

Braintree District Council
Hackney Carriage Demand Survey
Final Report
June 2009

Halcrow Group Limited

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Braintree District Council

Hackney Carriage Demand Survey

Final Report

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1 Study Objectives and Overview

1.1 *General*

1.1.1 This study has been conducted by Halcrow on behalf of Braintree District Council in pursuit of the following objectives:

- to identify whether or not there exists a significant unmet demand for hackney carriage services in Braintree District; and
- to recommend the increase in licences required to eliminate any significant unmet demand.

1.1.2 In 2006 the DfT produced 'Best Practice Guidance' for taxi licensing. The guidance also restated that the DfT considers it to be best practice not to impose quantity restrictions. However where restrictions are imposed, the Department urges that the matter is regularly reconsidered.

1.1.3 The DfT guidance is just that, guidance. We are unaware of any actual (or proposed) change in legislation that would affect the legal standing of an entry control policy in the context of local hackney carriage markets. The large body of well established case law and precedent should be unaffected by this guidance. Notwithstanding this, the local authority may wish to take this guidance into consideration when determining its policy, particularly given the forthright way in which DfT chooses to express its views on entry control in Paragraph 31:

'Most local licensing authorities do not impose quantity restrictions; the Department regards that as best practice.'

2 Background

2.1 *General*

2.1.1 This section of the report provides a general background to the taxi market in Braintree District and the relevant legislation governing the market. This section of the report also provides a background to relevant local policy.

2.2 *Relevant Entry Control Regulations*

2.2.1 Under the Town Police Clauses Act 1847, a licensing authority had an unfettered discretion to limit the number of hackney carriage licences by being able to licence only such numbers as it thought fit. It was a power, which was widely used by many authorities to restrict the numbers of hackney carriages for the purpose of exercising control and supervision over them. Under the Transport Act 1985, the position in law changed and the 1847 Act, as now amended by Section 16, provides as follows:

“That the grant of a licence may be refused for purposes of limiting the number of hackney carriages..., if but only if, the person authorised to grant a licence is satisfied that there is no significant demand for the services of hackney carriages... which is unmet”.

2.2.2 The Act also provides for an appeals procedure whereby unsuccessful applicants for hackney carriage licences may call upon an authority to demonstrate that it is satisfied that there exists no significant unmet demand. If, in the eyes of the Court, the Authority fails to meet this requirement, the appeal against the refusal to issue a licence will be successful.

2.3 *Braintree District Overview*

2.3.1 The District of Braintree is located in Essex with a population of 140,900. The district is made up of a number of settlements including Braintree, Witham and Halstead. Braintree District Council has outlined plans for the regeneration of parts of Braintree, Witham and Halstead in the *Three Towns, One Vision* document. It is their aim to “unlock the hidden potential of neglected areas of each town,” in the hope of encouraging new development, investment and visitors to the area.

2.4 *Background to the Hackney Carriage Market in Braintree District*

2.4.1 Braintree District Council limits the number of Hackney carriages, and the level has been set at 84. This gives a level of hackney carriage provision of one vehicle per 1,677 resident population. Hackney carriages in Braintree District are either purpose built cabs or saloon vehicles with a roof sign.

2.4.2 The private hire fleet consists of 197 vehicles. In view of the size of this fleet relative to the hackney carriage fleet, it is evident that this is the dominant force in the Braintree District taxi market.

2.5 *Provision of Hackney Carriage Stands*

2.5.1 There are 4 main taxi ranks in Braintree District providing space for a total of 78 vehicles. A further 2 ranks are licensed although not used. A list of the ranks is in Appendix 1. Plates 1 and 2 picture some of the ranks.

Plate 1 Manor Street Rank, Braintree



Plate 2 Station Rank, Braintree



2.6

Hackney Carriage Fares and Licence Premiums

2.6.1

Hackney carriage fares are regulated by the Local Authority. There are three tariffs. Tariff 1 consists of any journey (except Sundays or bank holidays). Tariff 2 consists of Sundays, bank holidays and between 6pm and 11pm on Christmas Eve and New Years Eve. Tariff 3 is for hirings between 11pm on Christmas and New Years Eve and 6am on the day succeeding Boxing Day and New Years Day. There are a series of additional charges for, extra passengers or fouling of the vehicle interior.

2.6.2

Tariff 1 is made up of three elements; an initial fee (or “drop”) of £2.60 for entering the vehicle and travelling any distance up to 704 yards. For each additional 117.3 yards travelled the fee is 10p and each minute of waiting time is charged at 30p. A two-mile fare for tariff 1 would therefore be £5.00. Tariff 2 charges 50% more than tariff 1 therefore a 2 mile fare would cost £7.50. Tariff 3 charges 100% more than tariff 1, therefore a 2 mile fare would cost £10. Table 2.1 outlines the fare structure in more detail.

Table 2.1: Braintree District Hackney Carriage Fare Tariff 2009

	Price
Mileage Tariff 1	
Initial fee for any distance travelled up to 643.7meters	£2.60
For each subsequent 107.3meters or uncompleted part thereof	10p
For each period of 1 minute or uncompleted part thereof	30p
Mileage Tariff 2 (Between 11pm and 6am on a Sunday or public holiday, 24th and 31st December)	
A charge of 50% extra (i.e. one and a half times) the tariff 1 fare will be charged.	
Mileage Tariff 3 (Between 11pm on Christmas Eve and New Years Eve and 6am on the day succeeding Boxing Day and New Years Day)	
A charge equivalent of 100% extra (i.e. double) of the tariff 1 charged.	
Other Charges	Standard Charge
Soiling Fee	£30
Carriage of 5 persons or more	Tariff 2

Source: Braintree District Council

2.6.3

In the published monthly league table, Braintree District is ranked 142 of the 377 authorities cited (Private Hire and Taxi Monthly, June 2009). The monthly league table ranks all local authorities in the United Kingdom according to the price of a 2 mile taxi fare. Fares in Braintree District are higher than what is typical elsewhere across the UK. Table 2.1 provides a comparison of where neighbouring authorities rank in terms of fares.

Table 2.2: Comparison of Neighbouring Authorities in Terms of Fares (figures are ranked out of a total of 377 Authorities with 1 being the most expensive)

Local Authority	Rank
Colchester	1
Chelmsford	31
Brentwood	57
South Cambridge	68
Harlow	100
Tendring	133
Braintree District	142
St Edmundsbury	198
Basildon	199
Babergh	223
Uttlesford	265

Source: Private Hire and Taxi Monthly, June 2009

- 2.6.4 Where local hackney carriage markets are subject to both price and entry regulation, it has commonly been the case that a rent accrues to the ownership of the vehicle licence. This rent or “premium” is difficult to assess accurately as the re-sale of vehicle licences is not encouraged by the Authority. The Authority estimates through anecdotal evidence that the resale value of a licence in Braintree District is between £14,000 and £16,000.
- 2.6.5 The existence of a licence premium is evidence of “excess” profit; that is, profit that would not exist if the level of supply of hackney carriages was determined by the market rather than by the Regulator. Licence premiums do not exist in Authorities where quantity controls are absent. This does not mean that we judge hackney carriage proprietors in Braintree District to be making too much money. It is not within our remit to comment on what is or is not an appropriate rate of remuneration from hackney carriage operation. The term “excess” profit simply means that earnings from plying for hire are higher at present than they would be if a free entry policy was introduced.
- 2.6.6 Although a premium is a clear indicator of higher than “market” profits it is not necessarily an indicator of significant unmet demand. Where a premium exists, this may

be due to the fact that cabs are not having to wait a long time for fares which are associated with under-supply of vehicles, and hence passenger delays. Alternatively, it may be due to a fares level, which is higher than the break-even level for a given supply. Finally, it may simply be a reflection of the absence of alternative means of gaining employment.

2.7

Local Transport Plan

2.7.1

The Essex Local Transport Plan 2006-2011 was produced in March 2006 and incorporates five Area Transport Delivery Strategies based around the important local centres and key inter-urban road and rail networks. The different areas include; North Essex (Braintree), Haven Gateway, Heart of Essex, Thames Gateway and Hertfordshire. Local Authorities are required to produce a Local Transport Plan for developing local integrated transport as part of a longer term vision for the area.

2.7.2

The aim of the plan is to ease congestion, improve accessibility, air quality and safety.

Impact of LTP on taxi trade

2.7.3

The LTP states that a Quality Taxi Partnership scheme has been developed in some areas of the county and there are plans to implement it in others in order to provide a safe and reliable private hire service. Braintree District Council has established a Quality Taxi Partnership which is in its early stages of progress. Quality Taxi Partnership's are an important part of achieving the LTP's aim of improving accessibility across the County. The LTP recognises that taxis are important in providing an essential role in the public transport network and in providing a key link to services for people who might not otherwise have access to them.

3 Definition, Measurement and Removal of Significant Unmet Demand

3.1 *Introduction*

3.1.1 Section 3 provides a definition of significant unmet demand derived from experience of over 100 unmet demand studies since 1987. This leads to an objective measure of significant unmet demand that allows clear conclusions regarding the presence or absence of this phenomenon to be drawn. Following this, a description is provided of the SUDSIM model which is a tool developed to determine the number of additional hackney licences required to eliminate significant unmet demand, where such unmet demand is found to exist.

3.2 *Overview*

- Significant Unmet Demand (SUD) has two components:
- patent demand – that which is directly observable; and
- “suppressed” demand – that which is released by additional supply.

3.2.1 Patent demand is measured using rank observation data. Suppressed (or latent) demand is assessed using data from the rank observations and public attitude interview survey. Both are brought together in a single measure of unmet demand, ISUD (Index of Significant Unmet Demand).

3.3 *Defining Significant Unmet Demand*

3.3.1 The provision of evidence to aid licensing authorities in making decisions about hackney carriage provision requires that surveys of demand be carried out. Results based on observations of activity at hackney ranks have become the generally accepted minimum requirement.

3.3.2 The definition of significant unmet demand is informed by two Court of Appeal judgements:

- R v Great Yarmouth Borough Council ex p Sawyer (1987); and
- R v Castle Point Borough Council ex p Maude (2002).

3.3.3 The Sawyer case provides an indication of the way in which an Authority may interpret the findings of survey work. In the case of Sawyer v. Yarmouth City Council, 16 June 1987, Lord Justice Woolf ruled that an Authority is entitled to consider the situation from a temporal point of view as a whole. It does not have to condescend into a detailed consideration as to what may be the position in every limited area of the Authority in

relation to the particular time of day. The area is required to give effect to the language used by the Section (Section 16) and can ask itself with regard to the area as a whole whether or not it is satisfied that there is no significant unmet demand.

3.3.4 The term “suppressed” or “latent” demand has caused some confusion over the years. It should be pointed out that following *Maude v Castle Point Borough Council*, heard in the Court of Appeal in October 2002, the term is now interpreted to relate purely to that demand that is measurable. Following *Maude*, there are two components to what Lord Justice Keene prefers to refer to as “suppressed demand”:

- what can be termed inappropriately met demand. This is current observable demand that is being met by, for example, private hire cars illegally ranking up; and
- that which arises if people are forced to use some less satisfactory method of travel due to the unavailability of a hackney carriage.

3.3.5 If demand remained at a constant level throughout the day and week, the identification and treatment of significant unmet demand would be more straight-forward. If there were more cabs than required to meet the existing demand there would be queues of cabs on ranks throughout the day and night and passenger waiting times would be zero. Conversely, if too few cabs were available there would tend to be queues of passengers throughout the day. In such a case it would, in principle, be a simple matter to estimate the increase in supply of cabs necessary to just eliminate passenger queues.

3.3.6 Demand for hackney carriages varies throughout the day and on different days. The problem, introduced by variable demand, becomes clear when driver earnings are considered. If demand is much higher late at night than it is during the day, an increase in cab supply large enough to eliminate peak delays will have a disproportionate effect on the occupation rate of cabs at all other times. Earnings will fall and fares might have to be increased sharply to sustain the supply of cabs at or near its new level.

3.3.7 The main implication of the present discussion is that it is necessary, when considering whether significant unmet demand exists, to take account of the practicability of improving the standard of service through increasing supply.

3.4 *Measuring Patent Significant Unmet Demand*

3.4.1 Taking into account the economic, administrative and legal considerations, the identification of this important aspect of significant unmet demand should be treated as a three stage process as follows:

- identify the demand profile;
- estimate passenger and cab delays; and
- compare estimated delays to the demand profile.

3.4.2 The broad interpretation to be given to the results of this comparison are summarised in Table 3.1.

Table 3.1: Existence of Significant Unmet Demand (SUD) Determined by Comparing Demand and Delay Profiles.

	Delays during peak only	Delays during peak and other times
Demand is:		
Highly Peaked	No SUD	Possibly a SUD
Not Highly Peaked	Possibly a SUD	Possibly a SUD

3.4.3 It is clear from the content of the table that the simple descriptive approach fails to provide the necessary degree of clarity to support the decision making process in cases where the unambiguous conclusion is not achievable. However, it does provide the basis of a robust assessment of the principal component of significant unmet demand. The analysis is therefore extended to provide a more formal numerical measure of significant unmet demand. This is based on the principles contained in the descriptive approach but provides greater clarity. A description follows.

3.4.4 The measure feeds directly off the results of observations of activity at the ranks. In particular it takes account of:

- case law that suggests an authority should take a broad view of the market;
- the effect of different levels of supply during different periods at the rank on service quality;
- the need for consistent treatment of different authorities, and the same authority over time.

3.4.5

The Index of Significant Unmet Demand (ISUD) was developed in the early 1990's and is based on the following formula. The SF element was introduced in 2003 and the LDF element was introduced in 2006 to reflect the increased emphasis on latent demand in DfT Guidance

$$\text{ISUD} = \text{APD} \times \text{PF} \times \text{GID} \times \text{SSP} \times \text{SF} \times \text{LDF}$$

Where:

APD = Average Passenger Delay calculated across the entire week.

PF = Peaking Factor. If passenger demand is highly peaked at night the factor takes the value of 0.5. If it is not peaked the value is 1. Following case law this provides dispensation for the effects of peaked demand on the ability of the Trade to meet that demand. To identify high peaking we are generally looking for demand at night (at weekends) to be substantially higher than demand at other times.

GID = General Incidence of Delay. This is measured as the proportion of passengers who travel in hours where the delay exceeds one minute.

SSP = Steady State Performance. The corollary of providing dispensation during the peaks in demand is that it is necessary to focus on performance during "normal" hours. This is measured by the proportion of hours during weekday daytimes when the market exhibits excess demand conditions (i.e. passenger queues form at ranks).

SF = Seasonality factor. Due to the nature of these surveys it is not possible to collect information throughout an entire year to assess the effects of seasonality. Experience has suggested that hackney demand does exhibit a degree of seasonality and this is allowed for by the inclusion of a seasonality factor. The factor is set at a level to ensure that a marginal decision either way obtained in an "untypical" month will be reversed. This factor takes a value of 1 for surveys conducted in September to November and March to June, i.e. "typical" months. It takes a value of 1.2 for surveys conducted in January and February and the longer school holidays, where low demand the absence of contract work will bias the results in favour of the hackney trade, and a value of 0.8 for surveys conducted in December during the pre Christmas rush of activity. Generally, surveys in these atypical months, and in school holidays, should be avoided.

LDF = Latent Demand Factor. This is derived from the public attitude survey results and provides a measure of the proportion of the public who have given up trying to obtain a hackney carriage at either a rank or by flagdown during the previous three months. It is measured as 1+ proportion giving up waiting. The inclusion of this factor is a tactical response to the latest DfT guidance.

3.4.6 The product of these six measures provides an index value. The index is exponential and values above the 80 mark have been found to indicate significant unmet demand. This benchmark was defined by applying the factor to the 25 or so studies that had been conducted at the point it was developed. These earlier studies had used the same principles but in a less structured manner. The highest ISUD value for a study where a conclusion of no significant unmet demand had been found was 72. The threshold was therefore set at 80. The ISUD factor has been applied to over 80 studies by Halcrow and has been adopted by others working in the field. It has proved to be a robust, intuitively appealing and reliable measure.

3.4.7 Suppressed/latent demand is explicitly included in the above analysis by the inclusion of the LDF factor and because any known illegal plying for hire by the private hire trade is included in the rank observation data. This covers both elements of suppressed/latent demand resulting from the Maude case referred to above and is intended to provide a 'belt and braces' approach. A consideration of latent demand is also included where there is a need to increase the number of hackney carriage licences following a finding of significant unmet demand. This is discussed in the next section.

3.5 *Determining the Number of New Licences Required to Eliminate Significant Unmet Demand*

3.5.1 To provide advice on the increase in licences required to eliminate significant unmet demand, Halcrow has developed a predictive model. SUDSIM is a product of 20 years experience of analysing hackney carriage demand. It is a mathematical model, which predicts the number of additional licences required to eliminate significant unmet demand as a function of key market characteristics.

3.5.2 SUDSIM represents a synthesis of a queue simulation work that was previously used (1989 to 2002) to predict the alleviation of significant unmet demand and the ISUD factor described above (hence the term SUDSIM). The benefit of this approach is that it

provides a direct relationship between the scale of the ISUD factor and the number of new hackney licences required.

3.5.3

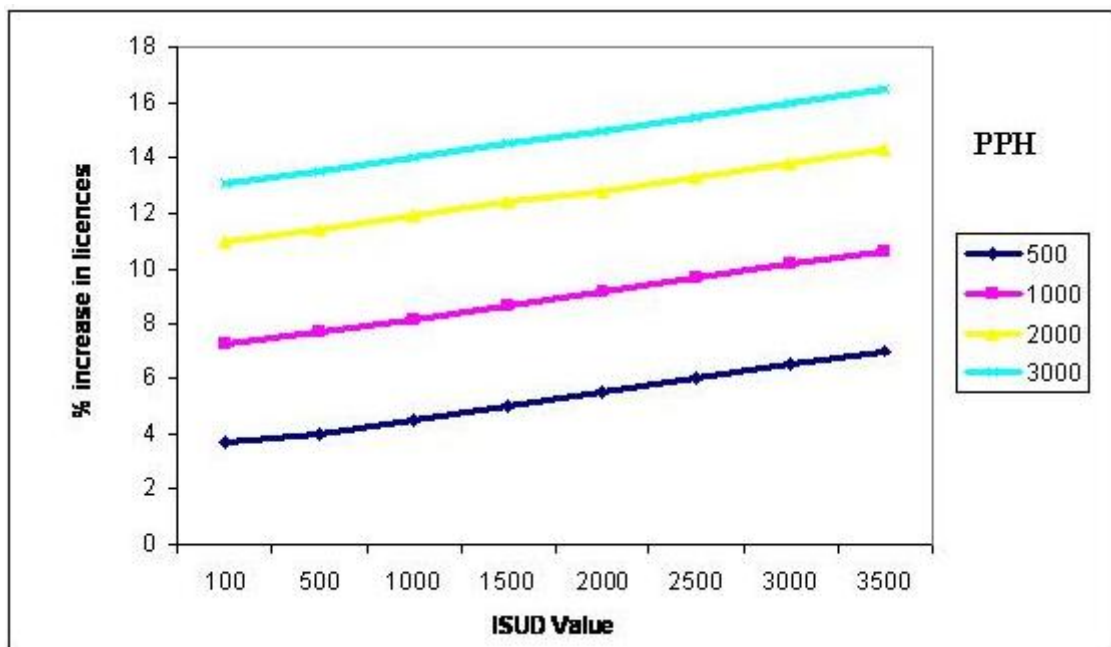
SUDSIM was developed taking the recommendations from 14 previous studies that resulted in an increase in licences, and using these data to calibrate an econometric model. The model provides a relationship between the recommended increase in licences and three key market indicators:

- the population of the licensing Authority;
- the number of hackneys already licensed by the licensing Authority; and
- the size of the SUD factor.

3.5.4

The main implications of the model are illustrated in Figure 3.1 below. Figure 3.1 shows that in order to eliminate significant unmet demand an increase in licences is required. This increase is positively related to the population per hackney (PPH) ratio and the value of the ISUD factor identified in the report.

Figure 3.1: Forecast Increase in Hackney Fleet Size as a Function of Population Per Hackney (PPH) and the ISUD Value



3.5.5 Where significant unmet demand is identified, the recommended increase in licences is therefore determined by the following formula:

$$\text{New Licences} = \text{SUDSIM} \times \text{Latent Demand Factor}$$

Where:

- Latent Demand Factor = (1 + proportion giving up waiting for a hackney at either a rank or via flagdown)

3.6 *Note on Scope of Assessing Significant Unmet Demand*

3.6.1 It is useful to note the extent to which a licensing authority is required to consider peripheral matters when establishing the existence or otherwise of significant unmet demand. This issue is informed by *R v Brighton Borough Council, ex p Bunch 1989*¹. This case set the precedent that it is only those services that are exclusive to hackney carriages that need concern a licensing authority when considering significant unmet demand. Telephone booked trips, trips booked in advance or indeed the provision of bus type services are not exclusive to hackney carriages and have therefore been excluded from consideration.

¹ See Button JH 'Taxis – Licensing Law and Practice' 2nd edition Tottel 2006 P226-7

4 Evidence of Patent Unmet Demand – Rank Observation Results

4.1 *Introduction*

4.1.1 This section of the report highlights the results of the rank observation survey. The rank observation programme covered a period of 130 hours. During the hours observed some 3,896 passengers and 4,100 cab departures were recorded. The rank observations were carried out from Tuesday 10th February to Saturday 28th February. A summary of the rank observation programme is provided in Appendix 2.

4.1.2 The results presented in this Section summarise the information and draw out its implications. This is achieved by using five indicators:

- The Balance of Supply and Demand – this indicates the proportion of the time that the market exhibits excess demand, equilibrium and excess supply;
- Average Delays and Total Demand – this indicates the overall level of passengers and cab delays and provides estimates of total demand;
- The Demand/Delay Profile – this provides the key information required to determine the existence or otherwise of significant unmet demand;
- The Proportions of Passengers Experiencing Given Levels of Delay – this provides a guide to the generality of passenger delay; and
- The Effective Supply of Vehicles – this indicates the proportion of the fleet that was off the road during the survey.

4.2 *The Balance of Supply and Demand*

4.2.1 The results of the analysis are presented in Table 4.1 below. The predominant market state is one of equilibrium. Excess supply (queues of cabs) was experienced during 30% of the hours observed while excess demand (queues of passengers) was experienced in 1% of hours. Conditions are most favourable to customers during weekend days and nights. Conditions were least favourable to customers on weekday nights.

Table 4.1: The Balance of Supply and Demand in the Braintree Rank-Based Hackney Carriage Market (Percentages – Rows Sum to 100)

Period		Excess Demand	Equilibrium	Excess Supply
Weekday	Day	0	72	28
	Night	4	85	11
Weekend	Day	0	56	44
	Night	0	61	39
Sunday	Day	0	69	31
All 2009		1	69	30

NB – Excess Demand = Maximum Passenger Queue ≥ 3 . Excess Supply = Minimum Cab Queue ≥ 3 – values derived over 12 time periods within an hour.

4.3

Average Delays and Total Demand

4.3.1

The following estimates of average delays and throughput were produced for each of the main ranks in Braintree (Table 4.2). The table shows the following information:

- *Passenger Departures* – The number of passengers departing the rank in a taxi;
- *Cab Departures* – The number of cabs departing the taxi rank. This can be with or without passengers;
- *Average Passenger Delay* – The average delay for passengers waiting for a taxi at a rank calculated across an entire week; and
- *Average Cab Delay* – The average delay for cabs waiting for a passenger fare at a taxi rank calculated across an entire week.

4.3.2

The survey suggests some 3,896 passenger departures occur per week from ranks in Braintree involving some 4,100 cab departures.

4.3.3

The hackney carriage trade is somewhat concentrated at Manor Street in Braintree, and Albert Road in Witham accounting for 51.2% and 36.3% of the total. On average, passengers wait 0.14 minutes for a cab. Passengers experience the greatest delay at the Albert Road rank in Witham, where an average delay of 0.32 minutes (19.2 seconds) was experienced.

Table 4.2: Average Delays and Total Demand (Delays in Minutes)

Rank	Passenger Departures	Cab Departures	Average Passenger Delay	Average Cab Delay
Albert Road, Witham	1,415	1,347	0.32 (19.2 secs)	22.07
Manor Street, Braintree	1,995	1,989	0.00 (0.0 secs)	23.16
Station Approach, Braintree	298	538	0.28 (16.8 secs)	11.59
Trinity Street, Halstead	188	225	0.00 (0.0 secs)	18.35
Total	3,896	4,100	0.14 (8.4 secs)	21.02

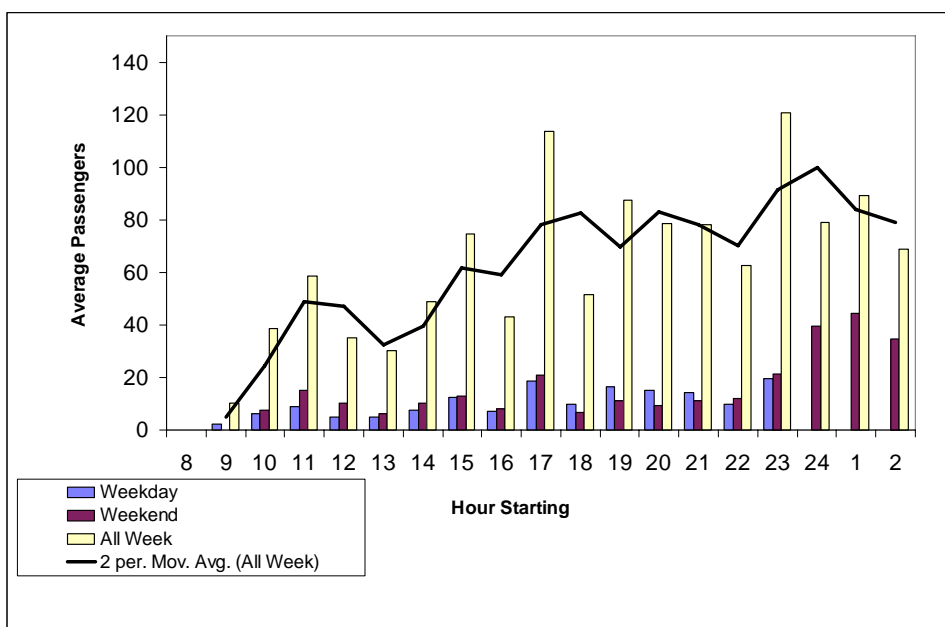
4.4

The Delay/Demand Profile

4.4.1

Figure 4.1 provides a graphical illustration of passenger demand for the Monday to Saturday period between the hours of 08:00 and 03:00. There is a peak demand during the week between the hours of 1700 and 1800, 2300 and 0000. The peak demand at the weekend is concentrated between 0000 and 0300.

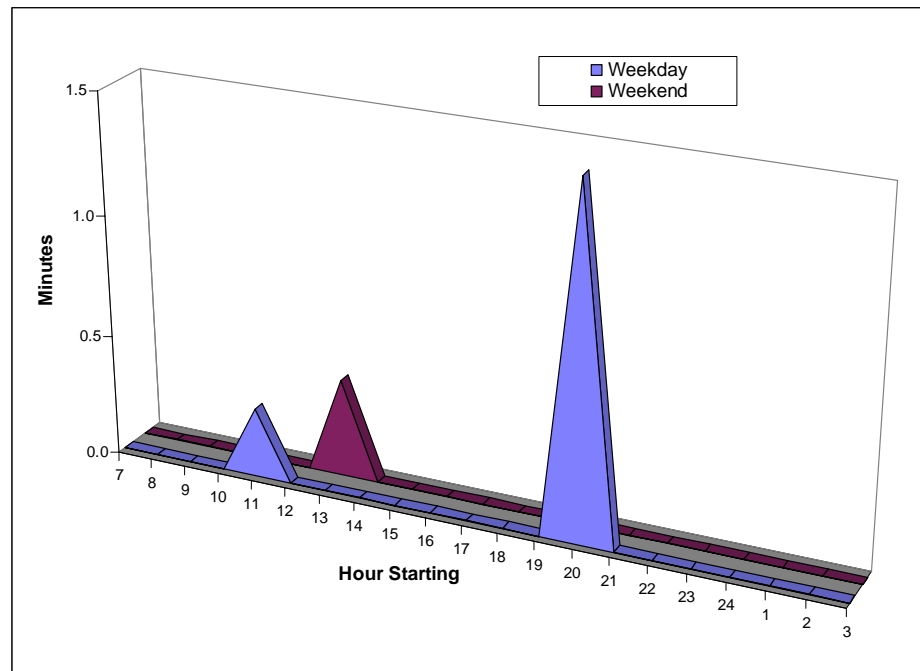
Figure 4.1: Passenger Demand by Time of Day in 2008 (Monday to Saturday)



4.4.2 The level of peaking late at night relative to the daytime is not high; we therefore conclude that this is not a 'highly peaked' demand profile.

4.4.3 Figure 4.2 provides an illustration of passenger delay by the time of day for the weekday and weekend periods. It indicates incidences of passenger delay peak on weekdays between 1000 - 1200 and 1900 - 2100 and weekends between 1200 and 1400. The level of passenger delay is greatest between 1900 and 2100 on weekdays at a peak of 1.44 minutes.

Figure 4.2: Passenger Delay by Time of Day in 2008 (Monday to Saturday)



4.5 *The generality of passenger delay*

4.5.1 The rank observation data can be used to provide a simple assessment of the likelihood of passengers encountering delay at ranks. The results are presented below.

- Delay > 0 - 1.51%
- Delay > 1 minute - 1.51%
- Delay > 5 Minutes - 0.00%

4.5.2 The results indicate that 1.51% of the passengers observed using a rank travelled in an hour where some delay occurred at that rank. The proportion likely to experience more

than a minute of delay is estimated at 1.51%. It is this proportion that is used within the ISUD as the 'Generality of Passenger Delay.'

5 Evidence of Suppressed Demand - Public Attitude Pedestrian Survey Results

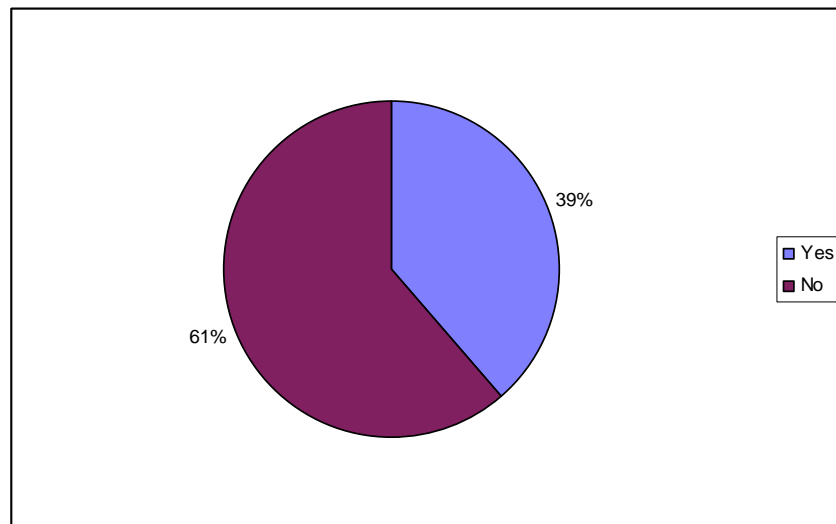
5.1 Introduction

5.1.1 Some 520 on-street public interview surveys were carried out in February and March 2009. A quota was followed so that the survey reflected the age and gender characteristics of the local community. This, in turn, ensured that broadly representative results were obtained. For the purpose of the survey the generic word ‘taxi’ was used which incorporated both hackney carriages and private hire vehicles.

5.1.2 A full breakdown and analysis of the results and the survey form are provided in Appendix 3.

5.1.3 The survey found that 38.5% of respondents had used a taxi in Braintree District within the last three months. The results are displayed in Figure 5.1.

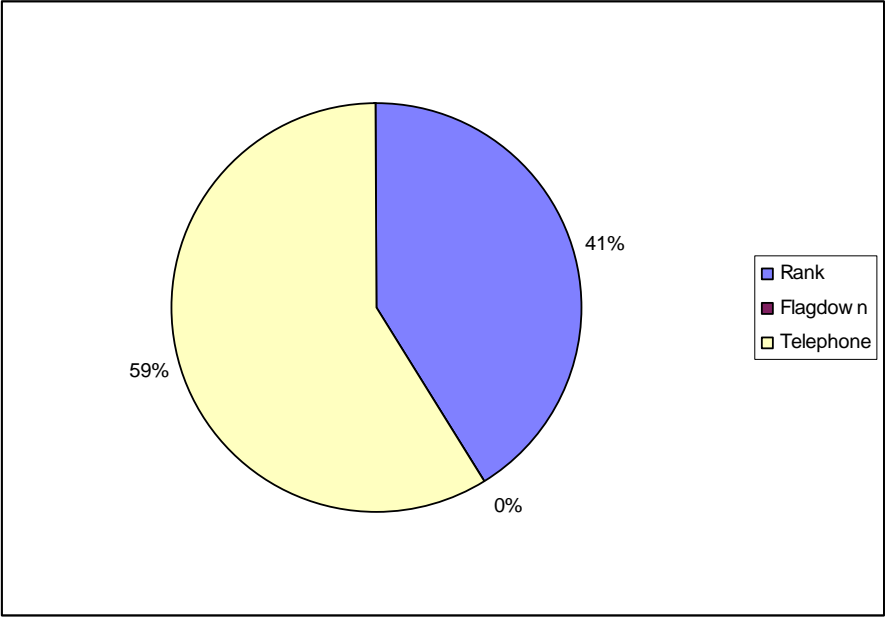
Figure 5.1: Made a trip by taxi in the last 3 months



5.1.4 Tripmakers were asked how they obtained their taxi. Some 41% of tripmakers stated that they hired their taxi at a rank. Some 59% of hirings were achieved by telephone with

no tripmakers obtaining a taxi by on-street flagdown. Figure 5.2 reveals the pattern of taxi hire.

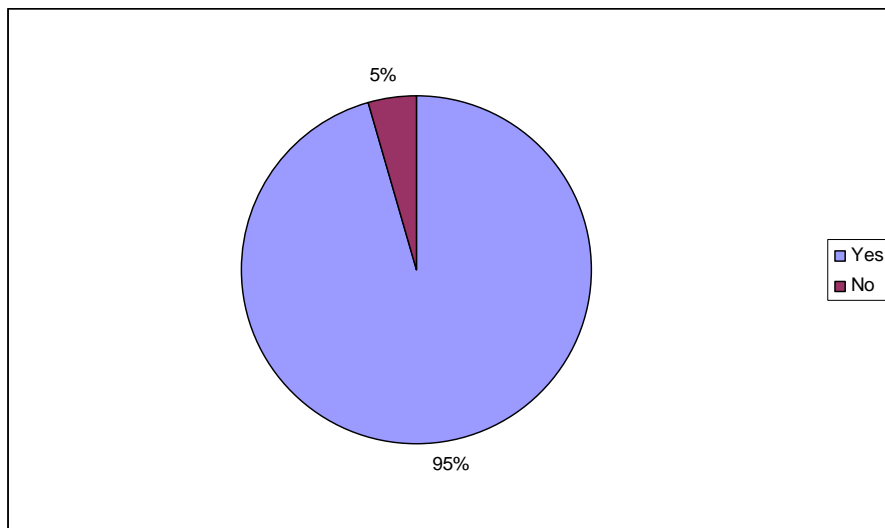
Figure 5.2: Method of Hire for Last Trip



5.1.5

Respondents were asked if they were satisfied with the time taken and the promptness of the taxi arrival. The majority of people were satisfied with the delay on their last taxi journey (95.5%) as indicated in figure 5.3.

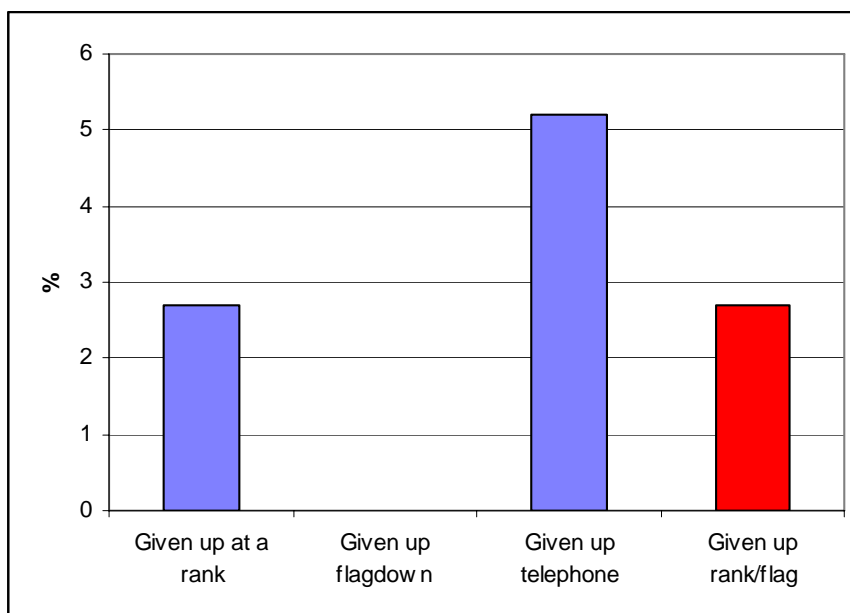
Figure 5.3: Satisfaction with Delay on last trip



5.1.6

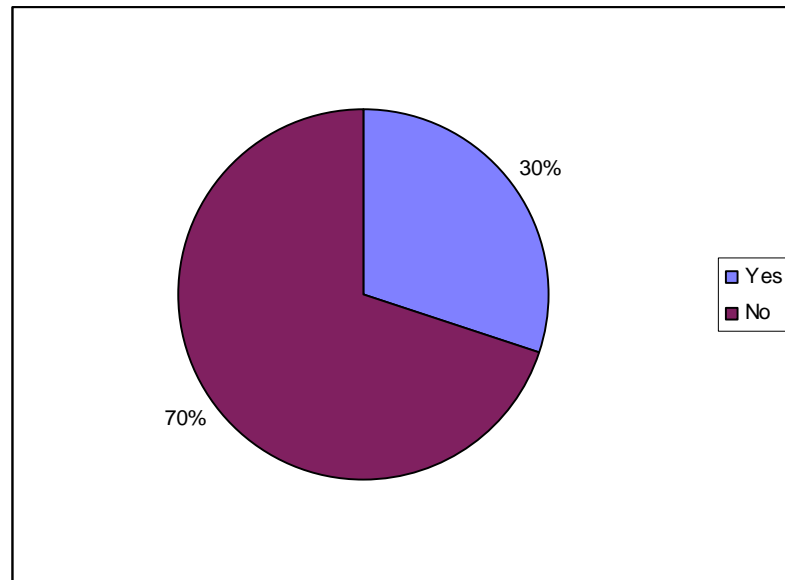
To provide evidence relating to suppressed demand respondents were asked to identify whether or not they had given up waiting for a taxi at a rank, on the street, or by telephone in Braintree District in the last three months. The results are documented in Figure 5.4.

Figure 5.4: Latent demand by method of hire – Given up trying to make a hiring?



- 5.1.7 Figure 5.4 highlights that 2.7% had given up waiting for a taxi at a rank, none had attempted to flag a taxi and 5.2% had given up via telephone. Therefore some 2.7% of respondents had given up attempting to hire a vehicle by either a rank or by flagdown in the last 3 months.
- 5.1.8 Those who had given up waiting for a vehicle in Braintree District were asked for this location. The most popular locations were:
- Trinity Street, Halstead;
 - Freeport, Braintree;
 - Halstead Road, Braintree;
 - Halstead Road, Halstead and
 - Manor Street, Braintree.
- 5.1.9 The majority of respondents (91.2%) were waiting for any type of vehicle, whilst 2.9% were waiting for a wheelchair accessible vehicle.
- 5.1.10 Respondents were asked if they thought the taxi service in Braintree District could be improved. The responses indicate that 29.9% of respondents thought that taxi services in Braintree District could be improved. The results are documented in Figure 5.5.

Figure 5.5: Could taxi services be improved?



5.1.11

Those who considered that taxi services required improvement were asked how they could be improved. Of those stating that the service could be improved some 33.8% of responses stated that taxis in Braintree could be cheaper. Some 16.9% stated that there was a need for more taxis 45.1% stating that there was an 'other' way in which services could be improved. Suggestions included:

- *'Taxis should have access to the High Street in Braintree'*
- *'Shelters at ranks'*
- *'Consistent fares'*
- *'Reliable and punctual service'*

5.2

Safety & Security

5.2.1

Respondents were asked whether they felt safe when using taxis in Braintree. The majority of respondents felt safe using taxis during the day (96.7%); and some 85% stated that they felt safe using taxis at night in Braintree.

5.2.2

Respondents who did not feel safe during the day or at night were asked what needed to be done to improve safety and security when using taxis in Braintree. Of the respondents who felt unsafe during the day and/or at night using taxis, some 49.9% of

responses stated that women drivers and 33.8% said CCTV in taxis would improve safety.

5.3

Ranks

5.3.1

The survey asked if there were any locations where respondents would like to see a new rank. Some 17.3% of respondents wanted to see additional ranks. Those individuals who stated they would like to see a new rank were subsequently asked to provide a location. The most popular locations were:

- High Street, Braintree;
- Central Halstead;

Summary

Key results from the Public Attitude Survey can be summarised as:

- Over 59% of hirings are by telephone;
- High levels of satisfaction with the time taken for the taxi to arrive on last trip (95.5%);
- Only 2.7% of respondents had given up trying to obtain a vehicle by rank or flagdown;
- 29.9% of respondents feel that taxi services in Braintree could be improved (need to be cheaper); and
- Over 96% of respondents felt safe using taxis during the day and night.

6 Consultation

6.1 *Introduction*

6.1.1 Guidelines issued by the Department for Transport state that consultation should be undertaken with the following;

- all those working in the market;
- consumer and passenger (including disabled) groups;
- groups which represent those passengers with special needs;
- the Police;
- local interest groups such as hospitals or visitor attractions; and
- a wide range of transport stakeholders such as rail/bus/coach operators and transport managers.

6.2 *Direct Consultation*

6.2.1 A series of focus groups were held in March 2009 with a range of stakeholders to glean their views regarding the taxi and private hire service across the district of Braintree.

Braintree Chamber of Commerce / District Planning

6.2.2 Below are the unsubstantiated views of representatives from Braintree's Chamber of Commerce and a District Planning Officer attended the focus group. The representatives commented that the availability of hackney carriages and private hire in Braintree District is good at most times and it is rare not to be able to obtain one. The one exception is the evening peak from 5pm-6pm when taxis are particularly difficult to obtain from outside the station. The demand at Braintree rail station is also low with only one train arriving per hour.

6.2.3 The representatives felt that it is often difficult for disabled people to hire taxis between 8:45am and 9:15am on weekdays. This is because most cars, both hackney carriage and private hire, have fixed term contracts to do school runs. Some vehicles were also perceived as quite difficult to access as Wheelchair Accessible Vehicles (WAVs) have a large step up to the vehicle. This can be a problem for the elderly and people with non wheelchair binding mobility impairments. In such cases most drivers are happy to assist mobility impaired passengers where necessary.

- 6.2.4 The representative from the Chamber of Commerce is also part of the organisation Braintree Against Retail Crime (BARC) and stated that there is an issue with loitering and dispersal of crowds late in the evenings when most pubs close. It is viewed as a direct implication of the restrictions in place on the high street, which is for buses only. The representatives would like to see an additional taxi rank on Wheatsheaf Road, Braintree to alleviate this and promote a safe night time economy.
- 6.2.5 There are no apparent quality issues with hackney carriages however private hire vehicles tend to be less clean. Driver cleanliness and appearance can sometimes be a problem and there is an issue with drivers that smoke.
- 6.2.6 The representatives commented that there can be an issue with disability discrimination and would like to see disability awareness training implemented. Training in this area could also be linked in with some lessons in basic customer service for the benefit of non disabled customers.
- 6.2.7 It was felt that there are some issues with current ranks; Manor Street was given as an example of over ranking, it blocks access to the town hall car park and restricts access for buses. It was suggested that the rank could be moved back and extended in order to solve this problem. Ideally the rank needs to be closer to the town centre.
- 6.2.8 There have been some complaints about drivers socialising in groups whilst waiting for fares. They leave doors open which can block the pavement and leave their engines running, which can be a social nuisance and have a detrimental impact on the towns' environment. Some drivers are also reluctant to move their vehicles without a fare causing congestion issues.
- 6.2.9 Recent price rises have been noticed especially by regular users. This may be putting off disabled users who can use free accessible public transport. The representatives also highlighted an issue with fares from the town centre, the one way system can result in an increase of £2-3 per journey.
- 6.2.10 The representatives commented on the poor image of the private hire trade. It was felt that hackney carriages tend to have a better image as they are generally in good condition and are portrayed in the media as safer for women, especially at night. Overall the attitudes of hackney carriage drivers are considered to be better than those of private hire drivers although both trades would benefit from better local knowledge.
- 6.2.11 One area the representatives commented there might be need for additional taxi provision was the Freeport area and the associated retail park.

Disability Representatives

- 6.2.12 No disability representatives were able to attend the focus group meeting, however discussion beforehand with the Braintree Licensing Officer established complaints made by disability groups in the last 2/3 years have revolved around the loading only issue on High street, Braintree which results in restricted access for taxis.

Essex Quality Taxi Partnership

- 6.2.13 The representative felt that there is an over supply of hackney carriages during the day time hours with large numbers waiting for fares, however the representative did not understand why a limit is in place. On the other hand the representative highlighted that the restrictions can be used to encourage high quality accessible vehicles.
- 6.2.14 The representative commented that there is an inherent need to increase publicity for taxis and improve their public image. It was stated that according to the trade there is little or no demand for WAVs and they would like to see 'mixed fleets'. However, by improving the vehicle quality and introducing more WAVs more disabled people may be encouraged to use them. The representative commented that making all hackney carriages wheelchair accessible may result in some hackney carriage drivers switching to private hire.
- 6.2.15 The representative felt that there is a need for training in disability awareness and customer care and it should be enforced alongside legislation to impose accessibility standards on the industry. Additionally, drivers must know how to use equipment in their vehicles otherwise it will be rendered useless in practice.
- 6.2.16 An NVQ is currently offered for free by the council. The representative felt that there should also be grants available for training in other areas, for example DVLA advanced driver training and area knowledge.
- 6.2.17 With regard to publicity, the taxi partnership is seeking to introduce a mandatory passenger's charter across Essex to promote high levels of service and increase the image of the trade. This will be visible to the customer during the journey and will outline what the customer can expect from the driver and also what the driver can expect from the customer. The partnership is also seeking local promotion of taxis, including signs at stations and taxi ranks, advertising in local papers and increasing accessibility of ranks.
- 6.2.18 The representative felt that better regulation of taxi services is more likely to filter out bad drivers than a capped limit and it could be influenced through training initiatives. Funding is currently available to all drivers, booking staff and operators. This funding has been

made available through the 'Train to Gain' scheme from the Learning and Skills Council for the NVQ Road Passenger Transport Qualification. It is the opinion of the representative that the aim is to train taxi drivers in a bid to improve standards of service and industry image but on a county level overall take-up has been surprisingly lacklustre.

6.3 *Indirect Consultation*

6.3.1 In addition to the face to face consultation undertaken a number of stakeholders were contacted by letter. This in turn assured the DfT guidelines were fulfilled and all relevant organisations and bodies were provided with an opportunity to comment. Copies of all the replies are included in Appendix 4.

6.3.2 In accordance with advice issued by the DfT the following organisations were contacted:

- Braintree District Council ;
- user/disability groups representing those passengers with special needs;
- local interest groups including hospitals, visitor attractions, entertainment outlets and education establishments; and
- rail, bus and coach operators.

6.4 *Comments Received*

6.4.1 The comments received are summarised below and appended in full to this report:

Adequacy of Hackney Carriage and Private Hire vehicles

6.4.2 There was a mixed response with regard to the adequacy of hackney carriage supply in Braintree District. Some respondents felt that there were too many hackney carriages in the district, whilst others commented that there were not enough on Friday and Saturday nights. One respondent stated that the adequacy of hackney carriages across all times of the day and all areas of the area is '*very good*'. It was also stated that in rural areas availability of taxis is very poor.

6.4.3 With regard to private hire services, one respondent commented that there are too many private hire vehicles in Braintree District, another felt that there is limited availability in the evenings and at night and another stated that there is a very good supply of private hire vehicles across all times of the day and all areas.

Image of the trade

6.4.4 It was stated that the standard of both vehicles and drivers varies considerably, whilst other respondents commented that vehicle and driver quality in Braintree District were 'OK'. Another respondent stated that the quality of some private hire vehicles is not very good. Comment was also made that the vast majority of the hackney carriage vehicles are good but they would benefit from being the same colour and make so that they are easily identifiable.

6.4.5 One respondent from a Private Hire company felt that a knowledge test and driving test should be made compulsory for all new drivers. Another commented that training in politeness and customer service should also be given.

Adequacy of rank locations

6.4.6 The respondents felt that there is no need for additional ranks in Braintree District although one suggested that the rank in the High Street, Braintree could be moved to a better location.

6.4.7 With regard to the accessibility of ranks one respondent commented that no improvements could be made to ranks to make them more user-friendly whilst another suggested that ranks could be extended to make it easier for Hackney Carriages to pick up fares.

Vehicle Accessibility

6.4.8 The respondents did not feel that there is any need for additional wheelchair accessible vehicles although one respondent commented that they had not observed any wheelchair accessible vehicles waiting at ranks for long periods of time.

6.4.9 It was widely felt that the ease with which to pre book a wheelchair accessible vehicle in Braintree District is good and that no improvements need to be made to make taxis more accessible to people with other disabilities.

Fares

6.4.10 There was a mixed response to the level and structure of fares. One respondent felt that they were medium, whilst others commented that they can be a bit high for pensioners and are expensive at night.

Publicity

6.4.11 The respondents had mixed opinions about the level of advertising of both hackney carriages and private hire services in Braintree District.

Safety

6.4.12 Some respondents commented that they feel safe using hackney carriages and private hire services in Braintree District whilst another commented that they feel safe the majority of the time. There was a mixed response with regard to safety at ranks, one respondent always felt safe, another felt safe most of the time but one respondent stated that they did not feel safe waiting at ranks at night.

6.4.13 With regard to implementing marshals at ranks one respondent felt that it would be a good idea, another commented that it is not busy enough to warrant them in Braintree District and another commented that marshals are essential on Friday and Saturday nights.

Transport Integration

6.4.14 It was generally felt that taxis complement other types of transport in Braintree District, one respondent commented that taxis provide a better service than trains and buses in the district.

7 Trade Survey

7.1 *Introduction*

7.1.1 A trade survey was designed with the aim of collecting information and views from both trades. In particular the survey allowed an assessment of operational issues and views of the hackney carriage market to supplement the rank observations, as well as covering enforcement and disability issues. The following Section summarises the results of the trade survey and full results are presented in Appendix 5.

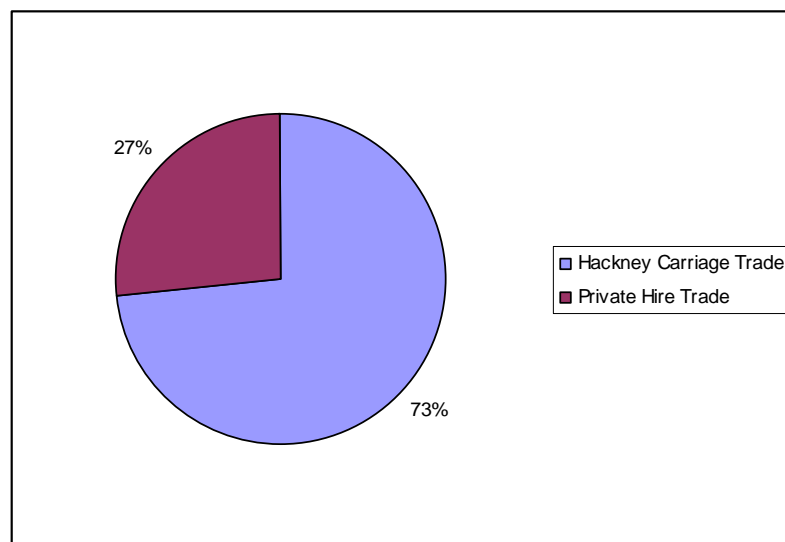
7.2 *Survey Administration*

7.2.1 The survey was conducted through a self completion questionnaire. These were sent to 600 licensed public and private hire drivers in Braintree District. A total of 75 questionnaire forms were completed and returned, giving a response rate of 12.5% - a typical value for this type of survey. It should be noted that not all totals sum to the total number of respondents per trade group as some respondents failed to answer all questions.

7.3 *General Operational Issues*

7.3.1 The responses provided have been disaggregated on a hackney carriage and private hire trade as shown in Figure 7.1 below.

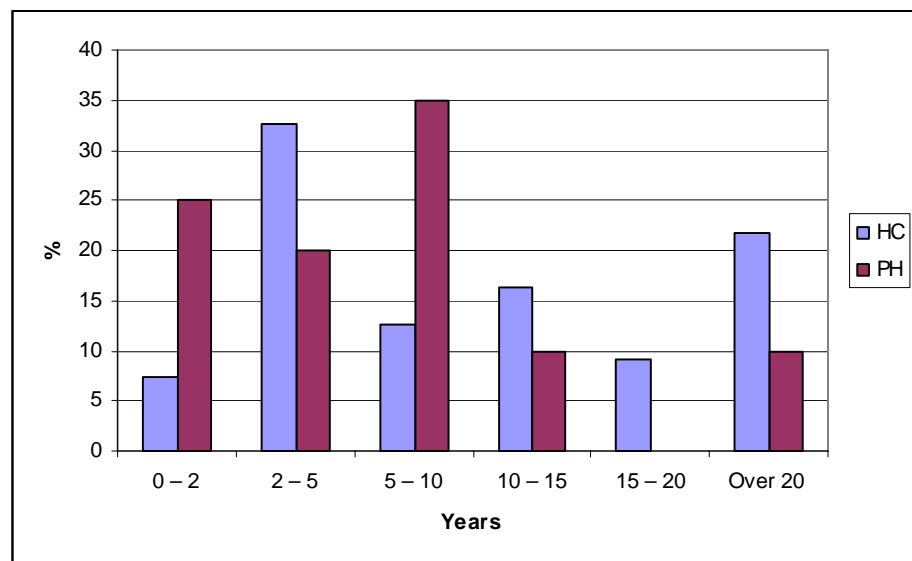
Figure 7.1: Breakdown of Responses between Trades



7.3.2

Figure 7.2 indicates that 32.7% of hackney carriage respondents have been involved in the taxi trade in Braintree District for between 2 and 5 years as have 20% of the private hire trade.

Figure 7.2: Duration of the respondents involvement in the hackney carriage trade/private hire trade.



7.4

Driving

7.4.1

Respondents were asked what type of vehicle they drive most frequently. The majority of hackney carriage drivers (70.6%) and private hire drivers (52.6%) drive a saloon car.

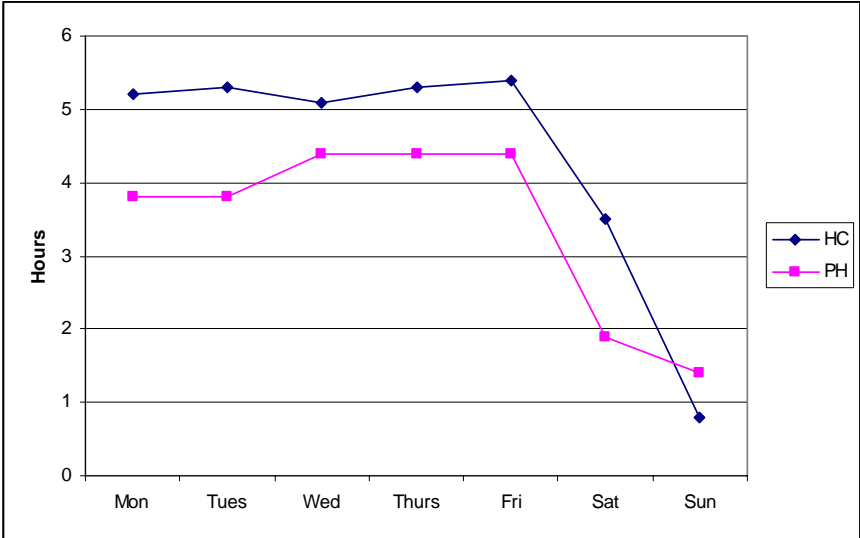
7.4.2

Respondents were asked on average the number of hours they worked in a typical week. The hackney carriage trade cited an average of 46.4 hours per week compared with an average of 37.8 hours per week for the private hire trade.

7.4.3

Respondents were asked to state how many hours they worked at different times of day during a typical week. Figure 7.3 documents the average hours worked during the daytime period (06:00-18:00) for each day of the week. On average, the hackney carriage trade work longer hours during the day compared to private hire. It also shows that both trades work the most hours during the day on Fridays and tend to work less hours during the day on the weekends than during the weekdays.

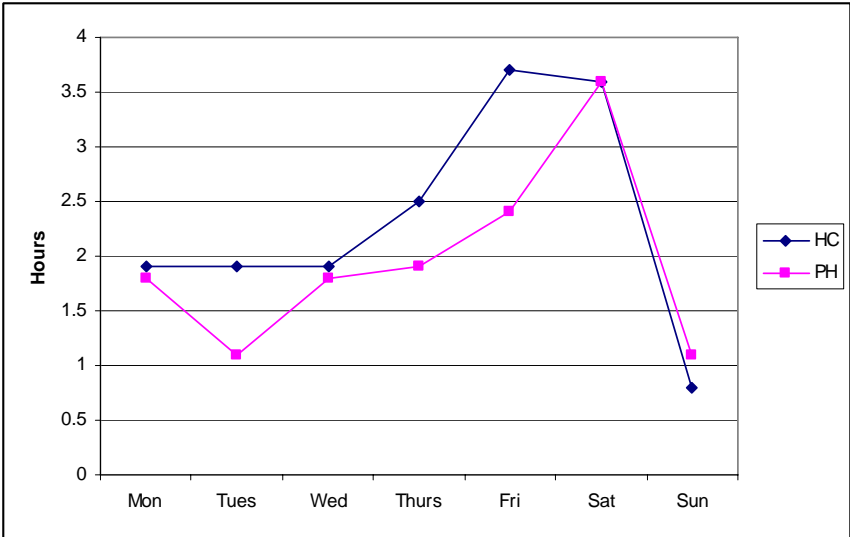
Figure 7.3: Average daytime hours worked



7.4.4

Figure 7.4 shows the average number of hours worked during the evening/night period (18:00-06:00). Both trades work longer hours on a Friday and Saturday night compared with other nights during the week.

Figure 7.4: Average night time hours worked



7.4.5 The trade were asked whether the Licensing Act 2003 had an effect on their typical working week. Some 66.7% of hackney carriage respondents stated that it had not had an effect on them compared with 84.2% of private hire respondents.

7.4.6 Those who replied that it had had an effect on their typical working week were then asked in what way it had affected them. The results are shown below in Table 7.1.

Table 7.1: Effects of the 2003 Licensing Act (Multiple responses)

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Work later in the evening	14	82.4	2	66.7
Work for longer hours	11	64.7	2	66.7
Other	1	5.9	1	33.3

7.4.7 Some 82.4% of hackney carriage respondents stated that they work late in the evening as do 66.7% of private hire drivers.

7.4.8 Respondents were asked to state the number of times they carry disabled passengers on a weekly basis. Table 7.2 provides the results. Some 42% of hackney respondents stated that they carry disabled passengers 1 to 5 times a week and 47.4% of private hire respondents never carry disabled passengers.

Table 7.2: Frequency of Transport of Disabled Persons

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Never	19	38.0	9	47.4
1to 5	21	42.0	4	21.1
5 to 10	6	12.0	4	21.1
10 to 20	2	4.0	1	5.3
More than 20	2	4.0	1	5.3
Total	50	100.0	19	100.0

7.5 *Safety & Security*

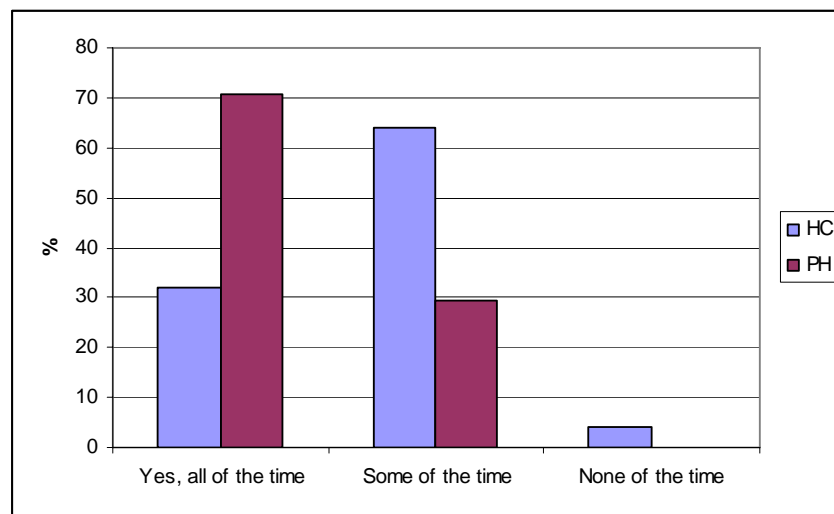
7.5.1 The questionnaire asked if drivers had been attacked by a passenger within the last year. Some 2% of hackney carriage drivers and no private hire drivers stated that they

had been physically attacked in the last year. Whilst 44% of hackney carriage respondents and 21.1% of private hire respondents had been verbally attacked.

7.5.2

Respondents were then asked if they felt safe whilst working as a taxi driver in Braintree District, the results of which are shown below in Figure 7.5. The majority of hackney carriage respondents stated that they felt safe some of the time (64%), whilst the majority of the private hire respondents felt safe all of the time (70.6%).

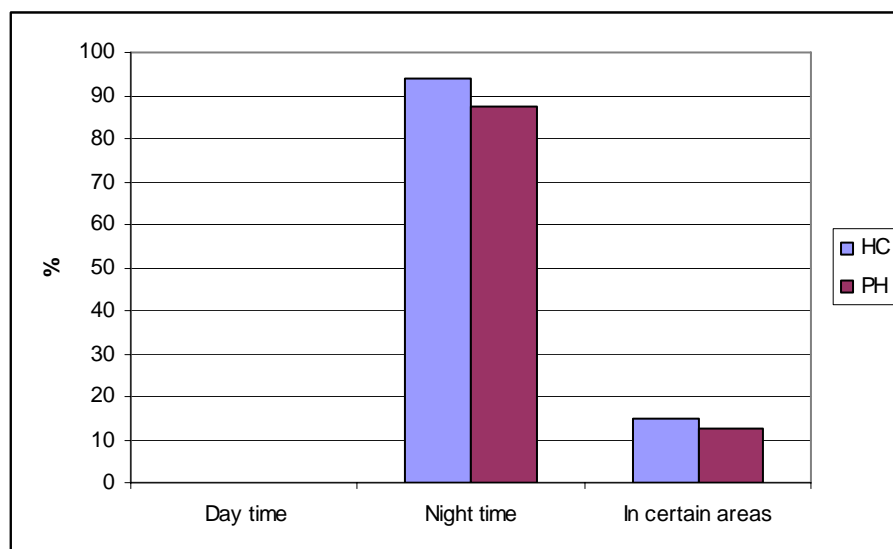
Figure 7.5: Do you feel safe whilst working as a Taxi Driver in Braintree District?



7.5.3

Of those stating that they felt unsafe, 94.1% of hackney carriage and 87.5% of private hire respondents stated that they felt unsafe whilst working at night in Braintree District.

Figure 7.6: When do you feel unsafe as a taxi driver in Braintree District?



7.5.4 Some 14.7% of the hackney carriage trade stated that they feel unsafe in certain areas of Braintree District, as did 12.5% of the private hire trade. The area most commonly reported as being unsafe was Chicago's Rock Café in Braintree.

7.6 *Ranks*

7.6.1 Members of both trades were asked whether they believe there is sufficient rank space in the district. Some 71.7% of hackney carriage respondents stated that there was not sufficient rank space, whilst the majority of private hire respondents said that there was enough rank space (63.6%).

7.6.2 Respondents were then asked if there were any areas in Braintree District where new ranks should be introduced. The majority of both the hackney carriage trade (67.4%) and private hire trade (81.8%) did not state any additional areas where ranks are needed.

7.6.3 Respondents were then asked in what locations the new ranks were required. The most popular locations suggested were;

- Manor Street, Braintree;
- Bank Street, Braintree;
- High Street, Braintree;
- Rayne Road, Braintree; and

- Albert Road, Witham

7.7 *Vehicle Conditions*

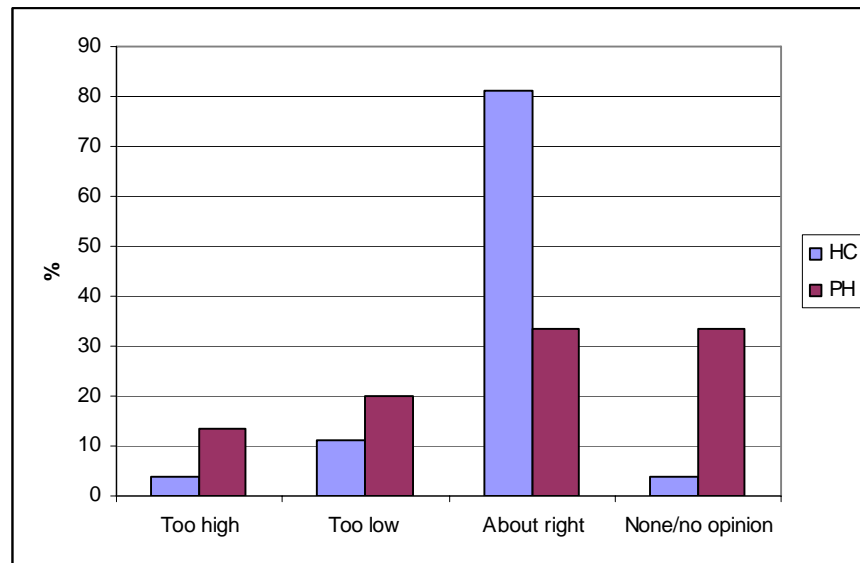
7.7.1 Braintree District Council requires all hackney carriages, first issued with a plate after the 14th February 2002, to be wheelchair accessible. The majority of both hackney carriage respondents (58.5%) and private hire respondents (75%) felt that the conditions were satisfactory.

7.8 *Fares*

7.8.1 Members of both trades were asked for their opinions regarding the current level of hackney carriage fares, the results are documented in Figure 7.7.

7.8.2 Some 43% of hackney carriage respondents considered hackney carriage fares to be 'about right'.

Figure 7.7: View of Hackney Carriage Fares



7.9 *Training*

7.9.1 Both trades were asked if they felt that taxi drivers receive enough training before being granted a licence. The majority of the hackney carriage trade (66.7%) and private hire trade (50%) were of the opinion that training was insufficient.

7.9.2 Those respondents who stated that they didn't think they received sufficient training were then asked what training they would like to see offered to drivers. The results are shown in Table 7.3 below.

Table 7.3 What additional training is necessary? (Multiple Responses)

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
English Language	27	69.2	5	45.5
Customer Care	26	66.7	8	72.7
Disability Awareness	22	56.4	7	63.6
Driving Ability Test	22	56.4	7	63.6
Knowledge Test	29	74.4	5	45.5
Other	4	10.3	1	9.1

7.9.3 The hackney carriage trade felt that English language (69.2%), customer care training (66.7%) and a knowledge test (74.4%) were the most important training they would like to see offered to drivers. The private hire drivers were of a similar opinion with 63.6% perceiving disability awareness and driving ability tests to be important and 72.7% perceiving customer care training to be important.

7.9.4 Respondents were then asked whether this training should be compulsory or voluntary. Of those who answered this question, 100% of the hackney carriage trade and 88.9% of the private hire trade said that the training should be compulsory. The results are shown in Table 7.4.

Table 7.4: Should this training be compulsory or voluntary?

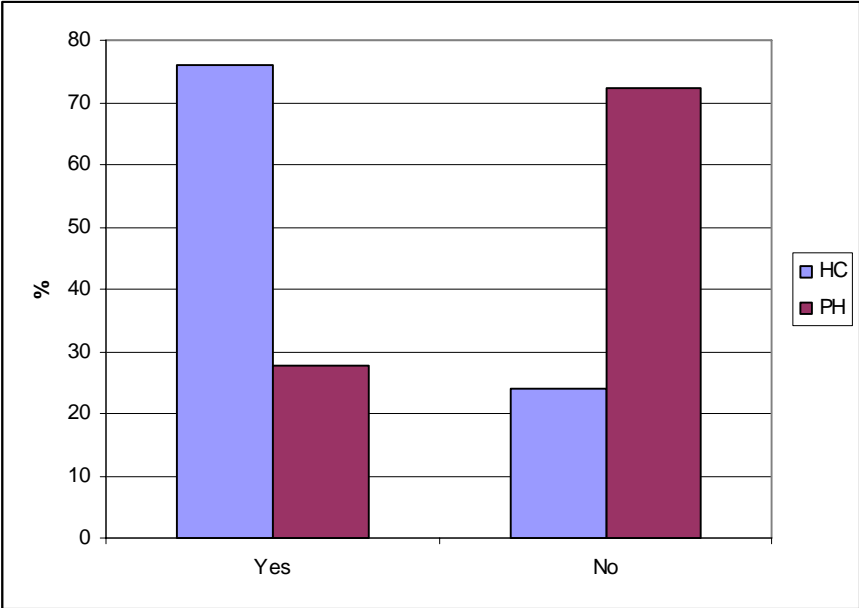
	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Compulsory	36	100.0	8	88.9
Voluntary	0	0.0	1	11.1
Total	36	100.0	9	100.0

7.10 *Taxi Market in Braintree District*

7.10.1

Members of both trades were asked if they were aware that Braintree District Council enforces a numerical limit of 84 on the number of hackney carriage vehicle licences in the city. The results are outlined in Figure 7.8.

Figure 7.8: Were you aware that there is a numerical limit on the number of hackney carriage vehicle licences in Braintree District?



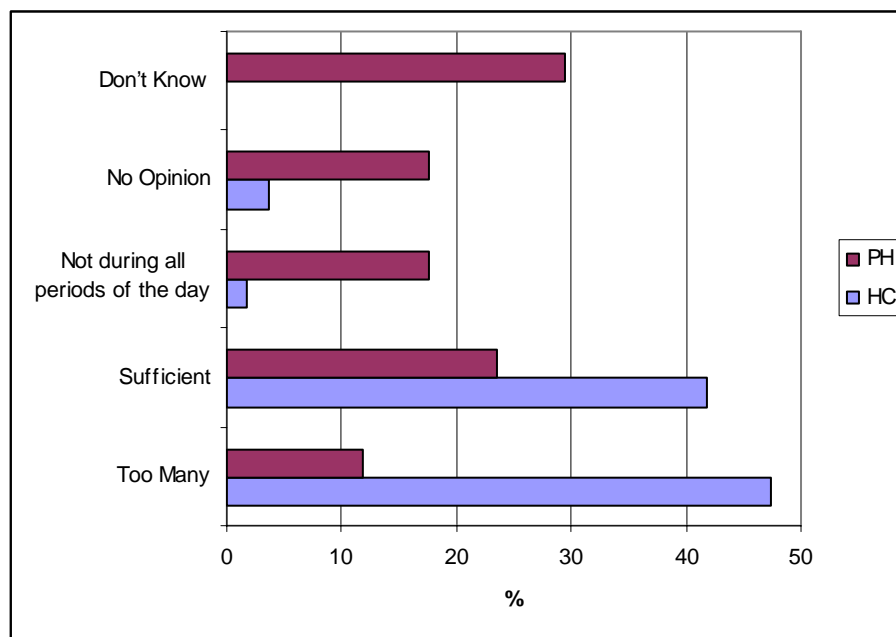
7.10.2

The majority of the hackney carriage respondents were aware about the numerical limit (75.9%), although only 27.8% of private hire respondents were aware of the restrictions.

7.10.3

Members of both trades were asked whether they consider there to be sufficient hackney carriages to meet the current level of demand in Braintree District. Figure 7.9 indicates that 47.3% of the hackney carriage trade consider there to be too many hackney carriages, compared to 11.8% of private hire drivers. Some 29.4% of private hire respondents stated that they did not know.

Figure 7.9: Do you consider there to be sufficient hackney carriages to meet the current level of demand in Braintree District?



7.10.4

Those respondents stating that there were insufficient hackney carriages operating in the district were asked what times of day additional carriages are required. The results are summarised in Table 7.5.

Table 7.5: If insufficient, when are more hackneys carriages required?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
During the daytime	1	100.0	1	33.3
During the evening/night	0	0.0	1	33.3
All day and night	0	0.0	1	33.3

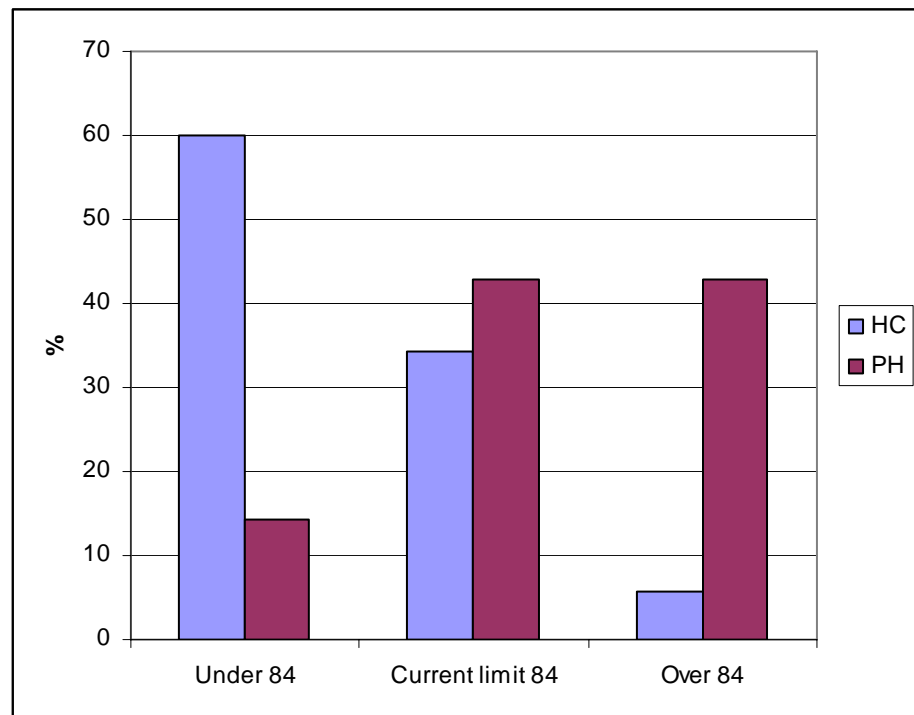
7.10.5

All respondents were asked to state the ideal fleet size for hackney carriages in Braintree District. The results are detailed in Figure 7.10.

7.10.6

Of those drivers who responded, 60% of the hackney carriage trade felt that the fleet size should be smaller than the current number, whilst 42.9% of the private hire trade felt that it should stay the same or be larger.

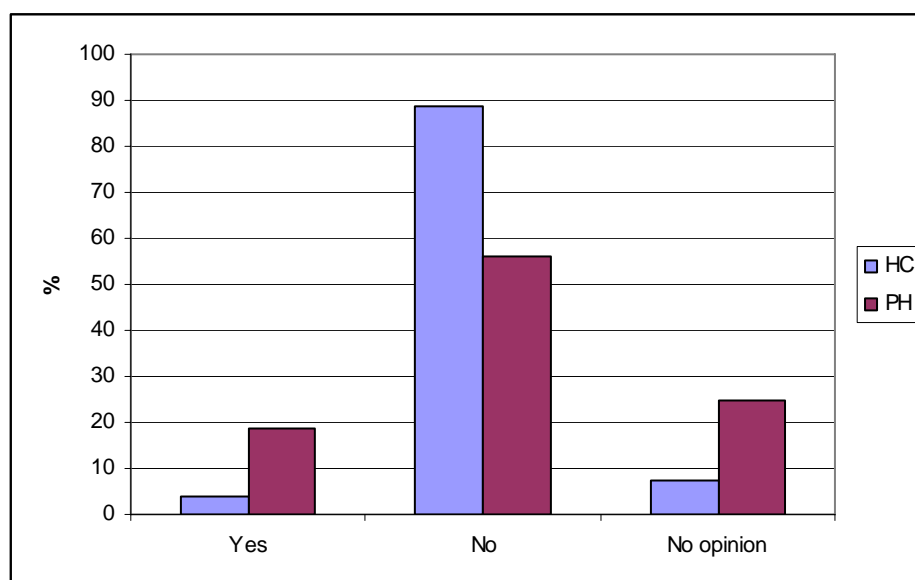
Figure 7.10: Opinion of the Ideal Hackney Carriage Fleet Size.



7.10.7

All respondents were asked to state if they thought that Braintree District Council should remove the numerical limit on the number of hackney carriage vehicle licences. The responses are detailed in Figure 7.11.

Figure 7.11: Should Braintree District Council remove the numerical limit?



7.10.8 The majority of respondents from the hackney carriage trade (88.7%) felt that the numerical limit should not be removed compared with 56.3% of the private hire respondents. Some 18.8% of the private hire respondents thought the limit should be removed.

7.10.9 Views were sought regarding the likely impact on a series of factors if Braintree District Council were to remove the existing limit on hackney carriage licences. The findings are summarised below and presented in Table 7.6.

Congestion

7.10.10 The majority of respondents from the hackney carriage trade (80.4%) felt congestion would increase, compared to 46.2% from the private hire trade felt this would be the case.

Fares

7.10.11 The majority of the private hire trade respondents (61.5%) commented that fares would decrease following de-restriction, compared to just 35.3% of the hackney carriage trade.

Passenger Waiting Times

- 7.10.12 The majority of hackney carriage respondents believe that passenger waiting times at ranks, when flagged or when booked by telephone would not be affected. The majority of private hire drivers considered that waiting times at ranks or when flagging a taxi would decrease if the existing limit on the number of licences was removed.

Vehicle Quality

- 7.10.13 Over half of respondents from the hackney carriage trade felt hackney vehicle and private hire vehicle quality would decrease, whilst 31.9% of private hire trade respondents felt that there would be no change.

Effectiveness of Enforcement

- 7.10.14 With regard to effectiveness of enforcement, 75% of the hackney carriage trade were of the opinion that removing existing licence restrictions would result in a decrease. Half of the private hire trade were of the same opinion.

Illegal Plying for Hire

- 7.10.15 In terms of illegal plying for hire by private hire vehicles, 46.7% of the private hire trade were of the opinion that a change in licence restriction conditions would have an increase, compared with 64% of hackney carriage drivers.

Over Ranking

- 7.10.16 Both the hackney carriage and private hire trade felt over ranking would increase, with a response of 84.6% and 66.7% respectively.

Customer Satisfaction

- 7.10.17 With regard to customer satisfaction, 50% of hackney carriage drivers felt that it would decrease as a result of licence de regulation. Whereas 46.7% of the private hire trade felt that it would increase.

Table 7.6: What would happen should Braintree Council remove the numerical limit?

	Hackney Carriage Trade			Private Hire Trade		
	Increase	No Effect	Decrease	Increase	No Effect	Decrease
Traffic Congestion	80.4	19.6	0.0	46.1	53.8	0.0
Fares	23.5	41.2	35.3	0.0	38.5	61.5
Passenger waiting times at ranks	11.8	68.6	19.6	7.1	21.4	71.4
Passenger waiting time when flagdown	8.0	82.0	10.0	0.0	41.7	58.3
Passenger waiting time by telephone	8.0	82.0	10.0	14.2	42.9	42.9
Hackney carriage vehicle quality	5.9	21.6	72.5	14.3	35.7	50.0
Private hire vehicle quality	6.1	32.7	61.2	25.0	50.0	25.0
Effectiveness of enforcement	5.8	19.2	75.0	14.3	35.7	50.0
Illegal plying for hire – private hire	64.0	22.0	14.0	46.7	33.3	20.0
Illegal plying for hire – unlicensed	52.9	37.3	9.8	53.4	13.3	33.3
Over ranking	84.6	11.5	3.9	66.7	26.7	6.6
Customer satisfaction	5.8	44.2	50.0	46.7	20.0	33.3

7.10.18

Respondents were then asked their opinion on a series of statements. The first statement was *'There is not enough work to support the current number of hackney carriages'*. The results are shown in Table 7.7.

Table 7.7 'There is not enough work to support the current number of hackney carriages'

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Strongly disagree	3	5.7	3	18.8
Disagree	1	1.9	2	12.5
Neither agree nor disagree	4	9.4	5	31.3
Agree	10	18.9	2	12.5
Strongly agree	34	64.2	4	25.0
Total	53	100.0	16	100.0

7.10.19 Over half of hackney carriage respondents (64.2%) strongly agree with the statement that there is not enough work to support the current number of hackney carriages. Some 25% of private hire strongly agree that there is not enough work.

7.10.20 The following comments were recorded:

- 'Not enough work'
- 'Long waiting times between fares'
- 'Too many cabs, overcrowded ranks'

7.10.21 The second statement was 'Removing the limit on the number of hackney carriages in Braintree would benefit the public by reducing the waiting time at ranks'. The results are outlined in Table 7.8.

Table 7.8: 'Removing the limit on the number of hackney carriages in Braintree District would benefit the public by reducing the waiting time at ranks'

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Strongly disagree	28	54.9	2	12.5
Disagree	12	23.5	0	0.0
Neither agree nor disagree	4	7.8	5	31.3
Agree	5	9.8	7	43.8
Strongly agree	2	3.9	2	12.5
Total	51	100.0	16	100.0

7.10.22 Some 54.9% of hackney carriage drivers strongly disagreed that removing the limit on the number of hackney carriages in Braintree District would benefit the public by reducing waiting times at ranks, compared to 12.5% of Private Hire respondents.

7.10.23 The following comments were recorded:

- 'No waiting time at present'
- '*There are enough hackney carriages already*'

7.10.24 The third statement was '*There are special circumstances in Braintree District that make the retention of the numerical limit essential*'. The results are shown in Table 7.9 below.

Table 7.9: 'There are special circumstances in Braintree District that make the retention of the numerical limit essential'

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Strongly disagree	2	4.2	3	20.0
Disagree	1	2.1	2	13.3
Neither agree nor disagree	5	10.4	7	46.7
Agree	12	25.0	2	13.3
Strongly agree	28	58.3	1	6.7
Total	48	100.0	15	100.0

- 7.10.25 Some 83.3% of hackney carriage trade agree or strongly agree that there are special circumstances in Braintree District that make the retention of the numerical limit essential, compared to 20% of the private hire trade.
- 7.10.26 The most common response to the statement was '*Not enough work to support more drivers*'
- 7.10.27 All respondents were asked what the effect on themselves would be if the numerical limit was removed. The results are outlined below in Table 7.10.
- 7.10.28 Some 74.1% of hackney carriage responses cited they would work more hours if the numerical limit of hackney carriages was removed. Some 42.6% of hackney responses stated that they would leave the trade if Braintree District Council derestricted. In contrast 35.3% of private hire drivers said they would switch from private hire to a hackney carriage driver.
- 7.10.29 Of those respondents who stated another effect de restriction would have, the main concern for hackney carriage drivers was financial.

Table 7.10: Effects of removing limit (Multiple Responses)

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
I would continue as normal	2	3.7	5	29.4
I would expect to work more hours	40	74.1	3	17.6
I would expect to work fewer hours	2	3.7	2	11.8
I would acquire a hackney carriage licence	5	9.3	6	35.3
I would acquire multiple hackney carriage licences	4	7.4	0	0.0
I would switch from hackney to private hire	2	3.7	0	0.0
I would switch from private hire to hackney	3	5.6	6	35.3
I would leave the trade	23	42.6	4	23.5
Other	3	5.6	1	5.9

7.10.30

Key results from the Trade Survey can be summarised as;

Summary

- The majority of the hackney carriage trade and private hire trade thought training was insufficient and Knowledge test, English language and Customer care training in particular was required;
- Majority of hackney carriage drivers sometimes feel unsafe whilst working in Braintree District;
- 71.7% of hackney carriage respondents stated that there was insufficient rank space in Braintree District; and
- 42.6% of hackney respondents stated that they would leave the trade should the authority de restrict.

8 Deriving the Significant Unmet Demand Index Value

8.1.1 The data collated can be summarised using Halcrow's ISUD factor described in Section 3. The component parts of the index, their source and their values are given below:

• Average Passenger Delay (Table 4.2)	0.14 minutes <i>(8.4 seconds)</i>
• Peak Factor (Figure 4.1)	1
• General Incidence of Delay (paragraph 4.5.1)	1.51
• Steady State Performance (Table 4.1)	0
• Seasonality Factor (paragraph 3.4.5)	1.2
• Latent Demand Factor (paragraph 5.3.2)	1.03
ISUD $(0.14*1*1.51*0*1.2*1.03)$	0

8.1.2 The cut off level for a significant unmet demand is 80. It is clear that Braintree District is well below this cut off point, indicating that there is NO significant unmet demand. This conclusion covers both patent and latent/suppressed demand.

8.2 *Braintree District Compared to Other Districts*

8.2.1 Comparable statistics are available from 17 local authorities and these are listed in Table 8.3. The table highlights a number of key results including:

- population per hackney carriage at the time of the study (column one);
- the proportion of rank users travelling in hours in which delays of greater than zero, greater than one minute and greater than five minutes occurred (columns two to four);
- average passenger and cab delay calculated from the rank observations (columns five to six);
- the proportion of Monday to Thursday daytime hours in which excess demand was observed (column seven);
- the judgement on whether rank demand is highly peaked (column eleven); and
- a numerical indicator of significant unmet demand.

8.3

Results of the Comparison with Previous Studies

8.3.1

The following points (obtained from the rank observations) may be made about the results in Braintree District compared to other areas studied:

- population per hackney carriage is higher than the average overall value i.e. Braintree has a lower than average provision;
- the proportion of passengers, who travel in hours where some delay occurs, is 1.51%, which is lower than the average (21%) for the districts analysed. The proportion of passengers travelling in hours where the delay equals or exceeds one minute (1.51%) is also below the average of 10% for all the authorities;
- overall average passenger delay at 0.14 minutes (8.4 seconds) is lower than the average value;
- overall average cab delay is higher than the average for all the districts shown;
- the proportion of weekday daytime hours in which excess demand conditions are observed is 0% which is below the average for all authorities shown; and
- demand in Braintree District is not considered to exhibit a high degree of peaking late at night compared to the rest of the day.

9 Summary and Conclusions

9.1 *Introduction*

9.1.1 Halcrow has conducted a study of the hackney carriage market on behalf of Braintree District Council.

9.1.2 The present study has been conducted in pursuit of the following objectives:

- to identify whether or not there exists a significant unmet demand for hackney carriage services in Braintree District; and
- to recommend the increase in licences required to eliminate any significant unmet demand.

9.1.3 This section provides a brief description of the work undertaken and summarises the conclusions and implications for regulatory policy.

9.2 *Significant Unmet Demand*

9.2.1 The 2009 study has identified that there is NO evidence of significant unmet demand for hackney carriages in Braintree District. This conclusion is based on an assessment of the implications of case law that has emerged since 2000, and the results of Halcrow's analysis.

9.3 *Summary of Consultation – Interested Parties*

9.3.1 The Department for Transport had requested that licensing authorities consult widely to inform their policy making in respect of continued entry control to the hackney carriage market. In addition to the consultation that has routinely been included in previous market studies (correspondence with interested parties), Halcrow has followed the prescribed approach and sought the views of all those involved in the taxi trade.

9.3.2 Stakeholders were generally happy with the numbers of hackney carriages but reference was made to the need to improve both driver and vehicle quality.

9.4 *Summary of Consultation – General Public*

9.4.1 Some 520 interviews were carried in February and March 2008. The key results are as follows:

- Some 59% of hirings are done by telephone;
- High levels of satisfaction with the time taken for the taxi to arrive on last trip;

- Only 2.7% of respondents had given up trying to obtain a vehicle by rank or flagdown;
- 29.9% of respondents felt that taxi services in Braintree could be improved (be cheaper); and
- The majority of respondents (over 96%) felt safe using taxis during the day and night.

9.5

Summary of Consultation – Trade

9.5.1

Some 75 members of the trade responded to a trade survey. The key results are as follows:

- A small minority of drivers feel unsafe whilst working in some areas of Braintree District at night;
- The majority of the hackney carriage trade and private hire trade thought training was not sufficient and felt that a knowledge test, English language and customer care training in particular were required;
- 71.7% of hackney carriage respondents stated that there was not sufficient rank space in Braintree; and
- 42.6% of hackney respondents stated that they would leave the trade should the authority de restrict.

9.6

Conclusions

9.6.1

The 2009 study has identified that there is NO evidence of significant unmet demand for hackney carriages in Braintree District. This conclusion is based on an assessment of the implications of case law that has emerged since 2000, and the results of Halcrow's analysis.

9.6.2

On this basis the authority has discretion in its hackney licensing policy and may either:

- continue to limit the number of vehicles at 84;
- issue any number of additional plates as it sees fit, either in one allocation or a series of allocations; or
- remove the limit on the number of vehicles and allow a free entry policy.