

Transport for London

Late night travel options
2016

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future
thinking

MAYOR OF LONDON

Transport for London





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Background





The research

Since August 2003, TfL has been monitoring the attitudes and behaviour of Londoners' travel choices when leaving late night venues

This research measures the share of journeys made by unbooked minicabs and explores behaviour/perceptions towards unbooked minicabs

Fieldwork comprised:

- 526 telephone interviews *
- Respondents recruited face-to-face at late night venues
- Recruited from 20 venues split across West End and Other parts of London
- Recruited individuals were contacted by phone to take part in the telephone survey
- Fieldwork took place between 9 January – 13 March

* Overall sample size reduced by 125 from '14/15 because of management changes/lack of cooperation and reduced footfall at late night venues

2015/16 campaign spend = TBC

Comparing STaN surveys

- TfL conducts **two quantitative projects** annually around the area of Safer Travel at Night:
 - The STaN campaign evaluation (TNS), typically conducted in October (acting as a pre wave) and January (post wave following Christmas / New Year) among a representative sample of women 18-27;
 - A study examining market share of unbooked minicab use (this report and conducted by Future Thinking), typically conducted in January and February among a sample of men and women at London bars and clubs.
- While there are understandably a number of similarities in terms of specific questions included, the data collected are not directly comparable due to the following research factors :

	Campaign evaluation	Market share
How people were invited to participate in the survey...	Respondents are recruited through an online panel	Respondents are recruited outside London bars and clubs (from 9pm onwards) and called within a week
How recruitment influenced the profile of participants...	Representative of 18-27 year old women (reflecting on their behaviour over the festive period). The survey also includes a boost of students, however these were reported separately from the main sample.	Recruiting those who are out at night in January (after the festive period, and in the winter) is not reflective of the population as such but of a targeted sub sample. The data is weighted to reflect the profile of those out at night in London during the recruitment period.
How they were asked the survey questions	Online survey	Telephone survey



Key findings



Key Insights

- Use of unbooked minicabs has continued to fall this year, reaching its lowest level since reporting began amongst both the total sample and women aged 16-34 (which is now zero)
- Similarly, touting appears to potentially be on the decline, with significantly fewer women aged 16-34 reporting having been approached by a tout on the night of recruitment
- Propensity to use unbooked minicabs in the future has also remained low both for the total sample and women aged 16-34
- The most popular alternative type of late-night transport continues to be buses (although in decline since 2014) and both the total sample and women aged 16-34 have shown an increase in walking from venues to their next destination
- There continue to be misconceptions around minicab regulations, with nearly half of women aged 16-34 thinking that minicabs can legally pick up customers who approach them in the street and a third who believe it is okay for minicab drivers to approach customers outside bars / clubs
 - Worryingly, women aged 16-34 are also less likely to perceive unlicensed cabs/cab drivers to be unsafe this year
- Among women aged 16-34 who have ever taken an unbooked minicab, the main reason was due to a lack of other available options. Conversely, safety concerns continue to be the overriding factor discouraging use of unbooked minicabs
- Uber remains by far the most well-known and also the most used app for minicab bookings.



Transport modes used to reach onward destinations

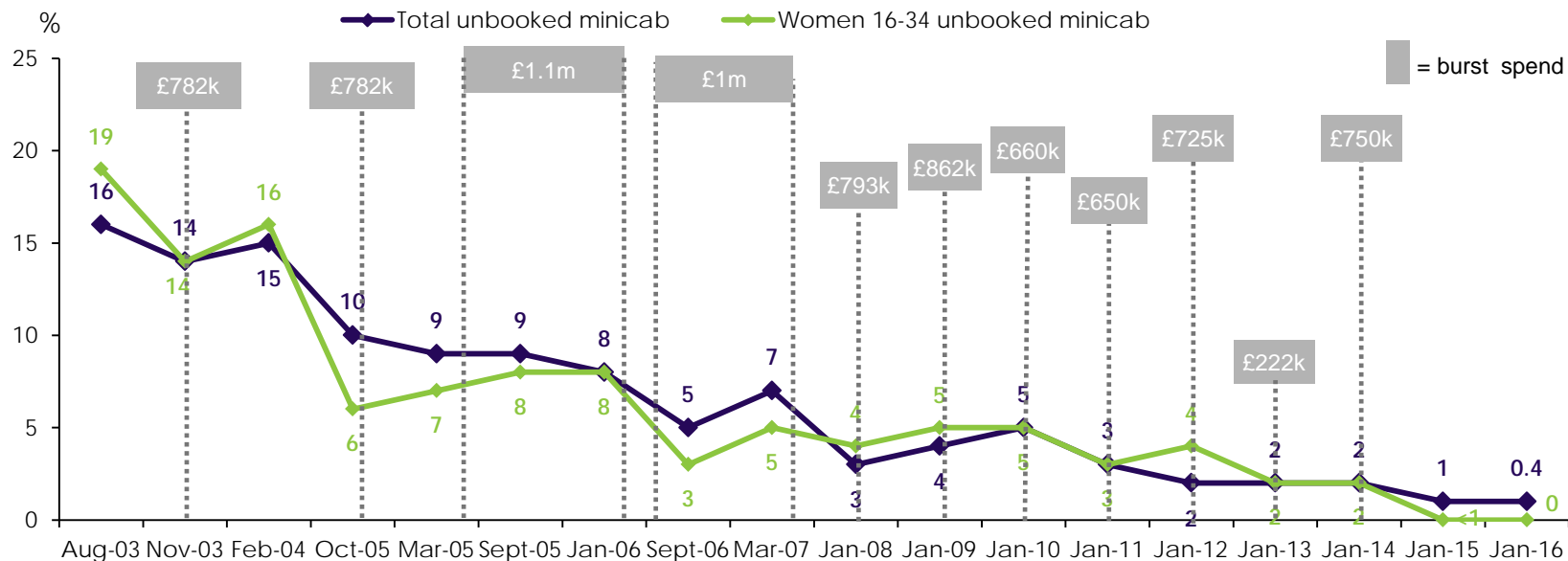
Unbooked minicab market share



There is now no usage of unbooked minicabs amongst the target group of women aged 16-34 and its under one per cent across all Londoners

Unbooked minicab use when leaving venue

For women aged 18-27, unbooked minicab share is 0%



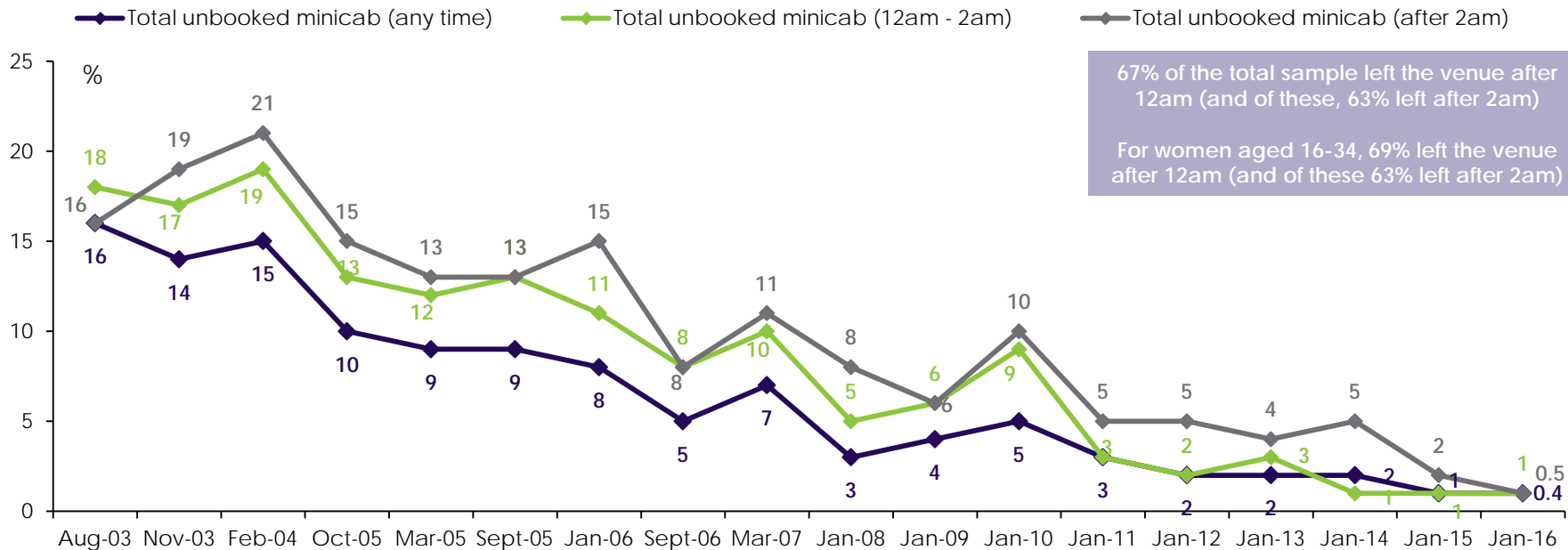
No significant differences with Jan-15

Q5a/b What form of transport did you use to get to your next destination when you left [venue]?

Base: all respondents/women 16-34/women 18-27 Jan-16 (526/188/137), Jan-15 (651/288/221/57), Jan-14 (700/330/273/93), Jan-13 (702/278/215/78), Jan-12 (724/334/258/88), Jan-11 (700/306), Jan-10 (712/392), Jan-09 (702/347), Jan-08 (703/386), Mar-07 (603/288), Sep-06 (401/172), Jan-06 (603/238), Sep-05 (402/182), Mar-05 (603/294), Oct-04 (566/267), Feb-04 (601/298), Nov-03 (603/258), Aug-03 (605/263)

After 2am (typically the busiest time for unbooked minicab use), usage has also dropped to its lowest level and now stands at less than one per cent

Unbooked minicab use by time of venue departure



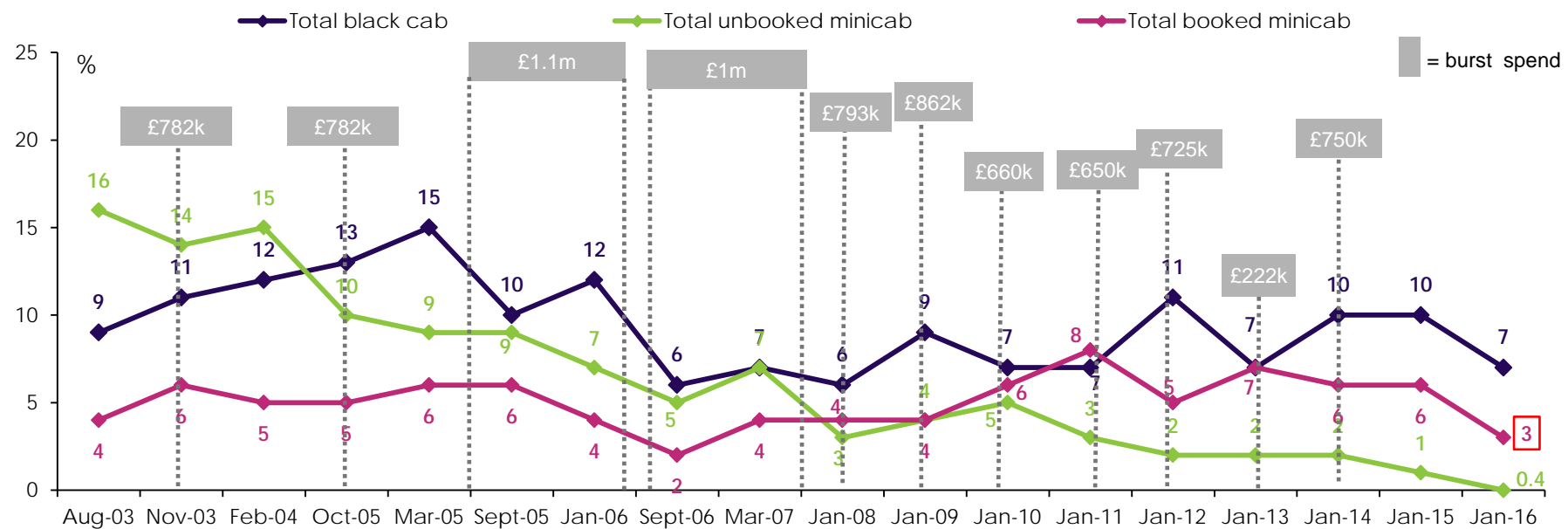
No significant differences with Jan-15

Q5a/b What form of transport did you use to get to your next destination when you left [venue]?

Base all respondents/leaving the venue 12am-2am/after 2am: Jan-16 (526/128/227), Jan-15 (651/185/243), Jan-14 (700/234/272), Jan-13 (702/179/231), Jan-12 (724/180/217), Jan-11 (700/210/251), Jan-10 (721/205/205), only base shown for all respondents, other unknown, Jan-09 (702), Jan-08 (703), March-07 (603), Sept-06 (401), Jan-06 (603), Sept-05 (402), Mar-05 (603), Oct-04 (566), Feb-04 (601), Nov-03 (603), Aug-03 (605)

The split by type of cab used is at a similar level to last year, with black cabs remaining the most popular choice

Overall cab share



3 Significantly lower than Jan-15

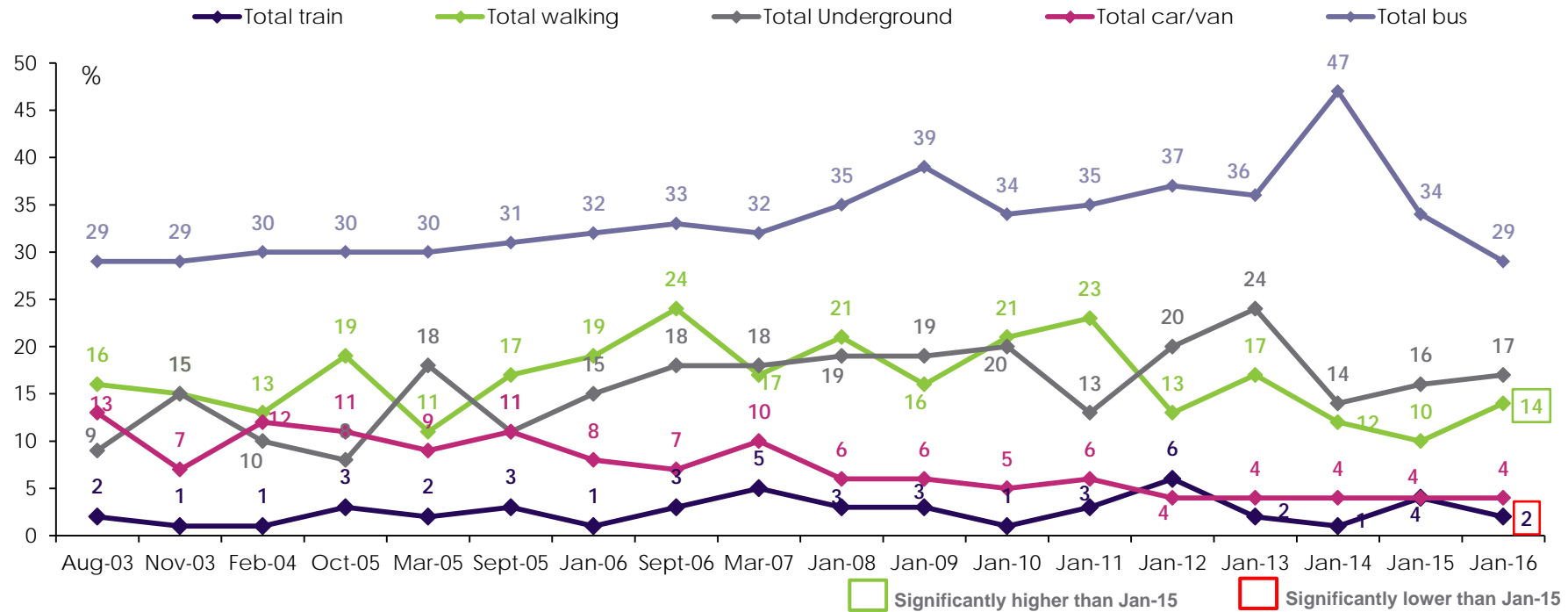
Q5a/b What form of transport did you use to get to your next destination when you left [venue]?

Base: All respondents Jan-16 (526), Jan-15 (651), Jan-14 (700), Jan-13 (702), Jan-12 (724), Jan-11 (700), Jan-10 (712), Jan-09 (702), Jan-08 (703), Mar-07 (603), Sep-06 (401), Jan-06 (603), Sep-05 (402), Mar-05 (603), Oct-04 (566), Feb-04 (601), Nov-03 (603), Aug-03 (605)



This year sees a significant increase in walking to get to the next destination, while use of trains has halved to two per cent and bus usage has fallen from the Jan 2014 peak

Other modes of transport used when leaving venue



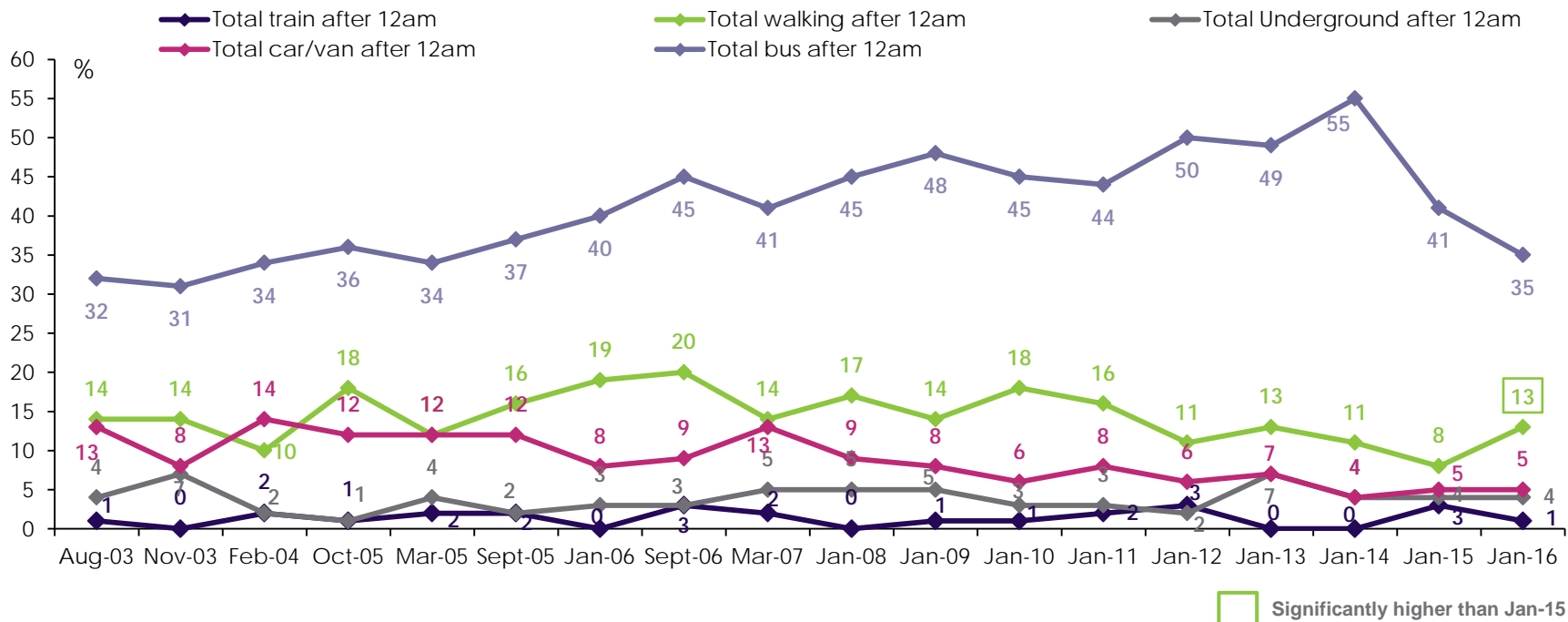
Q5a/b What form of transport did you use to get to your next destination when you left [venue]?

Base: All respondents Jan-16 (526), Jan-15 (651), Jan-14 (700), Jan-13 (702), Jan-12 (724), Jan-11 (700), Jan-10 (712), Jan-09 (702), Jan-08 (703), Mar-07 (603), Sep-06 (401), Jan-06 (603), Sep-05 (402), Mar-05 (603), Oct-04 (566), Feb-04 (601), Nov-03 (603), Aug-03 (605)



Walking from the venue to next destination after midnight has also risen significantly this year

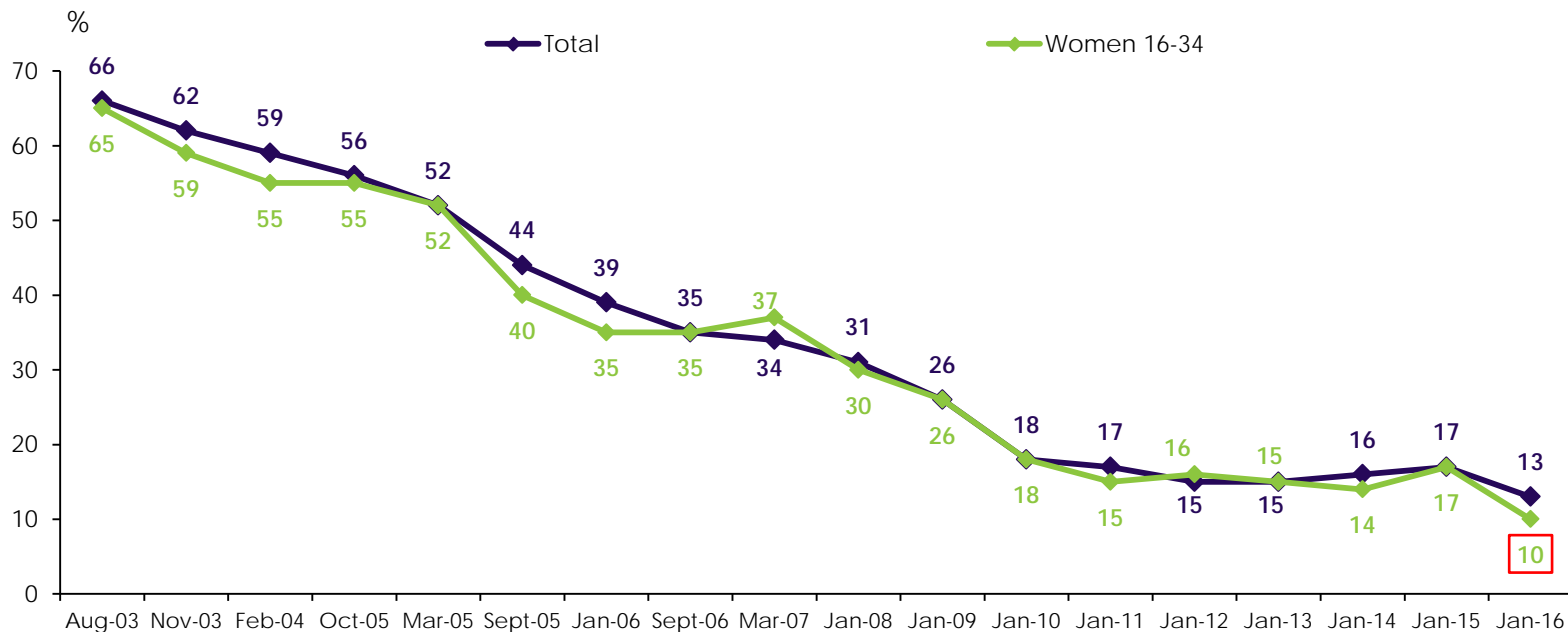
Other modes of transport used when leaving venue after 12am (total)



Q5a/b. Base leaving the venue after 12am: Jan-16 (355), Jan-15 (428), Jan-14 (506), Jan-13 (410), Jan-12 (397); Jan-11 (461), Jan-10 (410), Jan-09 (409), Jan-08 (367), March-07 (364), Sept-06 (264), Jan-06 (392), Sept-05 (288), Mar-05 (453), Oct-04 (460), Feb-04 (540), Nov-03 (473), Aug-03 (485)

This year, significantly fewer women aged 16-34 said they were approached by a tout compared to 2015

Proportion approached by touts on night of interviewing



For women aged 18-27, 9% were approached by a tout

10 Significantly lower than Jan-15

Q15 Just to check, were you approached by a driver to see if you wanted a minicab or taxi at any stage after you'd left the venue?
 Base all respondents/all women 16-34: Jan-16 (526/188), Jan-15 (651/288), Jan-14 (700/330), Jan-13 (702/278), Jan-12 (722/332); Jan-11 (700/306), Jan-10 (712/392), Jan-09 (702/347), Jan-08 (703/386), Mar-07 (603/288), Sep-06 (401/172), Jan-06 (603/238), Sep-05 (402/182), Mar-05 (603/294), Oct-04 (566/267), Feb-04 (601/298), Nov-03 (603/258), Aug-03 (605/263)



Use of unbooked minicabs

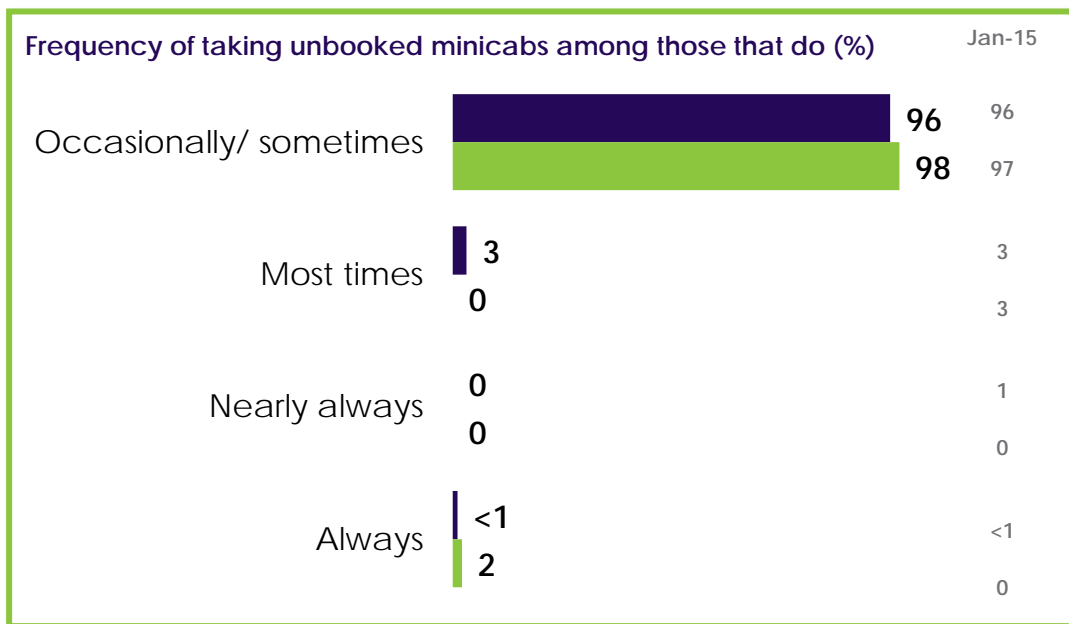
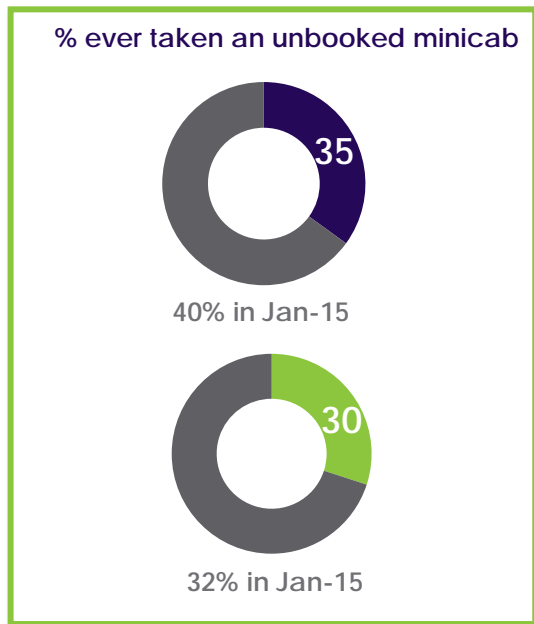
Current and future behaviour

The proportions of the total and target samples that have ever used an unbooked minicab is in line with the levels reported in 2015

Frequency of taking an unbooked minicab

No significant differences with Jan-15

■ Total ■ Women 16-34



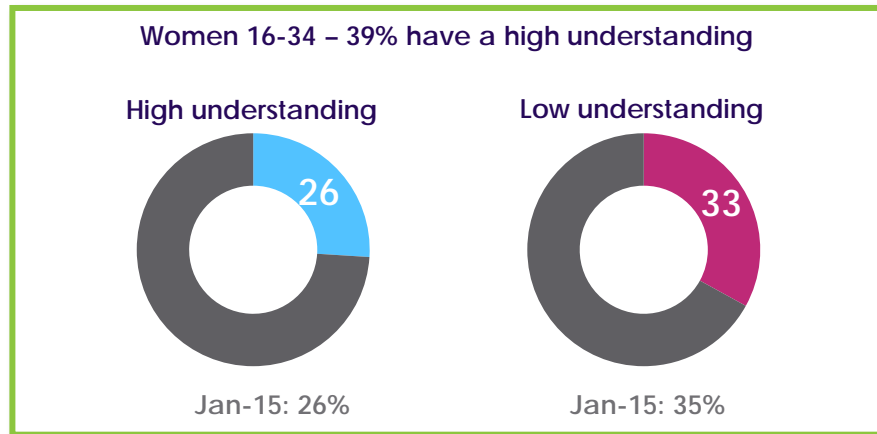
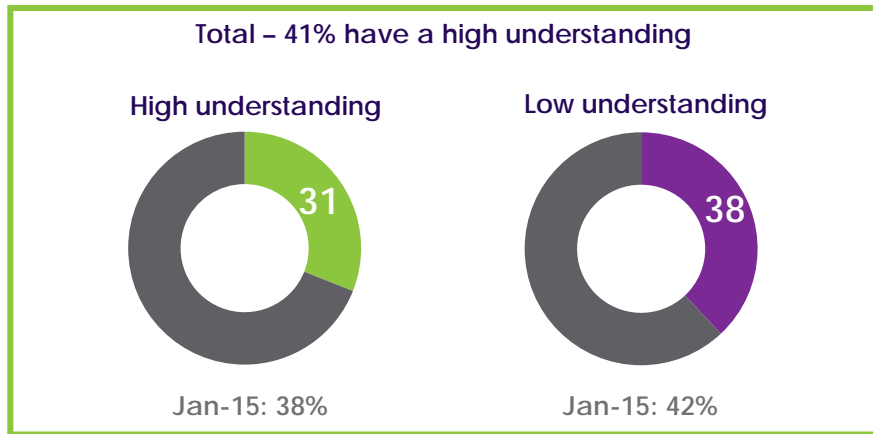
Q24a Can you tell me if you have ever taken a minicab without having booked it? Base: all respondents/all women 16-34 Jan-16 (526/188), Jan-15 (651/288)

Q24b Can you tell me how often you take a minicab without having booked it? Base: all respondents/all women 16-34 who have taken an unbooked minicab excl DKs + never: Jan-16 (144/44*), Jan-15 (264/92) *caution – low base size

Those with a greater understanding of the regulations remain less likely to have ever taken an unbooked minicab

Effect of regulation understanding on unbooked minicab use

% of total sample ever taken an unbooked minicab (by high or low understanding of minicab regulations)



Respondents were read six statements relating to minicab regulations (e.g. 'Minicabs are allowed to pick up customers who email to book them'), 3 of which were true and 3 false

High understanding is shown when respondents correctly identify (at least) all the false statements about illegal minicab activity
Low understanding is shown by respondents not able to identify all of the false statements correctly

Q24a Can you tell me if you have ever taken a minicab without having booked it?

No significant differences with Jan-15

Base: all with a high understanding/ all with a low understanding/all women 16-34 with a high understanding /all women 16-34 with a low understanding : Jan-16 (215/311/73/115), Jan-15 (286/365/85/139)

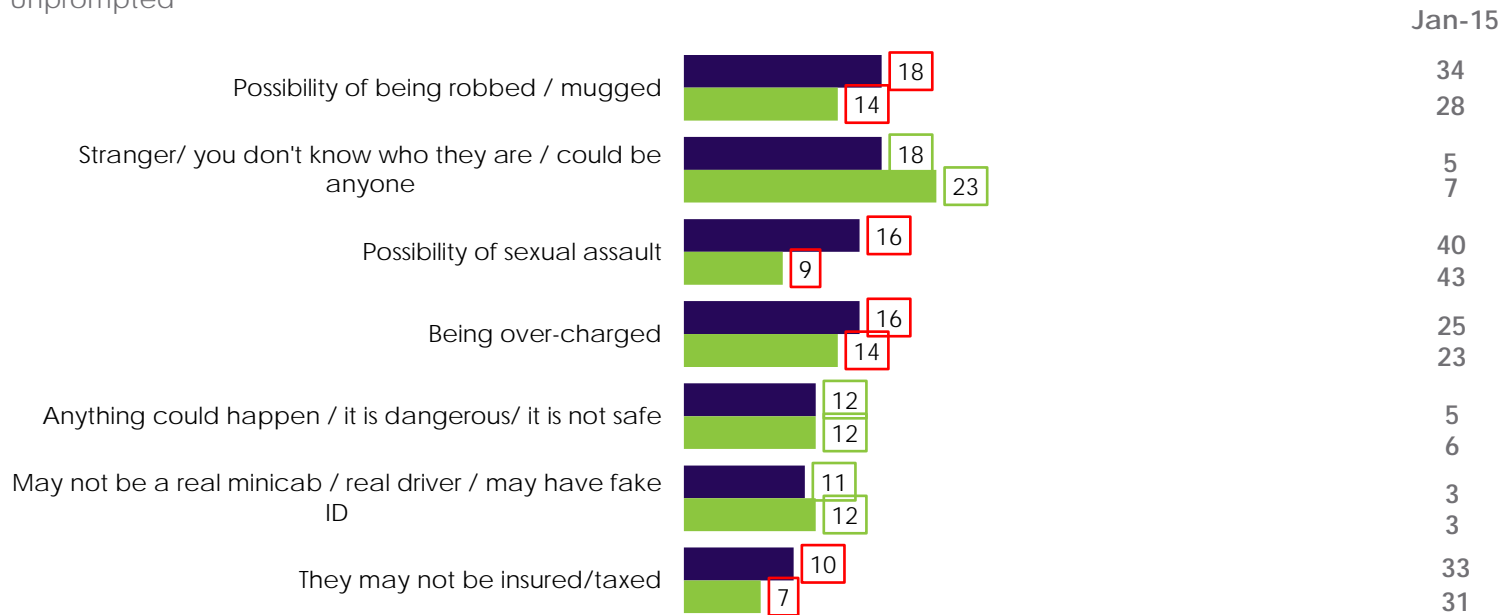
Concerns about the authenticity of minicab drivers appear to be more prevalent this year. Fears about sexual assault, being robbed or uninsured drivers have all declined

Perceived dangers of unbooked minicabs

Dangers of taking unbooked minicabs (%)

■ Total ■ Women 16-34

Unprompted



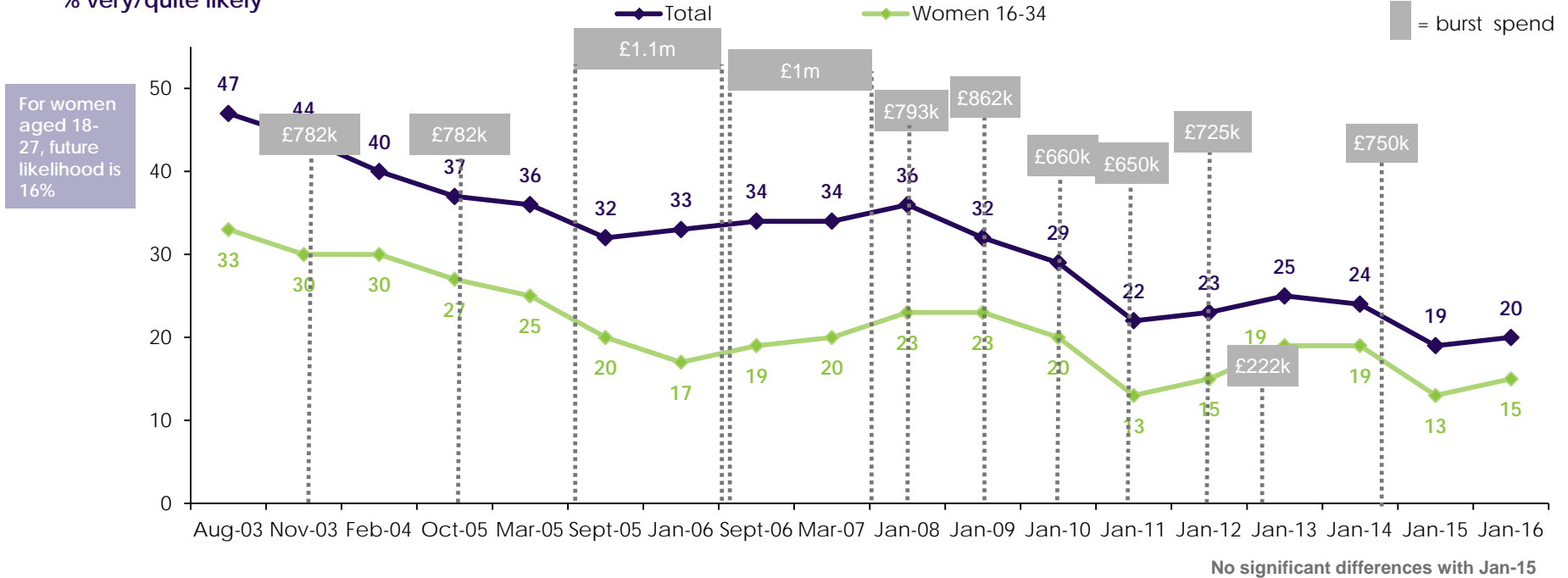
Q24d What, if anything, do you think are the dangers in taking a minicab without booking it?
 Base: all respondents /all women 16-34 Jan-16 (526/188), Jan-15 (651/288)

□ Significantly higher than Jan-15 □ Significantly lower than Jan-15

Propensity to use an unbooked minicab in the future has remained low for both the total and target samples

Likelihood of using an unbooked minicab in the future

% very/quite likely



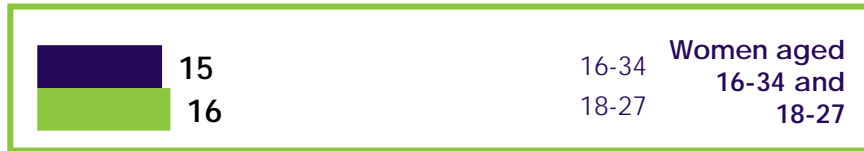
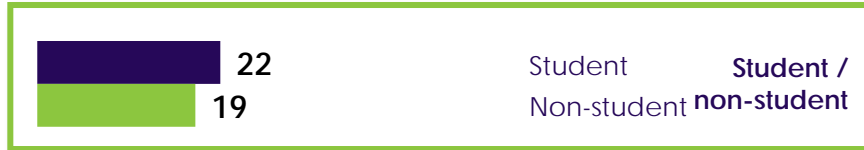
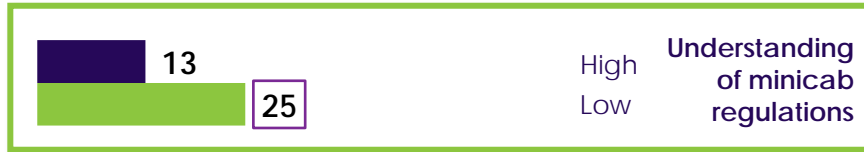
Q23 Minicab drivers are actually not allowed to pick up passengers unless they have booked...how likely are you to use a minicab that you have not booked in the future? Base: (all respondents/women 16-34/women 18-27/all 18-19) Jan-16 (526/188/137), Jan-15 (651/288/53), Jan-14 (700/330/273/93), Jan-13 (702/278/215/78)Jan-12 (724/334/258), Jan-11 (700/306), Jan-10 (721/392), Jan-09 (702/347), Jan-08 (703/386, March-07 (603/288), Sept-06 (401/172), Jan-06 (603/238), Sept-05 (402/182), Mar-05 (603/294), Oct-04 (566/267), Feb-04 (601/298), Nov-03 (603/258), Aug-03 (605/263)

Men, those with lower understanding of regulations and those who have always felt safe in an unbooked minicab are significantly more likely to use one in future

Likelihood of using an unbooked minicab in the future

 Significantly higher than pairing

% very/quite likely to use an unbooked minicab in the future



Q23 Minicab drivers are actually not allowed to pick up passengers unless they have booked...how likely are you to use a minicab that you have not booked in the future? Base: men/women (305/216), high/low understanding (215/311), student/non-student (115/403), women 16-34/18-27 (188/137), used/not used Cabwise (12/502), white/BAME (378/127), felt unsafe/not felt unsafe (63/462), go out at least once a week in West End/outside of West End (221/209)



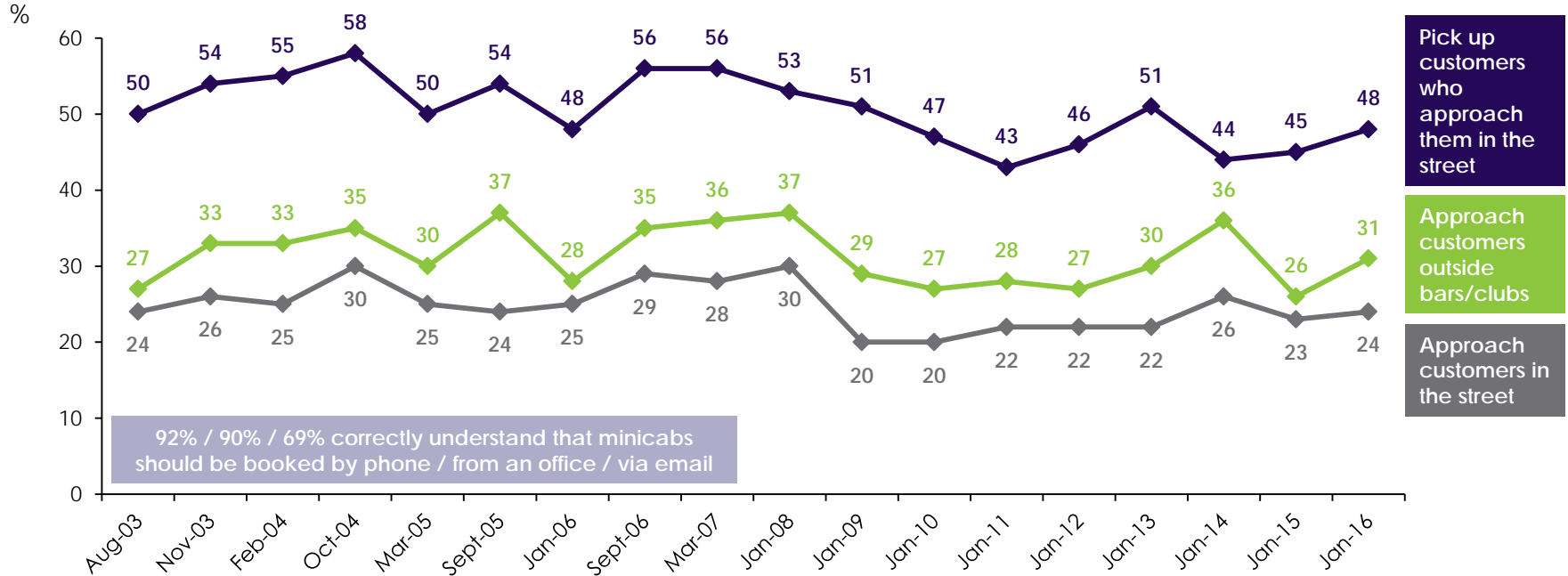
Perceptions around unbooked minicabs

The target sample's understanding of illegal minicab behaviour is largely in line with last year

Incorrect beliefs over minicab rules and regulations (women 16-34)

No significant differences with Jan-15

Minicabs are allowed to...



Q21 I'm now going to read out a number of statements about minicabs in London and I'd like you to tell me whether you think each one is true or false...

Base: all women 16-34: Jan-16 (188), Jan-15 (288), Jan-14 (330), Jan-13 (278), Jan-12 (334), Jan-11 (306), Jan-10 (392), Jan-09 (375), Jan-08 (413), March-07 (311), Sept-06 (183), Jan-06 (256), Sept-05 (195), Mar-05 (311), Oct-04 (281), Feb-04 (308), Nov-03 (279), Aug-03 (277)

Lack of other available options is the main reason that the target sample use unbooked minicabs, while fear for their safety continues to be the main reason for not using them

Reasons for and against taking unbooked minicabs

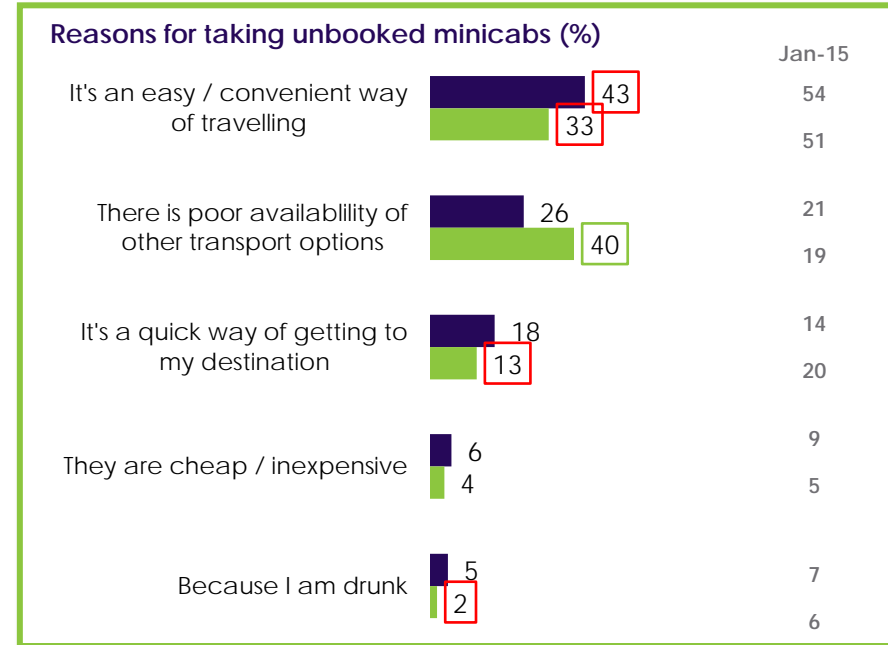
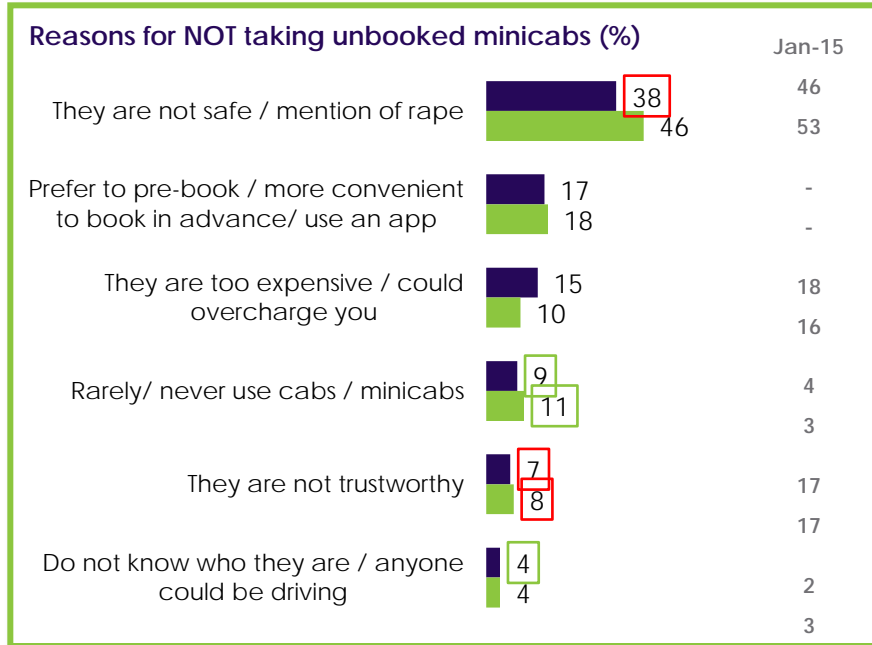
 Significantly higher than Jan-15
 Significantly lower than Jan-15

Unprompted

■ Total

■ Women 16-34

Unprompted

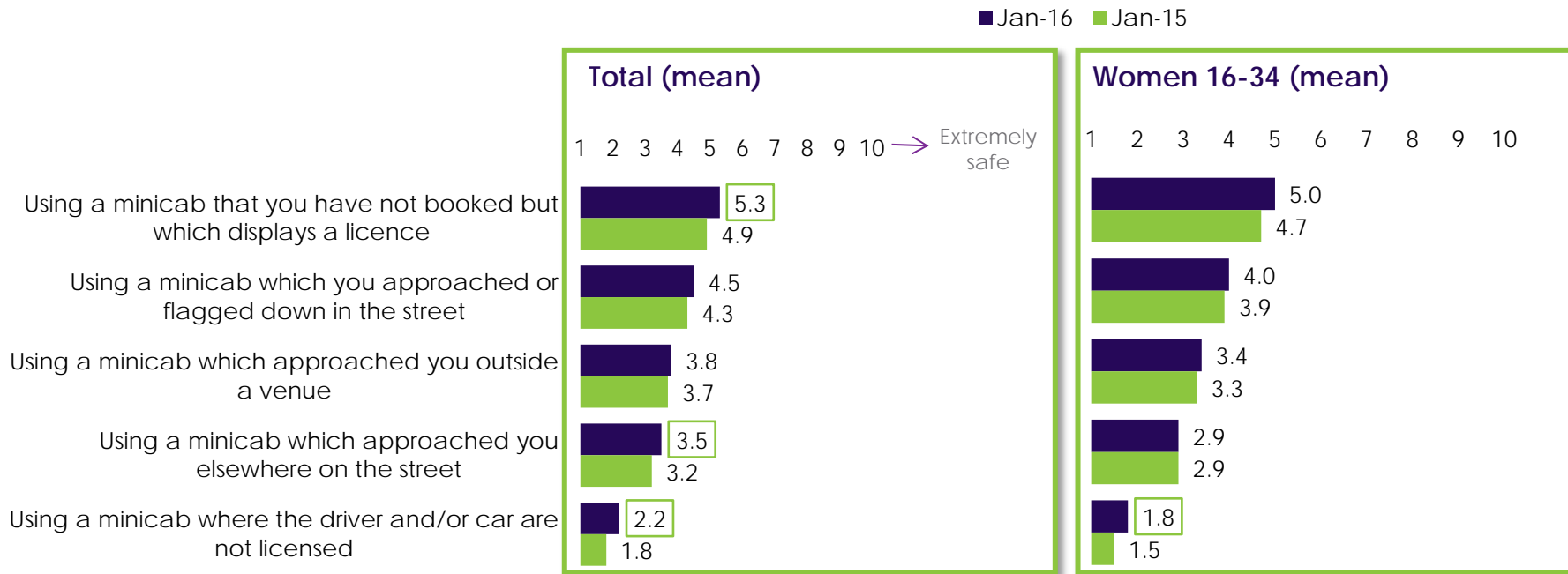


Q24a1 Can you tell me why you never take a minicab which isn't booked? Base: all respondents/all women 16-34 who have never used an unbooked minicab (Jan-16: (373/141), (Jan-15: 410/206) Q24b2 Why do you take a minicab without booking it? Base: all respondents/all women 16-34 who have used an unbooked minicab (Jan-16: 144/44), (Jan-15: 234/80)

Worryingly, taking booked minicabs without licences, minicabs approaching them in the street and minicabs / cab drivers that aren't licensed are more likely to be considered safe (than last year)

Safety perceptions of minicab behaviour

How safe do you think it is...where 1 is not at all safe and 10 is extremely safe



Q22 Can you tell me how safe you think each of the different travel option is?

Q24c Can you tell me how safe you think it is to use a minicab that you have not booked but which displays a licence?

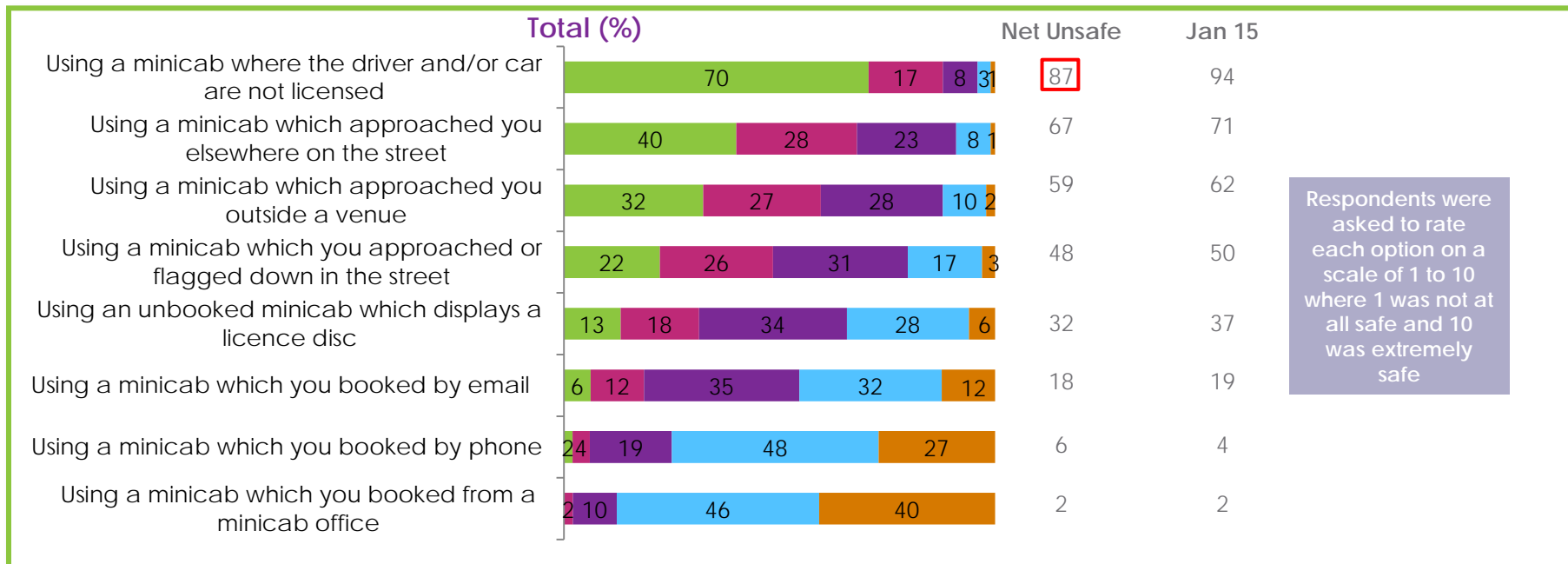
Base: all respondents/women 16-34 (Jan-16: 526/138), (Jan-15: 651/288)

Significantly higher than Jan-15

This year sees a decrease in the perceived risk of taking minicabs that are not licensed

Perceived safety of using minicabs (total)

■ Not at all safe (1 & 2)
 ■ Quite unsafe (3 & 4)
 ■ Neither safe nor unsafe (5 & 6)
 ■ Quite safe (7 & 8)
 ■ Extremely safe (9 & 10)



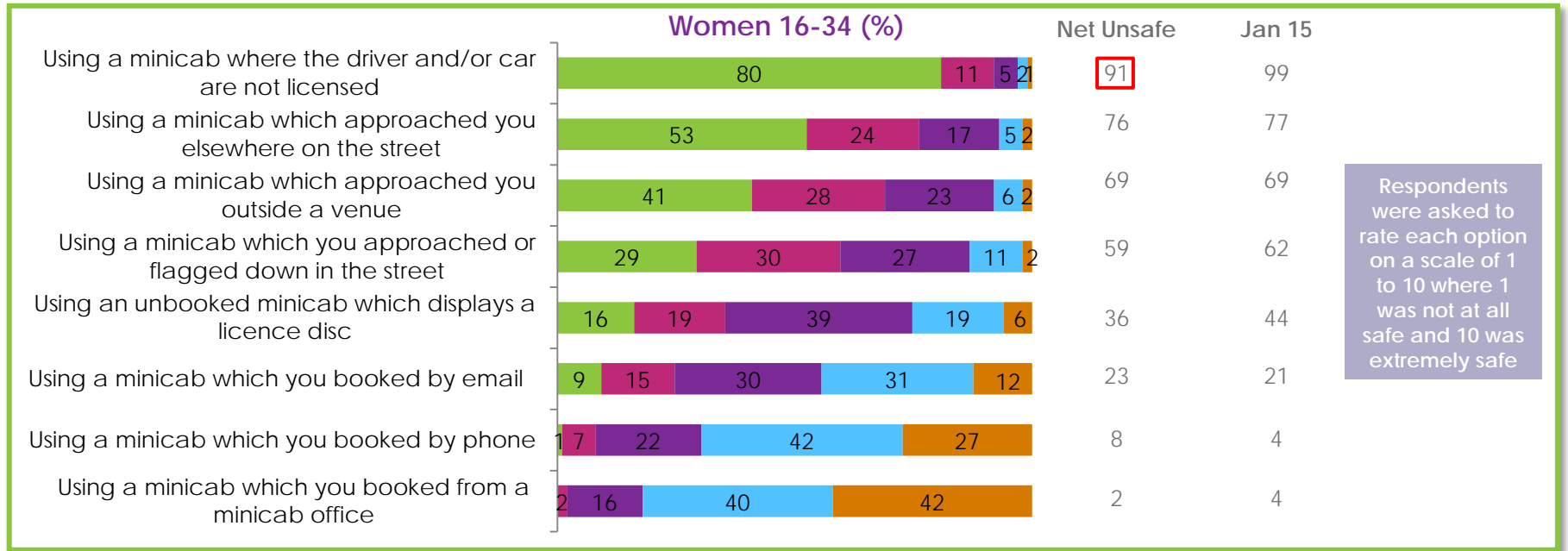
Q22/24c I'm going to read out a list of different travel options and I'd like you to tell me how safe you think each one is
 Base: All respondents Jan-16 (526), Jan-15 (651)

 Significantly lower than Jan-15

Women aged 16-34 are also less likely to perceive unlicensed cabs/cab drivers to be unsafe this year

Perceived safety of using minicabs (women 16-34)

■ Not at all safe (1 & 2)
 ■ Quite unsafe (3 & 4)
 ■ Neither safe nor unsafe (5 & 6)
 ■ Quite safe (7 & 8)
 ■ Extremely safe (9 & 10)



Q22/24c I'm going to read out a list of different travel options and I'd like you to tell me how safe you think each one is
 Base: All women 16-34 Jan-16 (188), Jan-15 (288)

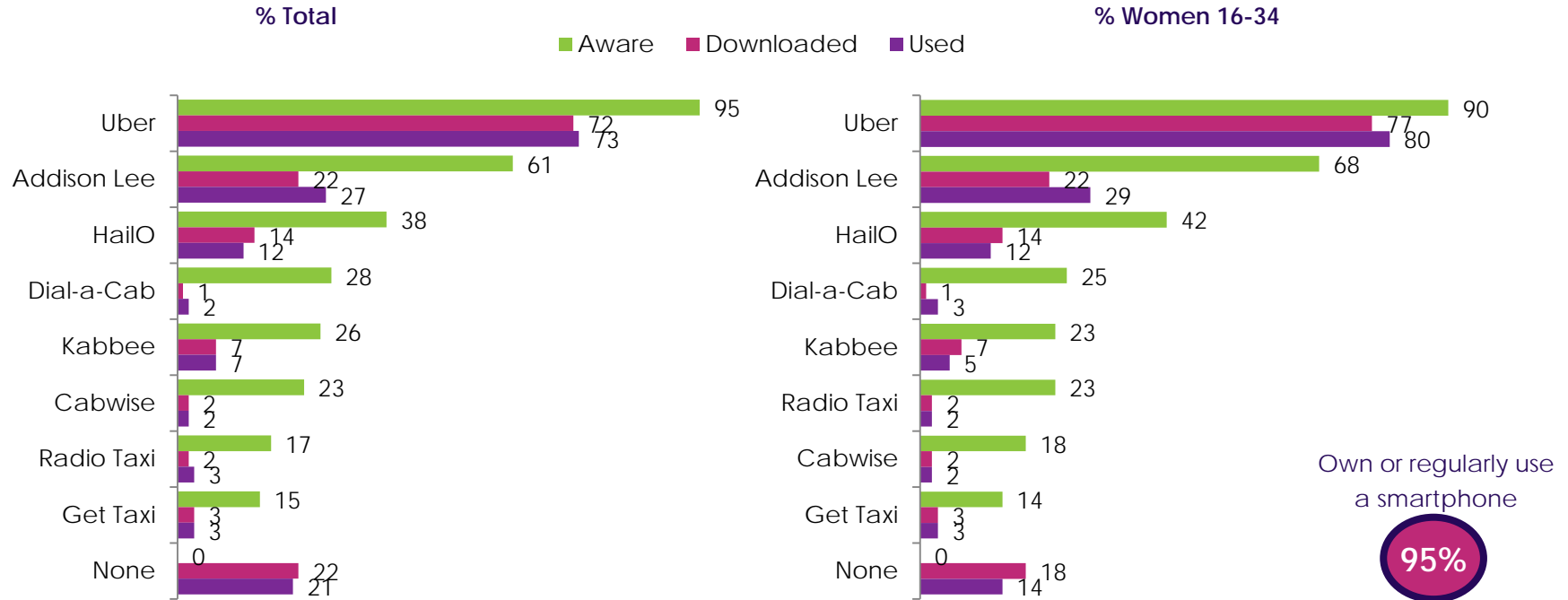
 Significantly lower than Jan-15

Cabwise and other apps



Uber is by far the most well-known and the most used app for minicab bookings among both the total and target samples

Awareness and usage of minicab booking apps



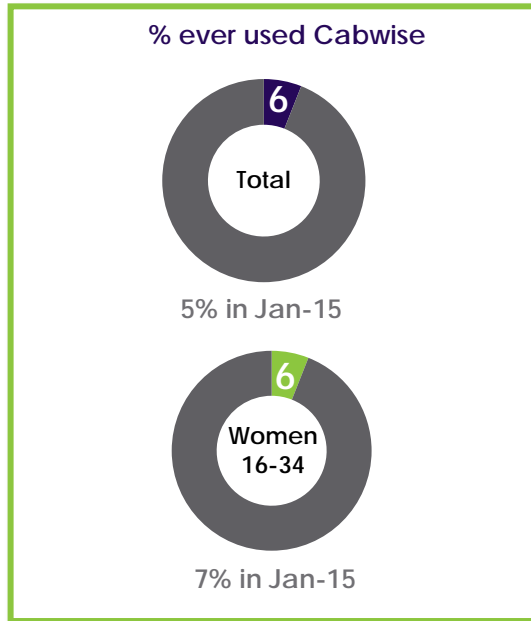
QA1 Do you own or regularly use a smartphone? Base: All respondents/women 16-34 (526/188)

QA2/A3 Which of the following mobile phone apps, that help you book taxis and minicabs, have you heard of before today? Base: All respondents/women 16-34 (526/188)

Use of Cabwise has remained static among both the total and target samples

Use of Cabwise

No significant differences with Jan-15



Frequency of Cabwise text service use

**Total
(12 people)**

8 rarely use it
1 uses it not very often
2 sometimes use it
1 always uses it

**Women 16-34
(3 people)**

2 rarely use it
1 uses it not very often

Q34 Can you tell me if you have used the Cabwise text service Base: all respondents (526), all women 16-34 (188)

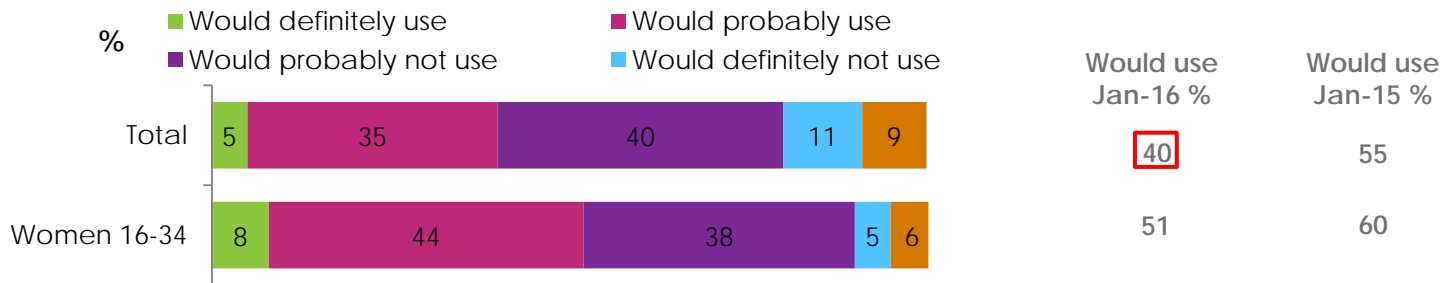
Q36 And can you tell me how often you use the Cabwise service when you go out in London? Base: all respondents who have used Cabwise – excluding don't knows (12*), all women 16-34 who have used Cabwise (3*) *Caution – very low base sizes

The proportion of the total sample saying they would use Cabwise in the future has fallen significantly again this year

Satisfaction with, and future use of, Cabwise

 Significantly lower than Jan-15

Likelihood to use Cabwise in future



Satisfaction with Cabwise

Total (30 people)

10 very / quite satisfied
 1 neither nor
 1 very / quite dissatisfied
 18 don't know / can't remember

Women 16-34 (11 people)

2 very / quite satisfied
 1 neither nor
 1 very / quite dissatisfied
 7 don't know / can't remember

Q36a Thinking about the last time you used Cabwise, can you tell me how satisfied you were with the service overall? Base: all respondents/women 16-34 who have used Cabwise, Jan-16 (30/11), Jan-15 (34/21), Jan-14 (75/31). Q40 How likely do you think you would be to use the Cabwise service in the future? Base: all respondents/women 16-34 Jan-16 (526/188), Jan-15 (651/288)

*Low base sizes for sat. with Cabwise

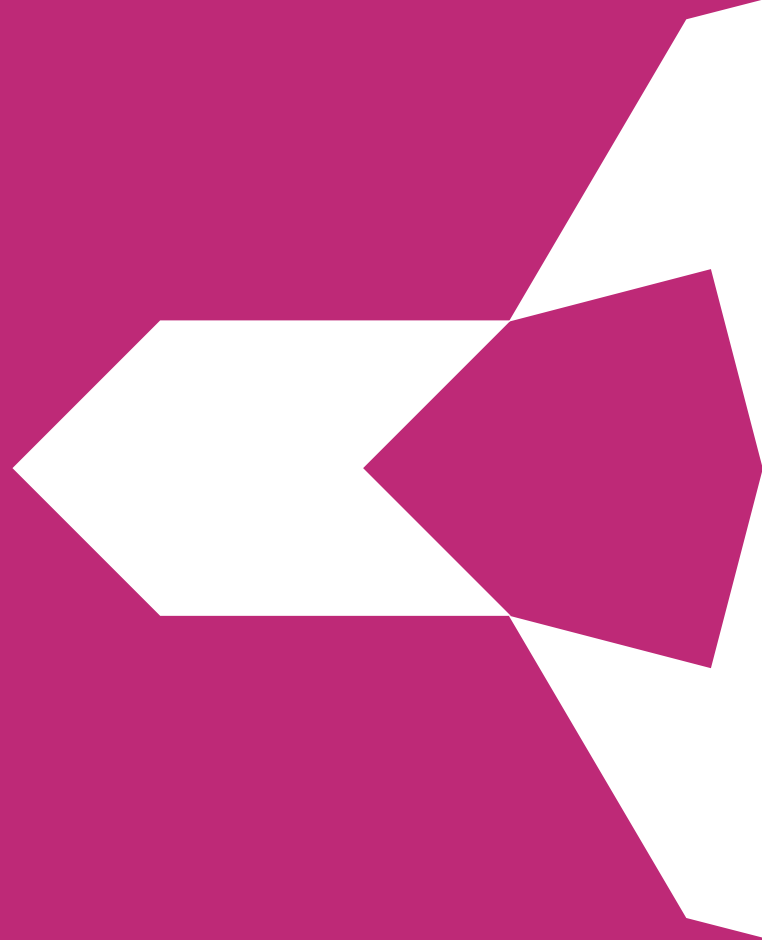


Conclusions

Conclusions

- The market share for unbooked minicabs has continued to fall in 2016 – no women aged 16-34, and less than one per cent overall took an unbooked minicab home after a night out this wave
- A decrease in touting levels could potentially help to explain this decreased use of unbooked minicabs, with significantly fewer women aged 16-34 saying that they were approached by a tout on the night of recruitment
- Concerns about the authenticity of unbooked minicab drivers appear to more prevalent this year, while fears about sexual assault, being robbed / mugged or uninsured drivers are lower compared to last year
- Misconceptions around minicab regulations do persist though, with substantial proportions incorrectly believing that it is okay for minicabs to pick up customers who approach them in the street, to approach customers outside bars / clubs or to approach customers in the street
 - Worryingly, there has been a decrease in the perceived risk of taking minicabs that are not licenced (and amongst the target group of women aged 16-34)
- While buses continue to be the main mode used when leaving a venue, this year has seen a significant increase in respondents walking from venues to get to their next destination
 - Additionally, it is likely that the Underground's market share will increase substantially when the Night Tube service begins later this year
- Just a quarter are aware of Cabwise and use remains very low (two per cent). Uber is by far the most well-known and most used minicab booking app.

Appendix



Overall, the use of unbooked minicabs has reached a new lowest level, at less than one per cent

Key metrics for total sample

Measure	Question	Aug 03	Nov 03	Feb 04	Oct 04	Mar 05	Sep 05	Jan 06	Sep 06	Mar 07	Jan 08	Jan 09	Jan 10	Jan 11	Jan 12	Jan 13	Jan 14	Jan 15	Jan 16
Unbooked minicabs																			
Unbooked minicab share	Q5a/b & Q12a/b	16%	14%	15%	10%	9%	9%	8%	5%	7%	3%	4%	5%	3%	2%	2%	2%	1%	<1%
Future likelihood to use unbooked minicab	Q23 Net: likely	47%	44%	40%	37%	36%	32%	33%	34%	34%	36%	32%	29%	22%	23%	25%	24%	19%	20%

 Significantly higher than Jan-15

Base: All respondents Jan-16 (526), Jan-15 (651), Jan-14 (700), Jan-13 (702), Jan-12 (724), Jan-11 (700), Jan-10 (721), Jan-09 (702), Jan-08 (703), Mar-07 (603), Sep-06 (401), Jan-06 (603), Sep-05 (402), Mar-05 (603), Oct-04 (566), Feb-04 (601), Nov-03 (603), Aug-03 (605)

None of the target sample took an unbooked minicab on the night of recruitment

Key metrics for target sample

Measure	Question	Aug 03	Nov 03	Feb 04	Oct 04	Mar 05	Sep 05	Jan 06	Sep 06	Mar 07	Jan 08	Jan 09	Jan 10	Jan 11	Jan 12	Jan 13	Jan 14	Jan 15	Jan 16
Unbooked minicabs																			
Unbooked minicab share	Q5a/b & Q12a/b	19%	14%	16%	6%	7%	8%	8%	3%	5%	4%	5%	5%	3%	4%	2%	2%	<1%	0%
Future likelihood to use unbooked minicab	Q23 Net: likely	33%	30%	30%	27%	25%	20%	17%	19%	20%	23%	23%	20%	13%	15%	19%	19%	13%	15%

Significantly higher than Jan-15

Base: All women 16-34 Jan-16 (188), Jan-15 (288), Jan-14 (330), Jan-13 (278), Jan-12 (334), Jan-11 (306), Jan-10 (392), Jan-09 (347), Jan-08 (386), Mar-07 (288), Sep-06 (172), Jan-06 (238), Sep-05 (182), Mar-05 (294), Oct-04 (267), Feb-04 (298), Nov-03 (258), Aug-03 (263)

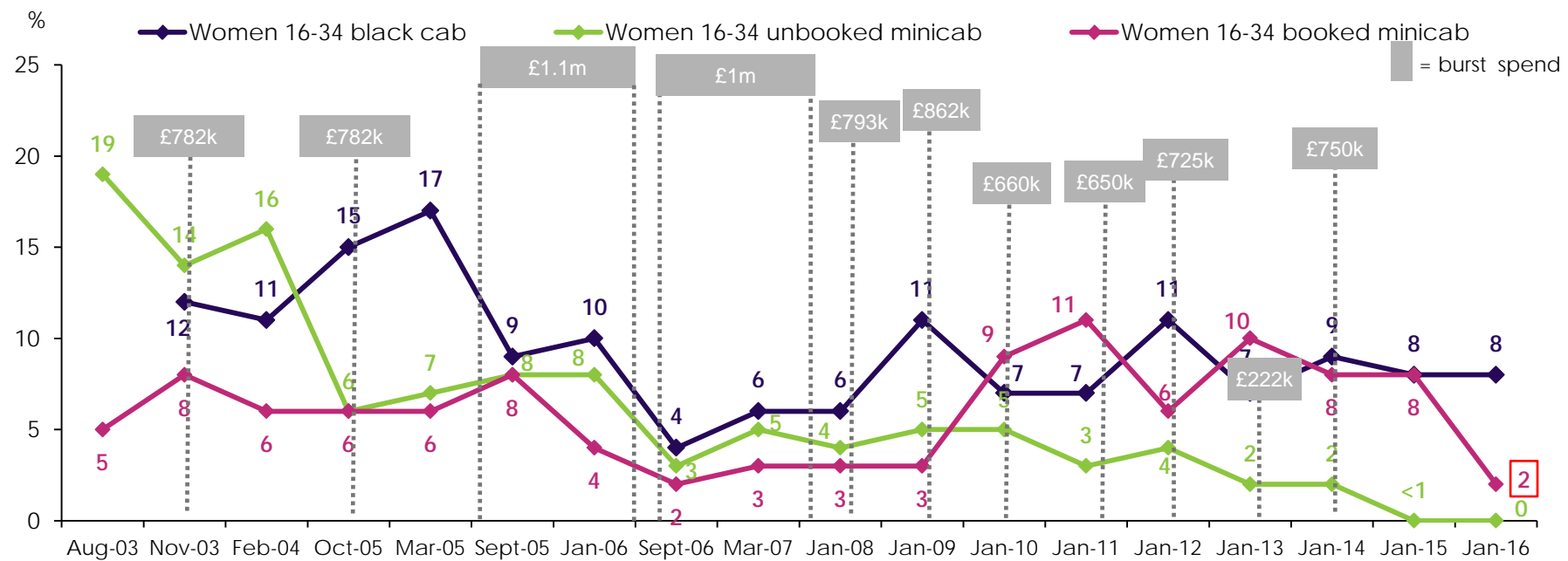


Methodology

- The methodology used was a replication of the previous research conducted
- The research comprised a face-to-face recruitment stage, from which 526 interviews were completed with recruited individuals over the telephone
- Recruitment took place at 20 late night venues. The venues were split between the West End and other areas (Brixton, Camden, Clapham, Shoreditch)
- Permission to interview was secured from the venues in advance
- Recruiters secured a total of 2,586 face-to-face interviews
- No specific quotas were set for the recruitment other than to reflect the profile of individuals entering each venue
- Respondents were contacted by telephone within one-two weeks of being recruited
- The telephone interview took approximately 12 minutes to complete
- A 50:50 split was achieved with individuals recruited in the West End and in other areas
- The final data set was weighted back to the recruitment profile (in terms of day of the week recruited and area of recruitment) reflecting earlier methodologies used
- All fieldwork took place between 6 January and 13 March 2015

Use of booked minicabs among the target sample has fallen significantly this year

Overall cab share (women 16-34)



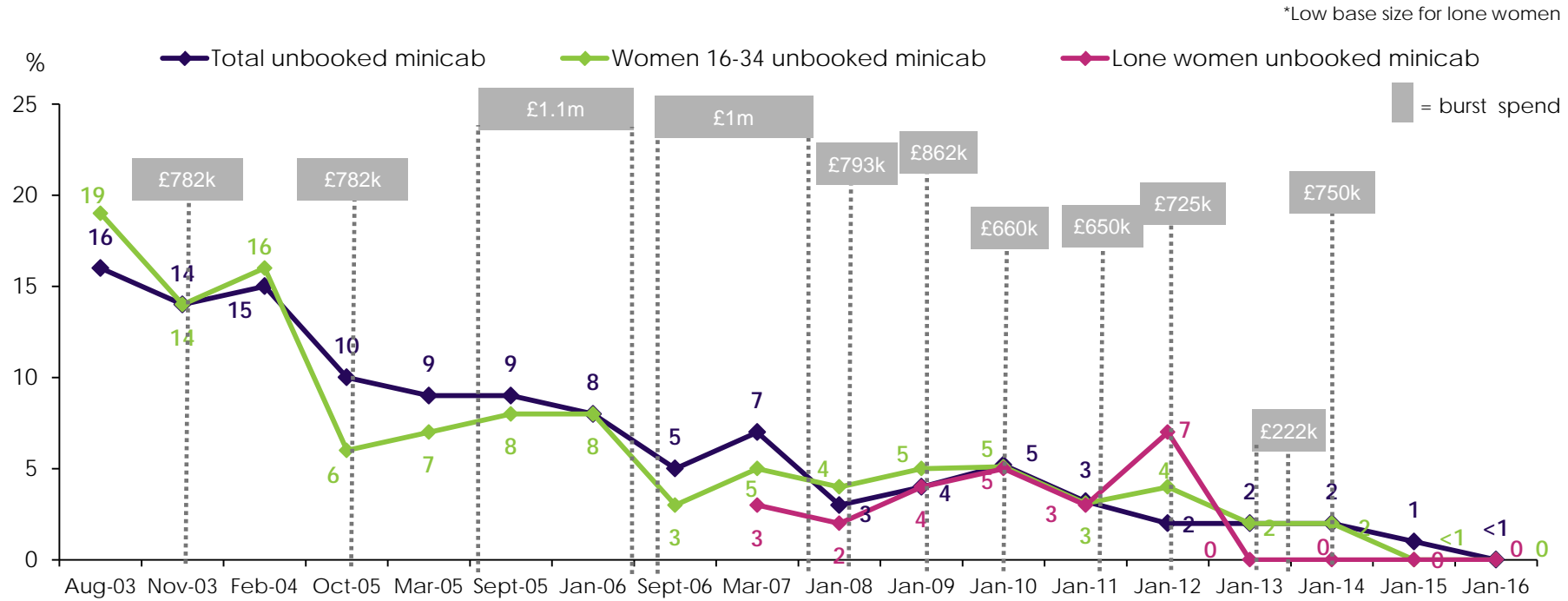
Q5a/b What form of transport did you use to get to your next destination when you left [venue]?

Base women 16-34: Jan-16 (188), Jan-15 (288), Jan-14 (330), Jan-13 (278), Jan-12 (334); Jan-11 (306), Jan-10 (392), Jan-09 (347), Jan-08 (386), Mar-07 (288), Sep-06 (172), Jan-06 (238), Sep-05 (182), Mar-05 (294), Oct-04 (267), Feb-04 (298), Nov-03 (258), Aug-03 (263)

2 Significantly lower than Jan-15

Total unbooked minicab share has fallen below one per cent. Use of unbooked minicabs by the target sample and lone women is at zero this year

Unbooked minicab use when leaving venue



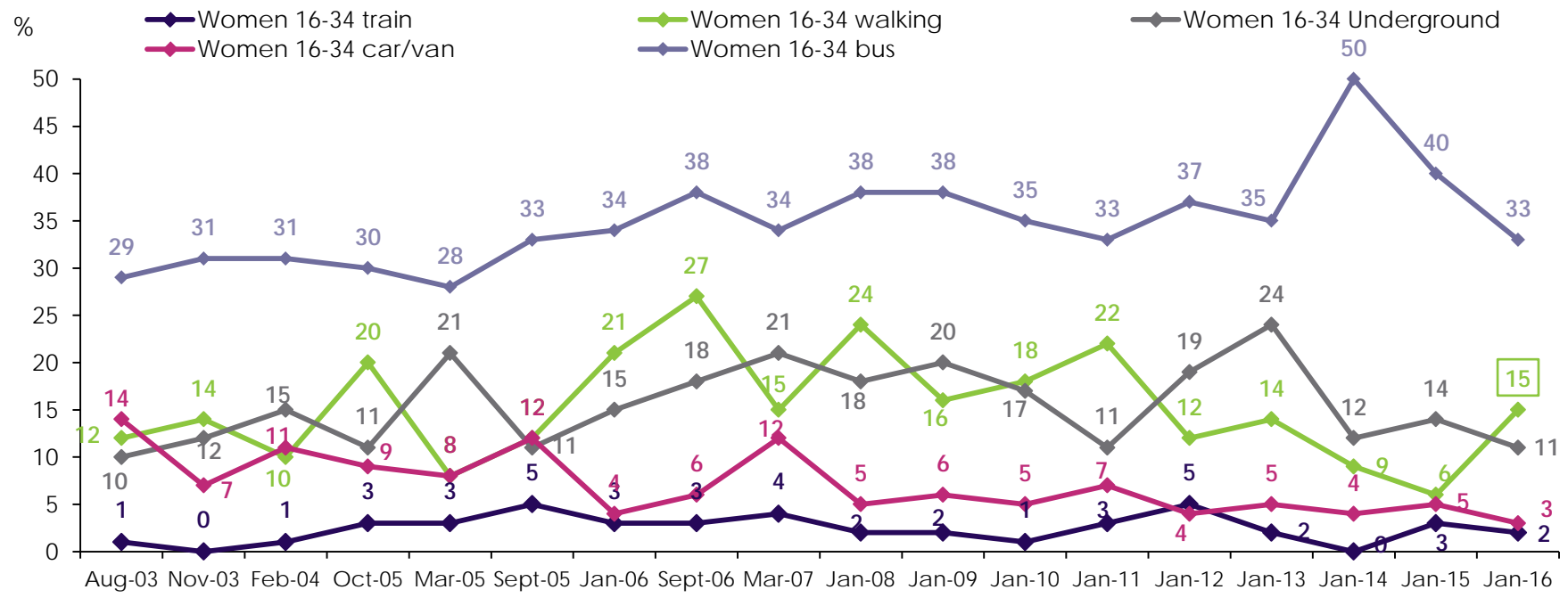
No significant differences with Jan-15

Q5a/b What form of transport did you use to get to your next destination when you left [venue]?
 Base: all respondents/women 16-34 /lone women Jan-16 (526/188/30), Jan-15 (651/288/65), Jan-14 (700/330/39), Jan-13 (702/278/42), Jan-12 (724/334/23); Jan-11 (700/306/28), Jan-10 (712/392/85), Jan-09 (702/347/79), Jan-08 (703/386/98), Mar-07 (603/288/65), Sep-06 (401/172), Jan-06 (603/238), Sep-05 (402/182), Mar-05 (603/294), Oct-04 (566/267), Feb-04 (601/298), Nov-03 (603/258), Aug-03 (605/263)



This year sees significantly more of the target sample walking from the venue to get to their next destination

Mode of transport used when leaving venue (women 16-34)



15 Significantly higher than Jan-15

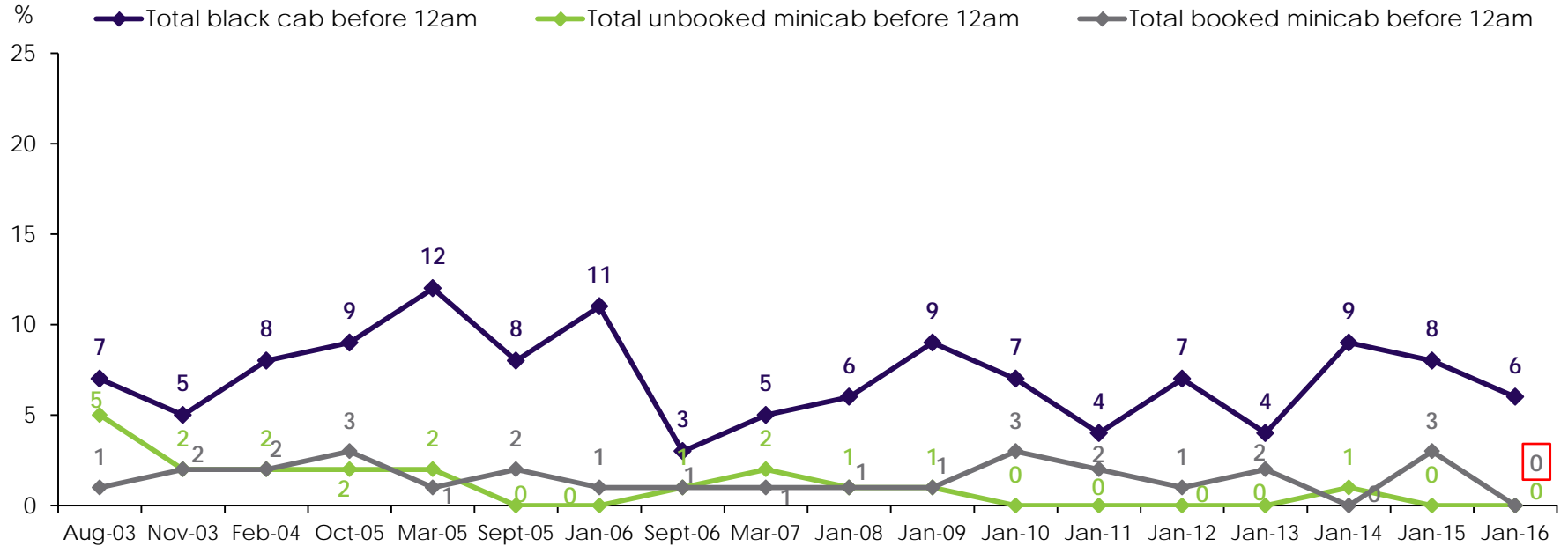
Q5a/b What form of transport did you use to get to your next destination when you left [venue]?

Base women 16-34: Jan-16 (188), Jan-15 (288), Jan-14 (330), Jan-13 (278), Jan-12 (334); Jan-11 (306), Jan-10 (392), Jan-09 (347), Jan-08 (386), Mar-07 (288), Sep-06 (172), Jan-06 (238), Sep-05 (182), Mar-05 (294), Oct-04 (267), Feb-04 (298), Nov-03 (258), Aug-03 (263)



After recovering last year, use of booked minicabs before midnight has fallen to zero again this year

Cab share before 12am (total)



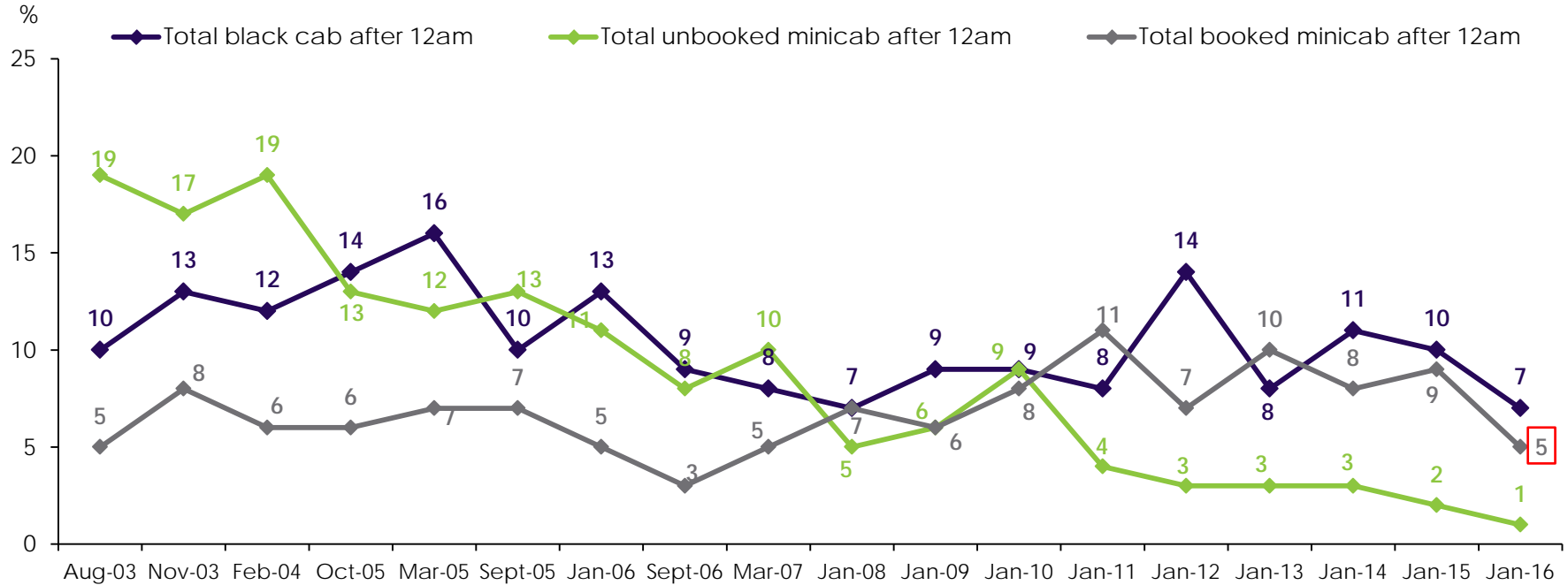
0 Significantly lower than Jan-15

Q5a/b What form of transport did you use to get to your next destination when you left [venue]?

Base leaving the venue before 12am: Jan-16 (147), Jan-15 (188), Jan-14 (151), Jan-13 (280), Jan-12 (307); Jan-11 (219), Jan-10 (303), Jan-09 (266), Jan-08 (320), March-07 (228), Sept-06 (132), Jan-06 (181), Sept-05 (101), Mar-05 (127), Oct-04 (132), Feb-04 (145), Nov-03 (121), Aug-03 (106)

Compared to last year, significantly fewer respondents said they took a booked minicab after midnight this year

Cab share after 12am (total)



5 Significantly lower than Jan-15

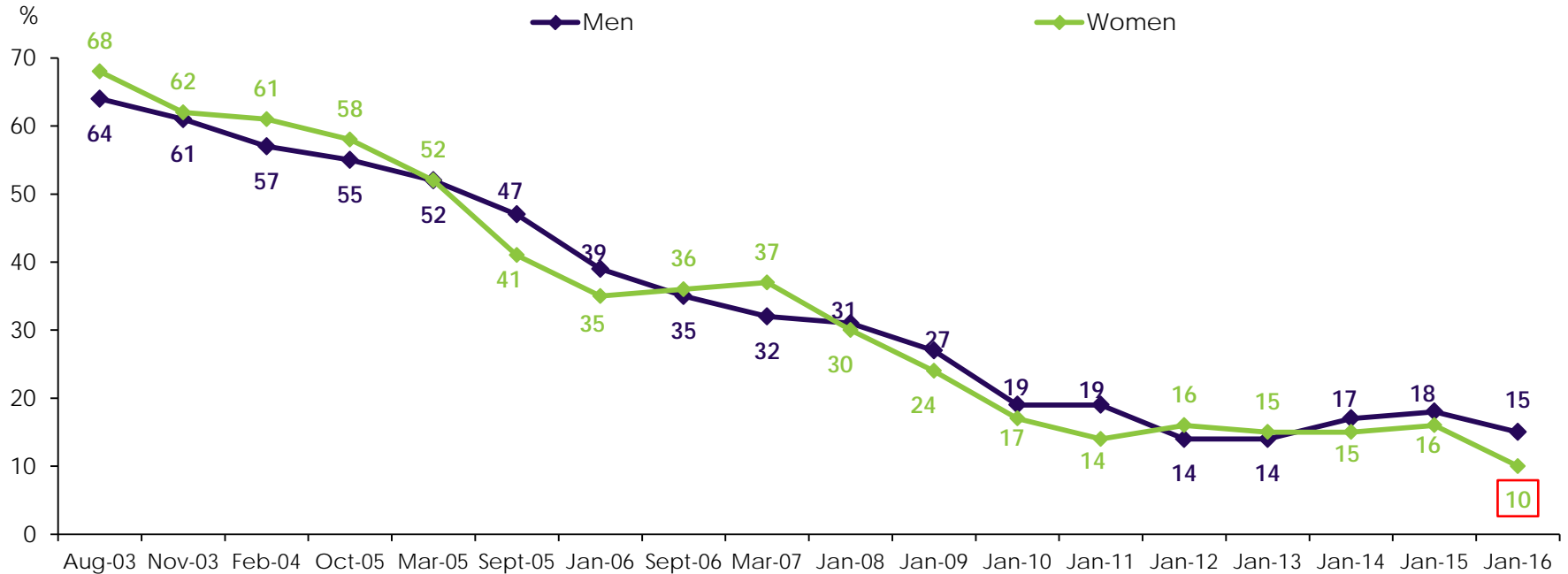
Q5a/b What form of transport did you use to get to your next destination when you left [venue]?

Base leaving the venue after 12am: Jan-16 (355), Jan-15 (428), Jan-14 (506), Jan-13 (410), Jan-12 (397); Jan-11 (461), Jan-10 (410), Jan-09 (409), Jan-08 (367), March-07 (364), Sept-06 (264), Jan-06 (392), Sept-05 (288), Mar-05 (453), Oct-04 (460), Feb-04 (540), Nov-03 (473), Aug-03 (485)

Significantly fewer women reported being approached by touts this year

Proportion approached by touts on night of interviewing

No significant differences with Jan-14



10 Significantly lower than Jan-15

Q15 Just to check, were you approached by a driver to see if you wanted a minicab or taxi at any stage after you'd left the venue?

Base: all women/all men: Jan-16 (216/305), Jan-15 (324/327), Jan-14 (351/347), Jan-13 (304/392), Jan-12 (392/328); Jan-11 (358/340), Jan-10 (417/304), Jan-09 (375/327), Jan-08 (404/286), Mar-07 (311/292), Sep-06 (183/218), Jan-06 (256/347), Sept-05 (195/207), Mar-05 (311/292), Oct-04 (281/326), Feb-04 (308/293), Nov-03 (279/324), Aug-03 (277/328)

This year, car/van and walking are the modes with the greatest resilience between intended and actual transport mode used to reach onward destinations

Intended and actual mode of transport used

Actual Transport Used	Intended Transport Use						
	Bus	Car/van	Walk	Tube	Black cab	Train	Minicab
(Base)	(163)	(21*)	(51)	(90)	(14*)	(20*)	(141)
Bus	65%	0%	14%	14%	7%	20%	10%
Car/van	0%	84%	0%	1%	0%	0%	2%
Walk	8%	7%	73%	8%	7%	16%	5%
Tube	9%	0%	4%	61%	0%	31%	5%
Black cab	5%	0%	2%	4%	58%	11%	7%
Legal minicab	1%	0%	2%	2%	0%	0%	8%
Train	1%	0%	0%	2%	0%	22%	0%
Unbooked minicab	0%	0%	0%	0%	0%	0%	2%

QF recruitment: Intended mode of transport upon leaving venue. Q5a/b What mode of transport did you use to get to your next destination when you left the venue?

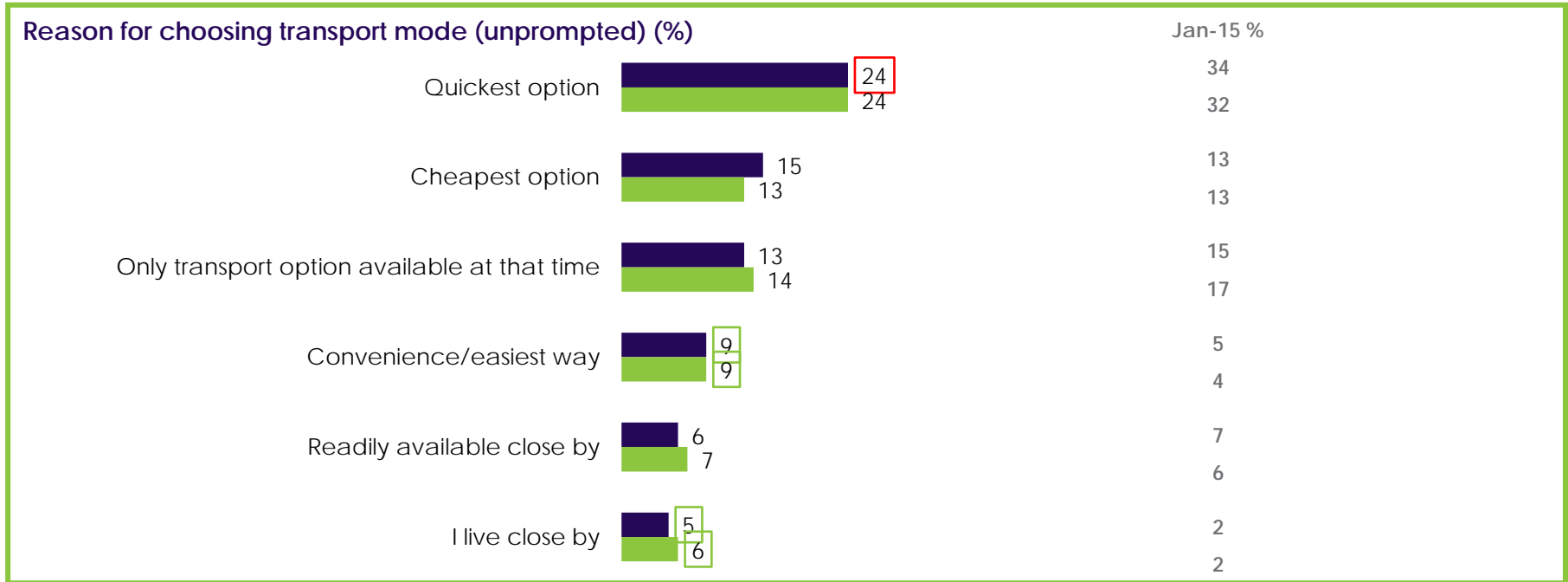
Base: All respondents using each mode *caution – low base size

When considering transport options, speed appears to be less of a concern this year, while use of a mode for its convenience has increased

Reason for choosing transport mode

 Significantly higher than Jan-15
 Significantly lower than Jan-15

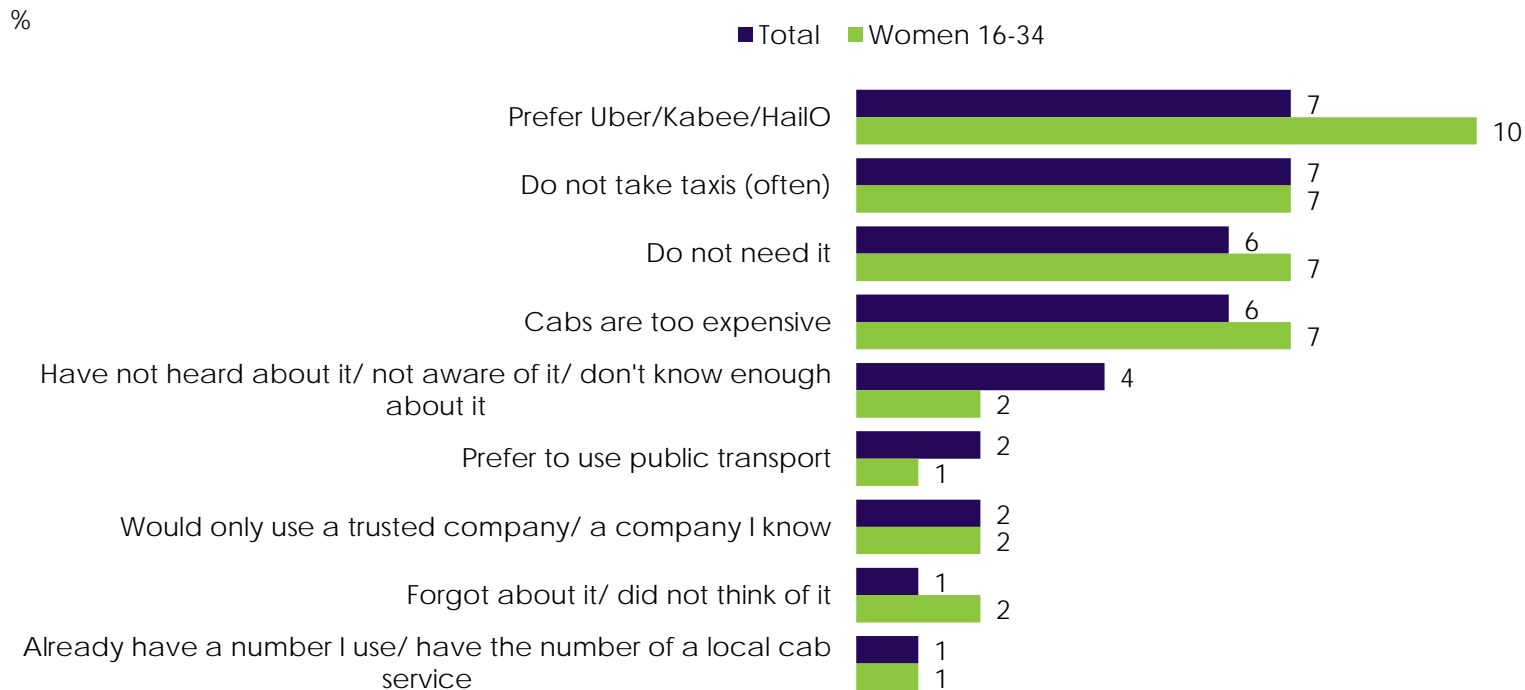
Total
 Women 16-34



Q10 What was the single most important reason for choosing to [mode used] when you left [venue]?
 Base: All respondents/women 16-34; Jan-16 (526/188), Jan-15 (651/288)

Among the reasons for not using Cabwise, this is mainly due to preferring other minicab booking services

Reasons for not using Cabwise



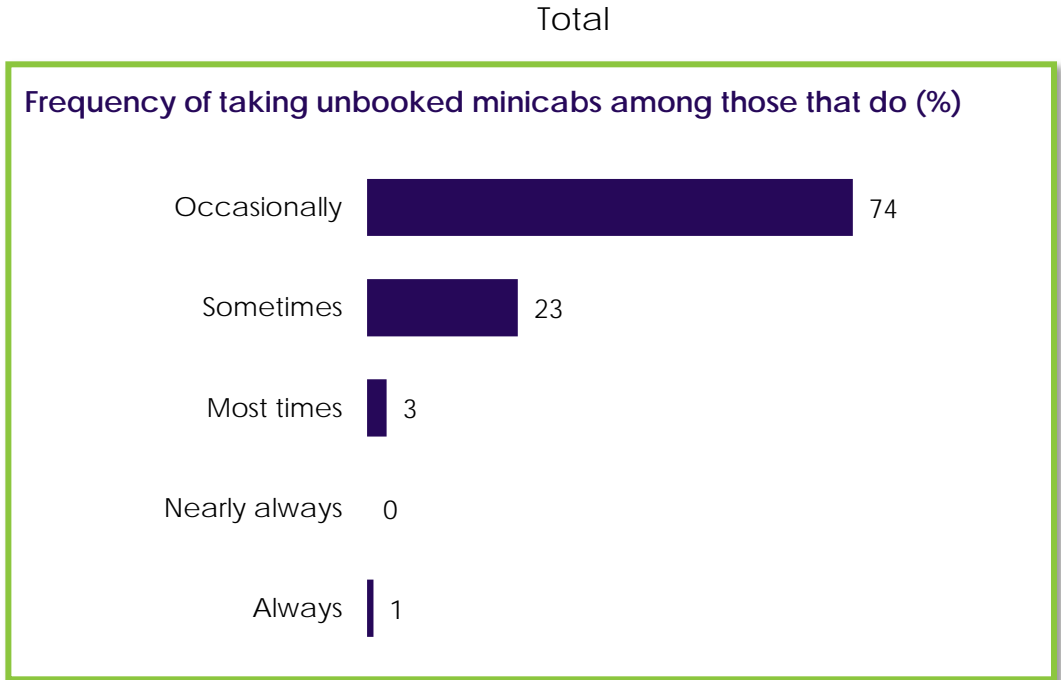
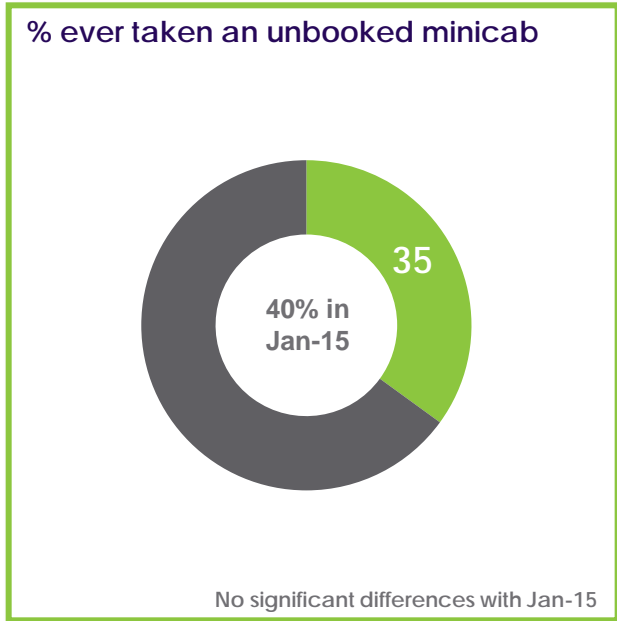
Ever had a problem with the Cabwise service

4%

Q34a Any why have you never used the Cabwise service? Base: All respondents/women 16-34 who have never used the Cabwise service (491/175) Q38 Have you ever used Cabwise services but not ended up being able to take a cab due to a problems with the Cabwise service? Base: all respondents/women 16-34 who have used Cabwise (34*/21*) *caution – low base size

The proportion that have ever taken an unbooked minicab is in line with last year

Frequency of taking an unbooked minicab



Q24a Can you tell me if you have ever taken a minicab without having booked it? Base: all respondents (526)

Q24b Can you tell me how often you take a minicab without having booked it?

Base: all respondents who have taken an unbooked minicab – excluding DK +never (144)

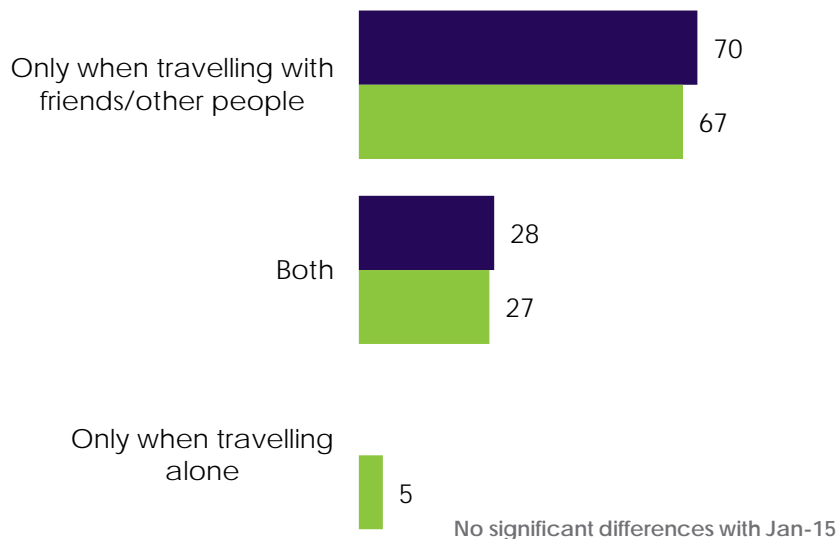
The proportions of women aged 16-34 would take an unbooked minicab in different situations are similar to those reported last year

Situations in which unbooked minicabs are taken

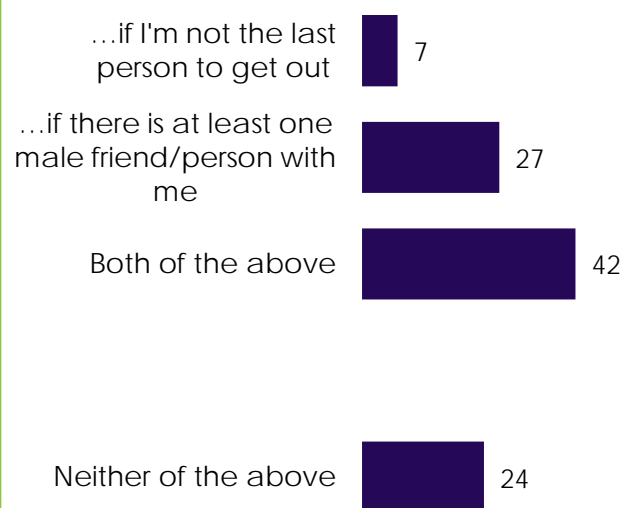
■ Women 16-34 Jan-16

■ Women 16-34 Jan-15

Situations in which would take an unbooked minicab (%)



Will only take an unbooked minicab... (%)



Q24b1 And in which of these situations do you take a minicab without having booked it?

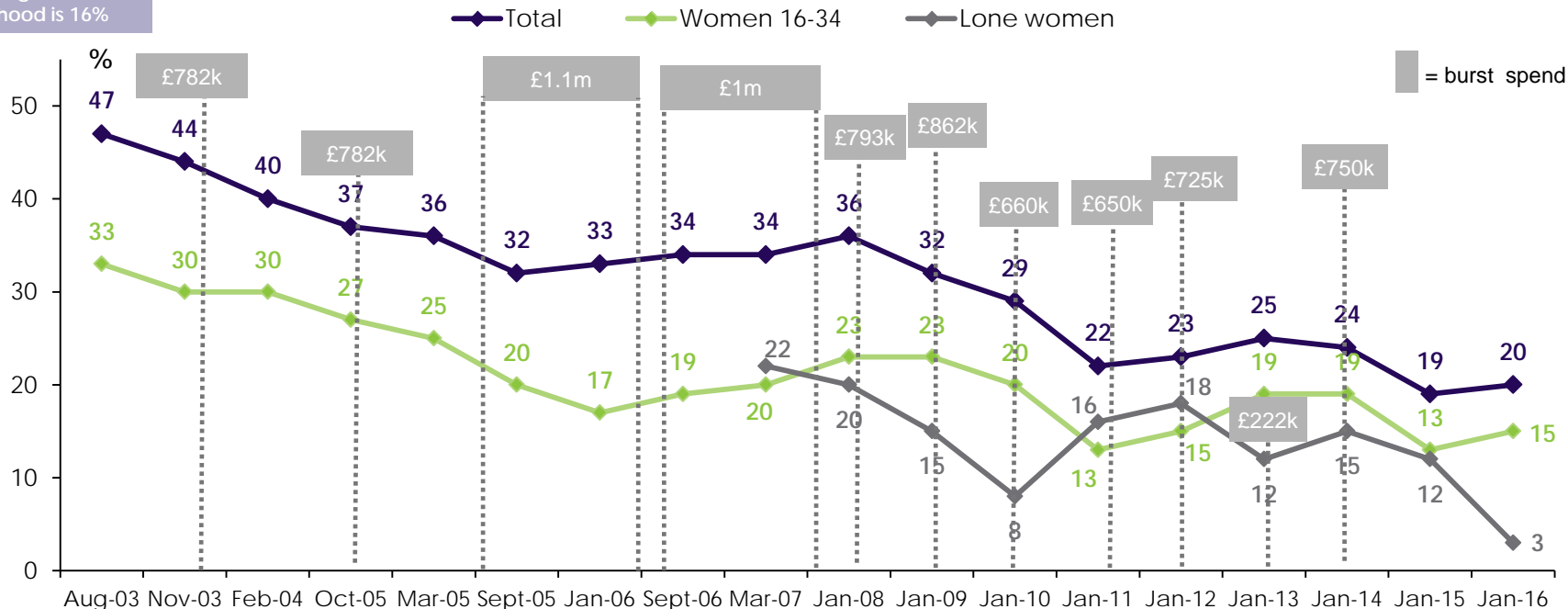
Base: all women 16-34 who have taken an unbooked minicab Jan-16 (44*), Jan-15 (91)

Q24h And do any of the following apply to you? Base: all women 16-34 who have taken an unbooked minicab with friends/other people (43*) *caution - low base size

Lone women remain the least likely to use an unbooked minicab in the future, while levels among the total and target samples have remained stable

Likelihood of using an unbooked minicab in the future

For women aged 18-27, future likelihood is 16%



No significant differences with Jan-15

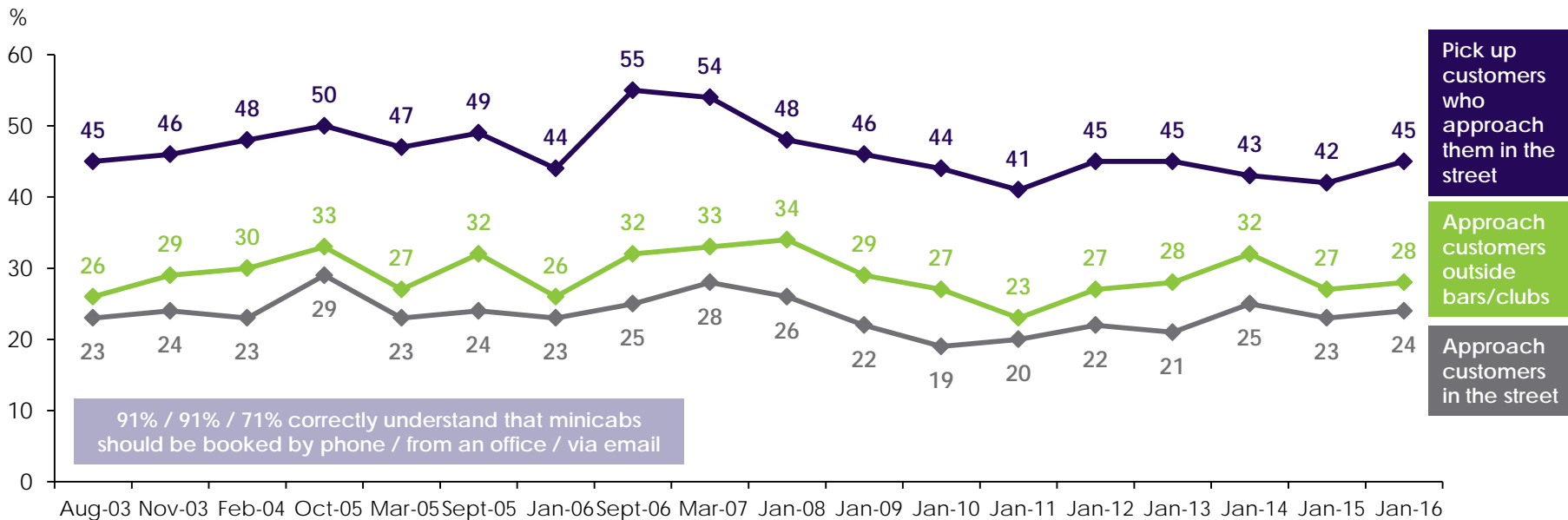
Q23. Base: all respondents/women 16-34/lone women: Jan-16 (526/188/30), Jan-15 (651/288/65), Jan-14 (700/330/39), Jan-13 (702/278/42), Jan-12 (724/334/23), Jan-11 (700/306/28), Jan-10 (721/392/85), Jan-09 (702/347/79), Jan-08 (703/386/98), March-07 (603/288/65), Sept-06 (401/172), Jan-06 (603/238), Sept-05 (402/182), Mar-05 (603/294), Oct-04 (566/267), Feb-04 (601/298), Nov-03 (603/258), Aug-03 (605/263)

* Low base size for lone women

Misconceptions among all respondents of what minicabs are allowed to do are consistent with last year

Incorrect beliefs over minicab rules and regulations (total)

Minicabs are allowed to...



No significant differences with Jan-15

Q21 I'm now going to read out a number of statements about minicabs in London and I'd like you to tell me whether you think each one is true or false...

Base: all respondents: Jan-16 (526), Jan-15 (651), Jan-14 (700), Jan-13 (702), Jan-12 (724), Jan-11 (700), Jan-10 (721), Jan-09 (702), Jan-08 (703), March-07 (603), Sept-06 (401), Jan-06 (603), Sept-05 (402), Mar-05 (603), Oct-04 (566), Feb-04 (601), Nov-03 (603), Aug-03 (605)

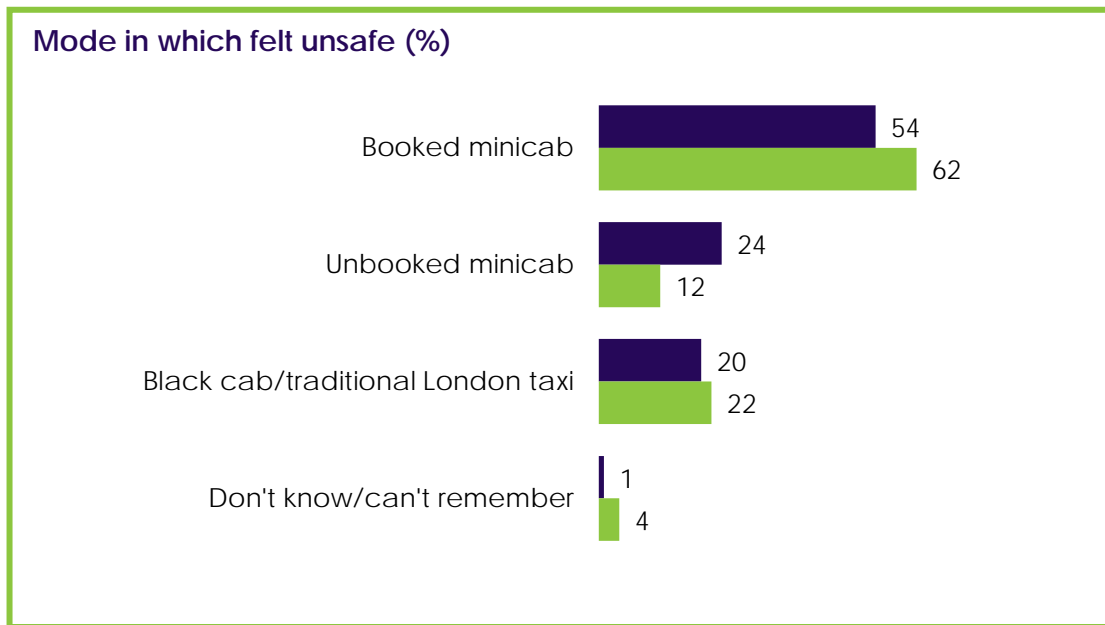
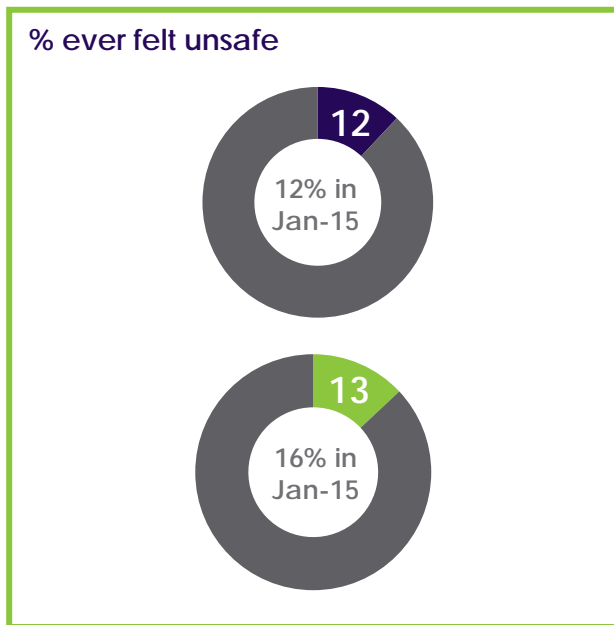
The proportion of people who have ever felt unsafe in cabs is consistent with last year. This was most likely to have occurred in a booked minicab

Feeling unsafe using black cabs or minicabs

■ Total

■ Women 16-34

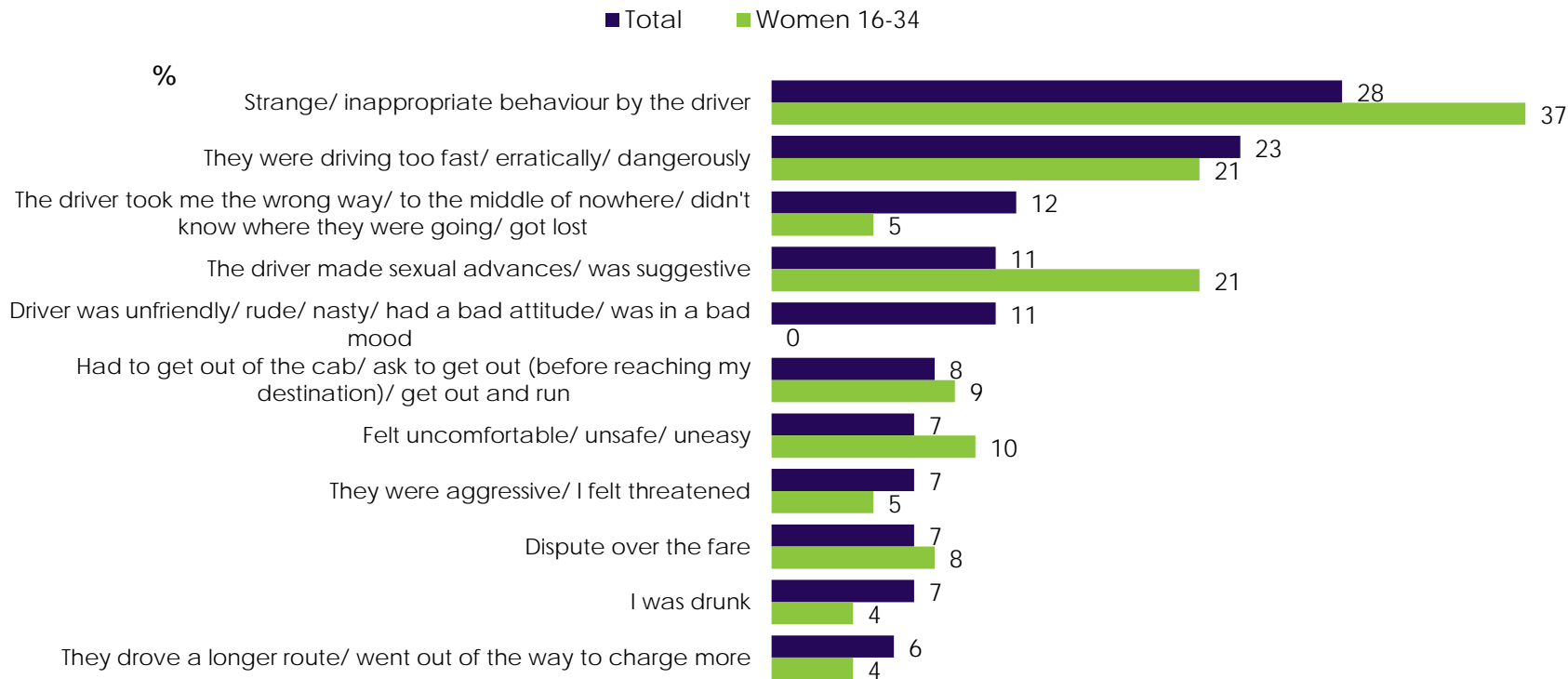
No significant differences with Jan-15



Q24e Have you ever been in a situation where you felt unsafe when using a black cab or minicab late at night? Base: all respondents/women 16-34 (Jan-16: 526/188), (Jan-15: 651/288) Q24f Can you tell me if when this happened you were travelling in a black cab, a booked minicab or in an unbooked minicab? Base: all respondents who have felt unsafe (63), all women 16-34 who have felt unsafe (24*) *caution – low base size

The behaviour of the driver is the main cause for people feeling unsafe during a minicab journey

Reasons for feeling unsafe



Q24g Can you tell me briefly about this situation when you felt unsafe. Base: all respondents who felt unsafe (63), all women 16-34 who felt unsafe (24*) *caution – low base size



Minicab rules and regulations

Indicates correct answer

ASK ALL

Q21. I'm now going to read out a number of statements about minicabs in London, and I'd like you to tell me whether you think each one is true or false. Please be aware that I'm only talking about minicabs, not black cabs.

So firstly, ... [ROTATE START]

(Do you think that this is true or false?) [SINGLE CODE]

	True	False	Don't know
(a) Minicabs are allowed to pick up customers who phone up to book them	<input type="checkbox"/> 1	2	3
(b) Minicabs are allowed to pick up customers who go to the minicab office to book them	<input type="checkbox"/> 1	2	3
(c) Minicabs are allowed to approach customers in the street to see if they want a minicab	1	<input type="checkbox"/> 2	3
(d) Minicabs are allowed to approach customers outside bars and clubs to see if they want a minicab	1	<input type="checkbox"/> 2	3
(e) Minicabs are allowed to pick up customers who approach them in the street or outside a venue	1	<input type="checkbox"/> 2	3
(f) Minicabs are allowed to pick up customers who email to book them	<input type="checkbox"/> 1	2	3

The logo for Future Thinking, featuring the word "future" in a white, lowercase, sans-serif font above the word "thinking" in a larger, white, lowercase, sans-serif font. The text is set against a magenta background with white geometric shapes, including a large arrow pointing left and a smaller arrow pointing right.

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