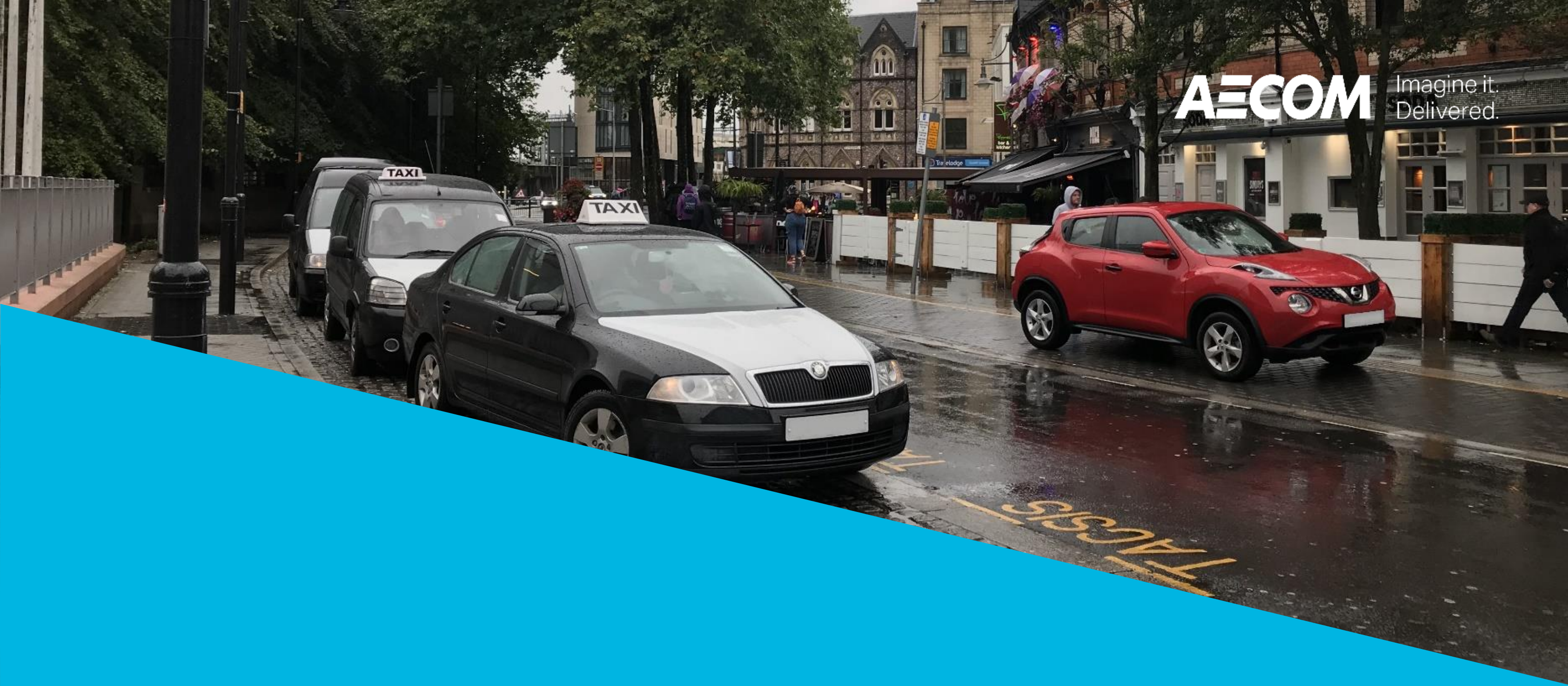

Cardiff Taxi Licensing Study 2019

Part 4: Summary Report

Cardiff Council

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

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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 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.