Disruptive Trends and How They Affect Silicon Valley
What influences travel behavior

- Gasoline Prices
- GDP, Real Income Growth
- Household Formation
- Labor Force Participation
- Driving Age Population
- Licensing Regulations
- Non-Auto Mode Options
- Suburban & Urban Migration
- Congestion & Time Use
- Tele-Commuting
- Social Networking
- Internet Shopping
- Vehicle Ownership
- Goods & Services Delivery
- Autonomous Cars
- Shared Mobility Marketplace
Future Trends

- Internet Shopping
- Vehicle Ownership
- Goods & Services Delivery
- Autonomous Cars
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Ride-hailing growth

Source: Uber

Gross Bookings (billions $)

2013 2014 2015 2016

Lyft Annual Completed Rides ( Millions)

Lyft's completed rides tripled from 53.3 million to 162.6 million.
## Ride-hailing

<table>
<thead>
<tr>
<th>Mode Shifts from</th>
<th>San Francisco</th>
<th>Denver</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Taxi/Auto</td>
<td>57 %</td>
<td>46 %</td>
</tr>
<tr>
<td>- Transit/Carpool</td>
<td>33 %</td>
<td>30 %</td>
</tr>
<tr>
<td>- Walk/Bike</td>
<td>10 %</td>
<td>12 %</td>
</tr>
<tr>
<td>Induced Trips</td>
<td>8 %</td>
<td>12 %</td>
</tr>
<tr>
<td>New Vehicle Trips</td>
<td>~50 % (of TNC)</td>
<td></td>
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</tbody>
</table>
Ride-hailing to AVs.

Trend towards AVs replacing drivers is clear, even if progress is disjointed.
AV tests. what happened
Next steps.

You want to travel freely

But so does everyone else

Managing travel demand can help
A Role for Policy.
Thank you.

For more information:
FP Think – fehrandpeers.com/fpthink
AV and TNCs Research – fehrandpeers.com/automated-vehicles
fehrandpeers.com/transportation-network-companies

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