

Perceptions of PHVs
De-brief
January 2016
TfL number: 15093
FT number: 1881a

V1.6

future
thinking





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- Objectives and method
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- Operator proposals
- Drivers' proposal
- Technical proposals
- Use and contact of PHVs
- Demographics

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Objectives & Method

Business Objectives

Following a Consultation in March 2015, TfL have set out a number of proposals for a second consultation for the Autumn of 2015. Following on from the Talk London survey, TfL commissioned research with a representative sample of Londoners to gauge support for the various proposals put forward

Regulations
for private
hire
operators

Regulations
for private
hire drivers

Technical
changes to
the
regulations

Method

Survey of London residents consisting of 2,628 interviews

Online Survey:



2,528

Interviews with a representative sample of Londoners aged 16+

Boost telephone survey



100

A boost telephone survey conducted with those aged over 65+ to ensure that all Londoners were well represented

Fieldwork dates:



4 Dec 15 -
4 Jan 16

Method note:

- Online and telephone data combined and corrective weights applied to London demographic profile
- Participants completing online responded to 19 proposals
- For ease of administration, participants completing the survey on the telephone responded to 10 proposals

Technical note:



Only statistically significant sub group analysis is shown in report. A green arrow denotes significantly higher and red denotes lower within subgroup

A slide on reading and understanding the PHV proposals is included in the appendices

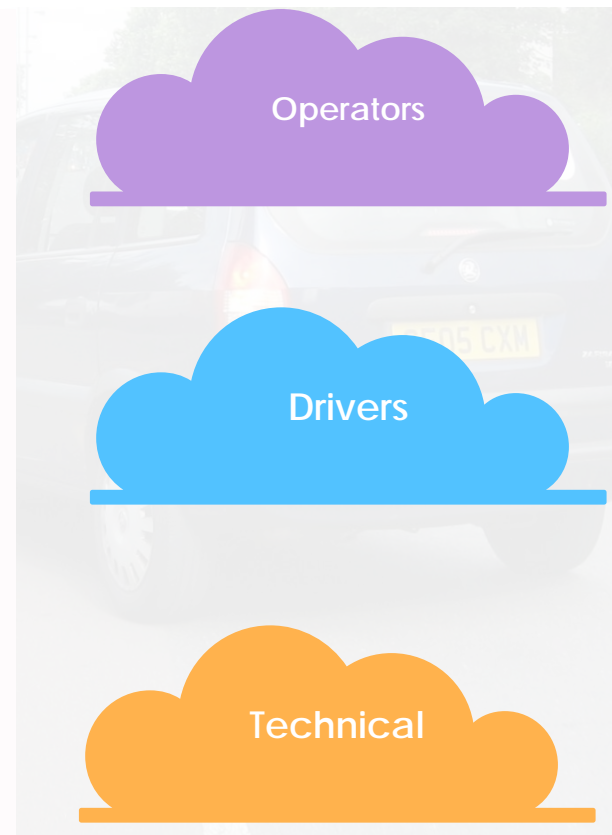


Summary



There is broad support for the PHV proposals

- Londoners tend to support proposals that have a focus on improving user experience
- Technical changes to the way PHVs operate are supported by Londoners; this may be due to the fact that these changes are perceived as measures that should already be in place
- Age is a key differentiator; with older respondents more likely to support PHV proposals than those in younger age groups
- Disabled Londoners are more likely to be supportive of proposals than those without a disability
- The method typically used to book PHVs also influences likelihood to support proposals; those who book using a landline are more supportive than those who book using apps. However, this is also linked to age



Londoners are generally receptive to the proposals for PHVs; however some are perceived more positively than others

*Denotes proposals included in both online and telephone surveys

No asterisk denotes proposal included in online survey only

*Provide **specified fare** prior to accepting booking

***Compulsory booking confirmation** with driver and vehicle information

*Record **destination and pick up point** prior to journey

Operator staff subject to **criminal records checks** as part of application process

*Appropriate **security for operators who use apps** to ensure only the driver picks up fare

***Fixed landlines** for passengers to use when vehicles are fulfilling bookings

***Five minute wait time** before journey commences to provide booking details to passenger

*Operators legally required to **offer ability to pre-book up to seven days in advance**

TfL to stop **issuing licenses** to operators that accept **bookings in/outside late night venues**

*Vehicles must **not** be shown as **available for immediate hire** in all circumstances

Drivers to demonstrate a certain **standard of spoken English**

* PHVs cannot be used for **ride sharing** unless clear controls to protect passenger & driver safety

*Private hire **drivers may only be registered to one operator** at any one time

Drivers to carry or display a **copy of insurance details**

Hire and Reward insurance checked at point of licensing and for duration of vehicle licence

Provide **driver and vehicle info to TfL** on a regular basis

Driver and Operator licence applicants to **provide NI numbers** and share with DWP

Driver's **vehicle licence automatically revoked** if driver's licence is revoked

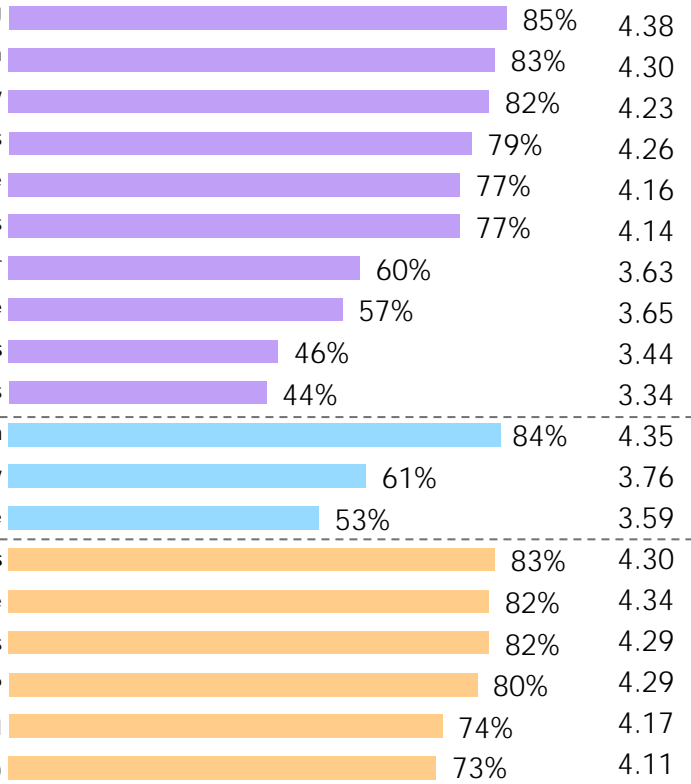
Requirement to have **Hire and Reward fleet insurance** (alternative to drivers insurance)

Mean

Operators

Drivers

Technical



To what extent do you agree or disagree with this proposal? Scale: Strongly agree (+5), Tend to agree (4), Neither agree nor disagree (3), Tend to disagree (2), Strongly disagree (1); Percentages shown represent combined Strongly agree and Tend to agree scores; All respondents (2,628), Online (2,628)

Overall, there is a degree of consistency with Talk London findings although Talk London has greater support for Technical proposals

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No asterisk denotes proposal included in online survey only

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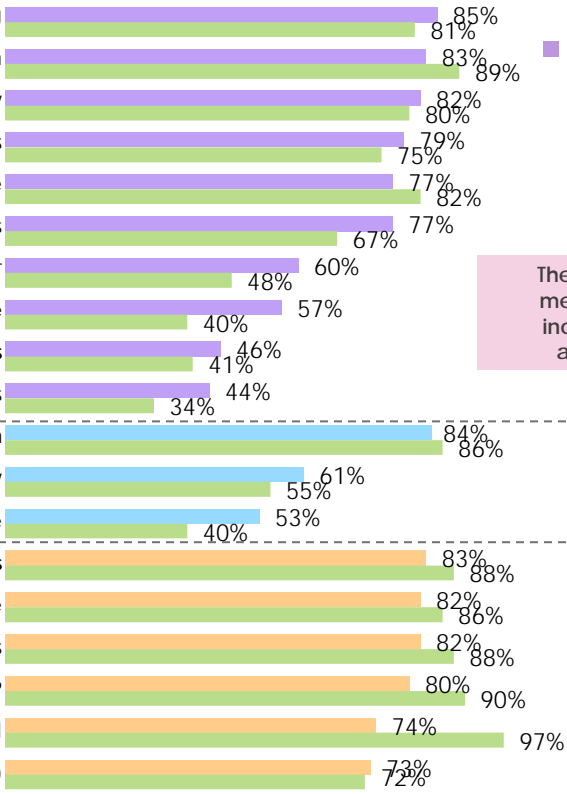
Operators

Drivers

Technical

Future Thinking
Talk London

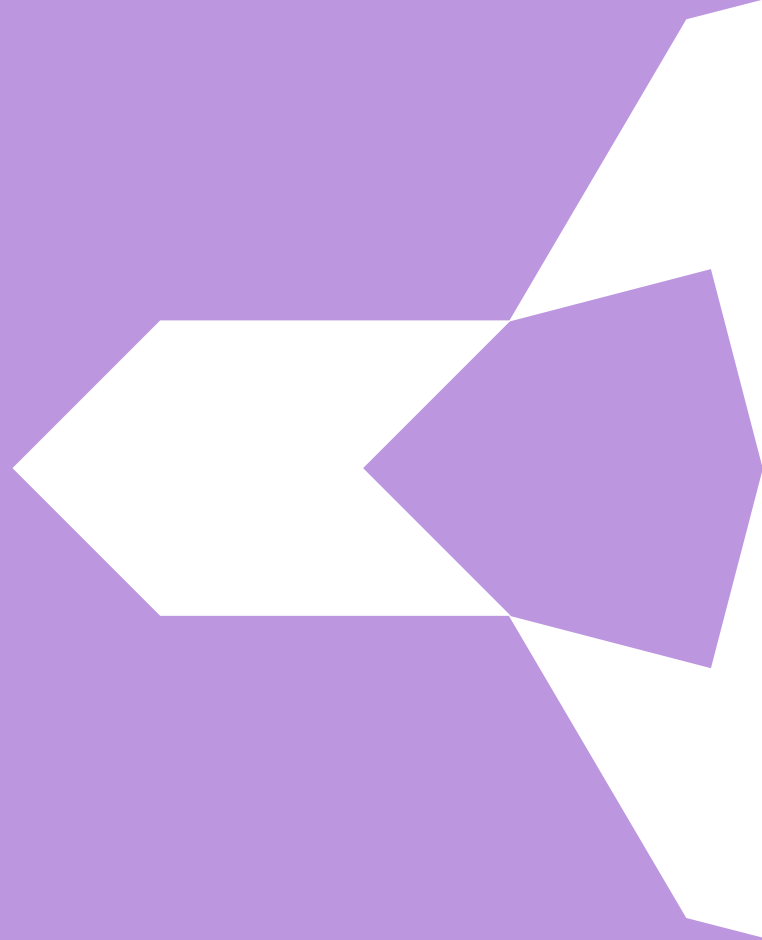
The Talk London methodology is included in the appendices



To what extent do you agree or disagree with this proposal? Scale: Strongly agree (+5), Tend to agree (4), Neither agree nor disagree (3), Tend to disagree (2), Strongly disagree (1); Percentages shown represent combined Strongly agree and Tend to agree scores. Base: FT (2,628), Online (2,628), *Talk London (869)

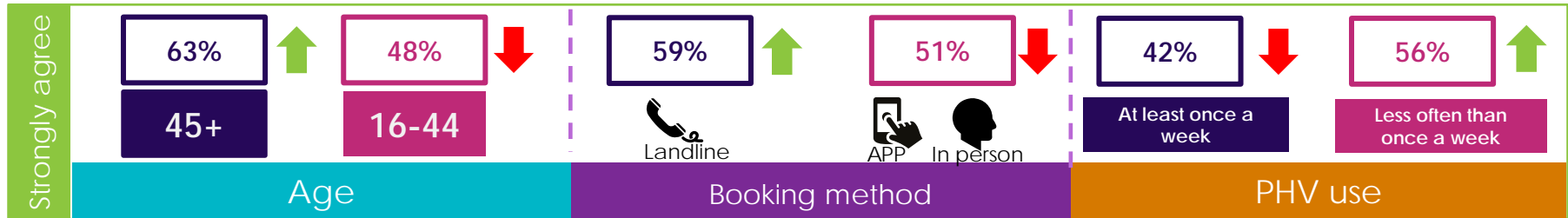
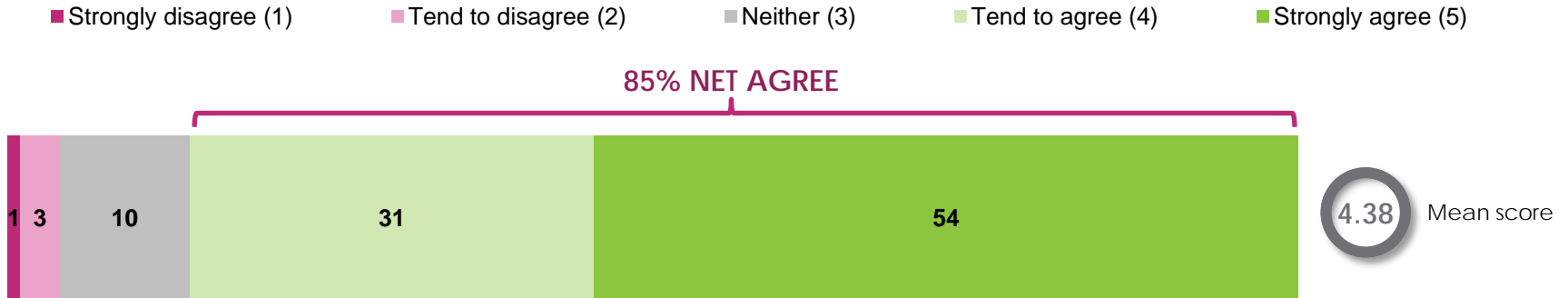


Operators



Private hire operators must provide a specified fare prior to the booking being accepted

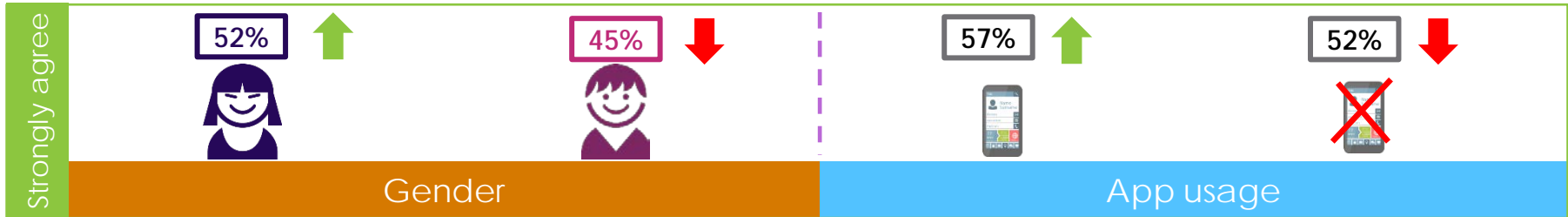
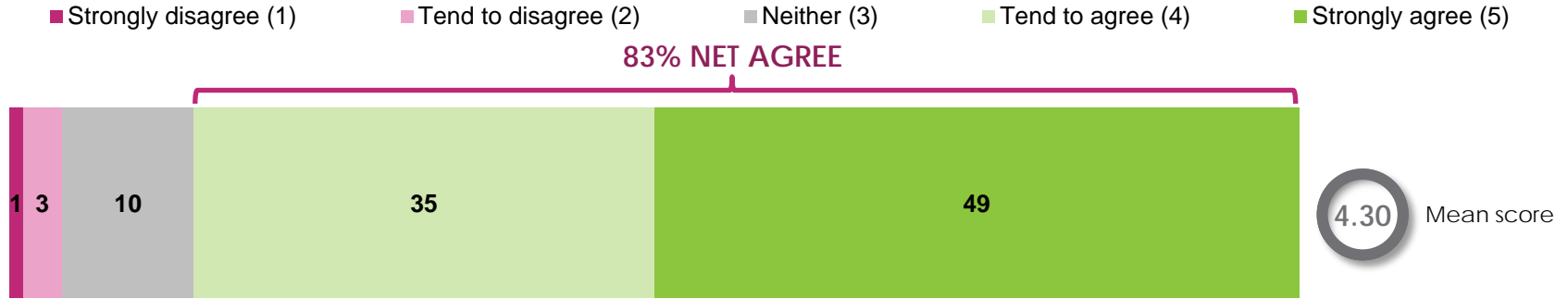
Londoners value fare transparency, this is particularly important for older Londoners



Q12. All respondents (2,628)
Online and Telephone sample

It would be compulsory for operators to provide a booking confirmation to passengers containing the driver's name and vehicle registration number. If booked via a smartphone, it would also be compulsory to provide a photograph of the driver.

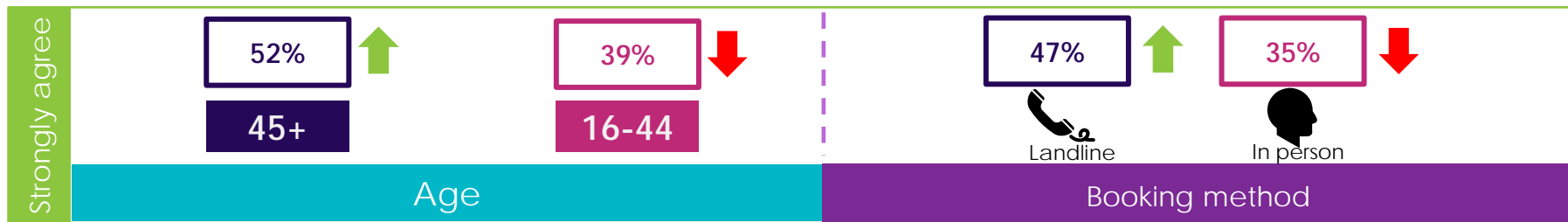
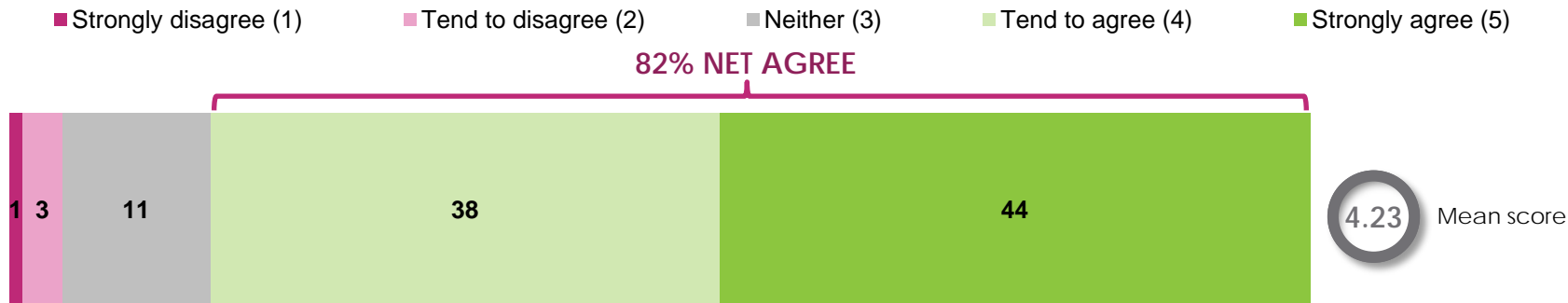
Strong sense that booking confirmation containing vehicle and driver information should be provided to passengers



Q3. All respondents (2,628)
Online and Telephone sample

Operators must record the main destination and pick-up location for each booking, at the time the booking is made and before the journey starts

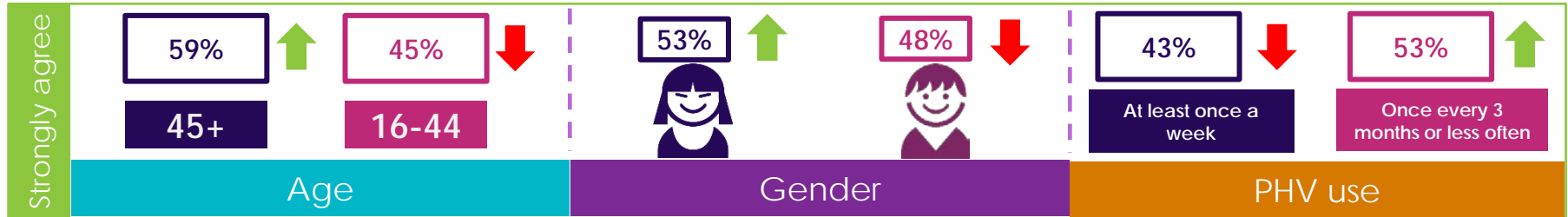
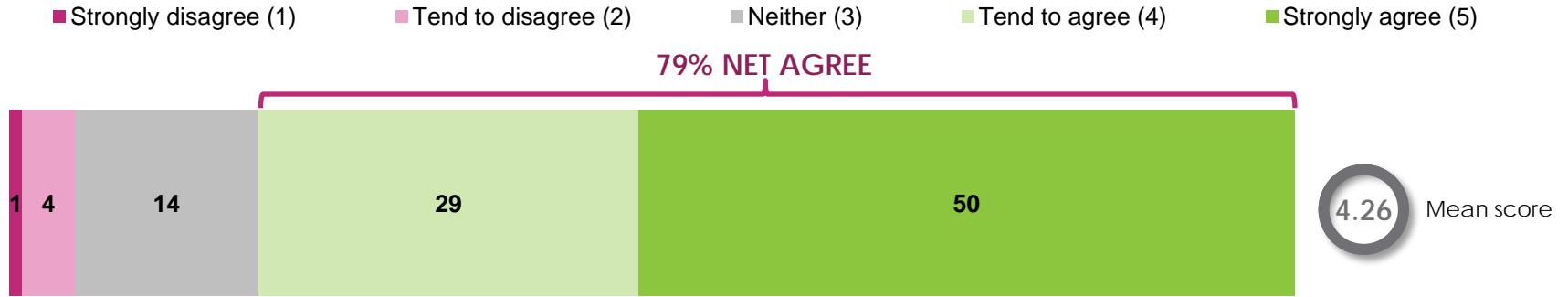
Recording the main destination and pick-up locations at the time of booking is favoured, particularly among the 45+ age group



Q11. All respondents (2,628)
Online and Telephone sample

Operator staff should be subjected to criminal records checks as part of their application process. This amended proposal does not apply to drivers (as checks are already a requirement for them), but to customer-facing staff in private hire offices

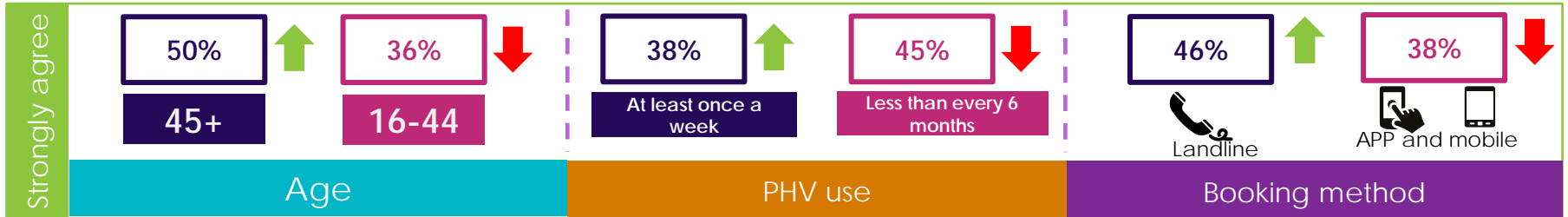
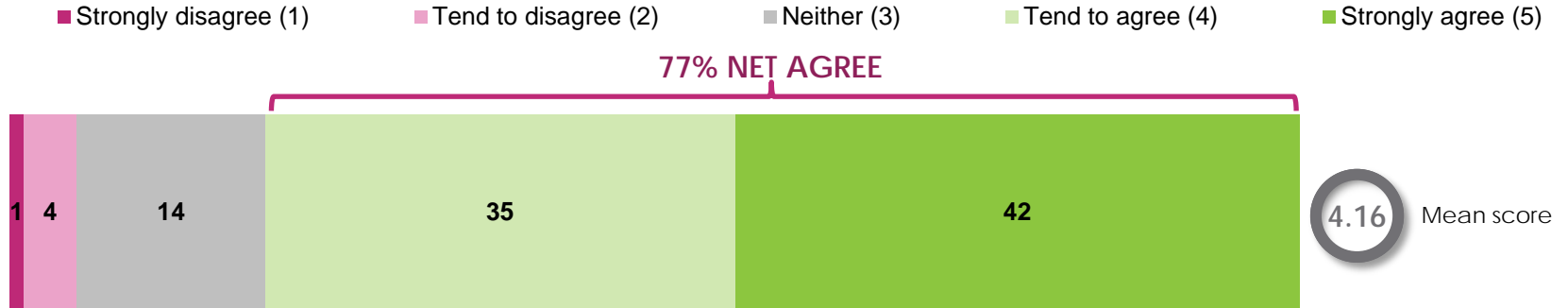
Support for criminal record checks of operator staff is high, particularly among older and female Londoners



Q13. All respondents (2,528)
Online sample

Operators who use apps to allocate drivers to a fare must have appropriate security measures to prevent the app being used by a person other than the licensed driver

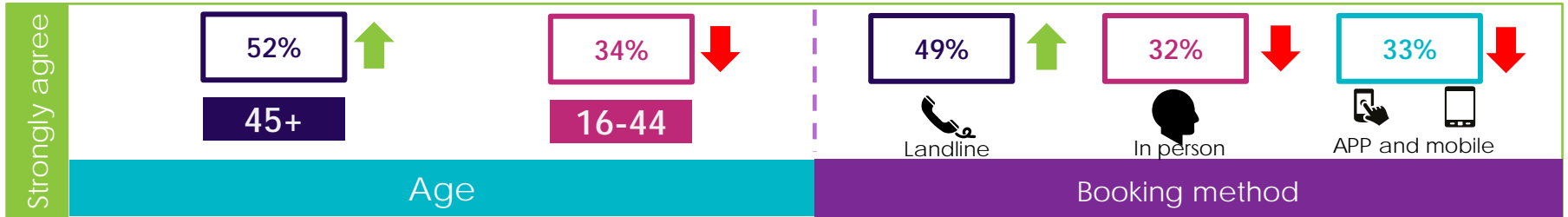
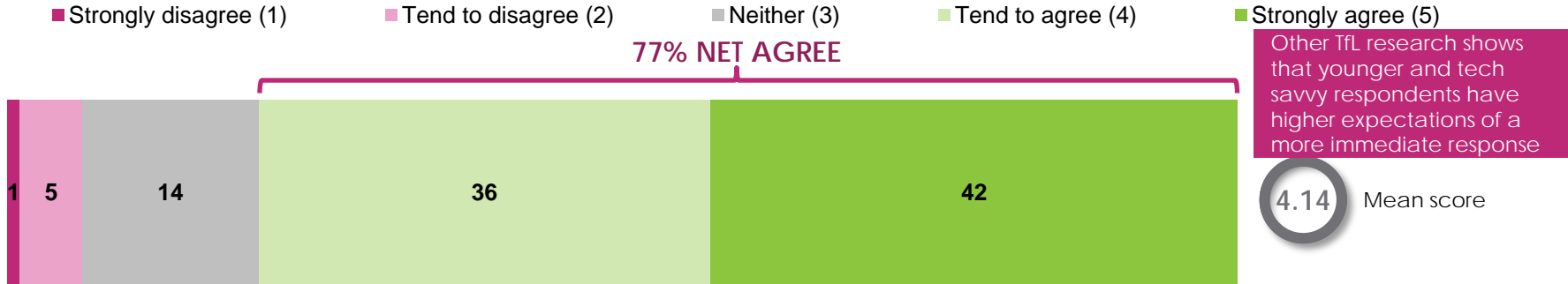
Although overall support for appropriate app security to prevent use by unlicensed individuals is high, app users are less likely to agree strongly with this proposal



Q5. All respondents (2,628)
Online and Telephone sample

Operators must have a fixed landline number available for passenger use at all times when their vehicles are fulfilling or accepting bookings

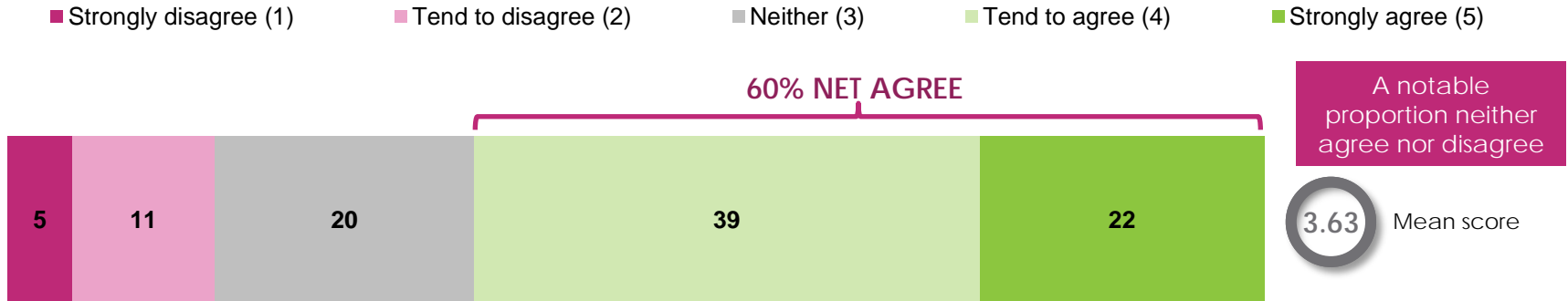
The availability of landlines is seen as important, particularly by those who are aged 45+. This age group is also the most likely to use landline for bookings



Q8. All respondents (2,628)
Online and Telephone sample

There must be at least a five minute wait period before a private hire journey commences in order for operators to provide booking confirmation details to passengers

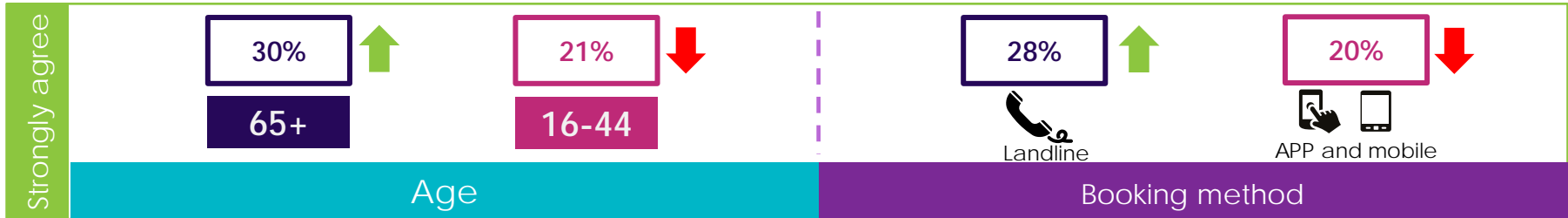
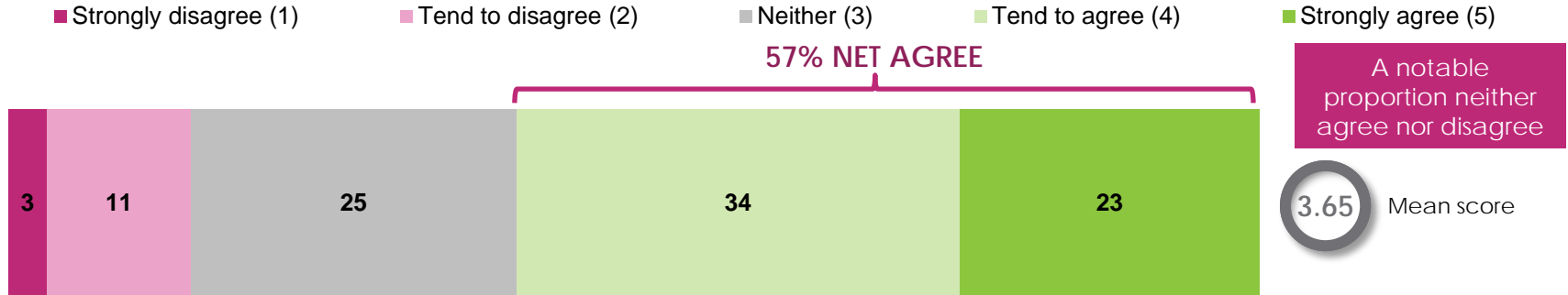
Views of this proposal not as strong, with older Londoners and those who book using a landline more likely to favour a five minute wait time



Q4. All respondents (2,628)
Online and Telephone sample

All operators must be legally required to offer the ability to pre-book up to seven days in advance

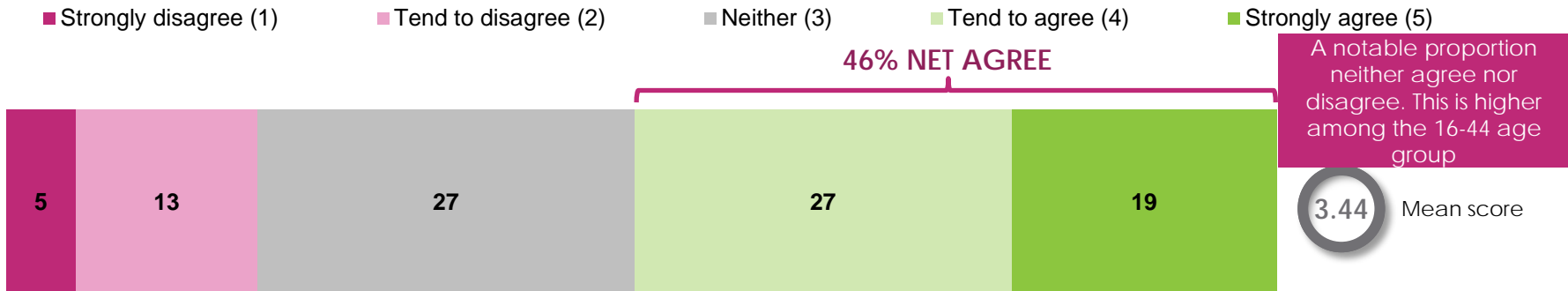
The ability to pre-book well in advance is not as high a priority as other proposals. However, older Londoners are more likely to value such a service



Q6. All respondents (2,628)
Online and Telephone sample

TfL will no longer issue licenses to private hire vehicle operators that accept bookings inside or outside late-night venues with the vehicles themselves parked nearby

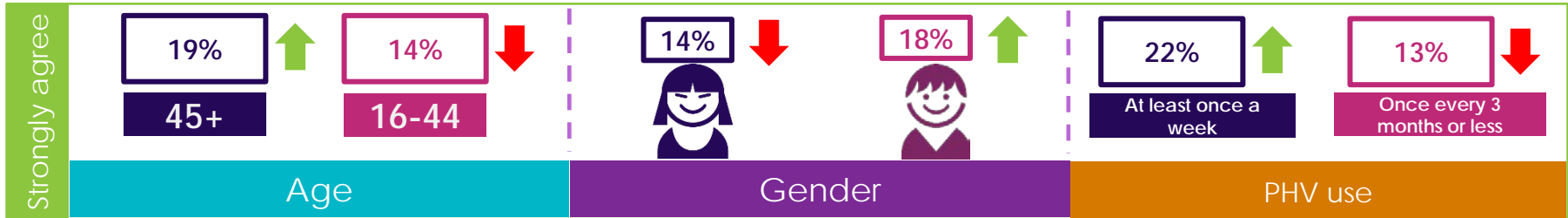
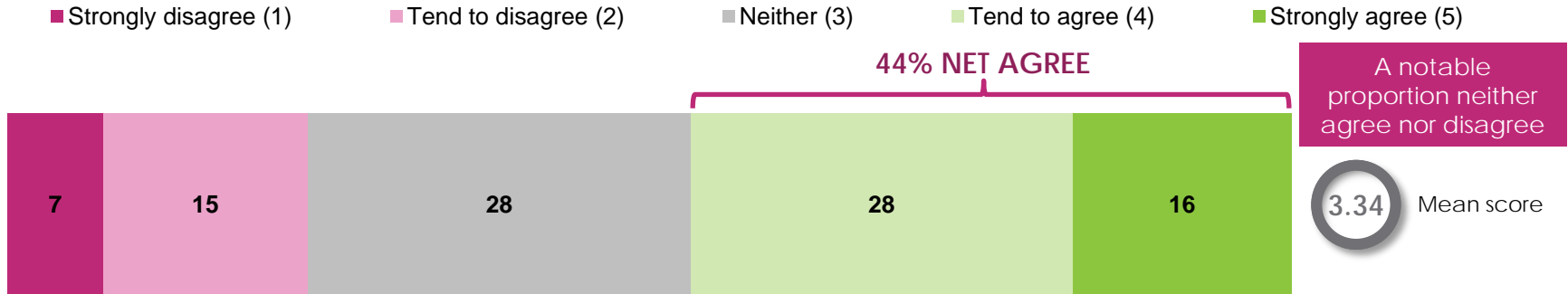
The proposal does not resonate as strongly with Londoners, with younger people less likely to agree strongly



Q7. All respondents (2,528)
Online sample

Operators must not show vehicles being available for immediate hire, either visibly, for example by signage on the street; or virtually, on an app

Londoners are least likely to agree with visible or virtual display of immediate hire of vehicles not being shown



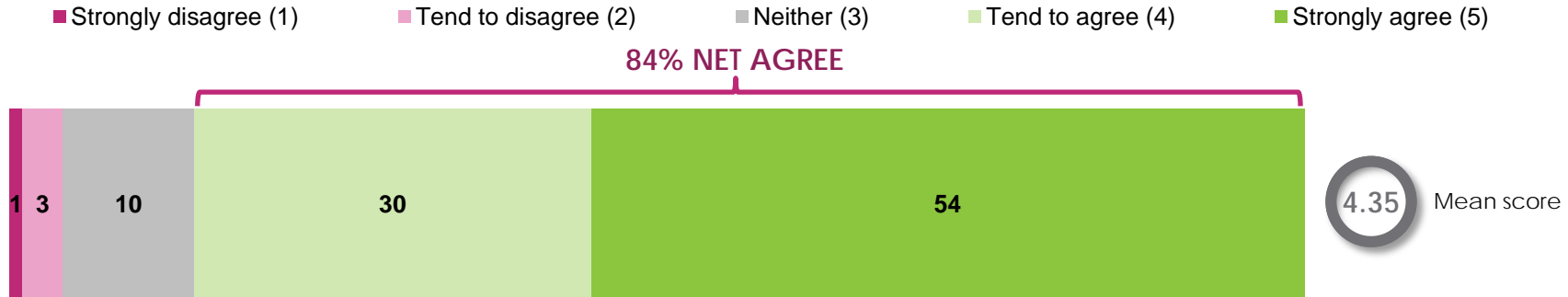
Q10. All respondents (2,628)
Online and Telephone sample



Drivers

Private hire drivers should be required to demonstrate a certain standard of English, with particular emphasis on ability on spoken communication

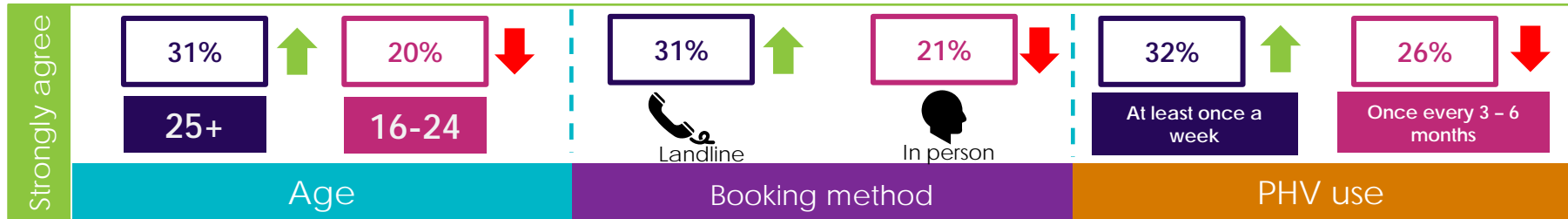
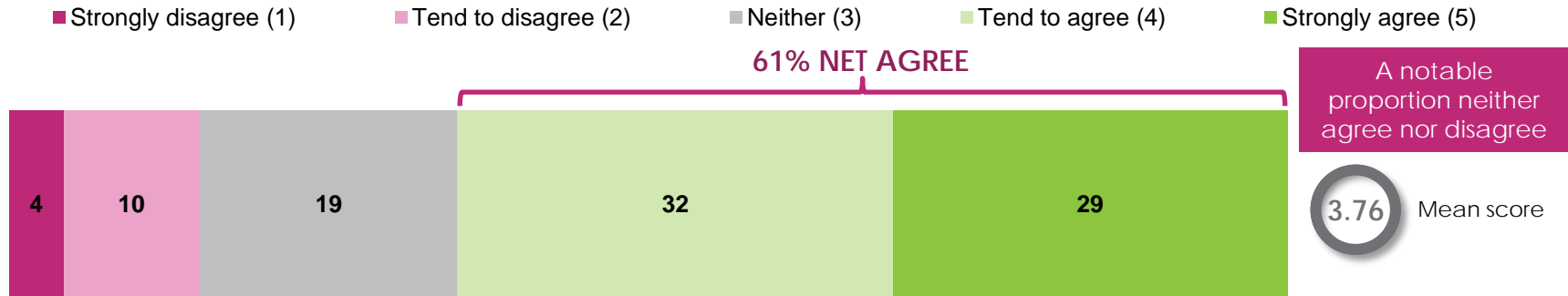
A certain standard of spoken English among drivers is a priority for Londoners, especially important for those aged 45+ and those who make their booking over the phone



Q14. All respondents (2,528)
Online sample

Private hire vehicles cannot be used for ride-sharing purposes in London unless there are very clear controls in place to protect the safety of passengers and drivers

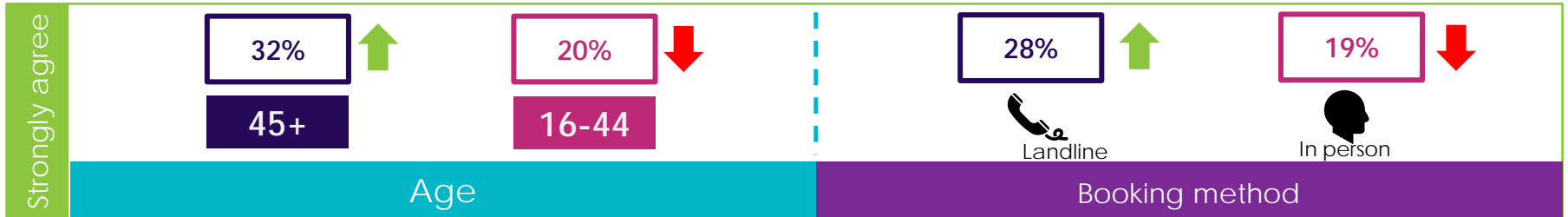
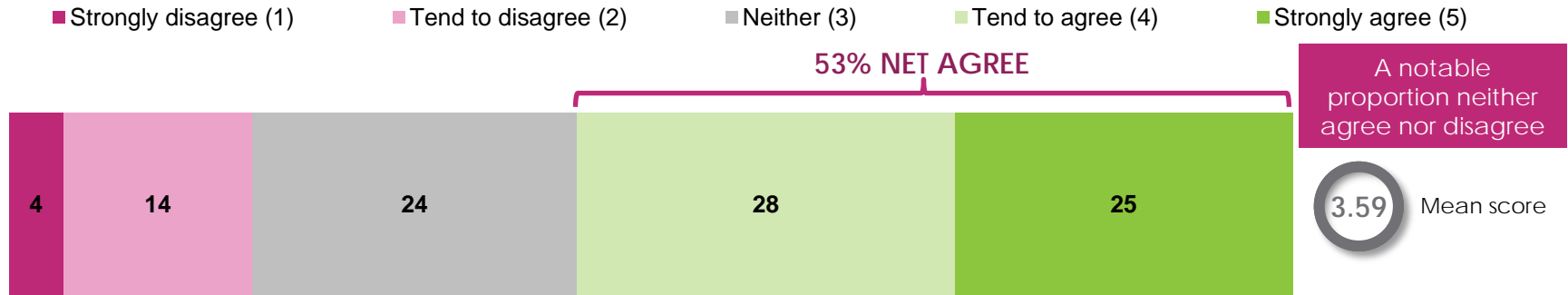
Ride-sharing controls to protect passenger and driver safety is not as high a priority as other proposals. However, frequent PHV users are more likely to value this service



Q16. All respondents (2,628)

Online and Telephone sample

Londoners show some concern with regards private hire drivers only being registered to a single operator



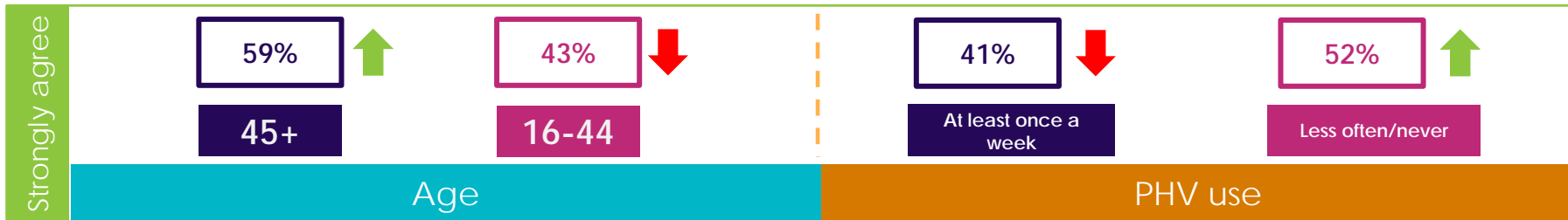
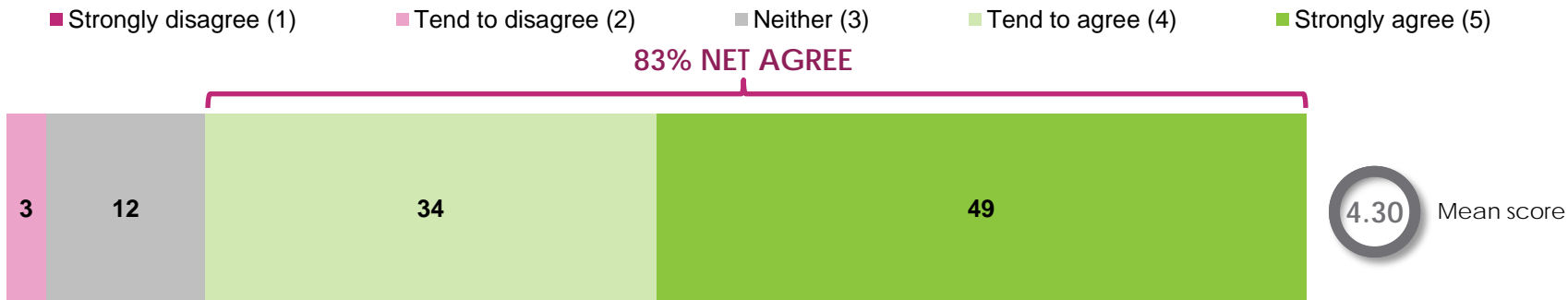
Q15. All respondents (2,628)
Online and Telephone sample

The image features a solid orange background. On the left side, there are three white arrow shapes pointing to the right. The top arrow is a simple triangle. The middle arrow is a larger, more complex shape with a rectangular base and a pointed tip. The bottom arrow is a simple triangle, similar to the top one. The word "Technical" is written in white, sans-serif font in the center of the image.

Technical

Drivers to carry or display a copy of insurance details at all times

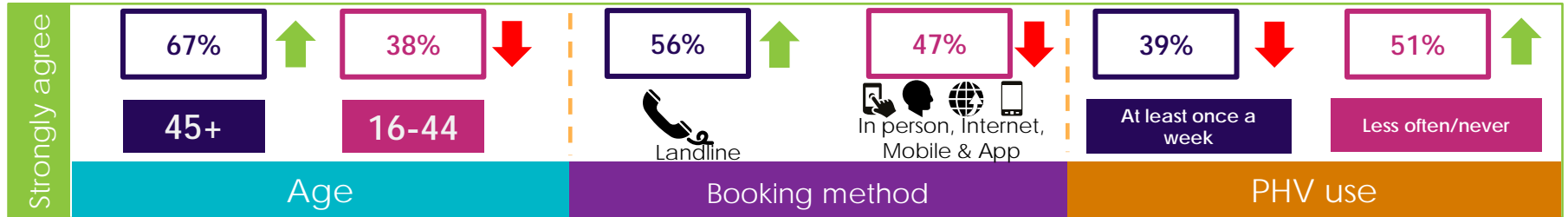
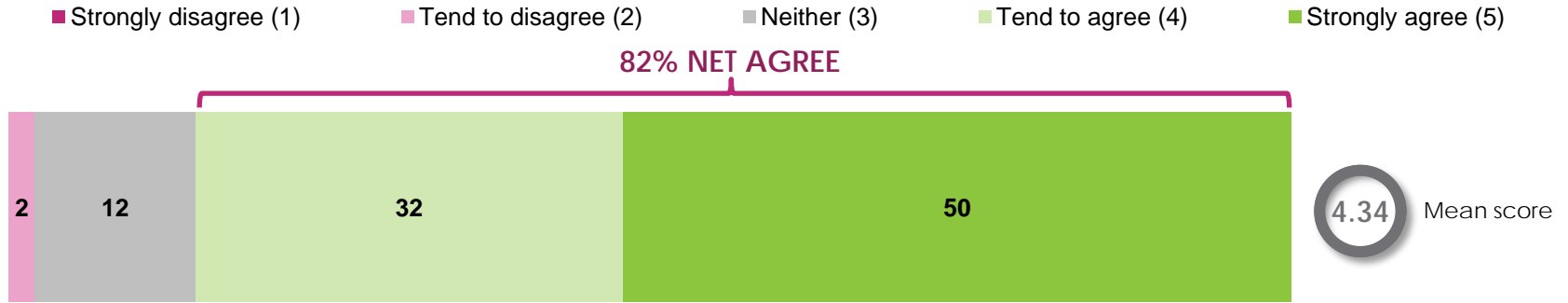
Strong sense that insurance details should be carried or displayed at all times, particularly among older Londoners



Q17C. All respondents (2528)
Online sample

Hire and Reward insurance to be checked at point of licensing and must be in place for duration of vehicle licence.

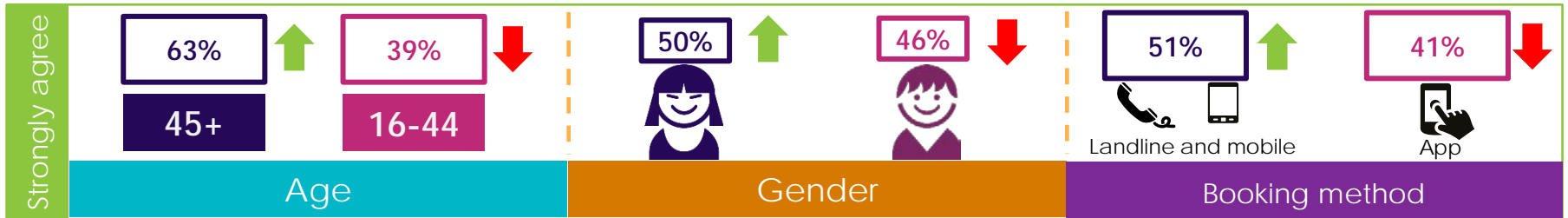
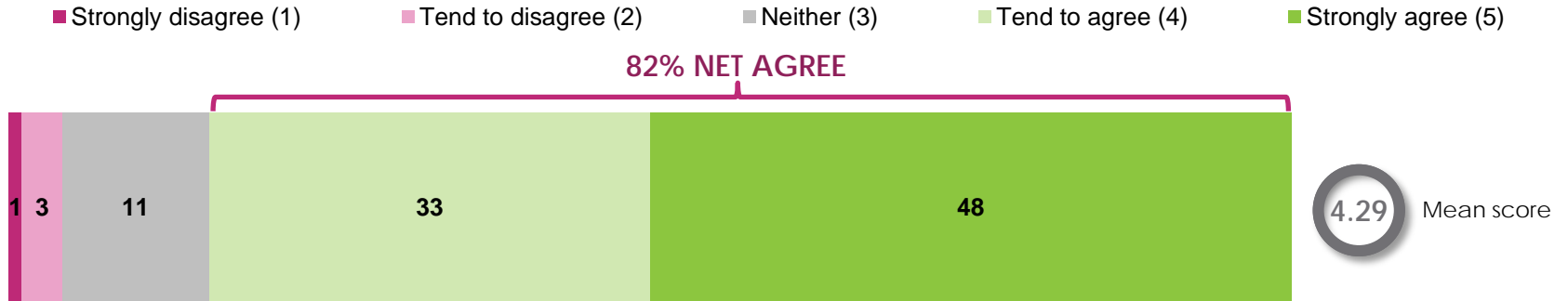
Checking Hire and Reward insurance at point of licensing is regarded as important, especially for those aged 45+



Q17B. All respondents (2,528)
Online sample

Operators will be required to provide specified information including details of all drivers and vehicles to TfL on a regular basis

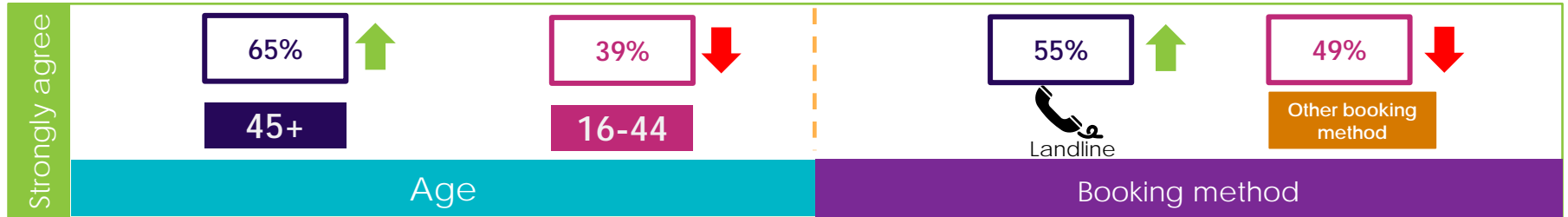
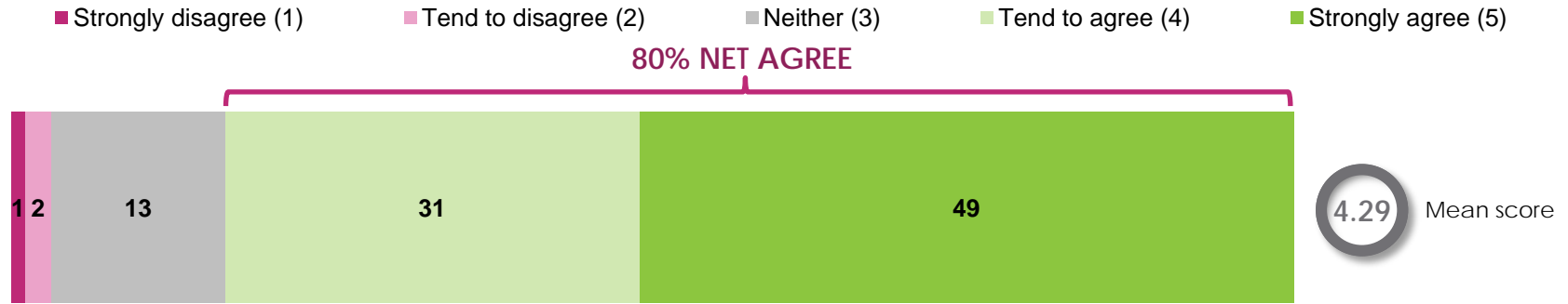
Londoners strongly support the idea to have operators provide specified information to TfL on a regular basis



Q17E. All respondents (2,528)
Online sample

Driver and Operator licence applicants required to provide National Insurance numbers and share with Department for Work and Pensions

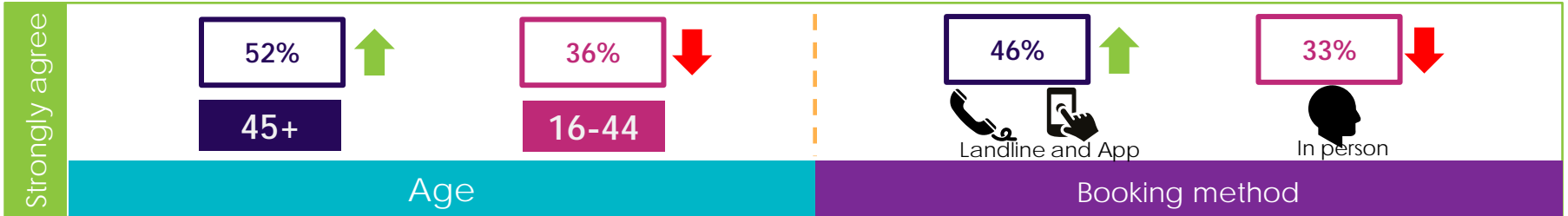
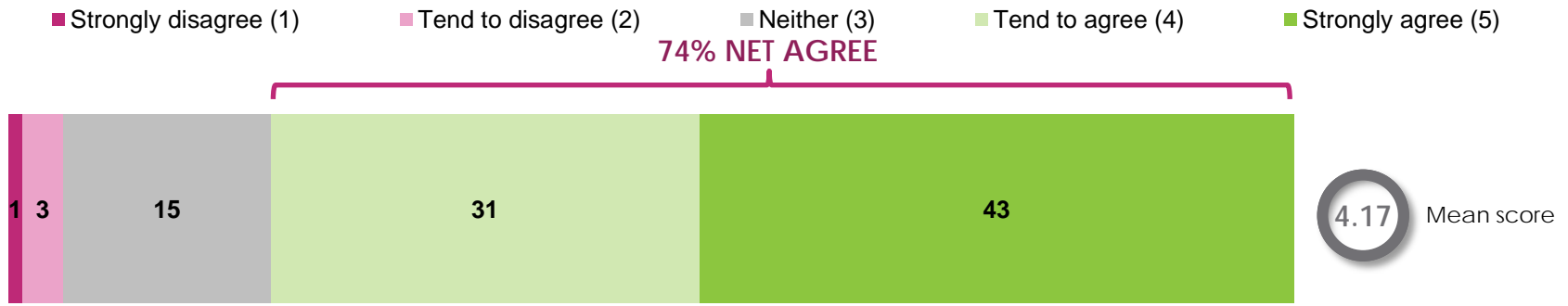
The proposal to have licence applicants provide National Insurance numbers receives high support, particularly among older Londoners



Q17F. All respondents (2,528)
Online sample

A driver's private hire vehicle licence to be automatically revoked if their private hire driver's licence is revoked

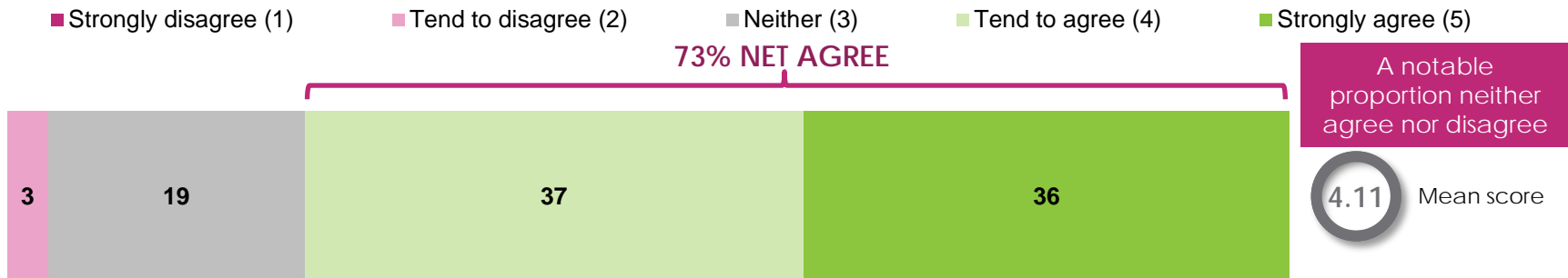
Strong support to revoke vehicle licenses automatically if a driver's licence is revoked, particularly among older Londoners



Q17A. All respondents (2528)
Online sample

Operators to be required to have Hire and Reward fleet insurance. This is an alternative to drivers being responsible for their own Hire and Reward insurance. Some operators already have fleet insurance in place, this would make it compulsory. Hire and Reward insurance is a type of insurance that allows holders to legally carry people and/or other people's goods for payment

Hire and Reward fleet insurance is not as big a concern as other insurance-related matters



Q17D. All respondents (2,528)
Online sample



Comparisons

- Disabled Londoners
- Use of PHVs

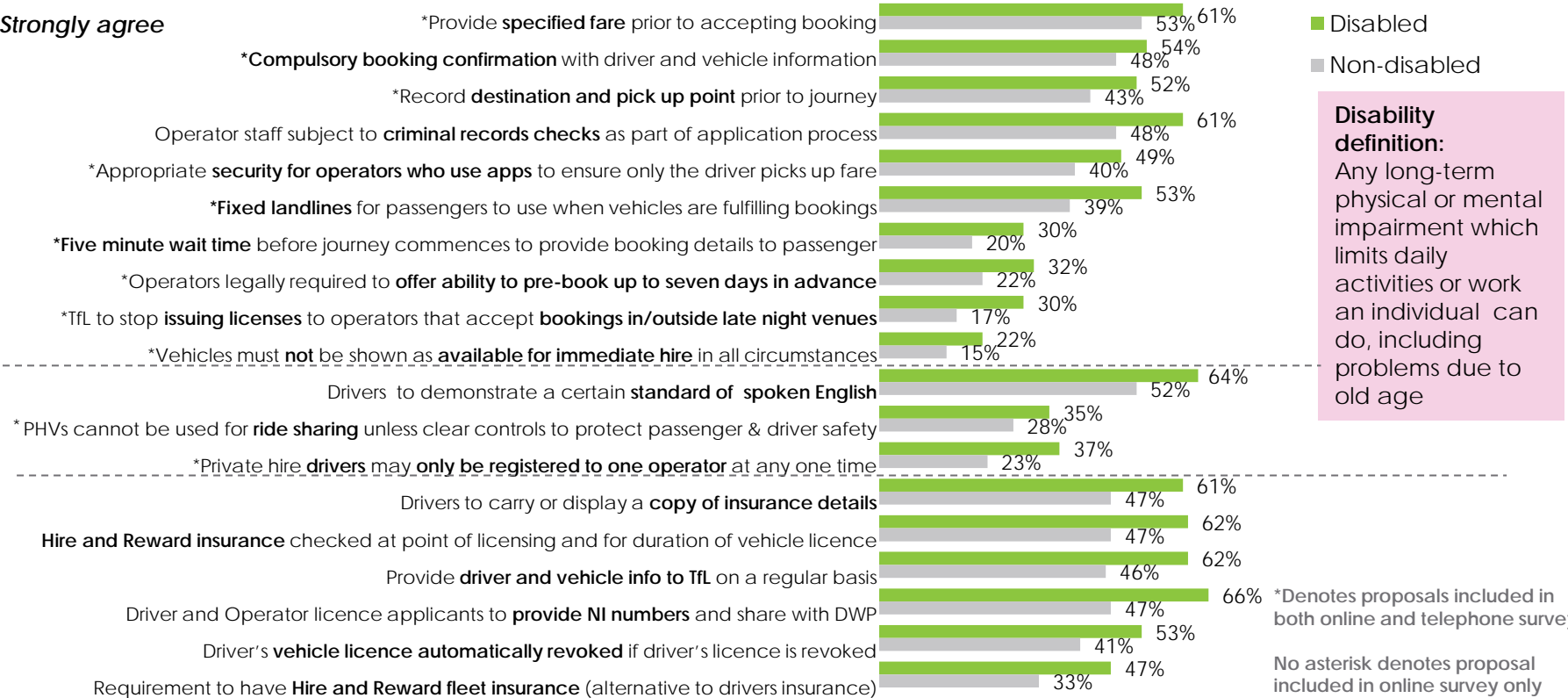
Disabled Londoners are significantly more likely to support all proposals compared to non-disabled Londoners

% Strongly agree

Operators

Drivers

Technical



■ Disabled
■ Non-disabled

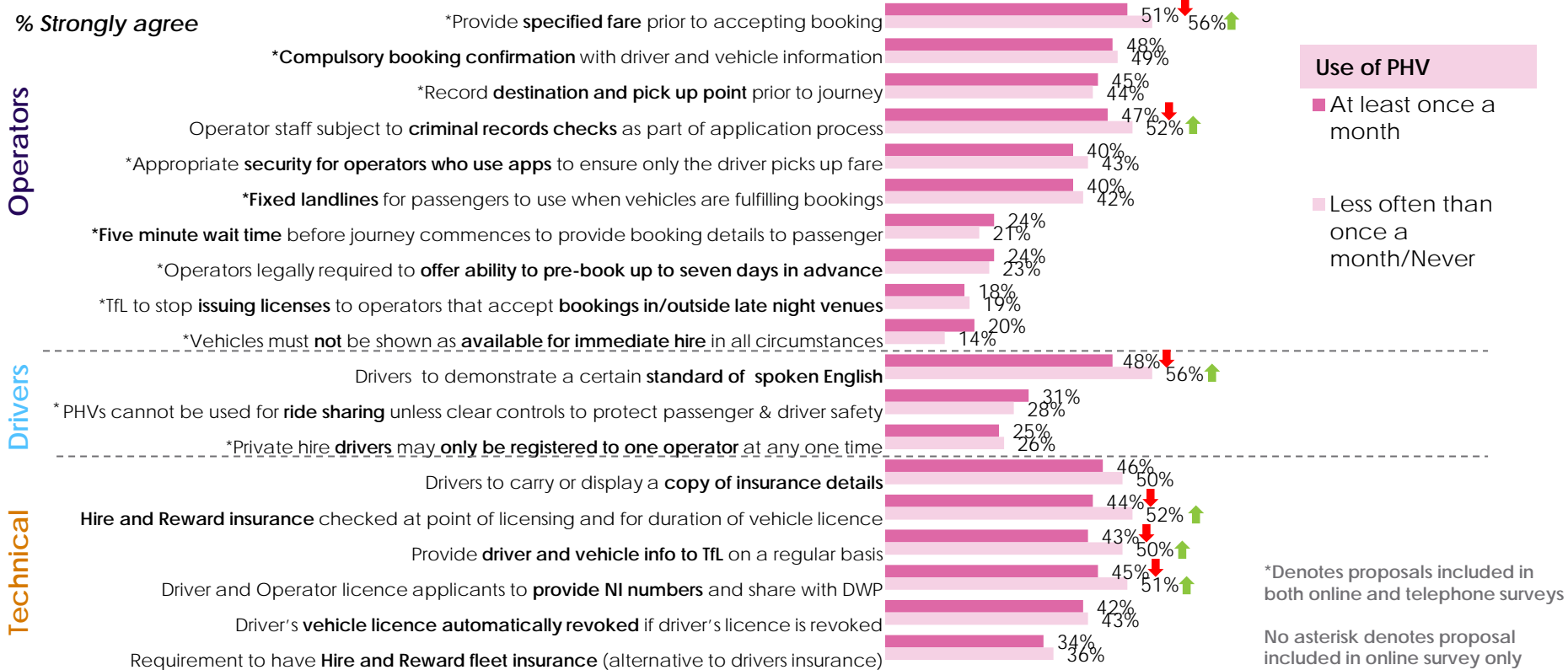
Disability definition:
Any long-term physical or mental impairment which limits daily activities or work an individual can do, including problems due to old age

*Denotes proposals included in both online and telephone surveys

No asterisk denotes proposal included in online survey only

To what extent do you agree or disagree with this proposal? Scale: Strongly agree (+5), Tend to agree (4), Neither agree nor disagree (3), Tend to disagree (2), Strongly disagree (1). Base: Disabled (401), Non-disabled (2,227)

There are some differences between those who use PHVs at least once a month and those who use less often/never use



To what extent do you agree or disagree with this proposal? Scale: Strongly agree (+5), Tend to agree (4), Neither agree nor disagree (3), Tend to disagree (2), Strongly disagree (1). Base: At least once a month(784)/(739 online), Less often than once a month/ Never (1,844)/(1,789 online)

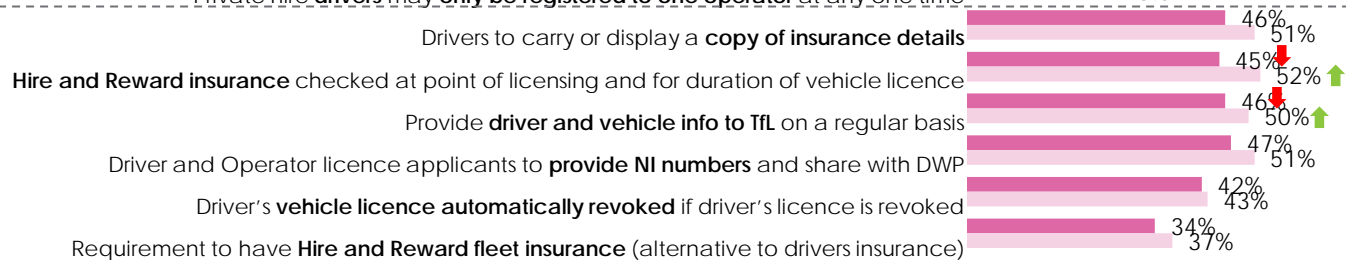
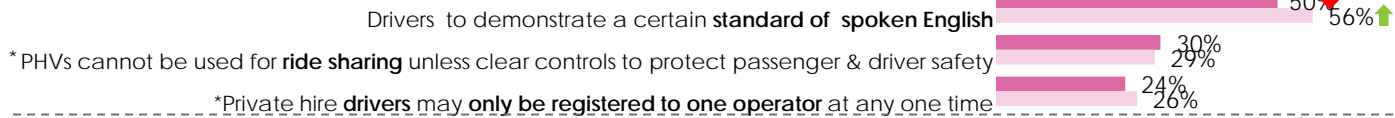
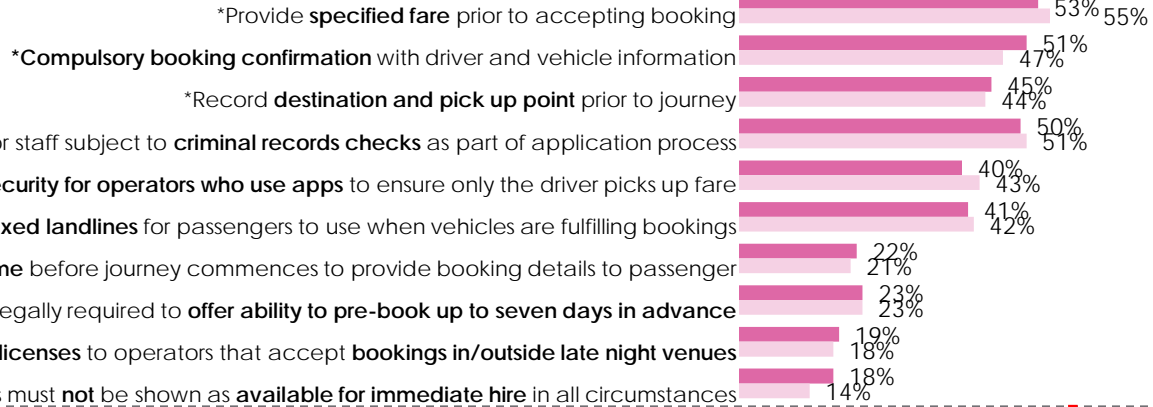
There are few differences between those who use at least once every 3 months and those who use less often/never use

% **Strongly agree**

Operators

Drivers

Technical



Use of PHV

At least once every 3 months

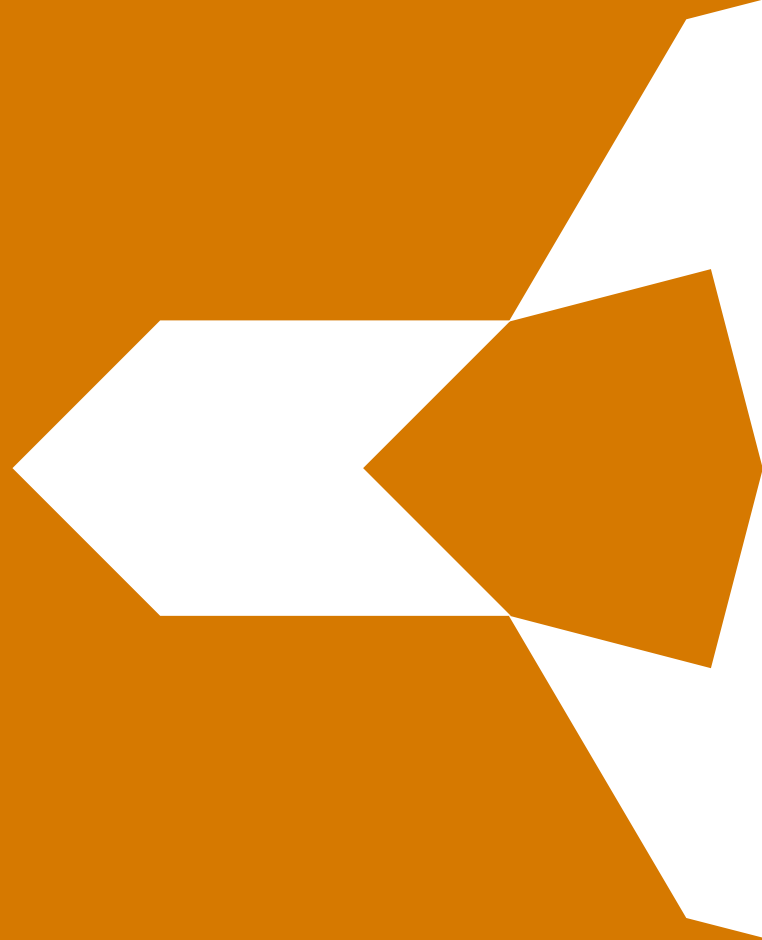
Less than once every 3 months/ Never

*Denotes proposals included in both online and telephone surveys

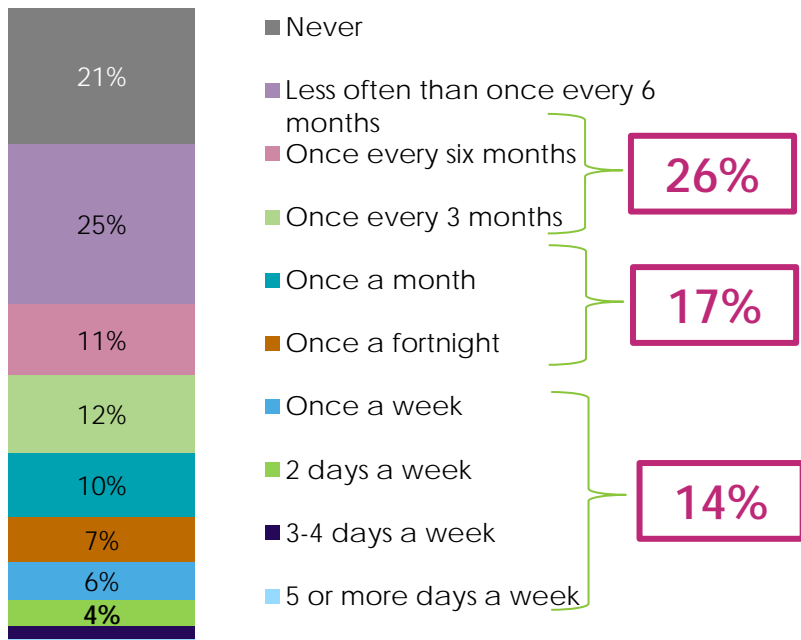
No asterisk denotes proposal included in online survey only

To what extent do you agree or disagree with this proposal? Scale: Strongly agree (+5), Tend to agree (4), Neither agree nor disagree (3), Tend to disagree (2), Strongly disagree (1). Base: At least once every 3 months (1091)/(1,028 online), Less often than once every 3 months/ Never (1,537)/ (1,500 online)

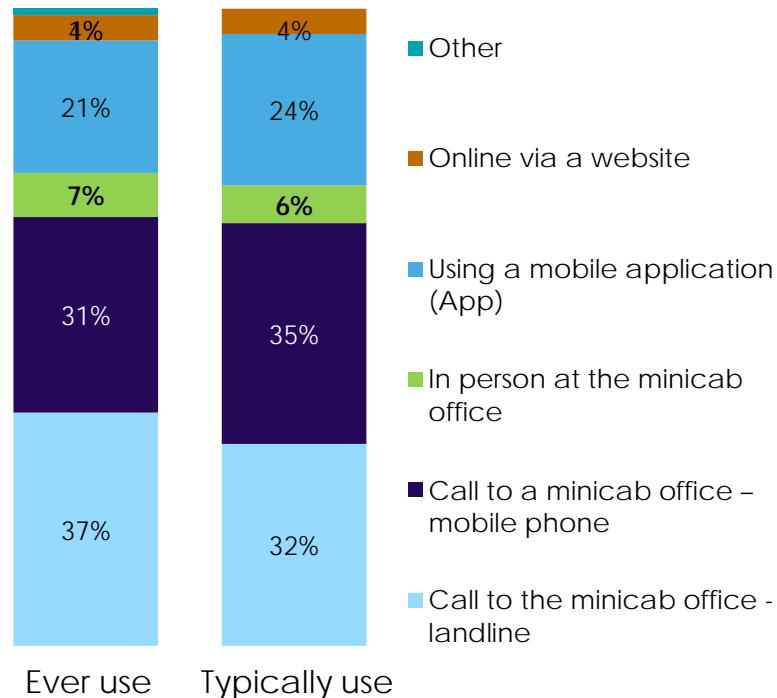
PHV use & contact



Use of PHVs is widespread



Calling the PHV office either on landline or mobile are the most commonly used booking methods



Frequency of usage Minicab/ PHV

Q1; All respondents (2,628)
Online and Telephone sample










Methods used for booking minicab/ PHV

Q2a; Q2bAll respondents (2,059)
Online and Telephone sample

Landline and mobile are the two methods that Londoners are most likely to use if an issue arises with their journey

In the event of an issue emerging with your journey, which of the following methods of communication are you willing to use to contact the private hire operator? (please rank your top three preferred methods):








Those who would communicate using a landline are also likely to use a landline to book a PHV; similarly, those who would use an app also use this method for bookings

	Any method of contact	Rank 1	Rank 2	Rank 3
 Landline number	72%	45%	18%	9%
 Mobile phone number	83%	37%	36%	11%
 Via an app	31%	7%	9%	16%
 SMS	40%	4%	15%	21%
 Email	33%	4%	12%	18%
 In person	33%	3%	8%	22%
 Twitter	4%	0%	1%	2%
Other	1%	0%	0%	1%

Q9. All respondents (2,528)
Online sample

Regardless of how often Londoners use PHVs, contact via phone would be the most used method to communicate should an issue arise

In the event of an issue emerging with your journey, which of the following methods of communication are you willing to use to contact the private hire operator? (please rank your top three preferred methods):

			Rank 1 - by use of PHV	
	Any method of contact	Rank 1	Use a PHV at least once a month	Use a PHV less than once a month/Never
 Landline number	72%	45%	35%	49%
 Mobile phone number	83%	37%	40%	36%
 Via an app	31%	7%	11%	5%
 SMS	40%	4%	6%	3%
 Email	33%	4%	5%	3%
 In person	33%	3%	2%	3%
 Twitter	4%	0%	1%	0%
Other	1%	0%	0%	0%



Favoured method of booking varies by age...

In the event of an issue emerging with your journey, which of the following methods of communication are you willing to use to contact the private hire operator?
(please rank your top three preferred methods):



Landline

High among those aged 35+ although higher among 55+



SMS

Highest among the 16-44 age group



App

Highest among 16-34 age group and particularly low among 65+ group



Email

Highest among 45+ age group



In person

Higher among 55+ age group



Mobile

High across the board, although slightly lower among 65+

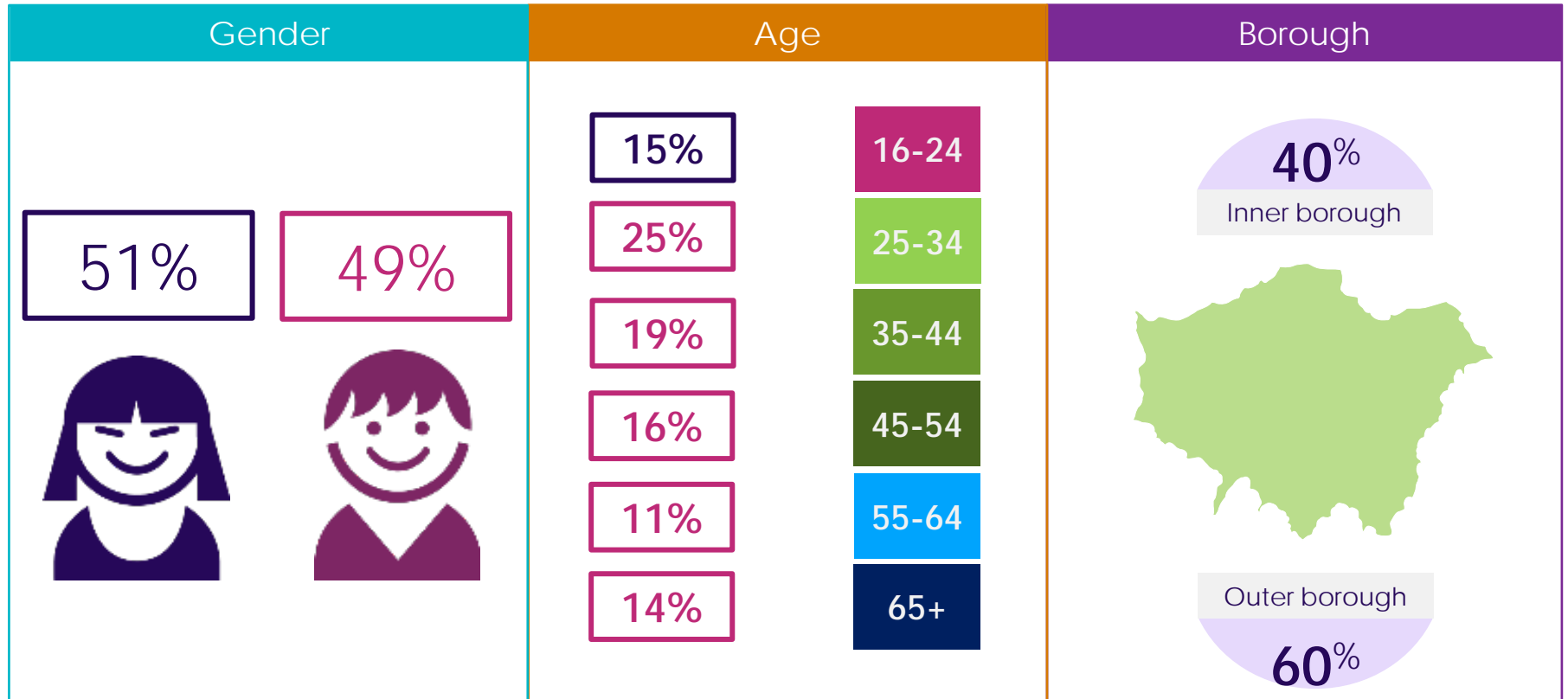
Q9. All respondents (2,628)
Online and Telephone





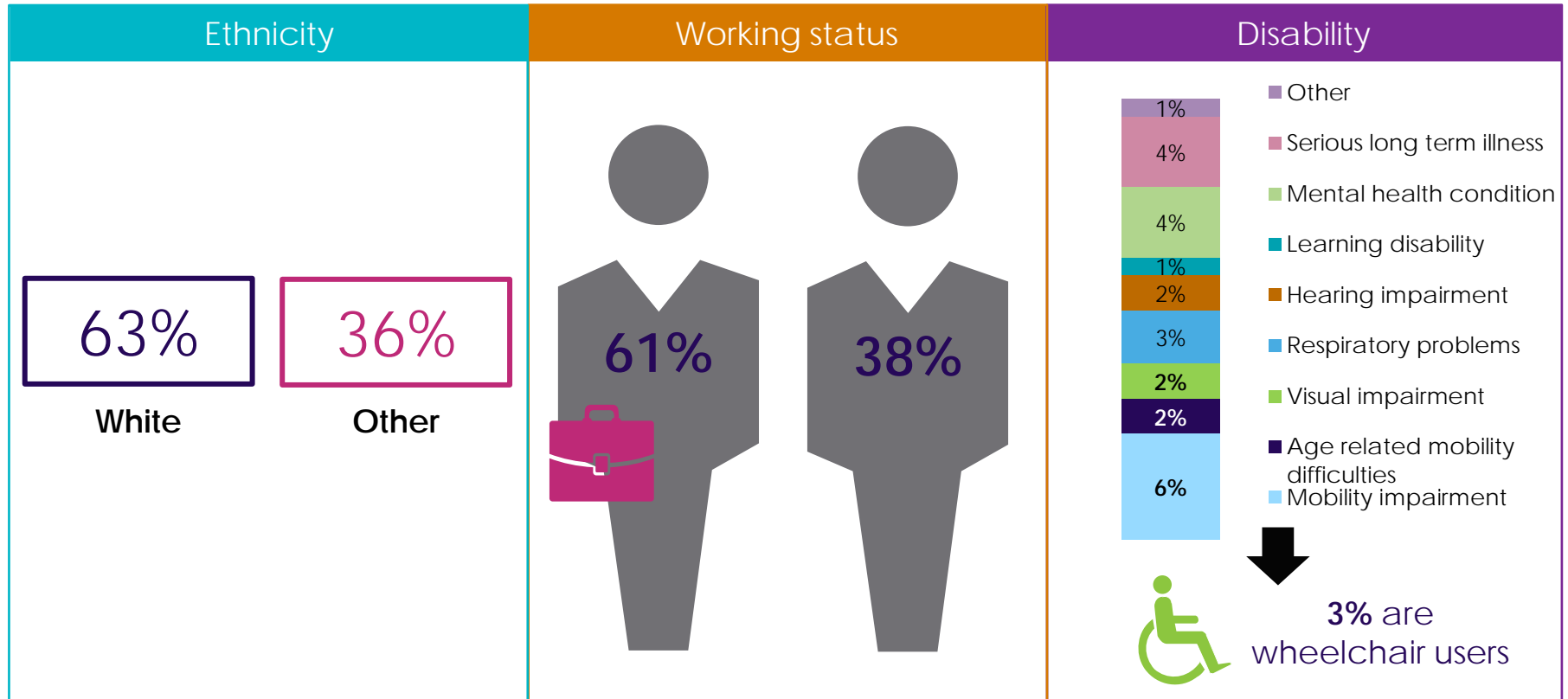
Demographics

Demographic breakdown profile



S2 ; S3; S4. All respondents (2,628)
Online and Telephone

Demographic breakdown



D1; D2; D4a; D4b. All respondents (2,628)
Online and Telephone



Appendices

Weighting profile

Data are weighted to representative London profile

Weighting applied on:

- Gender
- Age
- Ethnicity
- Working Status
- Borough

2,628

Interviews conducted with Londoners aged 16+

Gender	% of survey results	London proportion weighting %
Gender		
Male	47%	49%
Female	53%	51%
Age		
16-24	12%	15%
25-34	22%	25%
35-44	19%	19%
45-54	17%	16%
55-64	12%	11%
65+	18%	14%
Ethnicity		
White	74%	63%
Non White	25%	37%
Working Status		
Working	64%	61%
Not Working	36%	39%
Borough		
Inner	39%	40%
Outer	61%	60%

A total of 19 proposals were evaluated in the online survey, with 10 being evaluated in the telephone survey

	Online	Telephone
Provide specified fare prior to accepting booking	✓	✓
Compulsory booking confirmation with driver and vehicle information	✓	✓
Record destination and pick up point prior to journey	✓	✓
Operator staff subject to criminal records checks as part of application process	✓	✗
Appropriate security for operators who use apps to ensure only the driver picks up fare	✓	✓
Fixed landlines for passengers to use when vehicles are fulfilling bookings	✓	✓
Five minute wait time before journey commences to provide booking details to passenger	✓	✓
Operators legally required to offer ability to pre-book up to seven days in advance	✓	✓
TfL to stop issuing licenses to operators that accept bookings in/outside late night venues	✓	✗
Vehicles must not be shown as available for immediate hire in all circumstances	✓	✓
Drivers to demonstrate a certain standard of spoken English	✓	✗
PHVs cannot be used for ride sharing unless clear controls to protect passenger & driver safety	✓	✓
Private hire drivers may only be registered to one operator at any one time	✓	✓
Drivers to carry or display a copy of insurance details	✓	✗
Hire and Reward insurance checked at point of licensing and for duration of vehicle licence	✓	✗
Provide driver and vehicle info to TfL on a regular basis	✓	✗
Driver and Operator licence applicants to provide NI numbers and share with DWP	✓	✗
Driver's vehicle licence automatically revoked if driver's licence is revoked	✓	✗
Requirement to have Hire and Reward fleet insurance (alternative to drivers insurance)	✓	✗

✓ Proposal included in survey

✗ Proposal not included in survey

Reading survey results



The PHV proposals are colour coded to represent the type of proposal (Operational proposals are in lilac, Driver proposals are in blue and Technical proposals are in orange). The proposals are always shown at the very top of the page in the relevant section

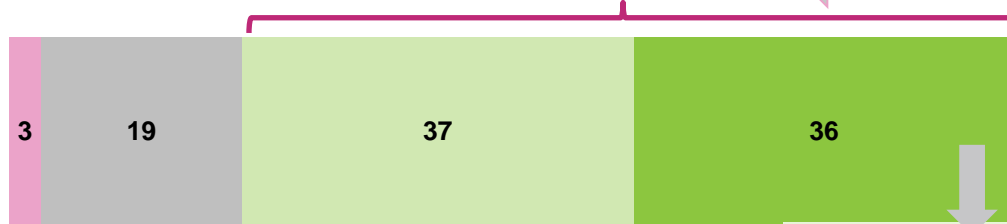
The commentary relating to each of the proposals is shown just below the proposal

Headline finding

At the top of each bar; there is a NET AGREE percentage shown. This is a combination of the *Tend to agree* and *Strongly agree* responses

Strongly disagree (1) Tend to disagree (2) Neither (3) Tend to agree (4) Strongly agree (5)

73% NET AGREE

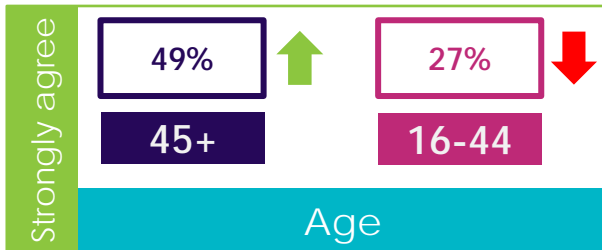


4.17

Mean score

The mean score is derived from a 5 point scale ranging from *Strongly disagree* which has been allocated a nominal score of 1 to *Strongly agree* which has a score of 5. The legend at the top of the bar shows the score for each of the responses on the scale. A high mean score demonstrates a strong strength of feeling to the proposal

The bar chart shows the results to each of the proposals. Don't know responses are not shown in the charts



At the bottom of the chart we show the subgroups of Londoners who particularly agree strongly and significant differences are greatest

Statistically significant results

A statistically different result means that we can be 95% certain that this difference is larger than can reasonably be explained as a chance occurrence. A green arrow denotes significantly higher and red denotes lower within subgroup



Talk London survey methodology

Talk London is an inclusive, vibrant online community of 15,000 Londoners that supports City Hall in placing citizens needs at the centre of its strategies and programmes by involving them in meaningful research, debate and consultation about how to improve the capital. Talk London was launched in July 2012.

Details of this particular Talk London survey:-

- Results are based on interviews with 869 respondents aged 18+
- Interviews were carried out online via the Talk London community between 19 October and 23 November 2015
- Participants were self-selecting. 96% of respondents identified themselves as members of the public

Respondents were presented with each proposal, along with commentary to outline the implications of the change or maintaining the status quo, approved by TfL's Taxi & Private Hire team and the GLA's Transport Team. Respondents were asked the degree to which they agree or disagree with each proposal. Consideration was given to demographic differences in opinion during the analysis stage, particularly for those proposals which could be expected to impact on particular groups, but given the non-random sample, these conclusions were indicative-only, with further research required to understand the drivers behind perceptions.

future thinking

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