

E-HAIL PILOT PROGRAM

June 16, 2014

E-Hail Adoption and Fulfillment Rates

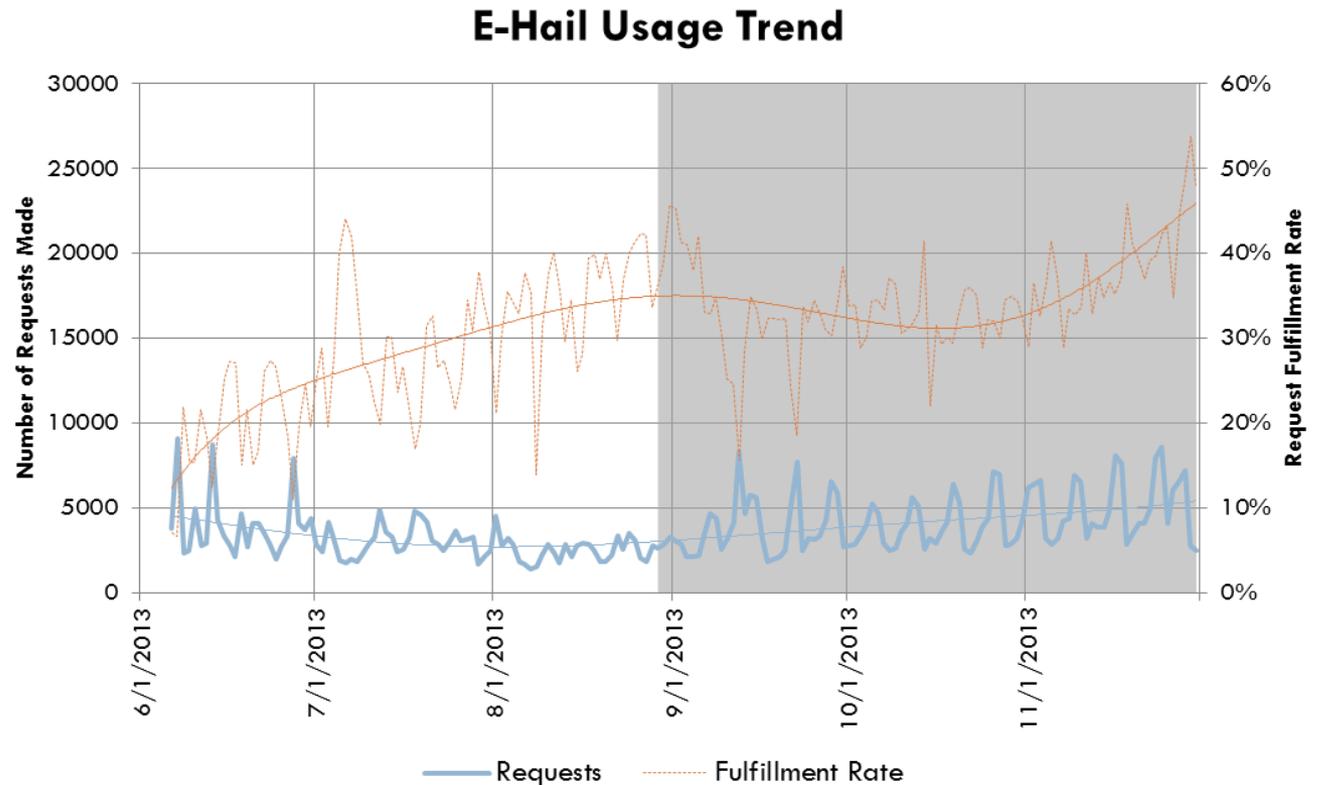
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From June to November 2013, 148,094 unique users requested an E-Hail a total of 658,856 times.

5,060 drivers completed E-Hail trips.

E-Hails were requested an average of 3,744 times a day.

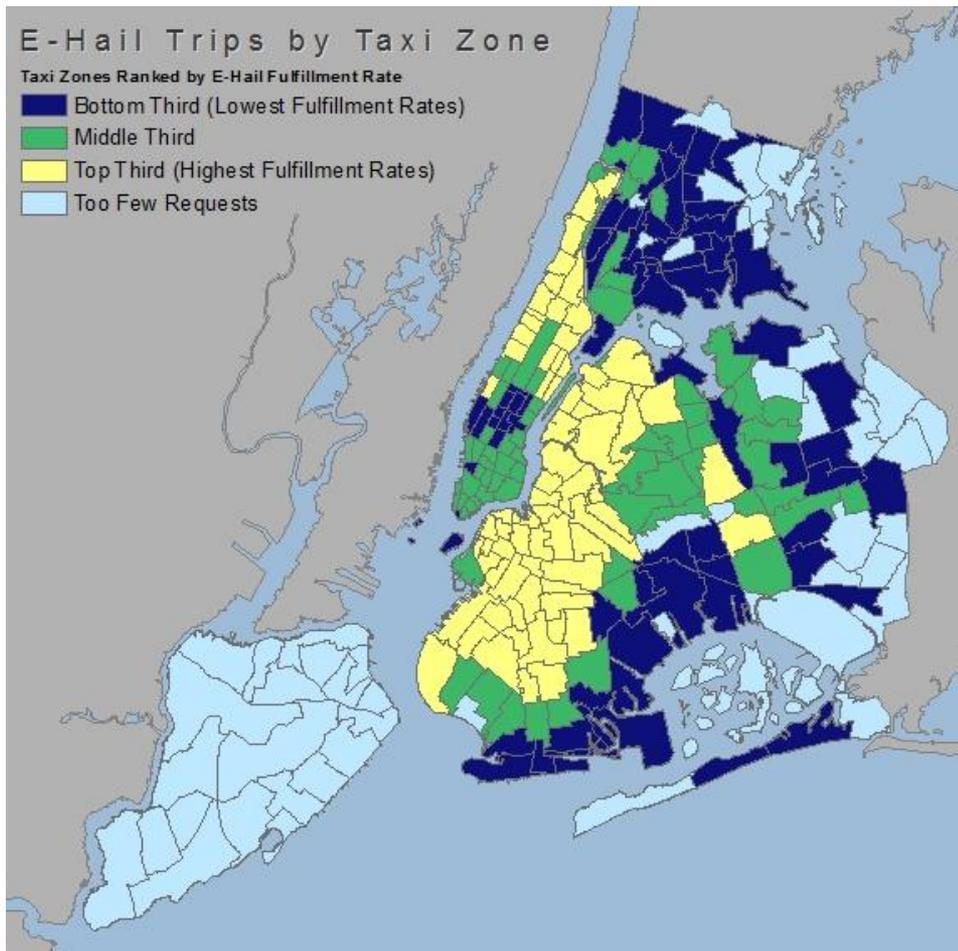
E-Hail fulfillment rate was 27%. This is an average of 2.7 trips per user who took a trip using E-Hail.



Source: E-Hail usage data (June 6, 2013 to November 30, 2013)

Where are Passengers using E-Hail?

3



Source: E-Hail usage data (June 6, 2013 to November 30, 2013)

- E-Hails accounted for 0.25% of all yellow cab pickups.
- The highest E-Hail fulfillment rates form a ring around the Manhattan Central Business district and the farther from that ring one travels, the lower the fulfillment rate.
- The majority of pickups occurred in either Manhattan or the parts of the other boroughs closest to Manhattan.

Where are Passengers using E-Hail?

	% of All E-Hail Pickups	% of All Taxi Pickups
Manhattan Below 110 th St.	32.20%	90.14%
Manhattan Above 110 th St.	7.08%	1.67%
Brooklyn North of Prospect Park	46.30%	2.81%
Brooklyn South of Prospect Park	2.25%	0.08%
Queens (excluding airports)	11.95%	1.31%
The Bronx	0.21%	0.05%
Staten Island	0.00%	0.00%
Airports	0.00%	3.92%
Total Trips	201,697	80,675,104

67.8% of all E-Hailed trips were picked up either north of 110th Street in Manhattan or in the other boroughs excluding airports vs. only 5.9% of all taxi pick-ups.

These same areas enjoyed some of the highest E-Hail fulfillment rates.

Highest E-Hail fulfillment rates were in Astoria, Harlem, and Brooklyn north of Prospect Park.

Source: E-Hail usage data (June 6, 2013 to November 30, 2013)

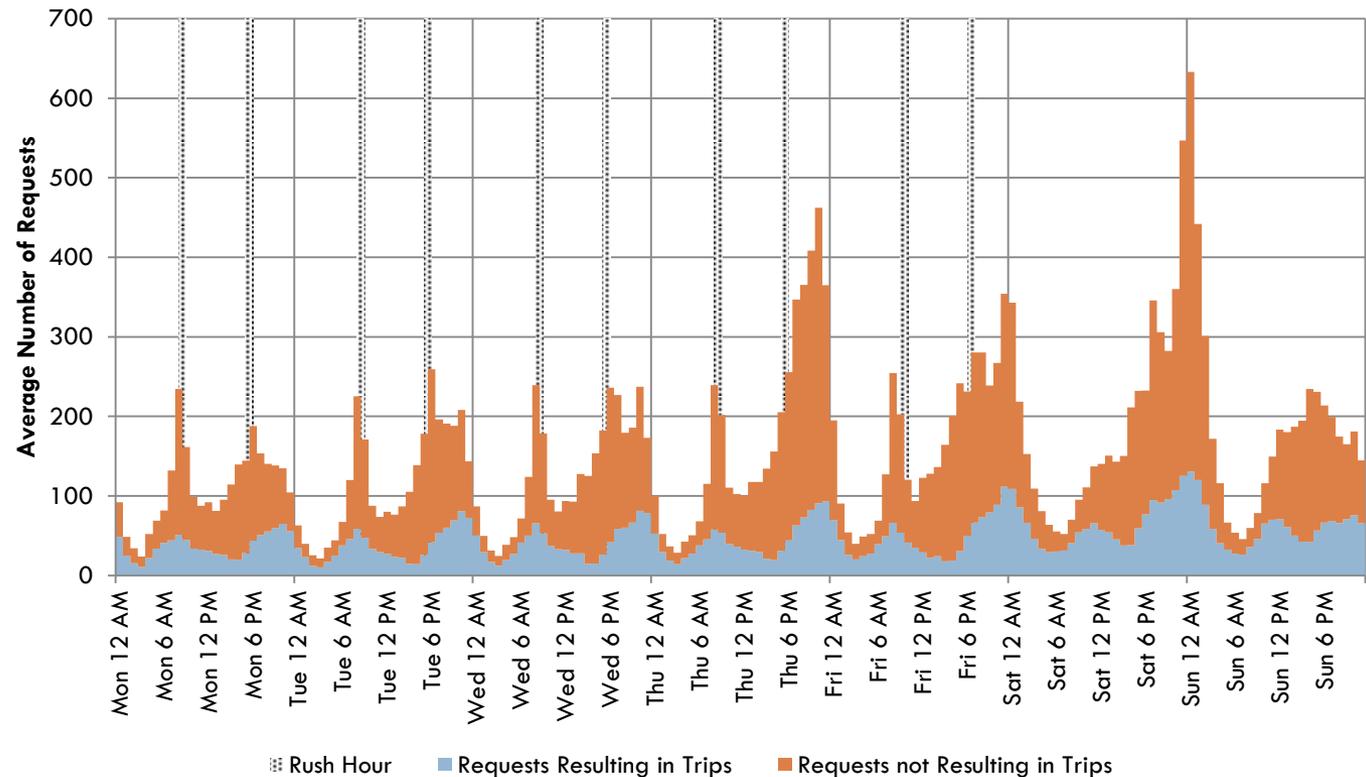
When are Passengers using E-Hail?

5

E-Hail requests were cyclical, peaking at 8PM and dropping off after midnight (similar to overall taxi patterns).

A larger percentage of E-Hail trips take place in the early morning than do taxi trips in general (24% vs. 15%).

E-Hail Requests by Time of Day



Source: E-Hail usage data (June 6, 2013 to November 30, 2013)

Impact on Yellow Taxicab Industry

6

- Average number of daily trips decreased 1.6% compared to same time last year; however, average farebox revenue was higher by 7.5%.
- When drivers used E-Hail in the month of November, they averaged approximately the same number of trips per shift than their peers who did not use E-Hail at all.
- Number of active licensed taxi drivers increased by 4.1% (2,033 drivers) compared to November 2012.

Impact on FHV Industry

7

FHV Licensees as of November 2011, November 2012, and November 2013					
	2011	2012	2013	Change from 2012 to 2013	
FHV bases	750	773	828	+55	+7.12%
FHV vehicles	36,868	38,240	43,164	+4,924	+12.88%
FHV drivers	52,162	51,799	55,783	+3,984	+7.69%

Source: TLC Licensing Records as of last day of November in each year.

The number of TLC-issued licenses in the FHV sector increased across the board when comparing the number of active licensees in the month of November 2013 to the number of active licensees in the months of November 2011 and 2012.

Impact on FHV Industry

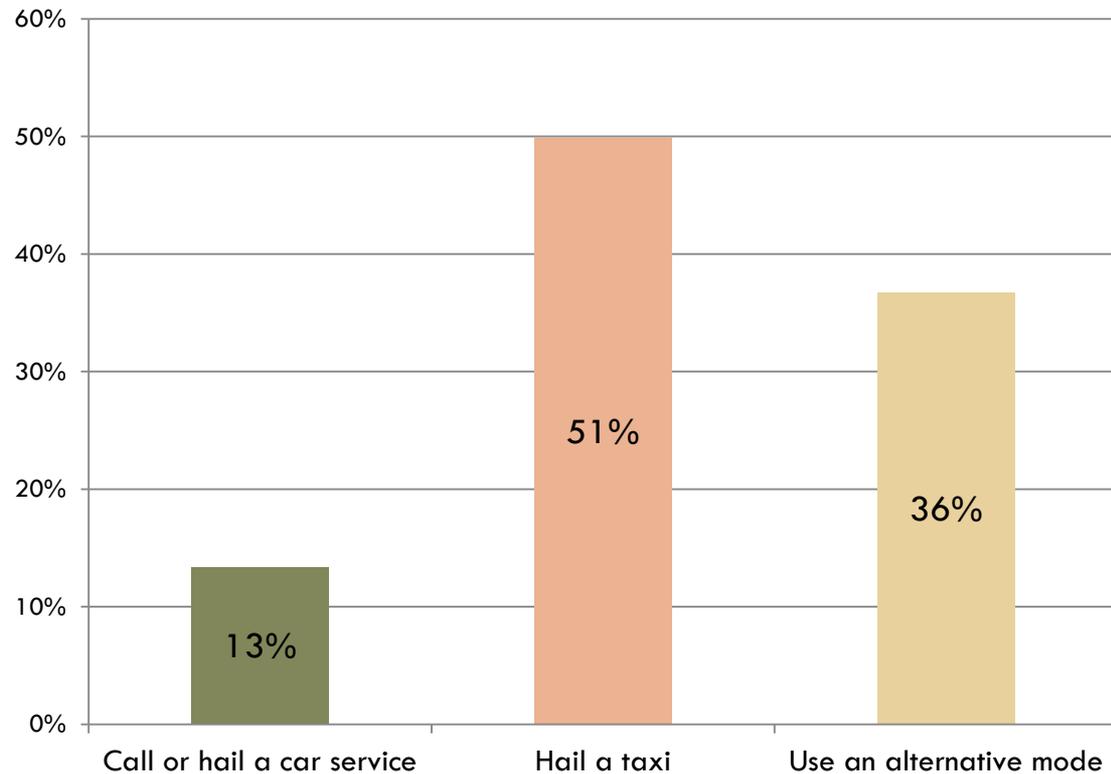
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Most passengers who E-Hailed reported that they would have hailed a taxi even without an E-Hail app.

13% of passengers reported they would have called or hailed a car service.

Applied to the daily average of 1,144 E-Hail trips, this 13% only translates to 0.0034 daily trips per FHV.

How would you have most likely gotten to your destination without the use of an app?



Source: TLC E-Hail Passenger Survey, 2013.

Impact on Passenger Service

9

- Passengers are split over the value of E-Hail:
 - 25% of passengers reported that E-Hails were more convenient.
 - 25% of passengers reported that street hails were more convenient.
 - 38% of passengers reported the convenience varied by trip.
- Relatively few trips originated through E-Hailing, thus wait times were not likely to have been significantly impacted for passengers who do not own or use smartphones.
- E-Hail apps were used by passengers of all ages:
 - 27% of passenger respondents who E-Hailed were between 20 and 34.
 - 26% were between 35 and 64.
 - 23% were aged 65 or older.
- There were no major upticks in 311 complaints of cell phone use, unsafe driving, or refusals; in fact, unsafe driving and cell phone use complaints combined dropped by 12.6% compared to same time last year.
- Accident data received from the DMV for June through August show just 1.4% of drivers who participated in E-Hail were involved in accidents vs. 3.1% of drivers who did not participate in E-Hail in that same time period.

Conclusions

Data evaluated by TLC suggests that E-Hail Apps increase the efficiency by which passengers and drivers are connected in certain lower-trafficked areas and they do so without negatively impacting the FHV industry or general taxi hailing public.

- Adoption by passengers and drivers grew over the first six months, and as customers became more experienced users, their fulfillment rates went up.
- E-Hail Apps are having the greatest effect on passengers and drivers in places that tend to be underserved by taxis.
- E-Hail service has been utilized by people of all ages, including senior citizens who make up a quarter of reported app users.
- Refusals and safety are unaffected, as complaints in both categories are equivalent or down from same time last year, and DMV data received to date indicates E-Hail drivers contribute to fewer accidents than non E-Hail drivers.
- Finally, given the low percentage of trips that are E-Hailed, the overall financial impact on both FHV and medallion industries has been small.