

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.....

Verified by: John Webber

Approved by: John Webber.....

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

Rev No	Comments	Checked by	Approved by	Date
1	Issue 1	EC	JW	20/09/2016

1 Callaghan Square, Cardiff, CF10 5BT
Telephone: 029 2067 4600 Website: <http://www.aecom.com>

Job No 60484283

Reference M001.001

Date Created September 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 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	<ul style="list-style-type: none"> • Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2016: Part 2: Driver and Proprietor Attitude Survey	<ul style="list-style-type: none"> • Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2016: Part 3: Operator and Stakeholder Attitude Survey	<ul style="list-style-type: none"> • Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2016: Part 4: Summary Report	<ul style="list-style-type: none"> • 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 Guidance¹, 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.
- 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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- 1.2.3 This report is the Driver and Proprietor Attitude Survey which analyses two of the six surveys which have taken place; licensed driver questionnaires and vehicle 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.

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 applicable³. 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

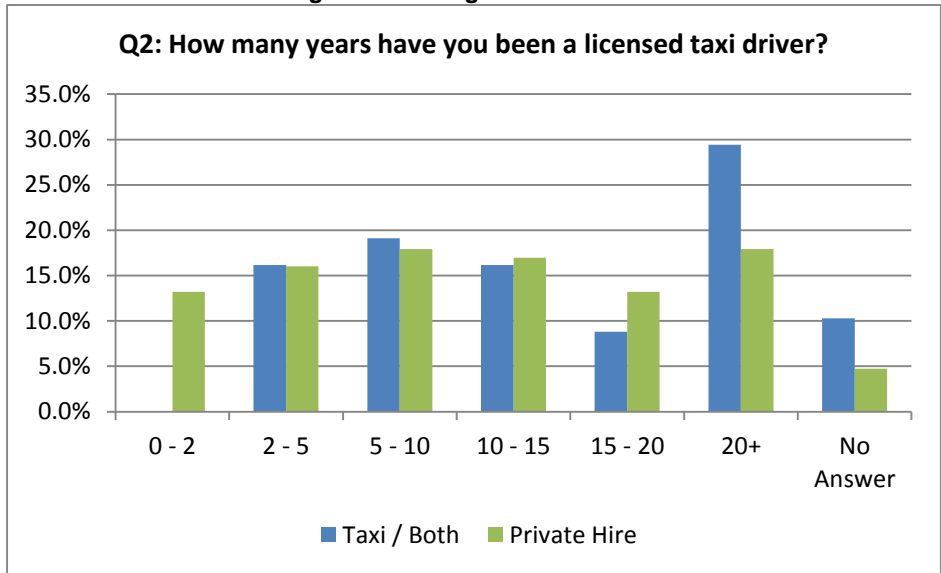
3.2.1 Table 3.1 shows the respondents by type and gender. This shows the trade is dominantly a male workplace.

Table 3.1 – Gender of Respondents

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

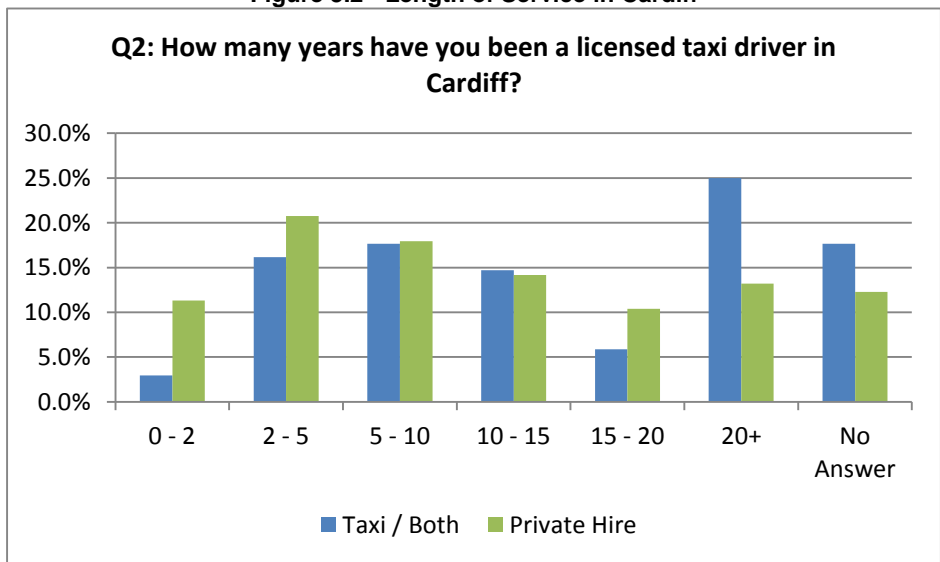
3.2.2 Respondents were asked how long they had worked as a licensed vehicle driver. Figure 3.1 below shows the breakdown of responses by the length of service. The length is similar for taxi and private hire. No respondents had held a taxi license or both for less than two years. This sample suggests 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.

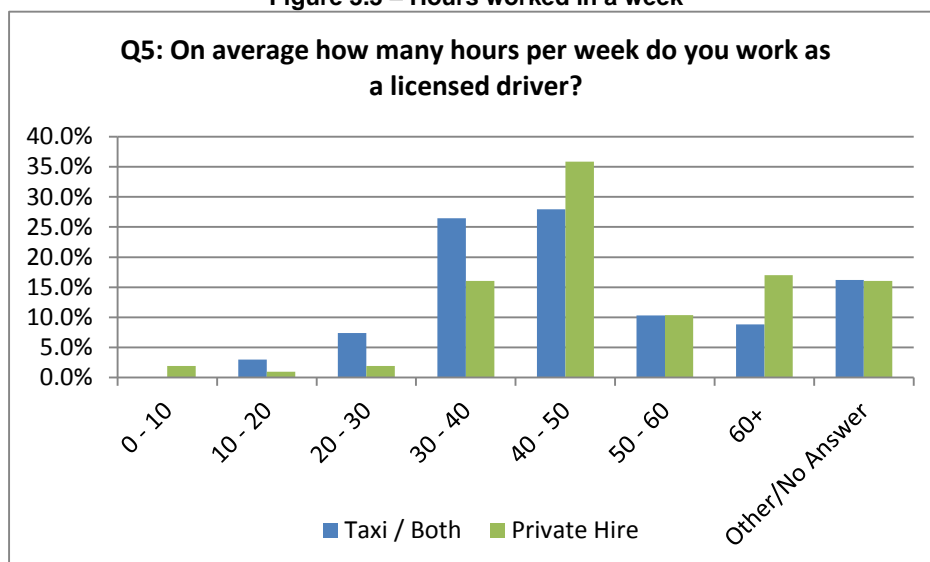
Table 3.2 – Driver Qualifications

	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

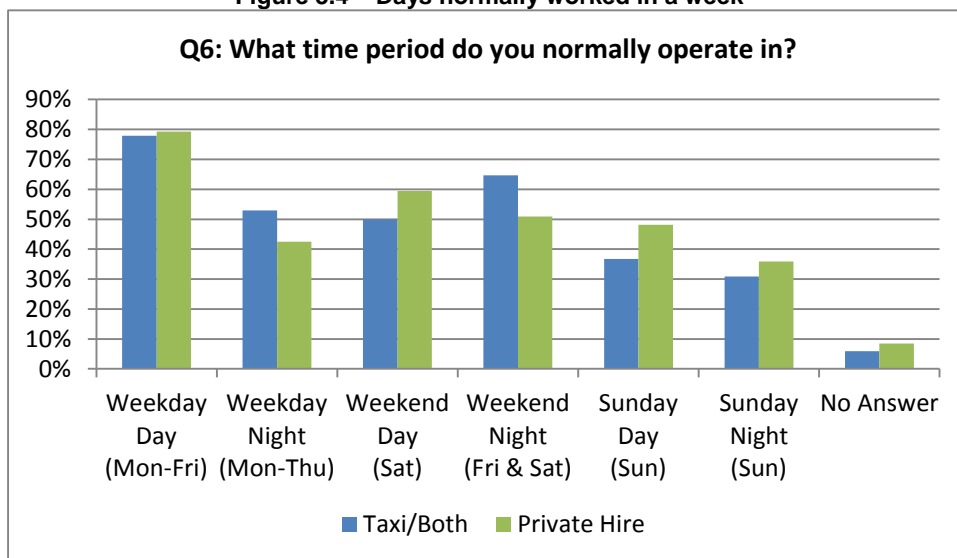


3.2.7 Respondents were asked which days they usually worked, with set time periods defined. Daytime was considered to be between 07:00 and 19:00, and night time between 19:00 and 07:00. The results are displayed in Figure 3.4. They show many taxi drivers work on weekday daytimes and weekend night times, 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.

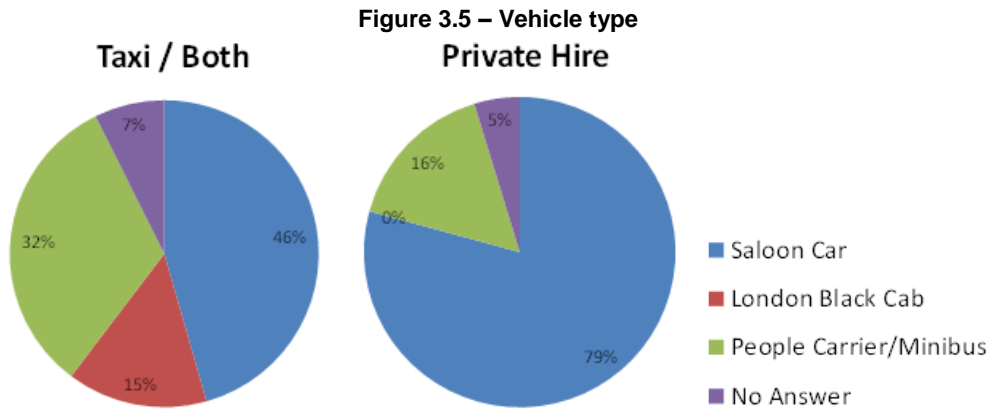
Figure 3.4 – Days normally worked in a week



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.



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%

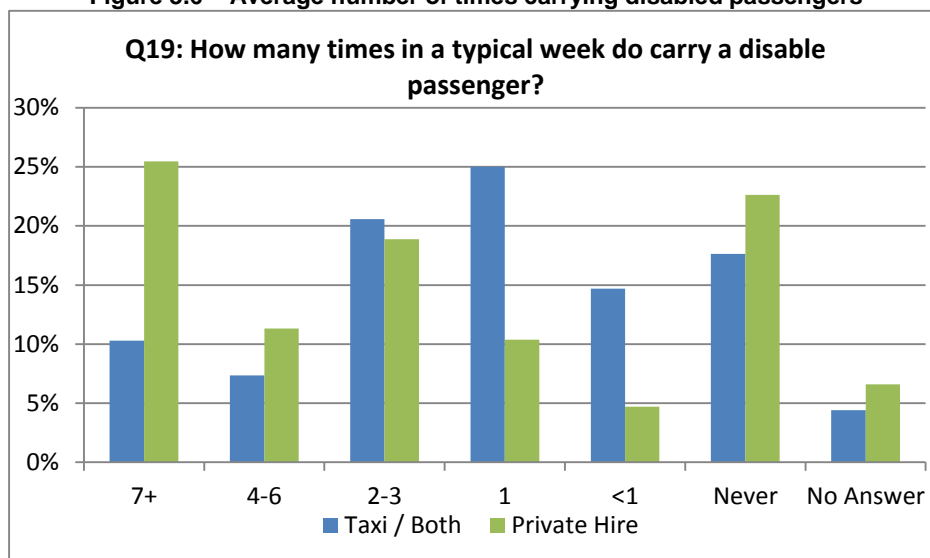
- 3.4.3 All drivers were asked to indicate how long they have to wait on average between fares. This was broken down into the same day type categories as in Figure 3.4. The results in Table 3.8 show the results in percentages related to the total number of respondents for each licensing type. Where there 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				Total
	<5 mins	5-10 mins	10-15 mins	>15 mins	
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

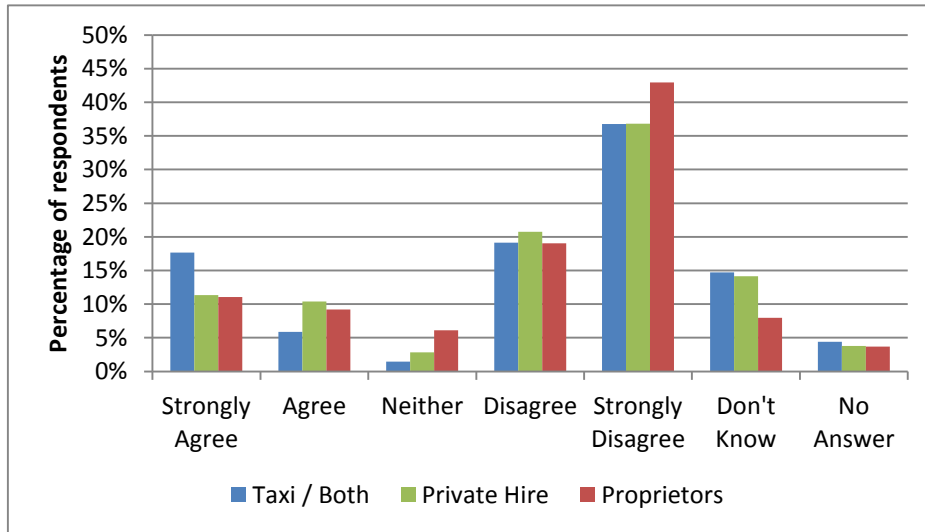
- 5.1.1 This section of the report covers both the driver questionnaire and the proprietor questionnaire, as the sections on 'Views on the Trade' and 'Improvements and Comments' are the same in both questionnaires. As shown Table 4.5 above, the majority of proprietors who responded to the questionnaire 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%

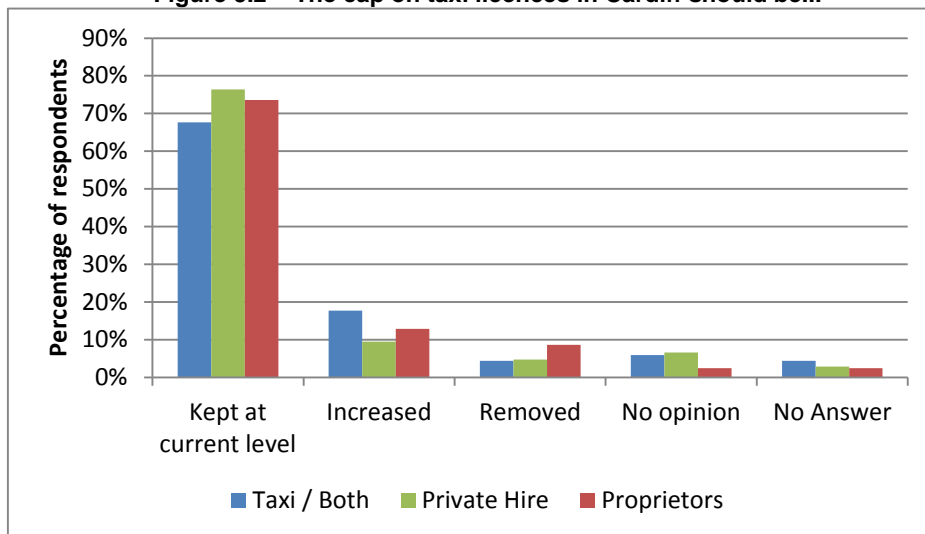
- 5.1.3 In comparison, the 2013 study asked the same question, where on average 85% said there were too many taxis and 7% said there were sufficient. Results for 2016 indicate that on average 73% think there are too many taxis and 17% consider the level to be about right. This shows an unchanged opinion 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.’



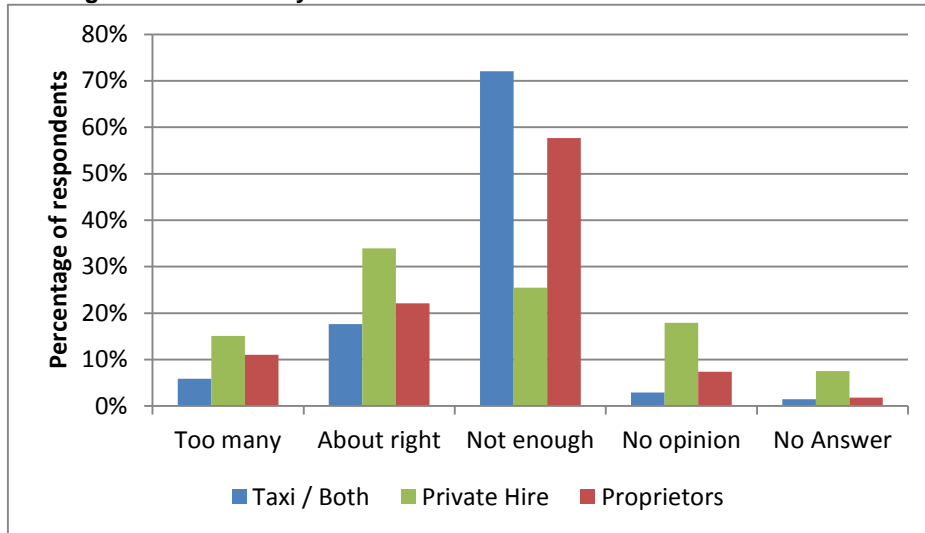
5.1.5 Respondents were then asked to indicate what should happen with the current cap on taxi licences and most drivers and proprietors said it should be kept at the current level. There was no option for decreasing the number of licences, however some completed driver questionnaires contained comments 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?



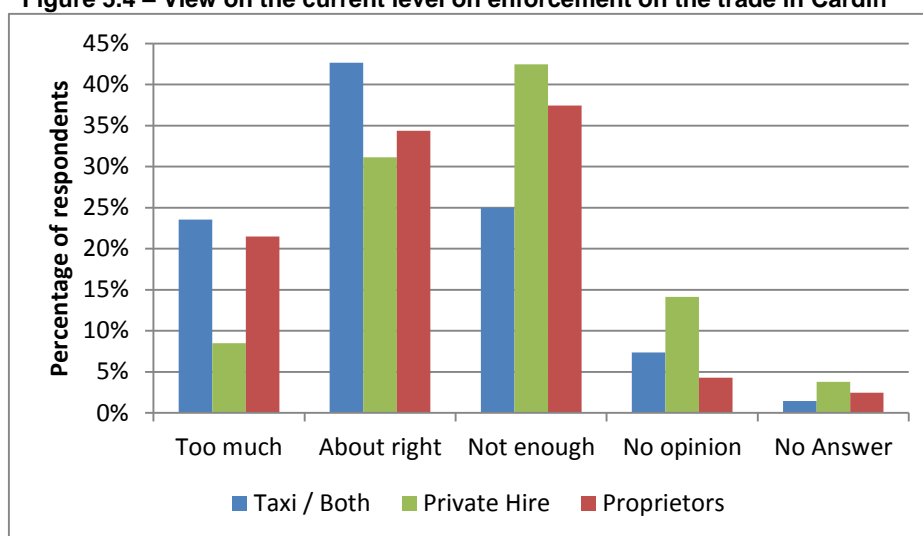
- 5.1.7 Those who suggested there were not enough ranks had the chance to suggest up to three new rank locations, although many chose to name more than three which were all included within the results. The most common responses from taxi drivers are listed in Table 5.2 below. Some private hire drivers 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.

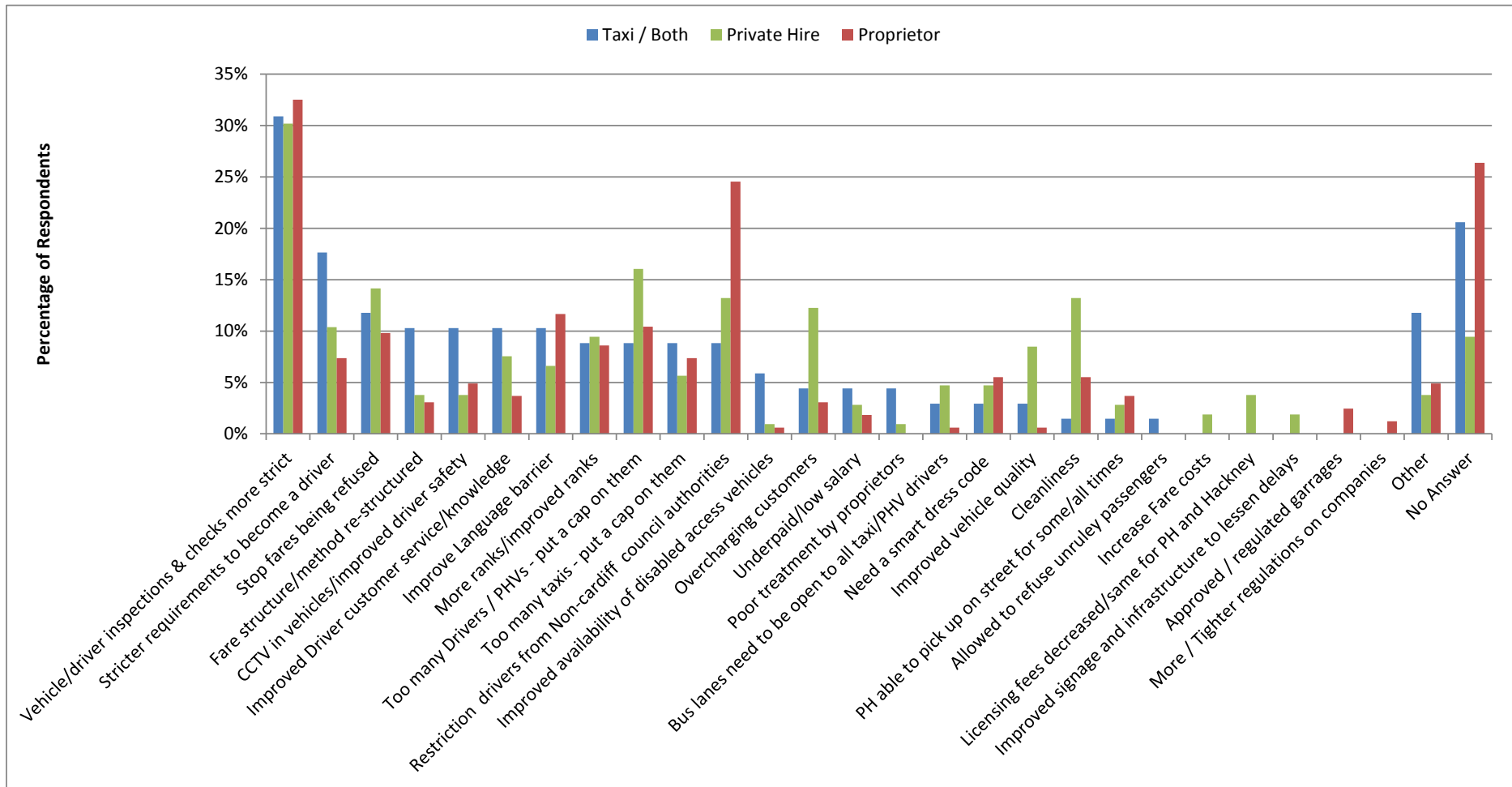


Figure 3.8 – Improvements and Comments

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)

Weekday Daytime (Mon-Fri, 07:00-19:00)

< 5 mins Q18.1

5-10 mins Q18.2

10-15 mins Q18.3

> 15 mins 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	<input type="checkbox"/> Q21.1	<input type="checkbox"/> Q21.2	<input type="checkbox"/> Q21.3	<input type="checkbox"/> Q21.4
Private Hire Vehicles	<input type="checkbox"/> Q21.5	<input type="checkbox"/> Q21.6	<input type="checkbox"/> Q21.7	<input type="checkbox"/> 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	<input type="checkbox"/> Q22.1	Agree	<input type="checkbox"/> Q22.2	Neither	<input type="checkbox"/> Q22.3
Disagree	<input type="checkbox"/> Q22.4	Strongly Disagree	<input type="checkbox"/> Q22.5	Don't Know	<input type="checkbox"/> 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	<input type="checkbox"/> Q23.1	Increased	<input type="checkbox"/> Q23.2	Removed	<input type="checkbox"/> Q23.3
				No opinion	<input type="checkbox"/> Q23.4

24a. What is your view on the number of taxi ranks in Cardiff?

(Please tick one box only)

Too many	<input type="checkbox"/> Q24.1	About right	<input type="checkbox"/> Q24.2	Not enough	<input type="checkbox"/> Q24.3
				No opinion	<input type="checkbox"/> 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	<input type="checkbox"/> Q25.1	About right	<input type="checkbox"/> Q25.2	Not enough	<input type="checkbox"/> Q25.3
				No opinion	<input type="checkbox"/> 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?
(Percentage)

 Q5.1

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

 Q6.1

- 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)?
(Please tick one box only)

Yes Q8.1

No Q8.2

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	<input type="checkbox"/> Q9.1	<input type="checkbox"/> Q9.2	<input type="checkbox"/> Q9.3	<input type="checkbox"/> Q9.4
Private Hire Vehicles	<input type="checkbox"/> Q9.5	<input type="checkbox"/> Q9.6	<input type="checkbox"/> Q9.7	<input type="checkbox"/> 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	<input type="checkbox"/> Q10.1	Agree	<input type="checkbox"/> Q10.2	Neither	<input type="checkbox"/> Q10.3
Disagree	<input type="checkbox"/> Q10.4	Strongly Disagree	<input type="checkbox"/> Q10.5	Don't Know	<input type="checkbox"/> 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	<input type="checkbox"/> Q11.1	Increased	<input type="checkbox"/> Q11.2	Removed	<input type="checkbox"/> Q11.3
		No opinion	<input type="checkbox"/> Q11.4		

12a. What is your view on the number of taxi ranks in Cardiff?

(Please tick one box only)

Too many	<input type="checkbox"/> Q12.1	About right	<input type="checkbox"/> Q12.2	Not enough	<input type="checkbox"/> Q12.3
		No opinion	<input type="checkbox"/> 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	<input type="checkbox"/> Q13.1	About right	<input type="checkbox"/> Q13.2	Not enough	<input type="checkbox"/> Q13.3
		No opinion	<input type="checkbox"/> 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.