

Ridesharing in London

Focus Group Debrief

Transport for London

April 2017

Report Overview

- Background
- Research Objectives
- Methodology and Sample
- Introduction
- Findings
 - Awareness of ridesharing services
 - UberPOOL: understanding/reaction to concept and passenger experiences
 - When and why and when and why not?
 - Potential benefits, issues and concerns
 - Views on the process and the driver
 - Views on regulation, CCTV and the future
- Conclusions

Background

- Ridesharing is a relatively new concept to London
- There are currently two ridesharing options available to passengers:
 - UberPOOL[^]
 - Location specific sharing in black cabs e.g. train stations
- For the purposes of this report, ridesharing specifically refers to minicab ridesharing services such as UberPOOL

[^] Since this research was undertaken, GETT launched a black cab sharing service in a small number of locations

Research Objectives

- To explore black cab & minicab user's understanding, experience of, and current attitudes towards ridesharing in London
- Specifically with those who have not experienced ridesharing:
 - Why had they not tried it?
 - What their concerns are, if any, in relation to trying this type of service?
- Specifically with those who have experienced ridesharing:
 - Why they chose that option?
 - What was their experience of it in relation to cost, fellow passengers, the driver and the general process from booking to leaving the vehicle

Research Objectives

- With all the respondents:
 - Why and when people may chose to use a ridesharing service
 - The potential benefits it offers and the concerns they have about it
 - How it should be regulated
 - How it might develop & and impact on other forms of public transport

Methodology

- Two qualitative research groups which ran for around 90 minutes each
- First focus group took place at the Research House in Wimbledon
- Second focus group took place at Steer Davies Gleave, near Waterloo
- Eight respondents took part in each group

Focus Group Sample

- Mixed gender with a spread of ages and socio economic classes
- All users of black cab & minicab and black cab & minicab apps
- All currently use a minicab app offering ridesharing - Uber
- Were aware of its ridesharing option - UberPOOL
- Some users of other black cab & minicab apps:
 - Addison Lee
 - Kabbee
 - Hailo
 - Karhoo[^]

[^] Since this research was undertaken, Karhoo has recently relaunched with funding from RCI Bank and Services

Focus Group Sample

- Mix of ridesharing usage:
 - Those who had tried ridesharing (4 in the first group, 2 in the second group)
 - Those who had concerns about using ridesharing (at least two in each group)
 - Those who were aware of ridesharing but hadn't used it

Introduction

Presentation date

The 'Traditional' Approach

- Black cabs seen to be very professional
 - Well trained drivers, have passed 'The Knowledge', and know how to get to places quickly and efficiently
 - Traditionally shaped, black cab with orange light - clean
 - Subject to strict regulation by TfL
 - Mainly UK drivers
 - More associated with hailing on street but can call, use app
- (Very) expensive
 - Only use when work paying
 - Very rarely if ever for personal use

- Black cabs are seen to be the most professional and well regulated

The 'Traditional' Approach

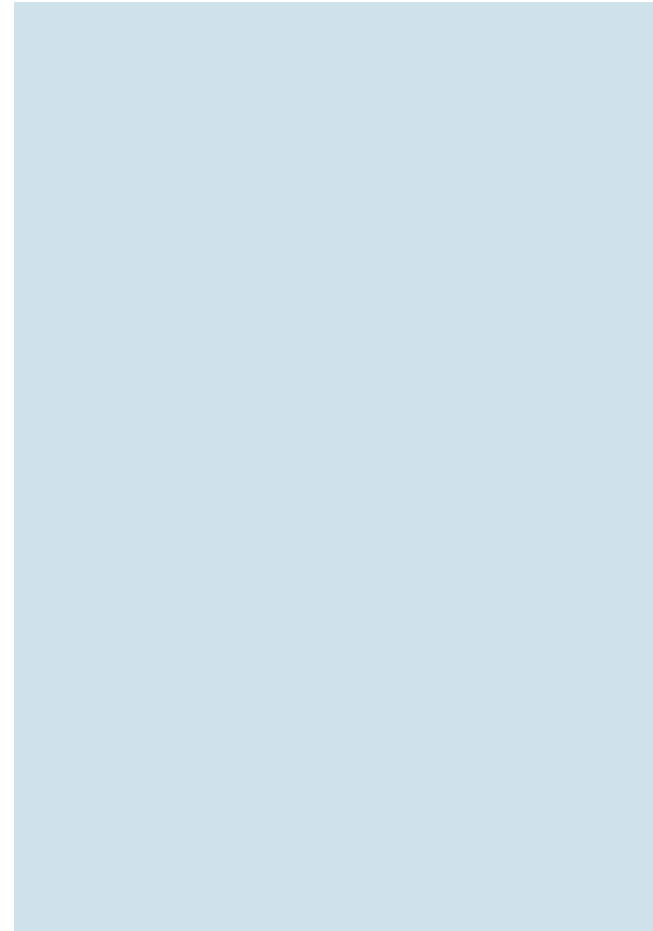
- Minicab seen to be much more varied in quality
 - Part of a local firm with an office base
 - Less professional, well trained drivers, if trained at all
 - Drivers are more likely to be born overseas
 - Car types vary as do levels of cleanliness
 - Used to and still can call but more likely use an app now to book
 - (Much) cheaper than black cabs
- Minicabs are much more varied in quality but much cheaper than black cabs
 - Some especially older people still like to book minicabs on the phone

The 'New Wave' – Apps & Uber

- Uber seen to be a new form of black cab
 - Referred to as an 'Uber' – not a black cab or a minicab
 - Book via app – no need to talk
 - Uses phone's GPS locate passengers
 - Remote payment by registered payment card
 - Different Uber options available
 - Standard, expensive, ridesharing
 - Self employed drivers who use their private car as a minicab
 - Almost all immigrant drivers, some with poor English skills
 - Often little knowledge of London – rely on Sat Navs
 - Cars is often a Prius – no congestion charge, eco friendly

The 'New Wave' – Apps & Uber

- Uber's awareness and usage driven by promo codes
- Often seen as the cheapest and quickest option in London (except when Uber uses surge pricing)



The 'New Wave' – Apps & Uber

- Traditional black cab and minicab services and new operators have also moved towards using app technology to offer black cab services:
 - Uber (minimal recognition of direct alternatives)
 - Similar to Uber but for black cabs – e.g. Hailo
 - Comparison sites – e.g. Kabbee, Karhoo[^]
- Many of these services are trying to copy Uber's marketing strategy of offering discount Promo codes to drive awareness and usage
- But Uber is still very dominant in peoples minds (at least in these focus groups)

[^] Since this research was undertaken, Karhoo has recently relaunched with funding from RCI Bank and Services

Views on Ridesharing

Presentation date

Awareness of Ridesharing

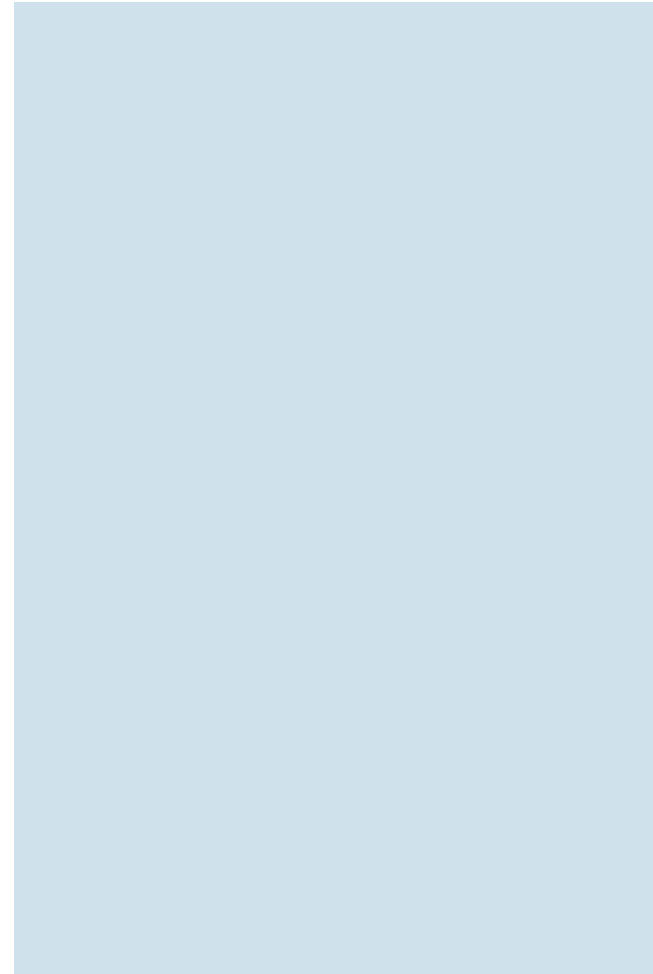
- Only one company known to offer ridesharing – Uber (via it's UberPOOL option), although one respondent thought another company, Lyft, may offer it too
- Seen to be a relatively new service
- Awareness of UberPOOL raised in a variety of ways via:
 - Uber app – there as an option when you use the app
 - E mail – sometimes offering a promo code
 - Media – reports in newspapers, BuzzFeed
 - Promos – which sometimes users were unaware of even though they were applied to their fare - £15 off
 - Recommendation – from those who have tried especially in relation to the money they saved
- Awareness of UberPOOL seemingly much less driven by using promo codes than with Uber itself

Understanding of UberP OOL

- It is generally understood that you get a reduction in your fare if you share with another stranger
- Beyond that understanding varies greatly and most make a series of assumptions about the service as opposed to researching the details
- No one really seemed to know how much they would save off a normal fare - varied from 25-75% - with many thinking 50% was fair (when it is in fact 25%)

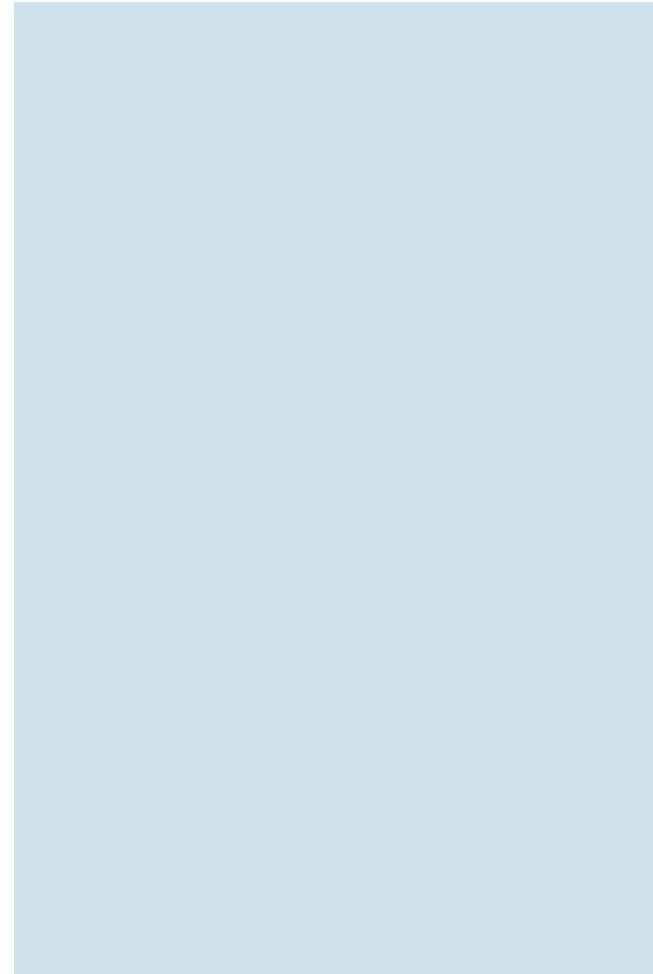
Understanding of UberPOOL

- It was largely assumed that:
 - Extra pick ups/drop offs would only add 10 – 15 minutes to the journey
 - The vehicle would not go far off the normal route to your destination
 - That the vehicle would not be too full – 2 or 3 passengers, not 4 in a vehicle
 - There would be room enough for an individuals sharing baggage



Initial reaction to the UberPOOL concept

- There was a spectrum of reaction to the ridesharing idea from:
 - Those who tried it with very little forethought
 - Those who tried it but had some concerns the first time
 - Those who would use it but had no need of it as yet
 - Those who had concerns which would largely put them off
- For those who tried it the cost saving was the main motivation
 - Savings can be significant – with one example of a normal £20 fare being reduced due to the Pool option to around £5 (including the use of a promo code)

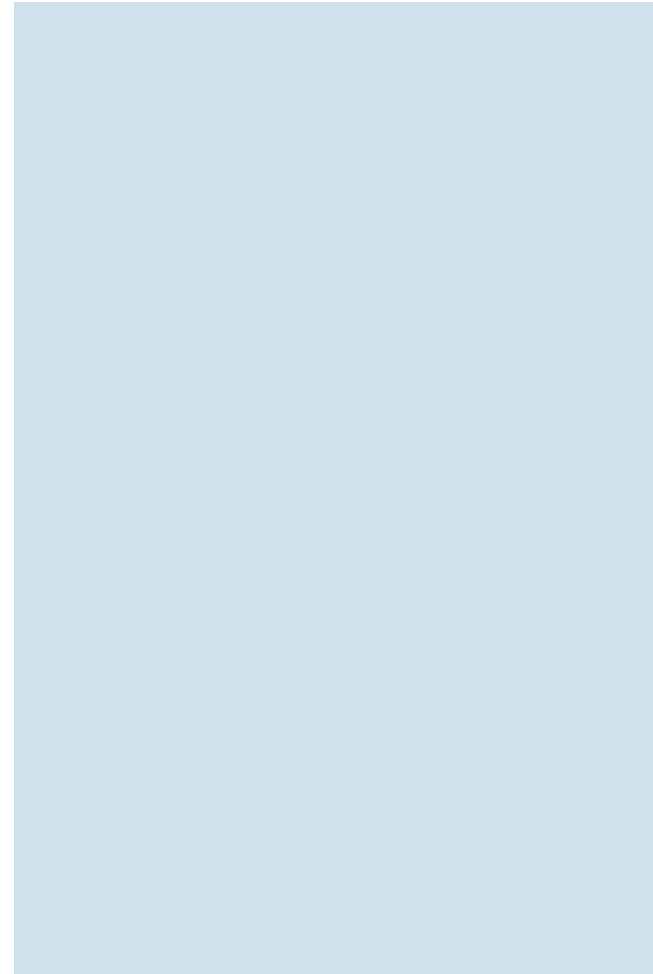


Initial reaction to the UberPOOL concept

- However availability of black cabs or minicab vehicles was also a consideration
 - The only / quickest option available
 - They wanted to get home
- And the mood they were in also played a part
 - Many of those who had tried it tried it after a night out and were in a more 'carefree' mood after drinking and having had a good night out
- Travelling with others also had an influence
 - Some noted they would try it with their friend / partner due to 'safety in numbers'

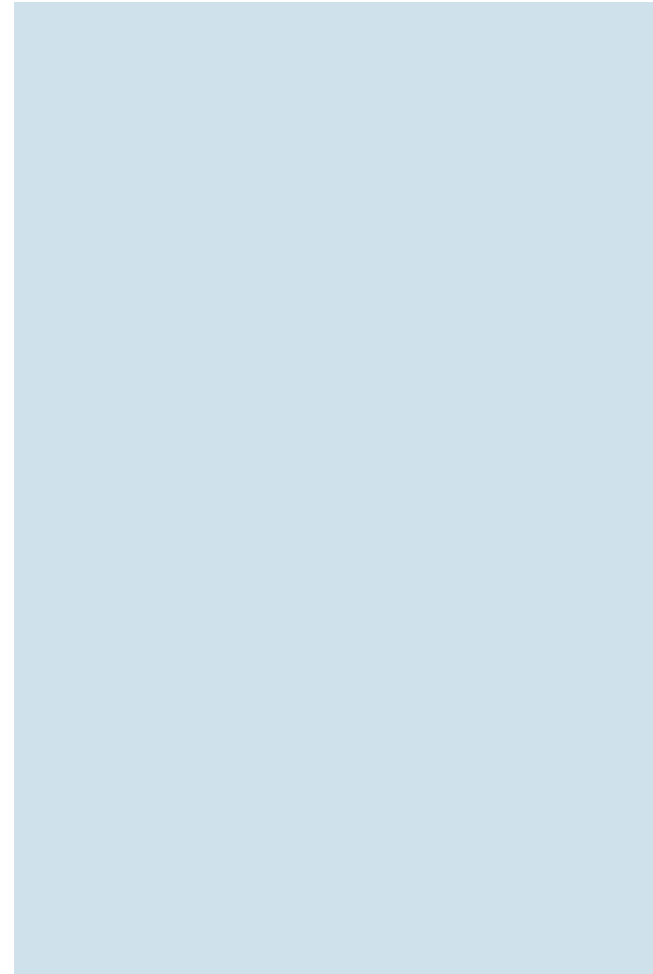
Initial reaction to the UberPOOL concept

- Whilst some did not give using UberPOOL a second thought, mainly men, others were a little anxious the first time, particularly in relation to what the other passengers might be like:
 - Would they be 'weird', 'unpleasant'?
 - Would it just be a bit awkward – have to speak?
- Some did not have these concerns and were happy to use it but had had no need of it as yet
 - They always travelled with friends who filled the black cab or minicab vehicle



Initial reaction to the UberPOOL concept

- But others did have concerns which put them off the idea of this sort of ridesharing service, especially if they were on their own:
 - Safety concerns with other passengers (mainly for women)
 - More intimate environment than on a bus
 - Other passengers could end up knowing where you live if you were dropped off first
 - Seems to go against childhood learning – do not get into a car with strangers!

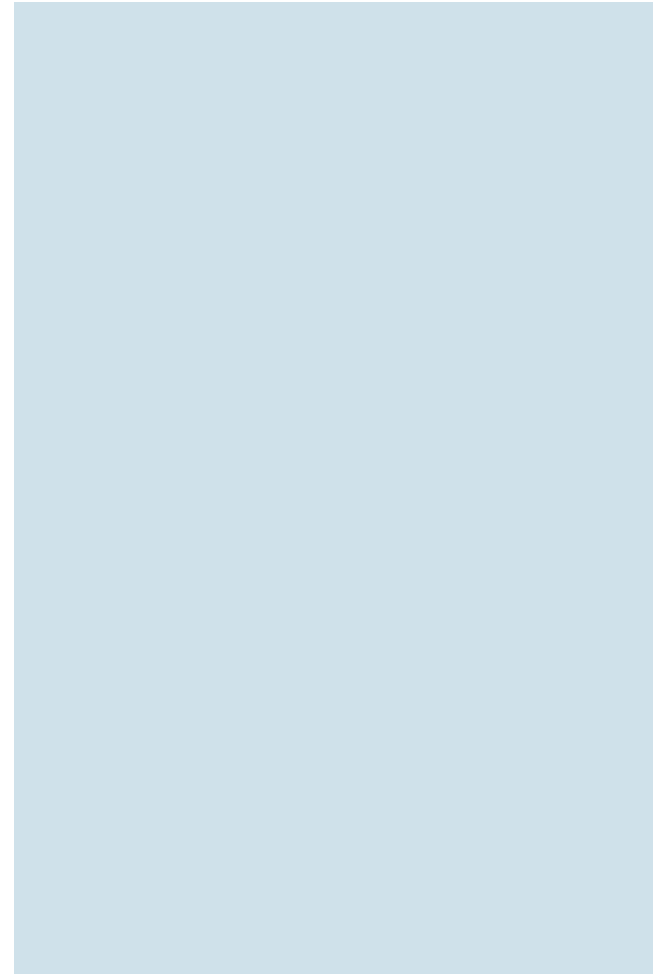


Initial reaction to the UberPOOL concept

- Potential for unpleasantness:
 - Drunken or weird or vulgar or unlikeable fellow passengers
 - Don't want to have to talk to other people
 - A black cab/minicab vehicle is a personal haven
 - Security concerns (women and men)
 - Might be easier to steal property from you
 - Could be two of them and only one of you
 - Would not want children / wives travelling with strangers – especially other men

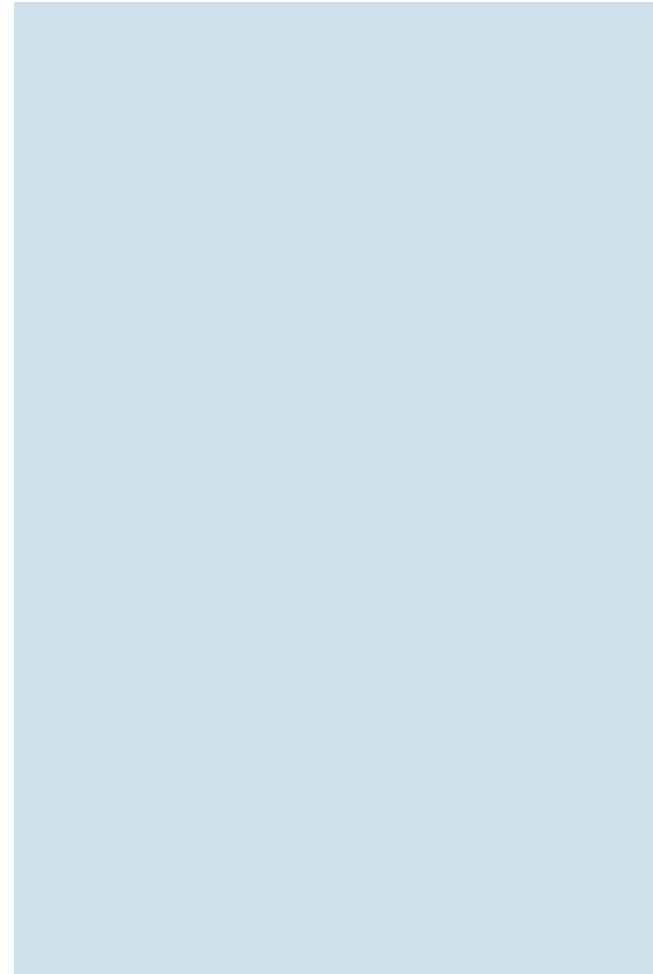
Initial reaction to the UberPOOL concept

- Mitigating against some of these concerns were:
 - Time of travel – during the day may be fine as regards safety
 - Travelling with a friend – safety in numbers



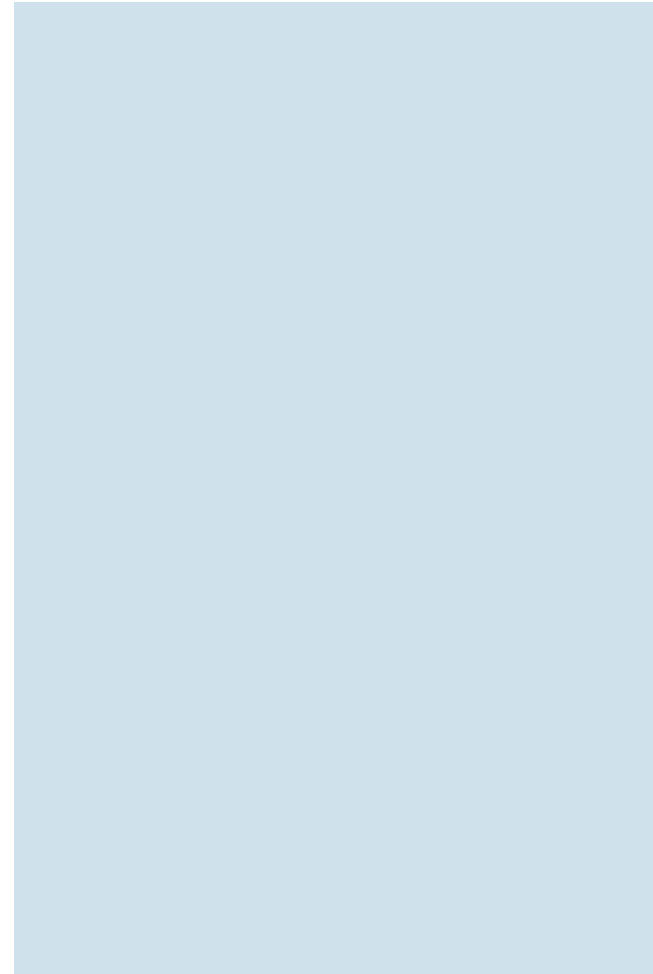
Experiences of UberPOOL

- For those who had used UberPOOL the experience was universally positive
- All in this sample had used the service at the end of a night out:
 - Want to get home relatively quickly and safely
 - Taking a little longer to do so acceptable to save money



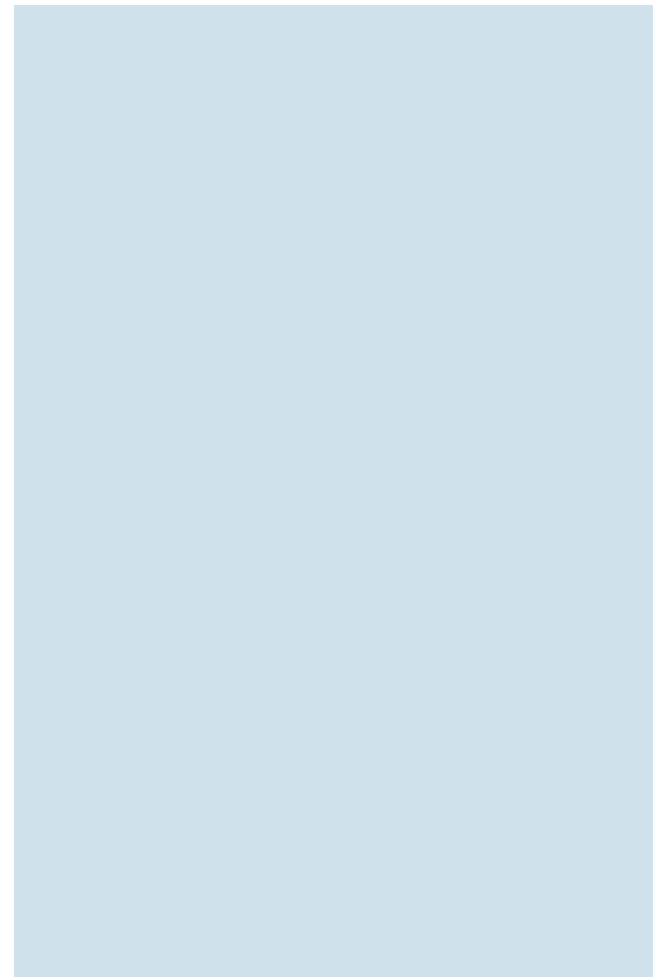
Experiences of UberPOOL

- All felt they had made a good saving on what they would otherwise have had to pay
 - The app shows them what the difference in the two fares would be
 - All saved more than ten pounds on their journeys
 - But for some a saving of five pounds would be enough
- And all felt only ten to fifteen minutes at most had been added to their journey time which was acceptable as a trade off to save some money



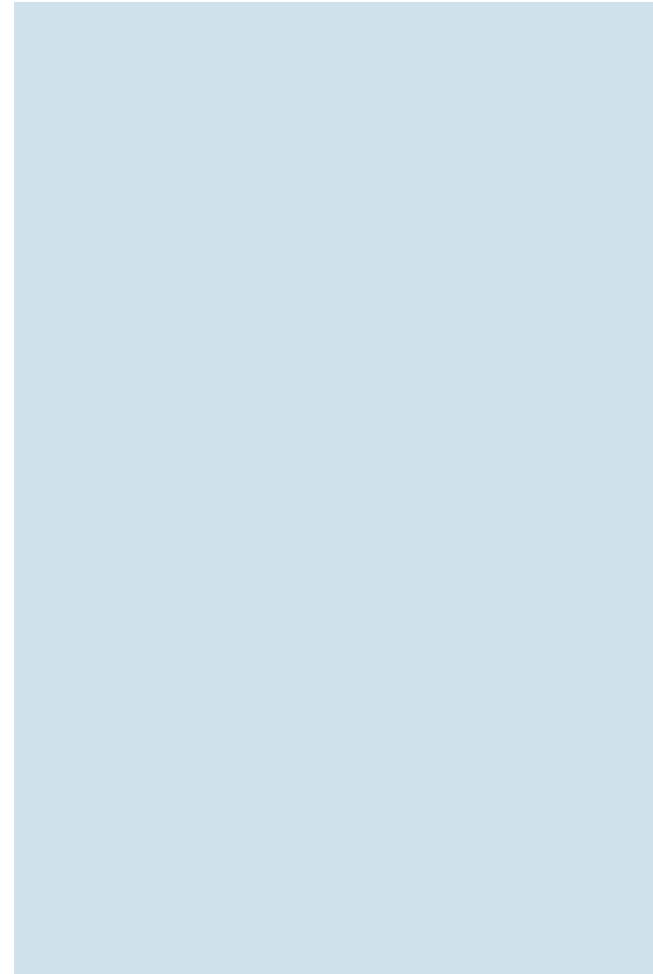
Experiences of UberPOOL

- The overall booking/pick-up/drop-off process worked very well for all with just a few minor confusions and irritations (see end of this section)
- The order in which passengers are picked up or dropped off didn't cause any problems as it was assumed that this would be done logically
 - Whoever the "Uber" was closest to first would be picked up first
 - Whoever's destination the "Uber" came to first would be dropped off first



Experiences of UberPOOL

- For those who had not used UberPOOL there were concerns around what the other passengers would be like and whether they would have to communicate
- Others were 'not like that', were in a good / conversational / party mood, were with a friend so a unit unto themselves

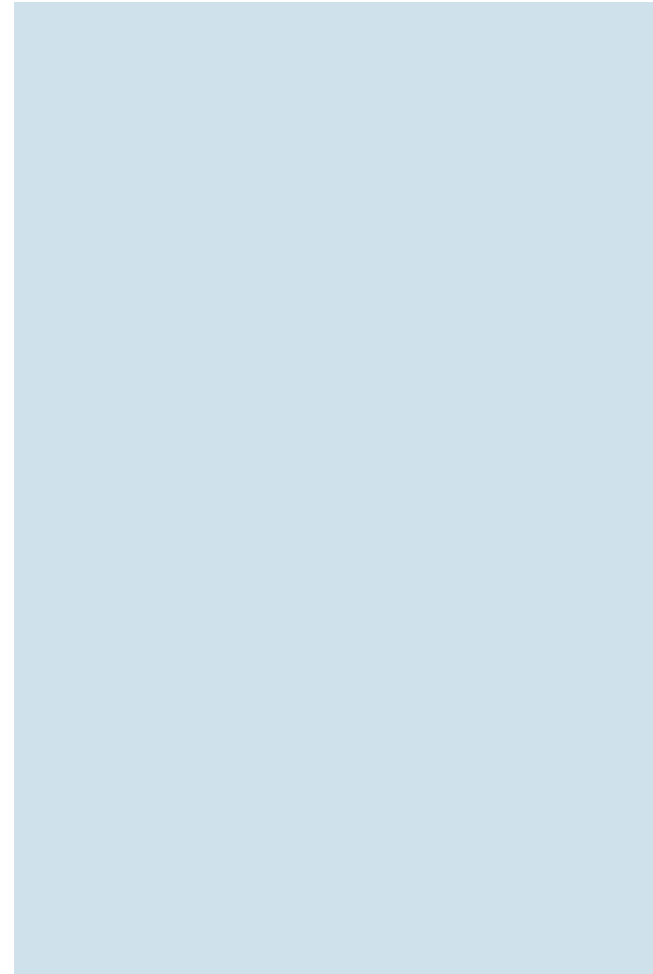


Experiences of UberPOOL

- While the experiences of fellow passengers varied quite a bit, it was generally positive
 - Some just said Hi - did not chat or chatted to their friend
 - Others chatting a lot with the driver
 - Others had interesting chats with fellow passengers
 - And one woman had an 'Uber party'
 - All women in the "Uber" – all were coming back from different bars / parties etc and were in a good mood – ended up singing to songs on the radio
 - She felt like the party continued in the "Uber" whereas normally the night feels over once you get in a black cab

Experiences of UberPOOL

- The only concerns were brought up by one woman
 - She had a momentary safety concern when being dropped off – feeling that fellow passengers knew where she lived
 - Felt slightly odd that fellow passengers already knew her first name when she entered the vehicle
- But these were momentary thoughts

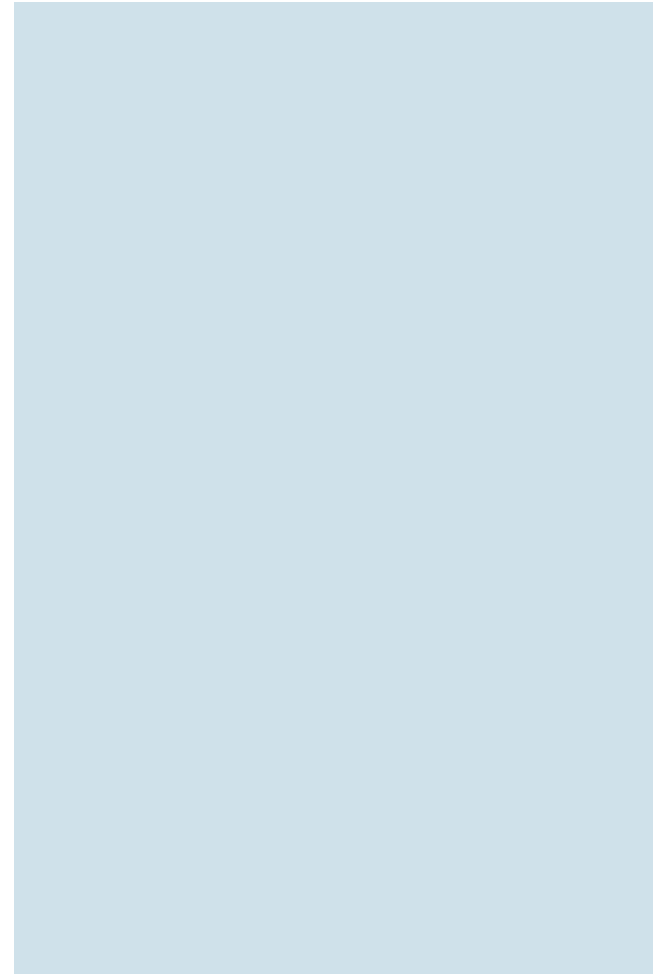


Experiences of UberPOOL

- Some had booked UberPOOL but then had their reservation cancelled at the last moment – this was a bit irritating / annoying
 - They then had to rebook for a normal “Uber” and wait for it
- But it was largely accepted
 - If a fellow sharer cancels the black cab driver is not going to take you somewhere for a shared fare – uneconomic for them
 - It is easy enough to get another “Uber” quickly

Experiences of UberPOOL

- And some had their booking honored even though no one else got in – a very pleasing result!
- Some details of the service also could confuse
 - If you were picked up with someone did you have to be going to the same destination?
- However these irritations and confusions were largely considered to be just ‘par for the course’ - you would understand the system better as you used it, and cancellations rarely happened so ok

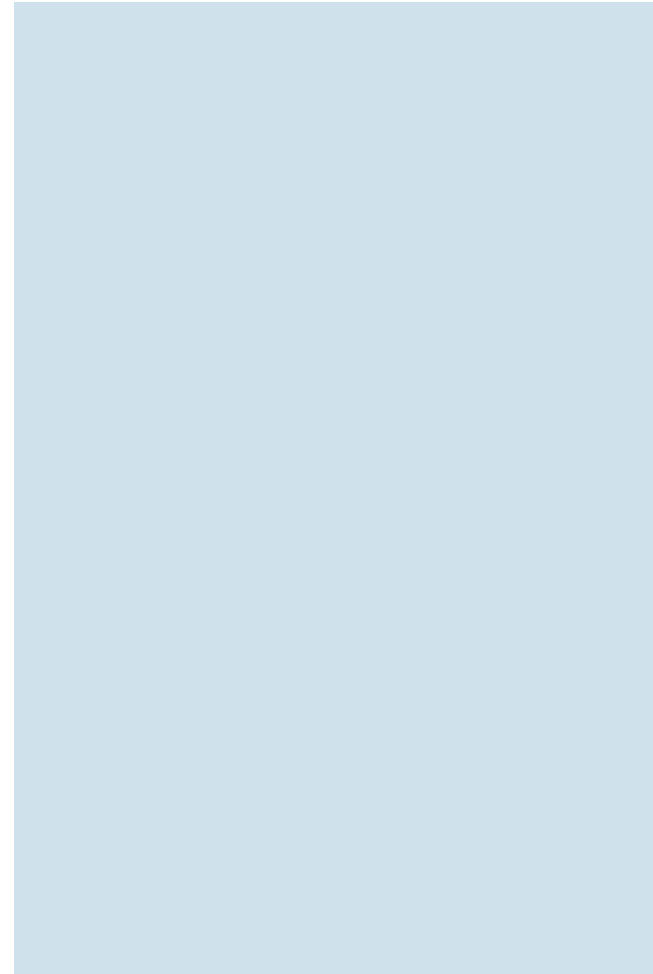


Ridesharing – When and why?

- The key reason for using a ridesharing service is to save money
 - Savings of over five or ten pounds – more for some
 - For going on long/expensive trips – e.g. to the airport - but would have to carefully time this
 - Want to save money but you still want the convenience / comfort of a black cab or minicab vehicle
- When spending extra time travelling did not matter and very little extra time was added to your journey
 - When time isn't so important e.g. at the end of night on the way home
 - Everyone going to the same big event (a concert/festival) - so save money for no extra inconvenience

Ridesharing – When and why?

- For when black cabs or minicabs were at a premium, less available:
 - Very busy times (New Years Eve) or during surge pricing on Uber

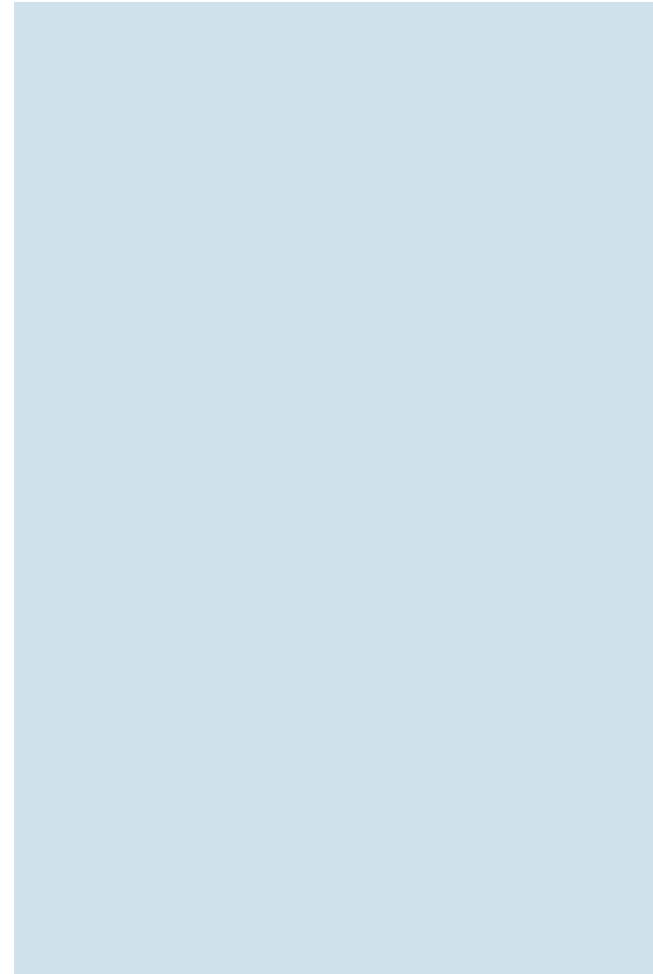


Ridesharing – When and why not?

- Not for when time is of the essence
 - Going to work or to work appointments
 - When you need to be somewhere at a specific time
- Or when the cost saving isn't significant
 - The minimum saving to make it 'worth it' was seen as five pounds but for others it was ten pounds or more
- Not for when other public transport, especially the Tube, is available
 - Though ridesharing is cheaper than a black cab or minicab for oneself travelling by bus or especially Tube is cheaper still
 - And is often quicker than a black cab or minicab, let alone one that picks up and drops off other passengers

Ridesharing – When and why not?

- During rush hour or other busy traffic times
 - A black cab or minicab trip at rush hour can take a long time without also having to pick and drop off fellow passengers

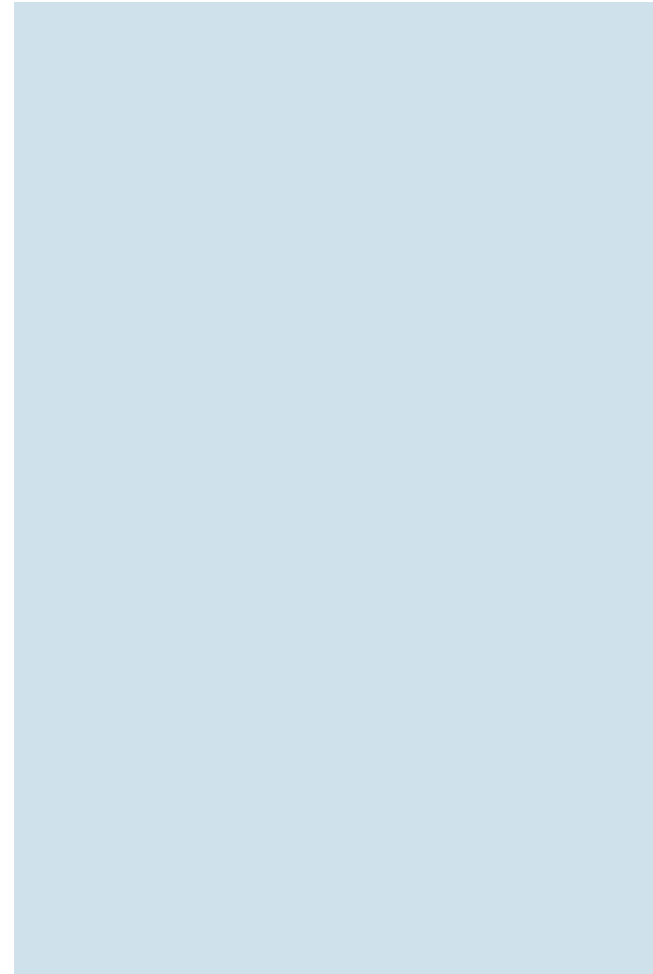


Ridesharing – Potential Benefits

- The main motivator for using ridesharing is cost saving, otherwise people wouldn't bother using it
- You still get all the benefits of a regular black cab or Private journey but save some money, all for very little, if any, extra inconvenience
- Other potential benefits were seen to be:
 - Environmental benefit – black cabs been used to their full capacity so less cars on the road and less pollution
 - Congestion benefit – less black cabs meant less congestion – quicker, more pleasant journey

Ridesharing – Potential Benefits

- Seen as a nice to have by some but of little interest to others and not motivating without cost savings
- A benefit for one person was the sociability of the UberPOOL experience – made a normally ‘boring black cab trip’ much more fun



Ridesharing – Issues & Concerns

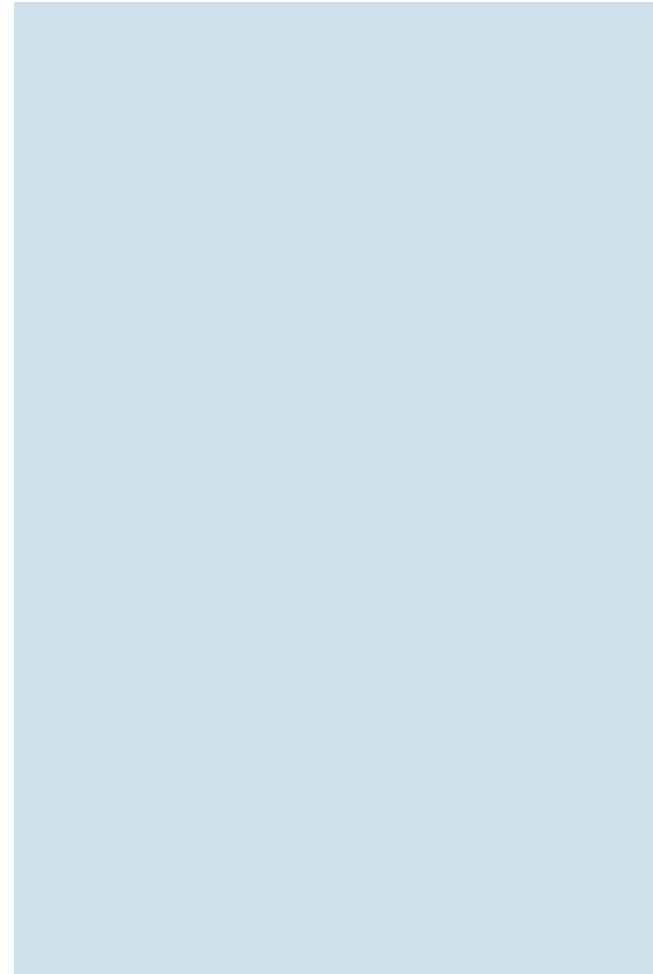
- Those who hadn't tried ridesharing were more inclined to have issues or concerns
- Safety, harassment, 'social' reserve, and security were the main concerns these people had with the prospect of ridesharing
- Some women were particularly concerned about safety - even though it was accepted something unsafe was unlikely to happen
 - The idea can feel wrong – seems to go against what one is taught as a child – 'do not get in a car with a strangers' –
 - There could be real safety worries if the fellow passenger was a man and a bit 'weird' or 'bad'
 - May 'jump out' of vehicle and attack you
 - May note where you live and come back to attack you

Ridesharing – Issues & Concerns

- Harassment was also a concern for some women – either sexual or more generally – though again accepted as not that likely to happen
 - A black cab/minicab vehicle is an ‘intimate’ space which may force you to be ‘closer’ than you want to be to someone (out of politeness) and possibly give them the ‘wrong idea’
 - Even without engaging with a fellow passenger they may act inappropriately in the black cab/minicab vehicle due to the close confines
 - If he knows your name he could ‘research you’ and then harass you (e.g. could find your Facebook page)

Ridesharing – Issues & Concerns

- ‘Social reserve’ was a major concern for both women and men
 - May not want to talk to fellow passengers – black cabs/minicab vehicles are a haven for some, time to relax - but might feel one had to talk
 - May feel physically too close to a stranger especially if in middle seat – people felt the Prius synonymous with Uber were too small

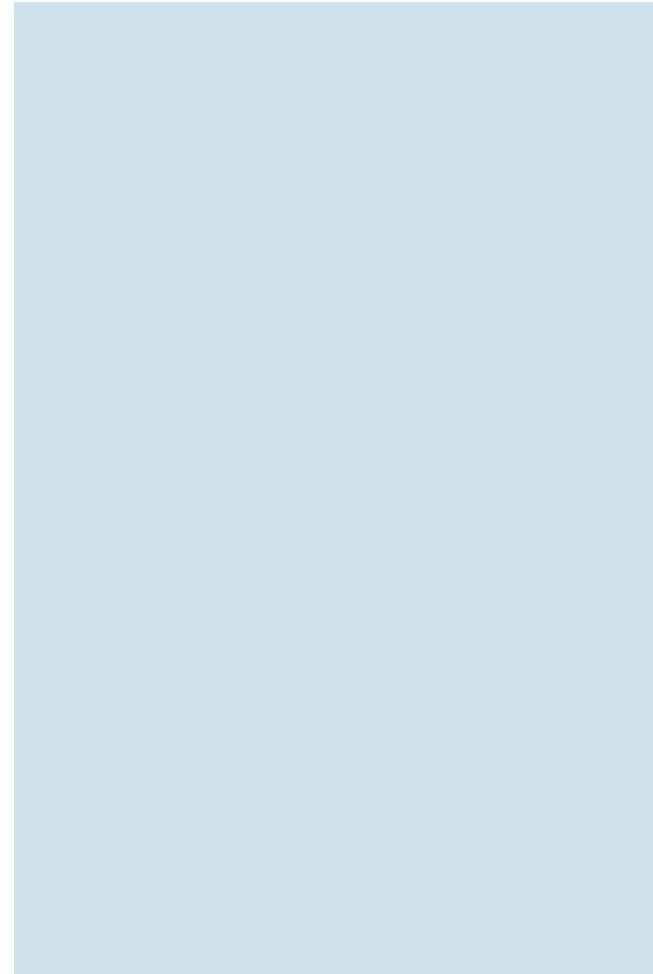


Ridesharing – Issues & Concerns

- Having to endure an ‘unpleasant’ experience was also a concern articulated by both men and women
 - Simply having to share with an ‘unlikeable’ fellow passenger – someone drunk, smelly, boisterous, or odd
 - Possibly getting into an argument
 - Or having to put up with fellow passengers who were arguing amongst themselves
- Theft was also a concern for some – sharing a black cab or minicab vehicle might increase the possibility of being robbed
 - Having ones mobile, wallet, or computer stolen – either pick pocketed or robbed possibly at knife point

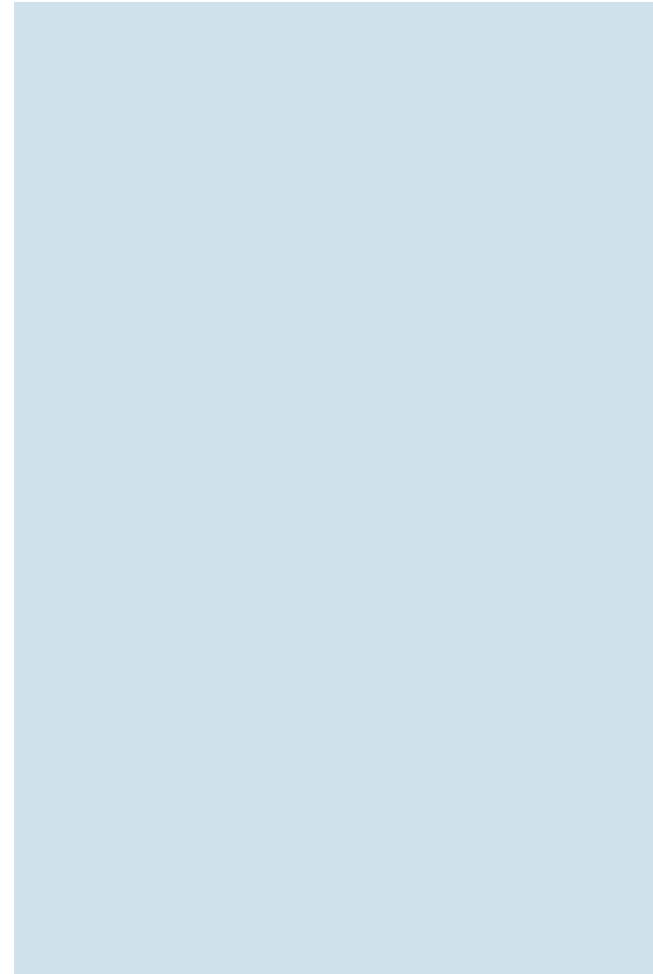
Ridesharing – Issues & Concerns

- In general though, the concerns identified were felt predominantly amongst non-users (and much less so amongst users), and were not necessarily top of mind, but emerged with discussion



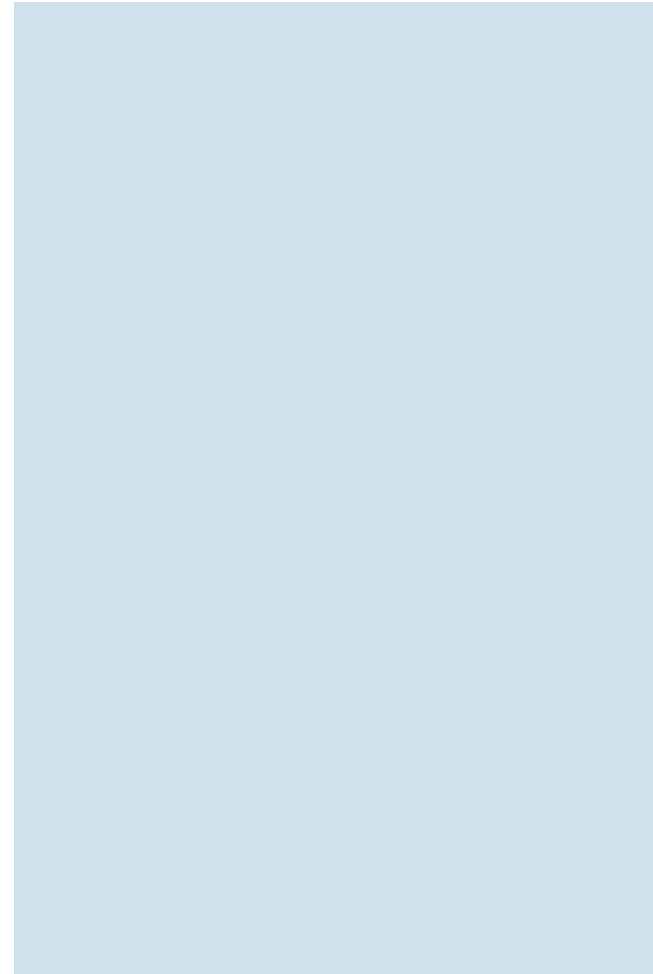
Ridesharing – Views on the Process

- The process itself was not seen to be a concern either for any of the participants
- It was felt the app would dictate how things went and would deal appropriately with all potential issues
 - Show you how much you would save vs. a solo trip
 - Determine who was picked up and dropped off first and last in the most efficient way
 - Work out the likely amount of time added to ones individual journey so that it remained 'reasonable' (extra 10–15 minutes)



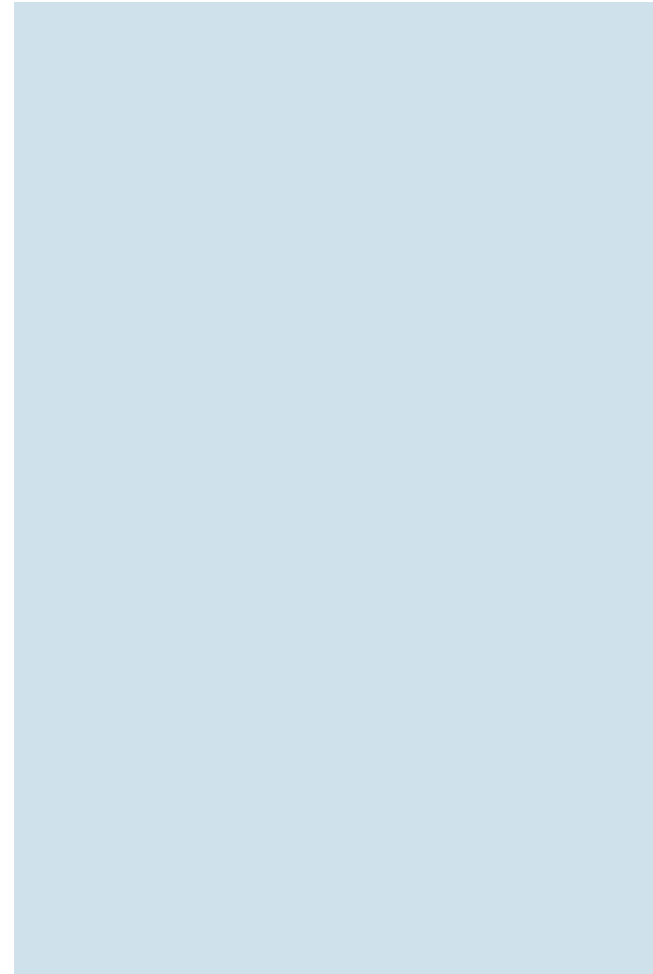
Ridesharing – Views on the Process

- Not much forethought was given to the number of passengers allowed in a vehicle and few knew any real details about this
 - Some thought it was ok for the vehicle to be filled to its legal capacity – assumed to be four passengers
 - Others felt that up to three passengers was enough



Ridesharing – Views on the Process

- Equally there was little if any thought given to the type of vehicle that was allowed to offer ridesharing
 - Most thought just a normal saloon was fine
 - Those that had used the ridesharing option had largely been picked up by a Prius – a car associated with Uber anyway
 - This was thought to be fine – good for the environment and good for the driver – lower car tax & Congestion Charge

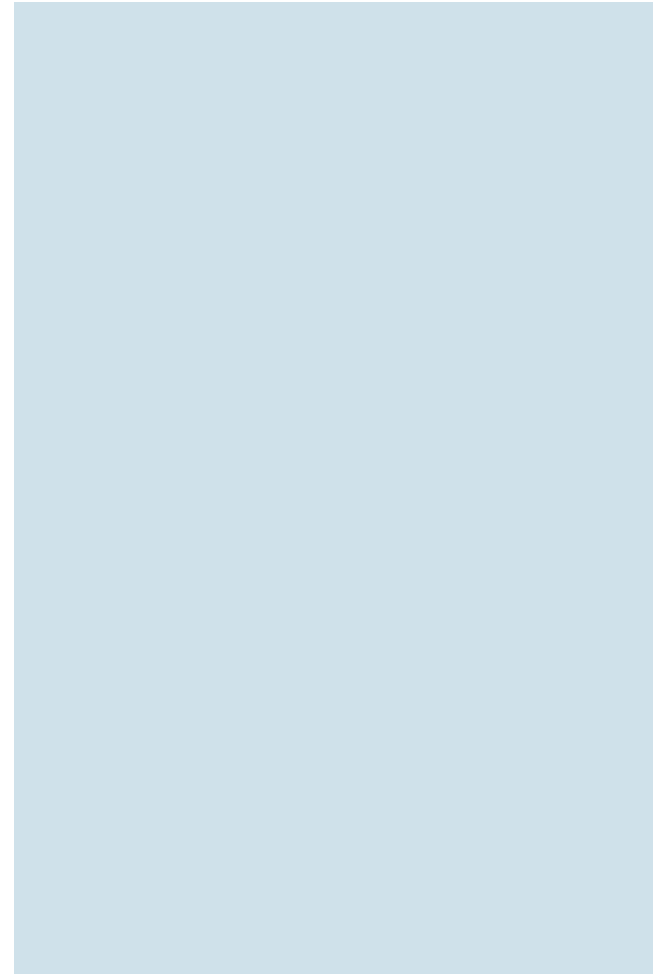


Ridesharing – Views on the Process

- It was a surprise to most that fellow passengers would know each others' names (on UberPOOL)
 - Some were OK with it if it was only first name – especially men
 - Some especially women felt a bit uneasy about it – felt 'weird'
 - And on reflection even some of the women who said they were OK with it initially changed their mind
 - They would prefer if it was up to them whether to tell a stranger their name or not
- Some were also unsure whether you had to be going to the same destination if you were with a friend

Ridesharing – Views on the Driver

- The driver was seen to have largely the same role as any black cab or minicab driver but with some added responsibilities for ridesharers
- In a shared environment they may have to moderate on small issues like choice of radio stations to listen to or passengers who are behaving inappropriately
- All felt the driver should have adequate spoken English and some felt some sort of conflict resolution training would be appropriate (too far for some)



Ridesharing – Views on the Driver

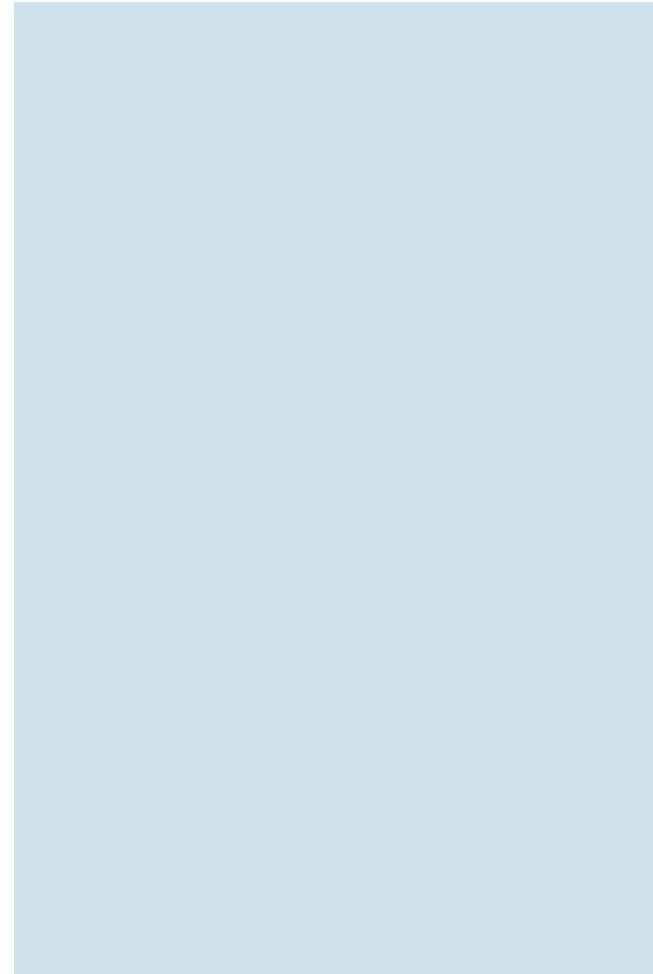
- A number felt they should have access to a panic button in case of trouble in the vehicle – but that would hold true for any black cab or minicab trip
- There was some anecdotal evidence that some drivers may not like UberPOOL much – but the reason for this was not made clear to the passengers

Ridesharing – Views on Regulation

- It was generally thought that TfL regulated both black cabs and minicab
- But it was unclear to many who regulated Uber:
 - TfL?
 - DfT?
 - Self-regulation?
 - All three?
- Either way ridesharing services were not seen to need separate regulation
- Much of the ridesharing process could be self-regulated by the companies that were offering it
 - They would have to make it work well to be successful

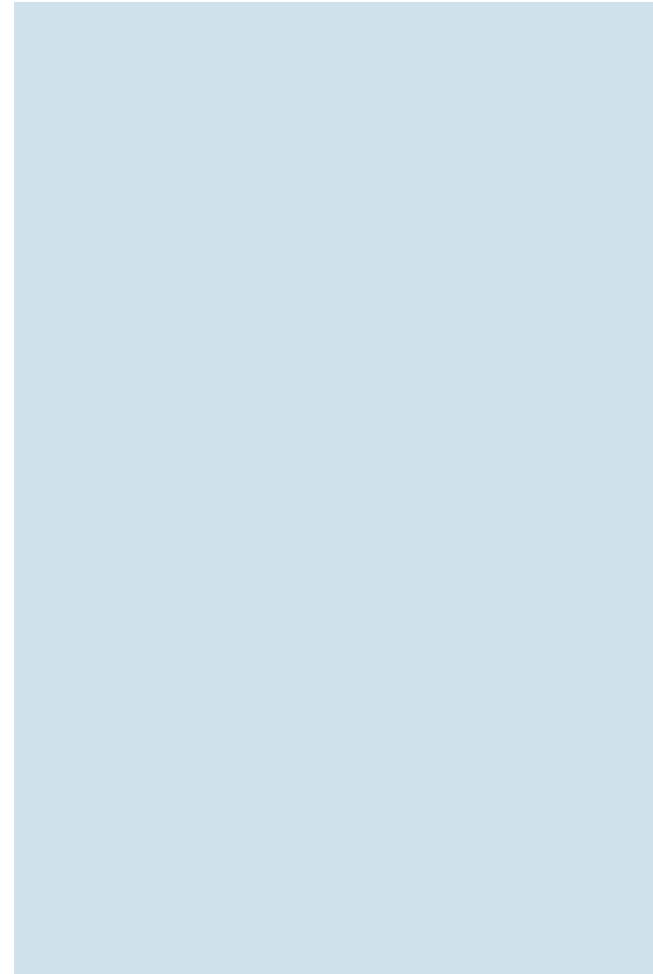
Ridesharing – Views on Regulation

- Any official regulation should be ‘light touch’
 - Any regulation would add to costs
 - Uber would regulate itself well whether with normal Uber or UberPOOL as it is a private company that has to deliver for passengers if it wants to be successful
- However as the discussion continued some did start to think that a certain amount of regulation would be beneficial



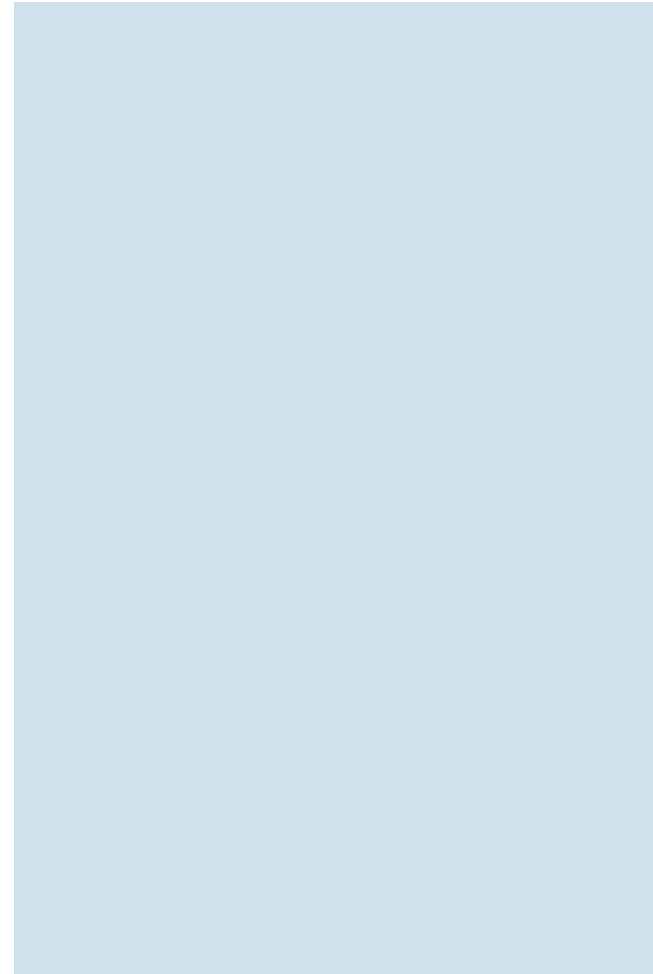
Ridesharing – Views on Regulation

- Some felt that:
 - Drivers should have to have had some conflict resolution training – and that the company (Uber) should pay for this
 - Passenger names should not be shared via the app with fellow passengers unless prior permission was given
 - Panic buttons – good for all drivers but especially for drivers offering ridesharing as there may be potential for more conflict due to strangers sharing



Ridesharing – Views on Regulation

- It was also felt by some that regulation by an independent organization such as TfL could engender public confidence in ridesharing services
- The public could be made aware of TfL's role in this by a pop up window on the app prior to booking or a TfL sticker on a vehicle window



Ridesharing – Views on Regulation

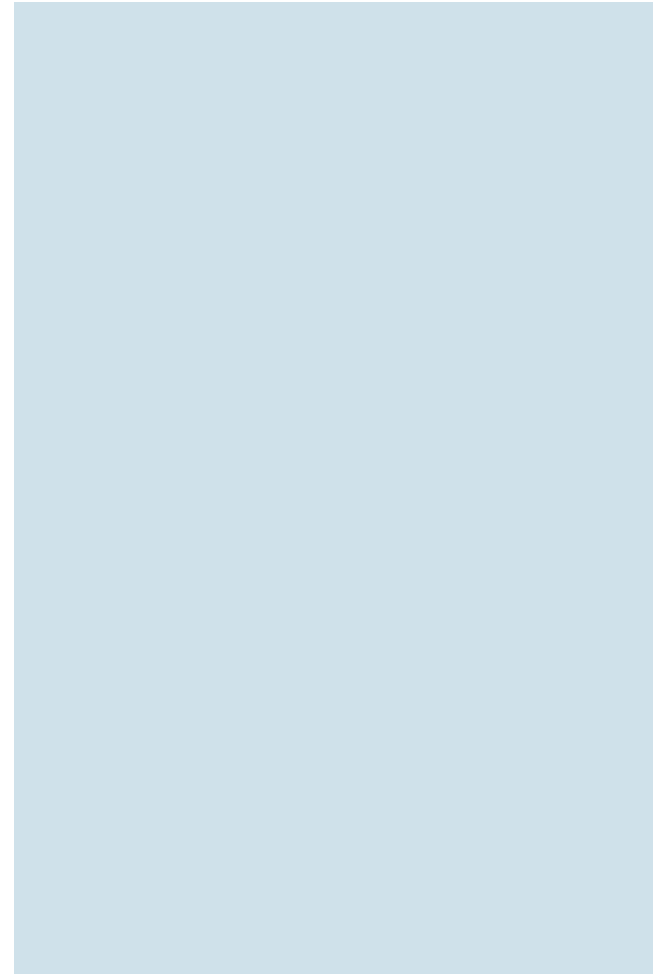
- There were some initiatives that people felt Uber should initiate themselves or be encouraged to do so by bodies like TfL, for example:
 - Offer vehicles that only picked up female passengers, especially at night, possibly with female drivers too
 - On mixed gender shared trips, allow women to opt to be dropped off last regardless of where they lived so as not to allow fellow passengers to know where they lived
 - Impress upon drivers that they should be moderators / interveners if something went wrong in their Ubers – they are the ‘Captain’ of the ship

Ridesharing – Views on Regulation

- However these initiatives were less about official regulation and more about encouragement from bodies such as TfL
- Complaining about ridesharing services such as UberPOOL was thought to be no more difficult than complaining about Uber or similar services in general
- Uber were seen as very good at addressing complaints in regards to fares

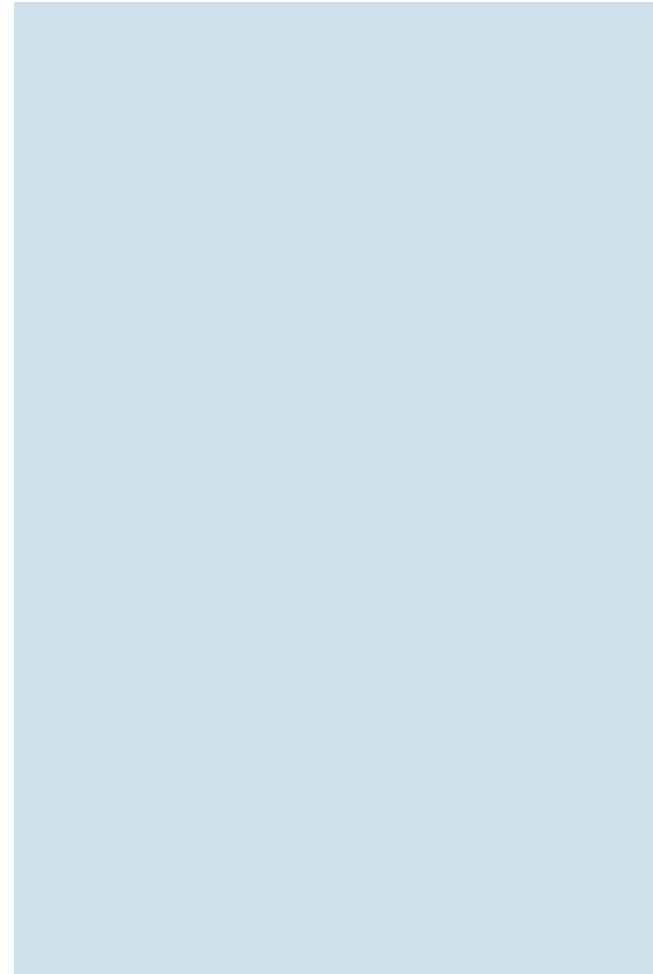
Ridesharing – Views on CCTV

- Views on having CCTV in ridesharing vehicles were mixed
- Some felt they would feel safer if there was CCTV
 - May put people off behaving badly
 - There would be clear evidence recorded if they did
- Others did not want it
 - Felt uncomfortable being filmed /invades personal privacy
 - Would do nothing to prevent things happening at the time if things did 'kick off'
- In the end most felt it should be offered as an option that passengers could choose to have or not have



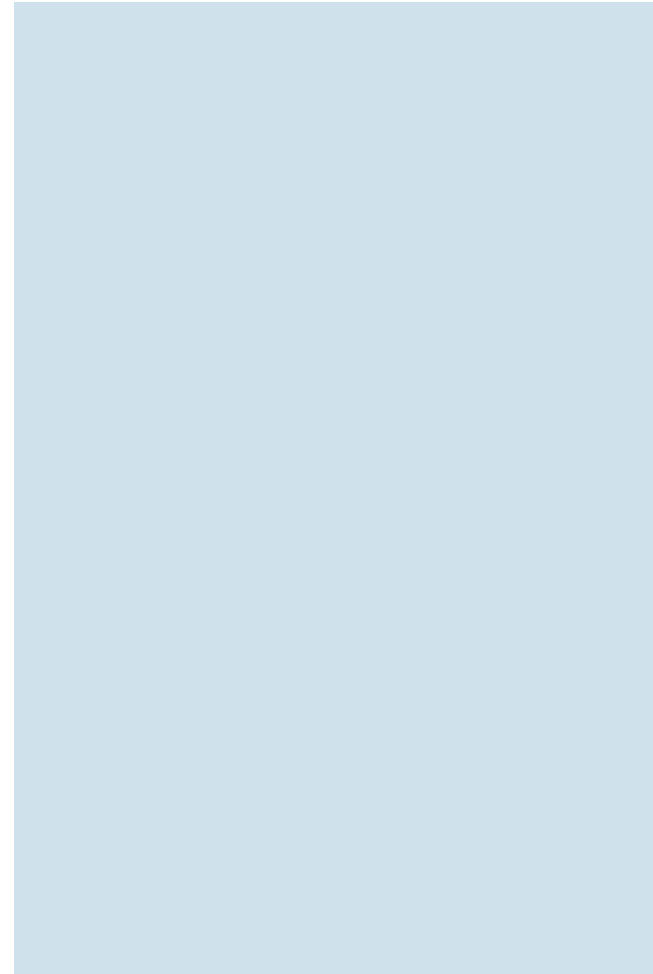
Ridesharing – Views on CCTV

- There was general consensus that CCTV should be installed by the firm (Uber) and footage sent directly to them and only be accessible by them – not the driver
- It should be regulated by TfL and data protection bodies as to its use and how long it can be kept



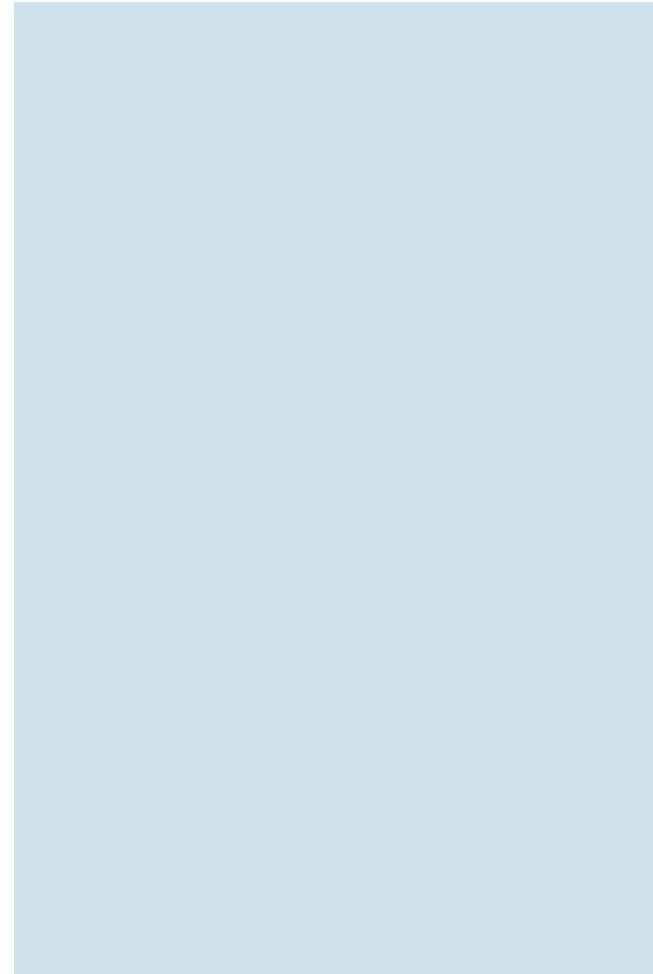
Ridesharing – Views on the Future

- Most could see a future for ridesharing developing assuming the cost saving was motivating enough
- And only at specific times...
 - When travel time mattered less - such as at the end of a night out when most in these groups were using UberPOOL
- And for others there would have to be greater sense of the service being regulated to address their concerns – safety, security etc.



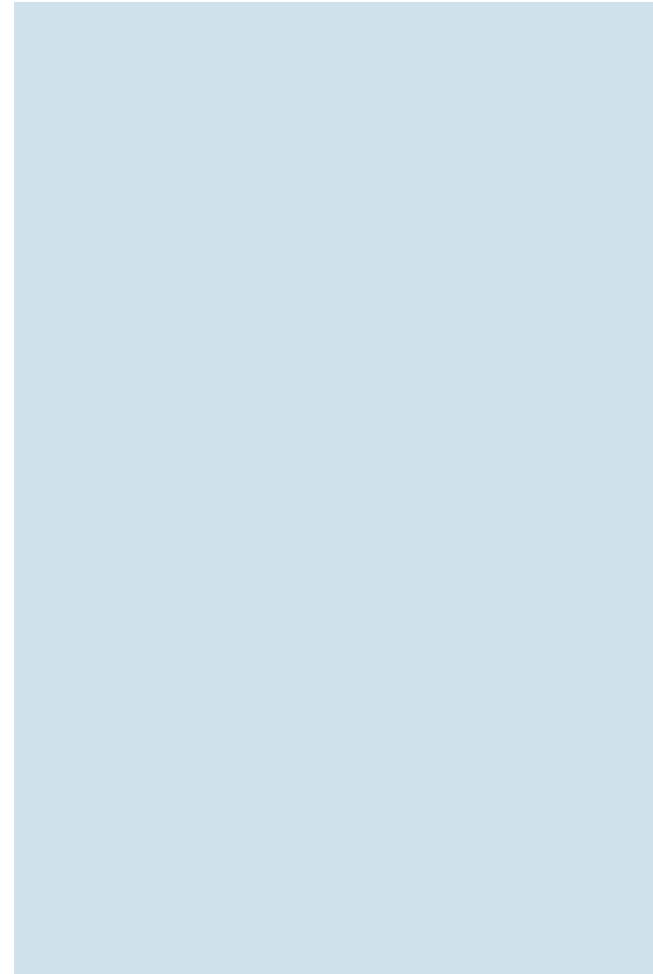
Ridesharing – Views on the Future

- It wasn't generally felt that ridesharing would have much affect on other public transport
 - If you were happy to use the Night Bus you would still be happy to use it – still much cheaper than ridesharing options
- Ridesharing would be more likely to take journeys from solo black cab trips specifically



Ridesharing – Views on the Future

- Other developments in public transport might inhibit the growth of ridesharing, particularly the advent of the Night Tube
 - Could be quicker and cheaper to use than a black cab or minicab whether shared or not
- The idea of a similar ridesharing service being offered by black cabs was not seen to be of interest
 - Even if there was black cab ridesharing it was still seen to be very expensive
 - Black cabs were often hailed in the street so it was unclear how this sort of service might work anyway



Conclusions



Conclusions

- Awareness of ridesharing and UberPOOL:
 - Only one company – Uber - is known to offer minicab ridesharing in London via its UberPOOL option, although one respondent thought another company Lyft also now also offered it
 - Uber itself can be seen to be a category unto itself – not a black cab or a minicab but an Uber
 - Awareness of Uber is largely driven by the offer of Promo codes – discount vouchers – either to try it or when one recommends it to a friend who subsequently tries it
 - Awareness of the UberPOOL option was often generated simply by seeing the option on the Uber app and less by the use of Promo codes
- Understanding of UberPOOL:
 - People know the basic premise – share a vehicle with a stranger for a reduction in your fare
 - But beyond that people largely just assume certain things about the service as opposed to know for sure how it works

Conclusions

- Initial reactions to the UberPOOL concept:
 - People had a variety of reactions to the idea of black cab/minicab ridesharing depending on their experience and their degree of sociability
 - For those who had tried it cost was the main factor – significant savings were possible
 - Some felt a little anxious the first time they tried it – mainly due to a sense of ‘social reserve’
 - Whilst others felt they would be unlikely to try it for a variety of reasons – safety being a key one for women
 - Other reasons for not liking the idea of ridesharing included having to share with potentially unpleasant fellow passengers, a sense of social reserve, possible harassment issues and security concerns

Conclusions

- Experience of UberPOOL:
 - For those that had tried UberPOOL their experience was universally positive
 - They had saved some money on their Uber for little if any inconvenience
 - The process all went very smoothly for most with only a few minor irritations and confusions
 - And although some had a few initial concerns when waiting for their Uber these concerns turned out to be unfounded
 - Experience of fellow passengers was universally positive with some interactions actually adding to the fun of the night
 - The only concerns expressed were fleeting – and revolved around potential safety issues like fellow passengers knowing ones address
 - There were a few irritations and confusions about the process mainly around cancellations and the exact details of some elements of how it worked
 - But these were considered minor and accepted as ‘par for the course’

Conclusions

- Ridesharing – When and Why?
 - Ridesharing is seen as a good option when you want to save a bit or a lot of money but still want to get a black cab or minicab vehicle
 - And when the amount of time spent travelling is not of great importance (within reason, about 10-15 minutes extra)
- Ridesharing – When and Why Not?
 - It is not for when you need to get somewhere quickly
 - Or for when cost savings are ‘not enough’
 - Or when there are other convenient and even cheaper public transport options available

Conclusions

- Ridesharing – Potential Benefits:
 - Saving money is the main reason people would consider ridesharing
 - Other potential benefits of the service such as environmental benefits and less congestion are ‘nice to have’ rather than really motivating
 - An unexpected benefit emerged through experience of using the service – it could make a black cab or minicab journey more fun
- Black cab/minicab Ridesharing – Issues and Concerns:
 - Women can have more concerns than men about the idea of ridesharing
 - Some women are particularly concerned about safety and harassment issues in general
 - ‘Social reserve’ was a concern for both women and men
 - Having to come into contact with strangers was not something people necessarily wanted
 - People were also concerned at potentially having an unpleasant experience
 - Or worse, actually being robbed

Conclusions

- Ridesharing – Views on the Process:
 - The process itself, from booking to dropping off, did not seem to evoke concerns
 - But many just did not think about passenger levels, types of car, luggage levels etc.
 - They just assumed it would all be ‘fine’
 - It was a surprise too many that fellow passengers would be informed of your name by the app
 - Some women in particular did not like this, it made them feel a bit uneasy
- Ridesharing – Views on the Driver:
 - The driver was seen to have added responsibilities towards his passengers in a shared environment
 - Some feel the driver may need some training in conflict resolution to be able to intervene in any passenger disputes

Conclusions

- Ridesharing – Views on Regulation:
 - Most were unsure who regulated Uber and therefore UberPOOL
 - Initially it was felt any official regulation should be ‘light’ – anything heavy was unnecessary and would drive costs up
 - However as the discussion continued some started to feel that a certain amount of regulation would be good for ridesharing services
 - There were some initiatives that people would like to see companies such as Uber offering with ridesharing services – such as an option for female only passengers
 - But it was more a case of encouraging them to do this rather than officially regulating on these sorts of matters
- Ridesharing – Views on CCTV:
 - Views on CCTV varied widely
 - Some felt it would add to safety, others that it could breach personal privacy
 - Either way if CCTV was installed it should be owned and operated by the company not the driver

Conclusions

- Ridesharing – Views on its Future:
 - Most could see black cab/minicab ridesharing developing and more people using it simply to save money on black cab/minicab journeys
 - They saw the business for ridesharing coming from solo black cab journeys as opposed to from other forms of public transport
 - However public transport initiatives such as the Night Tube were seen as something of a threat to ridesharing and black cab and minicab in general
 - A black cab ridesharing service was not thought to be of interest amongst these participants as would be too expensive

The Impact of Apps on the black cab & minicab Markets

- For those using apps the market has fundamentally changed (Uber particularly)
- In fact, from the customer point of view the market can be categorised as follows:
 - Black Cabs, the traditional London black cab
 - Addison Lee – a specific service which is positioned somewhere between a Black Cab and a minicab, with a focus on the business market
 - Uber – through its scale and marketing reach Uber has successfully differentiated itself from other apps
 - Minicabs – booked either using an app other than Uber, by phone or in a minicab office
 - Chauffeur drive – a relatively niche product for special occasions
 - Unlicensed cabs – that is, cabs that tout for business illegally.
- It seems that the spending on apps comes partly from user's budgets for social activities: this implies that in terms of transport it is not a 'zero-sum' game but that apps can expand the market

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