

LTAC – Post-Stampede Satisfaction 2017

Results of Omnibus Survey

Prepared for The City of Calgary by:

Contact:

Ian Large
Vice President
Leger

(780) 423-0708
ilarge@leger360.com

808 4th Ave SW, Suite
1000
Calgary, AB, T2P 3E8



Context and Objectives





Context & Objectives

Livery Transport Advisory Committee (LTAC) has been mandated to conduct citizen satisfaction research regarding vehicle for hire services in Calgary. As part of the research program, LTAC sought to evaluate taxi users' satisfaction during peak taxi usage periods, such as post-Stampede and the post - Christmas holiday season. In addition, LTAC sought to compare differences in satisfaction levels during the Christmas holiday season and Stampede versus during non-peak periods in the spring.

The first Stampede evaluation was conducted in July 2014 followed by Stampede evaluation in July 2015, July 2016 and July 2017. The first post - Christmas holiday evaluation was conducted in January 2014 followed by another post-holiday evaluation in January 2016 and January 2017. This report presents the findings from the July 2017 post- Stampede, compared to results from previous evaluations.

The results are compared two ways –

- Over the stampede period since July 2014
- Over the past year – comparing peak periods (post-holiday, post-stampede) and non-peak periods (in Spring) in 2017

LTAC decided to expand the post-holiday survey this year by including questions around the usage and satisfaction of Transport Network Companies services.

Methodology





Methodology

How

- Data were collected for 503 Calgarians, including 222 who have used taxi services within the past month or so via Leger's Calgary online omnibus survey. The data were weighted to represent the normal distribution of Calgarians as reported by Statistics Canada.

When

- The survey was conducted between July 17th 2017 and July 20th, 2017 (post-Stampede).
- Results in this report are compared to findings from surveys conducted in the previous years, wherever applicable.

Validity

- As a non-random internet survey, a margin of error is not reported. The results should be regarded as directional and may not necessarily be projected to the larger population without further quantitative research.
- *Note: Since January 2016, the time frame wording was changed from '... within the past two months' to '...within the past month or so' in order to define the post-Stampede season we were interested in evaluating.*

Summary of Results





Post-Stampede Results

Half of Calgaryans used taxi services in the past month or so

Taxi users in Calgary used taxi services for 4 trips, on average (trending up over the Stampede period since 2015)



- GET HOME**
- SOCIAL FUNCTIONS**
- AIRPORT**
- STAMPEDE PARTIES**

Majority (85%) of taxi users satisfied with service, consistent over the Stampede period since 2014

Satisfaction with the taxi services has been forming a downward trend in 2017, specifically for taxis used to go to or from the airport

More than one-quarter of Calgaryans used TNC services in the past month or so

TNC users in Calgary used TNC services for 5 trips, on average



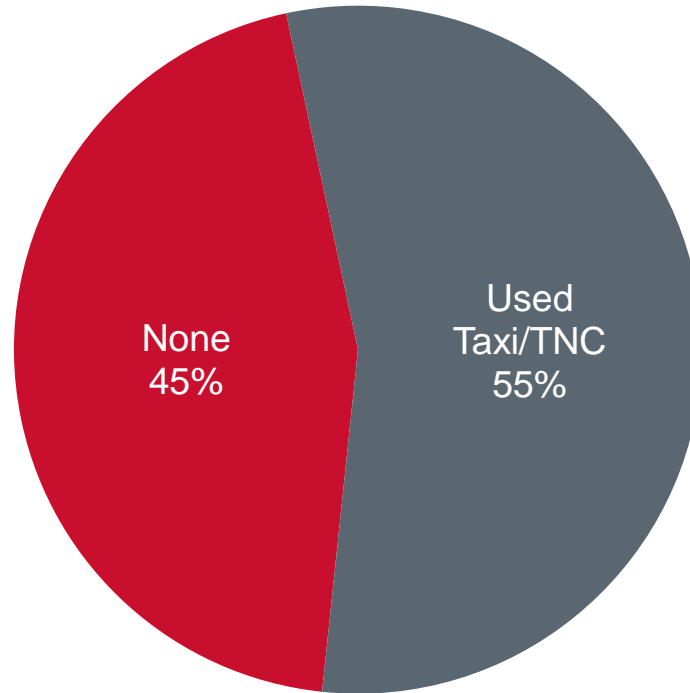
- SOCIAL FUNCTIONS**
- GET HOME**
- STAMPEDE PARTIES**

High majority (95%) of TNC users satisfied with service; very satisfied ratings decreased since Spring 2017

Very satisfied ratings with TNC services has dropped in July 2017 for TNCs used to go to or from the airport

Detailed Results





Taxi	50%
TNC services	27%
Both	22%

Base: Calgarians (n=503)

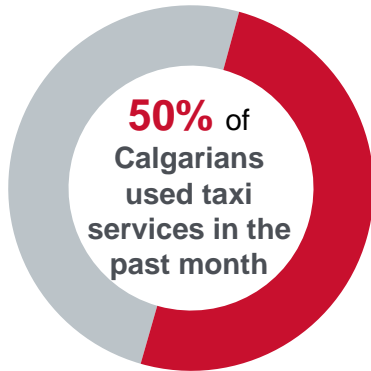
Q1. Within the past month or so, approximately how many times have you used taxi services in Calgary? Q4. Within the past month or so, approximately how many times have you used TNC services in Calgary?

Taxi Services



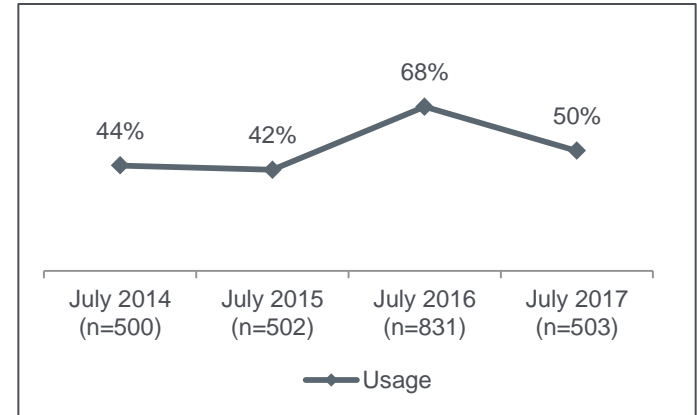
Usage of Taxi Services – Past Month

Taxi Usage - Past Month -

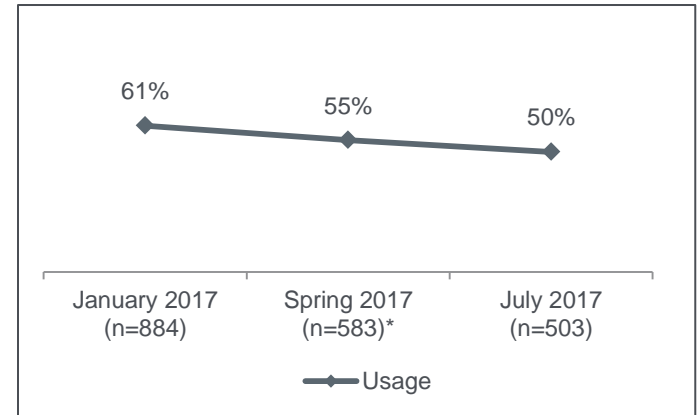


- ✓ Half of Calgary residents used taxi services in the past month or so.
- ✓ Taxi usage decreases with age. Calgary residents who are employed are more likely to have used taxi services in Calgary over the past month or so.
- ✓ Comparing Stampede periods over time, taxi usage has dropped in July 2017 after a rise in July 2016.
- ✓ Taxi usage has been forming a downward trend in 2017.

Trends Over the Stampede Period



Trends Over the Past Year



Base: Calgary residents (n=503)

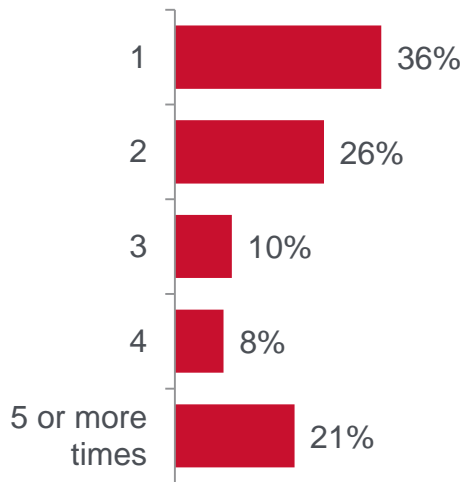
*Indicates usage over the past year

Q1. Within the past month or so, approximately how many times have you used taxi services in Calgary?



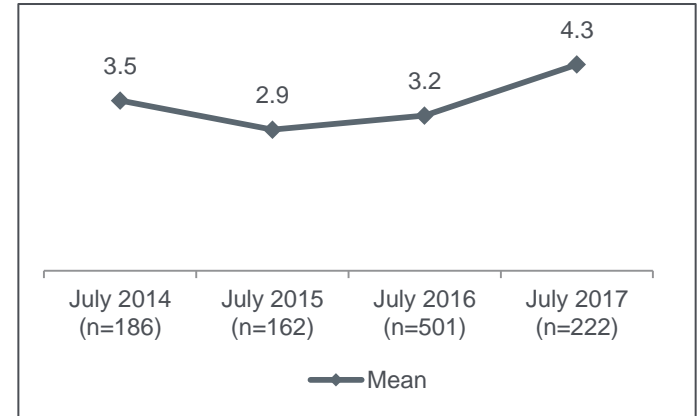
Usage of Taxi Services – Past Month

Trips over the past month

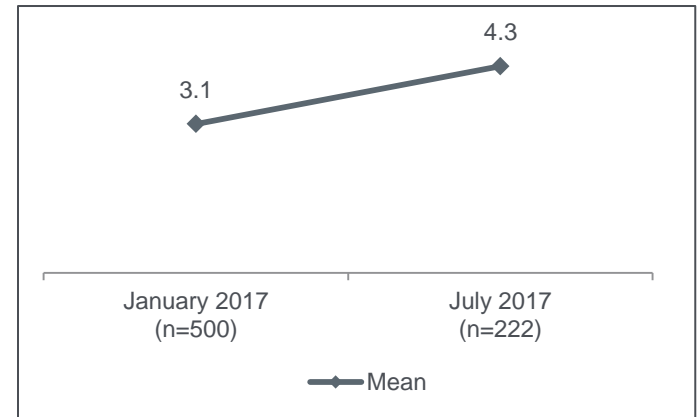


- ✓ Users made use of Calgary’s taxi service 4 times (on average) within the past month or so.
- ✓ The average number of trips is trending up over the Stampede period after a dip in 2015.
- ✓ Average trips have increased slightly compared to January 2017.

Trends Over the Stampede Period



Trends Over the Past Year



Base: Calgaryans who used taxi services in the past month or so (n=222) (Prior to January 2016 ‘within the past 2 months’)
 Q1. Within the past month or so, approximately how many times have you used taxi services in Calgary? (Prior to January 2016 ‘Within the past two months’)



Purpose of Using Taxi – Past Month Trends Over the Stampede Period

Purpose of using taxi	July 2014 (n=187)	July 2015 (n=162)	July 2016 (n=501)	July 2017 (n=222)
To get home*	5%	-	1%	44%
Pleasure – social functions (excluding holiday parties)	39%	42%	41%	32%
Airport	33%	31%	29%	28%
To attend Stampede parties or events	26%	22%	24%	23%
Business	13%	12%	12%	12%
Running errands	13%	10%	11%	12%
Get to work	11%	6%	13%	11%
Medical appointments	11%	8%	9%	9%

Taxi users primarily used a taxi:

- ✓ to get home (increase since July 2016)
- ✓ for pleasure (trending downward over the Stampede period since July 2015)
- ✓ to go to or from the airport (trending downwards over the Stampede period since July 2014)
- ✓ to attend Stampede parties (consistent with July 2016)

Base: Calgarians who used taxi services within the past month or so (Prior to January 2016 'within the past 2 months')

Mentions 2% or less for 2017 not shown / Multiple mentions allowed

* New pre-code added in 2017

Q2. Thinking of the taxi services you used within the past month or so, for what purpose(s) did you use a taxi? (Prior to January 2016 'Within the past two months')



Purpose of Using Taxi – Past Month Trends Over the Past Year

Purpose of using taxi	January 2017 (n=500)	Spring 2017 (n=314)	July 2017 (n=222)
To get home*	47%	7%	44%
Pleasure – social functions (excluding holiday parties)	28%	58%	32%
Airport	31%	54%	28%
To attend Stampede/holiday parties or events	30%	-	23%
Business	8%	26%	12%
Running errands	10%	8%	12%
Get to work	10%	20%	11%
Medical appointments	9%	14%	9%

Taxi users primarily used a taxi:

- ✓ to get home (increase since Spring 2017)
- ✓ for pleasure (decrease since Spring 2017)
- ✓ to go to or from the airport (decrease since Spring 2017)
- ✓ to attend Stampede parties

Purpose of using taxi is similar in the peak periods of Stampede and Christmas holiday seasons.

Base: Calgarians who used taxi services within the past month or so (Prior to January 2016 'within the past 2 months')

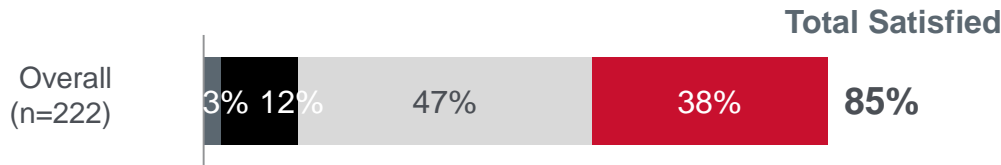
Mentions 2% or less for 2017 not shown / Multiple mentions allowed

* Was not presented as a pre-code in Spring 2017

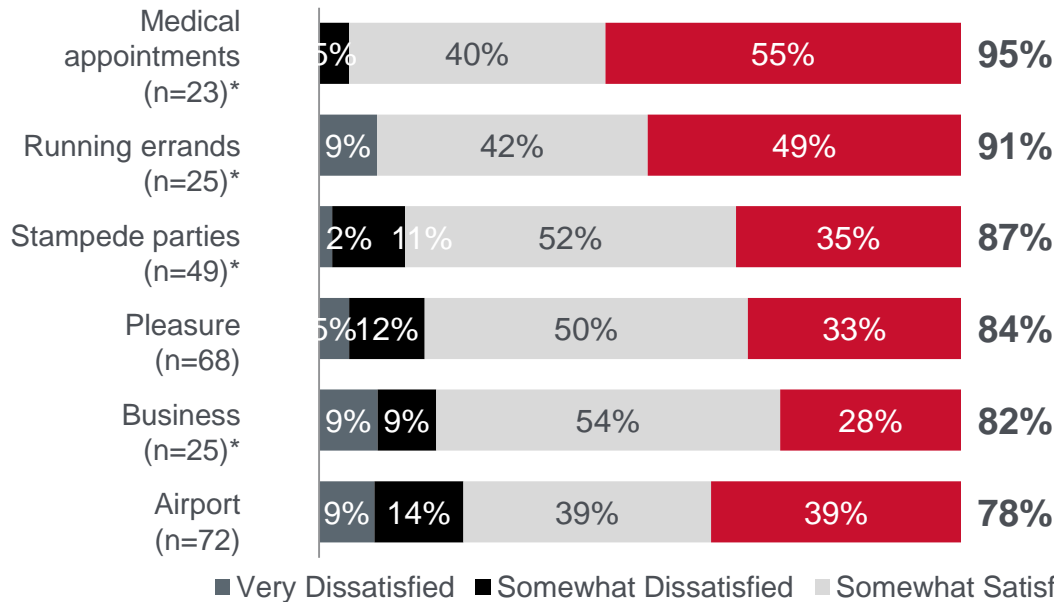
Q2. Thinking of the taxi services you used within the past month or so, for what purpose(s) did you use a taxi? (Prior to January 2016 'Within the past two months')



Satisfaction with Taxi Services – Past Month



By Trip Purpose

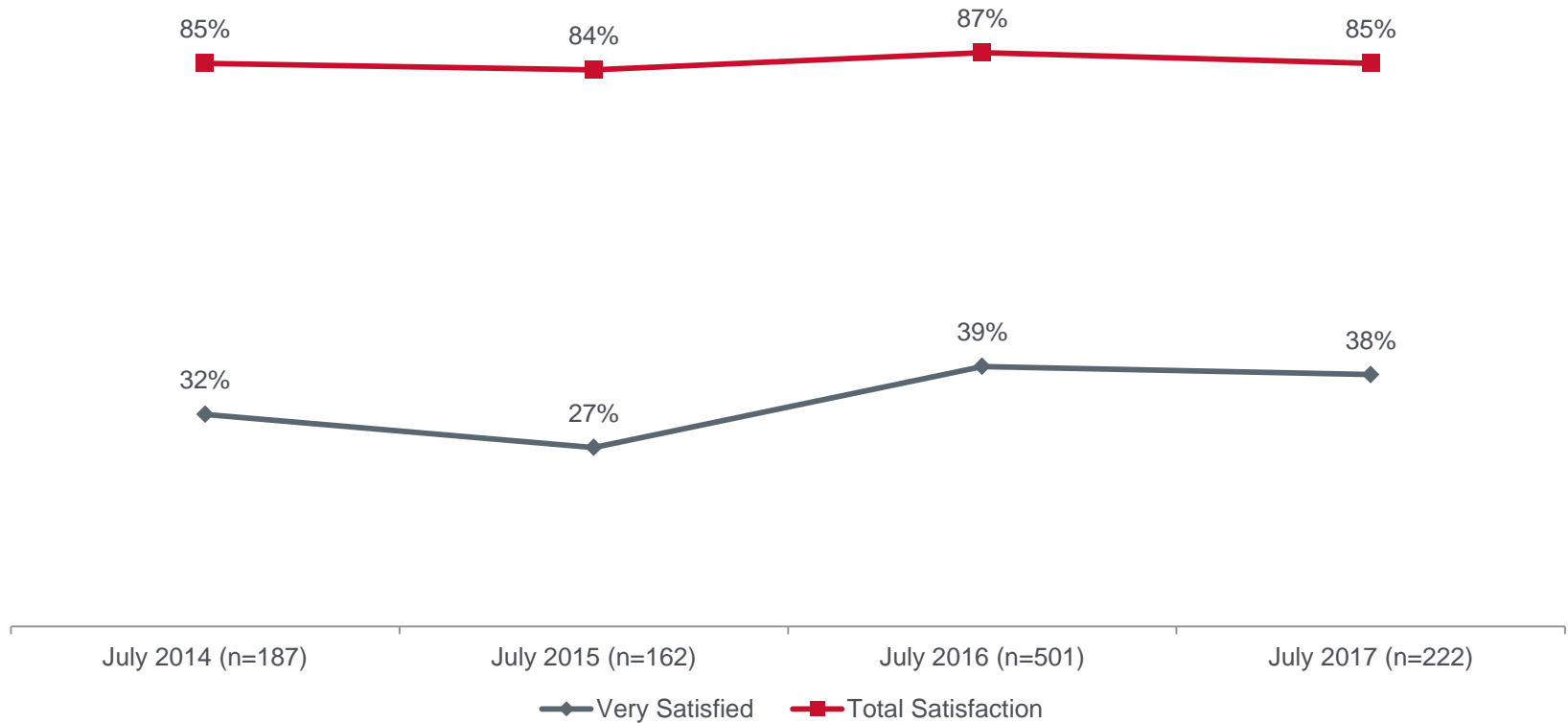


- ✓ The majority of taxi users in Calgary are satisfied with the taxi services over the past month or so, including about two-in-five who are very satisfied. Females, those with high school or some post-secondary (not University) education, and/or an annual household income of less than \$60,000 are more likely to be satisfied with taxi services over the past month or so.
- ✓ Four-in-five or more taxi users are satisfied with the taxis they used for medical appointments, running errands, stampede parties, pleasure and business. Users are less satisfied with the taxi services they used to go to or from the airport.

Base: Calgaryans who used taxi services within the past month or so / *Caution to be taken in interpretation of data due to small sample size Q3. Overall, how satisfied are you with the taxi services you received over the past month or so?



Overall Satisfaction with Taxi Services Trends Over the Stampede Period

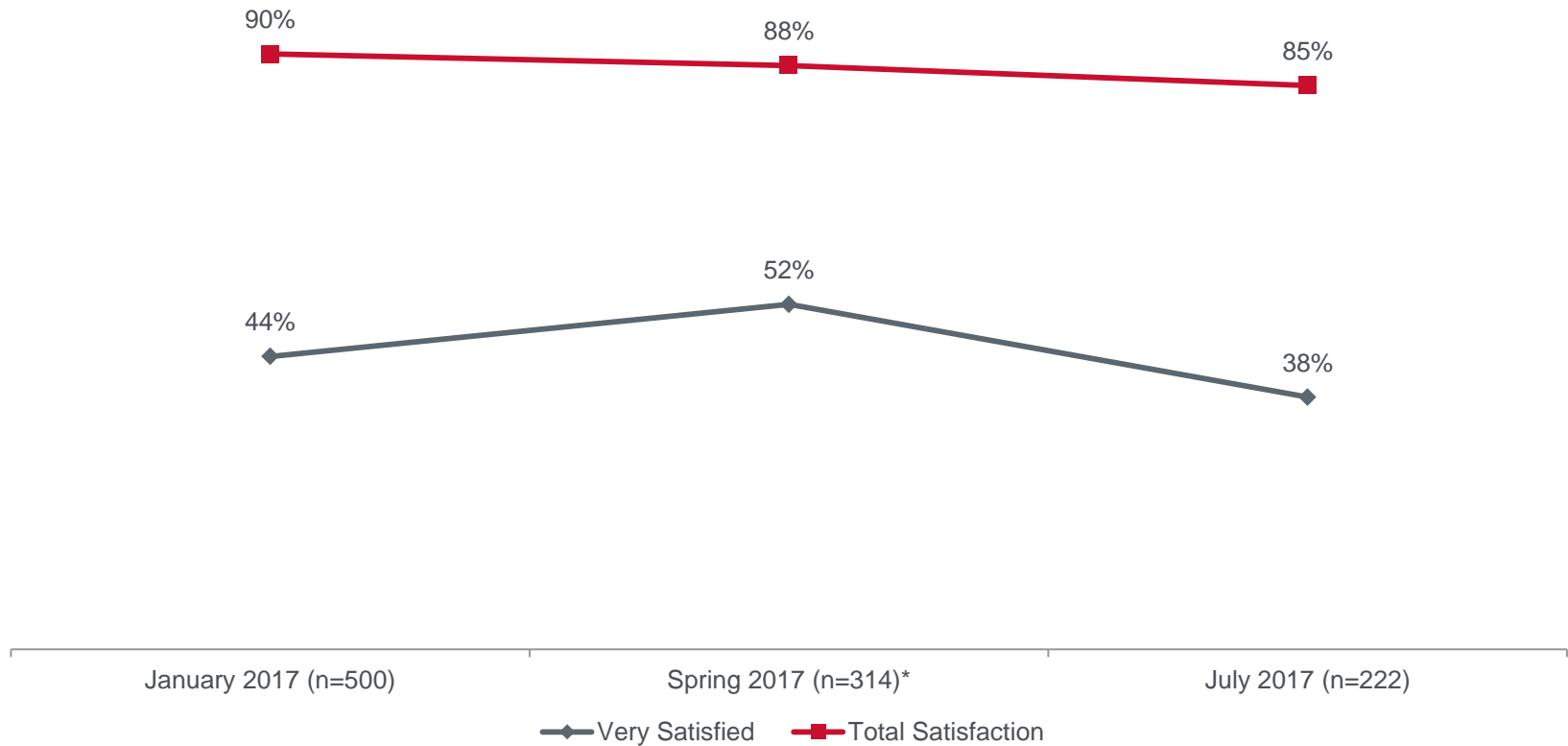


- ✓ Overall satisfaction with taxi services is consistent over the Stampede period.
- ✓ Very satisfied ratings have remained consistent in July 2017 after an increase in July 2016.

Base: Calgarians who used taxi services within the past month or so (Prior to January 2016 'within the past 2 months')
 Q3. Overall, how satisfied are you with the taxi services you received over the past month or so? (Prior to January 2016 'Within the past two months')



Overall Satisfaction with Taxi Services Trends Over the Past Year



- ✓ Overall satisfaction with taxi services has been forming a downward trend since January 2017.
- ✓ Very satisfied ratings have decreased since Spring 2017.

Base: Calgarians who used taxi services within the past month or so

* Base: Calgarians who have used taxis within the past year

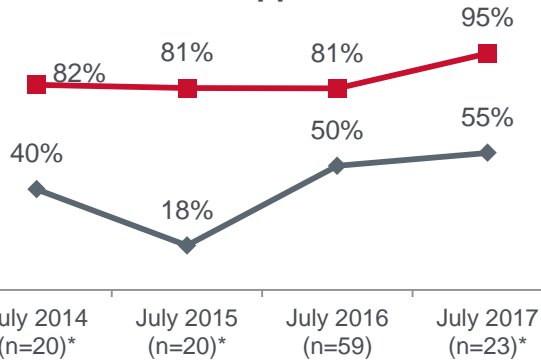
Q3. Overall, how satisfied are you with the taxi services you received over the past month or so?

(Spring 2017) Q23. Overall, how satisfied or dissatisfied are you with the taxi services you received in Calgary over the past year?

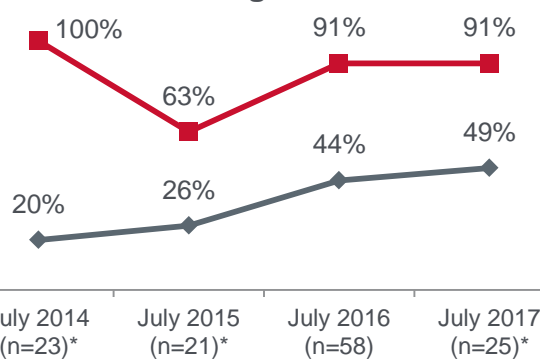


Satisfaction by Trip Purpose Trends Over the Stampede Period

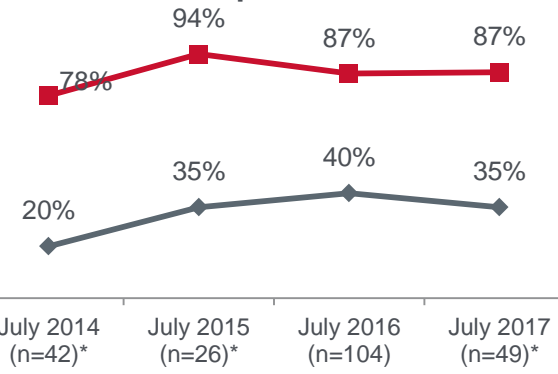
Medical Appointments



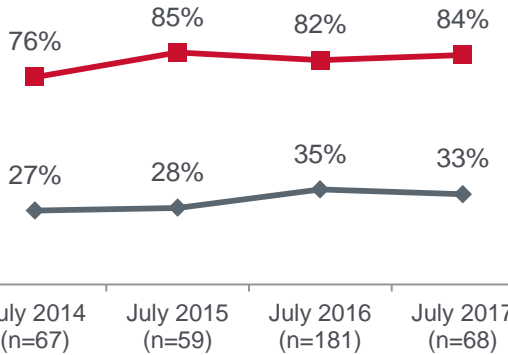
Running errands



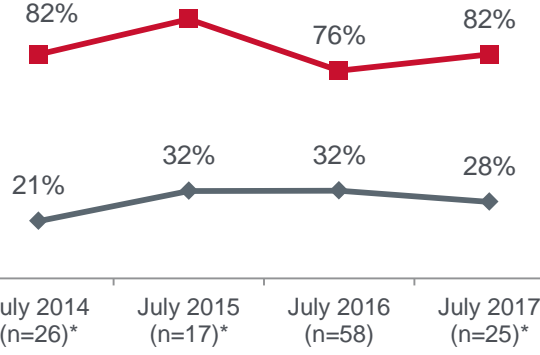
Stampede Parties



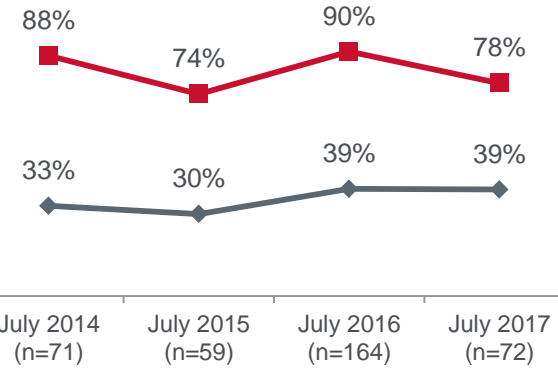
Pleasure



Business



Airport



◆ Very Satisfied ■ Total Satisfied

✓ Total satisfied ratings have increased in 2017 for medical appointments. Very satisfied ratings are trending up for running errands over the Stampede period.

Base: Calgaryans who used taxi services within the past month or so (Prior to January 2016 'within the past 2 months')

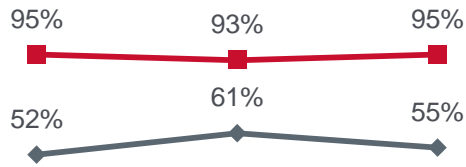
* Caution to be taken in interpretation of data due to small sample size

Q3. Overall, how satisfied are you with the taxi services you received over the past month or so? (Prior to January 2016 'Within the past two months')



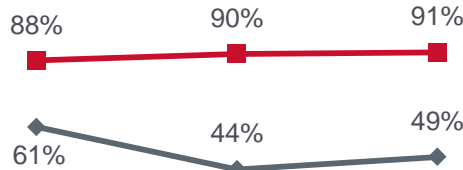
Satisfaction by Trip Purpose Trends Over the Past Year

Medical Appointments



January 2017 (n=47)* Spring 2017 (n=48)* July 2017 (n=23)*

Running errands



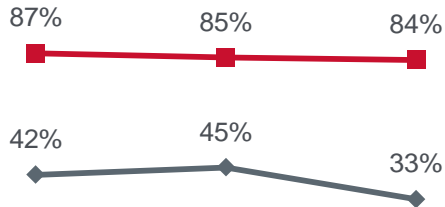
January 2017 (n=49)* Spring 2017 (n=30)* July 2017 (n=25)*

Stampede/Holiday Parties**



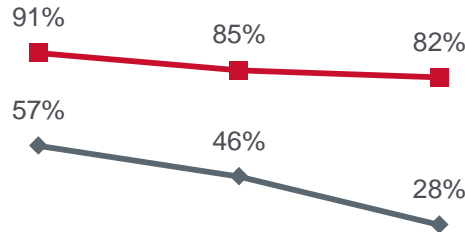
January 2017 (n=142) July 2017 (n=49)*

Pleasure



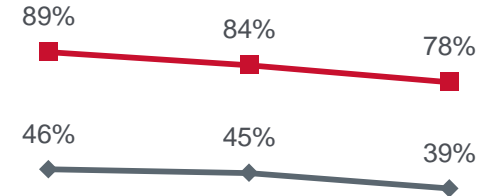
January 2017 (n=126) Spring 2017 (n=171) July 2017 (n=68)

Business



January 2017 (n=38)* Spring 2017 (n=80) July 2017 (n=25)*

Airport



January 2017 (n=166) Spring 2017 (n=179) July 2017 (n=72)

◆ Very Satisfied ■ Total Satisfied

- ✓ Total satisfied ratings are trending up for running errands
- ✓ Satisfaction ratings are trending down for taxis used to or from airport

Base: Calgarians who used taxi services within the past month or so
 *Caution to be taken in interpretation of data due to small sample size
 **Calgarians did not mention Stampede/Holiday parties in Spring 2017

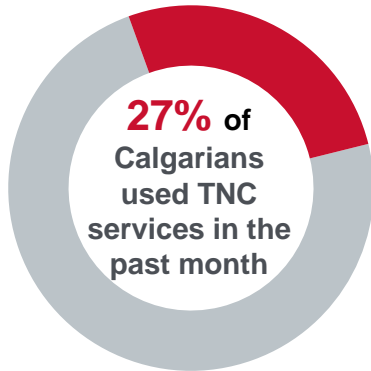
Q3. Overall, how satisfied are you with the taxi services you received over the past month or so?

Transport Network Companies

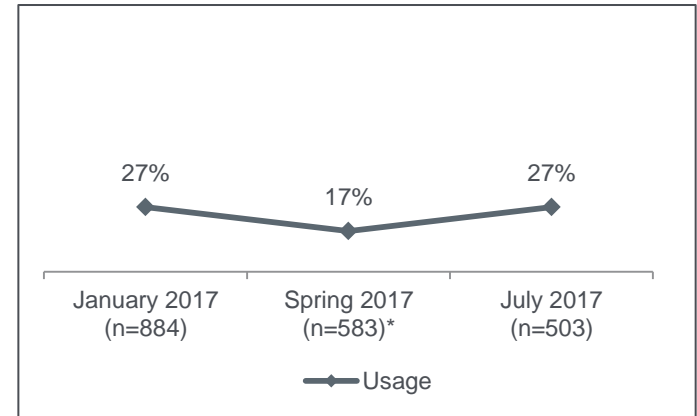


Usage of TNC Services – Past Month

TNC Usage
- Past Month -



Trends Over Time



- ✓ More than one-quarter (27%) of Calgarians used TNC services in the past month.
- ✓ Usage of TNC services among Calgarians decreases with age. Usage is higher among Calgarians who are employed and/or have a University education.
- ✓ Usage of TNC services over the stampede period is similar to Christmas holiday period.
- ✓ TNC usage has increased since Spring 2017.

Base: Calgarians (n=503)

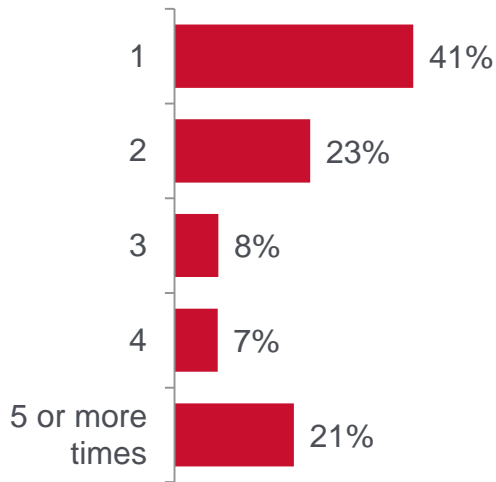
*Indicates usage in the past year

Q4. Within the past month or so, that is, approximately how many times have you used TNC services in Calgary? Q3. Within the **past year**, approximately how many times have you used each of the following types of services in Calgary?

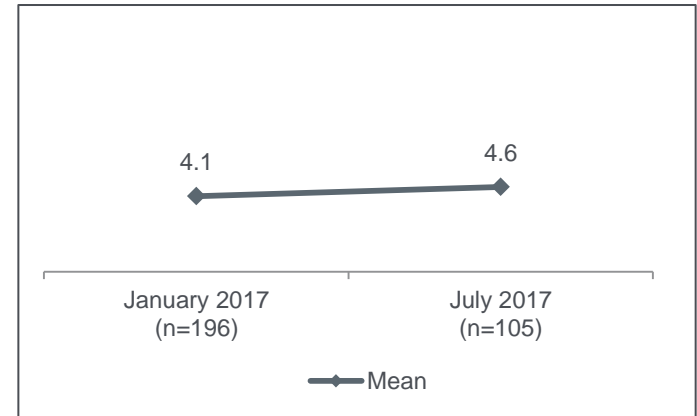


Frequency of Using TNC Services – Past Month

Trips over the past month



Trends Over Time



- ✓ TNC users used Calgary's TNC services 5 times (on average) within the past month or so.
- ✓ Average trips over the past month is on a rise since January 2017.

Base: Calgaryans who used TNC services in the past month or so (n=105)

Q4. Within the past month or so, that is, approximately how many times have you used TNC services in Calgary?



Purpose of Using TNC Services – Past Month Trends Over the Past Year

Purpose of using TNC	January 2017 (n=196)	July 2017 (n=105)
Pleasure – social functions (excluding holiday parties)	34%	48%
To get home	44%	42%
To attend Stampede/holiday parties or events	29%	26%
Airport	17%	14%
Get to work	15%	13%
Business	9%	12%
Running errands	9%	9%
Medical appointments	6%	5%

Over the past month, TNC users primarily used the services:

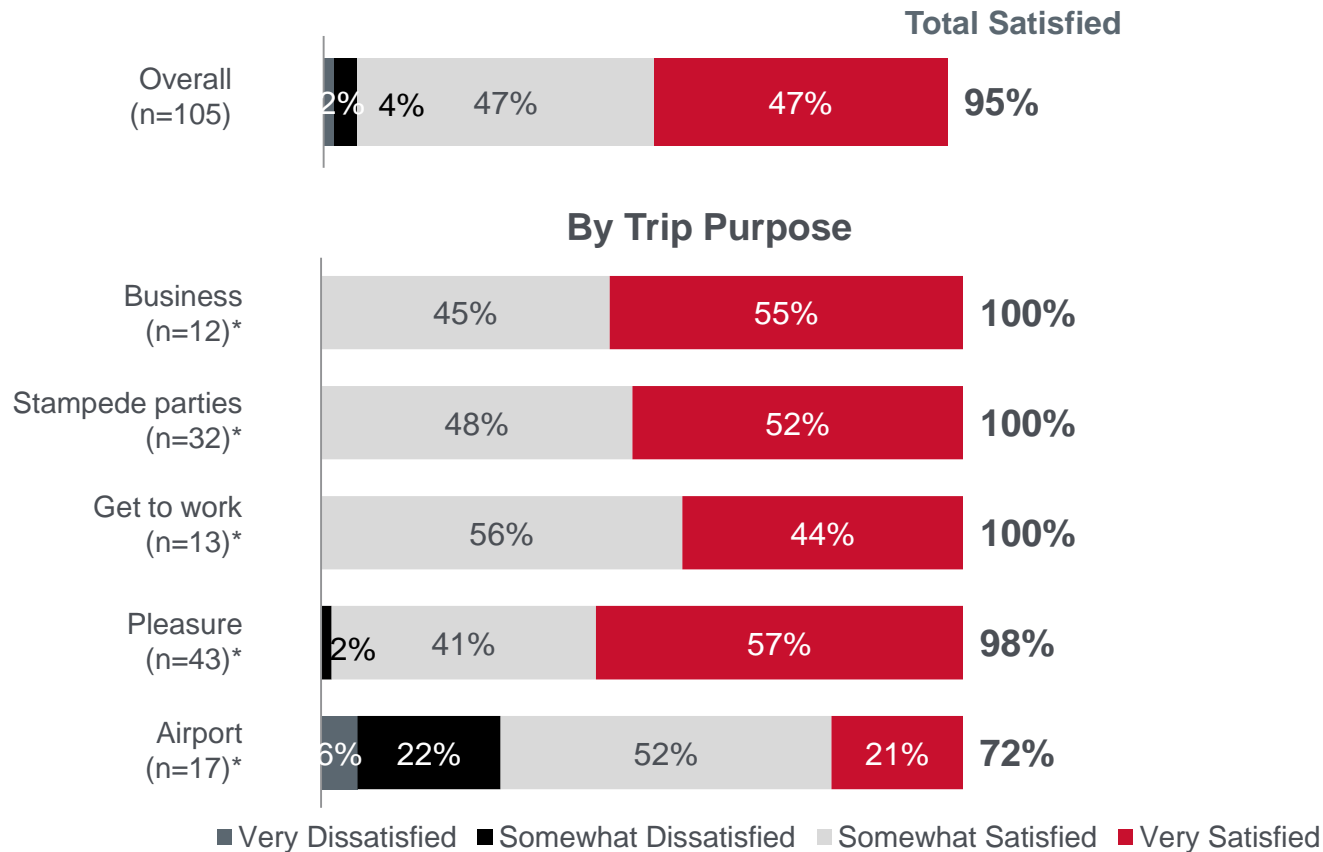
- ✓ for pleasure
- ✓ to get home

Usage of TNC services for pleasure has increased since January 2017.

Base: Calgarians who used TNC services within the past month or so
 Mentions 1% or less for July 2017 not shown / Multiple mentions allowed
 Q5. Thinking of the TNC services you used within the past month or so, for what purpose(s) did you use the service?



Satisfaction with TNC Services – Past Month



- ✓ A high majority of TNC users in Calgary are satisfied with the TNC services over the past month or so, including nearly half who are very satisfied.
- ✓ All TNC users who used the services for business, stampede parties and to get to work are satisfied with TNC services. Almost all TNC users who used the services for pleasure are satisfied. Users are less satisfied with the TNC services they used to go to or from the airport.

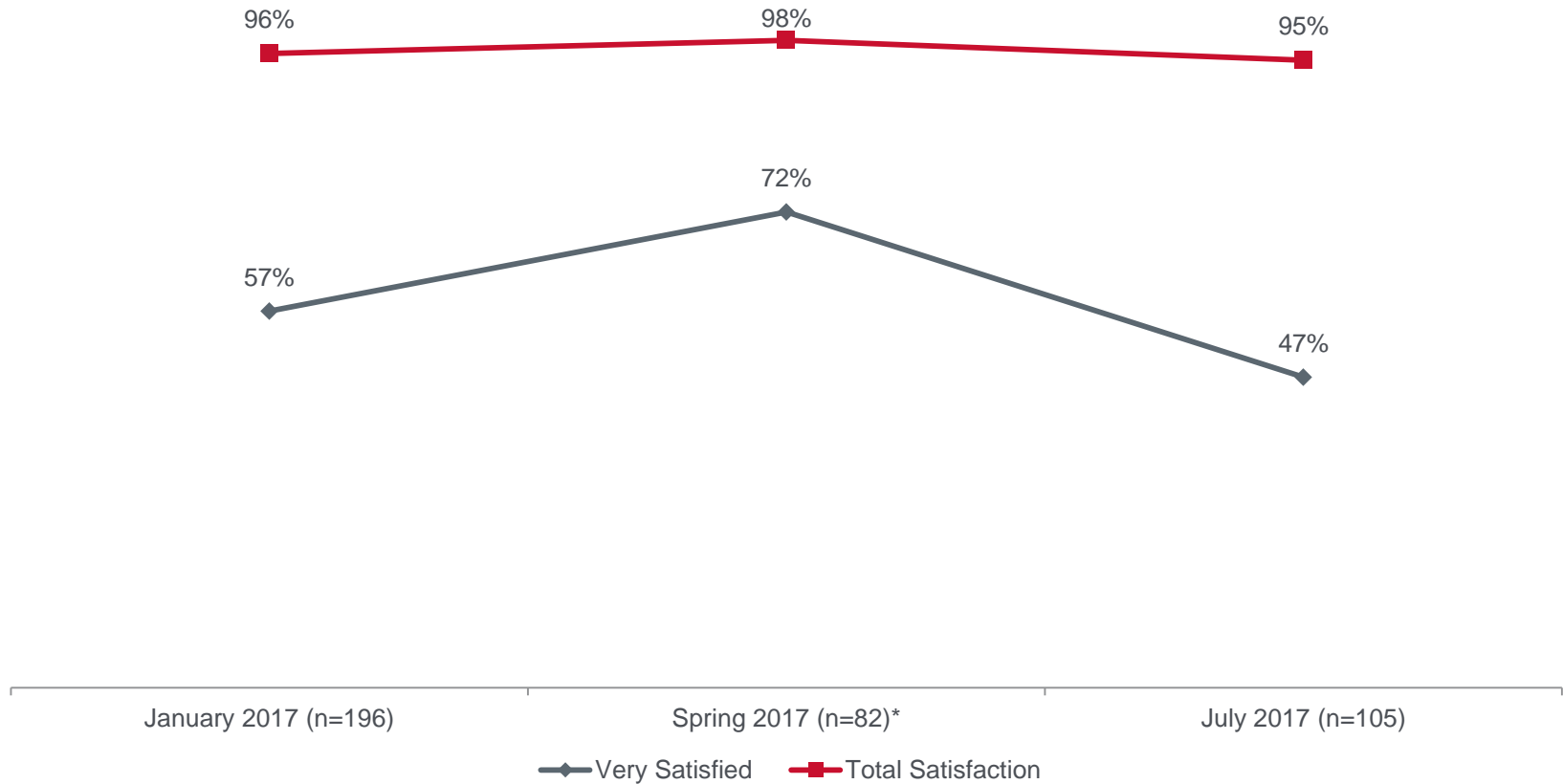
Base: Calgaryans who used TNC services within the past month or so

* Caution to be taken in interpretation of data due to small sample size

Q6. Overall, how satisfied are you with the TNC services you received over the past month or so?



Overall Satisfaction with TNC Services Trends Over the Past Year



- ✓ Overall satisfaction with TNC services is consistent over the past year.
- ✓ Very satisfied ratings have decreased in July 2017.

Base: Calgarians who used TNC services within the past month or so

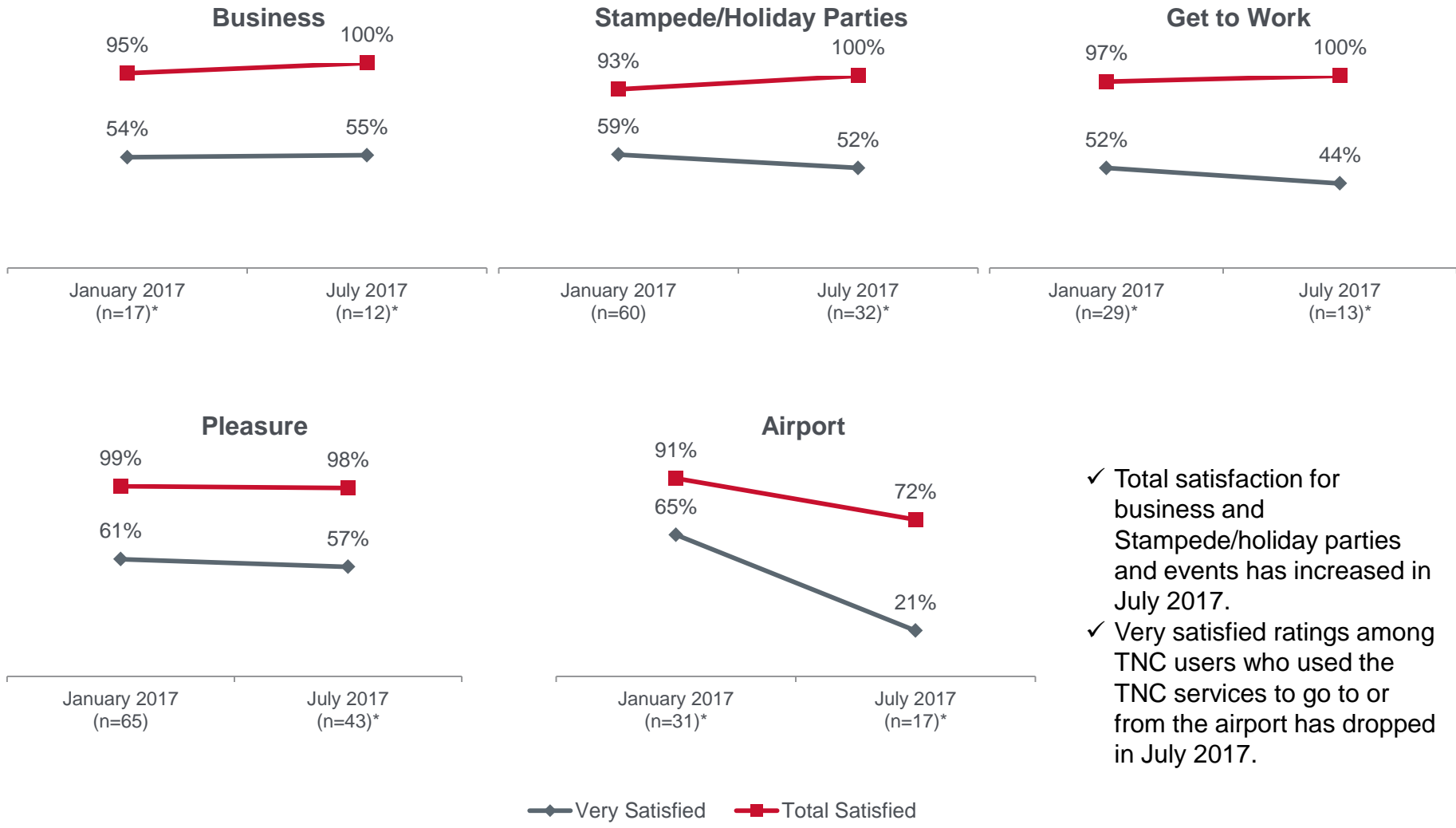
* Base: Calgarians who have used TNC services within the past year

Q3. Overall, how satisfied are you with the TNC services you received over the past month or so?

(Spring 2017) Q25a. Overall, how satisfied or dissatisfied are you with the TNC services you received in Calgary over the past year?



Satisfaction by Trip Purpose Trends Over the Past Year



- ✓ Total satisfaction for business and Stampede/holiday parties and events has increased in July 2017.
- ✓ Very satisfied ratings among TNC users who used the TNC services to go to or from the airport has dropped in July 2017.

Base: Calgarians who used TNC services within the past month or so

* Caution to be taken in interpretation of data due to small sample size

Q6. Overall, how satisfied are you with the TNC services you received over the past month or so?

Profile of Respondents



Profile of Respondents

Calgarians	(n=503)
Gender	
Male	50%
Female	50%
Age	
Between 18 and 24	10%
Between 25 and 34	23%
Between 35 and 44	20%
Between 45 and 54	20%
Between 55 and 64	14%
Between 65 and 74	10%
75 or older	3%
Marital Status	
Single	29%
Married	45%
Common law	15%
Divorced	6%
Widowed	2%
Separated	1%
I prefer not to answer	1%
Age of Children in Household	
Yes: 12 years of age and OLDER ONLY	8%
Yes: 12 years of age and older AND younger than 12 years old	5%
Yes: YOUNGER than 12 years old ONLY	19%
No children under 18 years old at all in the household	65%
I prefer not to answer	3%

Calgarians	(n=503)
Education	
High school, general or vocational (8 to 12 years)	20%
College (pre-university, technical training, certificate, accreditation or advanced diploma (13-15 years))	25%
University certificates and diplomas	9%
University Bachelor (including classical studies)	31%
University Master's	11%
University Doctorate (PhD)	2%
I prefer not to answer	1%
Occupation	
Office worker	12%
Personnel specialized in sales	5%
Personnel specialized in services	4%
Manual workers	3%
Skilled, semi-skilled workers	6%
Science and technologies workers	5%
Professionals	18%
Managers/administrators/owners	8%
Homemaker	5%
Student (full-time or whose studies take up most of his/her time)	3%
Retired (Pre-retired or annuitant)	15%
Unemployed (unemployment, welfare)	7%
Other	5%
I prefer not answering	2%

Calgarians	(n=503)
Household Income	
\$19,999 or less	4%
Between \$20,000 and \$39,999	11%
Between \$40,000 and \$59,999	16%
Between \$60,000 and \$79,999	16%
Between \$80,000 and \$99,999	13%
\$100,000 or more	28%
I prefer not to answer	12%
Language	
French	4%
English	79%
Other	4%
English and French	2%
French and other	1%
English and other	7%
Other and other	3%
I prefer not to answer	1%