North Tyneside Council

Hackney Carriage Demand Survey

Final Report

September 2009

Halcrow Group Limited

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Final Report

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This report has been issued and amended as follows:

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1	0	Draft Report	02.09	SP
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EXECUTIVE SUMMARY

Introduction

This study has been conducted by Halcrow on behalf of North Tyneside Council in pursuit of the following objectives:

- to identify whether or not there exists a significant unmet demand for hackney carriage services in North Tyneside;
- to recommend the increase in licences required to eliminate any significant unmet demand; and
- to assist the council in determining if there is any evidence that removal or changes to the limit on hackney carriage licences would result in a deterioration in the amount or quality of hackney carriage provision.

Methodology

In order to be able to draw conclusions from the study the following methodology was undertaken:

- Rank Observations;
- Public Attitude Surveys;
- Flag Down Survey; and
- Consultation with Key Stakeholders.

Rank Observations

The rank observation programme covered a period of 185 hours. During the hours observed some 6,889 passengers and 4,376 cab departures were recorded. The rank observations were carried out from Thursday 11th September to Thursday 2nd October. The rank observations identified the following:

- the predominant market state of the hackney carriage service is one of equilibrium (i.e. demand generally balanced by supply)
- demand for hackney carriages is highly peaked
- average passenger wait for a cab is 0.39 minutes
- highest passenger delay is 1.08 minutes (Bedford St)
- average cab delay is 10.72 minutes
- there is NO evidence of significant unmet demand

Public Attitude Survey

Some 549 on-street public interview surveys were carried out in November 2008 to ascertain the publics' view of the taxi and private hire service. The key results are:

- Over 70%of hirings are by telephone;
- High levels of satisfaction with delay on last trip
- Some 16.8% of respondents had given up trying to obtain a vehicle by rank or flagdown;

- Some 33.7% of respondents feel that taxi services in North Tyneside could be improved (need to be cheaper); and
- Majority of respondents felt safe using taxis during the day and night.

Flag Down Survey

A series of surveys were undertaken to qualify the length of time it takes to flag down a taxi in North Tyneside. The Public attitude survey found just 4% of respondents obtained a taxi by on street flagdown for their last journey. However, all respondents obtaining a taxi in this way were satisfied with the amount of time it took them.

The observer waited for between 30 and 45 minutes to flagdown a taxi. The observer was only successful in acquiring a Hackney Carriage on one out of the four journeys attempted, North Shields to Wallsend.

Consultation

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.

Stakeholders were generally happy with the numbers of hackney carriages but highlighted more wheelchair accessible vehicles should be available.

Conclusion

The study has identified that there is NO evidence of significant unmet demand for hackney carriages in North Tyneside. 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. On this basis the authority has discretion in its hackney licensing policy and may either:

- continue to limit the number of vehicles at 204;
- 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.

1 Study Objectives and Overview

1.1 General

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

- to identify whether or not there exists a significant unmet demand for hackney carriage services in North Tyneside;
- to recommend the increase in licences required to eliminate any significant unmet demand; and
- to assist the council in determining if there is any evidence that removal or changes to the limit on hackney carriage licences would result in a deterioration in the amount or quality of hackney carriage provision.

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 North Tyneside 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 North Tyneside Overview

2.3.1 North Tyneside is located on the north east coast of England with a population of 198,000. The borough is made up of a number of settlements including North Shields, Wallsend, Tynemouth and Whitley Bay.

2.4 Background to the Hackney Carriage Market in North Tyneside

2.4.1 North Tyneside limits the number of Hackney carriages, and the level has been set at 204 since 2004. This gives a level of hackney carriage provision of one vehicle per 971 resident population. Hackney carriages in North Tyneside have a black livery. There are 100 wheelchair accessible vehicles and 104 saloon type vehicles.

2.4.2 The private hire fleet consists of 833 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 North Tyneside taxi market.

2.5 Provision of Hackney Carriage Stands

2.5.1 There are 23 taxi ranks in North Tyneside providing space for a total of 78 vehicles. A list of taxi ranks in North Tyneside can be found in Appendix 1. Plates 1 -5 picture five of the ranks.

Plate 1 Metro Station rank, North Shields.

Plate 2 Bedford Street Rank, North Shields

Plate 3 South Parade, Whitley Bay

Plate 4 Station Road Rank, Wallsend

Plate 5 Front Street Rank, Tynemouth

2.6 Hackney Carriage Fares and Licence Premiums

2.6.1 Hackney carriage fares are regulated by the Local Authority. There are two main tariffs. Tariff 1 consists of Monday to Saturday daytime (7am-10pm) and tariff two consists of evenings (10pm-7am), Sundays, bank holidays and 27th-31st December. There is a series of additional charges for, extra passengers, pets, luggage or fouling of the vehicle interior.

2.6.2 Tariff 1 is made up of two elements; an initial fee (or "drop") of £1.60 for entering the vehicle and travelling any distance up to 251.4 yards or 56 seconds of waiting time or a combination of both. For each additional 251.4 yards travelled or 56 seconds waiting time or a combination of both the fee is 20p. A two-mile fare for tariff 1 would therefore be £4.20. Tariff 2 has an initial fee of £2.40 for entering the vehicle and travelling any distance up to 220 yards or 56 seconds of waiting time or a combination of both. For each additional 220 yards travelled or 56 seconds waiting time or a combination of both the fee is 20p. A two-mile journey for tariff 2 would therefore be £5.40. A Tyne Commission Quay fare is also in operation which states that a minimum charge of £4.00 will be made for all journeys of up to 1979 yards and from there tariff 2 will apply. Table 2.1 outlines the fare structure in more detail.

Table 2.1: North Tyneside Hackney Carriage Fare Tariff 2009

	Price
Standard Charge Tariff 1 (Between 7am and 10pm Monday to Saturday)	
Initial fee for any distance travelled up to 251.4 yards or 56 seconds of waiting time	£1.60
For each subsequent 251.4 yards or 56 seconds waiting time	20p
Standard Charge Tariff 2 (Between 10pm and 7am Monday to Sunday, Sunday day, bank holidays, 27th-31st December)	
Initial fee for any distance travelled up to 220 yards or 56 seconds of waiting time or a combination of both	£2.40
For each subsequent 220 yards or 56 seconds waiting time or a combination of both	20p
Tyne Commission Quay	
Initial fee for any distance travelled up to 1979	£4.00
For any distance after this, tariff 2 will be applied	
Other Charges	Standard Charge
Extra Passengers (third and subsequent passengers or 2 children between 3 and 12 years of age)	40p
Cats and Dogs (excluding assistant, guide, or hearing dogs)	£2.00
Each piece of luggage (outside carriage)	40p
Fouling of vehicle interior (for alcohol induced fouling or, in all cases, when the night tariff applies	£80
For each Bicycle	£3.00
For each perambulator	50p

Source: North Tyneside Council

2.6.3 In the published monthly league table, North Tyneside is ranked 283 of the 376 authorities cited (Private Hire and Taxi Monthly, January 2009). Fares are lower than what is typical elsewhere across the UK but comparable with neighbouring authorities with the exception of Newcastle upon Tyne. Table 2.12 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 376 Authorities with 1 being the most expensive)

Local Authority	Rank
Newcastle Upon Tyne	61
Gateshead	241
Blyth Valley	276
North Tyneside	**283**
Sunderland	286
South Tyneside	337

Source: Private Hire and Taxi Monthly, January 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 that the resale value of a licence in North Tyneside is £10,000.

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 North Tyneside 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 low cab waiting time associated with under-supply, 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 Final Tyne and Wear Local Transport Plan 2006-2011 was produced in March 2006 by the five local authorities within the county (Gateshead, North Tyneside, South Tyneside, Sunderland and Newcastle upon Tyne) in conjunction with the public transport provider Nexus. Local Authorities are required to produce a Local Transport Plan, which are strategies for developing local integrated transport as part of a longer term vision for the city.

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 there is a target to develop a permit scheme for hackney carriages and private hire vehicles to ensure that all taxi vehicles are Euro3 compliant.

2.7.4 In addition the LTP states that there is an investigation underway into how hackney carriages and private hire vehicles could be integrated with the Ucall scheme (a bus that is booked like a taxi), care service and community support schemes.

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

ISUD = APD x PF x GID x SSP x SF x 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 an 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.

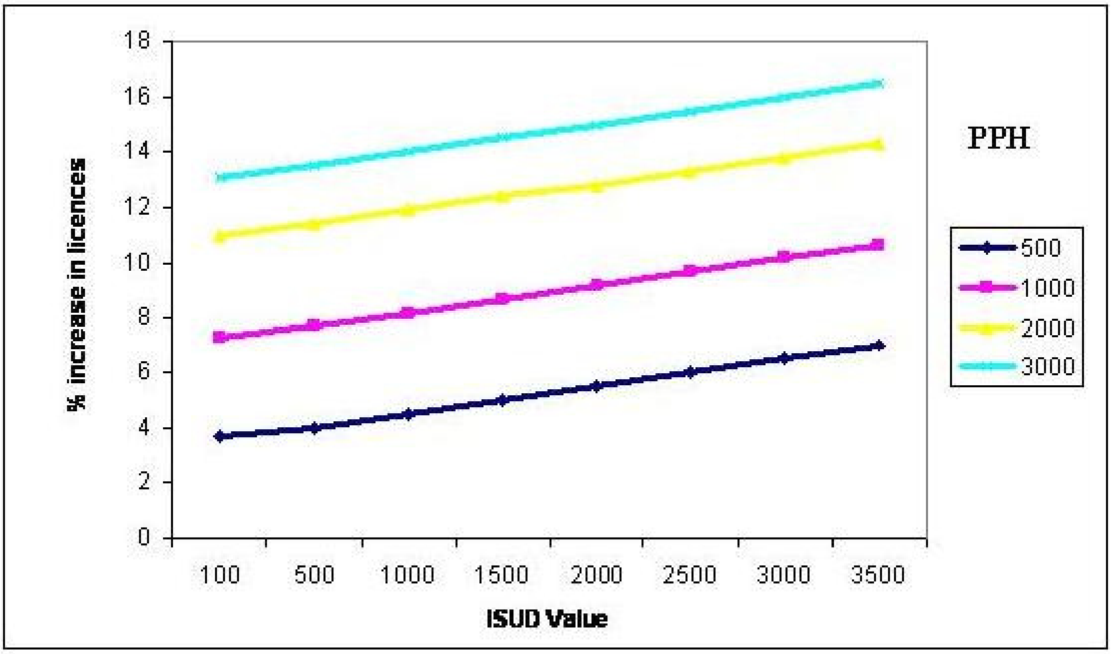
3.5.2 SUDSIM represents a synthesis of a queue simulation work that was previously used (1989 to 2002) to predict the alleviation of significant unmet demand and the ISUD factor described above (hence the term SUDSIM). The benefit of this approach is that it provides a direct relationship between the 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. The figure shows that the percentage increase in a hackney fleet required to eliminate significant unmet demand is positively related to the population per hackney (PPH) and the value of the ISUD factor over the expected range of these two variables.

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:

New Licences = SUDSIM x 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, exp 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 185 hours. During the hours observed some 6,889 passengers and 4,376 cab departures were recorded. The rank observations were carried out from Thursday 11th September to Thursday 2nd October. 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 9% of the hours observed while excess demand (queues of passengers) was experienced in 4% of hours. Conditions are most favourable to customers during the day on Saturday and Sunday. Conditions were least favourable to customers on weekday day periods and weekend nights.

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

Period		Excess Demand	Equilibrium	Excess Supply
Weekday	Day	8	92	0
	Night	2	75	23
Weekend	Day	0	100	0
	Night	9	77	14
Sunday	Day	0	100	0
All 2008		**4**	**87**	**9**

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 North Tyneside (Table 4.2).

4.3.2 The survey suggests some 6,889 passenger departures occur per week from ranks in North Tyneside involving some 4,376 cab departures.

4.3.3 The hackney carriage trade is somewhat concentrated at South Parade in Whitley Bay, and North Shields Metro Station accounting for 43% and 30% of the total. On average, passengers wait 0.39 minutes for a cab. Passengers experience the greatest delay at the Bedford Street rank in North Shields, where an average delay of 1.08 minutes is experienced.

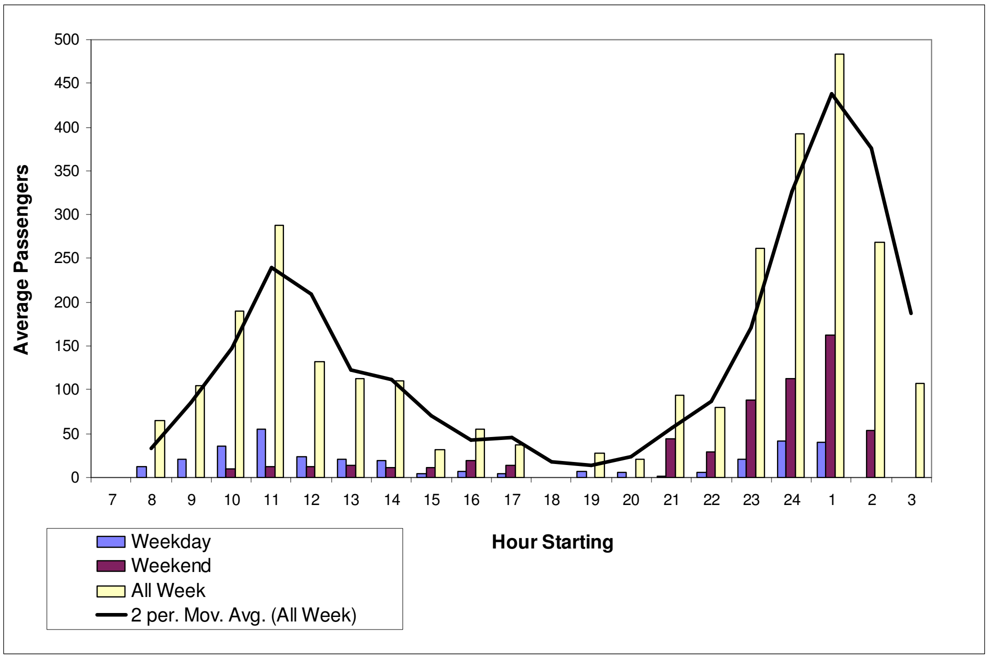
Table 4.2: Average Delays and Total Demand (Delays in Minutes)

Rank	Passenger Departures	Cab Departures	Average Passenger Delay	Average Cab Delay
Bedford Street, North Shields	655	630	1.08	9.23
Metro Station, North Shields	2,075	1,505	0.31	6.89
Church Way, North Shields	140	58	0.00	4.38
Metro Station, Percy Main	2	2	0.00	0.00
New Quay, North Shields	64	30	0.35	0.00
Front Street, Tynemouth	417	215	0.13	54.19
South Parade, Whitley Bay	2,991	1,493	0.30	12.41
Park View Shopping Centre	310	256	0.78	0.80
High Street West, Wallsend	48	42	0.94	2.14
Station Road, Wallsend	187	145	0.27	1.20
Total	**6,889**	**4376**	**0.38**	**10.72**

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 09:00 and 03:00. There is a peak demand during the week between the hours of 1000 and 1200, 2300 and 0100. The peak demand at the weekend is concentrated between 2300 and 0300.

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



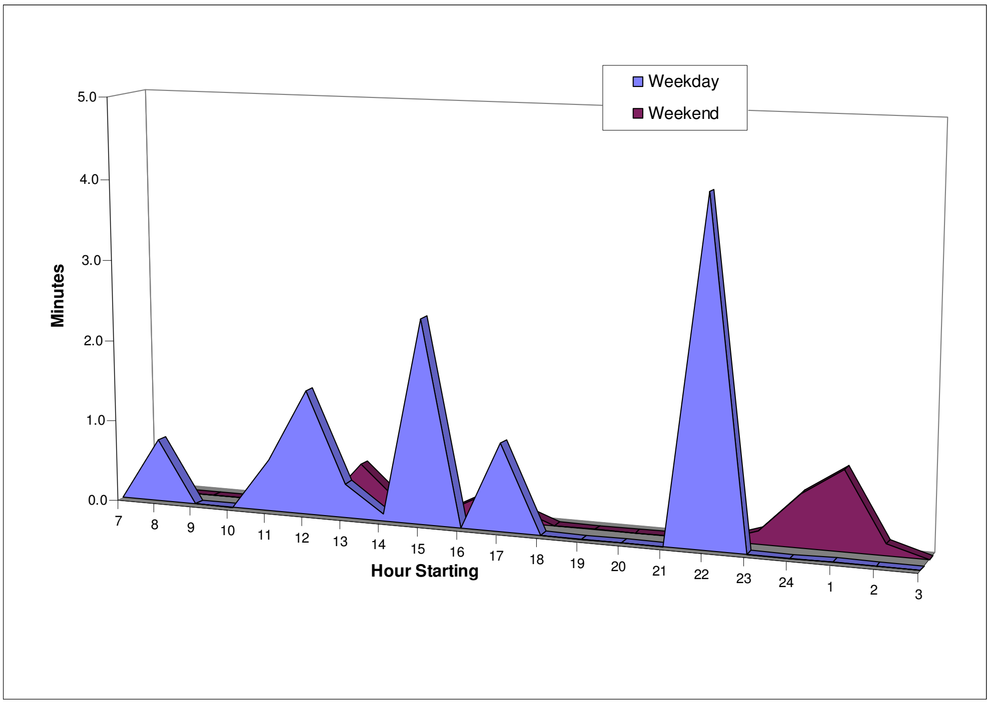
4.4.2 The level of peaking late at night relative to the daytime is high; we therefore conclude that this is a 'highly peaked' demand profile. This has implications for the interpretation of the results (see section 4.7 below).

4.4.3 Recent best practice guidance, issued by the DfT, states that delays associated with peaks in demand (such as morning and evening rush hours, or pub closing times) should be treated as 'significant' as they are often the most popular times for consumers to use taxis. However, in R v Great Yarmouth Borough Council ex p Sawyer (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.

4.4.4 It should also be noted that these 'peaks' may not be the direct result of the authority's limitation policy as they can also occur in de-restricted authorities. For example, we observed high passenger delays at ranks during weekend late night peak periods in Leicester in 2000 despite the fact that there had been no numerical limit in place in the hackney carriage market for over 10 years. Similar results were obtained in Bristol, an authority that had been de-restricted for 4 years at the time of the study. Halcrow believes that the DfT is mistaken in its assertion that passenger delay late at night associated with short term peaks in demand is evidence of the detrimental impact of quantity control regulations. Rather, it is an inevitable consequence of the concentration of demand i.e. it is caused by the same fundamental principles that cause queues in banks, post offices and supermarkets.

4.4.5 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 1400 - 1600 and 2100 - 2300 and weekends between 2300 - 0200. The level of passenger delay is greatest between 2100 and 2300 on weekdays at a peak of 4.17 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 - 15.68%
- **Delay > 1 minute - 1.18%**
- Delay > 5 Minutes - 0.03%

4.5.2 The results indicate that almost 16% 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%. It is this proportion that is used within the ISUD as the 'Generality of Passenger Delay.'

4.6 Deriving the Significant Unmet Demand Index Value

4.6.1 The data above 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)	0.38
• Peak Factor (Figure 4.1)	0.5
• General Incidence of Delay (paragraph 4.5.1)	1.18
• Steady State Performance (Table 4.1)	8
• Seasonality Factor (paragraph 3.4.5)	1
• Latent Demand Factor (paragraph 5.3.2)	1.168
ISUD (0.38*0.5*1.18*8*1*1.168)	**2.1**

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

4.7 North Tyneside Compared to Other Districts

4.7.1 Comparable statistics are available from 44 local authorities and these are listed in Table 4.3. 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.

4.8 Results of the Comparison with Previous Studies

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

- population per hackney carriage is lower than the average overall value i.e. Tyneside has a higher than average provision;
- the proportion of passengers, who travel in hours where some delay occurs, is 16%, which is lower than the average (30%) for the districts analysed. The proportion of passengers travelling in hours where the delay equals or exceeds one minute (1.2%) is also below the average of 16% for all the authorities;
- overall average passenger delay at .38 minutes is lower than the average value;
- overall average cab delay is lower than the average for all the districts shown;
- the proportion of weekday daytime hours is which excess demand conditions are observed is 8% which is the average for all authorities shown; and demand in North Tyneside is considered to exhibit a high degree of peaking late at night compared to the rest of the day.

Table 4.3 A Comparison of North Tyneside with Other Authorities Studied (values in italics make up ISUD)									
District and Year of Survey	**Population per Hackney**	**Proportion Waiting at Ranks**	***Proportion Waiting >= 1 Min***	**Proportion Waiting >= 5 Mins**	***Average Passenger Delay***	**Average Cab Delay**	**% Excess Demand**	**Demand Peaked, Yes=0.5 No=1**	**ISUD Indicator Value**
North Tyneside 2008	**971**	**15.68**	***1.18***	**0.03**	***0.38***	**10.72**	**8**	**0.5**	**2**
Scarborough 2008	1,111	11.75	5	1.06	0.49	7.74	7	0.5	0
York 2008	1,146	31	11.5	6.74	3.21	5.42	31	0.5	645
Stirling 2008	1,265	25	18	0.3	0.7	10.94	2	0.5	38
Torridge 2008	1,202	7	0.94	0	0.12	14.99	0	1	0
Richmondshire 08	723	5	1	0.07	0.22	34.32	1	0.5	0.4
Exeter 2007/08	1,883	7	4	0.6	0.33	15.27	6	1	9
Manchester 07	394	21	6	2.28	1.59	10.24	14	1	174
Bradford 07	1,630	18	2	0.03	0.23	17.64	5	1	2
Barnsley 2007	3,254	5	8	0.22	1.32	11.93	5	1	58
Broadstairs 2006	1,000	13	13	10	3.25	23.97	4	1	177
Margate 2006	1,622	4	1	0	0.05	33.14	0	1	0
Ramsgate 2006	1,026	2	2	2	0.49	19.57	13	1	13
Plymouth 2006	669	7	3	1	0.52	11.58	1	1	2
Brighton 2006	508	52	23	6	0.73	7.64	6	0.5	50
Thurrock 06	1,590	32	13	1	0.22	15.27	0	1	0
Trafford 06	2,039	55	38	6	1.09	13.15	5	1	249
Hull 06	1,433	45	23	4	0.68	10.2	5	0.5	38
Leicester05	880	21	11	1	0.35	19.36	3	1	12
Bournemouth 05	656	20	11	2	0.37	12.25	1	0.5	2
Rotherham 04	5,200	45	37	3	1.09	9.68	4	1.0	168
Bradford 03	2,171	19	6	0.77	0.25	14.89	6	1.0	9
Oldham 03	2,558	30	12	0.79	0.48	14.8	7	1.0	40
Blackpool 03	556	21	4	0.3	0.13	12.4	6	1.0	3
Thurrock 03	1,607	43	14	1.01	0.50	12.5	2	1.0	14
Wolverhampton 03	3,113	50	31	7.39	1.49	11.18	14	1.0	647
Bournemouth 02	702	25	15	2	0.67	9.97	1	0.5	5
Brighton 2002	540	60	35	12	1.11	8.31	5	0.5	97
Exeter 02	2,353	47	18	3	0.71	10.12	20	1.0	256
Wigan 02	2,279	28	10	0	1.17	11.98	6	1.0	70
Cardiff 01	656	51	29	6	0.83	8.77	14	0.5	168
Edinburgh 01	373	47	29	9	1.27	8.77	13	1.0	479
Torridge 01	1,298	25	21	0	0.51	9.32	8	0.5	43
Worcester 01*	941	40	4	1	0.46	12.3	8	0.5	7
Ellesmere Port 01	2,527	80	48	17	2.49	4.23	49	0.5	2,928
Southend 00	895	46	29	8	1.92	8.08	4	1.0	223
South Ribble 00 *	485	12	0.25	0.25	0.07	11.27	0	1.0	0
Leeds 00	1,693	83	61	33	5.03	7.92	36	1.0	11,046
Sefton 00	1,069	18	8	0.6	0.28	12.95	6	1.0	13
Leicester 00 *	956	10	7	3	1.17	20.19	1	1.0	8
Castle Point 00	2,286	28	12	3	0.74	8.6	2	0.5	9
Bedford 00	2,931	25	15	10	0.86	6.86	4	1.0	52
Thurrock 00	1,406	28	14	2	0.63	10.66	6	1.0	53
Manchester 00	569	59	40	13	1.78	6.79	23	1.0	1,638
AVERAGE	**1,458**	**30**	**16**	**4**	**0.95**	**13**	**8**		

5 Evidence of Suppressed Demand - Public Attitude Pedestrian Survey Results

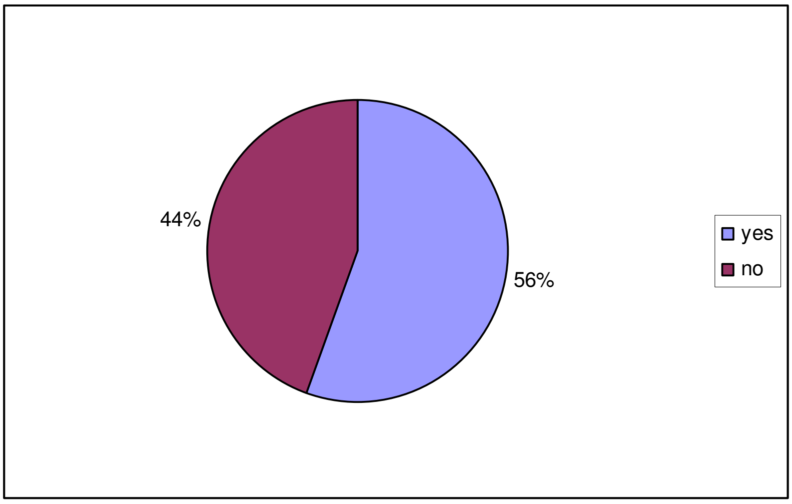
5.1 Introduction

5.1.1 Some 549 on-street public interview surveys were carried out in November 2008. 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.

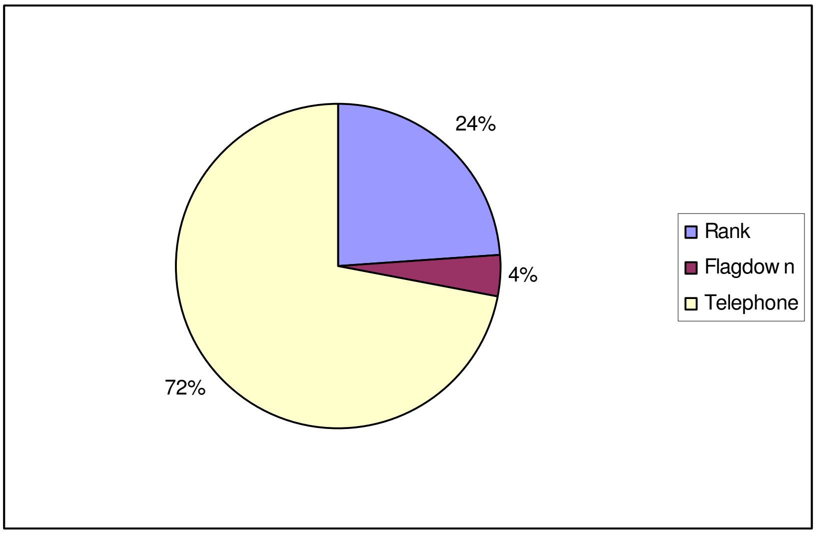
5.1.3 The survey found that 55.6% of respondents had used a taxi in North Tyneside within the last three months. The results are displayed in Figure 5.1.

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 24.0% of tripmakers stated that they hired their taxi at a rank. Some 72.0% of hirings were achieved by telephone with 4.0% of tripmakers obtaining a taxi by on-street flagdowns. Figure 5.2 reveals the pattern of taxi hire.

Figure 5.2: Method of Hire for Last Trip

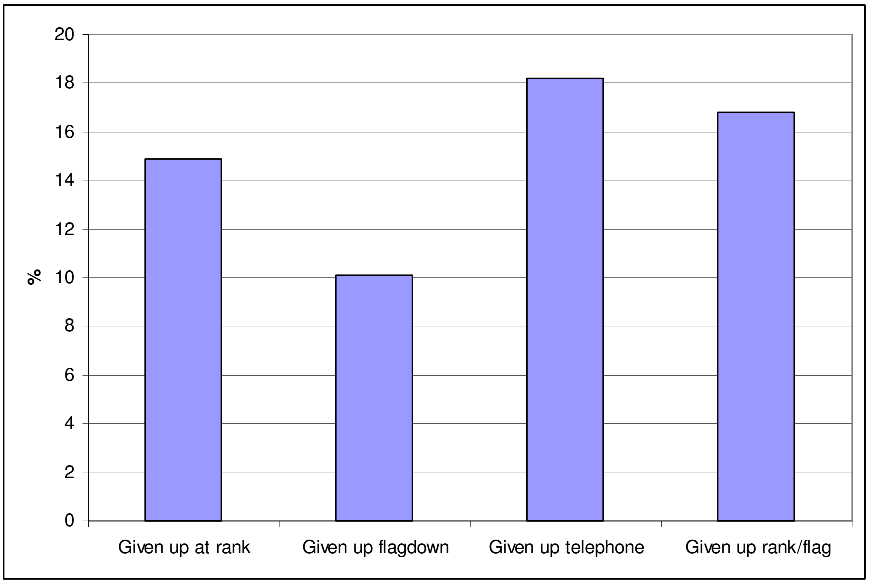


5.1.5 Respondents were asked if they were satisfied with the time taken and the promptness of the taxis arrival. The majority of people were satisfied with the delay on their last taxi journey (94.0%).

5.1.6 Tripmakers were asked to rate their last taxi journey against a number of factors. The majority of respondents gave the helpfulness of driver, drivers' knowledge of the area, value for money and overall quality of service a rating of 'good' or 'very good'. For those who stated poor for any aspect of their journey, the reason that it was too expensive.

5.1.7 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 North Tyneside in the last three months. The results are documented in Figure 5.3.

Figure 5.3: Latent demand by method of hire – Given up trying to make a hiring?



5.1.8 Figure 5.3 highlights that 14.9% had given up waiting for a taxi at a rank, with 10.1% having given up via flagdown and 18.2% via telephone. Some 16.8% of respondents had given up attempting to hire a vehicle by rank or flagdown.

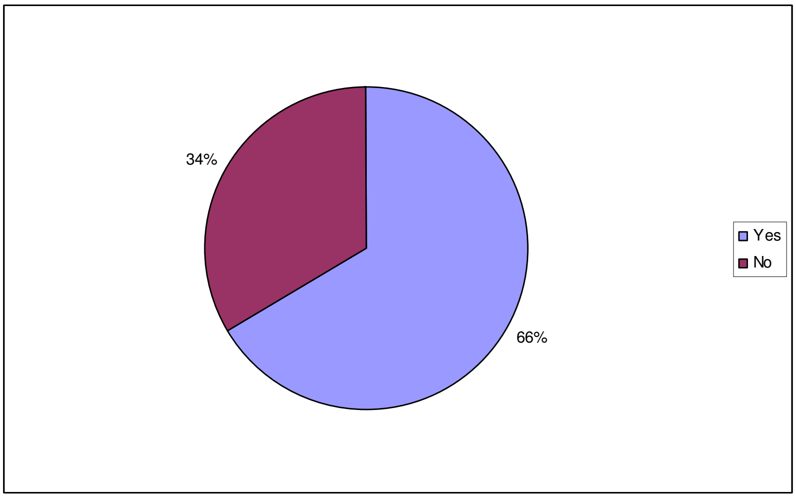
5.1.9 Those who had given up waiting for a vehicle in North Tyneside were asked for this location. The most popular locations were:

- North Shields;
- Wallsend;
- Whitley Bay; and
- Tynemouth.

5.1.10 The majority of respondents (96.4%) were waiting for any type of vehicle, whilst 1.2% were waiting for a wheelchair accessible vehicle and 1.6% were waiting for a vehicle to seat more than four people.

5.1.11 Respondents were asked if they thought the taxi service in North Tyneside could be improved. The responses indicate that 34% of respondents thought that taxi services in North Tyneside could be improved. The results are documented in Figure 5.4.

Figure 5.4: Could taxi services be improved?



5.1.12 Those who considered that taxi services needed improvement were asked how they could be improved. Of those stating that the service could be improved some 59.0% of responses stated that taxis in North Tyneside could be cheaper. Some 26.2% stated that there was a need for better vehicles with 10.4% stating that there was an 'other' way in which services could be improved. Suggestions included:

- *'Arrive on time'*
- *'Safer drivers'*
- *'Improved operator service'*

5.2 Safety & Security

5.2.1 Respondents were asked whether they felt safe when using taxis in North Tyneside. The majority of respondents felt safe using taxis during the day (98.9%); and some 97.7% stated that they felt safe using taxis at night in North Tyneside.

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 North Tyneside. Of the 12 respondents who felt unsafe during the day and/or at night using taxis, some 41.7% of responses stated that women drivers and 33.3% said more taxi marshals at ranks 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 7.2% 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:

- Metro stations;
- Tynemouth;
- Tynemouth Road;
- High Street;
- Whitley Bay;
- Wallsend Metro.

Summary

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

- Over 70%of hirings are by telephone;
- High levels of satisfaction with delay on last trip
- Some 16.8% of respondents had given up trying to obtain a vehicle by rank or flagdown;
- Some 33.7% of respondents feel that taxi services in North Tyneside could be improved (need to be cheaper); and
- Majority 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.

6.1.2 Direct and/or indirect consultation with these key stakeholders was undertaken. The full consultation is set out in Appendix 4. The responses specifically related to their opinions of whether there is significant unmet demand in North Tyneside is set out below.

6.2 Direct Consultation

6.2.1 A series of focus groups were held in November 2008 with a range of stakeholders to glean their views regarding the taxi and private hire service across North Tyneside. The comments are summarised below and appended in full to this report.

<u>Tourism</u>

6.2.2 A Tourism Development Officer from North Tyneside Council attended the focus group. The representative felt that there were sufficient taxis at night in North Tyneside especially in Tynemouth. He stated that many tourists used private hire services rather than hackney carriages. Comment was made as to the success of the marshals based at the Port of Tyne in guiding people into vehicles and providing them with tourism information.

6.2.3 With regard to training it was felt that the trade would benefit from receiving customer service training as they are often the first point of contact for tourists. Reference was made to the 'ambassador' scheme in operation in Gateshead and how this would be beneficial to be offered in North Tyneside.

6.2.4 It was felt that ranks were located in the correct places across the borough.

Hackney Association

6.2.5 Four representatives attended the meeting. The association felt that there was no significant unmet demand and they were in favour of maintaining the numerical limit. It was stated that the trade had been in decline with trade on Saturday nights slowly decreasing in demand. The Licensing Act had spread out the work on a Saturday night to 4am.

6.2.6 The resultant effect of a decrease in work and undertaking fewer jobs is that some members of the trade are losing their knowledge of the area.

6.2.7 With regard to vehicles the association wanted the local authority to put a stop on the licensing of Fiat Doblos. The association considered the vehicles to be unsafe due to the fact that in the event of a rear impact accident wheelchair users would be unable to exit the vehicle.

6.2.8 The association considered that new drivers should undergo an English language test. With regard to training the association felt that the NVQ test was simply a revenue generator and didn't particularly teach drivers anything new.

6.2.9 Comment was made as to the desire by the authority to relocate the Tynemouth rank. It was felt that this would cause problems as customers may attempt to hire hackneys from the middle of the rank. The association also wanted to see a blue cube identifying the rank. The trade feel that the rank at the Port of Tyne should not be revoked. The trade also wanted the South Parade rank in Whitley Bay to be extended. The association expressed a desire to have railings installed at all ranks. The trade wanted ranks to be incorporated into all new developments and did not want any ranks removed.

6.2.10 In terms of fares the association wanted to see an annual review of fares.

6.2.11 The association made reference to the bus gate at Silverlink and expressed a wish to be given access to this bus gate.

6.2.12 The association stated that they don't feel appreciated by the local authority in terms of the service that they provide. They wish to see the consultation meetings between the trade and the authority reinstated.

Private Hire Association

6.2.13 A representative of the private hire association attended the focus group. He felt that the survey being undertaken was being used as a tool to maintain the current limit and not to identify whether there was any unmet demand. He had no opinion over the current numerical limit but felt that the Traffic Commissioner should undertake responsibilities for taxi licensing.

6.2.14 The association felt that there was little enforcement of over ranking and that there was a grossly inadequate amount of rank spaces. In addition, some rank spaces are used for parking.

6.2.15 With regard to the Port of Tyne, the association wanted any reference to a hackney carriage rank to be removed from council documentation.

6.2.16 With regard to training, the representative felt that the knowledge test is not required anymore as drivers have the use of satellite navigation. Other training, such as the NVQ, should be optional as it was considered to be a waste of money to test good drivers. The representative also commented that being tested once in a drivers career does not ensure a good driver.

6.2.17 He stated that he did not agree with the hackney fare structure and felt that they were not competitive.

Disability representatives

6.2.18 A representative attending the meeting made reference to the fact that vehicle design had changed considerably over recent years. He stated a desire to see a good percentage of wheelchair accessible vehicles but wanted to maintain a mixed fleet policy. He noted that users found it very difficult to obtain an accessible vehicle after 6pm.

6.2.19 The representative had received anecdotal information about drivers refusing to take wheelchair passengers, users being overcharged and drivers refusing to accept guide dogs.

6.2.20 With regard to vehicles the representative wanted a greater range of vehicles to be licensed in North Tyneside e.g. Mercedes Veto. Users had also stated that they did not feel safe using channel ramps to access vehicles.

6.2.21 It was suggested that taxi drivers should be seen as part of the transport infrastructure and should act in a professional manner. Reference was also made to the fact that taxi drivers were often undervalued and needed to increase their self esteem.

6.2.22 Training was considered to be essential. It was felt that training should be more than disability awareness and should include passenger handling and customer service. Many drivers were felt to have got into bad practice so it was felt that all existing drivers should go on a refresher course.

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:

- North Tyneside 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 written comments received related to opinions on whether there is currently significant unmet demand in North Tyneside generally felt that there is an adequate supply of both hackney carriage and private hire vehicles across all times of the day and across all areas within North Tyneside. The comments received are summarised below and appended in full to this report:

Supply of Hackney Carriage and Private Hire vehicles

6.4.2 The respondents felt that there is an adequate supply of both hackney carriage and private hire vehicles across all times of the day and across all areas within North Tyneside.

Image of the trade

6.4.3 There was a mixed opinion regarding the type and quality of the vehicles licensed. Some respondents felt that it could be better, highlighting the need for additional wheelchair accessible vehicles, whilst others felt that the vehicles are generally smart and presentable.

6.4.4 With regard to the attitude and quality of the drivers, respondents were generally satisfied, although some stated that there is room for improvement.

6.4.5 It was felt by all respondents that there is a need for additional training for drivers, especially for wheelchair dependent users. Other types of suggested training included behaviour management, language and communication training.

Adequacy of rank locations

6.4.6 With regard to the adequacy of ranks, it was felt by one respondent that more are needed. Another commented that the locations of the rank in Tynemouth can cause problems to parked vehicles.

6.4.7 None of the respondents felt that anything could be done to improve the accessibility of ranks in North Tyneside.

Vehicle Accessibility

6.4.8 It was felt by respondents that additional wheelchair accessible vehicles are needed as confirmed times of arrival cannot be given due to ‘drivers other commitments.’

Fares

6.4.9 One respondent commented that fares are very high for wheelchair users whilst another stated that all fares are paid on a contract basis.

Advertising

6.4.10 There was a mixed response with regard to the advertising of both hackney carriages and private hire vehicles. The majority of respondents felt that there is sufficient advertising, whist one respondent stated that there is not enough advertising.

Safety

6.4.11 All respondents stated that they feel safe using taxis in North Tyneside, although some respondents commented that they do not feel safe waiting at ranks in North Tyneside.

Transport Integration

6.4.12 With regard to how well taxis complement other types of transport in North Tyneside, one respondent commented that they fit in 'fairly well,' suggesting that transport integration in North Tyneside is adequate but there is further room for improvement.

Additional Comments

6.4.13 When asked for any additional comments, one respondent stated that there should just be a generic 'taxi' business instead of hackney carriages and private hire vehicles.

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.

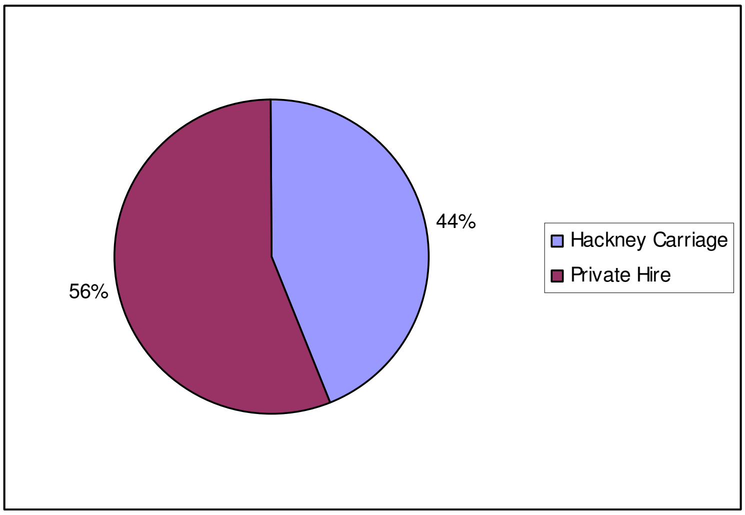
7.2 Survey Administration

7.2.1 The survey was conducted through a self completion questionnaire. These were sent to 1,300 licensed public and private hire drivers in North Tyneside. A total of 148 questionnaire forms were completed and returned, giving a response rate of 11.4%. 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

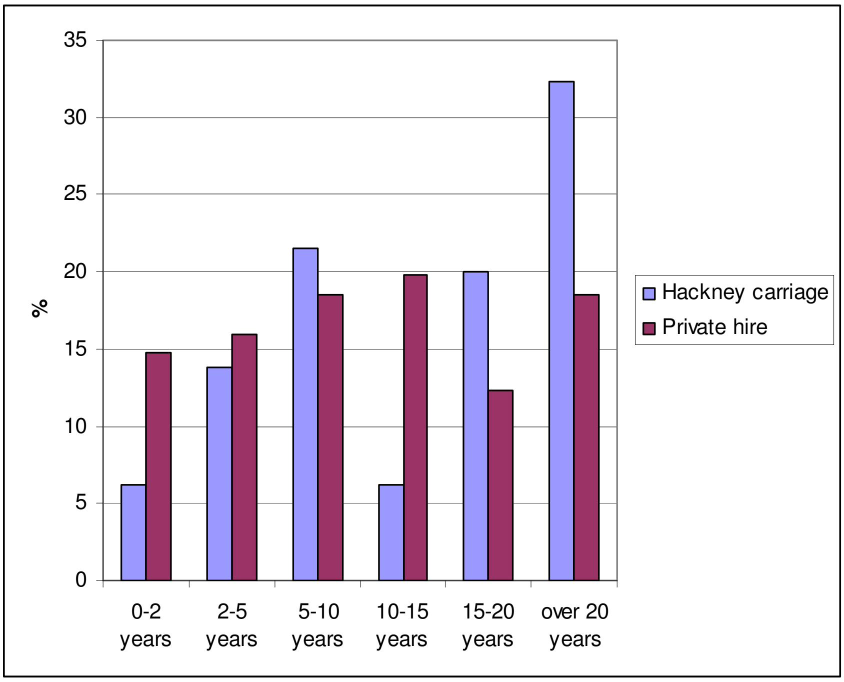
7.3.1 The responses provided have been disaggregated on a hackney carriage and private hire trade as shown in Figure 7.1 below.

Figure 7.1: Breakdown of Responses between Trades



7.3.2 Figure 7.2 indicates that over half of hackney carriage respondents (52.3%) have been involved in the North Tyneside taxi trade for more than 15 years as have 30.8% of the private hire trade.

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



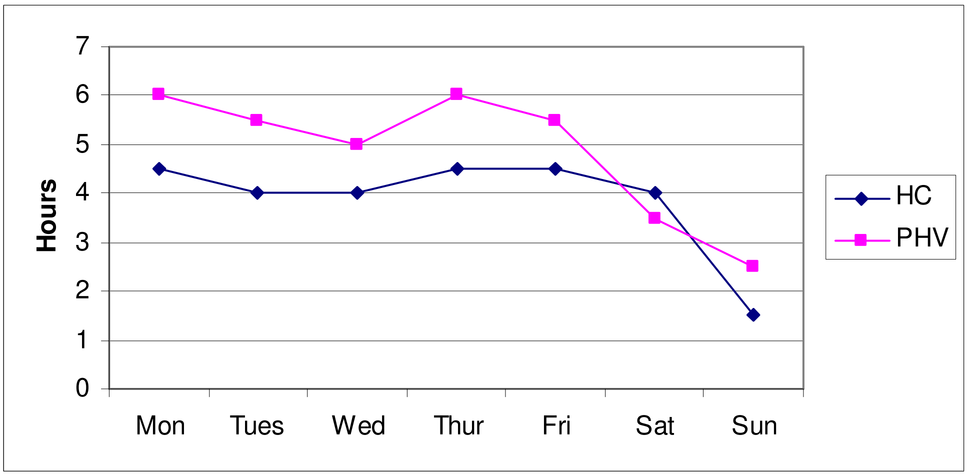
7.4 Driving

7.4.1 Respondents were asked what type of vehicle they drive most frequently. The majority of hackney carriage drivers (60.6%) and private hire drivers (96.3%) 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 53 hours per week compared with an average of 51hours per week for the private hire trade.

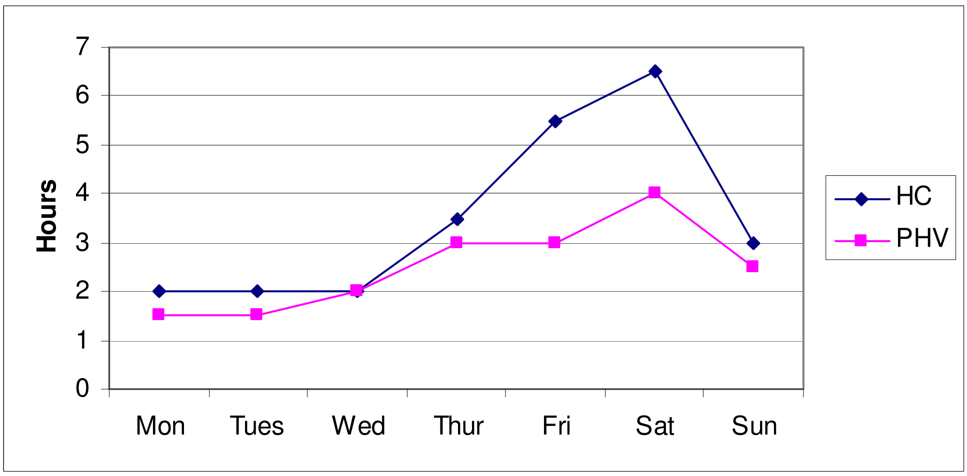
7.4.3 Respondents were asked to state how many hours they worked at different times of day during a typical week. Figure 7.3 documents the average hours worked during the daytime period (06:00-18:00) for each day of the week. On average, the private hire trade work longer hours during the day compared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

Figure 7.4: Average night time hours worked



7.4.5 The trade were asked whether the Licensing Act 2003 had had an effect on their typical working week. Some 73.7% of hackney carriage respondents stated that it had had an effect on them compared with 32.5% 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	23	54.8	18	69.2
Work for longer hours	33	78.6	12	46.2
Other	8	19.0	4	15.4

7.4.7 Some 78.6% of hackney carriage respondents stated that they work longer hours whilst 69.2% of private hire drivers work later in the evenings.

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 49.1% of hackney respondents and 57.0% of Private Hire respondents stated that they carry disabled passengers 1 to 5 times a week.

Table 7.2: Frequency of Transport of Disabled Persons

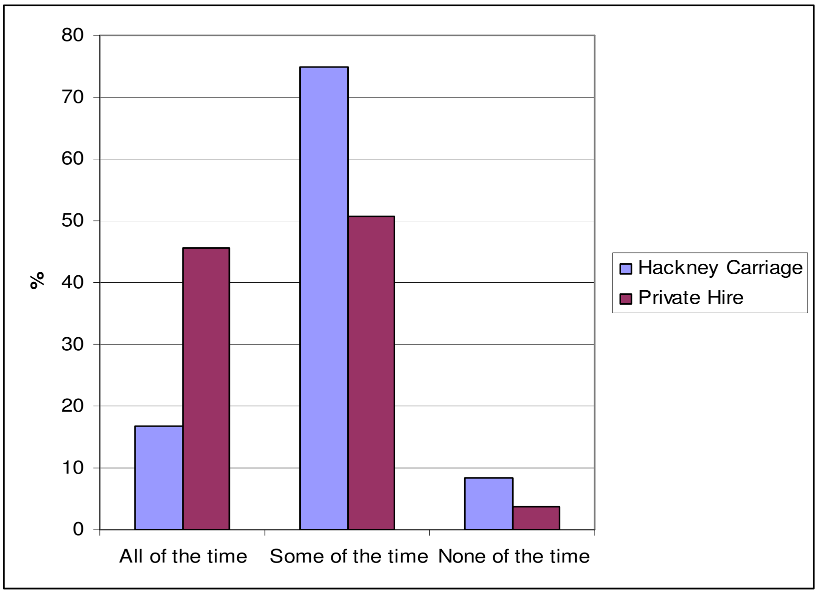
	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Never	10	18.9	13	16.5
1to 5	26	49.1	45	57.0
5 to 10	9	17.0	12	15.2
10 to 20	4	7.5	6	7.6
More than 20	4	7.5	3	3.8
Total	53	100.0	79	100.0

7.5 Safety & Security

7.5.1 The questionnaire asked if drivers had been attacked by a passenger within the last year. Some 15.5% of hackney carriage drivers and 9.0% of private hire drivers stated that they had been physically attacked in the last year. Whilst 67.2% of hackney carriage respondents and 51.3% of private hire respondents had been verbally attacked.

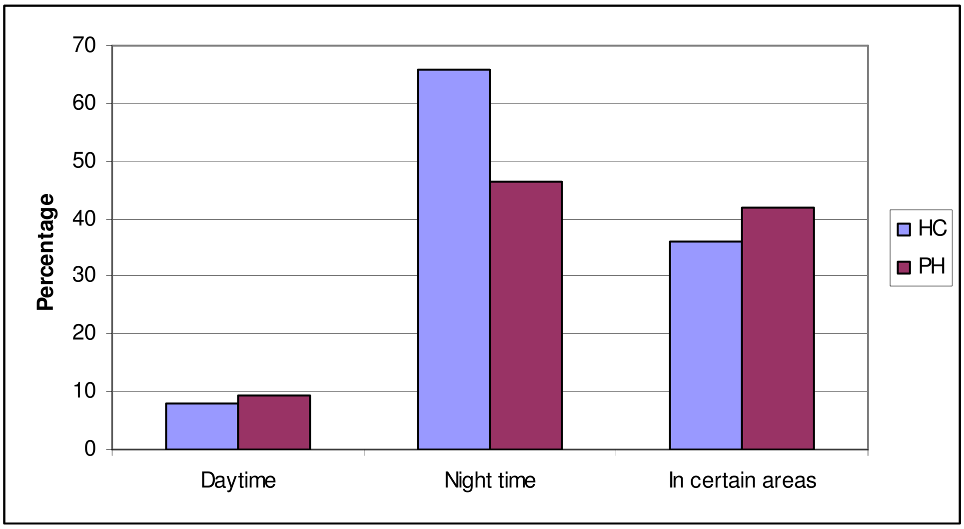
7.5.2 Respondents were then asked if they felt safe whilst working as a taxi driver in North Tyneside, the results of which are shown below in Figure 7.5. The majority of all hackney carriage respondents stated that they felt safe some of the time (75.0%), as did the majority of the private hire respondents (50.6%).

Figure 7.5: Do you feel safe whilst working as a Taxi Driver in North Tyneside?



7.5.3 Of those stating that they felt unsafe, 66.0% of hackney carriage and 46.5% of private hire respondents stated that they felt unsafe whilst working at night in North Tyneside, as shown in Figure 7.6.

Figure 7.6: When do you feel unsafe as a taxi driver in North Tyneside?



7.5.4 Some 36% of the hackney carriage trade stated that they feel unsafe in certain areas of North Tyneside, as did 42% of the private hire trade. The areas most commonly reported as being unsafe were;

- North Shields;
- Percy Main;
- Walker; and
- Byker

7.6 Ranks

7.6.1 Members of both trades were asked whether they believe there is sufficient rank space in North Tyneside. Some 85.5% of hackney carriage respondents stated that there was not sufficient rank space in North Tyneside, whilst the majority of private hire respondents said that there was enough rank space (72.9%).

7.6.2 Respondents were then asked if there were any areas in North Tyneside where new ranks should be introduced. Some 89.3% of private hire respondents said there were no areas where new ranks were required, whilst 70.6% of hackney carriage respondents said there were areas where new ranks were needed.

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

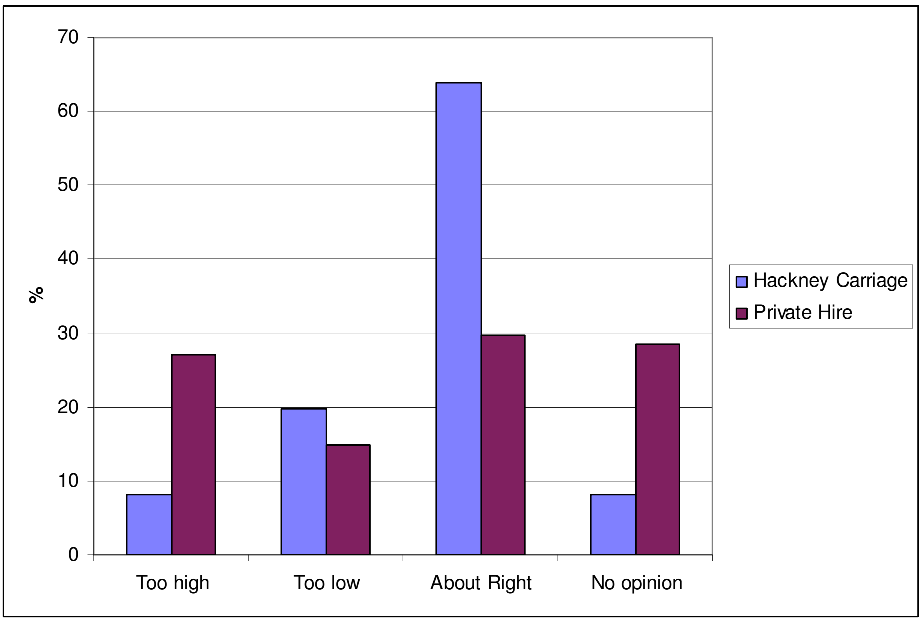
- Whitley Road, Whitley Bay
- Station Road North,
- Forest Hall; and
- North Shields.

7.7 Fares

7.7.1 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.

7.7.2 Some 63.9% of hackney carriage respondents considered hackney carriage fares to be 'about right'.

Figure 7.7: View of Hackney Carriage Fares



7.8 Training

7.8.1 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 (70.5%) and private hire trade (58.2%) were of the opinion that training was not sufficient.

7.8.2 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	35	81.4	32	69.6
Customer Care	31	72.1	31	67.4
Disability Awareness	31	72.1	26	56.5
Driving Ability Test	21	48.8	32	69.6
Other	5	11.6	13	28.3

7.8.3 The hackney carriage trade felt that English language, customer care training and disability awareness are the most important training they would like to see offered to drivers with 81.4%, 72.1% and 72.1% respectively. The private hire drivers were of a similar opinion with 69.6% perceiving English language and driving ability test to be important and 67.4% perceiving customer care training to be important.

7.8.4 Respondents were then asked whether this training should be compulsory or voluntary. Of those who answered this question, some 71.6% of the private hire trade said that the training should be compulsory as did 77.6% of the hackney carriage respondents. The results are shown in Table 7.4.

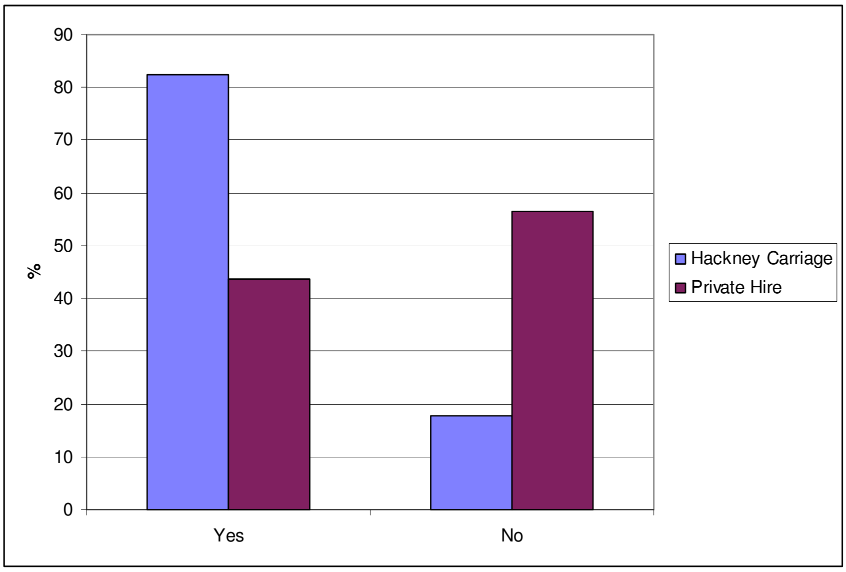
Table 7.4: Should this training be compulsory or voluntary?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	**Percent**	**Frequency**	**Percent**
Compulsory	38	77.6	48	71.6
Voluntary	11	22.4	19	28.4
Total	49	100.0	67	100.0

7.9 *Taxi Market in North Tyneside*

7.9.1 Members of both trades were asked if they were aware that North Tyneside Council enforces a numerical limit of 204 on the number of hackney carriage vehicle licences in the city. The results are outlined in Figure 7.8.

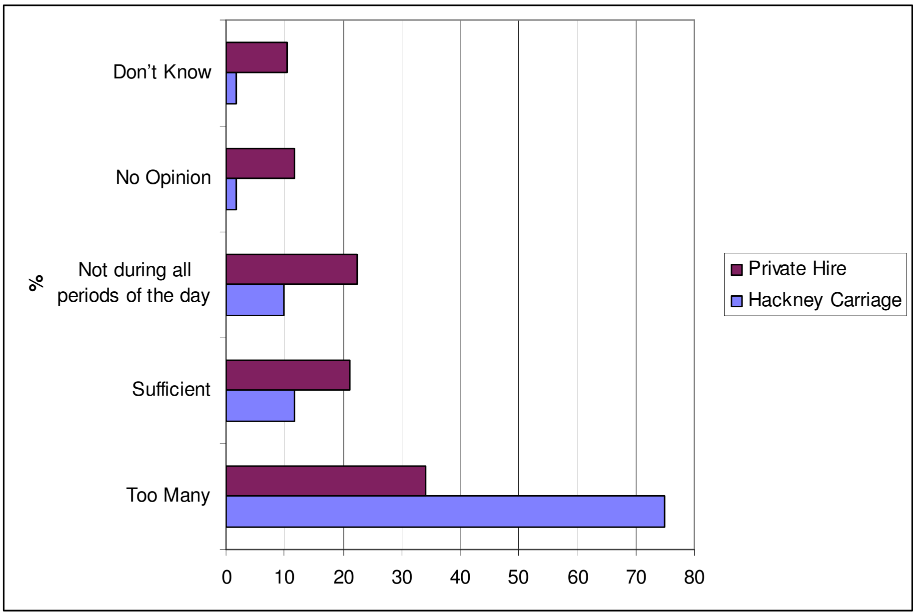
Figure 7.8: Were you aware that there is a numerical limit on the number of hackney carriage vehicle licences in North Tyneside?



7.9.2 The majority of the hackney carriage respondents were aware about the numerical limit (82.3%), although only 43.6% of private hire respondents were aware of the restrictions.

7.9.3 Members of both trades were asked whether they consider there to be sufficient hackney carriages to meet the current level of demand in North Tyneside. Figure 7.9 indicates that the majority of respondents from the hackney carriage trade (75.0%) consider there to be too many hackney carriages, compared to 34.2% of private hire drivers. Some 22.4% of private hire respondents stated that there were insufficient hackney carriages to meet the demand, whilst 11.7% of hackney carriage respondents felt that there were sufficient hackney carriages in North Tyneside.

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



7.9.4 Those respondents stating that there were insufficient hackney carriages operating in North Tyneside 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?

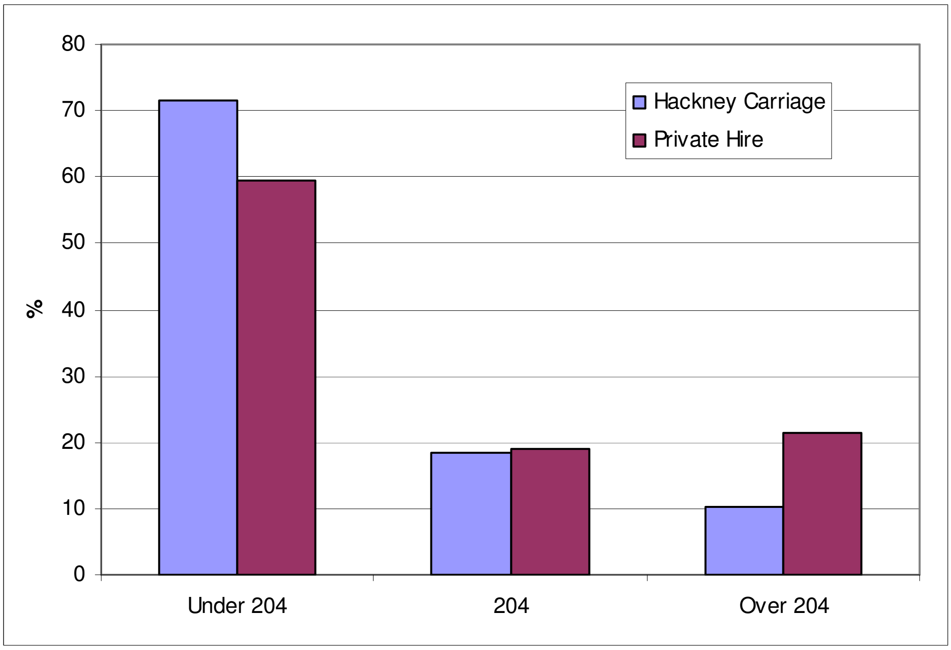
	Hackney Carriage Trade		**Private Hire Trade**	
	Frequency	**Percent**	**Frequency**	**Percent**
During the daytime	2	33.3	0	0.0
During the evening/night	2	33.3	4	25.0
All day and night	2	33.3	12	75.0
Total	6	100.0	16	100.0

7.9.5 Of those respondents that felt there was an insufficient supply of hackney carriages operating in North Tyneside, it was felt by 33.3% of the hackney carriage respondents and 75.0% of private hire respondents that more hackney carriages were required in North Tyneside at all times of day and night.

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

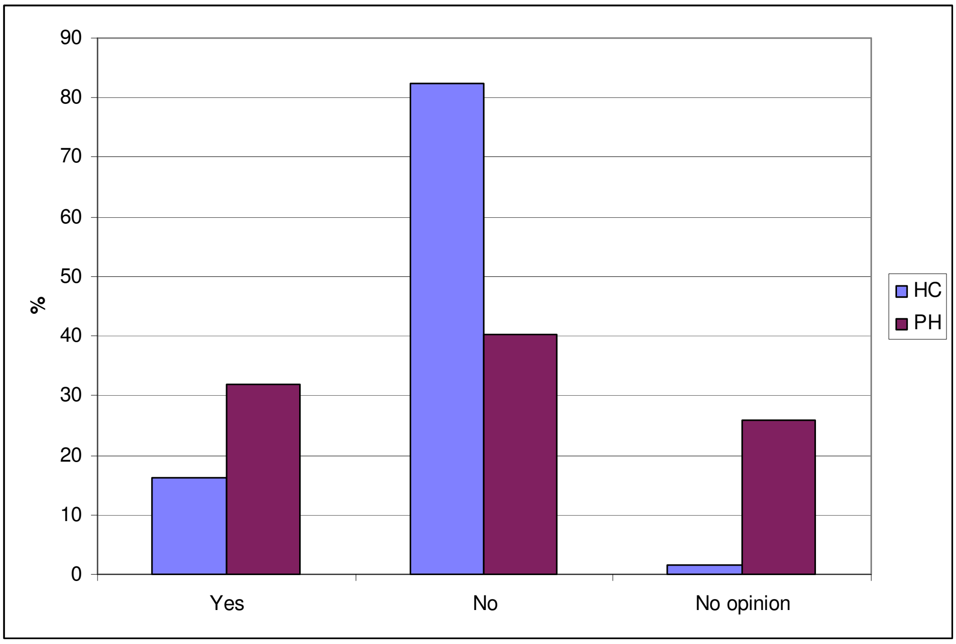
7.9.7 Of those drivers who responded, 18.4% of the hackney carriage trade felt that the fleet size should stay at the current number, as did 19.0% of the private hire trade. The majority of the private hire trade (59.5%) felt that the fleet should be more than 204 as did 71.4% of hackney carriage respondents.

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



7.9.8 All respondents were asked to state if they thought that North Tyneside 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 North Tyneside Council remove the numerical limit?



7.9.9 The majority of respondents from the hackney carriage trade (82.3%) felt that the numerical limit should not be removed compared with 40.3% of the private hire respondents. Some 31.8% of the private hire respondents thought the limit should be removed.

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

<u>Congestion</u>

7.9.11 The majority of respondents from the hackney carriage trade (70.7%) felt congestion would increase, compared to 37.3% from the private hire trade felt this would be the case.

<u>Fares</u>

7.9.12 Just under half of hackney carriage respondents (46.3%) and just over half of private hire respondents (56.3%) considered that there would be no effect on fares following de restriction.

Passenger Waiting Times

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

Vehicle Quality

7.9.14 Over half of respondents from the hackney carriage trade felt hackney vehicle and private hire vehicle quality would decrease, compared to 31.9% of private hire trade respondents.

Effectiveness of Enforcement

7.9.15 With regard to effectiveness of enforcement, 56.1% of the hackney carriage trade were of the opinion that removing existing licence restrictions would result in a decrease. 43.3% of the private hire trade were of the same opinion.

Illegal Plying for Hire

7.9.16 In terms of illegal plying for hire by private hire vehicles, 46.4% of the private hire trade were of the opinion that a change in licence restriction conditions would have no effect, compared with 50.8% of hackney carriage drivers stating that it would increase as a result of de regulation.

Over Ranking

7.9.17 Both the hackney carriage and private hire trade felt over ranking would increase, with a response of 79.3% and 67.6% respectively.

Customer Satisfaction

7.9.18 With regard to customer satisfaction, 44.1% of hackney carriage drivers felt that it would decrease as a result of licence de regulation. Whereas 40.3% of the private hire trade felt that there would be no effect.

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

	Hackney Carriage Trade			Private Hire Trade		
	Increase	No Effect	Decrease	Increase	No Effect	Decrease
Traffic Congestion	70.7	27.6	1.7	37.3	55.2	7.5
Fares	27.8	46.3	25.9	23.9	56.4	19.7
Passenger waiting times at ranks	10.5	64.9	24.6	7.5	32.8	59.7
Passenger waiting time when flagdown	1.8	75.4	22.8	4.8	30.1	65.1
Passenger waiting time by telephone	13.5	65.4	21.2	14.7	48.5	36.8
Hackney carriage vehicle quality	22.0	15.3	62.7	20.3	47.8	31.9
Private hire vehicle quality	13.0	40.7	46.3	28.6	60.0	11.4
Effectiveness of enforcement	15.8	28.1	56.1	20.9	43.3	35.8
Illegal plying for hire – private hire	50.8	37.3	11.9	20.3	46.4	33.3
Illegal plying for hire – unlicensed	48.2	39.3	12.5	27.5	49.3	23.2
Over ranking	79.3	13.8	6.9	67.6	26.5	5.9
Customer satisfaction	18.6	37.3	44.1	34.7	40.3	25.0

7.9.19 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	15	24.2	13	17.8
Disagree	3	4.8	5	6.8
Neither agree nor disagree	2	3.2	16	21.9
Agree	7	11.3	15	20.5
Strongly agree	35	56.5	24	32.9
Total	62	100.0	73	100.0

7.9.20 Over half of hackney carriage respondents (56.5%) strongly agree with the statement that there is not enough work to support the current number of hackney carriages. Some 32.9% of private hire strongly agree that there is not enough work.

7.9.21 The following comments were recorded:

- 'Not enough work'
- 'Long waiting times between fares'
- 'Too many cabs, overcrowded ranks'
- Work dependent on day of week.

7.9.22 The second statement was 'Removing the limit on the number of hackney carriages in North Tyneside 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 North Tyneside would benefit the public by reducing the waiting time at ranks'

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	**Percent**	**Frequency**	**Percent**
Strongly disagree	35	61.4	14	20.0
Disagree	4	7.0	10	14.3
Neither agree nor disagree	3	5.3	17	24.3
Agree	3	5.3	16	22.9
Strongly agree	12	21.1	13	18.6
Total	57	100.0	70	100.0

7.9.23 Some 61.4% of hackney carriage drivers strongly disagreed that removing the limit on the number of hackney carriages in North Tyneside would benefit the public by reducing waiting times at ranks, compared to 20% of Private Hire respondents.

7.9.24 The following comments were recorded:

- 'Only at weekends'
- 'No waiting time at present'
- 'Would benefit customers'
- 'More people use private hire'

7.9.25 The third statement was ***'There are special circumstances in North Tyneside 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 North Tyneside that make the retention of the numerical limit essential'

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	**Percent**	**Frequency**	**Percent**
Strongly disagree	10	18.2	10	15.2
Disagree	5	9.1	9	13.6
Neither agree nor disagree	4	7.3	17	25.8
Agree	5	9.1	11	16.7
Strongly agree	31	56.4	19	28.8
Total	55	100.0	66	100.0

7.9.26 Some 65.5% of hackney carriage trade agree or strongly agree that there are special circumstances in North Tyneside that make the retention of the numerical limit essential, compared to 45.5% of the private hire trade.

7.9.27 The following comments were recorded:

- 'Not enough work'
- 'Not enough rank space'

7.9.28 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.

7.9.29 Some 60.7% of hackney carriage responses cited they would work more hours if the numerical limit of hackney carriages was removed. Some 47.5% of hackney responses stated that they would leave the trade if North Tyneside derestricted. In contrast 37.3% of private hire drivers said they would not change if the limit was removed, and 40.0% said they would work more hours.

7.9.30 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	8	13.1	28	37.3
I would expect to work more hours	37	60.7	30	40.0
I would expect to work fewer hours	3	4.9	7	9.3
I would acquire a hackney carriage licence	5	8.2	20	26.7
I would acquire multiple hackney carriage licences	6	9.8	2	2.7
I would switch from hackney to private hire	4	6.6	2	2.7
I would switch from private hire to hackney	3	4.9	14	18.7
I would leave the trade	29	47.5	10	13.3
Other	10	16.4	5	6.7

7.9.31 Key results from the Trade Survey can be summarised as;

Summary

Key findings from the survey can be summarised as follows:

- The majority of the hackney carriage trade and private hire trade thought training was not sufficient and English language training in particular was required.
- Majority of drivers sometimes feel unsafe whilst working in North Tyneside
- 85.5% of hackney carriage respondents stated that there was not sufficient rank space in North Tyneside
- 47.5% of hackney respondents stated that they would leave the trade should the authority de restrict.

8 Flagdown Survey

8.1 Introduction

8.1.1 In line with the report specification a series of surveys were undertaken to qualify the length of time it takes to flag down a taxi in North Tyneside. As detailed in the previous chapter only 4.0% obtained a taxi by on street flagdown for their last journey. However, all respondents obtaining a taxi in this way were satisfied with the amount of time it took them. To qualify this result a series of attempted flagdowns were made in North Tyneside to ascertain the ease of which to flag a hackney carriage.

8.1.2 These surveys were undertaken over a series of different time periods in early December. The observers noted down the number of available hackneys passing them and the length of time it took to obtain a vehicle by flagdown. Observers found alternative forms of transport if they were unable to obtain a taxi via flagdown after a 30 minute period.

8.1.3 The observers attempted to flag down a vehicle in areas of North Tyneside which respondents to the Public Attitude surveys highlighted as being problematic.

8.2 Results

8.2.1 A number of journeys were attempted during the day. Table 8.1 below documents the data obtained from the surveys.

Table 8.1: Flagdown Survey Data Weekday

	Start Location	End Location	Delay observed (mins)	Number of Passing Cabs	Successful Journey made by cab
1	Whitley Bay	Tynemouth	40	0	X
2	Tynemouth	North Shields	45	0	X
3	North Shields	Wallsend	30	0	✓
4	Wallsend	Central Station	:35	1	X

8.2.2 The observer waited for between 30 and 45 minutes to flagdown a taxi. Only one cab passed the observer whilst they were attempting to hire a taxi via flagdown. The observer was only successful in acquiring a Hackney Carriage in Journey 3; North Shields to Wallsend. In Wallsend, one cab passed the observer but was unable to take any fares due to being engaged on another job. At the other two locations, no hackney carriages were seen either passing by or at the ranks. Many private hire vehicles were observed throughout the day.

8.2.3 The taxi journey was rated on a number of criteria (see Table 8.2). For the journey between North Shields and Wallsend the divers' appearance was poor, consisting of tracksuit bottoms, trainers and a jumper. Both the inside and outside of the vehicle were clean. The driver was courteous and helpful; getting out of the car to help the observer with a suitcase. The driver also displayed good knowledge of the local area although took a phone call for a fare whilst driving.

Table 8.2: Assessed criteria

	Very Good	Good	Average	Poor	Very Poor
Driver Appearance				✓	
Condition of vehicle outside		✓			
Condition of vehicle inside	✓				
Helpfulness of driver		✓			
Driver knowledge	✓				

9 Disabled Access

9.1 Introduction

9.1.1 In line with a request from North Tyneside Council an assessment of the level of demand for disabled accessible vehicles is required.

9.2 Current Provision

9.2.1 North Tyneside Council currently licenses 100 wheelchair accessible taxis which are predominantly the Fiat Doblo type of vehicle. This equates to 49% of the fleet.

9.3 Consultation

9.3.1 During the rank observation programme thirteen wheelchair users were observed hiring a taxi. In total there were 6,889 observed passenger departures therefore wheelchair users equate to under 0.2% of departures at ranks. Wheelchair users were observed obtaining taxis at; Bedford Street North Shields (3); Metro Station North Shields (4); and Station Road Wallsend (6).

9.3.2 To engage with a range of disabled taxi users and non users, a focus group was held. A representative from the North Tyneside Coalition of Disabled People was the only group to attend. Feedback provided at this meeting highlighted that although there was a good percentage of wheelchair accessible vehicles available in theory, users found it very difficult in practice to obtain an accessible vehicle after 6pm. The group were in favour of a mixed fleet as disabled people have a range of needs but wanted to see more types of accessible vehicles licensed. Particular reference was made to the Mercedes Veto.

9.3.3 The representative had received anecdotal information from group members about drivers refusing to take wheelchair passengers, users being overcharged and drivers refusing to accept guide dogs. Users also stated that they did not feel safe using channel ramps to access vehicles.

9.3.4 Additional training was considered to be essential for all drivers, not just new drivers. It was felt that training should be more than disability awareness and should include passenger handling and customer service.

9.3.5 Consultation with a range of disability groups was also undertaken by letter. Responses to the written consultation were limited but highlighted that more accessible vehicles should be made available as it is often difficult to book one.

9.4 Latent demand

9.4.1 Some 549 on-street public interview surveys were carried out in November 2008. Of these respondents 47 (8.6%) stated that they considered themselves to have a mobility impairment. Of those using a taxi in the last three months (16), 5 people obtained their vehicle at a rank. The remaining 11 users booked their vehicle by telephone.

9.4.2 To provide evidence relating to suppressed demand in the event of a finding of significant patent unmet 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 North Tyneside in the last three months. Of those citing mobility impairment 3 of the respondents had given up waiting for a taxi by either rank or flag down, (6.4%). Some 7 respondents (14.9%) had given up by telephone. These levels are lower than those cited overall (see Figure 5.4) and by those without a mobility impairment.

9.5 Conclusions

9.5.1 The results of the consultation exercise appear to be mixed. It appears that although 49% of the fleet consists of accessible vehicles there is anecdotal evidence that passengers have difficulties obtaining accessible vehicles in the evening. However the results from the public attitude survey indicate mobility impaired passengers have given up waiting for a taxi less frequently than passengers with no mobility impairment.

9.5.2 It is apparent that disabled taxi customers would prefer to see a wider choice of vehicles available with full ramps and that for service levels to improve driver training must also be addressed.

10 Summary and Conclusions

10.1 Introduction

10.1.1 Halcrow has conducted a study of the hackney carriage market on behalf of North Tyneside Council.

10.1.2 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 North Tyneside;
- to recommend the increase in licences required to eliminate any significant unmet demand; and
- to assist the council in determining if there is any evidence that removal or changes to the limit on hackney carriage licences would result in a deterioration in the amount or quality of hackney carriage provision.

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

10.2 Significant Unmet Demand

10.2.1 The 2008 study has identified that there is NO evidence of significant unmet demand for hackney carriages in North Tyneside. 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.

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

- continue to limit the number of vehicles at 204;
- 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.

10.3 Is there any evidence that removal or changes to the limit on hackney carriage licences would result in deterioration in the numbers of hackney carriages?

10.3.1 Evidence from the Office of Fair Trading Taxi Market study published in 2007[2] found that removing the numerical limit on hackney carriages where numbers have previously been restricted resulted in additional vehicles. It identified the number of hackney carriages in newly de-restricted areas grew by around 30% between 2003 and 2007, while the number of hackney carriages in restricted authorities barely changed during the same period.

10.3.2 This is backed up though the results from the trade survey carried out in North Tyneside. In order to determine the likely effects of de restriction the trade were asked what effect they thought it would have on them. Based on these results some 50 responses indicated a desire to acquire a hackney licence and 33 indicated that they would either leave the trade or acquire a private hire plate, leaving a net gain of 17 hackney carriage plates.

10.3.3 De restriction or increasing the level at which the numerical limit is set could be of benefit to the consumer for a given level of fares, vehicle quality and driver quality. This benefit would be realised through lower delays in obtaining a vehicle. Average passenger delay at ranks across the week has been observed at 0.38 minutes in North Tyneside. This evidence suggests that, in practice, there would be little benefit to passengers through increasing the numbers of vehicles as the existing levels of delay is low.

10.3.4 De restriction would put additional pressure on the existing hackney carriage ranks. Evidence from elsewhere suggests that if rank capacity becomes constrained then an increase in cruising is likely to occur.[3] Increases in cruising provide additional amenity to passengers but may have adverse effects on traffic conditions at certain times of day, resulting in increases in vehicle emissions.

10.3.5 The licensing authority therefore needs to weigh up the benefit to the trade from continued restriction with the potential benefit to the public from removal of the restriction. The DfT guidance is clear on this matter, it recommends de-restriction.

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[2] See Office of Fair Trading, (2007), Evaluating the impact of the taxis market study, OFT956

[3] This behaviour was observed in Cambridge and Sheffield following de-restriction in work Halcrow conducted on behalf of the OFT. It was also observed in Bristol following de-restriction.

10.4 Is there any evidence that removal or changes to the limit on hackney carriage licences would result in deterioration in the quality of hackney carriages?

10.4.1 The trade survey sought views regarding the likely impact on a series of factors if North Tyneside Council were to remove the existing limit on hackney carriage licences. The results indicate the hackney carriage trade believe vehicle quality would deteriorate.

10.4.2 Vehicle standards are however regulated by the licensing authority. There is therefore no reason for vehicle quality to reduce if de restriction is accompanied by robust vehicle conditions to ensure standards for customers are maintained or improved. There may be a requirement for the authority to enhance its enforcement resources to guard against any reduction in service quality, especially where this might have an impact on passenger safety.

10.4.3 Evidence from the case studies in the Office of Fair Trading Taxi Market study found that customer's perceptions of the quality of taxi services in newly derestricted areas did not decrease as many had expected but largely remained unchanged.

10.5 Summary of Consultation – Interested Parties

10.5.1 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.

10.5.2 Stakeholders were generally happy with the numbers of hackney carriages but highlighted more wheelchair accessible vehicles should be available. Reference was made to the need to improve both driver and vehicle quality.

10.6 Summary of Consultation – General Public

10.6.1 Some 549 interviews were carried in November 2008. The key results are as follows:

- Some 70% of hirings are done by phone;
- High levels of satisfaction with delay on last trip;
- Some 17% of respondents had given up trying to obtain a vehicle by rank or flagdown;

- Some 33.7% of respondents felt that taxi services in North Tyneside could be improved (be made cheaper); and
- The majority of respondents felt safe using taxis during the day and night.

10.7 Summary of Consultation – Trade

10.7.1 Some 148 members of the trade responded to a trade survey. The key results are as follows:

- Majority of drivers sometimes feel unsafe whilst working in North Tyneside;
- The majority of the hackney carriage trade and private hire trade thought training was not sufficient and English language training in particular was required;
- 85.5% of hackney carriage respondents stated that there was not sufficient rank space in North Tyneside; and
- 47.5% of hackney respondents stated that they would leave the trade should the authority de restrict.

10.8 Conclusions

10.8.1 The 2008 study has identified that there is NO evidence of significant unmet demand for hackney carriages in North Tyneside. 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.

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

- continue to limit the number of vehicles at 204
- 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.