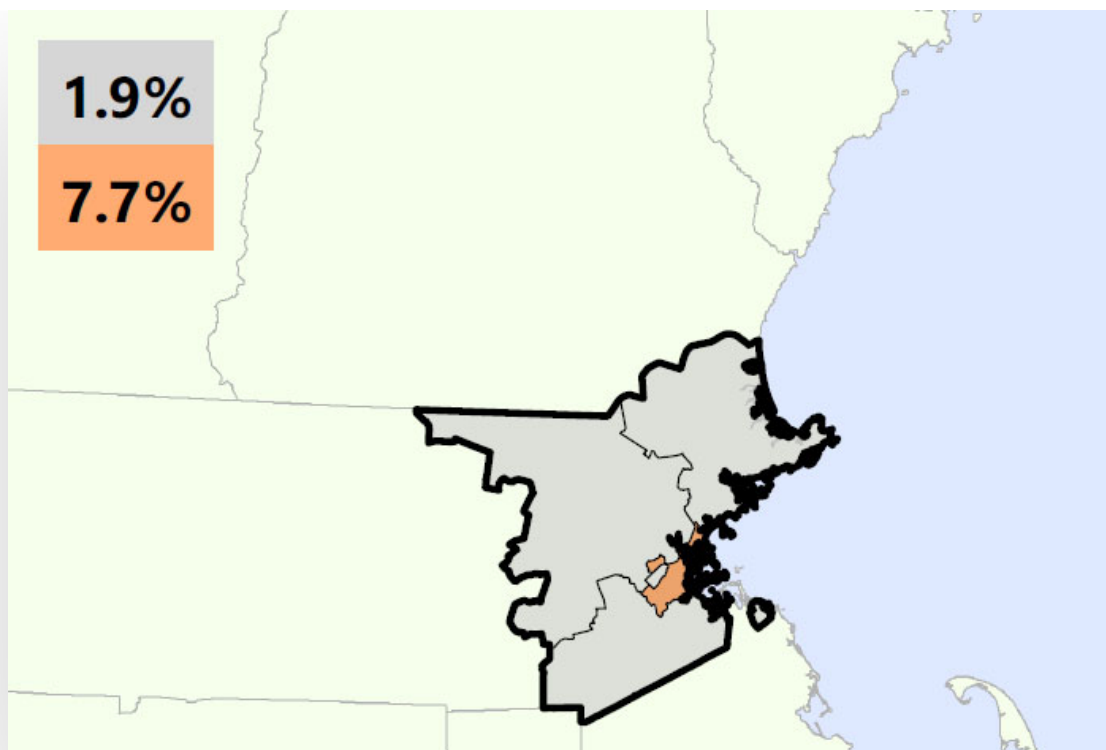




What are TNCs Share of VMT?

As transportation enthusiasts, the explosion of mobility options the past few years has been fun to see. We're proud of the role we've played during these times, providing objective analysis and partnering with our clients and communities to navigate new waters. When Lyft and Uber (TNCs) came to us with a question — What are TNCs' share of VMT? — we jumped at the opportunity; not only to help valued clients, but also to add to the dialogue about mobility and cities.

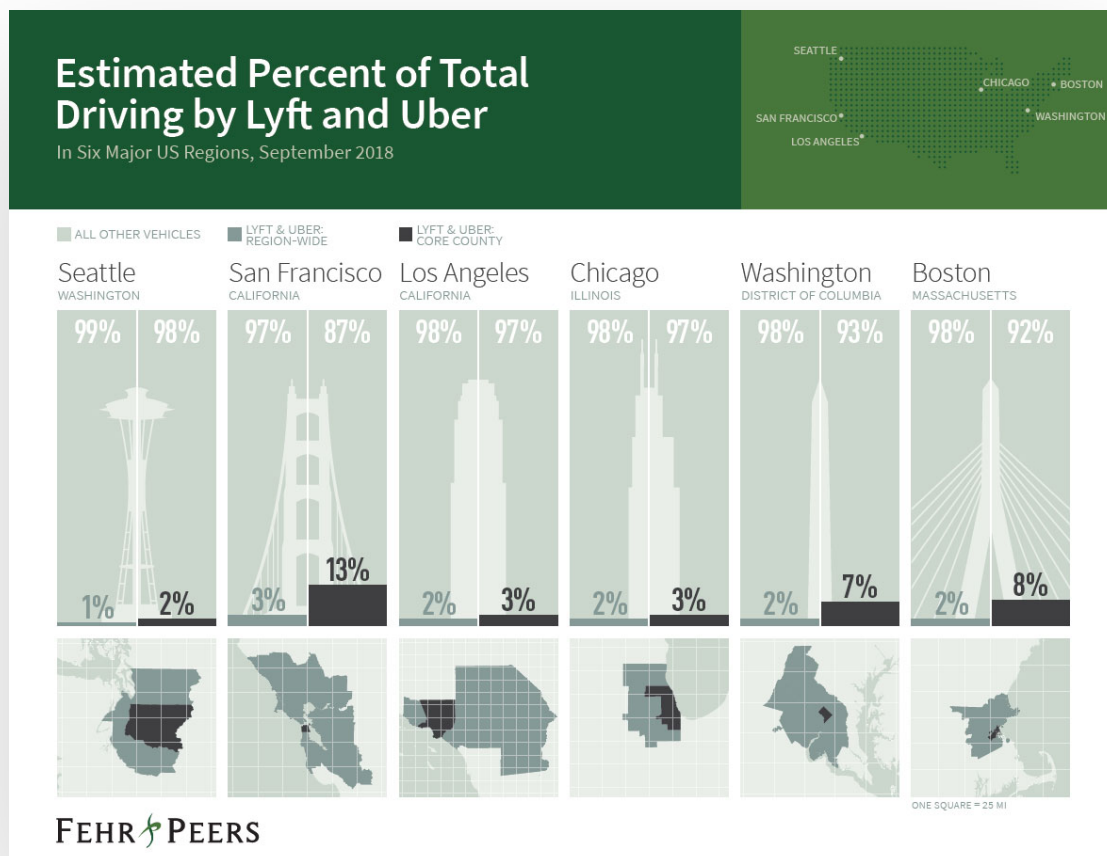


Our team determined the “when” and “where.”

The question is straightforward, but it only covers “who” and “what.” The “when” and “where” were determined by our team. After discussing too many analysis parameters to list, we settled on our extents: six metro areas to provide national coverage studied during a single month. Our aim was to not be too zoomed in to miss the big picture, but not too zoomed out to provide insight.

What is the estimated percent of total driving?

You can see the topline results to the right. In September 2018, TNCs accounted for approximately 1 – 3 percent of total VMT in the six metro regions, with the balance of VMT generated by other sources, such as passenger and commercial vehicles. When looking solely at the core county of each region, the share of TNC VMT is approximately 2 – 13 percent, with King County in Seattle representing the least and San Francisco County representing the most.



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FEHR & PEERS

MEMORANDUM

Date: August 6, 2019
To: Brian McGuigan, Lyft and Chris Pangilinan, Uber
From: Melissa Balding, Teresa Whinery, Eleanor Leshner and Eric Womeldorff, Fehr & Peers
Subject: Estimated TNC Share of VMT in Six US Metropolitan Regions (Revision 1)

SF19-1016

Introduction

Fehr & Peers was engaged by Lyft and Uber to determine their combined Vehicle Miles Traveled (VMT) in six metropolitan regions in September 2018 and compare that value to approximate total VMT in each area for the same period. While a high-level exercise, both the analysis process and the results should help Lyft and Uber better understand how their services contribute to total VMT in each region at a single point in time and help them form appropriate narratives for both internal and external communication. This memorandum documents our methodology and findings.

Specifically, Fehr & Peers analyzed travel by Transportation Network Companies ("TNCs," used as shorthand for Lyft and Uber exclusively from here on) as well as VMT by all other passenger and freight vehicles ("total VMT" from here on) in the following six metropolitan regions: Boston, MA; Chicago, IL; Los Angeles, CA; San Francisco, CA; Seattle, WA; and Washington, DC. These locations were selected to show results from a range of urban centers throughout the United States. Results are presented at two levels: at the regional level, using primarily Metropolitan Planning Organization boundaries that incorporate both central urban areas and select surrounding counties; and the "core" county in each region, which contains the main city and densest job and population center(s).

Results are presented at the regional level to provide a snapshot of how TNCs contribute to overall vehicular activity in a region, which serves as a proxy for an economic center. While much of the public discussion related to TNCs has focused on the areas where TNC use is most prevalent (i.e.,

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