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AGENDA

Pwyllgor PWYLLGOR DIOGELU'R CYHOEDD

Dyddiad ac amser y cyfarfod DYDD MAWRTH, 3 RHAGFYR 2019, 10.30 AM

Lleoliad YSTAFELL BWYLLGORA 1 - NEUADD Y SIR

Aelodaeth Cynghorydd Mackie (Cadeirydd)
Cynghorwyr Sattar, Asghar Ali, Derbyshire, Goddard, Jacobsen, Lancaster, Robson a/ac Wood

1 Ymddiheuriadau am Absenoldeb

Derbyn ymddiheuriadau am absenoldeb.

2 Datgan Buddiannau

I'w gwneud ar ddechrau'r eitem agenda dan sylw, yn unol â Chod Ymddygiad yr Aelodau.

3 Cofnodion *(Tudalennau 3 - 6)*

Cymeradwyo cofnodion y cyfarfodydd blaenorol fel rhai cywir

4 Cyfyngiad Trwydded Cerbyd Hacni *(Tudalennau 7 - 194)*

5 Materion Brys (os o gwbl)

Davina Fiore
Cyfarwyddwr Llywodraethu a Gwasanaethau Cyfreithiol
Dyddiad: Dydd Mercher, 27 Tachwedd 2019
Cyswllt: Graham Porter, 02920 873401, g.porter@caerdydd.gov.uk

PUBLIC PROTECTION COMMITTEE

5 NOVEMBER 2019

Present: Councillor Mackie(Chairperson)
Councillors Asghar Ali, Derbyshire, Goddard, Jacobsen, Lancaster, Robson and Wood

7 : APOLOGIES FOR ABSENCE

No apologies for absence were received.

8 : DECLARATIONS OF INTEREST

No declarations of interest were received.

9 : MINUTES

The minutes of the meetings held on 3 September 2019 and 9 October 2019 were approved as a correct record and were signed by the Chairperson.

10 : PRESTIGE VEHICLE APPLICATION

The applicant did not attend the meeting.

11 : DETERMINING THE SUITABILITY OF APPLICANTS AND LICENSEES

The Committee received a report on proposed revised guidance for determining the suitability of applicants and licensees in the Hackney Carriage and Private Hire trades.

In April 2019 the Institute of Licensing published a document titled 'Guidance on Determining the Suitability of Applicants and Licensees in the Hackney Carriage and Private Hire Trades'. The guidance was published in conjunction with the Local Government Association, Lawyers in Local Government and the Association of Licensing and Enforcement Officers.

At a recent meeting of the Wales Licensing Expert Panel the document was endorsed and it was recommended that all Welsh Local Authorities approve and implement the guidance to replace their existing policies. A number of authorities have adopted the guidance and others are in the process of doing so.

Members were advised that the authority has a policy to provide guidance on the treatment of convictions, cautions and criminal charges in respect of new applicants and existing drivers and operators. The current policy has been in place since 2015. The Committee at its meeting on 9 April 2019 resolved to consult with the local taxi trade on the proposed guidance on determining the suitability of applicants and licensees. A copy of the proposed guidance was appended to the report.

Members were advised that two responses were received during the consultation period. Both responses were summarised in the report. Response 1 was from a

driver who considered the proposed motoring offences suggestions to be unreasonable. Response 2 was from the Cardiff Hackney Alliance who called for a full Equalities Impact Assessment (EIA) to be undertaken and the findings discussed before proceeding with the implementation. A copy of the EIA was appended to the report at Appendix D.

The Committee received representations from Alan McCarthy representing Unite. Mr McCarthy raised concerns that the proposed guidance was likely to have a detrimental effect on BAME communities. Concerns were also raised that, should the revised guidance be adopted, new applicants would 'shop around' in neighbouring authorities for those which apply lower standards. The authority will effectively lose the control of the enforcement of those drivers and vehicles when they are operating in the City as they will be licenced by other authorities.

Mr McCarthy requested the Committee to consider postponing the implementation of the new guidance until neighbouring local authorities have implemented it, or to consult with and agree a future date upon which all authorities could implement the guidance.

Delaying would not only address the issue of 'cross-bordering', it would also offer an opportunity to analyse whether or not BAME applicants are adversely effected. Members were asked to note that other local authorities do not have the same level of BAME representation as Cardiff.

Officers advised that the Law Commission and Welsh Government have consulted on proposals to introduce national standards. However, some uncertainty remains and no indication has been given regarding timescales.

Members considered that if an application is received the authority will consider whether the applicant is a fit and proper person. Policy Guidance will remain in place and each case will be considered on its merits. A Member stated that until a White Paper on National Standards is published Cardiff should be leading the way. The revised guidance offers improved and strengthened policy guidance. Other authorities will follow suit.

The Committee also considered the merits of delaying the implementation until a future date mutually agreed with neighbouring authorities.

RESOLVED – That the policy guidance document 'Guidance on Determining the Suitability of Applicants and Licensees in the Hackney Carriage and Private Hire Trades' appended to the report at Appendix A be approved and implemented with effect from 6 November 2019.

12 : URGENT ITEMS (IF ANY)

No urgent items were received.

The meeting terminated at 11.00 am

COMMITTEENAME

MEETINGDATE

Present: County Councillor ChairPresentShortList(Chairperson)
County Councillors MembersPresentShortList

The meeting terminated at MeetingActualFinishTime

Mae'r dudalen hon yn wag yn fwriadol

CARDIFF COUNCIL **Agenda No.**
CYNGOR CAERDYDD

PUBLIC PROTECTION COMMITTEE: 3 December 2019

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. A Licensing 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 2016 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 946 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 were commissioned by Cardiff Council to undertake an independent survey of Cardiff's taxi demand in the summer of 2019. The full report is detailed in Appendices A - D.

1.5 The overall recommendation of the AECOM report is that Cardiff Council should maintain the current moratorium on the issue of new licences in Cardiff, except where there is need in the future for additional licences in the event that section 161 of the Equality Act 2010 is brought into force.

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 paragraph 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 12 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 to June 2019, and a total of 966 hours of observations were carried out. Details of the survey's area and method used is detailed in AECOM's 'Taxi Rank Operations and Public Attitude Survey' in Appendix A

3.2 The survey shows that that taxi supply always exceeds the taxi demand for all days.

3.3 The average passenger delay calculated across all ranks was 2 seconds. Apart from Saunders Road rank next to the railway station which saw an average wait time of 8.5 seconds, all other ranks have average passenger delays of less than 1 second.

3.4 The average delay for hackney carriages was high; especially when compared to the passenger delay. All average delays are below 15 minutes, but notably long delays take place at the Sophia Gardens Coach Station during the weekdays of 17.9 minutes, and on the Sunday at Heath Hospital and St Mary Street / Guildhall Place with daily averages of 16.9 and 16.1 minutes respectively.

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 show frequency of licensed vehicle use, passenger delays, passenger satisfaction with the service they received and general attitudes to the use of both taxis and private hire vehicles in Cardiff.

4.2 42% of respondents incorrectly believed that all licensed vehicles can use ranks or pick up from the roadside, compared to 39% that correctly responded that only a taxi can, suggesting that the general public has an overall lack of awareness of the difference between taxis and PHVs. In light of this lack of awareness, the Licensing Department intends to work with other stakeholders to educate the public around the differences between hackney carriage and private hire vehicles and the rules surrounding each type.

4.3 49% of respondents had taken a journey in a licensed vehicle in the last month, of those 26% were in a hackney carriage and 40% were in a private hire vehicle, 34% did not know which type of vehicle that had taken.

4.4 Of those that used licensed vehicles, 37% telephoned to make the booking, followed by 25% that used an online app, 23% used a rank and 14% hailed a taxi from the roadside.

4.5 Respondents were asked what they thought a daytime three-mile journey would cost. Of those that responded, all those that did estimated that it would cost below £10. Around one in five respondents thought that the cost of the journey would be below £5 whilst around a third estimated that it would cost between £5 and £9.

4.6 The public were asked if they felt there was sufficient availability of hackney carriages in Cardiff. 34% of respondents stated that there are sufficient numbers and 48% saying they didn't know, only 9% said there were an insufficient numbers of taxis.

4.7 The public were asked about the suitability of taxi ranks across the city. Approximately 10 percent of the suggestions state that there needs to be more ranks in the city centre; some sites were further specified such as Motorpoint Arena, Principality Stadium, Westgate Street, Greyfriars Road, and Churchill Way. Around 5% of the suggestions indicate that more ranks are wanted in the Cardiff Bay area. Another 5% of suggestions voiced a need for more ranks in the more suburban areas of Cardiff and in areas that are not in the city centre. Approximately 2.5% of the suggestions placed the hospital as a location that requires more taxi ranks.

4.8 The Taxi Rank Operations and Public Attitude Survey is detailed at Appendix A.

5. Driver & Proprietor Attitude Survey

5.1 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.

5.2 The survey shows that the average number of hours worked per week by hackney carriage drivers is around 45 hours, compared with around 43 hours by private hire drivers. The majority of these hours worked by hackney carriage drivers is during the night-time on the weekend and for private hire drivers is during the daytime on weekdays.

5.3 Hackney carriage and private hire vehicle drivers were asked about the emissions produced by their vehicle. 31% of hackney carriage and 44% of private hire vehicle drivers stated that their vehicle was a low emissions vehicle. This is considerably lower than the results in the 2016, for example a drop in low emission hackney carriages by 20%. This may be due to the driver being unaware of what constitutes a low emission vehicle.

5.4 Half of hackney carriage respondents stated that their vehicle was wheelchair accessible, whereas only 3% of private hire respondents stated that their vehicle was wheelchair accessible. Despite this, the number of disabled passengers carried by private hire vehicles is relatively high.

5.5 The last question of the driver's survey asked whether drivers had been attacked in the last 12 months, whether physically or verbally. 68% of hackney carriage drivers had been verbally attacked and 15% stated that they have been physically attacked. This compares to 41% of private hire drivers being verbally attacked and 3% being physically attacked.

5.6 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.

5.7 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/Duke Street/Kingsway, Wood Street, Westgate Street, and to increase rank space at the railway station.

5.8 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.

5.9 The drivers and proprietors surveys ended with an open ended improvements/comments section. By far the most popular response given by both drivers and proprietors was related to cross-border hire with many respondents stating that stricter regulations should be put in place to assess driver capabilities and some drivers went further by suggesting it should be reduced or stopped. It should be noted that restricting cross-border hire would require a change to national legislation.

5.10 The Driver and Proprietor Attitude Survey Report is detailed in Appendix B.

6. Operator and Stakeholder Attitude Survey

6.1 The Stakeholder Attitude Survey was conducted online with 16 stakeholders including 2 private hire operators: local interest groups, hoteliers, transport operators and a visitor attraction.

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

6.3 The Operator and Stakeholder Attitude Survey is detailed in Appendix C.

7. Comparison with 2016 Study.

7.1 The 2016 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 One of the major changes since 2016 is the rise of app based taxi and private hire operators.

7.3 The most significant change between 2016 and 2019 is the reduction in activity on the weekends in the late evening and early morning; the greatest reduction occurs around midnight where the effective taxi demand and the passenger demand reduces by 50%. The reduction in passenger demand during this period is around 30%, effective taxi demand and supply has reduced by 40%. The conditions for the Weekday and Sunday have remained relatively consistent; one deviation is between 08:00 and 10:00 where both passenger and taxis demand reduces by 50%.

7.4 The overall passenger waiting time for a taxi has marginally decreased from 0.9 seconds in 2016 to 0.8 seconds in 2019. However, it should be noted that this includes the Saunders Road rank where isolated incidents of unmet demand occur and were not representative of the rank as a whole. This indicates that the current moratorium on the issue of new licences has not had a detrimental impact on passenger delay.

7.5 On Friday nights and Saturdays the time at which the level of supply and demand operates at equilibrium has decreased slightly, and on weekdays and Sundays has increased by approximately 1%. The proportion of time where there is unmet demand has slightly decreased on weekdays and weekends and a slight increase on Sundays. The proportion of time where there is unused supply has increased by around 5% on both weekends and Sundays, whilst on weekdays it has increased by approximately 8%. Overall the assessment showed that the market conditions have remained largely unchanged since 2016, suggesting that the moratorium on the issue of new taxi licences has not disadvantaged passengers.

7.6 The public were asked to give the reasons why they did not use licensed vehicles more often in 2016 and 2019. Availability was listed by 1.2% in 2016 and wasn't cited at all in 2019. These results indicate that there has been very little change in public perception on availability, particularly with the drop in reasons for why licensed vehicles are not used more often. Respondents were asked directly whether they felt that there are enough taxis in Cardiff, with 9.0% reporting insufficient numbers in 2019 compared with the 7.8% in 2016, suggesting little change over the last 3 years and no emerging problem.

8. Consultation

8.1 The trade consultation procedure was undertaken in accordance with the consultation procedure on any policy matters.

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 It is the view of the Competition and Markets Authority (CMA) that quantity restrictions may cause harm to passengers through reduced availability,

increased waiting times, reduced scope for downward competitive pressure on fares and reduced choice. They also may increase the risk to passenger safety if they encourage the use of illegal, unlicensed drivers and vehicles.

11. Financial Implications.

11.1 As limitation has been in place since 2010 (reviewed in 2013 and 2016), to retain the current moratorium on hackney carriage proprietor licences would not result in a change in income.

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.

12.2 As the AECOM report highlighted a general lack of awareness from the public regarding hackney carriage and private hire vehicles, Members may want to note that the Licensing Department will work with a number of stakeholders running an education and awareness campaign to help improve understanding amongst the public.

Dave Holland **29 October 2019**
HEAD OF SHARED REGULATORY SERVICES

This report has been prepared in accordance with procedures approved by Corporate Managers.

Background Papers:
DfT - Taxi and private hire vehicle licensing: best practice guidance (2010)
Competition and Markets Authority - Regulation of taxis and private hire vehicles: understanding the impact on competition (2017)

Mae'r dudalen hon yn wag yn fwriadol

AECOM Imagine it. Delivered.

Cardiff Taxi Licensing Study 2019

Part 1: Taxi Rank Operations and Public Attitude Survey

Cardiff Council

30 September 2019

Prepared by: James Bracey..... Checked by: Ellena Caudwell.....

Verified by: James Gait ..... Approved by: James Gait.....

Cardiff Taxi Licensing Study 2019: Part 1: Taxi rank Operations and Public Attitude Survey

Rev No	Comments	Checked by	Approved by	Date
1	Draft V1	EC	JG	06/09/2019
2	Final Issued V2	EC	JG	27/09/2019

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Job No 60600820 Cardiff Taxi Study 2019 Date Created September 2019

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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 studies that took place in 2013 and 2016.

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 2019: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2019: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2019: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2019: 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 show excess taxi supply across the city in all time periods, when compared to the effective taxi demand from passengers. The supply and demand profiles follow very similar patterns across each day type. The average delay time for passengers has remained similar to the 2016 study; 0.8 seconds in 2019 compared to 0.9 in 2016. The average taxi delay has increased slightly to 8.9 minutes, compared to 8.4 minutes in 2016.

E.3 There were rare occasions of unmet demand, with Saunders Road the only rank showing unmet demand lasting longer than 10 minutes. Further analysis of the data showed the rank size is a possible contribution to this delay, as large numbers of passengers arrive at once from the train station whilst there is a continual supply of taxis. This is supported by the public attitude survey which cited this location as in need of improved taxi ranks. There was no evidence of insufficient taxis from the public attitude survey, and a lack of taxis was not cited as a reason to not travel by licensed vehicle by any respondent.

E.4 The Taxi Market Condition Assessment Matrix applied to both 2016 and 2019 shows little difference in market conditions. The evidence suggests that the continuation of the moratorium on the issue of new taxi licences has not disadvantaged passengers.

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 review studies that took place in 2013 and 2016.

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 2019: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2019: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2019: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2019: 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 2016 study results with the new 2019 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 via a licensed private hire operator. 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 937 taxis with a further 63 licences currently on hold, with a further 4 suspended. Given that the population of Cardiff is 362,756 (2017 mid-year estimate), this equates to one taxi per 369 people; a slight increase compared with 2010 when the moratorium was originally introduced. In addition, there are currently 1294 licensed private hire vehicles, which is a 23% increase from the 2016 study. The total number of licensed drivers has increased from 2045 to 2319.

Table 2.1
Comparison of Licence Numbers in 2010, 2013, 2016 and 2019

Licensed Vehicles/Drivers	2010	2013	2016	2019
Taxis	875	896	901	937
Private Hire Vehicles	865	827	1056	1294
Drivers	2045	2022	2148	2319

2.1.5 Table 2.2. compares the number of licensed taxis per head of population in a number of local authorities of comparable size to Cardiff.

Table 2.2
Comparison of Taxi Licences per Population

Location	Population Estimate (2017 mid-year estimate)	Taxi Licence Numbers	Number of People per Taxi Licence
Nottingham	331,100	411	806
Leicester	353,540	329	1075
Cardiff	362,756	937	369
City of Bristol	459,252	639	719

2.1.6 Taxis operate from 12 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**.

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

2.1.7 It is worth noting the closure of the Tredegar Street Taxi rank since the 2016 survey.

Table 2.3
Location and Hours of Operation of Official Taxi Ranks

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

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

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 Greyfriars Road, St Mary Street (outside O'Neill's and Walkabout) 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) St Mary Street (outside Walkabout)	Informal
(B) Greyfriars Road (Unofficial)	Informal
(C) Sophia Gardens	Coach stop – 24 hrs
(D) St Mary Street (outside O'Neill's)	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	£2.50
If distance exceeds 103 yards (94.18m) for first 103 yards (94.18m)	£2.50
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 six key pieces of legislation;

- The Town Police Clauses Act 1847;
- The Town Police Clauses Act 1889;
- The Transport Act 1985;
- The Local Government (Miscellaneous Provisions) Act 1976;
- The Equality Act 2010; and
- The Wales Act 2017.

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. The Wales Act 2017 reassigns the control of this legislation to the National Assembly of Wales as part of the devolved settlement for Wales.

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.

2.4 Additional Context

2.4.1 Following The Wales Act 2017, which saw devolution of taxi legislation to the National Assembly of Wales, Welsh Government launched a consultation on a White Paper for taxi and private hire licensing law reform in Wales, in December 2018. The White Paper seeks to provide unity across Wales for taxis and private hire vehicles, introducing national standards, enforcement powers, local authority information sharing for safeguarding, and introducing a Joint Transport Authority to oversee licensing functions.

2.4.2 The consultation closed in March 2019, and a Summary of Response was issued in July 2019. There was overall support for the proposals, although proposals for a Joint Transport Authority saw little support. The responses will be used to help with future proposals; legislation is unchanged at the time of this study.

2.4.3 Since the 2016 study, there are additional private hire operators that utilise booking apps operating in the city.

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. Subsequent studies in 2013 and 2016 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 2016 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 to June 2019. A total of 966 hours of observations were undertaken across 12 official and 5 unofficial ranks during this time period.

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.

3.2.3 A number of ranks do not have a full 72 hours surveyed; 24 hours for each of the three day types. Heath Hospital is not a 24 hour rank and therefore is not surveyed for the full day; only its hours of operation. Lower St Mary Street (East) was combined with Lower St Mary Street (West) during the weekend survey period due to taxis switching between ranks. The Walkabout, O'Neill's, and Greyfriars Road unofficial ranks are only surveyed on the late Friday night / early Saturday morning to coincide with peak demand at these locations.

Table 3.1
Allocation of Taxi Rank Observations

Location	Hours Observed
Albert Street	72
Churchill Way	72
Greyfriars Road	72
Havelock Street	72
Heath Hospital	45.7
Lower St Mary Street (East)	48[2]
Lower St Mary Street (West)	72[1]
Mermaid Quay	72
Mill Lane	72
Park Place	72
Saunders Road (Cardiff Central Station)	72
St Mary Street / Guildhall Place	72
Sophia Gardens*	72
St Mary Street (outside O'Neill's)*	4.8
St Mary Street (outside Walkabout)*	4.8
Wood Street / Westgate Street*	72
Greyfriars (Unofficial)*	4.9

* Unofficial taxi ranks

[1] Time inclusive of road closure on Friday and Saturday (weekend) nights – 22:40 – 03:50

[2] Activity on Lower St Mary Street East and West were recorded together during the weekend

3.3 Public Attitude Survey

3.3.1 A survey of 491 people was conducted across May and June 2019. 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 and 2016 studies as it recognised that the users of licensed vehicles in Cardiff include other groups as well as 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 12 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.

[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	3	5	7	3	6	3	5	7
Churchill way	3	6	3	5	7	3	6	3	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	3	5	7	3	6	3	5	7
Heath Hospital	3	6	3	2	0.3	1.5	6	3	2	0	1.58	6	3	1.5	0
Lower St Mary Street (East)	3	6	3	5	7	0	0	0	0	0	3	6	3	5	7
Lower St Mary Street (West)	3	6	3	5	7	3	6	3	5	7	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	3	5	7	3	6	3	5	7
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
Duke Street/ Castle Street	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Greyfriars Road (Unofficial)	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Sophia Gardens	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Wood Street	3	6	3	5	7	3	6	3	5	7	3	6	3	5	7
Walkabout	0	0	0	0	0	0	0	0	1.33	3.5	0	0	0	0	0
O'Neill's	0	0	0	0	0	0	0	0	1.33	3.5	0	0	0	0	0
Greyfriars (Unofficial)	0	0	0	0	0	0	0	0	1.42	3.5	0	0	0	0	0

Grey squares indicate periods when checks were carried out, but no activity was observed.

4.1.5 Table 4.3 shows an almost complete coverage across the survey periods for weekday, weekend, and Sunday readings. The Heath Hospital rank does not operate for 24hrs like the rest of the official ranks and hence have not been surveyed outside of their operating periods. Unofficial ranks have limited coverage because they are not in use for long periods of time and therefore no observations have been carried out during these times.

4.2 Survey Methodology

4.2.1 As in 2016, 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	

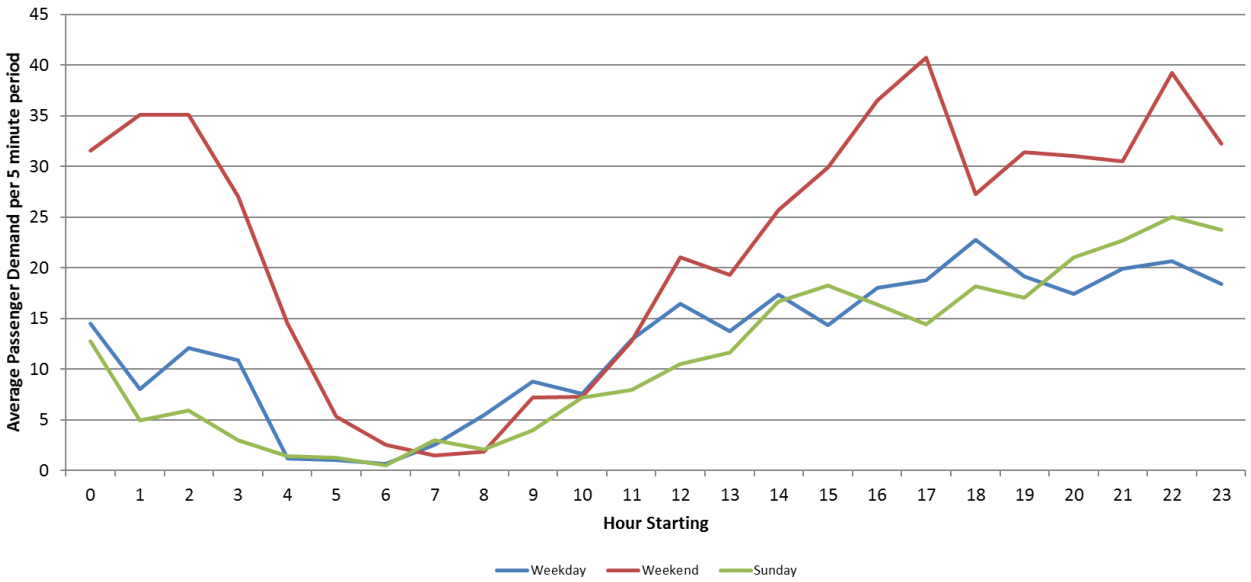
4.2.5 The passenger indicated in red arrives at some point in time period T and is at the back of the queue (6th) at the end of that period. During the following 5-minute period, T+1, 3 passengers depart leaving the red passenger 3rd in the queue, while 1 person has joined behind. In the next time period, 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 passengers' 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, the passenger demand is peaked, particularly on weekends. The peaks occur in the early evening, late night, and early morning when other transport choices are limited or in high demand.

4.3.3 On weekdays, passenger demand builds from around 7am, eventually plateauing at 11am, where demand fluctuates between 14-18 passengers every 5 minutes across all ranks until 4pm. Demand peaks at around 6pm at around 23 every five minutes across all ranks. Demand reduces and plateaus again between 18 and 21 passengers from 7pm to midnight. The profile then shows that demand generally declines, with a trough at 1am of 8 passengers per 5 minutes, followed by a pickup between 2am and 3am, before dropping towards 0 passengers. The rank that shows the greatest amount of passenger demand throughout the day is Saunders Road which peaks at 6pm with 10 passengers every 5 minutes; it also has a number of smaller peaks throughout the day. This is largely as a result to Saunders Road's close proximity to Cardiff Central rail station and the peaks likely reflect multiple trains dropping off passengers simultaneously. Another notable rank for passenger demand is Lower St Mary Street (West) which sees increased passenger demand in the late evening and early morning; peaking at 2am at about 6 passengers per 5-minute period. This is likely as a result of this rank being positioned by a number of public houses including the Prince of Wales, Walkabout, and O'Neill's.

4.3.4 Weekend demand profile shows a similar trend but with increased volume. The passenger demand begins to build up 8am, peaking at 5pm where the demand is around 41 passengers per 5-minute period. It then sharply declines and plateaus at around 30 passengers per 5-minute period before peaking again at 10pm with 39. The third peak occurs at 1 and 2am when demand is 35 passengers per 5-minute period. The peaks are the notable differences between the weekend and weekday profiles; they are likely because of passengers going to and from public houses and at a time where public transport is not viable and personal circumstance prevents use of private vehicle usage. Similar to the weekday result, the Saunders Road rank has the highest demand between 7am and 7pm with peaks of around 11 passengers per 5-minute period at 12pm, 2pm, and 5pm, which is likely due to the proximity to Cardiff Central Station. The rank with the largest demand between 7pm and 7am is St Mary Street / Guildhall Place with a peak demand at 11pm and midnight of about 12 passengers per 5-minute period. There is a plateau of 10 passengers per 5-minute period between 1am and 3am, this profile follows the behaviour of evening passengers patronising the drinking and eating establishments within the city centre.

4.3.5 The Sunday profile is very similar to the weekday profile. The most notable difference is the absence of a peak in passenger demand in the early morning; most likely from a lack of evening socializing. As with the other day profiles, Saunders Road experiences the greatest demand of all the official ranks with a peak at 11pm of approximately 14 passengers per 5-minute period; it also plateaus between 2pm and 4 pm at around 5 passengers.

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, period and location.

4.4.2 The overall taxi occupancy over all locations is 1.8 passengers per taxi. There is limited variation by day type. Weekdays have the lowest average occupancy of 1.6, followed by Sundays with 1.8 passengers per taxi, and weekends having the highest average occupancy of 2.0 passengers per taxi.

4.4.3 On weekdays, taxi occupancy is higher in the off-peak morning period than during the daytime, perhaps reflecting that a higher proportion of taxi journeys made are leisure related, with people travelling in larger groups to and from their destinations, while daytime trips would be largely business related and hence would have more people travelling on their own or in small groups.

4.4.4 At weekends, there is a noticeable increase in average taxi occupancy in the OPM period where there is an average of 2.3 people. The reason can be attributed to passengers using the taxis to get to and from leisure establishments, travelling as a group. This is largely concentrated around Lower St Mary Street, Mermaid Quay, Mill Lane, Park Place, and the unofficial ranks. This also can be explained by passengers travelling in groups for leisure purposes given how close three of these ranks are to the pubs and nightclubs around the west side of the city centre city centre. All of these ranks have an occupancy higher than 2 passengers.

4.4.5 There is less variation across the day on Sundays compared to the weekday and weekend; average occupancy stays between 1.6 and 1.8 passengers. The average occupancy across all time periods and ranks is higher than the weekday but lower than the weekend; this can be attributed to a reduction of business related trips and visitors using the taxi services to get to and from the retail centres. This is further evidenced by the fact that the average peak rank occupancy for a number of the ranks occurs in the interpeak period, when said retail centres will be open.

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	1.4	1.3	1.0	**1.3**	1.2	1.4	1.3	1.3	-	**1.3**	-	1.3	1.9	1.2	-	**1.4**	**1.3**
Churchill way	1.3	1.4	1.1	1.5	1.6	**1.4**	1.7	1.3	1.5	1.8	2.3	**1.8**	1.5	1.6	1.9	1.5	1.7	**1.6**	**1.6**
Greyfriars Road	1.5	1.4	1.5	1.3	2.1	**1.6**	1.4	1.9	2.2	2.0	2.2	**2.0**	1.0	1.7	1.5	1.9	1.9	**1.7**	**1.8**
Havelock Street	-	1.0	-	-	-	**1.0**	-	-	-	-	-	**-**	-	-	-	1.0	-	**1.0**	**1.0**
Heath Hospital	1.4	1.5	1.5	1.2	-	**1.5**	1.5	1.2	1.4	1.0	-	**1.3**	1.0	1.5	1.5	1.8	-	**1.5**	**1.4**
Lower St Mary Street (East)	-	-	-	-	1.9	**1.9**	-	-	-	-	-	**-**	1.6	2.5	2.0	3.0	2.5	**2.2**	**2.2**
Lower St Mary Street (West)	3.0	1.3	1.3	2.3	2.4	**2.2**	2.0	2.5	2.6	2.6	2.5	**2.6**	1.6	2.5	2.0	1.8	1.8	**2.0**	**2.2**
Mermaid Quay	1.4	1.4	1.4	1.9	2.5	**1.7**	1.0	2.4	2.5	1.9	2.2	**2.1**	1.5	1.8	1.7	2.1	2.3	**1.9**	**1.9**
Mill Lane (South)	1.3	1.7	1.8	1.6	1.4	**1.6**	-	2.1	2.2	1.8	2.3	**2.1**	2.0	2.1	1.2	1.5	1.4	**1.8**	**1.9**
Park Place	2.0	1.3	1.3	1.5	1.4	**1.4**	1.3	1.5	1.5	2.4	2.5	**2.0**	1.7	1.6	1.4	1.5	2.0	**1.5**	**1.7**
Saunders Road	1.1	1.5	1.6	2.0	1.6	**1.6**	1.3	2.0	2.1	2.1	1.9	**1.9**	1.3	1.6	1.6	2.0	1.8	**1.7**	**1.7**
St Mary Street/Guildhall Place	1.1	1.4	1.4	1.6	1.9	**1.5**	1.1	1.5	2.1	1.6	1.9	**1.8**	1.3	1.6	1.8	1.9	1.8	**1.8**	**1.7**
Sophia Gardens	-	1.6	2.0	1.3	2.0	**1.7**	-	2.0	1.5	1.9	2.0	**1.9**	-	1.6	1.6	1.5	1.2	**1.5**	**1.7**
Wood Street	-	1.3	1.3	1.5	1.6	**1.5**	1.5	1.7	1.7	1.9	1.6	**1.7**	2.0	1.3	1.8	1.9	1.8	**1.8**	**1.7**
Greyfriars Road (Unofficial)	-	-	-	-	-	**-**	-	-	-	1.8	2.6	**2.5**	-	-	-	-	-	**-**	**2.5**
St Mary Street (Walkabout)	-	-	-	-	-	**-**	-	-	-	2.2	2.4	**2.4**	-	-	-	-	-	**-**	**2.4**
St Mary Street (O'Neill's)	-	-	-	-	-	**-**	-	-	-	2.6	3.0	**2.9**	-	-	-	-	-	**-**	**2.9**
Grand Total	**1.3**	**1.4**	**1.4**	**1.7**	**1.9**	**1.6**	**1.3**	**1.7**	**1.9**	**2.0**	**2.3**	**2.0**	**1.6**	**1.8**	**1.7**	**1.8**	**1.8**	**1.8**	**1.8**

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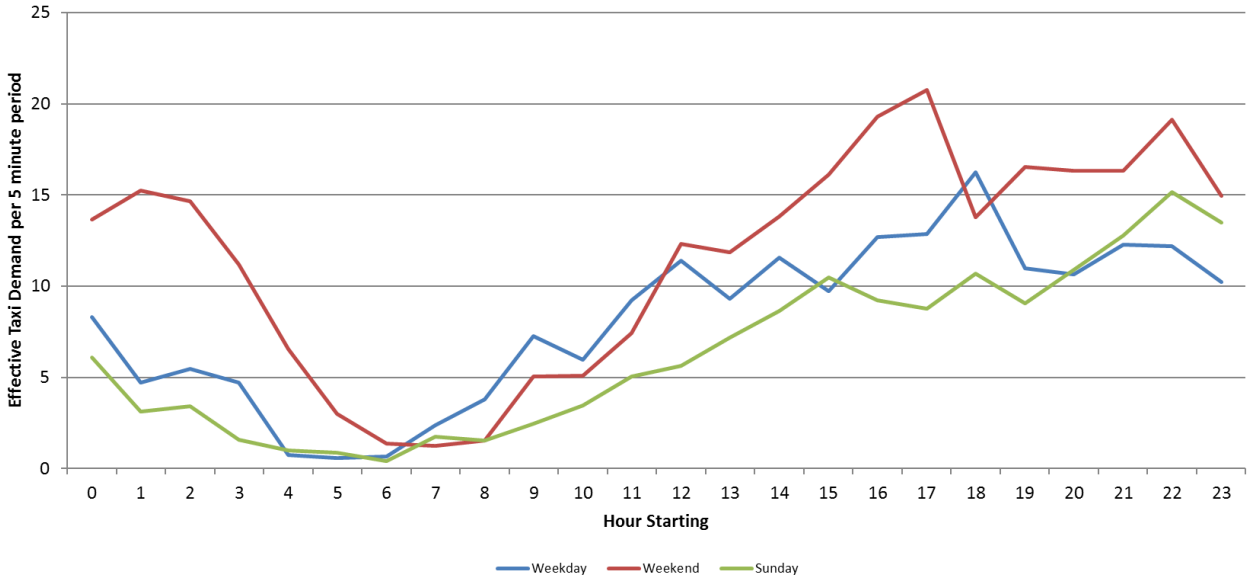
4.5 Effective Taxi Demand

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)

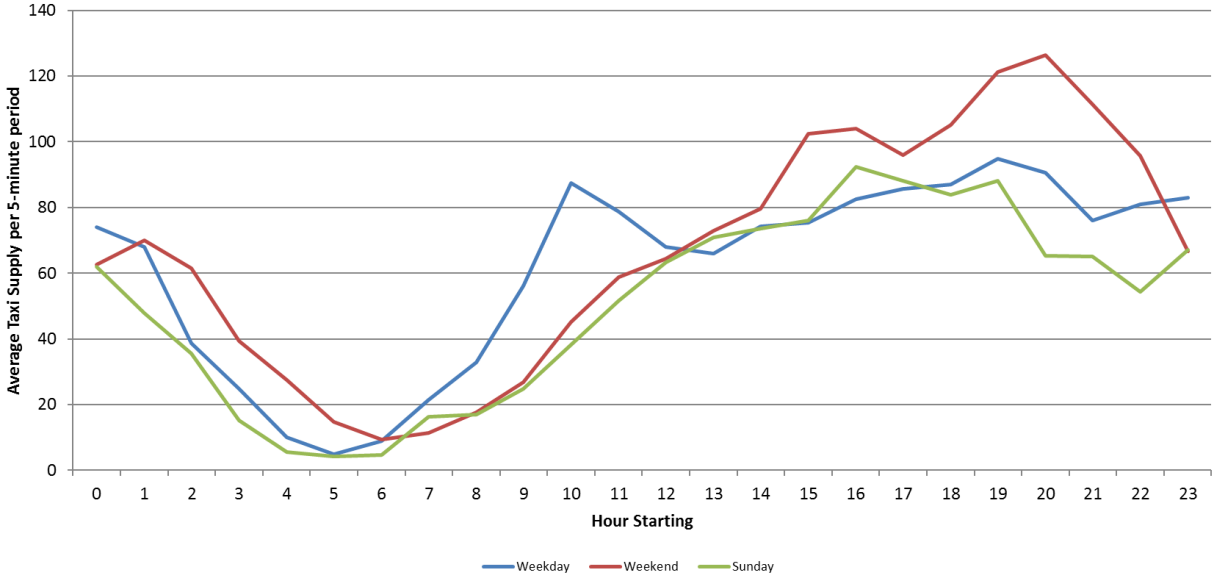


4.5.2 When comparing Figure 4.3 with 4.2 it evident that they share a similar profile; showing that the fluctuations in passenger demand across the day match those of the effective taxi demand. The effective taxi demand is approximately half that of the passenger demand; this is to be expected given that the average occupancy is approximately 1.8 passengers. One thing that should be noted is that the difference between the weekend and weekday profiles in Figure 4.3 is not as great as in Figure 4.2. This is as a result of the passenger occupancy on the weekend being typically higher than the 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)



4.7 Comparison of Taxi Demand and Supply

4.7.1 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.

4.7.2 It should be noted that taxi supply always exceeds the taxi demand for all days.

4.7.3

Figure 4.5
Comparison of Demand and Supply: Weekday

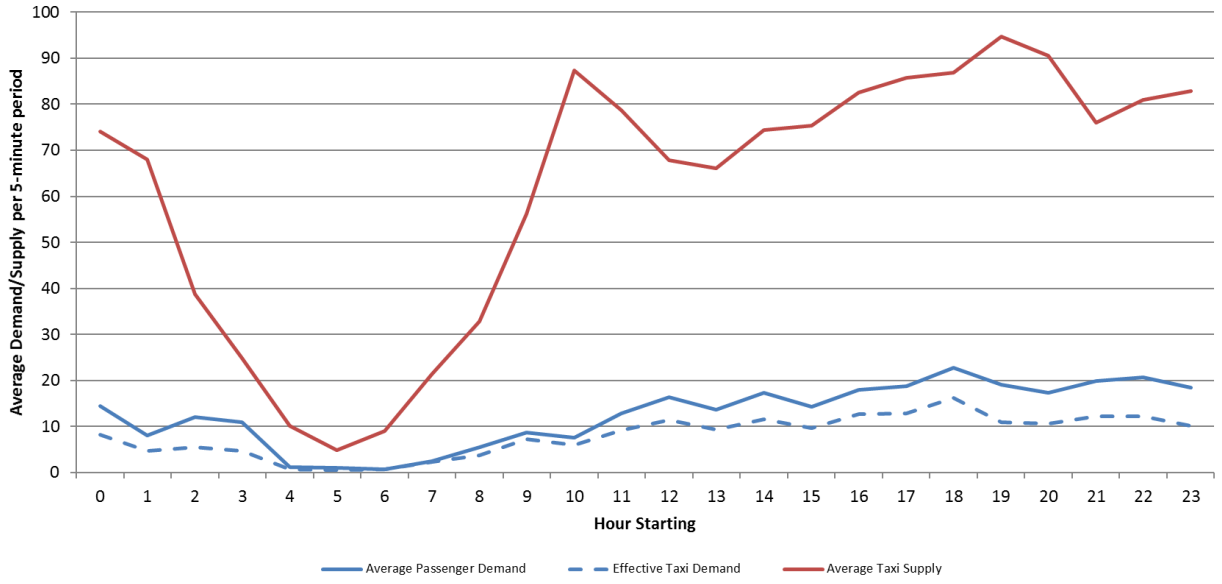


Figure 4.6
Comparison of Demand and Supply: Weekend

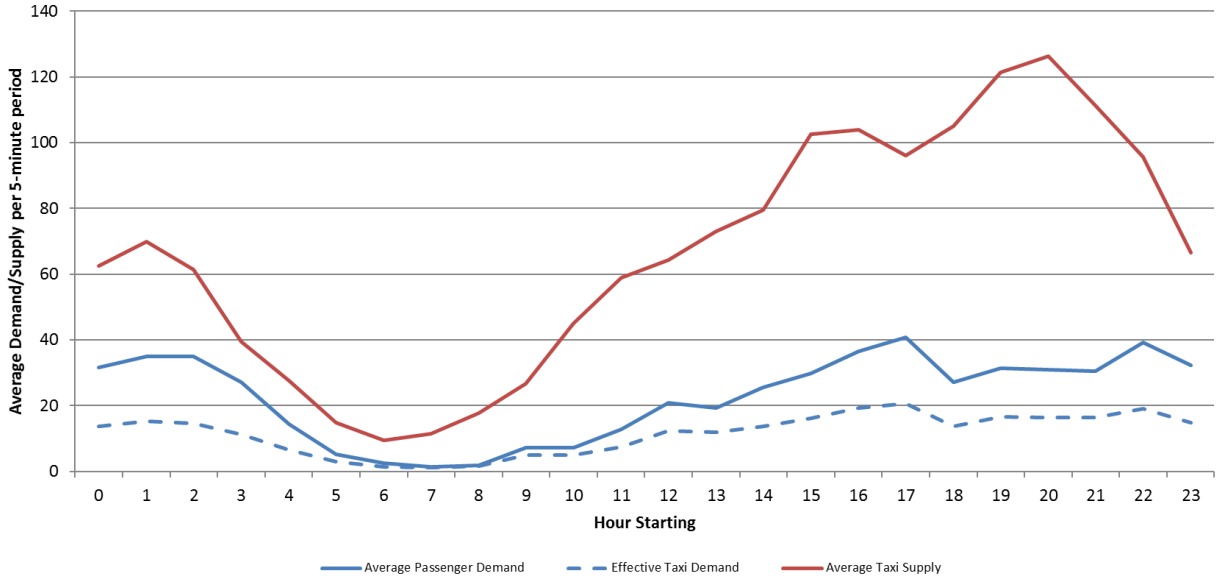
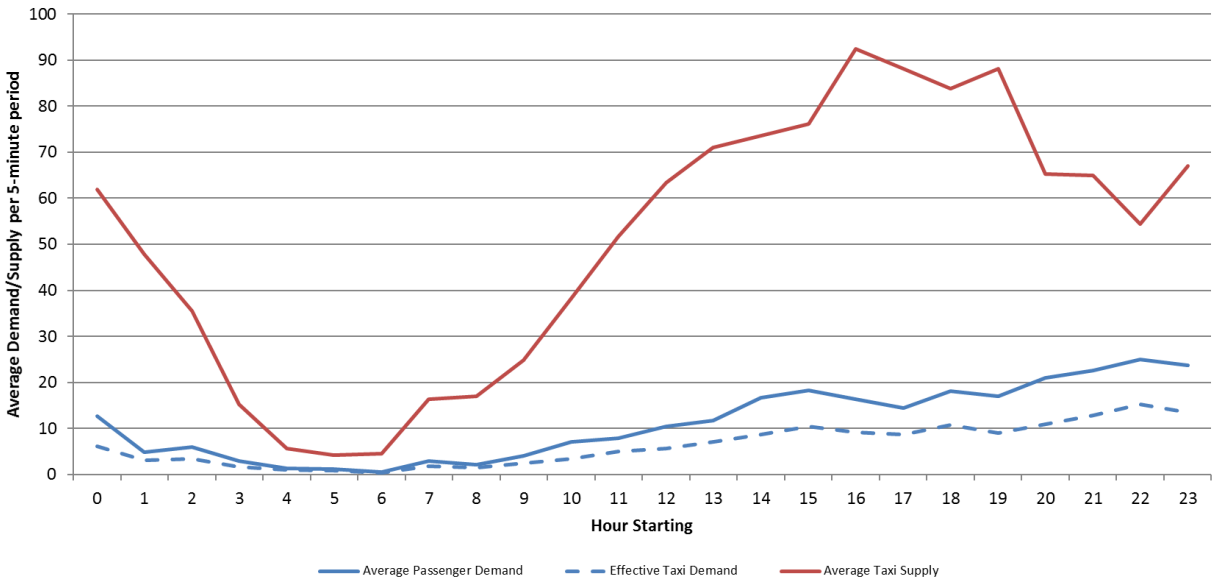


Figure 4.7
Comparison of Demand and Supply: Sunday



4.8 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 2016 and 2019 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 the dataset it is evident that the average delay time for passengers is around 2 seconds; indicating that a taxi is usually available immediately in most locations. The location with the longest average delay is Saunders Road with an average delay of 8.5 seconds. Saunders Road is located next to the rail station and is subjected to high fluctuations in passenger demand which coincides with train arrivals. The delay in the dataset is likely because of a large number of train passengers arriving at the rank at the same time, emptying the rank of its taxis, resulting in a delay before more taxis arrive to refill it. The longest delay is experienced on Sunday when passengers were waiting for 24 seconds on average; largely because of an average waiting time of 111 seconds at during the OPN period.

4.8.4 Considering all ranks other than Saunders Road; there is very little delay at all. All other ranks have average passenger delays of less than 1 second. The reason for this low waiting time is likely due to a considerably larger taxi supply than effective taxi demand; the profiles of Figures 4.5-4.7 support this. Generally, the taxi supply for all ranks by far exceeds their demand; there are exceptions to this where the taxi supply of certain ranks will drop to zero during quiet periods but will pick up again before demand starts to build.

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 period (AM peak, interpeak, PM peak and off-peak). Table 4.6 shows the average waiting time for taxis.

4.8.6 The analysis indicates that the average taxi delay is high; especially when compared to the passenger delay. All average delays are below 15 minutes, but notably long delays take place at the Sophia Gardens Coach Station during the weekday of 17.9 minutes, and on the Sunday at Heath Hospital and St Mary Street / Guildhall Place with daily averages of 16.9 and 16.1 minutes respectively.

4.8.7 Overall average taxi delays are highest on the Sunday day type, with shortest delays on the weekend. The longest delays on weekdays and Sundays are during the interpeak period, whereas on weekends the longest delays are during the PM peak.

4.8.8 The longest delays occur on the St Mary Street / Guildhall Place rank on Sunday during the interpeak period where taxi delays almost average half an hour. This is closely followed by Sophia Gardens during the weekday off-peak morning period.

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	2.5	0.0	0.0	0.0	**0.6**	**0.2**
Churchill Way	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**
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**	9.2	0.0	0.0	0.0	0.0	**1.1**	**0.4**
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**	**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**
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	4.3	0.0	0.0	**0.5**	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.2**
Mill Lane (South)	0.0	1.6	0.0	0.0	0.0	**0.4**	0.0	0.0	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.1**
Park Place	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**
Saunders Road	0.0	0.0	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	6.3	2.0	**1.9**	0.0	0.0	0.0	111.3	1.7	**23.7**	**8.5**
St Mary Street/Guildhall Place	0.0	0.0	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	5.9	0.0	**1.2**	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.4**
Sophia Gardens	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	11.5	0.0	**2.4**	**0.8**
Wood 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**
Greyfriars Road (Unofficial)	-	-	-	-	-	**-**	-	-	-	0.0	0.0	**0.0**	-	-	-	-	-	**-**	**0.0**
St Mary Street (Walkabout)	-	-	-	-	-	**-**	-	-	-	0.0	0.0	**0.0**	-	-	-	-	-	**-**	**0.0**
St Mary Street (O'Neill's)	-	-	-	-	-	**-**	-	-	-	0.0	0.0	**0.0**	-	-	-	-	-	**-**	**0.0**
Grand Total	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.9**	**0.1**	**0.3**	**0.7**	**0.2**	**0.0**	**9.2**	**0.1**	**2.1**	**0.8**

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	8.7	8.1	5.2	8.5	0.8	**5.7**	3.6	6.2	15.3	9.6	0.0	**5.9**	4.5	8.6	8.8	6.9	0.0	**5.2**	**5.6**
Churchill Way	6.8	11.0	7.8	10.8	19.3	**12.5**	5.8	10.9	11.8	8.9	10.0	**9.7**	2.2	9.1	13.3	15.3	10.5	**10.5**	**10.9**
Greyfriars Road	4.0	13.8	14.7	12.2	11.2	**11.6**	5.9	11.8	8.4	10.4	3.8	**8.0**	3.2	12.5	13.6	11.7	16.5	**12.5**	**10.7**
Havelock Street	0.0	6.0	1.4	0.0	0.0	**1.7**	0.4	0.1	0.0	0.0	0.2	**0.1**	0.0	0.0	0.0	0.6	0.0	**0.1**	**0.6**
Heath Hospital	10.3	9.6	8.9	16.9	1.3	**10.4**	11.7	10.4	19.2	25.1	-	**15.0**	8.0	20.6	15.1	14.5	-	**16.9**	**13.9**
Lower St Mary Street (East)	0.0	0.0	0.0	0.0	2.8	**0.8**	-	-	-	-	-	**-**	9.2	9.9	10.2	3.4	0.5	**5.8**	**3.3**
Lower St Mary Street (West)	0.5	11.3	9.9	8.1	9.0	**8.4**	18.2	14.6	15.4	8.9	5.2	**11.2**	9.2	9.9	10.2	9.3	9.3	**9.5**	**9.7**
Mermaid Quay	3.4	11.3	7.8	10.3	3.5	**7.4**	4.6	8.5	6.8	5.4	4.1	**5.9**	5.4	11.2	8.4	12.1	2.6	**7.8**	**7.0**
Mill Lane (South)	14.1	14.4	13.9	13.9	10.5	**13.0**	18.9	11.2	6.8	10.6	3.4	**9.2**	15.4	11.7	10.9	12.9	10.4	**12.0**	**11.4**
Park Place	22.5	13.1	9.3	8.5	1.5	**9.4**	4.1	11.5	8.6	16.1	8.0	**10.2**	7.0	17.8	18.0	14.4	3.9	**11.7**	**10.4**
Saunders Road	8.6	13.8	9.7	12.2	9.3	**11.0**	9.8	7.5	9.2	17.9	7.4	**10.2**	10.0	9.8	15.0	9.5	10.1	**10.5**	**10.5**
St Mary Street/Guildhall Place	3.2	16.3	13.0	9.3	7.8	**10.3**	2.8	14.9	10.2	7.3	5.0	**8.3**	16.3	29.4	14.9	13.3	7.1	**16.1**	**11.6**
Sophia Gardens	2.8	23.1	7.2	12.8	28.3	**17.9**	0.0	13.6	26.8	13.4	8.4	**12.0**	0.0	9.7	9.1	6.9	18.2	**10.3**	**13.4**
Wood Street	0.0	2.1	11.3	12.4	11.4	**7.8**	0.4	4.4	11.2	6.5	3.2	**4.8**	0.5	6.6	11.3	10.6	12.5	**9.0**	**7.2**
Greyfriars Road (Unofficial)	-	-	-	-	-	**-**	-	-	-	5.8	4.7	**5.0**	-	-	-	-	-	**-**	**5.0**
St Mary Street (Walkabout)	-	-	-	-	-	**-**	-	-	-	1.5	1.5	**1.5**	-	-	-	-	-	**-**	**1.5**
St Mary Street (O'Neill's)	-	-	-	-	-	**-**	-	-	-	1.5	1.5	**1.5**	-	-	-	-	-	**-**	**1.5**
Grand Total	**6.1**	**11.0**	**8.6**	**9.4**	**8.9**	**9.1**	**6.4**	**9.7**	**11.5**	**9.7**	**4.6**	**8.0**	**6.4**	**11.9**	**11.3**	**9.9**	**7.8**	**9.6**	**8.9**

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 491 interviews were completed in total, not all the table totals add up to 491. This is due to not all questions requiring an answer, some respondents failed to answer some of the questions that were asked, and some questions require multiple responses. Where the latter case applies, this will be highlighted in the title of the table.

5.2 Survey Administration

Table 5.1
Survey Sample and 2011 Census by Age and Sex

Category	2011 Census	Actual Sample	
	Percent	Frequency	Percent
16 – 34	40.7%	180	36.7%
35 – 64	43.1%	242	49.3%
65+	16.3%	50	10.2%
No Answer	-	19	3.9%
Total	**100.0%**	**491**	**100.0%**
Male	48.8%	226	46.0%
Female	51.2%	248	50.5%
No Answer	-	17	3.5%
Total	**100.0%**	**491**	**100.0%**

5.2.1 Table 5.1 demonstrates that the age structure of the sample conforms relatively well to the 2011 Census, although the 16-34 and 65+ age groups have been marginally under-sampled. The mix of male and female respondents is broadly similar to the 2011 Census with the majority of respondents being female.

5.2.2 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.

5.2.3 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. 57% of the 2019 respondents were in full time employment and approximately 18% were in part time employment. Approximately 4% were not in employment at the time of the survey with a further 6.5% being students. Around one in ten respondents were retired.

Table 5.2
Economic Status of Respondents

Status	Raw Data	
	Frequency	Percent
Full time	280	57.0%
Part time	88	17.9%
Student	32	6.5%
Retired	47	9.6%
Unemployed	21	4.3%
No answer	23	4.7%
Total	**491**	**100.0%**

5.3.2 Table 5.3 indicates the residency status of respondents. The Cardiff and Non-Cardiff respondents are roughly equal at 37% and 33%. Around 30% of respondents failed to answer the question.

Table 5.3
Residency Status of Respondents

Status	Raw Data	
	Frequency	Percent
Cardiff	180	36.7%
Not Cardiff	161	32.8%
No Answer	150	30.5%
Total	**491**	**100.0%**

5.3.3 Table 5.4 shows the mobility requirements of the respondents and whether they have any health problems that limit their day-to-day activities. The table shows that 5% of respondents confirmed that they had health problems that cause limitations; a third of which were limited a lot by their health. Half of the respondents were not inhibited, 1 in 10 respondents preferred not to say. A third of respondents did not answer the question.

Table 5.4
Level of Limitation Owing to Health Problems

Status	Raw Data	
	Frequency	Percent
Yes, Limited a Lot	8	1.6%
Yes, Limited a Little	16	3.3%
No	251	51.1%
Prefer Not to Say	54	11.0%
No Answer	162	33.0%
Total	**491**	**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. Most respondents, around 76%, said no or did not answer the question. The remaining 24% of responses said that they had given up trying to flag down a taxi.

5.4.2 The 119 respondents who indicated that they had given up trying to flag down or wait at a rank were asked three subsequent questions: “If yes, where was your destination”, “If yes, what was your reason for giving up?”; “If yes, Why did you / the driver refuse?”, and “If yes, You can comment further or give a different reason here”. The responses to the latter three questions are shown in Tables 5.5, 5.6, and 5.7.

Table 5.5
Reasons for Giving Up Waiting

Reason	Raw Data	
	Frequency	Percent
Lack of taxis	41	34.5%
Taxi already booked	17	14.3%
Passenger refused the fare	32	26.9%
Driver refused the fare	24	20.2%
No Answer	5	4.2%
Total	**119**	**100.0%**

Table 5.6
Reason for Passenger / Driver Refusing Fare

Reason	Raw Data	
	Frequency	Percent
Driver not using meter	14	25.0%
Distance was too short	18	32.1%
Price	15	26.8%
No Answer	9	16.1%
Total	**56**	**100.0%**

Table 5.7
Further Comments or Alternative Reasons for Giving Up Waiting

Reason	Raw Data	
	Frequency	Percent
Too expensive	40	33.6%
Length of Journey – Too Short	30	25.2%
Lack of taxis at rank	25	21.0%
Driver competency	3	2.5%
Booked another vehicle	3	2.5%
Length of journey – Too long	2	1.7%
Driver did not want to leave rank	2	1.7%
Disabled accessibility	1	0.8%
No answer	13	10.9%
Total	**119**	**100.0%**

5.4.3 Of the 24% of respondents who stated they gave up waiting for a taxi, 41 (35%) said this was due to a lack of taxis. Further comments were provided by 11 of these respondents, five of whom suggested there were no taxis available in the area they were trying to hire a taxi. Other comments were related to the high price, the lack of a disabled access vehicle and the busy time of day for taxis.

5.4.4 Respondents were then asked if they thought all licensed vehicles (i.e. taxis and private hire vehicles) can pick up from ranks or be flagged down; their responses are summarised in Table 5.8. Around 40% of the respondents that answered this question correctly; that only licensed taxis can pick up from taxi ranks or be flagged down whereas PHVs cannot. This suggests that the general public has an overall lack of awareness of the difference between taxis and PHVs

Table 5.8
Public Awareness of the Difference Between Taxis and PHVs

Can all licensed vehicles pick up from ranks or be flagged down?	Raw Data	
	Frequency	Percent
Yes	207	42.2%
No	191	38.9%
No answer	93	18.9%
Total	**491**	**100.0%**

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 responses to this question are in Table 5.9 below.

Table 5.9
Journeys Made by Licensed Vehicle in the Last Month

Licensed Vehicle Journeys in the Last Month	Raw Data	
	Frequency	Percent
Yes	238	48.5%
No	227	46.2%
No answer	26	5.3%
Total	**491**	**100.0%**

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. hackney carriage or private hire vehicle);
- Vehicle quality
- Driver quality
- Price
- Waiting time

5.5.3 It should be noted that the number of total responses for each rating category does not exactly match the number of respondents that replied “Yes” in Table 5.9.

Type of Licensed Vehicle

5.5.4 The type of licensed vehicle used on the respondents' last trip is shown in Table 5.10 below; percentages are of those who answered the previous question in the affirmative not the total number of respondents. Around 40% of respondents used PHVs whilst approximately a quarter of respondents used Hackney Carriages. However, nearly 35% of respondents did not know what type of vehicle they used on their last trip.

Table 5.10
Licensed Vehicle Type for Last Trip

Licensed Vehicle Type	Raw Data	
	Frequency	Percent
Hackney Carriage	61	25.6%
PHV	95	39.9%
Do not know	81	34.0%
No Answer	1	0.4%
Total	**238**	**100.0%**

Vehicle Quality

5.5.5 Respondents were asked how they would rate the quality of the vehicle (Very Good, Good, Average, Poor, or Very Poor); percentages are of those who answered the question in Table 5.9 in the affirmative not the total number of respondents. Their responses are summarised in Table 5.11. Approximately 60% of the respondents considered the vehicle quality above average, around a third rated it about average, whilst one in 20 thought that it was below average. Taxis generally rated lower than PHVs for vehicle quality, with 51% of respondents rating them average or below, compared to 27% of PHVs.

Table 5.11
Rating of the Vehicle Quality of Last Journey

Type of Licensed Vehicle	Number of Answers	Vehicle Quality					
		Very Good	Good	Average	Poor	Very Poor	Total
Taxi	59	18.6%	30.5%	44.1%	1.7%	5.1%	**100.0%**
Private Hire Vehicle	95	29.5%	42.1%	22.1%	5.3%	0.0%	**98.9%**
Do not know	84	10.7%	40.5%	39.3%	4.8%	0.0%	**95.2%**
Total	**238**	**20.2%**	**38.7%**	**33.6%**	**4.2%**	**1.3%**	**97.9%**

Driver Quality

5.5.6 Respondents were asked how they would rate the quality of their driver (Very Good, Good, Average, Poor, or Very Poor); percentages are of those who answered the question in Table 5.9 in the affirmative not the total number of respondents. Their responses are summarised in Table 5.12. Driver quality has a slightly lower rating overall than the vehicle quality with around 9% of respondents considering the quality of their driver to be "Poor" or "Very Poor", approximately 35% consider their experience of the driver to be about average, and about 55% rated the driver to be above average quality. Similar to vehicle quality, taxis generally rated lower than PHVs for driver quality.

Table 5.12
Rating of the Driver Quality of Last Journey

Type of Licensed Vehicle	Number of Answers	Driver Quality					
		Very Good	Good	Average	Poor	Very Poor	Total
Taxi	59	18.6%	28.8%	32.2%	13.6%	6.8%	**100.0%**
Private Hire Vehicle	95	25.3%	41.1%	29.5%	3.2%	1.1%	**100.0%**
Don't Know	84	8.3%	40.5%	42.9%	6.0%	1.2%	**98.8%**
Total	**238**	**17.6%**	**37.8%**	**34.9%**	**6.7%**	**2.5%**	**99.6%**

Price

5.5.7 Respondents were asked how they would rate the price of the journey (Very Good, Good, Average, Poor, or Very Poor); percentages are of those who answered the question in Table 5.9 in the affirmative not the total number of respondents. Their responses are summarised in Table 5.13. Price has been rated the lowest of all the categories with approximately 16% considering the price to be Poor or Very Poor, just over 40% of the respondents thought that the price was Average, and around 42% thought that the fare was good value.

Table 5.13
Rating of the Price of the Last Journey

Type of Licensed Vehicle	Number of Answers	Price					
		Very Good	Good	Average	Poor	Very Poor	Total
Taxi	59	13.6%	20.3%	37.3%	20.3%	8.5%	**100.0%**
Private Hire Vehicle	95	20.0%	31.6%	38.9%	7.4%	2.1%	**100.0%**
Do not know	84	8.3%	28.6%	44.0%	13.1%	2.4%	**96.4%**
Total	**238**	**14.3%**	**27.7%**	**40.3%**	**12.6%**	**3.8%**	**98.7%**

Waiting Time

5.5.8 Respondents were asked how they would rate how reasonable they thought the waiting time was (Very Good, Good, Average, Poor, or Very Poor); percentages are of those who answered the question in Table 5.9 in the affirmative not the total number of respondents. Their responses are summarised in Table 5.14. Around half of the respondents thought that the waiting time was "Good" or "Very Good", about one third considered the waiting time to be average, and approximately 12% thought the waiting time was unreasonable.

Table 5.14
Rating of the waiting time of last journey

Type of Licensed Vehicle	Number of Answers	Waiting Time					
		Very Good	Good	Average	Poor	Very Poor	Total
Taxi	59	22.0%	23.7%	33.9%	10.2%	6.8%	**96.6%**
Private Hire Vehicle	95	30.5%	31.6%	32.6%	3.2%	1.1%	**98.9%**
Do not know	84	13.1%	33.3%	35.7%	16.7%	0.0%	**98.8%**
Total	**238**	**22.3%**	**30.3%**	**34.0%**	**9.7%**	**2.1%**	**98.3%**

5.5.9 Respondents were then given the opportunity to justify any "Poor" or lower ratings that they gave the previous categories; the percentage values are percentages of people who answered "Poor" or "Very Poor" in the previous four categories. This was an open question with no multiple-choice questions, but multiple respondents had the same comment. The comments are summarised in Table 5.15. The most cited reason for low ratings, according to 46% of the respondents, is

that the cost of using licensed vehicles is too high; which reflects the answers given to the previous questions. Driver competence and waiting time had similar numbers of comments; around 20% each. Vehicle Standard was also another sizable portion of comments at around 15%.

5.5.10 A few different comments made up around 15% of the responses; these included vehicles not arriving for pick up, inadequate disabled access, low overall quality of service, longer than reasonable journey time, and driver refusing the fare. It should be noted that the total responses for this question is higher than the number of people that rated their experience as poor; this is because of two main reasons. The first being that a few respondents didn't complete the survey correctly; the second is that some of the respondents gave multiple comments. This means that the values in the frequency column are representative of the number of comments rather than the number of respondents.

Table 5.15
Reasons for Rating Poor/Very Poor

Reasons for poor/very poor	Raw Data	
	Frequency	Percent
Expensive	26	49.1%
Waiting Time	13	24.5%
Driver Competency	11	20.8%
Vehicle Standard	8	15.1%
Vehicle Did Not Respond	2	3.8%
Disabled Access	2	3.8%
Long Journey Time	2	3.8%
Driver Refused Fare	2	3.8%
Quality of Service	1	1.9%
Total	**65**	**122.64%**

Frequency of Licensed Vehicle Use

5.5.11 Respondents were asked how regularly they use licensed vehicles to travel. Approximately 40% of respondents stated that their use of licensed vehicles was rare whilst one in ten said that they used them on a daily or weekly basis. Over a quarter of respondents stated that they used licensed vehicles once a month, around one in twenty use them once a year, and nearly 15% have never used a licensed vehicle. Of the respondents only 1% did not answer the question.

Table 5.16
Frequency of Licensed Vehicle Use

Frequency of Licensed Vehicle Use	Raw Data	
	Frequency	Percent
Daily	5	1.0%
Weekly	44	9.0%
Monthly	135	27.5%
Yearly	30	6.1%
Rarely	204	41.5%
Never	68	13.8%
No Answer	5	1.0%
Total	**491**	**100.0%**

Reasons for Not Using Licensed Vehicles More Often

5.5.12 Respondents were asked what their reasons were for not using licensed vehicles to travel more often; this is a non-multiple-choice question where respondents could answer the question however they saw fit. The responses are summarised in Table 5.17. The table shows that nearly half of the respondents did not answer the question. Of the other half of respondents, the main reasons for not taking a licensed vehicle is that a personal vehicle is preferable, they are too expensive, and that they simply do not need to use them. Together these reasons account for the attitude of 35% of the survey respondents.

5.5.13 The other 15% of respondents presented cited several different reasons; such as preferring other modes of transport, not feeling safe using licensed vehicles, had bad experience in the past, and not being local to the area. They also stated that they only take a taxi when their destination is not easy to get to. Two of the respondents said that they preferred to use app services such as Uber or Lyft; these are classified as private hire vehicles and suggests that a portion of the public is not aware of this.

Table 5.17
Reasons for Not Travelling Via Licensed Vehicle

Reason	Raw Data	
	Frequency	Percent
Prefers personal vehicle	74	15.1%
Expensive	55	11.2%
Does not need them	47	9.6%
Prefers other public transport	34	6.9%
Not Local to the Area	15	3.1%
Previous bad experience	14	2.9%
Does not feel safe	7	1.4%
Only when destination is secluded	3	0.6%
Prefers to cycle	2	0.4%
Prefers to use app service	2	0.4%
Prefers to walk	1	0.2%
Only uses them when travelling in a group	1	0.2%
No Answer	236	48.1%
Total	**491**	**100.0%**

Method of Hire

5.5.14 This question asked respondents how they generally pick up a licensed vehicle. The number of responses to this question exceeds the number of survey respondents; the question instructed respondents to select all the means that they personally hire vehicles so some of the respondent haves selected multiple responses. Table 5.18 summarises the responses.

5.5.15 The table shows that over a third of the responses state that they pick up a taxi by phoning in advance. Hiring from a rank and hiring online or by using an app are roughly split; each are about a quarter of the responses. Approximately 15% of the time people flag cabs down and 2% other means are used. All respondents to the survey answered this question.

Table 5.18
Method of Licensed Vehicle Hire

Method of hire	Raw Data	
	Frequency	Percent
Phone	213	37.3%
Online/App	140	24.5%
Rank	132	23.1%
Flagged	77	13.5%
Other	9	1.8%
No Answer	0	0.0%
Total	**491**	**100.0%**

Passenger Safety

5.5.16 Respondents were asked whether they felt safe using the taxis in Cardiff; the answers are binary yes or no. Most respondents (56.2%) said that they felt safe when using Taxis and PHVs. Approximately 17% of respondents did not feel safe and around a quarter did not answer the question.

Safety Improvement Suggestions

5.5.17 Respondents were asked if they did not feel safe in using licensed vehicles in Cardiff; what improvements could be made to make them feel more secure. The responses to this question are summarised in Table 5.20. The total number of respondents for this question exceeds the number of respondents that answered “no” in the previous question. As a result, some of the responses to this question may not be related to improving safety and would be classified under general improvements. The total for the no answer category only includes those who answered “no” in the previous question, this accounts for about 15% of the total respondents for this question. The total in Table 5.20 includes all that responded to this question as well as everyone who answered “no” in the previous question and did not answer this one.

5.5.18 The table shows that most responses relate in some way to improving safety of taxis. Improvements to regulations represent around 24% of the responses, approximately 26% relate to improving customer service and diversifying the driver pool, and 24% are infrastructure improvements such as adding panic buttons to licensed vehicles. The remainder of people that answered this question voiced improvements to driver training, language training, and pricing structure; the latter specifically refers to making the use of the meter mandatory.

Table 5.20
Suggested Improvements to Passenger Safety

Suggestions	Raw Data	
	Frequency	Percent
Improve Customer Service and Driver Diversity	23	25.6%
More stringent regulation	21	23.3%
Improve safety measures	19	21.1%
Improve Driver Training	8	8.9%
Improve Driver Language Skills (English and Welsh)	2	2.2%
Reduce the Price / Mandatory Meter Usage	1	1.1%
No Answer	16	17.8%
Total	**90**	**109.8%**

Understanding of Fares

5.5.19 Respondents were asked what they thought a daytime three-mile journey would cost. The responses are summarised in Table 5.21. Approximately 44% of respondents did not answer the question; all those that did estimated that it would cost below £10. Around one in five respondents thought that the cost of the journey would be below £5 whilst around a third estimated that it would cost between £5 and £9.

Table 5.21
Price Estimates for a Three Mile Journey

Licensed Vehicle Type	Raw Data	
	Frequency	Percent
£0.01 - £1.00	0	0.0%
£1.01 - £2.00	1	0.2%
£2.01 - £3.00	12	2.4%
£3.01 - £4.00	14	2.9%
£4.01 - £5.00	83	16.9%
£5.01 - £6.00	57	11.6%
£6.01 - £7.00	43	8.8%
£7.01 - £8.00	47	9.6%
£8.01 - £9.00	19	3.9%
£9.01 - £10.00	0	0.0%
£10.01 - £12.50	0	0.0%
£12.51 - £15.00	0	0.0%
£15.01 - £17.50	0	0.0%
£17.51 - £20.00	0	0.0%
£20.01 - £30.00	0	0.0%
£30.01 - £100.00	0	0.0%
Don't know	1	0.2%
Other	0	0.0%
No Answer	214	43.6%
Total	**491**	**100.0%**

Cardiff Taxi Numbers

5.5.20 Respondents were asked whether they thought that Cardiff had enough taxis. Table 5.22 summarises the responses to this question. The table shows that around half of respondents did not know whether the number of licensed vehicles were sufficiently meeting demand. Approximately 34% thought that the quantity of taxis was sufficient, compared with 9% who felt there are insufficient numbers. Around 9% of the respondents did not answer the question.

Table 5.21
Licensed Vehicles Meeting Demand

Taxi Numbers	Raw Data	
	Frequency	Percent
Sufficient	168	34.2%
Insufficient	44	9.0%
Do not know	237	48.3%
No Answer	42	8.6%
Total	**491**	**100.0%**

Taxi Improvement Suggestions

5.5.21 Respondents were asked what improvements could be made to licensed vehicles in Cardiff. Table 5.23 summarises the responses. Note that the values in the frequency column refer to suggestions rather than respondents; each respondent can make more than one suggestion. The table shows that approximately 40% of respondents answered this question; of those around a quarter suggested improvements to vehicle and driver regulation. Another quarter cited customer service as an aspect of Cardiff taxis that needs to improve. Reductions in fares and increasing the number of ranks had similar quantities of suggestions at roughly 15% of the suggestions made each.

5.5.22 Around one in ten suggestions stated that the taxi numbers needed to increase where as one in twenty say that their numbers need to be reduced. Suggestions related to driver training accounted for about 5% of the improvements, 2% said that efficiency needed to be improved, and one respondent suggested that they shouldn't be called "Hackney Carriages".

Table 5.22
Suggested Improvements to Taxis Within Cardiff

Suggestions	Raw Data	
	Frequency	Percent
Vehicle and driver regulation	48	9.8%
Customer service	45	9.2%
Increase number of ranks and improve quality	32	6.5%
Reduce fare and make meter usage mandatory	25	5.1%
Increase number of taxis	17	3.5%
Driver training	10	2.0%
Reduce number of taxis	8	1.6%
Security for passengers	4	0.8%
Improve efficiency	4	0.8%
Should not be called Hackney Carriages	1	0.2%
No Answer	302	61.5%
Total	**496**	**101.0%**

Location of new ranks

5.5.23 Respondents were then asked where they would like to see new ranks. The summary of suggestions is in Table 5.23. As with the "Taxi Improvements Suggestions", the frequency column refers to the number of suggestions rather than respondents. Some respondents made more than one recommendation which is why the total in the table is greater than the total number of respondents. Approximately 66% of the survey respondents provided no suggestions.

5.5.24 Approximately 10 percent of the suggestions state that there needs to be more ranks in the city centre; some sites were further specified such as, Motorpoint Arena, Principality Stadium, Westgate Street, Greyfriars Road, and Churchill Way. Many of these areas already have ranks in them; it is likely that they are recommending expansions to these existing ranks. Around 5% of the suggestions indicate that more ranks are wanted in the Cardiff Bay area. Another 5% of suggestions voice a need for more ranks in the more suburban areas of Cardiff and in areas that are not in the city centre. Approximately 2.5% of the suggestions placed the hospital as a location that requires more taxi ranks. As with the recommendation of more ranks in the city centre, there is already a taxi rank outside Heath Hospital; this may mean that the respondents want the rank expanded or its operation hours increased.

5.5.25 Some of the suggestions did not provide specific locations, rather places where the demand required it, or where the ranks would not cause heavy congestion; these account for around 2.5% of the responses. Approximately 3% of the suggestions rejected the notion that more ranks were needed in Cardiff.

Table 5.23
Suggestions of New Taxi Rank Locations

Suggestions	Raw Data	
	Frequency	Percent
Centre of Cardiff	45	9.2%
Cardiff Bay	27	5.5%
Hospital	13	2.6%
Edge of the City Centre/Cardiff	11	2.2%
Everywhere	10	2.0%
Areas where demand is large	10	2.0%
Near the train station	7	1.4%
Penarth	4	0.8%
Newport Road	4	0.8%
Vale of Glamorgan	3	0.6%
Principality Stadium/Motorpoint Arena	2	0.4%
Airport	2	0.4%
Greyfriars Road	2	0.4%
In areas that are not prone to heavy congestion	2	0.4%
Heavily populated areas	1	0.2%
Newly finished developments	1	0.2%
Sully	1	0.2%
Churchill Way	1	0.2%
Westgate Street	1	0.2%
Cathays	1	0.2%
Wants more ranks but unsure of the location	3	0.6%
No more ranks	15	3.1%
No answer	333	67.8%
Total	**499**	**101.63%**

Other Comments

5.5.26 Respondents were then given the opportunity to add any comments that they had about Cardiff licensed vehicles. The responses are summarised in Table 5.24. As with the other written answers in this survey, all values in the frequency column other than "no answer" refer to the number of comments rather than the number of comments; the total is the sum of comments and respondents that did not answer the question. The majority of respondents, approximately 75% of respondents did not provide further comments.

5.5.27 The two most common comments have an even split at around 4% each; one called for non-Cardiff Taxis to be banned from operating within the city limits, the other said that the cost of trips should be made cheaper. Comments about improving driver training and regulation accounts for approximately 6% of the total. Other comments of note include reference to a disproportionate distribution of taxis across Cardiff, and reiteration of lack of good customer service and lack of safety features. More, less frequent comments include reference to a lack of diversity in the driver pool, requests for more penalties for discrimination, complaints about PHV response times, recommendations on improving disabled access, declarations that public transport is preferable. Some of the respondents, around 1.5%, took this as an opportunity to voice their satisfaction of the taxis and PHVs in Cardiff.

Table 5.24
Other Comments on Cardiff Licensed Vehicles

Suggestions	Raw Data	
	Frequency	Percent
Reduce the cost of trips	22	4.5%
Ban non-Cardiff registered vehicles from operating within the city	21	4.3%
Improve licensed vehicle regulation	18	3.7%
Improve driver training	13	2.6%
There is unmet demand and excess supply in different places	11	2.2%
Driver customer service is poor / drivers are rude	11	2.2%
Licensed vehicles need to be safer for passengers	10	2.0%
Opinion of taxi service is good	6	1.2%
Drivers are refusing short trips	5	1.0%
Disabled and elderly access to licensed vehicles is needed	4	0.8%
Ban drivers from discriminating behaviour	3	0.6%
Licensed vehicles are generally bad	3	0.6%
Increase the diversity of the driver pool / more female drivers	2	0.4%
Public transport is cheaper and easier	2	0.4%
Response time for private hire vehicles is unsatisfactory	1	0.2%
No more ranks are needed	1	0.2%
No answer	376	76.6%
Total	**509**	**103.67%**

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"*.[5]

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.

[5] 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 each rank in each 5-minute period surveyed. Based on these calculations the prevailing 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 rank was empty)

6.2.4 Where the 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

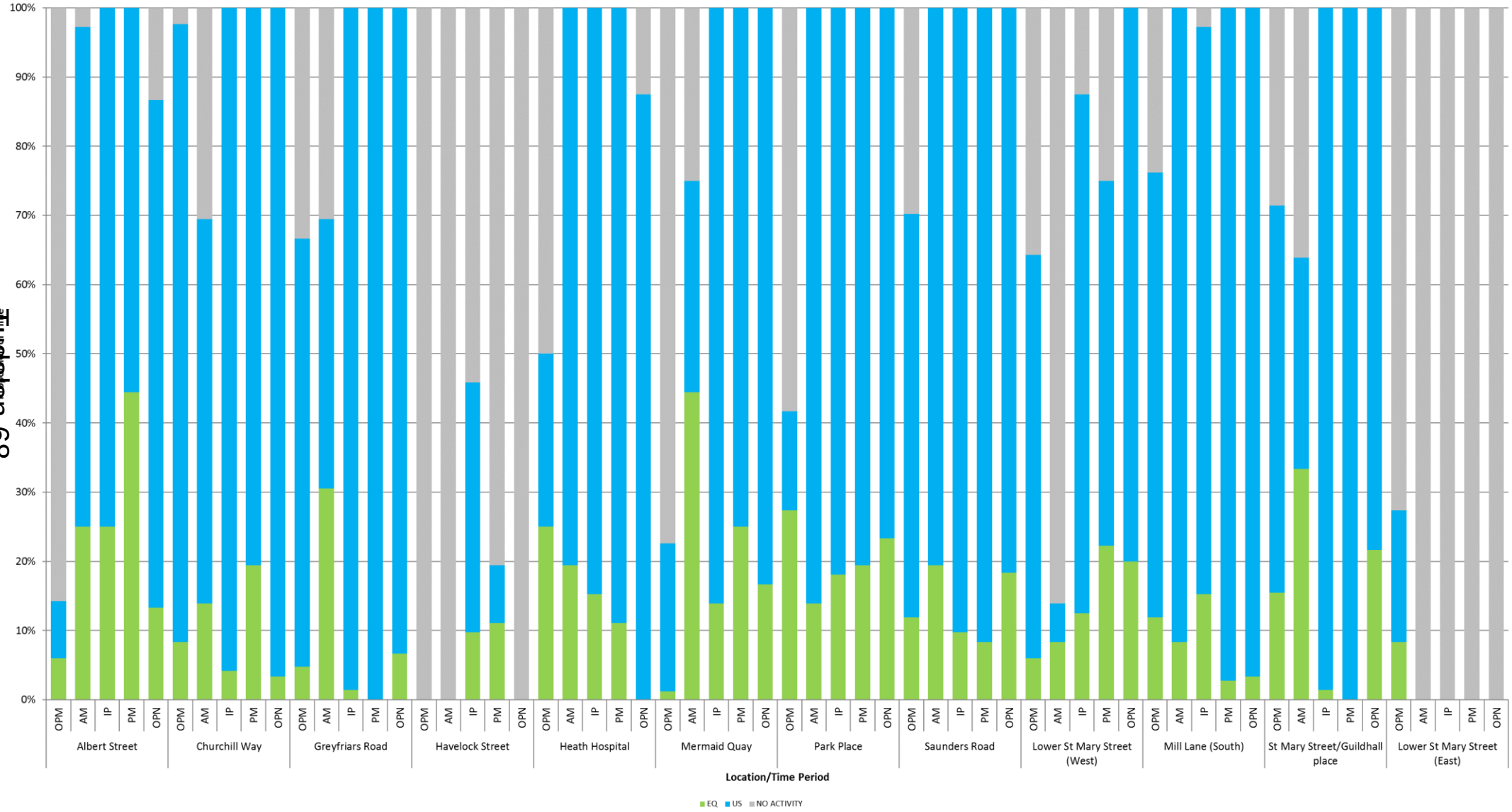


Figure 6.2
Analysis of Market Conditions: Weekday Unofficial Ranks

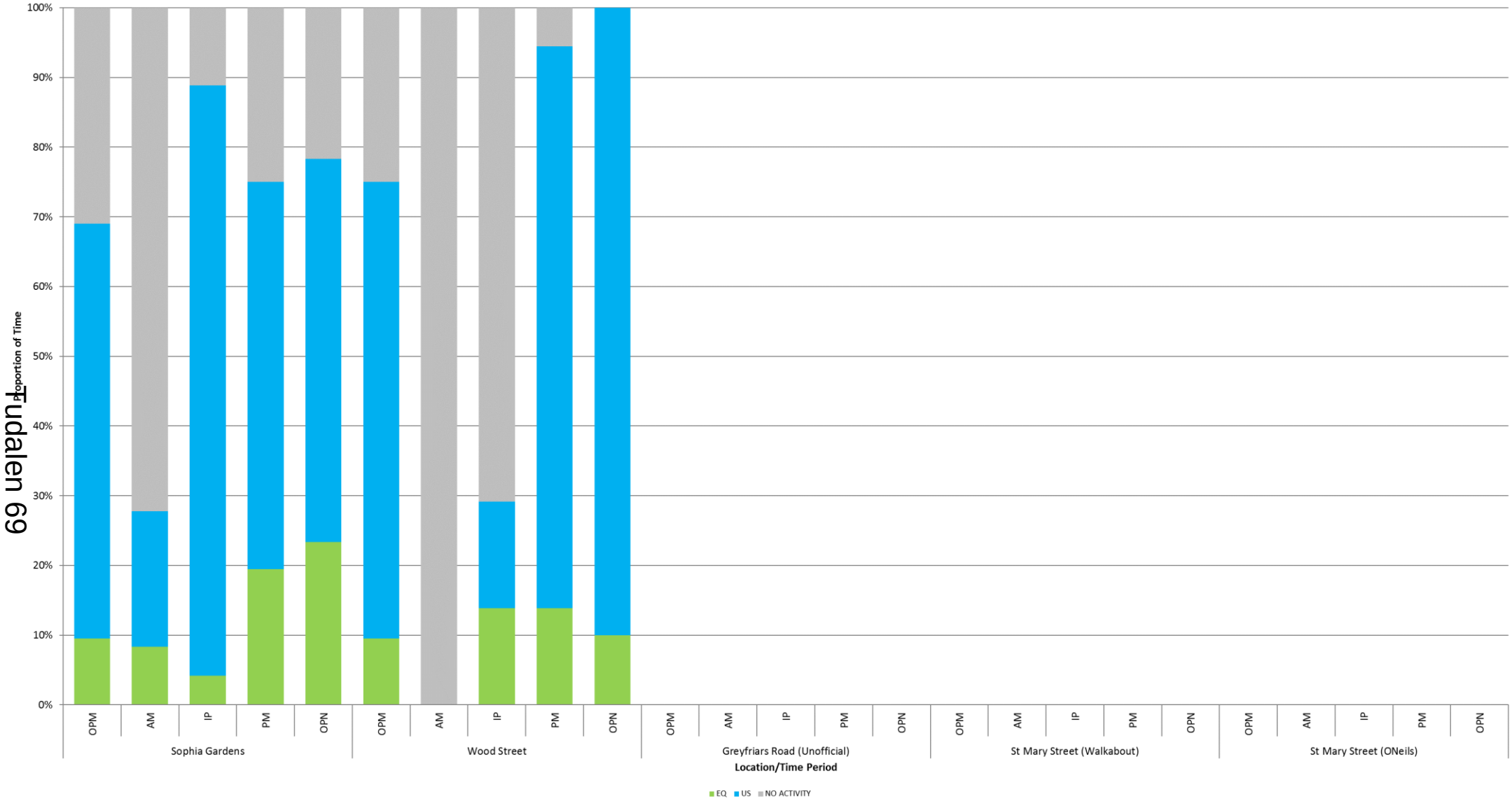


Figure 6.3
Analysis of Market Conditions: Weekend Official Ranks

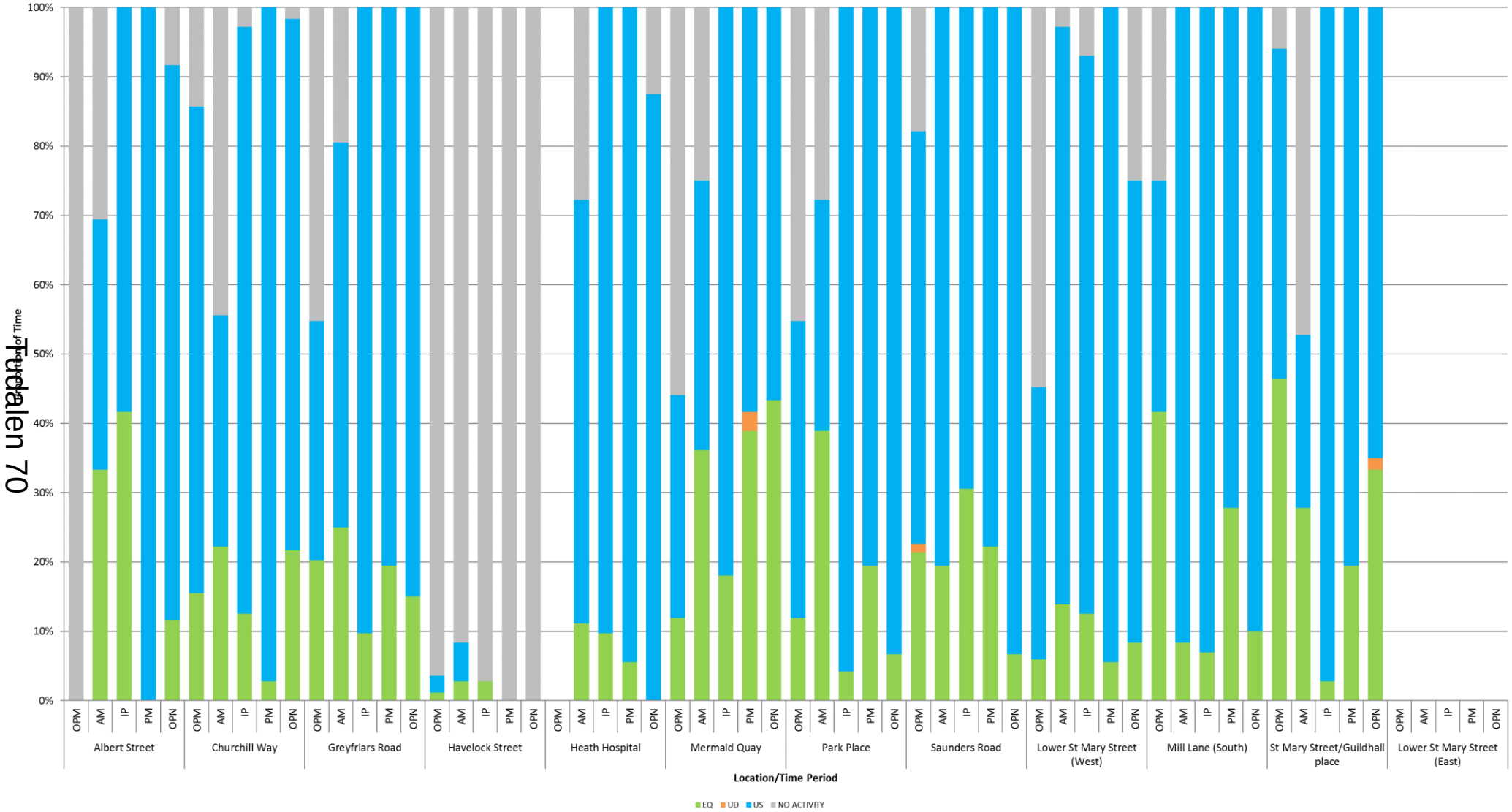


Figure 6.4
Analysis of Market Conditions: Weekend Unofficial Ranks

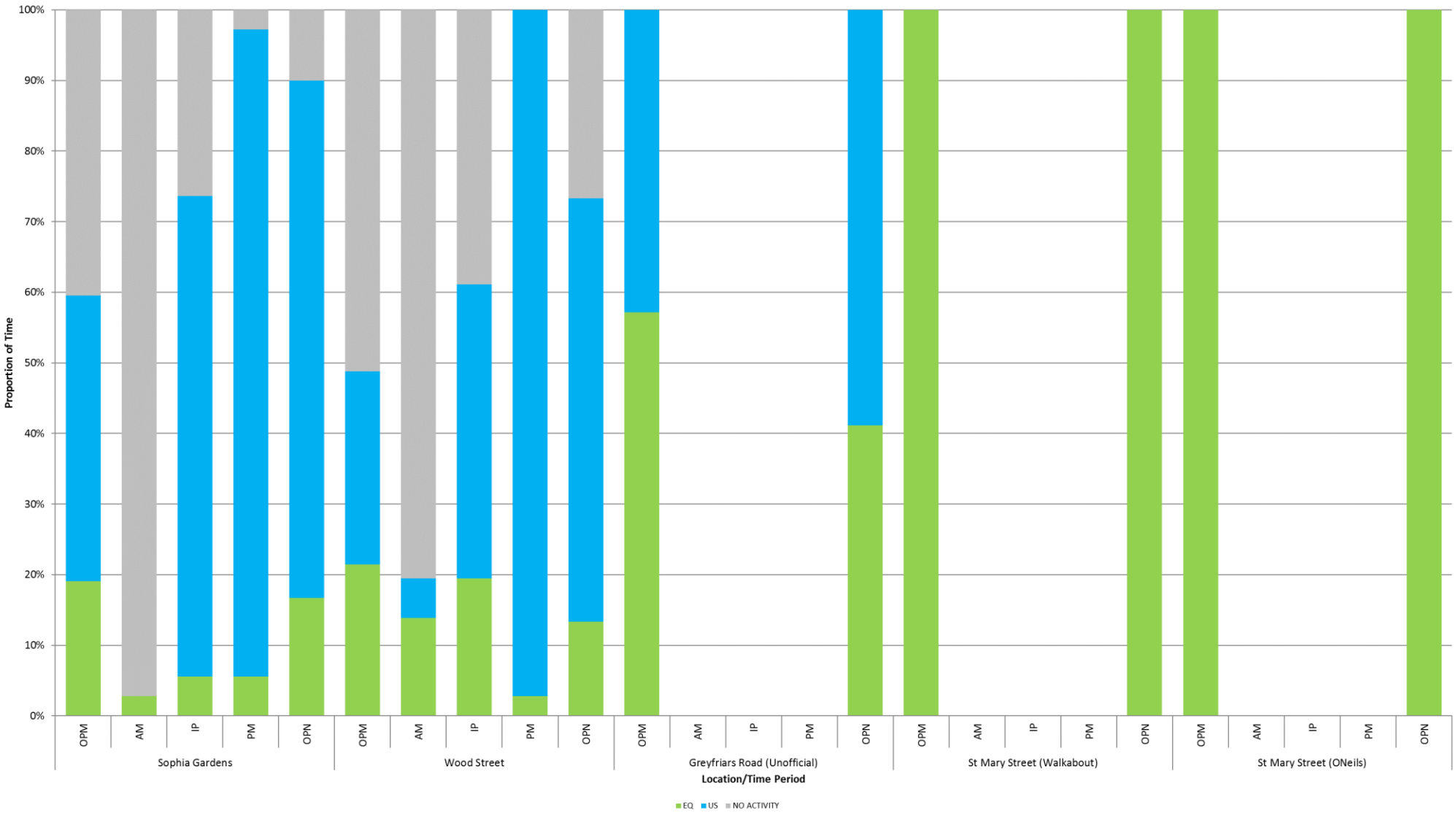


Figure 6.5
Analysis of Market Conditions: Sunday Official Ranks

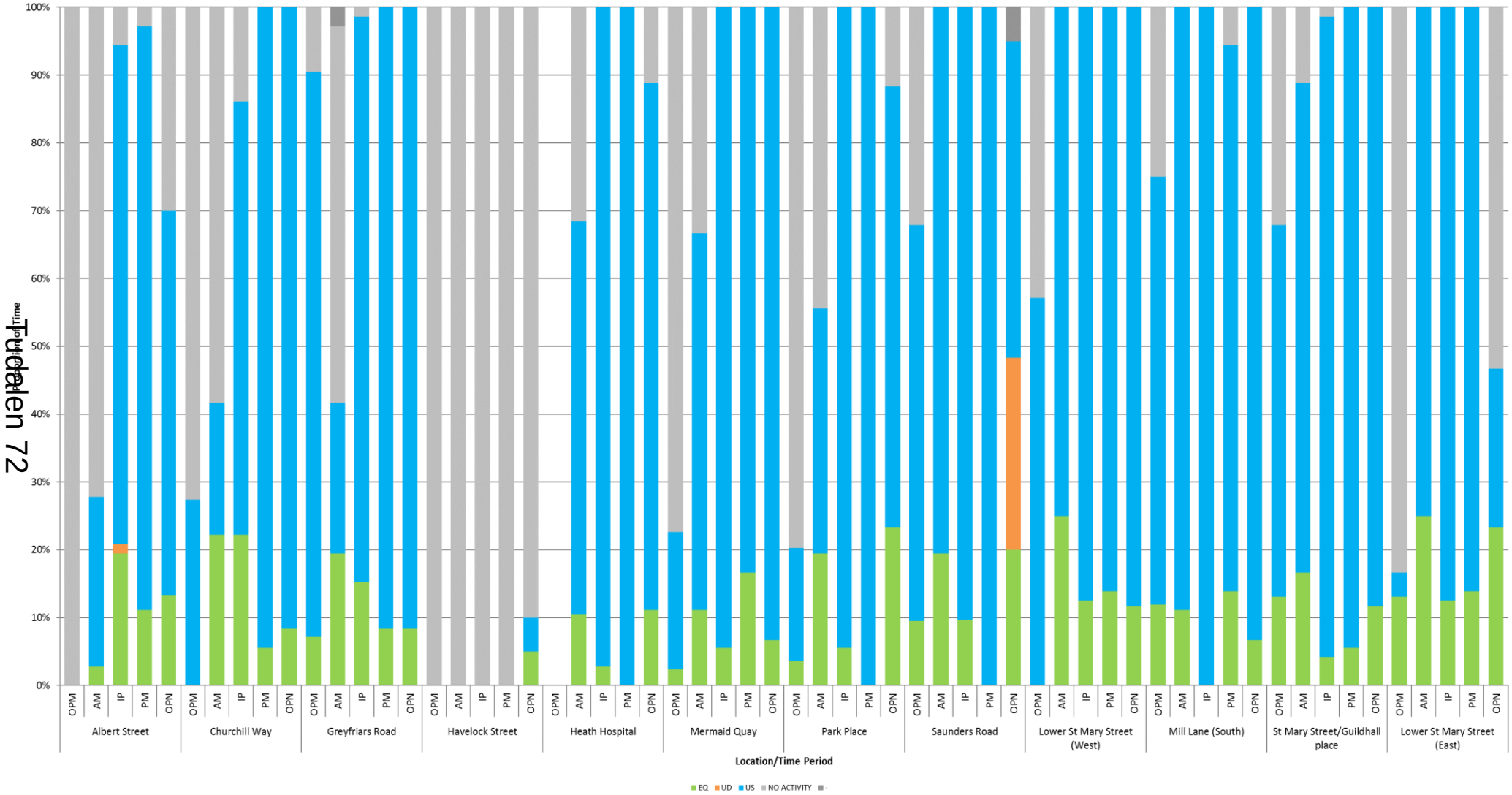
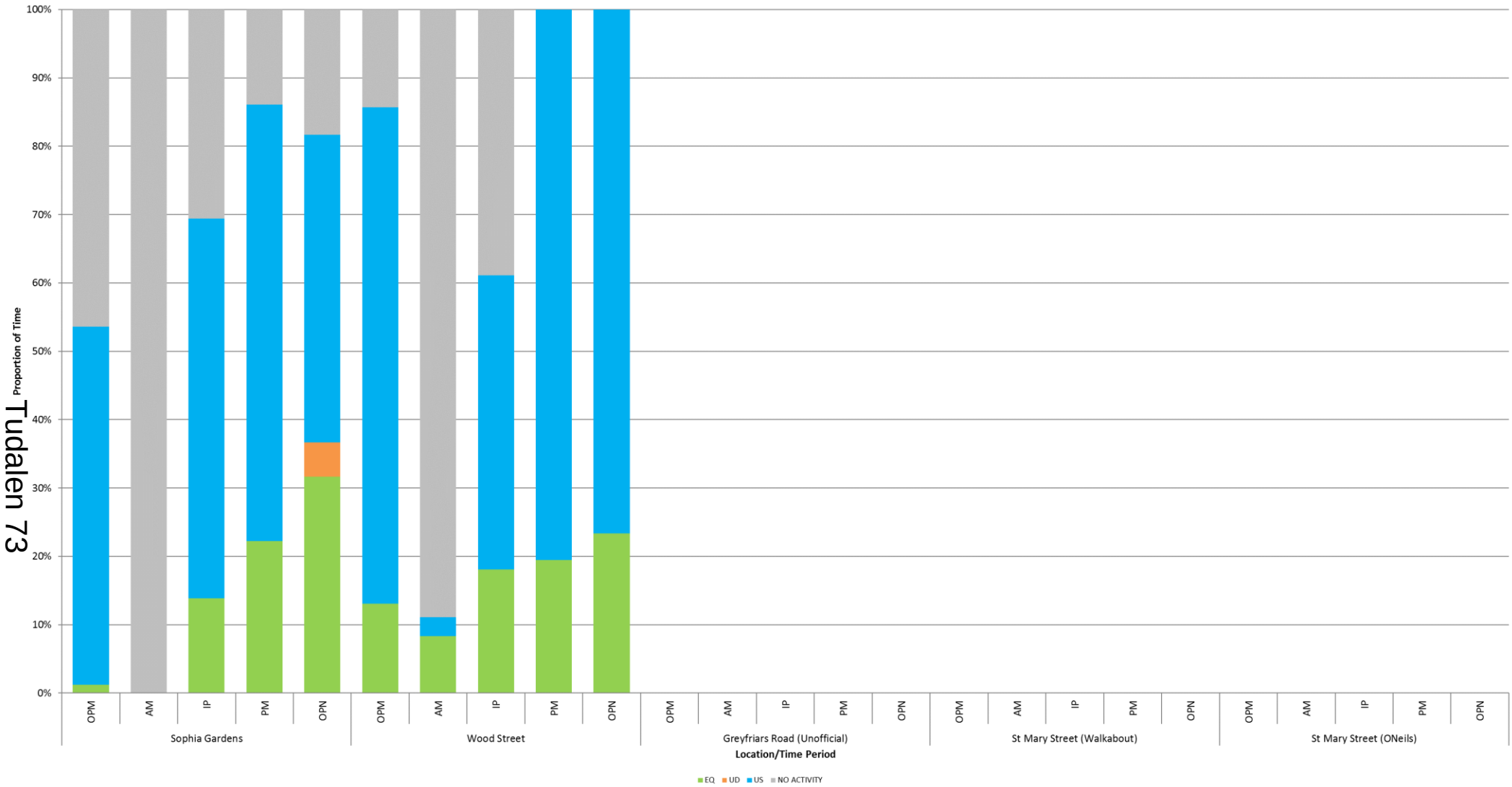


Figure 6.6
Analysis of Market Conditions: Sunday Unofficial Ranks



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 The most notable incident of unmet demand occurs during the measured Sunday off-peak night (OPN) period on Saunders Road; this rank primarily services rail users due to its proximity to Cardiff Central Rail Station. The rank experienced a twenty-minute period of unmet demand starting at 20:55, followed by approximately one hours' worth of intermittent unmet demand between 22:05 and 23:25. Between the first and second period of unmet demand the rank experienced a 45-minute period equilibrium or unused supply. During the period of intermittent unmet demand, there were recordings of equilibrium. Average taxi delay just before the second period of unmet demand was approximately ten minutes; this implies that a large queue of passengers built up over the following five-minute period. This is likely caused by several trains arriving consecutively and many passengers seeking to travel by taxi. The rank would have emptied quickly as a result; it would also take some time to fill back up again. This theory is supported by calls for increased rank space at the station.

6.2.7 Other incidents of unmet demand occur on the weekend surveyed periods on the Mermaid Quay, Saunders Road, and St Mary Street / Guildhall Place. The Mermaid Quay rank experiences a five-minute period of unmet demand starting at 16:30; it is at equilibrium for the time periods either side of this. The rank on Saunders Road also experiences a five-minute period of unmet demand starting at 02:40; 25 minutes preceding this, the rank had unused supply with long driver wait times, it is likely that a large number of rail passengers emptied the rank very quickly. There is a period of unmet demand on the St Mary Street / Guildhall Place rank that starts at 23:50 and lasts for five minutes; the rank is in equilibrium on either side of this period. These incidents are isolated and are not indicative of a problem caused by an insufficient number of licensed vehicles within the city.

6.2.8 The unofficial Sophia Gardens rank experiences a total of 15 minutes of unmet demand on the observed Sunday period; one five-minute period starting at 21:30 and a ten-minute period starting at 22:35. The conditions on either side of both of these periods is either in equilibrium or there is no activity. As this is the National Express coach drop-off/pick-up, it is likely this is due to a coach arriving and a large number of passengers attempting to hire a taxi at the same time.

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 5.22, 3.4% indicated that there should be an increase in taxis whilst 1.6% felt that there should be a reduction in the number of taxis. This suggests that the general public do not feel that there are too many taxis in Cardiff, or at least do not perceive it to be a significant problem.

6.3.2 Overall the public attitude survey did not indicate the need for more taxis. Table 5.5 shows that of the 119 respondents that said that they gave up flagging down a taxi, 41 indicated that this was from a lack of taxis. However, this is not backed up by the rank surveys as only 87 people walked away from the rank whilst 7,163 left in a taxi. Furthermore, when asked whether they felt that there were sufficient numbers of taxis in Cardiff, 34% said that there are and 9% said that there are not. In addition, "lack of taxis" was not cited as a reason for why respondents did not use taxis more regularly.

7 Comparison with 2016 Study

7 Comparison with 2016 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 2019 taxi rank survey and the public attitude survey have been compared with the results of the previous 2016 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 survey methodology was the same between 2016 and 2019, and so is directly comparable.

7.2.2 The DfT guidance references three points licence quantity controls should not do. Therefore, it is useful to compare the 2016 data to see what affect the moratorium is having. 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

7.2.3 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.

7.2.4 Figures 7.1 – 7.3 below show the comparisons between 2019 and 2016.

Figure 7.1: Comparison of Average Passenger Demand

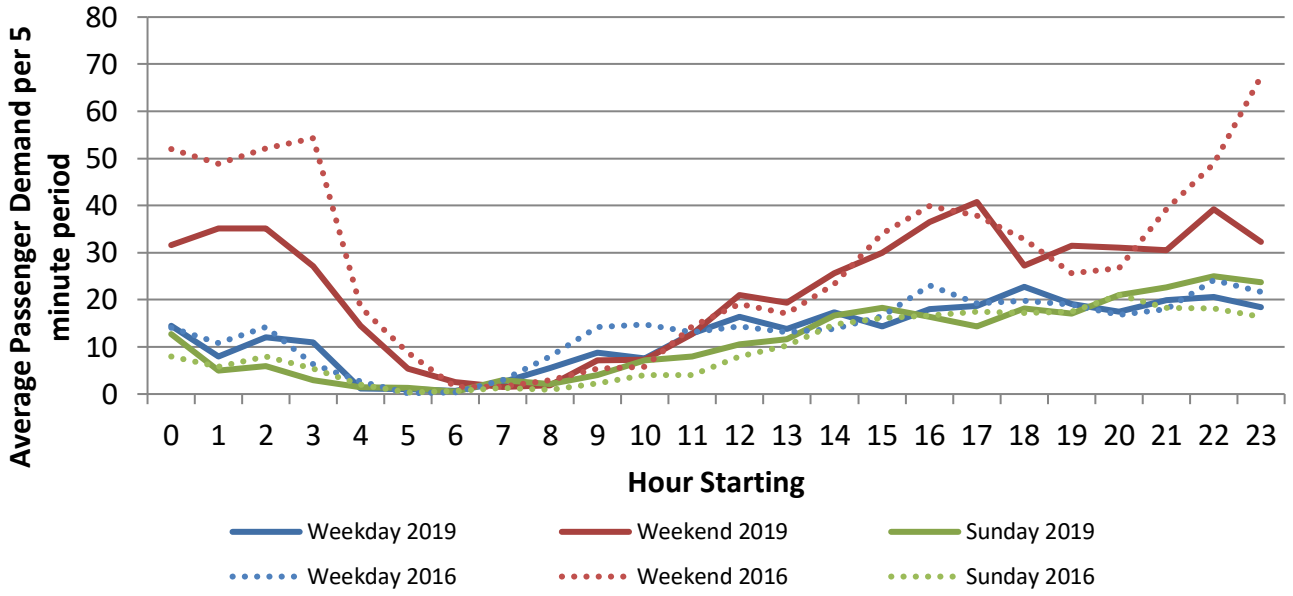


Figure 7.2: Comparison of Effective Taxi Demand

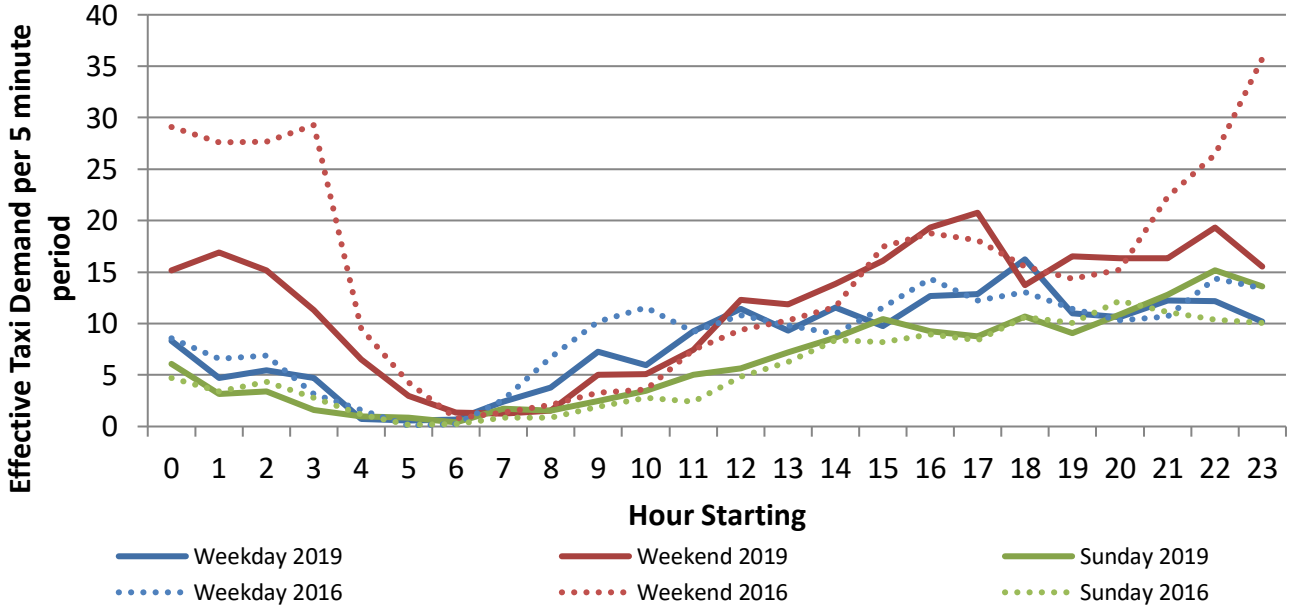
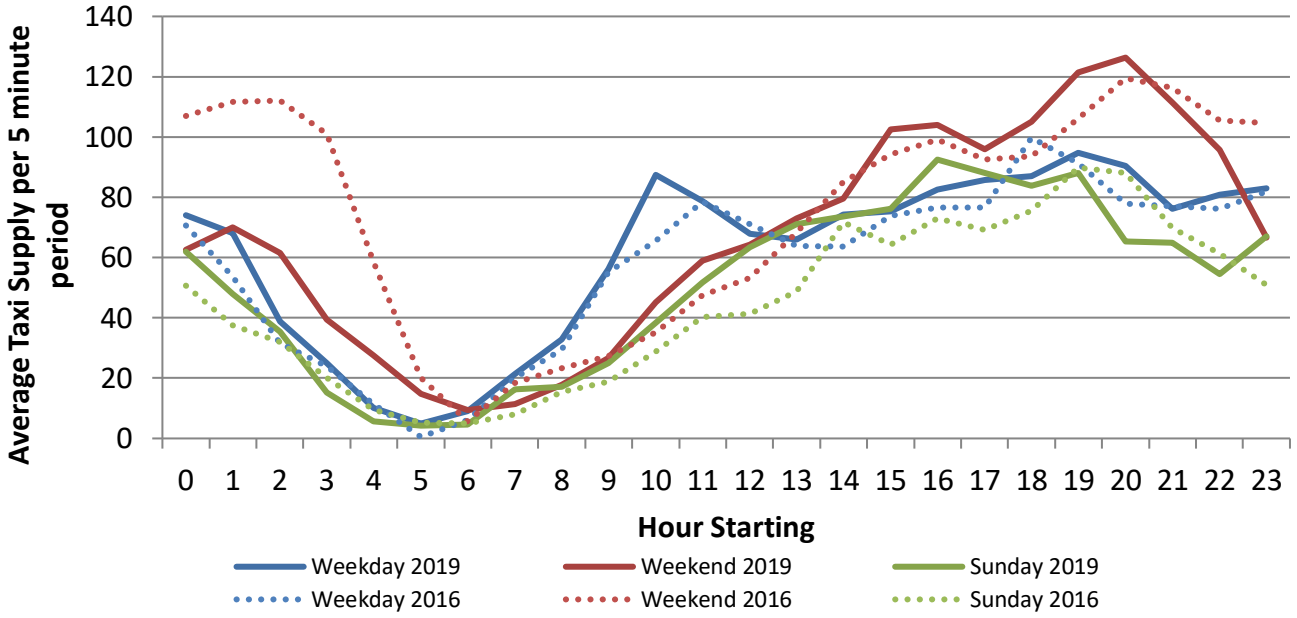


Figure 7.3: Comparison of Average Taxi Supply



7.2.5 The most significant change between 2016 and 2019 is the reduction in activity on the weekends in the late evening and early morning; the greatest reduction occurs around midnight where the effective taxi demand and the passenger demand reduces by 50%. The reduction in passenger demand during this period is around 30%, effective taxi demand and supply has reduced by 40%. The conditions for the Weekday and Sunday have remained relatively consistent; one deviation is between 08:00 and 10:00 where both passenger and taxis demand reduces by 50%.

7.2.6 The correlation between passenger demand and taxi supply has not changed between the two years; the peak and trough periods for demand and supply are comparable. The passenger demand drops to nearly zero at around 05:00-06:00 across all three average day types; the taxi supply during this period is also zero but begins to build up an hour before passenger demand begins to rise.

Change in Passenger Wait Time

7.2.7 Table 7.1 compares the average passenger wait times in 2016 and 2019, to see if there has been an increase in wait time for passengers whilst the moratorium is in place.

Table 7.1
Comparison of Average Passenger Wait Times

Location	2016				2019			
	Weekday	Weekend	Sunday	Overall	Weekday	Weekend	Sunday	Overall
Albert Street	0.0	0.0	0.0	**0.0**	0.0	0.0	0.6	**0.2**
Churchill Way	3.7	0.8	3.1	**2.6**	0.0	0.0	0.0	**0.0**
Greyfriars Road	0.0	0.0	0.0	**0.0**	0.0	0.0	1.1	**0.4**
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	0.0	0.8	**0.3**	0.0	0.5	0.0	**0.2**
Mill Lane (South)	0.0	0.0	0.0	**0.0**	0.4	0.0	0.0	**0.1**
Park Place	0.5	0.0	0.0	**0.2**	0.0	0.0	0.0	**0.0**
Saunders Road	0.0	0.0	0.0	**0.0**	0.0	1.9	23.7	**8.5**
St Mary Street / Guildhall Pl	0.0	1.9	0.0	**0.0**	0.0	1.2	0.0	**0.4**
Tredegar St	0.0	0.0	0.0	**0.0**				
Duke St / Castle St	-	0.0	-	**0.0**				
Kingsway	-	-	-	**-**				
Marshalled - Mill Lane	-	-	-	**-**				
Greyfriars Road (Unofficial)	-	7.6	-	**0.0**	-	0.0	-	**0.0**
Sophia Gardens	7.6	3.4	16.1	**8.9**	0.0	0.0	2.4	**0.8**
St Mary St (O'Neill's)	0.0	0.0	-	**0.0**	-	0.0	-	**0.0**
St Mary St (Walkabout)					-	0.0	-	**0.0**
Wood St / Westgate St	0.0	0.0	-	**0**	0.0	0.0	0.0	**0.0**
Grand Total	**0.8**	**0.5**	**1.5**	**0.9**	**0.0**	**0.3**	**2.1**	**0.8**

Official ranks shown in grey no longer exist, and unofficial ranks have changed

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

7.2.8 The analysis indicates that the overall passenger wait time was 0.9 seconds in 2016 and 0.8 seconds in 2019; showing a marginal decrease over the three years. This includes the wait times on the Saunders Road rank which, as discussed previously, come as a result of periods of unmet demand. However, these were isolated incidents were not representative of the rank, and therefore do not have a significant impact on the overall passenger wait time. There is evidence to suggest this may be due to the size of the rank rather than taxi supply.

Change in Significant Unmet Demand

7.2.9 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 7.2
2016 and 2019 Market Conditions Comparison

Market Condition	Weekday		Weekend		Sunday	
	2016	**2019**	**2016**	**2019**	**2016**	**2019**
Equilibrium (EQ)	11.27%	11.59%	21.81%	16.43%	9.22%	10.23%
Unmet Demand (UD)	0.28%	0.00%	0.18%	0.08%	0.26%	0.54%
Unused Supply (US)	51.83%	59.58%	54.75%	58.82%	55.34%	60.44%
Unstable	0.07%	0.00%	0.05%	0.00%	0.03%	0.10%
No Activity	36.54%	28.83%	23.22%	24.67%	35.16%	28.69%
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

7.2.10 The results show that on weekends the amount of time that the market is operating in equilibrium has decreased by a few percentage points, and on weekdays and Sundays has increased by approximately 1%. The proportion of time where there is unmet demand has slightly decreased on weekdays and weekends and a slight increase on Sundays. The proportion of time where there is unused supply has increased by around 5% on both weekends and Sundays, whilst on weekdays it has increased by approximately 8%. Overall the assessment shows that the market conditions have remained largely unchanged since 2016, suggesting that 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 491 people on the streets of Cardiff in 2019, 733 in 2016, and 1000 in 2013. Many questions were unchanged from the 2016 study. A question was added to determine whether respondents whether they had health issues that limited their ability to travel. The reduced sample was compared to the 2011 census to confirm it was comparable and therefore deemed a suitable representation.

7.4 Availability of Taxis

7.4.1 In 2013, 2016, and 2019 respondents were asked to give suggestions for improvements to taxi service. In 2013, improved availability was listed by 3.5% of the respondents in comparison to 0.4% in 2016 and 3.4% in 2019. In contrast, reduced taxi numbers were listed by 0.4% in 2013, 0.5% in 2016, and 1.6% in 2019.

7.4.2 Additionally, respondents were asked to give the reasons they did not use licensed vehicles more often in 2016 and 2019. Availability was listed by 1.2% in 2016 and wasn't cited at all in 2019. These results indicate that there has been very little change in public perception on availability, particularly with the drop in reasons for why licensed vehicles are not used more often. Respondents were asked directly whether they felt that there are enough taxis in Cardiff, with 9.0% reporting insufficient numbers in 2019 compared with the 7.8% in 2016, suggesting little change over the last 3 years and no emerging problem.

7.5 Understanding of Taxis and Private Hire Vehicles

7.5.1 In both years, the question on whether the respondent thought that all licensed vehicles can be hired on ranks and by flagging them down was asked. In 2016 30% said yes compared with 38.9% in 2019 showing that understanding has reduced. Furthermore 42% said no in 2019 compared with 52% in 2016.

7.6 Suggested Improvements

7.6.1 In 2016, the top rated suggestion improvements were related to the cost of fares and customer service. This has been replicated in the 2019 survey as well as showing an increase of suggestions for improvements to regulation, implying that the situation has not improved over the last three years. A further comment that rated highly was banning licensed vehicles not registered in Cardiff from operation in the city. This is a new trend which wasn't highlighted in the 2016 study.

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 further studies in 2013 and 2016.

8.1.2 Under Department for Transport (DfT) Taxi and Private Hire Vehicle Licensing Best Practice Guidance[6], 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 2019: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2019: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2019: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2019: 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 Survey was very thorough, providing an almost complete assessment of all sites at all times. The exception being the unofficial ranks where surveys were conducted during the operating hours.

8.1.8 Surveys show the passenger demand on weekdays begins to build at around 07:00 reaching a peak at around 18:00. The Sunday surveys show a similar trend whilst the weekend profile is greatly exaggerated.

8.1.9 Occupancy surveys suggest an average occupancy of 1.8 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.

8.1.10 Effective taxi demand and taxi supply follow a similar profile as the passenger demand 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.

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

8.1.11 Passenger delay analysis showed no delays being experienced by passengers; the average delay time is 0.8 seconds. There is an exception to this where passengers at Saunders Road on Sunday experience a delay of almost 2 minutes. The reason for this is attributed to the fact that this is the rank that services the rail station and as a result is subjected to periods of high demand. The continual supply of taxis suggests the size of the rank may be in part a cause of the delay, which is supported by comments in the public attitude survey.

8.1.12 The public attitude survey highlighted a possible lack of awareness of the difference between Taxis and PHVs; 38.9% of survey respondents believed that all licensed vehicles can pick up from a taxi rank or be hailed at the roadside.

8.1.13 The survey asked how much people thought a specified trip would cost, the results showed a more refined spread of responses when compared to 2016. This shows that the public awareness of the pricing structure has improved.

8.1.14 The main reasons stated for not using licensed vehicles were a preference for alternative means of transportation, followed by the cost is too high, and that they simply “don’t need to” use them. All other reasons, including concerns about safety, previous bad experience, and not being local to the area were given by below 5% of the respondents.

8.1.15 There was a low response to the question about potential improvements to the taxi service; around 61% of respondents didn’t answer the question. For those that did answer it, a large number of the suggestions were related to improvements to customer service, taxi regulation, and reducing the cost of fares. 3.5% of suggestions called for an increase in taxi numbers whilst 1.6% want their numbers reduced.

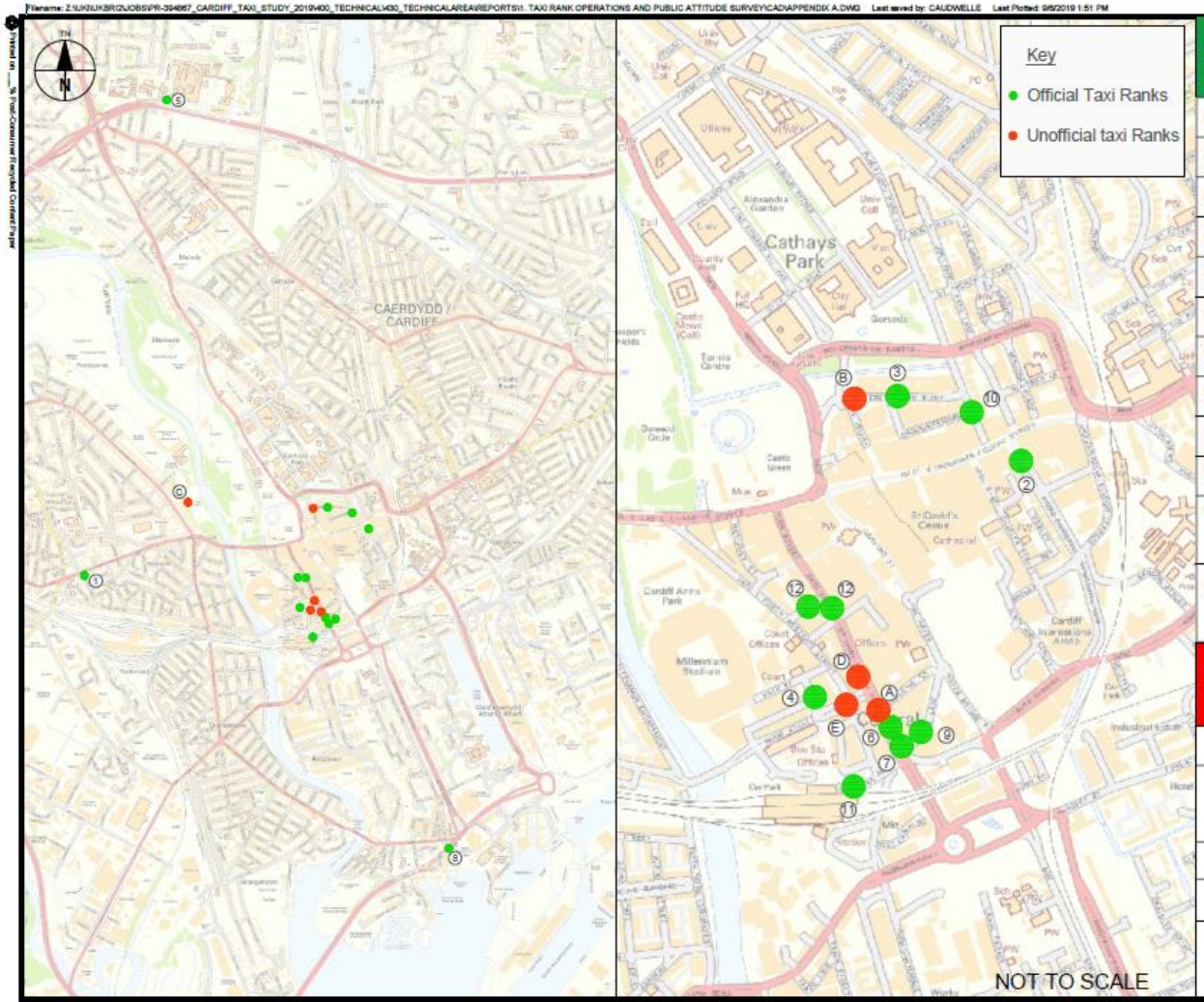
8.1.16 A Taxi Market Condition Assessment Matrix has been determined to account for both passenger delays and taxi delays. This matrix was applied to each rank during each time interval for each day. These graphs determined using the matrix show rare 5-10 minute occasions where the status of the rank is deemed to have unmet demand; Saunders Road during the Sunday night period being the only exception. 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 2016 data and the 2019 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 whereas the taxi supply has remained consistent. Average passenger delay times have been compared and are unchanged from 2016.

8.1.19 The Taxi Market Condition Assessment Matrix applied to both 2016 and 2019 shows little difference in market conditions, particularly when considering Saunders Road 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



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

Location of Unofficial Taxi Ranks	Hours of Operation
(A) St Mary Street (Walkabout)	Informal
(B) Greyfriars Road (Unofficial)	Informal
(C) Sophia Gardens	Coach Stop
(D) St Mary Street (O'Neill's)	Informal
(E) Wood Street	Informal

Cardiff Taxi Licensing Study 2019

Taxi Rank Locations

Appendix A

AECOM

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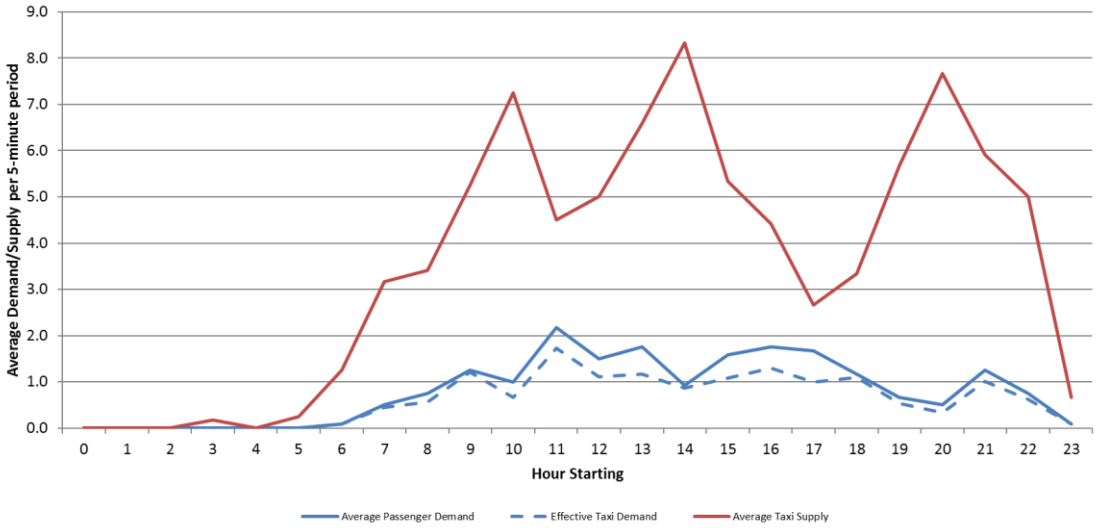
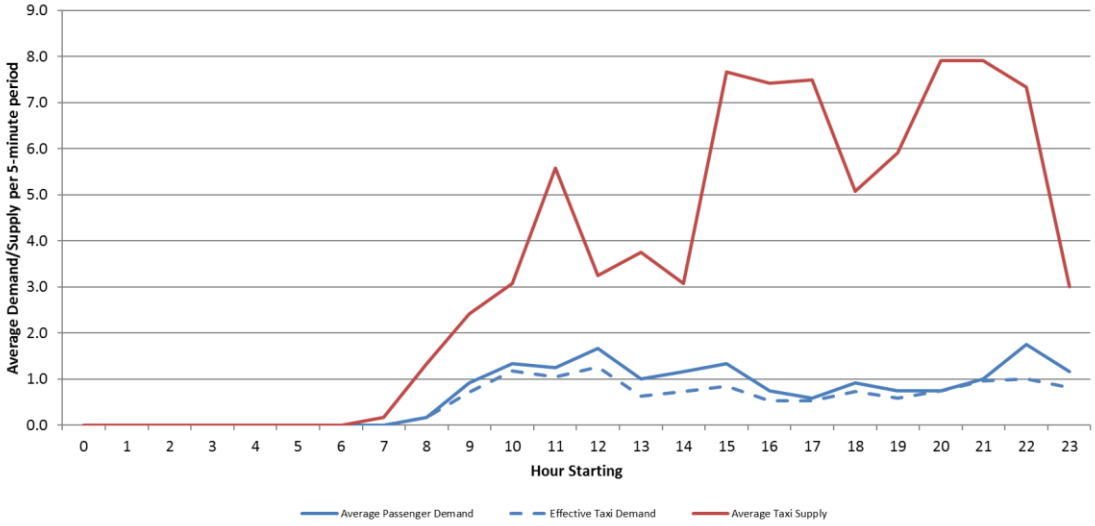
Appendix B:
Comparison of Demand and Supply

Albert Street

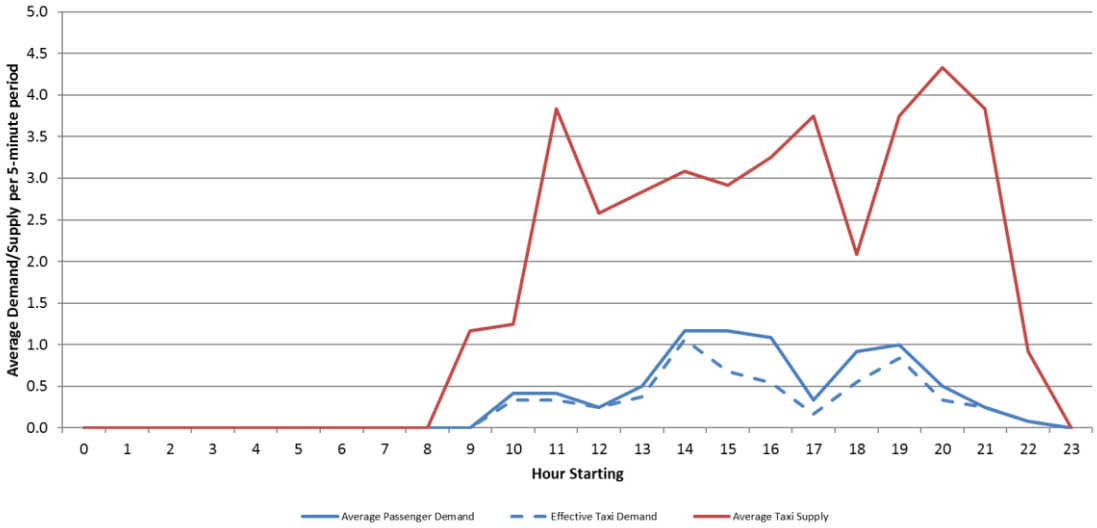
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

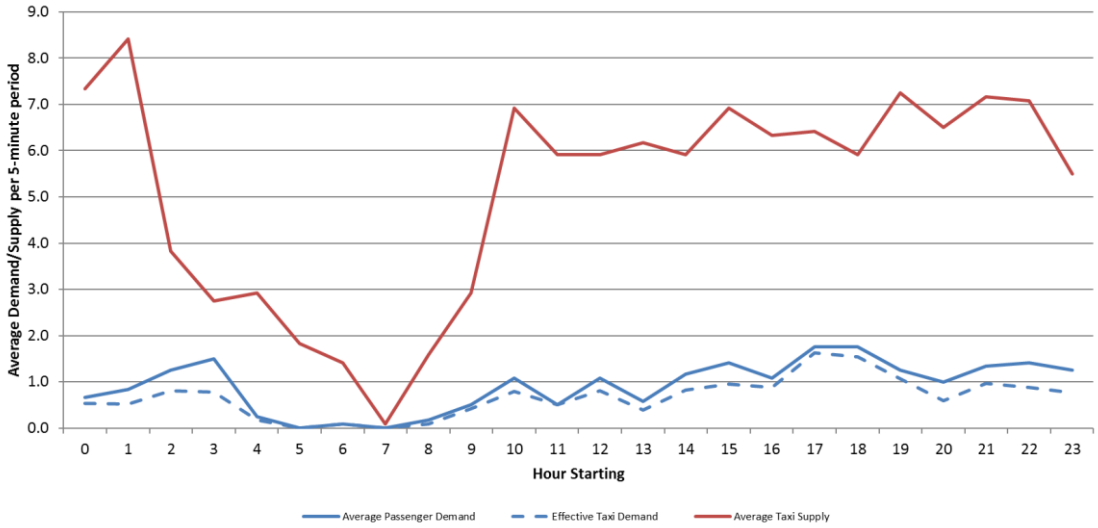


Comparison of Demand and Supply: Sunday



Churchill Way

Comparison of Demand and Supply: Weekday



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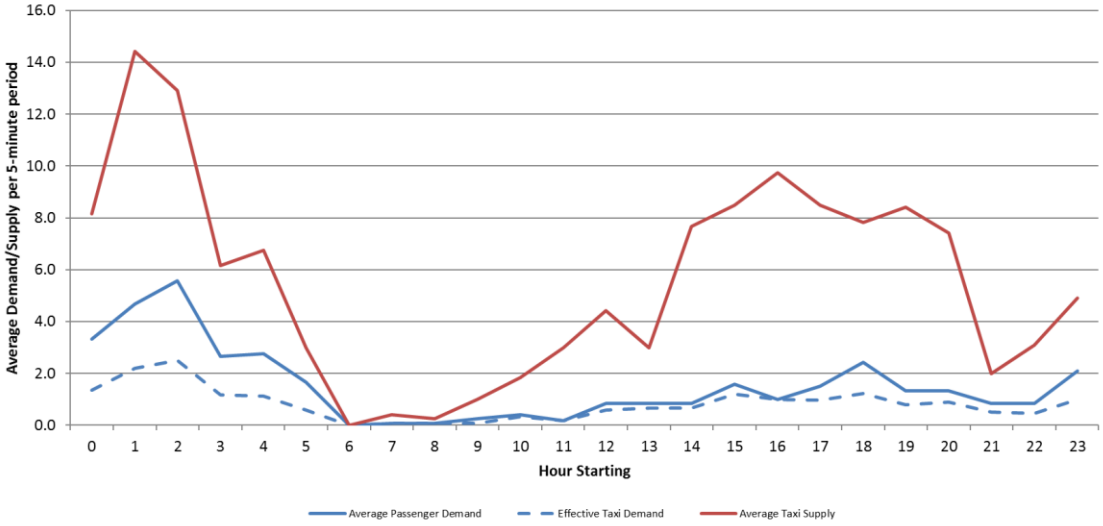
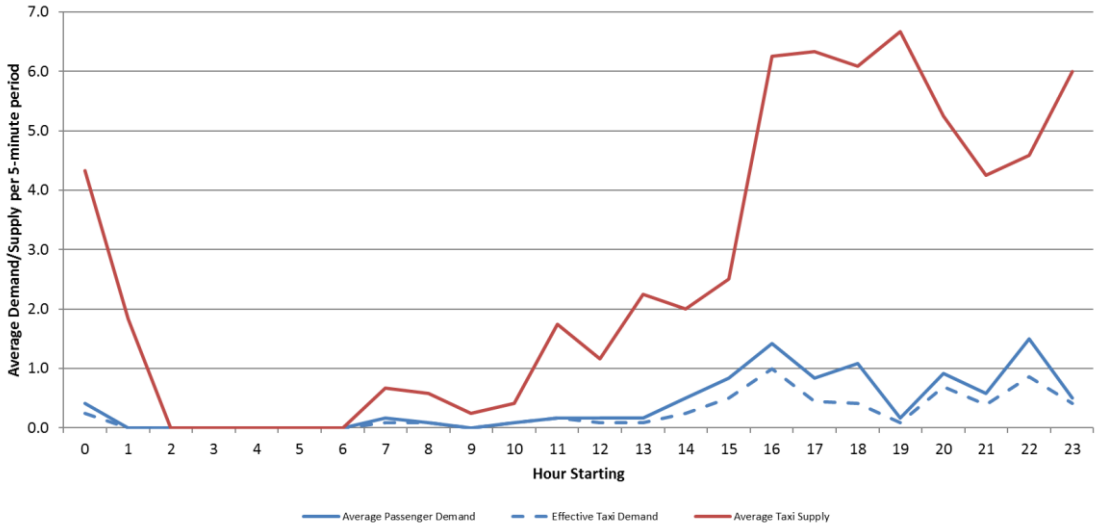
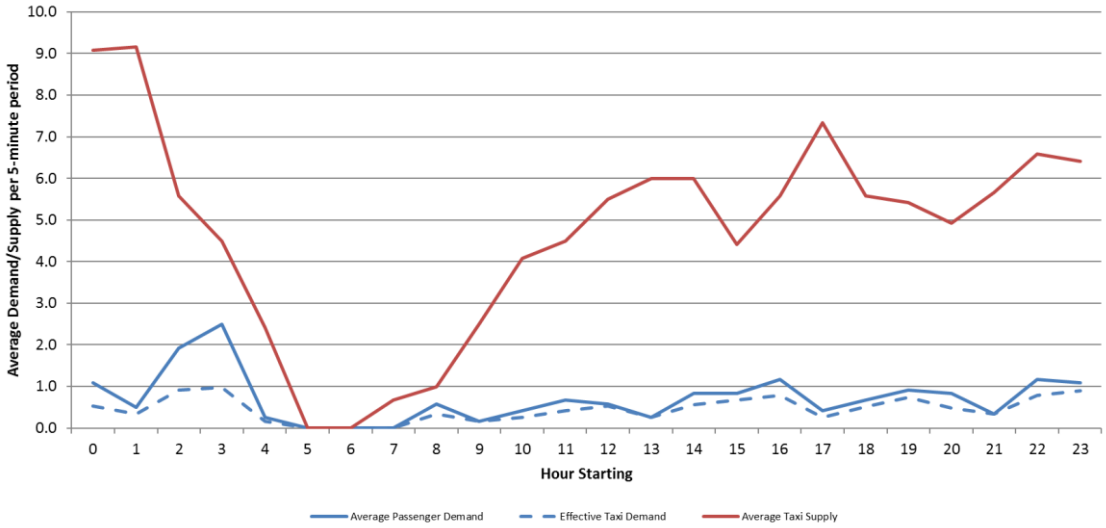


Comparison of Demand and Supply: Sunday



Greyfriars Road

Comparison of Demand and Supply: Weekday



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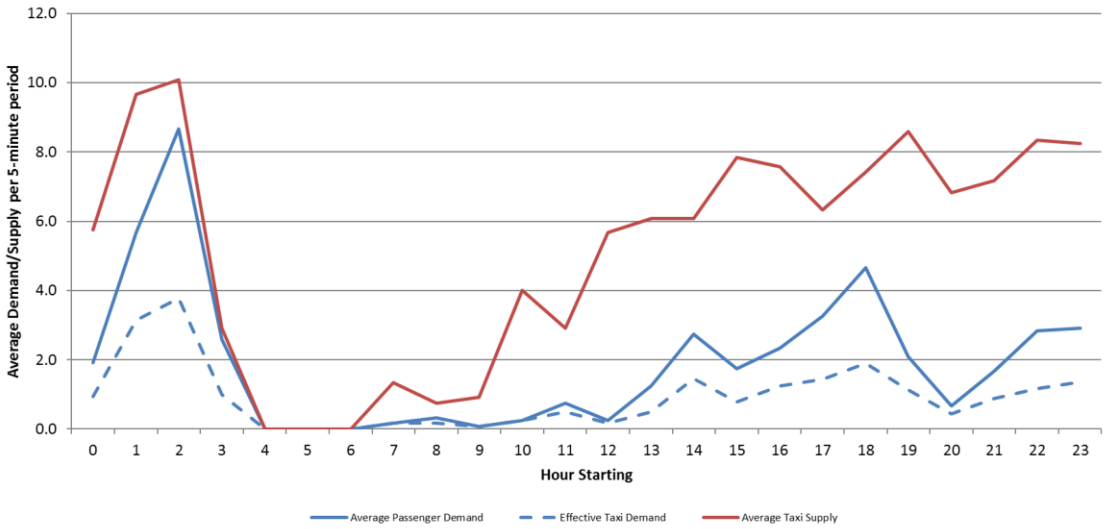
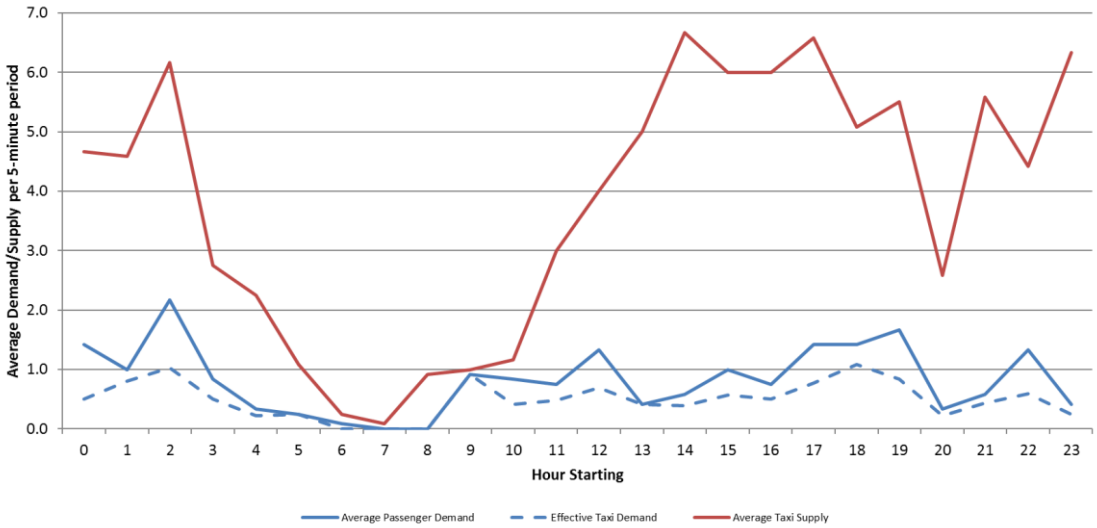
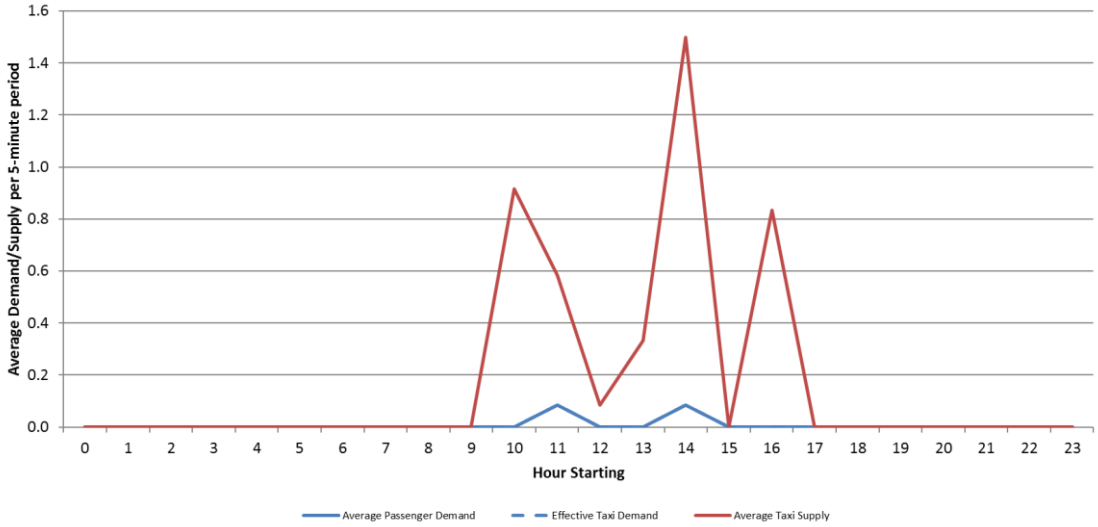


Comparison of Demand and Supply: Sunday

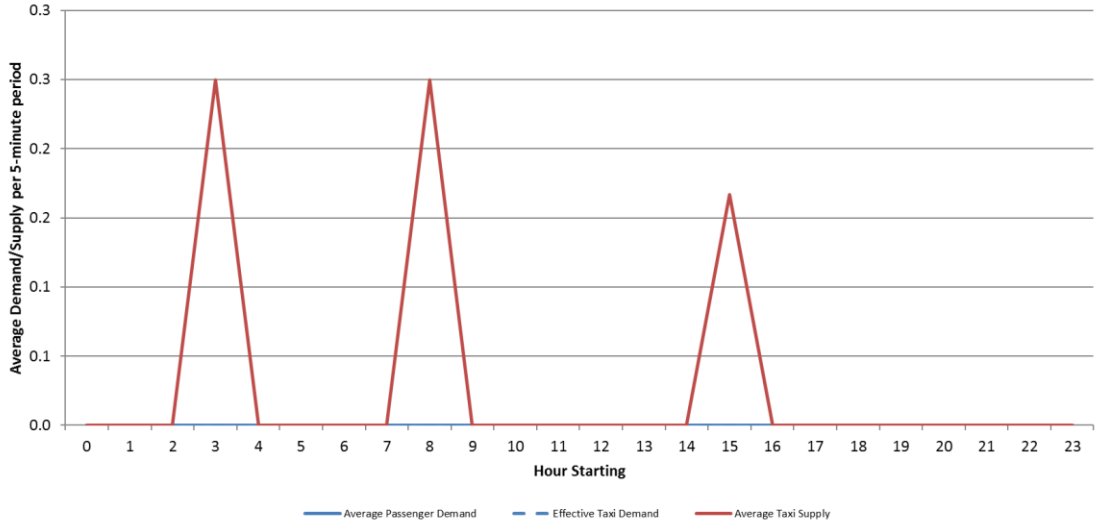


Havelock Street

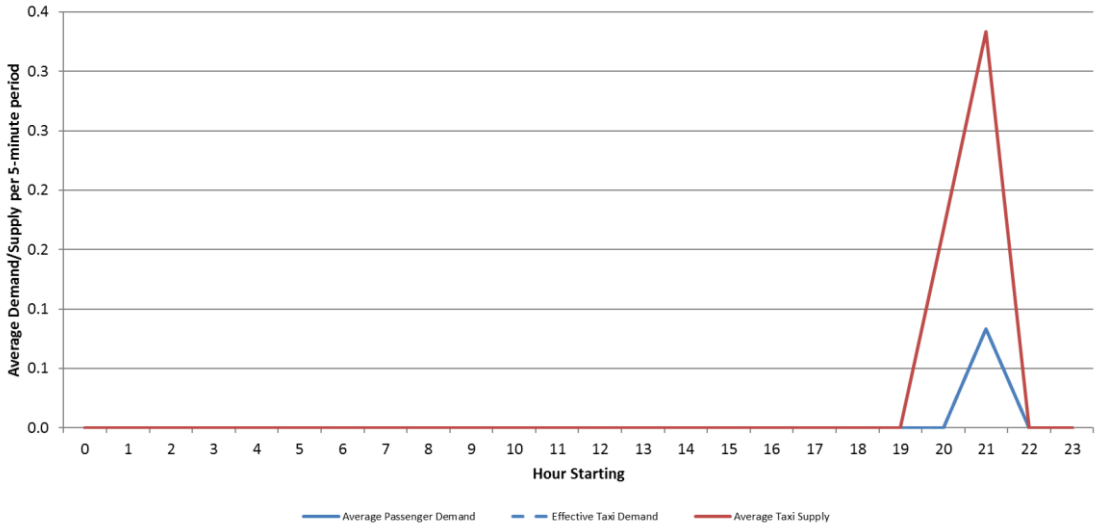
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

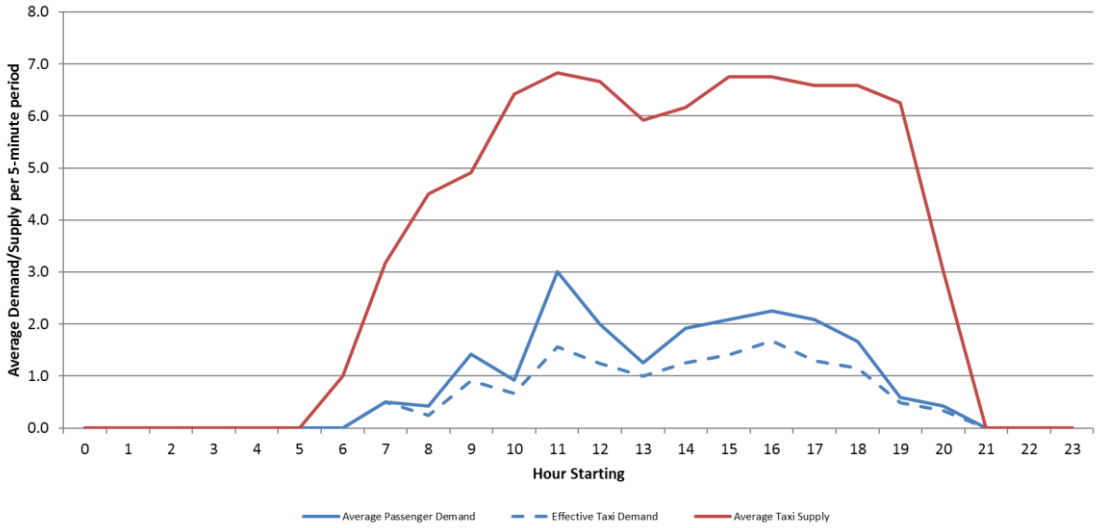


Comparison of Demand and Supply: Sunday

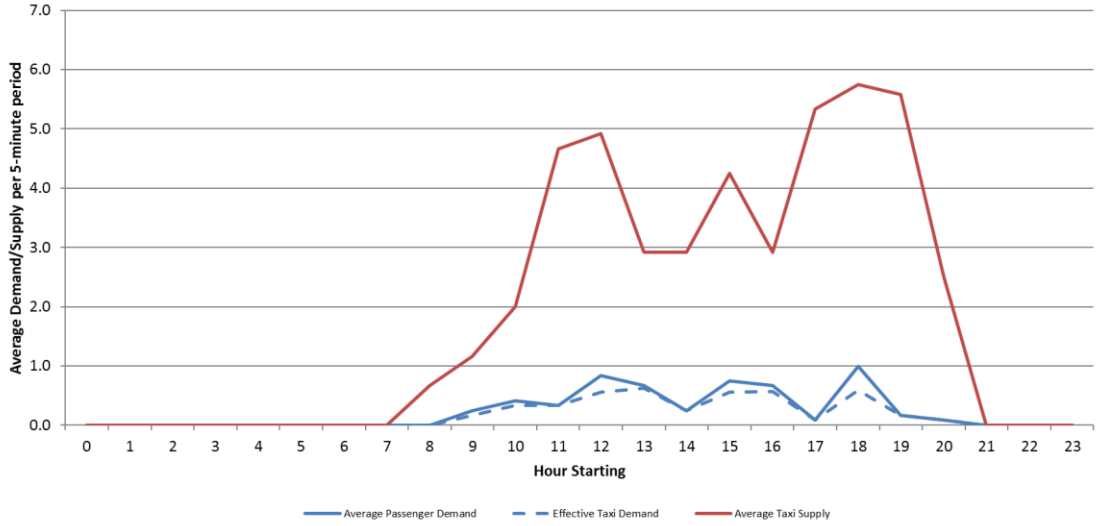


Heath Hospital

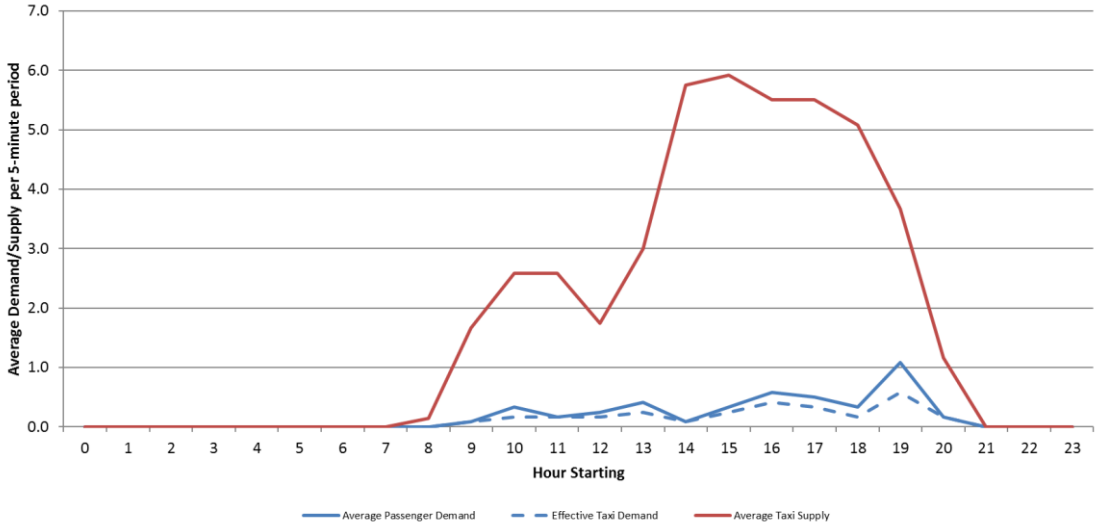
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekday

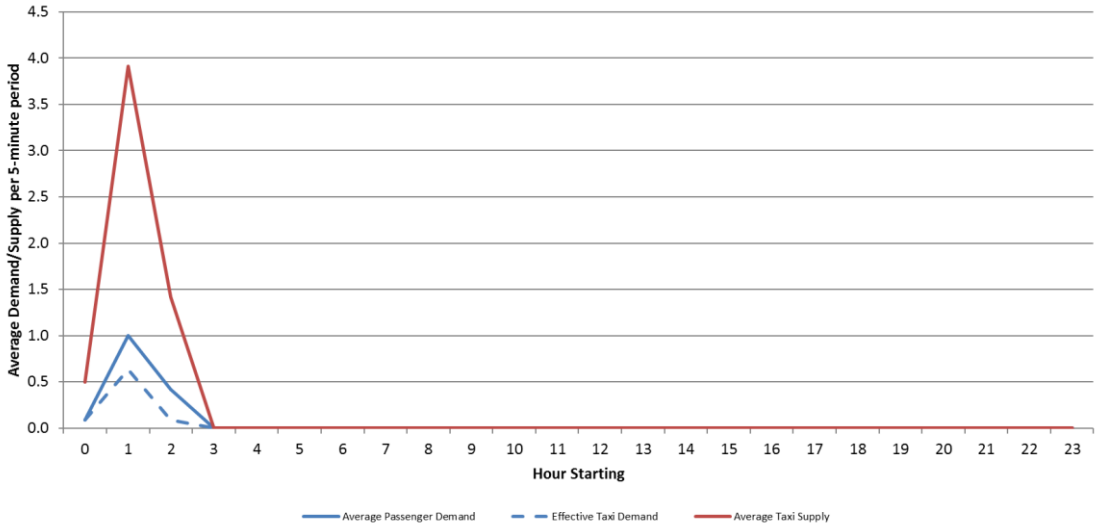


Comparison of Demand and Supply: Sunday

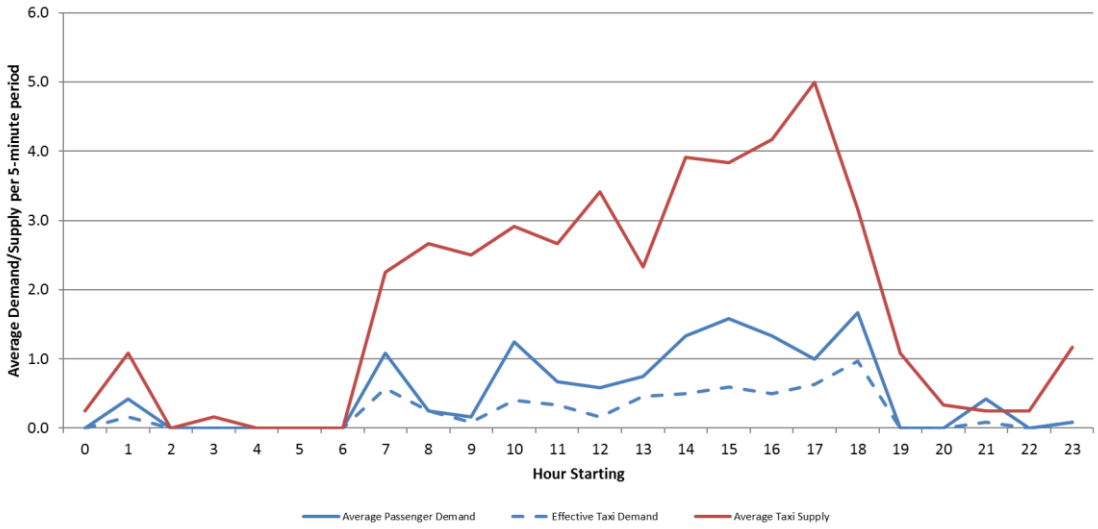


Lower St Mary Street (East)

Comparison of Demand and Supply: Weekday

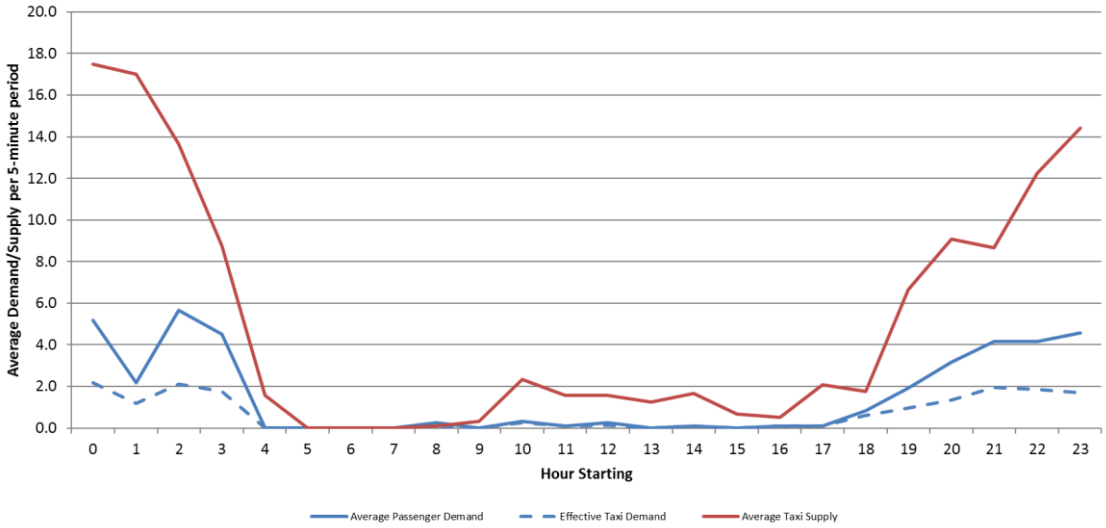


Comparison of Demand and Supply: Sunday

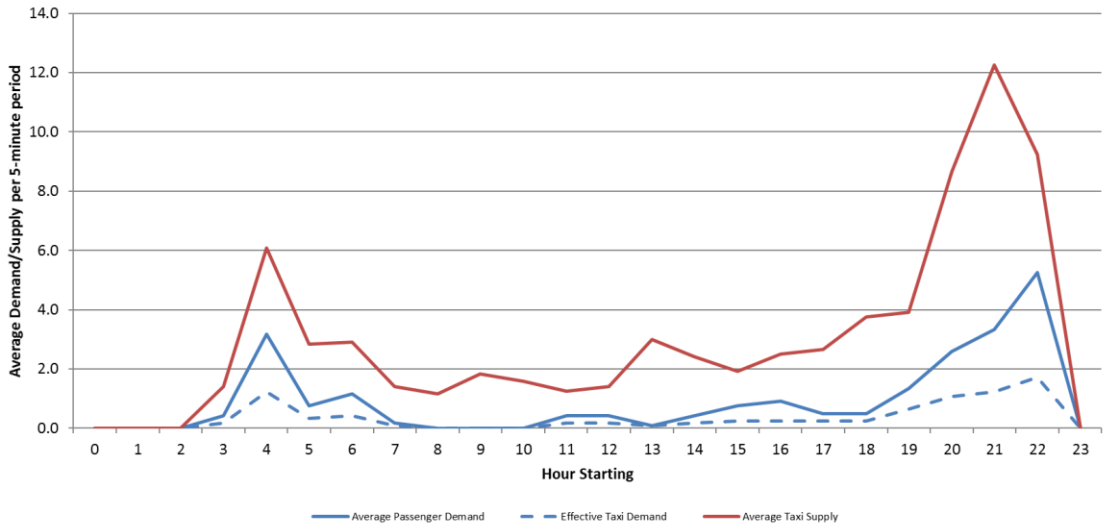


Lower St Mary Street (West)

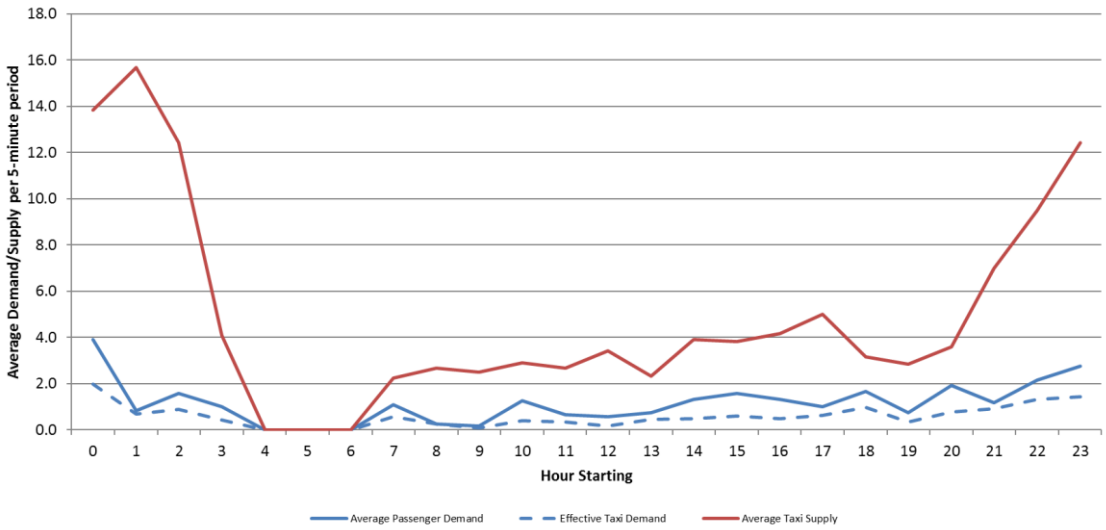
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

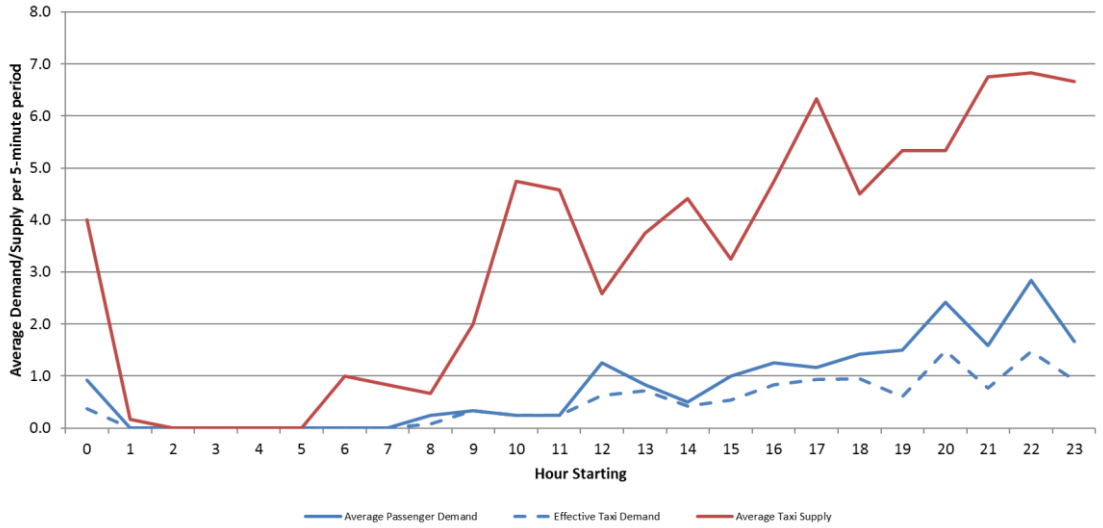


Comparison of Demand and Supply: Sunday



Mermaid Quay

Comparison of Demand and Supply: Weekday



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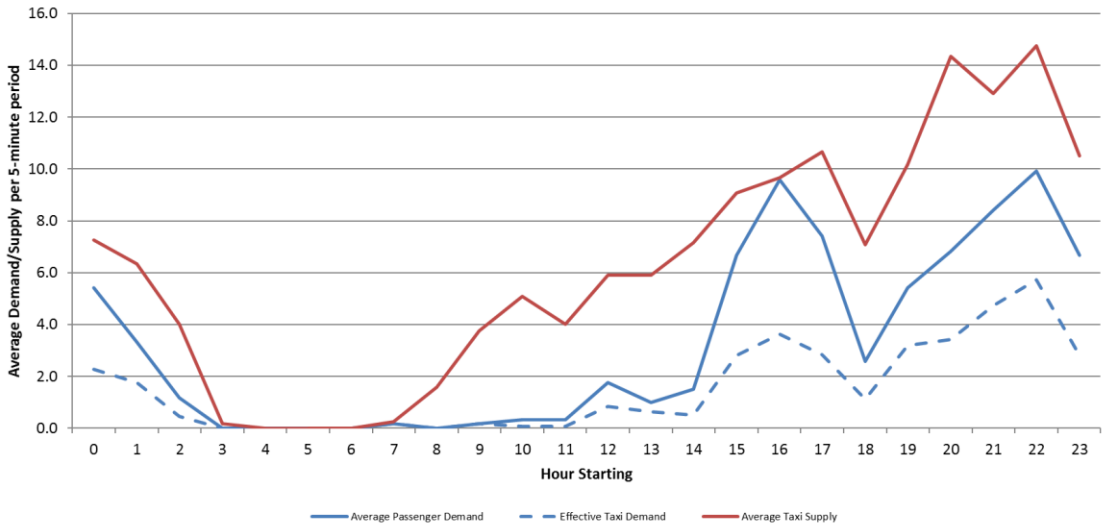
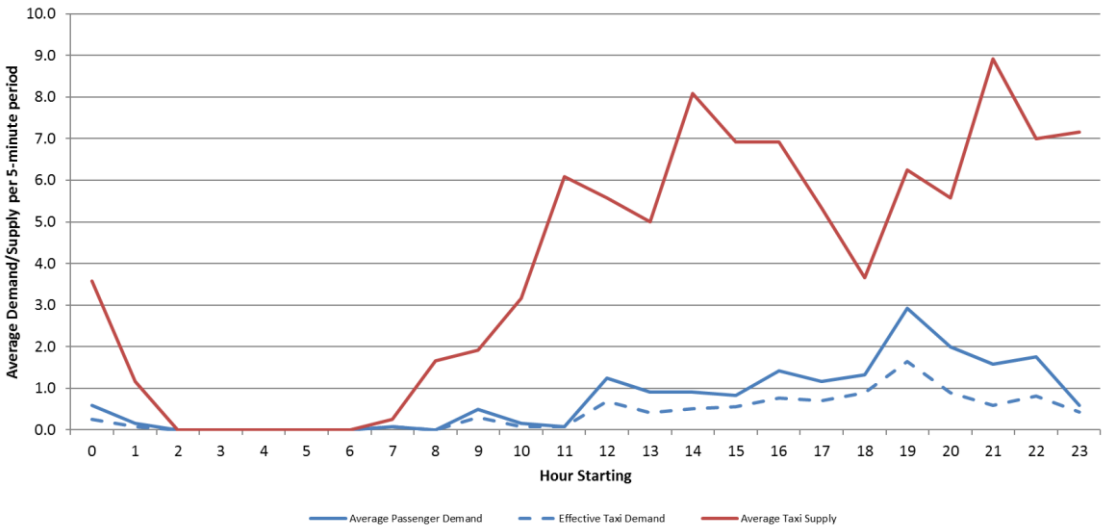
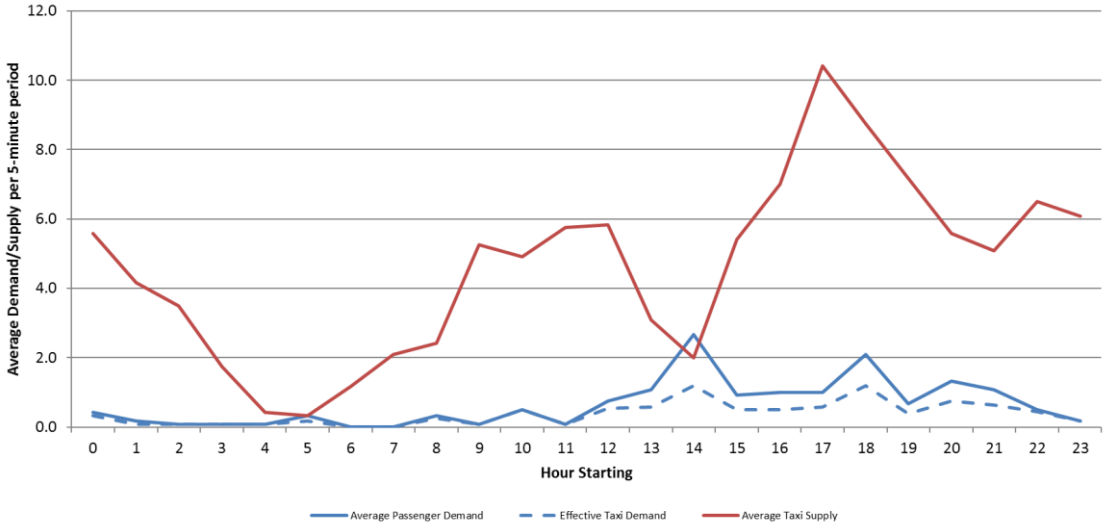


Comparison of Demand and Supply: Sunday



Mill Lane (South)

Comparison of Demand and Supply: Weekday



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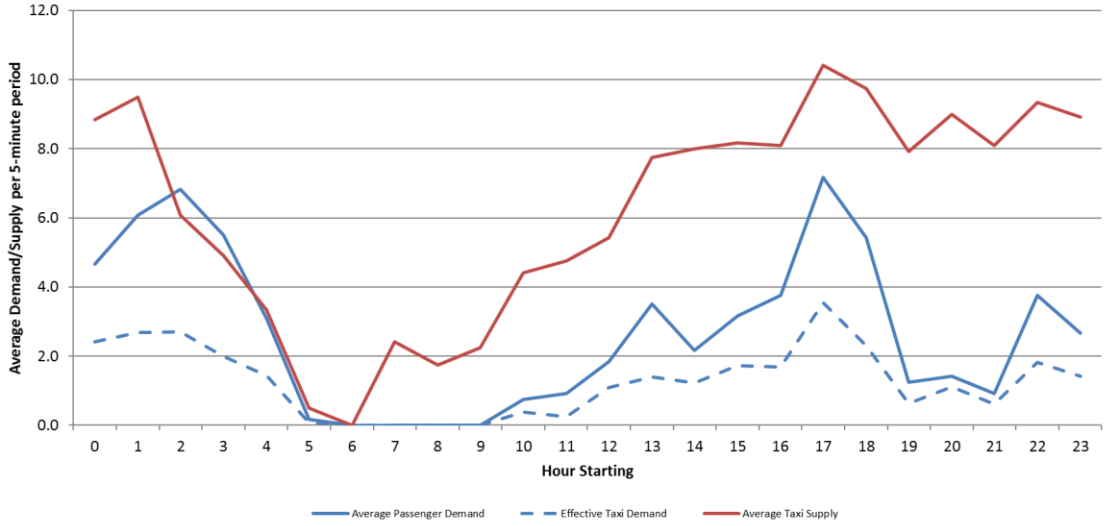
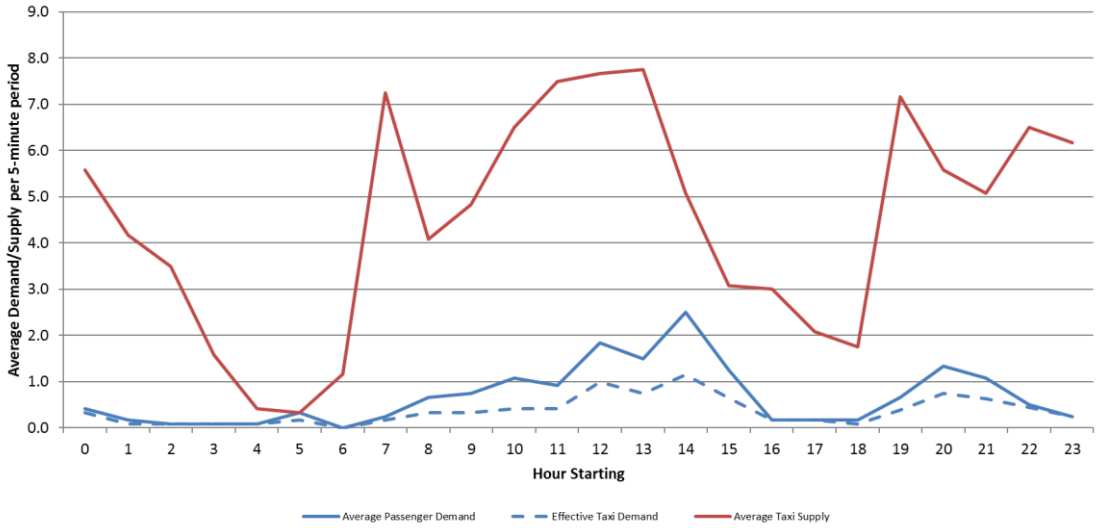
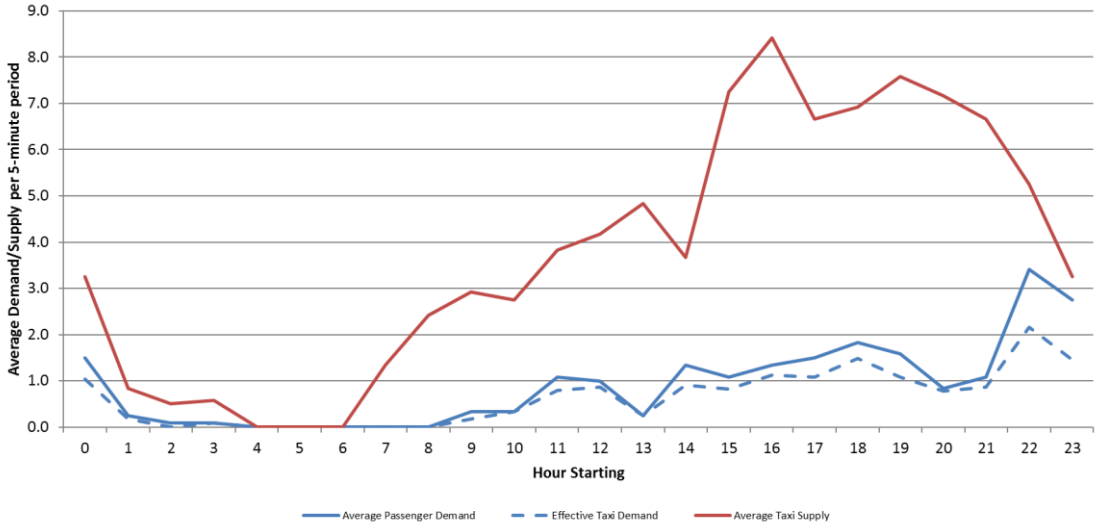


Comparison of Demand and Supply: Sunday

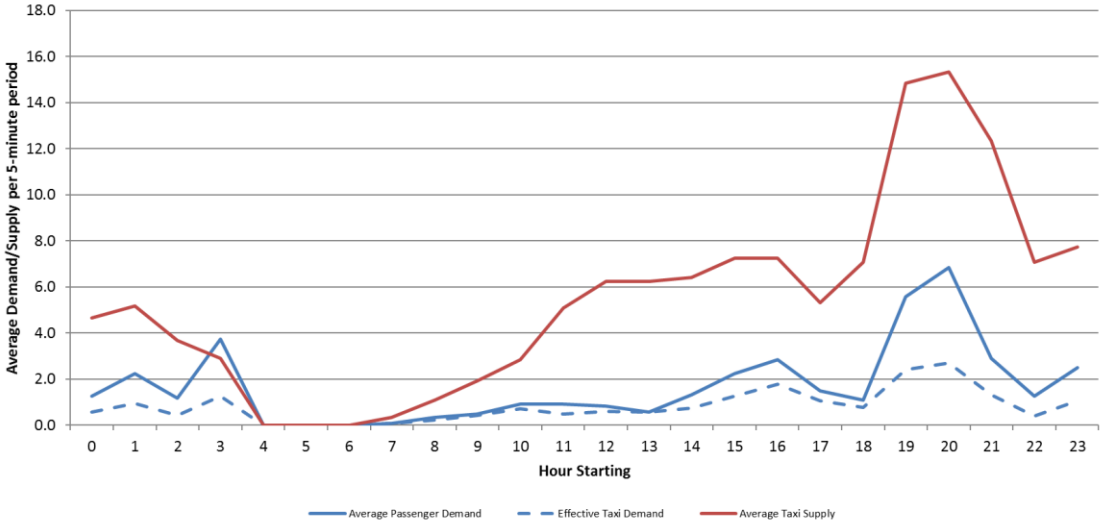


Park Place

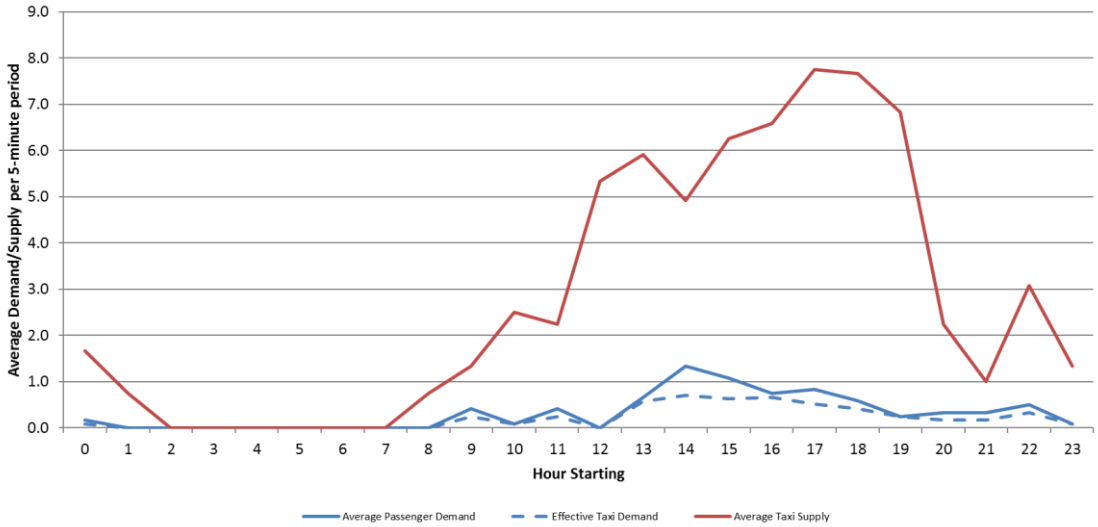
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

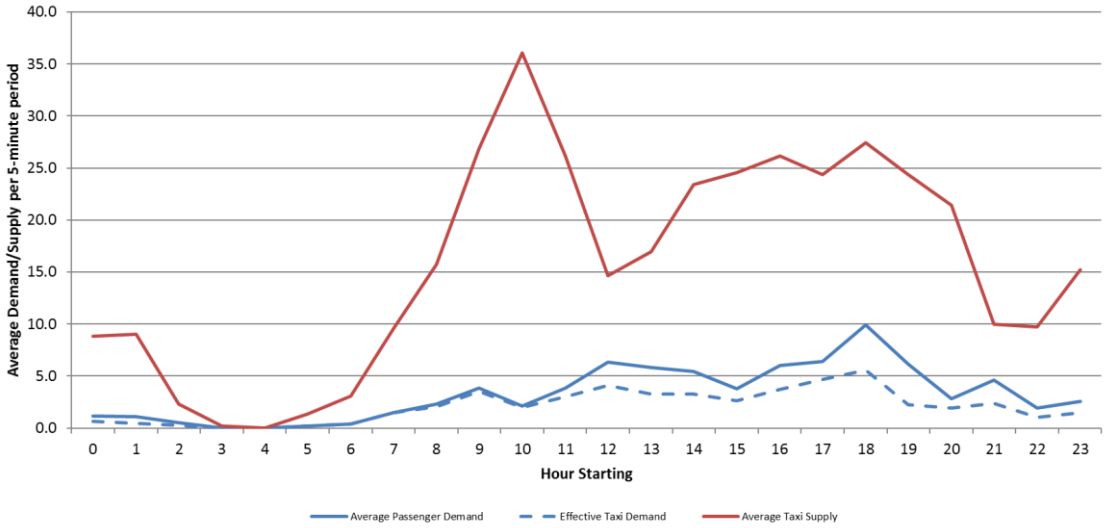


Comparison of Demand and Supply: Sunday

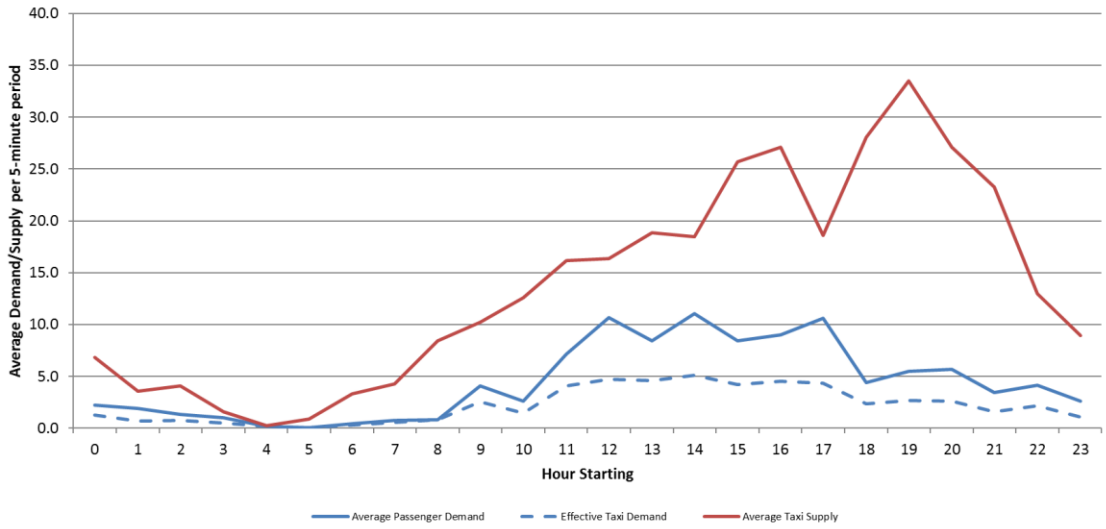


Saunders Road

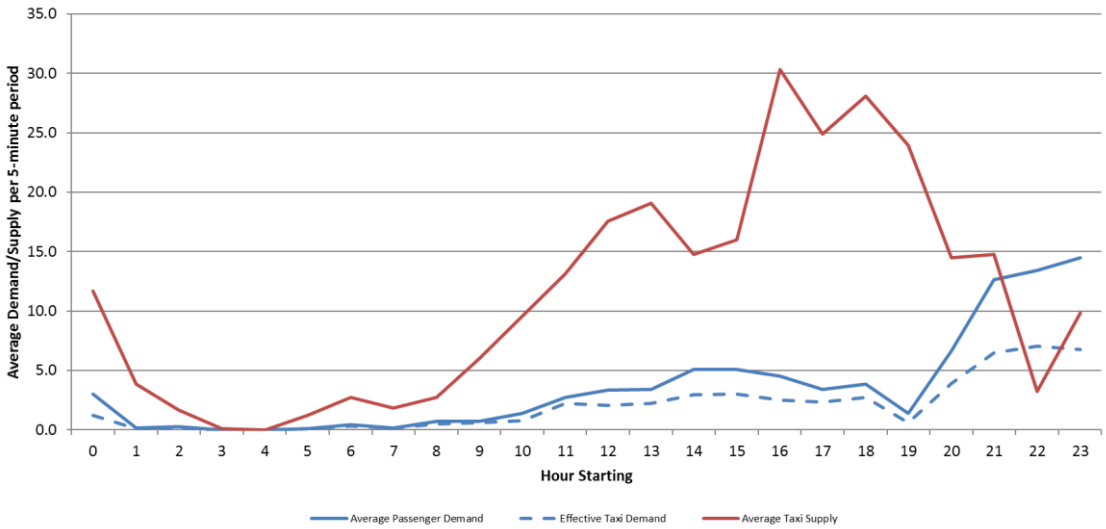
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

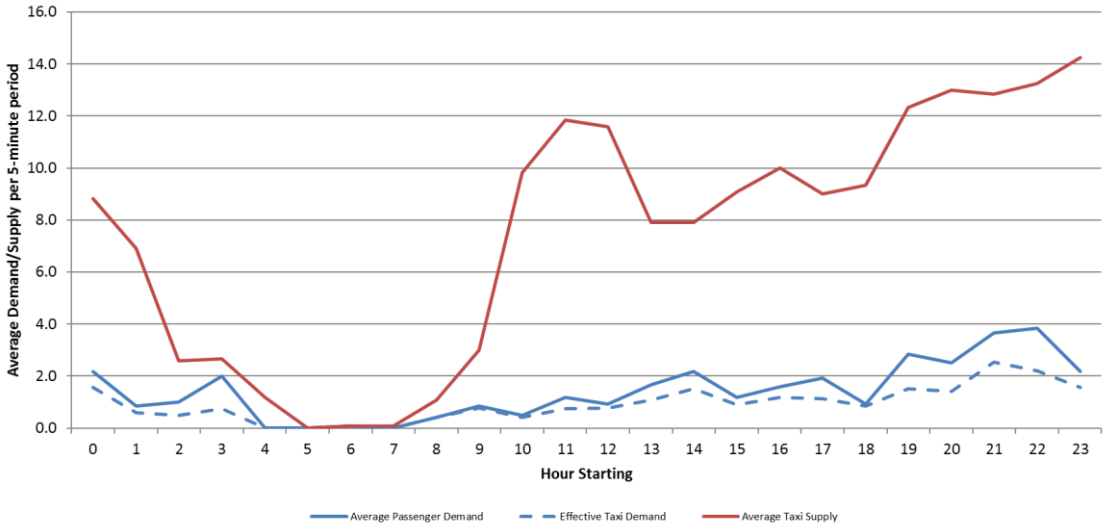


Comparison of Demand and Supply: Sunday



St Mary Street / Guildhall Place

Comparison of Demand and Supply: Weekday



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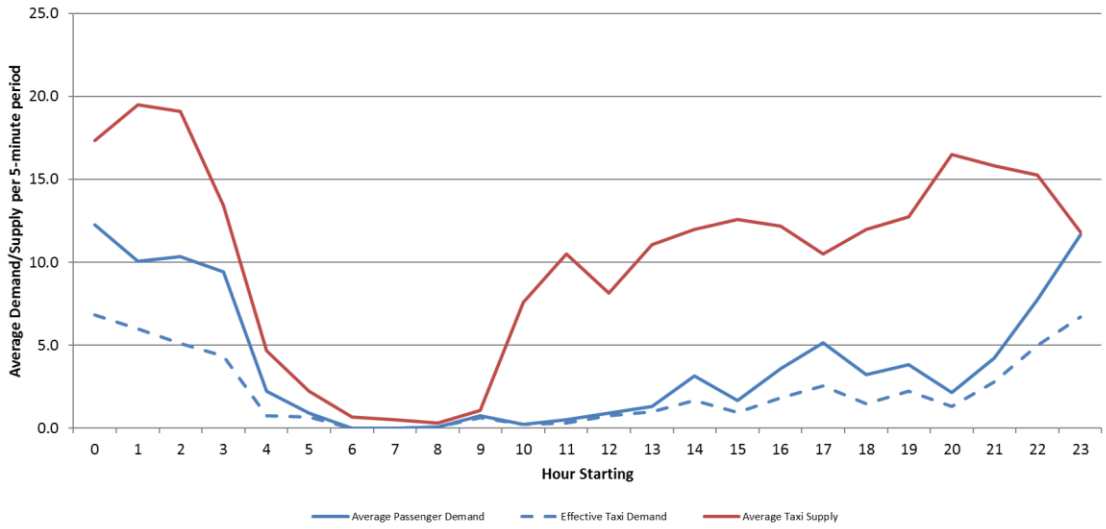
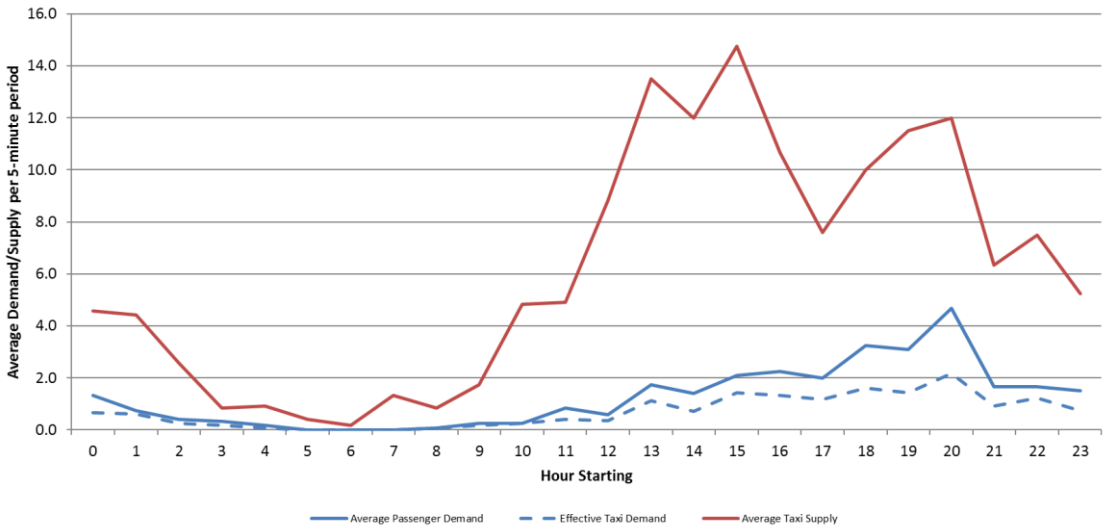
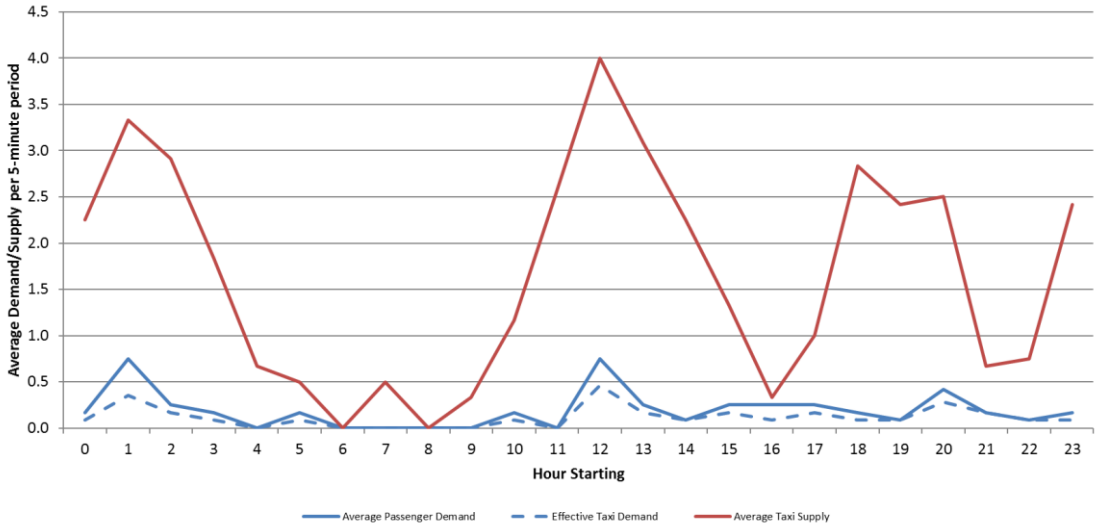


Comparison of Demand and Supply: Sunday

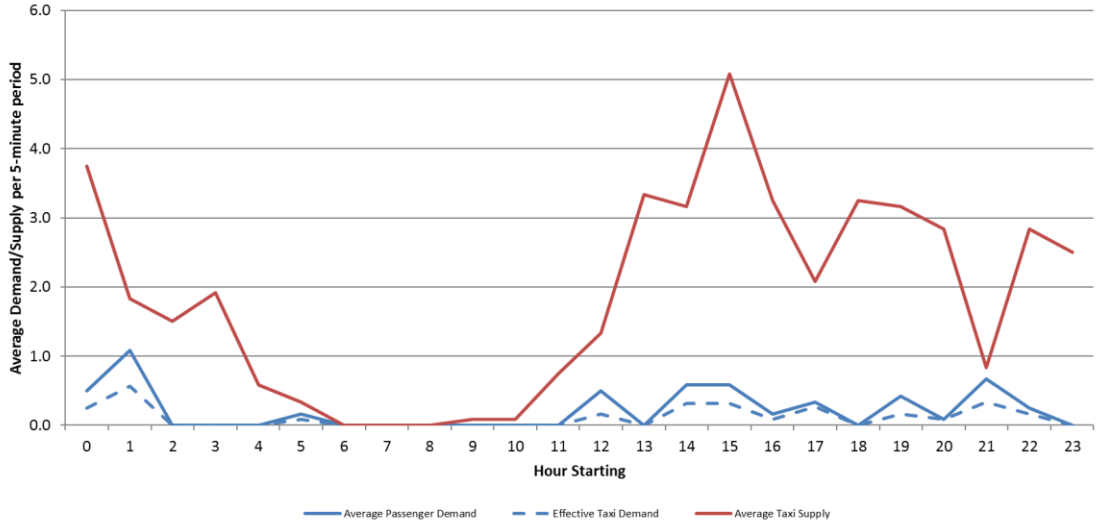


Sophia Gardens

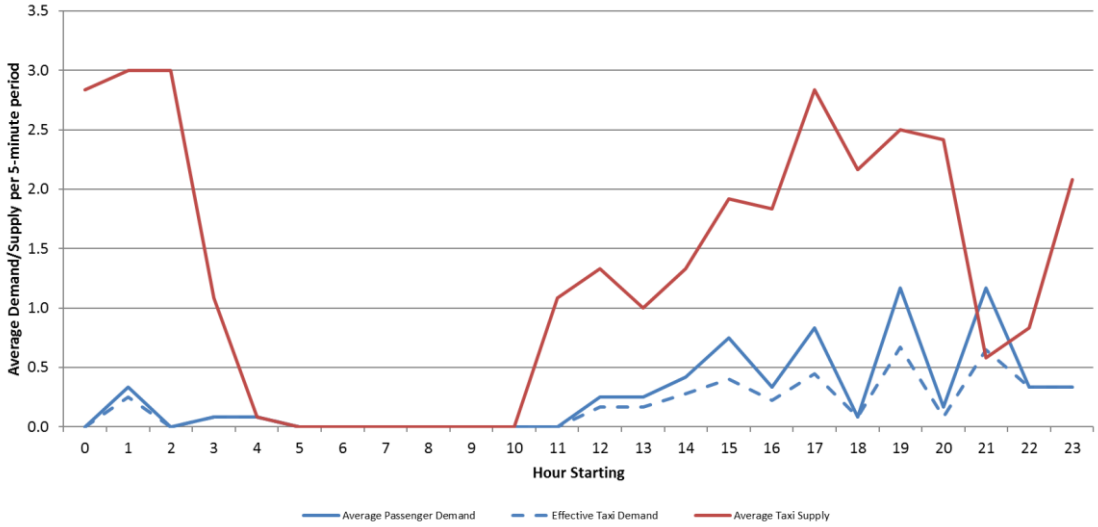
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

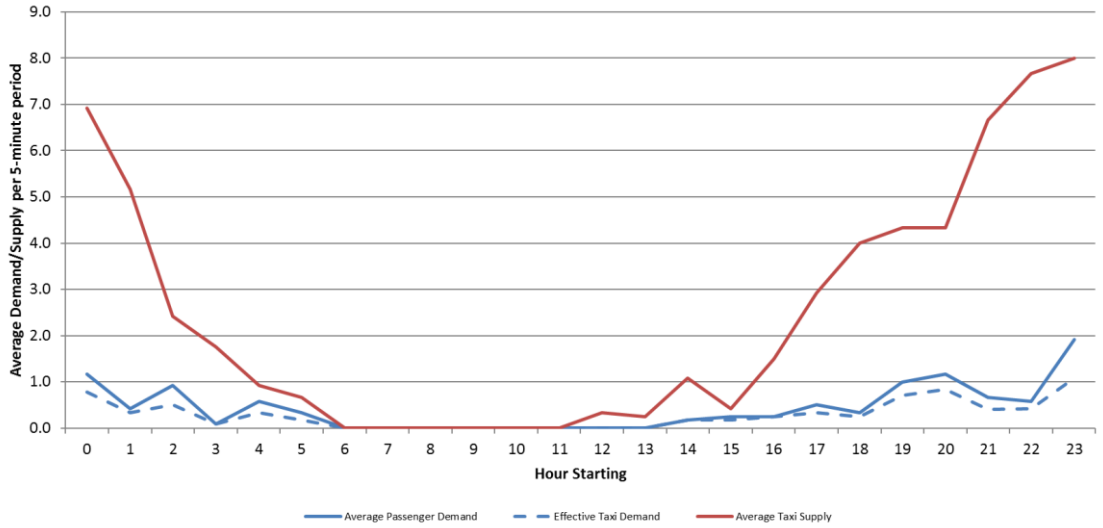


Comparison of Demand and Supply: Sunday

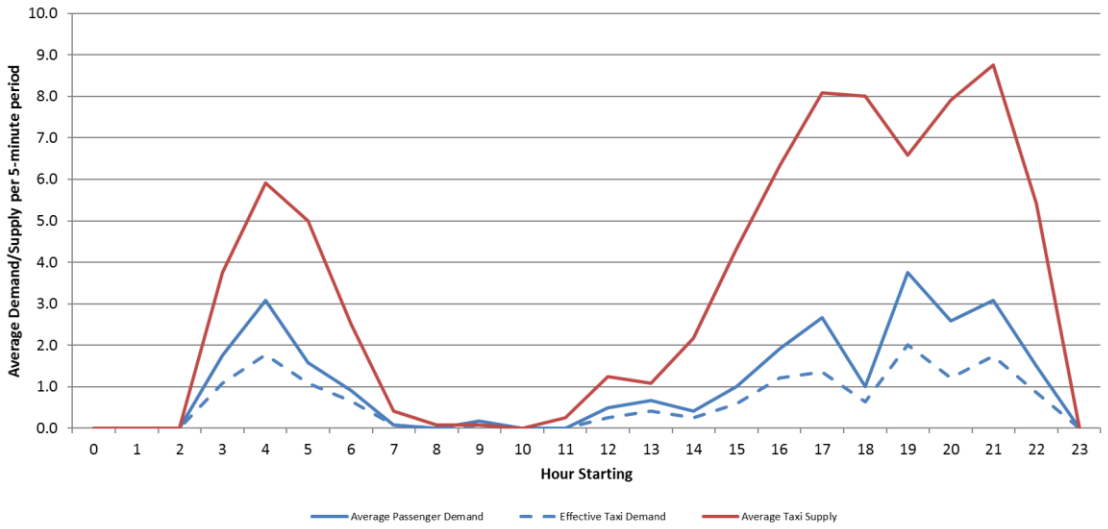


Wood Street

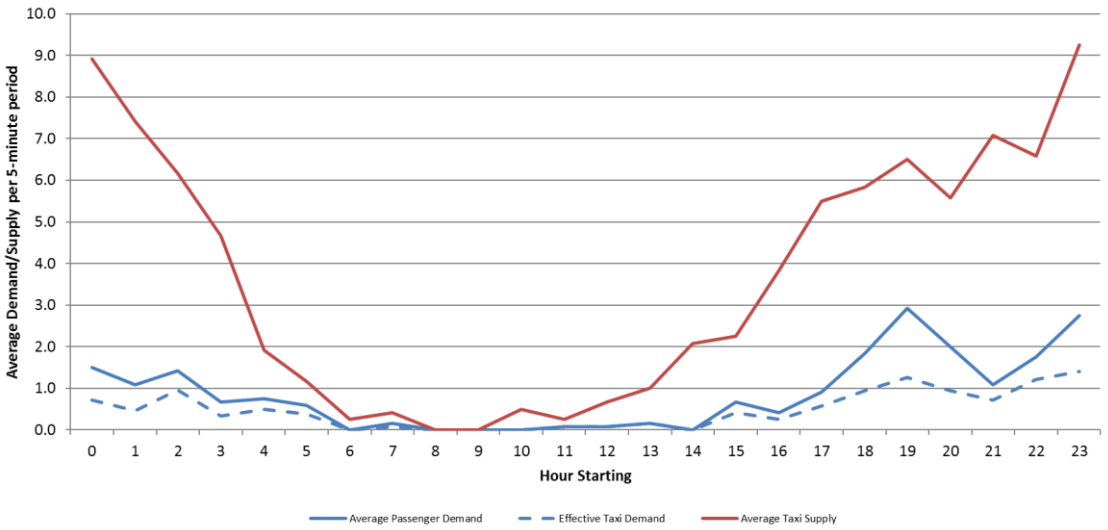
Comparison of Demand and Supply: Weekday



Comparison of Demand and Supply: Weekend

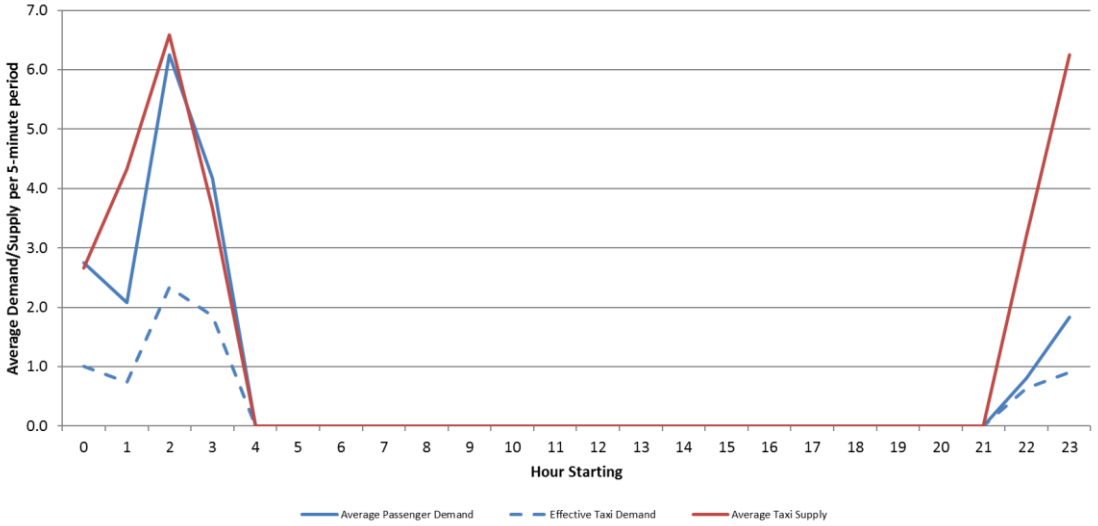


Comparison of Demand and Supply: Sunday



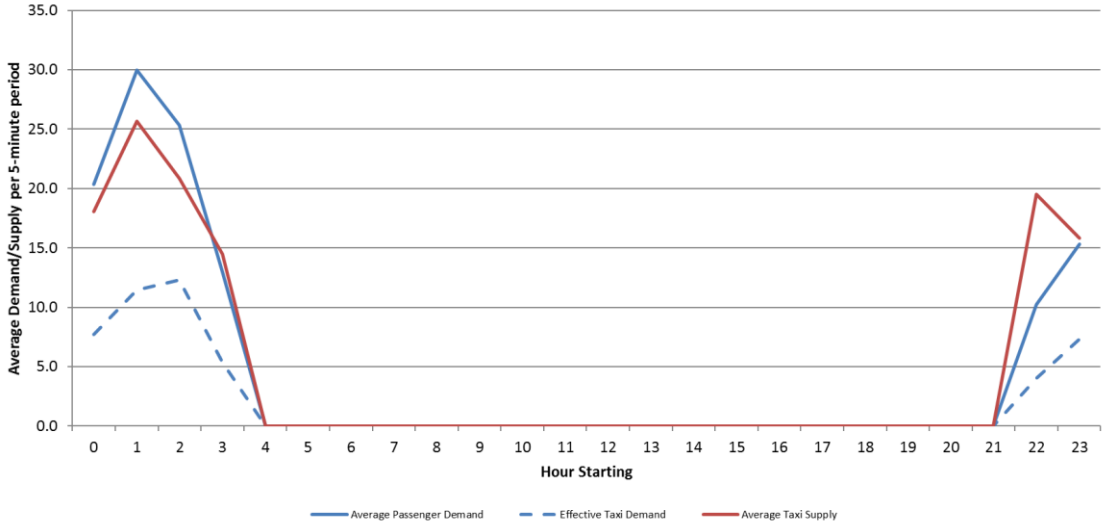
Greyfriars Road (Unofficial)

Comparison of Demand and Supply: Weekend

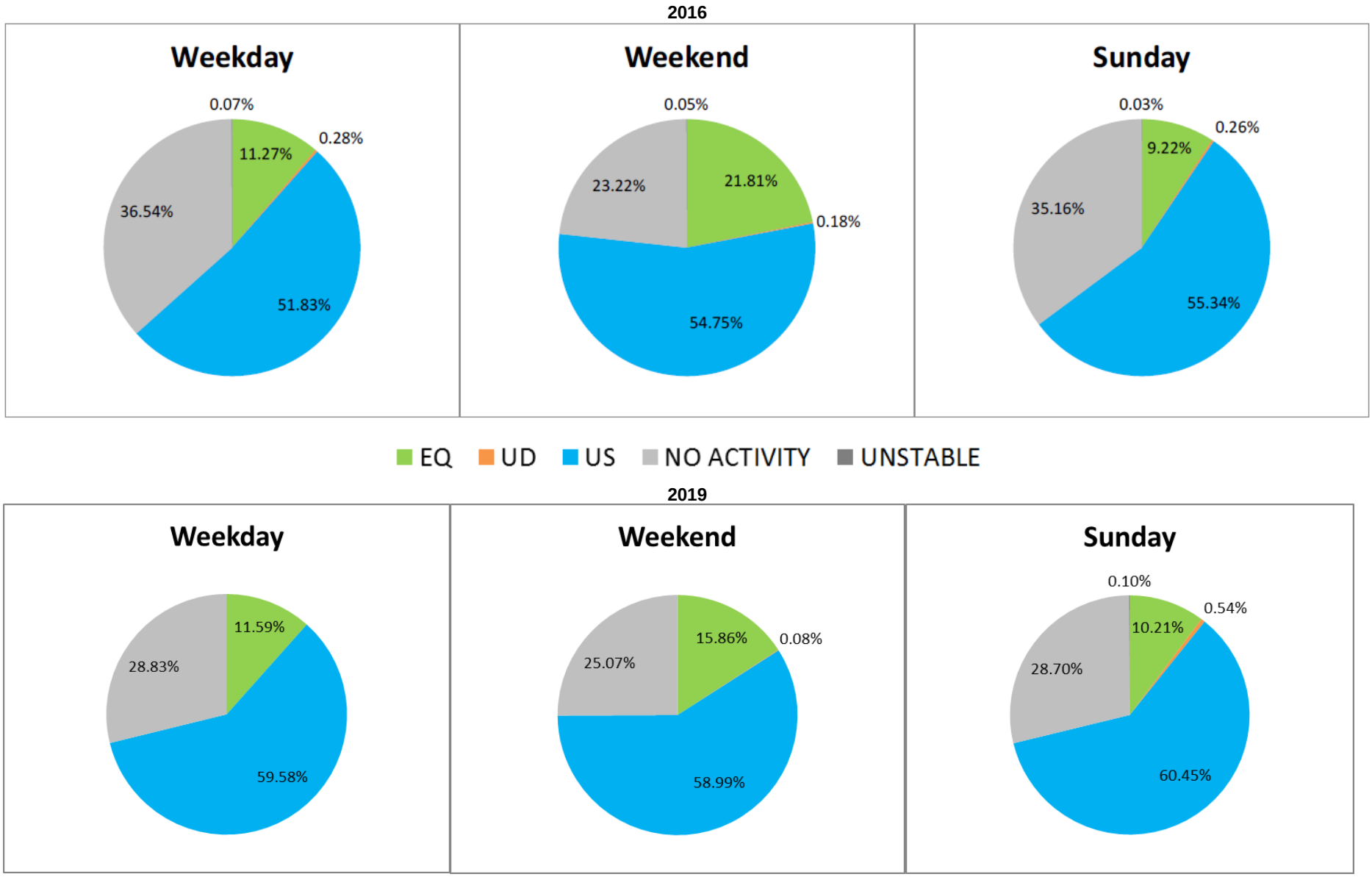


St Mary Street (Walkabout)

Comparison of Demand and Supply: Weekend



Appendix C:
Comparison of Market Conditions 2016 and 2019


2016
Weekday
0.07%
0.28%
11.27%
36.54%
51.83%
Weekend
0.05%
21.81%
23.22%
0.18%
54.75%
Sunday
0.03%
0.26%
9.22%
35.16%
55.34%
EQ
UD
US
NO ACTIVITY
UNSTABLE
2019
Weekday
11.59%
28.83%
59.58%
Weekend
15.86%
0.08%
25.07%
58.99%
Sunday
0.10%
0.54%
10.21%
28.70%
60.45%

AECOM Imagine it. Delivered.

Cardiff Taxi Licensing Study 2019

Part 2: Driver and Proprietor Attitude Survey

Cardiff Council

30 September 2019

Prepared by: Alex Jones..... Checked by: Neil Rogers.....

Verified by: Ellena Caudwell..... Approved by: James Gait.....

Cardiff Taxi Licensing Study 2019: Part 2: Driver and Proprietor Attitude Survey

Rev No	Comments	Checked by	Approved by	Date
1	Draft V1	NR	JG	05/09/2019
2	Final Issued V1	NR	JG	27/09/2019

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Job No 60600820 Cardiff Taxi Study 2019 Date Created September 2019

Table of Contents

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 studies that took place in 2013 and 2016.

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 2019: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2019: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2019: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2019: 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 average number of hours worked by taxi and private hire drivers has increased since the 2016 study, with taxi drivers reporting they work more hours than private hire drivers. The weekend night time economy is worked by the majority of taxi drivers, whereas private hire vehicle drivers are more likely to work on a weekday daytime.

E.8 Most drivers who responded own their vehicle, and the majority of proprietors drive their vehicle, so there is likely to be an overlap of opinions.

E.9 The average wait time for a fare is usually more than 15 minutes for every day type, with the shortest average wait time for taxi drivers reported on a weekend night time.

E.10 Most drivers and proprietors reported feeing there are too many taxis and private hire vehicles in Cardiff, and more respondents felt the cap should be kept the same rather than removed or increased.

E.11 The most common improvement suggestion was to reduce or stop cross-bordering, with a view to improve standards and improve availability of work.

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 studies that took place in 2013 and 2016.

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.

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] 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, 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 an online survey during May and June 2019. The survey was sent out to all licensed drivers and proprietors registered by Cardiff Council in the form of a covering letter explaining the purpose of the study with simple weblinks included where they could access the survey: cardifftaxisurvey.co.uk/driver and cardifftaxisurvey.co.uk/proprietor. The questionnaires and covering letters were prepared by AECOM, and distributed by Cardiff Council to ensure personal details were not passed to AECOM. The data collection process was completed in compliance with the GDPR. All questionnaires received were treated as confidential and have no means of identifying the respondent. Copies of the questionnaires can be found in **Appendix A** and **Appendix B** respectively.

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 2319 drivers. In total, 214 drivers completed the survey online, within the deadline. Two drivers requested a paper version of the questionnaire and returned these using a freepost envelope. A total of 216 drivers completed the survey which is a 9.3% response rate, compared to 174 drivers (8.2% response rate) in 2016. Unless stated in the specific section of the report, the number of responses means most results are indicative only.

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. 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	66	30.6%
Private Hire Vehicle	144	66.7%
Both	6	2.8%
Total	216	100%

2.2.3 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.

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

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 1656 registered proprietors, 78 completed surveys online by the deadline which is a 4.7% response rate, down from 12% in 2016. 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	35	44.9%
Private Hire Vehicle	40	51.3%
Both	3	3.8%
Total	78	100%

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:

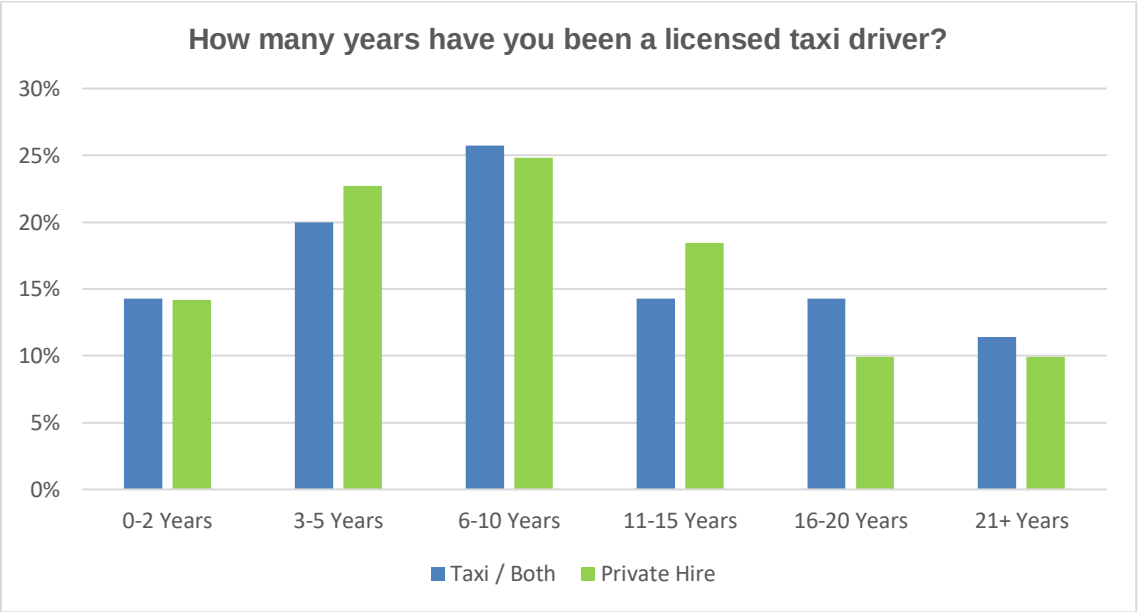
3.2 About You
3.3 About Your Vehicle
3.4 About Your Business

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 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. On average, taxi drivers have been licensed for 11 years and private hire vehicle drivers for 10 years.

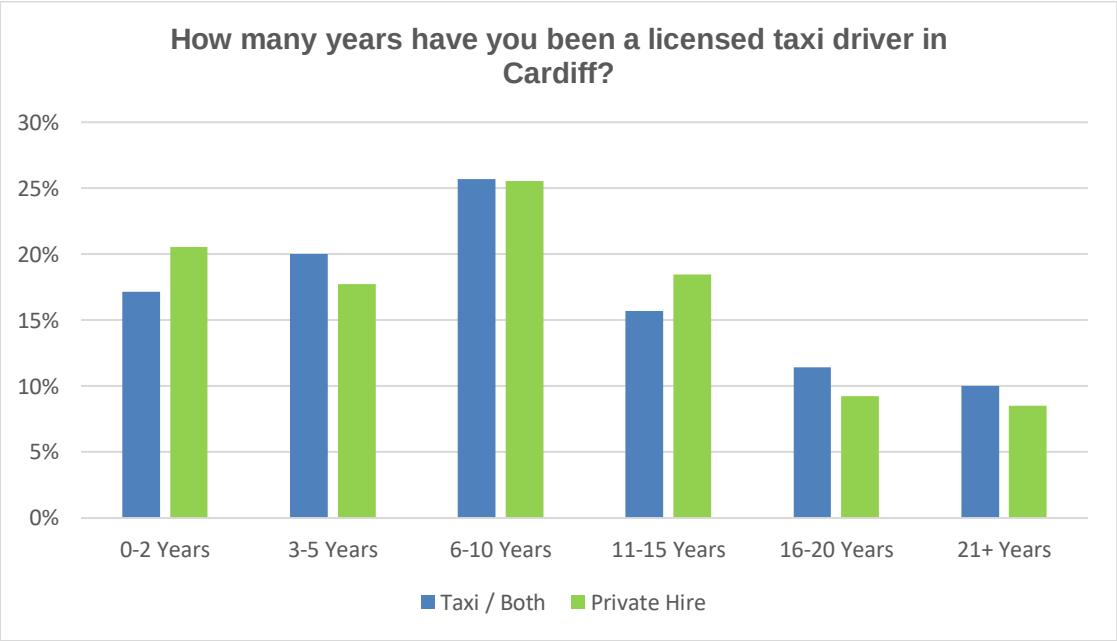
Figure 3.1 - Length of Service



Base: 211 (5 respondents did not respond)

3.2.2 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. On average, taxi drivers have been licensed in Cardiff for 10 years and private hire vehicle drivers for 9 years.

Figure 3.2 - Length of Service in Cardiff



Base: 211 (5 respondents did not respond)

3.2.3 Table 3.2 shows the formal qualifications of the driver. Eight respondents (0.4%) did not have a BTEC, NVQ or Disability Awareness qualification and these eight respondents did have an "other" qualification.

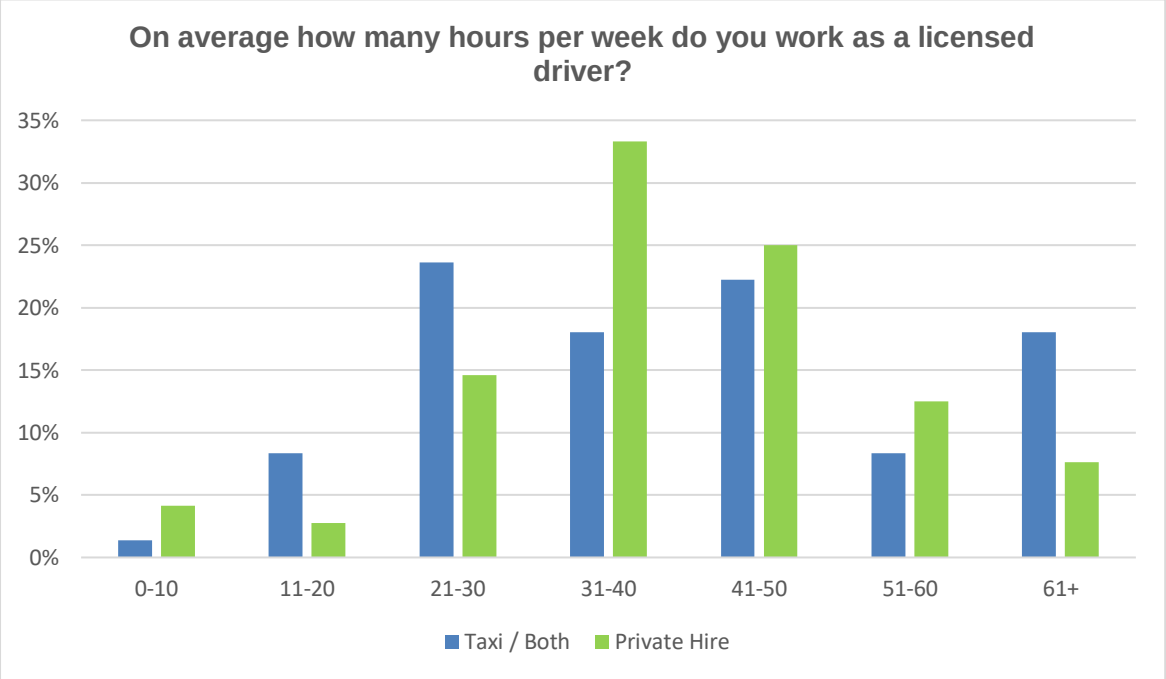
Table 3.2 – Driver Qualifications

	Taxi	PHV
BTEC Level 2	54%	72%
NVQ Level 2	26%	27%
Disability Awareness Training	83%	86%
Other	31%	23%

Base: 216

3.2.4 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. The average number of hours worked by a taxi driver is 45 whilst the average for private hire vehicle drivers is 43. Since 2016 this has increased by 5 hours for taxi drivers and 1.5 hours for private hire vehicles.

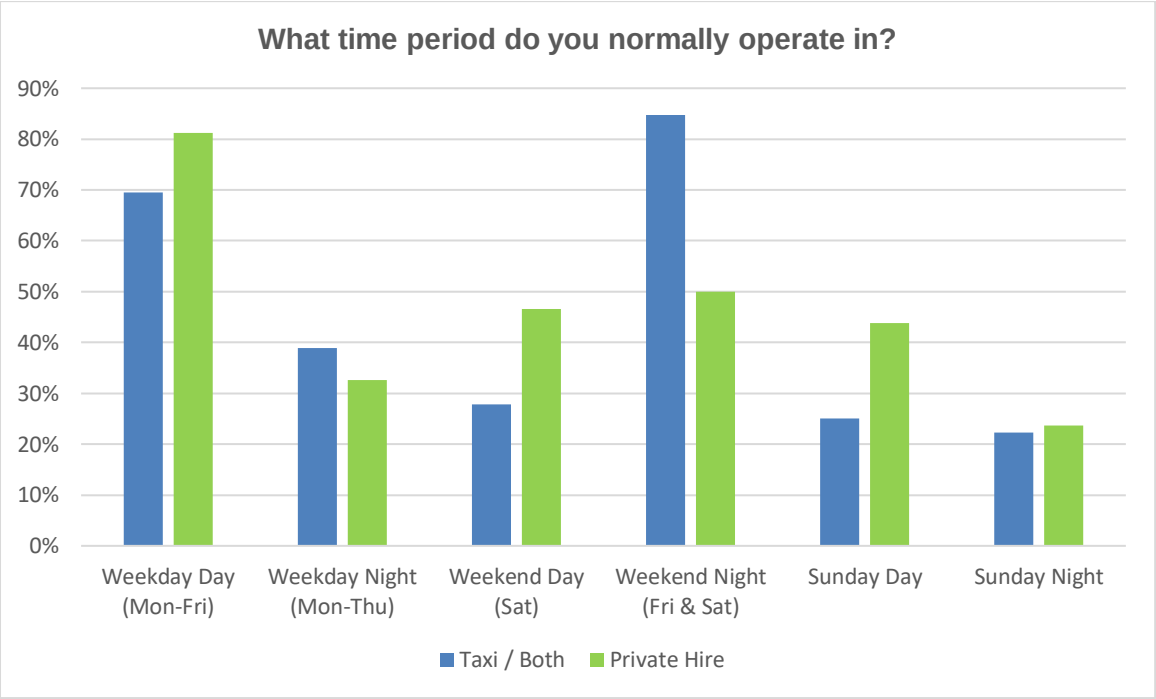
Figure 3.3 – Hours worked in a week



Base: 216

3.2.5 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. Taxi drivers mainly work on weekend nights and during weekdays and private hire vehicle drivers will mainly work on weekdays.

Figure 3.4 – Days normally worked in a week

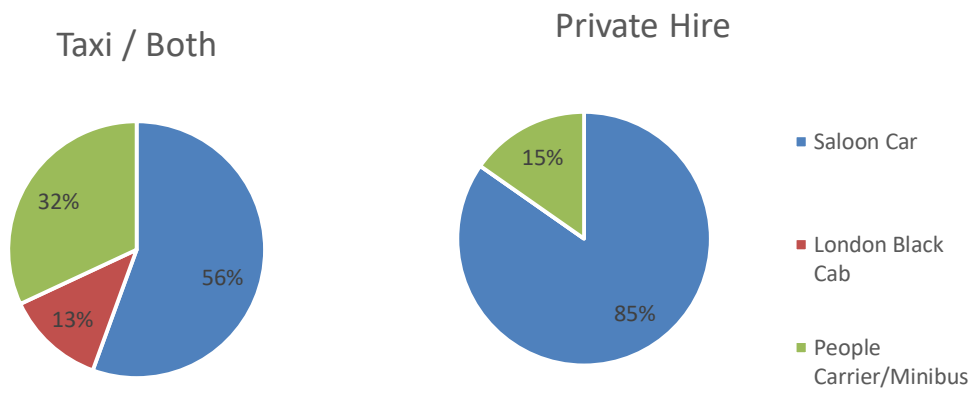


Base: 216

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 with most taxi and private hire drivers using saloon cars.

Figure 3.5 – Vehicle type



3.3.2 Drivers were asked whether their vehicle was wheelchair accessible. The results are in Table 3.3. Very few private hire vehicles are wheelchair accessible while 50% of taxis are wheelchair accessible (down from 54% in 2016).

Table 3.3 – Wheelchair accessibility

	Taxi	PHV
Wheelchair Accessible	50%	3%
Not Wheelchair Accessible	50%	97%
Total	**100%**	**100%**

Base: 216

3.3.3 Drivers were also asked to indicate whether their vehicle is low emissions, with the results are in Table 3.4. In 2016 the proportion of vehicles with low emissions was just over half for each of taxi and private hire vehicles (51% and 55% respectively). The results in 2019 show this has dropped, in the case of taxis by 20%.

Table 3.4 – Low emissions vehicles

	Taxi	PHV
Low Emissions	31%	44%
Hybrid	4%	8%
None of these	65%	48%
Total	**100%**	**100%**

Base: 216

3.3.4 Drivers were then asked about ownership of their vehicle, of those who owned their vehicle two drivers shared it with one other driver whilst nobody who rented a vehicle stated they shared this vehicle.

Table 3.5 – Vehicle Ownership

	Taxi	PHV
Own	72%	88%
Rent	28%	13%
Total	**100%**	**100%**

Base: 216

3.4 About Your Business

3.4.1 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 3.6 show the results in percentages related to the total number of respondents for each licensing type. Some respondents who do not normally work at these times answered this question and it is assumed this is based on their experiences when they do work at this time. The only time over 10% of taxi drivers wait less than 15 minutes for a fare is on a weekend night time which probably reflects why most taxi drivers work on a weekend night time. Other than weekday night times and Sunday night times, over 20% of private hire drivers wait less than 15 minutes and both these time periods still have 10% of drivers stating they wait less than 15 minutes.

Table 3.6 – Average wait time between fares

	Taxi / Both				
	<5 mins	5-10 mins	10-15 mins	>15 mins	I never work at this time
Weekday Daytime	0%	0%	0%	74%	26%
Weekday Night time	0%	0%	0%	58%	42%
Weekend Daytime	0%	1%	4%	53%	42%
Weekend Night time	1%	0%	14%	74%	11%
Sunday Daytime	0%	1%	1%	50%	47%
Sunday Night time	0%	1%	1%	44%	53%

	Private Hire				
	<5 mins	5-10 mins	10-15 mins	>15 mins	I never work at this time
Weekday Daytime	5%	8%	13%	60%	14%
Weekday Night time	3%	6%	8%	40%	44%
Weekend Daytime	6%	10%	13%	47%	26%
Weekend Night time	8%	7%	16%	31%	39%
Sunday Daytime	6%	6%	10%	46%	33%
Sunday Night time	3%	6%	5%	34%	53%

Base: 216

3.4.2 Drivers were asked whether they had been a victim of an attack from a passenger in the last 12 months. The results in Table 3.7 show a difference between taxi and private hire drivers with more taxi drivers than PHV drivers being verbally or physically attacked. The differences vary from the 2016 survey and for this reason the 2016 survey results are shown alongside 2019. There has been a decrease in the proportion of PHV drivers who have been physically attacked but all others have increased.

Table 3.7 – Victim of attack in the last 12 months

	2019		2016	
	Taxi	PHV	Taxi	PHV
Physically Attacked	15%	3%	13%	8%
Verbally Attacked	68%	41%	51%	25%
Not Attacked	17%	56%	34%	65%
No answer	0%	0%	1%	2%
Total	**100%**	**100%**	**100%**	**100%**

Base: 216 (2019); 174 (2016)

3.4.3 Drivers were asked how frequently they carry a passenger in a wheelchair. The results are in Figure 3.6.

3.4.4 Table 3.8 shows the split based on whether the respondents' vehicles are wheelchair accessible. Almost 1 in 4 taxi drivers and over 1 in 3 private hire vehicle drivers carry passengers in a wheelchair without a vehicle which is wheelchair accessible.

Figure 3.6 – Average number of times carrying passengers in a wheelchair

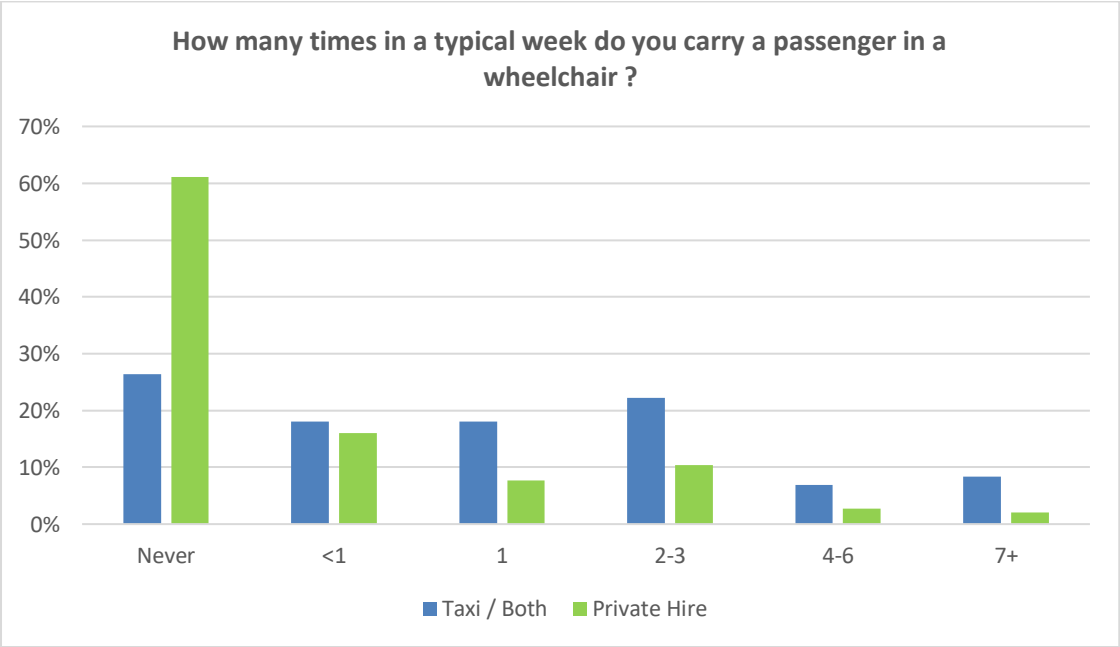


Table 3.8 – Wheelchair accessibility and carrying wheelchair users

	Taxi	PHV
Do not carry wheelchair users	26%	61%
Carry wheelchair users and vehicle is wheelchair accessible	50%	3%
Carry wheelchair users and vehicle is NOT wheelchair accessible	24%	36%
Total	**100%**	**100%**

Base: 216

3.4.5 Private hire drivers are more likely to use a vehicle which is not wheelchair accessible to carry a wheelchair passenger.

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 Your Vehicle(s)

4.2.1 Proprietors were asked how many vehicles they owned, and how many of these were either taxis or private hire vehicles. Results are shown in Table 4.1. Whilst the number of responses differs from 2016, the proportion of proprietors who own one vehicle is 1% different (87% in 2016, 86% in 2019).

Table 4.1 – Number of vehicles owned

	Frequency	Percentage
1	67	86%
2-5	9	12%
6-10	2	3%
Total Number	78	100%

4.2.2 Table 4.2 shows the results broken down by vehicle type.

Table 4.2 – Number of vehicles owned by type

	Taxi	PHV
1	32	38
2-5	5	4
6-10	1	1
Total Number	38	43

4.2.3 Proprietors were asked whether their vehicles were saloon cars, London black cabs or minibus/people carriers. Most proprietors owned saloon car style vehicles, with 63 proprietors owning at least one of these vehicles. A further 20 people owned minibus/people carriers and 9 people owned London black cabs. Eleven proprietors owned more than one type of vehicle.

4.2.4 The next questions were about how many wheelchair accessible and vehicle emissions owned. Tables 4.3 and 4.4. These have been grouped to summarise the results.

4.2.5 17% of respondents owned wheelchair accessible vehicles.

4.2.6 Just over half the proprietors owned low emissions vehicles only, whist nobody owned electric vehicles and 4% of proprietors owned a hybrid.

Table 4.3 – Vehicles with wheelchair accessibility

	Wheelchair Accessible
None	60
One	15
Two	1
Three	0
Four	1
Five	1
% with all their vehicles with wheelchair accessibility	17%
Total	**78**

Table 4.4 – Low emission, Hybrid and Electric vehicles

	Low Emissions	Hybrid	Electric
None	35	75	78
One	39	3	0
Two	4	0	0
Number of proprietors: all their vehicles with low emissions / hybrid electric	39	2	0
% of proprietors: all their vehicles with low emissions / hybrid / electric	50%	3%	0%
Base	**78**	**78**	**78**

4.2.7 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 8% both driving and renting out and another 6% renting their vehicles only. In 2016, 84% of proprietors drove their vehicle compared to 86% in this survey. This indicates the majority of respondents received the driver questionnaire also, which involved overlapping questions. Of those who do rent their vehicles, Table 4.6 shows that over half the Proprietors rent out their vehicles to only 1 or 2 drivers.

Table 4.5 – Drive or rent vehicles

	Frequency	Percentage
Drive	67	86%
Rent	5	6%
Both	6	8%
Total	78	100%

Table 4.6 – Number of drivers renting the same vehicle

	Frequency	Percentage
1-2	6	55%
3-5	3	27%
6-10	2	18%

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.

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.

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

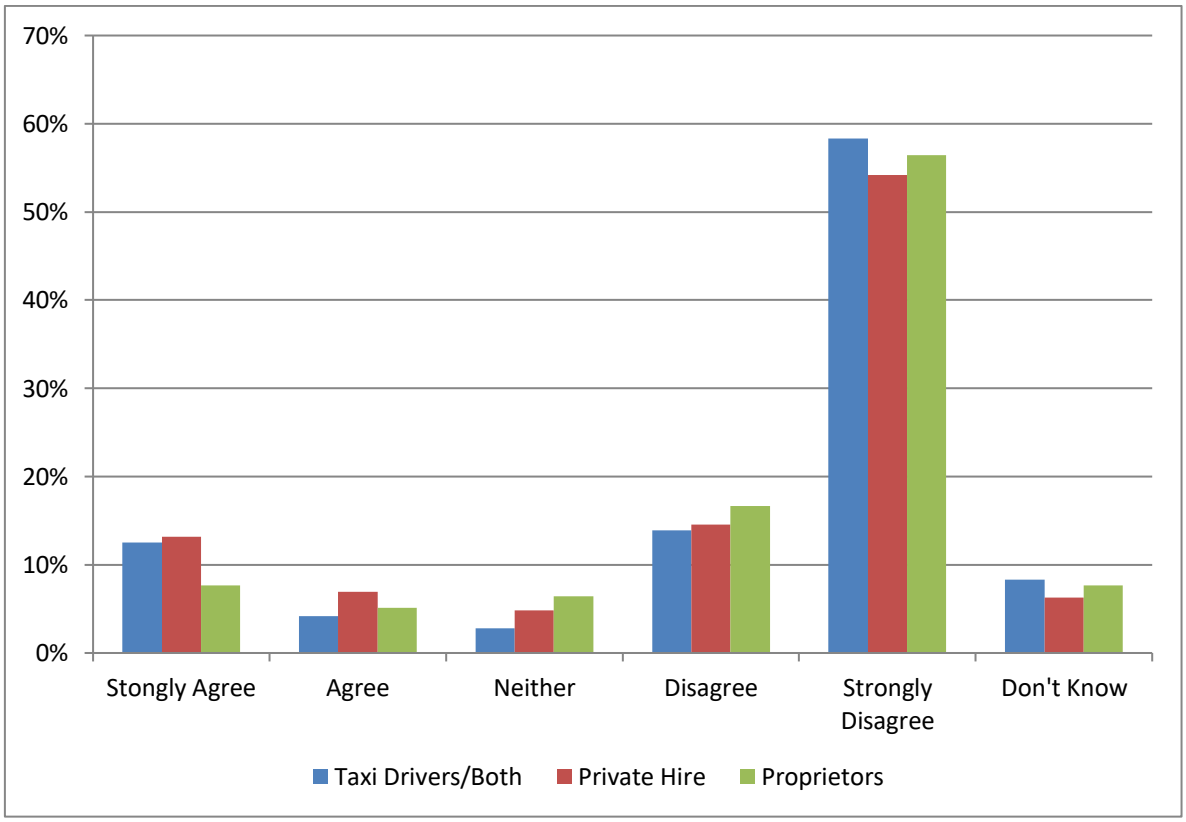
Respondent	Vehicle type	Too many	About right	Too few	No opinion
Taxi Drivers/Both	Taxi	92%	7%	0%	1%
	Private Hire	92%	4%	0%	4%
Private Hire Drivers	Taxi	77%	14%	3%	6%
	Private Hire	90%	8%	1%	1%
Proprietors	Taxi	79%	15%	3%	3%
	Private Hire	79%	15%	1%	4%
Overall	Taxi	81%	13%	2%	4%
	Private Hire	88%	9%	1%	2%

5.1.3 The overall view of drivers and proprietors is that over four out of five drivers / proprietors (80%+) feel there are too many taxis and private hire vehicles in Cardiff whilst 2% of all respondents feel there are too few taxis in Cardiff and 1% of all respondents feel there are too few private hire vehicles.

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 have not seen any negative side effects from the moratorium.

Figure 5.1 – Level of agreement with the statement:

'the cap on taxi licences in Cardiff has reduced the availability of taxis.'

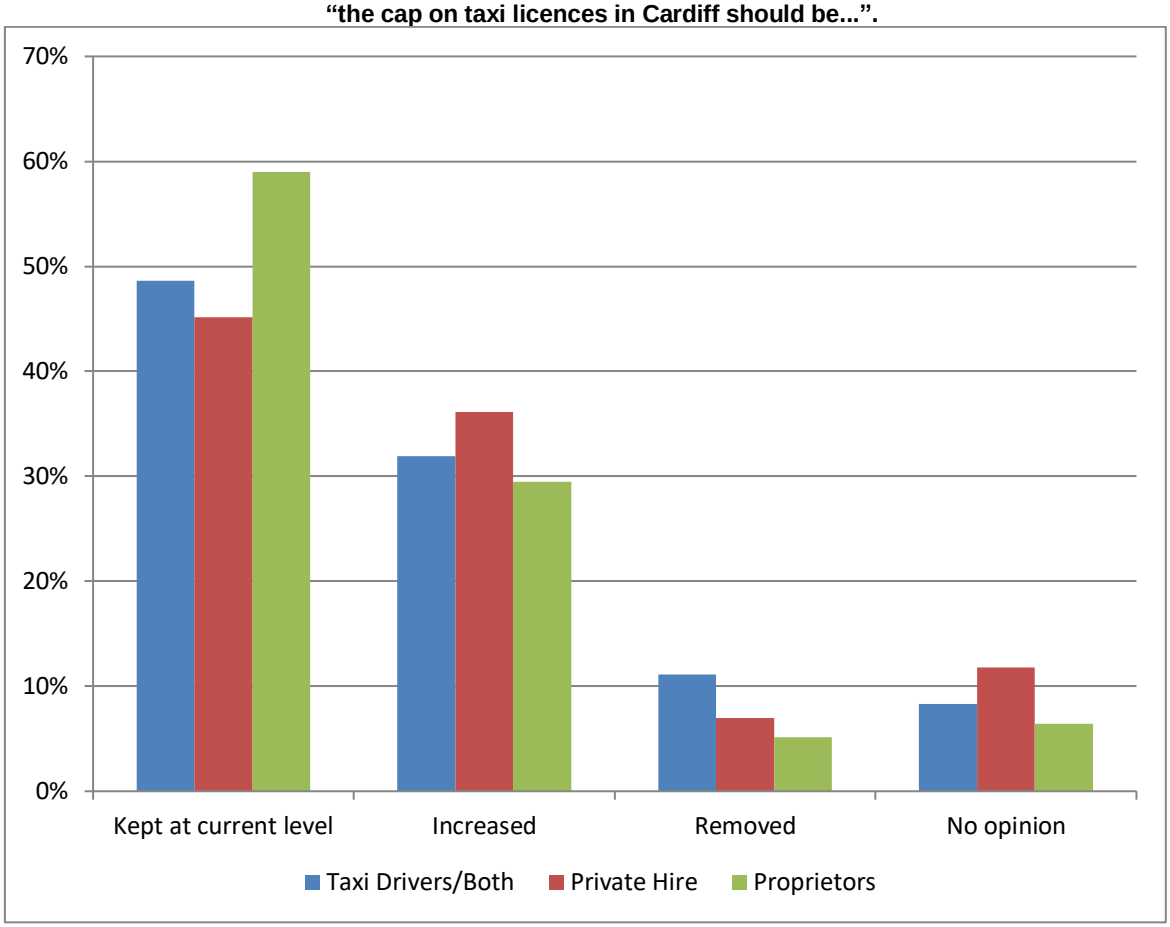


Base: 72 Taxi Drivers; 144 Private Hire Drivers; 78 Proprietors

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.

Figure 5.2 – Level of agreement with the statement:

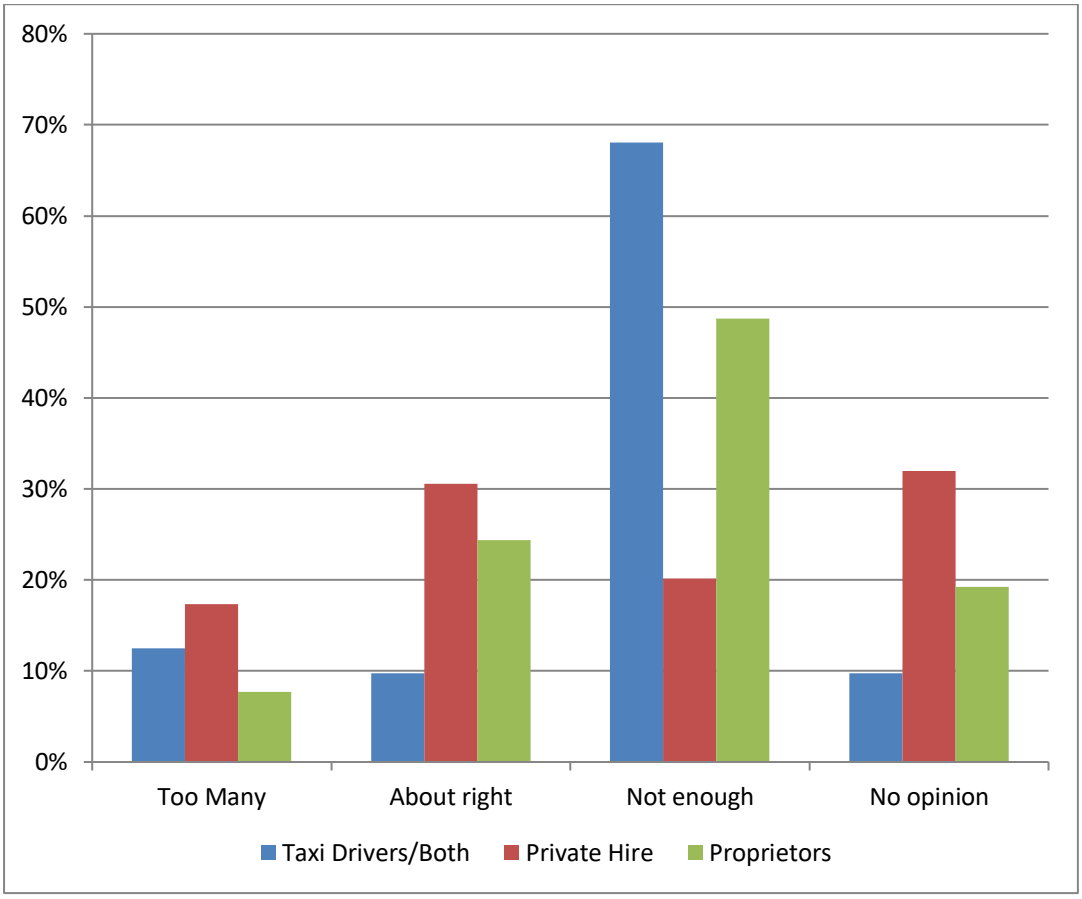
"the cap on taxi licences in Cardiff should be...".



Base: 72 Taxi Drivers; 144 Private Hire Drivers; 78 Proprietors

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 of those who had an opinion. Proprietors' views echo taxi drivers with a majority suggesting that there are not enough ranks.

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



Base: 72 Taxi Drivers; 144 Private Hire Drivers; 78 Proprietors

5.1.7 Those who suggested there were not enough ranks had the chance to suggest up to three new rank locations, although some 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. Some private hire drivers also suggested locations where ranks could be improved. The area of Castle Street / Kingsway / Duke Street was cited as the most popular location.

5.1.8 For comparison, the 2016 study asked for suggested new ranks with the top three listed being Castle Street, Wood Street and Central Station. 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.

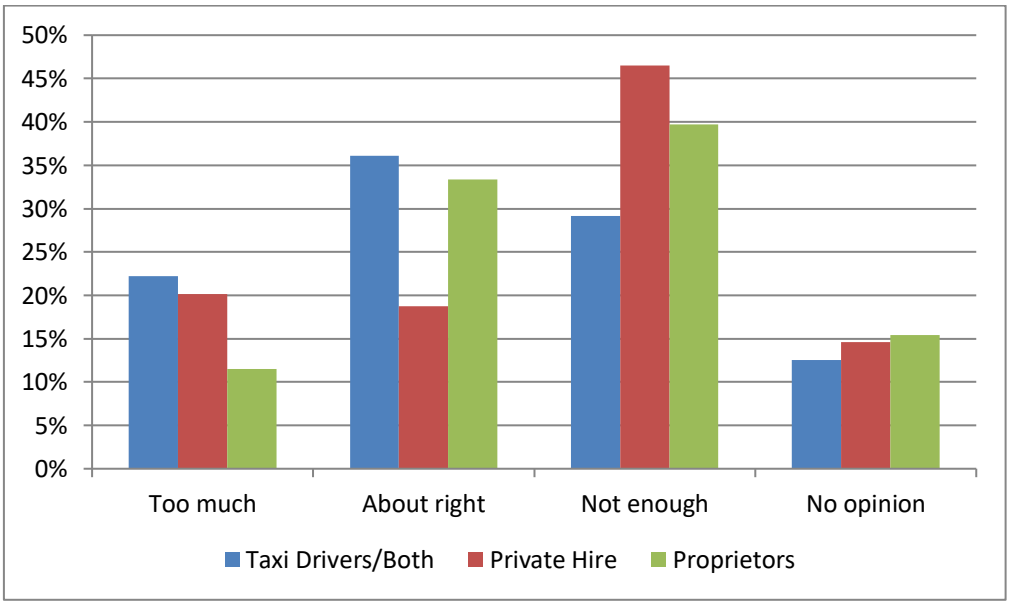
Table 5.2 – New rank locations suggested by taxi drivers

	Frequency	Percentage
Castle Street / Duke Street / Kingsway	35	30%
Wood Street / Principality Stadium	17	15%
Westgate St / St Mary St / The Philharmonic	17	15%
Train Stations (including increased space)	15	13%
Cardiff Bay / Mermaid Quay / Millennium Centre	11	9%
Park Place / Cathays / Student union	6	5%
Heath Hospital	6	5%
City Centre (generic, no specific location)	22	19%
Increase space at current ranks	10	9%
Base	116	

5.1.9 To give Table 5.2 some additional context, when taxi drivers were asked which ranks they use most frequently over half stated St. Mary's Street and Mill Lane (61% and 58% respectively). Greyfriars is the next most frequently used rank, mentioned by 29% of taxi drivers.

5.1.10 When asked about the level of enforcement currently on the trade in Cardiff, 36% of taxi drivers thought that the level of enforcement was about right with the remaining proportion being split between too much and too little. 47% of private hire drivers believe that there is not enough enforcement. Proprietors gave a similar point of view as private hire drivers, with most suggesting that there is not enough enforcement. The results are in Figure 5.4.

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



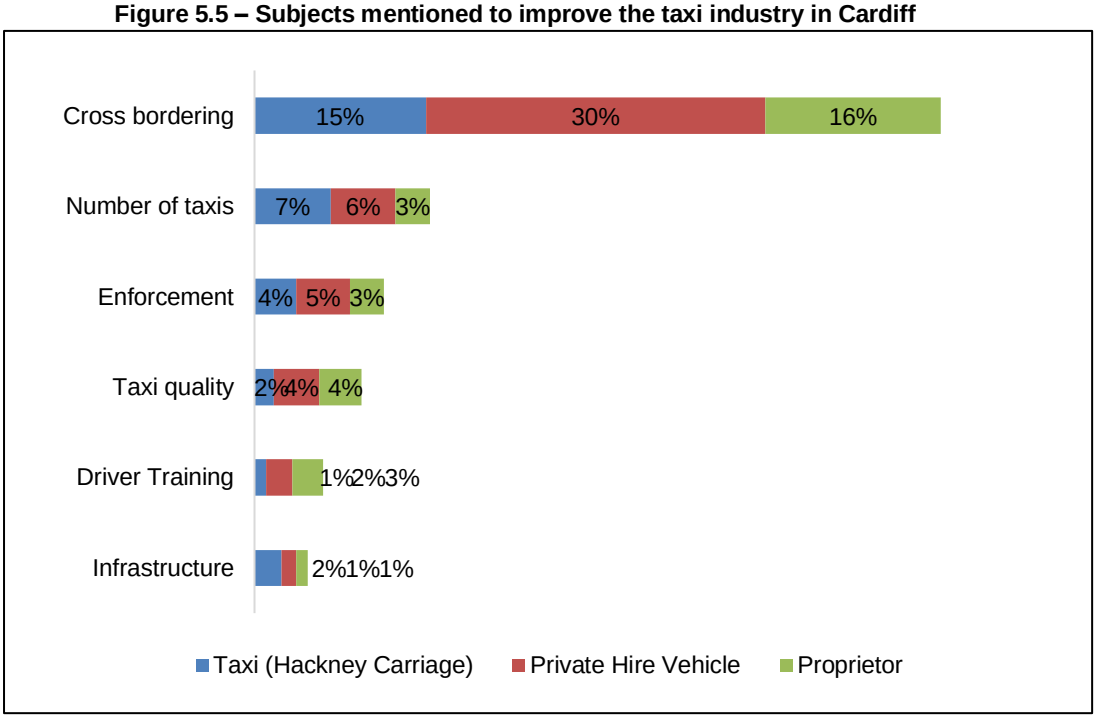
Base: 72 Taxi Drivers; 144 Private Hire Drivers; 78 Proprietors

5.1.10 For comparison, licensed vehicle drivers in the 2016 study were asked about their views on the current level of enforcement on the trade within Cardiff and the proportion of people who feel there is not enough enforcement, whilst similar, has increased by up to 5% for taxi drivers and proprietors. A proportion of taxi drivers have moved from feeling enforcement levels are about right to not enough whilst proprietors have mainly moved from too much enforcement to not enough. The proportion of private hire drivers who feel there is too much enforcement has doubled in percentage terms since 2016, with the percentage of drivers feeling enforcement is about right reducing by a similar amount.

5.2 Improvements and Comments

5.2.1 The questionnaire ended with a section asking if they had 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.

Figure 5.5 – Subjects mentioned to improve the taxi industry in Cardiff



Responses shown as % of all 294 respondents

Cross bordering

5.2.2 The most widely provided response given was to restrict or stop cross-bordering. 61% of respondents felt that cross-bordering needed to be addressed, with stricter regulations put in place to assess driver capabilities and some drivers went further by suggesting this needs to be reduced or stopped. This subject was the most widely mentioned improvement by all types of respondent, i.e. proprietors (59% mentioned), taxi (62%) and PHV drivers (66%). The quotes shown give examples of the types of comments provided:

> *"I believe we are experiencing too many taxis from outside Cardiff working in Cardiff daily. Cardiff Council need to act immediately to protect the drivers and the customers. They are taking our jobs and also causing traffic in Cardiff city centre during the night and the weekend." (Taxi Driver)*
>
> *"The cross bordering is killing our trade. Cardiff is a city that has its own drivers. who have gone through the rigorous training and paid premium prices for their licences and courses. and now you have companies such as uber etc. sending applicants to Merthyr where they can acquire a license in a matter of days and then come an work in Cardiff. I think its totally unfair practice." (Private Hire Vehicle Driver)*
>
> *"Maybe spot checks on vehicles and drivers, stop out of town taxis coming into Cardiff working as there should be rules to only work in the city where your vehicle is licensed."(Proprietor)*

Number of taxis/licenses

5.2.3 The next most widely mentioned theme amongst the responses was the amount of taxis operating in Cardiff, as 16% of respondents thought it was an important issue. They felt that there was far too many operating within the city and that there were too many licenses available. Taxi drivers (28%) were the most likely to mention this theme compared to and PHV drivers (12%) and proprietors (12%).

> *"Not to issue any more badges as there are too many drivers in Cardiff and not enough business. You have to wait up to 2 hours for a fare, as there are too many Uber drivers picking up from the city centre which is not far on hackney drivers" (Taxi Driver)*
>
> *"This city need cap on P/H and no more Hackneys plate to be issued as driver are far more hours than they should as Cardiff got more taxi in city than ppl 800 to 900 hundred plus 1400 Cardiff PHV plus 986 Hackney in city far too many for city like Cardiff so happy for survey like high light problem of taxi trade" (Proprietor)*

Enforcement and inspection of licenses

5.2.4 Another key theme that was raised was more enforcement of licenses and behaviour of drivers, which ties in with comments about cross bordering. Although the number of taxis and licences was asked in the survey, 12% of respondents included a comment that current checks and inspections are insufficient and needed improvement. Taxi drivers (15%) were more likely to see this as an issue than PHV drivers (10%) of all responses mentioned it as an issue.

> *"More vehicle and driver inspections most definitely, with authority to remove from the trade if required" (Taxi Driver).*
>
> *"There should be more checks on cabs as some of them are stinking inside. Also you will find some cars are going round with their licence plate in the back window instead of outside and you can't read them properly plus there are a few disabled cabs going round without displaying disabled badges to show they carry wheelchairs." (Taxi Driver)*

Taxi quality

5.2.5 A tenth (10%) of respondents expressed that the quality of taxi needed improving, this included a desire to renovate or replace old taxis. Proprietors (14%) were twice as likely to see this as an issue in Cardiff than both taxi (7%) and PHV drivers (8%). Taxi cleanliness also showed to be a concern for respondents, feeling that all vehicles should have a higher standard when working.

> *"Some of my regular customers frequently complain about other taxis being dirty and smelly, none of us are too busy to clean our cars, even during the working day" (Private Hire Vehicle Driver)*

> *"More vehicle inspections would improve the standard and safety of vehicles as there are currently a high number of very old cars still being used or cars that are in a very poor condition (including being very dirty inside)" (Proprietor)*

Driver Training

5.2.6 6% of respondents mentioned driving training and quality to be an issue. Some felt driver training needed to be improved to bring up the standard of professionalism and in particular improve the knowledge of journeys and the English language. Similarly to taxi quality, proprietors (10%) were twice as likely to see this as an issue in Cardiff than both taxi (4%) and PHV drivers (5%).

> *"Driver training needs to be improved with regards customer service. Better language skills would be beneficial also." (Proprietor)*

> *"As I have stated in previous surveys I feel that the professionalism of taxi drivers could be improved with a dress code smart casual would be a great improvement and also the attitude when approached by fare paying passengers by a simple hello how can I help you very simple common sense which seems to be lacking and most of all be proud of Cardiff as a capital city" (Private Hire Vehicle Driver)*

Infrastructure

5.2.7 Infrastructure was another popular response with 5% of all respondents mentioning it as an area of improvement. These improvements ranged from improving and expanding taxi ranks and lanes to introducing and improving electric vehicle infrastructure like charging points. This infrastructure improvement was desired by taxi drivers most (10%) whilst PHVs (3%) and proprietors (4%) thought it was slightly less urgent.

> *"The ranks that are available are very small in length and not many taxi can fit, so it would be nice to have more space to fit more vehicle." (Taxi Driver)*

> *"More funds and easy facilities for taxi drivers to buy latest cars and use new technology cars and electric cars, and so on." (Private Hire Vehicle Driver)*

Other comments

5.2.8 Respondents had the opportunity to express whether they had any other comments. The majority of responses reiterated points made in previous questions, most similarly to 5.2 Improvements and Comments. These included improving the quality of taxis, reducing the number of taxis/licenses and reducing and stopping cross-bordering.
One theme not mentioned previously was increased driver protection. 8% of people who answered this question mentioned it as an issue that needs improving. Safety improvements for drivers included more CCTV within taxis and improved police response to incidents.

> *"There is no protection for, taxi drivers they get abused and treated badly from everywhere and get disrespected including licensing office management. The police ignore any offence and attacks that we suffer this shouldn't be happening. Majority of taxi drivers are doing great job they deserve to be respected it is a job like any other job Taxi drivers shouldn't suffer discrimination." (Private Hire Vehicle Driver)*

This comment from a private hire vehicle driver below summarises the views of drivers in Cardiff.

"Vehicle inspections should be increased and ENFORCED, driver checks should be increased and ENFORCED, out of town drivers should be banned from trading in Cardiff area as a lot of the time they are taking work that should be available to Cardiff registered drivers, also on this point out of town drivers are not required to meet the same standards as Cardiff drivers, thereby creating unfair conditions. Taxi companies should be subject to checks to ensure that they provide adequate services to their drivers, and customers. Hackney drivers should be prevented from causing traffic problems at certain ranks, a designated number of car slots should be provided according to the space available and strictly enforced. The ability to speak the English language reasonably well should be a requirement, for the safety and comfort of passengers, also knowledge of the area must be demonstrated as many people are unhappy with present standards. Inspectors should be more evident on the streets and enforcement of regulations must be improved, this would result in raising standards all round." (Private Hire Vehicle Driver)

Comparison to previous studies

5.2.9 There were many themes that were brought up both in the 2019 and 2016 study. The top response in 2016 was improving enforcement with tackling cross-bordering coming in second. Although these two remained within the top 3 most popular responses, cross-bordering became the most popular response with 61% compared to the enforcement with 12%. Common themes in both the 2016 and 2019 reports include; number of licensed vehicles, improved driver training and improving taxi ranks/infrastructure. Although the popularity and importance of improvements changed, the key themes stayed consistent between the two studies. The amount of taxis/licenses within Cardiff was a popular theme throughout the 2013, 2016 and this 2019 study.

6 Summary and Conclusions

6 Summary and Conclusions

6.1 Introduction

6.1.1 Two questionnaires were completed in May and June 2019, one by drivers and the other by proprietors. There was an overlap where some proprietors also work as drivers which may have led to duplicate views. The response rate for the drivers questionnaire was 9.3% and for proprietors was 4.7%

6.1.2 Responses were provided by 66 taxi drivers, 144 private hire drivers and 6 who operate as both. The proprietor analysis is based on 78 responses with a close split of taxi (45%) and private hire (51%) with 4% as both.

6.2 About You

6.2.1 The working hours of taxi drivers was 45 hours compared to private hire drivers who average a similar 43 hours. This has increased by 10% for private hire drivers compared to the 2016 study whilst taxi drivers have remained static (44.5 hours in 2016).

6.2.2 More taxi drivers work weekend nights than private hire drivers, whilst a higher proportion of private hire drivers work on weekend days, with a much higher proportion on a Sunday.

6.3 About Your Vehicle

6.3.1 Half the taxi drivers have wheelchair accessible vehicles whilst only 3% of private hire vehicles do. 17% of proprietors have wheelchair accessible vehicles.

6.3.2 A little over a third (35%) of taxi drivers use vehicles with low emissions or hybrids whilst just over half (52%) of private hire vehicle drivers use them. Just over half of proprietors (55%) own low emission or hybrid vehicles.

6.3.3 A higher proportion of private hire drivers own their vehicles compared to taxi drivers (88% compared to 72%). The majority of proprietors own one vehicle (86%) suggesting they are drivers as well as proprietors.

6.4 About Your Business

6.4.1 Most taxi drivers (68%) feel there are not enough taxi ranks in Cardiff and 9% mentioned that that increasing space in the current ranks is necessary. Castle Street, Wood Street and Central Station were the locations most taxi drivers recommended for additional taxi ranks in 2016, and this remains the case in 2019 although Westgate Street / St Mary Street came in above the station in 2019.

6.4.2 Taxi and private hire drivers wait longer than 15 minutes for a fare, irrespective of time of day. One private hire driver commented "….at present I and many other drivers (are) waiting 2 hours plus"

6.4.3 Over half (68%) of taxi drivers and just under half (41%) of private hire drivers say they have been verbally attacked in the past 12 months and 15% of taxi drivers have experienced a physical attack compared to 3% of private hire drivers.

6.5 Your Views on the Trade

6.5.1 Most drivers and proprietors (over 50% of each) strongly disagreed with the statement that the licence cap had reduced the availability of taxis, over 75% of each felt there were too many taxis and private hire vehicles to meet demand and less than 10% of drivers felt the cap should be removed. Therefore from the point of view of drivers and proprietors there is a view that the cap isn't having a detrimental effect on the service.

6.5.2 There was a mixed view about enforcement. Whilst nearly half the private hire drivers felt there was not enough enforcement, taxi drivers views were more evenly split whether there was too much (22%) and not enough (29%) with the remainder of taxi drivers either having no opinion or felt the level was about right.

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

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 and times 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 , hybrid or ele
(Please tick one box only)

None of these ☐ Q10.1 Low Emissions ☐ Q10.2

Electric ☐ Q10.4 Hybrid ☐ Q10.4

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

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-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

Mask responses based on Q6a: do not show if selected at Q6a

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

	< 5 mins	5-10 mins	10-15 mins	> 15 mins	I never work at this ti
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 a passenger in a wheelchair ?
(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; driver training standards; licensing administration)

YOUR COMMENTS

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

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.

Need to change date of return at very end of questionnaire & re-number

3. How many licensed vehicles do you own?

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

4. What proportion of your vehicles best meet the following descriptions?
Please give you answers in % and make sure the total adds up to 100%. Put in a zero if you do not own a specific type of vehicle

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

5. How many of your vehicles are wheelchair accessible?
(Number) [ ] Q5.1

6. How many of your vehicles are low emissions, hyrbid or electric?
(Number)

Low Emissions [ ] Q6.1 Hybrid [ ] Q6.2 Electric [ ] Q6.3

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

Cardiff Taxi Study

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

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; driver training standards; licensing administration)

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

AECOM Imagine it. Delivered.

Cardiff Taxi Licensing Study 2019

Part 3: Operator and Stakeholder Attitude Survey

Cardiff Council

30 September 2019

Prepared by: Alex Jones..... Checked by: Neil Rogers.....

Verified by Ellena Caudwell..... Approved by: James Gait.....

Cardiff Taxi Licensing Study 2019: Part 3: Operators and Stakeholders Attitude Survey

Rev No	Comments	Checked by	Approved by	Date
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Job No 60600820 Cardiff Taxi Study 2019 Date Created September 2019

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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 studies that took place in 2013 and 2016.

E.1 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.2 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.3 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.4 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 2019: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2019: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2019: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2019: Part 4: Summary Report	• Summary of the above surveys

E.5 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.6 Of the thirty-seven stakeholders contacted for the study, sixteen responded. Ten respondents reported having direct interaction with the trade. There was a mixture of taxis and private hire vehicles (PHVs) used by stakeholders. Given the sample size the views expressed may not be representative of all stakeholders of the taxi industry in Cardiff, but give an indication of views across a cross-section of taxi user groups. 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.

E.7 Two licensed operators responded to the online survey. The findings of these two operators will not necessarily be a true reflection of the wider industry and can only offer an indication of views, especially where the views differ. Both operators have taxis and PHVs in their fleet of vehicles. Both operators felt market conditions had become worse over the past 3 years and there were too many taxis on the road.

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 studies that took place in 2013 and 2016.

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 2019: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
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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, 2013 and 2016 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.

1.4 Report Structure

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

[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

- 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 'also referred to as hackney carriages - black vehicle with white bonnet or all black London-style taxis, with a 'taxi' sign on roof which 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 37 stakeholders were contacted of which 16 responded (43% response rate). Table 2.1 summarises the type of organisation the respondents represent whilst Table 2.2 outlines the nature of the interaction with the taxi industry these respondents said they have.

Table 2.1 – Stakeholder profile by organisation type

Organisation type	Number
Local interest group	3
Hotelier	3
Transport operator	2
Visitor attractions	1
Other*	7
Total	**16**

*Other type of stakeholders include people using taxis for other business reasons and a crime reduction manager

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)	9
I use vehicles for business travel	8
I manage business contracts with Taxi and PHV operators	3
I manage taxi/PHV operations (e.g. taxi marshals)	2
Enforcement	1
No direct interaction	6
Other: contracts the Night Marshal service	1
Total	**34 (Base: 16)**

[3] Multiple responses allowed

2.2.2 Respondents were asked to rate the quality of Taxis and/or PHVs across various metrics according to which ones their organisation uses. Table 2.3 shows the views of stakeholders about the vehicle appearance and while the low bases need to be considered, it is the internal cleanliness which shows the most difference with fewer respondents considering taxi internal cleanliness good compared to private hire vehicles.

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	0	0	0	2	0	0
Good	8	8	6	6	9	8
Neither	5	5	4	4	3	2
Poor	1	2	2	0	1	0
Very poor	1	0	1	1	0	1
Don't know	1	1	3	2	2	4
Total**	**16**	**16**	**16**	**15**	**15**	**15**

**** Caution – very low response base means that results are indicative only.**
One respondent was not asked about PHVs

2.2.3 Generally speaking half the responding stakeholder organisations use taxis more frequently and the other half use PHVs more frequently. The reason for this is often need dependent.

'99% of requests are for short journeys and (guests) request of a local taxi' *Hotelier*
'We ring private hire companies, we don't flag them down on the street' *Visitor Attraction.*

2.2.4 Of those who use taxis more frequently the reasons for this, including difference in quality were reported as:

- Wheelchair accessibility;
- Close location of taxi rank; and
- Better presented drivers and customer service.

Whilst those who more frequently use private hire vehicles reported:

- Assured of a good service, good drivers, knowledgeable and safe;
- Fast reservation and reliability; and
- Well maintained vehicles.

However, there was a view held by some stakeholders that it was the driver, rather than the license they held which varied, whether the behaviour is positive or negative.

'they differ depending on the individual'
'Private Hire more polite but it does depend who you get'
'General customer service and behaviour in both witnessed to have been very poor'

2.2.5 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 no difference in ratings of Taxis and PHV, especially those who consider each factor to be very good or good. One difference is that more people feel Taxi drivers are less likely to give a good customer service compared to PHV drivers.

Table 2.4 – Rating for Taxis on aspects of customer service

Rating:	Taxis						
	Driving skills	Driver courtesy	Route knowledge within Cardiff	Route knowledge outside the Cardiff area	Customer service	Waiting time	Availability of taxis
Very good	1	0	1	1	0	2	3
Good	5	7	7	2	4	5	9
Neither	4	3	5	3	4	4	2
Poor	4	4	0	2	5	2	1
Very poor	0	1	0	0	2	0	1
Don't know	2	1	3	7	1	3	0
Total**	**16**	**16**	**16**	**15**	**16**	**16**	**16**

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

Table 2.5 – Rating for PHVs on aspects of customer service

Rating:	Private Hire Vehicles						
	Driving skills	Driver courtesy	Route knowledge within Cardiff	Route knowledge outside the Cardiff area	Customer service	Waiting time	Punctuality
Very good	1	1	0	0	0	1	0
Good	5	8	7	4	6	4	8
Neither	3	1	4	2	3	5	1
Poor	2	1	0	2	2	1	2
Very poor	0	1	0	0	0	0	1
Don't know	4	3	4	6	4	4	3
Total**	**15**	**15**	**15**	**14**	**15**	**15**	**15**

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

2.2.6 Table 2.6 shows there is no evidence based on the data that stakeholders perceive that using Taxis and PHVs in Cardiff is unsafe. Respondents were asked about their perception of taxi ranks, even if they did not use them.

Table 2.6 – 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	1	4
Fairly safe	8	7	5
Neither	3	2	1
Fairly unsafe	3	0	0
Very unsafe	0	0	0
I don't do this	1	0	0
Total**	**16**	**10**	**10**

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

2.2.7 These views are echoed when the respondents were asked about safety for drivers and passengers in the taxi industry as a whole in Cardiff with half the respondents feeling safety for both drivers and passengers was good compared to those who felt it was poor (25% for passengers and 12.5% for drivers).

2.2.8 Respondents were asked about their experiences either using taxis and private hire vehicles as a disabled passenger or booking them on their behalf. Table 2.7 shows the numbers who have experience of this. Some respondents completed more than one task but overall 7 out of the 16 respondents have experiences from the perspective of disabled passengers.

Table 2.7 – Number of people booking Taxis/PHVs for a disabled passenger (including themselves)

Role in booking for passengers with disability	Number
Use and book taxis as a disabled passenger	2
Use and book private hire vehicles as a disabled passenger	2
Book taxis on behalf of disabled passengers	3
Book private hire vehicles on behalf of disabled passengers	6
Other*	8
Total	**Base: 16**

2.2.9 Table 2.8 shows the ease of booking both taxis and private hire vehicles and shows that whilst there's a mixed experience, more people find booking private hire vehicles easier.

Table 2.8 – How easy is it to book for a passenger with disabilities (including themselves)

Ease of booking	Taxi	PHV
Very easy / Fairly easy	2	4
Very difficult / Fairly difficult	2	2

2.2.10 One respondent couldn't say it was easy or difficult because it all depends whether a vehicle with wheelchair access is available at the time of booking.'

'It depends on the demand and whether there is a vehicle within the area to accommodate the guest and perhaps a wheel chair that does not fold down. We have had issues in the past where…. an accessible car with ramp access has not been available'. *Hotelier*

2.2.11 Each person provided detail to share why they felt it was easy or difficult and examples are shown below.

'(PHVs) are usually keen to provide relevant vehicles for your request especially if it includes wheelchair access while taxis often have no facilities working.' Local interest group

'The taxi firm is really accommodating and will send us the vehicle which meet the guests needs' *Hotelier*

'It's very difficult to find phvs to meet access requirements like hearing loops or full wheelchair access' Local interest group

'As I find it difficult to get into a high vehicle I very often find the step to assist this is not working if I go to a taxi rank in the city centre I have to wait for a lower vehicle to arrive and often the drivers waiting for fares on the rank are quite rude and try to insist that they are next to take a fare this could be quite upsetting for a frail person.'

2.2.12 Generally speaking stakeholders agree that fares and waiting times for taxis in Cardiff are reasonable, however the data indicates that respondents feel that there are times when Taxi drivers refuse fairs.

Table 2.91 – Rating for Taxis on aspects of price and supply

Rating:	Fares seem reasonable for the journey undertaken	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	Taxi drivers never refuse a fare
Agree strongly	2	2	3	1	0	1
Agree slightly	3	4	5	3	1	0
Neither	4	3	1	2	5	2
Disagree slightly	1	0	0	3	3	4
Disagree strongly	0	1	1	1	1	3
Don't know	0	0	0	0	0	0
Total**	**10**	**10**	**10**	**10**	**10**	**10**

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

2.2.13 Stakeholders agree that waiting times and supply of PHVs is reasonable, whilst most stakeholders agreed that fares are reasonable and predictable, some stakeholders disagreed slightly with this, one respondent disagreed with both statements.

2.2.14 The three respondents who disagreed that private hire drivers never refuse a fare also disagreed that taxi drivers never refuse a fare.

Table 2.92 – 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	Private hire vehicle drivers never refuse a fare
Agree strongly	2	2	3	1	2
Agree slightly	3	7	6	4	3
Neither	2	0	0	2	1
Disagree slightly	2	0	0	2	2
Disagree strongly	0	0	0	0	1
Don't know	0	0	0	0	0
Total**	**9**	**9**	**9**	**9**	**9**

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

2.2.15 The only person who felt there wasn't an adequate supply of Taxis at all times referenced the school run as times when availability was inadequate.

2.2.16 Stakeholders were asked if they had seen a change in the availability of taxis and private hire vehicles in the past three years and of the 13 times when the respondent stated that availability had increased or decreased only one person felt it had decreased and this was for both taxi and PHVs. Seven people felt availability had increased.

2.2.17 Stakeholders were offered the opportunity to discuss what the most important issues are for the taxi industry and any other views they had. The answers were varied and are provided in full in Appendix A. Other than issues raised in this report, e.g. accessibility for disabled passengers, the main themes are:

- Management of taxi waiting areas:
  - PHV parking whilst waiting for next passenger
  - Using bus stops as a rank because of volume of taxis
  - Compliance with night marshals
- Driver behaviour and appearance, vehicle appearance and reliability.
- Drivers who are based outside Cardiff with poor quality driving / knowledge
- Refusing fares (especially during events)
- Improved security / enforcement:
  - Internal cameras in a vehicle with audio
  - Driver training / test

2.2.18 Examples of the comments received are:

'Where the taxi's park, not using private area while waiting for a call for the next booking'.

'The industry needs to address the ranking of taxis & PHVs in bus stops in the City Centre, and also bus lanes, caused by the massive increase in volume. For example, Lower St Mary Street bus stop, the main terminus for services whilst there is no bus station, is inaccessible after a certain time of an evening because of taxis ranked back from the Wood Street junction to the railway station'

'Taxis complying with night marshals, ranking correctly, refusing short fares on event day'

'Taxis parking / waiting and picking up in unsafe or inconvenient areas - eg. Mill Lane / St. Mary's St and Park Place outside Jury's car park / access area.'

'The behaviour of many taxi drivers is appalling…. obstruction of taxis across double yellow lines and in front of our (hotel) car park entrance with no success of change…..has resulted in inappropriate verbal behaviour by the drivers. This can be very intimidating and does not represent a great impression to Cardiff for guests visiting the city'.

'I think that all taxi and private hire car drivers should dress 'tidy'

'It is not fair on local Cardiff drivers, registered in the City to have competition from drivers from outside the city e.g. Newport, Ponty etc. The drivers from outside Cardiff do not know the road systems and we already have too many taxis registered in Cardiff.'

'Drivers allowing others to drive taxis Private hire out of town drivers with little or no knowledge, some of the uber and ola cars are dirty and not maintained.'

'Taxi's from neighbouring areas (particularly Newport,) seem more aggressive as drivers, and I am aware that they do not have to pass the same rigorous tests as the Cardiff drivers, maybe they should have to take some of the Cardiff tests.'

'Private hire test of knowledge for out of town drivers'.

'Internal cameras funded by the vehicle owner would increase perception of safety levels and raise customer service standards.'

2.2.19 One respondent made a proactive suggestion to improve driver customer service:

'Support for any future course to get drivers to be more ambassadorial about their city. Training and free tickets to some of the attractions to help them promote it to customers as a place to go and visit.'

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 seven 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 7 operators were contacted and 2 responded (29% response rate).

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

3.2 Operator Findings

3.2.1 Both respondents operate both taxis and private hire vehicles in Cardiff.

3.2.2 The operators were asked for the breakdown of their custom across pick-ups from various locations/by various methods. As shown in Table 3.1 the bulk of custom comes through telephone bookings. Whilst the second operator is finding app bookings are increasing to 30% which is 10% higher than the highest reported bookings via apps in 2016.

Table 3.1- Customer type by operator interviewed

Customer type	Operator 1	Operator 2
Pick-ups hailed at designated ranks	0%	0%
Work gained through contracts	20%	5%
Booked by telephone (exclusive of contract work)	80%	60%
Booked through an app (exclusive of contract work)	0%	30%
Booked online/via email (exclusive of contract work)	0%	5%

3.2.3 The larger of the two operators stated they had increased the number of vehicles and drivers in the past three years.

3.2.4 Both operators felt market conditions had become worse over the past three years and both operators cited cross bordering as their main reason for this.

'Cardiff is now being used by neighbouring taxi drivers. Drivers from Newport, Bridgend, Cynon, all flooding into Cardiff and working as Cardiff taxi drivers on the Cardiff streets'

'Due to the intrusion of non-Cardiff licensed vehicles coming from other areas there has been less demand'

3.2.5 Table 3.2 summarises the responses to various questions about the market conditions and number of vehicles and taxi ranks in Cardiff.

Table 3.2- Summary of market conditions / industry information

Market condition	Operator 1	Operator 2
Changes in the past 3 years	Number of drivers decreased; No other changes	Number of taxis, phvs and drivers all increased
Market conditions for their business	Worse	Worse
Number of Taxis in Cardiff	Too many	Too many
Number of PHVs in Cardiff	Too many	Right amount
Adequate number of taxi ranks in Cardiff	No opinion	Disagree
Adequate number of taxis ranks in wider Cardiff	Agree	No opinion

3.2.6 The operators were then asked about their fleet, specifically wheelchair accessibility and low emissions as well their future plans. Table 3.3 shows the outcomes. Neither operator had plans to increase the proportion or number of vehicles with wheelchair access over the next six months but both operators agreed that they would plan to increase the number of vehicles with low emissions.

Table 3.3- Wheelchair accessibility and Vehicle Emissions

Vehicle proportions	Operator 1	Operator 2
Taxis which have wheelchair accessibility	100%	25-50%
PHVs which have wheelchair accessibility	Under 25%	Under 25%
Taxis with low emissions	Under 25%	Under 25%
PHVs with low emissions	25-50%	25-50%

3.2.7 One operator wanted to clarify their comments about wheelchair accessibility and emissions as follows:

'(There needs to be) an understanding that the extent of wheelchair accessible vehicles requirement is not appropriate for the vast majority of customers nor the first choice for a wide range of ambulant or mobility difficulties, it is also environmentally un-friendly.'

3.2.8 The questionnaire also covered regulation with operators giving their views on vehicle standards from two perspectives, requirements and enforcement. Table 3.4 shows the views of the two operators.

Table 3.4- Vehicle Standards

Current standards	Operator 1	Operator 2
Vehicle quality requirements	They are not strict enough	They are not strict enough
Enforcement levels	They are not strict enough	They are not strict enough

3.2.9 When asked what would changes they would suggest about standards, whilst one operator did not offer an opinion, the other operator provided some thoughts.

'National or regional powers for enforcement officers'.

'Greater enforcement of plying for hire with 'out of town' vehicles'.

3.2.10 Other comments about the future of the taxi industry were offered and shown below.

'Rural provision could be improved in the Private Hire sector by developing a form of licensed 'community vehicle' with special licensing incentives (with some restrictions). Taxis could be encouraged to provide an improved sub-urban and rural service by a managed incentives scheme with links to the wider transport infrastructure.'

'Re-balance the wheelchair accessible vehicle fleet size by stipulating significantly higher environmental and vehicle quality standards on Hackney Carriage saloons and reducing the number of wheelchair accessible vehicles in a managed way'.

'Offer a very low interest loan scheme to Taxi drivers who invest in the most modern environmentally friendly wheelchair accessible vehicles.'

4 Summary

4 Summary

4.1 Summary

Stakeholders

4.1.1 A total of sixteen stakeholders responded to the online survey, ten of which had direct interaction with the licensed vehicle trade. The respondents were from a mixture of organisations, including local interest groups, transport operators, visitor attractions and hotels.

4.1.2 Respondents used a mixture of taxis and PHVs most frequently, with around half the stakeholders booking for other people or for their own business travel.

4.1.3 There was an even mix of stakeholders that used taxis and PHVs and general vehicle standards were comparable for taxis and private hire vehicles and the main difference was internal cleanliness, with less respondents stating taxis are good for internal cleanliness compared to private hire vehicles.

4.1.4 The reasons taxis were preferred by those who used them more frequently than PHVs were wheelchair accessibility, access to taxi ranks and well-presented drivers with good customer service whilst those who used PHVs more than taxis felt they were assured of a good, safe service with a reliable and fast reservation service and well maintained vehicles. Other stakeholders felt it depended on the day and the driver whether the service could be considered good.

4.1.5 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.

4.1.6 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.

4.1.7 Taxi rank locations were considered not easy to find with one respondent feeling they were easy to find and three feeling they were not easy however most respondents didn't have an opinion or did not know.

Operators

4.1.8 Two licensed operators responded to the online survey. The findings of these two operators will not necessarily be a true reflection of the wider industry and can only offer an indication of views, especially where the views differ. Both operators have taxis and PHVs in their fleet of vehicles and the majority of their work is telephone booking.

4.1.9 Both operators felt market conditions had become worse over the past 3 years and there were too many taxis on the road (there was a difference in opinion whether there were too many PHVs on the road).

4.1.10 Both operators felt vehicle quality requirements and enforcement levels were not strict enough and one operator suggested improvements such as national/regional powers for enforcement officers and more enforcement of vehicles based out of town plying for trade.

Appendix A

Organisation type	Suggestions for improvements
Hoteliers	Where the taxi's park, not using private area while waiting for a call for the next booking. Appearance of the driver. Paying by contactless payments Safer ways for lone passengers This applies to both.
Hoteliers	The behaviour of many taxi drivers is appalling. The hotel repeatedly speaks with For Cardiff and Licensing regarding the obstruction of taxis across double yellow lines and in front of our car park entrance with no success of change. In many occasions where the obstruction has caused issues with arriving guests either getting in to the car park or departing guests leaving the car park face to face conversations by hotel staff and guests has resulted in inappropriate verbal behaviour by the drivers. This can be very intimidating and does not represent a great impression to Cardiff for guests visiting the city. Location is by the New Theater on Park Lane.
Local Interest Group	Every driver for both should have a clearly displayed photo registration and a contact number to ring with any problems There should be a minimum standard of English spoken to prevent mistakes There should be regular monitoring and unannounced stop and checks
Local Interest Group	I think that all taxi and private hire car drivers should dress 'tidy' - I feel safer when the driver is wearing western style clothing - trousers / shirt / jumper - I do not propose uniforms or fitted jackets as that is not comfortable for driving and getting in and out of cars, loading the boot with luggage etc.. Taxi and Vehicle Hire drivers should obey the speed limits especially 20 mph in residential areas and should all be more respectful to cyclists especially when using 'bus lanes' or as I prefer to call them 'green lanes' reserved for buses, coaches, taxis and bicycles. It is not fair on local Cardiff drivers, registered in the City to have competition from drivers from outside the city e.g. Newport, Ponty etc. The drivers from outside Cardiff do not know the road systems and we already have too many taxis registered in Cardiff.
Local Interest Group	Accessible private hire vehicles
Transport operator	The industry needs to address the ranking of taxis & PHVs in bus stops in the City Centre, and also bus lanes, caused by the massive increase in volume. For example, Lower St Mary Street bus stop, the main terminus for services whilst there is no bus station, is inaccessible after a certain time of an evening because of taxis ranked back from the Wood Street junction to the railway station. This prevents disabled customers from accessing level boarding facilities to low floor buses. Buses also need to use the Westgate Street stops of a Friday and Saturday evening when Lower St Mary Street is closed for pedestrian safety. However, taxis & PHVs then rank in the bus lane & road here, again preventing access or even blocking buses into the stop. The volume & enforcement, mainly of the PHV industry to ensure they comply with the appropriate pre-booking legislation, needs to be addressed.
Transport operator	In terms of PH I believe they need to improve the quality of the service provided. Too many come to the city looking for a quick buck. In terms of Taxis then these are very poor. They appear unregulated in all areas, vehicle safety, driver ability and pricing. They regularly flout road traffic laws, doing U turns, blocking roads and bus lanes, park where they want and believe they have every right to do this. The taxis them selves appear very untidy and do not inspire confidence that the safety of the customer is at the forefront of their thinking. Compliance is second to profit.

Organisation type (cont.)	Suggestions for improvements
Other	Reliability of vehicles. Overall appearance of drivers. Overall appearance and cleanliness of vehicles. Tackle culture of refusing short distance fares. Better management of vehicles at waiting stands. Dealing with rogue taxi drivers. Improved standards of customer care for taxi drivers.
Other	As a wheelchair user and being reliant on accessible taxis, one of the most important issues for me is ensuring drivers are competent in handling wheelchair users. I have experienced being tipped out of my wheelchair on numerous occasions. Another issue is ensuring drivers are willing to pick up disabled users. Whilst there are many accessible taxis within the city many drivers are unwilling to pick up wheelchair users. This has been an ongoing issue for many years.
Other	Private Hire Vehicles are usually polite and seem to have a better knowledge. Taxi's seem to want to take the longest way around to make the fare more expensive, they do not get out of the drivers seat to help if thier fare needs a hand.
Other	both sorts need more wheelchair accessible vehicles
Other	To clamp down on taxis being licensed from outside the Cardiff Council area but trading in the city thus creating oversupply. Taxis parking / waiting and picking up in unsafe or inconvenient areas - eg. Mill Lane / St. Mary's St are and Park Place outside Jury's car park / access area.
Other	Taxis complying with night marshals, ranking correctly, refusing short fares on event days. Drivers allowing others to drive taxis Private hire out of town drivers with little or no knowledge, some of the uber and ola cars are dirty and not maintained.

AECOM Imagine it. Delivered.

Cardiff Taxi Licensing Study 2019

Part 4: Summary Report

Cardiff Council

30 September 2019

Prepared by: James Bracey..... Checked by: Ellena Caudwell.....

Verified by: James Gait ..... Approved by: James Gait….....

Cardiff Taxi Licensing Study 2019: Part 4: Summary Report

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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 studies that took place in 2013 and 2016.

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 2019: Part 1: Taxi Rank Operations and Public Attitude Survey	• Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2019: Part 2: Driver and Proprietor Attitude Survey	• Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2019: Part 3: Operator and Stakeholder Attitude Survey	• Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2019: 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 surveys show excess taxi supply across the city in all time periods, when compared to the effective taxi demand from passengers. The supply and demand profiles follow very similar patterns across each day type. The average delay time for passengers has remained similar to the 2016 study; 0.8 seconds in 2019 compared to 0.9 in 2016. The average taxi delay has increased slightly to 8.9 minutes, compared to 8.4 minutes in 2016.

2.1.2 There were rare occasions of unmet demand, with Saunders Road the only rank showing unmet demand lasting longer than 10 minutes. Further analysis of the data showed the rank capacity is a possible contribution this delay, as large numbers of passengers arrive at once from the train station whilst there is a continual supply of taxis.

2.1.3 The Taxi Market Condition Assessment Matrix applied to both 2016 and 2019 shows little difference in market conditions. The evidence suggests that the continuation of the moratorium on the issue of new taxi licences has not disadvantaged passengers.

2.1.4 The public attitude survey showed an overall lack of understanding of the difference between taxis and private hire vehicles. There was an improvement in the understanding of the fare structure and a greater consensus on improvements when compared to the 2016 study.

2.1.5 There was little evidence of insufficient supply of licensed vehicles; furthermore 'lack of taxis' was not cited by any respondent when asked why they do not use licensed vehicles more often.

2.2 Part 2: Driver and Proprietor Attitude Survey

2.2.1 The Driver and Proprietor Attitude Survey showed that taxi drivers generally work longer hours than private hire vehicle drivers. The number of hours that taxi drivers work has increased since 2016 whilst PHV driver hours have remained similar.

2.2.2 Both taxi and private hire vehicle drivers report waits longer than 15 minutes on average before getting a fare, regardless of time of day. One driver was cited as saying that they and a number of colleagues have waited in excess of 2 hours.

2.2.3 Many taxi drivers and proprietors thought that there were not enough taxi ranks in Cardiff, a smaller number stated that the current ranks need to have their capacity expanded. Private hire vehicle drivers were more likely to report feeling there were enough taxi ranks in Cardiff. Castle Street, Wood Street, and the area around Central Station were the most cited locations for additional or extended ranks.

2.2.4 Most drivers and proprietors felt that there were too many taxis and private hire vehicles when compared to the demand, and the majority of respondents feel that the cap should be kept in place. The view of drivers and proprietors is that the moratorium is not having a detrimental effect on the service.

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. Sixteen 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 Respondents used a mixture of taxis and PHVs frequently, with around half the stakeholders booking for other people or for their own business travel. 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.

2.3.3 There was an even mix of stakeholders that used taxis and PHVs and general vehicle standards were comparable for taxis and private hire vehicles. The main difference was internal cleanliness, with fewer respondents stating taxis are good for internal cleanliness compared to private hire vehicles.

2.3.4 Two licensed operators responded to the online survey. Both operators have taxis and PHVs in their fleet of vehicles and most of their work is telephone booking. Both operators felt that there were too many taxis on the road when compared to 2016. They both shared the opinion that the vehicle quality requirements and enforcement levels were not strict enough

and suggested improvements were; national or regional powers for enforcement officers, and more enforcement of vehicles based out of town plying for trade.

2.4 Level of Licensed Vehicle Supply

2.4.1 There is a consensus across all surveys and reports that the number of taxis operating within Cardiff is either adequate or too high. There is no evidence to indicate significant unmet demand or that passengers 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 and 2016. In fact, the results of the various studies and the analysis of current market conditions indicate 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 vehicle quality standards and driver behaviour.

2.5.2 There is some concern that there are too few taxi ranks in the city and that the capacity of some existing ranks needs to increase.

2.5.3 Some of these themes were supported by those outside the trade, with recommendations from the public on improving driver and vehicle regulation, and stakeholder comments on improving customer service and concern over taxi cleanliness.

3 Recommendations

3 Recommendations

3.1 Key Recommendation

3.1.1 **Taxi Licence Moratorium:** The Key recommendation of the study is that Cardiff Council should maintain the current moratorium on the issue of new 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 showed issues within three key areas that should be considered more closely. These themes are very similar to the improvements picked up on in the 2016 study, suggesting they are key issues for the industry in Cardiff.

Enforcement

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

- Vehicle Standards;
- Driver Regulation; and
- Non-Cardiff vehicles operating within Cardiff.

Driver and Vehicle Regulation

3.2.3 There was a common theme that customer service from drivers could be improved; this can be achieved with more stringent driver regulation enforcement or through improvements to driver training across the board to ensure that all drivers are operating at a similar level. Addressing this would be beneficial for both passengers and drivers.

3.2.4 As mentioned above there is a concern over vehicles from outside Cardiff operating within the city, and whether all vehicles are achieving the same standard of quality. Cardiff Council does not currently have the required enforcement powers to address issues related to drivers or vehicles licensed by other local authorities. This is an issue that has been raised with the Welsh Government during their consultation on licensing law reform.

Taxi Ranks

3.2.5 There is a common agreement that some areas of the city need new ranks and that existing ranks need to have their capacity expanded to accommodate more vehicles. These areas were the most cited for new or extended ranks:

- Castle Street;
- Wood Street;
- Central Station; and
- Cardiff Bay.

3.3 Communication with the Trade

3.3.1 In order to 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 Cardiff Licensed Driver's Forum. 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.