County Hall
Cardiff
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AGENDA

Committee	PUBLIC PROTECTION COMMITTEE
Date and Time of Meeting	TUESDAY, 6 DECEMBER 2016, 10.30 AM
Venue	COMMITTEE ROOM 3 - COUNTY HALL
Membership	Councillor Parry (Chair) Councillors Manzoor Ahmed, Boyle, Goddard, Hudson, Kelloway, Morgan, Murphy, Simmons and Lloyd

1 Apologies for Absence

To receive apologies for absence.

2 Declarations of Interest

To be made at the commencement of the agenda item in question, in accordance with the Members' Code of Conduct.

3 Minutes *(Pages 1 - 4)*

To approve as a correct record the minutes of the meetings held on 1 November 2016.

4 Prestige Vehicle Application - Renault Scenic *(Pages 5 - 6)*

5 Taxi Demand Survey *(Pages 7 - 186)*

Davina Fiore
Director Governance & Legal Services
Date: Wednesday, 30 November 2016
Contact: Graham Porter, 029 2087 3401, g.porter@cardiff.gov.uk

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PUBLIC PROTECTION SUB COMMITTEE

1 NOVEMBER 2016

Present: County Councillor Parry(Chairperson)
County Councillors Boyle and Murphy

5 : HACKNEY CARRIAGE/PRIVATE HIRE MATTERS

RESOLVED – That the following matters be dealt with as indicated:

(1) Application 1

Deferred for 2 months.

(2) Application 2

Deferred for 1 month.

(3) Application 3

Application for the grant of a hackney carriage/private hire drivers licence approved.

(4) Application 4

Application for the grant of a hackney carriage/private hire drivers licence approved.

The meeting terminated at 2.30 pm

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CARDIFF COUNCIL
CYNGOR CAERDYDD

PUBLIC PROTECTION COMMITTEE: 6th December 2016 10.15am

REPORT OF THE HEAD OF REGULATORY & SUPPORTING SERVICES

HACKNEY CARRIAGE/PRIVATE HIRE APPLICATIONS

The Committee is requested to determine the following application:-

1. **Martin Edwards – Renault Scenic 1.5** Diesel Registration J9 DAE

   Application to have the Renault Scenic approved as a prestige vehicle with a ten year age restriction.

CARDIFF COUNCIL **Agenda No.**
CYNGOR CAERDYDD

PUBLIC PROTECTION COMMITTEE: 6 December 2016

Report of the Head of Shared Regulatory Services

HACKNEY CARRIAGE VEHICLE LICENCE LIMITATION

1. Background

1.1 The Town Police Clauses Act 1847 and the Transport Act 1985 give local authorities the power to grant hackney carriage proprietor (vehicle) licences. An Authority may limit the number of licences issued provided it has evidence that there is no significant level of unmet demand for the services of hackney carriages.

1.2 In December 2013 the Public Protection Committee resolved to continue the current moratorium placed upon the granting of new hackney carriage vehicle licences as it was satisfied that there was no significant unmet demand. The moratorium was originally implemented in 2010. At the time of writing this report there are currently 944 licensed hackney carriages in Cardiff.

1.3 In its Best Practice Guidance the Department for Transport (DfT) recommends that where local authorities impose a limit on the granting of hackney carriage vehicle licences, an independent survey should be undertaken at no more than three yearly intervals to assess the current levels of demand.

1.4. AECOM Ltd were commissioned by Cardiff Council to undertake an independent survey of Cardiff's taxi demand in February 2016. The full report is detailed in Appendices A - D.

1.5 The overall recommendation of the AECOM report is that there is no significant unmet demand for hackney carriages in Cardiff and that the current moratorium on the granting of new hackney carriage vehicle licences should be maintained.

1.6. This report provides the Committee with further detail of how the survey was conducted and the additional findings of the survey to allow the committee to consider fully the recommendation set out at clause 12 below.

2. Legislation and DfT Best Practice.

2.1 Under section 16 of the Transport Act 1985 a local authority has a discretion, but no obligation, to refuse the grant of a hackney carriage vehicle licence if, it is satisfied there is no significant unmet demand for the service of hackney carriages, within the area to which the licence would apply. This discretion only applies to hackney carriage vehicles and cannot be used to restrict the number of hackney carriage driver's licences or private hire vehicle / driver's licences issued.

2.2 To assess the level of unmet demand the DfT recommends an independent survey is conducted and includes the following considerations:

- **the length of time that would-be customers have to wait at ranks**. However, this alone is an inadequate indicator of demand
- **waiting times for street hailings and for the telephone bookings**. However, waiting times at ranks does not address fully question of unmet demand
- **latent demand**, for example people who have responded to long waiting times by not even trying to travel by taxi. This can be assessed by surveys of people who do not use taxis, perhaps using stated preference survey techniques
- **peaked demand**. It is sometimes argued that delays associated only with peaks in demand (such as morning and evening rush hours, or pub closing times) are not 'significant' for the purpose of the Transport Act 1985. The Department does not share that view. Since the peaks in demand are by definition the most popular times for consumers to use taxis, it can be strongly argued that unmet demand at these times should not be ignored. Local authorities might wish to consider when the peaks occur and who is being disadvantaged through restrictions on provision of taxi services
- **consultation**. As well as statistical surveys, assessment of quantity restrictions should include consultation with all those concerned, including user groups (including people with disabilities, and people such as students or women), the police, hoteliers, operators of pubs and clubs and visitor attractions, and providers of other transport modes
- **publication**. All the evidence gathered in a survey should be published, together with an explanation of what conclusions have been drawn from it and why. If quantity restrictions are to be continued, their benefits to consumers and the reason for the particular level at which the number is set should be set out
- **financing of surveys**. It is not good practice for surveys to be paid for by the local taxi trade (except through general revenues from licence fees). To do so can call in question the impartiality and objectivity of the survey process

3. Taxi Rank Survey

3.1 AECOM completed a comprehensive survey of hackney carriage use at Cardiff's 13 official ranks and 5 unofficial ranks (ranks used on a temporary informal basis by the Trade). The surveys were undertaken over a four month period from March 2016 and June 2016, and a total of 1020 hours of observations were carried out. Details of the survey's area and method used is detailed in AECOM's 'Taxi Rank Operations & Public Attitude Survey Report' in Appendix A

3.2 The survey shows that across all days of the week the average taxi supply significantly exceeds the average passenger demand.

3.3. The average passenger delay was calculated across all ranks. Only 4 official ranks and 1 unofficial rank showed an average passenger delay at all. The PM weekday period at Churchill Way show average delays of 30 seconds and the Sunday inter-peak period show average delays of 12.5 seconds.

3.4 Conversely the average delay for hackney carriages was high with the majority of drivers waiting over 5 minutes for a fare, and in some cases in excess of 2 hours.

3.5 Overall the rank surveys demonstrate that there is no significant unmet hackney carriage demand.

4. Public Attitude Survey

4.1 AECOM conducted a public attitude survey to supplement the rank surveys. The aim of the survey was to obtain information on the public's use of licensed vehicles, and assess their level of satisfaction with the service they received. In total, 733 public attitude surveys were completed.

4.2 The public were asked questions about their use of hackney carriages/private hive vehicles such as the reason for use and the cost of their last trip. The majority responded that their last trip was for leisure purpose. The majority (approx. 12%) of those surveyed stated that their last trip cost between £9 and £10. The majority of those surveyed rated their last trip as 'good' in terms of driver quality, 'average' in terms of price and 'average' in terms of waiting time.

4.3 The public were asked to suggest new locations for taxi ranks. There was little consensus over locations and only 13% responded to this question. 'Outside the City Centre' was the most popular response (4%).

4.4 57% of respondents stated that they felt safe using licensed vehicles in Cardiff, 29% said they did not feel safe and 14% didn't answer the question. Those that responded and stated they did not feel safe were asked to comment on how safety could be improved. The highest ranked answer was for increased police presence at pick up areas.

4.5 The public were asked if they felt there was sufficient availability of hackney carriages in Cardiff. There was a fairly even split with 36% of respondents stating there are sufficient numbers and 44% saying they didn't know, only 8% said there were insufficient numbers of taxis.

5. Stakeholder & Operator Attitude Survey

5.1 The Stakeholder Attitude Survey was conducted online with 11 stakeholders including: student representatives, charities, a tourist attractions, an hotelier, Transport Operator and Cardiff Access Group (representing disabled users)

5.2 The majority of respondents perceived that the availability of taxis and PHVs had increased in the last 3 years.

5.3 AECOM also surveyed 6 private hire operators, the results of which are detailed in Appendix B.

6. Driver & Proprietor Attitude Survey

6.1 Surveys were sent to all licensed drivers and hackney carriage & private hire vehicle proprietors. There was an overlap in some responses as some proprietors are also drivers, which may have led to a duplication of responses. Although drivers are issued with a 'dual' badge in Cardiff, they were asked in the survey whether they predominately worked as hackney carriage or private hire drivers.

6.2 The survey shows that the average number of hours worked per week by hackney carriage drivers is around 40 hours, compared with around 45 hours by private hire drivers. The majority of these hours worked by both hackney carriage and private hire drivers is during the daytime (weekdays).

6.3 Hackney carriage drivers were asked which three ranks they visit most frequently. The top answers were: St Mary Street and Greyfriars Road/Hilton Hotel and Park Place. The average waiting time for a hackney carriage to obtain a fare was stated as over 15 minutes.

6.4 The majority of hackney carriage respondents (56%) stated that their vehicle was wheelchair accessible, whereas 93% of private hire respondents stated that their vehicle was not wheelchair accessible. Despite this the number of disabled passengers carried by private hire vehicles is relatively high.

6.5 The last question of the driver's survey asked whether drivers had been attacked in the last 12 months, whether physically or verbally. Approximately half of carriage drivers stated that they have been verbally attacked in the last 12 month and 13% stated that they have been physically attacked. This compares to 65% of private hire drivers stating that they have not been attacked.

6.6 The vast majority of respondents to both surveys stated they felt there were too many hackney carriage vehicles in Cardiff, and most felt that the current limit on the issue of new hackney carriage licences should be maintained.

6.7 Hackney carriage drivers/proprietors believe that there are not enough taxi ranks in Cardiff. When asked to suggest locations for new ranks, the following were the top answers: Castle Street/Kingsway/Duke Street, and increased space at Central Station. These are similar to the responses given in the previous survey in 2013.

6.8 With regard to levels of enforcement, the majority of private hire drivers and vehicle proprietors stated that there is not enough enforcement. The majority of hackney carriage drivers thought the current level of enforcement was about right.

6.9 The drivers and proprietors surveys ended with an open ended improvements/comments section. The most popular answer given by both drivers and proprietors was that vehicle/driver inspections and checks should be stricter. The 2nd highest response given by proprietors was that there should be restriction on non-Cardiff drivers, The 2nd highest suggestion by taxi drivers was that there should be stricter requirement on becoming a driver. The 2nd most popular response from private hire drivers was there are too many drivers/private hire vehicles.

6.10 The Driver and Proprietor Attitude Survey Report is detailed in Appendix C.

7. Comparison with 2013 Study.

7.1 The 2013 demand study was also carried out by AECOM. This assisted the comparison with the previous results to establish whether there was increase/decrease in unmet demand for hackney carriages.

7.2 The average passenger demand, effective hackney carriage demand, and average hackney carriage supply was compared between 2013 and 2016. The most significant change in results was a reduction in passenger demand on weekday nights by more than 65% since the 2013 survey. The weekend night time peak in passenger demand has shifted one hour later from the 2013 survey to 3am.

7.3 Taxi supply has generally adjusted to the changes in passenger demand which includes a decrease in weekday night supply by around 65% which corresponds with the fall in passenger demand.

7.4 Since 2013 there has been a slight increase in average passenger waiting time from 0.2 seconds to 0.9 seconds, however the survey has highlighted that this may be a result of the data including results of the Sophia Gardens rank which has unique behaviour, due to the National Express bus stop. With the Sophia Gardens results excluded the average passenger wait time reduces to 0.3 seconds, which indicated that the current moratorium on the issue of new licences has not had a detrimental impact on passenger delay.

7.5 In common with the 2013 report is a growing commentary about enforcement. The report indicates a strong consensus across the industry that enforcement (or perception of enforcement) needs to be improved. In particular in the following three areas:

- Vehicle standards;
- Driver regulation; and
- Taxi drivers refusing fares.

Undertaking more work to improve the standards of vehicles can be funded through an increase in vehicle licence fees. However, the fees cannot fund work against recalcitrant drivers and the Council would need to fund this work from the base budget.

8. Consultation

8.1 The trade consultation procedure was undertaken in accordance with the consultation procedure on any policy matters. The draft reports intended for consideration were made available at the licensing offices for any interested party to provide written submissions.

9. Achievability

This report contains no equality personnel or property implications.

10. Legal Implications

10.1 Section 16 of the Transport Act 1985 amended the Town Police Clauses Act 1847 and allowed Councils to restrict the number of Hackney Carriage vehicle licences granted if they wished to do so. It must be noted that this is discretionary.

10.2 In order to satisfy the prescriptive provisions of the Transport Act, before exercising this discretion, the Council must be satisfied that there is no significant unmet demand for the services of hackney carriages.

10.3 This does not mean that the Council must limit the number of hackney carriage vehicle licences issued, even if it is satisfied that demand is met. The effect of the 1985 Act is simply to prevent the Council from restricting the numbers for any other reason.

10.4 Any decision that Council makes about whether to place a limit on the number of Hackney Carriage vehicles or not could potentially be open to challenge by way of Judicial Review. Therefore the Council will need to ensure that it takes all factors into consideration. The decision that it is being asked to make is a discretionary one. The Court will be unlikely to intervene in the exercise of a discretion unless the decision making process is flawed. Any decision would have to avoid being "Wednesbury" unreasonable. This means that the Council will have to take account of relevant considerations, not take into account irrelevant considerations, and come to a decision that a reasonable Council would reach based on the circumstances before it.

10.5 The Department for Transport Guidance referred to in this Report does not have statutory effect. This means that it is not something prescriptive that binds the Council. However, it would be highly unusual for a public body to depart from guidance from national government unless there were good reasons for doing so. In this case Government guidance suggests that a licensing authority's decision of whether or not to limit hackney carriage vehicles should be approached in terms of the interests of the travelling public. Clearly this factor must be taken into account. If Council were to depart from this non statutory guidance, it would have to carefully set out and record its reasons for doing so. If this were not done then, if the Council did limit, any interested party could apply for a Judicial Review of the decision alleging that the Council had failed to take into account a relevant consideration.

10.6 Further, if the Council should set a limit, there is a possibility of challenge by future applicants for a Hackney Carriage licences on the basis that the Council had unreasonably fettered its discretion. Any policy introduced must be kept under review and also be seen to be responsive to changes in the local economy impacting upon the hackney trade.

10.7 There are also suggestions that a limit would create a closed market which could consequently be in restraint of trade. It is the view of the Office of Fair Trading that it is preferable that an open market is maintained.

11. Financial Implications.

11.1 As limitation has been in place since 2010 (reviewed in 2013), to retain the current moratorium on hackney carriage proprietor licences would not result in a change in income.

11.2 Any increased enforcement, clause 7.5 above, would require additional funding out with the current budget.

12.1 Recommendation

12.1 Based on the results of AECOM surveys, the Committee are recommended to approve the continuation of the current moratorium on the issue of new hackney carriage proprietor licences.

Dave Holland **9 November 2016**
HEAD OF SHARED REGULATORY SERVICES

This report has been prepared in accordance with procedures approved by Corporate Managers.
Background Papers: None

APPENDIX A

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Cardiff Taxi Licensing Study 2016

Part 1: Taxi Rank Operations and Public Attitude Survey

Cardiff Council

29 September 2016

Prepared by: Ellena Caudwell / Jacob Hughes.......... Checked by: Stephen Hathaway.......................

Verified by: John Webber....................................... Approved by: George Lunt..................................

Cardiff Taxi Licensing Study 2016: Part 1: Taxi rank Operations and Public Attitude Survey

Rev No	Comments	Checked by	Approved by	Date
1	Issue 1	SH	GL	28/09/2016

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Job No 60484283 Reference M001.001 Date Created August 2016

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E Executive Summary

Executive Summary

E.1 Cardiff Council (CC) controls the issuing of taxi licences in Cardiff. Following a previous study in 2010 where there was no evidence of significant unmet demand, the Council imposed a moratorium on the issue of new taxi licences. This restriction was left in place following a further study in 2013.

E.2 Under DfT Taxi and Private Hire Vehicle Licensing Best Practice Guidance, a new study is required at a maximum interval of three years when a quantity restriction is in place. A new study is now due.

E.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.

E.4 The main objectives of the study are as follows:

- To identify the current level of demand for taxis within Cardiff;
- To assess whether the supply of taxis matches the demand;
- To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
- To identify areas of the service that could be improved.

E.5 In order to meet these objectives six different surveys have been undertaken. These surveys are described in three separate reports, with one overriding report summarising all the information and drawing the key conclusions and making recommendations. The four reports are listed below:

Report	**Surveys**
Cardiff Taxi Licensing Study 2016: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2016: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2016: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2016: Part 4: Summary Report	• Summary of the above surveys

E.1 This report is the Taxi Rank Operations and Public Attitude Survey, which summarises the results of two of the six surveys which have taken place; the taxi rank observations and a public attitude survey. The data collected from these surveys has been analysed to determine the current level of service and market conditions in Cardiff. The key conclusions are listed below:

E.2 The Taxi Rank Surveys showed effective taxi demand and taxi supply follow similar patterns, however a clear oversupply of taxis can be seen across the network. Passenger delay analysis showed no significant delays being experienced by passengers, apart from a small number of anomalous occasions. Average taxi delay was over 5 minutes for the vast majority of locations, and delays could be over two hours in some cases.

E.3 The Public Attitude Survey highlighted a possible lack of understanding of the difference between taxis and private hire vehicles, and little knowledge of the fare structure in Cardiff. However, there was no strong evidence that the moratorium imposed on taxi licences has had a detrimental impact on the public's needs and requirements according to responses from the public in the last three years.

E.4 This is supported by the market condition analysis, which shows a significant amount of unused supply and no significant unmet demand. Passenger delay times do not appear to have changed from 2013 to 2016.

1 Introduction

1 Introduction

1.1 Background

1.1.1 Cardiff Council (CC) controls the issuing of taxi licences in Cardiff. Following a previous study in 2010 where there was no evidence of significant unmet demand, the Council imposed a moratorium on the issue of new taxi licences. This restriction was left in place following a further study in 2013.

1.1.2 Under Department for Transport (DfT) Taxi and Private Hire Vehicle Licensing Best Practice Guidance[1], a new study is required at a maximum interval of three years when a quantity restriction is in place. A new study is now due.

1.1.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.

1.1.4 The term 'Taxi' is commonly used to refer to both Hackney Carriages and Private Hire Vehicles (PHVs). However, for clarification, in this report the term 'Taxi' is used to refer to Hackney Carriages in line with the Law Commission report titled 'Taxi and Private Hire Services'[2]. Where the report includes analysis that refers to PHVs, this will be clearly stated.

1.2 Study Objectives

1.2.1 The main objectives of the study are as follows:

- To identify the current level of demand for taxis within Cardiff;
- To assess whether the supply of taxis matches the demand;
- To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
- To identify areas of the service that could be improved.

1.2.2 In order to meet these objectives six different surveys have been undertaken. These surveys are described in three separate reports, with one overriding report summarising all the information and drawing the key conclusions and making recommendations. The four reports are listed below:

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Cardiff Taxi Licensing Study 2016: Part 4: Summary Report	• Summary of the above surveys

1.2.3 This report is the Taxi Rank Operations and Public Attitude Survey which analyses and summarises the findings of the taxi rank and public attitude surveys to help determine the current level of service and market conditions in Cardiff.

[1] https://www.gov.uk/government/publications/taxi-and-private-hire-vehicle-licensing-best-practice-guidance
[2] https://www.gov.uk/government/publications/taxi-and-private-hire-services

1.3 Report Structure

1.3.1 Following this introduction, the report is structured as follows:

- Section 2 provides the background to the study, including details of the licensed vehicle market in Cardiff and current law and policy;
- Section 3 sets out the methodology of the study, providing details of the surveys and consultations undertaken;
- Section 4 summarises the key results from the taxi rank surveys, including analysis of demand and supply and average waiting times for both passengers and taxis;
- Section 5 outlines the results of the public attitude surveys, including information about existing licensed vehicle usage patterns, perceived service quality and potential improvements;
- Section 6 analyses the results of the various surveys with a view to determining whether there is currently excess demand or excess supply in the taxi market;
- Section 7 compares the 2013 study results with the new 2016 results;
- Section 8 summarises the findings and provides the key recommendations of the study.

2 Study Background

2 Study Background

2.1 Licensed Vehicle Market in Cardiff

2.1.1 Cardiff is one of the fastest growing European Capital cities, and this rapid rate of expansion puts pressure on local transport infrastructure and services. Licensed Vehicles, in the form of Taxis and Private Hire Vehicles, provide an important service to the public allowing them to move round the city.

2.1.2 It is important to understand the differences between taxis and private hire vehicles. A Taxi (also known as Hackney Carriage) can be hailed at the roadside, and will have a 'Taxi' roof sign and a licence plate displayed on the rear of the vehicle. In Cardiff the vehicles are either black with a white bonnet and white licence plate on the rear or a London Cab style vehicle. For clarification, in line with the Law Commission report titled 'Taxi and Private Hire Services'[3] from May 2014, this report will use the term taxi rather than hackney carriage.

2.1.3 A Private Hire Vehicle (PHV) cannot be hailed at the roadside; all private hire vehicles must be pre-booked. There is no light on its roof and a yellow licence plate is displayed at the rear of the vehicle. If a private hire vehicle stops when hailed it is likely that the vehicles insurance may be invalidated.

2.1.4 At the current time Cardiff City Council licenses 901 taxis with a further 49 licences currently on hold. Given that the population of Cardiff is 357,160 (2015 Mid-Year Estimate), this equates to one taxi per 396 people; a slight increase compared with 2010 when the moratorium was originally introduced. In addition, there are currently 1056 licensed private hire vehicles, which is a 28% increase from the 2013 study. The total number of licensed drivers has increased from 2045 to 2148.

Table 2.1
Comparison of Licence Numbers in 2010, 2013 and 2016

Licensed Vehicles/Drivers	2010	2013	2016
Taxis	875	896	901
Private Hire Vehicles	865	827	1056
Drivers	2045	2022	2148

2.1.5 Table 2.2. compares the number of licenced taxis per head of population in a number of local authorities of comparable size to Cardiff. This shows that Cardiff has significantly more taxis per head of population than these other local authorities, with Bristol (1 per 596 people) and Nottingham (1 per 776 people) being the next largest.

Table 2.2
Comparison of Taxi Licences per Population

Location	Population Estimate (2015)	Taxi Licence Numbers	Number of People per Taxi Licence
Nottingham	318901	411	776
Leicester	342627	336	1020
Cardiff	357160	901	396
Dorset	420585	541	777
City of Bristol	449328	754	596

[3] https://www.gov.uk/government/publications/taxi-and-private-hire-services

2.1.6 Taxis operate from 13 official ranks located throughout the city, the locations and hours of operation of which are identified in Table 2.3. It should be noted that the ranks at Saunders Road (Cardiff Central Station) and Heath Hospital are located on private land and are not maintained by the Council. The locations of the ranks are displayed on a map in **Appendix A**.

2.1.7 It is worth noting the closure of two ranks since the 2013 study; namely Central Square (Cardiff Central Station) and Glynrhondda Street.

Table 2.3
Location and Hours of Operation of Official Taxi Ranks

Location	Hours of Operation
(1) Albert Street	24hr
(2) Churchill Way	24hr
(3) Greyfriars Road	24hr
(4) Havelock Street	24hr
(5) Heath Hospital	07:00-23:00
(6) Lower St Mary Street (East)*	19:00-07:00
(7) Lower St Mary Street (West)*	24hr
(8) Mermaid Quay	24hr
(9) Mill Lane (South)	24hr
(10) Park Place	06:00-23:00**
(11) Saunders Road (Cardiff Central Station)	24hr
(12) St Mary Street / Guildhall Pl	24hr
(13) Tredegar St	24hr

*Indicates night time closure due to road closure on weekend nights

**The Park Place rank is officially operational in these hours, but used throughout the night and therefore has been surveyed over the 24hr period

2.1.8 In addition, there are a number of unofficial taxi ranks around the City Centre, which are generally in operation at night. This includes unofficial ranks at Duke Street/Castle Street, Greyfriars Road, St Mary Street (outside O'Neills) and Wood Street/Westgate Street. Sophia Gardens is the current National Express coach stop and there is an unofficial taxi rank for passenger pick-up and drop-off. Table 2.4 summarises the location and approximate hours of operation of each unofficial rank.

Table 2.4
Location and Approximate Hours of Operation of Unofficial Taxi Ranks

Location	Hours of Operation
(A) Duke Street / Castle Street	Informal
(B) Greyfriars Road (Unofficial)	Informal
(C) Sophia Gardens	Coach stop – 24 hrs
(D) St Mary Street (outside O'Neills)	Informal
(E) Wood Street / Westgate Street	Informal

2.1.9 Cardiff Council regulates the fares which are charged by taxis in Cardiff. The fare tariff is split into three main components; the initial fee for entering the vehicle and travelling 103 yards (94.18 m) or part thereof; a distance related charge rate for each subsequent 207 yards (189.28m) travelled; and a time based charge rate for periods when the taxi is not in motion. Additional charges are applied according to the time of day and year, the number of passengers on board and additional bulky items that may be transported in taxis from time to time. The current fare tariff is summarised in Table 2.5.

Table 2.5
Cardiff Taxi Fare Tariff December 2015

Authorised Fare Tariff	
First 103 yards (94.18 metres) or part thereof	£2.30
If distance exceeds 103 yards (94.18m) for first 103 yards (94.18m)	£2.30
For each subsequent 207 yards (189.28m)	£0.20
Waiting Time	
For each period of 48 seconds	£0.20
Extra Charges	
For hiring between midnight and 6 am and on Sundays, and Bank Holidays	£1.00
For hiring between 8pm Christmas Eve and 6am on 27th December and between 8pm New Years Eve and 6am 2nd January	£3.00
For each passenger exceeding four	£1.00 each
For bicycles, cabin trunks (minimum size 36" x 24" x 18") and items of furniture	£0.50 each
The extra charge for night time, Sundays and Bank Holidays will not apply when extra charge for Christmas and New Year applies.	
Contamination	
For the fouling of a vehicle	£50.00
On all journeys within the boundary of the City and County of Cardiff the driver must use the meter which must not exceed the authorised fare scale shown above. Fares for journeys ending outside the area of the City and County of Cardiff, and in respect of which no fare or rate of fare was agreed before the hiring was effected, must not exceed the authorised fare scale as shown above.	

2.2 Licensed Vehicle Legislation

2.2.1 Licensed Vehicle legislation is not set out in any single act, but is fragmented and complex falling under the following five key pieces of legislation;

- The Town Police Clauses Act 1847;
- The Town Police Clauses Act 1889;
- The Transport Act 1985;
- The Local Government Act 1976; and
- The Equality Act 2010.

2.2.2 The Town Police Clauses Act of 1847 set out the regulatory system in respect of taxis. The Act sets out the definition of a taxi, what would be on a licence and how the carriages could operate. The Act made it illegal to ply for trade without a licence with a strict fine for those convicted, and also stated that there would be a fixed penalty for any driver refusing service. The Town Police Clauses Act 1889 contains amendments to the act from 1847.

2.2.3 The Local Government Act 1976 set down the mechanism for the licensing of vehicles and drivers as well as the basis for enforcement. This Act does however concentrate on private hire vehicles. This Act allows the local licensing authority to set conditions for drivers and their cabs if they are considered reasonably necessary, for example in relation to the vehicle style, colour etc. The local authority also has the power to refuse a licence application and to remove a licence if the driver is not seen to be fit to hold it, for any reasonable reason.

2.2.4 Following on from the 1976 Act, the Transport Act 1985 set down the requirements for continued licence control and allows for the control of licence numbers. The Act also set out the conditions under which shared taxis and taxi buses could be introduced. It also covers the provision of designated bays from which taxis could be hired.

2.2.5 The Equalities Act 2010 replaces The Disability Discrimination Act 1995, and covers the requirements for taxi accessibility and other matters in Part 12.

2.2.6 In addition to this legislation is the Department for Transport (DfT) Taxi and Private Hire Vehicle Licensing: Best Practice Guidance. This document sets out the role of licensing and in particular references the best approach to quantity restrictions.

2.3 Policy Context

2.3.1 The Transport (Wales) Act 2006 made provision for a new transport planning system in Wales where the Local Transport Plans (LTPs) prepared by each local authority are replaced with Regional Transport Plans (RTPs) produced by the four regional transport consortia in Wales.

2.3.2 Cardiff Council was one of 10 authorities in the South East Wales Transport Alliance (Sewta), the regional consortium for South East Wales. Sewta's RTP was published in January 2010 following release of the Welsh Assembly Government's Wales National Transport Plan (NTP). Sewta ceased to operate in September 2014. As of January 2015 Cardiff Council adopted a new LTP for 2015-2020, and in January 2016 Cardiff Council adopted a Local Development Plan (LDP) for Cardiff.

2.3.3 Both Cardiff's LTP 2015-2020 and Cardiff's LDP, however, make no direct reference to taxis and private hire vehicles, beyond supporting facilities for taxis to enable transfer between transport modes.

2.3.4 At present there is a moratorium on the issue of new taxi licences, and as such a new study is required to assess the current market within three years of the previous study. This new study should be approached with the interests of the travelling public in mind, and consider what benefits or disadvantages the moratorium has on them, or the removal of the moratorium would have.

2.3.5 The DfT Best Practice Guidance sets the need to demonstrate that there is no evidence of significant unmet demand, and states 'it is sometimes argued that delays associated only with peaks in demand ... are not 'significant' for the purpose of the Transport Act 1985'. However, in line with DfT guidance, significant unmet demand at peak times should be taken into consideration, and will be in this study.

3 Study Scope

3 Study Scope

3.1 Survey Programme

3.1.1 The primary aim of this study is to establish whether there is any significant unmet demand for taxi services in Cardiff. A study was carried out in 2002 which showed that there was a significant unmet demand for taxis in Cardiff and therefore the introduction of a cap could not be justified. A second study in 2010 found there was not any significant unmet demand for taxis in Cardiff, and therefore a moratorium on the issue of new licences was introduced. A subsequent study in 2013 found there was no significant unmet demand and as such the moratorium remained in place.

3.1.2 In accordance with the DfT guidance, when a cap is in place a new study should be carried out up to a maximum of 3 years after the previous study. This study is an update of the 2013 study and therefore uses very similar methods of data capture and analysis.

3.1.3 Two data capture exercises were undertaken, taxi rank observation surveys and a public attitude survey, which together enable both the assessment of the quality of service to existing passengers and the existence of significant unmet demand. The conclusions in this report are largely based on the rank observation results with the data from the public attitude survey being used to provide supplementary information.

3.2 Taxi Rank Surveys

3.2.1 The taxi rank survey programme was undertaken over a four month period from March 2016 to June 2016. During this period a total of 1020 hours of observations were undertaken across 13 official and 5 unofficial taxi ranks in Cardiff.

3.2.2 Manual observations were carried out across a range of days and time periods encompassing weekdays (Monday to Friday), weekends (Friday night and Saturday) and Sundays. At each rank, surveyors recorded the supply and demand for taxis in 5 minute intervals throughout the survey period. Table 3.1 shows the total number of hours observed at each taxi rank. Where some ranks were closed or not operational for certain periods this has been noted below. Some ranks were observed via video footage rather than on street observations.

Table 3.1
Allocation of Taxi Rank Observations

Location	Hours Observed
Albert Street	72.00[1]
Churchill Way	72.00[1]
Greyfriars Road	72.00
Havelock Street	72.00[1]
Heath Hospital	48.00
Lower St Mary Street (East)	72.00[1,2]
Lower St Mary Street (West)	72.00[2]
Mermaid Quay	72.00
Mill Lane	72.00
Park Place	64.00[1]
Saunders Road (Cardiff Central Station)	72.00
St Mary Street / Guildhall Place	72.00
Tredegar Street	72.00
Duke Street / Castle Street*	9.50
Greyfriars Road (Unofficial)*	5.08
Sophia Gardens*	72.00
St Mary Street (outside O'Neills)*	17.92
Wood Street / Westgate Street*	12.08

* Unofficial taxi ranks.

[1] A total of 72 hours of observations were carried out, but this did not cover the full Weekend period. The extra data collected during the Weekday period has been excluded from the subsequent analysis

[2] Time inclusive of road closure on Friday and Saturday (Weekend) nights – 21:00-04:00

3.3 Public Attitude Survey

3.3.1 A survey of 733 people was conducted in Cardiff City Centre across four months between May 2016 and August 2016. The aim of the survey was to assess peoples' views on the quality of the taxi and private hire vehicle services in Cardiff.

3.3.2 In 2010, the survey response was controlled by quotas on age and sex of respondent linked to 2001 Census data for Cardiff residents. This approach was not replicated in the 2013 study as it is recognised that the users of licensed vehicles in Cardiff include other groups as well as local residents, and the same approach has been used in this study. However, the survey responses have been compared to the 2011 Census data for Cardiff to ensure that they remain reasonably representative of the current demographics in the City, as shown in Section 5.

4 Results of Taxi Rank Surveys

4 Results of Taxi Rank Surveys

4.1 Survey Response

4.1.1 In order to construct a representative profile of demand at each rank over the period of a week, a number of assumptions are made.

4.1.2 Firstly 'daytime' observations refer to observations made between 07:00 and 18:59 hours, and 'night time' observations refer to observations made between 19:00 and 06:59 hours. These are then divided further into distinct time periods, which are designed to represent different types of activity. The hours covered by each time period are defined in Table 4.1 below.

Table 4.1
Definition of Time Periods[4]

Time of Day	Time Period	Hours
Daytime	AM Peak (AM)	07:00 – 09:59
	Interpeak (IP)	10:00 – 15:59
	PM Peak (PM)	16:00 – 18:59
Night time	Off-peak night (OPN)	19:00 – 23:59
	Off-peak morning (OPM)	00:00 – 06:59

4.1.3 Secondly, the week has been split into three day types – Weekday, Weekend and Sunday. These day types are defined as follows:

Table 4.2
Definition of Day Types

Day Type	Time Period
Weekday	07:00 Monday to 18:59 Friday
Weekend	19:00 Friday to 06:59 Sunday
Sunday	07:00 Sunday to 06:59 Monday

4.1.4 Each of the 13 official taxi ranks was surveyed on a weekday, weekend and a Sunday. Table 4.3 summarises the number of hours of observations that were carried out at each of the taxi ranks on each day in each time period. During the periods surveyed some 14,723 passengers and 8,319 taxi vehicles were observed to depart from the taxi ranks.

[4] The time periods are standard definitions which refer to the prevailing traffic conditions rather than specifically to taxi usage.

Table 4.3
Taxi Rank Observations (No. of hours surveyed)

Taxi Rank	Weekday					Weekend					Sunday				
	AM	IP	PM	OPN	OPM	AM	IP	PM	OPN	OPM	AM	IP	PM	OPN	OPM
Albert Street	3	6	3	5	7	3	6	2.9	5	7	3	6	3	5	7
Churchill way	3	6	3	5	7	3	6	2.9	5	7	3	6	3	5	7
Greyfriars Road	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Havelock Street	3	6	3	5	7	3	6	2	5	7	3	6	3	5	7
Heath Hospital	3	6	3	4	0	3	6	3	4	0	3	6	3	4	0
Lower St Mary Street (East)	6	12	6	5	7	0	0	0	3*	3.1*	3	6	3	5	7
Lower St Mary Street (West)	3	6	3	5	7	3	6	3	3.3*	3.1*	3	6	3	5	7
Mermaid Quay	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Mill Lane (South)	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Park Place	3	6	3	5	7	3	6	2.9	5	7	3	6	3	4	0
Saunders Road	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
St Mary Street/Guildhall Place	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Tredegar Street	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Duke Street/ Castle Street	0	0	0	0	0	0	0	0	2.9	6.6	0	0	0	0	0
Greyfriars Road (Unofficial)	0	0	0	0	0	0	0	0	1.6	3.5	0	0	0	0	0
Sophia Gardens	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
St Mary Street (O'Neills)	0	0	1	5	6	0	0	0	2.1	3.8	0	0	0	0	0
Wood Street	0	0	0.1	0	0	0	0	0	3.2	3.3	0	0	0	0	0

Grey squares indicate periods when checks were carried out but no activity was observed.
'*' indicates where night time road closures have shortened observation time.

4.1.5 This table shows that across the survey period there was almost complete coverage of all ranks on a weekday, weekend and on a Sunday. The unofficial ranks have limited coverage, however, this is primarily due to the fact that they are not in use for long periods and therefore no observations have been carried out during these times.

4.2 Survey Methodology

4.2.1 As in 2013, the taxi rank surveys record all passenger and taxi activity at each rank in 5 minute intervals. The surveys record all taxis departing from the rank during the 5-minute period and the number of passengers in each vehicle. The surveys also record the number of passengers and/or taxis queuing at the rank at the end of each 5-minute period. The surveys also record any potential customers who walked away from a rank without getting into a taxi and/or any taxis that drive away from the rank without getting a fare.

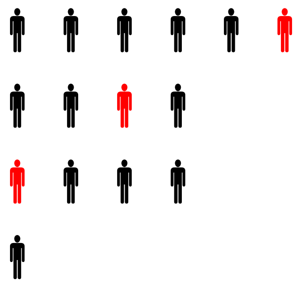
4.2.2 Using this data, it is possible to calculate a wide range of indicators that are useful in determining the prevailing market conditions. Firstly, the record of all taxis leaving the rank and the number of passengers in each can be used to determine the total passenger demand and the total taxi supply in each 5-minute period and also the average vehicle occupancy (i.e. the average number of passengers per vehicle).

4.2.3 When making a comparison between the demand for and the supply of taxis, it would be inaccurate to directly compare passenger demand and taxi supply, as more than one person will often share a taxi. In order to make a direct comparison it is necessary to estimate the effective taxi demand; that is, the number of taxis that would be required to serve the existing passenger demand, assuming that current taxi occupancy rates remain the same. Effective taxi demand is calculated by dividing the average passenger demand by the average taxi occupancy.

4.2.4 Finally and most importantly, using the passenger and taxi activity data and the queue length at the end of each 5-minute period, it is possible to estimate how long each person and taxi in the queue at the end of a 5-minute period has been waiting. This calculation assumes that the queue is arranged in the order that people arrive and therefore the first people to depart in each 5-minute period will be the people who have been waiting the longest. The following example illustrates the calculation methodology (refer to Figure 4.1).

Figure 4.1 – Example Passenger Demand Data

Time Period	Passenger Arrivals	Passenger Departures	Queue Length	Queue Profile
T			6	
T+1	1	3	4	
T+2	2	2	4	
T+3	2	5	1	



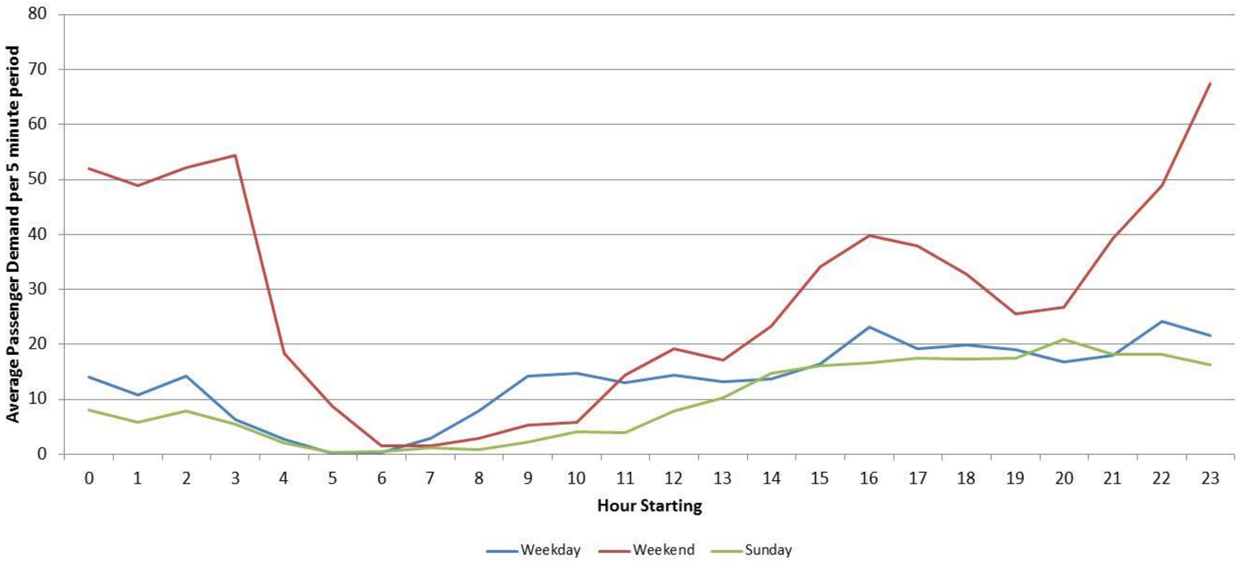
4.2.5 The passenger indicated in red arrives at some point in time period T and is at the back of the queue (6th) at the end of that period. During the following 5-minute period, T+1, 3 passengers depart leaving the red passenger 3rd in the queue, while 1 person has joined behind. In the next time period, T+2, 2 further passengers depart, leaving the red passenger at the front of the queue with three further passengers behind. In time period T+3, 5 passengers including the red passenger depart. It can be calculated that the red passenger has waited two full 5-minute period (T+1 and T+2), plus the time taken to obtain a taxi in period T+3. As the passenger was the first of five passengers to depart in this period and assuming that passengers departed at regular intervals, it is estimated that the passenger has waited 1 minutes in time period T+3, giving a total wait time of 11 minutes. This figure ignores the time spent waiting in time period T as it is unknown exactly when the passenger joined the queue. On this basis it can be considered to be a conservative estimate of the passenger's wait time.

4.2.6 The wait time is calculated in this manner for all passengers in the queue at the end of each 5-minute period and also for any passengers that have departed during that 5-minute period. An average is taken, which represents the overall average wait time for passengers at that rank during that 5-minute period. A similar calculation can be performed for taxis to estimate their average wait time during each 5-minute period.

4.3 Passenger Demand

4.3.1 The data collected from the taxi rank surveys has been used to estimate overall passenger demand by day type and time period from which the peak passenger demand across the city can be derived. Figure 4.2 shows the average passenger demand in a 5 minute period in each hour for weekdays, weekends and Sundays. Passenger demand was also calculated by rank; copies of the graphs showing each ranks passenger demand and taxi supply data can be found in **Appendix B**.

Figure 4.2
Average Passenger Demand (All Taxi Ranks)



4.3.2 A number of key observations can be made from this graph. Firstly, passenger demand is peaked, particularly on weekend nights, with greatest demand occurring in the late evening and early morning when other transport choices are limited.

4.3.3 On weekdays, passenger demand builds from around 7am, plateauing at 9am with average demand of around 14 passengers every 5 minutes across all ranks. Passenger demand remains within the range of 13-15 passengers until 3pm when the demand rises to a daytime peak at 4pm of 23 passengers every 5 minutes. Between 5pm and 9pm there is a steady demand of between 16 and 20 before the peak of 24 passengers per 5 minutes at 10pm. From 6am to 11pm the taxi rank showing greatest average passenger demand is Saunders Road close to Cardiff Central Station, where the peak average passenger demand per 5 minute period reaches 8 at 10am. This suggests the peak demand may be attributable to train passengers. The rank on Churchill Way has a sharp rise in passenger demand in the afternoon between 3pm and 7pm, with a peak of nearly 5 passengers per 5 minutes at 4pm. The busiest ranks during the weekday night time are Lower St Mary Street (West), Greyfriars Road and the unofficial rank on St Mary Street, all of which are near local bars and clubs.

4.3.4 Weekend daytime demand follows a similar pattern to weekday use although reaches much higher levels of demand. Passenger demand starts from close to zero at 7am and rises steadily throughout the morning, although it is generally lower than during the weekday. By 11am, average demand exceeds weekday demand and continues to rise through the afternoon with peak daytime demand occurring around 4pm when there are on average 39.8 passengers per 5 minute period. The busiest ranks in the weekend daytime period (07:00 – 18:59) are Saunders Road which serves the Cardiff Central Station, Lower St Mary Street (West) and Mermaid Quay. After 4pm, there is a slight reduction in demand until 8pm, at which point demand starts to build steadily towards the 11pm peak.

4.3.5 During the weekend night time period the demand for taxis builds steadily from 8pm, peaking at 11pm when the average demand per 5 minute period across all taxi ranks is 67.4 passengers, with demand remaining between 48 and 55 passengers per 5 minutes from midnight to 3am. The most heavily used rank during this peak period is the unofficial rank on St Mary Street, with an average of 17.8 passengers departing per 5 minute period between 11pm and midnight. Mermaid Quay is also busy before midnight, and after midnight the unofficial ranks at Castle Street/Duke Street and Greyfriars Road are the busiest ranks. The popularity of these ranks is most probably due to their proximity to many of the city centre bars and night clubs which close around this time, with many patrons opting to travel home by taxi rather than using other means of transport (e.g. night buses).

4.3.6 Taxi demand is generally lower on Sundays, but follows a similar pattern and level to weekday demand. Demand rises steadily between 8am and 8pm although demand is well below the weekday periods in the morning. Between 2pm and 9pm average passenger demand is at a similar level to weekday demand. Sundays still exhibit a night time peak, however it occurs earlier and demand is lower than during the weekday and particularly the weekend periods. The Sunday peak occurs around 8pm with average demand of 21 passengers per 5 minutes period. The key ranks used during this peak are Saunders Road, St Mary Street/Guildhall Place and Mermaid Quay.

4.4 Taxi Occupancy

4.4.1 As part of the taxi rank survey, the number of passengers that departed in each taxi was recorded. Using this data, it is possible to calculate the average taxi occupancy and see whether there are certain locations or time periods were average occupancy is particularly high or low. Table 4.4 summarises average taxi occupancy by day, time period and location.

4.4.2 The overall average occupancy over all locations and time periods is 1.7 passengers per taxi. There is limited variation by day type. Weekdays have the lowest average occupancy at 1.5, followed by Sundays at 1.7 passengers per taxi, with weekends having the highest average occupancy at 1.9 passengers per taxi.

4.4.3 On weekdays, taxi occupancy is higher in the off-peak period than during the daytime, perhaps reflecting that a higher proportion of taxi journeys made in the evening and night time are leisure related, with people travelling in larger groups to and from their destinations, while daytime taxi usage is largely business related, with many passengers travelling alone or in small groups.

4.4.4 At weekends, there is a noticeable increase in average taxi occupancy in the PM period, where average occupancy is 2.1 passengers per taxi. This is largely related to high occupancy rates at Sophia Gardens where passengers are arriving into Cardiff on coaches, Lower St Mary Street (West) and Mermaid Quay. The inter-peak and off-peak morning averages are both 1.9 passengers per taxi, but the ranks contributing most to these numbers are different in each period. The off-peak average is likely to be pushed up by the high proportion of people who use taxis to get home after a night out, with the ranks closest to the pubs and nightclubs – Lower St Mary Street (East and West), Greyfriars Road, and the unofficial Castle Street/Duke Street and Wood Street ranks – all having the averages of 2 or more passengers per taxi. The inter-peak period occupancy rates are highest at Saunders Road, Mill Lane and Mermaid Quay, which could be attributed to the train station and local shops and attractions.

4.4.5 There is less variation in taxi occupancy levels on Sundays, with only the morning peak average (1.2 passengers per taxi) significantly lower than the daily average of 1.7. However, looking at individual ranks, Tredegar Street and Mermaid Quay experience an average occupancy of 2 or above passengers per taxi across the day, and these ranks are close to shops and attractions.

Table 4.4
Average Taxi Occupancy

Location	Weekday						Weekend						Sunday						Overall
	AM	IP	PM	OPN	OPM	Daily	AM	IP	PM	OPN	OPM	Daily	AM	IP	PM	OPN	OPM	Daily	
Albert Street	1.2	1.4	1.8	1.7	2.0	1.4	1.1	1.7	1.8	1.5		1.6	1.0	2.1	1.7	1.5	1.0	1.8	**1.6**
Churchill way	1.0	1.4	1.8	1.7	1.4	1.6	1.3	1.5	2.2	1.9	1.9	1.9	1.3	2.0	2.0	1.7	2.1	1.9	**1.8**
Greyfriars Road	1.4	1.6	1.7	1.7	1.8	1.7	1.5	2.0	1.9	1.9	2.0	1.9	1.3	1.5	2.1	1.8	2.0	1.8	**1.8**
Havelock Street								1.0			1.0	1.0							**1.0**
Heath Hospital	1.6	1.3	1.3	1.5		1.4	1.3	1.3	1.3	1.3		1.3	1.0	1.3	1.5	1.0		1.3	**1.3**
Lower St Mary Street (East)				1.0	1.0	1.0					2.1	2.1							**1.9**
Lower St Mary Street (West)		1.5	1.7	1.8	2.3	2.0	1.4	1.9	2.7	1.7	2.2	2.1		1.8	1.6	1.5	1.7	1.7	**1.9**
Mermaid Quay	1.0	1.6	1.5	1.7	2.3	1.6	1.0	2.2	2.5	2.0	1.7	2.1	1.3	2.2	2.1	1.9	2.0	2.0	**1.9**
Mill Lane (South)	1.2	1.5	1.7	1.5	1.5	1.5	2.0	2.3	2.2	2.3	1.9	2.2	1.3	2.0	2.3	1.7	1.8	1.9	**1.9**
Park Place	1.1	1.2	1.7	1.6	1.3	1.4	1.5	1.6	2.0	1.6	1.6	1.6	1.3	1.8	1.8	1.6		1.7	**1.6**
Saunders Road	1.3	1.3	1.4	1.3	1.6	1.3	1.9	2.4	2.3	1.7	1.2	2.0	1.4	1.5	1.4	1.5	1.7	1.5	**1.6**
St Mary Street/Guildhall Place	1.0	1.3	1.3	1.8	1.7	1.5	1.3	1.7	1.5	1.6	1.8	1.7	1.0	1.4	1.7	1.7	1.4	1.5	**1.6**
Tredegar Street		2.0		3.0		2.3		1.0	2.0	2.0	3.0	2.0		2.0	2.0	4.0		2.7	**2.3**
Duke Street/ Castle Street										1.7	1.9	1.8							**1.8**
Greyfriars Road (Unofficial)										1.8	1.9	1.9							**1.9**
Sophia Gardens	1.8	1.5	1.6	2.1	1.0	1.6		1.9	2.7	1.7	1.9	1.9		1.3	1.0	1.3	1.1	1.2	**1.6**
St Mary Street (O'Neills)				1.8	1.8	1.8				2.1	1.9	1.9							**1.9**
Wood Street										1.7	2.0	1.8							**1.8**
Grand Total	**1.3**	**1.4**	**1.6**	**1.7**	**1.8**	**1.5**	**1.5**	**1.9**	**2.1**	**1.8**	**1.9**	**1.9**	**1.2**	**1.7**	**1.9**	**1.7**	**1.8**	**1.7**	**1.7**

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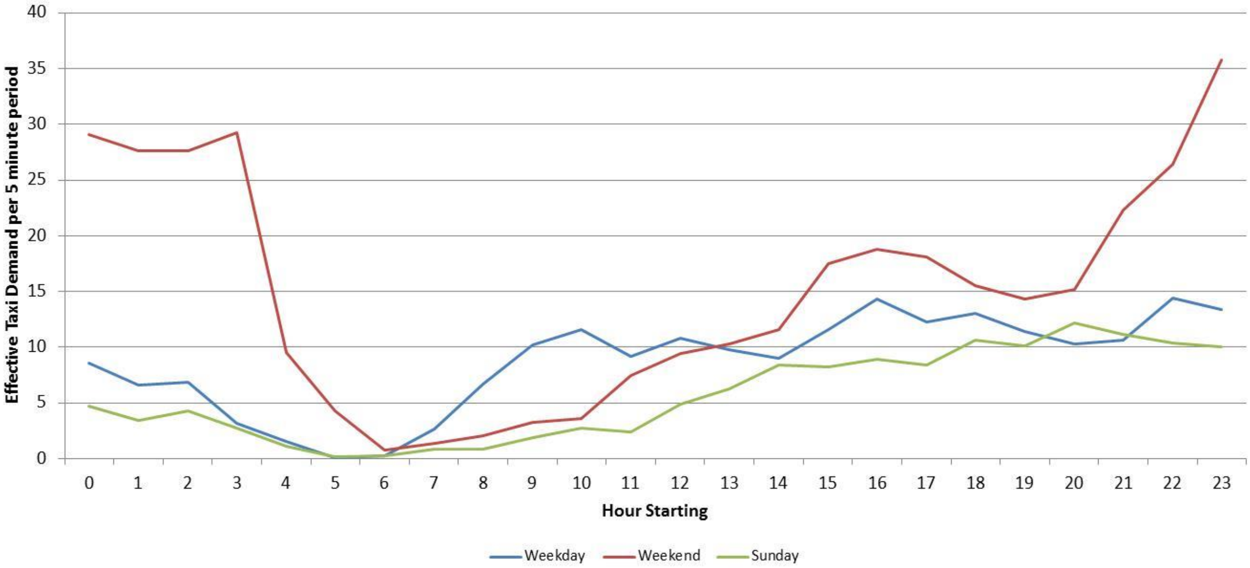
4.5 Effective Taxi Demand

4.5.1 As noted above, the effective taxi demand represents the number of taxis that would be required to serve the existing passenger demand, assuming that current taxi occupancy rates remain the same and is calculated by dividing the average passenger demand by the average taxi occupancy. Figure 4.3 shows the effective taxi demand across all taxi ranks on a weekday, weekend and Sunday.

Figure 4.3
Effective Taxi Demand (All Taxi Ranks)

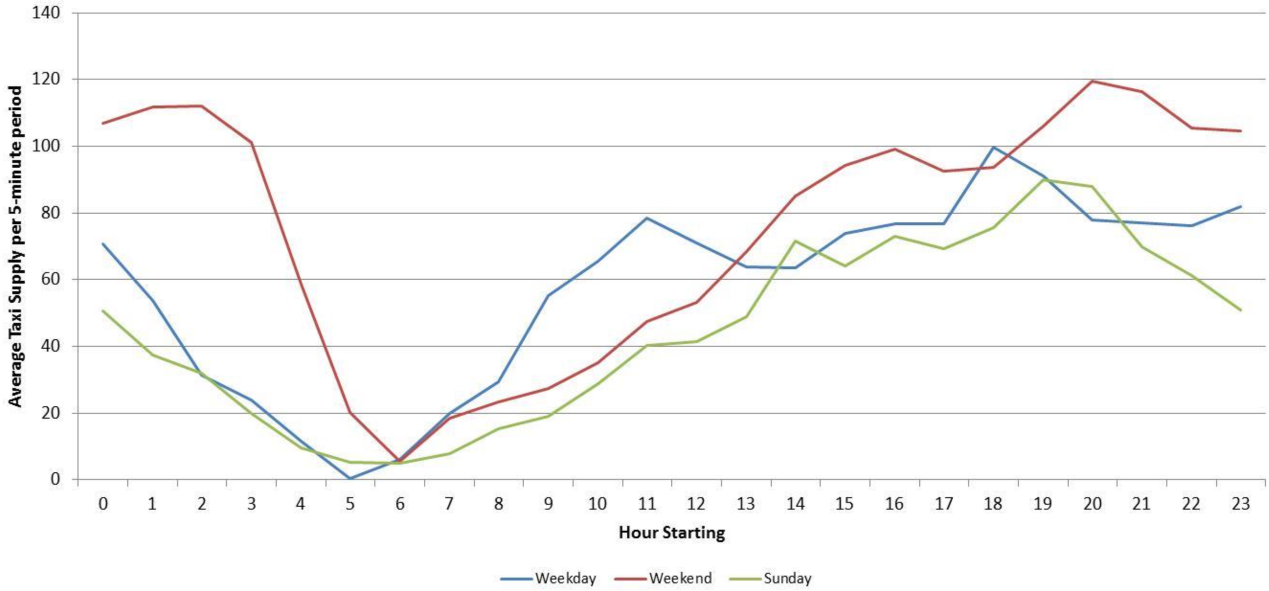


4.5.2 Comparing Figure 4.3 with Figure 4.2, it is evident that the effective demand follows broadly the same pattern as passenger demand but is approximately half the intensity, which is to be expected given that average taxi occupancy is relatively constant at around 1.7 passengers per vehicle. The main difference is in the weekday daytime period, where the effective demand is consistently greater than the Sunday effective demand, due to the lower taxi occupancy rates on a weekday.

4.6 Taxi Supply

4.6.1 As well as recording passenger demand, the taxi rank surveys also recorded the number of taxis departing in 5 minute intervals and the number of taxis queueing at the end of each 5-minute period. This data has been used to identify the pattern of taxi supply across the week. Figure 4.4 shows the average taxi supply across the city centre by day type and hour. Analysis of the taxi supply at each rank is provided in **Appendix B**, where it is directly compared to passenger demand and effective taxi demand.

Figure 4.4
Average Taxi Supply (All Taxi Ranks)



4.6.2 Figure 4.4 shows that taxi supply across Cardiff varies through the day. Overall taxi supply broadly follows passenger demand and effective taxi demand, however, the peaks and troughs are less pronounced. Each day type follows a similar pattern, with the only noticeable differences being the Weekend evening/night time and the weekday 7am-12pm period. On all day types there is a dip in supply during the early hours of the morning (4am to 7am), reflecting the limited demand for taxis during this period. On weekends, taxi supply is generally higher than on weekdays and Sundays.

4.6.3 Weekday daytime supply increases steadily from 5am to 11am by which time there are around 79 taxis available. Supply remains relatively stable between 10am and midnight, although there is a slight dip in supply between 12pm and 2pm. There is a peak in taxi supply at 6pm when there are approximately 100 taxis available whilst at the low point between 4am and 6am, there are only around 1-11 taxis available. During the day the most well supplied rank by far is Saunders Road, which serves Cardiff Central Station. There is a limited supply of taxis at some ranks, with Lower St Mary Street (East), Tredegar Street and Havelock Street having almost no supply at all.

4.6.4 Weekend taxi supply climbs steadily between 6am and 8pm apart from a dip around 5pm to 6pm, possibly coinciding with dinner periods. The peak taxi supply is at 8pm, which is 3 hours before the peak passenger demand occurs. At this point the supply of taxis reaches approximately 120 across all ranks, with Saunders Road and St Mary Street/Guildhall Place having the highest supply of 21.5 and 16.8 taxis available per 5 minutes. The taxi supply at the Saunders Road rank then begins to drop rapidly reflecting reduced demand, whereas St Mary Street/Guildhall Place supply increases a little into the night time period. The supply at unofficial ranks such as Duke Street/Castle Street and St Mary Street which are close to the city centre bars and clubs, increase from 10pm before starting to drop away from 3am.

4.6.5 Sunday shows a similar pattern to other day types, but with less extreme peaks. Peak supply occurs at 7pm, when there are around 90 taxis available. The busiest rank is Saunders Road, with St Mary Street/Guildhall Place being the next best served rank.

4.7 Comparison of Taxi Demand and Supply

By comparing ‘effective taxi demand’ with ‘taxi supply’, it is possible to get an indication of whether the taxi market in Cardiff is operating in equilibrium (i.e. demand and supply are broadly matched), or whether there are too many or too few taxis. Figures 4.5 – 4.7 show the relationship between taxi supply, passenger demand and effective taxi demand on a weekday, a weekend and a Sunday.

Figure 4.5
Comparison of Demand and Supply: Weekday

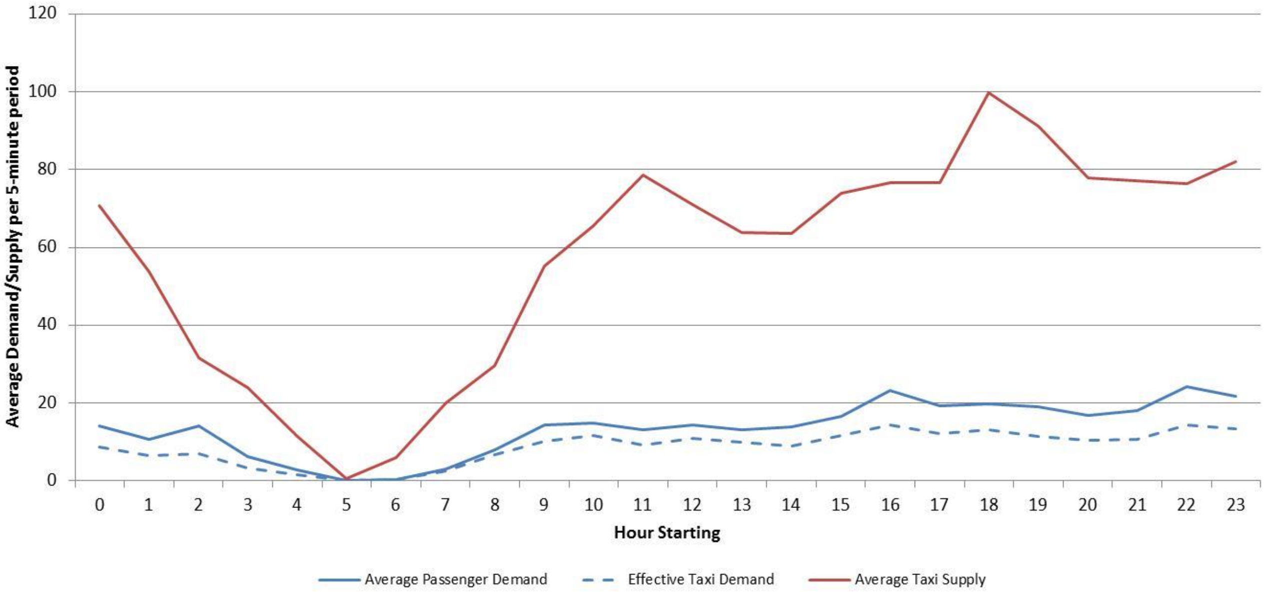


Figure 4.6
Comparison of Demand and Supply: Weekend

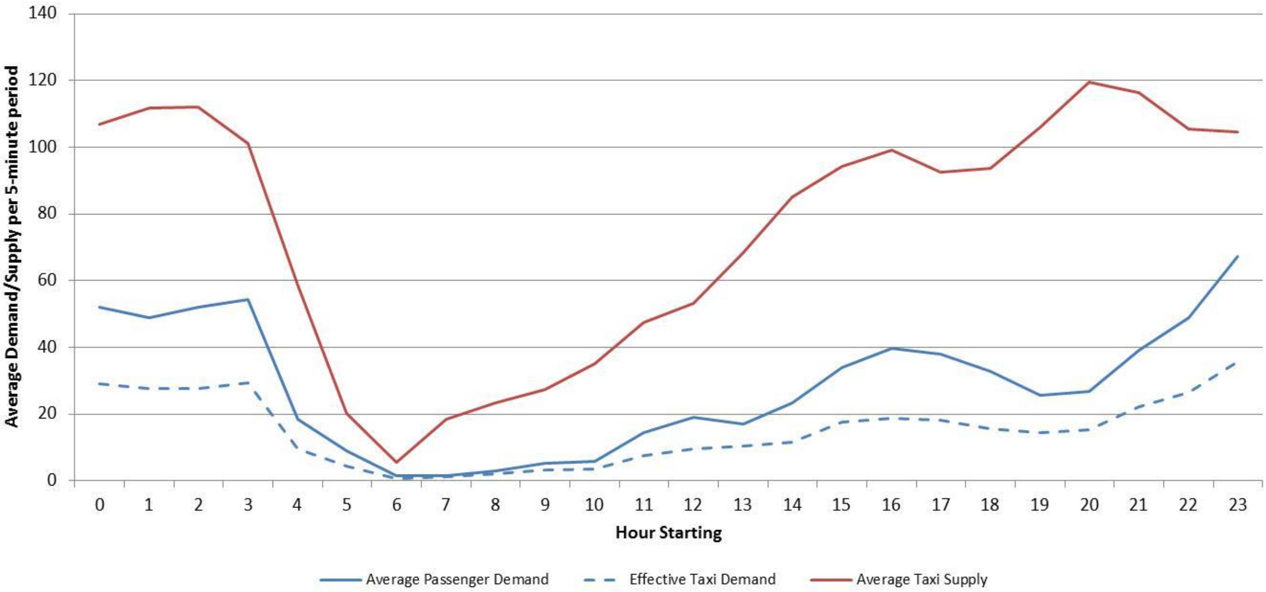
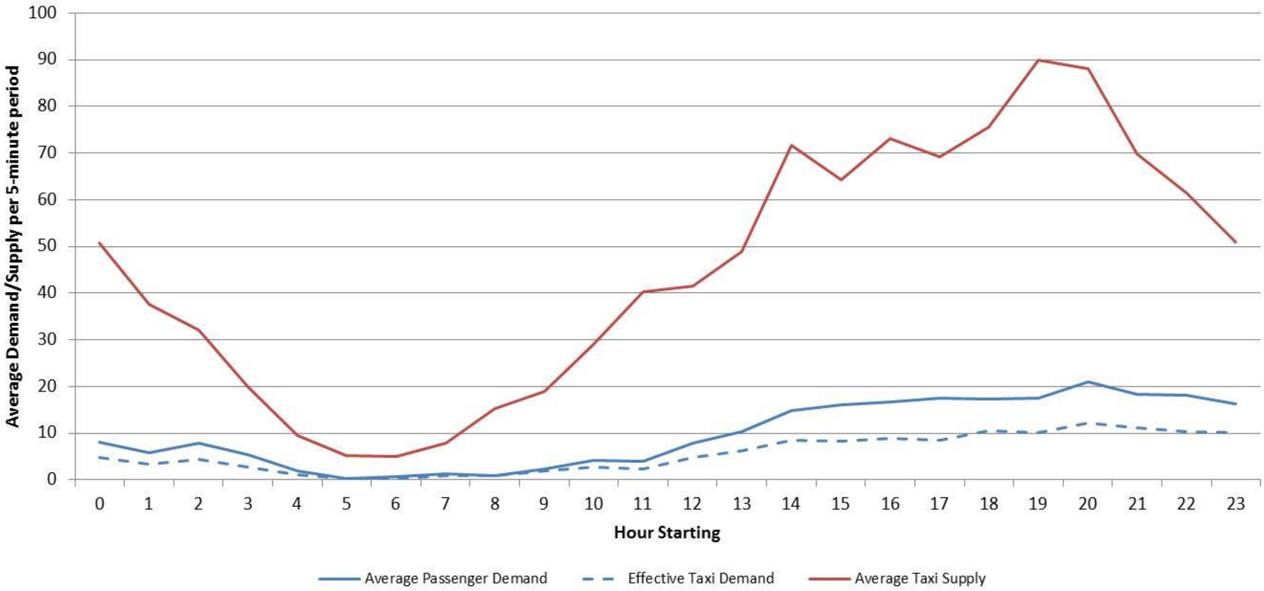


Figure 4.7
Comparison of Demand and Supply: Sunday



4.7.1 These graphs show that taxi supply follows the same pattern as passenger demand. However, it can clearly be seen that in all time periods, the supply of taxis significantly exceeds passenger demand and effective taxi demand.

4.8 Average Delay Calculations

4.8.1 As well as understanding the total demand for and supply of taxis, it is also important to investigate the average delay experienced by taxi passengers and drivers; that is, the average length of time that a passenger must wait before they are able to hire a taxi and the average length of time that a taxi driver must wait before getting a fare. The methodology for this has been set out in section 4.2. A comparison of the 2013 and 2016 results is provided in Section 7.2.

Average Passenger Delays

4.8.2 Using the data collected in the taxi rank observation surveys and the calculation methodology set out above, average passenger delays have been calculated for each taxi rank by day type (weekday, weekend and Sunday) and time period (AM peak, interpeak, PM peak and off-peak). Table 4.5 summarises the average passenger delay in seconds.

4.8.3 From this dataset it can be seen that the average delay time for passengers at taxi ranks across the city centre is generally less than 1 second, indicating that a taxi is usually immediately available in most locations. The longest wait time is at Sophia Gardens, where a passenger waits for 8.9 seconds on average. The Sophia Gardens rank serves the National Express coach stop and observations during the surveys show it has a unique behaviour. It is difficult to determine whether passengers waiting at this location have pre-booked a vehicle or not, and therefore sometimes are waiting for a specific vehicle. As taxi vehicles can be booked as PHVs it is then difficult to ascertain whether a passenger entering a 'taxi' has pre-booked the vehicle or not. There are also periods at this rank where a large number of passengers arrive on a coach at one time and the physical size of the rank (2-3 vehicles) limits the number of passengers that can be served within any one time period. It is therefore worth considering this rank in isolation. The longest delay experienced was in the Sunday AM period where passengers were waiting an average of 2 minutes, and the second longest delay was a weekday AM period with average waiting times of 48 seconds. All other day types and time periods had average delay times of less than 15 seconds, and the overall average passenger delay for Sophia Gardens is 8.9 seconds.

4.8.4 Considering all ranks apart from Sophia Gardens across all day types and time periods, there are few ranks with any passenger delay at all. Only four official ranks – Churchill Way, Mermaid Quay, Park Place and St Mary Street/Guildhall Place – and one unofficial rank on Greyfriars Road show any periods of passenger delay. The PM weekday period at Churchill Way show average delays of 30 seconds and the Sunday inter-peak period show average delays of 12.5 seconds. Churchill Way is a relatively busy rank, with taxis queueing for the vast majority of the surveyed periods. The weekday delay relates to one 5 minute period when no taxis were available and two individual 5 minute periods when passengers were still queueing due to insufficient taxis arriving to serve them, and the Sunday delay is due to two consecutive 5 minute periods where one passenger was waiting for a taxi to arrive. All other observed delays at ranks are for one time period only and are average delays of below 10 seconds, except for the unofficial rank of Greyfriars Road which has average delays of 11 seconds in the weekend off-peak morning time period. Yet even here this relates to one 5 minute period where an increase in passenger demand occurred.

Average Taxi Delay

4.8.5 As well as identifying the average passenger delay it is important to consider the taxi delay. Average taxi delays have been calculated for each taxi rank by day (weekday, weekend and Sunday) and time period (AM peak, interpeak, PM peak and off-peak). Table 4.6 shows the average waiting time for taxis.

4.8.6 This analysis indicates that the average delay for taxis is high, with the majority of drivers waiting over 5 minutes for a fare, and some delays in excess of 2 hours. The average delay on weekends and Sunday is over 8 minutes, with average delays of just over 7 and a half minutes at weekends. Delays are typically lower in the AM peak and the weekday off-peak morning periods, with the highest delays occurring during the interpeak and PM period, except for on the weekday day type where the off-peak night period has the highest delay.

4.8.7 The longest delays occurred at Saunders Road during the weekend off-peak morning period, with taxis waiting 35 minutes on average. During the weekday and Sunday day types, the maximum waiting times were at Heath Hospital where there was an average waiting time of over 24 minutes and over 27 minutes respectively. Taxis at Heath Hospital tended to wait longer than at the other taxi ranks, with drivers estimated to wait more than 15 minutes between fares. The Saunders Road rank had taxi delays of just over 12 and a half minutes, and taxis at Sophia Gardens waited just under 12 and a half minutes on average.

Table 4.5
Average Passenger Delay (seconds)

Location	Weekday						Weekend						Sunday						Overall
	AM	IP	PM	OPN	OPM	Daily	AM	IP	PM	OPN	OPM	Daily	AM	IP	PM	OPN	OPM	Daily	
Albert Street	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Churchill way	0.0	0.0	29.9	0.0	0.0	3.7	0.0	3.1	0.0	0.0	0.0	0.8	0.0	12.5	0.0	0.0	0.0	3.1	**2.6**
Greyfriars Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Havelock Street	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Heath Hospital	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0		0.0	**0.0**
Lower St Mary Street (East)	0.0	0.0	0.0	0.0	0.0	0.0				0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Lower St Mary Street (West)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Mermaid Quay	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.0	0.0	0.0	0.8	**0.3**
Mill Lane (South)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Park Place	4.2	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Saunders Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
St Mary Street/Guildhall Place	0.0	0.0	0.0	0.0	0.0	0.0	5.4	5.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	**0.6**
Tredegar Street	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Duke Street/ Castle Street										0.0	0.0	0.0							**0.0**
Greyfriars Road (Unofficial)										0.0	11.1	7.6							**7.6**
Sophia Gardens	48.3	0.0	0.0	0.0	3.6	7.1	0.0	13.6	0.0	0.0	0.0	3.4	120.8	4.2	0.0	0.0	0.0	16.1	**8.9**
St Mary Street (O'Neills)			0.0	0.0	0.0	0.0				0.0	0.0	0.0							**0.0**
Wood Street			0.0			0.0				0.0	0.0	0.0							**0.0**
Grand Total	**3.5**	**0.0**	**1.9**	**0.0**	**0.3**	**0.8**	**0.4**	**1.7**	**0.0**	**0.0**	**0.3**	**0.5**	**8.6**	**1.4**	**0.0**	**0.0**	**0.0**	**1.5**	**0.9**

Table 4.6
Average Taxi Delay (minutes)

Location	Weekday						Weekend						Sunday						Overall
	AM	IP	PM	OPN	OPM	Daily	AM	IP	PM	OPN	OPM	Daily	AM	IP	PM	OPN	OPM	Daily	
Albert Street	7.4	9.8	13.5	6.5	1.6	6.9	10.8	7.0	6.9	4.9	2.7	5.8	9.7	8.9	10.0	6.6	0.3	6.1	**6.3**
Churchill way	13.3	8.8	3.9	9.7	6.9	8.4	11.8	6.9	7.6	10.9	7.1	8.5	5.3	10.0	11.3	9.0	19.8	12.2	**9.7**
Greyfriars Road	4.4	10.3	9.7	16.0	7.3	9.8	2.4	8.9	8.5	4.5	6.5	6.4	6.2	11.4	8.9	10.4	9.7	9.7	**8.6**
Havelock Street	0.0	1.3	6.8	0.1	2.7	2.0	0.1	8.4	0.0	1.8	1.7	3.1	0.1	8.8	0.0	1.4	0.0	2.5	**2.5**
Heath Hospital	11.5	15.8	12.4	24.3		16.5	13.9	14.2	12.3	11.7		13.2	13.1	20.5	27.4	8.8		17.5	**15.7**
Lower St Mary Street (East)	0.0	0.0	0.0	0.5	0.1	0.1				0.0	6.2	3.2	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**
Lower St Mary Street (West)	0.1	6.8	8.0	9.0	14.2	8.7	15.6	4.8	1.3	27.4	13.3	11.4	1.4	10.5	12.2	14.5	19.1	12.9	**11.0**
Mermaid Quay	2.0	10.9	6.6	7.3	6.4	7.2	3.9	7.0	7.0	3.9	11.2	7.2	3.6	10.3	11.9	8.6	5.3	7.9	**7.4**
Mill Lane (South)	15.5	13.2	14.9	12.4	9.0	12.3	7.7	11.3	9.1	8.0	3.2	7.5	2.3	11.8	9.2	10.6	14.9	10.9	**10.3**
Park Place	12.8	12.8	11.3	9.3	6.9	10.1	10.0	11.1	11.5	9.1	4.2	8.6	6.9	15.0	9.8	15.9		12.7	**10.2**
Saunders Road	7.0	10.1	10.4	9.2	8.1	9.0	18.5	13.2	16.4	8.2	35.0	19.6	14.9	12.8	10.0	9.4	3.1	9.2	**12.6**
St Mary Street/Guildhall Place	4.2	9.2	11.1	11.6	5.7	8.3	13.1	11.0	13.7	10.4	13.9	12.3	6.3	12.2	14.8	15.9	10.7	12.1	**10.9**
Tredegar Street	0.0	9.2	0.0	0.1	0.0	2.3	0.0	2.8	4.6	2.5	0.3	1.9	0.0	4.3	6.3	7.3	0.4	3.5	**2.6**
Duke Street/ Castle Street										4.5	8.5	7.3							**7.3**
Greyfriars Road (Unofficial)										4.0	4.2	4.2							**4.2**
Sophia Gardens	1.2	4.9	8.4	19.7	14.0	10.6	0.5	5.3	11.5	11.6	13.5	9.2	0.4	13.0	14.1	13.4	31.3	17.0	**12.3**
St Mary Street (O'Neills)			0.5	9.2	11.3	9.5				0.9	4.5	3.2							**7.5**
Wood Street			0.0			0.0				6.9	2.1	4.5							**4.4**
Grand Total	**5.3**	**8.2**	**7.6**	**9.5**	**6.7**	**7.6**	**8.3**	**8.6**	**8.7**	**7.4**	**8.5**	**8.3**	**5.0**	**10.7**	**10.4**	**9.3**	**9.5**	**9.3**	**8.4**

5 Results of Public Attitude Surveys

5 Results of Public Attitude Surveys

5.1 Survey Response

5.1.1 A public attitude interview survey has been carried out with the aim of collecting information to supplement the taxi rank surveys. In particular, the public attitude survey allowed an assessment of frequency of licensed vehicle use, passenger delays for all methods of hire (flag down, telephone and rank), passenger satisfaction with the service they received and general attitudes to the use of both taxis and private hire vehicles in Cardiff.

5.1.2 The survey was structured into three parts. The first part obtained information about the individual completing the questionnaire. The second part sought information about people's understanding of the differences between taxis and private hire vehicles and information about their last trip. The third part addressed more general information about people's usual use and recorded views on improvements and safety.

5.1.3 It should be noted that although 733 interviews were completed in total, in the tables that follow the totals do not always add up to 733. This is due to one of three reasons; first, not all respondents were required to answer all questions; second, some respondents failed to answer some questions that were asked; and third, some questions allowed multiple responses. Where the latter case applies this will be highlighted in the title of the table.

5.2 Survey Administration

5.2.1 A total of 733 interviews were carried out between May and August 2016. The survey sample and 2011 census results for Cardiff are summarised in Table 5.1 below.

Table 5.1
Survey Sample and 2011 Census by Age and Sex

Category	2011 Census	Actual Sample	
	Percent	Frequency	Percent
16 – 34	40.7%	259	35.3%
35 – 64	43.1%	313	42.7%
65+	16.3%	120	16.4%
No Answer	-	41	5.6%
Total	**100.0%**	**733**	**100.0%**
Male	48.8%	299	40.8%
Female	51.2%	409	55.8%
No Answer	-	25	3.4%
Total	**100.0%**	**733**	**100.0%**

5.2.2 Table 5.1 demonstrates that the age structure of the sample conforms relatively well to the 2011 Census, although the 16-34 age group has been slightly under-sampled. The mix of male and female respondents is broadly similar to the 2011 Census with the majority of respondents being female, however the proportion of males interviewed is below the proportion recorded in the 2011 Census.

5.2.3 A set target quota was not used because, as Table 5.3 below shows, the survey captured the views of visitors as well as Cardiff residents and so it may not be representative to match the 2011 Census demographics exactly.

5.2.4 Cardiff Council's Access Group received copies of the public attitude survey, and the 11 responses received have been combined with the wider public attitude survey.

5.2.5 The remainder of the survey results are reported below. For the purposes of clarity, the word 'licensed vehicle' is used when the responses refer to both taxis and private hire vehicles. Where the responses relate specifically to taxis or private hire vehicles, this will be clearly stated.

5.3 Economic and Residency Status

5.3.1 The economic status of respondents is given in Table 5.2. Approximately 38% of 2016 respondents were in full-time employment and nearly 20% were in part time employment. Approximately one in twenty people are not in employment with a further 10% being students. Over 18% of the respondents were retired.

Table 5.2
Economic Status of Respondents

Status	Raw Data	
	Frequency	Percent
Full time	278	37.9%
Part time	143	19.5%
Student	73	10.0%
Retired	135	18.4%
Unemployed	34	4.6%
No answer	70	9.5%
Total	**733**	**100.0%**

5.3.2 Table 5.3 indicates the residency status of respondents. The majority of people (49%) who took part live within Cardiff, however, a substantial number of respondents came from outside of Cardiff (34%). Nearly 10% of respondents were tourists.

Table 5.3
Residency Status of Respondents

Status	Raw Data	
	Frequency	Percent
Cardiff	356	48.6%
Not Cardiff	251	34.2%
Tourist	71	9.7%
No Answer	55	7.5%
Total	**733**	**100.0%**

5.4 Understanding of Licensed Vehicle Flagging and Rank Waiting

5.4.1 Respondents were asked if they had given up trying to flag down or wait at a rank for a taxi in the last 3 months. The results show a vast majority (70%) said no, but a significant percentage (28%) said yes with the remaining respondents giving no answer.

5.4.2 The 204 Respondents who indicated that they had given up trying to flag down or waiting for a taxi were asked, 'If yes, what was your reason for giving up?' with a combination of closed and open responses; the results are shown in Table 5.4. Just under 44% of respondents who gave up attributed their reason to lack of taxis and another 21% suggest they were refused a fare within Cardiff. No answer to the question was provided by 21% of respondents, and 12% stated the taxi had already been booked. The 'Other' box was filled in by 16% of respondents, with the most significant reply of 'length of journey too short' at 3.4%, followed by driver competency (2.9%) and too expensive (2.5%). Respondents who gave both a closed response and an open response had both their answers considered, unless the open response reiterated the closed.

Table 5.4
Reasons for Giving Up Waiting[5]

Reason	Raw Data	
	Frequency	Percent
Lack of taxis	89	43.6%
Taxi already booked	25	12.3%
Driver refusal to use meter (within Cardiff)	3	1.5%
Driver refusal to use meter (outside Cardiff)	4	2.0%
Refusal of fare (outside Cardiff)	14	6.9%
Refusal of fare (within Cardiff)	43	21.1%
No Answer	43	21.1%
Other: Length of Journey - Too short	7	3.4%
Other: Driver competency	6	2.9%
Other: Too expensive	5	2.5%
Other: Disabled accessibility	3	1.5%
Other: Language Barrier	3	1.5%
Other: Driver didn't want to leave rank	2	1.0%
Other: Potential Passenger Ignored	2	1.0%
Other: Booked another vehicle	1	0.5%
Other: Elderly accessibility	1	0.5%
Other: Length of Journey - Too Long	1	0.5%
Other: Used personal vehicle	1	0.5%
Other: Vehicle Malfunction	1	0.5%
Total	**221**	**108.3%**

5.4.3 Respondents were then asked if they thought all licensed vehicles (i.e. taxis and private hire vehicles) are allowed to pick up from ranks or be flagged down. While a majority of almost 52% said no, just under a third answered yes and the remaining 18% declined to answer. This indicates there is a general lack of understanding of the difference between taxis and private hire vehicles and restrictions on their operations.

5.5 Recent Journeys

5.5.1 Respondents were each asked if they had made a journey by licensed vehicle in the Cardiff area in the last month. The survey showed around 41% of respondents had made a recent journey and 59% had not. 2 of the 733 respondents (0.3%) did not answer this question.

5.5.2 Those respondents who indicated that they had made a recent journey by licensed vehicle, were then questioned about their last trip in terms of the following;

- Type of licensed vehicle (i.e. taxi or private hire vehicle);
- Wheelchair accessibility;
- Journey purpose;
- Time of Travel;
- Cost; and

[5] The table adds up to greater than 100% as some respondents gave more than one answer

- Standard of Service (e.g. Vehicle Quality, Driver Quality, Price and Waiting Time).

5.5.3 A number of respondents answered no to the initial question, and yet continued to answer the questions relating to this last trip. These results have been removed from the analysis.

Type of Licensed Vehicle

5.5.4 The type of licensed vehicle used on the respondents' last trip is shown in Table 5.5 below. The split using taxis and PHVs is similar with 36% using a taxi for their previous journey and 41% using PHVs. However, 8% of people didn't know which type they used, and nearly 11% were unaware of the difference between a taxi and private hire vehicle.

Table 5.5
Licensed Vehicle Type for Last Trip

Licensed Vehicle Type	Raw Data	
	Frequency	**Percent**
Taxi	107	35.7%
PHV	122	40.7%
Don't know	25	8.3%
Unaware of difference	32	10.7%
No Answer	14	4.7%
Total	**300**	**100.0%**

Wheelchair Accessibility

5.5.5 Respondents were asked if the vehicle they hired was wheelchair accessible or not. Results from respondents who replied to this question indicate that less than a quarter said it was, and 47% said it wasn't. However 21% said they did not know.

5.5.6 Approximately 60% of taxis in Cardiff are currently wheelchair accessible. The survey results recorded a lower percentage of wheelchair accessible vehicles, however this is to be expected as fewer private hire vehicles are wheelchair accessible and as this is not a primary concern for many licensed vehicle users they may not notice whether the vehicle they are using is equipped for wheelchair use.

Trip Purpose

5.5.7 The journey purpose of respondents is summarised in Table 5.6 below. The most common journey purpose across Cardiff was leisure trips, accounting for almost half of all journeys. 'Shopping' was the next most popular journey purpose, accounting for almost one in 6 journeys with a similar proportion – one in 7 journeys – being made for business purposes. Other trip purposes, such as 'education' and 'medical', accounted for the remaining 15% of trips, with 6% not giving an answer.

Table 5.6
Trip Purpose for Last Licensed vehicle Trip

Licensed Vehicle Type	Raw Data	
	Frequency	Percent
Leisure	149	49.7%
Shopping	46	15.3%
Work	42	14.0%
Medical	11	3.7%
Education	11	3.7%
Other	22	7.3%
No Answer	19	6.3%
Total	**300**	**100.0%**

Time of Trip

5.5.8 Respondents were also asked about the day and time of their trip, with the results summarised in Table 5.7 below. Some respondents filled out either the day of the trip or the time of their trip – these have been placed in the 'Unspecified' rows and columns respectively.

5.5.9 The results indicate that respondent's last trips were staggered across a number of time periods and days. The most trips were undertaken during the weekday interpeak time period (10:00 – 15:59) with the Weekday AM period also showing a high response. Saturday off-peak (19:00 - 06:59) had the next largest response. By far the fewest trips were undertaken on a Sunday, where the highest activity recorded is in the off-peak time. These patterns are broadly consistent with the passenger demand profiles recorded during the taxi rank observations, although weekday PM and off-peak is slightly underrepresented.

Table 5.7
Time of Last licensed Vehicle Trip

Day	Raw Data				
	Frequency by time Period				
	AM	IP	PM	OP	Unspecified
Weekday	39	49	10	15	9
Friday	10	23	14	22	4
Saturday	1	16	23	33	5
Sunday	1	3	2	6	2
Unspecified	2	1	0	6	0

Trip Cost

5.5.10 Respondents who had made a recent journey were asked to provide information about the approximate fare they paid. Respondents who gave wide brackets for estimation of their trip costs which overlapped several cost brackets defined in the question were dismissed here. Table 5.8 below indicates the distribution of trip costs.

5.5.11 The price bracket £9.01 and £10.00 accounts for 12% of respondents which was the highest percentage, with shouldering brackets relatively high also. Very few journeys cost £5 or less (4.3%) with almost 15% of trips costing more than £15.

Table 5.8
Cost of Last Licensed Vehicle Trip

Licensed Vehicle Type	Raw Data	
	Frequency	**Percent**
£0.01 - £1.00	0	0.0%
£1.01 - £2.00	0	0.0%
£2.01 - £3.00	4	1.3%
£3.01 - £4.00	2	0.7%
£4.01 - £5.00	7	2.3%
£5.01 - £6.00	11	3.7%
£6.01 - £7.00	20	6.7%
£7.01 - £8.00	21	7.0%
£8.01 - £9.00	19	6.3%
£9.01 - £10.00	35	11.7%
£10.01 - £12.50	24	8.0%
£12.51 - £15.00	21	7.0%
£15.01 - £17.50	9	3.0%
£17.51 - £20.00	12	4.0%
£20.01 - £30.00	14	4.7%
£30.01 - £100.00	9	3.0%
Don't know	23	7.7%
Other	3	1.0%
No Answer	66	22.0%
Total	**300**	**100.0%**

5.5.12 Further analysis has been undertaken to examine journey costs by time of day and day of week. Table 5.9 summarises the results from average trip cost by time of day.

Table 5.9
Average Trip Cost by Time of Day

Day	Average Frequency by time Period					
	AM	**IP**	**PM**	**OP**	**Unspecified**	**Average**
Weekday	£10.62	£9.34	£9.81	£10.72	£15.27	**£10.44**
Friday	£8.66	£10.03	£17.62	£10.46	£10.25	**£11.39**
Saturday		£16.48	£12.82	£19.26	£12.50	**£16.80**
Sunday	£23.00	£10.00	£14.40	£11.40	£9.00	**£12.60**
Unspecified	£8.00	£10.00		£36.67		**£22.67**
Average	**£10.41**	**£10.59**	**£13.80**	**£15.98**	**£12.93**	**£12.71**

5.5.13 The highest average cost is Sunday AM although there was only one person surveyed with this fare and therefore it isn't necessarily representative of costs within this time period. A high cost with a proportionally representative sample size is Saturday off-peak period, with the average cost being £19.26. Similarly high average costs are for present for PM Friday (£17.62) and interpeak Saturday (£16.48). Both periods have low sample sizes and contain outliers – £53.70 for Friday and £57.70 for Saturday – and therefore may not be representative of this period. The lowest average journey cost was found during the weekday with the cost at £10.44. Saturday was found to be the most expensive day with average costs at £16.80.

5.5.14 Overall, the findings show that average journey costs on Weekdays, Fridays and Sundays are similar, with only Saturdays noticeably higher. There is relatively little variation between all time periods, except off-peak (19:00-06:59) which is generally the more expensive period.

Rate Standards on Last Trip

5.5.15 Finally, respondents were asked to rate the standard of service they received, considering issues such as vehicle quality, driver quality, price and waiting time for their last trip. The results have been analysed according to whether the respondent indicated that the journey was made by taxi, private hire vehicle, or that they didn't know/were unaware of the difference. The results are summarised in Tables 5.10 to 5.13 below.

Table 5.10
Standard of Service on Last Trip: Vehicle Quality

Type of Licensed Vehicle	Number of Answers	Vehicle Quality					
		Very Good	**Good**	**Average**	**Poor**	**Very Poor**	**Total**
Taxi	107	11.2%	39.3%	37.4%	7.5%	0.0%	**95.3%**
Private Hire Vehicle	122	15.6%	46.7%	32.0%	1.6%	0.0%	**95.9%**
Unaware of Difference	32	3.1%	28.1%	56.3%	12.5%	0.0%	**100.0%**
Don't Know/No Answer	39	20.5%	35.9%	33.3%	0.0%	0.0%	**89.7%**
Total	**300**	**13.3%**	**40.7%**	**37.7%**	**4.7%**	**0.0%**	**96.3%**

Table 5.11
Standard of Service on Last Trip: Driver Quality

Type of Licensed Vehicle	Number of Answers	Driver Quality					
		Very Good	Good	Average	Poor	Very Poor	Total
Taxi	107	13.1%	35.5%	40.2%	8.4%	0.9%	**98.1%**
Private Hire Vehicle	122	19.7%	44.3%	26.2%	4.9%	0.8%	**95.9%**
Unaware of Difference	32	3.1%	21.9%	56.3%	18.8%	0.0%	**100.0%**
Don't Know/No Answer	39	23.1%	30.8%	28.2%	5.1%	2.6%	**89.7%**
Total	**300**	**16.0%**	**37.0%**	**35.3%**	**8.0%**	**1.0%**	**97.3%**

Table 5.12
Standard of Service on Last Trip: Price

Type of Licensed Vehicle	Number of Answers	Price					
		Very Good	Good	Average	Poor	Very Poor	Total
Taxi	107	6.5%	25.2%	41.1%	18.7%	2.8%	**94.4%**
Private Hire Vehicle	122	6.6%	27.9%	45.9%	12.3%	2.5%	**95.1%**
Unaware of Difference	32	3.1%	15.6%	62.5%	12.5%	6.3%	**100.0%**
Don't Know/No Answer	39	20.5%	17.9%	38.5%	10.3%	2.6%	**89.7%**
Total	**300**	**8.0%**	**24.3%**	**46.0%**	**14.3%**	**3.0%**	**95.7%**

Table 5.13
Standard of Service on Last Trip: Waiting Time

Type of Licensed Vehicle	Number of Answers	Waiting Time					
		Very Good	Good	Average	Poor	Very Poor	Total
Taxi	107	14.0%	30.8%	35.5%	11.2%	3.7%	**95.3%**
Private Hire Vehicle	122	16.4%	43.4%	32.0%	4.1%	0.8%	**96.7%**
Unaware of Difference	32	3.1%	18.8%	53.1%	18.8%	0.0%	**93.8%**
Don't Know/No Answer	39	20.5%	30.8%	28.2%	5.1%	2.6%	**87.2%**
Total	**300**	**14.7%**	**34.7%**	**35.7%**	**8.7%**	**2.0%**	**95.7%**

5.5.16 It is clear that there are few Poor/Very Poor ratings across each of the four categories in the question; All service categories have 10% or lower Poor/Very Poor ratings except for on price which had the Poor rating under 15%. The majority of respondents considered vehicle quality, driver quality and waiting time to be Good or Very Good and the large proportion of respondents think the price is Good or Average. In all cases, the level of service received when using private hire vehicles was considered better than the level of service when using taxis, although price showed very little difference between the two. Overall the results give a positive view of the standard of service for licensed vehicles in Cardiff.

5.5.17 Respondents were asked to give the reasons for any Poor/Very Poor ratings. Responses were considered if they contained at least one Poor/Very Poor rating in any service category and also gave a reason. The most frequent reason was high costs, with 66% of the 50 who answered giving this response. The second highest rated response was long waiting times at 30%. Other reasons given were poor customer service (16%), bad driver competency (12%), vehicle upkeep, unfair meter usage and a lack of spoken English by the driver. Percentages are considered in relation to the number of responses as some respondents had several reasons for giving a poor rating.

5.6 General Patterns of Licensed Vehicle Use

5.6.1 Whilst the first part of the survey was aimed at those people who recently used licensed vehicle services, the second part asked everyone who took part in the survey how often they used services in order to build up a picture of general attitudes to travel in Cardiff. The results of this section are summarised below.

Frequency of Licensed Vehicle Use

5.6.2 Firstly, respondents were asked to indicate how frequently they used licensed vehicles and by what type they usually hired. The results are summarised in Table 5.14.

5.6.3 In terms of frequency of hire, there is a relatively even distribution between taxi and private hire vehicles, with most people using licensed vehicles rarely. Around 7% of respondents use taxis or private hire vehicles on a weekly basis, while less than 2.5% of respondents use licensed vehicles every day. Those who did not know the difference between licensed vehicle types generally used them infrequently or never, which may explain why they do not know the difference.

Table 5.14
Frequency of Licensed Vehicle Use by Type

Time	Taxi		PHV		Unknown	
	Frequency	%	Frequency	%	Frequency	%
Daily	11	2.3%	11	2.1%	2	1.4%
Weekly	43	9.1%	29	5.5%	2	1.4%
Monthly	70	14.8%	75	14.2%	12	8.1%
Yearly	27	5.7%	33	6.3%	5	3.4%
Rarely	200	42.4%	209	39.7%	55	37.2%
Never	121	25.6%	170	32.3%	72	48.6%
Total	**472**	**100.0%**	**527**	**100.0%**	**148**	**100.0%**

Method of Hire

5.6.4 The method of hire usually used was assessed against the type of licensed vehicle. The results are shown below in Table 5.15.

5.6.5 The results imply a misunderstanding of taxi and private hire vehicles with 50% of respondents saying they booked a taxi via phone, although the confusion could arise from the ability of taxi vehicle to be used as PHVs. A small percentage of respondents implied they hired a PHV at a rank or by flagging it down, which is an illegal activity. The most frequent way of hiring a licensed vehicle was by phone, with 88% of PHVs being hired this way.

Table 5.15
Usual Method of Hire by Vehicle Type

Method of Hire	Taxi		PHV		Unknown	
	Frequency	%	Frequency	%	Frequency	%
Rank	49	19.8%	8	3.0%	5	7.6%
Flagged	57	23.0%	11	4.1%	4	6.1%
Phone	124	50.0%	236	88.4%	42	63.6%
Other	18	7.3%	12	4.5%	15	22.7%
Total	**248**	**100.0%**	**267**	**100.0%**	**66**	**100.0%**

Reasons for not using licensed vehicles more regularly

5.6.6 Those people who indicated that they only used licensed vehicles rarely or never were asked to provide reasons for not using them more frequently. The most popular responses are summarised in Table 5.16 below.

5.6.7 The most common reason for not using licensed vehicles is the availability of other modes of transport, with many respondents preferring to use their car or travel by public transport. This may in part be due to the relative costs of these modes compared to licensed vehicles, but may also reflect the greater convenience of car. Nearly 16% of respondents cited cost as a key reason for not using licensed vehicles, while just fewer than 7% indicated they had no need to use them. Poor customer service was the next notable reason at just under 2%.

Table 5.16
Reasons for not using Licensed Vehicles more often

Reason	Frequency	Percent
Use/would rather use other modes	272	37.1%
Cost	115	15.7%
No need	50	6.8%
Infrequent Visitor	27	3.7%
Customer Service	13	1.8%
Personal safety	12	1.6%
Bad reputation	10	1.4%
Availability	9	1.2%
Not Convenient	9	1.2%
Professional Negligence	8	1.1%
Unspecified Dislike	6	0.8%
Lack of Fitness benefits	3	0.4%
Driving Standards	2	0.3%
Reliability	1	0.1%
Other	7	1.0%
No Answer	189	25.8%
Total	**733**	**100.0%**

Licensed Vehicle Safety in Cardiff

5.6.8 Respondents were asked whether they feel safe using licensed vehicles in Cardiff, and the majority (57%) said yes they did. Fewer than 29% of respondents said they didn't feel safe, and 14% didn't answer the question. Those who didn't feel safe were asked to give the ways that safety could be improved. The results are shown below in Table 5.17.

5.6.9 The highest ranked improvement was to have a greater police presence at ranks and patrolling popular pick up areas at 14%. The requirement for safe areas of operation for customers is supported by the third and fourth highest responses, safer ranks / places to wait and improved driver checks / easier identification which gathered over 6% of responses each. Over 1 in 10 respondents believe that an improved level of customer service is required to help them feel safer - the second highest improvement. Other popular improvements included improved language skills and driver competency. Of those who said they did not feel safe 30% did not suggest any improvements.

Table 5.17
Suggested Improvements to Licensed Vehicle Safety

Improvement	Frequency	Percentage
More Stationed & Patrolling Police	29	13.7%
Improved Customer Service	24	11.4%
Safer Ranks / Places to Wait	14	6.6%
Better Driver Checks in Place / Easy Identification	13	6.2%
Improved Language Skills	13	6.2%
Improved Driver Competency	12	5.7%
CCTV	9	4.3%
Improved Reputation	5	2.4%
More Female Drivers	4	1.9%
Improved Car Quality	3	1.4%
Improved Route Choice	3	1.4%
Better Driver Training / Driving Enforcement	2	0.9%
Appropriately Presented Drivers	1	0.5%
Don't Know	7	3.3%
Other	33	15.6%
No response	63	29.9%
Total	**235**	**111.4%**

Percentages are in relation to the number of people who responded 'No' to the previous questions on safety

5.7 Consumer Knowledge of Taxi Fares

5.7.1 In order to gauge people's understanding of taxi fares, respondents were asked to estimate the cost of a three mile daytime journey in the Cardiff area. The actual cost should be £7.50 by distance, although this will vary due to traffic delays and the time of day (refer to paragraph 2.1.9 and the Cardiff taxi tariff in Table 2.4). A summary of the results is shown in Table 5.18.

5.7.2 Just under half the respondents thought the cost was between £4 and £9, with £4-5 being the most common response. Approximately one in five thought the cost would be greater than £9 and nearly one in ten thought the cost was less than £4. The number of respondents who didn't know the cost, or didn't answer was 27%. The responses indicate a high level of uncertainty regarding taxi fares in Cardiff.

Table 5.18
Estimated Cost of a 3 mile Taxi Journey

Improvement	Frequency	Percentage
£0.01 - £1.00	1	0.1%
£1.01 - £2.00	1	0.1%
£2.01 - £3.00	13	1.8%
£3.01 - £4.00	54	7.4%
£4.01 - £5.00	97	13.2%
£5.01 - £6.00	77	10.5%
£6.01 - £7.00	68	9.3%
£7.01 - £8.00	72	9.8%
£8.01 - £9.00	24	3.3%
£9.01 - £10.00	69	9.4%
£10.01 - £12.50	21	2.9%
£12.51 - £15.00	24	3.3%
£15.01 - £17.50	3	0.4%
£17.51 - £20.00	13	1.8%
£20.01 - £30.00	1	0.1%
£30.01 - £100.00	1	0.1%
Don't Know / Other	35	4.8%
No answer	163	22.2%
Total	**733**	**100.00%**

Taxi Availability

5.7.3 Since the 2010 study a moratorium on licences has been in place. To see if the public had noticed an adverse effect on the availability of taxis, respondents were asked whether they thought there are a sufficient number of taxis in Cardiff. Table 5.19 summarises the results, which show a fairly even split between yes (36%) and don't know (44%), with fewer than one in ten suggesting there are not enough taxis in Cardiff.

Table 5.19
Availability of taxis in Cardiff

Response	Raw Data	
	Frequency	**Percent**
Sufficient	265	36.2%
Insufficient	57	7.8%
Don't know	324	44.2%
No answer	87	11.9%
Total	**733**	**100.0%**

Potential for Improvement

5.7.4 All respondents, regardless of frequency of use, were asked to suggest ways of improving the licensed vehicle services in Cardiff. Table 5.20 summarises respondents' suggestions for improving services in order of popularity.

Table 5.20
Suggested Improvements to Taxi Service[6]

Improvement	Frequency	Percentage
Improve customer service: Drivers	69	9.4%
Reduce fares	24	3.3%
Improve driver training/road knowledge	18	2.5%
Improved rank & taxi monitoring	16	2.2%
Improve cleanliness of vehicles	15	2.0%
Clearer / consistent pricing	13	1.8%
Improve standard of vehicles	11	1.5%
Stop unfounded driver refusal	10	1.4%
Increase number of taxis	7	1.0%
Improve driver language skills	7	1.0%
More access friendly vehicles within fleet	6	0.8%
Improve enforcement / control of licences	5	0.7%
Reduce number of taxis	4	0.5%
More efficient	4	0.5%
Improve reliability	4	0.5%
Improve availability	3	0.4%
Increase number of / improve taxi ranks	3	0.4%
More readily available away from the city centre	3	0.4%
Improve information / advertising	2	0.3%
Improve reputation	2	0.3%
Improve customer service: Other	1	0.1%
Other	6	0.8%
No answer	515	70.3%
Total	**748**	**102.0%**

5.7.5 The most popular improvement cited by respondents referred to improved customer service from the driver with over 9% of the result. The majority of comments pertain to key driver competencies and if combined would be the most popular improvement with 'Improved Driver Training / Knowledge', 'Stop Unfounded Refusals' and 'Improve Driver Language Skills' collectively making up 5% of respondents. The second highest improvement noted was reducing fares, with having clearer and consistent pricing also noted as a key improvement (2%). Over 70% of people did not respond to this question.

5.7.6 A small proportion of respondents seem to be weary and unsure of the taxi services provided in Cardiff. Common patterns which appear to run through respondent's answers pertain to improving rank and taxi monitoring as a high priority improvement, as well as improved standard of vehicles and level of enforcement, which combined represent just over than 4% of respondents.

[6] The table adds up to greater than 100% as some respondents indicated they would like to see more than one improvement.

Suggested Locations for New Taxi Ranks

5.7.7 Respondents were also asked to indicate where, if any, they would they like to see new taxi ranks positioned. The results are summarised in Table 5.21 below.

Table 5.21
Suggested Locations for New Ranks[7]

Location	Frequency	Percentage
Outside the City Centre	31	4.2%
Shops & Supermarkets (within Cardiff)	25	3.4%
Cardiff Bay	17	2.3%
Within the City Centre	14	1.9%
Railway Station	9	1.2%
Castle	8	1.1%
Retail Parks / Larger Stores	8	1.1%
Shops & Supermarkets (Outside of Cardiff)	7	1.0%
Other (Within Cardiff)	7	1.0%
Student Area (Campus, Union, Schools etc)	6	0.8%
Everywhere	5	0.7%
Mill Lane / The Hayes / St David's Hall	5	0.7%
Newport Road	5	0.7%
Other (Outside of Cardiff)	5	0.7%
Westgate Street / Principality stadium	3	0.4%
New Bus Station	2	0.3%
Park Place / Civic Centre	2	0.3%
Don't know	7	1.0%
None needed	14	1.9%
No Answer	565	77.1%
Total	**745**	**101.6%**

5.7.8 Only 13% of respondents answered this question, with the majority suggesting broad areas of coverage rather than specific rank locations. The most popular location excluding these general responses was Cardiff Bay with over 2% of respondents suggesting this as a location for new taxi ranks. The railway station and the Castle are also suggested by 1% of respondents each. A number other specific locations were suggested but there was not a general consensus over these locations with each location named by less than 1% of respondents.

[7] The table adds up to greater than 100% as some respondents indicated they would like to see new taxi ranks in multiple locations.

6 Analysis of Current Market Conditions

6 Current Market Conditions

6.1 Significant Unmet Demand

6.1.1 The legislation with regard to the control of the number of taxi (hackney carriage) licences is set out in The Transport Act 1985. The Act states that *"the grant of a [hackney carriage] licence may be refused, for the purposes of limiting the number of hackney carriages in respect of which licences are granted, if, but only if, the person authorised to grant licences is satisfied that there is no significant demand for the services of hackney carriages (within the area to which the licence would apply) which is unmet"*.[8]

6.1.2 The term 'significant unmet demand' is not defined; the interpretation therefore differs from authority to authority and study to study. One option is to define a threshold for passenger queues at taxi ranks, with 'unmet demand' deemed to have occurred when the threshold is exceeded. While this approach is relatively simple to apply, it will not reliably determine market conditions when there is significant variability in the level of activity at individual ranks. For example, if the queue threshold is set too low, the queue of passengers at busy taxi ranks may regularly exceed the threshold, indicating the presence of unmet demand, even though individual passengers experience little or no delay in practice. Conversely, if the queue threshold is set too high, the queue of passengers at quieter taxi ranks may never exceed the threshold, indicating that there is not an excess demand, even though individual passengers may experience unacceptably long delays.

6.1.3 A better measure of the existence of unmet demand is to consider average passenger delay; the length of time that an individual passenger will wait on average before they are able to hire a taxi. However, this must also be considered in the context of the average taxi delay – the length of time that a driver must wait on average before getting a fare – before the potential presence of unmet demand can be identified. It is this latter approach that has been adopted for this study.

6.1.4 Once the presence of unmet demand has been determined, further assessment is required to determine whether it is significant or not. This assessment includes consideration of the duration for which there is unmet demand and the time at which it occurs. For example, if the presence of unmet demand is identified for a 5-10 minute period with 'normal' conditions prevailing in the prior and subsequent time periods, it is likely to be the result of an atypical event (e.g. a large group of people arriving in a short space of time) and therefore should not be considered as significant. Similarly, if the period of unmet demand occurs in a time period or at a rank where passenger demand and/or taxi supply is typically low (e.g. in the early morning) then it is not unreasonable to expect that average wait times will be longer then in busier periods and again it should not be considered as significant. Only if the unmet demand occurs over a sustained length of time during a time period when it is reasonable to expect that there should be a supply of taxis (e.g. weekday daytime) should it be deemed significant.

6.2 Analysis of Market Conditions

6.2.1 For the purposes of this study, average delay thresholds have been set at 2 minutes for passengers and 5 minutes for taxis. For a given taxi rank in a particular 5-minute period, if the average passenger delay is less than 2 minutes and the average taxi delay is less than 5 minutes, the market conditions at that rank are considered to be in 'equilibrium' (EQ) – i.e. demand and supply are broadly matched. If average passenger delay is 2 minutes or more but average taxi delay is less than 5 minutes, this indicates demand is exceeding supply and suggests that unmet demand (UD) may be present. Conversely, if average passenger delay is less than 2 minutes and average taxi delay is 5 minutes or more, this indicates that supply is exceeding demand and that there may be unused supply (US). In the unlikely event that average passenger delay exceeds 2 minutes and average taxi delay exceeds 5 minutes, it is not possible to reach a firm conclusion about the market conditions, as it suggests the presence of unstable market conditions usually associated with an atypical event.

6.2.2 The assessment matrix is summarised in Table 6.1 below.

[8] Transport Act 1985 – Section 16

Table 6.1
Taxi Market Condition Assessment Matrix

		Average Passenger Delay	
		< 2 mins	≥ 2 mins
Average Taxi Delay	< 5 mins	Equilibrium	Unmet Demand
	≥ 5 mins	Unused Supply	Unstable

6.2.3 Using the data collected in the Taxi Rank Surveys, the average passenger and taxi delays have been calculated for each rank in each 5 minute period surveyed. On the basis of these calculations, the prevailing market conditions have been determined using the matrix defined above. Figures 6.1-6.6 summarise the market conditions at each rank by time period for a weekday, weekend and Sunday respectively. 'No Activity' refers to periods when there was no passenger demand and no taxi supply (i.e. the taxi rank was empty).

6.2.4 Where a rank has no associated bar, this is due to the rank not being surveyed during the related time.

Figure 6.1
Analysis of Market Conditions: Weekday Official Ranks

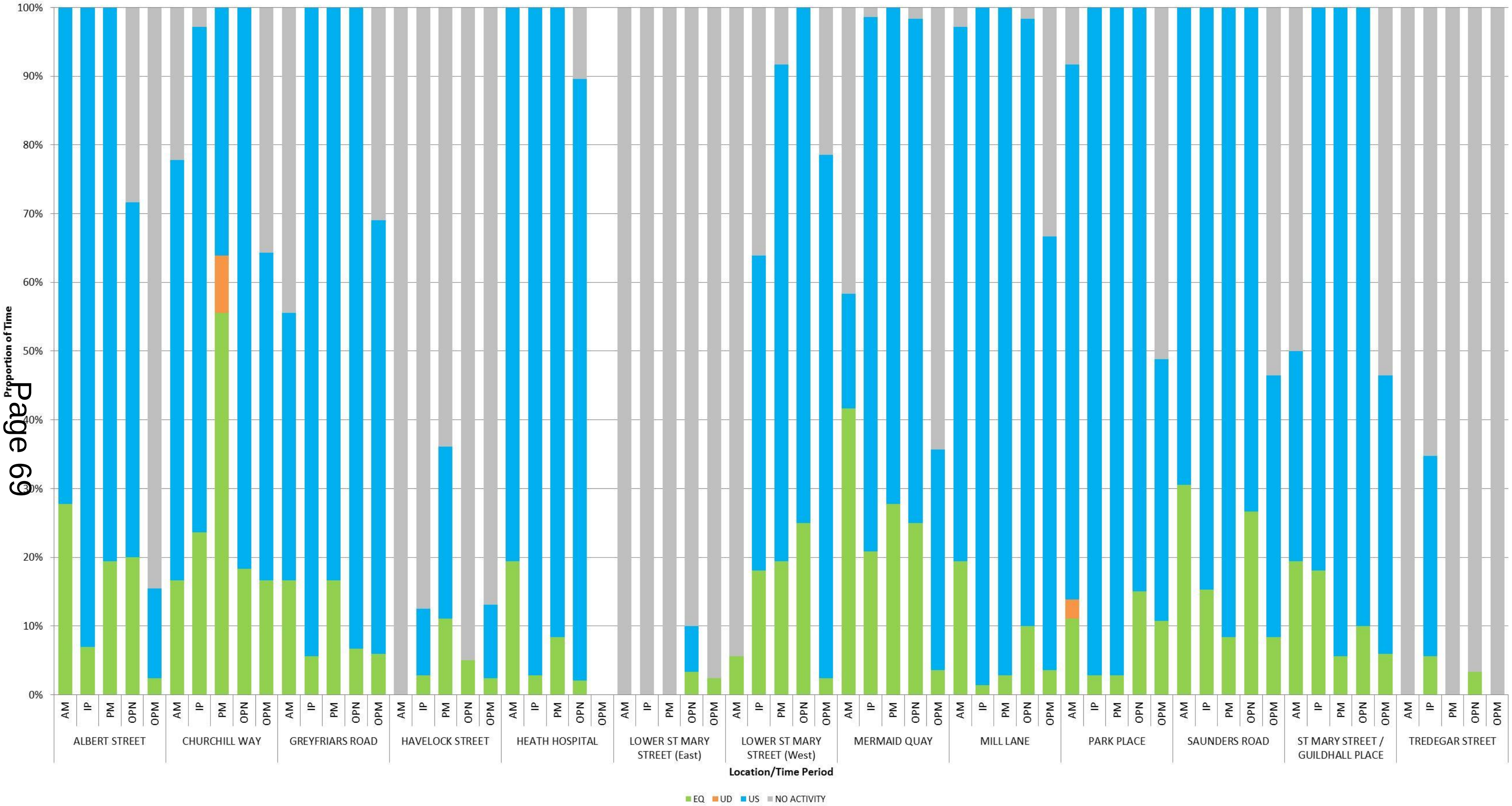


Figure 6.2
Analysis of Market Conditions: Weekday Unofficial Ranks

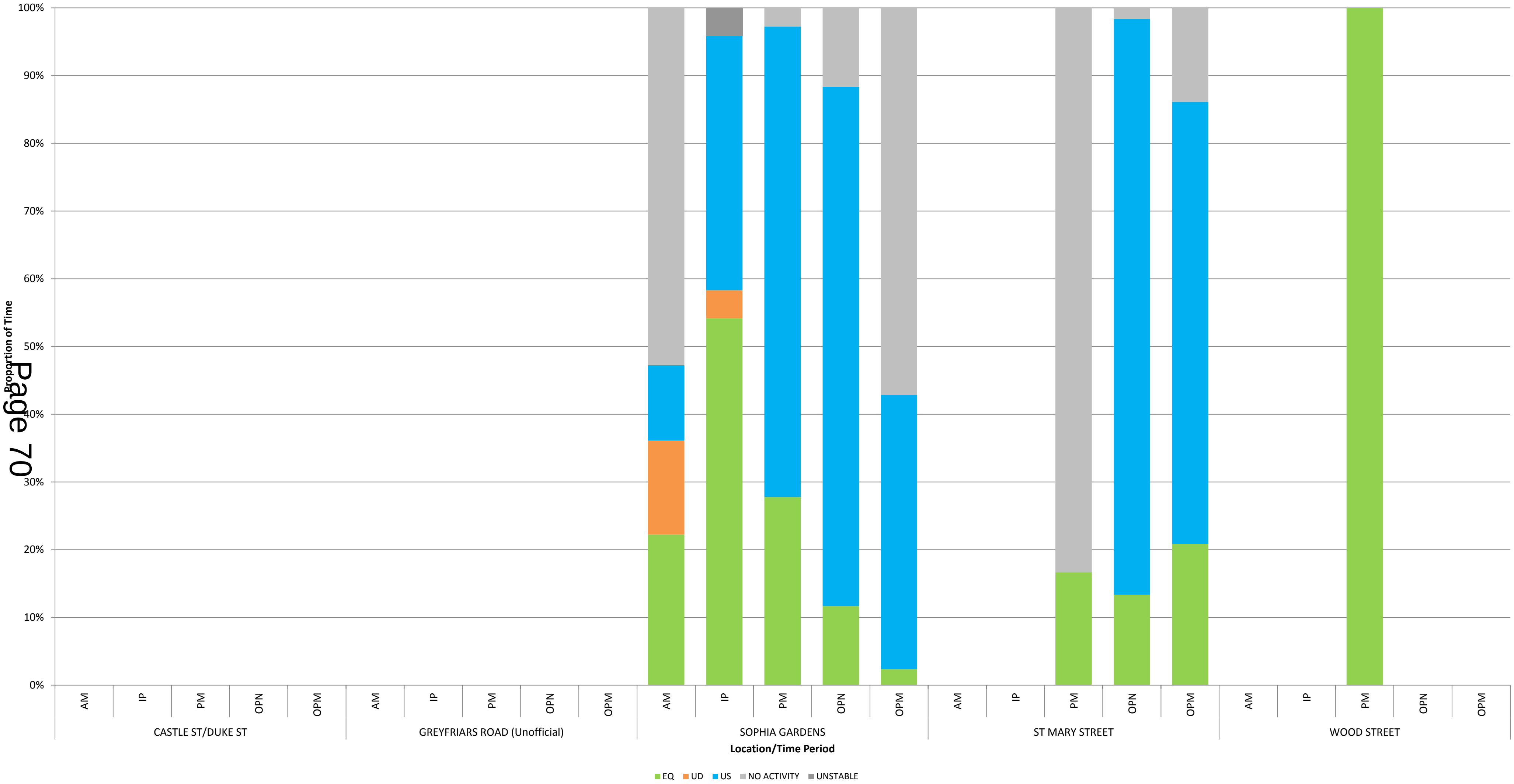


Figure 6.3
Analysis of Market Conditions: Weekend Official Ranks

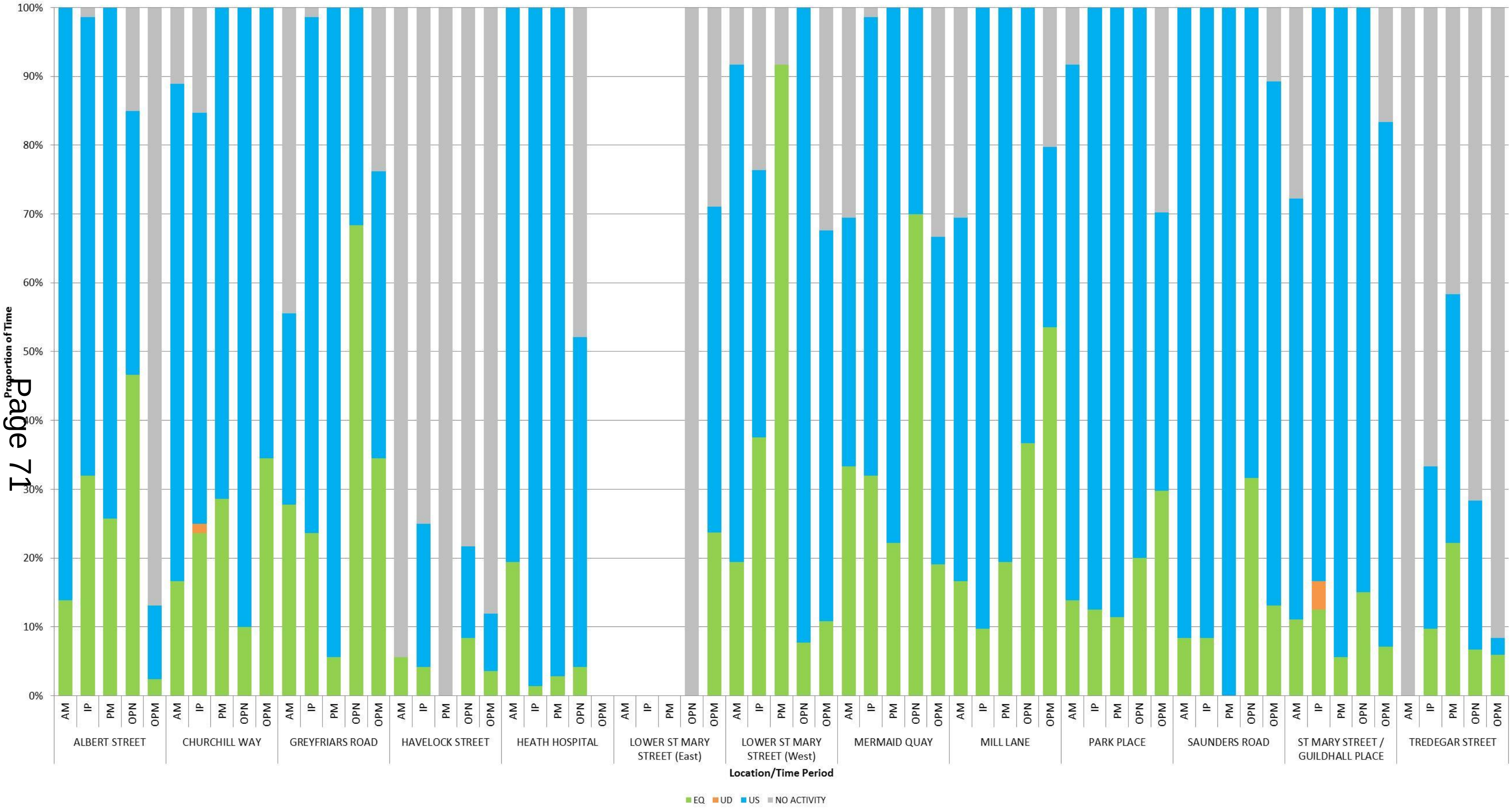


Figure 6.4
Analysis of Market Conditions: Weekend Unofficial Ranks

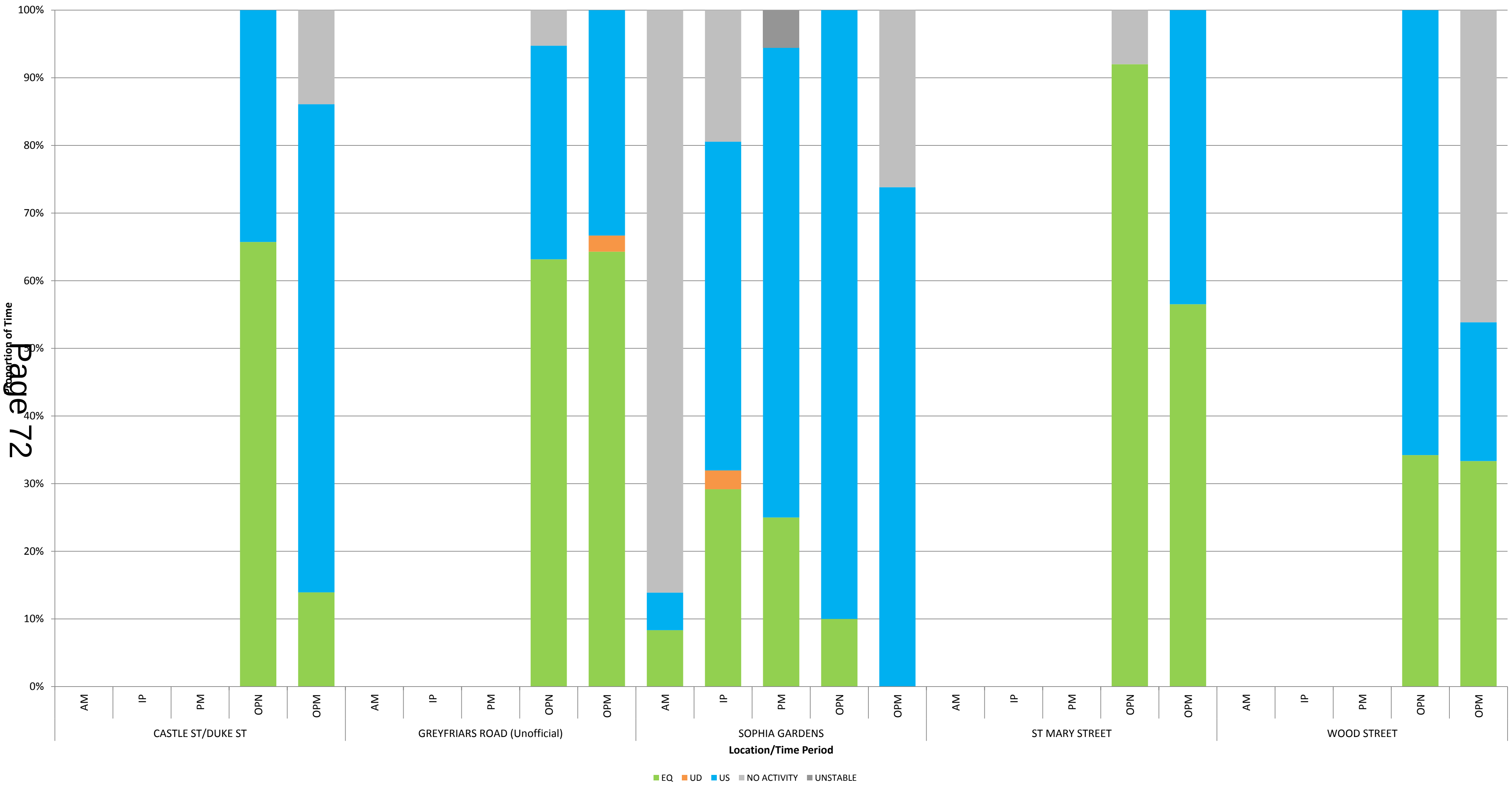


Figure 6.5
Analysis of Market Conditions: Sunday Official Ranks

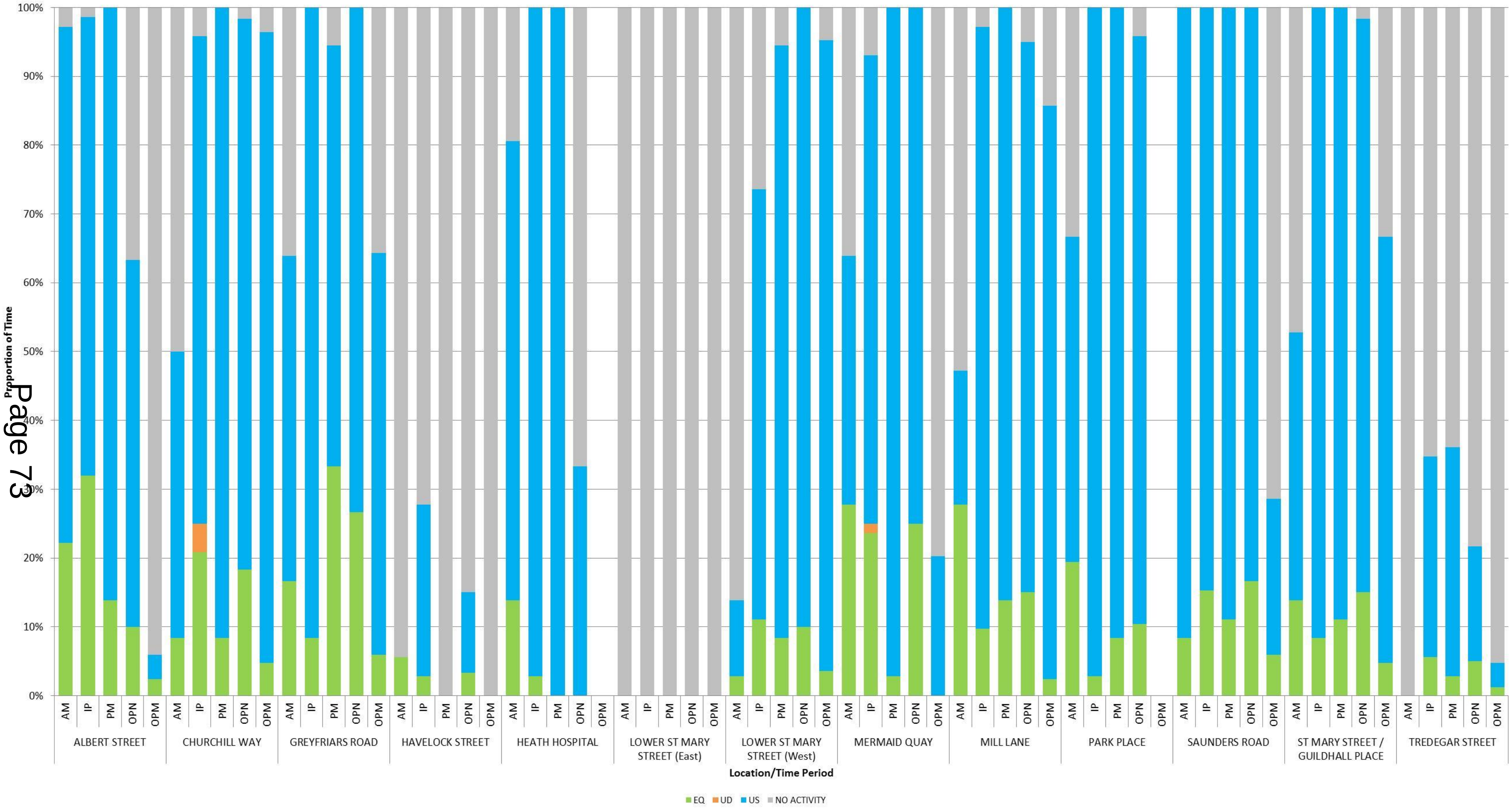
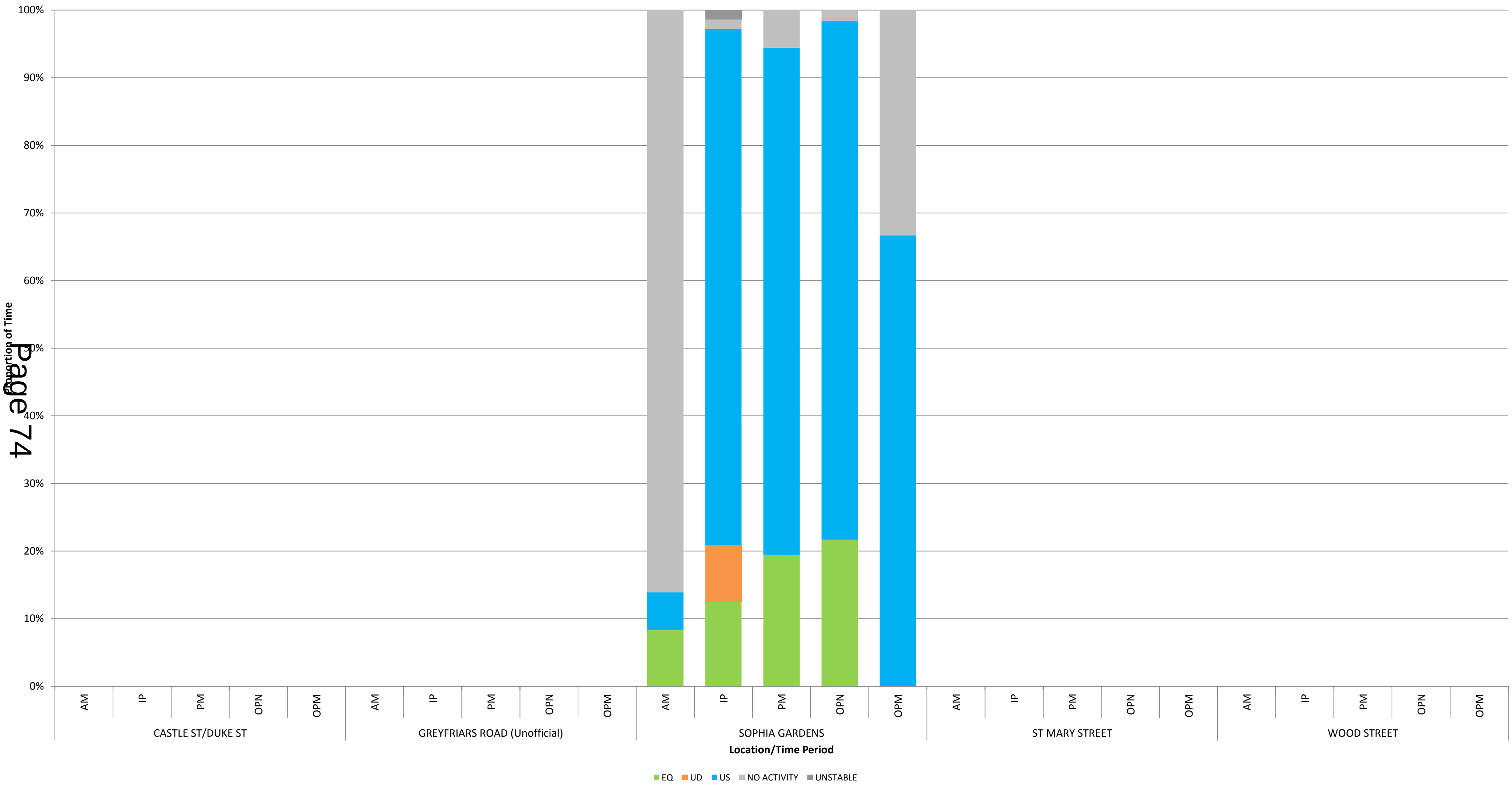


Figure 6.6
Analysis of Market Conditions: Sunday Unofficial Ranks



6.2.5 As noted above, this assessment in isolation does not definitively indicate the presence of UD or US; it is merely indicative of the potential presence of these market conditions.

6.2.6 Of all the incidences of unmet demand found, only the Churchill Way and Sophia Gardens ranks show unmet demand lasting two or more contiguous 5 minute periods. At Churchill Way on a weekday PM period unmet demand is reported for a 10 minute period between 16:25 and 16:35, and on a Sunday there is period where unmet demand occurs for 15 minutes between 12:20 and 12:35. In both cases there had been a continual queue of taxis available leading up to these periods and passengers arrive after taxis have recently departed. All of these passengers are able to depart in a taxi and no one walks away unsuccessful in these periods. The weekday unmet demand comes just after a peak in passenger demand and average passenger delay is less than 6 minutes, and the Sunday unmet demand is the only time throughout the 72 hours of observation that any passenger is queueing for a taxi, whereas taxis are queueing for the vast majority of the time. Therefore it is considered that the observed unmet demand does not constitute significant unmet demand.

6.2.7 As previously discussed in section 4.8, Sophia Gardens has unique behaviour observed, with uncertainty over whether passengers are waiting for a taxi at the taxi rank or are waiting for a pre-booked vehicle. The recorded unmet demand at this rank occurs in the weekday AM period for two 10 minute periods between 08:20 to 08:30 and 08:50 to 09:00, the weekday interpeak period for 10 minutes between10:00 to10:10 and 25 minutes in the Sunday interpeak period 10:00 to 10:25. It is hard to determine whether these are periods of genuine unmet demand or if passengers have pre-booked a vehicle, further supported by the result that the only periods of ‘unstable’ market conditions reported are at Sophia Gardens suggesting unusual data at this location. The Sunday period of unmet demand comes after a continual period of no activity and is followed by a continual period of unused supply of taxis. As this is an unofficial rank and each of these periods, apart from Sunday, last for no more than two consecutive 5 minute periods they are not considered significant.

6.2.8 All the remaining periods of unmet demand had duration of 5 minutes or less and are therefore also not considered to be significant.

6.3 Public Perceptions

6.3.1 The analysis of the data from the taxi rank observations indicates the presence of unused supply in the taxi market in Cardiff, however this is not immediately apparent from the responses to the public attitude survey. When asked about suggestions for improvements, as seen in Table 5.20, 0.4% indicated there should be improved availability of taxis whilst 0.5% felt there should be a reduction in taxis. This suggests that the general public do not feel that there are currently too many taxis in Cardiff, or at least do not perceive this to be a significant problem.

6.3.2 Overall the public attitude survey does indicate the need for more taxis. In Table 5.4, of the 221 respondents who said they had given up waiting for a taxi in the last 3 months, 89 indicated their reason was due to a lack of taxis. However this is not backed up by the taxi rank surveys where only 3 passengers from two 5-minute periods were observed walking away from a taxi rank across the whole study whilst 14,719 passengers left in a taxi. Furthermore, when respondents of the public attitude survey were later asked for their reasons for not using taxis more often, only 9 (1.2%) suggested it was due a limited availability of taxis, as seen in Table 5.16. Similarly in Table 5.19, when asked if they felt there are sufficient taxis 36% of respondents indicated there are, with only 7.8% indicating that there are not enough taxis available.

7 Comparison with 2013 Study

7 Comparison with 2013 Study

7.1 Background

7.1.1 Following the Cardiff Taxi Study, conducted in 2010, Cardiff Council placed a moratorium on the number of taxi licences available. The DfT Best Practice Guidance states that *'where restrictions are imposed the matter should be regularly reviewed…'* and *that '… the issue to be addressed first in each reconsideration is whether the restrictions should continue at all'*. In reaching its decision, the licensing authority should consider the following points:

- *What benefits or disadvantages arise for the travelling public as a result of the continuation of controls?*
- *What benefits or disadvantages would result for the travelling public if controls were removed?*
- *Is there any evidence that removal of controls would result in a deterioration in the amount or quality of taxi service provision?*

7.1.2 Even if the licensing authority takes the view that continued restriction can be justified in principle, further consideration is required over the level at which it should be set, that is whether the moratorium should remain at the same level or be increased.

7.1.3 In order to determine whether there is justification for maintaining the moratorium in Cardiff and if so the level at which the limit should be set, the results of the 2016 taxi rank survey and the public attitude survey have been compared with the results of the previous 2013 study to determine how the conditions have changed over that period. The results of this comparison are summarised below.

7.2 Taxi Rank Survey

7.2.1 The 2016 taxi rank surveys were carried out at all 13 official ranks for a period of 72 hours covering all day types and time periods. This compares with the 2013 taxi rank survey which covered all 15 official ranks, two of which have since been closed. In addition, five unofficial ranks were partially surveyed in 2016, compared with seven unofficial ranks in 2013.

7.2.2 The survey methodology was exactly the same between 2013 and 2016, and so is directly comparable.

7.2.3 The DfT guidance references three points licence quantity controls should not do. Therefore it is useful to compare the 2013 data to see what affect the introduction of the moratorium has had. These three points are as follows.
Quantity controls should not:

- Reduce the availability of taxis;
- Increase wait time for consumers;
- Reduce choice and safety for consumers.

Change in Demand and Availability

7.2.4 The change in demand and availability of taxis will show if there has been any reduction in availability of taxis. Figures 4.2 – 4.4 from Section 4 show the average passenger demand, effective demand and average taxi supply over the 24 hour period for each day type.

7.2.5 Figures 7.1 – 7.3 below show the comparisons between 2016 and 2013.

Figure 7.1
Comparison of Average Passenger Demand

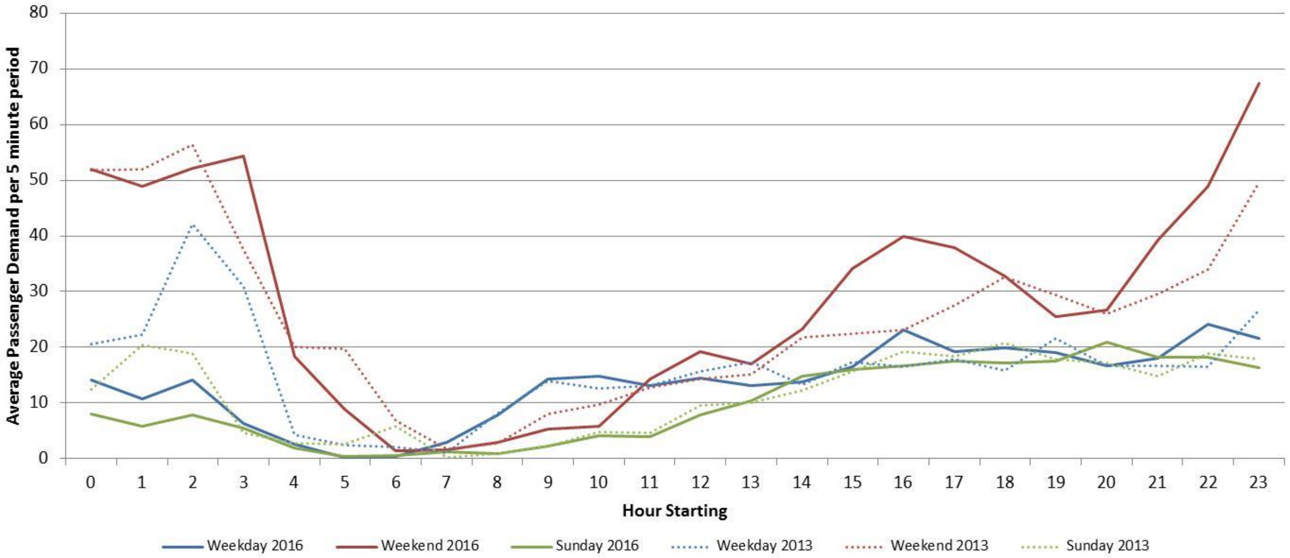


Figure 7.2
Comparison of Effective Taxi Demand

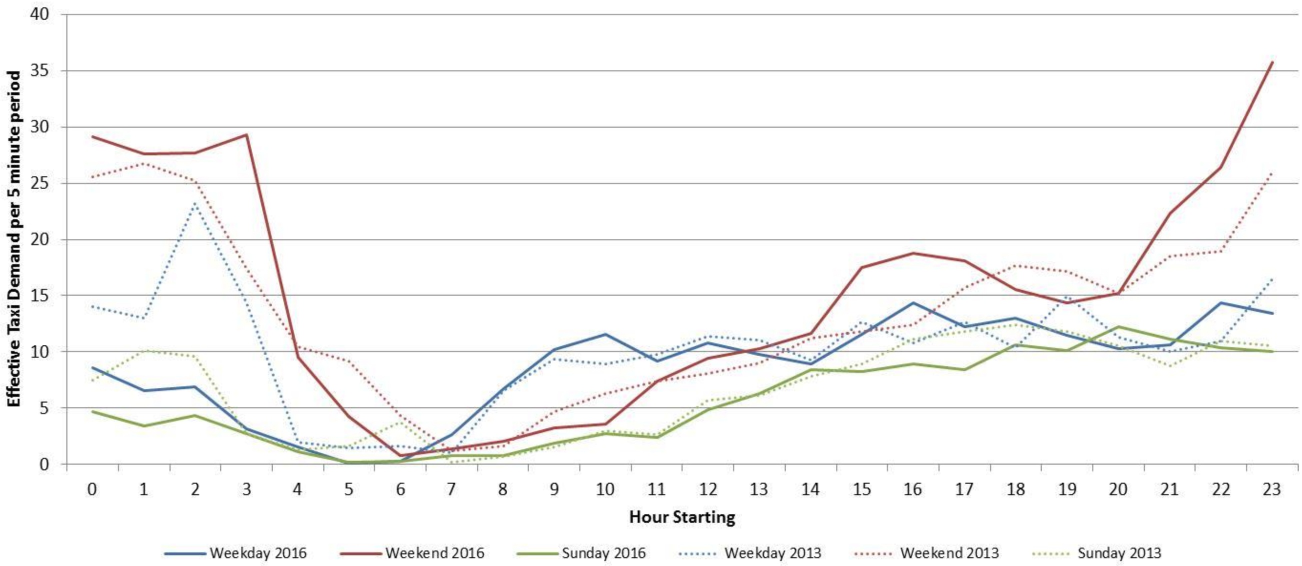
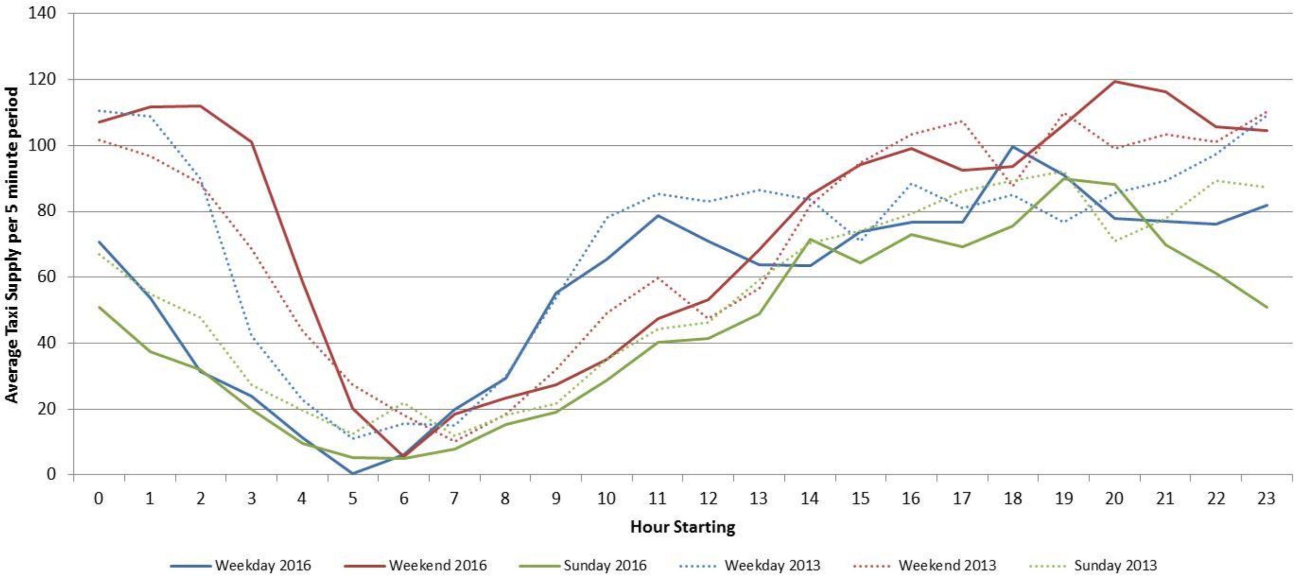


Figure 7.3
Comparison of Average Taxi Supply



7.2.6 The most significant change between 2013 and 2016 is a marked reduction in passenger demand on weekday nights, with peak demand falling by more than 65% from over 40 passengers per 5-minute period in 2013 to less than 15 passengers per 5-minute period in 2016. Average Sunday night time demand has also reduced, with weekend demand increasing in 2016 between 14:00-18:00 and 20:00-23:00. The weekend night time peak is similar to 2013 although it shifted one hour later to 03:00, and the remaining time periods follow a similar pattern and value to 2013.

7.2.7 Taxi supply appears to have responded to the changes in passenger demand, with the number of taxis available during the weekday night time peak falling by around 65%. There is an increase in the taxi supply during the weekend night time, with peak supply rising from around 88 taxis in 2013 to 112 taxis in 2016. Daytime supply follows a similar pattern in both years, although there is a slight decrease in weekday interpeak supply in 2016. Sunday night time supply has decreased slightly in 2016.

Change in Passenger Wait Time

7.2.8 Table 7.1 compares the average passenger wait times in 2013 and 2016, to see if there has been an increase in wait time for passengers since the moratorium was put in place.

Table 7.1
Comparison of Average Passenger Wait Times

Location	**2013**				**2016**			
	Weekday	**Weekend**	**Sunday**	**Overall**	**Weekday**	**Weekend**	**Sunday**	**Overall**
Albert Street	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	**0.0**
Central Square	0.0	0.0	0.0	**0.0**				
Churchill Way	2.1	1.1	0.0	**1.1**	3.7	0.8	3.1	**2.6**
Glynrhondda St	0.0	0.0	0.0	**0.0**				
Greyfriars Road	0.0	0.3	0.0	**0.1**	0.0	0.0	0.0	**0.0**
Havelock Street	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	**0.0**
Heath Hospital	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	**0.0**
Lower St Mary Street (East)	-	0.0	-	**0.0**	0.0	0.0	0.0	**0.0**
Lower St Mary Street (West)	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	**0.0**
Mermaid Quay	0.0	1.0	0.0	**0.3**	0.0	0.0	0.8	**0.3**
Mill Lane (South)	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	**0.0**
Park Place	0.0	0.0	0.0	**0.0**	0.5	0.0	0.0	**0.2**
Saunders Road	1.7	3.2	0.0	**1.6**	0.0	0.0	0.0	**0.0**
St Mary Street / Guildhall Pl	0.0	0.0	0.0	**0.0**	0.0	1.9	0.0	**0.6**
Tredegar St	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	**0.0**
Duke St / Castle St	0.0	-	-	**0.0**	-	0.0	-	**0.0**
Greyfriars Rd (Lloyds Bar)	-	-	0.0	**0.0**	-	7.6	-	**7.6**
Marshalled - Greyfriars Rd	0.0	-	-	**0.0**	-	-	-	**-**
Kingsway	0.0	-	-	**0.0**	-	-	-	**-**
Marshalled - Mill Lane	-	0.0	-	**0.0**	-	-	-	**-**
Sophia Gardens					7.1	3.4	16.1	**8.9**
St Mary St (O'Neills)	0.0	-	0.0	**0.0**	0.0	0.0	-	**0.0**
Wood St / Westgate St	-	0.0	-	**0.0**	0.0	0.0	-	**0.0**
Grand Total	0.2	0.4	0.0	**0.2**	0.8	0.5	1.5	**0.9**

Ranks shown in grey no longer exist, or did not exist in 2013.

Ranks which were not observed on a particular day type are marked with a -

7.2.9 The analysis indicates that the overall average passenger wait time was 0.2 seconds in 2013 and 0.9 seconds in 2016, however this includes the results of the Sophia Gardens rank which has unique behaviour as discussed in section 4.8 and therefore may be skewing the results. With the Sophia Gardens results excluded from the table, the 2016 overall average passenger wait time drops to 0.3 seconds indicating that the continuation of the moratorium on the issue of new licences has not had a detrimental impact on passenger delay.

Change in Significant Unmet Demand

7.2.10 The percentage split between taxi rank conditions being classed as equilibrium, unused supply (US), unmet demand (UD), unstable or no activity is shown below in Table 7.1. Charts showing the same information are included in **Appendix C**.

Table 7.1
2013 and 2016 Market Conditions Comparison

Market Condition	Weekday		Weekend		Sunday	
	2013	**2016**	**2013**	**2016**	**2013**	**2016**
Equilibrium (EQ)	12.09%	11.27%	16.69%	21.81%	9.45%	9.22%
Unmet Demand (UD)	0.11%	0.28%	0.25%	0.18%	0.14%	0.26%
Unused Supply (US)	50.57%	51.83%	49.70%	54.75%	50.54%	55.34%
Unstable	0.00%	0.07%	0.00%	0.05%	0.00%	0.03%
No Activity	37.23%	36.54%	33.36%	23.22%	39.87%	35.16%
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

7.2.11 The results show that on weekends the proportion of time that the market is operating in equilibrium has increased marginally, and on weekdays and Sundays has decreased by less than 1%. The proportion of time when there is unmet demand has slightly decreased on weekends and marginally increased on weekdays and Sundays, with a change of 0.17% and 0.12% respectively. The proportion of time when there is unused supply has remained relatively constant in the weekday period, but there is an increase during the weekend and Sunday periods. These results include the data from Sophia Gardens, which when removed gives the same results for unmet demand in weekday and Sunday 2013 and 2016 results, and a larger drop in 2016 weekend unmet demand. Overall, the assessment indicates that market conditions are largely unchanged from 2013, suggesting that the continuation of the moratorium on the issue of new taxi licences has not disadvantaged passengers.

7.3 Public Attitude Survey

7.3.1 The public attitude survey covered a sample of 733 people on the streets of Cardiff in 2016 and 1000 in 2013. Many questions were unchanged from the 2013 study, and an additional part to question 5 added for clarity. The reduced sample was compared to the 2011 census to confirm it was comparable and therefore deemed a suitable representation.

Availability of Taxis

7.3.2 In 2013 and 2016 respondents were asked to give suggestions for improvements to taxi service. In 2013, improved availability was listed by 3.5% of respondents in comparison to 0.4% in 2016. In contrast, reduced taxi numbers was listed by 0.4% in 2013 and similarly 0.5% in 2016.

7.3.3 Additionally, respondents were asked to give the reasons they did not use licensed vehicles more often in both 2013 and 2016. Availability was listed by 0.4% of respondents in 2013 and 1.2% in 2016. These results indicate relatively little change in public perception on availability, particularly when viewed in conjunction with the drop in suggestions for improved availability. Respondents were also asked directly whether they felt there are a sufficient number of taxis in Cardiff, with only 7.8% feeling there are insufficient numbers in 2016 compared with 8.6% in 2013, suggesting little change over the last 3 years and no emerging problem.

Understanding of Taxis and Private Hire Vehicles

7.3.4 In both years, the question on whether the respondent thought all licensed vehicles can be hired on ranks and by flagging them down was asked. In 2013 37% said yes compared with 30% in 2016 implying a slight improvement in understanding. However, in 2013 60% said no which is higher than the 2016 number of 52%.

Suggested Improvements

7.3.5 In 2013, the top rated suggested improvements were related to customer service and the cost of fares. This has been replicated in the 2016 study, indicating these issues still exist and have not been improved over the three years.

8 Summary

8 Summary

8.1 Summary

8.1.1 Cardiff Council (CC) controls the issuing of taxi licences in Cardiff. Following a previous study in 2010 where there was no evidence of significant unmet demand, the Council imposed a moratorium on the issue of new taxi licences. This restriction was left in place following a further study in 2013.

8.1.2 Under Department for Transport (DfT) Taxi and Private Hire Vehicle Licensing Best Practice Guidance[9], a new study is required at a maximum interval of three years when a quantity restriction is in place. A new study is now due.

8.1.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.

8.1.4 The main objectives of the study are as follows:

- To identify the current level of demand for taxis within Cardiff;
- To assess whether the supply of taxis matches the demand;
- To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
- To identify areas of the service that could be improved.

8.1.5 In order to meet these objectives six different surveys have been undertaken. These surveys are described in three separate reports, with one overriding report summarising all the information and drawing the key conclusions and making recommendations. The four reports are listed below:

Report	Surveys
Cardiff Taxi Licensing Study 2016: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2016: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2016: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2016: Part 4: Summary Report	• Summary of the above surveys

8.1.6 This report is the Taxi Rank Operations and Public Attitude Survey which analyses and summarises the findings of the taxi rank and public attitude surveys to help determine the current level of service and market conditions in Cardiff.

8.1.7 The Taxi Rank Surveys were very thorough, providing an almost complete assessment of all the sites at all times. The exception being the temporary sites where surveys were only completed during times of operation and some instances where sites were closed for weekend nighttimes.

8.1.8 Surveys showed the passenger demand for taxis to progressively build from a 7am low to a peak between 10pm and 3am. The pattern is consistent between weekday, weekend and Sunday surveys, however the scale of the demand is exaggerated on the weekend and the peak occurs earlier on Sundays.

8.1.9 Occupancy surveys suggest an average occupancy of 1.7 people per taxi, this figure is higher during the weekend and lower during weekday daytimes, which is consistent with the trip purpose expected during these times.

[9] https://www.gov.uk/government/publications/taxi-and-private-hire-vehicle-licensing-best-practice-guidance

8.1.10 Effective taxi demand and taxi supply follow a similar profile throughout the day, however the peaks and troughs are less pronounced. Compared against the passenger demand data, despite the consistency of the patterns, a clear oversupply of taxis can be seen across the network.

8.1.11 Passenger delay analysis showed no delays being experienced by passengers, apart from anomalous occasions and unique behaviour at Sophia Gardens. Consistent with this is the delay experienced by taxis waiting for a fare, with the majority of drivers waiting over 5 minutes for a fare and some delays of over two hours. Delays at Heath Hospital are highest overall with delays of 15 minutes on average and over 27 minutes on Sunday PM peaks. Saunders Road and Sophia Gardens Place experienced similar levels.

8.1.12 The Public Attitude Survey highlighted a possible lack of understanding of the difference between a taxi and a private hire vehicle, as 30.2% respondents who believed all licensed vehicles could be hired on ranks or by flagging them down.

8.1.13 The survey asked how much people thought a specified trip by taxi would cost, the results showed a wide spread of costs, indicating a general lack of understanding of the pricing structure for journeys by taxi.

8.1.14 The main reasons stated for not using licensed vehicles was a preference for other modes, followed by cost and 'no need' for them. All other factors, including safety, convenience, quality and availability, were given by below 5% of respondents, and availability by only 1.2%. This answer is confirmed by the fact that only 7.8% said they thought there were not enough taxis in the city.

8.1.15 There was a low response to the question of improving the service provided by licensed vehicles in the city, the top suggestion being an improvement to driver customer service which was proposed by 9.4% of respondents, with reduced fares the next highest at 3.3%. However, 70% of people did not answer this question.

8.1.16 A Taxi Market Condition Assessment Matrix has been determined to account for both passenger delays and taxi delays. This matrix was applied to each rank during each time interval for each day. This graphs determined using the matrix show rare occasions where the status of the rank is deemed to have unmet demand, none of which can be considered significant. However, each of the ranks spend much of their time with unmet supply, this is supported by the Public Attitude Survey, which indicated no need for more taxis.

8.1.17 The criteria for retaining a quantity control is that the conditions have not changed sufficiently to result in reduction in the availability of taxis, increased waiting times for consumers or a reduction in the choice and safety for consumers. The surveys in this report do not indicate that such a significant change has occurred.

8.1.18 The level the quantity control is set at should also be reviewed, as such a comparison between the 2013 data and the 2016 data has been completed to determine if the conditions have changed sufficiently to warrant a change in the level of licence numbers that is set. Passenger demand has significantly dropped on a weekday night time, but risen slightly during weekend afternoons and evenings. This trend has been mirrored by the taxi supply. Passenger delay times have been compared and are considered to be unchanged when considering Sophia Gardens as a separate unique case.

8.1.19 The Taxi Market Condition Assessment Matrix applied to both 2013 and 2016 shows little difference in market conditions, particularly when considering Sophia Gardens as a separate unique case. The evidence suggests that the continuation of the moratorium on the issue of new taxi licences has not disadvantaged passengers.

Appendix A:
Taxi Rank Locations

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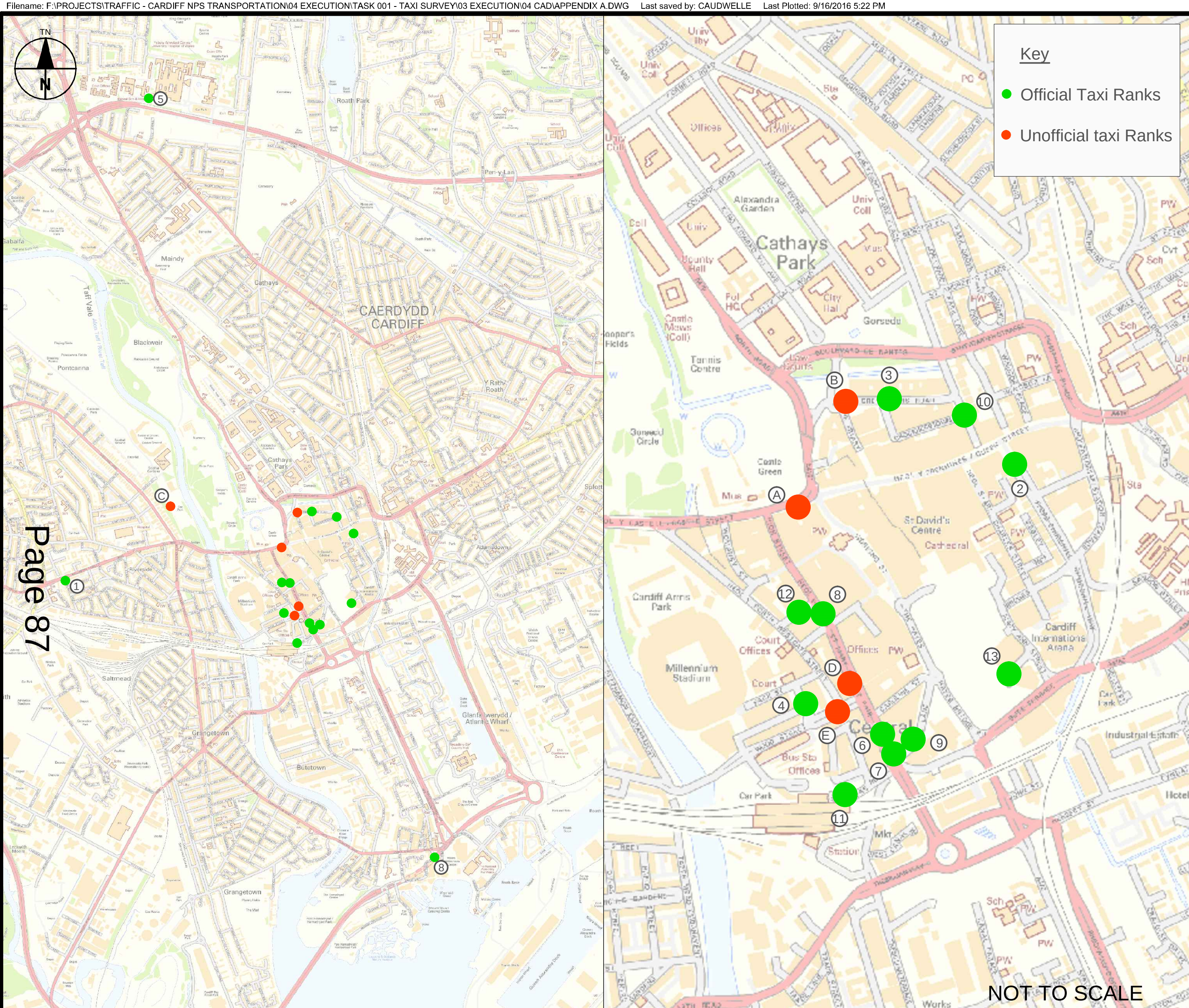
Project Management Initials: Designer: RY Checked: Approved: ISO A4 210mm x 297mm



Location of Official Taxi Ranks	Hours of Operation
(1) Albert Street	24hr
(2) Churchill Way	24hr
(3) Greyfriars Road	24hr
(4) Havelock Street	24hr
(5) Heath Hospital	07:00-23:00
(6) Lower St Mary Street (East)*	19:00-07:00
(7) Lower St Mary Street (West)*	24hr
(8) Mermaid Quay	24hr
(9) Mill Lane (South)	24hr
(10) Park Place	06:00-23:00
(11) Saunders Road (Cardiff Central Station)	24hr
(12) St Mary Street / Guildhall Place	24hr
(13) Tredegar Street	24hr

Location of Unofficial Taxi Ranks	Hours of Operation
(A) Duke Street / Castle Street	Informal
(B) Greyfriars Road (Unofficial)	Informal
(C) Sophia Gardens	Coach stop - 24hr
(D) St Mary Street (outside O'Neills)	Informal
(E) Wood Street / Westgate Street	Informal

Cardiff Taxi Licensing Study 2016

Taxi Rank Locations

Appendix A

AECOM

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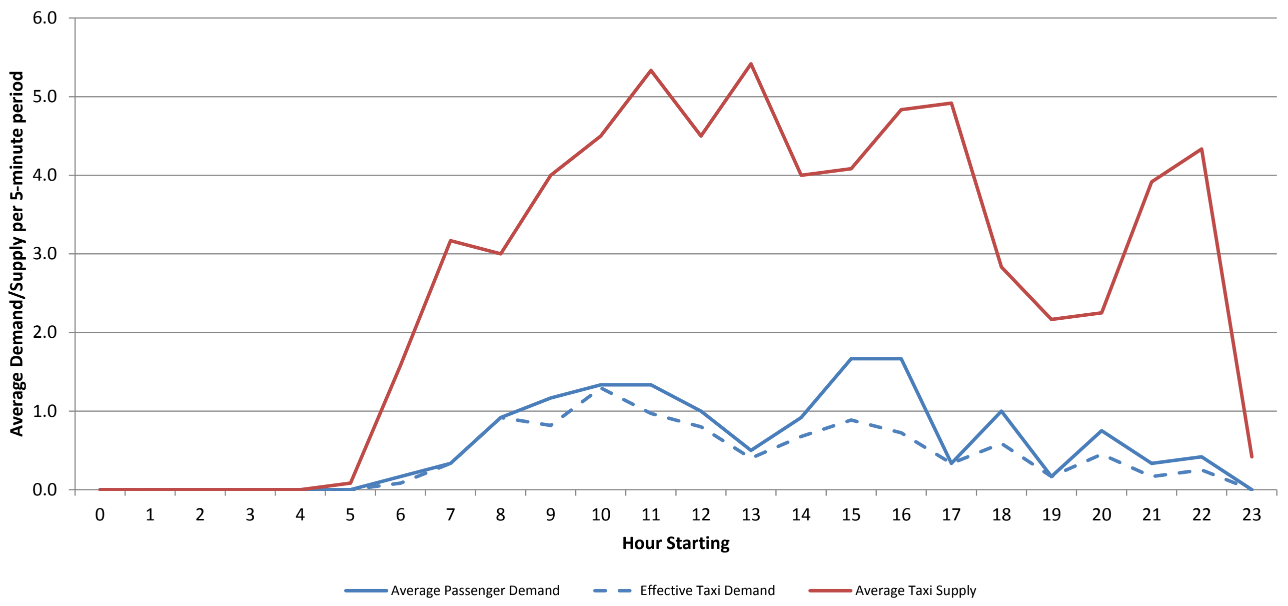
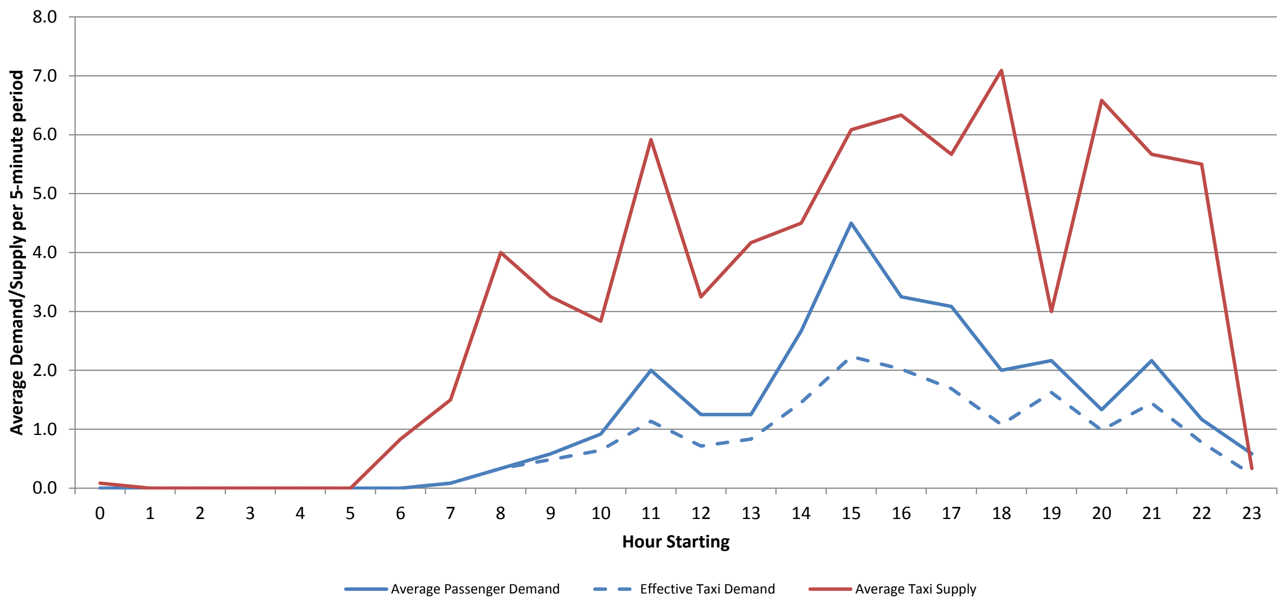
Appendix B:
Comparison of Demand and Supply

Albert Street

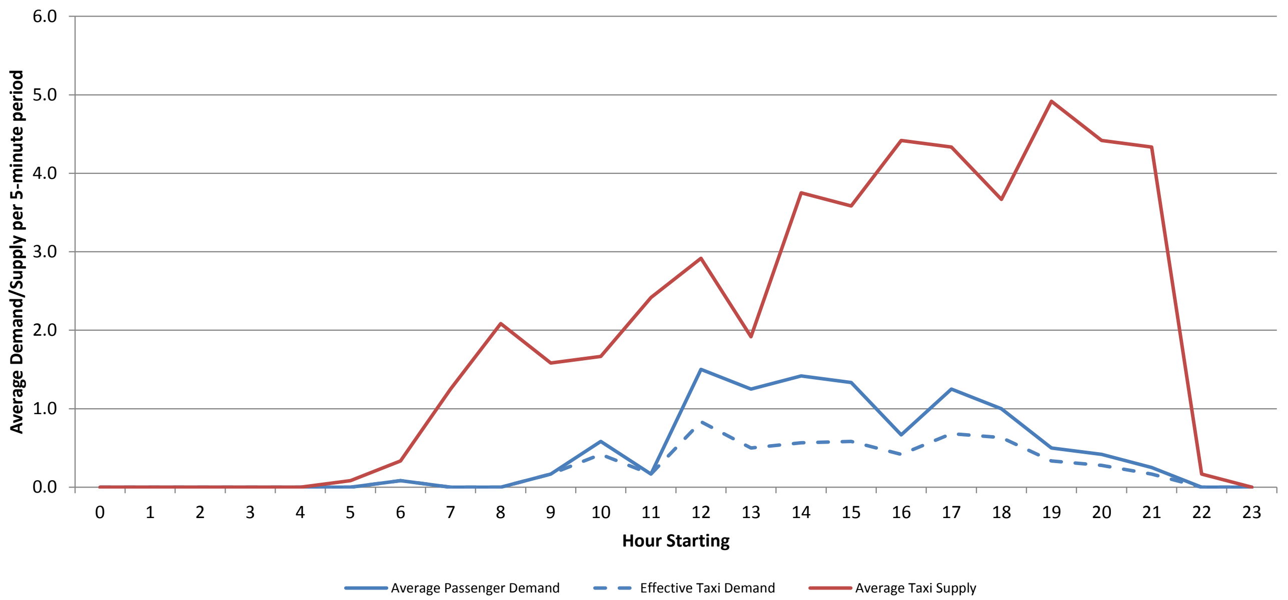
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

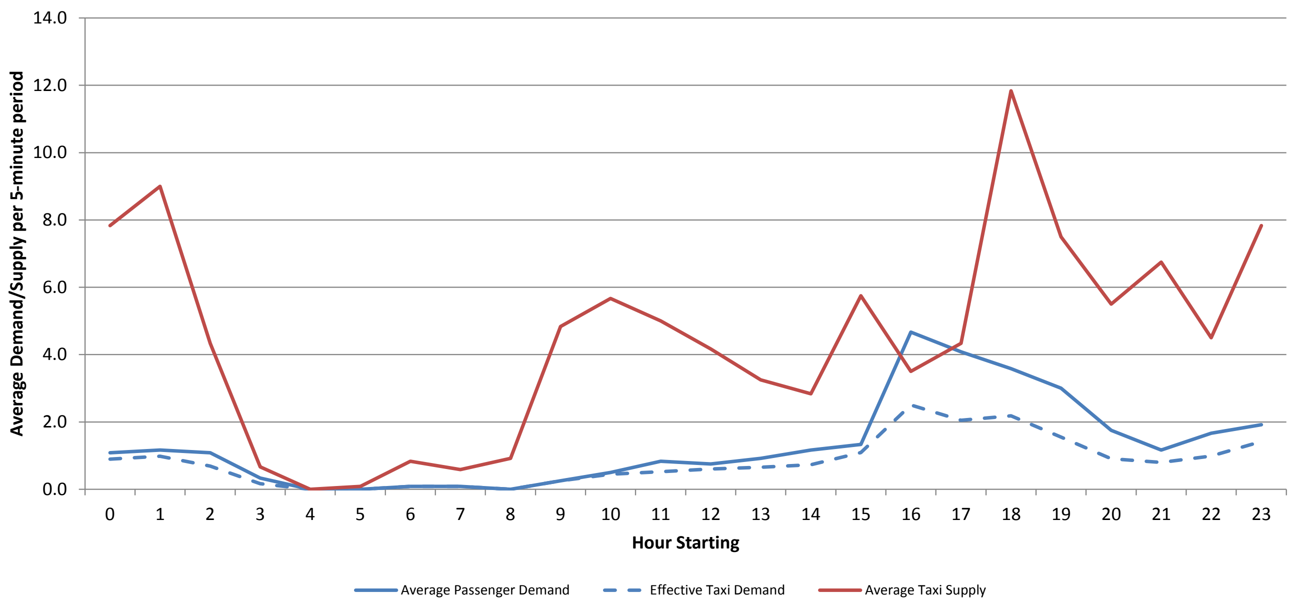


Comparison of Demand and Supply: Sunday

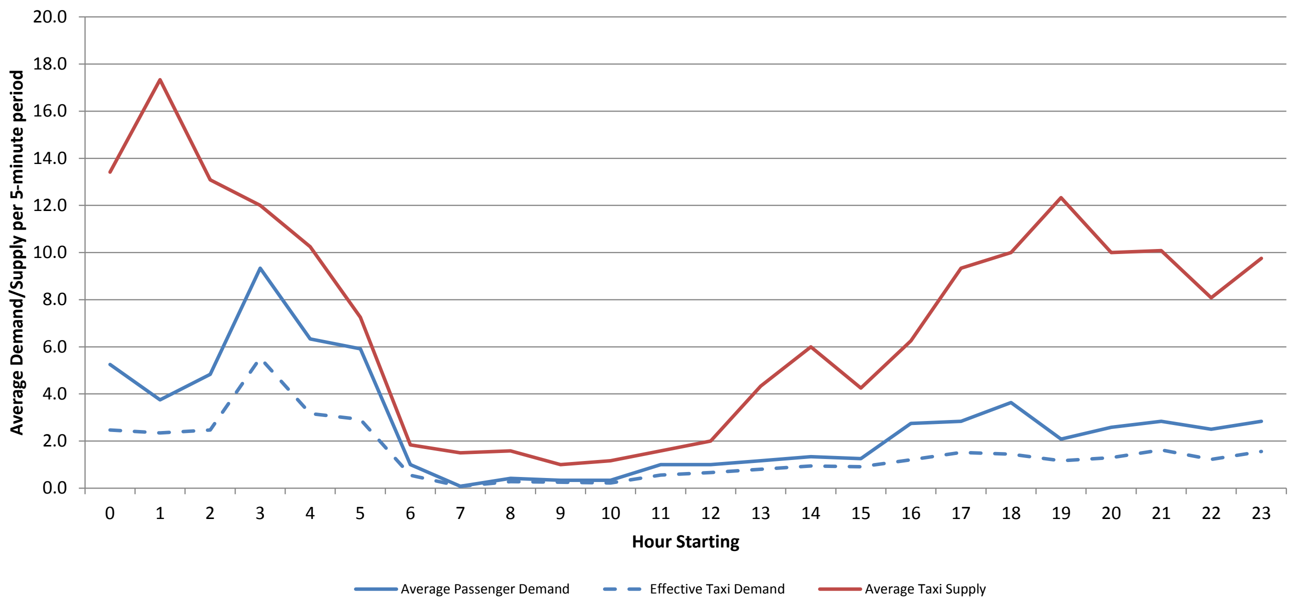


Churchill Way

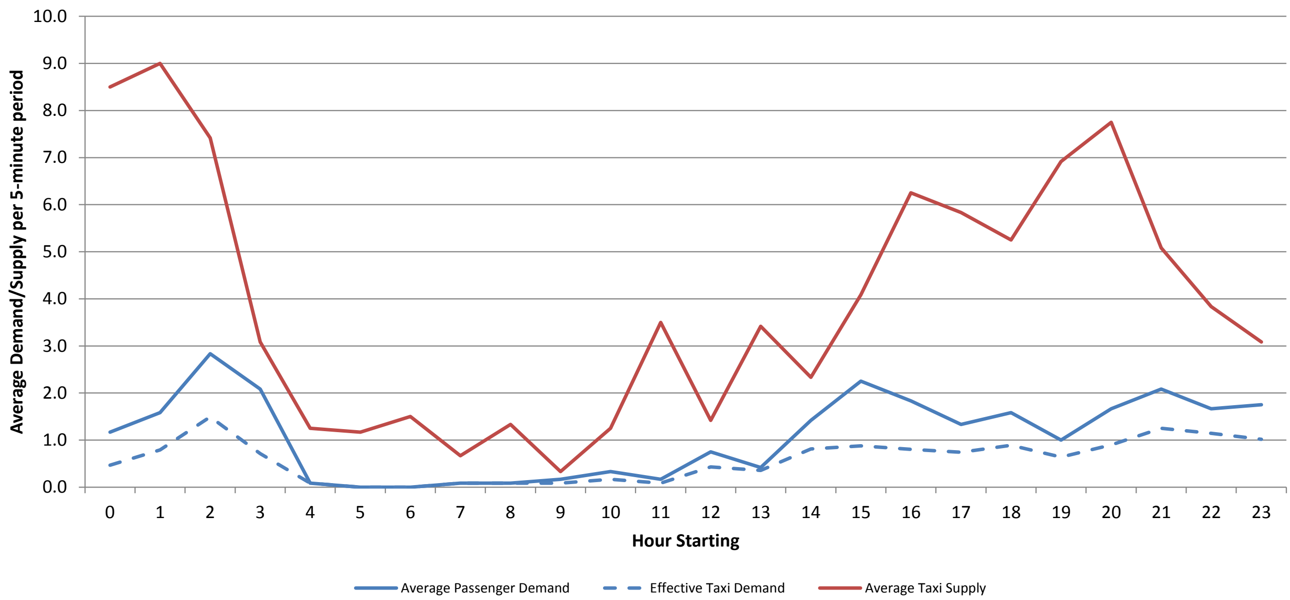
Comparison of Demand and Supply: Weekday



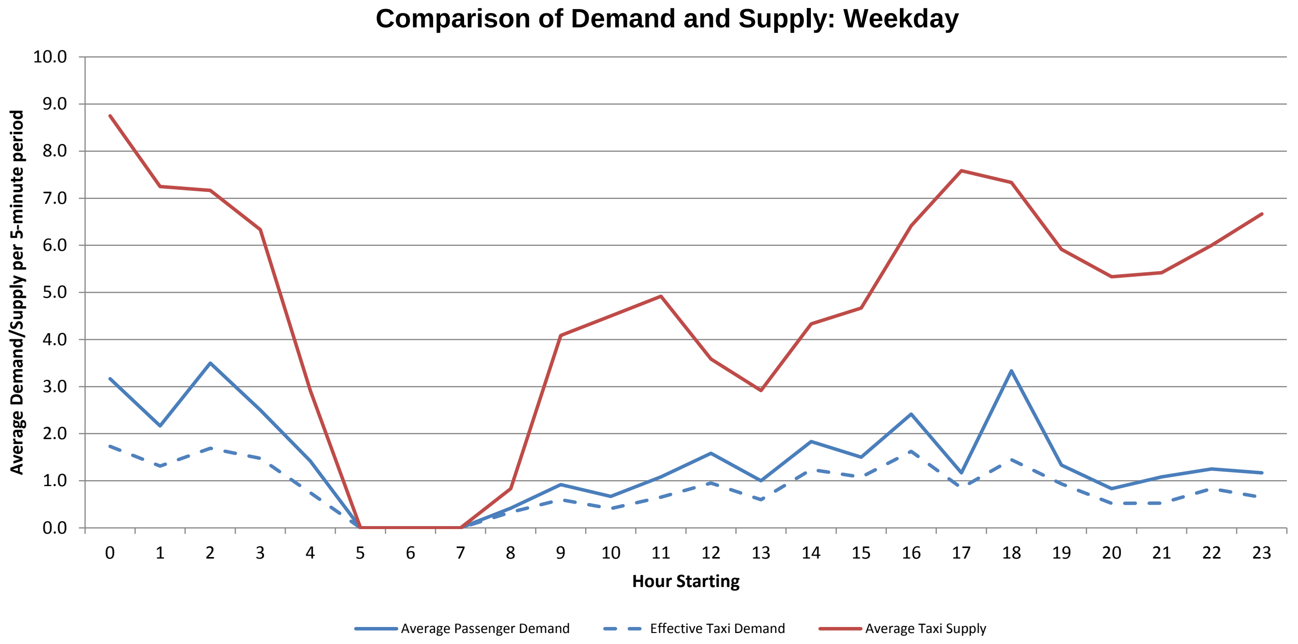
Comparison of Demand and Supply: Weekend

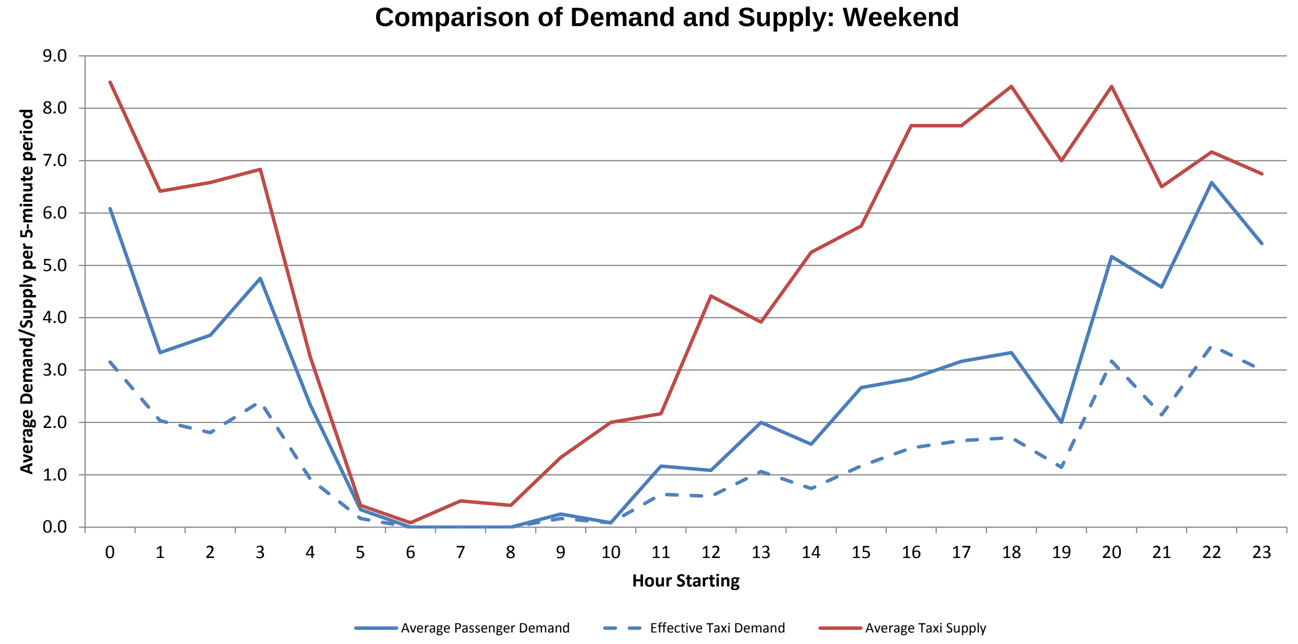


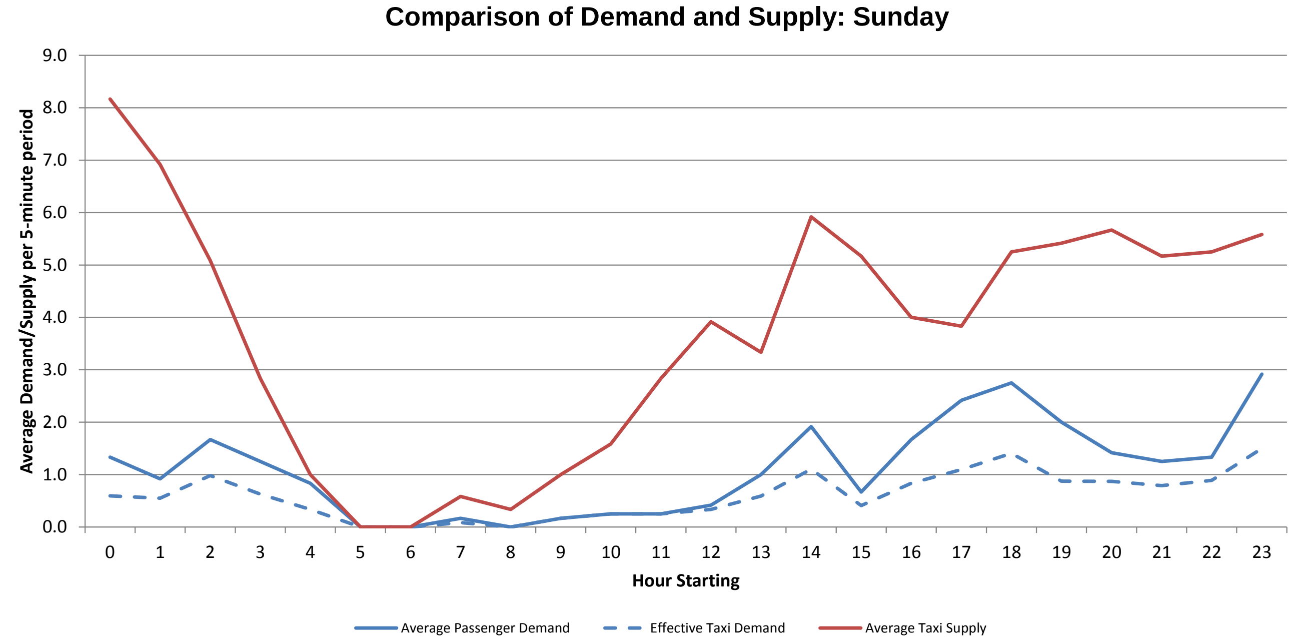
Comparison of Demand and Supply: Sunday



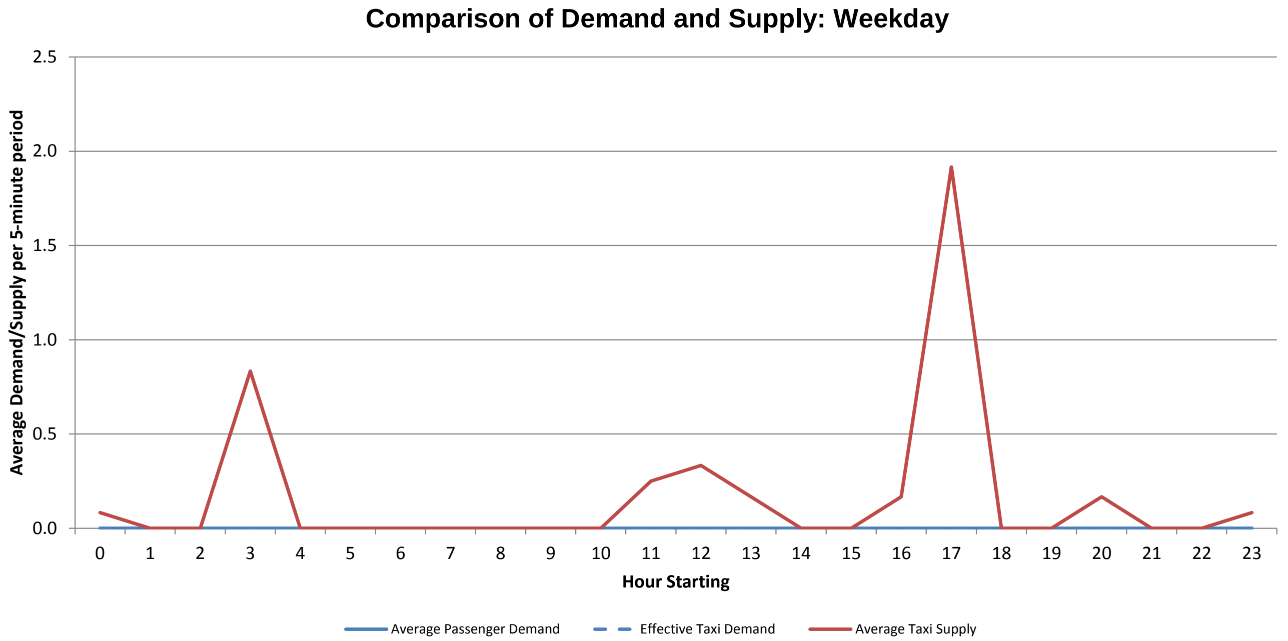
Greyfriars Road

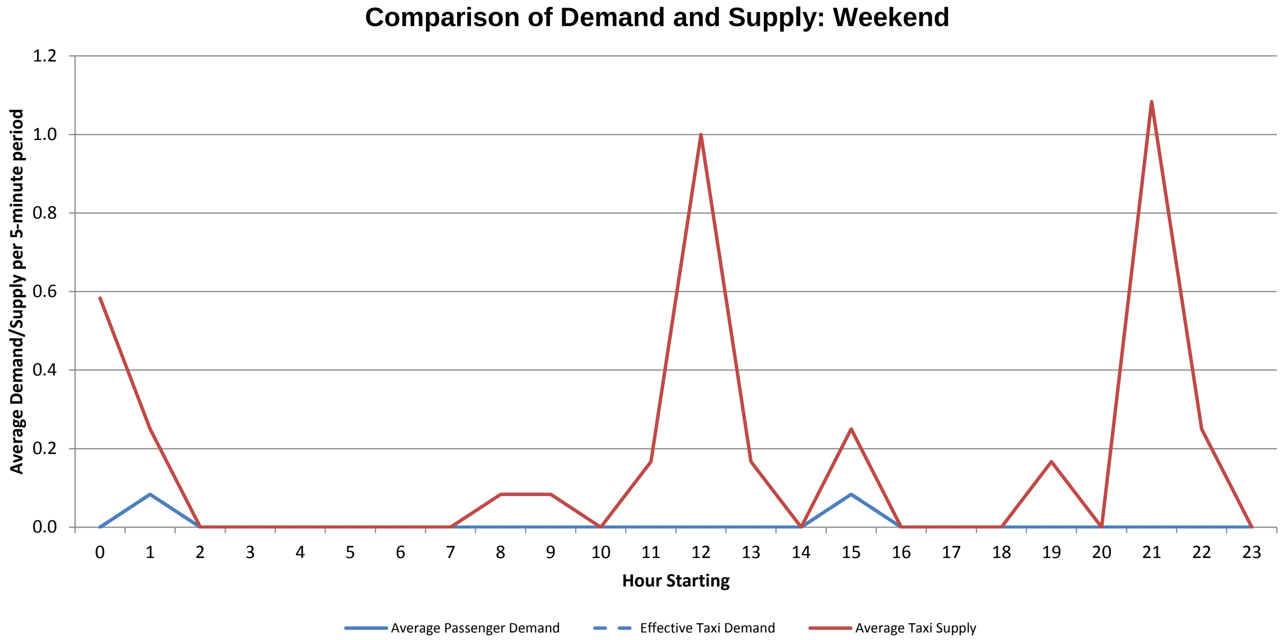


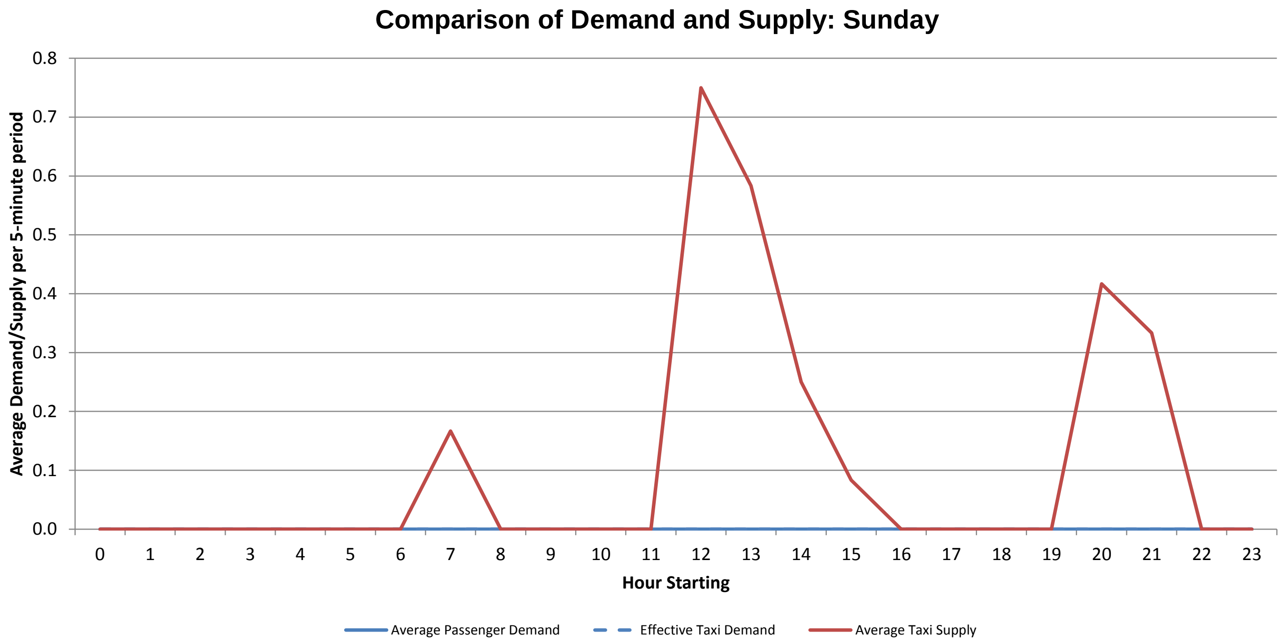




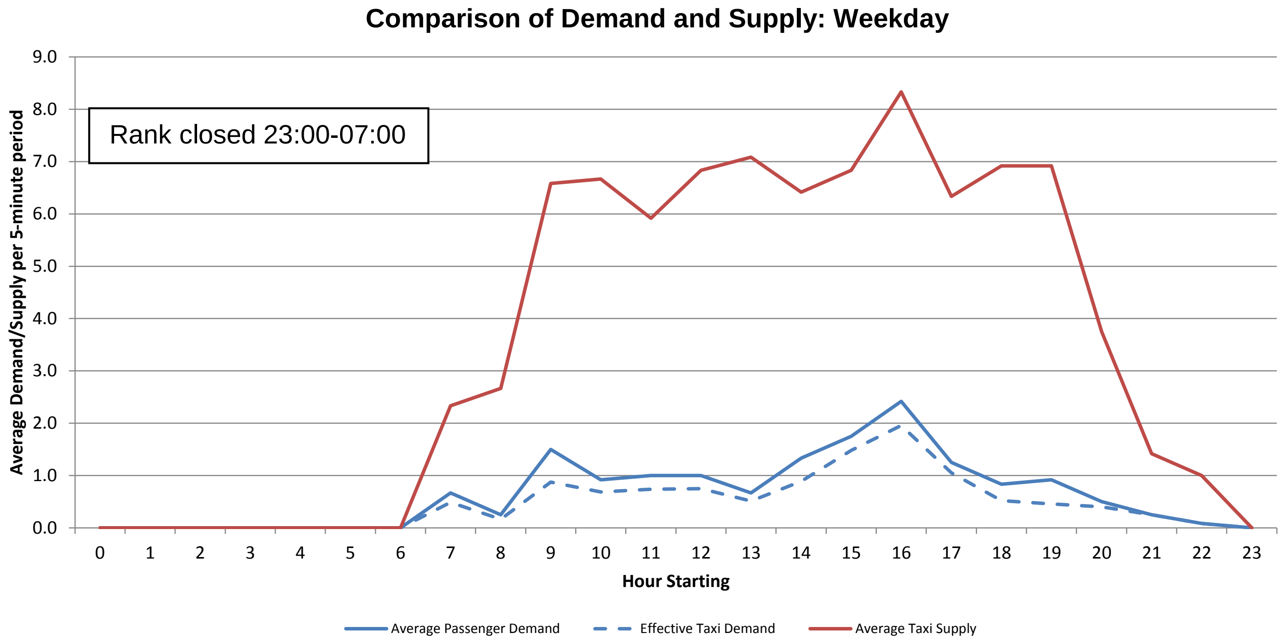
Havelock Street

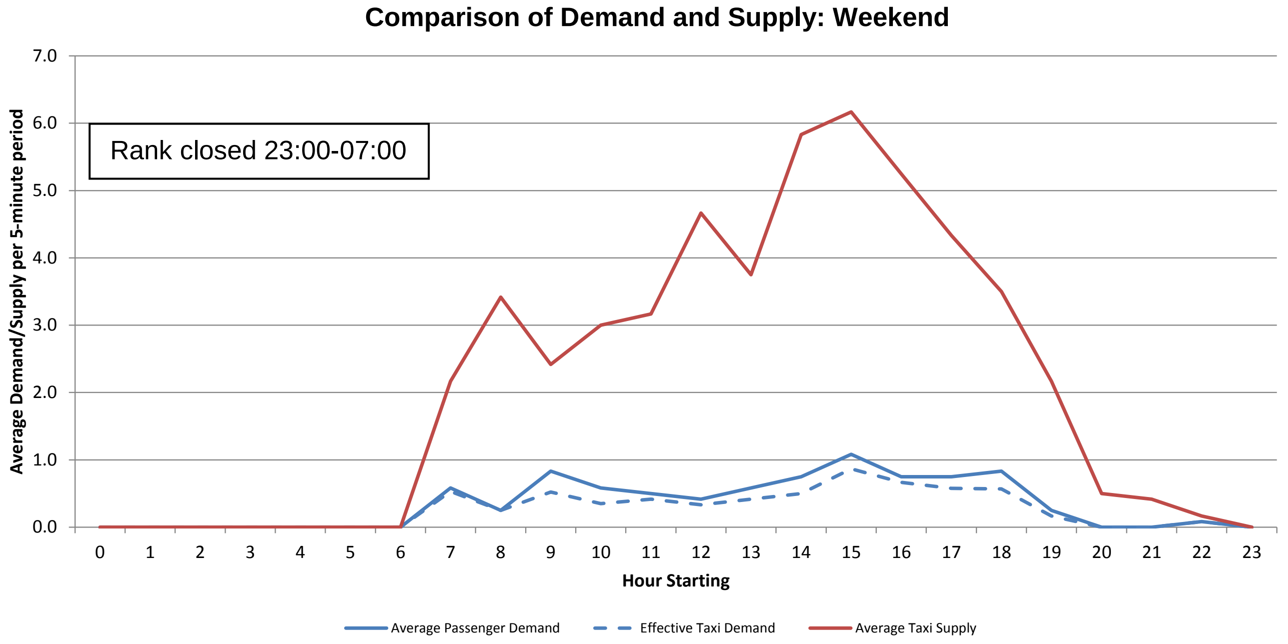


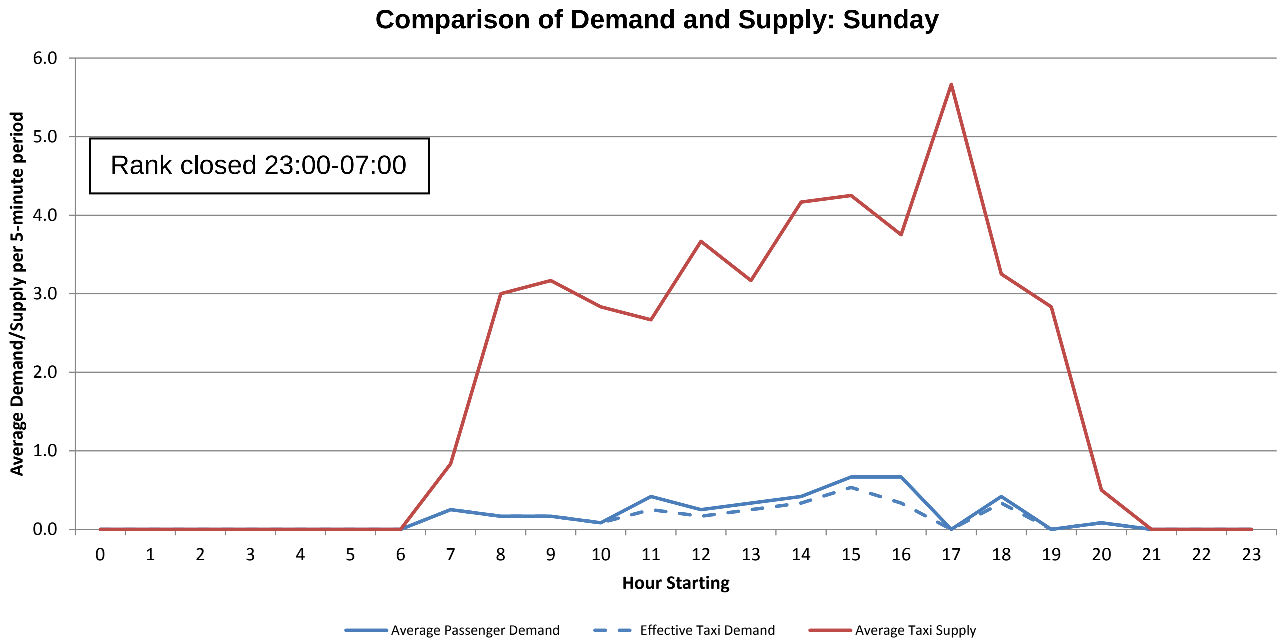




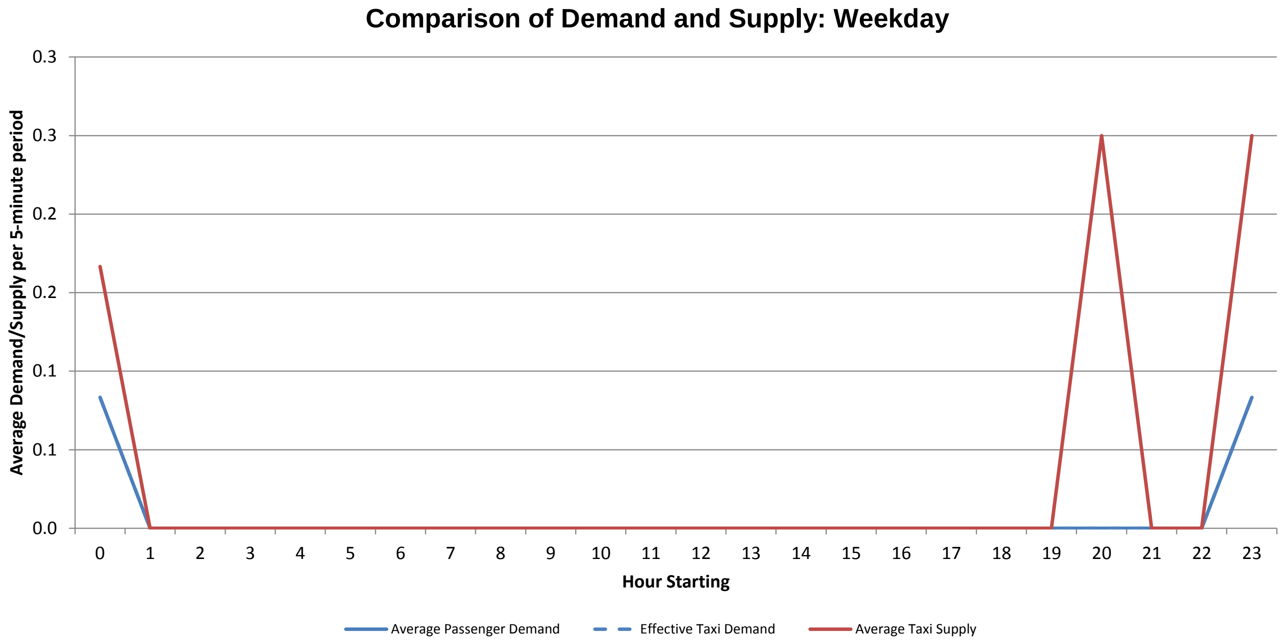
Heath Hospital

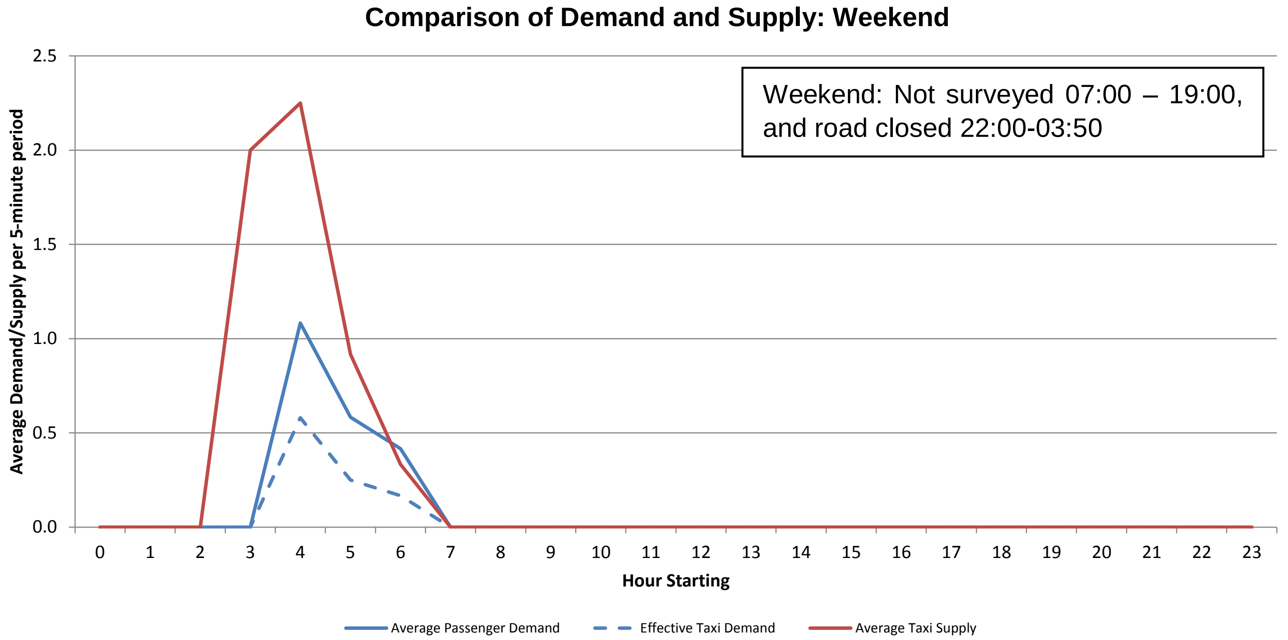


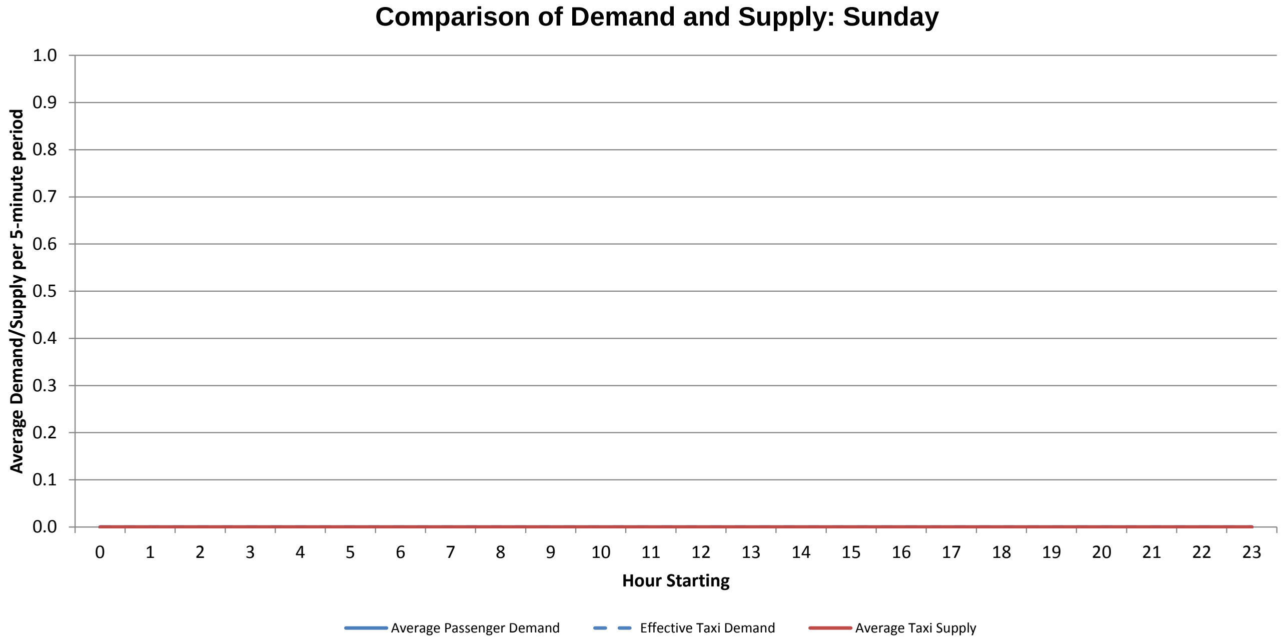




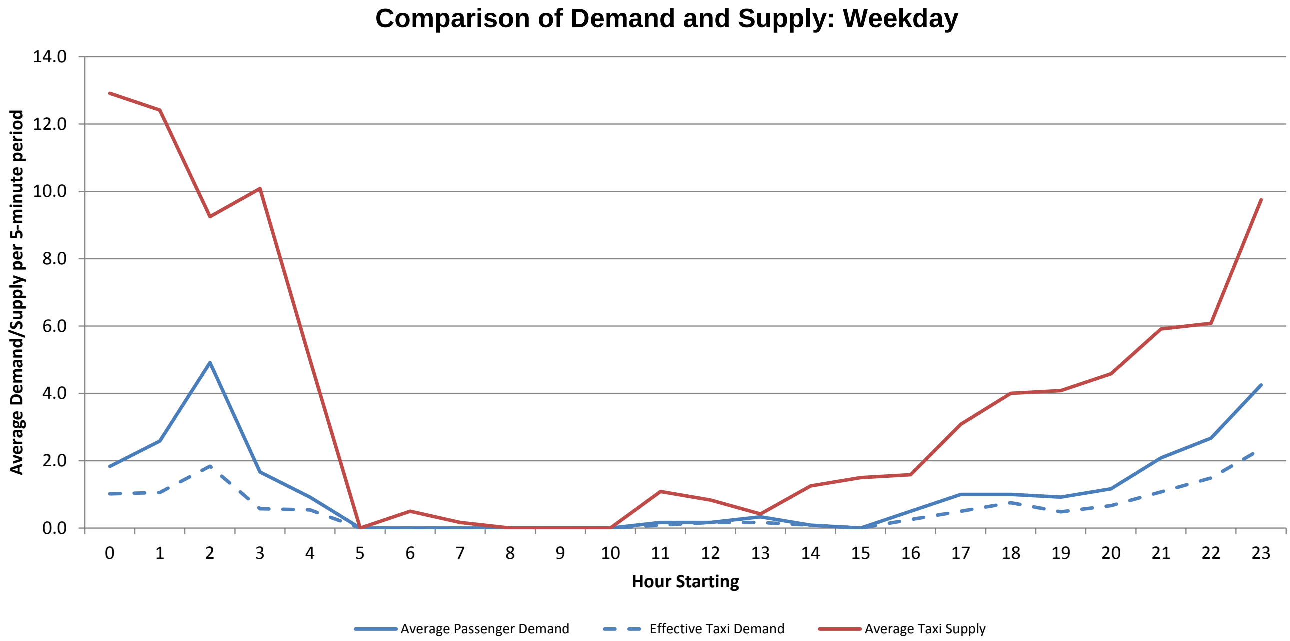
Lower St Mary Street (East)

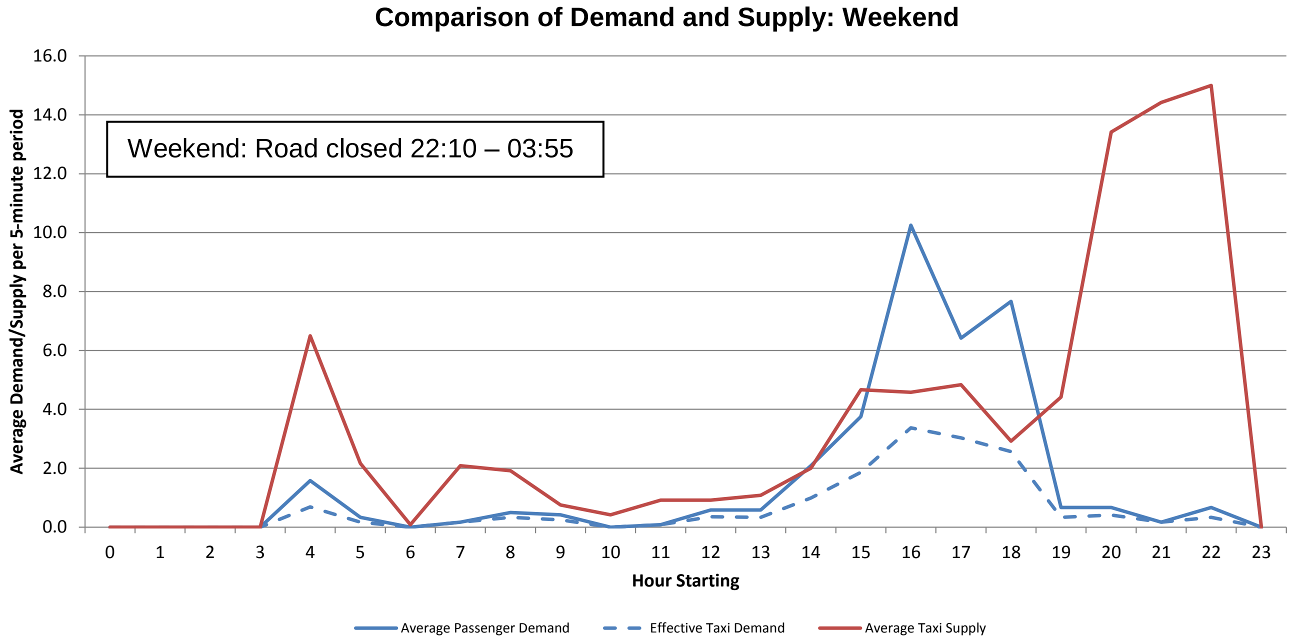


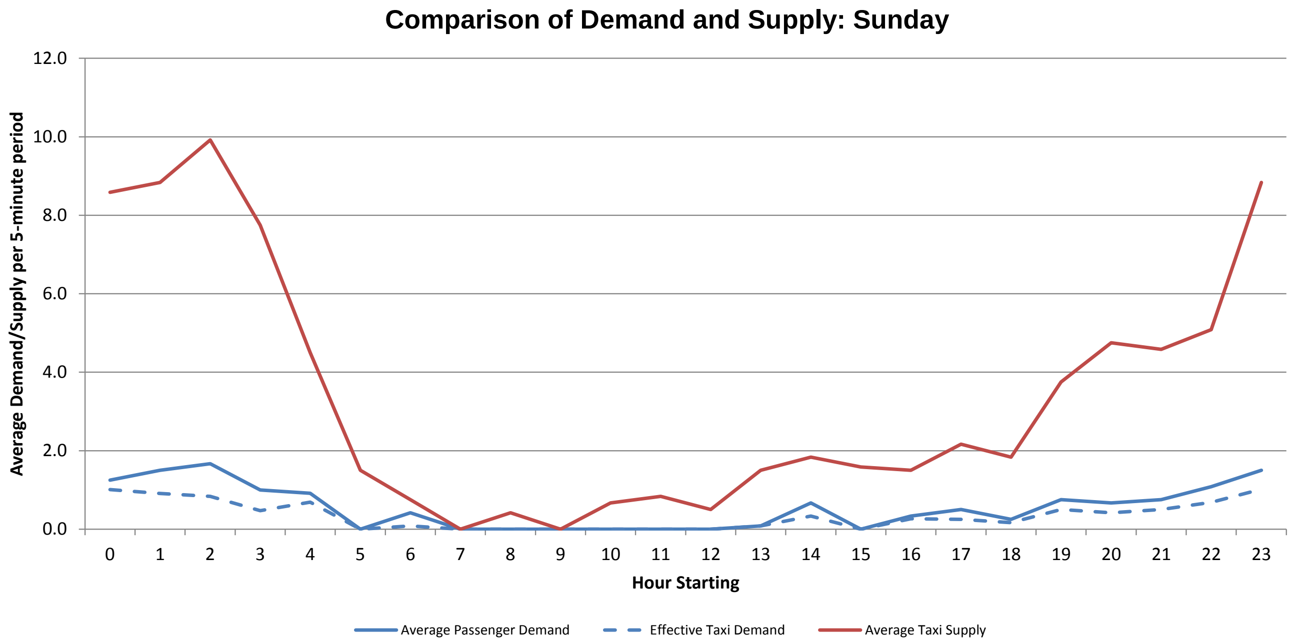




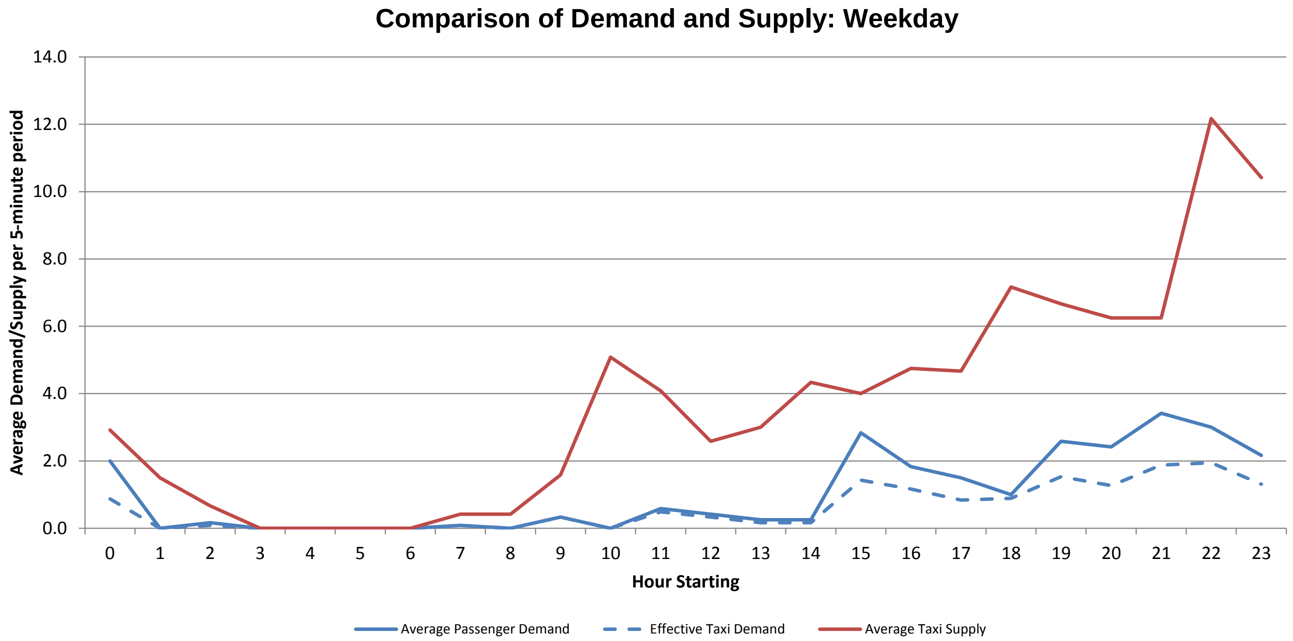
Lower St Mary Street (West)

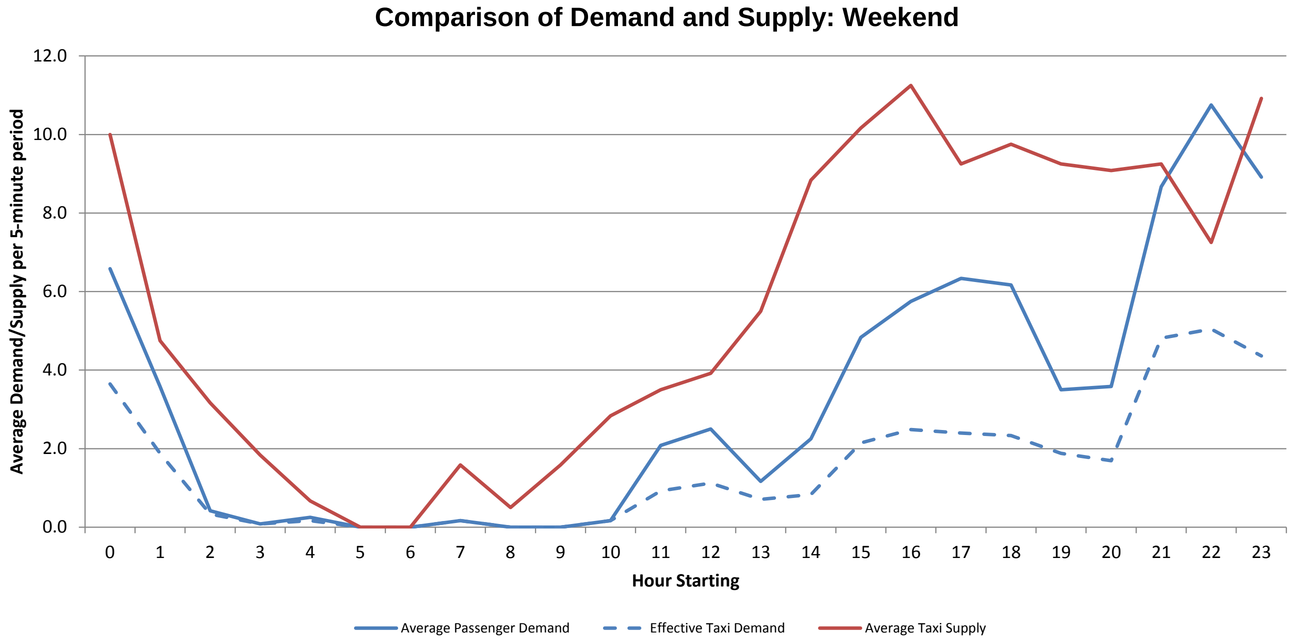


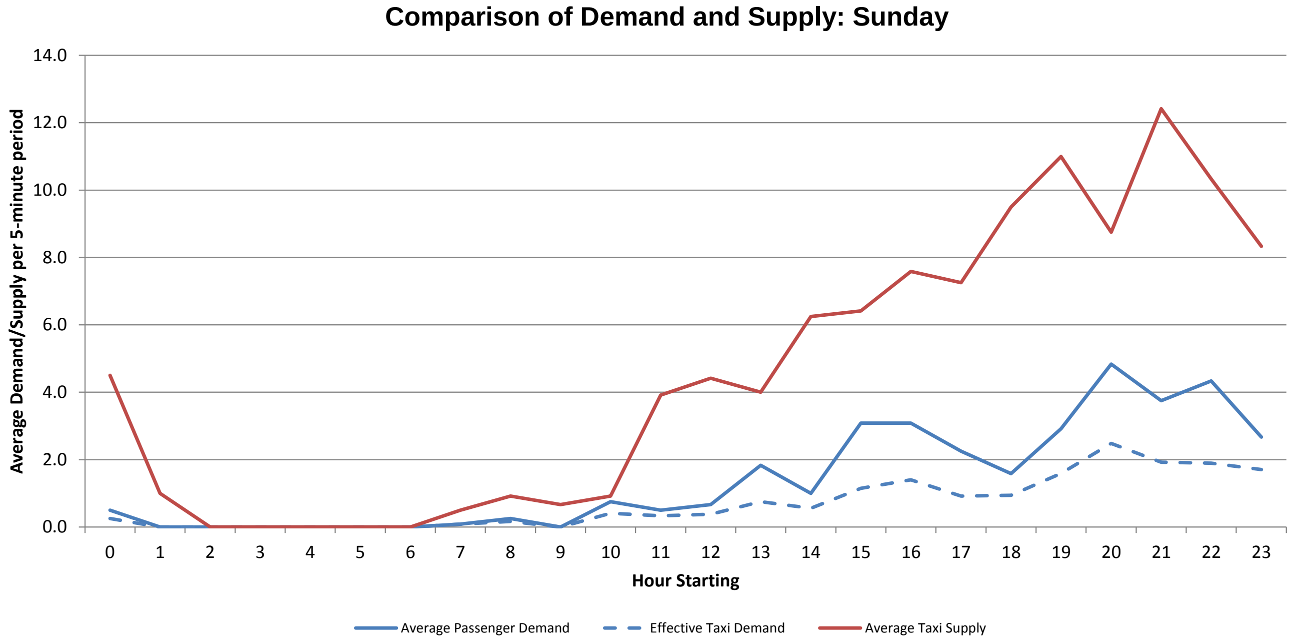




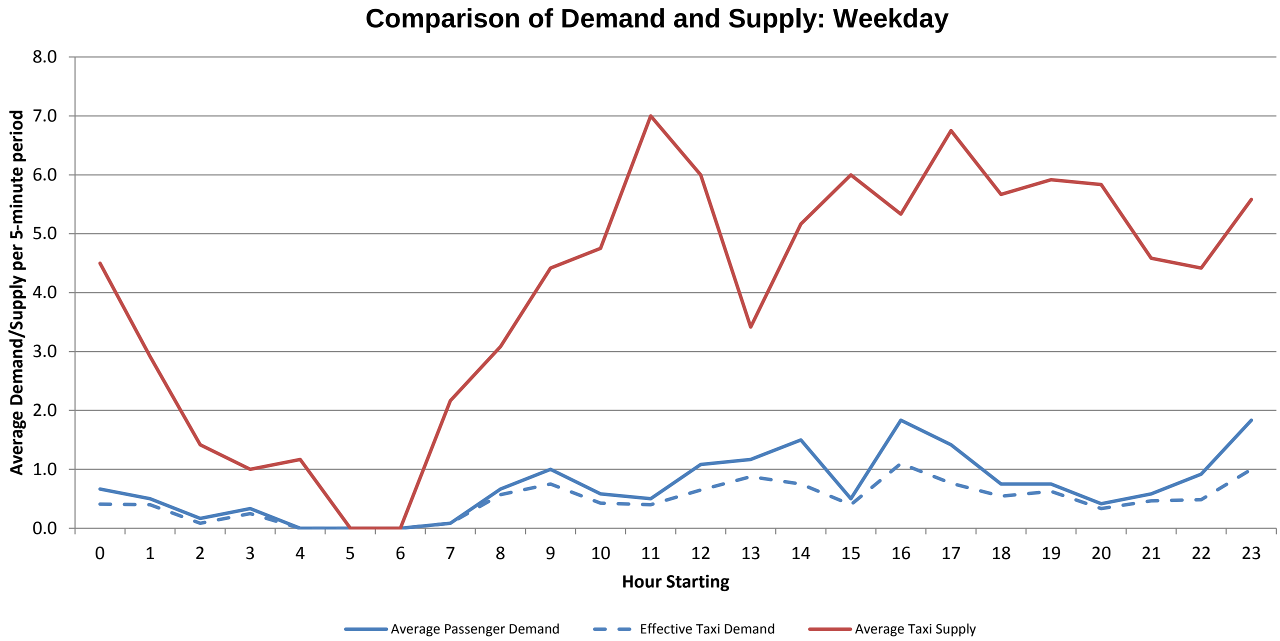
Mermaid Quay

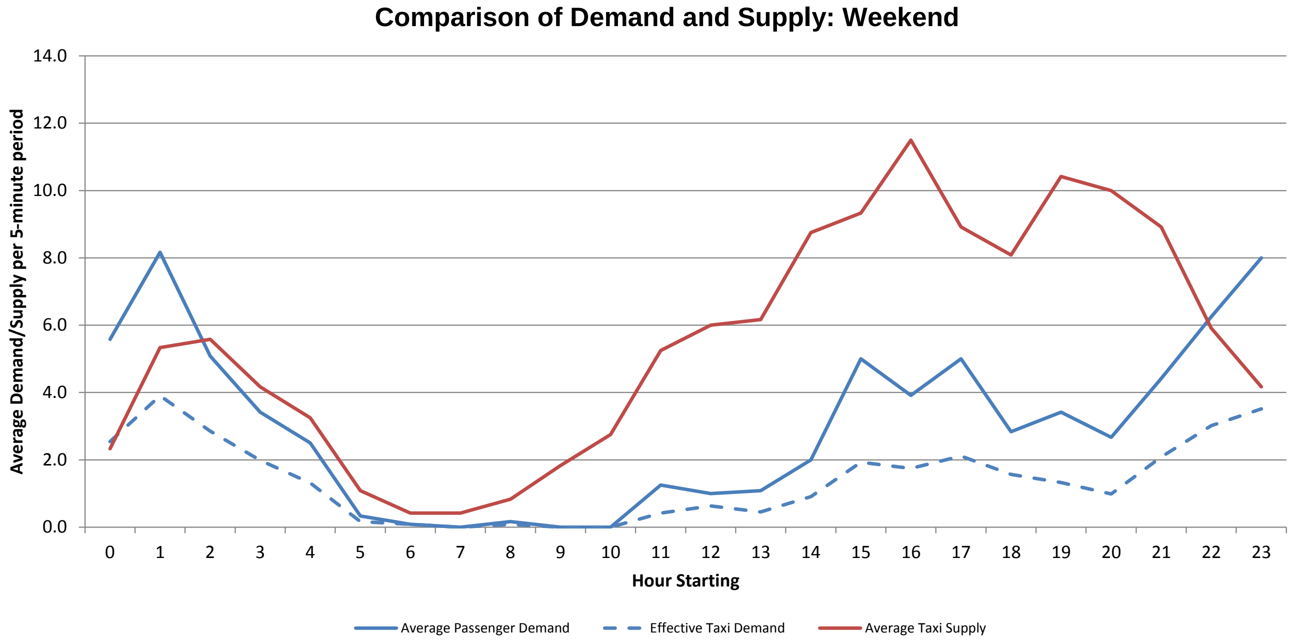


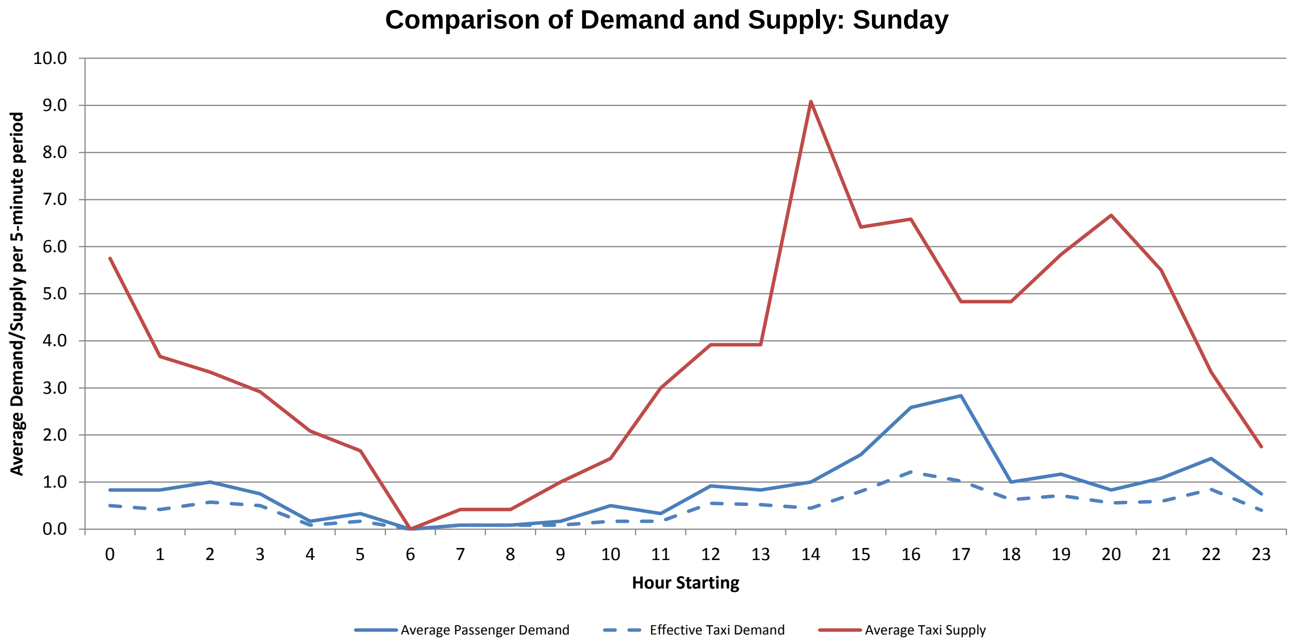




Mill Lane

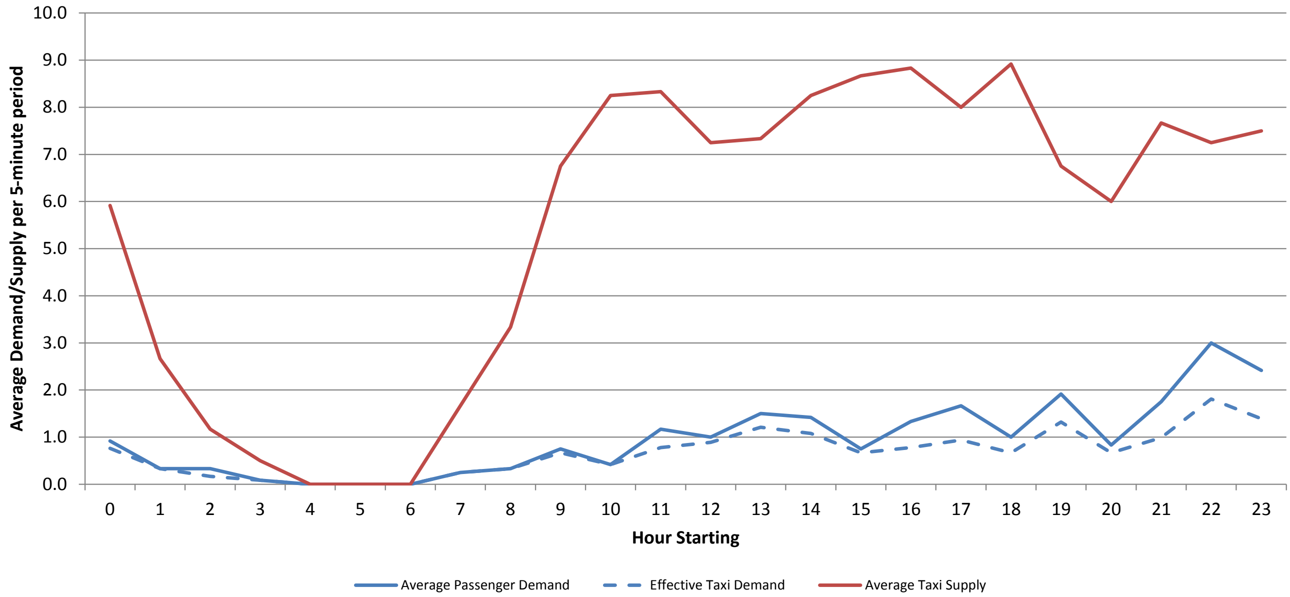

Comparison of Demand and Supply: Weekday
Average Demand/Supply per 5-minute period
8.0
7.0
6.0
5.0
4.0
3.0
2.0
1.0
0.0
0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23
Hour Starting
Average Passenger Demand
Effective Taxi Demand
Average Taxi Supply


Comparison of Demand and Supply: Weekend
Average Demand/Supply per 5-minute period
14.0
12.0
10.0
8.0
6.0
4.0
2.0
0.0
0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23
Hour Starting
Average Passenger Demand
Effective Taxi Demand
Average Taxi Supply

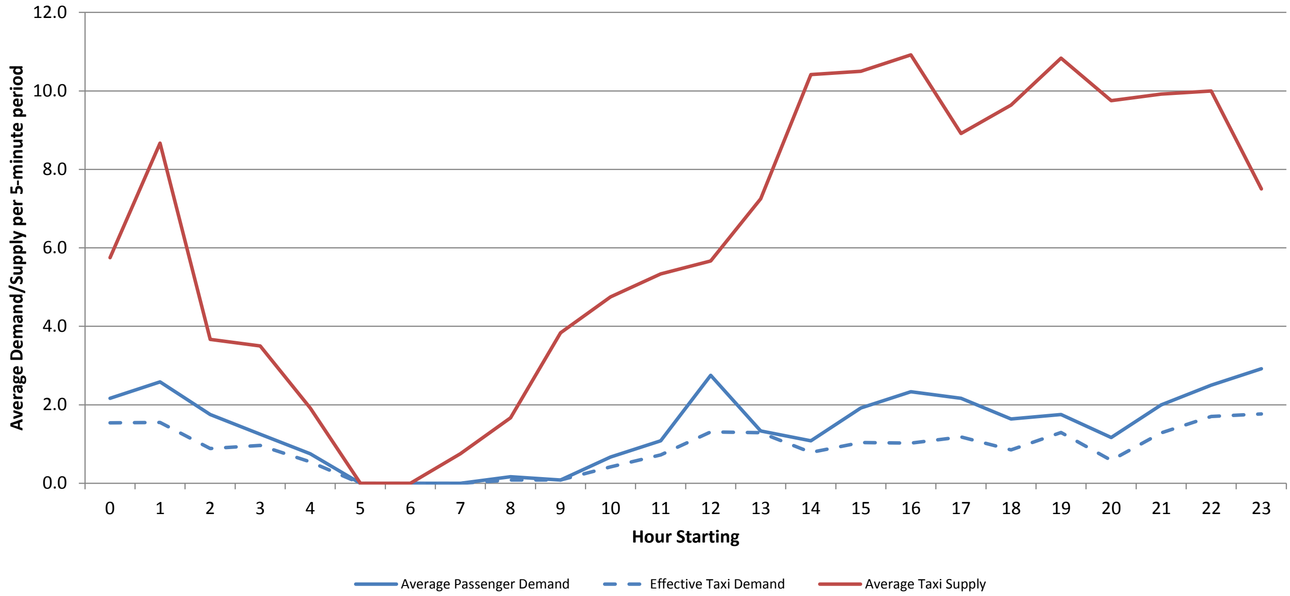

Comparison of Demand and Supply: Sunday
Average Demand/Supply per 5-minute period
10.0
9.0
8.0
7.0
6.0
5.0
4.0
3.0
2.0
1.0
0.0
0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23
Hour Starting
Average Passenger Demand
Effective Taxi Demand
Average Taxi Supply

Park Place

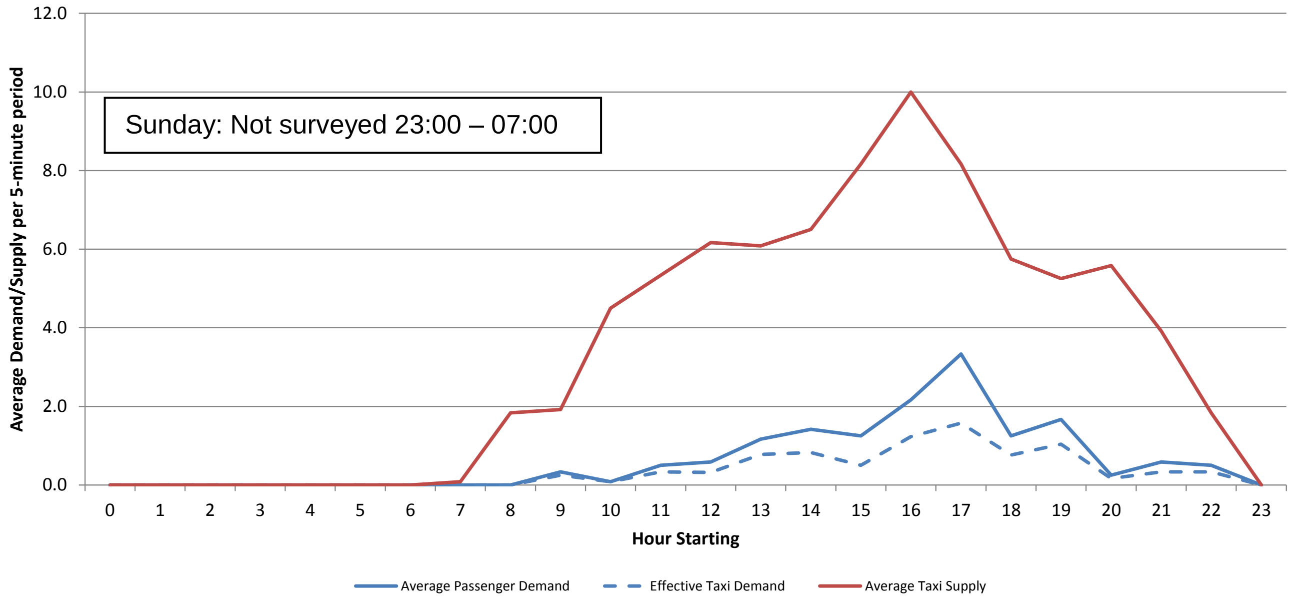
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

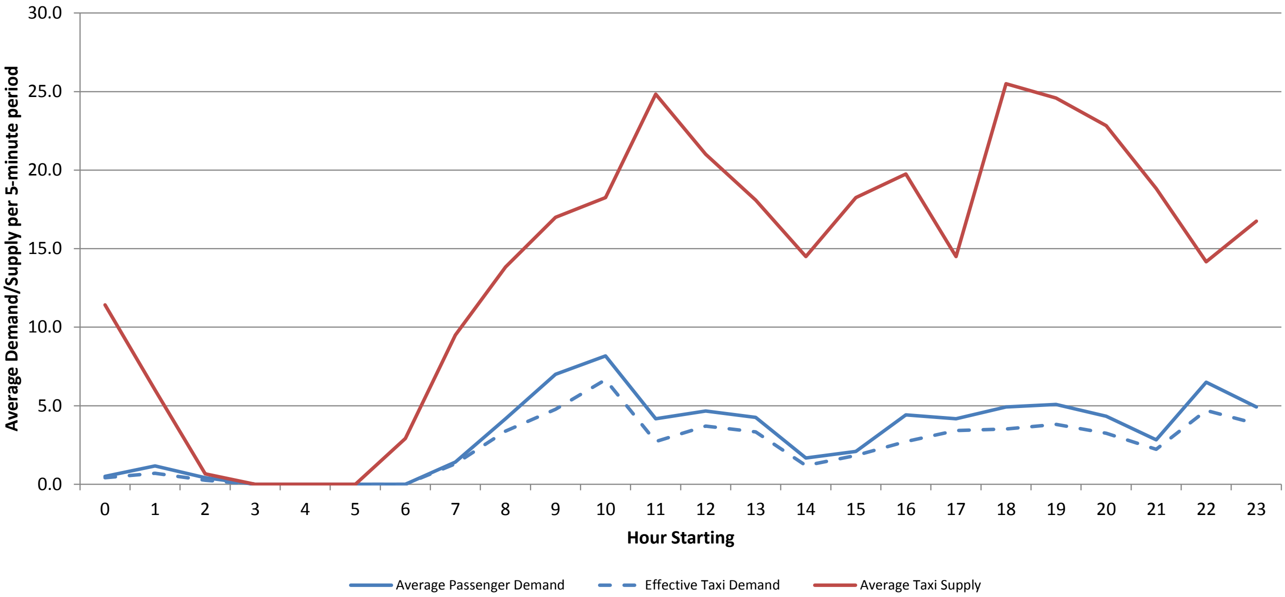


Comparison of Demand and Supply: Sunday

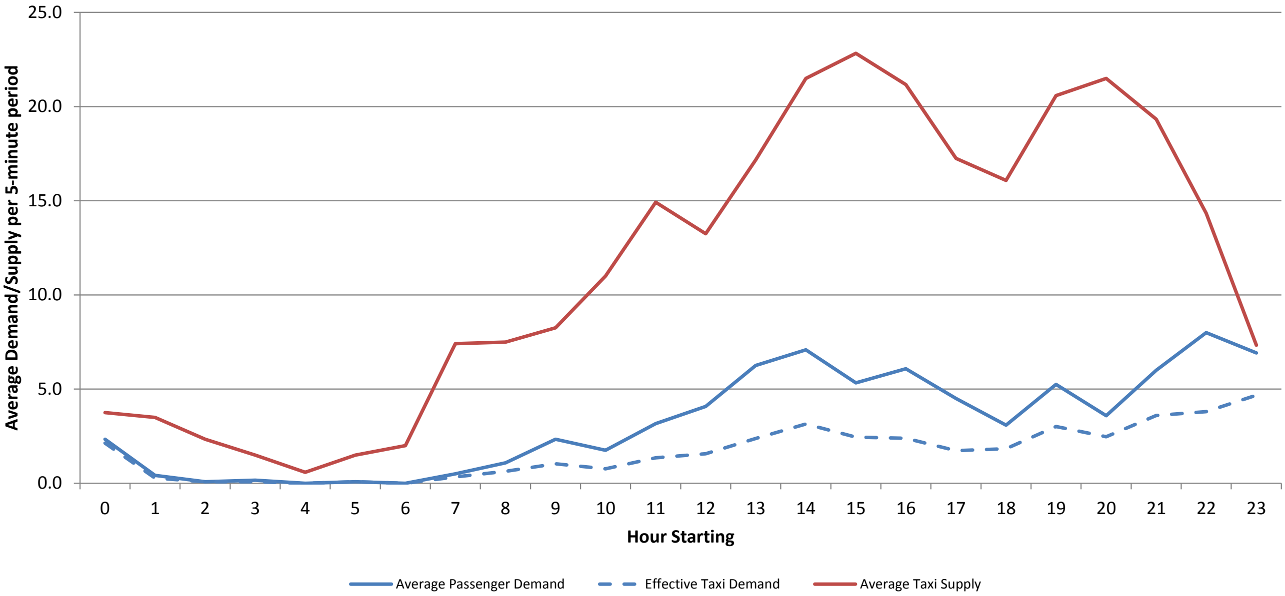


Saunders Road

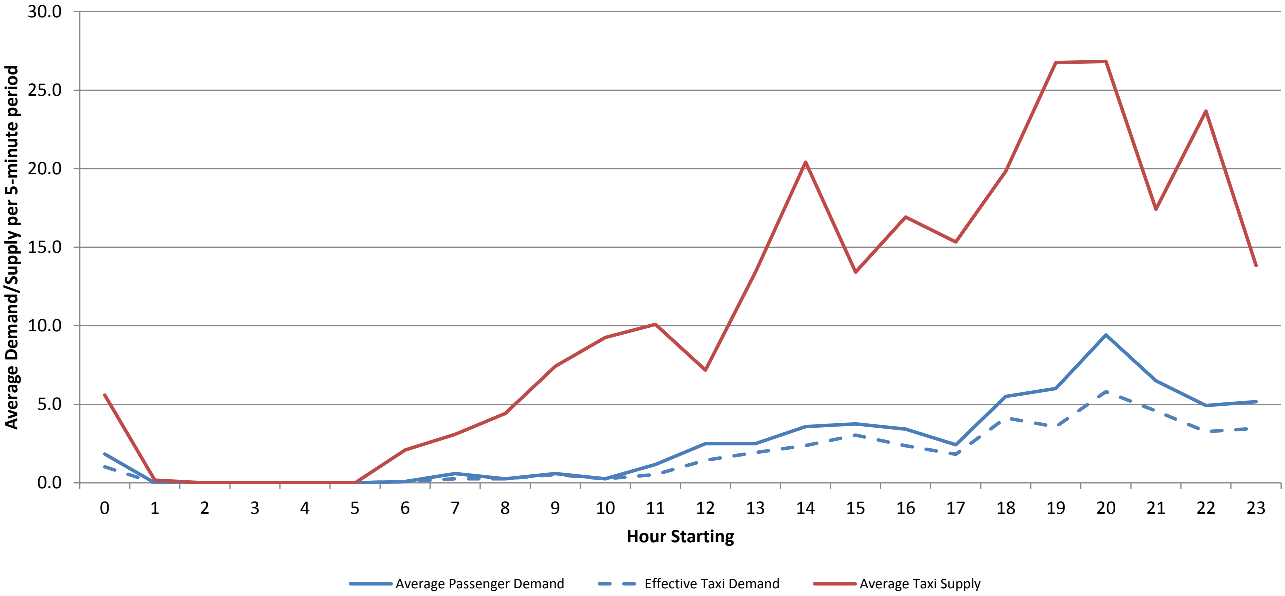
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

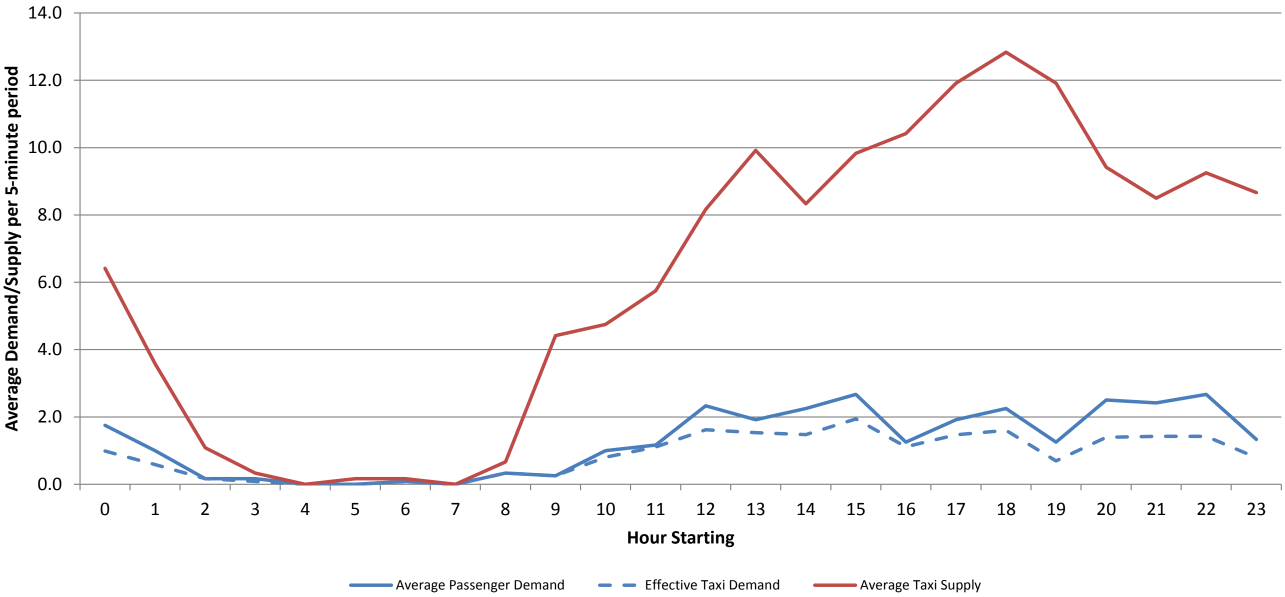


Comparison of Demand and Supply: Sunday

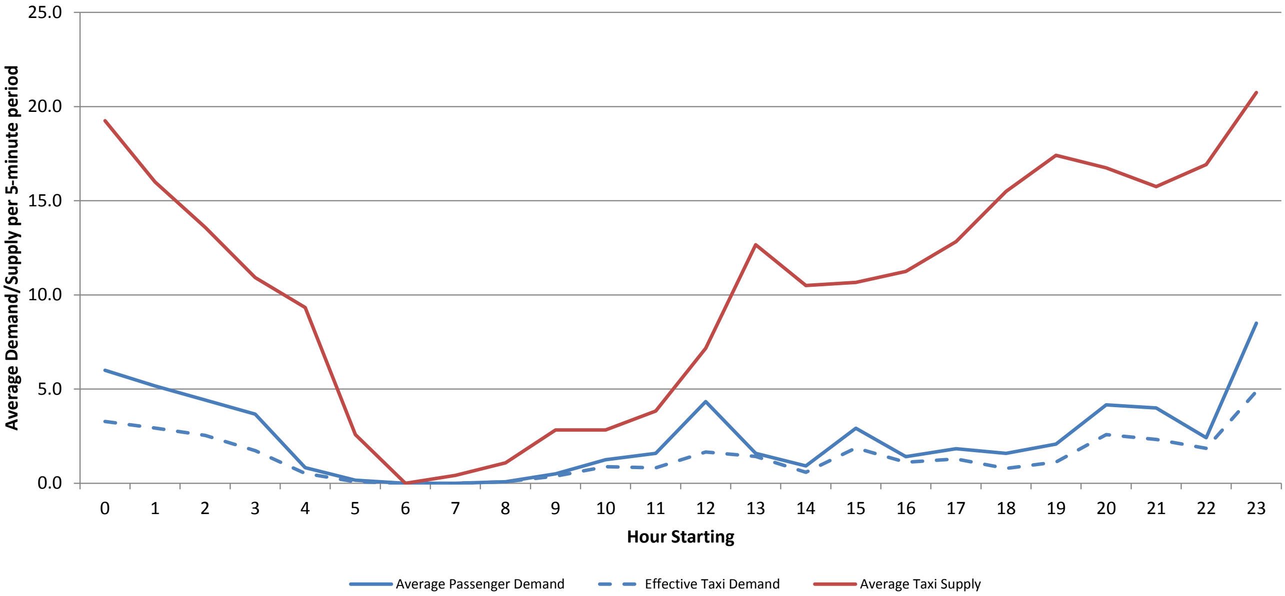


St Mary Street / Guildhall Place

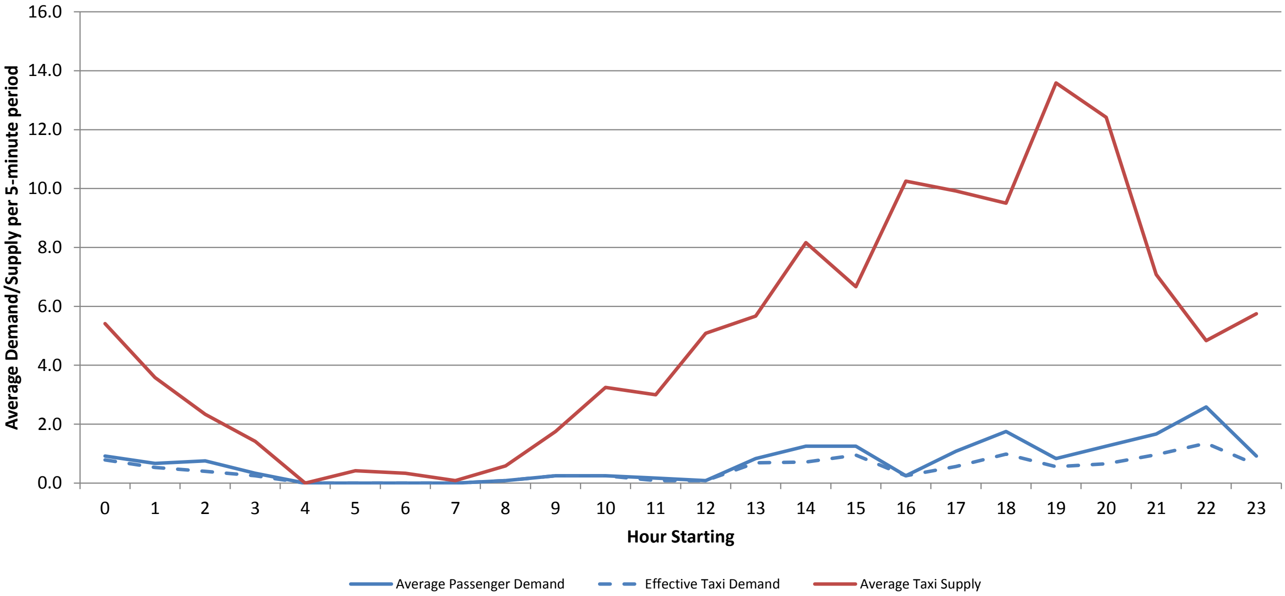
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

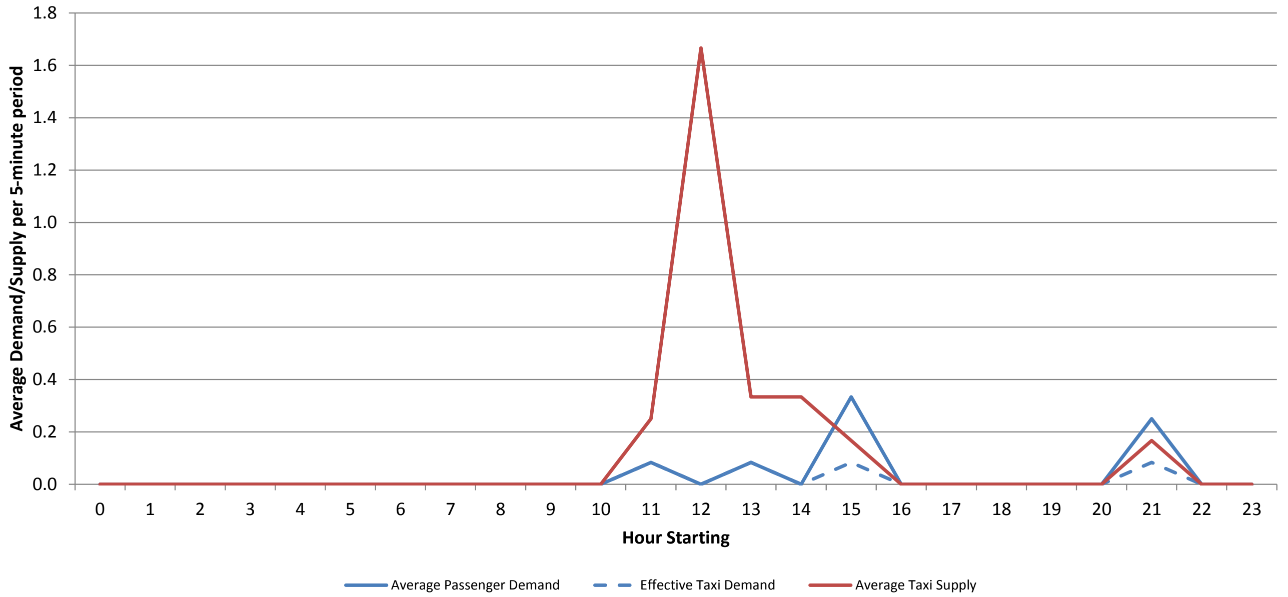


Comparison of Demand and Supply: Sunday

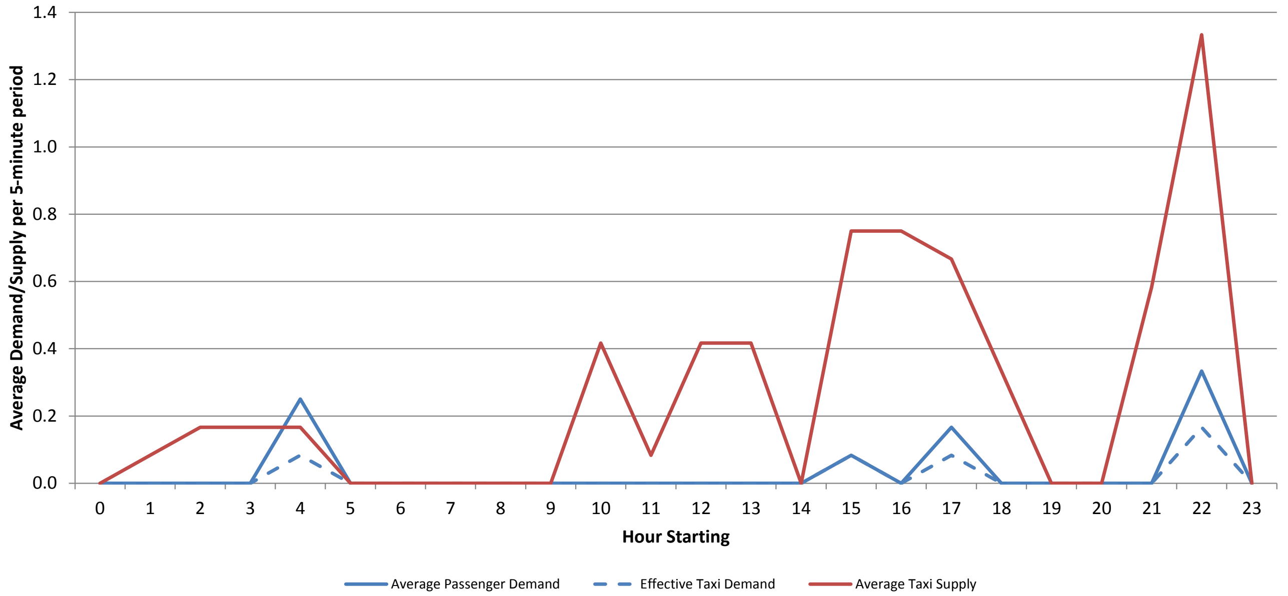


Tredegar Street

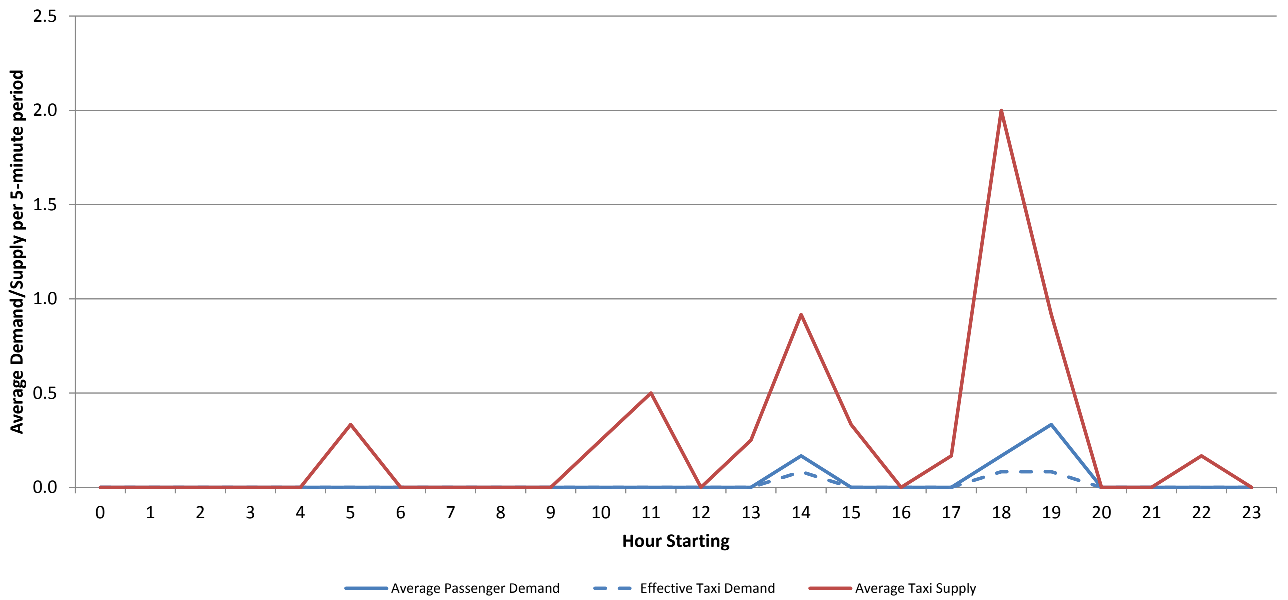
Comparison of Demand and Supply: Weekday



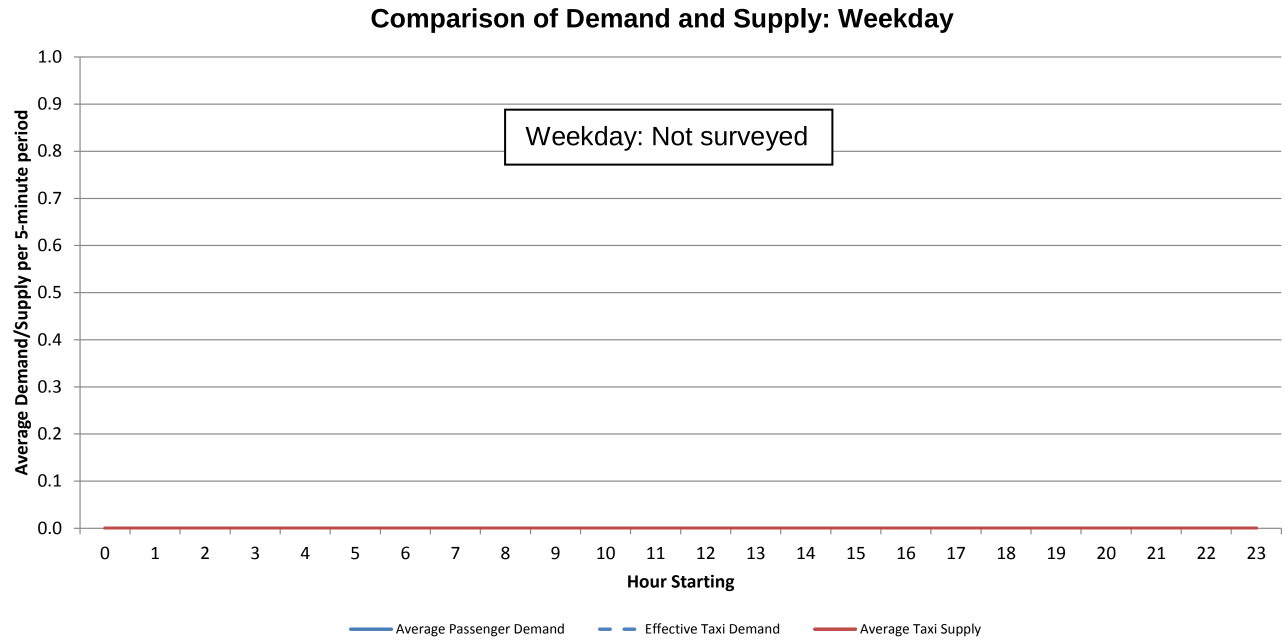
Comparison of Demand and Supply: Weekend

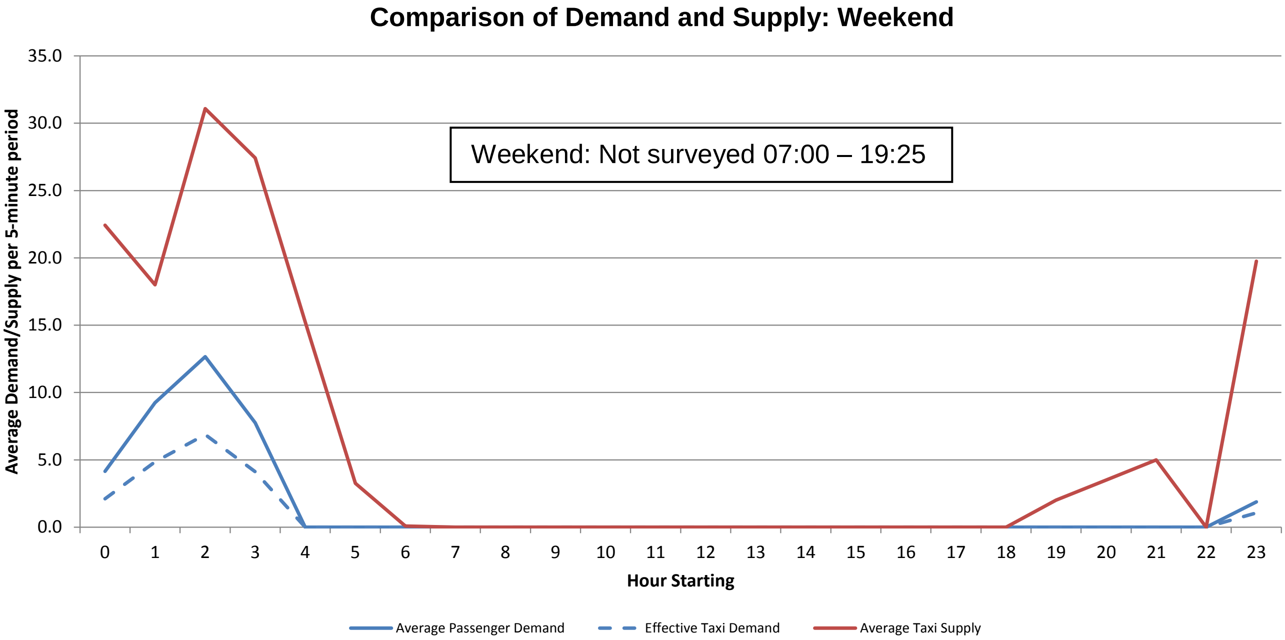


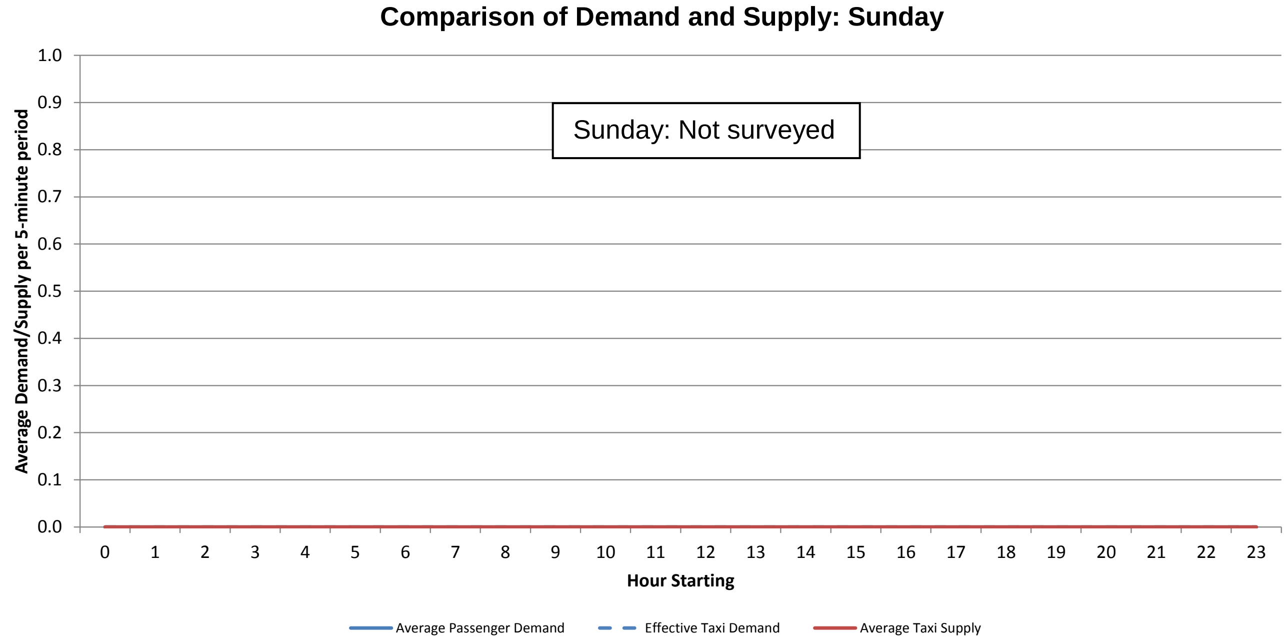
Comparison of Demand and Supply: Sunday



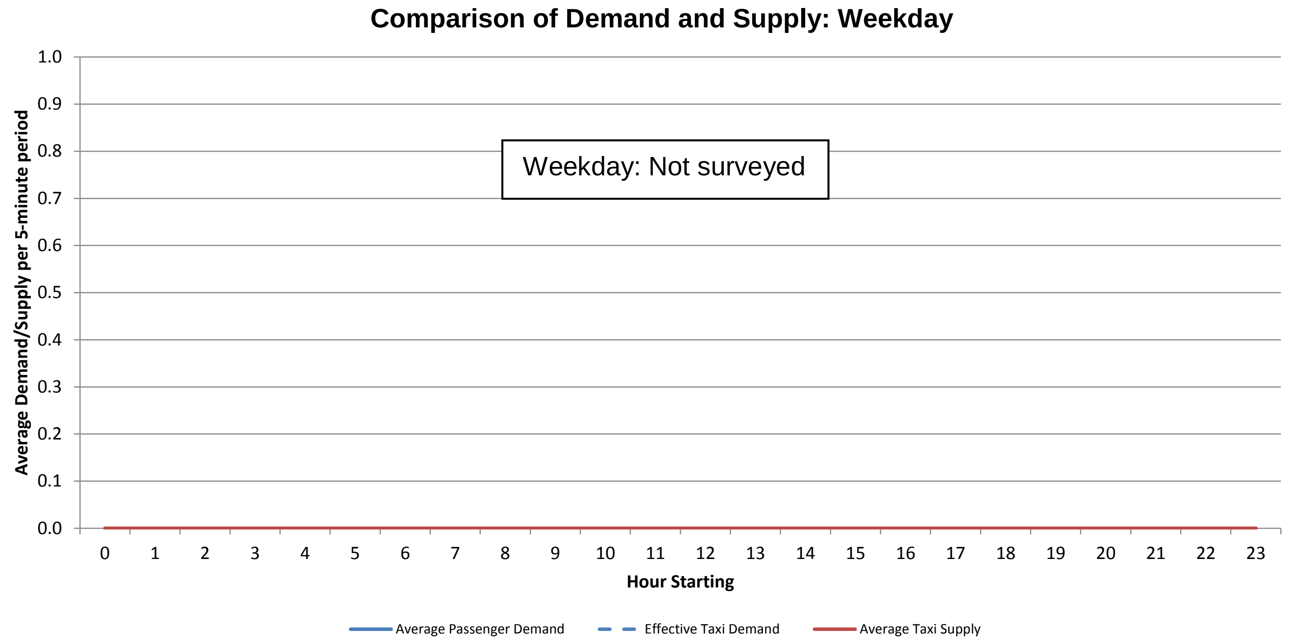
Duke Street / Castle Street

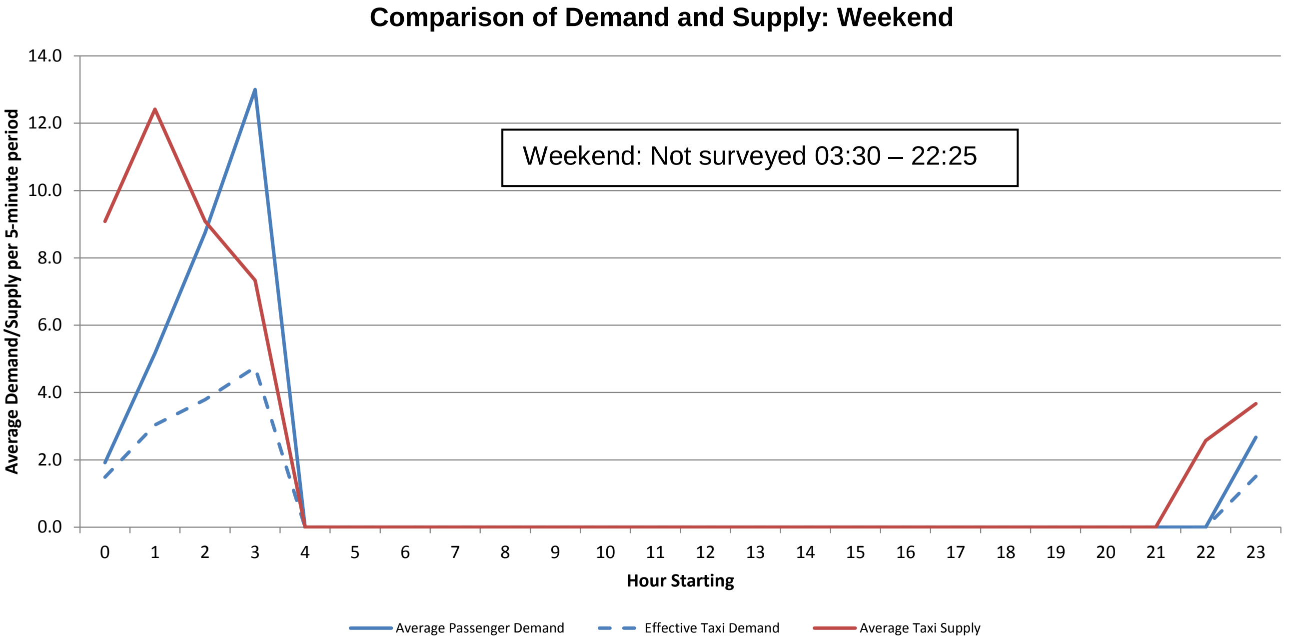


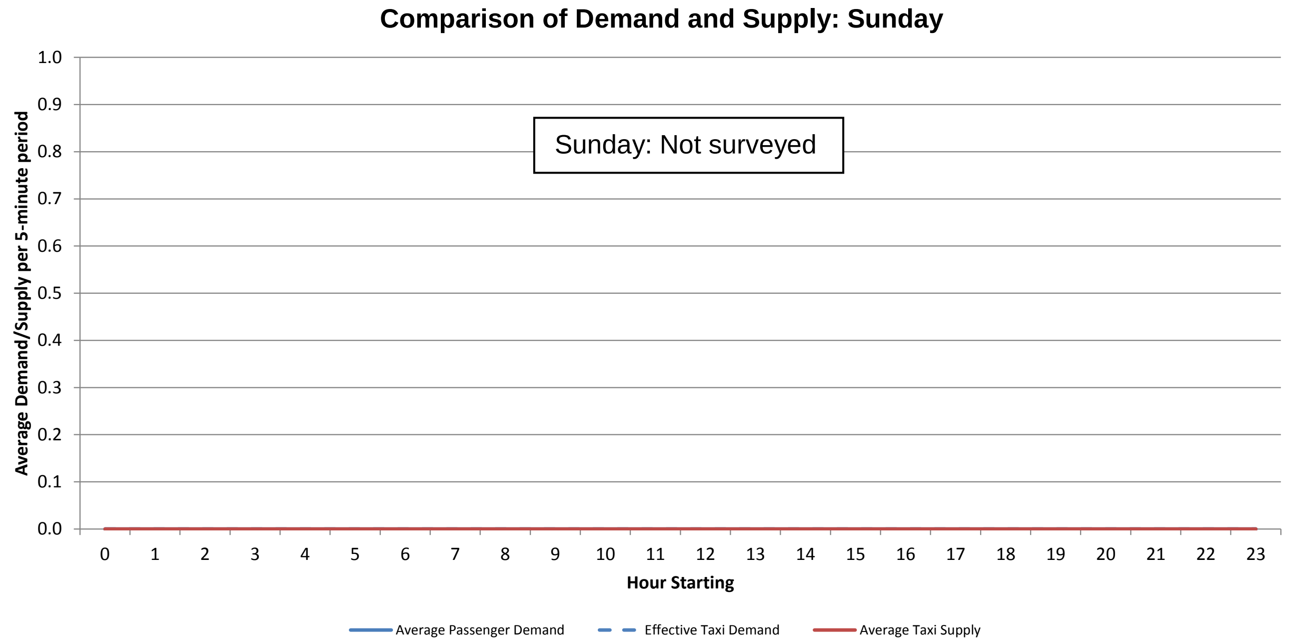




Greyfriars Road (Unofficial)

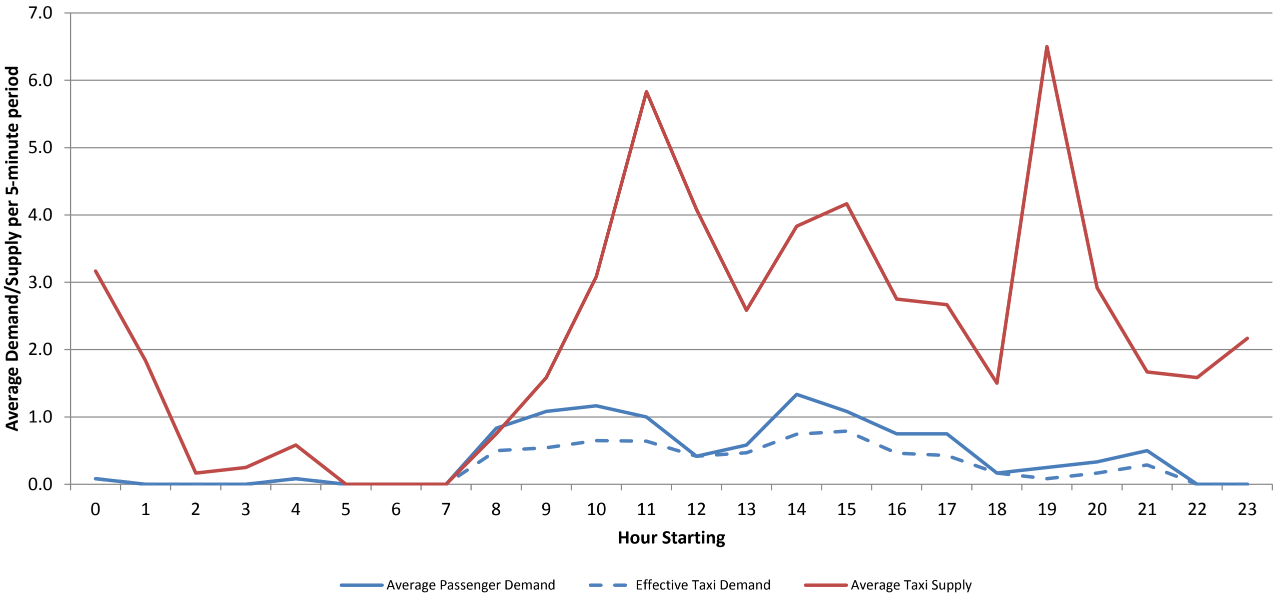




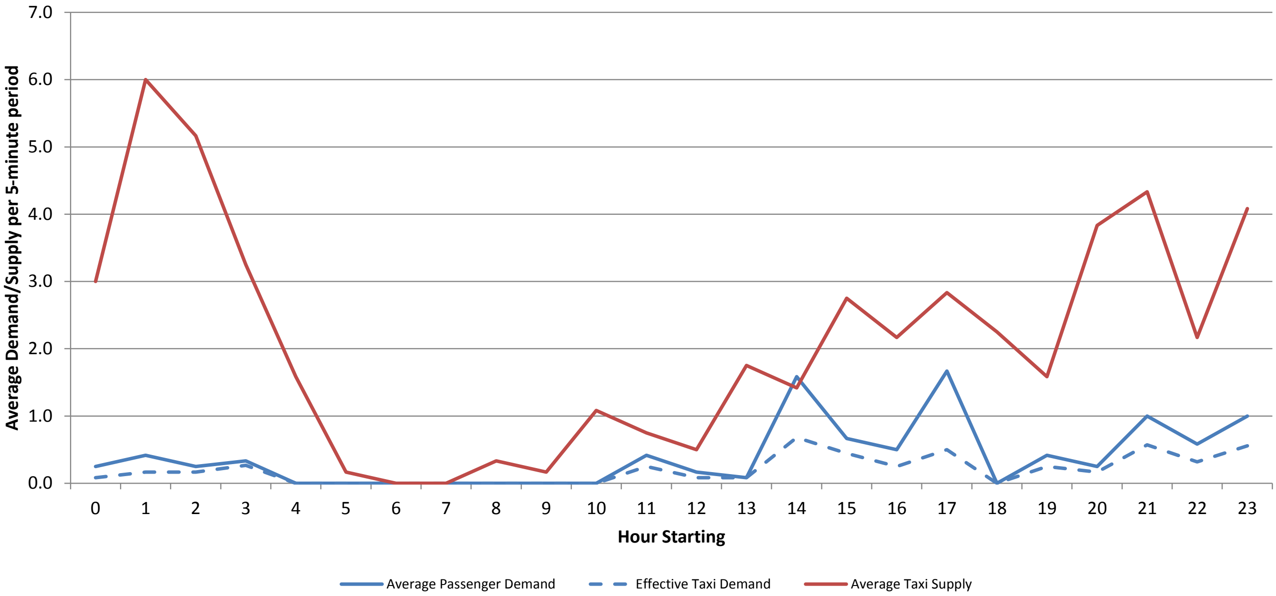


Sophia Gardens

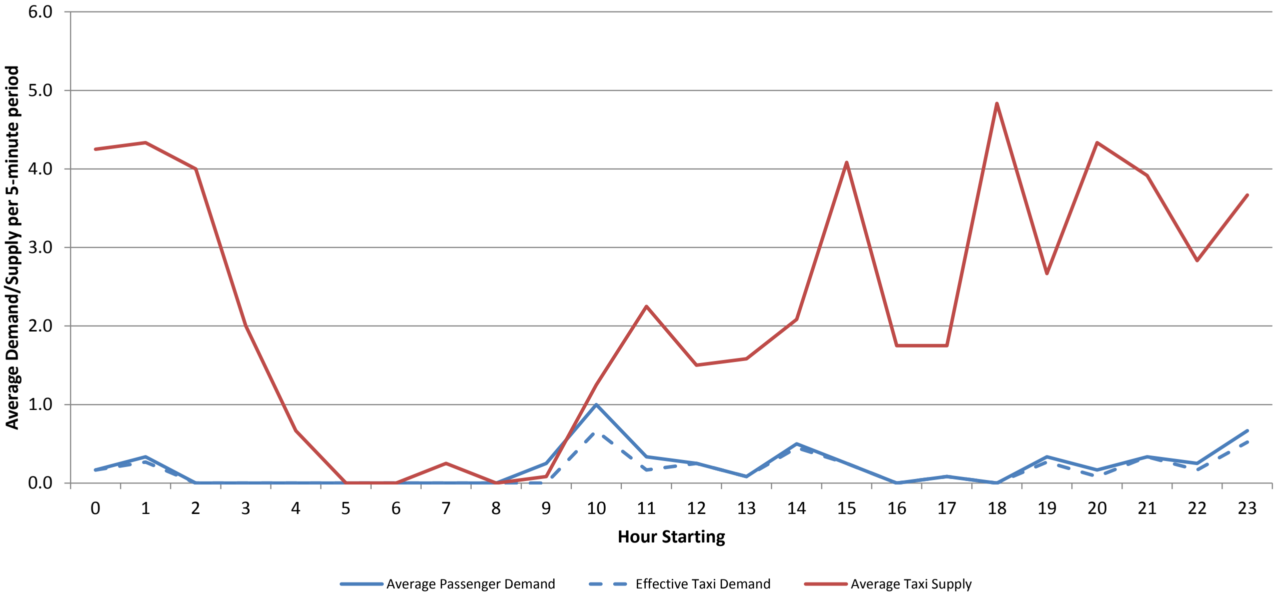
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

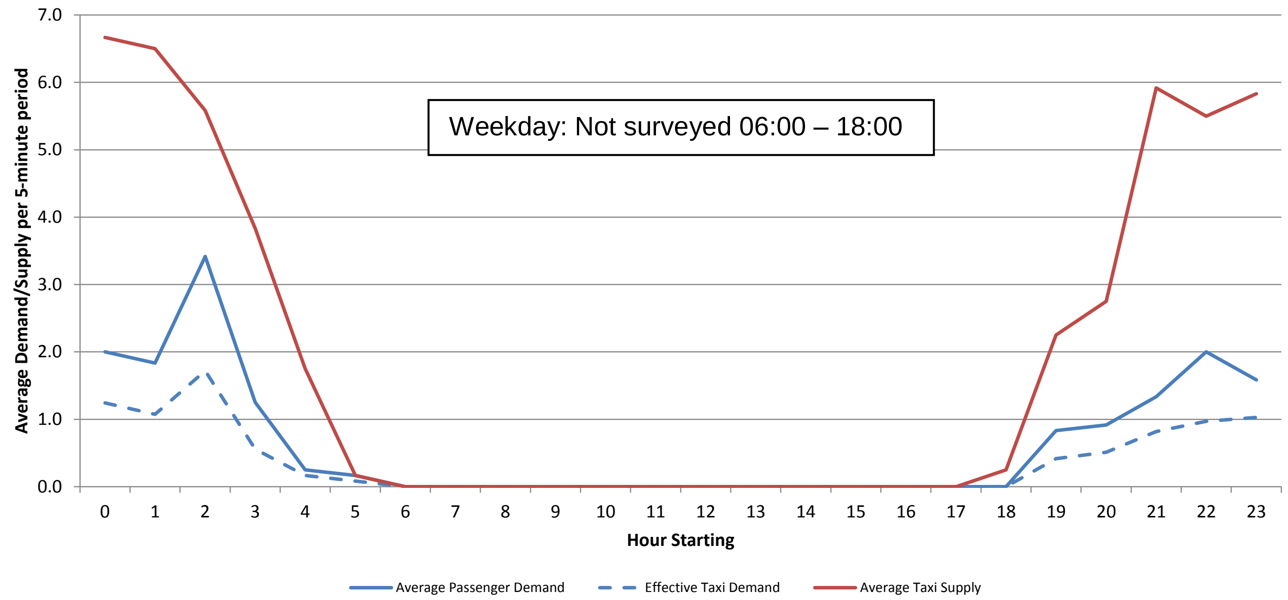


Comparison of Demand and Supply: Sunday

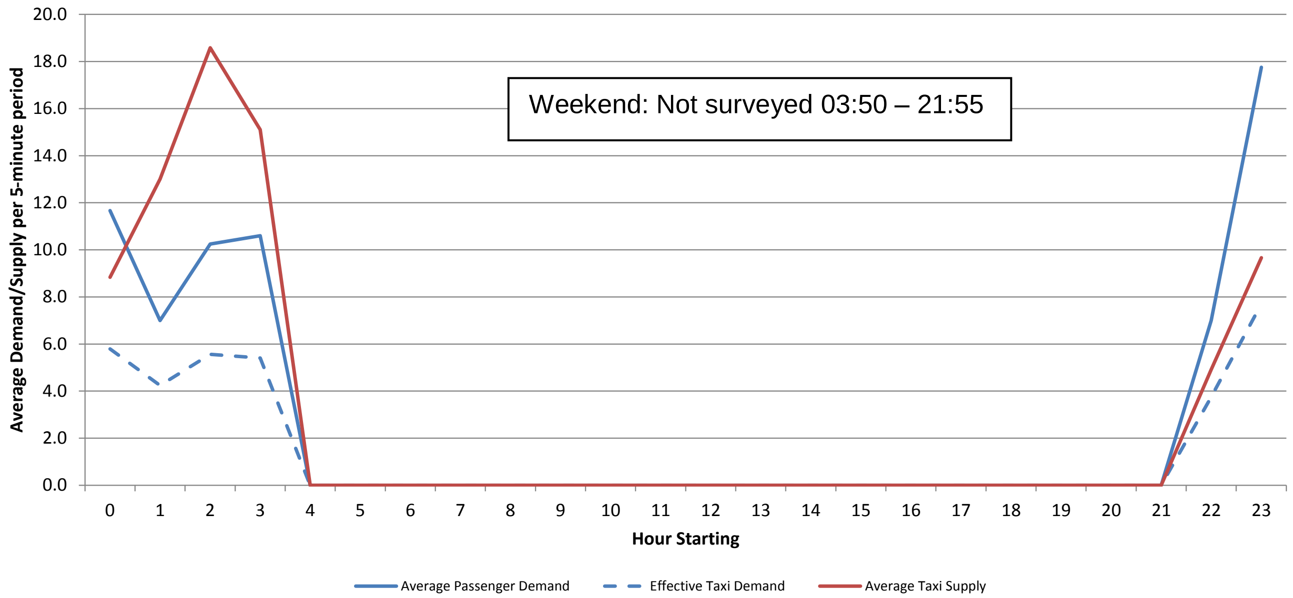


St Mary Street (Unofficial)

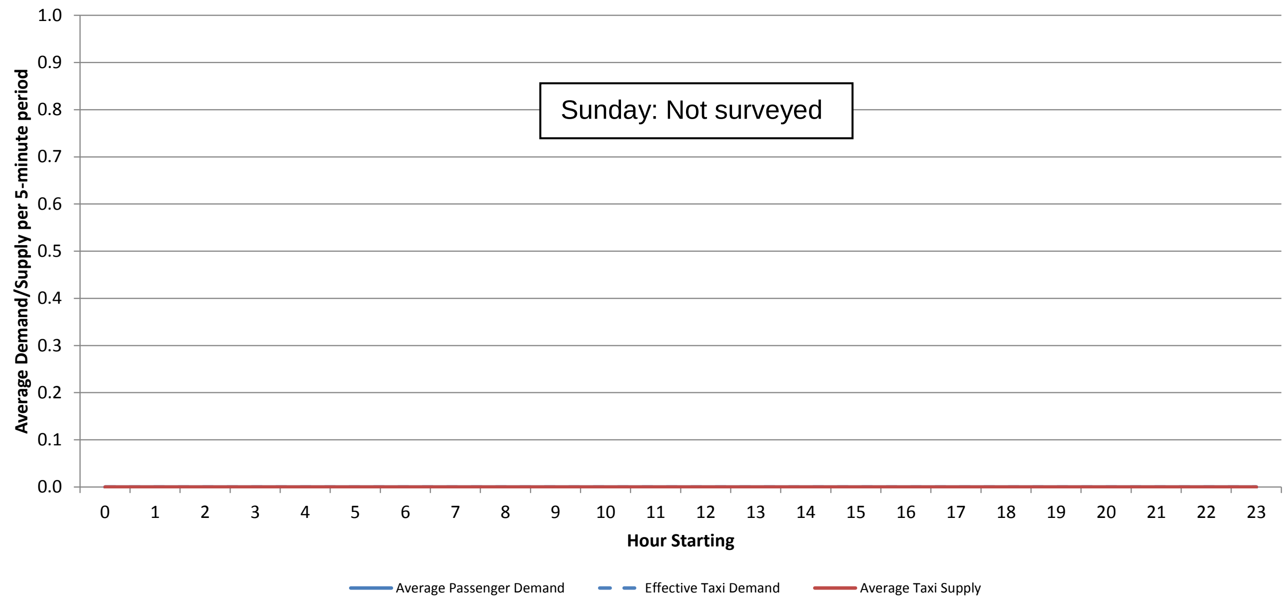
Comparison of Demand and Supply: Weekday



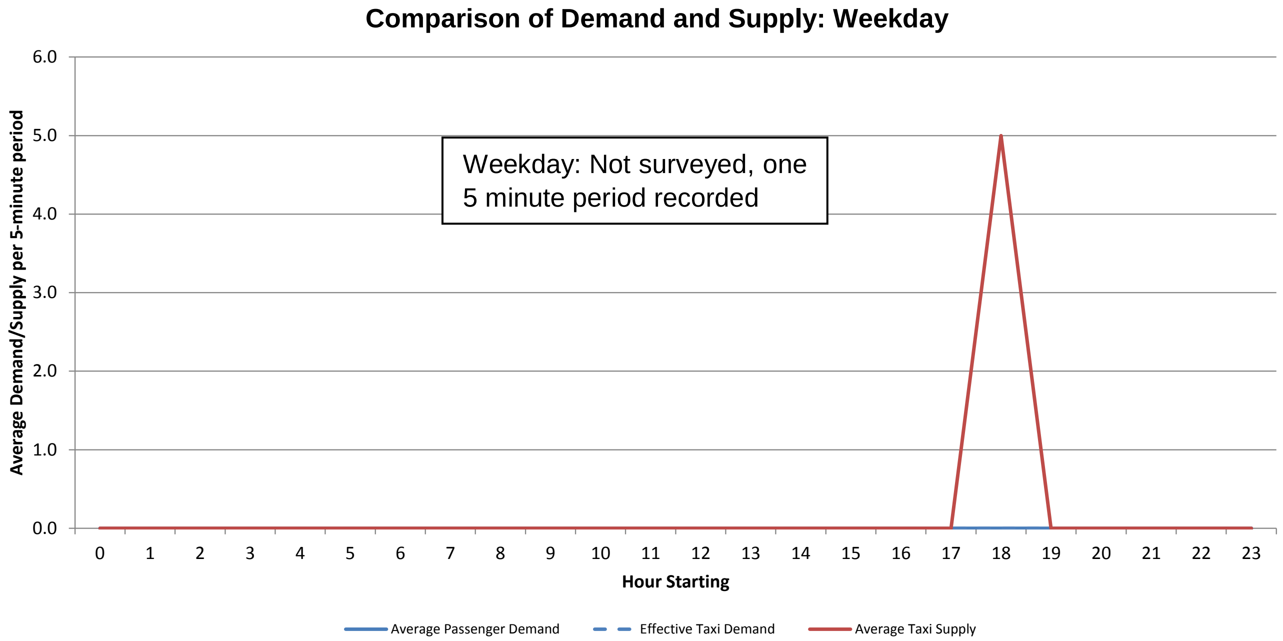
Comparison of Demand and Supply: Weekend

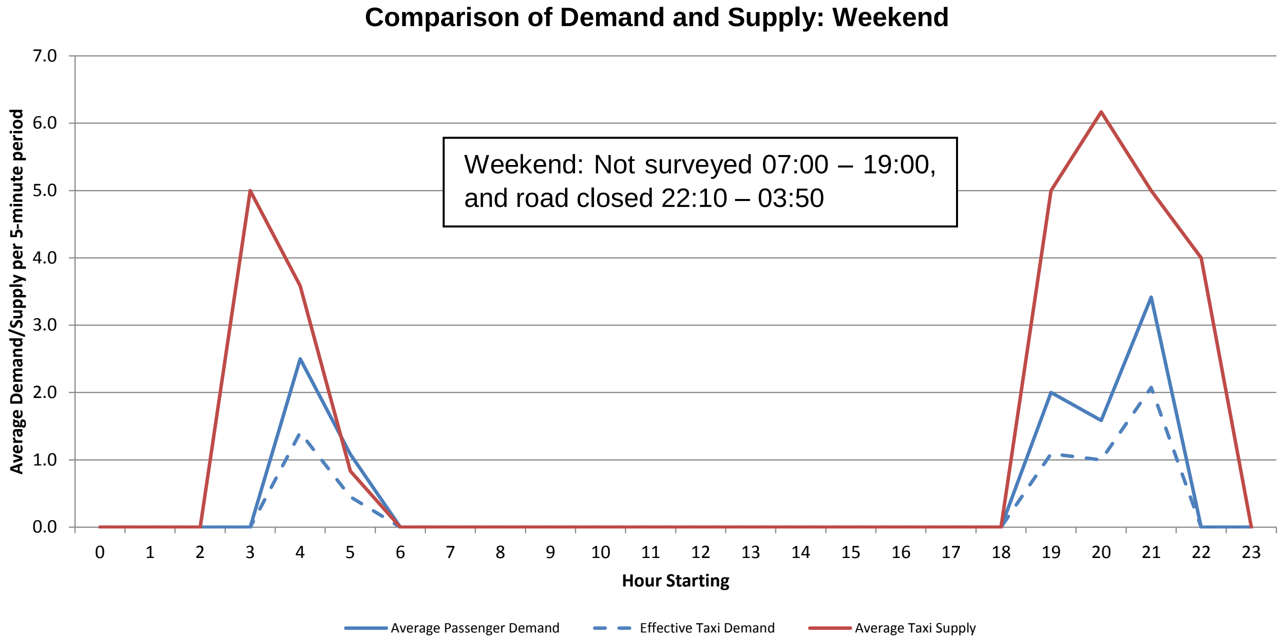


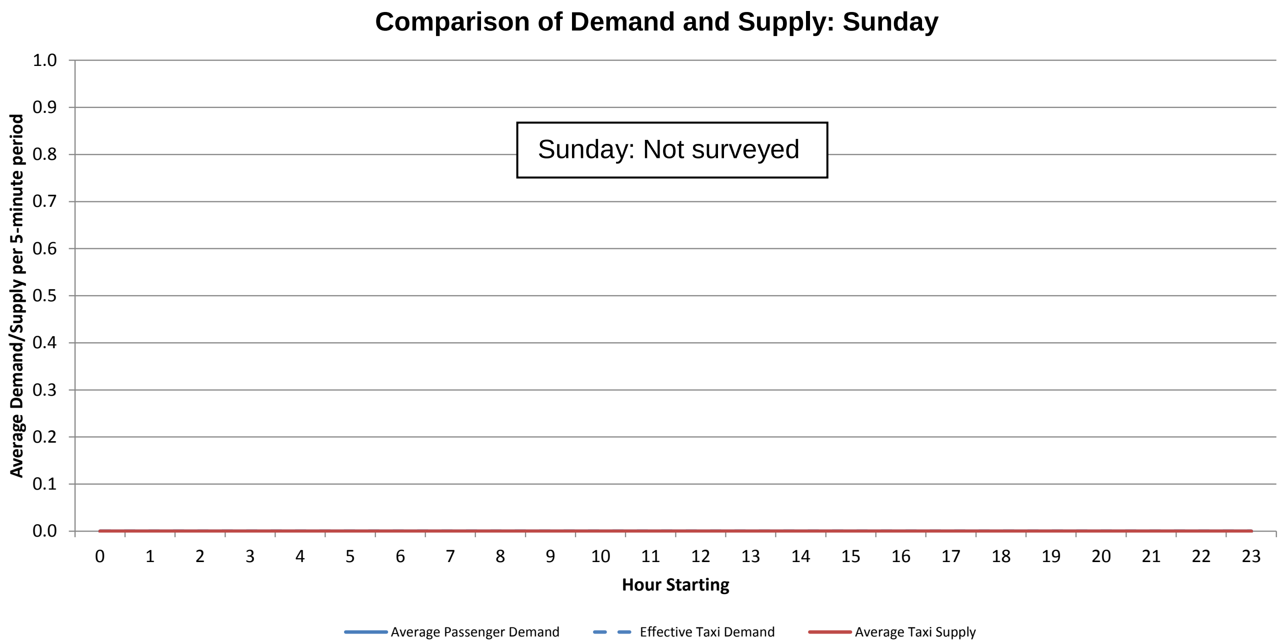
Comparison of Demand and Supply: Sunday



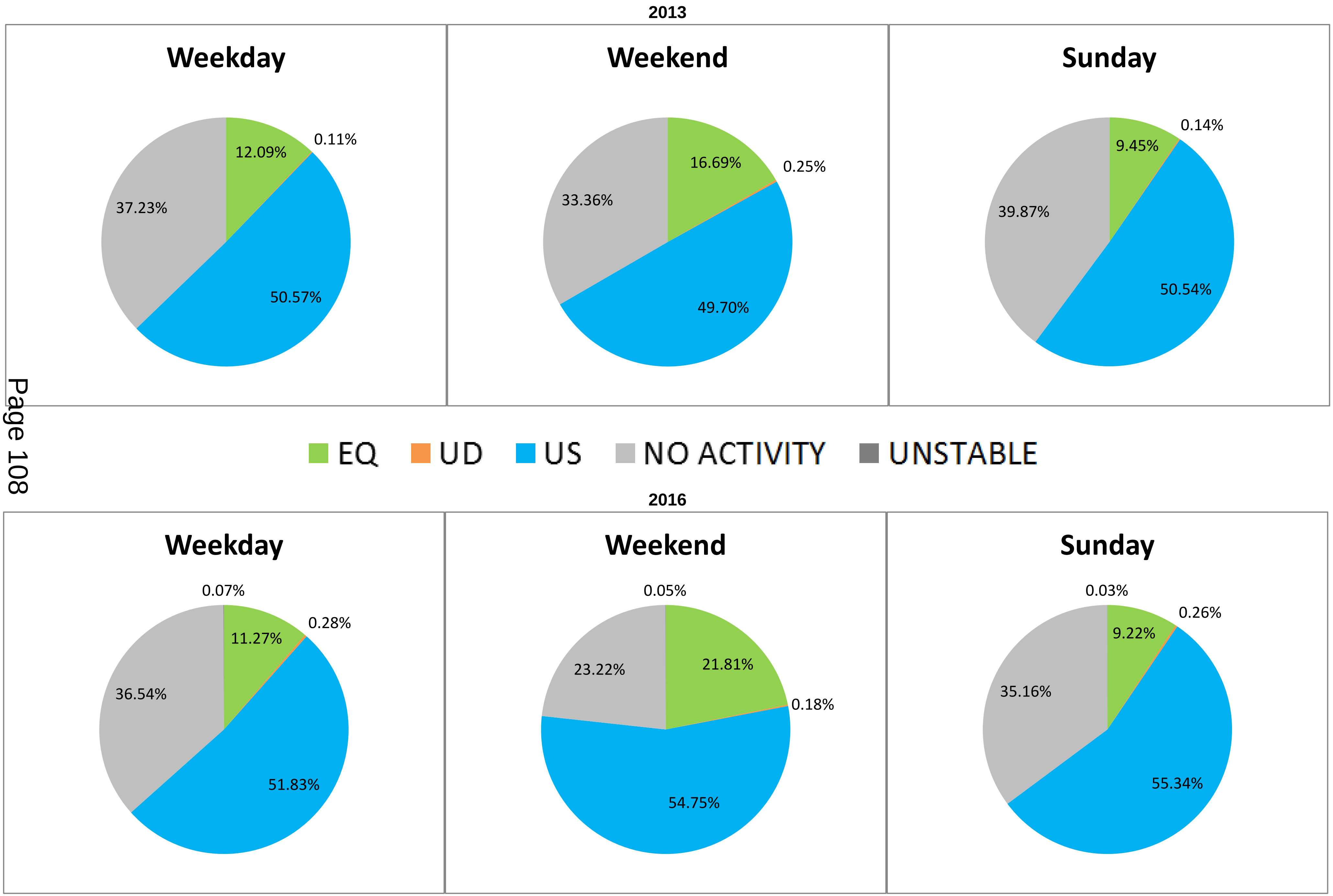
Wood Street / Westgate Street







Appendix C:
Comparison of Market Conditions 2013 and 2016


2013
Weekday
12.09%
0.11%
50.57%
37.23%
Weekend
16.69%
0.25%
49.70%
33.36%
Sunday
9.45%
0.14%
50.54%
39.87%
EQ
UD
US
NO ACTIVITY
UNSTABLE
2016
Weekday
0.07%
11.27%
0.28%
51.83%
36.54%
Weekend
0.05%
21.81%
0.18%
54.75%
23.22%
Sunday
0.03%
9.22%
0.26%
55.34%
35.16%

Cardiff Taxi Licensing Study 2016

Part 3: Operator and Stakeholder Attitude Survey

Cardiff Council

29 September 2016

Prepared by:	Katie Jackson	Checked by:	Stephen Hathaway...................................
Verified by	Ellena Caudwell..	Approved by:	John Webber...................................

Cardiff Taxi Licensing Study 201: Part 3: Operators and Stakeholders Attitude Survey

Rev No	Comments	Checked by	Approved by	Date
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Telephone: 029 2067 4600 Website: http://www.aecom.com

Job No 60484283 Reference M001.001 Date Created August 2016

Table of Contents

E Executive Summary

E. Executive Summary

E.1 Cardiff Council (CC) controls the issuing of taxi licences in Cardiff. Following a previous study in 2010 where there was no evidence of significant unmet demand, the Council imposed a moratorium on the issue of new taxi licences. This restriction was left in place following a further study in 2013.

E.2 Under DfT Taxi and Private Hire Vehicle Licensing Best Practice Guidance, a new study is required at a maximum interval of three years when a quantity restriction is in place. A new study is now due.

E.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.

E.4 The main objectives of the study are as follows:

- To identify the current level of demand for taxis within Cardiff;
- To assess whether the supply of taxis matches the demand;
- To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
- To identify areas of the service that could be improved.

E.5 In order to meet these objectives six different surveys have been undertaken. These surveys are described in three separate reports, with one overriding report summarising all the information and drawing the key conclusions and making recommendations. The four reports are listed below:

Report	**Surveys**
Cardiff Taxi Licensing Study 2016: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2016: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2016: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2016: Part 4: Summary Report	• Summary of the above surveys

E.6 This report is the Operator and Stakeholder Attitude Survey which analyses the online survey results from stakeholders and licensed vehicle operators within Cardiff. Information collected from the surveys have been analysed to help determine the current level of service and market conditions in Cardiff.

E.7 Sixteen stakeholders responded to the online survey, of which eleven had direct interaction with the licensed vehicle trade and therefore completed the survey. Given the sample size the views expressed may not be representative of all stakeholders in the taxi industry in Cardiff, but give an indication of views across a cross-section of taxi user groups. The stakeholders interviewed used a mixture of taxis and private hire vehicles (PHVs). There was a general feeling that there is an adequate supply of taxis in Cardiff, and the stakeholders generally felt there has been an increase in the number of taxis available compared to three years ago.

E.8 A total of three licensed vehicle operators were interviewed. One operator felt there were too many taxis in Cardiff and the other two felt there were an adequate number. All three firms felt there were not enough PHVs in Cardiff. One operator felt that there are an inadequate number of taxi ranks, and that the ranks in some locations are not large enough. All licensed vehicle operators agreed that standard and quality requirements were adequate, but two felt that enforcement of the requirements was not strict enough.

1 Introduction

1 Introduction

1.1 Background

1.1.1 Cardiff Council (CC) controls the issuing of taxi licences in Cardiff. Following a previous study in 2010 where there was no evidence of significant unmet demand, the Council imposed a moratorium on the issue of new taxi licences. This restriction was left in place following a further study in 2013.

1.1.2 Under Department for Transport (DfT) Taxi and Private Hire Vehicle Licensing Best Practice Guidance[1], a new study is required at a maximum interval of three years when a quantity restriction is in place. A new study is now due.

1.1.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.

1.1.4 The term 'Taxi' is commonly used to refer to both Hackney Carriages and Private Hire Vehicles (PHVs). However, for clarification, in this report the term 'Taxi' is used to refer to Hackney Carriages in line with the Law Commission report titled 'Taxi and Private Hire Services'[2]. Where the report includes analysis that refers to PHVs, this will be clearly stated.

1.2 Study Objectives

1.2.1 The main objectives of the study are as follows:

- To identify the current level of demand for taxis within Cardiff;
- To assess whether the supply of taxis matches the demand;
- To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
- To identify areas of the service that could be improved.

1.2.2 In order to meet these objectives six different surveys have been undertaken. These surveys are described in three separate reports, with one overriding report summarising all the information and drawing the key conclusions and making recommendations. The four reports are listed below:

Report	Surveys
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1.2.3 This report is the Operator and Stakeholder Attitude Survey which analyses the online survey results from stakeholders and licensed vehicle operators within Cardiff. Information collected from the surveys have been analysed to help determine the current level of service and market conditions in Cardiff.

1.3 Overview and methodological approach

1.3.1 In line with 2010 and 2013 iterations of this study, AECOM has attempted to contact both licensed vehicle operators and key stakeholders in the city, to take part in the survey. In order to make the survey accessible and more attractive to potential respondents it was decided that an online approach would be used for this iteration of the consultation.

[1] https://www.gov.uk/government/publications/taxi-and-private-hire-vehicle-licensing-best-practice-guidance
[2] https://www.gov.uk/government/publications/taxi-and-private-hire-services

1.3.2 For the stakeholder consultation the online questionnaire was emailed to 48 known contacts, 29 of whom were identified by Cardiff Council, with a further 19 identified by the lead Health and Safety Officer and Access Officer at the Council, Robert Gravelle, who was keen to for AECOM to extend the scope to include local groups that work with and represent the disabled/elderly. Another version of the questionnaire was made available to Mr Gravelle to allow him to forward on to other user groups who have expressed interest in participating. Overall this resulted in 16 responses to the stakeholder questionnaire being received.

1.3.3 Six Cardiff based Taxi/Private Hire Vehicle operators were invited to participate in the study, three of which completed the online survey.

1.4 Report Structure

1.4.1 Following this introduction, the report is structured as follows:

- Section 2 presents a summary of the findings from the stakeholder engagement
- Section 3 summarizes the responses from licensed vehicle operators

2 Stakeholder Response Findings

2 Stakeholder Response Findings

2.1 Questionnaire structure

2.1.1 The stakeholder questionnaire introduced the survey and included the definition of Taxi and Private Hire Vehicles (PHVs) to help respondents distinguish between the two, and so qualify their organisation's use or their own personal use of Taxis and PHVs. The definition used for Taxis was *'Black & white vehicle with white bonnet or all black London-style Taxis with 'Taxi' sign on roof. Can pick up on-street, from Taxi ranks and can also be hired out.'* The definition used for Private Hire Vehicles (PHVs) was *'Can only be used for private hires; are unable to pick up on-street and must be pre-booked.'*

2.1.2 At the outset the survey gathered information about the respondent and the nature of their interaction with the local Taxi and PHV industry, what type of licensed vehicles they/their organization used and how well they rate services and service provision.

2.2 Stakeholder profile

2.2.1 Of the 16 respondents who took part in the survey, five had no direct interaction with the taxi industry and were not able to continue the survey.

2.2.2 The remaining eleven respondents did have direct interaction with the taxi industry in Cardiff and as such were permitted to continue the survey on behalf of their organisation. Table 2.1 summarises the type of organisation the respondents represent while Table 2.2 outlines the nature of the interaction with the taxi industry these respondents said they have. Respondents were able to select more than one form of interaction, and as such the numbers total more than eleven.

Table 2.1 – Stakeholder profile by organisation type

Organisation type	Number
Charity	3
Student representative bodies	2
Local council	2
Visitor attractions	2
Hotelier	1
Transport operator	1
Total	**11**

Table 2.2 – Nature of interaction with industry – All respondents[3]

Nature of interaction	Number
I book vehicles for other people (i.e. colleagues or customers)	3
I use vehicles for business travel	5
I manage business contracts with Taxi and PHV operators	2
Enforcement	1
Other	5
Total	**16**

[3] Multiple responses allowed

2.2.3 Of these eleven not all respondents answered all questions, as such all results should be considered with a degree of caution, appropriate for a sample size of this kind.

2.2.4 Generally speaking the responding stakeholder organisations use a mix of taxis and PHVs, with a need to book both based on customer need and requirement.

'Need dependent. We have a contract which we use to move prearranged journeys, and also [pick] people up off the street for their return journey at times'

2.2.5 Six out of the eleven responding stakeholders felt that there is a difference between PHVs and taxis in Cardiff, with two respondents stating that taxis tend to be unclean and poorly maintained.

'Private hire vehicles are generally of a higher quality than hackney carriage vehicles - they tend to be cleaner.'

'Taxis are poorly maintained, serviced and at times very unclean.'

2.2.6 The two respondents who represent charities that cater for the disabled also stated that their members tend to prefer PHVs as they provide a better service that caters for the needs of disabled passengers.

'Private hire taxis tend to be more accessible and are the means that most disabled people look to book'

'The most common occurrence of access issues for guide dog owners is at taxi ranks where drivers refuse to take the dog or drive off without even engaging in conversation.'

2.2.7 Two respondents pointed to different standards of driver ability across operators rather than a specific difference in the quality of PHVs compared with taxis.

'Differing standards of maintenance and driver skill.'

'It is not private/ taxi, it is operator and individual. We need a consistent standard across operators and drivers.'

2.2.8 Respondents were asked to rate the quality of taxis and/or PHVs across various metrics according to which ones their organisation uses. Due to the low level of respondents the results in the table are indicative, but it can be inferred that there is little difference in perception of users of taxis and PHVs.

Table 2.3 – Rating for Taxis and PHVs on aspects of appearance and cleanliness

	Taxis			PHV		
Rating:	General appearance	External cleanliness	Internal cleanliness	General appearance	External cleanliness	Internal cleanliness
Very good	2	2	2	1	1	-
Good	1	2	2	3	3	4
Neither	1	-	-	-	-	-
Poor	-	-	-	-	-	-
Very poor	1	1	1	-	-	-
Total**	5	5	5	4	4	4

**** Caution – very low response base means that results are indicative only**

2.2.9 Again as shown in Tables 2.4 and 2.5 there is little difference in the ratings of taxis and PHVs in terms of various aspects of their customer service.

Table 2.4 – Rating for Taxis on aspects of customer service

Rating:	Taxis				
	Driving skills	Route knowledge within Cardiff	Route knowledge outside the Cardiff area	Customer service	Waiting time
Very good	3	3	2	2	3
Good	1	1		1	1
Neither	1	1	1	2	1
Poor	-	-	-	-	-
Very poor	-	-	-	1	1
Don't know	1	1	3	-	-
Total**	5	5	5	5	5

**** Caution – very low response base means that results are indicative only**

Table 2.5 – Rating for PHVs on aspects of customer service

Rating:	PHVs					
	Driving skills	Route knowledge within Cardiff	Route knowledge outside the Cardiff area	Customer service	Waiting time	Punctuality
Very good	1	-	-	-	1	1
Good	2	3	2	3	1	3
Neither	1	1	1	1	2	1
Poor	-	-	-	1	1	-
Very poor	-	-	-	-	-	-
Don't know	1	1	2	-	-	-
Total**	5	5	5	5	5	5

**** Caution – very low response base means that results are indicative only**

2.2.10 Three of the respondents told us that they book vehicles for disabled users on behalf of their organisations, and of these one cited difficulties when doing this. This respondent further stated that they tend to find it easier to book PHVs for disabled users after experiencing problems with reliability of taxis and specific problems where taxi drivers have refused to take passengers with assistance dogs.

2.2.11 There is no evidence based on the data that stakeholders perceive that using taxis in Cardiff is unsafe.

Table 2.5 – Rating for Taxis and PHVs on aspects of safety

Rating:	Waiting at Taxi ranks in Cardiff	Travelling by Taxi	Travelling by Private Hire Vehicle
Very safe	1	2	2
Fairly safe	3	3	4
Neither	2	2	1
Fairly unsafe	3	2	1
Very unsafe	-	-	-
I don't do this	2	2	3
Total**	11	11	11

**** Caution – very low response base means that results are indicative only**

2.2.12 Generally speaking stakeholders agree that fares and wait times for taxis in Cardiff are reasonable, however the data indicates that respondents feel that it is more challenging to predict how much fares will be for their journeys and that taxi ranks are not easy to find.

Table 2.6 – Rating for Taxis on aspects of price and supply

Rating:	Waiting times for Taxis in Cardiff are reasonable	There is an adequate supply of Taxis in Cardiff at all times	It is easy to predict how much a journey by Taxi in Cardiff will cost	Taxi ranks are well publicised / sign posted and are easy to find
Agree strongly	4	4	1	1
Agree slightly	3	2	2	3
Neither	-	1	2	-
Disagree slightly	2	-	2	3
Disagree strongly	-	2	2	3
Don't know	2	2	2	1
Total**	11	11	11	11

**** Caution – very low response base means that results are indicative only**

2.2.13 Generally speaking stakeholders agree that fares and wait times for PHVs in Cardiff are reasonable, however the data indicates that respondents feel that it is more challenging to predict how much fares will be for their journeys.

Table 2.7 – Rating for PHVs on aspects of price and supply

Rating:	Fares seem reasonable for the journey undertaken	Waiting times for PHVs in Cardiff are reasonable	There is an adequate supply of PHVs in Cardiff at all times	It is easy to predict how much a journey by PHV in Cardiff will cost	There are always PHVs available for my booking
Agree strongly	1	2	1	1	3
Agree slightly	6	3	5	3	3
Neither	2	1	1	1	2
Disagree slightly	-	2	1	1	1
Disagree strongly	-	-	1	2	-
Don't know	2	3	2	3	2
Total**	11	11	11	11	11

**** Caution – very low response base means that results are indicative only**

2.2.14 Respondents were also asked about their perception of the availability of taxis and PHVs in the last three years. Generally speaking more respondents felt that there has been an increase in taxi availability in the city in the last three years, with seven believing it has increased, and two respondents stating it has decreased. Four respondents agreed that there has been an increase in PHVs in Cardiff in the last three years, while a further four stated there has been no change. No respondents indicated they perceived the number of PHVs had decreased.

2.2.15 Further comments related to accessibility of services both from student representatives, who report they are unable to obtain taxis to complete short journeys or are forced to pay upfront for journeys, and the disabled and guide /dog owners being refused passage. Those representing disabled groups felt that local councils were failing in their obligation to ensure that those with protected characteristics are not subject to discrimination.

'We have a big problem with taxis refusing short journeys for students…This is a safety concern for our students.'

'Guide dog owners continue to be refused service by taxis all over Wales including Cardiff'

2.2.16 Other comments pointed to improved driver training as a way to improve service;

'There may be a need for enhanced driver training on dealing with the public and providing a high quality service'

'Why is it not mandatory for all Cardiff based taxi drivers to have disability equality awareness training delivered by disabled people and their representative organizations?'

2.2.17 And again poor quality vehicles were cited as a problem in a minority of cases

'However, there have been some occasions that I have used a taxi where the vehicle appeared to be older and/or worn and of low quality'

'There is nothing worse than getting in to a taxi that smells of cigarettes, i.e. the driver has had a smoke in it whilst off duty, or even worse, where they seats look greasy and the car smells.'

3 Operator Response Findings

3 Operator Response Findings

3.1 Questionnaire Structure

3.1.1 AECOM worked with Cardiff Council to identify email contacts for six licensed vehicle operators, to ensure that we were able to gain access to a representative of sufficient seniority within the business to be able offer an organizational response to the questionnaire.

3.1.2 The questionnaire covered the respondent's role within their organisation, the type(s) of vehicle operated (taxi and PHV – as defined in the stakeholder survey), the number of vehicles operated by type and the number of drivers. It also covered changes in the market, service provision and attitude and sentiment towards taxi/PHV operation in Cardiff. The questionnaire also covered the operator's commitment to making their fleet wheelchair accessible and low emission and gathered views on industry regulation.

3.1.3 The findings comprising this section of the report represent the view of the three respondents within the industry and as such may not constitute a full reflection of the views of the wider taxi industry in Cardiff.

3.2 Operator Findings

3.2.1 Two of three firms interviewed include PHVs and taxis in their fleet of vehicles, while one firm's fleet just comprises PHVs. The largest taxi firm interviewed has 120 taxis and 580 PHVs which are operated by 700 drivers. The smallest firm operates just three taxis and nine PHVs with 28 drivers employed.

3.2.2 Firms reported few changes in vehicle and driver composition over the last three years; one company had increased the number of PHVs, but there were no changes in the number of taxis operated by the companies interviewed. Two of the companies have taken on additional drivers in the last three years.

3.2.3 The operators were asked how they would rate the market conditions for their business compared with 12 months ago; two of the three firms felt that there has been no change, while one felt that things had improved for them in the last year. Two firms reported increase in customer patronage, while one felt that things had remained quite stable. Two of the firms interviewed stated that they find it fairly or very difficult to recruit new drivers, however the largest operator interviewed stated that they find it fairly easy to recruit.

3.2.4 In order to assess each operator's feelings about the supply of taxis in Cardiff, they were asked whether they felt there are '*not enough taxis in Cardiff*', '*just the right amount'* or '*too many taxis in Cardiff'.* The response cannot be conclusive given the sample size, but two of the three firms said there is the right number of taxis in Cardiff and one said that there are too many. All three firms agreed, however, that there are not enough PHVs in Cardiff.

3.2.5 The operators were then asked what the breakdown of their custom is across pick-ups from various locations/by various methods. As shown in Table 3.1 the bulk of custom comes through telephone bookings. While the proportion of bookings made through apps and online methods vary from operator to operator.

Table 3.1- Customer type by operator interviewed

Customer type	Operator 1	Operator 2	Operator 3
Pick-ups hailed at designated ranks	Unknown	0	0
Work gained through contracts	10%	15%	9.7%
Booked by telephone (exclusive of contract work)	65%	70%	90%
Booked through an app (exclusive of contract work)	20%	10%	0%
Booked online/via email (exclusive of contract work)	5%	5%	0.3%

3.2.6 Operators were then asked to what extent they agreed or disagreed with the following statements covering aspects of taxi operation in Cardiff:

- *There are an adequate number of taxi ranks in Cardiff city centre*
- *There are an adequate number of taxi ranks in wider Cardiff*
- *The taxi ranks in Cardiff are suitable locations*
- *The taxi ranks in Cardiff are an adequate size*
- *The hours of operation are suitable*

3.2.7 One firm agreed with all of the statements, and one offered a neutral opinion. One operator disagreed with all aspects related to the adequacy of the number of taxi ranks and their location in Cardiff and the surrounding area, stating that additional ranks are needed in Cardiff City Centre and in the Cardiff Bay areas. The operator was then asked where in particular the ranks should be relocated, or where there are particularly problematic ranks:

> *'Planning need to look into this deeply, they seem to be parked on double yellow lines as not enough space on ranks, maybe longer feeder ranks should be considered… look at all ranks over the weekend [and] it will become apparent that there is a shortage of space'*

3.2.8 Operators were then asked if they had any further comments on taxi ranks in Cardiff. One respondent shared their views on supply and regulation:

> *'There is no requirement for additional taxis in Cardiff. When there is a major event on there are of course going to be issues in securing a taxi off a rank at all other times the trade has the correct number of hackneys the issue is when some of these hackney's cherry pick their jobs and do not abide by the legislation.'*

3.2.9 The three responding organisations were then asked about the accessibility of their vehicle fleet .The two firms that operate taxis were asked what proportion of their taxis are wheelchair accessible, and one firm indicated that all of their fleet are while the other said that less than 25% of their fleet of taxis are wheelchair accessible. Both firms that operate taxis stated that they plan to increase the number of wheelchair accessible vehicles in their fleet. In terms of PHVs all firms said that less than 25% of their fleet consist of wheelchair accessible vehicles, and all three have no plans to increase this proportion.

3.2.10 Operators were then asked what proportion of their taxis and/or PHVs are Low Emission Vehicles (LEVs) and across all types operators stated that less than 25% of vehicles are LEVs. The two firms that operate taxis and PHVs stated that they plan to increase their number of LEVs of both types.

3.2.11 The questionnaire also covered regulation and all operators were asked to what extent they agreed or disagreed with the statement '*the current requirements on vehicle standards and quality are sufficiently strict'* and all firms agreed that the requirements are about right.

3.2.12 Operators were then asked whether they agreed or disagreed with the following '*The current enforcement on vehicle standards and quality is sufficiently strict*'. One firm again agreed that this is about right, while two firms interviewed felt that the current enforcement is not strict enough. In terms of changes operators would like to see in relation to any aspect of vehicle standard and quality requirements, one operator would like to see checks carried on a more regular basis and another would like to see more consistency across operator by type, particularly in reference to Uber.

> *'Yes for all out of town hackneys now working in Cardiff for Uber to abide by the same rules and standards at the very least. Also for extensions past 10 years to be reviewed on quality of vehicle only. '*

3.2.13 The same operator went on to say that they feel that the taxi trade is not being regulated to an adequate level:

> *'The Council should encourage the private hire industry growth which is highly regulated by the company owners and discourage the growth of the hackney taxi trade as these drivers work independently and their rules and legislation are not enforced anywhere near the level it should be'*

4 Summary

4 Summary

4.1 Summary

Stakeholders

4.1.1 A total of sixteen stakeholders responded to the online survey, eleven of which had direct interaction with the licensed vehicle trade and therefore were able to complete the questionnaire. The respondents were from a mixture of organisations, including charities, student bodies, local council, transport operator and visitor attractions and hotels.

4.1.2 Respondents used a mixture of taxis and PHVs according to need, and approximately half felt there was a noticeable difference between taxis and PHVs in regards to vehicle standards.

4.1.3 There was no indication from the responses that taxi availability had decreased, with the majority indicating they felt availability had increased in the last three years. There was, however, some concern expressed regarding refusal of passage due to short journeys or taking guide dogs.

4.1.4 There was little difference in the results for taxis and PHVs when rated on customer service, appearance and cleanliness and safety, with overall results positive. Waiting times for vehicles were considered reasonable by most respondents, although predictability of fares was considered challenging by approximately half of respondents for both taxis and PHVs.

4.1.5 Taxi rank locations were considered not easy to find by the majority of respondents.

Operators

4.1.6 A total of three licensed vehicle operators responded to the online survey. The findings from this section represent the view of a few individuals and therefore may not be a true reflection of the wider industry in Cardiff.

4.1.7 Two of the operators who responded used a mixture of taxis and PHVs, with the third operating just PHVs.

4.1.8 One taxi operator said all their vehicles are wheelchair accessible, whilst the other stated less than one quarter is wheelchair accessible. All three PHV operators stated that less than one quarter of their fleet are wheelchair accessible, and all operators stated less than one quarter of their fleet are Low Emissions Vehicles.

4.1.9 In regards to availability, two operators felt there are the right number of taxis in Cardiff, whereas one firm stated there are too many. All firms felt there are not enough PHVs in Cardiff. When asked about market conditions for their business in the last 12 months, two of the three operators said they noticed no difference, whereas one felt things had improved.

4.1.10 The majority of custom for all three operators was pre-booked on the phone, with bookings from contract work and apps varying from operator to operator.

4.1.11 When asked about taxi ranks, there was a range of responses in regards to number, size and location of ranks. One operator stated there should be additional ranks in the city centre and the Cardiff Bay areas, and consideration given to extending ranks where they are currently too small.

4.1.12 All firms felt the requirements on vehicle standards and quality are sufficient, although two of the three firms felt the enforcement of these standards is not strict enough, with one comment highlighting the need for the same rules and standards for all taxis to be enforced.

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AECOM

Cardiff Taxi Licensing Study 2016

Part 2: Driver and Proprietor Attitude Survey

Cardiff Council

29 September 2016

Prepared by: Jacob Hughes...................................... Checked by: Ellena Caudwell...................................

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Cardiff Taxi Licensing Study 2016: Part 2: Driver and Proprietor Attitude Survey

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E Executive Summary

Executive Summary

E.1 Cardiff Council (CC) controls the issuing of taxi licences in Cardiff. Following a previous study in 2010 where there was no evidence of significant unmet demand, the Council imposed a moratorium on the number of taxi licences available. This restriction was left in place following a study in 2013.

E.2 Under DfT Taxi and Private Hire Vehicle Licensing Best Practice Guidance, a new study is required at a maximum interval of three years when a cap is in place. A new study is now due.

E.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.

E.4 The main objectives of the study are as follows:

- To identify the current level of demand for taxis within Cardiff;
- To assess whether the supply of taxis matches the demand;
- To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
- To identify areas of the service that could be improved.

E.5 In order to meet these objectives six different surveys have been undertaken. These surveys are described in three separate reports, with one overriding report summarising all the information and drawing the key conclusions and making recommendations. The four reports are listed below:

Report	**Surveys**
Cardiff Taxi Licensing Study 2016: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2016: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2016: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2016: Part 4: Summary Report	• Summary of the above surveys

E.6 This report is the Driver and Proprietor Attitude Survey which analyses two of the six surveys which have taken place; driver questionnaires and proprietor questionnaires. The data collected from these surveys has been analysed to determine views on the current level of service and market conditions in Cardiff. The key findings are given below:

E.7 The driver questionnaire analysis indicates that private hire drivers work longer hours than taxi drivers, whilst the night time economy is largely worked by taxi drivers. The average number of hours worked by taxi drivers in a typical week has dropped slightly since the 2013 study.

E.8 The majority of drivers who responded own their vehicle, and the majority of proprietors who responded to the survey drive their vehicle. Therefore there may be an overlap of respondents leading to duplicated viewpoints.

E.9 Average wait times between fares are usually over 15 minutes for every day type, with the shortest wait time on a weekend night time. Comments and other question responses indicate many drivers and proprietors feel there are too many drivers and private hire vehicles currently in Cardiff, and the majority feel the cap on taxis should be kept at its current level rather than removed or increased.

E.10 Many drivers and proprietors feel there are not enough taxi ranks in Cardiff, or that the existing ranks are not large enough.

E.11 Suggested improvements include tougher or more frequent enforcement on vehicles and drivers and improved requirements to become a driver.

1 Introduction

1 Introduction

1.1 Background

1.1.1 Cardiff Council (CC) controls the issuing of taxi licences in Cardiff. Following a previous study in 2010 where there was no evidence of significant unmet demand, the Council imposed a moratorium on the number of taxi licences available. This restriction was left in place following a study in 2013.

1.1.2 Under Department for Transport (DfT) Taxi and Private Hire Vehicle Licensing Best Practice Guidance[1], a new study is required at a maximum interval of three years when a cap is in place. A new study is now due.

1.1.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.

1.1.4 The term 'Taxi' is commonly used to refer to both Hackney Carriages and Private Hire Vehicles (PHVs). However, for clarification, in this report the term 'Taxi' is used to refer to Hackney Carriages in line with the Law Commission report titled 'Taxi and Private Hire Services'[2]. Where the report includes analysis that refers to PHVs, this will be clearly stated.

1.2 Study Objectives

1.2.1 The main objectives of the study are as follows:

- To identify the current level of demand for taxis within Cardiff;
- To assess whether the supply of taxis matches the demand;
- To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
- To identify areas of the service that could be improved.

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[1] https://www.gov.uk/government/publications/taxi-and-private-hire-vehicle-licensing-best-practice-guidance
[2] https://www.gov.uk/government/publications/taxi-and-private-hire-services

1.3 Report Structure

1.3.1 Following this introduction, the report is structured as follows:

- Section 2 sets out the study methodology of the study, providing details of the surveys and consultations undertaken.
- Section 3 summarises the key results from the vehicle and business sections of the driver survey.
- Section 4 summarises the key results from the vehicle section of the proprietor survey.
- Section 5 outlines the results of the views and improvements section of both surveys.
- Section 6 provides the summary and conclusions of this report.

2 Methodology

2 Methodology

2.1 Overview

2.1.1 This study was carried out by means of a postal questionnaire during June and July 2016. The survey was sent out to all licensed drivers and proprietors registered by Cardiff Council. Copies of the questionnaires can be found in **Appendix A** and **Appendix B** respectively. Recipients were also sent a covering letter explaining the purpose of the study. The questionnaires and covering letters were prepared by AECOM, and distributed by Cardiff Council to ensure compliance with the Data Protection Act. All questionnaires received were treated as confidential and have no means of identifying the respondent.

2.1.2 It should be noted that a number of proprietors are also drivers, so some individuals will have received both questionnaires and therefore their views may be represented twice.

2.2 Driver Survey

2.2.1 Questionnaires were sent to all registered drivers, providing a potential sample base of 2130 drivers. In total, 189 surveys were returned within the deadline, of which 12 were spoiled and three were removed due to their answers not being applicable[3]. This gives a total of 186 responses, which equates to a response rate of 8.2%. It should be noted that due to the small sample size the results are indicative rather than definitive of the whole population throughout this report.

2.2.2 Drivers in Cardiff are issued with a dual badge which enables them to drive either Taxis or Private Hire Vehicles. The survey was sent to all drivers, and the results have been reported according to which vehicle type they said they drove to show the difference of opinion between different types of driver. A small number of respondents indicated they were both taxi and private hire vehicle drivers; their responses have been combined with the responses of taxi drivers in this report. Table 2.1 shows the total responses from the three different types of trade identified.

Table 2.1 – Breakdown of survey respondents by trade type

	Frequency	Percentage
Taxi	63	36.2%
Private Hire Vehicle	106	60.9%
Both	5	2.9%
Total	**174**	**100.0%**

2.2.3 The number of taxi drivers who responded to the survey in 2016 (68) is lower than in the previous two surveys, with 100 taxi drivers responding in 2010 and 94 responding in 2013. Consequently, the majority responses received in 2016 comes from PHV drivers (61%).

2.2.4 In the following tables and figures the totals do not always add up to the same amount. This is due to one of three reasons:

- not all respondents were required to answer all the questions;
- some respondents failed to answer some questions that were asked; and
- some questions allowed multiple responses.

2.2.5 It should be noted that where there are percentages these may not total 100% due to rounding.

[3] Two surveys were left blank and the other survey was left incomplete after a comment on mentioning that they drove a school minibus not a licensed vehicle.

2.3 Proprietor Survey

2.3.1 In addition to the driver questionnaire, a modified questionnaire was sent out to all taxi and PHV proprietors. The first sections of this second questionnaire were altered to gather information specific to proprietors, with the last two sections identical to the driver questionnaire.

2.3.2 Of a total of 1363 registered proprietors, a total of 163 surveys were returned by the deadline, giving a response rate of 12.0%. No surveys were spoiled or removed. The breakdown of vehicle types owned by each proprietor is given in Table 2.2.

Table 2.2 – Breakdown of proprietor respondents by vehicle type

	Frequency	Percentage
Taxi	63	38.7%
Private Hire Vehicle	85	52.1%
Both	8	4.9%
No Answer	7	4.3%
Total	**163**	**100.0%**

3 Driver Survey

3 Driver Survey

3.1 Introduction

3.1.1 This section of the report summarises the results of the taxi and PHV driver survey. The structure of the section follows the driver questionnaire, with sections as follows:

3.2 About You
3.3 About Your Vehicle
3.4 About Your Business

3.1.2 The questionnaire was followed by a section on general views of the trade and comments and improvements. This information is analysed in Section 5 of this report.

3.2 About You

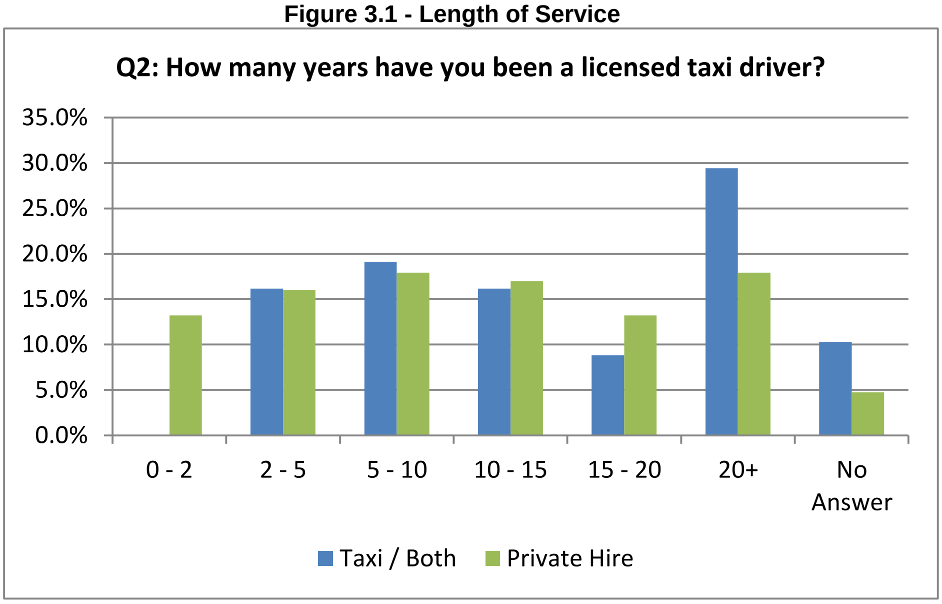
3.2.1 Table 3.1 shows the respondents by type and gender. This shows the trade is dominantly a male workplace.

Table 3.1 – Gender of Respondents

	Taxi/Both	Private Hire Vehicle
Male	99%	100%
Female	1%	0%
No Answer	0%	0%
Total	**100%**	**100%**

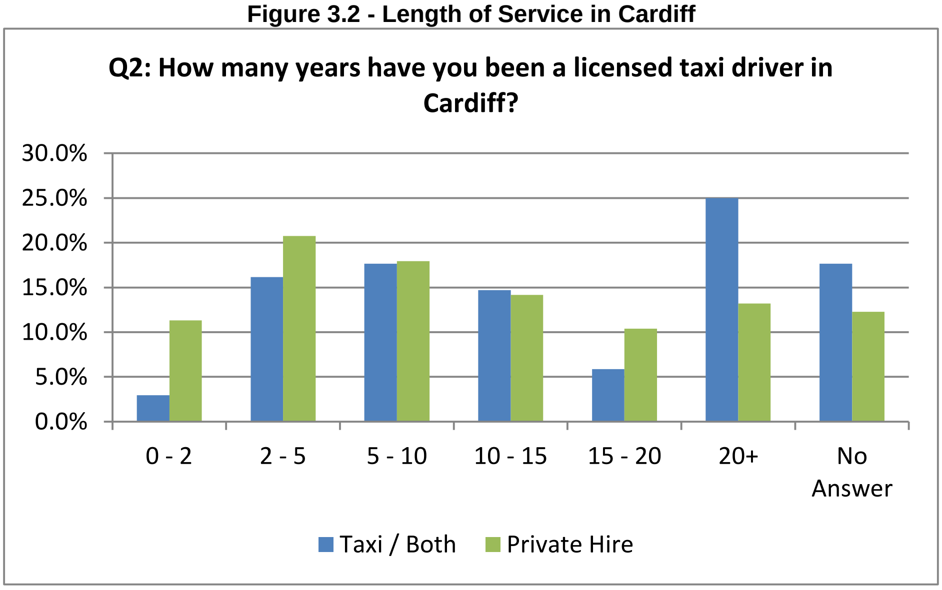
3.2.2 Respondents were asked how long they had worked as a licensed vehicle driver. Figure 3.1 below shows the breakdown of responses by the length of service. The length is similar for taxi and private hire. No respondents had held a taxi license or both for less than two years. This sample suggests that there is a fairly even split of private hire vehicle drivers who have held their license for less than 2 years all the way through to 20 or more years of service. No taxi drivers reported having a licence for less than 2 years and over a quarter have been working for 20 or more years.

Figure 3.1 - Length of Service



3.2.3 Respondents were also asked to indicate how many years they had been working as a licensed driver in Cardiff. The responses are summarised below in Figure 3.2. The length of service is generally lower than in Figure 3.1, indicating a number of drivers have moved to Cardiff during their time working as a driver.

Figure 3.2 - Length of Service in Cardiff



3.2.4 Table 3.2 shows the formal qualifications of the driver. The results indicate that many drivers have a qualification of some sort, with roughly three quarters having Disability Awareness Training. The proportion of drivers reporting that they held either BTEC Level 2 or NVQ Level 2 qualifications is higher than in 2013 for both taxis and private hire vehicles. Around 1 in 6 taxi drivers and 1 in 10 private hire drivers did not respond to the question.

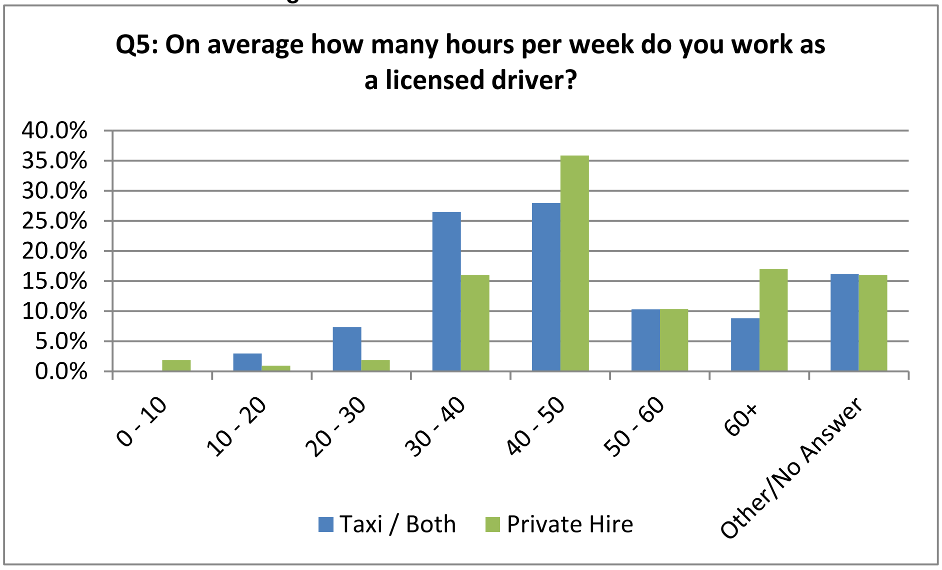
Table 3.2 – Driver Qualifications

	Taxi	PHV
BTEC Level 2	38%	62%
NVQ Level 2	16%	20%
Disability Awareness Training	76%	72%
Other	16%	11%
No Answer	15%	9%

3.2.5 Drivers were asked to give an average number of hours worked per week as a licensed vehicle driver. The results are shown in Figure 3.3 below. They show the majority of drivers work over 30 hours a week, with 47% of taxi drivers and 63% of private hire vehicle drivers working in excess of 40 hours per week. These figures are comparable with those recorded in the 2013 study.

3.2.6 According to the questionnaire results, the average number of hours worked in a week for a taxi driver is 39.6 hours, whereas private hire drivers work an average of 44.5 hours per week. Both figures are lower than were recorded in the 2013 study.

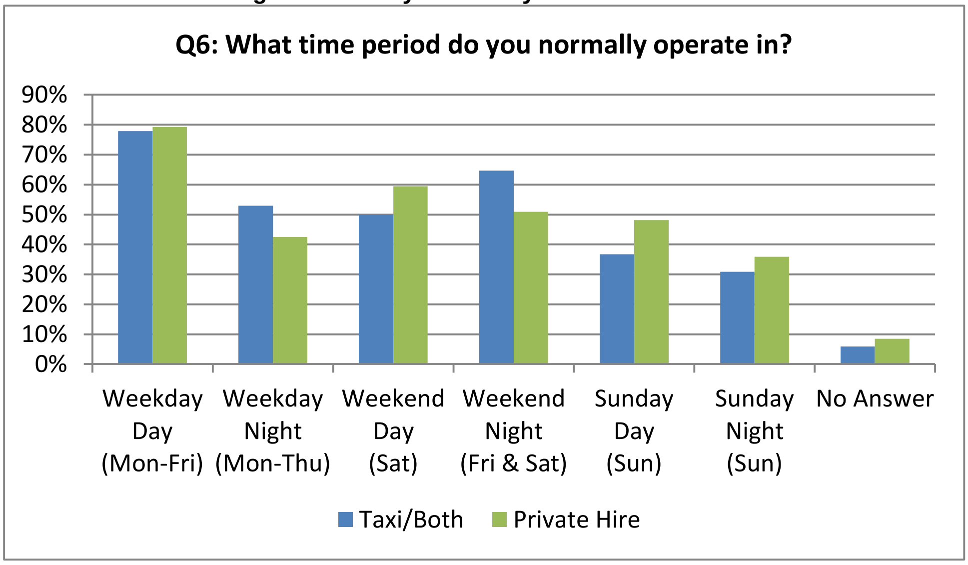
Figure 3.3 – Hours worked in a week



3.2.7 Respondents were asked which days they usually worked, with set time periods defined. Daytime was considered to be between 07:00 and 19:00, and night time between 19:00 and 07:00. The results are displayed in Figure 3.4. They show many taxi drivers work on weekday daytimes and weekend night times, which is consistent the taxi supply in the taxi rank results. Around half operate during weekday night time and weekend daytime periods, and Sunday coverage is around 30-40% throughout the day. Private hire drivers appear to work in the daytime more than night time across all day types, with weekend night time the most worked of all the night time periods,

3.2.8 Comparing the two types of drivers, private hire generally operate more in the daytime, and taxi drivers operate more in the night time.

Figure 3.4 – Days normally worked in a week

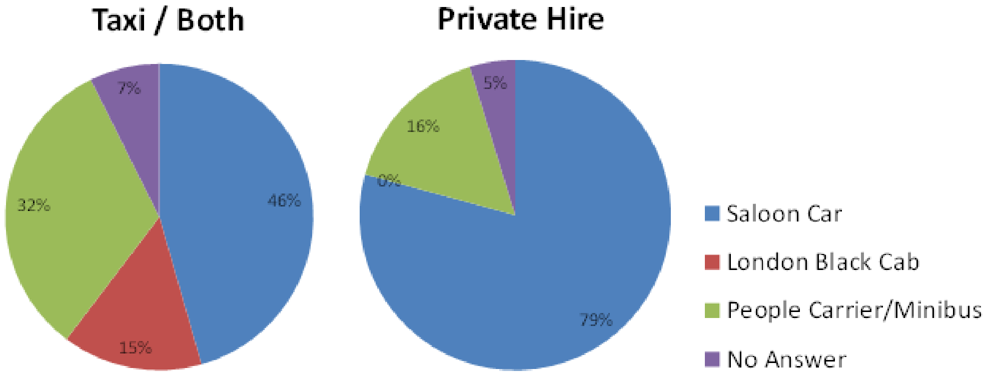


3.3 About Your Vehicle

3.3.1 Drivers were asked to indicate what type of vehicle they used. The results are shown in Figure 3.5. The results show just under a half of taxis are saloon style vehicles, with the next highest proportion people carriers or minibuses and London black cab the least used at just under 15% of respondents. The mix of vehicles is broadly comparable with the 2013 study.

3.3.2 Saloon cars can best describe the majority of private hire vehicles which account for 80% of vehicles, with 16% using people carriers or minibuses. The survey suggests that there are no private hire vehicles which resemble London black cabs. Again, the mix of vehicles is broadly comparable with the 2013 study, although there appears to have been a small increase in the proportion of people carriers/minibuses.

Figure 3.5 – Vehicle type



3.3.3 Drivers were asked whether their vehicle was wheelchair accessible. The results are in Table 3.3. The results show that around half of taxi drivers drive vehicles that are wheelchair accessible, which is similar to the proportion recorded in the 2013 study (56%). The majority of private hire vehicles are not wheelchair accessible and this is reflected in the survey response, with just 4% of private hire vehicle drivers reporting that they drive a wheelchair accessible vehicle.

Table 3.3 – Wheelchair accessibility

	Taxi	PHV
Wheelchair Accessible	54%	4%
Not Wheelchair Accessible	44%	93%
No Answer	1%	3%
Total	**100%**	**100%**

3.3.4 Drivers were also asked to indicate whether their vehicle is low emissions, with the results are in Table 3.4. Just over half of both taxi and private hire vehicle drivers indicated that they drove low emission vehicles. These figures are slightly lower than the results from the 2013 study.

Table 3.4 – Low emissions vehicles

	Taxi	PHV
Low Emissions	51%	55%
Not Low Emissions	41%	39%
No Answer	7%	7%
Total	**100%**	**100%**

3.3.5 Drivers were then asked about ownership of their vehicle, and whether they shared it with other drivers. The majority of drivers indicated that they also own their vehicle. A greater proportion of both taxi and PHV drivers indicated that they own their vehicle than in the 2013 study.

Table 3.5 – Vehicle Ownership

	Taxi	PHV
Own	74%	82%
Rent	26%	16%
No Answer	0%	2%
Total	**100%**	**100%**

3.3.6 When asked about sharing their vehicle, the majority said they did not, with only 4% of both taxi and private hire vehicle drivers indicating that they shared their vehicle with other drivers. Of those that did share, all drivers reported that they shared their vehicle with one other driver.

3.3.7 Respondents were asked whether they rent a radio for their vehicle. Table 3.6 shows that almost 9 out of 10 private hire vehicle drivers do rent a radio compared with around 1 in 5 taxi drivers. These figures are lower than recorded in the 2013 study, particularly amongst taxi drivers.

Table 3.6 – Rent a radio

	Taxi	PHV
Rent Radio	22%	88%
Don't rent radio	78%	12%
No Answer	0%	0%
Total	**100%**	**100%**

3.4 About Your Business

3.4.1 Taxi drivers were asked to indicate whether they took private bookings in addition to their usual line of work. One in five respondent said they did take private booking, a decrease from the 2013 study (33%), and two thirds indicated they did not. 12% of respondents did not answer this question.

3.4.2 The taxi drivers were asked which three ranks they most frequently visited, however some drivers gave fewer and some more than three answers, which were included. Table 3.7 show the answers given, grouped by popularity. Central Station, which was the most popular rank of the drivers who responded in 2013, is now the joint 4th most popular rank with 10% of respondents. This is understandable as the rank in Central Square has closed. St Marys Street and Greyfriars Road or the Hilton Hotel are now the first and second most frequented ranks; they were ranked as second and third in the previous survey. Park Place also receives a high percentage of response (13%) suggesting they visit this rank frequently.

Table 3.7 – Frequently visited ranks

	Frequency	Percentage
St Marys Street	32	22%
Greyfriars Road/Hilton Hotel	20	14%
Park Place	19	13%
Central Station	14	10%
Churchill Way	14	10%
Mill Lane	13	9%
Heath Hospital	8	6%
Cardiff Bay / Atlantic Wharf	6	4%
Canton	4	3%
Other (City Centre)	4	3%
All/Any Ranks	1	1%
No Answer	9	6%
Total	**144**	**212%**

3.4.3 All drivers were asked to indicate how long they have to wait on average between fares. This was broken down into the same day type categories as in Figure 3.4. The results in Table 3.8 show the results in percentages related to the total number of respondents for each licensing type. Where there have been no answers entered for a time period the row percentage totals do not add up to 100.

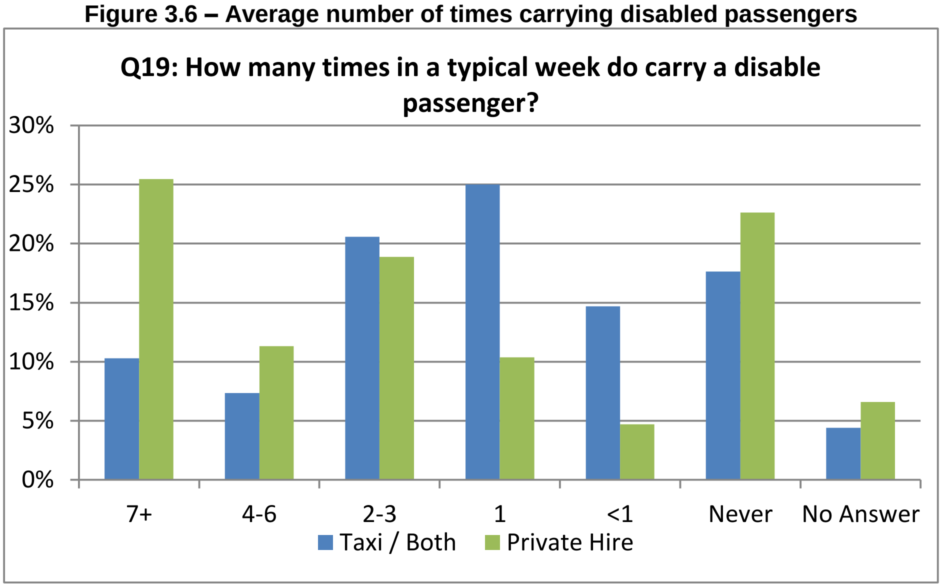
3.4.4 The results give a similar picture for taxis and private hire vehicles, with the majority of drivers waiting for over 15 minutes for every day type, with the exception of the slight majority of PHV drivers who wait between 10-15 minutes on weekend nights. Overall, private hire drivers gave a higher percentage of wait times below 15 minutes than taxi drivers, suggesting there is a lower average wait time for private hire vehicles. Taxi drivers indicated they have their lowest wait time on weekend night time, with 25% of respondents saying they wait less than 15 minutes.

Table 3.8 – Average wait time between fares

	Taxi				
	<5 mins	5-10 mins	10-15 mins	>15 mins	**Total**
Weekday Daytime	0%	0%	6%	72%	78%
Weekday Night time	0%	1%	4%	47%	53%
Weekend Daytime	0%	1%	6%	43%	50%
Weekend Night time	0%	6%	19%	40%	65%
Sunday Daytime	0%	0%	6%	31%	37%
Sunday Night time	0%	0%	0%	31%	31%
	Private Hire Vehicle				
	<5 mins	5-10 mins	10-15 mins	>15 mins	**Total**
Weekday Daytime	2%	3%	14%	60%	79%
Weekday Night time	0%	8%	6%	29%	42%
Weekend Daytime	2%	4%	19%	35%	59%
Weekend Night time	4%	14%	17%	16%	51%
Sunday Daytime	1%	4%	7%	37%	48%
Sunday Night time	0%	4%	2%	30%	36%

3.4.5 The questionnaire asked drivers about how often they carried disabled passengers in a typical week. The results are shown in Figure 3.3. The level of private hire drivers carrying disabled passengers is high, despite the apparent lack of wheelchair accessible vehicles.

Figure 3.6 – Average number of times carrying disabled passengers



3.4.6 The last question asked in this section was about whether the driver had been a victim of attack from a passenger in the last 12 months. The results in Table 3.9 show a difference between taxi and private hire drivers with 65% of private hire drivers not having been attacked, compared to 34% of taxi drivers not attacked. Over a half of taxi drivers have been verbally attacked in the last 12 months, and over 1 in 10 has been physically attacked.

3.4.7 Between study periods, those surveyed have generally suggested a decrease in the number of attacks on taxi drivers. A comparison between 2013 and 2016 surveys, show a decrease in the number of taxi drivers who were attacked in any form and there has been a reduction in the percentage of private hire drivers who have been verbally attacked. The percentage of physical attacks on private hire vehicle drivers has increased by 5% between 2013 and 2016.

Table 3.9 – Victim of attack in the last 12 months

	Taxi	PHV
Physically Attacked	13%	8%
Verbally Attacked	51%	25%
Not Attacked	34%	65%
No Answer	1%	2%
Total	**100%**	**100%**

4 Proprietor Survey

4 Proprietor Survey

4.1 Introduction

4.1.1 In addition to the driver questionnaire, a modified version was sent out to all proprietors. This section of the report summarises this second questionnaire, which can be found in Appendix B.

4.2 About You

4.2.1 Information about the gender of proprietors was gathered, with the results indicating that all of the respondents are male.

Table 4.1 – Gender of Proprietors

	Percentage
Male	100%
Female	0%
Prefer not to say	0%
Total	**100%**

4.3 About Your Vehicle(s)

4.3.1 Proprietors were asked how many vehicles they owned, and how many of these were either taxis or private hire vehicles. Two responses had figures which did not match the numbers given in the next question, and so these responses have been included in the ‘No Answer’ category.

4.3.2 Results are shown in Table 4.2. The majority of respondents own one vehicle, 6% between 2 and 5 vehicles, and only 2 respondents have more than 5 vehicles.

Table 4.2 – Number of vehicles owned

	Frequency	Percentage
1	141	87%
2-5	9	6%
6-10	1	1%
11+	1	1%
No Answer	11	7%
Total Number	**163**	**100%**

4.3.3 Table 4.3 shows the results broken down by vehicle type. Just over half of the respondents own just private hire vehicles (52%) with 39% owning just taxis. 6% of respondents own both vehicle types, and 4% didn’t answer the question.

Table 4.3 – Number of vehicles owned by type

	Taxi	PHV
1	61	91
2-5	8	1
6-10	1	1
11+	0	0
Total Number	**70**	**93**

4.3.4 Proprietors were asked whether their vehicles were saloon cars, London black cabs or minibus/people carriers. Most proprietors owned saloon car style vehicles, with 115 owning at least some of this type. A further 32 people owned minibus/people carriers and only 11 people owned London black cabs.

4.3.5 The next questions were about how many wheelchair accessible and low emissions vehicles the proprietor owned, and the answers were given as a percentage. These have been grouped to summarise the results.

4.3.6 Over half of the respondents did not own any wheelchair accessible vehicles. A further 20% only owned wheelchair accessible vehicles, and the remaining 4% owned some. 19% of respondents did not answer this question.

4.3.7 Just under one third of proprietors owned low emissions vehicles only, where the same percentage owned none. Approximately 33% of respondents did not answer this question, and the remaining 3% had a mixture of low emissions vehicles and not.

Table 4.4 – Wheelchair accessible and low emissions vehicles

	Wheelchair Accessible	Low Emissions
None	56%	32%
Some	4%	3%
All	20%	32%
No Answer	20%	33%
Total	**100%**	**100%**

4.3.8 Proprietors were asked whether they drive or rent out their vehicles. The results in Table 4.5 show the majority of respondents drive their vehicles, with 4% both driving and renting out and another 4% renting their vehicles only.. This indicates the majority of respondents received the driver questionnaire also, which involved overlapping questions.

Table 4.5 – Drive or rent vehicles

	Frequency	Percentage
Drive	137	84%
Rent	7	4%
Both	7	4%
No Answer	12	7%
Total	**163**	**100%**

4.3.9 Those who rent out their vehicles were asked to state how many people they rent it to. The results are in Table 4.6 below. The sample is small, but the majority of proprietors rent their vehicles out to fewer than five drivers, whilst 1 proprietor rents them out to over ten drivers.

Table 4.6 – Number of drivers using each vehicle

	Frequency	Percentage
1-2	4	29%
3-5	2	14%
6-10	1	7%
11+	1	7%
No Answer	6	43%
Total	**14**	**100%**

4.3.10 The last question in this section was asking whether they rent radios for their vehicles, with 56% indicating that they do.

5 Views and Improvements

5 Views and Improvements

5.1 Your Views on the Trade

5.1.1 This section of the report covers both the driver questionnaire and the proprietor questionnaire, as the sections on 'Views on the Trade' and 'Improvements and Comments' are the same in both questionnaires. As shown Table 4.5 above, the majority of proprietors who responded to the questionnaire also drive their vehicles, and so it is possible their views are repeated under the driver's questionnaire and the proprietors.

5.1.2 General questions on the trade were asked in this section. Respondents were asked to give their view on the current number of licensed vehicles and how this met demand. The answers given are shown in Table 5.1. The results show that most taxi and private hire drivers feel there are too many licensed vehicles of both types. Proprietors supported this view.

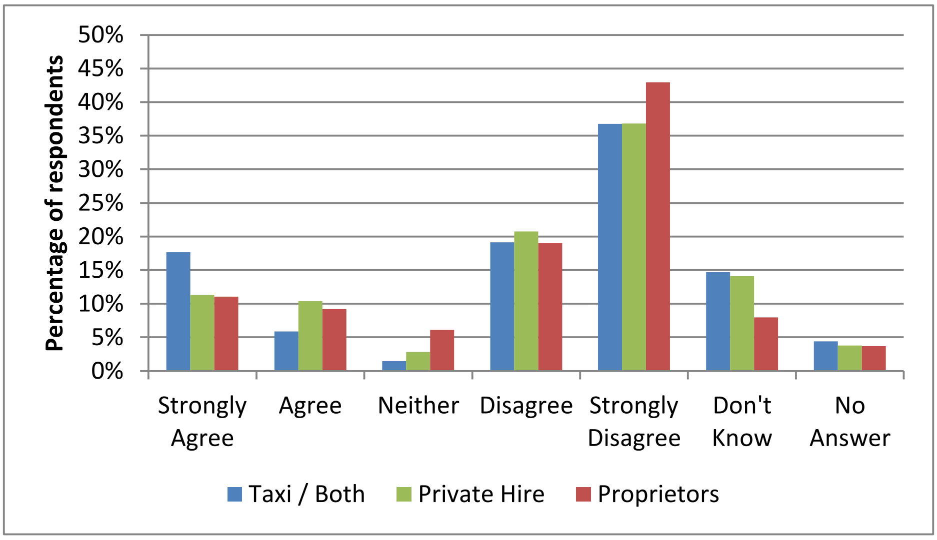
Table 5.1 – Do you think there are enough taxis to meet demand in Cardiff?

Respondent	Type	Too many	About right	Too few	No opinion	No Answer	Total
Taxi Drivers/Both	Taxi	75%	21%	0%	3%	1%	100%
	Private Hire	59%	13%	0%	1%	26%	100%
Private Hire Drivers	Taxi	70%	16%	4%	4%	7%	100%
	Private Hire	59%	23%	0%	5%	13%	100%
Proprietors	Taxi	75%	16%	2%	3%	4%	100%
	Private Hire	65%	14%	3%	2%	17%	100%

5.1.3 In comparison, the 2013 study asked the same question, where on average 85% said there were too many taxis and 7% said there were sufficient. Results for 2016 indicate that on average 73% think there are too many taxis and 17% consider the level to be about right. This shows an unchanged opinion overall from the previous survey, however there are now fewer people who consider there to be too many taxis. The results are similar across taxi and PHV drivers and vehicle proprietors. There has been an improved response rate for this question in the 2016 study.

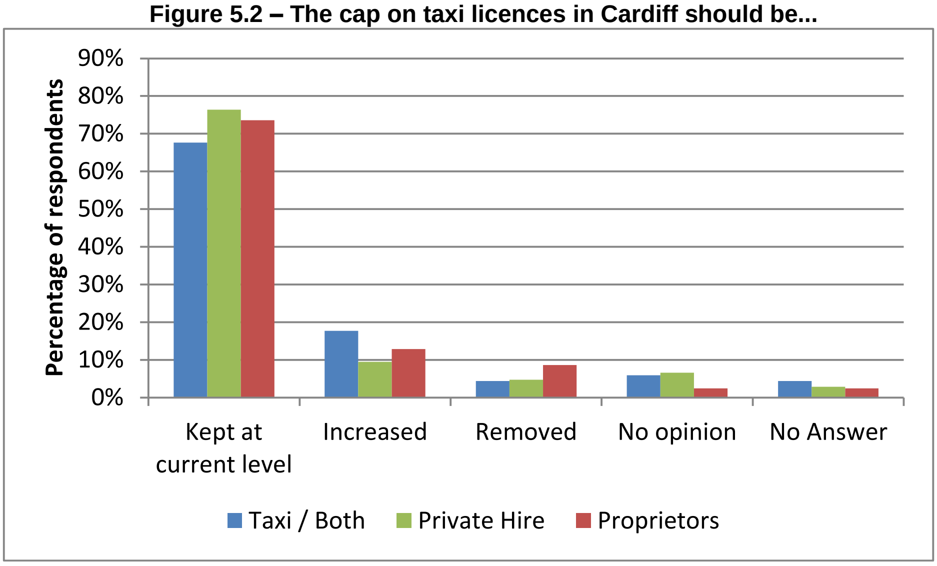
5.1.4 Respondents were next given the following statement, and were required to indicate their level of agreement with it: '*The cap on taxi licences in Cardiff has reduced the availability of taxis.*' The results given are in Figure 5.1. The results show the majority of respondents strongly disagreed with the statement, indicating they are in favour of the moratorium or have not seen any negative side effects from it. On a closer inspection of the results, all those who responded with 'strongly agree' or 'agree' had indicated there were either too many taxis or the number was about right.

Figure 5.1 – Level of agreement with the statement 'the cap on taxi licences in Cardiff has reduced the availability of taxis.'



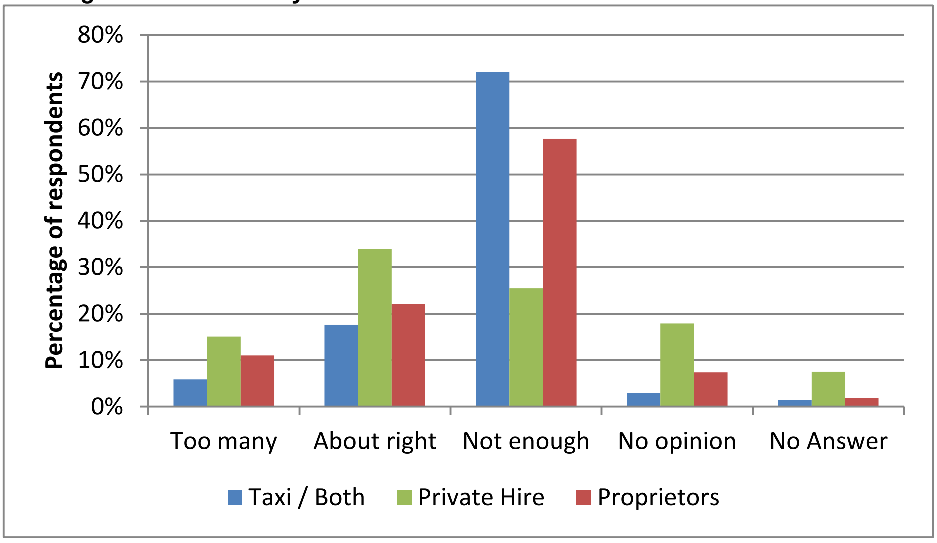
5.1.5 Respondents were then asked to indicate what should happen with the current cap on taxi licences and most drivers and proprietors said it should be kept at the current level. There was no option for decreasing the number of licences, however some completed driver questionnaires contained comments indicating they felt the level should be decreased. Of the 22 drivers and 21 proprietors who said the cap should be increased, 85% said they also felt there were too many taxis, suggesting a misunderstanding of the question. Similarly, of those who said they thought the cap should be removed, only one in 4 had previously indicated there were too few taxis with the majority stating there were too many.

Figure 5.2 – The cap on taxi licences in Cardiff should be...



5.1.6 The questionnaire next asked about the number of taxi ranks in Cardiff, and to list possible locations for new ranks. Figure 5.3 indicates taxi drivers feel there are not enough taxi ranks, whereas private hire drivers have a less pronounced view, with 'about right' the most common response. Proprietors' views echo taxi drivers with a majority suggesting that there are not enough ranks. The response 'about right' was the second most frequently chosen with 23% of the proprietor respondents.

Figure 5.3 – What is your view on the number of taxi ranks in Cardiff?



5.1.7 Those who suggested there were not enough ranks had the chance to suggest up to three new rank locations, although many chose to name more than three which were all included within the results. The most common responses from taxi drivers are listed in Table 5.2 below. Some private hire drivers also suggested locations where ranks could be improved, with the area of Castle Street / Kingsway / Duke Street cited as the most popular location followed by increased space at Central Station. Proprietors made some suggestions, although 53% did not suggest any location. Their most popular location for new ranks was Central Station followed by Castle Street and Cardiff bay, closely echoing taxi drivers' suggestions.

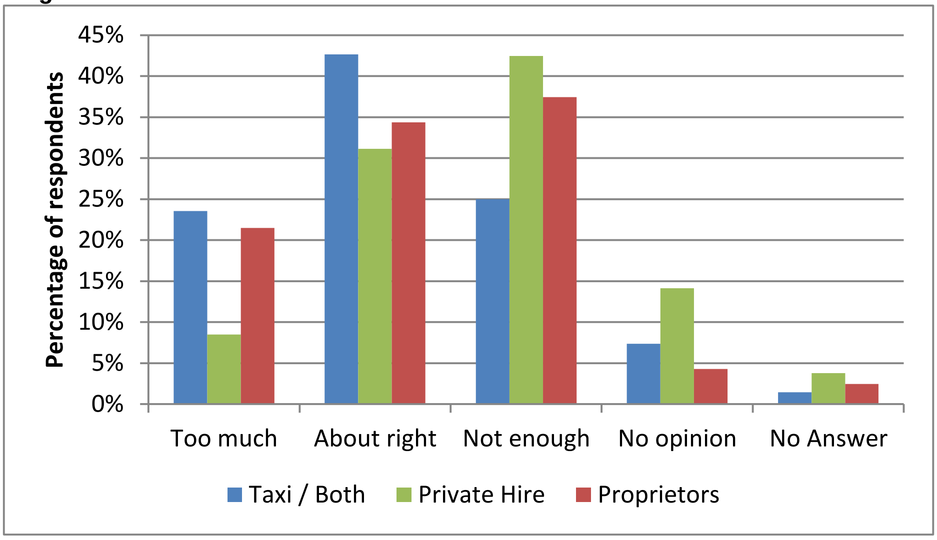
5.1.8 For comparison, the 2013 study asked for suggested new ranks with the top three listed being Castle Street, Cardiff Bay and Central Station respectively. Results would suggest that these areas are still currently under-served in terms of taxi rank locations/capacities as these three locations remain in the top 5 most suggested rank locations to improve with greater than 1 in 10 respondents suggesting at least one of these locations.

Table 5.2 – New rank locations suggested by taxi drivers

	Frequency	Percentage
Castle Street / Duke Street / Kingsway	19	39%
Central Station (increased space)	14	29%
Wood Street / Principality Stadium	9	18%
Cardiff Bay / Mermaid Quay / Millennium Centre	7	14%
Westgate St / St Mary St / The Philharmonic	5	10%
Albany Road	5	10%
City Road	2	4%
Queen Station	2	4%
Heath Hospital	2	4%
Cardiff Met University / Llandaff	2	4%
Victoria Park	2	4%
Windsor Place	2	4%
Salisbury Road	1	2%
Motorpoint Arena	1	2%
Park Place / Cathay / Student union	1	2%
Civic Centre	1	2%
Whitchurch	1	2%
Millicent Street	1	2%
Grangetown	1	2%
Increased space at Current ranks	0	0%
Other (in City Centre)	4	8%
Other (outside City Centre)	4	8%
Don't Know	1	2%
No Answer	7	14%

5.1.9 When asked about the level of enforcement currently on the trade in Cardiff, 43% of taxi drivers thought that the level of enforcement was about right with the remaining proportion being split between too much and too few. 42 % of private hire drivers believe that there is not enough enforcement. Proprietors gave a similar picture to private hire drivers, with most suggesting that there is not enough enforcement while a large proportion felt the enforcement is about right. The results are in Figure 5.4.

Figure 5.4 – View on the current level on enforcement on the trade in Cardiff



5.1.10 For comparison, licensed vehicle drivers in the 2013 study were asked about their views on the current level of enforcement on the trade within Cardiff and taxi drivers views were split fairly evenly between too much, about right and not enough. Private hire and Proprietors shared a similar pattern between 2013 and 2016 studies with the previous highest percentage response being 'not enough' which account for 47% and 44% of respondents respectively.

5.2 Improvements and Comments

5.2.1 The questionnaire ended with one section to write any improvements drivers would like to see to the trade, and another for any additional comments. On analysis, the comments in each section often overlapped and so have been combined to give the views on improvements all together. Overall, there was a high response rate for the open-ended questions, with only 14% of drivers not writing anything. Approximately 26% of proprietors did not offer any comments.

5.2.2 In order to see the difference in opinion, the responses have been split into:

- taxi drivers/both;
- private hire drivers and;
- proprietors.

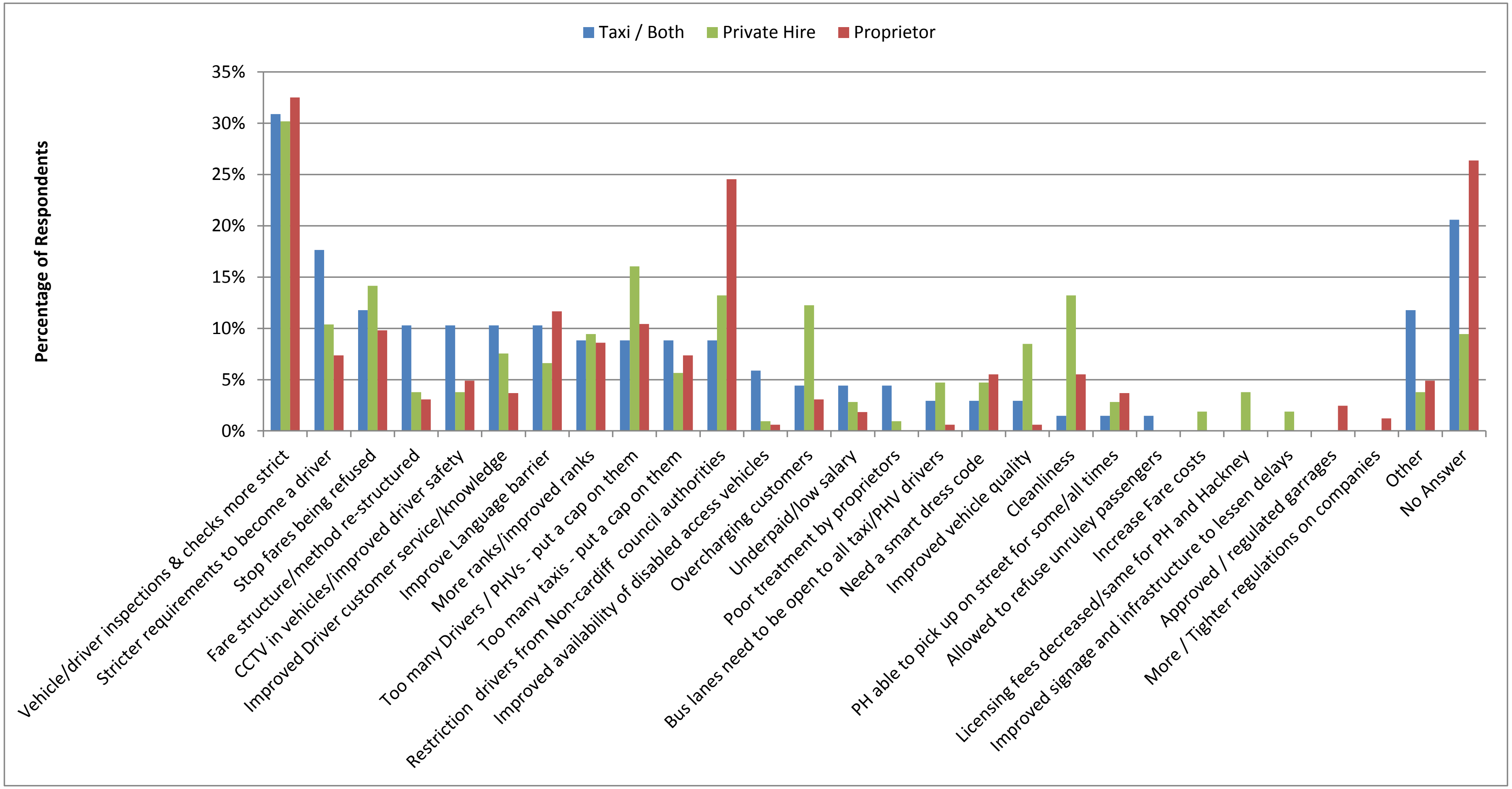


Figure 3.8 – Improvements and Comments

Number of Licensed Vehicles

5.2.3 Between 5-10% of respondents from each of the three groups provided comments that suggested that there are too many taxis in Cardiff. A more common comment was in relation to the number of drivers and PHVs being too high currently, with 16% of private hire drivers listing this concern. Some drivers wanted to see a cap on private hire vehicles introduced, although this isn't legally possible.

Enforcement

5.2.4 The most common comment from all groups surveyed was in relation to enforcement and checks on vehicles and drivers. Many drivers felt there was not enough enforcement currently on the condition of vehicles or on licensed drivers to ensure the correct person was driving the vehicle. Drivers do not feel that police and Council enforcement are doing enough, particularly not operating within times where they perceive these issues to be more prevalent. In this regards, drivers would like to see more frequent checks conducted by the Council and/or police, particularly at night time and weekends to stop private hire vehicles picking up off the streets, which is apparently more common at these times. Some drivers welcomed the idea of a licence suspension if drivers are found in the wrong.

Restrictions on Non-Cardiff based authorities operating within Cardiff

5.2.5 Restrictions on drivers and vehicles from outside Cardiff were the second highest comment from proprietors. Since the 2013 study, the popular online private hire service, Uber, which allows customers to submit a trip request via a smartphone app, has been introduced to Cardiff. Roughly 25% of proprietors see Uber as a particular threat to their business, citing concerns about the lack of driver knowledge of the area, the quality of vehicles used and the ease by which people can become an Uber driver in comparison with gaining a Taxi or PHV license. Their concerns are shared by a large portion of PHV vehicle drivers as well.

Driver Skills / Fares Refusals

5.2.6 The second highest comment by taxi drivers was in relation to driver skills, including English language, knowledge of the area and customer service. Many felt the standards were not high enough and that stricter regulations and tests should be in place before becoming a licensed driver. The third highest comment was in relation to drivers refusing fares on less desirable journeys, and this was highlighted by both drivers and proprietors as an issue which needs addressing through further enforcement.

Taxi Ranks

5.2.7 Other common comments included the number and size of taxi ranks being insufficient, with particular issues around the Central Square rank being removed and other ranks in the area not big enough to handle the number of taxis. Night time taxi ranks were also raised as an issue, with a desire for more ranks to serve the night time economy

Appearance and Safety

5.2.8 Many private hire drivers felt that vehicle cleanliness in particular is bad, and suggested improved vehicle quality. Some taxi drivers supported this also. Safety for drivers was raised with some drivers suggesting that there should be CCTV in all vehicles. Introducing a change to the fare structure or method of payment – for example paying up-front – was favoured, particularly by taxi drivers.

Overcharging

5.2.9 A number of respondents, particularly private hire drivers, felt that taxi drivers are overcharging customers and that this needs to be checked more rigorously. Some felt that private hire vehicles should be allowed to pick up customers on street during some peak times (e.g. weekend night times and event days) in order to pick up the surge in demand as a way to reduce the occurrence of overcharging. Opening bus lanes for private hire vehicles was also brought up as an improvement from which customers would benefit.

Other

5.2.10 Proprietors brought up a number of issues the drivers did not, such as using approved or regulated garages to assess vehicles and regulating the companies better, particularly in relation to Uber.

5.2.11 Three drivers indicated no improvements were required, and ‘Other’ comments were made in relation to other improvements or complaints, such as issues at specific ranks, general traffic flow in Cardiff, lack of taxi facilities, driver age limits and the monopoly of licenses held by large companies.

Comparison with 2013 Study

5.2.12 The 2013 study asked the same question about improvements to the trade, respondents were allowed to ask openly on what improvements they believed they wanted to see made to the taxi trade within Cardiff. The highest rating improvements at the time were to reduce the cap on all licensed vehicles, more frequent vehicle and driver inspections and stricter requirements to become a driver. Other listed improvements included additional ranks to be developed or originals increased in size as well as the appearance and safety of licensed vehicles on the whole. Most issues highlighted in the 2013 questionnaire were brought up in the 2016 survey independently, although there appears to have been a shift in the most pressing issues recorded with many concerns focussed around the introduction of Uber into the local market.

6 Summary and Conclusions

6 Summary and Conclusions

6.1 Introduction

6.1.1 Two questionnaires were completed in June and July 2016, one by drivers and the other by proprietors. There was an overlap where some proprietors also work as drivers, and this may have led to duplicated views. The response rate for driver questionnaires was 8.2%, and the response rate for proprietors was 13.0%.

6.1.2 The responses to the driver survey included 63 taxi drivers, 106 private hire drivers and 5 drivers who operate as both. Those who operate as both were analysed in combination with the taxi drivers, giving a total of 68 responses in the analysis. The proprietor analysis is based on 163 responses.

6.2 About You

6.2.1 The survey indicated that the gender of those working in the trade is dominantly male.

6.2.2 The working hours of private hire drivers average 44.5 hours compared to taxi drivers who work on average 39.6 hours. This has dropped slightly from the 2013 study.

6.2.3 Taxi drivers are more likely to work night times than private hire vehicles, whilst weekday daytime and weekend night time are the two most popular working times overall.

6.3 About Your Vehicle

6.3.1 Just over half of vehicles are low emissions according to drivers and approximately half according to proprietors. The majority of taxis are wheelchair accessible, however there continue to be very few wheelchair accessible private hire vehicles.

6.3.2 A total of 74% of taxi drivers and 82% private hire vehicle drivers indicated that they owned their own vehicle. As 84% of proprietors also drove their vehicles, an overlap of responses between drivers and proprietors is likely. The majority of proprietors who responded (87%) owned only one licensed vehicle.

6.4 About Your Business

6.4.1 St Mary Street, Greyfriars Road/Hilton Hotel and Park Place were the most frequented ranks by taxi drivers. The top suggestions for new or increased capacity ranks included Castle Street and Central Station area.

6.4.2 Average wait time between fares is above 15 minutes for the majority of drivers in all day types and times. The only time a noticeable proportion of drivers wait for less than 15 minutes is on weekend night times.

6.4.3 A high proportion of taxi drivers have been attacked in the last 12 months; either verbally or physically. The number of private hire drivers attacked is lower, but a third have been verbally attacked in the last 12 months.

6.5 Your Views on the Trade

6.5.1 A high proportion of all respondents felt there are too many drivers and private hire vehicles in Cardiff, with a smaller number feeling there are too many taxis.

6.5.2 The majority of all respondents disagreed with the statement ‘The cap on taxi licences in Cardiff has reduced the availability of taxis.’ This indicates the view is that the cap has not had a negative effect on the industry. Respondents gave a majority vote to the cap being kept at the current level, rather than removed or increased.

6.5.3 Taxi drivers and proprietors feel there are not enough taxi ranks in Cardiff, whilst private hire drivers were split between there not being enough or the number being about right.

6.5.4 The most popular view on enforcement in Cardiff from taxi drivers is that it is about right, while private hire drivers and proprietors feel slightly more that there is not enough, although many felt the level is about right.

6.5.5 Many comments and improvements were left by most respondents. The top four comments or suggestions across all respondents were as follows:

- Stricter vehicle and/or driver inspections and checks required.
- Stricter requirements required to become a driver.
- Enforcement to stop fares being refused.
- Too many drivers and/or private hire vehicles in Cardiff – introduce caps.

6.5.6 Many other comments were made, as highlighted in Section 5 of this report.

Appendix A:
Driver Questionnaire

Cardiff Taxi Study

Driver Survey

We are collecting this information to help inform an independent review of taxi and private hire vehicle operations in Cardiff, on behalf of Cardiff Council. The information collected will be reported at an aggregated level and no individual responses will be identifiable.

ABOUT YOU

1. Please indicate your gender:
(Please tick one box only)

Male ☐ Q1.1 Female ☐ Q1.2 Prefer not to say ☐ Q1.3

2. How many years have you been a licensed vehicle driver? ☐ Q2.1

3. For how many years have you been working as a licensed vehicle driver in Cardiff? ☐ Q3.1

4. Do you have any formal qualifications or training related to the taxi/private hire industry?
(Please tick all that apply)

BTEC Level 2 (Transporting Passengers by Taxi and Private Hire) ☐ Q4.1 Disability Awareness Training ☐ Q4.2

NVQ Level 2 (Road Passenger Vehicle Driving) ☐ Q4.3 Other Qualification ☐ Q4.4

5. On average how many hours per week do you work as a licensed vehicle driver? ☐ Q5.1

6. What days do you normally work?
(Please tick all that apply)

Weekday Daytime (Mon-Fri, 07:00-19:00) ☐ Q6.1

Weekday Nighttime (Mon-Thu, 19:00-07:00) ☐ Q6.2

Weekend Daytime (Sat, 07:00-19:00) ☐ Q6.3

Weekend Nighttime (Fri and Sat, 19:00-07:00) ☐ Q6.4

Sunday Daytime (Sun, 07:00-19:00) ☐ Q6.5

Sunday Nighttime (Sun, 19:00-07:00) ☐ Q6.6

ABOUT YOUR VEHICLE

7. What type of vehicle do you currently drive?
(Please tick one box only)

Taxi (Hackney Carriage) ☐ Q7.1 Private Hire Vehicle ☐ Q7.2 Both ☐ Q7.3

8. Which of the following best describes your vehicle?
(Please tick one box only)

Saloon Car ☐ Q8.1 London Black Cab ☐ Q8.2 People Carrier/Minibus ☐ Q8.3

9. Is your vehicle wheelchair accessible?
(Please tick one box only)

Yes ☐ Q9.1 No ☐ Q9.2

10. Is your vehicle low emissions?
(Please tick one box only)

Yes ☐ Q10.1 No ☐ Q10.2

11. Do you own or rent your vehicle?
(Please tick one box only)

Own ☐ Q11.1 Rent ☐ Q11.2

12a. Do you share the vehicle with other drivers?
(Please tick one box only)

Yes ☐ Q12.1 No ☐ Q12.2

12b. If yes, how many drivers other than yourself share the vehicle? ☐ Q12.3

13. Do you rent a radio?
(Please tick one box only)

Yes ☐ Q13.1 No ☐ Q13.2

Cardiff Taxi Study

ABOUT YOUR BUSINESS

14. Approximately what PERCENTAGE of your fares are attained using the following methods of hire:
(Please ensure your answers add up to 100%)

Pick-up at a rank ☐ Q14.1 Pre-booked ☐ Q14.2

Flagged down ☐ Q14.3 Contract ☐ Q14.4

15. If you drive a Taxi, do you take private bookings?
(Please tick one box only)

Yes ☐ Q15.1 No ☐ Q15.2

16. Which of the following taxi ranks do you most frequently visit?
(Please specify a maximum of 3 locations)

________________ Q16.1

________________ Q16.2

________________ Q16.3

17. Approximately what PERCENTAGE of your fares fall into the following categories?
(Please ensure your answers add up to 100%)

£0 - £4.99 ☐ Q17.1 £5 - £9.99 ☐ Q17.2 £10 - £14.99 ☐ Q17.3

£15 - £19.99 ☐ Q17.4 £20+ ☐ Q17.5 Don't Know ☐ Q17.6

18. During the following time periods, how long do you have to wait on average between fares?
(Please tick a maximum of one box per time period only)

	< 5 mins	5-10 mins	10-15 mins	> 15 mins
Weekday Daytime (Mon-Fri, 07:00-19:00)	☐ Q18.1	☐ Q18.2	☐ Q18.3	☐ Q18.4
Weekday Nighttime (Mon-Thu, 19:00-07:00)	☐ Q18.5	☐ Q18.6	☐ Q18.7	☐ Q18.8
Weekend Daytime (Sat, 07:00-19:00)	☐ Q18.9	☐ Q18.10	☐ Q18.11	☐ Q18.12
Weekend Nighttime (Fri and Sat, 19:00-07:00)	☐ Q18.13	☐ Q18.14	☐ Q18.15	☐ Q18.16
Sunday Daytime (Sun, 07:00-19:00)	☐ Q18.17	☐ Q18.18	☐ Q18.19	☐ Q18.20
Sunday Nighttime (Sun, 19:00-07:00)	☐ Q18.21	☐ Q18.22	☐ Q18.23	☐ Q18.24

19. How many times in a typical week do you carry disabled passengers ?
(Please tick one box only)

7+ ☐ Q19.1 4-6 ☐ Q19.2 2-3 ☐ Q19.3

1 ☐ Q19.4 <1 ☐ Q19.5 Never ☐ Q19.6

20. Have you been the victim of an attack from a passenger in the last 12 months?
(Please tick one box only)

Physically Attacked ☐ Q20.1 Verbally Attacked ☐ Q20.2 Not Attacked ☐ Q20.3

Cardiff Taxi Study

YOUR VIEWS ON THE LICENSED VEHICLE TRADE

21. Do you think there are enough licensed vehicles to meet demand in Cardiff?
(Please tick one box per type of taxi only)

	Too many	About right	Too few	No opinion
Taxis	☐ Q21.1	☐ Q21.2	☐ Q21.3	☐ Q21.4
Private Hire Vehicles	☐ Q21.5	☐ Q21.6	☐ Q21.7	☐ Q21.8

22. Please indicate your level of agreement with the following statement:
The cap on Taxi licences in Cardiff has reduced the availability of Taxis.
(Please tick one box only)

Strongly Agree ☐ Q22.1 Agree ☐ Q22.2 Neither ☐ Q22.3
Disagree ☐ Q22.4 Strongly Disagree ☐ Q22.5 Don't Know ☐ Q22.6

23. Please indicate which of the following statements you most agree with:
The cap on Taxi licences in Cardiff should be...
(Please tick one box only)

Kept at current level ☐ Q23.1 Increased ☐ Q23.2 Removed ☐ Q23.3
No opinion ☐ Q23.4

24a. What is your view on the number of taxi ranks in Cardiff?
(Please tick one box only)

Too many ☐ Q24.1 About right ☐ Q24.2 Not enough ☐ Q24.3
No opinion ☐ Q24.4

24b. If you answered 'Not enough', where would you like to see new ranks created in Cardiff?
(Please specify a maximum of 3 locations)

____________________ Q24.5
____________________ Q24.6
____________________ Q24.7

25. What is your view on the current level of enforcement on licensed vehicles in Cardiff?
(Please tick one box only)

Too much ☐ Q25.1 About right ☐ Q25.2 Not enough ☐ Q25.3
No opinion ☐ Q25.4

Cardiff Taxi Study

YOUR VIEWS ABOUT HOW THE LICENSED VEHICLE TRADE COULD BE IMPROVED

26. Please list any improvements you would like to see to licensed vehicle trade in Cardiff.
(Please consider the following topics: vehicle/driver inspection and enforcement; restrictions on private hire vehicles; driver training standards; licensing administration)

YOUR COMMENTS

27. Do you have any other comments relating to the licensed vehicle trade in Cardiff?

Please return your completed survey form by 20th May 2016 in the pre-paid envelope provided. Forms received after this date will not be included in the study report.

Appendix B:
Proprietor Questionnaire

Cardiff Taxi Study

Proprietor Survey

We are collecting this information to help inform an independent review of taxi and private hire vehicle operations in Cardiff, on behalf of Cardiff Council. The information collected will be reported at an aggregated level and no individual responses will be identifiable.

ABOUT YOU

1. Please indicate your gender:
(Please tick one box only)

Male ☐ Q1.1 Female ☐ Q1.2 Prefer not to say ☐ Q1.3

ABOUT YOUR VEHICLE(S)

2. How many licensed vehicles do you own? ☐ Q2.1

3. How many of each type of vehicle do you currently own?

Taxi (Hackney Carriage) ☐ Q3.1 Private Hire Vehicle ☐ Q3.2

4. Please indicate how many of your vehicles best meet the following descriptions.
(If you own one vehicle, this will be 100% in one box. If you own more than one vehicle, please make sure the numbers add up to 100%)

Saloon Car ☐ Q4.1 London Black Cab ☐ Q4.2 People Carrier/Minibus ☐ Q4.3

5. How many of your vehicles are wheelchair accessible? ☐ Q5.1
(Percentage)

6. How many of your vehicles are low emissions? ☐ Q6.1
(Percentage)

7a. Do you drive or rent out your vehicle(s)?
(Please tick one box only)

Drive ☐ Q7.1 Rent ☐ Q7.2 Both ☐ Q7.3

7b. If you rent out your vehicle(s), how many drivers do you rent to? ☐ Q7.4

8. Do you rent a radio(s) for your vehicle(s)? Yes ☐ Q8.1 No ☐ Q8.2
(Please tick one box only)

Cardiff Taxi Study

YOUR VIEWS ON THE LICENSED VEHICLE TRADE

9. Do you think there are enough licensed vehicles to meet demand in Cardiff?
(Please tick one box per type of vehicle only)

	Too many	About right	Too few	No opinion
Taxis	☐ Q9.1	☐ Q9.2	☐ Q9.3	☐ Q9.4
Private Hire Vehicles	☐ Q9.5	☐ Q9.6	☐ Q9.7	☐ Q9.8

10. Please indicate your level of agreement with the following statement:
The cap on Taxi licences in Cardiff has reduced the availability of Taxis.
(Please tick one box only)

Strongly Agree ☐ Q10.1 Agree ☐ Q10.2 Neither ☐ Q10.3
Disagree ☐ Q10.4 Strongly Disagree ☐ Q10.5 Don't Know ☐ Q10.6

11. Please indicate which of the following statements you most agree with:
The cap on Taxi licences in Cardiff should be...
(Please tick one box only)

Kept at current level ☐ Q11.1 Increased ☐ Q11.2 Removed ☐ Q11.3
No opinion ☐ Q11.4

12a. What is your view on the number of taxi ranks in Cardiff?
(Please tick one box only)

Too many ☐ Q12.1 About right ☐ Q12.2 Not enough ☐ Q12.3
No opinion ☐ Q12.4

12b. If you answered 'Not enough', where would you like to see new ranks created in Cardiff?
(Please specify a maximum of 3 locations)

________________________________ Q12.5
________________________________ Q12.6
________________________________ Q12.7

13. What is your view on the current level of enforcement on licensed vehicles in Cardiff?
(Please tick one box only)

Too much ☐ Q13.1 About right ☐ Q13.2 Not enough ☐ Q13.3
No opinion ☐ Q13.4

Cardiff Taxi Study

YOUR VIEWS ABOUT HOW THE LICENSED VEHICLE TRADE COULD BE IMPROVED

14. Please list any improvements you would like to see to taxi and/or private hire vehicle trade in Cardiff.
(Please consider the following topics: vehicle/driver inspection and enforcement; restrictions on private hire vehicles; driver training standards; licensing administration)

YOUR COMMENTS

15. Do you have any other comments relating to the licensed vehicle trade in Cardiff?

Please return your completed survey form by 20th May 2016 in the pre-paid envelope provided. Forms received after this date will not be included in the study report.

AECOM

Cardiff Taxi Licensing Study 2016

Part 4: Summary Report

Cardiff Council

29 September 2016

Prepared by: Ellena Caudwell.................................... Checked by: John Webber....................................

Verified by: George Lunt.. Approved by: George Lunt.....................................

Cardiff Taxi Licensing Study 201: Part 4: Summary Report

Rev No	Comments	Checked by	Approved by	Date
1	Issue 1	JW	GL	29/09/2016

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1 Introduction

Capabilities on project:
Transportation

1 Introduction

1.1 Background

1.1.1 Cardiff Council (CC) controls the issuing of taxi licences in Cardiff. Following a previous study in 2010 where there was no evidence of significant unmet demand, the Council imposed a moratorium on the issue of new taxi licences. This restriction was left in place following a further study in 2013.

1.1.2 Under Department for Transport (DfT) Taxi and Private Hire Vehicle Licensing Best Practice Guidance[1], a new study is required at a maximum interval of three years when a quantity restriction is in place. A new study is now due.

1.1.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.

1.1.4 The term 'Taxi' is commonly used to refer to both Hackney Carriages and Private Hire Vehicles (PHVs). However, for clarification, in this report the term 'Taxi' is used to refer to Hackney Carriages in line with the Law Commission report titled 'Taxi and Private Hire Services'[2]. Where the report includes analysis that refers to PHVs, this will be clearly stated.

1.2 Study Objectives

1.2.1 The main objectives of the study are as follows:

- To identify the current level of demand for taxis within Cardiff;
- To assess whether the supply of taxis matches the demand;
- To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
- To identify areas of the service that could be improved.

1.2.2 In order to meet these objectives six different surveys have been undertaken. These surveys are described in three separate reports, with one overriding report summarising all the information and drawing the key conclusions and making recommendations. The four reports are listed below:

Report	**Surveys**
Cardiff Taxi Licensing Study 2016: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2016: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2016: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2016: Part 4: Summary Report	• Summary of the above surveys

1.2.3 This report is the Summary Report which summarises the key findings from each of the three above mentioned reports, and provides the recommendations with regards to the future regulation of taxi licences in Cardiff.

1.3 Report Structure

1.3.1 Following this introduction, the summary document is structured as follows:

- Section 2 provides a summary of the findings in each of the three reports;
- Section 3 sets out the recommendations resulting from the analysis of all five surveys within the three reports.

[1] https://www.gov.uk/government/publications/taxi-and-private-hire-vehicle-licensing-best-practice-guidance
[2] https://www.gov.uk/government/publications/taxi-and-private-hire-services

2 Summary

2 Summary

2.1 Part 1: Taxi Rank Operations and Public Attitude Survey

2.1.1 The Taxi Rank Operations Surveys showed that effective taxi demand and taxi supply generally follow a similar profile across the weekday, weekend and Sunday periods. However a clear oversupply of taxis can be seen across the network. Analysis of passenger delay showed the majority of passengers experienced minimal delays, apart from a few anomalous occasions (e.g. at Sophia Gardens or an instant of a passenger waiting at a rarely used rank with sufficient supply at nearby ranks). Conversely, average taxi delay was in excess of 5 minutes, with wait times of over two hours recorded in some instances.

2.1.2 The Public Attitude Survey highlighted a possible lack of understanding of the difference between taxis and private hire vehicles, and little knowledge of the taxi fare structure in Cardiff, however, there was little consensus regarding improvements to services or the location of new taxi ranks.

2.1.3 There was no strong evidence that the moratorium imposed in 2010 and upheld in 2013 has had a detrimental impact on the availability of taxis according to responses from the public attitude survey. This is supported by the analysis of market conditions, which shows a large amount of unused supply and no significant unmet demand with passenger delay times largely unchanged from 2013 to 2016.

2.2 Part 2: Driver and Proprietor Attitude Survey

2.2.1 The driver survey analysis indicates that private hire vehicle drivers generally work longer hours than taxi drivers. The daytime market is dominated by private hire vehicles, whilst the nighttime economy is largely worked by taxis. The average number of hours worked by taxi drivers in a typical week has dropped slightly since the 2013 study, from 41.7 hours to 39.6 hours per week.

2.2.2 The majority of drivers who responded own their vehicle, and the majority of proprietors who responded to the survey also drive their vehicle.

2.2.3 Average wait times between fares are usually over 15 minutes for every day type, with the shortest wait times on a weekend nighttime. The responses to the survey indicate that many drivers and proprietors feel there are too many licensed vehicles currently in Cardiff, with the majority of the opinion that the moratorium on the issue of new taxi licences should be maintained.

2.2.4 Many drivers and proprietors feel there are not enough taxi ranks in Cardiff and/or that some of the existing ranks are not large enough – in particular in the Castle Street and Central Station areas.

2.2.5 Suggested improvements include stricter and more frequent inspections and checks on vehicle and drivers, more stringent requirements to become a driver, greater enforcement to stop taxi fares being refused and reducing the number of licensed vehicles in Cardiff.

2.2.6 A concern over vehicles from outside Cardiff being used was raised from drivers and proprietors alike, particularly in relation to Uber, and a requirement for all drivers and vehicles to be regulated to the same standards was popular.

2.3 Part 3: Operator and Stakeholder Attitude Survey

2.3.1 A wide range of stakeholders in the Cardiff licensed vehicle Industry were approached to participate in the survey. Eleven stakeholders completed the online questionnaire. Given the sample size the views expressed may not be representative of all stakeholders in the industry in Cardiff, but give an indication of views across a cross-section of users.

2.3.2 The stakeholders interviewed used a mixture of taxis and private hire vehicles. There was a general feeling amongst stakeholders that there is an adequate supply of licensed vehicles in Cardiff, with a consensus that there has been an increase in the number of available vehicles compared to three years ago.

2.3.3 In general, stakeholders perceived little difference between private hire vehicle drivers and taxi drivers for their knowledge of the city centre, driving skills, customer service and personal safety and security, although there was some concern over the quality and cleanliness of taxis in comparison with PHVs.

2.3.4 An online questionnaire was completed by three licensed vehicle operators. The operators generally felt that there were either the right number or too many taxis in Cardiff, but all felt there are not enough PHVs in Cardiff. There were mixed views on the number and size of taxi ranks, and two of the three operators felt stricter enforcement on vehicles standards and quality of drivers is required.

2.4 Level of Licensed Vehicle Supply

2.4.1 There is a general consensus across all surveys and reports that the number of taxis in Cardiff is either adequate or too high. There is no evidence to indicate the presence of significant unmet demand or that the travelling public have been disadvantaged by the introduction of the moratorium on the issue of new taxi licences in 2010, nor the subsequent decision to uphold the moratorium in 2013. In fact, the results of the various studies and the analysis of current market conditions indicate that the presence of significant unused supply.

2.5 Other Common Themes

2.5.1 Comments from those working within the trade show a perception that there is a lack of effective enforcement on taxis refusing fares for short journeys or disabled users and that more stringent inspections on vehicles and drivers are required.

2.5.2 There is some concern that there are too few taxi ranks in the City and that some existing ranks have insufficient capacity.

2.5.3 Some of these themes were supported by those outside the trade, with recommendations from the public on improving enforcement and customer service, and stakeholder comments on improving customer service and concern over taxi drivers refusing fares.

3 Recommendations

3 Recommendations

3.1 Key Recommendation

3.1.1 **Taxi License Moratorium:** The key recommendation of this study is that Cardiff Council should maintain the current moratorium on the issue of new taxi licences in Cardiff, except where there is need in the future for additional licences in the event that Section 161 of the Equalities Act 2010[3] is brought into force.

3.2 Further Considerations

3.2.1 In addition to the headline recommendation above, the surveys consistently showed issues within three key areas that need to be considered more closely:

Enforcement

3.2.2 There was strong consensus across the industry that enforcement (or perception of enforcement) needs to be improved. In particular in the following three areas:

- Vehicle standards;
- Driver regulation; and
- Taxi drivers refusing fares.

Driver and Vehicle Regulation

3.2.3 There was common view that customer service from drivers could be improved, which could be achieved through enforcement or potentially through quality driver training across the board to ensure all drivers are at a similar level. There was also concern over vehicles from outside Cardiff operating in the city, particularly in relation to Uber, and the requirement for all vehicles to achieve the same standards and regulations would be beneficial to both passengers and the industry.

Taxi Ranks

3.2.4 There was common agreement that some areas lacked taxi ranks or that existing ranks were of insufficient size. It is recommended these are reviewed, possibly in line with the current works in the city centre, to provide for the future requirements of passengers, and in particular in the following areas:

- The area surrounding Central Station;
- Caste Street/Duke Street; and
- Cardiff Bay.

Communication with the Trade

3.2.5 In order to help deliver on the above, it is suggested that the findings of the report and these points of consideration are discussed with the licensed vehicle trade and other stakeholders at a Cardiff Licensed Vehicles Working Group. This will help to ensure that the key issues are identified and clearly understood, and help with the formation of joint strategies that are targeted, deliverable and will ultimately improve the service to existing and future passengers.

[3] The Equalities Act 2010 Section 161 will require local authorities to issue additional taxi licences where the authority has fewer than a prescribed number of wheelchair accessible vehicles.