

Are you 'appy yet?



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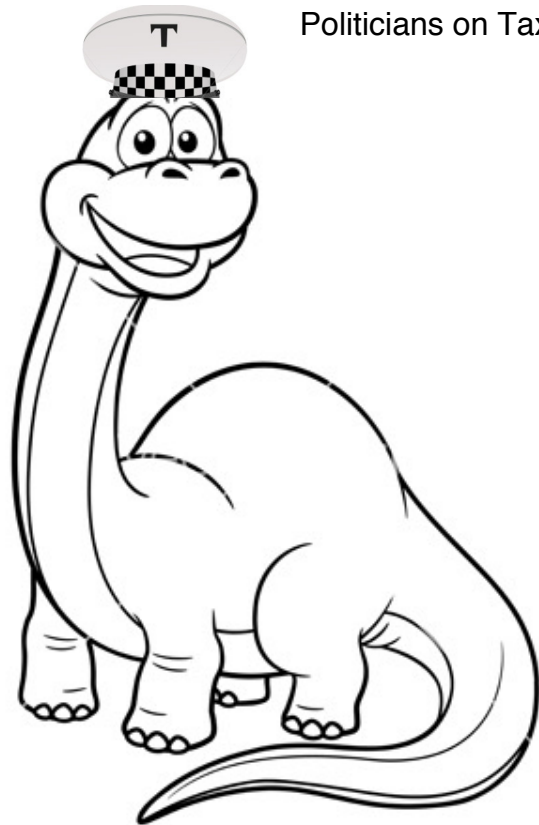
Agenda

- ◆ Market change is permanent, unavoidable and has happened
- ◆ Any accommodation, including the passive allowance of TNCs will result in losses to the taxi driver
- ◆ The concept of Transportation Network Company (TNC) as a licensing category is part of the problem
- ◆ Many of the measures that supported and protected the traditional market now work against it, and may appear as protectionist
- ◆ Partial and partisan presentation, spin or downright lie has led to an untenable situation for most, including the trade, its regulators and those politicians with whom the ultimate decision lies
- ◆ It is not reasonable to expect any reversal of fortune in new technology companies, nor base any action on that presumption
- ◆ What is the market for traditional taxis, and how can it be retained?
- ◆ Can a taxi app ever compete with Uber?



So what do you think of your competitors?

TNCs on Taxis



Public on Taxis
Politicians on Taxis

Taxis on TNCs



Basics #1

Area of Regulation	Regulations Applied (Taxi)	Regulations Applied (Limousine)	Regulations Applied (TNC)
Quantity	Maximum number of licenses issued	Open	Open / uncontrolled
Quality	Safety Standards applied	Safety Standards applied	Open / uncontrolled
Economic	Maximum taxi fare applied	Open	Open / uncontrolled



Basics #2

Vehicle Category	Transport fare fixed in advance	Transport fare based on published formula	Levels of fares (in normal use)	Subject to dynamic pricing	Restricted license numbers	May accept street hail	App booking / relative popularity of app	Plate / Medallion as transferable asset	Aggregate score
Limousine	Yes (+)		High (-)	No (-)	No (-)	No (/)	N/A	Some (+)	- -
Taxi		Yes (+)	Mid (/)	No* (-)	Yes* (+)	Yes (+)	N/A	Most (++)	+++++
Minicab	Yes (+)		Low (+)	No* (-)	No (-)	No (-)	N/A	Few (/)	-
Jitney			Low (++)	Varies (/)	No (-)	Varies (/)	N/A	No (-)	/

Mode	Score
Taxi	++++
Minicab	-
Limousine	- -

Basics #3

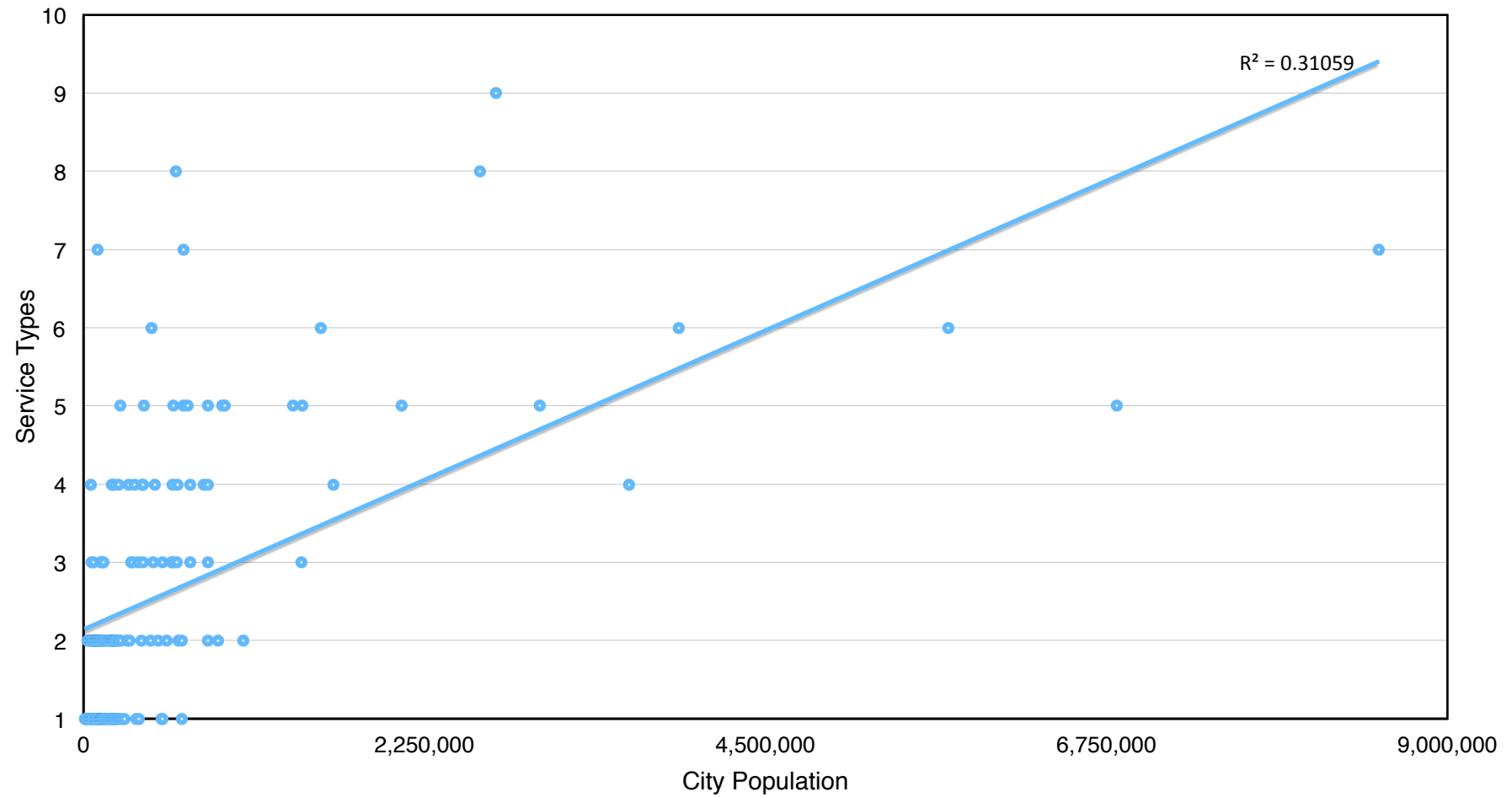
Jitney	X Class	Taxi	Limited markets	Premium (Livery)	Accessible
Uber Pool	Uber X	Uber Taxi	Uber for Hire	Uber Select	Uber Access
Uber Hop	Uber XL	Uber Cab	Uber Wine	Uber Black	Uber Assist
Lyft Line	Uber X Beaches	Uber T	Uber Wine XL	Uber Premium	Uber WAV
Lyft CarPool	Lyft	Curb Taxi	Uber Pedal	Uber Lux	Uber T WAV
	Lyft Plus	UpTop	Uber Ski	Uber Lux XL	Lyft accessible vehicle dispatch
	Uber GO	Taxi Hail	Uber Ski XL	Uber SUV	
			Gett NYC		

Basics Winners and Losers

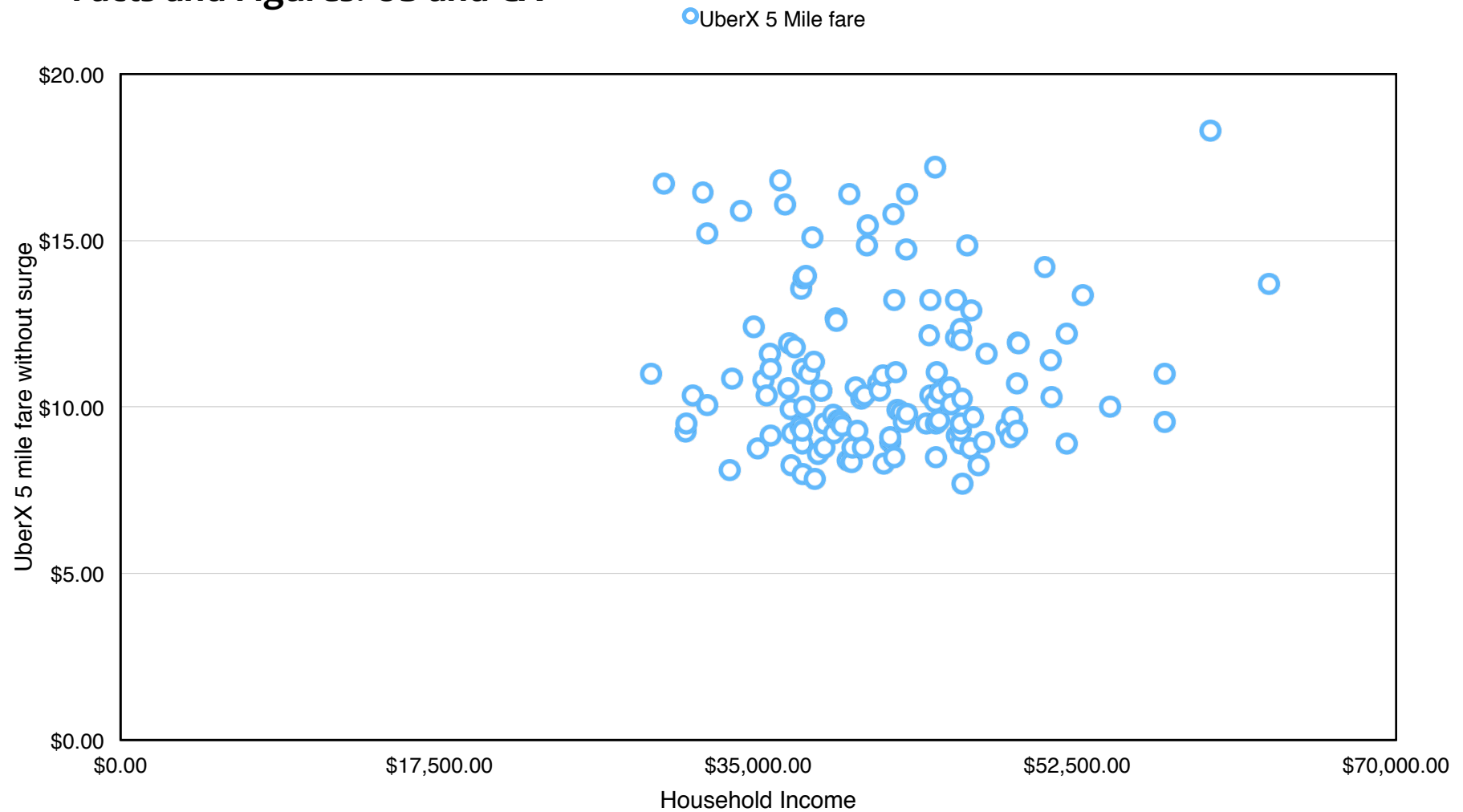
Vehicle Category	Transport fare fixed in advance	Transport fare based on published formula	Levels of fares (in normal use)	Subject to dynamic pricing	Restricted license numbers	May accept street hail	App booking / relative popularity of app	Plate / Medallion as transferable asset	Aggregate score
Limousine	/		-	/	+	/	- -	/	- -
Taxi		-	-	-	-	+	- -	- -	- - - - -
Minicab	-		/	/	+	-	-	/	- -
TNC vehicle (X class)		++	++	+	+	-	++	+	+++++++
Jitney		+	+	/	+	/	- -	/	+

Mode	Score
TNC X class	+++++++
Jitney	+
Minicab	- -
Limousine	- -
Taxi	- - - - -

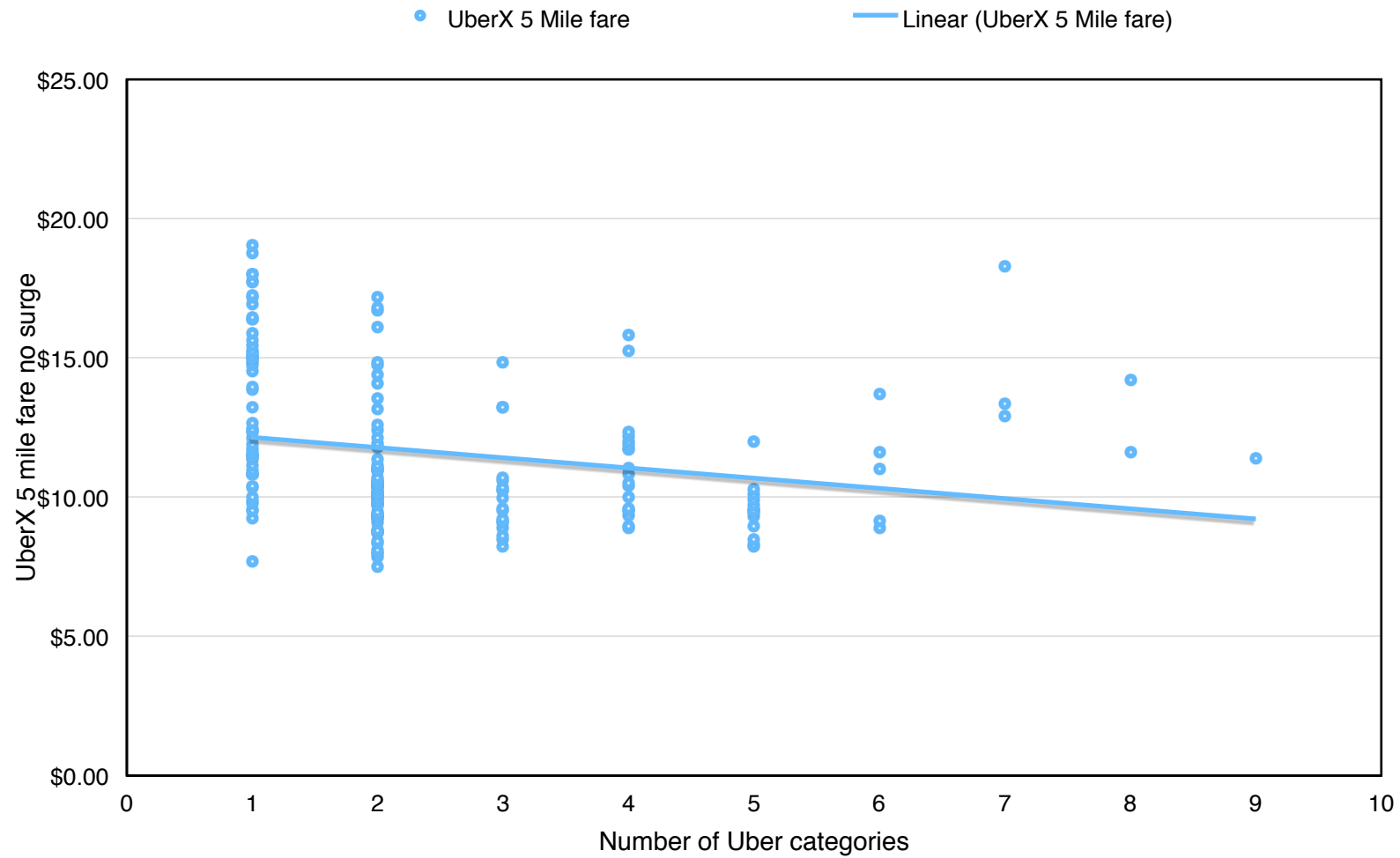
Facts and Figures: US and CA



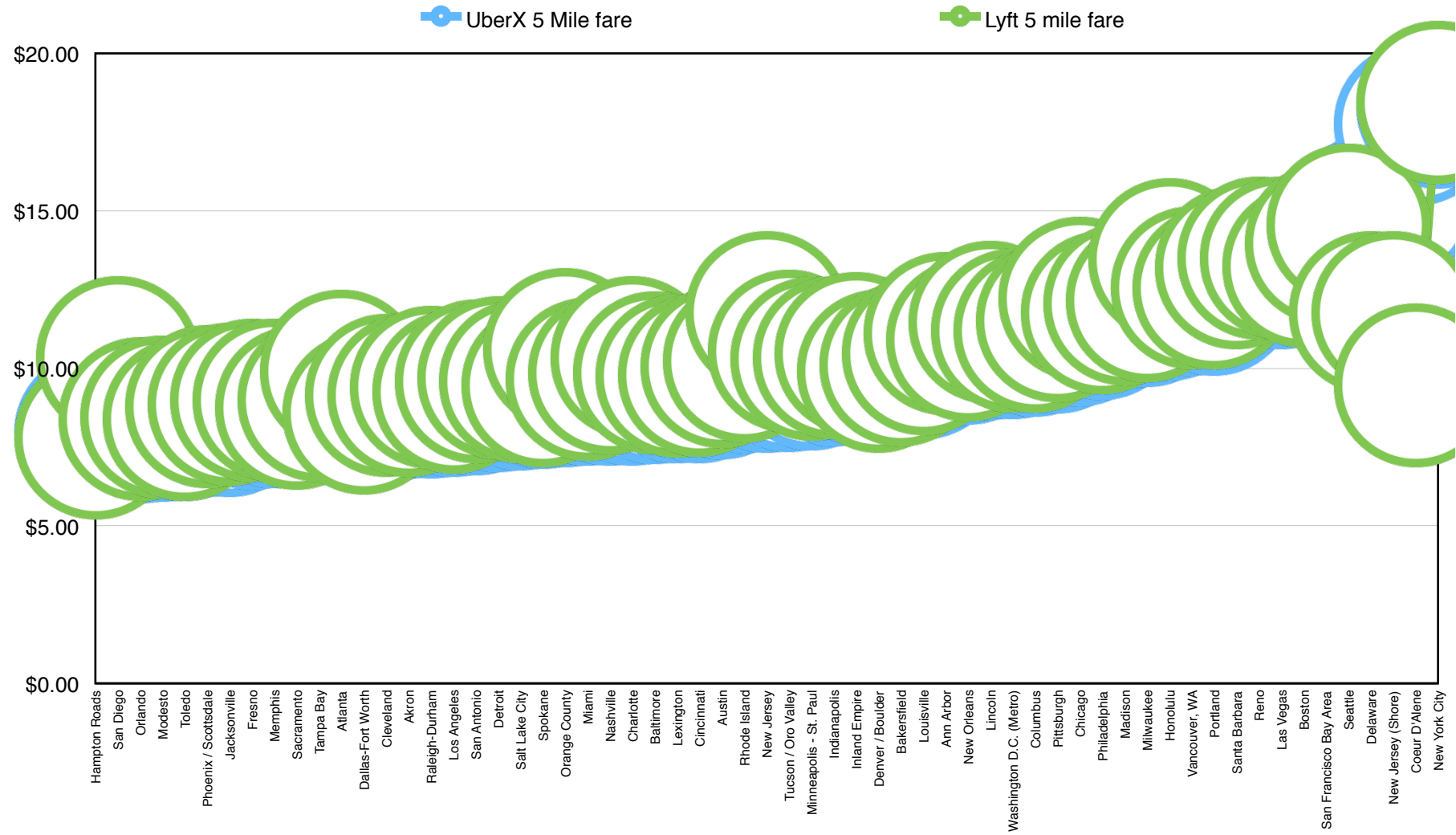
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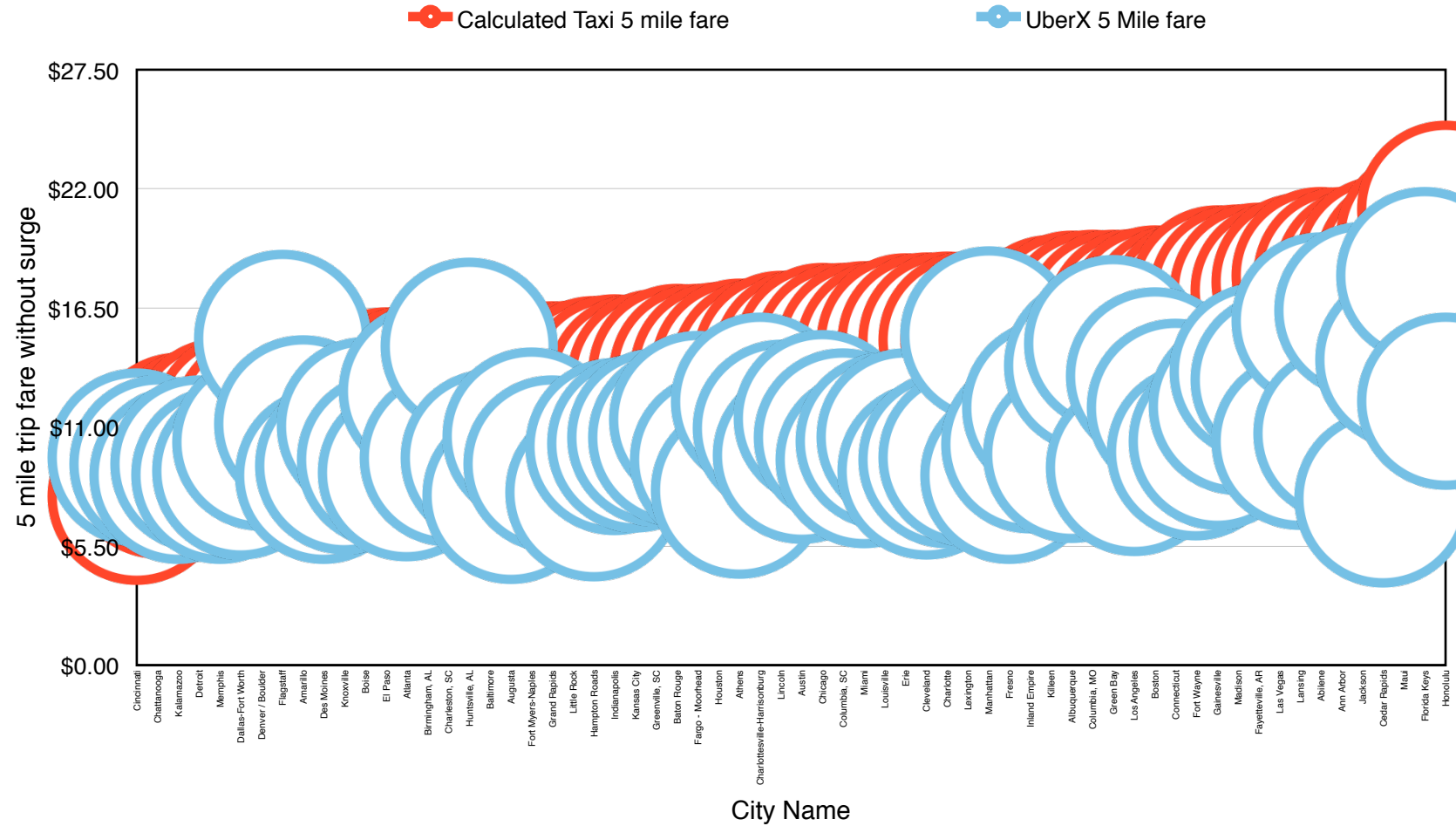
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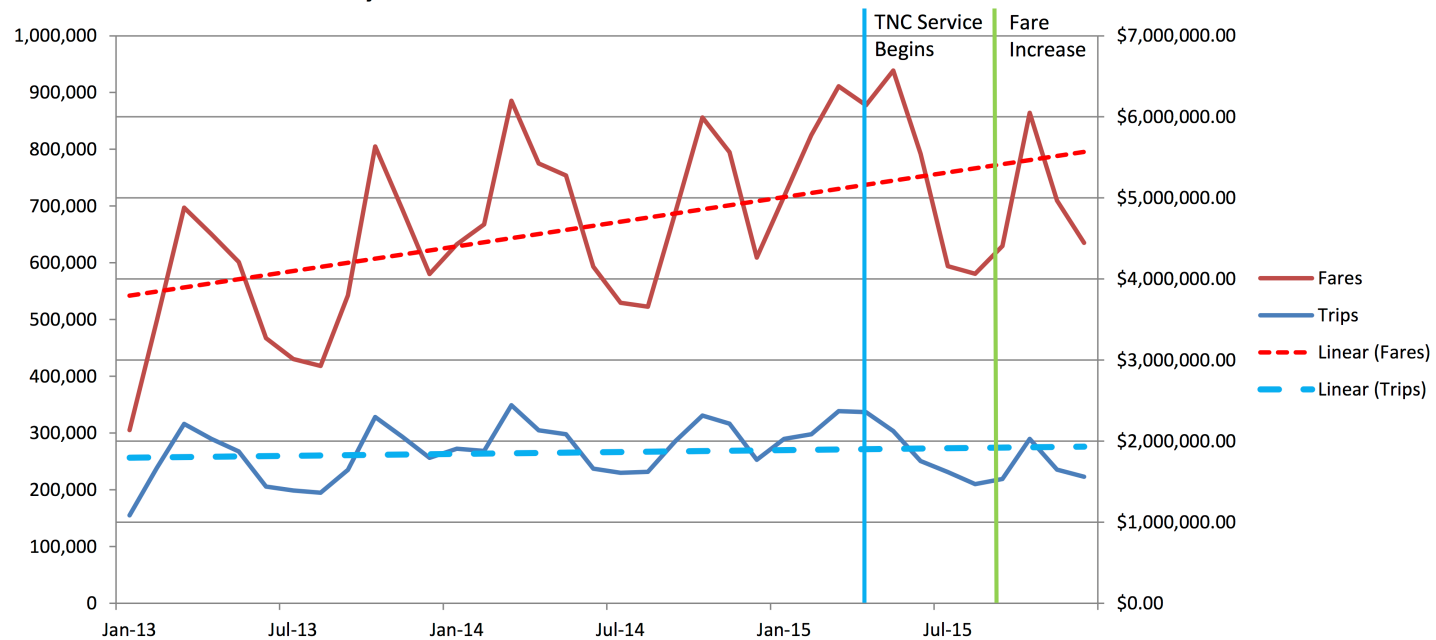


Facts and Figures: US and CA

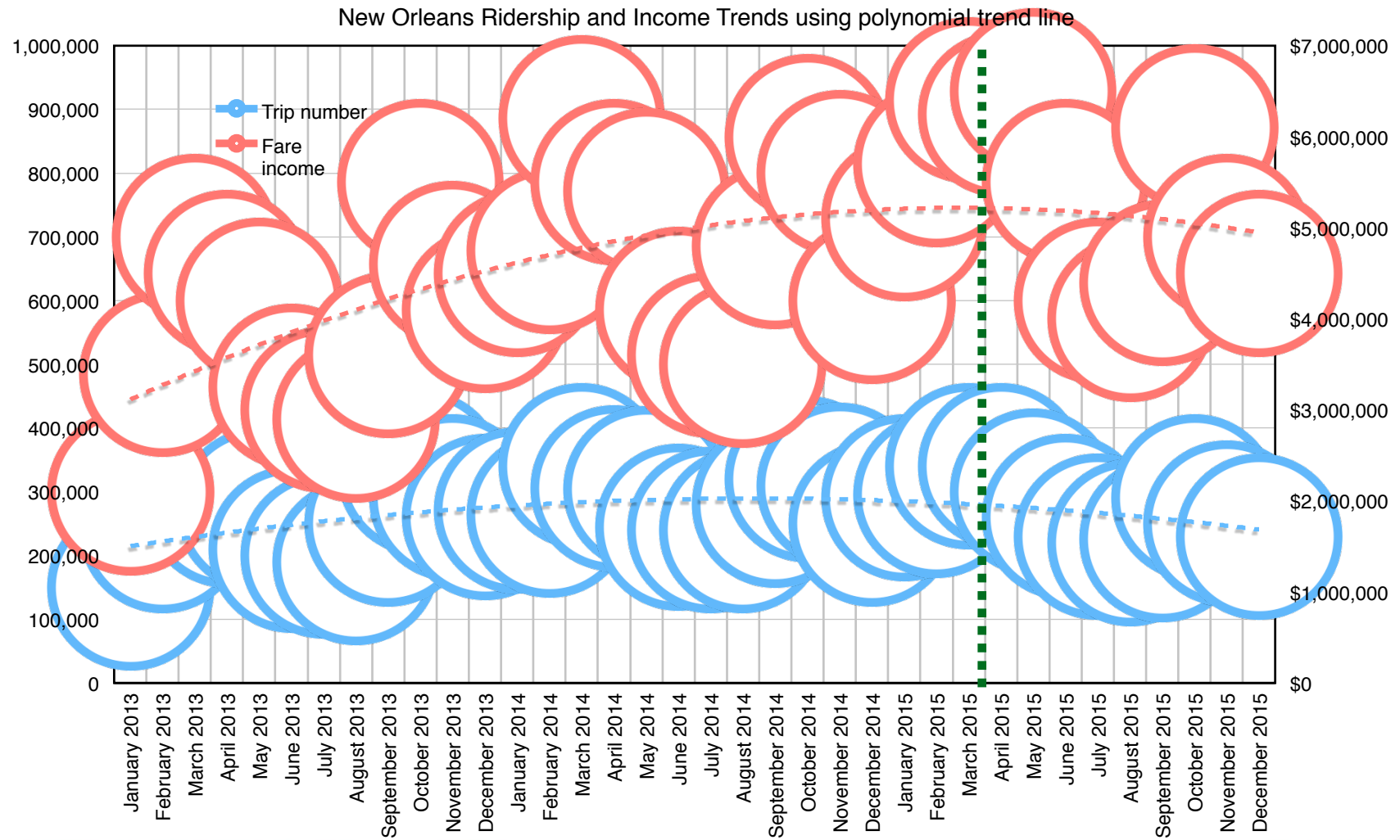


Taxicab Ridership Changes

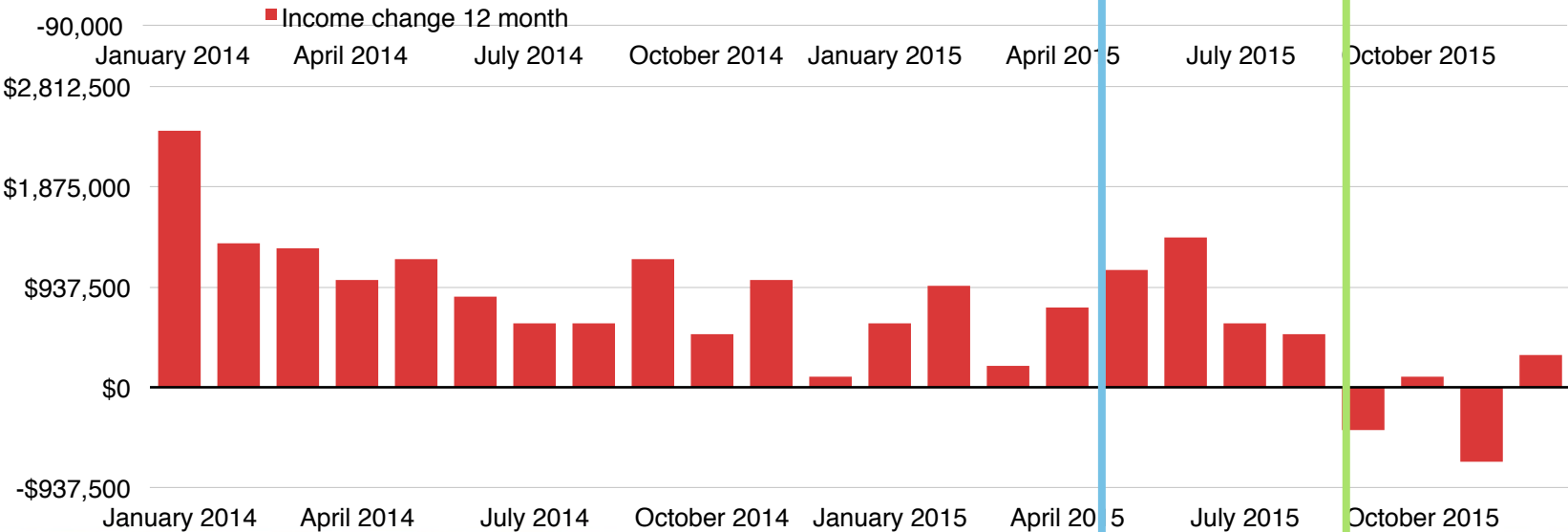
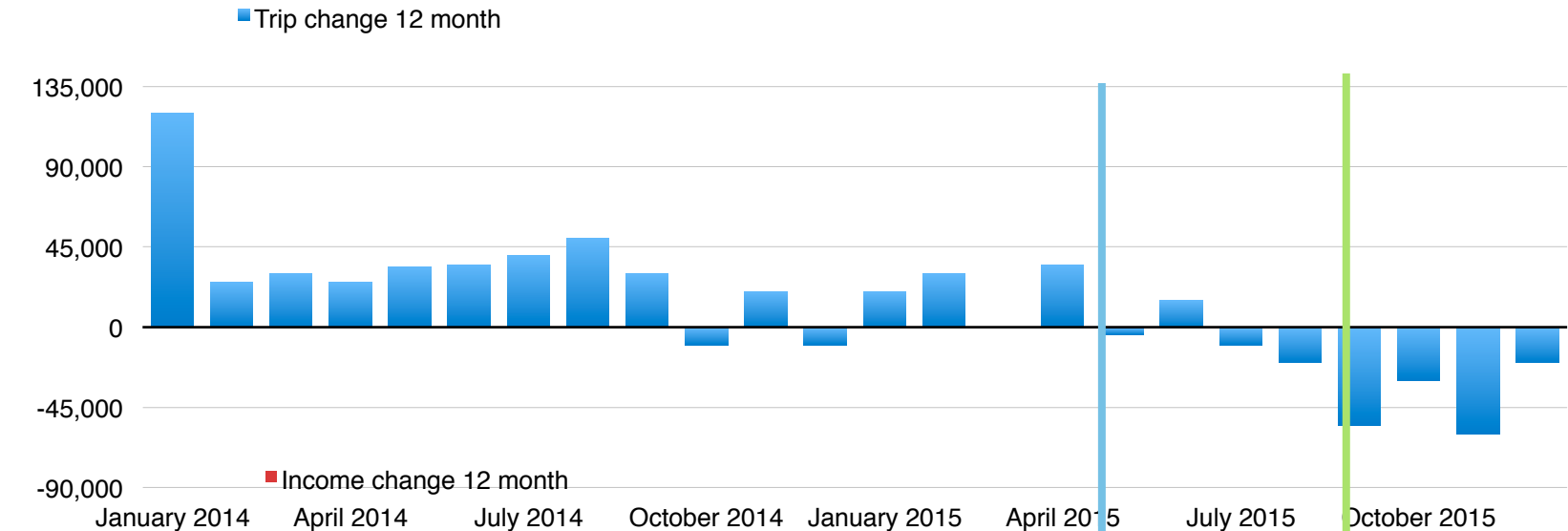
- Ridership essentially flat from 2013-2015.
- However, revenues increased.



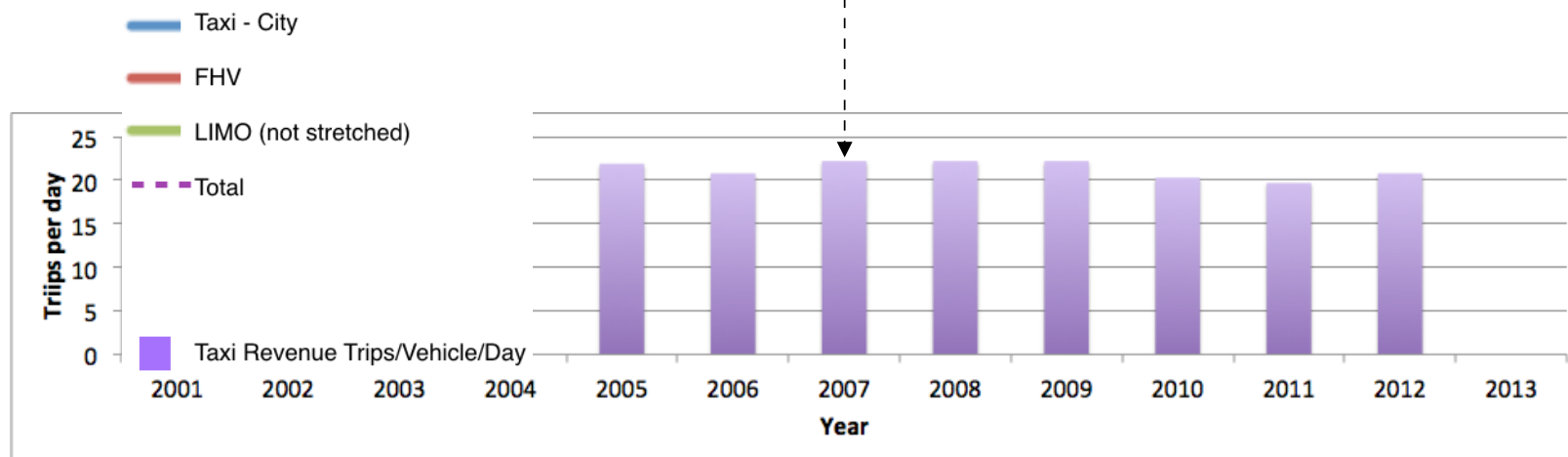
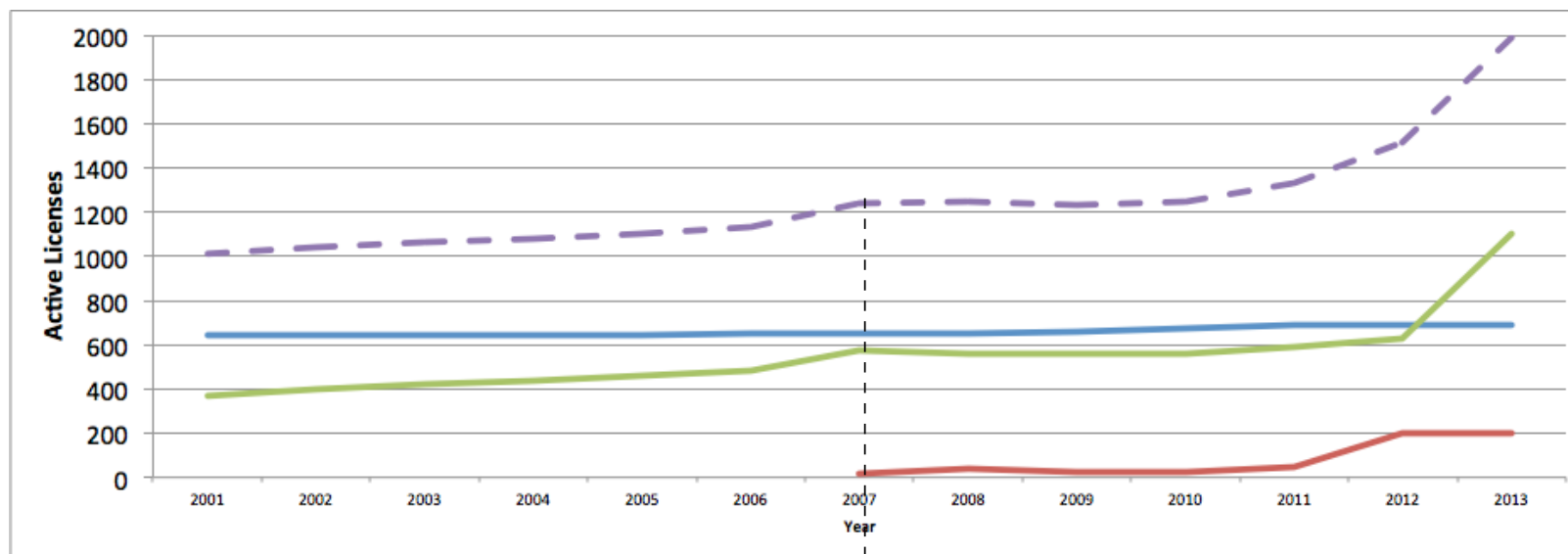
Facts and Figures: New Orleans



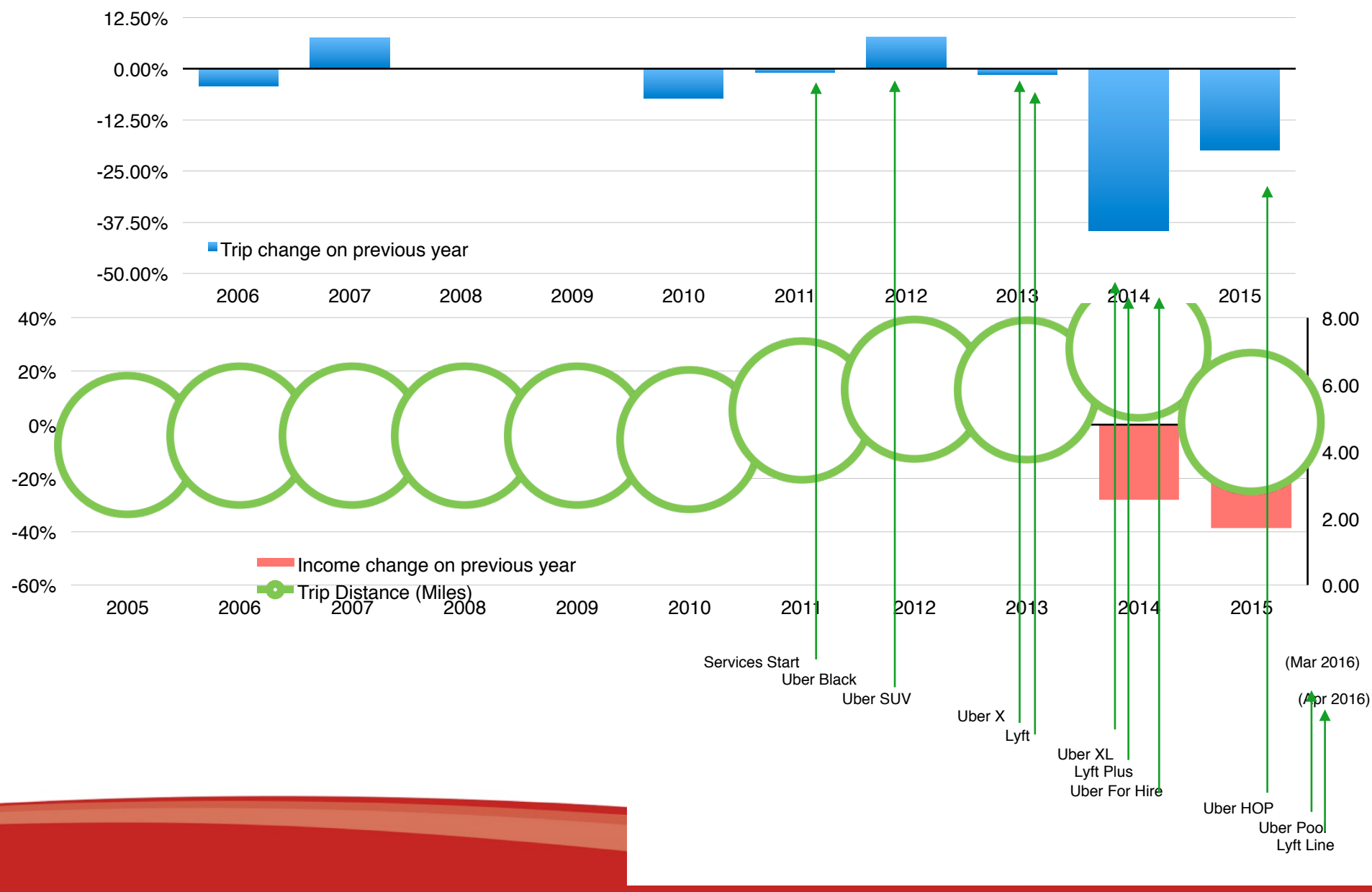
Facts and Figures



Facts and Figures: Seattle



Facts and Figures: Seattle



Can taxi regulation compete

	Taxi	Livery	TNC
Maximum numbers defined	✓	✓	✗
Licenses remain in the ownership of the city	✓	✓	✗
Defined process for increased numbers	✓	✓	✗
Obtain and hold liability insurance	✓	✓	✓
Provide evidence of individual driver insurance	✓	✓	✗
Requires certified mechanical inspection	✓	✓	✓
Security Camera required	✓	✗	✗
Must carry distinct signage eg: Roof sign	✓	✗	✗
Must Carry License plate	✓	✓	✗
May not display wording suggesting taxi service	✗	✓	✓
Must pass RCMP / equivalent background check (not fingerprint for TNCs)	✓	✓	✓
May operate from taxi stand	✓	✗	✗
May Operate from Street Hail	✓	✗	✗
May operate from dispatch	✓	✓	✓
Must apply approved fares	✓	✓	✗

- ✓ Yes, under regulatory control
- ✓ Yes, controlled by other agency
- ✓ Yes, controlled by 3rd party
- ✗ Is not generally applied

Can the taxi app compete (public)

	TNC*	Taxi
Can make bookings to differing vehicle types	✓	-
Can make bookings across differing cities	✓	-
Can be used to store card information and payment	✓	✓
Can be used to trace driver and route	✓	✓
Can provide fare estimate	✓	✗
Can charge booking fee	✓	✓
Can charge cancellation fee (how)	✓	✗
Can charge surge / dynamic prices	✓	✗
Can compete on price (how)	✓	✗
Can compete on quality	?	?
Can access pick up from airports!!!	✓	✗

- ✓ Yes, under regulatory control
- ✓ Yes, without direct regulation
- In limited circumstances only
- ✗ Not provided

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