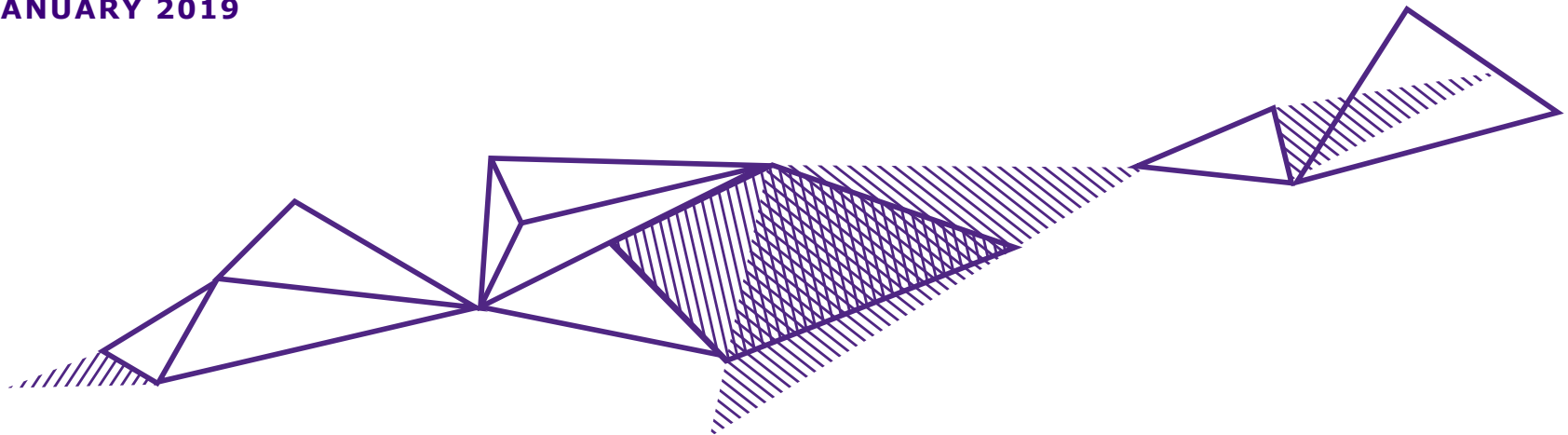


ENVIRONICS
RESEARCH

Greater Vancouver Ride Sharing Survey

PREPARED FOR: RIDESHARING NOW FOR BC

JANUARY 2019



OVERVIEW AND METHODOLOGY

Ridesharing Now for BC commissioned Environics Research to conduct a survey of Vancouver residents regarding their attitudes, opinions, and perceptions about issues related to ridesharing and potential regulations.

- A total of **600** Vancouver residents completed this online survey.
- The survey was conducted between January 11 and January 18, 2019.
- The survey data was weighted by region, age, and gender to match census data.
- In accordance with industry standards, margin or sampling error is not reported for online panel surveys.
- Results are expressed as percentages unless otherwise noted.
- Results may not add to 100% due to rounding or multiple responses. Labels for values less than or equal to three percent are not shown in stacked bar charts.

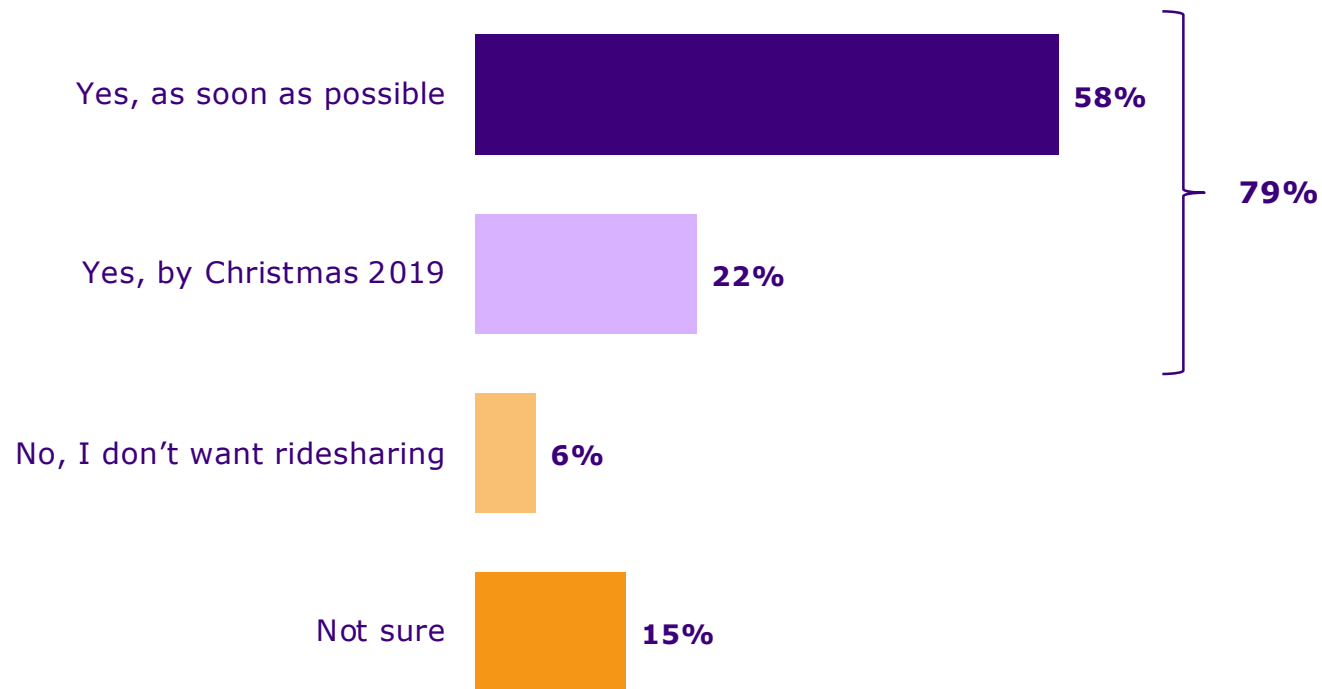
Region	Sample size
Inner Greater Vancouver	275
Outer Greater Vancouver	325
Total	600



Survey Results

RIDESHARING COMMITMENT AND DESIRED IMPLEMENTATION TIMELINE

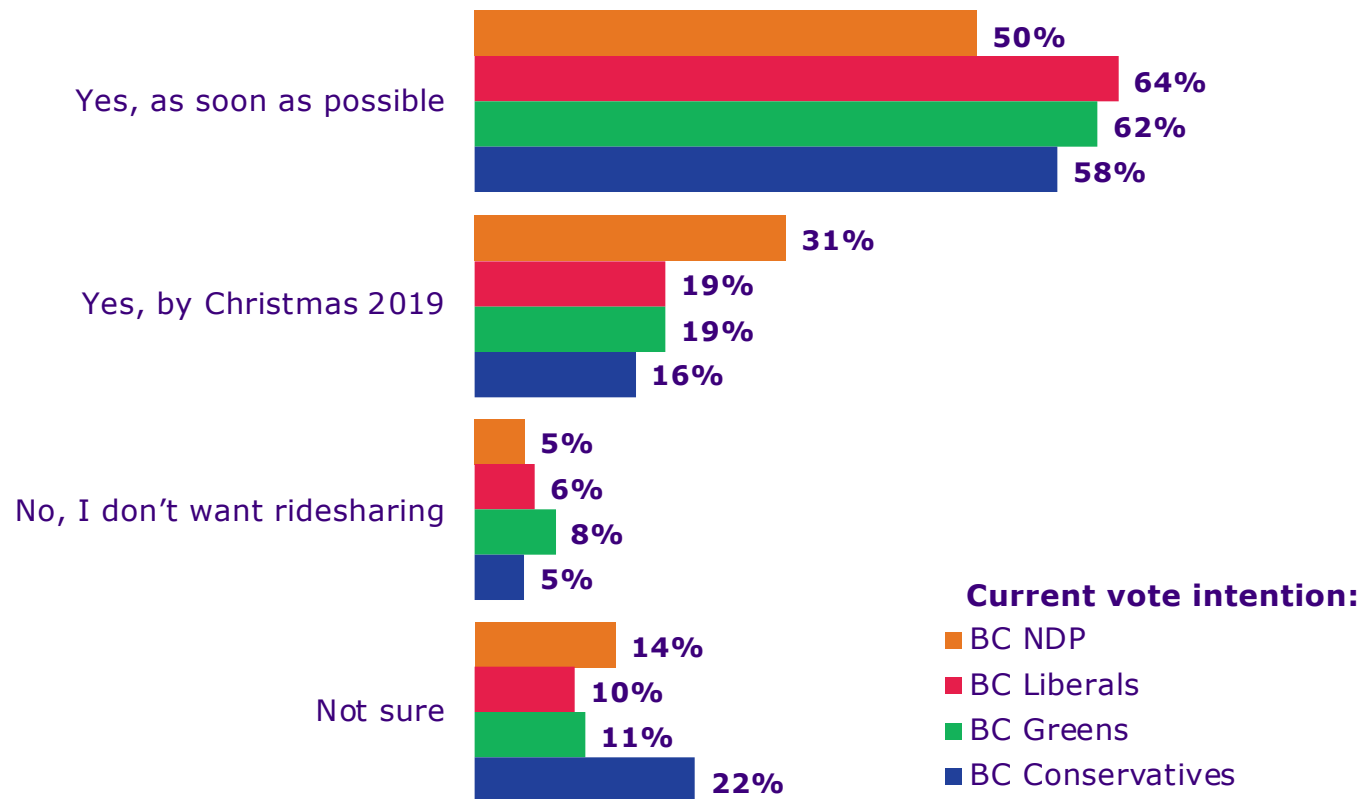
Six in ten residents want Uber and Lyft to operate in BC as soon as possible and a further two in ten want them to operate by the end of the year. Fewer than one in ten residents don't want ridesharing.



Q. Do you want Premier John Horgan to keep his commitment to allow Uber and Lyft to operate in BC:

RIDESHARING COMMITMENT BY VOTE

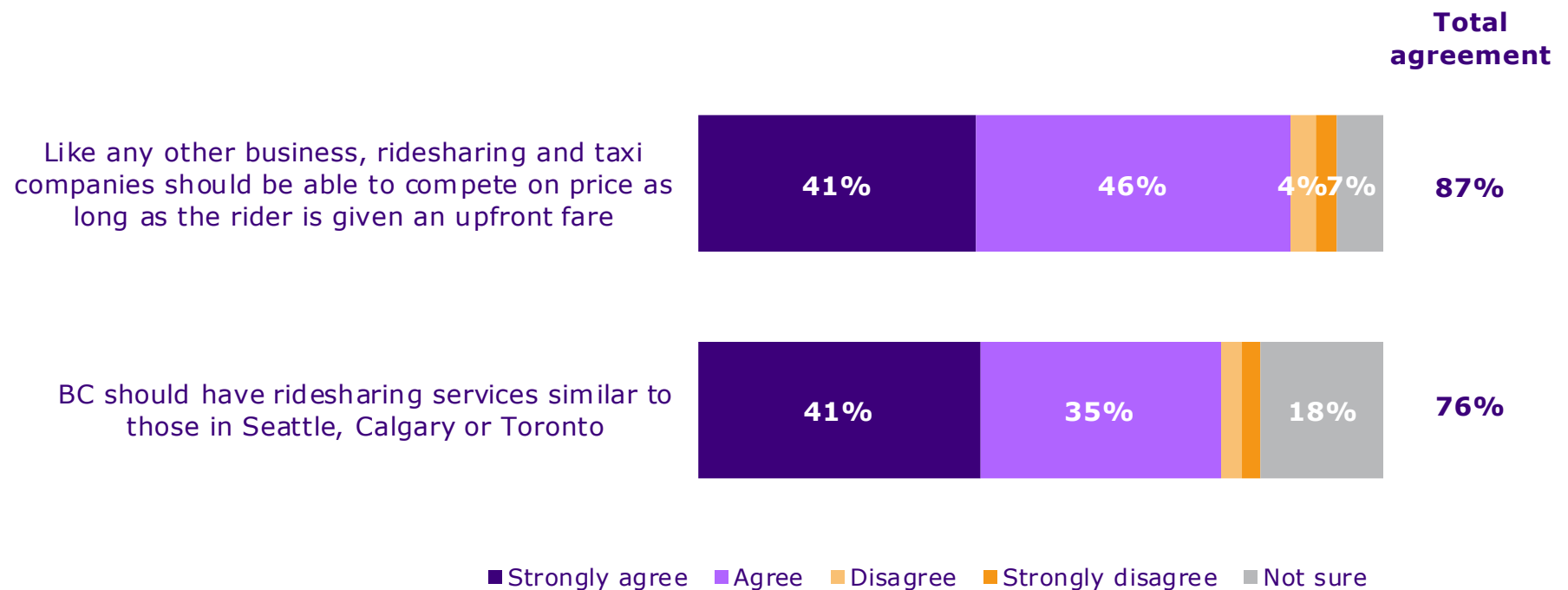
BC NDP supporters are most likely to want Horgan to keep his commitment by Christmas 2019, while those who support the BC Liberals are most likely to say it should be as soon as possible. Liberals are most likely to say it should be as soon as possible.



Q. Do you want Premier John Horgan to keep his commitment to allow Uber and Lyft to operate in BC:

ATTITUDES ABOUT RIDESHARING POLICY

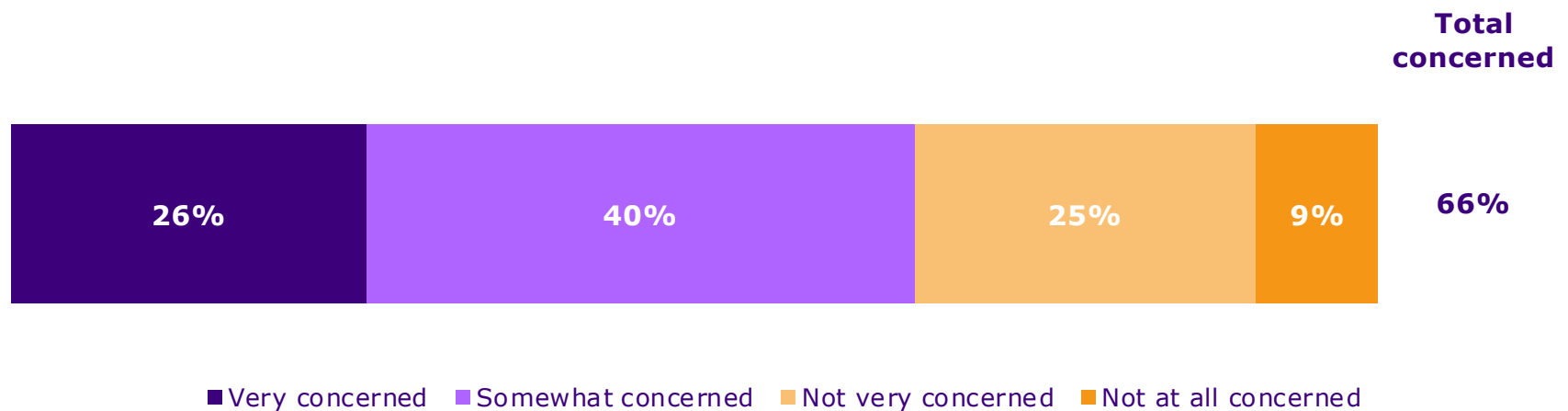
Strong majorities agree that ridesharing and taxi companies should be able to compete on price, and that BC should have ridesharing services like other major cities.



Q. To what extent do you agree or disagree with the following statements?

CONCERN ABOUT PROTECTING TAXI INDUSTRY

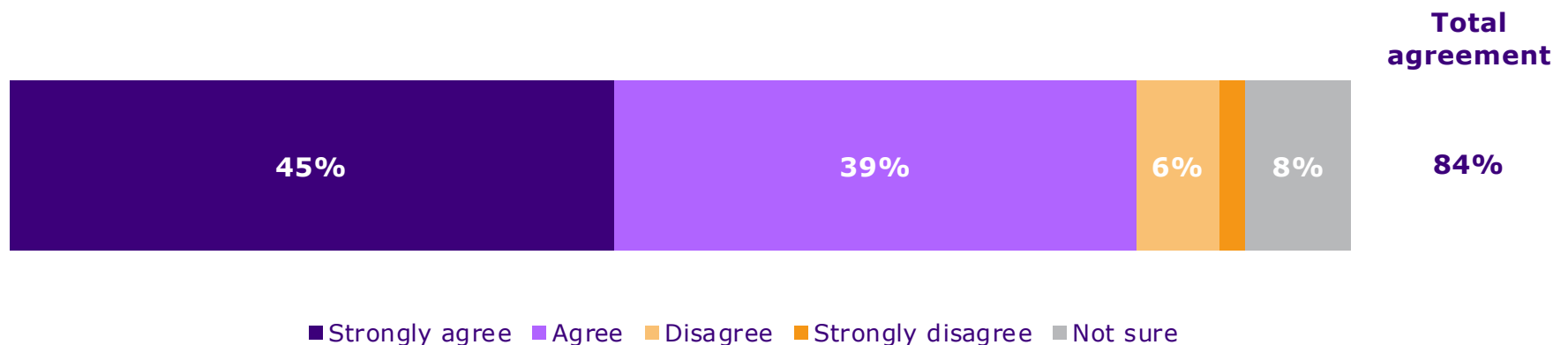
Two-thirds of Vancouver residents are concerned that the government will create rules to protect the taxi industry and make it hard for Uber and Lyft to operate.



Q. How concerned are you, if at all, that the government will create rules to protect the taxi industry and make it hard for Uber and Lyft to operate?

ATTITUDES TOWARD RIDESHARING INDUSTRY

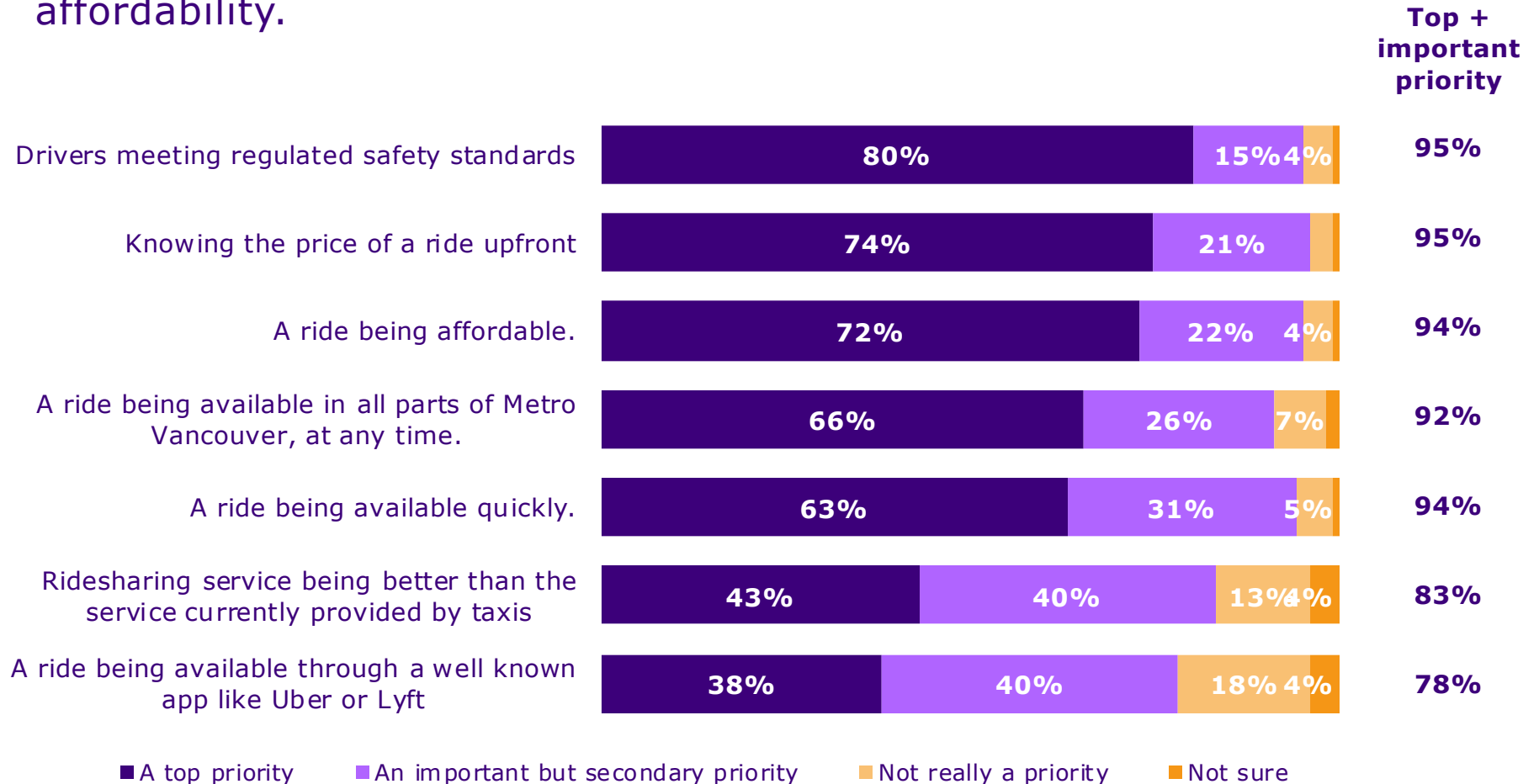
More than eight in ten agree that taxi regulations in BC have protected interests of taxi license owners.



Q. To what extent do you agree or disagree: Taxi regulations in BC have protected the interests of taxi license owners without providing acceptable levels of service. It's time for open competition.

IMPORTANCE OF RIDE ATTRIBUTES

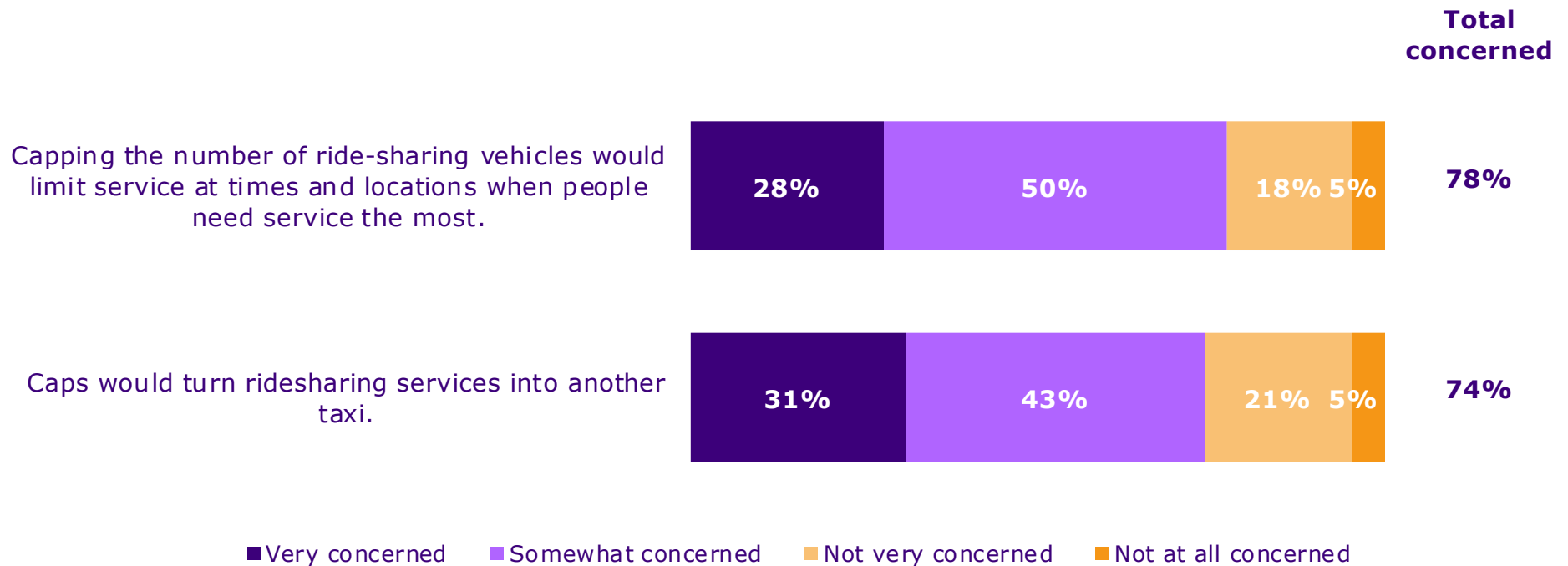
Vancouver residents say their top priorities for ridesharing include drivers meeting regulated safety standards, knowing prices upfront, and affordability.



Q. Thinking about the potential for ridesharing in BC, how important are each of the following to you?

CONCERN ABOUT VEHICLE CAPS

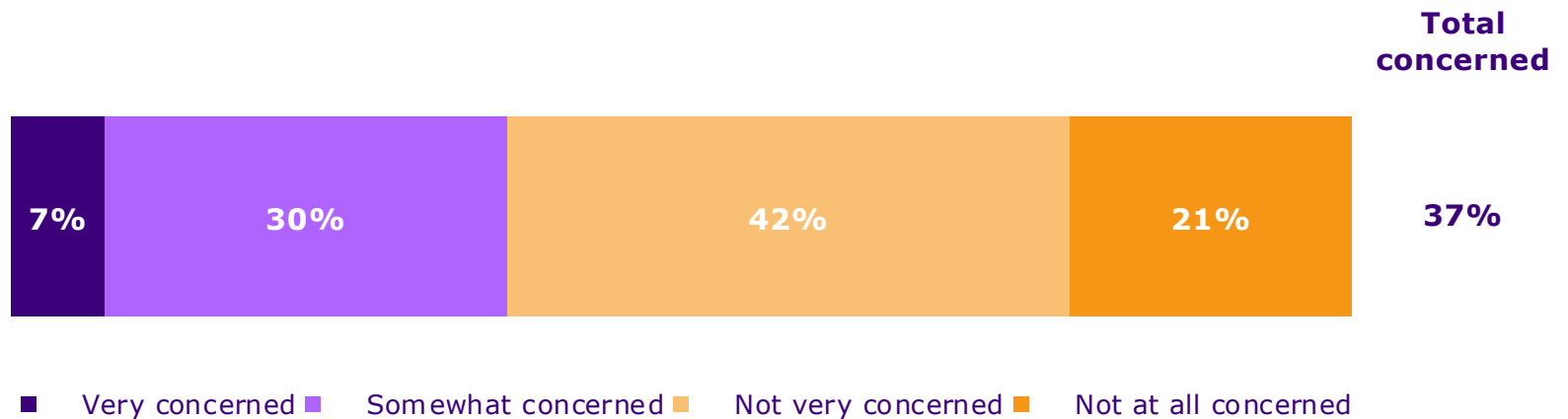
Three-quarters of Vancouver residents are concerned that vehicle caps would limit service when people need it most and turn ridesharing services into another taxi.



Q. The BC government is considering capping the number of ridesharing vehicles in each region, like the current taxi system. How concerned would you be, if at all, about the following:

CONCERN ABOUT INCREASED CONGESTION

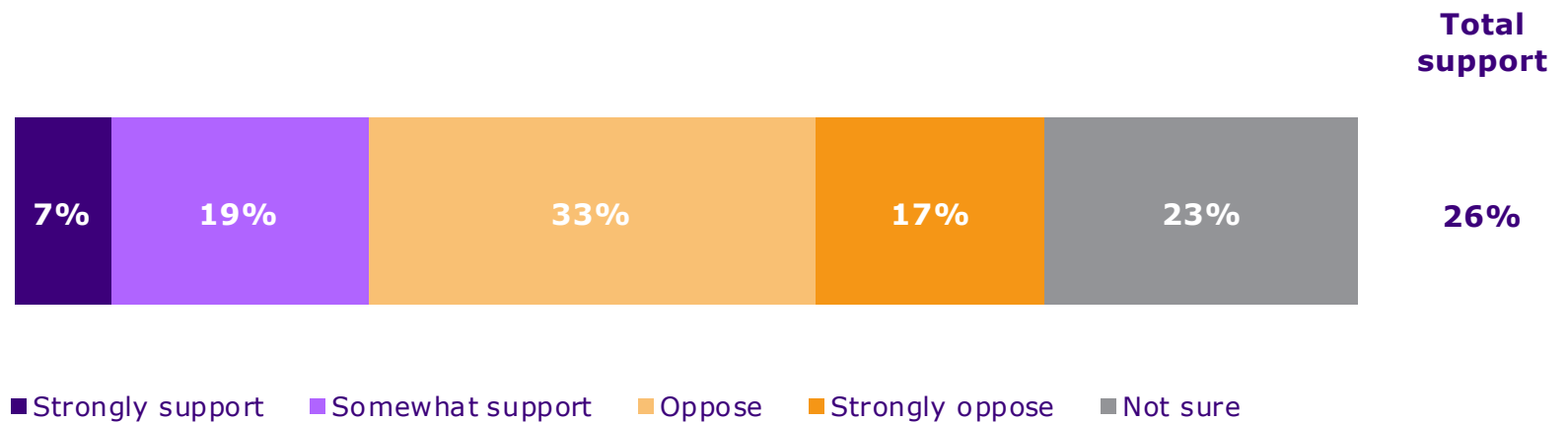
Fewer than four in ten residents are concerned that ridesharing services would make congestion worse.



Q. There is some debate about whether ridesharing increases congestion by increasing the number of cars on the road or reduces congestion by having more people share rides and reduce their reliance on car ownership.

SUPPORT FOR LIMITING RIDESHARING CARS

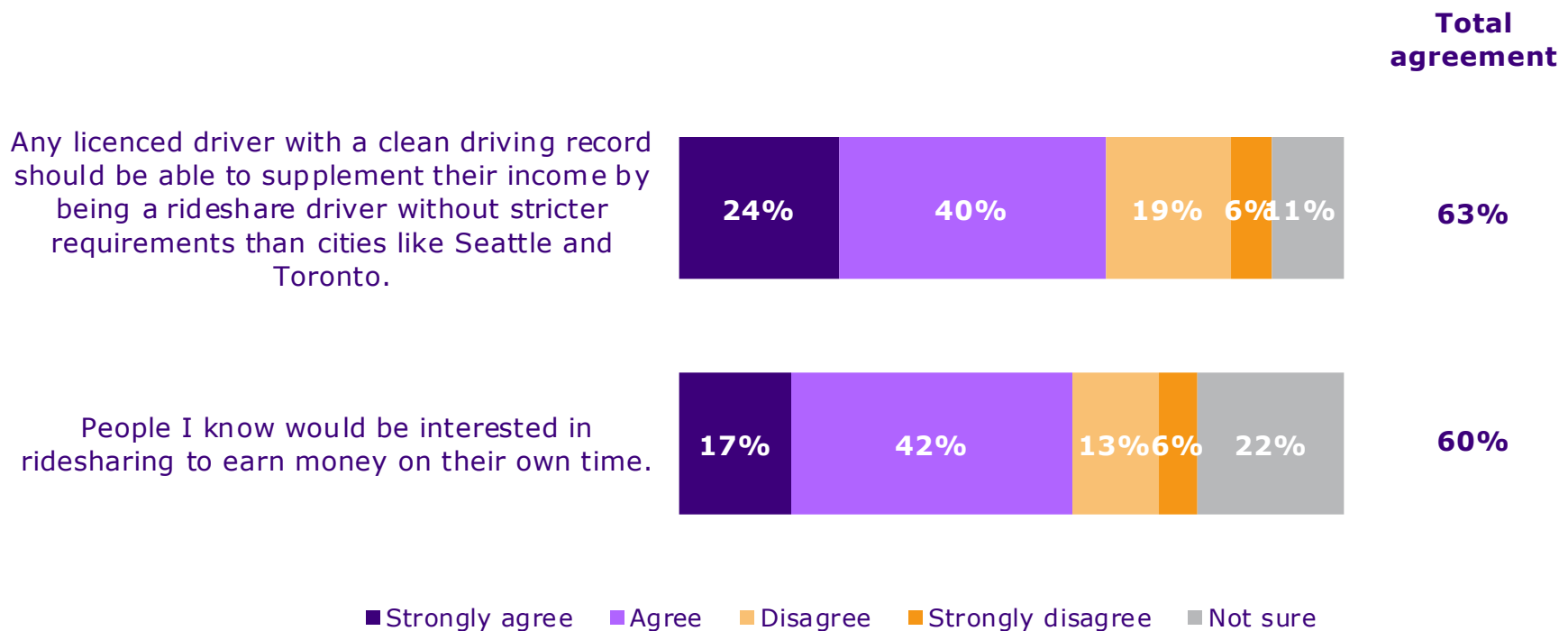
Just one-quarter of Vancouver residents support limiting the number of ridesharing cars allowed on the road.



Q. Some say that limiting the number of ridesharing cars allowed on the road will prevent Lyft and Uber from operating or make them unreliable. Would you support or oppose such a limit?

VIEWS TOWARD DRIVER LICENSING

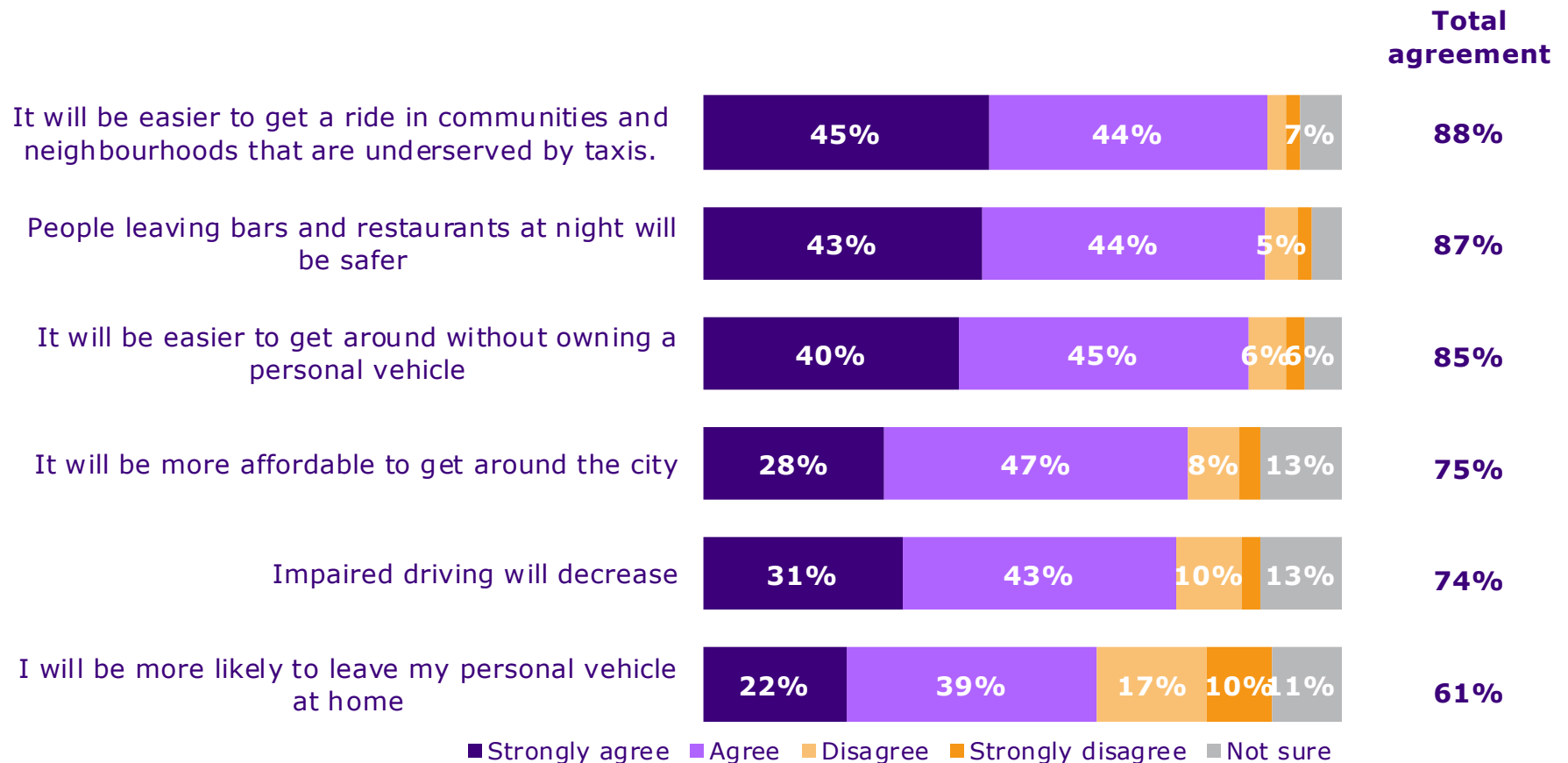
Six in ten Vancouver residents agree any licensed driver with a clean driving record should be able to be a rideshare driver. Most also say they know people who would be interested in driving for ridesharing services.



Q. Do you agree or disagree with the following statements?

PERCEIVED EFFECTS OF RIDESHARING

Almost all say that ridesharing services will have the effect of making it easier to get a ride, making it safer to leave bars and restaurants late at night, and that it will be easier to get around without owning a vehicle.



Q. Please indicate if you agree or disagree with each of the following statements. If ridesharing services come to BC...



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