

Survey Results:

3,075 “Transportation Network Company Eligible” Consumers in the U.S. (in markets where TNCs operate)

January 2016

- Sample Size: n=3,075 Adults 18+; 1.8% margin of error
- Eligibility: -- Use a taxicab, Uber or Lyft in last year
(Yes to all) -- Own a smartphone
-- Possess a credit card
- Interview Method: Online
- Interview Dates: January 11-17, 2016
- Prepared for: Taxicab, Limousine & Paratransit Association

SAMPLE DEMOGRAPHICS – This U.S. sample is young (42% under age 40) and highly educated (77% college grads), exactly the market TNCs target.

■ Gender: 47% Male
53% Female

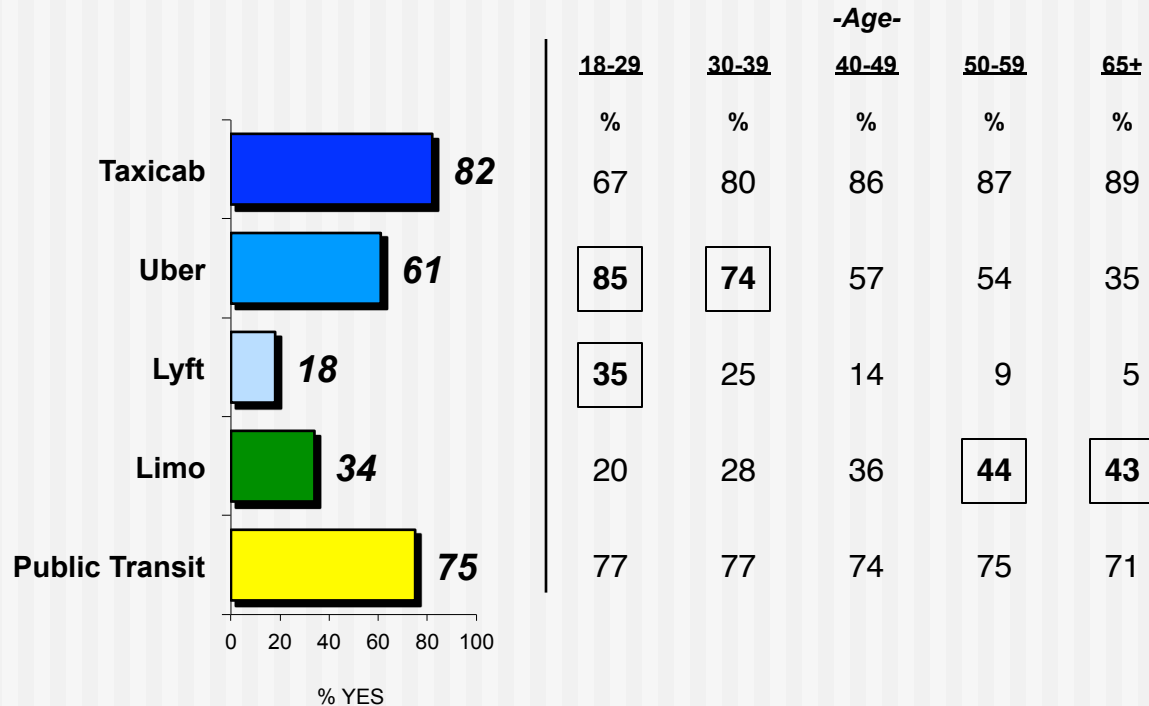
■ Age: 18% 18-29
24% 30-39
17% 40-49
17% 50-59
24% 65+

■ Education: 0% No HS graduate
5% HS graduate
18% Some college
77% College graduate

■ Own Vehicle: 94% Yes
6% No

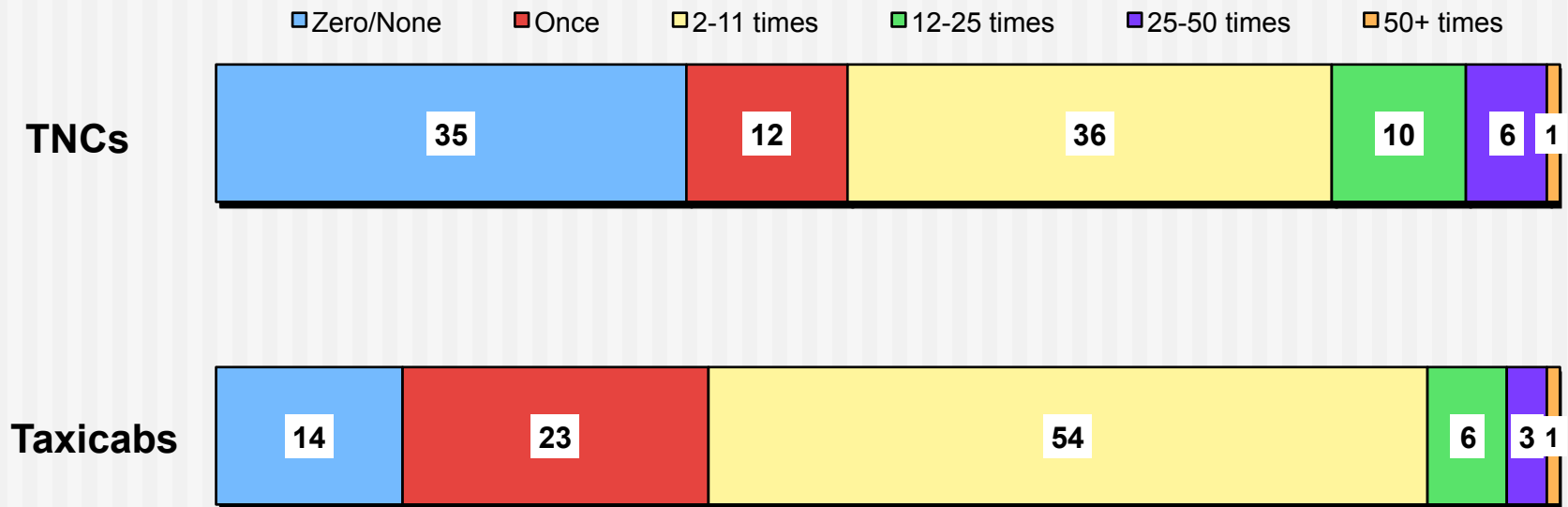
Use of Transportation Services: By Age -- While use of taxicabs is consistently in the high 80% among consumers aged 40+, among those in their 20s, more (85%) have used Uber in the last year than rode in a taxicab (67%). Lyft usage drops sharply with age peaking for those in their 20s (35%), then 25% for those in their 30s into single digits 50+. Limousine users are 10 points over average with these same 50+ consumers while public transit use is consistently in the 70% for all age groups.

In the last year or so, have you ever used the following ride services:



Frequency of Using TNCs and Taxicabs over Past Year -- While more of these “TNC eligible” consumers have used a taxicab than a TNC over the past year, TNC customers tend to be higher frequency users. Just over half (54%) used taxicabs more than once but less than 12 times (once monthly average). About one third (36%) used TNCs at the same modest frequency. However, seventeen percent (17%) took a TNC ride at least once per month over the last year (7% twice monthly or more) while 10% took a taxicab ride at least once per month.

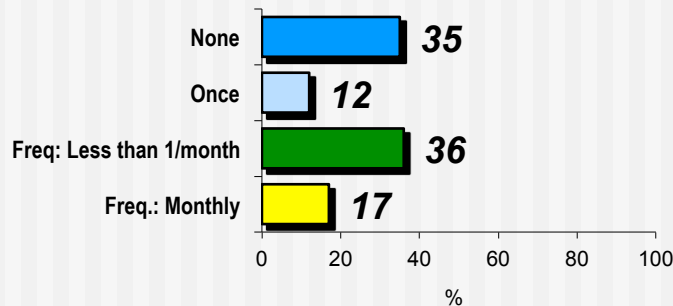
Ride services like Uber and Lyft that use smartphone apps to connect drivers of their own vehicles with passengers are being called “Transportation Network Companies” or TNCs. In the last year, about how many times have you taken a ride using one of these “TNC”/taxicab services?



Frequency of Using TNCs and Taxicabs: By Age -- About one third of consumers in their 20s (34%) are monthly-plus users of TNCs compared to just 13% for taxicabs. In fact, across all age categories, modest taxicab usage of once per year or less than once per month average stays close to the total sample average of 77%.

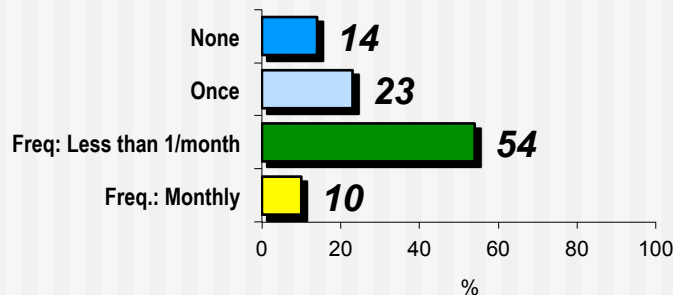
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TNCs



| | -Age- | | | | |
|---|-----------|-----------|-------|-------|-----|
| | 18-29 | 30-39 | 40-49 | 50-59 | 65+ |
| % | % | % | % | % | % |
| | 13 | 22 | 38 | 41 | 61 |
| | 10 | 11 | 10 | 14 | 13 |
| | 43 | 42 | 37 | 36 | 23 |
| | 34 | 24 | 15 | 10 | 3 |

Taxicabs

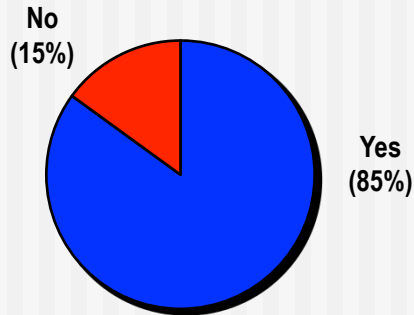


| | 18-29 | 30-39 | 40-49 | 50-59 | 65+ |
|---|-------|-------|-------|-------|-----|
| % | % | % | % | % | % |
| | 22 | 15 | 12 | 9 | 10 |
| | 23 | 20 | 22 | 23 | 25 |
| | 43 | 54 | 56 | 58 | 60 |
| | 13 | 12 | 11 | 9 | 6 |

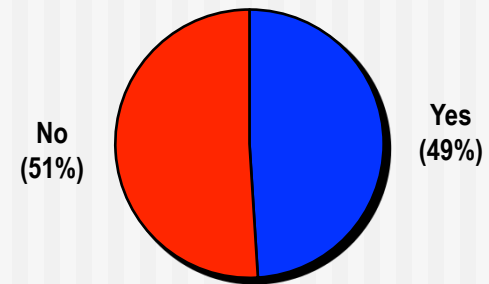
Impact of TNC Use on Other Transportation Options – Use of Uber and Lyft has significant impact since 85% say this has resulted in using taxicabs less, 49% using public transit less, and 60% using limousine service less.

Since you started using the TNCs - that is, Uber or Lyft -- indicate if each of the following are true:

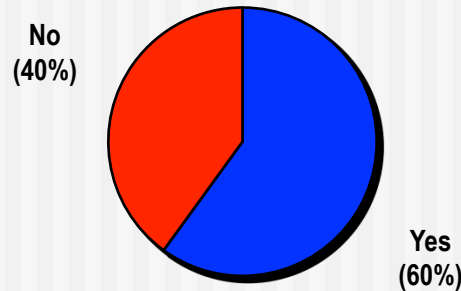
Use Taxicabs Less



Use Public Transit (bus/rail) Less

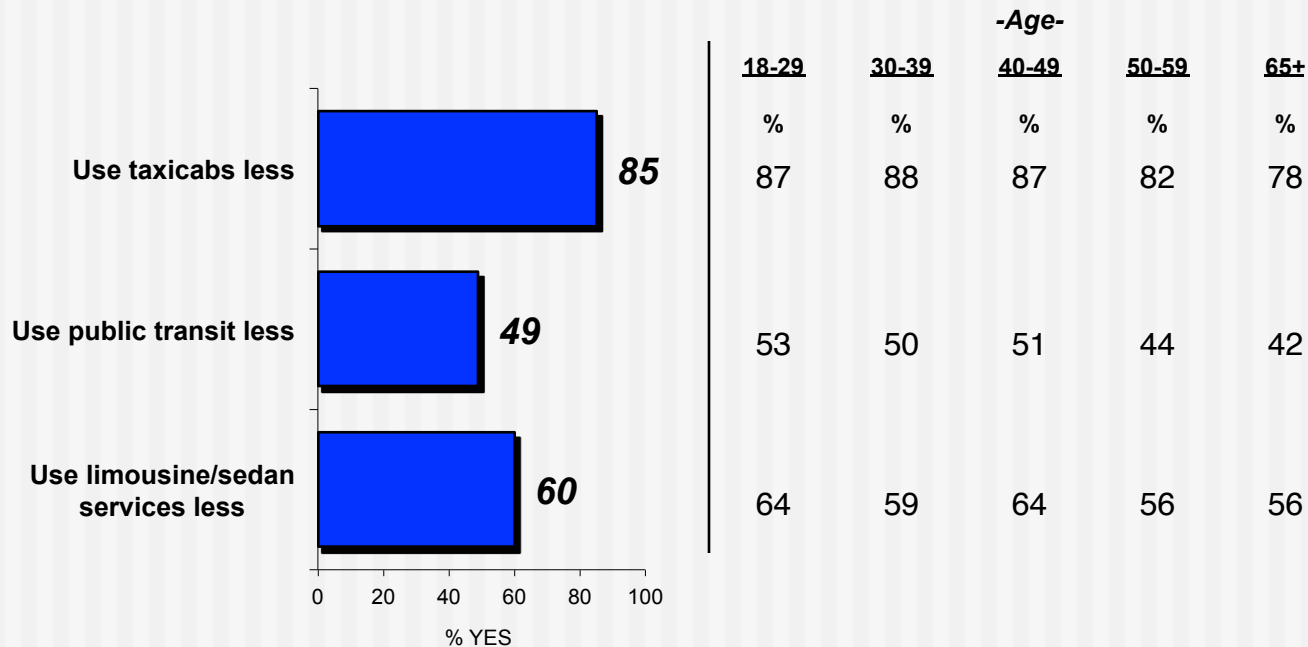


Use Limousine/Sedan Services Less



Impact of TNC Use on Other Transportation Options: By Age – Reduced taxicab use is in the upper 80% for those under the age of 50 but is still 78% for those 65+. Similar patterns in reduced usage also apply to public transit and limousine service confirming that TNCs are cutting most significantly into market share among millennials.

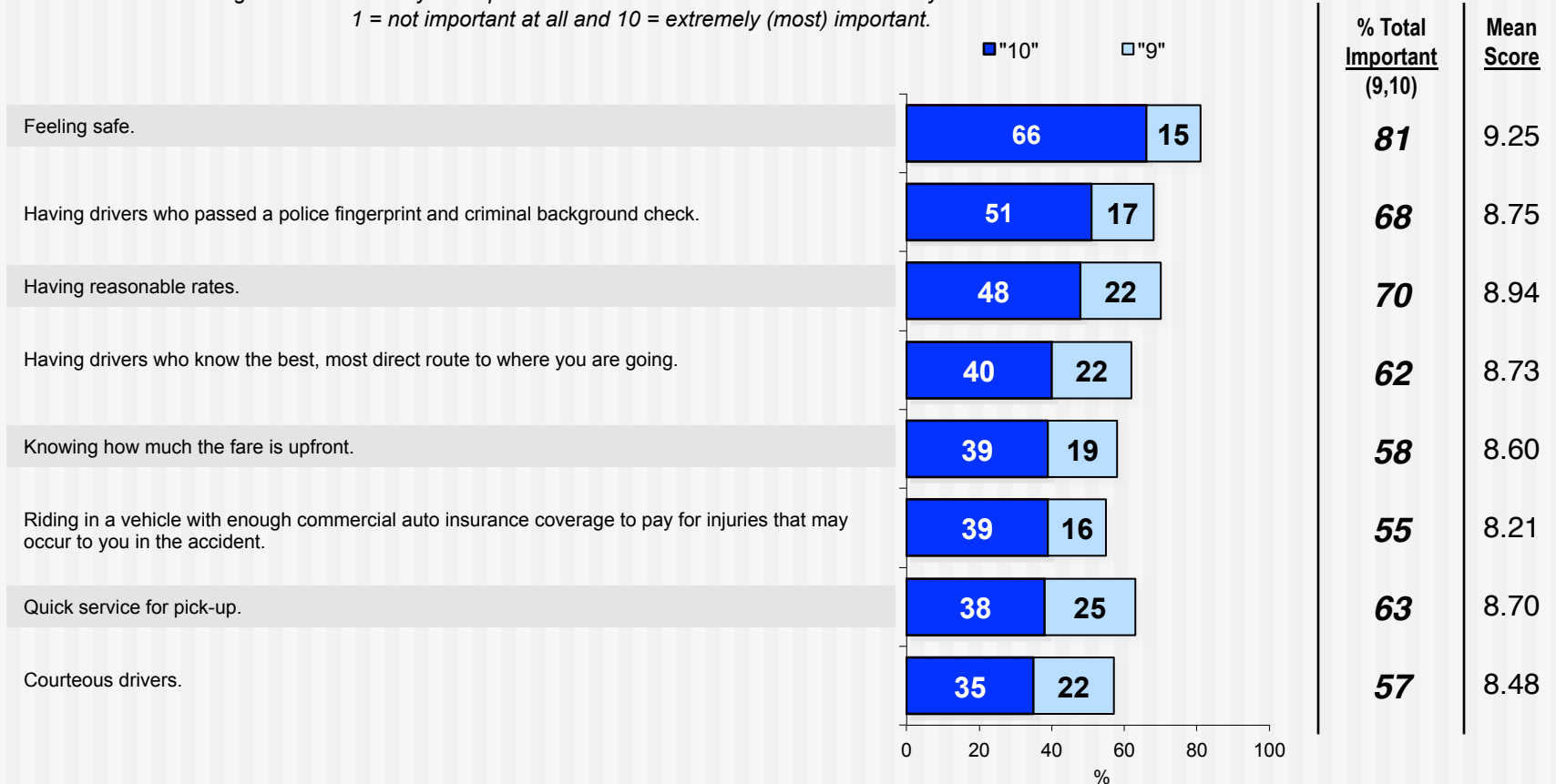
Since you started using the TNCs - that is, Uber or Lyft -- indicate if each of the following are true:



Rank of Most Important Factors in Customer Satisfaction for Ride-for-Hire Services

– “Safety” is the single most important factor in the ride-for-hire customer experience with two-thirds (66%) rating it a “10” on a ten-point scale. In second place, about half rate “10” for “drivers passing police fingerprint and criminal background checks” and “reasonable rates.” After this, third tier factors (around 40% rating “10”) are driver navigation, upfront fares, insurance coverage and quick pick-up.

Next, regardless of whether you purchase a ride from a TNC -- such as Uber or Lyft -- or a traditional taxicab -- rate how important each of the following 16 factors are to your experience and satisfaction as a customer of any of these ride-for-hire services.
1 = not important at all and 10 = extremely (most) important.

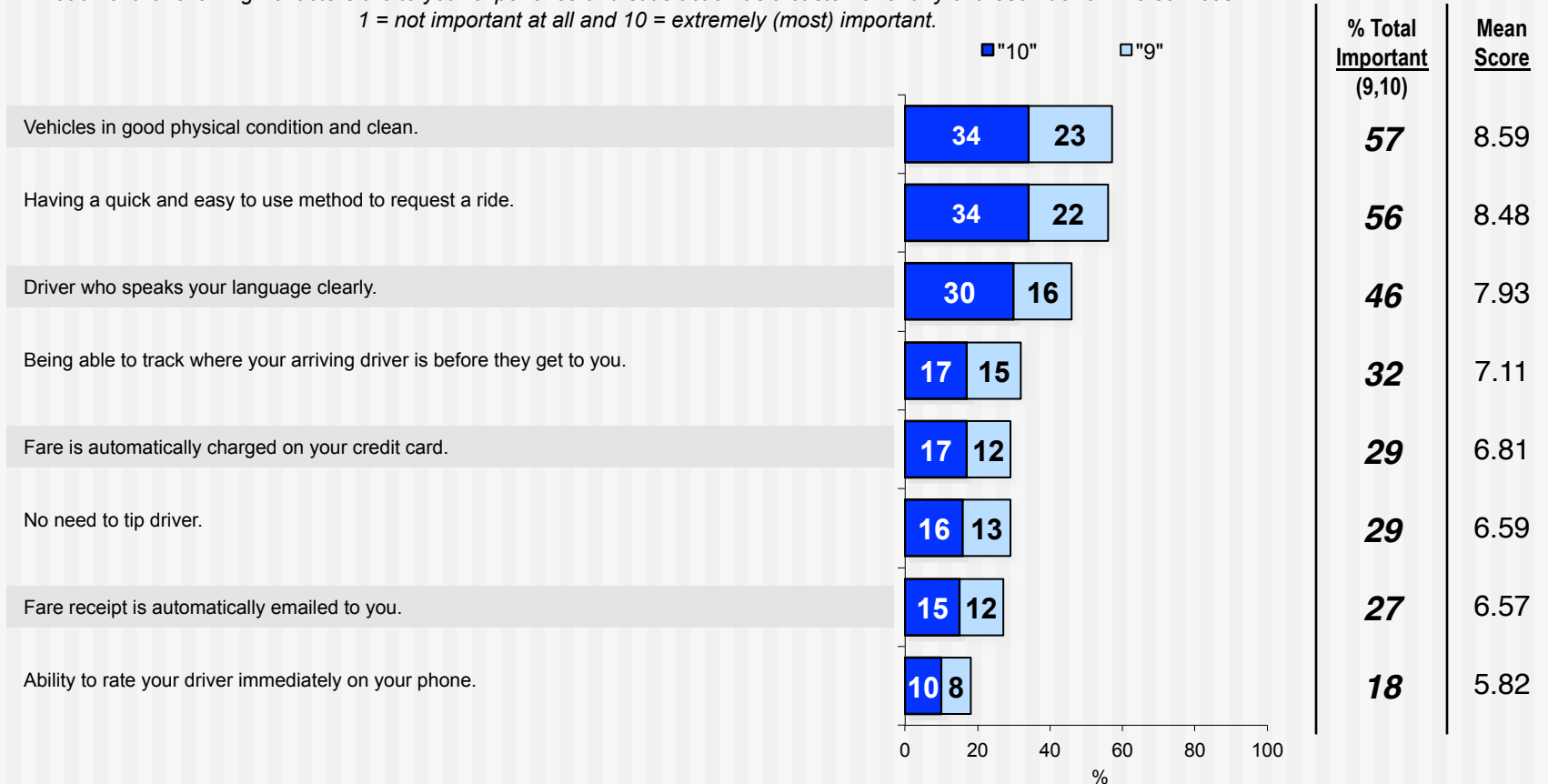


Continued

Rank of Most Important Factors in Customer Satisfaction for Ride-for-Hire Services

(continued) – Factors that less than 50% consider important (rate as “9” or “10”) are driver language, tracking arriving vehicle, automatic charge, no tip, email receipt and ability to rate driver. Still of fairly strong importance (over 50% with high mean scores) are: easy method to request ride and physical condition of the vehicle.

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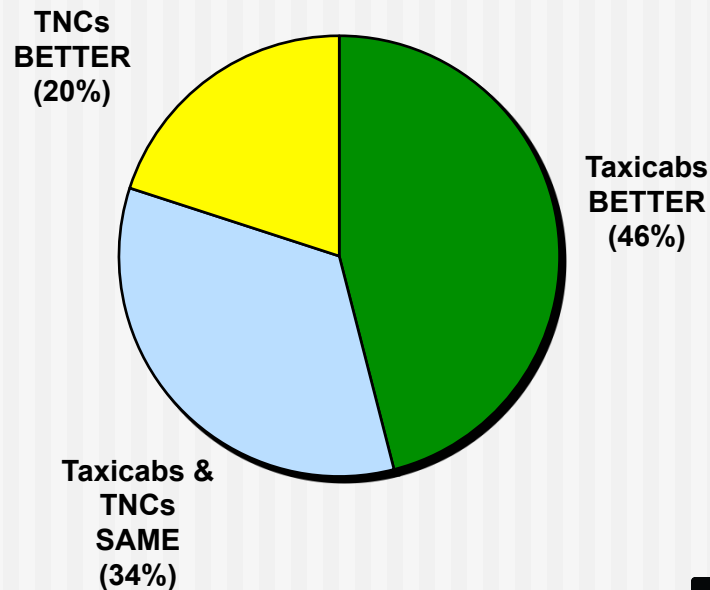


Taxicab Regulation – Overall Value -- Once consumers learn details of taxicab regulations, more consumers come to believe that taxicab regulations are BETTER than TNCs (46%) than seen as either the same (34%) or that TNCs are better (20%).

Taxicab companies are regulated by their local governments. To be licensed to serve the public, they must meet these five criteria:

- Maintain commercial insurance to protect injured passengers from paying for medical bills;
 - Regularly inspect and maintain vehicles;
- Make drivers pass police fingerprint and criminal background checks;
 - Have drivers pass a safety training certification; and
 - Charge the same regulated rate for fares at all times.

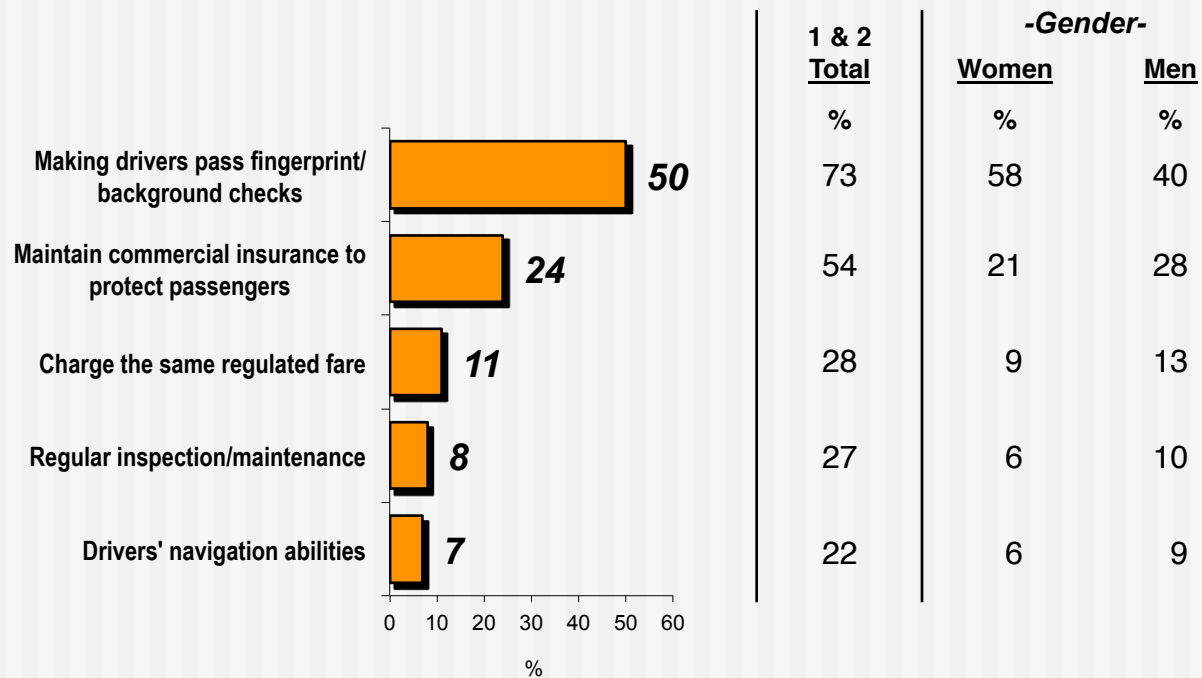
In your mind and experience, does this regulation of taxicabs mean...?



Regulation Factor Making Taxicabs Better than TNCs -- The top regulatory factor giving taxicabs an advantage is “fingerprint / background checks”; 50% pick this as the most important from the list of five regulations. This safety-related factor is even more important to women (58%) than men (40%). This fits with “safety/background checks” scoring as the top factor driving customer satisfaction with ride-for-hire services. Second on the list of appealing regulations is commercial insurance.

Why choose taxicabs over Uber/Lyft? What is more important?

[Asked of 46% Saying Taxicab Regulations “Better”]



Preferred Policy – Regulate TNCs vs. Deregulate Taxicabs -- If faced with choices to “make ride-for-hire services equal” the majority prefer regulating TNCs (58%) over deregulating taxicabs (18%). This demonstrates the importance of educating the public on the specific regulations – notably driver safety background checks and passenger safety commercial insurance.

In order to make “ride-for-hire” services equal, which would be better, deregulating taxicabs or regulating Uber and Lyft like a taxicab?

