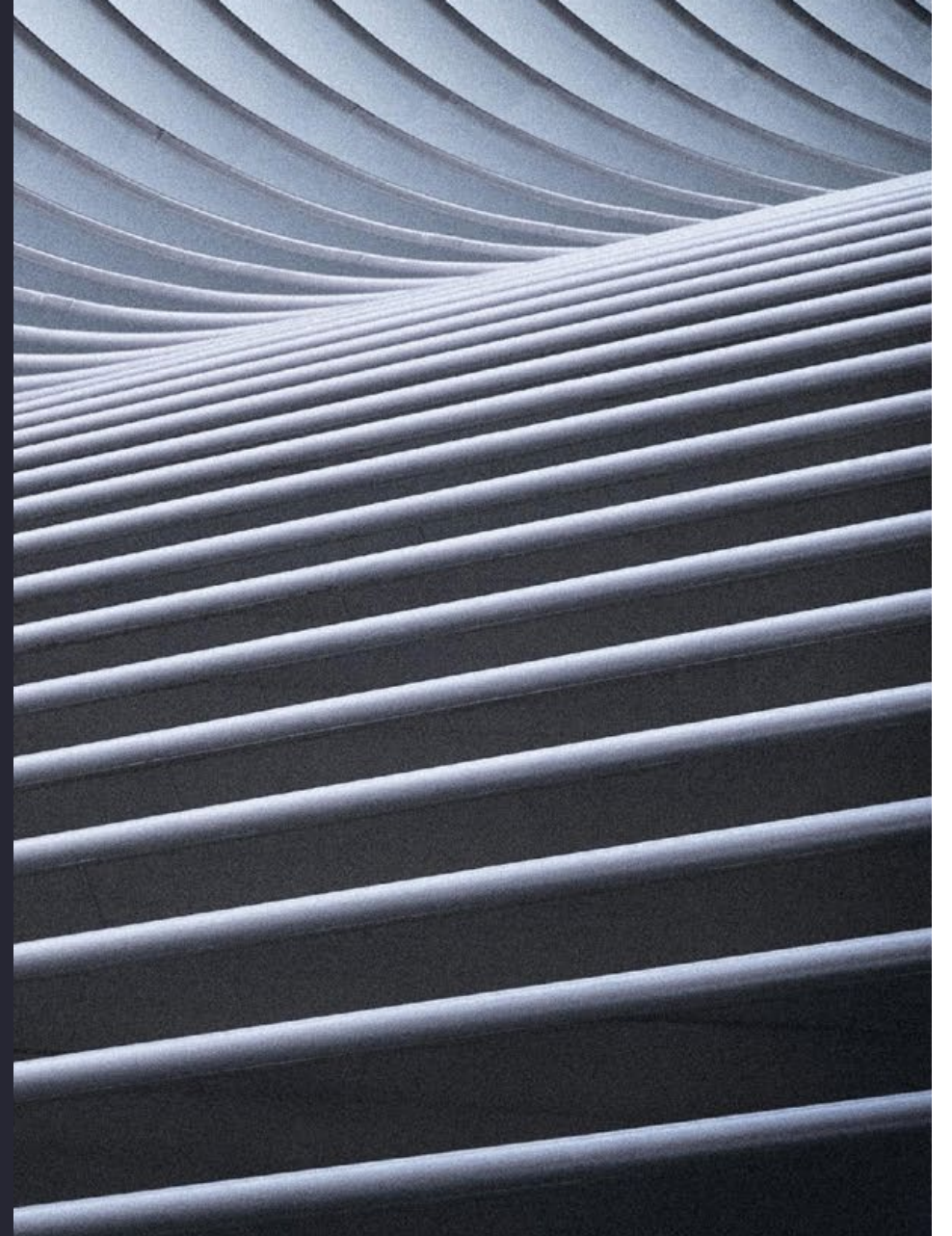


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Jersey Taxi Industry Research Presentation


Prepared for DVS
24.03.25





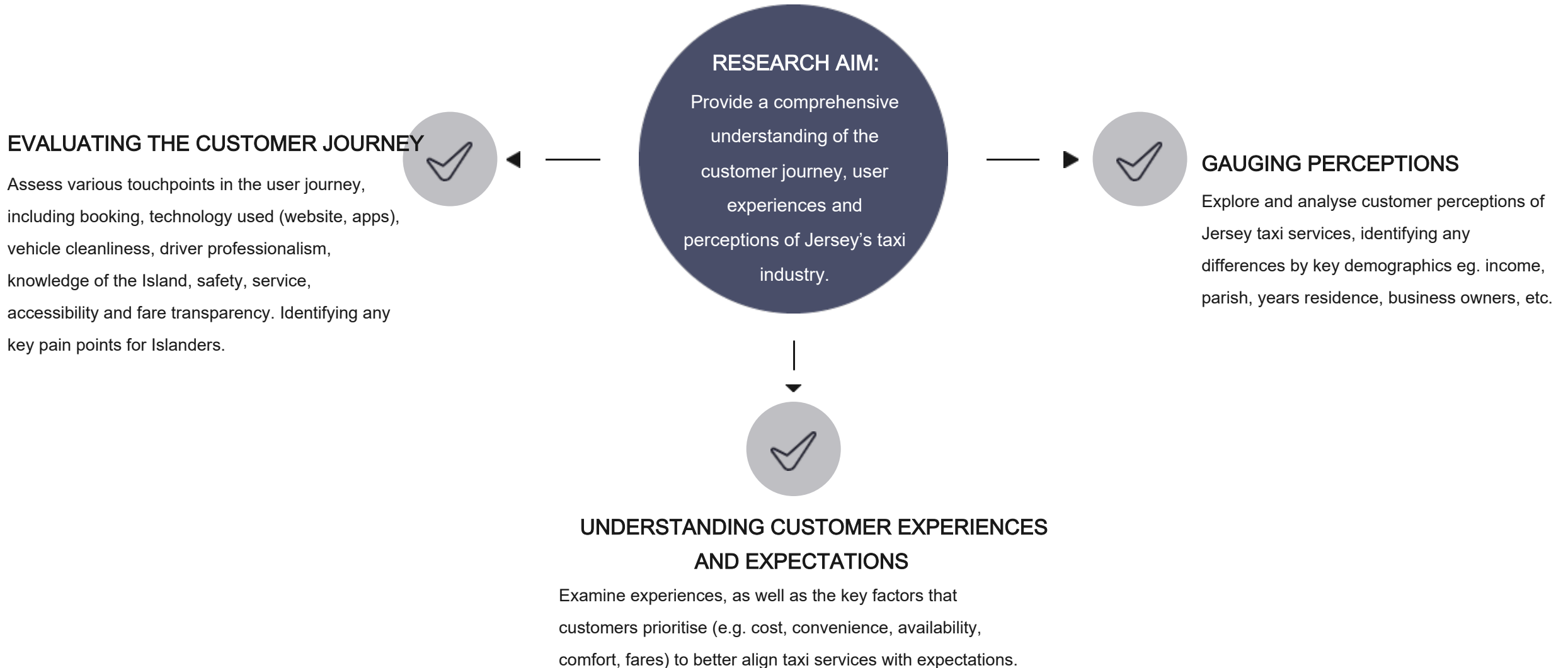
Agenda

1. Objectives
2. Sample & Methodology
3. Mystery Shopping dashboard
4. Qualitative Research findings
5. Executive Summary
6. Questions and discussion
7. Forward Plans



Research Aim and Objectives

Research Aim & Objectives



Scope, sample and methodology

Scope:

Consumers - a broad range of Islanders aged 17 and over who have used taxis for personal and/or business use.

Sample:

The respondents were contacted through 4insight's online panel of over 5,400 islanders, which is reasonably representative for Jersey. All focus group respondents were recruited and screened to a screener questionnaire, which ensured we included a good mix of social demographics and types/times/days of taxi use.

Mixed methodology:

1 - Mystery Shopping - direct observation and real time capture of individual customer taxi journeys, (30 taxi trips). Conducted from the 6th December to 22nd December 2024 covering various short, long, airport runs, times etc.

2- Qualitative research to ensure broader customer experiences covering BOTH rational and emotional perspectives by conducting **2 focus groups** on Thursday December 5th 2024.

Each group lasted about 90 mins and was conducted to an agreed discussion guide incorporating projective and enabling techniques to explore the emotional perceptions and dig deeper. All focus groups were held in our professional viewing facilities which allow live observation and listening plus the opportunity to ask any additional questions before the groups close.

3 - QR code online survey available for all taxi customers to use, providing real time results in dashboard. Set up live for early December 2024.



Mystery Shopping dashboard



Qualitative Research

The most frequent first word associated with “Taxis in Jersey” was ‘Expensive’ and sentiment was mostly negative

Q. Please write down the first words that come to mind when I say.....“Taxis in Jersey....”



Responses:

- *Expensive x 14*
- *Unreliable x3*
- *Not available x3*
- *Rude drivers x3*
- *Modernisation x3*
- *Inconsistent prices x2*

n=15

Sentiment:

Positive: 9%
Neutral: 10%
Negative: **78%**

Frequency and Reasons for Use:

- Most participants use **taxi occasionally** , with frequencies ranging from a few times a month to sporadic use throughout the year.
- Most commonly used for **pure convenience** : late-night social travel, to avoid drink-driving, airport trips (particularly for red-eye flights) and specific work-related trips.
- Travel by taxi **generally avoided** , most only do so if absolutely necessary.

"Few times a month, for airport runs mainly, particularly red-eye."

"When you're away for a couple of days, tends to be cheaper to get a taxi to the airport."

"Going from St Clements I'd have to get two buses. Plus I've got three young children and all the luggage."

"It really depends on when the bus is running. If it's not running when I need to go to the doctors, then I take a taxi."

"I think they are an expensive necessity to be honest, avoid them if I can."

Participant Experiences:

Positive Experiences:

- Some companies praised eg. Yellow Cabs for reliability and communication. Those who had used Ryde were particularly satisfied with app, live location tracking and transparency over fare, perceived to be less expensive for longer trips. Mixed experiences with Jersey Taxi App.
- Vehicles overall viewed as comfortable, clean, some experiences with courteous and professional drivers though this was seen to be 'hit and miss'.
- Participants generally all feel 'safe' in Jersey taxis, although there were some reports of speeding and questionable driving.

Negative Experiences:

- Confusion over large cost variations for similar length trips, similar times of day.
- Issues with driver professionalism, examples of rudeness, including inappropriate conversations.
- Issues with availability to busy locations during peak times (e.g. airport, Royal Jersey Showground after events etc.)
- Perceived lack of coordination at key rank locations, leading to long queues and uncertainty about availability.

"Once I found a reliable company, Yellow Cabs, I've never had them not turn up."

"Coming back from the airport, driver was just dressed scruffy. Driving between Beaumont and Bel Royal, he hit the pavement! I was coming out of the airport and jumping in."

"The usual experience, they turn up late, charge too much"

"Have heard stuff over radio, heard taxi driver talking about agents ex husband, don't really need that information!"

"The man was so nice. We had pre booked and he was £20 cheaper than the last one we had."

Q. Thinking about your taxi experiences in Jersey over the past few years please score based on the following: (on a scale of 1-10 with 1 being extremely dissatisfied and 10 being extremely satisfied):

Cost and Value for Money

3.6

Convenience and Availability

4

Comfort and Vehicle Quality

7.4

Driver Professionalism and Service

6.4

*Scores
ranged from
3-10

Overall Quality:

5.8

n=15

*mean scores

Cost:

- Taxis in Jersey perceived as **extremely expensive** , especially when contextualised against other regions with similar or more expensive perceived costs of living (eg. London).
- Having to factor in the high cost of a taxi journey is **discouraging young Islanders from going out and socialising** .
- Some fears that cost of taxis may increase incidence of drink-driving. Perceived to increase the use and prevalence of 'Jersey Lifts', with over 40,000 members.
- Lack of **transparency in fares** and experiences of significant cost differences with similar trips in the same tariff window. Calls for clarity or predictability of costs, perhaps fixed fares for the most common routes (eg. Airport to St. Helier).

"I'm on income support, I don't like being on income support, it will take probably a third of my income that week if I have to get a taxi."

"I'd say the price is significantly worse than anywhere I've ever been."

"Could get a return flight to London for some of the prices"

"How do you bring down cost levels, they have to earn a living?"

"You just feel resigned to the cost."

"Same trip a couple of weeks later cost me £20 less."

"Issue is for younger people, how do they get home late at night? No buses they have to get a taxi or a 'Jersey lift'. They don't have the money"

Availability and Reliability:

- Taxis are often **unavailable during peak times or for events** . Stories of calls to multiple operators and being told no taxis are available
- **Long queues** at Weighbridge taxi rank and uncertainty over how long it will take and whether taxis will actually arrive, particularly for late night socialising. Similar issues at the airport with stories of large queues and no taxis available. Perceived **lack of coordination** by taxi operators.
- Some participants thought availability issues may be negatively affected by an **aging driver pool** (semi-retired drivers with lower/less late night hours), with limited younger drivers and limited licences available

"The Showground when everyone books at the same time, everyone arrives at the same time, people get in other people's booked taxis if they're all at the same event."

"Yellow Cabs has been fine in the past for me"

"Queuing, often waiting for half an hour at least" (at Weighbridge)

"I've used Jersey lifts I don't feel great about it but at least they're available."

"Always hit and miss at airport, taxi companies should work together."

"There is a shortage of drivers a lot of them are older, semi retired or don't want to do late hours. Taxi driver dictates what they want to do, only so many licenses."

"I see more and more tourists using the bus at the airport"

Driver Conduct:

- Mixed experiences reported by participants, found to be very **'hit and miss'**.
- Some praised drivers for their punctuality and friendliness, while others reported unprofessional behavior, such as discussing personal topics including other customers over the radio, being on the phone while driving and speeding.
- Perception that the lack of ability for passengers to 'rate' drivers, like you can with other services creates accountability issues.
- Potential impact on Jersey's Image: Participants **view drivers as 'ambassadors' for Jersey** - to tourists, visiting business people etc. Frequent reports of rudeness, along with complaints and negativity about Jersey.

"One experience where the taxi driver was slagging off Jersey, really bad advert for Jersey"

"I've had a bit of that, drivers complaining about Jersey"

"Was stranded at The Showground, every taxi company said no, luckily one guy picked us up, he was very friendly and positive"

"They operate at 10 mph above the speed limit. they know full well that there's a sort of a threshold with regards to prosecution. They regard that as the new speed limit."

"I heard the taxi driver talking about agents ex husband. I don't really need that information!"

"Had one where they were on phone with the office, talking negatively about other customers."

"At my old job it became a bit of a recurring theme, you'd ask visiting colleagues how was your taxi from the airport? And they would tell you all sorts of bile about the island, about how bad the government is, how expensive things are. That's a lot of business people coming to the island. That's their first point of contact arriving here and it's not a good look."

Accessibility:

- Participants with children noted taxis **rarely have more than one car seat available** for families with young children. Blocker to larger families using taxis more frequently.
- Perceived **lack of wheelchair accessible taxis**. Participants mentioned hearing stories from friends and on social media.

"I have friends that have two disabled children and there's only a few taxis on the island that have the ability to hold them both."

"I'd be more likely to book a company if I knew - oh, they always have car seats available."

"On the Uber app you have that available, you can select number of car seats or even pick a family friendly car as well."

"I often see on Facebook that people can't get a wheelchair taxi over here very easily."

Technology Use

- Jersey taxis perceived to be years behind other regions. Clear **desire for modernisation** among participants. Especially when comparing Jersey's taxi services with Uber or Bolt.
- Ability to pay by card for most, if not all taxis was noted by participants and this was very much appreciated.
- The introduction of Ryde, is seen as a **positive step** by those who have used. App interface, upfront pricing, live location tracking, branding, rating system all viewed positively.
- **Skepticism** about the industry's willingness to modernise and embrace technology use. Some participants questioned whether meaningful innovation would happen if it hasn't happened by now.

"It's helpful when they send a text that your driver is en route, it is a comfort"
"They must have had that in London 15 years ago."

With Uber, you can see that the drivers are rated, you at least have an idea of who they are. Don't think taxis have anything like that here?"

"If they've not done it by now, will it ever be done? must be a reason why they've not incorporated it."


"You're stuck with ranks everywhere or telephoning, people just want to click and get picked up."

"I mean, Ryde knows where you are and it says, do you want to go home? It's got your location now, So if we go out for a meal, I'm not having to try and queue, not knowing how long it will be. You can just get another drink and you know it' will be there."



Self-Completion exercise

Most
mentions



Cost was seen as the 'biggest issue' in the first sentence completion exercise

"The biggest issue with taxis in Jersey is"

Cost (x8)

Cost and other issues (eg.
availability, reliability,
attitude) (x5)

Driver attitude and behaviour
(x3)

Availability (x1)

"Cost is insane"

"Cost and attitude of drivers"

"Cost, long waits, taxi driver quality/behaviour."

"They are way too expensive, a luxury product, needs to be some kind of incentive to use them"

"The biggest issue with taxis in Jersey is"


"Cost, attitude of entitled drivers, reliability."

"The cost of short rides"

"Too expensive"

"It is too expensive, not always available at airport if you haven't pre booked."

Most
mentions



Key improvement needed lowering the cost, followed by adopting technology

"The key improvement needed for Jersey taxis is"

Lowering the cost (x10)

Adopt technology (x4)

Availability (x2)

Fixed fares for
journeys (x2)

Accessibility (x2)

Professionalism of drivers (x1)

"Lower cost and make more accessible"

"Improve ability to show prices, if people can see the prices before they book they can go back to using taxis again"

"Competition, more technology-based."

"Help from the Government to lower taxi prices and allow more drivers/innovation in taxi firms."

"The key improvement needed for Jersey taxis is"

"Modernise, follow the Uber model"

"Lower fares, set fee to and from airport at different times."

"Make them cheaper, accessible."

"Regulate cost and professionalism of drivers"

"Ensure taxis are available at peak times, revised costs."



Executive Summary

Key Challenges

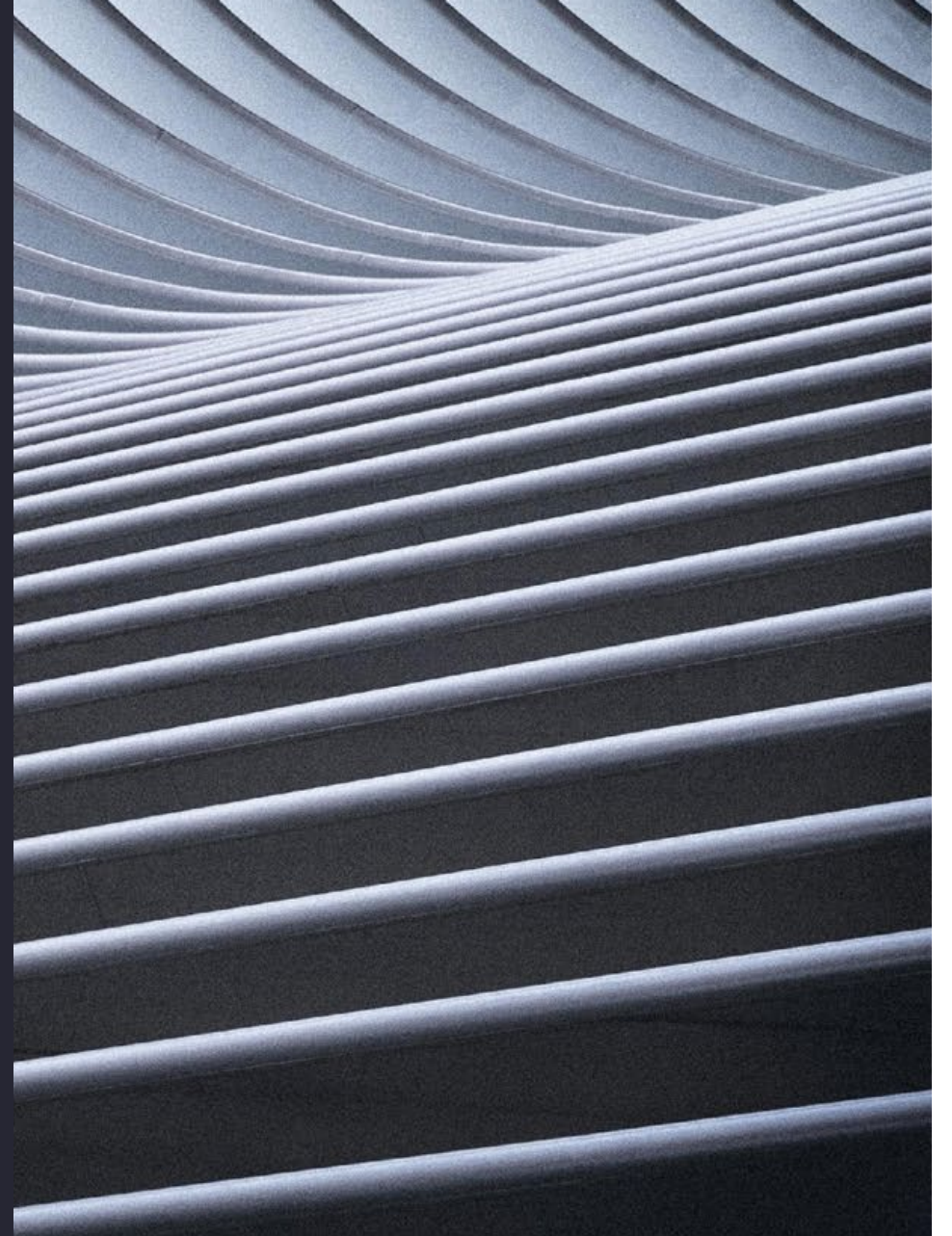
1. **Cost Concerns:** perceived as extremely expensive, especially compared to other regions. Limited in upfront, transparent pricing.
2. **Availability issues:** perceived lack of availability, especially at peak times when participants actually want to book a taxi. Long queues at Weighbridge Place, lack of availability and coordination at airport.
3. **Driver conduct:** mixed experiences with professionalism. Inconsistent service quality. Examples of inappropriate conversations and negativity about Jersey, viewed by some as poor ambassadors for the Island to tourists and visitors. Lack of rating system/accountability for drivers perceived to contribute to this.
4. **Technology and Modernisation Gap:** Perception that Jersey's taxi services lag far behind other regions, some skepticism around the industry's willingness to embrace innovation.

Opportunities

1. **Decrease cost burden and improve transparency:** Consider not increasing starting fees/fees per mile for journeys, introduce requirements for clarity over costs upfront or 'pre-journey', introduce fixed fares for common routes eg. airport to town or parish.
2. **Enhance availability:** Introduce coordination systems at key rank locations at peak times, particularly Weighbridge Place and airport. Incentivise wheelchair accessible vehicles and multiple child seats.
3. **Consistent customer service:** Consider standardised training for drivers to ensure courteous, professional behaviour, encouraging 'ambassadors' for Jersey. Introduce restrictions on radio use/discussions and tighter checks on speeding - requirements for GPS speed trackers, in-vehicle speed limiters.
4. **Embrace technology and modernisation:** Champion and create incentives for app-based booking and tracking systems like Ryde introduce a rating system for drivers to improve accountability.
5. **Leverage positive experiences:** Build on praise received for companies, features, services and drivers to create a new benchmark for the entire industry.

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**ANY QUESTIONS &
DISCUSSION**



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Forward Plans?

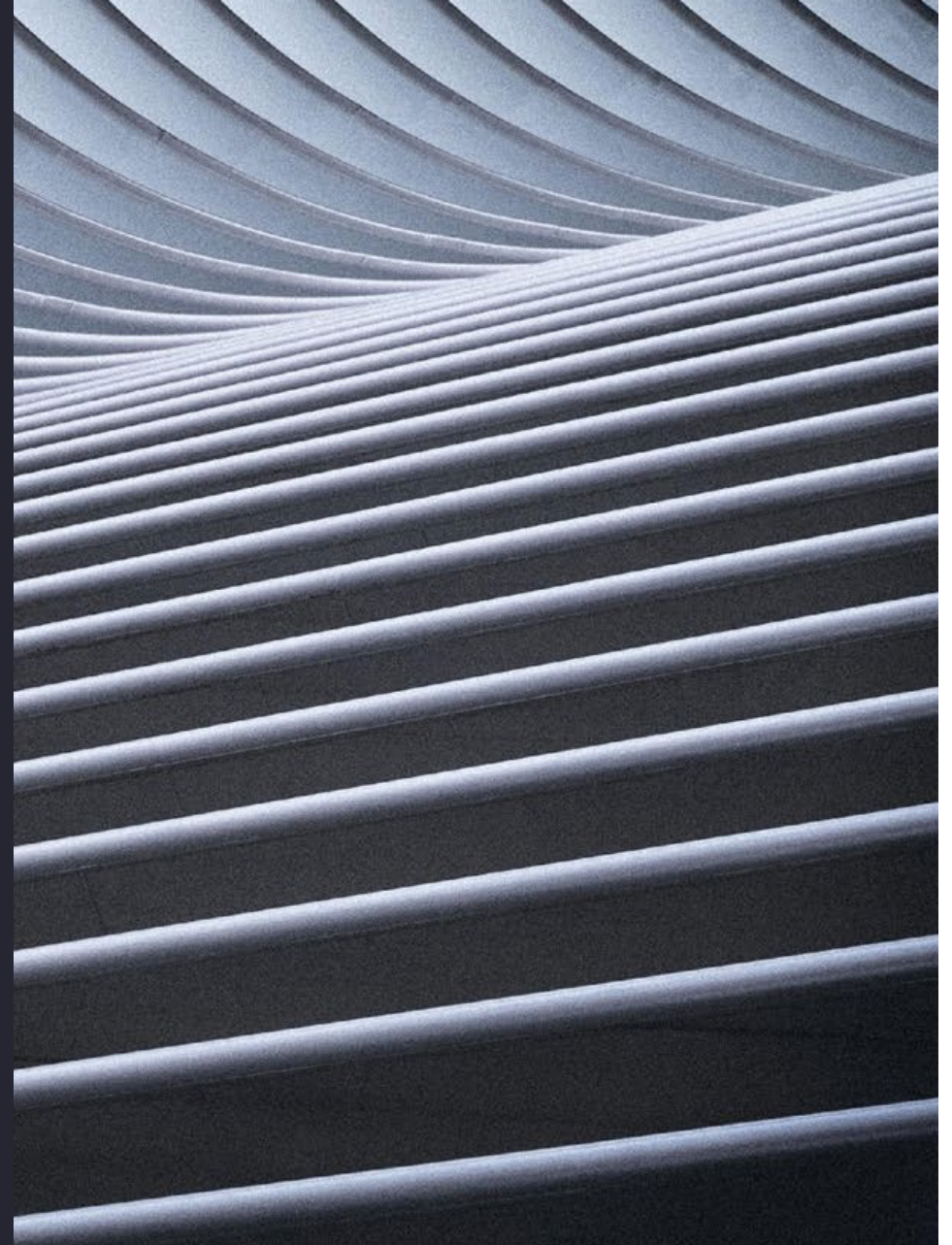
QR coded survey

Any repeats later 2025?:

Mystery Shopping

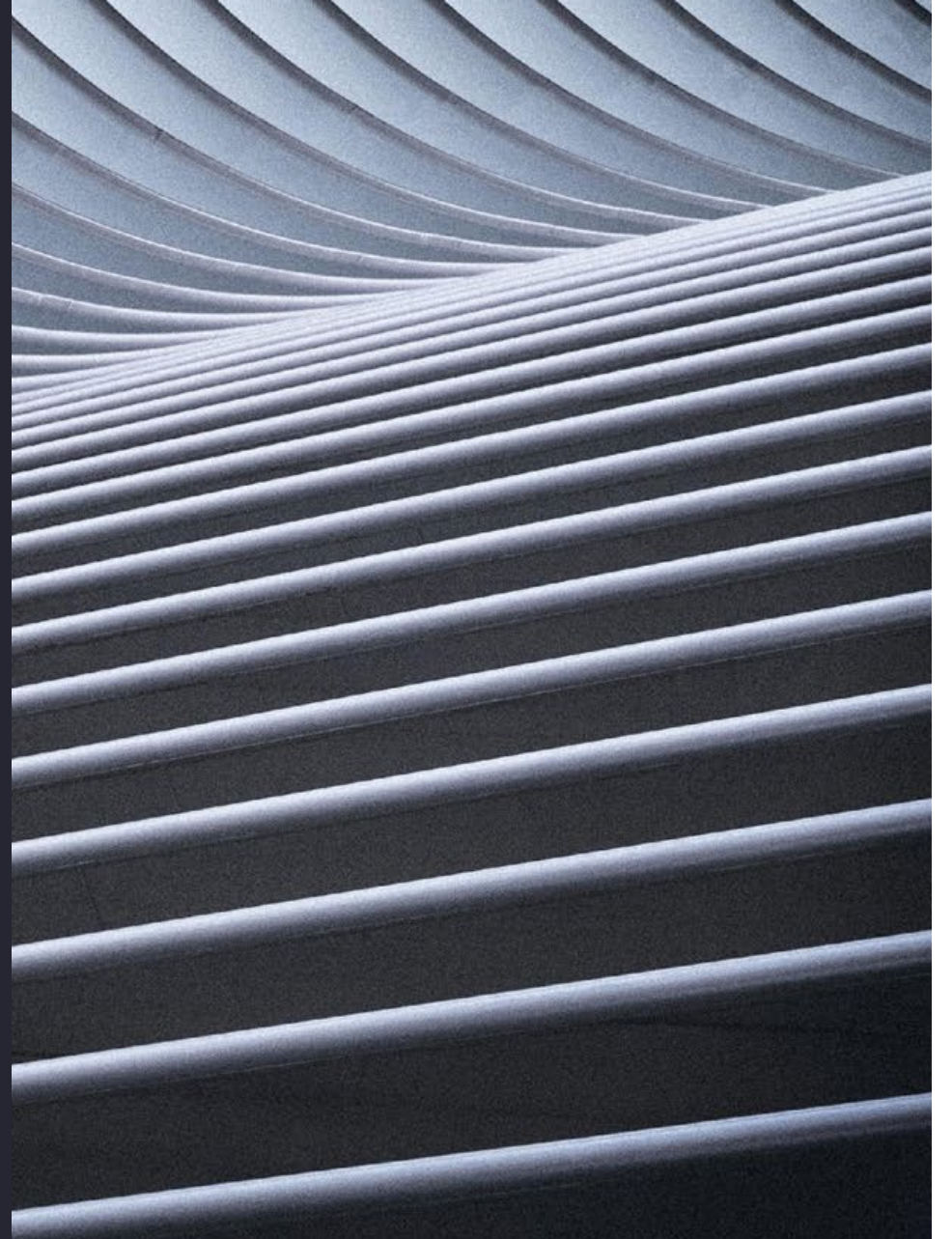
Focus Groups

Customer Service training,
free in April or bespoke



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Appendix

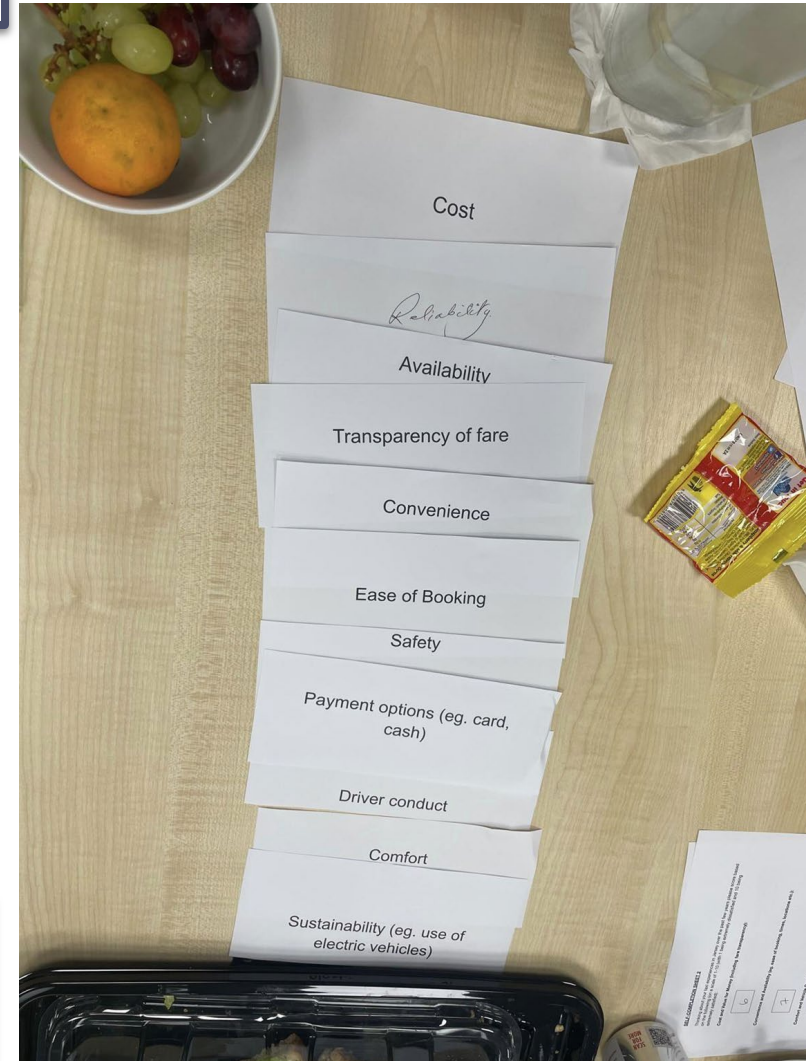


Group 1 ranking - cost most important, unanimous

Q. When you think about an ideal taxi experience, what factors are most important to you?

"Cost has got to be up there" (agreement)

"I'd put sustainability last" (agreement)



"I'd say these should be in the middle tier- transparency, convenience, ease of booking"

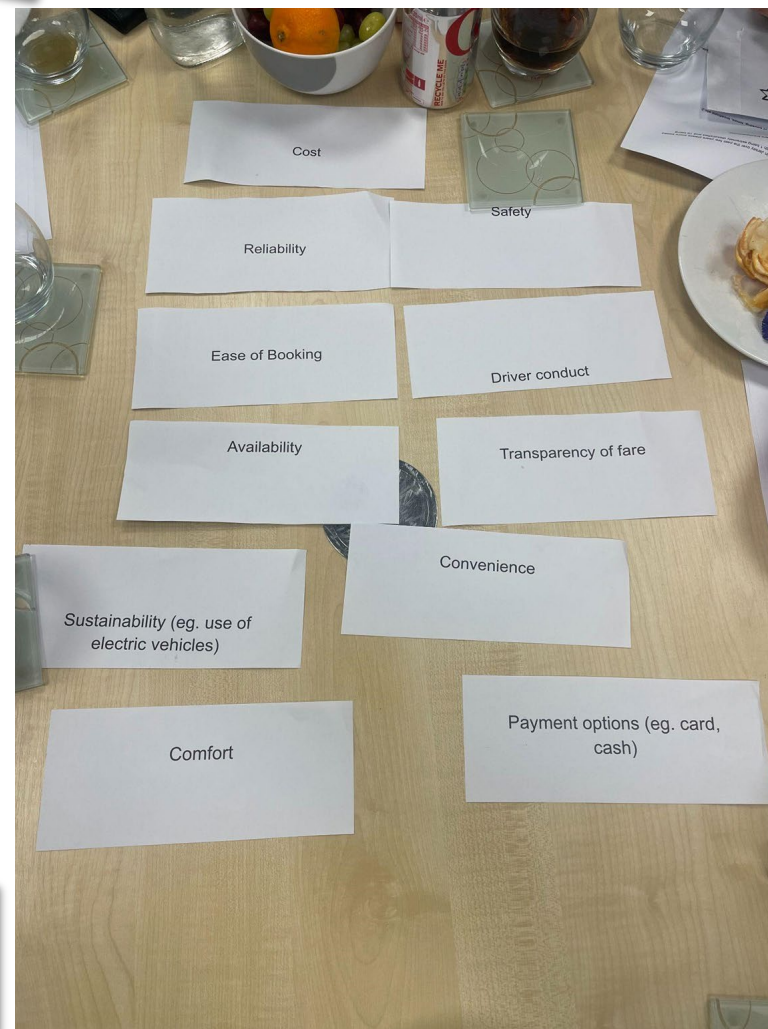
"Payment options, I don't think it's much of an issue anymore"
"They all have SumUp machines"

Group 2 ranking - similar, cost followed by reliability most important

Q. When you think about an ideal taxi experience, what factors are most important to you?

"Cost was the first thing we all said to send to the top."

"Reliability and safety are probably equally important, just behind costs."



"Personally I'm not interested in whether it's an electric vehicle."

"Comfort is low, you know that these vehicles are through the DVS checks. They get checked so they're not going to come with spikes sticking through the seat."

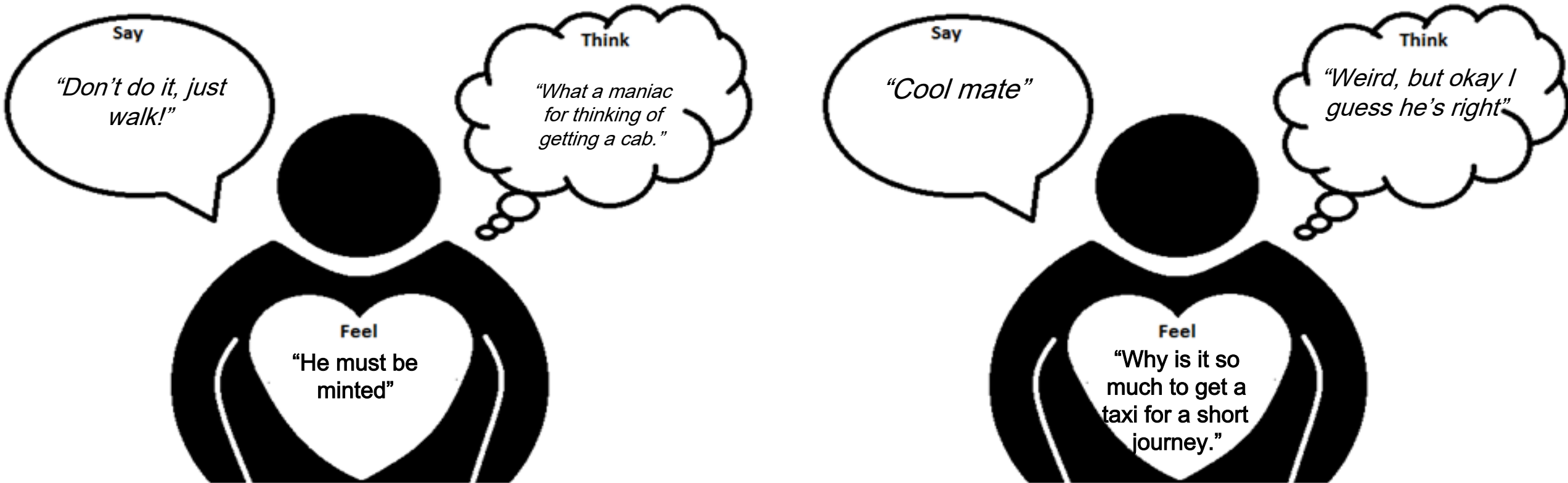
Projective technique revealed concerns around cost, seen as a 'treat' or luxury

We asked participants what a conversation with a friend getting a taxi in Jersey would look like.....



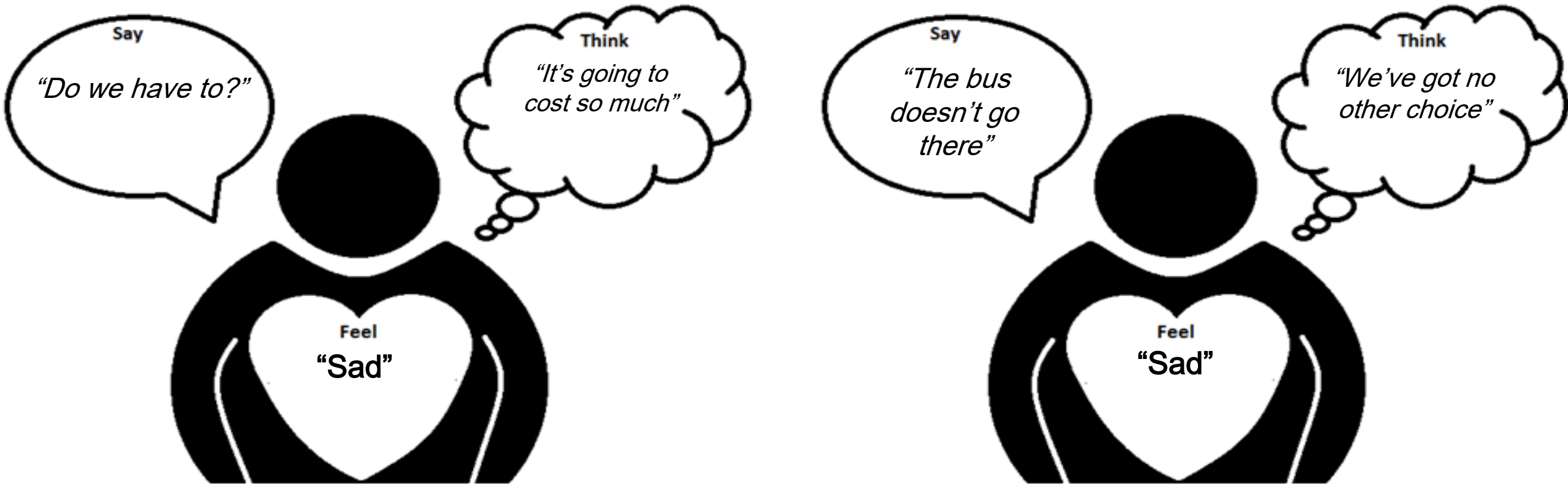
Using taxis avoided. Perceived need to be 'minted' to use them, particularly for short journeys

We asked participants what a conversation with a friend getting a taxi in Jersey would look like.....



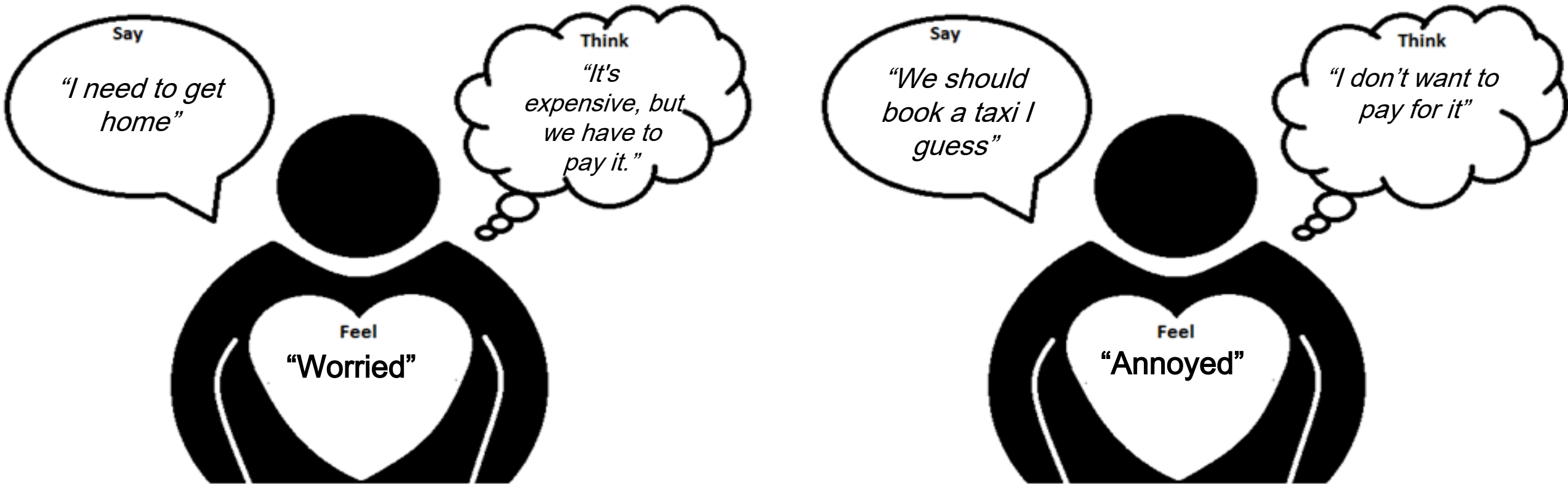
Participants feel sad about being resigned to the high cost and having no other choice

We asked participants what a conversation with a friend getting a taxi in Jersey would look like.....



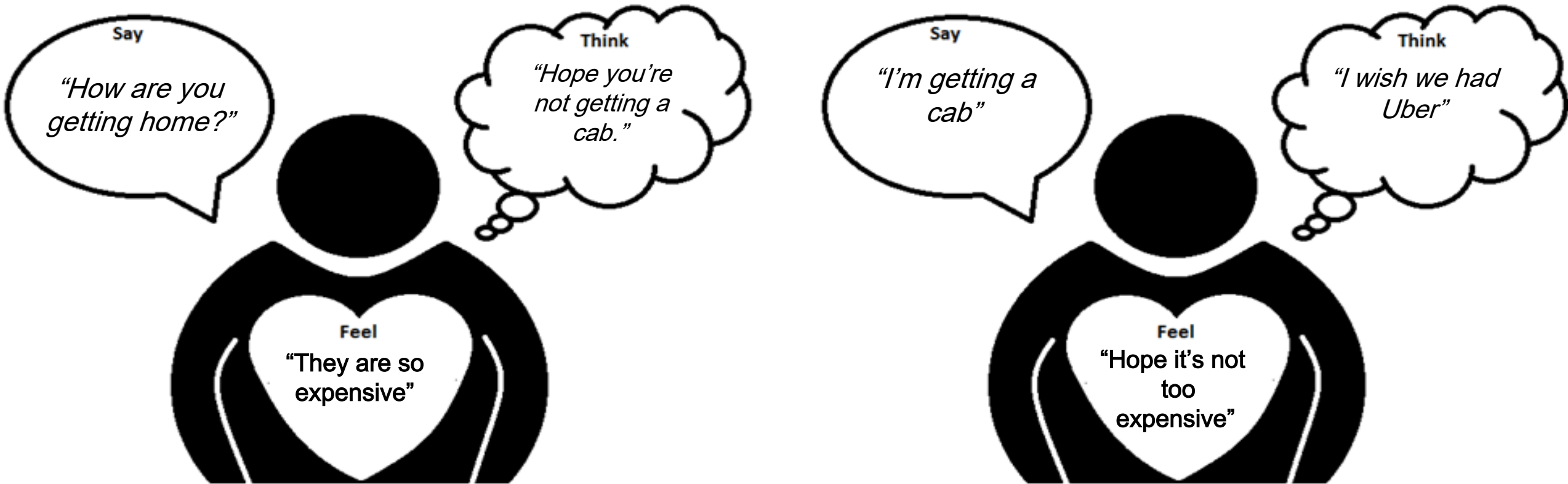
Similar feelings of fear and frustration at costs coming through

We asked participants what a conversation with a friend getting a taxi in Jersey would look like.....



Desire for an 'uber -equivalent' coming through in 'thoughts' section. Feelings of hope that journey won't be too expensive

We asked participants what a conversation with a friend getting a taxi in Jersey would look like.....



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Thank You!

1st Floor, 17 The Esplanade
St Helier, Jersey, JE2 3QA
Tel: +44 (0) 1534 859300
www.4insight.info

