

# Private Hire Regulations Consultation

Talk London Survey – Oct-Nov 2015

# Methodology

*The purpose of the research was to:*

- Further to the existing TfL-run consultation which is largely focused on an industry audience, TfL and the GLA Transport commissioned additional research on Talk London to understand the views of Londoners in general, particularly private hire/taxi service users. Results should be considered in conjunction with TfL's own survey.
- The questionnaire sought to understand levels of agreement/disagreement which each proposed change to existing regulations, or proposed new regulations.
- Respondents were presented with each proposal, along with commentary to outline the implications of the change or maintaining the status quo. They were asked the degree to which they agree or disagree with the proposal.

Fieldwork ran from 19 October 2015 to 23 November 2015. An invitation to complete was emailed to the 10,000+ Talk London membership on 20 October 2015. A sample size of 869 was achieved, the respondent demographic profile is detailed in this slide deck.

Given the non-random and non-representative nature of this sample, it is not possible to highlight significant differences between the sub-groups with respect to specific proposals. This was not identified by TfL and the GLA Transport team as an insight requirement for this research. That said, where regulations are expected to impact on specific sections of the population, differences in perceptions have been highlighted. These should be regarded as indicative-only, with further research required to understand the drivers behind perceptions and behaviours.

Please note that these results have not yet been published and are for internal use only. **If you wish to circulate these results to anyone outside the GLA/TfL, or to use them publicly, please double-check usage of figures with the ORS team.**

# Research question and summary findings

## The question:

High levels of support are expected for proposals that most overtly concern passenger safety. It is anticipated that respondents will favour measures such as operators providing driver/vehicle details. Lower levels of support are expected for proposals that alter the current consumer experience (for example, a compulsory 5 minute wait or not allowing private hire operators to display cars as available for immediate hire). In general, it is expected that public perceptions will vary from views from the private hire and black cab trades. It is acknowledged that public knowledge of the distinction between private hire and black cabs and their separate regulations is not likely to be high, which may influence perceptions of the proposals.

## The findings:

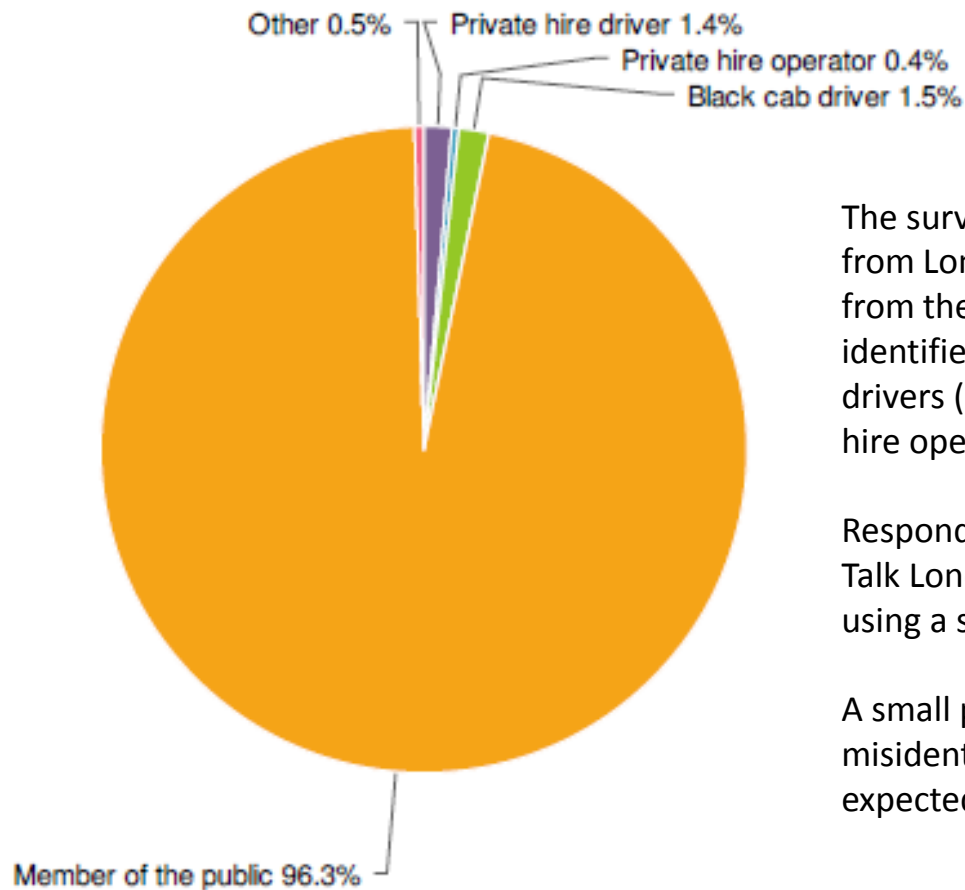
The highest levels of net agreement were seen with respect to:

- Operators providing driver/vehicle details in advance (89% - slide 5)
- Drivers meeting a minimum standard of English (86% - slide 14)
- Measures relating to insurance/driver licence compliances (90+% - slide 21-22)

The lowest levels of net agreement were seen with respect to:

- Information provided to passengers 5 mins before start of journey (48% - slide 6)
- Compulsory for operators to offer pre-booking upto 7 days in advance (40% - slide 8)
- Ending licences for operators at late night venues (41% - slide 9)
- Operators must not show vehicles being available for immediate hire (34% - slide 11)
- Private hire drivers may only be registered to a single operator at any time (40% - slide 15)

# Interest in this survey

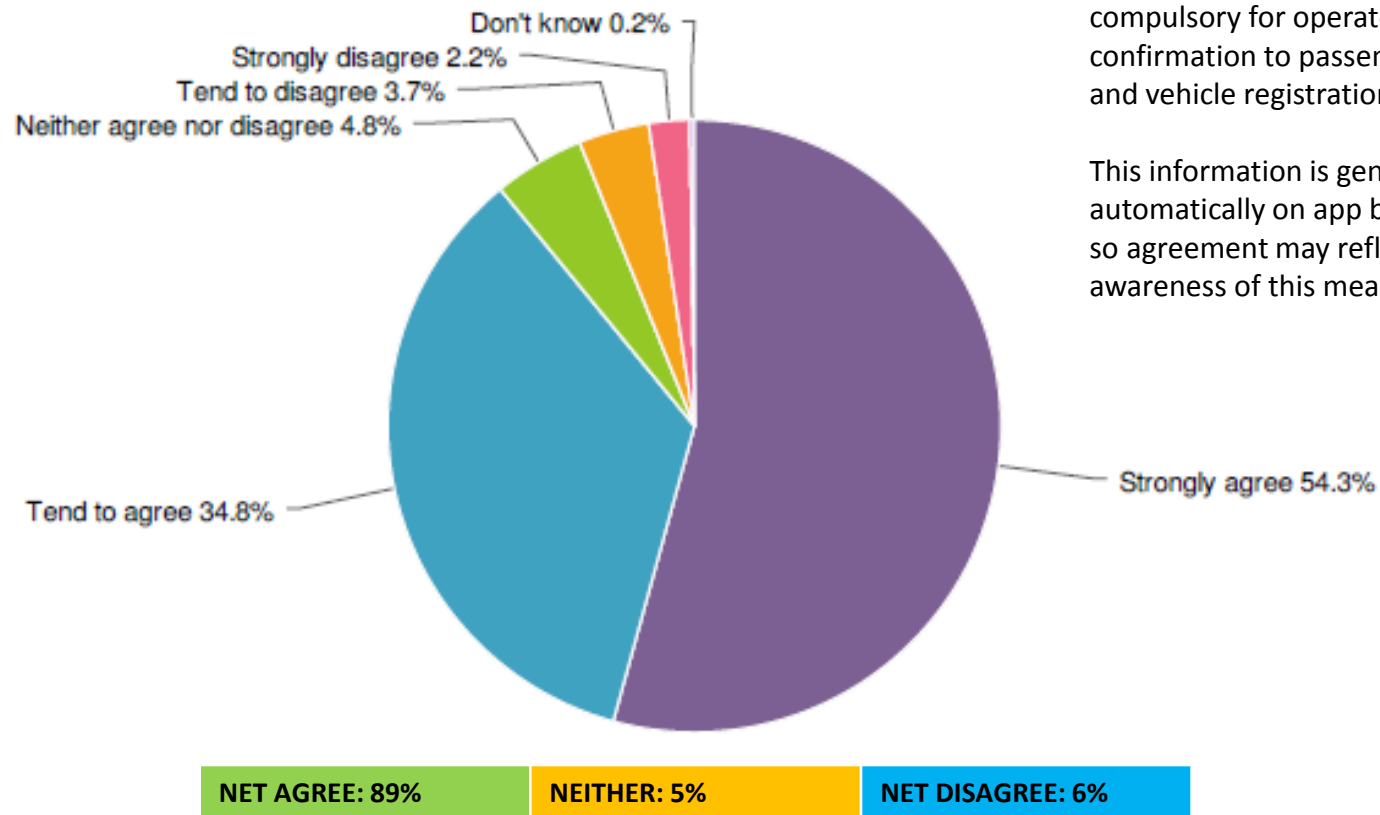


The survey appears to have met its objective to hear from Londoners in general rather than representatives from the taxi/private hire trade. 1.5% (13 respondents) identified as black cab drivers, 1.4% as private hire drivers (12 respondents) and 3 respondents are private hire operators.

Respondents who were not previously members of the Talk London research community were able to sign-up using a short registration form.

A small possibility exists that trade respondents may misidentify as members of the public but this is not expected to influence overall findings.

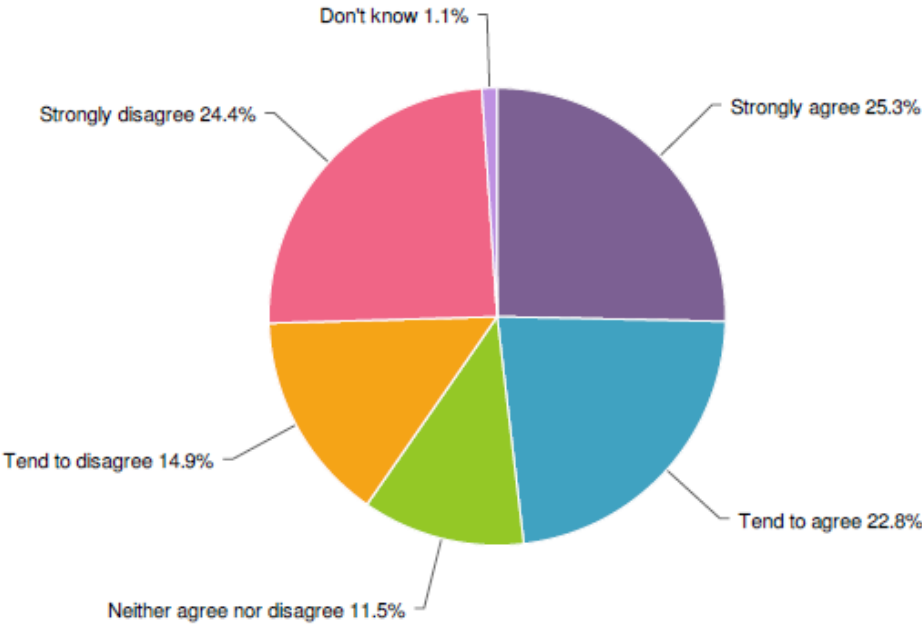
Proposal: It would be compulsory for operators to provide a booking confirmation to passengers containing the drivers name and vehicle registration number



Almost 9-in-10 respondents agree that it should be compulsory for operators to provide booking confirmation to passengers with the drivers names and vehicle registration number.

This information is generally already provided automatically on app based platforms such as Uber, so agreement may reflect consumers’ high levels of awareness of this measure.

Proposal: Operators must provide booking confirmation details to the passenger at least five minutes prior to the journey commencing

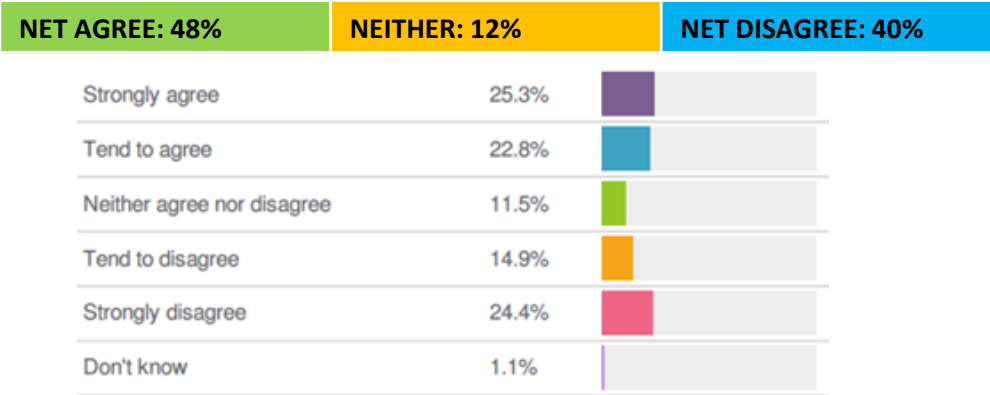


This is among the more divisive proposals. While NET agreement is greater than NET disagreement by 8 percentage points, only a minor swing would reverse this.

Roughly the same proportion of respondents choose strongly disagree as chose strongly agree (c. 25% for each). The bar chart below highlights how closely matched both sides of this proposal are.

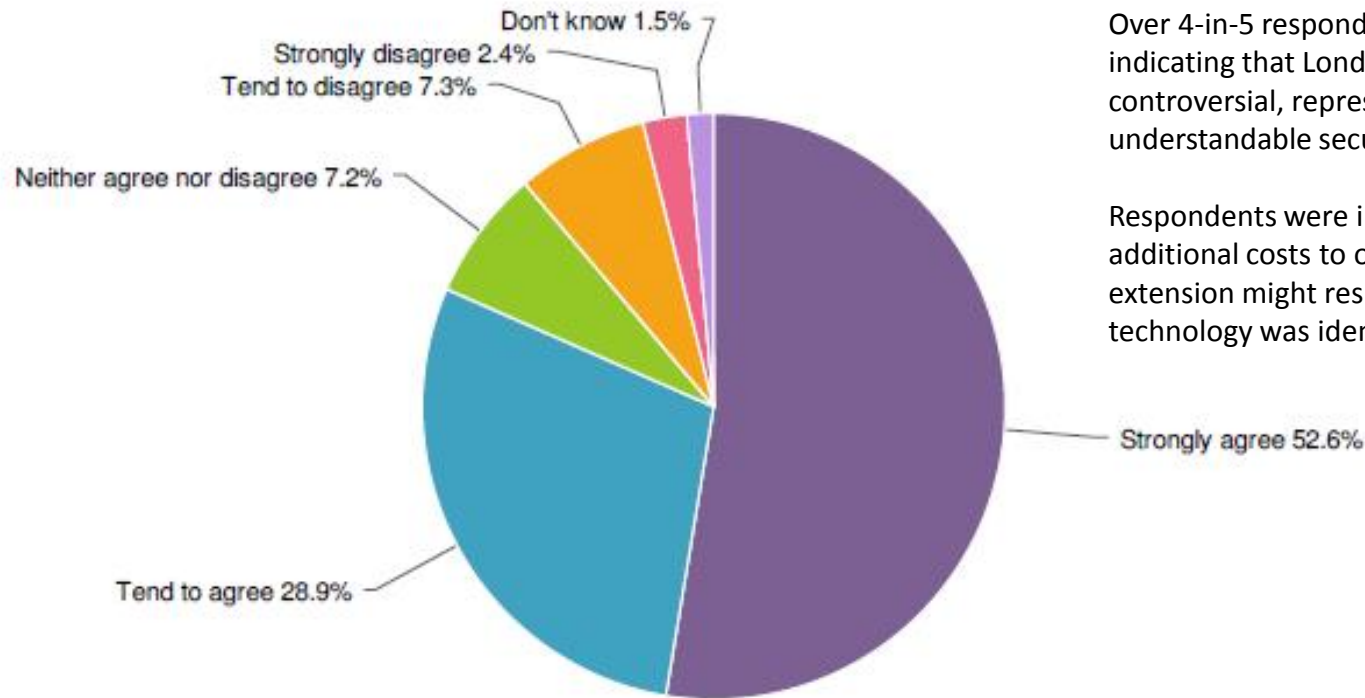
Demographic insight\*

Despite the hypothesis that this proposal would be less positively received by women, given that it may involve a longer wait on the street for a cab to arrive - women are far more likely to agree with this proposal than men.



\*nb – this survey sample is not representative of the London population. Comparisons between sub-groups should be treated as indicative only. Further research should be undertaken to understand perceptions and behaviours at the sub-group level.

**Proposal: 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**



Over 4-in-5 respondents agree with this proposal, indicating that Londoners do not see this regulation as controversial, representing as it does an easily understandable security measure.

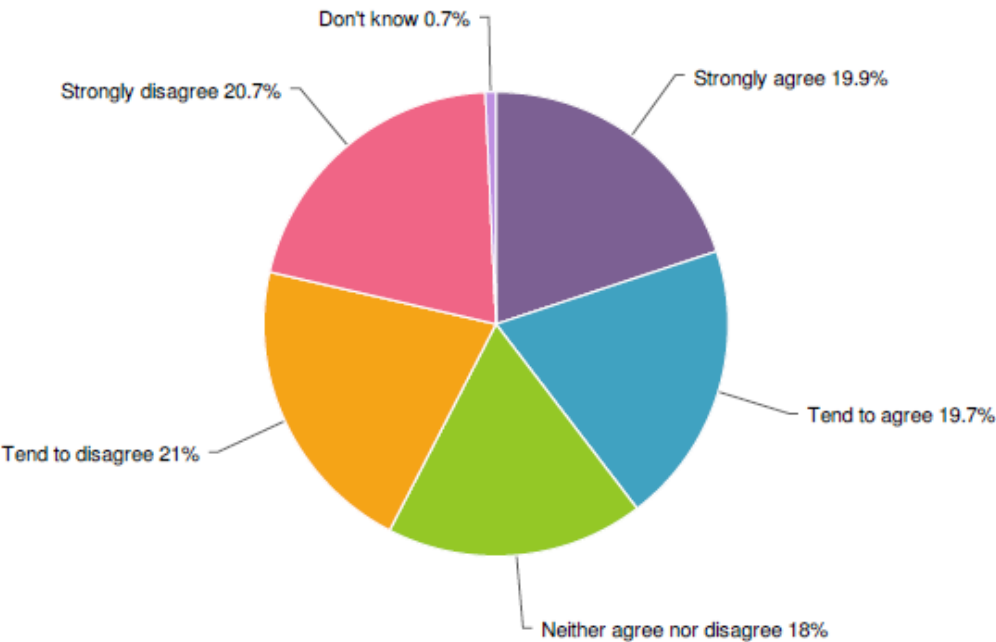
Respondents were informed that this may impose additional costs to operators/drivers, which by extension might result in higher fares. Fingerprint technology was identified as one possible measure.

**NET AGREE: 82%**

**NEITHER: 7%**

**NET DISAGREE: 10%**

# Proposal: All operators must be legally required to offer the ability to pre-book up to 7 days in advance



Similar to the regulation proposing a 5-minute delay between booking and arrival, the proposal to require operators to offer pre-booking up to 7 days in advance is also divisive.

Similar proportions of Londoners agree and disagree indicating a lack of consensus among Londoners as to the need for this regulation. This may indicate satisfaction with the status quo – ie that some operators offer pre-booking, some don't, according to the needs of their business and customer base.

### Demographic insight\*

Respondents were informed of possible benefits to disabled travellers (ie in terms of accessing the more limited supply of accessible vehicles).

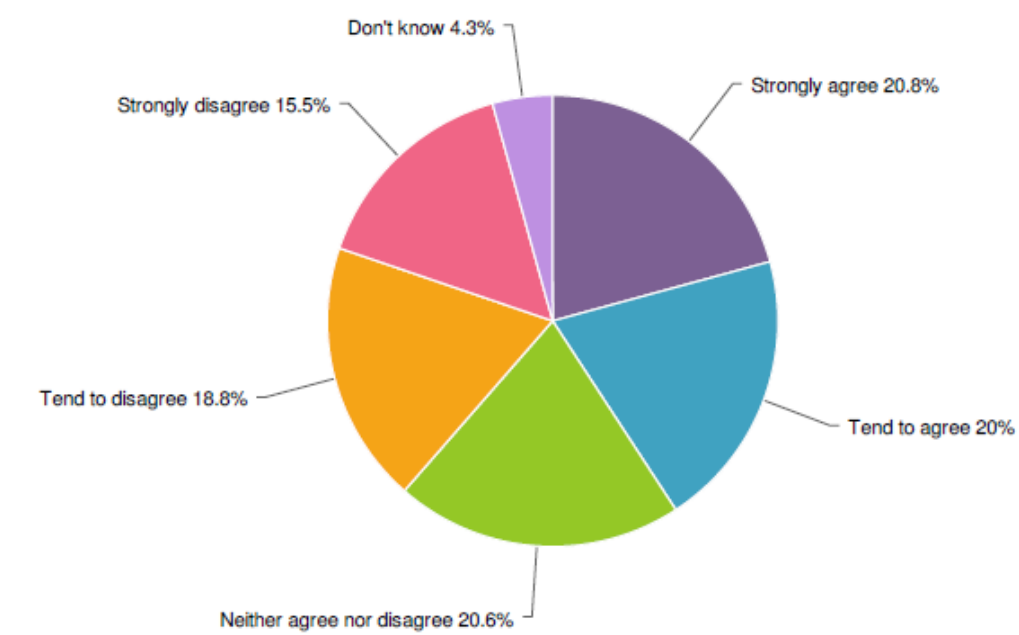
30 respondents in the survey identified as having a disability. 57% agreed with the proposal, higher than 40% among all respondents (nb – low sample size means this result should be regarded as indicative only)

NET AGREE: 40%		NEITHER: 18%		NET DISAGREE: 42%	
Strongly agree	19.9%				
Tend to agree	19.7%				
Neither agree nor disagree	18.0%				
Tend to disagree	21.0%				
Strongly disagree	20.7%				
Don't know	0.7%				

\*nb – this survey sample is not representative of the London population. Comparisons between sub-groups should be treated as indicative only. Further research should be undertaken to understand perceptions and behaviours at the sub-group level.

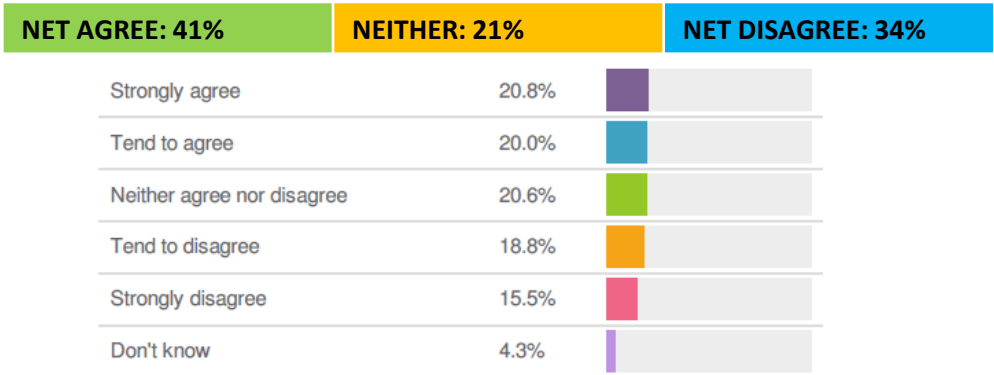


Proposal: TfL will no longer issue licences to private hire vehicle operators that accept booking inside or outside late-night venues with the vehicles themselves parked nearby



Another divisive proposal with respondents leaning towards NET agreement by only 7 percentage points. Over 1-in-5 (21%) expressed neither agreement nor disagreement. Strength of opinion is broadly similar at either end of the scale.

Given that this proposal largely concerns late night venues, it affects a specific cross-section of the population likely to take cabs home from late-night venues (ie younger, affluent). Further research may be required to understand the views of regular private hire/taxi users from such venues. Additionally, the eventual introduction of the night tube may change perceptions and behaviours with respect to this proposal.

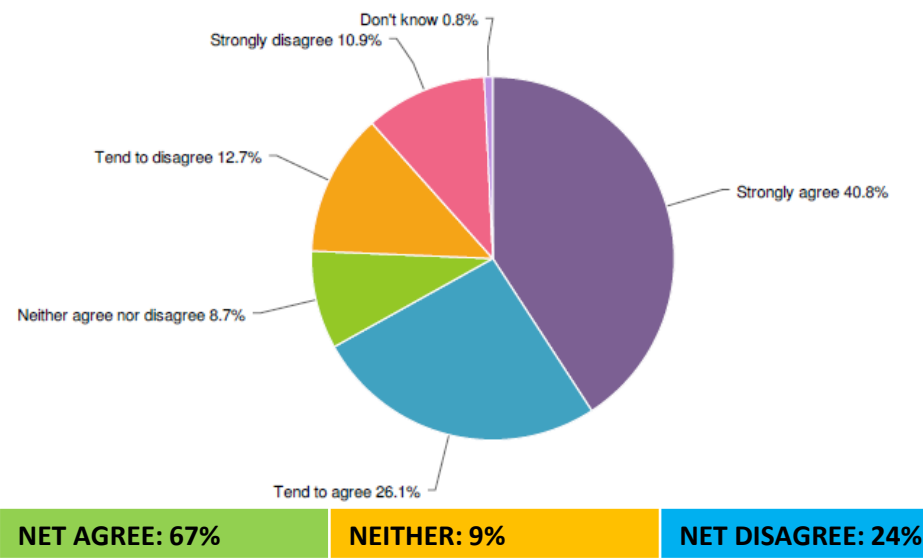


Demographic insight\*

Women are more likely to agree with this proposal than men, which may reflect concern about unlicensed cabs plying for trade outside late-night venues.

\*nb – this survey sample is not representative of the London population. Comparisons between sub-groups should be treated as indicative only. Further research should be undertaken to understand perceptions and behaviours at the sub-group level.

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



Over two-thirds of respondents agree with the proposal that operators should have a fixed landline number available for passenger use.

Booking apps such as Uber, primarily use email/online forms of communication. Other major private hire operators offer multiple methods.

Respondents were also asked to specify up to 3 preferred methods of communication should an issue emerge on their journey. Landline was the highest ranking method, followed by mobile phone number, then via an on a Smartphone, suggesting willingness among Londoners to use any of those methods.

Email, text message, in person and social media methods are less popular.

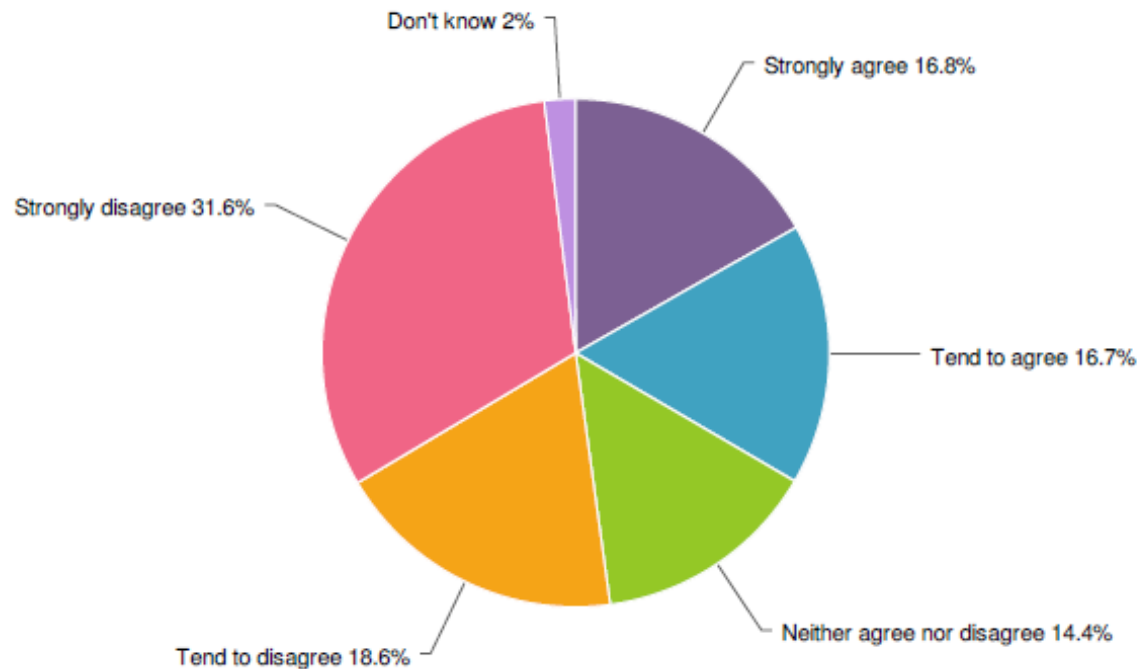
## In the event of an issue emerging with your journey which of the following methods of communication are you willing to use to contact the private hire operator?

	Score*	Overall Rank
Landline number	1450	1
Mobile phone number	1184	2
Via an app on a smartphone	653	3
Email	634	4
SMS/Text message	583	5
In person	180	6
Twitter	29	7
Other	13	8

Total Respondents 793

\*Score is a weighted calculation. Items ranked first are valued higher than the following ranks, the score is the sum of all weighted rank counts.

**Proposal: Operators must not show vehicles being available for immediate hire, either visibly (for example by signage on the street), or virtually on an app**



Half of respondents disagreed with this proposal, with only a third expressing agreement. Nearly a third (32%) chose 'strongly disagree' alone.

This appears to indicate support for operators advertising their services in similar ways to black cabs. Coupled with the lack of consensus for the introduction of a 5 minutes delay between booking and arrival, this suggests that members of the public do not favour regulations that limit the speed of service being provided.

Further research would need to be conducted to understand if this was due to safety concerns (ie avoiding waiting on the street for too long) or simply convenience.

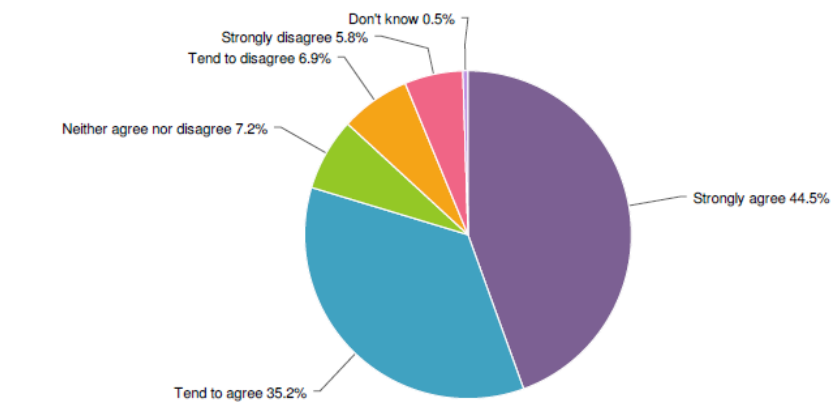
**NET AGREE: 34%**

**NEITHER: 14%**

**NET DISAGREE: 50%**

Proposal: 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

Proposal: Operators must provide a specified fare prior to the booking being accepted



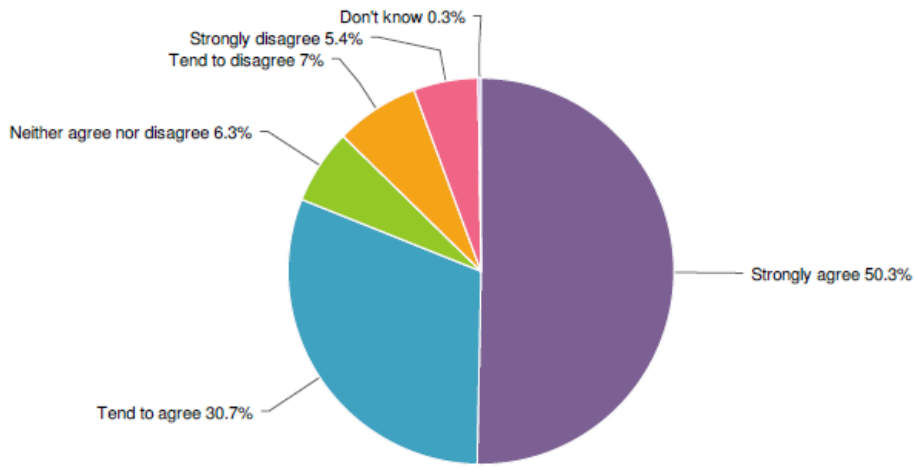
4-in-5 respondents agree with the proposal that operators must record the main destination and pick-up location for each booking, with very low disagreement at 13%.

Respondents were notified that this would require them to specify their destination at the time of booking, which is not currently required by some operators. This proposal is understood in the context of the proposal below.

NET AGREE: 80%	NEITHER: 7%	NET DISAGREE: 13%
----------------	-------------	-------------------

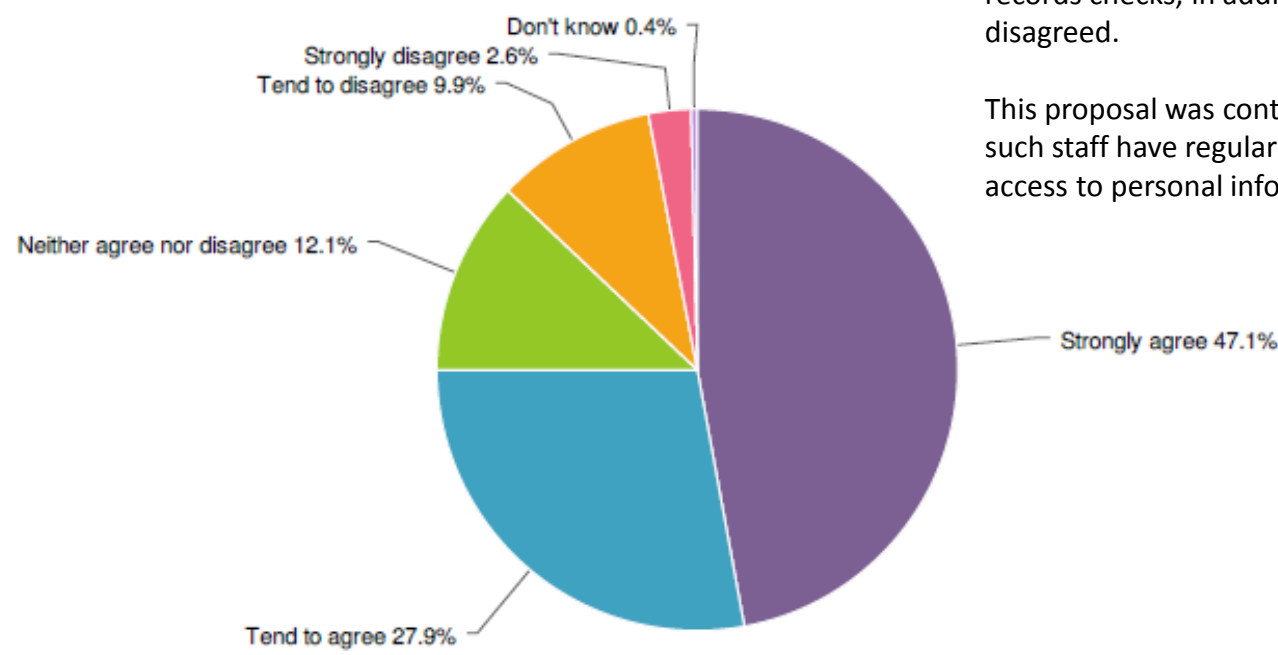
4-in-5 respondents also agree with the proposal that operators must provide a specified fare prior to the booking being accepted, perhaps highlighted the close connection with the proposal above (ie the above is required for this proposal to be implemented).

Despite high support among respondents, indicating a desire for transparent fares at the time of booking, this regulation is not required of black cabs, which generally operate a meter system.



NET AGREE: 81%	NEITHER: 6%	NET DISAGREE: 12%
----------------	-------------	-------------------

Proposal: Operator staff should be subjected to criminal records checks as part of their application process

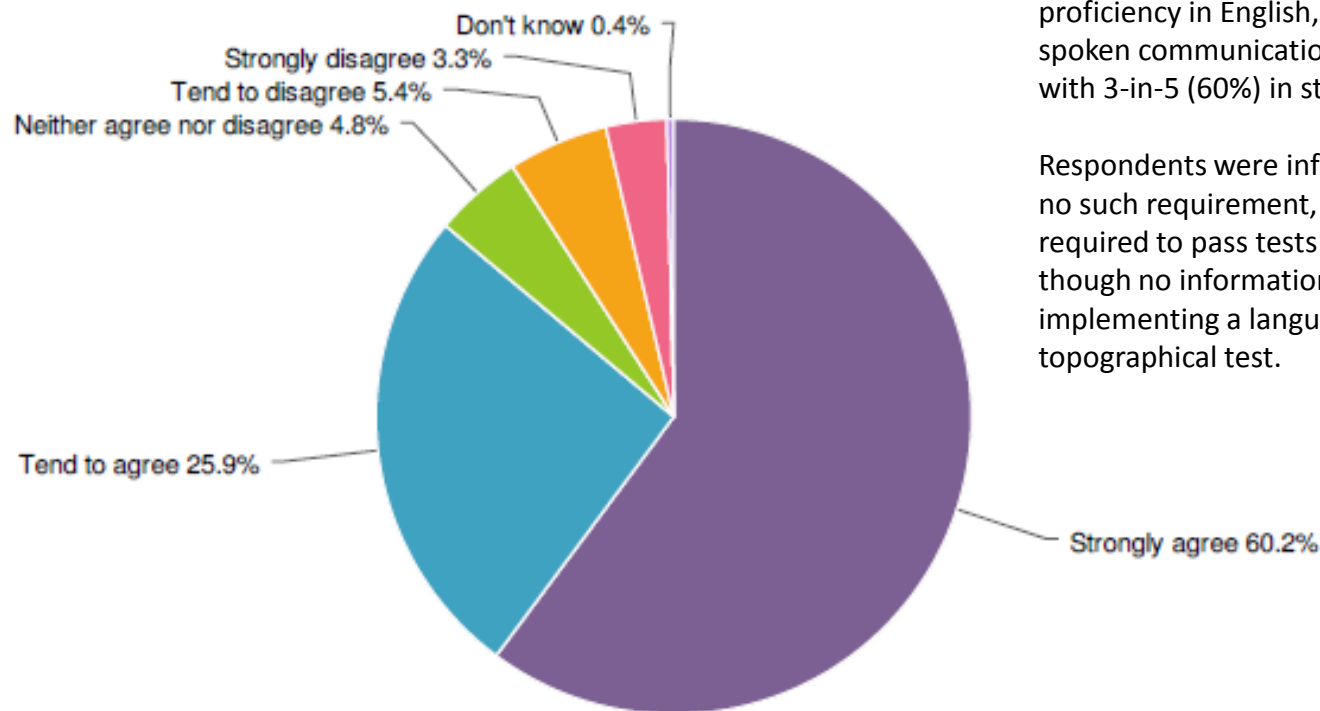


Three-quarters of respondents agree with the proposal that operator staff should be subjected to criminal records checks, in addition to drivers. Only 13% disagreed.

This proposal was contextualised with the rationale that such staff have regular interaction with the public and access to personal information.

NET AGREE: 75%	NEITHER: 12%	NET DISAGREE: 13%
----------------	--------------	-------------------

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

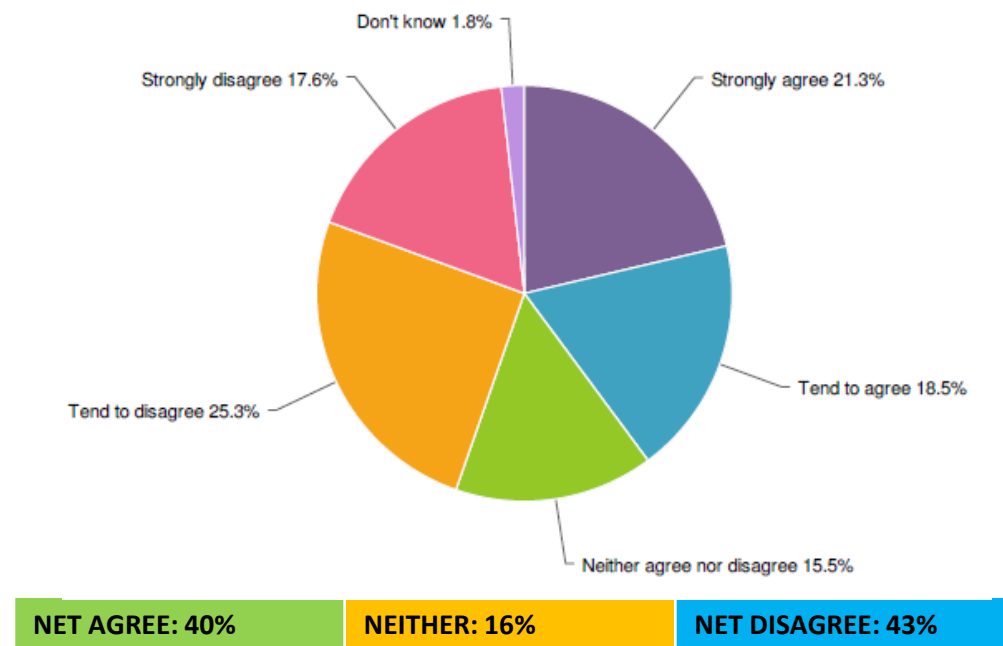


There is strong agreement with the proposal that drivers should be required to demonstrate proficiency in English, with particular emphasis in spoken communication. Nearly 9-in-10 (86%) agree, with 3-in-5 (60%) in strong agreement.

Respondents were informed that there is currently no such requirement, beyond the level of English required to pass tests to legally drive in the UK, though no information was given on the costs of implementing a language test as part of the regular topographical test.

NET AGREE: 86%	NEITHER: 5%	NET DISAGREE: 9%
----------------	-------------	------------------

# Proposal: Private hire drivers may only be registered to a single operator at any time

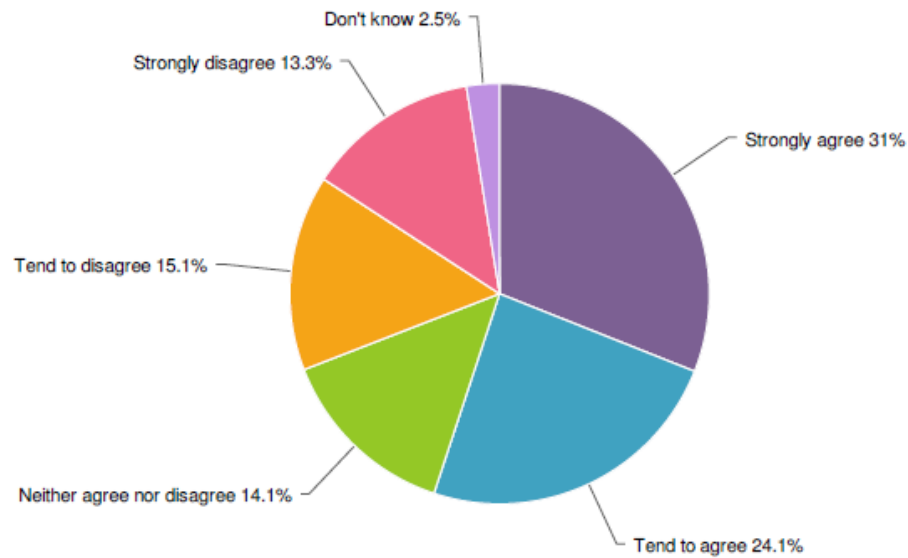


The proposal to require drivers to only work for a single operator at any single time is divisive. Similar proportions of respondents agree and disagree with this proposal. Strong agreement/disagreement is also relatively even, at around 20% for each, suggesting a lack of consensus for the introduction of such a regulation.

Respondents were informed that there would be no limit on the number of times a driver could change the operator they work for, but limiting them to one at a time would limit the risk of drivers working excessive hours (thereby increasing accident risk).

Strongly agree	21.3%	<div><div></div></div>	168
Tend to agree	18.5%	<div><div></div></div>	146
Neither agree nor disagree	15.5%	<div><div></div></div>	122
Tend to disagree	25.3%	<div><div></div></div>	199
Strongly disagree	17.6%	<div><div></div></div>	139
Don't know	1.8%	<div><div></div></div>	14

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



**NET AGREE: 55%**

**NEITHER: 14%**

**NET DISAGREE: 28%**

Over half of all respondents agree that clear controls are required with respect to ride-sharing. A significant proportion (28%, over a quarter) do not agree that private hire vehicles can't be used for ride-sharing purposes without controls.

This was not presented as a finalised proposal, so further research is required to understand perceptions of different measures and the nature of how and to what extent Londoners use ride-sharing services in general.

### Demographic insight\*

For the regulation proposing no more late-night outside-venue bookings, women were more in agreement than men, alluding to safety concerns. Here though, there is no difference in response by gender.

\*nb – this survey sample is not representative of the London population. Comparisons between sub-groups should be treated as indicative only. Further research should be undertaken to understand perceptions and behaviours at the sub-group level.



# Proposal: Operator licencing proposals

These proposals were considered of lower interest to members of the public, pertaining to technical regulations concerning the mechanics of licensing of drivers and operators. As such they were grouped together, without detailed explanation. They are presented here in order of NET agreement, highest to lowest. ‘Neither’ percentages do not include ‘don’t know’ responses.

	NET AGREE	NEITHER	NET DISAGREE
<i>A driver’s private hire vehicle licence to automatically revoked if their standard driver’s licence is revoked</i>	97%	1%	1%
<i>Operators should be required to keep all records for a period of 12 months</i>	94%	4%	2%
<i>Driver and Operator licence applicants required to provide National Insurance numbers and share with Dept for work and Pensions</i>	90%	5%	3%
<i>Operators will be required to provide specified information including details of all drivers and vehicles to TfL on a regular basis</i>	88%	5%	7%
<i>Operators will be required to seek TfL approval before changing their operating model</i>	67%	11%	18%
<i>TfL to impose a limit of 5 business names allowed to be attached to each Operator’s licence*</i> <i>*9% ‘don’t know’</i>	64%	18%	9%
<i>TfL to stop accepting payment for licence fees by PO and cheque*</i> <i>*12% ‘don’t know’</i>	35%	38%	15%

There is near unanimous agreement that private hire licence vehicles should be revoked for drivers’ whose standard licences are also revoked, for requiring operators to keep records for upto 12 months and for licence applicants to provide National Insurance numbers to DWP. This reflects the relatively uncontroversial nature of these proposals.

Nearly 9-in-10 respondents agree that operators should provide specified information on drivers and vehicles to TfL on a regular basis. This is currently only required on request by TfL.

Proposals to limit licences to a maximum of 5 business names and for TfL to stop accepting fees by PO and cheque exhibit much higher levels of ‘neither’ or ‘don’t know’ responses, suggesting a lack of public interest or understanding in the benefits of these proposals.

# Proposal: Operator licencing proposals

These proposals were considered of lower interest to members of the public, pertaining to technical regulations concerning the mechanics of licensing of drivers and operators. As such they were grouped together, without detailed explanation. Definitions of some concepts were given (eg for Hire & Reward Insurance). They are presented here in order of NET agreement, highest to lowest. ‘Neither’ percentages do not include ‘don’t know’ responses.

	NET AGREE	NEITHER	NET DISAGREE
<i>Drivers to carry or display a copy of insurance details at all times</i>	88%	8%	3%
<i>Hire &amp; Reward insurance to be check at the point of licensing and must be in place for the duration of the vehicle licence</i>	86%	6%	2%
<i>Introduce new operator licence types that incentive zero emission vehicles/disabled access with lower licence fees</i>	83%	10%	5%
<i>Operators to be required to have Hire &amp; Reward fleet insurance. This is an alternative to driver’s being responsible for their own insurance. The proposal would make it compulsory*</i> <i>*Also 7% ‘don’t know’</i>	72%	13%	7%
<i>Introduce new operator licence types that account for larger operators, who would be charged more to cover the extra costs to TfL to enforce these licences</i>	60%	22%	12%
<i>Clarify existing regulation regarding advertising, so that no advertising is allowed to be displayed inside, from or on the outside of a private hire vehicle</i>	38%	25%	32%

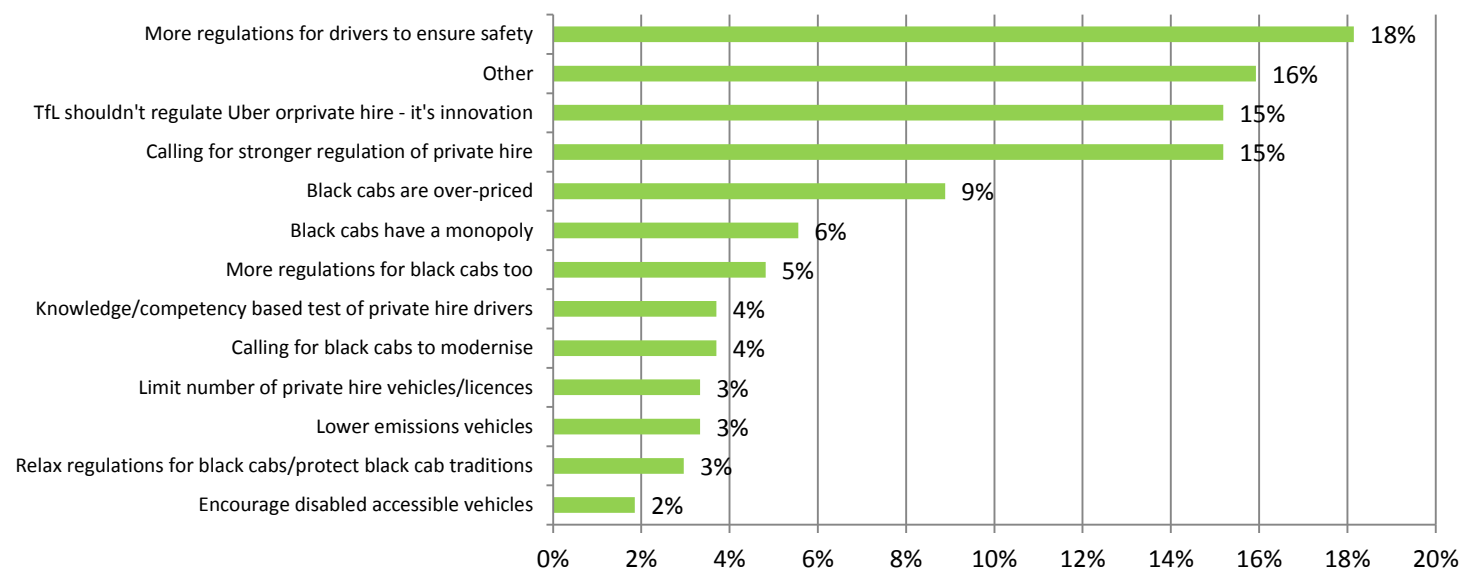
Over 8-in-10 respondents favour measures to ensure drivers carry their insurance details with them and that their policy covers the duration of the vehicles private hire licence. 7-in-10 favour a compulsory regulation to ensure that operators have Hire & Reward fleet insurance.

There are high levels of support for amending the licence fee system to incentivise zero emission vehicles and disabled access.

Reflecting the complexity of the proposed changes, there are lower levels of agreement and higher incidences of ‘neither’/‘don’t know’ for new operator licence types and amendments to current advertising regulations.

# Open comments

**If you have any other comments to make regarding private hire regulations and the proposed changes, please write them in the box below (270 comments total)**



270 respondents left comments on the regulations in general. Responses have been coded into 12 discrete categories based on the overall sentiment of each comment.

18% of these concerned regulations being required to ensure safety. 15% of respondents suggest that TfL shouldn't regulate or that the market should decide, while an equal proportion call for strong regulation of private hire vehicles, highlighting in microcosm the divisive nature of this debate.

24% of respondents mentioned a black cabs negatively – ie having a monopoly, being over-priced, requiring more regulation or needing to modernise. 3% call for more relaxed black cab regulations or measure to protect them as a tradition. Only 4% suggest private hire drivers undergoing a Knowledge-style test.



Words represented in larger font sizes were mentioned most often. Aside from common phrases in this area (eg private, hire, cab, black, taxi), commonly mentioned terms include 'Uber', 'drivers' and 'safety'/'safe', demonstrating that Londoners do view the proposed regulations in terms of their effect on Uber and safety concerns.

**Sample comments (full transcript of comments also available)**

*"TfL must recognise that it's role is to keep London clean and safe. Any regulations outside these two objectives including regulating how vehicles may be hired, is impacting to competition and the free market"*

*“Safety of passengers and drivers should be of paramount concern, closely followed environmental (emissions, congestion) concerns”*

*"Licences should not be given to too many drivers, i.e capped so that there is less pollution. Why not propose a 'light' version of the black cab knowledge so that passengers can be reasonably confident that the driver will know where he is going without 'satnav'."*

*"I think there is room in London for both black taxis and private hire. I regularly use Black Cabs (if in a hurry as they know the shortcuts so willing to pay more), uber (when I have more time and because cheap), and minicabs (for longer trips that I can get a quote / fixed price for)"*

*"Services such as uber have been a godsend for people like myself. Being able to book a taxi to arrive within 5 minutes, and being provided with their photograph, licence plate and car type as well as being able to track their location has been useful and enables passengers such as myself to feel safe"*

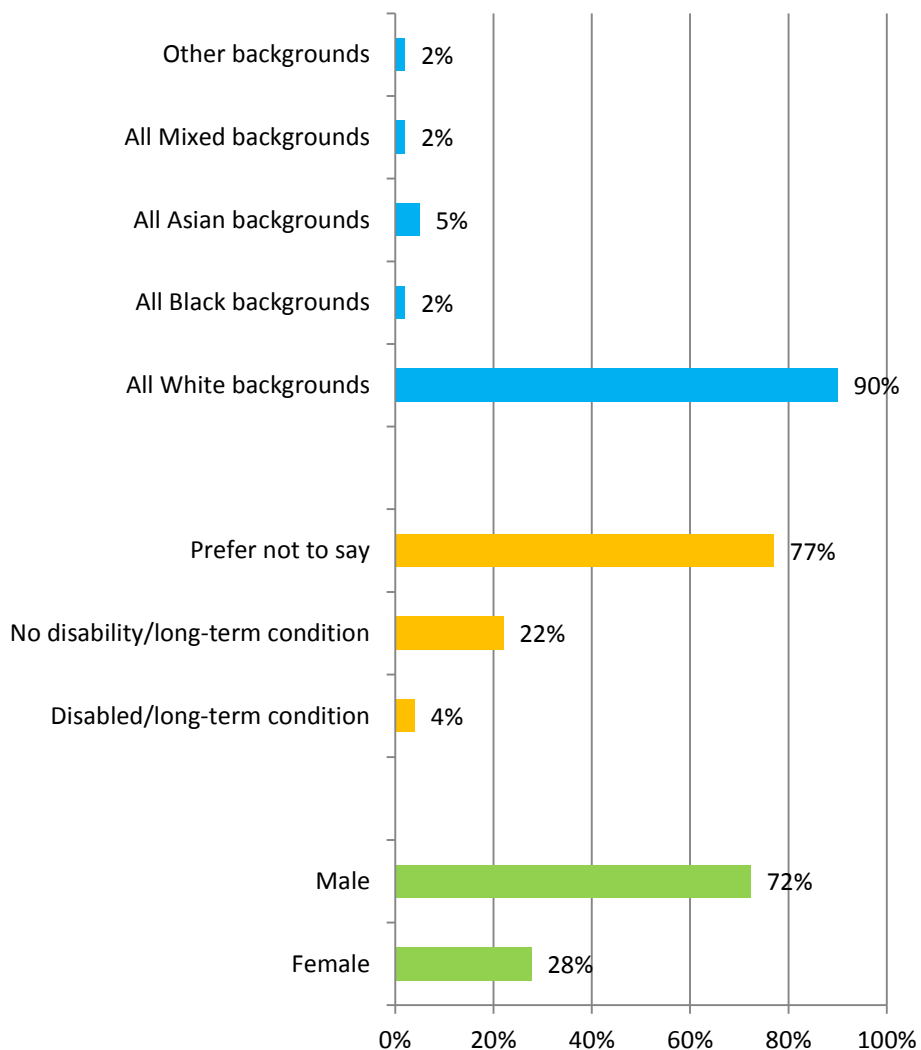
*"making passengers wait for 5 mins for bookings is bonkers, especially in outer London where there isn't passing black cab trade. Removing vehicle licences (ie the yellow disks) will make it harder to know if you are in a legit mini-cab. In these proposals...make sure you are considering outer Londoners rather than just the going-ons in zone 1&2."*

*"A driving skills check, on drivers, might make it safer for all."*

*"Most of the public don't understand the difference between Hackney and Private Hire licences."*

*"Same rules and regulations should apply to all including black cabs. All should operate under the same legislation."*

# Demographic profile of respondents



A representative sample of Londoners was not identified as a research requirement during commissioning. This survey was conducted on a non-random basis, with all Talk London members invited to respond. Weighting of data to mirror the London population was not conducted.

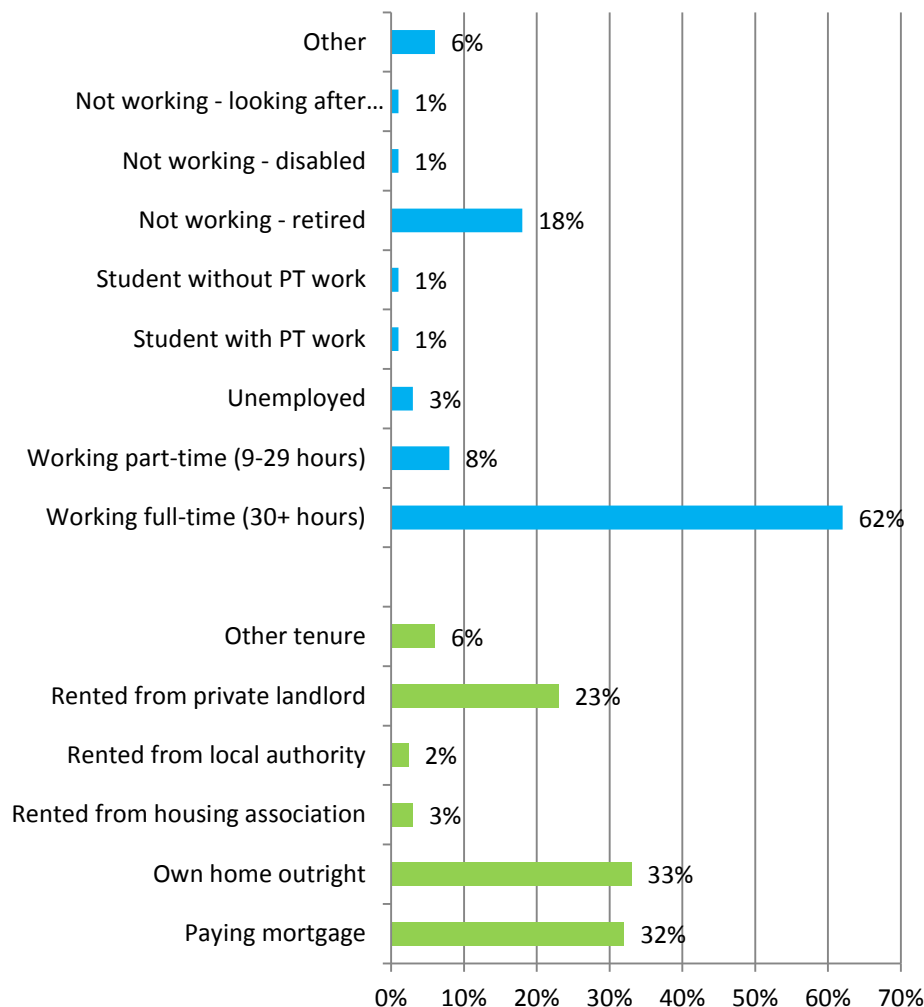
Nonetheless, it is useful to highlight the demographic make-up of respondents, to understand any limitations, under or over-represented groups and target future research to further understand motivations, perceptions and behaviours. 90% of respondents identified as being from a white background, with the remaining 10% being BAME.

4% (30 respondents) identified as having a disability. Further research may be required to understand how particular regulations impact on this group.

There is a gender imbalance among respondents, with nearly three-quarters being male.

White British Londoners are overrepresented in terms of the proportion of the population they make-up, while a number of BAME groups are underrepresented. It is recommended that for any future research work consideration is given to whether a general London audience is desired or a sample that reflects the make-up of private hire users only.

# Demographic profile of respondents



Nearly two-thirds of respondents are working full-time, with the next largest group being retired Londoners (18%).

In terms of housing tenure, most tenure types are represented in significant numbers. 28% are renters (either private, local authority or housing association), while 65% are homeowners (either outright or through a mortgage). According to ONS data, 50% of Londoners are homeowners (outright or mortgage), while 25% rent from a private landlord. As such, these groups are well-represented in this sample.

23% of Londoners rent from a housing association or local authority, so this group is somewhat underrepresented in this sample.