



Plymouth City Council
Taxi unmet demand survey

Final Report

July 2019

Executive Summary

This Taxi unmet demand survey has been undertaken on behalf of Plymouth City Council following the guidance of the April 2010 DfT Best Practice Guidance document, and all relevant case history in regard to unmet demand. This Executive Summary draws together key points from the main report that are needed to allow a committee to determine from the facts presented their current position in regard to the policy of limiting hackney carriage vehicle licences according to Section 16 of the 1985 Transport Act. It is a summary of the main report which follows and should not be relied upon solely to justify any decisions of a committee but must be read in conjunction with the full report below.

The survey saw most information gathered in November and December 2018 although driver and key stakeholders were in early 2019. This is an essential repeat on the BPG suggested frequency of every three years which has provided a timely update of the present situation. The study demonstrates the impact of national trends and Plymouth specific concentration of some of these on the licensed vehicle trade.

Overall the number of Plymouth-based licensed vehicles – both hackney and private hire - is reducing in line with demand falling, despite significant trade attempts to market their services (which has seen success). This means that rank usage has only fallen by a relatively low 6% in three years (compared to other cities that have seen much more decline in a similar period).

Night time economy flows have reduced but have also become much more pronounced. Rank demand has focussed with only three ranks now having more than 10% of weekly demand, although two ranks have seen significant increase arising from re-design in one case which demonstrates that care must be taken in revising ranks to ensure the public can benefit from the vehicles on offer.

The observed good service provided appeared to be from a much smaller fleet than in the previous survey. This means spare capacity is much higher and gives the option to apply the Birmingham model of a moratorium on new plates rather than a fixed limit.

Wheel chair usage of the hackney carriage fleet is very high and this fact needs to be applauded and advertised further.

Consistent with the rank observations, people told us they now used licensed vehicles less, and also less frequently, although the proportion of trips undertaken by hackney carriage had actually increased. Unlike many Cities, rank-based hires were the most popular means of getting a vehicle, although apps had risen from seeing little use three years ago to 10% now.

Phoned for demand principally goes to two large private hire operators, but the next largest phoned demand is for the hackney carriage radio network, which appears to have increased its share of demand. The only counter fact was an increased level of people saying they could not remember when they last used a hackney carriage. This tends to suggest that peoples normal apprehension of using hackney carriages is overcome when people use them, which would explain the transfers. That reinforces the fact that people get a great service from Plymouth hackney carriages, which again needs to be shared widely.

Some minor issues were raised by key stakeholders that are detailed in the report but which should not take away from the very positive overall attitude from these groups to the service provided.

Trade response was better than ever. It demonstrated very high levels of experience, more so on the hackney carriage side. Support for the limit on vehicle numbers was increased. Evidence was provided that there are many vehicles registered but unused mainly arising from the fall in the number of drivers wanting to rent vehicles.

The unmet demand index has increased but remains less than half the level that would be seen to be 'significant' and requiring more plates. The issue principally appears to arise from more vehicles servicing passengers using apps and by phone, a factor common with other Cities at this time. This effectively reduces availability at ranks but customer experience is enhanced through the ability to get a vehicle and know it is coming.

Overall the licensed vehicle trade, and specifically the hackney carriage trade, has responded well to challenging circumstances.

This needs to be demonstrated as valuable by retention of the current limit, and preferably application of a moratorium on new plates that would ensure those currently serving demand can benefit from the results of any increased demand that arises from marketing. There is plenty of spare capacity at present to allow this policy to be put in place although numbers of both hackney carriage and private hire plates should be kept under monitor to ensure no shortage appeared in the unlikely event of any upturn in the economy.

Consideration is needed to revising night tariffs to encourage some daytime drivers to switch to servicing the now very different pattern of night demand. There also needs to be serious consideration of the issue of driver exemptions for hackney carriage vehicles. Finally, this report needs to be widely shared around other parts of the City Council to ensure all that have impact on licensed vehicle services are aware of their value to the economy of the City and their flexibility in providing important transport service.



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1 General introduction and background

Plymouth City Council is responsible for the licensing of hackney carriage and private hire vehicles operating within the Council area and is the licensing authority for this complete area. Further details of the local application of Section 16 of the 1985 Transport Act with regard to limiting hackney carriage vehicle numbers is provided in further Chapters of this report. Hackney carriage vehicle licences are the only part of licensing where such a stipulation occurs and there is no legal means by which either private hire vehicle numbers, private hire or hackney carriage driver numbers, or the number of private hire operators can be limited.

This review of current policy is based on the Best Practice Guidance produced by the Department for Transport in April 2010 (BPG). It seeks to provide information to the licensing authority to meet section 16 of the Transport Act 1985 "that the grant of a hackney carriage vehicle licence may be refused if, but only if, the licensing authority is satisfied that there is no significant demand for the services of hackney carriages within its local area, which is unmet." This terminology is typically shortened to "no SUD".

Current hackney carriage, private hire and operator licensing is undertaken within the legal frameworks first set by the Town Polices Clause Act 1847 (TPCA), amended and supplemented by various following legislation including the Transport Act 1985, Section 16 in regard to hackney carriage vehicle limits, and by the Local Government Miscellaneous Provisions Act 1976 (LGMPA 1976) with reference to private hire vehicles and operations. This latter Act saw application of regulation to the then growing private hire sector which had not been previously part of the TPCA. Many of the aspects of these laws have been tested and refined by other more recent legislation and more importantly through case law. However, Plymouth remains unique in having its licensed vehicle legislation determined by the Plymouth City Council Act 1975 which principally covers provisions of the LGMPA 1976 which therefore does not apply in Plymouth.

Beyond legislation, the experience of the person in the street tends to see both hackney carriage and private hire vehicles both as 'taxis' – a term we will try for the sake of clarity to use only in its generic sense within the report. We will use the term 'licensed vehicle' to refer to both hackney carriage and private hire.

The legislation around licensed vehicles and their drivers has been the subject of many attempts at review. The limiting of hackney carriage vehicle numbers has been a particular concern as it is often considered to be a restrictive practice and against natural economic trends. The current BPG in fact says “most local licensing authorities do not impose quantity restrictions, the Department regards that as best practice”. The three most recent reviews were by the Office of Fair Trading in 2003, through the production of the BPG in 2010, and the Law Commission review which published its results in 2014. None of these resulted in any material change to the legislation involved in licensing.

At the time of writing this report an All-Party Parliamentary Group is considering taxi policy matters and has published their results. Most are very similar to those produced by the Law Commission. Other groups have provided comment about current taxi licensing policy, but the upshot remains no change in legislation from that already stated above. The Government has responded to this review and essentially accepted many of its recommendations with a consultation undertaken on various safety aspect improvements. The implementation from that consultation is awaited in the near future. However, it does not affect the sections of the BPG that are relied on to structure review of unmet demand (see more below)

With respect to the principal subject of this survey, local authorities retain the right to restrict the number of hackney carriage vehicle licences. The Law Commission conclusion included retention of the power to limit hackney carriage vehicle numbers but utilizing a public interest test determined by the Secretary of State. It also suggested the three-year horizon also be used for rank reviews and accessibility reviews. However, there is currently no expected date either for publication of the Government response to the Law Commission, we now assume the Government response to the APPG is indeed this response, see further information below.

A more recent restriction, often applied to areas where there is no ‘quantity’ control felt to exist per-se, is that of ‘quality control’. This is often a pseudonym for a restriction that any new hackney carriage vehicle licence must be for a wheel chair accessible vehicle, of various kinds as determined locally. In many places this implies a restricted number of saloon style hackney carriage licences are available, which often are given ‘grandfather’ rights to remain as saloon style. There is no such issue in Plymouth, where all hackney carriage vehicles have had to be fully wheel chair accessible for some while.



Within this quality restriction, there are various levels of strength of the types of vehicles allowed. The tightest restriction, now only retained by a few authorities only allows 'London' style wheel chair accessible vehicles, restricted to those with a 25-foot turning circle, and at the present time principally the LTI Tx, the Mercedes Vito special edition with steerable rear axle, and the Metrocab (no longer produced). Others allow a wider range of van style conversions in their wheel chair accessible fleet, whilst some go as far as also allowing rear-loading conversions. Given the additional price of these vehicles, this often implies a restriction on entry to the hackney carriage trade.

Whilst Plymouth does not have the tightest restriction on vehicle types that are accepted as wheel chair accessible, it does not have the most lenient view either, but does allow for a reasonably wide range of vehicle options for the trade, and therefore for customers to choose between, although this depends on where a specific vehicle chooses to ply for trade.

Some authorities do not allow vehicles which appear to be hackney carriage, i.e. mainly the London style vehicles, to be within the private hire fleet, whilst others do allow wheel chair vehicles. The most usual method of distinguishing between hackney carriages and private hire is a 'Taxi' roof sign on the vehicle, although again some areas do allow roof signs on private hire as long as they do not say 'Taxi', some turn those signs at right angles, whilst others apply liveries, mainly to hackney carriage fleets, but sometimes also to private hire fleets. This is the case in Plymouth although exceptions can be allowed.

After introduction of the 1985 Transport Act, Leeds University Institute for Transport Studies developed a tool by which unmet demand could be evaluated and a determination made if this was significant or not. The tool was taken forward and developed as more studies were undertaken. Over time this 'index of significance of unmet demand' (ISUD) became accepted as an industry standard tool to be used for this purpose. Some revisions have been made following the few but specific court cases where various parties have challenged the policy of retaining a limit.

Some of the application has differed between Scottish and English authority's. This is mainly due to some court cases in Scotland taking interpretation of the duty of the licensing authority further than is usual in England and Wales, requiring current knowledge of the status of unmet demand at all times, rather than just at the snap-shot taken every three years. However, the three year survey horizon has become generally accepted given the advice of the BPG and most locations that review regularly do within that timescale.

The DfT asked in writing in 2004 for all licensing authorities with quantity restrictions to review them, publish their justification by March 2005, and then review at least every three years since then. In due course, this led to a summary of the government guidance which was last updated in England and Wales in 2010 (but more recently in Scotland).

The BPG in 2010 also provided additional suggestions of how these surveys should be undertaken, albeit in general but fairly extensive terms. A key encouragement within the BPG is that "an interval of three years is commonly regarded as the maximum reasonable period between surveys". BPG suggests key points in consideration are passenger waiting times at ranks, for street hailing and telephone bookings, latent and peaked demand, wide consultation and publication of "all the evidence gathered".

The most recent changes in legislation regarding licensed vehicles have been enactment of the parts of the Equality Act related to guidance dogs (sections 168 to 171, enacted in October 2010), the two clauses of the Deregulation Act which were successful in proceeding, relating to length of period each license covers and to allowing operators to transfer work across borders (enacted in October 2015), and most recently enactment of Sections 165 and 167 of the Equality Act, albeit on a permissive basis (see below).

In November 2016, the DfT undertook a consultation regarding enacting Sections 167 and 165 of the Equality Act. These allow for all vehicles capable of carrying a wheel chair to be placed on a list by the local council (section 167). Any driver using a vehicle on this list then has a duty under section 165 to:

- Carry the passenger while in the wheel chair
- Not make any additional charge for doing so
- If the passenger chooses to sit in a passenger seat to carry the wheel chair
- To take such steps as are necessary to ensure that the passenger is carried in safety and reasonable comfort
- To give the passenger such mobility assistance as is reasonably required

This was enacted from April 2017. There remains no confirmation of any timetable for instigating either the remainder of the Equality Act or the Law Commission recommendations, or for the update of the BPG.

In respect to case law impinging on unmet demand, the two most recent cases were in 1987 and 2002. The first case (R v Great Yarmouth) concluded authorities must consider the view of significant unmet demand as a whole, not condescending to detailed consideration of the position in every limited area, i.e. to consider significance of unmet demand over the area as a whole.

R v Castle Point considered the issue of latent, or preferably termed, suppressed demand consideration. This clarified that this element relates only to the element which is measurable. Measurable suppressed demand includes inappropriately met demand (taken by private hire vehicles in situations legally hackney carriage opportunities) or those forced to use less satisfactory methods to get home (principally walking, i.e. those observed to walk away from rank locations).

In general, industry standards suggest (but specifically do not mandate in any way) that the determination of conclusions about significance of unmet demand should take into account the practicability of improving the standard of service through the increase of supply of vehicles. It is also felt important to have consistent treatment of authorities as well as for the same authority over time, although apart from the general guidance of the BPG there is no clear stipulations as to what this means in reality, and certainly no mandatory nor significant court guidance in this regard.

During September 2018 the All-Party Parliamentary Group on taxis produced its long-awaited Final Report. There was a generally accepted call for revision to taxi licensing legislation and practice, including encouragement for local authorities to move towards some of the practical suggestions made within the Report. However, the Report has no legislative backing and the key conclusion was that the Government needed to act firstly to revise the 2010 BPG but then to move to revisions to primary legislation as soon as practicable.

Despite some opposition from members of the group, the right to retain limits on hackney carriage vehicle numbers was supported, with many also supporting adding a tool which would allow private hire numbers to be limited where appropriate, given reasonable explanation of the expected public interest gains.

The Government response to this review was published in February 2019. It supported most of the views of the group, with the strongest disagreement regarding private hire vehicle number limits. With the response, the Government also launched a consultation related principally to ensuring improved safety for licensed vehicle passengers. This will lead to a partial revision of the Best Practice Guidance, but the full revision will not occur until the determinations from the consultation have been put in place and are established.

Other groups have provided comments giving their views about licensing matters, but the upshot remains no change in legislation from that already stated above.

A currently pressing impact is arising from the urgent need to take action on air quality. This has resulted in the Government considering establishing an all-UK database of licensed vehicles and some other items are included with the consultation being undertaken, some of which may have impacts on consideration of hackney carriage demand and unmet demand surveys.

In conclusion, the present legislation in England and Wales sees public fare-paying passenger carrying vehicles firstly split by passenger capacity. All vehicles able to carry nine or more passengers are dealt with under national public service vehicle licensing. Local licensing authorities only have jurisdiction over vehicles carrying eight or less passengers. Further, the jurisdiction focusses on the vehicles, drivers and operators but rarely extends to the physical infrastructure these use (principally ranks).

The vehicles are split between hackney carriages which are alone able to wait at ranks or pick up people in the streets without a booking, and private hire who can only be used with a booking made through an operator. If any passenger uses a private hire vehicle without such a properly made booking, they are not generally considered to be insured for their journey.

Drivers can either be split between ability to drive either hackney carriage or private hire, or be 'dual', allowed to drive either kind of vehicle. Whilst a private hire driver can only take bookings via an operator, with the 'triple-lock' applying that the vehicle, driver and operator must all be with the same authority, a hackney carriage driver can accept bookings on-street or by phone without the same stipulation required for private hire.

Recent legislation needing clarification has some operators believing they can use vehicles from any authority as long as they are legally licensed as private hire. At first, under the 'Stockton' case, this was hackney carriages operating as private hire in other areas (cross-border hiring). More recently, under the Deregulation Act, private hire companies are able to subcontract bookings to other companies in other areas if they are unable to fulfil their booking, but the interpretation of this has become quite wide.

The 'triple lock' licensing rule has also become accepted. A vehicle, driver and operator must all be under the same licensing authority to provide full protection to the passenger. However, it is also accepted that a customer can call any private hire company anywhere to provide their transport although many would not realise that if there was an issue it would be hard for a local authority to follow this up unless the triple lock was in place by the vehicle used and was for the area the customer contacted licensing.

Further, introduction of recent methods of obtaining vehicles, principally using 'apps' on mobile phones have also led to confusion as to how 'apps' usage sits with present legislation.

Whilst the APPG and the Government response to this do present some thoughts about understanding and reacting to the 'cross border hiring' issues, there is no clear conclusion in this regard at this time.

All these matters can impact on hackney carriage services, their usage, and therefore on unmet demand and its significance.





2 Local background and context

Key dates for this Taxi unmet demand survey for Plymouth are:

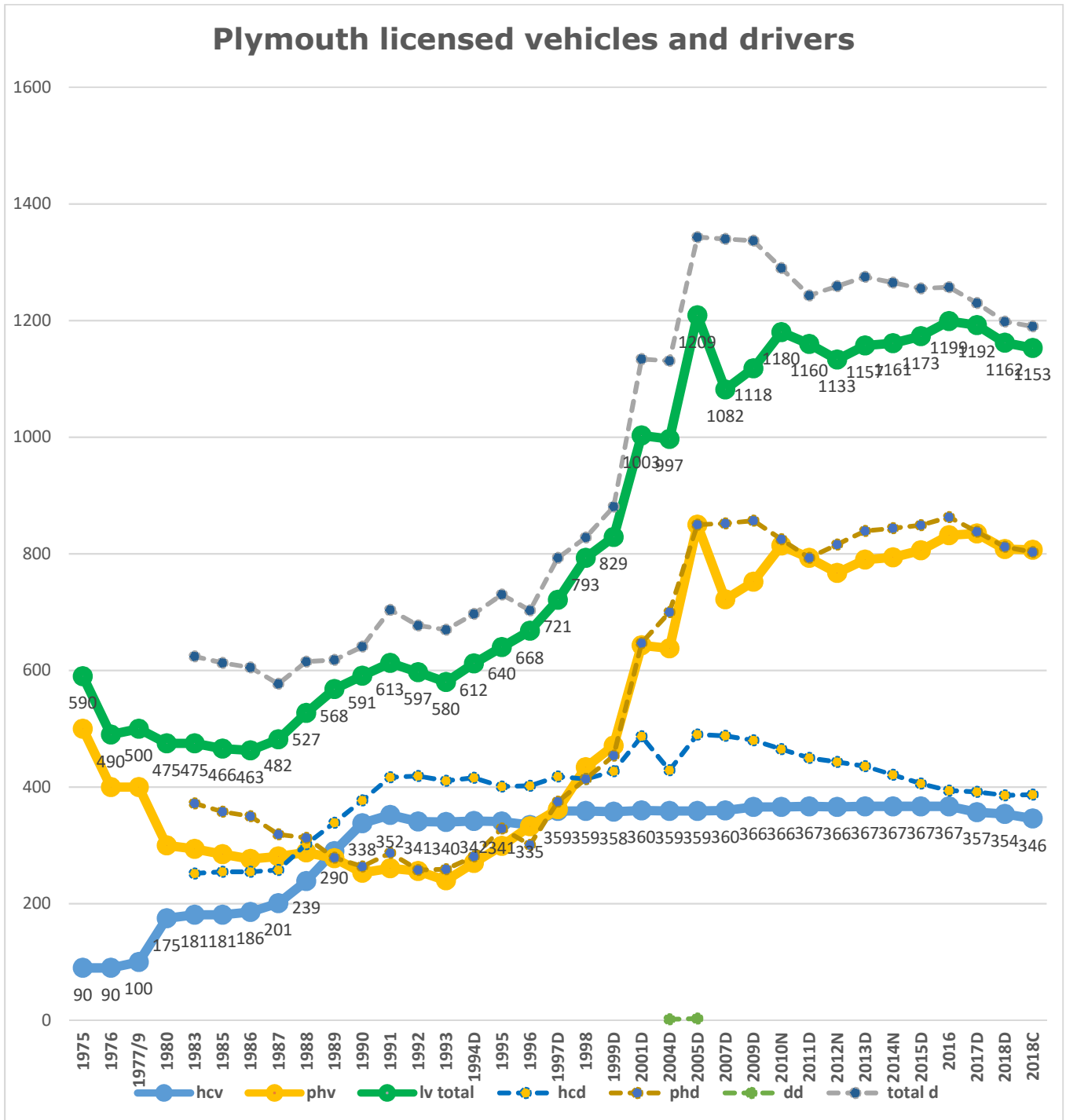
- appointed Licensed Vehicle Surveys and Assessment (LVSA) on 25th October 2018
- in accordance with our proposal of October 2018
- as confirmed during the inception meeting for the survey held on 31 October 2018
- this survey was carried out between November 2018 and March 2019
- On street pedestrian survey work occurred in November / December 2018
- the video rank observations occurred in early November 2018, in advance of the switching on of the Christmas lights in central Plymouth
- Licensed vehicle driver opinions and operating practices were obtained by an all-driver and key representative survey undertaken mainly within March 2019
- Key stakeholders were consulted throughout the period of the survey
- A draft of this Final Report was reviewed by the client during May/June 2019
- and reported to the appropriate Council committee

Plymouth is a unitary City Council. The authority has a current population of 266,900 using the 2018 estimates currently available from the 2011 census.

In terms of background council policy, Plymouth controls its own transport policy as well as its own highways, apart from the trunk route that passes through the City (A38). This nature of the authority means that rank provision is fully within the remit of the City council, albeit in a separate section to taxi licensing. It also has its own local Act which was a precursor to the LGMPA 1976 and which means that Act does not apply in Plymouth.

However, all licensing authorities have full powers over licensing the vehicles, drivers and operators serving people within their area. Plymouth has chosen to utilise its power to limit hackney carriage vehicle numbers, and as far as we are aware has done so since 1975 or earlier, and the authority relatively uniquely also has information about vehicle numbers back as far as that date.

By drawing together published statistics from both the Department for Transport (D) and the National Private Hire Association (N), supplemented by private information from the licensing authority records (C), recent trends in vehicle, driver and operator numbers can be observed. The detailed numbers supporting the picture below are provided in Appendix 1. Due to the comparative size, the operator figures are shown in the second picture.



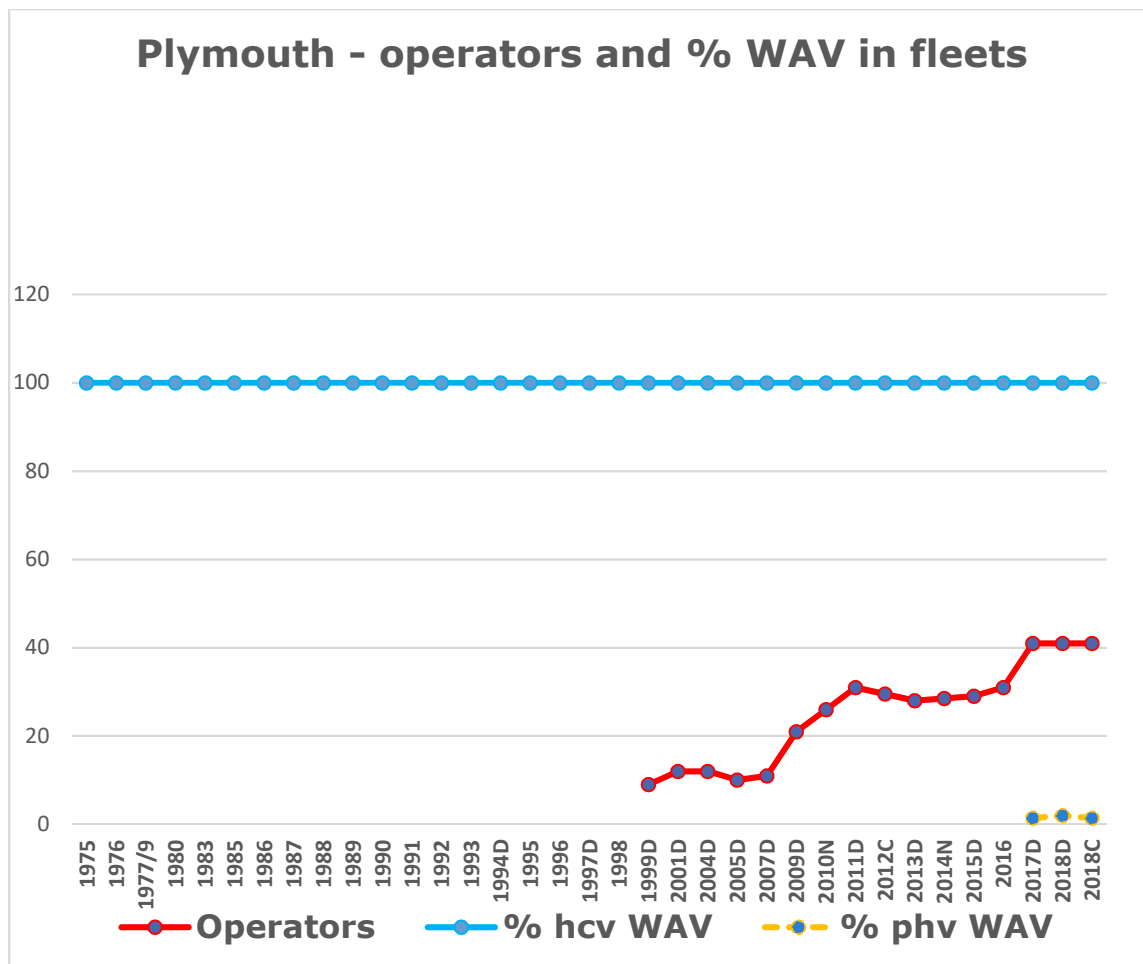
Licensing Statistics from 1994 to date

The statistics demonstrate that both hackney carriage and private hire, for vehicles and drivers, are seeing a continued slow decline in numbers, particularly since the result of the last survey undertaken. Even the number of hackney carriage vehicles on issue has dropped back from the level of 367 to 346, despite the limit on their numbers.



The close comparison between hackney carriage vehicles and driver numbers that had begun to occur in 2016 has clearly continued. The decrease in driver numbers does, however, appear to have slowed a little, but the trend is still a reduction.

Information is also available from these sources to show how the level of wheel chair accessible vehicles (WAV) has varied. It must be noted that in most cases the values for the private hire side tend to be much more approximate than those on the hackney carriage side, as there is no option to mandate for private hire being wheel chair accessible. In some areas, to strengthen the ability of the public to differentiate between the two parts of the licensed vehicle trade, licensing authorities might not allow any WAV in the private hire fleet at all. For Plymouth, all hackney carriages presently must be WAV style, and this has been the case for some significant period of time although we understand there are a high level of driver exemptions for medical reasons of those unable to handle those travelling in wheel chairs.



Operator numbers and levels of WAV provision in the fleet

This shows a rise in operators not long after the previous study although a flattening off of their growth in the most recent three years. This may have related to transport contracts being let by Plymouth City Council education and social services to a wider range of operators, but requiring that they have a legal entity which meant that many individual drivers registered themselves as operators to be able to gain direct access to this source of income.

There are a very small number of WAV in the private hire fleet, although the level of hackney carriage WAV in numerical terms is significant. These figures do not, however, reflect at all the issue of if WAV vehicles actually have drivers that have medical exemptions or not, an issue that has grown in importance in Plymouth since the last survey.

Further, none of these figures take into account the impact of vehicle ownership and the level of drivers who need to rent. It is understood there has been a significant fall in sharing or renting such that there are anecdotal evidences of hackney carriage vehicles being on issue but not actually in use.

In terms of structure of the industry, the main hackney carriage operation sees 60 drivers, whilst the largest private hire operation has nearly 300 drivers. The other large private hire operators have 185, 170, 29 and five, with all other private hire operations being much smaller with many having niche markets such as airport transfers only. Unlike other areas in England there are not very many out of town vehicles operating in the City, with the principal competition coming from the very active private hire element of the trade.

There is a further issue that drivers have a right to medical exemption if they have conditions that prevent them from undertaking manual lifting relating to wheel chairs. A high level of exemptions are in place in Plymouth across the fully wheel chair hackney carriage fleet implying that several such vehicles might not actually be wheel chair capable when specific drivers were using them. At the time of writing this report we understand that 20% of the drivers have such an exemption, although this does not of course restrain them from allowing their vehicle to be used by others without this restriction.

Plymouth undertakes regular review of its policy to limit hackney carriage vehicle numbers in line with the BPG. The previous surveys were in 2015 and 2011 (reporting in 2012). The Hackney Carriage and Private Hire Licensing Policy was reviewed in 2018 in full.

3 Patent demand measurement (rank surveys)

As already recorded in Chapter 2, control of provision of on-street ranks in Plymouth is under the direct control of the City, albeit not the control of the licensing section of the Council. Appendix 2 provides a list of ranks in Plymouth at the time of this current survey. There have not been any significant changes to ranks since the last survey, although some revisions are due shortly after completion of this study, mainly related to proposed city centre developments. The only changes to ranks have been the removal of a very small number of locations where the land use they served has disappeared or been revised away from one that generated hackney carriage trips. The main example of this was the rank formerly associated with the main bus station, which is now closed and being redeveloped.

In terms of changes to the City, there has been a demise of many central area retail outlets since the last study, a change in the overall evening and night time economy activity, a focus of student accommodation around the city centre rather than in the suburbs, and introduction of several app-based methods of obtaining licensed vehicles, most of which are changes also occurring at the national level and not just in Plymouth, although some have been exacerbated by local conditions in the City.

Rank usage across the City continues to be reviewed and there are regular considerations of if specific locations, mainly suburban, need to either be revised or removed to ensure best usage of road space across the City. Most of these proposed changes are fairly obviously related to changes in the nearby locations and were not considered to merit any further rank observation data being collected as part of the survey.

Our methodology involves a current review both in advance of submitting our proposal to undertake this taxi unmet demand survey and at the study inception meeting, together with site visits where considered necessary. This provides a valid and appropriate sample of rank coverage which is important to feed the numeric evaluation of the level of unmet demand, and its significance (see discussion in Chapter 7). The detailed specification of the hours included in the sample is provided in Appendix 3.

Detailed results from the rank observations are contained in Appendix 4, providing hourly summaries of vehicle and passenger arrivals and departures, plus levels of vehicle and passenger waiting as appropriate. It should be noted that the weekend of the surveys saw periods of heavy rain that are likely to have increased passenger usage of hackney carriage vehicles in this period.

Overall average levels of demand

The observations from the rank surveys were analysed and overall estimated weekly levels of demand estimated for each rank. Where factors were used, they were based as far as possible on those used in the previous study unless there was good reason for these to be modified. To provide a historic link and validate the current observations, information from previous surveys has also been drawn into this Chapter and compared to the current observations. The table below compares estimated weekly passenger numbers by rank for the current survey (in descending order of current rank usage), and for each survey for which comparable data is available.

Rank	Pass/wk 2018	Pass/wk 2015	Pass/wk 2012	Pass/wk 1999
Old Town St	5678 (22%)	5052 (18.1%)	3166 (14%)	762 (6.8%)
Whimble St (Old Town St feeder)	(in above)	20 (0.1%)	0 (0%)	
Raleigh St	4121 (16%)	4488 (16%)	3505 (15.5%)	4361 (39.2%)
Station (private)	2665 (10%)	4362 (15.5%)	5452 (24.4%)	1964 (17.4%)
The Parade	1861 (7%)	3390 (12.1%)	2067 (9.2%)	
Derriford Hospital (private)	1619 (6%)	14 (0.1%)	75 (0.3%)	355 (3.2%)
Barbican LP, Oceana (private)	1614 (6%)	415 (1.5%)		
North Hill	1375 (5%)	3275 (11.7%)	253 (1.1%)	
Walkabout (Union St South)	1409 (5%)	940 (3.3%)	858 (3.8%)	
Iceland	1113 (4%)	457 (1.6%)	1454 (6.4%)	488 (4.3%)
Wolseley Rd, St Budeaux	1019 (4%)	532 (1.9%)	853 (3.8%)	168 (1.5%)
Vauxhall St (informal)	868 (3%)	1400 (5%)		
Kularoos (Union St North)	608 (2%)	1780 (6.3%)	1012 (4.5%)	
Mutley Plain (mid)	347 (1.3%)	254 (0.9%)	1162 (5.2%)	
Derry's Cross DAR	323 (1.3%)	93 (0.3%)	212 (0.9%)	
Mutley Plain, Sainsbury's	312 (1.2%)	558 (2%)	682 (3%)	
Barbican Approach Road	261 (1%)		100 (0.4%)	
Derry's Cross (Raleigh St feeder)	120 (0.5%)	44 (0.2%)	180 (0.8%)	
Plympton PO (Ridgeway 99/12)	90 (0.3%)	84 (0.3%)	79 (0.4%)	288 (2.6%)
Torpoint Ferry	89 (0.3%)	261 (0.9%)	312 (1.4%)	304 (2.7%)
Martin St	(incl above)	6 (0.0%)		
Mayflower Centre	40 (0.2%)	10 (0.0%)		
Octagon	27 (0.1%)	60 (0.2%)	20 (0.1%)	
Theatre Royal	18 (0.1%)	Unused	304 (1.3%)	
HMS Drake exit (Saltash Rd)	18 (0.1%)	153 (0.5%)	474 (2.1%)	370 (3.3%)
Plymstock Broadway CP	15 (0.1%)	25 (0.1%)	Unused	
Brass Monkey	14 (0.1%)	Unused		
Mutley Plain (top)	6 (0.02%)	24 (0.1%)		

Plympton Joshua Reynolds	0	12 (0.0%)		
Derry's Cross ABC	Unused	Unused	Unused	Unused
St Levan Rd	Unused	Unused	Unused	Unused
Mayflower St Zanzibar (now K2)	Unused	Unused	30 (0.1%)	
Albert Rd			160 (0.7%)	
Casino				123 (1.1%)
Two Trees (informal)	Gone	365 (1.3%)		252 (2%)
Union St West of Octagon (inf)	Gone			345 (3%)
Bretonside	Gone	Going	117 (0.5%)	
Dingles	Gone	Gone	Gone	1005 (8.9%)
Eastlake St	Gone	Gone	Gone	478 (4%)
Union St Dance Academy	Gone		24 (0.1%)	
Total	25,629	28,072	22,551	11,263
Growth from previous	-6%	+25%	+100%	n/a
Growth from 1999	+127%	+149%	(above)	n/a

The table above suggests a 6% decrease in total demand for hackney carriages at ranks in the City since the last survey. However, the table shows there are places where numbers of passengers have increased, but there appear to be three significant areas of decrease. The first relates to reductions in the two locations near to the Barbican, with both The Parade and the informal Vauxhall Street locations seeing reductions in hackney carriage rank based patronage of around 40%. Secondly, the station has seen a reduction of some a similar level. Finally, the largest reduction has been of around 60% at the North Hill rank. This may relate to the movement of many student accommodation sites to the centre of the City from this area. This is despite the surveys being undertaken on a very similar weekend to those three years ago.

There appears to have been a change in usage of the two main central ranks, with Raleigh Street losing about 9% but retaining its status as the second busiest rank, with 16% share remaining the same. In the recent years, this lower end of the City has seen a decline in retail trade, with more activity at the upper end related to the more recently redeveloped shopping centre there. However, at the time of the survey new hotel and student accommodation was being developed in the Derry's building that might see a return of patronage to this location.

Old Town Street saw a 12% increase in passengers, with its share rising to 22% of the total demand with it being currently the busiest rank in the City.

The most dramatic increase has been at Derriford Hospital which results from move of the rank to a much more obvious location. This site has increased its share from negligible use to taking 6% of average weekly demand, and taking it to the fifth busiest rank in the City at the time of the survey. This demonstrates that with care usage of hackney carriages can be increased to the benefit of people travelling in the area. This has almost certainly been a large benefit to the potentially highly vulnerable clients at this location, and should be lauded as excellent best practice.

With the reductions around the Barbican there are now only three City ranks with 10% or more of weekly demand. In the last survey there were five ranks, with the least having 11.7% whilst now the station, the third busiest rank, has just 10% of average weekly demand. This change means that the trade is now even more dependent on the two central ranks at either end of the shopping area, Old Town Street and Raleigh Street. This is a very important fact.

The Iceland rank has also increased usage, as have several other of the lesser used ranks. This may be related to the new coach station being located near to this rank and possibly to the increased usage of lower cost food outlets in recent years.

There remain about 26 active ranks although the composition of these has changed, these are also still both in the city centre and in various parts of the city suburbs, confirming that hackney carriages in Plymouth are available not just in the central area as often can be the case.

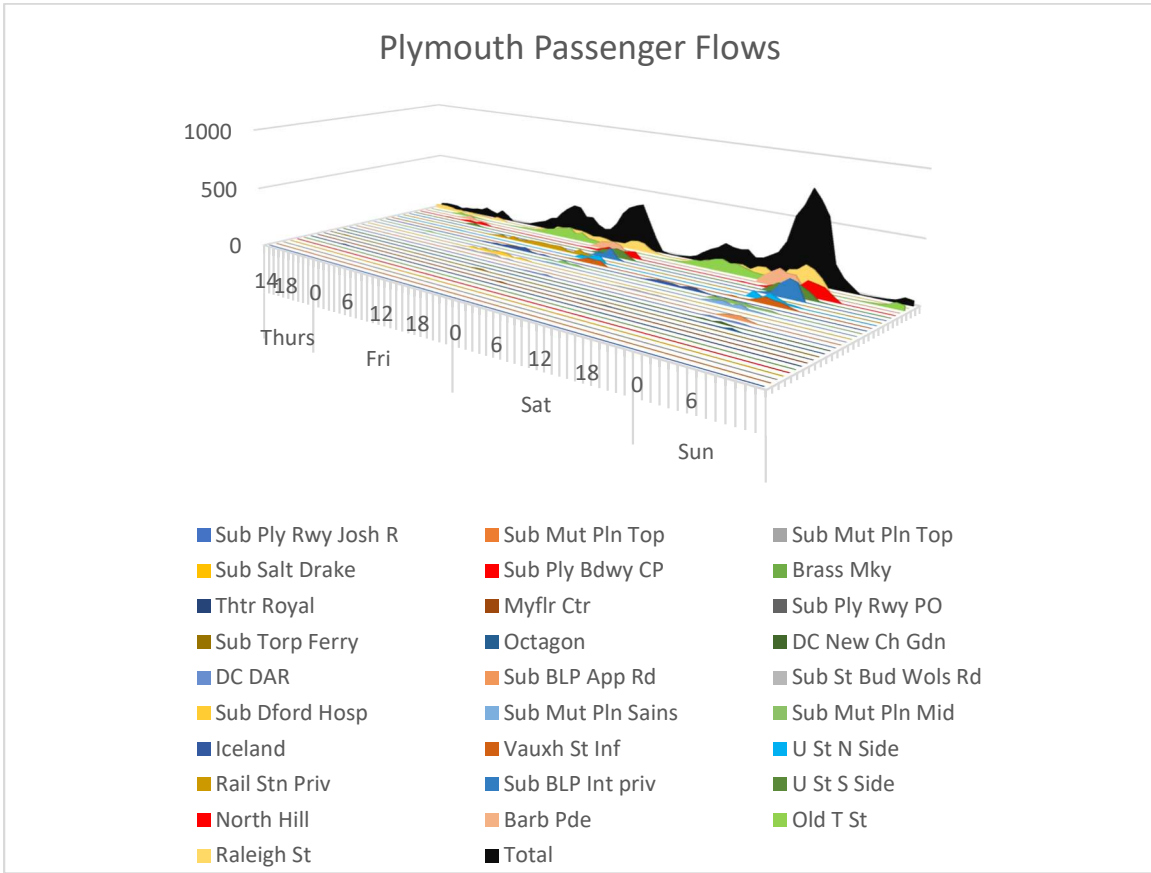
Changes to rank provision

Since the last survey there has been relatively little change to rank provision in the City as noted above, apart from some related to redevelopment work. A further change in this regard has been that the Two Trees public house has been demolished so there is no demand for any informal rank there, and just further along Union Street the informal demand there has also gone away.

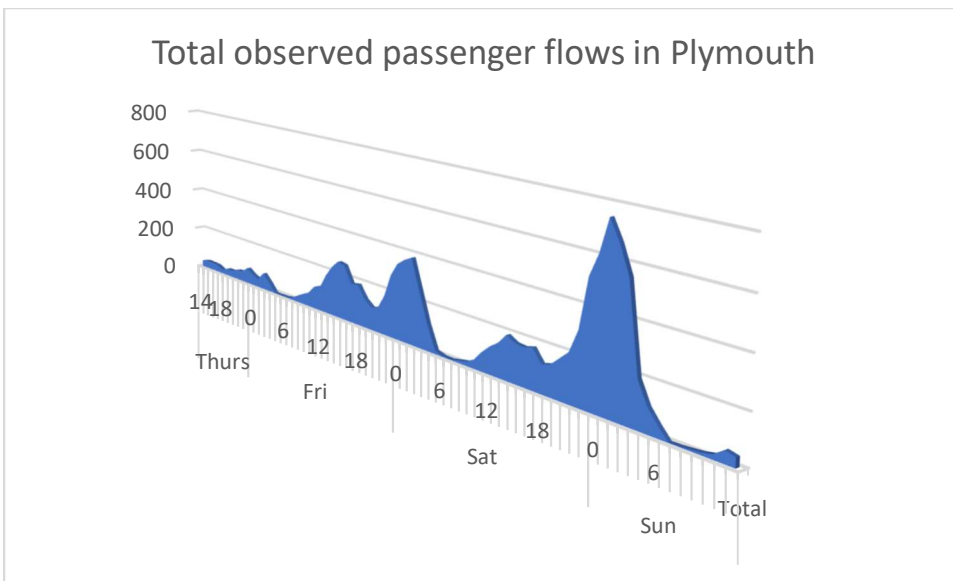
The Derriford Hospital private rank has been moved since the last survey, and is now in a better location directly outside the exit from the hospital. As noted above, this has resulted in an increase in usage.

Contribution of ranks over time

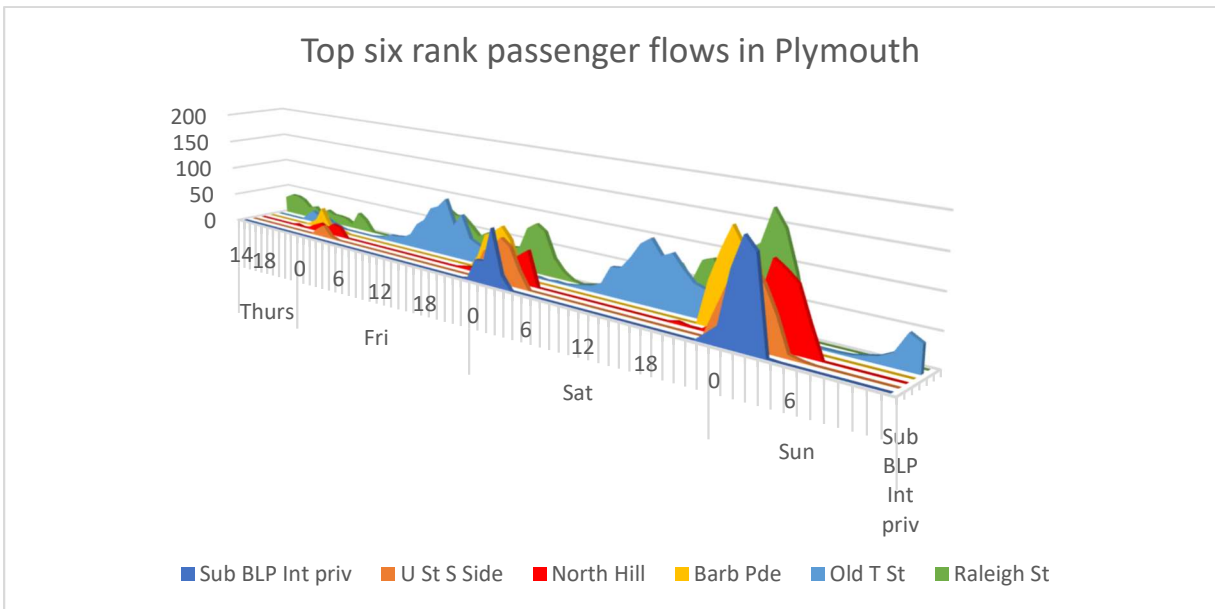
The individual rank demand by hour was plotted for the survey period to demonstrate how the separate ranks contribute to the overall total demand by hour. The graph has to be observed in the context that not all ranks were observed on all days, but the general picture remains valid.



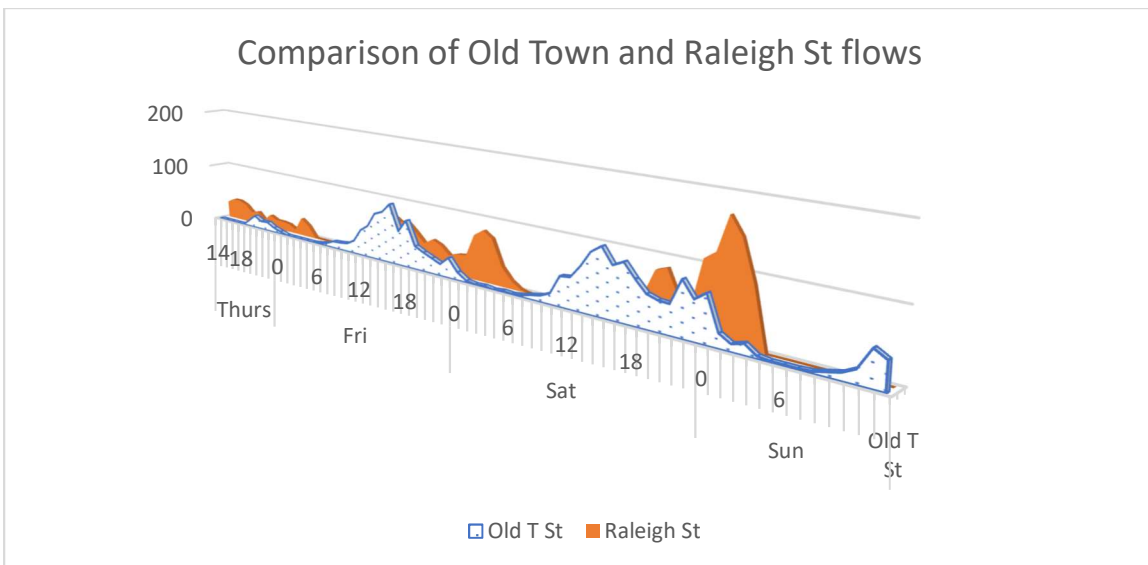
In order to better understand the overall picture, the graph has been split to demonstrate specific points. The graph below plots total demand from the observed ranks (which needs to bear in mind that some ranks were only observed on some days). The most notable feature of the graph is the large peak for Saturday evening.



The graph below shows the top six rank passenger flows identified during our observations.



This demonstrates that it is also notable that this peak is made up from at least these six different locations which increases the level of vehicles needed to meet the level of demand observed. There is a similar peak on the Friday, but at a much lower level, suggesting the area has peaky demand.



The next graph (above) shows a significant difference between how Old Town Street and Raleigh Street ranks operate. The former is very clearly the most important daytime rank, whereas Raleigh Street tends to be an all-day location, which begins later but continues into the early hours on all days.

Although demand does reduce to very low levels in the early hours of each morning, there is still demand somewhere in the City for hackney carriages. Even though North Hill has reduced in overall usage, it tends to be the rank that remains busiest later into the early hours. This accords with the City Council knowledge about daytime and evening and night time economy (ENTE) current usage levels.

The initial graph also clearly demonstrates the large number of active ranks in and around the City, most of which contribute non-negligible flows to the mix.

Incidence of passenger delay

From all the information gathered, totalling some 490 hours of observation across the City, there were average passenger delays over a minute in 7% of these hours. A further 14% of hours had average passenger delays, but less than a minute. This implies that in 79% of all observed hours passengers did not find queues at all.

Further, the hours when there were average passenger delays over a minute saw just over 1,000 people travelling. Of these, 46% actually experienced a delay. For the lesser category of average passenger delay, just 10% of those travelling actually had to wait. There were just 28 people, 0.2% of all those observed travelling from ranks, whose observed wait was 11 minutes or more.

The longest wait observed in all the observations was 23 minutes, then 21 minutes and 18 minutes, with most of those in this category being less than that level. The top two longest waits were actually at private ranks, with the worst at the Barbican Leisure Park internal rank, and the next at the rail station rank.

This confirms, that, though there are average passenger delays and queues at ranks in Plymouth, they are not experienced by the majority of passengers, and they are generally not long waits when they do occur. Some may result from further restrictions on access arising from some locations being private ranks. Further, the earlier note that this was a time of adverse weather that might have increased hackney carriage usage further supports the good level of service enjoyed by customers during our observations.

Review of activity level for hackney carriage vehicles

As in the previous survey, a review was undertaken for nine sample hours of the number of different hackney carriages active to meet the demand observed. The vehicles were observed at locations near to, but not directly at ranks, to minimise chance of being observed and also to obtain a general view of active hackney carriage plates in the streets, not just those servicing specific ranks.

During the course of the sample observations, some 120 hackney carriage movements were recorded. For the full set of observations, just 24% of the hackney carriage fleet was observed. The largest proportion of different plates identified as active in any location was just 9% of the fleet. This was between 21:30 and 22:30, after which the proportion of fleet observed reduced to just 3%. Most values through the day ranged between 2% and 5% of the fleet active. Although these values are low, it must also be recorded that the widespread service by hackney carriages means it is very hard to capture specific points where most would be seen. However, it is clear that the level of demand does not require high volumes of vehicles active. Most tend to be active when there is higher demand, as might be expected.

The analysis also demonstrates that vehicles tend to have longer return to rank times than can be the case in other areas. Our observations never saw one vehicle more than twice within the hour sample period, and in most cases the vehicle was just observed once.

The proportion of fleet active in this survey was significantly less than that in the previous survey (59% then compared to 24% now). There are several potential reasons for this. The number of vehicles no longer active may have some impact, as well as the potential that the adverse weather implied longer journeys were being made, or it took longer for vehicles to be able to return to the rank given the poor driving conditions.

Disability usage of ranks

Across our survey period, a very high total of some 34 persons were observed entering hackney carriages in wheel chairs at ranks across the area. 56% of these were at the Derriford Hospital rank. Old Town Street saw 26%, Raleigh St 12% and two other (suburban) locations 3% each. A further 91 people appeared to have disabilities entering vehicles and received assistance from drivers. This is a very high overall level of assistance to those with disabilities.

Other vehicles seen at or near to ranks

Analysis of vehicles at or near ranks found 79% of vehicles affecting rank operation were in fact hackney carriages. A further 13% were private cars with 6% private hire vehicles. This means there is some abuse of ranks by private vehicles that might hinder hackney carriage access.

Further analysis was undertaken to identify the locations where this was worst. The Mayflower Centre rank saw a small number of hackney carriages but was much more used by private cars. The three other worst locations were suburban sites where there was relatively little hackney carriage usage of the site. The Mutley Plain Top rank saw 78% of movements being private cars, the Drake rank saw 80% and Plympton Broadway saw 68% of movements as private cars. There were also some issues at the developing Derriford Hospital rank where 49% of movements related to the rank were actually private cars.

Whilst it is good that there are few abuses of central ranks, partly arising from better design of these, there is need to resolve the suburban issues to ensure those ranks remain available for the small number of hackney carriages that need them to be available.

There does not appear to be more than a passing issue with abuse of ranks by private hire.





4 General public views

It is very important that the views of people within the area are obtained about the service provided by hackney carriage and private hire. A key element which these surveys seek to discover is specifically if people have given up waiting for hackney carriages at ranks (the most readily available measure of latent demand). However, the opportunity is also taken with these surveys to identify the overall usage and views of hackney carriage and private hire vehicles within the study area, and to give chance for people to identify current issues and factors which may encourage them to use licensed vehicles more.

Such surveys can also be key in identifying variation of demand for licensed vehicles across an area, particularly if there are significant areas of potential demand without ranks, albeit in the context that many areas do not have places apart from their central area with sufficient demand to justify hackney carriages waiting at ranks.

These surveys tend to be undertaken during the daytime period when more people are available, and when survey staff safety can be guaranteed. Further, interviews with groups of people or with those affected by alcohol consumption may not necessarily provide accurate responses, despite the potential value in speaking with people more likely to use hackney carriages at times of higher demand and then more likely unmet demand. Where possible, extension of interviews to the early evening may capture some of this group, as well as some studies where careful choice of night samples can be undertaken.

More recently, general public views have been enlisted from the use of council citizens' panels although the issue with these is that return numbers cannot be guaranteed. The other issue is that the structure of the sample responding cannot be guaranteed either, and it is also true that those on the panel have chosen to be there such that they may tend to be people willing to have stronger opinions than the general public randomly approached.

Finally, some recent surveys have placed an electronic copy of the questionnaire on their web site to allow interested persons to respond, although again there needs to be an element of care with such results as people choosing to take part may have a vested interest.

Our basic methodology requires a sample size of at least 200 to ensure stable responses. Trained and experienced interviewers are also important as this ensures respondents are guided through the questions carefully and consistently. A minimum sample of 50 interviews is generally possible by a trained interviewer in a day meaning that sample sizes are best incremented by 50, usually if there is targeting of a specific area or group (e.g. of students, or a sub-centre), although conclusions from these separate samples can only be indicative taken alone.

For some authorities with multiple centres this can imply value in using a higher sample size, such as 250 if there are two large and one moderate sized centre.

For Plymouth, a similar sample size was sought based on travelling around eight of the suburban areas plus a larger volume in and around the main city centre. However, the sample was reduced for this survey by poor weather, although the sample size remains that we would consider to be appropriate and reliable in results. Interviews were obtained in shopping areas at Plymstock Broadway, Plympton Ridgeway, St Budeaux, Ernsettle, Whiteleigh, Southway, Crownhill and Devonport, although no further analysis at the detailed level was undertaken for this survey. A total of 254 persons were interviewed across the full City Council area.

It is normal practice to compare the resulting gender and age structure to the latest available local and national census proportions to identify if the sample has become biased in any way. For this survey, our gender sample saw slightly less men interviewed (48% compared to 50% in the census estimates). The level of people under 30 interviewed was very similar to the census, although more central age and less older group people were interviewed (44% central compared to 37% census and 29% older compared to 35% census). These variations are not significant and should not revise the results to any major degree.

58% said they had regular access to a car whilst 85% said they lived in the Plymouth City council area. Most of those not from the area were from nearby Devon and Cornwall locations, although there was one who said they were from overseas, and another from further away in the United Kingdom.

All respondents told us if they had used licensed vehicles in the last three months in Plymouth. 43% said they had. This is reduced from the level of 60% in 2012 and 64% in 2015.

Most then went on to advise us their frequency of use of licensed vehicles. 36% said they never used them, with 26% saying once or twice yearly. Based on assumptions on trips per category (calibrated to the most recent National Travel Survey) the resulting estimate of licensed vehicle trips per person per month was 1.5, fairly low, and also reduced from the level of 2.4 in the 2015 responses. When the similar questions was asked but focussed on hackney carriages, the resulting value was 0.9, also fairly low, but an encouraging proportion (60%) of the total, and the same as in the last survey.

64% of those interviewed told us how they normally got a licensed vehicle in the Plymouth City area. Five gave three responses and fifty gave two responses. Of all the responses, 43% were use of a taxi rank and 1% hailing on street. This is of a similar order of magnitude to the 60% estimate from the trip rates of usage of hackney carriages, particularly when it is remembered that there are several phoned-for companies who operate at least some hackney carriages. The current level quoted for use of ranks is increased from the 24% of 2015, although hailing is reduced from 3% then to 1% now.

40% said direct phone, 6% free phone and 10% an app. Two apps were named, with a more recent company obtaining 75% of the quoted use of apps. Apps are a growing area with many younger people preferring to use the certainty and speed of an app – with app-based bookings often getting priority within company systems.

In the section below, we do not generally name companies to avoid issues with confidentiality and potential claims of showing favouritism or promotion of specific companies. However, those with detailed knowledge of the area may be able to identify specific companies although this should not be assumed as being correct. Our detailed responses in the Appendices provided exact details if required for validation purposes (only).

37% of those responding told us up to three companies they used when phoning for a licensed vehicle. Six people gave three names whilst 42 gave two and the remaining 47 just a single name. Of all these mentions, the top company obtained 42% of mentions, followed by 32%. The top company is a long-standing private hire company, with the second also a large private hire only company. However, in 2015 the top phoned for company obtained 54% of mentions with the next just 13%, suggesting stronger competition between these companies now. These figures also reflect companies having purchased smaller competitors since 2015 which has evened the playing field a little between the larger companies but overall implies stronger levels of competition and reduced choice for the consumer in absolute terms.

The next highest level of mentions was a hackney carriage only company and a mixed fleet company, both taking 7% of mentions. The hackney carriage phone network gained just 3% of mentions in 2015, suggesting they have tried to compete with the changing situation. The mixed fleet company also has an app and was the most-quoted of the two apps named. Four other companies were named specifically, gaining 5, 4, 3 and 1% of the mentions obtained.

This level of response suggests there is some dominance of the phone market by private hire companies, with a moderate level of competition, although most people seem to be satisfied with the company they regularly use with very little quoting of more than two companies, and the bulk of respondents just naming the company they principally used.

Further questions focussed on specific usage of hackney carriages in the City area.

Just 3% of those responding told us they could not remember seeing a hackney carriage in the Plymouth City Council area. A much higher 53%, however, said they could not remember when they last used a hackney carriage. Both of these are increases to levels in 2015, suggesting reduced use of hackney carriages in contrast to the previous responses suggesting increased usage.

Similar to the response for overall use of licensed vehicles, the most frequent quoting was use once or twice yearly (15%). The next highest level of usage, however, was 9% for once or twice weekly, followed by 7% saying once or twice monthly.

Just under half of all respondents told us the ranks they were aware of in the City, and if they used them or not. Again, 48%, or nearly half, gave three rank names and a further 42% gave two names. Further, a very high 61% of the responses had confirmation that those naming the location actually used that location. This suggests good knowledge and usage of ranks in the area.

25 different locations were named, although some were colloquial names such as Prizm Nightclub. Some suburban ranks were also named, including Albert Road Devonport and Crownhill library, with some saying they did use these locations.

The most quoted location was the station, with 30% of all mentions. 70% of respondents quoting this location said they used it. The next most quoted location was Old Town Street, with 11% of responses, and 64% saying they actually used it. This was a significant increase from the 3% saying this in 2015. Royal Parade gained 9%, Derry's Cross 8%, Charles Street 7%, Union St 6% and Mayflower St also 6%. Exeter Street and Guildhall gained 4%, Drakes Circus and Prizm 3%. Both Coach Station and Theatre obtained 2% of all mentions, although the Theatre rank was notable in that all those quoting it said they did not use it.

All other quoted locations obtained 1% or less of mentions, with six of the twelve quoted having those mention them say they knew of them but did not use them. These included Charles Cross roundabout, Armada Way, Bus station, North Parade and Raleigh Street.

Overall, this is a very good knowledge of ranks, and very good quoted usage of those people are aware of. Old Town Street has clearly increased its value in the minds of those interviewed. It is therefore a rank important to people who use hackney carriages, as well as to observed usage and the trade.

37% of respondents told us their rating of various aspects of their most recent trip by licensed vehicle.

Overall, only one category scored any very poor or poor, with the bulk of responses tending to be 'good'. The most significant high score for 'very good' related to driver knowledge of the area, which scored 28%. Driver professionalism was second with 18% saying they felt this was very good. However, driver appearance and hygiene scored the two highest 'average' levels at 30% and 27% respectively. Vehicle cleanliness and repair also obtained relatively high 'average' scores of 27% each.

The only item that had scores in each category, with 6% very poor, 8% poor and just 8% very good was for fares. This was backed up by one person stating that 'fares are becoming too expensive'. There was further support for this being an issue when people were asked what would encourage them to use hackney carriages or use them more often. Just over half said cheaper fares, although this is a typical national reaction. For Plymouth, this response dominated all other responses even though we do not include it in the standard responses to ensure it is a clear reaction and not just a response to the options offered. This should be borne in mind in future consideration regarding fares as it implies there is a higher elasticity to fares than often is the case.

81% felt there were enough hackney carriages from 19:00 to 07:00 in the Plymouth city area. This suggests people feel they can get hackney carriages when and where they need them and plays down any potential significance of any observed unmet demand from a user perspective.

Respondents were asked if they, or anyone they knew, needed an adapted licensed vehicle, and if so what kind of vehicle was needed. 88% said they were unaware of anyone needing such a vehicle. For those responding they needed, or knew someone who needed an adapted vehicle, the bulk said they knew someone who would need a WAV. Of the total respondents for this question, 10% said a WAV and just 1% some other form of adapted vehicle, with one person saying they needed a higher style vehicle to make their access easier. These responses were similar to 2015.

Two questions were then asked to identify the observable level of latent demand in the area. 5% said they had given up waiting at a rank, all at the Pryzm rank, whilst 1% said they had given up trying to hail a hackney carriage, again near Pryzm. Taking the number of people involved, this suggests a rank based latent demand factor of 2.3% and a hailing based one of 0.4%, and a total latent demand factor of 2.7%, relatively low, and reduced from the level of 1.037 in 2015, which only measured rank latent demand.

Everyone that responded said they felt safe using a hackney carriage during the day time. This value reduced to 88% for the period after 18:00. 6% of those interviewed gave us suggestions as to what might make them feel safer using hackney carriages. 26% said more female drivers would help. 20% said taxi tracking and a further 20% use of marshalls. Other comments were made, but only by one person.

63% said they would prefer to see the hackney carriage fleet have a livery; 65% of respondents said they felt a livery would help to improve public safety using hackney carriages.

34% of those responding to the question about use of an electric powered hackney carriage said they would use one as long as it did not cost any more. Just 2% would be happy to pay more to use one. 63% said they had no preference towards electric vehicles.

65% of those responding in regard to use of credit or debit cards to pay fares would be happy to use the facility, but only as long as there was no surcharge for doing so. 3% would use for every journey, but 28% said they would still pay in cash. One person was concerned about the security of this payment method, whilst another felt cash made it easier to split the fare between friends.



5 Key stakeholder consultation

The following key stakeholders were contacted in line with the recommendations of the BPG:

- Supermarkets
- Hotels
- Pubwatch / individual pubs / night clubs
- Other entertainment venues
- Restaurants
- Hospitals
- Police
- Disability representatives
- Rail operators
- Other council contacts within all relevant local councils

Comments received have been aggregated below to provide an overall appreciation of the situation at the time of this survey. In some cases, there are very specific comments from given stakeholders, but we try to maintain their confidentiality as far as is possible. The comments provided in the remainder of this Chapter are the views of those consulted, and not that of the authors of this report.

Our information was obtained by telephone, email, letter or face to face meeting as appropriate. The list contacted includes those suggested by the Council, those drawn from previous similar surveys, and from general internet trawls for information. Our target stakeholders are as far as possible drawn from across the entire licensing area to ensure the review covers the full area and not just specific parts or areas.

For the sake of clarity, we cover key stakeholders from the public side separately to those from the licensed vehicle trade element, whose views are summarized separately in the following Chapter.

Where the statistical analyses in Chapter 2 demonstrate low levels of wheelchair accessible vehicle (WAV) provision, an increased emphasis will be given to the issue in terms of the focus of stakeholders but also in specific efforts to contact disabled users and their representatives. However, it must be remembered that none of our consultation is statutory and for cost effective and fixed budget reasons we limit our attempts to contact people generally to a first attempt and reminder.

Supermarkets

Six supermarkets told us their customers made use of licensed vehicles. Three others made no comment. One said people used the rank outside, two said they had a freephone many customers used, or made their own arrangements, two said people always made their own arrangements, and one said people often asked at customer services, or made their own arrangements. One other was aware of a nearby rank, whilst none said customers had ever in their memory complained about the licensed vehicle service. The only issue was that one supermarket found drivers would not make way when there were deliveries, which could be awkward to the store.

Hotels

Three hotels said their customers used local licensed vehicles. Two said staff would phone for a vehicle, or customers might make their own arrangements whilst the other said people usually made their own arrangements or alternatively staff would do so. One was aware of a nearby rank, another a booking office and the third was aware of neither. None had ever received complaints they could remember. Two others made no comment.

Public houses

Five pubs said their customers made use of local licensed vehicles. Two said people made their own arrangements to get vehicles, one said either people made their own arrangements or staff would make contact, another said staff usually made arrangements for people, and the final said either people made their own arrangements or staff advised them about the nearby rank. Three were aware of nearby ranks, one was aware of a booking office and the other was not aware of either.

Three said customers had not complained about any issue with taxis whilst one said vehicles were occasionally delayed in arriving, and another said there were never enough taxis. This location was also aware that an informal rank near them was causing issues to local residents.

Night clubs

Four night clubs made no comment about licensed vehicles in the time available.

Other entertainment venues

One entertainment venue said their customers did use local licensed vehicles, mainly by using a freephone they had in their foyer. They were also aware of a rank outside and others nearby. They had received complaints from customers but did not wish to explain any further. One other location had closed down, one refused to provide any input and the other proved impossible to contact. Five other locations proved impossible to get through to by any means.

Restaurants

Four restaurants said their customers made use of local licensed vehicles. Two said staff would book vehicles, whilst others said whilst staff were willing to make bookings, many customers made their own arrangements. One was aware of a nearby rank with two others aware of booking offices. One was aware of neither. None had received any customer complaints. The only comment made was that one used a company who always arrived and then phoned the restaurant to ask them to send the customer to the vehicle. One location sought was found to be closed down, whilst two others made no comments.

Police

A police representative told us they did not think there was any problem with the number of hackney carriages available in Plymouth. They said many drivers constantly served a single location. They were aware there were always enough hackney carriages in the suburban shopping areas with ranks, but that there was never over-ranking there. They were concerned about the cost of use of the station rank which they felt was starting to become too expensive for those drivers currently choosing to serve to continue to do so. They felt the variation of closing times helped spread out late night demand very well.

Disability

Age UK Plymouth told us they found it hard to get wheel chair accessible vehicles at around 16:00 when most were on school runs. Further, many drivers did not come into their centre to collect passengers, but waited outside and then left without announcing their presence.

Other groups

A representative from Plymouth University said they felt hackney carriages were more expensive than private hire so tended not to use them. However, they also felt whilst there were more than enough taxis outside peak times, at peak there were not enough. They were concerned about where the daytime vehicles would be able to wait given rising levels of traffic congestion.

Of the wide range of both city council and other contacts sought, no others provided any response. Further details of those invited to respond are contained in Appendix 6.

Rail Industry statistics

The rail industry produces a set of annual information about the total number of passengers entering and exiting stations across mainland England, Scotland and Wales. These statistics are produced showing annual estimates ending in March of the year quoted. There tends to be a reasonable lag in provision of these numbers with new values usually issued in December of the year in question.

For the City of Plymouth, there are currently six national rail stations. As might be expected, Plymouth is the busiest, currently ranking 242nd out of a total of 2,563 stations, where the lower number shows the busiest station. The next busiest station in the City is Devonport, with 45,492 entries and exits for the latest year, placing it 2,018th in the rankings (up from the previous year). St Budeaux Victoria Road is 2,347th with 7,968, Keyham 2,364th with 7,188 (significantly down on the previous year), Dockyard 2,412th with 4,432 and St Budeaux Ferry Road lowest at 2,447th with 2,680 total in and out passengers. The values over the period of the data gathering for Plymouth are provided below.

Rail year (ends March in last yr noted)	Entries / exits	Growth / decline
Plymouth (242nd)		
1997 / 1998	1,294,698	n/a
1998 / 1999	1,340,634	+4%
1999 / 2000	1,386,052	+3%
2000 / 2001	1,298,879	-6%
2001 / 2002	1,392,778	+7%
2002 / 2003	1,431,674	+3%
2003 / 2004	Not collected	
2004 / 2005	1,519,011	+6% (2 yrs)
2005 / 2006	1,629,011	+7%
2006 / 2007	1,845,958	+13%
2007 / 2008	2,026,852	+10%
2008 / 2009	2,249,849	+11%
2009 / 2010	2,278,718	+1%
2010 / 2011	2,401,082	+5%
2011 / 2012	2,599,428	+8%
2012 / 2013	2,579,316	-1%
2013 / 2014	2,445,464	-5%
2014 / 2015	2,495,248	+2%
2015 / 2016	2,487,562	-0.3%
2016 / 2017	2,509,452	+0.9%
2017 / 2018	2,449,094	-0.1%
Last three years (14/15 to 17/18)		-2%

This table shows that the latest three years have seen a marginal decrease in flows at Plymouth station of around 2%. This compares to the 39% reduction observed in hackney carriage rank demand at that rank in the similar period.

The 2,449,094 includes 90,299 passengers interchanging at Plymouth. This suggests there are some 1,179,398 passengers leaving the station each year. The current weekly patronage of hackney carriages of 2,665 would mean they take away about 11% of the arriving passengers at the station based on multiplying this value by 50 to get from average weekly to annual levels.



6 Trade stakeholder views

The BPG encourages all studies to include 'all those involved in the trade'. There are a number of different ways felt to be valid in meeting this requirement, partly dependent on what the licensing authority feel is reasonable and possible given the specifics of those involved in the trade in their area.

The most direct and least costly route is to obtain comment from trade representatives. This can be undertaken by email, phone call or face to face meeting by the consultant undertaking the study. In some cases to ensure validity of the work being undertaken it may be best for the consultation to occur after the main work has been undertaken. This avoids anyone being able to claim that the survey work was influenced by any change in behaviour.

Most current studies tend to issue a letter and questionnaire to all hackney carriage and private hire owners, drivers and operators. This is best issued by the council on behalf of the independent consultant. Usual return is now using an on-line form of the questionnaire, with the option of postal return still being provided, albeit in some cases without use of a freepost return. Returns can be encouraged by email or direct contact via representatives.

Some authorities cover private hire by issuing the letter and questionnaire to operators seeking they pass them on when drivers book on or off, or via vehicle data head communications.

In all cases, we believe it is essential we document the method used clearly and measure response levels. However, it is also rare for there to be high levels of response, with 5% typically felt to be good and reasonable.

For this survey, the council issued letters and the survey to all drivers, owners and private hire operators. In total there were 134 responses provided, all but 20 of which were returned in paper format. This was more than the 88 returned in the previous survey. We also consulted with the local hackney carriage trade association, the Plymouth Licensed Taxi Association, PLTA.

Unusually, 56% of responses were made by those who said they drove private hire vehicles with 42% saying they drove hackney carriage. This was a much higher response from private hire than in the last survey when 65% of responses were from hackney carriage drivers. One person responded but told us they did not drive any vehicle, and two people told us they drove both hackney carriage and private hire.

In terms of average length of service, those driving hackney carriages tended to have a longer level of service, some 21 years compared to the 11 years of private hire, but the longest serving person was on the private hire side, with some 52 years quoted.

For the week before the person had answered the questionnaire, 38% of hackney carriage drivers said they had worked all seven days. 25% had worked six days and 22% five days. One had not worked and 13% had worked between two and four days. Their average working week was six days and 51 hours. Private hire drivers had on average worked five days, with 45% saying they worked six days and 32% five days. Just 11% said they had worked seven days. However, their average hours worked were not much less than the hackney carriage at 49 hours.

Most provided issues that affected their choice of shift, with some giving more than one reason. Of all the responses provided, the highest proportion, 30% said they worked at busy times. 18% said they worked around family commitments and 16% said they avoided disruptive passengers, quite a high level, and significantly higher than the 6% quoting this last time. Just 2% said they avoided heavy traffic, significantly reduced from the 19% of the previous survey, whilst 5% said their hours were influenced by them sharing a vehicle. Two people, 1% of the response, said the hours they worked were influenced by their age.

77% said they owned their own vehicle. This was exactly the same as in the last survey. Just 5% said someone else drove their vehicle – much reduced from the 14% of the last survey. 72% said they accepted pre-bookings with 79% of these via an office. However, 9% said their bookings were via an app.

14 different companies were named with a large private hire company obtaining 30% of the quotes. Another private hire operator gained 19%, and a third 17%. A hackney carriage circuit obtained 16% of quotes, with no other company getting more than 3% of the responses given. Some of the smaller names were clearly hackney carriage operations.

28 different ranks were quoted as being used by drivers. The top three had almost equal shares of 13-14% each, being Old Town Street, Derry's Cross (by which we understand they mean Raleigh Street) and the station. This was a similar level for Derry's Cross and an increase from 5% for the station and from 9% for Old Town Street.

Other ranks gained no more than 7% of mentions, with five either 6 or 7%, five between 2 and 4% and the remainder 1% each. Derriford Hospital rank gained 4% of mentions, with many other non-central ranks also quoted. Some more general names were also provided that were not clear which actual rank was mentioned. This suggests a good level of service is provided across the city to a range of ranks.

Of those responding, 91% felt the limit policy remained correct for the area. This was significantly increased from the 84% saying this in the last survey. This included a good number of private hire drivers. There were ten private hire and one hackney carriage who disagreed and felt the limit was not correct. 93% of those responding felt there were enough hackney carriages in the Plymouth area.

Many gave reasons they thought the limit benefits the public, with 22% of responses being that it reduced congestion and pollution, followed by 19% saying this meant supply and demand were kept equal. 14% felt it maintained vehicle standards. This time there was no mention of reduction in over-tired drivers.

16% said they did not believe the limit benefitted the public. Just over half of these were private hire, but there were several hackney carriages that gave this response, with all but one of them still agreeing the limit should be kept.

Of those telling us the reaction they would have were the limit removed or increased, the highest response at 36% was that they would leave the trade. This was almost the same as in the last survey. There were many other reactions, including the usual one that people would increase their hours (about 7% of the response).

For all respondents, the most frequent way of getting fares – for 43% - was by phone, with 34% from ranks, 15% by app and 2% hailing. School contracts accounted for just 2%. While just one driver said they got all their fares from ranks, a good number said they got all their contracts from phone bookings (relating to the high level of private hire response). The only other method for which people said they were totally dependent was phone app. A high proportion claimed to get up to a quarter of their fares from hailing.

Many other comments were made, most of which were that there was too little demand for the present hackney carriage fleet and that it was getting harder to make a living. Other comments about lack of ranks were also made.

One hackney carriage fleet owner provided their views about the current hackney carriage service provided. They informed us they were aware of at least 25 hackney carriages that were owned but which had no-one that wanted to drive them. This arose because the City did not produce enough revenue for drivers and suggested reasons including:

- Very small current levels of service personnel at Dockyard
- An empty Marine Barrack facility
- All student accommodation is now in the centre of town generally near to their teaching locations
- The cruise ship terminal remains unbuilt

They suggested there were probably a lot of drivers who actually had licences but did not use them, keeping them just in case they needed to use them at some point. Their conclusion was a surfeit of hackney carriage vehicles rather than any shortage.

7 Evaluation of unmet demand and its significance

It is first important to define our specific view about what constitutes unmet demand. Our definition is when a person turns up at a hackney carriage rank and finds there is no vehicle there available for immediate hire. This normally leads to a queue of people building up, some of who may walk off (taken to be latent demand), whilst others will wait till a vehicle collects them. Later passengers may well arrive when there are vehicles there, but because of the queue will not obtain a vehicle immediately.

There are other instances where queues of passengers can be observed at hackney carriage ranks. This can occur when the level of demand is such that it takes longer for vehicles to move up to waiting passengers than passengers can board and move away. This often occurs at railway stations but can also occur at other ranks where high levels of passenger arrivals occur. We do not consider this is unmet demand, but geometric delay and although we note this, it is not counted towards unmet demand being significant.

The industry standard index of the significance of unmet demand (ISUD) was initiated at the time of the introduction of section 16 of the 1985 Transport Act as a numeric and consistent way of evaluating unmet demand and its significance. The ISUD methodology was initially developed by a university and then adopted by one of the leading consultant groups undertaking the surveys made necessary to enable authorities to retain their limit on hackney carriage vehicle numbers. The index has been developed and deepened over time to take into account various court challenges. It has now become accepted as the industry standard test of if identified unmet demand is significant.

The index is a statistical guide derived to evaluate if observed unmet demand is in fact significant. However, its basis is that early tests using first principles identified based on a moderate sample suggested that the level of index of 80 was the cut-off above which the index was in fact significant, and that unmet demand therefore was such that action was needed in terms of additional issue of plates to reduce the demand below this level, or a complete change of policy if it was felt appropriate. This level has been accepted as part of the industry standard. However, the index is not a strict determinant and care is needed in providing the input samples as well as interpreting the result provided. However, the index has various components which can also be used to understand what is happening in the rank-based and overall licensed vehicle market.



ISUD draws from several different parts of the study data. Each separate component of the index is designed to capture a part of the operation of the demand for hackney carriages and reflect this numerically. Whilst the principal inputs are from the rank surveys, the measure of latent demand comes from the public on-street surveys, and any final decision about if identified unmet demand is significant, or in fact about the value of continuing the current policy of restricting vehicle numbers, must be taken fully in the context of a careful balance of all the evidence gathered during the survey process.

The present ISUD calculation has two components which both could be zero. In the case that either are zero, the overall index result is zero, which means they clearly demonstrate there is no unmet demand which is significant, even if other values are high.

The first component which can be zero is the proportion of daytime hours where people are observed to have to wait for a hackney carriage to arrive. The level of wait used is ANY average wait at all within any hour. The industry definition of these hours varies, the main index user counts from 10:00 to 18:00 (i.e. eight hours ending at 17:59). The present index is clear that unmet demand cannot be significant if there are no such hours. The only rider on this component is that the sample of hours collected must include a fair element of such hours, and that if the value is non-zero, review of the potential effect of a wider sample needs to be considered.

The other component which could be zero is the test identifying the proportion of passengers which are travelling in any hour when the average passenger wait in that hour is greater than one minute.

If both of these components are non-zero, then the remaining components of the index come into play. These are the peakiness factor, the seasonality factor, average passenger delay, and the latent demand factor.

Average passenger delay is the total amount of time waited by all passengers in the sample, divided by the total number of passengers observed who entered hackney carriages.

The seasonality factor allows for the undertaking of rank survey work in periods which are not typical, although guidance is that such periods should normally be avoided if possible particularly as the impact of seasons may not just be on the level of passenger demand, but may also impact on the level of supply. This is particularly true in regard to if surveys are undertaken when schools are active or not.

Periods when schools are not active can lead to more hackney carriage vehicles being available whilst they are not required for school contract work. Such periods can also reduce hackney carriage demand with people away on holiday from the area. Generally, use of hackney carriages is higher in December in the run-up to Christmas, but much lower in January, February and the parts of July and August when more people are likely to be on holiday. The factor tends to range from 0.8 for December (factoring high demand level impacts down) to 1.2 for January / February (inflating the values from low demand levels upwards).

There can be special cases where summer demand needs to be covered, although high peaks for tourist traffic use of hackney carriages tend not to be so dominant at the current time, apart from in a few key tourist authorities.

The peakiness factor is generally either 1 (level demand generally) or 0.5 (demand has a high peak at one point during the week). This is used to allow for the difficulty of any transport system being able to meet high levels of peaking. It is rarely possible or practicable for example for any public transport system, or any road capacity, to be provided to cover a few hours a week.

The latent demand factor was added following a court case. It comes from asking people in the on-street questionnaires if they have ever given up waiting for a hackney carriage at a rank in any part of the area. This factor generally only affects the level of the index as it only ranges from 1.0 (no-one has given up) to 2.0 (everyone says they have). It is also important to check that people are quoting legitimate hackney carriage rank waits as some, despite careful questioning, quote giving up waiting at home, which must be for a private hire vehicle (even if in hackney carriage guise as there are few private homes with taxi ranks outside).

The ISUD index is the result of multiplying each of the components together and benchmarking this against the cut-off value of 80. Changes in the individual components of the index can also be illustrative. For example, the growth of daytime hour queueing can be an earlier sign of unmet demand developing than might be apparent from the proportion of people experiencing a queue particularly as the former element is based on any wait and not just that averaging over a minute. The change to a peaky demand profile can tend towards reducing the potential for unmet demand to be significant.

Finally, any ISUD value must be interpreted in the light of the sample used to feed it, as well as completely in the context of all other information gathered. Generally, the guide of the index will tend not to be overturned in regard to significant unmet demand being identified, but this cannot be assumed to be the case – the index is a guide and a part of the evidence and needs to be taken fully in context.

Element	2018	2015	2012
Average wait (mins)	0.3	0.12	0.09
Peak factor	0.5	0.5	1
% Queues in weekday daytime hours	25	4.3	0.8
% pass in hours with waiting over 1 minute	10.24	4.74	2.37
Latent demand	1.027	1.037	n/a
Overall index	39.41	1.25	0.17
(nb overall index calculated from detail therefore does not necessarily match multiplying numbers shown)			

Apart from the peak factor, which has remained the same, and the latent demand factor, which has reduced, all the elements of the index of significance of unmet demand have increased since the last survey, with the overall value now the highest in the surveys of recent years. These changes are despite there having been a reduction in demand of some 6%.



8 Summary, synthesis and study conclusions

This Taxi unmet demand survey on behalf of Plymouth has been undertaken following the guidance of the BPG and other recent case history regarding unmet demand and its significance.

Background and context

The principal survey work for this study was undertaken in November and December 2018 including on-street, rank and key stakeholder consultation. Driver views were obtained in March 2019. The study is in the background of a slow overall decline in vehicle numbers in the area, even for hackney carriages despite the limit being in place. This review is the latest in a Best Practice Guide (BPG) compliant set of surveys, the previous one of which was three years earlier, in 2015. Overall, the city has seen significant change in overall background economics with respect to reduced central retail, changes in student accommodation locations and changed evening and night time economy, all similar to national trends but in some case more focussed in Plymouth in their impact.

Rank observations

The rank observations show a small decline in overall usage of hackney carriages at ranks since the last survey, of some 6%. This compares to there having been growth between the previous two surveys of some 25%. This is not as severe a decline as might have been expected from the background information about changes, although the level of usage might have been increased by poor weather conditions during the rank survey work.

Despite there being reductions in flows related to the night time economy, overall the level of peakiness of demand has in fact increased in the area. However, it also seems that the focus of night usage has also tended to become itself more focussed. The changes in the retail mix have been reflected in Raleigh Street reducing patronage whilst Old Town Street has increased making it the busiest City rank at this time – with just over a fifth of all passengers observed here.

The concentration of passenger flow is demonstrated by there now only being three of the range of ranks in the entire City that have 10% or more of weekly demand. Two other ranks, the Iceland one and that at Derriford Hospital, have seen increased usage. The increase at the hospital relates to access changes to the rank location and demonstrate that it is possible with care to see increased usage of hackney carriages from ranks.

Hackney carriages remain available right across the City in ranks both in the central area and in the suburbs. This is excellent service and good usage of vehicles.

79% of all observed hours did not have any average wait time at all for passengers. Further, for the hours when average passenger waits were a minute or more, only 46% of those travelling in those hours actually experienced a wait themselves. Observed waits of 11 or more minutes were restricted to just 0.2% of all passengers. Further, the two largest wait times were at private ranks and not council provided facilities.

In this survey a reduced level of vehicle activity was observed, with just under a quarter of all plates seen in our sample observations. The busiest hour saw just 9% of the fleet observed. Whilst this reflects the fact that some of the fleet are not active at all, it is also a result of the wide spread of the fleet over the full area. It is also symptomatic of the size of the City and the relatively longer return to rank times we observed.

However, overall it demonstrates plenty of spare capacity even within the vehicle fleet, yet alone the option of driver sharing of vehicles which no longer appears to be as high as it has been in the past. Further discussion of this follows in the synthesis section of the report.

A very high level of usage was observed of hackney carriages at ranks by those in wheel chairs, and by others with disabilities. A key site for both was the developing Derriford Hospital rank, which is excellent practice that needs to be applauded and advertised.

With respect to rank abuse, the key impact is on some lesser used suburban ranks with many city centre locations being designed to make it very hard for them to be abused.

On street public views

Our survey of 254 people across the entire Plymouth city authority area was fairly representative, although less men and less older people were interviewed than suggested by current census figures. The sample saw 85% say they lived in the Plymouth city area with 58% saying they had regular access to a car.

Quoted usage of licensed vehicles at 43% was reduced from the 2015 level of 64%. Overall estimated usage was also reduced, down to 1.5 trips per person per month, but the proportion estimated to be using hackney carriages was a high 60%.

43% said their normal method of getting a licensed vehicle was at a rank, with 40% phone, 6% free phone and 10% an app. The final 1% was hailing. This again puts hackney carriages in a good light in terms of how people tend to get licensed vehicles in the area.

For those phoning for vehicles there now seem to be two dominant private hire companies, but a hackney carriage phone link did take the third most – at 7% of all quoted phone numbers. This level is increased from the 3% of 2015 suggesting improved marketing by the hackney carriage networks.

As might be expected with a fully wheel chair accessible and generally 'black cab' style hackney carriage fleet, just 3% could not remember seeing a hackney carriage in the area. However a much higher 53% could not remember when they last used a hackney carriage. Both these values were increased from 2015 which counters the other evidence of increase hackney carriage usage levels.

Good knowledge and use of ranks was identified. The station was most known about whilst Old Town Street came second. High proportions of those mentioning all ranks said they actually used them. Suburban ranks were known about as well as many central area ones, although some well-used ranks did not seem to be known as their formal names (principally Raleigh Street).

The experience of using vehicles was generally good or very good with only fares having any very poor or poor scores. This was backed up by people telling us a key thing that might increase their usage of hackney carriages was lower fares.

People were generally satisfied they could get a hackney carriage when and where they wanted one. Most of those needing disability adapted vehicles said they needed a wheel chair style vehicle.

The rank-based latent demand factor was estimated at 2.3% and the hailing level at 0.4%, giving a total latent demand value of 2.7%, less than the 3.7% estimated in 2015.

Everyone felt safe using hackney carriages in the daytime and this value only fell to 88% for night travel. There was reasonable support for a livery with most saying this would help improve feelings of safety. 34% would use an electric vehicle but there was reticence by these to pay any more to do so. A higher proportion, 65% said they would use a credit card facility, but again only if it did not cost more. 28% said they would still pay cash.

Key stakeholder views

There were a few complaints about licensed vehicles from key stakeholders, but none were significant. There was a very high knowledge by stakeholders about ranks near their venues and an awareness that their customers often used them. However, some ranks were known not to be used by customers even though they were near the premises in question.

The police were pleased with the level of availability of hackney carriages in the area, with their main concern being the cost of vehicles to service the station.

A disability organisation expressed their members often had issues getting vehicles when many were servicing education contracts and had detailed issues with how drivers did not collect passengers that could not wait outside due to their disabilities.

National statistics suggest flows at Plymouth station have reduced since the last survey, but not by as much as the usage of the rank has reduced. Despite this, there are still about 11% of passengers that arrive at the station estimated to be leaving in hackney carriages from the rank.

Trade views

A much higher response was received to our all-driver survey in this survey, although this time 56% of responses were from those saying they drove private hire vehicles.

Average length of service tended to be about twice as long for hackney carriage drivers compared to private hire. Generally, hackney carriage drivers worked more days but only marginally more hours than their private hire counterparts. This is typical.

Most worked when it was busiest, but 16% said they avoided times when passengers might be more disruptive. The same, high proportion, said they owned their own vehicles with little sharing of vehicles.

A very high proportion accepted pre-bookings with 79% via an office, but 9% using an app. Many of the pre-bookings went to hackney carriages.

The top three ranks used mirrored those used by the public, although Raleigh Street, Old Town Street and the station, all obtained similar quoted levels of use by the trade. The trade tended to call Raleigh Street Derry's Cross.

The level of drivers supporting the limit had risen to 91% from the 84% of three years previous. The bulk of those against the limit were from the private hire element. The top benefit for the limit to the public quoted was that it reduces congestion and pollution, with almost an equal amount saying they believed it kept demand and supply balanced.

When asked how fares were obtained, phone and ranks were the top two methods, although quite a few said they got up to a quarter of their fares from hailing.

A large fleet owner told us they felt demand had reduced and that a good number of hackney carriage vehicles were not actually being used because of this drop in demand.

Formal evaluation of significance of unmet demand

The elements of the index of significance of unmet demand have mainly tended to increase this time towards unmet demand becoming significant. However, the peakiness factor has actually stayed the same whilst the latent demand value has fallen. The index has increased to 39.41 this time, which remains a long way from the level of 80 that defines the observed unmet demand (which occurs nearly everywhere) as being significant. These changes are despite a reduction in demand but could also relate to the poor weather conditions during the survey that would tend to reduce the ability of the fleet to react to demand, whilst perhaps increasing demand and the distance likely to be travelled.

The largest increase has been in the proportion of off-peak hours that have any queues by passengers – often a symptom of increased usage of phone bookings and apps by hackney carriages, which tends to leave them sitting at ranks much less. However, this can often actually be a benefit to customers if they choose to use an app or a phone booking to obtain their hackney carriage.

Synthesis

Whilst there has been only marginal change to actual rank provision in the area since the last study, there have been many changes on the demand side that, in the end, resulted in a small overall reduction in the number of trips being made from ranks by hackney carriages in the City. Both the private hire and hackney carriage trade have upped their game but in the end both fleets have reacted by reduced numbers of vehicles being able to operate. The trade have reacted to the changed circumstances in many ways. As already noted above, some have moved out of the trade.

On the company side, many larger companies have bought out smaller ones to reduce competition, but at the same time have increased overall competition through marketing. Introduction of apps has fuelled new customer expectation, and more hackney carriages have moved towards both apps and access to telephone networks to increase their opportunities to obtain work. Both of these have improved customer access to vehicles, but reduced availability at ranks in quieter periods.

People in the area are highly satisfied with the service they obtain, and ranks remain high in the options considered both by people and by key stakeholders in how their customers are serviced. People feel safe using hackney carriages but the main concern relates to cost – with people always seeking to make better use of their money which leaves hackney carriages with fixed fares more susceptible to competition – although they do seem to be coping and reacting to some extent as well.

Where ranks have been made more accessible, such as at Derriford Hospital, or where demand has grown, levels of rank usage have increased. Overall people get a good service at ranks, although there is some evidence that private ranks may get marginally worse service at times. Other demand has gone away with retail spaces emptying and students moving to locations where they need less transport. In some cases, such as at Plymouth station, improved public transport and walking options, together with private hire booking options, have moved demand away from the hackney carriage.

But overall, the hackney carriage trade has done well to almost retain its market share and level of patronage, and its customer base and support remains good.

Further, the trade provides a very high level of service to those with disabilities, both wheel chair and those not needing wheel chair service, demonstrated by a very high level of observed usage. This needs to be applauded.

Conclusions

There is no evidence that unmet demand in the City licensing area is significant at this point in time. There is plenty of evidence that the hackney carriage trade is well able to react positively to opportunities to meet passenger need when access to its services are improved. However, the service in Plymouth has a relatively high sensitivity to price.

On the contrary, however, the changes to the evening and night time economy have made servicing such demand much less lucrative such that there is some evidence that less drivers are now willing to meet what is much less trade. This might, somewhat perversely, need an encouragement for those providing a general excess of vehicles in the daytime, to switch to night time demand, for which the main way is by having higher fares, which people tend to be willing to pay more when there are less alternatives available.

However, as stated many times above, both sides of the trade are demonstrating reduced demand by reduced vehicle fleets. There is currently a gap between the number of plates on offer and those currently active. There is some evidence that even some of the plates that are still 'on the books' may well be laid up. To encourage the trade that remain, one option would be to introduce a 'moratorium' on new licence issue, with any unused plate being extinguished by use of a settling limit. This would ensure current service providers were able to be certain they would not see present demand further diluted by any new vehicles. Mechanisms would need to be in place to allow new demand for plates to be recorded perhaps by a waiting list.

At the same time, it will remain very important to ensure that current well-performing locations, such as Old Town Street are not hindered in any way from providing their current service and accessibility.





9 Recommendations

On the basis of the evidence gathered in this Taxi unmet demand survey for Plymouth, our key conclusion is that there is no evidence of any unmet demand for the services of hackney carriages either patent or latent which is significant at this point in time in the Plymouth licensing area. The committee is therefore able to retain the present limit, and at the current level.

However, we would recommend that the limit be revised immediately to the current level of vehicles and that a settling limit and moratorium be applied so that unused plates are extinguished as demand for their services continues to fall. It would be expected that the level of private hire vehicles would continue to reduce under market forces although this should be kept under review in case there was need for the hackney plates that were being extinguished to be available for re-use.

The need for a higher night tariff should be reviewed to attempt to shift some of the excess of daytime vehicles back towards servicing the now very different night demand profiles.

The issue that 20% of hackney carriage drivers have an exemption from servicing wheel chair demand should be considered further and those unable to provide the full service their vehicle can provide should be encouraged to work with other drivers to allow their wheel chair capabilities to be used as much as practicable. This is particularly important because so much use is currently observed of that facility in this area.

This report needs to be widely shared with other elements of the City particularly those developing overall transport policy to ensure that hackney carriages can continue to provide their essential service to the City and its visitors / businesses.



Plymouth

DfT stats suggest limit began 1999, actually at least 1975

	hcv	phv	lv total	hcd	phd	dd	total d		Ops	% hcv WAV	% phv WAV
1975	90	500	590					1975		100	
1976	90	400	490					1976		100	
1977/9	100	400	500					1977/9		100	
1980	175	300	475					1980		100	
1983	181	294	475	252	372		624	1983		100	
1985	181	285	466	255	358		613	1985		100	
1986	186	277	463	255	350		605	1986		100	
1987	201	281	482	258	319		577	1987		100	
1988	239	288	527	302	313		615	1988		100	
1989	290	278	568	339	279		618	1989		100	
1990	338	253	591	377	264		641	1990		100	
1991	352	261	613	417	287		704	1991		100	
1992	341	256	597	419	258		677	1992		100	
1993	340	240	580	411	259		670	1993		100	
1994D	342	270	612	416	281		697	1994D		100	
1995	341	299	640	401	329		730	1995		100	
1996	335	333	668	402	301		703	1996		100	
1997D	359	362	721	418	375		793	1997D		100	
1998	359	434	793	414	414		828	1998		100	
1999D	358	471	829	427	454		881	1999D	9	100	
2001D	360	643	1003	487	647		1134	2001D	12	100	
2004D	359	638	997	429	700	2	1131	2004D	12	100	
2005D	359	850	1209	490	850	3	1343	2005D	10	100	
2007D	360	722	1082	488	852		1340	2007D	11	100	
2009D	366	752	1118	480	857		1337	2009D	21	100	
2010N	366	814	1180	<u>465</u>	<u>825</u>		<u>1290</u>	2010N	<u>26</u>	100	
2011D	367	793	1160	450	793		1243	2011D	31	100	
2012N	366	767	1133	<u>443</u>	<u>816</u>		1259	2012C	<u>30</u>	100	
2013D	367	790	1157	436	839		1275	2013D	28	100	
2014N	367	794	1161	<u>421</u>	<u>844</u>		1265	2014N	<u>29</u>	100	

2015D	367	806	1173	406	849		1255	2015D	29	100	
2016	367	832	1199	394	863		1257	2016	31	100	
2017D	357	835	1192	392	838		1230	2017D	41	100	1.4
2018D	354	808	1162	386	812		1198	2018D	41	100	2
2018C	346	807	1153	387	803		1190	2018C	41	100	1.4

Appendix 2 – List of ranks

City Centre Area

Rank Number	Location	Hours of Operation	Spaces Available
1	Guildhall Square (Adjacent car park)	24 hours	3
2	Royal Parade (Theatre Royal)	24 hours	6
3	Royal Parade (Brass Monkey)	Midnight to 6am	2
4	Raleigh Street	24 hours	9 x 2 (18)
5	Cornwall Street West (Rank 1)	6pm to 6am	4
6	Cornwall Street West (Rank 2)	24 hours	4
7	Mayflower Street (Karma)	24 hours	4
8	Mayflower Street (Iceland)	24 hours	10
9	Mill Street (Good Companions)	24 hours	2
10	Charles Street	24 hours	3
11	Old Town Street	24 hours	14
12	Exeter Street	24 hours	4
13	Bretonside	24 hours	9
14	Whimble Street	24 hours	3
15	Princess Street	10pm to 8am	4
16	Finewell Street	24 hours	2
17	The Parade (rank 1)	24 hours	2
18	The Parade (rank 2)	9pm to 6am	6
19	Derry's Cross (Reel Cinema)	24 hours	2
20	Derry's Cross (Pizza Express)	24 hours	5
21	Union Street (Walkabout - South side)	11.30pm to 5.30am	9
22	Union Street (Genting Casino - North side)	11.30pm to 5.30am	9
23	Martin Street	9pm to 6am	10
24	The Octagon	24 hours	3
25	Western Approach	Midnight to 6am	8
26	Union Street (Dance Academy)	8pm to 6am	8
27	Tavistock Place	8pm to 8am	4
28	Derry's Cross (Dial a Ride)	6pm to 6am	3
29	Armada Way	24 hours	2
30	The Barbican (Mayflower Centre)	6pm to 6am	4

Suburban Area

Rank Number	Location	Hours of Operation	Spaces Available
31	Admirals Hard (Cremyll ferry)	24 hours	2
32	Albert Road (Dockyard)	24 hours	4
33	Cross Park Road	24 hours	2
34	Ferry Road (Torpoint ferry)	24 hours	12
35	Saltash Road	24 hours	3
36	Wolseley Road	24 hours	5
37	St. Levan Road	24 hours	4
38	Church Street	24 hours	2
39	Ridgeway (Post Office PH)	24 hours	3
39A	Ridgeway (Joshua Reynolds PH)	24 hours	2
40	Derriford Hospital	24 hours	3
41	Mutley Plain 1 (Top End Taxi Shelter)	24 hours	3
42	Mutley Plain 2 (Middle Bus Layby)	8pm to 6am	3
43	Mutley Plain 3 (Mutley Crown)	8pm to 6am	3
44	Houndiscombe Road	24 hours	3
45	Plymouth Train Station (Permits Only)	24 hours	15
46	Drake Circus (University)	Midnight to 6am	3
47	North Hill (Adjacent Sherwell Arcade)	6pm to 6am	5
48	Madden Road	24 hours	3
49	Plymstock Broadway Car Park	24 hours	2
50	Barbican Approach Road	11pm to 5am	4

Total 253

Appendix 3 – Timetable of rank observations

Please see separate document

Appendix 4 – Detailed rank observation results

Please see separate document

Appendix 5 – Detailed on street interview results

Please see separate document





Appendix 6 List of Stakeholders consulted

Key consultee	Response
Supermarkets	
Co-operative Wilton St	Y
Morrison's Outland Rd	Y
Tesco Transit Way Superstore	Y
Iceland Mayflower St	Y
Iceland, Plymstock Shopping Centre	Y
Co-op, St Budeaux Shopping Centre	Y
Sainsbury's, Armada Centre	N
Morshea Road Post Office	N
Asda Plymouth Supercentre	N
Hotels	
Duke of Cornwall Hotel	Y
The Drake	Y
Ashgrove House	Y
Invicta Hotel	R
Barbican Reach	R
Restaurants / Cafes	
The Waterfront	Y
JD's Grill	Y
The Chancel	Y
Wildwood	Y
River Cottage	Gone
The Artillery Tower	R
Seco Lounge	R
Entertainment	
Tenpin Bowling Barbican	R
Crown Hill Library	R
Reel Cinema, Derry's Cross	Gone
Theatre Royal	Y
Public Houses	
Annabelles	Y
Brass Monkey, City Centre	Y
Maritime Inn, Parade, Barbican	Y
The Bank	Y
Kitty O'Hanlon's	Y
Two Trees, City Centre	Gone
Tamar, Crownhill	R
The Ship, Parade, Barbican	N
The Read and Roses Free House	N
The Navy Inn	N

Night Clubs	
Pryzm	N
Jesters	N
Switch	N
Popworld	N
Other key stakeholder groups	
Plymouth Guild	N
Cattewater Harbour Commissers	N
Plymouth Citizens Advice Bureau	N
Devon and Plymouth Chamber of Commerce	N
National Marine Aquarium	N
Police	Y
Age UK Plymouth	Y
Plymouth University	Y
Access Plymouth	N
PADAN	N
Highbury Trust	N
NHS Plymouth	N
National Express	N
Plymouth Marjon University	N
GWR, Plymouth	N
Various Plymouth City Officers	N
Taxi first	N
Need A Cab	N
Ridge Cabs	N
PLTA	(N)

