Cardiff Taxi Licensing Study 2016

Part 3: Operator and Stakeholder Attitude Survey

Cardiff Council

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

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

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

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

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

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

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

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

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

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

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

1 Introduction

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1.1 Background

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

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

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

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

1.2 Study Objectives

1.2.1 The main objectives of the study are as follows:

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

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

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1.3 Overview and methodological approach

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

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

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

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

1.4 Report Structure

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

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

2 Stakeholder Response Findings

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2.1 Questionnaire structure

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

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

2.2 Stakeholder profile

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

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

Table 2.1 – Stakeholder profile by organisation type

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

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

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

[3] Multiple responses allowed

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

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

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

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

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

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

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

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

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

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

'Differing standards of maintenance and driver skill.'

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

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

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

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

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

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

Table 2.4 – Rating for Taxis on aspects of customer service

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

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

Table 2.5 – Rating for PHVs on aspects of customer service

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

3 Operator Response Findings

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3.1 Questionnaire Structure

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

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

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

3.2 Operator Findings

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

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

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

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

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

Table 3.1- Customer type by operator interviewed

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

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

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

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

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

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

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

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

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

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

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

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

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

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

4 Summary

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4.1 Summary

Stakeholders

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

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

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

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

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

Operators

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

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

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

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

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

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

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