

Livery Services – Citizen Satisfaction 2018

Report of Telephone Survey

Prepared for The City of Calgary by:

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Context and Objectives

Context:

- In 2018, Leger was contracted by The City of Calgary Livery Services to conduct citizen satisfaction research regarding taxi and limousine services in Calgary.
- The survey has been conducted since 2014 following exploratory qualitative research which informed the design of the survey.
- Since 2014, many changes and pressures in the marketplace, including the growth of car sharing services, introduction of TNCs, economic pressures and changes in the taxi regulations could have significant influence on citizen perceptions.

This report represents the findings from the 2018 telephone survey with 587 Calgarians and includes comparisons to the data collected in 2017, 2016, 2015 and 2014.

Objectives:

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



Methodology

Data Collection:

	2014	2015	2016	2017	2018
n=	500	600	600	583	587

Current and former drivers of taxis, limousines or TNC were removed from data in 2017 and 2018.

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:

	Interview Duration	Dates
2018	15 minutes	May 23 to June 8, 2018
2017	15 minutes	May 24 to June 5, 2017
2016	16 minutes	May 25 to June 7, 2016
2015	18 minutes	June 8 to June 21, 2015
2014	13 minutes	April 24 to May 11, 2014

Margin of Error:

+/- 4.0%, 19 times out of 20

Data Analysis

Data were weighted to be representative of Calgarians 18+ by age and gender

Summary of Results





Summary of Survey Results

Usage

- Within the past year, Calgarians have used the following services:
 - Taxis – 56%
 - Accessible taxis – 2%
 - Sedans – 10%
 - Limousines – 6%
 - TNCs – 27%
- Since 2017, usage has increased for TNCs and decreased for wheelchair on-demand accessible taxis.
- Likelihood of usage for the next 12 months has decreased for taxi and accessible taxi services since 2017.
- The gap between current and projected usage (56%: 43%) has widened for taxi services since 2017.

Overall Satisfaction

- Satisfaction with all types of for-hire transportation services is high (a range of 89% - 97%) and consistent with 2017.

- The key factors influencing overall satisfaction **with taxis** include (in ranked order):
 - ❖ Overall satisfaction during the ride (cleanliness of the vehicle, condition/maintenance, time it took to arrive, amenities, music/radio being played)
 - ❖ Overall satisfaction with taxi drivers (courtesy, driving safely, ease of communication, taking the most economical route, driver's knowledge, professional appearance, helpfulness)
 - ❖ Safety during the ride
 - ❖ Value for money
 - ❖ Dispatchers (dispatchers explaining the expected wait time for the taxi to arrive, ability to speak with them in a timely manner, courtesy of dispatchers)
- The key factors influencing overall satisfaction **with TNCs** include (in ranked order):
 - ❖ Safety during the ride
 - ❖ Overall satisfaction with TNC drivers (ease of communication, courtesy, helpfulness, taking the most economical route, driving safely, driver's knowledge, professional appearance)
 - ❖ Overall satisfaction during the ride (cleanliness of the vehicle, music/radio being played, amenities, condition/maintenance)
 - ❖ Value for money
 - ❖ Online booking App

Summary of Survey Results

Safety During the Ride

- The majority of users of vehicle-for-hire services agree that they felt safe during their last ride (a range of 91%-99%).
- Safety ratings are consistent with 2017.

Payment and Value

- Overall, 67% of taxi users are satisfied with the value for money they received from their taxi rides this past year, consistent with 2017. Some price-sensitivity is evident, as taxi users are highly satisfied (89%) with the overall taxi services they received, but less satisfied with the value for money they received (67%).
- More than four-in-five (85%) of sedan/limousine users are satisfied with the value for money they received from their taxi rides this past year, comparable to 90% of users who are overall satisfied with their experience.
- Majority (89%) of TNC users are satisfied with the value for money they received from their TNC rides this past year. Intensity of satisfaction (very satisfied ratings) with value for money has decreased since 2017. Satisfaction with value for money is along the lines of overall satisfaction with TNC services.

Compliments and Complaints

- Following the mandatory implementation of displaying bumper stickers regarding compliments and concerns about taxi services, 40% of the general public recall having seen the bumper stickers (consistent with 2017).
- One-in-six (16%) of those who recall the bumper sticker correctly indicate that it informed people to contact The City of Calgary via 311 – consistent with 2017. 22% incorrectly report that the bumper sticker informed people to call the taxi company.
- If Calgarians had a complaint, they are likely to make the complaint to the company (59% for taxi complaints, 47% for sedans/limousines, and 41% for TNCs). A few Calgarians indicate that they will make the complaint to the City (17% for taxi complaints, 7% for sedans/limousines, and 7% for TNCs).

Awareness of Rights

- The majority of Calgarians are aware that passengers have the right to direct the route or expect the most economical route (79%) and to travel with a service animal and/or portable mobility aid (67%). More than half (58%) of Calgarians are aware that a passenger must pay up to \$250 cleaning fee for any mess made in a taxi.



Summary of Survey Results

- A considerably lower proportion of Calgarians are aware that drivers charge airport departure fees (35%) and that a driver may require a passenger to pay a deposit of up to \$30 for trips (19%).
- Awareness that passengers have the right to direct the most economical route, and that a passenger must pay up to \$250 cleaning fee has increased since 2017, including an increase in strong awareness.

Attitudes Towards Taxi Services

- Calgarians agree the most that taxi services should be monitored (97% agreement) and that they would like the taxi company to notify them close to or upon arrival (95%).
- A lesser proportion agree that they would like more information about how taxi services operate in Calgary (47% agreement).
- Attitudes towards taxi services in Calgary remains consistent with 2017 with an increase in agreement that there are enough taxis in Calgary to adequately serve citizens, and a decrease in agreement that Calgarians trust the taxi drivers to take the most economical route to their destination.

Attitudes Towards TNC Services

- Calgarians agree the most that they trust the TNC drivers to take the most economical route to their destination (84% agreement). A lesser proportion agree that they are aware of how TNC services are regulated in Calgary (47% agreement).
- Agreement ratings are consistent with 2017.

Likelihood to Bypass

- In 2018, nearly two-in-five Calgarians are likely to bypass an available taxi and look for a different one if it was an accessible taxi (38%, identical to 2017) and/or bypass an available taxi and look for a different one if it was a taxi van (42%, consistent with 2017).



Summary of Survey Results

Taxi Services

- Taxi users have taken 5 trips per year (median), consistent with previous years.
- The main reasons that some Calgarians have not used taxi services are similar to last year - having their own vehicles (55%), and not having a need for taxi services (23%). An increased proportion (since 2017) mention that they did not take a taxi in the past year as they are too expensive. A decreased proportion (since 2017) mention that the reason they did not use a taxi in the past year is because they use public transportation.
- Among taxi users, 72% have used taxi services during weekdays, and 62% have used taxi services on weekends (consistent with 2017).
- Weekday taxi usage is spread out between morning, afternoon and evenings. A lesser proportion uses taxis late night on weekdays. Since 2017, weekday taxi usage has increased in the mornings and afternoons; and decreased for late nights.
- Weekend usage peaks during the late evening. Since 2017, weekend usage has increased in afternoons and evenings, and decreased for late night trips.
- The purpose of taxi usage remains similar to last year, with the main reasons for using taxis being: to attend social functions (53%); and to get to and from the airport (52%).
- The greatest proportion of taxi users get picked up from downtown and dropped off at downtown or airport region.
- Taxi users most commonly phone dispatchers to obtain a taxi, either for immediate service (63%), or pre-booking a future trip (50%), consistent with 2017.
- The majority of taxi users are satisfied with all methods of obtaining a taxi. Satisfaction remains largely consistent with previous years with only some directional changes.
- 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 with courtesy of dispatchers and ability to speak in a timely manner has been forming an upward trend since 2014.
- Nine-in-ten (89%) taxi users who phoned the dispatch to pre-arrange a ride agree that their pre-booked taxi will arrive at the requested time, including three-in-five (57%) who strongly agree. The results are consistent with 2017.
- The majority (88%) of Calgarians who booked a taxi online indicate they booked only one company, consistent with 2017.
- Three-in-five (62%) of Calgarians who are likely to use taxi or accessible taxi services next year would be likely to use an online-enabled booking system within the next year (an increase since 2017).



Summary of Survey Results

- Four-in-five or more (a range of 83% to 93%) taxi users are satisfied with each aspect of taxi drivers. Satisfaction is consistent with 2017.
- Satisfaction levels with experiences during the ride remain consistent with previous years with only a few directional changes.
- Of concern, consistent with 2017, the majority (57%) of taxi users continue to encounter drivers using cell phones.
- A few (4%) Calgarians indicate that a driver has refused them to provide a taxi ride during the past year.
- Some (17%, consistent with 2017) 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 (13%, consistent with 2017).
- The greatest proportion of TNC users get picked up from downtown and dropped off at downtown.
- More than nine-in-ten (94%) TNC users are satisfied with the online booking app.
- Four-in-five or more (a range of 78% to 98%) TNC users are satisfied with each aspect of TNC drivers.
- Nine-in-ten or more (a range of 89% to 100%) TNC users are satisfied with their experience in the ride.
- Of concern, half (50%) of TNC users experience drivers using cell phones.
- A few (2%) Calgarians indicate that a driver has refused them to provide a TNC ride during the past year.
- Majority of TNC users are aware of the surge price (86%) and indicate that they are always aware of the estimated price before the ride (79%).
- One-quarter (26%) Calgarians indicate they are aware that TNCs provide accessible services.

TNC Services

- TNC users have taken 5 trips per year (median).
- Majority of TNC users have used Uber (85%).
- Among TNC users, 57% have used taxi services during weekdays, and 82% have used taxi services on weekends.
- Weekday TNC usage is spread out throughout the day, and weekend usage peaks during the late night (after 10 pm).
- The purpose of TNC usage is to attend social functions (77%).

Taxis Outside Calgary

- As a net result (%better – %worse), 2% of those who have taken taxis in other Canadian urban centres feel that taxi services in Calgary are better, as compared to 7% in 2017 who felt it was better.



Strategic Observations

Momentum is strongly in favour of TNCs

While more Calgarians are still using taxis compared to TNCs there is a shift starting in the market towards TNCs. Compared to last year, incidence of using the services of TNCs is trending up since 2016, and the gap between current and projected usage for taxi services has widened.

TNCs appear to be delivering more value for money

TNCs are delivering both higher satisfaction and higher value for money than traditional taxi services.

Shift towards online bookings

Though majority of taxi users are booking taxis through dispatch, the likelihood of using online booking systems among potential taxi users is on the rise.

Consumers are in need of education

Consumers are not aware of who they should contact when they have a complaint about a vehicle-for-hire service. Very few Calgarians are aware that they should make the complaint to the City.

Safety of TNCs is of critical importance

While most passengers feel equally safe when taking a taxi or using a TNC, for the later, perceptions of safety are significantly more important drivers of satisfaction.

Detailed Analysis

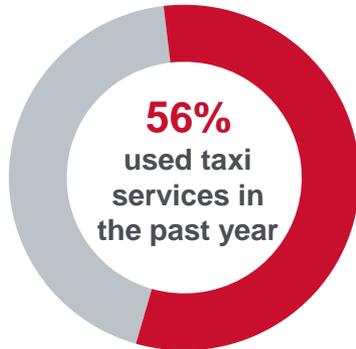


Usage



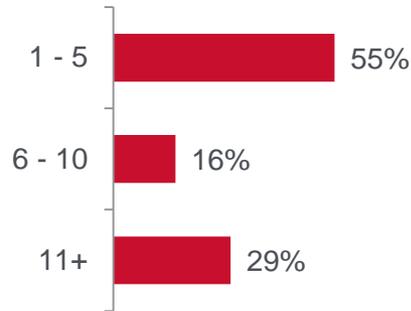
Taxi Usage (Past Year)

Taxi Usage - Past Year -



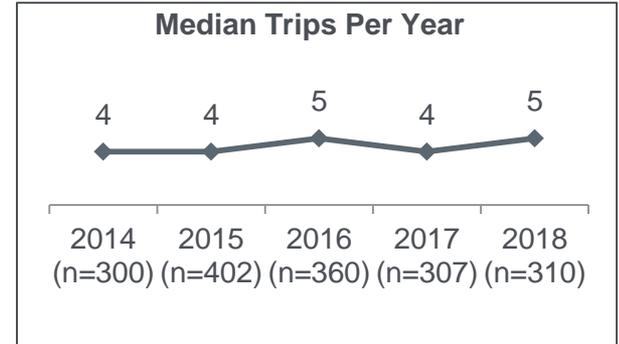
Base: Calgarians (n=587)

Trips Over the Past Year



Base: Taxi users (n=310)

Median Trips Per Year



Base: Taxi users

- More than half (56%) of Calgarians have used taxi services within the past year, consistent with 2017.
- Users have taken 5 trips per year (median), consistent with previous years.
- Calgarians who used taxi services within the past year are more likely to be:
 - 18-54 years old
 - Those who live in downtown Calgary
 - Those who do not own a vehicle
 - Those with a household income of more than \$100,000

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

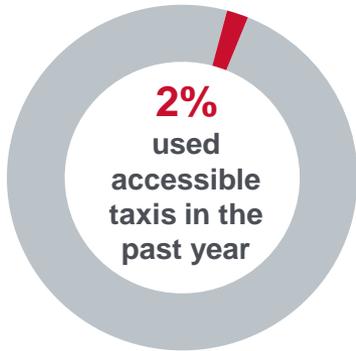
Before we begin, when I use the term 'taxi' services, please refer only to taxis and not to sedans or limousine services.

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



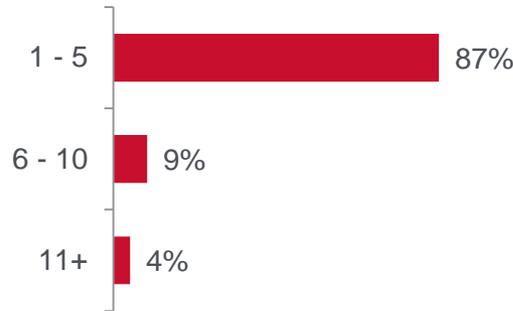
Wheelchair on-demand Accessible Taxi Usage (Past Year)

Accessible Taxi Usage - Past Year -



Base: Calgaryans (n=587)

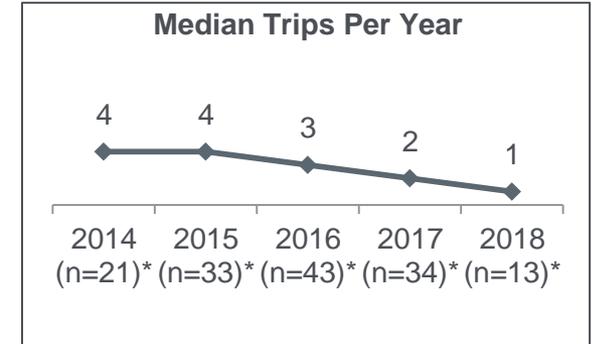
Trips Over the Past Year



**Small sample, interpret with caution*

Base: Accessible taxi users (n=13)*

Median Trips Per Year



**Small sample, interpret with caution*

Base: Accessible taxi users

- A total of 2% of Calgaryans have used wheelchair on-demand accessible taxi services within the past year, a **decrease** since 2017.
- Those using accessible taxi services have taken 1 trip per year (median), trending downward since 2015. (**caution: small sample**).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

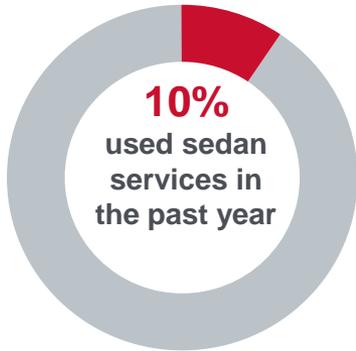
Q3. Within the **past year**, approximately how many times have you used each of the following types of services in Calgary? Wheelchair on-demand Accessible taxi services for the accommodation of a mobility device

Change in wording in 2018 from "Accessible taxi services for the accommodation of a mobility device" to "Wheelchair on-demand Accessible taxi services for the accommodation of a mobility device"



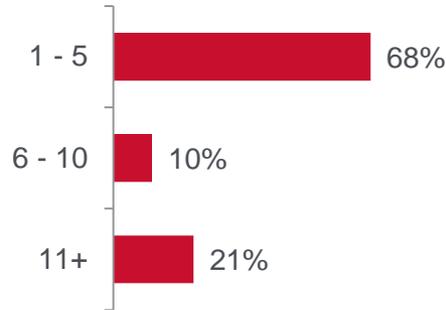
Sedan Usage (Past Year)

Sedan Usage - Past Year -



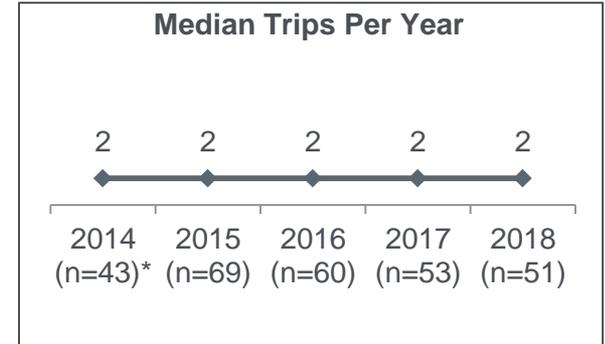
Base: Calgaryans (n=587)

Trips Over the Past Year



Base: Sedan users (n=51)

Median Trips Per Year



**Small sample, interpret with caution*

Base: Sedan users

- A total of 10% of Calgaryans have used sedan services within the past year, consistent with 2017.
- Those using sedan services have taken 2 trips per year (median), consistent with previous years.
- Calgaryans who used sedan services within the past year are more likely to be :
 - 35-54 years old
 - Those who live in SW Calgary

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

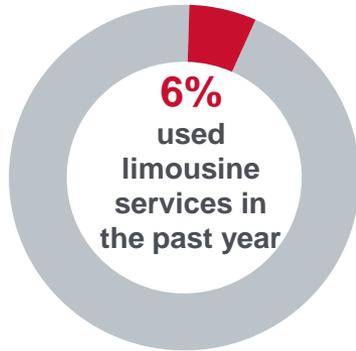
Before we begin, when I use the term 'taxi' services, please refer only to taxis and not to sedans or limousine services.

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



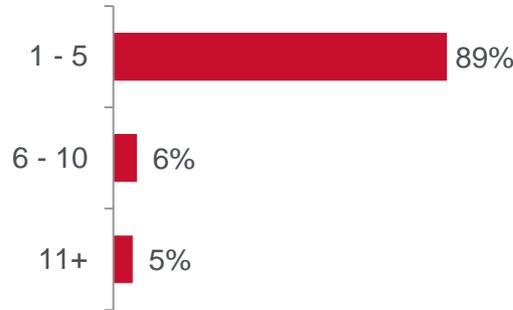
Limousine Usage (Past Year)

Limousine Usage - Past Year -



Base: Calgarians (n=587)

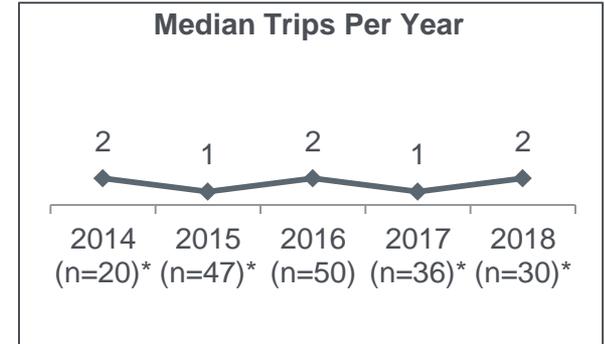
Trips Over the Past Year



**Small sample, interpret with caution*

Base: Limousine users (n=30)*

Median Trips Per Year



**Small sample, interpret with caution*

Base: Limousine users

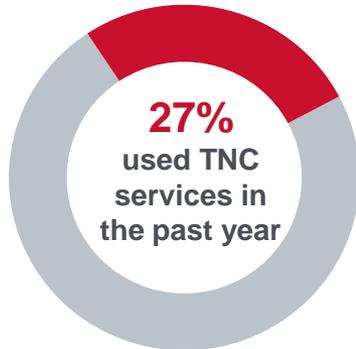
- A total of 6% of Calgarians have used limousine services within the past year.
- Those using limousine services have taken 2 trip per year (median), compared to 1 trip per year (median) in 2017. **(caution: small sample).**
- Calgarians who used limousine services within the past year are more likely to be :
 - Males
 - 18-34 years old
 - Those with a household income of more than \$100,000

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 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? Limousine services



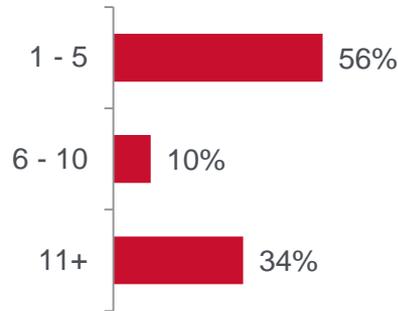
TNC Usage (Past Year)

TNC Usage - Past Year -



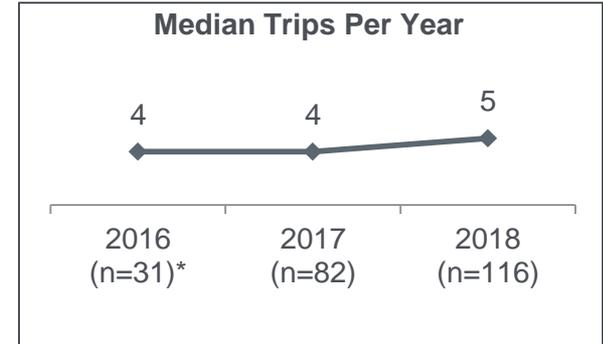
Base: Calgaryans (n=587)

Trips Over the Past Year



Base: TNC users (n=116)

Median Trips Per Year



**Small sample, interpret with caution*

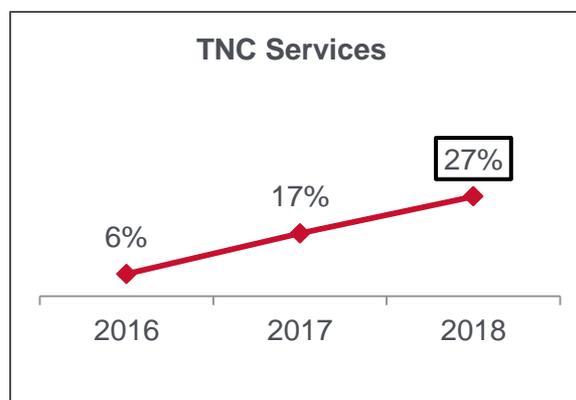
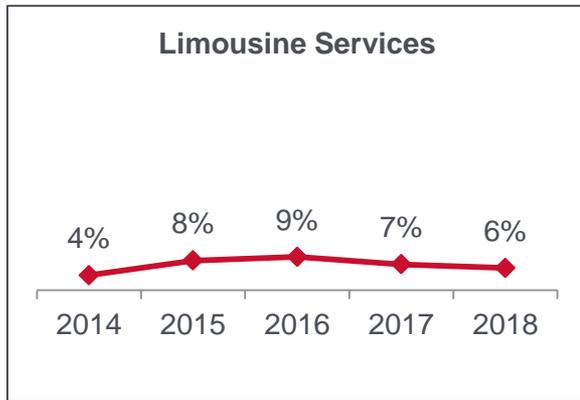
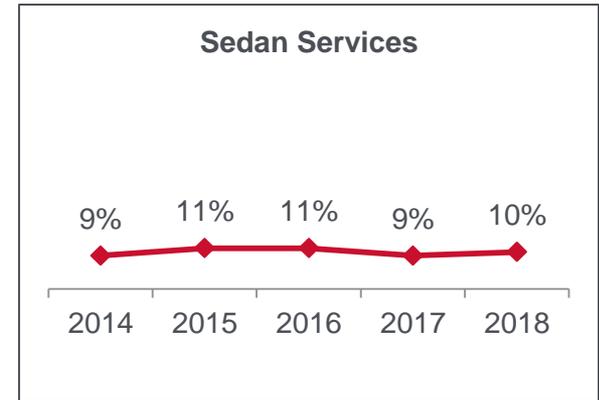
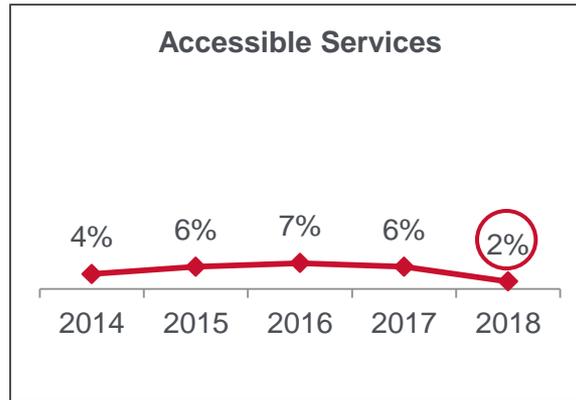
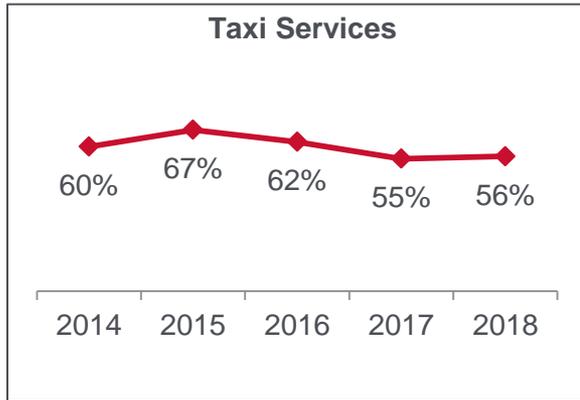
Base: TNC users

- More than one-quarter (27%) Calgaryans have used TNC services within the past year, an **increase** from 17% in 2017. The usage is forming an upward trend since 2016 (6% in 2016, 17% in 2017, 27% in 2018).
- Those using TNC services have taken 5 trips per year (median).
- Calgaryans who used TNC services within the past year are more likely to be :
 - Males
 - 18-54 years of age
 - With a household income of more than \$100,000

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 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? TNC services



Past Usage of Taxi Services (Trends Over Time)



- Usage of accessible taxi services has decreased and that of TNC services has increased in 2018.
- Usage of taxi, sedans and limousines are consistent with 2017.

 indicates significant increase since 2017
 indicates significant decrease since 2017

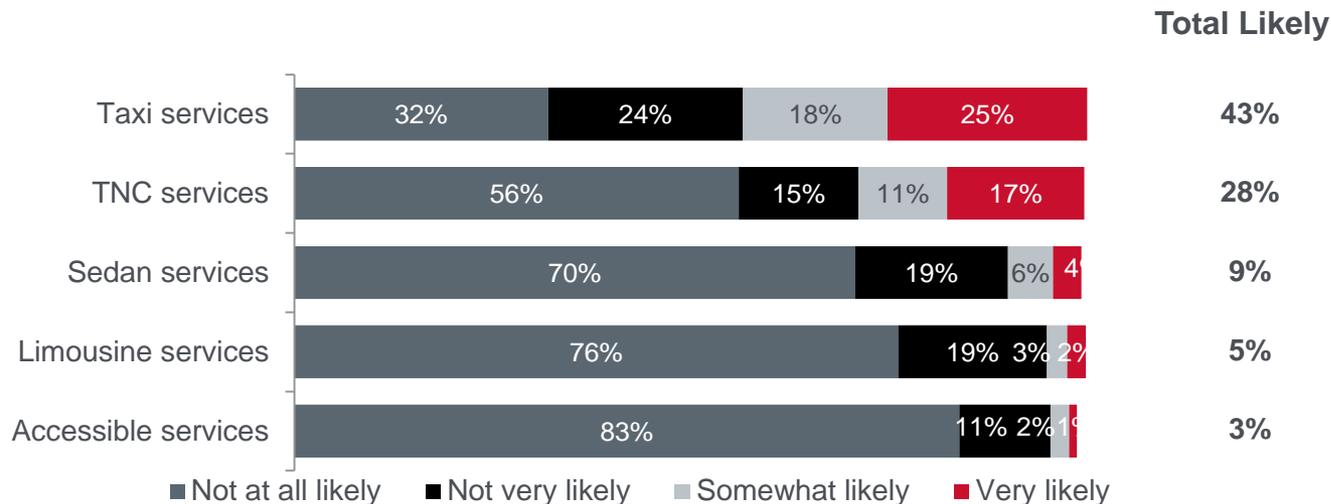
In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (2018, n=587; 2017, n=583; 2016, n=600; 2015, n=600; 2014, n=500).

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



Projected Usage of Taxi Services



- Two-in-five (43%) of Calgarians are likely to use taxi services and more than one-quarter (28%) are likely to use TNC services in the next 12 months.
- In the next 12 months, taxi services are more likely to be used by Calgarians who do not have a vehicle of their own.
- In the next 12 months, TNC services are more likely to be used by Calgarians:
 - 18-54 years old
 - Who have a vehicle of their own
 - Who have an annual household income of more than \$100,000
 - Who have used a TNC in the past year on the weekends
 - Who indicate that they would complain to the company if they had to make a complaint for a vehicle for hire.

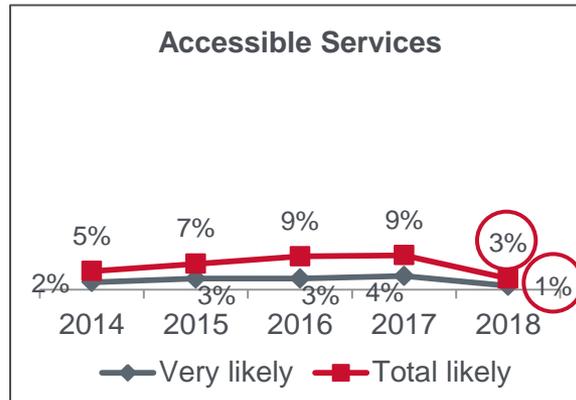
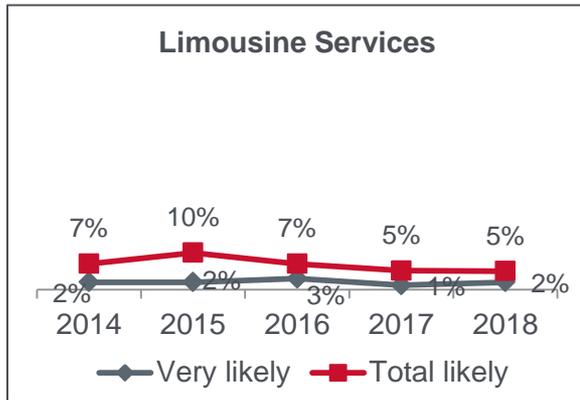
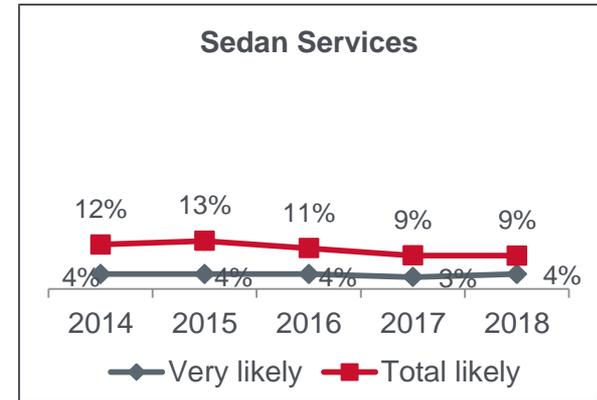
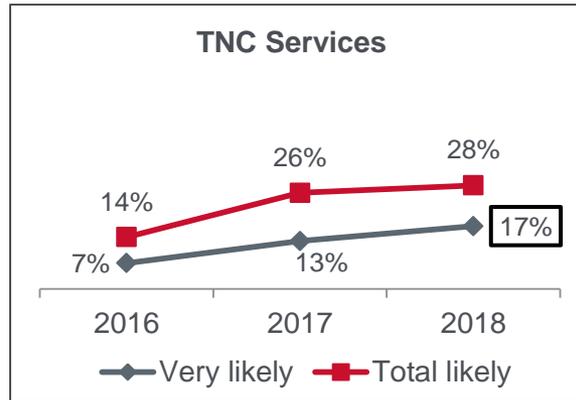
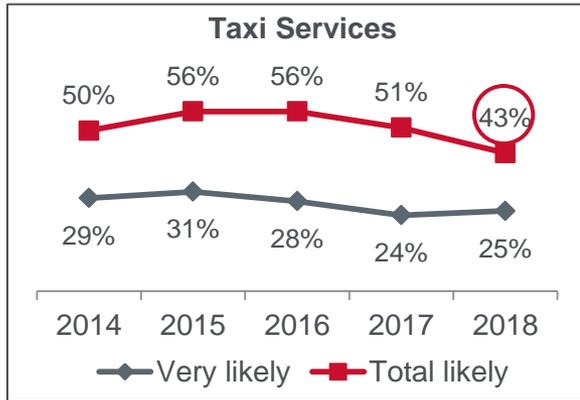
In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (2018, n=587). Don't know responses are not shown.

Q8. Over **the next 12 months**, how likely will you be to use each of the following types of services in Calgary? Change in wording in 2018 from "Accessible taxi services for the accommodation of a mobility device" to "Wheelchair on-demand Accessible taxi services for the accommodation of a mobility device"



Projected Usage of Taxi Services (Trends Over Time)



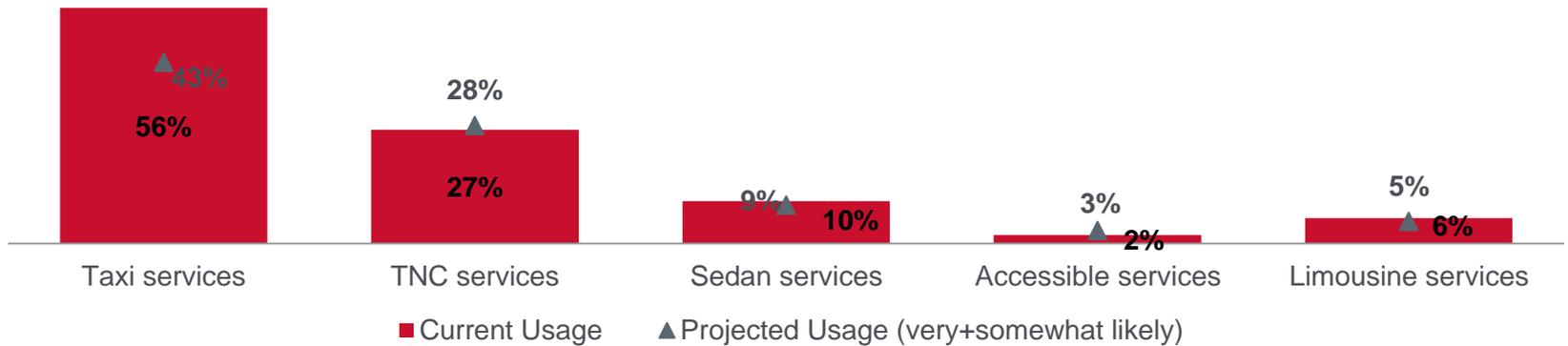
- Compared to 2017, projected use of taxi services has decreased. Likelihood of taxi usage is forming a downward trend since 2016.
- Projected usage of accessible taxi services has decreased in 2018
- Very likely ratings of using TNC services over the next 12 months is significantly higher in 2018.
- Projected usage of accessible services has decreased in 2018

 indicates significant increase since 2017
 indicates significant decrease since 2017

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: All Calgarians (2018, n=587; 2017, n=583; 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?



Current vs. Projected Usage of Taxi Services (2018)



- Two-in-five (43%) Calgarians are likely to use taxi services within the next 12 months, lower than the current usage level (56%). The gap between current and projected usage (56%:43%) of taxi services has widened than last year (55%:51%).
- The current and projected usage for other vehicles for hire services is fairly constant.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (n=587)

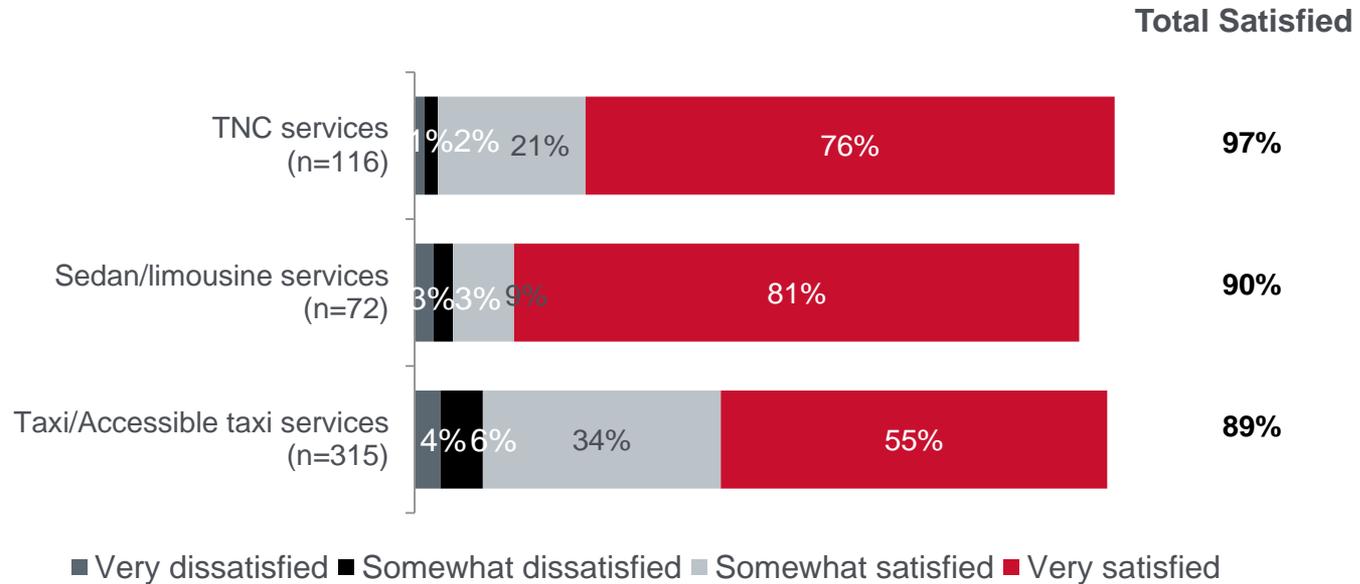
Q3 - Within the past year, approximately how many times have you used each of the following types of services in Calgary? / Q8. Over **the next 12 months**, how likely will you be to use each of the following types of services in Calgary?



Overall Satisfaction with Services



Overall Satisfaction with Services



- Satisfaction is strong for all types of “for hire” transportation services.
- Almost all (97%) of users of TNC services are satisfied with the services, including three-quarters (76%) who are very satisfied.
- A high majority of sedan/limousine customers (90%), and taxi/accessible taxi customers (89%) are satisfied with their experiences over the past year.
- Satisfaction for taxi/accessible services are higher among 55+ years old Calgarians, those who do not have a vehicle, have a household income of less than \$60,000, those who used the taxi in the morning in the past year

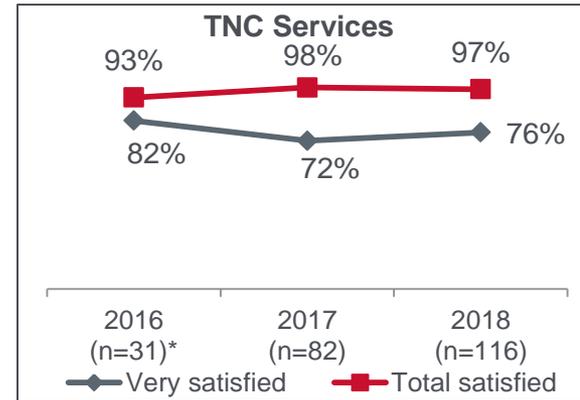
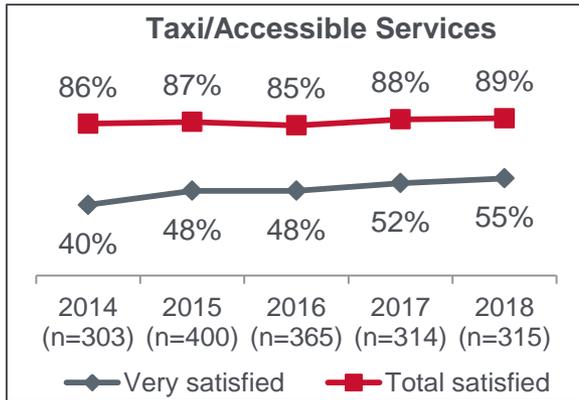
In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Users of respective vehicle-for-hire. Don't know responses are not shown.

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



Overall Satisfaction with Services (Trends Over Time)



- Satisfaction ratings are consistent with 2017.
- Strong satisfaction with taxi/accessible taxi services is trending up since 2016.

****Small sample, interpret with caution***

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: Users of respective vehicle-for-hire.

Tracking for sedan/limousines is not available as they were asked separately prior to 2018

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



Results

- While the driver and the riding experience are key factors for both taxi and TNC service, safety during the ride prevails for TNCs. It is interesting to note that the value for money count less than the overall riding experience (safety, driver,...).
- Satisfaction with the taxi driver are led by their courtesy and their driving manner. For TNC services, the ease of communication is key in the overall satisfaction. Professional appearance seems to matter only to a lesser extent.
- Satisfaction during the ride is driven mainly by the cleanliness of the vehicle for taxi service. While amenities and music matter only to a lesser extent for taxi services, it is key for TNC services.

Methodology

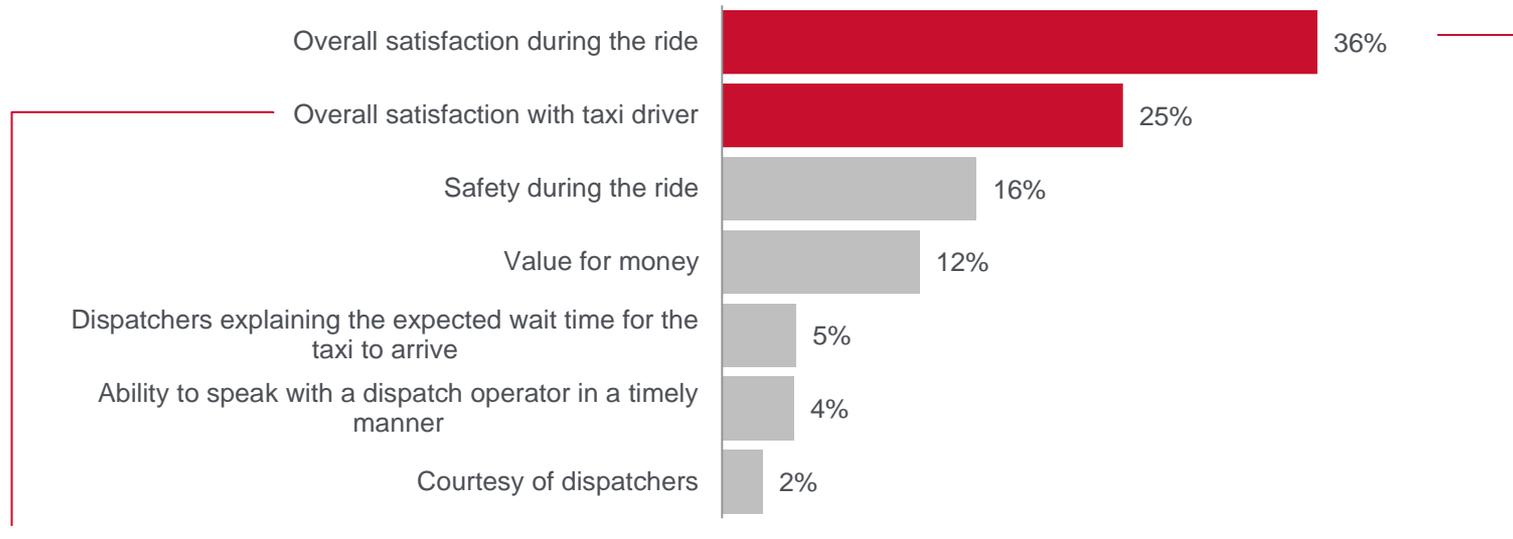
The key driver analysis has been performed using a Shapley-Value Regression, which takes into account (i) the causal relationship between the variables and (ii) the multicollinearity issues.

Multicollinearity arises when variables are highly correlated among them. This means that the same underlying information is captured several time by different variables, which inflate the importance of the underlying dimension if the issue is not treated.

The analysis presents the relative contribution of each of the drivers on the overall satisfaction.



Key Drivers of Satisfaction with Taxi Services



Overall Satisfaction with taxi drivers Importance

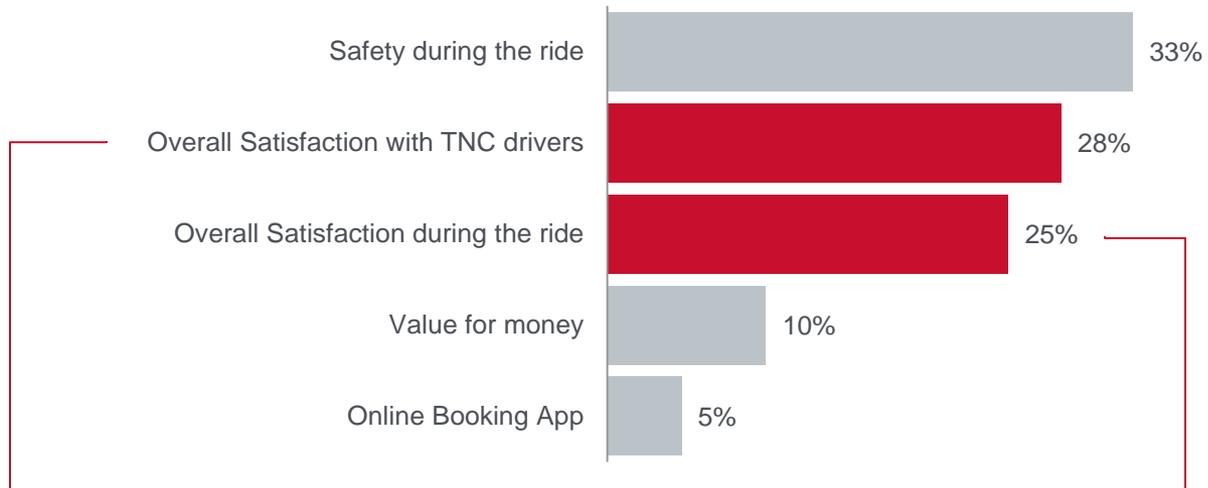
The courtesy of the drivers	27%
Driving in a safe manner which adheres to driving laws	21%
The ease of communications with drivers	18%
The driver taking the most economical route to your destination	13%
The drivers' knowledge of the city's communities, landmarks and roads	12%
The professional appearance of the drivers	5%
The helpfulness of the driver with any assistance required, such as assistance with your bags	3%

Overall Satisfaction during the ride Importance

The cleanliness of the vehicle	58%
The condition and maintenance of the vehicle	19%
The amount of time it took for the taxi to arrive	15%
Amenities within the vehicle [Kleenex, newspapers, etc.]	4%
The music and or radio station being played during the ride	4%



Key Drivers of Satisfaction with TNCs



Overall Satisfaction with TNC drivers

Overall Satisfaction with TNC drivers	Importance
The ease of communications with drivers	22%
The courtesy of the drivers	20%
The helpfulness of the driver with any assistance required, such as assistance with your bags	18%
The driver taking the most economical route to your destination	17%
Driving in a safe manner which adheres to driving laws	9%
The drivers' knowledge of the city's communities, landmarks and roads	9%
The professional appearance of the drivers	6%

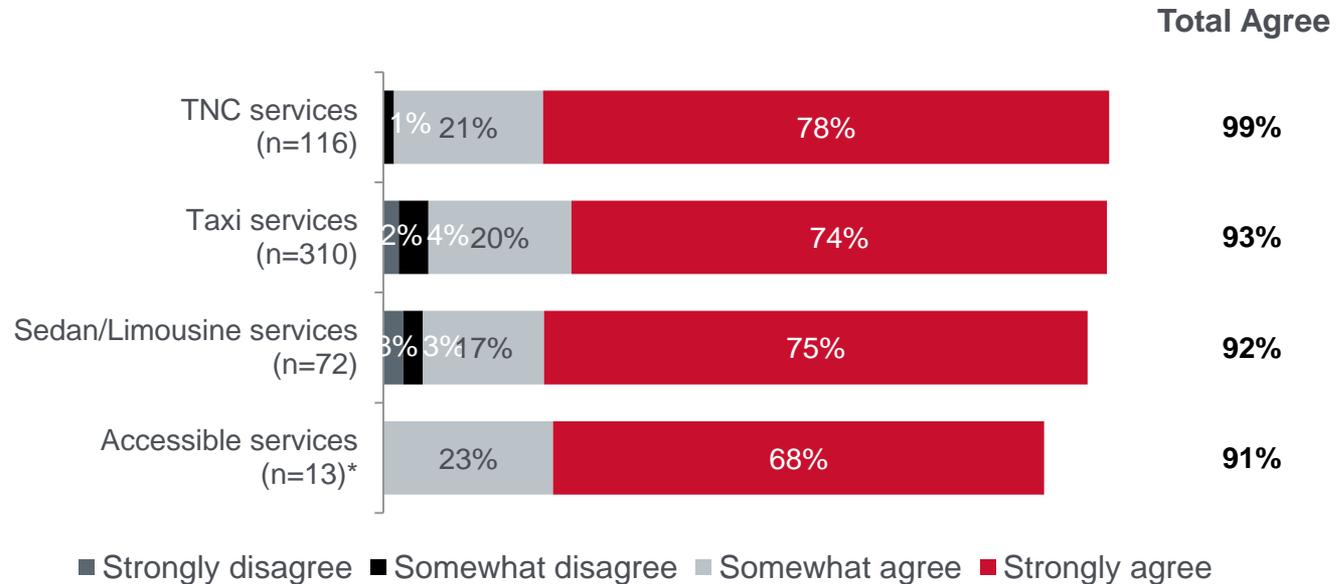
Overall Satisfaction during the ride

Overall Satisfaction during the ride	Importance
The cleanliness of the vehicle	32%
The music and or radio station being played during the ride	27%
Amenities within the vehicle [Kleenex, newspapers, etc.]	22%
The condition and maintenance of the vehicle	19%

Safety



Safety During the Ride



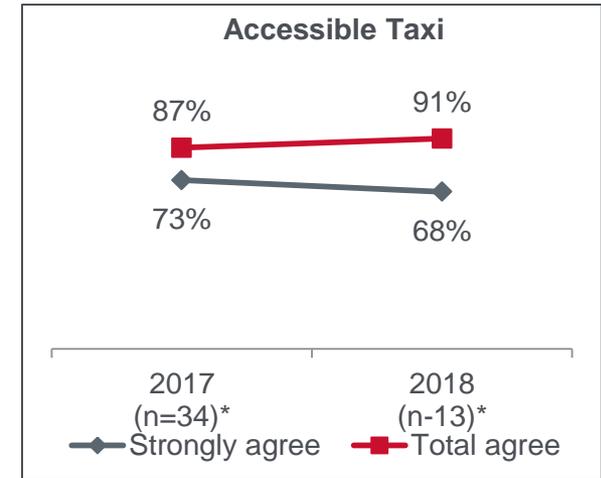
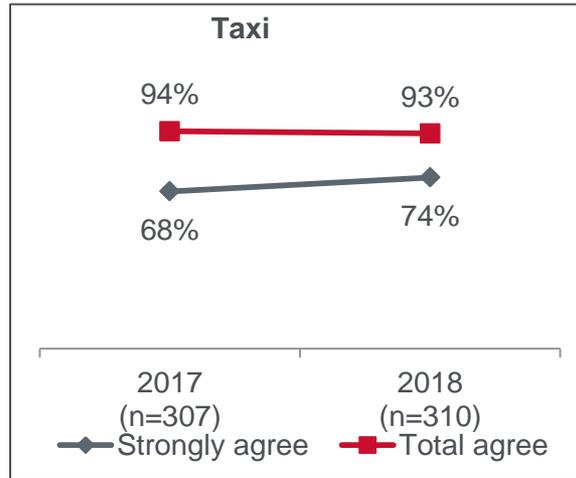
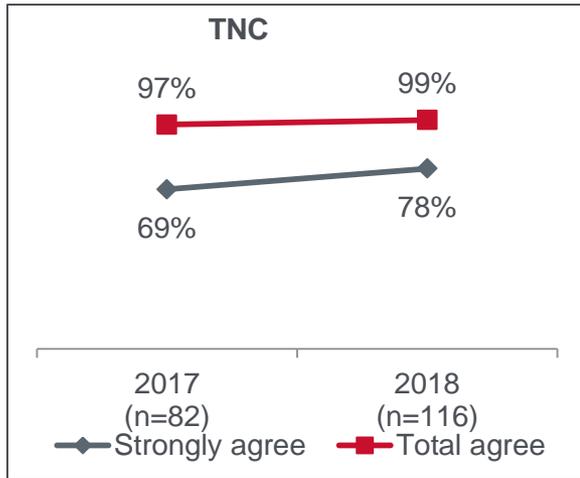
****Small sample, interpret with caution***

- The majority of users of vehicle-for-hire services agree that they felt safe during their last ride.
- The strength of agreement is also high (range of 68% to 78%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: Users of respective vehicle-for-hire services. Don't know responses are not shown.
 Q22A. To what extent do you agree or disagree that you felt completely safe during your last ride in:
 New question in 2017



Safety During the Ride (Trends Over Time)



- Safety ratings are consistent with 2017.

****Small sample, interpret with caution***

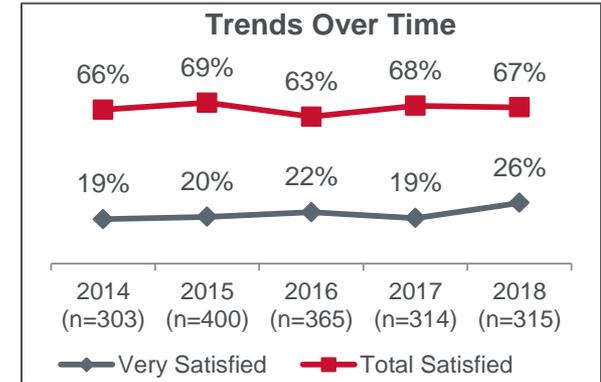
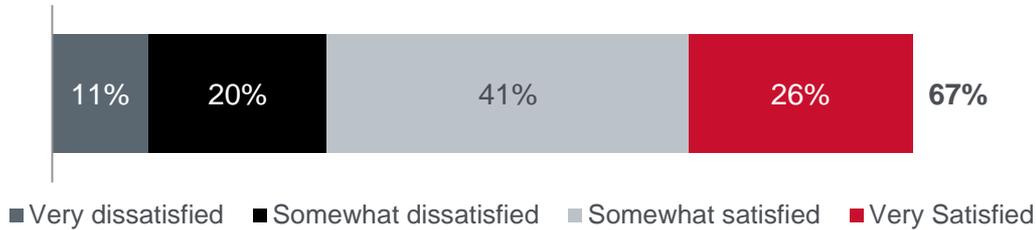
In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Tracking for sedan/limousines is not available as they were asked separately prior to 2018
 Base: Users of respective vehicle-for-hire services. Don't know responses are not shown.
 Q22A. To what extent do you agree or disagree that you felt completely safe during your last ride in:
 New question in 2017

Payment and Value

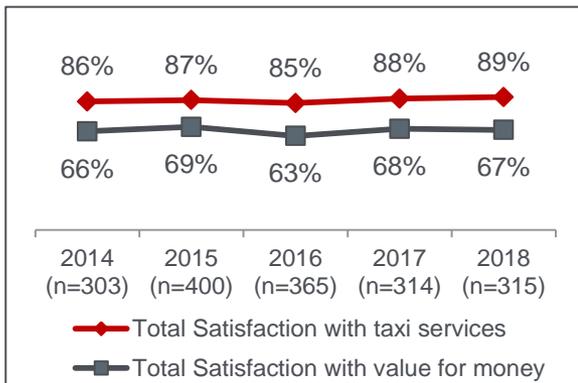


Satisfaction with Value for Money with Taxi Services

Overall Satisfaction with value for money



Value for money vs. satisfaction



- Two-thirds (67%) of taxi users are satisfied with the value for money they received from their taxi rides this past year, consistent with 2017.
- 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, consistent with previous years.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

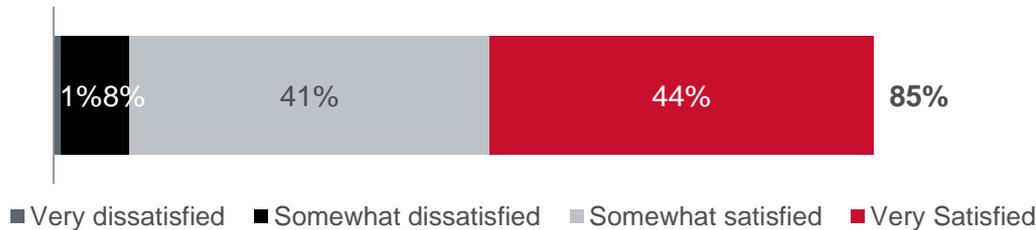
Base: Calgaryans who have used taxi services or accessible taxi services within the past year (n=315) / Don't know responses are not shown

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?

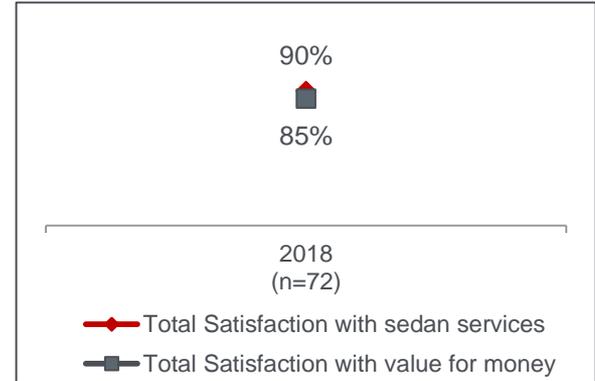


Satisfaction with Value for Money with Sedans/Limousines

Overall Satisfaction with value for money



Value for money vs. satisfaction



- More than four-in-five (85%) sedan/limousine users are satisfied with the value for money that they received.
- The intensity of satisfaction with value for money for sedan/limousine rides is comparable.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgarians who have used sedan services within the past year (n=72) / Don't know responses are not shown

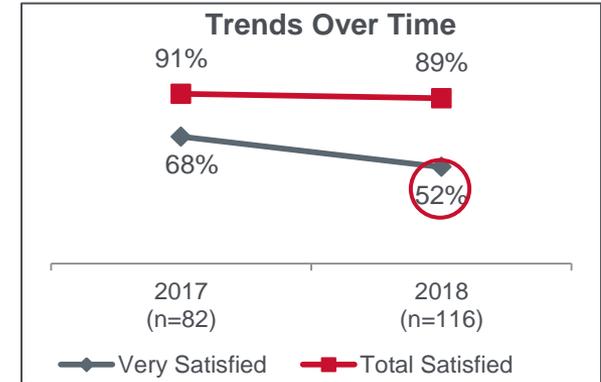
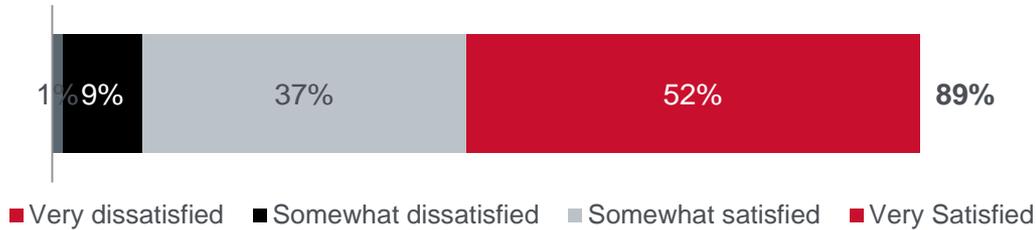
Tracking for sedan/limousines is not available as they were asked separately prior to 2018

Q29. Thinking of the price you paid for the sedan/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? Q24. Overall, how satisfied or dissatisfied are you with the sedan/limousine services you received in Calgary over the past year?

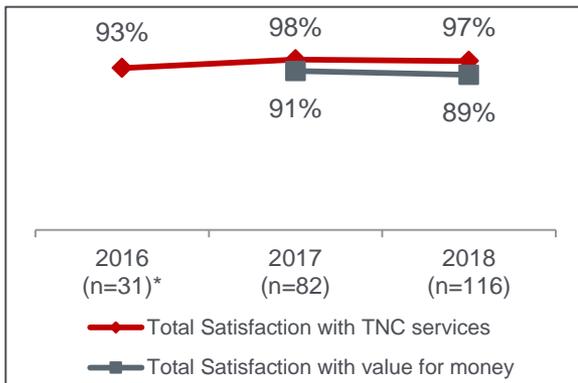


Satisfaction with Value for Money with TNC Services

Overall Satisfaction with value for money



Value for money vs. satisfaction



- Nine-in-ten (89%) TNC users are satisfied with the value for money that they received. Very satisfied ratings has decreased in 2018.
- The intensity of satisfaction with value for money is identical to overall satisfaction with TNC services.

□ indicates significant increase since 2017
○ indicates significant decrease since 2017

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: Calgarians who have used TNC services within the past year (n=116) / Don't know responses are not shown
 Q30A. Thinking of the price you paid for the TNC 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? Q25a. Overall, how satisfied or dissatisfied are you with the TNC services you received in Calgary over the past year?
 New question in 2017

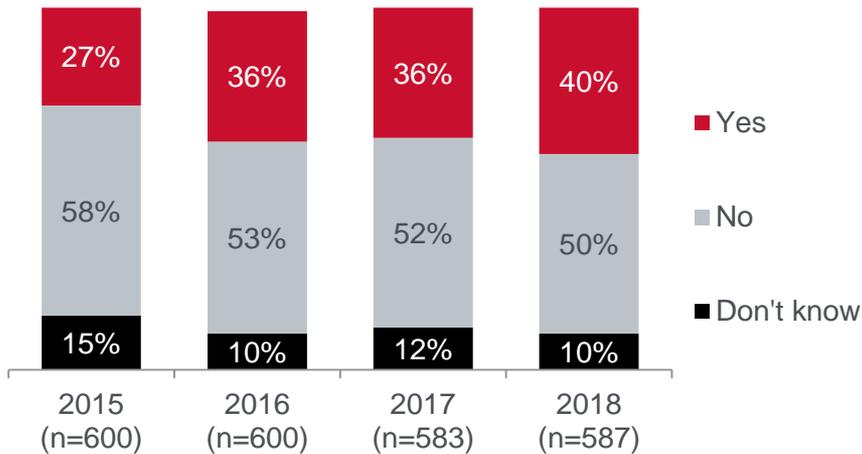
****Small sample, interpret with caution***

Compliments & Complaints



Bumper Sticker Awareness

Recall Seeing Bumper Sticker?



Base: All Calgarians

- Following the mandatory implementation of displaying bumper stickers regarding compliments and complaints about taxi services, 40% of the general public recall having seen the bumper stickers (consistent with 2017).

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

	2015 (n=160)	2016 (n=209)	2017 (n=194)	2018 (n=221)
The taxi company	16%	21%	23%	22%
311 (City of Calgary)	34%	17%	17%	16%
There was a number to call	2%	14%	6%	15%
Taxi Commission/ Livery Board*	-	-	-	1%
Other	1%	1%	2%	1%
Don't know / Refused	48%	46%	53%	49%

Base: Calgarians aware of bumper sticker

- One-in-six (16%) of those who recall the bumper sticker correctly indicate that it informed people to contact The City of Calgary via 311 – similar to 2017.
- 22% incorrectly report that the bumper sticker informed people to call the taxi company.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

*New code added in 2018

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

◻ indicates significant increase since 2017
 ◯ indicates significant decrease since 2017



Complaints

If you had a complaint, to whom will you make the complaint?

Complaint about...	Taxi or accessible taxi	Sedan/Limousine	TNC
To the taxi company directly	59%	47%	41%
To The City of Calgary / 3-1-1 / Taxi Commission' / Livery Transport Services	17%	7%	7%
Taxi dispatcher	8%	4%	2%
The app	-	-	8%
To the driver	2%	4%	5%
Google / Internet search	1%	3%	3%
The police	1%	-	1%
Other	1%	1%	1%
None / Nothing	1%	4%	5%
Don't know / Can't remember	16%	34%	32%

- One-in-six (17%) Calgarians indicate that they will make the complaint about taxis to the City, and three-in-five (59%) indicate that they will complaint to the taxi company directly.
- More than two-in-five Calgarians indicate that they will make a complaint about sedan/limousine or TNC to the company directly.
- Very few (7%) Calgarians indicate that they will make the complaint about sedan/limousine or TNC to the City.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (n=587)

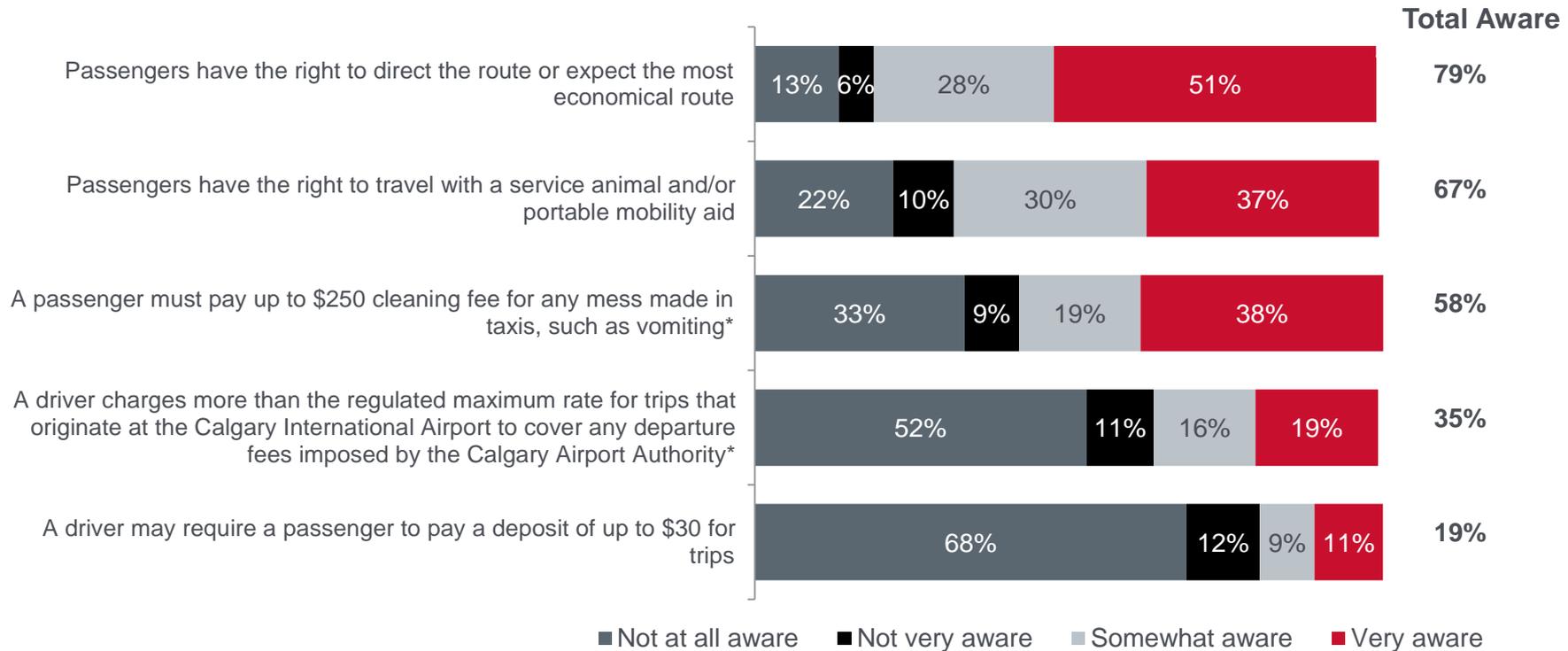
New question in 2018

Q38. If you had a complaint, to whom will you make the complaint for:

Awareness of Rights



Awareness of Rights



- The majority of Calgarians are aware that passengers have the right to direct the route or expect the most economical route (79%) and to travel with a service animal and/or portable mobility aid (67%).
- More than half (58%) of Calgarians are aware that a passenger must pay up to \$250 cleaning fee for any mess made in a taxi.
- A considerably lower proportion of Calgarians are aware that drivers charges airport departure fees (35%) and that a driver may require a passenger to pay a deposit of up to \$30 for trips (19%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (n=587)/ Don't know responses are not shown

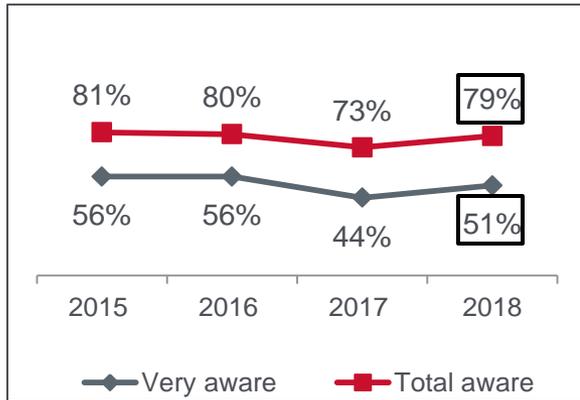
*Slight change in wording in 2018

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

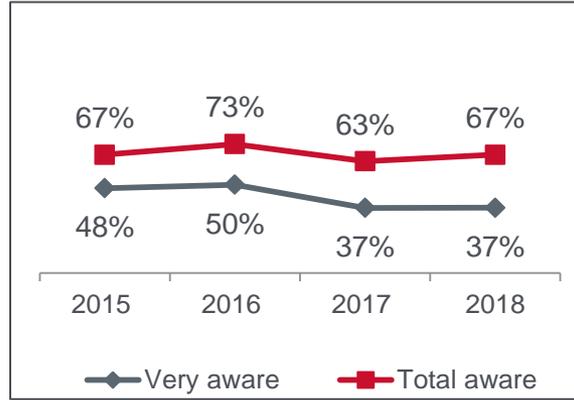


Awareness of Rights (Trends Over Time)

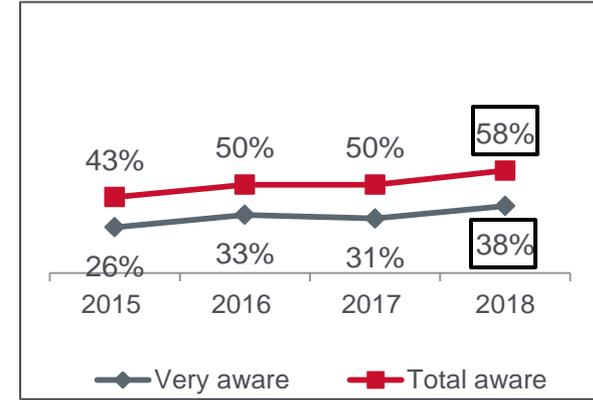
Passengers have the right to direct the route or expect the most economical route



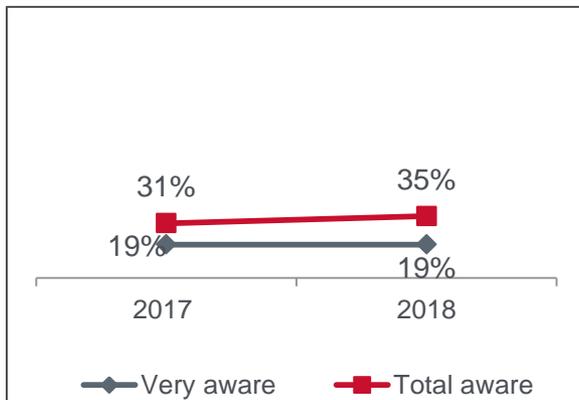
Passengers have the right to travel with a service animal and/or portable mobility aid



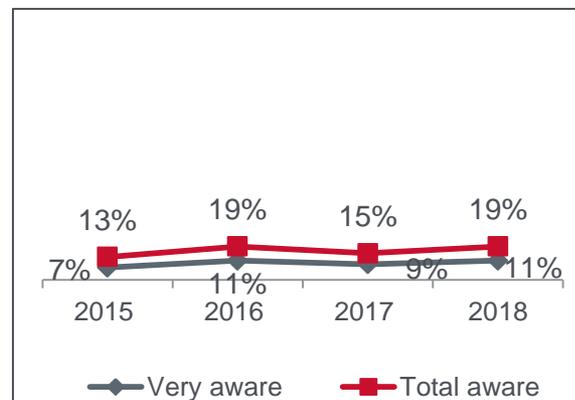
A passenger must pay up to \$250 cleaning fee for any mess made in taxis, such as vomiting*



Drivers charges airport departure fees*



A driver may require a passenger to pay a deposit of up to \$30 for trips



➤ Awareness that passengers have the right to direct the most economical route, and that a passenger must pay up to \$250 cleaning fee has increased since 2017.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (2018, n=587; 2017, n=583; 2016, n=600; 2015, n=600)

*Slight change in wording in 2018

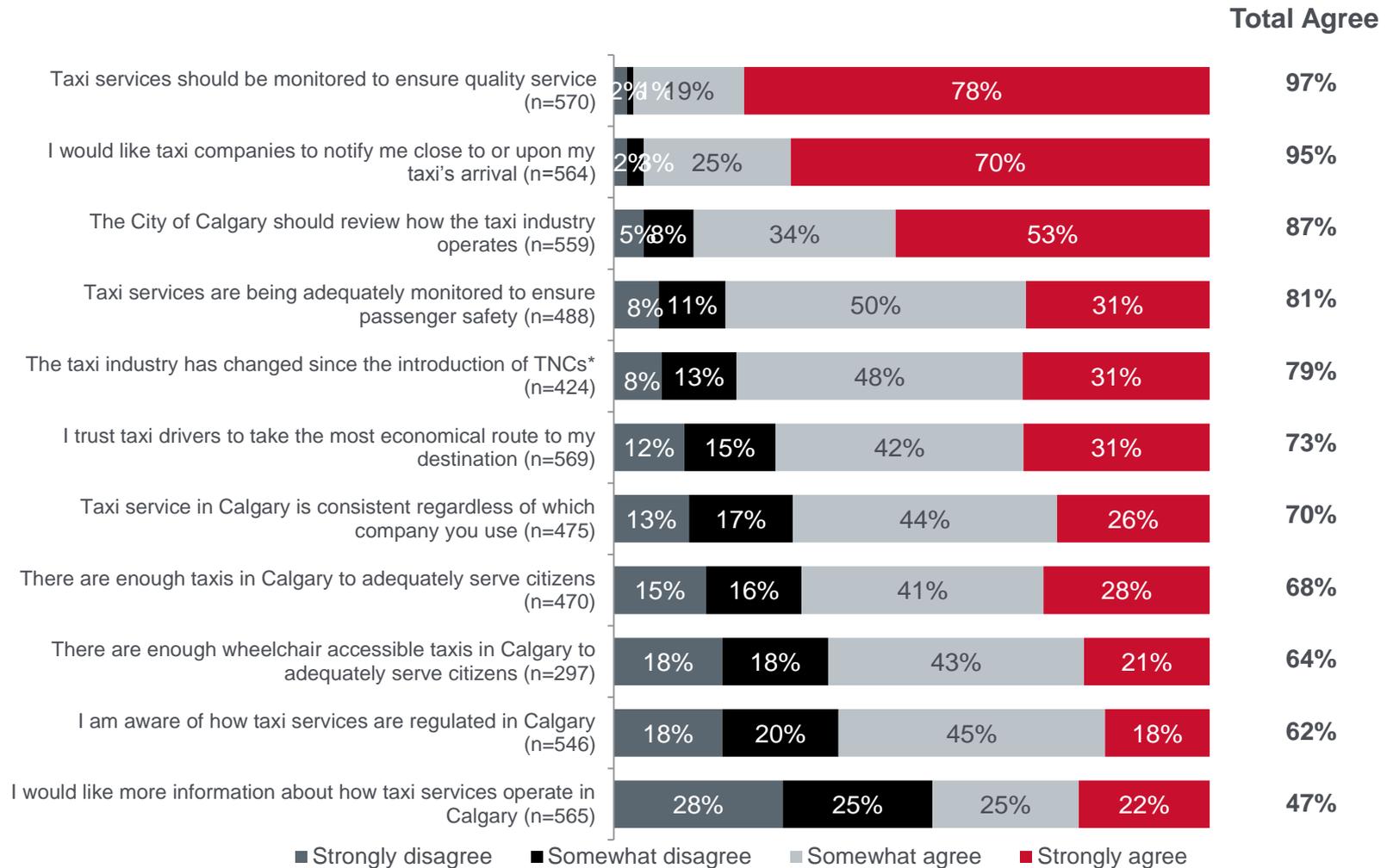
Q40 - To what extent are you aware of each of the following rights that passengers have while using taxi services in Calgary?

◻ indicates significant increase since 2017
 ○ indicates significant decrease since 2017

Attitudes



Attitudes Towards Taxi Services in Calgary



In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (excluding don't know and N/A responses)

*New in 2018

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.



Attitudes Towards Taxi Services in Calgary (Trends Over Time)

Total Agree	2014	2015	2016	2017	2018
Taxi services should be monitored to ensure quality service	-	-	-	98%	97%
I would like taxi companies to notify me close to or upon my taxi's arrival	90%	94%	94%	95%	95%
The City of Calgary should review how the taxi industry operates	89%	90%	89%	89%	87%
Taxi services are being adequately monitored to ensure passenger safety	-	-	-	83%	81%
The taxi industry has changed since the introduction of TNCs*	-	-	-	-	79%
I trust taxi drivers to take the most economical route to my destination	74%	80%	76%	79%	73%
Taxi service in Calgary is consistent regardless of which company you use	67%	71%	68%	74%	70%
There are enough taxis in Calgary to adequately serve citizens	42%	45%	52%	60%	68%
There are enough wheelchair accessible taxis in Calgary to adequately serve citizens	-	-	-	67%	64%
I am aware of how taxi services are regulated in Calgary	53%	56%	60%	62%	62%
I would like more information about how taxi services operate in Calgary	39%	44%	50%	43%	47%

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (excluding don't know and N/A responses)

*New in 2018

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.

 indicates significant increase since 2017
 indicates significant decrease since 2017



Attitudes Towards Taxi Services in Calgary (Trends Over Time)

Strongly Agree	2014	2015	2016	2017	2018
Taxi services should be monitored to ensure quality service	-	-	-	78%	78%
I would like taxi companies to notify me close to or upon my taxi's arrival	61%	67%	68%	69%	70%
The City of Calgary should review how the taxi industry operates	54%	55%	61%	52%	53%
Taxi services are being adequately monitored to ensure passenger safety	-	-	-	35%	31%
The taxi industry has changed since the introduction of TNCs*					31%
I trust taxi drivers to take the most economical route to my destination	36%	39%	38%	35%	31%
Taxi service in Calgary is consistent regardless of which company you use	28%	27%	29%	28%	26%
There are enough taxis in Calgary to adequately serve citizens	17%	15%	22%	23%	28%
There are enough wheelchair accessible taxis in Calgary to adequately serve citizens	-	-	-	23%	21%
I am aware of how taxi services are regulated in Calgary	19%	17%	21%	19%	18%
I would like more information about how taxi services operate in Calgary	14%	15%	23%	15%	22%

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: All Calgaryans (excluding don't know and N/A responses)

*New in 2018

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.

◻ indicates significant increase since 2017
 ○ indicates significant decrease since 2017

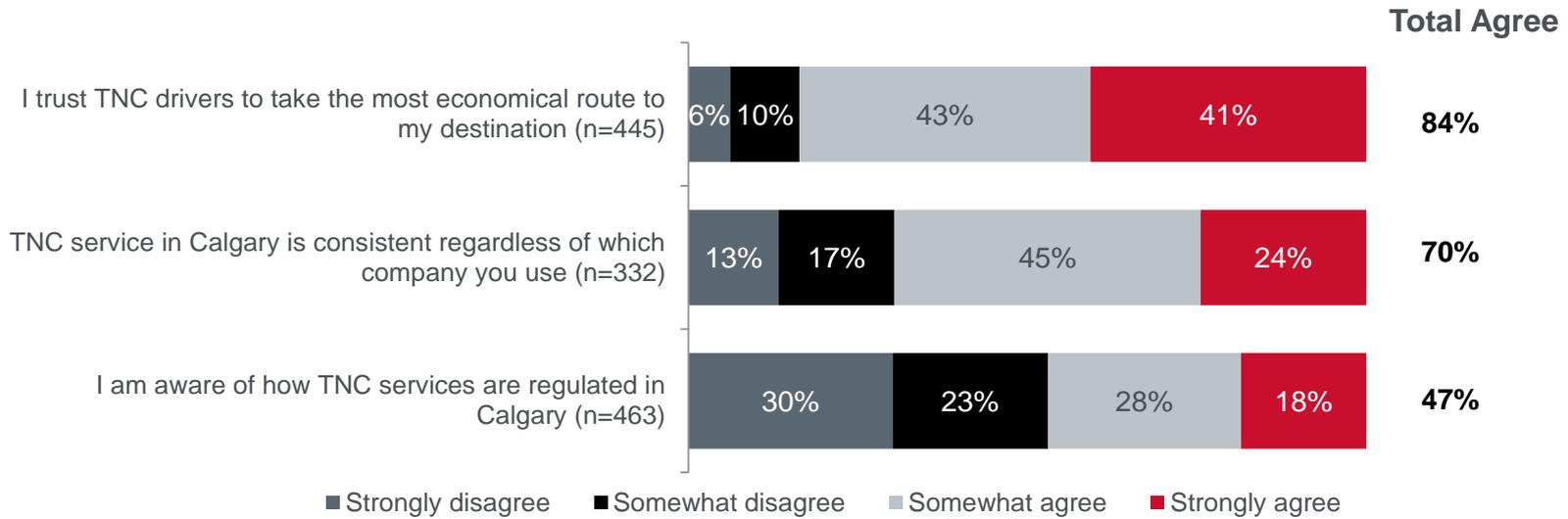


Attitudes Towards Taxi Services in Calgary

- Half or more (a range of 47% - 97%) agree with various statements regarding taxi services in Calgary.
- Calgarians are most likely to agree that taxi services should be monitored to ensure quality (97%).
- Nearly half (47%) of Calgarians would like more information about how taxi services operate in Calgary.
- Attitudes towards taxi services in Calgary remain consistent with 2017 with an increase in agreement that there are enough taxis in Calgary to adequately serve citizens.
- Trust in taxi drivers to take the most economical route to destination has decreased since 2017.



Attitudes Towards TNC Services in Calgary



- More than four-in-five (84%) Calgarians agree that they trust the TNC drivers to take the most economical route to their destination, including two-in-five (41%) who strongly agree.
- Seven-in-ten (70%) Calgarians also agree that TNC service is consistent regardless of the company used.
- Nearly half (47%) of Calgarians agree that they are aware of how TNC services are regulated in Calgary.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

Q411. I'm now going to read you a series of statements about TNC services in Calgary. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each one.



Attitudes Towards TNC Services in Calgary (Trends Over Time)

Total Agree	2017	2018
I trust TNC drivers to take the most economical route to my destination	81%	84%
TNC service in Calgary is consistent regardless of which company you use	71%	70%
I am aware of how TNC services are regulated in Calgary	42%	47%

Strongly Agree	2017	2018
I trust TNC drivers to take the most economical route to my destination	37%	41%
TNC service in Calgary is consistent regardless of which company you use	24%	24%
I am aware of how TNC services are regulated in Calgary	11%	18%

- Proportion of Calgarians that strongly agree that they are aware of how TNC services are regulated in Calgary has increased since 2017.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

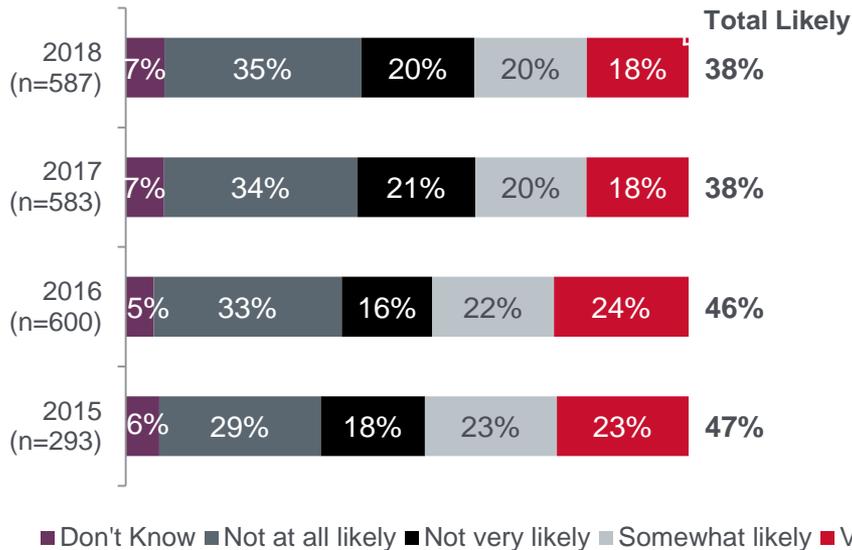
Q41I. I'm now going to read you a series of statements about TNC services in Calgary. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each one.

◻ indicates significant increase since 2017
 ○ indicates significant decrease since 2017



Likelihood to Bypass an Accessible Taxi

Likelihood to bypass an accessible taxi which accommodates mobility devices



Reasons for likelihood to bypass*

	2018 (n=212)
It's the right thing to do	24%
Thought they were for mobility needs people only	23%
Leave it for someone who needs it	21%
I don't need it	14%
Didn't know I could take an accessible taxi	5%
Comfort	4%
Too large/ don't need all that room	3%
More expensive	3%
Appearance of the driver	2%
Other	8%
Don't know / refused	10%

- Nearly two-in-five (38%) Calgarians are likely to bypass an available taxi and look for a different one if it was an accessible taxi, identical to 2017.
- Among those who are likely to bypass, top mentions for doing so are it's the right thing, thought it was only for mobility needs people, or left it for someone who needs it.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians

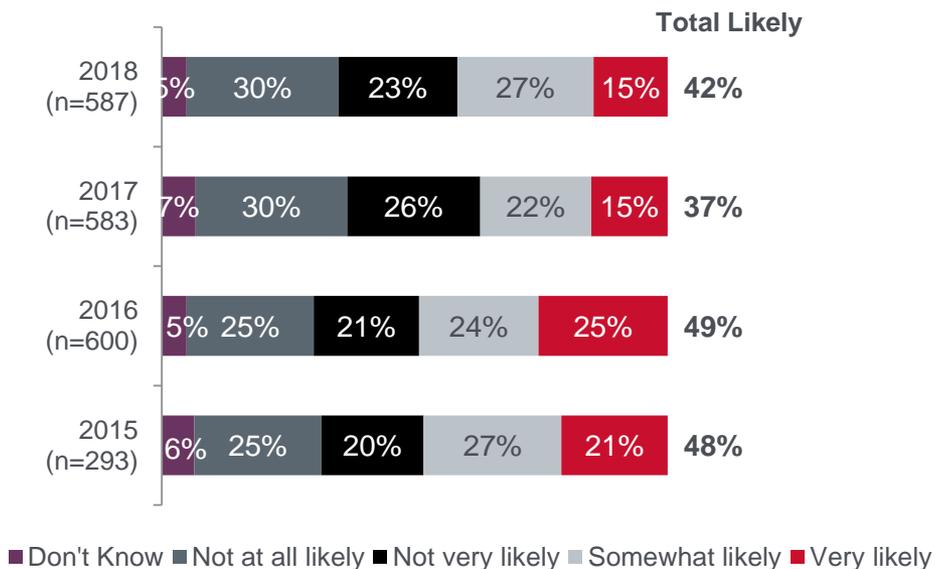
Q42. How likely would you be to bypass an available taxi and look for a different one if it was .. Q42c. Why are you likely to bypass an accessible taxi?

* Base: Those likely to bypass an accessible taxi/Multiple responses allowed



Likelihood to Bypass a Taxi Van

Likelihood to bypass a taxi van which seats more than 5 passengers



Reasons for likelihood to bypass*

	2018 (n=220)
If there were people around that needed it, I will bypass it	29%
I don't need it	11%
It's the right thing to do	9%
Too large/ Don't need all that room	9%
More expensive	8%
I would not bypass a taxi van	6%
Didn't know I could take a taxi van if travelling alone	6%
Comfort	5%
Depends on how many people are in it	4%
Don't like vans	2%
Prefer sedan	1%
Environmental concerns	<1%
Other	5%
Don't know / Refused	16%

- Two-in-five (42%) Calgarians are likely to bypass an available taxi and look for a different one if it was a taxi van, consistent with 2017.
- Among those who are likely to bypass, three-in-ten (29%) will bypass it if there was someone around them who needed it.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians

Q42. How likely would you be to bypass an available taxi and look for a different one if it was .. Q42d. Why are you likely to bypass a taxi van?

*Base: Those likely to bypass a taxi van/Multiple responses allowed

Taxi Services



Reasons for Not Using Taxi Services

- Multiple Responses Allowed -

Reasons for not using taxi	2014 (n=197)	2015 (n=200)	2016 (n=235)	2017 (n=269)	2018 (n=272)
I drive / I have my own car	64%	65%	66%	58%	55%
No need	30%	22%	20%	26%	23%
Too expensive	4%	5%	8%	9%	16%
Use public transportation instead	8%	13%	8%	15%	8%
Prefer to use Uber	-	-	-	2%	6%
Can get a lift with someone else	9%	12%	8%	4%	5%
Poor service*	-	-	-	1%	2%
Difficult to get a cab	5%	1%	2%	2%	2%
Don't show up on time	-	-	-	1%	1%
Drivers are rude/ impolite	-	-	1%	1%	1%
Other	-	6%	2%	2%	3%
Don't know / refused	-	-	-	1%	2%

- Among those who have not used taxi services this past year, 55% explain that they use their own vehicle instead, similar to last year.
- In addition, 23% of non-taxi users report that they do not require taxi services, 16% say fares are too expensive (an increase in 2018), 8% say that they use public transit instead (a decrease from 15% in 2017).
- Others explain that they have not used taxi services this past year because they prefer to use Uber (6%), and that they can lift with someone else (5%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 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?*

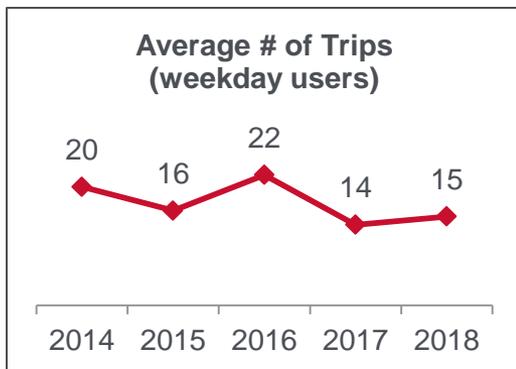
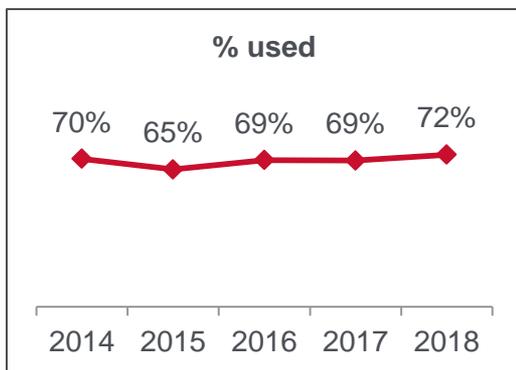
□ indicates significant increase since 2017
 ○ indicates significant decrease since 2017



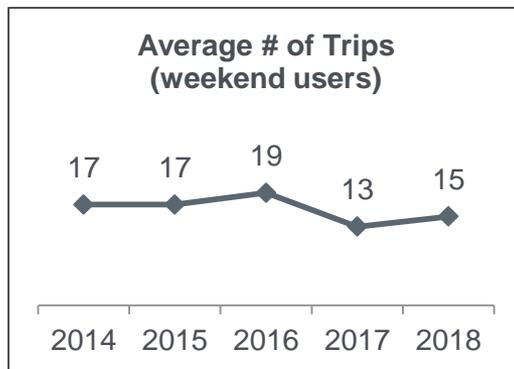
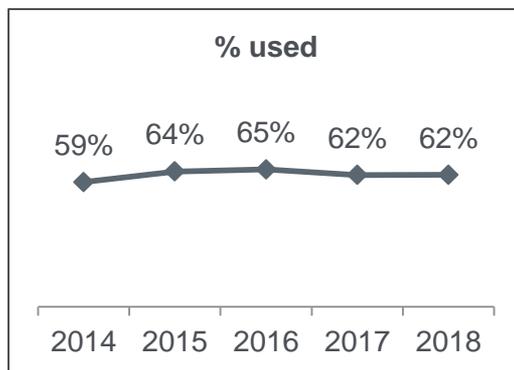
Taxi Usage by Days of the Week



WEEKDAY



WEEKEND



- Within the past year, nearly seven-in-ten taxi users accessed taxi services during weekdays (72%) and three-in-five used taxis during weekends (62%), consistent with 2017.
- Weekday taxi usage is more likely to occur among:
 - Older Calgarians (weekday usage increases with age)
 - Those who pre-book their taxi via dispatcher
- Weekend taxi usage is more likely to occur among:
 - 18-34 year olds
 - Those who use taxis for pleasure
 - Those who hail a taxi
 - Those who are dissatisfied with the overall experience of taxi services

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgarians who have used taxi services or accessible taxi services within the past year (2014, n=303; 2015, n=400; 2016, n=365; 2017, n=314; 2018, n=315)

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



WEEKDAY

- Multiple Responses Allowed -



WEEKEND

	2014 Weekdays (n=214)	2015 Weekdays (n=268)	2016 Weekdays (n=256)	2017 Weekdays (n=223)	2018 Weekdays (n=235)
Morning	43%	50%	47%	38%	56%
Afternoon	28%	31%	37%	33%	45%
Evening	39%	40%	42%	39%	42%
Late night	44%	42%	46%	43%	29%
Don't know	1%	2%	1%	4%	1%

➤ **Weekday** taxi usage has increased in the mornings and afternoons; and decreased for the late nights.

➤ **Weekend** usage peaks during the late night (61%). Weekend usage has increased in afternoons and evenings; and has decreased for the late nights.

	2014 Weekend (n=178)	2015 Weekend (n=249)	2016 Weekend (n=228)	2017 Weekend (n=191)	2018 Weekend (n=178)
Morning	21%	16%	21%	20%	26%
Afternoon	16%	18%	17%	15%	26%
Evening	31%	27%	28%	25%	52%
Late night	74%	77%	74%	79%	61%
Don't know	2%	1%	3%	1%	1%

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: Calgaryans who used taxi services, or accessible taxi services within the past year during the weekdays and/or weekend
 Note: The response set was changed in 2018

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?

□ indicates significant increase since 2017
 ○ indicates significant decrease since 2017



Purpose for Taxi Usage

- Multiple Responses Allowed -

Purpose of using taxi	2014 (n=303)	2015 (n=400)	2016 (n=365)	2017 (n=314)	2018 (n=315)
For pleasure, such as to attend a social function	56%	61%	59%	58%	53%
To and from the airport	55%	53%	54%	54%	52%
For business	28%	27%	27%	26%	25%
To get to work	16%	15%	20%	20%	18%
To get to a medical appointment	15%	14%	15%	14%	15%
To run errands	8%	9%	10%	8%	12%
To get home (unspecified)	4%	2%	4%	7%	3%
Drinking/can't drink and drive	-	-	-	2%	3%
Used taxi services while car was being repaired	2%	<1%	1%	2%	2%
Get the kids to/from school	1%	<1%	1%	1%	2%
Used in an emergency / Get to hospital	-	-	1%	<1%	1%
Other	1%	4%	4%	<1%	2%

- Taxi users mainly opt to use taxi services to attend a social function (53%), or to get to and from the airport (52%), consistent with 2017.
- In addition, taxis are being used for business purposes (25%), to get to work (18%), or to get to medical appointments (15%).
- Fewer taxi users are using taxi services to run errands (12%), or to get home (3%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 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:*



Taxi Pick-Up Location

- Multiple Responses Allowed -

Taxi pick-up location	2014 (n=303)	2015 (n=400)	2016 (n=365)	2017 (n=314)	2018 (n=315)
The downtown core, including the Beltline area	38%	41%	42%	39%	46%
The Southwest	26%	25%	24%	23%	31%
The Calgary airport region	-	20%	28%	23%	25%
The Northwest	23%	21%	25%	29%	23%
The Northeast	27%	19%	24%	17%	23%
The Southeast	21%	21%	21%	18%	20%
Don't recall	-	1%	<1%	<1%	<1%

- The greatest proportion (46%) of taxi users indicate being picked up from the downtown core.
- The proportion of pick-ups from Southwest quadrant has increased since 2017.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 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?*

◻ indicates significant increase since 2017
 ○ indicates significant decrease since 2017



Taxi Drop-Off Location

- Multiple Responses Allowed -

Taxi drop-off location	2014 (n=303)	2015 (n=400)	2016 (n=365)	2017 (n=314)	2018 (n=315)
The downtown core, including the Beltline area	23%	31%	34%	30%	38%
The Calgary airport region	-	31%	39%	37%	35%
The Southwest	26%	23%	26%	23%	29%
The Northeast	45%	24%	23%	23%	27%
The Northwest	19%	21%	25%	25%	22%
The Southeast	23%	19%	20%	15%	19%
Don't recall	3%	1%	1%	<1%	1%

- The most common drop-off locations for taxi services are in the downtown core (38%), and in the airport region (35%), consistent with 2017.
- Fairly similar proportions of taxi users are being dropped off by taxis in the SW (29%), NE (27%), and NW (22%) – consistent with 2017.
- A lesser proportion of taxi users got dropped off in SE (19%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 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?*



Method Used to Obtain Taxi Services

- Multiple Responses Allowed -

Method to obtain taxi	2014 (n=303)	2015 (n=400)	2016 (n=365)	2017 (n=314)	2018 (n=315)
Phoning the taxi company’s dispatch telephone number for immediate service	57%	63%	68%	68%	63%
Phoning the taxi company’s dispatch to pre-book a future trip*	62%	60%	51%	53%	50%
Hailing or flagging a taxi	32%	36%	36%	37%	35%
Booking a taxi online or via an App	12%	16%	22%	26%	31%
Calling a taxi driver directly to arrange a ride	13%	12%	20%	21%	27%
Using a designated taxi stand NOT located at a hotel	15%	15%	21%	20%	22%
Using a hotel taxi stand	20%	16%	15%	11%	13%

- Taxi users most commonly phone dispatchers to obtain a taxi, either by phoning dispatchers for immediate service (63%), or via pre-booking a taxi (50%).
- In addition, more than one-third (35%) of taxi-users report having hailed a cab this past year, 22% have used a designated taxi stand NOT located at a hotel, and 13% say they have used a hotel taxi stand.
- Not following the traditional dispatch route, 27% of taxi users are participants of “Code 8s” calling taxi drivers directly to arrange a ride (trending up since 2015).
- There has been a steady upward trend of taxi users who obtained taxi services via online bookings or a taxi App since 2014.
- Those more likely to have used an App/online booking service include Calgarians who are aged 18 to 54 years and are heavy taxi users (11+ taxi trips in the past year compared to 1-5 trips).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

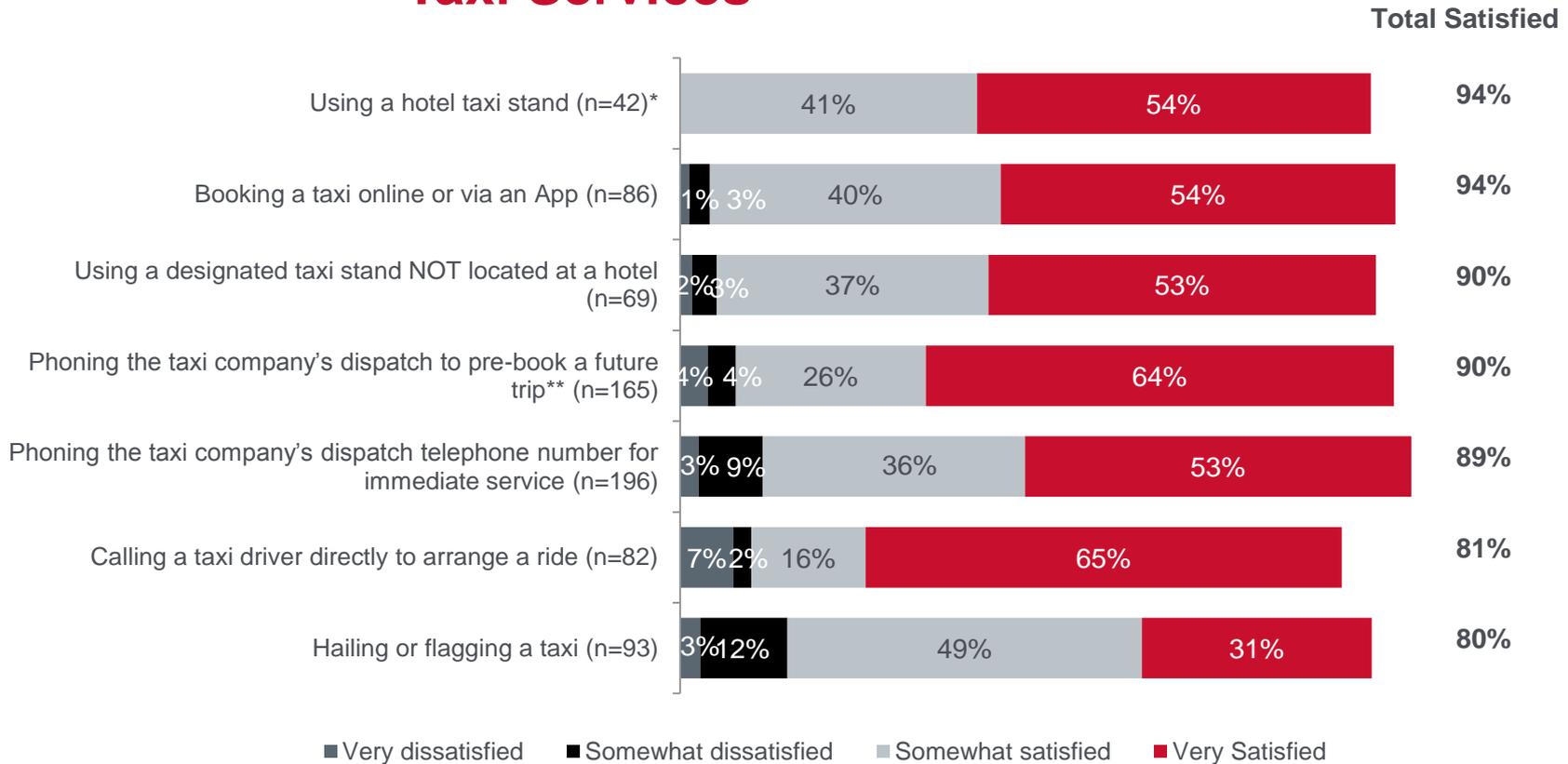
*Slight change in wording in 2018

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?



Satisfaction with Method Used to Obtain Taxi Services



- The majority of taxi users are satisfied with all methods of obtaining a taxi. Satisfaction is high when using a taxi stand (94%) or when booking a taxi online (94%). Further, 90% of taxi users are satisfied with using a taxi stand not located at a hotel or pre-booking a future trip with dispatchers.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

Don't know responses are not shown / **Slight change in wording in 2018

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

****Small sample, interpret with caution***



Satisfaction with Method Used to Obtain Taxi Services (Trends Over Time)

Total Satisfied	2014	2015	2016	2017	2018
Using a hotel taxi stand	97%	94%	88%	86%	94%
Booking a taxi online or via an App	82%	92%	85%	95%	94%
Using a designated taxi stand NOT located at a hotel	97%	92%	92%	95%	90%
Phoning the taxi company's dispatch to pre-book a future trip**	88%	90%	88%	91%	90%
Phoning the taxi company's dispatch telephone number for immediate service	70%	81%	84%	86%	89%
Calling a taxi driver directly to arrange a ride	92%	91%	86%	90%	81%
Hailing or flagging a taxi	76%	73%	74%	76%	80%

- Satisfaction ratings are consistent with 2017.
- Satisfaction with phoning dispatchers for immediate service is trending upward since 2014, and satisfaction with hailing or flagging a taxi is trending upwards since 2015.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

**Slight change in wording in 2018

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



Satisfaction with Method Used to Obtain Taxi Services (Trends Over Time)

Very Satisfied	2014	2015	2016	2017	2018
Calling a taxi driver directly to arrange a ride	62%	76%	53%	55%	65%
Phoning the taxi company's dispatch to pre-book a future trip**	50%	61%	60%	59%	64%
Using a hotel taxi stand	56%	67%	53%	73%	54%
Booking a taxi online or via an App	51%	50%	56%	66%	54%
Using a designated taxi stand NOT located at a hotel	44%	58%	55%	64%	53%
Phoning the taxi company's dispatch telephone number for immediate service	26%	43%	48%	50%	53%
Hailing or flagging a taxi	32%	30%	25%	25%	31%

- Strong satisfaction is consistent with 2017.
- Strong satisfaction with the following is trending up for:
 - Calling a taxi driver directly to arrange for a ride (trending up since 2016)
 - Phoning the taxi dispatch number for immediate service (trending up since 2014)

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

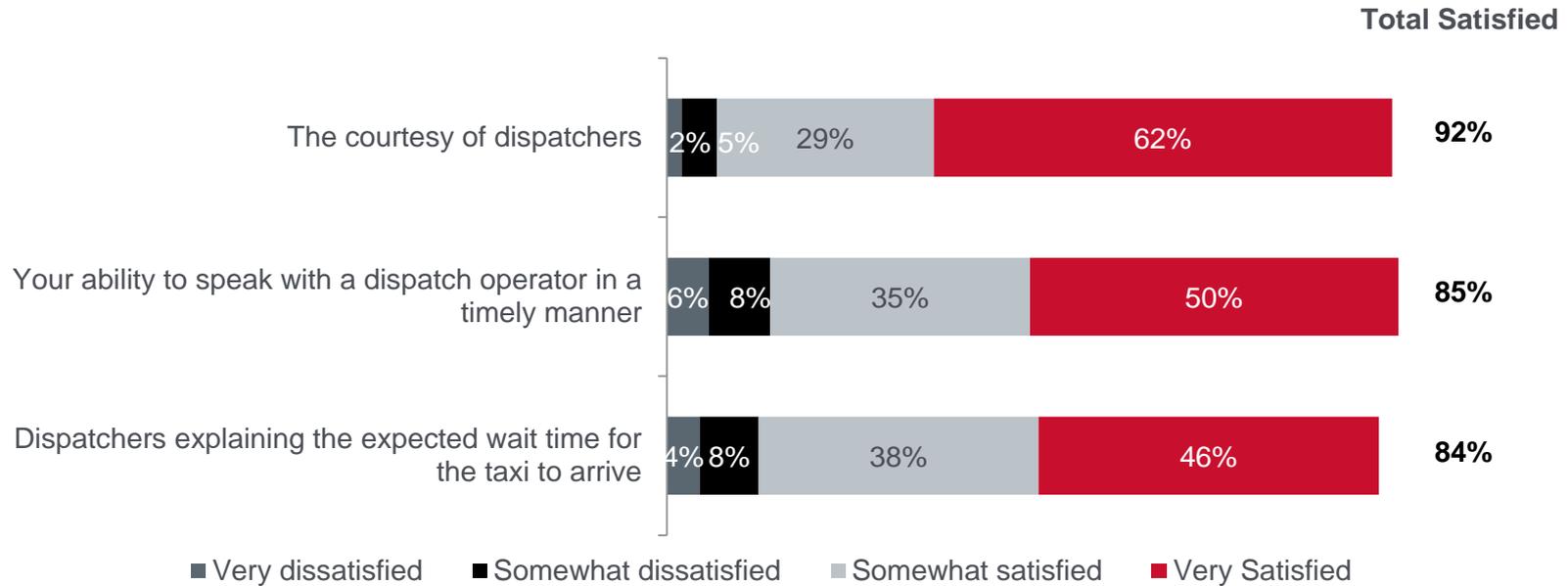
Base: Calgaryans who have used each method within past year when obtaining a taxi

**Slight change in wording in 2018

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



Satisfaction with Dispatchers



- The majority of taxi users who phoned dispatch within the past year are satisfied with the courtesy of dispatchers (92%), with their ability to speak with a dispatcher in a timely manner (85%), and dispatchers explaining the expected wait time for taxis to arrive (84%).
- The intensity of satisfaction with all parameters is high (two-in-five or more).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

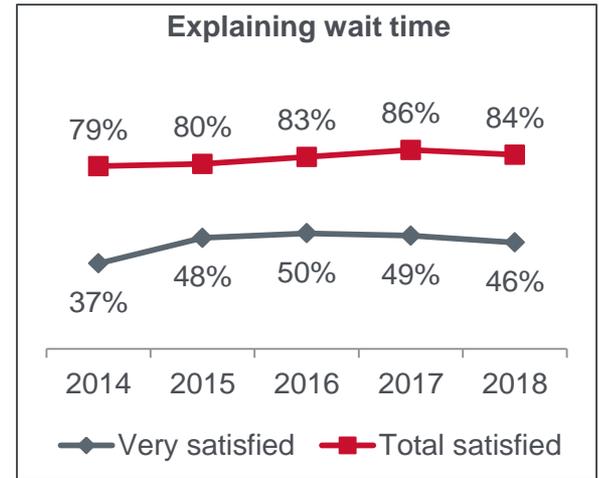
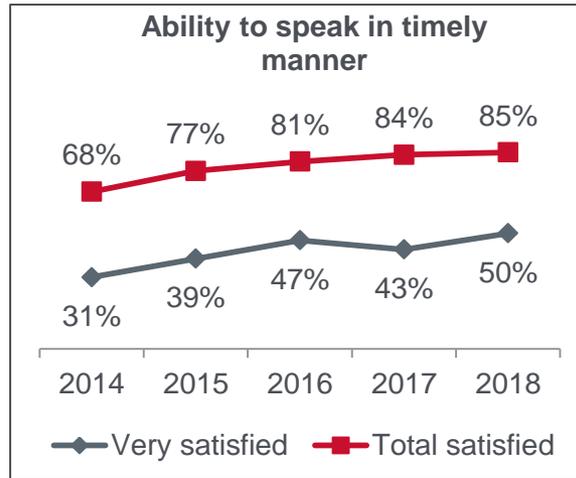
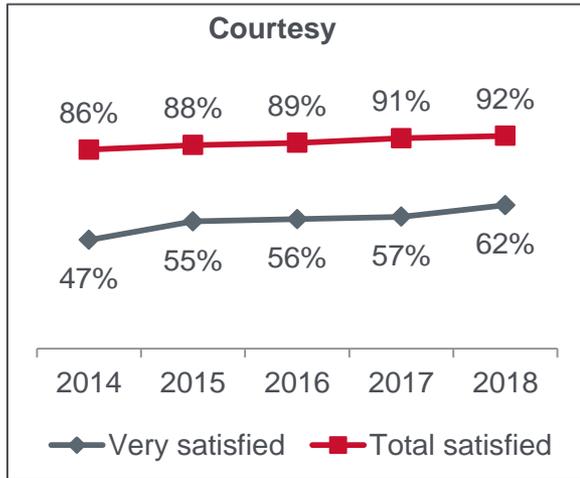
Base: Calgaryans who phoned the company's dispatch telephone number within the past year (n=252)

Don't know responses are not shown

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 Dispatchers (Trends Over Time)



- Satisfaction with all parameters is trending upward since 2014, except dispatchers explaining the wait times which is consistent with 2017.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

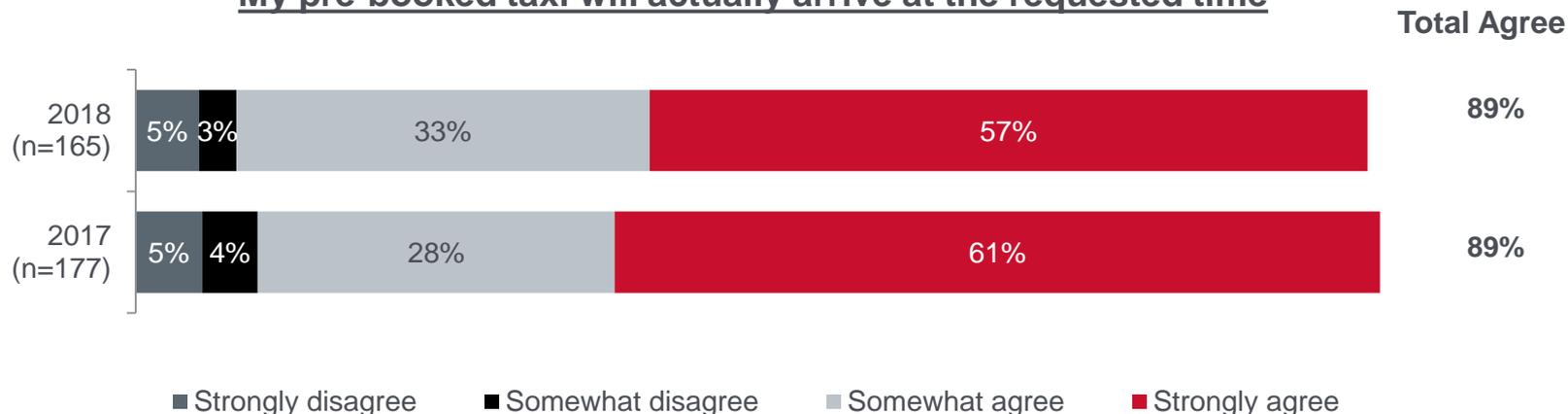
Base: Calgaryans who phoned the company's dispatch telephone number within the past year (2018, n=252; 2017, n=270; 2016, n=310; 2015, n=355; 2014, n=267)

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



Pre-booking Services

My pre-booked taxi will actually arrive at the requested time



- Nine-in-ten (89%) taxi users who phoned the dispatch to pre-arrange a ride agree that their pre-booked taxi will arrive at the requested time, including nearly three-in-five (57%) who strongly agree, consistent with 2017.
- Agreement ratings are higher among those who:
 - Used a taxi in the past year on weekends
 - Are overall satisfied with the taxi services in Calgary

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

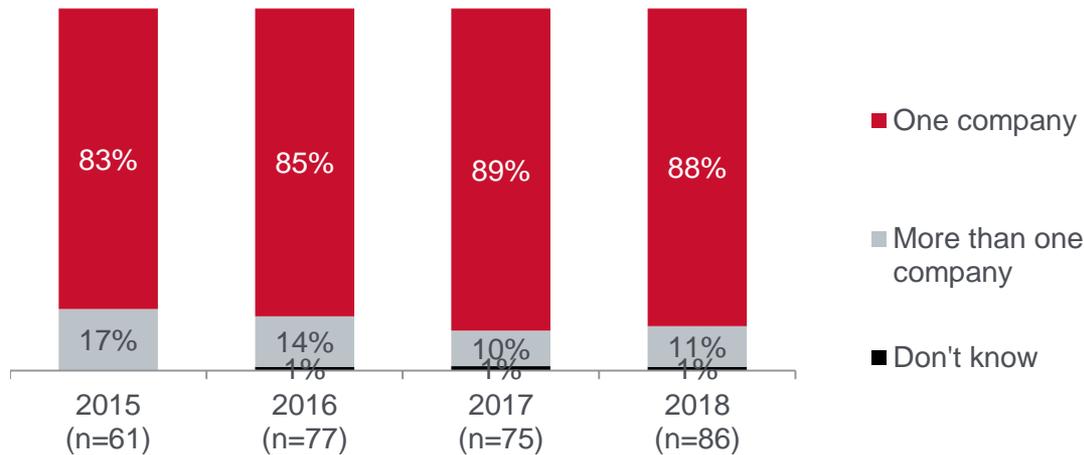
Base: Calgarians who have used taxi services or accessible taxi services within the past year and phoned the taxi company's dispatch telephone number to pre-book an arranged time not for immediate service in order to obtain a taxi

Q13i. To what extent do you agree or disagree that your pre-booked taxi will actually arrive at the requested time?

New question in 2017 / Don't know responses are not shown



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



- The majority (88%) of Calgarians who booked a taxi online/via an App indicate they booked it only with one company, consistent with 2017.
- However, 11% of this group are booking taxis online with more than one company, consistent with 2017.

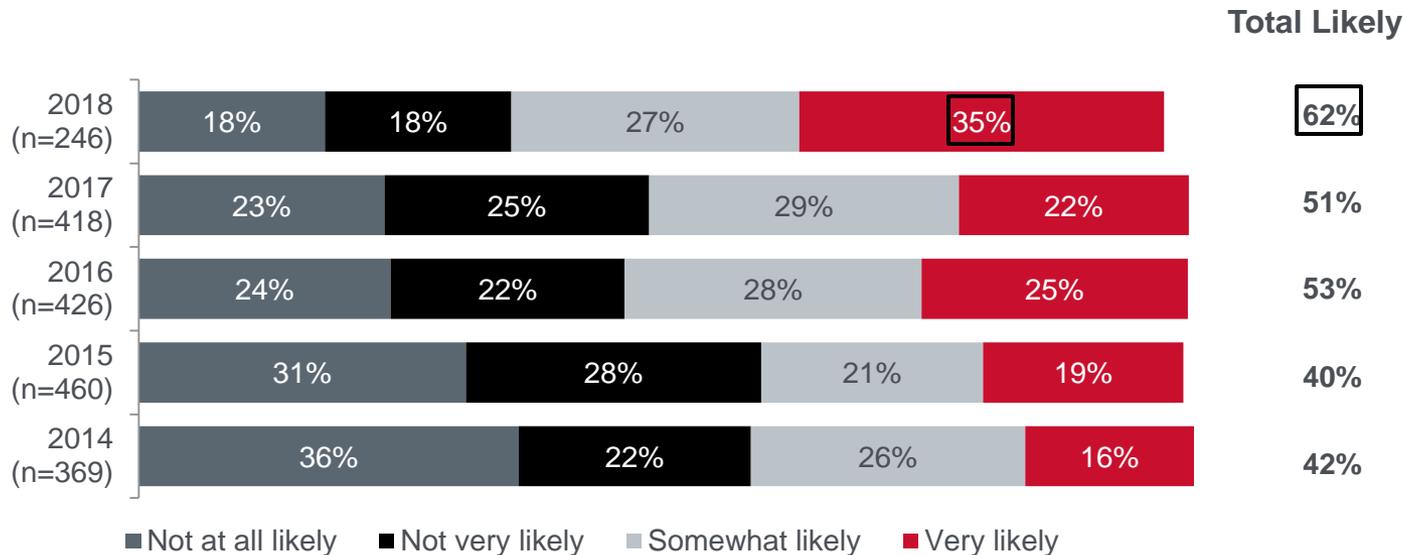
In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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



Likelihood to Use Online-Enabled Booking System



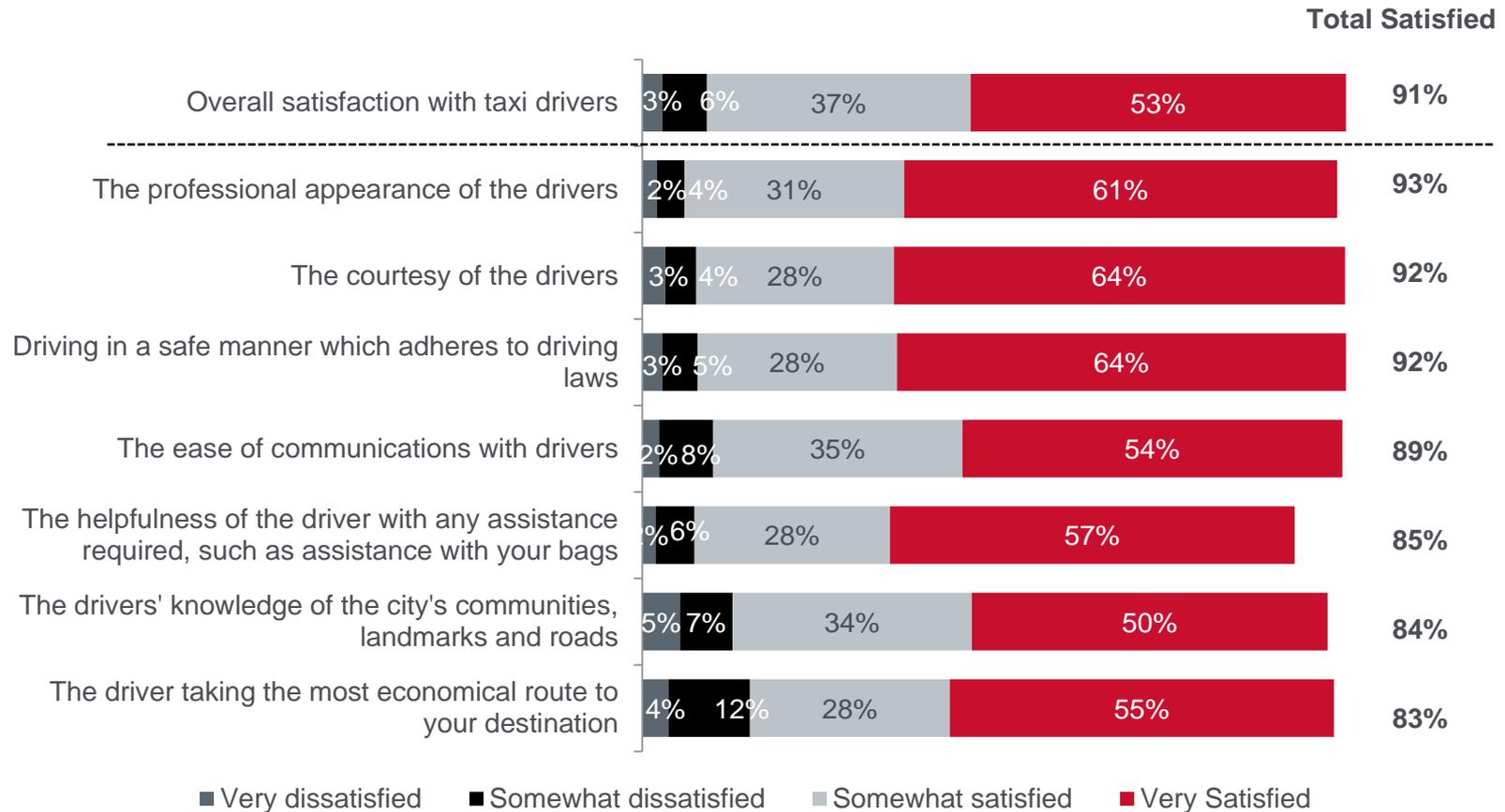
- Close to one-third (31%) taxi users have obtained taxi services via online booking systems or an App this past year.
- In contrast, three-in-five (62%) Calgarians who are likely to use taxi or accessible taxi services next year would be likely to use an online-enabled booking system within the next year (increase since 2017), including one-third (35%) who indicate they are very likely to use an online-enabled booking system (increase in 2017).
- Strong likelihood to use an online-enabled taxi booking system in the next year is higher among those aged 18 to 34 years, and those who indicate that they will make the complaint to City of Calgary if they had any complaint for any vehicle for hire.

□ indicates significant increase since 2017
 ○ indicates significant decrease since 2017

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 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
 Don't know responses are not shown
 Q16. How likely would you be to use online-enabled booking systems [including APPs] for taxi services in the next 12 months?



Satisfaction with Drivers



- A high majority (91%) of taxi users are satisfied overall with taxi drivers.
- More than 9-in-10 taxi users are satisfied with the professional appearance of drivers (93%), the courtesy of drivers (92%) and safe manner in which they drive (92%).
- Further, a sizeable majority is also satisfied with the ease of communication with drivers (89%), the helpfulness of the driver providing assistance (85%), with drivers' knowledge of the city (84%), and the drivers taking the most economical routes (83%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgarians who have used taxi services or accessible taxi services within the past year (n=315)

Don't know responses are not shown

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 (Trends Over Time)

Total Satisfied	2014 (n=303)	2015 (n=400)	2016 (n=365)	2017 (n=314)	2018 (n=315)
Overall satisfaction with taxi drivers	93%	94%	90%	94%	91%
The professional appearance of the drivers	93%	94%	91%	96%	93%
The courtesy of the drivers	92%	94%	90%	93%	92%
Driving in a safe manner which adheres to driving laws	92%	91%	92%	92%	92%
The ease of communications with drivers	87%	92%	87%	89%	89%
The helpfulness of the driver with any assistance required, such as assistance with your bags	81%	82%	80%	81%	85%
The drivers' knowledge of the city's communities, landmarks and roads	86%	89%	84%	86%	84%
The driver taking the most economical route to your destination	87%	89%	86%	84%	83%

- Satisfaction with helpfulness of the drivers is trending up since 2016.
- Satisfaction with the driver taking the most economical route to the destination is trending down since 2015.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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 (Trends Over Time)

Very Satisfied	2014 (n=303)	2015 (n=400)	2016 (n=365)	2017 (n=314)	2018 (n=315)
Overall satisfaction with taxi drivers	52%	56%	53%	53%	53%
The professional appearance of the drivers	53%	60%	57%	63%	61%
The courtesy of the drivers	56%	60%	56%	65%	64%
Driving in a safe manner which adheres to driving laws	63%	63%	63%	64%	64%
The ease of communications with drivers	45%	49%	50%	50%	54%
The helpfulness of the driver with any assistance required, such as assistance with your bags	45%	55%	51%	53%	57%
The drivers' knowledge of the city's communities, landmarks and roads	50%	50%	48%	49%	50%
The driver taking the most economical route to your destination	52%	50%	49%	49%	55%

- Strong satisfaction with helpfulness of the drivers and drivers' knowledge of the city is trending up since 2016.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

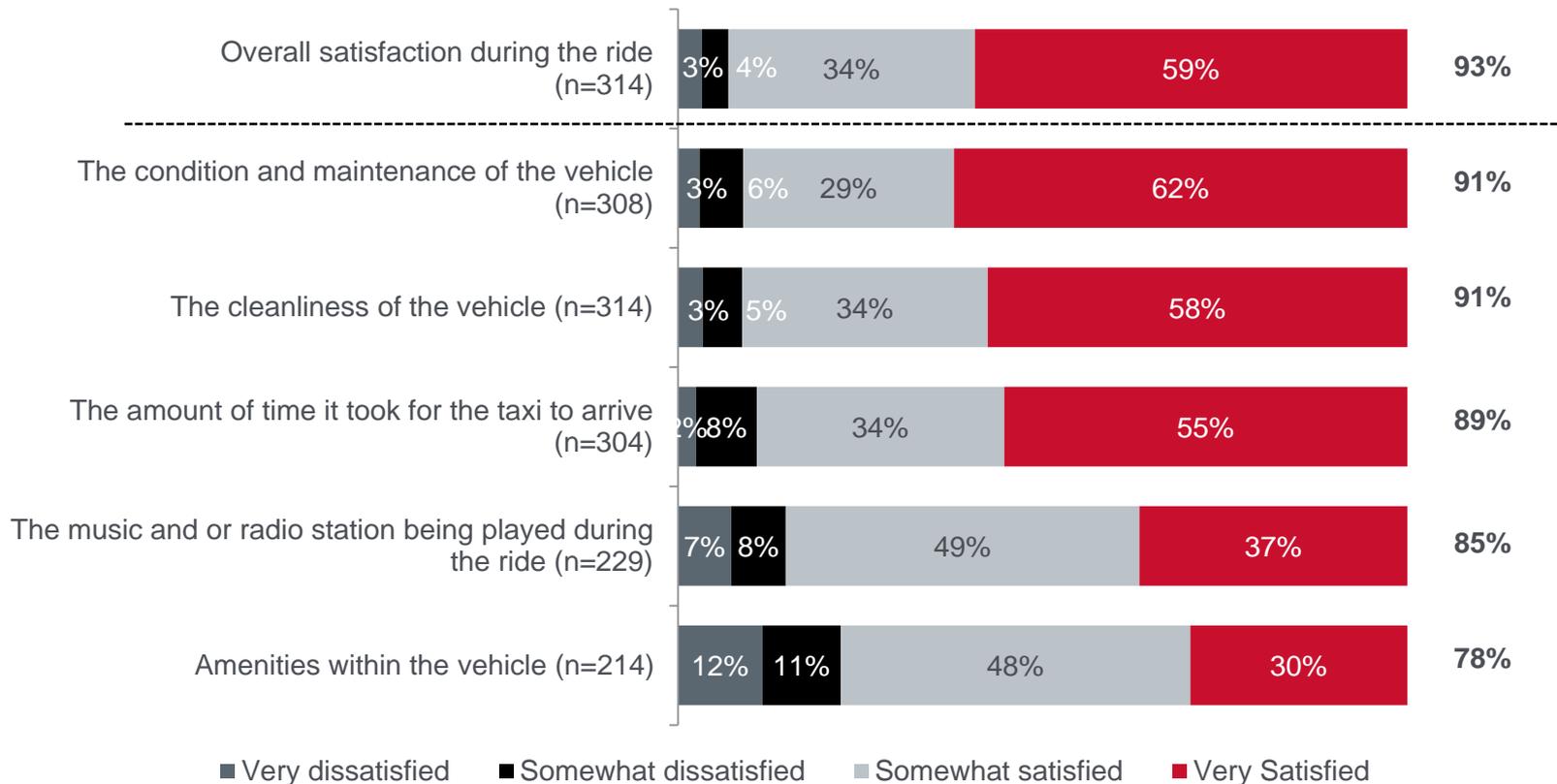
Base: Calgarians who have used taxi services or accessible taxi services within the past year

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 Experiences During the Ride

Total Satisfied



- Overall, taxi users remain satisfied with their various experiences during their taxi rides this past year.
- More than nine-in-ten taxi users are satisfied with their ride overall (93%), with the condition and maintenance of the vehicle (91%), and with the cleanliness of the vehicle (91%).
- Further, 89% are satisfied with the amount of time it took for their taxi to arrive and 85% are satisfied with radio stations played during the ride. As well, 78% are satisfied with the amenities in the vehicles.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgaryans 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 (Trends Over Time)

Total Satisfied	2014	2015	2016	2017	2018
Overall satisfaction during the ride	91%	96%	93%	95%	93%
The condition and maintenance of the vehicle	94%	93%	93%	94%	91%
The cleanliness of the vehicle	95%	93%	93%	95%	91%
The amount of time it took for the taxi to arrive	82%	88%	86%	89%	89%
The music and or radio station being played during the ride	86%	85%	84%	86%	85%
Amenities within the vehicle	74%	79%	72%	76%	78%

- Satisfaction with amenities in the vehicle is trending up since 2016.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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 (Trends Over Time)

Very Satisfied	2014	2015	2016	2017	2018
Overall satisfaction during the ride	47%	57%	53%	54%	59%
The condition and maintenance of the vehicle	57%	60%	53%	60%	62%
The cleanliness of the vehicle	56%	61%	57%	60%	58%
The amount of time it took for the taxi to arrive	41%	47%	52%	53%	55%
The music and or radio station being played during the ride	38%	40%	38%	41%	37%
Amenities within the vehicle	30%	33%	34%	33%	30%

- Strong satisfaction with the ride overall is trending up since 2016.
- Strong satisfaction with the condition and maintenance of the vehicle is trending up since 2016.
- Strong satisfaction with the amount of time it took the taxi to arrive is trending up since 2014.

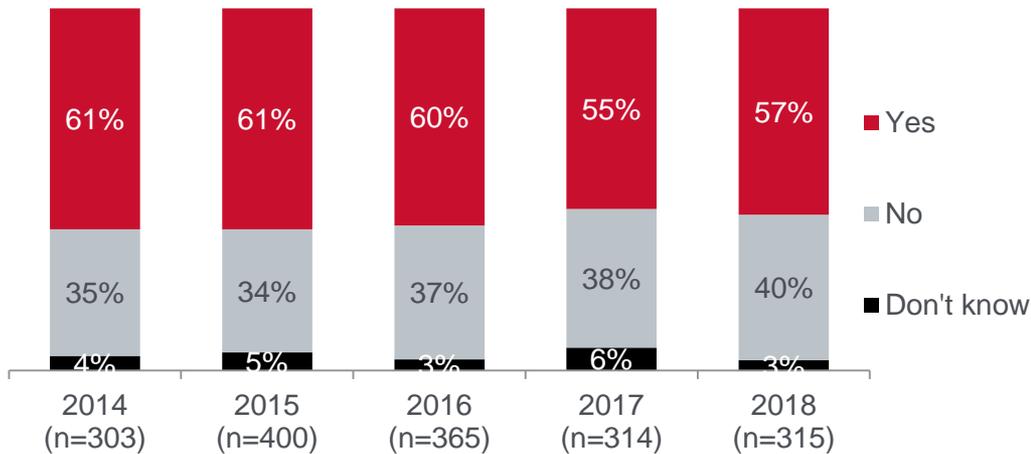
In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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:*



Drivers' Cell Phone Usage



Nearly three-in-ten (57%) taxi users indicate that their driver used a cell phone or mobile device during their ride, consistent with 2017.

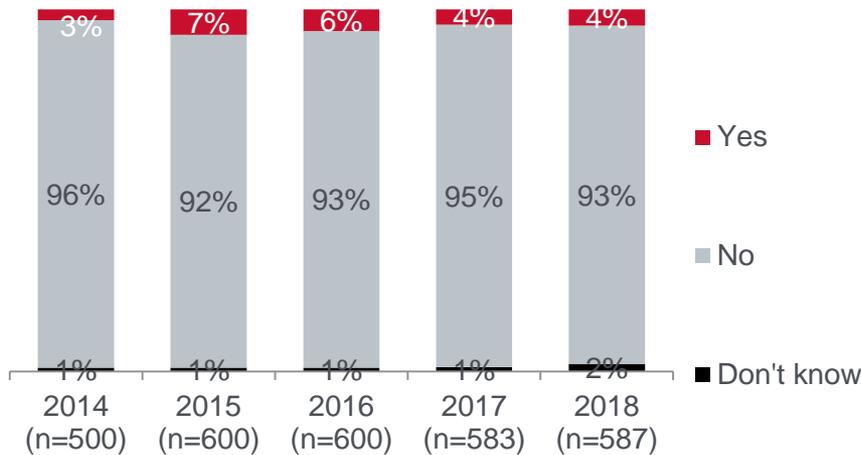
In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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, 4% of Calgarians indicate that they have been refused taxi services this past year, consistent with 2017.
- Reasons for refusal include disagreements with the length of the requested ride, being too intoxicated and the taxi not showing up.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: All Calgarians
 Q21. During the past year, has a taxi driver ever refused to provide you with a ride?



Verbatim Responses for Reason of Refusal

"He said he had a closer call."

"Not all drivers accept access card, only yellow card."

"Because he either had another client or just drive right by me."

"She does not understand it."

"Because I assumed that he thought I wasn't going to pay him because of my intoxication."

"Because he was at a taxi stand and he said the other driver was first."

"Due to meeting friends at a bar and drinking alcohol."

"No idea, he refused after we told him where we want to go."

"Too short of a distance."

"We had called and booked another company but they just pulled up and we were going to hop in but he refused."

"I only had 20 bucks to my name."

"Couldn't find where I was so declined me."

"He asked where I was going, I gave him the answer, then after he just drove away I assumed it wasn't enough for him do."

"They just didn't want to take my friend in the cab."

"He was being racist."

"I was drunk."

"Because of my wife."

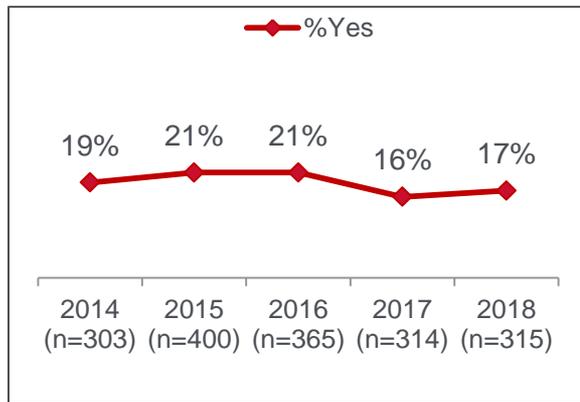
"When I flagged down a taxi and told him where I was going, I wanted to go South and he said 'sorry I can't drive you because I'm going North.' However, if a taxi driver takes a booking and picks someone else on the way, they try to drop you off."

"I believe he wanted a airport trip, I wanted a short one."

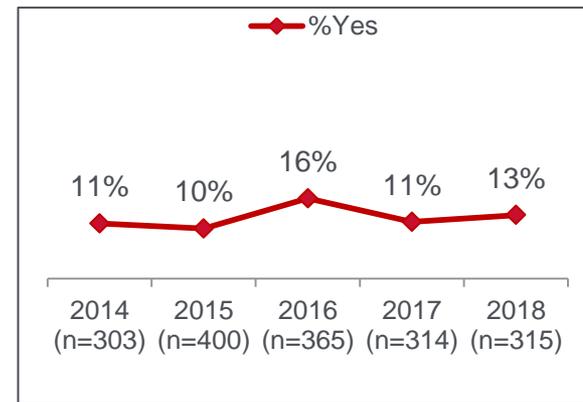


Payment Issues

The debit/credit card machine being broken



The driver not having the correct cash change for your payment



- Approximately one-in-six taxi users (17%, consistent with 2017) report that they have experienced issues with the debit/credit machine being broken.
- Nearly one-in-seven taxi users (13%, consistent with 2017) report that the driver did not have the correct change for their payment.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: Calgarys 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:

TNC Services



Company Used for TNC Ride

TNC Company	2018 (n=116)
Uber	85%
Checker	5%
Other	6%
Don't recall	7%

- Majority of the Calgarians who have used TNC services in the past year have used Uber (85%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

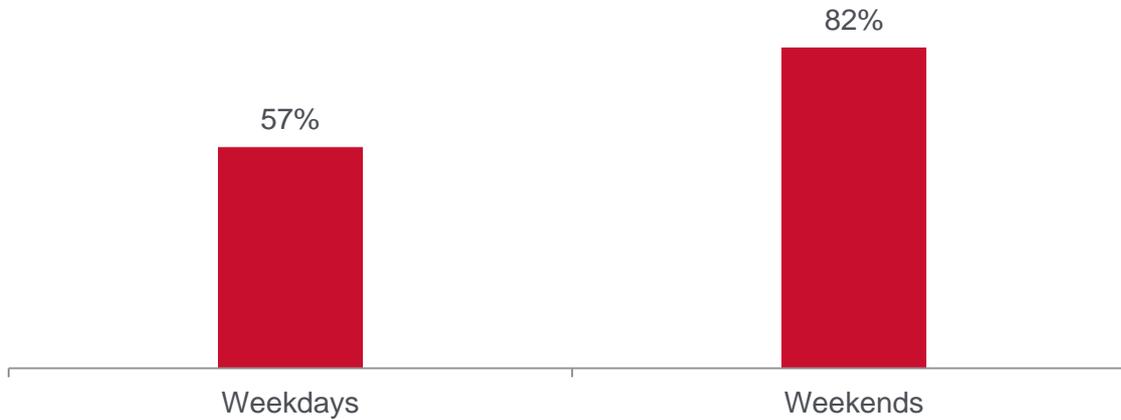
Base: Calgarians who have used TNC services within the past year

New question in 2018

Q55 - When using TNC services this past year, which company did you use most often?



TNC Usage by Days of the Week



- Within the past year, nearly three-in-five TNC users accessed TNC services during weekdays (57%) and four-in-five used TNCs during weekends (82%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: *Calgarians who have used TNC services within the past year*

New question in 2018

Q56. *Within the past year, did you use TNC services:*



TNC Usage by Time of Weekday/Weekend

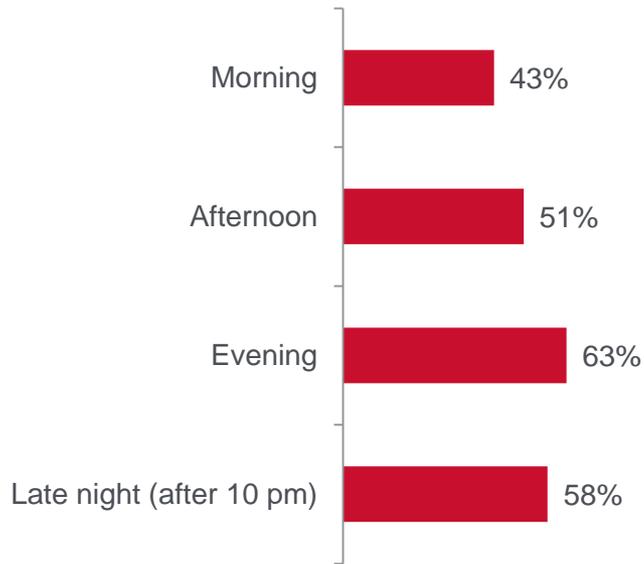


WEEKDAY

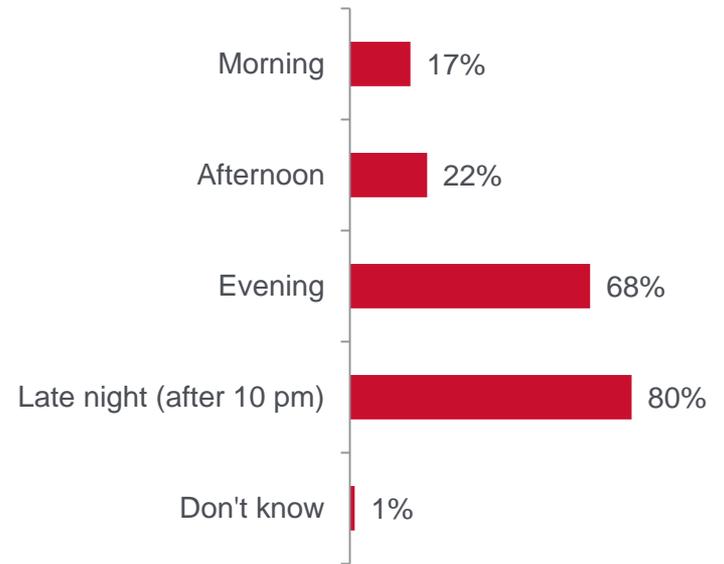
- Multiple Responses Allowed -



WEEKEND



- **Weekday** usage is spread out through the day.
- **Weekend** usage peaks during the late night (80%).



In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis
 Base: Calgaryans who used TNC services within the past year during the weekdays (n=66) and/or weekend (n=92)
 New question in 2018
 Q57. Within the past year, at which times of day did you use TNC services in Calgary during weekdays Monday to Friday?



Purpose for TNC Usage

- Multiple Responses Allowed -

Purpose of using TNC	2018 (n=116)
For pleasure, such as to attend a social function	77%
To get to the airport	38%
For business	21%
To get to work	17%
To run errands	13%
To get to a medical appointment	9%
Other	11%

- TNC users mainly opt to use TNC services to attend a social function (77%), or to get to the airport (38%).
- In addition, TNCs are being used for business purposes (21%), to get to work (17%), to run errands (13%) and/or to get to medical appointments (9%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: *Calgarians who have used TNC services within the past year*

New question in 2018

Q59A .Thinking of the TNC services that you used within the past year, for what purposes did you use a TNC? Was it:



TNC Pick-Up and Drop-Off Location

- Multiple Responses Allowed -

TNC pick-up location	2018 (n=116)
The downtown core, including the beltline area	63%
The Northwest	34%
The Southwest	34%
The Southeast	23%
The Northeast	20%
The Calgary airport region	17%
Don't recall	<1%

TNC drop-off location	2018 (n=116)
The downtown core, including the beltline area	60%
The Southwest	34%
The Calgary airport region	32%
The Northwest	25%
The Northeast	23%
The Southeast	23%
Don't recall	<1%

➤ The most common pick up and drop-off location is the downtown core.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

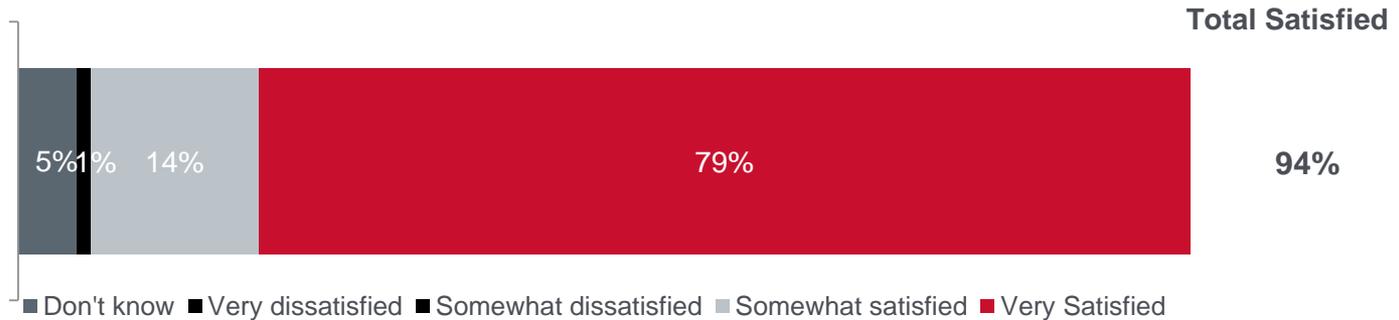
Base: *Calgarians who have used TNC services within the past year*

New question in 2018

Q60 - *Thinking of the TNC rides you took over the past year, from which region of the city did you get picked up?* Q61 - *And thinking of the TNC rides you took over the past year, in which region of the city did you get dropped off?*



Satisfaction with Online Booking App



- A high majority (94%) of TNC users are satisfied with the online booking app, including four-in-five (79%) who are very satisfied.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

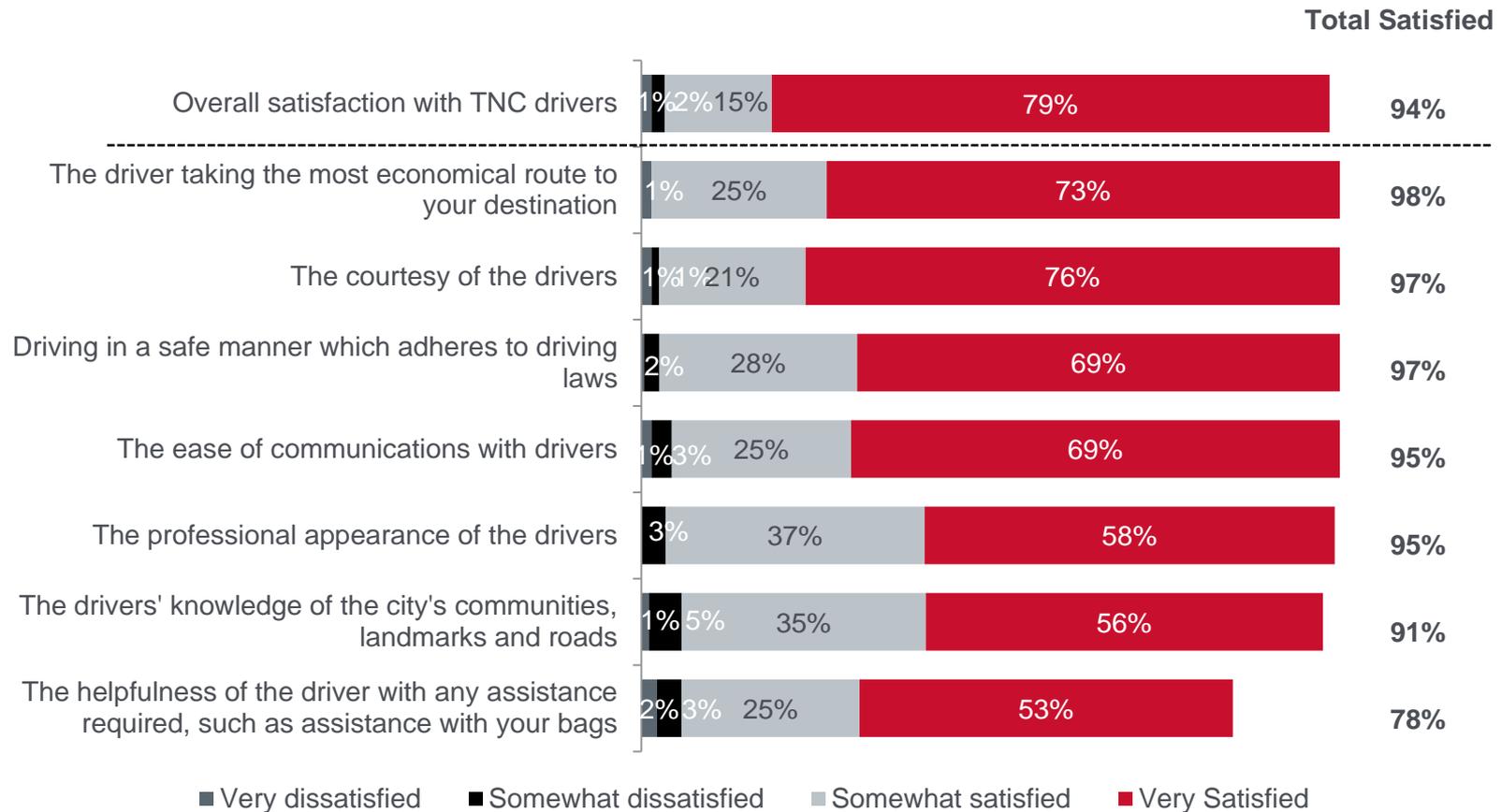
Base: Calgarians who have used TNC services within the past year (n=116)

New question in 2018

Q63 - How satisfied or dissatisfied are you with the online booking app you used to obtain a TNC ride within the past year?



Satisfaction with Drivers



- A high majority (94%) of TNC users are satisfied overall with TNC drivers.
- A range of four-in-five (78%) to almost all (98%) are satisfied with various features of TNC drivers.
- TNC users are most satisfied with the driver taking the most economical route (98%) and least satisfied with the helpfulness of the drivers with any assistance required, such as bags (78%).

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgaryans who have used TNC services within the past year (n=116)

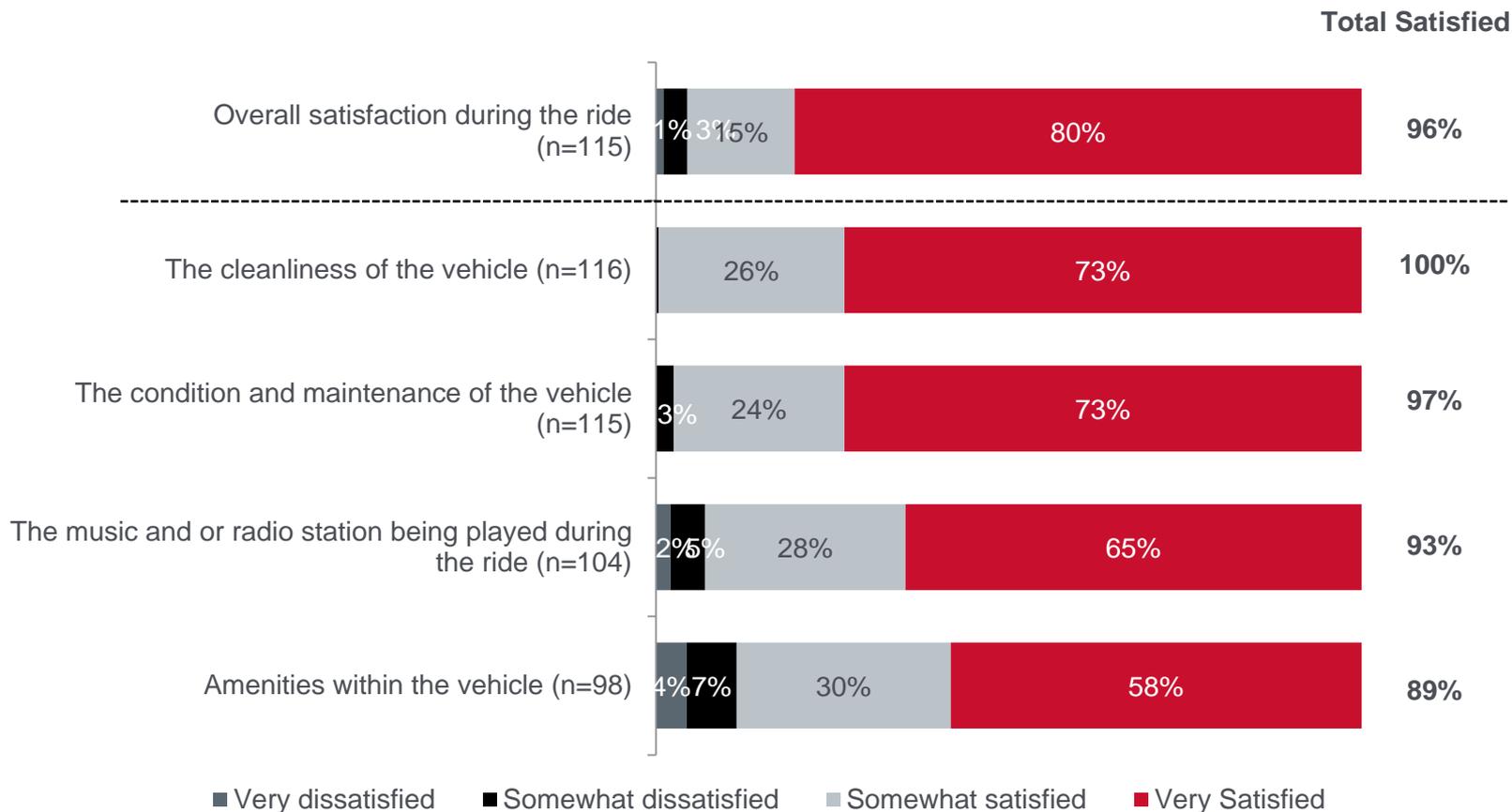
Don't know responses are not shown

New question in 2018

Q64. Please now think of your overall experiences with the TNC drivers you have had within the past year. How satisfied or dissatisfied are you with each of the following:



Satisfaction with Experiences During the Ride



- Overall, TNC users remain satisfied with their various experiences during their TNC rides this past year.
- More than nine-in-ten TNC users are satisfied with their ride overall (96%), with the cleanliness of the vehicle (100%), with the condition and maintenance of the vehicle (97%), and 93% are satisfied with radio stations played during the ride.
- Further, 89% are satisfied with the amenities in the vehicles.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

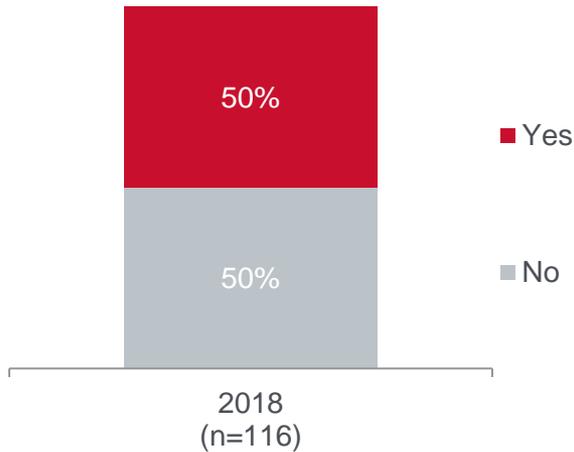
Base: Calgarians who have used TNC services within the past year – excluding N/A and Don't know respondents

New question in 2018

Q65A - Thinking of your overall experiences during the TNC rides that you have taken within the past year, how satisfied or dissatisfied are you with each of the following?



Drivers' Cell Phone Usage



Half (50%) of TNC users indicate that their driver used a cell phone or mobile device during their ride.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

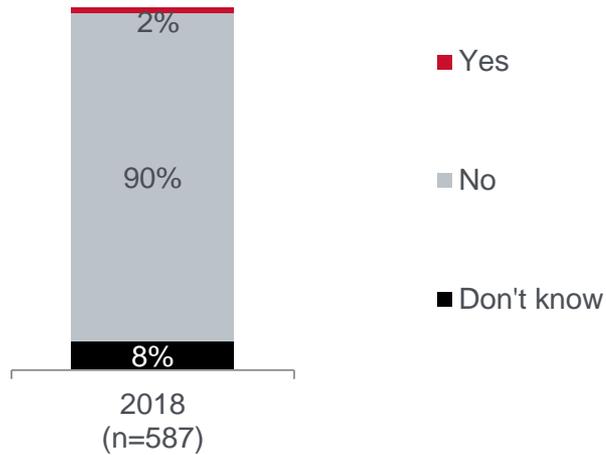
Base: *Calgarians who have used TNC services within the past year*

New question in 2018

Q66 - *During your TNC experiences over the past year, did any of your TNC 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, 2% of Calgarians indicate that they have been refused TNC services this past year.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians

New question in 2018

Q67 - During the past year, has a TNC driver ever refused to provide you with a ride?



Verbatim Responses for Reason of Refusal

"It was because I was somewhat intoxicated."

"I guess I wasn't at the front of the pickup and they weren't there."

"The driver couldn't find the address."

"I don't remember."

"Don't know."

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgarians who have been refused a ride during the past year (n=5)*

New question in 2018

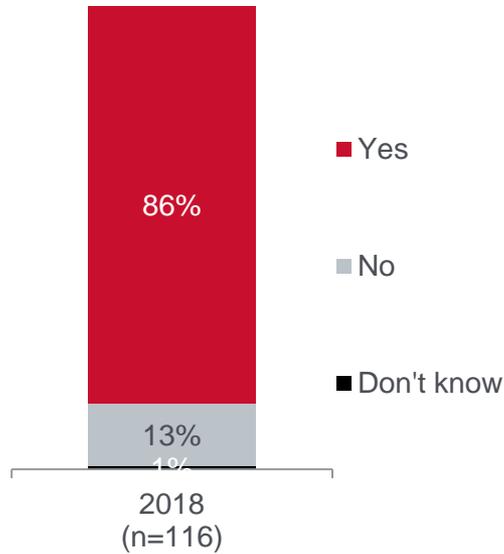
Q68 - To the best of your recollection, for what reasons did the driver refuse to provide you with a ride?

***Small sample, interpret with caution**

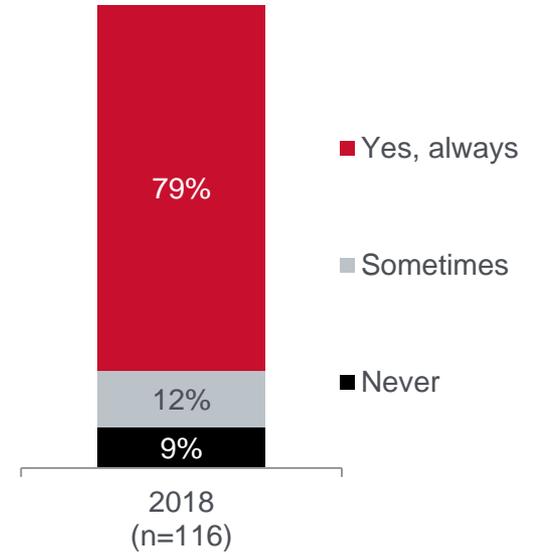


Surge Price

Aware of Surge Price



Aware of Estimate Price before the Trip



- More than four-in-five (86%) TNC users indicate that they are aware of surge price.
- Nine-in-ten (79% always, 12% sometimes) TNC users indicate that they are aware of the estimated price prior to the trip.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgaryans who have used TNC services within the past year

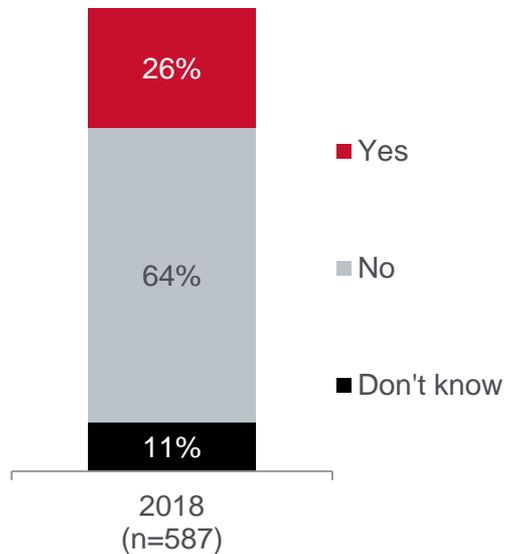
New question in 2018

Q30B. Are you aware that the rate you could be charged for a TNC ride may vary based on demand, also known as surge price? Q30C. Thinking about surge pricing, are you always aware what the estimated price will be prior to the trip?



Accessible Services Offered by TNCs

Aware of Accessible Services Offered by TNCs



- One-quarter (26%) of Calgarians indicate that they are aware that TNCs provide accessible services for accommodation of mobility device, such as a wheelchair.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians

New question in 2018

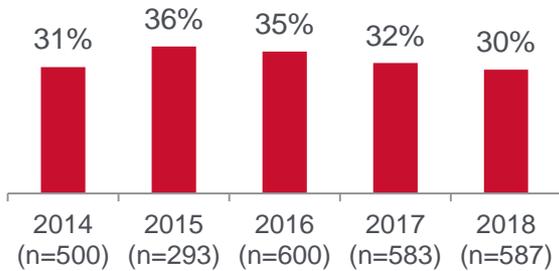
Q42E - Are you aware if TNCs provide accessible service for the accommodation of a mobility device, such as a wheelchair?

Taxis Outside Calgary



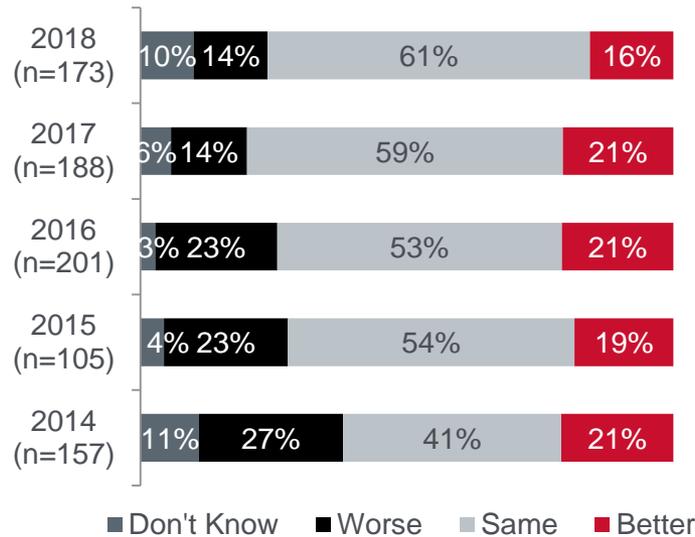
Taxis Outside Calgary

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, three-in-ten (30%) Calgarians have taken a taxi in another Canadian urban centre.
- Among these Calgarians, 61% feel that the service they received was the same as they have received in Calgary, while one-in-six (16%) feel it was better, and 14% feel it was worse, consistent with 2017.
- 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 better, as compared to 7% in 2017 who felt it was better.

In 2017 and 2018, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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?

Additional Comments



Additional Comments

Comments	2018
Lower the rate	6%
Add more cabs	4%
Not enough taxis for the disabled/ handicapped	3%
Regulate better	3%
Driver	3%
Drivers should be knowledgeable about the city	1%
Driver safety	1%
Road safety	3%
Better driver customer service	2%
Taxis should be monitored/ have built in camera	2%
Reduce wait times / Faster service	2%
Taxi services are good / No complaints	2%
Taxis should be clean	2%
Create an app for taxis	2%
More competition / Too many large corporations	2%
Communicate with the public regarding rates, ride share service, etc.	1%
Pickup/ Pre-booking need to show up/ show up on time	1%
Allow Uber	1%
Uber should follow the same regulations as taxi	1%
Not enough taxis at night	1%
More TNC services	1%
Other	4%
No additional comments	64%

- The majority (64%) of Calgarians did not offer any other comments regarding taxi services.
- Among those who did offer additional comments, common themes relate to requests for lowering the rates and adding more cabs.

Base: All Calgarians (n=587)/ Mentions less than 1% not shown/Multiple responses allowed /In 2017, 2018 current and former drivers of taxis, limousines or TNC are excluded from the analysis Q45. What additional comments or advice, if any, do you wish to provide The City of Calgary regarding taxi , accessible taxi, limousine, and TNC services in Calgary?

Demographics





	Calgarians (n=587)
Gender	
Male	49%
Female	51%
Age	
18 - 24 years	12%
25 - 34	21%
35 - 44	20%
45 - 54	18%
55 - 64	12%
65 years of age or older	16%
Prefer not to answer	<1%
Quadrant of Residence	
Downtown Core, including the Beltline area	7%
Northwest	24%
Northeast	18%
Southeast	28%
Southwest	23%
Prefer not to answer	<1%

	Calgarians (n=587)
Vehicle Access	
Yes	87%
No	10%
Prefer not to answer	2%
Member of Car-sharing Program	
Yes	10%
No	90%
Income	
Less than \$40,000	13%
\$40,000 to less than \$60,000	12%
\$60,000 to less than \$80,000	12%
\$80,000 to less than \$100,000	9%
\$100,000 to less than \$120,000	8%
More than \$120,000	23%
Prefer not to answer	22%