



Cardiff Taxi Licensing Study 2019

Part 2: Driver and Proprietor Attitude Survey

Cardiff Council

30 September 2019

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

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Cardiff Taxi Study 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 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	<ul style="list-style-type: none"> • Taxi rank observation survey • Public attitude questionnaire
Cardiff Taxi Licensing Study 2019: Part 2: Driver and Proprietor Attitude Survey	<ul style="list-style-type: none"> • Licensed driver questionnaire • Vehicle proprietor questionnaire
Cardiff Taxi Licensing Study 2019: Part 3: Operator and Stakeholder Attitude Survey	<ul style="list-style-type: none"> • Stakeholder online questionnaire • Operator online questionnaire
Cardiff Taxi Licensing Study 2019: Part 4: Summary Report	<ul style="list-style-type: none"> • Summary of the above surveys

- E.6 This report is the Driver and Proprietor Attitude Survey which analyses two of the six surveys which have taken place; driver questionnaires and proprietor questionnaires. The data collected from these surveys has been analysed to determine views on the current level of service and market conditions in Cardiff. The key findings are given below:
- E.7 The 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 feeling 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 Guidance¹, a new study is required at a maximum interval of three years when a cap is in place. A new study is now due.
- 1.1.3 AECOM has been commissioned by CC to undertake this study, comprising of analysis of taxi activity in the city centre, and surveys to establish the attitudes of the public, trade, and key stakeholders. The study has been approached with consideration to the DfT's Best Practice Guidance throughout.
- 1.1.4 The term 'Taxi' is commonly used to refer to both Hackney Carriages and Private Hire Vehicles (PHVs). However, for clarification, in this report the term 'Taxi' is used to refer to Hackney Carriages in line with the Law Commission report titled 'Taxi and Private Hire Services'². Where the report includes analysis that refers to PHVs, this will be clearly stated.

1.2 Study Objectives

- 1.2.1 The main objectives of the study are as follows:
- To identify the current level of demand for taxis within Cardiff;
 - To assess whether the supply of taxis matches the demand;
 - To better understand the operations of taxis and private hire vehicles in and around Cardiff; and
 - To identify areas of the service that could be improved.
- 1.2.2 In order to meet these objectives six different surveys have been undertaken. These surveys are described in three separate reports, with one overriding report summarising all the information and drawing the key conclusions and making recommendations. The four reports are listed below:

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- 1.2.3 This report is the Driver and Proprietor Attitude Survey which analyses two of the six surveys which have taken place; licensed driver questionnaires and vehicle proprietor questionnaires. The data collected from these surveys has been analysed to determine views on the current level of service and market conditions in Cardiff.

¹ <https://www.gov.uk/government/publications/taxi-and-private-hire-vehicle-licensing-best-practice-guidance>

² <https://www.gov.uk/government/publications/taxi-and-private-hire-services>

1.3 Report Structure

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

- Section 2 sets out the study methodology, 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:

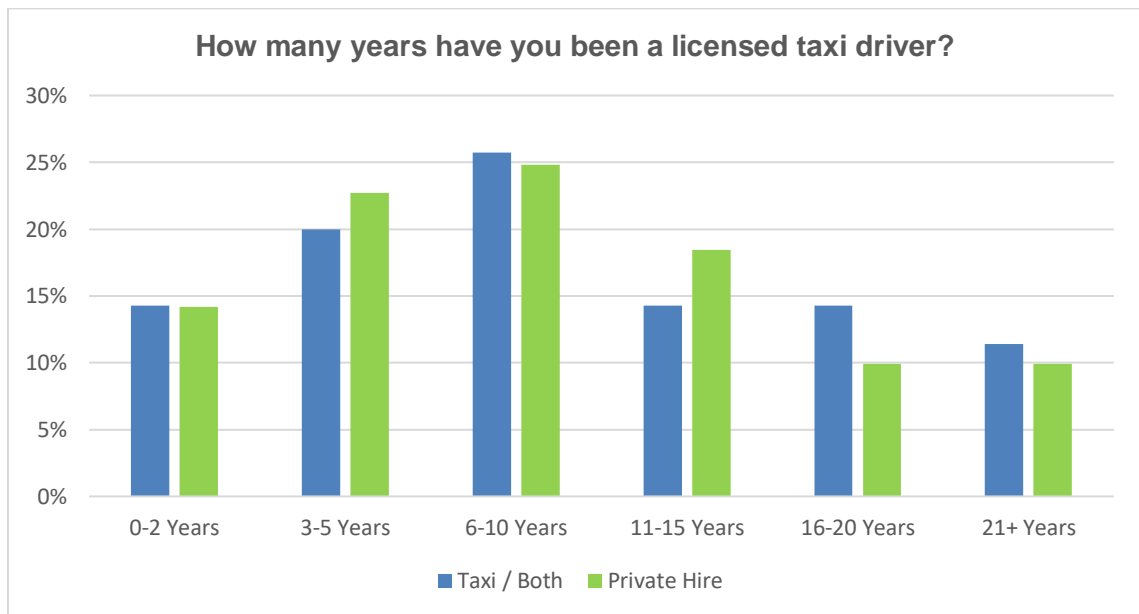
3.2 About You
3.3 About Your Vehicle
3.4 About Your Business

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.

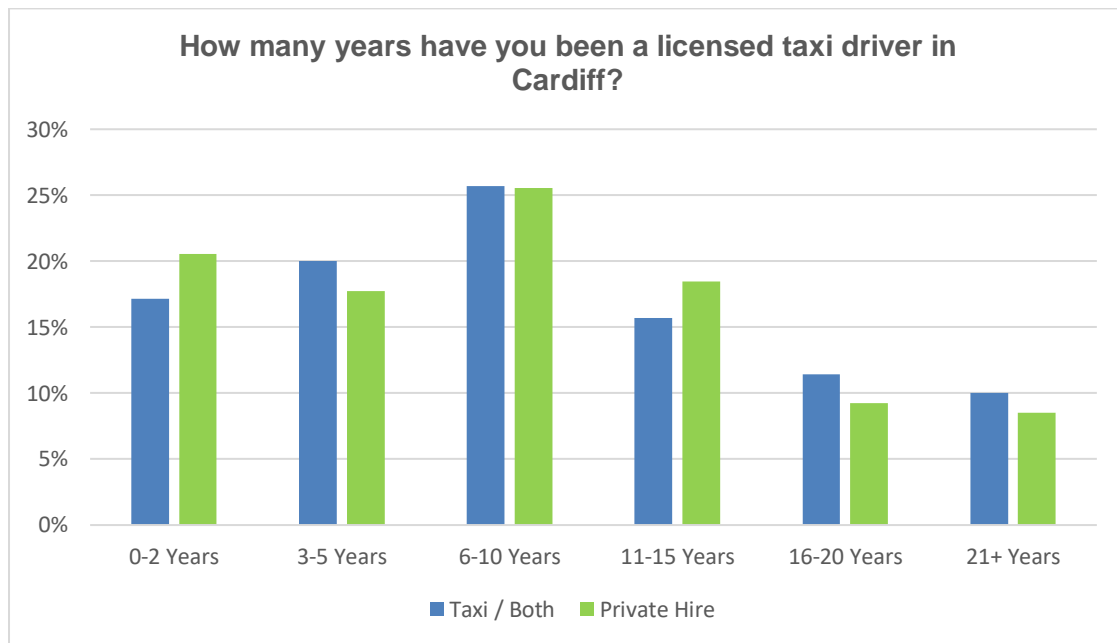
Figure 3.1 - Length of Service



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.

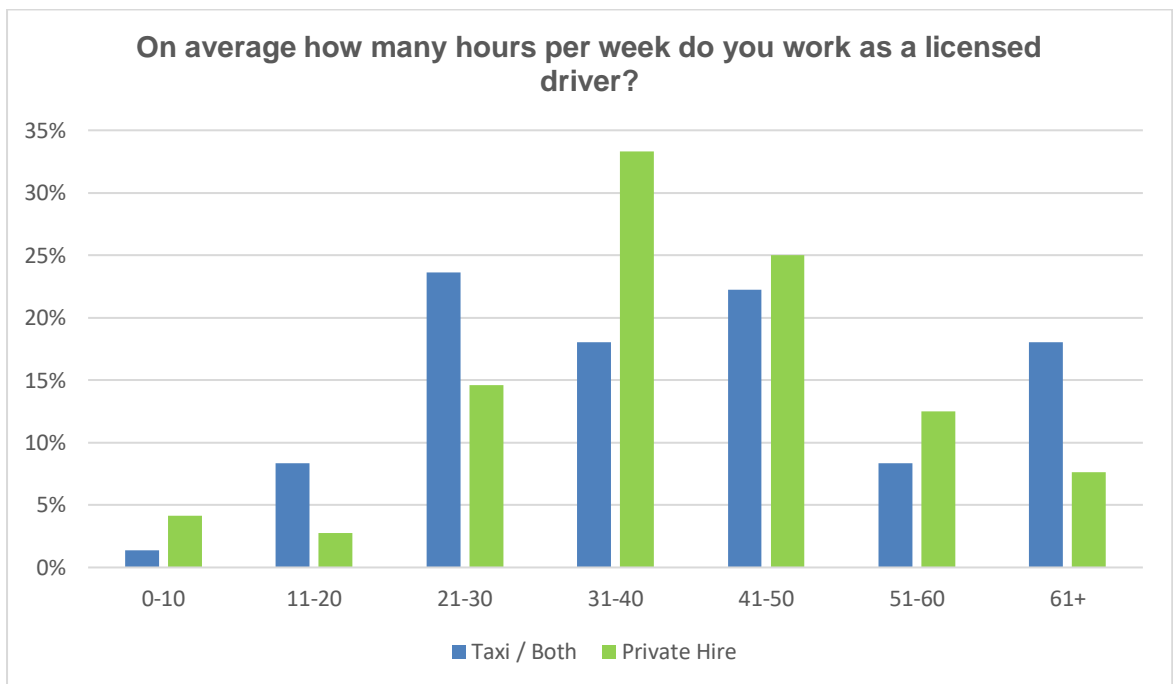
Table 3.2 – Driver Qualifications

	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.

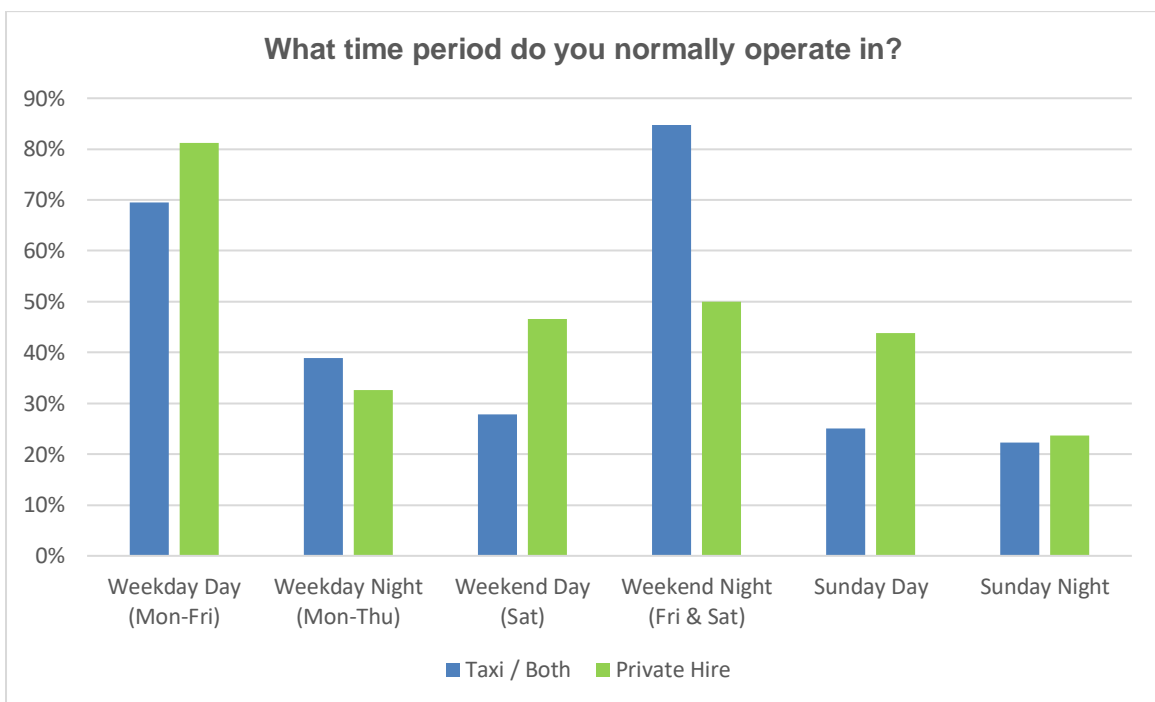
Figure 3.3 – Hours worked in a week



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

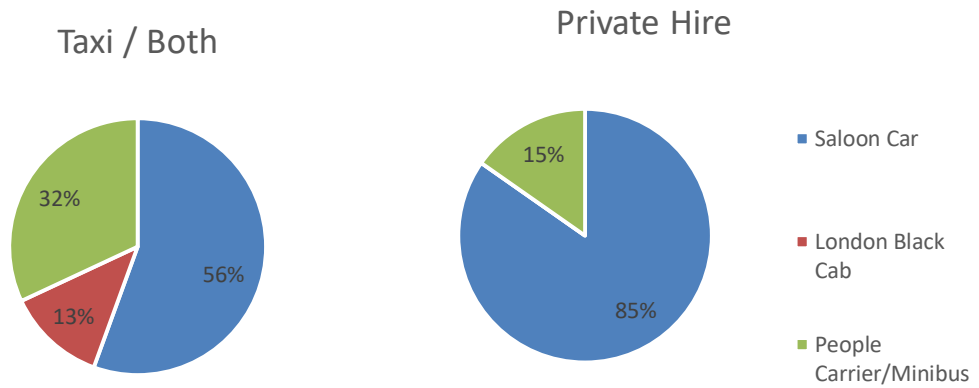


Base: 216

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				I never work at this time
	<5 mins	5-10 mins	10-15 mins	>15 mins	
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				I never work at this time
	<5 mins	5-10 mins	10-15 mins	>15 mins	
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

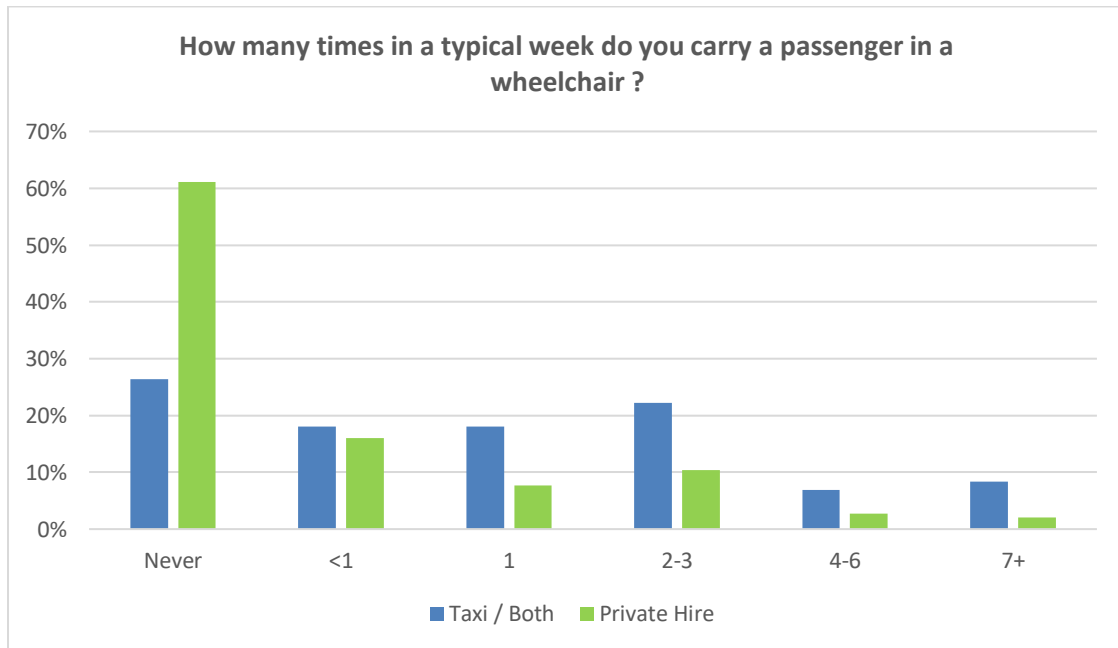


Table 3.8 – Wheelchair accessibility and carrying wheelchair users

	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, whilst 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.

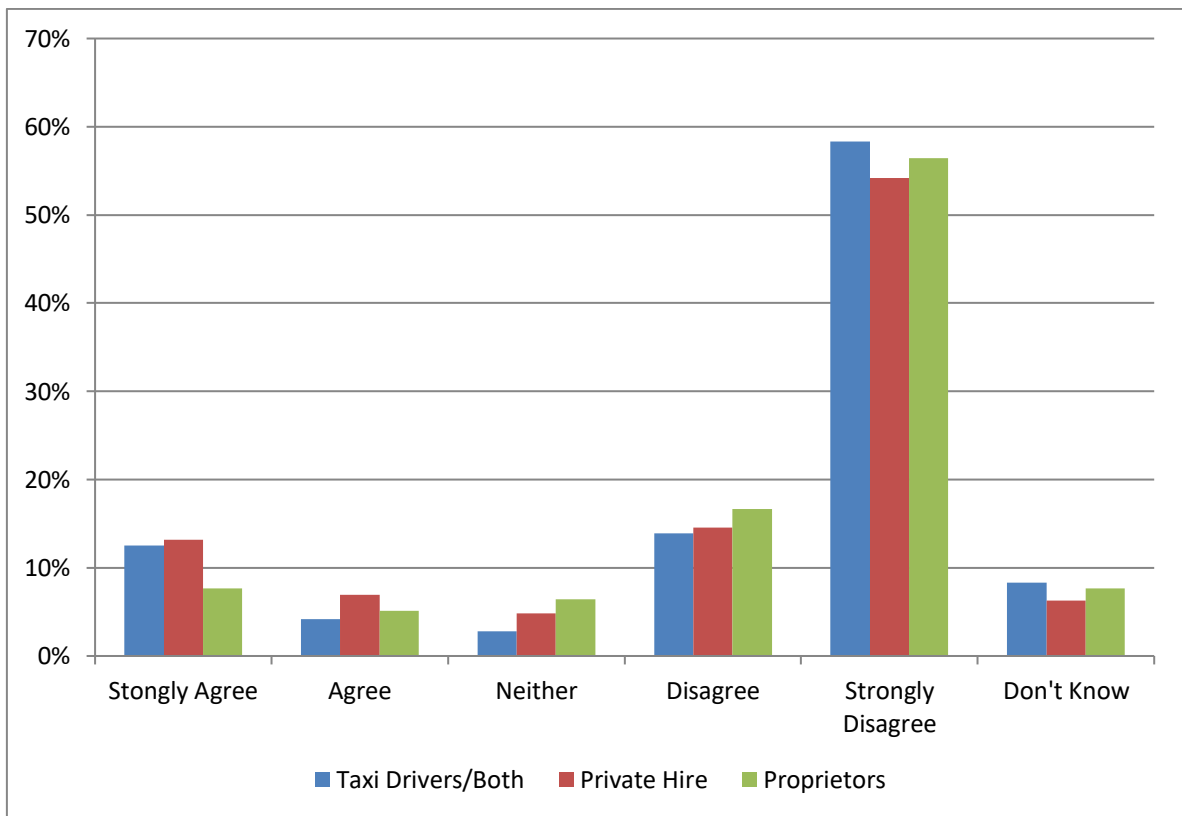
Table 5.1 – Do you think there are enough taxis to meet demand in Cardiff?

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.

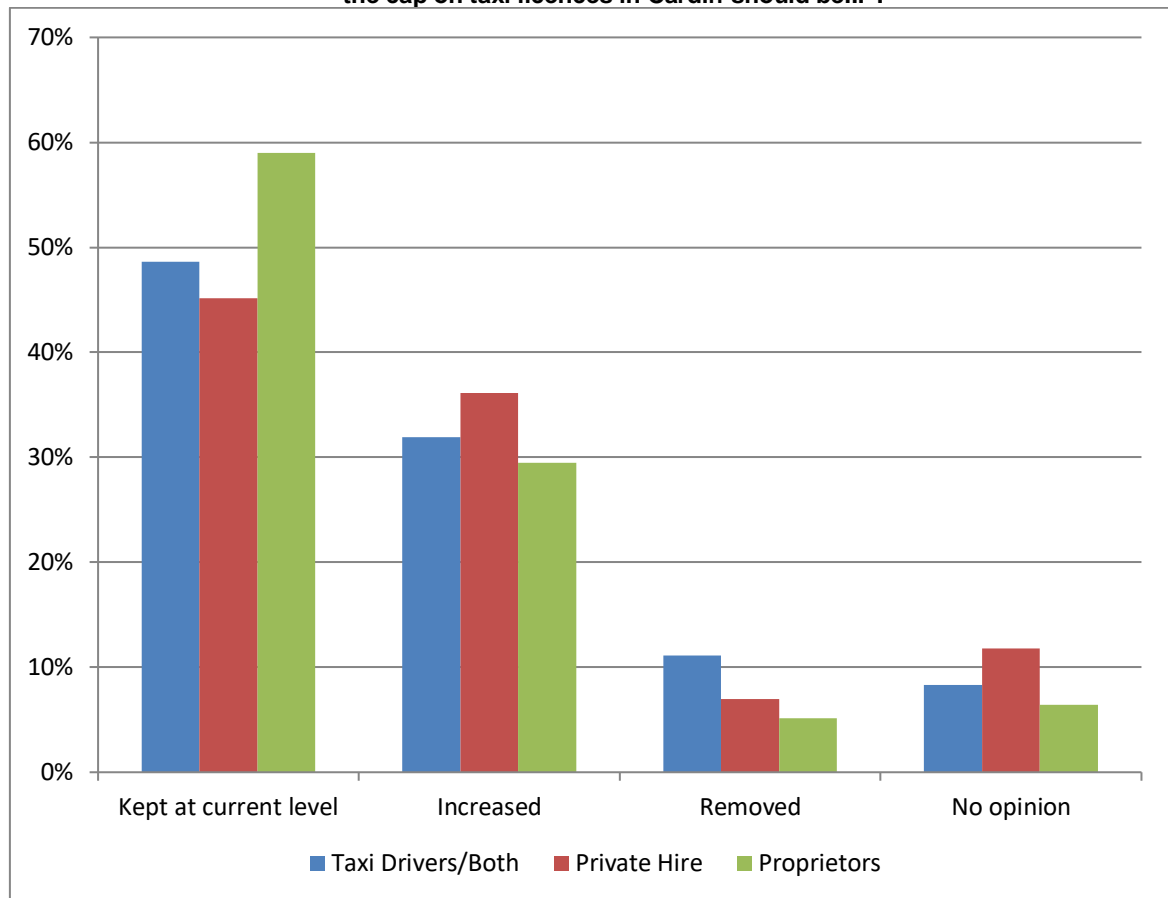
**Figure 5.1 – Level of agreement with the statement:
‘the cap on taxi licences in Cardiff has reduced the availability of taxis.’**



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.

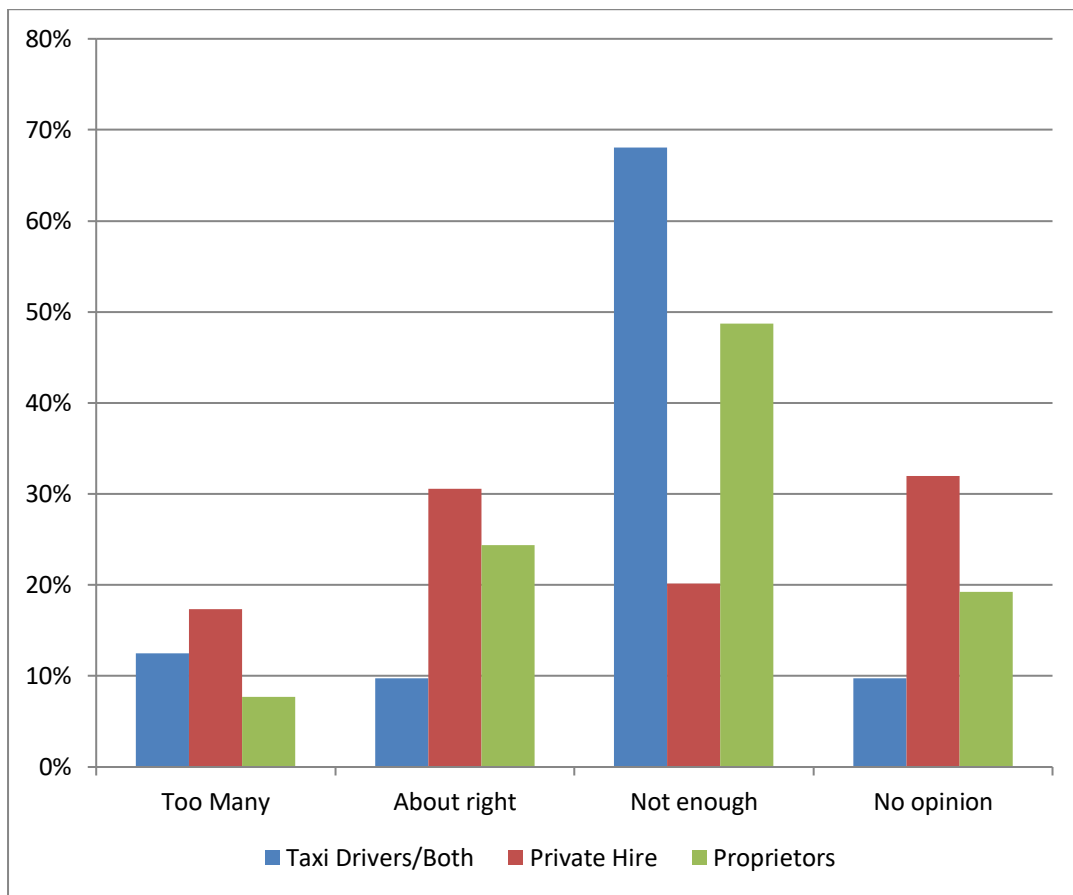
**Figure 5.2 – Level of agreement with the statement:
“the cap on taxi licences in Cardiff should be...”.**



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.

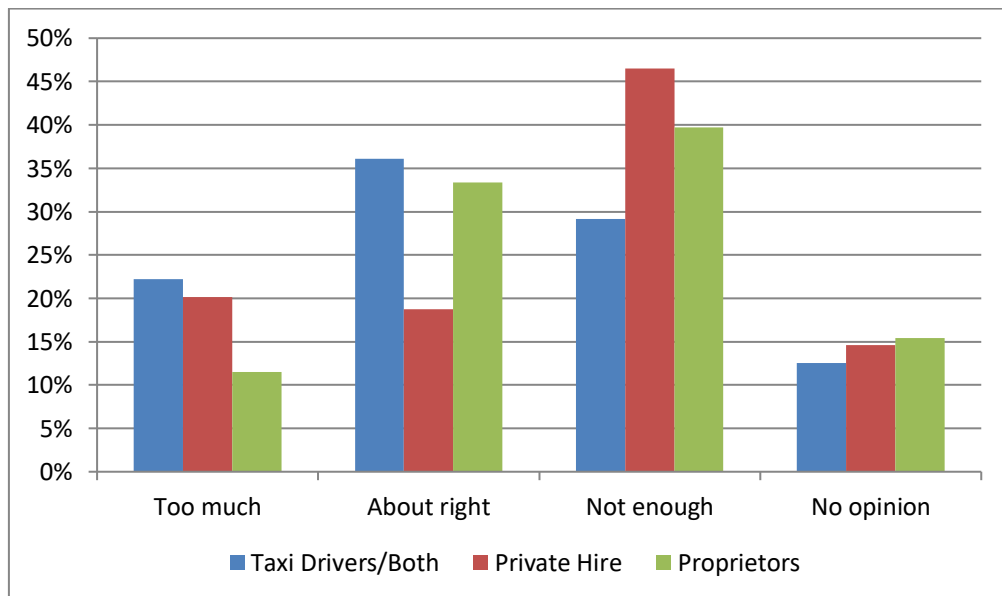
5.1.8 For comparison, the 2016 study asked for suggested new ranks with the top three listed being Castle Street, Wood Street and Central Station. Results would suggest that these areas are still currently under-served in terms of taxi rank locations/capacities as these three locations remain in the 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



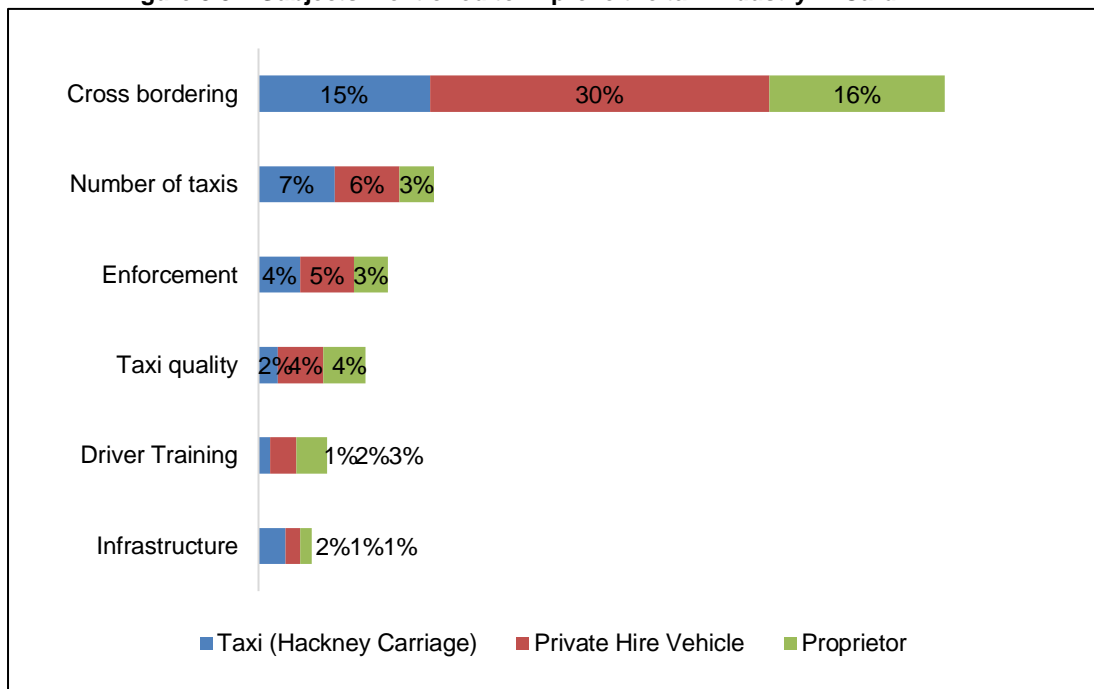
Base: 72 Taxi Drivers; 144 Private Hire Drivers; 78 Proprietors

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)
- | | | | |
|---|-------------------------------|-------------------------------|-------------------------------|
| BTLC Level 2 (Transporting Passengers by Taxi and Private Hire) | <input type="checkbox"/> Q4.1 | Disability Awareness Training | <input type="checkbox"/> Q4.2 |
| NVQ Level 2 (Road Passenger Vehicle Driving) | <input type="checkbox"/> Q4.3 | Other Qualification | <input type="checkbox"/> 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) | <input type="checkbox"/> Q6.1 |
| Weekday Nighttime (Mon-Thu, 19:00-07:00) | <input type="checkbox"/> Q6.2 |
| Weekend Daytime (Sat, 07:00-19:00) | <input type="checkbox"/> Q6.3 |
| Weekend Nighttime (Fri and Sat, 19:00-07:00) | <input type="checkbox"/> Q6.4 |
| Sunday Daytime (Sun, 07:00-19:00) | <input type="checkbox"/> Q6.5 |
| Sunday Nighttime (Sun, 19:00-07:00) | <input type="checkbox"/> 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 electric?
(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 time
Weekday Daytime (Mon-Fri, 07:00-19:00)	<input type="checkbox"/> Q18.1	<input type="checkbox"/> Q18.2	<input type="checkbox"/> Q18.3	<input type="checkbox"/> Q18.4	<input type="checkbox"/> Q18.5
Weekday Nighttime (Mon-Thu, 19:00-07:00)	<input type="checkbox"/> Q18.6	<input type="checkbox"/> Q18.7	<input type="checkbox"/> Q18.8	<input type="checkbox"/> Q18.9	<input type="checkbox"/> Q18.10
Weekend Daytime (Sat, 07:00-19:00)	<input type="checkbox"/> Q18.11	<input type="checkbox"/> Q18.12	<input type="checkbox"/> Q18.13	<input type="checkbox"/> Q18.14	<input type="checkbox"/> Q18.15
Weekend Nighttime (Fri and Sat, 19:00-07:00)	<input type="checkbox"/> Q18.16	<input type="checkbox"/> Q18.17	<input type="checkbox"/> Q18.18	<input type="checkbox"/> Q18.19	<input type="checkbox"/> Q18.20
Sunday Daytime (Sun, 07:00-19:00)	<input type="checkbox"/> Q18.21	<input type="checkbox"/> Q18.22	<input type="checkbox"/> Q18.23	<input type="checkbox"/> Q18.24	<input type="checkbox"/> Q18.25
Sunday Nighttime (Sun, 19:00-07:00)	<input type="checkbox"/> Q18.26	<input type="checkbox"/> Q18.27	<input type="checkbox"/> Q18.28	<input type="checkbox"/> Q18.29	<input type="checkbox"/> Q18.30

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	<input type="checkbox"/> Q2.11	<input type="checkbox"/> Q2.12	<input type="checkbox"/> Q2.13	<input type="checkbox"/> Q2.14
Private Hire Vehicles	<input type="checkbox"/> Q2.15	<input type="checkbox"/> Q2.16	<input type="checkbox"/> Q2.17	<input type="checkbox"/> Q2.18

22. Please indicate your level of agreement with the following statement:

The cap on Taxi licences in Cardiff has reduced the availability of Taxis.
(Please tick one box only)

Strongly Agree	<input type="checkbox"/> Q22.1	Agree	<input type="checkbox"/> Q22.2	Neither	<input type="checkbox"/> Q22.3
Disagree	<input type="checkbox"/> Q22.4	Strongly Disagree	<input type="checkbox"/> Q22.5	Don't Know	<input type="checkbox"/> Q22.6

23. Please indicate which of the following statements you most agree with:

The cap on Taxi licences in Cardiff should be...
(Please tick one box only)

Kept at current level	<input type="checkbox"/> Q23.1	Increased	<input type="checkbox"/> Q23.2	Removed	<input type="checkbox"/> Q23.3
				No opinion	<input type="checkbox"/> Q23.4

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

(Please tick one box only)

Too many	<input type="checkbox"/> Q24.1	About right	<input type="checkbox"/> Q24.2	Not enough	<input type="checkbox"/> Q24.3
				No opinion	<input type="checkbox"/> Q24.4

24b. If you answered 'Not enough', where would you like to see new ranks created in Cardiff?

(Please specify a maximum of 3 locations)

..... Q24.5

..... Q24.6

..... Q24.7

25. What is your view on the current level of enforcement on licensed vehicles in Cardiff?

(Please tick one box only)

Too much	<input type="checkbox"/> Q25.1	About right	<input type="checkbox"/> Q25.2	Not enough	<input type="checkbox"/> Q25.3
				No opinion	<input type="checkbox"/> Q25.4

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 or 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 your 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, hybrid 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	<input type="checkbox"/> Q9.1	<input type="checkbox"/> Q9.2	<input type="checkbox"/> Q9.3	<input type="checkbox"/> Q9.4
Private Hire Vehicles	<input type="checkbox"/> Q9.5	<input type="checkbox"/> Q9.6	<input type="checkbox"/> Q9.7	<input type="checkbox"/> Q9.8

10. Please indicate your level of agreement with the following statement:

The cap on Taxi licences in Cardiff has reduced the availability of Taxis.

(Please tick one box only)

Strongly Agree <input type="checkbox"/> Q10.1	Agree <input type="checkbox"/> Q10.2	Neither <input type="checkbox"/> Q10.3
Disagree <input type="checkbox"/> Q10.4	Strongly Disagree <input type="checkbox"/> Q10.5	Don't Know <input type="checkbox"/> Q10.6

11. Please indicate which of the following statements you most agree with:

The cap on Taxi licences in Cardiff should be...

(Please tick one box only)

Kept at current level <input type="checkbox"/> Q11.1	Increased <input type="checkbox"/> Q11.2	Removed <input type="checkbox"/> Q11.3
		No opinion <input type="checkbox"/> Q11.4

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

(Please tick one box only)

Too many <input type="checkbox"/> Q12.1	About right <input type="checkbox"/> Q12.2	Not enough <input type="checkbox"/> Q12.3
		No opinion <input type="checkbox"/> Q12.4

12b. If you answered 'Not enough', where would you like to see new ranks created in Cardiff?

(Please specify a maximum of 3 locations)

..... Q12.5

..... Q12.6

..... Q12.7

13. What is your view on the current level of enforcement on licensed vehicles in Cardiff?

(Please tick one box only)

Too much <input type="checkbox"/> Q13.1	About right <input type="checkbox"/> Q13.2	Not enough <input type="checkbox"/> Q13.3
		No opinion <input type="checkbox"/> Q13.4

