



Calgary



TLAC – Satisfaction with Taxi Services

Report of Telephone Survey 2016



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Context:

- The Taxi and Limousine Advisory Committee (TLAC) has been mandated to conduct citizen satisfaction research regarding taxi and limousine services in Calgary.
- The initial benchmark survey was conducted in 2014 following exploratory qualitative research which informed the design of the survey.
- TLAC aims to track citizen usage and satisfaction with taxi services in Calgary and embarked on the first tracking wave in June 2015 and another (conducted by Administration) in 2016.
- Since 2014, many changes and pressures in the marketplace, including the growth of car sharing services, introduction (and removal) of ride sharing companies, economic pressures and changes in the taxi regulations could have significant influence on citizen perceptions.

This report represents the findings from the 2016 telephone survey with 600 Calgarians and includes comparisons to the data collected in 2015 and 2014.

Objectives:

- The core objectives of the telephone survey are to:
 - Identify taxi service usage among Calgarians
 - Identify and assess the methods to obtain taxi services
 - Assess satisfaction with dispatch and drivers
 - Evaluate the experiences during the ride
 - Measure overall satisfaction
 - Evaluate payment options
 - Assess awareness of the bumper sticker and complaints
 - Measure awareness of passenger and driver rights
 - Evaluate attitudes towards taxi services in Calgary



Sample Size	2016: n=600 (including 365 taxi users) 2015: n=600 (including 400 taxi users) 2014: n=500 (including 303 taxi users)
Target Audience	Random representative sample of Calgarians aged 18+
Survey Method	Random digit dialing using both landline and cell phone telephone exchanges via a Computer Assisted Telephone Interviewing System
Interview Duration/Dates	16 minutes: May 25 to June 7, 2016 18 minutes: June 8 to June 21, 2015 13 minutes: April 24 to May 11, 2014
Margin of Error	+/- 4.0%, 19 times out of 20 (+/- 5.1% among taxi users)
Data Analysis	Data were weighted to be representative of Calgarians 18+ by age and gender

SUMMARY OF RESULTS

Summary of Survey Results

Taxi Usage

- Within the past year, Calgarians have used the following services:
 - Taxis – 62%
 - Accessible taxis – 7%
 - Total taxis & accessible taxis – 63%
 - Sedans – 11%
 - Limousines – 9%
 - Ridesharing – 6%
- Though overall taxi usage (including accessible taxis) has declined slightly since 2015, the average number of trips among those who used a taxi in 2015, however, has gone up from 14 trips in 2015 to 18 trips in 2016.
- The main reasons that some Calgarians have not used taxi services are similar to last year - having their own vehicles (66%), and not having a need for taxi services (20%).
- Checker Yellow Cabs and Associated Cabs together hold a sizeable majority (76%) of the market share.
- Among taxi users, 69% have used taxi services during weekdays, and 65% have used taxi services on weekends (trending upwards since 2014).
- Weekday taxi usage is fairly constant at all times of day, albeit slightly higher during the early morning rush hour and late evening (consistent with 2015 results).
- Weekend usage peaks during the late evening, also consistent with previous years' findings.
- More than one-half (56%) of Calgarians are likely to use taxi services within the next 12 months, showing a downward trend from the 62% who have used taxi services this past year.
- The purpose of taxi usage remains similar to last year, with the main reasons for using taxis being: to attend social functions (59%); and, to get to and from the airport (54%).

Obtaining Taxi Services

- Taxi users most commonly phone dispatchers to obtain a taxi, either by phoning for immediate service (68%, directional increase since 2014), or via pre-booking a taxi (51%, directional decrease since 2014).
- The majority of taxi users are satisfied with all methods of obtaining a taxi. Satisfaction remain largely consistent with previous years with only some directional changes.
- There has been, however, a significant increase (53% vs. 40% in 2015) in the likelihood to use online booking system among potential taxi users over the next 12 months.

Summary of Survey Results

Overall Satisfaction

- Satisfaction with all types of for-hire transportation services is high (a range of 85% - 93%) and consistent with previous years, except limousine services which has been forming a downward trend since 2014.
- The key factors influencing overall satisfaction include (in ranked order):
 - Taxi drivers (ease of communication, driving safely, driver's knowledge, courteousness, helpfulness, professional appearance, taking the most economical route)
 - Dispatchers (ability to speak with them in a timely manner, dispatchers explaining the expected wait time for the taxi to arrive)
 - Value for money, and experiences during the ride, (especially with condition/maintenance, time it took to arrive, music/radio)

Drivers & Experiences During the Ride

- A high majority (90%) of taxi users are satisfied with taxi drivers, slight decline from the previous years.
- Satisfaction levels with drivers and experiences during the ride remain consistent with previous years with only a few directional changes.
- Of concern, the majority (60%) of taxi users continue to experience drivers using cell phones.

Dispatchers

- Four-in-five or more Calgarians who used dispatcher services in the past year are satisfied with the various attributes of the dispatcher service. Satisfaction has been forming an upward trend since 2014.

Payment and Value

- Some (21%, identical to 2015) taxi users report that they have experienced issues with the debit/credit machine and/or with the driver not having correct change for their payment (16%, slight increase from 10% in 2015).
- Overall, 63% of taxi users are satisfied with the value for money they received from their taxi rides this past year, a slight decrease from 2015. Some price-sensitivity is evident, as taxi users are highly satisfied (85%) with the overall taxi services they received, but less satisfied with the value for money they received (63%).

Bumper Sticker Awareness

- Following the mandatory implementation of displaying bumper stickers regarding compliments and concerns about taxi services, 36% of the general public recall having seen the bumper stickers (significant increase from 27% in 2015), which is similar to the level of recall among taxi users (39%).

Summary of Survey Results

- Nearly two-in-five (17%) of those who recall the bumper sticker correctly indicates that it informed people to contact The City of Calgary via 311 – a significant decrease from 34% in 2015. 21% incorrectly report that the bumper sticker informed people to call the taxi company.

Complaints

- 7% of Calgarians indicates that they have made a complaint about taxi services this past year, a significant increase from 3% in 2015.
- However, not all taxi customers experiencing issues are making complaints, as some citizens who did not complain report that they didn't think it would make a difference (9%) or that it takes too much time to do so (3%).
- Among the few taxi users who did make a complaint about taxi services in Calgary within the past year, 67% indicate that they made the complaint to the taxi company directly, trending downwards since 2014 and 8% complained via 311 at The City of Calgary, directional decrease since 2015.
- Satisfaction with complaint-resolution is at 20%, a return to 2014 levels.
- The reader should note that the results regarding complaints are based on very small sample sizes.

Awareness of Rights

- General awareness of passenger rights is strong for many areas (ranging from 50% to 94%). There is relatively low awareness of the new maximum fare rules The City has introduced in 2016.
- Awareness with all parameters is consistent with previous years with one exception - there has been a significant increase in awareness of Calgarians that drivers can ask for a deposit of up to \$30 for trips (19% vs. 13% in 2015).

Attitudes Towards Taxi Services

- Half or more (a range of 48% - 99%) agree with various statements regarding taxi services in Calgary.
- About one-in-five (21%) past taxi users confess that they order more than one taxi during busy times.
- Attitudes towards taxi services in Calgary remain consistent with previous years with some directional increases in agreement ratings for the following:
 - Taxi drivers should be allowed to charge customers a fee for any damage customers do to the taxi
 - I am aware of how taxi services are regulated in Calgary
 - There are enough taxis in Calgary to adequately serve citizens
 - I would like more information about how taxi services operate in Calgary



Strategic Observations

Volume is down but frequency is up

Fewer Calgarians report taking taxis in the past year, however, those who are taking taxis appear to be using them more often. As well, we note a significant increase in Code 8 calls – all of which could suggest that the taxi user base that is left is a more “committed” user and the more casual users are abandoning taxis for other modes or due to lack of need (e.g. unemployment).

The frequency of taxi usage is not likely to increase next year

Though taxi usage has declined in the last year and the frequency among taxi users has increased there are predictions that the number of users will continue to decline next year as the economic downturn and new options take their toll on the taxi industry. Hence, satisfaction with key drivers are essential to retain the existing market.

Satisfaction is strong, but value for money is down

While most riders are happy with the quality of the service they are getting, there is a declining sense of value for money from the user base. The economic downturn is pressing on everyone’s expenditures and the impact (if any) of lower fares is not yet being felt by the riding public.

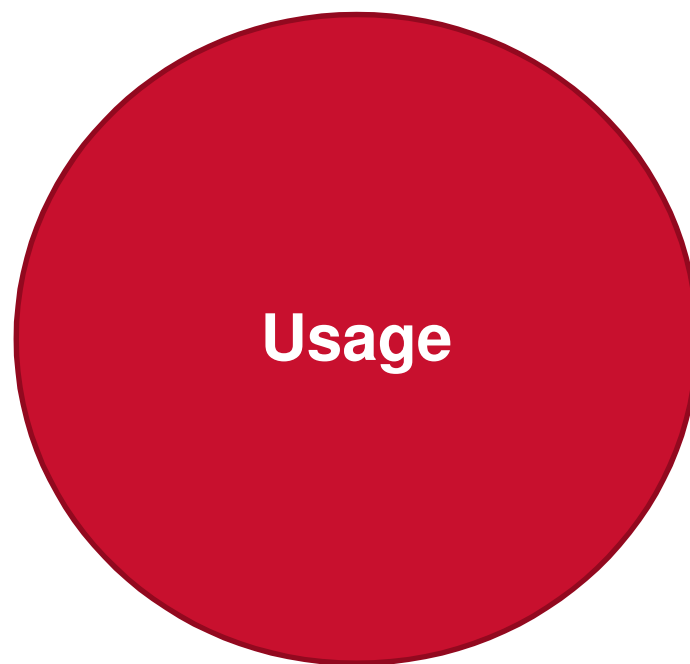
The little irritants persist

Taxi users continue to report broken debit machines, insufficient change and, most commonly, drivers using cell phones. In a marketplace where competitive options are increasing, these irritants may begin to take their toll on satisfaction and usage.

Dispatch and online booking facilities remain important

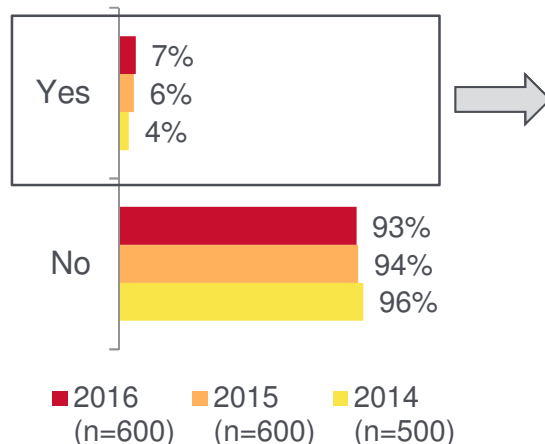
Dispatch remains a key driver of satisfaction this year as well; satisfaction with dispatch have been improving directionally. With higher incidence of online bookings among potential taxi users next year and declining satisfaction level with using Apps among current users, the improvement of these booking facilities remain important.

DETAILED ANALYSIS



Accessible Taxi Usage & Frequency

Accessible Taxi Usage - Past Year -

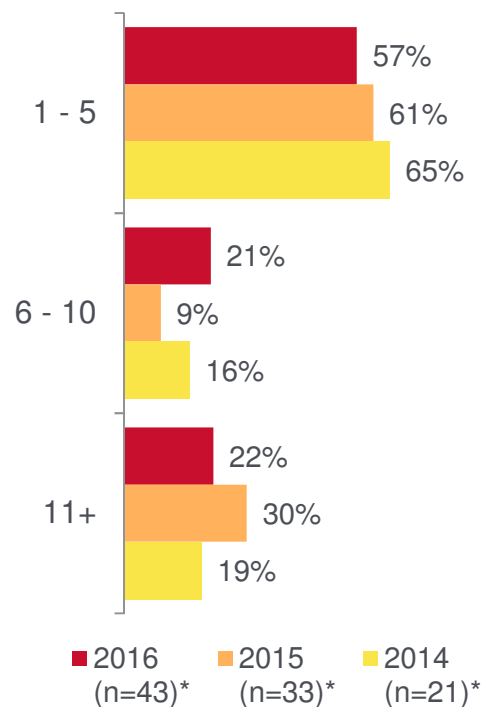


Mean (excluding 0)
10 times
(18 times in 2015, 15 times in 2014)

Median (excluding 0)
3 times
(4 times in 2015, 4 times in 2014)

Base: All Calgarians

Frequency Among Users



***Small sample, interpret with caution**

Base: Calgarians who have used accessible taxis in the past year

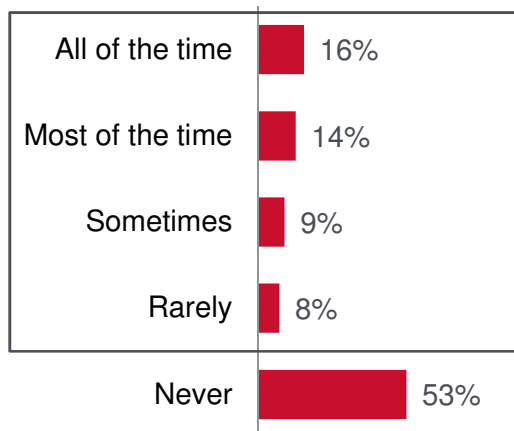
- A total of 7% of Calgarians indicate that they have used accessible taxi services within the past year, a directional increase since 2014.
- Those using accessible taxi services have taken an average of 10 rides this past year, slightly lower than the average of 18 rides in 2015 (**caution: small sample**).
- Accessible taxi usage (within the past year) is higher among Calgarians 55+ years old.

Before we begin, when I use the term 'taxi' services, please refer only to taxis and not to sedans or limousine services.

Q3. Within the **past year**, approximately how many times have you used each of the following types of services in Calgary? Accessible taxi services
Change in wording in 2016 from "Accessible taxi services for the accommodation of a mobility device" to "Accessible taxi services"

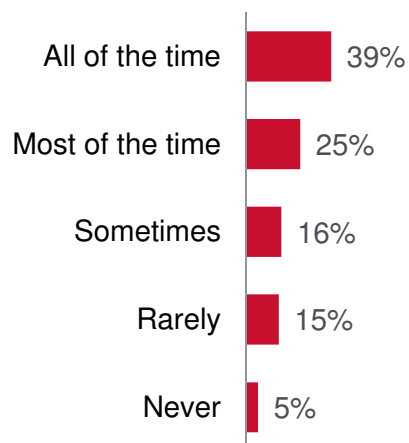
Accommodation of a Mobility Device

Accessible Taxi Usage for Accommodation of Mobility Device



■ 2016
(n=43)*

Requested Accommodation of Mobility Device



■ 2016
(n=22)*

**Small sample, interpret with caution*

Base: Calgarians who have used accessible taxi services in the past year

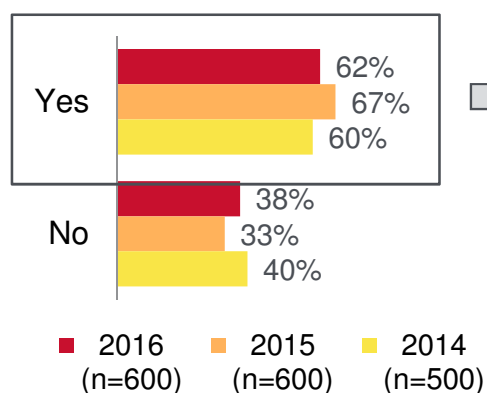
Base: Calgarians who have used accessible taxi services for the accommodation of a mobility device in the past year

- In 2016, 7% of Calgarians used accessible taxi services. Of these, 47% used them for accommodation of a mobility device (**caution – small sample**).
- Almost all (95%) used an accessible taxi in the past year specifically for the accommodation of a mobility device (**caution – small sample**).

Q3a. Of the times you used accessible taxi –how many times did you use it for accommodation of a mobility device? Q3b. Of the times you used accessible taxi for accommodation of a mobility device - how many times did you request for it while ordering an accessible taxi?
New questions in 2016

Taxi Usage & Frequency

Taxi Usage - Past Year -

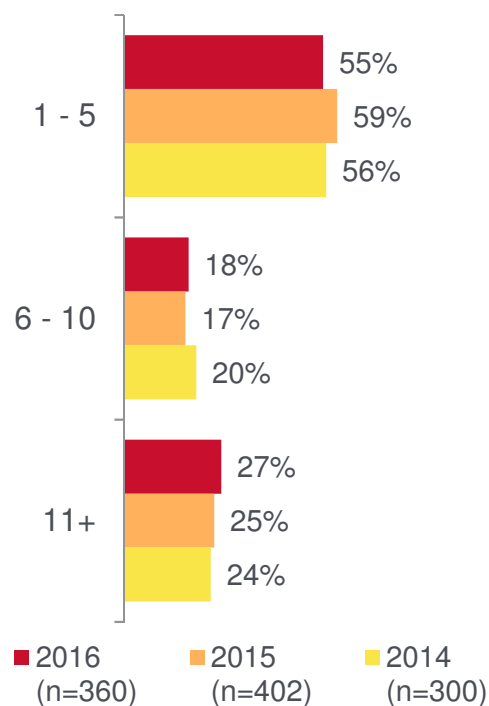


Mean (excluding 0)
17 times
(13 times in 2015, 15 times in 2014)

Median (excluding 0)
5 times
(4 times in 2015, 4 times in 2014)

Base: All Calgarians

Frequency Among Users



Base: Calgarians who have used taxis in the past year

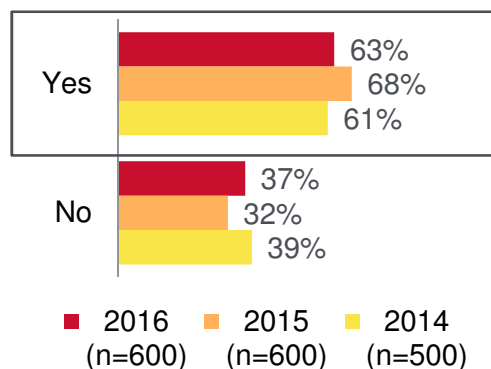
- More than three-in-five (62%) Calgarians have used taxi services at least once in the past year, a slight decline since last year (67%). The usage has returned to 2014 levels (60%).
- However, those who used a taxi took an average of 17 taxi rides in the past year, slightly more than in 2015 (13 times).
- Taxi usage (within the past year) is higher among young Calgarians (18-34 years old) and those with an annual household income of more than \$100,000.

Before we begin, when I use the term 'taxi' services, please refer only to taxis and not to sedans or limousine services.

Q3. Within the **past year**, approximately how many times have you used each of the following types of services in Calgary? Taxi services

Total Taxi and Accessible Taxi Usage & Frequency

Taxi/Accessible Taxi Usage - Past Year -

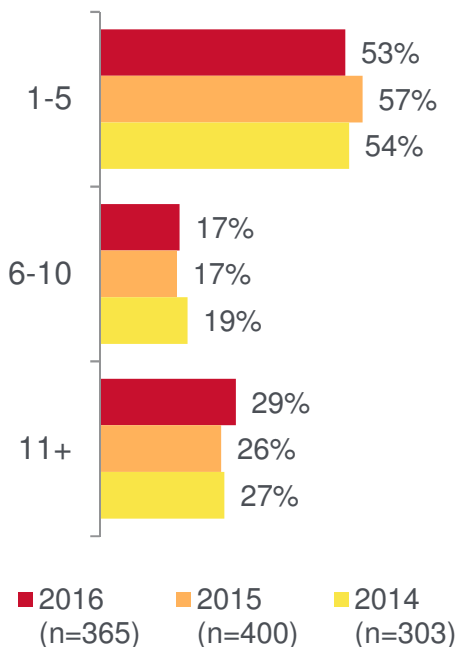


Mean (excluding 0)
18 times
(14 times in 2015, 16 times in 2014)

Median (excluding 0)
5 times
(4 times in 2015, 5 times in 2014)

Base: All Calgarians

Frequency Among Users



Base: Calgarians who have used taxis or accessible taxis in the past year

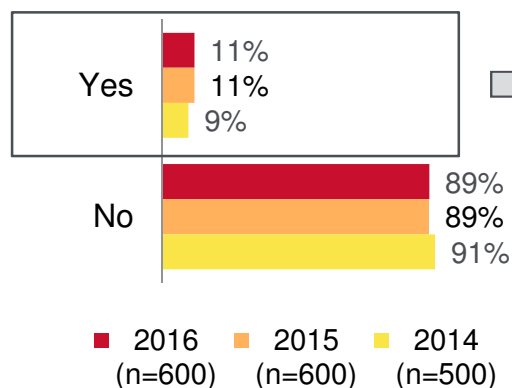
- The majority (63%) of Calgarians have used either taxi or accessible taxi services at least once in the past year, a slight decline from last year (68%). The usage has returned to 2014 levels (61%).
- However, those who have used taxi or accessible taxi services indicate having used these services an average of 18 times in the past year, showing a slight increase in the frequency of usage since 2015 (14 trips on average).
- Total taxi or accessible taxi usage (within the past year) is higher among Calgarians aged 18-34

Before we begin, when I use the term 'taxi' services, please refer only to taxis and not to sedans or limousine services.

Q3. Within the past year, approximately how many times have you used each of the following types of services in Calgary? Taxi services / Accessible taxi services

Sedan Usage & Frequency

Sedan Usage - Past Year -

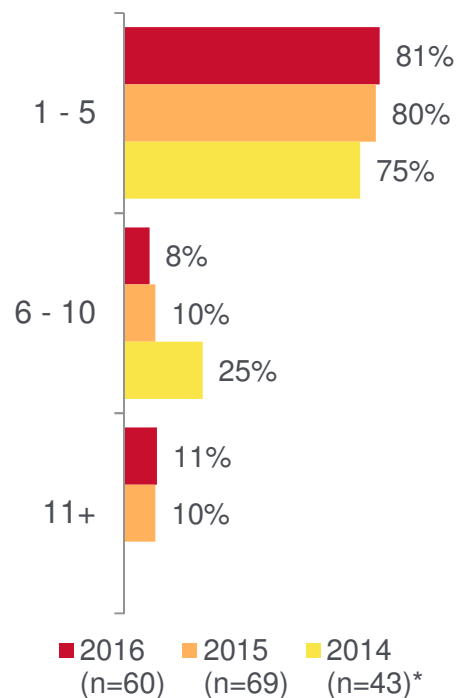


Mean (excluding 0)
4 times
(4 times in 2015, 3 times in 2014)

Median (excluding 0)
2 times
(2 times in 2015, 2 times in 2014)

Base: All Calgarians

Frequency Among Users



**Small sample, interpret with caution*

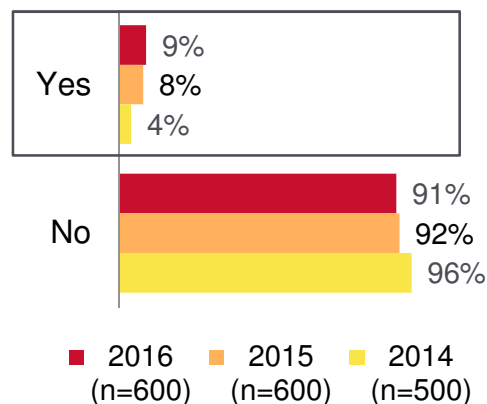
Base: Calgarians who have used sedans in the past year

- Overall, 11% of Calgarians report having used a sedan in 2016, identical to 2015.
- Calgarians who have used sedan services indicate having used these services an average of 4 times in the past year, similar to the frequency noted in previous years.
- Sedan usage (within the past year) is higher among:
 - Calgarians aged 35-54
 - Calgarians with an annual household income of more than \$100,000.

Q3. Within the **past year**, approximately how many times have you used each of the following types of services in Calgary? Sedan services

Limousine Services Usage & Frequency

Limousine Usage - Past Year -

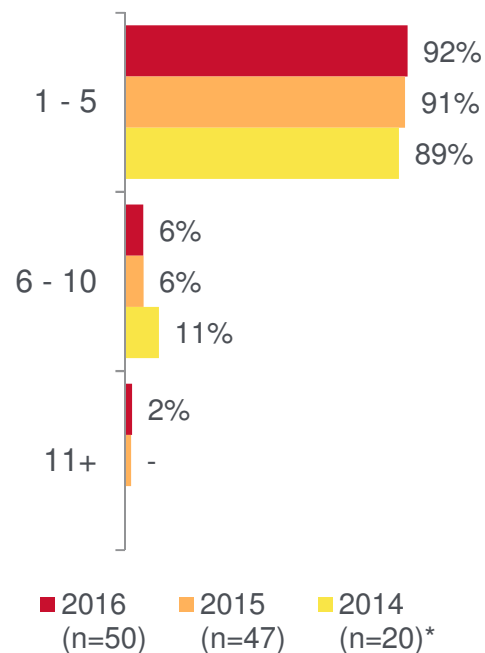


Mean (excluding 0)
2 times
(2 times in 2015, 2 times in 2014)

Median (excluding 0)
2 times
(1 time in 2015, 2 times in 2014)

Base: All Calgarians

Frequency Among Users



**Small sample, interpret with caution*

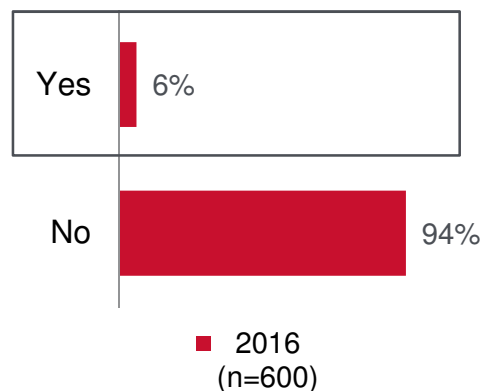
Base: Calgarians who have used limousines in the past year

- In 2016, 9% of Calgarians indicate that they have used limousine services, a directional increase since 2014.
- On average, limousine users have taken 2 limo rides this past year, identical to the frequency noted in previous years.
- Limousine usage (within the past year) is higher among citizens living in Southwest Calgary.

Q3. Within the **past year**, approximately how many times have you used each of the following types of services in Calgary? Limousine services

Ridesharing Services Usage & Frequency

Ridesharing Usage - Past Year -

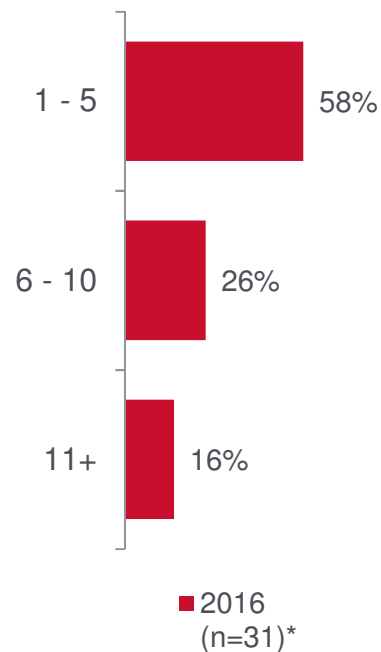


Mean (excluding 0)
10 times

Median (excluding 0)
4 times

Base: All Calgarians

Frequency Among Users



**Small sample, interpret with caution*

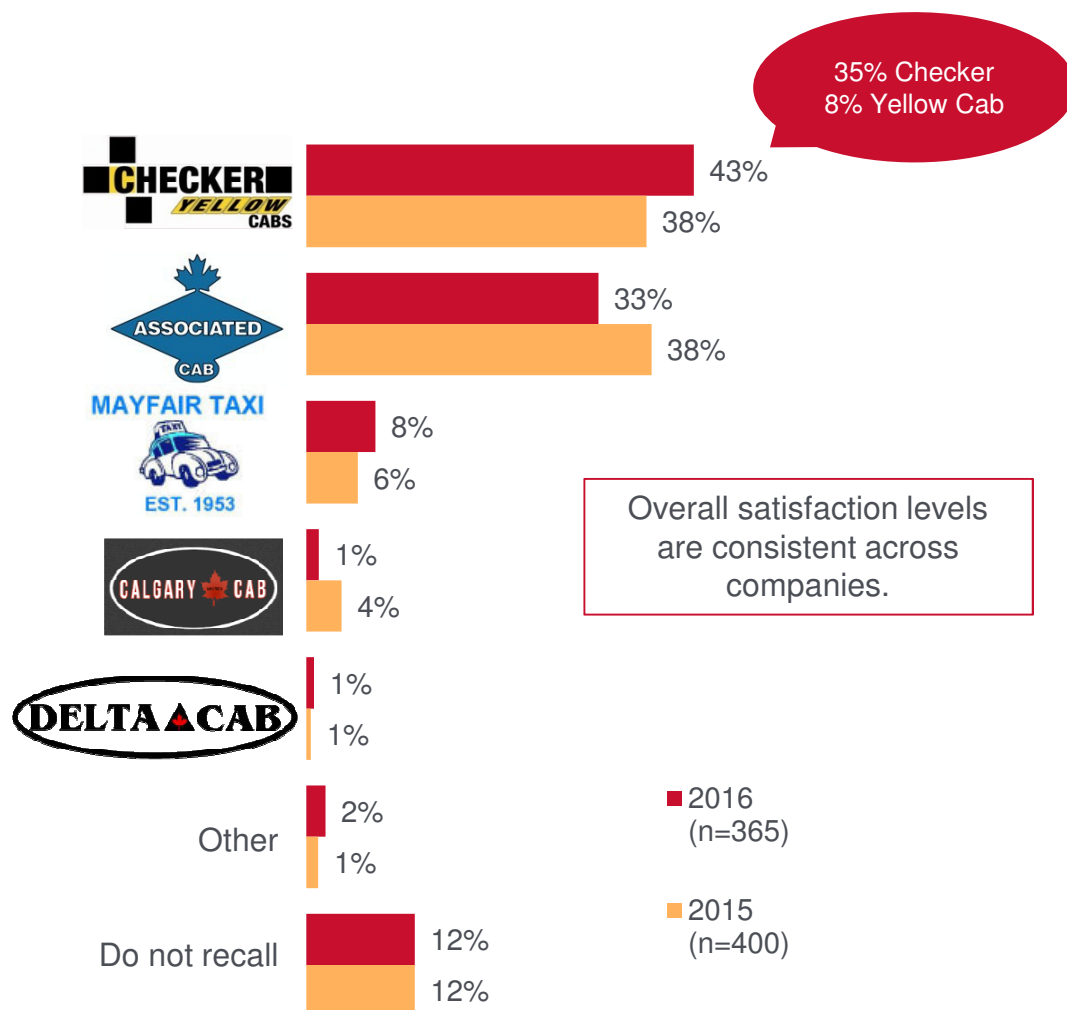
Base: Calgarians who have used ridesharing
services in the past year

- In 2016, 6% of Calgarians indicate that they have used ridesharing services in the past year.
- On average, rideshare users have taken 10 rides this past year (**caution – small sample**).
- Ridesharing services usage (within the past year) is higher among younger Calgarians (18-34 years of age).

Q3. Within the **past year**, approximately how many times have you used each of the following types of services in Calgary? Ridesharing services
New question in 2016

**Small sample, interpret with caution*

Taxi Company Most Often Used



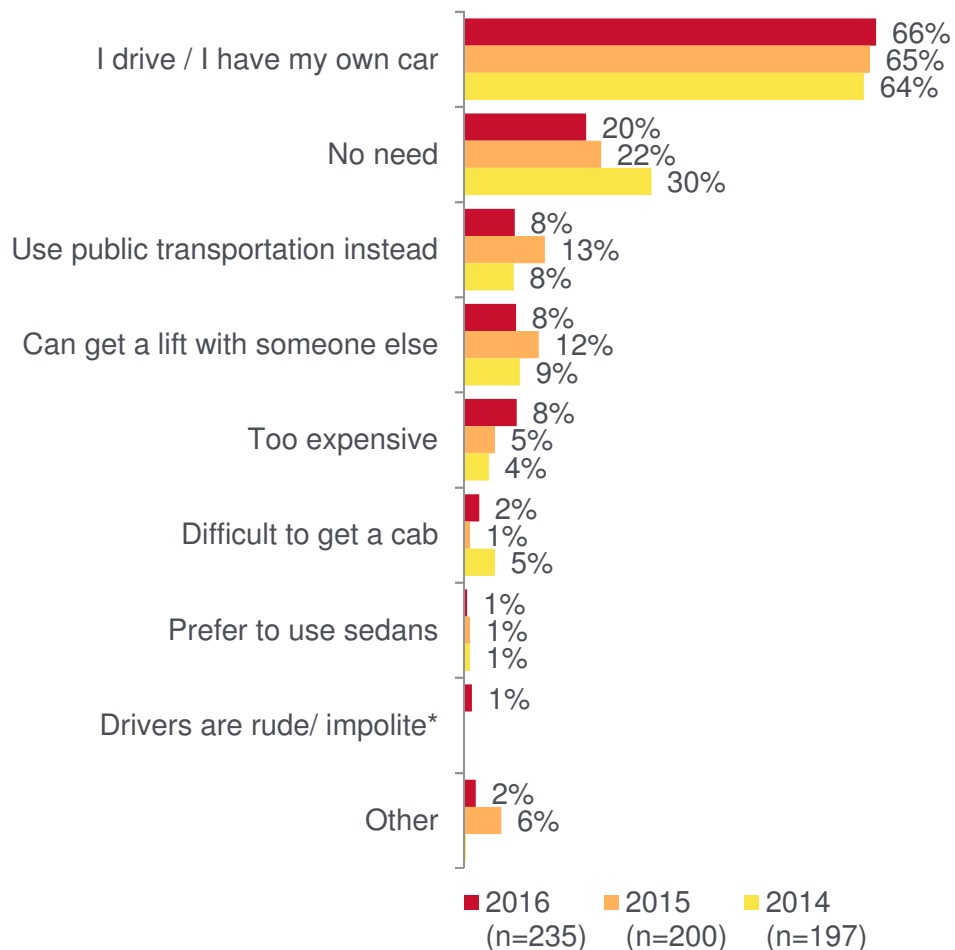
- Taxi users have most often used Checker Yellow Cabs (43%) and Associated Cabs (33%) this past year. These two companies appear to hold a sizeable majority (76%) of the market share. Market share has slightly increased for Checker Yellow Cabs and slightly decreased for Associated cabs.
- Further, 8% of taxi users have most often used Mayfair Taxi, 1% Calgary United Cabs (significantly down since 2015), and 1% report having used Delta Cab most often this past year.
- A few respondents (2%) mention other company names and 12% cannot recall the taxi company they used most often this past year.

Base: Calgarians who have used taxi services or accessible taxi services in the past year
Q4 - When using taxi services this past year, which taxi company did you use most often?



Reasons for Not Using Taxi Services

- Multiple Responses Allowed -



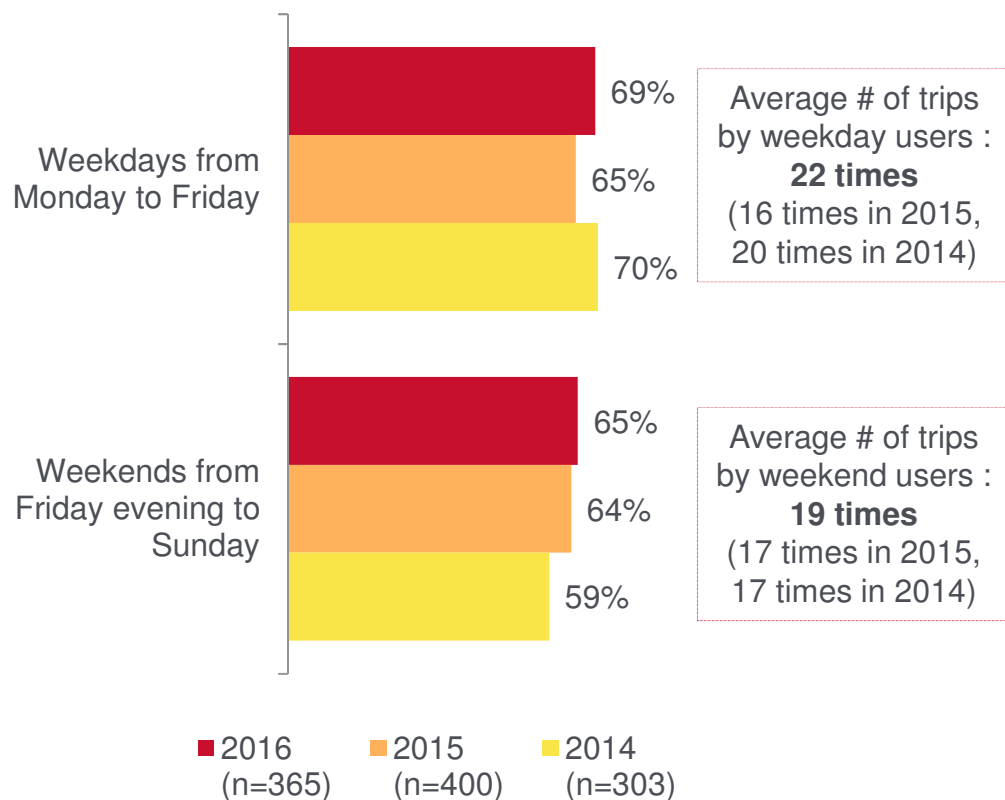
- Among those who have not used taxi services this past year, 66% explain that they use their own vehicle instead, similar to last year.
- In addition, 20% of non-taxi users report that they do not require taxi services, 8% say that they use public transit instead (a slight decrease from 13% in 2015), and 8% carpool with others (a slight decrease from 12% in 2015). Public transit usage and frequency of carpooling has returned to 2014 levels.
- Others explain that they have not used taxi services this past year because fares are too expensive (8%, a directional increase since 2014), that it is difficult to get a taxi (2%), that they prefer to use sedans (1%), and that the drivers are impolite (1%).

Base: Calgarians who have not used taxi services or accessible taxi services within the past year
 Q5B. Why have you not taken a taxi within the past year?
 *New mention in 2016



Taxi Usage by Days of the Week

- Multiple Responses Allowed -



- Within the past year, nearly identical proportions of taxi users accessed taxi services during weekdays (69%, slightly increased from 65% in 2015) and during weekends (65%, directional increase since 2014).
- Weekday taxi usage is more likely to occur among:
 - Those aged 35+
 - Those who use taxis for business or to get to work
 - Those who pre-book their taxi at a non-hotel stand or a hotel taxi stand
- Weekend taxi usage is more likely to occur among:
 - 18-34 year-olds
 - Those who use taxis for business or pleasure
 - Those who are picked up downtown and those who are dropped off downtown
 - Those who hail a taxi or obtain one at a hotel taxi stand

Base: Calgarians who have used taxi services or accessible taxi services within the past year

Q5A - Within the past year, did you use taxi services: Weekdays from Monday to Friday / Weekends from Friday evening to Sunday



Taxi Usage by Time of Weekday/Weekend

- Multiple Responses Allowed -

	2014 Weekdays (n=214)	2015 Weekdays (n=268)	2016 Weekdays (n=256)	2014 Weekend (n=178)	2015 Weekend (n=249)	2016 Weekend (n=228)
4:00am to 10:00am	43%	50%	47%	21%	16%	21%
10:00am to 3:00pm	28%	31%	37%	16%	18%	17%
3:00pm to 7:00pm	39%	40%	42%	31%	27%	28%
7:00pm to 4:00am	44%	42%	46%	74%	77%	74%
Don't know	1%	2%	1%	2%	1%	3%

- **Weekday** taxi usage is fairly constant at all times of day, albeit usage is slightly higher during the early morning rush hour (47%) and late evening 7pm – 4am (46%). Taxi usage has been increasing since 2014 for all times of day except early morning rush hour, where there is a slight decline since 2015.
- **Weekend** usage peaks during the late evening (74% between 7:00pm-4:00am), similar to 2015 (77%).

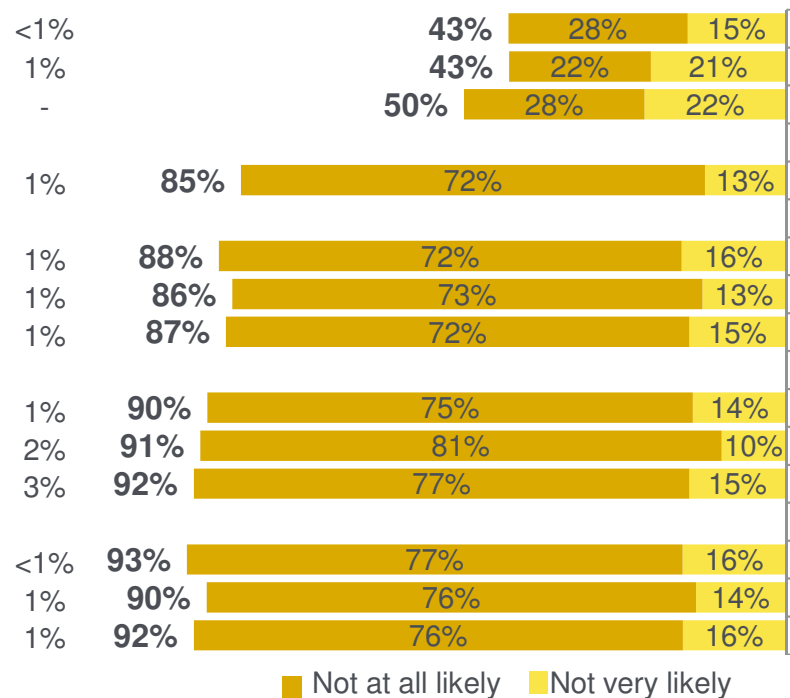
Base: Calgarians who used taxi services, or accessible taxi services within the past year during the weekdays and/or weekend

Q6. Within the past year, at which times of day did you use taxi services in Calgary during weekdays Monday to Friday?

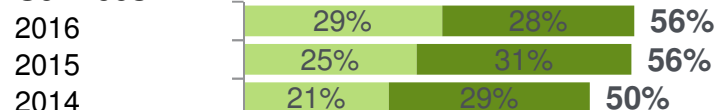
Q7. Within the past year, at which times of day did you use taxi services in Calgary on weekends between Friday evening and Sunday?

Projected Usage of Taxi Services

Don't
Know



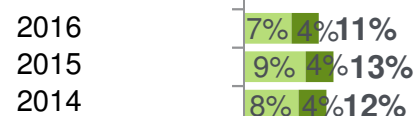
Taxi Services



Ridesharing Services*



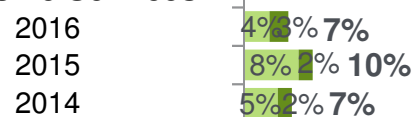
Sedan Services



Accessible Services



Limousine Services



■ Somewhat likely ■ Very likely

- Over one-half (56%) of Calgarians are likely to use taxi services within the next 12 months, identical to 2015.
- 14% of Calgarians are likely to use ridesharing services in the next 12 months. Sedan services are likely to be used by 11% of Calgarians, consistent with previous years.
- There has been a directional increase in the likelihood of usage of accessible taxi services since 2014.
- 7% of Calgarians are likely to use Limousine services over the next 12 months (slight decrease since 2015 and a return to 2014 levels).

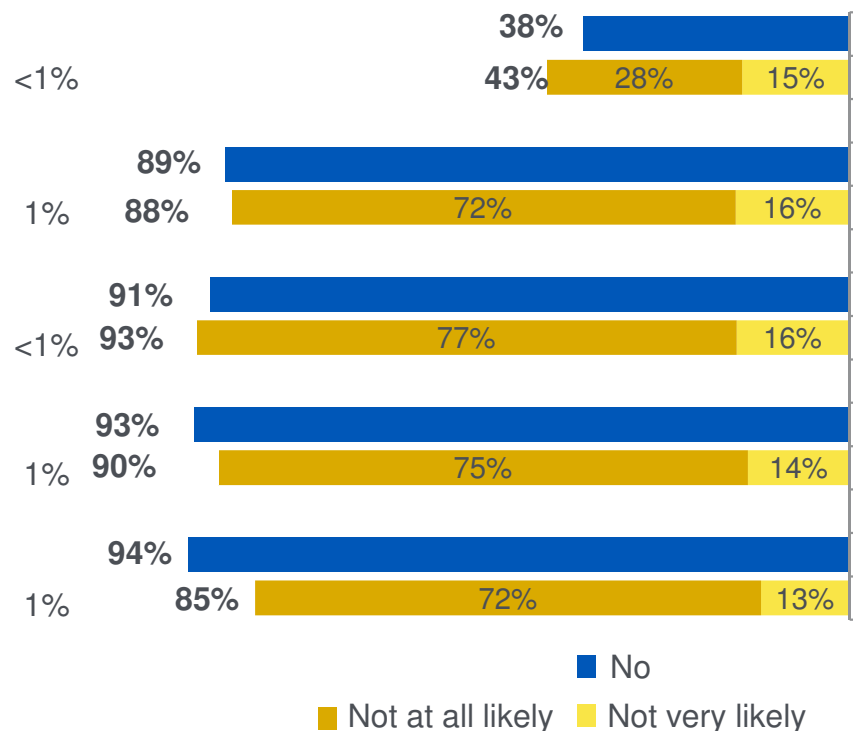
Base: All Calgarians (2016, n= 600; 2015, n=600; 2014, n=500)

Q8. Over the next 12 months, how likely will you be to use each of the following types of services in Calgary?

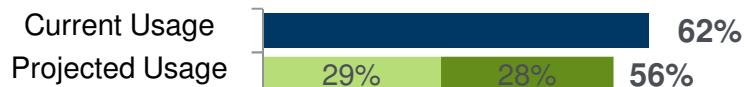
*New in 2016

Current vs. Projected Usage of Taxi Services- 2016

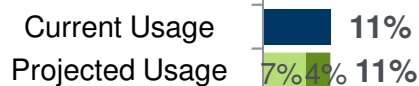
Don't
Know**



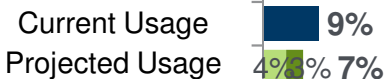
Taxi Services



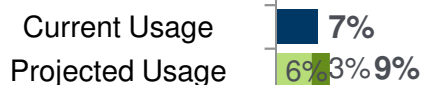
Sedan Services



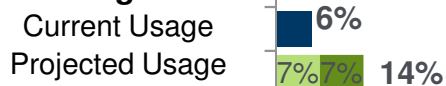
Limousine Services



Accessible Services



Ridesharing Services*



- Over half (56%) of Calgarians are likely to use taxi services within the next 12 months, lower than the current usage level (62%). The gap between current and projected usage (62%:56%) of taxi services is less wide than last year (67%:56%), due to decreased current usage.
- The current and projected usage of sedans, limousines, and accessible taxi services appears to be fairly constant over the next year.
- Based on projections, usage of rideshare services are likely to increase over the next year.

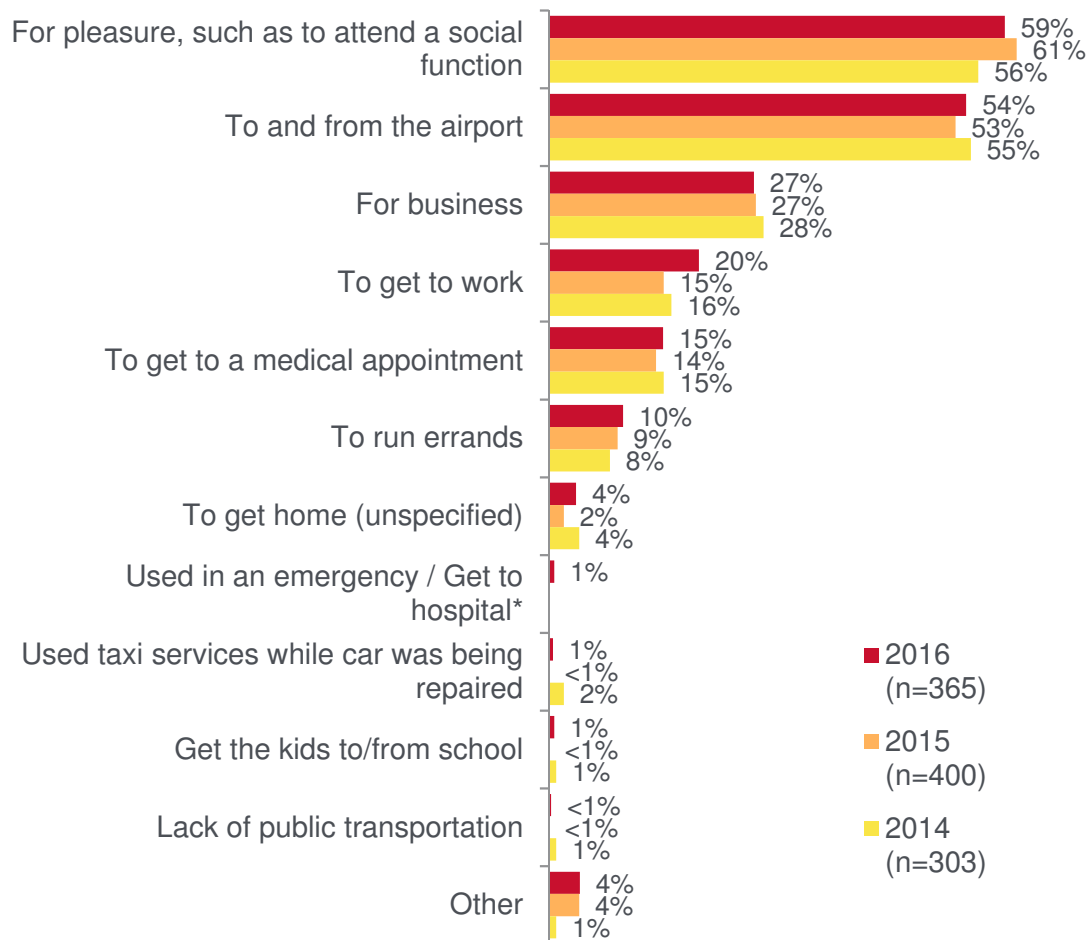
Base: All Calgarians (n=600)

Q3 - Within the past year, approximately how many times have you used each of the following types of services in Calgary? / Q8. Over **the next 12 months**, how likely will you be to use each of the following types of services in Calgary?

*New in 2016/ **Not available as an option for current usage

Purpose for Taxi Usage

- Multiple Responses Allowed -



- Taxi users mainly opt to use taxi services to attend a social function (59%, consistent with 61% in 2015), or to get to and from the airport (54%, similar to 53% in 2015).
- In addition, taxis are being used for business purposes (27%, identical to 2015), to get to work (20%, slight increase from 15% in 2015), or to get to medical appointments (15%, similar to 14% last year).
- Fewer taxi users are using taxi services to run errands (10%, directional increase since 2014), or to get home (4%, similar to 2% last year).

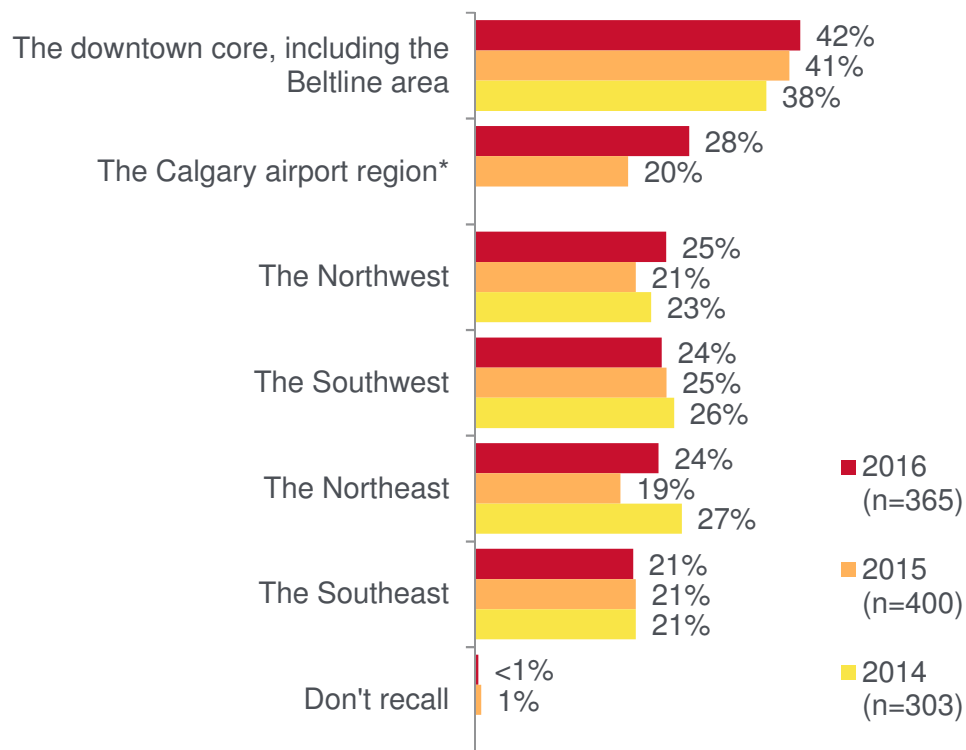
Base: Calgarians who have used taxi services or accessible taxi services within the past year

Q9. Thinking of the taxi services that you used within the past year, for what purposes did you use a taxi? Was it:

*New mention in 2016

Calgary Taxi Pick-Up Location

- Multiple Responses Allowed -



- The greatest proportion (42%) of taxi users indicate being picked up from the downtown core.
- The proportion of pick-ups across city quadrants is roughly equal, and 28% report having been picked up by taxis in the airport region (slight increase from 20% in 2015).
- Taxi pick-up locations have not changed notably over the past year.

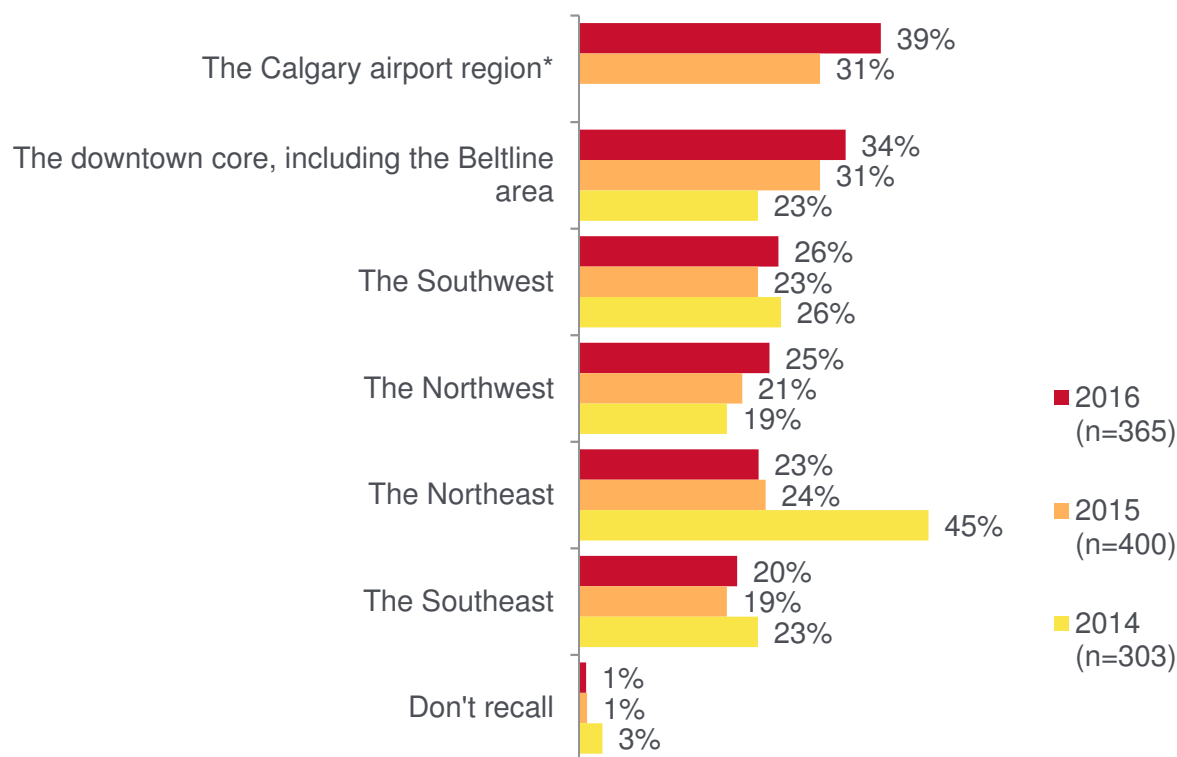
*New option added in 2015

Base: Calgarians who have used taxi services or accessible taxi services within the past year

Q11. Thinking of the taxi rides you took over the past year, from which region of the city did you get picked up?

Taxi Drop-Off Location

- Multiple Responses Allowed -



- The most common drop-off locations for taxi services are in the airport region (39%, slight increase from 31% in 2015), and in the downtown core (34%, directional increase since 2014).
- Fairly similar proportions of taxi users are being dropped off by taxis in the SW (26%), the NW (25%, trending upwards since 2014), the NE (23%) or in the SE (20%) – all comparable to 2015.

*New option added in 2015

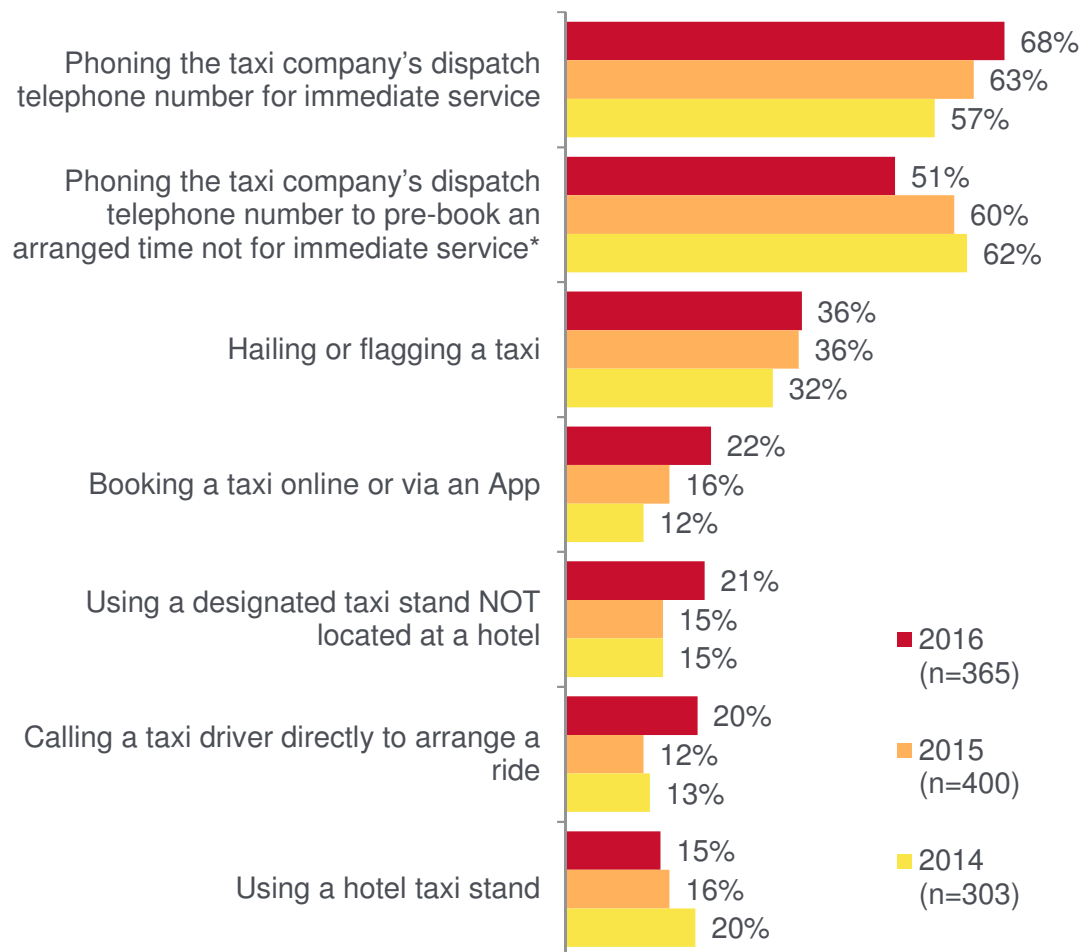
Base: Calgarians who have used taxi services or accessible taxi services within the past year

Q12. And thinking of the taxi rides you took over the past year, in which region of the city did you get dropped off?

Obtaining Taxi Services

Method Used to Obtain Taxi Services

- Multiple Responses Allowed -



- Taxi users most commonly phone dispatchers to obtain a taxi, either by phoning dispatchers for immediate service (68%, directional increase since 2014), or via pre-booking a taxi (51%, directional decrease since 2014).
- In addition, more than one-third (36%) of taxi-users report having hailed a cab this past year, 21% have used a designated taxi stand NOT located at a hotel, and 15% say they have used a hotel taxi stand (trending down since 2014).
- Not following the traditional dispatch route, 20% of taxi users are participants of "Code 8s" calling taxi drivers directly to arrange a ride, a significant increase from 12% in 2015.
- There has been a steady and significant increase of taxi users who obtained taxi services via online bookings or a taxi App in 2016 (22%) over previous years.
 - Those more likely to have used an App/online booking service include Calgarians who are aged 35 to 54 years and are heavy taxi users.

Base: Calgarians who have used taxi services or accessible taxi services within the past year

Q13. Thinking of the taxi services that you have used within the past year, which of the following methods did you use to obtain a taxi?

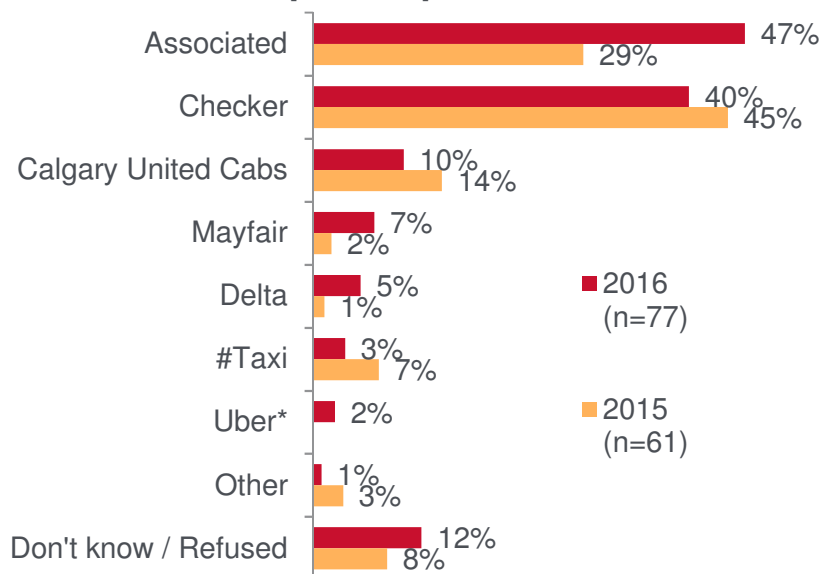
*Added "not for immediate service" in 2016.



Online Booking or App Usage Details

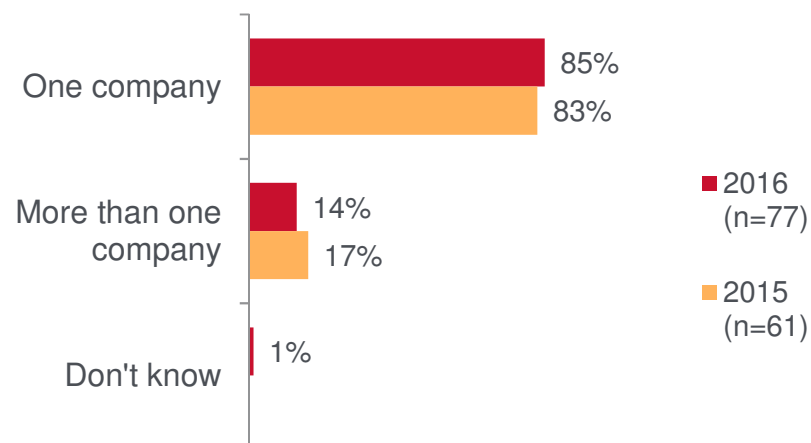
Among Taxi Users who Used Online Booking/App

Company for which Online App Used - Multiple Responses Allowed -



- Nearly half (47%) of those who booked taxis online/ via App used Associated's system (a slight increase from 2015), 40% used Checker's system and 10% used Calgary United Cabs' system (consistent with 2015).
- Fewer used Mayfair's online system (7%), Delta's online system (5%), #Taxi (3%) or Uber (2%).

Number of Companies contacted to Book a Taxi Online/ via App



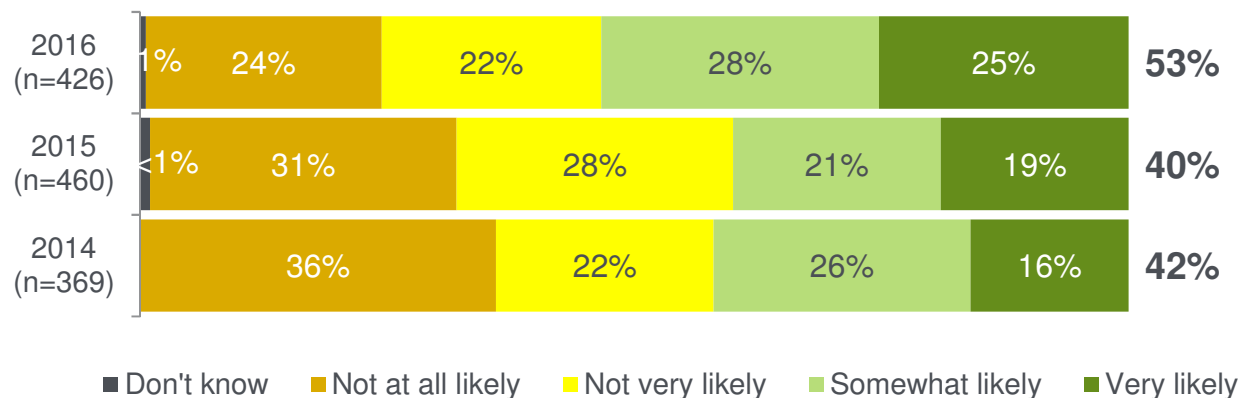
- The majority (85%) of Calgarians who booked a taxi online/via an App indicate they booked it only with one company, comparable to 83% in 2015.
- However, 14% of this group are booking taxis online with more than one company, consistent with 2015.

Base: Calgarians who booked a taxi online or via an app within the past year

Q14A - Which company's online booking system or App did you use to obtain taxi service this past year? / Q14B - When using online booking systems or Apps to obtain a taxi, do you just contact one company, or do you contact more than one company to obtain your taxi?

*New mention in 2016

Likelihood to Use Online Booking System



- One-in five (22%) taxi users have obtained taxi services via online booking systems or an App this past year.
- In contrast, more than half (53%) of Calgarians who are likely to use taxi or accessible taxi services next year would be likely to use an online booking system within the next year, a significant increase from 2015 results (40%).
- The intensity of likelihood of usage has also increased since previous years.
- Calgarians who are more likely to use an online taxi booking system in the next year include those aged 18 to 54 years, and those who use taxis for business, pleasure or to get to work.

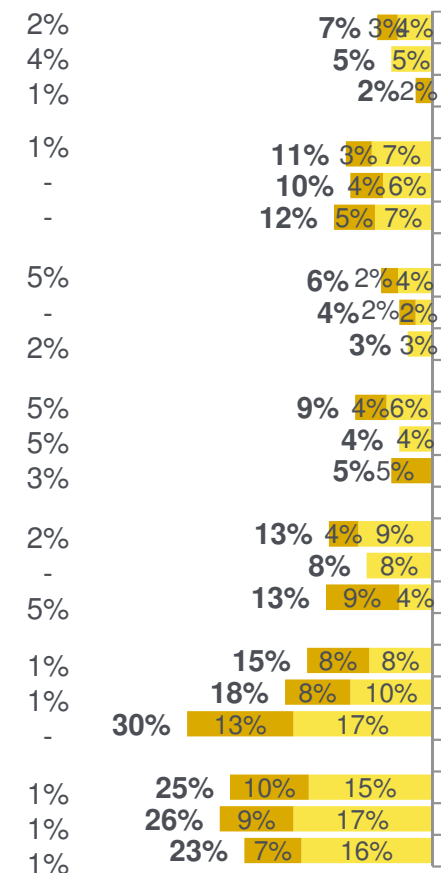
Base: Calgarians who are very likely, somewhat likely, or not very likely to use taxi services or accessible taxi services over the next 12 months (2014/2015) Q16. How likely would you be to use online booking systems for taxi services in the next 12 months?

(2016) Q16. How likely would you be to use online-enabled booking systems [including APPs] for taxi services in the next 12 months?

Note: Slight change in question wording in 2016

Satisfaction with Method Used to Obtain Taxi Services

Don't Know



Using a designated taxi stand NOT located at a hotel

Phoning the taxi company's dispatch telephone number to pre-book an arranged time not for immediate services**

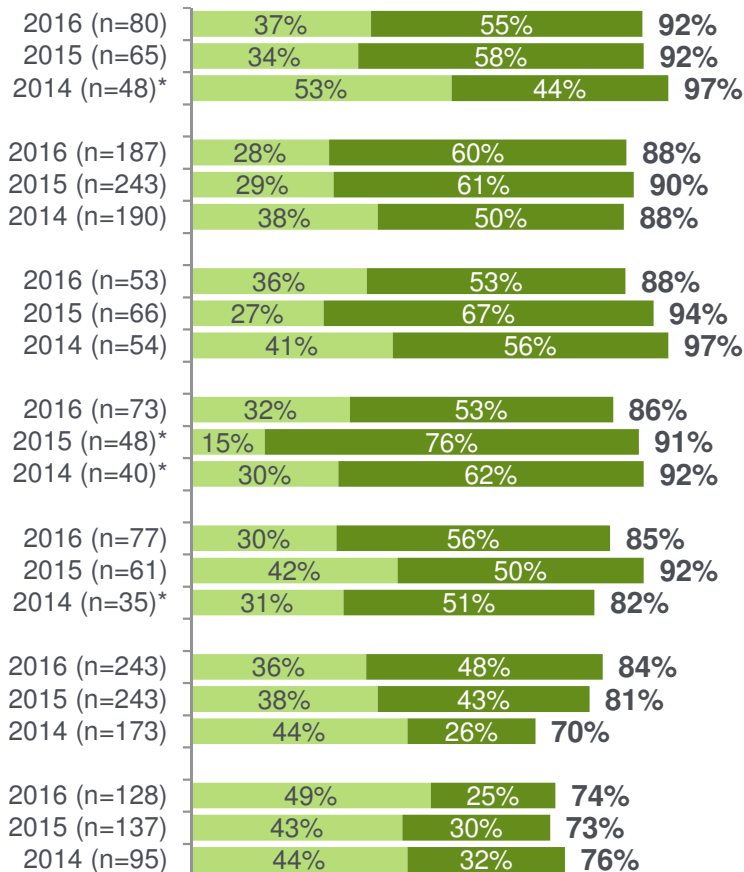
Using a hotel taxi stand

Calling a taxi driver directly to arrange a ride

Booking a taxi online or via an App

Phoning the taxi company's dispatch telephone number for immediate service

Hailing or flagging a taxi



Very dissatisfied Somewhat dissatisfied

**Small sample, interpret with caution*

Somewhat satisfied Very satisfied

Base: Calgarians who have used each method within past year when obtaining a taxi

Q15. How satisfied or dissatisfied are you with each of the methods you used to obtain a taxi within the past year?

** Added "not for immediate service" in 2016

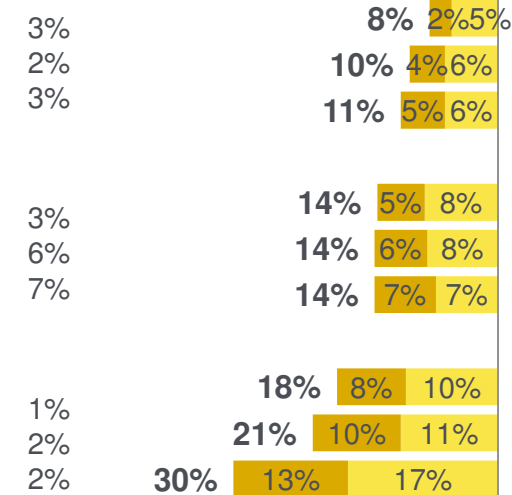
Satisfaction with Method Used to Obtain Taxi Services

- The majority of taxi users are satisfied with all methods of obtaining a taxi. Satisfaction remain largely consistent with previous years with only some directional changes.
- Satisfaction is high when obtaining taxi services at a designated taxi stand not located at a hotel (92%, identical with 2015),
- Further, 88% of taxi users are satisfied with pre-booking taxi services with dispatchers (similar to 90% in 2015) or using a hotel taxi stand (88%, trending downward since 2014).
- Satisfaction with using the “Code 8” approach to arrange rides directly with taxi drivers is also very strong (86%). However, the intensity of satisfaction with calling the driver directly has significantly decreased since 2015 (from 76% to 53% saying very satisfied) .
- A large majority (85%) of taxi users is also satisfied with using online booking systems/Apps (a slight decline from 92% in 2015). 84% are satisfied with calling dispatchers to obtain immediate service, trending upward since 2014.
- Roughly three-quarters (74%) are satisfied with hailing a cab when needing taxi services, consistent with previous years.

Dispatchers

Satisfaction with Dispatchers

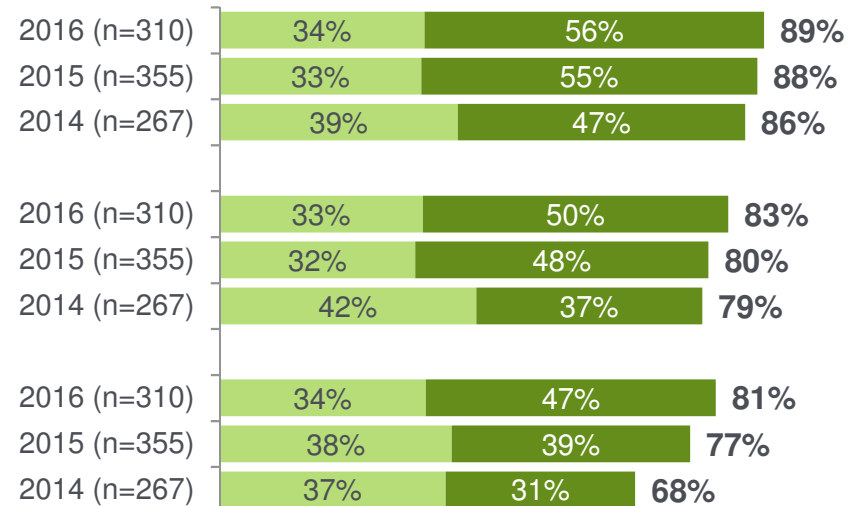
Don't Know



The courteousness of dispatchers

Dispatchers explaining the expected wait time for the taxi to arrive

Your ability to speak with a dispatch operator in a timely manner



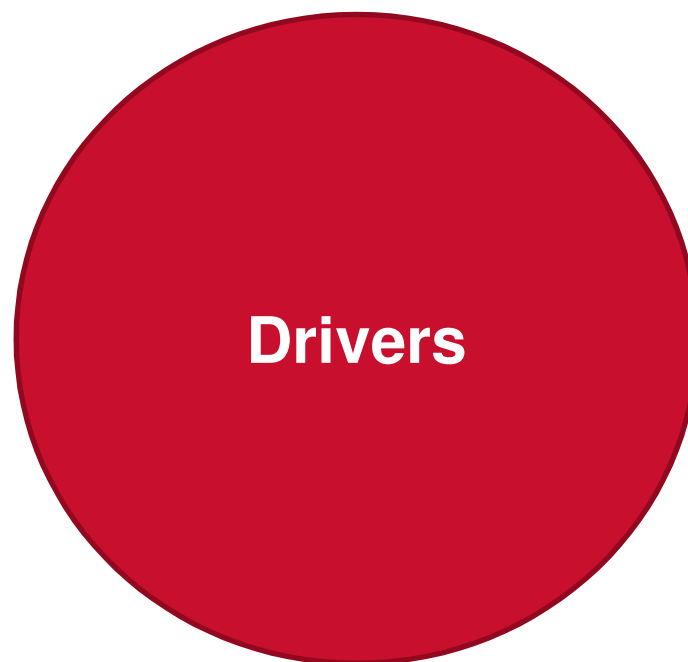
Very dissatisfied Somewhat dissatisfied

Somewhat satisfied Very satisfied

- The majority of taxi users who phoned dispatch within the past year are satisfied with the courteousness of dispatchers (89%), with dispatchers explaining the expected wait time for taxis to arrive (83%) and with their ability to speak with a dispatcher in a timely manner (81%). Satisfaction with all parameters is trending upward since 2014.
- The intensity of satisfaction with all parameters is high (nearly half or more) and is trending upward since 2014.

Base: Calgarians who phoned the company's dispatch telephone number within the past year

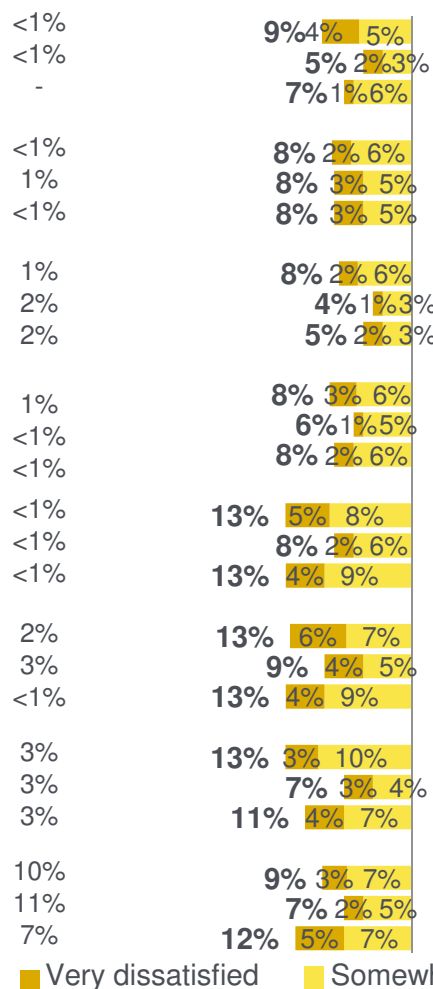
Q17. Please now think of your overall experiences calling the company's dispatch telephone number this past year. How satisfied or dissatisfied are you with each of the following:





Satisfaction with Drivers

Don't Know



Your overall satisfaction with taxi drivers

Driving in a safe manner which adheres to driving laws

The professional appearance of the drivers

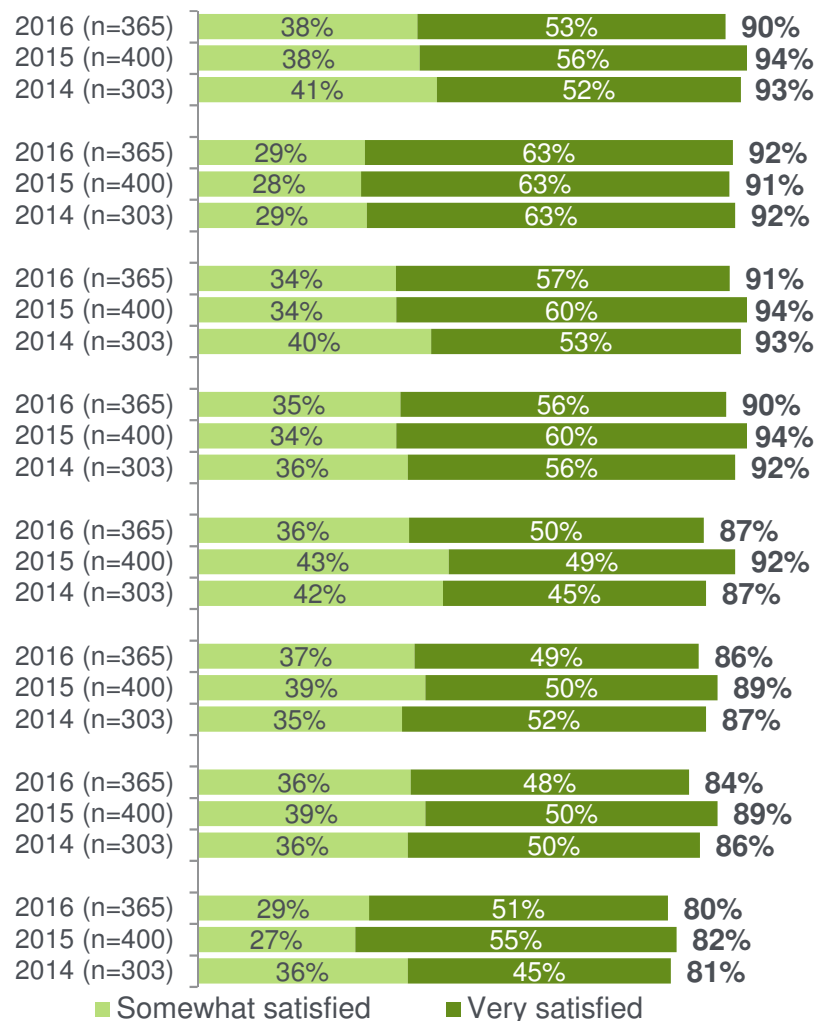
The courteousness of drivers

The ease of communications with drivers

The driver taking the most economical route to your destination

The drivers' knowledge of the city's communities, landmarks and roads

The helpfulness of the driver with any assistance required



Base: Calgarians who have used taxi services or accessible taxi services within the past year

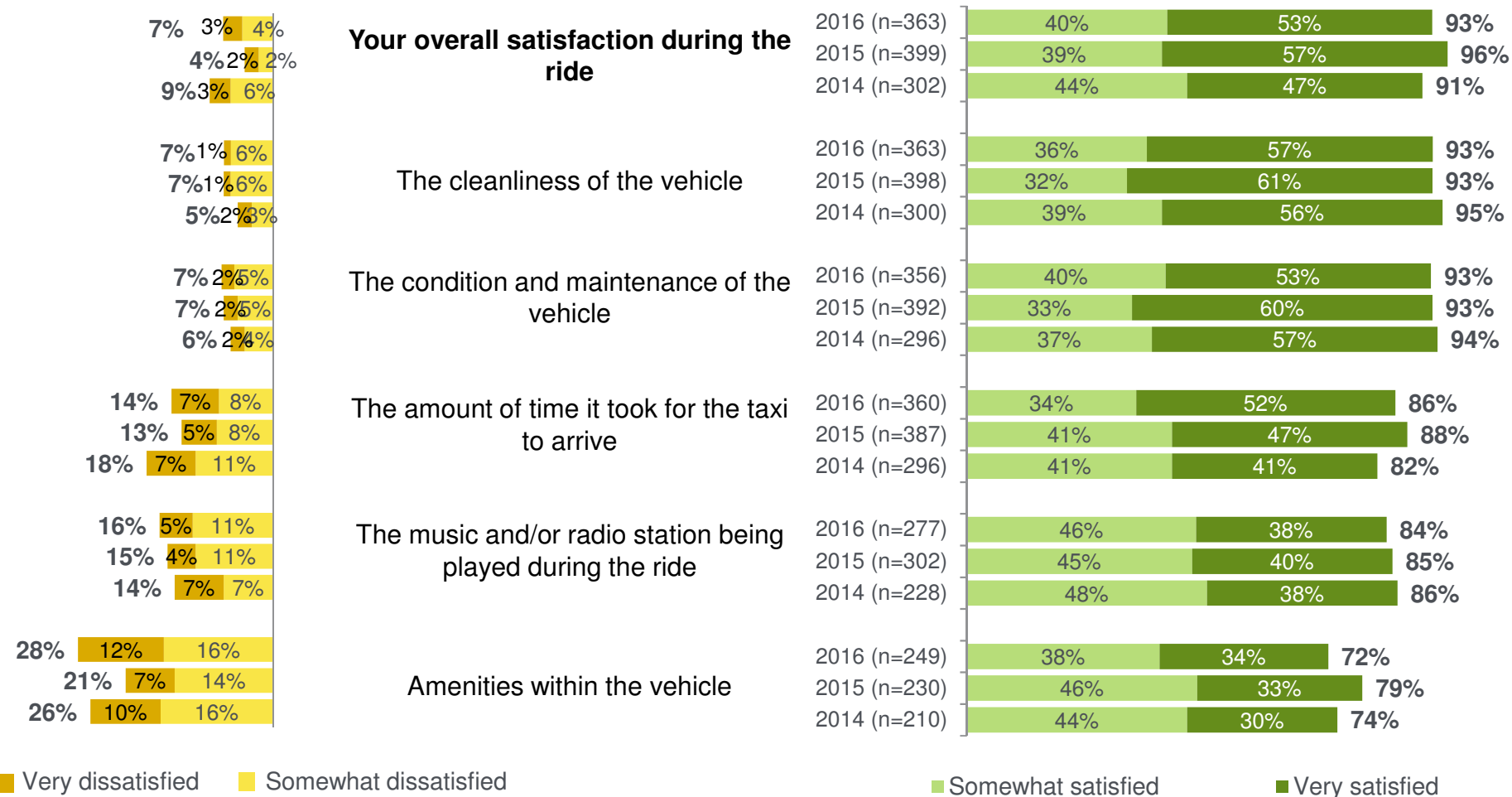
Q18. Please now think of your overall experiences with the taxi drivers you have had within the past year. How satisfied or dissatisfied are you with each of the following:

Satisfaction with Drivers

- Satisfaction levels remain consistent with previous years with only a few directional changes.
- A high majority (90%) of taxi users are satisfied overall with taxi drivers, a slight decline from previous years.
- More than 9-in-10 taxi users are satisfied with the safe manner in which they drive (92%), professional appearance of drivers (91%), and with the courteousness of drivers (90%).
- Further, a sizeable majority is also satisfied with the ease of communication with drivers (87%), drivers taking the most economical routes (86%), with drivers' knowledge of the city (84%), and with the helpfulness of the driver providing assistance (80%).

Experiences During the Ride

Satisfaction with Experiences During the Ride



Base: Calgarians who have used taxi services or accessible taxi services within the past year – excluding N/A and Don't know respondents

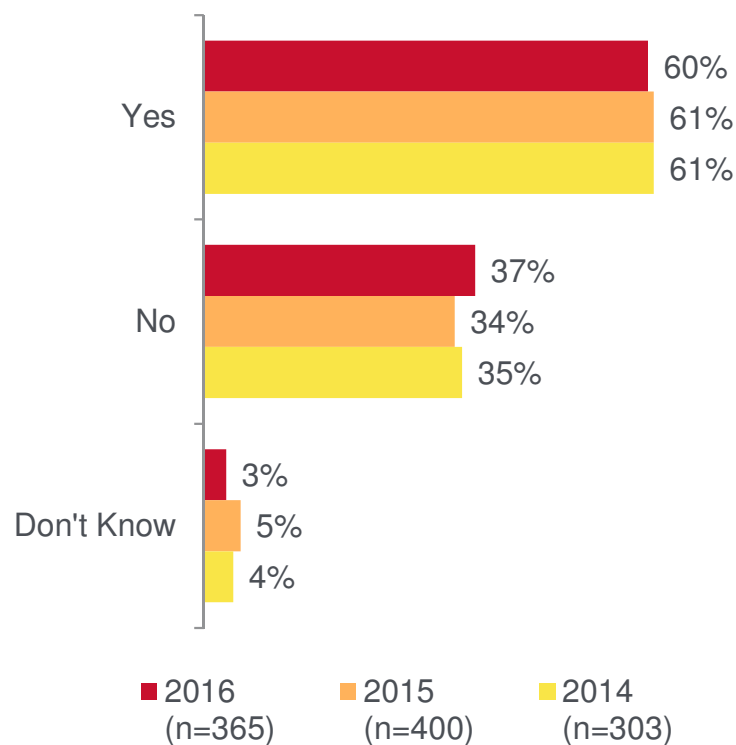
Q19. Thinking of your overall experiences during the taxi rides that you have taken within the past year, how satisfied or dissatisfied are you with each of the following:

Satisfaction with Experiences During the Ride

- Overall, taxi users remain satisfied with their various experiences during their taxi rides this past year; satisfaction levels are consistent with previous years.
- More than nine-in-ten (93%) of taxi users are satisfied with their ride overall, with the cleanliness of the vehicles and with the condition and maintenance of the vehicles.
- Further, 86% are satisfied with the amount of time it took for their taxi to arrive and 84% are satisfied with radio stations played during the ride.
- As well, 72% are satisfied with the amenities in the vehicles – down from 2015.



Drivers' Cell Phone Usage

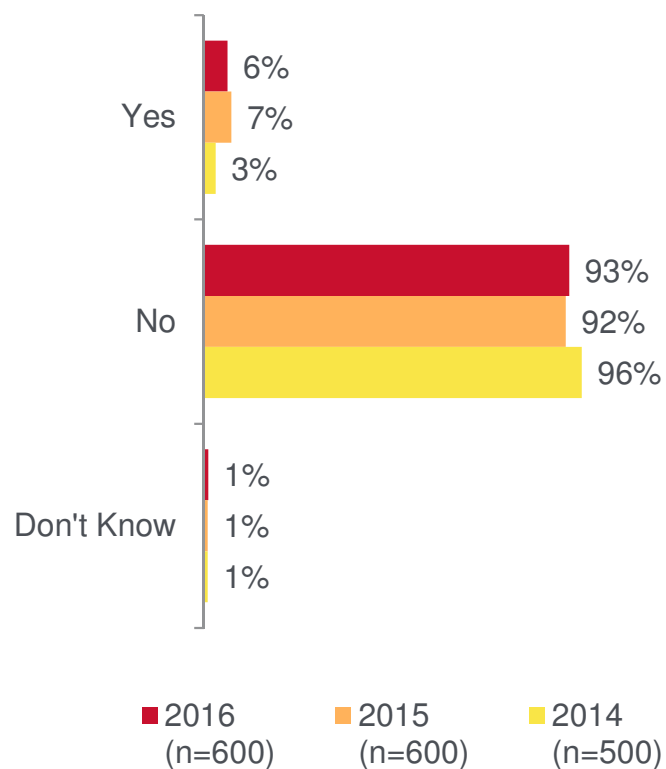


- Three-in five (60%) taxi users indicate that their driver used a cell phone or mobile device during their ride, consistent with previous years.
- Heavy taxi users are more likely to report their driver using a cell phone/mobile device during their ride.

Base: Calgarians who have used taxi services or accessible taxi services within the past year
Q20. During your taxi experiences over the past year, did any of your taxi drivers use their cell phones or mobile devices during your ride, even if using a hands-free option such as a Bluetooth?



Refusal to Provide Service



- Overall, 6% of respondents indicate that they have been refused taxi services this past year, consistent with 2015.
- The reported refusal frequency is higher among late evening (7pm -4am) weekday users.
- Reasons for refusal include disagreements with the length of the requested ride, having a pet or wheel chair, already booked for someone else and being too intoxicated.

Q21. During the past year, has a taxi driver ever refused to provide you with a ride?
Base: All Calgarians



Verbatim Responses for Reason of Refusal

"We had a cat. When I called someone to transport a cat in a cage, the dispatcher did not reject me, but when the taxi cab came we could not get into the taxi. We were at the vet and cat was in kennel." We were a group of 5. 4 of us could have sat in the back seats but the driver said no. We could have fit in the back."

"By not responding to the call because of my location of where I am, they feel that it's not worth the money, time and gas."

"I was in a wheelchair, he had to make money, they felt it was too much time and effort."

"Did not have change for 50\$. So he would not be able to give me change."

"My husband didn't like the service, so the driver told us to exit the cab."

"Not far (for distance). They also prefer cash if it is a short distance."

"Because they were already booked for someone else."

"They had somebody else that they were picking up."

"Driver refused because it was a short trip."

"It was the end of his shift."

"They wanted a better fare."

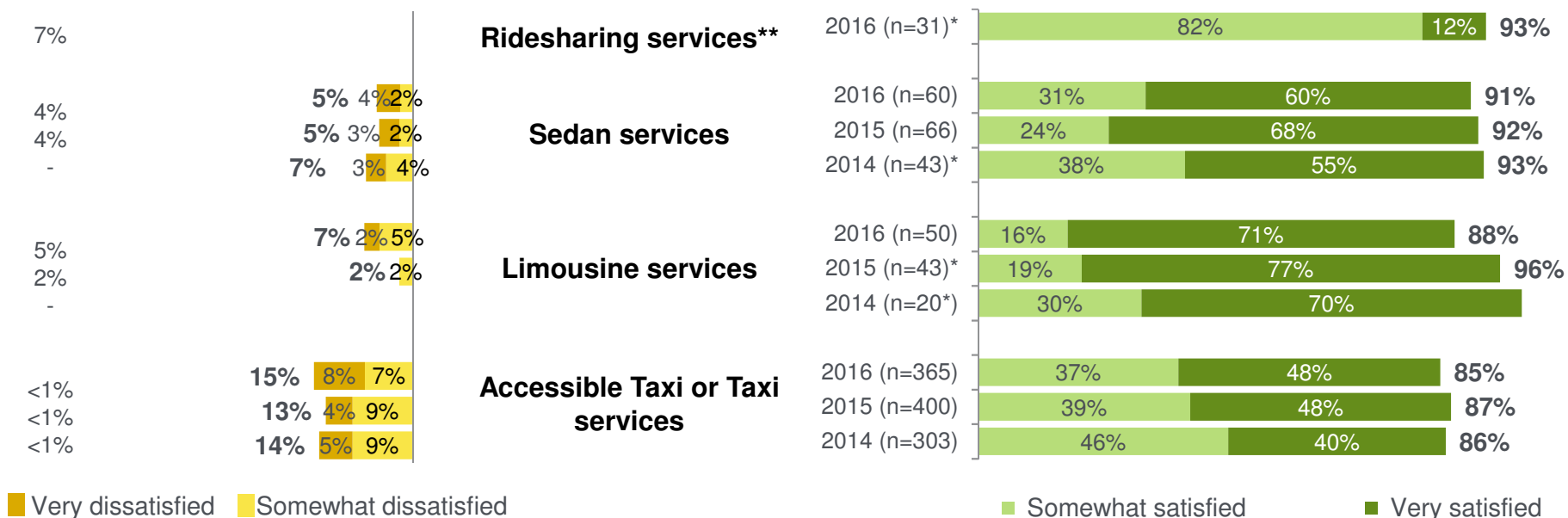
"I had a dog with us."

Q22. To the best of your recollection, for what reasons did the driver refuse to provide you with a ride?
Base: Calgarians who have been refused a ride during the past year (n=34)

**Overall
Satisfaction
with Services**

Overall Satisfaction with Services

Don't Know



**Small sample, interpret with caution*

- Satisfaction is strong for all types of “for hire” transportation services regulated by The City.
- More than nine-in-ten (93%) of users of ridesharing services are satisfied with the services, but few of these claim to be very satisfied (12%) (**caution: small sample**).
- A high majority of sedan customers (91%), limousine customers (88%) and taxi customers (85%) are satisfied with their experiences over the past year.
- Satisfaction with all types of transportation services is consistent with previous years, except limousine services which has been forming a downward directional trend since 2014 (**caution: small sample**).

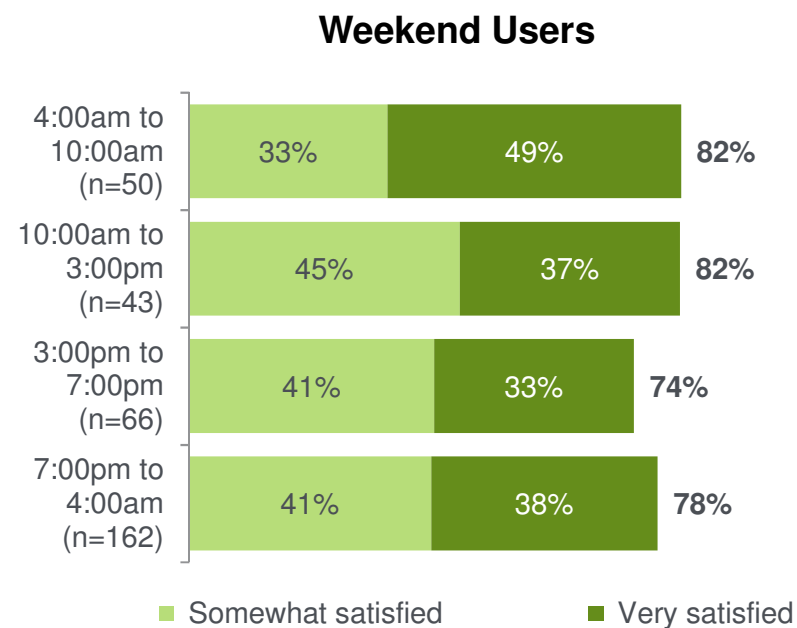
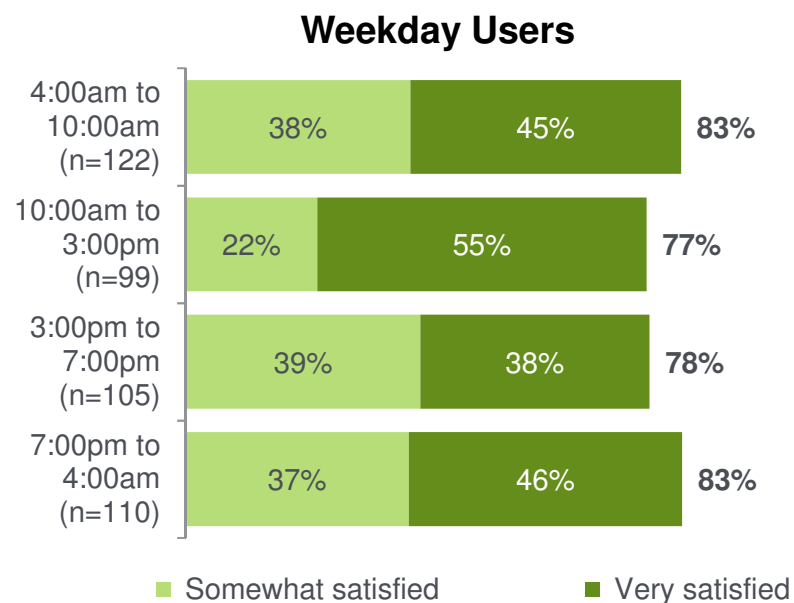
Base: Calgarians who have used the services over the past year

**New in 2016

Q23. Overall, how satisfied or dissatisfied are you with the taxi services you received in Calgary over the past year? / Q24. Overall, how satisfied or dissatisfied are you with the sedan services you received in Calgary over the past year? / Q25. Overall, how satisfied or dissatisfied are you with the limousine services you received in Calgary over the past year?

Q25a. Overall, how satisfied or dissatisfied are you with the ridesharing services you received in Calgary over the past year?

Overall Satisfaction with Taxi Services - Profiling



Q23 - Overall, how satisfied or dissatisfied are you with the taxi services you received in Calgary over the past year?

**Factors
Influencing
Overall
Satisfaction
with Taxi
Services**

Explanation of Key Driver Analysis

Purpose:

- Have the survey results explain more than 'satisfaction' scores
- Identify key strengths and opportunities for improvement

Methodology:

- We analyze satisfaction scores (% satisfied) with individual aspects of service delivery against the 'overall' satisfaction score to create an index which determines the relative impact each service delivery area has upon overall satisfaction
- Via multiple regression analysis

Key Drivers of Satisfaction with Taxi Services

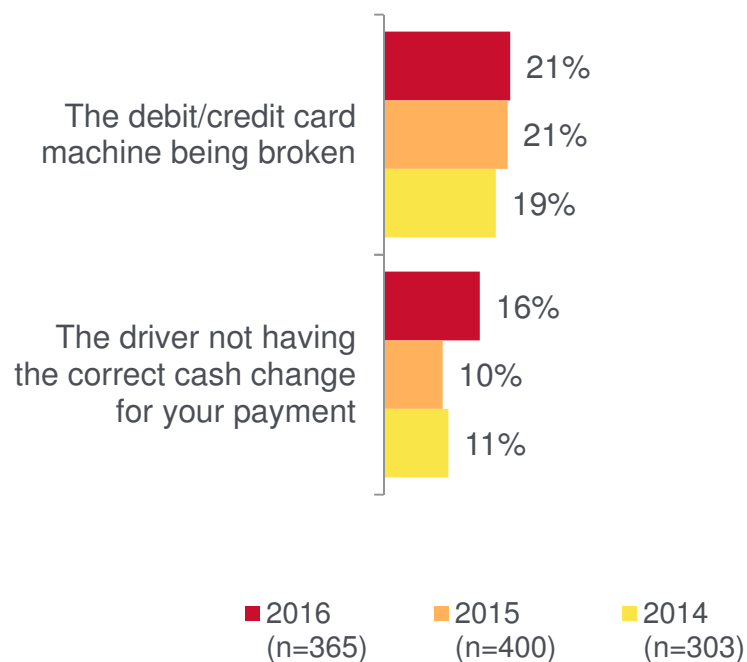


Overall Satisfaction with taxi drivers considering experiences with the driver	Importance
The ease of communications with drivers	22%
Driving in a safe manner which adheres to driving laws	17%
The drivers' knowledge of the city's communities, landmarks and roads	17%
The courteousness of drivers	14%
The helpfulness of the driver with any assistance required, such as assistance with your bags	12%
The professional appearance of the drivers	10%
The driver taking the most economical route to your destination	9%

Overall Satisfaction during the ride	Importance
The condition and maintenance of the vehicle	51%
The amount of time it took for the taxi to arrive	37%
The music and or radio station being played during the ride	12%

Payment and Value

% Yes Responses

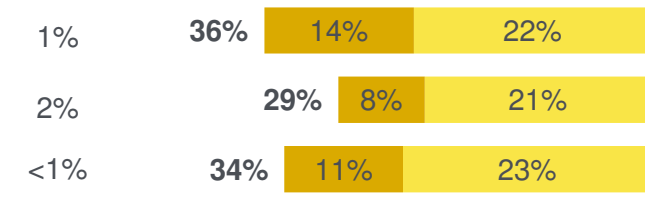


- Approximately one-in-five taxi users (21%, identical to 2015) report that they have experienced issues with the debit/credit machine being broken.
- One-in-six taxi users (16%) report that the driver did not have the correct change for their payment, a slight increase from 10% in 2015.

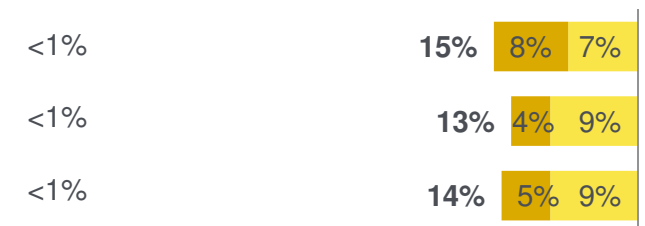
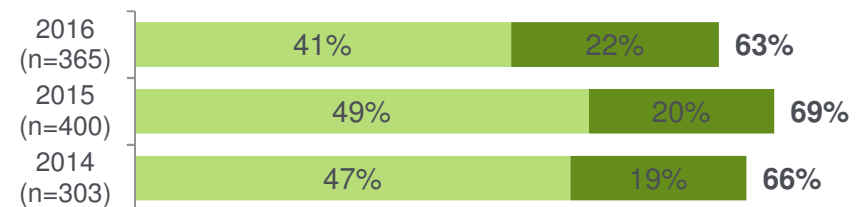
*Base: Calgarians who have used taxi services or accessible taxi services within the past year
Q27. During the past year, when paying for your taxi ride in Calgary, have you experienced:*

Satisfaction with Value for Money with Taxi Services

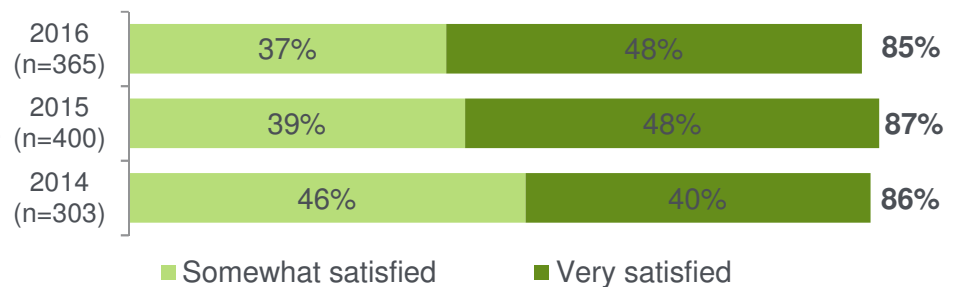
Don't Know



Satisfaction with Value for Money



Satisfaction with Taxi Services this Past Year



Very dissatisfied Somewhat dissatisfied

Somewhat satisfied Very satisfied

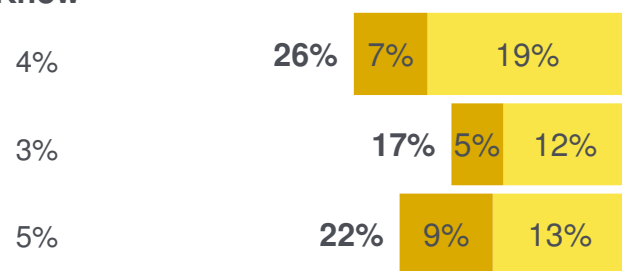
- Nearly two-thirds (63%) of taxi users are satisfied with the value for money they received from their taxi rides this past year, slight decrease from 2015.
- Some price-sensitivity is at play, as taxi users are highly satisfied with the overall taxi services they received, but less satisfied with the value for money they received.

Base: Calgarians who have used taxi services or accessible taxi services within the past year

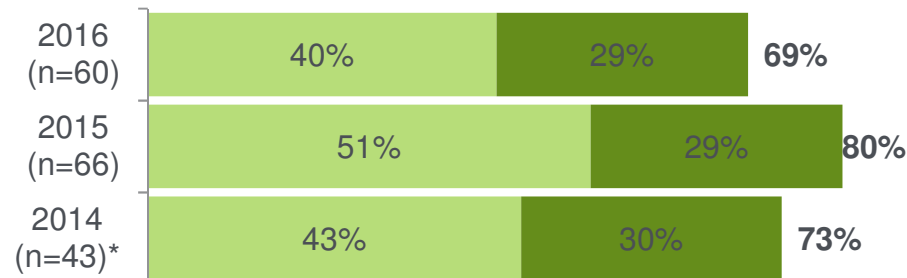
Q28. Thinking of the price you paid for the taxi rides you have taken within the past year, how satisfied or dissatisfied would you say you are with the value for money that you received? Q23. Overall, how satisfied or dissatisfied are you with the taxi services you received in Calgary over the past year?

Satisfaction with Value for Money with Sedans

Don't
Know



Satisfaction



■ Very dissatisfied ■ Somewhat dissatisfied

■ Somewhat satisfied ■ Very satisfied

**Small sample, interpret with caution*

- More than two-thirds (69%) of sedan users are satisfied with the value for money that they received, decline from 80% in 2015.
- The intensity of satisfaction with value for money for sedan rides has remained consistent since previous years.

Base: Calgarians who have used sedan services within the past year

Q29. Thinking of the price you paid for the sedan rides you have taken within the past year, how satisfied or dissatisfied would you say you are with the value for money that you received?

Satisfaction with Value for Money with Limousine Services

Don't Know

12%

14%

7%

7%

3%

14%

8%

6%

-

19%

8%

11%

Satisfaction

Very dissatisfied Somewhat dissatisfied

2016
(n=50)

36%

38%

74%

2015
(n=43)*

48%

34%

82%

2014
(n=20)*

28%

53%

81%

Somewhat satisfied Very satisfied

**Small sample, interpret with caution*

- Three-quarters of limousine users (74%) are satisfied with the value for money that they paid for their limo services this past year, a decline from 82% in 2015.
- In comparison with the value for money paid for taxi or sedan services, limousine users express the highest satisfaction levels for the value for money paid.

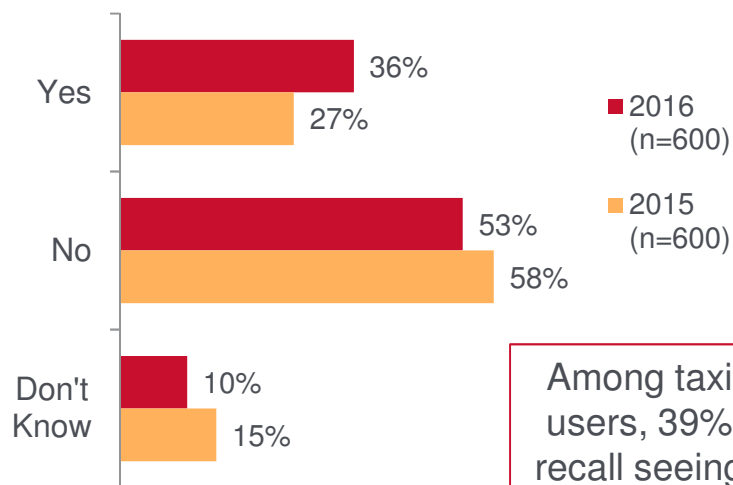
Base: Calgarians who have used limousine services within the past year

Q30. Thinking of the price you paid for the limousine rides you have taken within the past year, how satisfied or dissatisfied would you say you are with the value for money that you received?

Compliments & Complaints

Bumper Sticker Awareness

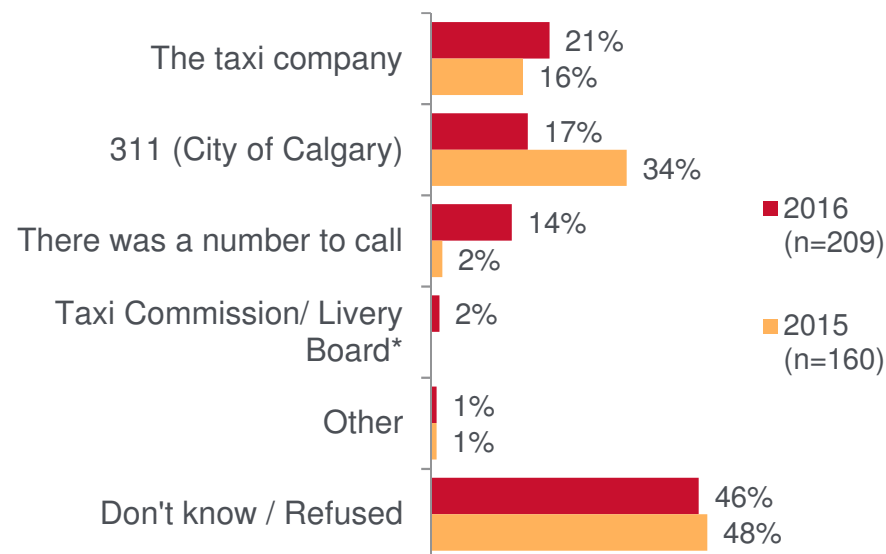
Recall Seeing Bumper Sticker?



Base: All Calgarians

Among taxi users, 39% recall seeing the bumper sticker.

Who did the bumper sticker say to contact? -Multiple Mentions Allowed-



Base: Calgarians aware of bumper sticker

- Following the mandatory implementation of displaying bumper stickers regarding compliments and complaints about taxi services, 36% of the general public recall having seen the bumper stickers (significant increase from 27% in 2015), which is similar to the level of recall among taxi users (39%).

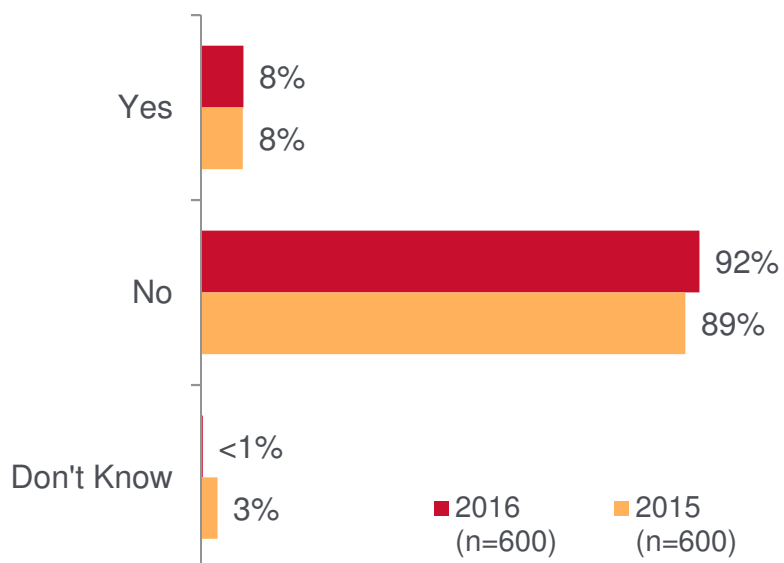
- Nearly one-in-six (17%) of those who recall the bumper sticker correctly indicates that it informed people to contact The City of Calgary via 311 – a significant decrease from 34% in 2015.
- 21% incorrectly report that the bumper sticker informed people to call the taxi company.

New question added in 2015/ *New mention in 2016

Q31 - Within the past year, do you recall seeing a bumper sticker on taxi cabs about who to contact for compliments or complaints? / Q32 - Who did the bumper sticker say to contact for compliments and complaints?

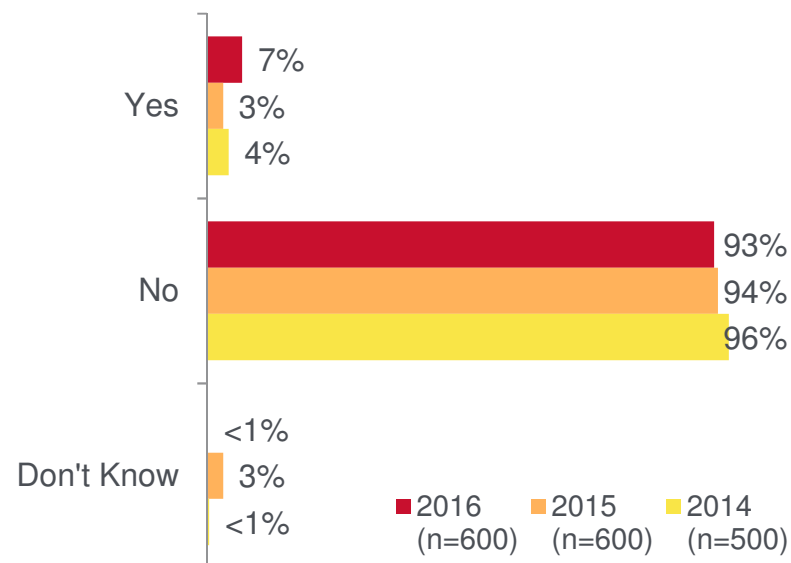
Compliments and Complaints

Made a compliment?*



- Nearly one-in-ten (8%) of Calgarians indicate that they have made a compliment about taxi services this past year, identical to 2015.

Made a complaint?



- 7% of Calgarians indicate that they have made a complaint about taxi services this past year, a significant increase from 3% in 2015.

Base: All Calgarians

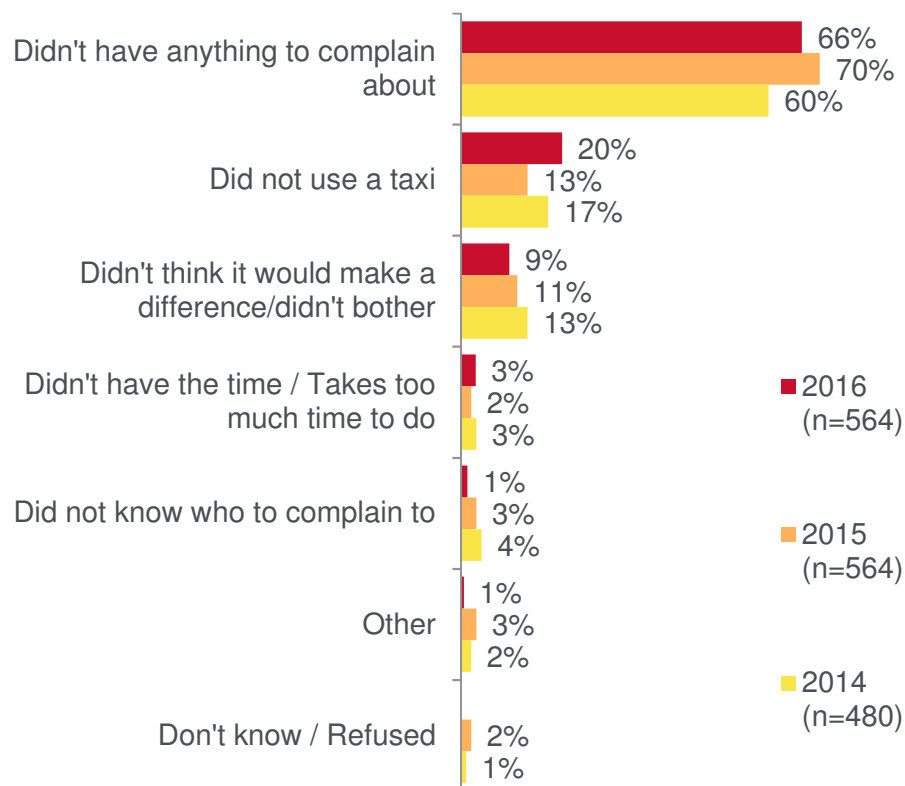
Q33A. Within the past year, have you made a complaint about taxi services in Calgary? Q33B. Within the past year, have you made a complaint about taxi services in Calgary?

*New question in 2015



Reason for Not Making a Complaint

-Multiple Responses Allowed-

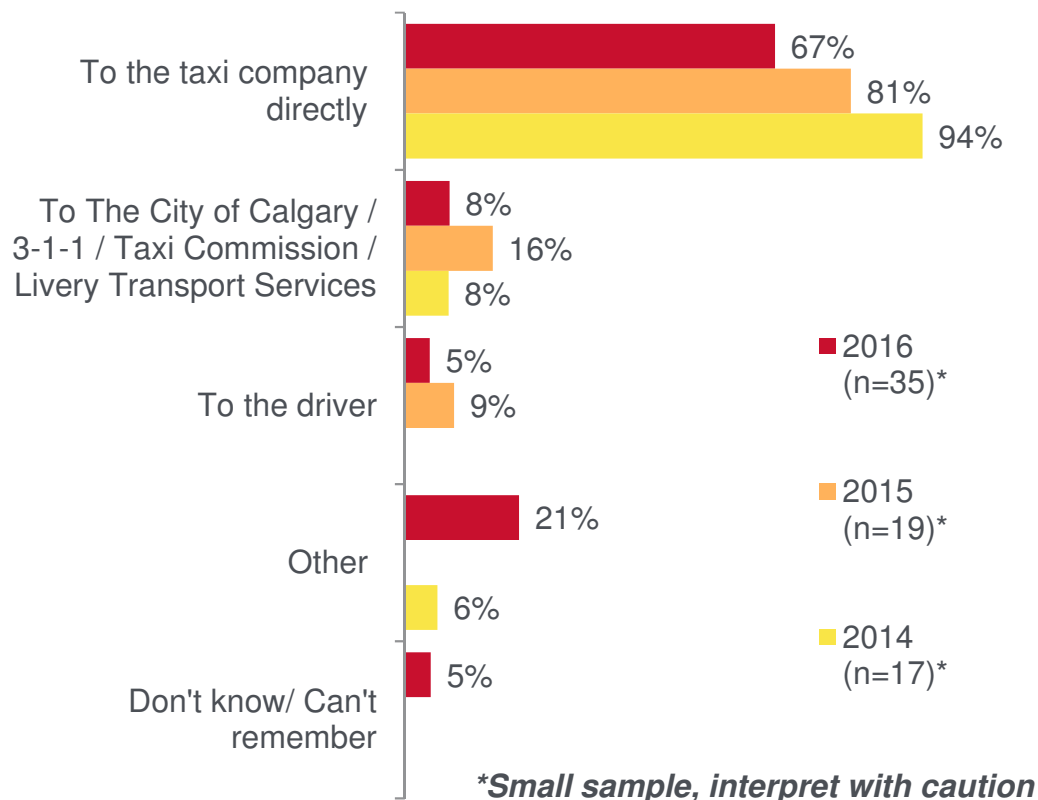


- Most Calgarians who did not make a complaint indicate they did not have any complaints (66%) or did not use a taxi (20%).
- Some (9%) did not think it would make a difference, did not have the time to complain (3%), or did not know who to complain to (1%).

Base: All Calgarians who have not made a complaint about taxi services in Calgary within the past year
Q37 - Why did you not make a complaint?

To Whom the Complaint was Made

- Multiple Responses Allowed -

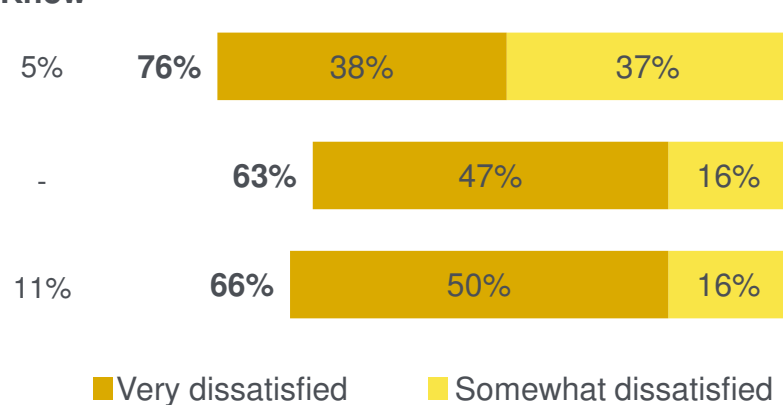


- Among the few taxi users who did make a complaint about taxi services in Calgary within the past year (**caution: small sample size**), the majority (67%) indicate that they made the complaint to the taxi company directly, a directional decrease since 2014.
- Overall, 8% of those with complaints contacted The City (311) to file a complaint this past year, showing a directional decrease from 16% in 2015 and a return to 2014 levels.

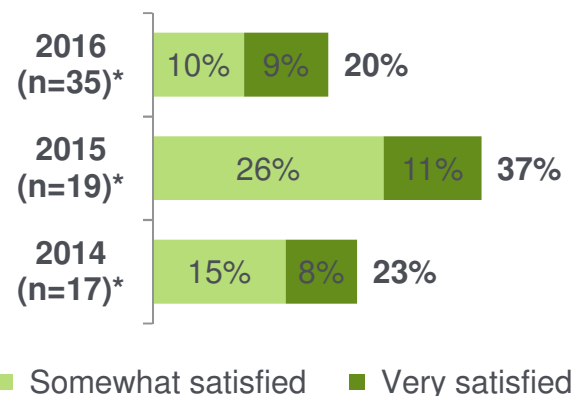
Base: Calgarians who made a complaint about taxi services in Calgary within the past year
Q38. To whom did you make the complaint?

Satisfaction with Complaint Resolution

Don't Know



Satisfaction



**Small sample, interpret with caution*

- Satisfaction with complaint resolution (20%) has dropped to 2014 levels (23% satisfaction); however due to a **small sample size**, these results are directional in nature.

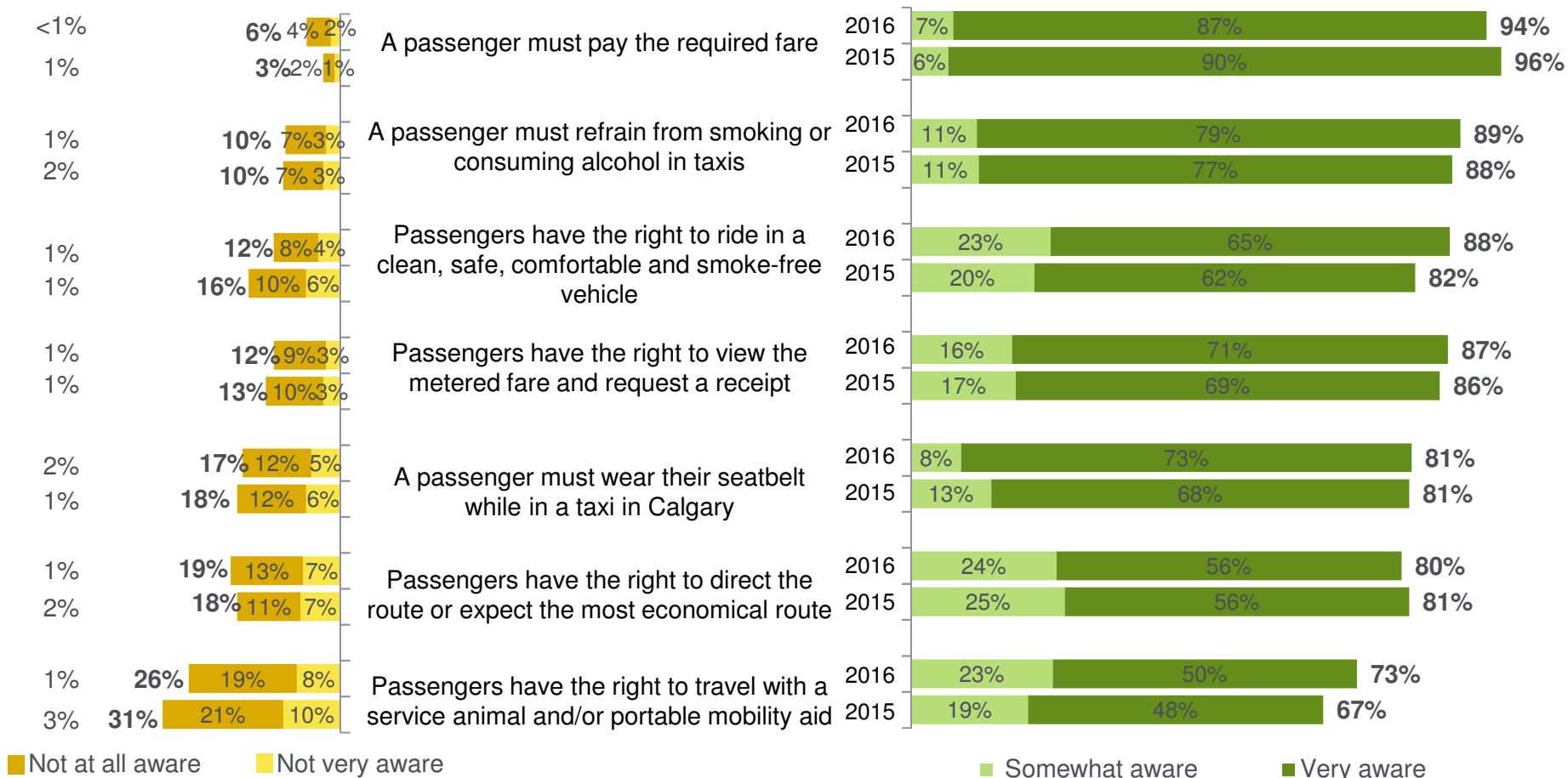
Base: Calgarians who made a complaint about taxi services in Calgary within the past year

Q36. To what extent were you satisfied or dissatisfied with the outcome or resolution to your complaint? Would you say you were:

Awareness of Rights

Awareness of Rights (1 of 2)

Don't know



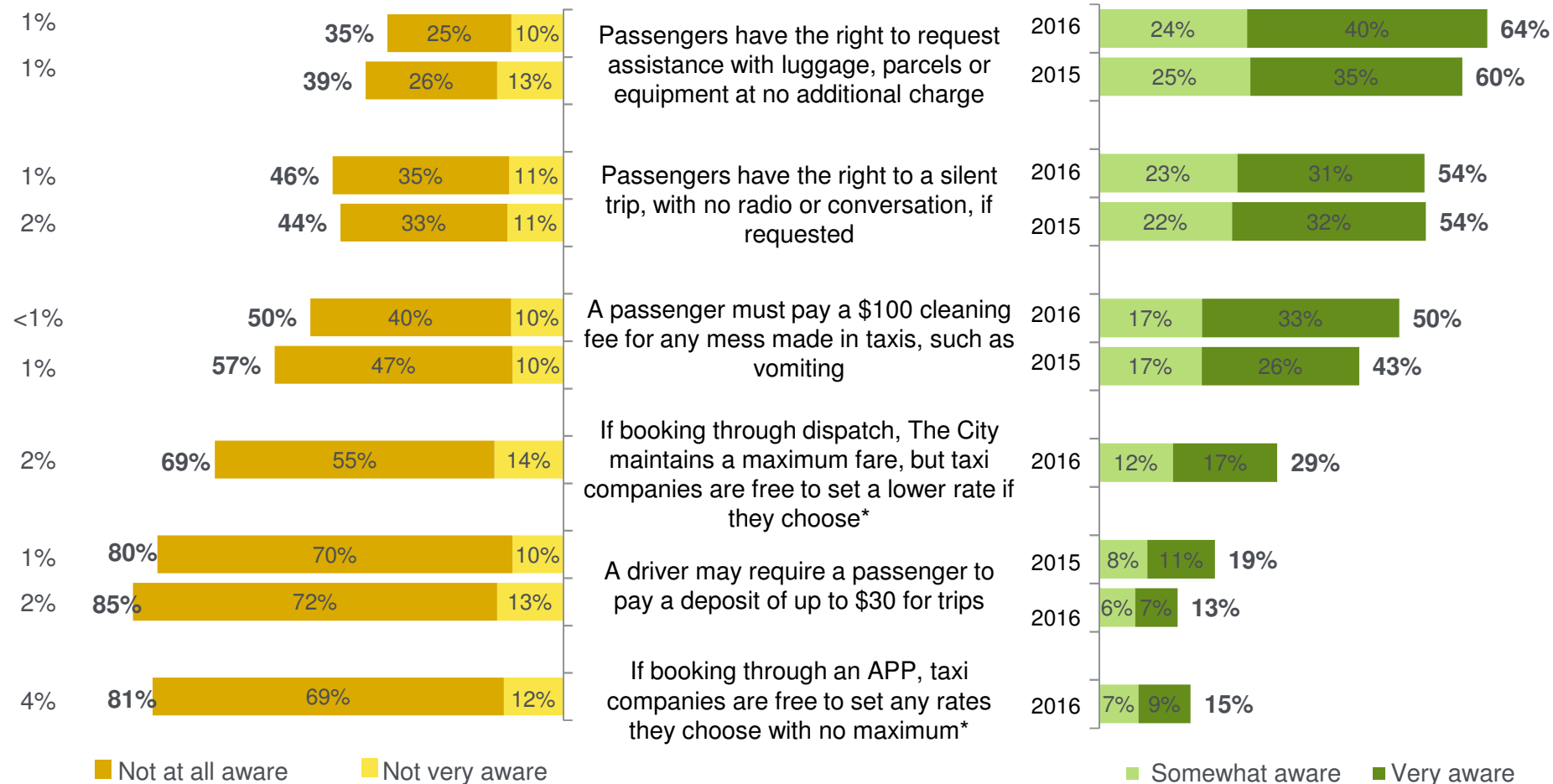
Base: All Calgarians (2016, n=600 ; 2015, n=600)

New question added in 2015

Q40 - To what extent are you aware of each of the following rights that passengers have while using taxi services in Calgary?

Awareness of Rights (2 of 2)

Don't know



Base: All Calgarians (2016, n= 600; 2015, n=600)

*New in 2016

Q40 - To what extent are you aware of each of the following rights that passengers have while using taxi services in Calgary?

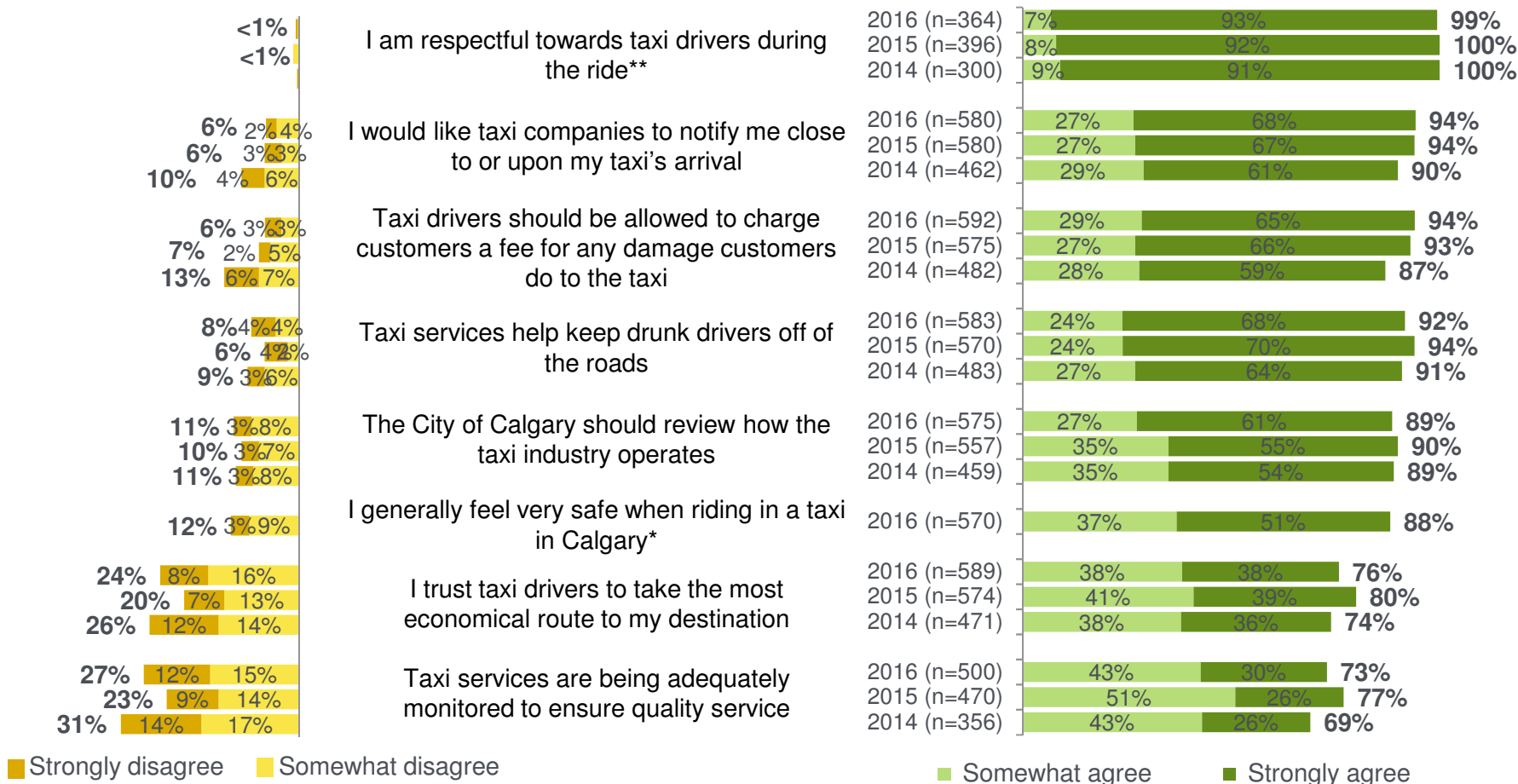
Awareness of Rights

- General awareness of passenger rights is strong for many areas (ranging from 80% to 94%); however is relatively lower for knowing that passengers can travel with service animals or mobility devices (73%) or that passengers can request assistance (64%).
- Half or more are aware that if desired they are entitled to a silent trip (54%), and that a passenger must pay a \$100 cleaning fee for any mess made by passengers during the ride (50%).
- Awareness is low about the new maximum fare rules if a taxi is booked through dispatch (29%), or if it is booked through an APP (15%).
- Awareness with all parameters is consistent with previous years with one exception - there has been a significant increase in awareness of Calgarians that drivers can ask for a deposit of up to \$30 for trips (19% vs. 13% in 2015).

**Attitudes
Towards
Taxi Services
in Calgary**



Attitudes Towards Taxi Services in Calgary (1 of 2)

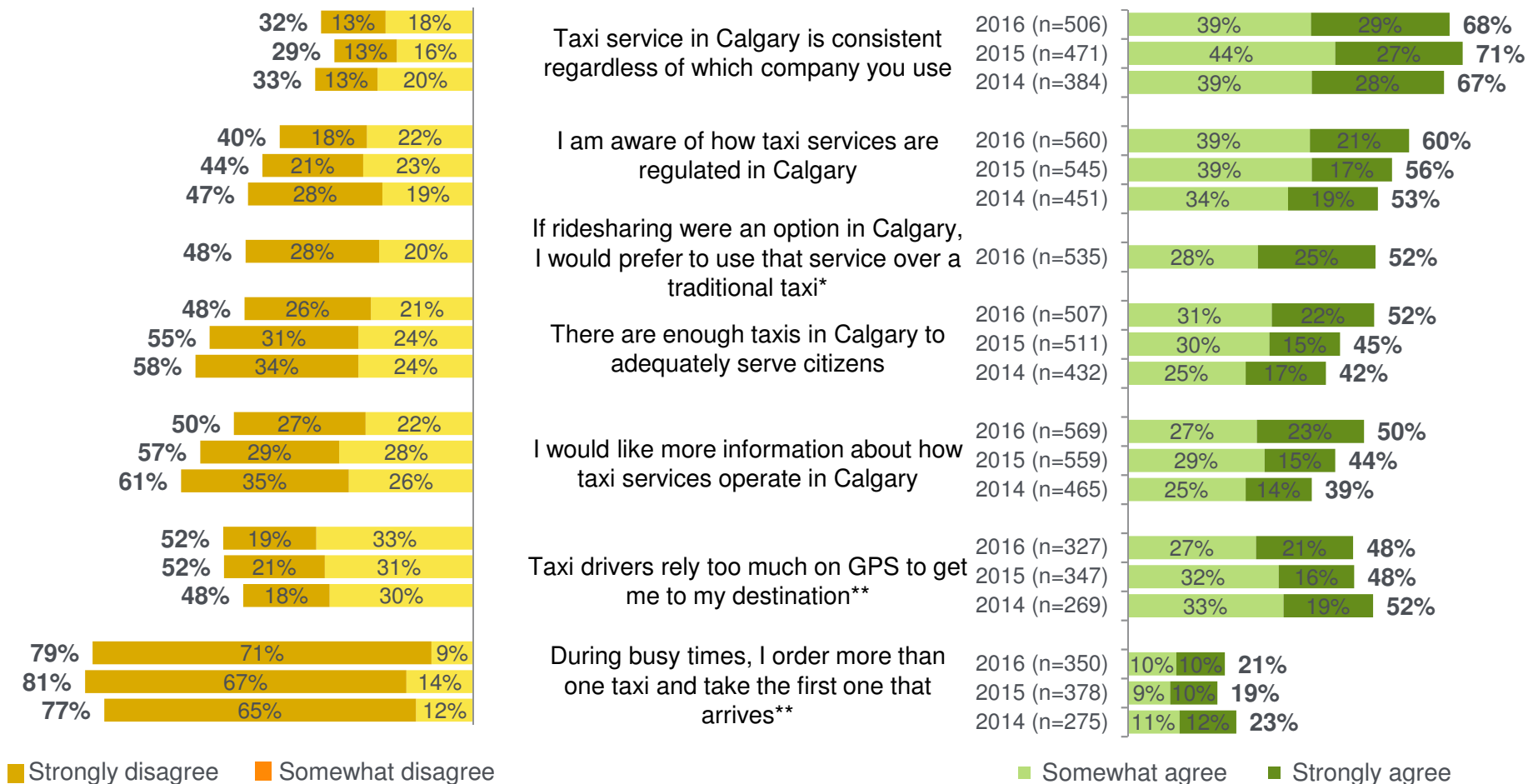


Base: All Calgarians excluding don't know and N/A respondents

Q41. I'm now going to read you a series of statements about taxi services in Calgary. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each one.

*New in 2016/ **Base: Calgarians who have taken a taxi or accessible taxi in the past year (excluding NA/Don't know)

Attitudes Towards Taxi Services in Calgary (2 of 2)



Base: All Calgarians excluding don't know and N/A respondents

Q41. I'm now going to read you a series of statements about taxi services in Calgary. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each one.

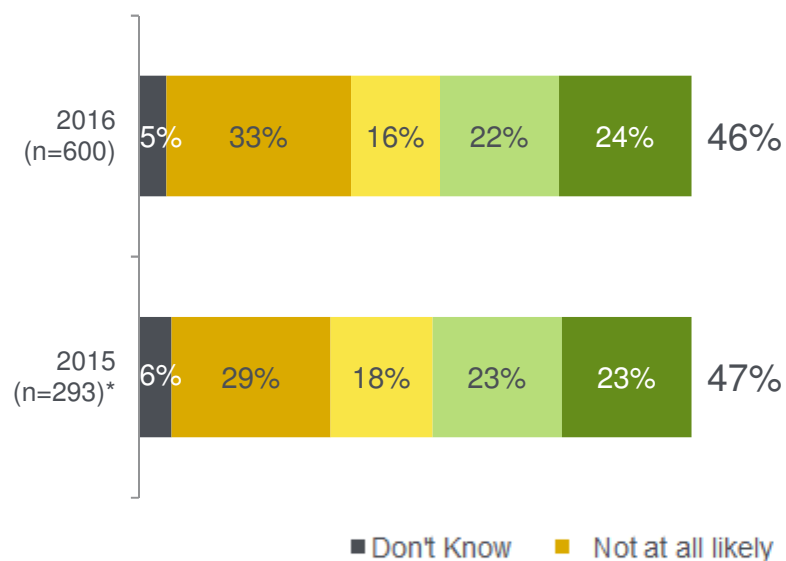
*New in 2016/ **Base: Calgarians who have taken a taxi or accessible taxi in the past year (excluding NA/Don't know)

Attitudes Towards Taxi Services in Calgary

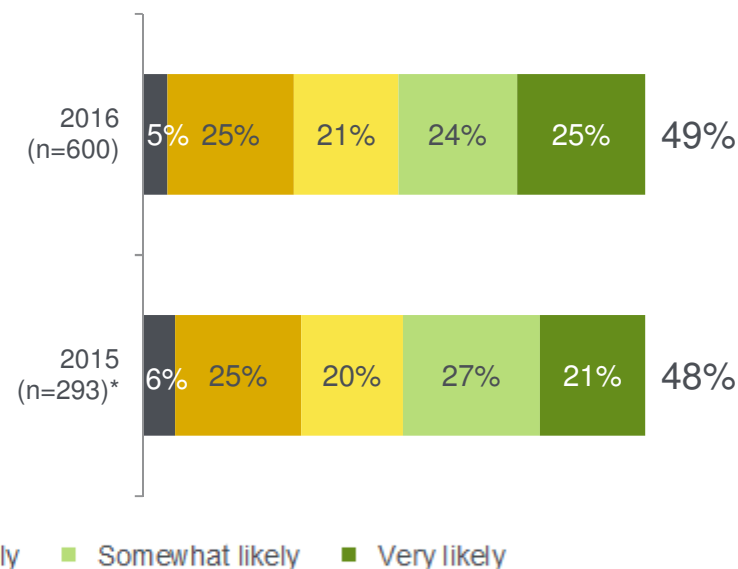
- Almost all (99%) Calgarians who used a taxi or accessible taxi in the past year agree that they are respectful towards taxi drivers during rides.
- About half or more (a range of 48% - 94%) agree with various statements regarding taxi services in Calgary.
- About one-in-five (21%) past taxi users confess that they order more than one taxi during busy times.
- Attitudes towards taxi services in Calgary remain consistent with previous years with some directional increases in agreement ratings for the following:
 - Taxi drivers should be allowed to charge customers a fee for any damage customers do to the taxi
 - I am aware of how taxi services are regulated in Calgary
 - There are enough taxis in Calgary to adequately serve citizens
 - I would like more information about how taxi services operate in Calgary

Likelihood to Bypass an Available Taxi

An accessible taxi which accommodates mobility devices



A taxi van which seats more than 5 passengers



- In 2016, nearly half of Calgarians are likely to bypass an available taxi and look for a different one if it was an accessible taxi or a taxi van, consistent with 2015.

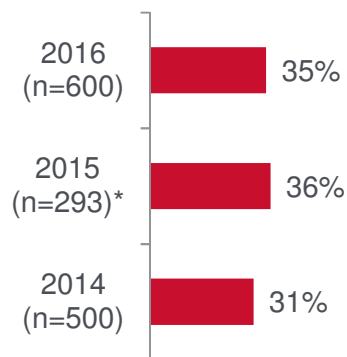
Base: All Calgarians

Q42. How likely would you be to bypass an available taxi and look for a different one if it was ..

*De-activated mid field in 2015

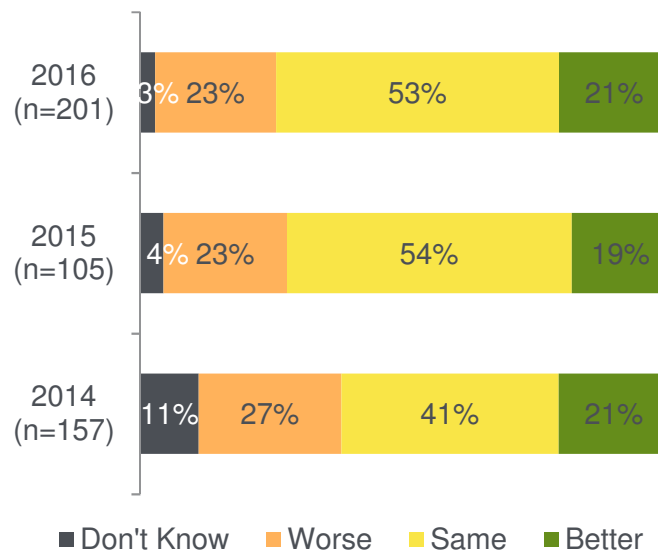
Taxi Usage Outside Calgary

Have Taken Taxi in Other Canadian Urban Centre (% Yes)



Base: All Calgarians

Service was...



Base: Calgarians who have taken taxis in other Canadian urban centres outside of Calgary

- Within the past year, over one-third (35%) of Calgarians have taken a taxi in another Canadian urban centre.
- Among these Calgarians, 53% feel that the service they received was the same as they have received in Calgary, while nearly one-quarter (23%) feel it was worse, and 21% feel it was better.
- As a net result (%better – %worse), an overall 2% of those who have taken taxis in other Canadian urban centres feel that taxi services in Calgary are worse (4% in 2015 and 6% in 2014).

Q43. Within the past year, have you taken taxis in other Canadian urban centres outside of Calgary?

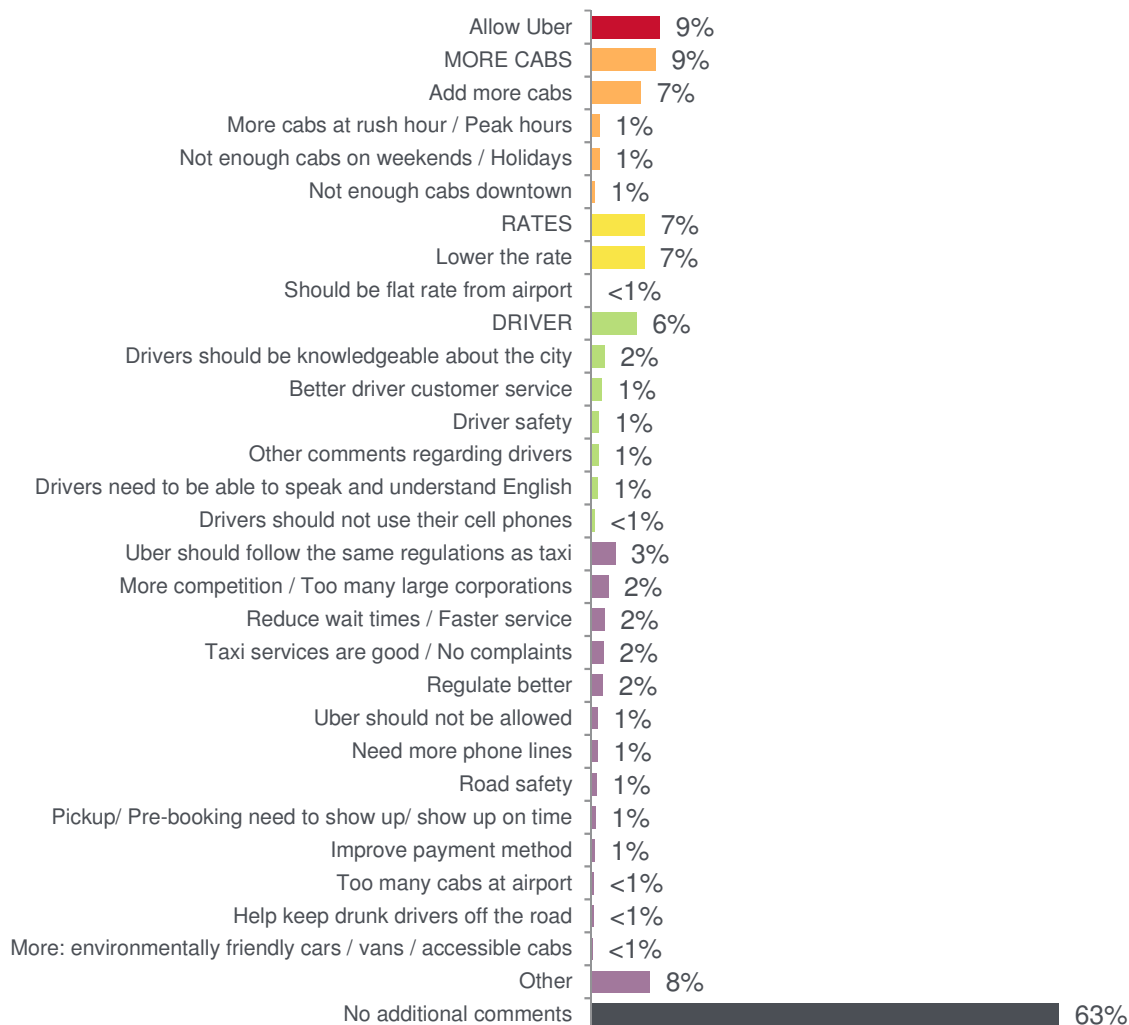
Q44. Would you describe taxi services in Calgary as being better, the same, or worse than taxi services you received in other Canadian urban centres?

*De-activated mid field in 2015

**Open
Comments**

Calgary Open Comments

- Multiple Responses Allowed -



- The majority (63%) of Calgarians did not offer any other comments regarding taxi services.
- Among those who did offer additional comments, common themes relate to allowing Uber into the market and requests for more cabs.
- Others provide comments related to expensive taxi fares and drivers.

Base: All Calgarians (n=600)

Q45. What additional comments or advice, if any, do you wish to provide The City of Calgary regarding taxi services in Calgary?



Open Comments – Selected Verbatim Responses

“The driver should not take the phone calls when they are driving.”

“The charging price should remain set regardless of the company being used.”

“Letting a more open market and allow competitions so the service providers can have more competitive pricing allowing ridesharing options.”

“Improve the way to book a taxi and/or obtain a taxi upon request.”

“I think Taxi services in Calgary are very expensive compared to other cities in general.”

“I don't think the taxi services have an impact on drunk driving. Taxis don't show up when a drunk driver calls for a taxi.”

“A strong review needs to be done. Ridesharing is available all around the world, and it is offered here as an option. A review needs to be done on how all the services will be able to work together.”

“I would like there to be more accessible taxis. My father who usually needs it, it is challenging for him to get it in last minute. It should be more available for last minute trips.”

Base: All Calgarians (n=600)

Q45. What additional comments or advice, if any, do you wish to provide The City of Calgary regarding taxi services in Calgary?

Demographics



	Calgarians (n=600)
Gender	
Male	50%
Female	50%
Age	
18 - 24 years	13%
25 - 34	21%
35 - 44	19%
45 - 54	21%
55 - 64	14%
65 years of age or older	13%
Quadrant of Residence	
Downtown Core, including the Beltline area	4%
Northwest	28%
Northeast	21%
Southeast	23%
Southwest	24%
Prefer not to answer	1%

	Calgarians (n=600)
Vehicle Access	
Yes	89%
No	10%
Prefer not to answer	1%
Member of Car-sharing Program	
Yes	7%
No	93%
Income	
Less than \$40,000	12%
\$40,000 to less than \$60,000	11%
\$60,000 to less than \$80,000	11%
\$80,000 to less than \$100,000	12%
\$100,000 to less than \$120,000	6%
More than \$120,000	25%
Prefer not to answer	23%