

LTAC – Citizen Satisfaction 2017

Report of Telephone Survey

Prepared for The City of Calgary by:

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Context and Objectives

Context:

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

This report represents the findings from the 2017 telephone survey with 600 Calgarians and includes comparisons to the data collected in 2016, 2015 and 2014.

Objectives:

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

Methodology

Sample Size

2017: n=583 (including 314 taxi users;
excluding current and former drivers of taxis,
limousines or TNC)
2016: n=600 (including 365 taxi users)
2015: n=600 (including 400 taxi users)
2014: n=500 (including 303 taxi users)

Target Audience

Random representative sample of Calgarians
aged 18+

Survey Method

Random digit dialing using both landline and cell
phone telephone exchanges via a Computer
Assisted Telephone Interviewing System

Interview Duration/Dates

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

+/- 4.1%, 19 times out of 20
(+/- 5.5% among taxi users)

Data Analysis

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

Summary of Results



Summary of Survey Results

Taxi Usage

- Within the past year, Calgarians have used the following services:
 - Taxis – 55%
 - Accessible taxis – 6%
 - Sedans – 9%
 - Limousines – 7%
 - TNCs – 17%
- Taxi users have taken 4 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 (58%), and not having a need for taxi services (26%).
- Checker Yellow Cabs and Associated Cabs together hold a sizeable majority (72%) of the market share.
- Among taxi users, 69% have used taxi services during weekdays, and 62% have used taxi services on weekends (consistent with 2016).
- Weekday taxi usage is fairly constant at all times of day, albeit slightly higher during late evening 7pm-4am (43%).
- Weekend usage peaks during the late evening, also similar to previous years' findings.

- One-half (51%) of Calgarians are likely to use taxi services and one-quarter (26%) are likely to use TNC services in the next 12 months.
- The purpose of taxi usage remains similar to last year, with the main reasons for using taxis being: to attend social functions (58%); and to get to and from the airport (54%).

Obtaining Taxi Services

- Taxi users most commonly phone dispatchers to obtain a taxi, either by phoning dispatchers for immediate service (68%), or via pre-booking a taxi (53%).
- 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. Strong satisfaction with using a hotel stand has increased in 2017.
- Half (51%) 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 (consistent with 2016).
- 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 (61%) who strongly agree.

Summary of Survey Results

Overall Satisfaction

- Satisfaction with all types of for-hire transportation services is high (a range of 88% - 98%) and consistent with 2016.
- The key factors influencing overall satisfaction include (in ranked order):
 - Taxi drivers (helpfulness, courtesy, driving safely, taking the most economical route, ease of communication, driver's knowledge)
 - Overall satisfaction during the ride (cleanliness of the vehicle, time it took to arrive, condition/maintenance, amenities)
 - Dispatchers (dispatchers explaining the expected wait time for the taxi to arrive, ability to speak with them in a timely manner)
 - Value for money

Drivers & Experiences During the Ride

- Four-in-five or more taxi users are satisfied with each aspect of taxi drivers. Satisfaction is consistent with 2016, except with professional appearance which has increased in 2017.
- Satisfaction levels with experiences during the ride remain consistent with previous years with only a few directional changes.
- Of concern, the majority (55%) of taxi users continue to experience drivers using cell phones.

- The majority of users of vehicle-for-hire services agree that they felt safe during their last ride (a range of 87%-97%).

Dispatchers

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

Payment and Value

- Some (16%, consistent with 2016) 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 (11%, consistent with 2016).
- Overall, 68% of taxi users are satisfied with the value for money they received from their taxi rides this past year, consistent with 2016. Some price-sensitivity is evident, as taxi users are highly satisfied (88%) with the overall taxi services they received, but less satisfied with the value for money they received (68%).

Bumper Sticker Awareness

- Following the mandatory implementation of displaying bumper stickers regarding compliments and concerns about taxi services, 36% of the general public recall having seen the bumper stickers (identical to 2016).

Summary of Survey Results

- One-in-six (17%) of those who recall the bumper sticker correctly indicate that it informed people to contact The City of Calgary via 311 – identical to 2016. 23% incorrectly report that the bumper sticker informed people to call the taxi company.

Complaints

- A total of 4% Calgarians indicates that they have made a complaint about taxi services this past year, consistent with 2016.
- However, not all taxi customers experiencing issues are making complaints, as some citizens who did not complain report that they didn't think it would make a difference (4%) or that it takes too much time to do so (2%).
- Among the few taxi users who did make a complaint about taxi services in Calgary within the past year, 83% indicate that they made the complaint to the taxi company directly, and 12% complained via 311 at The City of Calgary.
- Satisfaction with complaint-resolution is at 32%, a return to 2015 levels.
- The reader should note that the results regarding complaints are based on very small sample sizes.

Awareness of Rights

- The majority of Calgarians are aware that passengers have the right to direct the route or expect the most economical route (73%) and to travel with a service animal and/or portable mobility aid (63%). Half (50%) of Calgarians are aware that a passenger must pay a \$100 cleaning fee for any mess made in a taxi.
- A considerably lower proportion of Calgarians are aware that drivers may charge airport departure fees (31%) and that a driver may require a passenger to pay a deposit of up to \$30 for trips (15%).
- Awareness that passengers have the right to direct the most economical route, and to travel with a service animal/mobility aid has decreased in 2017, including a decrease in strong awareness.

Summary of Survey Results

Attitudes Towards Taxi Services

- Half or more (a range of 52% - 99%) agree with various statements regarding taxi services in Calgary.
- Two-in-five (43%) Calgarians would like more information about how taxi services operate in Calgary and about one-quarter (23%) of taxi users confess that they order more than one taxi during busy times.
- Attitudes towards taxi services in Calgary remain consistent with 2016 with an increase in agreement that there are enough taxis in Calgary to adequately serve citizens.
- There are some decreases in strong agreement ratings for the following:
 - I would like more information about how taxi services operate in Calgary
 - The City of Calgary should review how the taxi industry operates

Attitudes Towards TNC Services

- Two-in-five or more (a range of 42% - 81%) agree with various statements regarding TNC services in Calgary.

Likelihood to Bypass

- In 2017, 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%, a decrease in 2017) and/or bypass an available taxi and look for a different one if it was a taxi van (37%, a decrease in 2017).

Taxis Outside Calgary

- As a net result (%better – %worse), an overall 7% of those who have taken taxis in other Canadian urban centres feel that taxi services in Calgary are better, as compared to 2% in 2016 who felt it was worse.

Strategic Observations

Momentum is strongly in favour of TNCs

While significantly more Calgarians are still using taxis compared to TNCs there is a shift starting in the market towards TNCs. This year, fewer Calgarians are taking taxis and more are using the services of TNCs where the incidence of usage has tripled since last year.

TNCs appear to be delivering a better product than traditional taxis

Last year we noted that value for money for the taxi industry was in decline and this year we see that TNCs are delivering both higher satisfaction and higher value for money than traditional taxi services.

Dispatch is continuing its positive trends

Satisfaction with all aspects of the taxi dispatch service are continuing their positive trend. It's possible that a lower volume of calls is translating into better service from these teams – if so, customers are registering it and it remains an important driver of overall satisfaction with the taxi service.

The little irritants are getting better but still persist

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

Consumers are in need of education

After the very public conversations about TNCs, not surprisingly consumers are familiar with how these companies are regulated. They are, however, not aware of how taxis (in general) are regulated and they are losing their familiarity with their rights (and presumably, responsibilities) as passengers in taxis. There may be an opportunity for a re-education campaign.

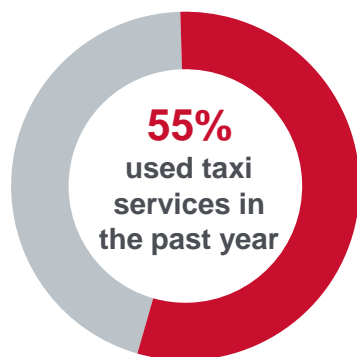
Detailed Analysis



Usage

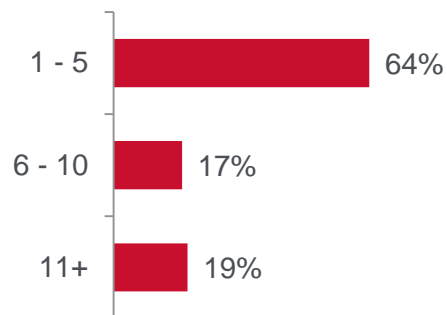
Taxi Usage

**Taxi Usage
- Past Year -**



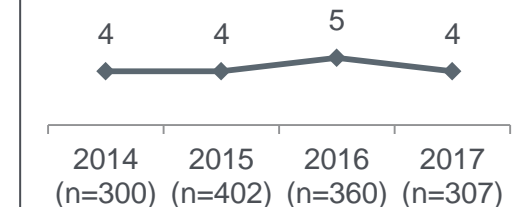
Base: Calgarians (n=583)

Trips Over the Past Year



Base: Taxi users (n=307)

Median Trips Per Year



Base: Taxi users

- More than half (55%) of Calgarians have used taxi services within the past year, a decrease from 62% in 2016.
- Users have taken 4 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 do not own a vehicle
 - Those with a household income of more than \$100,000

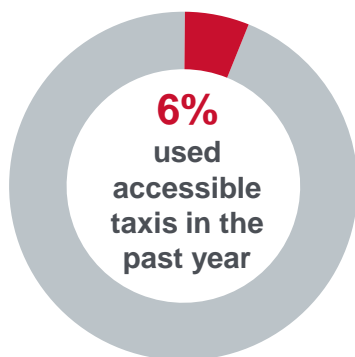
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

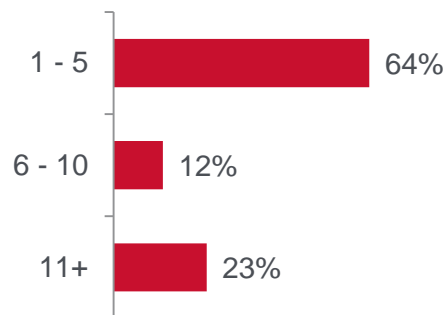
Accessible Taxi Usage

Accessible Taxi Usage
- Past Year -



Base: Calgarians (n=583)

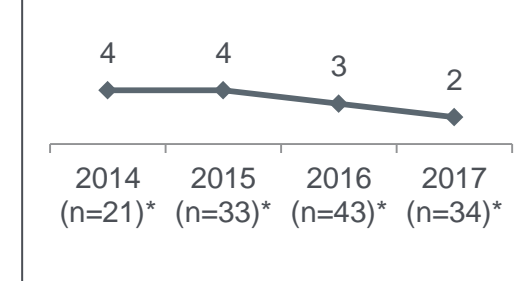
Trips Over the Past Year



**Small sample, interpret with caution*

Base: Accessible taxi users (n=34)*

Median Trips Per Year



**Small sample, interpret with caution*

Base: Accessible taxi users

- A total of 6% of Calgarians have used accessible taxi services within the past year.
- Those using accessible taxi services have taken 2 trips per year (median), trending downward since 2016. (**caution: small sample**).

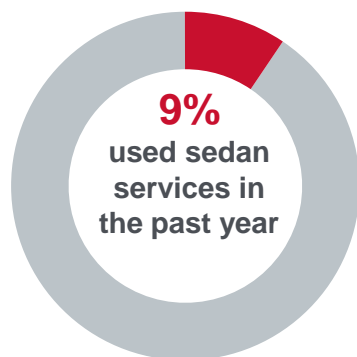
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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? Accessible taxi services for the accommodation of a mobility device
Change in wording in 2017 from "Accessible taxi services" to "Accessible taxi services for the accommodation of a mobility device"

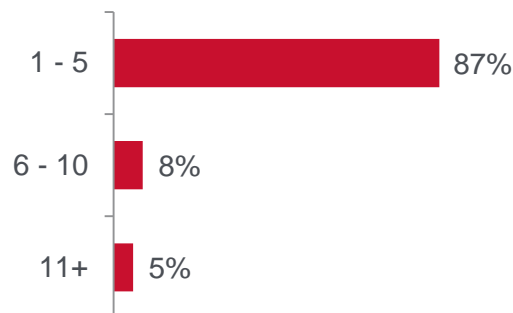
Sedan Usage

**Sedan Usage
- Past Year -**



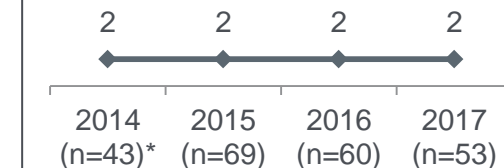
Base: Calgarians (n=583)

Trips Over the Past Year



Base: Sedan users (n=53)

Median Trips Per Year



**Small sample, interpret with caution*

Base: Sedan users

- A total of 9% of Calgarians have used sedan services within the past year.
- Those using sedan services have taken 2 trips per year (median), consistent with previous years.
- Calgarians who used sedan services within the past year are more likely to be :
 - Those with a household income of more than \$100,000

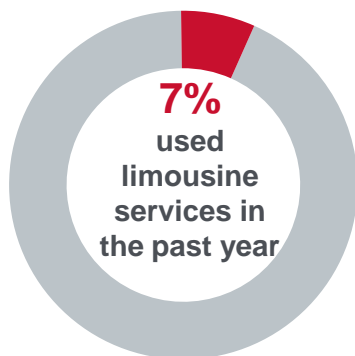
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

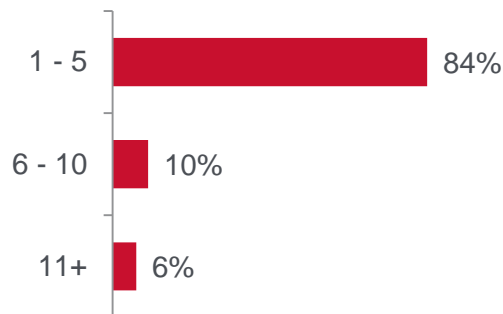
Limousine Usage

Limousine Usage
- Past Year -



Base: Calgaryans (n=583)

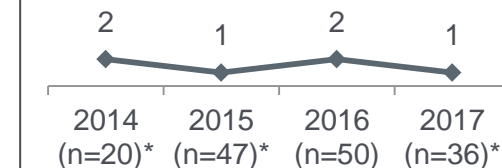
Trips Over the Past Year



**Small sample, interpret with caution*

Base: Limousine users (n=36)*

Median Trips Per Year



**Small sample, interpret with caution*

Base: Limousine users

- A total of 7% of Calgaryans have used limousine services within the past year.
- Those using limousine services have taken 1 trip per year (median), compared to 2 trips per year (median) in 2016. **(caution: small sample).**
- Calgaryans who used limousine services within the past year are more likely to be :
 - Living in Southwest Calgary
 - Those with a household income of more than \$100,000

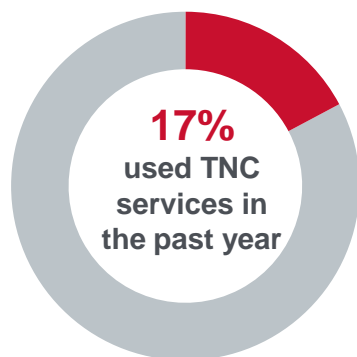
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

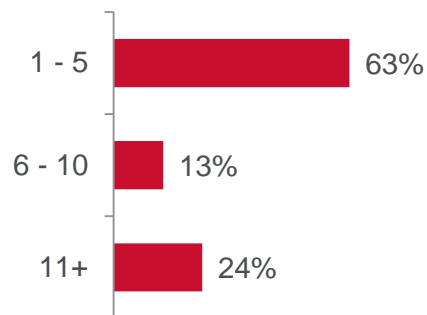
TNC Usage

**TNC Usage
- Past Year -**



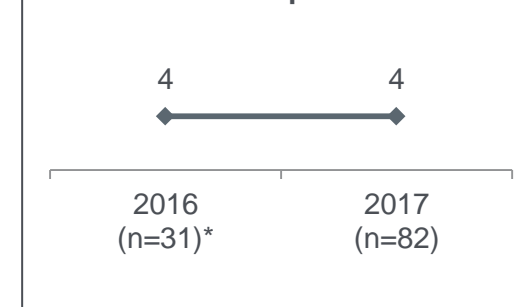
Base: Calgarians (n=583)

Trips Over the Past Year



Base: TNC users (n=82)

Median Trips Per Year



Base: TNC users

**Small sample, interpret with caution*

- One-in-six (17%) Calgarians have used TNC services within the past year, an increase from 6% in 2016.
- Those using TNC services have taken 4 trips per year (median), consistent with 2016.
- Calgarians who used TNC services within the past year are more likely to be :
 - Who identify themselves as males
 - 18-54 years of age
 - With a household income of more than \$100,000

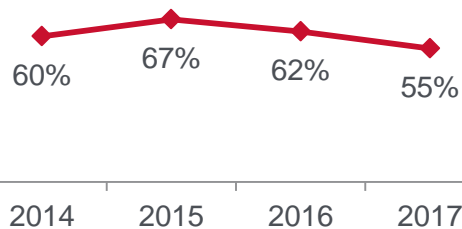
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

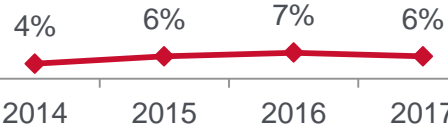
Q3. Within the **past year**, approximately how many times have you used each of the following types of services in Calgary? TNC services
Change in wording in 2017 from "ridesharing services" to "TNC services (Transport Network Companies)"

Usage of Taxi Services (Trends Over Time)

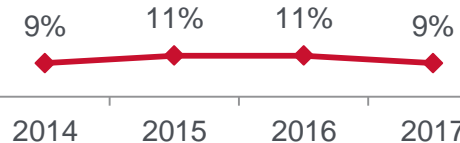
Taxi Services



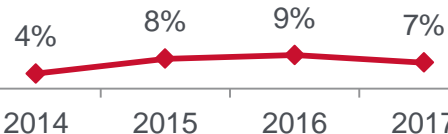
Accessible Services



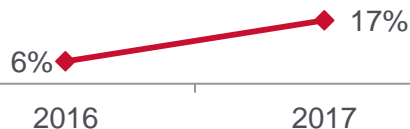
Sedan Services



Limousine Services



TNC Services*



- Usage of taxi services has decreased and that of TNC services has increased in 2017.
- Usage of accessible taxi, sedans and limousines are consistent with 2016.

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

Base: All Calgarians (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?

*changed to TNC services from Ridesharing services in 2017

Taxi Company Most Often Used



OTHER

**DON'T
RECALL**

	2015 (n=400)	2016 (n=365)	2017 (n=314)
Checker Yellow Cabs	38%	43%	40%
Associated Cab	38%	33%	32%
Mayfair Taxi	6%	8%	7%
Calgary Cab	4%	1%	4%
Delta Cab	1%	1%	1%
OTHER	1%	2%	2%
DON'T RECALL	12%	12%	15%

- Taxi users have most often used Checker Yellow Cabs (40%) and Associated Cabs (32%) this past year. These two companies appear to hold a sizeable majority (72%) of the market share.
- Further, 7% of taxi users have most often used Mayfair Taxi, 4% Calgary United Cabs, and 1% report having used Delta Cab most often this past year.
- A few respondents (2%) mention other company names and 15% cannot recall the taxi company they used most often this past year.

Overall satisfaction levels
are consistent across
companies.

In 2017, 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 in the past year
Q4 - When using taxi services this past year, which taxi company did you use most often?

Reasons for Not Using Taxi Services

- Multiple Responses Allowed -

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

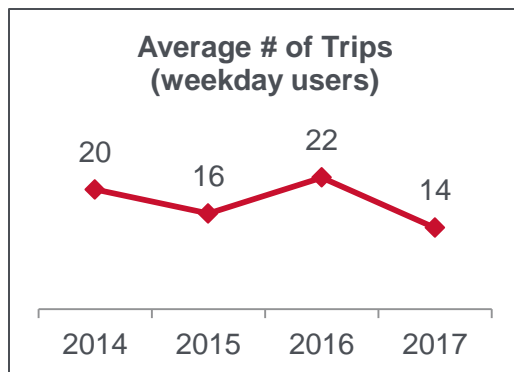
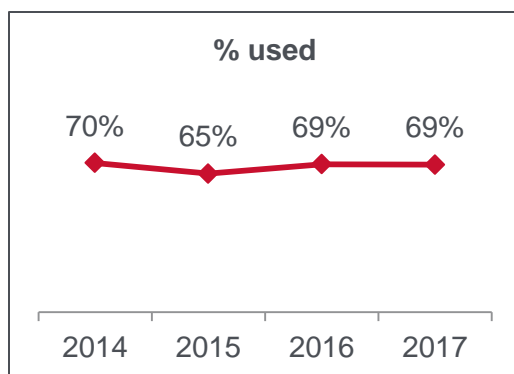
- Among those who have not used taxi services this past year, 58% explain that they use their own vehicle instead, similar to last year.
- In addition, 26% of non-taxi users report that they do not require taxi services, 15% say that they use public transit instead (an increase from 8% in 2016). Public transit usage instead of using taxi services has returned to 2015 levels.
- Others explain that they have not used taxi services this past year because fares are too expensive (9%, a directional increase since 2015), that they prefer to use Uber (2%), and that it is difficult to get a taxi (2%).

In 2017, 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?*
 *New mention in 2017

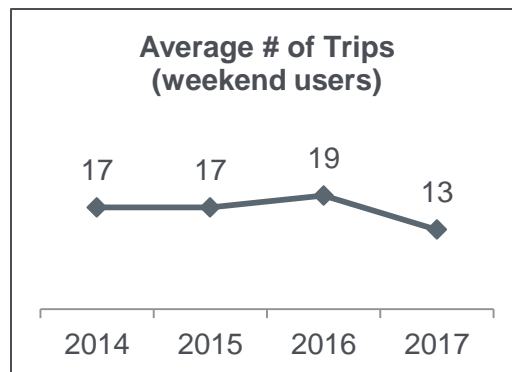
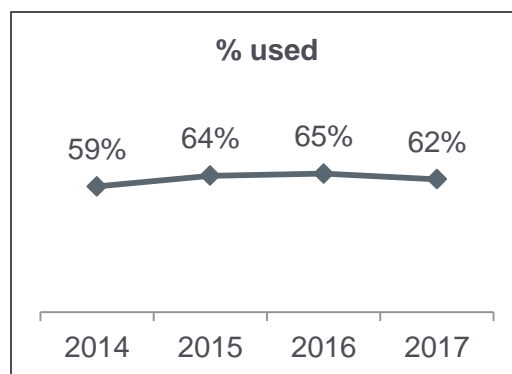
Taxi Usage by Days of the Week



WEEKDAY



WEEKEND



- Within the past year, nearly identical proportions of taxi users accessed taxi services during weekdays (69%, identical to 2016) and during weekends (62%, consistent with 2016).
- Weekday taxi usage is more likely to occur among:
 - Those aged 55+
 - Those who are picked up in Northwest Calgary or the airport region and dropped off in the airport region
 - Those who pre-book their taxi via dispatcher or take the taxi at a taxi stand, not located at a hotel
- Weekend taxi usage is more likely to occur among:
 - Those who live in Southwest Calgary
 - Those who use taxis for pleasure
 - Those who are picked up and dropped off downtown and/or Southwest Calgary
 - Those who hail a taxi
 - Those who are dissatisfied with the overall experience of taxi services

In 2017, 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)

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

	2014 Weekdays (n=214)	2015 Weekdays (n=268)	2016 Weekdays (n=256)	2017 Weekdays (n=223)
4:00am to 10:00am	43%	50%	47%	38%
10:00am to 3:00pm	28%	31%	37%	33%
3:00pm to 7:00pm	39%	40%	42%	39%
7:00pm to 4:00am	44%	42%	46%	43%
Don't know	1%	2%	1%	4%

- Multiple Responses Allowed -



WEEKEND

	2014 Weekend (n=178)	2015 Weekend (n=249)	2016 Weekend (n=228)	2017 Weekend (n=191)
4:00am to 10:00am	21%	16%	21%	20%
10:00am to 3:00pm	16%	18%	17%	15%
3:00pm to 7:00pm	31%	27%	28%	25%
7:00pm to 4:00am	74%	77%	74%	79%
Don't know	2%	1%	3%	1%

➤ **Weekday** taxi usage is fairly constant at all times of day, albeit usage is slightly higher during late evening 7pm – 4am (43%). Taxi usage has been consistent in 2017 for all times of day except early morning rush hour, where there is a decrease from 2016.

➤ **Weekend** usage peaks during the late evening (79% between 7:00pm-4:00am), similar to 2016 (74%).

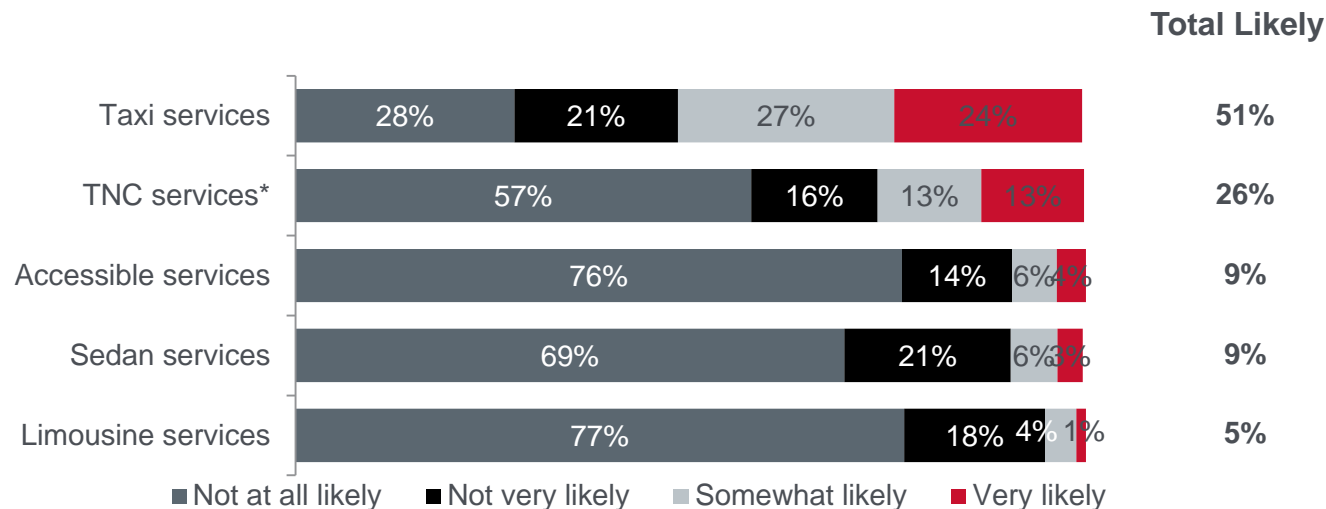
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

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

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

Projected Usage of Taxi Services (2017)



- One-half (51%) of Calgarians are likely to use taxi services and one-quarter (26%) 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:
 - 35-54 years old
 - Who do not have a vehicle of their own
 - Who have an annual household income of more than \$100,000
 - Who used a taxi for business in the past year, got picked up from the airport, and obtained the taxi through a hotel's taxi stand
- In the next 12 months, TNC services are more likely to be used by Calgarians:
 - Who identify themselves as males
 - 18-54 years old
 - Live in Southwest Calgary
 - Who have an annual household income of more than \$100,000
 - Who used taxi for business or pleasure in the past year, got picked up and/or dropped off downtown, and obtained the taxi through a hotel's taxi stand
 - Who are dissatisfied overall with taxi services in Calgary

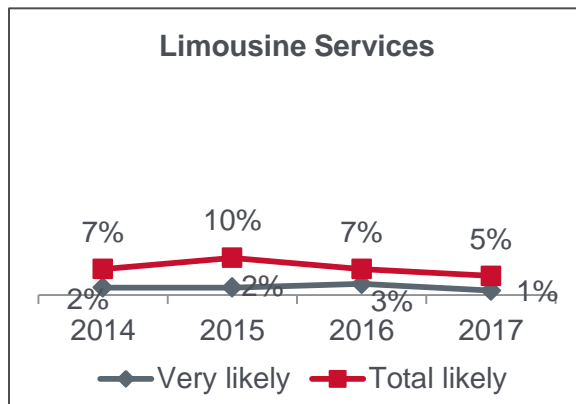
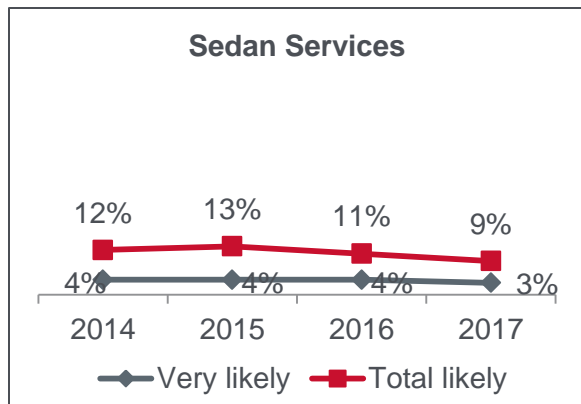
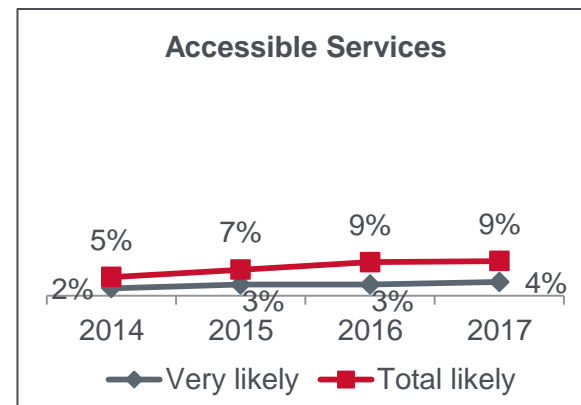
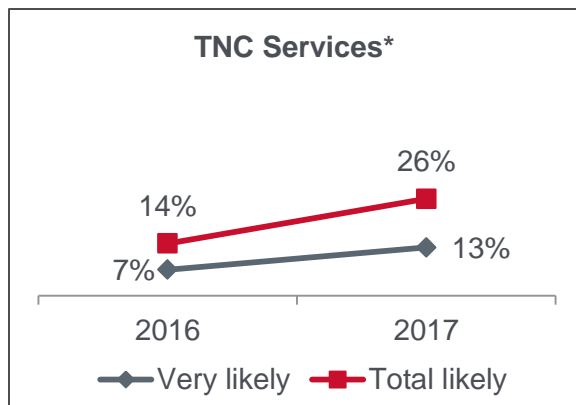
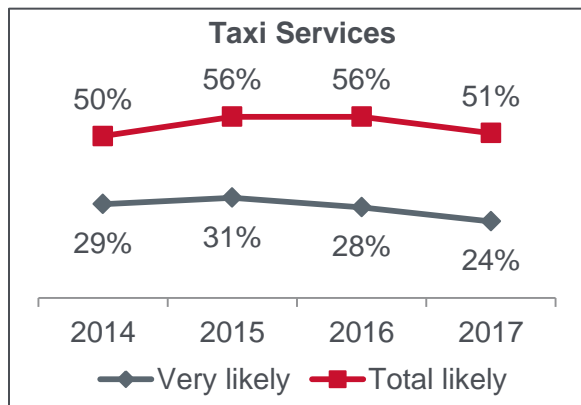
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (2017, n=583). 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?

*changed to TNC services from Ridesharing services in 2017

Projected Usage of Taxi Services (Trends Over Time)



- Compared to 2016, projected use of taxi services is consistent, however very likely ratings are trending downwards gradually.
- While projected use of other types of vehicle for hire remains consistent with 2016, likelihood of using TNC services over the next 12 months is significantly higher in 2017.

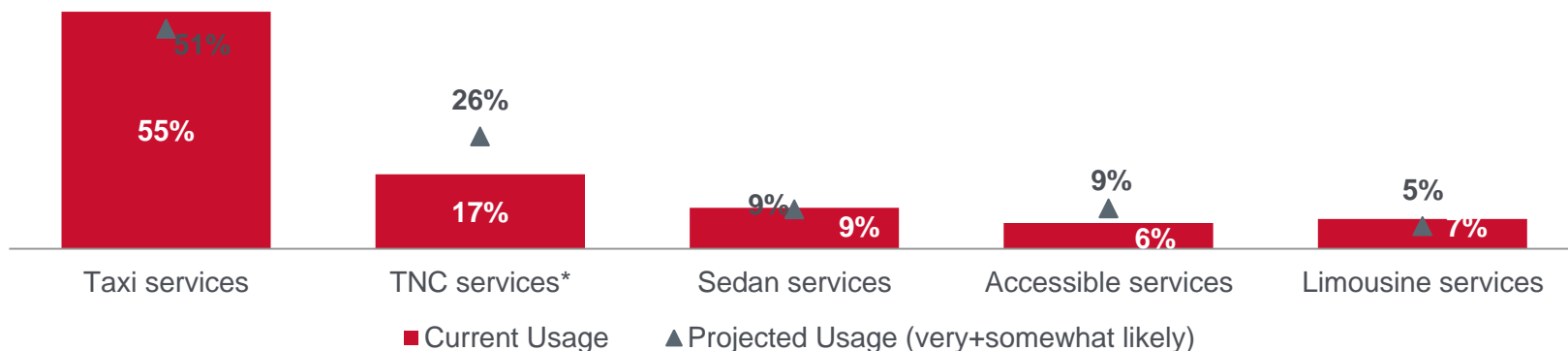
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians (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?

*changed to TNC services from Ridesharing services in 2017

Current vs. Projected Usage of Taxi Services (2017)



- Half (51%) of Calgarians are likely to use taxi services within the next 12 months, slightly lower than the current usage level (55%). The gap between current and projected usage (55%:51%) of taxi services is less wide than last year (62%:56%).
- The current and projected usage of sedans, limousines, and accessible taxi services is fairly constant over the next year.
- Based on projections, usage of TNC services is likely to increase over the next year (17% current:26% projected).

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

Base: All Calgarians (n=583). Don't know responses are not shown.

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?

*changed to TNC services from Ridesharing services in 2017

Purpose for Taxi Usage

- Multiple Responses Allowed -

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

- Taxi users mainly opt to use taxi services to attend a social function (58%, consistent with 59% in 2016), or to get to and from the airport (54%, identical to 2016).
- In addition, taxis are being used for business purposes (26%, similar to 27% in 2016), to get to work (20%, identical to 2016), or to get to medical appointments (14%, similar to 15% last year).
- Fewer taxi users are using taxi services to run errands (8%), or to get home (7%, an increase from last year).

In 2017, 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:

*New mention in 2017

Taxi Pick-Up Location

- Multiple Responses Allowed -

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

- The greatest proportion (39%) of taxi users indicate being picked up from the downtown core.
- The proportion of pick-ups across city quadrants is roughly equal between northwest, southwest and the airport region.
- A lesser proportion of taxi users got picked up from southeast or northeast within the past year.
- Taxi pick-up locations are consistent with the past year, except northeast.

In 2017, 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?*

Taxi Drop-Off Location

- Multiple Responses Allowed -

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

- The most common drop-off locations for taxi services are in the airport region (37%), and in the downtown core (30%), consistent with 2016.
- Fairly similar proportions of taxi users are being dropped off by taxis in the NW (25%), the SW (23%), the NE (23%) – consistent with 2016.
- A lesser proportion of taxi users got dropped off in southeast (15%).

In 2017, 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?*

Obtaining Taxi Services

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)
Phoning the taxi company's dispatch telephone number for immediate service	57%	63%	68%	68%
Phoning the taxi company's dispatch telephone number to pre-book an arranged time not for immediate service	62%	60%	51%	53%
Hailing or flagging a taxi	32%	36%	36%	37%
Booking a taxi online or via an App	12%	16%	22%	26%
Calling a taxi driver directly to arrange a ride	13%	12%	20%	21%
Using a designated taxi stand NOT located at a hotel	15%	15%	21%	20%
Using a hotel taxi stand	20%	16%	15%	11%

- Taxi users most commonly phone dispatchers to obtain a taxi, either by phoning dispatchers for immediate service (68%), or via pre-booking a taxi (53%).
- In addition, more than one-third (37%) of taxi-users report having hailed a cab this past year, 20% have used a designated taxi stand NOT located at a hotel, and 11% say they have used a hotel taxi stand (trending down since 2015).
- Not following the traditional dispatch route, 21% of taxi users are participants of "Code 8s" calling taxi drivers directly to arrange a ride (trending up since 2016).
- There has been a steady upward trend of taxi users who obtained taxi services via online bookings or a taxi App since 2015 (26% in 2017, 22% in 2016, 16% in 2015, 12% in 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.

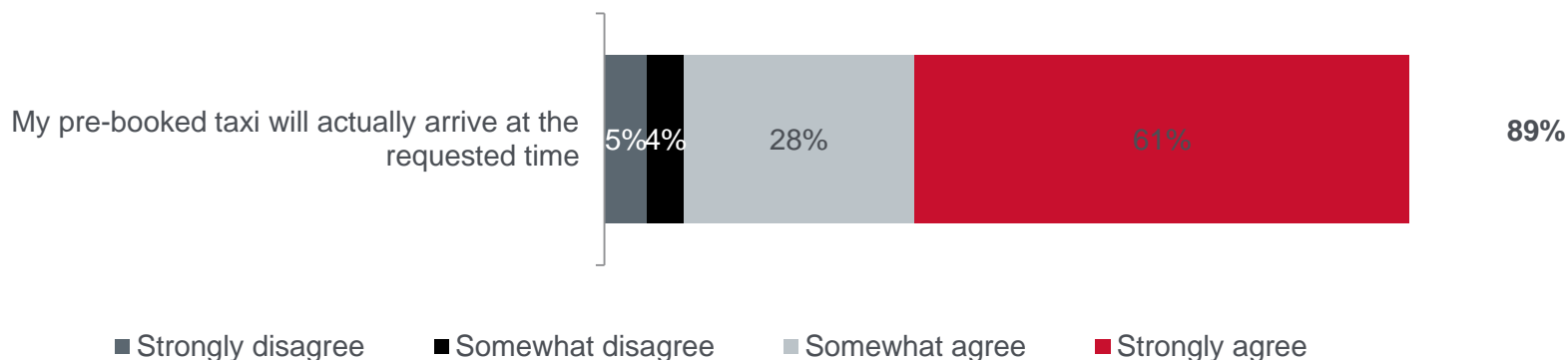
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

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?

Pre-booking Services

Total Agree



- 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 (61%) who strongly agree.
- Strong agreement is higher among those who:
 - Used a taxi in the past year to go to the airport.
 - Are overall satisfied with the taxi services in Calgary

In 2017, 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 (n=177)

Don't know responses are not shown

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

Online Booking or App Usage Details

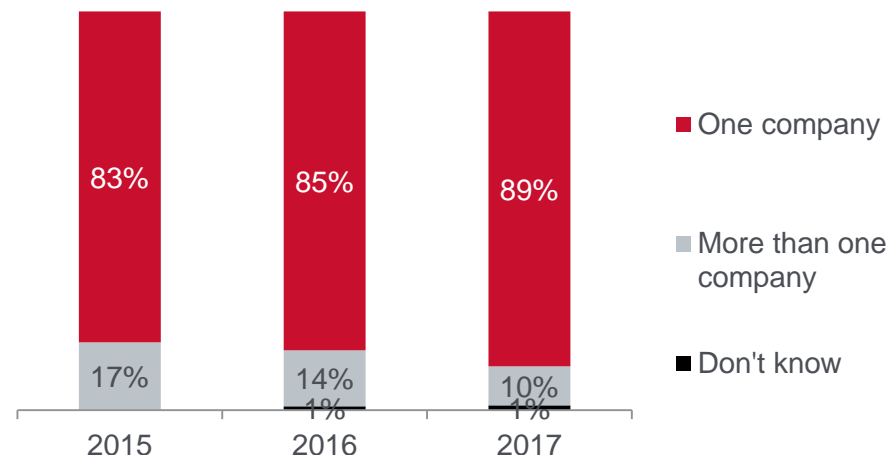
Among Taxi Users who Used Online Booking/App

Company for which Online App Used - Multiple Responses Allowed -

	2015	2016	2017
Checker	45%	40%	49%
Associated	29%	47%	34%
Uber	-	2%	9%
Mayfair	2%	7%	8%
Calgary United Cabs	14%	10%	7%
#Taxi	7%	3%	4%
Other	3%	1%	1%
Don't know / Refused	8%	12%	12%

- Nearly half (49%) of those who booked taxis online/ via App used Checker's system, one-third (34%) used Associated's system.
- Fewer used Uber's online system (9%), Mayfair's online system (8%), Calgary United Cabs' online system (7%), #Taxi (4%).

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



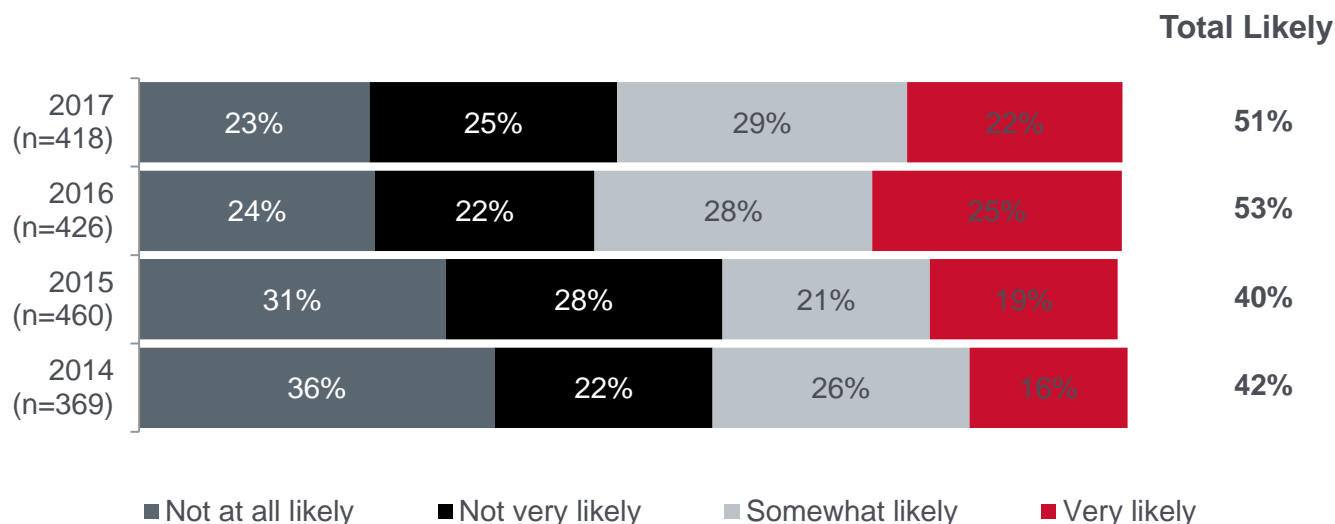
- The majority (89%) of Calgarians who booked a taxi online/via an App indicate they booked it only with one company, consistent with 2016.
- However, 10% of this group are booking taxis online with more than one company, trending downward since 2016.

In 2017, 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 (2017, n=75; 2016, n=77; 2015, n=61)

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

Likelihood to Use Online-Enabled Booking System



- One-quarter (26%) of taxi users have obtained taxi services via online booking systems or an App this past year.
- In contrast, half (51%) 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 (consistent with 2016), including two-in-five (22%) who indicate they are very likely to use an online-enabled booking system.
- Strong likelihood to use an online-enabled taxi booking system in the next year is higher among those aged 18 to 54 years, who live in northwest or southwest Calgary, are heavy taxi users and those who use taxis for business.

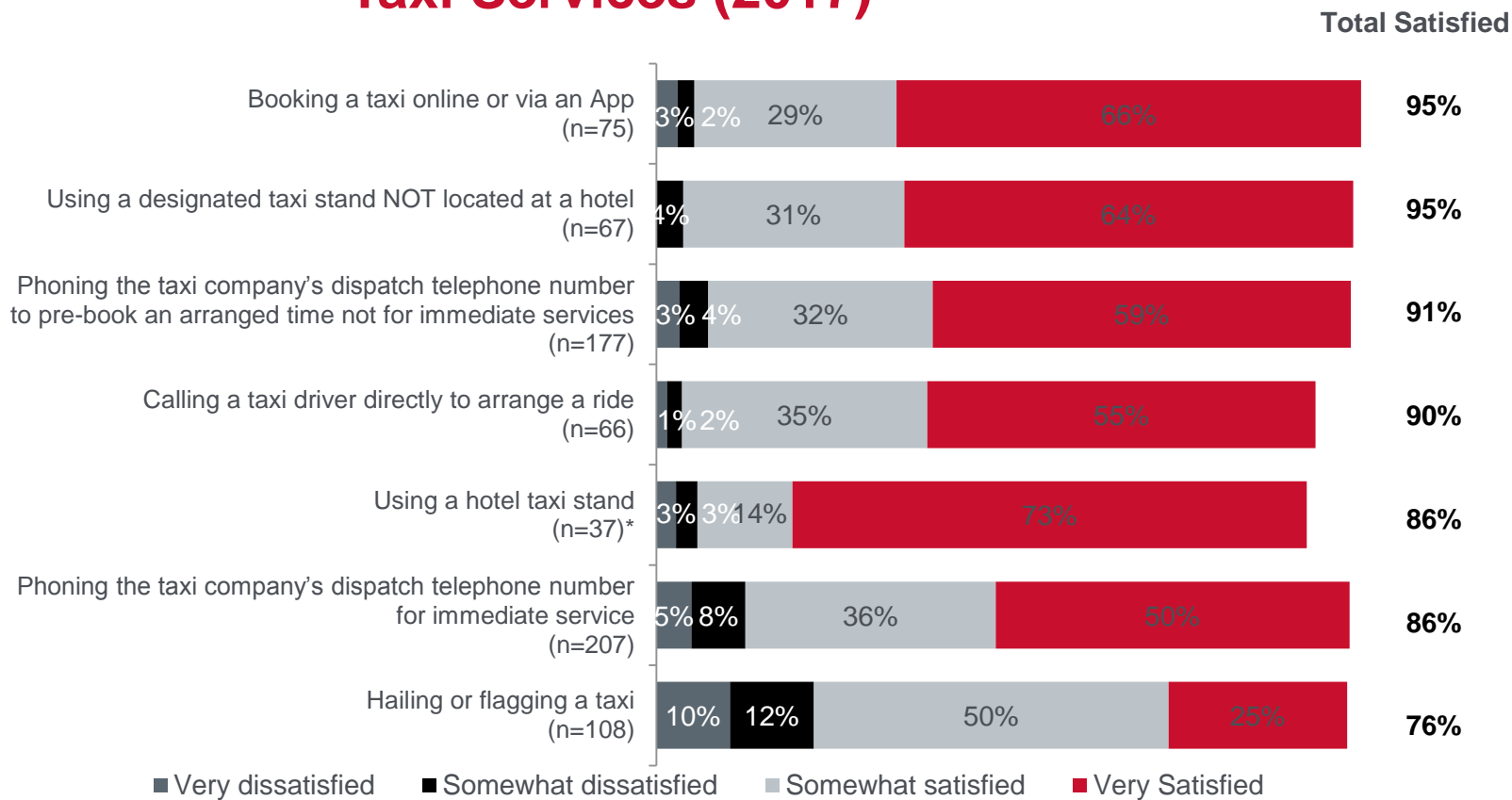
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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 Method Used to Obtain Taxi Services (2017)



- The majority of taxi users are satisfied with all methods of obtaining a taxi. Satisfaction is high when booking a taxi online (95%) or obtaining taxi services at a designated taxi stand not located at a hotel (95%). Further, 91% of taxi users are satisfied with pre-booking taxi services with dispatchers or calling a taxi driver directly (90%).

In 2017, 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

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
Booking a taxi online or via an App	82%	92%	85%	95%
Using a designated taxi stand NOT located at a hotel	97%	92%	92%	95%
Phoning the taxi company's dispatch telephone number to pre-book an arranged time not for immediate services	88%	90%	88%	91%
Calling a taxi driver directly to arrange a ride	92%	91%	86%	90%
Using a hotel taxi stand	97%	94%	88%	86%
Phoning the taxi company's dispatch telephone number for immediate service	70%	81%	84%	86%
Hailing or flagging a taxi	76%	73%	74%	76%

- Satisfaction ratings are consistent with 2016.
- Satisfaction with using a hotel taxi stand is trending down since 2015 and with phoning dispatchers for immediate service is trending upward since 2015.

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

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

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

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

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

- Strong satisfaction with using a hotel stand has increased in 2017.
- Strong satisfaction with the following is trending up:
 - Booking a taxi online or via an App (trending up since 2016)
 - Phoning the taxi dispatch number for immediate service (trending up since 2015)

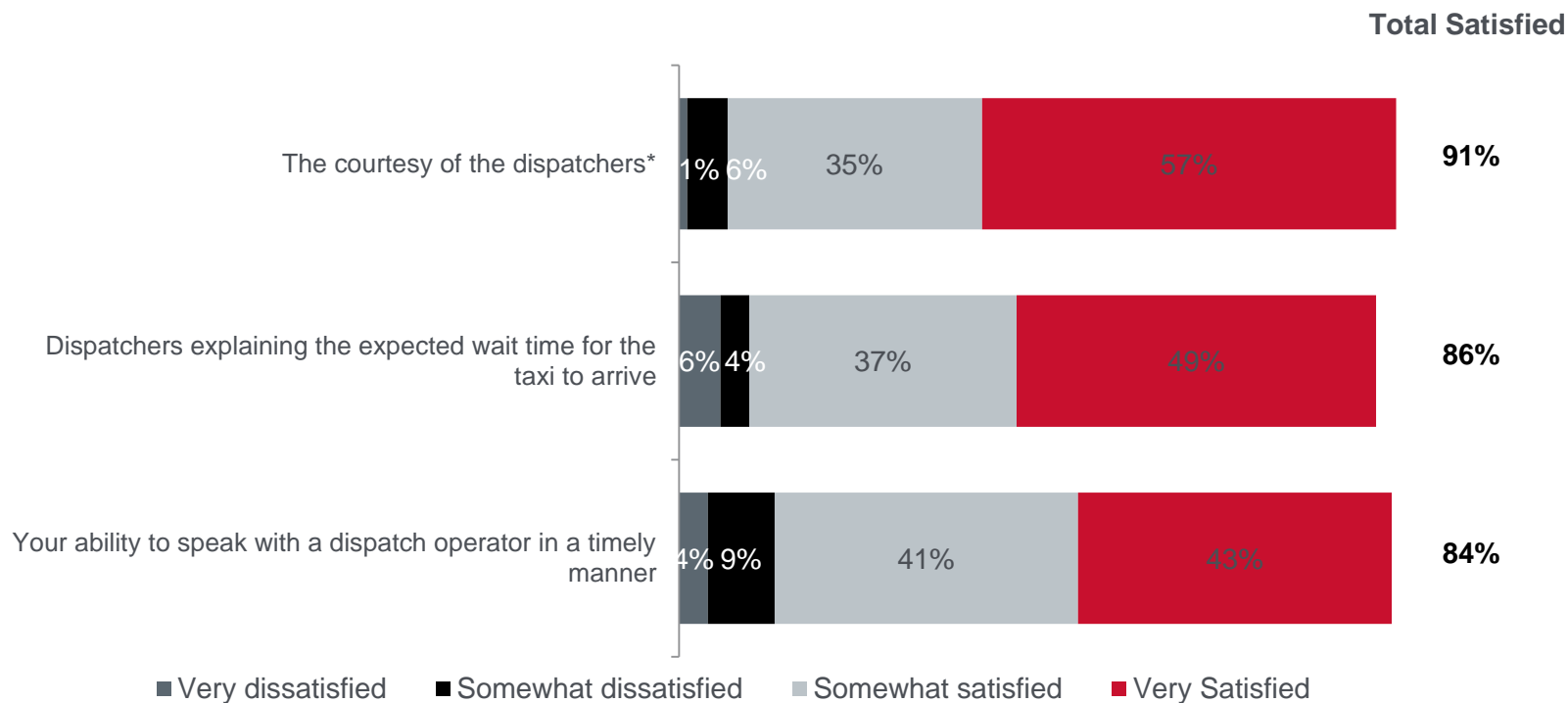
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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

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

Dispatchers

Satisfaction with Dispatchers (2017)



- The majority of taxi users who phoned dispatch within the past year are satisfied with the courtesy of dispatchers (91%), with dispatchers explaining the expected wait time for taxis to arrive (86%) and with their ability to speak with a dispatcher in a timely manner (84%).
- The intensity of satisfaction with all parameters is high (two-in-five or more).

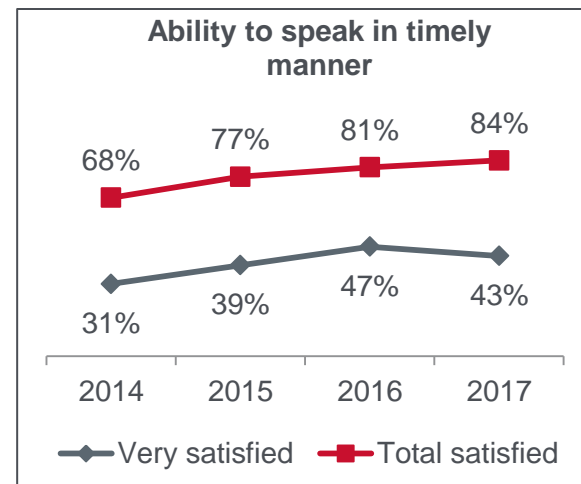
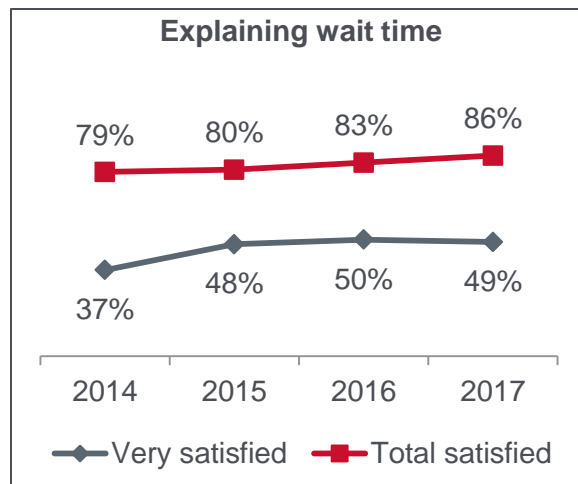
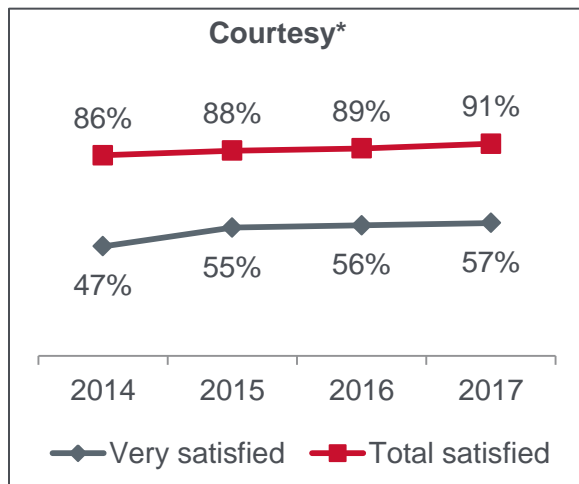
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgarians who phoned the company's dispatch telephone number within the past year (n=270)

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
*changed to "courtesy" from "courteousness" in 2017

Satisfaction with Dispatchers (Trends Over Time)



- Satisfaction with all parameters is trending upward since 2014.
- The intensity of satisfaction with all parameters is fairly consistent over time.

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

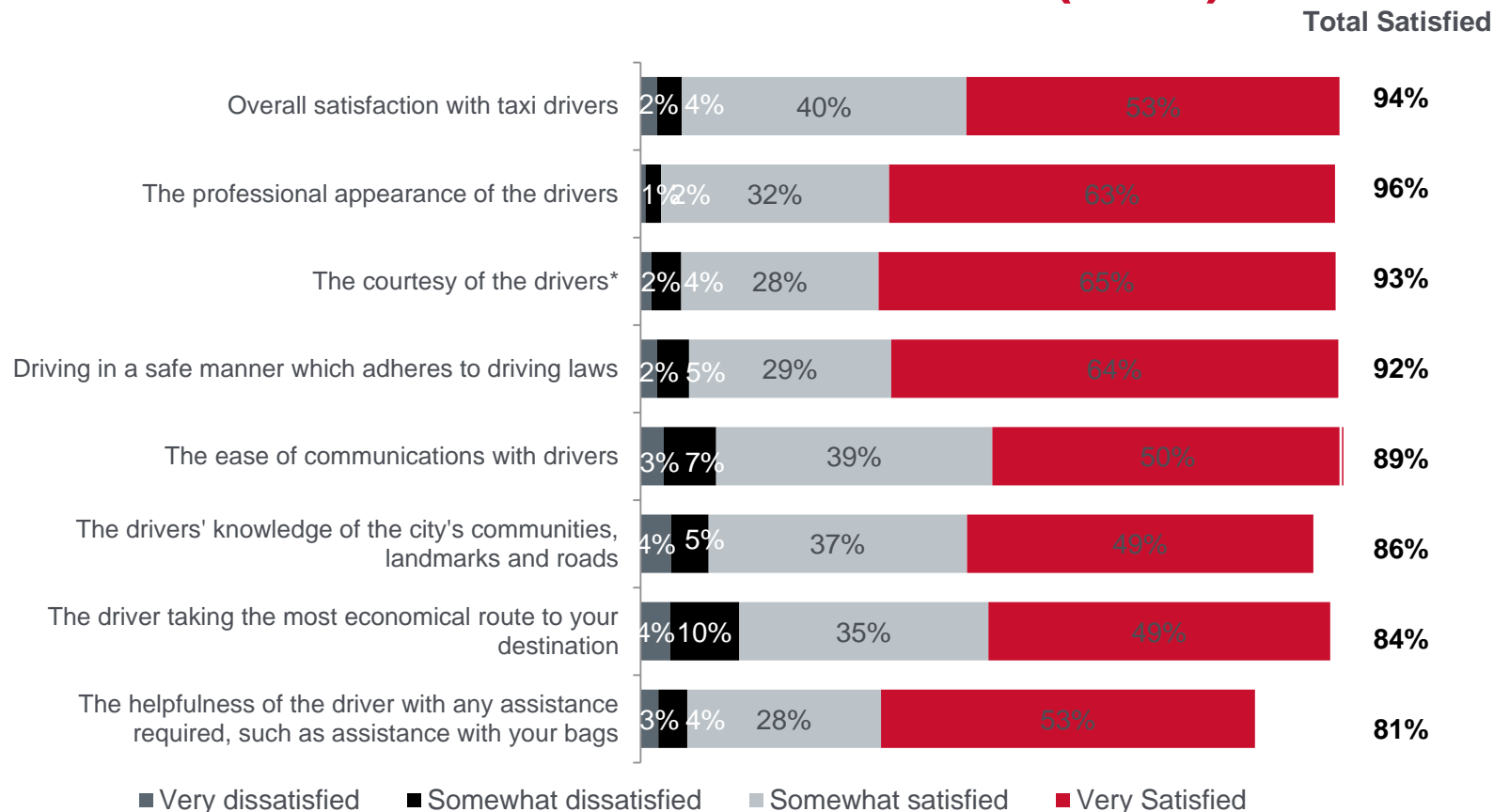
Base: Calgarians who phoned the company's dispatch telephone number within the past year (2017, n=270; 2016, n=310; 2015, n=355; 2014, n=267)

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

*changed to "courtesy" from "courteousness" in 2017

Drivers

Satisfaction with Drivers (2017)



- A high majority (94%) of taxi users are satisfied overall with taxi drivers.
- More than 9-in-10 taxi users are satisfied with the professional appearance of drivers (96%), the courtesy of drivers (93%) and safe manner in which they drive (92%).
- Further, a sizeable majority is also satisfied with the ease of communication with drivers (89%), with drivers' knowledge of the city (86%), drivers taking the most economical routes (84%), and with the helpfulness of the driver providing assistance (81%).

In 2017, 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=314)

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:

*changed to "courtesy" from "courteousness" in 2017

Satisfaction with Drivers (Trends Over Time)

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

- Satisfaction with the professional appearance of the drivers has increased in 2017.
- Satisfaction with the driver taking the most economical route to the destination is trending down since 2016.

In 2017, 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:

*changed to "courtesy" from "courteousness" in 2017

Satisfaction with Drivers (Trends Over Time)

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

- Strong satisfaction with the courtesy of drivers has increased in 2017.

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

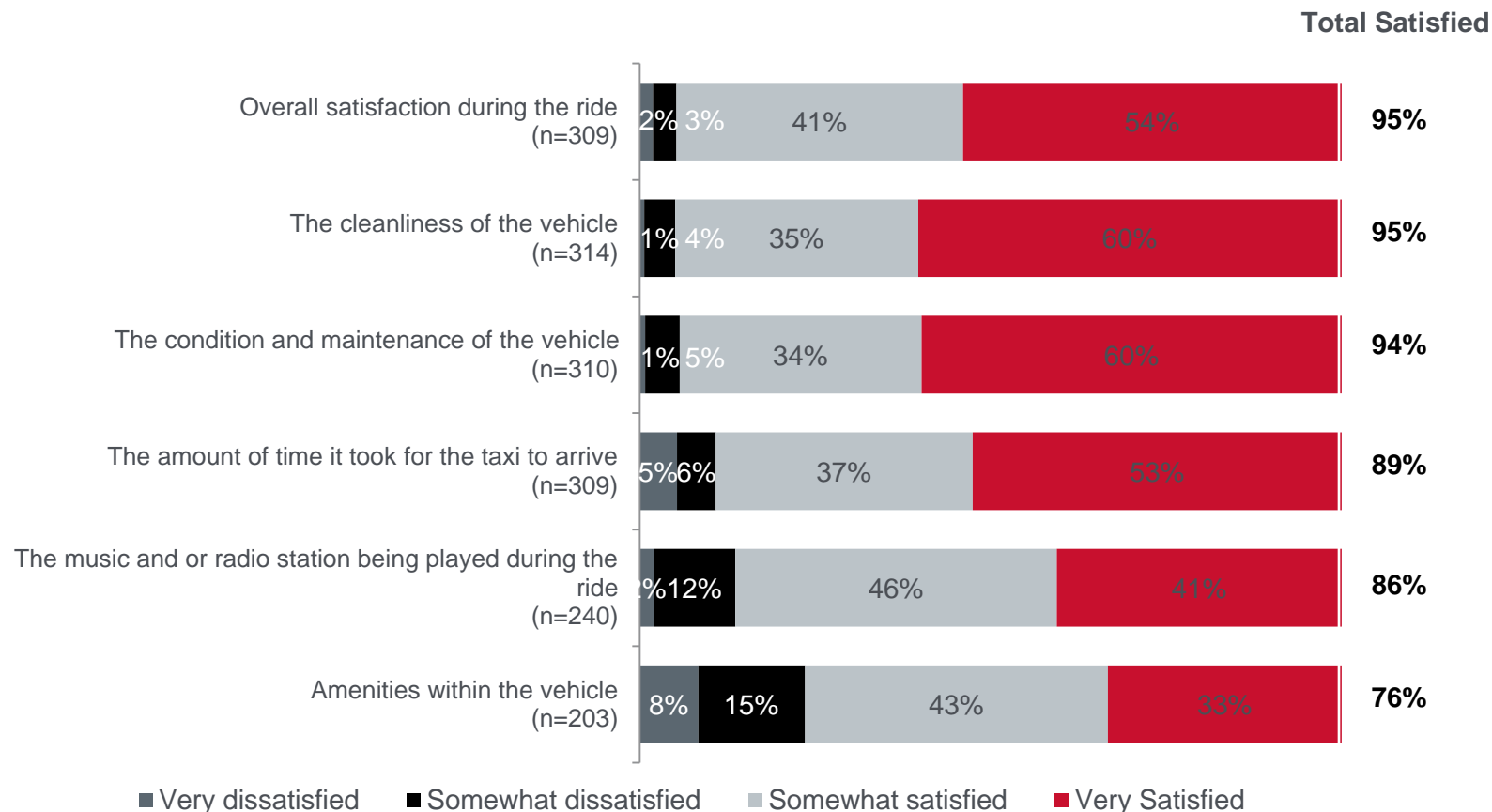
Base: Calgarians who have used taxi services or accessible taxi services within the past year

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:

*changed to "courtesy" from "courteousness" in 2017

Experiences During the Ride

Satisfaction with Experiences During the Ride (2017)



- 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 (95%), with the cleanliness of the vehicle (95%) and with the condition and maintenance of the vehicle (94%).
- Further, 89% are satisfied with the amount of time it took for their taxi to arrive and 86% are satisfied with radio stations played during the ride. As well, 76% are satisfied with the amenities in the vehicles.

In 2017, 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)

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

-
- Satisfaction levels are consistent with 2016.

In 2017, 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
Overall satisfaction during the ride	47%	57%	53%	54%
The cleanliness of the vehicle	56%	61%	57%	60%
The condition and maintenance of the vehicle	57%	60%	53%	60%
The amount of time it took for the taxi to arrive	41%	47%	52%	53%
The music and or radio station being played during the ride	38%	40%	38%	41%
Amenities within the vehicle	30%	33%	34%	33%

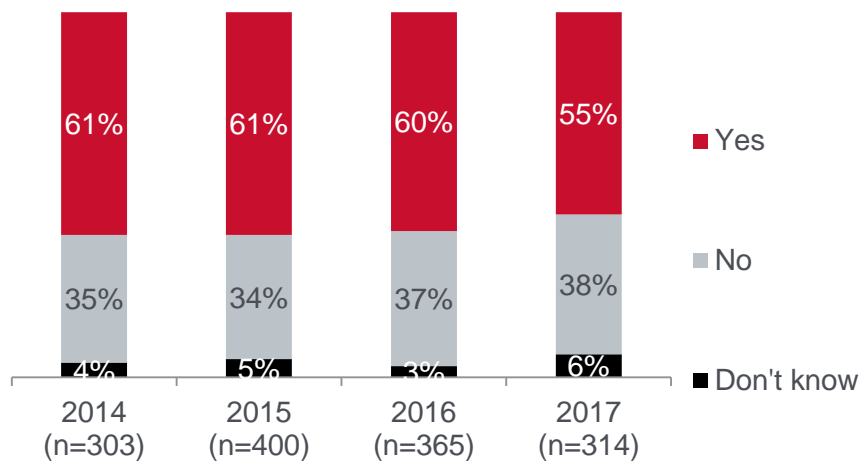
- Strong satisfaction is consistent with 2016.
- Strong satisfaction with the amount of time it took the taxi to arrive is trending up since 2016.

In 2017, 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



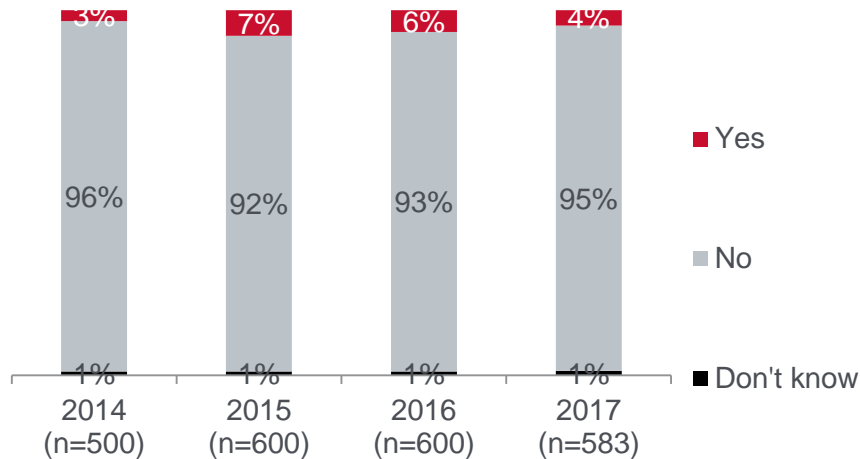
- More than half (55%) of taxi users indicate that their driver used a cell phone or mobile device during their ride, consistent with previous years.
- Heavy taxi users are more likely to report their driver using a cell phone/mobile device during their ride.

In 2017, 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 2016.
- Reasons for refusal include disagreements with the length of the requested ride, already booked for someone else and being too intoxicated.

In 2017, 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

"Because we wanted to use our access card and 3 cabs wouldn't take it."

"The distance was too short."

"They didn't believe that I have the money."

"Some else ordered the cab before me."

"The fare for the airport to where I was going was not great enough- they were waiting for a bigger trip."

"I was just refused two nights ago for not knowing the destination and too short of a trip."

"Because I was paying with debit and the taxi driver wanted only cash."

"We had a dog and he would not take us."

"Short trip, only 15km."

"Never showed up."

"Had someone else they were going to pick up."

"Maybe they thought I was looking like a homeless."

"Driver said coupon was invalid even though it was valid."

"Several times because the fare wasn't enough, the fare was going too far. The attitude of taxi drivers changes during stampedes and other bigger events."

"They didn't show up."

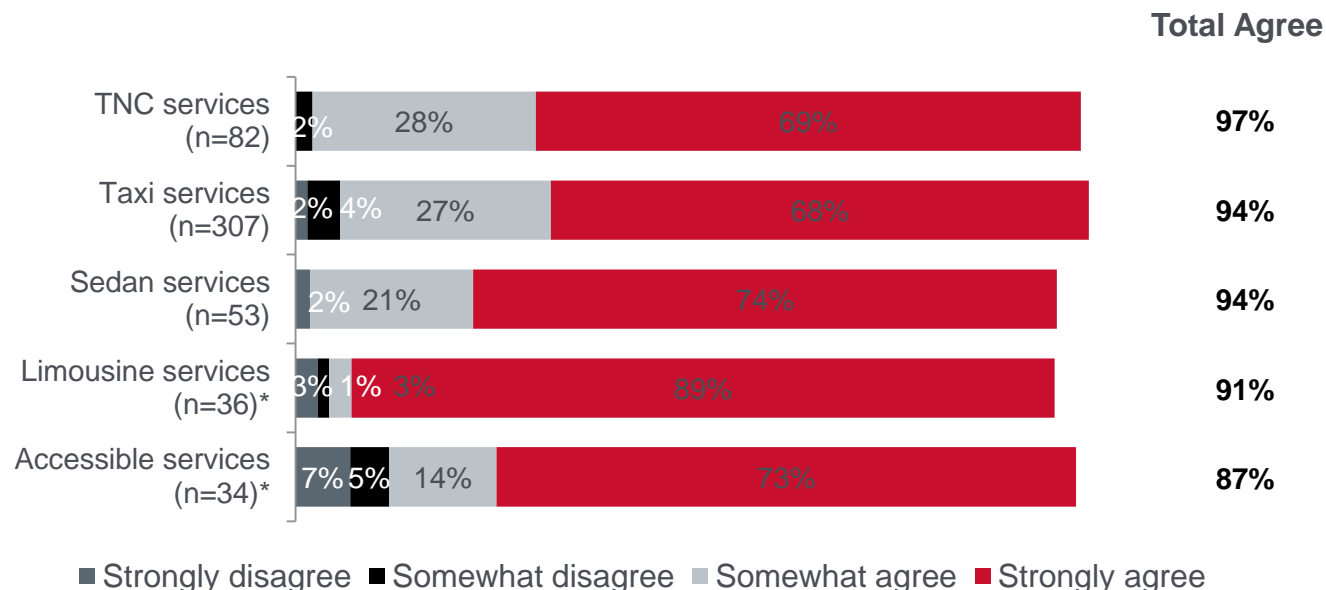
"He had somewhere else to go. What happened was that we approached the cab and he said he is already waiting for someone else."

"Not knowledgeable about the route and can't help."

"The reason was my son was drinking and they would not take an intoxicated person."

In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis
Q22. To the best of your recollection, for what reasons did the driver refuse to provide you with a ride?
Base: Calgarians who have been refused a ride during the past year (n=21)

Safety During the Ride (2017)



**Small sample, interpret with caution*

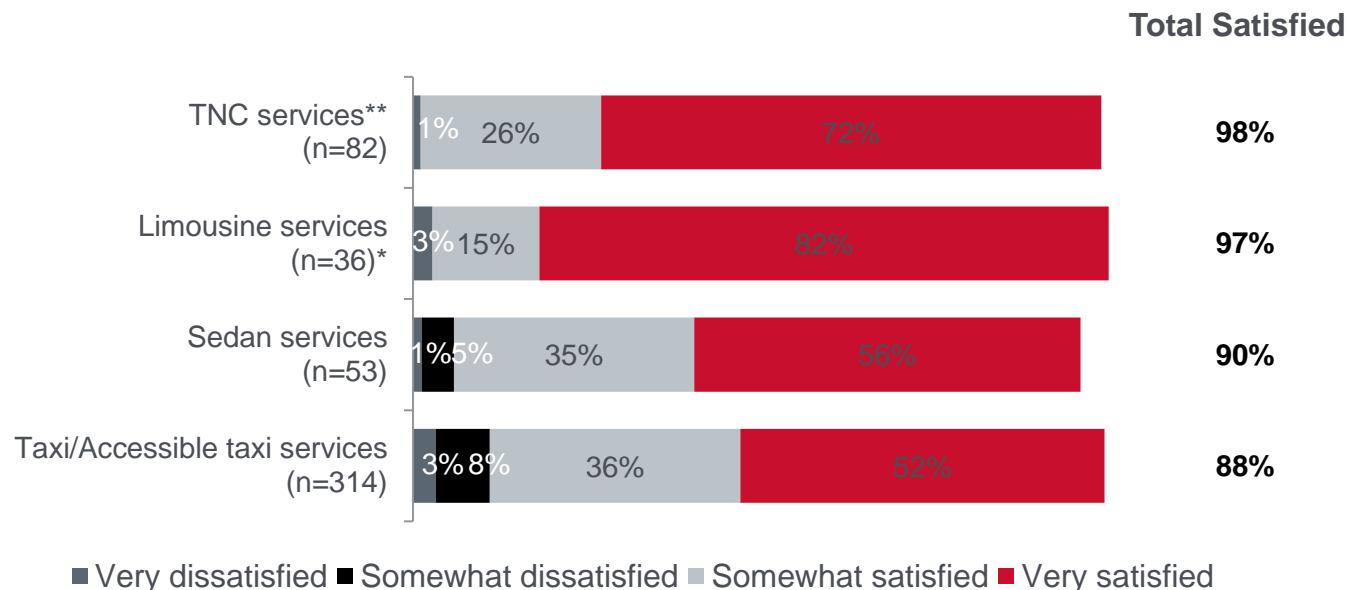
- The majority of users of vehicle-for-hire services agree that they felt safe during their last ride.
- The strength of agreement is also high (range of 68% to 89%).

In 2017, 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

A close-up photograph of several orange and yellow tulips in bloom, with green leaves and stems visible. The background is slightly blurred, showing more flowers.

Overall Satisfaction with Services

Overall Satisfaction with Services (2017)



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

- Satisfaction is strong for all types of “for hire” transportation services.
- Almost all (98%) of users of TNC services are satisfied with the services, including three-quarters (72%) who are very satisfied.
- A high majority of limousine customers (97%), sedan customers (90%), and taxi/accessible taxi customers (88%) are satisfied with their experiences over the past year.

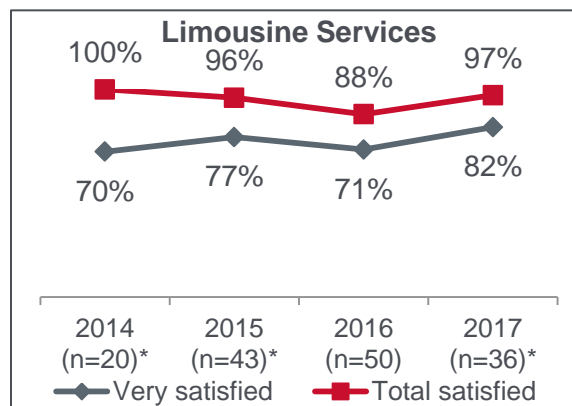
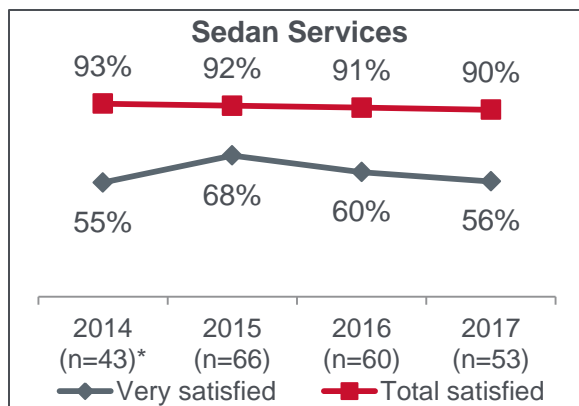
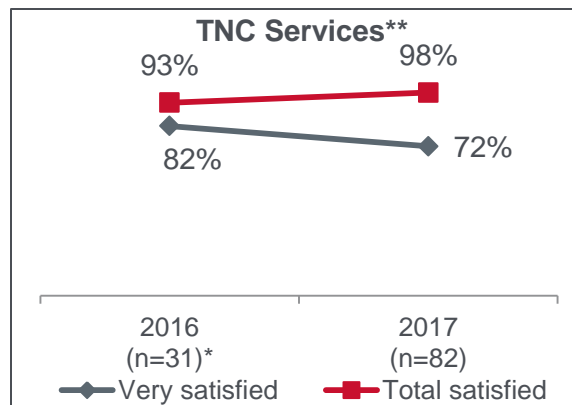
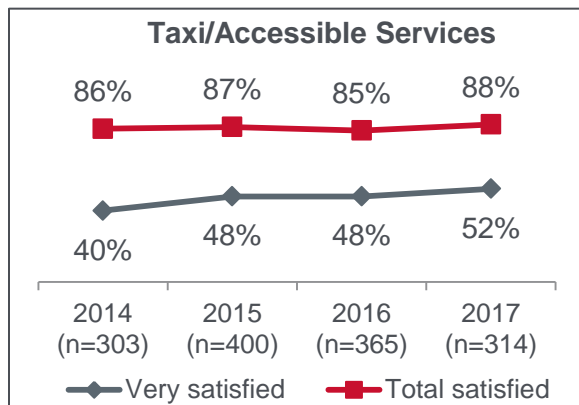
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

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 services you received in Calgary over the past year? / Q25. Overall, how satisfied or dissatisfied are you with the limousine services you received in Calgary over the past year? Q25a. Overall, how satisfied or dissatisfied are you with the TNC services you received in Calgary over the past year?

**changed to TNC services from Ridesharing services in 2017

Overall Satisfaction with Services (Trends Over Time)



- Satisfaction with all types of transportation services is consistent with 2016.
- Strong satisfaction with sedan services is trending down since 2016.

***Small sample, interpret with caution**

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

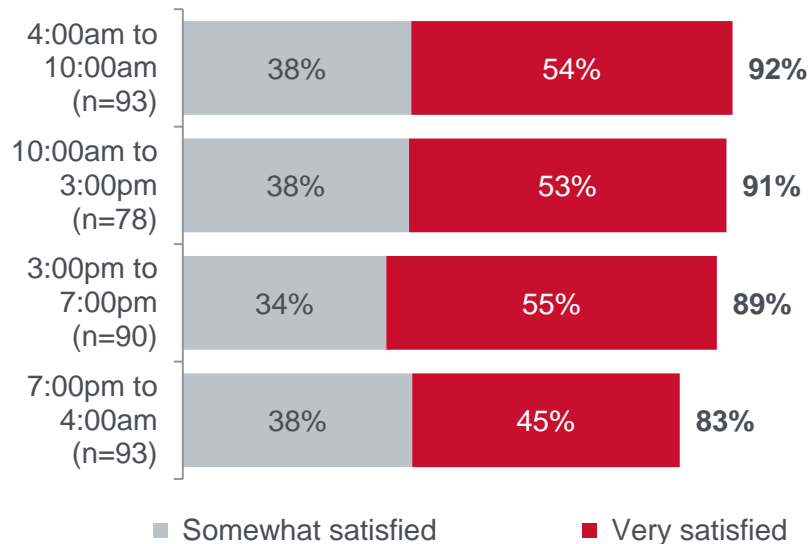
Base: Users of respective vehicle-for-hire.

Q23. Overall, how satisfied or dissatisfied are you with the taxi services you received in Calgary over the past year? / Q24. Overall, how satisfied or dissatisfied are you with the sedan services you received in Calgary over the past year? / Q25. Overall, how satisfied or dissatisfied are you with the limousine services you received in Calgary over the past year? Q25a. Overall, how satisfied or dissatisfied are you with the TNC services you received in Calgary over the past year?

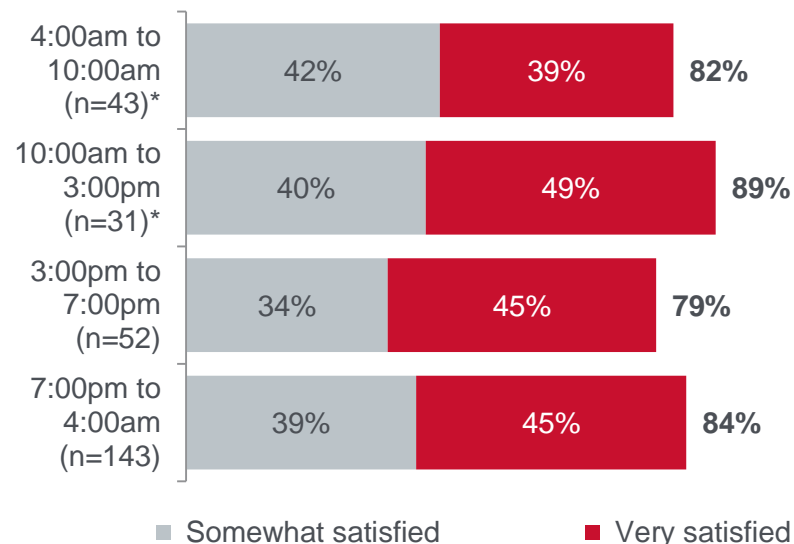
**changed to TNC services from Ridesharing services in 2017

Overall Satisfaction with Taxi Services – by Timing of Use

Weekday Users



Weekend Users



**Small sample, interpret with caution*

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

Base: Users of taxi or accessible taxi services

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

Factors Influencing Overall Satisfaction with Taxi Services

Explanation of Key Driver Analysis

Purpose:

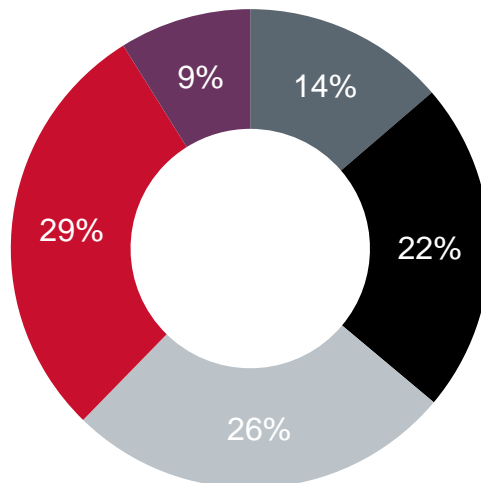
- Have the survey results explain more than ‘satisfaction’ scores
- Identify key strengths and opportunities for improvement

Methodology:

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

Key Drivers of Satisfaction with Taxi Services

- Value for money
- Overall Satisfaction with taxi drivers



- Ability to speak with a dispatch operator in a timely manner
- Dispatchers explaining the expected wait time for the taxi to arrive
- Overall Satisfaction during the ride

Overall Satisfaction with taxi drivers considering experiences with the driver

Importance

The helpfulness of the driver with any assistance required, such as assistance with your bags	29%
The courtesy of drivers	21%
Driving in a safe manner which adheres to driving laws	14%
The driver taking the most economical route to your destination	13%
The ease of communications with drivers	12%
The drivers' knowledge of the city's communities, landmarks and roads	11%

Overall Satisfaction during the ride

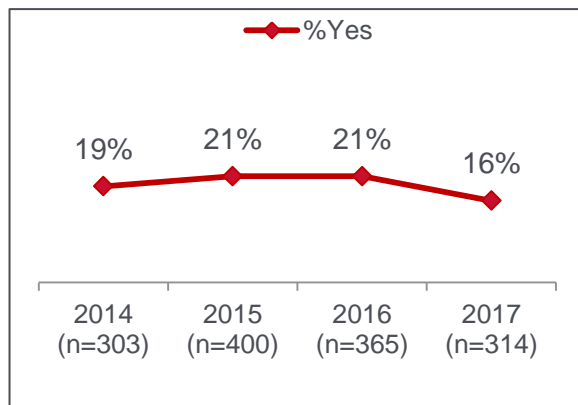
Importance

The cleanliness of the vehicle	31%
The amount of time it took for the taxi to arrive	26%
The condition and maintenance of the vehicle	22%
Amenities within the vehicle	21%

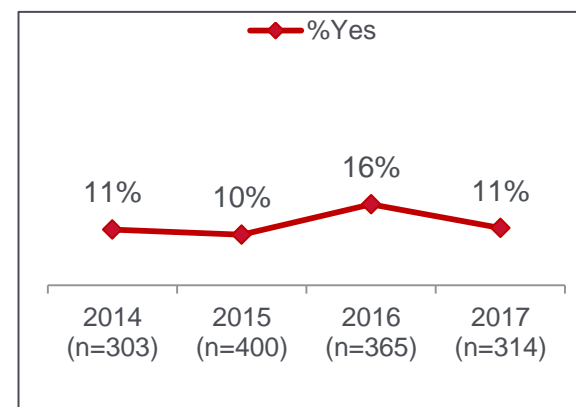
Payment and Value

Payment Issues

The debit/credit card machine being broken



The driver not having the correct cash change for your payment

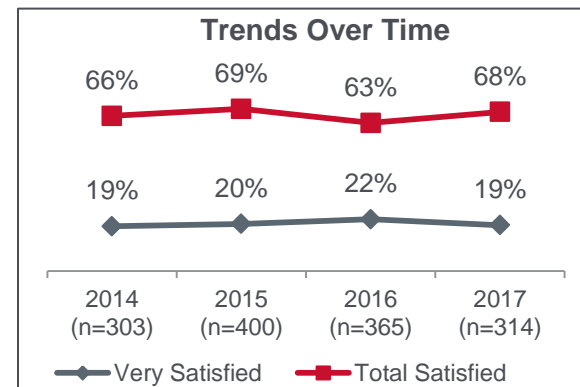
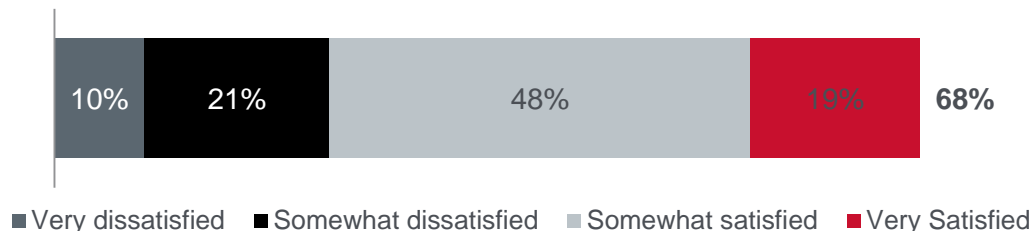


- Approximately one-in-six taxi users (16%, consistent with 2016) report that they have experienced issues with the debit/credit machine being broken.
- One-in-ten taxi users (11%, consistent with 2016) report that the driver did not have the correct change for their payment.

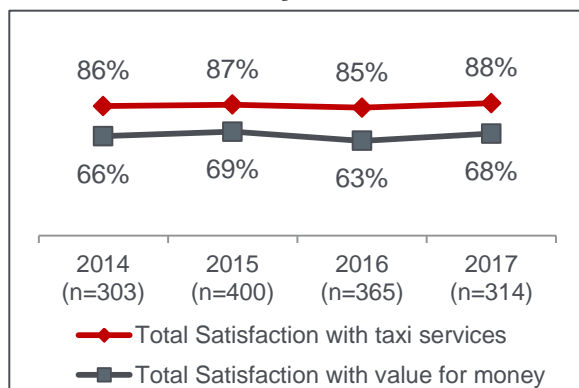
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis
Base: Calgarians who have used taxi services or accessible taxi services within the past year
Q27. During the past year, when paying for your taxi ride in Calgary, have you experienced:

Satisfaction with Value for Money with Taxi Services

Overall Satisfaction with value for money



Value for money vs. satisfaction



- Seven-in-ten (68%) taxi users are satisfied with the value for money they received from their taxi rides this past year, consistent with previous years.
- 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.

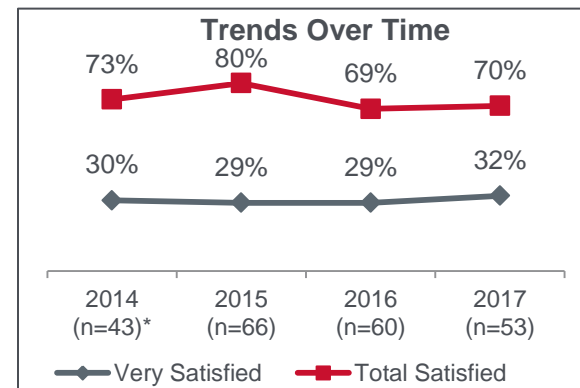
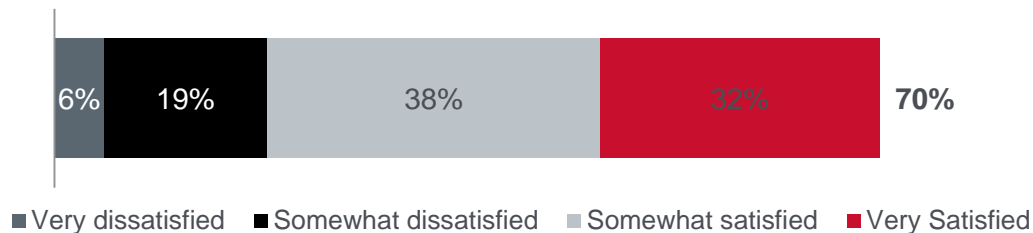
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgaryans who have used taxi services or accessible taxi services within the past year (n=314) / Don't know responses are not shown

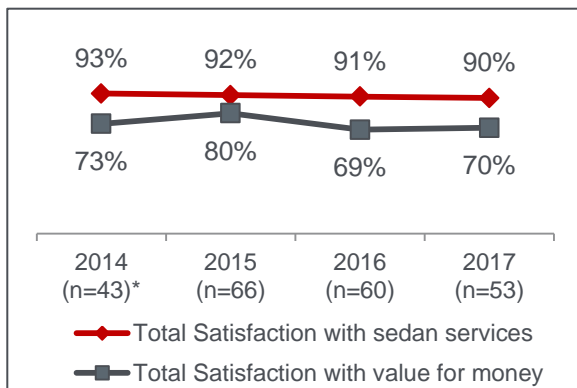
Q28. Thinking of the price you paid for the taxi rides you have taken within the past year, how satisfied or dissatisfied would you say you are with the value for money that you received? Q23. Overall, how satisfied or dissatisfied are you with the taxi services you received in Calgary over the past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

Satisfaction with Value for Money with Sedans

Overall Satisfaction with value for money



Value for money vs. satisfaction



- Seven-in-ten (70%) sedan users are satisfied with the value for money that they received, consistent with 2016.
- The intensity of satisfaction with value for money for sedan rides has remained consistent since previous years.

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

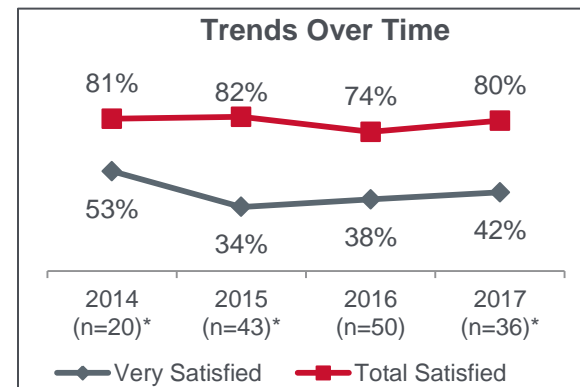
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgarians who have used sedan services within the past year (n=53) / Don't know responses are not shown

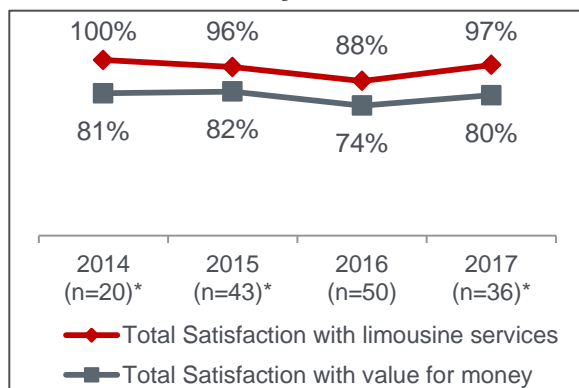
Q29. Thinking of the price you paid for the sedan rides you have taken within the past year, how satisfied or dissatisfied would you say you are with the value for money that you received? Q24. Overall, how satisfied or dissatisfied are you with the sedan services you received in Calgary over the past year?

Satisfaction with Value for Money with Limousine Services

Overall Satisfaction with value for money



Value for money vs. satisfaction



- Four-in-five (80%) limousine users are satisfied with the value for money that they received, consistent with 2016. Strong satisfaction is trending up since 2016.
- In comparison with the value for money paid for taxi or sedan services, limousine users express the highest satisfaction levels for the value for money paid.

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

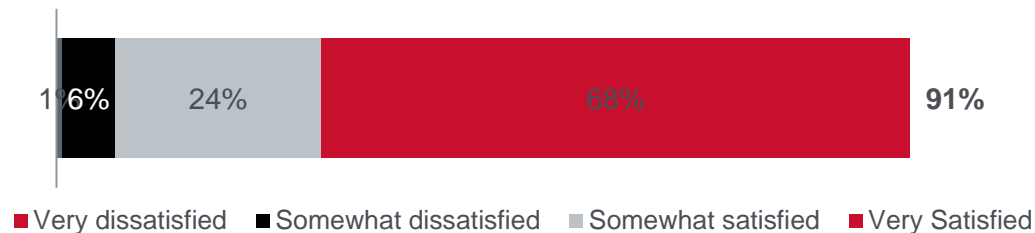
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: Calgarians who have used limousine services within the past year (n=36)* / Don't know responses are not shown

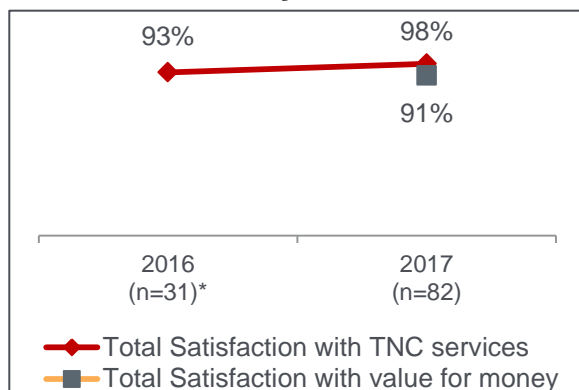
Q30. Thinking of the price you paid for the limousine rides you have taken within the past year, how satisfied or dissatisfied would you say you are with the value for money that you received? Q25. Overall, how satisfied or dissatisfied are you with the limousine services you received in Calgary over 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 (91%) TNC users are satisfied with the value for money that they received.
- The intensity of satisfaction with value for money is very close to overall satisfaction with TNC services.

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

In 2017, 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=82) / Don't know responses are not shown

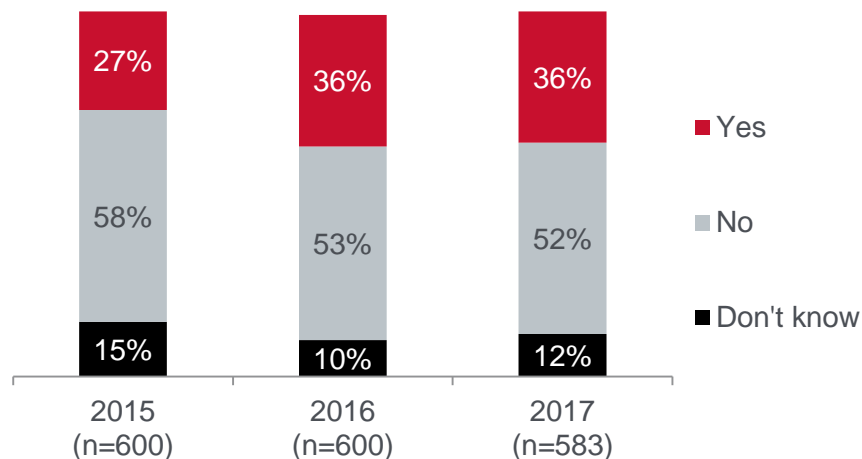
Q30A. Thinking of the price you paid for the TNC rides you have taken within the past year, how satisfied or dissatisfied would you say you are with the value for money that you received? Q25a. Overall, how satisfied or dissatisfied are you with the TNC services you received in Calgary over the past year?

New question in 2017

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, 36% of the general public recall having seen the bumper stickers (identical to 2016).

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

	2015 (n=160)	2016 (n=209)	2017 (n=194)
The taxi company	16%	21%	23%
311 (City of Calgary)	34%	17%	17%
There was a number to call	2%	14%	6%
Other	1%	1%	2%
Don't know / Refused	48%	46%	53%

Base: Calgarians aware of bumper sticker

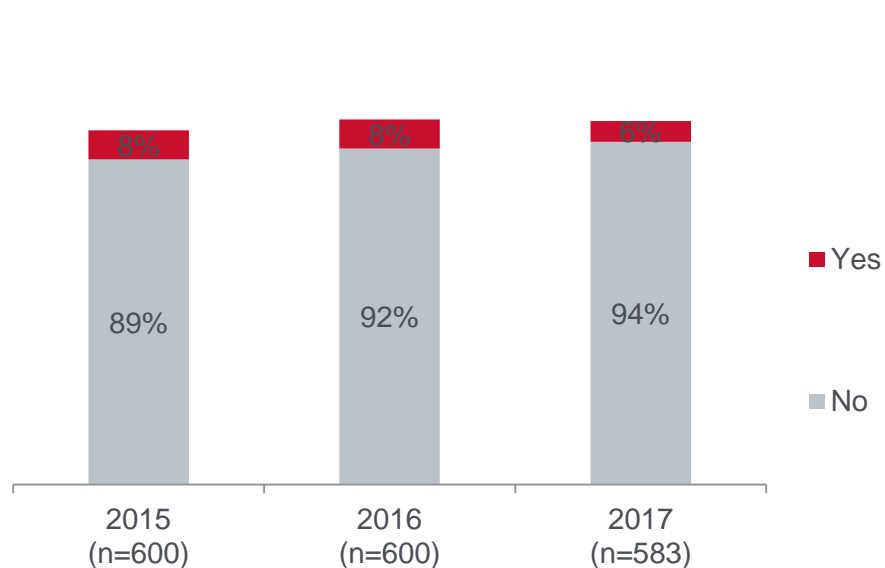
- One-in-six (17%) of those who recall the bumper sticker correctly indicate that it informed people to contact The City of Calgary via 311 – identical to 2016.
- 23% incorrectly report that the bumper sticker informed people to call the taxi company.

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

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

Compliments about Taxi Services

Made a compliment?



- A total of 6% Calgarians indicate that they have made a compliment about taxi services this past year, similar to 2016.

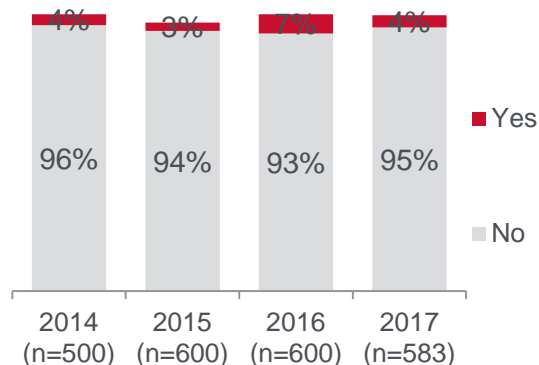
In 2017, current and former drivers of taxis, limousines or TNC are excluded from the analysis

Base: All Calgarians / Don't know responses are not shown

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

Complaints about Taxi Services

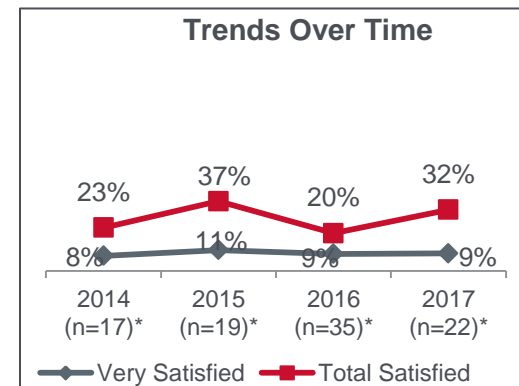
Made a complaint?



To whom?*

	2014 (n=17)*	2015 (n=19)*	2016 (n=35)*	2017 (n=22)*
To the taxi company directly	94%	81%	67%	83%
To The City of Calgary / 3-1-1 / Taxi Commission / Livery Transport Services	8%	16%	8%	12%
To the driver	-	9%	5%	4%
Other	6%	-	21%	12%

Satisfaction with Complaint Resolution**



Reasons for not making a complaint***

Reasons for not making a complaint***	2014 (n=480)	2015 (n=564)	2016 (n=564)	2017 (n=559)
Didn't have anything to complain about	60%	70%	66%	70%
Did not use a taxi	17%	13%	20%	21%
Didn't think it would make a difference/didn't bother	13%	11%	9%	4%
Didn't have the time / Takes too much time to do	3%	2%	3%	2%
None/no reason	-	-	-	2%

- A total of 4% of Calgarians indicate that they have made a complaint about taxi services this past year, consistent with 2016.
- Most Calgarians who did not make a complaint indicate they did not have any complaints (70%) or did not use a taxi (21%).
- Among the few taxi users who did make a complaint about taxi services in Calgary within the past year (**caution: small sample size**), the majority (83%) indicate that they made the complaint to the taxi company directly. Overall, 12% of those with complaints contacted The City (311) to file a complaint this past year.
- Satisfaction with complaint resolution (32%) has returned to 2015 levels; however due to a **small sample size**, these results are directional in nature.

***Small sample, interpret with caution**

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

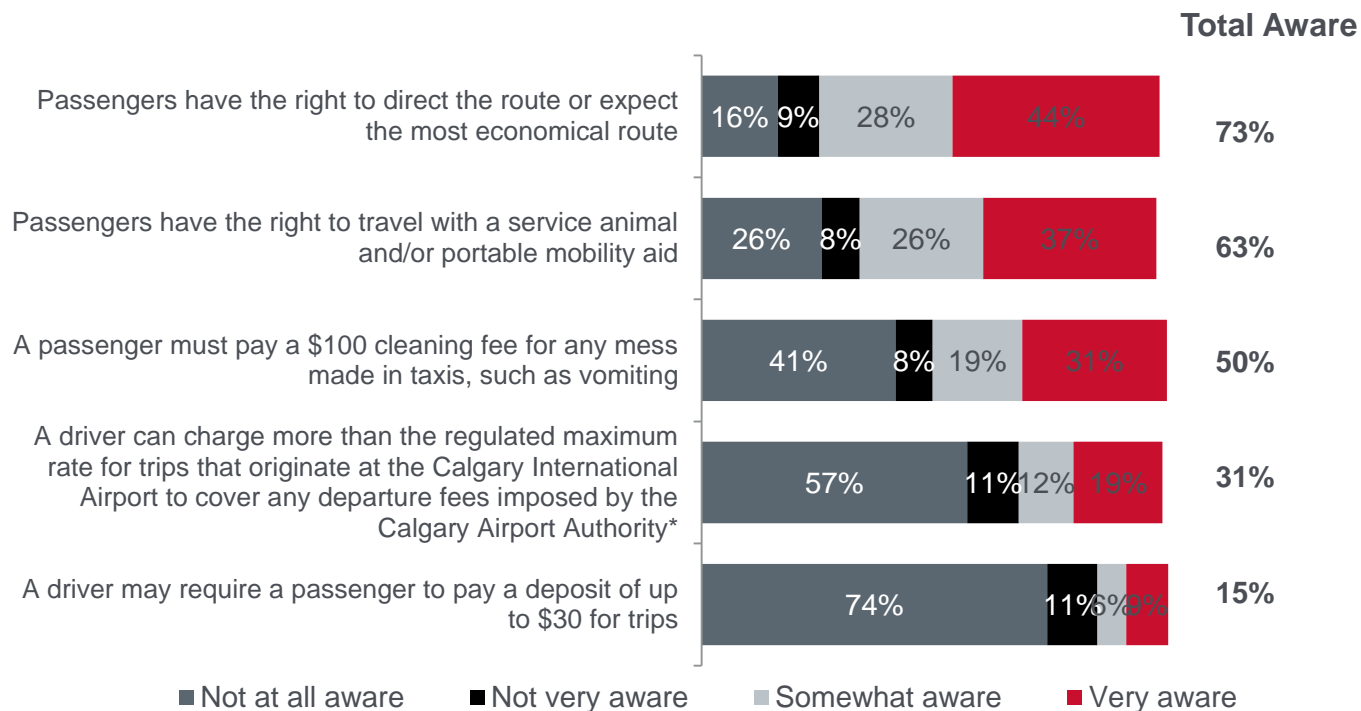
Base: All Calgarians / Don't know responses are not shown/**Base: Calgarians who made a complaint about taxi services in Calgary within the past year

***Base: Calgarians who have not made a complaint about taxi services in the past year/ Mentions less than 2% for 2017 are not shown.

Q33B. Within the past year, have you made a complaint about taxi services in Calgary? Q37 - Why did you not make a complaint? Q38. To whom did you make the complaint? Q36. To what extent were you satisfied or dissatisfied with the outcome or resolution to your complaint? Would you say you were:

Awareness of Rights

Awareness of Rights (2017)



- The majority of Calgarians are aware that passengers have the right to direct the route or expect the most economical route (73%) and to travel with a service animal and/or portable mobility aid (63%).
- Half (50%) of Calgarians are aware that a passenger must pay a \$100 cleaning fee for any mess made in a taxi.
- A considerably lower proportion of Calgarians are aware that drivers may charge airport departure fees (31%) and that a driver may require a passenger to pay a deposit of up to \$30 for trips (15%).

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

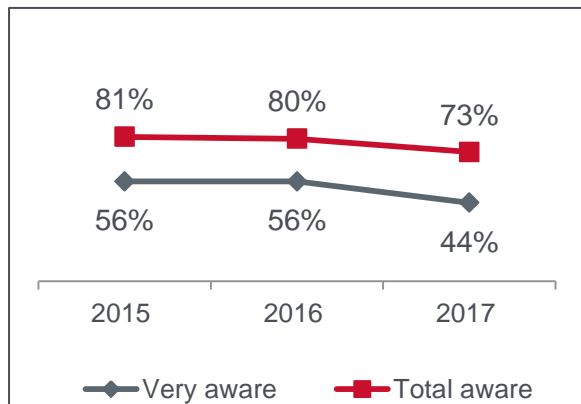
Base: All Calgarians (n=583)/ Don't know responses are not shown

*New question added in 2017

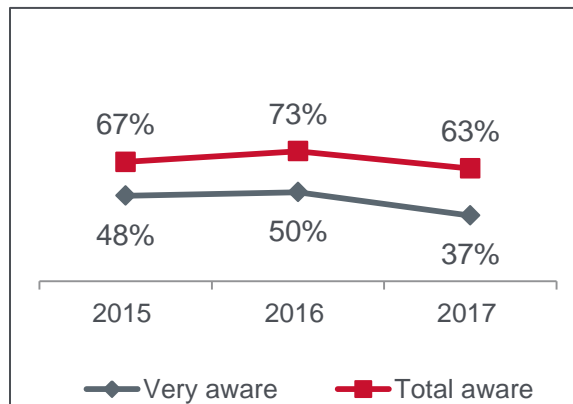
Q40 - To what extent are you aware of each of the following rights that passengers have while using taxi services in Calgary?

Awareness of Rights(Trends Over Time)

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

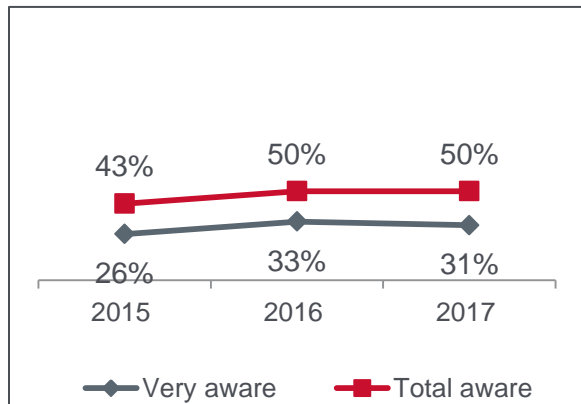


Passengers have the right to travel with a service animal and/or portable mobility aid

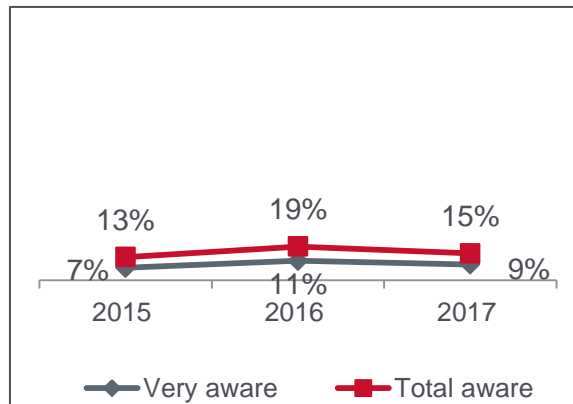


➤ Awareness that passengers have the right to direct the most economical route, and to travel with a service animal/mobility aid has decreased in 2017, including a decrease in strong awareness.

A passenger must pay a \$100 cleaning fee for any mess made in taxis, such as vomiting



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



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

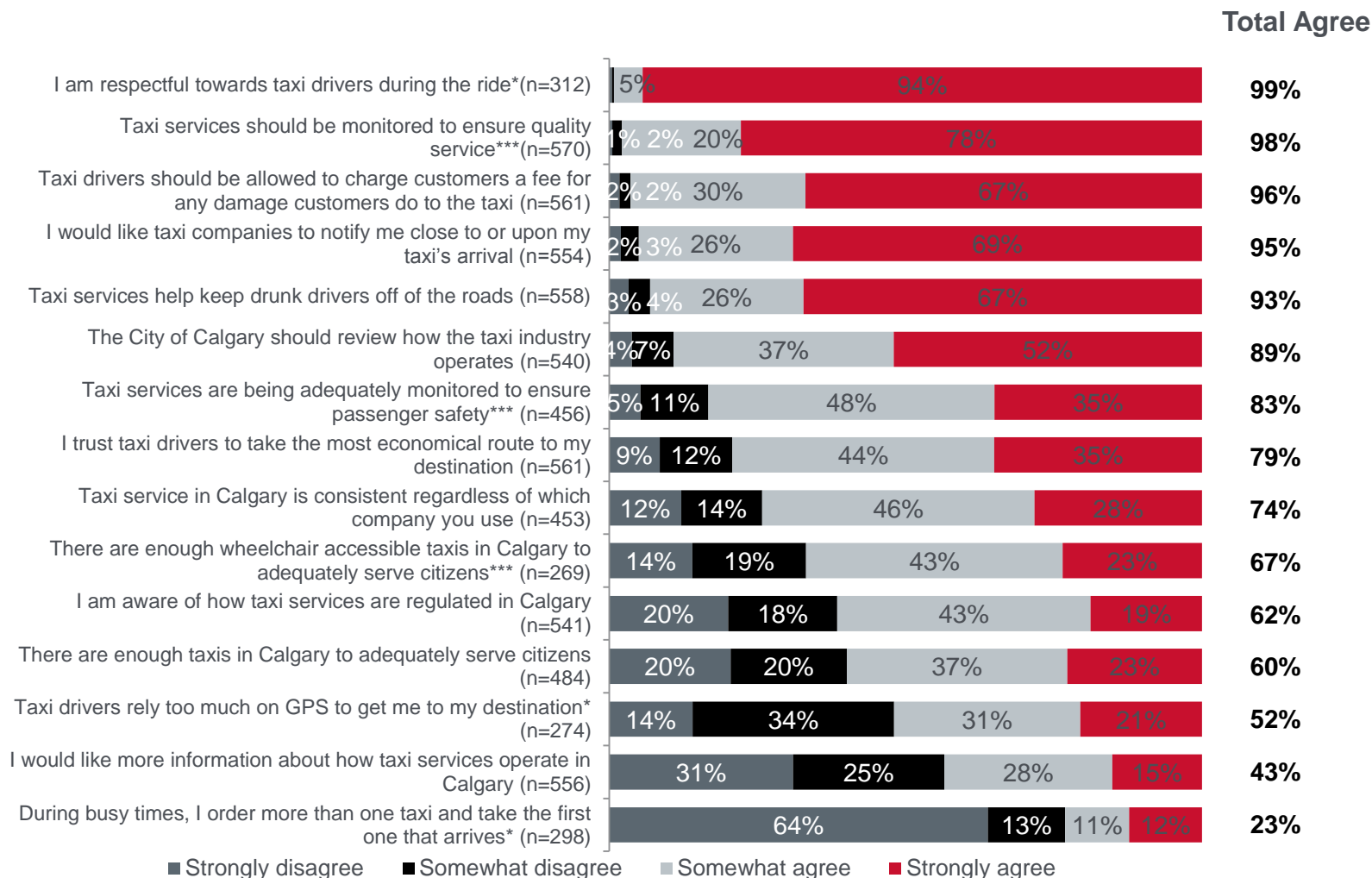
Base: All Calgarians (2017, n=583; 2016, n=600 ; 2015, n=600)

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

Attitudes



Attitudes Towards Taxi Services in Calgary (2017)



In 2017, 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*/Base: Calgarians who have taken a taxi or accessible taxi in the past year (excluding NA/Don't know)

***new in 2017

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
I am respectful towards taxi drivers during the ride*	100%	100%	99%	99%
Taxi services should be monitored to ensure quality service***	-	-	-	98%
Taxi drivers should be allowed to charge customers a fee for any damage customers do to the taxi	87%	93%	94%	96%
I would like taxi companies to notify me close to or upon my taxi's arrival	90%	94%	94%	95%
Taxi services help keep drunk drivers off of the roads	91%	94%	92%	93%
The City of Calgary should review how the taxi industry operates	89%	90%	89%	89%
Taxi services are being adequately monitored to ensure passenger safety***	-	-	-	83%
I trust taxi drivers to take the most economical route to my destination	74%	80%	76%	79%
Taxi service in Calgary is consistent regardless of which company you use	67%	71%	68%	74%
There are enough wheelchair accessible taxis in Calgary to adequately serve citizens***	-	-	-	67%
I am aware of how taxi services are regulated in Calgary	53%	56%	60%	62%
There are enough taxis in Calgary to adequately serve citizens	42%	45%	52%	60%
Taxi drivers rely too much on GPS to get me to my destination*	52%	48%	48%	52%
I would like more information about how taxi services operate in Calgary	39%	44%	50%	43%
During busy times, I order more than one taxi and take the first one that arrives*	23%	19%	21%	23%

In 2017, 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*/Base: Calgarians who have taken a taxi or accessible taxi in the past year (excluding NA/Don't know)

***new in 2017

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)

Strongly Agree	2014	2015	2016	2017
I am respectful towards taxi drivers during the ride*	91%	92%	93%	94%
Taxi services should be monitored to ensure quality service***	-	-	-	78%
Taxi drivers should be allowed to charge customers a fee for any damage customers do to the taxi	59%	66%	65%	67%
I would like taxi companies to notify me close to or upon my taxi's arrival	61%	67%	68%	69%
Taxi services help keep drunk drivers off of the roads	64%	70%	68%	67%
The City of Calgary should review how the taxi industry operates	54%	55%	61%	52%
Taxi services are being adequately monitored to ensure passenger safety***	-	-	-	35%
I trust taxi drivers to take the most economical route to my destination	36%	39%	38%	35%
Taxi service in Calgary is consistent regardless of which company you use	28%	27%	29%	28%
There are enough wheelchair accessible taxis in Calgary to adequately serve citizens***	-	-	-	23%
I am aware of how taxi services are regulated in Calgary	19%	17%	21%	19%
There are enough taxis in Calgary to adequately serve citizens	17%	15%	22%	23%
Taxi drivers rely too much on GPS to get me to my destination*	19%	16%	21%	21%
I would like more information about how taxi services operate in Calgary	14%	15%	23%	15%
During busy times, I order more than one taxi and take the first one that arrives*	12%	10%	10%	12%

In 2017, 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*/Base: Calgarians who have taken a taxi or accessible taxi in the past year (excluding NA/Don't know)

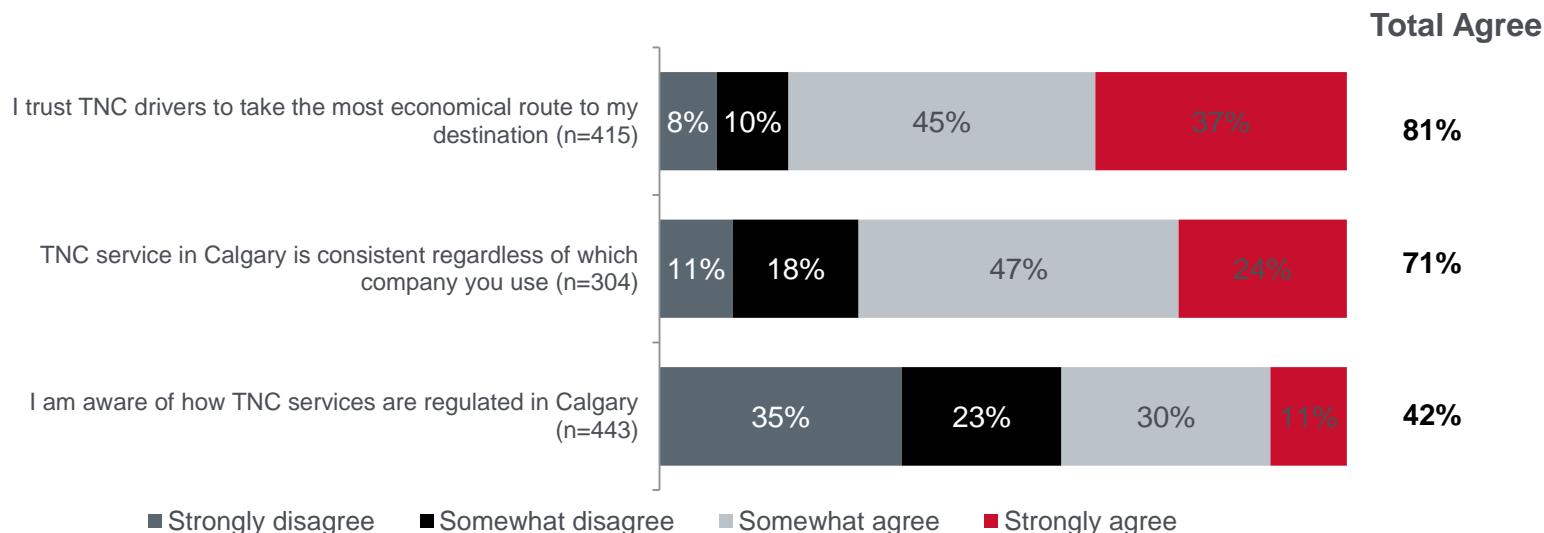
***new in 2017

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

- Almost all Calgarians who used a taxi or accessible taxi in the past year agree that they are respectful towards taxi drivers during rides (99%).
- Calgarians also agree that taxi services should be monitored to ensure quality (98%).
- Half or more (a range of 52% - 96%) agree with various statements regarding taxi services in Calgary.
- Two-in-five (43%) Calgarians would like more information about how taxi services operate in Calgary and about one-quarter (23%) of taxi users confess that they order more than one taxi during busy times.
- Attitudes towards taxi services in Calgary remain consistent with 2016 with an increase in agreement that there are enough taxis in Calgary to adequately serve citizens.
- There are some decreases in strong agreement ratings for the following:
 - I would like more information about how taxi services operate in Calgary
 - The City of Calgary should review how the taxi industry operates

Attitudes Towards TNC Services in Calgary (2017)



- Four-in-five (81%) Calgarians agree that they trust the TNC drivers to take the most economical route to their destination, including more than one-third (37%) who strongly agree.
- Seven-in-ten (71%) Calgarians also agree that TNC service is consistent regardless of the company used.
- Two-in-five (42%) Calgarians agree that they are aware of how TNC services are regulated in Calgary.

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

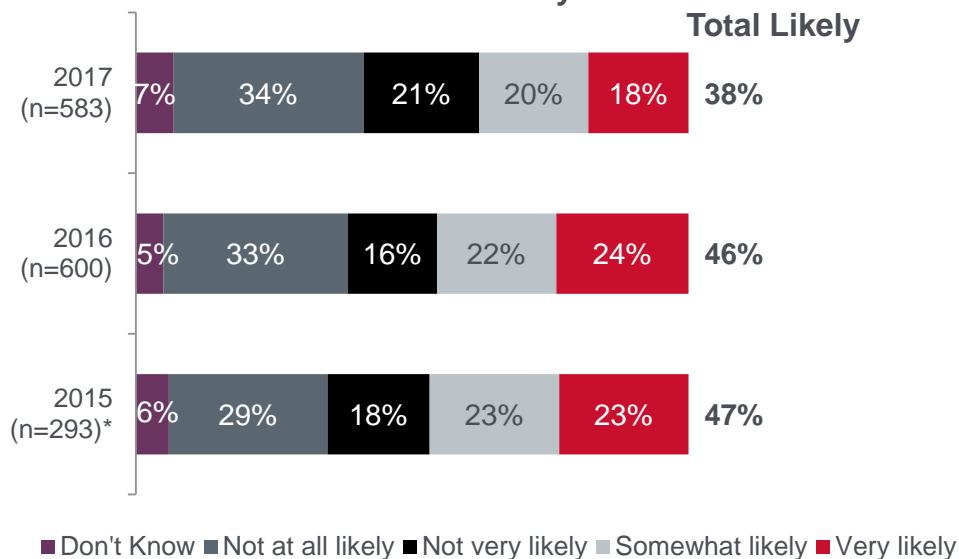
Base: All Calgarians excluding don't know and N/A respondents

New question in 2017

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.

Likelihood to Bypass an Accessible Taxi

Likelihood to bypass an accessible taxi which accommodates mobility devices



Reasons for likelihood to bypass**

	2017 (n=211)
Leave it for someone who needs it	23%
Thought they were for mobility needs people only	18%
I don't need it	17%
It's the right thing to do	15%
More expensive	6%
Didn't know I could take an accessible taxi	3%
Comfort	3%
Too large/ don't need all that room	3%
Convenience	2%
Prefer sedan	<1%
Other	8%
Don't know / refused	10%

- In 2017, 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, a decrease in 2017.
- Among those who are likely to bypass, one-quarter (23%) say they do so to leave it for someone who needs it.

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

Base: All Calgarians

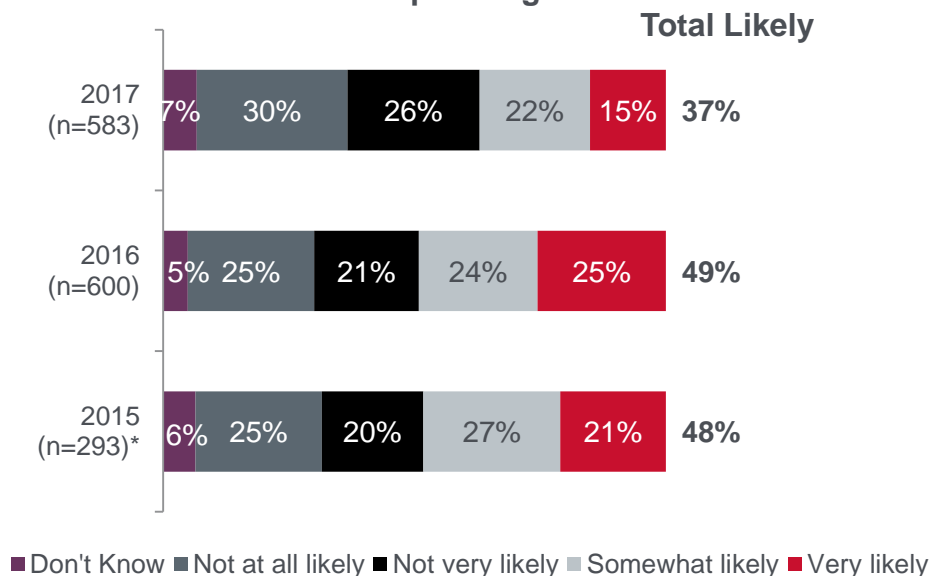
Q42. How likely would you be to bypass an available taxi and look for a different one if it was .. Q42c. Why are you likely to bypass an accessible taxi?

*De-activated mid field in 2015

**New in 2017/ 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**

	2017 (n=208)
If there were people around that needed it, I will bypass it	31%
I don't need it	15%
Didn't know I could take a taxi van if travelling alone	15%
More expensive	11%
It's the right thing to do	6%
Too large/ Don't need all that room	5%
Depends on how many people are in it	4%
Comfort	3%
I would not bypass a taxi van	2%
Convenience	2%
Prefer sedan	1%
Other	4%
Don't know / Refused	10%

- In 2017, more than one-third (37%) of Calgarians are likely to bypass an available taxi and look for a different one if it was a taxi van, a decrease in 2017.
- Among those who are likely to bypass, one-third (31%) will bypass it if there was someone around them who needed it.

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

Base: All Calgarians

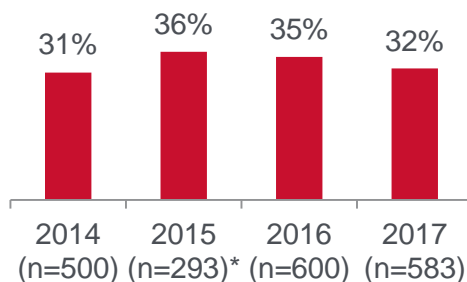
Q42. How likely would you be to bypass an available taxi and look for a different one if it was .. Q42d. Why are you likely to bypass a taxi van?

*De-activated mid field in 2015

**New in 2017/ Base: Those likely to bypass a taxi van/Multiple responses allowed

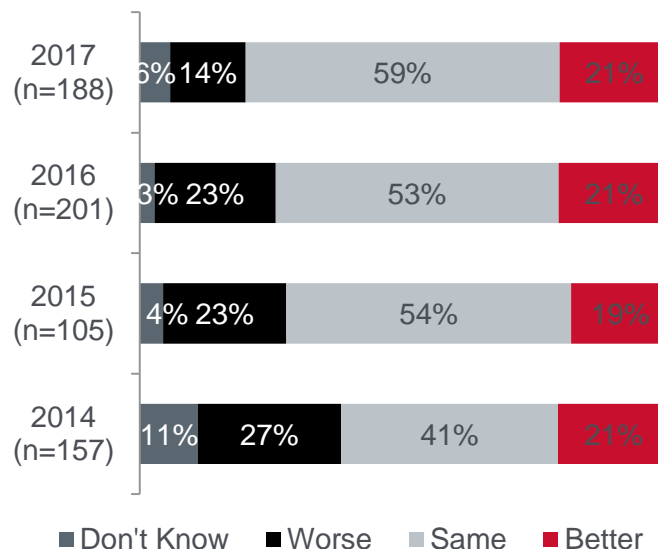
Taxis Outside Calgary

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



Base: All Calgaryans

Service was...



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

- Within the past year, one-third (32%) Calgaryans have taken a taxi in another Canadian urban centre.
- Among these Calgaryans, 59% feel that the service they received was the same as they have received in Calgary, while two-in-five (21%) feel it was better, and 14% feel it was worse (a decrease in 2017).
- As a net result (%better – %worse), an overall 7% of those who have taken taxis in other Canadian urban centres feel that taxi services in Calgary are better, as compared to 2% in 2016 who felt it was worse.

In 2017, 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?

*De-activated mid field in 2015

Additional Comments

Additional Comments

Comments	2017
MORE CABS	7%
Add more cabs	6%
Not enough cabs downtown	1%
More cabs at rush hour / Peak hours	1%
Not enough cabs on weekends / Holidays	1%
RATES	6%
Lower the rate	6%
DRIVER	4%
Other comments regarding drivers	1%
Driver safety	1%
Drivers should be knowledgeable about the city	1%
Drivers need to be able to speak and understand English	1%
Drivers should not use their cell phones	1%
Road safety	3%
Taxis should be monitored/ have built in camera	2%
Allow Uber	2%
Reduce wait times / Faster service	2%
Better driver customer service	2%
Taxis should be clean	2%
Regulate better	2%
More competition / Too many large corporations	1%
Pickup/ Pre-booking need to show up/ show up on time	1%
More TNC services	1%
Need more taxis available during big events / Concerts	1%
Help keep drunk drivers off the road	1%
Not enough taxis for the disabled/ handicapped	1%
Communicate with the public regarding rates, ride share service, etc.	1%
Uber should follow the same regulations as taxi	1%
Taxi services are good / No complaints	1%
Too many cabs at airport	1%
Other	8%
No additional comments	65%

- The majority (65%) of Calgarians did not offer any other comments regarding taxi services.
- Among those who did offer additional comments, common themes relate to requests for more cabs and lowering the rates.

Base: All Calgarians (n=583)/ Mentions less than 1% not shown/Multiple responses allowed /In 2017, 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?
Slight change in question wording in 2017

Additional Comments – Sample Verbatim Responses

“The only thing I can think of is make it more affordable and accessible for people with low incomes.”

“Need more taxis in the city specially when there are events.”

“There should be more taxis available during bar closing hours. There's always an excess at the airport but not enough downtown or near the bars when they are closing. The availability in the outlined areas is not great. Also dispatch not answering calls for a taxi no matter what the time is. The airport fees are too much. Why should I pay more to get to my own house when I live in the city and pay taxes.”

“Just the fact that they have alternative options for citizens of Calgary. The TNC services are a lot cheaper than regular taxi services.”

“The TNC services need to be properly regulated.”

“Taxi cabs refuse to drive passengers who are drunk because of the risk of vomiting. Some passengers are ejected from the car for being sick. They should provide measures that can take care of people who are sick.”

In 2017, 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?

Slight change in question wording in 2017

Demographics



	Calgarians (n=583)
Gender	
Male	49%
Female	51%
Age	
18 - 24 years	12%
25 - 34	21%
35 - 44	20%
45 - 54	20%
55 - 64	14%
65 years of age or older	13%
Prefer not to answer	<1%
Quadrant of Residence	
Downtown Core, including the Beltline area	5%
Northwest	29%
Northeast	22%
Southeast	23%
Southwest	21%
Prefer not to answer	<1%

	Calgarians (n=583)
Vehicle Access	
Yes	89%
No	10%
Prefer not to answer	1%
Member of Car-sharing Program	
Yes	8%
No	92%
Income	
Less than \$40,000	11%
\$40,000 to less than \$60,000	11%
\$60,000 to less than \$80,000	11%
\$80,000 to less than \$100,000	12%
\$100,000 to less than \$120,000	6%
More than \$120,000	24%
Prefer not to answer	25%