

E-HAIL PILOT PROGRAM FINAL REPORT

January 28, 2015

E-Hail Adoption and Fulfillment Rates

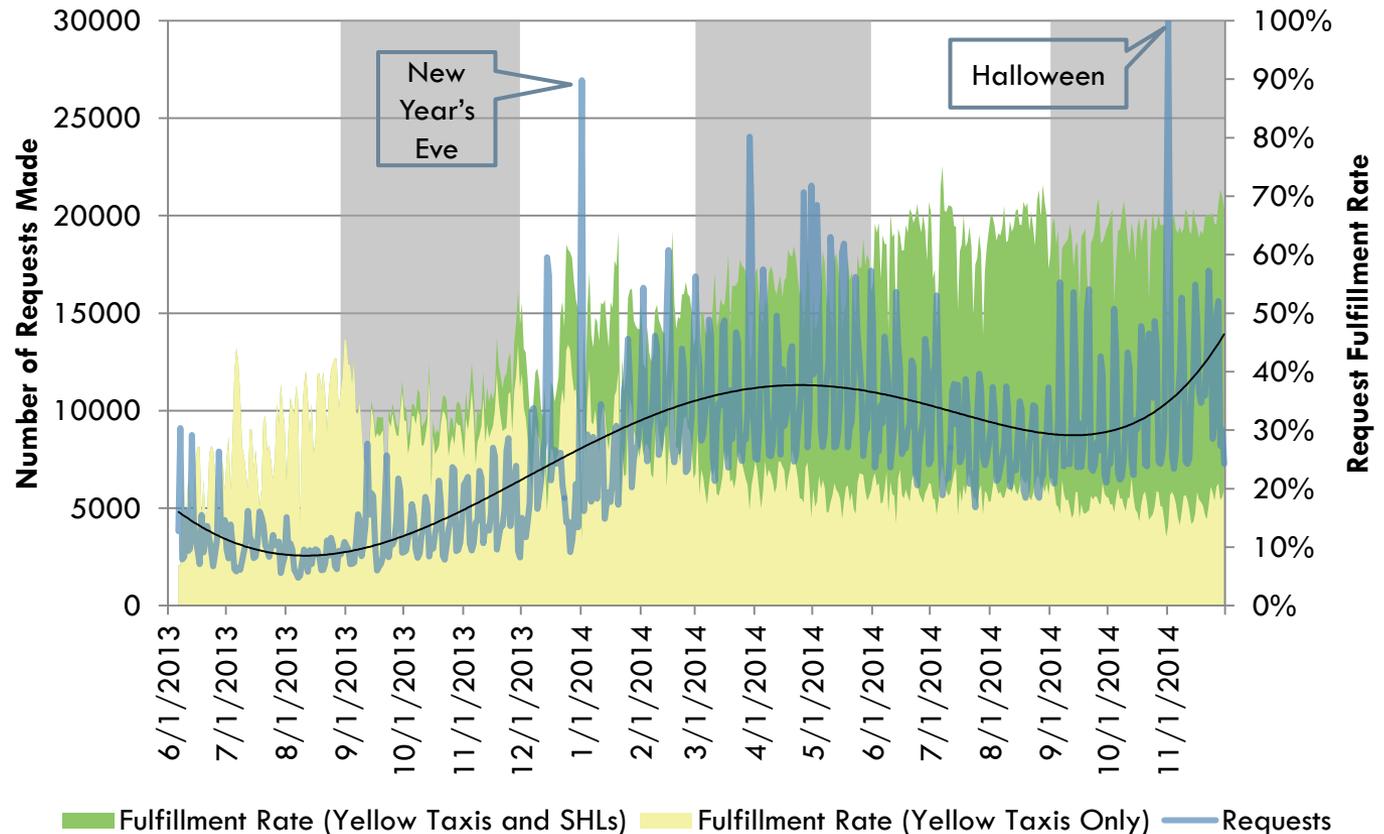
From June 2013 to November 2014, 479,424 unique users requested an E-Hail a total of 4,291,584 times.

8,407 taxi drivers completed E-Hail trips.

E-Hails were requested an average of 7,947 times a day.

28% of all E-Hail requests were fulfilled by yellow taxis and 30% by Street Hail Liveries (SHLs) over the 18 months of the pilot covered by this report.

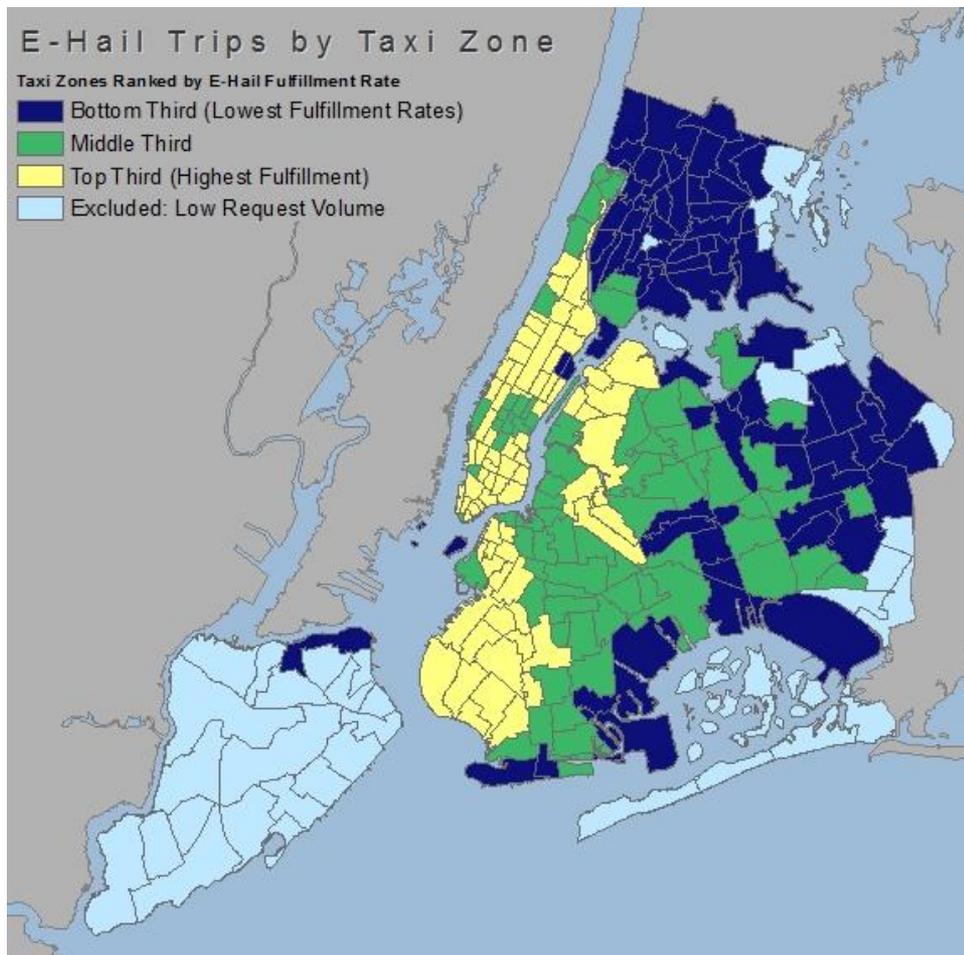
E-Hail Usage Trend



Source: E-Hail usage data (June 6, 2013 to November 30, 2014)
 *TLC is missing data from one E-Hail participant after 5/31/2014

Where are Passengers using E-Hail?

3



- E-Hails accounted for 0.39% of all yellow cab pickups.
- The highest E-Hail fulfillment rates by taxis were in the Upper West Side, the Upper East Side, Astoria, and Southwestern Brooklyn.
- The lowest fulfillment rates by taxis were in Yorkville, northeastern Bronx, and Marine Park.

Source: E-Hail usage data (June 6, 2013 to November 30, 2014)

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Where are Passengers using E-Hail?

4

	% of All E-Hail Pickups	% of All Taxi Pickups
Manhattan Below 110 th St.	34.65%	90.09%
Manhattan Above 110 th St.	4.83%	1.59%
Brooklyn North of Prospect Park	46.84%	2.45%
Brooklyn South of Prospect Park	3.60%	0.55%
Queens (excluding airports)	9.86%	1.33%
The Bronx	0.20%	0.06%
Staten Island	0.00%	0.00%
Airports	0.00%	3.92%
Total Trips	954,379	243,338,836

65.3% of all E-Hailed taxi trips were picked up either north of 110th Street in Manhattan or in the other boroughs excluding airports vs. only 6.0% of all taxi pick-ups.

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

Source: E-Hail usage data (June 6, 2013 to November 30, 2014)

Note: Columns may not sum to 100% due to rounding error

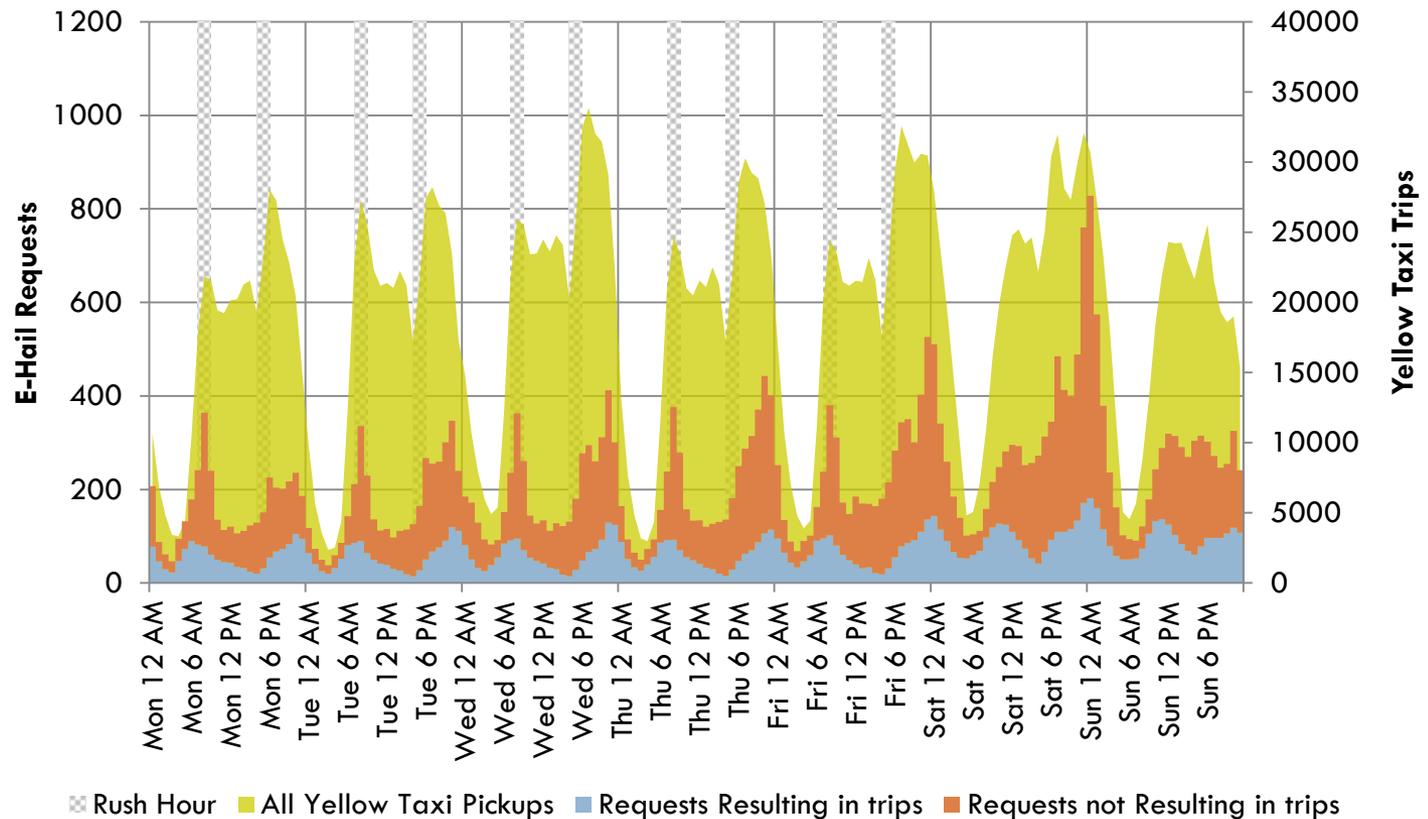
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When are Passengers using E-Hail?

E-Hail requests were cyclical, peaking at 8 AM on weekdays and again at 10PM and dropping off after midnight (similar to overall taxi patterns).

A larger percentage of taxi E-Hail trips take place in the early morning than do taxi trips in general (28% vs. 15%).

Average Weekly E-Hail Requests by Time of Day



Source: E-Hail usage data (June 6, 2013 to November 30, 2014)

*TLC is missing data from one E-Hail participant after 5/31/2014

Impact on Yellow Taxicab Industry

6

- Average farebox revenue across the entire first year of the pilot program was higher by 2.7%. The average farebox for the subsequent six months, June 2014 through November 2014, increased by 3.9% compared to the same pre-pilot period.
- When taxi drivers used E-Hail in the month of November 2014, 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 1.7% (865 drivers) compared to November 2013.

Impact on FHV Industry

7

	FHV Licensees as of November 2012, November 2013, and November 2014				
	2012	2013	2014	Change from 2013 to 2014	
FHV bases	773	828	838	+10	+1.2%
FHV vehicles	38,240	43,164	53,842	+10,678	+24.7%
FHV drivers	51,799	55,783	71,063	+15,280	+27.4%

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 2014 to the number of active licensees in the months of November 2012 and 2013.

Impact on FHV Industry

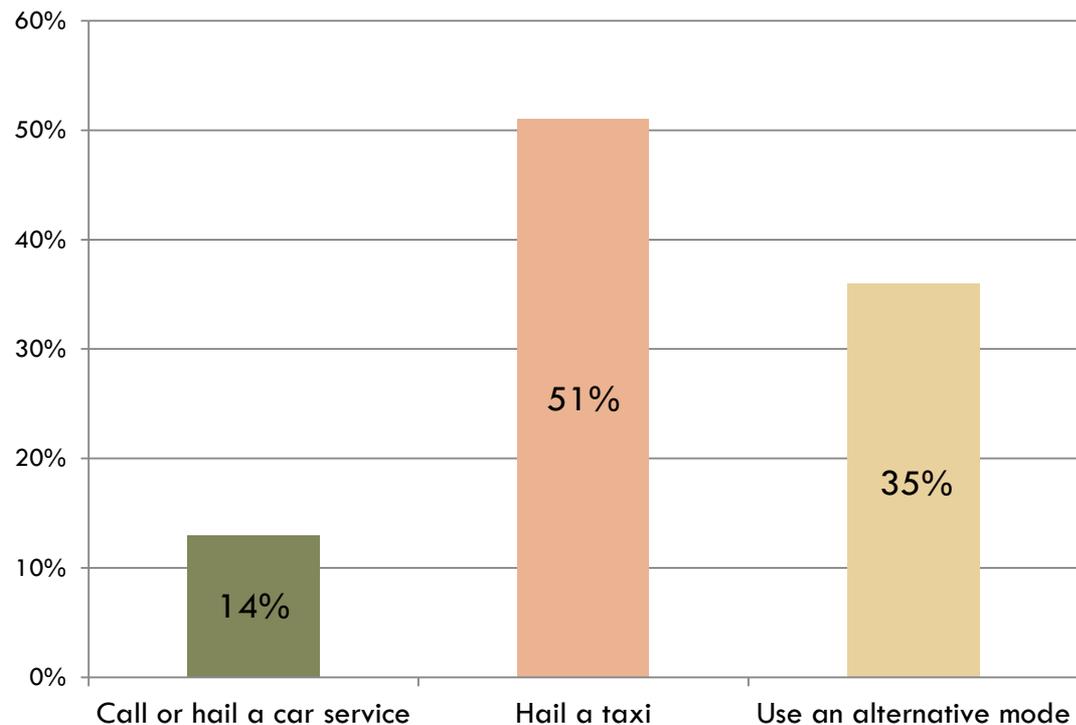
8

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

14% of passengers reported they would have called or hailed a car service.

Applied to the daily average of 4,145.7 E-Hail trips, this 14% only translates to 0.0108 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

Note: Columns may not sum to 100% due to rounding error

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.
 - 35% 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:
 - 23% of passenger respondents who E-Hailed were between 20 and 34.
 - 24% were between 35 and 64.
 - 28% were aged 65 or older.
- Compared to the same period in the year before the pilot, refusal complaints were at similar levels, and unsafe driving and cell phone use complaints were lower by 10.5% in the first year of the pilot and lower by 7.1% in the subsequent six months.
- Collision data received from the DMV for June 2013 through November 2014 show just 6.0% of taxi drivers who participated in E-Hail were involved in collisions vs. 8.4% of taxi 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 the general taxi hailing public.

- Adoption by passengers and drivers grew over the pilot, 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 before the pilot, 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.