

## 2016 Leger – Satisfaction with Taxi Services Survey Summary

### Summary of Survey Results

#### Taxi Usage

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

#### Obtaining Taxi Services

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

#### Overall Satisfaction

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

#### Dispatchers

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

#### Payment and Value

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

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### Summary of Survey Results Continued

#### **Bumper Sticker Awareness**

- Following the mandatory implementation of displaying bumper stickers regarding compliments and complaints about taxi services, 36% of the general public recall having seen the bumper stickers (significant increase from 27% in 2015), which is similar to the level of recall among taxi users (39%).
- Nearly two-in-five (17%) of those who recall the bumper sticker correctly indicates that it informed people to contact The City of Calgary via 311 – a significant decrease from 34% in 2015. 21% incorrectly report that the bumper sticker informed people to call the taxi company.

#### **Drivers & Experiences During the Ride**

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

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#### **Complaints**

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

#### **Awareness of Rights**

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

#### **Attitudes Towards Taxi Services**

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

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### Strategic Observations

Volume is down but frequency is up	Fewer Calgarians report taking taxis in the past year, however, those who are taking taxis appear to be using them more often. As well, we note a significant increase in Code 8 calls – all of which could suggest that the taxi user base that is left is a more “committed” user and the more casual users are abandoning taxis for other modes or due to lack of need (e.g. unemployment).
The frequency of taxi usage is not likely to increase next year	Though taxi usage has declined in the last year and the frequency among taxi users has increased there are predictions that the number of users will continue to decline next year as the economic downturn and new options take their toll on the taxi industry. Hence, satisfaction with key drivers are essential to retain the existing market.
Satisfaction is strong, but value for money is down	While most riders are happy with the quality of the service they are getting, there is a declining sense of value for money from the user base. The economic downturn is pressing on everyone’s expenditures and the impact (if any) of lower fares is not yet being felt by the riding public.
The little irritants persist	Taxi users continue to report broken debit machines, insufficient change and, most commonly, drivers using cell phones. In a marketplace where competitive options are increasing, these irritants may begin to take their toll on satisfaction and usage.
Dispatch and online booking facilities remain important	Dispatch remains a key driver of satisfaction this year as well; satisfaction with dispatch have been improving directionally. With higher incidence of online bookings among potential taxi users next year and declining satisfaction level with using Apps among current users, the improvement of these booking facilities remain important.

### Context and Objectives:

#### **Context:**

- Livery Transport Services (LTS) engaged Leger to conduct the annual satisfaction with taxi services survey.
- The initial benchmark survey was conducted in 2014 following which informed the design of the survey.
- LTS aims to track citizen usage and satisfaction with taxi services in Calgary and embarked on the first tracking wave in June 2015 and another in 2016.
- Since 2014, the industry has evolved, including the growth of car sharing services, introduction (and removal) of ride sharing companies, economic pressures and changes in taxi regulations could have significant influence on citizen perceptions.

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

#### **Objectives:**

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

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### Methodology:

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