steer davies gleave

App use surveys - April 2017

Transport for London

Final Report

April 2017

Our ref: 22975301

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Transport for London

Our ref: 22975301
Client ref:

Prepared by:

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Contents

Executive Summary

Study Context

Transport for London – Taxi & Private Hire commissioned Steer Davies Gleave to conduct a comprehensive survey of black cab and minicab app use in London. This survey collected information about app users and non-app users and the impact of app use on their travel habits.

Methodology

1,000 black cab and minicab users in London completed an online survey during September 2016 using the Research Now panel. The sample of survey respondents was targeted at black cab and minicab users. As the sample was not representative of the London population the data was reweighted by Mosaic[1] prior to analysis.

Key Findings

App User Demographics

- Generally, app users had a higher average income than non-app users. 15% of them had a household income of less than £25,000 whereas there were 27% of non-app users this income band.
- App users tended to be younger than non-app users: 70% of app users were under 44 years old, compared to just 34% of non-app users.

Black cab and Minicab Use

- In the 12 months up to October 2016 35% of app users and 22% of non-app users reported a decrease in the amount they use black cabs.
- In the 12 months up to October 2016 19% of app users and 9% of non-app users reported an increase in their use of minicabs.
- 22% of app users used a black cab at least once a week compared to 7% of non-app users.
- 25% of app users used a minicab at least once a week compared to 6% of non-app users.

App Use

- The most popular black cab app was Hailo which 31% of black cab app user respondents currently use.
- The most popular minicab app was Uber which 76% of minicab app user respondents currently use.
- Since starting to use apps, 40% of respondents reported increasing their minicab use and 28% reported a reduction in their use of black cabs.
- Since starting to use apps, a third of respondents reported decreasing their use of night buses.
- 44% of respondents reported that app use had meant that they increased the number of trips they take for leisure or entertainment purposes.
- 47% of app users reported having more than one app and the most commonly chosen reason for this was to compare prices (21%).

[1] Mosaic is a geodemographic classification which classifies individuals into groups at an individual postcode level.

- The most common issue arising from app use was the vehicle being delayed (36%); this was followed by having an issue with the driver (23%) and having a technical problem with the app (17%).

Changes since the research was undertaken

It's worth noting that since the research was undertaken there has been a number of changes in the market – reflecting the dynamic and fast moving nature of the market:

- Karhoo is no longer operating.
- Hailo has merged with MyTaxi.

2 Introduction

Background

2.1 This report presents the results of a survey of London residents concerning their use of black cab and minicab smartphones apps which was undertaken in October 2016. This follows on from qualitative research that was carried out previously where Londoners were invited to a focus group to provide insight on their use of black cab and minicab apps.

2.2 The focus groups highlighted a number of recurring themes from which the following hypotheses were devised:

- The use of apps increases the number of trips made by people, as well as re-distributing them between modes;
- Apps can divert trips from a range of different modes;
- Customer loyalty towards apps is high and some minor issues are tolerated as long as customer service remains good;
- Loyalty to an individual app is less secure and some users have multiple apps on their phone;
- Over time, brand loyalty may become more of a factor so there are likely to be differences in behaviour depending on how long the individual has been using apps; and
- Uber, Hailo and other apps may in effect, be becoming a new category of black cab/minicab.

2.3 This report will look to see if the additional quantitative research proves or disprove these hypotheses.

This report

2.4 Following this introduction, Chapter Two describes the methodology for the survey and presents the profile of survey respondents (which is designed to reflect the population). Chapter Three then looks at travel behaviour including how often users make use of black cab and minicab services compared to other modes.

2.5 Chapter Four considers app usage with Chapter Five exploring the impact of mobile apps on respondent's use of black cabs and minicabs.

2.6 Chapter Six offers insight into the different mobile apps, whether respondents have had an issue and if that has had an impact on their loyalty to a specific service.

2.7 Chapter Seven provides overall commentary on the findings and looks to prove or disprove the hypotheses set out above.

2.8 Please note, where it is possible to draw a distinction, findings for black cabs and minicabs are presented in their own sub-sections. The term 'app users' used in this report refers to users of apps specifically for booking either black cabs or minicabs.

3 Methodology and profile

Overview

3.1 The app use survey involved an online questionnaire that was targeted at a panel of individuals that were more likely to use black cabs, minicabs and apps. The research was undertaken during October 2016. A total sample of 1,000 respondents was obtained.

Methodology

Questionnaire

3.2 The online questionnaire was sent to participants recruited using the Research Now panel. It was designed to take respondents between 15 and 20 minutes to complete and covered the following topics:

- General usage of black cab/minicab services;
- Changes to usage of black cab/minicab services;
- Changes to usage of other transport modes;
- Awareness of black cab/minicab applications;
- Which apps they had used/stopped using;
- Issues and their resolution; and
- Awareness of ridesharing[2] services.

Sampling

3.3 Profiling was undertaken using Mosaic, a geodemographic classification which classifies individuals into groups at an individual postcode level. The profiling was designed to particularly target Londoners who were existing users of black cab and minicab services. Similar Mosaic types were groups clustered together and the clusters differed in terms of their use of black cabs and minicabs, and their propensity to use black cab/minicab booking apps.

3.4 Table 3.1 below shows the breakdown of respondents based on the different Mosaic Groups. A summary of the demographics of these Mosaic Groups has been included in Appendix A for reference.

[2] Sharing a black cab or minicab with one or more individuals you don't know e.g. UberPOOL

Table 3.1: Mosaic profile of respondents

Mosaic Group	Number	% of sample	% of London population
A - City Prosperity	315	31 %	32%
B - Prestige Positions	83	8 %	5%
E - Senior Security	21	2 %	2%
F - Suburban Stability	20	2 %	1%
G - Domestic Success	88	9 %	9%
I - Family Basics	14	1 %	6%
K - Municipal Challenge	90	9 %	14%
L - Vintage Value	3	<1%	1%
N - Urban Cohesion	260	26 %	17%
O - Rental Hubs	107	11 %	13%
TOTAL	1,000	100%	100%

Note: See Annex A for more detail descriptions of the different Mosaic Groups

Weighting

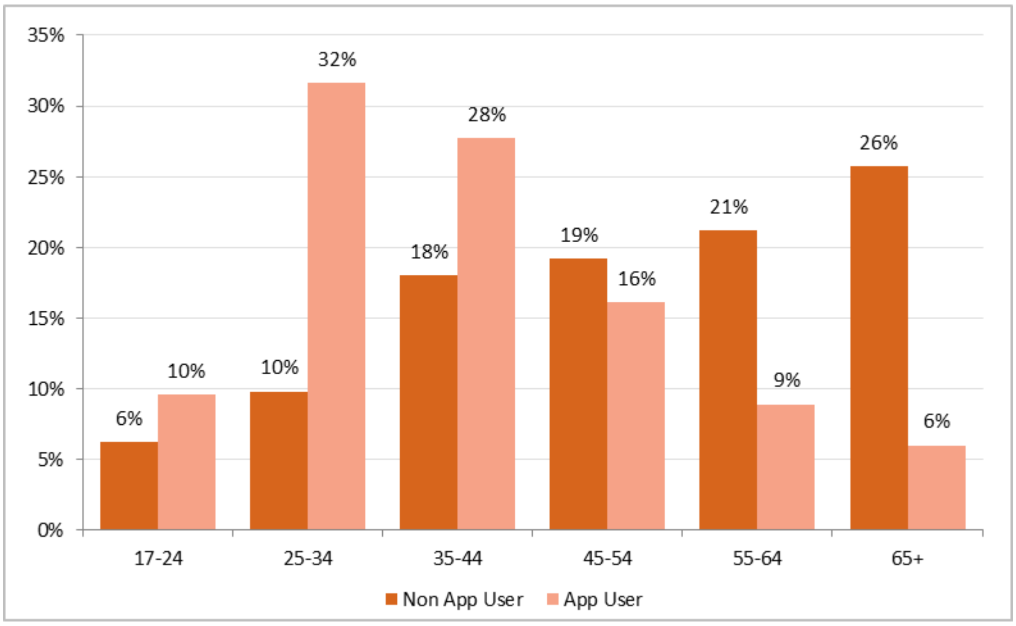
3.5 All data presented in this report is weighted to reflect the Mosaic profile of the London population, as presented in Table 3.1 above.

Profile

3.6 Respondents were asked a number of questions covering demographics and general profiling. Where there are notable differences in the profile of app users and non-app users the results are presented in detail below with a summary section for the other statistics gathered. App users are defined as individuals that responded they have used either black cab or minicab apps. Where a graph shows a sample size of 1,000, all respondents have been included.

3.7 70% of app users are under 44 years, compared to just 34% of non-app users. 32% of app users are within the 25-34 age bracket, with only 10% of non-app users. Over a quarter of all non-app users were within the 65+ category.

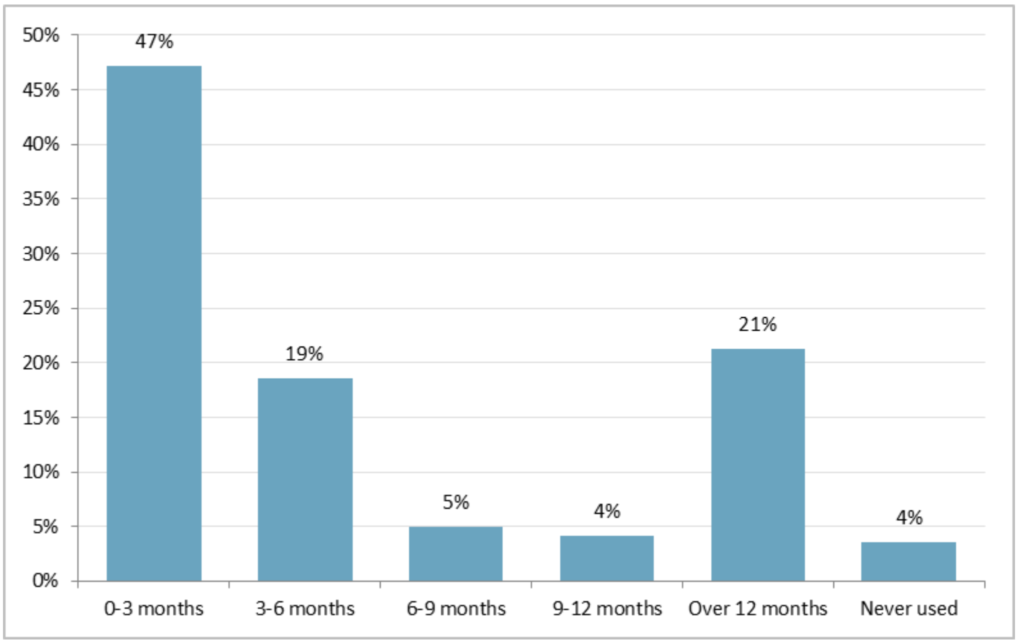
Figure 3.1: What is your age?



Sample: 1,000 respondents

3.8 Two-thirds of those who responded have used a black cab in the last 6 months (66%) – although just over a fifth haven't used one in over a year (21%). 4% said that they hadn't ever used a black cab.

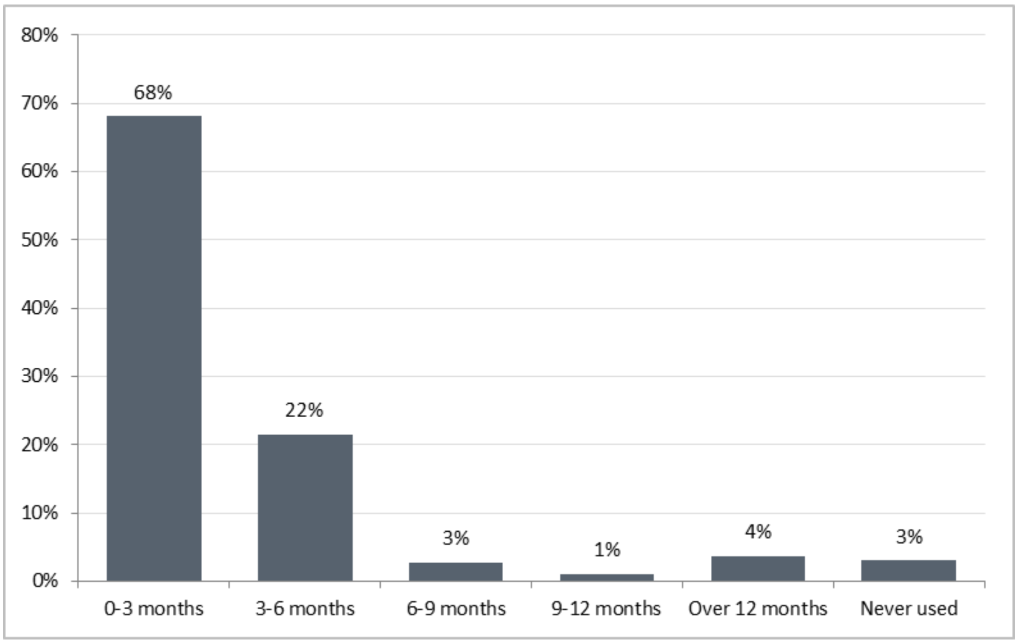
Figure 3.2: When was the last time you used a black cab in London?



Sample: 1,000 respondents

3.9 90% of respondents have used a minicab in the last six months, with 7% stating that they haven't used one in the last 12 months or ever.

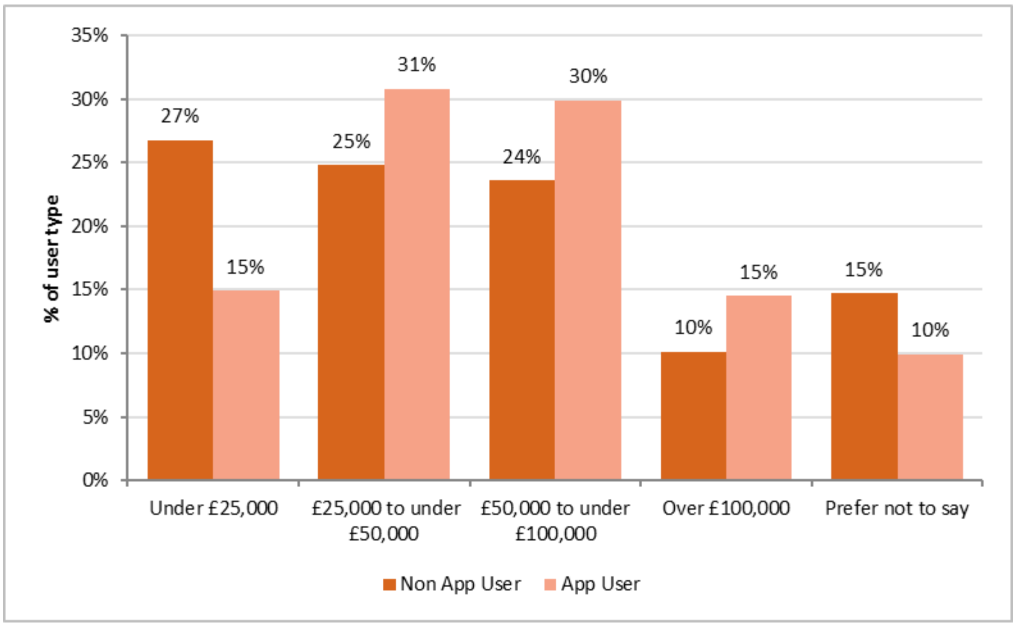
Figure 3.3: When was the last time you used a minicab in London?



Sample: 1,000 respondents

3.10 App users tended to have higher levels of income. 27% of non-app users had a household income of less than £25,000 whereas only 15% of app-users were in this income band.

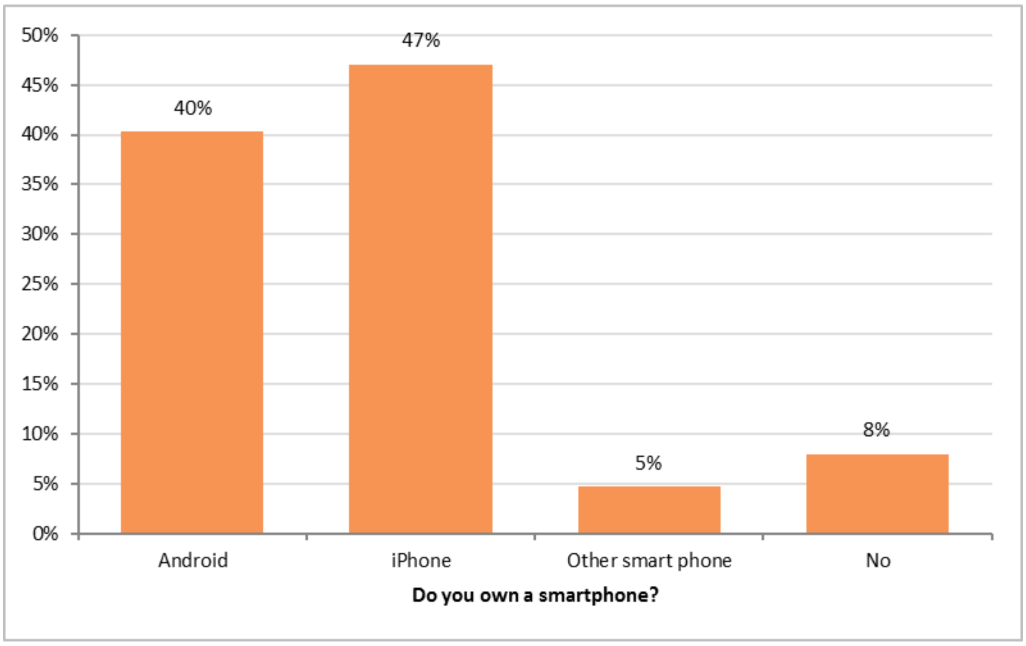
Figure 3.4: Which of these bands does your household income fall into (before tax)?



Sample: 1,000 respondents

3.11 The majority of respondents were smartphone users (92%) with a slightly larger proportion of those being iPhone users rather than Android. In terms of EU market share, as of Summer 2016 , around 75% of mobile users are Android and 19% Apple[3].

Figure 3.5: Do you own a smartphone?

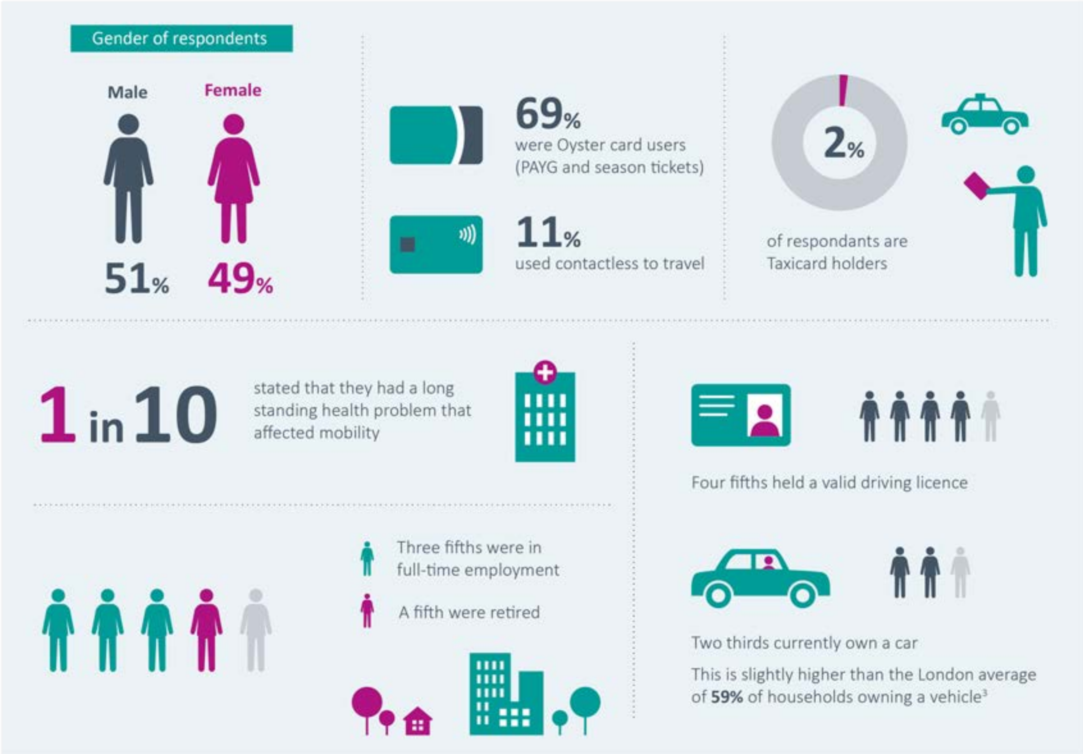


Sample: 1,000 respondents

[3] http://www.telegraph.co.uk/technology/2016/05/17/android-roars-back-in-strongest-growth-in-two-years-as-apple-shr/

3.12 Some of the more general findings are shown in the Figure 3.6 below:

Figure 3.6: General findings from the online panel survey



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4 Table NTS9902, National Travel Survey 2014/15

4 Travel behaviour

Introduction

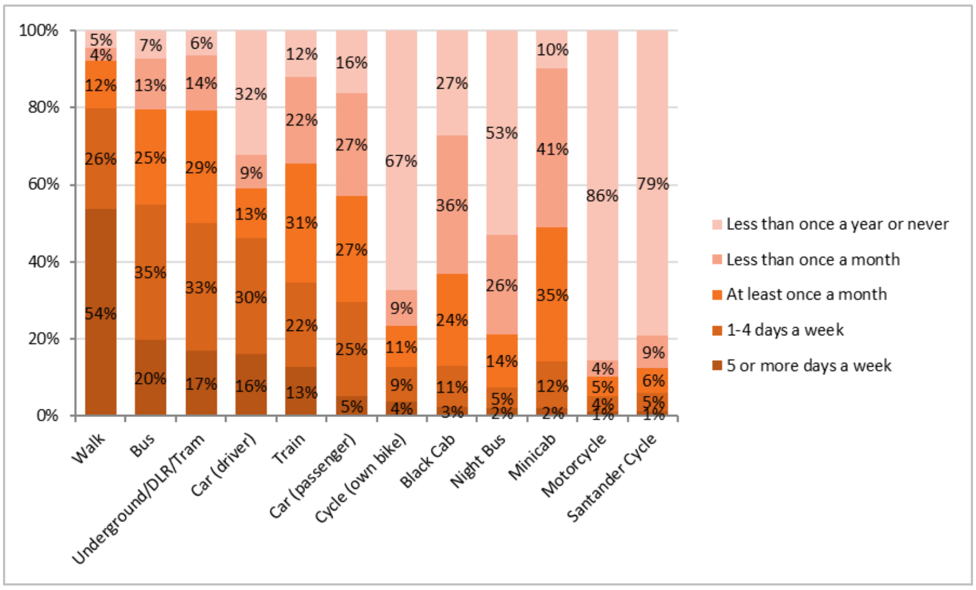
4.1 This chapter identifies the extent to which respondents are using different modes of travel to get around London, followed by a more specific focus on their usage of black cabs and minicabs.

Use of travel modes

4.2 Figure 4.3 shows how respondents use different modes for travelling in London. It shows that:

- Walk is the mode used by the largest proportion of the population: 95% including 79% of people who walk at least once week;
- Bus is the most used motorised mode with 55% of those surveyed using it at least once a week;
- 24% use black cabs at least once a month;
- 35% use minicabs at least once a month;
- 27% use black cabs very infrequently or not at all;
- 10% use minicabs very infrequently or not at all.

Figure 4.1: How often do you use each of these modes to travel around London



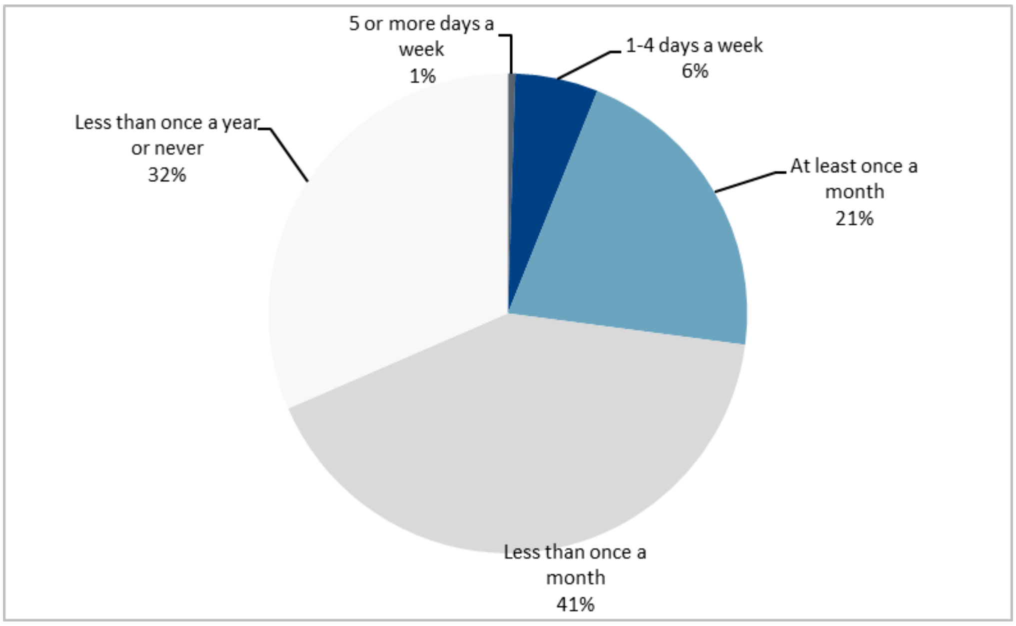
Sample: 1,000 respondents

Black cab

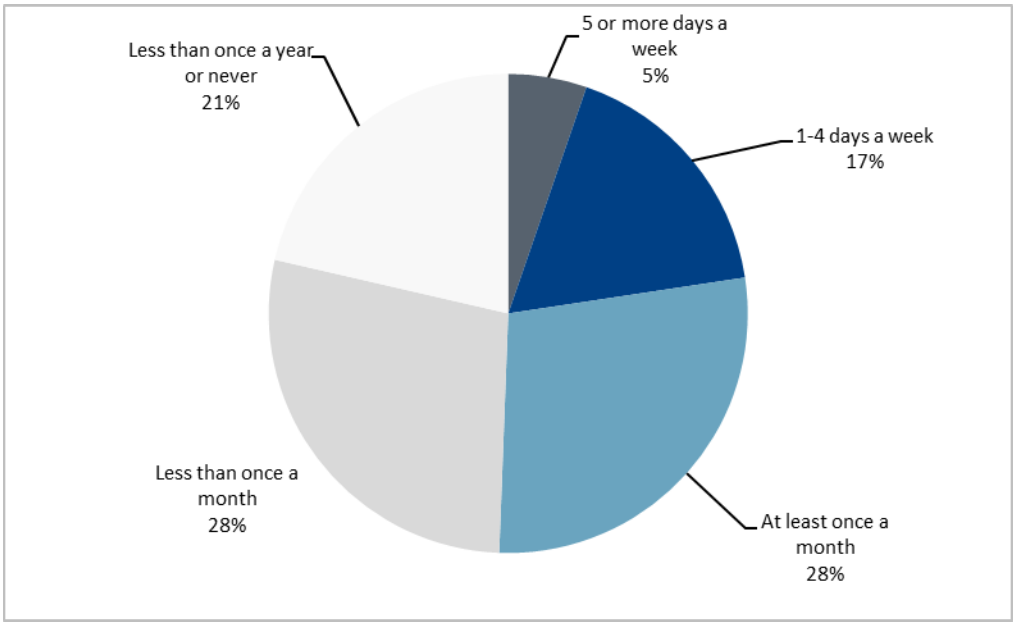
4.3 App users (this includes both black cab and minicab apps) are more likely to make black cab trips more regularly than their non-app counterparts with more than three times as many app users taking a black cab at least one day a week.

Figure 4.2: How regularly do you use black cabs?

Non App Users



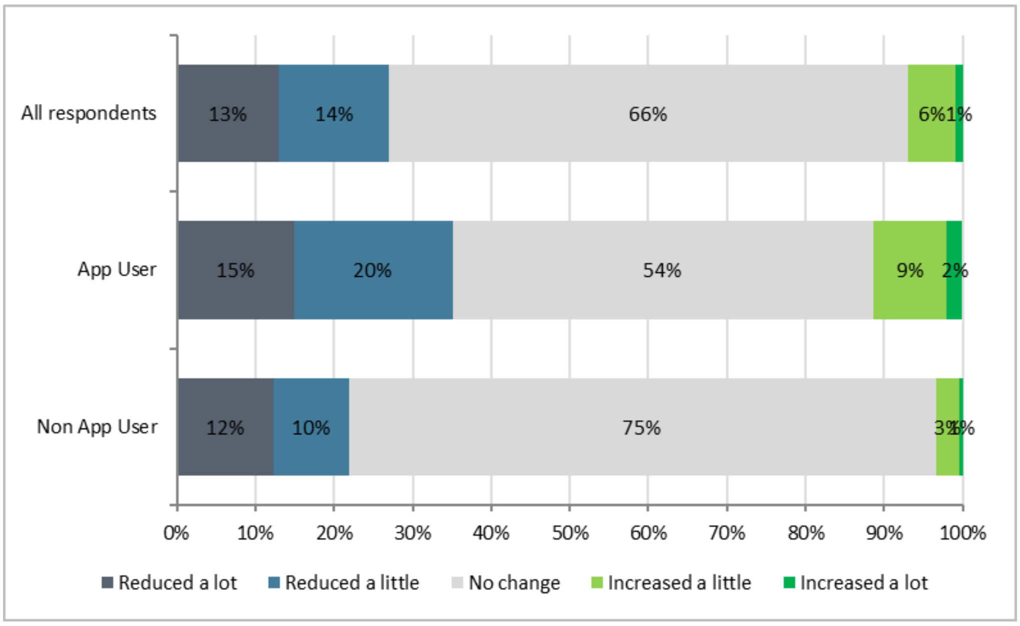
App Users



Sample: 1,000 respondents

4.4 35% of app users have reduced the amount of travel they make via black cabs, but 11% had increased their usage. Conversely, 25% of non-app users suggested that they have reduced their usage, whereas 4% said that they had increased it.

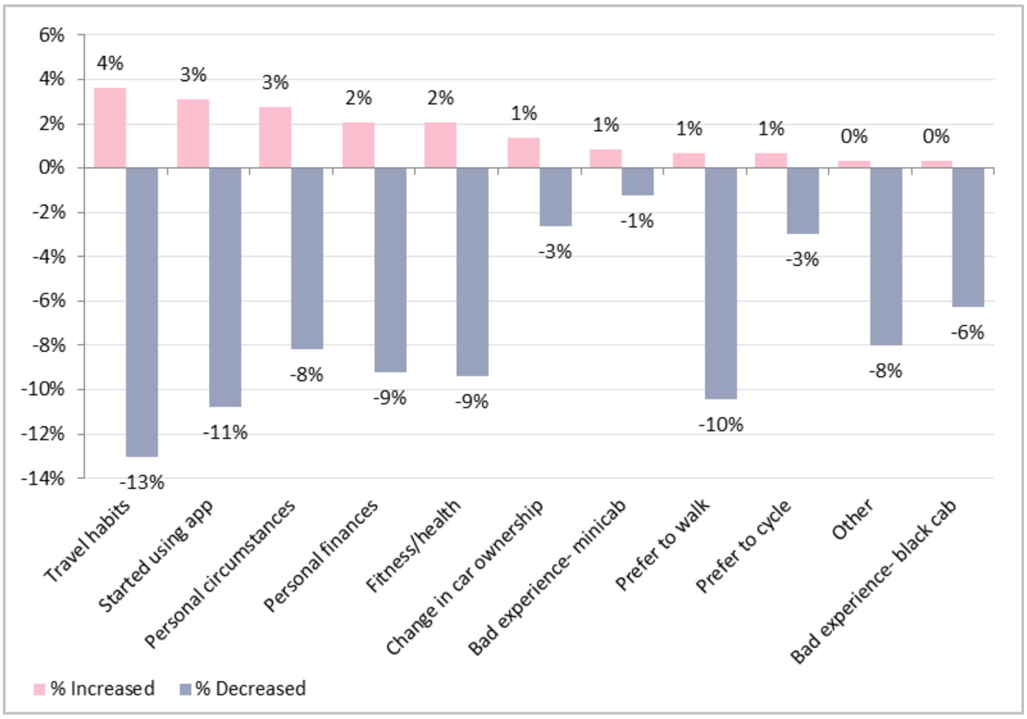
Figure 4.3: In the last 12 months have you changed the amount you travel by black cab?



Sample: 1,000 respondents

4.5 The main reason why people had either increased (+4%) or decreased (-13%) their usage of black cabs was changes to their travel habits, with app usage the second most cited reason with 11% saying this had made them decrease their black cab usage (likely to be due to use of a minicab app) and 3% suggesting this had made them increase it. 10% of respondents also suggested that a preference for walking had made them decrease their taxi usage.

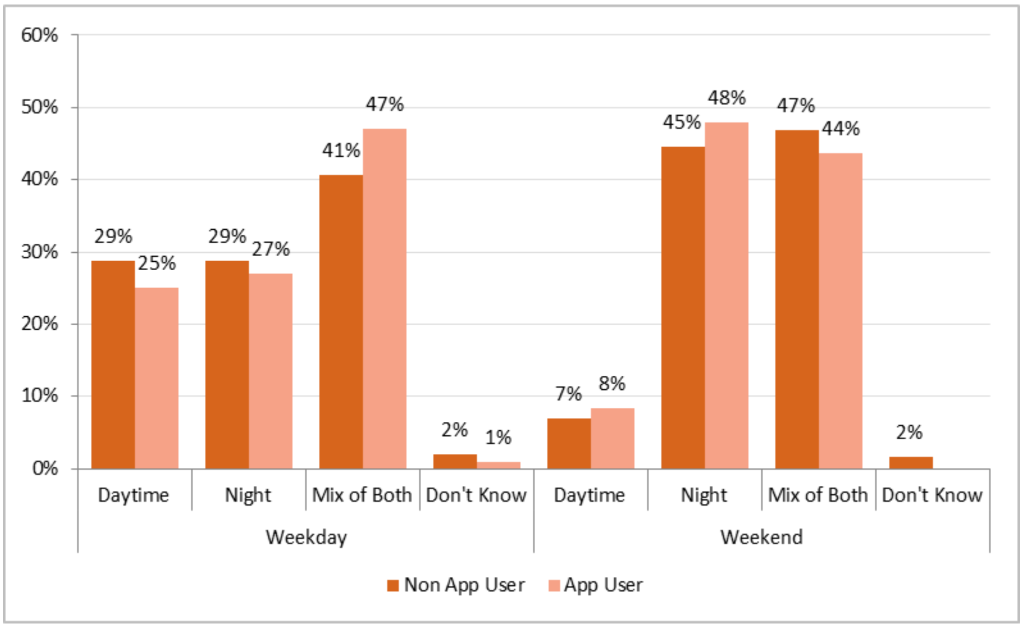
Figure 4.4: You mentioned that you changed the amount you travel by black cab, why is that?



Sample: 576 respondents

4.6 Whether the users was an app or non-app user had very limit impact on their times of travel. During weekdays, app users are more likely (47%) than non-app users (41%) to travel throughout the day in a black cab. At the weekend, app users also more likely to use them for their weekend evening travel (48% vs 45%).

Figure 4.5: Time of journey – Black Cab

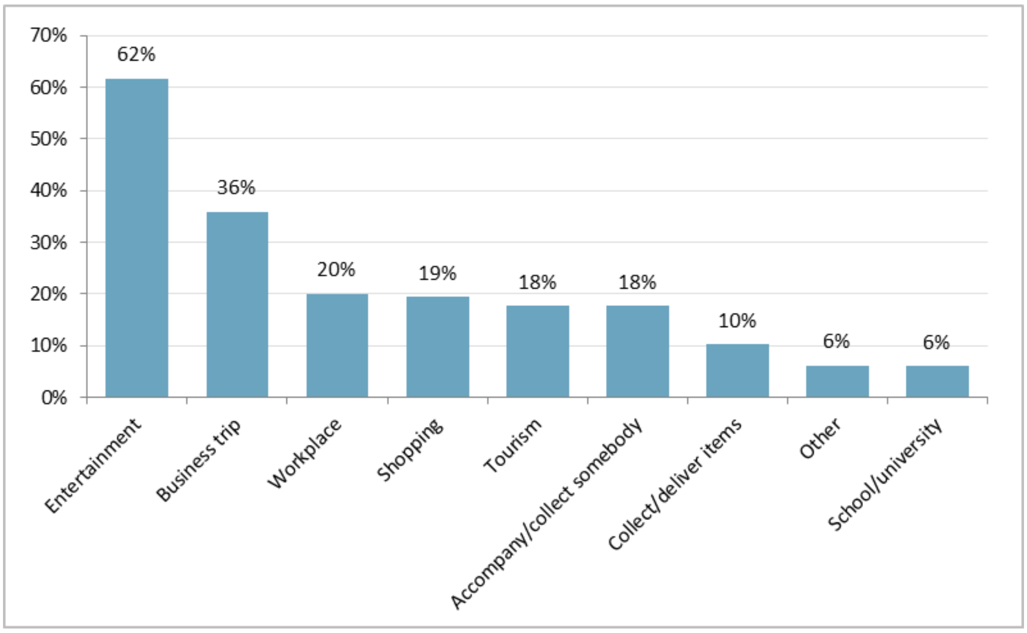


Sample: 629 respondents

4.7 Although not charted, of those surveyed, two fifths of black cab users (40%) said that their journeys were a mixture of both independent travel or with their friends or colleagues. Similar numbers of black cab respondents travelled alone (28%) or with others (29%).

4.8 Just under two thirds of respondents use black cab services for entertainment trips (62%), a third for business trips (36%) and another fifth stating workplace (20%) and shopping (19%).

Figure 4.6: Select the type of trips you tend to make in black cabs

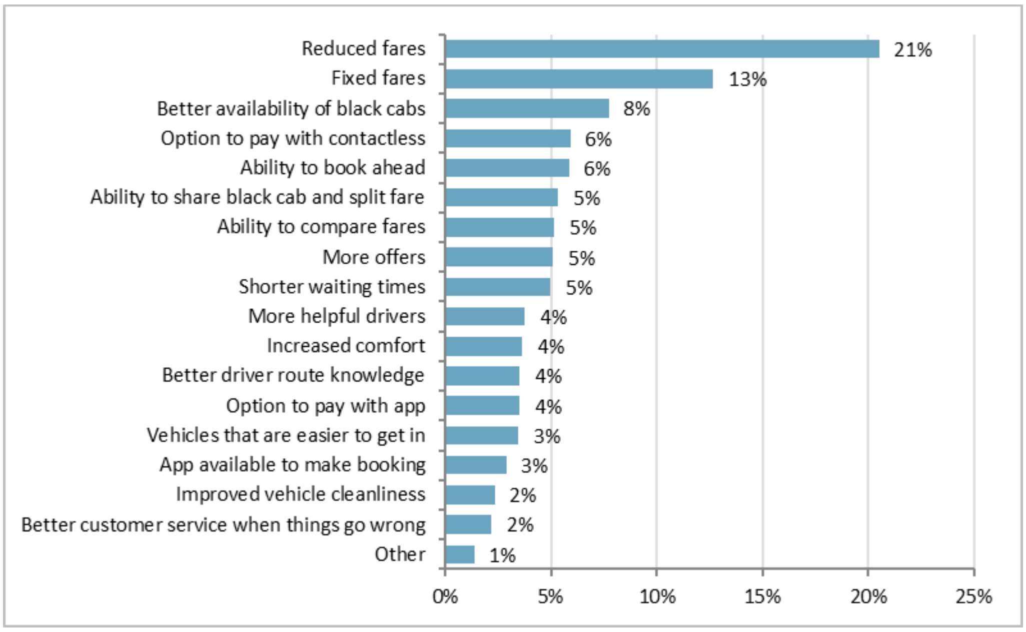


Sample: 659 respondents

Please note, respondents were allowed to select more than one response.

4.9 Over a fifth of respondents stated that they would make black cab trips more often if there were a reduction in fares (21%), with 1 in 7 suggesting fixed fares would increase their usage. 7% also suggest that they would be more likely to use black cabs if there was an app available to make a booking or an option to pay with an app.

Figure 4.7: Thinking about how often you use black cabs, select up to 3 options that would make you use them more often?



Sample: 659 respondents

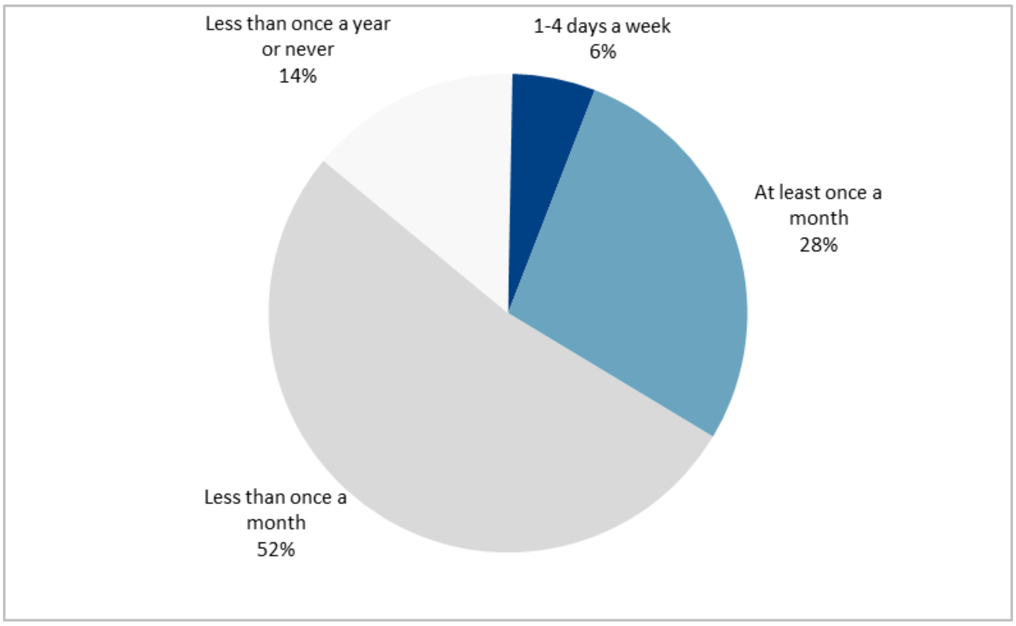
Please note, respondents were able to select up to three options.

Minicab

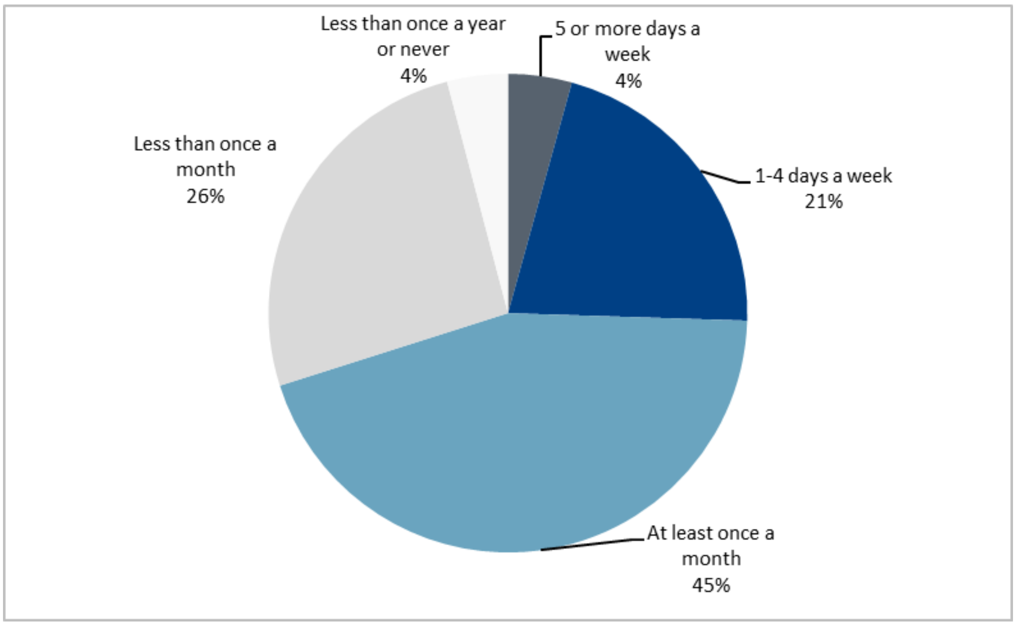
4.10 There is a direct correlation between app use and minicab use. Four times as many app users make a trip at least once a week compared to their non-app counterparts. Non-app users are also four times more likely to use minicabs infrequently or never.

Figure 4.8: How regularly do you use minicabs?

Non App Users



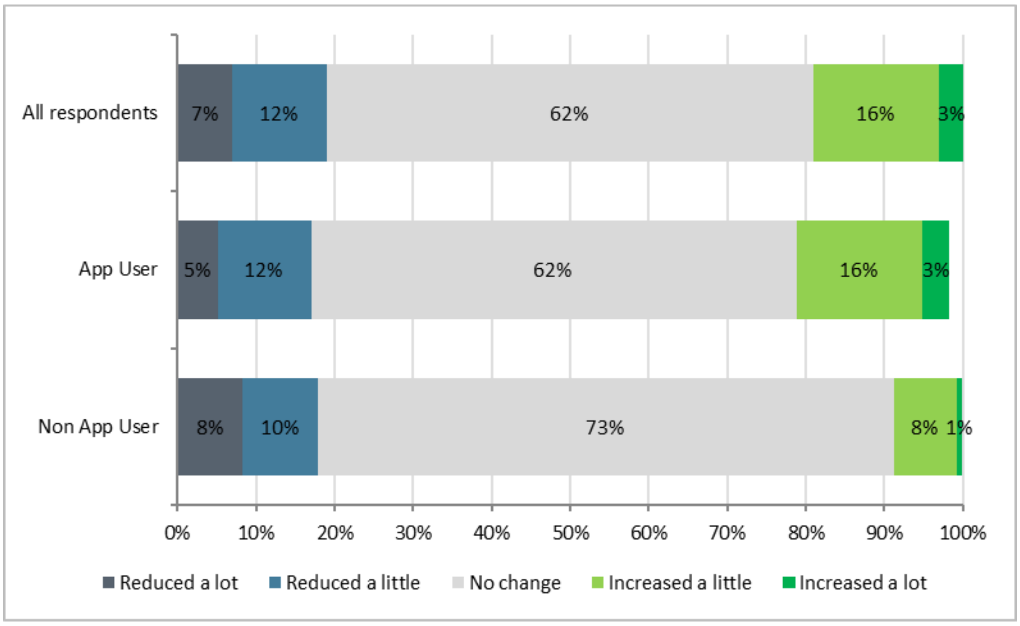
App Users



Sample: 1,000 respondents

4.11 19% of app users suggested that they had increased the amount they travel via minicab in the last 12 months, compared to 17% who said that they had reduced their usage. For non-app users, 18% said that they had reduced their overall usage, whereas 9% thought that they had increased their usage. Please note, that respondents weren’t asked to quanitiy the level of change.

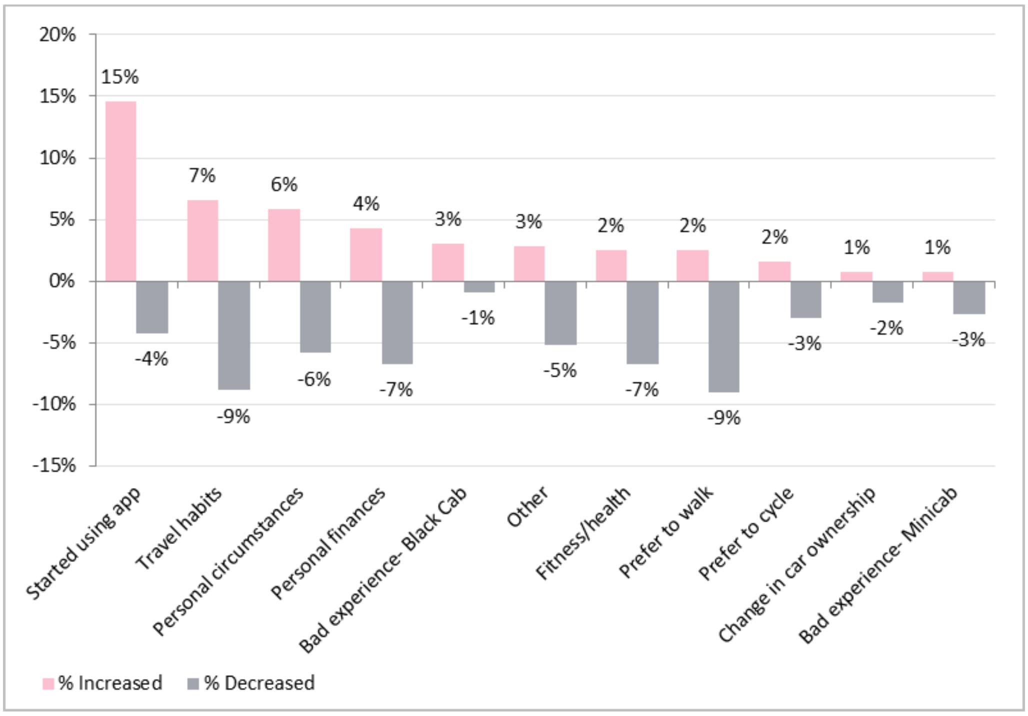
Figure 4.9: In the last 12 months have you changed the amount you travel by minicab?



Sample: 1,000 respondents

4.12 The reason cited most often for an increase in the usage of minicabs (15%) was usage of apps, although 4% suggested that this had decreased their usage. For 9% of respondents, walking was stated as reason for reducing usage. Changes to travel habits (7%) and personal circumstances (6%) were the other most common responses for an increased use of minicabs.

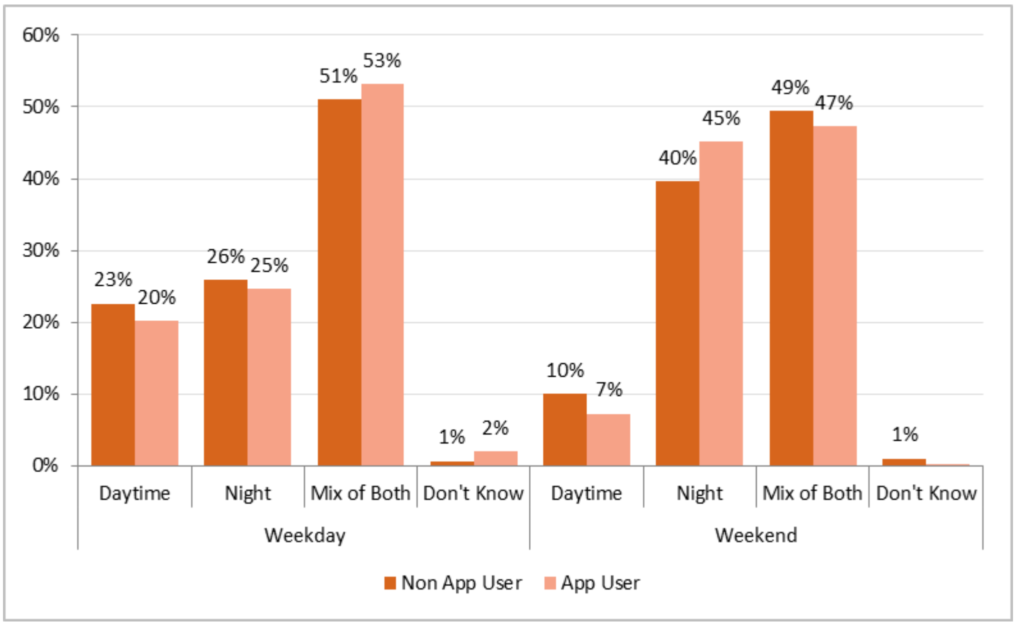
Figure 4.10: You mentioned that you changed the amount you travel by minicab, why is that?



Sample: 564 respondents

4.13 There were negligible differences in the times of day that non-app users will make use of minicab services compared to app users. The most marked difference is on weekend evenings, where 45% of app users make all their minicab trips, compared to 40% of non-app users.

Figure 4.11: Time of journey – Minicabs

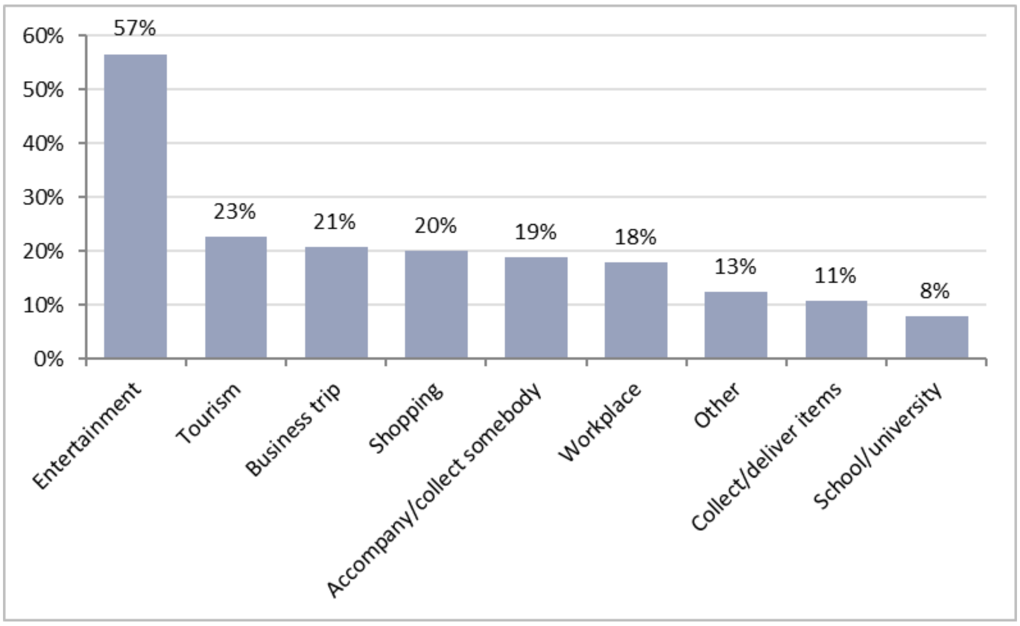


Sample: 845 respondents

4.14 Although not charted, minicab users are more likely to travel with other people (31%) than alone (24%), although most respondents stated that they made a mix of journeys alone or with others (43%).

4.15 Almost three fifths of respondents said that they used minicab trips for entertainment (57%) purposes, with just under a quarter stating leisure (23%) and a further fifth stating business trips (21%) and shopping (20%).

Figure 4.12: Select the type of trips you tend to make in minicabs

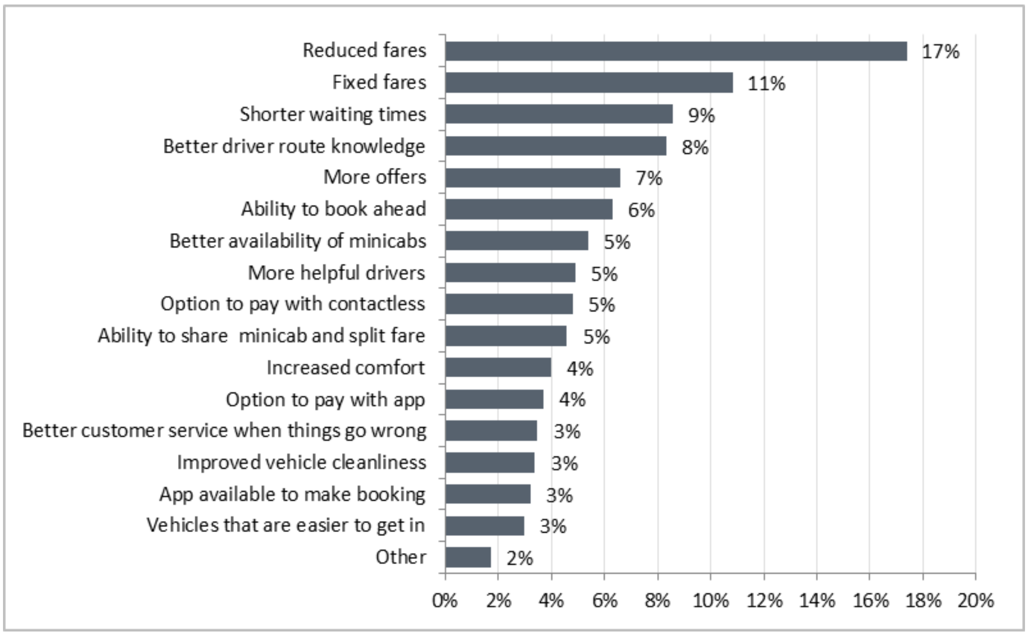


Sample: 889 respondents

Please note, respondents were allowed to select more than one response.

4.16 17% of respondents suggested that a reduction in fares would make them more likely to use minicab services, with 1 in 10 also selecting fixed fares. 1 in 12 stated that better driver route knowledge would also encourage them to be a more frequent user.

Figure 4.13: Thinking about how often you use minicabs, select up to 3 options that would make you use them more often?



Sample: 889 respondents

Please note, respondents were able to select up to three options.

5 App Usage

Introduction

5.1 This section looks specifically at respondents usage of black cab and minicab apps, which they use, how long they have using them and explores their perceived advantages.

Black Cab

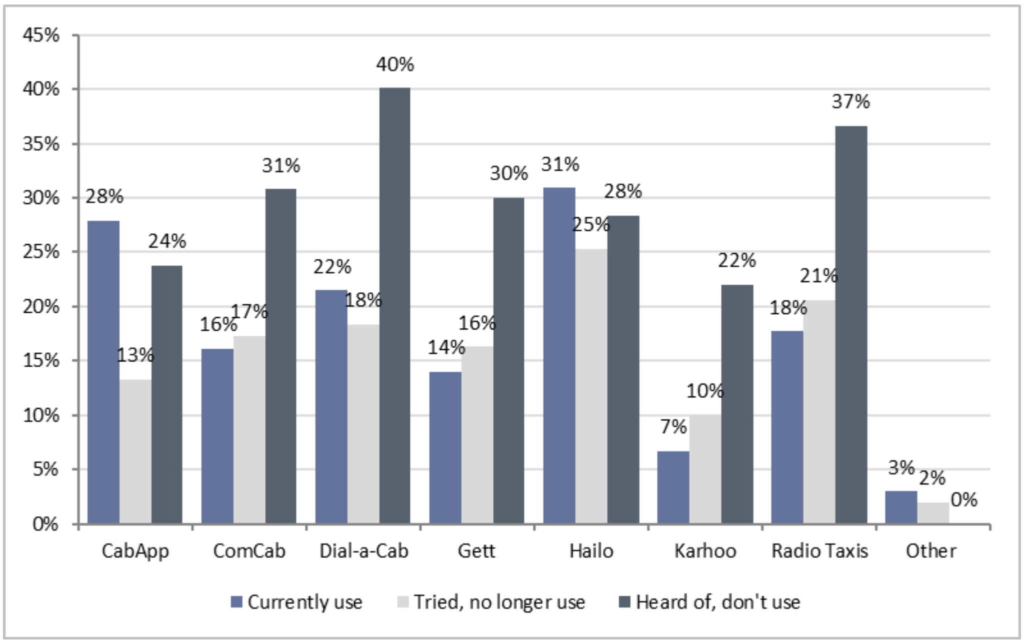
Black cab app usage

5.2 Whilst 68% of respondents are aware of mobile applications, only 20% use them to book black cabs. Just under a third of those surveyed were unaware that black cab apps existed (32%). Hailo was the most commonly used app of the options available (31%) and the second most popular app was CabApp (28%).

5.3 Users were also asked which black cab apps they had tried and no longer use. The selection of apps for respondents to choose from was the same as above. The most popular answer was Hailo (25%). The second most popular choice was Radio Taxis (21%) followed Dial-a-Cab (18%).

5.4 When black cab app users were asked which black cab apps they had heard of but didn't use, 40% of respondents answered Dial-a-Cab and 37% said Radio Taxis. 62% of users reported that they had not heard of Karhoo while 40% had not heard of Gett.

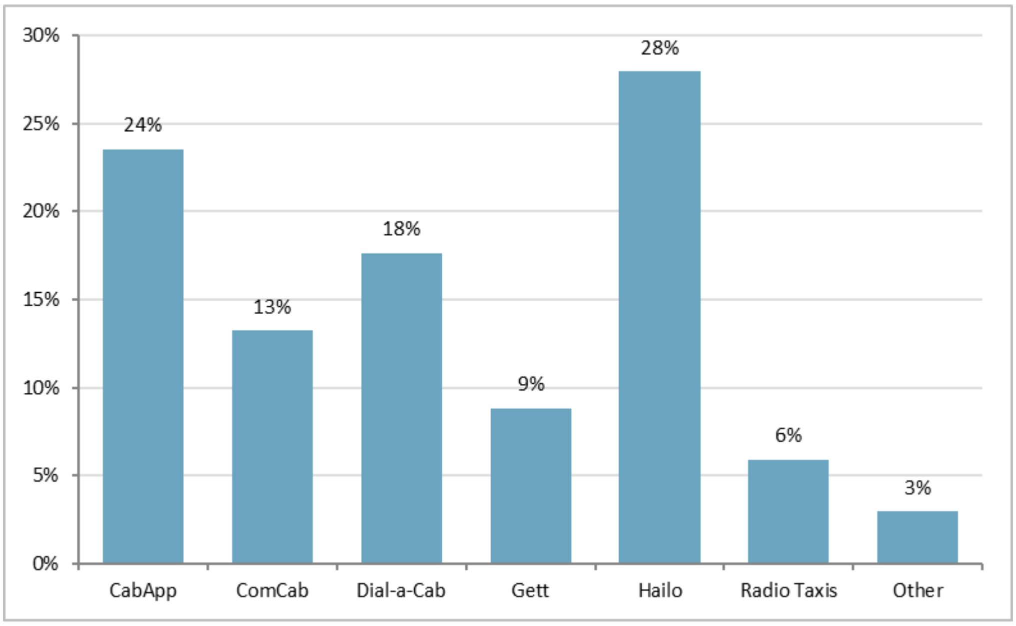
Figure 5.4: Which black cab apps have you heard of and which do you use?



Sample: 181 respondents

5.5 For users, the most preferred app out of all the black cab apps was Hailo[5] (28%). The second most popular was Cab App (24%).

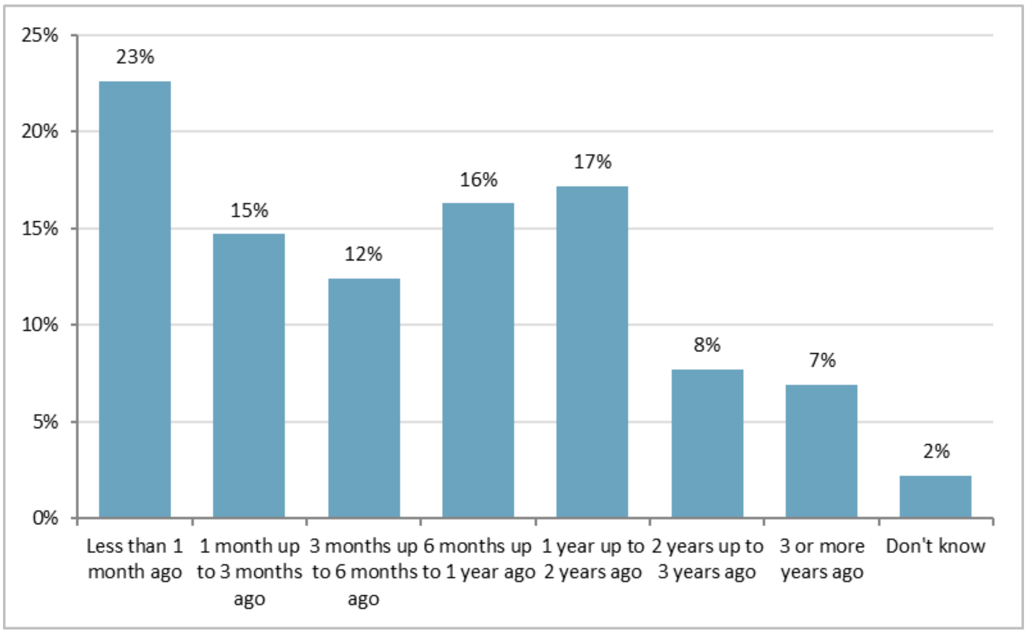
Figure 5.5: Which of these apps do you prefer to use?



Sample: 67 respondents

Most respondents were fairly new users of black cab apps with 66% having started using the booking apps within the last year. Only 15% of respondents had been using the apps for more than two years.

Figure 5.6: When did you first start using black cab booking apps?

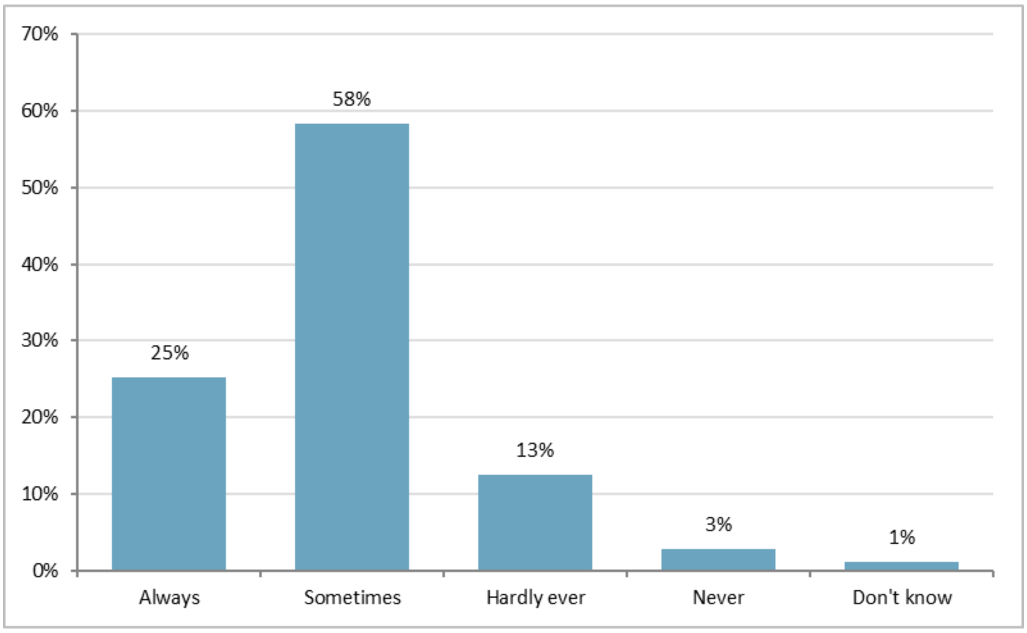


[5] Hailo has since merged with MyTaxi

Sample: 181 respondents

5.6 Four out of five users (82%) use apps to book black cabs with some regularity, answering either always (25%) or sometimes (58%). Only 3% of black cab app users said that they never used apps to book black cabs.

Figure 5.7: When you want a black cab, how often do you use a black cab app?

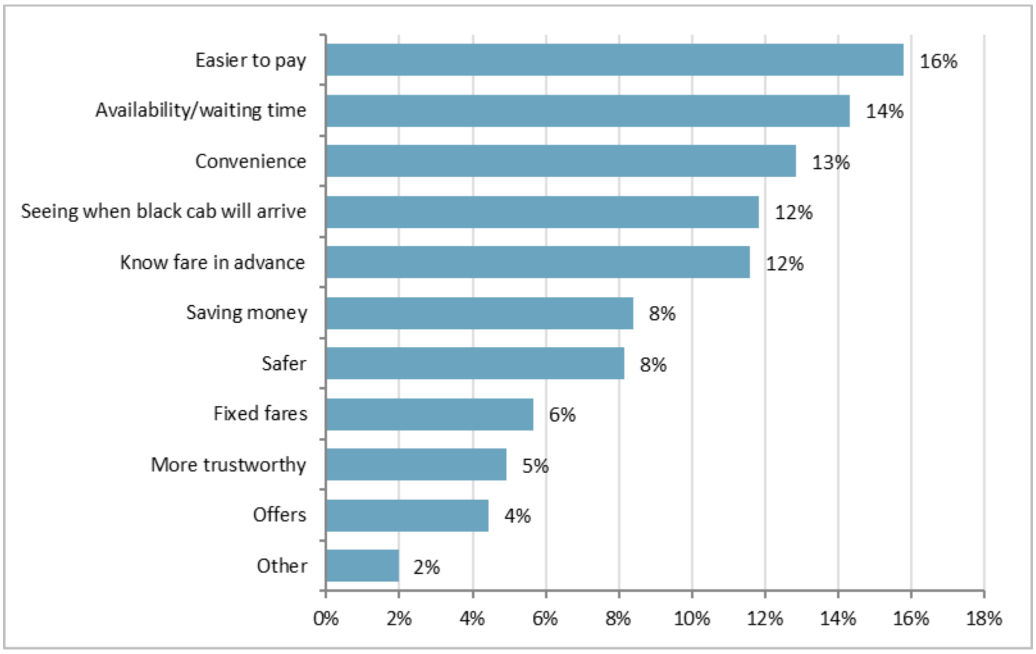


Sample: 181 respondents

Advantages of app use

5.7 Benefits related to convenience were the most common responses to this question with 16% answering that it was easier to pay, 14% citing the increased availability/reduced waiting times and 13% convenience more generally. Travel costs were also important to users, with 12% stating that knowing the fare in advance and 8% stating that saving money were benefits.

Figure 5.8: What do you see as the main benefits of using a black cab app?



Sample: 181 respondents

Minicab

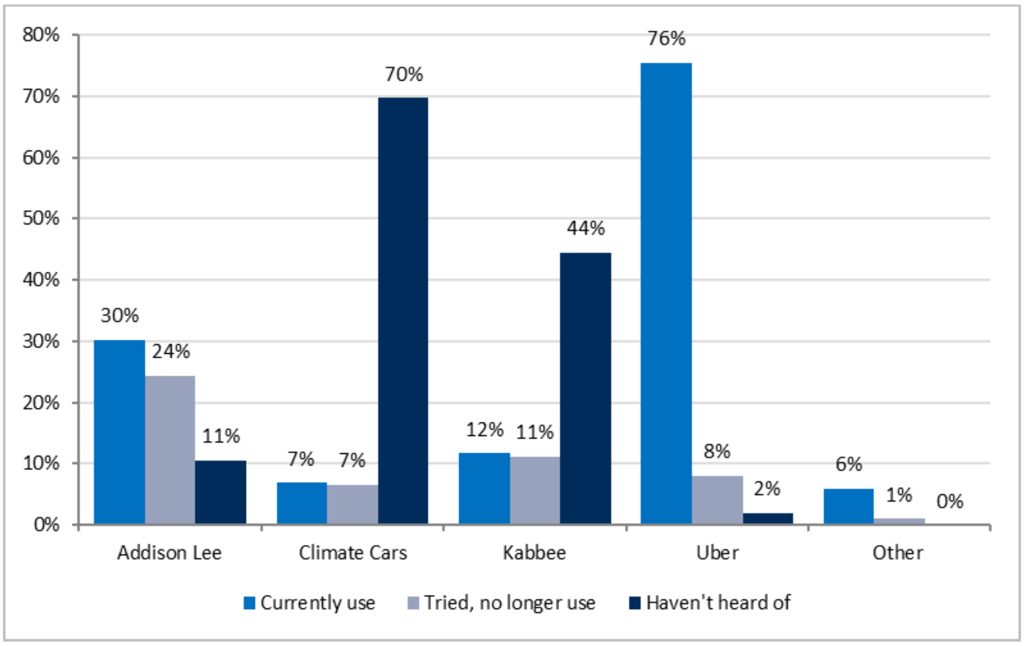
5.8 Over four fifths of minicab users are aware of mobile applications, but just over a third actually make use of them (36%). Just under a fifth of respondents were unaware of their existence (18%).

5.9 The minicab app users were most aware of, or used was Uber (91%). This was followed by Addison Lee (65% of respondents had used or were aware of the app).

5.10 Users were also asked which minicab apps they had tried and no longer use. The most frequently chosen app was Addison Lee (24%).

5.11 70% of users had not heard of Climate Cars while 62% had not heard of Karhoo.

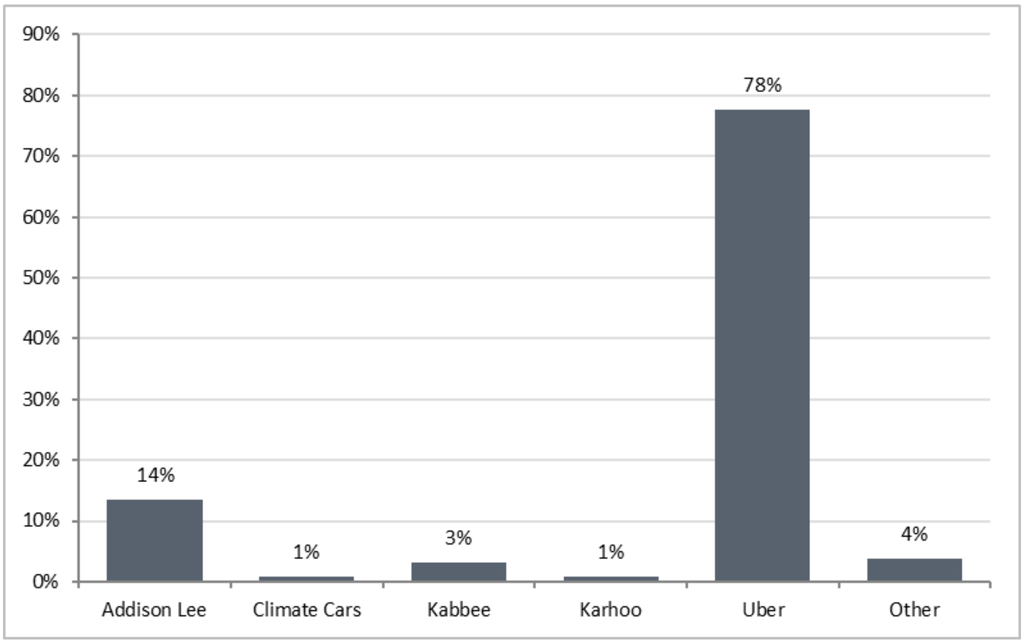
Figure 5.19: Which minicab apps have you heard of and which do you use?



Sample: 320 respondents

5.12 The most popular minicab app by a large margin is Uber (78%). The second most popular is Addison Lee (14%).

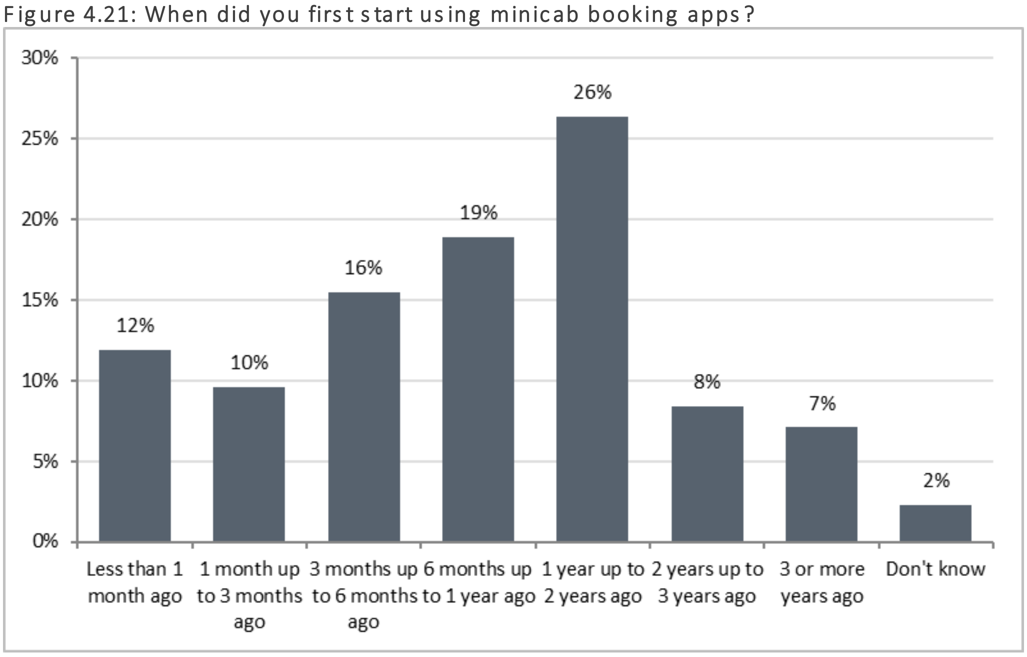
Figure 4.20: Which of these do you prefer to use?



Sample: 386 respondents

5.13 82% started using the booking apps within the past two years, with just over half of the respondents stating that they started using minicab apps within the past year (56%).

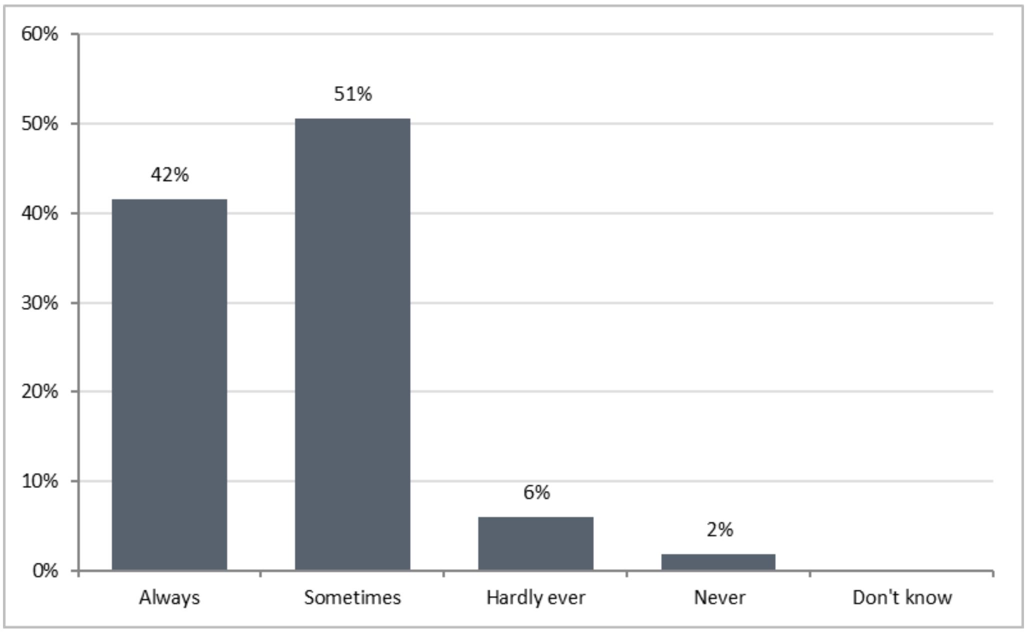
Figure 4.21: When did you first start using minicab booking apps?



Sample: 339 respondents

5.14 93% of respondents use apps to book minicabs with some regularity, answering either always (42%) or sometimes (51%). Only 2% of minicab app users said that they never used apps to book minicabs.

Figure 4.22: When you want a minicab, how often do you use a minicab app?

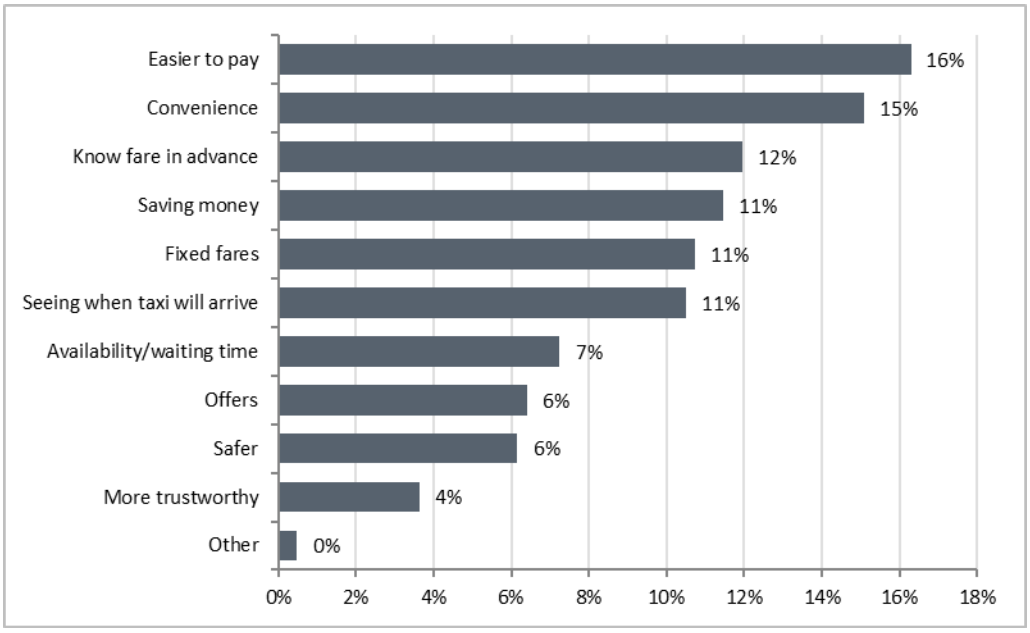


Sample: 339 respondents

Advantages of app use

5.15 For respondents increased convenience was the most cited benefit with 16% suggesting that it was easier to pay and 15% citing it was more convenient. The price of travel was also important to users with knowledge of the fare in advance being important for 12% of respondents and 11% citing both fixed fares and saving money as benefits.

Figure 4.23: What do you see as the main benefits of using a minicab app?



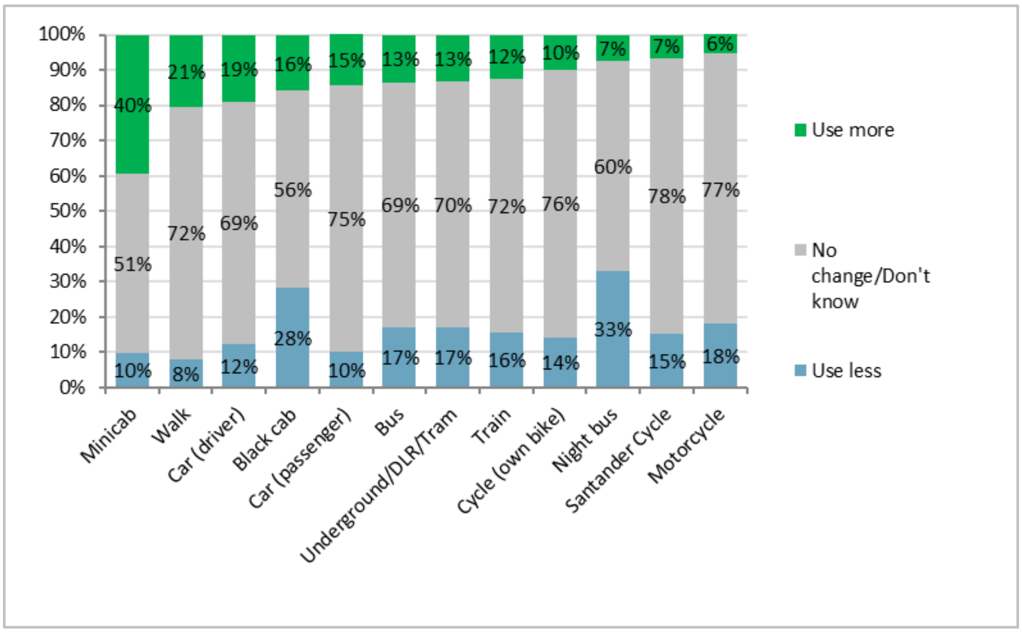
Sample: 339 respondents

6 Impacts on Travel Behaviour

6.1 This section considers the impact of black cab and minicab apps on respondents' general travel behaviours and whether they were aware of the existence of ridesharing options.

6.2 Since starting to use apps, 40% of respondents reported an increase in their use of minicabs and 16% reported an increase in their black cab use. However, 28% of users now use black cabs less than before. A third of respondents use night buses less after starting to use apps.

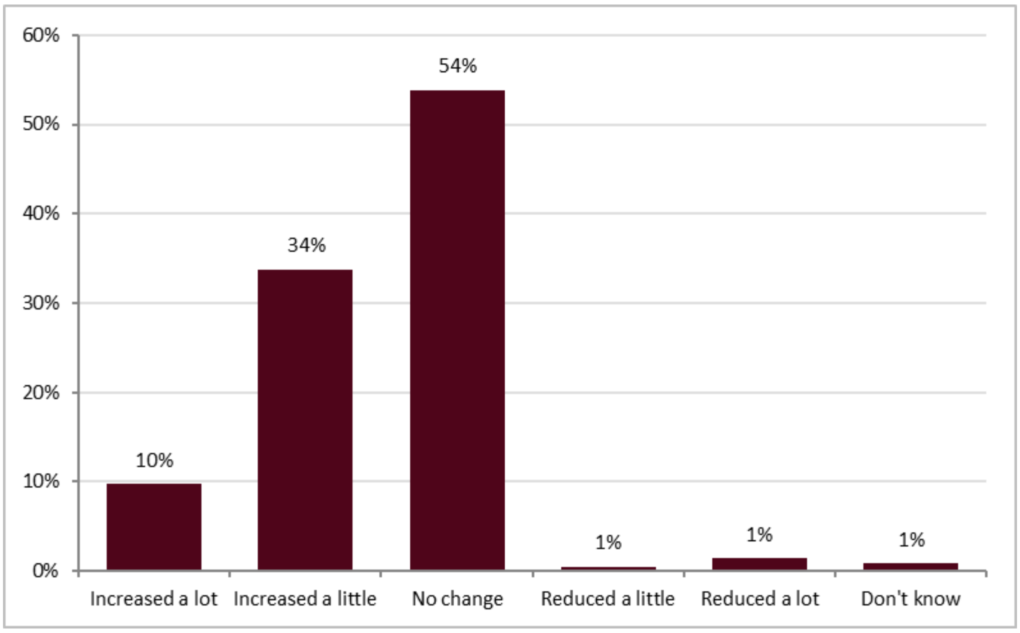
Figure 6.1: Since you started using apps, how have you changed your use of the following modes of transport?



Sample: 361 respondents

6.3 44% of respondents reported that app use had meant that they increased the number of trips they take for leisure or entertainment purposes (answering either increased a lot or increased a little). 54% reported that app use had no impact on the number of leisure or entertainment trips they took while only 2% reported that app use had reduced these trips.

Figure 6.2: Has your use of apps affected the overall number of trips for leisure or entertainment purposes you make in London?

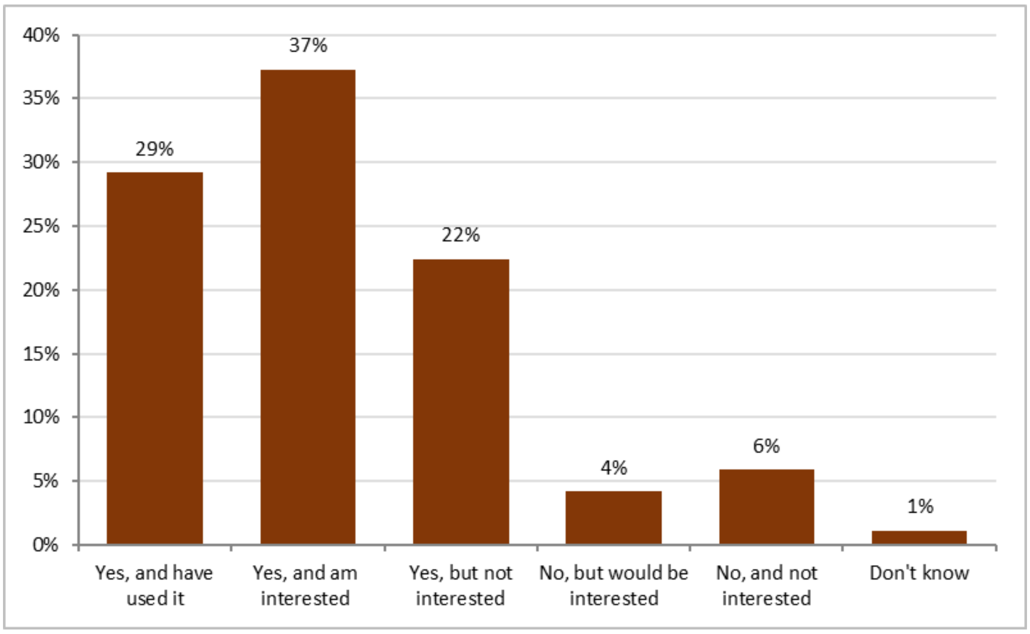


Sample: 361 respondents

Taxi & Minicab Ridesharing

6.4 89% of respondents said that they had heard of ridesharing and 71% said that they had either used it or would be interested in using it. Just over a quarter (28%) of respondents said that they were not interested in ridesharing.

Figure 6.3: Are you aware of ridesharing with people you don't know?



Sample: 166 respondents

7 App Satisfaction

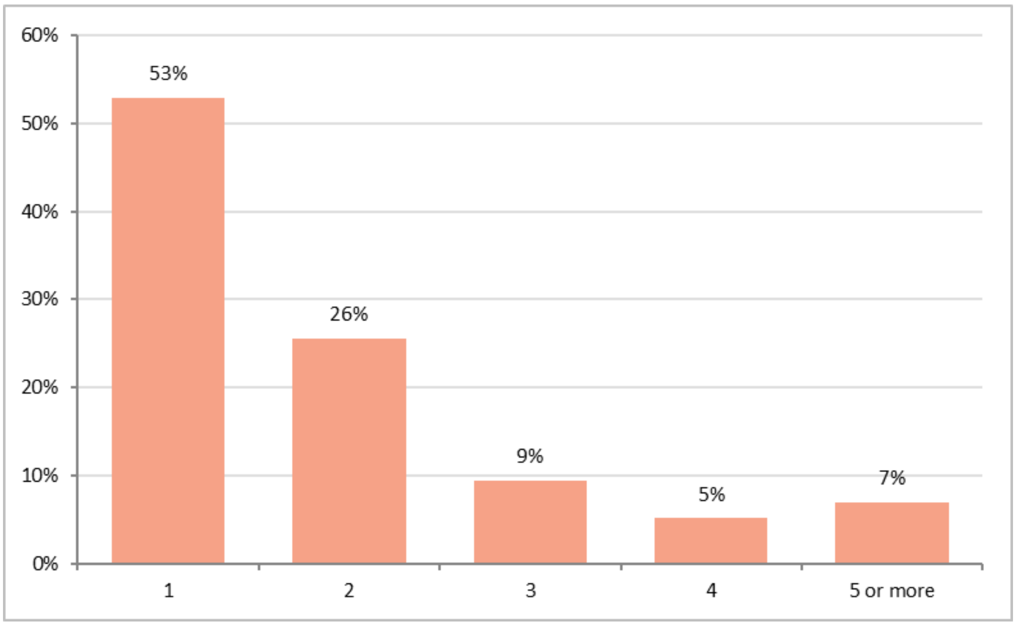
Introduction

7.1 This chapter looks at satisfaction to explore if respondents had more than one app installed and also if they have ever had any problems, how did they go about resolving them.

Number of Apps

7.2 Just over half of respondents (53%) stated that they had a single black cab or minicab app installed on their device, a quarter (26%) having two installed just over a fifth (21%) installing at least 3 different apps.

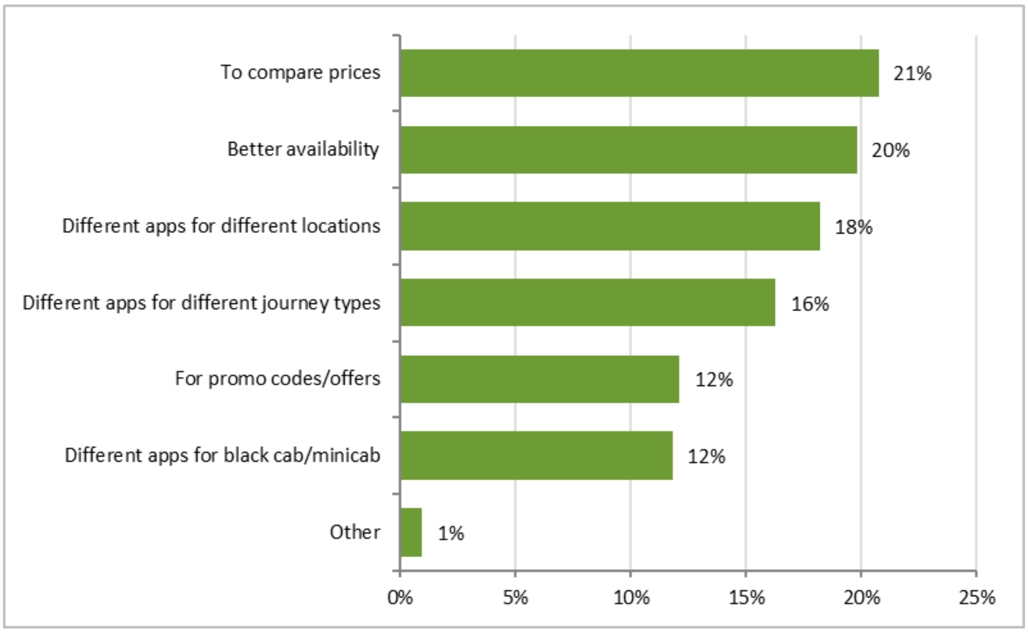
Figure 7.1: How many apps do you use?



Sample: 373 respondents

7.3 For respondents, comparing prices was the main reason for using more than one app (21%), closely followed by providing better vehicle availability (20%). Different apps for different locations and journey types were the next most common responses (18% and 16% respectively).

Figure 7.2: What are the main reasons you use more than one app?



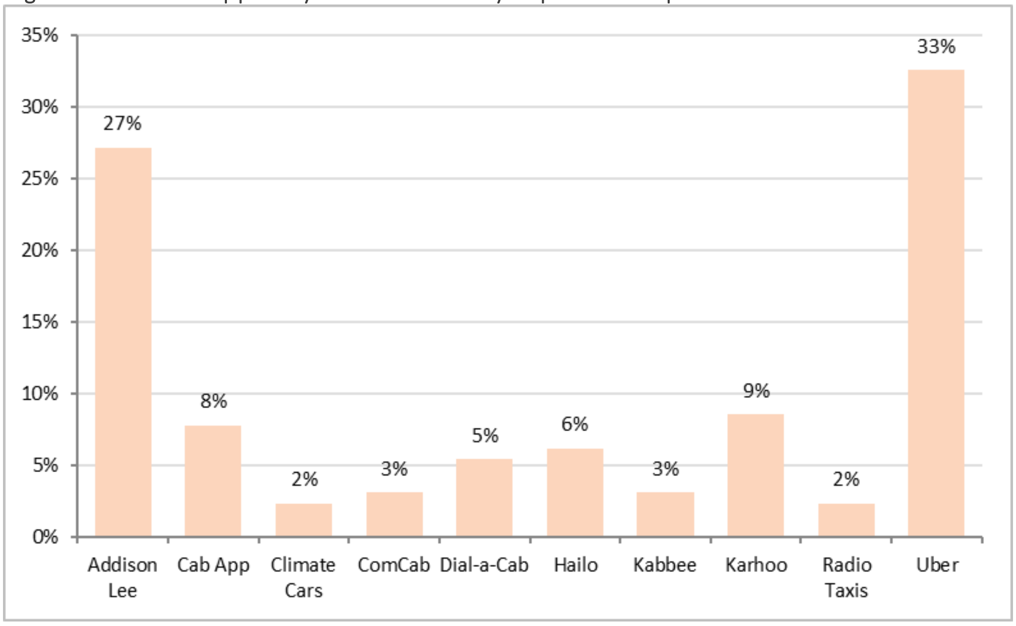
Sample: 166 respondents

Please note that respondents were able to select more than one option

Issues and Complaints

7.4 The app that the greatest number of respondents had experienced an issue with was Uber (33%) which was closely followed by Addison Lee (27%). All other apps had far fewer problems than this. It should be noted that Uber is used by considerably more users than other minicab apps and therefore is likely to have a greater proportion of issues.

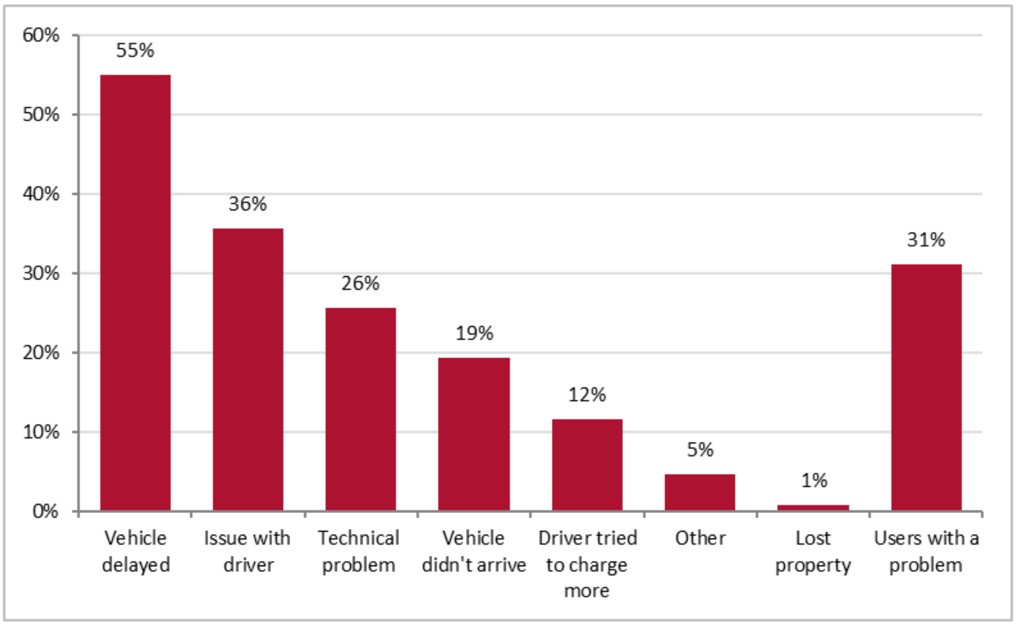
Figure 7.3: Which app did you most recently experience a problem with?



Sample: 114 respondents

7.5 The most common issue arising from app use was the vehicle being delayed (36%). The next most common problem was having an issue with the driver (23%) followed by a technical problem (17%).

Figure 7.4: What was the nature of your most recent problem?

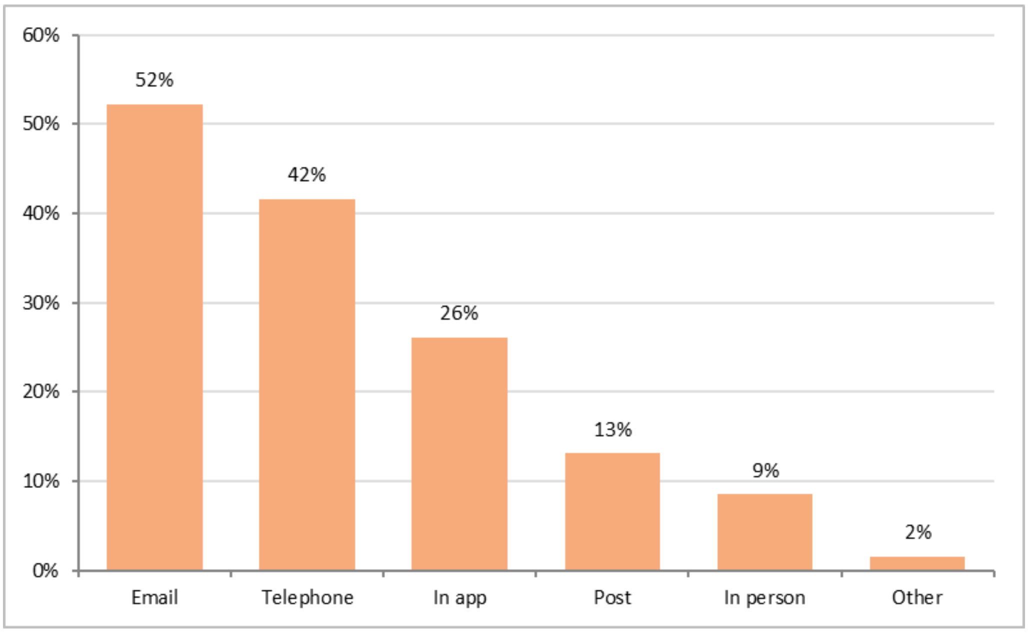


Sample: 170 respondents

Issue resolution

7.6 Of those respondents who had had issue with their chosen application, just over half (57%) had reported it to the provider. The most common methods of contact were email (52%) and telephone (42%).

Figure 7.5: How did you contact them?

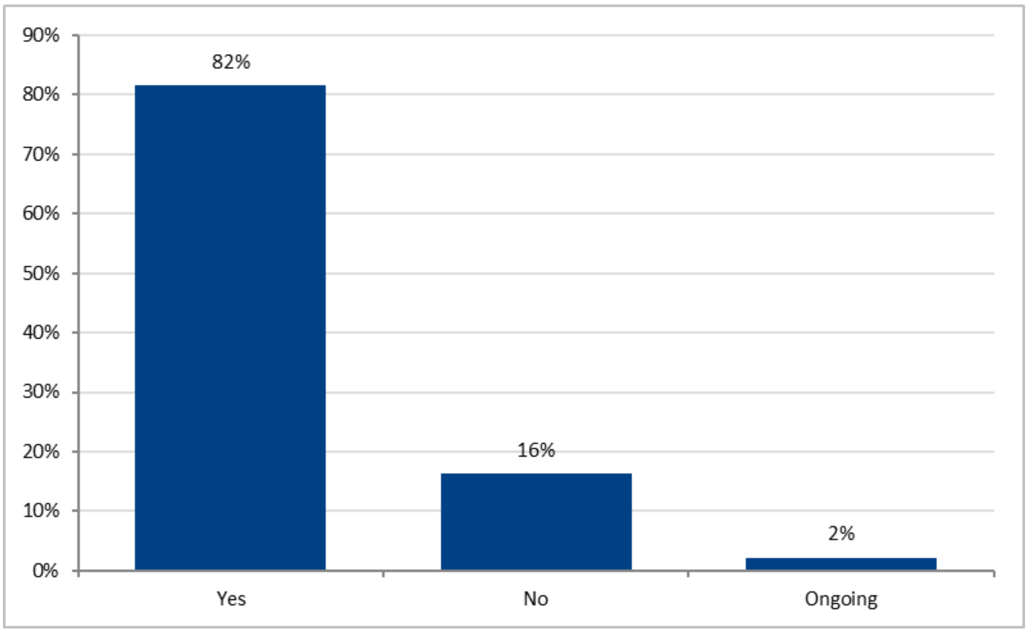


Sample: 56 respondents

More than one response was allowed for this question.

7.7 Of the 40 respondents who had contacted the provider about their problem, almost three quarters (73%) had requested a refund. The majority of those had ultimately received a refund (82%), however 16% did not.

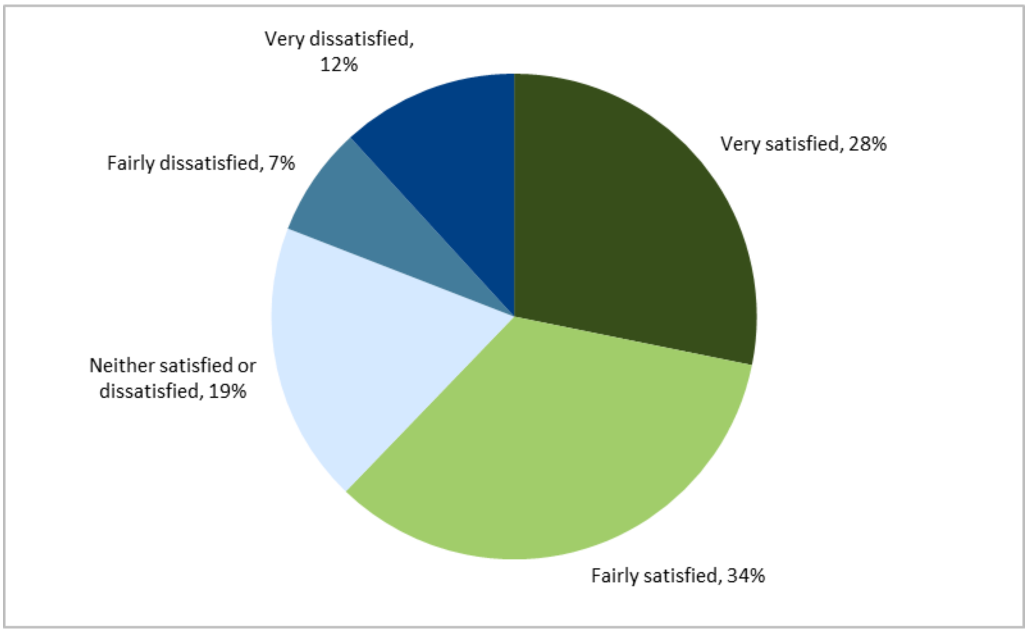
Figure 7.6: Did you receive your refund?



Sample: 40 respondents

7.8 62% of respondents were either very or fairly satisfied with the customer service they received, with 19% feeling fairly or very dissatisfied. However, despite the problems, the vast majority of respondents (86%) stated that they had continued to use the app despite the problems.

Figure 7.7: Overall how satisfied were/are you with the quality of customer service?



Sample: 56 respondents

8 Commentary

8.1 The purpose of this chapter is to consider the hypotheses proposed at the beginning of the report and look to see if the results either prove or disprove our understandings and assumptions from the focus groups that were undertaken in 2015.

"The use of apps increases the number of trips made by people, as well as re-distributing them between modes" and **"Apps can divert trips from many different modes"**

8.2 35% of app users have decreased the amount they use black cabs in the last 12 months compared to 11% who have increased their black cab use.

8.3 17% of app users have decreased their use of minicabs in the last 12 months compared to 19% who have increased their used of minicabs.

8.4 The survey specifically asked users whether they felt that black cab/minicab applications had had an impact on the number of leisure and entertainment trips that they made by those particular modes. Whilst the majority of respondents (54%) didn't feel that they had made any difference, 44% felt that it had increased (either a little or a lot).

8.5 Looking at all modes, there is evidence of redistribution of trips with 30% of respondents increasing their minicab use, 13% of respondents increasing the amount they walk, and 7% of respondents increasing the number of car journeys they make. Conversely, 26% of respondents reduced their night bus trips and 12% reduced their black cab use. There were much smaller changes on all other modes. The increase in minicab use could be due to the most commonly chosen reasons in the survey which were ease of paying (16%), convenience (14%) and knowing the fare in advance (13%).

"Customer loyalty towards apps is high and some hiccups are tolerated as long as customer service remains good"

8.6 This certainly appeared to be the case, as those respondents who had had issues with their chosen application, 86% had continued using the app. It's also interesting to note that of those who had complained, 82% had received a partial or full refund. This might well be affected by whether they felt their complaint had been handled professionally, with almost two-thirds of those who responded to that section of the survey stating that they were either fairly or very satisfied with the customer service they received.

"Loyalty to an individual app is less secure and some users have multiple apps on their phone"

8.7 There was some evidence in support of this hypothesis from the survey data. 47% of those who responded suggested that they had at least two apps installed on their devices – 7% said that they have 5 or more. When asked why they had more than one installed, over a fifth said it was because they wanted to compare prices, whilst a further fifth suggested it was to improve the availability to travel when required. What was unclear from the research, was of the apps they had installed, how many did they use on a regular basis i.e. do they use one almost exclusively and have the others as a back-up.

"Over time, brand loyalty may become more of a factor so there are likely to be differences in behaviour depending on how long the individual has been using apps"

8.8 Respondents were asked how long they had been using applications for and the profiles for black cab and minicab are somewhat different for this question. For black cabs, 38% had started using apps within the last three month, compared to 22% of minicab app users. 43% of minicab app users have been using them for a least a year, compared to just 34% of black cab app users.

8.9 There was little evidence to suggest that this particular hypothesis is correct. Uber is the most dominant player in the market, even though Hailo and Gett were both around sometime before[6].

8.10 It seems more likely that people are attracted to a particular provider because of the service and pricing offered rather than brand loyalty. Respondents were asked about what they felt were the main advantages of applications and for both markets, the most popular themes were convenience and matters related to payment (easier to pay, knowing fare in advance etc.).

8.11 When respondents were asked why they had multiple applications installed, 12% said it was because of promotions and offer codes – some evidence that perhaps loyalty or at least trying a different service can be bought.

"Uber (possibly, but not necessarily) and other apps are, in effect, becoming a new category of black cab/minicab"

8.12 The results from this survey neither proves nor disproves this particular hypothesis, but more anecdotal evidence might suggest this is becoming the case, with "Uber" in particular becoming part of the vernacular in its own right.

[6] Uber launched in London in 2012, while Hailo and Gett (formerly GetTaxi) both launched in 2011.

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APPENDIX A Description of Mosaic Groups

Mosaic UK
Group overview

A City Prosperity	A01	World-Class Wealth	Global high flyers and families of privilege living luxurious lifestyles in London's most exclusive boroughs
	A02	Uptown Elite	High status households owning elegant homes in accessible inner suburbs where they enjoy city life in comfort
	A03	Penthouse Chic	City suits renting premium-priced flats in prestige central locations where they work hard and play hard
	A04	Metro High-Flyers	Ambitious 20 and 30-somethings renting expensive apartments in highly commutable areas of major cities
B Prestige Positions	B05	Premium Fortunes	Influential families with substantial income established in distinctive, expansive homes in wealthy enclaves
	B06	Diamond Days	Retired residents in sizeable homes whose finances are secured by significant assets and generous pensions
	B07	Alpha Families	High-achieving families living fast-track lives, advancing careers, finances and their school-age kids' development
	B08	Bank of Mum and Dad	Well-off families in upmarket suburban homes where grown-up children benefit from continued financial support
	B09	Empty-Nest Adventure	Mature couples in comfortable detached houses who have the means to enjoy their empty-nest status
C Country Living	C10	Wealthy Landowners	Prosperous owners of country houses including the rural upper class, successful farmers and second-home owners
	C11	Rural Vogue	Country-loving families pursuing a rural idyll in comfortable village homes while commuting some distance to work
	C12	Scattered Homesteads	Older households appreciating rural calm in stand-alone houses within agricultural landscapes
	C13	Village Retirement	Retirees enjoying pleasant village locations with amenities to service their social and practical needs
D Rural Reality	D14	Satellite Settlers	Mature households living in expanding developments around larger villages with good transport links
	D15	Local Focus	Rural families in affordable village homes who are reliant on the local economy for jobs
	D16	Outlying Seniors	Pensioners living in inexpensive housing in out of the way locations
	D17	Far-Flung Outposts	Inter-dependent households living in the most remote communities with long travel times to larger towns

E Senior Security	E18	Legacy Elders	Time-honoured elders now mostly living alone in comfortable suburban homes on final salary pensions
	E19	Bungalow Haven	Peace-seeking seniors appreciating the calm of bungalow estates designed for the elderly
	E20	Classic Grandparents	Lifelong couples in standard suburban homes enjoying retirement through grandchildren and gardening
	E21	Solo Retirees	Senior singles whose reduced incomes are satisfactory in their affordable but pleasant owned homes
F Suburban Stability	F22	Boomerang Boarders	Long-term couples with mid-range incomes whose adult children have returned to the shelter of the family home
	F23	Family Ties	Active families with teens and adult children whose prolonged support is eating up household resources
	F24	Fledgling Free	Pre-retirement couples with respectable incomes enjoying greater space and spare cash since children left home
	F25	Dependable Me	Single mature owners settled in traditional suburban semis working in intermediate occupations
G Domestic Success	G26	Cafés and Catchments	Affluent families with growing children living in upmarket housing in city environs
	G27	Thriving Independence	Well-qualified older singles with incomes from successful professional careers in good quality housing
	G28	Modern Parents	Busy couples in modern detached homes juggling the demands of school-age children and careers
	G29	Mid-Career Convention	Professional families with children in traditional mid-range suburbs where neighbours are often older
H Aspiring Homemakers	H30	Primary Ambitions	Forward-thinking younger families who sought affordable homes in good suburbs which they may now be out-growing
	H31	Affordable Fringe	Settled families with children owning modest, 3-bed semis in areas where there's more house for less money
	H32	First-rung Futures	Pre-family newcomers who have bought value homes with space to grow in affordable but pleasant areas
	H33	Contemporary Starts	Fashion-conscious young singles and partners setting up home in developments attractive to their peers
	H34	New Foundations	Occupants of brand new homes who are often younger singles or couples with children
	H35	Flying Solo	Bright young singles on starter salaries choosing to rent homes in family suburbs

I Family Basics	I36	Solid Economy	Stable families with children renting better quality homes from social landlords
	I37	Budget Generations	Families supporting both adult and younger children where expenditure can exceed income
	I38	Childcare Squeeze	Younger families with children who own a budget home and are striving to cover all expenses
	I39	Families with Needs	Families with many children living in areas of high deprivation and who need support
J Transient Renters	J40	Make Do & Move On	Yet to settle younger singles and couples making interim homes in low cost properties
	J41	Disconnected Youth	Young people endeavouring to gain employment footholds while renting cheap flats and terraces
	J42	Midlife Stopgap	Maturing singles in employment who are renting short-term affordable homes
	J43	Renting a Room	Transient renters of low cost accommodation often within subdivided older properties
K Municipal Challenge	K44	Inner City Stalwarts	Long-term renters of inner city social flats who have witnessed many changes
	K45	Crowded Kaleidoscope	Multi-cultural households with children renting social flats in over-crowded conditions
	K46	High Rise Residents	Renters of social flats in high rise blocks where levels of need are significant
	K47	Streetwise Singles	Hard-pressed singles in low cost social flats searching for opportunities
	K48	Low Income Workers	Older social renters settled in low value homes in communities where employment is harder to find
L Vintage Value	L49	Dependent Greys	Ageing social renters with high levels of need in centrally located developments of small units
	L50	Pocket Pensions	Penny-wise elderly singles renting in developments of compact social homes
	L51	Aided Elderly	Supported elders in specialised accommodation including retirement homes and complexes of small homes
	L52	Estate Veterans	Longstanding elderly renters of social homes who have seen neighbours change to a mix of owners and renters
	L53	Seasoned Survivors	Deep-rooted single elderly owners of low value properties whose modest home equity provides some security

M Modest Traditions	M54	Down-to-Earth Owners	Ageing couples who have owned their inexpensive home for many years while working in routine jobs
	M55	Offspring Overspill	Lower income owners whose adult children are still striving to gain independence meaning space is limited
	M56	Self Supporters	Hard-working mature singles who own budget terraces manageable within their modest wage
N Urban Cohesion	N57	Community Elders	Established older households owning city homes in diverse neighbourhoods
	N58	Cultural Comfort	Thriving families with good incomes in multi-cultural urban communities
	N59	Asian Heritage	Large extended families in neighbourhoods with a strong South Asian tradition
	N60	Ageing Access	Older residents owning small inner suburban properties with good access to amenities
O Rental Hubs	O61	Career Builders	Motivated singles and couples in their 20s and 30s progressing in their field of work from commutable properties
	O62	Central Pulse	Entertainment-seeking youngsters renting city centre flats in vibrant locations close to jobs and night life
	O63	Flexible Workforce	Self-starting young renters ready to move to follow worthwhile incomes from service sector jobs
	O64	Bus-Route Renters	Singles renting affordable private flats away from central amenities and often on main roads
	O65	Learners & Earners	Inhabitants of the university fringe where students and older residents mix in cosmopolitan locations
	O66	Student Scene	Students living in high density accommodation close to universities and educational centres

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