

E-HAIL PILOT PROGRAM

June 16, 2014

E-Hail Adoption and Fulfillment Rates

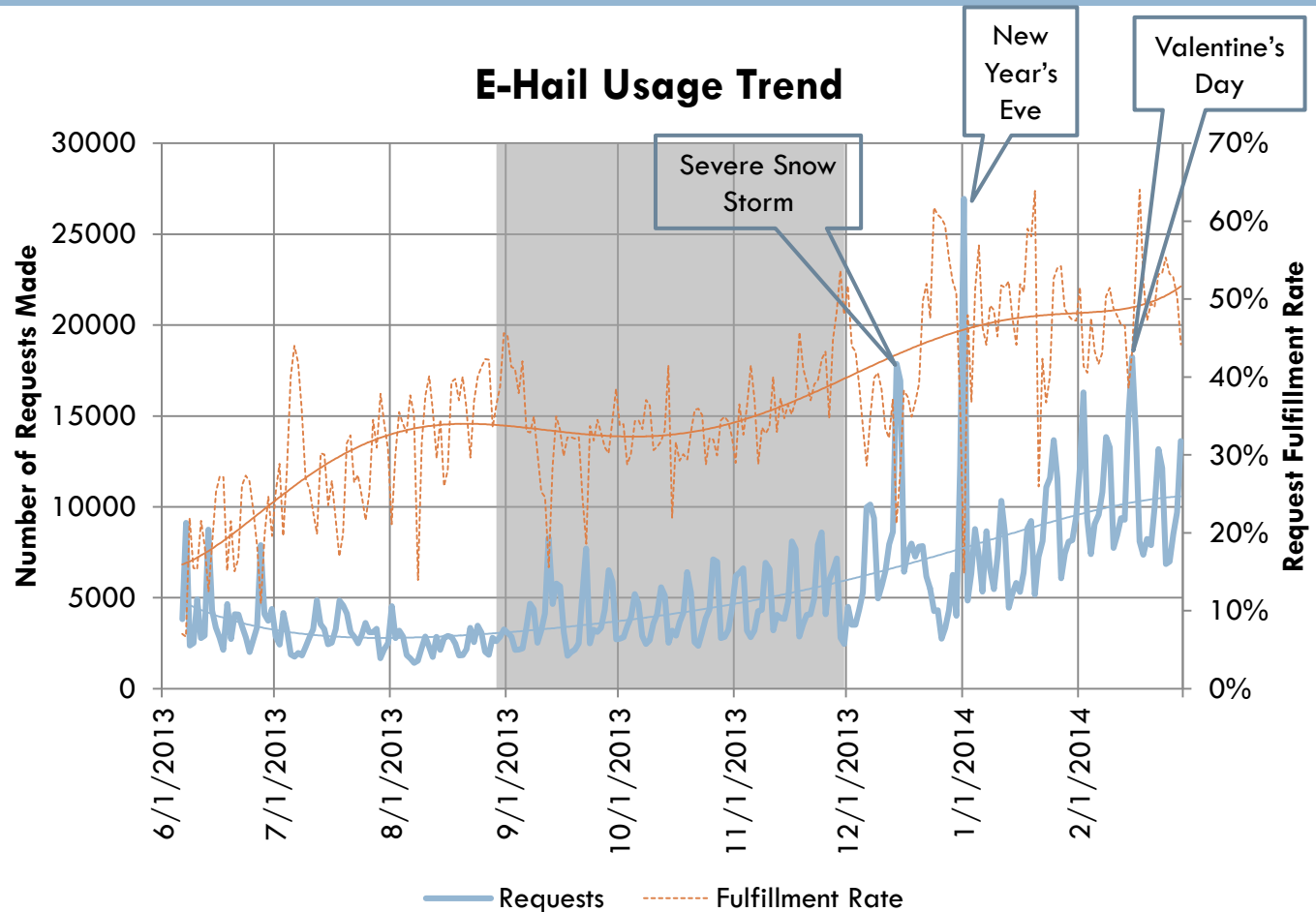
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From June 2013 to February 2014, 237,328 unique users requested an E-Hail a total of 1,431,715 times.

6,349 drivers completed E-Hail trips.

E-Hails were requested an average of 5,403 times a day.

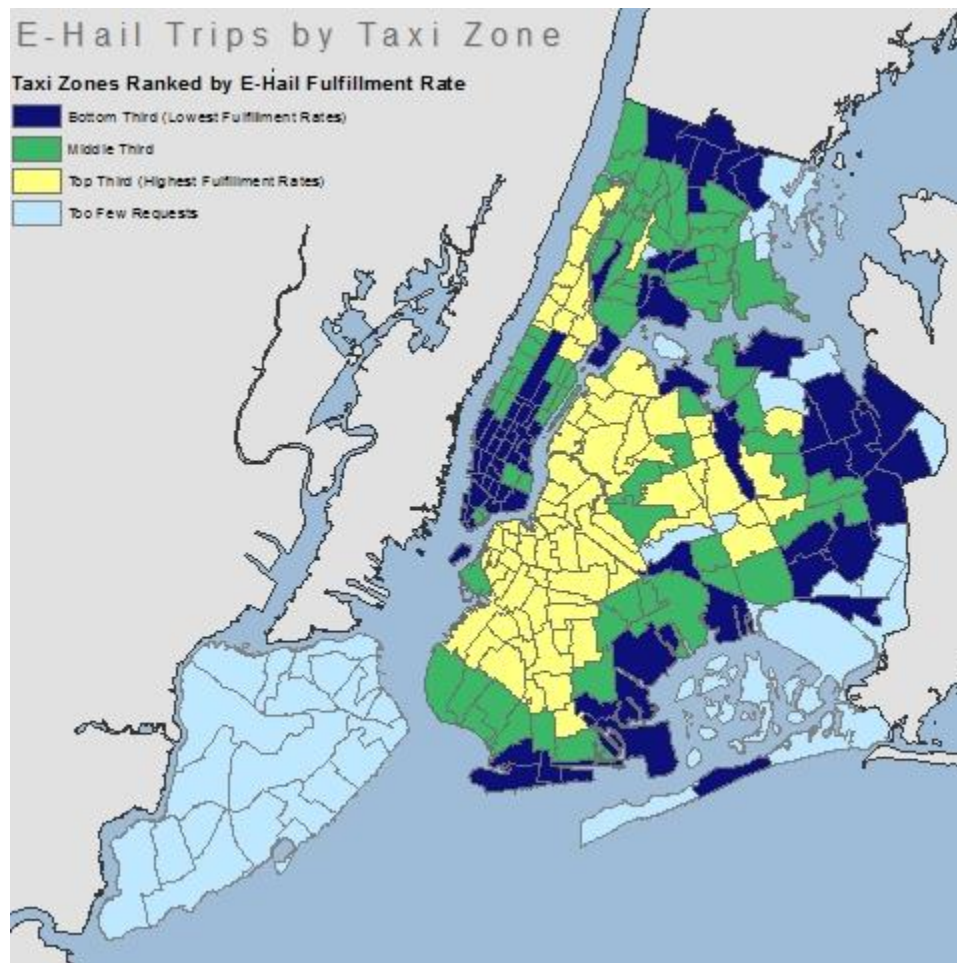
E-Hail fulfillment rate was 38%. This is an average of 3.9 trips per user who took a trip using E-Hail.



Source: E-Hail usage data (June 6, 2013 to February 28, 2014)

Where are Passengers using E-Hail?

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- E-Hails accounted for 0.45% of all yellow cab pickups.
- The highest E-Hail fulfillment rates were in Brooklyn, Queens, and Northern Manhattan.
- The lowest fulfillment rates were in Manhattan below 110th Street and the parts of the other boroughs farthest from Manhattan.

Source: E-Hail usage data (June 6, 2013 to February 28, 2014)

Where are Passengers using E-Hail?

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	% of All E-Hail Pickups	% of All Taxi Pickups
Manhattan Below 110 th St.	24.46%	90.40%
Manhattan Above 110 th St.	6.86%	1.65%
Brooklyn North of Prospect Park	52.51%	2.73%
Brooklyn South of Prospect Park	3.05%	0.08%
Queens (excluding airports)	12.64%	1.30%
The Bronx	0.48%	0.06%
Staten Island	0.00%	0.00%
Airports	0.00%	3.78%
Total Trips	544,472	120,846,442

Source: E-Hail usage data (June 6, 2013 to February 28, 2014)

75.5% of all E-Hailed trips were picked up either north of 110th Street in Manhattan or in the other boroughs excluding airports vs. only 5.8% of all taxi pick-ups.

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

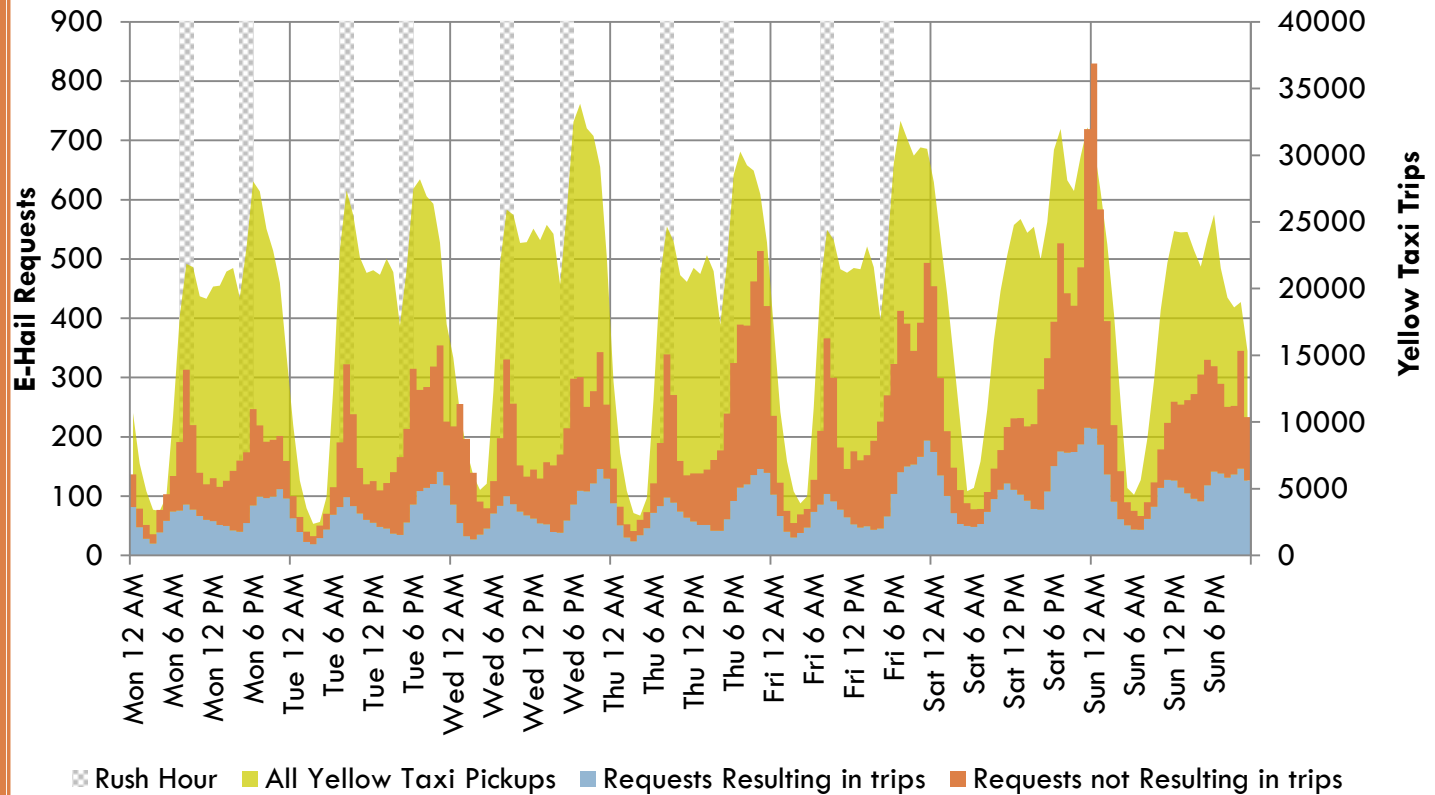
Highest E-Hail fulfillment rates were in Astoria, Harlem, and Brooklyn north of Prospect Park.

When are Passengers using E-Hail?

E-Hail requests were cyclical, peaking at 5 AM on weekdays and again at 7-9PM 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 (22% vs. 15%).

Average Weekly E-Hail Requests by Time of Day



Source: E-Hail usage data (June 6, 2013 to February 28, 2014)

Impact on Yellow Taxicab Industry

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- Average number of daily trips decreased 3.1% compared to same time last year; however, average farebox revenue was higher by 3.9%.
- When drivers used E-Hail in the month of February, they averaged approximately the same number of trips per shift as their peers who did not use E-Hail at all.
- Number of actively licensed taxi drivers increased by 3.7% (1,846 drivers) compared to February 2013.

Impact on FHV Industry

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	FHV Licensees as of February 2012, February 2013, and February 2014				
	2012	2013	2014	Change from 2013 to 2014	
FHV bases	783	778	834	+56	+7.2%
FHV vehicles	38,041	39,146	45,845	+6,699	+17.1%
FHV drivers	51,440	52,958	57,487	+4,529	+8.6%

Source: TLC Licensing Records as of last day of February 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 February 2014 to the number of active licensees in the months of February 2012 and 2013.

Impact on FHV Industry

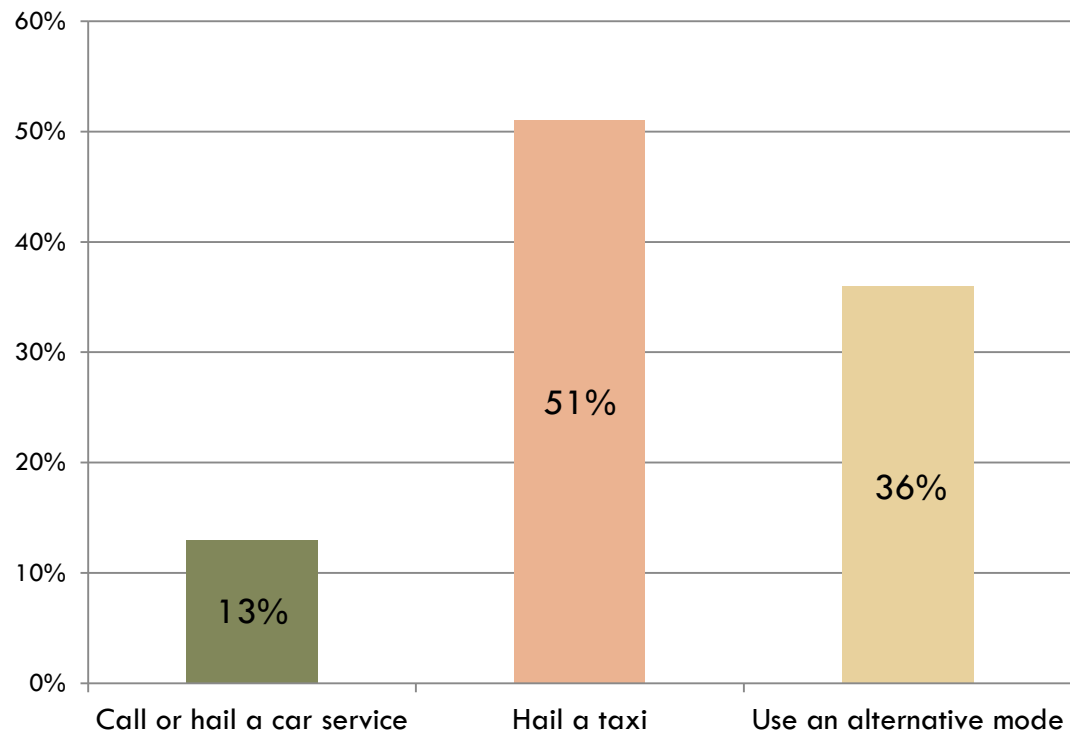
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Most passengers who E-Hailed reported that they would have hailed a taxi even without an E-Hail app.

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

Applied to the daily average of 2054.61 E-Hail trips, this 13% only translates to 0.0058 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 and 2014

Impact on Passenger Service

- Passengers are split over the value of E-Hail:
 - 25% of passengers reported that E-Hails were more convenient.
 - 24% of passengers reported that street hails were more convenient.
 - 37% 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:
 - 26% of passenger respondents who E-Hailed were between 20 and 34.
 - 25% were between 35 and 64.
 - 24% were aged 65 or older.
- Compared to same time last year, refusal complaints were at similar levels and combined unsafe driving and cell phone use complaints dropped by 10.8%.
- Collision data received from the DMV for June 2013 through February 2014 show just 2.4% of drivers who participated in E-Hail were involved in collisions vs. 5.3% 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 nine 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.
- Safety is unaffected, as complaints are down from same time last year, and DMV data received to date indicates E-Hail drivers contribute to fewer collisions 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.