



Memorandum to the Board of Directors

Taxi Upfront Fare Pilot – Year 2, Third and Fourth Quarter Report

To: SFMTA Board of Directors
Janet Tarlov, Chair
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Mike Chen, Director
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Through: Julie Kirschbaum *JK*
Director of Transportation

From: Kate Toran *KT*
Director of Taxis, Access & Mobility Services

Date: October 17, 2025

Subject: Final Taxi Upfront Fare Pilot Report

On May 20, 2025, the San Francisco Municipal Transportation Agency (SFMTA) Board of Directors voted to make the Taxi Upfront Fare Pilot (now known as the Taxi Upfront Fare Program) permanent. During the term of the Pilot, SFMTA staff provided quarterly updates to the SFMTA Board, the Board of Supervisors, and other key stakeholders regarding the implementation of the Taxi Upfront Fare Pilot (Pilot). In the spirit of this commitment, staff are publishing this final report on the Pilot program. In the interest of further transparency, taxi data is also available on the [DataSF portal](#). This report covers the first two years of the Pilot and contains detailed reporting on the third and fourth quarters (Q3 and Q4) of the second year of the Pilot, June 2024 through November 2024.

This report was delayed due to significant data quality issues that required investigation by SFMTA staff to properly validate and analyze data received from the taxi industry. SFMTA staff continue to work closely with the taxi industry to resolve the data challenges that resulted in delayed reporting.

Program Overview

The Pilot (and now the permanent Taxi Upfront Fare Program) allows taxi customers to book a ride through a Taxi E-Hail App (app) and pay the upfront fare in advance of the trip or book a trip through the app and pay the fare at the end of the trip. Additionally, Taxi E-Hail App providers may dispatch trips that originate with third-party entities (i.e. entities that do not receive permits issued by the SFMTA), which may offer upfront fares that are not based on Taximeter rates.

The Upfront Fare Pilot allowed two types of trips:

1. **Taxi Pilot Trips** have the following characteristics:
 - Originate with a customer requesting a ride through a Taxi E-Hail App
 - Driver is dispatched by a Taxi E-Hail App
 - Ride is provided by a permitted San Francisco taxi driver in a permitted San Francisco taxi vehicle
 - Upfront fare payment is based on the estimated Taximeter amount

2. **Third-Party Pilot Trips** have the following characteristics:
 - Originate with a customer requesting a ride through a third-party entity (Third-Party Provider)
 - Ride is transferred to a Taxi E-Hail App
 - Driver is dispatched by a Taxi E-Hail App
 - Ride is provided by a permitted San Francisco taxi driver in a permitted San Francisco taxi vehicle
 - Upfront fare is **not** required to be based on the estimated Taximeter amount

Three Taxi E-Hail apps participated in the Pilot program and are approved to provide Third-Party Pilot Trips: Flywheel, Arro, and Curb, representing the majority of taxi medallions in San Francisco. Flywheel first started providing Pilot trips at the program's inception in November 2022. Curb began providing Upfront Fare Pilot Trips in August 2024 and Third-Party Pilot Trips that November. Arro began providing trips in November 2024.

Tracking the Pilot Term

Although the Pilot officially launched on November 9, 2022, the first quarter metrics analysis covered the first three full months of Pilot launch—December 2022 through February 2023—to create a comparable baseline between periods that allows for year-over-year comparisons of full months.

For year 1 of the Pilot, quarterly reports cover the following periods:

- Quarter 1: December 2022 – February 2023
- Quarter 2: March 2023 – May 2023
- Quarter 3: June 2023 – August 2023
- Quarter 4: September 2023 – November 2023

For year 2 of the Pilot, quarterly reports cover the following periods:

- Quarter 1: December 2023 – February 2024
- Quarter 2: March 2024 – May 2024
- Quarter 3: June 2024 – August 2024
- Quarter 4: September 2024 – November 2024

[Quarterly reports](#) for the Pilot program are available on the SFMTA website.

Summary of Key Pilot Takeaways

Key data from the Taxi Upfront Fare Pilot shows the following:

- A total of 509,676 Pilot trips were recorded over the two Pilot years, representing 11.5% of all taxi trips during that period.

	2023- Q1	2023- Q2	2023- Q3	2023- Q4	2024- Q1	2024- Q2	2024- Q3	2024- Q4
Pilot trips provided	10,857	41,639	57,068	49,204	64,598	86,513	80,162	119,635

	Pilot Year 1	Pilot Year 2
Total Pilot Trips	158,768	350,908
Total Taxi Trips	2,189,777	2,235,434
Pilot Trips as percentage of total taxi trips	7.2%	15.7%

- In Pilot Year 1, a total of 531 drivers participated in the Pilot by providing at least one Taxi Pilot or Third-Party Pilot trip; by the end of Pilot Year 2, the number of participating drivers increased to 969.
- Driver fare revenue exceeded \$9.6 million from Pilot trips alone during the first two years of the Pilot.
- Overall taxi driver revenue grew substantially during the Pilot years as compared to pre-Pilot, with fare revenue totaling approximately \$63 million in Year 1 and \$61 million in Year 2. In 2022, the year before the Pilot began, fare revenue totaled approximately \$54.3 million.
- Third-Party Pilot Trips increased the density of taxi trips in the outer neighborhoods of San Francisco, which have historically been underserved by the taxi industry.

Methodology and Assumptions

The metrics discussed below are analyzed based on a set of methods and assumptions applied to the collection, validation, and analysis of taxi industry data.

The main source of the data in this report is the data reported by the taxi industry. As required by the Transportation Code, all taxi companies permitted to operate in the City and County of San Francisco transmit digital records of their fleet’s activity to SFMTA in real time through the SFMTA Taxi Application Programming Interface (API), which is the software interface that allows the SFMTA to receive data securely from the taxi industry. Prior to launching the Pilot program, SFMTA updated its specifications for the Taxi API data by requiring the submission of the types of data necessary for tracking the Pilot’s performance, such as upfront or metered fare payment method and the trip application origin (Taxi E-

Hail or Third-Party). For Third-Party Trips, the relevant data is transmitted to SFMTA on a bi-weekly basis from the taxi industry; the SFMTA does not receive any data directly from third-party entities.

As the SFMTA receives data from the industry, the Data Analytics team applies automated and manual validation procedures to check the quality of the data in each record received. The validation process has identified numerous data quality issues since the start of the Pilot, such as regular taxi trip records mislabeled as Taxi Pilot Trips and inaccurate meter fare estimations for Pilot trips. When an issue is identified through the validation process, the Data Analytics Team conducts an independent investigation and then collaborates with industry partners to identify a solution. The SFMTA hosts regular technical troubleshooting sessions with each of the participating taxi companies individually to address data quality issues in a timely manner. The data presented in this report has been vetted by the Data Analytics Team and is therefore reliable and accurate, to the best of our knowledge. However, the validation process is ongoing, and all industry data remains subject to future corrections and updates.¹

Based on the validated industry data, the SFMTA tracks key metrics to measure the actual impact of the Pilot on the industry based on the goals of the program. To measure that impact, the analysis compares the data received during the Pilot to historical data from before the Pilot began. The historical data has undergone similar validation and remains subject to future corrections and updates. The Data Analytics Team primarily uses year-over-year comparisons to account for strong seasonality in the taxi industry but relies on short-term baseline comparisons to a period immediately preceding the Pilot if deficiencies in the long-term historical data make it necessary. For example, the taxi industry did not consistently report how a passenger requested a trip (i.e., hail type) prior to October 2022. Therefore, when analyzing hail type during the Pilot, October 2022 is used as the baseline period for comparison purposes. The staff has also compared the 2024-Q3 and 2024-Q4 data to previous quarters, understanding that seasonal differences between the quarters may impact results.

In addition, the SFMTA acknowledges that the impact of the Pilot on the industry may be affected by other contextual factors such as the easing of COVID-era restrictions or other SFMTA efforts to strengthen the industry like increasing the taxi meter rate. Staff take these factors into account and understand that there are likely multiple factors associated with the industry trends detailed below, in addition to the Pilot.

Pilot Goals and Metrics

Goals: Desired Outcomes

The SFMTA established key goals for the Pilot:

1. Improve taxi customer service by:
 - a. Offering upfront fare estimates and bookings through Taxi E-Hail apps
 - b. Relieving meter anxiety for customers by providing price certainty for taxi trips
 - c. Allowing customers to price shop for similar on-demand services

¹ This 2024-Q3 & Q4 Pilot report reflects minor corrections made to previously reported Pilot data as part of ongoing data quality review.

2. Increase taxi trips
3. Maintain a consistent level of service for traditional taxi trips, including Paratransit taxi trips
4. Increase the number of permitted taxi drivers offering service to the public
5. Ensure that Taxi Pilot Trip fares closely match the Taximeter rates

Metrics: Measuring Success

The SFMTA required Pilot participants to submit several types of data, including Taxi Pilot Trips and Third-Party Pilot Trips, driver fare income, and other relevant datasets to help measure the success of the Pilot in meeting the stated goals. Staff have also used the data to identify potential areas for improvement, assess participant compliance, and to update program criteria and processes. The metrics have been slightly revised from the original Pilot policy memo as described below.

Goal 1: Improve customer service

Metric 1A: Track the total number of Pilot trips

The total number of Pilot trips is a proxy for customer satisfaction. Staff track the total number of Taxi Pilot Trips and Third-Party Pilot Trips. This metric has changed slightly from the policy memo that established the Pilot. Staff updated the original metric, Increase E-Hail App Trips by 10%, because not all Taxi E-Hail App providers joined the Pilot at its inception and the intent of this metric is to track satisfaction with the Pilot. Therefore, the metric was updated to track the total number of Pilot trips, which provides a more targeted proxy measure of customer satisfaction. Based on feedback from the taxi industry, staff also report the total number of Taxi E-Hail App trips, which was added to Metric 3A.

Metric 1B: Complaints

The SFMTA tracks the number of complaints by taxi drivers and customers regarding Pilot trips. Staff also track the total number of complaints, comparing the number received prior to the Pilot's launch and the number received during the Pilot term.

Metric 1C: Geographic Distribution of Pilot trips

Analyzing the geographic distribution of Pilot trips was not initially an official Pilot metric, although the SFMTA tracked and reported on the geographic expansion of taxi service within the city as a measure of the Pilot's impact on customer service starting with 2023-Q3. Specifically, the SFMTA created a heat map that displayed the geographic distribution of Third-Party Trips compared to non-Pilot taxi trips.

Starting in year 2 of the Pilot, the SFMTA began tracking the impact of the Pilot on the distribution of taxi pickup locations by comparing the geographic distribution of Third-Party Trips with non-Pilot taxi trips by hail type. In order to conduct this analysis, the SFMTA identified a Core Service Area and a Peripheral Service Area. The Core Service Area, where the majority of taxi pickups occur, covers downtown neighborhoods north of Folsom Street to Fisherman's Wharf, Western Addition, Hayes Valley, and the Mission. The Peripheral Service Area covers all other areas of the city. Staff measured and tracked taxi pickups in the Peripheral Service Area compared to pickups throughout San Francisco. While there is not a specific target for trip distribution, this comparison helps illustrate how the Pilot is affecting the geographic distribution of taxi trips.

Metric 1A: Total Number of Pilot Trips

Pilot Overview

- In Pilot Year 1, riders took 158,768 Pilot Trips.
- In Pilot Year 2, riders took 350,908 Pilot Trips, an increase of 121%.

2024-Q3 & Q4 Analysis

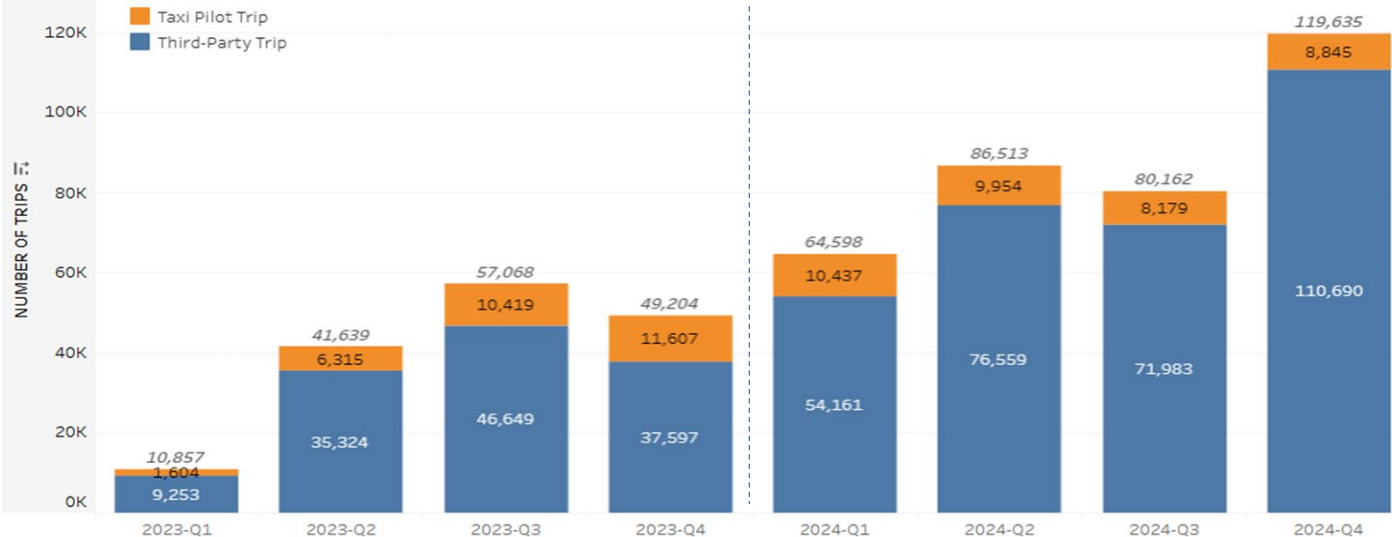
There were 80,162 total Pilot trips in 2024-Q3, 10.2% (8,179) of which were Taxi Pilot Trips and 89.8% (71,983) were Third-Party Trips. Total Pilot trips decreased by 7.3% in 2024-Q3 compared to 2024-Q2 but increased 40% from the same period of the prior year, 2023-Q3. Total Pilot trips in 2024-Q3 increased by 638% when compared to 2023-Q1, which saw 10,857 Pilot trips. These comparisons are shown in Figure 1 below.

Taxi Pilot Trips in 2024-Q3 decreased 17.8% from the previous quarter when 9,954 Taxi Pilot Trips were completed. There was also a decline in Third-Party Trips from 76,559 to 71,976, representing a decrease of 6% from the prior quarter (2024-Q2).

In November 2024, Curb and Arro began providing Third-Party Trips, and the impact of their participation is evident in the trip numbers. 2024-Q4 saw a significant increase in total Pilot trips with 119,635, 7.4% (8,845) of which were Taxi Pilot Trips and 92.5% (110,690) of which were Third-Party Trips. Total Pilot trips increased by 49% in 2024-Q4 compared to 2024-Q3 and increased 143% from the same period of the prior year, 2023-Q4. Total Pilot trips in 2024-Q4 increased by 1001.9% when compared to 2023-Q1, which saw 10,857 Pilot trips. These comparisons are shown in Figure 1 below.

Taxi Pilot Trips in 2024-Q4 increased 8% from the previous quarter when 8,179 Taxi Pilot Trips were completed. There was also an increase in Third-Party Trips from 71,983 to 8,845, representing an increase of 53.8% from the prior quarter (2024-Q3).

Figure 1: Total Pilot Trips 2023-Q1 to 2024-Q4



Metric 1B: Complaints

The SFMTA tracked the number of complaints by taxi drivers and customers regarding Pilot trips and the overall number of complaints to monitor potential impacts on service delivery. Staff paid particular attention to complaints about response times. Most taxi complaints are filed through 311, but SFMTA staff also receive and investigate complaints that are filed through email, over the phone and in person at the Taxi Window at 1 South Van Ness.

Pilot Overview

- In Pilot Year 1, there were 0.11 complaints per 1,000 trips.
- In Pilot Year 2, there were 0.15 complaints per 1,000 trips.

2024-Q3 & Q4 Analysis

As with other Pilot metrics, to account for potential impacts due to seasonality, SFMTA compared complaints during 2024-Q3 with the same period from the prior year, along with comparisons to the immediate prior quarters. Additionally, to account for the difference in total taxi trips, staff analyzed complaints per 1,000 trips to provide a more accurate comparison.

Table 1: Taxi Complaints per 1,000 Trips

	December - February			March - May			June - August			September -November		
	Before Pilot	2023-Q1	2024-Q1	Before Pilot	2023-Q2	2024-Q2	Before Pilot	2023-Q3	2024-Q3	Before Pilot	2023-Q4	2024-Q4
Avg	0.07	0.08	0.15	0.12	0.08	0.1	0.09	0.13	0.19	0.13	0.16	0.15

With an average of 0.19 complaints per 1,000 trips, taxi complaints in 2024-Q3 were slightly higher than the complaint rates during the same three-month period (2023-Q3) from the prior year (0.13 complaints per 1,000 taxi trips) and increased from 0.1 complaints per 1,000 trips during the previous quarter (2024-Q2).

In 2024-Q4, with an average of 0.15 complaints per 1,000 trips, taxi complaints in 2024-Q4 are slightly lower than the complaint rates found during the same three-month period (2023-Q4) from the prior year (0.16 complaints per 1,000 taxi trips) and decreased from 0.04 complaints per 1,000 during the previous quarter (2024-Q3).

Staff also separately analyzed complaints regarding taxi driver response times, and as shown in Table 2 below, they remained consistent with the same period of the prior year.

Table 2: Taxi Driver Response Time Complaints per 1,000 Trips

	December - February			March - May			June - August			September -November		
	Before Pilot	2023-Q1	2024-Q1	Before Pilot	2023-Q2	2024-Q2	Before Pilot	2023-Q3	2024-Q3	Before Pilot	2023-Q4	2024-Q4
Avg	0.04	0.05	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.003	0.005

The SFMTA also tracks paratransit taxi complaints, paying close attention to complaints received about response times, which would indicate paratransit taxi customers are waiting longer for taxi trips. Thus far, there have been no complaints filed about paratransit taxi response times.

Table 3: Paratransit Taxi Complaints per 1,000 Trips

	December - February			March - May			June - August			September - November		
	Before Pilot	2023-Q1	2024-Q1	Before Pilot	2023-Q2	2024-Q2	Before Pilot	2023-Q3	2024-Q3	Before Pilot	2023-Q4	2024-Q4
Avg	0.14	0.12	0.10	0.13	0.11	0.06	0.15	0.14	0.13	0.13	0.07	0.19

There was not a notable change in the rate of paratransit taxi complaints throughout the course of the Pilot, as indicated in Table 3 above. There were minimal changes from quarter to quarter. It is unlikely that the Pilot impacted the number or type of complaints for taxi trips or paratransit taxi trips since Pilot trips were a small percentage of overall taxi trips, and many exogenous factors could impact taxi complaints. However, it was still an important metric to track.

Metric 1C: Geographic Distribution of Pilot Trips

The SFMTA uses trip pick-up locations to determine the geographic distribution of taxi service. The SFMTA measured the expansion of service by comparing the geographic distribution of pick-up locations for Third-Party Pilot Trips with non-Pilot taxi trips.

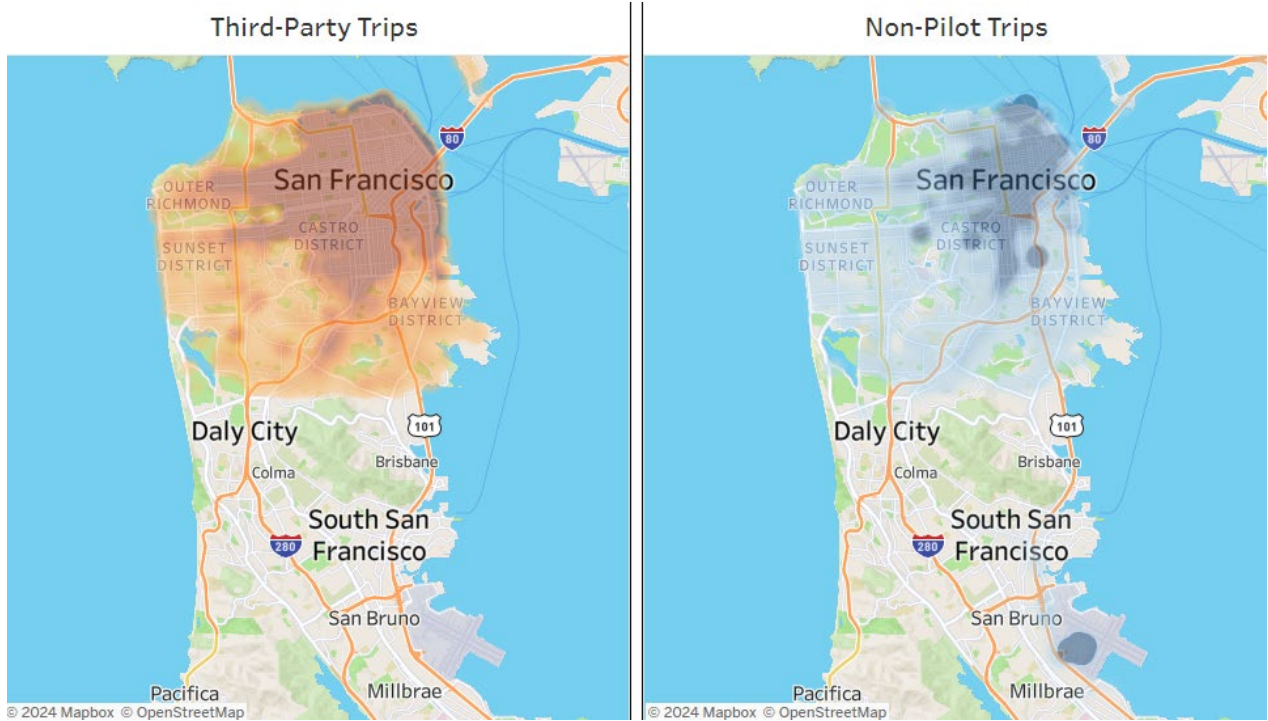
Pilot Overview

- In Year 1 of the Pilot, 40.3% of Third-Party Pilot Trips had a pick-up location in the Peripheral Service Area, compared to 31.25% of non-Pilot taxi trips.
- In Year 2 of the Pilot, 39.4% of Third-Party Pilot Trips had a pick-up location in the Peripheral Service Area, compared to 32.9% of non-Pilot taxi trips.

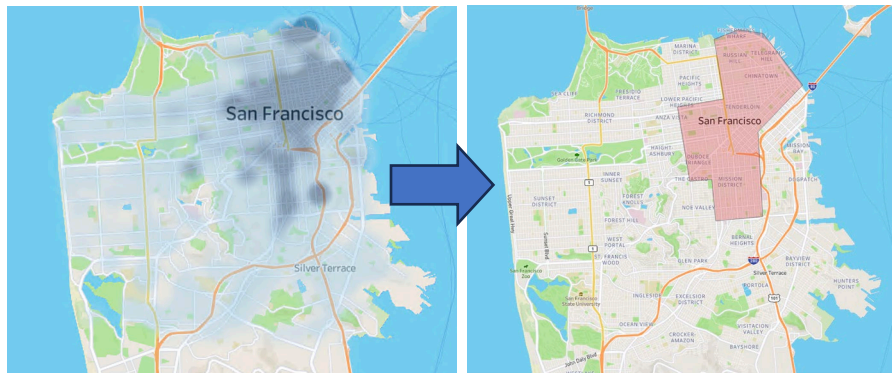
2024-Q3 & Q4 Analysis

The spatial comparison in Figure 2 shows that Third-Party Trips have expanded the density of pickups to outer neighborhoods where taxi service has historically been less dense. The heat map for non-Pilot taxi trips only (not including Third-Party Pilot Trips) highlights the concentration of taxi service in the downtown area and at the airport. By contrast, the heat map for Third-Party Pilot Trips displays a much more even geographic distribution throughout the city.

Figure 2: Spatial Distribution of Trip Pick-Up Locations during 2024-Q3 and 2024-Q4

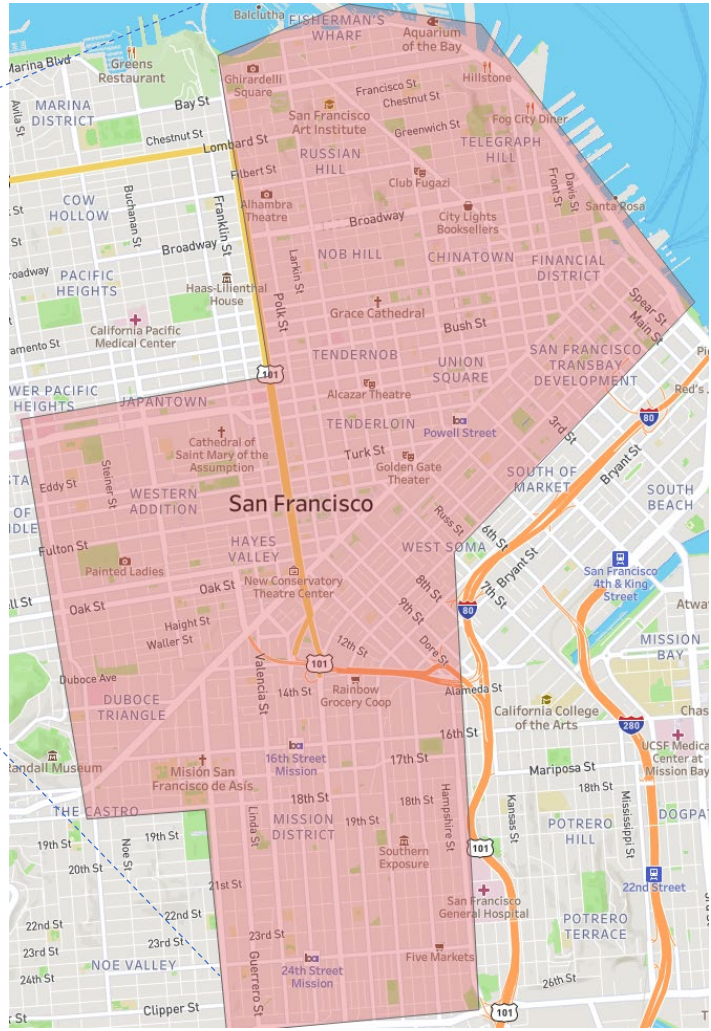


The maps below show the Core Service Area and Peripheral Service Area.



Core Service Area

The Core Service Area is defined as the area within the city of San Francisco where the highest concentration of taxi pickups occurs, excluding airport pickups.



▲ Peripheral Service Area
 The Peripheral Service Area is designated as the area located outside of the Core Service Area, but within the city of San Francisco.

- Peripheral Service Area
- Core Service Area

Table 4: Percentage of Pickups in the Peripheral Service Area by Hail Type

	Overall Periphery Pct	Third Party Periphery Pct	Non-Third Party Periphery Pct	Street Periphery Pct	Dispatch Periphery Pct	E-Hail Periphery Pct
2023-Q1	31.1%	45.0%	30.7%	20.0%	38.2%	34.3%
2023-Q2	31.5%	41.3%	30.5%	20.3%	38.7%	34.5%
2023-Q3	30.9%	36.8%	30.2%	20.5%	38.9%	34.0%
2023-Q4	30.8%	37.9%	30.0%	19.2%	39.6%	36.8%
2024-Q1	32.3%	39.1%	31.1%	20.8%	39.7%	36.6%
2024-Q2	34.1%	39.0%	33.0%	23.5%	40.2%	37.4%
2024-Q3	33.4%	38.2%	32.3%	22.6%	39.7%	34.9%
2024-Q4	35.5%	41.3%	33.5%	23.6%	40.5%	35.8%

Table 4 shows the percentage of trip pickups in the Peripheral Service Area overall and by hail type. Pickups in the Peripheral Service Area made up a higher proportion of Third-Party Trips than non-Third-Party Trips. Therefore, Third-Party Trips increase the geographic distribution of taxi trips in San Francisco.

Figure 3: Number of Trips in Peripheral Service Area by Hail Type

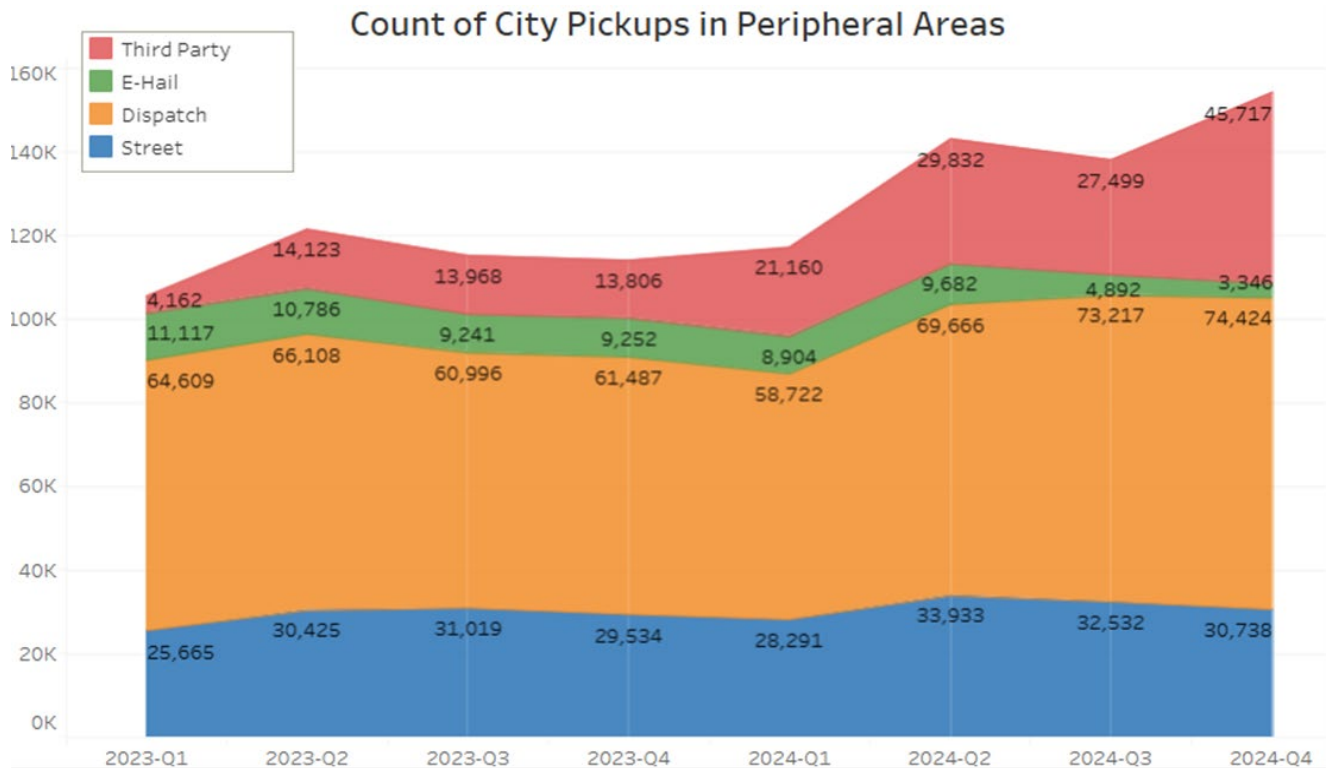


Figure 3 above shows that in 2024-Q3, Third-Party Trips in the Peripheral Service Area totaled 27,497, a slight decrease from 2024-Q2, and trips in the Peripheral Service Area by E-Hail and Street pick-up experienced declines as well. Dispatch trips in the Peripheral Service Area, however, increased from the previous quarter.

In the Peripheral Service Area, the number of Third-Party trips grew significantly from 46,059 in Pilot Year 1 to 124,208 in Pilot Year 2, a 169.6% increase.

In 2024-Q4, Third-Party Trips in the Peripheral Service Area totaled 45,717, a 66% increase from 2024-Q3. Trips in the Peripheral Service Area by E-Hail and Street pick-up experienced declines. Dispatch trips in the Peripheral Service Area, however, increased slightly from the previous quarter.

Goal 2: Increase taxi trips

Metric 2A: Increase total taxi trips by 10%

The SFMTA tracked the total number of taxi trips provided during the Pilot term and compared the figure to the total number of taxi trips provided prior to the Pilot, with a goal of increasing total taxi trips by 10%.

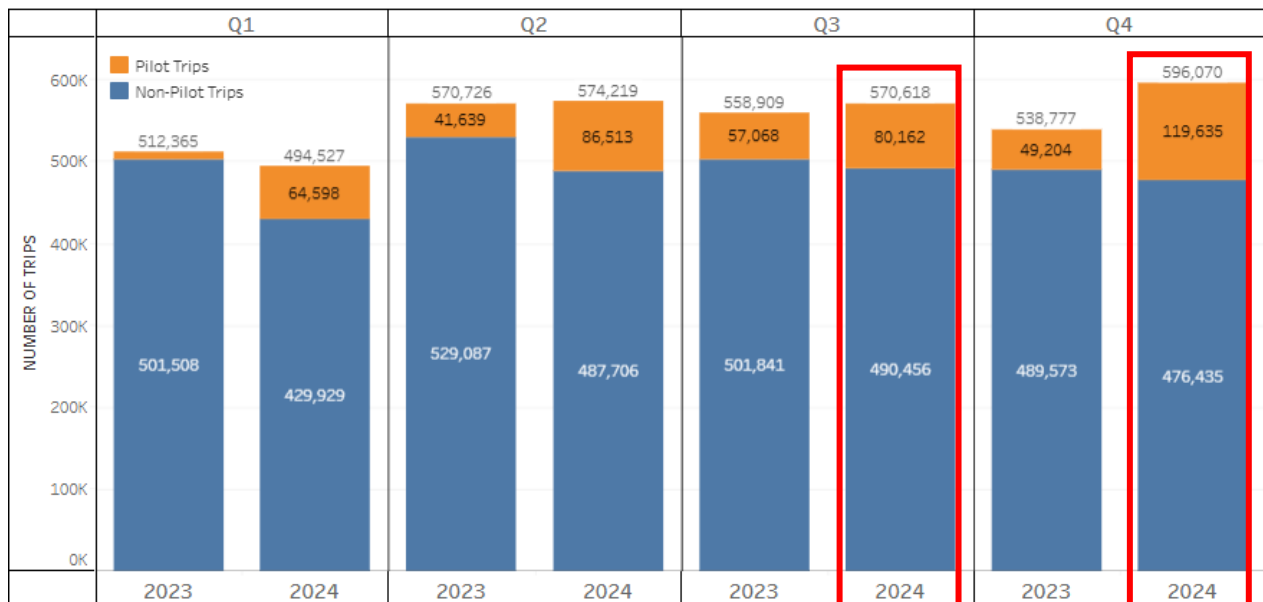
Pilot Overview

- Taxi customers took 2,189,777 total taxi trips in Pilot Year 1 and 2,354,340 total taxi trips in Pilot Year 2.
- Total taxi trips increased by 27.3% from the quarter before the Pilot to 2024-Q4.

2024-Q3 & Q4 Analysis

Increasing the total number of taxi trips is a key goal for the SFMTA, particularly since the number of taxi trips significantly declined after Transportation Network Companies (TNCs) began operations in San Francisco. There were further taxi trip reductions during the COVID-19 pandemic, which severely impacted taxi trip demand, reducing trip volumes by 70% on average. The SFMTA views an increase in the total number of taxi trips as indicative of the Pilot’s positive impact on the taxi industry and future growth. The total number of taxi trips includes all taxi trips in the SF market, including all Pilot trips (Taxi Pilot Trips and Third-Party Pilot Trips) and non-Pilot taxi trips. To account for strong seasonality in the industry, a year-over-year comparison provides a more “apples to apples” comparison of the change in taxi trips, although staff also has analyzed the total taxi trips in quarter over quarter, too. Comparing quarter over quarter helps provide a picture of the change in trips during the Pilot term, with the caveat that some of the fluctuation can be attributed to external factors such as seasonality. Staff also acknowledge that other contextual factors, in addition to the Pilot, may influence the change in total taxi trips.

Figure 4: Total Taxi Trips



* Note: As part of the ongoing data validation process, staff found errors with the trip count from 2023-Q1, and Figure 4 has been updated to reflect the corrected figure (corrected from 511,560 in prior reports to 512,365). All future reports will use the corrected figure for 2023-Q1.

Taxi trips increased from 2,189,777 in Pilot Year 1 (2023) to 2,354,340 in Pilot Year 2 (2024), indicating a year-over-year growth in overall taxi activity during the Pilot period.

As Figure 4 above shows, total taxi trips increased 2% when comparing 2024-Q3 to the same quarter of the prior year (570,618 compared to 558,909). Though total taxi trips declined each quarter from 2023-Q3 to 2024-Q1, there was a rebound in 2024-Q2. However, taxi trips slightly decreased in 2024-Q3.

The year-over-year number of trips between 2023-Q4 and 2024-Q3 (2,178,129 trips in 12 months) decreased by 2.6% when compared to the same period from the previous year (2,236,136 trips in 12 months). The decrease in total taxi trips from 2023-Q4 through 2024-Q3 may be attributed to macro trends in San Francisco, such as the slow economic recovery from the pandemic. Staff will continue to monitor and work to understand the variety of factors that play a role in taxi trip trends.

In 2024-Q4, there was a rebound with 596,070 total taxi trips. Total taxi trips increased by 27.3% from the quarter before the Pilot to 2024-Q4 (from 467,754 to 596,070), which is well over the target of 10%. This increase was likely due to the addition of Third-Party Trips provided by Curb and Arro starting in November 2024. Trips increased by 10.6% in 2024-Q4 in comparison to the same quarter of the prior year (596,070 compared to 538,777). Additionally, total taxi trips in 2024-Q4 increased 4.5% from the previous quarter (596,070 compared to 570,618 in 2024-Q3).

The year-over-year number of trips between 2024-Q1 and 2024-Q4 (2,235,434 trips in 12 months) increased by 2.5% when compared to the same period from the previous year (2,180,777 trips in 12 months).

Goal 3: Maintain a consistent level of service for traditional taxi trips, including Paratransit taxi trips

Metric 3A: Taxi trips by hail type

The SFMTA assessed the impact of Third-Party Pilot Trips on traditional taxi trips, including street hails and phone dispatch trips, by analyzing the distribution of trips by hail type before and during the Pilot term. In addition to reporting the relative distribution of trips by hail type, this section also includes the total number of trips by hail type, including the number of Taxi E-Hail App trips.

Metric 3B: Paratransit taxi trips

Staff analyzed the relative proportion of paratransit taxi trips to all taxi trips before and during the Pilot term to help assess potential impacts of the Pilot.

Metric 3A: Taxi Trips by Hail Type

Pilot Overview

- Third-Party Pilot Trips increased from 7% of total taxi trips at the end of Year 1 of the Pilot to 18.6% by the end of Year 2.
- In Year 1 of the Pilot, street hails remained consistent, while phone dispatch and taxi E-Hail trips decreased slightly. Street hails, dispatch hails and e-hails all decreased slightly over the course of Year 2.

2024-Q3 & Q4 Analysis

SFMTA tracked the distribution of trips by hail type as a measure of the Pilot’s impact on customer service in the industry, particularly on the level of service for traditional taxi trips. Hail type refers to the method used by the customer to request a ride. There are three main methods for hailing a taxi in San Francisco: street trips are those hailed by hand on the street; dispatch trips are those requested through a phone call or website; and e-hail trips are those hailed through one of the approved Taxi E-Hail Apps. Street and dispatch trips are both considered traditional taxi service trips that many customers continue to rely on. E-hail is a relatively new option that makes it easier for customers to hail a nearby taxi on their smart phones without the need to flag the vehicle down in the street or speak with a phone dispatch operator. In addition, the Pilot has introduced a fourth method for hailing taxis through apps operated by approved third-party entities. Staff measures change by comparing the distribution during the Pilot to the last full month before the Pilot began (October 2022).

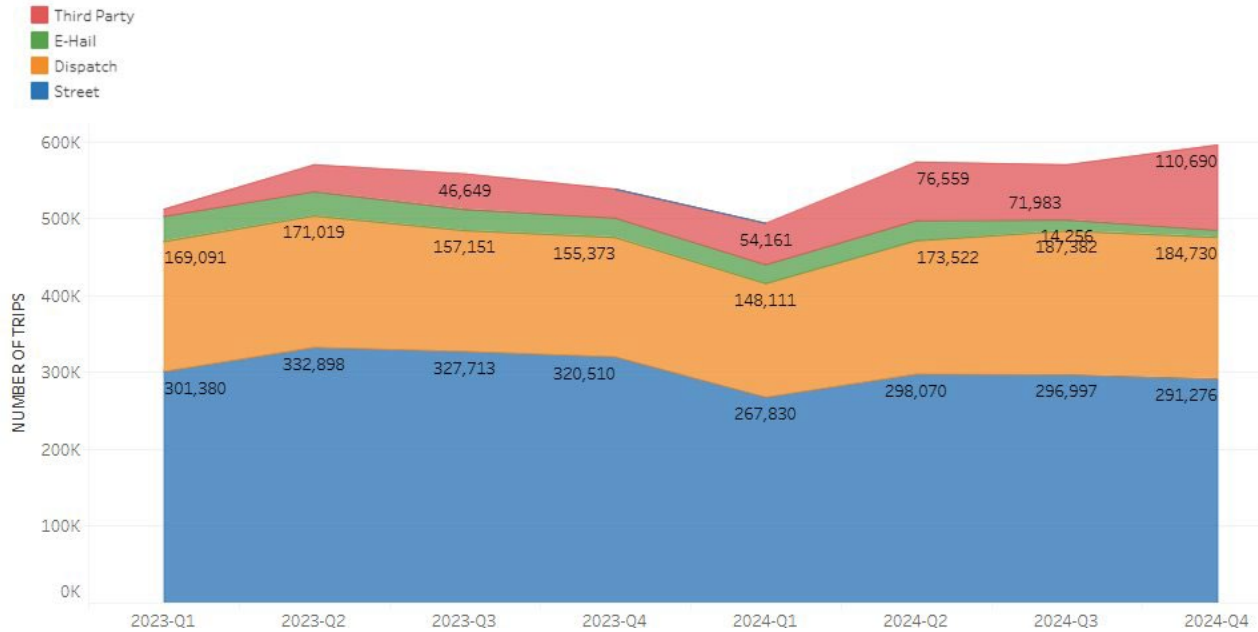
Table 5: Percentage of Trips by Hail Type

	Street Hails	Dispatch Hails	E-Hails	Third-Party Hails
Baseline (October 2022)	62.3%	31.1%	6.6%	-
2023-Q1	58.8%	33.0%	6.4%	1.8%
2023-Q2	58.3%	30.0%	5.5%	6.2%
2023-Q3	58.6%	28.1%	4.9%	8.3%
2023-Q4	59.5%	28.8%	4.7%	7.0%
2024-Q1	54.2%	30.0%	4.9%	11.0%
2024-Q2	51.9%	30.2%	4.5%	13.3%
2024-Q3	52.0%	32.8%	2.5%	12.6%
2024-Q4	48.9%	31.0%	1.6%	18.6%

Third-Party Pilot Trip hails increased in each previous quarter of the Pilot before slightly decreasing in 2024-Q3, street hails remained consistent in the first year of the Pilot and decreased slightly to a consistent lower level in the second year of the pilot, phone dispatch trips slightly increased in 2024-Q3, and E-hail trips decreased in 2024-Q3.

In 2024-Q4, Third-Party Pilot Trip hails increased to 18.6% of trips, the largest proportion of Third-Party Trips up to that point. 2024-Q4 saw both Curb and Arro begin providing trips through the Pilot program, which may account for this level of Third-Party hails. The rate of Street Hails and E-Hails saw a small decline, while Dispatch Hails remained consistent.

Figure 5: Number of Taxi Trips by Hail Type



Metric 3B: Paratransit Taxi Trips

Pilot Overview

- The proportion of Paratransit Taxi Trips out of Total Taxi Trips remained stable throughout the Pilot, ranging from 11.8% to 12.5% in Year 1 and 12.8% to 13.5% in Year 2.

2024-Q3 & Q4 Analysis

The SFMTA tracked the proportion of paratransit taxi trips of total taxi trips as a measure of the Pilot's impact on the paratransit taxi service. To measure change in paratransit taxi service over time and account for industry seasonality staff compared paratransit taxi trips as a percentage of all taxi trips during the Pilot to a six-month baseline period before the Pilot began (May-October 2022).

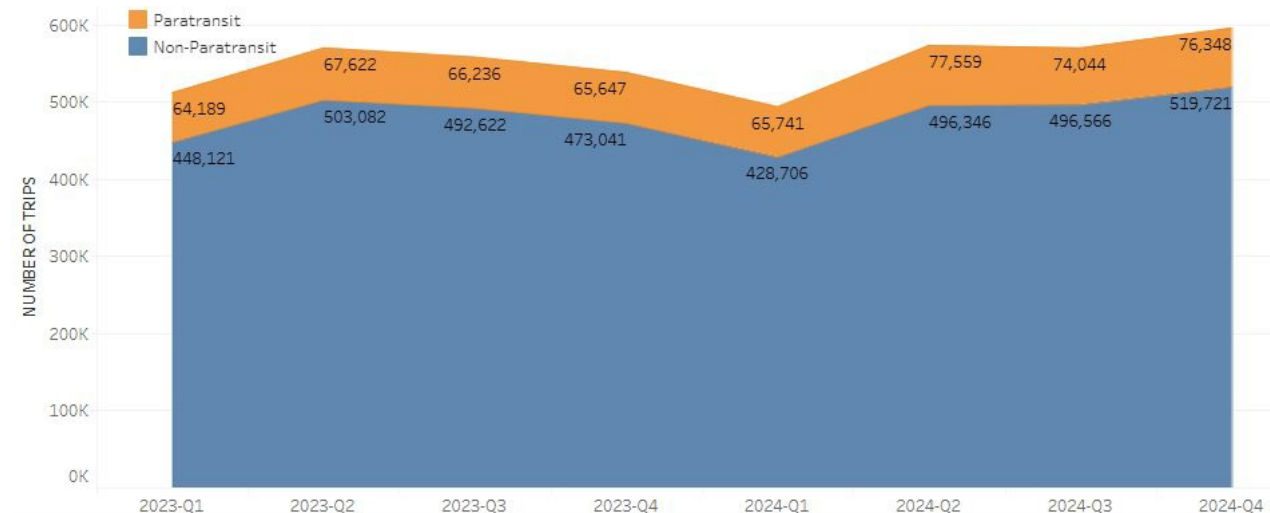
During 2024-Q3 of the Pilot, paratransit taxi trips accounted for 13.0% of all taxi trips (74,044 trips as compared to 496,566). This represents a slight increase in the proportion of trips from 2023 (which varied from 11.8% to 12.5%). This proportion is also higher than the baseline percentage of 11.6%.

During 2024-Q4 of the Pilot, paratransit taxi trips accounted for 12.8% of all taxi trips (76,348 trips as compared to 519,721). As noted above, this represents a slight increase in the proportion of trips from 2023 (which varied from 11.8% to 12.5%). This proportion is also higher than the baseline percentage of 11.6%.

Table 6: Proportion of Paratransit Taxi Trips compared to Non-Paratransit Taxi Trips

	Paratransit Taxi Trips	Non-Paratransit Taxi Trips
Baseline (October 2022)	11.6%	88.4%
2023-Q1	12.5%	87.5%
2023-Q2	11.8%	88.2%
2023-Q3	11.9%	88.1%
2023-Q4	12.2%	87.8%
2024-Q1	13.3%	86.7%
2024-Q2	13.5%	86.5%
2024-Q3	13.0%	87.0%
2024-Q4	12.8%	87.2%

Figure 6: Number of Paratransit Taxi Trips compared to Non-Paratransit Taxi Trips



The proportion of paratransit taxi trips as compared to total taxi trips remained largely consistent throughout the periods both before and after the start of the Pilot. Staff interpret consistency as an indication that the Pilot has not had a significant impact on the level of service provided to paratransit taxi customers during the Pilot term.

Goal 4: Increase taxi driver fare revenue

Metric 4A: Increase participating taxi driver fare revenue by 10%

The SFMTA monitored driver fare revenue to understand the Pilot’s impact on driver income. The SFMTA has updated this metric to clarify that the increase in taxi driver fare revenue is specific to drivers who participate in the Pilot. Although this metric covers participating drivers to assess the impact of the Pilot, the SFMTA has also reported on revenue for all drivers.

Fare revenue is the base amount charged to the customer for a trip, excluding tip, airport fees, baggage fees, out-of-town fees, tolls, and any other associated fees. These additional customer costs are not reported to SFMTA consistently enough to generate reliable data and therefore are not included in our

analysis. Fare revenue also excludes any calculation of color scheme or other- operational fees, such as those charged by the app provider or Third-Party Pilot app.

Although fare revenue is not equivalent to the final amount received by the driver, it is the most reliable indicator of driver revenue available to the SFMTA given current data reporting protocols. To account for industry seasonality, the SFMTA measured the change in fare revenue by comparing the analyzed quarters to the same periods of the prior year and the prior Pilot periods. The SFMTA also tracks the amount of fare revenue that drivers earned from Pilot trips compared to non-Pilot trips.

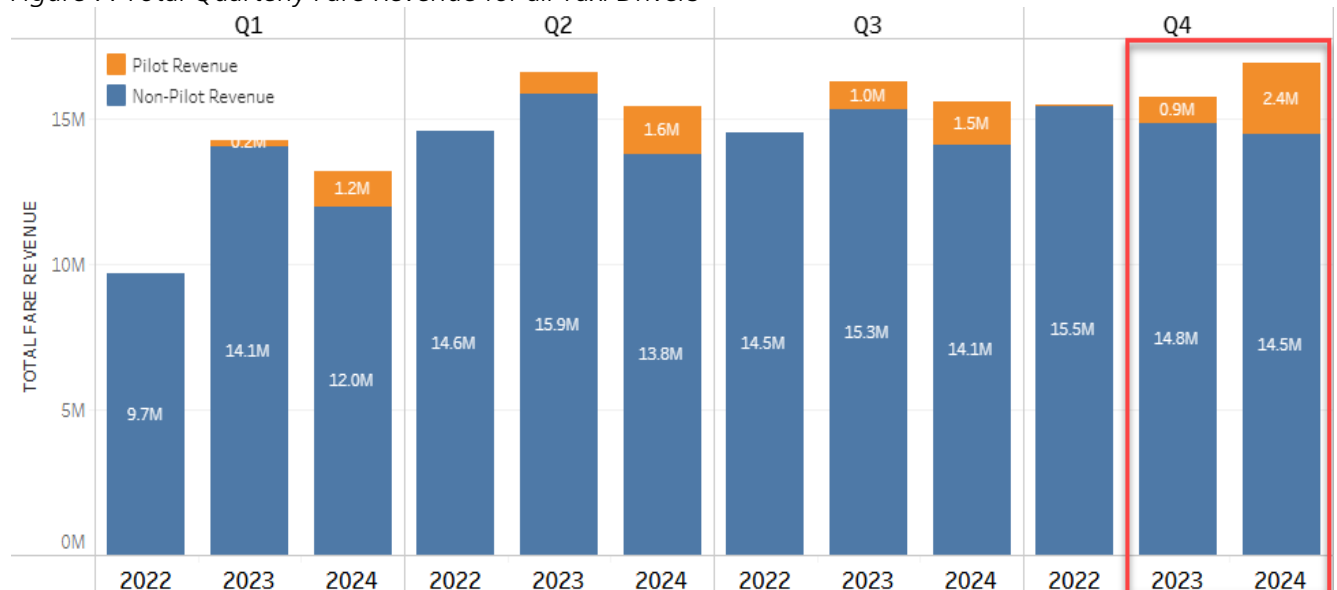
Pilot Overview

- In Year 1, the total fare revenue generated from the Pilot was \$2.85 million. In Year 2, the total fare revenue generated from the Pilot was \$6.81 million, for a total of \$9.66 million.
- In Year 1, total fare revenue (non-Pilot plus Pilot fare revenue) for all taxi drivers was \$62.95 million. In Year 2, the total fare revenue for all taxi drivers was \$61.17 million. Both Pilot years saw significant increases in total fare revenue for all taxi drivers as compared to 2022, the year before the Pilot began, when drivers made \$54.3 million.

2024-Q3 & Q4 Analysis

Results show that total quarterly fare revenue (non-Pilot plus Pilot fare revenue) for all taxi drivers decreased during 2024-Q3 of the Pilot as compared to 2023-Q3, but increased during 2024-Q4 as compared to 2023-Q4. The 2024-Q3 Pilot fare revenue was \$1.48M, which is 9.5% of the total fare revenue (\$15.6M). The 2024-Q4 Pilot fare revenue was \$2.45M, which is 14.5% of the total fare revenue (\$16.93M).

Figure 7: Total Quarterly Fare Revenue for all Taxi Drivers



To understand the impact of the Pilot on driver fare revenue, the SFMTA clarified Metric 4A and included an analysis of participating drivers as compared to non-participating drivers.

Figure 8: Average Quarterly Driver Revenue for Pilot and Non-Pilot Drivers



Participating drivers earned more on average than non-participating drivers for each quarter of 2023. During 2023-Q4, participating drivers earned 15.9% more on average than non-participating drivers. Additionally, drivers who provided Third-Party Trips earned 30.5% more on average (\$18,123.28) in 2023-Q4 than drivers who did not provide Pilot trips (\$13,883.83). Drivers who provided Third-Party Pilot Trips earned an average of \$1,641 per month in 2023-Q4 from those trips alone, which represents a 50.1% increase from 2023-Q1 (\$1,093).

Figure 8 above shows that for each quarter of the Pilot, participating drivers earned more on average than non-participating drivers from the combination of both Pilot and non-Pilot taxi trips. During 2024-Q3, participating drivers earned 2.8% more on average than non-participating drivers. Additionally, drivers who provided Third-Party Trips earned 12.6% more on average (\$15,904) in 2024-Q3 than drivers who did not provide Pilot trips (\$14,130). Drivers who provided Third-Party Pilot Trips earned an average of \$2,061 per month in 2024-Q3 from those trips alone, which represents an 88.6% increase from 2023-Q1 (\$1,093). Additionally, Figure 8 shows that average fare revenue per driver increased for both Pilot and non-Pilot drivers in 2024-Q2 before slightly declining in 2024-Q3, a possible seasonal trend as 2023 saw a similar decrease from Q2 to Q3.

The same finding holds true for data from 2024 Q-4, with participating drivers earning more on average than non-participating drivers from the combination of both Pilot and non-Pilot taxi trips. During 2024-Q4, participating drivers earned 25.9% more on average than non-participating drivers. Additionally, drivers who provided Third-Party Trips earned 29.09% more on average (\$17,999) in 2024-Q3 than drivers who did not provide Pilot trips (\$13,438). Drivers who provided Third-Party Pilot Trips earned an average of \$2,474 per month in 2024-Q4 from those trips alone, which represents a 126.3% increase from 2023-Q1 (\$1,093). Additionally, Figures 7 and 8 show that though average fare revenue per driver increased for Pilot and decreased for non-Pilot drivers in 2024-Q4, revenue increased for both groups in 2024-Q4.

Some taxi industry members have expressed concerns regarding the fee charged to drivers by Uber for the Third-Party Trips. As with Uber’s passenger fares, the driver fees are dynamic, and this has been an area of concern for the taxi industry, because the fee structure for the taxi industry is not dynamic. The weighted average fee charged to drivers was 18.33% of the customer fare during 2024-Q3 and 13.1% during 2024-Q4. In 2023-Q4, in the first year of the Pilot, this weighted average fee charged to drivers

was 21.7% of the customer fare. To provide taxi drivers with full transparency regarding their potential earnings for servicing a Third-Party Pilot Trip, taxi drivers can see the pick-up and drop-off locations and the amount they will earn for that trip prior to accepting the trip. The taxi driver can then make an informed decision about servicing each specific Third-Party Trip.

Goal 5: Increase the number of taxi drivers

Metric 5A: Increase the number of active taxi drivers in service

Active drivers in service are defined as drivers who provided at least one trip during the analysis period. Tracking the number of active drivers in service helped SFMTA assess whether more drivers were actively working during the Pilot term than previously. While there are many factors external to the Pilot that may impact this metric, it was important for the SFMTA to track this metric as one measure of the Pilot's success.

Metric 5B: Increase the number of new taxi drivers

The SFMTA tracked the number of taxi drivers, assessing for an increase in the total driver pool. Staff assumed that an increase in the number of drivers may be a result of opportunities to increase driver revenue. However, in developing Pilot metrics the SFMTA noted that national labor issues and other factors outside of the SFMTA's sphere of influence could also impact the number of new drivers. Therefore, there was not a specific target for this metric, but changes in the number of drivers during the Pilot were tracked.

Metric 5C: Number of drivers participating in the Pilot

The SFMTA added this metric to track the number of drivers participating in the Pilot, as another targeted assessment of the impact of the Pilot.

Metric 5A: Increase the number of active taxi drivers

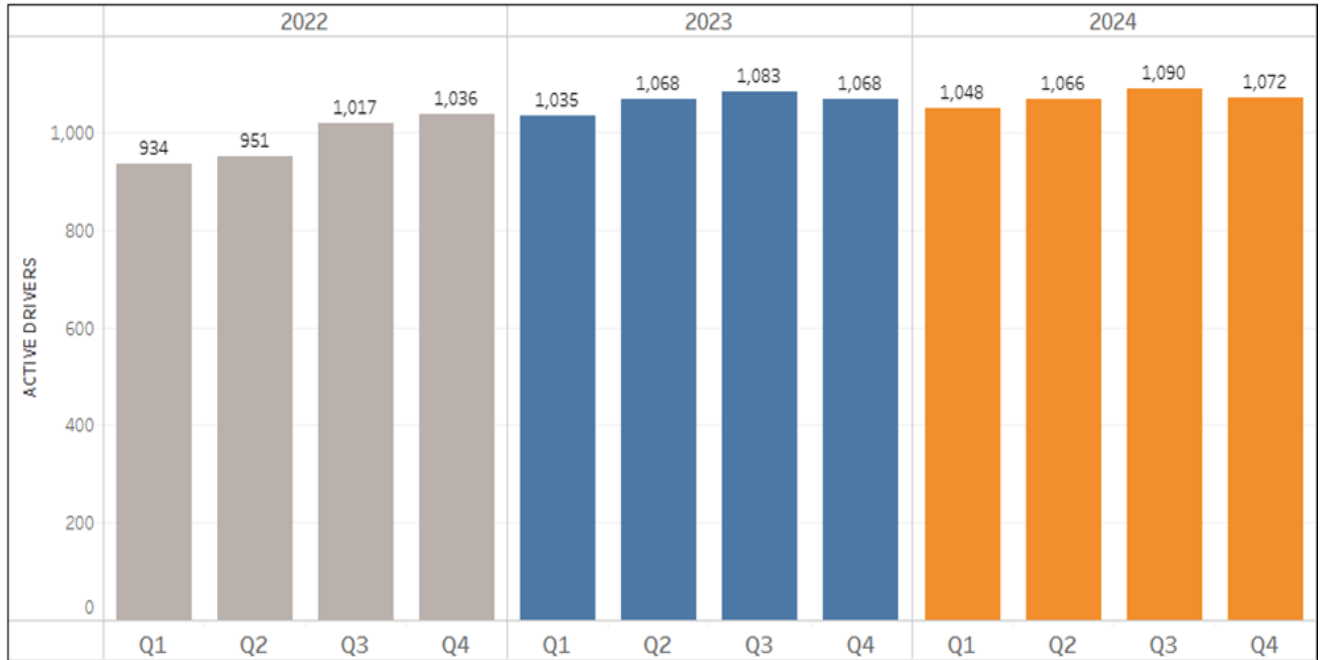
Pilot Overview

- There were 1,068 active taxi drivers in Year 1 and 1,072 in Year 2, an increase from the 1,036 active drivers in 2022, the year before the Pilot.

2024-Q3 & Q4 Analysis

With the exception of 2024-Q2, the number of active drivers increased during each quarter of the Pilot as compared to the same period during the previous year. The total number of active drivers during 2024-Q3 was 1,090, a 0.65% increase from the number of active drivers over the same three-month period during the previous year (1,083). The total number of active drivers during 2024-Q4 was 1,072, a 0.4% increase from the number of active drivers over the same period during the previous year (1,068).

Figure 9: Active Drivers per Quarter



Metric 5B: Increase the number of new taxi drivers

Pilot Overview

- In Year 1 of the Pilot, 198 new taxi drivers were permitted. In Year 2 of the Pilot, 142 new taxi drivers were permitted. These numbers compare favorably to prior years, as 135 new drivers were permitted in 2022, and only 22 new drivers were permitted in 2021.

2024-Q3 & Q4 Analysis

The number of new taxi drivers has jumped significantly over the past several years. The SFMTA issued 142 permits (A-Cards) to new taxi drivers in 2024.

Table 7: New Taxi Drivers by Calendar Year

Year	2018	2019	2020	2021	2022	2023	2024
New Taxi Drivers	43	33	23	22	135	198	142

Despite this overall increase, the number of new drivers in 2024-Q3 and 2024-Q4 decreased from the same period of the prior year.

Table 8: New Taxi Drivers per Quarter

	December - February			March - May			June - August			September - November		
	Before Pilot	2023-Q1	2024-Q1	Before Pilot	2023-Q2	2024-Q2	Before Pilot	2023-Q3	2024-Q3	Before Pilot	2023-Q4	2024-Q4
Total	11	65	35	18	52	30	38	59	32	58	38	34

Metric 5C: Number of drivers participating in the Pilot

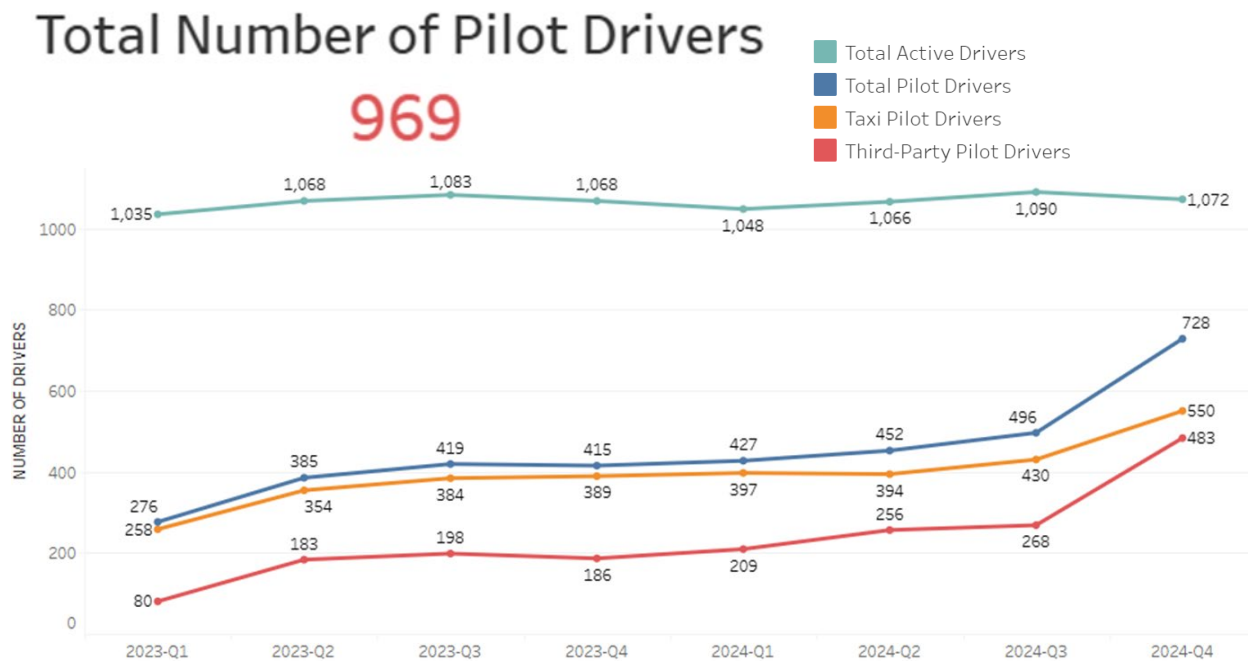
Pilot Overview

- By the end of Year 1, 415 drivers were participating in the pilot; by the end of Year 2, that number grew to 728.

2024-Q3 & Q4 Analysis

The number of drivers participating in the Pilot has increased each quarter. The number of drivers who provided Pilot trips increased by 79.7% from 2023-Q1 (276) to 2024-Q3 (496). This continued to rise, reaching 728 in Q4 2024, a 163.8% total increase.

Figure 10: Driver Participation in the Pilot 2023-Q1 – 2024-Q4



This metric represents the total number of drivers who participated in the Pilot from the first quarter through the most recent quarter. Total Active Drivers: drivers that have provided at least one taxi trip of any kind. Total Pilot Drivers: drivers that have provided at least one Taxi Pilot or Third-Party Pilot Trip. Taxi Pilot Drivers: drivers that have provided at least one Taxi Pilot Trip; they may or may not have provided any Third-Party Pilot Trips. Third-Party Pilot Drivers: drivers that have provided at least one Third-Party Pilot Trip; they may or may not have provided any Taxi Pilot Trips.

Goal 6: Ensure that Taxi Pilot Trip fares closely match the Taximeter rates

Metric 6A: Taxi Pilot Trip fares should be within 10% of the Taximeter rate on average

The SFMTA assessed how closely the Taxi Pilot Trip fares match the estimated Taximeter rate for those trips. On average, Taxi Pilot Trip fares should be within 10% of the Taximeter.

Third-Party Pilot Trips were not required to adhere to Taximeter rates, but the SFMTA tracks how those fares compare to Taximeter rates on average, for informational purposes.

Metric 6A: Taxi Pilot Trip fare within 10% of the Taximeter rate on average

Pilot Overview

- In Year 1 of the Pilot, the average upfront fare was 4.2% below the estimated Taximeter rate, while in Year 2, it was 5.3% below the estimated Taximeter, with both years remaining well within the program's goal of 10%.

2024-Q3 & Q4 Analysis

During 2024-Q3, the average upfront fare (\$13.95) was 5.2% below the estimated average Taximeter fare (\$14.72), which is calculated by the SFMTA. This indicates that the Taxi Pilot fares were within the allowable 10% range.

During 2024-Q4 of the Pilot, the average upfront fare (\$14.03) was 6.4% below the estimated average Taximeter fare (\$14.98), which is calculated by the SFMTA. This indicates that the Taxi Pilot fares were within the allowable 10% range.

Table 9: Taxi Upfront Fare compared to the Estimated Meter Fare

	Avg Taxi Upfront Fare	Avg Estimated Taximeter Fare	% Different
2023-Q1	\$13.01	\$13.53	-3.80%
2023-Q2	\$14.22	\$14.83	-4.10%
2023-Q3	\$13.85	\$14.45	-4.10%
2023-Q4	\$14.49	\$15.18	-4.60%
2024-Q1	\$14.21	\$14.93	-4.80%
2024-Q2	\$14.30	\$14.99	-4.70%
2024-Q3	\$13.95	\$14.72	-5.20%
2024-Q4	\$14.03	\$14.98	-6.40%

During 2024-Q3, the average Third-Party fare was 2.3% lower than the average non-Pilot Taximeter fare when comparing similar trips, although average Third-Party Trip fares exceed average taxi fares from late afternoon through early morning hours. The fare difference decreased to 0.2% in 2024-Q4, with the average Third-Party fare slightly lower than the average non-Pilot Taximeter fare. To compare similar

trips, all trips originating at the San Francisco International Airport (SFO) or meeting the criteria for out-of-town trips have been excluded. This creates a reasonable comparison because Third-Party pick-ups are not allowed at SFO and the meter and a half rate (150% of the meter rate is allowed for out-of-town trips beyond 15 miles of the city) does not apply to Third-Party Trips.

Conclusion

Due to the promising outcomes of the Taxi Upfront Fare Pilot, the SFMTA Board made the program permanent in 2025. Throughout the Pilot, there were notable increases in the number of new taxi drivers and the number of drivers participating in the Pilot. During the Pilot, drivers who provided Third-Party Trips earned higher average fare revenue than drivers who did not participate in the program. As many drivers explained during public comment period for the Taxi Upfront Fare Program item at the SFMTA Board, and as the data bears out, the addition of Third-Party trips has provided an important new stream of trips and fare revenue to help address the decline in traditional taxi trips.

The SFMTA continues to update the Taxi Upfront Fare Program as new opportunities arise. After careful consideration, the SFMTA intends to adjust the program rules to allow Third-Party Wheelchair Accessible Vehicle (WAV) Trips. SFMTA staff discussed this change with a number of stakeholders, including the taxi industry and disability community. Recently, Uber submitted a petition to the California Public Utilities Commission (CPUC) requesting a rule change to allow a Third-Party to transfer WAV trip requests to ramp taxis under the TNC Access for All Program. The SFMTA, San Francisco Office on Disability and Accessibility, and the San Francisco County Transportation Authority submitted joint comments in support of this petition. On August 28, 2025, the CPUC approved Uber's petition with an additional qualification, opening the door to Third-Party WAV trips. The SFMTA believes allowing ramp taxis to service TNC WAV trips will expand accessible transportation availability and benefit ramp taxi drivers, and staff anticipate amending the Taxi Upfront Fare Program rules in the coming months to allow such trips.

The SFMTA remains committed to supporting the taxi industry through innovative new programs and services, including the Taxi Upfront Fare Program and the [Essential Trip Card program](#), a subsidized taxi service for older adults and people with disabilities. SFMTA staff value the quarterly Taxi Outreach Meetings as an opportunity to receive essential input from the taxi industry and taxi riders. Taxis play an essential role in San Francisco's transportation system, and the SFMTA will continue to explore new opportunities to support a thriving taxi industry in San Francisco.