



**Taxi Research
Partners**
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City of Houston Taxi Customer Satisfaction Survey

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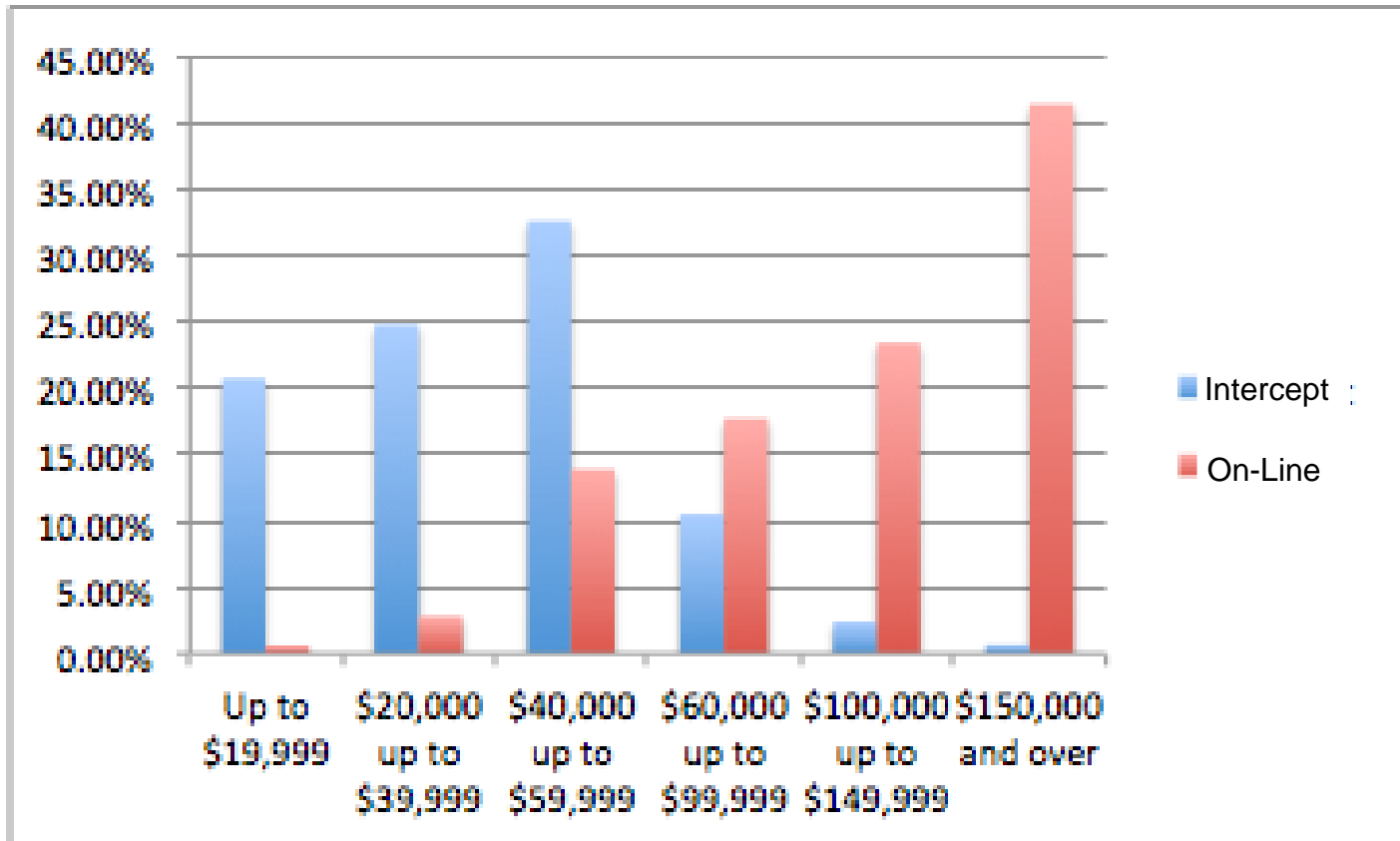
Passionate about taxis

Project overview

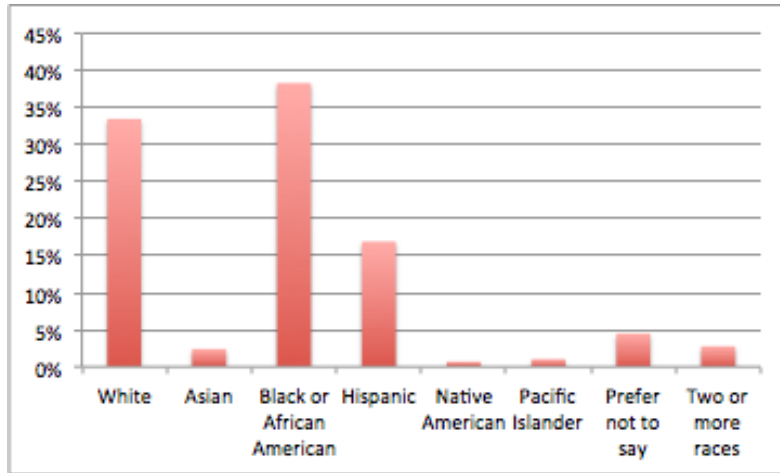
- Delivered as a part of wider taxicab study
- Public Intercept surveys undertaken on street using tablet computers
- On-line survey also used*
- Used 'last trip' approach to identify wide range of taxi use experiences
- Cross section of demographics, including car and non-car users.

* On-line survey revealed atypical demographics and 'at-risk' data

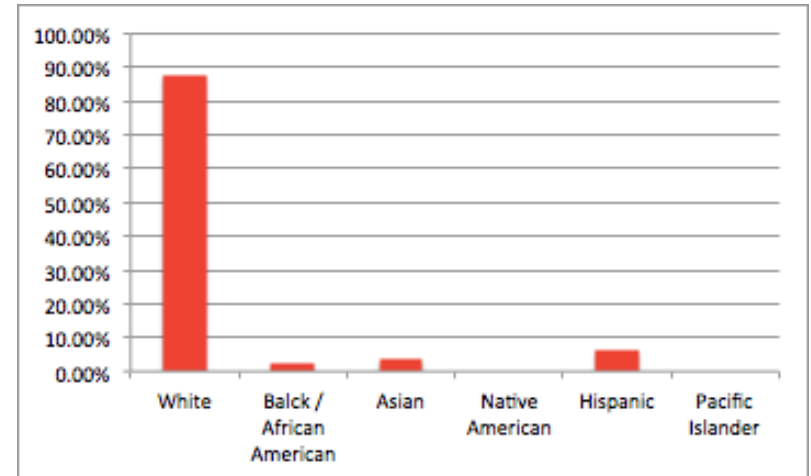
Intercept and On-Line Respondent Income



Intercept and On-Line Respondent - Race




Intercept

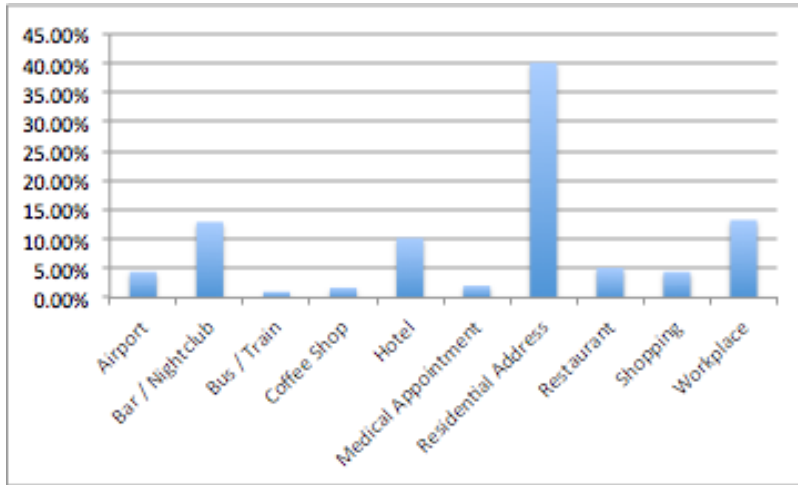


On-Line

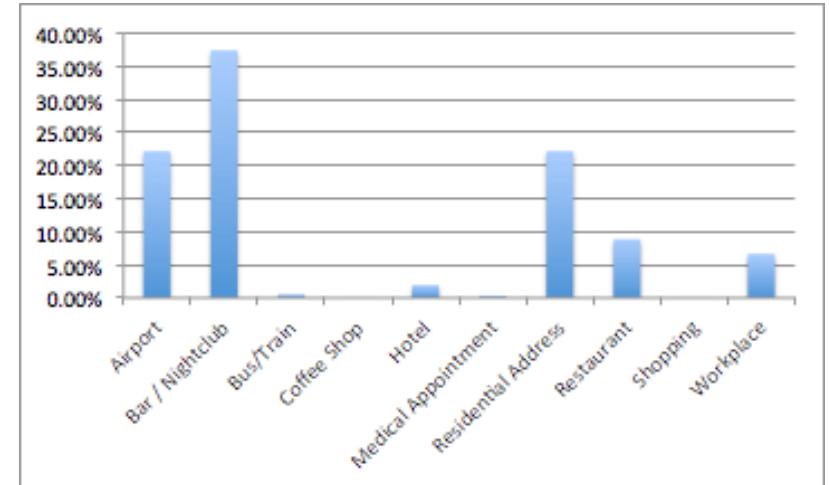
Methodology

- The survey was designed to provide a snap-shot review of public attitudes to taxi use, focused on quality metrics
 - Last Trip Question design
 - Allows interpretation of results by trip type / trip origin
 - Allows comparison of ‘intending new entrant’ user vs incumbent user
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Trip Origin

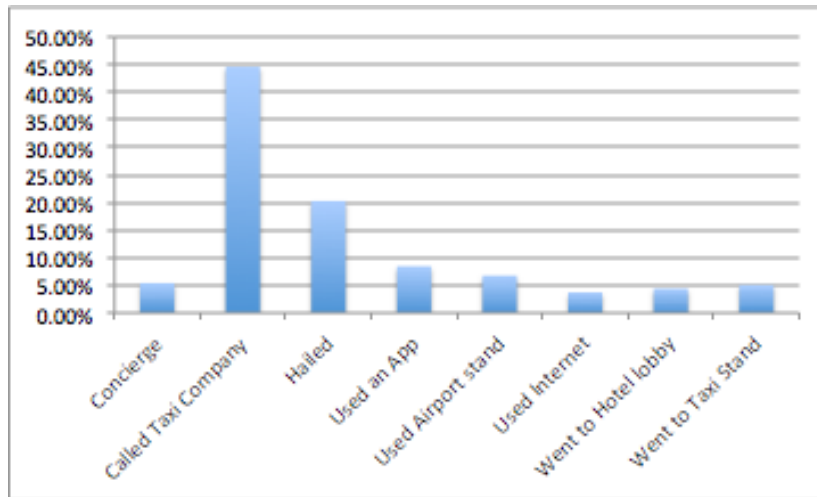


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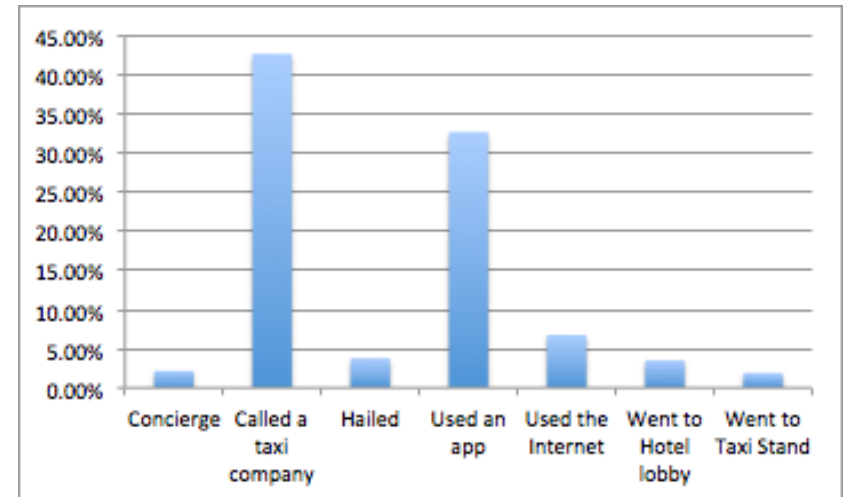


On-Line

Engagement Method

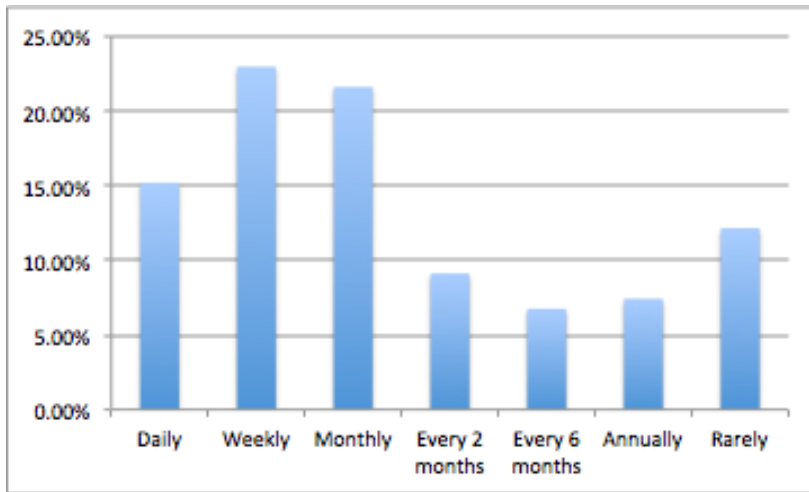


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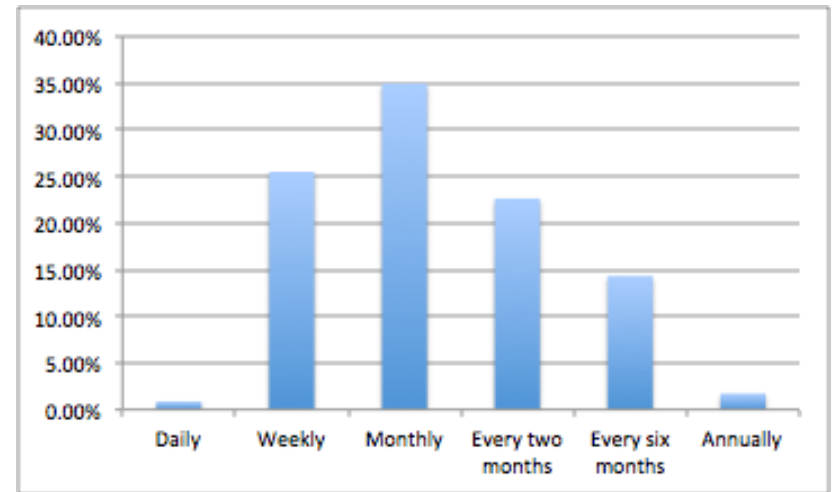


On-Line

Frequency of taxi use

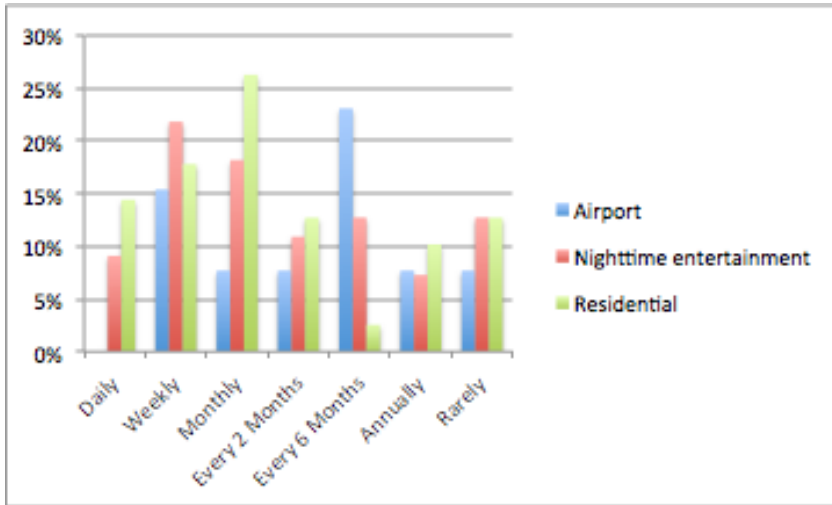


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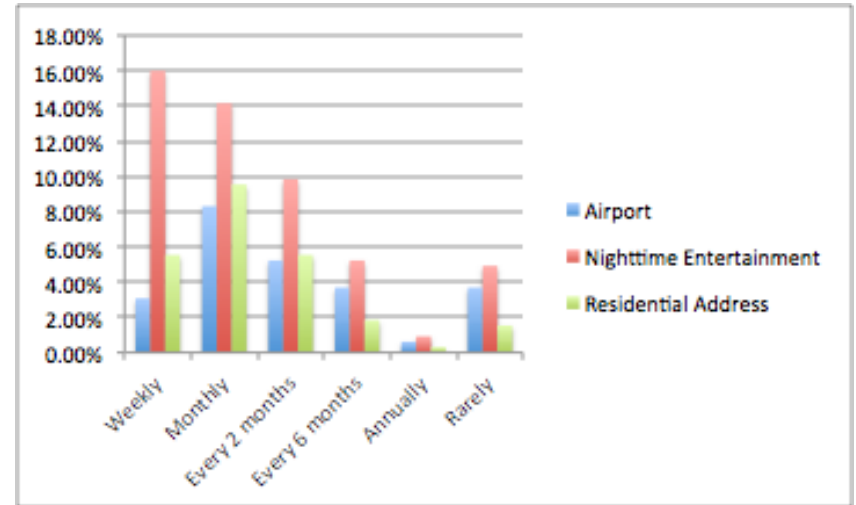


On-Line

Use by trip Origin

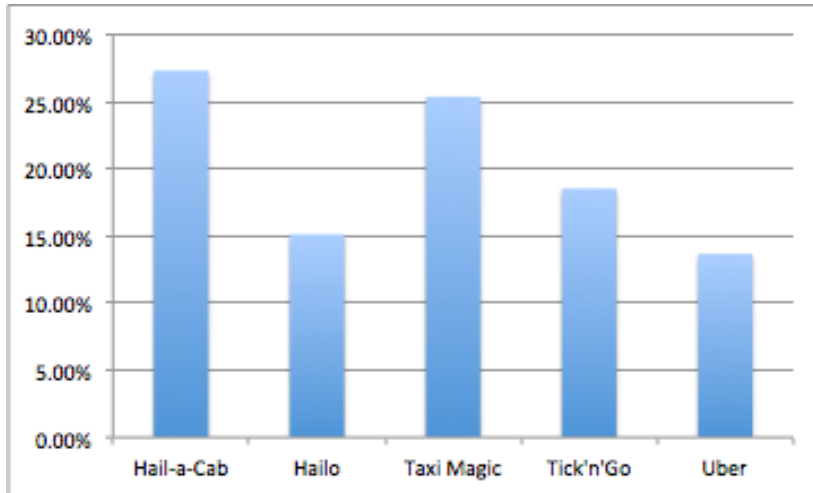


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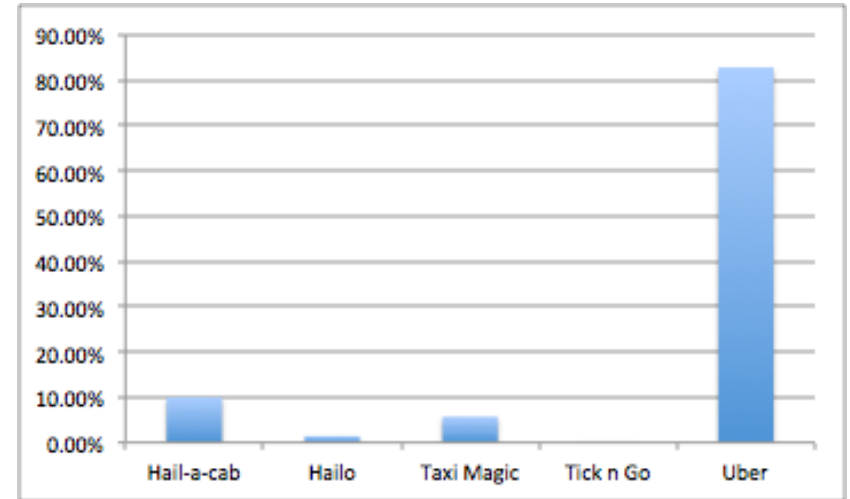


On-Line

App Use



Intercept




On-Line

Review of respondents

Intercept Survey

- Wide user demographics
- Most Income groups (fewer high income)
- Mixed trip origins, 40% residential
- Mixed engagement, 45% called taxi company
- Frequent users of taxis (Daily / Weekly)

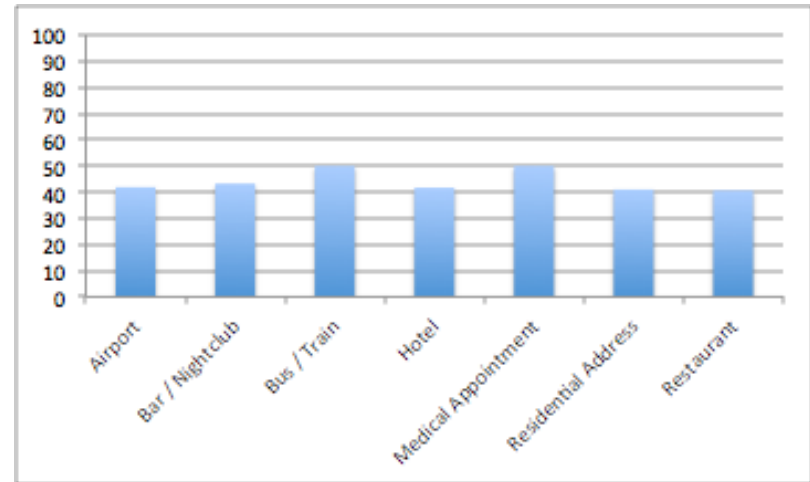
On Line Responses

- High and very high income respondents
 - Bias toward single culture
 - Bar / Nightclub primary use
 - Still reporting high taxi company use
 - less frequent use (monthly)
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Outputs - Service Quality Satisfaction Level

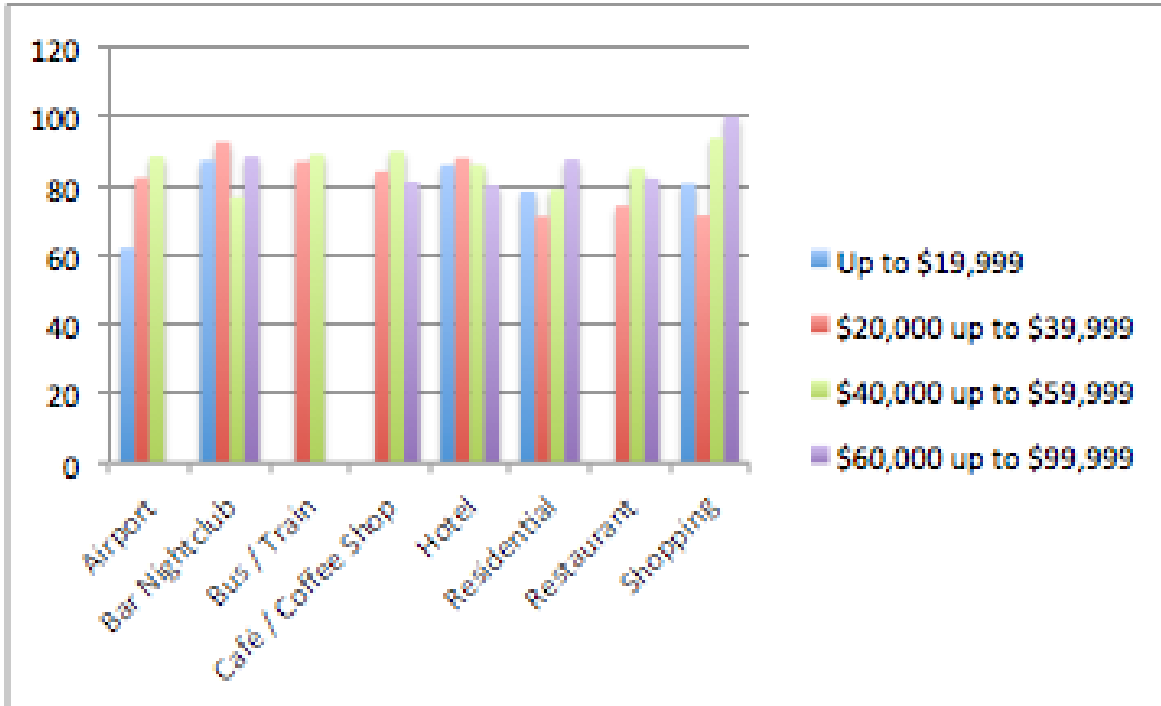


Intercept



On-Line

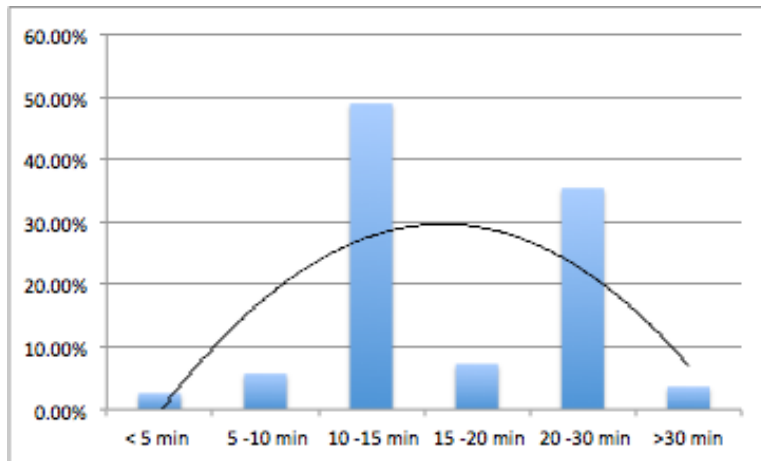
Satisfaction by income and trip purpose



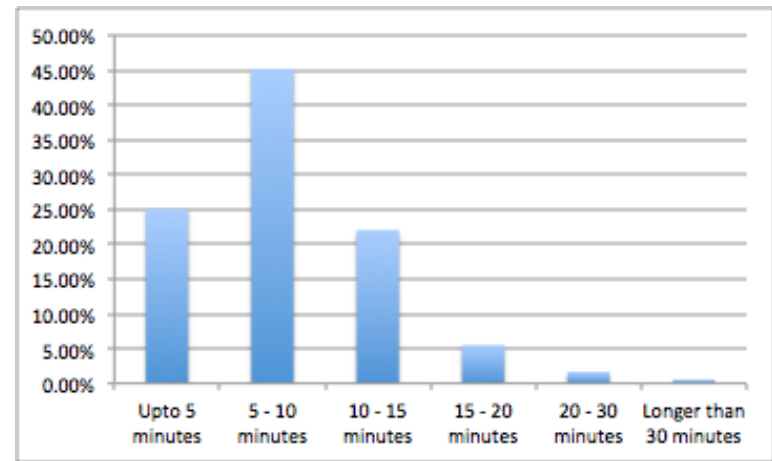
Intercept

Expectation - Reasonable Waiting Times

Travel weekend nighttime



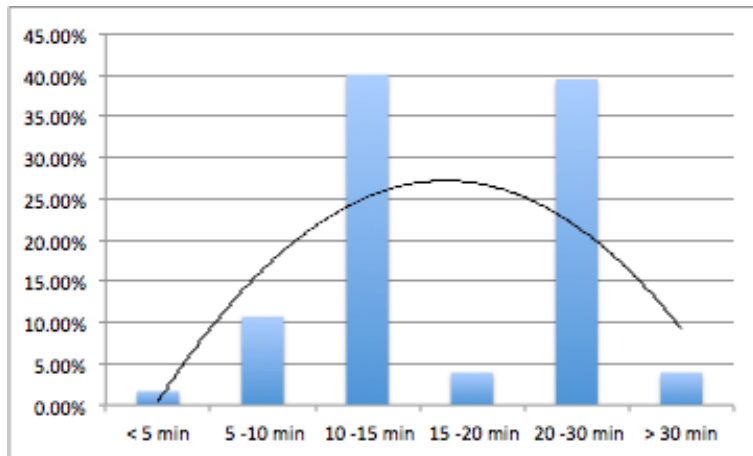
Intercept



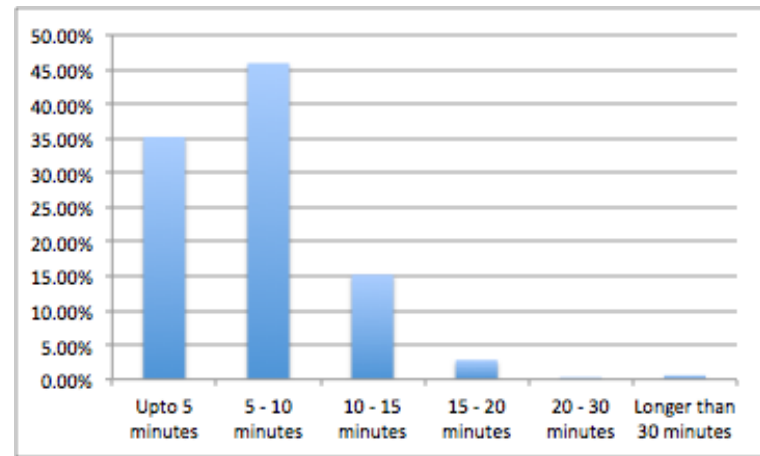
On-Line

Expectation - Reasonable Waiting Times

Travel weekday middle of day

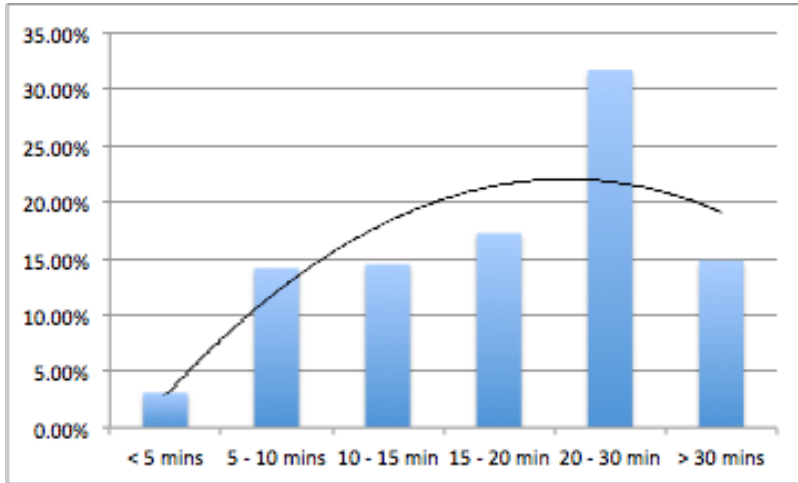


Intercept

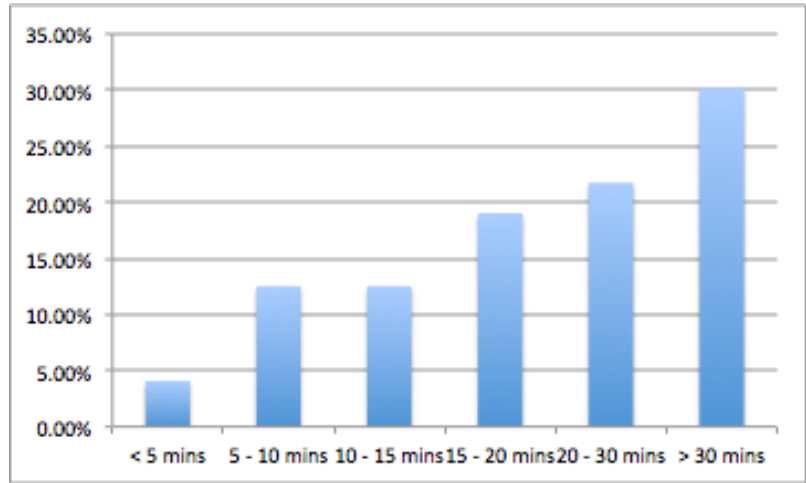


On-Line

Outputs - Perceived waiting times




Intercept

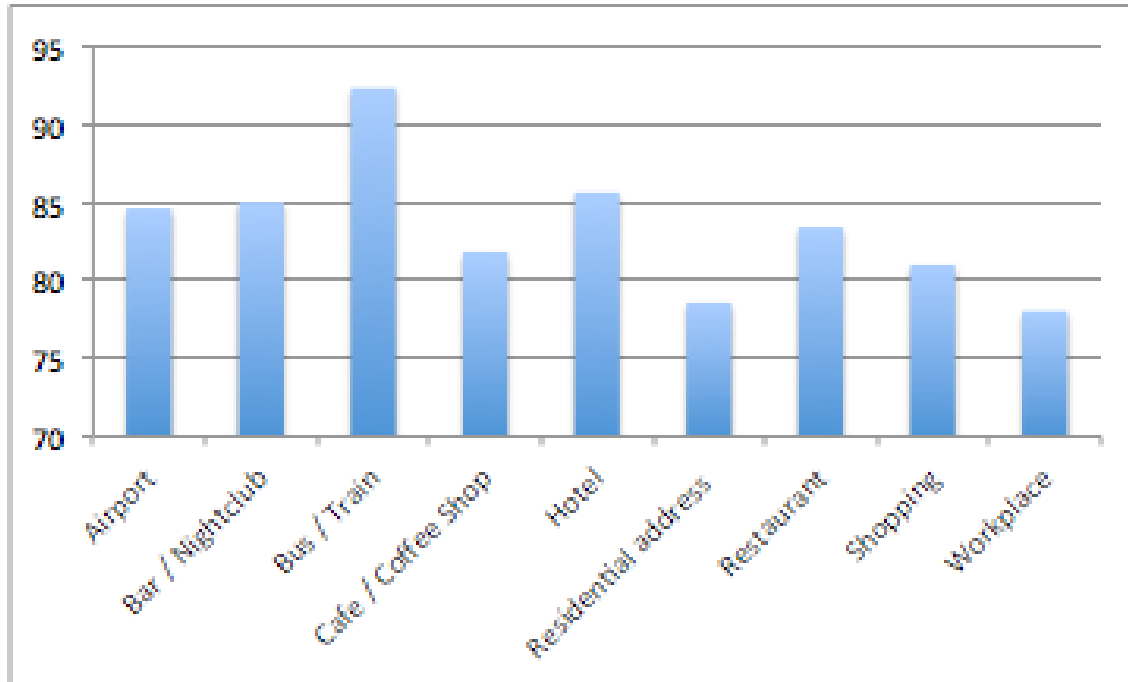


On-Line

Review of Service Quality - waiting times

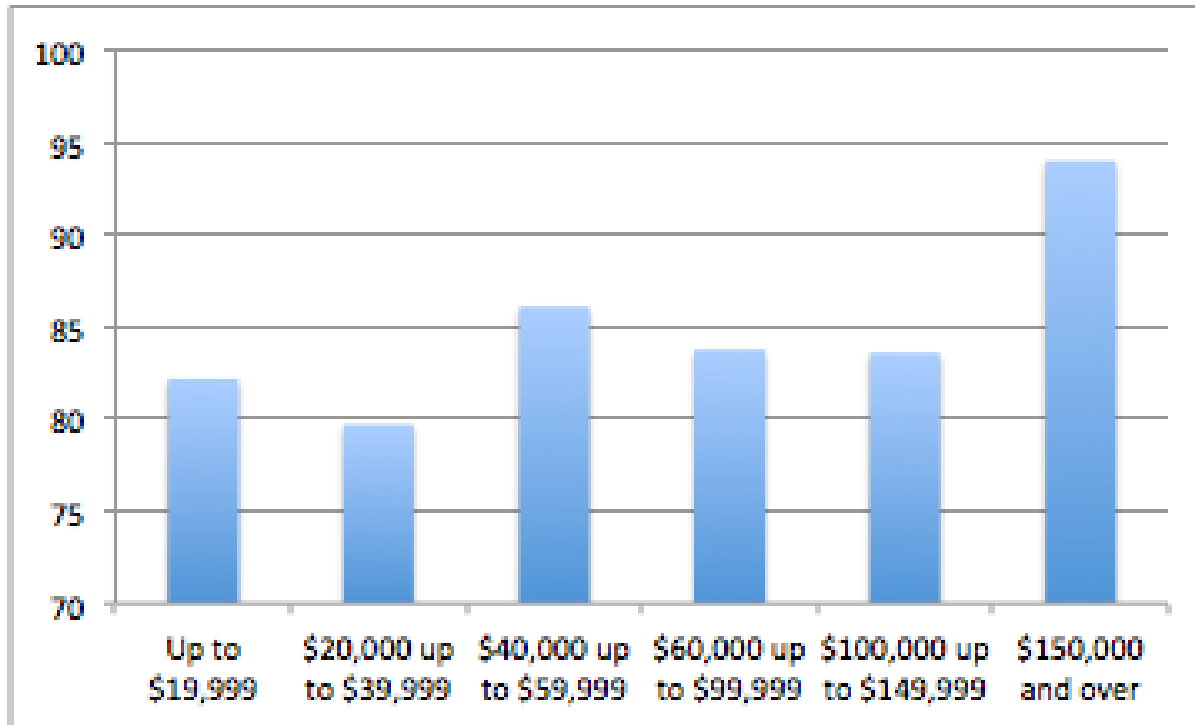
- Satisfaction level high amongst intercept respondents. Highest levels of satisfaction amongst passengers connecting to/from train or bus
 - Lowest level of satisfaction when traveling from a residential address
 - Reasonable waiting time expectations MUCH more critical amongst on-line respondents
 - Perceived delivery time WORSE amongst on-line respondents
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Outputs - Vehicle Quality Satisfaction Level / trip origin



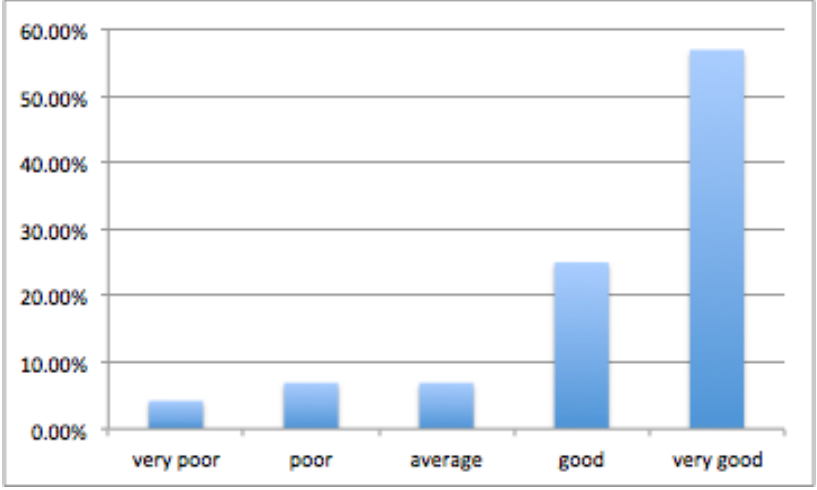
Intercept

Outputs - Vehicle Quality Satisfaction Level / Income Level

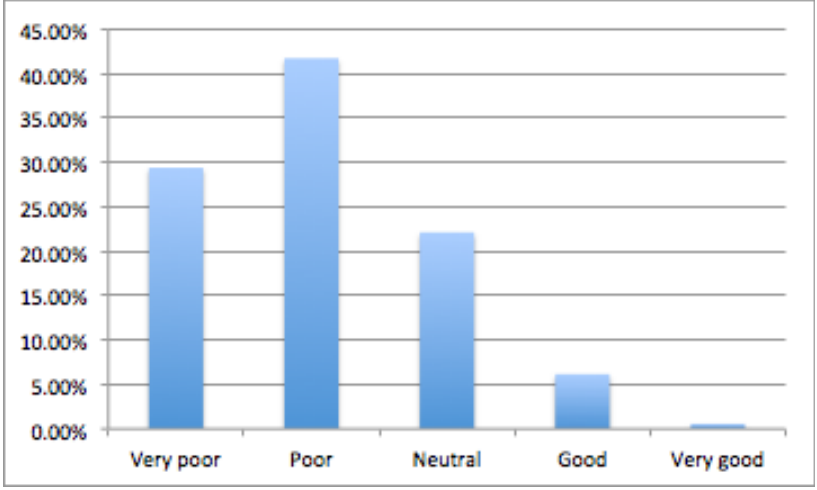


Intercept

Outputs - Vehicle Quality

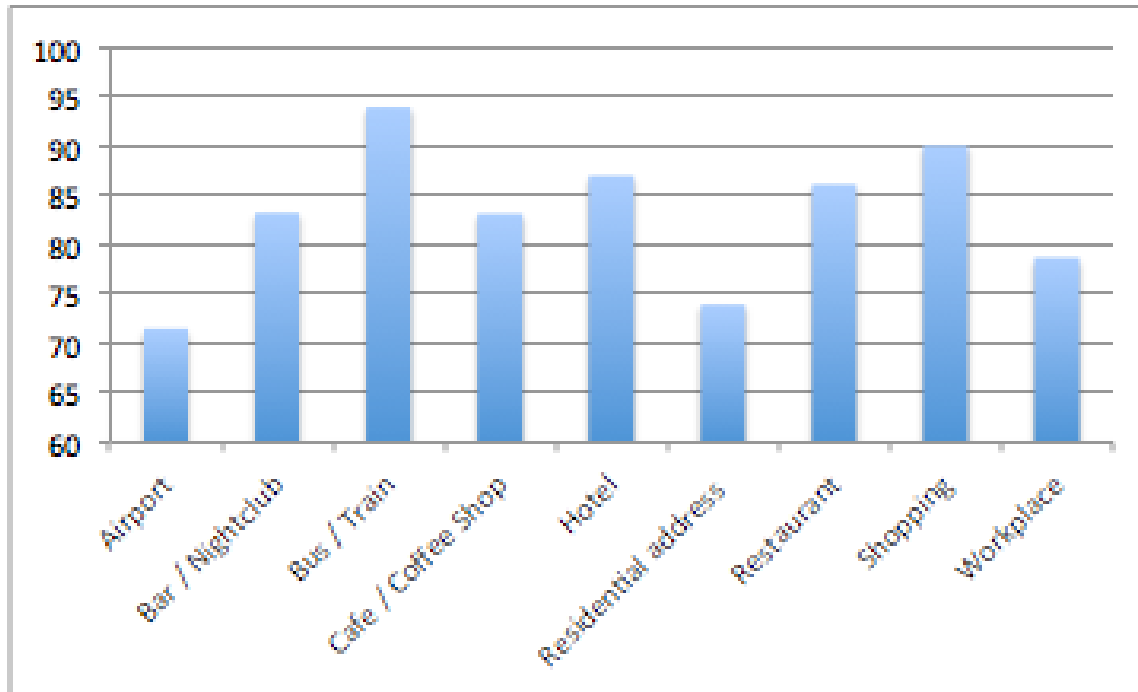


Intercept



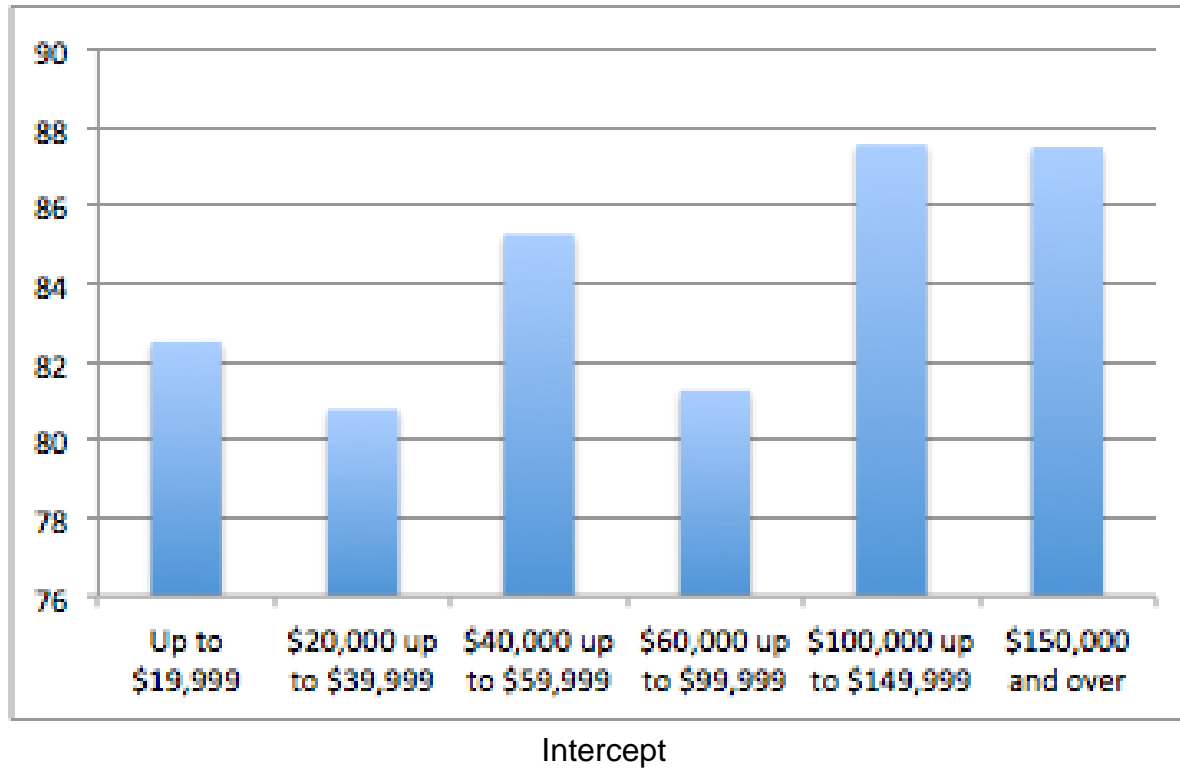
On-Line

Outputs - Driver Service Satisfaction Level / Trip Origin




Intercept

Outputs - Driver Service Satisfaction Level / Income Level

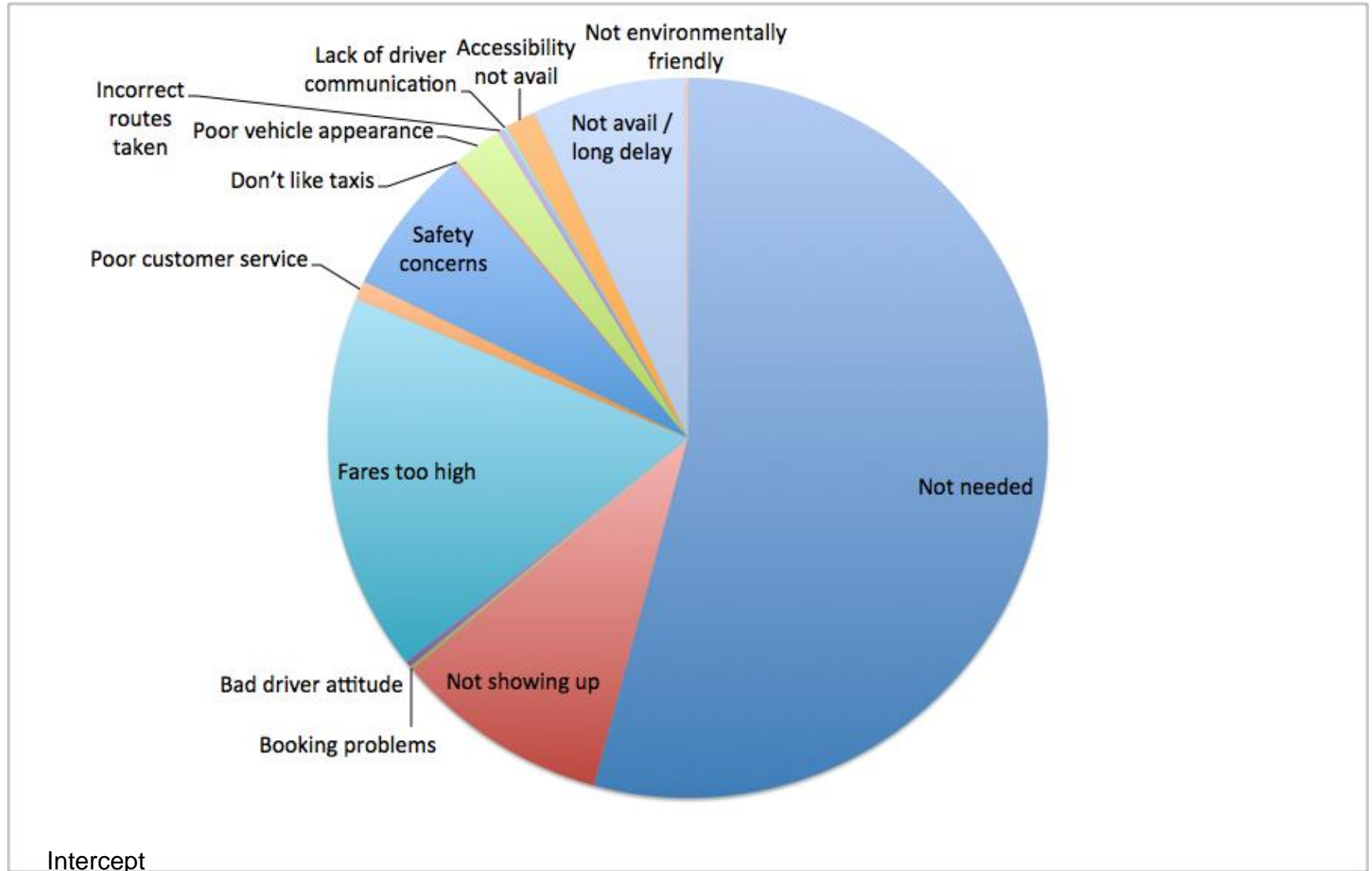


Review of Vehicle and Driver Standards

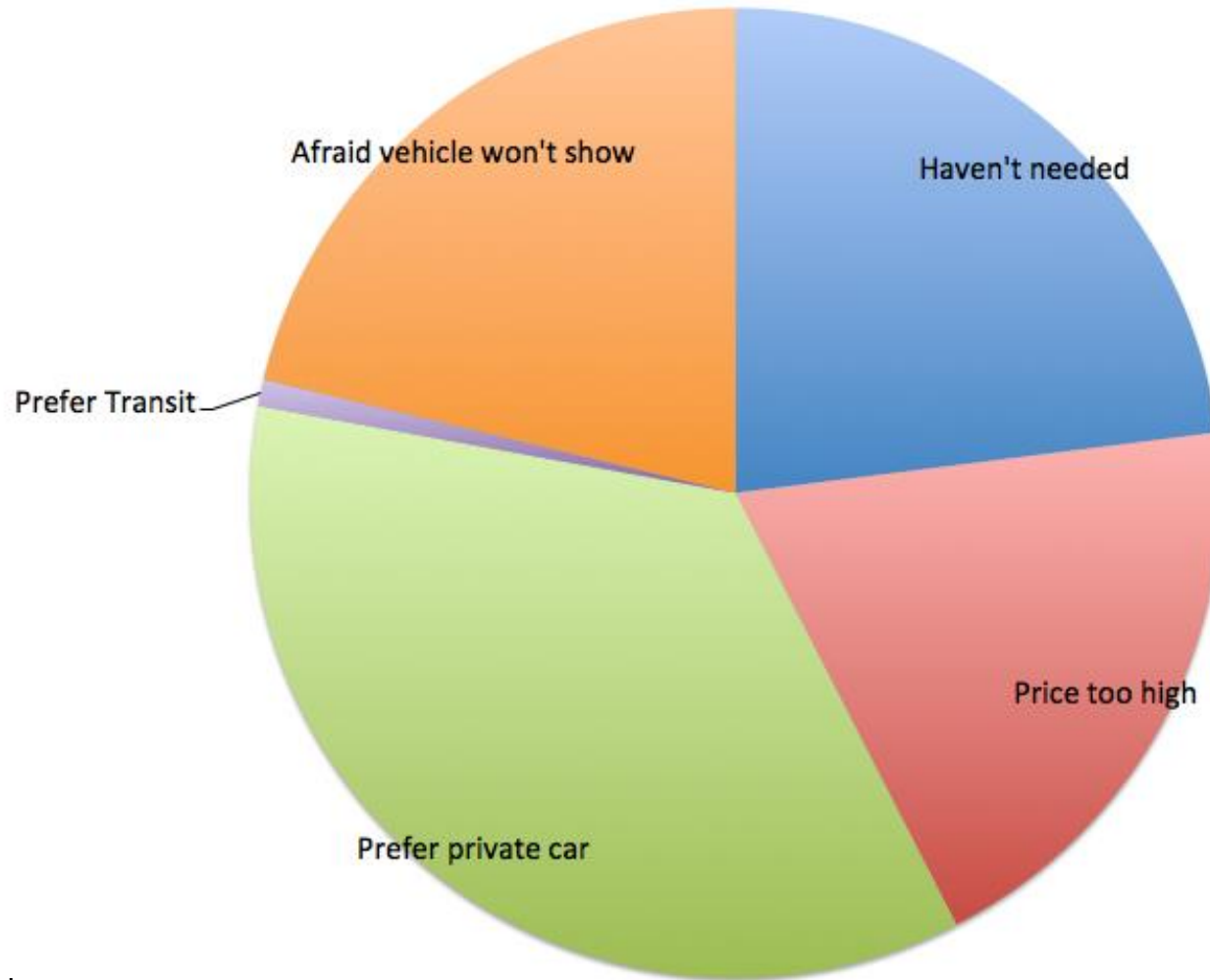
- Vehicle quality generally felt to be very satisfactory / good
 - **Lowest** Intercept vehicle rating (77%) from residential users
 - No noticeable deviation by income groups **except** in highest income group who considered vehicle quality to be higher

 - Driver Service generally felt to be very satisfactory / good
 - **Lower** driver service scores from Residential and airport origins
 - Some variation by income but no bias at either end of income range
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Reasons for NOT using taxis



Reasons for NOT using taxis




On-Line

Overview, why NOT use taxis

Intercept Respondents

- Main reason against using taxis, not needed
- Negative Reasons in decreasing order - Fares too high, Not showing up, Safety Concerns

On-line Respondents

- Main reason against using taxis, Prefer private car
 - Negative Reasons in decreasing order - Not showing up, Price too high
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Key Take Aways

- Distinct split in market between traditional taxi users and potential new entrant users
 - Taxi Market spread evenly across most demographics
 - Taxi Market spread evenly across most trip origins
 - Issue in service to residential neighborhoods, reflects focused supply
 - New Entrant market focused on high income users
 - On-line responses limited to specific cultural demographic
 - On-line responses focused on bar/night club traffic
 - Need to understand transfer points and choices between traditional and new modes
 - Need to enhance service in some residential areas
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