

Appendix A – Ridesharing Market Research

Methodology

The survey questionnaire was designed in consultation with the City of Regina. It was programmed into an online survey platform and pre-tested to ensure the questions flowed efficiently and incorporated correct branching and skip patterns.

A random sample of panelists was invited to complete the survey from online community panel partners (Research Now and SSI) to collect feedback that is approximately representative and reflective of Regina’s population. Quota blocks were used to help facilitate representation of demographic characteristics; the data is also weighted to approximate Statistics Canada census data demographics in terms of age, gender and household income. The ride share survey was conducted between May 18th through May 28th, 2018. A total of 494 online surveys were completed with Regina residents ages 18 years and older.

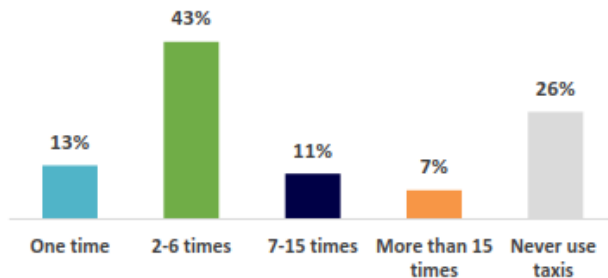
The Marketing Research and Intelligence Association policy limits statements about margins of sampling error for most online surveys. The margin of error for a comparable probability-based (e.g. telephone survey) random sample of 500 people is +/- 4.4%, with a 95% confidence interval (19 times out of 20).

Results

Use of Regina Taxi Services

7 out of 10 Used a Regina Taxi in Last Year

Q. *In the last year, how frequently have you used taxi services in Regina?*



- Seven out of ten (74%) respondents have used Regina taxi services at least once in the last year—the largest number (43%) have used a taxi 2–6 times, another 11% between 7 and 15 times and 7% more than 15 times.
- Approximately a quarter (26%) say they never use taxis.

- Ages 18-34 are most frequent taxi users—15% used a taxi more than 15 times this past year.
- Ages 55+ are most likely to “never use a taxi” (33%).

Ride Share Use

3 out of 10 Overall Have Used Ride Share

Q. Have you ever used a ride share service, such as Uber, Lyft or TappCar, in another city?

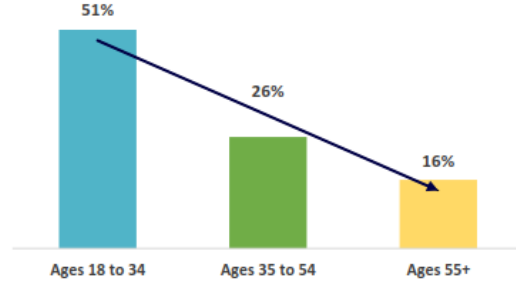


- Nearly a third (31%) of respondents have used a ride share service, such as Uber, Lyft or TappCar, in another city.

Ride Share Use by Age Group

5 out of 10 Young People Have Used Ride Share

Q. Have you ever used a ride share service in another city?



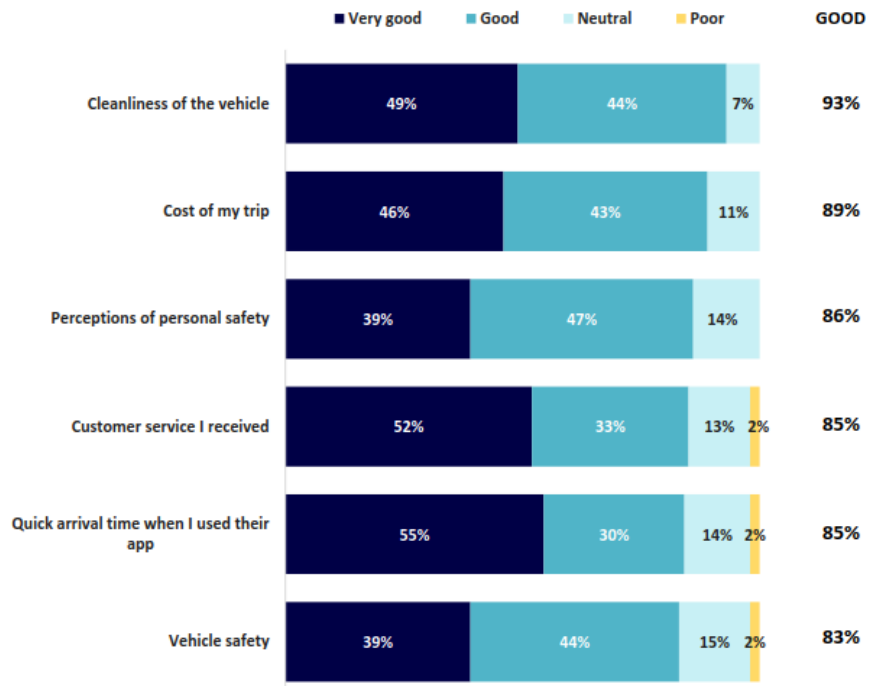
- Ages 18-34 are most likely to have used ride share—at 51%. Ride share use decreases with age to 16% of ages 55+.

Ride Share Experience

9 out of 10 Give Ride Share Experience Thumbs Up

Q. If you have used a ride share service in another city, how was your personal experience in terms of the following features?

- Overall, those who've used ride share service say the experience was a good one.
- Nine out of 10 (93%) rate the ride share's vehicle cleanliness as good (49% 'very good').
- Nine out of ten (89%) rate cost of trip as good, with close to half (46%) rating it 'very good.'
- Perception of personal safety is also positive—86% say it was good (39% 'very good').
- The large majority (85%) rate customer service as good, with over half (52%) saying it was 'very good.'
- The large majority (85%) also say quick arrival time when using the ride share app was good (55% 'very good').
- Finally, eight out of 10 (83%) rate vehicle safety as good (39% 'very good').



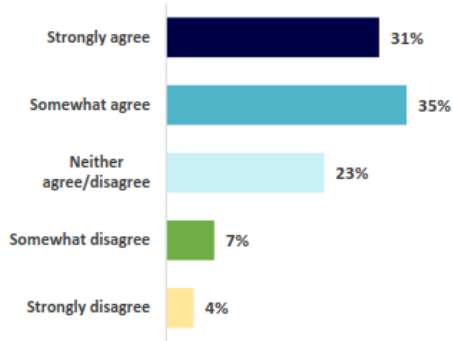
* Chart may not total 100% due to rounding

Response to Ride Share in Regina

The provincial government has recently introduced legislation that will allow ride sharing services (such as Uber, Lyft or TappCar) to operate in Saskatchewan. Ride share companies will need to adhere to provincial insurance and licensing regulations as well as local bylaws and regulations. For ride sharing companies to operate in Regina, the City must first put in place licensing regulations.

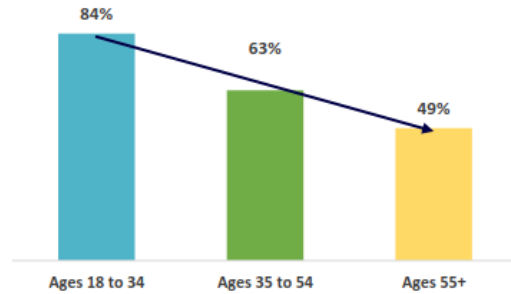
66% Overall See Value in Ride Share in Regina

Q. Do you agree there is value/benefit for you to bringing ride share service options to Regina in addition to existing taxi service?



- The majority (66%) of respondents agree they see value or benefit in bringing ride share service options to Regina. Only 11% disagree, while 23% neither agree nor disagree.

84% of Young People See Value in Ride Share in Regina

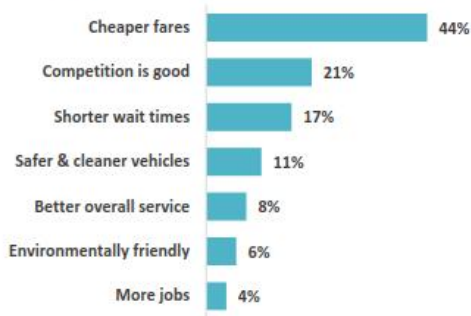


- Young people ages 18-34 are most likely to see value or benefit in bringing ride share service to Regina.

Benefits vs. Concerns

Cheaper Fares Main Benefit

Q. What are the benefits you see from ride share service coming to Regina?

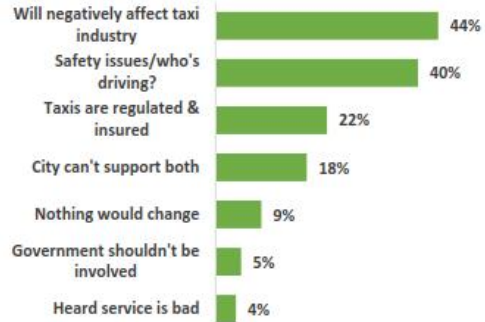


* Multiple response allowed

- Among the 66% who agree there is value/benefit in bringing ride share to Regina, the most frequently cited benefit is cheaper fares (44%).
- Approximately 21% cite competition, 17% cite shorter wait times and 11% safer and cleaner vehicles. A small number believe ride share will result in better overall service (8%), is more environmentally friendly (6%) and/or will create more jobs (4%).

Negative Impact on Taxi Industry Main Concern

Q. Why do you disagree?



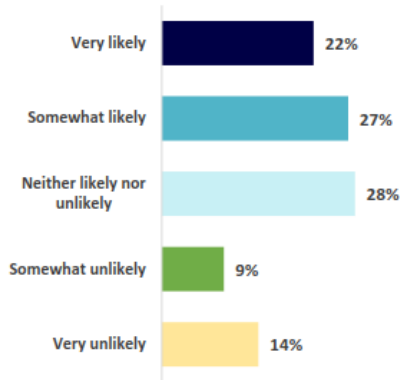
* Multiple response allowed

- Among the 11% who do not agree there is value/benefit in bringing ride share to Regina, the two most frequently cited reasons are its perceived negative impact on the city's taxi industry (44%) and safety issues related to drivers (40%).
- Approximately 21% say ride share service is not regulated and insured like taxis, 18% don't think the city can support both, 9% don't think anything will change and 4% have heard the service is bad. A few (5%) don't think the government should be involved in the issue.

Likelihood of Using Ride Share

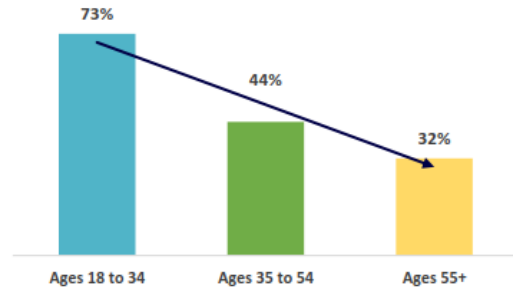
5 out of 10 Overall Likely to Use Ride Share

Q. How likely would you be to use ride sharing service?



- Approximately half (49%) of respondents are likely to use ride sharing service in Regina. Approximately a quarter (23%) are unlikely to use ride share, while 28% appear uncertain (neither likely nor unlikely).

7 out of 10 Young People Likely to Use Ride Share



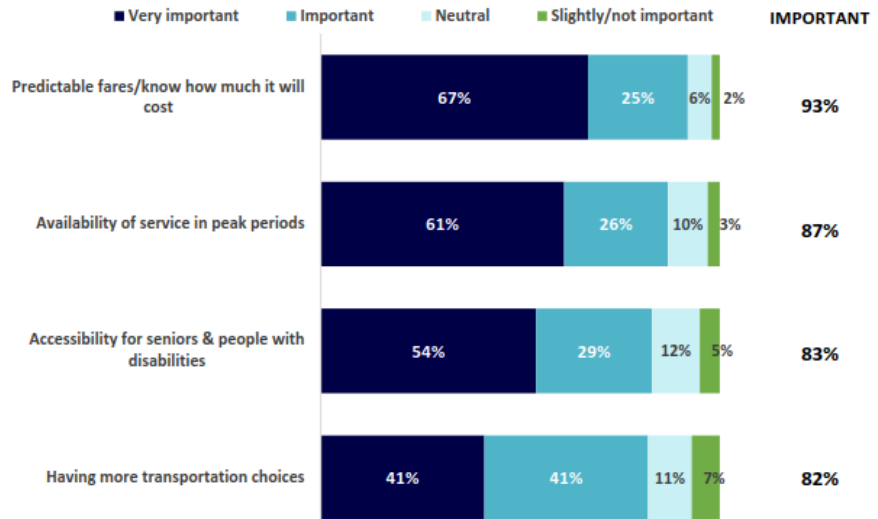
The large majority of young people ages 18-34 are likely to use ride share in Regina (73%, including 33% 'very likely').

Importance of Service

9 out of 10 Say Predictable Fares Important

Q. For ride sharing companies to operate, the City of Regina must put in place licensing regulations. To what extent are the following important considerations for you for potential ride sharing operators?

- Nine out of 10 (93%) respondents say it's important for ride share operators to have predictable fares, meaning riders need to know beforehand how much the ride share will cost.
- Nine out of 10 (87%) also say having availability of service during peak periods is an important consideration.
- Eight out of 10 (83%) say accessibility for seniors and people with disabilities is an important consideration.
- Eight out of 10 (82%) also say having more transportation choices in Regina is an important consideration.

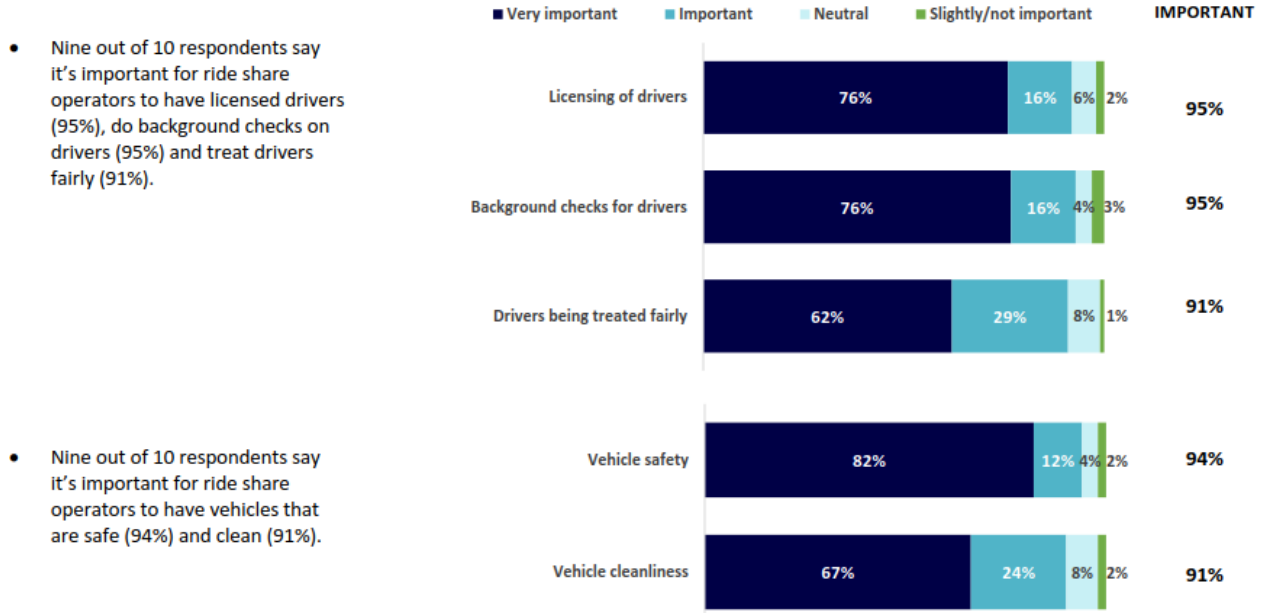


Importance of Drivers & Vehicles

Driver Licensing, Background Checks Important

Vehicle Safety & Cleanliness Important

Q. For ride sharing companies to operate, the City of Regina must put in place licensing regulations. To what extent are the following important considerations for you for potential ride sharing operators?



- Nine out of 10 respondents say it's important for ride share operators to have licensed drivers (95%), do background checks on drivers (95%) and treat drivers fairly (91%).

- Nine out of 10 respondents say it's important for ride share operators to have vehicles that are safe (94%) and clean (91%).

* Charts may not total 100% due to rounding

Ride Share Regulation

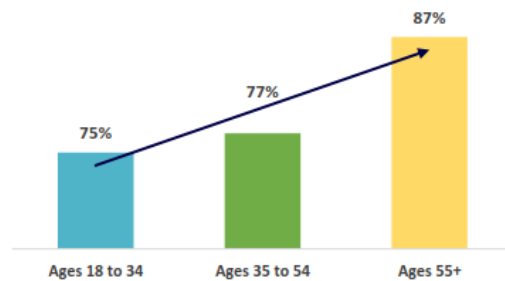
8 out of 10 Overall Think Ride Share Should Be Regulated

7 out of 10 Young People Think Ride Share Should Be Regulated

Q. Do you think ride sharing should be regulated in the same way as the taxi industry?



- The large majority (80%) of respondents think ride sharing in Regina should be regulated in the same way as the taxi industry.



- Although young people ages 18-34 are least likely to think ride sharing should be regulated, the majority nonetheless appear to support regulation.