Summary Overview of the Taxicab Industry in Winnipeg

Taxicab Board
Manitoba Indigenous and Municipal Relations
Purpose of This Document

The Government of Manitoba, Taxicab Board seeks to maintain a healthy, sustainable taxicab industry in the City of Winnipeg that provides quality, affordable services and meets the needs of consumers. MNP LLP has been hired to conduct a comprehensive review of the taxicab industry and to provide the Taxicab Board with recommendations to ensure a financially viable, safe and modern industry while meeting acceptable service levels.

Key to this review is meaningful consultation with key stakeholders of this industry, as well as the general public who use these services. This summary document is intended to provide all stakeholders with information about the taxicab industry in general and specifically in Winnipeg, to inform the consultation process.
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1.0 INTRODUCTION

The taxi and limousine service industry in Canada is significant. In 2015, it represented revenue of $2.7 billion and is comprised of over 18,725 businesses paying wages of $1.2 billion. Sufficient, affordable and varied methods of transportation are critical to vibrant, thriving cities. Taxi and limousine services are a key component of the transportation framework.

This industry is complex due to a variety of operating structures and regulatory regimes. Its growth and profitability are affected by consumer spending, corporate profit, inbound international travel, the world price of crude oil and new vehicle sales. New technologies and programs as well as the increasing awareness of our impact on the environment are also having a profound effect on the taxicab industry.

In Manitoba, the Taxicab Board (TCB) licenses and regulates all taxicabs operating in the city of Winnipeg. Its mandate is to ensure all people within Winnipeg have access to quality, safe and efficient taxicab service.

1.1 The Taxi Industry in Winnipeg at a Glance

The taxicab industry in Winnipeg is comprised of taxicab and limousine owners and drivers as well as specialized companies that provide transportation to people requiring mobility assistance and people with disabilities. There are distinct classes of taxicab business licences required for each vehicle operating as a taxi. Dispatch companies are not directly regulated and do not hold taxicab business licences.

There are two major ‘cab companies’ in Winnipeg (the dispatch companies). Duffy’s and Unicity are affiliated with 99 per cent of the standard taxis, 89 per cent of seasonal taxis and 16 per cent of the accessible taxis in the city. These companies are cooperatives of taxicab owners, and provide branding and dispatch services to taxicab owners on a 24/7 basis for an administration fee.

Eleven companies operate 49 accessible taxis, which provide service to passengers with or without wheelchairs. Another twelve operate 80 Handicab vans, which service people with disabilities and their escorts exclusively, have ramps or lifts, and offer additional door to door assistance to the passenger. Two limousine companies are affiliated with approximately half of the 104 limousines and specialty vehicles, with the balance divided among 21 other companies. There are five different licence types within the limousine category.

The number of standard taxicab business licences has not changed significantly since 1947, and has remained constant at 410 since 2008. The number of licences for other classes of taxicab including accessible taxis, handicab vans and limousines has increased by a total of 119 from 2008 to 2015.
Taxi users access the service by contacting a dispatch service, the cab or limousine service directly, via a taxi stand, or by hailing the cab on the street. The general means of contact for a dispatched taxi or limousine is by telephone. Duffy’s and Unicity provide access by telephone, on-line bookings and mobile Apps.

There are designated taxi stands at Richardson International Airport, many of the major hotels and hospitals, and in eleven designated curbside locations downtown. The City of Winnipeg recently authorized a pilot project to enable use of loading zones in the downtown and Exchange District as taxi stands. Figure 1 below depicts the categories of vehicles for hire in Winnipeg.

Figure 1 Vehicles for Hire in Winnipeg

<table>
<thead>
<tr>
<th><strong>Taxicab to Population Ratio (2015)</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Taxis &amp; Accessible taxis</td>
<td>1:1,565</td>
</tr>
<tr>
<td>(not including seasonal)</td>
<td></td>
</tr>
<tr>
<td>Standard Taxis</td>
<td>1:1,752</td>
</tr>
<tr>
<td>Accessible Taxis</td>
<td>1:14,659</td>
</tr>
<tr>
<td>Handicab vans</td>
<td>1:8,978</td>
</tr>
</tbody>
</table>

Source: Taxicab Board, January 12, 2016

2.0 THE TAXICAB INDUSTRY REGULATORY FRAMEWORK AND INDUSTRY PARTICIPANTS

Almost all North American jurisdictions regulate the taxi industry to some degree. Regulation primarily falls under local government jurisdiction. The taxi industry in Manitoba is regulated by a variety of legislated acts including: The Taxicab Act; The Taxicab Regulation; Taxicab Fees Regulation; Taxicab Board Rules of Procedure Regulation; The Manitoba Public Insurance Corporation Act; The Highway Traffic Act; The Drivers and Vehicles Act; and The Accessibility for Manitobans Act. Common regulatory characteristics in most jurisdictions include entry and exit control, fare setting and geographic jurisdictions/restrictions. In Manitoba, the industry is comprised of several participants.

The Taxicab Board (TCB) is an independent quasi-judicial administrative tribunal established under authority of The Manitoba Taxicab Act to license and regulate all taxicabs, wheelchair vans and limousines operating in the city of Winnipeg. The Motor Transport Board regulates taxis operating inter-municipally (outside of Winnipeg). A Manitoba municipality may also have by-laws regulating taxi within their respective jurisdictions.

The mandate of the Taxicab Board is to ensure citizens in Winnipeg receive quality taxicab service that meets the public need at a reasonable cost through the administration of a system of economic
regulation, and enforcement of regulations or policies that are in the best interest of public, passenger and driver safety.

The Taxicab Board Office (TCBO) performs the activities as outlined on the right and provides administrative support to the Taxicab Board. The Secretary to the Board, responsible for maintaining board records and activity on the TCB’s behalf, is a combined position with the director of the Taxicab Board Office. The TCB’s inspectors and customer service representatives conduct the activities as outlined to the right.

**Driver Training**

The TCB contracts with an external service provider to provide mandatory initial training for new taxicab drivers and remedial training as required for existing licensed taxi drivers. The training provider develops the curriculum and materials for TCB approval.

**Licensing**

A **taxicab business licence** (TBL) may only be held by the owner of the taxicab. The large majority of taxicab owners contract with one of the two main companies for dispatch and marketing purposes. Taxicab owners may employ one or more drivers to maintain 24-7 operations of the taxicab, and are responsible for ensuring any drivers they employ hold a taxicab driver’s licence and a driver’s licence. A taxicab owner can be an individual, a corporation, or a taxicab driver. The fee for initial and annual renewal of a taxicab business licence is $200 for a standard taxi or limousine, and $100 for an accessible or Handicab van.

Taxicab **drivers** perform the actual service of transporting passengers, and must hold a taxicab driver’s licence. Drivers must also hold a professional driver’s licence (Class 4 or better) issued by Manitoba Public Insurance (MPI). Drivers must undergo background checks, complete training, and pass an exam before being eligible for a taxi driver’s licence. The fee for initial and annual renewal of a taxicab driver’s licence is $30.

**Dispatch Services**

A **dispatch service** carries out the business of dispatching taxicabs in response to requests for taxicab services. There are two dispatch service companies in Winnipeg that are cooperatives of taxicab owners, Duffy’s Taxi and Unicity Taxi. These companies are affiliated with 99 per cent of standard taxicabs, with fleets of 216 and 286 standard and seasonal taxis respectively. The dispatch company does not directly own any taxicabs or hold any licences. There are a number of independent owner operators and small companies that both own and dispatch their own fleet, and may provide a dispatch service for others.
The large majority of these are accessible taxis. Beyond Duffy’s and Unicity, nine companies are affiliated with accessible taxi fleets ranging from 1-10 vehicles. In addition to the companies that offer accessible taxis, there are 13 companies that offer services to people while being transported in their wheelchairs. While The Taxicab Act and regulations do not specifically regulate dispatch services, taxicab business licence holders (owners) may only operate or be affiliated with a dispatch service that conforms to a number of requirements. These include accommodating requests for service in order of request to any person that requests service, carrying on business 24 hours a day, responding promptly to requests for service and complaints, compliance with the Human Rights Code, and dispatching only to valid licence holders.

3.0 THE LICENSING STRUCTURE

The Taxicab Board is responsible to determine the number of licences to be issued, the types of licences and their respective terms and conditions, as well as the licence application criteria and fees. There are two major licensing requirements in the taxicab industry in Winnipeg:

- taxicab business licence
- taxicab driver’s licence

A taxicab business licence (TBL) is a licence, approved and issued by the Taxicab Board that allows the owner to carry on the business of keeping a taxicab for hire. The TBLs are renewed on an annual basis by March 1 of each year. Taxicab business licences are not transferable or convertible to a different class of licence without the consent of the TCB.

The TBL owner is required to carry on the taxicab business, however the regulation permits the option to grant Power of Attorney to another individual or enter into a management agreement for a maximum of 30 days in the event of temporary absence or illness. The TCB can extend this timeframe. Any licence holder must not contravene any municipal, provincial or federal legislation.

Each taxicab driver must hold a valid taxicab driver’s licence. This is issued by the TCB and is renewable on the same day as the person’s Manitoba driver’s licence under The Drivers and Vehicles Act. In addition to a valid Class 4 or higher Manitoba driver’s licence the individual must:

- pass an English Language Assessment (written to benchmark 5)
- successfully complete the Taxicab Driver Training program
- submit a recent criminal record check including a vulnerable sector search (every 4 years) and a child abuse registry check (every 2 years)
- identify any medical conditions that would affect their ability to perform the driver requirements under The Taxicab Act and regulations
- undertake training, unless they have maintained their taxicab driver’s licence in the past three years

If an individual’s Manitoba driver’s licence is suspended, they must surrender their taxicab driver’s licence to the TCB.
Types of Taxicabs

As of January 2016, a total of 750 vehicles were licensed. Each licence is categorized as either a taxicab (standard/accessible), Handicab van, limousine or bus with subcategories based on the type of vehicle. The table below depicts the breakdown by category.

Table 1: Active Taxicab Business Licences by Category, Winnipeg 2016

<table>
<thead>
<tr>
<th>Category</th>
<th>Type of Vehicle</th>
<th>Percentage</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Taxicabs</strong></td>
<td>Standard Taxis (ST)</td>
<td>54.67%</td>
<td>410</td>
</tr>
<tr>
<td></td>
<td>Seasonal Taxis (SE)</td>
<td>14.27%</td>
<td>107</td>
</tr>
<tr>
<td></td>
<td>Handi-Cab Vans (HV)</td>
<td>10.67%</td>
<td>80</td>
</tr>
<tr>
<td></td>
<td>Accessible Taxis (AT)</td>
<td>6.53%</td>
<td>49</td>
</tr>
<tr>
<td><strong>Limousines</strong></td>
<td>Executive Cars (EC)</td>
<td>5.47%</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td>Standard Limo (SL)</td>
<td>4.40%</td>
<td>33</td>
</tr>
<tr>
<td></td>
<td>Specialty Vehicle Limo (SV)</td>
<td>3.07%</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Classic Limo (CL)</td>
<td>0.27%</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Premium Limo (PL)</td>
<td>0.13%</td>
<td>1</td>
</tr>
<tr>
<td><strong>Bus</strong></td>
<td>Specialty Vehicle Bus (SV)</td>
<td>0.53%</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Assisted Transportation (AS)</td>
<td>0.00%</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total Licensed Vehicles</strong></td>
<td></td>
<td></td>
<td>750</td>
</tr>
</tbody>
</table>

4.0 THE TAXICAB MARKET

4.1 Canadian Overview

The taxi and limousine service industry in Canada in 2015 achieved revenue of $2.7 billion. There are over 18,725 businesses with no major players. The largest segment in the industry is taxi services, at almost two thirds of total revenue. Luxury and corporate sedan travel is the industry’s second-largest earning product at 17 per cent of industry revenue. Domestic private consumers contribute more than half of the industry’s annual revenue in Canada. Private consumers use taxicabs for a range of reasons, but tend to use these services evenings and weekends when they are going to dinner, a movie or social events. As such, demand from private consumers is closely linked to disposable income. Individuals use limousines and luxury vehicles for special nights such as weddings, anniversaries, birthdays, graduations and holiday sightseeing. Private consumers may also be business travelers who use these services when traveling to other cities for work.

Corporations are the industry’s second largest market segment in Canada, accounting for about one-third of total industry revenues. Corporations use limousine and luxury sedan services to provide...
executives and other employees with comfortable and reliable transport between home and work. In some cases, corporations have preferred supplier relationships with limousine companies, reducing customer waiting time and allowing for cashless transactions and easy payment of expenses. Corporations also use limousine services to transport company clients to offices or to and from airports.

Foreign and domestic tourists are another major consumer of taxi services. They are primarily transported to and from airports. Many visitors have limited knowledge of locations, destinations and how to travel around various cities. As such, tourists rely on the knowledge of taxi drivers. Cities and associated tourism associations view the taxi industry as important ambassadors for the city and/or province.

As a service-based industry, the taxi and limousine services industry business distribution closely mirrors Canada’s population distribution. Larger cities, where population densities are high and disposable incomes are higher than average, support more efficient use of taxis and limousines and a thriving industry.

4.2 The Winnipeg Market

Sufficient financial information is unavailable to accurately segment the services in Winnipeg by revenue. In an effort to quantify supply in Winnipeg, the following graphics depict the change in number of taxis by category over time.

*Figure 2: Taxicab Licences by Category - 2008 to 2015*
Demand for Taxicab Service

A range of factors determine demand for taxicab and limousine service. These include population and population growth, disposable income, tourist and business visitor volume, the elderly/aging and population with disabilities as well as availability of other forms of transportation, to name a few.

Developing a profile of taxicab users in Winnipeg is important to identify the need and demand for these services. This consultation process will help to develop an understanding of taxicab services and user demands in Winnipeg.

Winnipeg’s Population

As of July 2015, the city of Winnipeg had an estimated population of 718,300. Its surrounding census metropolitan area (CMA) was projected to have a population of 74,800 for a total Winnipeg CMA of approximately 793,000. It is expected that Winnipeg’s population will grow to 756,200 and the total Winnipeg CMA will grow to 835,000 by 2019. The Winnipeg CMA is estimated to rise above 1.0 million by 2035. (Conference Board of Canada, 2015)

Winnipeg’s Indigenous population represents 10 per cent of the overall population. This is the highest percentage of all Canadian urban centres. Winnipeg’s Indigenous population has grown by almost 9,000 people since the mid-nineties and is expected to be more than 100,000 people by the year 2020.

The Government of Manitoba’s Accessibility Standard for Customer Service reports that approximately 200,000 Manitobans deal with barriers to accessibility. The total income of people living with disabilities in Manitoba is more than $4 billion annually and the number of people who require accessible services is expected to grow along with the aging population.
Income

Economic Development Winnipeg reports that Winnipeg’s unemployment rate was 6 per cent compared to 6.9 per cent nationally in 2015. The number of people employed in the city grew by seven per cent or 29,538 positions between 2010 and 2015. (Suzuki, 2016)

The median family income for Winnipeg in 2013 was $77,770 and represents a 5 per cent increase from 2011 to 2013. The median family income for Canada was $76,550. (Statistics Canada, 2015) Wages in the province of Manitoba increased by 2.6 per cent per year on average from 2011 to 2015 which is slightly above the national average increase of 2.5 per cent. (Suzuki, 2016)

Average household expenditures in Manitoba increased by approximately 2 per cent from 2013 to 2014, and represent approximately 94 per cent of the national average. Expenses allocated to transportation also increased from 2013 to 2014, from 16.02 per cent to 16.27 per cent. Nationally, transportation represents 14.73 per cent of average household expenditures.

Tourism

As of 2012, “Tourism in Manitoba is a $1.52 billion industry, representing 2.8 per cent of the province’s GDP, and some 10.6 million visitors to Manitoba” (Travel Manitoba, 2016). Tourism temporarily spikes the city’s population as well as the number of taxicabs needed at large events and gatherings. The overall increase in tourism related spending indicates a growing need for the taxicab industry to provide services during peak travel seasons. Airport traffic was up over five per cent from 2013 to 2014, and YTD figures for 2015 indicate a further increase of 3.6 per cent.

Taxicab Service Data

As one source of identifying demand, MNP considered historical dispatched taxi trips, completed taxi trips by area and trips by hour of the day. Information was received from the two largest taxi dispatch companies (Unicity and Duffy's) and a few independent operators. Data received from Unicity and Duffy’s includes all of their vehicles and is not broken down into Standard, Accessible and Seasonal categories. In the analysis, therefore, these categories are combined under the joint name of “taxis”. Data was received that represents 90 per cent of the taxis so, for the overall analysis, the numbers were grossed-up by 10 per cent. This assumes that the experience of Unicity and Duffy’s is representative of all taxis in the city, which may over-represent the data.

The dispatch companies record the number of calls that are dispatched and the outcome of each call. A call may be for immediate pick-up or it may be pre-booked for a scheduled pick-up time in the future. Taxis will also pick up customers that hail them down in the street, at designated taxi stands or at various locations where people tend to need a taxi, such as hotels, restaurants, bars, tourist attractions, sporting events or hospitals. We refer to trips from any of these locations as “street hails”. They are recorded separately by the dispatch companies and not included in the numbers for dispatched trips. The airport is also considered a taxi stand where customers acquire a taxi without having to call for it. Trips that originate from the airport are also not included in the number of dispatched calls or street hails.

Most of the time, a dispatched call will result in a completed trip when the taxi picks up the customer and delivers the requested service. A call may also be cancelled after it has been dispatched or the taxi may arrive and find out that the call is gone, which is called a “no show”. Figure 4 illustrates an estimate of the
number of dispatched trips for the city of Winnipeg. A total of 3.13 million dispatched trips were completed.

Figure 4 below depicts the number of dispatched taxi trips. The number of dispatched taxi trips in a month ranges from a low of 270,000 in August to a high of over 360,000 in December. There appears to be higher demand for taxis in the winter months and reduced demand in the summer. The percentage of trips that are cancelled is lower in the summer (averaging 5.6 per cent) versus in the winter (averaging 7 per cent). The percentage of “no shows” is fairly stable at around 7.6 per cent with slight increases in the winter only.

*Figure 4: Dispatched Taxi Trips - 2015*

The number of completed taxi trips is illustrated in Figure 5 which follows. There were a total of 4.48 million completed trips in Winnipeg in 2015 comprising of completed dispatched trips (70 per cent), recorded “street hails” and airport trips. The data on the number of airport trips is provided by the Winnipeg Airport Authority (WAA) which records all of the trips originating from the airport. Unicity is the primary taxicab service provider at the airport which gives Unicity drivers exclusive rights to join the queue picking up fares at the airport. Hollywood Limousine is the executive car/limousine service provider contracted with WAA.

Unicity records show that street hails are approximately 37 per cent of completed trips. Duffy’s records show that street hails are only 12 per cent of completed trips. The percentage of “street hails”, appears highest in October and November. The volume of trips originating from the airport is fairly consistent throughout the year.
Trips by Area of Winnipeg

Unicity and Duffy’s have both divided the city into over 20 different zones to assist them in managing their coverage of the city and in being responsive to demand. They track the number of trips that originate from each zone. Although they are similar, the zones and the boundaries that the two companies have defined are not the same. For the purpose of this review, Unicity’s and Duffy’s zones were roughly combined to show the number of trips originating from general areas of the city. The areas of the city that were defined for this analysis are listed below and appear in Figure 6.

<table>
<thead>
<tr>
<th>Area 1</th>
<th>Northwest (including the airport)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area 2</td>
<td>North</td>
</tr>
<tr>
<td>Area 3</td>
<td>Northeast</td>
</tr>
<tr>
<td>Area 4</td>
<td>Southeast</td>
</tr>
<tr>
<td>Area 5</td>
<td>Southwest</td>
</tr>
<tr>
<td>Area 6</td>
<td>Central (around Downtown)</td>
</tr>
<tr>
<td>Area 7</td>
<td>Downtown</td>
</tr>
</tbody>
</table>

Figure 5: All Completed Taxi Trips

![Completed Taxi Trips - Dispatch, Street Hail and Airport](image)

Completed Taxi Trips - Dispatch, Street Hail and Airport

- Completed Dispatched
- Street Hails
- Airport
In proportion to the size of the area, there is a much higher concentration of taxi trips in the core downtown area of the city and, to a lesser degree but still high, in the central area surrounding downtown to the north, west and south. There is a large number of trips from the airport which causes the totals from the northwest area to be higher than what would be expected. The north area, although smaller than the other areas (except central and downtown) has a higher volume of taxi trips, suggesting a higher use of taxi services by residents in that area.

**Trips by Hour of the Day**

There is a distinct pattern of the number of taxi trips occurring at different times in the day. Figure 8 shows the combined data for Unicity and Duffy’s, grossed-up to represent all companies.

![Figure 7: Taxi Trips Volumes by Area of Winnipeg](image)

![Figure 8: Taxi Trips by Hour of the Day](image)
The number of taxi trips ranges from a low of about 330 trips in the hour from 4–5 a.m. to a high of almost 690 trips in the hour between 2–3 p.m. In general, the volume of taxi trips is highest in the afternoon and evening which is presumably when many customers are using a taxi to get home from work or their other daily activities. Taxi use is high again in the hours just before and after midnight. This is likely due to patrons of restaurants, bars and special events using a taxi service to go home.

4.3 Fare Structure

Historical Fares

The industry has requested adjustments to the fare structure for a variety of reasons in recent years including fluctuating GST and inflation rates; increasing fuel prices, insurance premiums and repair costs; as well as costs associated with the implementation of mandated vehicle safety enhancements. These costs are the responsibility of individual business licence holder(s) in which case an application for a fare/tariff adjustment is often requested to offset the additional expense.

In 2010 the Taxicab Board approved a temporary surcharge of $0.20 to the initial drop rate to offset the cost of additional Board mandated vehicle safety equipment. This increased the initial drop meter rate to $3.50. In 2012 the Taxicab Board approved industry’s request to extend the $0.20 surcharge indefinitely. The TCB’s decision was supported by a reported 3.1 per cent increase in the consumer price index in Manitoba in 2011 and a 9.9 percent an increase in the cost of operating a passenger vehicle. The initial drop meter rate has not changed since 2012.

Figure 9 below reflects historical fare adjustments for standard and accessible metered taxicabs in Winnipeg from 1997 through 2012. The figures represent the fixed initial drop rate; however, do not include the variable rate charged for additional distance travelled and/or the variable wait time charge per second.

*Figure 9: Historical Drop Meter Fare Adjustments in Winnipeg, 1997 – 2012*

*Note: Incremental changes occurred in both July and December of 2004.*
4.4 Measuring Performance

There are no shared, commonly understood customer service standards for the taxicab industry in Winnipeg. In this section, wait times, complaints and compliance to requirements and standards will be explored. Viability of the industry requires that the owners can achieve sufficient profitability and employees are compensated appropriately while balancing the needs of the consumer for an affordable service. The financial performance of the industry in Winnipeg is also detailed in this section.

4.4.1 Wait Times

One of the most significant measures of satisfaction with taxi service is the amount of time that a customer must wait from the time that they request a taxi to the time that it arrives at the requested location. The request is made via:

- phone call
- online through company web-site
- a smart-phone App

Once a request is received the dispatch company will send it to a taxi that is in the area. The taxi may accept the call or reject it if they are unable to take it, in which case the call is sent to other taxis until one of them accepts the call. The time required for a taxi to accept the call is part of the wait time for the customer. Once the call is accepted there is further wait time required for the taxi to arrive at the requested location. Wait time is calculated by combining the time from dispatch call to taxi acceptance plus the time from acceptance to arrival at requested location. Unfortunately there is insufficient data about wait times collected by the industry in Winnipeg.

4.4.2 Complaints

An analysis of complaints filed with the TCB provides important information about customer service but should not be considered comprehensive or the sole measure of customer service. The data analyzed includes complaints made to the TCB only; it does not include complaints filed with dispatch companies or cases where a dissatisfied customer does not submit a complaint.

The TCB is responsible to handle driver conduct or vehicle safety complaints filed by taxi customers and/or the general public. Common service complaints such as wait times are the responsibility of the dispatch companies. Over the period of 2011 to 2015, the number of complaints filed with the TCB has been on a slight downward trend. There was a high of 141 complaints in 2012 and a low of 101 complaints in 2015. With approximately 4.5 million annual taxi trips, the number of complaints is well below one per cent per year. The following figures depict the trends in taxi complaints broken out by issue of concern. As a single complaint submitted to the TCB may contain more than one issue of concern, summing the total in each issue category will result in a higher number than the number of complaints submitted.
Figure 10: Taxi Complaint Trends

The figure below depicts the percentages of types of complaints.

Figure 11: Percentages of Types of Complaint

Distribution of Taxi Complaints by Issue 2011-2015

- Driver Conduct
- Road Safety
- Service Charges
- Poor Service
- Police Referrals
- General/Other
The dominant percentage of complaints were related to driver conduct with an average of 40 per cent of all complaints over the past five years. Driver Conduct complaints can range from something relatively minor to very serious accusations of inappropriate behavior. The second largest category, averaging over 25 per cent, is Road Safety complaints. Most of these complaints involve unsafe/reckless driving. Complaints of the driver talking on a cell phone were included in this category because of the danger resulting from a distracted driver. Cell phone complaints have declined significantly in the past few years largely due to changes in legislation. This is the main factor contributing to the decline of Road Safety complaints in the past few years.

Complaints regarding Poor Service from the taxi driver and demanding inappropriate Service Charges are consistent problems. Service charge complaints have declined in the past few years while Poor Service complaints have risen significantly.

Complaint disposition codes were grouped together in common themes to reduce the number of codes and simplify the analysis and presentation to the reader.

*Table 2: Grouping of Complaint Disposition Codes*

<table>
<thead>
<tr>
<th>Common Theme</th>
<th>Disposition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Could Not Be Pursued</td>
<td>Insufficient Information</td>
</tr>
<tr>
<td></td>
<td>No Written Statement</td>
</tr>
<tr>
<td>Show Cause</td>
<td>Show Cause (Board determines breaches and disciplinary penalties including fines, suspensions or cancellations)</td>
</tr>
<tr>
<td>TCB Action</td>
<td>Letter to driver reminding of regulation requirements</td>
</tr>
<tr>
<td></td>
<td>Letter to Complainant</td>
</tr>
<tr>
<td></td>
<td>No Further Action</td>
</tr>
<tr>
<td></td>
<td>Verbal Warning</td>
</tr>
<tr>
<td>Resolved/Referred to Taxi Co.</td>
<td>Resolved</td>
</tr>
<tr>
<td></td>
<td>Passed to Dispatch Company</td>
</tr>
<tr>
<td>Vehicle Inspection</td>
<td>Inspected - No Deficiencies</td>
</tr>
<tr>
<td></td>
<td>Inspected - Deficiencies</td>
</tr>
<tr>
<td></td>
<td>Corrected</td>
</tr>
<tr>
<td>Other Jurisdiction</td>
<td>Other Jurisdiction</td>
</tr>
</tbody>
</table>
The following graph shows the complaint disposition and percentage of disposition by type.

*Figure 12: Percentage of Types of Dispositions*

Every year about 50-60 per cent of all complaints cannot be pursued. In almost all cases this is because the complainant did not submit a written statement of the complaint. The TCB requires a written statement. In a few cases, there is insufficient information because the complainant does not have the name of the driver or number of the taxi.

The number of times that a complaint is referred to a Show Cause hearing with the Taxicab Board has declined significantly in recent years. In 2013, 17.3 per cent of complaints went to a hearing and 14 per cent in 2012. In 2014, there were only eight Show Cause hearings (3.7 per cent) and in 2015 there was one (0.6%). The percentage of complaints that were resolved amicably or were referred to the taxicab company for internal resolution increased dramatically to 14.4 per cent in 2014 and 20.1 per cent in 2015. Prior to 2014 there were almost no complaints resolved in this manner. In 2015, there was an increase in the number of complaints that were referred to the Winnipeg Police Service or MPI (other jurisdiction).
Common Dispositions for Complaints

Figure 13: Percentages of Dispositions by Complaint Type

- Individuals that file complaints of a serious nature with the TCB are also encouraged to report the incident to the Winnipeg Police Services. These complaints are referred to as Police Referrals and are the most likely complaints to go to a Show Cause hearing (16.7 per cent) and the least likely to be unable to be pursued (29.2 per cent). The percentage of complaints that receive some form of TCB action is fairly consistent across all types of complaints, ranging from 18.8 per cent to 26.6 per cent. Poor Service (15.40 per cent) and General/Other (13.7 per cent) are the most likely to be resolved amicably or referred to the taxi company for follow-up. Police referrals are the most likely to have the disposition “Other Jurisdiction” which typically means that it is either referred to MPI or the TCB defers a decision until a police investigation or legal proceedings are completed.

4.4.3 Financial Performance

The Taxicab Board provided financial data that was collected from Winnipeg taxicab business licence (TBL) holders in order to analyze the current state of financial performance for operators in the industry. This data was collected by the Taxicab Board and is required by the regulations. Data was collected in the fall of 2015 for financial performance in 2014 from 429 of the 656 TBL’s issued. TBL holders could either provide their financial information by completing Part C of the Annual Return of Financial Information and/or by submitting their T2125: Summary of Business, Profession and Commission Income and Expenses from their tax return for the year.

Data for “seasonal” taxicab business licences was evident for only three seasonal taxis, and it was combined with the TBL holders’ “standard” taxicab business licence information submitted. The data
could not be separated. Financial results for the seasonal licences can be assumed to be significantly less than standard licences but with only three out of 373 licences for which financial data was submitted, the impact on the analysis is assumed to be insignificant.

**Revenues**

Revenue is the total of all fares and other income reported in the year. The graph below shows the average revenue reported for each type of taxicab business licence and a combined average of all taxi types.

*Figure 14: Average Revenues for All Types of Taxis*

Average revenue reported for Standard taxis, at $70,080, was the largest among all types of taxis. Accessible taxis averaged only $46,628 in revenue. The fare rate structure for Accessible taxis is the same as for Standard taxis which indicates that the volume of trips for Accessible taxis is significantly less than for Standard taxis. In other words, the utilization of a Standard taxi is much higher than an Accessible taxi. Only a small number of Accessible taxis are affiliated with the two major dispatch companies.

The average annual revenue for Handicab vans was $62,828, which is significantly better than for Accessible taxis. Average revenue reported for Limousines was only $21,813. Limousine fares are fixed amounts that typically exceed the cost of a taxi for the same trip. This indicates that the utilization of limousines is fairly low, which is consistent with many limousines being used sparingly for special occasions. Limousines, are however, used regularly at the airport for riders that prefer a bigger vehicle or upgraded transportation. It is possible that the data on the Limousines could be skewed by the low response rate in this category.

**Expenses**

The categories of expenses defined on Part C of the Taxicab Board Annual Return are very similar to the expense categories on the CRA Form T2125. There was, however, inconsistency between how the
information was reported on the two forms. There was also inconsistency in how the information was reported on the same form by different taxicab business licence holders. In order to provide summary observations and comparative analysis, the reported expenses were grouped into major expense categories.

*Figure 15: Average Summary Expenses and Net Income for Each Taxi Type*

Expenses are illustrated as a percentage of the revenues in the figure on the next page.

*Figure 16: Average Summary Expenses and Net Income as a Percentage of Revenue for Each Taxi Type*
TBL holders reported the costs of operating the vehicle to be a large component of costs for a taxi operator. Costs including fuel, repairs and maintenance, insurance, etc. are between 32 per cent and 46 per cent of the revenue collected by the taxi. TBL holders reported the large cost items are salaries, wages and benefits (wages) which relate to the taxicab business licence holder compensating themselves or another contract driver to drive the taxi. Examination of each type of taxi reveals that while wages as a percentage of revenue are quite low for accessible taxis, net income is higher. This may in part reflect how owners are paying themselves.

Management and administration includes, among other things, fees paid for affiliation with a taxi dispatch company and fees for clerical, book-keeping and professional services. These costs are reduced or non-existent for more independent taxicab business licence holders who handle their own needs for dispatch and administrative support.

**Net Income and Total Compensation**

**Compensation for Hired Taxi Drivers**

Many taxi drivers do not own the taxi that they drive or the taxicab business licence. They may be hired by the taxi business and paid for driving the taxi. Depending on the amount they work and the compensation rates agreed upon with the taxicab business licence owner, hired drivers will be paid some portion of the “salaries, wages and benefits” depicted in previous graphs.

**Compensation for Taxi Business Licence Owners**

Almost all TBL holders are single-licence owner-operators. The majority of the standard taxis are affiliated with one of the large dispatch companies, but they are basically independent small businesses. The owners may also be drivers and pay themselves a wage for driving the taxi. However, the owner cannot drive 24 hours per day but needs to keep the taxi on the road to maximize revenue and profit. Most owners will hire one or more drivers and take shifts operating the taxi. Therefore, the “salaries, wages and benefits” may be paid to two or more drivers.

For these companies, the amount that they record as “Net income” is another form of compensation for the owner. It is important to understand that not all of the total compensation is available to the owner. The owner must pay taxes on the Net income and must also repay any debt incurred by the company, typically for capital investment in the taxi and taxicab business licence. The average total compensation per taxicab business licence is presented in Figure 17 on the next page.

Figure 39 below shows the average of the combination of “Salaries, wages and benefits” and “Net income” for the various types of taxis. The financial information collected did not indicate how many drivers were sharing the “salaries, wages and benefits” and did not indicate how much of the “Net income” is used to pay off debt and taxes. Taking the category of Standard taxis, for example, if we ignore debt and taxes and if we assume that the total of $35,000 is split between just two drivers, they would receive compensation averaging $17,500 each, or less.

*Figure 17: Total Compensation per Taxi Licence*
There are three components of capital investment required to enter the taxicab industry. These are all purchases made privately, and do not involve the Taxicab Board. Estimated costs of these components for a standard taxi are provided in Table 3.

### Table 3: Capital Investment- Standard Taxi

<table>
<thead>
<tr>
<th>Capital Investment (Standard taxi)</th>
<th>Estimated Cost or Range</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle</td>
<td>$6,000 - $35,000</td>
<td>The cost will range depending on the category, make and model of the vehicle and whether it is new or used. The amount shown is for a standard taxi. Handicab vans, limousines or buses would typically be significantly more expensive ($60,000 to $85,000 or greater).</td>
</tr>
<tr>
<td>Required Equipment</td>
<td>$4,000 - $5,000</td>
<td>This would include outfitting the vehicle with all necessary equipment, such as taxi meter, safety shield, security camera, etc. The cost would be significantly more for a Handicab van that requires extra safety equipment and a wheelchair ramp or lift.</td>
</tr>
<tr>
<td>Sub-Total</td>
<td>$10,000-40,000</td>
<td></td>
</tr>
<tr>
<td>Taxicab Business Licence (market price for private transaction)</td>
<td>$400,000</td>
<td>This is an approximate amount based on recent sale transfer values as a private transaction between a licence holder and a person that wishes to acquire a licence. When acquired from the TCB, the licence fee is $200. The highest actual price for a standard taxi licence transfer in Winnipeg in 2015 was $430,000. (Taxicab Industry Data Report, 2015) In the three years before that the highest value was over $500,000. The actual transfer value is negotiated between the buyer and seller with the funds payable to the seller. It can be affected dramatically by government regulatory decisions to issue more licences, impose other restrictions or the effect of the competitive forces in the market.</td>
</tr>
</tbody>
</table>
Depending on the owner’s financial situation, some portion of the capital investment could be financed through long term debt. Repayment of the principal portion of the debt is not included in the expenses in previous pages. It must be repaid out of Net Income as discussed previously.

Industry Benchmarks
In September 2015, IBISWorld issued an industry report on “Taxi and Limousine Services in Canada”. Some key financial performance excerpts from the IBISWorld report:
- Total revenue for the industry in Canada was expected to be $2.7 billion in 2015
- Average annual growth is anticipated to be 1.9 per cent over the next five years
- Wages make up about 44.8 per cent of revenue
- Vehicle expenses represent a significant component of revenue including Fuel (15.0 per cent), Depreciation (3.9 per cent), the cost of financing the purchase or lease of the taxicab business licence, and other costs associated with maintaining and operating the taxi.

5.0 TRENDS AND ISSUES IN THE TAXICAB INDUSTRY
- The taxi industry is highly influenced by, and tends to fluctuate with economic conditions. Increased consumer spending and corporate growth in the past five years have been generally favourable for the taxi industry in Canada. IBISWorld data forecasts a further 23 per cent growth to $2.7 billion in the industry by 2015 (IBISWorld, 2015) or an average annual growth rate of just under three per cent.

Strict regulation limits the industry’s growth, however, as the number of taxis is fixed in most metropolitan areas. Increased consumer spending also tends to result in new vehicle sales, which can reduce demand on taxis. Nonessential segments of the industry, such as luxury limousine and town car services, tend to be the most affected. Many jurisdictions are now requiring taximeters to be GPS enabled, with automatic uploads so that enhanced trip data can be collected. While not yet in the market, driverless car technology is in various stages of development at automobile manufacturing and technology companies and may have a significant impact on the taxi industry in the coming decade.

- The biggest technological impact on the industry over the past five years has been the introduction of transportation network companies (TNCs) that connect passengers with drivers of private vehicles for hire using mobile applications. Taxi companies have responded with development of mobile applications, however generally have not reached the same level of sophistication as the leading TNC, Uber. Taxi dispatch systems, traditionally managed by centralized radio operators, are expected to evolve to more automated systems based on GPS over the next five years.

Many jurisdictions are now requiring taximeters to be GPS enabled, with automatic uploads so that enhanced trip data can be collected. While not yet in the market, driverless car technology is in various stages of development at automobile manufacturing and technology companies and may have a significant impact on the taxi industry in the coming decade.

- Over the past decade, many Canadian taxi companies have increased the number of hybrid vehicles in their fleets as a result of high gasoline prices and greater concern for the environment. Almost the entire standard taxi fleet in Winnipeg are hybrid vehicles with lower emissions and greater fuel economy. As a result, the extent to which people use taxi services instead of their own car helps to reduce the impact of traffic congestion and road transportation
on the environment. Increased use of taxi service has also been correlated with increased use of public transit, both related to a decrease in demand for and use of personal vehicles and the associated environmental impact.

- **The safety and security of both taxicab drivers and customers are an ongoing concern for regulatory bodies and industry stakeholders.** The use of cellular phones by taxicab drivers while transporting passengers is prohibited. Manitoba drivers can also be ticketed for not wearing a seat belt or for each passenger under the age of 18 who is not properly secured in a seat belt or child car seat. Taxicab drivers must wear a seat belt at all times when they are not carrying passengers; however, are not required to wear a seat belt should he/she feel that their personal safety is at risk. Taxicab drivers may refuse a trip if they see a passenger in possession of a weapon or generally if they feel their personal safety is at risk. They also have the right to refuse to allow a passenger to sit in the front seat.

  Safety equipment such as in-car cameras, panic buttons, roof top strobe lights and driver shields have been mandated by the Taxicab Board in recent years. (Winnipeg’s Crime Severity Index is higher than the Canadian average and violent crime continued to account for approximately one-fifth of all police-reported Criminal Code offences in Canada (excluding traffic violations).

- **An aging population has increased demand for accessible services in the taxi industry.** While less than seven per cent of the population under age 44 has a disability, this increases to over 26 per cent by age 65 and 43 per cent for people 75 years of age or older (Statistics Canada, 2013) Mobility-related disabilities represent about half of the reported disabilities in Manitoba.

  Taxi regulations in Winnipeg establish standards for accessible taxi service, including vehicle requirements, priority for people requiring accessible service and driver training.

- **Differing positions around regulation versus deregulation of this industry continue to exist.** Being able to access on demand, door to door transportation is recognized as an essential service, that when coupled with public transit, contributes to a thriving city. The major reasons cited in support of regulation of this industry are to ensure:
  - accessible and timely service through all areas of the community
  - quality service standards are established and met
  - consumers and those working in the industry are safe
  - the industry remains viable

  While recognizing that limited regulations may be justified to protect public safety, many economists argue that unregulated entry and fares will produce lower fares, a higher level of service to customers, and service innovations (Schaller, 2007). The Competition Bureau of Canada tends to agree that regulations should be limited to what is needed to protect the public and taxi operators from harm (Competition Bureau, 2014).

  There have been some arguments that market regulation has the undesired consequences of price pressures and the development of a “black market”. One of the key determinants of the impact of regulation is the extent to which the municipal authority issues new licences. Some municipalities issue licences every year according to a pre-defined formula that considers various
factors such as population growth, economic growth and transit ridership. Other municipalities have few if any new licences over time. The value of a taxi licence in the secondary market is primarily determined by the extent to which the municipality restricts the supply of new licences.

Too few licences can result in poor service in less dense areas, particularly during peak hours when large numbers of taxis are responding to the demand in entertainment districts. There is also an argument that restrictions about where passengers can be picked up, such as in neighbouring municipalities, results in “empty taxi miles”. This results in a need for higher fares, negative impacts on the environment and greater traffic congestion. The Conference Board of Canada (2013) concluded that higher fares will reduce demand for taxis and encourage the use of more private vehicles. This will have further negative impacts on the environment, increase incidents of impaired driving and result in greater traffic congestion and more parking demand.

The impact of de-regulation, particularly entry controls, has been shown to have a differing effect on the two sub-markets of the industry -- taxi stands / street hails and dispatch.

When implemented in the cab stand/street hail (walk-up) market, open entry has led to an oversupply of taxis. Oversupply has resulted in fare revenues too low per driver to support quality vehicles, acceptable driver incomes and industry accountability for service. The arrival of additional drivers did not improve taxi availability since there had been no shortage of service at these stands. The oversupply tended to persist, and did not return to a market balance even over time. Low entry costs, lack of information, low skill levels of drivers and lack of other employment opportunities tended to lead drivers to be willing to accept the circumstances in order to be self-employed.

One of the central criticisms of entry controls is the potential for shortfalls in dispatch service availability. Geographic imbalances occur as drivers cluster in the more lucrative downtown and airport markets rather than wait for calls in outlying neighbourhoods. Failure to issue new licences, even as demand increased with population or economic activity, has tended to enhance this effect. Dispatch companies also had difficulty attracting drivers due to otherwise easy access to fares through street hails or cab stands. Geographic imbalances were seen in both open and controlled entry cities, suggesting that market characteristics and not regulatory policies underlie the problem of geographic imbalances.

Jurisdictions that controlled access to walk-up but not dispatch markets showed more positive results. This is particularly the case where ‘company level’ qualifications were required to operate in the dispatch market. Company level entry qualifications can involve requirements for fleet size, place of business (neighbourhood based) and dispatch systems. In some cases, companies were allowed to add or subtract from their fleet as demand required, without regulatory approval (Schaller, 2007).

- **The emergence of Transportation Network Companies (TNCs) is the primary driver of regulatory reform considerations on a global basis.** Transportation Network Companies (TNC) are organizations that provide prearranged transportation services for compensation using a mobile application (App) or platform to connect passengers with drivers using their personal vehicles. While several TNCs have emerged, including Lyft, Sidecar, and Split, Uber is the most
well-known and pervasive. Key features of the Uber business model include use of drivers’ personal vehicles that may pick up trip requests on an as-and-when basis. A mobile application for GPS enabled smartphones allows the passenger to order a ride and track its progress, see a picture of the vehicle and ratings for the driver, pay automatically via a credit card number registered on the App, and receive an electronic receipt. Fares are generally lower than regulated rates, however are subject to surge pricing during periods of peak demand. Both drivers and passengers rate each other on a five star scale after a ride (Mowat Centre, 2015).

As indicated by the extraordinary growth in five years, TNC service is popular with both customers and drivers. The following are some of the reasons for this popularity:

- customers appreciate the convenience of the App
- customers are able to see the location of the car is on its way to them, they know in advance who the driver will be as well as the estimated fare and they can follow the car’s progress on the App to know if it is on the most efficient route
- customers can pay with a cashless, automated transaction at the end of the trip through pre-loaded credit card information in the App

Some advocate that TNCs reduce waiting times because there are increased numbers of vehicles for hire, the dispatch system is much better and there are incentives (driver rating) for drivers to provide prompt service. Uber reports experience in Chicago, New York and Boston where a high percentage of trips are in underserved neighbourhoods (Uber, 2016).

The taxi industry has voiced significant concern that the unrestricted entry of TNCs into otherwise regulated markets has created unfair competition and presents a significant threat to the viability of the taxi industry. A TNC driver typically is not required to hold a taxicab business licence or a taxicab driver licence, to complete the same training or background checks, invest in the same equipment, or charge established fares. The driver’s licence, registration and insurance for a TNC driver is often based on standards for passenger cars/drivers or otherwise determined by the jurisdiction. Uber’s response to questions of safety is that its technology enables the company to focus on rider and partner safety, by requiring end-to-end insurance, a code of conduct for both riders and drivers, anonymous phone numbers, safe pick-ups (stay inside until driver arrives), partner-driver screening, driver ratings and profiles.

Uber has recently made efforts to make clear that drivers are not employees, but part-time independent contractors in response to actions from drivers seeking to recover certain expenses or vacation pay and minimum wage protection (Harris, 2015).

In Winnipeg, under The Taxicab Act and regulations Uber would be considered similar to a dispatch company. However, anyone operating a vehicle under Uber in Winnipeg would be breaking the law if they did not have a taxicab business licence and a taxicab driver’s licence and meet the associated requirements for vehicle safety standards, commercial and liability insurance, training and the fare structure.

Some jurisdictions, including several European countries and Canadian cities such as Vancouver, have enacted regulations or taken legal action to explicitly prevent the operation of TNCs. Others have treated TNCs as un-licensed ‘bandit’ taxis and have taken law enforcement action against
them (Montreal, Ottawa and Toronto (Competition Bureau, 2015)). Ottawa and Toronto are now considering the enactment or revision of bylaws to allow operation of TNCs.

Regulatory frameworks for TNCs have been adopted by a number of US regulators, but are still in their relative infancy. These regulatory frameworks generally treat TNCs as a separate class of service provider in vehicle-for-hire legislation. They appear to be intended to ensure that TNCs and their drivers are subject to safety and consumer protection rules similar to those that apply to taxis, particularly with respect to minimum insurance requirements, criminal and driving background checks on drivers, and vehicle inspections. Most propose fewer restrictions on vehicle size and age, accessibility requirements or number of vehicles, although also propose fewer privileges, as TNC drivers are not allowed to accept street hails or use taxi stands (Competition Bureau, 2015).

Edmonton has recently become the first Canadian city to enable activity by TNCs by establishing a separate class of “Personal Transportation Provider” (PTP), and applying many of the same provisions as regulators in the U.S. While maintaining a minimum rate ($3.25) for any pre-arranged trip, rates may otherwise be negotiated by both taxis and PTP’s. Only taxis are permitted to pick up at taxis stands and street hails, and prescribed metered rates apply. Individual licence fees for ‘Commercial’ PTP drivers are replaced by a per-trip fee of $0.06 and a ‘bulk’ fee of $50,000 per year applied to the TNC, plus a $20,000 accessibility surcharge. Drivers are required to provide proof of insurance and class of driver’s licence, undergo criminal record checks and annual vehicle inspections, all on the same basis as is required for taxis.

6.0 OTHER JURISDICTION MODELS

MNP conducted primary and secondary research of other jurisdictional models and practices related to this industry. This can provide valuable information to inform the future decisions about changes in policy and practice. The following jurisdictions were included in this research:

- Calgary, Alberta
- Edmonton, Alberta
- Hamilton, Ontario
- Ottawa, Ontario
- Vancouver, British Columbia

The tables on the next two pages provide summary information of this research.
The following table provides a high level comparison of each jurisdictional area.

Table 4: Summary of Jurisdictional Areas

<table>
<thead>
<tr>
<th></th>
<th>Calgary</th>
<th>Edmonton</th>
<th>Hamilton</th>
<th>Ottawa</th>
<th>Vancouver</th>
<th>Winnipeg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drivers Licence</td>
<td>Professional</td>
<td>Professional</td>
<td>General</td>
<td>General</td>
<td>Commercial</td>
<td>Professional</td>
</tr>
<tr>
<td>Criminal Records</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Driving Records</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Service &amp; Skills Training</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>English Proficiency</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Insurance</td>
<td>Commercial</td>
<td>Commercial</td>
<td>$500,000 limo; $2 MM taxi</td>
<td>$2 MM; $1 MM Limo</td>
<td>Commercial</td>
<td>Commercial</td>
</tr>
<tr>
<td>Safety Inspections</td>
<td>6 mo.; Annual for stretch</td>
<td>Annual, all</td>
<td>Annual; 2/yr if over 3 yrs. old</td>
<td>Annual &lt;5 years old; 6 mo. if older</td>
<td>6 mo.</td>
<td>6 mo.</td>
</tr>
<tr>
<td>Vehicle Age Restriction</td>
<td>8 years</td>
<td>No</td>
<td>6 years; 7 if hybrid; 10 if accessible</td>
<td>8 years</td>
<td>7 years</td>
<td></td>
</tr>
<tr>
<td>Camera (taxi)</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Meter Required</td>
<td>Yes, with Printout</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Shield Required</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>TNC/PTP Permitted</td>
<td>Yes</td>
<td>Yes</td>
<td>Pending</td>
<td>Under Consideration</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Note: Taxi – no restriction Executive car – 8 years Classic limo – 25 years or more Premium / speciality vehicle limo – 5 years (standard and accessible)
<table>
<thead>
<tr>
<th></th>
<th>Calgary</th>
<th>Edmonton</th>
<th>Hamilton</th>
<th>Ottawa</th>
<th>Vancouver</th>
<th>Winnipeg</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Taxi Licence Fee</strong></td>
<td>$135 Reg Cert. +$877/yr; $220/yr AT</td>
<td>$400</td>
<td>$4,384; $605 renewal</td>
<td>$584*</td>
<td>$559 + PTB fee ($100-200) $179 Handicab</td>
<td>$200; $100 AT</td>
</tr>
<tr>
<td><strong>Transfer Fee</strong></td>
<td>$877 app; $438 tsf</td>
<td>$930</td>
<td>$769</td>
<td>$3,800</td>
<td>$136</td>
<td>$400</td>
</tr>
<tr>
<td><strong>Driver Licence Fee</strong></td>
<td>$135 annual renewal; $220 TNC driver</td>
<td>$100/2 years driver (all)</td>
<td>$281; $209 renewal</td>
<td>$217*</td>
<td>$70 record check</td>
<td>$30 annual renewal</td>
</tr>
<tr>
<td><strong>Driver Training Cost</strong></td>
<td>$330</td>
<td>Provided by dispatchers</td>
<td>$500</td>
<td>$1,200 Program currently being revised</td>
<td>$550</td>
<td>$300 + $100 for Accessibility Training</td>
</tr>
<tr>
<td><strong>Dispatch / Broker Fee</strong></td>
<td>$1,753 app; $1,753/yr</td>
<td>$1,000; $50,000 + $20,000 surcharge + $0.06 per trip</td>
<td>$1,143; $1,038 renewal</td>
<td>$741 (1-24) $2,270 (25-99) $6,671 (100+)</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td><strong>Limousine Licence Fee</strong></td>
<td>$703</td>
<td>$400</td>
<td>$678 new; $606 renewal</td>
<td>Owner $996; $600/vehicle/year</td>
<td>$129 per office + $213 per vehicle</td>
<td>$200</td>
</tr>
<tr>
<td><strong>Limousine Fare</strong></td>
<td>$84.60 per hour; zone fares + surcharges</td>
<td>$60 per hour $110 per day</td>
<td>$67.50 for first 90 min; $45 each additional</td>
<td>No</td>
<td>Min $44.70/hr Max $96; $170 specialty</td>
<td>No</td>
</tr>
<tr>
<td><strong>Taxi Fare</strong></td>
<td>$3.80; $1.67/km max; no prescribed rate if booked on app</td>
<td>No</td>
<td>3.90; $1.80/km</td>
<td>$3.45; $1.07/km</td>
<td>$3.20; $1.84/km</td>
<td>$3.50; $1.38/km Handicab van $12.40 + $1.38/km</td>
</tr>
</tbody>
</table>