AECOM

Cardiff Taxi Licensing Study 2016

Part 4: Summary Report

Cardiff Council

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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

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

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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.