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April 2017
Executive Summary

Study Context

Transport for London – Taxi & Private Hire commissioned Steer Davies Gleave to conduct a comprehensive survey of black cab and minicab app use in London. This survey collected information about app users and non-app users and the impact of app use on their travel habits.

Methodology

1,000 black cab and minicab users in London completed an online survey during September 2016 using the Research Now panel. The sample of survey respondents was targeted at black cab and minicab users. As the sample was not representative of the London population the data was reweighted by Mosaic\(^1\) prior to analysis.

Key Findings

App User Demographics

- Generally, app users had a higher average income than non-app users. 15% of them had a household income of less than £25,000 whereas there were 27% of non-app users this income band.
- App users tended to be younger than non-app users: 70% of app users were under 44 years old, compared to just 34% of non-app users.

Black cab and Minicab Use

- In the 12 months up to October 2016 35% of app users and 22% of non-app users reported a decrease in the amount they use black cabs.
- In the 12 months up to October 2016 19% of app users and 9% of non-app users reported an increase in their use of minicabs.
- 22% of app users used a black cab at least once a week compared to 7% of non-app users.
- 25% of app users used a minicab at least once a week compared to 6% of non-app users.

App Use

- The most popular black cab app was Hailo which 31% of black cab app user respondents currently use.
- The most popular minicab app was Uber which 76% of minicab app user respondents currently use.
- Since starting to use apps, 40% of respondents reported increasing their minicab use and 28% reported a reduction in their use of black cabs.
- Since starting to use apps, a third of respondents reported decreasing their use of night buses.
- 44% of respondents reported that app use had meant that they increased the number of trips they take for leisure or entertainment purposes.
- 47% of app users reported having more than one app and the most commonly chosen reason for this was to compare prices (21%).

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\(^1\) Mosaic is a geodemographic classification which classifies individuals into groups at an individual postcode level.
• The most common issue arising from app use was the vehicle being delayed (36%); this was followed by having an issue with the driver (23%) and having a technical problem with the app (17%).

Changes since the research was undertaken

It’s worth noting that since the research was undertaken there has been a number of changes in the market – reflecting the dynamic and fast moving nature of the market:

• Karhoo is no longer operating.
• Hailo has merged with MyTaxi.
2 Introduction

Background

2.1 This report presents the results of a survey of London residents concerning their use of black cab and minicab smartphones apps which was undertaken in October 2016. This follows on from qualitative research that was carried out previously where Londoners were invited to a focus group to provide insight on their use of black cab and minicab apps.

2.2 The focus groups highlighted a number of recurring themes from which the following hypotheses were devised:

- The use of apps increases the number of trips made by people, as well as re-distributing them between modes;
- Apps can divert trips from a range of different modes;
- Customer loyalty towards apps is high and some minor issues are tolerated as long as customer service remains good;
- Loyalty to an individual app is less secure and some users have multiple apps on their phone;
- Over time, brand loyalty may become more of a factor so there are likely to be differences in behaviour depending on how long the individual has been using apps; and
- Uber, Hailo and other apps may in effect, be becoming a new category of black cab/minicab.

2.3 This report will look to see if the additional quantitative research proves or disprove these hypotheses.

This report

2.4 Following this introduction, Chapter Two describes the methodology for the survey and presents the profile of survey respondents (which is designed to reflect the population). Chapter Three then looks at travel behaviour including how often users make use of black cab and minicab services compared to other modes.

2.5 Chapter Four considers app usage with Chapter Five exploring the impact of mobile apps on respondent’s use of black cabs and minicabs.

2.6 Chapter Six offers insight into the different mobile apps, whether respondents have had an issue and if that has had an impact on their loyalty to a specific service.

2.7 Chapter Seven provides overall commentary on the findings and looks to prove or disprove the hypotheses set out above.
2.8 Please note, where it is possible to draw a distinction, findings for black cabs and minicabs are presented in their own sub-sections. The term 'app users' used in this report refers to users of apps specifically for booking either black cabs or minicabs.
3 Methodology and profile

Overview

3.1 The app use survey involved an online questionnaire that was targeted at a panel of individuals that were more likely to use black cabs, minicabs and apps. The research was undertaken during October 2016. A total sample of 1,000 respondents was obtained.

Methodology

Questionnaire

3.2 The online questionnaire was sent to participants recruited using the Research Now panel. It was designed to take respondents between 15 and 20 minutes to complete and covered the following topics:

- General usage of black cab/minicab services;
- Changes to usage of black cab/minicab services;
- Changes to usage of other transport modes;
- Awareness of black cab/minicab applications;
- Which apps they had used/stopped using;
- Issues and their resolution; and
- Awareness of ridesharing\(^2\) services.

Sampling

3.3 Profiling was undertaken using Mosaic, a geodemographic classification which classifies individuals into groups at an individual postcode level. The profiling was designed to particularly target Londoners who were existing users of black cab and minicab services. Similar Mosaic types were groups clustered together and the clusters differed in terms of their use of black cabs and minicabs, and their propensity to use black cab/minicab booking apps.

3.4 Table 3.1 below shows the breakdown of respondents based on the different Mosaic Groups. A summary of the demographics of these Mosaic Groups has been included in Appendix A for reference.

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\(^2\) Sharing a black cab or minicab with one or more individuals you don’t know e.g. UberPOOL
### Table 3.1: Mosaic profile of respondents

<table>
<thead>
<tr>
<th>Mosaic Group</th>
<th>Number</th>
<th>% of sample</th>
<th>% of London population</th>
</tr>
</thead>
<tbody>
<tr>
<td>A - City Prosperity</td>
<td>315</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>B - Prestige Positions</td>
<td>83</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>E - Senior Security</td>
<td>21</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>F - Suburban Stability</td>
<td>20</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>G - Domestic Success</td>
<td>88</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>I - Family Basics</td>
<td>14</td>
<td>1%</td>
<td>6%</td>
</tr>
<tr>
<td>K - Municipal Challenge</td>
<td>90</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>L - Vintage Value</td>
<td>3</td>
<td>&lt;1%</td>
<td>1%</td>
</tr>
<tr>
<td>N - Urban Cohesion</td>
<td>260</td>
<td>26%</td>
<td>17%</td>
</tr>
<tr>
<td>O - Rental Hubs</td>
<td>107</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>1,000</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Note: See Annex A for more detail descriptions of the different Mosaic Groups

### Weighting

3.5 All data presented in this report is weighted to reflect the Mosaic profile of the London population, as presented in Table 3.1 above.

### Profile

3.6 Respondents were asked a number of questions covering demographics and general profiling. Where there are notable differences in the profile of app users and non-app users the results are presented in detail below with a summary section for the other statistics gathered. App users are defined as individuals that responded they have used either black cab or minicab apps. Where a graph shows a sample size of 1,000, all respondents have been included.
3.7 70% of app users are under 44 years, compared to just 34% of non-app users. 32% of app users are within the 25-34 age bracket, with only 10% of non-app users. Over a quarter of all non-app users were within the 65+ category.

**Figure 3.1: What is your age?**

Sample: 1,000 respondents

3.8 Two-thirds of those who responded have used a black cab in the last 6 months (66%) — although just over a fifth haven’t used one in over a year (21%). 4% said that they hadn’t ever used a black cab.

**Figure 3.2: When was the last time you used a black cab in London?**

Sample: 1,000 respondents
3.9 90% of respondents have used a minicab in the last six months, with 7% stating that they haven’t used one in the last 12 months or ever.

**Figure 3.3: When was the last time you used a minicab in London?**

![Bar chart showing the last time respondents used a minicab in London.](chart)

**Sample:** 1,000 respondents

3.10 App users tended to have higher levels of income. 27% of non-app users had a household income of less than £25,000 whereas only 15% of app-users were in this income band.

**Figure 3.4: Which of these bands does your household income fall into (before tax)?**

![Bar chart showing the income bands of app and non-app users.](chart)
Sample: 1,000 respondents

3.11 The majority of respondents were smartphone users (92%) with a slightly larger proportion of those being iPhone users rather than Android. In terms of EU market share, as of Summer 2016, around 75% of mobile users are Android and 19% Apple.

Figure 3.5: Do you own a smartphone?

Sample: 1,000 respondents

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Some of the more general findings are shown in the Figure 3.6 below:

**Figure 3.6: General findings from the online panel survey**

- **Gender of respondents**
  - Male: 51%
  - Female: 49%
- 69% were Oyster card users (PWPI and season tickets)
- 11% used contactless to travel
- 2% of respondents are Taxicard holders
- 1 in 10 stated that they had a long standing health problem that affected mobility
- Four fifths held a valid driving licence
- Three fifths were in full-time employment
- A fifth were retired
- Two thirds currently own a car
  - This is slightly higher than the London average of 59% of households owning a vehicle

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4 Table NTS 9902, National Travel Survey 2014/15
4 Travel behaviour

Introduction

4.1 This chapter identifies the extent to which respondents are using different modes of travel to get around London, followed by a more specific focus on their usage of black cabs and minicabs.

Use of travel modes

4.2 Figure 4.3 shows how respondents use different modes for travelling in London. It shows that:

- Walk is the mode used by the largest proportion of the population: 95% including 79% of people who walk at least once week;
- Bus is the most used motorised mode with 55% of those surveyed using it at least once a week;
- 24% use black cabs at least once a month;
- 35% use minicabs at least once a month;
- 27% use black cabs very infrequently or not at all;
- 10% use minicabs very infrequently or not at all.

Figure 4.1: How often do you use each of these modes to travel around London

Sample: 1,000 respondents
Black cab

4.3 App users (this includes both black cab and minicab apps) are more likely to make black cab trips more regularly than their non-app counterparts with more than three times as many app users taking a black cab at least one day a week.

Figure 4.2: How regularly do you use black cabs?

<table>
<thead>
<tr>
<th>Non App Users</th>
<th>App Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than once a year or never</td>
<td>32%</td>
</tr>
<tr>
<td>At least once a month</td>
<td>41%</td>
</tr>
<tr>
<td>1-4 days a week</td>
<td>6%</td>
</tr>
<tr>
<td>5 or more days a week</td>
<td>1%</td>
</tr>
</tbody>
</table>

Sample: 1,000 respondents
4.4 35% of app users have reduced the amount of travel they make via black cabs, but 11% had increased their usage. Conversely, 25% of non-app users suggested that they have reduced their usage, whereas 4% said that they had increased it.

Figure 4.3: In the last 12 months have you changed the amount you travel by black cab?

Sample: 1,000 respondents
The main reason why people had either increased (+4%) or decreased (-13%) their usage of black cabs was changes to their travel habits, with app usage the second most cited reason with 11% saying this had made them decrease their black cab usage (likely to be due to use of a minicab app) and 3% suggesting this had made them increase it. 10% of respondents also suggested that a preference for walking had made them decrease their taxi usage.

Figure 4.4: You mentioned that you changed the amount you travel by black cab, why is that?

Sample: 576 respondents
Whether the users were an app or non-app user had very limited impact on their times of travel. During weekdays, app users are more likely (47%) than non-app users (41%) to travel throughout the day in a black cab. At the weekend, app users are also more likely to use them for their weekend evening travel (48% vs 45%).

Figure 4.5: Time of journey – Black Cab

Sample: 629 respondents
4.7 Although not charted, of those surveyed, two fifths of black cab users (40%) said that their journeys were a mixture of both independent travel or with their friends or colleagues. Similar numbers of black cab respondents travelled alone (28%) or with others (29%).

4.8 Just under two thirds of respondents use black cab services for entertainment trips (62%), a third for business trips (36%) and another fifth stating workplace (20%) and shopping (19%).

Figure 4.6: Select the type of trips you tend to make in black cabs

Sample: 659 respondents

Please note, respondents were allowed to select more than one response.
Over a fifth of respondents stated that they would make black cab trips more often if there were a reduction in fares (21%), with 1 in 7 suggesting fixed fares would increase their usage. 7% also suggest that they would be more likely to use black cabs if there was an app available to make a booking or an option to pay with an app.

Figure 4.7: Thinking about how often you use black cabs, select up to 3 options that would make you use them more often?

Sample: 659 respondents

*Please note, respondents were able to select up to three options.*
There is a direct correlation between app use and minicab use. Four times as many app users make a trip at least once a week compared to their non-app counterparts. Non-app users are also four times more likely to use minicabs infrequently or never.

Figure 4.8: How regularly do you use minicabs?

**Non App Users**

- Less than once a year or never: 14%
- 1-4 days a week: 6%
- At least once a month: 28%
- Less than once a month: 52%

**App Users**

- Less than once a year or never: 4%
- 1-4 days a week: 21%
- 5 or more days a week: 4%
- At least once a month: 45%

Sample: 1,000 respondents
4.11 19% of app users suggested that they had increased the amount they travel via minicab in the last 12 months, compared to 17% who said that they had reduced their usage. For non-app users, 18% said that they had reduced their overall usage, whereas 9% thought that they had increased their usage. Please note, that respondents weren’t asked to quantify the level of change.

**Figure 4.9: In the last 12 months have you changed the amount you travel by minicab?**

<table>
<thead>
<tr>
<th>Category</th>
<th>Reduced a lot</th>
<th>Reduced a little</th>
<th>No change</th>
<th>Increased a little</th>
<th>Increased a lot</th>
</tr>
</thead>
<tbody>
<tr>
<td>All respondents</td>
<td>7%</td>
<td>12%</td>
<td>62%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>App User</td>
<td>5%</td>
<td>12%</td>
<td>62%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>Non App User</td>
<td>8%</td>
<td>10%</td>
<td>73%</td>
<td>8%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Sample: 1,000 respondents
The reason cited most often for an increase in the usage of minicabs (15%) was usage of apps, although 4% suggested that this had decreased their usage. For 9% of respondents, walking was stated as reason for reducing usage. Changes to travel habits (7%) and personal circumstances (6%) were the other most common responses for an increased use of minicabs.

Figure 4.10: You mentioned that you changed the amount you travel by minicab, why is that?

Sample: 564 respondents
4.13 There were negligible differences in the times of day that non-app users will make use of minicab services compared to app users. The most marked difference is on weekend evenings, where 45% of app users make all their minicab trips, compared to 40% of non-app users.

**Figure 4.11: Time of journey – Minicabs**

![Diagram showing time of journey for minicab users.](image)

**Sample: 845 respondents**

4.14 Although not charted, minicab users are more likely to travel with other people (31%) than alone (24%), although most respondents stated that they made a mix of journeys alone or with others (43%).
Almost three fifths of respondents said that they used minicab trips for entertainment (57%) purposes, with just under a quarter stating leisure (23%) and a further fifth stating business trips (21%) and shopping (20%).

Figure 4.12: Select the type of trips you tend to make in minicabs

Sample: 889 respondents

Please note, respondents were allowed to select more than one response.
17% of respondents suggested that a reduction in fares would make them more likely to use minicab services, with 1 in 10 also selecting fixed fares. 1 in 12 stated that better driver route knowledge would also encourage them to be a more frequent user.

Figure 4.13: Thinking about how often you use minicabs, select up to 3 options that would make you use them more often?

Sample: 889 respondents

Please note, respondents were able to select up to three options.
5 App Usage

Introduction

5.1 This section looks specifically at respondents usage of black cab and minicab apps, which they use, how long they have using them and explores their perceived advantages.
Black Cab

Black cab app usage

5.2 Whilst 68% of respondents are aware of mobile applications, only 20% use them to book black cabs. Just under a third of those surveyed were unaware that black cab apps existed (32%). Hailo was the most commonly used app of the options available (31%) and the second most popular app was CabApp (28%).

5.3 Users were also asked which black cab apps they had tried and no longer use. The selection of apps for respondents to choose from was the same as above. The most popular answer was Hailo (25%). The second most popular choice was Radio Taxis (21%) followed Dial-a-Cab (18%).

5.4 When black cab app users were asked which black cab apps they had heard of but didn’t use, 40% of respondents answered Dial-a-Cab and 37% said Radio Taxis. 62% of users reported that they had not heard of Karhoo while 40% had not heard of Gett.

Figure 5.4: Which black cab apps have you heard of and which do you use?

Sample: 181 respondents
For users, the most preferred app out of all the black cab apps was Hailo (28%). The second most popular was Cab App (24%).

**Figure 5.5: Which of these apps do you prefer to use?**

Sample: 67 respondents

Most respondents were fairly new users of black cab apps with 66% having started using the booking apps within the last year. Only 15% of respondents had been using the apps for more than two years.

**Figure 5.6: When did you first start using black cab booking apps?**

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5 Hailo has since merged with MyTaxi
### 5.6

Four out of five users (82%) use apps to book black cabs with some regularity, answering either always (25%) or sometimes (58%). Only 3% of black cab app users said that they never used apps to book black cabs.

**Figure 5.7: When you want a black cab, how often do you use a black cab app?**

![Bar chart showing the frequency of using black cab apps. The chart indicates that 58% use apps sometimes, 25% use them always, 13% hardly ever, 3% never, and 1% don't know.]

Sample: 181 respondents
Advantages of app use

5.7 Benefits related to convenience were the most common responses to this question with 16% answering that it was easier to pay, 14% citing the increased availability/reduced waiting times and 13% convenience more generally. Travel costs were also important to users, with 12% stating that knowing the fare in advance and 8% stating that saving money were benefits.

Figure 5.8: What do you see as the main benefits of using a black cab app?

Sample: 181 respondents
Minicab

5.8 Over four fifths of minicab users are aware of mobile applications, but just over a third actually make use of them (36%). Just under a fifth of respondents were unaware of their existence (18%).

5.9 The minicab app users were most aware of, or used was Uber (91%). This was followed by Addison Lee (65% of respondents had used or were aware of the app).

5.10 Users were also asked which minicab apps they had tried and no longer use. The most frequently chosen app was Addison Lee (24%).

5.11 70% of users had not heard of Climate Cars while 62% had not heard of Karhoo.

Figure 5.19: Which minicab apps have you heard of and which do you use?

Sample: 320 respondents
5.12 The most popular minicab app by a large margin is Uber (78%). The second most popular is Addison Lee (14%).

Figure 4.20: Which of these do you prefer to use?

Sample: 386 respondents

5.13 82% started using the booking apps within the past two years, with just over half of the respondents stating that they started using minicab apps within the past year (56%).

Figure 4.21: When did you first start using minicab booking apps?

Sample: 339 respondents
93% of respondents use apps to book minicabs with some regularity, answering either always (42%) or sometimes (51%). Only 2% of minicab app users said that they never used apps to book minicabs.

Figure 4.22: When you want a minicab, how often do you use a minicab app?

Sample: 339 respondents

Advantages of app use

For respondents increased convenience was the most cited benefit with 16% suggesting that it was easier to pay and 15% citing it was more convenient. The price of travel was also important to users with knowledge of the fare in advance being important for 12% of respondents and 11% citing both fixed fares and saving money as benefits.

Figure 4.23: What do you see as the main benefits of using a minicab app?
Sample: 339 respondents
6 Impacts on Travel Behaviour

6.1 This section considers the impact of black cab and minicab apps on respondents’ general travel behaviours and whether they were aware of the existence of ridesharing options.

6.2 Since starting to use apps, 40% of respondents reported an increase in their use of minicabs and 16% reported an increase in their black cab use. However, 28% of users now use black cabs less than before. A third of respondents use night buses less after starting to use apps.

Figure 6.1: Since you started using apps, how have you changed your use of the following modes of transport?

Sample: 361 respondents
6.3 44% of respondents reported that app use had meant that they increased the number of trips they take for leisure or entertainment purposes (answering either increased a lot or increased a little). 54% reported that app use had no impact on the number of leisure or entertainment trips they took while only 2% reported that app use had reduced these trips.

Figure 6.2: Has your use of apps affected the overall number of trips for leisure or entertainment purposes you make in London?

Sample: 361 respondents
Taxi & Minicab Ridesharing

6.4 89% of respondents said that they had heard of ridesharing and 71% said that they had either used it or would be interested in using it. Just over a quarter (28%) of respondents said that they were not interested in ridesharing.

Figure 6.3: Are you aware of ridesharing with people you don’t know?

Sample: 166 respondents
7 App Satisfaction

Introduction
7.1 This chapter looks at satisfaction to explore if respondents had more than one app installed and also if they have ever had any problems, how did they go about resolving them.

Number of Apps
7.2 Just over half of respondents (53%) stated that they had a single black cab or minicab app installed on their device, a quarter (26%) having two installed just over a fifth (21%) installing at least 3 different apps.

Figure 7.1: How many apps do you use?

Sample: 373 respondents
For respondents, comparing prices was the main reason for using more than one app (21%), closely followed by providing better vehicle availability (20%). Different apps for different locations and journey types were the next most common responses (18% and 16% respectively).

Figure 7.2: What are the main reasons you use more than one app?

Sample: 166 respondents

Please note that respondents were able to select more than one option.
Issues and Complaints

7.4 The app that the greatest number of respondents had experienced an issue with was Uber (33%) which was closely followed by Addison Lee (27%). All other apps had far fewer problems than this. It should be noted that Uber is used by considerably more users than other minicab apps and therefore is likely to have a greater proportion of issues.

Figure 7.3: Which app did you most recently experience a problem with?

Sample: 114 respondents
The most common issue arising from app use was the vehicle being delayed (36%). The next most common problem was having an issue with the driver (23%) followed by a technical problem (17%).

**Figure 7.4: What was the nature of your most recent problem?**

Sample: 170 respondents
**Issue resolution**

7.6 Of those respondents who had had issue with their chosen application, just over half (57%) had reported it to the provider. The most common methods of contact were email (52%) and telephone (42%).

*Figure 7.5: How did you contact them?*

![Bar chart showing contact methods for issue resolution]

Sample: 56 respondents

*More than one response was allowed for this question.*
Of the 40 respondents who had contacted the provider about their problem, almost three quarters (73%) had requested a refund. The majority of those had ultimately received a refund (82%), however 16% did not.

Figure 7.6: Did you receive your refund?

62% of respondents were either very or fairly satisfied with the customer service they received, with 19% feeling fairly or very dissatisfaction. However, despite the problems, the vast majority of respondents (86%) stated that they had continued to use the app despite the problems.

Figure 7.7: Overall how satisfied were/are you with the quality of customer service?

Sample: 40 respondents

Sample: 56 respondents
8 Commentary

8.1 The purpose of this chapter is to consider the hypotheses proposed at the beginning of the report and look to see if the results either prove or disprove our understandings and assumptions from the focus groups that were undertaken in 2015.

“The use of apps increases the number of trips made by people, as well as redistributing them between modes” and “Apps can divert trips from many different modes”

8.2 35% of app users have decreased the amount they use black cabs in the last 12 months compared to 11% who have increased their black cab use.

8.3 17% of app users have decreased their use of minicabs in the last 12 months compared to 19% who have increased their used of minicabs.

8.4 The survey specifically asked users whether they felt that black cab/minicab applications had had an impact on the number of leisure and entertainment trips that they made by those particular modes. Whilst the majority of respondents (54%) didn’t feel that they had made any difference, 44% felt that it had increased (either a little or a lot).

8.5 Looking at all modes, there is evidence of redistribution of trips with 30% of respondents increasing their minicab use, 13% of respondents increasing the amount they walk, and 7% of respondents increasing the number of car journeys they make. Conversely, 26% of respondents reduced their night bus trips and 12% reduced their black cab use. There were much smaller changes on all other modes. The increase in minicab use could be due to the most commonly chosen reasons in the survey which were ease of paying (16%), convenience (14%) and knowing the fare in advance (13%).

“Customer loyalty towards apps is high and some hiccups are tolerated as long as customer service remains good”

8.6 This certainly appeared to be the case, as those respondents who had had issues with their chosen application, 86% had continued using the app. It’s also interesting to note that of those who had complained, 82% had received a partial or full refund. This might well be affected by whether they felt their complaint had been handled professionally, with almost two-thirds of those who responded to that section of the survey stating that they were either fairly or very satisfied with the customer service they received.
“Loyalty to an individual app is less secure and some users have multiple apps on their phone”

8.7 There was some evidence in support of this hypothesis from the survey data. 47% of those who responded suggested that they had at least two apps installed on their devices – 7% said that they have 5 or more. When asked why they had more than one installed, over a fifth said it was because they wanted to compare prices, whilst a further fifth suggested it was to improve the availability to travel when required. What was unclear from the research, was of the apps they had installed, how many did they use on a regular basis i.e. do they use one almost exclusively and have the others as a back-up.

“Over time, brand loyalty may become more of a factor so there are likely to be differences in behaviour depending on how long the individual has been using apps”

8.8 Respondents were asked how long they had been using applications for and the profiles for black cab and minicab are somewhat different for this question. For black cabs, 38% had started using apps within the last three month, compared to 22% of minicab app users. 43% of minicab app users have been using them for a least a year, compared to just 34% of black cab app users.

8.9 There was little evidence to suggest that this particular hypothesis is correct. Uber is the most dominant player in the market, even though Hailo and Gett were both around sometime before.

8.10 It seems more likely that people are attracted to a particular provider because of the service and pricing offered rather than brand loyalty. Respondents were asked about what they felt were the main advantages of applications and for both markets, the most popular themes were convenience and matters related to payment (easier to pay, knowing fare in advance etc.).

8.11 When respondents were asked why they had multiple applications installed, 12% said it was because of promotions and offer codes – some evidence that perhaps loyalty or at least trying a different service can be bought.

“Uber (possibly, but not necessarily) and other apps are, in effect, becoming a new category of black cab/minicab”

8.12 The results from this survey neither proves nor disproves this particular hypothesis, but more anecdotal evidence might suggest this is becoming the case, with “Uber” in particular becoming part of the vernacular in its own right.

6 Uber launched in London in 2012, while Hailo and Gett (formerly GetTaxi) both launched in 2011.
## APPENDIX A Description of Mosaic Groups

### Mosaic UK

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>A</strong></td>
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<td>New Foundations</td>
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<td>H06</td>
<td>Flying Solo</td>
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*steer davies gleave*
Mosaic UK
Group overview

**Family Builders**

- **L35 Solid Economy**
  - Stable families with children renting better quality homes from social landlords.

- **L37 Budget Generations**
  - Families supporting both adult and younger children where expenditure can exceed income.

- **L38 Childcare Squeeze**
  - Younger families with children who own a budget home and are striving to cover all expenses.

- **L30 Families with Nooks**
  - Families with many children living in areas of high deprivation and who need support.

**Transitional Renters**

- **J40 Made to Move On**
  - Yet to settle younger singles and couples making interim homes in low cost properties.

- **J41 Disconnected Youth**
  - Young people endeavouring to gain employment footholds while renting cheap flats and terraces.

- **J42 Middle Stepper**
  - Maturing singles in employment who are renting short term affordable homes.

- **J43 Renting a Room**
  - Transient renters of low cost accommodation often within subsidized older properties.

**Urban Cohabition**

- **K44 Inner City Stalwarts**
  - Long-term renters of inner city social flats who have witnessed many changes.

- **K46 Created Kalidescope**
  - Multi-cultural households with children renting social flats in ever-crowded conditions.

- **K48 High Rise Residers**
  - Renters of social flats in high rise blocks where levels of need are significant.

- **K47 Streetwise Singles**
  - Hand-picked singles in low cost social flats searching for opportunities.

- **K48 Low Income Workers**
  - Older social renters settled in low value homes in communities where employment is harder to find.

**Municipal Challenge**

- **L40 Dependent Grays**
  - Ageing social renters with high levels of need in centrally located developments of small units.

- **L50 Pocket Pensions**
  - Penny wise elderly singles renting in developments of compact social homes.

- **L51 Aged Elderly**
  - Supported elders in special need accommodation including retirement homes and complexes of small homes.

- **L52 Estate Veterans**
  - Longstanding elderly tenants of social homes who have seen neighbours change to a mix of owners and renters.

- **L53 Seasoned Survivors**
  - Deep-rooted single elderly owners of low value properties whose modest home equity provides some security.

**Modest Traditions**

- **M04 Downsizing Owners**
  - Aging couple who have owned their inexpensive home for many years while working in routine jobs.

- **M05 Offspring Overspill**
  - Lower income owners whose adult children are still striving to gain independence.

- **M06 Self Supporters**
  - Hard-working mature singles who own budget terraces manageable within their modest wage.

**Urban Cohabitants**

- **N57 Community Elders**
  - Established older households owning city homes in diverse neighbourhoods.

- **N58 Cultural Content**
  - Thrice families with good incomes in multi-cultural urban communities.

- **N59 Asian Heritage**
  - Large extended families in neighborhoods with a strong South Asian tradition.

- **N60 Aging Access**
  - Older residents owning small inner suburban properties with good access to amenities.

**Racial Hubs**

- **O51 Career Builders**
  - Motivated singles and couples in their late 20s progressing in their field of work from commutable properties.

- **O52 Central Pulse**
  - Entertainment-seeking younger professionals renting city centre flats in vibrant locations close to jobs and nightlife.

- **O53 Flexible Workforce**
  - Self-starting young renters ready to move to follow worthwhile incomes from service sector jobs.

- **O54 Bus Route Renters**
  - Single renters renting affordable private flats away from central amenities and often on main roads.

- **O55 Learners & Earmarks**
  - Inhabitants of the university towns where students and older residents live in cosmopolitan locations.

- **O56 Student Scene**
  - Students living in high density accommodation close to universities and educational centres.
## CONTROL INFORMATION

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