

City of Toronto

Taxi and Uber Consultation Qualitative Research

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Background and Objectives

- City Council has directed the Executive Director of Municipal Licensing and Standards, to review the operations of Uber and technologies like it, including the interests of the public in the technologies and their impacts on the current taxicab industry. The following items are to be investigated:
 - What by-law changes are necessary to bring new and emerging technologies into regulation as part of the City's for-hire ground transportation industry;
 - How the City can ensure public safety and consumer protection are maintained;
 - How the City can ensure a level playing field is established and maintained with respect to commercial insurance, driver training, equality of fares and other licensing issues; and
 - Ensure the recommended changes are reviewed at least every five years, or when deemed necessary before that time.
- As part of this review, Ipsos was commissioned to conduct research in order to garner the attitudes, behaviour and feedback of residents of the City. Two phases of research were conducted
 - one qualitative and one quantitative.

Methodology: Qualitative

- A mix of focus groups and in-depth interviews were conducted for the qualitative phase in order to effectively consult with the various stakeholders in this issue. The following outlines the qualitative methodology:

Segment	Approach	Details
General population	Focus group of 8-10 participants	Must be aware of Uber
Taxi and limousine users	Focus group of 8-10 participants	Must use taxi or limousine at least once a week
Uber users	Focus group of 8-10 participants	Must use UberX, XL or Select at least once a week
Accessible taxi users	6-8 in-depth interviews	Must take an accessible taxi at least once a month
Taxi drivers	6-8 in-depth interviews	Recruited via City supplied sample list
Limousine drivers	6-8 in-depth interviews	Recruited via City supplied sample list
Uber drivers	6-8 in-depth interviews	

Note on Reporting

- Insights detailed in this report apply to all segments unless otherwise noted.

Taxi, Limousine and Uber USERS



TRANSPORTATION PERCEPTIONS BEHAVIOUR

Top of Mind Issues Facing the City of Toronto



Transportation was top of mind as the main issue facing the city of Toronto. Frustration with traffic, congestion, constant construction, lack of parking, and poor condition of roads all rose to the forefront. Furthermore, dissatisfaction with the TTC was top of mind, specifically lack of service reliability, lack of connectivity/service integration, and high cost.

Getting Around the City

WEEKDAY COMMUTE

TTC or Driving

- Many take public transit daily to work
- Many are also driving to work, typically those who work outside the core downtown area

Taxi/Uber

- A few are taking taxis or Uber to work, usually when they are running late or when there is a TTC service interruption/delay

EVENINGS, WEEKENDS, LEISURE

Taxi/Uber

- Many are using taxi or Uber when going out in the evenings or weekends for leisure to avoid parking, driving in the downtown core, and because they might be drinking

TTC

- Some are using TTC for leisure as well, however limited service hours and inconvenience restricts this option

Several participants note using Uber specifically as a support or replacement to public transportation from a cost and convenience perspective. Because of Uber's competitive pricing, many find value in taking it instead of dealing with service interruptions or delays, transfers within or outside TTC, and the price (especially when traveling with several people).

"Subway is always delayed, faster to take an Uber and it's not even that much more money. Uber is more reliable."

"I have to transfer to York transit and pay again. By the time you do that, why not just take Uber. I do that most times now."

"TTC is not efficient, not keeping pace with people. No customer service. I try to use Uber whenever I can instead."

"When there are a few of us, it doesn't make sense to take TTC when it's going to be six bucks each."

"In a city this size to have two subway lines is ridiculous. Instead of transferring and waiting, take an Uber."

Changes in Transportation Habits

WEATHER

Inclement weather can easily change transportation routines, specifically moving from TTC to taxi or Uber.

“If the weather is bad, you would probably take a taxi, if it’s fine, you could walk to the subway station.”

TRAFFIC, TTC DELAYS

If there are delays on the TTC or someone is already late, they are likely to move from TTC to taxi or Uber.

“When I get up I check to see if the TTC is on time. If it’s not, I will just take Uber.”

TRAVELING WITH OTHERS


Traveling with others is also likely to move from TTC to taxi or Uber. This is mostly driven by price and convenience.

“If you’re with people, you could split it and take a cab or Uber. It’s the same price [as TTC] or cheaper.”

DISTANCE AND DESTINATION

When going farther distances which require transfers within or outside TTC, many are likely to instead take Uber.

“If you’re going out to Brampton or something Uber is way cheaper [than a taxi]. You’re not going to take transit because you have to switch a hundred times.”



In the past several years, many have noticed increases in traffic and congestion in the city, especially the downtown core, and further limits in affordable and available parking. This discourages many from driving. This reality, paired with the perception that the TTC lacks integration and reliability in service, has caused many to turn to Uber, a more affordable option than taxis.



UBER, TAXI AND LIMOUSINE PERCEPTIONS AND ATTITUDES

Top of Mind Associations with Uber



Top of mind thoughts and perceptions of Uber are **very positive** by users and non-users alike. Uber is most strongly associated with the convenient experience it offers, and its position as a cheaper option to taxis and sometimes TTC. It is seen as a high tech, fast, accessible offering which provides greater affordability, control and availability to service than its alternatives.

Uber's Strengths

- More affordable pricing than taxis/limos and sometimes TTC depending on how many people traveling together
 - Price can be estimated prior to ordering ride
- Offers a very convenient experience from beginning to end
 - Intuitive app to order ride without calling
 - Driver information provided to passenger
 - Can track as driver approaches via GPS
 - Pick up at exact location via GPS
 - Follow ride via map on app once in car
 - Disembark without exchange of cash or tipping
 - Instant debit of credit card
 - Can instantly split fares between users
 - Detailed instant green receipt providing ride details including total price, route and gratuity
- Friendly and safe drivers

- Better cars than taxi and limo
 - Cleaner
 - Newer models
 - Option of car classes
 - Sometimes offer bottled water/gum
- Rating system allows for transparency and accountability to drivers
- Better customer service than taxi/limo
 - Issues dealt with quickly and fare often refunded when client unsatisfied with service
 - Proactive customer service when driver poorly rated
 - Promotions, coupons, referral bonus
- Considered safe by most, especially males, through transparent platform
 - Customer reviews
 - Traceable via GPS
- Creates jobs
- More personal and novel experience than taxi/limo

"You can take the same ride and it's usually half the price or less [than a taxi]. Sometimes cheaper than transit."

"The drivers I've had are really friendly. You get a totally different vibe [than taxi drivers]. They are happy to be doing it."

"Before ordering which you want, you look at rating. You know what you're getting."

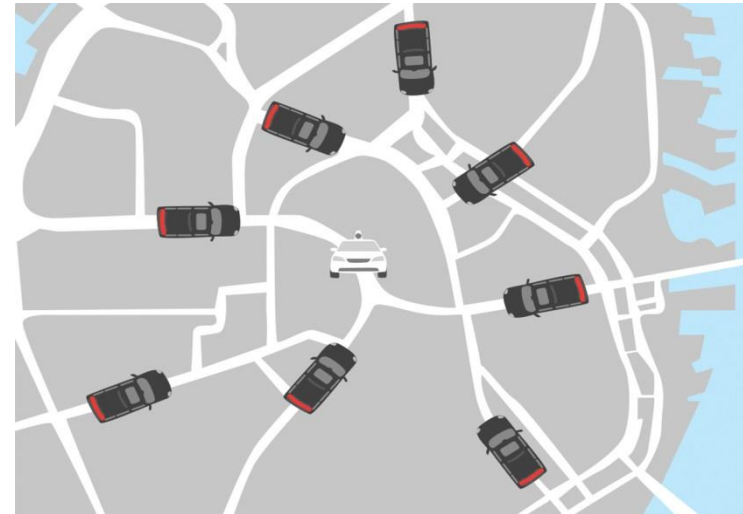
"I gave a bad rating, I was in a bad mood really. I got an email from Uber saying they were sorry and refunding the money."

"I feel I have control being able to follow where they go on my phone...they're not taking you anywhere."

The Uber Experience

Uber is seen by users and non-users as fundamentally distinct from taxi and limo services.

- Uber is seen as different from taxis/limos because using Uber is a fundamentally different experience than using a taxi or limo.
- Almost all participants spoken to find the Uber experience better than that of taxis or limos.
- The unique Uber experience is largely driven by convenience and customer service:
 - Intuitive app to order ride without calling
 - Driver information provided to passenger
 - Can track as driver approaches via GPS
 - Pick up at exact location via GPS
 - Follow ride via map on app once in car
 - Disembark without exchange of cash or tipping
 - Instant debit of credit card
 - Can instantly split fares between users
 - Detailed instant green receipt providing ride details including total price, route and gratuity
 - Issues dealt with quickly and fare often refunded when client unsatisfied with service
 - Proactive customer service when driver poorly rated
 - Promotions, coupons, referral bonus
 - Cars: newer, cleaner, and a greater variety of classes available



"It's nothing like a taxi. The whole thing from beginning to end is different. You just push a button, you get picked up and dropped off without a word."

"Almost like Uber is doing everything the cabs aren't. The drivers, the experience, it's all easier and better and cheaper."

Uber's Weaknesses

- Insurance: unclear who is covered and accountable or if claims will be honoured (i.e. no precedent)
- Surge pricing: unaffordable during TTC delays, inclement weather or other high demand scenarios
- Unknown driver trainer
- Safety, especially for female passengers: nature and extent of background check done by Uber unknown
- Credit card, smart phone and data required to sign up
- Credit card information open to exposure
- Some Uber drivers have less knowledge of the roads and routes
- Can't hail an Uber
- Unclear who to bring concerns to outside Uber

Insurance was by far the most concerning of Uber's weaknesses.
However, for all users and many non-users, Uber's affordability and distinctly convenient experience outweighed its weaknesses.

Non-users main reasons for not using Uber, or not using it more often, were:

- Lack of familiarity with the offering
- Lack of access to a smart phone, data or a credit card
 - Safety concerns about background of driver (especially among women)
- "Hassel" associated with initial sign up, especially requirement of providing credit card information
- Hesitant to use while offering is still in infancy stages (i.e. waiting for kinks to be worked out)

"Liability is very fuzzy. I think Uber is covered if something happens but the driver and passenger, I don't know."

"You may have driver info but you don't know their character. With taxi company they know their drivers."

"I'm a slow adapter. I like to wait and see how it shakes out and see what comes of it."

"I use Uber exclusively and really feel I'm an advocate. I still do have concerns around insurance. It's not clear."

"If something happens and you try to deal with Uber and it doesn't work. Who do you go to?"

Taxi and Limo's Strengths

- More convenient , quick and affordable than TTC especially if traveling with multiple people (direct, door to door service)
 - Especially the case when destination is not well connected to TTC
- Don't have to deal with parking
- More comfortable than TTC
- Conspicuous cars makes them easy to hail
- Limos seen almost exclusively as a route to the airport

Taxis are seen as a better option to TTC in certain cases, when traveling with multiple people, when the destination is not well connected to the TTC or when in a rush.

Overall, there were fewer strengths associated with this service than with Uber.

The main advantage taxis have over Uber is the ability to hail one in busy areas such as entertainment district on weekends.

"Faster and more direct than TTC. There are so many areas that aren't well connected to transit."

"I will usually take one when I need to go downtown and don't want to deal with driving myself or parking."

"When you're coming out of the bar, it's easier to just flag one than to order Uber."

"Not squished like on the subway."

"If there are a few of us, it's cheaper than TTC."

Taxi and Limo's Weaknesses

- Safety: driving too fast, recklessly or distracted via Bluetooth
- Circuitous route to increase fare
- Expensive: unaffordable to many people
- Long waits for pick-up, especially during TTC interruptions, inclement weather, or special events in the city
- Inequitable system: perception that those who drive do not necessarily reap fair rewards
- Poor customer service from driver and dispatch (i.e. driver often unfriendly, dispatch not helpful)
- Won't take certain fares depending on destination and/or distance
- Hygiene and condition of vehicle
- Requires cash on hand (i.e. not all have debit machines)
- Won't wait if delayed

Overall, there are many weaknesses associated with taxi/limo service.

One of Uber's major strengths is its ability to address the weaknesses customers experience with taxis and limos.

"It's not affordable. You have to take public transportation sometimes. That is expensive too."

"Here we have a system where the poor remain poor and the rich remain rich."

"You call Beck if you have a bad experience and they're like 'ya, ya' and hang up."

"They will take a longer route to run up the meter. I've even been refused before because they don't want to go."

"They're always driving fast because they want to get to the next ride. It's not safe."



ROLE OF THE CITY

Oversight of Taxis/Limos and Uber

- As seen in the previous section, taxis/limos and Uber are seen as a fundamentally different service because of the very different experience felt by users.
- Because the service is seen as being fundamentally different, users and non-users alike **do not want to see Uber regulated in the same way as taxis and limos.**
- There is the perception by users and non-users that taxis/limos are overregulated, and they do not want to see the same thing happen with Uber, since they expect this will drive up the price.
- In addition to the City not over regulating Uber, many wished to see a lessening in regulation on taxis and limos in order to make them more competitive.
- Users and non-users do want to see some minimum guidelines and oversight on Uber, **most of which they want in the way of auditing rather than the City owning the information.**

"Government should oversee Uber but not take over. Make sure checks they're doing are proper but do not check for them."

"It's a different service.. I don't want it regulated the same as cabs."

"More City involvement, more fees, more duties, more licensing costs, going to drive up the cost [of Uber]."

"Take down regulation on taxis. It's a mess. If they are less regulated, they can be competitive with Uber."

"Regulate them [Uber] the same way as taxis, and the service seizes to exist. It's just another Beck."

Minimum Oversight of Uber: Insurance

- Insurance is a key concern for all spoken to, both users and non-users.
- There is an expectation that the City will create guidelines and/or oversight in this domain.
- The following areas related to insurance were expected:
 - Force clarity on Uber's insurance policy which is seen as nebulous at best (i.e. who does it cover? How extensive is the coverage? Etc.)
 - Create clear insurance guidelines to follow
 - Encourage creation of dual insurance coverage so vehicle can be used for both personal and commercial purposes

"Insurance is the one place I think they [City] need to step in a bit and see what's going on."

"Insurance is my only real concern as someone who uses it. I think Uber's coverage needs clarification."

"Ontario is behind the curve. There are provinces that already have combined insurance to allow this."

"I want to know who is covered. The passenger? The driver? Or only Uber?"

"Insurance is the number one thing on my list [for the City to regulate]."

Minimum Oversight of Uber: Drivers

- Most also expected some oversight around Uber's drivers, specifically background checks and driving training.
- This sentiment was especially important for female participants, in order to feel safe when using Uber.
- Most who wanted to see oversight in this area preferred that the City's role be that of an auditor rather than the body to own this information. The City performing checks of background checks and driving training to ensure compliance was seen as sufficient, and allowed Uber to continue operating in an autonomous manner.

"I don't think the City needs to have its fingers all over Uber. Just do checks to make sure they're doing their checks."

"The City needs to confirm with Uber the record checks are done."

"The City should do random checks here and there. Make big fines and then they will be scared not to do it."

"The City should create guidelines for background checks and then Uber has to follow."

"Driving training or criminal record. Those are so important. The City should make sure they're doing them."

Taxi, Limousine and Uber
DRIVERS



UBER DRIVERS

Work Information

TYPICAL SCHEDULE

Most Uber drivers spoken to are doing so part-time and also have another full-time job. Thus most are working a couple week nights for short shifts, but mainly on Friday night, Saturday and Sunday.

A few are doing Uber as their primary job, but these drivers were in the minority.

"The weekend is the busiest. That's when you make the most and when I would work the most."

"I will do a few hours after my regular job and also on weekends for about 4 hours at a time."

RIDES AND FARES

Uber drivers noted that the number of rides in a given shift is highly variable. Some offered an average of 8-10 rides per shift.

The average fare was cited between \$8-\$12.

"It really depends on the shift. It's hard to give an average [of rides per shift]."

"I'd say fares are usually \$8 to \$10."

PICK-UP AND DESTINATION

Most pick ups and destinations were in and around the downtown area. On Friday nights and weekends, the downtown core was specifically cited since many passengers are traveling to the main entertainment districts.

"Mostly around the downtown area. You get rides going up town or Beaches now and then as well."

"Majority are in the entertainment district. Richmond and John area...Queen and Ossington."

INCOME

Average income in a given week varied, but most cited somewhere between \$300-\$600.

A few noted that they have a target they set any given week and they will work whatever hours it takes to achieve it.

"I set myself a goal for a week and then I keep putting in hours until I get there or close at least."

"Can depend on the weekend, but if it's a good one, I can do \$350-\$400."

Reasons to Drive for Uber

Earn Supplementary Income

- Many Uber drivers spoken to also have other full-time jobs. They are using driving for Uber as a supplement to their existing income. This was the most common reason to become an Uber driver.
- The cost of living in Toronto and the insufficient wages earned were cited as reasons to seek a supplementary income.

“Lifestyle is expensive here. Sometimes you need two jobs to survive.”

“My partner is in school away from home. It’s expensive...no money coming in and we have to travel to see each other. This helps pay for some of that.”

“Good supplement for my income.”

Flexible Work Hours

- Having the ability to supplement income with hours that are completely under their control and according to their schedule was very compelling for Uber drivers.

“You can basically turn on and off the system whenever you want. It’s in your hands.”

“It’s on your schedule. You can work as much or as little as you need to.”

Be Part of Share Industry/Alternative to Taxis

- A few Uber drivers noted that they had a desire to be part of the share industry and/or provide an alternative to traditional taxis. Many felt this was an important endeavour with the high prices and low service quality of taxis in Toronto.

“I want to be part of the future of transportation. Giving people something better than taxis.”

“Being part of the share service world is a reason for me. It’s where things are going.”

Concerns Driving with Uber

Insurance

- Insurance is by far the most common and glaring concern for all Uber drivers spoken to. All noted concerns around the vagueness of the insurance requirements and insurance coverage provided through Uber. Many admitted there is an inherent risk driving for Uber due to insurance concerns.

“As far as insurance I don’t feel it’s sufficient.”

“It’s [insurance] a little fuzzy. I wish it were a bit more transparent. Let’s just say I hope I never get in to an accident with a passenger in the car.”

Change in Pay

- Further reductions in their monetary take away is of concern to drivers, and has the potential to discourage them from continuing to drive with Uber, specifically if their break even point is affected.
- Both reductions in fare prices and increases in Uber’s commission were concerns noted in this domain.

“Further reduction in the fares or Uber increasing their commission [is a concern that would discourage continuing to drive].”

“If they lowered the rates in any way, it would start to get towards minimum wage and I would drop it. Not worth the risks if you’re making less.”

Concerns Driving with Uber

Safety

- A few Uber drivers noted concerns about their safety when picking up unknown passengers.

“My personal experience was one time I had a weird customer that I reported to Uber. I didn’t feel safe. It was at night time, it was scary and didn’t feel safe at all.”

Taxation

- A few Uber drivers also noted the vagueness around their obligation to pay HST. This was a concern as it had the potential to impact their monetary take away.

“Concern about taxes being charged on it. No HST on these trips. Uber has given a strange response on that. We may be responsible for paying HST at some point.”

Role of the City

- Uber drivers were quick to note that Uber should not be regulated in the same way as taxis and limos.
- Furthermore, Uber drivers were concerned about the possibility of over regulation resulting in Uber prices no longer being competitive.
- However, almost all Uber drivers spoken to felt there should be some type of oversight regarding insurance, with a few also open to oversight in the area of driving safety and background checks.
- Drivers believed an audit system would be most appropriate; to have a body such as the City go in to Uber every 6-8 months to ensure compliance of specific guidelines or requirements.

"I would hope to see regulation to make sure that drivers are adequately insured. And also to ensure that Uber is operating in a safe and prudent manner."

"Someone like the City should be auditing that to ensure that they are actually verifying these things. They [Uber] should be doing background checks, but I'm not sure that they are. I don't trust them overseeing on their own. They need to open up their books and let someone audit their practices."

"The City shouldn't control everything. Allow companies to run themselves and provide oversight. Instead of doing background checks through City, let Uber do it but go in every 6 months or so and ensure they are doing them."

"I'd like to see them assure that the insurance and licensing is all legit. Safety is first. I don't think it should be compared directly to the taxi model which is archaic."



TAXI AND LIMOUSINE DRIVERS

Work Information

TYPICAL SCHEDULE

Most taxi and limo drivers spoken to are working 10-12 hours per day, 6 days a week.

"I work at least 10 hours a day, 6 days a week."

"I only take one day off a week. 12-14 hours per day."

RIDES

Driver cited anywhere from 8-20 rides per day, depending on the weather or simply luck.

Many taxi drivers specifically noted a decrease in business from Uber.

"It depends on the day. Some days you are lucky and you can get many rides. Some days you sit."

"On days like today, no business. People walk. When it's raining then they want a taxi."

PICK-UP AND DESTINATION

Most pick ups and destinations were in and around the downtown area. Some also noted trips to the east and west end, as well as mid and uptown.

For limo drivers, the airport and prominent downtown hotels were popular pick up and drop off destinations.

"Most of the business is downtown core. Financial district to uptown where people live."

Perspective on Uber

- Taxi and limo drivers had somewhat differing perspectives on Uber.

Taxi Drivers

- All taxi drivers spoken to saw Uber as directly affecting their business. Many cited a noticeable and significant decrease in rides since the popularization of Uber in Toronto.
- According to taxi drivers, because Uber is unregulated and thus not required to pay licensing and various other obligatory mandates through the city (driver training, etc.), their prices are more competitive than what they are able to offer.
- Many taxi drivers also noted that Uber drivers are not insured and thus there is an inherent danger to riding in an Uber for both the driver and the passenger.

“We are licensed, we drove for many years. It’s regulated and we pay commercials insurance. We have to get a new car every 7 years. Everything is examined. We have to pass that test. We have so many things to pay. Licensing and renewal fees. We are trained, have to take the refreshment course. We pay for that too.”

“UberX they don’t pay anything. Taxis we have so many expenses, training, police check, insurance, CPR. Plus when we enroll or work in the company, we have to pay that company every month. I pay \$575 just to get dispatch calls. For Uber, they just fill up the gas and go. They are cutting off all these people who are paying so much every month. The technology is good, but we have so many taxis already. Now there are triple the cars on the road because of Uber. I used to work at night. Now I can’t work nights. The whole city is UberX taxis.”

Perspective on Uber

Limo Drivers

- Although limo drivers had similar sentiments about the unregulated nature of Uber, and thus its ability to operate at more competitive prices, limo drivers did not see Uber as a direct competitor. While some noted Uber has the potential to take some of their business, most felt there would always be a separate role in the market for limos, since they provide a more niche service than taxis. This was especially the case for limo drivers who serve on retainer for companies. They felt their ability to provide personalized and trusted service trumped the marginally lower price of Uber.
- Furthermore, several limo drivers cited strengths associated with Uber over taxis such as cleanliness of cars, up to date technology giving passengers more information about the car and driver, on demand service, and no exchange of cash.

“The executive limo industry in Toronto is great. There’s high demand for on-time, clean cars that are less than 5 years old, and you can make a living providing that service. That’s not going away.”

“Uber is taking away the shadiness that taxis in Toronto have. They get rid of the monetary transaction, tell you who’s coming in what car, and allow you to track everything with the app.”

Role of the City

- Taxi and limo drivers wanted to see some amount of oversight over Uber in order to ensure a more level playing field in terms of cost.
- Most taxi drivers spoken to wanted to see Uber regulated in a similar way to them – requiring a license, commercial insurance, and following the same obligatory guidelines (driving training, background checks through the City, etc.)
- While limo drivers also wanted to see a more level playing field, they were more likely to suggest an audit system, where Uber is forced to follow certain regulations but compliance is only periodically audited by the City.
- Taxi and limo drivers also saw the potential for the City to relax certain rules and regulations they must follow. Some suggested the minimum fare be decreased, while others felt continuous driving training was unnecessary and costly.

“We go for driving training every so many years. We don’t need this. We know the roads. We know how to drive. This costs us but we don’t need it.”

“You used to be able to get around your neighbourhood for \$5. Now that’s not possible. Make those small trips more affordable to everyone...start [the meter] at a lower price.”

Thank you.

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CITY OF TORONTO

Taxi and Uber Consultation

QUANTITATIVE RESEARCH

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GAME CHANGERS



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BACKGROUND AND OBJECTIVES

- City Council has directed the Executive Director of Municipal Licensing and Standards, to review the operations of Uber and technologies like it, including the interests of the public in the technologies and their impacts on the current taxicab industry. The following items are to be investigated:
 - a) What by-law changes are necessary to bring new and emerging technologies into regulation as part of the City's for-hire ground transportation industry;
 - b) How the City can ensure public safety and consumer protection are maintained;
 - c) How the City can ensure a level playing field is established and maintained with respect to commercial insurance, driver training, equality of fares and other licensing issues; and
 - d) Ensure the recommended changes are reviewed at least every five years, or when deemed necessary before that time.
- As part of this review, research is desired in order to garner the attitudes, behaviour and feedback of residents of the City. The following outlines Ipsos' proposed approach to this public consultation.

METHODOLOGY

- The quantitative phase of research consisted of a representative online survey of n=1,004 adult Toronto residents (18+).
- The sample for the survey was sourced from a mix of pre-recruited iSay sample and non-panel random Ipsos Ampario sample. Quotas and weighting were used to ensure the sample was representative of the surveyed population by age, gender and region accordingly to the latest Census figures.
- Fieldwork was conducted between July 31st -August 10th 2015

KEY FINDINGS (1)

- **One in five Toronto residents (21%) have used an Uber service in the past year and one in ten use either UberX (12%) or UberTaxi (11%) at least once a month. Comparatively, six in ten (58%) have taken a taxi in the past year and three in ten use the service at least once a month (28%).**
- **While residents are less likely to have used Uber compared to Taxis, those who do use Uber do so much more frequently; nearly twice as many Uber users take it weekly (29% and 28% take either UberTaxi or UberX at least once a week) compared to taxi users (17% use it weekly).**
- **Satisfaction with Uber is high and the lower cost of the service (vs. taxis) and the quality of the mobile app (ability to order, pay and track vehicles) are the main reasons why people use Uber. Adequate insurance/liability coverage is the primary weaknesses for the service and there remains some confusion about what currently exists and how this is managed.**
- **Most Uber users are taking the service more often than they did a year ago (particularly women) and nearly half report taking taxis less often compared to before they started using Uber.**

KEY FINDINGS (2)

- While the vast majority of Toronto residents say they know UberX, XL and Select are not regulated, there are some misconceptions about the role the City plays in regulating fares and driver training for Uber thus overall familiarity with Uber services is low.
- Satisfaction with taxi services is much softer and while most taxi users have at least a somewhat positive impression, persistent concerns about cost, courteousness of drivers, and cleanliness of vehicles are negatively impacting opinions.
- There is a strong sentiment among Toronto residents that people should be able to choose for themselves whether they want to use Uber or taxi services and a majority feel that having both Uber and Taxi services provides Toronto with a competitive marketplace. Few feel that Uber should charge the same as taxis.
- Residents also expect that they City provide rules to protect passengers personal safety and help ensure safe driving behaviour among providers.

KEY FINDINGS (3)

- **Toronto residents are most inclined to support regulation of all vehicle-for-hire services that aim to protect passenger safety, including primarily criminal background checks for drivers, safety training for drivers, protection in case of bad/unsafe service, insurance/ liability coverage, and on-going driver training. Support is lowest for regulation for driver income, fares, and for availability of vehicles at peak times.**
- **When thinking about regulation for taxi, limo or Uber services specifically, the vast majority of residents feel that background checks for drivers, safety training for drivers, and insurance/ liability coverage should apply to all three services. The majority of Toronto residents feel that Uber should have the same insurance/ liability coverage as taxis are required to have, including a majority of Uber users.**
- **Support is more mixed for other regulations and residents are somewhat less inclined to feel that all the same regulations should apply to Uber as taxis or limos, particularly when it comes to regulated fares.**
- **Half of residents would be comfortable with Uber operating with less regulation than taxis and the same proportion feel that regulations on taxis should be relaxed to allow them to compete with Uber.**

KEY DIFFERENCES BY DEMOGRAPHICS

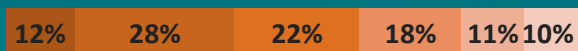
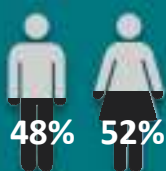
- Usage of public transit, taxis and Uber is highest among younger residents, while older residents are more likely to have used a limo in the past year.
- Younger residents are generally more positive to Uber and to feel that regulations on taxi and limo services haven't created a better service than what Uber offers, that Uber is the way of the future and shouldn't be hindered by unnecessary regulation, that Uber should be allowed to operate even if it doesn't have as much regulation as taxis or that regulations on taxis should be relaxed to allow them to compete with Uber.
- Older residents are more likely to know that Uber isn't regulated in the City of Toronto and to be supportive of all types of regulation in the vehicle-for-hire industry. They are also more likely to agree that Uber should have the same insurance/ liability coverage as taxis and that the City should limit Uber drivers and decrease it from current levels.
- Female residents are more likely to report using Uber more often than they did a year ago and to cite cost as the main reason they use the service, while male residents are more likely to use UberBlack, XL, Select or Pool.
- Female residents are more likely to be supportive of regulation for all vehicle-for-hire services and are generally more positive towards taxi service specifically in terms of personal safety.

KEY DIFFERENCES BY TAXI AND UBER USERS

- All three user groups are more likely to take all transportation services mentioned and the vast majority of regular Uber users are also taxi users, while half of regular taxi users have also used Uber. Uber users are also more likely than the general population to report taking taxis more often than before using Uber.
- Agreement among these groups is also higher that Uber should be allowed to operate even if it isn't as regulated as taxi services, that regulations on taxi services should be relaxed to allow them to compete with Uber, that current regulations do more to protect the taxi and limo industry, that regulations haven't created a better service than what Uber offers and that Uber is the way of the future and shouldn't be hindered with unnecessary regulation.
- All three groups are also more likely to falsely believe that Uber requires a license to operate and that the City regulates driver safety training and what Uber can charge.
- Uber users (UberX or UberTaxi) are less likely to support regulation on any vehicle-for-hire services and are less likely to feel adequate insurance/ liability is an important factor in vehicle-for-hire service
- Taxi users are less likely to support regulation of taxi services specifically (except in terms of driver income), while both Taxi and UberTaxi users are more likely to feel that Uber should be required to charge the same as taxi services.

Profile of Users

Taxi

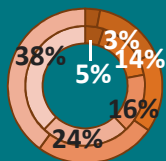


AVERAGE AGE - 42

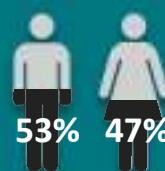


AVERAGE INCOME - \$78,500

- YORK
- EAST YORK
- ETOBICOKE
- NORTH YORK
- SCARBOROUGH
- TORONTO



Uber X

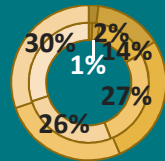


AVERAGE AGE - 33

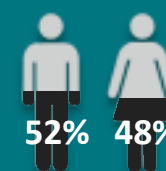


AVERAGE INCOME - \$80,800

- YORK
- EAST YORK
- ETOBICOKE
- NORTH YORK
- SCARBOROUGH
- TORONTO



Uber Taxi

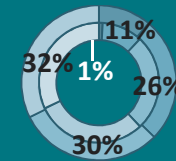


AVERAGE AGE - 36



AVERAGE INCOME - \$78,800

- YORK
- EAST YORK
- ETOBICOKE
- NORTH YORK
- SCARBOROUGH
- TORONTO





Ipsos Reid

DETAILED FINDINGS

GAME CHANGERS





Ipsos Reid

UNDERSTANDING BEHAVIOUR

GAME CHANGERS



UNDERSTANDING BEHAVIOUR

Familiarity and Usage of Services:

- Toronto residents are by far most familiar with public transportation and over nine in ten (95% very/ somewhat familiar) followed by eight in ten for taxi services (80%). Fewer than half of residents feel familiar with either limo service (44%) or Uber (42%). Familiarity with specific Uber services is even lower and residents most familiar with UberTaxi (28%) and UberX (22%).
- The vast majority of Torontonians have used public transit at least once in the past year (88%), while six in ten have used a taxi (58%) and one in five an Uber service (21%) or a limo (17%)
- Frequency of public transit usage is the highest of the services tested, two-thirds (65%) of Toronto residents who have used transit in the past year report taking it weekly. Nearly four in ten (37%) Uber riders use the service weekly compared to one in five (17%) who use a taxi the same frequency and only 7% use limos at least once a week.
- UberTaxi (29%) and UberX (28%) are the most frequently used Uber services with around three in ten Uber users taking them service on a weekly basis, followed by UberPool, Black, XL and Select which all have similar weekly usage (15-17%).
- The majority of Uber users (63%) are taking the service more often than they did 12 months ago, while three in ten (28%) use it the same amount and one in ten (9%) less often.
- Nearly half of Uber users report using taxis less often (46%), one third (34%) the same amount and around two in ten (16%) more often. Four percent (4%) report not using taxis before Uber.

UNDERSTANDING BEHAVIOUR

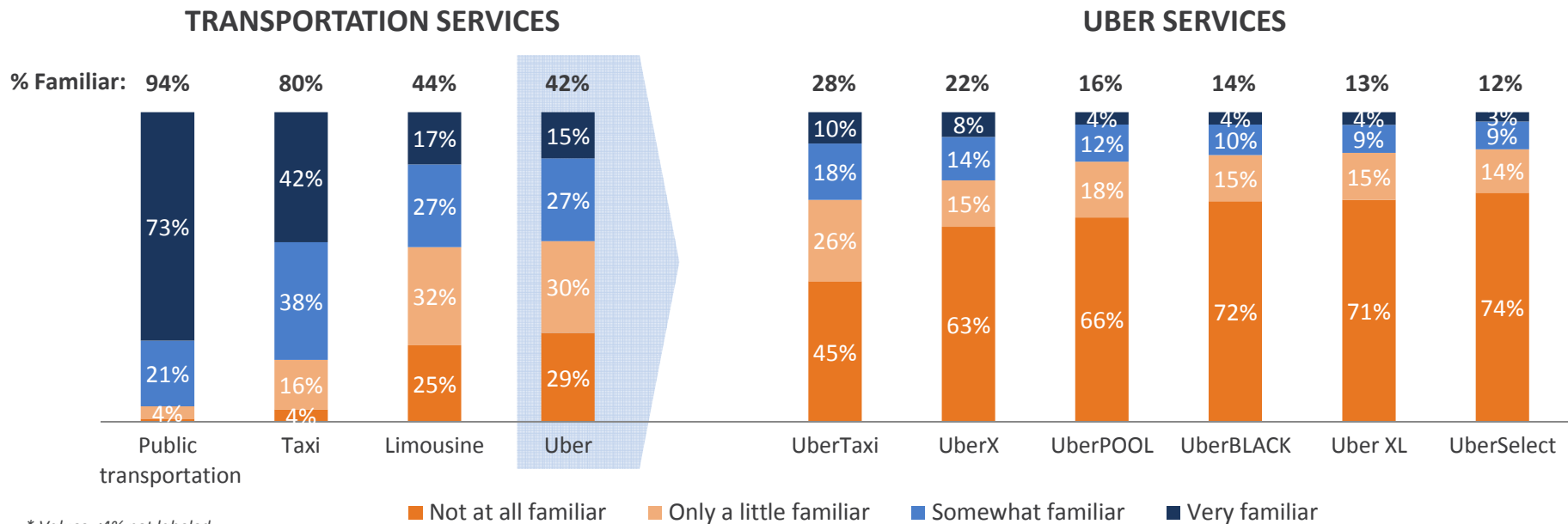
Familiarity and Usage of Services (cont'd)

- Among the four in ten (42%) Toronto residents who haven't used a taxi in the past 12 months, nearly four in ten (37%) would be likely (very/ somewhat) to do so at some point in the future. Those likely to use a taxi in the future cite the need for a specific situation which would require a taxi, while those unlikely to take a taxi indicate they have other preferred means of transportation (i.e. own a car) or feel taxis are too expensive.
- Comparatively, of the eight in ten who haven't used Uber (79%) around three in ten (31%) would be likely (very/ somewhat) to use it in the future. Those likely to do so cite it as cheaper than alternatives or a new service they would like to try, while those unlikely to take the service indicate they prefer licensed/ insured/ regulated taxis, that they are unfamiliar with the service or have concerns about safety.

UNDERSTANDING BEHAVIOUR

Familiarity with Transportation Services

- Nearly all residents feel familiar (very/ somewhat) with public transportation, while eight in feel they are familiar with taxis.
- Around four in ten are familiar with either limos or Uber, while familiarity with specific Uber services is even lower and only three in ten who feel they know Uber Taxi very or somewhat well, followed by Uber X at two in ten.



* Values <4% not labeled

- How familiar would you say that you are with the following types of transportation in the City of Toronto?
- How familiar would you say that you are with the following Uber services?

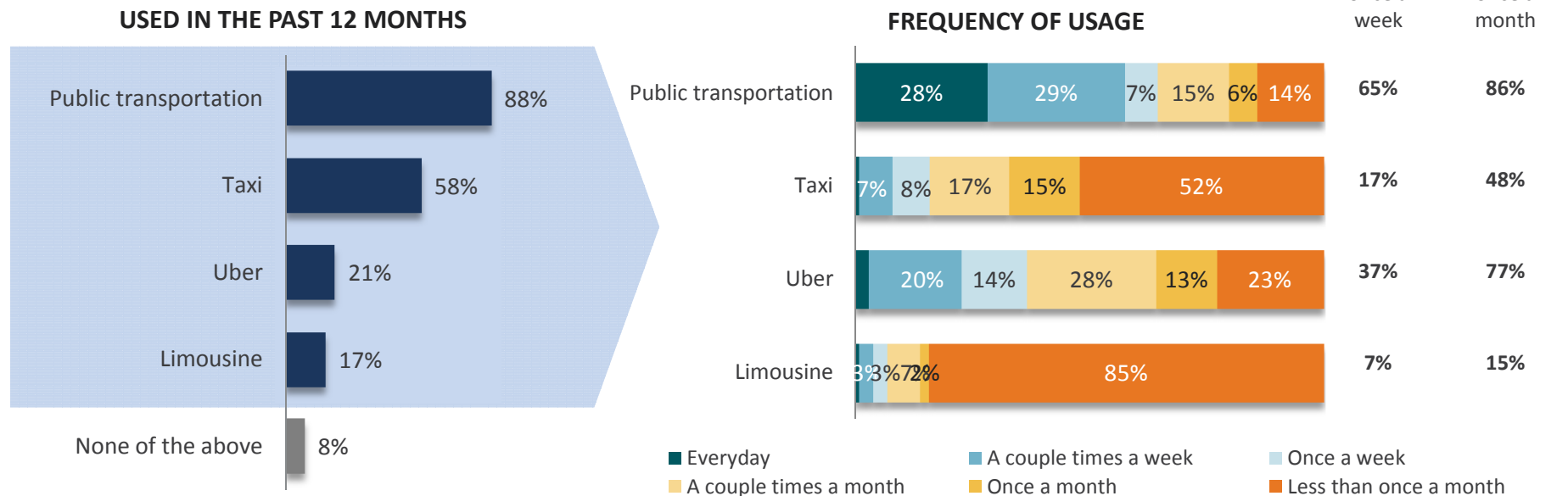
Base: All respondents (n=1004)

UNDERSTANDING BEHAVIOUR

Ipsos Reid

Usage and Frequency of Transportation Services

- At nearly nine in ten, the vast majority of residents have used public transit in the past 12 months, while six in ten have used a taxi and one in five have used either Uber or a limo.
- Among users, two thirds use public transit at least once a week, while nearly four in ten use Uber the same frequency.
- Fewer than one in five use taxis on a weekly basis and fewer than one in ten use limos at least once a week.



3. Which, if any of the following types of transportation have you used in the City of Toronto in the past 12 months? Base: All respondents n=1004

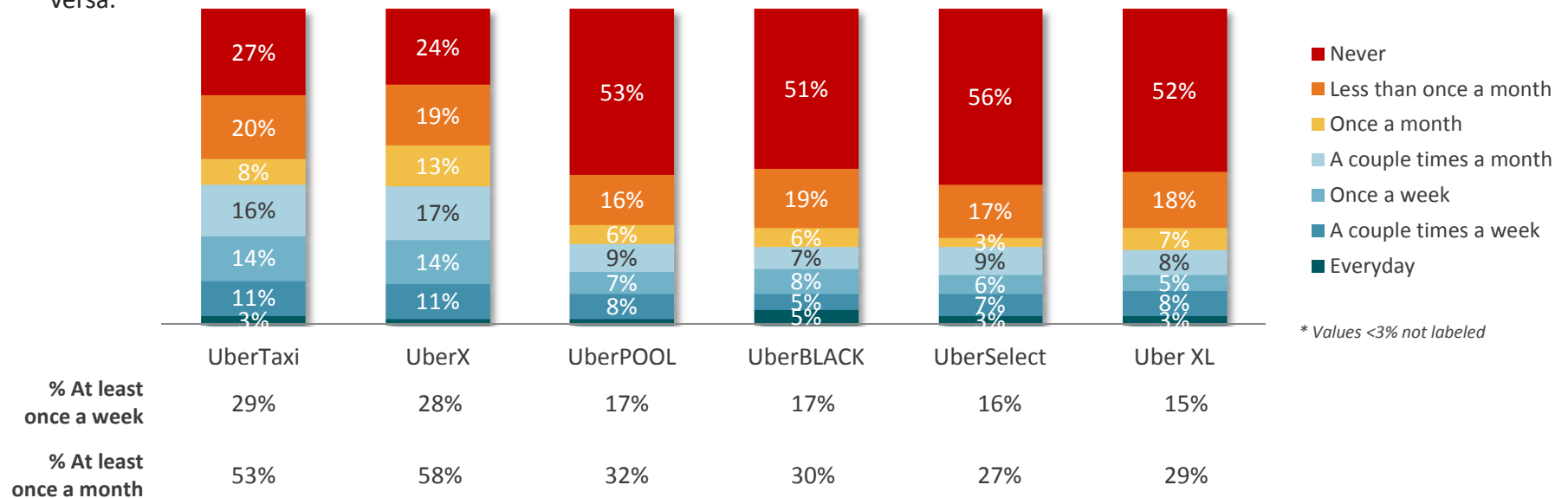
4. How often, on average, have you used the following types of transportation in the past 12 months? Base: varies

* Values <4% not labeled

UNDERSTANDING BEHAVIOUR

Frequency of Use of Specific Uber Services (Used in Past Year)

- Among those who have used an Uber service in the past year, usage is highest for UberTaxi or UberX with around three in ten using each service on at least a weekly basis. Fewer than one in five report have using any of the additional services mentioned on at least a weekly basis.
- Uber users tend to use multiple services and a majority of those who use UberX also use UberTaxi at least once a week and vice versa.



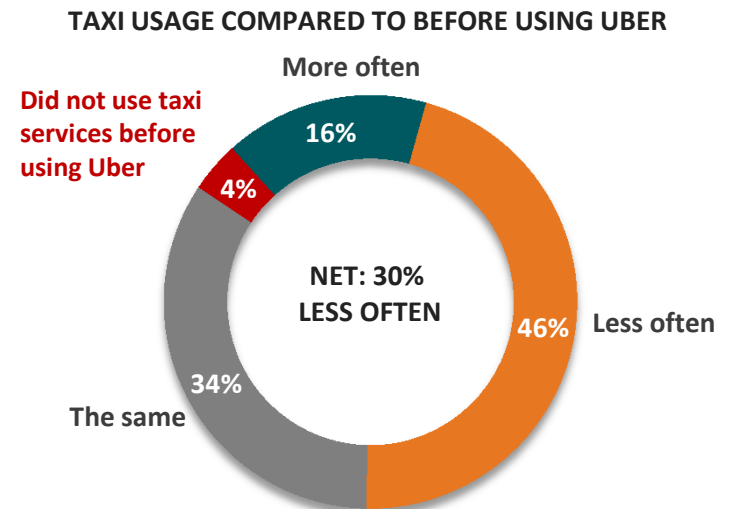
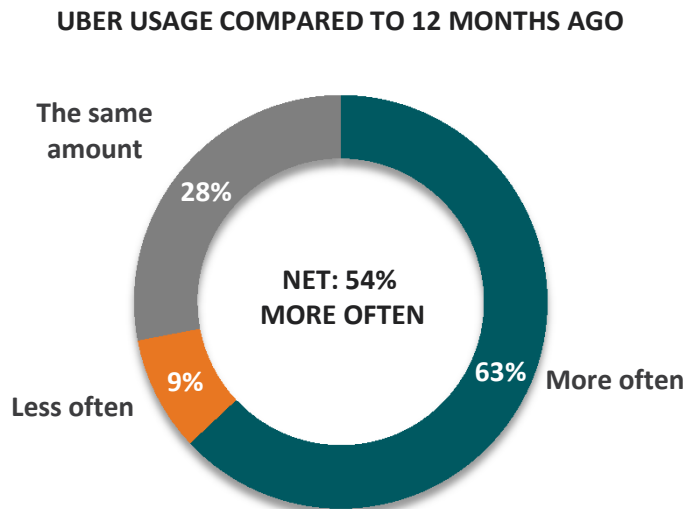
5. How often do you use the following types of Uber Services?

Base: Have used Uber (n=210)

UNDERSTANDING BEHAVIOUR

Uber and Taxi Usage (among Uber users)

- At more than six in ten, the majority of Uber users report using the service more often than they did a year ago, while three in ten use it the same amount of only one in ten less often.
- Nearly half of Uber users indicate using taxis less often than they did before using Uber, while one third use taxis the same amount and fewer than two in ten more often.



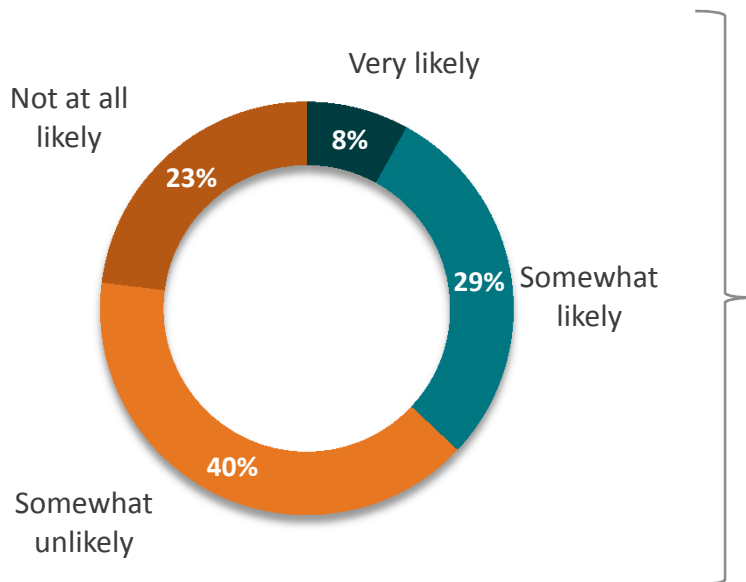
6. Would you say that you use Uber more often, less often, or the same amount as you did 12 months ago?

7. 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 (n=210)

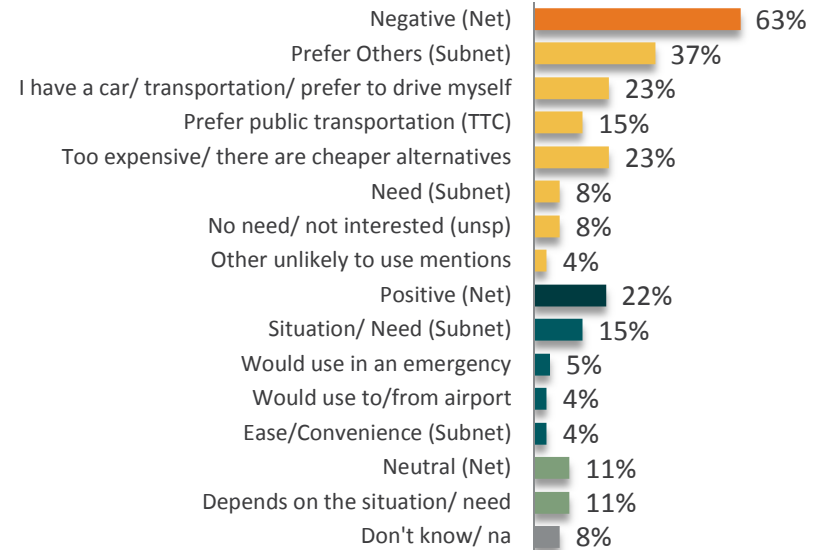
UNDERSTANDING BEHAVIOUR

Likelihood to Use Taxi Service in the Future

- Among those who haven't used a taxi in the past 12 months, around four in ten would be likely to use one in the future.
- Those likely to do so cite the need for a specific situation which would require a taxi, while those unlikely indicate they have other preferred means of transportation or feel taxis are too expensive.



WHY DO YOU SAY THAT?



*Responses <4% not shown

8. You mentioned that you have not used a taxi in the past 12 months, how likely would you be to use a taxi service in the future?

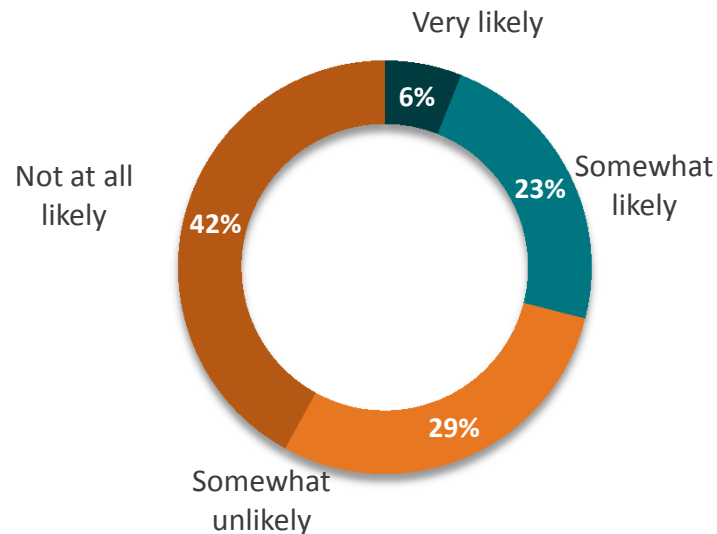
9. Why would you say that you would be [insert response from Q8] to use a taxi service in the future?

Base: Have not used Taxi in the past 12 months (n=419)

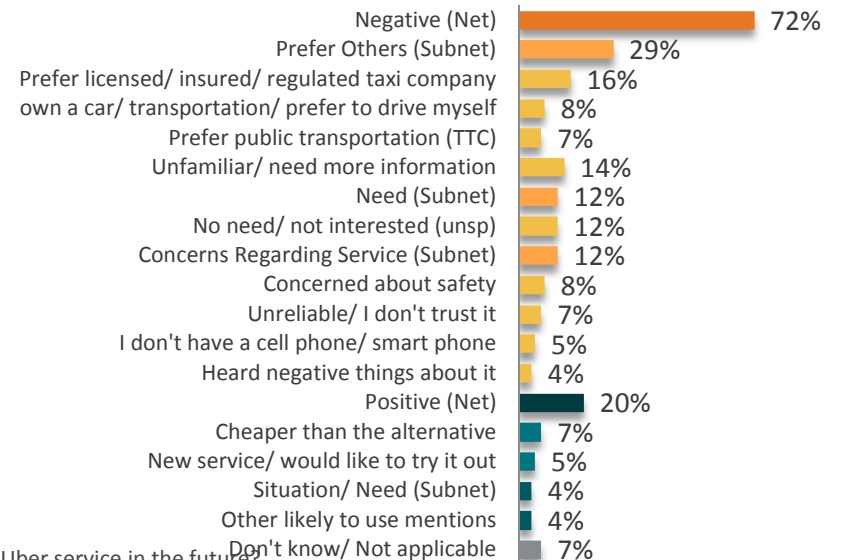
UNDERSTANDING BEHAVIOUR

Likelihood to Use Uber Service in the Future

- Among those who haven't used Uber in the past 12 months, around three in ten would be likely to use it in the future.
- Those likely to do so cite it as cheaper than alternatives or a new service they would like to try, while those unlikely indicate they prefer licensed/ insured/ regulated taxis, that they are unfamiliar with the service or have concerns about safety.



WHY DO YOU SAY THAT?



*Responses <4% not shown

10. You mentioned that you have not used Uber in the past 12 months, how likely would you be to use Uber service in the future?

11. Why would you say that you would be [insert response from Q10] to use Uber in the future?

Base: Have not used Uber in the past 12 months (n=794)



OPINIONS TOWARDS REGULATION OF VEHICLE- FOR-HIRE SERVICES

OPINIONS TOWARDS REGULATION OF VEHICLE-FOR-HIRE SERVICES

Support for regulation:

- When considering vehicle-for-hire services overall, support is highest for the City to relate areas that would help ensure passenger safety, mainly criminal background checks for drivers (86% strongly support), safety training for drivers (85%), protection in case of bad/unsafe service (84%), insurance/ liability coverage for passengers (82%) or regularity of driver training (79%).
- Support is lower, relatively speaking, for emergency flashing lights (48% strongly support), markings on vehicles (46%), training of road networks (46%), cameras in vehicles (45%) or customer service training (45%) however nearly a majority strongly support regulation in each area. Support is lowest for regulation for driver income (24%), fares (38%) and availability of vehicles at peak times (38%)
- When thinking about regulation for taxi, limo or Uber services specifically, residents are most likely to prioritize criminal background checks for drivers, safety training for drivers and insurance/ liability coverage and the vast majority feel they should apply to all three services. Support is lowest for regulating market fares.
- Toronto residents are less inclined to feel that the same regulations should apply to Uber as taxis or limos, however a majority agree to most areas mentioned. Residents are most split when it comes to regulating fares where two-thirds feel this should apply to taxi (66%), six in ten to limos (59%) and just under half to Uber (48%).

OPINIONS TOWARDS REGULATION OF VEHICLE-FOR-HIRE SERVICES

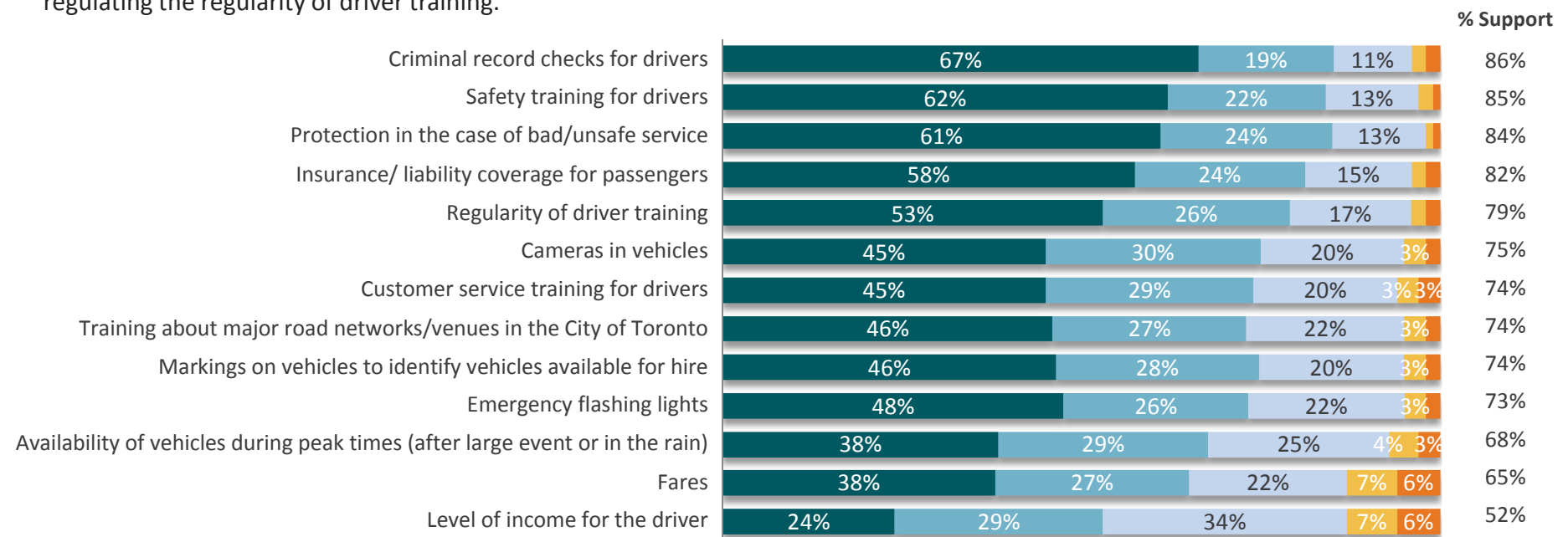
Support for regulation (cont'd):

- At eight in ten (79%), the vast majority claim to know that UberX, XL and Select services are not currently regulated by the City.
- Most Toronto residents agree that people should be able to choose for themselves whether they want to use Uber or taxi services (80% strongly/ somewhat agree), of which half of residents strongly agree (51%). Agreement is also relatively high that Uber drivers should be required to follow the same regulations as taxi drivers (69%), while residents are less decided on whether Uber should be allowed to operate even if their services are not as regulated as taxis (51%) or if regulations for taxis should be related to allow them to compete with Uber (50%). Residents are least likely to agree that Uber should charge the same as taxi services (30%).
- Opinions are split towards regulation of Uber with just over half (56%) who agree that the same rules and regulations that apply to taxi services should apply to Uber in order to ensure the same standards apply and to ensure customers are protected, while just closer to four in ten (44%) feel that Uber does not need to be as regulated and ultimately it is the responsibility and choice of the customer.
- Toronto residents are also divided on whether the city should limit the number of Uber drivers or taxi cabs, while the majority feel the City should play a role in each area (61% and 67% respectively) attitudes are divided as to what should be done.
- Three in ten feel the City should decrease the number of Uber drivers (30%) while two in ten think it should be kept steady (20%) and one in ten increased (10%); comparatively, four in ten (39%) feel it shouldn't be regulated at all. In terms of taxis, the largest proportion feel the number of taxis should be keep at the current level (38%), while fewer than two in ten feel they should be increased (16%) or decreased (14%) and one third think it shouldn't be regulated at all (33%).

OPINIONS TOWARDS REGULATION OF VEHICLE-FOR-HIRE SERVICES

Support for Regulations on Vehicle-for-Hire Services

- At two-thirds of residents, the vast majority 'strongly support' criminal record checks for drivers, followed by nearly six in ten for safety training for drivers, protection in the case of unsafe service or insurance/ liability coverage. Closer to half 'strongly support' regulating the regularity of driver training.



12. Thinking about the role of the City of Toronto in regulating vehicle-for-hire services, how much do you support or oppose the City regulate each of the following areas?

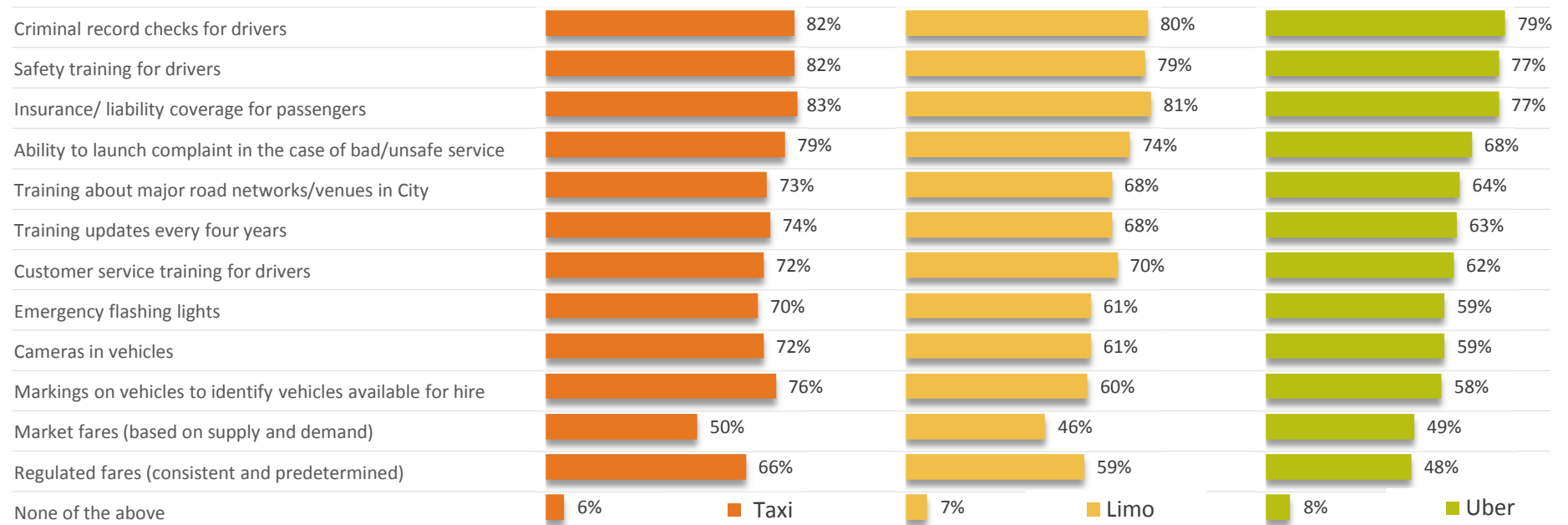
Base: All respondents (n=1004)

■ Strongly support
 ■ Somewhat support
 ■ Neither support nor oppose
 ■ Somewhat oppose
 ■ Strongly oppose

OPINIONS TOWARDS REGULATION OF VEHICLE-FOR-HIRE SERVICES

Attitudes Towards Regulation of Specific Transportation Services

- Residents are most likely to prioritize criminal background checks for drivers, safety training for drivers and insurance/ liability coverage and the vast majority feel they should apply to all three services. Nearly a majority feel there should be regulation in each area.
- Residents are less inclined to feel that the same regulations should apply to Uber, however a majority agree to most areas mentioned. Residents are most split when it comes to regulating fares.



25. Which of the following regulations should apply to the following types of transportation services? Base: All respondents (n=1004)

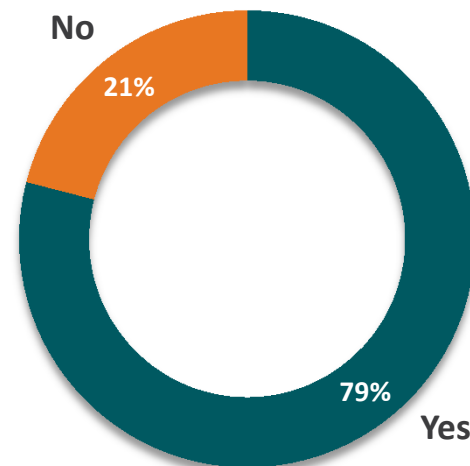
ATTITUDES AND OPINIONS

Awareness That UberX, XL and Select Services Are Not Regulated

- At eight in ten, the vast majority of residents claim to be aware that UberX, UberXL and UberSelect are not regulated in the City of Toronto.

As you may know taxi and limousine services are regulated by the City of Toronto. This means that these services require a license to operate and they must meet certain criteria as directed by the City of Toronto, including driver training, vehicle safety inspections twice a year, criminal record checks and commercial insurance. Further, the fare charged by taxi services is determined by the City of Toronto.

Currently, UberX, UberXL and UberSelect are not regulated by the City of Toronto. Uber conducts its own driver training, vehicle safety checks, criminal background checks and insurance requirements, which the city does not currently review or check to ensure compliance. The fare charged by Uber is not determined by the City and can fluctuate based on the discretion of the company or due to higher demand (i.e. surge pricing).



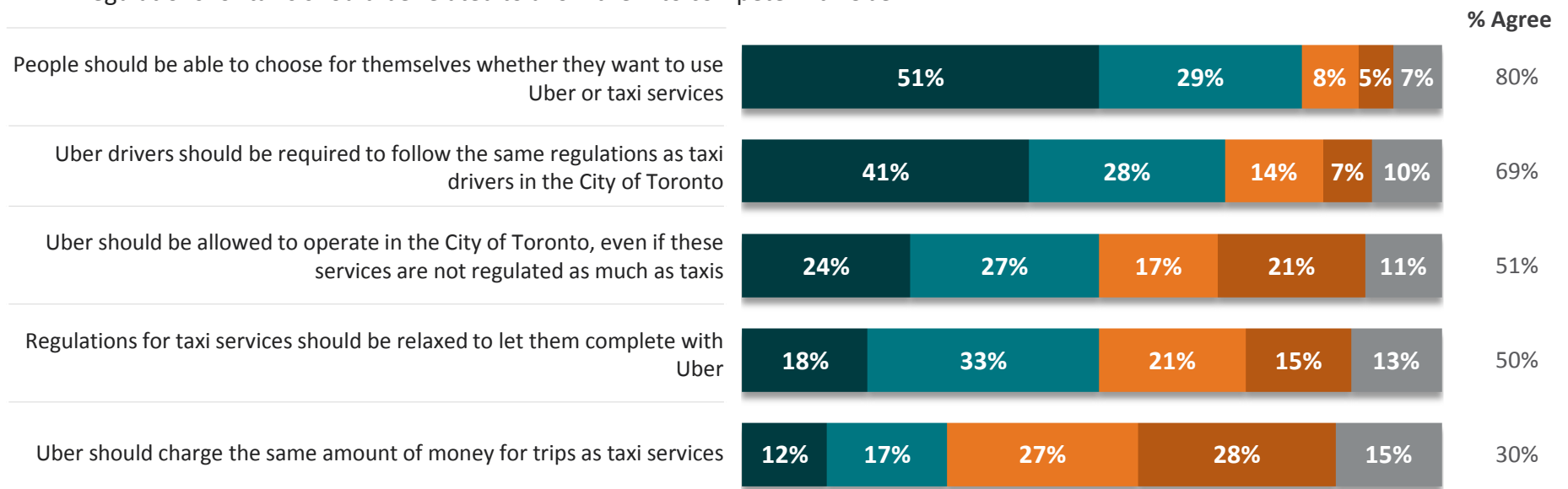
22. Before today, were you aware that Uber is not regulated the same way as taxis?

Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Regulation

- At eight in ten, residents are most likely to agree that people should be able to choose for themselves whether they want to use Uber or taxi services. Agreement is also relatively high that Uber drivers should be required to follow the same regulations as taxi drivers, while residents are split on whether Uber should be allowed to operate even if their services are not as regulated as taxis or if regulations for taxis should be related to allow them to compete with Uber.



23. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so.

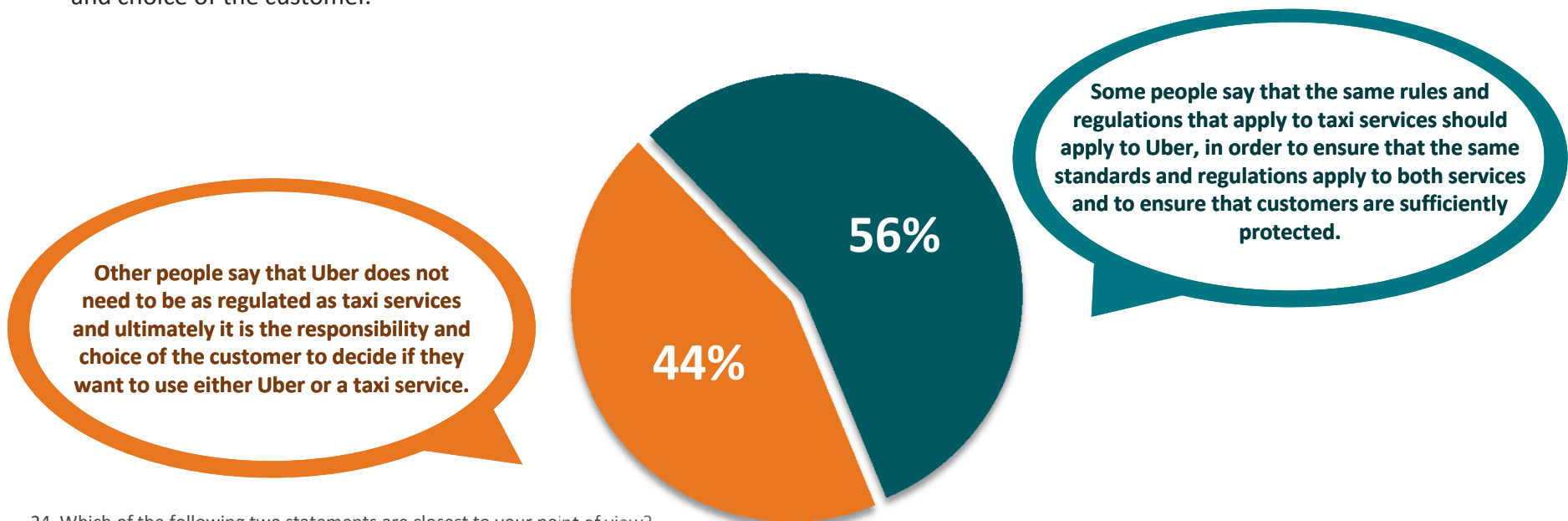
Base: All respondents (n=1004)

■ Strongly agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Regulation

- Residents are split in terms of their opinions towards regulation of Uber with just over half who agree that the same rules and regulations that apply to taxi services should apply to Uber in order to ensure the same standards apply and to ensure customers are protected, while just closer to four in ten feel that Uber does not need to be as regulated and ultimately it is the responsibility and choice of the customer.



24. Which of the following two statements are closest to your point of view?

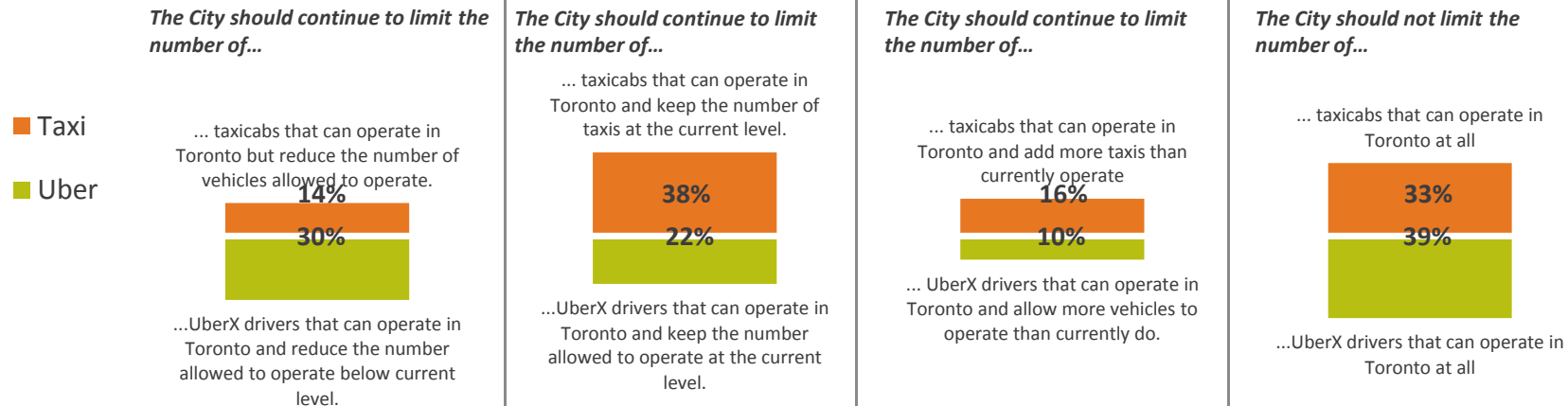
Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Number Uber Drivers and Taxi Cabs

- Residents are split in terms of whether the city should limit the number of Uber drivers or taxi cabs. The majority feel the City should play a role in each (61% and 67% respectively) however attitudes are divided.
- Three in ten feel the City should decrease the number of Uber drivers (30%) while slightly fewer think it should be kept steady (20%); comparatively, four in ten (39%) feel it shouldn't be regulated at all.
- In terms of taxis, at nearly four in ten the largest proportion feel the number of taxis should be keep at the current level, while fewer than two in ten feel they should be increased or decreased and one third think it should not be regulated at all.

The City of Toronto limits the number of taxicabs allowed to operate and currently 5,000 taxicabs are allowed to operate in Toronto. This is partly in an effort to reduce traffic impacts of taxicabs. Services such as Uber do not fall under these regulations and also contribute to the number of vehicles on the road and by the end of this year, it is estimated that 15,000 UberX drivers will be available in Ontario, mostly in Toronto.



27. Considering this information, which of the following is closest to your point of view regarding taxis? Base: All respondents (n=1004)



SATISFACTION WITH TRANSPORTATION SERVICES

GAME CHANGERS



SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Services:

- Satisfaction with Uber (65% '8-10' on 10-point scale) and limos (61%) is particularly high; in comparison less than half as many are satisfied with taxi service (29%) and four in ten (38%) are satisfied with public transportation.
- When Uber users are asked to explain their level of satisfaction, the vast majority (82%) provide a positive comment of which the most common mentions are for the cheaper cost, the ease of use or a positive driver experience. Few (6%) provide a negative comment of which the limited mentions are for unsafe driving.
- Among taxi users, the majority (62%) cite something positive of which the highest mentions are for a good previous experience, the ease of use, reliability or a positive experience with drivers. The high proportion of positive comments helps highlight that despite the fact taxi users are not as satisfied as Uber or limo users they are still generally positive. Nearly one third (32%) say something negative of which the most common comments are about high fares or a poor experience with a taxi driver.
- When asked to rate the importance of different factors in vehicle-for-hire services, Toronto residents are most likely to prioritize personal safety (83% '8-10' on 10-point scale), of which more than half feel it is 'very important' (54% 'Very Important- 10'), followed closely by safe driving behaviour (82%). Cost (78%) is considered the next most important factor along with knowledge of the area (76%) and notably, adequate insurance/ liability coverage where nearly four in ten feel it is very important (37% '10'). Use of technology and mobile apps (38%) is considered the least important factor.

SATISFACTION WITH TRANSPORTATION SERVICES

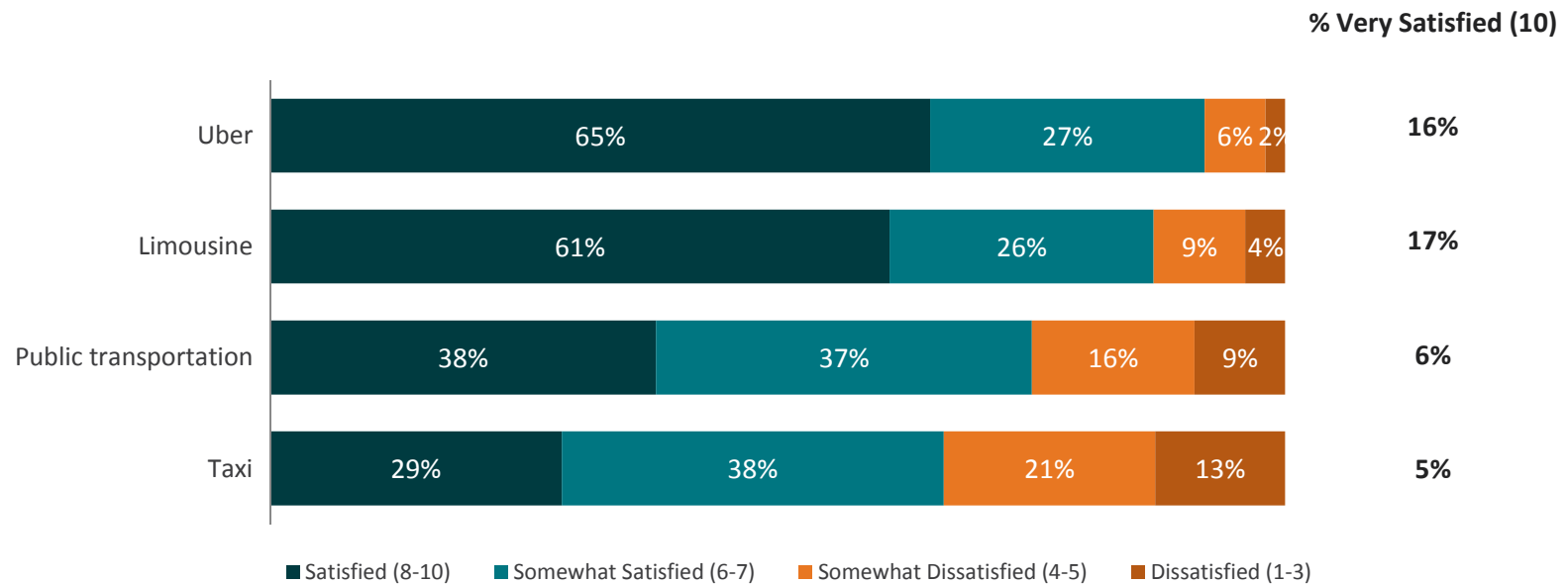
Satisfaction with Services (cont'd):

- In terms of satisfaction with specific areas of service, limo services achieve the highest scores of the three vehicle-for-hire services across every area except cost of services (52%) and use of technology (48%).
- Uber performs well across most areas of service and achieves its highest scores for use of technology (76% '8-10' on 10-point scale), ease of payment (75%), cost of trip (74%) and cleanliness of vehicle (74%). Lowest scores are given for having adequate insurance (55%).
- Taxis achieve lower scores across the board but score relatively well on personal safety (64%), knowledge (58%), adequate insurance (57%) and safe driving (57%). Taxi services perform more poorly on cost of service (36%), use of technology (33%) and to a lesser extent courteousness of drivers (49%).

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Transportation Services

- At two-thirds, satisfaction among Uber users is the highest of all transportation services, while limo services is close behind at six in ten. Four in ten transit users are satisfied with the service, while three in ten taxi users are satisfied.

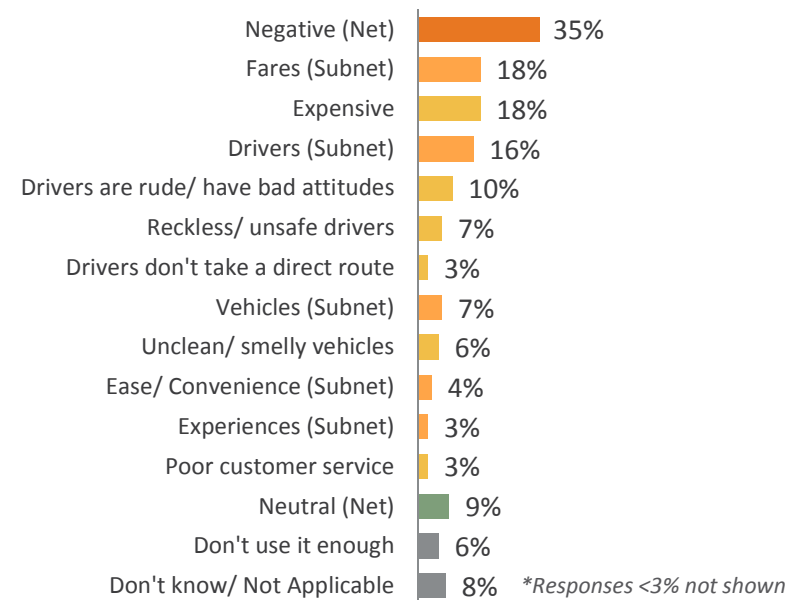


13. Overall, how satisfied would you say that you are with the following types of transportation using a scale of 1 to 10 where 1 means very unsatisfied and 10 means very satisfied? Base: Have used service (varies)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Taxi Services

- When asked to explain their satisfaction with taxi services, the majority of users cite something positive of which the highest mentions are for a good previous experience, the ease of use, reliability or a positive experience with drivers.
- Nearly one third provide a negative comment of which the most common responses are high fares or poor experiences with drivers.



14. Why would you say that you are [if mention 1 to 4 enter 'unsatisfied' if mention 5 enter 'neither unsatisfied or satisfied' if mention 6 to 10 enter 'satisfied'] with your taxi experience overall? Base: Have used Taxi (n=585)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Taxi Services



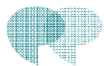
Allows me to get from point A to B faster than public transport when driving is not an option."



Service is SO variable! Some drivers are very courteous and helpful, others are not. Cleanliness and newness of cab varies greatly too."



It gets me from point a to point b when needed. Pricey for me though so I don't often do it."



Generally drivers are good, cars are in fair repair and I don't find the fares unreasonable."



Drivers always know where they are going, even though the vehicles may be rundown."



It is fast and convenient."



Taxi drivers have a lot of crazy tricks like (card machine not working, only accept cash) or they refuse you when they know the destination, or their cars are filthy.... I don't take taxi anymore after I have tried UBER..



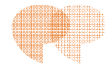
Taxis can be rude, unclean and VERY expensive."



Drivers are rude and unreliable. They do not obey the rules of the road and do not care how their action affect the flow of traffic or what consequences to has on other drivers."



Stopped using taxis on a call up basis several years ago after so many unreasonable response times and failing to show."

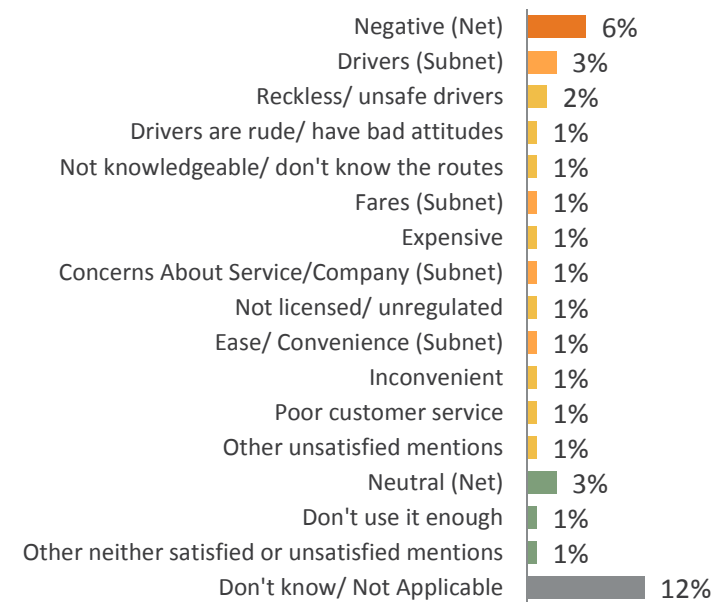
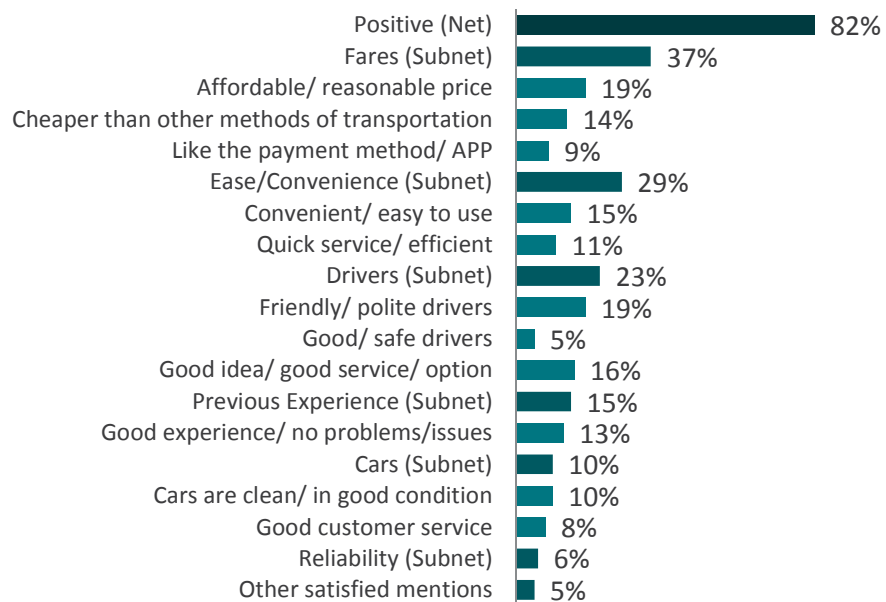


I find taxis are hit or miss. Sometimes I have a great driver, clean car and a good experience. Other times not so much. It bothers me that so much of the cost goes to the plate owner, not the driver."

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Uber Services

- When asked to explain their satisfaction with Uber services, the vast majority of users provide a positive comment of which the most common mentions are for a the affordable/ cheaper cost, the ease of use or a positive driver experience.
- Few provide a negative comment of which the most common are for unsafe driving.



15. Why would you say that you are [if mention 1 to 4 enter 'unsatisfied' if mention 5 enter 'neither unsatisfied or satisfied' if mention 6 to 10 enter 'satisfied'] with your Uber experience overall? Base: Have used Uber (n=210) *Responses <5% not shown

SATISFACTION WITH TRANSPORTATION SERVICES

Ipsos Reid

Reasons for Satisfaction With Uber Services



Convenient, ease of use, flexibility of drivers, can take short trips (unlike taxis), ease of payment, no need to tip."



I like the ability to request a vehicle through the Uber app, which also shows me the driver's rating. It is also more affordable than taxis."



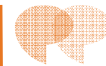
It is easy to use. I always receive excellent customer service."



Fares are sometimes half of what a taxi cost. the cars are clean."



When I order I car, I know where it is, I know who the driver is, I know when it will arrive. I can pay seamlessly. The cars are owner-operated and impeccably clean and run by people who WANT to be driving, not who HAVE to because it's their job."



Unregulated and increase fare at any time."



Too early to tell...apart from price not sure what the quality of the cars/service will be."



Because there is safety issues."



It's hit and miss, sometimes you get a good driver sometimes not really."



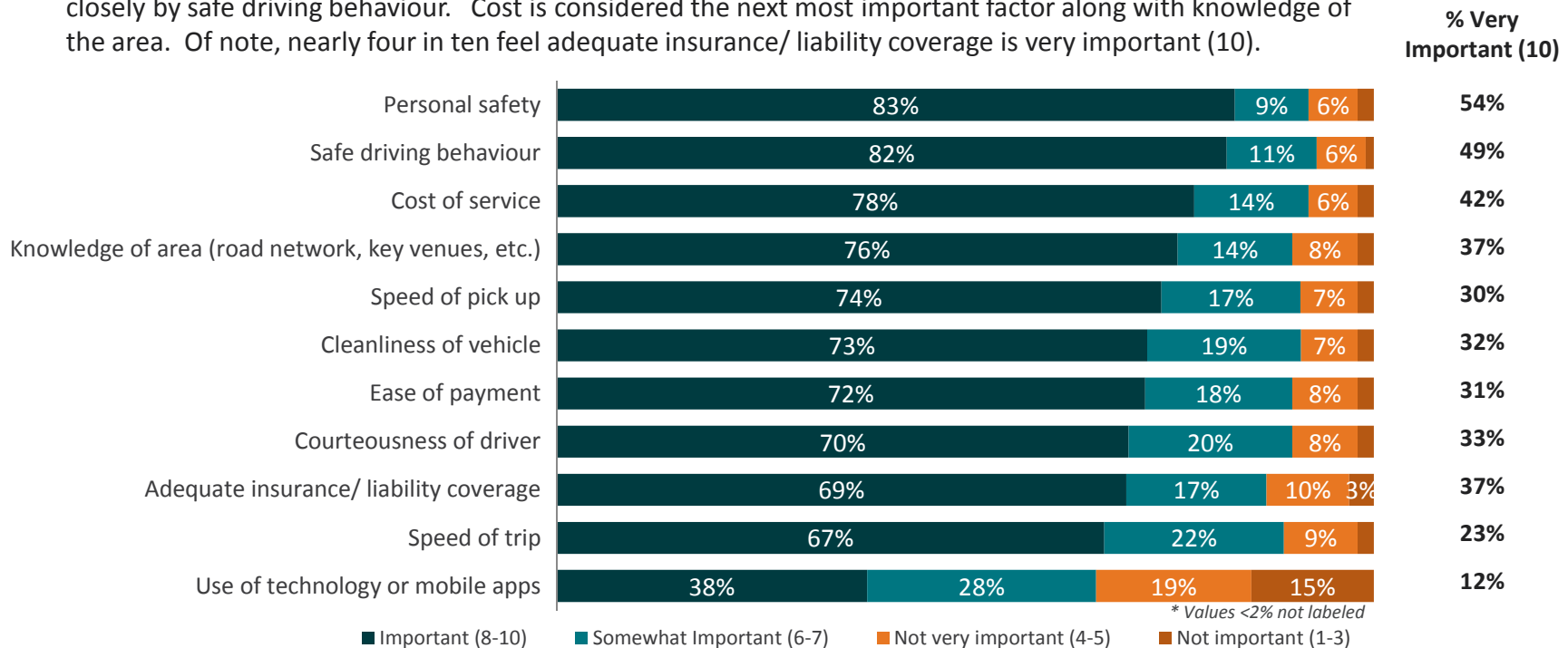
On time but no insurance."

SATISFACTION WITH TRANSPORTATION SERVICES

Ipsos Reid

Importance of Factors in Vehicle For Hire Services

- Residents feel personal safety is the most important factor when it comes to vehicle for hire services, followed closely by safe driving behaviour. Cost is considered the next most important factor along with knowledge of the area. Of note, nearly four in ten feel adequate insurance/ liability coverage is very important (10).

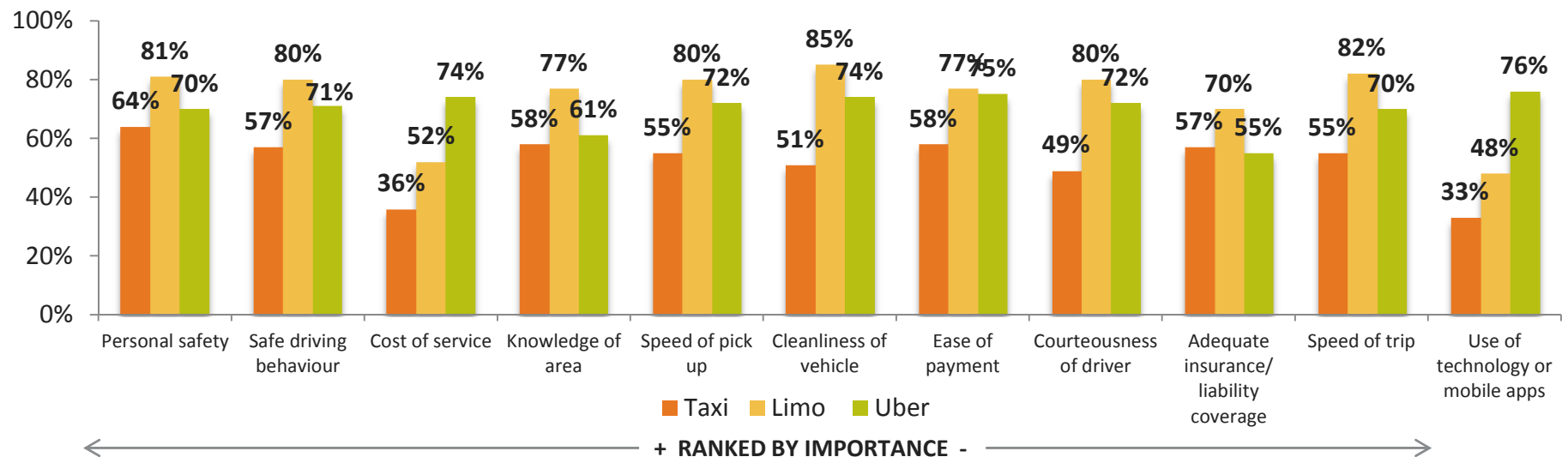


16. When you use a service such as a taxi, limo or Uber, how important are each of the following to you using a scale of 1 to 10 where 1 means not important at all and 10 means very important? Base: All respondents (n=1004)

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Transportation Services

- Limos achieve the highest scores of the three services across every area except for cost of service and use of technology.
- Uber performs well across most areas and achieves its highest scores for use of technology, ease of payment, cost of trip and cleanliness of vehicle, while lowest scores are given for having adequate insurance.
- Taxis achieve the lowest scores of the three transportation services and score relatively well on personal safety, knowledge, adequate insurance and safe driving, but perform more poorly on cost of service, use of technology and to a lesser extent courteousness of drivers and cleanliness of cars.

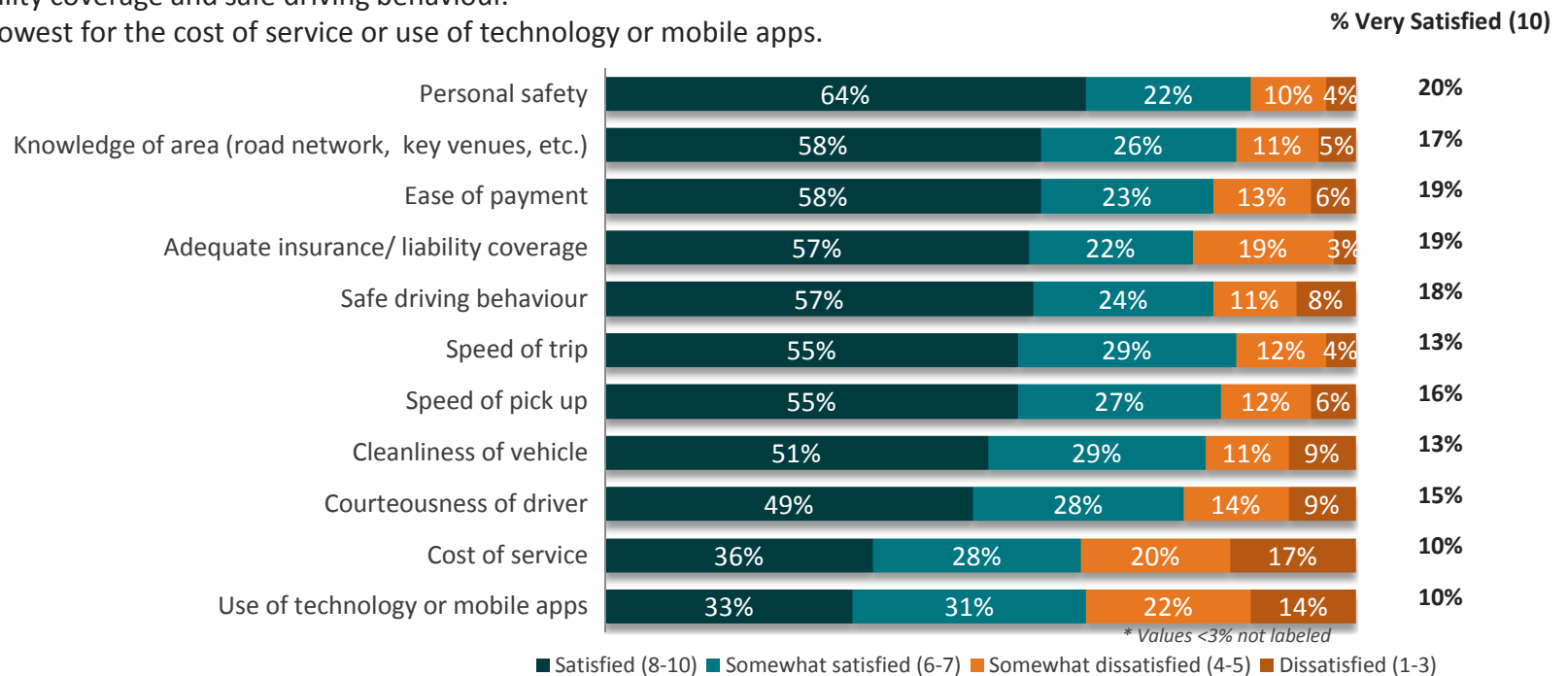


17/18/19. Thinking about when you use a taxi service/limo service/Uber, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied? Base: Have used a service (n=varies)

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Taxi Services

- Among taxi users, satisfaction is highest for personal safety followed by knowledge of the area, ease of payment, adequate insurance/ liability coverage and safe driving behaviour.
- Satisfaction is lowest for the cost of service or use of technology or mobile apps.



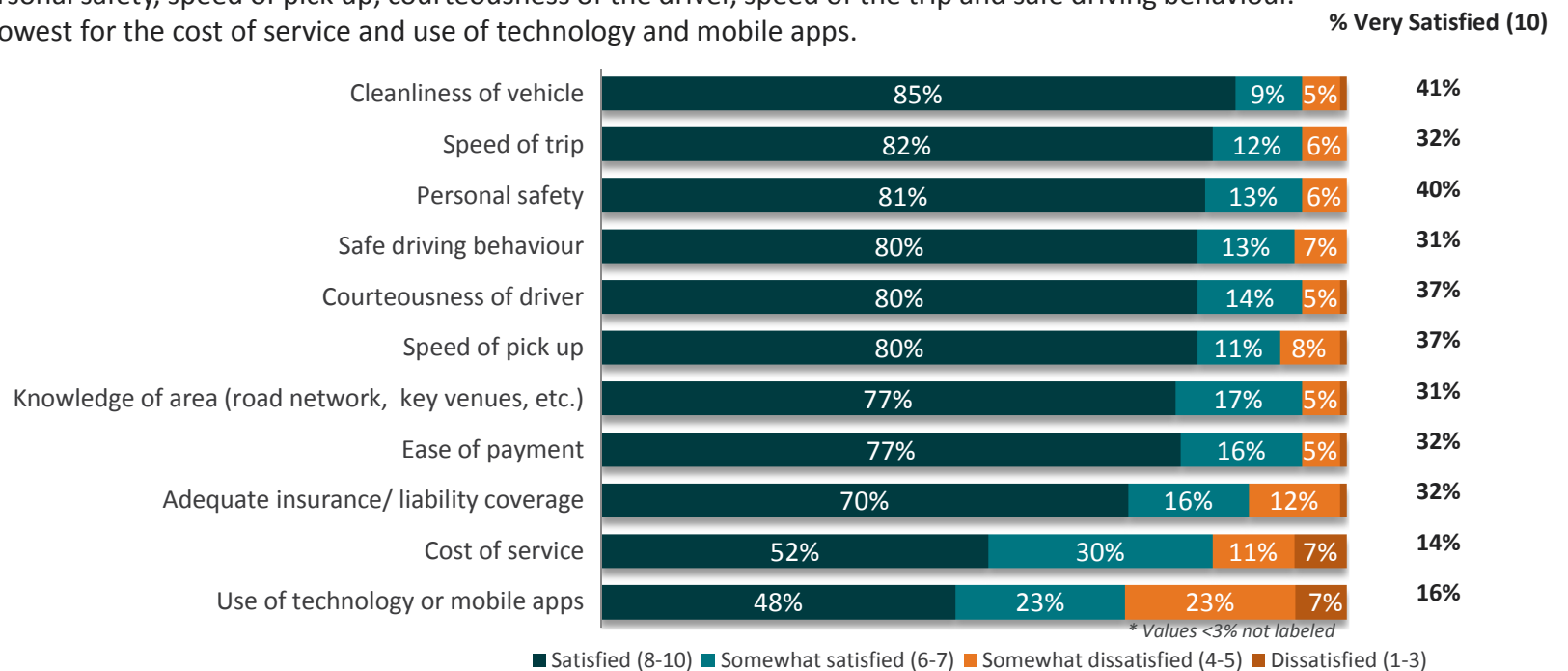
17. Thinking about when you use a Taxi service, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied? Base: Have used Taxi (n=585)

SATISFACTION WITH TRANSPORTATION SERVICES

Ipsos Reid

Satisfaction with Limo Services

- Nearly a majority of limo users are satisfied with every area of service. Satisfaction is highest for the cleanliness of the vehicle, followed by personal safety, speed of pick up, courteousness of the driver, speed of the trip and safe driving behaviour.
- Satisfaction is lowest for the cost of service and use of technology and mobile apps.

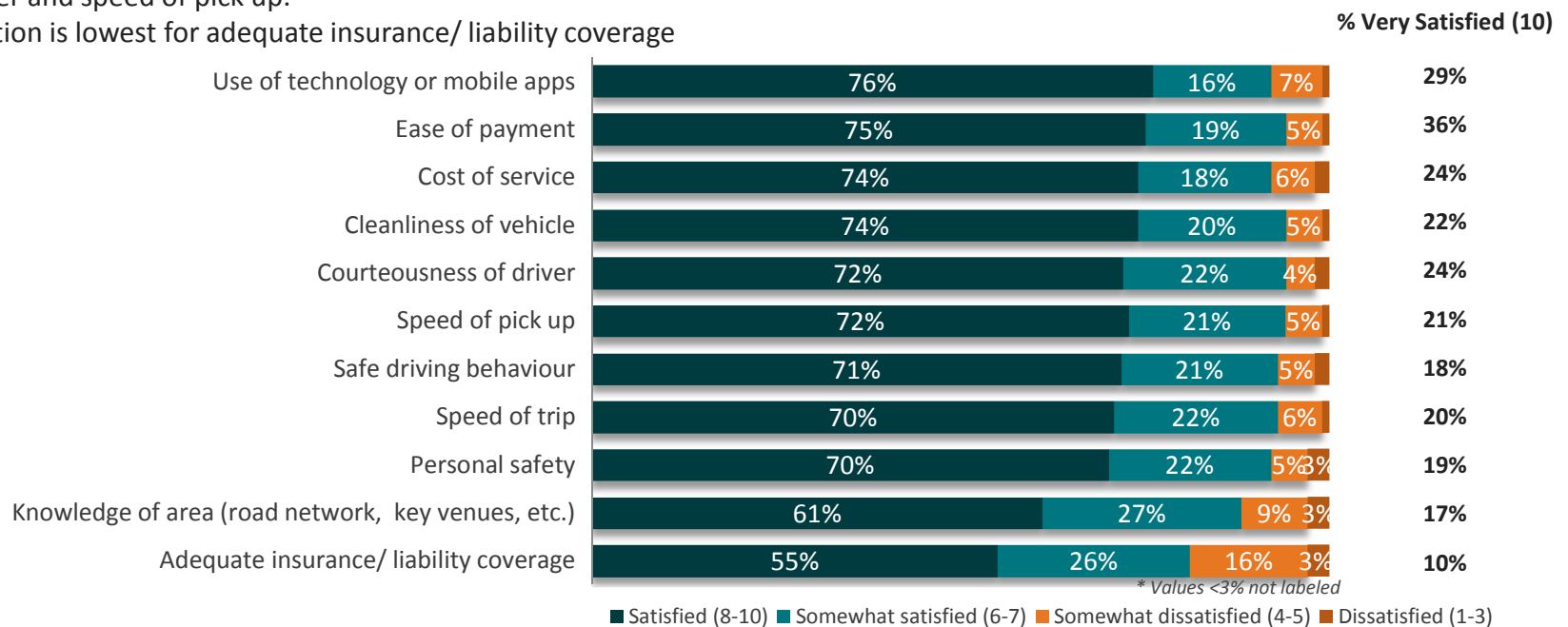


18. Thinking about when you use a Limo service, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied? Base: Have used Limousine (n=178)

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Uber Services

- A majority of Uber users are satisfied with every area of service and are by far most likely to be satisfied with the ease of payment. Satisfaction is also very high for the use of technology or mobile apps, the cost of service, cleanliness of vehicle, courteousness of the driver and speed of pick up.
- Satisfaction is lowest for adequate insurance/ liability coverage

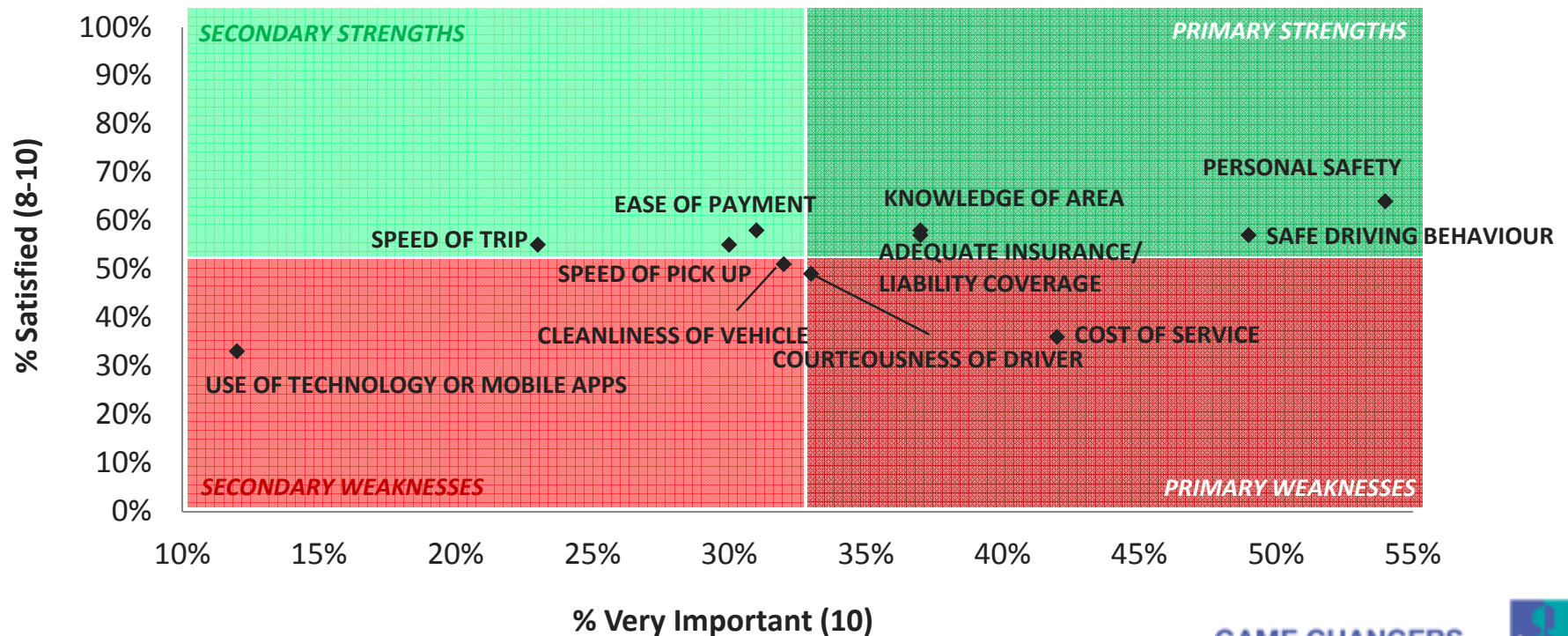


19. Thinking about when you use Uber, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied? Base: Have used Uber (n=210)

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction vs. Importance (Taxi)

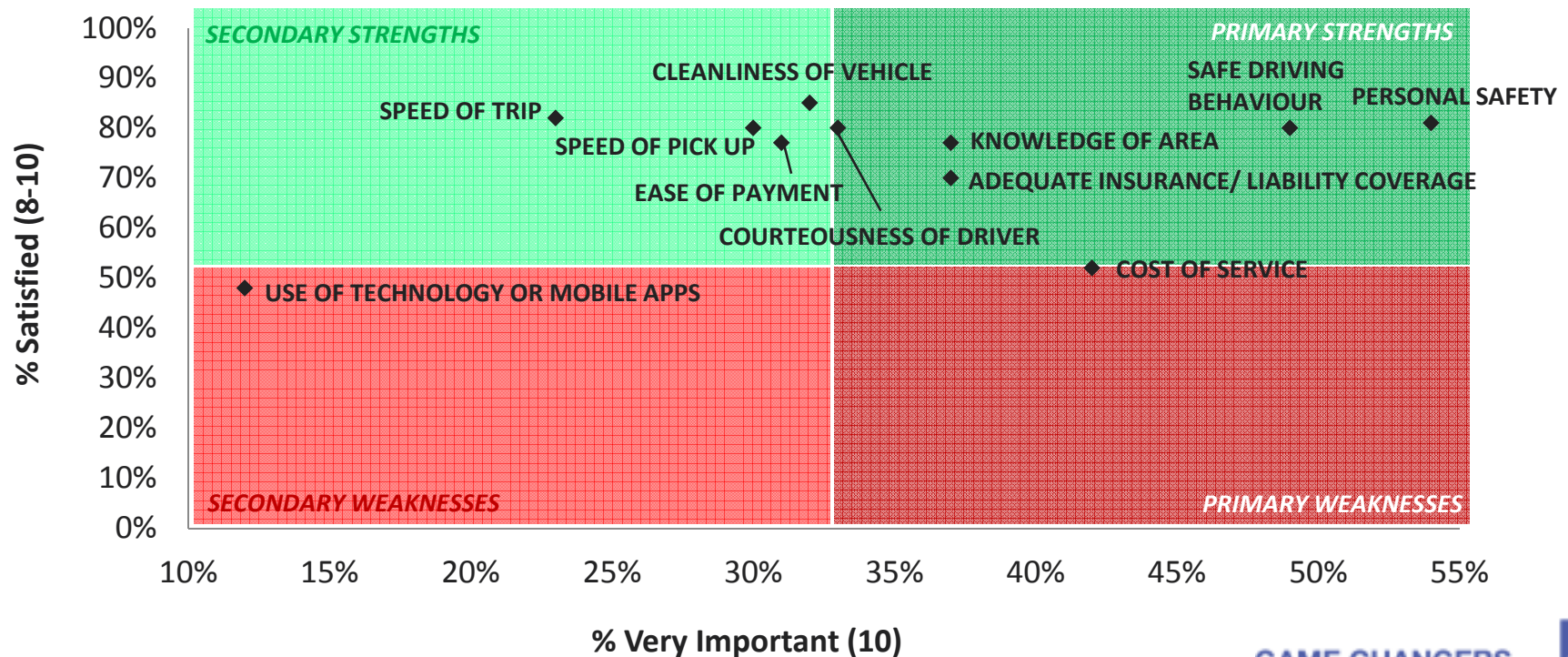
- Primary strengths of taxis are the personal safety, safe driving behaviour and to a lesser extent knowledge of the area and having adequate insurance.
- Primary weaknesses are cost of service and courteousness of the driver.



SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction vs. Importance (Limo)

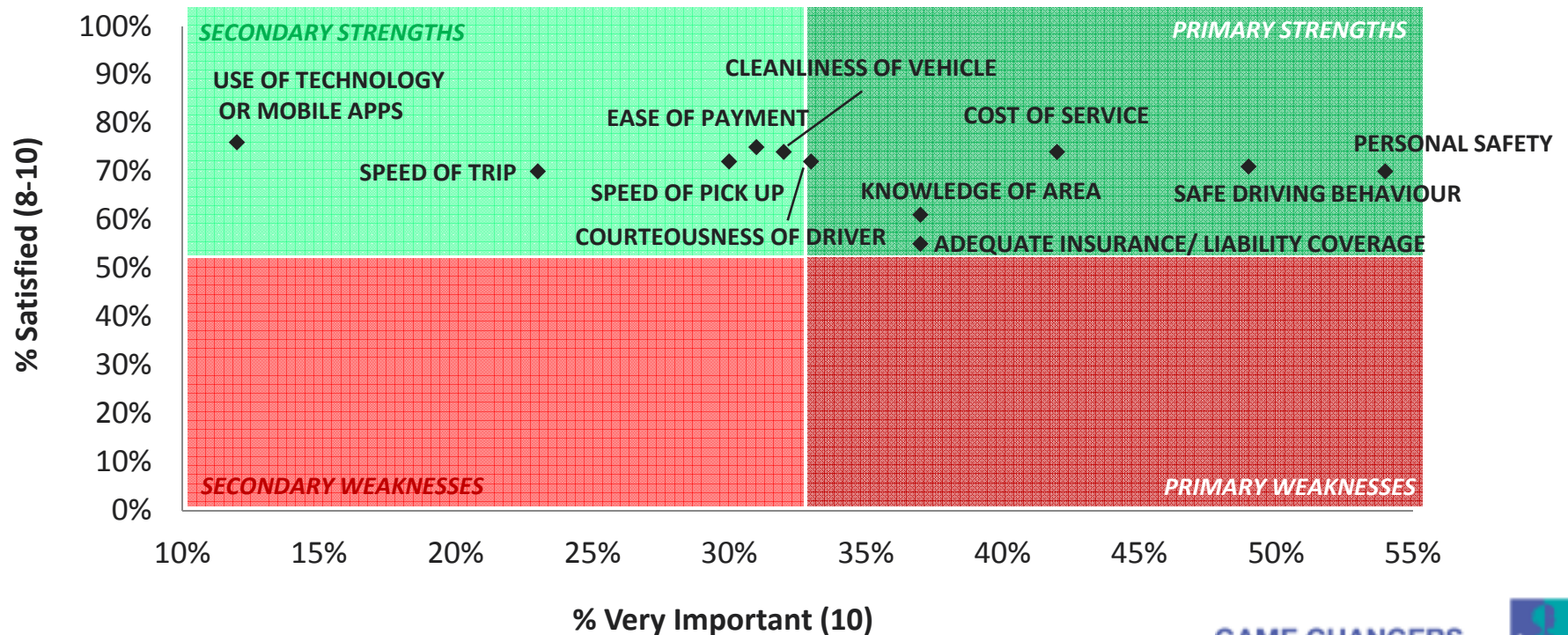
- The primary strengths of limos are the personal safety, safe driving behaviour, knowledge of the area, having adequate insurance and the courteousness of the driver
- Relatively speaking, cost of service is the primary weakness of limos, while the use of technology/ mobile apps is a secondary weakness.



SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction vs. Importance (Uber)

- The primary strengths of Uber are the personal safety, safe driving behaviour and cost of service. The service also performs relatively well on courteousness of the driver and knowledge of the area.
- There are no obvious primary weaknesses, however relatively speaking having adequate insurance/ liability is the lowest scoring area.





ATTITUDES AND OPINIONS

ATTITUDES AND OPINIONS

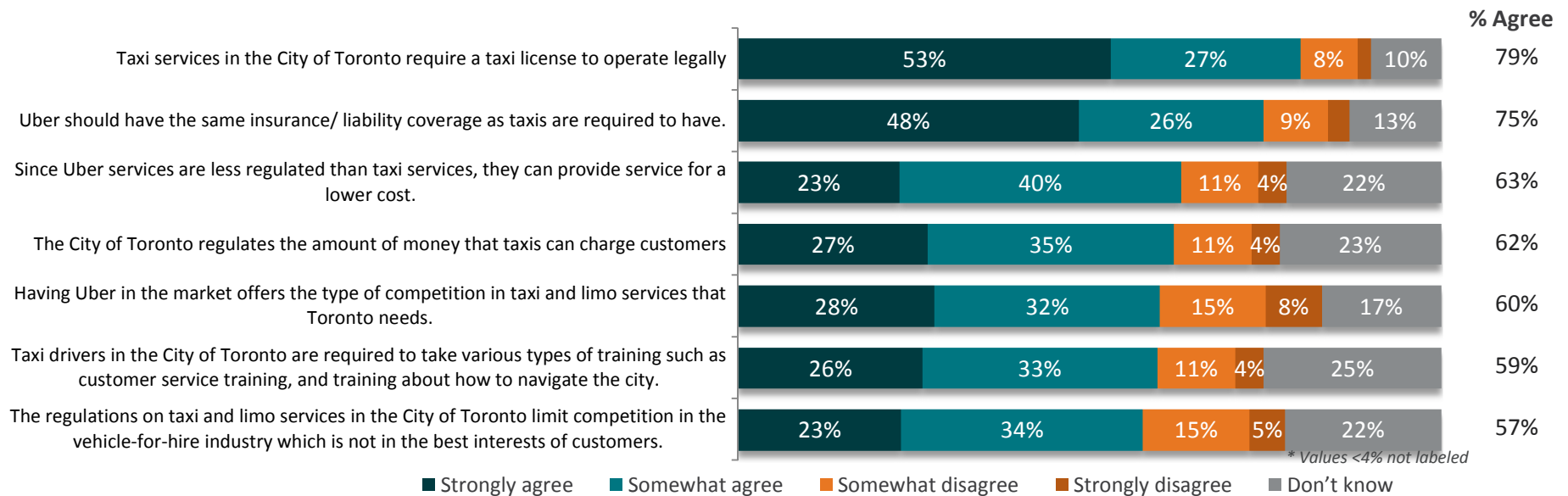
Attitudes towards Taxis and Uber:

- At eight in ten, residents are most likely to agree that taxi services require a taxi license to operate legally (79%) followed by three quarters who agree that Uber should have the same insurance/ liability coverage as taxis are required to have (75%).
- At six in ten agreement is also relatively high that because Uber services are less regulated they can provide service for a lower cost (63%), that the City regulates the amount of money that taxis can charge (62%), that having Uber offers the type of competition that taxis/limos need (60%) and that taxi drivers are required to take various types of training (59%).
- Agreement is lowest that the City regulates the amount of money that Uber can charge (27%), that Uber drivers are required to take various types of training (38%) and that Uber require a taxi license to operate legally (39%). *Of note, around one-quarter of residents don't know how to respond to each statement, highlighting a relative lack of knowledge regarding the vehicle-for-hire industry and Uber in particular.*
- Among Uber users, more than eight in ten agree that the cheaper cost (84%) and ability to order a vehicle through the mobile app (83%) are the main reasons they use the service. Three quarters agree that the overall quality of the app (77%), the ability to pay through the app (75%), track the vehicle through the app (75%) and the quality of service (74%) are the main reasons they use the service. Two-thirds of Uber users report having switched from using taxis (67%).
- Just over half of residents would be more likely (very/ somewhat) to use a taxi if the base rate decreased to \$3 (55%), while slightly fewer would do so if it decreased to \$3.50 (48%). Only one quarter (24%) are more likely to use a taxicab if the base rate decreased to \$4.

ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Services

- At eight in ten, residents are most likely to agree that taxi services require a taxi license to operate legally while three quarters agree that Uber should have the same insurance/ liability coverage as taxis are required to have. At six in ten agreement is also relatively high that since Uber services are less regulated they can provide service for a lower cost, that the City regulates the amount of money that taxis can charge, that having Uber offers the type of competition that taxis/limos need and that taxi drivers are required to take various types of training (i.e. customer service, how to navigate).
- Of note, around two in ten residents don't know in each case.

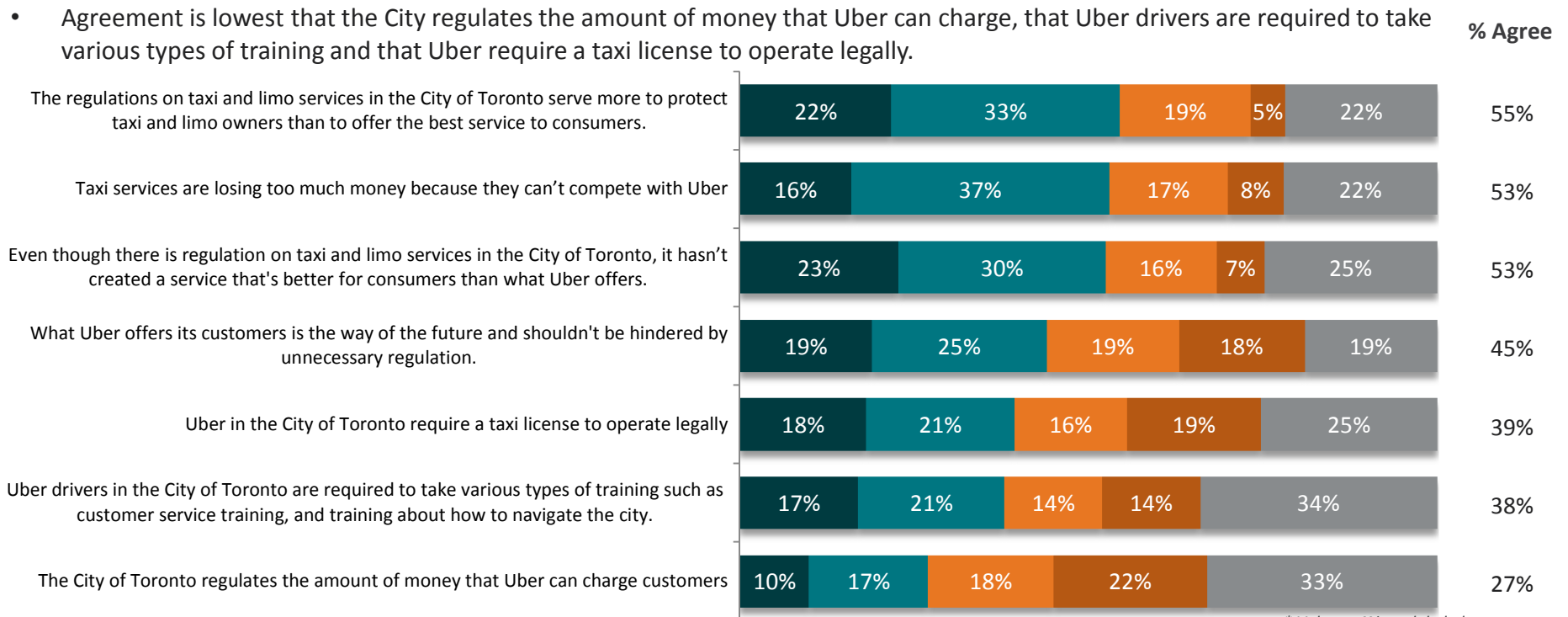


21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Ipsos Reid

Attitudes Towards Uber and Taxi Services



21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so.

Base: All respondents (n=1004)

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Strongly agree Somewhat agree Somewhat disagree Strongly disagree Don't know

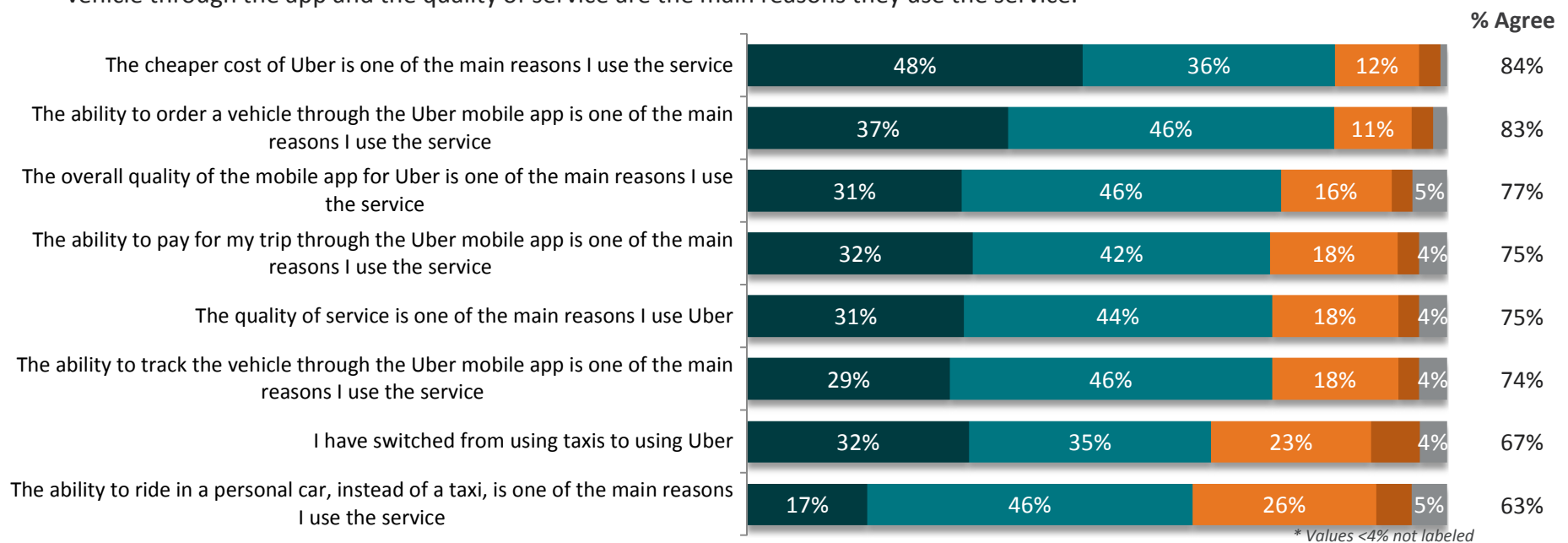
GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Uber (Among Users)

- More than eight in ten Uber users agree that the cheaper cost and ability to order a vehicle through the mobile app are the main reasons they use the service. Three quarters agree that the overall quality of the app, the ability to pay through the app, track the vehicle through the app and the quality of service are the main reasons they use the service.



21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so.

Base: All respondents (n=210)
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Strongly agree Somewhat agree Somewhat disagree Strongly disagree Don't know

GAME CHANGERS

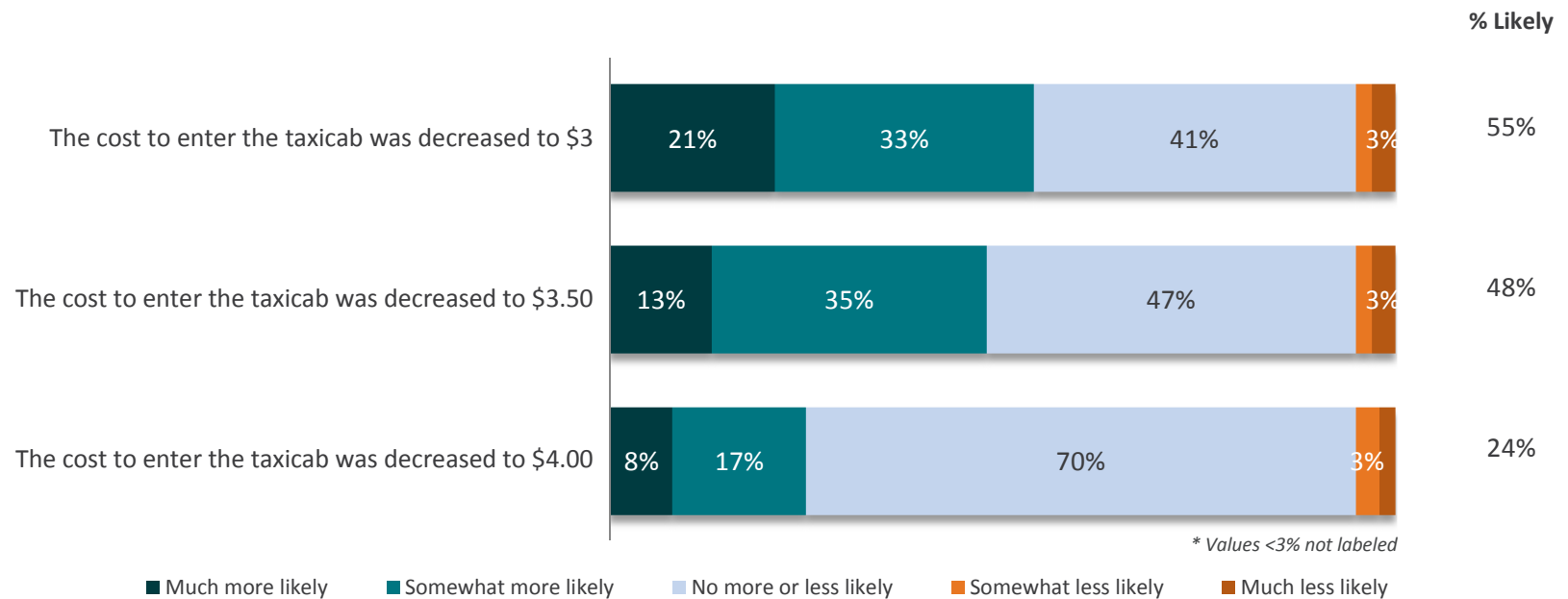


SATISFACTION WITH TRANSPORTATION SERVICES

Ipsos Reid

Impact on Taxi Usage Assuming Decline in Base Rate

- Just over half of residents would be more likely to use a taxi if the base rate decreased to \$3, while slightly fewer would do so if it decreased to \$3.50. Only one quarter are more likely to use a taxicab if the base rate decreased to \$4.



20. The current cost to enter a taxicab is \$4.25 and increases with the time and distance of the trip. How much more likely would you be to take a taxi if....

Base: Split sample, one-third of respondents asked each option (approx .335 per statement)



Ipsos Reid

DEMOGRAPHICS

GAME CHANGERS



DEMOGRAPHICS

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Gender	
Male	47%
Female	53%
Age	
18 - 24	11%
25 - 34	19%
35 - 44	18%
45 - 54	19%
55 - 64	14%
65+	18%
Education	
Grade school or some high school	2%
Complete high school	13%
Complete technical or trade school/Community college	15%
Some community college or university, but did not finish	15%
Complete university degree, such as a Bachelor's	41%
Post-graduate degree, such as a Master's or Ph.D.	14%
Employment Status	
Working full-time	45%
Working part-time	8%
Self-employed	9%
Currently unemployed	5%
Student	8%
Retired	20%
Homemaker	4%
Other	1%

Income	
Under \$20,000	8%
\$20,000 to under \$40,000	13%
\$40,000 to under \$60,000	19%
\$60,000 to under \$80,000	18%
\$80,000 to under \$100,000	15%
\$100,000 to under \$120,000	11%
\$120,000 to under \$140,000	5%
\$140,000 or more	11%
Household Number	
One	24%
Two	36%
Three	18%
Four	15%
Five or more	7%
Born in Canada	
Yes	72%
No	28%
City of Toronto Residency	
Less than 1 year	1%
1 to just under 5 years	6%
5 to just under 10 years	9%
10 to just under 20 years	17%
20 years or more	68%



APPENDIX- KEY SUBGROUPS

APPENDIX- KEY SUBGROUPS

NOTES ON SUBGROUP COMPARISONS

- Statistically significant differences between subgroups are identified with letters (A, B, C...). The percentage with the letter beside it is higher than the column denoted by the letter by a statistically significant margin.
- Subgroups with sample sizes under n=100 are identified with * and are considered small, sample sizes under n=30 are identified with ** and are considered very small and should be interpreted with caution.

APPENDIX- KEY SUBGROUPS

Summary of Differences by Key Subgroup

Age

- Younger residents are more familiar with Uber, while older residents are more familiar with limos.
- Residents 18-34 are most likely to use public transit, taxis or Uber and to do so more frequently than older residents. Residents over 55 are more likely to have taken a limo in the past year.
- Among those who haven't taken a taxi in the past year, 35-54 year olds are more likely to do so in the future, while those 55+ are less likely mostly because they have other preferred means/ own a car. Older residents are also less likely to take Uber in the future and to say its because they prefer licensed/ insured taxis or don't have a smartphone.
- Toronto residents over 55 years old are more likely to support regulation for all vehicle-for-hire services generally and in terms of regulation on taxi, limo and Uber services specifically. They are most likely to favour rules and regulations that protect passenger safety- mainly criminal record checks for drivers, safety training for drivers, protection in case of bad/unsafe driving, adequate insurance/ liability coverage or cameras in vehicles.
- Those over 55 are most aware that UberX, XL or Select are not regulated in the City of Toronto.
- Older residents are more likely to feel that the same rules and regulations that apply to taxi services should apply to Uber, while 18-34 year olds specifically are more likely to agree that Uber should be allowed to operate even if it doesn't have as much regulation as taxis or that regulations on taxis should be relaxed to allow them to compete with Uber.

APPENDIX- KEY SUBGROUPS

Summary of Differences by Key Subgroup

Age (cont'd)

- Toronto residents over 55 years old are more likely to think that the City should limit the number of Uber drivers allowed to operate and lower it from current levels, while those 18-34 are more likely to think it should be kept at current levels.
- Older residents are generally more satisfied with public transportation and taxi services. They provide higher satisfaction rating for taxis (and limos) across all aspects of service and are more likely to mention having had a positive experience with taxis/ taxi drivers in the past. Residents 18-34 are more negative towards taxi services and in terms of fares specifically.
- Older residents are also more likely to feel every aspect of vehicle-for-hire services is important to them.
- Residents over 55 years old are more likely to know that taxis require licenses to operate and that the City regulates the amount a taxi can charge. They are also more likely to agree that Uber should have the same insurance/ liability coverage as taxi services.
- Younger residents are more likely to feel that regulations on taxi and limo services haven't created a better service than what Uber offers and that Uber is the way of the future and shouldn't be hindered by unnecessary regulation.
- Generally speaking, younger residents are more likely to take taxi services if the base rate is reduced (regardless of the decrease).

APPENDIX- KEY SUBGROUPS

Summary of Differences by Key Subgroup

Gender

- Females residents use transit more frequently than males, while male residents are more likely to use UberBlack, XL, Select or Pool services.
- Female Uber users are more likely to report using the service more often than they did a year ago and to cite cost as the main reason they use Uber. Males place greater importance on being able to ride in a personal vehicle.
- Male Uber users are more likely to be taking taxis the same amount as they did before using Uber.
- Female residents are more likely to be supportive of regulation for the vehicle-for-hire industry overall and in terms of regulation for taxi, limo and Uber services specifically.
- Male residents are more likely to think the City shouldn't regulate the number of taxis or Uber drivers at all, while female residents are more likely to think the number of taxis should be kept at its current level and that the City should limit Uber driver and increase it above current levels.
- Female residents are generally more positive towards taxi service and specifically in terms of personal safety. They are also more critical of the cost to use taxis.
- Male residents are more likely to know that the City regulates the amount taxis can charge and to feel that current regulations on taxis and limos limit competition in the industry.

APPENDIX- KEY SUBGROUPS

Summary of Differences by Key Subgroup

Region

- Familiarity with taxi services is higher among residents of the old City of Toronto and York.
- Usage of taxi and limo services is higher among those who reside in the old City of Toronto.
- York residents are more likely to support regulation in the vehicle-for-hire industry that requires criminal background checks for drivers and allows for protection incase of bad/ unsafe service and to feel that the courteousness of drivers is a more important factor in vehicle-for-hire services.

APPENDIX- KEY SUBGROUPS

Summary of Differences by Key Subgroup

Taxi, UberX and UberTaxi Users

- All three user groups are more likely to be familiar with taxi, limo and Uber services than the general population and to have taken all forms and transit in the past year.
- They are also more likely to agree that Uber should be allowed to operate even if it isn't as regulated as taxi services and that regulations on taxi services should be relaxed to allow them to compete with Uber. Agreement is also higher that current regulations do more to protect the taxi and limo industry, that regulations haven't created a better service than what Uber offers and that Uber is the way of the future and shouldn't be hindered with unnecessary regulation.
- Taxi and Uber users are also more likely to falsely believe that Uber requires a license to operate and that the City regulates driver safety training and what Uber can charge.
- All groups are also more likely to think that the city should continue to limit the number of taxis and increase it from current levels.
- Generally speaking, Taxi and Uber users are likely than the general population to take taxi services if the base rate was decreased.

APPENDIX- KEY SUBGROUPS

Summary of Differences by Key Subgroup

Taxi Users

- Taxi users are generally less likely to support regulation on taxi services, but more supportive than the general population of regulating driver income. They are also more likely to feel that taxis are losing too much money because of Uber and that Uber should have to charge the same as taxi services.
- Regular taxi users (at least once a week) are more likely to be satisfied with taxis than less frequent users.
- Among those who currently don't use Uber, taxi users are more likely than average to be receptive to using it in the future.

UberTaxi Users

- Familiarity with specific Uber services is significantly higher among UberTaxi users.
- UberTaxi users are more likely to report using taxis more often than compared to before they started using Uber.
- UberTaxi users are also less likely to support regulation of any vehicle-for-hire services but more supportive than the general population of regulating driver income. They are also more likely to agree that current regulation on taxi and limo services limit competition in the industry and that Uber should have to charge the same as taxi services.
- UberTaxi users are less likely to feel adequate insurance/ liability is an important factor in vehicle-for-hire service.

APPENDIX- KEY SUBGROUPS

Summary of Differences by Key Subgroup

UberX Users

- Familiarity with specific Uber services is significantly higher among UberX users.
- UberX users are more likely to report using taxis more often than compared to before they started using Uber.
- Generally speaking, UberX users are less likely to support regulation of any vehicle-for-hire services and Uber in particular except when it comes to driver income where they are inline with the general population. They are also more likely to agree that Uber offers the competition in the vehicle-for-hire industry that Toronto needs and that current regulation on taxis and limos limits competition and are less likely to agree that Uber should have the same regulation as taxis.
- Regular UberX users (at least once a week) are more likely to be satisfied with the service than less frequent users.
- Among those who have used a taxi in the past year, satisfaction is lower for the ease of payment and knowledge of the area.
- UberX users are less likely to feel adequate insurance/ liability is an important factor in vehicle-for-hire service and more likely to prioritize technology and mobile apps.

UNDERSTANDING BEHAVIOUR

Familiarity with Transportation Services- By Key Subgroup

- Familiarity with Uber is significantly higher among younger residents, while older residents and to a lesser extent males are much more likely to be familiar with limo services.
- Familiarity with public transportation and taxi is highest among those who reside the old City of Toronto or York.

Very/Somewhat Familiar	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Public transportation	94%	96% C	95%	92%	95%	94%	90%	93%	95%	92%	97% FI	96%
Taxi	80%	78%	81%	81%	80%	80%	79%	82% I	78% I	69%	87% HI	91% HI
Limousine	44%	32%	44% A	56% AB	49% E	40%	43%	37%	48%	41%	48% G	35%
Uber	42%	60% BC	41% C	26%	44%	40%	31%	42%	43%	44%	42%	40%

Very/Somewhat Familiar	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Public transportation	94%	99% D	99% D	98%	98%	98%	99%
Taxi	80%	97% D	96% D	96%	96%	96%	97% L
Limousine	44%	66% CD	53% D	72% H	61%	78% L	65% L
Uber	42%	67% D	65% D	95%	92%	90%	91%

1. How familiar would you say that you are with the following types of transportation in the City of Toronto? Base: All respondents n=1004

UNDERSTANDING BEHAVIOUR

Familiarity with Uber Services- By Key Subgroup

- Familiarity with specific Uber services and UberX in particular is much higher among younger residents.

Very/Somewhat Familiar	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
UberTaxi	28%	38% C	32% C	15%	28%	28%	22%	29%	28%	30%	30%	17%
UberX	22%	38% BC	20% C	8%	22%	22%	14%	24%	20%	23%	23%	13%
UberPOOL	16%	24% BC	18% C	6%	16%	16%	2%	14%	17%	19%	17%	9%
UberBLACK	14%	23% BC	15% C	4%	15%	13%	7%	14%	16%	16%	13%	2%
Uber XL	13%	22% BC	14% C	4%	15%	12%	9%	12%	14%	15%	14%	4%
UberSelect	12%	20% BC	13% C	3%	14%	10%	2%	13%	14%	14%	12%	-

Very/Somewhat Familiar	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
UberTaxi	28%	56% D	52% D	81%	71%	86% L	89% L
UberX	22%	45% D	39% D	90% H	87% H	73%	67%
UberPOOL	16%	42% D	31% D	70% H	60% H	75% L	61% L
UberBLACK	14%	40% D	31% D	74% H	61% H	71% L	61% L
Uber XL	13%	40% CD	29% D	71% H	61% H	67% L	55%
UberSelect	12%	47% CD	30% D	71% H	58% H	82% KL	63% L

2. How familiar would you say that you are with the following Uber services?

Base: All respondents n=1004

UNDERSTANDING BEHAVIOUR

Usage and Frequency of Transportation Services

- Younger residents are more likely to have used public transit, taxis or Uber in the past year, while older residents are more likely to have used a limo.
- Public transit usage is highest among residents of Toronto, North York or York, while those who reside downtown are most likely to have used a taxi or limo.
- UberX or UberTaxi users are more likely than average to have used a taxi or taken public transit in the past year, while taxi users are more likely to have taken public transit or to have taken Uber.

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(N=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Public transportation	88%	93% BC	89% C	82%	87%	89%	85% *	82%	91% GI	84%	92% GI	89% *
Taxi	58%	67% BC	59% C	50%	57%	60%	47% *	60%	53%	53%	68% FHIK	52% *
Uber	21%	38% BC	21% C	5%	22%	21%	7% *	21% F	25% FK	22% FK	22% FK	9% *
Limousine	17%	11%	13%	29% AB	20%	15%	19% *	14%	15%	15%	24% GHIK	6% *

	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(N=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Public transportation	88%	96% D*	97% D	95% *	95%	92% *	95%
Taxi	58%	100% D*	100% D	88% *	88%	85% *	89%
Uber	21%	54% D*	48% D	100% *	100%	100% *	100%
Limousine	17%	31% D*	26% D	31% *	23%	30% L *	25%

3. Which, if any of the following types of transportation have you used in the City of Toronto in the past 12 months? Base: All respondents n=1004

UNDERSTANDING BEHAVIOUR

Usage and Frequency of Transportation Services

- Younger residents are more likely to have used public transit, taxis or limos on at least a weekly basis. Female residents are more likely to have taken public transit on a weekly basis.
- Regular taxi, UberX or UberTaxi users are more likely to also be weekly users of each service mentioned.

% At least 'once a week'	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
		A	B	C	D	E	F	G	H	I	J	K
Public transportation	65%	81% BC	68% C	44%	58%	71% D	53% *	62%	66%	67%	67%	54% *
Uber	37%	38%	35% *	35% **	40%	34%	- **	45% **	40% *	45% *	28% *	25% **
Taxi	17%	19% C	18% C	10%	18%	15%	9% **	15% *	17%	23%	16%	4% **
Limousine	7%	27% BC*	4% *	1% *	9% *	5% *	- **	6% **	9% J*	20% J*	1% *	- **

% At least 'once a week'	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
		B	C	F	G	J	K
Public transportation	65%	89% D*	84% D	93% H*	86%	94% L*	88%
Uber	37%	79% CD*	45% D	86% GH*	55% H	92% KL*	59% L
Taxi	17%	100% CD*	34% D	49% H*	40% H	72% KL*	45% L*
Limousine	7%	37% **	15% D*	50% **	32% **	50% **	32% **

4. How often, on average, have you used the following types of transportation in the past 12 months? Base: varies

UNDERSTANDING BEHAVIOUR

Frequency of Use of Uber Services (Used in Past Year)

- Younger residents are more likely to have used UberXL than older residents.
- Male residents are more likely to be regular users of UberPool, Black, Select or XL.

% Use at least 'once a week'	AGE			GENDER		REGION					
	18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Base: Have used Uber	(n=116)	(n=77*)	(n=17**)	(n=101)	(n=109)	(n=3**)	(n=26**)	(n=55*)	(n=51*)	(n=71*)	(n=4*)
	A	B	C	D	E	F	G	H	I	J	K
UberTaxi	30%	29% *	23% **	32%	26%	- **	27% **	34% *	37% *	21% *	25% **
UberX	32%	21% *	24% **	34%	22%	- **	38% **	31% *	29% *	23% *	- **
UberPOOL	21%	14% *	- **	23% E	12%	- **	26% **	23% J*	20% *	8% *	- **
UberBLACK	20%	14% *	6% **	24% E	11%	- **	23% **	25% J*	20% *	8% *	- **
UberSelect	20%	13% *	- **	24% E	9%	- **	23% **	22% J*	24% J*	6% *	- **
Uber XL	21% B	9% *	- **	22% E	9%	- **	19% **	26% J*	18% J*	6% *	- **

5. How often do you use the following types of Uber Services?

Base: Have used Uber (n=210)

UNDERSTANDING BEHAVIOUR

Uber and Taxi Usage (among Uber users)

- Female residents are more likely to report using an Uber service more often than they did a year ago.

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Base: Have used Uber	(n=210)	(n=116)	(n=77*)	(n=17**)	(n=101)	(n=109)	(n=3**)	(n=26**)	(n=55*)	(n=51*)	(n=71*)	(n=4**)
		A	B	C	D	E	F	G	H	I	J	K
More often	63%	63%	62% *	64% **	49%	75% D	100% **	69% **	62% *	51% *	70% I*	25% **
Less often	9%	11%	7% *	7% **	11%	8%	- **	15% **	11% *	12% J*	3% *	24% **
The same amount	28%	26%	32% *	29% **	40% E	18%	- **	16% **	27% *	37% *	27% *	50% **

	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
Base: Have used Uber	(n=210)	(n=52*)	(n=134)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
More often	63%	65% *	60%	74% *	67%	68% *	62%
Less often	9%	11% *	11%	10% *	11%	10% *	11%
The same amount	28%	23% *	29%	16% *	22%	22% *	27%

6. Would you say that you use Uber more often, less often, or the same amount as you did 12 months ago?

Base: Have used Uber (n=210)

UNDERSTANDING BEHAVIOUR

Uber and Taxi Usage (among Uber users)

- Male residents are more likely than female residents to report using taxis the same amount as they did before using Uber.

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Base: Have used Uber	(n=1004)	(n=116)	(n=77*)	(n=17**)	(n=101)	(n=109)	(n=3**)	(n=26**)	(n=55*)	(n=51*)	(n=71*)	(n=4**)
		A	B	C	D	E	F	G	H	I	J	K
More often	16%	16%	17% *	6% **	14%	17%	- **	23% **	18% *	16% *	13% *	- **
Less often	46%	46%	43% *	64% **	41%	51%	65% **	46% **	52% *	36% *	50% *	25% **
The same	34%	31%	39% *	30% **	41% E	28%	- **	31% **	22% *	43% H*	37% *	75% **
Did not use taxi services before using Uber	4%	6%	1% *	- **	4%	4%	35% **	- **	7% J*	6% J*	- *	- **

	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
Base: Have used Uber	(n=1004)	(n=52*)	(n=134)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
More often	16%	23% D*	19%	32% H*	20%	29% L*	21% L
Less often	46%	36% *	41%	47% *	48%	46% *	44%
The same	34%	41% *	38%	19% *	28%	24% *	32%
Did not use taxi services before using Uber	4%	- *	1%	2% *	4%	2% *	2%

7. 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 (n=210)

UNDERSTANDING BEHAVIOUR

Likelihood to Use Taxi Service in the Future- By Key Subgroup

- Among those who haven't used a taxi in the past year, 35-54 year olds are more likely to use the service in the future.

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Have not used Taxi in the past 12 months	(n=1004)	(n=99*)	(n=154)	(n=166)	(n=203)	(n=216)	(n=25**)	(n=52*)	(n=107)	(n=110)	(n=103)	(n=22**)
Very likely	8%	4% *	12% A	7%	9%	7%	16% **	11% *	7%	5%	9%	- **
Somewhat likely	29%	34% *	31%	24%	25%	33%	24% **	42% I*	28%	20%	29%	50% **
Somewhat unlikely	40%	42% *	34%	45% B	41%	40%	40% **	35% *	46%	42%	35%	46% **
Not at all likely	23%	21% *	23%	24%	24%	21%	20% **	12% *	18%	32% GH	27% G	5% **

8. You mentioned that you have not used a taxi in the past 12 months, how likely would you be to use a taxi service in the future?

Base: Have not used Taxi in the past 12 months (n=419)

UNDERSTANDING BEHAVIOUR

Likelihood to Use Taxi Service in the Future- By Key Subgroup

- Older residents or those who reside in Scarborough are more likely to prefer to drive themselves.

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=99*)	(n=154)	(n=166)	(n=203)	(n=216)	(n=25**)	(n=52*)	(n=107)	(n=110)	(n=103)	(n=22**)
		A	B	C	D	E	F	G	H	I	J	K
Negative(Net)	63%	59% *	61%	68%	63%	64%	64% **	50% *	63%	73% G	63%	50% **
Prefer Others (Subnet)	37%	31% *	30%	48% AB	33%	41%	32% **	31% *	33%	49% GHJ	35%	37% **
I have a car/ transportation/ prefer to drive myself	23%	7% *	19% A	36% AB	20%	25%	20% **	21% *	19%	40% GHJ	12%	19% **
Prefer public transportation (TTC)	15%	15% *	13%	17%	13%	17%	20% **	8% *	15%	14%	18%	18% **
Too expensive/ there are cheaper alternatives	23%	27% *	25%	18%	26%	20%	28% **	12% *	29% G	20%	24%	18% **
Need (Subnet)	8%	7% *	8%	8%	8%	7%	8% **	10% *	8%	6%	10%	4% **
No need/ not interested (unsp)	8%	7% *	8%	8%	8%	7%	8% **	10% *	8%	5%	10%	4% **
Positive (Net)	22%	20% *	25%	21%	21%	23%	24% **	19% *	27% I	15%	22%	36% **
Situation/ Need (Subnet)	15%	14% *	15%	16%	14%	16%	20% **	16% *	16%	11%	14%	27% **
Would use in an emergency	5%	5% *	4%	6%	5%	4%	12% **	2% *	4%	4%	7%	5% **
Neutral (Net)	11%	10% *	11%	11%	9%	12%	16% **	17% *	8%	8%	10%	18% **
Depends on the situation/ need	11%	10% *	10%	11%	9%	12%	16% **	17% *	7%	8%	10%	18% **
Don't know/ Not Applicable	8%	14% C*	8%	4%	11% E	5%	4% **	15% *	7%	6%	9%	4% **

*Responses <5% (topline) not shown

9. Why would you say that you would be [insert response from Q8] to use a taxi service in the future?

Base: Have not used Taxi in the past 12 months (n=419)

UNDERSTANDING BEHAVIOUR

Likelihood to Use Uber Service in the Future- By Key Subgroup

- Among those who haven't used Uber in the past year, younger residents or taxi users are more likely to be somewhat likely to do so in the future

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Have not used Uber in the past 12 months	(n=1004)	(n=184)	(n=298)	(n=312)	(n=368)	(n=426)	(n=44*)	(n=103)	(n=174)	(n=182)	(n=249)	(n=42*)
		A	B	C	D	E	F	G	H	I	J	K
Very likely	6%	8%	6%	4%	6%	6%	10% *	6%	6%	4%	7%	2% *
Somewhat likely	23%	33% C	27% C	13%	24%	22%	16% *	18%	20%	29% G	23%	29% *
Somewhat unlikely	29%	30%	30%	28%	27%	31%	36% *	32%	29%	22%	31% I	36% *
Not at all likely	42%	30%	38%	54% AB	43%	42%	38% *	45%	45%	45%	39%	33% *

	TOTAL	TAXI USAGE	
		At least once a week	At least once a month
Have not used Uber in the past 12 months	(n=1004)	(n=45*)	(n=146)
		B	C
Very likely	6%	13% D*	12% D
Somewhat likely	23%	38% D*	37% D
Somewhat unlikely	29%	22% *	26%
Not at all likely	42%	26% *	24%

10. You mentioned that you have not used Uber in the past 12 months, how likely would you be to use Uber service in the future?

Base: Have not used Uber in the past 12 months (n=794)

UNDERSTANDING BEHAVIOUR

Likelihood to Use Uber Service in the Future- By Key Subgroup

- Older residents are more likely to prefer a licensed/ insured/ regulated taxi.

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=184)	(n=298)	(n=312)	(n=368)	(n=426)	(n=44*)	(n=103)	(n=174)	(n=182)	(n=249)	(n=42*)
		A	B	C	D	E	F	G	H	I	J	K
Negative (Net)	72%	60%	69% A	82% AB	69%	75% D	77% *	73%	76%	69%	72%	68% *
Prefer Others (Subnet)	29%	19%	28% A	34% A	28%	29%	27% *	24%	35% I	23%	31%	26% *
Prefer licensed/ insured/ regulated taxi company	16%	7%	17% A	22% A	17%	16%	9% *	13%	22% FGI	9%	22% FGI	12% *
I have a car/ transportation/ prefer to drive myself	8%	5%	8%	11% A	8%	9%	9% *	8%	8%	11% J	5%	14% J*
Prefer public transportation (TTC)	7%	10%	6%	6%	6%	8%	16% GIK*	5%	8%	4%	9%	2% *
Unfamiliar/ need more information	14%	13%	15%	14%	12%	16%	16% *	11%	13%	13%	16%	19% *
Need (Subnet)	12%	9%	12%	15% A	12%	12%	18% J*	15%	11%	16% J	8%	12% *
No need/ not interested (unsp)	12%	9%	11%	15% A	11%	12%	18% J*	15%	11%	15% J	8%	12% *
Concerns Regarding Service (Subnet)	12%	9%	13%	12%	10%	13%	18% IK*	9%	18% GIK	6%	13% IK	2% *
Concerned about safety	8%	5%	11% A	7%	5%	10% D	9% *	4%	13% GIK	4%	10% GI	2% *
Unreliable/ I don't trust it	7%	8%	5%	8%	6%	8%	4% *	6%	6%	8%	7%	7% *
I don't have a cell phone/ smart phone	5%	1%	2%	12% AB	8% E	3%	2% *	7%	5%	5%	6%	7% *
Heard negative things about it	4%	4%	4%	5%	4%	5%	4% *	3%	5%	4%	3%	7% *
Positive (Net)	20%	28% C	22% C	13%	21%	19%	23% *	16%	18%	23%	21%	22% *
Cheaper than the alternative	7%	11% C	7%	4%	7%	7%	9% *	9%	6%	6%	7%	5% *
New service/ would like to try it out	5%	7% C	5%	3%	6%	4%	2% *	1%	5%	6% G	4%	7% G*
Situation/ Need (Subnet)	4%	5%	4%	2%	4%	3%	5% *	1%	3%	6%	2%	7% G*
Other likely to use mentions	4%	4%	5%	4%	4%	4%	2% *	3%	3%	2%	7% I	5% *
Don't know/ Not Applicable	7%	10% C	8% C	4%	9%	6%	2% *	12%	6%	9%	6%	5% *

11. Why would you say that you would be [insert response from Q10] to use Uber in the future? Base: Have not used Uber in the past 12 months (n=794)

UNDERSTANDING BEHAVIOUR

Likelihood to Use Uber Service in the Future- By Key Subgroup

- Taxi users are more likely to feel Uber is cheaper than the alternative.

	TOTAL	TAXI USAGE	
		At least once a week	At least once a month
	(n=1004)	(n=45*)	(n=146)
		B	C
Negative(Net)	72%	62% *	59%
Prefer Others (Subnet)	29%	20% *	22%
Prefer licensed/ insured/ regulated taxi company	16%	20% *	18%
I have a car/ transportation/ prefer to drive myself	8%	- *	3%
Prefer public transportation (TTC)	7%	- *	2%
Unfamiliar/ need more information	14%	16% *	14%
Need (Subnet)	12%	2% *	3%
No need/ not interested (unsp)	12%	2% *	3%
Concerns Regarding Service (Subnet)	12%	15% *	13%
Concerned about safety	8%	9% *	11%
Unreliable/ I don't trust it	7%	11% *	5%
I don't have a cell phone/ smart phone	5%	7% *	8%
Heard negative things about it	4%	4% *	7%
Positive (Net)	20%	31% D*	34% D
Cheaper than the alternative	7%	9% *	11% D
New service/ would like to try it out	5%	9% D*	11% D
Situation/ Need (Subnet)	4%	2% *	4%
Other likely to use mentions	4%	11% D*	7%
Don't know/ Not Applicable	7%	9% *	5%

*Responses <4% (topline) not shown

11. Why would you say that you would be [insert response from Q10] to use Uber in the future?

Base: Have not used Uber in the past 12 months (n=794)

OPINIONS TOWARDS REGULATION OF VEHICLE-FOR-HIRE SERVICES

Support for Regulations on Vehicle-for-Hire Services

- Female and older residents are more likely to support regulation in virtually all areas. The largest gap between the youngest and oldest residents is support for insurance/ liability coverage, customer service training and fares, while the gap between male and female residents is largest for regularity of training and insurance/ liability coverage.
- Residents of York are more likely to support regulation that requires criminal records checks for drivers, protection in the case of unsafe service and availability of vehicles at peak times.

Strongly/Somewhat Support	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Criminal record checks for drivers	86%	83%	85%	89% A	80%	91% D	91% *	83%	85%	83%	87%	96% GHI*
Safety training for drivers	85%	79%	86% A	88% A	78%	91% D	89% *	84%	81%	86%	86%	85% *
Protection in the case of bad/unsafe service	84%	82%	83%	88% AB	79%	89% D	91% G*	77%	83%	84%	85% G	96% GHI*
Insurance/ liability coverage for passengers	82%	75%	80%	90% AB	79%	84% D	85% *	80%	81%	82%	82%	87% *
Regularity of driver training	79%	76%	80%	81%	70%	87% D	85% *	78%	78%	81%	77%	85% *
Cameras in vehicles	75%	68%	78% A	78% A	69%	80% D	79% *	73%	75%	74%	76%	76% *
Markings on vehicles to identify available for hire	74%	69%	76%	78% A	69%	79% D	72% *	70%	76%	72%	76%	80% *
Customer service training for drivers	74%	65%	77% A	80% A	69%	79% D	76% *	69%	74%	76%	75%	76% *
Training about major road networks/venues	74%	70%	73%	78% A	67%	80% D	76% *	72%	70%	79% H	73%	76% *
Emergency flashing lights	73%	72%	73%	75%	68%	79% D	76% *	74%	71%	75%	73%	76% *
Availability of vehicles during peak times	68%	68%	67%	67%	61%	74% D	66% *	68%	68%	70%	63%	78% J*
Fares	65%	56%	70% A	69% A	59%	71% D	68% *	62%	62%	65%	68%	74% *
Level of income for the driver	52%	56%	53%	49%	46%	58% D	60% *	51%	51%	56%	51%	50% *

12. Thinking about the role of the City of Toronto in regulating vehicle-for-hire services, how much do you support or oppose the City regulate each of the following areas? Base: All respondents (n=1004)

OPINIONS TOWARDS REGULATION OF VEHICLE-FOR-HIRE SERVICES

Support for Regulations on Vehicle-for-Hire Services

- Weekly taxi users are more likely to support regulation of income for drivers, training about the road network and availability of vehicles during peak times.
- UberTaxi users are more likely to support markings on vehicles, customer service training, availability during peak times or fares.

Strongly/Somewhat Support	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Criminal record checks for drivers	86%	87% *	87%	76% *	81%	80% *	83%
Safety training for drivers	85%	84% *	88%	70% *	75%	75% *	81%
Protection in the case of bad/unsafe service	84%	84% *	85%	79% *	80%	80% *	83%
Insurance/ liability coverage for passengers	82%	89% *	85%	72% *	78%	80% *	81%
Regularity of driver training	79%	83% *	81%	67% *	71%	74% *	79%
Cameras in vehicles	75%	73% *	77%	63% *	67%	69% *	74%
Markings on vehicles to identify vehicles available for hire	74%	80% *	76%	67% *	65%	75% L*	74% L
Customer service training for drivers	74%	81% *	77%	67% *	66%	75% L*	74% L
Training about major road networks/venues in the City of Toronto	74%	83% D*	80% D	67% *	70%	80% *	77%
Emergency flashing lights	73%	75% *	74%	71% *	67%	72% *	73%
Availability of vehicles during peak times	68%	75% *	73% D	72% *	69%	72% *	73% L
Fares	65%	64% *	68%	56% *	56%	65% *	65% L
Level of income for the driver	52%	64% D*	58% D	55% *	51%	59% *	57%

12. Thinking about the role of the City of Toronto in regulating vehicle-for-hire services, how much do you support or oppose the City regulate each of the following areas? Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Specific Transportation Services- Taxis

- Female and older residents are more likely to support regulation in every area.
- Residents of York are more likely to support insurance/ liability coverage, safety training for drivers and customer service training.

%	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Insurance/ liability coverage for passengers	83%	75%	81%	92% AB	79%	86% D	85% *	80%	78%	81%	87% GHI	91% H*
Criminal record checks for drivers	82%	77%	83%	88% A	76%	88% D	89% *	79%	77%	83%	86% H	87% *
Safety training for drivers	82%	77%	79%	89% AB	76%	87% D	85% *	78%	78%	82%	83%	91% H*
Ability to launch complaint to the City of Toronto in the case of bad/unsafe service	79%	74%	77%	87% AB	73%	85% D	85% *	72%	76%	80%	83% GH	82% *
Markings on vehicles to identify vehicles available for hire	76%	69%	75%	85% AB	71%	81% D	76% *	68%	72%	79% G	80% GH	82% *
Training updates every four years	74%	68%	75% A	79% A	68%	80% D	74% *	67%	74%	75%	75%	83% *
Training about major road networks/venues in the City of Toronto	73%	66%	72%	80% AB	67%	78% D	74% *	71%	70%	72%	75%	83% *
Customer service training for drivers	72%	61%	74% A	80% A	66%	77% D	76% *	71%	70%	70%	72%	85% HI*
Cameras in vehicles	72%	64%	76% A	75% A	66%	77% D	75% *	71%	71%	72%	70%	83% *
Emergency flashing lights	70%	66%	69%	74% A	63%	76% D	80% *	65%	69%	68%	71%	78% *
Regulated fares (consistent and predetermined)	66%	57%	68% A	72% A	58%	73% D	68% *	61%	65%	64%	68%	76% *
Market fares (based on supply and demand)	50%	44%	51%	56% A	47%	53% D	42% *	51%	48%	53%	50%	50% *
None of the above	6%	6%	7%	5%	10% E	3%	9% *	8%	7%	6%	5%	2% *

25. Which of the following regulations should apply to the following types of transportation services? Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Specific Transportation Services- Taxis (cont'd)

- Taxi, UberX and UberTaxi users are less likely to support regulation in each area, Uber users even more so than taxi users.

%	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Insurance/ liability coverage for passengers	83%	68% *	76%	60% *	64%	56% *	63%
Criminal record checks for drivers	82%	67% *	76%	62% *	66%	56% *	67%
Safety training for drivers	82%	72% *	77%	54% *	61%	56% *	63%
Ability to launch complaint to the City of Toronto in the case of bad/unsafe service	79%	62% *	73% B	55% *	58%	51% *	60%
Markings on vehicles to identify vehicles available for hire	76%	62% *	70%	50% *	54%	46% *	57%
Training updates every four years	74%	61% *	69%	55% *	56%	51% *	61%
Training about major road networks/venues in the City of Toronto	73%	56% *	65%	47% *	56%	46% *	59%
Customer service training for drivers	72%	63% *	69%	54% *	57%	48% *	60%
Cameras in vehicles	72%	60% *	68%	46% *	53%	48% *	60%
Emergency flashing lights	70%	61% *	66%	52% *	51%	51% *	56%
Regulated fares (consistent and predetermined)	66%	47% *	60% B	38% *	45%	35% *	45%
Market fares (based on supply and demand)	50%	42% *	43%	41% *	40%	36% *	42%
None of the above	6%	6% *	6%	5% *	7%	5% *	6%

25. Which of the following regulations should apply to the following types of transportation services? Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Specific Transportation Services- Limos

- Female and older residents are more likely to support regulation in every area.
- Residents of York are more likely to support safety training for drivers, customer service training or cameras in vehicles.

%	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Insurance/ liability coverage for passengers	81%	72%	79% A	92% AB	77%	84% D	85% *	78%	75%	80%	85% H	82% *
Criminal record checks for drivers	80%	75%	79%	85% AB	73%	86% D	87% *	78%	75%	80%	82%	87% *
Safety training for drivers	79%	75%	75%	87% AB	73%	85% D	83% *	74%	75%	77%	82% GH	93% GHI*
Ability to launch complaint to the City of Toronto in the case of bad/unsafe service	74%	66%	72%	84% AB	68%	80% D	78% *	67%	71%	75%	77% G	80% *
Customer service training for drivers	70%	63%	70%	78% AB	63%	77% D	72% *	67%	68%	71%	70%	85% GHJ*
Training updates every four years	68%	61%	68%	75% A	61%	74% D	70% *	64%	67%	67%	70%	76% *
Training about major road networks/venues in the City of Toronto	68%	61%	66%	78% AB	61%	74% D	65% *	66%	65%	69%	71%	71% *
Emergency flashing lights	61%	55%	61%	68% AB	55%	67% D	66% *	63%	59%	59%	61%	72% *
Cameras in vehicles	61%	50%	64% A	67% A	55%	66% D	53% *	56%	61%	59%	62%	76% FGI*
Markings on vehicles to identify vehicles available for hire	60%	50%	59% A	71% AB	56%	64% D	61% *	53%	57%	64% G	63%	63% *
Regulated fares	59%	48%	60% A	68% AB	53%	65% D	61% *	57%	56%	57%	61%	71% *
Market fares	46%	38%	48% A	50% A	42%	49% D	36% *	55% FHK	41%	47%	48%	33% *
None of the above	7%	8%	8% C	5%	10% E	4%	13% *	8%	7%	7%	6%	4% *

25. Which of the following regulations should apply to the following types of transportation services? Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Specific Transportation Services- Limos (cont'd)

- Taxi, UberX and UberTaxi users are less likely to support regulation in most every area, Uber users even more so than taxi users.

%	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Insurance/ liability coverage for passengers	81%	68% *	75%	65% *	63%	57% *	65%
Criminal record checks for drivers	80%	65% *	72%	61% *	62%	54% *	64%
Safety training for drivers	79%	67% *	73%	47% *	58%	51% *	60%
Ability to launch complaint to the City of Toronto in the case of bad/unsafe service	74%	56% *	66%	46% *	50%	44% *	50%
Customer service training for drivers	70%	59% *	66%	40% *	50%	46% *	57%
Training updates every four years	68%	59% *	63%	41% *	47%	48% *	56%
Training about major road networks/venues in the City of Toronto	68%	57% *	61%	35% *	43%	35% *	47%
Emergency flashing lights	61%	54% *	56%	42% *	41%	35% *	42%
Cameras in vehicles	61%	50% *	58%	36% *	44%	38% *	47%
Markings on vehicles to identify vehicles available for hire	60%	50% *	54%	36% *	36%	33% *	40%
Regulated fares (consistent and predetermined)	59%	43% *	53%	43% *	46%	40% *	45%
Market fares (based on supply and demand)	46%	42% *	41%	35% *	33%	26% *	33%
None of the above	7%	4% *	6%	7% *	9%	8% *	9%

25. Which of the following regulations should apply to the following types of transportation services? Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Specific Transportation Services- Uber

- Females and older residents are more likely to support regulation in every area.
- Residents of the old City of Toronto are more likely to support insurance/ liability coverage, ability to launch a complaint, safety training for drivers or customer service training.

%	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Criminal record checks for drivers	79%	74%	78%	85% AB	72%	85% D	89% H*	78%	75%	78%	80%	85% *
Safety training for drivers	77%	73%	76%	83% AB	71%	83% D	85% *	72%	73%	79%	78%	85% *
Insurance/ liability coverage for passengers	77%	65%	75% A	90% AB	74%	79% D	83% *	73%	71%	75%	82% GH	82% *
Ability to launch complaint to the City of Toronto in the case of bad/unsafe service	68%	57%	69% A	79% AB	63%	73% D	68% *	63%	65%	68%	74% GH	69% *
Training about major road networks/venues in the City of Toronto	64%	56%	62%	72% AB	57%	69% D	66% *	65%	58%	62%	67% H	67% *
Training updates every four years	63%	54%	63% A	72% AB	57%	69% D	66% *	56%	60%	63%	68% G	70% *
Customer service training for drivers	62%	53%	63% A	71% AB	56%	68% D	68% *	60%	60%	65%	63%	61% *
Emergency flashing lights	59%	54%	58%	66% AB	52%	66% D	67% *	61%	57%	58%	60%	63% *
Cameras in vehicles	59%	49%	62% A	65% A	51%	66% D	64% *	59%	55%	56%	62%	67% *
Markings on vehicles to identify available for hire	58%	48%	58% A	69% AB	52%	64% D	61% *	49%	54%	61% G	62% G	67% G*
Market fares (based on supply and demand)	49%	41%	49% A	57% AB	48%	51%	59% HK*	51%	42%	51% K	54% HK	35% *
Regulated fares (consistent and predetermined)	48%	38%	52% A	52% A	41%	53% D	42% *	44%	48%	46%	49%	60% *
None of the above	8%	10% C	10% C	5%	11% E	6%	6% *	9%	11%	7%	8%	7% *

25. Which of the following regulations should apply to the following types of transportation services? Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Specific Transportation Services- Uber

- Taxi, UberX and UberTaxi users are less likely to support regulation in most every area, Uber users even more so than taxi users.

%	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Criminal record checks for drivers	79%	65% *	70%	53% *	59%	54% *	61%
Safety training for drivers	77%	71% *	76%	50% *	60%	52% *	63%
Insurance/ liability coverage for passengers	77%	65% *	72%	51% *	56%	51% *	59%
Ability to launch complaint to the City of Toronto in the case of bad/unsafe service	68%	53% *	61%	39% *	43%	38% *	46%
Training about major road networks/venues in the City of Toronto	64%	50% *	57%	31% *	44%	36% *	50%
Training updates every four years	63%	53% *	57%	36% *	40%	41% *	50%
Customer service training for drivers	62%	60% *	61%	46% *	50%	54% *	61%
Emergency flashing lights	59%	61% *	54%	43% *	40%	43% *	40%
Cameras in vehicles	59%	46% *	53%	24% *	36%	41% *	44%
Markings on vehicles to identify vehicles available for hire	58%	49% *	52%	27% *	31%	31% *	39%
Market fares (based on supply and demand)	49%	42% *	42%	32% *	35%	34% *	38%
Regulated fares (consistent and predetermined)	48%	40% *	42%	31% *	31%	33% *	33%
None of the above	8%	7% *	8%	10% *	11%	10% *	11%

25. Which of the following regulations should apply to the following types of transportation services?

Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Awareness That UberX, XL and Select Services Are Not Regulated

- Awareness is higher among older residents, males and UberX riders.

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Yes	79%	75%	76%	87% AB	83% E	76%	79% *	82%	79%	76%	81%	74% *
No	21%	25% C	24% C	13%	17%	24% D	21% *	18%	21%	24%	19%	26% *

	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Yes	79%	75% *	75%	88% *	87%	74% *	83%
No	21%	25% *	25%	12% *	13%	26% L*	17% L

22. Before today, were you aware that Uber is not regulated the same way as taxis?

Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Regulation

- Female and older residents are more likely to agree that Uber drivers should be required to follow the same regulation as taxi drivers, while younger residents are more likely to agree that Uber should be allowed to operate even if their services are not regulated as much as taxis or that regulations on taxis should be relaxed to allow them to compete with Uber.
- Residents of Scarborough are more likely to agree that regulations for taxis should be related to allow them to compete with Uber.

Strongly/Somewhat Agree	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
People should be able to choose for themselves whether they want to use Uber or taxi services	80%	83%	80%	78%	79%	82%	85% *	83%	79%	82%	79%	78% *
Uber drivers should be required to follow the same regulations as taxi drivers in the City of Toronto	69%	60%	71% A	77% A	66%	72% D	74% *	65%	67%	71%	70%	76% *
Uber should be allowed to operate in the City of Toronto, even if these services are not regulated as much as taxis	51%	65% BC	52% C	36%	54%	49%	52% *	47%	52%	56%	49%	46% *
Regulations for taxi services should be relaxed to let them compete with Uber	50%	56% C	51%	44%	53%	48%	39% *	52%	49%	57% FJ	47%	59% *
Uber should charge the same amount of money for trips as taxi services	30%	27%	31%	31%	31%	28%	21% *	27%	29%	32%	31%	26% *

23. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Regulation

- Both Taxi and Uber users are more likely to agree that Uber should be allowed to operate even if their services are not regulated as taxis and that regulations for taxis should be relaxed to allow them to compete with Uber.
- Taxi and UberTaxi drivers are more likely to agree that Uber should charge the same amount as taxi services.
- Uber users are less likely to agree that drivers should be required to follow the same regulations as taxi drivers.

Strongly/Somewhat Agree	TOTAL (n=1004)	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week (n=97*)	At least once a month (n=280)	At least once a week (n=58*)	At least once a month (n=121)	At least once a week (n=61*)	At least once a month (n=112)
		B	C	F	G	J	K
People should be able to choose for themselves whether they want to use Uber or taxi services	80%	78% *	85% D	81% *	87%	78% *	87%
Uber drivers should be required to follow the same regulations as taxi drivers in the City of Toronto	69%	75% *	72%	56% *	52%	66% L *	62%
Uber should be allowed to operate in the City of Toronto, even if these services are not regulated as much as taxis	51%	64% D*	62% D	78% *	80%	77% *	79%
Regulations for taxi services should be relaxed to let them complete with Uber	50%	60% D*	59% D	68% *	71%	66% *	69%
Uber should charge the same amount of money for trips as taxi services	30%	42% D*	32%	39% H*	31%	44% L *	36% L

23. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Regulation

- Older residents and taxi users are more likely to feel that the same rules should apply to both taxis and Uber, while UberX users are more likely to feel that Uber does not need to be as regulated and ultimately it is the customers decision.

	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Some people say that the same rules and regulations that apply to taxi services should apply to Uber...	56%	46%	60% A	62% A	54%	58%	46% *	58%	54%	58%	57%	57% *
Other people say that Uber does not need to be as regulated as taxi services...	44%	54% BC	40%	38%	46%	42%	54% *	42%	46%	42%	43%	43% *

	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Some people say that the same rules and regulations that apply to taxi services should apply to Uber...	56%	65% *	57%	48% *	42%	56% L*	52% L
Other people say that Uber does not need to be as regulated as taxi services...	44%	35% *	43%	52% *	58%	44% *	48%

24. Which of the following two statements are closest to your point of view?

Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Number of Taxi Cabs

- Younger residents are more likely to feel that the City should reduce the number of taxis or keep it steady, while older residents are more likely to agree that the City should either increase the number of taxis or not limit the number at all.
- Female residents are more likely to agree that the City should keep the number of taxis at the current level.

Taxis	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
The City should continue to limit the number of taxicabs that can operate in Toronto but reduce the number of vehicles allowed to operate.	14%	15% C	16% C	10%	14%	14%	9% *	15%	16%	15%	12%	11% *
The City should continue to limit the number of taxicabs that can operate in Toronto and keep the number of taxis at the current level.	38%	41% C	39%	32%	32%	43% D	45% *	30%	38%	37%	40%	39% *
The City should continue to limit the number of taxicabs that can operate in Toronto and add more taxis than currently operate	16%	15%	13%	20% B	15%	17%	21% *	19%	15%	15%	16%	9% *
The City should not limit the number of taxicabs that can operate in Toronto at all	33%	28%	32%	38% A	39% E	27%	26% *	36%	31%	32%	32%	41% *

27. Considering this information, which of the following is closest to your point of view regarding taxis?

Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Number of Taxi Cabs

- Taxi, UberX and UberTaxi users are more likely to feel that the City should reduce the number of taxis allowed to operate.

Taxis	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
The City should continue to limit the number of taxicabs that can operate in Toronto but reduce the number of vehicles allowed to operate.	14%	28% CD*	18% D	26% H*	19%	23% L*	22% L
The City should continue to limit the number of taxicabs that can operate in Toronto and keep the number of taxis at the current level.	38%	33% *	36%	36% *	42%	45% *	39%
The City should continue to limit the number of taxicabs that can operate in Toronto and add more taxis than currently operate	16%	14% *	18%	12% *	8%	15% *	12%
The City should not limit the number of taxicabs that can operate in Toronto at all	33%	24% *	29%	26% *	32%	18% *	26%

27. Considering this information, which of the following is closest to your point of view regarding taxis?

Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Number of Uber Drivers

- Older residents are more likely to feel the City should reduce the number of UberX drivers allowed to operate, while younger residents are more likely to feel that the City should limit the number of UberX drivers but keep it at the current level.

UberX drivers	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
The City should limit the number of UberX drivers that can operate in Toronto and reduce the number allowed to operate below current level.	30%	25%	27%	38% AB	26%	33% D	32% *	29%	29%	31%	30%	35% *
The City should limit the number of UberX drivers that can operate in Toronto and keep the number allowed to operate at the current level.	22%	30% BC	22% C	14%	19%	24% D	17% *	19%	24%	23%	20%	26% *
The City should limit the number of UberX drivers that can operate in Toronto and allow more vehicles to operate than currently do.	10%	7%	13% AC	8%	10%	10%	6% *	10%	10%	10%	11%	4% *
The City should not limit the number of UberX drivers that can operate in Toronto at all	39%	37%	38%	40%	45% E	33%	45% *	42%	38%	36%	39%	35% *

28. Considering this information, which of the following is closest to your point of view regarding UberX drivers?

Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Regulation of Number of Uber Drivers

- UberX users are more likely to feel that the City should limit the number of UberX drivers but keep the it at the current level or increase it, while UberTaxi users are more likely to feel it should stay at its current level.

UberX drivers	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
The City should limit the number of UberX drivers that can operate in Toronto and reduce the number allowed to operate below current level.	30%	33% *	28%	19% *	17%	23% L *	25% L
The City should limit the number of UberX drivers that can operate in Toronto and keep the number allowed to operate at the current level.	22%	23% *	22%	28% *	28%	34% *	28%
The City should limit the number of UberX drivers that can operate in Toronto and allow more vehicles to operate than currently do.	10%	9% *	12%	19% *	10%	13% *	11%
The City should not limit the number of UberX drivers that can operate in Toronto at all	39%	35% *	39%	35% *	45%	30% *	36%

28. Considering this information, which of the following is closest to your point of view regarding UberX drivers?

Base: All respondents (n=1004)

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Transportation Services

- Satisfaction with limos, taxis and public transportation is higher among older users.
- Satisfaction with taxi services is higher among weekly users, while satisfaction with Uber is higher among weekly UberX users.

Satisfied (8-10)	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
		A	B	C	D	E	F	G	H	I	J	K
Uber	65%	66%	61% *	71% **	63%	66%	69% **	61% **	58% *	77% H*	61% *	100% **
Limousine	61%	42% *	60% *	68% A*	58% *	65% *	33% **	55% **	54% *	72% *	62% *	100% **
Public transportation	38%	30%	37%	47% AB	37%	39%	37% *	36%	33%	37%	42% H	46% *
Taxi	29%	19%	30% A	39% A	30%	28%	18% **	26% *	22%	35% H	30%	41% **

Satisfied (8-10)	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
		B	C	F	G	J	K
Uber	65%	60% *	60%	77% H*	71%	64% *	64%
Limousine	61%	60% **	58% *	61% **	60% **	61% **	64% **
Public transportation	38%	45% *	42%	36% *	32%	36% *	38%
Taxi	29%	42% D*	33% D	27% *	24%	33% L*	30% L*

13. Overall, how satisfied would you say that you are with the following types of transportation using a scale of 1 to 10 where 1 means very unsatisfied and 10 means very satisfied? Base: Have used service (varies)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Taxi Services

- Older taxi users are more likely to cite having a good experience or to make a positive comment about taxi drivers.

Taxi Experience	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=585)	(n=201)	(n=221)	(n=163)	(n=266)	(n=319)	(n=22**)	(n=77*)	(n=122)	(n=123)	(n=217)	(n=24**)
		A	B	C	D	E	F	G	H	I	J	K
Positive (Net)	62%	59%	63%	65%	58%	66% D	50% **	63% *	58%	63%	63%	79% **
Previous Experience (Subnet)	24%	24%	22%	28%	25%	24%	32% **	28% *	29%	22%	21%	17% **
Good experience/ no problems/issues	15%	13%	13%	21% AB	17%	14%	9% **	19% *	20%	15%	13%	9% **
Gets me where I want to go	10%	12%	10%	9%	8%	12%	28% **	10% *	11%	9%	9%	8% **
Ease/Convenience (Subnet)	9%	18%	23%	18%	17%	22%	18% **	15% *	21%	20%	20%	21% **
Quick service/ efficient	5%	10%	8%	10%	7%	11%	14% **	14% *	6%	7%	10%	12% **
Good availability	5%	2%	7% A	8% A	6%	5%	- **	- *	7% G	6% G	7% G	8% **
Convenient/ easy to use	5%	6%	6%	3%	5%	6%	4% **	1% *	9% G	6%	4%	4% **
Reliability (Subnet)	13%	10%	14%	14%	10%	15%	- **	15% *	11%	11%	14%	17% **
Reliable/ trustworthy	6%	6%	6%	5%	4%	7%	- **	5% *	6%	3%	8%	13% **
Safe	4%	3%	5%	4%	3%	5%	- **	3% *	2%	7%	4%	4% **
Drivers (Subnet)	12%	7%	11%	20% AB	9%	15% D	- **	8% *	8%	8%	19% GHI	16% **
Friendly/ polite drivers	7%	5%	7%	10% A	5%	9% D	- **	4% *	5%	5%	11%	8% **
Knowledgeable drivers	4%	1%	4% A	6% A	3%	4%	- **	3% *	1%	1%	7% HI	8% **
Good idea/ good service/ option	9%	11%	7%	8%	9%	9%	13% **	6% *	9%	11%	7%	12% **
Cars (Subnet)	4%	2%	5%	7% A	4%	5%	4% **	5% *	2%	6%	5%	4% **
Cars are clean/ in good condition	4%	1%	4%	7% A	3%	5%	- **	4% *	2%	6%	5%	4% **
Fares (Subnet)	4%	5%	3%	2%	3%	4%	- **	5% *	2%	3%	4%	9% **

14. Why would you say that you are ['unsatisfied' / 'neither unsatisfied or satisfied' / 'satisfied'] with your taxi experience overall? Base: Have used Taxi (n=585)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Taxi Services

- Younger taxi users and females are more likely to feel that taxi services are too expensive.
- Residents of the old City of Toronto are more likely to make a negative comment about taxi drivers being rude or unsafe.

Taxi Experience	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=585)	(n=201)	(n=221)	(n=163)	(n=266)	(n=319)	(n=22**)	(n=77*)	(n=122)	(n=123)	(n=217)	(n=24**)
		A	B	C	D	E	F	G	H	I	J	K
Negative (Net)	35%	40% C	33%	29%	33%	36%	51% **	30% *	38%	33%	36%	21% **
Fares (Subnet)	18%	25% C	18% C	10%	15%	21% D	28% **	13% *	22%	23% J	15%	12% **
Expensive	18%	24% C	18% C	10%	14%	21% D	28% **	13% *	22%	23% J	14%	12% **
Drivers (Subnet)	16%	17%	17%	15%	17%	16%	18% **	12% *	13%	15%	22% GH	4% **
Drivers are rude/ have bad attitudes	10%	13%	9%	7%	10%	10%	5% **	10% *	11%	6%	14% I	- **
Reckless/ unsafe drivers	7%	5%	8%	8%	8%	6%	9% **	3% *	4%	6%	10% G	4% **
Drivers don't take a direct route	3%	3%	4%	1%	1%	4% D	4% **	1% *	2%	5%	4%	- **
Vehicles (Subnet)	7%	3%	9% A	9% A	8%	6%	14% **	12% HI*	3%	4%	9% H	4% **
Unclean/ smelly vehicles	6%	3%	8%	9% A	8%	5%	9% **	12% HI*	3%	3%	8%	4% **
Ease/ Convenience (Subnet)	4%	2%	3%	6%	4%	3%	4% **	1% *	8% GJ	3%	2%	4% **
Experiences (Subnet)	3%	4%	3%	1%	2%	4%	- **	3% *	3%	2%	5%	- **
Poor customer service	3%	3%	3%	2%	3%	2%	9% **	4% *	2%	3%	2%	- **
Neutral (Net)	9%	7%	8%	14% A	10%	8%	14% **	8% *	11%	9%	10%	4% **
Don't use it enough	6%	3%	5%	11% AB	7%	5%	5% **	5% *	8%	7%	5%	4% **
Don't know/ Not Applicable	8%	11% C	7%	4%	9%	6%	13% **	6% *	11%	7%	7%	- **

14. Why would you say that you are ['unsatisfied' / 'neither unsatisfied or satisfied' / 'satisfied'] with your taxi experience overall? Base: Have used Taxi (n=585)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Taxi Services

- Regular taxi users are more likely to feel that they are quick and reliable, while UberX users are less likely to cite a previous good experience with taxis or make a positive comment about drivers.

Taxi Experience	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=585)	(n=97*)	(n=280)	(n=51*)	(n=106)	(n=52*)	(n=100)
		B	C	F	G	J	K
Positive (Net)	62%	71% D*	68% D	45% *	55%	60% *	62% L*
Previous Experience (Subnet)	24%	18% *	22%	12% *	13%	10% *	18% *
Good experience/ no problems/issues	15%	10% *	12%	6% *	7%	4% *	8% *
Gets me where I want to go	10%	7% *	10%	6% *	7%	6% *	10% *
Ease/Convenience (Subnet)	9%	23% *	21%	10% *	16%	19% *	17% *
Quick service/ efficient	5%	11% *	10%	4% *	10%	8% *	8% *
Good availability	5%	4% *	6%	- *	3%	6% *	4% *
Convenient/ easy to use	5%	7% *	7%	6% *	7%	8% *	8% *
Reliability (Subnet)	13%	19% *	12%	6% *	11%	10% *	12% *
Reliable/ trustworthy	6%	11% *	6%	4% *	4%	6% *	6% *
Safe	4%	6% *	4%	- *	4%	4% *	5% *
Drivers (Subnet)	12%	8% *	13%	2% *	7%	4% *	5% *
Friendly/ polite drivers	7%	3% *	8%	2% *	6%	2% *	3% *
Knowledgeable drivers	4%	2% *	3%	- *	1%	2% *	3% *
Good idea/ good service/ option	9%	11% *	11%	14% *	11%	15% *	14% *
Cars (Subnet)	4%	6% *	5%	2% *	3%	2% *	3% *
Cars are clean/ in good condition	4%	3% *	3%	- *	2%	- *	2% *
Fares (Subnet)	4%	2% *	3%	4% *	2%	2% *	4% *

14. Why would you say that you are ['unsatisfied' / 'neither unsatisfied or satisfied' / 'satisfied'] with your taxi experience overall? Base: Have used Taxi (n=585)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Taxi Services

- UberX users are more likely to make a negative comment about rude drivers or having a bad previous experience.

Taxi Experience	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=585)	(n=97*)	(n=280)	(n=51*)	(n=106)	(n=52*)	(n=100)
		B	C	F	G	J	K
Negative (Net)	35%	24% *	33%	43% *	39%	25% *	31% *
Fares (Subnet)	18%	8% *	15%	24% *	22%	7% *	14% *
Expensive	18%	8% *	15%	20% *	20%	7% *	14% *
Drivers (Subnet)	16%	13% *	17%	33% *	25%	18% *	16% *
Drivers are rude/ have bad attitudes	10%	9% *	12%	30% *	21%	18% *	16% *
Reckless/ unsafe drivers	7%	2% *	6%	8% *	9%	6% *	5% *
Drivers don't take a direct route	3%	2% *	3%	6% *	4%	- *	1% *
Vehicles (Subnet)	7%	5% *	6%	10% *	7%	6% *	7% *
Unclean/ smelly vehicles	6%	5% *	6%	10% *	7%	6% *	7% *
Ease/ Convenience (Subnet)	4%	2% *	3%	4% *	3%	- *	1% *
Experiences (Subnet)	3%	4% *	4%	10% H*	7%	2% *	1% *
Poor customer service	3%	2% *	3%	6% *	6%	4% *	2% *
Neutral (Net)	9%	3% *	5%	6% *	3%	6% *	3% *
Don't use it enough	6%	- *	1%	- *	-	- *	- *
Don't know/ Not Applicable	8%	9% *	7%	14% *	12%	15% *	12% *

14. Why would you say that you are ['unsatisfied' / 'neither unsatisfied or satisfied' / 'satisfied'] with your taxi experience overall? Base: Have used Taxi (n=585)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Uber Services

Uber Experience	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etoibicoke	North York	Scarborough	Toronto	York
	(n=210)	(n=116)	(n=77*)	(n=17**)	(n=101)	(n=109)	(n=3**)	(n=26**)	(n=55*)	(n=51*)	(n=71*)	(n=4**)
	A	B	C	D	E	F	G	H	I	J	K	
Positive (Net)	82%	83%	79% *	94% **	77%	87%	69% **	76% **	76% *	85% *	87% *	100% **
Fares (Subnet)	37%	37%	34% *	54% **	36%	39%	34% **	35% **	31% *	35% *	42% *	75% **
Affordable/ reasonable price	19%	17%	16% *	42% **	20%	18%	34% **	19% **	18% *	16% *	18% *	50% **
Cheaper than other methods of transport	14%	14%	14% *	12% **	12%	16%	- **	8% **	13% *	14% *	17% *	25% **
Like the payment method/ APP	9%	10%	9% *	6% **	7%	12%	- **	8% **	4% *	10% *	15% H*	- **
Ease/Convenience (Subnet)	29%	30%	26% *	29% **	23%	34%	34% **	27% **	28% *	25% *	34% *	- **
Convenient/ easy to use	15%	19%	10% *	12% **	11%	19%	34% **	12% **	17% *	17% *	14% *	- **
Quick service/ efficient	11%	9%	11% *	18% **	7%	15%	- **	15% **	11% *	8% *	13% *	- **
Drivers (Subnet)	23%	22%	15% *	65% **	24%	23%	- **	30% **	29% *	20% *	21% *	- **
Friendly/ polite drivers	19%	19%	11% *	53% **	19%	19%	- **	23% **	24% *	18% *	16% *	- **
Good/ safe drivers	5%	4%	6% *	6% **	4%	6%	- **	8% **	5% *	2% *	7% *	- **
Good idea/ good service/ option	16%	17%	17% *	6% **	16%	16%	35% **	8% **	20% *	24% J*	10% *	25% **
Previous Experience (Subnet)	15%	17%	13% *	6% **	15%	15%	- **	11% **	15% *	14% *	18% *	- **
Good experience/ no problems/issues	13%	16%	10% *	6% **	14%	13%	- **	8% **	13% *	14% *	17% *	- **
Cars (Subnet)	10%	9%	8% *	29% **	8%	13%	- **	15% **	5% *	2% *	20% HI*	- **
Cars are clean/ in good condition	10%	8%	8% *	29% **	8%	12%	- **	15% **	5% *	2% *	18% HI*	- **
Good customer service	8%	7%	8% *	12% **	7%	8%	- **	4% **	3% *	14% *	9% *	- **
Reliability (Subnet)	6%	5%	4% *	23% **	6%	6%	- **	12% **	4% *	6% *	7% *	- **
Other satisfied mentions	5%	4%	8% *	- **	3%	7%	- **	11% **	4% *	4% *	5% *	- **

15. Why would you say that you are ['unsatisfied' / 'neither unsatisfied or satisfied' / 'satisfied'] with your Uber experience overall? Base: Have used Uber (n=210)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Uber Services

Uber Experience	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=210)	(n=116)	(n=77*)	(n=17**)	(n=101)	(n=109)	(n=3**)	(n=26**)	(n=55*)	(n=51*)	(n=71*)	(n=4**)
		A	B	C	D	E	F	G	H	I	J	K
Negative (Net)	6%	6%	7% *	- **	5%	7%	- **	12% **	4% *	4% *	7% *	- **
Drivers (Subnet)	3%	5%	1% *	- **	2%	4%	- **	12% **	2% *	- *	3% *	- **
Reckless/ unsafe drivers	2%	3%	1% *	- **	2%	2%	- **	4% **	2% *	- *	3% *	- **
Drivers are rude/ have bad attitudes	1%	2%	- *	- **	-	2%	- **	8% **	- *	- *	- *	- **
Not knowledgeable	1%	1%	- *	- **	-	1%	- **	4% **	- *	- *	- *	- **
Fares (Subnet)	1%	2%	1% *	- **	1%	2%	- **	4% **	2% *	- *	1% *	- **
Expensive	1%	2%	- *	- **	-	2%	- **	4% **	2% *	- *	- *	- **
Concerns About Service/Company (Subnet)	1%	-	3% *	- **	2%	-	- **	- **	- *	2% *	1% *	- **
Not licensed/ unregulated	1%	-	3% *	- **	2%	-	- **	- **	- *	2% *	1% *	- **
Ease/ Convenience (Subnet)	1%	1%	- *	- **	-	1%	- **	4% **	- *	- *	- *	- **
Inconvenient	1%	1%	- *	- **	-	1%	- **	4% **	- *	- *	- *	- **
Poor customer service	1%	1%	- *	- **	-	1%	- **	4% **	- *	- *	- *	- **
Other unsatisfied mentions	1%	1%	1% *	- **	-	2%	- **	- **	- *	2% *	1% *	- **
Neutral (Net)	3%	2%	6% *	- **	5%	2%	- **	- **	2% *	2% *	7% *	- **
Don't use it enough	1%	1%	3% *	- **	2%	1%	- **	- **	2% *	2% *	1% *	- **
Other neutral	1%	1%	3% *	- **	2%	1%	- **	- **	- *	- *	4% *	- **
Don't know/ Not Applicable	12%	13%	13% *	6% **	17%	8%	31% **	16% **	22% J*	15% J*	1% *	- **

15. Why would you say that you are ['unsatisfied' / 'neither unsatisfied or satisfied' / 'satisfied'] with your Uber experience overall? Base: Have used Uber (n=210)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Uber Services

Uber Experience	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=210)	(n=52*)	(n=134)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Satisfied (Net)	82%	77% *	79%	76% *	80%	74% *	80%
Fares (Subnet)	37%	21% *	30%	38% *	36%	16% *	28%
Affordable/ reasonable price	19%	8% *	14%	26% H*	22%	8% *	11%
Cheaper than other methods of transportation	14%	14% *	12%	9% *	10%	7% *	13%
Like the payment method/ APP	9%	2% *	8%	14% *	10%	3% *	5%
Ease/Convenience (Subnet)	29%	14% *	25%	23% *	32% H	8% *	17%
Convenient/ easy to use	15%	6% *	10%	12% *	16%	5% *	10%
Quick service/ efficient	11%	4% *	10%	7% *	12%	3% *	4%
Drivers (Subnet)	23%	16% *	17%	28% *	25%	15% *	17%
Friendly/ polite drivers	19%	14% *	15%	19% *	21%	11% *	12%
Good/ safe drivers	5%	2% *	3%	10% *	8%	5% *	5%
Good idea/ good service/ option	16%	23% *	19%	16% *	18%	23% *	20%
Previous Experience (Subnet)	15%	12% *	15%	10% *	15%	10% *	15%
Good experience/ no problems/issues	13%	10% *	14%	10% *	14%	10% *	14%
Cars (Subnet)	10%	6% *	8%	8% *	10%	3% *	7%
Cars are clean/ in good condition	10%	6% *	8%	8% *	10%	3% *	7%
Good customer service	8%	12% *	7%	14% *	11%	13% *	9%
Reliability (Subnet)	6%	4% *	4%	2% *	4%	7% *	6%
Other satisfied mentions	5%	6% *	7%	7% *	5%	5% *	5%

15. Why would you say that you are ['unsatisfied' / 'neither unsatisfied or satisfied' / 'satisfied'] with your Uber experience overall? Base: Have used Uber (n=210)

SATISFACTION WITH TRANSPORTATION SERVICES

Reasons for Satisfaction With Uber Services

Uber Experience	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=210)	(n=52*)	(n=134)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Negative (Net)	6%	4% *	8%	2% *	4%	2% *	5%
Drivers (Subnet)	3%	4% *	4%	- *	2%	2% *	3%
Reckless/ unsafe drivers	2%	2% *	2%	- *	2%	2% *	2%
Drivers are rude/ have bad attitudes	1%	2% *	1%	- *	-	- *	1%
Not knowledgeable	1%	- *	1%	- *	-	- *	-
Fares (Subnet)	1%	- *	1%	- *	1%	- *	-
Expensive	1%	- *	-	- *	-	- *	-
Concerns About Service/Company (Subnet)	1%	- *	1%	- *	2%	- *	1%
Not licensed/ unregulated	1%	- *	1%	- *	2%	- *	1%
Ease/ Convenience (Subnet)	1%	- *	-	- *	-	- *	-
Inconvenient	1%	- *	-	- *	-	- *	-
Poor customer service	1%	- *	-	- *	-	- *	-
Other unsatisfied mentions	1%	- *	1%	2% *	1%	- *	1%
Neutral (Net)	3%	- *	1%	2% *	2%	3% *	2%
Don't use it enough	1%	- *	1%	- *	-	2% *	1%
Other neither satisfied or unsatisfied mentions	1%	- *	-	2% *	1%	2% *	1%
Don't know/ Not Applicable	12%	21% D*	15%	24% H*	16%	24% L*	17%

15. Why would you say that you are ['unsatisfied' / 'neither unsatisfied or satisfied' / 'satisfied'] with your Uber experience overall? Base: Have used Uber (n=210)

SATISFACTION WITH TRANSPORTATION SERVICES

Importance of Factors in Vehicle For Hire Services

- Female and older residents are more likely to feel each factor is important. Older residents are particularly more likely to feel that adequate insurance/ liability coverage is important.
- Residents of York are more likely to feel courteousness of the driver important.

Important (8-10)	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
	(n=1004)	(n=300)	(n=375)	(n=329)	(n=469)	(n=535)	(n=47*)	(n=129)	(n=229)	(n=233)	(n=320)	(n=46*)
		A	B	C	D	E	F	G	H	I	J	K
Personal safety	83%	77%	85% A	87% A	77%	89% D	87% *	77%	81%	86% G	84%	86% *
Safe driving behaviour	82%	75%	84% A	87% A	75%	89% D	85% *	76%	80%	83%	84%	89% *
Cost of service	78%	75%	79%	80%	73%	83% D	85% *	75%	77%	76%	80%	80% *
Knowledge of area (road network, key venues, etc.)	76%	68%	79% A	79% A	67%	83% D	79% *	70%	72%	78%	77%	84% *
Speed of pick up	74%	68%	76% A	77% A	68%	79% D	72% *	73%	74%	74%	72%	80% *
Cleanliness of vehicle	73%	67%	72%	79% AB	65%	80% D	72% *	69%	70%	73%	76%	80% *
Ease of payment	72%	66%	74% A	74% A	64%	78% D	72% *	68%	71%	68%	75%	76% *
Courteousness of driver	70%	60%	73% A	77% A	64%	76% D	72% *	67%	68%	72%	70%	84% GHJ*
Adequate insurance/ liability coverage	69%	55%	71% A	81% AB	65%	73% D	74% *	64%	69%	70%	69%	78% *
Speed of trip	67%	64%	71%	66%	61%	72% D	64% *	69%	67%	69%	65%	65% *
Use of technology or mobile apps	38%	41%	39%	33%	34%	41% D	26% *	37%	37%	42% F	38%	39% *

16. When you use a service such as a taxi, limo or Uber, how important are each of the following to you using a scale of 1 to 10 where 1 means not important at all and 10 means very important? Base: All respondents (n=1004)

SATISFACTION WITH TRANSPORTATION SERVICES

Importance of Factors in Vehicle For Hire Services

- Uber users are generally less likely to feel each factor is important to them, with the exception of the use of technology and mobile apps which both Uber and taxi users consider to be more important.

Important (8-10)	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
	(n=1004)	(n=97*)	(n=280)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Personal safety	83%	77% *	82%	65% *	68%	62% *	73%
Safe driving behaviour	82%	77% *	81%	65% *	67%	65% *	74%
Cost of service	78%	75% *	78%	69% *	69%	65% *	73%
Knowledge of area (road network, key venues, etc.)	76%	80% *	79%	65% *	65%	70% *	74%
Speed of pick up	74%	73% *	75%	67% *	68%	62% *	70%
Cleanliness of vehicle	73%	73% *	76%	62% *	65%	65% *	71%
Ease of payment	72%	66% *	73%	62% *	65%	59% *	65%
Courteousness of driver	70%	71% *	72%	62% *	63%	55% *	66%
Adequate insurance/ liability coverage	69%	66% *	66%	51% *	53%	52% *	60%
Speed of trip	67%	69% *	70%	62% *	61%	56% *	66%
Use of technology or mobile apps	38%	51% D*	45% D	64% *	56%	46% *	48%

16. When you use a service such as a taxi, limo or Uber, how important are each of the following to you using a scale of 1 to 10 where 1 means not important at all and 10 means very important? Base: All respondents (n=1004)

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Taxi Services

- Older residents are more satisfied with every aspect of taxi service except for the use of technology or mobile apps where impressions are the same across all age groups.
- Female residents are more likely to be satisfied with personal safety.

% Satisfied (Top3Box)	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Base: Have used Taxi	(n=585)	(n=201)	(n=221)	(n=163)	(n=266)	(n=319)	(n=22**)	(n=77*)	(n=122)	(n=123)	(n=217)	(n=24**)
		A	B	C	D	E	F	G	H	I	J	K
Personal safety	64%	56%	65%	72% A	58%	68% D	62% **	64% *	62%	65%	63%	66% **
Ease of payment	58%	47%	60% A	70% AB	56%	60%	58% **	54% *	56%	58%	61%	62% **
Knowledge of area (road network, key venues, etc.)	58%	54%	59%	60%	55%	60%	44% **	55% *	56%	63%	58%	57% **
Safe driving behaviour	57%	52%	57%	62%	53%	60%	67% **	61% *	55%	56%	55%	62% **
Adequate insurance/ liability coverage	57%	45%	57% A	71% AB	55%	58%	58% **	59% *	48%	58%	57%	78% **
Speed of trip	55%	48%	57%	63% A	52%	58%	68% **	57% *	49%	54%	58%	54% **
Speed of pick up	55%	46%	59% A	60% A	50%	59%	63% **	57% *	54%	55%	53%	57% **
Cleanliness of vehicle	51%	47%	48%	60% AB	48%	54%	54% **	48% *	44%	52%	55%	57% **
Courteousness of driver	49%	43%	48%	58% AB	47%	50%	31% **	45% *	48%	50%	50%	62% **
Cost of service	36%	27%	39% A	43% A	37%	35%	31% **	41% *	33%	37%	35%	33% **
Use of technology or mobile apps	33%	33%	33%	33%	32%	34%	22% **	31% *	37%	35%	31%	33% **

17. Thinking about when you use a taxi service, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied?

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Taxi Services

- UberX users are less satisfied with every aspect of taxi service.

% Satisfied (Top3Box)	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
Base: Have used Taxi	(n=585)	(n=97*)	(n=280)	(n=51*)	(n=106)	(n=52*)	(n=100*)
		B	C	F	G	J	K
Personal safety	64%	67% *	64%	55% *	49%	61% *	60% *
Ease of payment	58%	66% *	58%	39% *	37%	58% L*	53% L*
Knowledge of area (road network, key venues, etc.)	58%	60% *	57%	44% *	43%	54% *	53% *
Safe driving behaviour	57%	63% *	57%	49% *	44%	59% *	55% *
Adequate insurance/ liability coverage	57%	65% *	60%	50% *	50%	59% *	54% *
Speed of trip	55%	59% *	54%	46% *	42%	50% *	53% *
Speed of pick up	55%	57% *	53%	45% *	44%	48% *	49% *
Cleanliness of vehicle	51%	53% *	52%	48% *	45%	52% *	48% *
Courteousness of driver	49%	53% *	49%	45% *	36%	48% L*	45% L*
Cost of service	36%	45% *	37%	39% *	29%	44% L*	36% *
Use of technology or mobile apps	33%	49% CD*	35%	43% H*	34%	42% L*	37% L*

17. Thinking about when you use a taxi service, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied?

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Limo Services

- Older residents are more likely to be satisfied with every area of service. Female users are more likely to be satisfied with safe driving behaviour and the speed of pick up.

% Satisfied (Top3Box)	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Base: Have used Limo Services	(n=178)	(n=33**)	(n=48*)	(n=97*)	(n=95*)	(n=83*)	(n=9**)	(n=18**)	(n=35*)	(n=36*)	(n=77*)	(n=3**)
		A	B	C	D	E	F	G	H	I	J	K
Cleanliness of vehicle	85%	57% *	83% A*	95% AB*	81% *	89% *	76% **	100% **	80% *	81% *	85% *	100% **
Speed of trip	82%	63% *	77% *	91% AB*	78% *	86% *	76% **	100% **	79% *	69% *	84% *	100% **
Personal safety	81%	66% *	75% *	89% AB*	76% *	87% *	66% **	94% **	83% *	78% *	79% *	100% **
Courteousness of driver	80%	60% *	71% *	92% AB*	77% *	84% *	76% **	95% **	77% *	78% *	79% *	100% **
Safe driving behaviour	80%	57% *	77% *	90% AB*	74% *	88% D*	76% **	94% **	80% *	72% *	80% *	100% **
Speed of pick up	80%	54% *	83% A*	88% A*	71% *	90% D*	76% **	100% **	74% *	72% *	81% *	100% **
Knowledge of area (road network, key venues, etc.)	77%	60% *	67% *	89% AB*	74% *	82% *	76% **	95% **	82% *	64% *	76% *	100% **
Ease of payment	77%	51% *	73% *	89% AB*	73% *	83% *	65% **	94% **	82% *	66% *	76% *	100% **
Adequate insurance/ liability coverage	70%	42% *	67% A*	81% AB*	67% *	73% *	65% **	94% **	71% *	61% *	67% *	100% **
Cost of service	52%	37% *	46% *	60% A*	52% *	52% *	32% **	83% **	51% *	47% *	48% *	66% **
Use of technology or mobile apps	48%	37% *	54% *	48% *	42% *	54% *	32% **	61% **	54% *	53% *	40% *	67% **

18. Thinking about when you use a limo service, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied?

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Limo Services

% Satisfied (Top3Box)	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
Base: Have used Limo Services	(n=178)	(n=30**)	(n=72*)	(n=18**)	(n=28**)	(n=18**)	(n=28**)
		B	C	F	G	J	K
Cleanliness of vehicle	85%	76% **	79% *	66% **	71% **	72% **	75% **
Speed of trip	82%	79% **	77% *	77% **	78% **	77% **	74% **
Personal safety	81%	83% **	79% *	66% **	71% **	83% **	82% **
Courteousness of driver	80%	83% **	75% *	77% **	78% **	83% **	75% **
Safe driving behaviour	80%	70% **	77% *	55% **	64% **	66% **	71% **
Speed of pick up	80%	73% **	75% *	66% **	67% **	61% **	68% **
Knowledge of area (road network, key venues, etc.)	77%	73% **	73% *	72% **	71% **	71% **	74% **
Ease of payment	77%	76% **	72% *	56% **	64% **	72% **	67% **
Adequate insurance/ liability coverage	70%	70% **	68% *	55% **	61% **	66% **	67% **
Cost of service	52%	53% **	54% *	50% **	54% **	60% **	60% **
Use of technology or mobile apps	48%	53% **	46% *	50% **	50% **	61% **	57% **

18. Thinking about when you use a limo service, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied?

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Uber Services

- Older Uber users are more satisfied with every aspect of service except for the use of technology or mobile apps were impressions are the same across all age groups.

% Satisfied (Top3Box)	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Base: Have used Uber	(n=210)	(n=116)	(n=77*)	(n=17**)	(n=101)	(n=109)	(n=3**)	(n=26**)	(n=55*)	(n=51*)	(n=71*)	(n=4**)
		A	B	C	D	E	F	G	H	I	J	K
Use of technology or mobile apps	76%	78%	74% *	70% **	74%	78%	69% **	73% **	74% *	77% *	80% *	50% **
Ease of payment	75%	74%	71% *	94% **	71%	78%	69% **	73% **	65% *	69% *	87% HI*	75% **
Cost of service	74%	71%	75% *	88% **	73%	75%	69% **	65% **	65% *	71% *	86% HI*	100% **
Cleanliness of vehicle	74%	72%	75% *	82% **	72%	76%	35% **	73% **	69% *	73% *	82% *	75% **
Courteousness of driver	72%	68%	77% *	82% **	68%	76%	35% **	65% **	63% *	73% *	83% H*	75% **
Speed of pick up	72%	70%	73% *	82% **	73%	71%	35% **	73% **	73% *	65% *	77% *	75% **
Safe driving behaviour	71%	70%	73% *	76% **	68%	74%	- **	69% **	69% *	69% *	79% *	75% **
Speed of trip	70%	71%	67% *	82% **	67%	74%	35% **	62% **	66% *	69% *	79% *	100% **
Personal safety	70%	68%	72% *	76% **	67%	73%	- **	69% **	63% *	63% *	82% HI*	100% **
Knowledge of area (road network, key venues, etc.)	61%	55%	68% *	71% **	57%	64%	35% **	50% **	52% *	59% *	73% H*	75% **
Adequate insurance/ liability coverage	55%	52%	60% *	58% **	58%	52%	35% **	46% **	54% *	55% *	59% *	76% **

19. Thinking about when you use a taxi service, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied?

SATISFACTION WITH TRANSPORTATION SERVICES

Satisfaction with Uber Services

% Satisfied (Top3Box)	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
Base: Have used Uber	(n=210)	(n=52*)	(n=134)	(n=58*)	(n=121)	(n=61*)	(n=112)
		B	C	F	G	J	K
Use of technology or mobile apps	76%	81% *	77%	84% *	80%	75% *	76%
Ease of payment	75%	62% *	72%	70% *	71%	64% *	71%
Cost of service	74%	73% *	73%	79% *	72%	72% *	74%
Cleanliness of vehicle	74%	73% *	74%	70% *	71%	74% *	72%
Courteousness of driver	72%	71% *	73%	72% *	71%	70% *	70%
Speed of pick up	72%	66% *	73%	72% *	70%	72% *	72%
Safe driving behaviour	71%	65% *	71%	74% *	71%	68% *	70%
Speed of trip	70%	65% *	69%	72% *	69%	67% *	67%
Personal safety	70%	66% *	69%	72% *	67%	74% *	70%
Knowledge of area	61%	62% *	65%	56% *	58%	64% *	63% L
Adequate insurance/ liability coverage	55%	60% *	57%	61% *	55%	63% *	55%

19. Thinking about when you use a taxi service, how satisfied would you say that you are with each of the following using a scale from 1 to 10 where 1 means not at all satisfied and 10 means extremely satisfied?

ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Services

- Older residents and those who reside in the old City of Toronto are more likely to know that taxi services require a taxi license to operate legally and that the City of Toronto regulates the amount of money that taxis can charge. They are also more likely to agree that Uber should have the same insurance/ liability as taxis

Strongly/Somewhat agree	Total	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
		A	B	C	D	E	F	G	H	I	J	K
Taxi services in the City of Toronto require a taxi license to operate legally	79%	73%	79%	87% AB	76%	82% D	85% *	77%	78%	74%	84% I	82% *
Uber should have the same insurance/ liability coverage as taxis are required to have.	75%	65%	73% A	85% AB	73%	76%	74% *	71%	71%	74%	79% H	78% *
Since Uber services are less regulated than taxi services, they can provide service for a lower cost.	63%	61%	64%	64%	66%	61%	72% *	60%	64%	64%	60%	68% *
The City of Toronto regulates the amount of money that taxis can charge customers	62%	54%	65% A	66% A	66% E	58%	49% *	57%	61% K	63% K	68% FGK	44% *
Having Uber in the market offers the type of competition in taxi and limo services that Toronto needs.	60%	61%	62%	57%	63%	58%	56% *	56%	60%	64%	60%	61% *
Taxi drivers in the City of Toronto are required to take various types of training such as customer service training, and training about how to navigate the city.	59%	55%	60%	61%	59%	59%	62% *	55%	61%	60%	57%	61% *
The regulations on taxi and limo services in the City of Toronto limit competition in the vehicle-for-hire industry which is not in the best interests of customers.	57%	54%	60%	57%	63% E	52%	47% *	54%	57%	63% F	56%	55% *

21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Services

- Younger residents are more likely to agree that even though there is regulation on taxi and limo services it hasn't created a service that's better than what Uber offers or that what Uber offers is the way of the future and shouldn't be hindered by unnecessary regulation.
- Younger residents as well as residents of North York and Scarborough are also more likely to think that Uber drivers are required to take various types of training and that the City regulates the amount that Uber can charge.

Strongly/Somewhat agree	Total	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
		A	B	C	D	E	F	G	H	I	J	K
The regulations on taxi and limo services in the City of Toronto serve more to protect taxi and limo owners than to offer the best service to consumers.	55%	53%	58%	53%	58% E	52%	54% *	55%	59%	53%	53%	52% *
Taxi services are losing too much money because they can't compete with Uber	53%	50%	56%	52%	54%	52%	49% *	51%	56%	54%	50%	59% *
Even though there is regulation on taxi and limo services in the City of Toronto, it hasn't created a service that's better for consumers than what Uber offers.	53%	58% C	55% C	45%	55%	51%	54% *	53%	58% JK	56% K	49%	39% *
What Uber offers its customers is the way of the future and shouldn't be hindered by unnecessary regulation.	45%	51% C	47% C	36%	49% E	41%	43% *	44%	44%	48%	44%	37% *
Uber in the City of Toronto require a taxi license to operate legally	39%	35%	44% A	38%	39%	40%	32% *	42%	41%	41%	37%	37% *
Uber drivers in the City of Toronto are required to take various types of training such as customer service training, and training about how to navigate the city.	39%	40% C	43% C	31%	38%	39%	26% *	38%	44% FJK	47% FJK	33%	26% *
The City of Toronto regulates the amount of money that Uber can charge customers	27%	29% C	31% C	20%	27%	27%	13% *	27%	33% FJ	35% FJ	20%	22% *

21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Services

- Taxi, UberX and UberTaxi users are more likely to agree that having Uber offers the type of competition that taxis/limos need, that taxi drivers are required to take various types of training and that regulations on taxis/limos limit competition in the industry.
- Taxi users are also more likely to agree that the City regulates the amount of money that taxis can charge, while UberX users are less likely to feel that Uber should have the same insurance/ liability coverage as taxis.

Strongly/Somewhat agree	Total	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
		B	C	F	G	J	K
Taxi services in the City of Toronto require a taxi license to operate legally	79%	78% *	83%	65% *	73%	69% *	79%
Uber should have the same insurance/ liability coverage as taxis are required to have.	75%	80% *	75%	61% *	62%	67% *	75% L
Since Uber services are less regulated than taxi services, they can provide service for a lower cost.	63%	62% *	66%	67% *	62%	66% *	70%
The City of Toronto regulates the amount of money that taxis can charge customers	62%	70% D*	70% D	66% *	64%	72% *	73%
Having Uber in the market offers the type of competition in taxi and limo services that Toronto needs.	60%	64% *	68% D	76% *	78%	65% *	77%
Taxi drivers in the City of Toronto are required to take various types of training such as customer service training, and training about how to navigate the city.	59%	66% *	64% D	67% *	63%	68% *	70%
The regulations on taxi and limo services in the City of Toronto limit competition in the vehicle-for-hire industry which is not in the best interests of customers.	57%	66% D*	65% D	76% *	73%	70% *	74%

21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=1004)

ATTITUDES AND OPINIONS

Attitudes Towards Uber and Taxi Services

- UberX and UberTaxi and to a lesser extent taxi users are more likely to agree to every statement.

Strongly/Somewhat agree	Total	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
		B	C	F	G	J	K
The regulations on taxi and limo services in the City of Toronto serve more to protect taxi and limo owners than to offer the best service to consumers.	55%	68% D*	62% D	84% *	77%	80% *	76%
Taxi services are losing too much money because they can't compete with Uber	53%	64% D*	58% D	60% *	65%	65% *	71%
Even though there is regulation on taxi and limo services in the City of Toronto, it hasn't created a service that's better for consumers than what Uber offers.	53%	64% D*	60% D	79% *	78%	78% *	78%
What Uber offers its customers is the way of the future and shouldn't be hindered by unnecessary regulation.	45%	60% D*	54% D	81% *	79%	76% *	75%
Uber in the City of Toronto require a taxi license to operate legally	39%	61%CD*	47% D	44% *	40%	54% L*	49% L
Uber drivers in the City of Toronto are required to take various types of training such as customer service training, and training about how to navigate the city.	39%	49% D*	45% D	58% *	56%	62% L*	61% L
The City of Toronto regulates the amount of money that Uber can charge customers	27%	39% D*	31%	45% H*	40% H	52% L*	48% L

21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=1004)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Uber (Among Users)

- Female Uber users are more likely to agree that the cheaper cost is one the main reasons they use the service, while male users feel that the ability to ride in a personal care is one of the main reasons they use the service.

Strongly/Somewhat agree	Total	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
		A	B	C	D	E	F	G	H	I	J	K
The cheaper cost of Uber is one of the main reasons I use the service	84%	87%	77% *	94% **	77%	90% D	69% **	81% **	82% *	82% *	87% *	100% **
The ability to order a vehicle through the Uber mobile app is one of the main reasons I use the service	83%	83%	84% *	81% **	79%	87%	69% **	85% **	76% *	84% *	88% *	76% **
The overall quality of the mobile app for Uber is one of the main reasons I use the service	77%	74%	83% *	69% **	71%	82%	69% **	73% **	74% *	78% *	81% *	50% **
The quality of service is one of the main reasons I use Uber	75%	75%	74% *	81% **	74%	76%	69% **	73% **	73% *	75% *	79% *	76% **
The ability to pay for my trip through the Uber mobile app is one of the main reasons I use the service	75%	76%	75% *	63% **	70%	79%	69% **	74% **	71% *	77% *	78% *	50% **
The ability to track the vehicle through the Uber mobile app is one of the main reasons I use the service	74%	75%	75% *	69% **	74%	74%	69% **	81% **	65% *	74% *	83% H*	25% **
I have switched from using taxis to using Uber	67%	65%	66% *	81% **	62%	71%	69% **	57% **	67% *	65% *	73% *	50% **
The ability to ride in a personal car, instead of a taxi, is one of the main reasons I use the service	63%	62% *	60% *	83% **	72% E*	53% *	35% **	68% **	66% *	65% *	59% *	50% **

21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=210)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



ATTITUDES AND OPINIONS

Attitudes Towards Uber (Among Users)

Strongly/Somewhat agree	Total	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
		B	C	F	G	J	K
The cheaper cost of Uber is one of the main reasons I use the service	84%	75% *	81%	81% *	82%	82% *	85%
The ability to order a vehicle through the Uber mobile app is one of the main reasons I use the service	83%	77% *	82%	77% *	84%	75% *	84%
The overall quality of the mobile app for Uber is one of the main reasons I use the service	77%	67% *	75%	77% *	81%	70% *	79%
The quality of service is one of the main reasons I use Uber	75%	67% *	72%	76% *	78%	75% *	77%
The ability to pay for my trip through the Uber mobile app is one of the main reasons I use the service	75%	70% *	72%	76% *	79%	72% *	78%
The ability to track the vehicle through the Uber mobile app is one of the main reasons I use the service	74%	69% *	72%	72% *	77%	67% *	74%
I have switched from using taxis to using Uber	67%	57% *	58%	72% *	68%	65% *	68%
The ability to ride in a personal car, instead of a taxi, is one of the main reasons I use the service	63%	73% *	66%	73% *	69%	77% L*	71% *

21. Indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. If you don't know please indicate so. Base: All respondents (n=210)

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Very Small Base: under 30 (**), Small Base: under 100 (*)

GAME CHANGERS



SATISFACTION WITH TRANSPORTATION SERVICES

Impact on Taxi Usage Assuming Decline in Base Rate

- Younger residents, Taxi and Uber users would be more likely to use taxis in each of the three scenarios, while females would be more likely to use taxis if the base fare was decreased to \$3.
- Taxi and UberTaxi users are more likely to be motivated by decreased base fare prices than UberX users.

Much/Somewhat more likely	TOTAL	AGE			GENDER		REGION					
		18-34	35-54	55+	Male	Female	East York	Etobicoke	North York	Scarborough	Toronto	York
Base: Total asked (varies)		A	B	C	D	E	F	G	H	I	J	K
Decreased to \$3	55%	61% C*	61% C	43%	47%	61% D	47% **	52% *	59% *	57% *	52%	59% **
Decreased to \$3.50	48%	61% C*	54% C	28%	46%	50%	53% **	53% *	43% *	56% *	46% *	23% **
Decreased to \$4.00	24%	33% C	22%	17% *	22%	26%	14% **	35% *	25% *	30% *	21%	6% **

Much/Somewhat more likely	TOTAL	TAXI USAGE		UBER X USAGE		UBER TAXI USAGE	
		At least once a week	At least once a month	At least once a week	At least once a month	At least once a week	At least once a month
Base: Total asked (varies)		B	C	F	G	J	K
Decreased to \$3	55%	80% **	71% D*	88% **	58% *	80% **	74% *
Decreased to \$3.50	48%	68% D*	66% D*	55% **	58% *	50% **	63% *
Decreased to \$4.00	24%	39% D*	37% D*	33% **	35% *	32% **	37% *

20. The current cost to enter a taxicab is \$4.25 and increases with the time and distance of the trip. How much more likely would you be to take a taxi if....

Base: Total Asked (n=varies, approx 335)

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