TTLF

Taxi Research Partners
Demand | Market | GIS | Fares

King County

City of Seattle and King County Taxi, For Hire Vehicle and Limousine Services Demand Study

FINAL REPORT

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1. Acknowledgements

The Tennessee transportation and logistics foundation (TTLF) and Taxi Research Partners (TRP) acknowledge the kind of input from many contributed to the study. We acknowledge and thank the city of Seattle and King County for their commission and significant support in the delivery of the work. We would also underline the significance of input from the local taxi trade, other transportation providers, and key stakeholders for which we are grateful and appreciative.

2. Introduction

The Tennessee Transportation and Logistics Foundation and the Taxi Research Partners, the research team, are pleased to have been commissioned by the City of Seattle and King County to undertake a review of Taxi, For Hire Vehicle (FHV) and limousine service demand. Our brief required us to determine the nature of demand for Taxis and taxi-like services, the latter including established FHV services licensed locally; towncar/sedan services licensed by Washington State as short wheelbase limousines, known locally under a range of names including 'Limos' as well as by the name of their booking apps; and private vehicle share schemes, sometimes referred to locally as 'Rideshare', as well as by the name of the booking app. It should be noted that the term 'rideshare' is also applied to a defined practice of unpaid and unplanned provision of lifts, which lie outside the scope of this study.

For ease of description we adopted the terms: Taxi, FHV, Limo and Rideshare in our surveys, which we felt to be the most commonly applied terms in Seattle and King County, and have used the same terms throughout this report. We also use the term 'taxi market' as a global description encompassing Taxis, FHVs, Limos and Rideshare, as each mode competes within the same market for trips. Analysis addressing taxi use alone is identified as such in the report.

The study included a series of surveys, and associated analysis, intended to provide an overview of current demand, the structure of the market, and issues arising therefrom. In so doing this study is intended to provide a better understanding of the demand for Taxis and Taxi-like services to help support policy formulation with information about market structure, patterns of use, and service quality.

The analysis of a taxi market, both in terms of the supply of vehicles and determinants of demand, requires the measurement of quantitative and qualitative factors. In order for the research team to perform an in-depth analysis of the industry, we engaged with the travelling public; key stakeholders, including the taxi industry and its regulators; and institutions, typically those responsible for booking taxi and similar transport on behalf of their clients.

A series of surveys was undertaken to determine current demand within the taxi market, and linked to an analysis of operational data, both that collected by the licensing authority and additional data provided to the research team by larger taxi operators. Survey data collection was undertaken in the spring and summer of 2013, with operating information and dispatch records provided for the same time period.

This report sets out the methodology by which the research team undertook surveys, analysis of the results and their interpretation in terms of policy development. We start the reporting in section 3 considering the structure of the market in the City of Seattle and King County.

3. Industry Structure and Service types

3.1 Seattle and King County Licensing Structure

The City of Seattle lies wholly within King County, with both city and county undertaking regulatory and licensing functions associated with their respective taxi industries. The two licensing authorities share a number of functions, reflected both in the structure, testing and control mechanisms in place. This said, the two maintain distinct differences in the nature of service permitted and some restraints placed upon the taxi market. Taxis and FHVs are controlled upon similar lines between the authorities, discussed below, while Limos are controlled at state level. 'Rideshare' vehicles, a fourth category operating within the taxi market, do not fit within an easily defined regulatory structure and currently operate outside the taxi market regulatory structure. A fifth vehicle type may also be defined in respect of local short term car rentals, which arguably operate within the same market, and include 'Car2Go', a popular app based self drive vehicle. Local short term rental operates on a self drive basis without engaging a driver for hire. Figure 1 illustrates the primary vehicle types operating in the taxi market

Figure 1: Vehicle types operating in the taxi market for Seattle and King County

The mixed nature of licensing and regulation, at city, county and state level has an impact on the competitive nature of the market, the functions served by differing vehicle types within and ease of access to the taxi market, and regulated restraints placed upon the market. Figure 2 sets out the numbers of vehicles of each category operating within the City and the County, and the nature of the controls placed on each.

Figure 2: Licensing controls and vehicle license numbers by vehicle category

	Numbers of Vehicles	Permitted to accept	Quantity Controls	Safety Controls	Economic Controls
TAXIS	City Only: 336 Dual Licensed: 352 County Only: 240	Dispatched / pre-arranged, Hailed, Cabstand	Yes, License Caps set by City and County	Yes, vehicle inspection	Yes, defined meter rate
FHV	City Only: 1, Dual Licensed: 198, County Only: 170	Dispatched / pre-arranged (Dual licensed and county vehicles may be hailed outside city)	Yes, License Cap (City; no caps set by County)	Yes, vehicle inspection	Flat Fare
LIMO	1102	Pre-arranged	No	Yes, vehicle inspection	Pre-set fare
RIDESHARE	Operate outside regulatory structure				

The relationship between the City of Seattle and King County is reflected in the presence of 'dual licensed' vehicles, being Taxis and FHVs permitted to operate in both the City and the County. City only licenses permit for the operation of a vehicle to pick-up within the City of Seattle alone; County only licenses permit pick-up in the county (excluding the City of Seattle) alone. There is no geographical limitation on drop-off location.

Limos do not face the same geographical restraint on operation, being licensed at state level, limos may pick-up and drop-off prearranged trips anywhere within Washington State. All vehicles, with the exception of Rideshare, are subject to safety inspection by the licensing authority. The inspection of limos has been delegated by the state (the competent licensing authority) to the City of Seattle along with the authority to enforcement all state laws pertaining to limousines. Other controls are noted with respect to rates charged: taxis operate with a defined meter rate, FHVs operate with flat fares, and Limos operate with prearranged fares; and to quantity restraints (also known as license caps) for Taxis and FHVs as set out in figure 2. There are no similar license restraints applied to numbers of Limos or Rideshare.

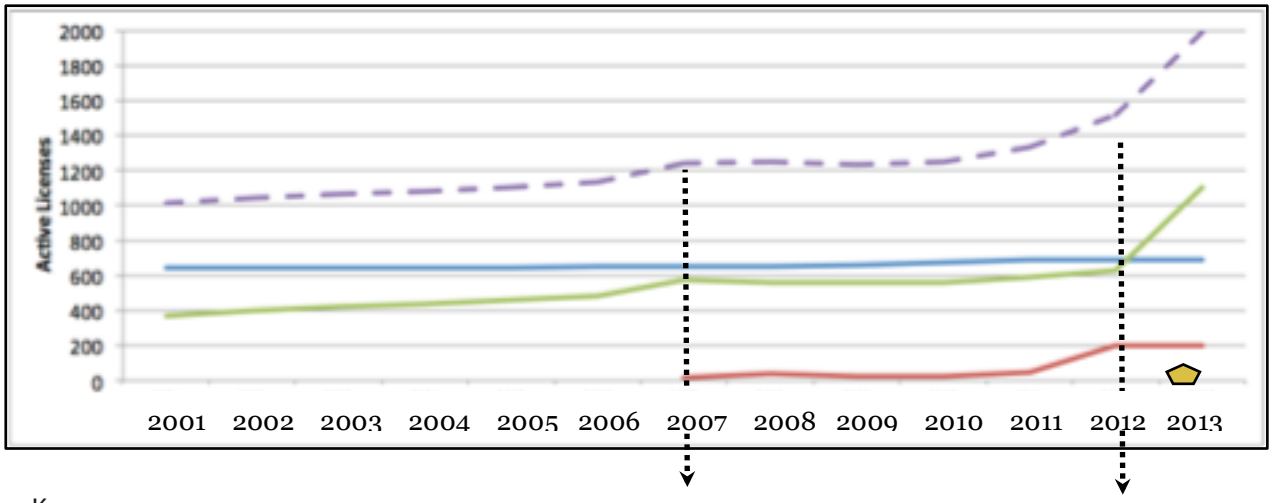
State licensed Limos, and unregulated Rideshare are not constrained to a specific number of licenses, and have seen significant growth over a short period of time, detailed in the next section. The distinction between these vehicle types and Taxis/FHVs, particularly in terms of license numbers, has an impact on the functioning of the taxi market.

3.2 Market Trends

The size of the taxi market, particularly the numbers of vehicles across defined vehicle categories displays distinct differences over time. Figure 3 illustrates the growth in vehicle numbers to date, and is displayed alongside a tabulation of the number of taxi specific trips made over the same period, figure 4. It can be noted that the market has not remained static over that period illustrated, but rather has grown reflecting changes in the number of Limos and FHV services available.

In contrast to the growth in Limo and FHV numbers, the number of taxis has remained remarkably constant across the measured period. With the exception of a small increase in taxi numbers resulting from the introduction of Wheelchair Accessible Taxis (WATs) to the taxi fleet, the number of taxis available has remained static while the number of alternative taxi-like services has increased. A very rapid increase in Limo licenses is noted in the period from 2012 to date, resulting in the total number of Limos available to the Seattle market overtaking and exceeding the total number of taxis licensed for pick-ups in the City of Seattle.

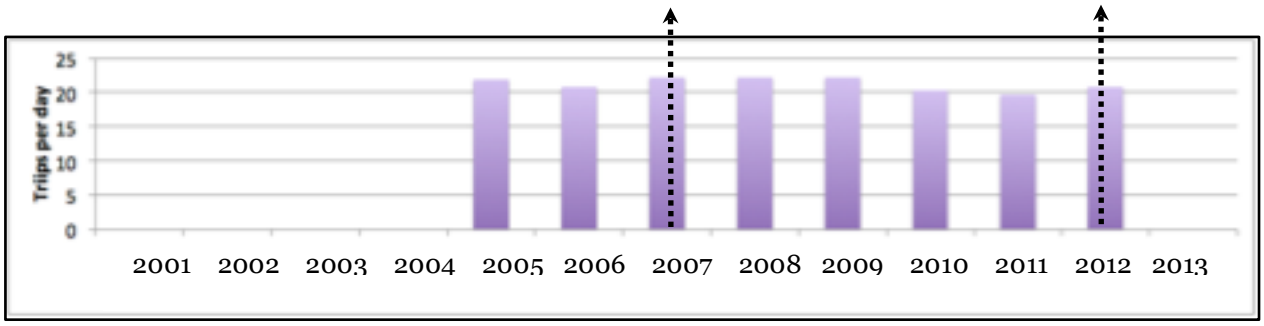
Figure 3: Numbers of licensed vehicles available for pickup in the city of Seattle



Key:

- Taxis
- FHV
- Limos
- Total numbers of vehicles licensed for pick-up in the City of Seattle
- Introduction of new app based Rideshare services

Figure 4: Mean Trips per day, Seattle Taxi vehicles



Source: Figures 3 and 4, City of Seattle taxi and FHV records, and State of Washington Limousine Records

Taxi trip number statistics have been collected, by the City of Seattle, continually in the period since 2005. Figure 4 tabulates the mean number of trips made by each vehicle in the period to 2012, and suggest that on average a Seattle taxi makes 20 trips per day. Two track points are also illustrated linking the growth of the total taxi market in 2007 and 2012, set out in figure 4, illustrating points of growth in the total number of taxi-like vehicles. The period between 2007 and 2012 are typified by a

slow, but accelerating, increase in the total number of vehicles licensed for pick up in the City of Seattle (figure 4), with only limited fluctuation in the mean numbers of trips made by taxis.

This suggests that the taxi has been able to maintain a relatively consistent level of business despite an overall increase in the number of taxi-like vehicles available. This is likely to reflect that an increasing market in rides has been shared between traditional taxis, with a constant number of trips, and newer vehicle types, attracting growth in the traditional market and additional latent demand. A more significant increase in the total market, derived almost entirely from rapid increase in the numbers of Limos, is observed in the period from 2012 to date, accelerating the total supply of taxi-like vehicles. It is highly likely that this growth will occur at the expense of the traditional taxi market, placing a downward pressure on the number of trips per day made by Taxis. Further pressure will develop from the introduction of new app-based Rideshare services, indicated by the presence of a yellow symbol in figure 3. The exact number of Ridesharing vehicles is difficult to assess with accuracy as these sit outside the current regulatory structure and are facilitated by a range of technology providers. Rideshare vehicles do not correspond to a classic 'fleet' structure; can vary in numbers, with significant increases in the numbers of rideshare vehicles available, without reference to a regulatory body. The research team sought fleet and operational information but was declined.

3.3 Market review

A dichotomy is observed between the numbers of vehicles available within the taxi market, including FHV and Limos, which has grown in the period since 2001, and a consistent and static number of taxis in the market, both in the City of Seattle and King County. The consistency in taxi numbers arises from the nature of tests applied to determine the total numbers of taxi licenses that may be issued, which is currently based on a measure of growth in total taxi revenue trips. The City may also give consideration to other factors that, in its opinion, reflecting increased demand for taxicab services. As the level of taxi revenue trips has remained consistent, there has been no identified need to change the numbers of taxi licenses issued. If observed from the viewpoint of the number of taxis alone, response rates have remained static; a measurement that may be interpreted as indicating no unmet demand for taxis. The wider taxi market does not support the same conclusion, however, with an increasing number of taxi-like vehicles available and in use, without impacting on the total number of taxi trips per day, supporting the view that the demand for taxi-like services is growing, and that this growth is being accommodated by increasing numbers of taxi-like vehicles. It may also be argued that the growth in the taxi market reflects new demands for taxi-like services, not least market growth resulting from new booking technologies.

Recent growth, in the period since 2011, suggests a more fundamental change in market dynamics. Growth in the total taxi market arising over the last 12 to 18 months, and primarily related to the growth in the number of Limos, suggest a much more dynamic market. While growth in the period to 2011 can be charted against the addition of WATs to the taxi fleet, and a limited growth in the Limo and FHV markets, this contrasts to the current doubling of Limo numbers from around 600 in 2011 to over 1,100 at the time of writing. Rapid growth in the Rideshare market should also be considered, illustrated in the previous section but not measured precisely, with new and very new market entrants further extending the total number of vehicles in the taxi market.

Changes in the structure of the taxi market impact across both its users and suppliers. In subsequent sections we set out the relationship between the (changing) nature of the taxi market, its users and key stakeholders. The nature of demand, number of vehicles, and service levels all impact on choices made between suppliers, the decision to use one form of transportation over another, or even the choice to travel at all. The analysis of impacts follows from a more detailed analysis of the nature of the market, demand for travel and choices made. A series of public and stakeholder surveys have been used to derive primary data on user choices and the nature of demand for taxi services, described in subsequent sections.

4. Data and Methodology

In this section of the report we address the approach we have taken in identifying and collecting data. The section describes four surveys undertaken, an intercept survey of members of the public (supported by an on-line version of the same survey); institutional surveys, seeking the views of those making bookings on the half of their clients; stakeholder interviews, including interviews of service providers and their regulators; and secret shopper surveys, identifying experiences for typical journeys.

4.1 Survey Based Analysis

Surveys are widely used in the identification of primary data relating to a specific market. Information collected may be quantitative, reflecting measurable use on market conditions; or qualitative reflecting personal views or perceptions. In our work we undertook a series of surveys collecting both quantitative and qualitative data, as described in section 4.2, to obtain a broad cross section of views, and allow for analysis of demand for services, their use and any issues arising.

4.2 Survey Overview

4.2.1 Public Survey

The research team undertook public surveys, institutional service, stakeholders surveys, and secret shopper surveys. The public surveys took the form of a tablet and on-line survey of quantitative use and qualitative views of services. Responses were categorized using the residential zip-code of the respondent, allowing for the identification of responses by city residents, county residents, and visitors with ZIP Codes outside King County, see figure 5. Responses given without a ZIP Code were also received but excluded from analysis that relate to location specific review, discussed in more detail in subsequent sections.

Figure 5: Public survey response rates by respondent home address

Respondent Home Address	Sample Size
City of Seattle	1396 responses
King County	281 responses
Visitors	153 responses

Source: Public Survey. Based on stated residential zip code

On-line surveys differ from direct intercept in that responses may reflect a different demographic make up compared to a controlled intercept survey. This difference is often allied to the 'self-selection' available to online entries. A bias was noted in the response rates to the online survey, with a higher number of younger respondents. A weighting factor was applied to responses, to more fully represent the demographic make up of the wider population. Demographic characteristics were derived from the 2010 census (US Census Bureau) and applied to responses received.

4.2.2 Institutional Surveys

Institutional surveys were undertaken using an invited online survey, addressed to hotels, restaurants, and medical centers/medical transportation providers; requesting completion by individuals with a role in booking a taxi ride for clients. The institutional surveys sort to identify quantifiable service levels, and quantitative views of services received. A total of 90 responses were received, see figure 6, split between medical centers/medical transportation providers, hotels, restaurants bars and nightclubs

Figure 6: institutional surveys by respondent type, with examples of institutions surveyed

Respondent Type	Sample Size	Examples of institutions surveyed and locations
Medical Centers, Medical Transportation providers	22 Responses	Harborview, UW, Virginia Mason, Overlake, Children's, Seattle Cancer Care Alliance, Hopelink etc.
Hotels	20 Responses	Downtown, South Lake Union, SeaTac, University, First Hill, Kirkland, Issaquah, etc.
Restaurants / Bars / Nightclubs	48 Responses	Downtown, Belltown, Queen Anne, Ballard, Columbia City, Bellevue etc.

Levels of service identified in both public and institutional surveys, as well as views of the quality of service, are used in identifying market responses, detailed in subsequent sections.

4.2.3 Stakeholder Interviews

Stakeholder interviews provide an in-depth review of the taxi market, and in particular issues arising in the supply and use of taxi-like services. Interviews were undertaken using a common structure and addressed to the taxi industry, special interest groups, and commerce and visitor facilities. Interviews were undertaken in person on an individual basis and in small groups (focus groups), see figure 6.

A sample was taken to address a cross section of trade, primary engagement locations (such as SeaTac Airport), and interest groups including the elderly, health care, and commerce associations. The research team undertook 13 separate meetings with individual stakeholders in small groups, set out in detail in the appendices of this document, addressing similar issues in supply and use of services.

Figure 7: stakeholder interview by respondent type, with examples of institutions

Respondent type	Examples of stakeholders surveyed
Taxi Industry	Companies: Yellowcab, Farwest, Orange, STITA Operators: Drivers focus groups, For Hire Industry representatives
Special Interest	Metro Access, Ageing / Disability
Commerce and Visitor	Seattle First, SEATAC, Seattle Hotel Association

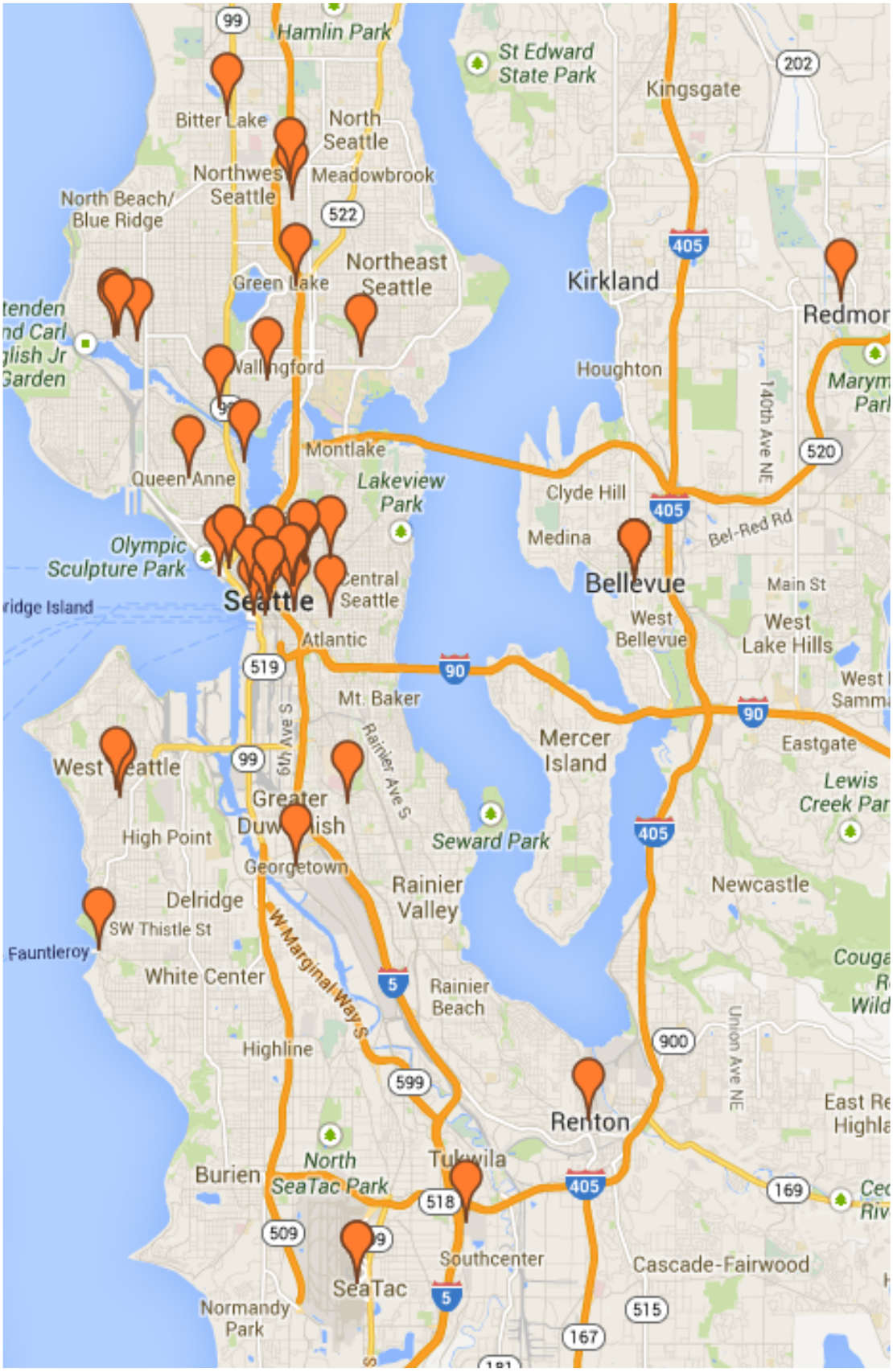
4.2.4 Secret Shopper Surveys

Secret shopper surveys relate to the covert observation of trips made by surveyors. Surveyors are provided with standard analysis metrics covering service level and quality standards, ease of engagement, etc., allowing for the comparison of service levels across journeys, and by competing modes within the taxi market. A total of 55 trips were made, originating across the City of Seattle and King County, see figure 8, representing a cross-section of trips by different modes, locations, and different times a day.

The combination of primary data collected in the four surveys, with trip and operational data from the city and larger taxi companies allows for an analysis of current demand patterns within the taxi market. Dispatch data was provided by the larger taxi associations. Similar data was requested, but not received, from FHV and Limo companies.

In section 5 we draw together primary data collected from our surveys and secondary data, including operational data provided to us, as well as reported vehicle information from the licensing authority.

Figure 8: Locations of secret shopper trip origins



Source: locations from Secret Shopper Surveys

5. Market Demand Analysis

In this section we detail the current demand for taxis and taxi-like vehicles, identifying both the spread of demand and differing demand patterns by identifiable groups. The analysis is derived from patterns of use identified in the public surveys, details of which we have set out above, and from operational data including dispatch records and measured vehicle use. A detailed review of these datasets and application is set out in subsequent sections.

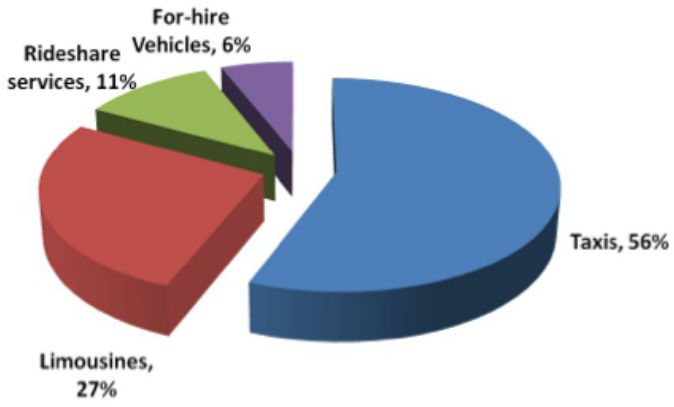
5.1 Demand for Taxi and Taxi-like services

A baseline reflecting current taxi use has been derived from three sources of primary data: reported vehicle operation data from odometer miles and taximeter information, which are collected by the City as part of the current regulatory requirements; dispatch records made available to the research team by larger taxi companies; and reported mode choice of data collected through the public surveys. Operational data were requested, but not provided by FHV or Limo operating companies, nor from App companies including Rideshare. The impact of this shortfall is discussed in more detail below.

It is also noted that responses appeared to suggest some confusion in determining which vehicles were allied to which categories. This was felt to be a particular issue in distinguishing between Taxis and FHVs. The problem arises from similarities in appearance, as well as a similarities in services offered between the two modes. An official distinction lies in the use of a taxi meter, which is required of taxis but not of FHVs and the legal ability to pick up from the street. Street pick-ups also known as hails (and locally as 'bingos'), are prohibited of FHVs within the city, but allowed by both taxis and FHVs within the wider county.

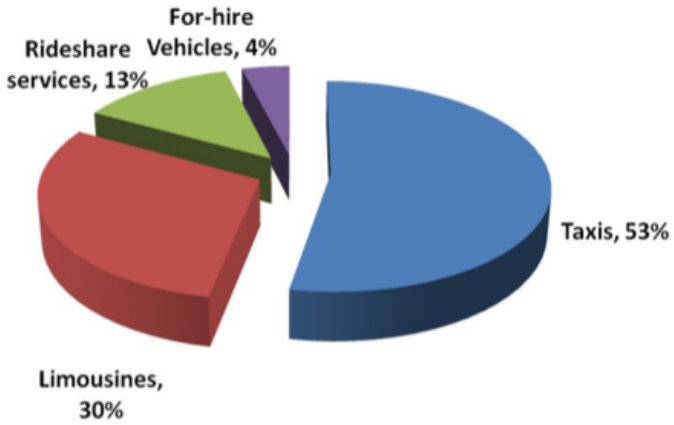
Mode split in the taxi market is set out in figures 9 - 11, which illustrate stated mode choice for last trip made, based on survey responses. A distinction is made between the demand pattern for city residents, county residents, and residents from outside the county. The information provides an overview of the split between differing forms of vehicle within the taxi market based on public responses, and allows for wider analysis of demand patterns. The use of public surveys is common in determining mode split, and may be further corroborated against recorded trip information, such as included in the dispatch records as made available to the research team. Two areas of concern should be noted: the observation that the market is not static - an issue that may result in transient bias, such as a bias toward particular 'new' technologies; and that a confusion appears to exist between taxis and FHVs, which may understate the numbers of FHV trips.

Figure 9: Stated mode split (City Residents)



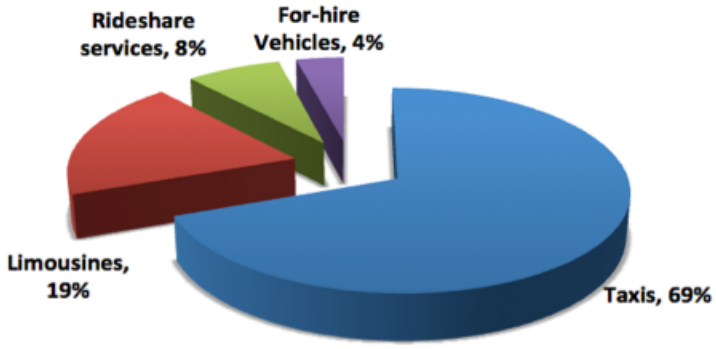
Source: Public Survey

Figure 10: Stated mode split (County Residents)



Source: Public Survey

Figure 11: Stated mode split (Visitors with an address outside Seattle and King County)

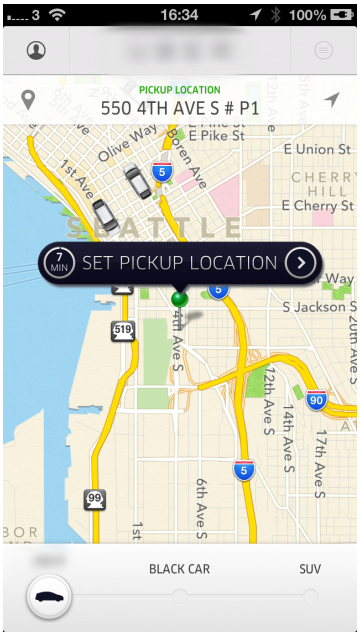


Source: Public Survey

An initial review of the mode split between Taxis, FHVs, Limos and Rideshare highlights that a large proportion of trips remains with taxi services across all three groups, being broadly consistent with the total numbers of vehicles available in each category, illustrated for the City of Seattle in Figure 4, above; but should also be considered in terms of the knowledge, availability and ability to book each mode for each group. Limos and Rideshare services have increased recently, and rapidly, as app based services in which smartphone apps may be used, and often must be used, to book a ride. The popularity of these modes, and the rapid increase in the number of services reflects a symbiotic relationship between the popularity of the app technology and the popularity of the services thus booked. While some Limo services clearly operated prior to the widespread availability of the app, recent and rapid expansion of their use is closely correlated to the acceptance and increasing use of the app itself. Rideshare services, as defined for this analysis, are even more closely allied to the use of apps, and would have been unlikely to have achieved any market share in the absence of the apps that allow for their booking.

Additional confusion may arise in the distinction between Limos and Rideshare in some apps, which present a choice between Limos, including Sports Utility Vehicles (SUVs) registered under state limousine licenses, and Rideshare as a continuum of the same platform. The practice is significant but may lead to confusion as to the service type actually been received, levels of regulation in place, even the extent to which 'fares' are required (as opposed to voluntary), measured or enforced. Figure 12 illustrates the presentation of these three service types in Seattle on one app at the time of writing.

Figure 12: Illustration of booking app offering Limo and Rideshare on the same platform



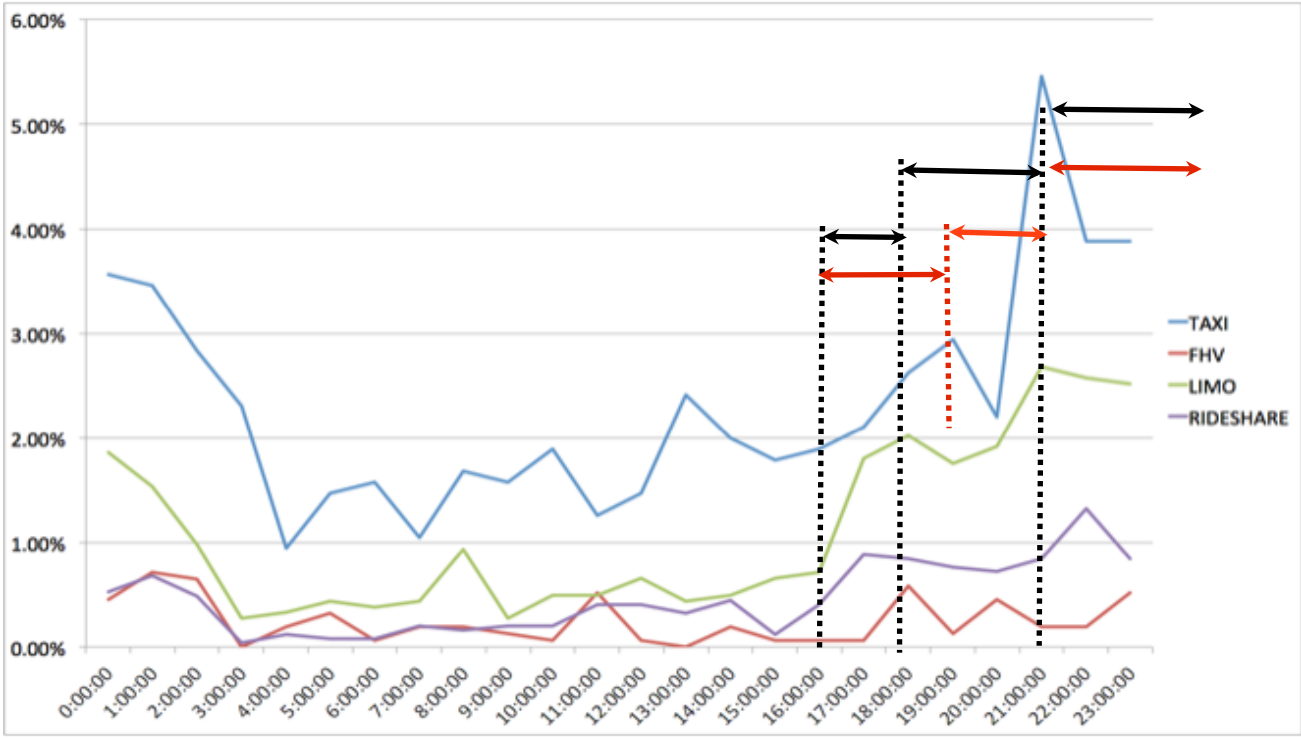
Market share varies by mode between the groups identified above, visitors being more reliant upon taxis than residents of the city or county, but even this group displays a sizable proportion of limo and rideshare trips, see figure 10b. The size of this market share may reflect the popularity and 'portability'

of app-based booking systems. In effect users of an app in one city may feel comfortable with the same app in another. Portability, in this sense, reflects the availability of an app across markets, and may present a significant challenge to the development and take up of a single market taxi app, including locally developed apps proposed by some taxi companies.

5.2 Trip Rates - Seattle

The research team further analyzed trip information by applying the stated market split, derived from the public survey as set out above, to trip data obtained from City collected data on vehicles and dispatch records provided by the taxi companies. This is illustrated in figure 13 which sets out comparative market share by mode across a day. Hourly difference in trip rates are derived from the stated trip times, collected in the public survey and differentiated by mode.

Figure 13: Trip rates by mode (City of Seattle)



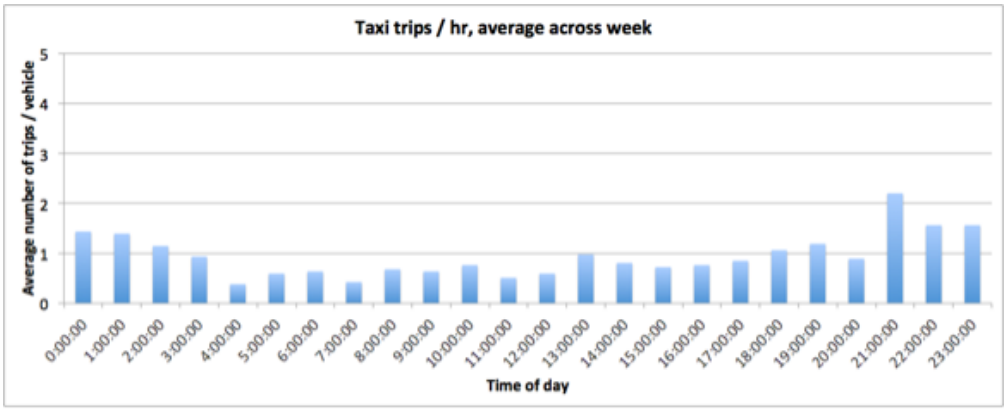
Data Source: Public Survey

The figure illustrates patterns of use over a typical day and is annotated (in black) to illustrate demand patterns for PM Commuting, evening entertainment and night time travel, typically home from a night out. An additional annotation is included, in red, to highlight potential differences in the trip patterns between Taxi users and Limo users. The reported trip rates suggest a longer and shallower curve for taxi uses over a PM commute period, compared to a shorter but steeper curve for limos in the same

period. In short, use of Limos is more distinct in the p.m. commute, than for taxis in the same period, which may indicate a preference for Limos in this period by commuters within younger and more affluent commuters. A relationship between observed vehicle choice in commuter periods and observed preferences by higher income and younger age groups is suggestive of a link between working hours and modal choice, though the increase in demand for both Limos and Taxis indicates that both modes play an active role in providing service to commuters.

Both Taxi and Limo use expand rapidly for evening entertainment, and this is even more distinct on specific nights of the week, as detailed in subsequent sections. Peaks in demand can also be identified in the utilization rates of vehicles for all journey types (hailed, stand and dispatched), illustrated in the case of Seattle taxis in figure 14. The figure demonstrates a correlation between peak demand periods and high levels of taxi utilization, with high levels of utilization visible at the night time peak. Night time peaking is a regularly observed phenomenon in many cities. Figure 14 also demonstrates the very low levels of vehicle utilization in early morning hours and across the middle of the day. Mean utilization across all days of the week is calculated at 1.03 trips per hour based on public survey responses, which is in line with the figure of 1.07 trips per hour which can be calculated from dispatch data. The difference (of 0.04 trips per hour) may be attributed to the 'catch all' nature of the public survey, addressing all engagement methods, as compared to the booked trips set out in the dispatch records. A key observation maybe made that taxi vehicles appeared to be under-utilized across the majority of the daytime. This pattern is observed in a number of cities, with a majority, if not all, large cities experiencing higher nighttime demand than demand during the weekday. This does not illustrate, however the impact of different days of the week, discussed below.

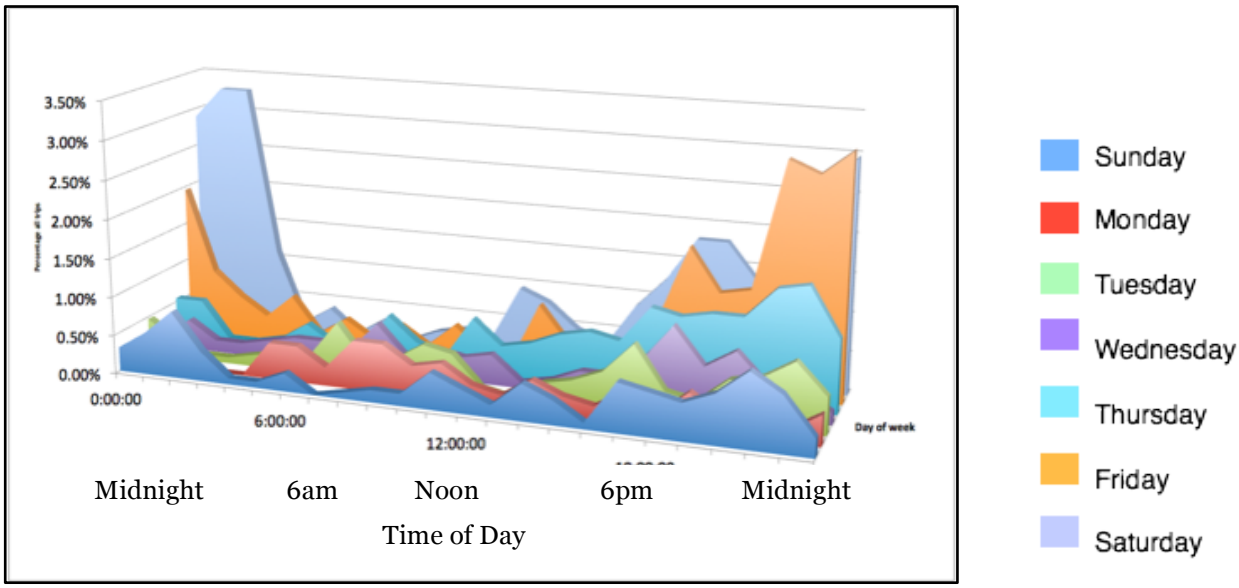
Figure 14: Seattle taxi vehicle utilization, taxi trips per hour average across week



Source: Public Survey and fleet data

A more complex picture emerges when considering the different levels of peak demand by the day of the week. Figure 15 illustrates the significant variation in levels of demand in the City of Seattle on different days. Similar analysis has also been undertaken in regard to King County, discussed in subsequent sections.

Figure 15: Seattle taxi trips by day of week

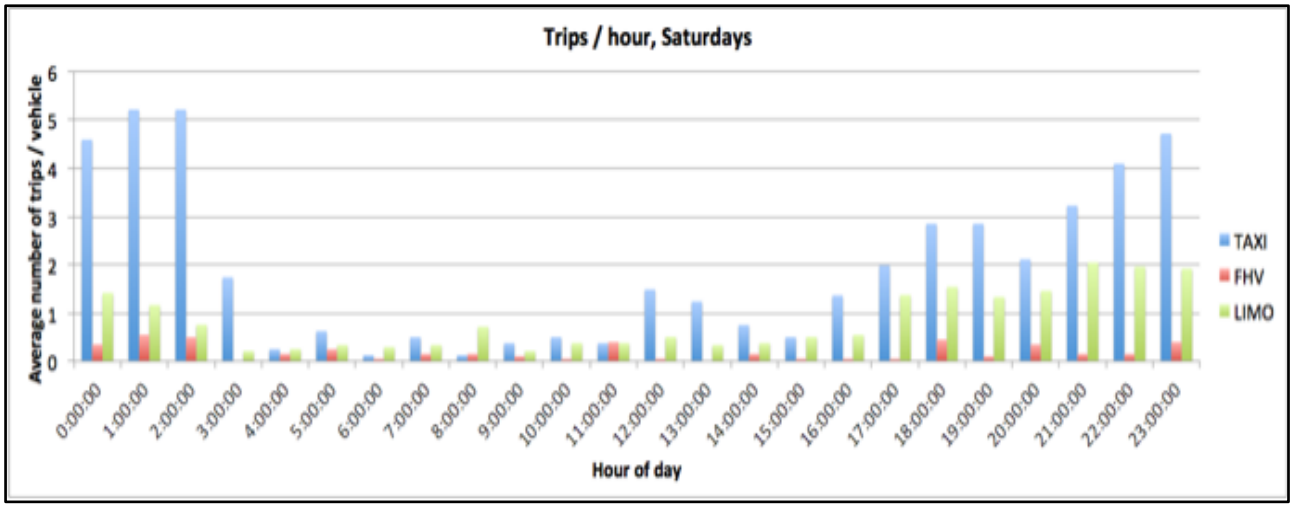


Source: Public Survey

Figure 15 demonstrate significant differences between demand for taxi services across the week. Very high levels of demand can be seen for taxi and taxi-like services for nighttime transportation on Friday on Saturday nights. This peak is common across many cities, and places significant strain upon the provision of transportation at these times. Weekend nighttime peaks in demand create a conflict between service requirement and service provision. The number of licensed vehicles required to meet the peaked demand, figure 15, are likely to create a significant excess in supply at other times.

A more detailed analysis of the impact of weekend nighttime peaks is possible when considering vehicle utilization over the period of one day alone. Figure 16 demonstrates the utilization of Taxis, FHVs and Limos on a Saturday, using reported mode choice from the public survey. The diagram illustrates peak time utilization experienced by passengers traveling home from a Friday night out during the early hours of a Saturday morning on the left hand side of the figure; and peak time utilization experience by outbound passengers traveling to evening activities on a Saturday night, on the right-hand side of the figure.

Figure 16: Seattle taxi vehicle utilization, taxi trips per hour on Saturday



Source: Public Survey and Operator Records

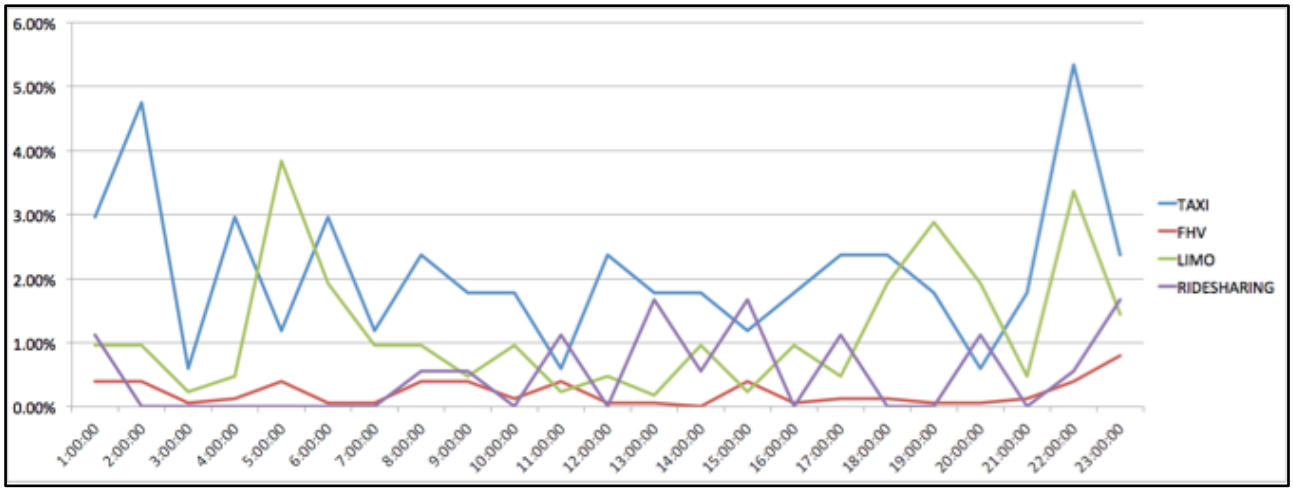
Vehicle utilization rates on a Saturday, figure 15, vary significantly from the same rates averaged across a week, shown in figure 14. Taxi vehicle utilization on a Saturday is more than double its weekly mean with vehicle utilization rates of 4 - 5 trips per taxi per hour at its peak. This represents what may be considered as a maximum level of utilization for the taxi fleet making it unlikely that taxis would be able to accommodate additional trips requested for travel weekend late night, and this is reflected in comments in the public and institutional surveys suggesting delays experienced in travel at these times.

A calculation of trip distance on this basis, where nighttime driving speed is taken as 30mph and where it is assumed that a vehicle returns to the same starting point empty, utilization rates suggest average travel distances no greater than 3.5 miles per passenger. In reality, the taxi fleet is operating at capacity at these times. Some relief may result from a potential for faster driving speeds at night in comparison to those in daytime traffic, but may also result where pressure on taxis is relieved by FHVs. In short, FHVs (and illegal unlicensed vehicles) are already operating in the Seattle nighttime taxi market.

5.3 Trip Rates - King County

Similar analysis is also possible for King County, using primary data related to King County residents responses, though limited by a smaller response rate for this group. Figure 17 illustrates trip rates by mode, and is comparable to similar analysis of city respondents in figure 13. Patterns of peak demand across the day (weekly mean) are similar displaying both nighttime peaks and lower daytime demand. Differences between city and county responses related to the separation of the modes, with a closer balance between the differing modes, and some indication of higher demand for Limos at specific points in the day.

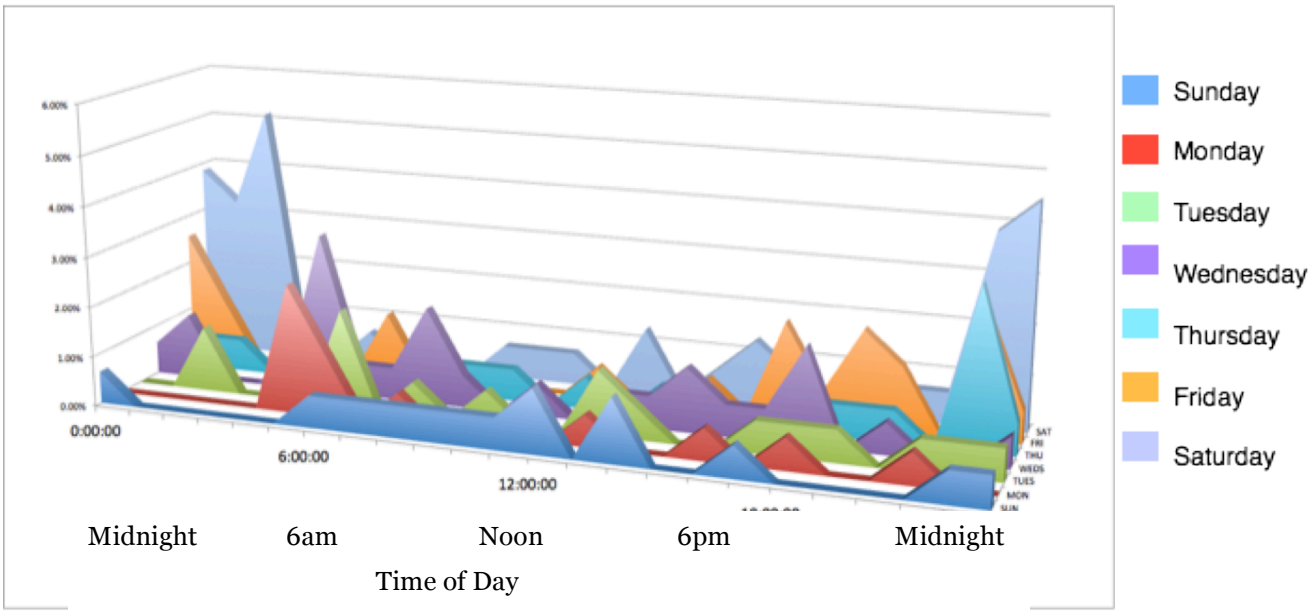
Figure 17: Trip rates by mode (King County)



Source: Public Survey

Similar patterns are also observed in demand by day of week, figure 18, with weekend nighttime peaking a feature in county responses as well as those for the city. Peaking appears more accentuated in the county than for city residents, with additional peaking around morning commuting times on weekdays not seen in the city responses. This may relate to a wider use of taxis in inbound commuting trips, and highlighting a pattern of 'asymmetric demand', that taxis are used on one leg of a journey and not both. The pattern of asynchronous demand is most readily illustrated in the case of travel to a supermarket by transit (without shopping), and return by taxi (with shopping); though similar symmetry may exist in terms of availability of transit (nighttime) or differing values of time in traveling to and from work.

Figure 18: Taxi trips by day of week (King County Residents)



The research team observed both wider fluctuations in demand patterns, but also a wider geographic spread reflecting on the larger area covered in the county, as opposed to the city of Seattle, with significantly lower population densities in northeast and southeast quadrants of the county. Population concentrations in Bellevue, immediately to the east of the city of Seattle, Renton, and the areas in the corridor to SeaTac Airport to the south of the city effectively operate as self-standing taxi market areas.

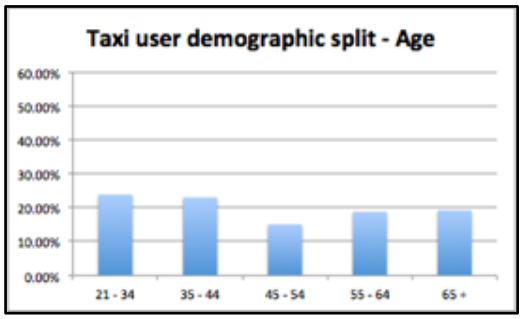
The team sought to identify specific market dynamics in terms of population demographics, set out in the next section, which we apply further in terms of overall market demand and use.

5.4 Demographic factors affecting the taxi market

In this section we consider the demographic profile of users of taxing taxi-like services, both in terms of age and income levels, to identify differences between the choices made by differing socio-economic groups. Demographic profiles were derived from responses to the public survey, and have been split by stated residential zip code, using the same location categories as identified in the sections above.

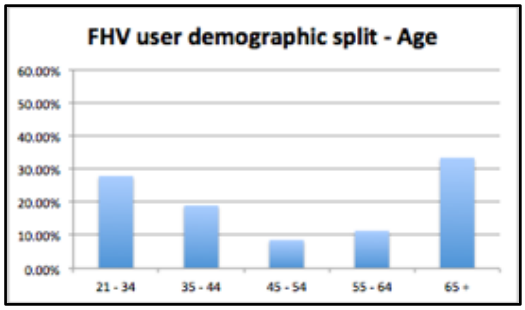
Figure 19 tabulates the profile of City respondents by age. The figures present separate mode demographics, and suggest a distinct difference in the age categories between some modes.

Figure 19: Taxi user age demographic, city respondent



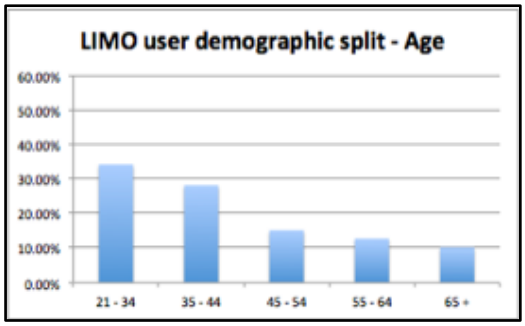
Source: Public Survey

Figure 19a: FHV user age demographic, city respondent



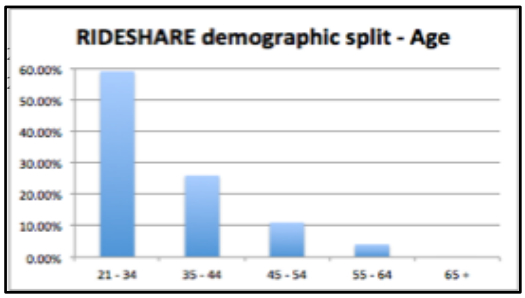
Source: Public Survey

Figure 19b: Limo user age demographic, city respondent



Source: Public Survey

Figure 19c: Rideshare user age demographic, city respondent

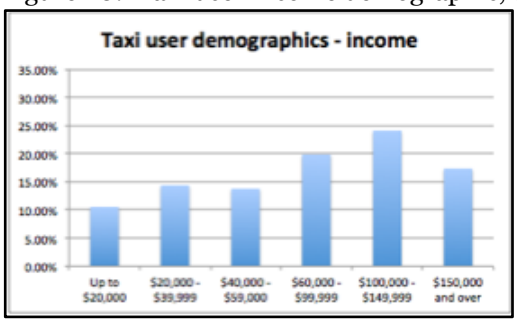


Source: Public Survey

Taxis maintain a relatively consistent spread of users across all age groups, and maybe suggested to provide a service to all on this basis. A further analysis by income is set out in the next section. FHV use is also reasonably spread across age groups, with some reduction in demand in the 45 to 54 and 55 to 64-year-old categories. The more recent market entrants, mainly app based modes, display more distinct differentiation between age groups. Both Limo user and rideshare user groups are younger, with a significant bias to young users in the rideshare market. Review on the basis of age alone, might suggest that the taxi mode remains the most widely used and available mode in the taxi market. Newer modes may also reflect the nature of the booking technology, apps being most commonly used in younger age groups, and societal differences in acceptance, in the differing age ranges, particularly in the case of the use of rideshare.

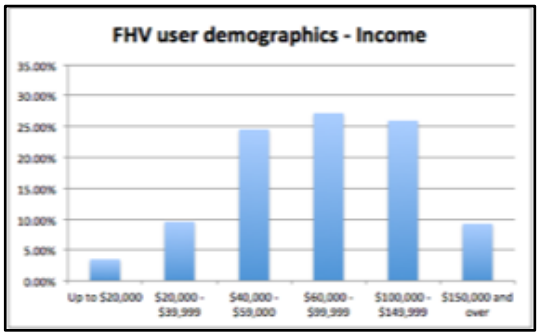
Figure 20 extends the analysis to include stated income levels, derived from city resident responses in the public survey, and is of particular significance in relation to lower income level responses.

Figure 20: Taxi user income demographic, city respondent



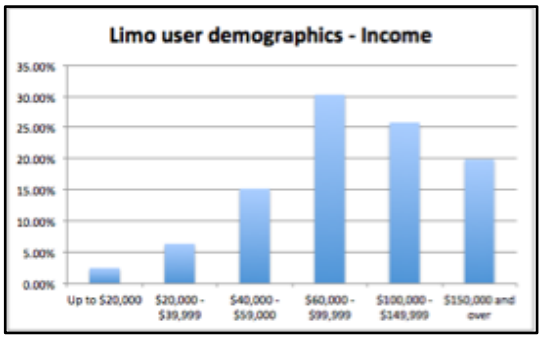
Source: Public Survey

Figure 20a: FHV user income demographic, city respondent



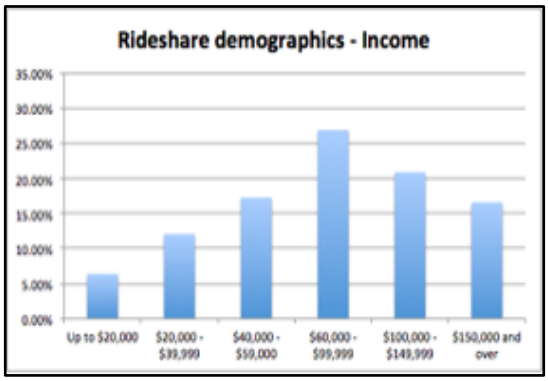
Source: Public Survey

Figure 20b: Limo user income demographic, city respondent



Source: Public Survey

Figure 20c: Rideshare user income demographic, city respondent



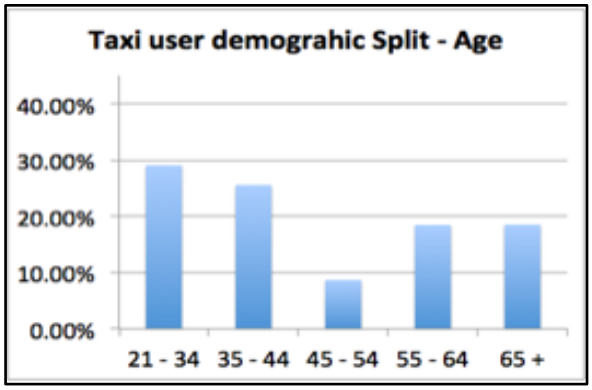
Source: Public Survey

The four modes: Taxi, FHV, Limo, and Rideshare demonstrate differing patterns of demand by income group. Of the modes, the taxi remains the most widely used at all income levels and has the highest percentage of all use for income levels up to $20,000 and between $20,00 - $39,999. The other modes, notably limo and rideshare, are reported with higher percentages for higher income levels.

The combination of income and age demographics suggests that the modes can differ significantly in terms of the users most likely to choose that mode. The taxicab is the one mode that provides service across all groups, all incomes and all ages.

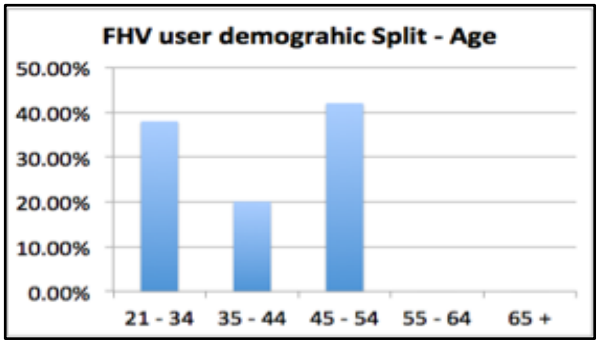
Limos and Rideshare, in contrast remain more concentrated to younger and more affluent users. A role exists, and is currently catered for by taxis, in ensuring services to lower income and wider age groups. A similar, but not identical, picture arises in terms of county respondents compared to city residents, see figure 21, taxis appearing to represent a broader range of age groups than other modes, with a continuing pattern of Limo and Rideshare use to lower age groups.

Figure 21: Taxi user age demographic, county respondent



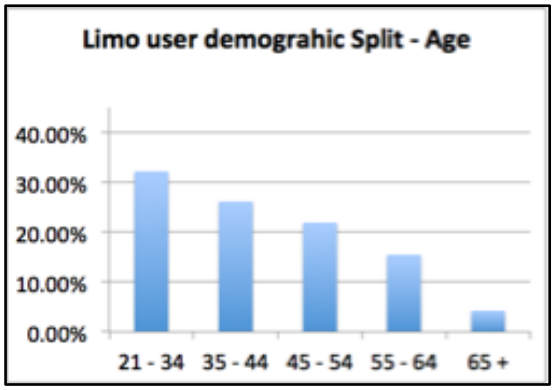
Source: Public Survey

Figure 21a: FHV user age demographic, county respondent



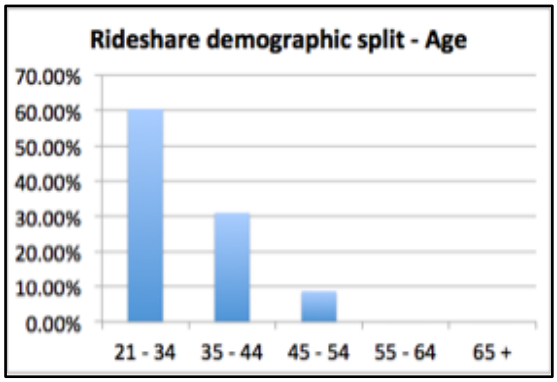
Source: Public Survey

Figure 21b: Limo user age demographic, county respondent



Source: Public Survey

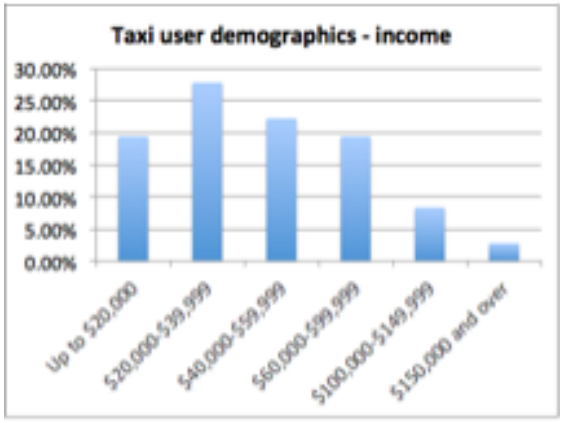
Figure 21c: Rideshare user age demographic, county respondent



Source: Public Survey

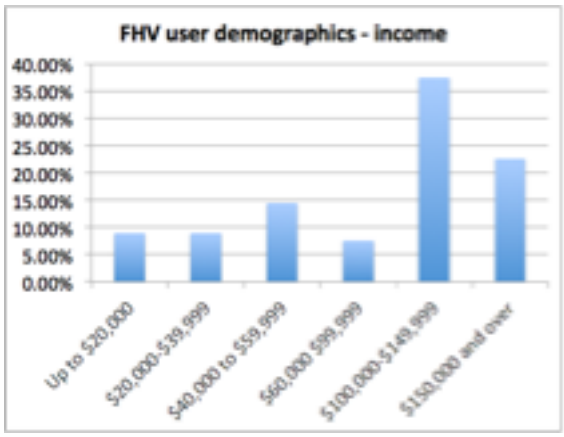
Income demographics are also repeated between city and county, see figure 22, though a more distinct differentiation in income distribution is noted in terms of taxi use, which caters for a lower income distribution, and a peaked Limo distribution amongst higher income respondents.

Figure 22: Taxi user income demographic, county respondent



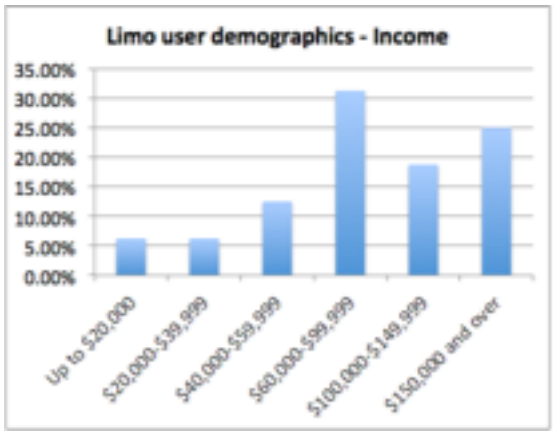
Source: Public Survey

Figure 22a: FHV user income demographic, county respondent



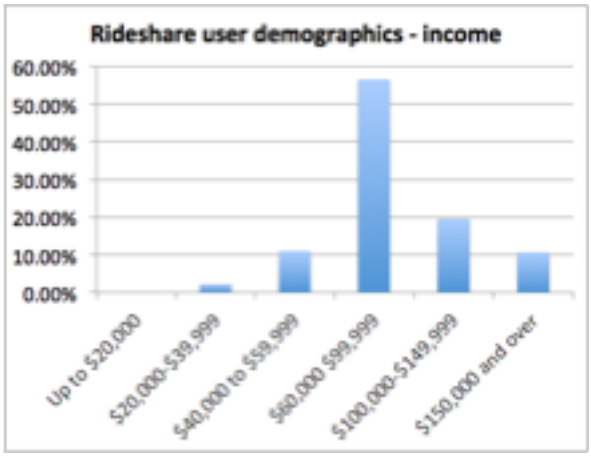
Source: Public Survey

Figure 22b: Limo user income demographic, county respondent



Source: Public Survey

Figure 22c: Rideshare user income demographic, county respondent



Source: Public Survey

Both city and county responses reflect changes in the market resulting from, and contributing to, the development of new services. Taxis continue to serve the largest share of the market, but have been, and will continue to be, impacted by new service types. Friday and Saturday nights show the highest level of demand in both locations, and this has resulted in a strain in the ability of taxis to serve all trips demanded of them in the case of the city at weekend nighttime.

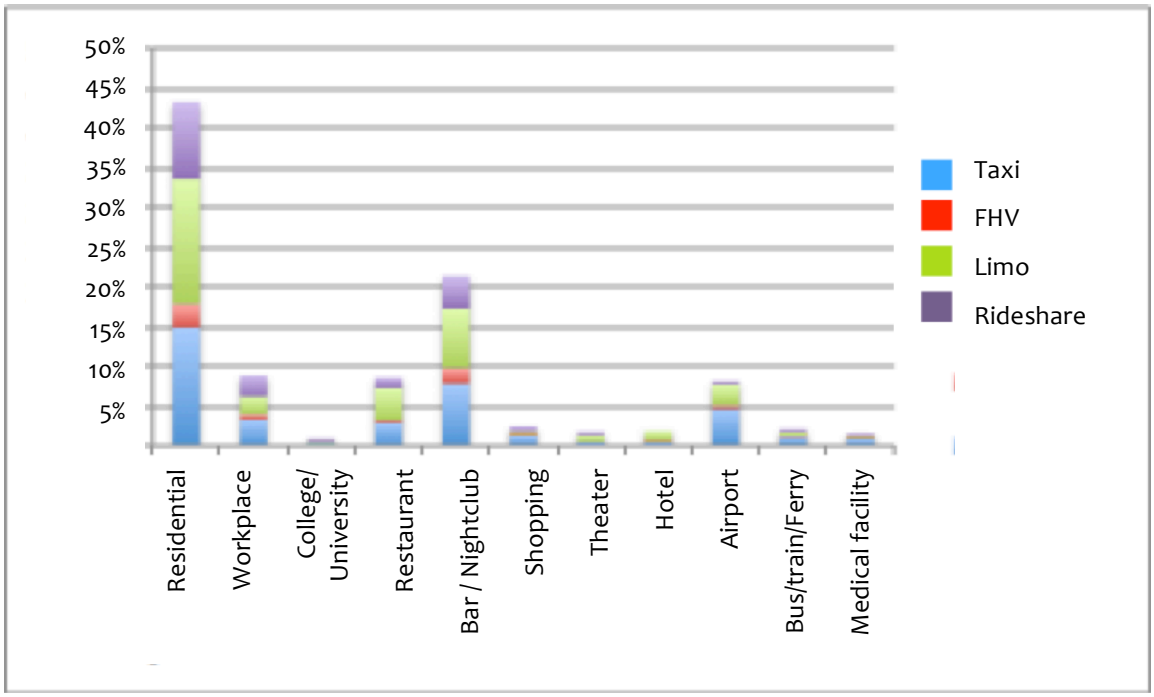
5.5 Categories of use

The research team undertook further analysis identifying trips to specific categories. Reported last trip data, collected in the public surveys, provides a base for the identification of user categories. These reflect a snapshot of the industry, which can be differentiated further between city, county and visitor respondents, and allow for prediction and speculation of future market development. Categorization relates to trip production, specifically to one of 12 locations at which a trip commenced. Trip origins do not necessarily reflect the purpose of a trip, but are readily measured in surveys and can be further related to demographic and trip pattern data to provide a detailed understanding of the taxi market. The public survey identified the following primary locations, and allowed for additional categories to be entered:

Residential address;
Workplace;
College/University;
Restaurant;
Bar/nightclub;
Shopping;
Theater;
Hotel;
Airport;
Bus/Train/Ferry; or
Medical Facility.

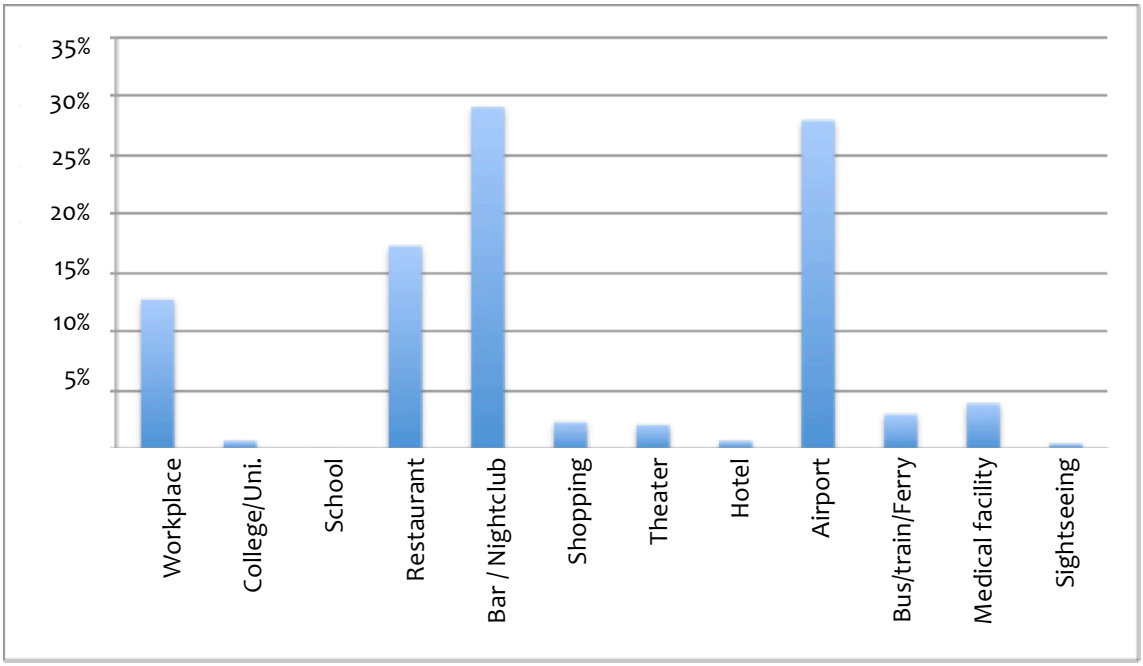
The identification of trip categories by origin or Origin / Destination (O/D) pair is set out in figure 23, which illustrates origins alone; and Figure 24 which illustrates residential trip OD pairings. It is noted that a fully delineated double constraint OD analysis is not undertaken due to the exponential increase in OD pair combinations.

Figure 23: Location of trip origin - city residents



Source: Public Survey

Figure 24 Trip destinations, residential trip origins



Source: Public Survey

The identification of trip categories allows for a review of specific time periods discussed in more detail in section 7, below.

6. Service Levels

In addition to the identification of use and patterns of demand, the research team also considered the impacts of service levels on the taxi market. A single approach was adopted across all public and institutional surveys in identifying market expectations, and perceptions of service quality.

6.1 Public Survey

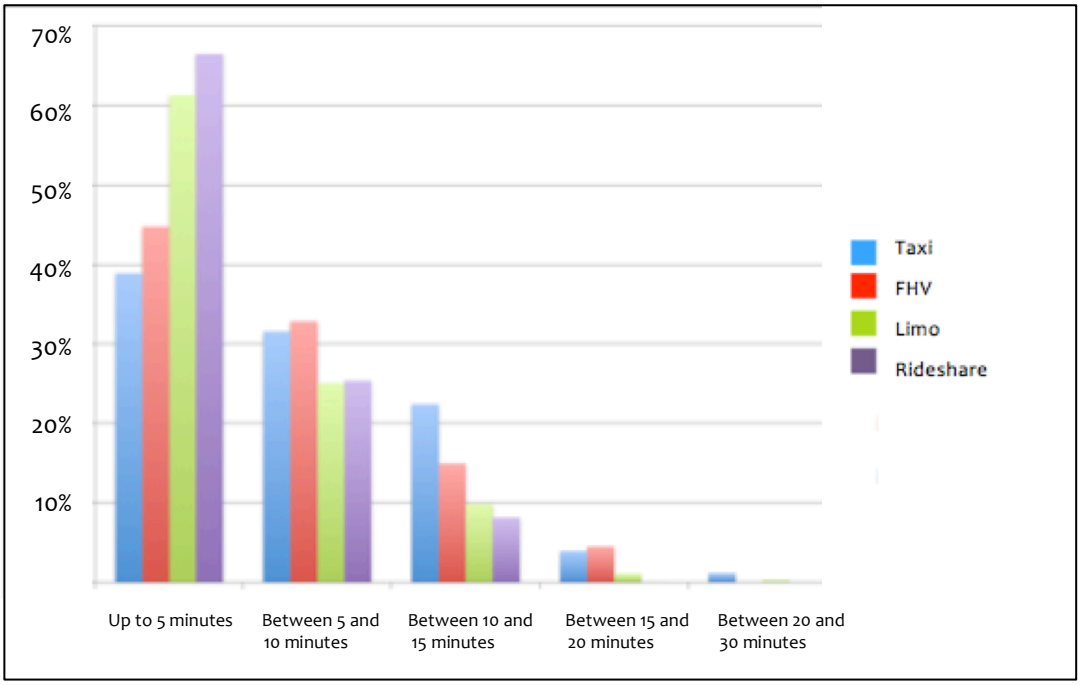
Response times are generally used as an indicator of the ability of a market to satisfy demand. Longer response times indicate a difficulty in the provision of appropriate services. A number of common indicators are applied across cities, which include Toronto and Atlanta, in which a definition of service response times – the delay between booking and being picked up, is used as a general indicator of service levels; typically based on reported expectations. Some caution is appropriate, however, in that the measured rate is, at best, an average across services that may differ significantly by location within a city, and by time of day. It may also be inappropriate to adopt standards applied in one city to any other, as the circumstances of provision, which include geography and infrastructure, will differ.

The study team identified a desirable service level as a base indicator of expectations through public surveys, with a further question addressing the same issue in institutional surveys. We also differentiate between the expectations of service levels in relation to taxis and in relation to other taxi-like modes. Figure 25 illustrates stated expectations at point of peak demand. The figure illustrates variations in expectations of response times, and reveals higher expectations of Limos and Rideshare than of taxis. 65% of respondents indicated a 5-minute or quicker service level expectation for Limos compared to 38% for taxis, see figure 24. The survey also identified the response times users felt they had received, set out in figure 25. Comparison of the service levels felt desirable as appropriate or maximum response times and those felt to be delivered reveal a significant difference most notably in taxis. A further issue exists on defining lower threshold response times. The definition of a lower threshold reflects the need to account for accessing a pick up safely, without placing unsafe pressure on a driver to behave dangerously or break speed limits to achieve an unrealistic response time requirement. Thresholds may be adjusted to reflect distances and are likely to be more generous in distant communities. Response time requirements could thus be identified as a range, eg: where city center pick up by taxi would be normally delivered within 10 minutes, out of town trips with 15 minutes.

Figure 26 illustrates the length of time reported as actually waiting from the public survey, while Figure 27 sets out measured mean response rates on the basis of meter data across a number of Seattle locations, highlighting the differences in achieving low response rates by location; effectively desire,

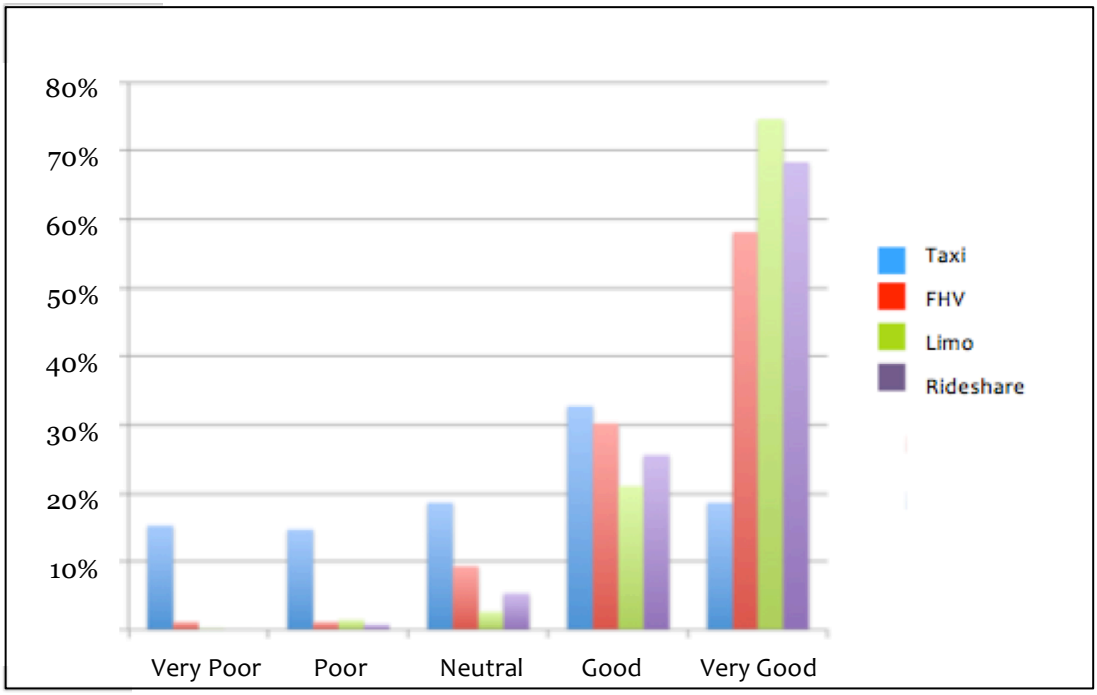
perception and measurement. The same differentials may be useful in informing service criteria on a more detailed level than city or county global averages.

Figure 25: Stated response time expectations, Saturday night peak



Source: Public Survey

Figure 26: Stated response time experiences



Source: Public Survey

Figure 27: Table of measured response times by location

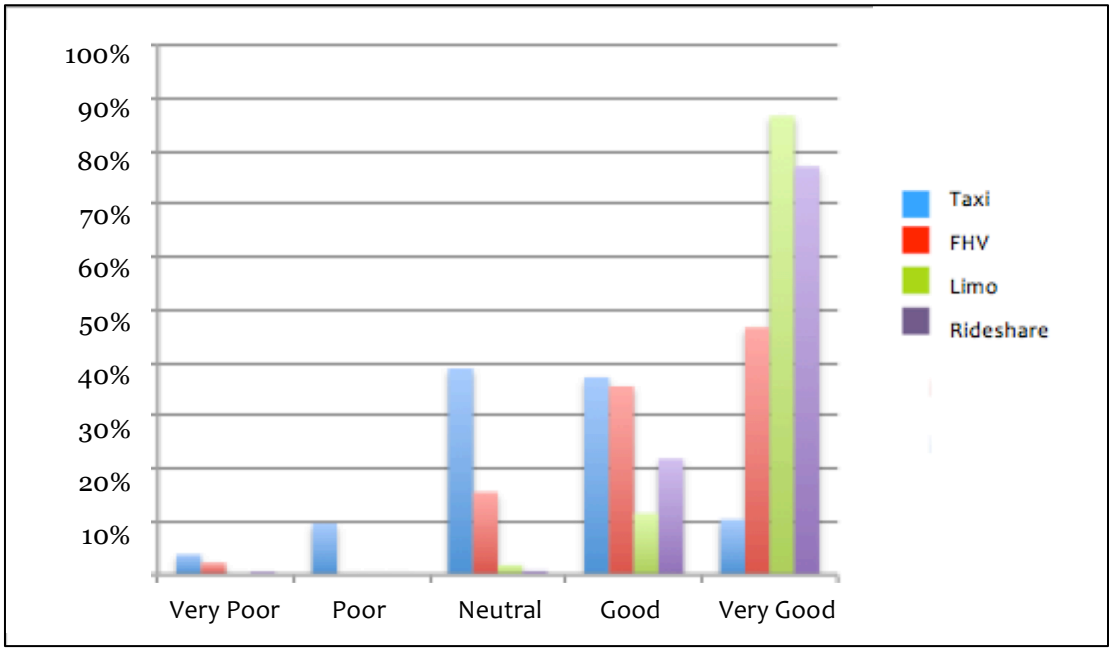
Location	Response time (2012 year average) in minutes
City of Seattle Mean	11.88
Seattle waterfront	8.83
Upper downtown Seattle	7.92
First Hill medical facilities	9.17
Pioneer Square	8.75
Queen Anne	10.92
Edgewater/ Pier	10.08
Lake Union	9.75
Broadway	10.08
Madison Park	12.25
Yesler Hill	10.42
Magnolia	13.33
Ballard	15.83
Fremont/Wallingford	14.67
University	15.08
Greenwood	16.00
Northgate/Lake City	15.33
West Seattle north	15.75
SODO	11.33
Georgetown	15.75
Ranier Valley north	14.58
West Seattle – central	16.50
Ranier Valley central	17.00
White Center / Burien	16.50

Source: City of Seattle

Public surveys also addressed a range of further service quality indicators. Figure 28 sets out public responses to the general quality of services and provide direct comparison between modes. Taxi

services performed poorly in comparison to immediate alternatives with over 85% of responses indicating Limo services to be very good, compared to 10% feeling taxi services fell into this category.

Figure 28: Overall quality of service by mode

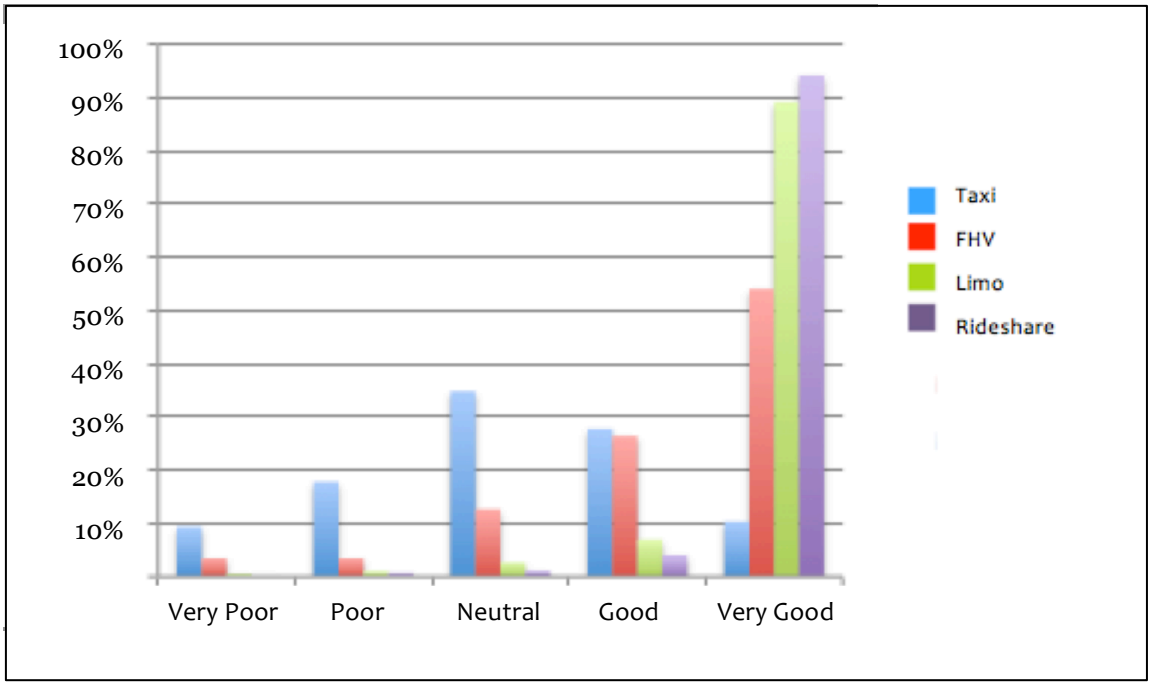


Source: Public Survey

Ease of payment

In this question we sought to identify views on ease of payment. Much of the current discussion regarding ease of payment concentrates on the use of credit cards, which may not always be accepted in taxis or FHVs, but this may not be the only issue related to ease of payment, as app based services are typically based entirely on credit card use, a factor that may discourage some users. Figure 29 sets out the responses by mode when asked about ease of payment.

Figure 29: Ease of payment by mode



Source: Public Survey

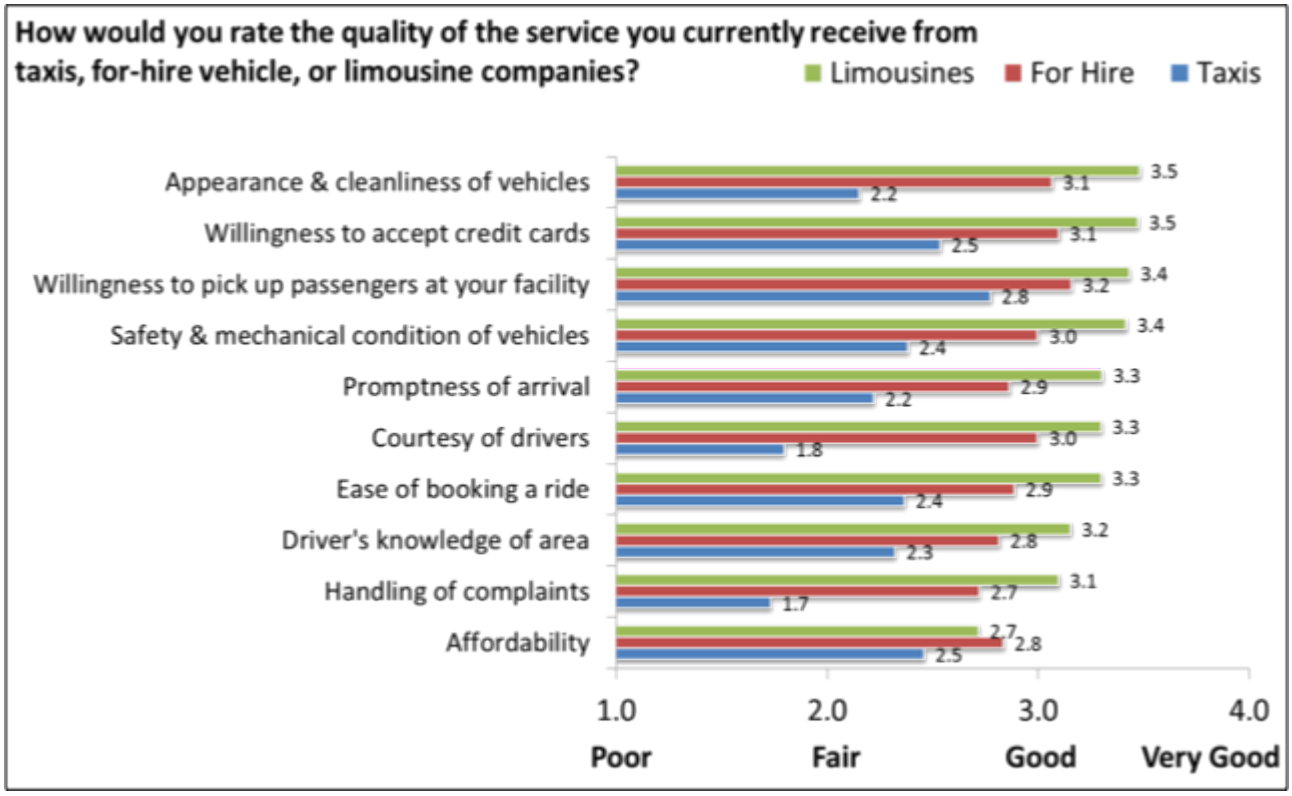
As in previous questions a sharp difference emerges between views of ease of payment within the taxi trade and ease of payment for other modes.

6.2 Institutional Surveys

A similar approach was adopted in the institutional surveys. Institutional surveys are so called because they represent frequent taxi users in the sense that these individuals who call taxis for their guests and clients have frequent interaction with a number of taxi companies, their vehicles and drivers each day. These surveys were completed by hotel doormen and concierges; restaurant owners; and medical personnel who regularly organize taxi trips for their patients. Therefore it is felt that they are in a good position to evaluate the quality of services being offered by the taxi industry in their community.

It should be noted however that hotel doormen, restaurant personnel, and medical facility personnel are part of establishments that traditionally have high customer standards and expect their guests, clients, and customers to be treated with the upmost care and respect. As can be seen from their collective evaluations below, see figure 30, their overall evaluation of current Seattle taxi service is quite low but significantly higher for FHV and higher still for Limo services in their community.

Figure 30: Institutional responses - service quality



Source: Institutional Surveys

The only service attribute that taxis received a rating approaching good service is willingness to pick up passengers, a key attribute in which the taxi has a natural advantage. On the other hand, attributes such as promptness of arrival, vehicle appearance, and safety were rated only as "fair". Of key importance were the values of driver courtesy and handling of complaints which were rated somewhere between poor and fair. For an industry catering to the general public, these responses signify an inability of the service provider to attract and maintain their institutional market.

At the other end of the service continuum was that of limo services. On all attributes except affordability, they were ranked as good to very good. Even with respect to affordability, they were ranked slightly higher than taxis. Such a significant difference in the perception of limo from that of taxis is reflected in the rapid rise of the number of state authorized limousines within the Seattle and King County.

FHVs were also ranked significantly higher than taxis on all attributes except that of affordability but even here it was perceived to be slightly more affordable than taxis. For the most part, these services are rated as being "good". Most striking was the gap between FHV drivers and taxi drivers with respect to courtesy of drivers. Clearly FHV drivers are perceived as being significantly better than taxi drivers. On the other hand, the most encouraging information contained in these evaluations for the Seattle, King County taxi industry is that its low marks are all things they can fix without significant financial input. Just cleaning the vehicles inside and out would improve their overall image. Driver courtesy can

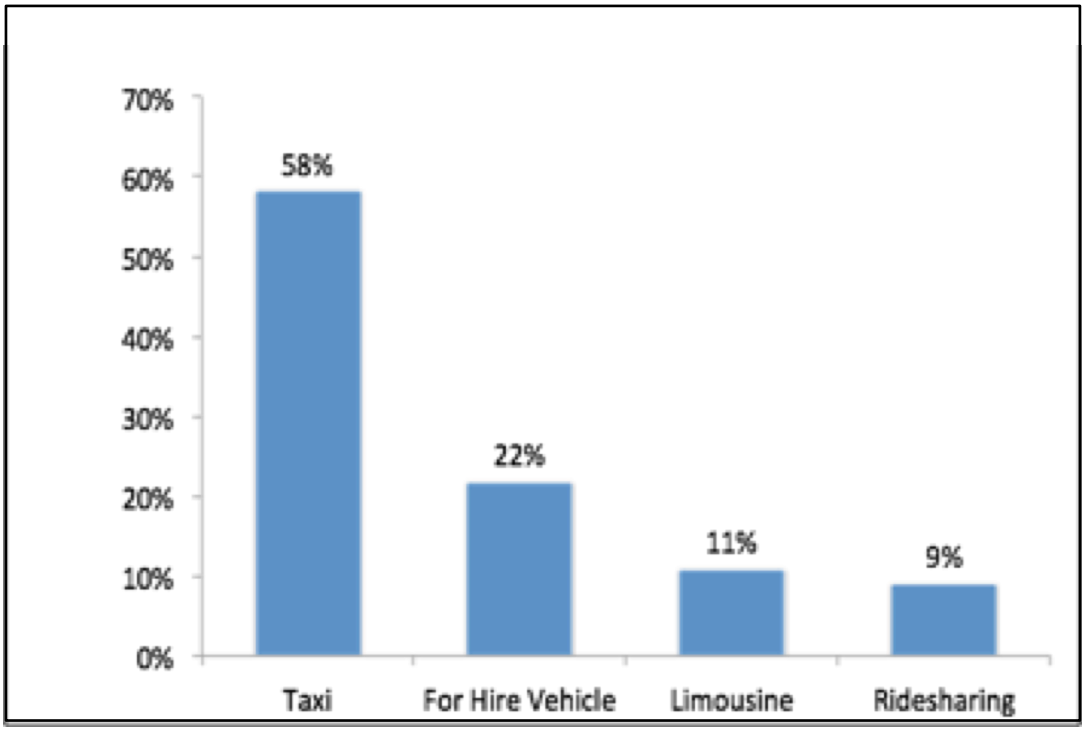
be achieved through training and the weeding out of offending drivers. On-time performance can be measured and improved with feedback to drivers and again training and removal of offending drivers. Dispatch center attitudes can also be improved with training.

6.3 Secret shopper Surveys

Secret shopper reports are a way for a product or service provider to gain an appreciation of how the customer views the shopping or user experience of the product or service that is being offered. In Seattle and King County this study surveyed taxi and taxi-type providers 55 times with formal secret shopper experiences and reports. A summary of these reports can be found in the appendices to this report.

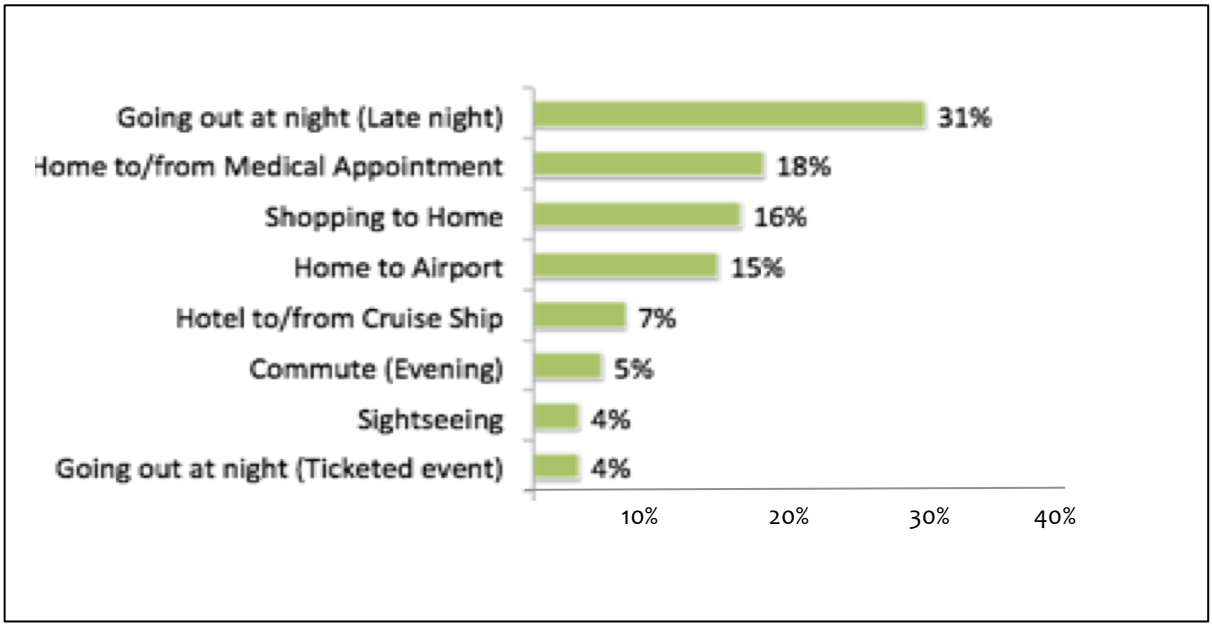
Figure 31 sets out the types of services tested. Taxis received the greatest number of shopper reports, followed by FHV, Limos, and ridesharing in that order. In addition, as shown in figure 32, a variety of trip types were tested and reported upon.

Figure 31: Secret Shopper modes tested



Source: Secret Shopper survey

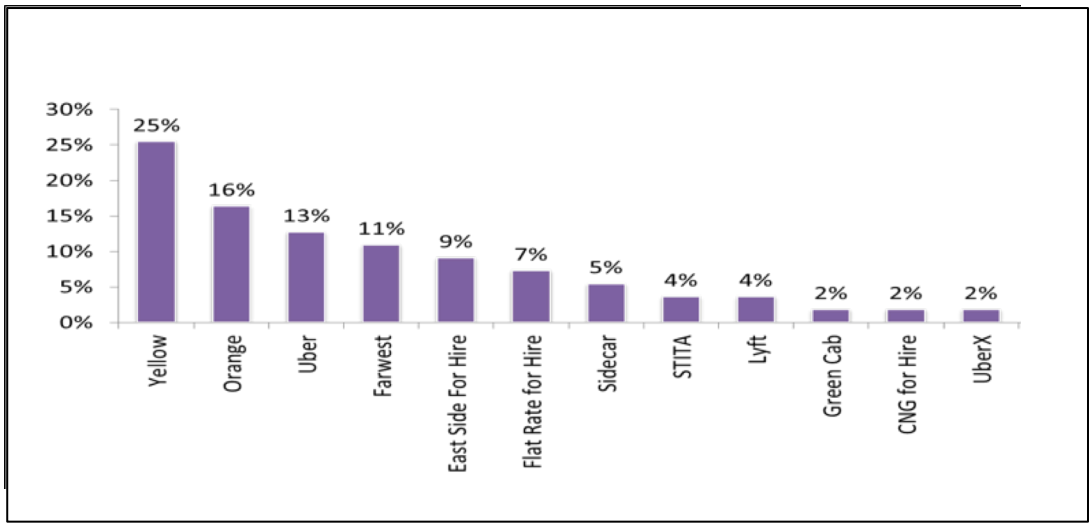
Figure 32: Secret Shopper, types of trips tested



Source: Secret Shopper survey

The secret shoppers tested the services of most types of the taxi and taxi-type trip providers in Seattle and King County. These tests were performed on traditional large taxi companies, smaller, owner-operator type taxi operations, FHV operators, and several app companies offering taxi-type trips. A complete listing of these companies is found in figure 33.

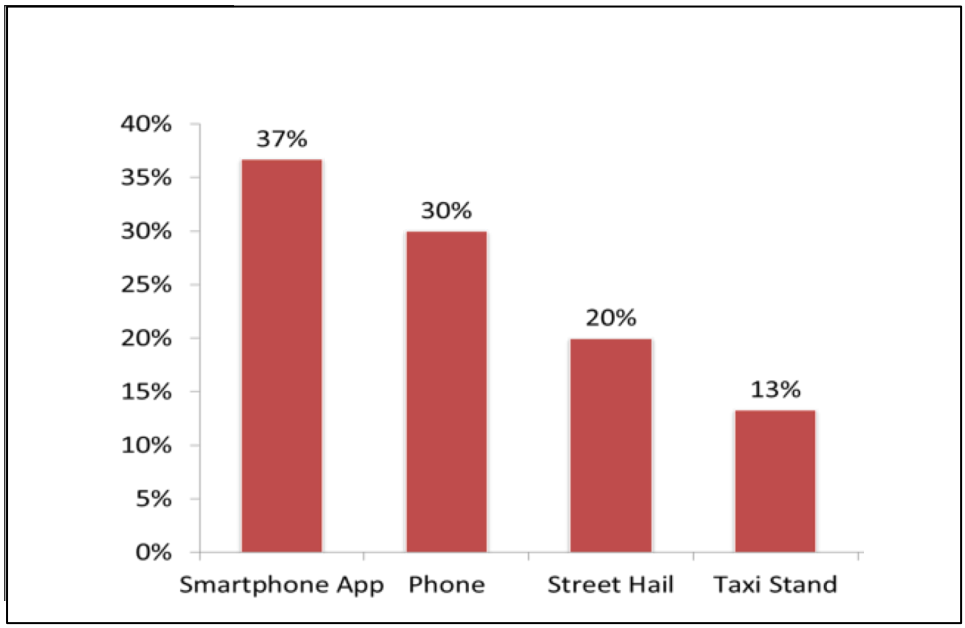
Figure 33: Secret Shopper, suppliers tested



Source: Secret Shopper Survey

Slightly more of the secret shopper trips were prearranged, 56%. And these shopper tests utilized a variety of ways to call for a taxi - just as any user might. The different methods for calling taxi or taxi type services are set out in figure 34.

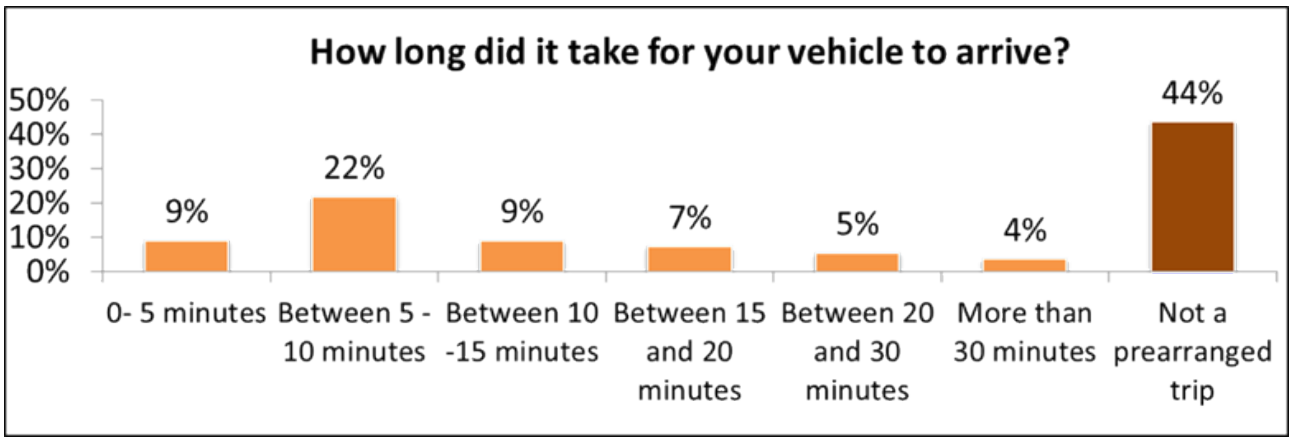
Figure 34: Secret Shopper booking method



Source: Secret Shopper Survey

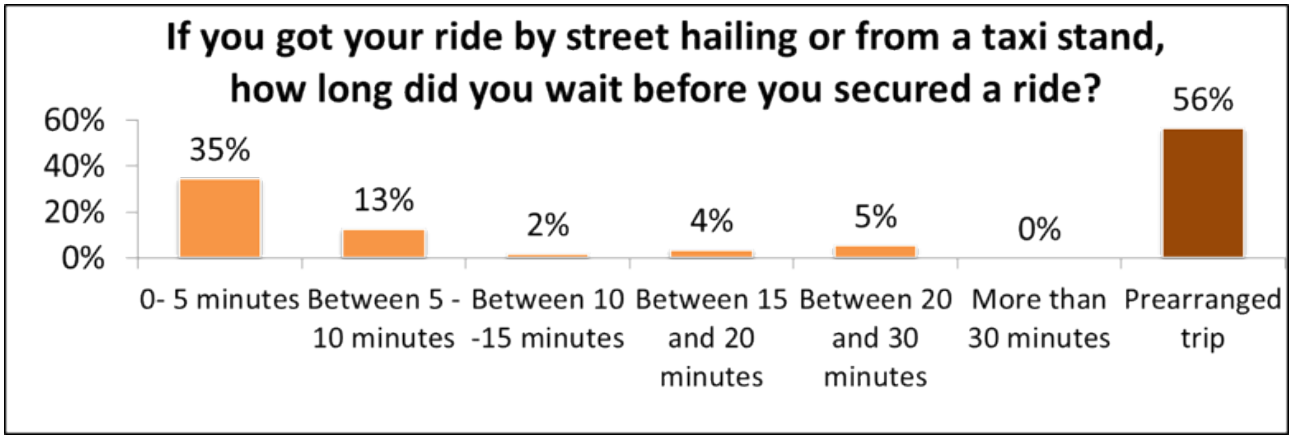
Waiting time for taxi users is always important. Secret shoppers were asked to track the time it took waiting for their on-demand taxi to arrive. For those trips that were prearranged, shoppers requested that they be picked up as soon as possible. As shown below, there was a considerable range in the waiting times experienced by these secret shoppers but not a wait time that would be considered out of the ordinary for normal called taxi service. It would appear that if a taxi or taxi type operator accepts a trip, the wait is within expected and accepted levels derived from the survey, see figure 35.

Figure 35: Secret Shopper, reported delay



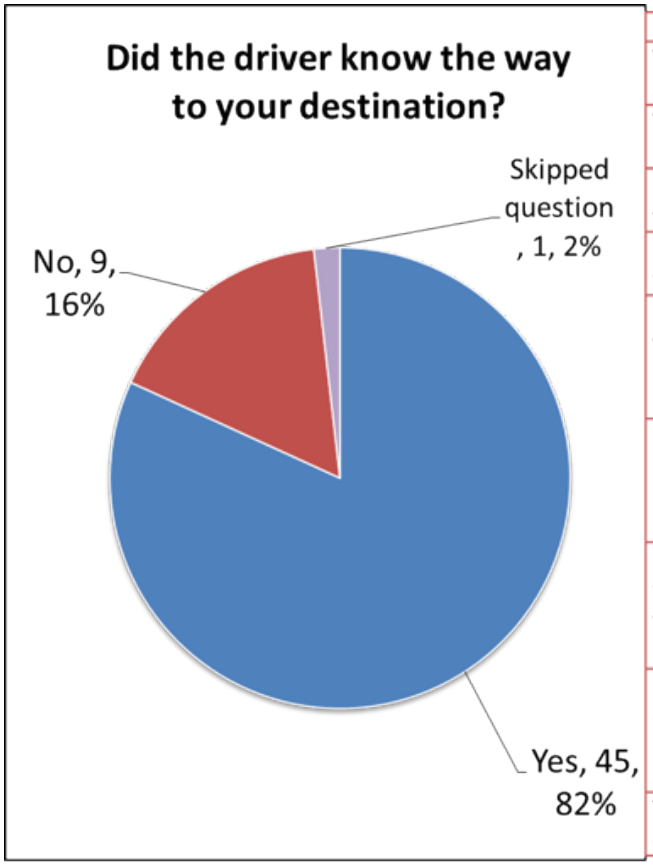
Hailing a taxi on the streets of Seattle proved to be a challenge for our secret shoppers. First there is the obvious confusion as to what vehicle one can hail. King County Yellow cabs for example look exactly like Seattle Yellow cabs but cannot stop to pick up on demand within the city. FHVs, which look like taxis also cannot pick up on demand within the city limits. However, the secret shoppers, tasked with taking taxi and taxi-type trips, experienced little difficulty in acquiring service when attempting to hail a cab as the following chart demonstrates.

Figure 36: Secret Shopper Hailing Times



Of particular concern to Seattle and King County regulators was whether taxi and taxi-type trip drivers knew where they were going. Or, do a significant number of drivers depend upon the user to tell them how to get to their desired destination? As the chart below indicates, most drivers (82%) generally know where they are going but clearly a substantial number of drivers require assistance from the user as shown by the sample of shopper comments shown in the accompanying chart.

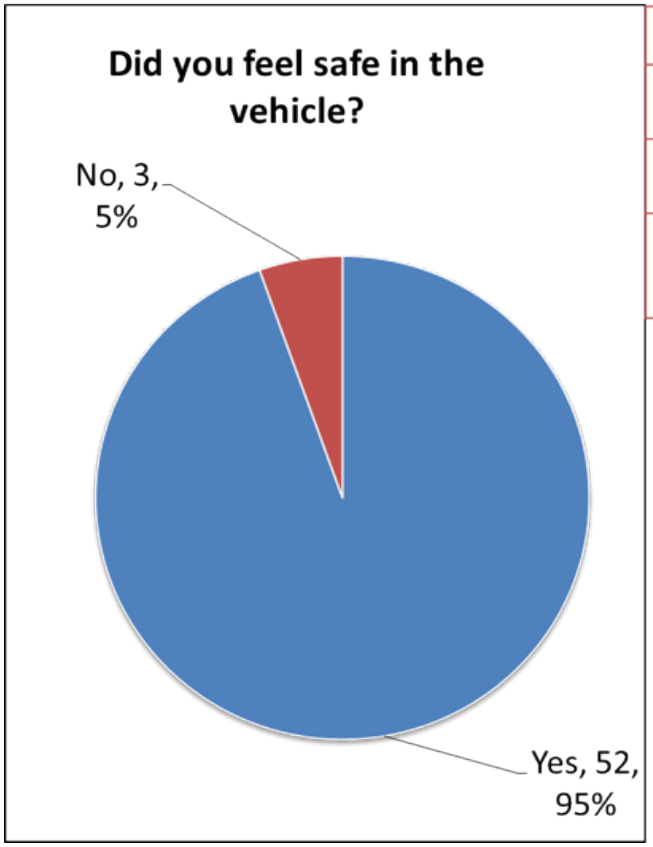
Figure 37



If no, did the driver ask you for directions?
The driver asked me to look up directions for him on my smartphone.
The driver took me to 24th Ave NE rather than NW as requested.
He asked me for directions, but also said that he could figure it out if I didn't know.
I gave him the address and he asked me what the best route was to get there.
I told him I was going to the Kirkland Waterfront. He asked for an exact address. I had to look it up on my smartphone. He waited while I looked it up. He also wanted me to tell him which bridge to take (I-90 or 520).
I told him I was going to the Tripledoor, downtown Seattle. He asked what the address was; I had to look it up on my phone. When we arrived, he passed the destination and I had to tell him to stop.
I told the driver I was going to Fred Hutchinson. He asked what the address was. I gave it to him and he still passed the destination. He had to turn around and drop me off at a nearby location instead of the original location.
I gave her the name of the location (Blue Martini), but she did not know where it was and asked me for the physical address. She then input the address into her GPS and was able to find the location.
The driver didn't know the location and asked me for directions.

One of the primary objectives of any taxi regulatory authority is the safety of passengers riding in regulated vehicles. It should be unusual for a passenger to feel that their safety is being compromised in a public vehicle. As shown by the graph and comments from the secret shoppers, there are a small but dangerous number of taxi and taxi-type drivers that compromise the safety of their passengers and others on the streets.

Figure 38



If not, please explain
The cab driver accelerated really fast and took corners really fast. I was a little uneasy during this ride.
This driver drove really fast; he hit the accelerator really hard at green lights and took turns really fast.
I was a little uncomfortable because the driver was really unhappy that I was a short fare (wasn't going to the airport like the other people at Pier 66).

As previously stated Secret Shopper reports are useful for gathering unbiased opinions as to what customers of local taxi and taxi-type trips experience in a normal day when using these services. These reports are written by trained professional personnel who often do these reports on a full or regular part time basis. While they may have some preconceived attitudes, they are able to put them aside and provide an objective and quantifiable analysis of the quality of service(s) they and others are receiving. A note of caution is added: these reports are not typically generalizable to the entire population unless the majority of the Secret Shopper reports evidences a clear and obvious pattern. However, the summarized experiences of services received are often quite revealing to taxi regulators and company owners alike. A complete summary of these secret shopper report comments can be viewed in the appendices of this document.

6.4 Comparative Service Standards

Having identified a very mixed range of service levels in the Seattle market, the research team sought to identify how these may compare with other locations.

Local regulatory authorities for the purpose of setting minimum levels of expected service establish taxicab service standards. These standards are usually expressed in the maximum time to service an on-demand call; vehicle age; condition and inspection; driver qualifications, knowledge, dress, appearance,

and language skills; hours of service, and compliance with specific local ordinances such as compliance with hail laws. Some local taxi ordinances attempt to regulate driver income through a capping of the lease fees drivers are required to pay a taxi company or the owner of a taxi permit.

As one might expect, there are difficulties of comparing one city's taxi service standards with those of another city. The geographic differences of cities for example require some attention when setting service standards. Standards like "service must be provided within 10 minutes within the core urban area 90% of the time" can and are typically found in many cities that do specify service time standards. However, when going beyond the downtown area, travel times, natural barriers such as rivers and bridges, and geographical area of the city need to be considered. Seattle, for example, has a very narrow geographic area bounded by water and terrain with frequent traffic jams. Service time for areas outside the city center need to take this into consideration and an example of a standard may read: "service must be provided within 25 minutes outside the city center but within King County 90% of the time."

There are no documented common standards for taxi service by cities; each North American city has set its own standards for taxicab services, just as in Seattle. However, most airports in North America have advocated the adoption of a common set of taxi standards. These are:

TAXICAB SERVICES:

- A reasonable age for airport taxicabs is between 3 to 7 years model years old.

- Taxi drivers should be required to adopt some form of uniform dress code – either by company or as a general minimum standard for the industry.

- The minimum age for a commercial taxi driver should be 21 to 25 years old - depending upon local insurance requirements.

- The minimum driving experience required for an airport commercial taxi operator should be 1 to 3 years within the community.

- Airport, taxi drivers, taxi firms, and the community benefit from either an exclusive taxi concession at the airport or some mechanism to limit the number of taxicabs that service the airport at any one time.

- The taxi company, the taxi vehicle owner, and the taxi operator should be held responsible for the actions of the taxi operator.

- The minimum level of insurance individual taxi vehicles should be required to carry at an airport is 100/300/100.

These standards were developed by members of the Airport Ground Transportation Association and adopted at their Fall, 2005 conference in Toronto, Ontario.

Most important for the City of Seattle and King County are the adoption and codification of taxi service standards that assist the industry to improve their level of service and attitude of some of its drivers. Requirements for driver knowledge, dress, and treatment of customer need to be infused within City and County taxi regulations for the future health of the industry. As previously mentioned, electronic feedback from internet and mobile apps on the quality of taxi service provided needs to be collected and acted upon by the City and County as well as the taxi permit holder.

7. Review and Analysis

In this section we have drawn together the various elements of our study to identify key areas of strengths and weaknesses in the Seattle and King County taxi market. The section addresses the identification of patterns of demand including demand observed through vehicle use; and comments on the extent of unmet and latent demand. In section 7.1 we outline service demand and demand patterns as a baseline, and continue, in section 7.2 to identify trip type and potential demand, in section 7.3.

A number of significant differences between modes have emerged, both in terms of expectations, and actual service delivery, and these are likely to make uncomfortable reading for the taxi provider, while being more positive toward newer market entrants. Service levels and reported perceptions also suggested a more fundamental issue in the supply of taxis than issues related to numbers of licenses alone. To understand this in more detail it is appropriate to define the nature of current demand and the distribution of supply. This is addressed in terms of a service baseline reflecting current use.

7.1 Service Baseline

The team has identified current levels of services as a baseline against which policy and market development may be compared. A higher number of trips are currently provided by taxis than other modes, though the balance between taxis and other modes has changed, and continues to develop. Newer market entrants, particularly the Limo, have contributed to a growth in the market, but should also be noted as expanding particularly rapidly. The total numbers of Limos available in the Seattle market now exceeds the numbers of taxis, though their reported use remains lower. It is likely that this will start to have a downward pressure on the numbers of trips made by taxi. With open entry into the limo market being practiced by the State of Washington, it may also be expected that there will be increasing pressure as on-street monitoring of these new market entrants is difficult if not impossible to regulate with only a few inspectors.

The movement of trips from taxi to other modes is likely to be exacerbated as a result of taxis operating near capacity at weekend nighttime peaks which have a profound impact on the utilization of taxis over a relatively short peak period. Difficulties in engaging taxis on Friday and Saturday nights reflects a fundamental problem in defining numbers in a controlled market though the same does not apply to Limos, or Rideshare, which operate in a market without limitations on numbers. Their only operating limitation is that they are required to be pre-arranged but as the experience with FHV demonstrates, this requirement is often violated as competitors vie for these taxi type trips. This disparity may be unbalanced and working against the interest of the taxi, which are likely to continue to see increases in

the use of directly competing modes, with the taxi being both expected and unable to provide comparable services over a visible peak.

The difficulties in competing reflect both difficulties of being an incumbent in a changing market, and operating in a market that is restricted for some vehicles and not for others. This might be compared to the loss of business felt by incumbent airlines following airline deregulation, having defined working practices and investments in 'land based' dispatch technologies that compete poorly with new market entrants, market entrants operating to a differing set of regulations and a number that may operate without regulation at all.

There is also a concern that the rationale for preserving or protecting taxicab service through limited entry, that is, having a reliable on-demand 24/7/365 privately provided public transportation service, is being out maneuvered by new entrants into the market place. Council regulations have developed to reflect recent changes, most recently requiring regulation of new entrants in terms of insurance and prohibiting direct hailing; but continue to face concern from traditional suppliers that many of the new entrants are not being required to have commercial liability auto insurance, charging a set price at all time, vetting of drivers and vehicles, and accepting cash as one of their methods of payment. It is also a concern that despite new regulation these new entrants will soon drop their practice of only operating pre-arranged trips and adopt a pick up by hail approach, especially on busy Friday and Saturday evenings.

7.2 Demand Categories and Impacts

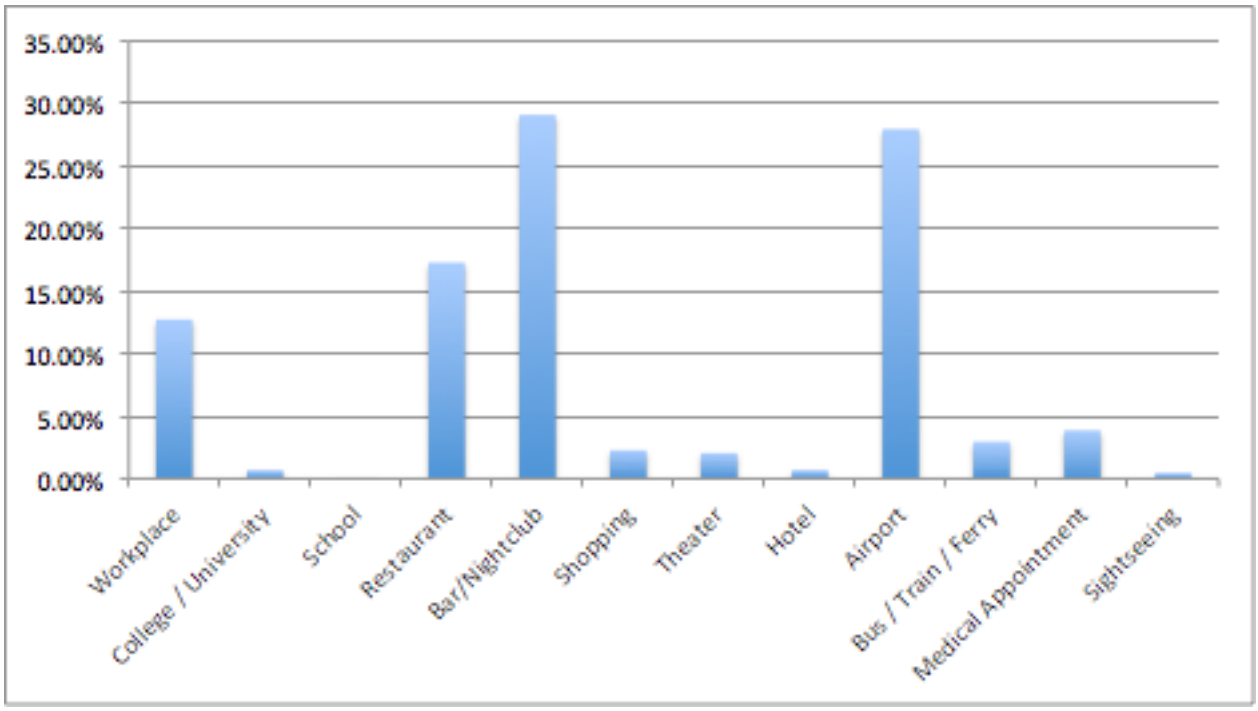
The presence of a time based peak, reflecting high levels of demand at weekend nighttime, highlights an issue in market equilibrium but does not fully illustrate the impacts of peaking on the wider market, nor does it fully describe conflicts in meeting demand during a distinct peak, and maintaining a viable industry.

A total of 11 distinct user categories were identified on the basis of the type of premises from which travel originates, set out in detail in section 5.5. Categories identified relate to: residential trip origins, trips originating from workplaces; colleges; schools; Restaurants; Nightclubs; Shopping trips; Theaters; Hotels; Airport; transit and Medical facility locations. Of these, three primary categories can be identified related to residential trip origins, restaurant/bar/nightclub and airport. Some restaurant trip origins may be associated with nighttime activities together with restaurant/bar/nightclub trip origins, and these are further identified by time, see section 5.5.3. Looking at the time patterns for bar/nightclub trip production, 93% of all restaurant/bar/nightclub trips occur between 9pm and 3am, of which 67% occur in Seattle between 9pm Friday - 3am Saturday, and 9pm Saturday to 3am Sunday.

Nighttime trip origins, both restaurant and restaurant/bar/nightclub trip productions, can coincide with temporal peaks identified above, and this suggests a need to consider solutions that address peaked demand over these periods.

Residential trip origins cannot be classified in the same way as they represent a location rather than an activity. We have addressed this by identifying trip destinations for residential originating trips, see section 5.5, though these represent a differing spread of uses, see figure 38. Demand for travel to night time activities are highlighted and should be correlated with the timed peaks in utilization, see figure 16, and do not coincide with the very high peaks more associated with homeward travel. This observation is likely to reflect the nature of travel to activities being spread over a longer period than the concentrated return times as venues close.

Figure 39 Trip destinations, residential trip origins



Source: Public Survey

While it may be appropriate to address a distinct weekend nighttime peak by considering additional supply options, or by permitting legitimate pre-arranged service providers to offer hail or on-demand service, the same may not apply to other time periods, raising the significant dichotomy between matching peaks in demand while maintaining a viable taxi market. The problem arises in that shortfalls in demand are not apparent across the majority of the week, illustrated in taxi vehicle utilization rates, see figure 13. Furthermore, as the new market entrants continue to grow, it may be argued that the wider taxi market is not, in fact, restricted with increased demand addressed, at least in part, by the presence of new market entrants.

7.3 Latent demand

The concept of latent demand follows the potential that trips may be avoided as a result of poor service quality or a lack of supply. Most cities have some presence of latent demand in the taxi industry most commonly attributed to a lack of supply. In other words insufficient vehicles exist to serve the demand that would otherwise be realized. Common 'solutions' are often related to increasing the numbers of licensed vehicles within a taxi fleet with the forecast effect of increasing supply. Seattle differs from this in that most measurements indicate that a sufficient number of taxis are available to meet a significantly greater number of trips than are currently served. The exception to this is weekend night-time for travel home from entertainment, discussed in more detail above. In short the presence of latent demand outside the weekend nighttime peak is more likely to reflect a structural failure, including service quality, in the taxi market than a lack of pure vehicle numbers.

A number of structural issues are noted, not least a proportion of unmet trips may be (perceived as being) unprofitable to the operator. Taxi associations do not appear to encourage supply of trips and have only limited controls on taxi vehicle quality or driver appearance are visible in day to day operation. The latter reflects another fundamental issue associated with the contractual relationship between taxi associations and the independent contractors providing taxi services. Associations appear unwilling or unable to enforce stringent service or driver quality codes, often as a result of the independent contractor relationship between company and driver, which may suggest benefit from a city and county defined standard, enforced by association, and ultimately the licensing authority. Accessibility of vehicles is another issue that may contribute to trip suppression, though we do not argue in favor of complete conversion of the fleet to accessible vehicles.

On the basis of observed patterns of use, including the ready availability of taxi-like vehicles operating in an unrestricted market, it may reasonably be suggested that supply based latent demand exists in the nighttime peak at the weekend. Other 'structurally' based latent demand may also exist in more distant locations, but this is less likely to be solved by a change in the numbers of vehicles available.

Taxis continue to serve the largest share of the market, rapid growth in alternatives are changing the balance between traditional taxi use and new use. Observed excess demand for taxis, which might also be described as a lack of supply of taxis, is observed at weekend night times, but is challenged by the incoming newer market entrants, particularly Limos, whos own vehicle utilization is also peaked in line but at a lower level to that of taxis.

More fundamental structural issues may provide a better explanation for a lack of use of taxis, rather than their absence alone, which may in turn reflect the need for more stringent quality controls rather

than more open quantity ones. The same observation is likely to be true of FHVs, which the city and county can influence through regulation; and limos, which the same bodies cannot influence.

8. Conclusions

Our study has developed and applied a detailed review of the taxi market in Seattle and King County. The market has emerged from a long period of stability, to a more rapidly changing combination of services including provision by taxi, FHV, limousine, and rideshare services. The market to the services has grown over time, with a significant growth associated to the development of app based services. New entrants to the market appear to have a positive effect to date in encouraging access to the taxi market without having a significant impact of the number of traditional taxi journeys, though this is likely to change with a recent expansion in the numbers of Limos serving the area.

The expansion in new services has the impact that local users, who are aware of the array of services available, are unlikely to face a shortage of supply. This should not remove the importance of ensuring traditional taxi services, or a version thereof, remain available and viable in the long run. Equally, pressure to support or permit newer services should not happen in the absence of controls to support and protect the public.

Factors which affect demand for taxi and taxi-type trips are primarily related to an area's demographics, living patterns, and especially not driving after drinking. With drunk driving laws, more people are choosing to arrange for a commercial transportation provider or friends to provide transportation when dining out and/or spending an entertainment evening out with friends. This has resulted in significantly greater demand for taxis and taxi-type services on weekend evenings as show by several surveys and taxi dispatch data in this report.

The difficulty faced by the City of Seattle and King County is how to accommodate this significant surge in taxi and taxi type trip demand without adding additional taxi permits that would negatively affect incomes of the taxi driver and preserving on-demand public transportation service at all times of the day or night throughout the region. This may be alleviated by allowing FHVs and Limos the legal right to pick up hailed trips during defined hours, to coincide with measured times of excess demand based on vehicle utilization figures set out above, from 7pm – 3am on Friday and Saturday nights. This measure would need to be accompanied by enforcement at other times, which may be based on electronic monitoring using a wider range of electronic data to be supplied by operating companies and associations.

Some evidence of latent demand is apparent, though this is limited to a peak at weekend nights at which point existing taxi services, and some limos, may be heavily utilized and unable to respond to additional requests. Service response times are equally matched by poor and very poor responses in

terms of taxi quality and service standards. The lack of basic service levels may outweigh, or at least match, the availability of services at reasonable response times, and is widespread in the taxi industry in all locations and by most respondents.

The latter issue, that structural quality issues are affecting demand for services to the same and greater extent that vehicle trip numbers alone should suggest that these in isolation are not a sufficient metric in judging the need for additional vehicles. Moreover as the taxi market, as opposed to the taxi industry, is open and derestricted in terms of number of vehicles – that no quantity control is in place on Limos (or Rideshare), the effectiveness of a limit placed on taxi license numbers should also be considered.

Regulatory controls may support the taxi industry in 'cleaning up its act', most particularly in defining service criteria and minimum standards (of dress, cleanliness etc.) may also be appropriate. The taxi industry falls behind on a number if metrics of service quality, and this should be a focus of the industry itself.

9. Appendices

9.1 Secret Shopper Responses

Please describe your experience in getting your ride. If you accessed your ride by phone, describe the dispatch experience. If you accessed your ride by internet or smartphone app, describe the user interface and whether you received any confirmations or follow-up; if you accessed your ride at a taxi stand or by hailing, describe how the driver approached you.	Contact Type
I was originally asked to get a cab from Company X. The dispatch told me that no cab would be available until 9 or 10 AM. I said that was too long to wait, so I called Company Y. The dispatch took my name, phone number and location. I was told that the cab would be about 15 minutes. The cab arrived in 20 minutes. The driver called me before arriving to ask my exact location. I helped him find me and he pulled to the sidewalk where I was standing. I was asked my name and I affirmed it. He did not get out of the cab, I let myself in.	Phone
I called dispatch and they asked my location and where I was going. They also took my phone number and name. The dispatcher said that they had no one in the area and the cab would take at least 30 minutes. I said this was okay and we hung up. The cab arrived 30 minutes later (exactly) and the cab driver called me to tell me he had arrived. He was across the street, so I had to cross the street to get to him. He said hello and asked my destination. He did not interact with me other than this and did not look at me.	Phone
Web phone numbers for this carrier are numerous. It took several phone calls to get the correct number for arranging a ride. The first call ended with a "call back during normal business hours" message. The second call was answered by a fax machine. The 3rd call rang 22 times with no answer. The 4th call was dialed after seeing a taxi drive by with the number on the side. After completing the call for a pickup, the driver arrived within 6 minutes.	Phone
I called dispatch and the phone was answered immediately. I was asked for my location and my name. The dispatch told me a cab would be there in 15-20 minutes. The cab arrived in 11 minutes. He pulled up to where I was standing and asked me my name. I told him my name and he said okay for me to get it. He was friendly, asked me about my day and what airline I was flying on.	Phone
I called the cab company and the phone rang 6 times before being answered. I was asked for my address and name. The dispatch told me the cab would be 10-15 minutes. The cab arrived in 9 minutes. My phone rang and an automated voice told me that my cab had arrived. The cab had pulled over to the sidewalk ahead of me. I walked up to the passenger side and the driver asked my name to confirm my identity. I said yes and he indicated for me to get into the cab. He did not leave the driver's seat.	Phone
The driver approached me easily as there was no one else anywhere who appeared to be looking for a Taxi at this hour. He already had the destination address but confirmed it. We hit the freeway immediately and then exited at Union Street. The driver drove pretty fast, accelerating on the freeway very quickly reaching 65MPH. He said nothing until we reached the destination whereupon he pointed out the corner of the address I had given. I asked if I could pay with a card. He said "Cash is good but I can do credit card if that's all you have." Payment was quick. I asked him to add $5 tip to the slip. As did the other drivers from this company, he added the tip to the basic fare. As there was almost no traffic at this time of night, the ride was otherwise uneventful.	Phone

Please describe your experience in getting your ride. If you accessed your ride by phone, describe the dispatch experience. If you accessed your ride by internet or smartphone app, describe the user interface and whether you received any confirmations or follow-up; if you accessed your ride at a taxi stand or by hailing, describe how the driver approached you.	Contact Type
I called the cab company and dispatch hung up on me twice (accidental disconnection on their part). The third time I called; the dispatcher argued with me over the address and didn't try to help me. I knew the address was correct, but I supplied landmarks and buildings. The dispatcher just kept telling me the address was not correct and it felt like she was ready to hand up on me. Finally, I got her to find the address and she told me the cab would be less than 15 minutes. After 15 minutes, I called the dispatcher to ask where the cab was. He said that the cab had arrived and didn't see me, so he had left. He said she would dispatch another cab and it would be there within 10 minutes. The next cab arrived in 7 minutes. I got into the car and the driver asked me where I was going. When I told him I was going to Bellevue (requires going through heavy traffic both ways) he told me that he was getting off his shift soon and it would take too long. He pulled over to the side of the road to talk to another cab driver. He asked the other driver if he would take me to Bellevue. The other driver said no, he had another fare to pick up. My driver dropped me off on the sidewalk and told me to call another cab. I called another cab and the second cab that we had talked to showed up. This driver was upset when he saw me and hesitated a long time before letting me get into the cab. He kept asking me why I didn't stay in the other cab and complaining that the other guy stuck him with a really bad fare. This continued for about 15 minutes and made me very uncomfortable. The driver was visibly upset that he had to take me.	Phone
I called dispatch and the phone was answered immediately. The dispatcher was female and she sounded very tired and disinterested. She answered the phone by asking what my location was. I gave her the location. She asked my name and phone number. I was informed that the cab would be there in 5-10 minutes. This was at 1:42. The latest the cab was estimated to arrive was 1:52 PM, so I called at 1:55 PM. The dispatcher informed me that the cab was a half mile away. The cab arrived at 2:01 PM. The cab pulled to the sidewalk and sat. They were about a block from where I was, so I walked to him. I approached the car and he asked my name to confirm my identity. I said yes and he indicated for me to get into the cab. He was smiling and greeted me.	Phone
I called the dispatch center and my call was taken immediately. The dispatcher asked my name and location. I was informed that the taxi would be there in 10-20 minutes. The dispatcher was pleasant and the phone call was easy. The taxi cab arrived 20 minutes later. He rolled down the window and asked my name to confirm my identity. I affirmed and he indicated for me to get into the back of the cab. He did not get out of the driver's seat. When I got in, he asked me for the address of my destination.	Phone
I called Company X and they took the following information: my name, location and destination. They put me on hold for 20 seconds and came back on the line to tell me that they had no one available to pick me up. They said they could arrange for a ride in an hour or two. I declined and called Company Y instead. They picked up the phone and said they would be there in ten minutes. They arrived in 9 minutes.	Phone
I called the cab company and was immediately helped. The dispatcher asked my location and name. They then informed me that the cab would be there in 15 minutes. The cab driver called me after 9 minutes and clarified my location. He arrived one minute later and pulled to the side walk that I was standing next to. He did not get out of the cab, but rolled down the passenger window and greeted me. I let myself into the back of the cab and the driver asked my destination.	Phone

Please describe your experience in getting your ride. If you accessed your ride by phone, describe the dispatch experience. If you accessed your ride by internet or smartphone app, describe the user interface and whether you received any confirmations or follow-up; if you accessed your ride at a taxi stand or by hailing, describe how the driver approached you.	**Contact Type**
I called dispatch and they took my name and location. The dispatch was friendly and helpful. She informed me that the vehicle would be there in 10-15 minutes. The vehicle arrived in 10 minutes. He pulled up to where I was standing on the sidewalk and asked my name to confirm my identity. He welcomed me and indicated for me to get into the back of the cab. He asked me for my destination's exact address. We then left.	Phone
I called the dispatcher and immediately was helped. She asked my starting location, name and phone number. She told me that a cab would be there in 15 minutes. The cab arrived in five minutes. He pulled over, rolled down the passenger side window and asked my name to confirm my identity. He did not get out of the car, but indicated for me to get into the car. He asked me what my destinations was, how my day was going and why I was taking a taxi. He was friendly and engaging.	Phone
I called the cab company and they picked up immediately. They took my location and phone number. I was informed that the cab would be 5-20 minutes. The cab arrived 24 minutes later. The driver pulled into the parking lot and parked. He had his passenger window rolled down and ask if I had ordered the cab. I said yes and he indicated for me to get into the back. He did not get out of the car. He asked where I was going and we started driving. He was friendly; he asked me how my day was going and why I was going to the airport.	Phone
I called the cab company at 10:35 PM. I was placed on hold for three minutes. The dispatcher took my name and location. He told me the ride would be there in 1-5 minutes. The cab arrived 10 minutes later. He pulled over to the sidewalk I was standing at, rolled down the passenger window and asked my name to confirm my identity. I said yes and he indicated for me to get into the cab. I let myself into the cab and he asked where I was going. We then left without saying anything else or engaging in further conversation.	Phone
I called dispatch and the operator took my location and name. He told me that the cab would be there in 10-20 minutes. The cab arrived in 11 minutes. The cab driver got out of the cab and opened the back door for me. He was smiling, welcoming and friendly. He got back in the car and asked me where I was going. We then proceeded on the route.	Phone
I called the cab company and the dispatcher said the cab would be there in 5-10 minutes. After 15 minutes of waiting, I called the dispatcher to ask what the status was. She said that no one had picked up the call yet (no one was on their way to me). She said that it would be another 5-10 minutes. The cab arrived 12 minutes later. They pulled to the side of the road, rolled down the passenger side window and he asked my name to confirm my identity. He did not get out of the cab and so I got into the back seat on my own.	Phone
The driver called after I made the smartphone request and stated that she was caught behind some foot traffic because of a block party. She confirmed her estimated arrival time. The area was very dark and as such, the driver was coming slowly up the rather narrow street. I made myself visible and the trip began about 9 minutes after making the request. The smartphone application confirmed each step accurately including a notice that the driver was one minute away.	Smartphone App
I opened up the smartphone app "Taxi Magic" and input my address. It gave me a list of cab companies to choose from. I was supposed to choose Company X but the button said that the App service was not available at that time. I pushed it anyways and the offered the option of calling the cab company instead. I choose to do this. I was connected with dispatch. She asked my current address and phone number. She told me that the cab would arrive in 10 minutes. The cab arrived in 8 minutes. The cab driver pulled over to the curb on the opposite side of the street and called out to me. He had me cross the street and get in the vehicle.	Smartphone App

Please describe your experience in getting your ride. If you accessed your ride by phone, describe the dispatch experience. If you accessed your ride by internet or smartphone app, describe the user interface and whether you received any confirmations or follow-up; if you accessed your ride at a taxi stand or by hailing, describe how the driver approached you.	Contact Type
I opened the smartphone app Taxi magic and it asked me whether I wanted to be picked up now or later. I said later. It then asked me what time, I entered 1:00 PM. It then asked my location and destination. I confirmed the ride by pressing the "confirm" button. Three minutes later, I received a confirmation of my order and an approximate distance from my location. The app said my ride was 3 miles away. At 12:55 PM the driver called and confirmed my location. He told me he would be there by 1:00 PM. At 1:00 PM, he called me and we straightened out my location. He then arrived at 1:03 PM. He pulled over, rolled down the window and asked if I was the one who needed a ride. He stayed in the car and indicated for me to get into the back. I was asked to confirm my destination and then we started the ride.	Smartphone App
I opened the smartphone app and chose the type of ride I wanted. I hit "request ride." The GPS found my location and displayed the nearest driver on a map, along with the estimated time of arrival. The ride was estimated to arrive in 16 minutes. They showed up in 17 minutes. The driver got out of the car and opened the door for me. He was very friendly, asked me about my day and smiled sincerely.	Smartphone App
I opened the smart phone app and it asked me the type of car I wanted and my location. I then pressed the "confirm ride" button. The app told me where the nearest driver was, showed me on a map and gave me an estimated time of arrival. The car arrived in exactly the amount of time the smart phone estimated. The driver came to where I was on the sidewalk, got out of the car and opened the door for me. He had a big smile and welcomed me warmly.	Smartphone App
The application originally indicated no drivers were available. However, a few moments later, a driver was available within 1 minute. About 4 minutes later, the vehicle arrived. The driver was calling as he approached the address given. The driver's car was immaculate and the driver very clean and professional looking. The driver was slightly confused by the destination address as there were two streets with similar names in the Green lake area. He asked if I recognized my destination once we arrived at the wrong address. I said I have never been there before and stated that the Street was closer to the lake. He immediately knew where to go and we went straight to the correct location which was only about 6 blocks away. I completed the payment with the driver watching before exiting the vehicle. The ride ended at 1:20AM. This trip was relatively uneventful except for the address confusion.	Smartphone App
The driver arrived curbside about 6 minutes after I requested the ride on my smartphone. The driver introduced himself and asked my name to confirm my identity. I said yes and he confirmed his name. I examined the license on the back of the vehicle. I then asked "front or back" and he said the front was fine. As we left, I confirmed where we were going when he asked about that. The car was a clean, very new looking Prius and was quiet. The driver was very well dressed, clean, sharp and professional. During the trip, we conversed about the central banking industry and American court and justice systems. The route we took was a combination of side streets and major thoroughfares and did not involve any interstate travel as I had thought it might. He arrives at the destination at about 1:06AM and it was explained to me how the payment system worked with the company. I made a payment of $25 and exited the vehicle. During the trip, I did not notice that the driver was ever distracted by any call for another pickup or other issue. The trip was easy, fun & safe.	Smartphone App

Please describe your experience in getting your ride. If you accessed your ride by phone, describe the dispatch experience. If you accessed your ride by internet or smartphone app, describe the user interface and whether you received any confirmations or follow-up; if you accessed your ride at a taxi stand or by hailing, describe how the driver approached you.	**Contact Type**
I opened the smart phone app, entered my location and destination. I was then asked to confirm my ride. The app informed me that my ride would be there in 16 minutes. At exactly 16 minutes, the driver called and told me that the traffic was really bad and that he was just getting onto a major freeway (520) to get to me. He also told me that it was going to be at least another 20 minutes. After thirty minutes, he text messaged me to let me know he would be there in 10 minutes. He arrived in exactly 10 minutes. The total time from ordering the cab to the cab arriving was 49 minutes. The driver was really apologetic and courteous during the phone call and when he arrived. He pulled into the parking lot behind my location and called me. He asked me to walk around the building because of the traffic; he could not arrive to the front of the building where I was. I walked around the building and found him in the parking lot and approached the vehicle. He rolled down the window to greet me, invited me to sit in the front seat with him and I did. He introduced himself and shook my hand. He smiled big and was friendly.	Smartphone App
I used the Taxi Magic Application. A driver called back to confirm my location and destination. The call dropped as the driver was moving when he called. He did not callback but I had captured his number with caller ID so I called back. The driver passed my street twice before I flagged him down. He asked my name and I affirmed it. I entered the vehicle and the ride began. I did not notice Taxi Magic confirming any aspect of the trip but I did notice that while we were en route, I checked the application for any confirmation and found that the application had logged me out where I had been logged in for days right up until the ride began.	Smartphone App
I opened up the smart phone App and confirmed my destination. The App showed where the Lyft car was on the map compared to where I was and the estimated time of arrival. It told me that the car was 5 minutes away and counted down the minutes. The car arrived exactly on time. The driver rolled down the window and asked my name to confirm my identity. He was smiling and very welcoming. We sat in the car for a few minutes while he typed in the destination, we chatted and he found the best way to the location.	Smartphone App
I used the App Taxi magic. It asked to confirm the starting location, which I did (the GPS did this for me). It then asked me to confirm the ride order, which I did. The App showed where the cab was on the map and the estimated arrival time. The taxi driver called me 1 minute before the estimated arrival time and confirmed with me my exact location. Taxi pulled up right on time in front of the sidewalk. He asked my name and confirmed that I was his fare. He stayed in the driver's seat while I let myself into the back seat. He then asked me where I was going and how to get there. He was friendly; he asked how I was and how my night was going. After this, he did not talk to me during the ride.	Smartphone App
I used the smartphone app, it asked what type of car I was requesting and where I needed to be picked up. It then displayed the current location of the ride and the estimated time of arrival. The car showed up exactly on time. The driver rolled down the window and greeted me cheerfully. He did not get up but indicated for me to get in the back seat. He then asked my destination and asked me how my day was going.	Smartphone App

Please describe your experience in getting your ride. If you accessed your ride by phone, describe the dispatch experience. If you accessed your ride by internet or smartphone app, describe the user interface and whether you received any confirmations or follow-up; if you accessed your ride at a taxi stand or by hailing, describe how the driver approached you.	**Contact Type**
I opened the smartphone app and it asked for location. I entered the location and it asked my destination. It then asked me to confirm the ride order. The app said that the car would arrive in 7 minutes and it did. The driver parked the car, got out and opened the door for me to get into the back. He smiled, was really friendly and welcoming. The car was very nice and climate controlled. The driver asked me some questions about my destination, my day and how I was feeling. It was a great experience.	Smartphone App
UBER has an android app that I used to order a car through. The App asks you to give your pick up location, drop off location, choice of vehicle, time and cost. It gives you an estimate of arrival time and keeps you updated. The car arrived on time and in the exact place I was. The driver parked the car, got out and opened the door for me. She used my name when she greeted me. The driver moved the seat for me, helped me with the luggage, smiled, was friendly and offered me a water bottle. I also had a coffee cup with me and she indicated where the coffee cup holder was.	Smartphone App
I used the smartphone app "Taxi magic". It asked me if I was ready to picked up now or wanted to arranged a pick time for later. I picked "ready to be picked up now." It asked me for my address, which it found by GPS and I confirmed that it was the correct location. The app indicated that a cab was contacted and on its way after three minutes. The estimated time of arrival was 5-10 minutes and the map showed me where my driver was (and updated its location every minute). The cab driver called me after eight minutes and confirmed my location and told me he would be another 5 minutes because he got turned around. The cab pulled up at the opposite side of the street and the cab driver motioned for me to cross the street. I crossed the street and the driver stayed in the driver seat. He indicated for me to get into the back of the cab. He greeted me and asked how I was. I was then asked for my destination and the exact address.	Smartphone App
I used the smartphone app, entered my destination and ordered the cab. The estimated arrival time was 5 minutes. At the five minute mark, the driver called me and clarified where I was. He told me he would be there in a few minutes. He arrived three minutes later. He pulled over, rolled down the passenger side window and asked my name to confirm my identity. He did not get out of the cab, so I let myself into the back seat. He asked my destination and asked for clarification/exact address. He waited until I looked it up on my smartphone.	Smartphone App
I opened the Smartphone App "Taxi Magic." It entered the current location and submitted it. The App said it was ordered but did not give an estimated arrival time. I waited eight minutes and the taxi cab driver called me. He said he was one minute away and confirmed my exact location. The taxi arrived one minute later. He pulled over to the side of the road where I was waiting. He rolled down the passenger side window and asked my name to confirm my identity. I said yes and I let myself into the cab. He asked what my destination was and commented that it would be very difficult to get there. I was going to the Coleman dock and it was across the heavy downtown traffic. The driver left after this with no further comment.	Smartphone App
I used a smartphone App (Sidecar). I entered the pick up 8:00 PM and the directions said that car would arrive in 15 minutes. At 8:20 PM, they had not shown up so I took a taxi from the taxi stand. There were three cabs waiting the entire time I was there (8:00-8:20). When I approached the cab, the driver rolled down the window, offered me a ride, popped the trunk and put my luggage in the trunk.	Smartphone App

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I was on the sidewalk at the drop off part of the airport. I waived to a few taxis, each of them were waiting for someone to pick up. It took me 4 minutes to find a cab that was available to take me. The driver was friendly; he got the door for me and got into the cab. He asked me my destination and we left. He did not know the route to where I needed to go, so I had to look it up for him on my smart phone.	Street Hail
This was a street hail. The first cab to come by stopped for me but it was about a 30 minute wait. I said Belltown as he stopped and he said "Okay, front or back, your choice."	Street Hail
It was late and not many people were about. This was a street hail ride. The driver had no trouble spotting me as I was truly the only person around except for a hotdog stand closing down. The driver asked me where I was going. I said "Fremont." He said "Okay." The ride began.	Street Hail
I had a very difficult time getting a cab to stop for me. There was quite a bit of foot traffic and others catching rides before I began trying. However, several small groups of young women wearing tight shorts and heels were picked up right next to me within 2 minutes where I had been standing for at least 15 minutes and ultimately 27 minutes. This happened 3 times. I did not catch a ride until I walked several blocks away from where others were catching rides. Once I got a cab to stop for me, it was completely professional, courteous and efficient.	Street Hail
To get to this first location for pickup, I had to park 7.5 blocks away after looking for nearby parking for 15 minutes. The area was surrounded by tall building construction and light rail installation. The walk took a good 15 minutes from where I parked. As such, the first attempted pickup did not happen at 10:30. I hailed a taxi from the street beginning at 11:01PM. There were several other parties already waiting for rides so it took some time; approximately 20 minutes. Additionally, there was a man who was bothering the earlier parties to ride for free in the same direction as the paying party. The driver's stop was professional, safe and he was smiling as he slowed down. He asked me where I was going and I told him a few blocks off Ballard Ave and Market Street in Ballard. I asked "front or back" before opening a door. He said either was fine. The man attempting to ride jump delayed pickups including my own as it took several minutes to get the man away from the vehicle so that the vehicle could safely drive away. The ride was seamless and fast. The driver took a route that seemed the long way but I believe it ultimately took no longer getting there than any other way might have taken at that hour. The driver was talkative, courteous and friendly. At one intersection, another cab was waiting at the light with us and the drives spoke quietly through the open windows. The weather was nice so the open windows were not a bother at all.	Street Hail
I went outside the ferry terminal and stood on the sidewalk near the road. A taxi pulled up in two minutes. The driver rolled down the passenger side window and asked if I needed a ride: I said yes. He unlocked his doors and indicated for me to get in.	Street Hail
I arrived at the Cruise ship terminal and observed a long line of taxi cabs. I approached 3 sitting taxis to ask for a ride; they all told me to go somewhere else after finding out that I was only going a short distance. I finally found a taxi cab driver that would take me, but he let me in the cab before finding out where I was going. He stayed in the driver's seat while I opened the back door and let myself in. When I told him my destination, he looked a little irritated and drove really fast. (Note: this cab car line was waiting for airport fares).	Street Hail

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1. I arrived on the sidewalk outside Pier 66 and observed a long line of cabs waiting. I approached one of them and asked them through the passenger window if I could get a ride. The cab driver said I needed to go to the front of the cab line to get a cab. I walked to the front of the cab line and asked for a ride. The driver talked to me through the passenger window. He said to get in. When he asked me where I was going, he was disappointed that I was not going to the airport or a further distance. He made angry comments under his breath the whole duration of my ride. I could not make out exactly what he was saying, but he definitely seemed disgruntled.	Street Hail
I went outside the Westin (Downtown Hotel). I observed four taxis waiting for fares. They were parked and the drivers were standing on the sidewalk talking. When I approached them, they asked if I needed a ride and where I was going. When they found out that my destination was not very far away, they both seemed reluctant to give me a ride (less commission). They argued over who would take me and then final one decided to take me. He did not open the door for me, but got in himself and waited for me to get in the car. He did not talk to me the rest of the ride.	Street Hail
I waited by the side of the road starting at 5:10 PM. The cab arrived in 30 seconds, waiting by the sidewalk. I approached the cab and the cab driver rolled down the passenger side window. He asked if I needed a ride and invited me to come in the cab. He did not exit the cab or offer to help me with my bags. He stayed parked and asked me where I was going (destination). I gave him the location and he knew immediately where to go. After this, he did not speak during the ride.	Street Hail
I was outside the restaurant and there were 4 cabs waiting along the sidewalk. I walked up to a cab and the driver rolled down the window to tell me he was available. He did not get out of the cab, but unlocked my door and allowed me to get in. He asked where I was going and we left immediately. He did not talk to me for the remainder of the trip.	Street Hail
I was outside Safeco Field and there was a taxi waiting. He asked me if I needed a ride and I accepted. I did not have to wait.	Street Hail

Please describe your experience in getting your ride. If you accessed your ride by phone, describe the dispatch experience. If you accessed your ride by internet or smartphone app, describe the user interface and whether you received any confirmations or follow-up; if you accessed your ride at a taxi stand or by hailing, describe how the driver approached you.	**Contact Type**
1. This was scheduled to a smartphone ride using UBER application. The UBER application would not authenticate my mobile number via the text messaging or short code texting indicated on the UBER website or the UBER Android application. My cellphone is uses Android Smartphone OS and I have no problems with it for other applications. The phone uses the T-Mobile network on a no-contract service called Solavei which is top-tier on the T-Mobile network. I had exactly the same problem on a prior shop with the same phone and application. As UBER has no telephone number for calling for service, the only alternative was to use another servicer. I had telephone UBER technical support and left voicemail days before and left my callback number. No one returned my call for support I had previously targeted two alternate services. When UBER failed, I telephoned the Company X. The dispatcher would not say anything else until I provided an exact address for pickup. When I provided the exact address, he confirmed the location across the street but not the correct location of the address I had provided. He then asked for the exact destination address. I gave him crossing streets which he refused to accept. I gave a full proper address whereupon he indicated my wait would be "no less than one hour, we have no drivers in that area and it's very busy tonight." I said that was too long and canceled the ride. This call ended at 11:48PM I then called Company Y taxi. I provided the pickup location and full address for destination. The dispatcher said, "Okay, he's on his way." I asked how long I should anticipate waiting. Without any inflection at all, he said "An hour." I canceled the ride. This call ended at 11:50PM I then hailed a Company Z Taxi at the corner of Ballard and Market. The ride started at 11:55PM. The driver was an older gentleman and he played swing/jazz music on his radio quietly. We talked about music, artists, the value of music to society and its use and meaning to the musicians who developed it and play it today. The ride was slightly slower paced or at least it seemed that way to me. The route back to downtown Seattle was different than the way I had been take to Ballard from Seattle on the first ride. The ride ended at 12:18PM.	Taxi Stand
There was a taxi stand with a line of taxis waiting for fares. There was no one in line to get a taxi, so I was immediately helped.	Taxi Stand
I went to the hotel valet and he called a cab for me. The cab arrived in one minute and the valet opened the door for me. The cab driver asked where I was going and we left.	Taxi Stand
I was supposed to get the taxi through the hotel, so I went to the front desk and asked for help getting a taxi. They told me to go out to the valet outside the hotel and ask them for assistance. I went out and was immediately helped by the valet. He asked where I was going, blew a whistle and the taxi pulled in front of my immediately. The valet told the driver where I was going and opened the door for me. The driver did not speak to me until we reached our destination.	Taxi Stand

Please provide any other comments about your trip.
The cab had a credit card machine attached to the passenger seat and accessible for me to use from the back seat. This made payment a lot easier. The driver was courteous, prompt and made me feel safe.
The driver needed help finding the way to the location. When the cab arrived at the destination, he had to look up several items in a binder to confirm the total fare. It took a few minutes for him to figure this out.
The driver did not provide any sort of receipt. He told me that the receipt paper was out. He also stated that he did not have any "cards," which are the blank receipts that can be hand written.
This driver was really nice and smiled a lot. The cab itself was a little dirty and scuffed.
This driver was prompt, courteous and customer service oriented. When we arrived at my destination, he asked if I would need another cab ride later in the evening and he provided me with his information if I needed further service.
The driver was friendly and helpful. The cab had a lot of scuff marks and ripped interior parts.
Driver handed me a blank receipt and asked me to fill it in for him.
This driver was friendly, the company dispatched within the timeframe, the ride was efficient and I was pleased with my experience.
The driver drove right past the Fred Hutchinson Center and that made me a little disappointed. He dropped me off at an alternate location instead of my original address instead taking me back to the location. That was a little disappointing.
Flat rate was $45.00. Driver was courteous and the cab was clean. The trip took 50 minutes.
The cab was a little dirty. The driver was not rude, but did not interact with me.
The driver was friendly; the car arrived sooner than estimated. The cab was a little old and beat up (seats severely worn), but acceptable.
The cab was metered. The driver was friendly and knew the best route to the airport for the traffic. It was rush hour. The cab was a little dirty, but it was mostly clean. The driver was friendly, safe and polite.
The driver added the tip to the basic fare of 20.70
I felt safe during the ride, but very uncomfortable about how the driver responded to having to take me to Bellevue. He made me feel really awful and kept persisting in telling me that I should have stayed in the other cab. This was a really bad traffic day and in general, a really bad hour for traffic. This particular route was especially tough and we experienced a lot of standstill and slow downs. The return trip for the driver was even worse and I knew he would spend another hour getting back to Seattle after dropping me off, so I gave him a bigger tip (for the extra time, not for any customer service).
This driver was courteous and friendly. The route was efficient and smooth. The cab was clean.
The car was a little dirty and scuffed. The cab driver did not engage me in conversation other than to take down my destination information and ask for payment at the end of the ride. The route the driver took seemed to take a lot longer than it should. I wasn't sure, but it felt like he took a lot of unnecessary turns and an indirect route to my destination.
This company uses individuals using their own personal cars. They are not certified taxis. Instead of collecting "fares" they collect "donations." These "donations" are collected through the smart phone app only. The vehicle, therefore, had no licensing. The driver was friendly and very engaging in conversation. He was prompt and his car was in excellent condition.
The driver was friendly and helpful. He had significant hesitation when it came to accepting credit card payment. He did miss the destination; drove right passed it and kept going; I had to tell him a few times that the stop was already passed. He drove well and I was satisfied with the ride.
The driver suggested alternate routes to get around some pretty bad traffic. He engaged me in friendly conversation, was courteous and polite.

Please provide any other comments about your trip.
The driver was in good communication with me, so I understood why he was late and where to go. The ride was efficient, friendly and comfortable.
The ride and the driver experience were very pleasant and I would look forward to taking this trip again.
The car was comfortable and the ride was efficient. The seats were a little worn and there were a few scratches in the window tinting. The booking was efficient and the booking method (smart phone) was very easy.
The cab was a little dirty and scuffed. The driver took a very long and indirect route to my destination either on purpose or accident (I assume it was purposeful to get more money).
The driver was pleasant; the ride was efficient and comfortable.
The smartphone app was really easy to use; however, it would have been nice to have an estimated time of arrival. The app only said that the car was being ordered, so I had no idea it if was even dispatched, let alone how long it was going to take to arrive.
The driver was quiet and kind. The ride was smooth and comfortable.
The trip took 22 minutes. The cab was clean.
I looked especially hard for the taxi licensing on the vehicle. Where I exited the vehicle, there was time to look the rear window and aft end of the vehicle over because of foot traffic blocking the driver. I could not see the tag anywhere.
The Driver was prompt and Courteous. The cab was clean and safe. The smartphone app was efficient, convenient and reliable.
The ride was very nice, efficient and comfortable. The driver was very courteous. Payment was very easy. Obtaining a ride was very easy. Promptness was very good.
This driver was very courteous, asked me questions about myself and was very upbeat and happy. He got the door for me both when arriving and departing. The ride was efficient and comfortable.
The driver explained that the fare was a "donation" which I could move up or down on a touch screen in his car. It was initially $21. I added 4 dollars to make it an even $25
Everything about this trip was efficient, comfortable and enjoyable. The driver was courteous, the car was clean and the arrival times were punctual. The payment method was very hassle free and easy.
Payment was not flat rate or metered, it was "donation." The "donation" was handled by the smart phone app. The driver was very friendly and courteous. The traffic was extraordinarily bad. This route took 51 minutes when it should have taken 20-25 minutes without traffic.
This driver drove really fast and was irritated that I only wanted to go a short distance. He was also not helpful when it came to payment. I did not find this ride to be very comfortable.
I felt really uncomfortable with the attitude of this cab driver. He was clearly overly upset about having to take me as a fare (as opposed to someone going to the airport). I also was made to feel bad about trying to pay with a credit card. This was not a good cab riding experience.
Cab drivers seem reluctant to take people short distances because they want the fares that go to the airport or longer distances. This ride was efficient but the driver did not make me feel welcome or appreciated.
This driver was efficient, friendly and pleasant. The cab ride was easy and efficient.
When I requested a receipt, the driver gave me a blank one and asked me to fill it out on my own. The driver did not talk to me during the commute. He was efficient and safe. The cab was clean and I enjoyed the ride.
The back of the cab did NOT have proper licensing for fare. There was only a Washington State license plate on the back of the cab.
The trip took 21 minutes. The driver did not know the route and continually needed me to guide him. The car was a little worn and dirty but acceptable.
The driver provided a blank receipt for this ride when I paid in cash.
Please provide any other comments about your trip.
I told the driver to go ahead and add a $5 tip. It appears he may have simply added the tip to the basic fare as I do not see the tip broken out on the receipt.
This driver was cheerful throughout the trip. He told me a funny story and asked me about my day.

I asked the driver to add a $5 tip. It appears the tip was added to the basic fare as the tip section was not completed.
It was easy to get a taxi going from the airport. The cab was new and very clean. The driver was courteous.
The trip was fast and efficient. The cab was clean.
The driver did not talk to me during the trip. The ride was safe, efficient and comfortable. The taxi cab was clean. When we arrived, we were on the opposite side of the street from the cruise ship terminal. Because the traffic was bad, the driver asked if I could get out and cross the street on my own. I thought that was worth mentioning because it was inconvenient for me to do so.

9.2 Institutional Survey Responses

What compliments or complaints do you receive from your customers about taxi, for-hire vehicle, and limousine/town car service? ***Response Text – Restaurants, Bars and Night Clubs***
The taxis usually run late and sometimes they don't show up at all. Plus the drivers sometimes complain when you use a credit card--or they lie and say that they do not take credit cards. Totally ridiculous and unacceptable. Town car service is the best and most reliable. They show up on time, the drivers are friendly, easy to order and pay.
Too long a wait
Unwilling to pick up our guests at the front door. Unwilling to take staff home at night.
Most customers complain about the taxi service. They call to request a cab but it never shows up--this happens pretty frequently.
I think that most people who use UBER services prefer it to taxis. The drivers are polite and well dressed. The cars are cleaner and the rates are competitive with taxis. I don't really get a lot of people complaining about their taxis.
Late arrival. Pick up the wrong customer. Very pushy, hurry them into the car. Dishonest price quotes. Arguing with other cab drivers for fares in front of patrons. Poor attitude. Belligerent.
Companies MUST put proper credit card machines in taxis like in every other city. Taxis have to wait on crowded downtown streets & get out an ancient imprinter. It is horrible. These companies need to bite the bullet as this is a cost of doing business these days.
Every now and again a taxi takes longer than usual.
Not many complaints but we are seeing people use UBER and other Black Car services as frequently as regular taxis
Taxis are often very late (30-40 minutes!) Or don't show up at all.
Late pickup. Rude drivers
Taxi being too expensive, hard to Catch a Cab, and Taxi drivers often select their customer (prefer longer distance)
We don't really receive any feedback as the customers do most of their bookings but we do have people ok with the idea of both Uber and the taxi line.
Don't know the area
Credit card refusal. Rudeness
Cab drivers are rude, do not know the area well and treat customers horrible. They even denied to pick up a disabled guest from a hotel
Taxi drivers is rude, yell at each other, cars aren't extremely clean. Limousine driver's don't speak great English, didn't discuss terms of payment properly limousine driver's cars are nice, comfortable ride, lots of trunk space
Mostly, how affordable the for-hire services are.
The fact that we call is complimented - we only get complaints when it takes a long time to show up
Lack of availability. Customers that want a taxi after drinking frequently give up on taxis if they can't afford an Uber and end up driving.
We don't hear about complaints

What compliments or complaints do you receive from your customers about taxi, for-hire vehicle, and limousine/town car service? ***Response Text – Restaurants, Bars and Night Clubs***
Specifically we receive rave reviews on the service that Uber provides. Before Uber our customers often waited 30-45 minutes and often longer for a taxi to arrive after calling the dispatch by phone. Very pleased with the Uber. I use it exclusively for my personal needs as well.
Don't know where to go to find a cab
Taxis are not willing to do 'short' trips. They argue, set up flat rates which are illegal for taxis and simply refuse to drive them. They argue about fares being picked up by other taxi's in their company and blame us for not knowing whose ride is who's.
Taxi drivers have been rude, sometimes they have refused to pick people up because the trip is not too long and they don't make as much money, cleanliness of the cars has been an issue (taxis)
For taxis - that they are scary drivers, weaving in and out of traffic, running lights, etc. Inconsistent service.
Taxis: certain times of day they are not available, some refuse credit cards, quite often if you are not going on a long journey they refuse to drive you, some do not speak English, Numerous occasions where drivers drive well out of the way of the destination (primarily from the airport) instead of a direct route, driver hygiene, driver's personal cell phone conversations (which is illegal in Seattle while driving). As of last week, a Taxi driver walked into our lobby and began screaming at the front desk staff because we are encouraging "for hire" companies.
Long waits
Our guests have had many issues with the taxi cab service. Often they are late or don't even show up. And with one group needing two cabs because the one name on the call left in the cab 1 of 2 they would not take the remaining group, instead made them call in again to request a ride. Most guests brush off the odor and rudeness of the drivers as just part of taking a taxi cab. It is not just the guest or rider that they are rude to, they are also rude to the staff. Often yelling if the rider is not ready when they arrive or if they decided to take different transportation options because they were tired of waiting for the taxi. Because we are a busy hotel, often the drive is blocked with people and no matter the time they will yell and honk the horn at other guests and drivers at the hotel.
Knowledge of area, customer service and cleanliness
Long wait times, Drivers allowing the wrong people to grab the cab, resulting in additional wait times to call an additional taxi. Long wait to speak to dispatch on busy night

What compliments or complaints do you receive from your customers about taxi, for-hire vehicle, and limousine/town car service? ***Response Text – Hotels***
Taxis - Compliments: they arrive quickly; Complaints: poor cleanliness and not very friendly drivers. Towncar/limos - Compliments: very clean and very friendly drivers, always on time; no complaints
Some Taxi drivers are rude and don't help guest with the bags. Drivers need to at least get out and help guest with bags.
If a guest wants to go to a local venue and not the airport some Taxis are known to say no to the local venue fare.
Dirty, rude taxi drivers. Taxis in poor condition.
Taxis are expensive, not clean; drivers do not know how to find our Inn. This is the number one complaint about taxi drivers; they do not know how to find anything out of the basic tourist stops. If it is not the airport or a downtown hotel or the market forget it. They call the Inn for directions and are rude to us when we assist. They are rude when they show up and it takes a guest a few minutes to get down our stairs with luggage. They offer NO help with luggage. Frankly, personally I do everything I can to avoid taking a taxi in Seattle. I have to have them available for guests. WE are going to investigate use of Flat rate as an alternative. We recommend town car service to the airport for our guests. Part of the problem is that Seattle wants to be a big city with few cars, and lots of public transportation, frankly this only works if you have a good taxi network to back it up. Why do you think there are all these alternatives popping up, because there is not enough good working taxis that you can hail from the street, especially outside of the downtown area. Tried to find a cab in Ballard after a dinner out lately. If you were in Chicago there would be some circling the blocks on a regular basis. Taxis do need to be regulated and safe. We do not condone the use of businesses that do not meet city codes and regulations, hence while we find the service minimal we only use licensed and regulated taxi service for our guests.
People occasionally balk at the price of a drive to the airport, downtown, or other destinations outside of Eastside boundaries. No major complaints aside from excessive wait times.
Usually guests are very happy. Have had isolated incidents with taxi drivers and guests not feeling comfortable with them, hotel staff has been able to assist. I have found that one company (management) is very responsive to my complaints and concerns, have had struggles with other companies
Taxis: driving guests out of the way to increase fare (extremely common), arriving late or not at all, unwillingness to pick up passengers only going short distances (extremely common), general availability, drivers not speaking English, drivers not knowing the area, rude drivers, hygiene, drivers carrying on loud phone conversations while driving (which is also illegal).
Cab drivers are extraordinarily rude. On numerous occasions, I have had to evict drivers from my property. They come in and yell at my staff and start arguments with our town car drivers in front of guests. When we have called supervisors to complain, they act like they do not care. Nothing changes. We also have cab drivers who refuse to service our hotel because of our association with a town car service. It's ridiculous.
They change the fare once they get to their destination. Some of the drivers are rude and the take them on a long drive through the city, even though the destination is a few blocks away.

What compliments or complaints do you receive from your customers about taxi, for-hire vehicle, and limousine/town car service? ***Response Text – Hotels*** Taxi, they are often rude drivers or poor personal hygiene and often take long time to arrive. Taxi drivers are often times rude to our staff about pick up, and have no consideration for the business on several occasions they will honk at any time of the day/night if someone is in their way in our parking area. For hires are very pleasant to the guests, often need help with directions, but offer a very fair price. Town car service is by far our preferred source. The drivers are always professional to the guest and the staff, their vehicles are in better shape and the personal appearance of the car and driver are 100% better than the taxi and for hire drivers.
varies greatly: not many compliments, driver courtesy/appearance occasionally negatively mentioned (few times a month), aggressive driving also gets mentioned
Taxis - Terrible Town cars/Limousine - Great

What compliments or complaints do you receive from your customers about taxi, for-hire vehicle, and limousine/town car service? ***Response Text – Hospitals & Medical Facilities***
We receive a significant portion of complaints related to: 1. Driver behavior (not courteous, rude, etc.); 2. Unsafe driving; 3. No-showing clients; 4. Failure to perform door to door service. Not being on time.
TAXIS: Not eager to take Medicaid funded rides; Drivers do not wait; misrepresent client no-shows; long wait times
Sometimes some cab companies are very slow to answer the phone. The person who answers the phone acts as if he is doing me a big favor in answering the phone, a little on the negative side sometimes. And he expresses no patience, sometimes will just hang up on me.
driving too fast
The taxi drivers are sometimes rude and drive way too fast for conditions. They really don't care about the passengers. All they care about is the next fair.
I receive more complaints about the taxi services. I don't like to use Taxi's because the drivers are very aggressive, rude and pushy. I almost got ran over by one and he called me really ugly names because he was angry. The drivers have no customer services skills all they care about is getting paid.
Picking up clients at the wrong entrance of the hospital facilities.
Taxi drivers don't know area or go around the long way on purpose to charge more.
Rude drivers & dispatch, long wait times
Do not hear any from the patients. Being it may be their only transportation.
Driver couldn't take credit card
Company Z is usually on time and very reliable. Some issues with driver misconduct, i.e. driving too fast, milk the meter, etc. They are very good about responding and correcting issues.
Cabbies sometimes do not honor the charge account special pricing we have the cab company. The drivers are sometimes not courteous because the rates are lower. Sometimes we have trouble getting a cabbie to drive out of county, when we need them to do so, and we are always willing to pay.
Complaints about length of wait time for a taxi. The taxi drivers have poor communication skills and do not call out for their clients when they are in the waiting area of the hospital.
Time to dispatch; attempt to hustle a tip.

What would cause you to use taxis more for your clients? ***Response Text – Restaurants, Bars and Night Clubs***
I wouldn't. If it was my choice I would refer town car service to the guests. I am not a fan of taxis after using UBER.
Response time to calls
If they would be willing to pick up our guests/employees in a timely manner.
If guests are drinking we always suggest they get a taxi.
I use taxis when a guest asks me to call them a taxi. This is kind of an odd question.
I only use them because not all drivers are horrible.
Credit card machines and better availability during peak time.
Habit. Ease of use and cost
Better guest services when calling in for my guests. Better guest service of drivers. Better and faster credit card use for speedy departure when arriving at destination. More willingness of drivers to ALWAYS accept credit cards.
I'd recommend taxis if I was sure there would be quicker service. As it is, it can be unsafe to wait on our street at 2:00am for 40 minutes.
More consistent arrival times. patience waiting for guest to actually be ready (up to 25 minutes)
Unwanted Waiting time.
More Taxis on the road
A 5 minute load and unload area in front of the restaurant? Because we don't have one, that is mostly why we send people a block away for the line.
Availability
Commission
more availability and more courteous drivers
short runs, incentive program for the front desk agents/concierge
Affordability. Courteous drivers. Community Outreach
ease of booking/response
Ease of access like in most other cities.
affordability, easier booking,
Friendliness
Comparable service, ease of ordering and promptness as Uber.
more info from the cab companies
More courteous and patient drivers. They are NOT customer oriented.
If they were more consistent in the cleanliness of the cars, the cleanliness of the drivers, and if they were more friendly overall.
Consistency in service
Within the past 3 weeks our complaints have gotten so bad about the taxi services that we have moved to hiring "for-hire" companies. Even if the taxi is at fault, the complaints come back on the hotel.
Better customer service, not just to the guests but to the establishment.
Availability. Willingness to come to my establishment. Courtesy of the drivers - most are rude and argumentative.
Demand
More availability on weekends.

What would cause you to use taxis more for your clients? ***Response Text – Restaurants, Bars and Night Clubs***
Nothing
prompt answer from dispatch; good coverage of cars on busy nights

What would cause you to use taxis more for your clients? ***Response Text – Hotels***
Speed of service makes them preferable, but having cleaner vehicles and friendlier drivers would make us call them more often
If the cabs can be on time and be more respectful towards the guests
Cleaner, more knowledgeable drivers, being able to count on their ETA
If drivers were more courteous as well as willing to pick up guests no matter how limited the mileage is to where the guest wants to go...
Promptness
Better dress code, and better attitude
Improve service & quality.
More taxis need to be in the city/
Flat rates not metered that become outrageous in high traffic times. More knowledgeable drivers that can find places outside of downtown. Better response time. Easier to find and access to return to our inn after an evening out. We use taxis now, we are just not that happy with them.
Have more in the eastside. Only for-hire vehicles available on the eastside (Bellevue, Redmond, Kirkland, etc.)
We have actually reduced our dependence on taxis due to the issues previously mentioned. We are now booking airport rides through a private company. Or we tell them the Light Rail is the best option. Taxi companies would have to dramatically change before we recommended them.
Courteous drivers and more prompt arrivals
Promptness of arrival and less wait time
Better personal hygiene and more professional behavior to the guest and the establishment
If they were more available and the drivers were more professional

What would cause you to use taxis more for your clients? ***Response Text – Hospitals & Medical Facilities***
Cost is the main factor in using taxis. The service is appropriate for clients who are very autonomous.
Increase demands
Reliability; quicker response (we are investigating more use of for-hire vehicles to solve this problem)
If the receptionist that answers the phone was friendlier. Also if everyone, including the driver, had more patience.
Better trained drivers who are patient and customer focused. The vehicles need to be cleaner and be reliable.
Nothing would make me use taxis. If I do not have use them I won't.
Only call taxi service for clients.
Would not use taxi if have another option. Taxis have bad reputation for unfit drivers and theft.
Shorter wait times, better customer service.
It is up to the patient to use these services.
Nothing - we don't have many clients who use cabs. All our patients are seen at SCCA or UW or Children's.
Cheaper rates
Lower rates for the service. We try to use cabs to ease our patients' travel experiences, which involve going from our clinic to UW or even other places, and they are terribly sick people. We want to offer this more and more. We were thinking that a debit card service might be a good approach, where nurses call and order the service, get the rate, and charge to a card that totals everything out at end of month. This seems like it would help the taxi company as much as it would help us.
When clients cannot provide their own transportation. More affordable. Better service.
Increase in the Guaranteed Ride Home program

What would cause you to use for-hire vehicles more for your clients? ***Response Text – Restaurants, Bars and Night Clubs***
More readily available
If price was comparable and they would show up at requested time
If guests are drinking they shouldn't be driving.
I have never looked into using for-hire vehicles. So I would have to research what companies are out there. I've never had a guest ask me to call them a town car or limo. Also, guests use Uber on their own as the account is attached to their credit card.
Understanding the flat rates better before getting into the car.
If they were faster and had all around better service
A discounted rate for our guests would inspire us to promote their service more directly.
Quick service and affordability.
Haven't thought about it
Word of mouth
Same reason. No load space out front but our guests would probably prefer taxi/uber
Lack of availability of taxis
Commission
More availability
Incentive programs
Community Outreach. Monthly package options.
Ease of booking/response
A convenient smart phone paging feature that could allow staff to book quickly and have confidence that the taxi would be there shortly. An Uber type app for taxis would be superb.
Wouldn't use them
Same as above “more info from the cab companies”
A more confident method of knowing if they are legal or 'poaching'
Better pricing
Availability to reserve by phone instead of personal app
Just began using them, and our complaints have dropped dramatically.
We already do use them more; they are usually close to the same price, more reliable and friendlier. We find that any one of the flat hire companies is always available. They offer flat rates in the zip code; making the rate never an issue for the guest and their online booking tool is easy for the front desk to use. The drivers on the for hire cars are always clean in their personal appearance and the cars appearance.
Not sure. Prefer Town Car Services.
Availability
Easier to contact, clear idea on pricing.
When the wait times are too long we will call for hire cars

What would cause you to use for-hire vehicles more for your clients? ***Response Text – Hotels***
Availability.
Will not use for hire vehicles.
Flat rates, drivers who know their way around Seattle. Ones that will pick up at our neighborhood Inn. We are going to be investigating flat rate for hire as an alternative to taxis. This will not solve all the problems as long as they cannot be hired (and are not in the areas where taxis are needed) on the street. Again, we need more cabs available for last minute pickups out and about in the neighborhood restaurant areas.
Out in Issaquah we are unfamiliar with their services and rates. Our most popular request is for runs to the airport. Those services might gain business by reaching out to Issaquah area hotels.
See last question "We have actually reduced our dependence on taxis due to the issues previously mentioned. We are now booking airport rides through a private company. Or we tell them the Light Rail is the best option. Taxi companies would have to dramatically change before we recommended them."
Cheaper
More information about them
More affordable for guests, more flexibility and also upfront about charges
More availability, they are often not available when needed
Dependability in pick up times/consistent hygiene and manners/accountability to our guests, our hotel
Pricing

What would cause you to use for-hire vehicles more for your clients? ***Response Text – Hospitals & Medical Facilities***
Our experience has been that the level of customer service (driver behavior etc) has been higher with the for-hire clients. We are more inclined to use for-hire companies with clients who have a higher level of assistance needs.
Increase demands
Medicaid contract
I'd rather use these services than Taxis any day.
Do not use for-hire vehicles.
Dependability and trust of driver.
Same as above answer. “It is up to the patient to use these services.”
Cheaper rates
IF the client did not want a taxi, we would offer them something else if there were a great need to move them, and they were refusing to go. Taxis - if rates are lower - we would use more often Taxis - if a debit card system could be worked out, it would ease the whole accounting piece, and make for less mistakes with cabbies -- it would also take the pressure off the very sick patient who really is in no position to negotiate fees with a cabbie.
This is an individual choice of various administrative staff for VIP travelers.

Please list any additional comments you would like to make regarding Seattle/King County taxi, for-hire and limousine/town car services. ***Response Text – Restaurants, Bars and Night Clubs***
Personally I love UBER. The app is great and it's the most convenient and reliable way to get around.
I think Uber is the best. I recommend it to guests and friends. My colleagues and I use it frequently and I haven't had or heard of one bad experience with Uber. Seeing your vehicle in real time as it drives to pick you up is awesome! I'd rather pay a little more for their amazing service. Most of the taxi drivers in this city shouldn't have a license to drive. Most are reckless and careless in their driving skills. Cab drivers tend to complain when you give them a credit card and not cash. Some have told me they don't take cards which I know is a lie. Then they take out the credit card swiper and mutter things under their breath. Unprofessional and rude! I would be happy if the cabs were put out of business by Uber.
Once again, please perform some disciplinary actions upon Company X Cab drivers that we specifically complain about.
Please get credit card machines! That will make a HUGE difference for people easily getting out/ getting in, not blocking traffic and for the person paying to just swipe their card, hit the percentage of tip and they are out. Every other major city has them!
Please open up the market to more of the for-hire services like Uber. Their service level is superior to the existing taxis and the competition would be better for everyone, not to mention encourage people to not get behind the wheel after a night out!
I recommend Uber to my patrons for safety and reliability reasons. Uber shows up in 10 minutes tops. Cabs often show up 30 minutes after a customer has called them, waited, and given up and left, and we have to look for the customer. 80% of the time a cabbie comes in looking for someone it is someone who left a really long time ago and we worry people may be choosing to drive when it isn't safe for them to do so!
They are better than 5 years ago.
Company X cab drivers need to stick to their calls more often. Often they will pick up people from the street and not resend new taxi. All runs should be priority not just airport runs.
Our city is only going to grow, let’s have fun along the way.
Everyone who uses UBER loves it. I have never had one client say anything bad about their experience. This survey is poorly written since the client books their own ride with UBER. I don't
The recent additions to the available paid rides scene in Seattle have been sorely needed for a long time. There are not enough taxis and they are poorly maintained, non-English speaking drivers that constantly get lost. If the taxi industry disappeared tomorrow I don't think it would be missed. Uber and the like are the result of demand for better service and I hope they are successful and offer their services in Seattle for a long time to come.
We need a change!

Please list any additional comments you would like to make regarding Seattle/King County taxi, for-hire and limousine/town car services. ***Response Text – Restaurants, Bars and Night Clubs***
With my last position, I traveled approximately 25-30 weeks a year, flying out of Sea-Tac. The taxi service was so bad; my company approved its employees to use town cars, at a higher rate. The frequent guests at our hotel prefer town cars or the light rail to taxis.
More taxis
Our guests are conservative and not always comfortable with for-hire cars, but are willing to try when the wait times are too long for a cab

Please list any additional comments you would like to make regarding Seattle/King County taxi, for-hire and limousine/town car services. ***Response Text – Hotels***
Taxi drivers are not as bad as Chicago but are cleaning up their act with the competition from Uber, etc. We need a better experience for our guests. Taxis aren't making it.
Need more taxis both in downtown and at the airport, especially during peak demand periods.
Figuring out this is long overdue. And ironically this survey did not even address the LYFT and other startups that are not licensed that you find on your smart phone. Just wait till someone really gets hurt in one of those. But they started for a reason, to fill a need that exists in a city that frowns on cars, and wants more public transport use. What we need are good, reasonable priced, licensed and regulated taxis that one can feel safe using and that are accessible when needed. London cab drivers have to pass a test to show they can find their way around the city.....never had a cabbie in Chicago that did not know how to find a place in the neighborhoods from downtown. And cabs are everywhere to be found in all major cities of our size. been to San Fran lately.....
Our hotel avoids taxis if possible. They provide poor service and while the hotel has nothing to do with that issue, it falls back to us with guest complaints.
We have an agreement with one specific town car company. The other companies who know this still come to our property and try to steal fares. This causes major problems and usually they are in front of my guests. The cab companies need to address their extremely poor service, both for the drivers and for the dispatchers. It would also be nice to have more available during peak times like game weekends, concert nights, citywide events, etc. We use them a lot since we do not have a hotel shuttle.
Taxi service in the city has improved over the past few years, just needs to be more consistent with hygiene/manners. Most drivers are very good. Thanks for listening to our opinions!
Taxis and their drivers are not a good representation of our city. We need to upgrade their appearance, professionalism and integrity

Do you find response times to be significantly different during specific times of day? If yes, please explain how response time is different. ***Response Text – Restaurants, Bars and Night Clubs*** Weekends are slower
Often the taxi never shows or is very late. We have had to drive our guests to airport so they do not miss a flight.
It all depends if cabs are lined up at the Sheraton for airport rides and ignoring us.
Longer wait times
When there are events going on around town or it is raining, response time is significantly longer. Sometimes, maybe once or twice a week, we will be quotes 0-5 minutes and the car never shows up.
Can be as long as 120 minutes.
There are not enough taxis in Seattle on Friday's and Saturday's between 4pm-8pm. Waits have been up to an hour during these times.
Of course. Rush hour or bar closing times take the longest due to demand.
Longer response times when it's raining, weekends at 2am, and holidays (fewer drives).
A lot longer on the weekends
Response time is slower on the evenings and weekends. We often get a slower response time during lunch as well.
Saturday nights are hardest to predict even when dispatcher tells me the expected arrival time.
If it is raining or if there is a game at Century Link the wait can be well over an hour. Weekdays are pretty easy- weekends after 10 pm can be impossible.
Weekends are always longer reaction time
Rush hour or events
Cruise ship days are busier. As well as Friday and Saturday nights after 8pm
Sporting events, high traffic times, etc.
Called a cab at 11pm on a Saturday night, waited 20 mins. A busy night.
Closing time on weekends the wait times and response tend to be longer and less reliable
Closing time at 2am you can wait over an hour for a taxi
Weekends and evenings are busier therefore a higher demand for vehicles
Games, Rainy Days, Weekends, and Marathons, etc. Make cabs in particular pretty much impossible to find.
Weekends response time is slower
If there are any events happening at the same time, sometimes taxi's show up more than 30 minutes late or not at all
During traditional prayer times, you cannot find a taxi in the city. Guests at our hotel are left waiting or use other transportation. Certain early times and late times, they never even bother to arrive.
Weekends and evenings are significantly longer, sometimes it can take up to 15 minutes to get someone to answer the phone
We are a hotel, and on cruise ship days or sporting event day the wait can often be up to 30-45 min.
Weekend and after hours
Longer on weekends

Do you find response times to be significantly different during specific times of day? If yes, please explain how response time is different.
Response Text – Restaurants, Bars and Night Clubs

Friday and Saturday nights, or when there is a big event downtown, wait times can be as much as an hour

Response Text – Hotels
weekdays are definitely busier and so response time is slower on weekdays
Week days during the morning Cabs a always running late or stuck in traffic and so goes for the weekends. At times most cab companies tell us that they don't have drivers available in the area so we have to get other means of transportation for our guests.
Rush hour traffic or major events within the city limits can impact our times and sometimes make it impossible to get service to the hotel for pick-up.
peak travel times
The worst time is Saturday and Sunday between 10 am and1pm This is due to the demand created by the cruise ships
Longer waits during rush hours both AM and PM.
Rush hour takes much longer during the week.
During events (games downtown) wait time is more
During prayer time taxis are nowhere to be found.
much faster on weekdays during regular business hours 8am-5pm
It is next to impossible to get cab service on game days/nights or during citywide events. The cab companies pick up and hang up, have a busy signal, don't come at all, or take in excess of 45 minutes to arrive.
If it's raining the wait is about 15-30 minutes sometimes in the middle of the day it's 15-30 for no explainable reason
Often on busy days with cruise ships or sporting events the taxi cabs can take 30-45 minutes or not show up at all
Takes much longer during morning and evening Rush hour. during events it takes much longer. Football games, Baseball, Concerts, etc.

During commute hours, response time slows.
Evenings are longer wait times
I am told by staff who coordinate rights that mid-day to evening are the longest wait times.
It depends on the weather. A lot slower in the rain and very rare in the snow.
Traffic times and heavy clinic time
Rush hour wait time doubles
Friday afternoons seems the slowest.
Traffic is really backed up or the cab companies do not have enough people working or in the area.
Mid-morning and afternoon bookings are significantly delayed.
More difficult during peak periods, yes.

9.3 Questions exclusively for Hospitals and Medical Facilities

Do you book rides for clients who reside outside of King County? If, yes, how do you arrange their transportation to and from your facility?

We have contracts with multiple service providers, including taxis and for-hire entities. Depending on client's location, we will offer the ride based on a balance of availability and cost. We transport clients to medical facilities, not to our facility.
phone call
Via Hopelink or staff use broker for clients' county of residence.
I call directly. Usually Orange as they are most responsive and polite.
Hopelink
Phone
Rides are booked from points of entry into the city (e.g. bus station, ferry terminal, airport).
contact the broker from their area
Towncar
Farwest or Yellow Taxi
Not very often. Our contract with Yellow Cab is for in-county only, but sometimes we need to move a patient to another facility and it cannot be helped.

Do you use different companies for different client types (e.g.: one company for wheelchair users, another for non-wheelchair users). If yes, what factors influence your choice?

Factors include: client's mobility limitations, cost, availability of service provider (time of day, geography, fleet capacity) Scheduling, availability Self-pay or GRH Medicaid contract, availability, timeliness What time of day, if it is weekend or weekday, and ease of booking. The family's needs Needs of client. Customer service while booking ride & wait time. Farwest for employee rides home and some patient. Yellow Cab for some patient rides.