BSNS 6374 Strategic Marketing Communications
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Assignment Two
Target market analysis

Taxis in Auckland

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Executive Summary

Public transport in Auckland is influenced by the vehicle-based transport history of New Zealand. Public transport is less developed than in other countries over the world (e.g. only 35 public transport trips per person and year in Auckland). So we find a good environment and enough demand for taxi industry in Auckland region.

At the stable market of taxi companies (approximately 3.500 vehicles, 700 or 20 per cent of them are from the biggest organisation "Auckland Co-Op Taxis") and customers (around 25 million passengers a year) an **Integrated Marketing Campaign** (IMC) is already **missing**. The idea of this assignments is to promote an existing Auckland taxi company (with at least 100 vehicles).

After analysing the existing framework, trends, consumer behaviour and expectations the central idea for the campaign is to outline and communicate the professionalism of the company and the well-trained drivers, the long-year experience and the safety of the service as **positioning**. The **target audience** is interested in this service. The central three steps for the marketing are:

1. attract the customer at the point of purchase (on the street or ordering at home)
2. satisfying by providing an excellent service
3. use that experience (regular customer, word-of-mouth, feedback)

To reach the **communication objective** ("create a unique and memorable brand") the taxi company will implement a new Corporate Identity (CI) and Design (CD) and use it in all relevant **media vehicles** (mainly at the point-of-purchase).

Concrete ideas for the implementation will be provided in the following "Creative Brief" in two weeks.

1. General framework

Starting point for the target market analysis is the general framework of transport in New Zealand - especially in Auckland, the current market of taxi companies and legislative regulations.

1.1. Transport in New Zealand and Auckland[1]

The big area of New Zealand (74th biggest country of the world) with partly hilly and alpine areas and the small population (with near 4,4 million people only on the 123rd rank) influenced the development of transport forms in New Zealand. The central transport vehicle therefor is the car - New Zealand is car dependent with less public transport like bus or train. Only three per cent of the Government invests to infrastructure are provided per public transport, walking or cycling project. More then 96 per cent are reserved for road projects.

On the 444.000 inhabitants of Auckland City came in June 2009 around 360.000 registered vehicles[2]. That means a rate of 82 per cent. In relation for example the rate in Vienna is only 48 per cent (815.000 registered vehicles and 1.687.000 inhabitants).[3] In whole New Zealand are more than four million cars, vans, trucks, cycles or busses registered, that means that almost for every inhabitant one motorised vehicle[4] is listed (approximately 100 per cent). In Austria the rate is 72 per cent (5.981.000 registered vehicles, 8.355.000 inhabitants).[5]

A second important element of transport is the air transport. In New Zealand there are 113 airports, that is the highest proportion between airports and inhabitants all over the world.

Public transport is - concerning the landscape and the low density of population (201st rank worldwide) - not as important as in other well developed countries like in Australia, North America or Europe. Almost in the biggest agglomeration Auckland public transport is lower developed than in other cities all over the world. Every Auckland inhabitant used public transport only 41 times in 2009, which is one of the lowest rate (e.g. Wellington: 91, Sydney: 114). The Auckland public transport is formed by bus (city and intercity services), train (urban and long-distance services) and ferry. A few data (June 20007 to July 2008) for Auckland region[6]:

Population Auckland region	1.432.200	(34 % of NZ)
Bus (passenger boardings)	43.165.200	(47 % of NZ)
Train (passenger boardings)	6.794.100	(37 % of NZ)
Vehicle kilometres travelled	12.200.000	(30 % of NZ)

Here a comparison to public transport in Vienna, Austria in 2008[7]:

	Auckland region	**Vienna**
Population	1.432.000	1.687.000
Public transport passengers	49.964.000	803.600.000
Transports/person	35	476

The key points after analysing the transport situation in Auckland (and NZ) are:

- movement is based on motor vehicles and air transport because of the landscape
- public transport is low developed

1.2. Status quo and trends in Auckland

In the last years rethinking of people in Auckland could be recognised. The latest “State of the City Report 2010” of Auckland City Council provides a few interesting details and confirmed a strong change to public transport away from cars.

	total June 2009	**change***
registered vehicles	360.303	- 13 %
- thereof motorcycle	7.773	+ 10 %
- thereof motor scooters (<50cc)	3.739	+ 123 %
public transport	32.747	+ 16 %
- thereof train		+ 70 %

* percentage change June 2005 to June 2009

1.3. Competitors and market of taxi companies

The following data and information is based on internet researches, assumptions and calculations. Unfortunately official statistics about the taxi market in Auckland are not available.

The yellow pages listed for the search “Taxi” in Auckland region 105 results.[8] The biggest taxi operator in Auckland are the “Auckland Co-Op Taxis” (09 300 3000) with around 700 vehicles, 1.100 drivers and seven million passengers ever year.[9] Personally I think that is publicity-data. Seven million passenger means that every taxi carries 10.000 passengers per year, that are approximately 27 passengers per day.

The New Zealand Taxi Federation (NZTF) is an organisation with taxi company members from all over the country. The Federation acts as lobby for the taxi industry, companies must not be member of this federation. On the website of the NZTF are only five taxi operators for Auckland (altogether 1.000 taxicabs) listed, small organisations and companies are missing.

The latest data about the market of taxis are available from 2004. Controller and Auditor-General listed for Auckland 3.968 taxis, which means 49 per cent of all New Zealand taxis (together: 8.089 taxis, 1.488 in Wellington and 1.061 in Christchurch).[10] For the further analysis I will expect about **3.500 current taxis in Auckland region**, so that the market leader “Auckland Co-Op Taxis” must have a market share about 20 per cent. Further calculations based on that market share show that the number of passengers (not taxi-rides) in Auckland region must be around 25 to 30 million.

Figure 1: Auckland region market of taxi companies (together approximately 3.500 vehicles)

Additional data came from a research about trip chaining and tours[11]. The authors provide, that taxis were 18 million times part of a trip chain (significant change of location or other trips longer than 90 minutes) per year in the period of 2004-2007, that is 0,5 per cent of all chain trips.

Because every second taxi is located in Auckland, we can expect there nine million trips per year. That means, that every taxi (from the 3.500 fleet in Auckland region) has seven trips per day, that might be to little. Referring to the upcoming study in chapter 2.2 we have to suppose that people are sharing taxis (approximately every second time). So we it is possible that those seven trips per day include about twelve to 15 passengers. So the truth must be somewhere between those 15 and the 27 passenger of the Co-Op taxis. For the upcoming analysis - until we can generate additional knowledge and information - we assume that every taxi vehicle has **20 or more passengers per day by doing 15 or more trips**.

Using the number of taxis a comparison to Australian Cities like Adelaide, Brisbane, Melbourne, Perth or Sydney shows, that New Zealand cities had in 1999 many taxis. In Auckland were 2,93 taxicabs per 1.000 people available, more in Wellington: 3,66. In Melbourne only 0,99, in Perth 0,77 (note: number of taxis in Australia is limited).[12] The current situation in 2010 must be similar: we can calculate an actual supply of **2,44 taxis per 1.000 people** (3.500 taxis and 1,432 million inhabitants). Compared to European cities, the relation is common (e.g. Stockholm: 2,9 or London: 2,3)[13].

Compared to nine other European cities (Amsterdam, Berlin, Brussels, Copenhagen, Dublin, London, Paris and Stockholm) Auckland had the **cheapest taxi fares** for a five-kilometres-ride (EUR 4,90 or 8,75 NZD) in 2005. The prices in cities like Amsterdam or Berlin are double (EUR 11,50 or 20,55 NZD). Also the price for public transport in Auckland is moderate: compared to these cities a ticket for a ten-kilometre-ride by bus (EUR 1,20 or 2,15 NZD) is only in Dublin and Paris cheaper.[14]

1.4. Graphical overview

Figure 2: Comparison of vehicle registration, public and taxi passengers to the population of Auckland region

1.5. Law framework and current topics

For the taxi industry in New Zealand the Government defined three steps and institutions in legislation:[15]

- taxi organisation (manage the fleet)
- passenger service licence holder (someone who has an or is employed by an organisation or person who has a passenger service licence)
- taxi driver itself (not necessarily holder of a passenger service licence)

Responsible for the taxi authorisation and law framework in New Zealand is the NZ Transport Agency (NZTA), a crown entity (state sector organisation) of the New Zealand Government with the headquarters in Wellington. The responsible Cabinet Member is Hon. Steven Joyce, Minister of Transport. Licensed companies get the “Approved Taxi Organisation” (ATO) status from the NZTA after an inspection. This status can be revoked by the entity. The market in general is deregulated and open for everyone (with qualification and after the licensing process), price-building is a procedure of offer and demand.

Current developments and reports about taxi in the news:

- December 2008: A taxi driver died after crash in Christchurch.[16]
- May 2009: Transport Minister Steven Joyce advised NZTA to work together with taxi industry to increase safety for passengers.[17]
- February 2010: A taxi driver was murdered in Mt Eden, Auckland. Taxi drivers ask for new legislative regulations and compulsory security cameras.[18]
- NZ Transport Agency canceled the licence of an Auckland taxi company (AA Yellow Cabs Ltd). The organisation with about 200 cabs lost the ATO-status because of law failures like unlicensed drivers, etc. AA Yellow Cabs Ltd already lost two trials in 2009.[19]
- May 2010: A McDonald's-customer was injured after a taxi driver crashed into the fast food-restaurant in Wellington.[20]
- August 2010: The Government decided to install security cameras in all taxis to increase safety. This regulation is valid for "larger towns and cities" (more than 20 taxis, concrete 18 towns and cities in whole New Zealand) from 2011.[21]
- October 2010: The annual meeting of the New Zealand Taxi Federation has the issue "Taxi Driver Safety and Tourism Opportunities."[22]

Picture 1: Bill Collie, executive member of the New Zealand Taxi Federation shows the optimal position for the new security cameras.[23]

2. Research and analysis

I started the research about customers, audience and their needs, wants and attitudes by talking to colleagues using a short questionnaire (see appendix 1) and asking questions. So I got the possibility to be open minded without any knowledge. Later I will focus on a survey about taxis, implemented by a New Zealand market research institute.

2.1. Personal interviews 2010

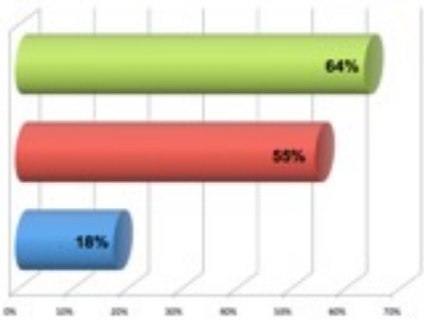
The key facts after my 13 interviews are:

<u>Taxi usage:</u>

- 31 % has not used taxi in the last year
- most of the people use taxi once a month or less
- 31 % never uses public transport
- 38 % has no own car

<u>Top 3 reasons for using taxis:</u>

1. I drank alcohol: 64 %
2. no public transport/too late: 55 %
3. It was cheaper: 18 %



<u>Top reason for not using taxis:</u>

- it is too expensive: 75 %

<u>What taxi companies can improve:</u>

- price: 77 %
- order procedure: 31 %
- friendliness: 23 %
- others: more taxis (23 %)

<u>Other interesting findings:</u>

- taxi-sharing is common (everyone has persuaded other people to share a taxi with him or her)
- if the service will getting better, everyone might be using a taxi
- only the half can remember a taxi-number (most of them: 0800 cheap and 300 3000)

<u>Demo- and geographic:</u>

- 60 % female, 40 % male
- 38 % is younger than 22, 39 % is between 22 and 29, 23 % is 30 years or older
- 69 % from New Zealand or Pacific Islands

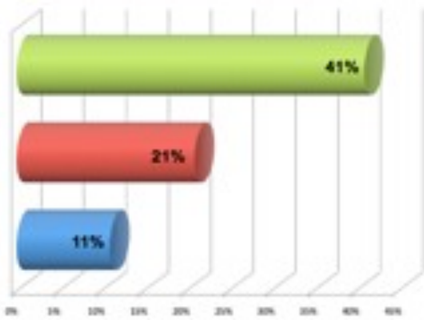
The following study will confirm most of my findings, for differences I will provide interpretations later on.

2.2. Study 2008

The study was prepared for the Commercial Road Transport Unit of the Land Transport New Zealand (today: NZ Transport Agency) by MMResearch in 2008 (if available Auckland data is used, see also appendix 2).[24] Participants of the survey were people over 15 years, they live in Auckland, Hamilton, Wellington, Christchurch or Dunedin and had used taxis at least one time in the last three months.

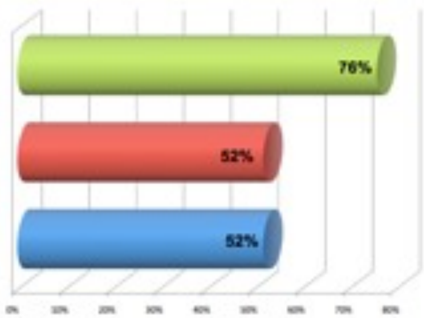
<u>Taxi usage:</u>

- 26 % has not used taxis in the last two months (but one month before)
- 24 % uses taxis more than five times in the last to months
- 70 % would use taxi once per month or less (assumption: people use taxi more often than they want to use it - they need taxis)
- highest avoidance of taxi-usage at the age of 45 and 64
- highest percentage of using taxis once weekly at the age of 15-24 (21 %, assumption: every fifth at this age plans to use taxi after going out)



Top 3 reasons for using taxis:

1. I drank alcohol (including going out): 42 % (most young people)
2. airport-transfer: 21 % (most old people)
3. other transport is unavailable/inconvenient: 11 % (most old people)



Top 3 influences on the taxi choice:

1. reputation: 76 %
2. recommendations (family or friends): 52 %
3. driver (good reputation, knowledge, etc.): 52 %

28 % has bad experience with taxis, top 3 reasons therefor:

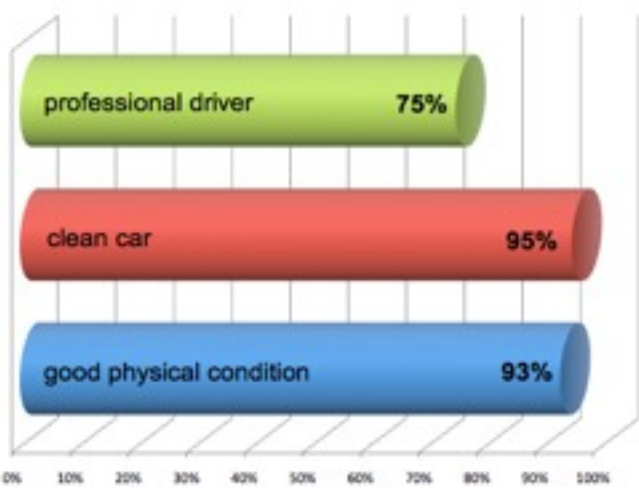
1. taxi driver did not know the route: 31 %
2. rude taxi driver: 20 %
3. dangerous/inappropriate driver behaviour: 17 %

Most named negative experiences of Auckland taxi users:

- bad knowledge about route
- bad English

Ratings about service:

- 37 % said the taxi driver was very professional, 38 % professional (together: 75 %)
- 62 % rated the taxi as very clean, 33 % as acceptable (together: 95 %)
- the physical condition of the car was for 62 % very good and for 31 % reasonable (together: 93 %)



<u>Ratings about safety and security:</u>

- 50 % says that taxis are reasonably safe & secure
- Auckland has the lowest rate of “very safe & secure”-answers (only 28 %)
- 17 % neutral, 2 % not very safe & secure

<u>Other interesting findings:</u>

- 67 % uses mostly the same taxi operator
- 41 % exclude taxi operators form their decision (70 % because of the bad English, only 36 % of the price)
- only 33 % says that taxis are reasonable priced, 91 % says that taxis are more convenient to other public transport
- young people share taxis (60 % at the age of 15-24), older people go alone (69 % at the age of 65+)
- men sit at the front passenger seat (56 %), women on the left rear seat (51 %)
- the whole market share stay constant (people uses taxi same often)
- there is no dominant reason for using taxis more often (highest rate with 18 % for lower taxi fares)
- people who uses taxi less often go more by own car (59 %), do more walking (42 %) or find taxi fares to high (39 %)
- 71 % make no complaint if there is a problem, more than three-quarter think the complaint would be ignored
- if customers made a complaint, the outcome is only for 38 % satisfactory
- fares a rarely discounted (only 8 %) after making a complaints

2.3. Further assumptions

The study of MMResearch is an official survey with more than 400 participants at Auckland region. So this is our key source for the further assumptions and will be supported by my interviews and further research.

- customer do not exclude companies because of the high fares and **price** has only a short influence on the choice (33 %)

- however: the importance of **prices** is not clear, for example: in my personal interviews all people said that the fares should be decrease and the high price a reason for not using taxis
- not the car (interior, cleanliness, physical condition) is the problem - often it is the **taxi driver** (bad English, bad knowledge about route)
- it is hard to attract **new customers** (two-third uses mostly the same taxi operator)
- the **number of customers** stagnates (we cannot expect many new customers, e.g. public transport is getting better)
- **marketing activities** has to address groups and single persons as well (the older people are, the more often they use taxis alone)
- **advertisements** have only short influence on the choice of the taxi operator (only 21 %, in contrast good reputation has 73 %)
- customers are shy to make **complaints** - maybe they tell the bad experience to other people (negative word-of-mouth)
- **demographics**: taxis are common in every age-group (with different motivations), more female uses taxis
- taxi is an **accepted transport vehicle**, if people use taxis they take more than 1,1 rides per month

Aspects they are already not checked and they should be part in common interviews for a better development of the strategy are:

- what time to wait or way to go is acceptable for customers
- expectations of customers about ordering-procedure and channels
- more information about the taxi market in Auckland (interview with taxi-driver)

2.4. SWOT-Analysis

In this case the SWOT-Analysis (internal factors with assumptions for an existing company: strengths, weaknesses and external factors: opportunities and threats) as additional tool for analysing helps to find additional aspects, supports a few of my personal assumptions and concentrates all these findings. Through the results we can define the target audience.

	Strength (a) existing knowledge about the business (b) existing customers	**Weakness** (c) existing image on market (d) bad or no CI/CD (e) no integrated marketing-campaign (f) people think we are too expensive
Opportunity (1) general need and interest in the service of taxis (different reasons and markets, all ages) (2) convenient form of transport (3) weak differentiation between competitors (4) deregulated price-market (5) stable market (6) only one big player (Co-Op) (7) car-focused traffic-planning (8) trend to less own cars (9) bad public transport (mainly at night and weekends) (10) laws and campaigns on drink-driving	(1278910ab) taxi services are needed and sometimes the only alternative, creating satisfaction for customers (5ab) less economical risk	(3ed) implementation of the first IMC-campaign at the Auckland taxi market (3d) bigger recall by creating a unique CI (4f) if necessary and possible, decreased prices (6e) bigger market share through IMC-campaign (78910e) topics can be used for an IMC-campaign
Threat (11) existing behaviour of customers (12) customer has favorite brands (most without reason) (13) customers cannot remember numbers (14) short influence of marketing-campaigns to decision-making (15) safety-discussion in media (16) more passengers using public transport (17) public transport-improvement	(11,12b) hard work to attract new customers (15a) implement security-cameras and communicate it	(11,12c) hard work to attract new customers (13ed) communicate the number or ways to order - supported by a new CD (14e) creating a campaign by highlighting or using strengths to get a better response (15e) could be used in positive way for the campaign as well (17f) taxis may become a luxury-service

Some notes at this stage: Starting this assignment I had a few visions and ideas, how the campaign should look like. The campaign was planned for a new company. After doing my research I decided to change and modify the campaign for an existing taxi operator, because:

- a market entry needs a lot of power (money, human resources, invests, legislation work, administration, etc.)
- it would be hard to become an important part of the Auckland taxicab market, so that the campaign makes sense and is no waste of money
- an Integrated Marketing Campaign (IMC) requires a company with at least 100 vehicles (market share of three per cent)
- an existing company could get a new "face" by the campaign and we can recreate the image - it is no problem to change or relaunch name and number (important is the physical basis in form of cars, drivers, etc.)

3. Learning about customers, market and campaign

Considering the research in the previous chapters we can describe the behaviour of the target audience, the market itself and the request to the upcoming campaign as follows.

3.1. Audience

The typical behaviour of a taxi customer and the process of ordering, thinking, etc. is:

- there is **no typical customer**, everybody needs a taxi service sometimes, maybe there is no alternative (bad mood about taxing a taxi)
- more important is the **reason for using** and choosing a taxi
- looking for a nice car and/or driver (**outward looking**, performance or condition)
- the decision is based on formality, experience or recommendations - often influenced by **emotion** (in which mood is the customer) or **existing behaviour** (using the same company all the time)

- customers are not searching for the best company - they are choosing on the **point-of-purchase** (on the street, when thinking about order a taxi and searching in the internet or looking at sticker, flyer, poster around, etc.)
- the customer is busy, may be to late
- different **physical/psychological** conditions of customers (disabled, drunk, etc.)
- the client is in movement and interact with other people (face-to-face, phone, mail by mobile, etc.) - maybe with the driver, maybe no communication at all
- the customer expect:
  - reliable and safe service (see current discussion about security)
  - professional service through the driver (see negative experiences)
  - 24/7-availability
  - good value for money (maybe they pay a little more for a better service)
  - communication or “entertainment” if required

3.2. Market

The taxi market in Auckland region is:

- stable, less fluctuations in demand within a year (approximately 25 to 30 million passengers per year), some seasonal peaks like at christmas
- constant related to taxi operators, one market leader (20 per cent market share for “Co-Op Taxis”, together approximately 3.500 vehicles)
- confronted by the current discussion about safety (new laws, influence on the opinion of customers)
- at the moment less influenced by cultural change (less individual, more public transport)

3.3. Campaign

As outcome, the campaign should **focus** on following topics and issues:

- the drivers are the pro’s (the know the route, speak English, trainings, etc.)
- safety and security (see actual discussion and developments)
- going by taxi as experience (creating a dominant reason for going by taxi)
- creating a strong corporate identity (CI) with a unique corporate design (CD)

4. First definitions of service and target audience

Target market/audience

Out target market are taxi customers in Auckland region, they interested in professional, valued and safe transport services and want to enjoy their ride with us.

Positioning

We offer taxi-services in Auckland region. Our professionalism is based on long-year experience and we engage the best drivers in the city. They are passioned about the business and get first class trainings. We involve our clients in improvements and are happy about feedback.

Objectives

<u>Business objective:</u>

We increase the number of passengers per five per cent until a year.

<u>Communication objective:</u>

We create a unique and memorable brand by implementing new Corporate Identity and Design (CI and CD), surveys confirm that. Different media vehicles are used to inform, get in contact and interact with the target audience.

Key message

“Professional, reliable and safe!”. The new CI and CD will become an important part of the campaign-messages.

Media vehicles

The choice of media vehicles depends on the upcoming ideas for the creative part of the campaign. I will concentrate on (1) the point-of-purchase (e.g. unique branding of the vehicles), (2) interactive and social media for interaction and (3) activities to create more recall of the brand.

Measurement

The campaign can be easily evaluated by comparing the number of passengers and trips in a period, per driver or vehicle. Other measurements should be defined per used media vehicle - if possible (e.g. response to a mobile-campaign).

5. Conclusion

This target market analysis gives information about the market and behaviour, wants and needs of the target audience. All learning points, findings and assumptions are the basis for the definition process in chapter 4. The "Creative Brief" is the next step and will provide ideas and concepts for implementing, highlighting and communicating those definitions and objectives.

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