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A REPORT TO
THE CITY OF TORONTO

Quantitative Online Survey Findings (Phase 1)

Vehicle-for-Hire Bylaw Review City of Toronto Resident Survey

June 2019

TABLE OF CONTENTS

About the Research	3
Key Findings	5
Detailed Findings	
1 Understanding Behaviour	12
2 Attitudes and Behaviours	22
3 Accessible Service	32
About the Respondents	38
Appendix	40

1

ABOUT THE RESEARCH

Background & Objectives

The City of Toronto Municipal Licensing and Standards Division provides bylaw administration and enforcement services for Toronto, including the licensing and enforcement of vehicles-for-hire, such as taxicabs, limousines and Private Transportation Companies (PTCs), like Uber and Lyft.

The City last conducted research of its vehicle-for-hire industry in 2015. In May 2016, Toronto City Council adopted a series of recommendations to establish new regulations for this industry to ensure public safety, consumer protection, and equitable access to accessible vehicles.

The City of Toronto released a work plan for a bylaw review in June 2018. As part of this review, public opinion research was required to better understand residents' attitudes, experiences and satisfaction with the vehicle-for-hire industry, as it relates to regulations, since the implementation of the bylaw in 2016.

This research was undertaken in two phases:
Phase 1 – a quantitative online survey; and
Phase 2 – qualitative focus groups.

This report represents the findings from the quantitative online survey.

Methodology



Phase 1 of the research involved conducting a representative online survey of n=1007. Respondents were drawn from an online panel.



The fieldwork was conducted between February 20th and March 1st, 2019. On average, the survey took respondents 10 minutes to complete.



A sampling plan was developed to ensure a representative cross section of Torontonians by gender, age, district and socioeconomic status, reflective of the most recent Statistics Canada data. An oversample was undertaken in Etobicoke/York to achieve a minimum sample size of n=200 and the data was weighted by district back to the 2011 Census.

	2011 Census	2018 Sampling Plan	2018 Actual Weighted
District	%	n	n
Old Toronto/East York	32.6	320	326
Etobicoke/York	18.4	200	184
North York	25.1	240	251
Scarborough	23.9	240	239

Legend

↑ Means significantly **higher** at 95% CL

↓ Means significantly **lower** at 95% CL

2

KEY FINDINGS

1

There has been a shift in behaviour since 2015, moving away from the use of taxicabs and limousines, towards using Private Transportation Companies.

More than four-in-ten (44%) Toronto residents have used PTCs within the last year, which is double the amount from 2015 (21%). Meanwhile the use of other vehicle-for-hire services, such as taxicabs (35%) and limousines (5%) has decreased.

Four-in-ten (44%) PTC users report using the service more often than they did a year ago, and six-in-ten report (59%) taking taxis less often compared to before they started using PTCs.

2

Seven-in-ten residents that have used a PTC vehicle in the past 12 months report they have switched from using taxicabs to PTCs. The main reasons cited for using a PTC vehicle are cost, convenience and quality of service.

Among those who have used a PTC vehicle in the past 12 months, cheaper cost (89%) and convenience – ability to order (89%) and pay using a mobile app (86%) – are the main reasons they use the service. Eight-in-ten (78%) also indicate that quality of service is a main reason.

3 **Four-in-ten respondents who indicate not having used PTC services before say they would be likely to do so in the future.**

This is primarily due to its affordability (24%) and convenience (16%).

4 **Age has a significant impact on satisfaction with services provided by PTCs and vehicle-for-hire companies.**

Younger users, aged 18-34, are significantly more satisfied with PTC's customer service, safety and cleanliness than are the older age cohorts. The reverse is true for taxicabs and limousines.

'I am satisfied with the level of customer service offered by PTCs'
AGE: 18-34 76%↑; 35-54 65%; 55-64 43%; 65+ 25%↓

'I am satisfied with the level of customer service offered by taxicabs'
AGE: 18-34 43%↓; 35-54 61%; 55-64 58%; 65+ 70%↑

This split by age is also consistent when asked about safety and cleanliness.

5 The primary uses for a vehicle-for-hire are fairly consistent across providers, with the exception of limousines.

Torontonians generally hire a PTC or taxicab for the purpose of going to/from a late night activity, when they are running late or travelling to/from the airport. However, the use of taxicabs is reported with less frequency than PTCs across all activities.

Limousines are primarily used for transportation to/from the airport.

6 While Private Transportation Companies provide their customers a wide range of service offerings, residents in Toronto primarily use a standard PTC service.

Two-thirds (67%) of PTC users choose to use a Standard Lyft Ride or UberX service. However, there is also a large proportion (41%) who take a shared or pooled service. These tend to be younger users, 18-34 years of age.

7 In terms of regulations, there is the strongest expectation that drivers must take safety training and customer service training. This is followed by regulations for markings to identify vehicles that are for hire.

While eight-in-ten residents think there should be safety training for drivers of both PTC vehicles and taxicabs, there is a significantly higher expectation that taxicab drivers take customer service training compared to PTC drivers.

8 Specifically, there is the most support for drivers having to complete training for city navigation, pick-up/drop-off safety, customer service, and distracted driving.

And, almost half of residents believe there should be training for accessible service and diversity and inclusion.

Women are more likely than men to think that drivers for PTCs and taxicabs should receive training for all of these areas, significantly so for city navigation, pick-up/drop off safety, and accessible service.

Similar to results for regulations, there are differences in training expectations between PTC and taxicab drivers: more think that taxicab drivers (76%) should receive customer service training compared to PTC drivers (65%). This is also the case for diversity and inclusion training: 50% for taxicab drivers compared to 44% for PTC drivers.

9 Nine-in-ten residents agree that PTC vehicles should be held to environmental and emission standards.

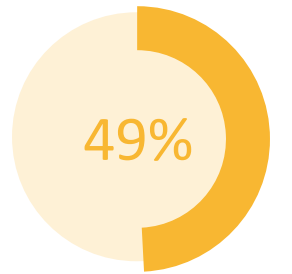
There are similar levels of agreement for requiring taxicabs and PTC vehicles to have mirrors on rear passenger doors (78% and 75%, respectively) – as well as PTC vehicles being required to have cameras within their cars (78%).

10 There seems to be a lack of knowledge when it comes to wheelchair-accessible vehicles.

Three-quarters or more are aware that you can request a wheelchair-accessible vehicle through a taxicab service or that these vehicles are not only for TTC Wheel-Trans users. However, there is more uncertainty about whether a wheelchair-accessible taxicab costs the same metered fare as a sedan taxicab, if a wheelchair-accessible vehicle is only for people requiring this service and cannot be hailed for the non-accessible users, and if you can request a wheelchair accessible vehicle through a PTC.

Willingness to use this type of vehicle is influenced by age, with those aged 18-34 significantly more likely to say they would not use wheelchair-accessible vehicles and those aged 65+ significantly more likely to say they would.

Profile of Users



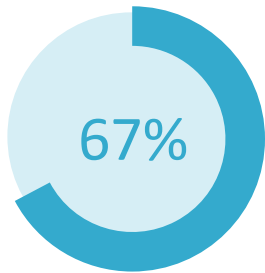
USE A TAXICAB AT LEAST ONCE A MONTH



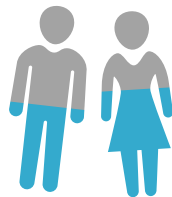
47% 53%



**PRIVATE
TRANSPORTATION
COMPANIES (PTC)**



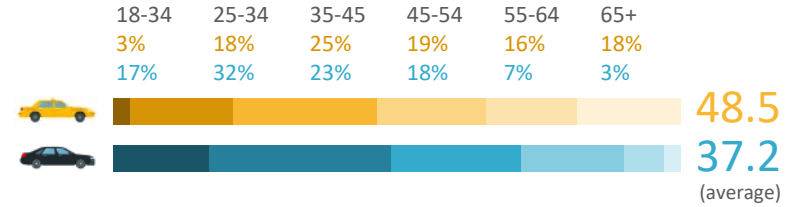
USE A PTC AT LEAST ONCE A MONTH



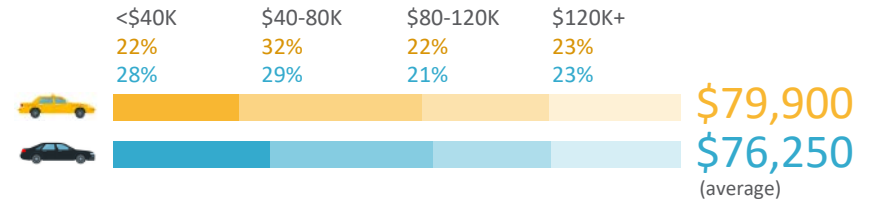
43% 56%

1%
Other
Gender
Identity

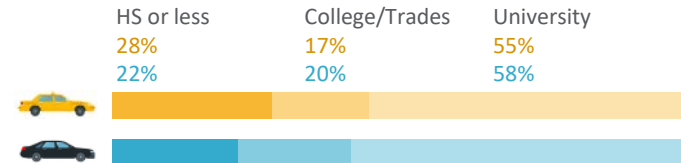
Age



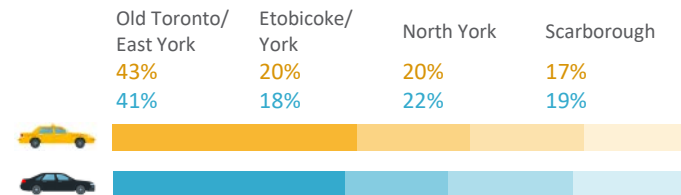
Income



Education



District



3

DETAILED FINDINGS

Understanding Behaviour

Attitudes and Behaviours

Accessible Service

TYPES OF TRANSPORTATION USED IN TORONTO IN THE PAST TWELVE MONTHS

Over the past four years, the reported use of Private Transportation Companies has increased, while taxicab and limousine use has decreased.

- The vast majority of Toronto residents have used public transit, walked, or drove in the past year.
- About two-in-ten report that they have carpooled (27%) or biked (21%) within the last 12 months.

	2015	2019	2019 DEMOGRAPHIC RESULTS
Public transit	88%	84%	↑ Age 18-34 (93%)
Walk	n/a	80%	↑ Age 18-34 (86%)
Drive (either yourself and/or another member of your household)	n/a	70%	
Private Transportation Companies (such as Lyft and Uber) (only Uber in 2015)*	21%	44% ↑	Age 18-34 (65% ↑), Women (47% ↑), Age 65+ (13% ↓)
Taxicab*	58%	35% ↓	↑ Age 35-54 (40%)
Carpool (i.e., with friends, family, colleagues)	n/a	27%	↑ Age 18-34 (46%)
Bike	n/a	21%	
Limousine*	17%	5% ↓	↑ Age 65+ (9%)
None of the above	8%	1%	↑ Age 65+ (4%)

- * The use of vehicle-for-hire services is higher for:
- Residents of Old Toronto/East York: PTC (52%), Taxicab (47%), Limousine (8%)
 - Those with a higher socio-economic status

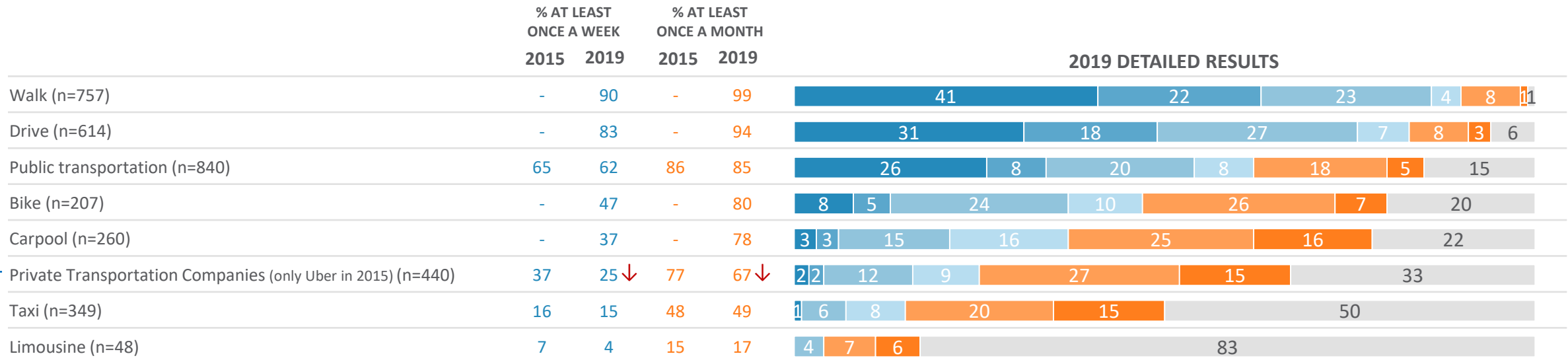
Q2.1 (Q3 in 2015) Which, if any, of the following types of transportation have you used in the City of Toronto in the past 12 months? Please select all that apply.

Base: Total Sample (2015 n=1004; 2019 n=1007)

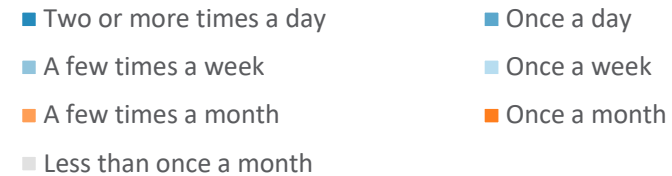
FREQUENCY OF TRANSPORTATION USAGE IN THE PAST 12 MONTHS

While more Torontonians report using PTCs in 2019, the frequency at which they use these services may have decreased since 2015. The use of taxicab and limousine services has remained relatively stable over the last four years.

- Over nine-in-ten Torontonians walk (99%) or drive (94%) at least once a month, making these the most frequently used transportation options.
- Torontonians continue to say that they also frequently take public transit, with six in ten (62%) stating they take it at least once a week.



Those living in Scarborough (31%), Old Toronto/East York (30%) and younger respondents, aged 18-34 (27%) are more likely to use PTCs at least once per week.

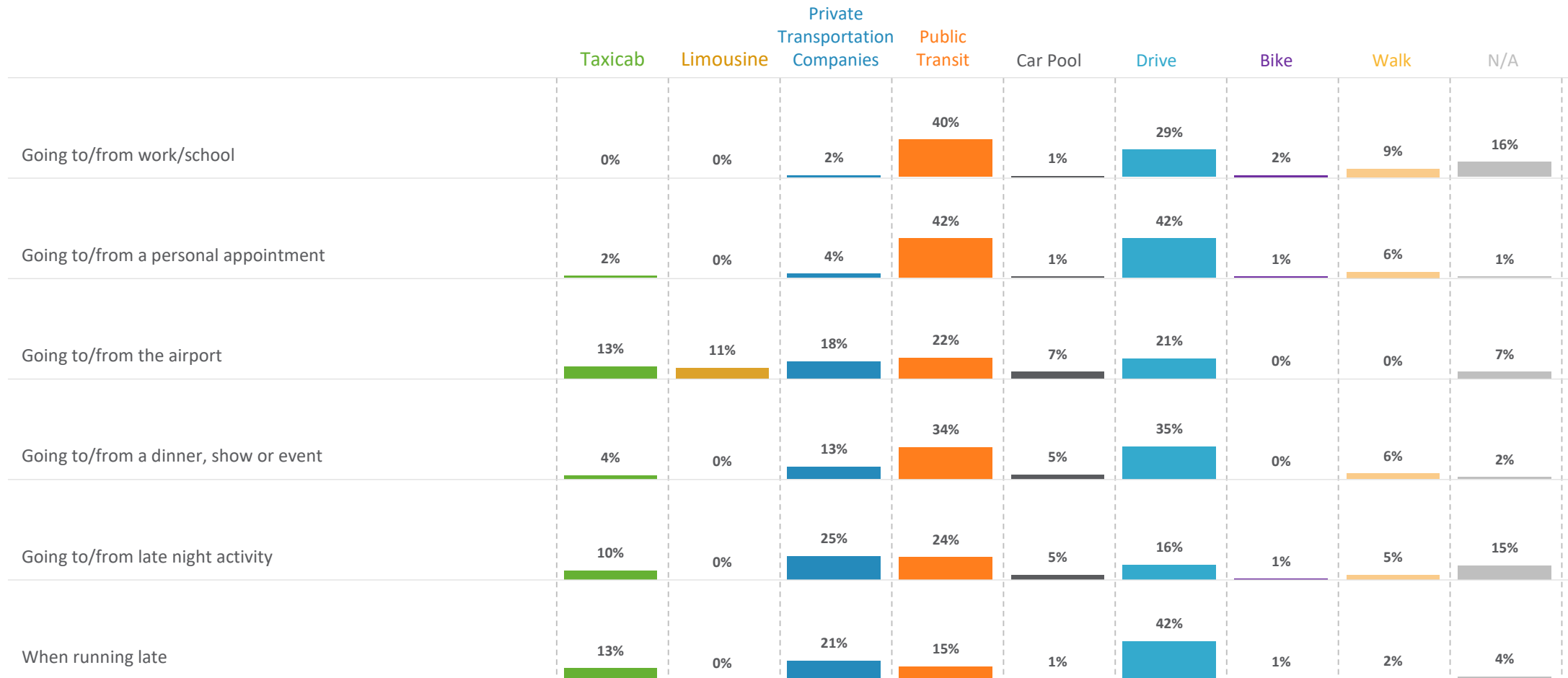


Q2.2 (Q4 in 2015) How often, on average, have you used the following types of transportation in the past 12 months?
 Base: Have used taxi, limousine, private transportation companies and/or public transit in past 12 months (2015 n=VARIES; 2019 n=VARIES)

PRIMARY MODE OF TRANSPORTATION BY ACTIVITY

In 2019, Toronto residents are most likely to use a PTC when going to/from a late night activity (25%), when they are running late (21%), or travelling to/from the airport (18%).

- Taxicabs are used for similar activities as PTCs, although with less frequency. Limousines are used primarily for going to and from the airport.
- Overall, Torontonians are most likely to take public transit or drive to participate in these six activities.



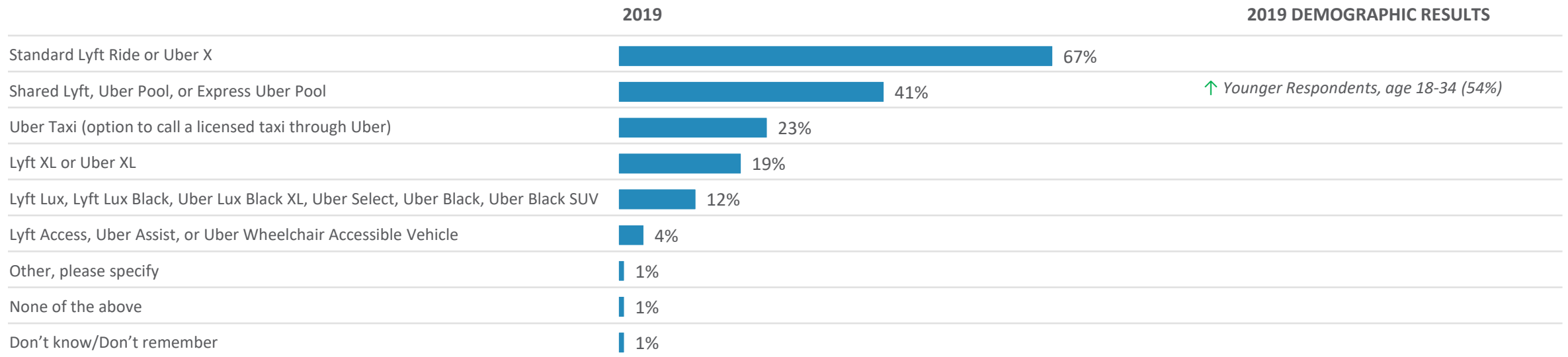
Q2.3 For each of the following, please identify which mode of transportation you are most likely to take.
 Base: Total Sample (2019 n=1007)

Those living in Old Toronto/East York and Etobicoke/York are significantly more likely to take PTCs for a late night activity or dinner/show/event (and when running late among those living in Old Toronto/East York).

USE OF PRIVATE TRANSPORTATION COMPANY SERVICES IN THE PAST 12 MONTHS

Two-thirds (67%) of those who have used a PTC in the last year have taken a standard service such as a Standard Lyft Ride or UberX. Another four-in-ten (41%) indicate using a shared or pooled offering.

- Two-in-ten Toronto residents have used Uber Taxi services.
- Only 4% of those who have used a PTC have taken a wheelchair-accessible vehicle.
- There are no significant differences by region of the City.



Q2.4 Which of the following types of Private Transportation Company services have you used in the past 12 months? Please select all that apply.

Base: Use Private Transportation (2019 n=448)

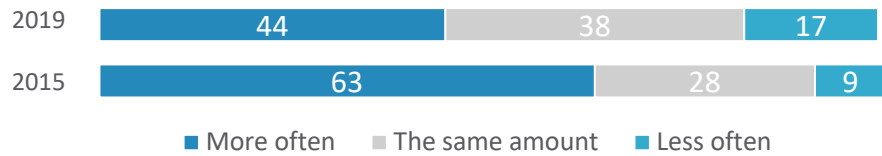
PRIVATE TRANSPORTATION AND TAXI USAGE

The demand for Private Transportation Companies remains high, with the four-in-ten PTC users reporting that they take these services more often than they did a year ago. The majority of PTC users (59%) also indicate using taxicabs less often, suggesting a change in behaviour over the last four years.

- The proportion of PTC users who say they use taxicabs less often has increased by 13 percentage points compared to 2015.



PRIVATE TRANSPORTATION COMPANY USAGE COMPARED TO 12 MONTHS AGO



TAXICAB USAGE COMPARED TO BEFORE USING PRIVATE TRANSPORTATION COMPANIES



- More often *Age 35-45 (66%↑)*
- The same amount *Age 65+ (40%↑ Residents of Old Toronto/East York (29%↑))*
- Less often *Younger respondents, age 18-34 (18%↑) Women (14%↑)*

Q2.5 (Q6 in 2015) Would you say that you use Private Transportation Companies (such as Lyft and Uber) more often, less often, or the same amount as you did 12 months ago? (2015 phrasing) Would you say that you use Uber more often, less often, or the same amount as you did 12 months ago?

Q2.6 (Q7 in 2015) Would you say that you use taxicab services more often, less often, or the same amount as you did before you started using Private Transportation Companies (such as Lyft and Uber)? (2015 phrasing) Would you say that you use taxi services more often, less often or the same amount as you did before you started using Uber? If you did not use taxi service before you started using Uber please say so.

Base: Have used Uber (2015 n=210), Use Private Transportation (2019 n=448)

LIKELIHOOD OF USING TAXICAB IN FUTURE

Among those who haven't used a taxicab in the past 12 months, almost four-in-ten would be likely to use one in the future. This finding remains unchanged from 2015.

- In 2019, more respondents indicated that they are 'not likely at all' to use a taxicab in the future.

	2015	2019
TOTAL LIKELY	37	37%
Very Likely	8	8%
Somewhat Likely	29	29%
Somewhat Unlikely	40	32%
Not likely at all	23	31% ↑
TOTAL SOMEWHAT UNLIKELY/NOT LIKELY AT ALL	63	63%

Q2.7 (Q8 in 2015) You mentioned that you have not used a taxicab in the past 12 months. How likely would you be to use a taxicab service in the future?

Base: Have not used a taxicab (2015 n=419; 2019 n=648)

REASONS FOR USING A TAXICAB IN THE FUTURE

Those likely to use a taxicab in the future indicate that they would do so in an emergency situation or because they simply prefer to use this type of service.

- Among those ‘unlikely’ to use a taxicab, many cite because it is too expensive (29%).

REASONS FOR “**LIKELY**” TO USE A TAXICAB IN THE FUTURE

2015 2019

	2015	2019
Emergency situation/only if I really need it	5	24%
Would rather use taxis/prefer to support taxicab drivers	-	18%
Ease/convenience	4	14%
To go to/from the airport	4	10%

Mentions of 10% and above for 2019

REASONS FOR “**UNLIKELY**” TO USE A TAXICAB IN THE FUTURE

2015 2019

	2015	2019
Costly/too expensive	23	29%
I have a car/prefer to drive myself	23	18%
I use/prefer PTCs	-	14%
No need for it/not interested	8	12%
I use/prefer/cheaper to take public transportation	15	11%
Rude drivers/terrible service/don’t drive well	-	11%
Cheaper to use PTCs	-	10%

Mentions of 10% and above for 2019

LIKELIHOOD OF USING PRIVATE TRANSPORTATION COMPANY IN THE FUTURE

There is a higher likelihood (in 2019 vs 2015) that non-PTC users will begin to use these services in the future.

- Among those who have not used PTC services, almost four-in-ten indicate they would be likely to use PTC services in the future.



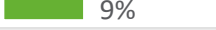
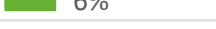
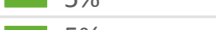


	2015	2019		
TOTAL LIKELY	29	38%	↑	AGE: 18-34 60%↑; 35-54 48%↑; 55-64 31%; 65+ 18%↓
Very Likely	6	12%		
Somewhat Likely	23	26%		
Somewhat Unlikely	29	25%		
Not likely at all	42	37%		
TOTAL SOMEWHAT UNLIKELY/NOT LIKELY AT ALL	71	62%	↓	

REASONS FOR USING A PRIVATE TRANSPORTATION COMPANY IN THE FUTURE

Those likely to start using PTCs mention that it is cheaper and more convenient to use compared to the alternative vehicle-for-hire services.





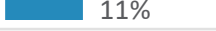

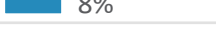
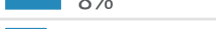

- The primary reasons one would be unlikely to use PTC is if they do not have a need for it (19%) and view them as unreliable/not trustworthy (17%).

REASONS FOR “**LIKELY**” TO USE A PRIVATE TRANSPORTATION COMPANY IN THE FUTURE

	2015	2019
Cheaper/more affordable	7	 24%
Ease/convenience	-	 16%
Emergency situation/only if I really need it	4	 11%
General positive reasons (give it a try/why not)	-	 9%
I use/prefer PTCs	-	 6%
Good service	-	 6%
Quick/faster	-	 5%
Heard good things/positive referrals	-	 5%
To go to/from the airport	-	 5%

Mentions of 5% and above for 2019

REASONS FOR “**UNLIKELY**” TO USE A PRIVATE TRANSPORTATION COMPANY IN THE FUTURE

	2015	2019
No need/not interested	12	 19%
Unreliable/untrustworthy	7	 17%
PTCs are not regulated/Disapprove of business model/Unethical business practice	-	 14%
I have a car/prefer to drive myself	8	 13%
Would rather use taxis/Use real taxis/Prefer to support cab drivers	15	 11%
Costly/too expensive	-	 10%
Don't have a smart phone/the app	5	 8%
I use/prefer public transportation	7	 8%
Safety concerns/Could be dangerous	8	 6%

Mentions of 5% and above for 2019

Q2.10 Why would you say that you would be [insert response from 2.9] to use Private Transportation Companies (such as Lyft and Uber) in the future?

Base: “Very/Somewhat likely” (2019 n=214) “Very/Somewhat unlikely” (2019 n=345)

3

DETAILED FINDINGS

Understanding Behaviour

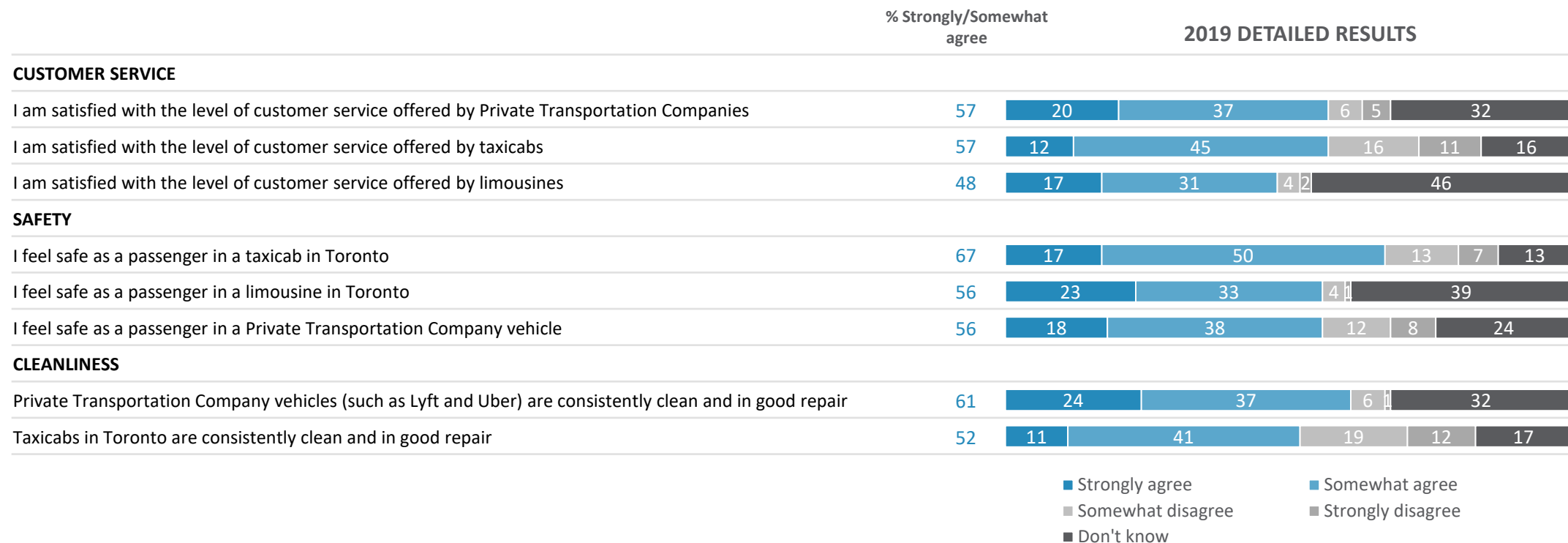
Attitudes and Behaviours

Accessible Service

CUSTOMER SERVICE, SAFETY, AND CLEANLINESS AND CONVENIENCE OF TRANSPORTATION COMPANIES

Overall, six-in-ten (57%) indicate they are satisfied with the level of customer service offered by both PTCs and taxicabs, with limousines nine points lower at 48%. However, residents tend to feel safer as a passenger in a taxicab in Toronto (67%) compared to in a limousine or PTC vehicle (both 56%).

- PTC vehicles in Toronto are thought to be more consistently clean and in good repair (61%) than taxicabs (52%), with 24% 'strongly' agreeing regarding PTC vehicles compared to 11% for taxicabs.



Q3.1 Please indicate the extent to which you agree or disagree with each of the following statements.

Base: Total Sample (2019 n=1007)

Age impacts views on taxicabs, PTCs and limousines. For all of the statements tested among residents, those aged 18-34 are significantly more satisfied with PTC customer service, safety and cleanliness than are the older age cohorts. The reverse is true for taxicabs and limousines.

	TOTAL	% Strongly/Somewhat agree			
		AGE			
		18-34	35-54	55-64	65+
CUSTOMER SERVICE					
I am satisfied with the level of customer service offered by Private Transportation Companies	57	76↑	65	43	25↓
I am satisfied with the level of customer service offered by taxicabs	57	43↓	61	58	70↑
I am satisfied with the level of customer service offered by limousines	48	38↓	52	51	54
SAFETY					
I feel safe as a passenger in a taxicab in Toronto	67	53↓	72	70	75
I feel safe as a passenger in a limousine in Toronto	56	42↓	60	60	67
I feel safe as a passenger in a Private Transportation Company vehicle	56	71↑	62	43	31↓
CLEANLINESS					
Private Transportation Company vehicles (such as Lyft and Uber) are consistently clean and in good repair	61	79↑	67	48	30↓
Taxicabs in Toronto are consistently clean and in good repair	52	43↓	55	55	56

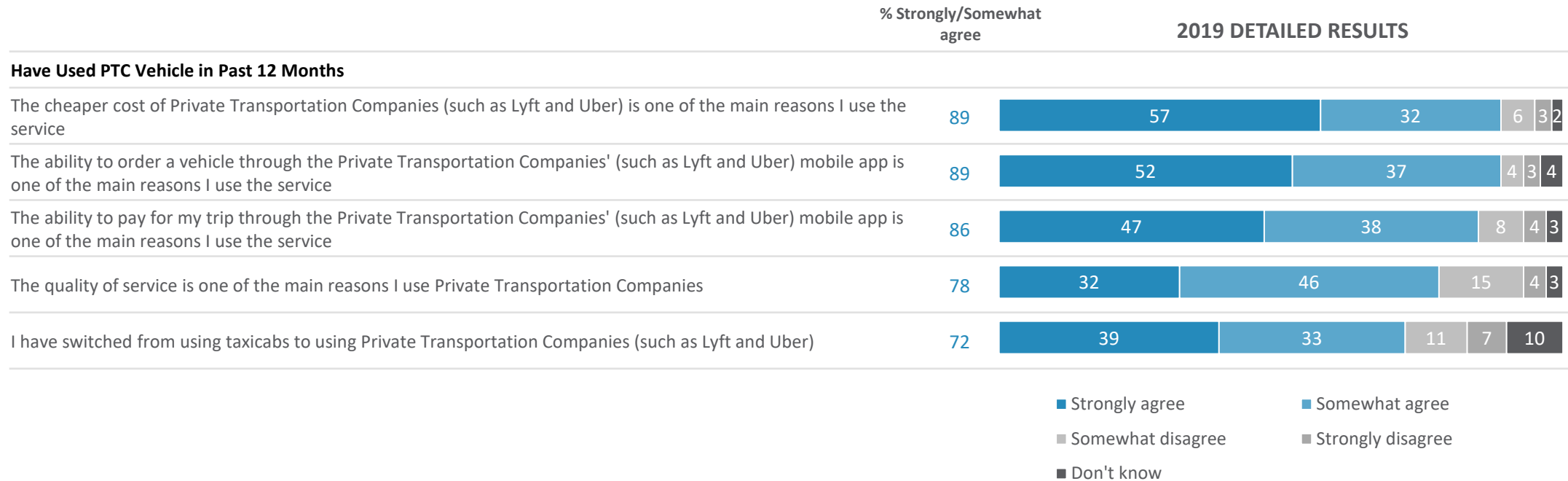
Q3.1 Please indicate the extent to which you agree or disagree with each of the following statements.

Base: Total Sample (2019 n=1007)

CUSTOMER SERVICE, SAFETY, CLEANLINESS AND CONVENIENCE OF TRANSPORTATION COMPANIES

Among those who have taken a PTC vehicle in the past 12 months, cheaper cost (89%) and convenience – ability to order (89%) and pay (86%) using a mobile app – are the main reasons they use the service. Eight-in-ten (78%) also indicate that quality of service is a main reason.

- Seven-in-ten (72%) of those residents who report using a PTC vehicle in the past 12 months also indicate they have switched from using taxicabs to PTC companies, with 39% ‘strongly’ agreeing.

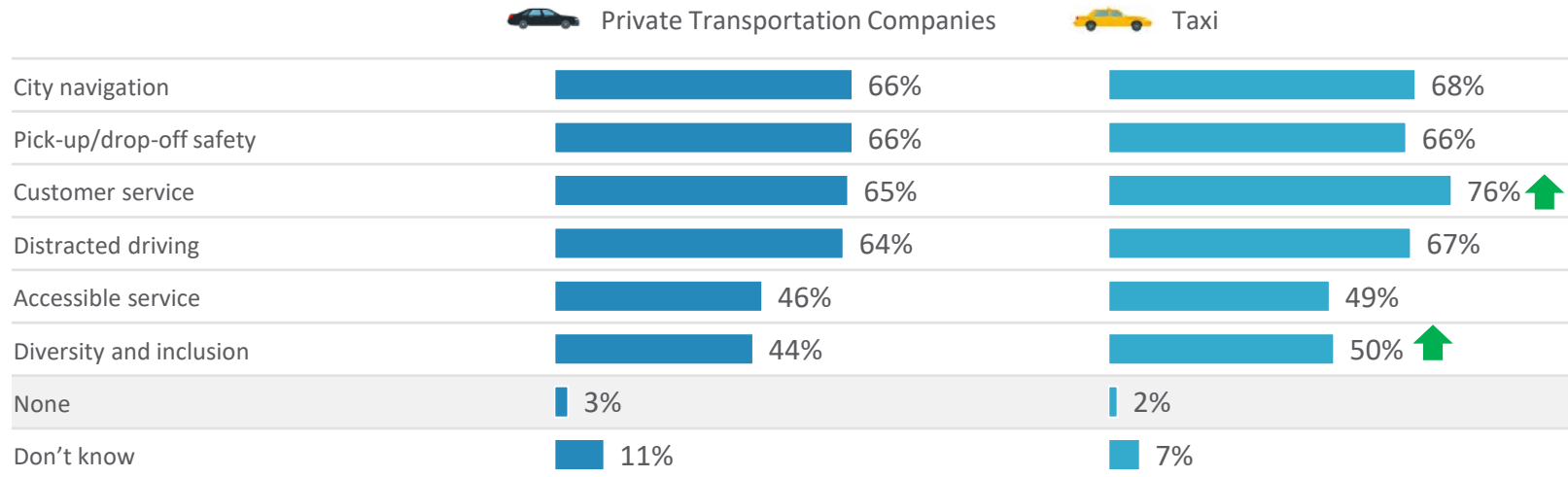


Q3.1 Please indicate the extent to which you agree or disagree with each of the following statements.
 Base: Those who have used PTC vehicles in the past 12 months (2019 n=448)

TYPES OF TRAINING DRIVERS SHOULD RECEIVE

There is overwhelming agreement that drivers for Private Transportation Companies and taxicabs should receive training. Two-thirds or more of residents believe that there should be training for city navigation, pick-up/drop-off safety, customer service, and distracted driving.

- Regarding customer service training, significantly more think that taxicab drivers (76%) should receive this training compared to PTC drivers (65%). Women are more likely than men to think that drivers for PTCs and taxicabs should receive training for all the areas tested, significantly so for city navigation, pick-up/drop off safety, and accessible service.



Q3.1a Which of the following types of training should drivers of Private Transportation Companies (such as Lyft and Uber) receive? Please select all that apply.

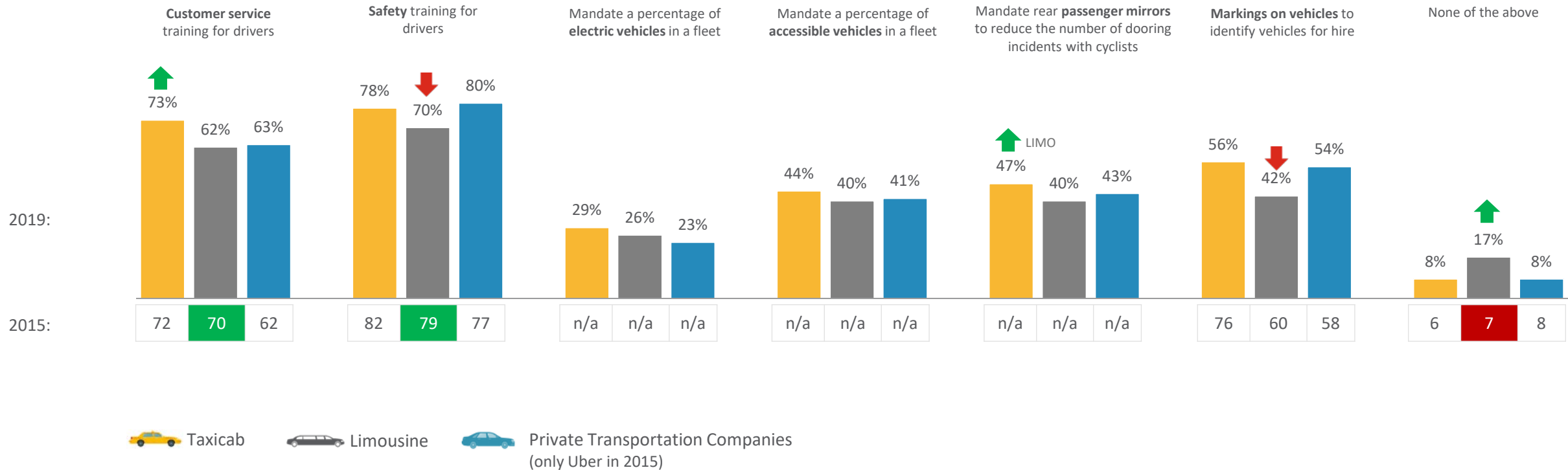
Q3.1b Which of the following types of training should taxicab drivers receive? Please select all that apply.

Base: Total Sample (2019 n=1007)

REGULATIONS THAT SHOULD APPLY TO TYPES OF TRANSPORTATION SERVICES

There is the strongest expectation for regulations for safety and customer service training. This is followed by regulations for markings to identify vehicles that are for hire.

- While eight-in-ten residents think there should be safety training for drivers of both taxicabs and PTCs, there is a significantly higher expectation that taxicab drivers take customer service training compared to PTC and limousine drivers.
- Requirements for customer service and safety training, as well as markings to identify them as vehicles-for-hire, tends to increase with age for all types of vehicles-for-hire.



Q3.2 (Q25 in 2015) Which of the following regulations should apply to the following types of transportation services? Please select all that apply.

Base: Total Sample (2015 n=1004; 2019 n=1007)

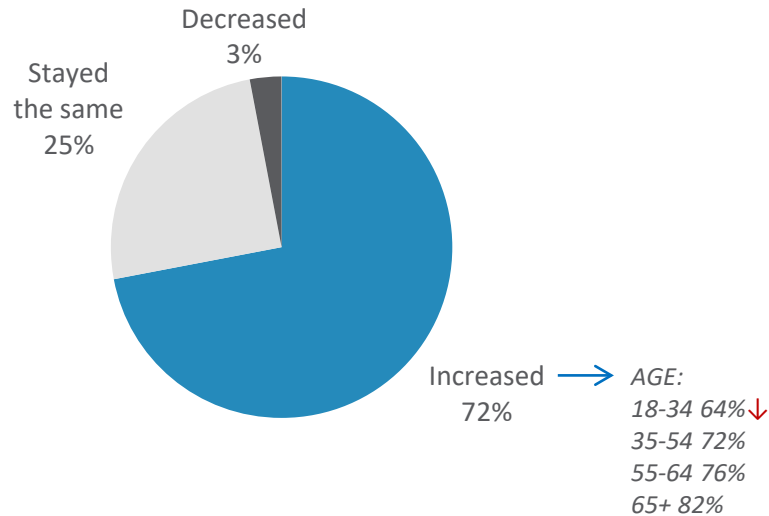
CONGESTION IN TORONTO

Seven-in-ten (72%) residents think that congestion has increased in the past three years, with a quarter finding it has stayed the same.

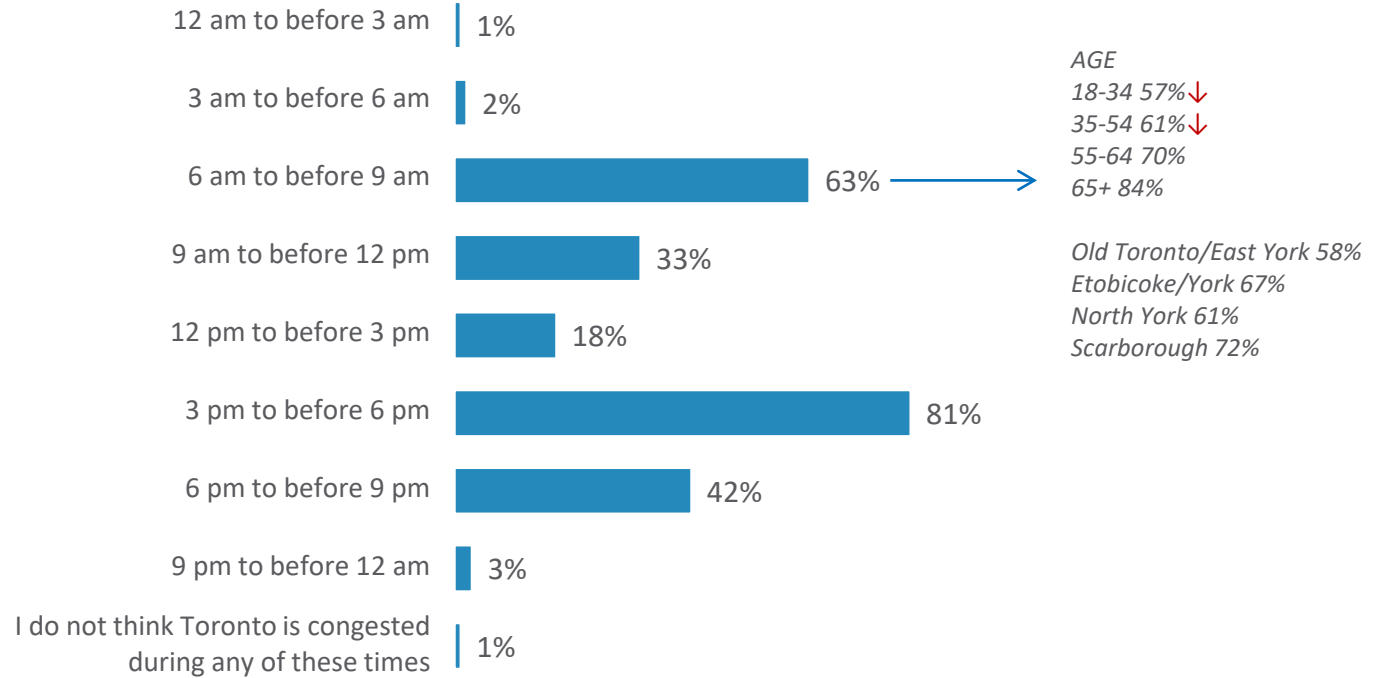
- The prime drive times of 6-9am and 3-6pm are considered the most congested.

CONGESTION IN TORONTO HAS CHANGED IN THE PAST THREE YEARS

Congestion has . . .



TIME(S) OF DAY TORONTO IS MOST CONGESTED

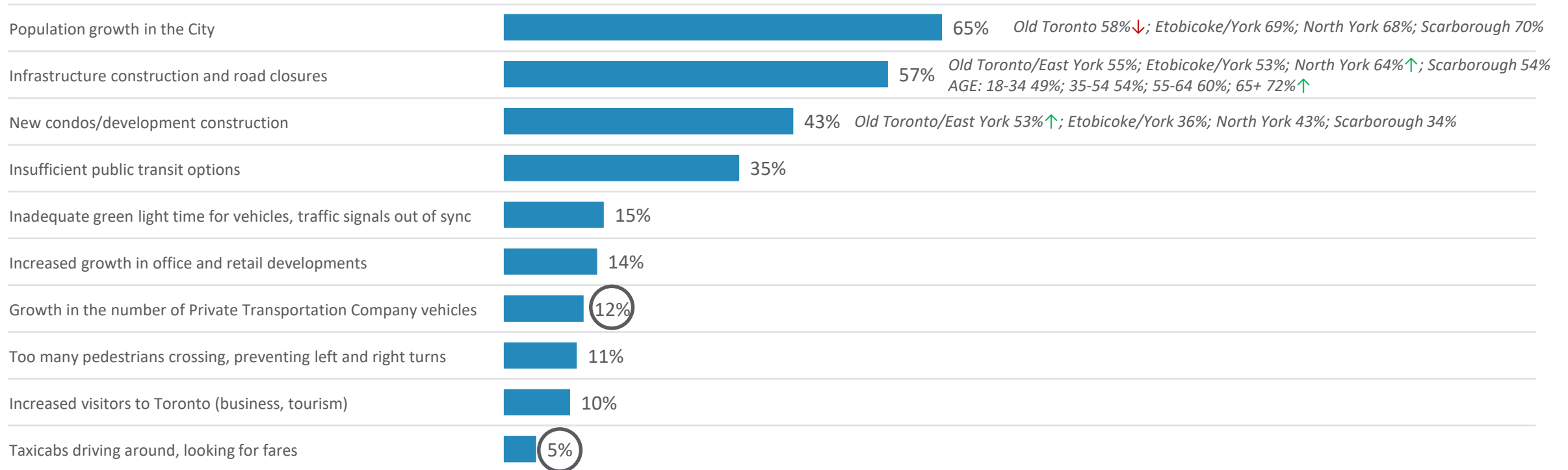


Q3.3 Do you think congestion in Toronto has changed in the past three years, and if so, how?
 Q3.4 What time(s) of day do you think Toronto is most congested? Please select all that apply.
 Base: Total Sample (2019 n=1007)

SUGGESTED REASONS FOR INCREASED CONGESTION

The top two reasons cited for contributing to increased congestion are population growth in the City (65%) and infrastructure construction and road closures (57%). A second tier of reasons were considered to be development construction (43%) and insufficient public transit options (35%).

- Reasons for this increased congestion differ by region. Residents of Old Toronto/East York are less likely than the other regions to think that population growth in the City has contributed to the increased congestion and more likely to cite condo development. And, residents of North York are more likely to cite infrastructure construction and road closures (as are those aged 65+).



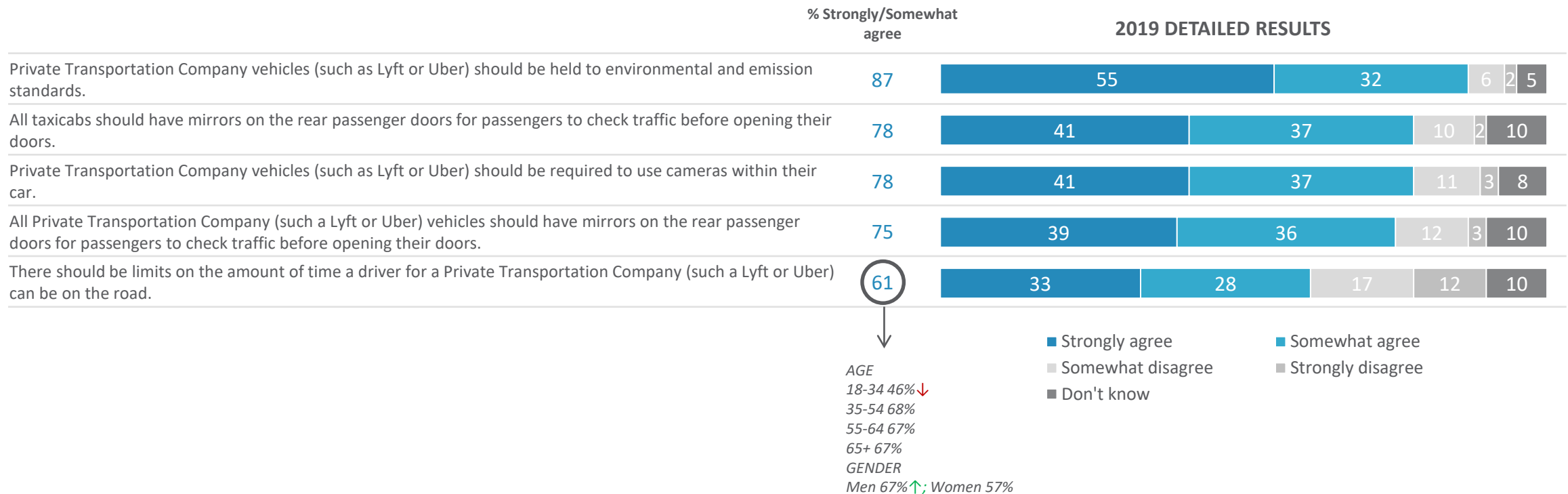
Q3.5 Which, if any, of the following reasons do you feel contribute to increased congestion the most? Please select up to three responses.

Base: Total Sample (2019 n=1007)

AGREEMENT WITH STANDARDS AND REQUIREMENTS

Residents tend to agree with all of the statements, particularly that PTC vehicles should be held to environmental and emission standards. There are similar levels of agreement for requiring taxicabs and PTC vehicles to have mirrors on rear passenger doors – as well as PTC vehicles being required to have cameras within their cars.

- Fully six-in-ten (61%) of residents also agree that PTC drivers should have limits on the amount of time they can be on the road.
- Of note, women are significantly more likely to agree that taxicabs and PTC vehicles should be required to have mirrors on rear passenger doors.



Q3.6 Please indicate the extent to which you agree or disagree with each of the following statements.

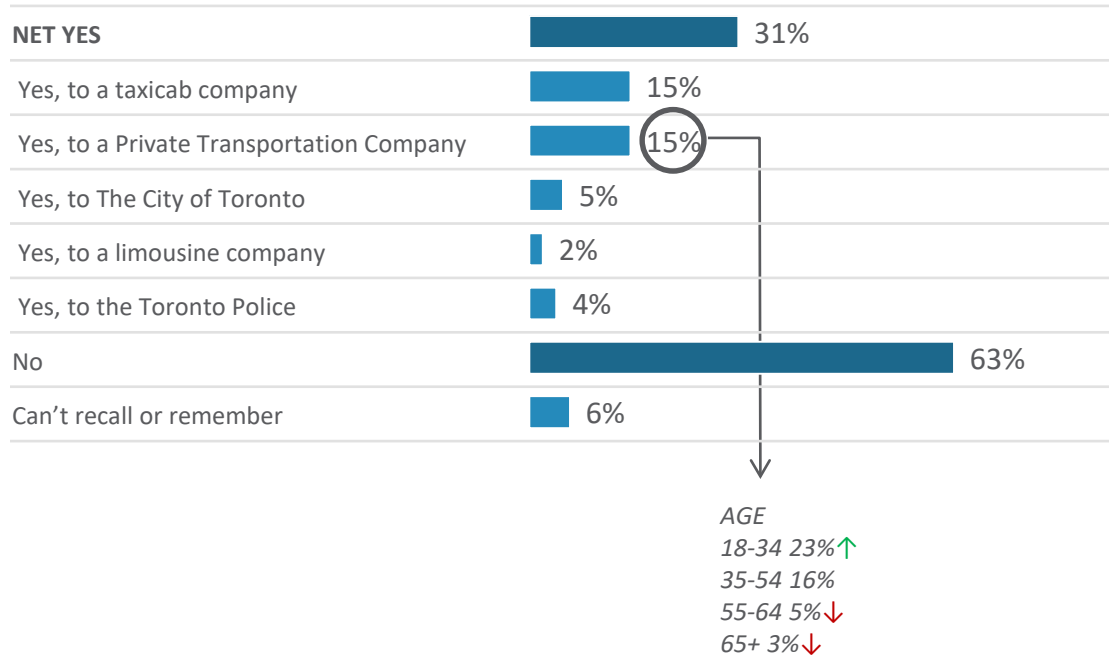
Base: Total Sample (2019 n=1007)

COMPLAINTS ABOUT TYPES OF TRANSPORTATION SERVICES

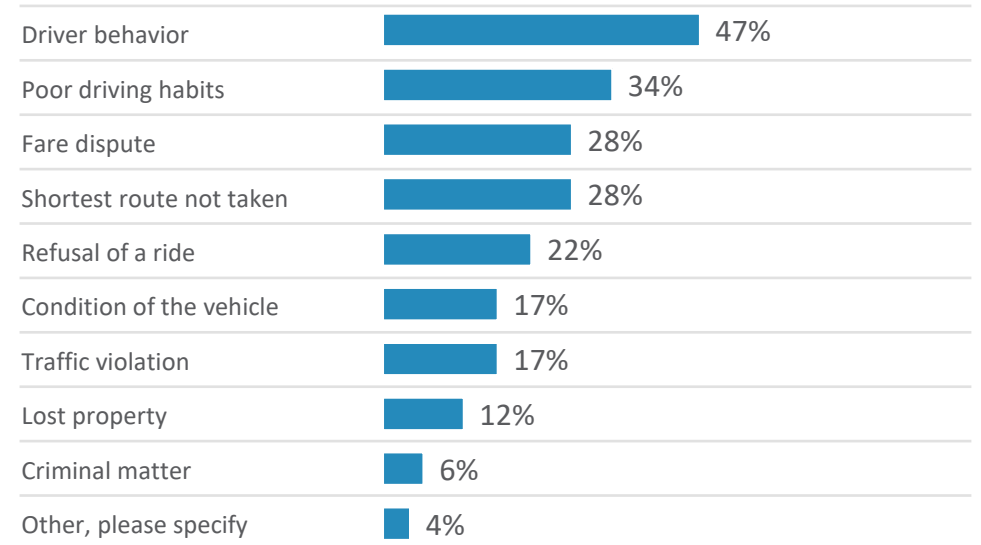
Overall, around one-third (31%) of residents report they have made a complaint, with equal numbers saying it was to a taxicab (15%) or a PTC (15%) company. Those in the younger age cohorts are more likely to have made a complaint to a PTC company.

- Around half (47%) said it was a result of driver behavior, followed by poor driving habits (34%) or the cost of the trip - a fare dispute (28%) or the shortest route was not taken (28%). Two-in-ten (22%) report it was a result of being refused a ride.

MADE COMPLAINT ABOUT TAXICAB, PRIVATE TRANSPORTATION COMPANY OR LIMOUSINE



NATURE OF COMPLAINT



Q3.7 Have you ever made a complaint about a taxicab, Private Transportation Company, or limousine? If so, please indicate to whom you made the complaint. Please select all that apply.

Base: Total Sample (2019 n=620)

Q3.8 What was the nature of the complaint? Please select all that apply.

Base: Have made a complaint (2019 n=191)

3

DETAILED FINDINGS

Understanding Behaviour

Attitudes and Behaviours

Accessible Service

ARRANGED ASSISTIVE/ACCESSIBLE OR WHEELCHAIR-ACCESSIBLE TRANSPORTATION

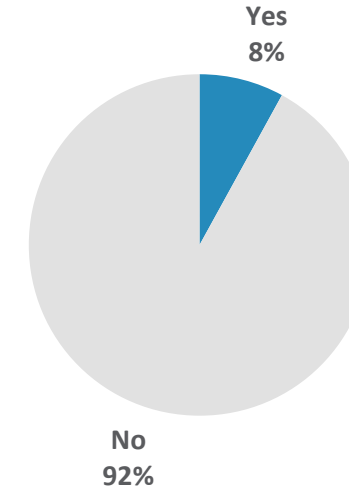
One-in-ten residents have either taken or arranged assistive/accessible transportation (10%) or wheelchair-accessible transportation (8%) in the past 12 months.

- There are no significant differences by demographics.

TAKEN/ARRANGED FOR **ASSISTIVE/ACCESSIBLE** TRANSPORTATION IN PAST 12 MONTHS



TAKEN/ARRANGED FOR **WHEELCHAIR-ACCESSIBLE** TRANSPORTATION IN PAST 12 MONTHS



Q5.1 Have you taken or arranged for assistive/accessible transportation (e.g. assistance into a sedan vehicle, or door-to-door assistance) in the past 12 months?

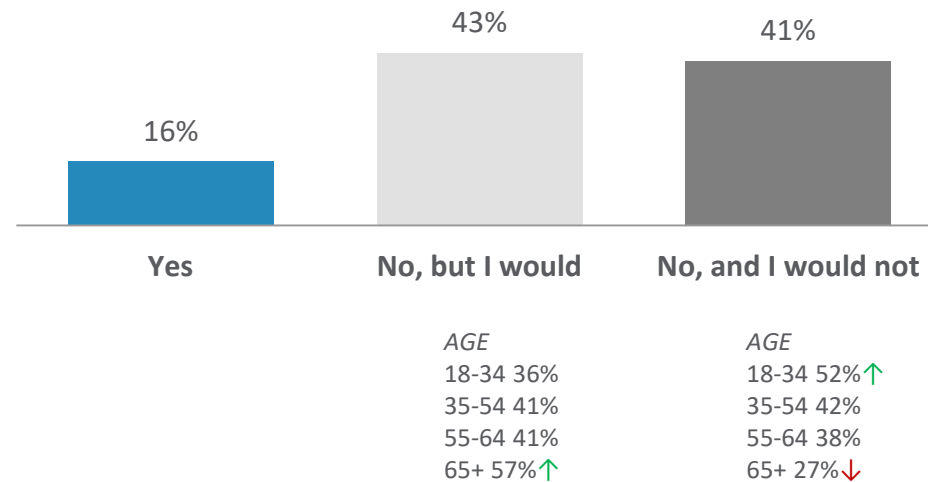
Q5.2 Have you taken or arranged for wheelchair-accessible transportation in the past 12 months?

Base: Total Sample (2019 n=1007)

HAVE USED TAXICAB THAT ACCOMMODATES PEOPLE USING WHEELCHAIRS OR SCOOTERS

A limited number (16%) report having used a taxicab that accommodates people using wheelchairs or scooters. Of those who have not, similar numbers are open to the idea (43%) or say they would not use this type of taxicab (41%).

- Willingness to use this type of taxicab is influenced by age, with those aged 18-34 significantly more likely to say they would not use wheelchair-accessible taxicabs and those aged 65+ significantly more likely to say they would.

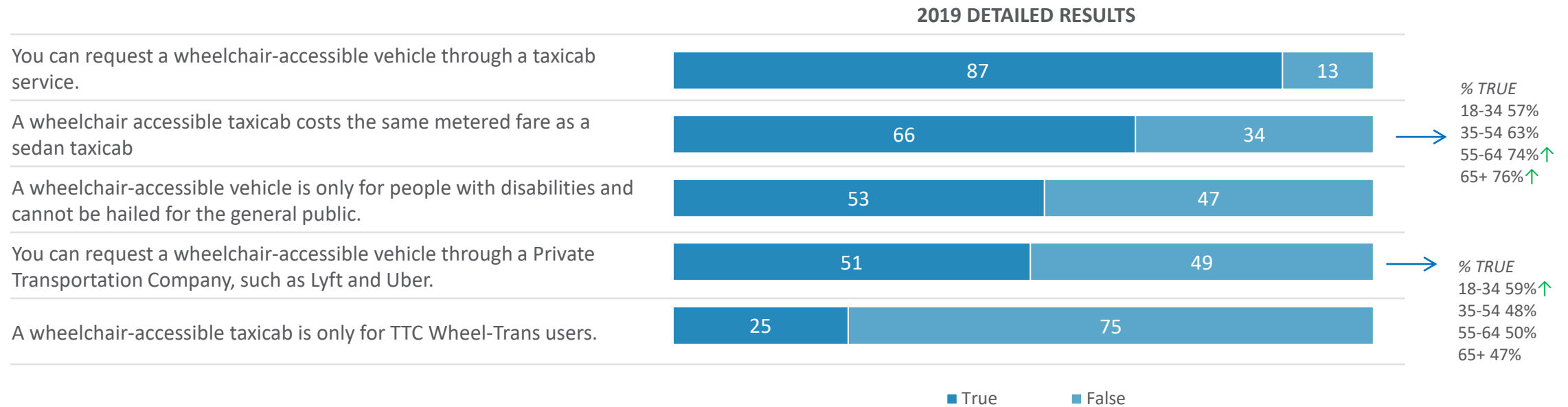


Q5.3 Considering the below information, please answer the following question. A wheelchair accessible taxicab is a van that has been modified or built with a ramp to accommodate wheelchairs and/or scooters. These taxicabs also accommodate people who do not use wheelchairs or scooters. Have you ever used this type of vehicle?

Base: Total Sample (2019 n=1007)

KNOWLEDGE REGARDING WHEELCHAIR-ACCESSIBLE VEHICLES

There seems to be a lack of knowledge when it comes to wheelchair-accessible vehicles. While three-quarters of Torontonians are aware that you can request a wheelchair-accessible vehicle through a taxicab service or that these vehicles are not only for TTC Wheel-Trans users, there is more uncertainty about the truth of the remaining statements.



Q5.4 Please identify if you believe the following statements to be true or false.

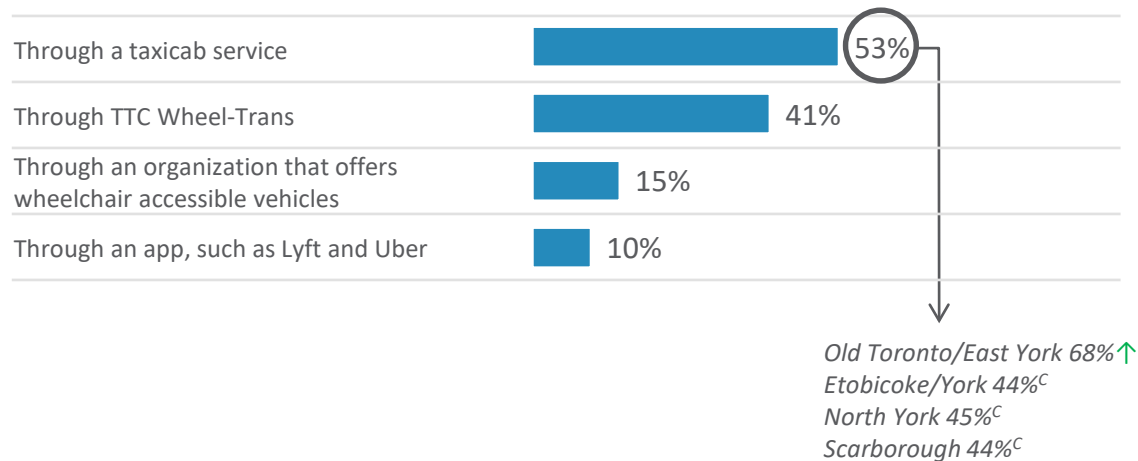
Base: Total Sample (2019 n=1007)

USE OF WHEELCHAIR-ACCESSIBLE TRANSPORTATION

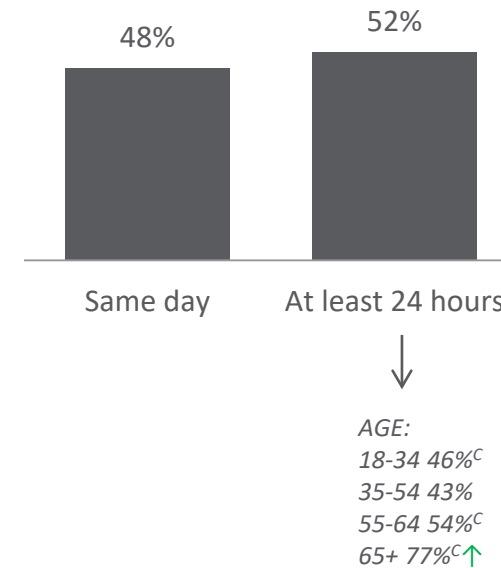
Among those who have used wheelchair-accessible transportation, most have either arranged it through a taxicab service (53%) or TTC Wheel-Trans (41%). Only one-in-ten (10%) report doing so through an app for Uber or Lyft.

- Although small base sizes, residents in Old Toronto/East York are more likely to have used a taxicab service than those living in other regions.
- Similar numbers report booking a wheelchair-accessible taxicab either the same day (48%) or at least 24 hours in advance (52%). However, older residents are more likely to request this service in advance.

ARRANGEMENT OF WHEELCHAIR-ACCESSIBLE TRANSPORTATION



HOW FAR IN ADVANCE IS REQUEST OF SERVICE FOR A WHEELCHAIR-ACCESSIBLE TAXICAB?



Q5.5 How did you arrange this wheelchair-accessible transportation?

Q5.6 Typically when you book a wheelchair accessible taxicab, how far in advance do you request the service?

Base: Have used wheelchair accessible transportation (2019 n=163)

C: Caution, small base size

EXPERIENCE OF WHEELCHAIR-ACCESSIBLE TRIP

Among those who have taken a wheelchair-accessible trip, three-quarters (74%) rate it as ‘excellent/good’, with three-in-ten (28%) rating it as ‘excellent’.

- The main reasons for this rating was that there were no issues (36%), the driver was helpful (27%) or friendly (21%), and the service was on time (19%).

OVERALL RATE OF WHEELCHAIR-ACCESSIBLE TRIP EXPERIENCE

TOTAL EXCELLENT/GOOD	74%
Excellent	28%
Good	46%
Neutral	13%
Poor	4%
Does not apply	9%

REASONS WHY WHEELCHAIR-ACCESSIBLE EXPERIENCE WAS “EXCELLENT/GOOD”

It was fine/No problems/Did not have any issues	36%
Driver was helpful/knowledgeable/provided assistance	27%
Driver was friendly/nice/polite	21%
Timely/Prompt service/On time	19%
As good as a regular service/Same as a regular taxi	9%
Safe driver/Safe trip/Was careful of passengers’ safety	7%
Clean	5%
Easy/Ease of use	3%
Other	7%
DK/NA/REF	2%

Q5.7 Thinking about the wheelchair-accessible trip(s) that you have taken, how would you rate the overall experience?

Base: Have used wheelchair accessible transportation (2019 n=163)

Q5.8 Why did you state that your experience was [insert response from 5.7]?

Base: Experience was “Excellent/Good” (2019 n=121)

4

ABOUT THE RESPONDENTS

2019 DEMOGRAPHICS

GENDER



	2015	2019
	%	%
Male	47	46
Female	53	53
Transgender	n/a	<1
Different gender identity	n/a	<1

AGE



	2015	2019
	%	%
18 - 24	11	30
25 - 34	19	
35 - 44	18	36
45 - 54	19	
55 - 64	14	15
65+	18	19

DISTRICT



	2015	2019
	%	%
Old Toronto/East York	-	36
Etobicoke/York	-	20
North York	-	22
Scarborough	-	22

EDUCATION



	2015	2019
	%	%
Grade school or some high school	2	6
Complete high school	13	29
Some technical/trade school/community college	n/a	8
Complete technical or trade school/Community college	15	10
Some community college or university, but did not finish	15	10
Complete university degree, such as a Bachelor's	41	26
Post-graduate degree, such as a Master's or Ph.D.	14	11

HOUSEHOLD INCOME



	2015	2019
	%	%
Under \$20,000	8	11
\$20,000 to under \$40,000	13	18
\$40,000 to under \$60,000	19	19
\$60,000 to under \$80,000	18	14
\$80,000 to under \$100,000	15	13
\$100,000 to under \$120,000	11	9
\$120,000 to under \$140,000	5	6
\$140,000 or more	11	11

EMPLOYMENT



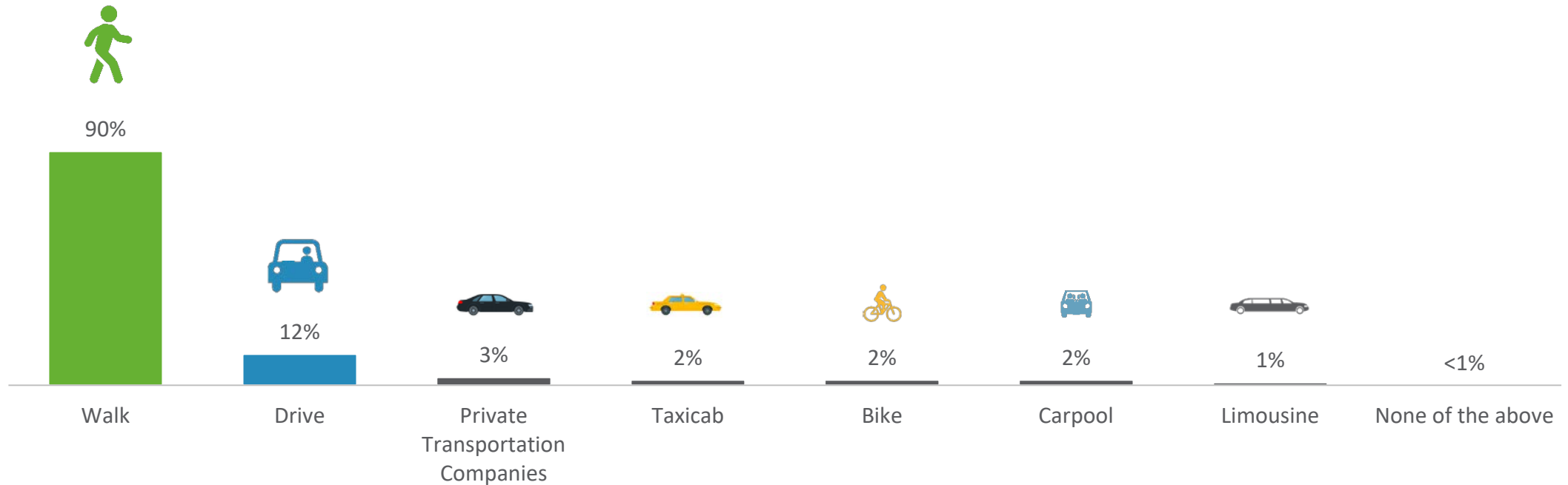
	2015	2019
	%	%
Working full-time	45	43
Working part-time	8	11
Self-employed	9	6
Currently unemployed	5	5
Student	8	9
Retired	20	20
Homemaker	4	3
Other	1	2
Prefer not to answer	n/a	<1

5

APPENDIX

The vast majority of those who use public transit walk to their stop.

- One-in-ten report driving to a public transit stop or station.
- Very few take vehicle-for-hire services to get to public transit.

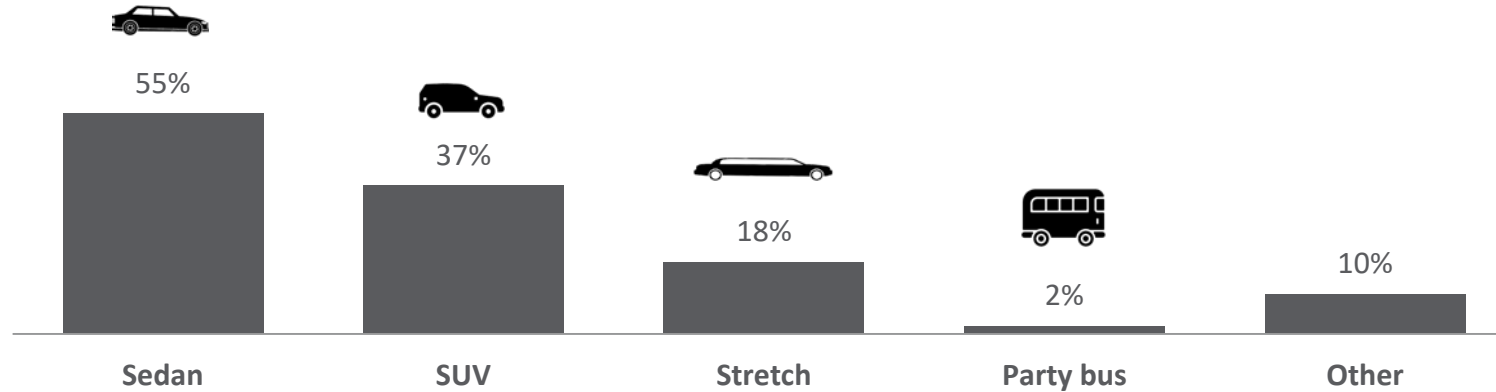


Q2.11 For trips that involve public transit, how do you typically get to and/or from the bus stop or station? Please select all that apply
Base: Use Public Transit (2019 n=849)

TYPE OF LIMOUSINE TAKEN IN PAST 12 MONTHS

Among those who have taken a limousine in the last year, most have either taken a sedan or an SUV.

- Another two-in-ten have taken a stretch limousine.



Q4.1 You stated that you have taken a limousine in the past 12 months. What type of limousine did you take?

Base: Have taken a limousine (2019 n=51)

Note To Reader: Statistical Significance Testing

- Respondents to a survey questionnaire are a sample of the total population that are eligible to take part in a survey. In consequence, all results are subject to sampling tolerances, which means that not all differences between results are statistically significant with 95% confidence.
- In order to see whether an increase or decrease in comparable figures is actually significant, we apply significance tests to allow us to determine whether or not a finding is a result of a genuine difference between two (or more) items, or whether it is just due to chance.
- Increases or decreases in the commentary throughout the report is identified as “statistically significant”.

↑ Means significantly **higher** at 95% CL

↓ Means significantly **lower** at 95% CL



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A REPORT TO
THE CITY OF TORONTO

Qualitative Focus Group Findings (Phase 2)

Vehicle-for-Hire Bylaw Review City of Toronto Resident Survey

June 2019

TABLE OF CONTENTS

1. About the Research	46
2. KEY FINDINGS	
a. Key Findings for General Public Participants	48
b. Key Findings for Users of Accessible Service	53
c. Key Findings for Providers of Accessible Service	56
3. DETAILED FINDINGS	
a. Detailed Findings for General Public Participants	58
b. Detailed Findings for Users of Accessible Service	74
c. Detailed Findings for Providers of Accessible Service	83

1

ABOUT THE RESEARCH

BACKGROUND & OBJECTIVES

The City of Toronto Municipal Licensing and Standards Division provides bylaw administration and enforcement services for Toronto, including the licencing and enforcement of vehicles-for-hire such as taxicabs, limousines and Private Transportation Companies (PTCs), such as Uber and Lyft.

The City last conducted research of its vehicle-for-hire industry in 2015. In May 2016, Toronto City Council adopted a series of recommendations to establish new regulations for this industry to ensure public safety, consumer protection, and equitable access to accessible vehicles.

The City of Toronto released a work plan for a bylaw review in June 2018. As part of this review, public opinion research was required to better understand residents' attitudes, experience and satisfaction with the vehicle-for-hire industry, as it relates to regulations, since the implementation of the bylaw in 2016.

This research was undertaken in two phases:
Phase 1 – a quantitative online survey; and
Phase 2 – qualitative focus groups.

This report represents the findings from the qualitative focus groups.

METHODOLOGY



Phase 2 of the research involved six focus groups with residents who live within the boundaries of the City of Toronto: three groups among the general public who do not regularly use accessible vehicle-for-hire service, two groups among the general public who use accessible service, and one group among providers of accessible service.



Focus groups were conducted on March 25th and March 27th, 2019.



In all, 41 Toronto residents participated in the focus groups: 24 among the general public who do not regularly use accessible service in three focus groups (referred to in this report as general public participants); 12 among the general public who use accessible service in two focus groups; and 5 providers of accessible service in one focus group.

2a

KEY FINDINGS FOR GENERAL PUBLIC PARTICIPANTS

Key Findings for General Public Participants

1 **When asked to identify top transportation issues facing the City, some of the general public participants cited, on an unaided basis, PTC and accessibility as the top transportation issues.**

Other issues mentioned were: too much construction, traffic, gridlock, overcrowded public transit, cycling challenges, and inadequate infrastructure.

2 **Many participants acknowledged that their use of PTCs has increased in recent years.**

Participants cited the following reasons for their increased use: convenience, easy to access, easier to expense, easy to use app, cheaper to use, faster, tracking, easily accessible seatbelts, cost predictability, friendlier service, and better accountability (e.g. driver ratings via app). These reasons tended to influence general public participants' use of PTCs over taxi services.

Some challenges to using PTCs that were cited were: need for a credit card, need for smartphone with data plan, difficulty in identifying PTC vehicles, no PTC stands, taxis more widely available in the downtown, the perception that it is easy to become a PTC driver, possible insurance/maintenance issues with PTC vehicles, and lack of knowledge of the city.

Key Findings for General Public Participants

3 Most general public participants had limited knowledge about the level of regulation in the vehicle-for-hire industry. There were different views and perspectives about the level of regulations required with respect to the taxicab/PTC industry.

Some participants wanted more PTC regulation for reasons such as: taxis being more heavily regulated, worries about safety, more regulation of the types of people getting into the industry (i.e. worries about people with questionable backgrounds becoming drivers), and the amount of time drivers are allowed to provide vehicle-for-hire services.

Others were much less keen because they worried how increased regulation might negatively affect pricing and service levels.

There was also the belief expressed by several participants that there should be equity with regard to the level of regulation of the taxicab/PTC industry.

4 Some general public participants felt regulation should include: training, insurance compliance, background checks, driver certification, and amount of time on the road.

Participants identified a number of training needs – defensive driving, customer service, safe pick up and drop off protocols, city navigation, diversity and inclusion training, dealing with difficult situations, and serving customers with disabilities.

Key Findings for General Public Participants

5 Most general public participants are likely to call the vehicle-for-hire provider, not the City, to lodge a complaint.

Participants also felt that rating systems used by PTCs provided an effective 'accountability' check on bad drivers. It was thought to be fast and effective.

6 General public participants had very little knowledge of accessible vehicle-for-hire services.

Generally, these general public participants were unaware about accessible vehicle-for-hire service. For example, most of these participants did not know that wheelchair accessible vehicles are larger, they thought they had to be booked a few days in advance, that these vehicles are equipped with a ramp, and they did not know that anyone is able to use an accessible vehicle-for-hire service.

Key Findings for General Public Participants

There were few, among the general public participants, who had used an accessible vehicle-for-hire. Among those that had, most reported a positive experience.

However, many general public participants were clearly reluctant to use accessible vehicle-for-hire services because they worried whether they would be taking a vehicle away from someone who specifically requires this type of service.

Moreover, participants were unsure whether these accessible vehicles are available for everyone to use.

Some benefits were identified with using these vehicles; such as being easier to get in and out of, and able to accommodate larger groups such as families.

2b

KEY FINDINGS FOR USERS OF ACCESSIBLE SERVICE

Key Findings for Users of Accessible Service

1 Participants using accessible service preferred Wheel-Trans as their mode of transportation – its appeal is the significantly lower price.

Participants tended to use taxicabs and PTCs less frequently because they were viewed as much more expensive. Some acknowledged that they use these methods when they absolutely need to be at a destination at a specific time.

2 Users of accessible service identified a number of positives with taxicab services: taxicab service is improving, accessible taxicabs are more available, and drivers are more knowledgeable and service-centric.

However, these participants also noted negative experiences – some drivers have a poor attitude, some try to overcharge, and some are not properly trained to assist those customers using accessible services.

Key Findings for Users of Accessible Service

3 Many of the participants using accessible service also identified the same PTC benefits cited by the general public participants – speed, cheaper, ease of booking, increased security, and friendly drivers.

However, they also had negative experiences – lack of availability of the service (particularly in non-prime times), training, overcharging, lack of standards, not able to provide proper feedback regarding service levels, not getting a side-entry accessible vehicle, poor drop-off/pick up protocols, and driver not understanding the situations faced by people using accessible service.

4 Participants using accessible service identified a variety of training needs for vehicle-for-hire drivers.

These included sensitivity training, customer service, service protocols, communication skills, safety of the wheelchair, and listening skills. There was also a belief that regular audits needed to be done.

2c

KEY FINDINGS FOR ACCESSIBLE SERVICES PROVIDERS

Key Findings for Accessible Services Providers

1 Virtually all participants who were providers of accessible vehicle-for-hire service asserted that there isn't sufficient demand.

Providers of accessible service claimed that customers who need accessible vehicles are choosing to use Wheel-Trans given its lower price. In some cases, people do not know that taxi brokerages and PTCs offer accessible vehicles.

2 Providers also felt that there is a lack of knowledge and familiarity that accessible vehicles are available for everyone to use.

Providers of accessible service believe that customers tend not to like wheelchair accessible vehicles because they are not comfortable and hard to get into. They also said that there are some stigma issues in using this type of vehicle. The stigma concern was about using an accessible vehicle when it is not physically needed and being seen as taking it from someone who requires it. They also felt that customers do not know accessible vehicles can be used by anyone. These perspectives were also raised by the general public participants.

3a

DETAILED FINDINGS FOR GENERAL PUBLIC PARTICIPANTS

A few general public participants identified taxicab/ride share and accessibility as transportation issues facing the City of Toronto.

What are the transportation issues facing the City of Toronto?



Too much construction

"It would be a nice city, when they are finished building it."



"Traffic" and "Gridlock"



Lacking public transit



Overcrowded public Transit

"The volumes are getting too much and the stations are too small."

"The streetcars are getting longer and the design of the stations are too small. It's causing more congestion."



The City's infrastructure has not kept pace with the number of people living in the City



Cycling in the City is challenging

"There are not enough routes and space for bicycles."



Conflict between the taxicab drivers and ride shares

"I think the cabbies are pretty angry and upset about the ride shares....the cabbies are being undercut and they pay a lot more for licensing."



Accessibility

"Accessibility for some folks with greater needs is hard because I've heard that Wheel-Trans will sometimes show up and leave before people get there....you have to book two days before and when they come, they come late or they come early."

General public participants acknowledged that their use of PTCs has increased in recent years.

They acknowledge this change in their PTC usage is due to a variety of reasons – PTCs offer an easy and convenient service at a low cost.

Convenience

Ability to access rides via smartphone

“You basically put your destination into your phone and it lets you know the following – here’s your driver and car. You don’t have to phone for a cab or flag down a cab. In the old days, you would call, and you would have to wait for maybe 30 to 45 minutes before a cab would show up at the door.” “It is much easier to book through a smartphone.”

Easier to submit a business expense

“It is a lot easier to log onto Uber and get these expenses versus getting a receipt which, sometimes, you would lose.”

Convenient while travelling on business

“It is almost like having a personal chauffeur and car available when you are traveling.”

Easy to use app

“The app really makes the service easy to use.”

Ease of payment

“You don’t have to take cash out of your pocket. It goes right on your credit card.” “You don’t have to carry cash around with you.” “You’re not stopping in traffic trying to get your money out to pay the driver.”

Fast service

“The service is so quick and fast.” “They come to my door much faster than taxis.”



The 2019 survey of Toronto residents indicated that residents are moving from the use of taxicabs and limousines toward PTCs.

Among those using PTCs in the past 12 months, 7-in-10 indicate that they have shifted from taxicabs to PTCs. The main reasons cited for this shift were: convenience, cost, and quality of service.

General public participants acknowledged that their use of PTCs has increased in recent years. (cont'd)

Lower Cost

Lower Cost

"It is 100% cheaper." "Yes, it is a good deal." "Going to the airport is half the price". "For short drives, they are almost cheaper than the TTC." "When you consider the costs of running a car in this City, it is cheaper to use Uber." "Even with surge pricing, the service is cheaper than taxis."

Discounted Rates

"They also provide discounts throughout the month." "I use it a lot more because they have these promos, so they give you discounts on rides to entice you to use the service."

Cost Predictability

"You know what you're paying for versus having a surprise." "You know what the price is going to be regardless of the traffic."

Safety

Tracking

"When I am in Uber, I feel like they're tracking whereas, in a cab, no one really knows where I'm located."

Safety

"In cabs, I can never find the seatbelt while, in Uber, the seatbelts are always there ready to be used."

Customer Service

PTC vehicles are clean

"It is usually a nice and clean vehicle."

Friendly service

"Uber drivers are friendlier, more patient, and drive better." "They seem happier."

Accountability

"I can rate my ride and make a comment....there is accountability." "If you have an issue with a driver, they are able to find that person and hold them accountable to whatever problem they had."

General public participants identified the following as PTC disadvantages: ability to access, lack of barrier to entry for drivers, and lack of City knowledge.

Accessing PTC service

Credit card is needed

“One can’t use the service if you don’t have a credit card, while this is not true for taxis.”

PTC vehicles are not always available

“I was trying to get home at two in the morning from the airport and I couldn’t find any Uber cars at that hour of the day.”

Smartphone with a data plan is required

“If you don’t have a smartphone, you can’t use Uber.” “You also need a data plan with your phone.”

PTC vehicles are not easily identified, while taxicabs are easy to spot

“Taxis are much more easily spotted than Uber vehicles.”

Some are not confident or able to use technology

“My mother can’t put the app on her phone....she is too old.”

Taxicabs can be easily found in the downtown core

“It is very easy to flag down a taxi in the downtown area.”

There are no PTC areas like taxi stands

“If you happen to be at a building or airport, there’s typically a taxi stand.”

General public participants identified the following as PTC disadvantages: ability to access, lack of barrier to entry for drivers, and lack of City knowledge. (Cont'd)

Ability to Negotiate

Able to negotiate price with taxicabs

“With taxis, you can negotiate the price. You can’t with Uber.”

Safety

Anybody can be PTC drivers

“Anybody with a licence, car insurance, and no criminal record can be an Uber driver.” “Uber drivers could just be anybody. There is not really a formal screening about who they are.”

Insurance and maintenance concerns with PTC vehicles

“I guess the risk as an Uber client is how do you know the driver has kept up on the vehicle maintenance and insurance.”

Getting into the wrong PTC vehicle

“I heard some drivers take the wrong person to the other side of the city before realizing that this was a mistake and it was the wrong destination.”

General public participants identified the following as PTC disadvantages: ability to access, lack of barrier to entry for drivers, and lack of City knowledge. (cont'd)

Knowledge

PTC drivers don't know the city

"A lot of times they don't know streets, directions."

Privacy

Privacy/personal information issues with PTCs

"They have all your personal information....with a taxi, you are in and then you are out. They don't have a lot of your personal information."

Some participants felt that PTCs should be regulated **more**, while others were concerned about the consequences of increased regulation of PTCs. There was also a belief expressed by several participants that there should be equal rules.



Most participants were not knowledgeable about how the vehicle-for-hire industry is regulated, although most felt that taxicabs/limousines were regulated more than PTCs.

There were a number of participants who argued that PTCs should be regulated more.

- Some argued that taxicabs are regulated more and thus they are operating at a disadvantage to PTCs.
- Some participants said that, given that PTCs are transporting people, they need to be regulated due to concerns about safety.
- There was misunderstanding as to whether or not PTC drivers were required to have a criminal background check.
- Some believed that the amount of time a driver is allowed to be on the road needs to be regulated.

Some participants felt that PTCs should be regulated **more**, while others were concerned about the consequences of increased regulation of PTCs. There was also a belief expressed by several participants that there should be **equal rules**. *(cont'd)*

Others did not want more regulation of PTCs, citing the following:

- There were worries that increased regulation would lead to increased costs:
“So, for me, I’ve never had a bad experience with them at all. I understand if they’re regulated more, it will cost them more to operate and then the costs will then be dumped onto me....I just want the lowest cost possible.”
- Some felt PTC drivers are better than taxicab drivers, so they were less inclined to advocate for more regulation: *“My impression is that Uber drivers are more cautious when driving because they are using their own cars for this service.”*
- A few felt that taxicab prices should be regulated to be on par with PTCs.
- Some argued that the PTC ‘rating’ system helps to *“weed out the bad drivers”* and, as a consequence, additional regulation is not needed.

A number of general public participants felt that vehicle-for-hire regulation needs to focus on mitigating risks.

“Regulation needs to be developed to be preventive.”
“Each profession has a lot of rules. You can’t go practice anywhere and do anything.”

Participants identified how the vehicle-for-hire industry should be regulated:

- Training and coursework prior to providing vehicle-for-hire services.
- Ensuring that all vehicles are insured properly.
- Background checks.
- Driver certification – *“So, doctors, dentists, and lawyers have to maintain their certification, why shouldn’t drivers?”*
- Drivers’ re-evaluation related to driver skills, road knowledge, ability to drive with multiple people in the vehicle.
- Amount of time drivers can be on the road providing vehicle-for-hire services.

Most participants felt all vehicle-for-hire drivers need training.

“Most jobs these days need people to know the rules and guidelines of their business.”

Participants identified a number of needs for training for vehicle-for-hire drivers:

- Defensive driving– in order to reduce the risk of accidents: *“They need to be trained to deal with distractions.”*
- Customer service: basic customer management techniques (i.e. greeting customers properly, being helpful, accommodating, being respectful).
- Safe pick-up and drop-off protocols: this was viewed as important given the safety issues with picking up and dropping off customers.
- City navigation (particularly when the GPS is not working): major routes, shortcuts, major sites.
- Diversity and inclusion training: this was viewed as a prerequisite for potential drivers of any vehicle-for-hire.
- Dealing with difficult situations.

Some people did not like this discussion regarding increased PTC training and regulation because they feared the consequences – increased pricing: *“I think if we start to implement all these regulations, it might rack up the price...we are better to take the chance with what we have now.”*

General public participants are supportive of ensuring there is a sufficient number of accessible vehicles, and low-key vehicle markings, but less interested in EV regulation and side passenger mirrors.

General public participants voiced different perspectives on potential regulatory concepts for vehicle-for-hire providers:

- **Requiring vehicle-for-hire providers to maintain a certain percentage of accessible vehicles** – This was viewed as “*absolutely*” important. There were strong feelings that people with mobility issues need to have viable transportation options.
- **Requiring a certain percentage of electric vehicles (EVs) in vehicle-for-hire fleets** – Virtually all participants strongly believed that that EVs are becoming more widely available by vehicle manufacturers and that demand and usage is increasing so regulation was not required. Underlying this belief was the perception that EVs were naturally increasing in their usage.
- **Mandating rear passenger mirrors to reduce the number of dooring incidents with cyclists** - This idea generated more mixed feelings. For some, it was not immediately obvious the purpose of this regulation. Some felt that people would not use this rear passenger mirror even if it is there and, thus, this requirement was unnecessary. They felt that people should be educated to look left – they suggested that companies should put a sticker on the door saying “*Please look left*”. Still others thought that some taxicabs now have these rear passenger mirrors. Those participants who were cyclists were the most supportive of this possible regulation.
- **Markings to identify Vehicles-For-Hire** – Some noted that PTC drivers already have stickers or lights on their vehicles. A number of participants felt that markings on vehicle-for-hire cars is important for safety reasons: “*It is important for people to know what car they are getting into.*” But, many participants recognized that PTC drivers use their own personal vehicles and, thus, the identification markings should be easily removable from the vehicle. A few participants saw no reason for vehicle markings.

General public participants said they would contact the service provider, not the City, if they had a complaint about the service of a vehicle-for-hire provider.

PTCs

- Most participants noted that they have the option of providing ratings for PTCs and they receive a very quick response. They also noted that, if a customer has an issue with a specific driver, it is possible for them to exclude that driver from future business.

“With Uber app, you can send an instant message, and they respond within minutes.”

Taxicab companies

- Most participants would call the service provider if they had a service problem – they assume that if a taxi brokerage failed to provide proper service, they should call them.

“I would call the main line of the taxi company.”

Most general public participants did not have very much knowledge and familiarity with accessible vehicle-for-hire services, but virtually everyone believed this is an important offering.

- Most participants did not have a lot of knowledge and familiarity with accessible vehicle-for-hire services. Many thought the taxi companies provided these vehicles, but they were less sure about PTCs.
- Plus, a few people thought that taxi companies have some affiliation with Wheel-Trans.
- A few made these observations – it is important to note that many participants were not aware of these considerations:
 - Accessible vehicles are larger and will be equipped with a ramp.
 - The view was that it typically has to be booked a few day in advance.
 - There was a perception that the booking process is straightforward – one describes the situation and the company sends an appropriately sized vehicle.
 - Some people observed that these vehicles are not always available unless you plan ahead: *“There are not a lot of these vehicles available”* and *“They are hard to find.”*
 - There were no surcharges associated with using this type of service.
 - PTCs offer accessible vehicle-for-hire services.
 - Everyone is able to use accessible vehicle-for-hire services.

Among the few general public participants who used an accessible vehicle-for-hire vehicle, most reported having a positive experience.

- A participant noted that she used these services two to three times a week for three months – the service was reliable and the drivers were also helpful. There was enough room to accommodate four people including one with a wheelchair. She admitted that she knew nothing about the service when they first started to investigate accessible transportation options.
- Others also reported positive experiences in using accessible vehicle-for-hire vehicles even though they did not have a requirement to use one.

Many general public participants were reluctant to use the accessible vehicle-for-hire service for their personal use if they did not have a requirement.

There was considerable hesitation in using accessible vehicle-for-hire services.

- Some people felt that these accessible vehicles-for-hire were not available for use by the non-accessible users.
- It was acknowledged by participants that accessible vehicles provide a number of benefits: they offer more space, they are easier to get into, and there is more legroom. Some felt that these vehicles could be used by families because they can accommodate more people.
- Despite these benefits, there was considerable reluctance in using these types of vehicles:
 - Participants indicated that they were reluctant to use accessible vehicles because they are worried that somebody else who really needs this specific vehicle would not be able to use it: *“I wouldn’t take it if someone else needed it.” “I don’t want to be seen as an able-bodied person getting into an accessible cab.”*
 - Participants talked about the *“stigma”* associated with using accessible vehicles-for-hire: *“People don’t want to use accessible cabs if there is no need to use it.”*
 - There was a general consensus that there should be public education to address common misperceptions or lack of knowledge about the use of accessible vehicles-for-hire.

3b

DETAILED FINDINGS FOR USERS OF ACCESSIBLE SERVICE

Users of accessible service make use of a variety of different types of transportation modes, but there is a strong preference in using Wheel-Trans.



The preferred mode of transportation is Wheel-Trans.

- Users of accessible service choose Wheel-Trans as their method of commuting given its lower price. Wheel-Trans is preferred when getting to the destination is less urgent – choosing Wheel-Trans versus a taxicab or PTC depends on *“the importance of where we are going.”*
- Most expressed frustration with the service – the time to book the service (e.g. sometimes 4 to 5 days in advance), the length of the journey, accessing the service certain times of the year (e.g., the holiday season).



TTC subway is also popular.

- This was frequently used by participants – its appeal was the price.



Taxicabs and PTCs are used, but less frequently.

- Most participants acknowledged that they used taxicabs and PTCs less frequently due to the higher price associated with these ways of commuting. However, some will use taxicabs and PTCs when getting to the destination on time is a more important consideration:

“I will use an Uber or taxi when getting there in timely fashion is important.”

“I do use Uber on occasion when I can afford it and when I can’t get Wheel-Trans.”

“I have moved to Uber because cabs are too expensive.”

“Wheels-Trans is heavily subsidized, whereas Uber is not – that’s the fundamental difference.”

- It was generally believed that PTCs and taxicabs were harder to access in the suburbs compared to downtown.

Participants identified a variety of advantages with taxicab services.



Positive Experiences with Taxicab Services

Taxicab service is improving

“I have actually found that they have upped their game....drivers are taking more time, being more helpful.” “Before Uber, taxi drivers were idiots.” “Vehicle maintenance is better.” “Drivers are better.” “More responsive.” “Competition from Uber has improved taxi service.”

Accessible taxicabs are more available, but not necessarily at all times

“I find accessible taxis are more available, but 5 to 10 years ago, you had to book them three days in advance...things are much better today.” “They are harder to access early in the morning or late at night.”

Wheelchair accessible taxicabs are more standardized compared to PTCs

“A lot of taxis tend to be a standard size and, as a tall person with some mobility issues, I find taxis more comfortable to get into.” “It is easier for my guide dog to sit on the floor of a taxicab where they are supposed to be in a car for safety reasons.”

Taxicab drivers are often considerate and helpful

“Some get out of their cars and ask you whether you need help.”

However, user of accessible service also associated some negatives with taxicab services.



Negative Experiences with Taxicab Services

Attitude	<p><i>“One of the main issues is the attitudes of the drivers.”</i></p> <p><i>“Some drivers are really rude, express no understanding, and offer very little help to people.”</i></p> <p><i>“Some drivers used profanity when I asked for their name.”</i></p> <p><i>“I complained to the taxi company [about the driver] and then an investigation was conducted, but they came back and said nothing happened. They said it was a “she said/he said” situation. But, these taxi companies have a conflict of interest – they won’t admit that their drivers did something wrong.”</i></p>
Cost	<p><i>“I don’t use taxis because they are too expensive....but when I first looked into it, it’s like there’s an automatic \$10 on top on the regular cost.” “Sometimes, they try to charge extra for the guide dogs.”</i></p>
Fare refusals when accompanied by a guide dog	<p><i>“Having a guide dog is not easy mainly with taxis and Uber, but sometimes with Wheel-Trans. There are a lot of issues. You can’t bring your dog into our cab even though my service profile clearly says I have a service dog. Some drivers are scared of dogs. Some drivers don’t know the proper etiquette with respect to guide dogs. They will do things that create problems for the me and my dog. One driver took off and we could not follow him. He should have led us to the cab. Some drivers will try to grab the leash.”</i></p>
Improperly securing mobility devices	<p><i>“When you use a cab or Uber, its normally they do what they can get away with. At Wheel-Trans, it is safety first.”</i></p>
Unscrupulous behaviour	<p><i>“The taxi driver took me around, around, around and before you know it, the taxi fare is \$40. He knew I was a new immigrant and was visually impaired.”</i></p>

Not surprisingly, many of the benefits associated with PTCs identified by the general public participants were also cited by users of accessible service.



Positive Experiences with PTC Services

Participants acknowledge that PTCs have a lot of vehicles (but not necessarily ones that assist those people in wheelchairs)

"I like the convenience of UberWAV because they can come when I need them, but there's only a few of them. I have gotten to know a few drivers and I just text them. At 6:40am in the morning, there are not many UberWAV vehicles out there, so I need to pre-schedule them."

Cost

"It is much cheaper to use Uber."

Payment via credit card

"I don't like strangers to go through my wallet."

Increased security and safety

"There is more security when using Uber."

Friendly drivers

"Most of the drivers are really nice."

The app is easy to use

"It also gives a sense of independence. I don't have to pre-book."

However, users of accessible service cited negative experiences that are specific to accessibility issues.



Negative Experiences with PTC Services

Limited and inconsistent availability	<i>“Lack of availability”, “There are not lot of UberWAV vehicles.” “These UberWAV are not exclusive to serving people in wheelchairs – they are sometimes too busy to transport us.”</i>
Lack of availability during non-prime times	<i>“There is an issue about the availability of accessible vehicles early in the morning or late at night.”</i>
Overcharging	<i>“They will charge \$5 if I’m not there, but I was there. I’m standing at a certain spot, but they are somewhere else.”</i>
Lack of training (or empathy or sensitivity)	<i>“They don’t understand that it is challenging for people who are visually impaired.”</i>
Lack of trust	<i>“While I would be prepared to send my son on Wheel-Trans by himself, I would not do this with Uber – I just don’t trust them.”</i>
Poor drop off spots	<i>“Sometimes, they drop me all the way around on the other street behind the building....they drive around in circles and are really confused or they try to drop me in the plaza across the street.”</i>

However, users of accessible service cited negative experiences that are specific to accessibility issues. *(cont'd)*



Negative Experiences with PTC Services

Fare refusals

“Sometimes, they’ll pass on your call because it is not worth the effort.”

Side loader issue/Conversion type

“My big concern in using Uber is getting a side loader. I prefer a rear-entry vehicle.”

Limited customer service standards

“It’s like suppose something does go wrong or suppose I actually have a complaint. What are their standards? I get the sense that Uber is a service that’s strictly interested in making money, whereas TTC is an organization that has standards that they have to uphold.”

Lack of established complaint process

The app isn’t built to easily report issues related to drivers dealing with wheelchairs.

Users of accessible service identified a variety of training needs, particularly around assisting people using accessible services.

Participants identified a variety of training needs for taxicabs/PTCs – some of this training was different from that cited by the non-accessible using general public participants. A number of participants felt that taxicab drivers probably need some training, but given their association with Wheel-Trans, taxicab drivers tend to be better trained than PTC drivers. Some participants noted that the barrier to entry for PTC drivers is low – accessible vehicle, driver’s licence, and cell phone – and, as a result, they need better training.

Sensitivity training	In providing services, there is a need for <i>“sensitivity training for people with different needs, special needs.”</i>
Customer service	Understanding, helpfulness, courtesy, <i>“treating everyone equally well”</i> , understanding the <i>Accessibility for Ontarians with Disabilities Act</i> .
Service protocols	Protocols in dealing with people with disabilities during pick-up and drop-off (i.e., <i>“helping people to the vehicle.”</i>)
Language skills	<i>“They don’t have enough English. They don’t understand. It’s too complicated for them.”</i>
Safety of the wheelchair	<i>“Uber drivers need to know about the safety of the chair – they need to know how it is to be strapped in....they always want to hook it on the easiest thing they can see...they should have the actual brackets that were made for tie downs.”</i>
Listening skills	<i>“They tend not to listen to customers... they don’t really respect customers like us.”</i>
Need for regular audits	<i>“In addition to the regular training, there is need for regular audits and reviews.”</i>

Accessible service users wanted more opportunities for choice – more accessible vehicles on the road, ability to choose side- or rear-entry vehicles, and more payment options.

Suggested Improvements

Some participants identified the following ways to improve accessible vehicle-for-hire service:

- Increase the number of accessible vehicles on the road during prime and non-prime times
- Give people a choice between rear-entry versus side-entry

Conversion Type

Participants indicated that their preference for rear- or side-entry depends on three factors:

- The road/curb where people are getting picked up or dropped off;
- The type of wheelchair – front wheel, back wheel, and mid wheel; and
- Personal preference.

Payment Options

Some participants liked cordless point of sale equipment in vehicles.

Others talked about the benefit of an app where they can conduct transactions.

3c

DETAILED FINDINGS FOR PROVIDERS OF ACCESSIBLE SERVICE

Virtually all providers of accessible service felt that there isn't sufficient demand for accessible vehicle-for-hire services.

Demand for Accessible Vehicle for Hire

- The biggest challenge identified by the providers of accessible service is the lack of demand for accessible vehicle-for-hire services.

"Compared to Wheel-Trans, the demand for our services is miniscule."

"We are able to accommodate demand for service, but we don't get many calls....it is a matter of how many calls we are getting, how sustainable is that."

"I think the biggest challenge is that these guys have laid out a lot of cash to have an accessible vehicle....and quite honestly with you, the business doesn't come from this. They just don't get the accessible business."

"Drivers with accessible vans need to associate with brokerage because they won't get business from people flagging them or walking up to them."

- It was noted that even the demand for PTC's more economical accessible services is also low: *"even at its discounted rates, the demand is much, much smaller."* It was noted that Uber uses promotions to help increase the usage of its WAV vehicles. An Uber participant also observed the WAV business remains small, but it is growing slowly.
- There was agreement among all the taxicab and PTC service providers that the primary reason for low demand stems from the fact that *"people are going to use Wheel-Trans because it is so much cheaper."* There was also a perception that demand for Wheel-Trans will continue to increase given the demographics of the City's population.
- Moreover, one participant noted that drivers receive requests for their accessible vans for purposes other than helping customers who actually need an accessible vehicle.

"The actual demand for accessible vehicles is much lower than the actual data would suggest."

Virtually all providers of accessible service felt that there isn't sufficient demand for accessible vehicle-for hire services *(Cont'd)*

Public Knowledge and Understanding

- The providers noted that a lot of customers do not like accessible vans. They cited customer resistance was due to several factors -- the lack of comfort in travelling in these vehicles, noise levels, and the difficulty in getting into these vehicles.
"It's not comfortable. It's not business smart. This van is not good for the city, not good for customers, not good for drivers who wasted a lot money on these vans."
- A participant asserted that there is a stigma associated with using accessible vehicles, that is, some customers do not want to be seen to be using an accessible vehicle: *"Customers think that they don't want somebody to see them in a wheelchair accessible vehicle."* The stigma concern was about using an accessible vehicle when it is not physically needed and being seen as taking it from someone who required it.
- Some participants felt that there was lack of public knowledge and understanding about who is able to use accessible vehicles. They believed that most residents of the City were not aware that they are able to use wheelchair accessible vehicles.
"Not everyone knows."
"Some people don't even know about the accessible transportation services available to them."
- One participant noted that the public and police need to be better informed about the time and process in having people with wheelchairs get in and out of accessible vans. It was noted sometimes police are handing out tickets to these drivers for traffic violations.

Virtually all providers of accessible service felt that there isn't sufficient demand for accessible vehicle-for-hire services. *(Cont'd)*

Qualified Accessible Vehicle Drivers

- Another concern expressed was that the qualified accessible vehicle drivers are aging. It was noted that drivers need to have the right physical and emotional abilities.

"Not everybody has the patience or the right temperament or the sensitivity to deal with persons with disabilities. It's very challenging and requires a high degree of professionalism."

Rear Entry Vehicles

- There was some discussion about the safety and level of comfort with rear entry vehicle-for-hire vans. Some concern was expressed about the safety of passengers if the van is involved in a rear-end crash.

"It's not a comfortable ride for the customer."

Serving Customers with Non-Mobility Disabilities

- Some participants generally felt that people with non-mobility disabilities find it easier to get into and out of a smaller vehicle which is lower to the ground, such as a sedan.
- One participant noted that people with cognitive disabilities required specialized services. They noted that they have a specialized service group able to service these customers.

All provider of accessible service participants believed that training is important.

Training Practices at Taxi Brokerages and PTCs

- One participant with a major taxi brokerage noted that they review both the vehicle and the individual: the training covers escorting, assisting, tying down, security and safety.
- Another participant stated that, at her brokerage, they conduct refresher courses and one-on-one coaching.
- One stated that accessible vehicle driver training is essential because people using wheelchairs are “*very sensitive about their wheelchairs because without them they can’t live....they can’t do anything.*” Without thorough training, complaints will start to be made.
- The Uber participant also acknowledged that training is important. He noted that Uber works with an external company to provide online and in-person training.