

**Private Hire  
Vehicle strategy**

**09001**

**May 2009**



## CONTENTS

<b>1. Executive Summary</b>	<b>2</b>
<b>2. Conclusions</b>	<b>3</b>
<b>3. Research Overview</b>	<b>3</b>
3.1 Objectives	4
<b>4. Research findings</b>	<b>5</b>
4.1 Usage of minicabs in London	5
4.2 Reasons for travel by minicab	7
4.3 Time of day for minicab usage	8
4.4 Day of the week for minicab usage	10
4.5 Distance travelled by minicab	12
4.6 Overall perception of value for money	13
<b>5. Questionnaire</b>	<b>15</b>

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Research conducted by Synovate

## 1. Executive Summary

- Approximately 2 in 5 (44%) Londoners have **ever** used a minicab.
  - Eight percent use a minicab at least once a week and 25% use a minicab at least once a month.
- Minicab users are more likely to be younger Londoners and aged between 16-34 years (93%). As well as this, slightly more users live within Inner London (89%) and belong to the highest AB social grade (91%).
- The biggest reason for using a minicab rather than another mode of transport is the *ease and convenience* that it offers (40%).
- Reasons for using a minicab differ significantly by gender. Whereas women are more likely to worry about their personal safety (7% vs. 1%) and health factors (6% vs. 2%), men, on the other hand, are significantly more likely to be motivated by the lower cost of a minicab compared to a black cab.
- Nearly half (45%) of all users take a minicab late at night or during the early hours of the morning.
- Men are more likely to travel longer distances of 10 miles or more (50% vs. 27%) whereas women are significantly more likely to travel shorter distances of 1 mile or less (17% vs. 6%).
- Approximately 1 in 10 Londoners (13%) consider minicabs to be '*very good*' value for money. This perception is significantly higher amongst those aged 65 years+ (27%), the disabled (22% vs. 12%), those of DE social grade (20%) and those who have lived in London for more than 5 years (14% vs. 3%).
- Two thirds of Londoners who use minicabs (66%) consider them to be at least fairly good value for money.
- Fourteen percent of Londoners consider minicabs to be '*fairly or very bad*' value for money. This is a significantly more commonly held view amongst two of the frequent user groups – those aged 25-34 (23%) and those of AB social grade (22%).

## 2. Conclusions

Minicabs are plainly meeting the needs of a significant minority of Londoners.

Nine in twenty Londoners are minicab users. Of these, two thirds consider them to be (very or fairly) good value for money, whilst one in seven considers them to offer (very or fairly) poor value for money.

The ease and convenience that minicabs offer is the dominant reason for their selection as a transport mode. This fits with the fact that nine in twenty minicab journeys are taken late at night or during the early hours of the morning which, in turn, fits with the younger, more affluent profile of minicab users.

## 3. Research Overview

TfL is interested in gaining the view of adults who travel by minicab in London.

A short module of questions was included on the Synovate Regular Research Slot (RRS) in April 2009. This is a regular telephone survey to which modules of questions can be added as required. The questions centred on the usage and attitudes of Londoners towards minicabs.

A total of 1,005 telephone interviews were conducted with London residents. The fieldwork period was April 6<sup>th</sup>-30<sup>th</sup> inclusive. Small corrective weights were applied to the data to ensure that it was representative of Londoners.

## **3.1 Objectives**

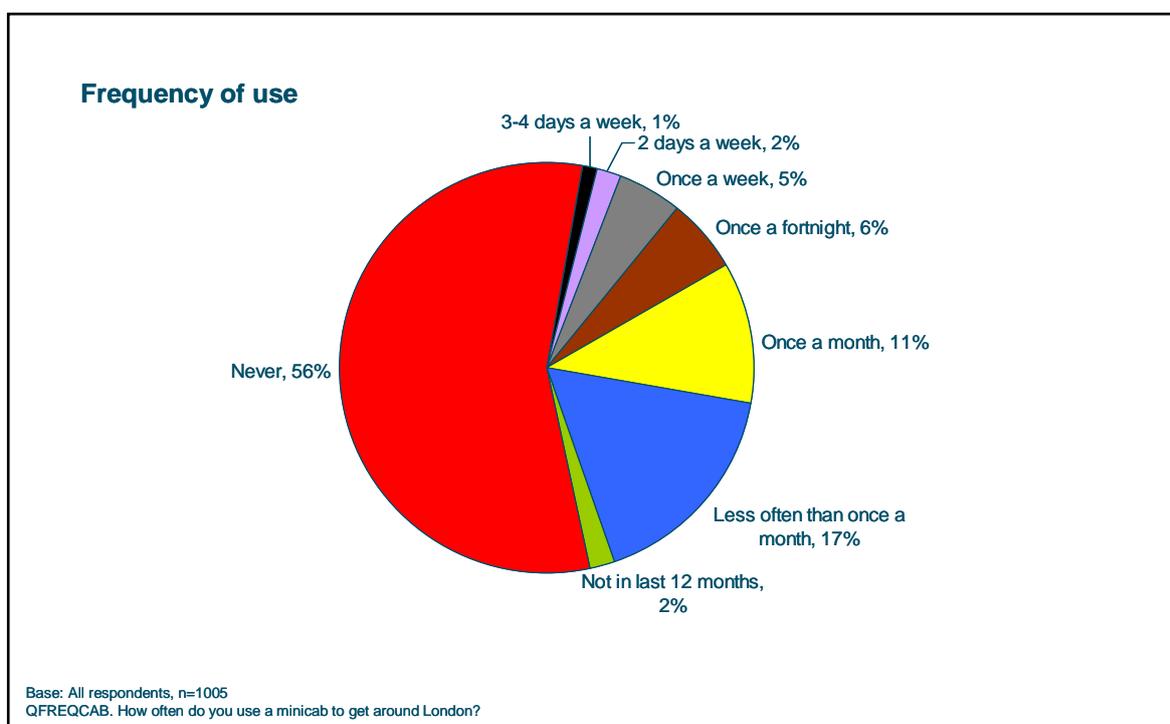
The specific objectives of the research project are to measure:

- Frequency of using a minicab to travel around London
- Reasons for using a minicab rather than other modes of transport
- Period of day and time for which minicabs are most frequently used
- Distance typically travelled by minicab
- Overall perception of value for money from minicabs

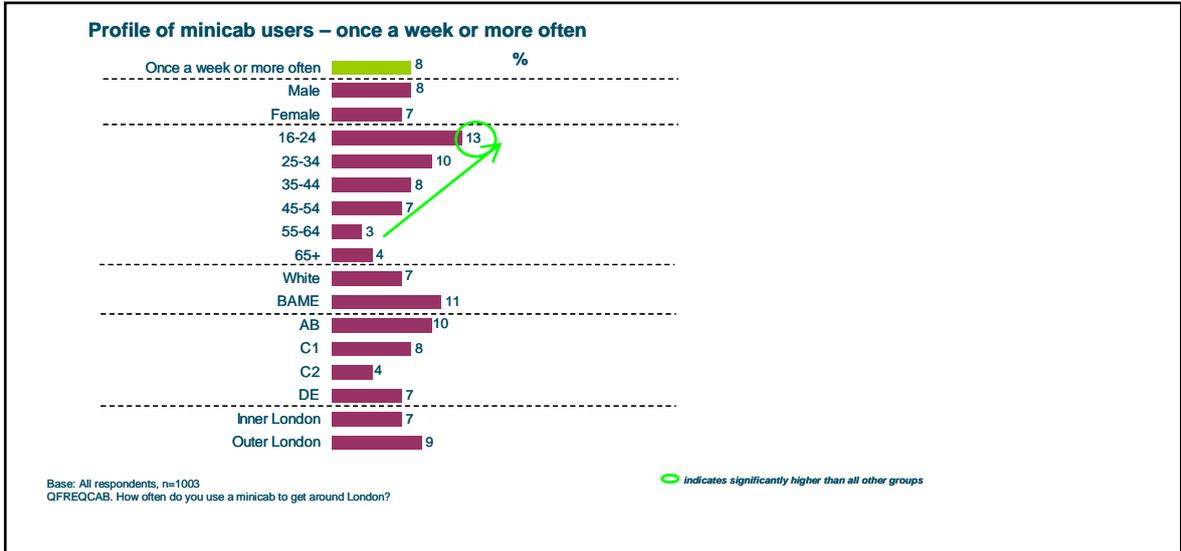
## 4. Research findings

### 4.1 Usage of minicabs in London

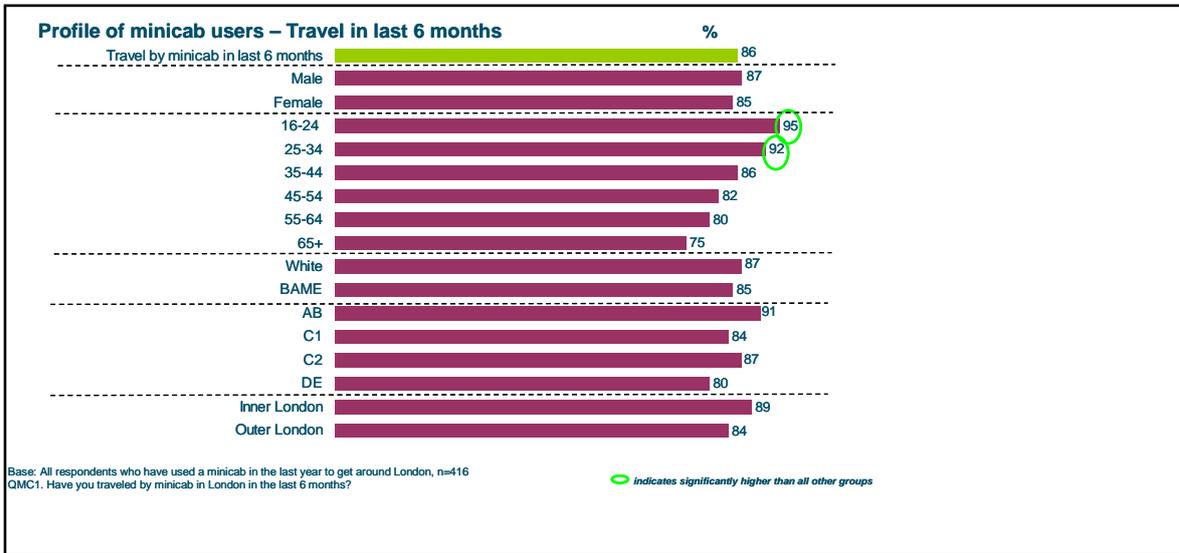
Approximately 2 in 5 Londoners (44%) have ever used a minicab. Eight percent use a minicab at least once a week and 1 in 4 (25%) use a minicab at least once a month. Approximately 3 in 5 (56%) Londoners have never used a minicab.



Minicab usage appears correlated with age; the younger the Londoner, the more likely they are to use a minicab. Indeed, 1 in 4 (23%) Londoners aged between 16 and 34 years old uses a minicab at least once a week. This compares with 14% of Londoners aged 45 years+.



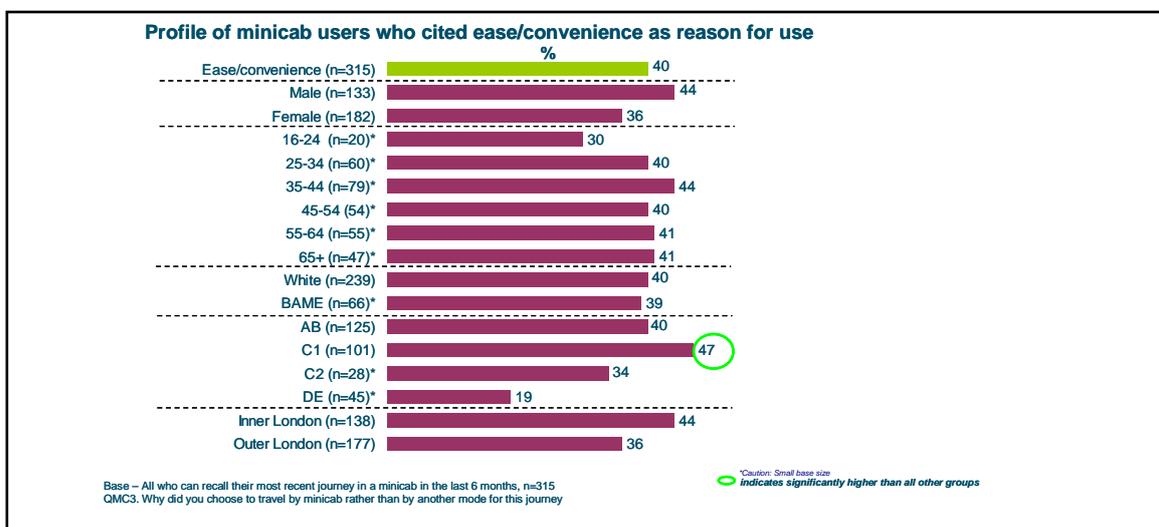
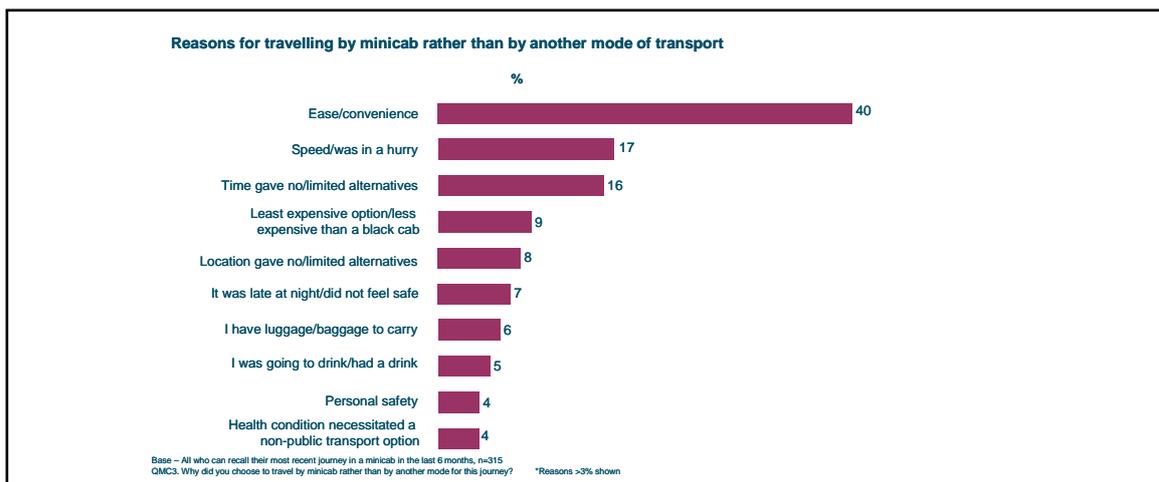
**Eighty six percent** of minicab users say that they have used a minicab within the last 6 months. Again, a significant proportion of these individuals are aged between 16-34 years (93% vs. 86% for the total sample). As well as this, slightly more users live within Inner London (89%) and belong to the highest AB social grade (91%).



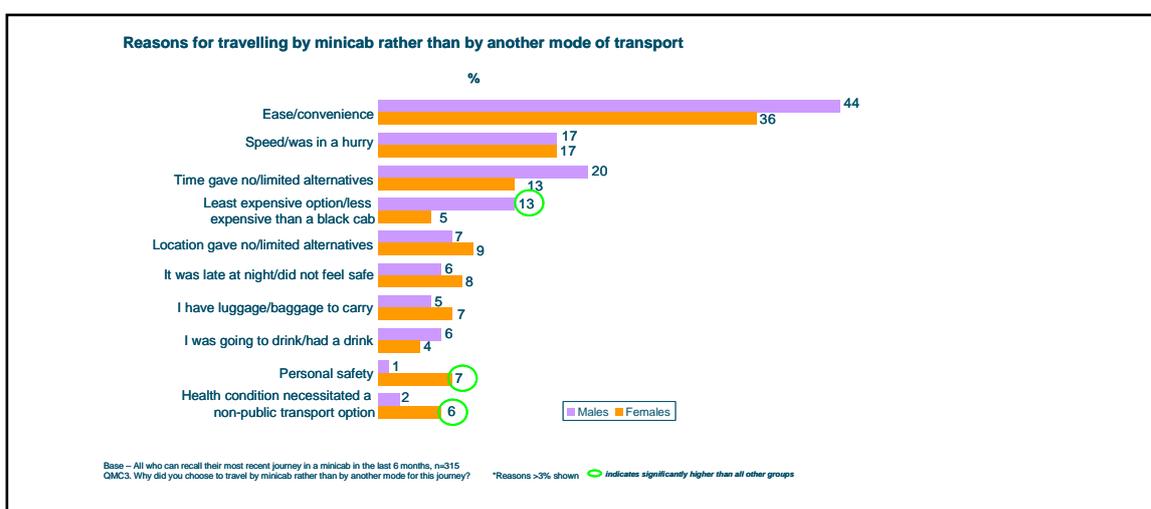
## 4.2 Reasons for travel by minicab

By far the biggest reason for travelling by minicab rather than by another mode of transport is the *ease and convenience* that it offers (40%). This appears to be a more important motivation for men (44% vs. 36%), Inner London residents (44% vs. 36%) and significantly, those belonging to C1 social grade (47%).

Other top reasons for using a minicab relate to speed/being in a hurry (17%) and a lack of time to consider alternative options (16%).



Reasons for using a minicab differ significantly by gender. Whereas women are significantly more likely to worry about their personal safety (7% vs. 1%) and health factors (6% vs. 2%), men, on the other hand, are significantly more likely to be motivated by the lower cost of a minicab compared to a black cab.



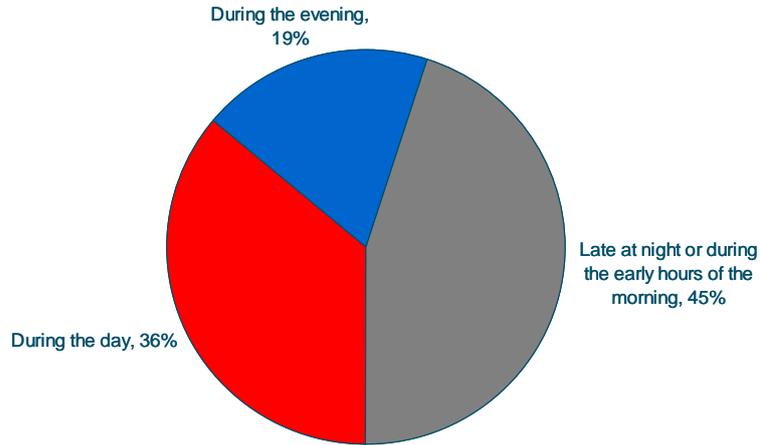
### 4.3 Time of day for minicab usage

Nearly half (45%) of all users take a minicab late at night or during the early hours of the morning. Presumably due to their lifestyle, those aged 16-34 years are significantly more likely to do this (59%) than other age groups. Men are more likely than women to travel very late at night/early morning by minicab (48% vs. 41%) as are those of AB social grade (56%).

Women are significantly more likely to take a minicab during the evening (24% vs. 13%), perhaps due to safety issues. Those belonging to C2 social grade are also significantly more likely to do this (36%).

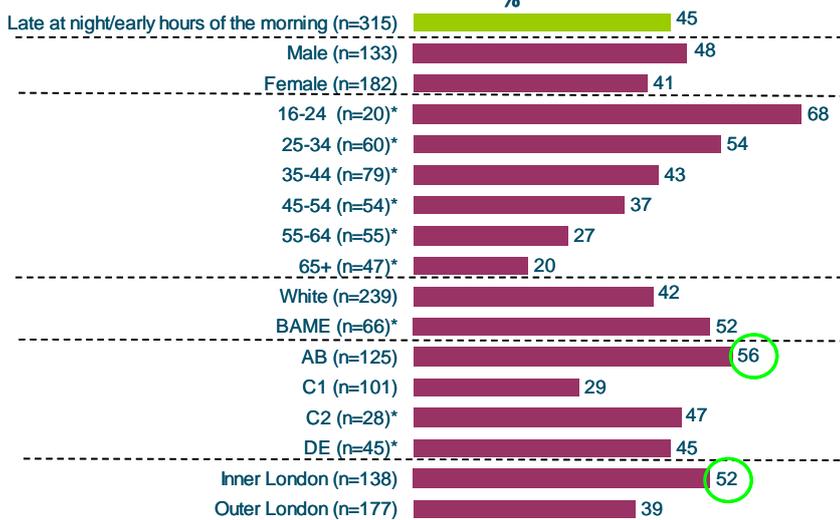
Those aged 65 years+ are significantly more likely to take a minicab during the day (61%). This is also significantly higher amongst Londoners belonging to C1 social group (55%).

### Time of day for most recent journey



Base: All respondents who could recall their most recent journey in a minicab in the last 6 months, n=315  
 QMC4. Was this most recent minicab journey....

### Profile of those who have recently used a minicab 'late at night/during early hours of the morning'

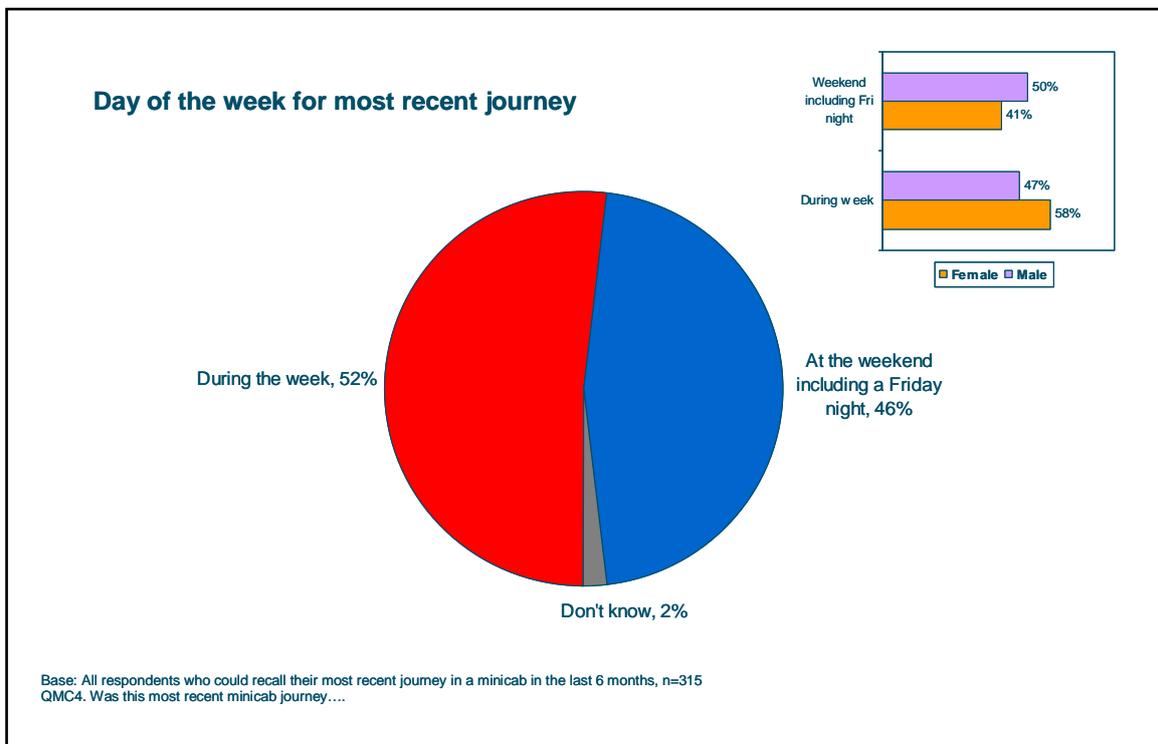


Base: All respondents who could recall their most recent journey in a minicab in the last 6 months, n=315  
 QMC4. Was this most recent minicab journey...late at night or during the early hours of the morning

\*Caution: Small base size  
 ○ indicates significantly higher than all other groups

#### 4.4 Day of the week for minicab usage

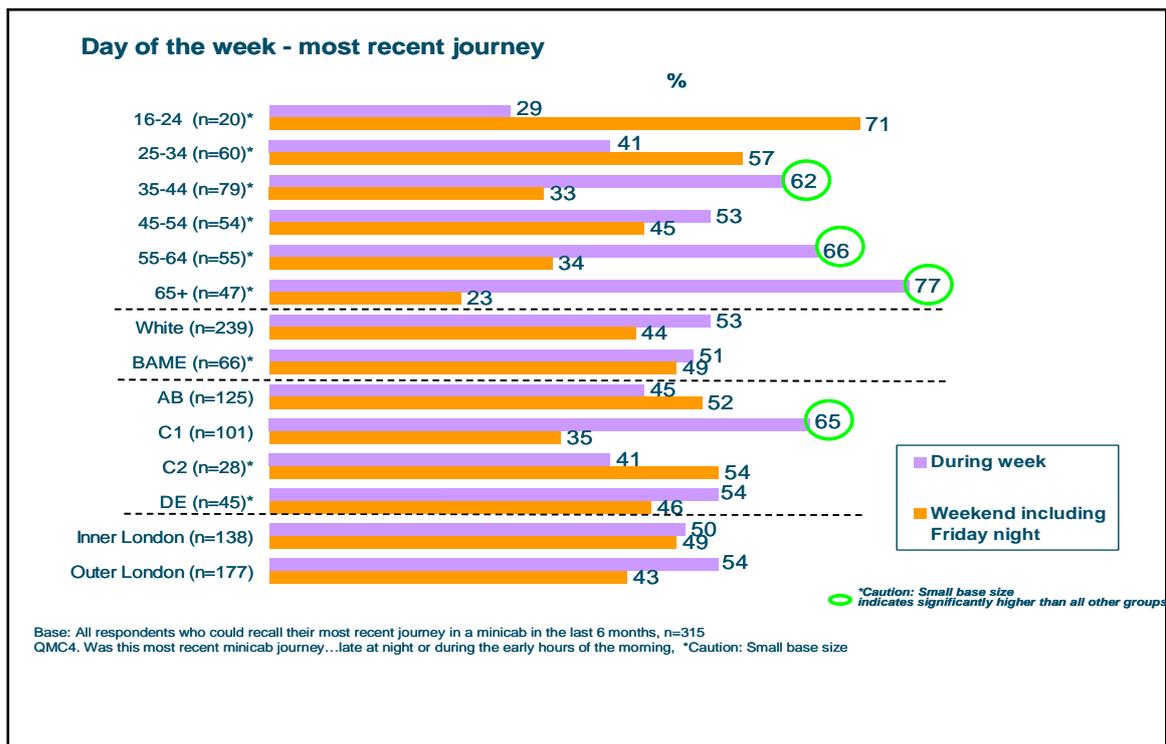
Minicabs are used more often during the week (52%) than on the weekend (including Friday nights) (46%). Whilst women are more likely to use a minicab during the week (58% vs. 41% on the weekend), men exhibit the opposite behaviour and are slightly more likely to take a minicab on the weekend (50% vs. 47% during the week).



There are clear differences by age; those aged 34 years or younger are more likely to use a minicab on the weekend while those aged 35 years+ are more likely to use a minicab during the week.

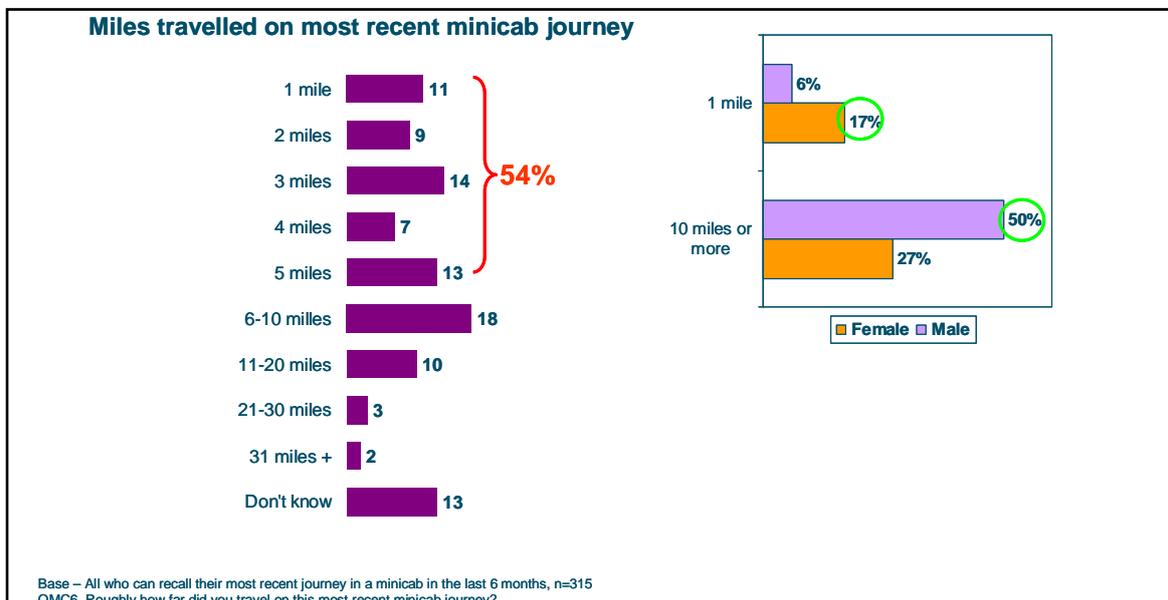
Inner London residents are more likely to take a minicab on the weekend compared to outer London residents (49% vs. 43%).

Londoners belonging to C1 social grade are also significantly more likely to take a minicab during the week (65%).



## 4.5 Distance travelled by minicab

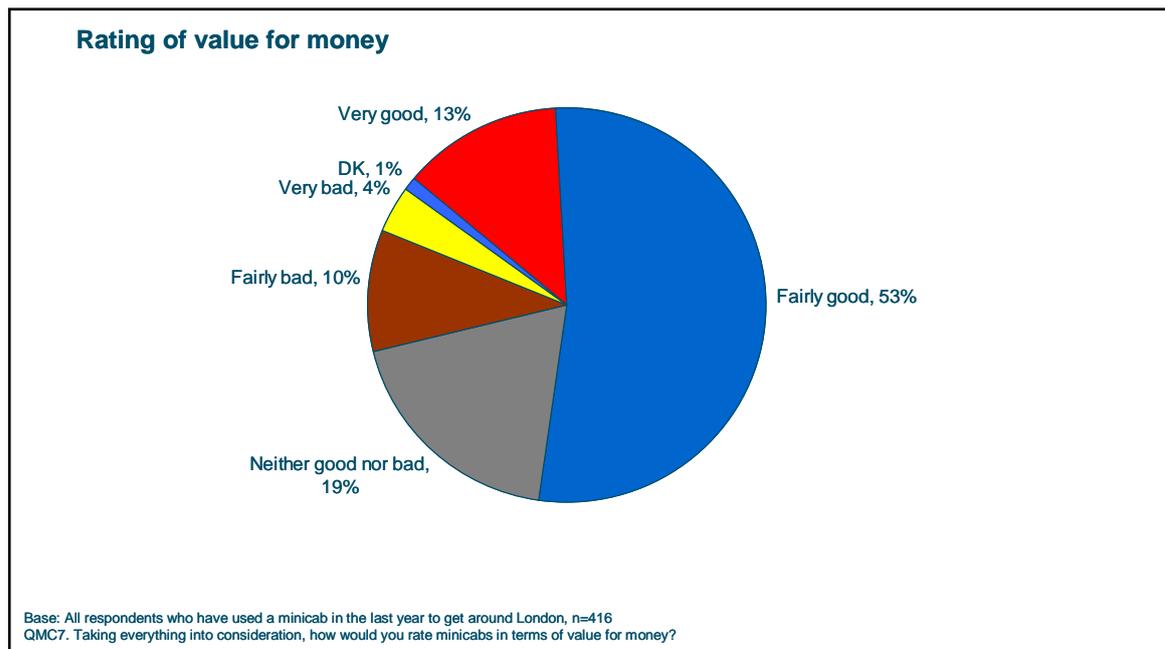
Over half of users (54%) travel short distances of 5 miles or less in a minicab. Indeed, 11% of users travelled only 1 mile (approximately) on their most recent journey.

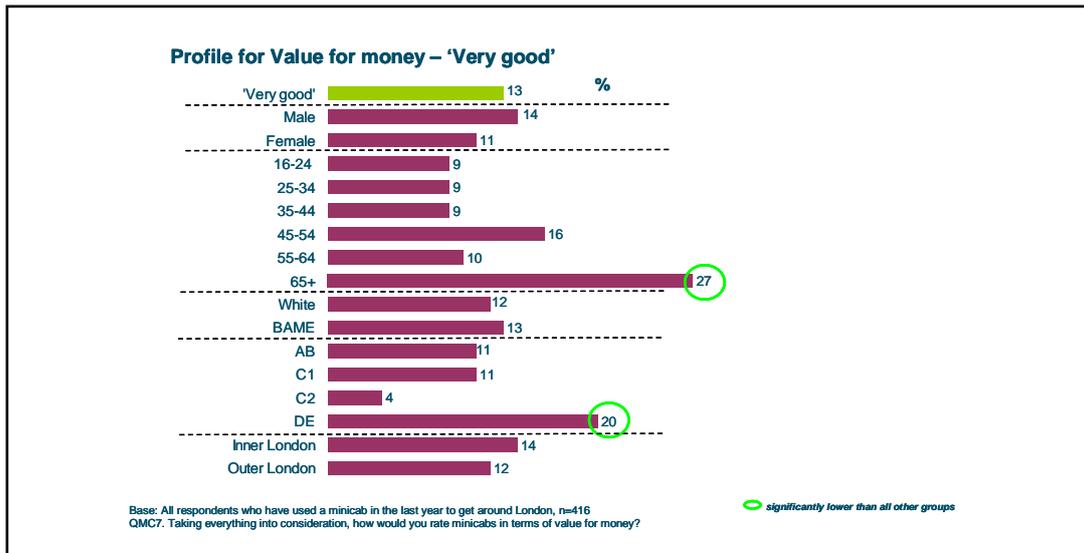


Men are more likely to travel longer distances than women in a minicab. For instance, 50% of men travelled 10 miles or more on their last journey versus 27% for women. Conversely, women are significantly more likely to travel shorter distances of 1 mile or less (17% vs. 6%).

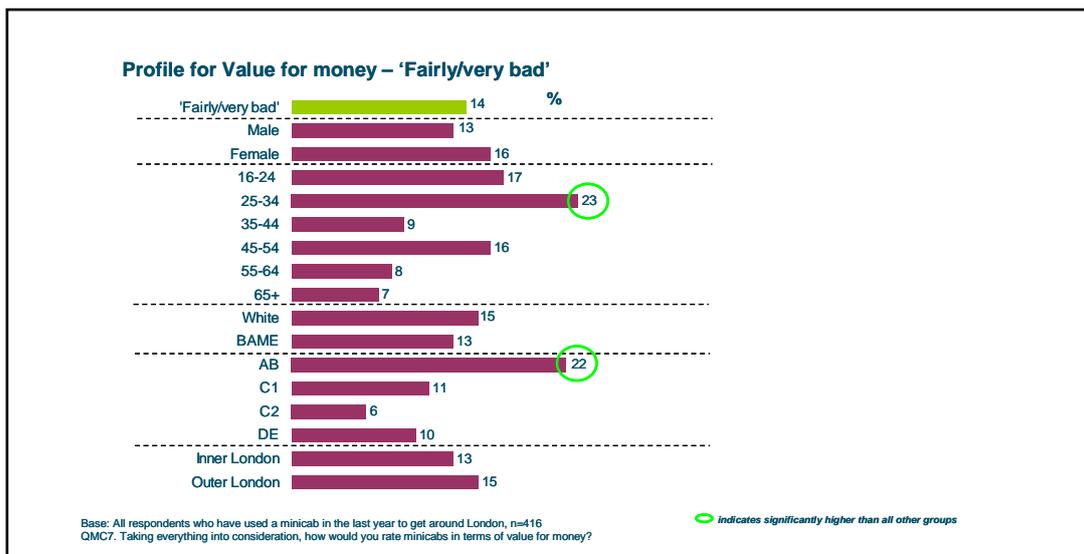
## 4.6 Overall perception of value for money

Two thirds of Londoners (66%) consider minicabs to be at least fairly good value for money. Approximately 1 in 10 Londoners (13%) consider minicabs to be 'very good' value for money. This perception is significantly higher amongst those aged 65 years or more (27%), the disabled (22% vs. 12%), those belonging to the lowest social grade (DE – 20%) and lastly, those who have lived in London for more than 5 years (14% vs. 3%).





Fourteen percent of Londoners consider minicabs to be 'fairly or very bad' value for money. This point of view is significantly more likely to have been expressed by two of the most frequent user groups – those aged 25-34 and those of AB social grade (22%)



## 5. Questionnaire

The minicab section is only to be put to people who have used a minicab in the last year to get around London (codes 1-7 at QFREQ\_CAB ON THE CORE QUESTIONNAIRE).

### MINICAB SECTION

The following questions are about minicabs and are not about black London taxis.

**MC1 Have you travelled by minicab in London in the last six months?**

Yes – Go to MC2

No – Go to MC7

(Don't know/can't remember) – Go to MC7

**MC2 Can you recall the most recent journey you made by minicab?**

Yes – Go to MC3

No – Go to MC7

(Don't know/can't remember) – Go to MC7

**The next few questions will focus specifically on your most recent journey made by mini-cab.**

**MC3 Why did you choose to travel by minicab rather than by another mode for this journey?**

**DO NOT READ OUT OPTIONS. CODE AS MANY AS APPLY.**

For ease/convenience

For speed/was in a hurry

For personal safety

Location gave no/limited alternatives

Time gave no/limited alternatives

Health/physical condition necessitated a non-public transport option

Least expensive option available/less expensive than a black cab

No black cabs available at that time

Was unsure of how to get to destination

Other (write in)

(Don't know)

**MC4 Was this most recent minicab journey:**

**READ OUT**

**SINGLE CODE**

During the day

During the evening

Late at night or during the early hours of the morning

(Don't know)

**MC5 And was this most recent minicab journey:**

**READ OUT**

**SINGLE CODE**

During the week

At the weekend including a Friday night

(Don't know)

**MC6 Roughly how far did you travel on this most recent minicab journey?**

Interviewers can accept answers in miles or kilometres, whichever is easiest for the respondent and should note which measure the respondent used.

Miles

Kilometres

(Don't know)

**MC7 Taking everything into consideration, how would you rate minicabs in terms of value for money?**

Very good

Fairly good

Neither good nor bad

Fairly bad

Very bad

(Don't know)