










The New Services on the Block



Digital Cities, Smarter Transportation
UCLA Downtown LA Forum

March 20, 2014

What's a Transportation Network Company?

	Taxi	Charter-Party Carriers	Transportation Network Company	Rideshare/ Carpool
Arrangement	Ad-hoc via street hails & cab stands, also pre-arranged	Pre-arranged	Ad-hoc arrangement via app or website	Pre-arranged via app or website; casual carpool
Regulation	Municipalities permit companies & drivers; supply-constrained	State permits companies; employee-drivers	State permits TNCs, which approve drivers	Little if compensation < operations cost
Trip types	Passenger-serving	Passenger-serving	Mostly passenger-serving; shorter distance trips	Mutual-serving; long-distance or regular trips
Driver Compensation	\$\$\$	\$\$\$	\$\$	\$ / free
Brands	 UBER  TAXI MAGIC  YELLOW	 UBER  MUSIC EXPRESS	 Lyft Side·car uberX	 carma  zimride  rideamigos connecting people, one w

Attributes



Side•car

Services Offered	TNC	TNC, taxis, charter-party carriers	TNC
TNC Driver Background Check	Yes	Yes	Yes
User Sign-up Requirements	linked Facebook profile, mobile phone number, & credit card	mobile phone number, credit card or Google Wallet	Credit card, mobile phone number
Two-way ratings	Yes	Yes	Yes
Minimum rating threshold	drivers & passengers	drivers & passengers	drivers & passengers
TNC Culture	fist bumps, sit up front, creativity encouraged	no special culture	sit up front
Specified Destination	No	No	Yes
TNC Driver Compensation	Minimum fare, optional tip	set fares	variable fares
Minimum hourly compensation	in Beta cities	No	No
Reach	20 U.S. cities \$700M valuation	32 countries, 36 U.S. cities, \$3.5B	8 U.S. cities

TNCs in CA Must

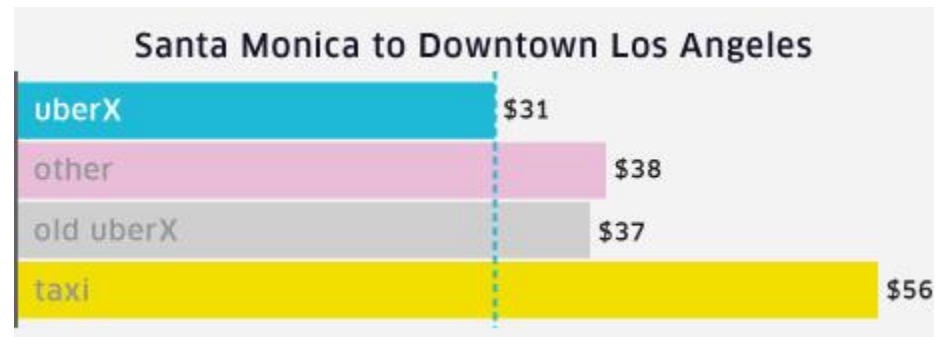
Safety	Drivers' Backgrounds	Vehicles
<ul style="list-style-type: none">maintain commercial liability of \$1M per incidenthave a zero-tolerance policy for intoxicating substancesreceive timely notice of changes in driving record from CA DMV	<ul style="list-style-type: none">conduct criminal background checks; exclude drivers with certain convictions within 7 yearsobtain drivers' records; exclude drivers with 3+ points or major violationssee that drivers possess a valid California drivers' license, are at least 21, and submit proof of insurance	<ul style="list-style-type: none">require 19-point vehicle inspections prior to operation and annuallyallow only street-legal passenger vehicles that are not significantly modifiedallow no more than 7 passengersrequire "trade dress" on vehicles
Rides	Social Concerns	Apps
<ul style="list-style-type: none">drivers cannot accept street hails	<ul style="list-style-type: none">ensure no unlawful discrimination for ratingsTNCs must collect data on rejected requests and origin & destination of completed trips	<ul style="list-style-type: none">must display a picture of the approved driver and vehicle prior to a rideallow passengers request a wheelchair-accessible vehicleallow DUI complaints

Price Wars



UberX – price cut

- UberX cuts prices in many markets on January 9th




Sidecar – “Right Price”


- Passengers can offer lower prices
- Drivers can accept lower prices
- February 19th

AT&T 4:15 PM

Favorite



5 minutes to Pickup



\$14 Ride Price

Lauryn
'13 Red Toyota Prius
CA 6TUP861

I've lived in the Bay Area for 7 years. Hop in and I'll take you around town!


Request Lauryn

AT&T 4:15 PM

Choose Driver


360 Pine St., San Francisco

West of Pecos



Elizabeth ★
'12 Honda Civic

7 min. ETA | \$10



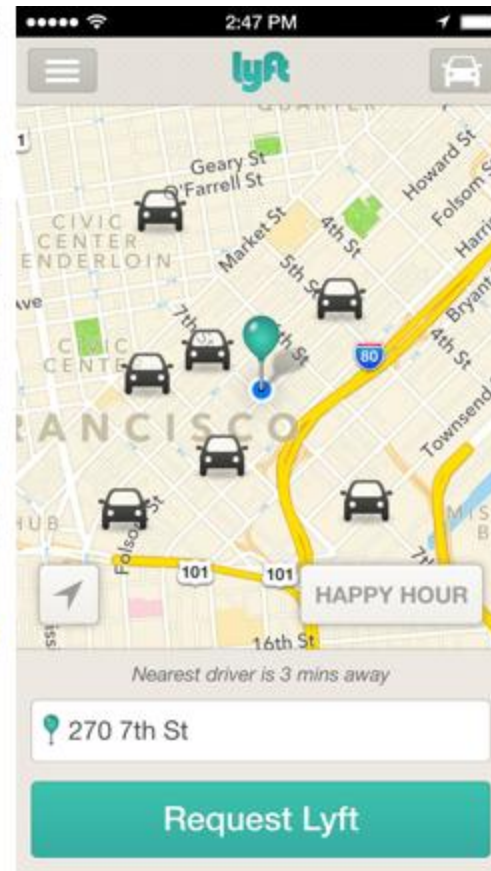
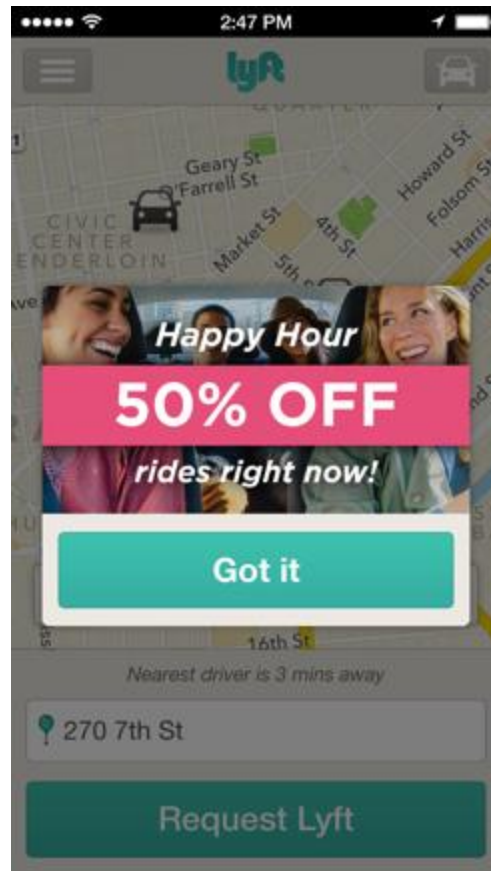
Lauryn
'13 Toyota Prius

5 min. ETA | \$14

Lyft – “Happy Hour”

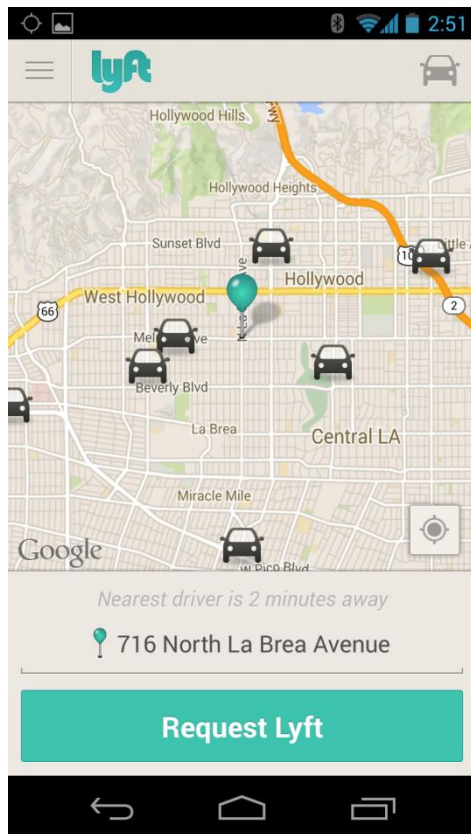
Lyft Is Now the Most Affordable Option at All Times

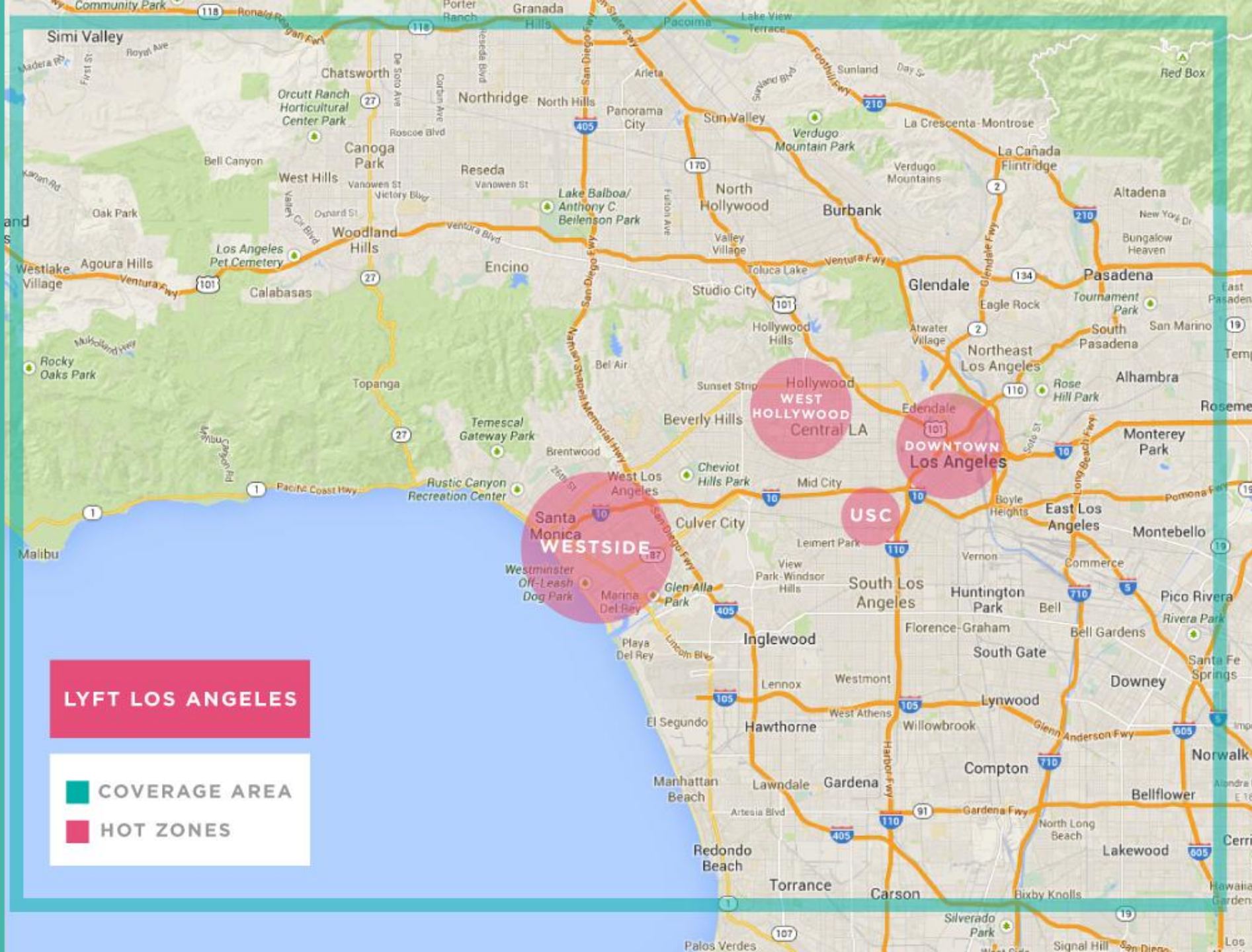
March 18



TNC Ride Along

Nearby Vehicles

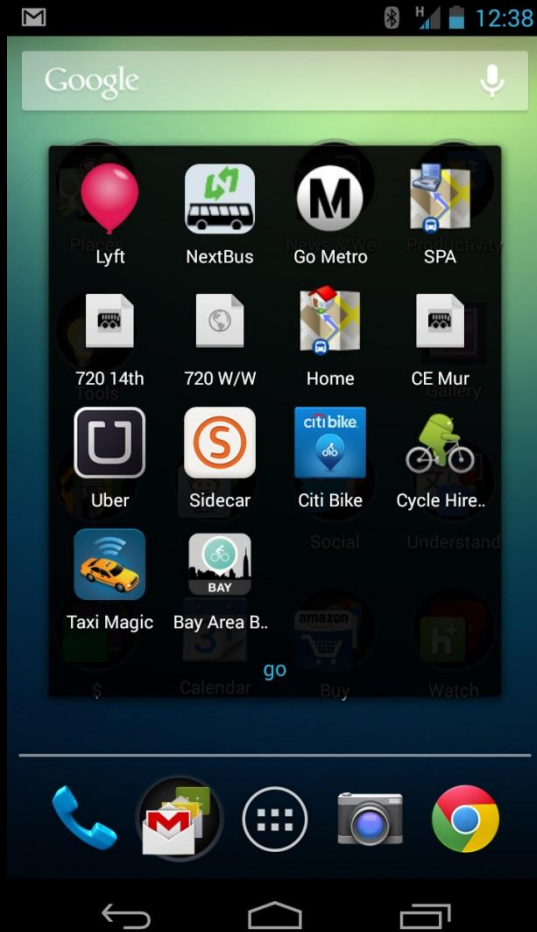




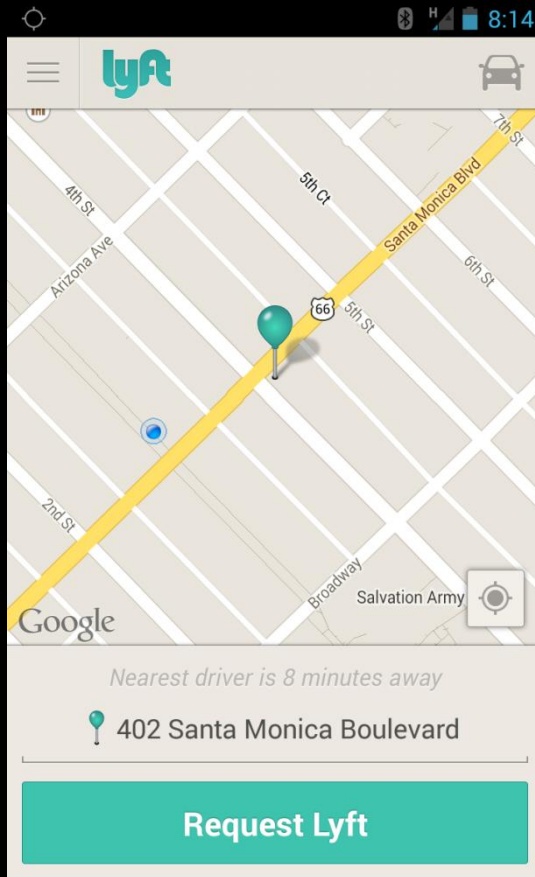
LYFT LOS ANGELES

-  COVERAGE AREA
-  HOT ZONES

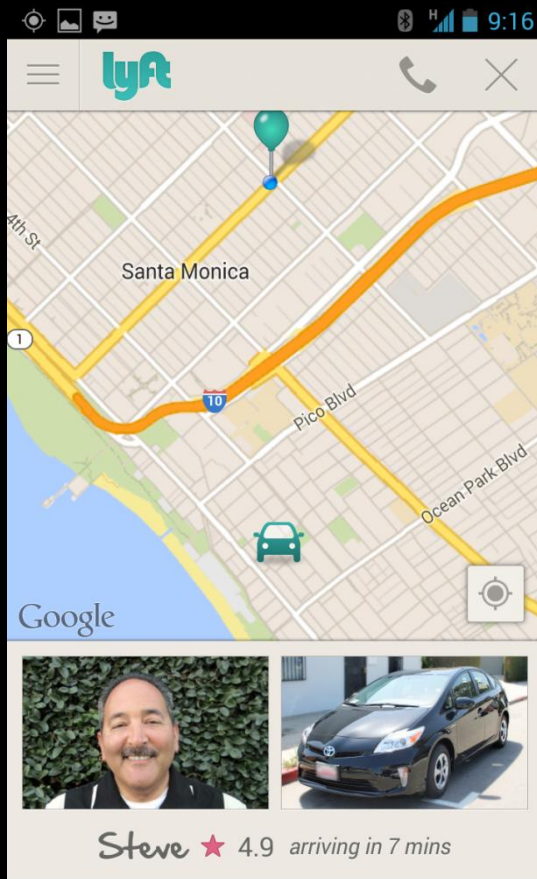
Lyft Ride Along



Lyft Ride Along



Lyft Ride Along



Lyft Ride Along



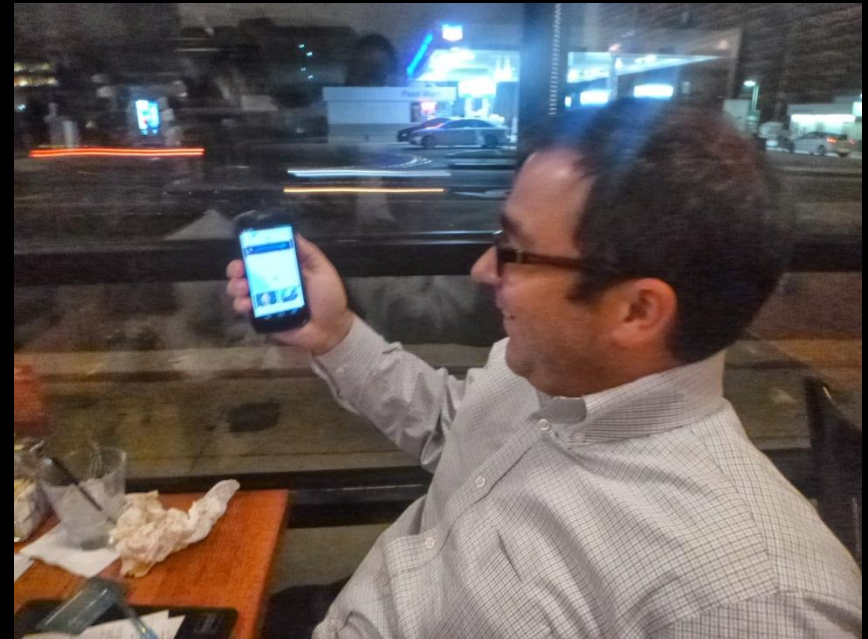
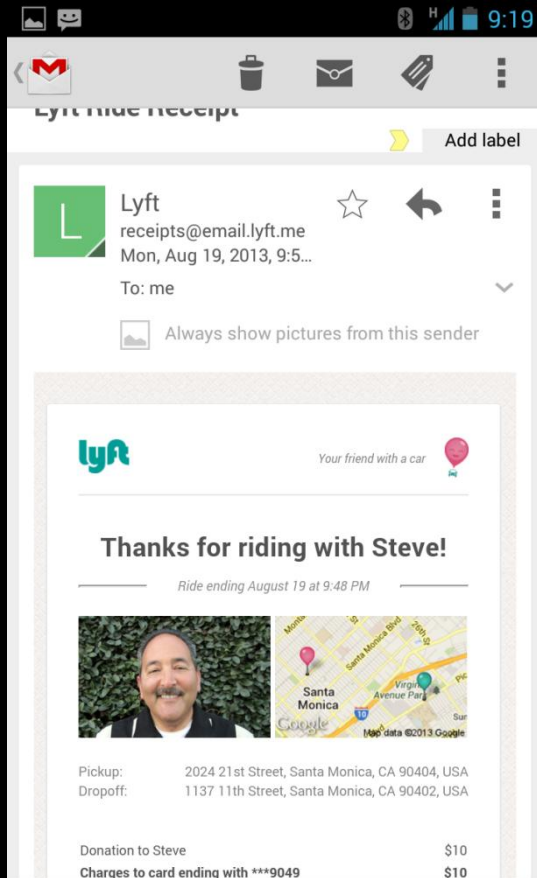
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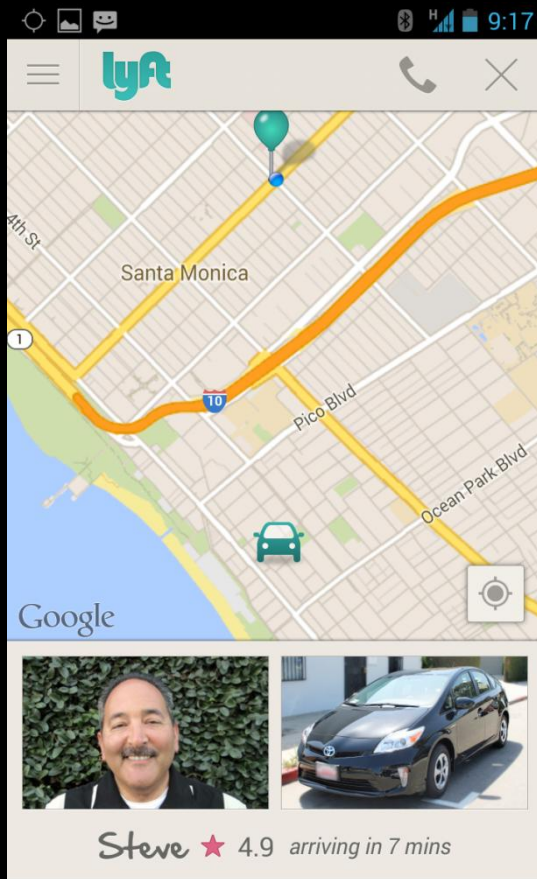
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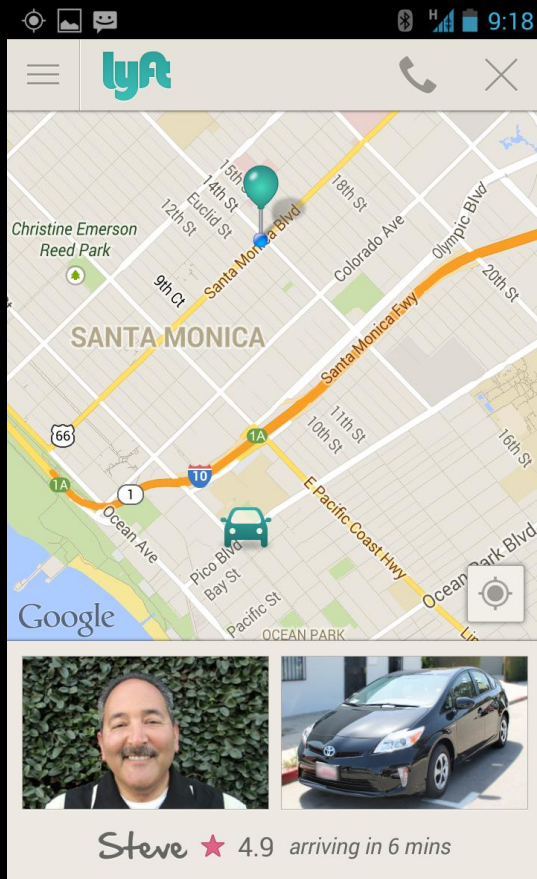
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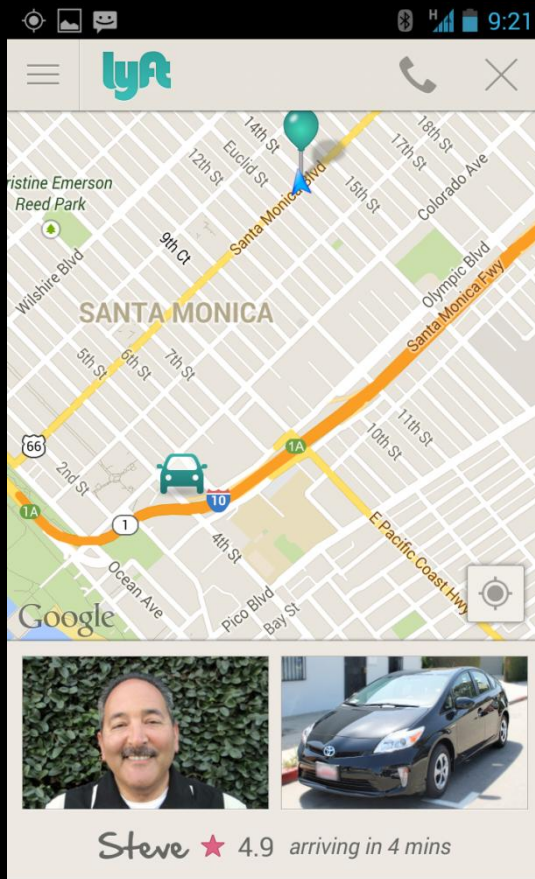
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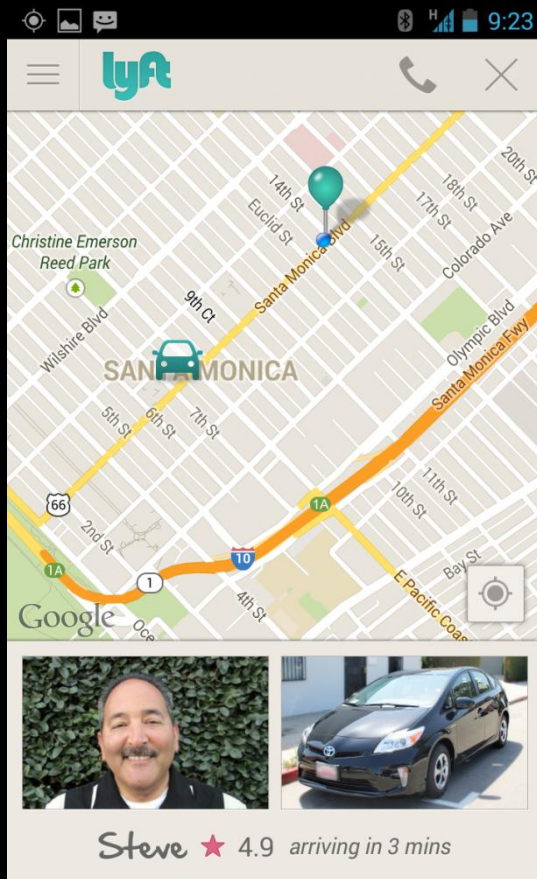
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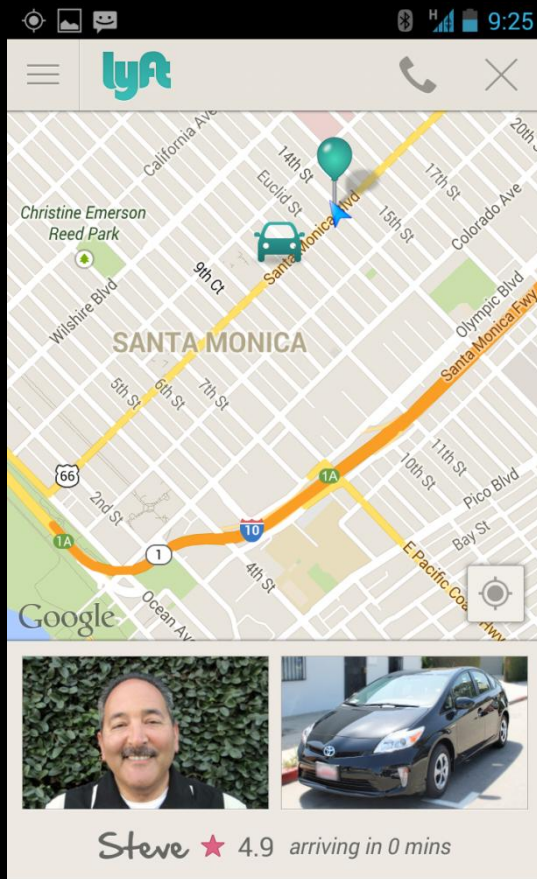
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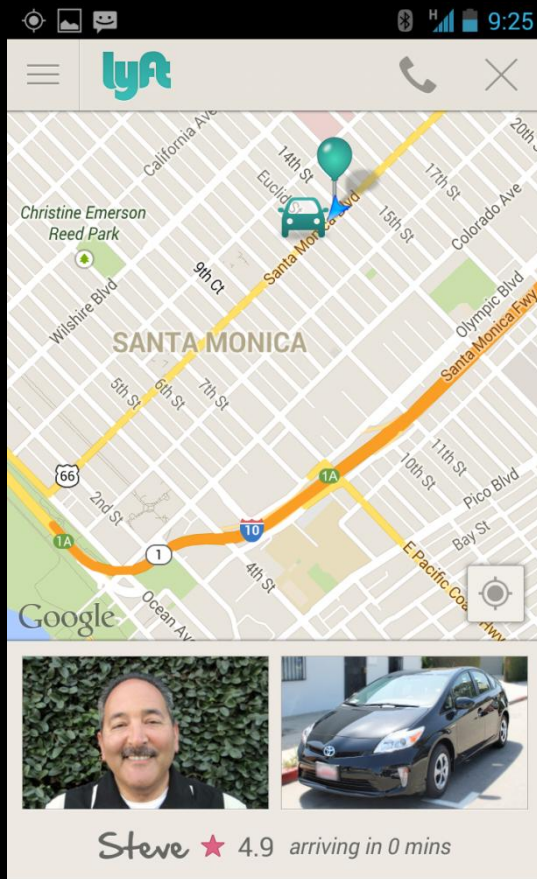
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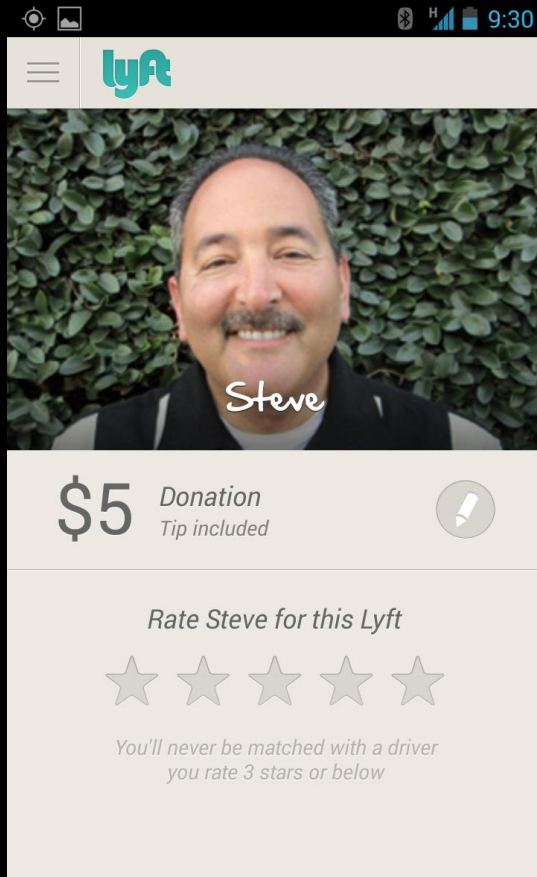
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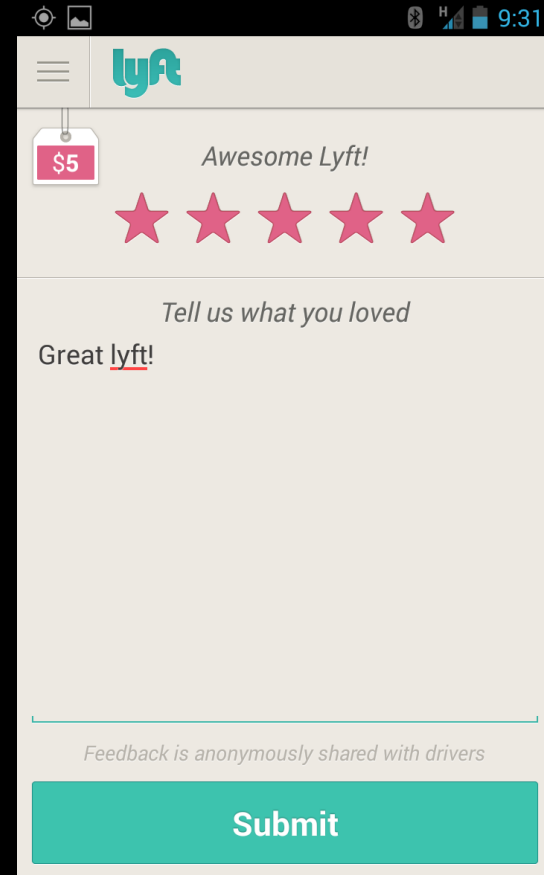
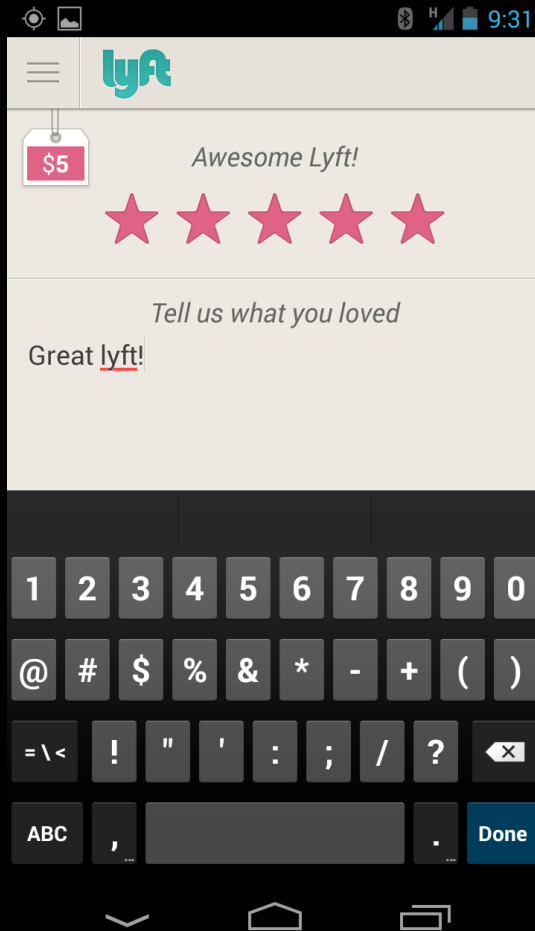
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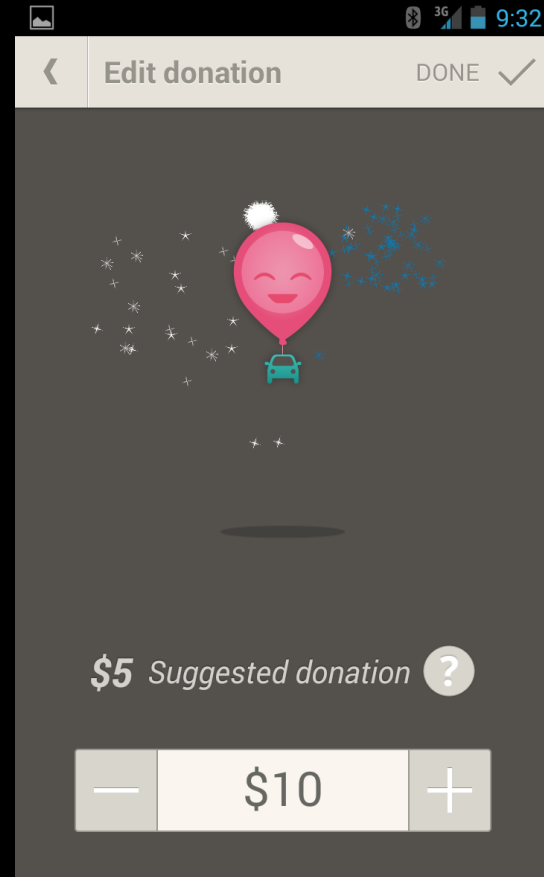
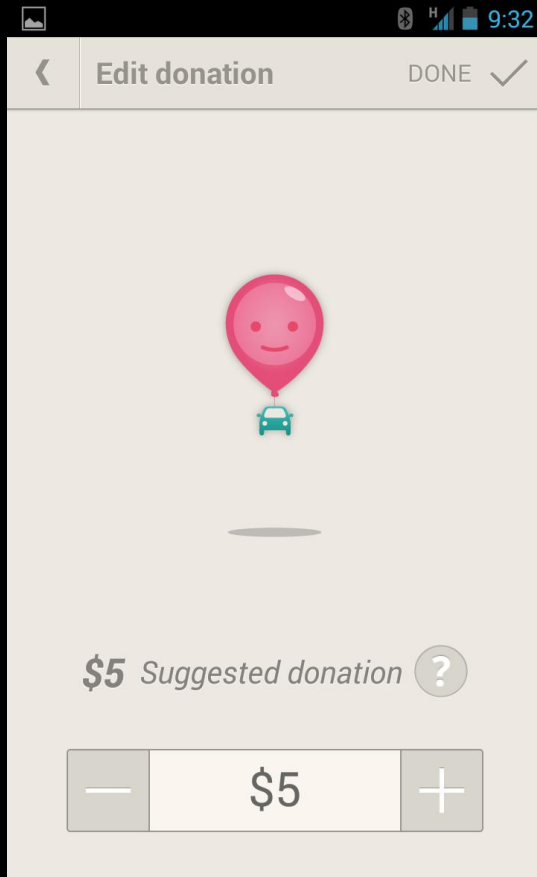
Lyft Ride Along



Lyft Ride Along



Lyft Ride Along



Better Coverage? Oversupply?

