

Calgary



Taxi Drivers' Satisfaction Survey

November 2015





Context:

- The Taxi and Limousine Advisory Committee (TLAC) has been mandated to conduct drivers' satisfaction research regarding taxi and limousine services in Calgary.
- This is the initial benchmark survey. It was conducted after exploratory qualitative research which informed the design of the survey.
- The data collection for this survey occurred simultaneously with discussions on potential bylaw amendments and Uber's official entrance to the market. These factors may have impacted drivers' responses to the survey.
- TLAC aims to track drivers' satisfaction with Livery Transport Services, TLAC's performance, and their overall job satisfaction.

This report represents the findings from the 2015 telephone and web survey with 265 Calgary taxi and accessible taxi drivers.

Objectives:

- The core objectives of the survey are to:
 - Identify driver satisfaction as customers of brokers
 - Identify driver satisfaction as stakeholders of TLAC
 - Identify driver satisfaction as customers of The City's licensing and enforcement authority (Livery Transport Services).



Data Collection

- Prior to conducting this survey, Leger conducted two focus groups (June 16th) to gather input from taxi and accessible taxi drivers. Information gleaned from these groups was used to develop the quantitative survey.
- For the quantitative survey, Leger conducted telephone interviews and online surveys. For the online component Leger sent an invitation (including a unique link to the survey) to each client identified in the database supplied by TLAC. The database provided to Leger included taxi drivers' emails, phone numbers, or both. If no e-mail was available, Leger contacted the respondents by phone.
- Data were collected between September 29th and October 25th, 2015.
- In total, 580 invitations were sent to taxi drivers and a total of 265 respondents completed the survey (106 via web, 159 via phone).
- The overall response rate is 46%.

Target Respondents

- Taxi drivers and accessible taxi drivers who drive their taxi in Calgary, are over 18 years of age, and currently hold a valid City of Calgary approved Taxi Drivers License
- In the report, the following definitions are used:
 - Drivers- indicates taxi and accessible taxi drivers in Calgary who are working full time, part time, or not currently working
 - Drivers (FT/PT)- indicates taxi and accessible taxi drivers in Calgary who are currently working full or part time

Margin of Error

- The margin of error for a sample size of 265 from a population of 580 is $\pm 4.4\%$ (19 times out of 20)



Throughout this report, we have analyzed responses using a sub-segment analysis based on taxi drivers' ownership of their license plate and vehicle.

The following chart summarizes the three segments that have been analyzed:

Segment Name	Own License Plate?	Own Vehicle?
Owner/Operator	Yes	Yes
Lessee	No	No, lease vehicle
Vehicle owner/plate lessee	No	Yes

Executive Summary



While more than two-thirds of drivers (69%) are satisfied with their brokerage, the level of satisfaction is dependent on the type of driver answering – Independent owner/operators are very satisfied (80%) while fewer than six-in-ten lessee's are satisfied with their brokerage. Those who are satisfied tend to give relatively generic reasons for their satisfaction, whereas those who are dissatisfied have very specific complaints (e.g. expensive charges, poor dispatch services, lack of support etc.).

Drivers are generally pleased with the brokerage's handling of complaints (66%) and the setting of fair and reasonable rules (64%). However, there is a strong sense that the brokerage is not being flexible with the fees they charge (41% satisfied).

About two-thirds of drivers (62%) (of all types) are satisfied with the dispatch service they receive. Generally, they are most satisfied with the timeliness of pre-arranged bookings (71%) and the quality of the technology (71%). While still a majority, drivers are less satisfied with dispatchers treating them with respect (65%) and operators following up with waiting customers to see if they still need a ride (58%).

Livery Transport Service gets higher marks with seven-in-ten (70%) drivers being satisfied - Independent owner/operators give LTS particularly high scores (82%).

LTS is strongly perceived to be treating drivers with respect (79%), providing high quality driver training (75%) and adequately enforcing the bylaws (74%). However, satisfaction is lower for LTS in terms delivering value for money for fees paid (35%) and being open and transparent about how their budget is spent (39%).



There is relatively good awareness with TLAC's roles and responsibilities (67% claiming some awareness) and this is consistent for all the driver types. There is, however, low attendance at TLAC meetings (16%) and website visitation (36%). Independent owner/operators are twice as likely to have attended a meeting (29%) but no more likely to have visited the website (34%).

Among those aware of TLAC's roles and responsibilities, just over half (55%) are satisfied with TLAC's performance.

Opinions about TLAC are very mixed, with almost eight-in-ten (79%) agreeing that there should be more driver representatives on the Committee and three-quarters wanting to know more about TLAC. However, few agree that TLAC spends its money wisely (38%) or that committee members are accessible outside of scheduled meeting times (45%).

Economic and market change pressures appear to be weighing heavily on the drivers. Six-in-ten are satisfied with their jobs (59%) or are certain they will continue working as a taxi driver next year (61%). Again the owner/operators are more likely than other drivers to be satisfied and to say they are likely to continue working in the industry next year.

Attitudes towards the industry are relatively consistent among most drivers. Drivers are most likely to agree that the public needs to be better informed (94%), the job brings flexibility (86%) and that the industry is sufficiently monitored (83%). On the other side, few admit to negotiating off-meter prices (14%) and fewer than half would consider driving an accessible vehicle in the next year (47%).



As a baseline study results imply that drivers in Calgary are facing considerable economic pressures from the economic downturn, Uber's entry into the market and the increasing popularity of car share programs.

Many drivers are concerned about their ability to make a living – and not all are optimistic regarding their likelihood of continuing in the profession – and this is very likely overshadowing their perceptions of the industry as a whole.

Relationship with the Brokerages

For many, it is possible that their relationship with their brokerage defines their views of the industry and the profession. Generally, most drivers have positive feelings towards their brokerage, and feel they are supported, but there is a sense that the brokerage could be doing more to help insulate these drivers from the economic headwinds. This support can be tangibly demonstrated through a review of how and when fees are charged to drivers who are sick or whose vehicles are in for repairs.



Relationship with Dispatch

While drivers undoubtedly experience the occasional difficulty with dispatch, and this can colour their views, in general the relationship with the voices on the radio appears strong. The results hint at a sense of respect, fairness and equality that extends to all drivers.

Livery Transport Services

Livery Transport Services are the voice of good customer service. Drivers feel respected, protected and listened to by LTS. The drivers, especially the independent owner/operators appear to be strong advocates for LTS – a role they should be encouraged to play with other drivers. Despite the strong goodwill for LTS however, there is a strong need for greater transparency for the organization in terms of how its budget is spent and how drivers' fees are used. LTS can do a better job demonstrating the valuable role they play in their industry partners to improve their stature among drivers.

TLAC

While generally satisfied with TLAC, there may be opportunities to strengthen drivers' understanding of the Committee's roles and responsibilities. Even in these turbulent times, drivers are not going to the TLAC website or attending TLAC meetings so there may be other avenues the Committee could consider to reach out to the drivers. As well, drivers would strongly welcome a greater voice on the Committee with more driver representatives and a better understanding of how TLAC chooses its focus. As with LTS, TLAC can benefit from a more open and transparent disclosure system that shows drivers how the budget is spent. More accessible Committee members would also be welcomed.

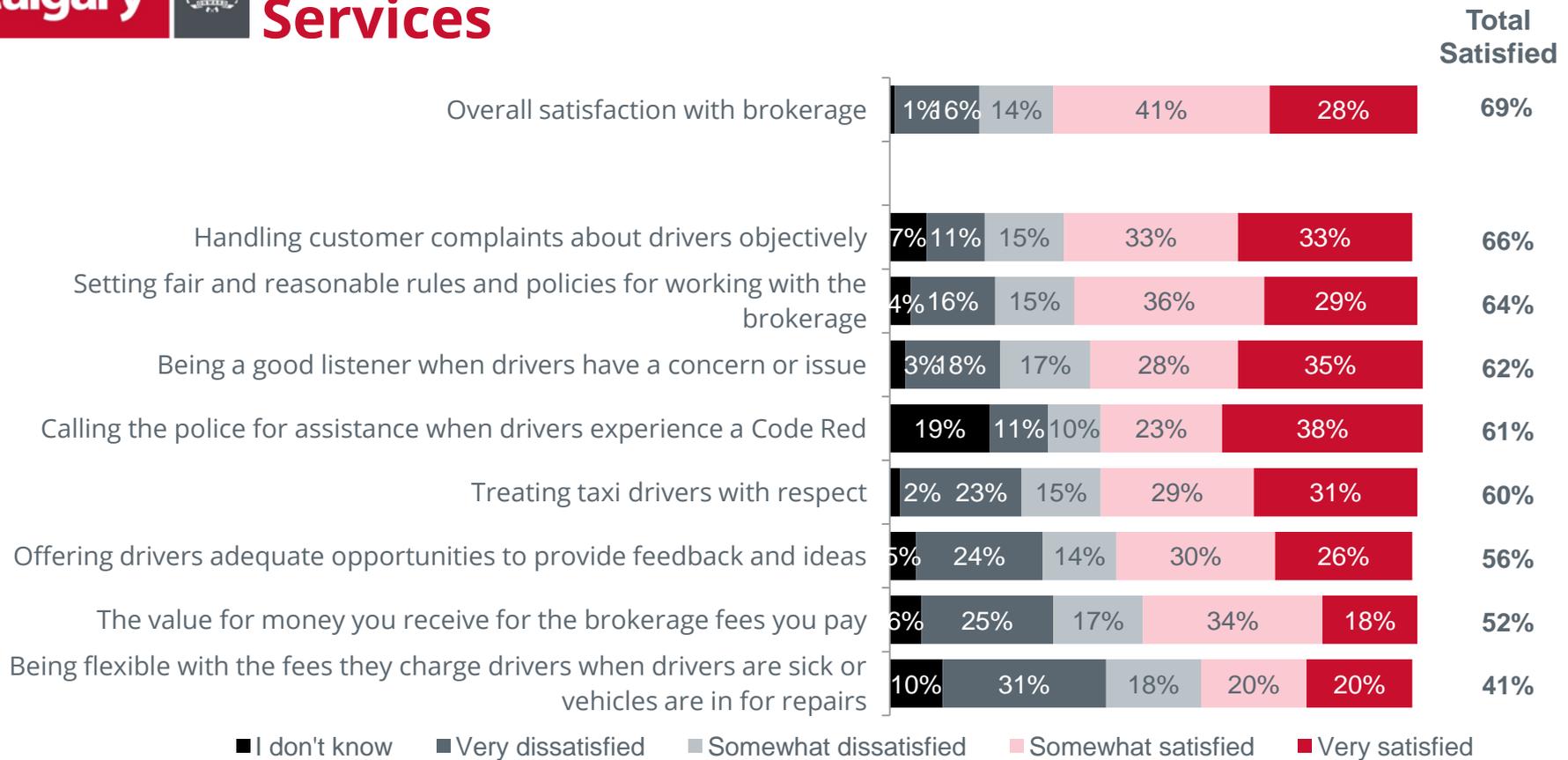
Attitudes Towards the Industry

Drivers' worries are evident in how they have responded to this survey. For example, they feel that there is a stronger need for the industry to better inform the public about the issues that are important to drivers, they want to be able to acquire their own insurance coverage, they feel there should be a centralized dispatch and they are generally OK with the current plate selection process. All of these attitudes (and others) may be pointing to the economic uncertainty many drivers are facing. In this environment, drivers are looking to the industry to protect their livelihoods and reduce their costs.

Drivers' Satisfaction With Broker



Drivers' (FT/PT) Satisfaction With Broker Services



Seven-in-ten (69%) drivers (FT/PT) are satisfied overall with the services they receive from their brokerage.

Drivers (FT/PT) are most satisfied that their brokerage handles customer complaints about drivers objectively (66%), and that it sets fair and reasonable rules and policies for working with the brokerage (64%). Drivers (FT/PT) are comparatively less satisfied with the value received from the brokerage fees they pay (52%), and their brokerage's flexibility with the fees charged to drivers when they are sick or their vehicles are in for repairs (41%).

Base: Drivers who are currently working full-time/part-time (n=207)

Q18 Overall, how satisfied or dissatisfied are you with the services you receive from your brokerage? Would you say you are... / Q.20 - Please now tell me how satisfied or dissatisfied you are with your brokerage for each of the following factors:



Sub-Segment Differences

Drivers' (FT/PT) Satisfaction With Broker Services

Satisfied (very, somewhat)	Owner /Operator (n=49)	Lessee (n=108)	Vehicle owner/ Plate lessee (n=41)
Overall satisfaction with brokerage	80%	58%	76%
Handling customer complaints about drivers objectively	71%	62%	68%
Setting fair and reasonable rules and policies for working with the brokerage	69%	63%	63%
Being a good listener when drivers have a concern or issue	73%	54%	68%
Calling the police for assistance when drivers experience a Code Red	67%	59%	61%
Treating taxi drivers with respect	63%	56%	56%
Offering drivers adequate opportunities to provide feedback and ideas	63%	51%	51%
The value for money you receive for the brokerage fees you pay	61%	46%	54%
Being flexible with the fees they charge drivers when drivers are sick or vehicles are in for repairs	49%	33%	46%

% is significantly higher than **%** in the same row

Base: Drivers who are currently working full-time/part-time

Q18 Overall, how satisfied or dissatisfied are you with the services you receive from your brokerage? Would you say you are... / Q.20 - Please now tell me how satisfied or dissatisfied you are with your brokerage for each of the following factors:



Reasons For Satisfaction Or Dissatisfaction With Broker

Dissatisfied (somewhat and very)	n=62
Expensive charges / Rent / Fees	34%
Poor dispatch services / System	16%
Not supportive / Not helpful / Don't care about driver	13%
Only care about the money we make for them	11%
Long delays / Wait time / Little work	11%
Threatening / Bullies	8%
Insurance issues	8%
It's a monopoly	6%
No rules / Regulations / Laws to protect the driver	6%
Not respected	5%
Rude	5%
Mistakes with accounts	3%
Limousine drivers given priority	3%
Other	10%
I don't know/I prefer not to answer	26%

Satisfied (somewhat and very)	n=142
Good / Satisfied with service	23%
No problems / Never had any issues	9%
Expensive charges / Rent / Fees	9%
Supportive / Helpful / Care about the driver	8%
Poor dispatch services / System	8%
Long delays / Wait time / Little work	6%
Good dispatch services	3%
Not supportive / Not helpful / Don't care about driver	3%
No rules / Regulations / Laws to protect the driver	2%
It's a monopoly	1%
Only care about the money we make for them	1%
Limousine drivers given priority	1%
Insurance issues	1%
Other	11%
I don't know/I prefer not to answer	27%

Among drivers (FT/PT) satisfied with their broker, the top reason for satisfaction is good service.

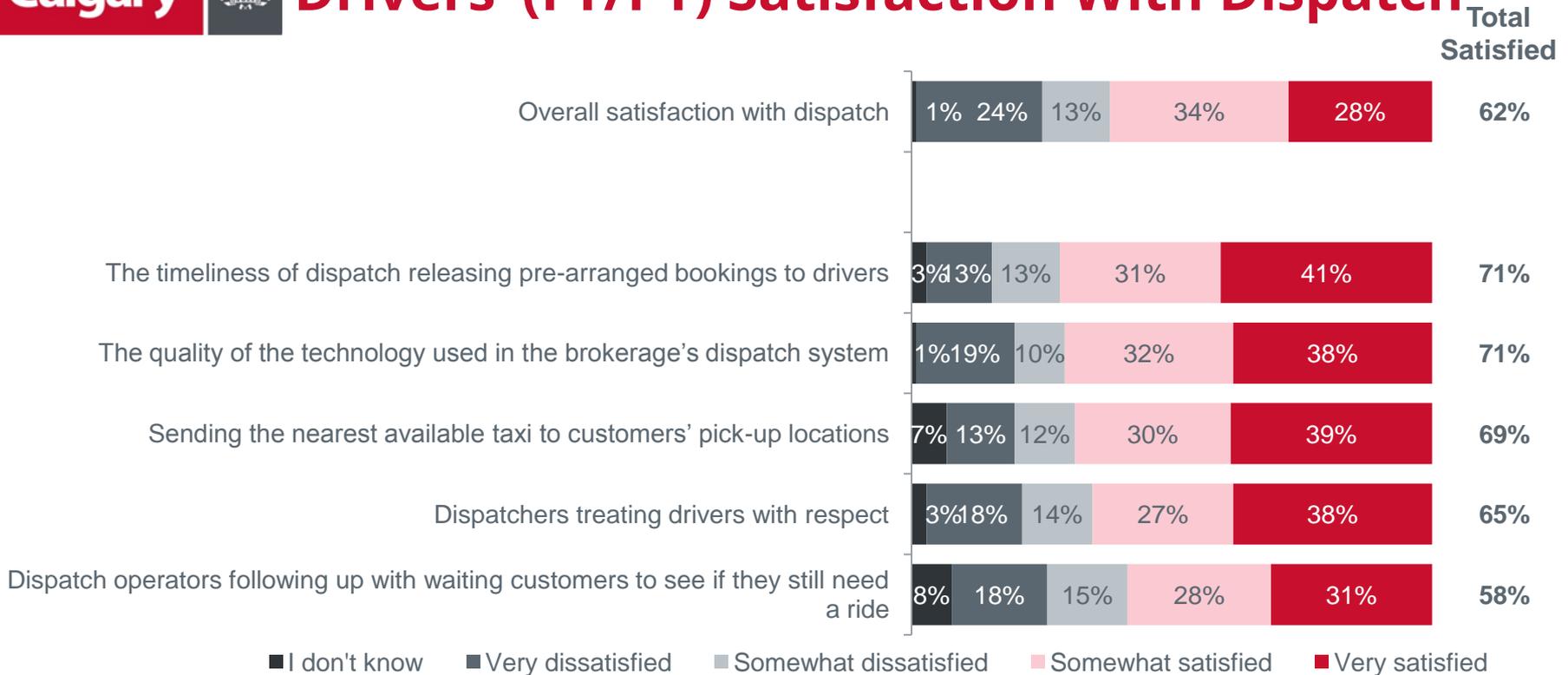
Among drivers (FT/PT) dissatisfied with their broker, the top reasons for dissatisfaction include expensive charges / rent / fees, and that the dispatch services / system is poor.

Base: All respondents that were satisfied or dissatisfied with overall services they receive from their brokerage
 Q19 Why do you say that you are [INSERT RESPONSE FROM Q18] with the services you receive from your brokerage?

Drivers' (FT/PT) Satisfaction With Dispatch



Drivers' (FT/PT) Satisfaction With Dispatch



About three-in-five (62%) drivers (FT/PT) are satisfied overall with their brokerage's dispatch services.

Satisfaction is highest in terms of dispatch's timeliness in releasing pre-arranged bookings (71%), and the quality of the dispatch system's technology (71%). Drivers (FT/PT) are comparatively less satisfied with dispatch operators following up with waiting customers to see if they still need a ride (58%).

Base: Respondents who are currently working full-time/part-time (n=207)

Q21 Overall, how satisfied or dissatisfied are you with your brokerage's dispatch services? / Q22 And how satisfied or dissatisfied would you say you are with each of the following features of your brokerage's dispatch services?



Sub-Segment Differences

Drivers' (FT/PT) Satisfaction With Dispatch

Satisfied (very, somewhat)	Owner / Operator (n=49)	Lessee (n=108)	Vehicle owner/ Plate lessee (n=41)
Overall satisfaction with dispatch	63%	59%	56%
The timeliness of dispatch releasing pre-arranged bookings to drivers	73%	70%	71%
The quality of the technology used in the brokerage's dispatch system	73%	64%	78%
Sending the nearest available taxi to customers' pick-up locations	73%	69%	66%
Dispatchers treating drivers with respect	73%	60%	66%
Dispatch operators following up with waiting customers to see if they still need a ride	65%	56%	51%

Satisfaction with dispatch services is consistent across all driver types, suggesting that all the drivers receive the same quality of service from their dispatch.

Base: Respondents who are currently working full-time/part-time

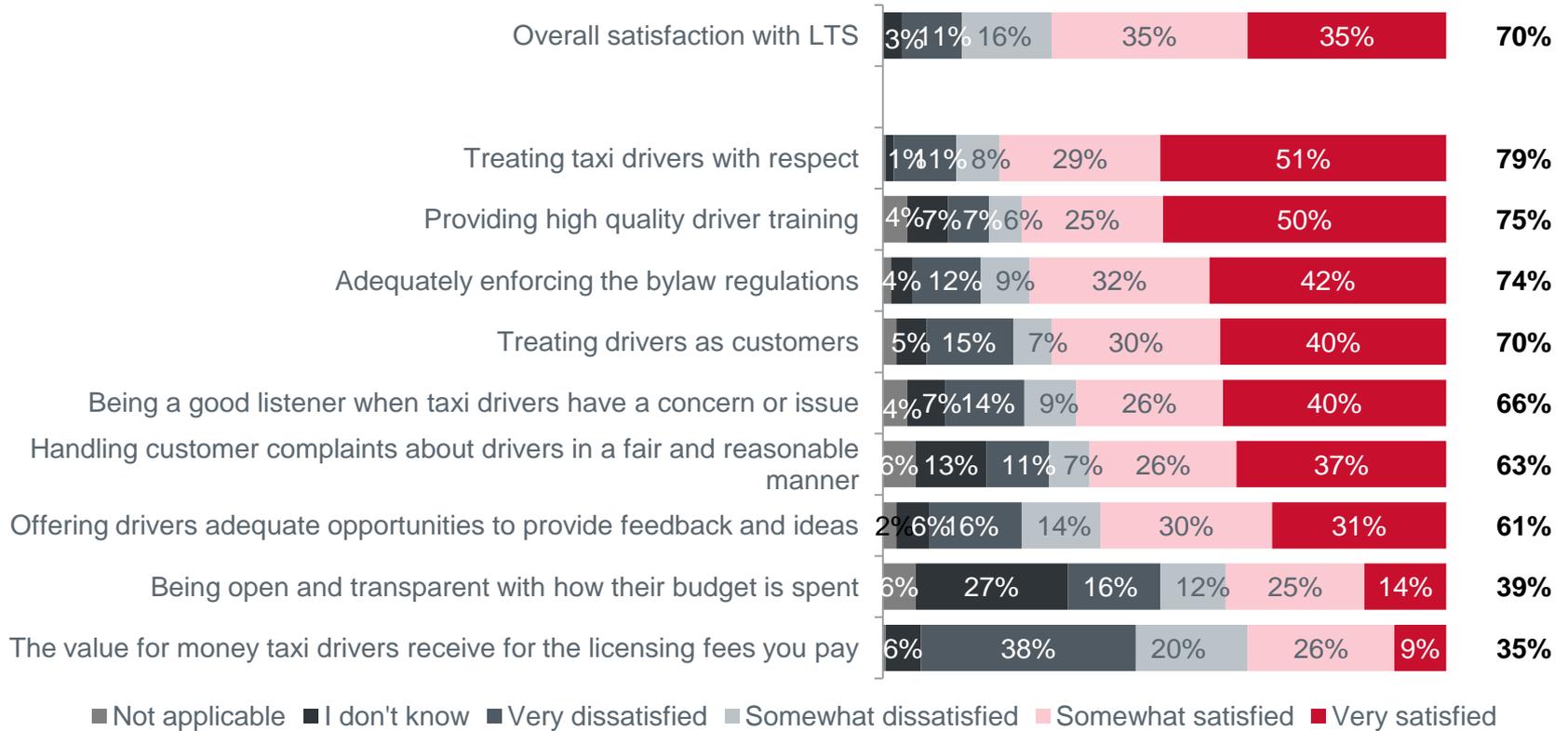
Q21 Overall, how satisfied or dissatisfied are you with your brokerage's dispatch services? / Q22 And how satisfied or dissatisfied would you say you are with each of the following features of your brokerage's dispatch services?

Drivers' (FT/PT) Satisfaction With Livery Transport Services (LTS)



Drivers' (FT/PT) Satisfaction With LTS

Total Satisfied



Seven-in-ten (70%) drivers (FT/PT) are satisfied with the services they receive from Livery Transport Services (LTS).

Drivers (FT/PT) are most satisfied that LTS treats taxi drivers with respect (79%), provides high quality driver training (75%) and adequately enforces the bylaw regulations (74%).

Less than two-in-five drivers (FT/PT) are satisfied with LTS being open and transparent about how their budget is spent (39%) and the value for money taxi drivers receive for licensing fees paid (35%).

Base: Respondents who are currently working full-time/part-time (n=207)

Q.23 - Overall, how satisfied or dissatisfied are you with the services you receive from Livery Transport Services? / Q25 Please now indicate how satisfied or dissatisfied you are with Livery Transport Services for each of the following factors:



Sub-Segment Differences

Drivers' (FT/PT) Satisfaction With LTS

Satisfied (very, somewhat)	Owner / Operator (n=49)	Lessee (n=108)	Vehicle owner/ Plate lessee (n=41)
Overall satisfaction with LTS	82%	69%	59%
Treating taxi drivers with respect	80%	81%	66%
Providing high quality driver training	84%	76%	66%
Adequately enforcing the bylaw regulations	76%	77%	63%
Treating drivers as customers	82%	68%	61%
Being a good listener when taxi drivers have a concern or issue	73%	63%	63%
Handling customer complaints about drivers in a fair and reasonable manner	73%	61%	56%
Offering drivers adequate opportunities to provide feedback and ideas	69%	59%	56%
Being open and transparent with how their budget is spent	37%	45%	22%
The value for money taxi drivers receive for the licensing fees you pay	43%	32%	39%

% is significantly higher than **%** in the same row

Base: Respondents who are currently working full-time/part-time

Q.23 - Overall, how satisfied or dissatisfied are you with the services you receive from Livery Transport Services? / Q25 Please now indicate how satisfied or dissatisfied you are with Livery Transport Services for each of the following factors:

TLAC – 2015 Drivers' Satisfaction Survey

Prepared by Leger for The City of Calgary



Reasons For Satisfaction Or Dissatisfaction With LTS

Dissatisfied (somewhat and very)	n=55
Expensive charges / Rent / Fees	22%
Not supportive / Not helpful / Don't care about the driver	15%
Don't listen to what we have to say	9%
Long wait time	7%
Care more for the brokers	5%
No rules / Regulations / Laws to protect the driver	5%
Good / Satisfied with service	4%
Lack of communication	2%
Threatening / Bullies	2%
License period is too short	2%
Lack of follow-up	2%
It's a monopoly	2%
Other	16%
I don't know/I prefer not to answer	40%

Satisfied (somewhat and very)*	n=145
Good / Satisfied with service	21%
No problems / Never had any issues	14%
Expensive charges / Rent / Fees	12%
Supportive / Helpful / Care about the driver	8%
Friendly / Courteous	4%
Respectful	4%
Not supportive / Not helpful / Don't care about the driver	3%
Lack of communication	3%
Long wait time	3%
Care more for the brokers	2%
They listen to the drivers	2%
Other	10%
I don't know/I prefer not to answer	30%

Among drivers (FT/PT) satisfied with the overall services received from LTS, the top reasons for satisfaction are that the service is good (21%), and they have not had problems or issues (14%).

Those dissatisfied with the overall services received from LTS indicate their dissatisfaction is because of the expensive charges / rent / fees (22%), and that LTS is not supportive or helpful, and doesn't care about the driver (15%).

Base: All respondents that were satisfied or dissatisfied with overall services they receive from LTS

*Mentions less than 1% are not listed

Q24 Why do you say that you are [INSERT RESPONSE FROM Q23] with the services you receive from Livery Transport Services?

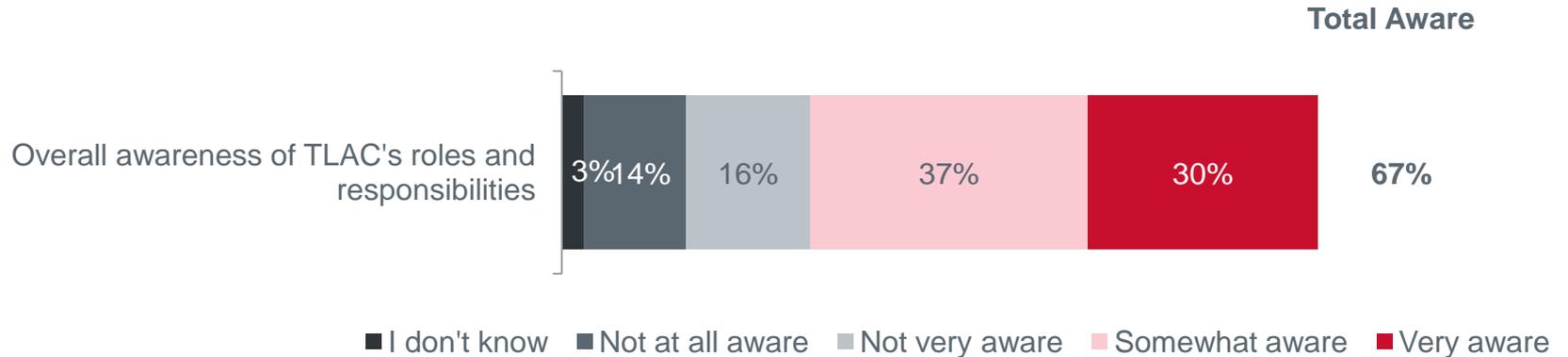


Drivers and TLAC





Drivers' (FT/PT) Awareness Of TLAC's Roles and Responsibilities



Two-thirds of drivers (FT/PT) are aware of TLAC's roles and responsibilities.

Base: Respondents who are currently working full-time/part-time (n=207)

Q26 To what extent are you aware or unaware of the roles and responsibilities of the Taxi and Limousine Advisory Committee, or TLAC? Would you say you are...



Sub-Segment Differences

Drivers' (FT/PT) Awareness Of TLAC's Roles and Responsibilities

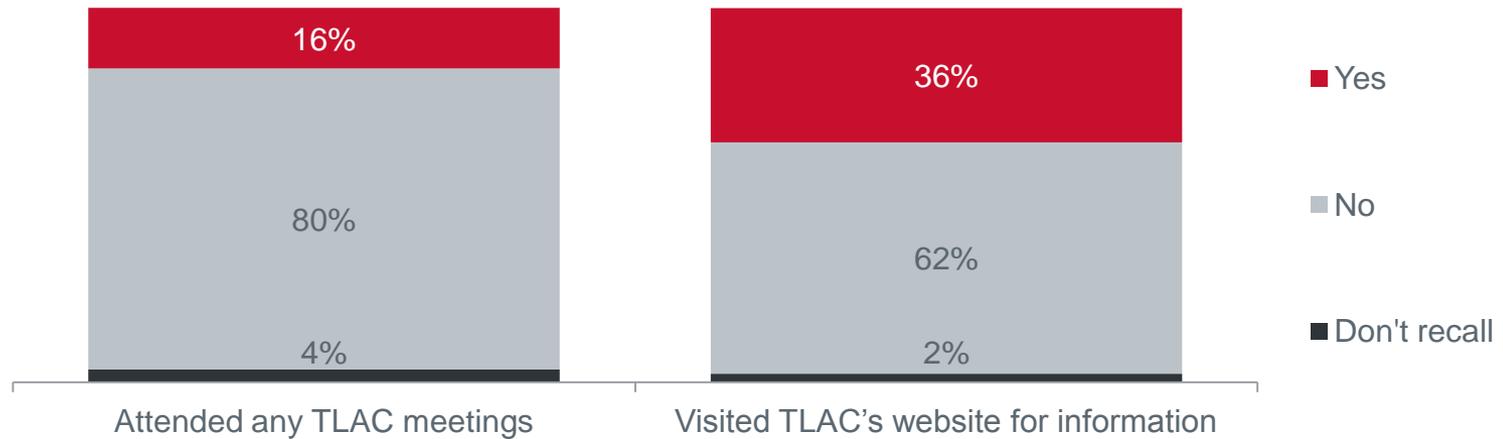
Aware (very, somewhat)	Owner / Operator (n=49)	Lessee (n=108)	Vehicle owner/ Plate lessee (n=41)
Overall awareness of TLAC's roles and responsibilities	69%	65%	59%

Base: Respondents who are currently working full-time/part-time

Q26 To what extent are you aware or unaware of the roles and responsibilities of the Taxi and Limousine Advisory Committee, or TLAC? Would you say you are...



Website Visitation and Meeting Attendance (past year)



In the past year, one-in-six drivers (FT/PT) who are aware of TLAC's roles and responsibilities have attended a TLAC meeting (16%), while over one-third (36%) have visited TLAC's website for information.

Base: All respondents somewhat/very/not very aware of TLAC's roles and responsibilities (n=173)
 Q27 Within the past year, have you personally...



Sub-Segment Differences

Website Visitation and Meeting Attendance (past year)

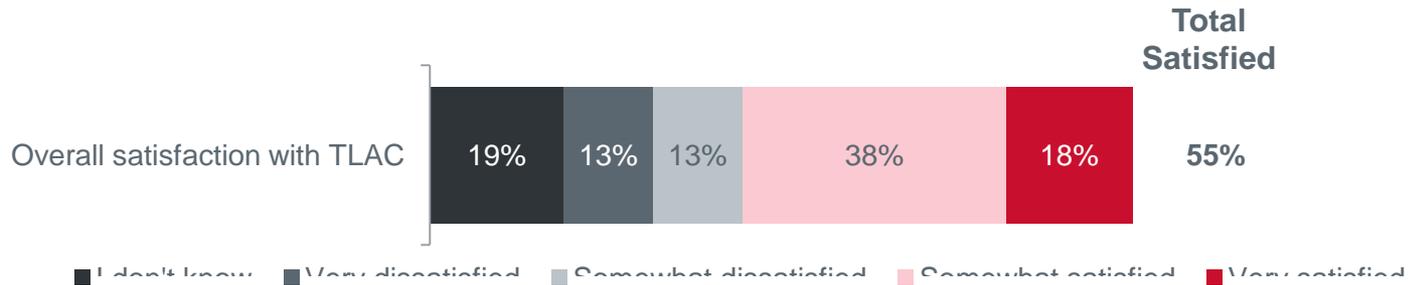
% Yes	Owner / Operator (n=41)	Lessee (n=86)	Vehicle owner/ Plate lessee (n=33)
Attended any TLAC meetings (past year)	29%	14%	15%
Visited TLAC website (past year)	34%	35%	30%

Owner/Operators are twice as likely to have attended TLAC meetings than either of the other driver types.

Base: All respondents somewhat/very/not very aware of TLAC's roles and responsibilities
 Q27 Within the past year, have you personally...



Drivers' (FT/PT) Overall Satisfaction With TLAC (among those aware of roles, responsibilities)



Base: Base: All respondents somewhat/very/not very aware of TLAC's roles and responsibilities (n=173)

Dissatisfied (somewhat and very)	n=44
Too many plates being issued	11%
Lack of communication	9%
Not supportive / Not helpful / Don't care about the driver	7%
Don't listen to what we have to say	7%
Uber is starting up	7%
Expensive charges / Rent / Fees	5%
Limousine issues	5%
Care more for the brokers	5%
It's a monopoly	5%
Good / Satisfied with service	2%
No rules / Regulations / Laws to protect the driver	2%
Other	18%
I don't know/I prefer not to answer	36%

Satisfied (somewhat and very)	n=96
Good / Satisfied with service	10%
Uber is starting up	7%
Supportive / Helpful / Care about the driver	5%
No problems / Never had any issues	5%
Too many plates being issued	4%
Lack of communication	2%
Expensive charges / Rent / Fees	2%
Don't listen to what we have to say	2%
Respectful	2%
No rules / Regulations / Laws to protect the driver	2%
Not supportive / Not helpful / Don't care about the driver	1%
Limousine issues	1%
Other	7%
I don't know/I prefer not to answer	50%

Over half (55%) of drivers (FT/PT) who are aware of TLAC's roles and responsibilities are satisfied overall with TLAC. Reasons for satisfaction tend to be fairly generic, with half not being able to articulate any reason why they are satisfied, whereas dissatisfied drivers have very specific concerns.

Q28 Overall, how satisfied are you with TLAC's performance this past year? / Q29 Why do you say that you are [INSERT RESPONSE FROM Q28] with TLAC's performance this past year?



Sub-Segment Differences

Drivers' (FT/PT) Overall Satisfaction With TLAC (among those aware of roles, responsibilities)

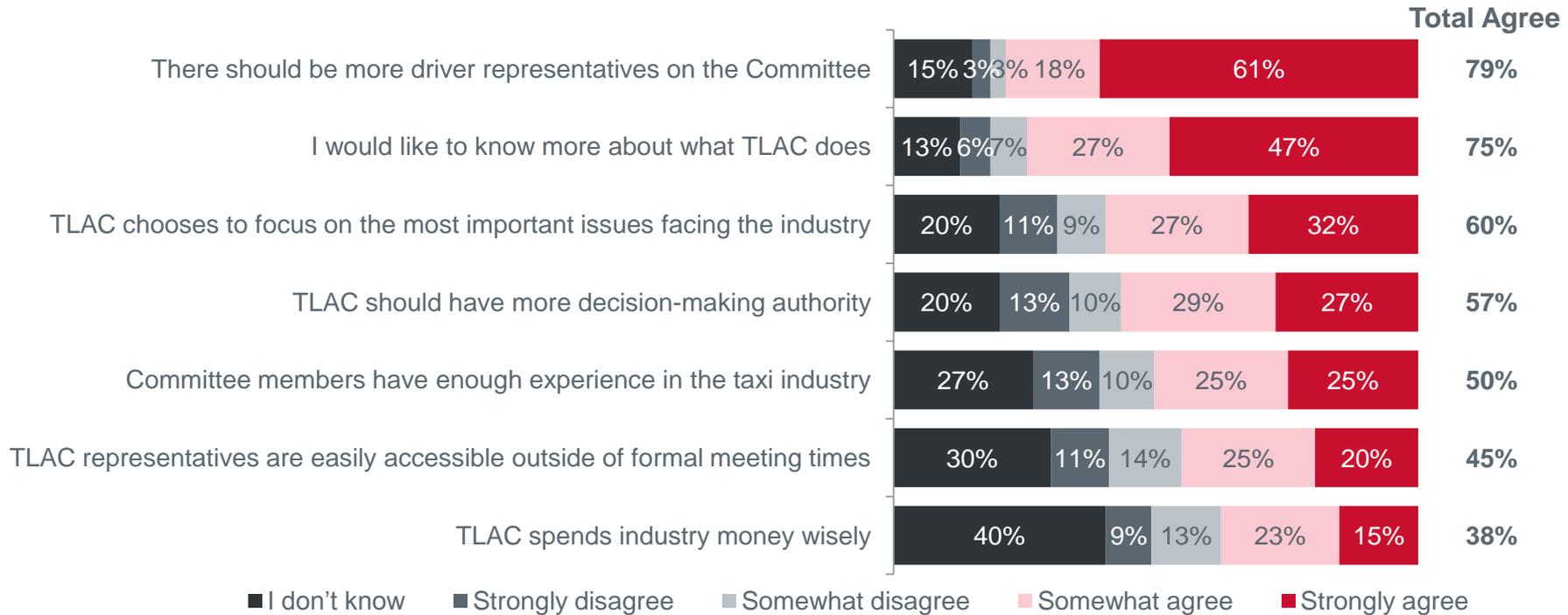
Satisfied (very, somewhat)	Owner / Operator (n=41)	Lessee (n=86)	Vehicle owner/ Plate lessee (n=33)
Overall satisfaction with TLAC	49%	57%	52%

Base: All respondents somewhat/very/not very aware of TLAC's roles and responsibilities

Q28 Overall, how satisfied are you with TLAC's performance this past year? / Q29 Why do you say that you are [INSERT RESPONSE FROM Q28] with TLAC's performance this past year?



Drivers' Opinion On TLAC (among those aware of roles, responsibilities)



Drivers (FT/PT) who are aware of TLAC's roles and responsibilities are in higher agreement that there should be more driver representatives on the Committee (79%) and that they would like to know more about what TLAC does (75%).

Less than half of these drivers (FT/PT) agree TLAC representatives are easily accessible outside of formal meeting times (45%) and that TLAC spends industry money wisely (38%).

A range of 13%-40% of drivers (FT/PT) do not know whether they agree or disagree with the various statements on TLAC, suggesting an opportunity for further education on these aspects.

Base: All respondents somewhat/very/not very aware of TLAC's roles and responsibilities (n=173)
Q.30 - Thinking of the Taxi and Limousine Advisory Committee, to what extent do you agree or disagree with each of the following statements about TLAC:



Sub-Segment Differences

Drivers' Opinion On TLAC (among those aware of roles, responsibilities)

Agree (strongly, somewhat)	Owner / Operator (n=41)	Lessee (n=86)	Vehicle owner/ Plate lessee (n=33)
There should be more driver representatives on the Committee	90%	78%	82%
I would like to know more about what TLAC does	71%	78%	70%
TLAC chooses to focus on the most important issues facing the industry	73%	57%	61%
TLAC should have more decision-making authority	51%	64%	52%
Committee members have enough experience in the taxi industry	46%	53%	55%
TLAC representatives are easily accessible outside of formal meeting times	61%	45%	39%
TLAC spends industry money wisely	41%	42%	27%

% is significantly higher than **%** in the same row

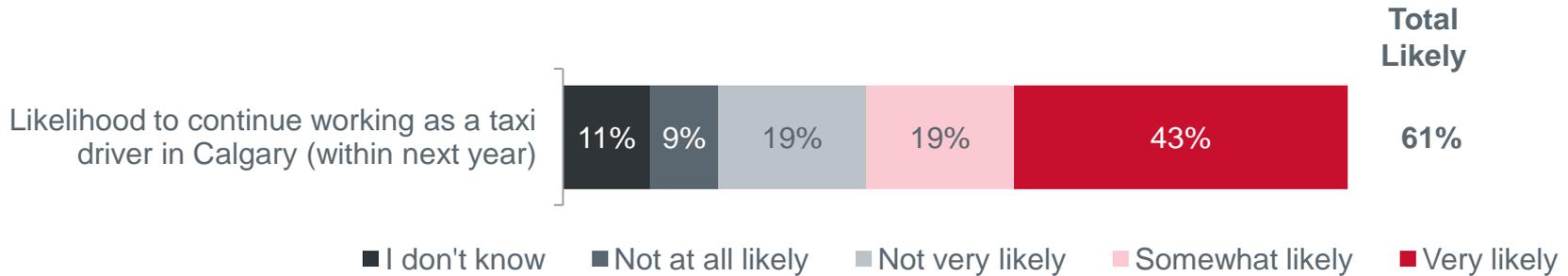
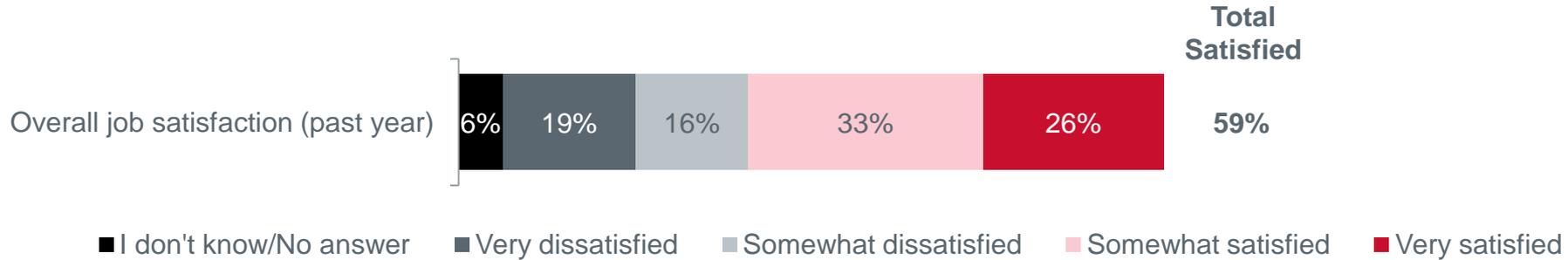
Base: All respondents somewhat/very/not very aware of TLAC's roles and responsibilities

Q.30 - Thinking of the Taxi and Limousine Advisory Committee, to what extent do you agree or disagree with each of the following statements about TLAC:

Drivers' Job Satisfaction



Drivers' (FT/PT) Overall Job Satisfaction And Likelihood Of Continuing To Work



Overall, three-in-five (59%) drivers (FT/PT) are satisfied with their job as a taxi driver in Calgary this past year. A nearly identical proportion (61%) indicate they are likely to continue working as a taxi driver in Calgary over the next year.

Base: Respondents who are currently working full-time/part-time (n=207)

Q31 Overall, how satisfied or dissatisfied would you say you are with your job as a taxi driver in Calgary this past year? / Q33 How likely will you be to remain working as a taxi driver in Calgary within the next year?



Sub-Segment Differences

Drivers' (FT/PT) Overall Job Satisfaction And Likelihood Of Continuing To Work

	Owner / Operator (n=49)	Lessee (n=108)	Vehicle owner/ Plate lessee (n=41)
Overall job satisfaction, past year (very, somewhat satisfied)	71%	51%	63%
Likelihood to continue working as a taxi driver, next year (very, somewhat likely)	73%	54%	66%

% is significantly higher than **%** in the same row

Base: Respondents who are currently working full-time/part-time

Q31 Overall, how satisfied or dissatisfied would you say you are with your job as a taxi driver in Calgary this past year? / Q33 How likely will you be to remain working as a taxi driver in Calgary within the next year?



Reasons For Overall Satisfaction Or Dissatisfaction With Their Job

Dissatisfied (somewhat and very)	n=72
Hard to make money / Little income	25%
Work is slow / Not a lot of business	22%
Expensive charges / Rent / Fees	14%
Work long hours	11%
Poor dispatch service	10%
Too many plates being issued / Too many cars	6%
Discouraged / Miserable	4%
Have to deal with a lot of drunk customers	3%
It's a monopoly	3%
We are not respected	3%
Issues with Uber	3%
No job security	3%
No safety for the driver	1%
No problems / Never had any issues	1%
Airport should be for all drivers	1%
Other	19%
I don't know	24%

Satisfied (somewhat and very)	n=122
I like / enjoy my job	17%
Work is slow / Not a lot of business	17%
I make good money	12%
No problems / Never had any issues	7%
Flexible hours	7%
Hard to make money / Little income	6%
Good customers (friendly, nice, etc...)	6%
Issues with Uber	6%
Too many plates being issued / Too many cars	4%
We are respected	2%
Work long hours	2%
We are not respected	2%
Good company	2%
Expensive charges / Rent / Fees	2%
No safety for the driver	2%
Have to deal with a lot of drunk customers	2%
Poor dispatch service	2%
Long delays / Wait time	2%
Airport should be for all drivers	1%
No job security	1%
Other	7%
I don't know	23%

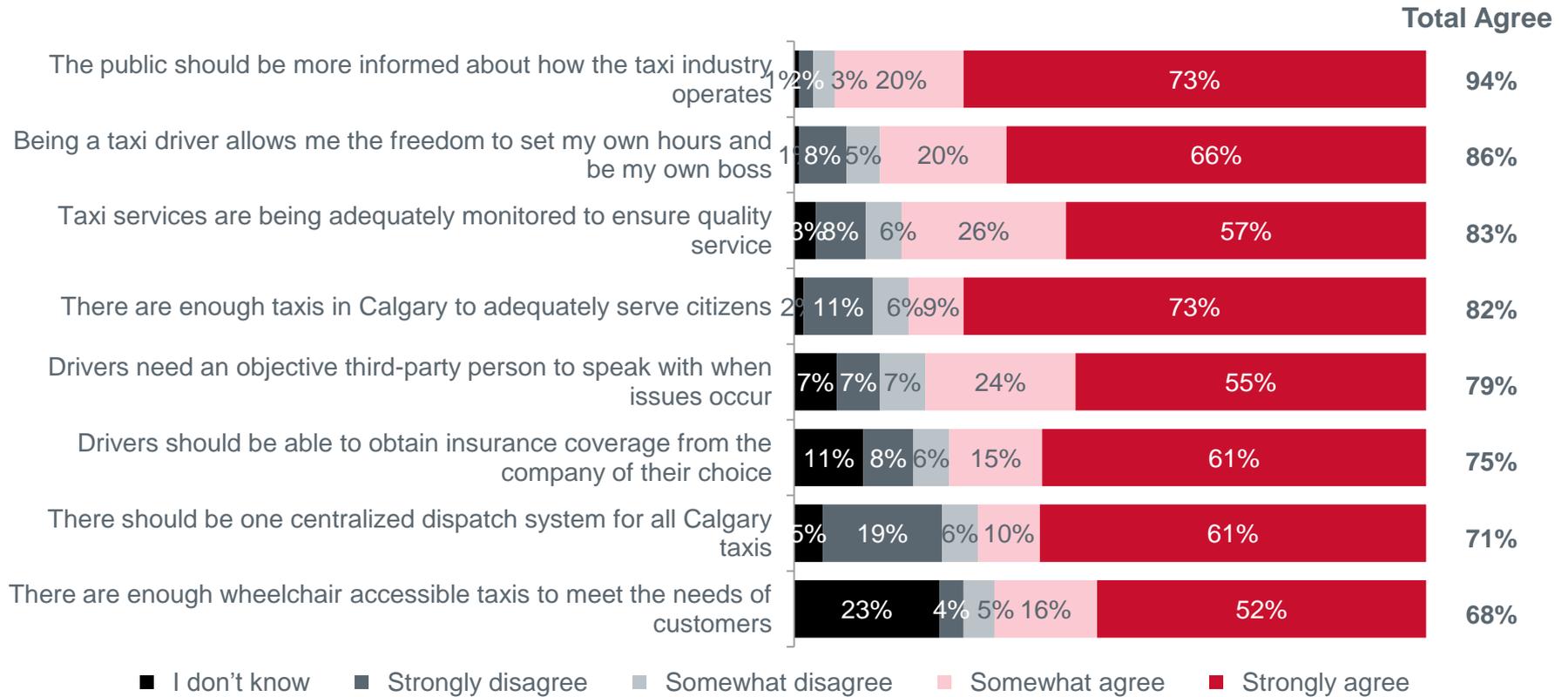
Among drivers (FT/PT) who are satisfied with their job as a taxi driver over the past year, the top reason for satisfaction is liking or enjoying their job (17%), however there is also a concern that the work is slow and there is not a lot of business (17%). Drivers (FT/PT) who are dissatisfied express mainly financial concerns, in that it is hard to make money / there is little income (25%), the work is slow / there is not a lot of business (22%), and the charges / rent / fees are expensive (14%).

Q.32 - Why do you say that you are [INSERT RESPONSE FROM Q31] with your job as a taxi driver this past year?

Drivers' Attitudes Towards The Industry / Suggested Improvements



Drivers' Attitudes Towards The Industry (1 of 2)



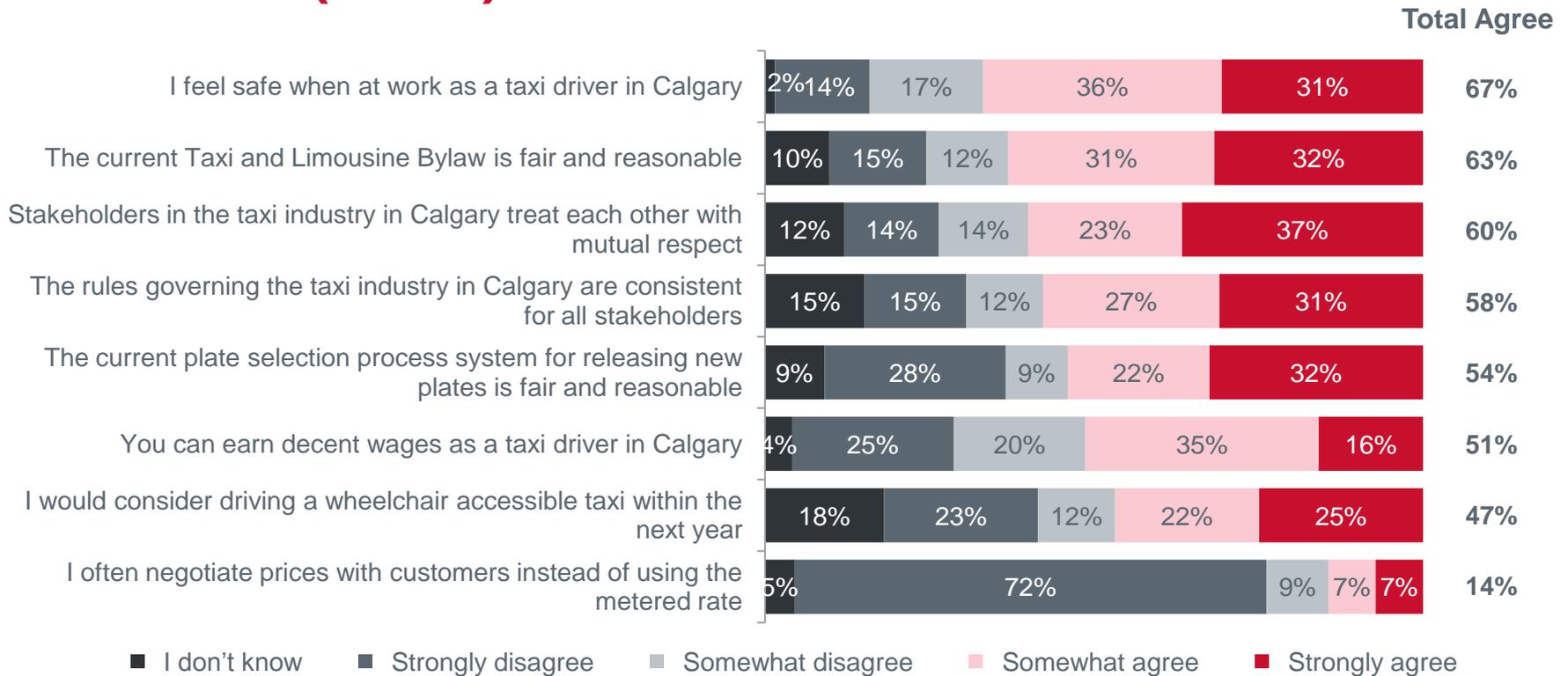
A high majority of drivers agree that the public should be more informed about how the taxi industry operates (94%), and that being a taxi driver allows them the freedom to set their own hours and be their own boss (86%).

Base: All respondents (n=265)

Q34 Thinking of the taxi industry in Calgary, please indicate the extent to which you agree or disagree with each of the following statements:



Drivers' Attitudes Towards The Industry (2 of 2)



Less than half (47%) of drivers agree that they would consider driving a wheelchair accessible taxi within the next year, and one-in-seven (14%) agree they often negotiate prices with customers instead of using the metered rate.

Base: All respondents (n=265)

Q34 Thinking of the taxi industry in Calgary, please indicate the extent to which you agree or disagree with each of the following statements:



Sub-Segment Differences

Drivers' Attitudes Towards The Industry (1 of 2)

Agree (strongly, somewhat)	Owner / Operator (n=49)	Lessee (n=108)	Vehicle owner/ Plate lessee (n=41)
The public should be more informed about how the taxi industry operates	92%	95%	93%
Being a taxi driver allows me the freedom to set my own hours and be my own boss	90%	85%	88%
Taxi services are being adequately monitored to ensure quality service	90%	80%	85%
There are enough taxis in Calgary to adequately serve citizens	92%	82%	90%
Drivers need an objective third-party person to speak with when issues occur	76%	81%	88%
Drivers should be able to obtain insurance coverage from the company of their choice	73%	81%	66%
There should be one centralized dispatch system for all Calgary taxis	73%	72%	66%
There are enough wheelchair accessible taxis to meet the needs of customers	82%	72%	71%

Base: All respondents

Q34 Thinking of the taxi industry in Calgary, please indicate the extent to which you agree or disagree with each of the following statements:



Sub-Segment Differences

Drivers' Attitudes Towards The Industry (2 of 2)

Agree (strongly, somewhat)	Owner / Operator (n=49)	Lessee (n=108)	Vehicle owner/ Plate lessee (n=41)
I feel safe when at work as a taxi driver in Calgary	76%	68%	80%
The current Taxi and Limousine Bylaw is fair and reasonable	76%	65%	68%
Stakeholders in the taxi industry in Calgary treat each other with mutual respect	67%	63%	51%
The rules governing the taxi industry in Calgary are consistent for all stakeholders	71%	56%	61%
The current plate selection process system for releasing new plates is fair and reasonable	57%	57%	46%
You can earn decent wages as a taxi driver in Calgary	61%	44%	46%
I would consider driving a wheelchair accessible taxi within the next year	45%	42%	39%
I often negotiate prices with customers instead of using the metered rate	27%	12%	17%

% is significantly higher than **%** in the same row

Base: All respondents

Q34 Thinking of the taxi industry in Calgary, please indicate the extent to which you agree or disagree with each of the following statements:



Suggested Improvements To Wheelchair Accessible Taxi Services

	n=265
More wheelchair accessible taxis / Vans	15%
More / Better training	6%
Subsidize the wheelchair taxis / Vans	3%
Enforce drivers with accessible taxis to pick up customers	2%
Better dispatch service	2%
Fare should be more expensive	2%
Have a separate company for wheelchair accessible taxis	2%
Centralize dispatch	1%
Vehicles should be inspected more often	1%
City of Calgary should take care of it	1%
Improve safety	1%
Wheelchair accessible taxis should not take other clients	1%
Lower fees / rent / charges	1%
Have a separate dispatch	1%
Increase customers	1%
Other	9%
None	4%
I don't know	58%

Three-in-five (58%) drivers are unsure of what needs to be done to improve wheelchair accessible taxi services in Calgary. Top suggestions include having more wheelchair accessible taxis and/or vans (15%), and providing more / better training (6%).

Base: All respondents
 Q35 What, if anything, need to be done to improve wheelchair accessible taxi services in Calgary?



Suggested Improvements To Taxi Industry

	n=265
Centralize the dispatch system	11%
Improve / better dispatch system	7%
Lower the charges / rent / fees	7%
Fair treatment for all taxi drivers	6%
Open plate system / More taxi licenses	5%
Allow drivers to have an input / decision making power	5%
Get rid of brokers / Remove brokerage system	4%
Do not issue more license plates / No need for more licenses	4%
Add more taxis	4%
Keep taxi industry regulated / Limit amount of competition	3%
More / better training / education	3%
Safety (unspecified)	3%
Better / more driver insurance	3%
Drivers should be the owner of the plate	3%
There are too many taxis	3%
Other	9%
None	3%
I don't know	26%

One-quarter (26%) of drivers indicate they don't know what needs to be done to improve the taxi industry in Calgary. The most frequent top mentions include centralizing the dispatch system (11%), improving the dispatch system (7%) and lowering the charges / rent /fees (7%).

Base: All respondents

Note: Mentions less than 3% are not listed

Q36 What, if anything, needs to be done to improve the taxi industry in Calgary?



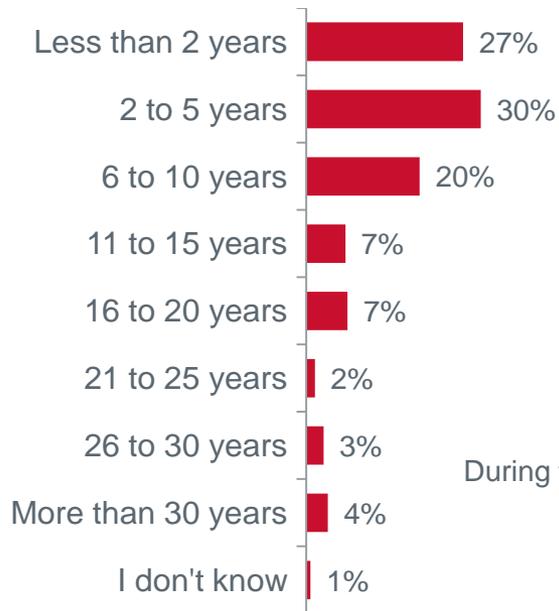
Drivers' Profile





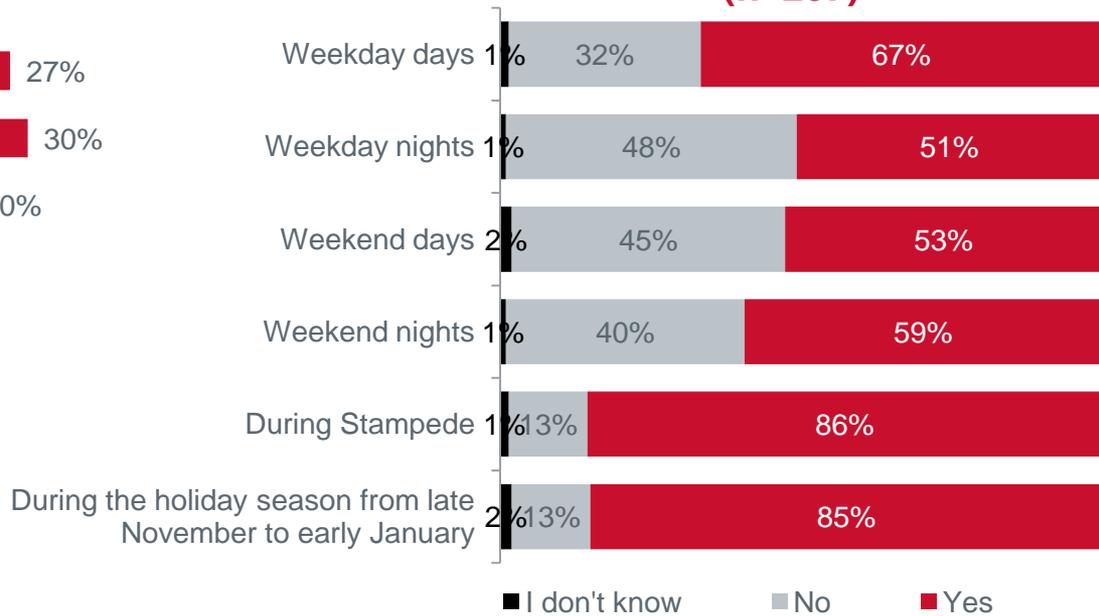
Tenure And Typical Time Of Operation

Taxi Driver Tenure In Calgary (n=265)



Base: All respondents

Time Of Operation (n=207)



Base: Respondents who are currently working full or part-time

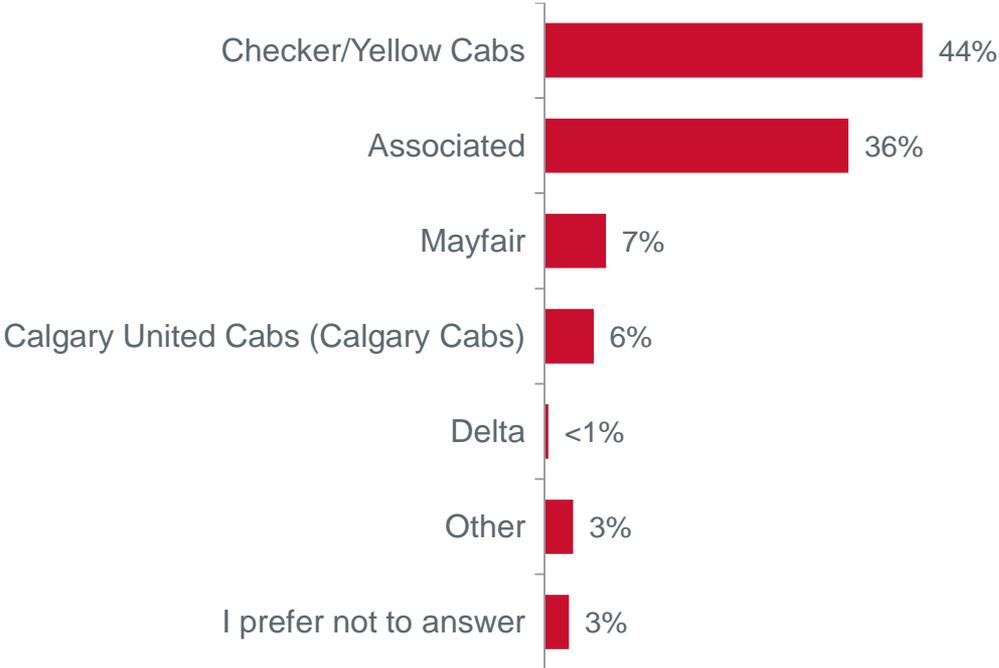
The greatest proportion of drivers have worked as a taxi driver in Calgary for 5 years or less (27% less than 2 years, 30% 2-5 years).

A high majority of drivers (FT/PT) typically work during Stampede (86%) and / or the holiday season from late November to early January (85%). Following this, the greatest proportion work weekday days (67%) and / or weekend nights (59%).

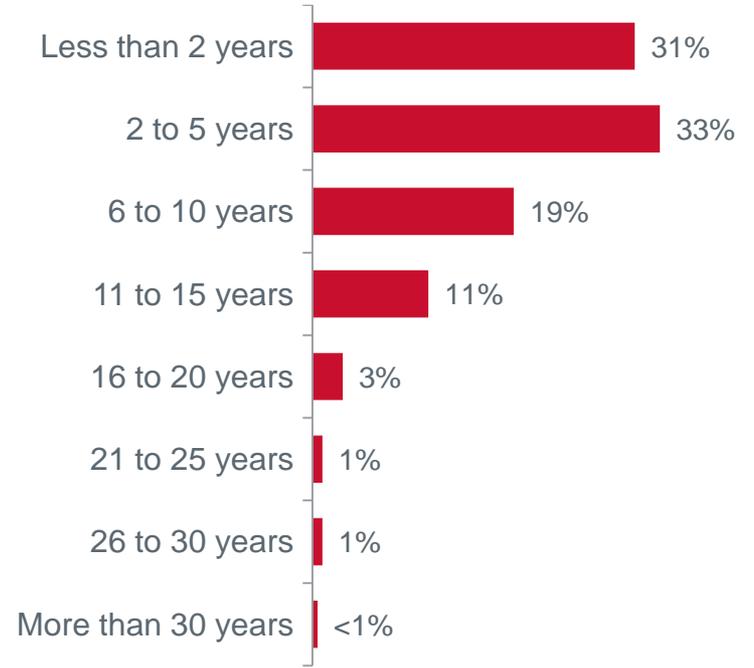
Q14 For how many years have you worked as a taxi driver in Calgary? / Q15 Do you typically drive taxis:



Currently Working For...



Tenure With Current Broker



The greatest proportion of drivers (FT/PT) are currently working for Checker / Yellow Cabs or Associated.

The majority of drivers (FT/PT) have been working for their current broker for 5 years or less (31% less than 2 years, 33% 2 to 5 years).

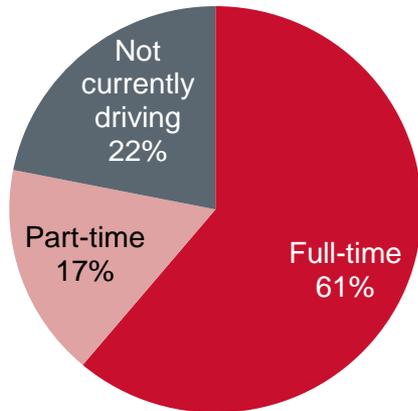
Base: Respondents who are currently working full-time/part-time (n=207)

Q16 Which taxi broker are you currently working with? / Q17 For how many years have you been working with your current taxi broker?



Employment Status And Hours Worked

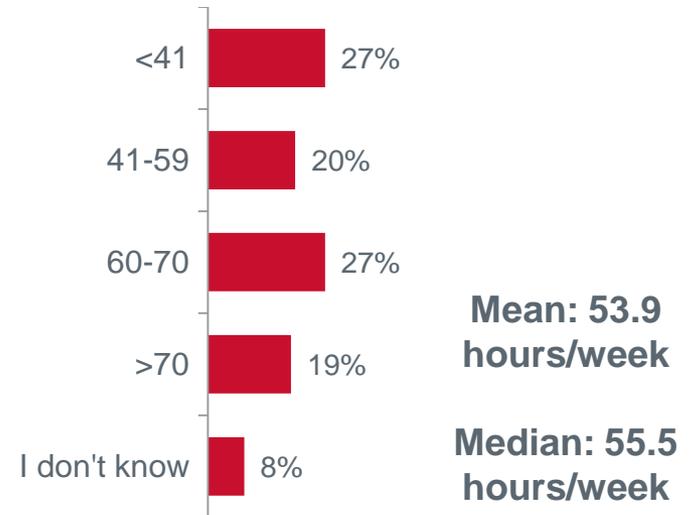
**Employment Status
(n=265)**



Base: All respondents



**Approximate Hours Worked
Per Week
(n=207)**



Base: Respondents who are currently working full or part-time

Three-in-ten (61%) drivers are currently working full time, while 17% are working part time and 22% are not currently driving.

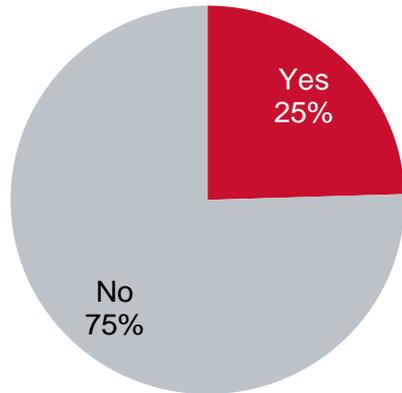
Among those working full or part time, drivers are driving an average of 54 hours per week.

Q3 Are you currently working: / Q4 Approximately how many hours per week do you currently work driving your vehicle?



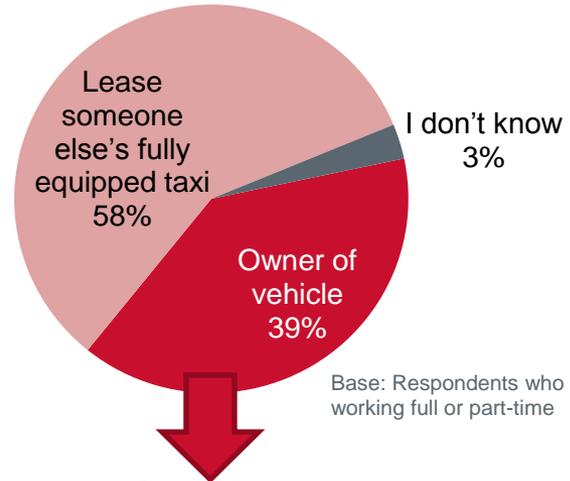
Ownership Of Plate/Vehicle

Currently Own A Taxi License Plate (n=265)



Base: All respondents

Owner Or Lease Of the Vehicle (n=207)



Base: Respondents who are currently working full or part-time

Currently Use Someone Else's Taxi License Plate (n=81)



Base: Respondents who are currently working full or part-time and own their vehicle

One-quarter (25%) of drivers currently own a taxi plate.

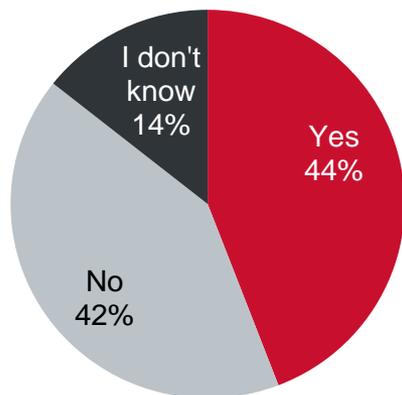
Among drivers (FT/PT), the majority (58%) lease someone else's fully equipped taxi.

Among drivers (FT/PT) who own their vehicle, half (51%) currently use someone else's taxi license plate, and half (49%) do not.

Q5 Do you currently have a taxi plate license in your name or in the name of a company you control? / Q6 Are you the owner of the vehicle you regularly drive or do you lease someone else's fully equipped taxi? / Q7 Do you currently use someone else's taxi plate license on your own vehicle?

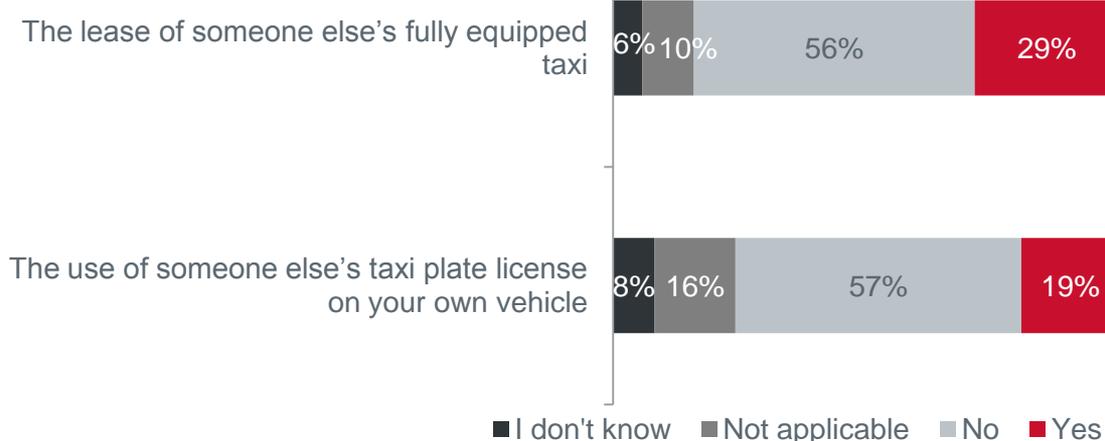


Awareness Of Fees Collected For Use Of License Plate Require Written Agreement (n=265)



Base: All respondents

Currently Have A Written Agreement In Place For... (n=207)



Base: Respondents who are currently working full or part-time

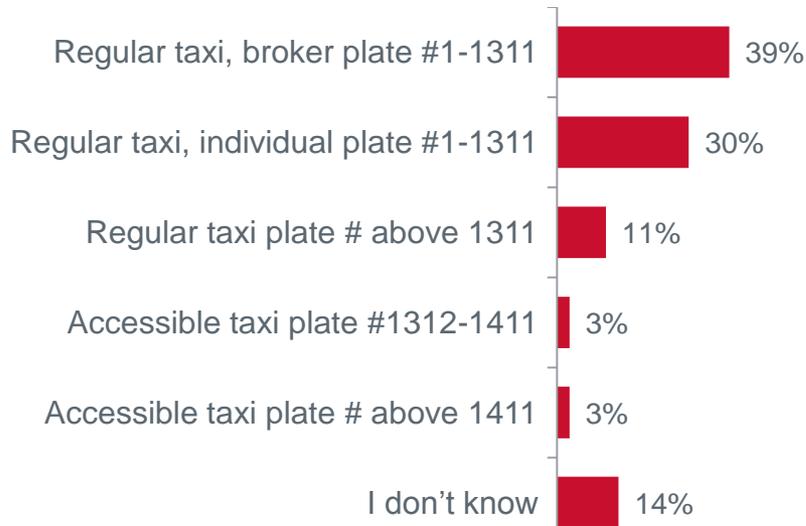
Less than half (44%) of drivers are aware that if a person holding a taxi or accessible taxi plate license collects fees for the use of the plate, the current bylaw requires written documentation, indicating an opportunity for further education.

Among drivers (FT/PT), three-in-ten (29%) currently have a written agreement in place for the lease of someone else's fully equipped taxi, and one-in-five (19%) have a written agreement for the use of someone else's taxi plate license on their vehicle.

Q8 If a person holding a taxi or accessible taxi plate license collects fees for the use of the plate, the current bylaw requires that the fees need to be documented in a written agreement with all parties involved. Before today, were you aware that a written agreement is required in these circumstances? / Q.9 - Do you currently have a written agreement in place for:

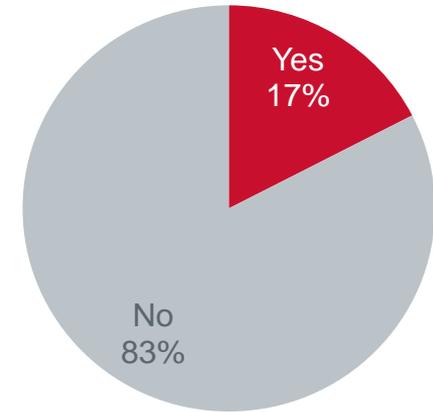


Class Of Plate Attached To The Taxi... (n=207)



Base: Respondents who are currently working full or part-time

Have Driven An Accessible Taxi Within Past 5 Years (n=195)



Base: Respondents who have a regular taxi plate or don't know what kind of plate they have

The greatest proportion of drivers (FT/PT) drive a regular taxi with broker plate # 1-1311 (39%), followed by those driving a regular taxi with an individual plate #1-1311 (30%).

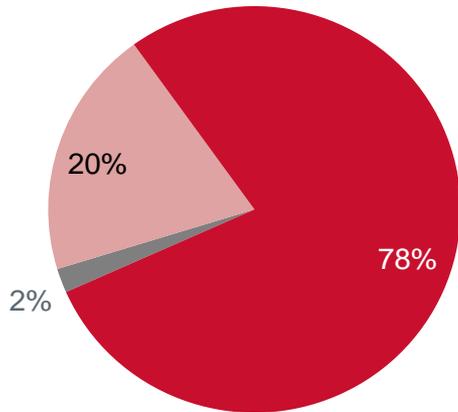
One-sixth (17%) of drivers (FT/PT) who have a regular taxi plate or are unsure of their plate type have driven an accessible taxi within the past 5 years.

Q10 What class of plate is attached to the taxi you most regularly drive? / Q11 Within the past 5 years, have you driven an accessible taxi?



Vehicle Shift And Driver Type

**Vehicle Shift
(n=207)**

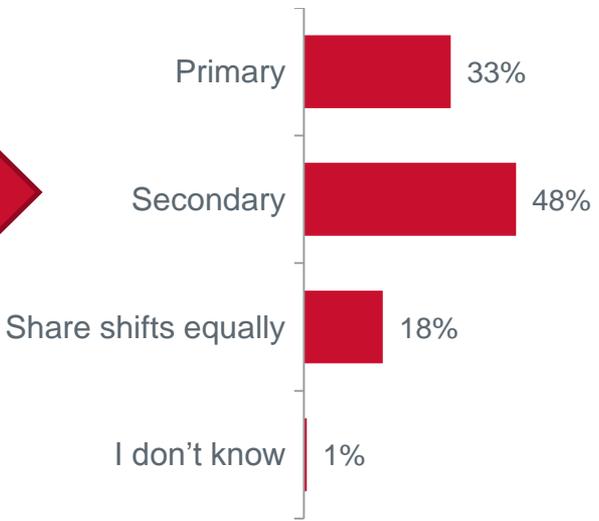


■ I don't know ■ Single-shifted ■ More than one driver

Base: Respondents who are currently working full or part-time



**Primary Or Secondary Driver
(n=162)**



Base: Respondents who indicate more than one driver drives their taxi

Nearly four-in-five (78%) drivers (FT/PT) indicate that more than one driver drives the taxi they regularly drive.

Among drivers (FT/PT) who indicate more than one driver drives their taxi, nearly half (48%) indicate they are the secondary driver.

Q12 Is the taxi you regularly drive single-shifted with just you driving the taxi, or is there more than one driver? / Q13 Are you the primary driver or a secondary driver of the taxi?



Profile of Respondents





All Respondents	n=265
Gender	
Male	98%
Female	2%
Age	
25-34	20%
35-44	40%
45-54	24%
55-64	14%
65 and older	1%
I prefer not to answer	1%

All Respondents	n=265
Ethnicity	
East Indian	30%
West Indian/African	19%
Canadian/North American	18%
Asian	17%
Middle Eastern	5%
Western European	2%
Eastern European	1%
I prefer not to answer	8%