

# E-HAIL PILOT PROGRAM

June 16, 2014

# E-Hail Adoption and Fulfillment Rates

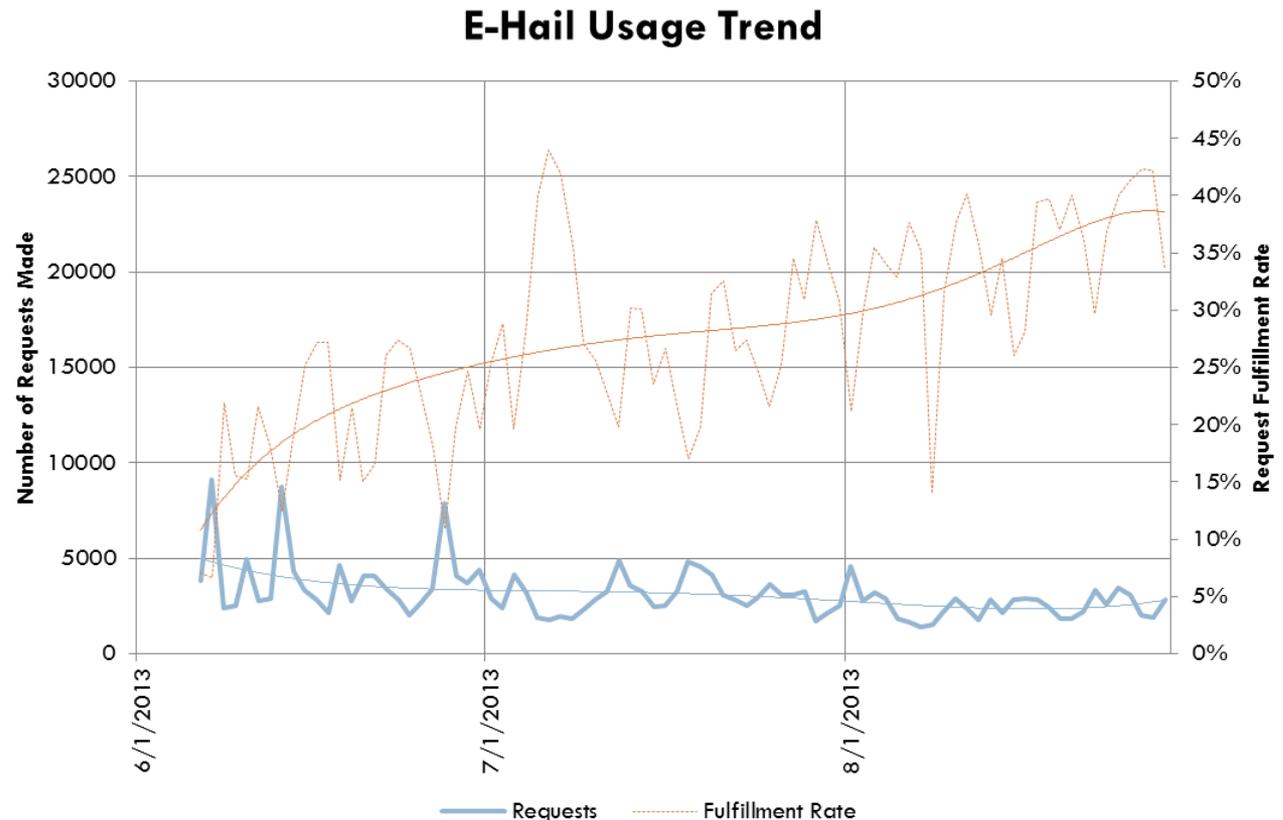
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From June to August, 2013, 66,280 unique users requested an E-Hail a total of 265,299 times.

3,664 drivers completed E-Hail trips.

E-Hails were requested on average 3,158 times a day.

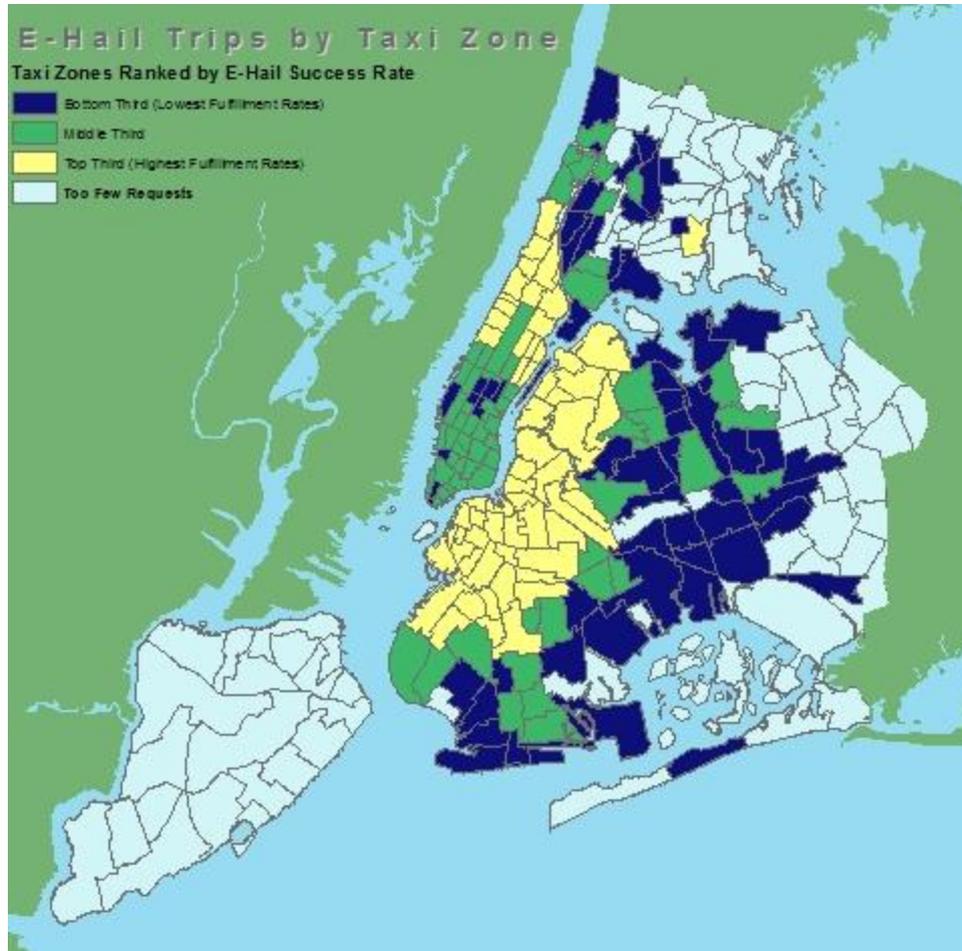
E-Hail fulfillment rate was 25%, an average of 2.34 trips per user.



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

# Where are Passengers using E-Hail?

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

- E-Hails accounted for 0.18% of all yellow cab pickups.
- Successful E-Hails generally mimicked overall taxi pickup geographic patterns: the farther from Manhattan Central Business District one travels, the fewer E-Hail pickups occur and the lower the success rate.

# Where are Passengers using E-Hail?

	% of All E-Hail Pickups	% of All Taxi Pickups
Manhattan Below 110 <sup>th</sup> St.	46.54%	90.23%
Manhattan Above 110 <sup>th</sup> St.	5.99%	1.64%
Brooklyn North of Prospect Park	35.23%	2.67%
Brooklyn South of Prospect Park	1.54%	0.08%
Queens (excluding airports)	10.54%	1.35%
The Bronx	0.16%	0.05%
Staten Island	0.00%	0.00%
Airports	0.00%	3.97%
Total Trips	67,196	36,915,269

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

Non-airport outer borough locations made up 53.5% of all E-Hailed trips vs. only 5.8% of all taxi pick-ups.

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

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

Lowest E-Hail success rates were in Midtown Manhattan and New York City edges.

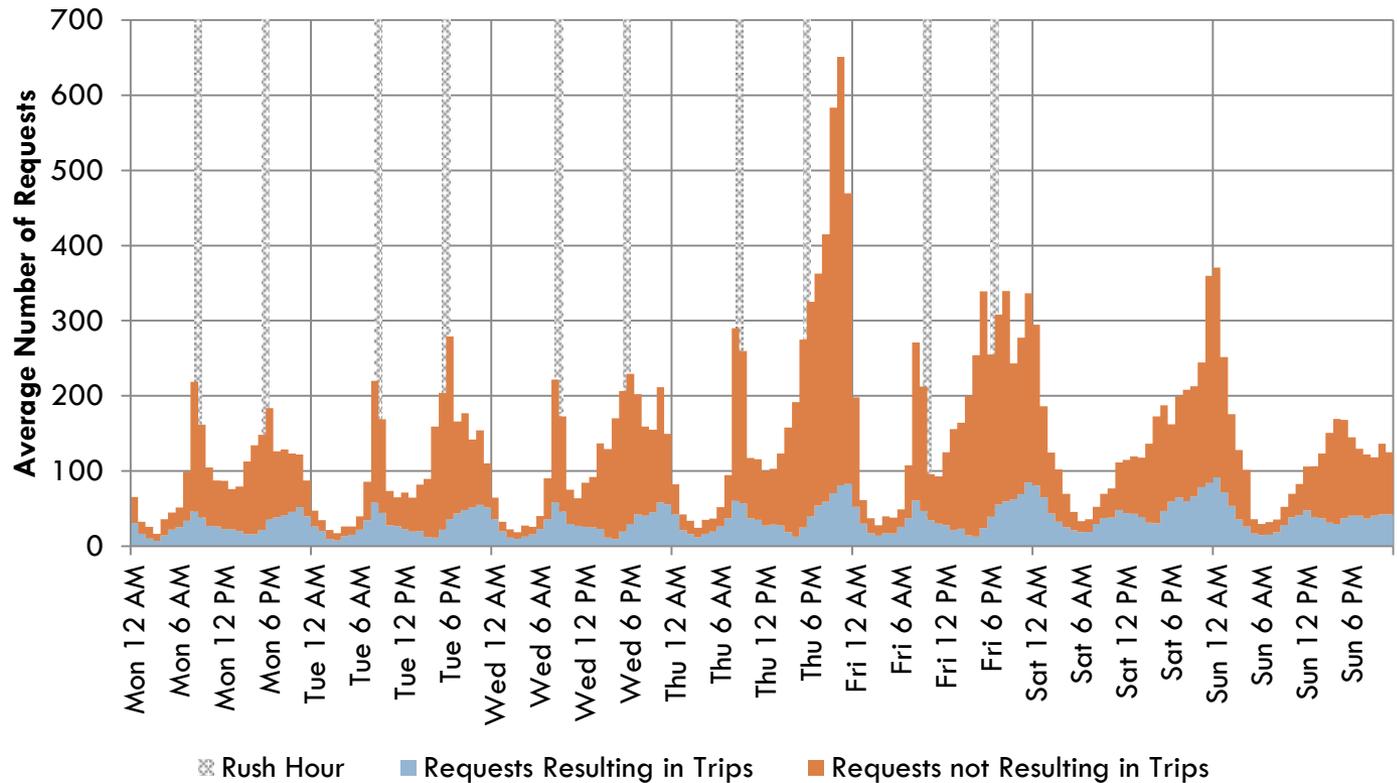
# When are Passengers using E-Hail?

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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 (22% vs. 16%).

## E-Hail Requests by Time of Day



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

# Impact on Yellow Taxicab Industry

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- Average number of daily trips decreased 4.6% compared to same time last year, but average farebox revenue was higher by 5.9%.
- Number of licensed taxi drivers increased by 3.7% (1,797 drivers).
- E-Hail Drivers reported high satisfaction and increased revenue:
  - ▣ 65% reported making more money
  - ▣ 27% reporting making the same money
  - ▣ Only 8% reporting making less money

# Impact on FHV Industry

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	FHV Licensees as of August 2011, August 2012, and August 2013				
	2011	2012	2013	Change from 2012 to 2013	
FHV bases	741	761	825	<b>+64</b>	<b>+8.41%</b>
FHV vehicles	36,516	38,020	41,795	<b>+3,775</b>	<b>+9.93%</b>
FHV drivers	52,007	51,899	54,163	<b>+2,264</b>	<b>+4.36%</b>

Source: TLC Licensing Records as of last day of August 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 August 2013 to the number of active licensees in the months of August 2011 and 2012.

# Impact on FHV Industry

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- Monthly trip volumes in FHV's were lower compared with same time last year.
- The decline was already underway before the pilot started, and the difference was smaller in the months that E-Hail was in effect.
- Bases whose drivers use smartphone apps actually saw an increase in the number of trips by 1% compared to same time last year.
- This is compared to a decrease of 13% in bases whose drivers did not use apps.

	FHV Monthly Trip Volumes		
	2012	2013	% Difference
January	2,364,668	2,303,125	<b>-2.60%</b>
February	2,426,350	2,223,333	<b>-8.40%</b>
March	2,580,741	2,421,853	<b>-6.20%</b>
April	2,427,593	2,255,793	<b>-7.10%</b>
May	2,351,562	2,291,453	<b>-2.60%</b>
June	2,241,154	2,163,937	<b>-3.50%</b>
July	2,089,510	2,007,336	<b>-3.90%</b>

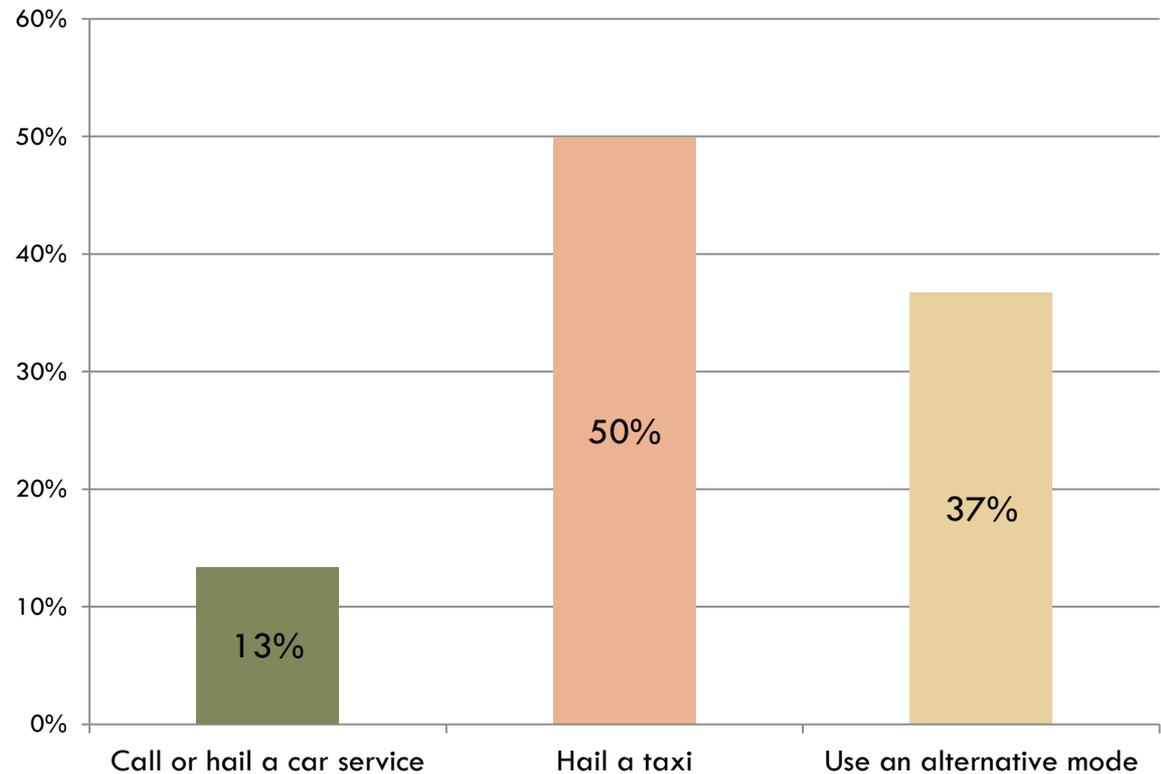
Source: FHV Base Surveys, February and August 2013.

# Impact on Passenger Service

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.

**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

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- Passengers are split over the value of E-Hail:
  - 24% of passengers reported that E-Hails were more convenient.
  - 24% of passengers reported that street hails were more convenient.
  - 40% 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:
  - 24% of passengers reporting haven E-Hailed a ride in Q1 were 34 or younger.
  - 23% were between 35 and 64.
  - 24% of passengers were aged 65 or older .
- There were no major upticks in refusal and unsafe driving complaints; in fact both were down from same period last year.

# 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 at off-peak times, and they do so without negatively impacting the FHV industry or general taxi hailing public.**

- Adoption by passengers and drivers grew over the first three months, and as customers became more experienced users, their success rates went up.
- Although geographic and temporal demand for E-Hail mirrors that of all taxis, E-Hail Apps are having the greatest effect on passengers and drivers at times and 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 down from same time last year.
- Finally, given the low percentage of trips that are E-Hailed, the overall financial impact on both FHV and medallion industries has been small.