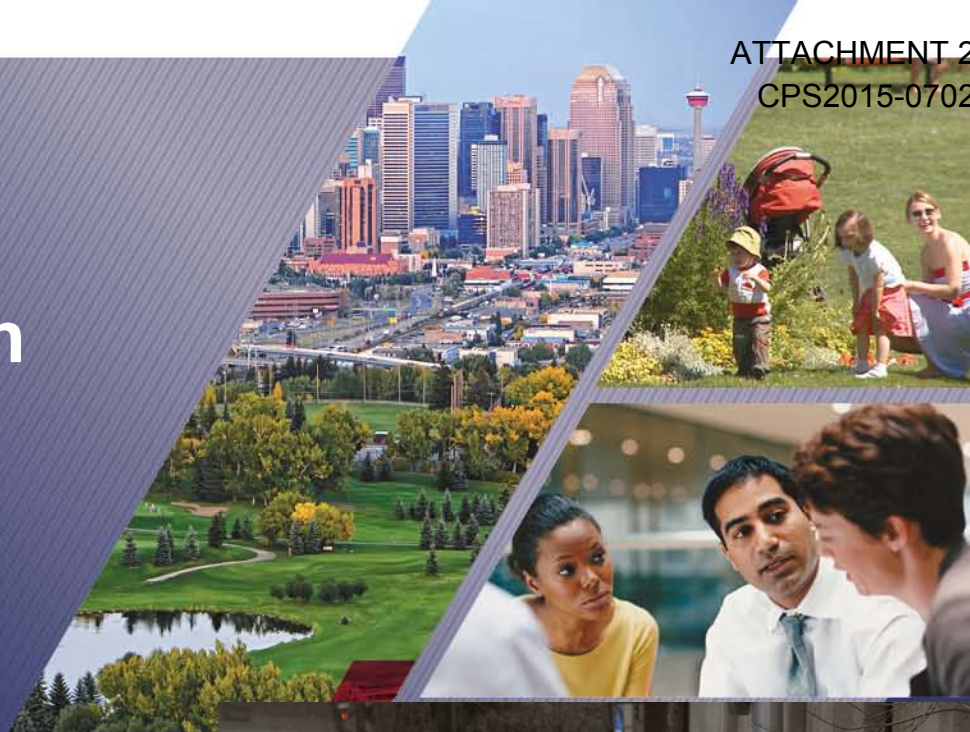


July 2015

2015 Satisfaction with Taxi Services

Executive Summary Report of
Telephone Survey



Prepared for The City of
Calgary by:



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CPS2015-0702 Limousine Regulations Amendments Att-2
ISC: UNRESTRICTED

Onward/Taxi and Limousine Advisory Committee



THE CITY OF
CALGARY

Context and Objectives

Context:

- The Taxi and Limousine Advisory Committee (TLAC) has been mandated to conduct citizen satisfaction research regarding taxi and limousine services in Calgary.
- The initial benchmark survey was conducted in 2014 following exploratory qualitative research which informed the design of the survey.
- Since the initial benchmark survey, 133 taxi license plates were released, and mandatory bumper stickers have been placed on vehicles to inform customers to contact 311 with compliments and complaints.
- TLAC aims to track citizen usage and satisfaction with taxi services in Calgary and embarked on the first tracking wave in June 2015.

This report represents the findings from the 2015 telephone survey with 600 Calgarians and includes comparisons to the data collected in 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
 - Allow for open comments.

Methodology

Sample Size	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	18 minutes: June 8 to June 21, 2015 13 minutes: April 24 to May 11, 2014
Margin of Error	+/- 4.0%, 19 times out of 20 (+/- 4.9% among taxi users)
Data Analysis	Data were weighted to be representative of Calgarians 18+ by age and gender

Summary of Survey Results

Taxi Usage

- Within the past year, Calgarians have used the following services:
 - Taxis – 67%, increased from 60% in 2014
 - Accessible taxis – 6% (4% in 2014)
 - Total taxis & accessible taxis = 68%
 - Sedans – 11% (9% in 2014)
 - Limousines – 8% (4% in 2014)
 - Car-sharing programs – 9% (5% in 2014).
- The frequency of overall taxi usage (including accessible taxis), however, has declined from an average of 16 trips in 2014 to an average of 14 trips in 2015.
- The main reasons that some Calgarians have not used taxi services lie with having their own vehicles (65%, similar to 64% last year), and not having a need for taxi services (22%, decreased from 30% in 2015). Reasons related to car pooling with others (12% vs. 9% last year) or opting to use public transportation (12% vs. 8% in 2014) show slight upward trends.
- Among taxi users, 65% have used taxi services during weekdays (slightly declined from 70% last year), and 64% have used taxi services during weekends (compared to 59% in 2014).
- Weekday taxi usage is fairly constant at all times of day, albeit slightly higher during the early morning rush hour, fairly consistent with 2014 results.
- Weekend usage peaks during the late evening, also consistent with last year's findings.
- Just more than one-half (56%) of Calgarians are likely to use taxi services within the next 12 months, showing a potential downward trend from the 67% 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 (61%); and, to get to and from the airport (53%).

Summary of Survey Results

Obtaining Taxi Services

- Taxi users most commonly phone dispatchers to obtain taxi services either by pre-booking (60%) or calling for immediate service (63%, increased from 57% in 2014). More than one-third (36%) have hailed a taxi, 16% have used a hotel taxi stand, and 15% have used a designated taxi stand. Some use the “Code 8” approach of calling drivers directly (12%), and 16% have booked taxis online, showing a slight upward trend from 12% in 2014. A total of 40% of those likely to take a taxi next year would be likely to use an online booking system or App in order to arrange the service.
- Nearly all taxi users are satisfied with using a hotel (94%) or designated taxi stand (91%). Satisfaction with using online systems has increased from 82% in 2014 to 92% this year. Further, 91% are satisfied with calling drivers directly, 90% are satisfied with pre-booking taxis with dispatch, and 81% are satisfied with calling dispatch for immediate service, increased from 70% in 2014. Satisfaction is slightly lower at 73% for hailing a taxi.

Dispatchers

- Among taxi users arranging rides through dispatchers, 88% are satisfied with the courteousness of dispatchers and 80% are satisfied with dispatchers explaining the expected wait time for the taxi to arrive; both results are similar to findings in 2014.
- This year, 77% of this subgroup of respondents is satisfied with their ability to speak with a dispatcher in a timely manner, which has increased from 68% in 2014.
- Overall, 94% of Calgarians would like dispatchers to notify them upon the arrival of the taxi, slightly increased from 90% in 2014.

Summary of Survey Results

Drivers

- Taxi drivers in Calgary continue to be held in high regard by taxi users. Fully 94% are satisfied with taxi drivers.
- More than 9-in-10 taxi users are satisfied with the professional appearance of drivers (94%), with the courteousness of drivers (94%), with the ease of communication with drivers (92%, slightly increased from 87% in 2014), and with the safe manner in which they drive (91%).
- Further, a sizeable majority is also satisfied with drivers taking the most economical routes (89%), with drivers' knowledge of the city (89%), and with the helpfulness of the driver providing assistance (82%).
- Increases in intensity levels of satisfaction emerge this year for the professional appearance of drivers, and for the helpfulness of drivers providing assistance.

Experiences During the Ride

- Overall, taxi users continue to express strong satisfaction ratings for their various experiences during their trips this past year.
- A large majority are satisfied with the cleanliness of the vehicles (93%) and with the condition/maintenance of the vehicles (93%).
- Further, 88% are satisfied with the amount of time it took for their taxi to arrive, increased from 82% in 2014.
- A total of 85% are satisfied with radio stations played during the ride, and 79% are satisfied with the amenities in the vehicles, showing a slight increase since last year (74%).
- The majority (61%) of taxi users continue to experience drivers using cell phones.
- Overall, 96% of taxi users are satisfied with the taxi drivers' conduct related to their ride, somewhat increased from 91% in 2014, and showing notable increases in the intensity of satisfaction this year.

Summary of Survey Results

Overall Satisfaction

- Overall satisfaction with taxi services sits at 87% (86% in 2014), and an increase has been achieved among those who are “very” satisfied (48% in 2015 vs. 40% in 2014).
- Almost all (94% vs. 100% in 2014) limousine customers are satisfied with the services they received this past year.
- A strong majority (92% vs. 93% in 2014) of sedan customers are also satisfied with their experiences.
- The key factors influencing overall satisfaction include (in ranked order):
 - Taxi drivers (courteousness, driving safely, communication, taking the most economical route, professional appearance)
 - Experiences during the ride, especially with music/radio
 - Dispatchers (ability to speak with them in a timely manner, courteousness)
 - Value for money.

Payment and Value

- Taxi users pay for their taxi services primarily by credit card (45%) or cash (36%). A smaller proportion of taxi users pay their taxi fares via debit (14%) or by using taxi vouchers/chits (4%). These payment trends are similar to 2014 trends.
- Some (21% and 19% in 2014) 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 (10%, similar to 11% last year).
- Overall, 69% of taxi users are satisfied with the value for money they received from their taxi rides this past year, including only 20% who are very satisfied with the value for money paid (similar to result in 2014).
- Some price-sensitivity is at play, as taxi users are highly satisfied (87%) with the overall taxi services they received, but less satisfied with the value for money they received (69%).

Summary of Survey Results

Bumper Sticker Awareness

- Following the mandatory implementation of displaying bumper stickers regarding compliments and complaints about taxi services, 27% of the general public recalls having seen the bumper stickers, which is similar to the level of recall among taxi users (27%).
- One-third (34%) of those who recall the bumper sticker correctly indicates that it informed people to contact The City of Calgary via 311.
- However, 16% incorrectly report that the bumper sticker informed people to call the taxi company.

Complaints

- Only 3% indicate that they have made a complaint about the taxi services they received (similar to 4% in 2014). 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 (11%) or that they didn't know to whom to complain (3%).
- Among the few taxi users who did make a complaint about taxi services in Calgary within the past year, 81% indicate that they made the complaint to the taxi company directly, decreased from 94% in 2014. Further, 16% complained via 311 at The City of Calgary, increased from 8% in 2014.
- Satisfaction with complaint-resolution is now at 37%, increased from (23%) in 2014.
- The reader should note that the results regarding complaints are based on very small sample sizes.

Summary of Survey Results

Awareness of Rights

- General awareness of passenger rights is strong for many areas (ranging from 96% to 81%); however is relatively lower for knowing that passengers can travel with service animals or mobility devices (67%) or that passengers can request assistance (60%).
- Further, 85% of taxi users are satisfied with the music and or radio station being played during the ride, but just 54% are aware that they are entitled to a silent trip, if desired.
- Awareness is significantly lower for drivers' rights to request a \$100 cleaning fee for any mess made by passengers during the ride (43%), or that drivers can ask for a deposit (13%).

Attitudes Towards Taxi Services

- Attitudes towards taxi services in Calgary are positive and have even improved in certain areas since 2014.
- All (100%) Calgarians agree that they are respectful towards taxi drivers during rides, and 94% feel that taxi services help keep drunk drivers off of the roads.
- With respect to customer service, most (94%) Calgarians would like taxi companies to notify them close to or upon their taxi's arrival, and 80% trust taxi drivers to take the most economical route, somewhat increased from 74% in 2014. A total of 71% of Calgarians feel that taxi service is consistent regardless of which company is used, one-half (48%) believe that drivers rely too much on GPS, and 45% feel that there are enough taxis in Calgary to adequately serve citizens, similar to 2014 results.

Summary of Survey Results

Attitudes Towards Taxi Services

- Only 43% are aware that passengers must pay a \$100 cleaning fee for any mess made during the ride, and 93% agree that taxi drivers should be able to charge customers a fee for any damage customers do to the vehicle during the ride, which is somewhat stronger than the 87% agreement level gleaned in 2014.
- Fully 90% of Calgarians believe that The City of Calgary should review how the taxi industry operates, similar to results from last year, and 77% agree that taxi services are being adequately monitored, increased from 69% in 2014.
- Just more than half (56%) of Calgarians report being aware of how taxi services are regulated in Calgary, and 44% indicate that they would like more information about how taxi services operate in Calgary, slightly increased from 39% in 2014.
- Finally, 19% admit that they order more than one taxi during busy times and take the first one that arrives.

Final Comments

- The majority (60%) 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, especially during peak hours.
- Others provide comments related to drivers, including a desire for improved customer service.
- In addition, certain respondents feel that taxi fares are too expensive (5%), certain Calgarians express a desire for faster service (3%), and others (3%) want The City to allow Uber into the market (3%) or oppose this (1%).

Strategic Observations

Drivers' Customer Service

In an economic downturn, and a potentially less frequented taxi industry, customer service will matter more, and is critical as a key driver of satisfaction.

Educational activities can make a difference

The bumper sticker educational strategy appears to have instigated change in awareness and behaviours with respect to compliments and complaints. The upcoming Passenger and Driver Bill of Rights roll-out should also assist in raising customer awareness and setting expectations, and brokers should be encouraged to raise awareness of online booking/Apps available.

Dispatch improvements are noted and remain important

Dispatch remains a key driver of satisfaction, but to a lesser extent this year as improvements have been achieved. Nonetheless, additional efforts to ensure customers can easily access dispatch can be pursued.

Price-sensitivity continues to exist

Value for money also acts as a key driver of satisfaction and customers only "somewhat" feel they are receiving good value for money for the fare they pay. Use caution in any considerations to increase taxi fares in the near future.

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

With customers being price-sensitive in today's economic climate, they predict that they will be less likely to use taxi services over the next year. The industry should plan accordingly with the consideration of any new plates and staffing levels.