

SATISFACTION WITH LIVERY SERVICES – REPORT OF TELEPHONE SURVEY 2017

SUMMARY

Findings from the 2017 telephone survey with 583 Calgarians on usage and satisfaction with livery services in Calgary are reported, including comparisons to the data collected in 2014, 2015 and 2016.

Overall, the 2017 telephone survey results confirm that:

- Overall satisfaction with livery services in Calgary remains high (98% for TNC, 97% for limousine, 90% for sedan limousine and 88% for taxi)
- Sense of safety with livery services is high (97% for TNC, 94% for taxi, 94% for sedan limousine, 91% for limousine and 87% for accessible services)
- Year-over-year, usage of taxi services is on the decline (from 62% to 55% of respondents) while usage of TNC services is on the rise (from 6% to 17% of respondents).

BACKGROUND INFORMATION

As directed by Council, LTAC conducted an initial benchmark survey in 2014 to track citizen usage and satisfaction with taxi services in Calgary. This was followed by a first tracking wave in 2015 and a second tracking wave (conducted by Administration) in 2016. Results from these surveys were reported to Council through CPS2014-0664, CPS2015-0702 and CPS2016-0633.

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

INVESTIGATION

Key observations from the 2017 telephone report (Attachment) are as follows:

- Momentum is trending upward for 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

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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.

STAKEHOLDER ENGAGEMENT OR RESEARCH CONDUCTED

The telephone survey of 600 Calgarians was conducted between May 24 and June 5, 2017, by the research company Leger. The overall margin of error is +/- 4.1%, 19 times out of 20; +/- 5.5% among taxi users.

CURRENT AND FUTURE FINANCIAL IMPACTS

None

RECOMMENDATIONS FOR LTAC TO CONSIDER

To receive this report for information.

ATTACHMENT

LTAC – Citizen Satisfaction 2017

SUBMISSIONS PRESENTED BY: Cheryl McLaughlin, Chair, LTAC Communication, Engagement and Research Subcommittee