

Sunderland City Council
Hackney Carriage Demand Survey
Final Report
January 2009

Halcrow Group Limited

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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 Sunderland City Council (SCC) in pursuit of the following objectives:

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

1.1.2 In addition Sunderland City Council has requested that the study determines whether:

- It is in the interest of the travelling public in Sunderland for the council to continue to restrict hackney carriage numbers; and
- If so, should the authority:
 - Maintain the current limit of hackney carriage licences;
 - Grant a number of new licences to meet the unmet demand that may have been identified by the survey or
 - Grant a specific number of new hackney carriage licences each year.

1.1.3 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. Where restrictions are imposed, the Department urges that the matter is regularly reconsidered.

1.1.4 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:

'31. Most local licensing authorities do not impose quantity restrictions; the Department regards that as best practice. Where restrictions are imposed, the Department would urge that the matter should be regularly reconsidered. The Department further urges that

the issue to be addressed first in each reconsideration is whether the restrictions should continue at all. It is suggested that the matter should be approached in terms of the interests of the travelling public - that is to say, the people who use taxi services. What benefits or disadvantages arise for them as a result of the continuation of controls; and what benefits or disadvantages would result for the public if the controls were removed? Is there evidence that removal of the controls would result in deterioration in the amount or quality of taxi service provision'

2 Background

2.1 *General*

2.1.1 This section of the report provides a general background to the taxi market in Sunderland and the relevant legislation governing the market.

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.

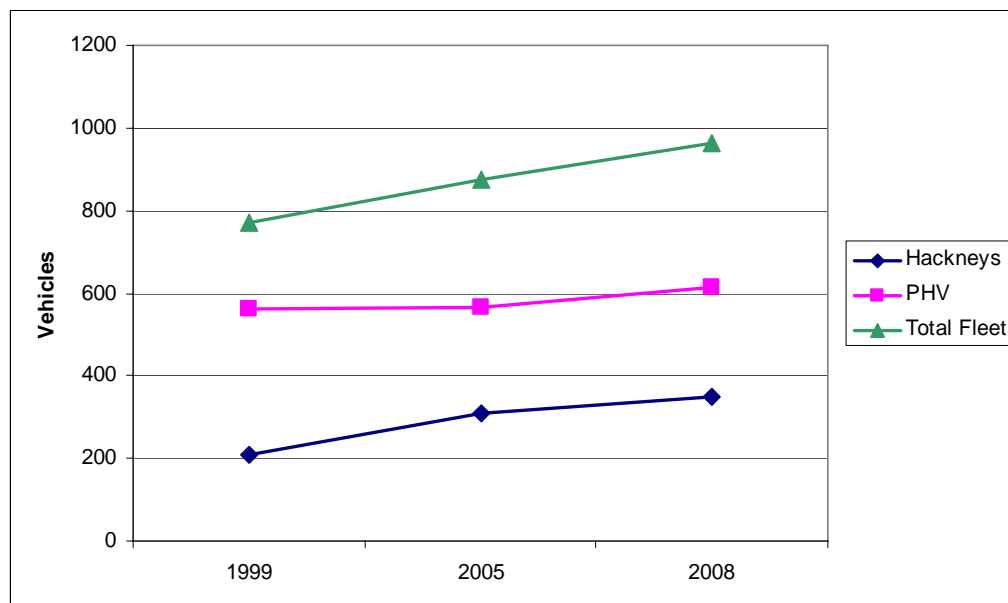
2.3 *City of Sunderland Overview*

2.3.1 Sunderland has a population of 280,807 people (Census 2001). Based on this population figure, there are 805 people per licensed hackney carriage in the licensing area as a whole. This compares favourably with other authorities with entry control.

2.4 *Background to the Hackney Carriage Market in Sunderland*

2.4.1 Sunderland operates under a two zone system. Zone one (the Sunderland zone) has a numerical limit of 284 Hackney Carriage Vehicle licences. Zone 2 (Hetton, Houghton, Washington zone) has a numerical limit of 65 Hackney Carriage vehicle licences. Figure 2.1 illustrates the trends in vehicle numbers since 1999.

Figure 2.1 Trends in Hackney Carriage and Private Hire Car Numbers (1999 - 2008)



2.4.2 Figure 2.1 illustrates that the total fleet has increased by 25% since 1999.

2.5 *Provision of Hackney Carriage Ranks*

2.5.1 There are currently 27 official ranks located in the Sunderland licensing district. A list of all these ranks is appended to the report.

2.5.2 Two areas in the city centre are served by taxi marshals. These are.

- West St rank; and
- Green Terrace Unofficial Rank.

2.5.3 Plate 1 pictures the Park Lane rank.

Plate 1 Park Lane Rank



2.6

Hackney Carriage Fares and Licence Premiums

2.6.1

Hackney carriage fares are regulated by the Local Authority. There are three standard tariffs. Tariff 1 operates 7am-11pm Monday to Saturday and Tariff 2 operates Monday to Saturday 11pm – 7am and all day Sunday. Tariff 3 operates from 6pm on Christmas Eve to 7am on the 27th December and from 6.00 pm on 31st December to 7.00 am on 2nd January and all day on other Public and Bank Holidays. There are also a series of extra charges for waiting time and luggage.

2.6.2

Table 2.2 outlines the fare structure in more detail.

Table 2.2 Sunderland Hackney Carriage Fare Tariff December 2008

	Price
Tariff 1 First 170 yds (155.45 metres) Each extra 280 yds (256.03m), or part of	£2.40 20p
Tariff 2 First 170yds (155.45m) Each extra 220 yds (201.17m), or part of	£2.80 20p
Tariff 3 First 170yds (155.45m) Each extra 220 yds (201.17m), or part of	£3.80 20p
Waiting Time (initial free waiting time 126 seconds) For each period of 60 seconds	20p
Extra Charges For each adult in excess of 2 in number For each article of luggage (wheelchair and pushchairs free of charge) Each dog or other animal (except assistance dogs accompanied by their owner) For the summoning of a vehicle where the hirer has been informed of the charge Fouling Charge	20p 10p 10p 60p £30.00

Source: Sunderland City Council – amended December 2008

2.6.3 Where local hackney carriage markets are subject to both price and entry regulation, it has commonly been the case that a premium accrues to the ownership of the vehicle licence. This premium is unknown as the Authority is unable, legally to regulate the sale of vehicle licences.

2.6.4 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 Sunderland 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.

2.6.5

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.

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 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 measure¹.

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.

¹ The cut off was devised without reference to latent demand as defined in 3.4.5. The inclusion of the LDF factor makes it much more likely that a finding of significant unmet demand will be reached.

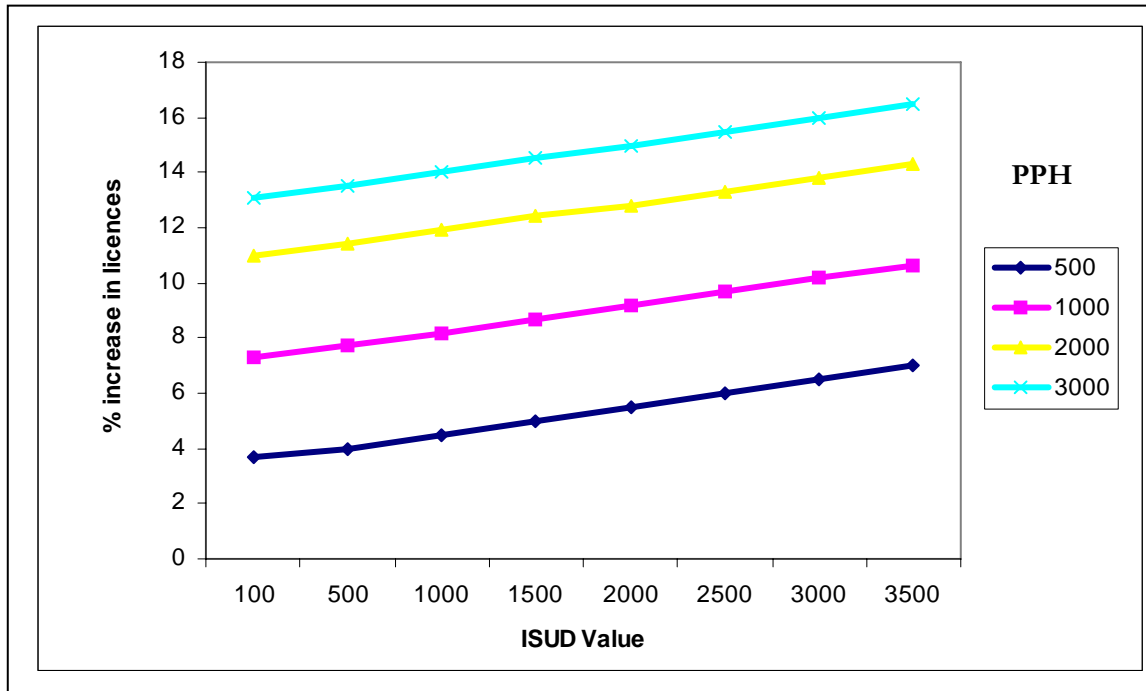
3.5.2 SUDSIM represents a synthesis of a queue simulation work that was previously used (1989 to 2002) to predict the alleviation of significant unmet demand and the ISUD factor described above (hence the term SUDSIM). The benefit of this approach is that it provides a direct relationship between the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

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

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, exp p Bunch 1989². This case set the precedent that it is only those services that are exclusive to hackney

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

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.

4 Evidence of Patent Unmet Demand – Rank Observation Results *Sunderland zone*

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 140 hours. During the hours observed some 10,976 passengers and 7,476 cab departures were recorded. 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 43% of the hours observed while excess demand (queues of passengers) was experienced in 9% of hours. Conditions are most favourable to customers during the Sunday day. Conditions were least favourable to customers on weekend night periods.

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

Period		Excess Demand	Equilibrium	Excess Supply
Weekday	Day	4	30	65
	Night	3	40	58
Weekend	Day	4	63	33
	Night	24	49	27
Sunday	Day	0	75	25
All 2008		9	48	43

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 the Sunderland zone and for the zone as a whole (Table 4.2).

4.3.2 The survey suggests some 10,976 passenger departures occur per week from ranks in Sunderland involving some 7,476 cab departures.

4.3.3 The taxi trade is somewhat concentrated at Green Terrace (unofficial), accounting for 44% of the total. On average, passengers wait 0.23 minutes for a cab. At Green Terrace rank passengers wait an average of 2.9 minutes.

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

Rank	Passenger Departures	Cab Departures	Average Passenger Delay	Average Cab Delay
Athenaeum Street	2,397	1,434	0.00	38.18
Union Street	705	475	0.91	23.14
Park Lane	1,270	1,244	0.03	31.67
West Street	293	302	0.08	29.10
Park Lane (Chase)	1,535	1,203	1.20	8.14
Green Terrace (unofficial)	4,777	2,817	2.90	5.85
Total	10,976	7,476	0.23	18.76

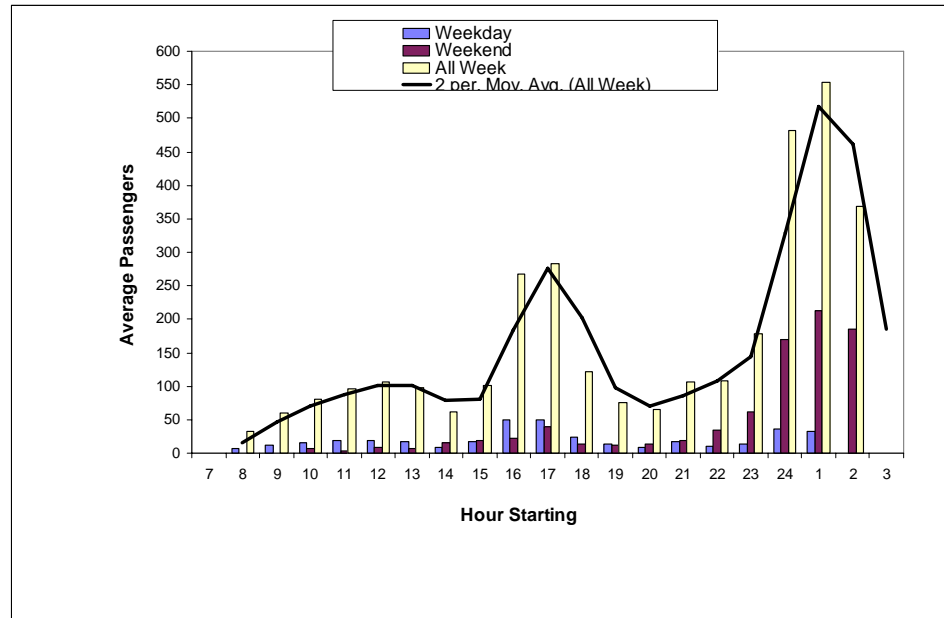
4.4

The Delay/Demand Profile

4.4.1

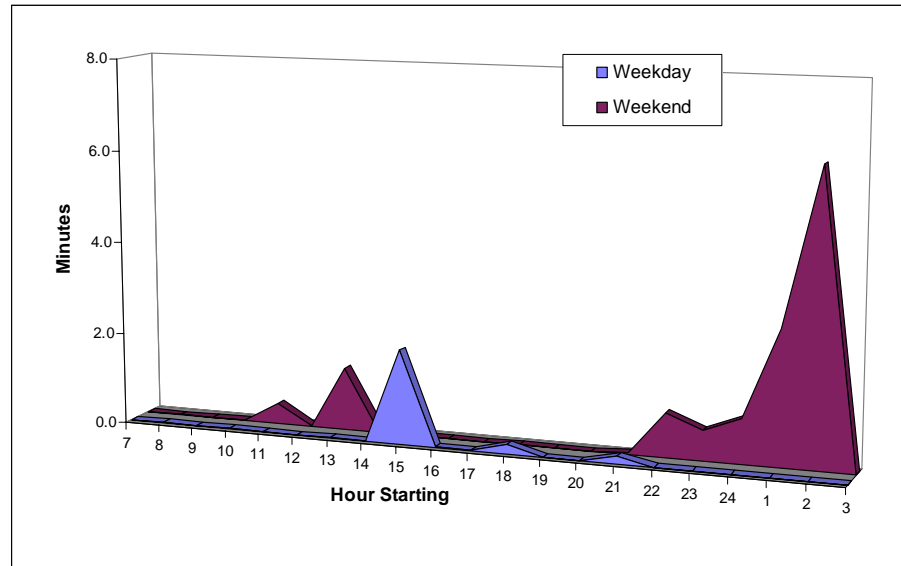
Figure 4.1 provides a graphical illustration of passenger demand for the Monday to Saturday period between the hours of 09:00 and 04:00.

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 Chapter 7 and 8).
- 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 directly be the 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 findings occurred in Bristol. 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 result in 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 at weekend nights between 2400 and 0400 and between 1100 and 1400 during weekend daytimes. The level of passenger delay can peak to six minutes on weekend nights. For all other times of day the level of passenger delay is generally less than two minutes.

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



4.5

The Effective Supply of Vehicles

4.5.1

Observers were required to record the hackney carriage licence plate number of vehicles departing from ranks. In this way we are able to ascertain the proportion of the fleet that was operating during the survey.

4.5.2

During the daytime period (0700 to 1800) some 150 (53%) of the hackney fleet were observed at least once during the period of the study. During the evening/nighttime period (1800 to 0700) some 256 (90%) of the hackney fleet were also observed at least once during the period of the study. Between 0000 and 0400 some 48% of the fleet were observed.

5 Evidence of Patent Unmet Demand – Rank Observation Results *Washington, Hetton, Houghton zone*

5.1 *Introduction*

5.1.1 This section of the report highlights the results of the rank observation survey. The rank observation programme covered a period of 66 hours. During the hours observed some 3,672 passengers and 2,868 cab departures were recorded. A summary of the rank observation programme is provided in Appendix 2.

5.1.2 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.

5.2 *The Balance of Supply and Demand*

5.2.1 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 26% of the hours observed while excess demand (queues of passengers) was experienced in 3% of hours. Conditions are most favourable to customers during the weekday night and weekend night. Conditions were least favourable to customers on weekend day and weekday day periods.

Table 4.1 The Balance of Supply and Demand in the Washington, Hetton and Houghton zone Rank-Based Hackney Carriage Market (Percentages – Rows Sum to 100)

Period		Excess Demand	Equilibrium	Excess Supply
Weekday	Day	6	38	56
	Night	0	100	0
Weekend	Day	6	88	6
	Night	0	62	38
Sunday	Day	0	75	25
All 2008		3	71	26

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

5.3 Average Delays and Total Demand

5.3.1 The following estimates of average delays and throughput were produced for each of the main ranks in the Washington, Hetton and Houghton zone and for the zone as a whole (Table 4.2).

5.3.2 The survey suggests some 3,672 passenger departures occur per week from ranks in the Washington zone involving some 2,868 cab departures.

5.3.3 The taxi trade is somewhat concentrated at the Asda rank, accounting for 72% of the total. On average, passengers wait 0.12 minutes for a cab.

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

Rank	Passenger Departures	Cab Departures	Average Passenger Delay	Average Cab Delay
Spout Lane	86	77	0.00	13.02
Riverside (unofficial)	62	29	0.00	186.32
In Shops (Washington)	876	754	0.48	17.44
Asda	2,648	2,008	0.00	11.95
Total	3,672	2,868	0.12	15.16

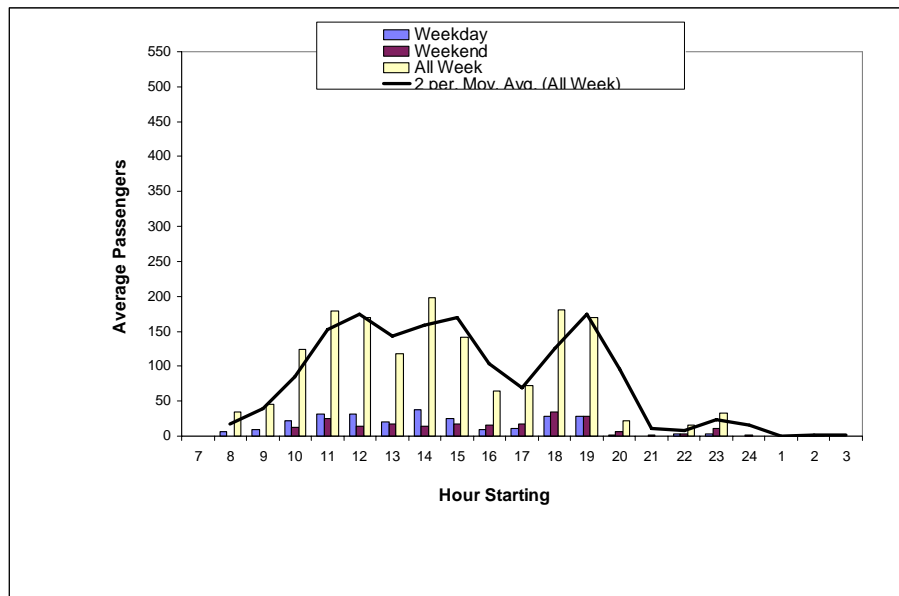
5.4

The Delay/Demand Profile

5.4.1

Figure 4.1 provides a graphical illustration of passenger demand for the Monday to Saturday period between the hours of 09:00 and 04:00.

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



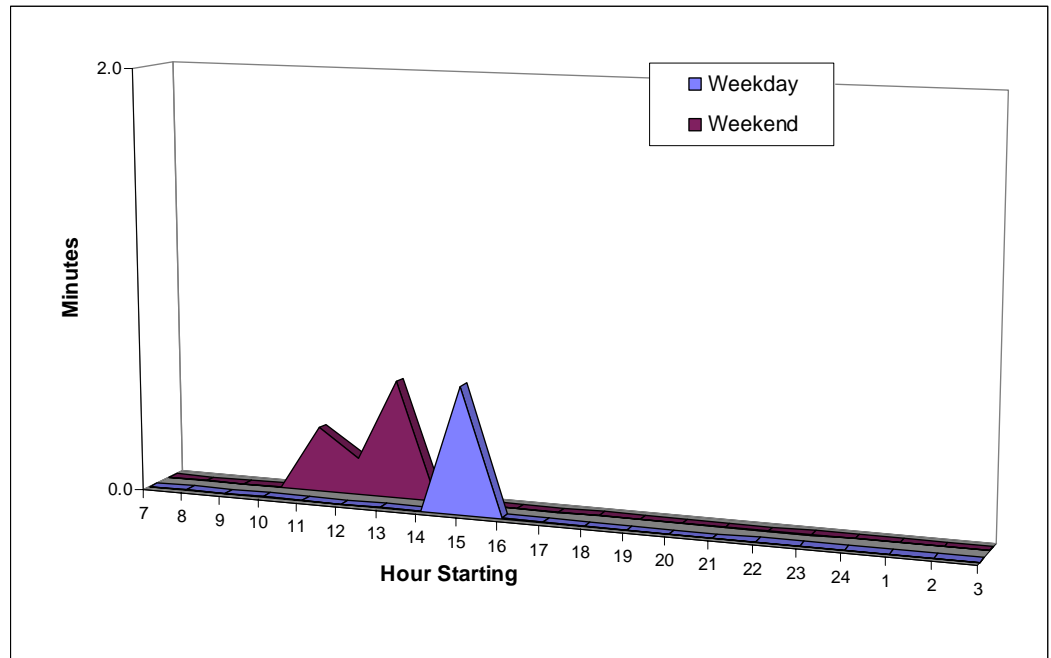
5.4.2

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. This has implications for the interpretation of the results (see section 4.7 below).

5.4.3

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 at weekend days between 1400 and 1600 and between 1100 and 1400 during weekend daytimes. The level of passenger delay can peak to six minutes on weekend nights. For all other times of day the level of passenger delay is generally less than one minute.

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



5.5

The Effective Supply of Vehicles

5.5.1

Observers were required to record the hackney carriage licence plate number of vehicles departing from ranks. In this way we are able to ascertain the proportion of the fleet that was operating during the survey.

5.5.2

During the daytime period (0700 to 1800) some 37 (57%) of the hackney fleet were observed at least once during the period of the study. During the evening/nighttime period (1800 to 0700) some 54 (83%) of the hackney fleet were also observed at least once during the period of the study. Between 0000 and 0400 some 48% of the fleet were observed.

6 Evidence of Suppressed Demand - Public Attitude Pedestrian Survey Results – Zone 1 and Zone 2

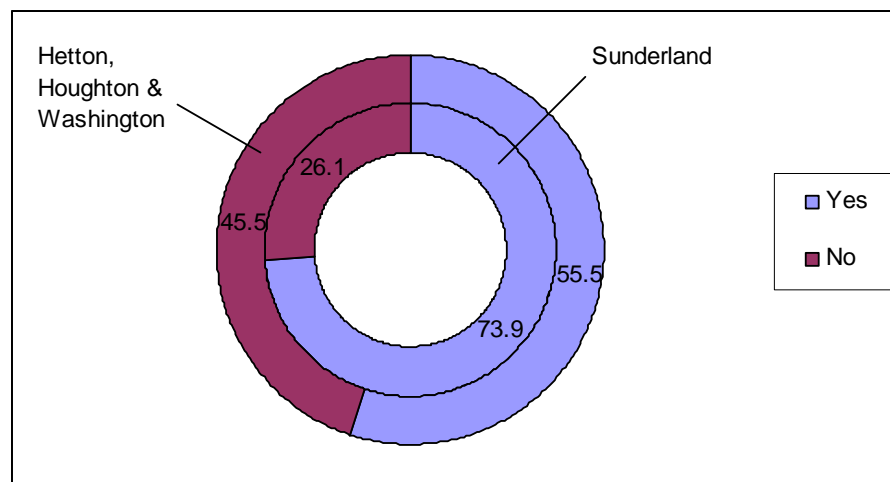
6.1 Introduction

6.1.1 Some 559 on-street public interview surveys were carried out in November and December 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.

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

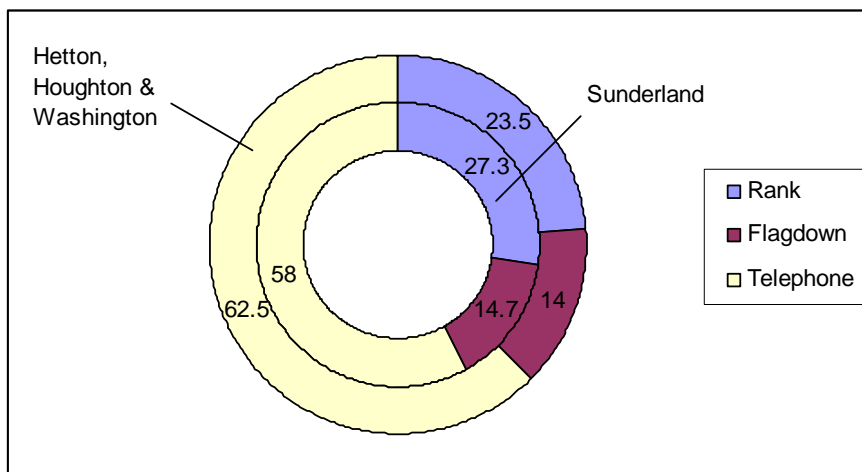
6.1.3 The survey found that 73.9% of respondents in Sunderland and 55.5% of respondents in Hetton, Houghton & Washington had used a taxi within this period. The results are displayed in Figure 6.1

Figure 6.1 Made a trip by taxi in the last 3 months (percentages)



6.1.4 Trip makers were asked how they obtained their taxi. Over half of hirings from both areas were achieved by telephone with 58.0% of trip makers in Sunderland and 62.5% of trip makers in Hetton, Houghton & Washington giving this answer. Some 27.3% of trip makers in Sunderland and 23.5% in Hetton, Houghton & Washington obtained a taxi at a rank. Figure 6.2 reveals the pattern of taxi hire.

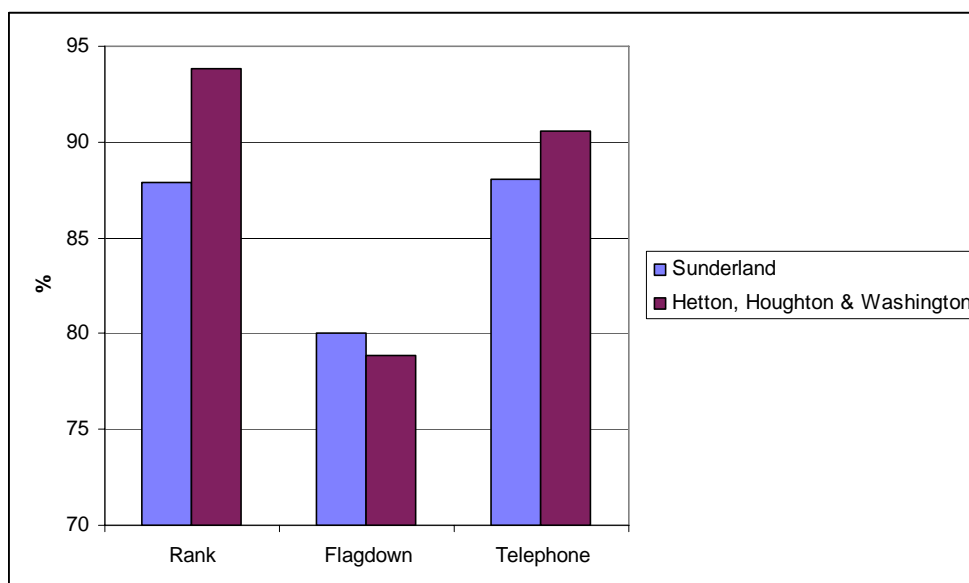
Figure 6.2 Method of Hire for Last Trip (percentages)



6.1.5

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 their last taxi journey with 86.6% of respondents in Sunderland and 89.7% of respondents in Hetton, Houghton & Washington giving a positive answer. Figure 6.3 shows that for each method of obtaining a taxi, the majority were satisfied with the service. Flagdown provided the lowest level of satisfaction.

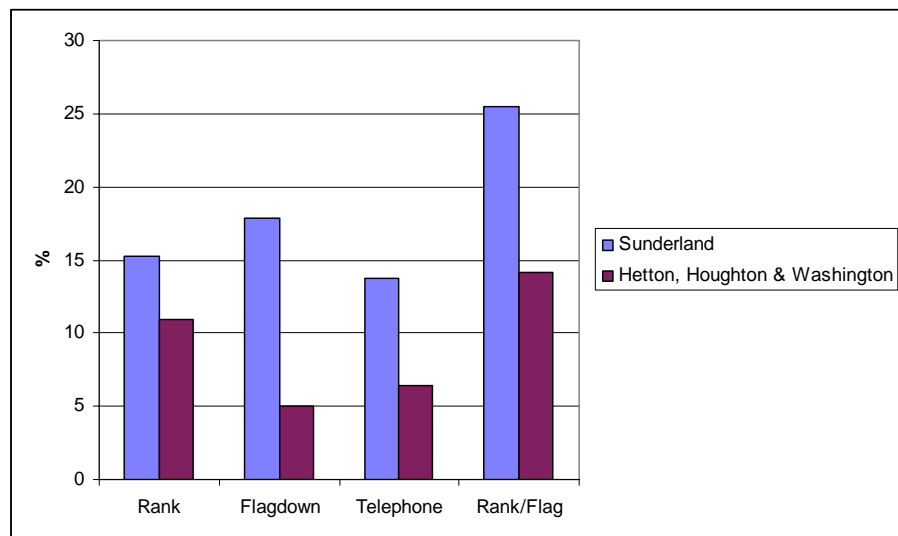
Figure 6.3 Satisfaction with Delay on Last Trip by Method of Hire



6.1.6

In order to measure demand suppression, 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 the district in the last three months. The results are documented in figure 6.4.

Figure 6.4 Latent demand by method of hire – Proportion giving up trying to obtain a hackney in last 3 months



6.1.7

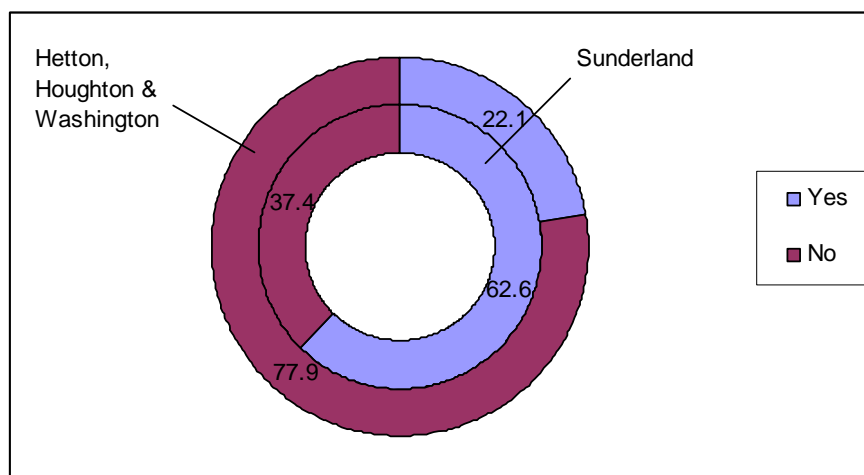
Figure 6.4 highlights that 25.5% of respondents in Sunderland zone had given up trying to obtain a taxi at a rank or by flagdown compared to 14.1% in the Washington zone. Those respondents who had given up waiting for a taxi where asked within which area of Sunderland they were waiting. The most popular answers were:

- City Centre;
- Chester Road;
- Park Lane;
- Washington;
- Glass Spider;
- Houghton; and
- Hetton.

6.1.8

Respondents were asked if they thought the taxi service in Sunderland or Hetton, Houghton or Washington could be improved. The responses indicate that the majority of respondents in Sunderland (62.6%) thought that taxi services could be improved compared with 22.1% of respondents in Hetton, Houghton & Washington. The results are documented in figure 6.5.

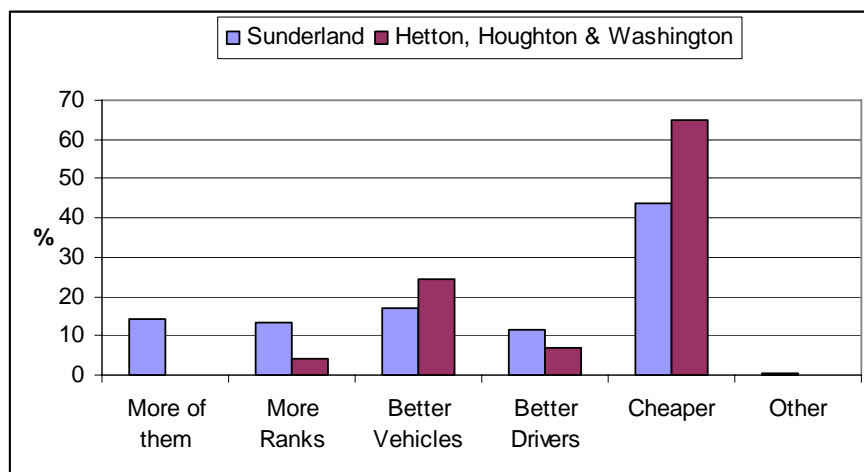
Figure 6.5 Could taxi services be improved?



6.1.9

Those who considered that taxi services needed improvement were asked how they could be improved. Figure 6.6 documents the range of potential improvements.

Figure 6.6 How could taxi services be improved (multiple responses)?



6.1.10

Some 43.6% of respondents stated that taxis in Sunderland could be improved if they were made cheaper with 64.8% of respondents stating that taxis in Hetton, Houghton & Washington could also be improved if they were made cheaper. Some 24.3% of Hetton, Houghton & Washington respondents stated that there was a need for better vehicles as

did 17.1% of Sunderland respondents. Some 14.2% of Sunderland respondents felt that there was a need for more taxis and 13.5% a need for more ranks.

6.2

Safety & Security

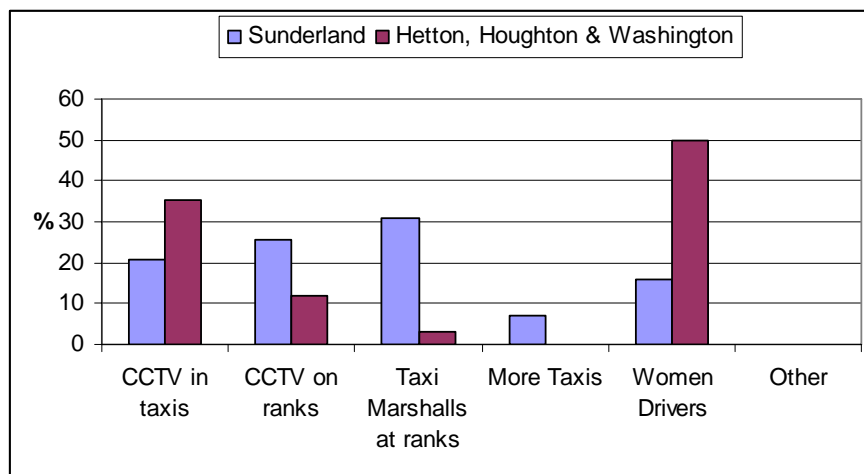
6.2.1

Respondents were asked whether they felt safe when using taxis in the Sunderland area. The majority of respondents felt safe using taxis during the day (91.8% in Sunderland and 100% in Hetton, Houghton and Washington); however some 31.4% of Sunderland respondents and 8.2% of Hetton, Houghton & Washington respondents stated that they felt unsafe using taxis at night in the corresponding areas.

6.2.2

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 the Sunderland area. Some 20.8% of responses in Sunderland and 35.3% of responses in Hetton, Houghton & Washington stated that CCTV in taxis would improve safety when using taxis in the Sunderland area. In comparison 25.7% of respondents in Sunderland would feel safer if CCTV were introduced at ranks and 30.8% if taxi marshals were introduced. Half of respondents in Hetton, Houghton & Washington felt that women taxi drivers would improve safety compared with 15.8% of respondents in Sunderland. The results are shown in figure 6.7.

Figure 6.7 Improvements to safety and security when using taxis in Sunderland, Washington, Hetton and Houghton (multiple responses)



6.3

Ranks

6.3.1

Respondents were asked if there were any locations where they would like to see a new rank. Some 19.3% of Sunderland respondents were of the opinion that new ranks were required in Sunderland compared with just 1.3% in Hetton, Houghton & Washington.

Those individuals who stated they would like to see a new rank were subsequently asked to provide a location. The most popular locations were the city centre; Doxford Park; Asda; Metro Stations; all supermarkets; and Chester Road.

Summary

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

- The majority of hirings are by telephone;
- High levels of satisfaction with delay on last trip – Flagdown hirings provide the lowest level of satisfaction in both zones;
- Some 12.8% of respondents had given up trying to obtain a vehicle by rank or flagdown in Sunderland and 5.5% in Hetton, Houghton & Washington;
- Some 62.6% of respondents feel that taxi services in Sunderland and 22.1% in Hetton, Houghton & Washington could be improved (need to be cheaper); and
- Majority of respondents felt safe using taxis during the day and night in both zones.

7 Deriving the Significant Unmet Demand Index Value

7.1 *Introduction*

7.1.1 The data provided in the previous chapters can be summarised using Halcrow's ISUD factor described in Section 2.

7.2 *Sunderland Zone – Zone 1*

7.2.1 The component parts of the index, their source and their values are given below:

Average Passenger Delay (Table 4.2)	0.23
Peak Factor (Figure 4.1)	0.5
General Incidence of Delay (Table 4.4)	13
Steady State Performance (Table 4.1)	4
Seasonality Factor (paragraph 3.4.5)	1
Latent Demand Factor (paragraph 6.5.2)	1.25
ISUD (0.23*0.5*13*4*1.25)	8

7.2.2 The cut off level for a significant unmet demand is 80. It is clear that the Sunderland zone is below this cut off point, indicating that there is NO significant unmet demand. This conclusion covers both patent and latent/suppressed demand.

7.3 *Washington, Hetton and Houghton Zone – Zone 2*

7.3.1 The component parts of the index, their source and their values are given below:

Average Passenger Delay (Table 5.2)	0.12
Peak Factor (Figure 5.1)	1
General Incidence of Delay (Table 5.4)	1
Steady State Performance (Table 5.1)	6
Seasonality Factor (paragraph 3.4.5)	1
Latent Demand Factor (paragraph 6.5.2)	1.14
ISUD (0.12*1*1*6*1*1.14)	1

7.3.2

The cut off level for a significant unmet demand is 80. It is clear that the Washington, Hetton and Houghton zone is below this cut off point, indicating that there is **NO significant unmet demand**. This conclusion covers both patent and latent/suppressed demand.

8 Consultation

8.1

Introduction

8.1.1

Guidelines issued by the Department for Transport state that consultation should be undertaken with the following organisations and stakeholders:

- 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 providers and transport managers.

8.2

Direct Consultation

8.2.1

A number of organisations were given the opportunity to attend a meeting to discuss a series of issues regarding the taxi market in Sunderland. Separate meetings were organised with the following:

- Hackney Carriage Trade Representatives;
- Private Hire Trade Representatives;
- Planning, Regeneration, Town Management and Tourism council representatives
- Police; and
- Disability Representatives.

8.2.2

The comments from those attending the organised meetings are summarised below and appended in full in Appendix 4.

Hackney Carriage Trade Representatives

8.2.3

Regarding adequacy of provision the hackney trade representatives felt that there were too many licences in both zones and that the current numerical limit should either be maintained or reduced. It was commented upon that Sunderland is shrinking and no longer attracting as many people to the city centre, therefore with less people there is no need for extra taxis. It was considered that the only busy night is a Saturday night and Sunderland has a one night economy. Those representatives from the Washington area commented how most of their work is outward journeys to surrounding areas of

Sunderland such as Newcastle etc, and there is no real night time economy in Washington.

- 8.2.4 The trade is against derestriction. More taxis would lead to a greater number of people using radio circuits and therefore less people using the ranks.
- 8.2.5 Other issues raised during the consultation included concern over the current financial climate and that this will have an adverse effect on earnings for the next one to three years.
- 8.2.6 The Washington representatives stated that an increase in taxi licences would force some people in the area out of business. Both trades felt that the current fleet is adequate and an increase in vehicle numbers would lead to a decrease in the vehicle quality. Should the authority de restrict the representatives felt that this would also lead to many vehicles only operating part time, and doing so at the busy night time periods whilst working another different job during the day. This could lead some current full time workers into being forced to do the same and operate only a certain times whilst getting another job, in order to maintain a living, leading to an overall less extensive coverage during certain periods of the day.
- 8.2.7 The trade felt that enforcement within Sunderland was insufficient and this was due to a lack of resources. The Green Terrace rank was commented upon as it is not an official rank yet has taxi marshals in place, whilst the official Park Lane rank is un-marshalled as there is no CCTV and deemed unsafe for marshals to work.
- 8.2.8 Regarding rank locations and adequacy the representatives from the Washington area commented that some ranks are badly marked, the rank at The Village being one instance. There are 2 official night ranks within Washington and one unofficial rank at the Riverside. The Washington representatives felt that the Riverside should be made into an official rank, however, this has previously been opposed by the traffic department who argue that the road is not wide enough.
- 8.2.9 The representatives from Washington suggested that Zone 2 taxis should be allowed to ply for hire via flagdown only (not on ranks) in zone 1 during the busy night time hours (e.g. between midnight and 4 or 6am). This would reduce their dead mileage by allowing return journeys following a drop off in zone 1 and also extend the night time working hours. It was suggested this should also be allowed to work vice versa for those holding zone 1 licences. This suggestion was only supported by the Washington trade association.

- 8.2.10* Regarding the zoning system in place in Sunderland, some members felt that it should be one zone but the two sets of plates maintained. The Sunderland associations commented that the area should either be completely zoned (i.e. not incorporating the above suggestion around certain working hours), or not zoned at all.
- 8.2.11* Herrington Country Park was one suggestion for a possible new rank location, if this is going to be promoted as a venue for big events (previously hosted Radio 1's big weekend), then taxis will require knowledge of this and access to the park, this has not been the case in the past. A second suggested was outside Cuchinis on Vine Place. The trade commented that consultation with the planning department on issues of new ranks can sometimes be difficult due to resources.
- 8.2.12* Taxi access around Sunderland was discussed and the trade suggested that the use of bus lanes within the city would be beneficial.
- 8.2.13* Regarding safety Park Lane was cited as an area that often has fights at the weekend, and is an area with no CCTV. In cases where marshals have been employed they do make the area safer and keep people calmer whilst waiting for transport home. The final comment regarding safety was that the police are not always much help as they do not prosecute matters such as non-paying fares.
- 8.2.14* Regarding quality of drivers and vehicles the trade said comments from those visiting the city have indicated that the vehicle quality and standard is good. They felt that the age restriction in place for hackney licences is of benefit because it maintains these high standards, and as a result Sunderland has a fairly new fleet of taxis. .
- 8.2.15* Currently all new hackney vehicles are required to be wheelchair accessible. It was felt that this is not always necessary, especially in Washington as there are already enough vehicles of this kind. Comments were also made saying that some disabled people prefer to travel in saloon cars.
- 8.2.16* The hackney trade representatives felt that there was no real need for any extra training for drivers as experience was gained 'on the job'. It was noted that those using wheelchair accessible vehicles should know what they are doing and how to operate them correctly.
- 8.2.17* The Washington representatives commented that despite there being a zoning system where they can only operate within one area, the basic knowledge test covers both areas and is such unnecessary. Both associations agreed that a basic knowledge of

both zones was necessary, but only a more detailed knowledge should be required for the zone in which they work.

8.2.18 Both associations felt that more signage of ranks is needed.

Private Hire Trade Representatives

8.2.19 Regarding the adequacy of taxi provision the private hire representatives felt there is no overall unmet demand within Sunderland, except at certain times late at night. They felt that the private hire fleet could be used more effectively and could be better utilised at peak times as and when required, e.g. through the use of mobile booking stations in the town centre, Green Terrace is one of the areas in which this would be useful.

8.2.20 The private hire representatives said that the public are not always able to get wheelchair accessible vehicles, especially for example at the train station. As well as this they felt that hackney carriage drivers do not always want to pick up disabled passengers as this is more time consuming than other fares.

8.2.21 Overall the private hire trade felt there are enough vehicles at this time.

8.2.22 When questioned about the image of the trade the representatives felt that all cars are of a good standard and quality.

8.2.23 Regarding training PATS (Passenger Assistant Training Scheme) training was suggested as a good idea and is currently part of some private hire company contracts. If training were to become compulsory the representatives felt it would be best to introduce this for new drivers, or those getting a hackney plate for the first time. Alongside this customers need education on the use of certain vehicles, for instance not using prams in wheelchair accessible vehicles, as they are not designed to be clamped down in this manner. Training for those using wheelchair accessible vehicles is especially important to ensure the vehicle and any equipment is used correctly and passengers are transported safely.

Police

8.2.24 Regarding adequacy of taxi provision the Police felt that there are currently a sufficient number of taxis and there doesn't appear to be a shortage. The introduction of taxi marshals such as at Green Terrace has reduced disorder in the busy areas.

8.2.25 The Police felt there was no need to remove the numerical limit as no more taxis are needed. Alongside this in Green Terrace taxis cause a traffic obstruction due to a lack of rank space, more taxis would only increase this congestion.

8.2.26 Overall it was felt that the majority of drivers are of good quality and the police receive very few complaints. The vehicles are well maintained and the drivers occupying them are generally well presented and polite.

8.2.27 The police commented that many members of the public have no knowledge of the difference between private hire vehicles and hackney carriages.

8.3 *Indirect Consultation*

8.3.1 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.

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

- Sunderland City 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.

8.4 *Comments Received*

8.4.1 The comments received are summarised below and appended in full to this report.

8.4.2 The Sunderland Residents Federation provided a written response. The association felt that there was an adequate supply of hackneys and private hires across Sunderland at all times of the day. However they felt that additional wheelchair accessible vehicles were required.

8.4.3 The association considered vehicle and driver quality to be good.

8.4.4 With regard to ranks the association stated that they wished to see additional ranks at railway stations and that all ranks should have shelters.

- 8.4.5 Following the recent fare increase fares were felt to be unfair.
- 8.4.6 The association thought that taxi marshals were a good effective idea.
- 8.4.7 Children's Services (SCC) provided a written response. Vehicles were considered to be of a high standard and most were considered to be fairly new. Most drivers were considered to be friendly – responses from parents concurred with this. With regard to accessible vehicles it was noted that sometimes it was difficult to track down vehicles suitable for larger wheelchairs.
- 8.4.8 Sunderland Carers' Centre in their written response considered that there are a reasonable number of wheelchair accessible taxis but every effort should be made to ensure the majority of taxis come up to this standard. Similarly most taxi drivers appear to be helpful to people with disabilities. The biggest issue for people with disabilities and their carers relates to cost. For many of these buses do not offer a suitable alternative so they use taxis more than most. The cumulative cost is therefore considerable. Voucher schemes etc. do not seem to have worked as taxis appear to prioritise other bookings over those using a voucher or similar. Given the problems with public transport it would be beneficial if there was a subsidised taxi scheme which worked for frequent users who were frail or disabled and their carers.
- 8.4.9 Sunderland CC's Transportation Team responded to the consultation. The department made reference to a study commissioned by the Tyne and Wear Transport team regarding the role of taxis in Tyne and Wear. It was felt that the existing ranks are generally located in central areas or near to shopping parades, where pedestrian access is readily available.
- 8.4.10 The Community Safety Officer felt that the provision of sufficient taxis (hackney and private hire) is important in tackling late night violence by quickly dispersing the public during late night hours. The locations of ranks have been an issue for discussion between the Police and partners in the Safer Sunderland Partnership 'Local Multi Agency Problem Solving Group' for the City Centre for a number of years. However at the present time there are no live discussions involving the police regarding a change of ranks.
- 8.4.11 In general terms, the Safer Sunderland Partnership through its close liaison with the Police and other partners has used the 'Taxi Marshal' process for a number of years. Initially the project was operated by Police Officers, but over the last 12 months, marshalling has been carried out by a SIA approved company under contract to the

City Council. Northumbria Police are enthusiastic about the success of the project as it releases officers for mainstream policing and positive comments have been made.

9 Trade Survey

9.1 *Introduction*

9.1.1 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.

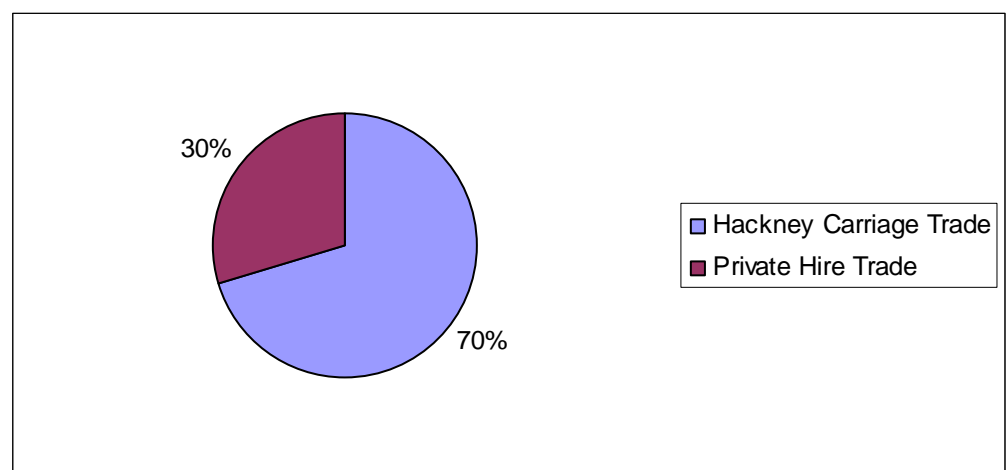
9.2 *Survey Administration*

9.2.1 The survey was conducted through a self completion questionnaire. These were sent to all 1,300 licensed public and private hire drivers and operators in Sunderland. A total of 260 questionnaire forms were completed and returned, giving a response rate of 20%, 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.

9.3 *General Operational Issues*

9.3.1 The responses provided have been disaggregated on a hackney carriage and private hire trade as shown in Figure 9.1 below.

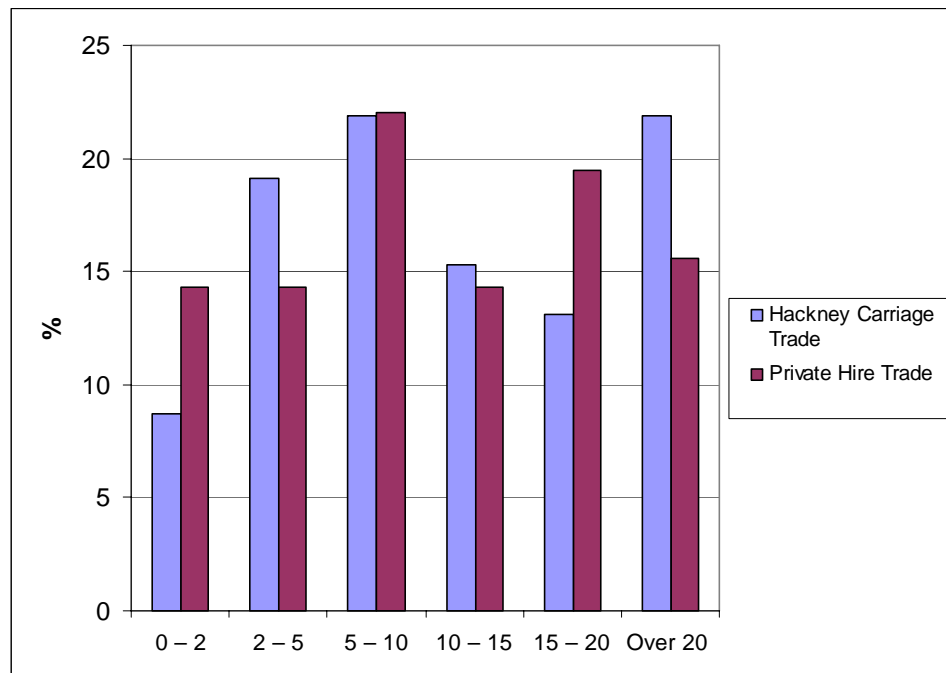
Figure 9.1 Breakdown of Responses between Trades



9.3.2

Figure 9.2 indicates that 50.3% of hackney carriage respondents have been involved in the Sunderland taxi trade for over 10 years as have 49.4% of the private hire trade.

Figure 9.2 Duration of the respondents involvement in the hackney carriage trade/private hire trade.



9.4

Driving

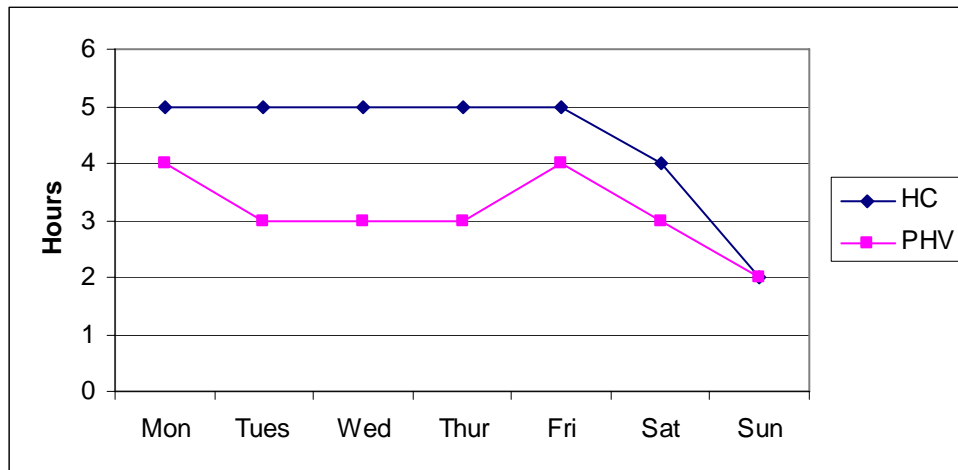
9.4.1

Respondents were asked the average number of hours they worked in a typical week. Hackney drivers tended to work on average nearly 9 hours more a week than Private hire drivers. Hackney trade respondents worked on average for 52 hours per week compared to 43 hours per week for private hire drivers.

9.4.2

Respondents were asked to state how many hours they worked at different times of day during a typical week. Figure 9.3 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 for more hours during the daytime to the private hire drivers. It also shows that both trades tend to work less hours during the day on the weekends than during the weekdays.

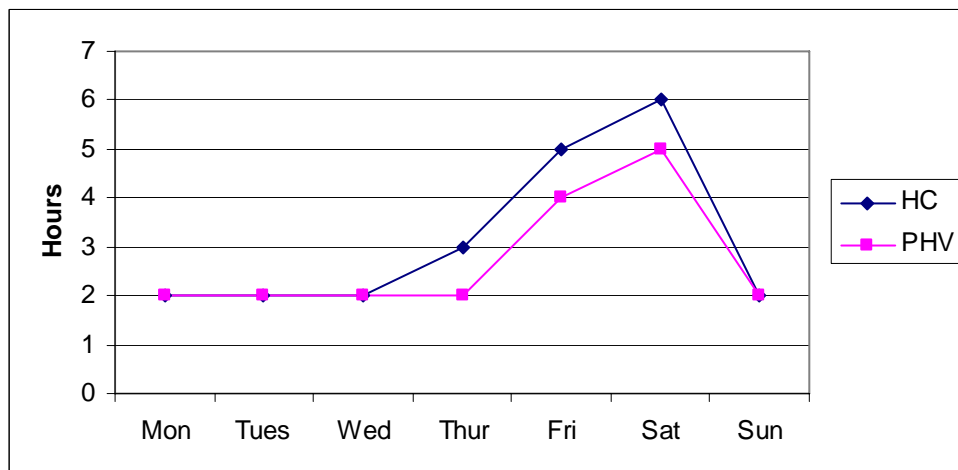
Figure 9.3 Average daytime hours worked



9.4.3

Figure 9.4 shows the average number of hours worked during the evening/night period (18:00-06:00). During the night time period the hackney carriage trade work, on average, longer hours than the private hire drivers. It also shows that both trades work for longer hours on a Thursday, Friday and Saturday night compared with other nights during the week.

Figure 9.4 Average night time hours worked



9.4.4

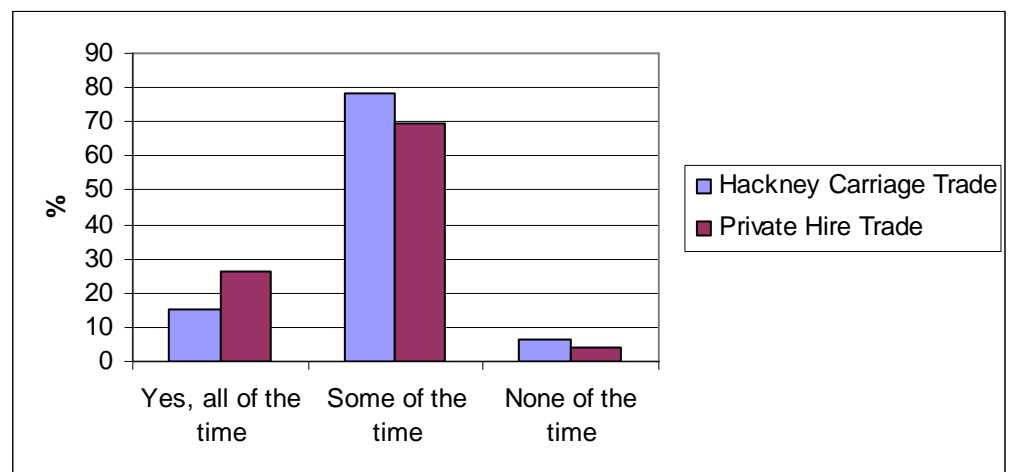
The trade were asked whether the Licensing Act 2003 had had an effect on their typical working week. Some 36.9% of hackney carriage respondents stated that it had not had an effect compared to 50% of private hire respondents.

9.4.5 Respondents were asked to state the number of times they carry disabled passengers on a weekly basis. Some 36.5% of hackney carriage respondents and 56.6% of private hire respondents were typically more likely to carry between one and five disabled persons per week.

9.5 *Safety & Security*

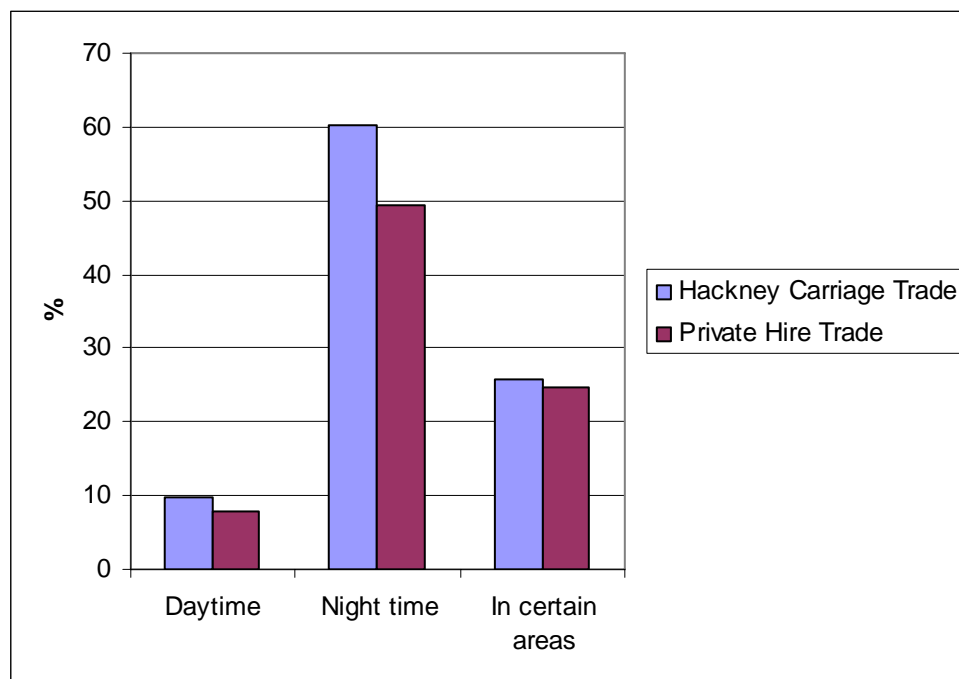
9.5.1 The respondents were asked if they felt safe whilst working as a taxi driver in Sunderland, the results of which are shown below in figure 9.5. The majority of hackney carriage respondents stated that they felt safe some of the time (78.1%).

Figure 9.5 Do you feel safe whilst working as a Taxi Driver in Sunderland?



9.5.2 The respondents were then asked when they felt unsafe working in Sunderland. Figure 9.6 documents that over half of both hackney carriage respondents (60.1%) and just under half of private hire respondents (49.4%) stated that they felt unsafe whilst working at night in Sunderland.

Figure 9.6 When do you feel unsafe as a taxi driver in Sunderland?



9.5.3 Some 25.7% of the hackney carriage trade stated that they felt unsafe in certain areas of Sunderland, as did 24.7% of the private hire trade. The areas that were most commonly suggested as being unsafe were Hendon, Southwick and Pennywell.

9.6 **Ranks**

9.6.1 Members of both trades were asked whether they believe there is sufficient rank space in Sunderland. Some 78.1% of the hackney carriage respondents stated that there was not sufficient rank space for hackneys, whereas in contrast the majority of private hire respondents felt that there was sufficient rank space (68.1%).

9.6.2 Some 51.8% of the hackney carriage respondents stated that there are areas in Sunderland where there should be new hackney carriage ranks. In contrast the majority of private hire respondents (86.4%) said that there should be no new ranks.

9.6.3 Of those that stated there should be new ranks the most common areas requested were Holmeside, West Street and Green Terrace.

9.7 *Condition of Fleet*

9.7.1 Members of both trades were asked whether they felt current hackney carriage and private hire vehicle conditions were reasonable or unreasonable. Table 9.1 highlights that the majority of hackney carriage respondents (79.9%) think the current vehicle conditions are reasonable while just under half of private hire respondents are of the same opinion (47.3%).

Table 9.1 Are the current hackney carriage and private hire vehicle conditions reasonable?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Reasonable	139	79.9	35	47.3
Unreasonable	35	20.1	39	52.7
Total	174	100.0	74	100.0

9.8 *Driver Skills*

9.8.1 Both trades were asked if they felt that taxi drivers receive enough training before being granted a taxi drivers licence. Half of the hackney carriage trade (52.4%) were of the opinion that training was insufficient compared with a similar number (52.7%) of the private hire trade.

9.8.2 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 9.2 below.

Table 9.2 Opinions related to training (Multiple Response)

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
English Language	33	37.1	17	43.6
Customer Care	65	73.0	30	76.9
Disability Awareness	61	68.5	26	66.7
Driving Ability Test	36	40.4	21	53.8
Other	13	14.6	8	

20.5

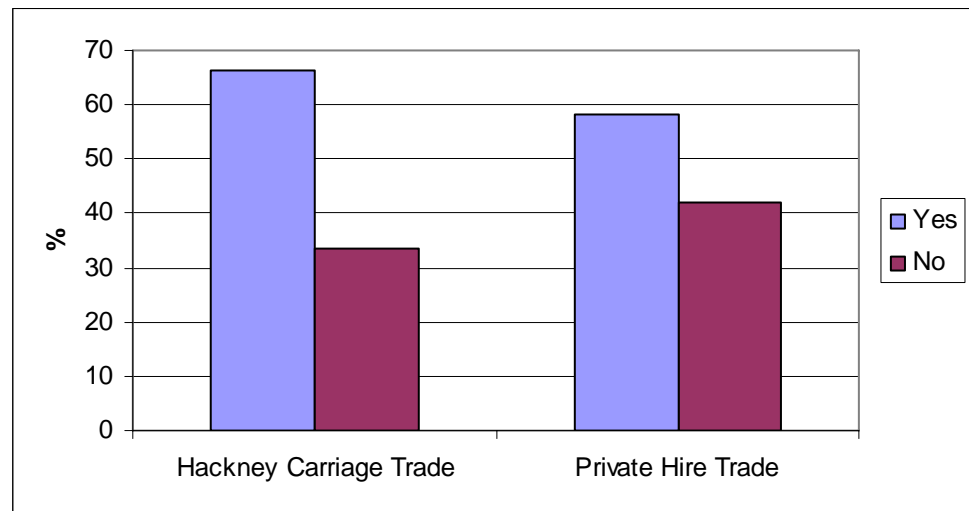
9.8.3 The hackney carriage trade felt that customer care training and disability awareness are the most important training they would like to see offered to drivers with 73% and 68.5% respectively. The private hire drivers were of a similar opinion with 76.9% and 66.7% respectively. Of those that stated other training, the most common suggestions were a harder knowledge test of the Sunderland area, PATS training, self defence and basic first aid.

9.8.4 Respondents were then asked whether the training should be compulsory or voluntary. Of those who answered this question, some 76.3% of the private hire trade said that the training should be compulsory, whereas 85.2% of the hackney carriage trade felt the training should be compulsory.

9.9 *Taxi Market in Sunderland*

9.9.1 Members of both trades were asked if they were aware that Sunderland City Council enforces a numerical limit of 284 on the number of hackney carriage vehicle licences in the Sunderland zone (zone 1) and 65 in the Hetton, Houghton, Washington zone (zone 2). The results are outlined in Figure 9.10.

Figure 9.10 Were you aware that there is a numerical limit on the number of hackney carriage vehicle licences in Sunderland?



9.9.2 The majority of the respondents were aware about the numerical limit, with 66.3% of the hackney respondents and 58.1% of the private hire respondents answering positively.

9.9.3

Members of both trades were asked whether they consider there to be sufficient hackney carriages to meet the current level of demand in Sunderland in each zone. Figure 9.11 indicates that over two thirds of respondents from the hackney carriage trade (68.4%) consider there to be too many hackney carriages to meet the demand in zone 1, compared to 31.9% of private hire drivers. Figure 9.12 indicates that in zone 2 just over a third of hackney carriage respondents (34.8%) felt there were too many hackney carriages, compared to 22.6% of the private hire respondents.

Figure 9.11 Do you consider there to be sufficient hackney carriages to meet the current level of demand in Sunderland Zone 1?

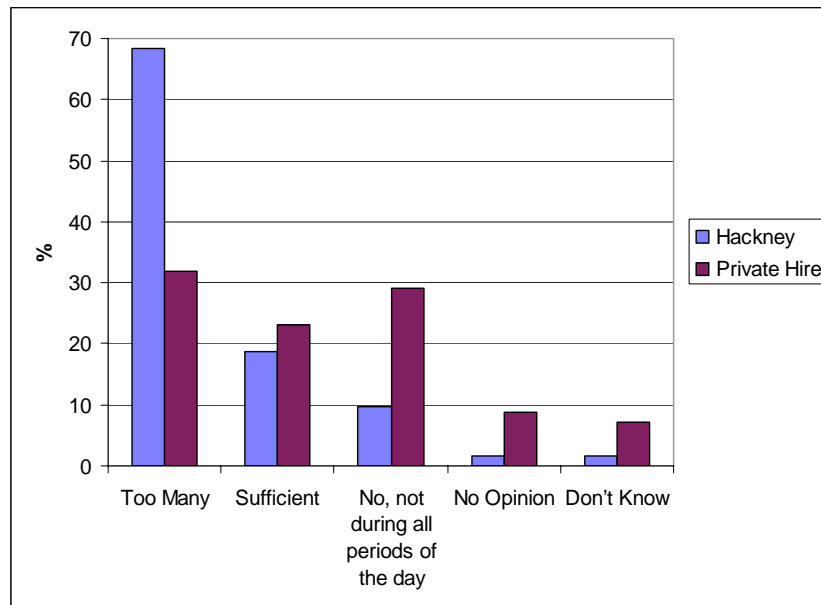
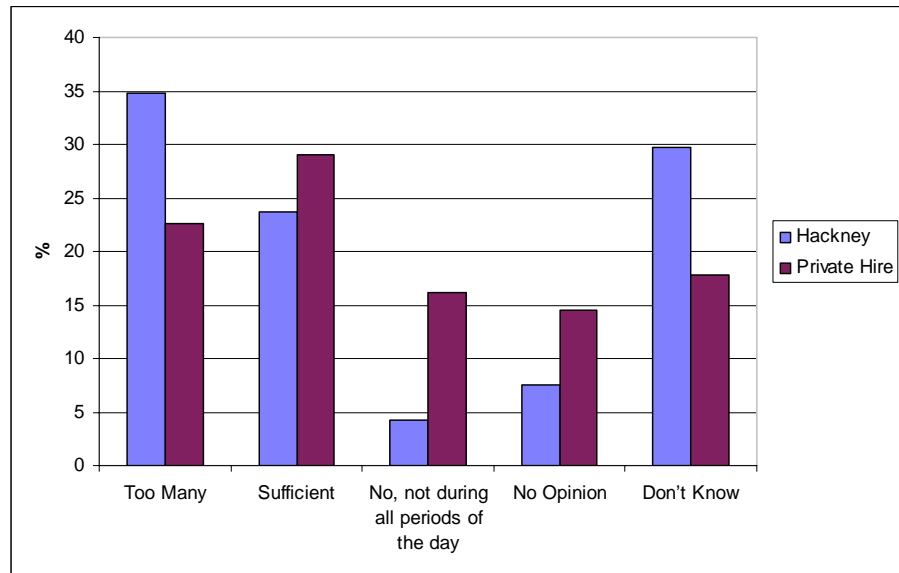


Figure 9.12 Do you consider there to be sufficient hackney carriages to meet the current level of demand in Hetton, Houghton, Washington Zone 2?



9.9.4 Those who felt there was an insufficient number of hackney carriages were asked when they felt more were required. In zone 1 50% of the hackney carriage trade felt that more hackney carriages were needed during the evening/night, a further 43.7% indicating they felt more were needed across all times of the day and night. The private hire trade indicated similar responses with 52.6% during the evening/night and 42.1% across all times of the day.

9.9.5 In zone 2 40% of hackney carriage drivers felt more hackney carriages were required during the evening/night as did 37.5% of the private hire respondents.

9.9.6 All respondents were asked to state what they thought the ideal fleet size for hackney should be in each zone. The results are detailed in figures 9.13 and 9.14. Of those drivers who responded, 67.2% of the hackney carriage trade felt that the fleet size in zone 1 should be less than the present number, compared to less than 30% of private hire respondents. The average fleet cited by hackney drivers for Zone 1 was 253 and 67 for Zone 2. The average fleet cited by private hire drivers for Zone 1 was 311 and 100 for Zone 2.

9.9.7 In zone 2, 53% of hackney carriage drivers felt that the fleet size should be less than the current number.

Figure 9.13 Opinion of the Hackney Carriage and Private Hire trade of the Ideal Hackney Carriage Fleet Size in Zone 1.

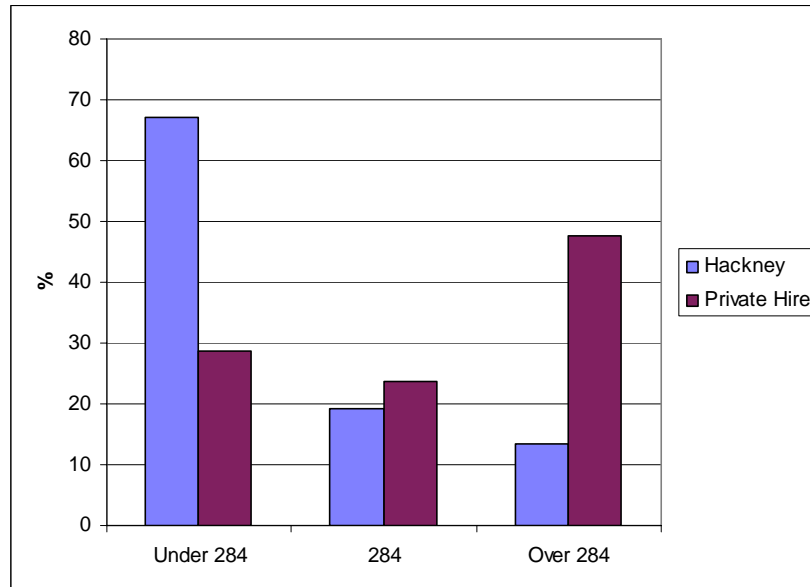
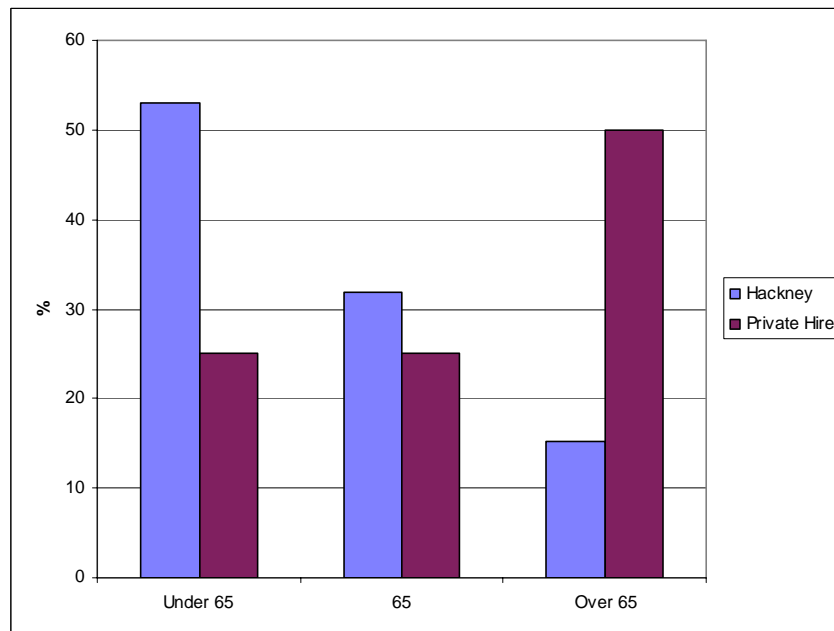


Figure 9.14 Opinion of the Hackney Carriage and Private Hire trade of the Ideal Hackney Carriage Fleet Size in Zone 2.



9.9.8

All respondents were asked to state if they thought that Sunderland CC should remove the numerical limit on the number of hackney carriage vehicle licences in zone 1 and zone 2. The responses are detailed in Figure 9.15 and 9.16.

Figure 9.15 Should Sunderland CC remove the numerical limit in zone 1?

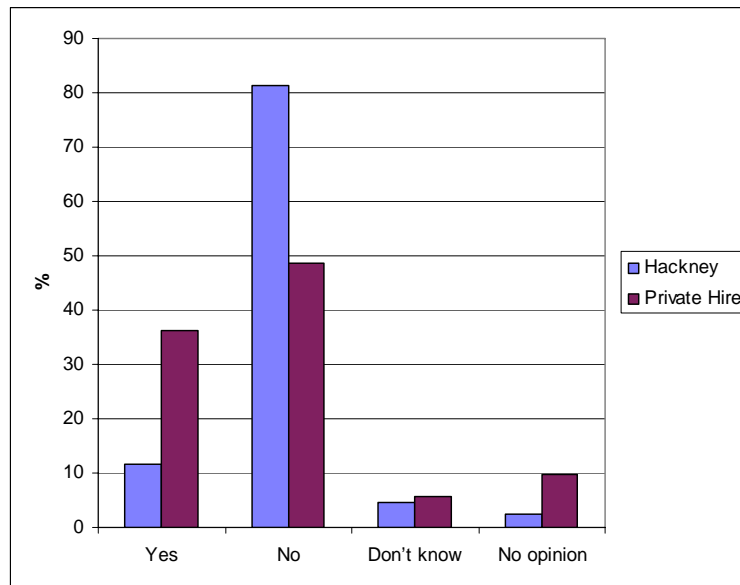
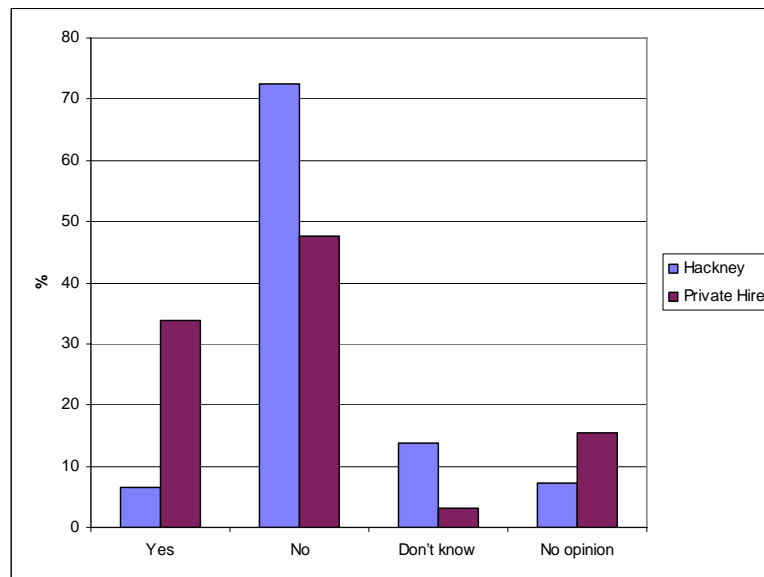


Figure 9.16 Should Sunderland CC remove the numerical limit in zone 2?



9.9.9 The majority of respondents from the hackney carriage trade (81.4%) felt that the numerical limit should not be removed in zone 1, compared to 48.6% of private hire respondents. In zone 2 similarly 72.4% of respondents from the hackney carriage trade felt that the numerical limit should not be removed compared to 47.7% of private hire respondents.

9.9.10 Views were sought regarding the likely impact on a series of factors if Sunderland CC were to remove the existing limit on hackney carriage licences. The findings are summarised below and presented in Table 9.3.

Congestion

9.9.11 The majority of respondents from the hackney carriage trade (81.3%) felt congestion would increase, compared to 47.8% from the private hire trade.

Fares

9.9.12 Just under half of hackney carriage respondents (42.1%) considered that there would be no effect on fares following de restriction, with 62.5% of the private hire trade indicating the same opinion.

Passenger Waiting Times

9.9.13 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

9.9.14 Over half of respondents from the hackney carriage trade felt hackney vehicle and private hire vehicle quality would decrease, compared to between half and three quarters of private hire trade respondents stating that there would be no change.

Effectiveness of Enforcement

9.9.15 With regard to effectiveness of enforcement, 55.7% of the hackney carriage trade were of the opinion that removing existing licence restrictions would result in a decrease. Less than a third of the private hire trade were of the same opinion (30.8%).

Illegal Plying for Hire

9.9.16 In terms of illegal plying for hire by private hire vehicles, 40.6% of the private hire trade were of the opinion that a change in licence restriction conditions would decrease this activity, compared to only 18.1% of private hire drivers.

Over Ranking

9.9.17 Both the hackney carriage and private hire trade felt over ranking would increase, with a response of 79.8% and 55.7% respectively.

Customer Satisfaction

9.9.18 Half of private hire drivers (49.3%) were of the opinion that customer satisfaction would increase as a result of the removal of the licence limit, compared to only 13.4% of the hackney trade.

Table 9.3 What would happen should Sunderland CC remove the numerical limit?

	Hackney Carriage Trade			Private Hire Trade		
	Increase	No Effect	Decrease	Increase	No Effect	Decrease
Traffic Congestion	81.3	16.4	2.3	47.8	43.5	8.7
Fares	28.3	42.1	29.6	23.4	62.5	14.1
Passenger waiting times at ranks	7.3	65.2	27.4	5.9	29.4	64.7
Passenger waiting time when	5.0	71.4	23.6	7.4	27.9	64.7
Passenger waiting time by telephone	8.1	71.3	20.6	17.6	39.7	42.6
Hackney carriage vehicle quality	6.0	35.1	58.9	26.2	52.3	21.5
Private hire vehicle quality	7.7	32.3	60.0	14.7	73.5	11.8
Effectiveness of enforcement	5.7	38.6	55.7	21.5	47.7	30.8
Illegal plying for hire – private hire	56.1	25.7	18.1	15.9	43.5	40.6
Illegal plying for hire – unlicensed	54.4	30.8	14.8	19.1	42.6	38.2
Over ranking	79.8	12.5	7.7	55.7	31.4	12.9
Customer satisfaction	13.4	46.3	40.2	49.3	34.3	16.4

9.9.19

All respondents were asked their response to “There is not enough work to support the current number of hackney carriages”. The results in table 9.4 show that over half of hackney carriage respondents (79.3%) strongly agree or agree with the statement that there is not enough work to support the current number of hackney carriages. Only 48.6% of private hire either strongly agree or agree that there is not enough work.

Table 9.4 Opinion of: “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	19	10.6	12	17.1
Disagree	13	7.3	16	22.9
Neither agree nor disagree	5	2.8	8	11.4
Agree	33	18.4	17	24.3
Strongly agree	109	60.9	17	24.3
Total	179	100.0		100.0

9.9.20

The survey then asked opinions of the following statement; “Removing the limit on the number of hackney carriages in Sunderland would benefit the public by reducing waiting times at ranks”. The results in table 9.5 shows that 69.8% of hackney carriage drivers strongly disagreed or disagreed that removing the limit on the number of hackney carriages in Sunderland would benefit the public by reducing waiting times at ranks, whereas only 51.5%of Private Hire respondents agreed or strongly agreed.

Table 9.5 Opinion of: "Removing the limit on the number of hackney carriages in Sunderland would benefit the public by reducing waiting times at ranks"?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Strongly disagree	83	48.3	12	17.6
Disagree	37	21.5	11	16.2
Neither agree nor disagree	18	10.5	10	14.7
Agree	20	11.6	18	26.5
Strongly agree	14	8.1	17	25.0
Total	172	100.0	68	100.0

9.9.21 The survey then asked opinions of the following statement; "There are special circumstances in Sunderland that make the retention of the numerical limit essential". The results in table 9.6 show that 63.2% of hackney carriage trade agree or strongly agree that there are special circumstances in Sunderland that make the retention of the numerical limit essential, whereas Private Hire on the whole neither agreed or disagreed (26.7%) with the statement.

Table 9.6 Opinion of: "There are special circumstances in Sunderland that make the retention of the numerical limit essential"

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Strongly disagree	16	10.3	11	18.3
Disagree	16	10.3	10	16.7
Neither agree nor disagree	25	16.1	16	26.7
Agree	32	20.6	12	20.0
Strongly agree	66	42.6	11	18.3
Total	155	100.0	60	100.0

9.9.22 Finally the trade were asked what effect they thought it would have on them if the authority removed the numerical limit. The results show in table 9.7 that 56.3% of hackney carriage responses cited they would work more hours if the numerical limit was

removed. Some 51.9% of hackney responses stated that they would leave the trade if Sunderland derestricted. In contrast 36.4% of private hire drivers said they would not change if the limit was removed, and 33.8% said they would switch from private hire to hackney.

9.9.23

Of those respondents who stated another effect de restriction would have, the main concern for hackney carriage drivers was financial.

Table 9.7 Effect on the trade if the numerical limit was removed (Multiple responses)

Effect of removing the limit	Hackney Carriage Trade		Private Hire Trade	
	Frequenc	Percent	Frequency	Percent
No change	21	11.5	28	36.4
Work more hours	103	56.3	28	36.4
Work fewer hours	17	9.3	4	5.2
Acquire a hackney vehicle licence	15	8.2	21	27.3
Acquire more than hackney vehicle licence	2	1.1	1	1.3
Switch from hackney to private hire	11	6.0	0	0.0
Switch from private hire to hackney	4	2.2	26	33.8
Leave the trade	95	51.9	15	19.4
Other	1	0	2	2.6

Summary

Key findings from the survey can be summarised as follows:

- Approximately half of both trades have been involved in the Sunderland trade for over 10 years;
- Almost a fifth of private hire respondents stated that they never carry disabled passengers;
- Some 78.1% of hackney carriage respondents and 69.7% of private hire respondents stated that they felt unsafe some of the time whilst working in Sunderland;
- The majority of hackney carriage drivers felt that the current vehicle conditions are reasonable;
- Some 56.3% of hackney carriage drivers stated that they would work more hours if Sunderland City Council de restricted and 51.9% stated that they would leave the trade.

10 Summary and Conclusions

10.1 *Introduction*

10.1.1 Halcrow has conducted a study of the hackney carriage market on behalf of Sunderland City 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 Sunderland ;
- to recommend the increase in licences required to eliminate any significant unmet demand.

10.1.3 In addition Sunderland City Council has requested that the study determines whether:

- It is in the interest of the travelling public in Sunderland for the council to continue to restrict hackney carriage numbers; and
- If so, should the authority:
 - Maintain the current limit of hackney carriage licences;
 - Grant a number of new licences to meet the unmet demand that may have been identified by the survey or
 - Grant a specific number of new hackney carriage licences each year

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

10.2 *Significant Unmet Demand- Sunderland Zone (Zone 1)*

10.2.1 The 2008 study has identified that there is NO evidence of significant unmet demand for hackney carriages in the Sunderland zone. 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 284;
- 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

Significant Unmet Demand- Washington, Hetton and Houghton Zone (Zone 2)

10.3.1

The 2008 study has identified that there is NO evidence of significant unmet demand for hackney carriages in the Washington, Hetton and Houghton Zone. 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.

10.3.2

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

- continue to limit the number of vehicles at 65;
- 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.

10.4

Is it in the interest of the travelling public to continue to restrict hackney carriage numbers?

10.4.1

From the point of view of the consumer, for a given level of fares, vehicle quality and driver quality, there is benefit associated with a higher number of hackney carriages. Since a higher number of vehicles would result from the removal of the entry restriction, it follows that there is a benefit to the public from the removal of entry restriction. This benefit is realised through lower delays in obtaining a vehicle. There may be an additional benefit associated with the increased availability of accessible vehicles if this condition is applied to all new hackney licences.

10.4.2

With respect to availability, average passenger delays at ranks across the week has been observed at just 0.23 minutes in zone 1 and 0.12 minutes in zone 2. The evidence suggests that, in practice, the potential to improve passenger service through additional licences is limited, i.e. the level of detriment to the public from the existence of a numerical limit is low.

10.4.3

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. The key points are summarised in the table below.

Benefits to hackney vehicle licence plate owners from continued entry control	Benefits to the public from the removal of entry control
<ul style="list-style-type: none"> • Hackney licences likely to continue to command a re-sale value • Hackney vehicle licence holders' incomes are higher. 	<ul style="list-style-type: none"> • Increased availability of vehicles for hire resulting in (marginal) reductions in overall waiting times at taxi ranks • improved availability of vehicles for flagdown • Increased availability of accessible vehicles.

10.4.4 A further relevant consideration is the impact of re-restriction on the operation of hackneys. The level of provision in the authority is relatively high. If de restriction was accompanied by a condition that all new vehicle licences should be attached to accessible vehicles, it is likely that the resulting increase in the fleet in Sunderland will be in the range of 54 to 106 vehicles.

10.4.5 In consultation, trade members have referred to the risk of de-restriction resulting in a reduction in driver and vehicle quality. Both of these aspects of service are regulated by the licensing authority but 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.

10.4.6 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.

10.4.7 In considering a move toward de-restriction the authority should bear in mind that some members of the trade may have incurred debt against the expectation of future returns from the sale of vehicle licences. A phased introduction of free entry, say, over three

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.

years, would reduce the impact on existing trade members who are affected in this manner.

10.4.8

An alternative to complete de-restriction is managed growth. This provides the benefit of increased supply whilst enabling the licensing authority to retain the discretion to monitor the impact and adjust policy accordingly. Given the relatively low level of passenger delay actually observed in Sunderland a managed growth policy could provide a good compromise between the needs of all stakeholders. Manchester City Council has successfully pursued a managed growth policy for the last 20 years. An appropriate level of expansion for Sunderland might be 8 per year for 5 years with a review after 3 years to gauge the impact.

Rank Location	Number of Bays	Time in Use	Plate Colour
Railway Station, Athenaeum Street (Opposite entrance)	4	Full Time	Yellow (saloon and wheelchair accessible vehicles)
Rear Fawcett Street (West Side)	9	Full Time	Yellow (saloon and wheelchair accessible vehicles)
Rear Fawcett Street (East Side)	3	Full Time	Yellow (saloon and wheelchair accessible vehicles)
Park Lane	6	Full Time	Red (saloon and wheelchair accessible vehicles)
Union Street	7	Full Time	Orange (saloon and wheelchair accessible vehicles)
Southwick Green	3	Full Time	All Colours
Whitburn Road, Seaburn	3	Full Time	All Colours
High Street West (Adj. Londonderry)	3	Full Time	All Colours
West Street	5	Part Time 6pm to 8am	Orange/Red (saloon and wheelchair accessible vehicles)
Holmeside	9	Part Time Midnight to 4am	All Colours
High Street East	3	Part Time 8pm to 3am	All Colours
High Street West (Adj. Chambers)	6	Part Time 6pm to 4am	All Colours

Crowtree Road	2	Part Time 6pm to 8am	Orange/Red (saloon and wheelchair accessible vehicles)
Rear Fawcett Street (East Side)	3	Part Time	Yellow (saloon and wheelchair accessible vehicles)
Athenaeum Street	3	Part Time 6pm to 8am	All Colours
Union Street	8	Part Time 6pm to 8am	Orange (saloon and wheelchair accessible vehicles)
High Street West (Adj. Londonderry)	3	Part Time 6pm to 8am	All Colours
Park Lane fronting Chase	3	Part Time 6pm to 8am	All Colours
Green Terrace (Informal near Glass Spider)			
Newbottle Street, Houghton	1	Full Time	Green
Durham Road, Houghton	3	Full Time	Green
Access to Swimming Baths, Hetton le Hole	5	Full Time	Green
Asda, The Galleries	5	Full Time	Green
In Shops, The Galleries	5	Full Time	Green
Victoria Road, Washington	2	Full Time	Green
Spout Lane, Washington Village	3	6pm to midnight	Green

Victoria Road, Washington	2	6pm to midnight	Green
Galleries Bus Depot, Washington	5	6pm to midnight	Green

Athenaeum Street

Saturday 22/11/2008 1000-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1000-1100	0	0	0	19	0.00	0.00	0	1	0	1	0
1100-1200	7	3	0	34	0.00	56.67	0	2	0	1	0
1200-1300	13	7	0	28	0.00	20.00	0	2	0	1	0
1300-1400	12	10	0	24	0.00	12.00	0	1	0	1	0
1400-1500	32	13	0	26	0.00	10.00	0	2	0	1	0
1500-1600	50	18	0	22	0.00	6.11	0	0	0	1	0
1600-1700	59	22	0	41	0.00	9.32	0	3	0	0	1
1700-1800	99	40	0	62	0.00	7.75	0	3	0	0	1
Total	272	113	0	256	0.00	11.33			0	6	2

Thursday 20/11/2008 0800-1600

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
0800-0900	11	9	0	124	0.00	68.89	0	9	0	0	1
0900-1000	20	10	0	100	0.00	50.00	0	6	0	0	1
1000-1100	30	10	0	108	0.00	54.00	0	8	0	0	1
1100-1200	29	16	0	112	0.00	35.00	0	7	0	0	1
1200-1300	18	9	0	117	0.00	65.00	0	8	0	0	1
1300-1400	0	10	0	125	0.00	62.50	0	9	0	0	1
1400-1500	16	12	0	116	0.00	48.33	0	8	0	0	1
1500-1600	22	13	0	123	0.00	47.31	0	9	0	0	1
Total	146	89	0	925	0.00	51.97			0	0	8

Friday 21/11/2008 1600-0000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1800-1900	21	14	0	33	0.00	11.79	0	2	0	1	0
1900-2000	29	17	0	36	0.00	10.59	0	3	0	0	1
2000-2100	25	16	0	26	0.00	8.13	0	1	0	1	0
2100-2200	17	12	0	33	0.00	13.75	0	2	0	1	0
2200-2300	14	10	0	36	0.00	18.00	0	3	0	0	1
2300-2400	6	4	0	22	0.00	27.50	0	1	0	1	0
Total	112	73	0	186	0.00	12.74			0	4	2

Sunday 16/11/2008 1400-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1400-1500	30	19	0	35	0.00	9.21	0	2	0	1	0
1500-1600	20	11	0	32	0.00	14.55	0	2	0	1	0
1600-1700	20	14	0	34	0.00	12.14	0	2	0	1	0
1700-1800	17	13	0	33	0.00	12.69	0	2	0	1	0
Total	87	57	0	134	0.00	11.75			0	4	0

Wednesday 19/11/2008 1600-0000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1600-1700	49	24	0	91	0.00	18.96	0	4	0	0	1
1700-1800	49	33	0	146	0.00	22.12	0	7	0	0	1
1800-1900	16	16	0	172	0.00	53.75	0	13	0	0	1
1900-2000	10	8	0	105	0.00	65.63	0	7	0	0	1
2000-2100	6	4	0	168	0.00	210.00	0	10	0	0	1
2100-2200	30	12	0	152	0.00	63.33	0	11	0	0	1
2200-2300	4	3	0	81	0.00	135.00	0	4	0	0	1
2300-0000	0	2	0	107	0.00	267.50	0	7	0	0	1
Total	164	102	0	1022	0.00	50.10			0	0	8

Union Street

Sunday 23/11/2008 1400-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1400-1500	7	2	0	10	0.00	25.00	0	0	0	1	0
1500-1600	3	1	0	8	0.00	40.00	0	0	0	1	0
1600-1700	4	1	0	8	0.00	40.00	0	0	0	1	0
1700-1800	9	3	0	17	0.00	28.33	0	1	0	1	0
Total	23	7	0	43	0.00	30.71			0	4	0

Monday 17/11/2008 1800-0000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1800-1900	0	0	2	0	0.00	0.00	2	0	0	1	0
1900-2000	0	1	0	0	0.00	0.00	0	0	0	1	0
2000-2100	0	0	0	0	0.00	0.00	0	0	0	1	0
2100-2200	0	0	0	0	0.00	0.00	0	0	0	1	0
2200-2300	0	0	0	0	0.00	0.00	0	0	0	1	0
2300-0000	0	1	0	1	0.00	5.00	0	0	0	1	0
Total	0	2	2	1	0.00	2.50			0	6	0

Saturday 1/2008 - 15/11/ 1000-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1000-1100	9	5	0	7	0.00	7.00	0	0	0	1	0
1100-1200	3	4	0	19	0.00	23.75	0	0	0	1	0
1200-1300	8	9	0	28	0.00	15.56	0	1	0	1	0
1300-1400	6	8	0	26	0.00	16.25	0	1	0	1	0
1400-1500	7	5	0	29	0.00	29.00	0	1	0	1	0
1500-1600	3	5	0	32	0.00	32.00	0	1	0	1	0
1600-1700	7	5	0	23	0.00	23.00	0	1	0	1	0
1700-1800	12	6	0	18	0.00	15.00	0	1	0	1	0
Total	55	47	0	182	0.00	19.36			0	8	0

Friday 14/11/2008 1000-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1000-1100	12	10	0	36	0.00	18.00	0	2	0	1	0
1100-1200	15	10	0	77	0.00	38.50	0	4	0	0	1
1200-1300	20	11	0	59	0.00	26.82	0	2	0	1	0
1300-1400	22	18	0	44	0.00	12.22	0	3	0	0	1
1400-1500	7	4	0	57	0.00	71.25	0	3	0	0	1
1500-1600	16	7	20	1	6.25	0.71	7	0	1	0	0
1600-1700	0	0	0	20	0.00	0.00	0	0	0	1	0
Total	92	60	20	294	1.09	24.50			1	3	3

Park Lane

Saturday 22/11/2008 1000-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1000-1100	5	7	0	71	0.00	50.71	0	2	0	1	0
1100-1200	1	2	1	104	5.00	260.00	1	6	0	0	1
1200-1300	6	12	0	92	0.00	38.33	0	5	0	0	1
1300-1400	4	5	6	45	7.50	45.00	5	0	1	0	0
1400-1500	5	4	0	90	0.00	112.50	0	6	0	0	1
1500-1600	4	2	0	70	0.00	175.00	0	5	0	0	1
1600-1700	2	3	0	76	0.00	126.67	0	5	0	0	1
1700-1800	5	6	0	81	0.00	67.50	0	4	0	0	1
Total	32	41	7	629	1.09	76.71			1	1	6

Sunday 16/11/2008 1400-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1400-1500	7	7	0	109	0.00	77.86	0	6	0	0	1
1500-1600	6	5	0	54	0.00	54.00	0	3	0	0	1
1600-1700	7	4	0	55	0.00	68.75	0	3	0	0	1
1700-1800	8	8	0	94	0.00	58.75	0	1	0	1	0
Total	28	24	0	312	0.00	65.00			0	1	3

Tuesday 18/11/2008 0800-1600

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
0800-0900	2	1	0	34	0.00	170.00	0	2	0	1	0
0900-1000	4	7	0	34	0.00	24.29	0	1	0	1	0
1000-1100	2	10	0	60	0.00	30.00	0	5	0	0	1
1100-1200	11	17	0	77	0.00	22.65	0	3	0	0	1
1200-1300	20	16	0	64	0.00	20.00	0	1	0	1	0
1300-1400	14	10	0	64	0.00	32.00	0	4	0	0	1
1400-1500	5	7	0	79	0.00	56.43	0	5	0	0	1
1500-1600	11	9	0	80	0.00	44.44	0	0	0	1	0
Total	69	77	0	492	0.00	31.95			0	4	4

Wednesday 19/11/2008 1800-0000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1800-1900	31	22	0	80	0.00	18.18	0	4	0	0	1
1900-2000	16	18	0	56	0.00	15.56	0	4	0	0	1
2000-2100	13	11	0	61	0.00	27.73	0	4	0	0	1
2100-2200	35	26	0	46	0.00	8.85	0	0	0	1	0
2200-2300	0	4	0	114	0.00	142.50	0	7	0	0	1
2300-0000	23	21	0	62	0.00	14.76	0	0	0	1	0
Total	118	102	0	419	0.00	20.54			0	2	4

Friday 21/11/2008 1800-0000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1800-1900	6	5	0	71	0.00	71.00	0	5	0	0	1
1900-2000	2	8	0	80	0.00	50.00	0	6	0	0	1
2000-2100	6	6	0	64	0.00	53.33	0	4	0	0	1
2100-2200	4	7	0	59	0.00	42.14	0	4	0	0	1
2200-2300	2	2	0	82	0.00	205.00	0	4	0	0	1
2300-0000	5	5	0	41	0.00	41.00	0	2	0	1	0
Total	25	33	0	397	0.00	60.15			0	1	5

West Street

Friday 14/11/2008 1900-2300

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1900-2000	3	2	0	10	0.00	25.00	0	0	0	1	0
2000-2100	15	10	0	13	0.00	6.50	0	0	0	1	0
2100-2200	13	8	1	26	0.38	16.25	0	0	0	1	0
2200-2300	10	9	0	21	0.00	11.67	0	1	0	1	0
Total	41	29	1	70	0.12	0.00			0	4	0

Tuesday 25/11/2008 1900-2300

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1900-2000	3	4	0	50	0.00	62.50	0	3	0	0	1
2000-2100	1	4	0	56	0.00	70.00	0	3	0	0	1
2100-2200	8	8	0	38	0.00	23.75	0	2	0	1	0
2200-2300	0	3	0	51	0.00	85.00	0	3	0	0	1
Total	12	19	0	195	0.00	51.32			0	1	3

Park Lane (Chase)

Saturday 15/11/2008 2000-0300

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2000-2100	9	16	0	12	0.00	3.75	0	0	0	1	0
2100-2200	20	17	0	30	0.00	8.82	0	0	0	1	0
2200-2300	91	61	33	28	1.81	2.30	8	0	1	0	0
2300-0000	97	62	26	18	1.32	1.46	8	0	1	0	0
0000-0100	102	62	18	8	0.88	0.65	9	0	1	0	0
0100-0200	114	73	49	7	2.15	0.48	12	0	1	0	0
0200-0300	96	62	12	11	0.63	0.89	3	0	1	0	0
Total	529	353	138	114	1.30	1.62			5	2	0

Thursday 20/11/2008 2000-0400

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2000-2100	7	6	0	4	0.00	3.33	0	0	0	1	0
2100-2200	4	5	3	10	3.75	10.00	3	0	1	0	0
2200-2300	6	8	0	114	0.00	71.25	0	8	0	0	1
2300-0000	5	9	0	71	0.00	39.44	0	5	0	0	1
0000-0100	12	14	0	99	0.00	35.36	0	3	0	0	1
0100-0200	1	13	0	41	0.00	15.77	0	2	0	1	0
0200-0300	4	4	0	28	0.00	35.00	0	0	0	1	0
0300-0400	0	7	0	3	0.00	2.14	0	0	0	1	0
Total	39	66	3	370	0.38	28.03			1	4	3

Green Terrace (unofficial rank)

Saturday 15/11/2008 2000-0400

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2000-2100	16	13	0	51	0.00	19.62	0	1	0	1	0
2100-2200	40	23	0	82	0.00	17.83	0	5	0	0	1
2200-2300	55	31	0	127	0.00	20.48	0	7	0	0	1
2300-0000	138	66	7	156	0.25	11.82	2	10	0	0	1
0000-0100	237	153	48	101	1.01	3.30	20	0	1	0	0
0100-0200	310	158	198	20	3.19	0.63	25	0	1	0	0
0200-0300	273	150	454	0	8.32	0.00	50	0	1	0	0
0300-0400	310	158	525	0	8.47	0.00	50	0	1	0	0
Total	1379	752	1232	537	4.47	3.57			4	1	3

Thursday 20/11/2008 2000-0400

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2000-2100	11	9	0	13	0.00	7.22	0	0	0	1	0
2100-2200	14	13	0	39	0.00	15.00	0	2	0	1	0
2200-2300	29	18	0	52	0.00	14.44	0	3	0	0	1
2300-0000	20	13	0	44	0.00	16.92	0	3	0	0	1
0000-0100	59	39	0	54	0.00	6.92	0	3	0	0	1
0100-0200	64	41	0	75	0.00	9.15	0	5	0	0	1
0200-0300	48	34	0	116	0.00	17.06	0	9	0	0	1
0300-0400	127	83	0	71	0.00	4.28	0	2	0	1	0
Total	372	250	0	464	0.00	9.28			0	3	5

Spout Lane

Wednesday 19/11/2008 1900-0000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1900-2000	0	0	0	0	0.00	0.00	0	0	0	1	0
2000-2100	0	1	0	1	0.00	5.00	0	0	0	1	0
2100-2200	0	1	0	4	0.00	20.00	0	0	0	1	0
2200-2300	2	3	0	5	0.00	8.33	0	0	0	1	0
2300-0000	2	2	0	3	0.00	7.50	0	0	0	1	0
Total	4	7	0	13	0.00	9.29			0	5	0

Saturday 22/11/2008 1900-0000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1900-2000	0	0	0	12	0.00	0.00	0	1	0	1	0
2000-2100	7	4	0	13	0.00	16.25	0	0	0	1	0
2100-2200	2	2	0	11	0.00	27.50	0	0	0	1	0
2200-2300	4	2	0	12	0.00	30.00	0	0	0	1	0
2300-0000	19	7	0	12	0.00	8.57	0	0	0	1	0
Total	32	15	0	60	0.00	20.00			0	5	0

Riverside (unofficial)

Wednesday 26/11/2008 2000-0200

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2000-2100	2	1	0	9	0.00	45.00	0	0	0	1	0
2100-2200	0	0	0	12	0.00	0.00	0	1	0	1	0
2200-2300	3	1	0	6	0.00	30.00	0	0	0	1	0
2300-0000	4	1	0	15	0.00	75.00	0	1	0	1	0
0000-0100	0	0	0	21	0.00	0.00	0	1	0	1	0
0100-0200	0	0	0	24	0.00	0.00	0	2	0	1	0
Total	9	3	0	87	0.00	145.00			0	6	0

Saturday 29/11/2008 2200-0400

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2200-2300	1	1	0	69	0.00	345.00	0	5	0	0	1
2300-0000	2	2	0	69	0.00	172.50	0	5	0	0	1
0000-0100	1	1	0	70	0.00	350.00	0	5	0	0	1
0100-0200	0	1	0	68	0.00	340.00	0	5	0	0	1
0200-0300	1	1	0	45	0.00	225.00	0	3	0	0	1
0300-0400	0	1	0	39	0.00	195.00	0	2	0	1	0
Total	5	7	0	360	0.00	257.14			0	1	5

In Shops (WSH)

Saturday 15/11/2008 1000-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1000-1100	12	8	0	77	0.00	48.13	0	2	0	1	0
1100-1200	26	20	3	23	0.58	5.75	3	0	1	0	0
1200-1300	16	11	0	31	0.00	14.09	0	1	0	1	0
1300-1400	18	12	4	20	1.11	8.33	2	0	0	1	0
1400-1500	15	14	0	53	0.00	18.93	0	0	0	1	0
1500-1600	16	12	0	29	0.00	12.08	0	0	0	1	0
1600-1700	16	12	0	44	0.00	18.33	0	2	0	1	0
1700-1800	21	15	0	33	0.00	11.00	0	0	0	1	0
Total	140	104	7	310	0.25	14.90			1	7	0

Wednesday 19/11/2008 1000-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1000-1100	11	10	0	64	0.00	32.00	0	4	0	0	1
1100-1200	23	18	0	69	0.00	19.17	0	4	0	0	1
1200-1300	24	20	0	73	0.00	18.25	0	6	0	0	1
1300-1400	6	6	0	68	0.00	56.67	0	5	0	0	1
1400-1500	30	24	0	57	0.00	11.88	0	1	0	1	0
1500-1600	12	10	6	30	2.50	15.00	4	0	1	0	0
1600-1700	10	14	0	16	0.00	5.71	0	1	0	1	0
1700-1800	11	10	0	26	0.00	13.00	0	1	0	1	0
Total	127	112	6	403	0.24	17.99			1	3	4

Sunday 24/11/2009 1400-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1400-1500	2	2	5	4	12.50	10.00	2	0	0	1	0
1500-1600	0	1	12	2	0.00	10.00	2	0	0	1	0
1600-1700	0	0	2	0	0.00	0.00	2	0	0	1	0
1700-1800	0	0	0	0	0.00	0.00	0	0	0	1	0
Total	2	3	19	6	47.50	10.00			0	4	0

Asda

Saturday 15/11/2008 1000-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1000-1100	12	6	0	55	0.00	45.83	0	3	0	0	1
1100-1200	23	21	0	41	0.00	9.76	0	2	0	1	0
1200-1300	13	11	1	22	0.38	10.00	1	0	0	1	0
1300-1400	18	12	0	16	0.00	6.67	0	0	0	1	0
1400-1500	12	10	0	17	0.00	8.50	0	0	0	1	0
1500-1600	18	10	0	15	0.00	7.50	0	1	0	1	0
1600-1700	14	10	0	18	0.00	9.00	0	0	0	1	0
1700-1800	15	9	0	25	0.00	13.89	0	1	0	1	0
Total	125	89	1	209	0.04	11.74			0	7	1

Tuesday 18/11/2008 0800-1600

Rank Throughput	Queue 'Snap-Shot' Total	Service Quality	Queue Extremes	Market Conditions
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Hour	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
0800-0900	7	9	0	64	0.00	35.56	0	4	0	0	1
0900-1000	9	8	0	50	0.00	31.25	0	3	0	0	1
1000-1100	34	31	0	47	0.00	7.58	0	1	0	1	0
1100-1200	39	33	0	53	0.00	8.03	0	3	0	0	1
1200-1300	38	31	0	46	0.00	7.42	0	1	0	1	0
1300-1400	34	22	0	53	0.00	12.05	0	4	0	0	1
1400-1500	44	34	0	54	0.00	7.94	0	4	0	0	1
1500-1600	38	32	0	45	0.00	7.03	0	1	0	1	0
Total	243	200	0	412	0.00	10.30			0	3	5

Friday 21/11/2008 1600-2000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1800-1900	34	32	0	31	0.00	4.84	0	1	0	1	0
1900-2000	29	24	0	26	0.00	5.42	0	1	0	1	0
Total	63	56	0	57	0.00	5.09			0	2	0

Sunday 16/11/2008 1400-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1400-1500	21	15	0	80	0.00	26.67	0	3	0	0	1
1500-1600	27	21	0	48	0.00	11.43	0	3	0	0	1
1600-1700	11	8	0	15	0.00	9.38	0	0	0	1	0
1700-1800	0	0	0	0	0.00	0.00	0	0	0	1	0
Total	59	44	0	143	0.00	16.25			0	2	2

Tuesday 25/11/2008 1600-2000

Hour	Rank Throughput		Queue 'Snap-Shot' Total		Service Quality		Queue Extremes		Market Conditions		
	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
1800-1900	28	19	0	67	0.00	17.63	0	2	0	1	0
1900-2000	28	19	0	40	0.00	10.53	0	1	0	1	0
Total	56	38	0	107	0.00	14.08			0	2	0

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Appendix 3

Project	Sunderland Hackney Carriage Unmet Demand Study	Date	5 th January 2009
Note	Public Attitude Survey Results	Ref	CTDAKP000
Author	Emma Rawlinson		

1 Introduction

1.1 The purpose of this Technical Note is to present the results of a public attitude survey undertaken by Halcrow on behalf of Sunderland City Council.

1.2 A public attitude interview survey was designed with the aim of collecting information regarding opinions on the taxi market in the Sunderland Area. Surveys were carried out in Sunderland and in the areas of Hetton, Houghton and Washington. In particular, the surveys allowed an assessment of flagdown, telephone and rank delays, the satisfaction with delays, and general use information.

1.3 It should be noted that in the tables that follow the totals do not always add up to the same amount. This is due to one of two reasons. First, not all respondents were required to answer all questions; and second, some respondents failed to answer some questions that were asked.

2 Survey Administration and Sample Selection

2.1 A total of 559 interviews were carried out in November and December 2008. The age and gender samples are given in Table 1 below. The sample of 559 interviews provides a robust basis for assessment.

2.2 The age and gender samples are shown in Table 1 along with the actual turn-out figures.

Table 1 - Target and Actual Samples for Interview Surveys by Age and Gender

Category	Target Quota		Actual Quota	
	Frequency	Percent	Frequency	Percent
16-34	166	33.2	258	46.2
35-64	238	47.7	226	40.4
65+	96	19.1	75	13.4
Total	500	100.0	559	100.0
Male	240	48.0	319	57.1
Female	260	52.0	240	42.9
Total	500	100.0	559	100.0

2.3 As can be seen in Table 1, the survey provides an under representation of 35-64 and 65+ age categories and therefore an overrepresentation of 16-34 year olds. The survey also provides an under representation of female respondents and an overrepresentation of male respondents.

2.4 Respondents were asked to state if they were mobility impaired. Some 6.6% of respondents stated that they were mobility impaired.

2.5 The respondents were asked to give their economic status. The results are displayed in Table 2 below.

Table 2 - Economic Status

	Frequency	Percent
Full-time Employed	236	43.2
Part-time Employed	32	5.9
Unemployed	83	15.2
Student/Pupil	65	11.9
Retired	99	18.1
Housewife/Husband	23	4.2
Other	8	1.5
Total	546	100.0

2.6 Respondents were asked to specify their residency. The results are shown in Table 3.

Table 3 - Residency

	Frequency	Percent
Permanent Resident	453	83.7
Visitor	27	5.0
Tourist	6	1.1
University Student	55	10.2
Total	541	100.0

3 Characteristics of Last Trip by Taxi

3.1 Respondents were each asked if they had made a journey by taxi in Sunderland or Hetton, Houghton & Washington within the last three months. The survey found that 73.9% of respondents in Sunderland and 55.5% of respondents in Hetton, Houghton & Washington had used a taxi within this period. The results are displayed in Table 4.

Table 4 - Have you made a trip by taxi in the past three months?

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
Yes	232	73.9	136	55.5
No	82	26.1	109	44.5
Total	314	100.0	245	100.0

3.2 Respondents who had hired a taxi in the last three months were asked further questions about their experience. Over half of hirings from both areas were achieved by telephone with 58.0% of tripmakers in Sunderland and 62.5% of tripmakers in Hetton, Houghton & Washington giving this answer. Some 27.3% of tripmakers in Sunderland and 23.5% in Hetton, Houghton & Washington obtained a taxi at a rank. Table 5 reveals the pattern of taxi hire.

Table 5 - Method of Taxi Hire for Last Trip

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
Rank	63	27.3	32	23.5
Flagdown	34	14.7	19	14.0
Telephone	134	58.0	85	62.5
Total	231	100.0	136	100.0

3.3 Respondents were asked what type of vehicle they hired. The most common type of vehicle used was a saloon car (67.6% and 84.4%) with 27.4% and 13.1% hiring a wheelchair accessible vehicle as show in Table 6 below.

Table 6 - Vehicle type for last trip

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
Wheelchair Accessible Vehicle	60	27.4	16	13.1
Saloon car	148	67.6	103	84.4
Other	11	5.0	3	2.5
Total	219	100.0	122	100.0

3.4 Respondents who stated other gave the following answers:

- Minibus;
- Coach; and
- Cab.

3.5 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 there last taxi journey with 86.6% of respondents in Sunderland and 89.7% of respondents in Hetton, Houghton & Washington giving a positive answer. Table 7 shows that for each method of obtaining a taxi, the majority were satisfied with the service. Satisfaction with obtaining a taxi via telephone was the highest in Sunderland with 88.1%. Satisfaction with obtaining a taxi at a rank was highest in Hetton, Houghton & Washington with 93.8%.

Table 7 - Satisfaction with delay on last trip

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent Satisfied	Frequency	Percent Satisfied
Rank	58	87.9	30	93.8
Flagdown	28	80.0	15	78.9
Telephone	118	88.1	77	90.6

4 Attempted Method of Hire

4.1 To provide evidence of 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 Sunderland or Hetton, Houghton & Washington in the last three months. The results are summarised in Tables 8 and 9.

Table 8 - Given up attempting to hire a taxi by method of hire in the last three months in Sunderland

	Yes		No	
	Frequency	Percent	Frequency	Percent
Given up at a rank	48	15.3	266	84.7
Given up flagdown	56	17.9	257	82.1
Given up telephone	43	13.7	271	86.3

4.2 Some 15.3% of respondents in Sunderland had given up waiting for a taxi at a rank, with 17.9% having given up via flagdown and 13.7% via telephone.

Table 9 - Given up attempting to hire a taxi by method of hire in the last three months in Hetton, Houghton & Washington

	Yes		No	
	Frequency	Percent	Frequency	Percent
Given up at a rank	24	10.9	196	89.1
Given up flagdown	11	5.0	209	95.0
Given up telephone	14	6.4	206	93.6

4.3 Some 10.9% of respondents in Hetton, Houghton & Washington had given up waiting for a taxi at a rank, with 5.0% having given up via flagdown and 6.4% via telephone.

4.4 Those respondents who had given up waiting for a taxi were asked within which area of Sunderland they were waiting. The most popular answers were:

- City Centre;
- Chester Road;
- Park Lane;
- Washington;
- Glass Spider;
- Houghton; and
- Hetton.

4.5 Respondents were also asked what type of vehicle they required. Table 10 shows that the majority of respondents in both areas required any type of vehicle (77.6% and 89.5% respectively). Some 7.1% of respondents in Sunderland had given up waiting for a wheelchair accessible vehicle as had 8.8% of respondents in Hetton, Houghton & Washington. 5.9% of respondents in Sunderland and 1.7% of respondents in Hetton, Houghton & Washington had given up waiting for a vehicle for 4 or more passengers.

Table 10 - Vehicle type

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
Any type – it didn't matter	66	77.6	51	89.5
A wheelchair accessible vehicle	6	7.1	5	8.8
A saloon car	8	9.4	0	0.0
A vehicle for 4+ passengers	5	5.9	1	1.7
Other	0	0.0	0	0.0
Total	85	100.0	57	100.0

5 Hackney Carriage Limit

5.1 Respondents in Sunderland were asked if they were aware of the current numerical limit of 284 hackney carriages which Sunderland City Council enforces in the Sunderland zone. Some 85.4% of respondents were not aware of the limit.

5.2 Respondents in Hetton, Houghton & Washington were asked if they were aware of the current numerical limit of 65 hackney carriages which Sunderland City Council enforces in this zone. Some 79.5% were not aware of this limit.

5.3 Respondents were asked to state what effect an unlimited number of hackney carriages in Sunderland would have on a series of factors. The results are shown below in Tables 11 & 12.

Table 11- Effect of unlimited hackney carriages in Sunderland

	Effect of unlimited hackney carriages					
	Increase		No effect		Decrease	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Congestion	180	57.9	101	32.5	30	9.6
Fares	96	31.1	174	56.3	39	12.6
Passenger Waiting Time	55	17.9	167	54.2	86	27.9
Hackney Vehicle Quality	61	19.8	214	69.5	33	10.7
Private Hire Vehicle Quality	62	20.1	211	68.5	35	11.4
Customer Satisfaction	69	22.3	206	66.5	35	11.3

5.4 Some 57.9% of respondents in Sunderland felt that congestion would increase, with 31.1% stating that fares would increase due to unlimited numbers of hackney carriages in Sunderland. Some 27.9% felt that passenger waiting time would decrease whereas 19.8%

were of the opinion that hackney carriage vehicle quality would increase. 20.1% were of the opinion that private hire vehicle quality would also increase and 22.3% felt that customer satisfaction would increase.

Table 12- Effect of unlimited hackney carriages in Hetton, Houghton & Washington

	Effect of unlimited hackney carriages					
	Increase		No effect		Decrease	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Congestion	150	61.5	87	35.7	7	2.9
Fares	60	24.6	150	61.5	34	13.9
Passenger Waiting Time	39	16.0	126	51.6	79	32.4
Hackney Vehicle Quality	51	20.9	166	68.0	27	11.1
Private Hire Vehicle Quality	44	18.0	169	69.3	31	12.7
Customer Satisfaction	100	41.0	115	47.1	29	11.9

5.5 Some 61.5% of respondents in Hetton, Houghton & Washington felt that congestion would increase, with 24.6% stating that fares would increase due to unlimited numbers of hackney carriages in Hetton, Houghton & Washington. Some 32.4% felt that passenger waiting time would decrease whereas 20.9% were of the opinion that hackney carriage vehicle quality would increase. 18.0% were of the opinion that private hire vehicle quality would also increase and 41.0% felt that customer satisfaction would increase.

6 Service Improvements

6.1 Respondents were asked if they thought that taxi services in the Sunderland area could be improved. The responses indicate that the majority of respondents in Sunderland (62.6%) thought that taxi services could be improved whereas only 22.1% felt the same in Hetton, Houghton & Washington. The results are shown in Table 13.

Table 13 - Could taxi services be improved

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
Yes	194	62.6	54	22.1
No	116	37.4	190	77.9
Total	310	100.0	244	100.0

6.2 Those who considered that taxi services needed improvement were asked how they could be improved. Table 14 documents that 43.6% of respondents stated that taxis in Sunderland could be improved if they were made cheaper with 64.8% of respondents stating that taxis in Hetton,

Houghton & Washington could also be improved if they were made cheaper. Some 24.3% of Hetton, Houghton & Washington respondents stated that there was a need for better vehicles as did 17.1% of Sunderland respondents. 14.2% of Sunderland respondents felt that there was a need for more taxis and 13.5% a need for more ranks.

- 6.3 The respondent who stated other felt that better call centres were required when telephoning to book a taxi.

Table 14 - How could taxi services be improved (multiple responses)

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
More of them	44	14.2	0	0.0
More Ranks	42	13.5	3	4.1
Better Vehicles	53	17.1	18	24.3
Better Drivers	35	11.3	5	6.8
Cheaper	135	43.6	48	64.8
Other	1	0.3	0	0.0
Total	310	100.0	74	100.0

7 Safety & Security

- 7.1 Respondents were asked whether they felt safe when using taxis in the Sunderland area. The majority of respondents felt safe using taxis during the day (91.8% and 100% respectively), however some 31.4% of Sunderland respondents and 8.2% of Hetton, Houghton & Washington respondents stated that they felt unsafe using taxis at night in the corresponding areas.

Table 15 - Perception of safety during the day when using taxis in Sunderland Area

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
Yes	281	91.8	244	100.0
No	25	8.2	0	0.0
Total	306	100.0	244	100.0

Table 16 - Perception of safety during the night when using taxis in Sunderland Area

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
Yes	210	68.6	224	91.8
No	96	31.4	20	8.2
Total	306	100.0	244	100.0

7.2 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 the Sunderland area. Some 20.8% of responses in Sunderland and 35.3% of responses in Hetton, Houghton & Washington stated that CCTV in taxis would improve safety when using taxis in the Sunderland area. In comparison 25.7% of respondents in Sunderland would feel safer if CCTV were introduced at ranks and 30.8% if taxi marshals were introduced. Half of respondents in Hetton, Houghton & Washington felt that women taxi drivers would improve safety compared with 15.8% of respondents in Sunderland. The results are shown in table 17.

Table 17 - Improvements to safety and security when using taxis in Sunderland (multiple responses)

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
CCTV in taxis	42	20.8	12	35.3
CCTV on ranks	52	25.7	4	11.8
Taxi Marshalls at ranks	62	30.8	1	2.9
More Taxis	14	6.9	0	0.0
Women Drivers	32	15.8	17	50.0
Other	0	0.0	0	0.0
Total	202	100.0	34	100.0

8 New Ranks

8.1 Respondents were asked if there were any locations where they would like to see a new rank. Some 19.3% of Sunderland respondents were of the opinion that new ranks were required in Sunderland compared with just 1.3% in Hetton, Houghton & Washington.

Table 18 – Demand for New Ranks

	Sunderland		Hetton, Houghton & Washington	
	Frequency	Percent	Frequency	Percent
Yes	59	19.3	3	1.3
No	124	40.5	137	57.1
Don't Know	123	40.2	100	41.7
Total	306	100.0	240	100.0

8.2 Those individuals who stated they would like to see a new rank were subsequently asked to provide a location. The most popular locations were:

- City Centre;
- Doxford Park;
- Asda;
- Metro Stations;
- All Supermarkets; and
- Chester Road.

Appendix 4

Project	Sunderland Taxi Study 2008	Date	11th December 2008
Note	Consultation Responses	Ref	CTDAKP000
Author	Pam Murray		

1 *Introduction*

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.

2 *Direct Consultation*

2.1 In terms of direct consultation, a number of organisations were given the opportunity to attend a meeting to discuss a series of issues regarding the taxi market in Sunderland. Separate meetings were organised with the following:

- Hackney Carriage Trade Representatives;
- Private Hire Trade Representatives;
- Planning, Regeneration, Town Management and Tourism council representatives
- Police; and
- Disability Representatives.

2.2 The comments received are detailed below.

Police

2.3 Regarding adequacy of taxi provision the police felt that there are currently a sufficient number of taxis and there doesn't appear to be a shortage. The introduction of taxi marshals such as at Green Terrace has reduced disorder in the busy areas and means that a queue of around 100 people can be moved in approximately 20 minutes.

- 2.4 The police felt there was no real need to remove the numerical limit as no more taxis are needed. Alongside this in Green Terrace the taxis already licensed cause a traffic obstruction due to a lack of rank space, more taxis would only increase this congestion.
- 2.5 Overall it was felt that the majority of drivers are of good quality and the police receive very few complaints. The vehicles are well maintained and the drivers occupying them are generally well presented and polite.
- 2.6 The main point raised regarding extra training for drivers was that basic first aid would be useful as a first response in the case of an emergency situation prior to arrival of paramedics.
- 2.7 Regarding the publicity of taxi resources within Sunderland the police commented that many members of the public have no knowledge of the difference between private hire vehicles and hackney carriages, the main thing they are interested in is getting home so will approach any type of taxi. There was also the suggestion that if hackney carriage licence holders were required to complete specific training, and the public informed of this difference between hackney carriage and private hire, the public would be able to make an informed choice about what type of taxi to use and decide how they would feel safest on their journey.
- 2.8 There are no major problems with antisocial behaviour towards drivers, the only incidents are mainly at night time and are often unfounded due to people being intoxicated from a night out.
- 2.9 Regarding the hours many drivers work the police felt there was no real issue, only at specific times of year such as New Years Eve, one off occasions. In this instance 100 people may have to wait around an hour for a taxi, as opposed to the 20 minutes referenced earlier. One problem however, is that people don't want to travel to the centre on New Years Eve as they don't believe they will be able to get home, in turn this means there is less incentive for drivers to work as they won't get the patronage to make it worth while staying out and working.
- 2.10 It was felt that overall the taxi trade runs smoothly in Sunderland.

Hackney Carriage Trade Representatives

- 2.11 Regarding adequacy of provision the hackney trade representatives felt that there were too many licences in both zones and that the current numerical limit should either be maintained or reduced. It was commented upon that Sunderland is shrinking and no longer attracting so many people to the city centre, therefore with less people there is no need for

- extra taxis. It was considered that the only busy night is a Saturday night and Sunderland is a one night economy. Those representatives from the Washington area commented how most of their work is outward journeys to surrounding areas of Sunderland such as Newcastle etc, and there is no real night time economy in Washington with places closing by midnight, and as a result there is no need of any extra licences in this zone.
- 2.12 The trade is against derestriction. More taxis would lead to a greater number of people using radio circuits and therefore less people using the ranks.
- 2.13 The trade felt that enforcement within Sunderland was insufficient and this was due to a lack of resources. The Green Terrace rank was commented upon as it is not an official rank yet has taxi marshals in place, whilst the official Park Lane rank is un-marshalled as there is no CCTV and deemed unsafe for marshals to work. The police are interested in getting people out of the city centre and so do little to move cars away from the unofficial rank on Green Terrace, leaving the Park Lane rank less used, and less safe.
- 2.14 Regarding rank locations and adequacy the representatives from the Washington area commented that some ranks are badly marked, the rank at The Village being one instance. There are 2 official night ranks within Washington and one unofficial rank at the Riverside. The Washington representatives felt that the Riverside should be made into an official rank, however, this has previously been opposed by the traffic department who argue that the road is not wide enough.
- 2.15 The representatives from Washington suggested that Zone 2 taxis should be allowed to ply for hire via flagdown only (not on ranks) in zone 1 at the busy night time hours (e.g. between midnight and 4 or 6am). This would reduce dead mileage by allowing return journeys following a drop off in zone 1 and also extend the night time working hours. It was suggested this should also be allowed to work vice versa for those holding zone 1 licences. This suggestion was supported by 1 of the 2 hackney trade associations present.
- 2.16 Regarding the zoning system in place in Sunderland, some members felt that it should be 1 authority but the two sets of plates maintained. The Sunderland associations commented that the area should either be completely zoned (i.e. not incorporating the above suggestion around certain working hours), or not zoned at all.
- 2.17 Herrington Country Park was one suggestion for a possible new rank location, if this is going to be promoted as a venue for big events (previously hosted Radio 1's big weekend), then taxis will require knowledge of this and access to the park, this has not been the case in the past. A second suggested was outside Cuchinis on Vine Place. The trade commented that consultation with the planning department on issues of new ranks can sometimes be difficult due to resources.

- 2.18 Taxi access around Sunderland was discussed and the trade suggested that the use of bus lanes within the city would be beneficial for various reasons. The first of these was that it would reduce wasted mileage, secondly that it would increase efficiency for passengers and drivers by allowing the use of more direct routes. Finally taxis are a form of public transport and should therefore be allowed to be part of an integrated system and use the bus lanes. In Washington there is currently no use of the bus lanes, Sunderland does have limited use but this should be extended. The Sunderland representative raised the issue that Stagecoach have removed many services after 6pm and on Sundays leaving many of these bus lanes unused, taxis could make use of these to provide a more efficient service. The final point regarding taxi access was that a decision needs to be made as to whether regulation in all areas is the duty of the council or the duty of the police.
- 2.19 Regarding safety Park Lane was cited as an area that is often a flashpoint at the weekend, and is an area with no CCTV. Regarding the Green Terrace rank previously referenced the trade have previously been informed that the unofficial Green Terrace rank would be blocked off to force patrons to the Park Lane or other official ranks, this has not yet occurred and there are not the funds to employ marshals in this area.
- 2.20 In cases where marshals have been employed they do make the area safer and keep people calmer whilst waiting for transport home. The final comment regarding safety was that the police are not always much help as they do not prosecute matters such as non-paying fares.
- 2.21 Regarding quality of drivers and vehicles the trade said comments from those visiting the city have indicated that the vehicle quality and standard is good. They felt that the age restriction in place for hackney licences is a good thing because it maintains these high standards, and as a result Sunderland has a fairly new fleet of taxis, and the trade are in favour of managed growth of the fleet.
- 2.22 Currently all new hackney licenses require the vehicle to be wheelchair accessible, it was felt that this is not always necessary, especially in Washington as there are already enough vehicles of this kind. Wheelchair accessible vehicles involve a great expense and those in the private trade are able to purchase their vehicles for half the price and do not incur these restrictions. Comments were also made saying that some disabled people prefer to travel in saloon cars as opposed to specific wheelchair accessible vehicles, and at the current time those members of the public who do require a specific type of vehicle are always able to get them from the ranks.
- 2.23 The hackney trade representatives felt that there was no real need for any extra training for drivers as you get all the experience you need on the job. It was noted that those using wheelchair accessible vehicles should know what they are doing and how to operate them

- correctly, but due to the fact there are many different types of vehicles if training were introduced it would need to be very comprehensive, yet at the same time it would not be relevant to all dependent upon what vehicle you are driving.
- 2.24 The Washington representatives commented that despite there being a 2 zone system where they can only operate within one area, the basic knowledge test covers both areas, why is this necessary. Both associations agreed that a basic knowledge of both zones was necessary, but only a more detailed knowledge should be required for the zone in which they work.
- 2.25 Regarding fares the trade approach the authority when they feel there is a need for an increase in fares, and usually they are increased each year. The Washington representatives felt that private hire drivers should not be able to charge fare and a half when carrying more than 5 people.
- 2.26 Both associations felt that more signage is needed for the ranks and the public need more information to explain the difference between private hire and hackney carriages. They also felt that there is not enough enforcement within Sunderland of private hire taxis illegally plying for work.
- 2.27 Other issues raised during the consultation included concern over the current financial climate and that this will have an adverse effect on earnings for the next 1-3 years. Alongside this the number of people shopping online has increased, meaning that less people are visiting the city centre and therefore the potential for earnings has decreased. A further comment noted was that Sunderland is a 1 night a week economy and therefore there is no room for more taxis in the area. There is no guarantee that more licences would increase the number of people working these hours, and would also mean there would be more taxis during the day when trade is slower.
- 2.28 The Washington representatives stated that an increase in taxi licences would force some people in the area out of business. Both trades felt that the current fleet is adequate and an increase in vehicle numbers would lead to a decrease in the vehicle quality. Were a completed derestriction issued this would also lead to many vehicles only operating part time, and doing so at the busy periods at night whilst working another different job during the day. This could lead some current full time workers into being forced to do the same and operate only a certain times whilst getting another job, in order to maintain a living, leading to an overall less extensive coverage during certain periods of the day.
- 2.29 The final comment was that the planning and highways department need to realise the importance of taxis as part of an integrated transport system, especially with the decline in the number of bus services.

Private Hire Trade Representatives

- 2.30 Regarding the adequacy of taxi provision the private hire representatives felt there is no overall unmet demand within Sunderland, except at certain times late at night. They felt that the private hire fleet could be used more effectively and could be better utilised at peak times as and when required, e.g. through the use of mobile booking stations in the town centre, Green Terrace is one of the areas in which this would be useful.
- 2.31 The private hire representatives said that the public are not always able to get wheelchair accessible vehicles, especially for example at the train station. As well as this they felt that hackney carriage drivers do not always want to pick up disabled passengers as this is more time consuming than other fares.
- 2.32 Overall the private hire trade felt there are enough vehicles at this time.
- 2.33 When questioned about the image of the trade the representatives felt that all cars are of a good standard and quality. This standard is maintained with 2 stringent checks a year, along with spot checks on a night time to ensure enforcement of regulations. Regarding dress standards within the private sector it was felt that these are generally good but it can be difficult to enforce dress standards as many new drivers are of the opinion they are self employed. Companies can only impose standards of dress to a certain level otherwise drivers will move to another company.
- 2.34 Regarding training PATS (Passenger Assistant Training Scheme) training was suggested as a good idea and is currently part of some private hire company contracts. This is a Passenger Assistant Training Scheme which aims to improve passengers' safety by educating people on how best to meet the needs of their passengers. This includes legal, practical and safety issues, assisting passengers with disabilities, supervising children and young people with special needs and working with adults who require care and supervision. It was noted that many drivers don't feel they need training, especially those who have been working in the trade for many years.
- 2.35 If training were to become compulsory the representatives felt it would be best to introduce this for new drivers, or those getting a hackney plate for the first time. Alongside this customers need education on the use of certain vehicles, for instance not using prams in wheelchair accessible vehicles, as they are not designed to be clamped down in this manner. Training for those using wheelchair accessible vehicles is especially important to ensure the vehicle and any equipment is used correctly and passengers are transported safely.
- 2.36 When questioned regarding the provision of new ranks the Green Terrace Rank was discussed. The police move the public to this rank during the evenings meaning that

hackney carriages line up along the street but also towards the roundabout and this creates a traffic hazard. When new developments or venues are built taxi ranks should be incorporated into the initial travel plans for these areas. Also although there are many unused ranks these should remain in place as in the past there has been a shift in which area of the city is most popular and most greatly used, and this could well happen again in the future. Therefore, leaving these ranks will mean provision is already in place should this shift occur. E.g. on the east side of town, in the Holmeside/Park Lane area where there is to be regeneration work.

2.37 Regarding fares one of the trade representatives believed that fares should always be based on yardage and not on a flag, this ensures regular users are looked after and will continue to use the service in the future. The private hire fares in Sunderland are mirrored from the hackney carriage tariff, with many using meters, although they are able to set their own fares. It is believed many private hire drivers think they have to use the hackney tariff for fares. The private hire fares did not go up at the last increase and the representatives feel that fares are now getting very high. Taxis are now becoming a luxury, so some fare increase is required in order to maintain a decent level of income. Finally it was commented on that the private hire trade are no longer consulted on the hackney carriage tariff, as was the case in the past, and they believe they should be involved in this consultation.

2.38 The final discussion point related to publicity and the representatives felt that the best advertising is through word of mouth. Alongside this if the public were better informed of how to hire a private hire vehicle the service could be more efficiently used. E.g if a private hire vehicle were to drop off in the centre and there were people waiting on the opposite side of the road for a taxi they are not legally allowed to hire it. However, if a number for the firm is on the car and these members of the public ring and book the taxi, so long as no conversation has occurred between driver and public this taxi could then pick these passengers up legally, thus improving efficiency for all. Finally mobile booking stations would be one method of addressing excess demand on busy night time periods, and addressing the problem in the previous point.

3 Indirect Consultation

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.

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

- Sunderland City 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.

3.3 **The Sunderland Residents Federation provided a written response.** The association felt that there was an adequate supply of hackneys and private hires across Sunderland at all times of the day. However they felt that additional wheelchair accessible vehicles were required.

3.4 The association considered vehicle and driver quality to be good.

3.5 With regard to ranks the association stated that they wished to see additional ranks at railway stations and that all ranks should have shelters.

3.6 Following the recent fare increase fares were felt to be unfair.

3.7 The association thought that taxi marshals were a good effective idea.

3.8 **Children's Services (SCC)** provided a written response. Vehicles were considered to be of a high standard and most were considered to be fairly new. Most drivers were considered to be friendly – responses from parents concurred with this. With regard to accessible vehicles it was noted that sometimes it was difficult to track down vehicles suitable for larger wheelchairs.

3.9 **Sunderland Carers' Centre** in their written response considered that there are a reasonable number of wheelchair accessible taxis but every effort should be made to ensure the majority of taxis come up to this standard. Similarly most taxi drivers appear to be helpful to people with disabilities. The biggest issue for people with disabilities and their carers relates to cost. For many of these buses do not offer a suitable alternative so they use taxis more than most. The cumulative cost is therefore considerable. Voucher schemes etc. do not seem to have worked as taxis appear to prioritise other bookings over those using a voucher or similar. Given the problems with public transport it would be beneficial if there was a subsidised taxi scheme which worked for frequent users who were frail or disabled and their carers.

3.10 **Sunderland CC's Transportation Team** responded to the consultation. The department made reference to a study commissioned by the Tyne and Wear Transport team regarding

the role of taxis in Tyne and Wear. It was felt that the existing ranks are generally located in central areas or near to shopping parades, where pedestrian access is readily available.

3.11

The **Community Safety Officer** felt that the provision of sufficient taxis (hackney and private hire) is important in tackling late night violence by quickly dispersing the public during late night hours. The locations of ranks have been an issue for discussion between the Police and partners in the Safer Sunderland Partnership 'Local Multi Agency Problem Solving Group' for the City Centre for a number of years. However at the present time there are no live discussions involving the police regarding a change of ranks.

3.12

In general terms, the Safer Sunderland Partnership through its close liaison with the Police and other partners has used the 'Taxi Marshal' process for a number of years. Initially the project was operated by Police Officers, but over the last 12 months, marshalling has been carried out by a SIA approved company under contract to the City Council. Northumbria Police are enthusiastic about the success of the project as it releases officers for mainstream policing and positive comments have been made.

Appendix 5

Project	Sunderland Unmet Demand Survey 2008	Date	6 th January 2009
Note	Trade Survey Results	Ref	CTDAKP000
Author	Pam Murray		

1 *Introduction*

1.1 A public and private hire 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.

2 *Survey Administration*

2.1 The survey was conducted through a self completion questionnaire. These were sent to 1,300 licensed hackney and private hire drivers and operators in Sunderland. A total of 260 questionnaire forms were completed and returned, giving a response rate of around 20%, 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.

3 *General Operational Issues*

3.1 The responses provided have been disaggregated on a hackney carriage and private hire trade basis as shown in Table 1 below.

Table 3.1 Breakdown of Responses between Trades

	Frequency	Percent
Hackney Carriage Trade	183	70.4
Private Hire Trade	77	29.6
Total	260	100.0

3.2 The survey asked the respondents to state in what ways they were involved in the taxi market in Sunderland. The results are outlined in Table 3.1.

3.3 The survey asked respondents how long they had been involved with either the hackney carriage or private hire trade in Sunderland. Table 3.2 below shows the responses.

Table 3.2 Duration of Respondents Involvement in the Hackney/Private Hire Trade

Years	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
0 – 2	16	8.7	11	14.3
2 – 5	35	19.1	11	14.3
5 – 10	40	21.9	17	22.0
10 – 15	28	15.3	11	14.3
15 – 20	24	13.1	15	19.5
Over 20	40	21.9	12	15.6
Total	183	100.0	77	100.0

3.4 Table 3.2 indicates that 50.3% of hackney carriage respondents have been involved in the Sunderland taxi trade for over 10 years as have 49.4% of the private hire trade.

3.5 Hackney Carriage respondents were then asked what the colour of their hackney vehicle plate was, the results of which are shown in table 3.3.

Table 3.3 Colour of Hackney Vehicle Plate

Plate Colour	Hackney Carriage Trade	
	Frequency	Percent
Yellow	53	30.8
Red	51	29.7
Orange	50	29.0
Green	18	10.5
Total	172	100.0

3.6 Table 3.3 indicates the proportion of the trade who subscribe to a radio circuit. Almost two thirds of private hire respondents (63.6%) subscribe to a radio circuit as do 60% of hackney carriage respondents.

Table 3.3 Do you subscribe to a radio circuit?

	Hackney Trade		Private Hire Trade	
	Freq	%	Freq	%
Yes	99	60.0	42	63.6
No	66	40.0	24	36.4
Total	165	100.0	66	100.0

3.7 Respondents were asked to estimate the origin of their passenger fares for a week. The results are documented in Table 3.4.

Table 3.4 Average Origin of Passenger Fares

	Hackney Carriage			Private Hire		
	Mean %	Min	Max	Mean %	Min	Max
Rank	64.8	0	100	1.2	0	100
Flagdown	24.7	0	100	1.1	0	50
Radio Circuit	7.8	0	100	83.1	0	100
Other telephone booking	1.1	0	80	10.7	0	100
Contract Work	1.6	0	80	3.6	0	75

3.8 The average proportion of rank work for hackney carriages accounts for 64.8% per week. However some hackney carriages stated that they did not work from a rank. The average percentage of flagdown work for hackney carriages accounts for 24.7% of the typical week with radio circuit work accounting for 7.8%.

3.9 Radio Circuit work accounts for a high proportion of private hire driver's working week at an average of 83.1% with telephone booking accounting for an average of 10.7%.

4 Driving

4.1 Respondents were asked what type of vehicle they drove most frequently. Half of hackney carriage drivers (50.5%) drive a purpose built cab and the majority of private hire drivers (81.3%) drive a Saloon car.

Table 4.1 Duration of Respondents Involvement in the Hackney/Private Hire Trade

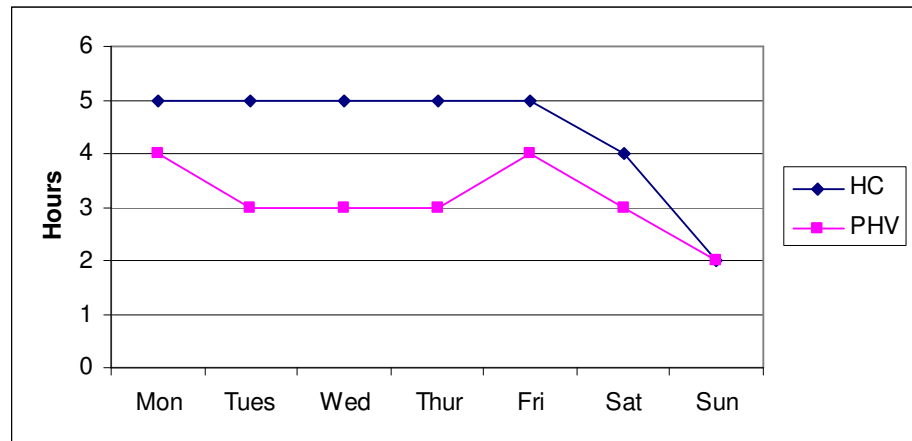
	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Saloon Car	16	16.2	61	81.3
Minibus/People Carrier (Wheelchair accessible)	33	33.3	2	2.7
Purpose built cab	50	50.5	7	9.3
Minibus/People Carrier (Non-Wheelchair accessible)	0	0.0	5	6.7
Total	99	100.0	75	100.0

4.2 Respondents were asked the average number of hours they worked in a typical week. Hackney drivers tended to work on average nearly 9 hours more a week than Private hire drivers. Hackney trade respondents worked on average for 52 hours per week compared to 43 hours per week for private hire drivers.

4.3

Respondents were asked to state how many hours they worked at different times of day during a typical week. Figure 4.1 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 for more hours during the daytime to the private hire drivers. It also shows that both trades tend to work less hours during the day on the weekends than during the weekdays.

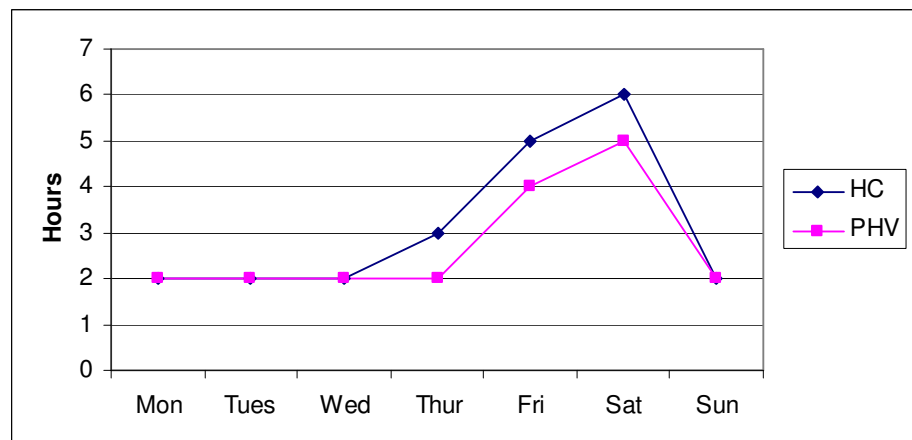
Figure 4.1 Average daytime hours worked



4.4

Figure 4.2 shows the average number of hours worked during the evening/night period (18:00-06:00). During the night time period the hackney carriage trade work, on average, longer hours than the private hire drivers. It also shows that both trades work for longer hours on a Thursday, Friday and Saturday night compared with other nights during the week.

Figure 4.2 Average night time hours worked



4.5

The trade were asked whether the Licensing Act 2003 had had an effect on them. The results are shown below in Table 4.2. 36.9% of hackney carriage

respondents stated that it had not had an effect on them compared with 50.0 of private hire respondents.

Table 4.2 Has the Licensing Act affected you?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	113	63.1	38	50.0
No	66	36.9	38	50.0
Total	179	100.0	76	100.0

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.

Table 4.3 Effects of the 2003 Licensing Act (Multiple responses)

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Work later in the evening	68	42.8	23	45.1
Work for longer hours	84	52.8	26	51.0
Other	7	4.4	2	3.9
Total	159	100.0	51	100.0

4.7 Responses were similar across both trades with 52.8% of the hackney carriage responses and 51.0% of the private hire trades responses stating that they had to work for longer hours.

4.8 Of those that stated 'other' they explained that since the Licensing Act 2003, they have to work longer hours for less money, and have to work later into the evening. Some respondents also commented that people will now sometimes get early morning buses instead of taxis.

4.9 Respondents were asked to state the number of times they carry disabled passengers on a weekly basis. Table 4.4 shows the results. Some 36.5% of hackney carriage respondents and 56.6% of private hire respondents were typically more likely to carry between one and five disabled persons per week.

Table 4.4 Frequency of Transport of Disabled Persons

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Never	17	9.6	14	18.4
1 to 5	65	36.5	43	56.6
5 to 10	45	25.3	8	10.5
10 to 20	33	18.5	9	11.9
More than 20	18	10.1	2	2.6
Total	178	100.0	76	100.0

5 Safety and Security

5.1 Respondents were asked whether they had been attacked by a passenger in the last year. Table 5.1 details the results.

Table 5.1 Frequency of attacks by passengers within the last year (multiple responses)

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Physically attacked	29	15.8	8	10.4
Verbally attacked	95	51.9	31	40.2
Not attacked	53	29.0	37	48.1

5.2 15.8% of the hackney carriage trade and 10.4% of the private hire trade have been physically attacked within the last twelve months, with 51.9% and 40.2% being verbally attacked.

5.3 The trade were asked if they felt safe whilst working as a taxi driver in Sunderland, the results of which are shown below in Table 5.2.

Table 5.2 Do you feel safe whilst working as a Taxi Driver in Sunderland?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes, all of the time	27	15.2	20	26.3
Some of the time	139	78.1	53	69.7
None of the time	12	6.7	3	4.0
Total	178	100.0	76	100.0

5.4 Some 78.1% of hackney carriage respondents stated that they felt safe some of the time compared to 69.7% of private hire respondents. Some 15.2% of hackney carriage respondents felt safe none of the time compared with 26.3% of private hire respondents.

5.5 The trade were then asked when they felt unsafe working in Sunderland. The results are outlined below in Table 5.3.

Table 5.3 When do you feel unsafe working in Sunderland? (Multiple responses)

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Daytime	18	9.8	6	7.8
Night time	110	60.1	38	49.4
In certain areas	47	25.7	19	24.7

5.6 The majority of both the hackney carriage respondents (60.1%) and private hire respondents (49.4%) stated that they felt unsafe whilst working at night in Sunderland.

5.7 Some 25.7% of the hackney carriage trade stated that they felt unsafe in certain areas of Sunderland, as did 24.7% of the private hire trade. The areas that were most commonly suggested as being unsafe were Hendon, Southwick and Pennywell.

6 Ranks

6.1 Members of both trades were asked whether they believe there is sufficient rank space in Sunderland. As shown in Table 6.1 over two thirds of the hackney carriage respondents (78.1%) stated that there was not sufficient rank space for

hackneys, whereas in contrast the majority of private hire respondents felt that there was sufficient rank space (68.1%).

Table 6.1 Sufficient rank space available for hackneys to use in Sunderland?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	39	21.9	47	68.1
No	139	78.1	22	31.9
Total	178	100.0	69	100.0

6.2 The trade were asked whether there were any areas where a new rank should be located. Table 6.2 shows that 51.8% of the hackney carriage respondents state that there are areas in Sunderland where there should be new hackney carriage ranks. In contrast the majority of private hire respondents (86.4%) said that there should be no new ranks.

Table 6.2 Are there any areas where there should be new hackney ranks?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	97	58.1	9	13.6
No	70	41.9	57	86.4
Total	167	100.0	66	100.0

6.3 Of those that stated that there should be new ranks, the most common areas requested were Holmeside, West Street and Green Terrace.

6.4 In response to the question asking whether there are any ranks in Sunderland that should be longer or have more spaces, 66.1% of the hackney carriage trade felt this was necessary, whereas 90.6% of the private hire trade said that there was no requirement. Green Terrace, Union Street, Park Lane and West Street, with some respondents suggesting all ranks should be lengthened.

Table 6.3 Ranks in Sunderland that should be longer or have more spaces

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	109	66.1	6	9.4
No	56	33.9	58	90.6
Total	165	100.0	64	100.0

6.5 The trade were then asked whether any ranks should be removed. The majority of both Hackney carriage and private hire respondents (76.5% and 62.9% respectively) stated that no ranks in Sunderland needed to be removed. Of those respondents that did state that ranks needed to be removed, the most common were;

- Outside the Londonderry pub
- Green Terrace.

Table 6.4 Do any ranks in Sunderland need to be removed?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	38	23.5	24	38.1
No	124	76.5	39	62.9
Total	162	100.0	63	100.0

7 Condition of Fleet

7.1 Members of both trades were asked about whether they felt current hackney carriage and private hire vehicle conditions were reasonable or unreasonable. Table 7.3 documents the results.

Table 7.3 Are the current hackney carriage and private hire vehicle conditions reasonable?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Reasonable	139	79.9	35	47.3
Unreasonable	35	20.1	39	52.7
Total	174	100.0	74	100.0

7.2 Table 7.3 highlights that the majority of hackney carriage respondents (79.9%) think the current vehicle conditions are reasonable while just under half of private hire respondents are of the same opinion (47.3%).

7.3 Those respondents who deemed the vehicle age conditions to be unsatisfactory provided the following reasons:

- *Too expensive to continuously replace vehicles*
- *Mileage of vehicles should be taken into account*
- *Age is irrelevant if vehicle can pass MOT*

8 Fares

8.1 Members of both trades were asked for their opinions regarding the current level of hackney carriage fares. Table 8.1 indicates the responses.

Table 8.1 Opinions Relating to Hackney Carriage Fares

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Too high	8	4.5	15	21.1
Too low	28	15.8	6	8.5
About right	138	78.0	38	53.5
None/no opinion	3	1.7	12	16.9
Total	177	100.0	71	100.0

8.2 The majority of hackney carriage respondents (78%) considered hackney carriage fares to be 'about right'. However private hire respondents were more split with 16.9% having no opinion, 53.5% stating that they were about right, and 21.1% said they were too high.

9 Training

9.1 Both trades were asked if they felt that taxi drivers receive enough training before being granted a taxi drivers licence. The majority of the hackney carriage trade (52.4%) were of the opinion that training was insufficient compared with 52.7% of the private hire trade.

Table 9.1 Do you feel drivers receive sufficient training?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	81	47.6	35	47.3
No	89	52.4	39	52.7
Total	170	100.0	74	100.0

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 9.2 below.

Table 9.2 Opinions related to training (Multiple Response)

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
English Language	33	37.1	17	43.6
Customer Care	65	73.0	30	76.9
Disability Awareness	61	68.5	26	66.7
Driving Ability Test	36	40.4	21	53.8
Other	13	14.6	8	20.5

9.3 The hackney carriage trade felt that customer care training and disability awareness are the most important training they would like to see offered to drivers with 73% and 68.5% respectively. The private hire drivers were of a similar opinion with 76.9% and 66.7% respectively. Of those that stated other training, the most common suggestions were a harder knowledge test of the Sunderland area, PATS training, self defence and basic first aid.

9.4 Respondents were then asked whether the training should be compulsory or voluntary. Of those who answered this question, some 76.3% of the private hire trade said that the training should be compulsory, whereas 85.2% of the hackney carriage trade felt the training should be compulsory.

Table 9.3 Should this training be compulsory or voluntary?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Compulsory	75	85.2	29	76.3
Voluntary	13	14.8	9	23.7
Total	88	100.0	38	100.0

10 *Taxi Market in Sunderland*

10.1 Members of both trades were asked if they were aware that Sunderland City Council enforces a numerical limit of 284 on the number of hackney carriage vehicle licences in the Sunderland zone (zone 1) and 65 in the Hetton, Houghton, Washington zone (zone 2). The results are outlined in Table 10.1.

Table 10.1 Were you aware that there is a numerical limit on the number of hackney carriage vehicle licences in Sunderland?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	114	66.3	43	58.1
No	58	33.7	31	41.9
Total	172	100.0	74	100.0

10.2 The majority of the respondents were aware about the numerical limit, with 66.3% of the hackney respondents and 58.1% of the private hire respondents answering positively.

10.3 Members of both trades were asked whether they consider there are sufficient hackney carriages to meet the current level of demand in Sunderland in each zone. Tables 10.2 and 10.3 indicates the responses.

Table 10.2 Do you consider there to be sufficient hackney carriages to meet the current level of demand in Sunderland Zone 1?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Too Many	121	68.4	22	31.9
Sufficient	33	18.6	16	23.2
No, not during all periods of the day	17	9.6	20	29.0
No Opinion	3	1.7	6	8.7
Don't Know	3	1.7	5	7.2
Total	177	100.0	69	100.0

Table 10.3 Do you consider there to be sufficient hackney carriages to meet the current level of demand in Hetton, Houghton, Washington Zone 2?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Too Many	41	34.8	14	22.6
Sufficient	28	23.7	18	29.0
No, not during all periods of the day	5	4.2	10	16.1
No Opinion	9	7.6	9	14.5
Don't Know	35	29.7	11	17.8
Total	118	100.0	62	100.0

10.4 Over two thirds of respondents from the hackney carriage trade (68.4%) consider there to be too many hackney carriages to meet the demand in zone 1, compared to 31.9% of private hire drivers. Some 29% of the private hire respondents stated that more hackney carriages are required in zone 1 during certain periods of the day to meet the current demand in Sunderland Zone 1, with 9.6% of the hackney carriage trade being of the same opinion.

10.5 In zone 2 just over a third of hackney carriage respondents (34.8%) felt there were too many hackney carriages, compared to 22.6% of the private hire respondents. 16.1% of private hire drivers felt there were more hackney carriages required in zone 2 during certain periods of the day, compared with just 4.2% of hackney carriage respondents.

10.6 Those respondents that did not consider there to be enough hackney carriages at certain times were then asked at which periods more hackney carriages were required. The responses for zones 1 and 2 and are shown in tables 10.4 and 10.5.

Table 10.4 When are more hackney carriages required in Zone 1?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
During the daytime	1	6.3	1	5.3
During the evening/night	8	50.0	10	52.6
All day and night	7	43.7	8	42.1
Total	16	100.0	19	100.0

Table 10.5 When are more hackney carriages required in Zone 2?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
During the daytime	1	10.0	2	12.5
During the evening/night	4	40.0	6	37.5
All day and night	5	50.0	8	50.0
Total	10	100.0	16	100.0

10.7 Of those who answered the question both the majority of hackney carriage and private hire drivers felt that more hackney carriages were needed during the evening/night time period with 50% and 52.6% respectively in zone 1. A further 43.7% of the hackney carriage trade and 42.1% of private hire respondents felt that there were more hackney carriages required across all times of the day within zone 1.

10.8 In zone 2 half of both hackney carriage and private hire respondents felt that more hackney carriages were required across all times of the day with a further 40% and 37.5% respectively of the opinion there are more hackney carriages required during the evening/night time in zone 2.

10.9 All respondents were asked to state how many hackney carriages there should be in the fleet in Sunderland, both in zone 1 and zone 2. The results are detailed in Tables 10.6 and 10.7.

Table 10.6 **Opinion on Ideal Hackney Carriage Fleet Size in zone 1**

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Under 284	80	67.2	6	28.6
284	23	19.3	5	23.8
Over 284	16	13.5	10	47.6
Total	119	100.0	21	100.0

Table 10.7 **Opinion on Ideal Hackney Carriage Fleet Size in zone 2**

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Under 65	35	53.0	4	25.0
65	21	31.8	4	25.0
Over 65	10	15.2	8	50.0
Total	66	100.0	16	100.0

10.10 Of those drivers who responded, 67.2% of the hackney carriage trade felt that the fleet size in zone 1 should be less than the present number, compared to 47.6% of private hire respondent who believe that the fleet size in zone 1 should be greater than the present number.

10.11 In zone 2 53% of hackney carriage drivers felt that the fleet size should be less than the current number, compared to 50% of the private hire trade with the opposing opinion that the fleet size in zone 2 should be greater than the present number.

10.12 The average size of Hackney Carriage fleet considered for Sunderland, zone 1 was 253 for the hackney carriage trade compared with 311 cited by the private hire trade.

10.13 The average size of Hackney Carriage fleet considered for Hetton, Houghton, Washington, zone 2 was 67 for the hackney carriage trade compared with 100 cited by the private hire trade.

10.14 All respondents were asked to state if they thought that Sunderland City Council should remove the numerical limit on the number of hackney carriage vehicle licences in zone 1 and zone 2. The responses are detailed in Tables 10.8 and 10.9.

Table 10.8 Opinion on Removing Current Limit on Number of Hackney Licences in Zone 1

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	20	11.6	26	36.1
No	140	81.4	35	48.6
Don't know	8	4.7	4	5.6
No opinion	4	2.3	7	9.7
Total	172	100.0	72	100.0

Table 10.9 Opinion on Removing Current Limit on Number of Hackney Licences in Zone 2

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Yes	8	6.5	22	33.8
No	89	72.4	31	47.7
Don't know	17	13.8	2	3.1
No opinion	9	7.3	10	15.4
Total	123	100.0	65	100.0

10.15 The majority of respondents from the hackney carriage trade (81.4%) felt that the numerical limit should not be removed in zone 1, in comparison to 48.6% of private hire respondents. Some 36.1% of private hire respondents wished for the limit to be removed in zone 1, as do 11.6% of the hackney carriage trade.

10.16 In zone 2 similarly 72.4% of respondents from the hackney carriage trade felt that the numerical limit should not be removed compared to 47.7% of private hire respondents. As with zone one around a third of private hire respondents (33.8%) felt that the numerical limit in zone 2 should be removed as do 6.5% of the hackney carriage trade.

10.17 Views were sought regarding the likely impact on a series of factors if Sunderland City Council were to remove the existing limit on hackney carriage licences. The findings are summarised below and presented in Table 10.10.

Congestion

10.18 The majority of respondents from the hackney carriage trade (81.3%) felt congestion would increase, compared to 47.8% from the private hire trade felt this would be the case.

Fares

10.19 Just under half of hackney carriage respondents (42.1%) considered that there would be no effect on fares following de restriction, with 62.5% of the private hire trade indicating the same opinion.

Passenger Waiting Times

10.20 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

10.21 Over half of respondents from the hackney carriage trade felt hackney vehicle and private hire vehicle quality would decrease, compared to between half and three quarters of private hire trade respondents stating that there would be no change.

Effectiveness of Enforcement

10.22 With regard to effectiveness of enforcement, 55.7% of the hackney carriage trade were of the opinion that removing existing licence restrictions would result in a decrease. Less than a third of the private hire trade were of the same opinion (30.8%).

Illegal Plying for Hire

10.23 In terms of illegal plying for hire by private hire vehicles, 40.6% of the private hire trade were of the opinion that a change in licence restriction conditions would decrease this activity, compared to only 18.1% of private hire drivers.

Over Ranking

10.24 Both the hackney carriage and private hire trade felt over ranking would increase, with a response of 79.8% and 55.7% respectively.

Customer Satisfaction

10.25

Half of private hire drivers (49.3%) were of the opinion that customer satisfaction would increase as a result of the removal of the licence limit, compared to only 13.4% of the hackney trade.

Table 10.10 Opinions Relating to the Impact of De-Restriction

	Hackney Carriage Trade			Private Hire Trade		
	Increase	No	Decrease	Increase	No	Decrease
Traffic Congestion	81.3	16.4	2.3	47.8	43.5	8.7
Fares	28.3	42.1	29.6	23.4	62.5	14.1
Passenger waiting times at ranks	7.3	65.2	27.4	5.9	29.4	64.7
Passenger waiting time when	5.0	71.4	23.6	7.4	27.9	64.7
Passenger waiting time by	8.1	71.3	20.6	17.6	39.7	42.6
Hackney carriage vehicle quality	6.0	35.1	58.9	26.2	52.3	21.5
Private hire vehicle quality	7.7	32.3	60.0	14.7	73.5	11.8
Effectiveness of enforcement	5.7	38.6	55.7	21.5	47.7	30.8
Illegal plying for hire – private hire	56.1	25.7	18.1	15.9	43.5	40.6
Illegal plying for hire – unlicensed	54.4	30.8	14.8	19.1	42.6	38.2
Over ranking	79.8	12.5	7.7	55.7	31.4	12.9
Customer satisfaction	13.4	46.3	40.2	49.3	34.3	16.4

10.26

All respondents were asked their response to “***There is not enough work to support the current number of hackney carriages***”. The results in table 10.11 show that over half of hackney carriage respondents (79.3%) strongly agree or agree with the statement that there is not enough work to support the current number of hackney carriages. Only 48.6% of private hire either strongly agree or agree that there is not enough work.

Table 10.11 Opinion of: “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	19	10.6	12	17.1
Disagree	13	7.3	16	22.9
Neither agree nor disagree	5	2.8	8	11.4
Agree	33	18.4	17	24.3
Strongly agree	109	60.9	17	24.3
Total	179	100.0		100.0

10.27 Some of the most common responses to the statement:

- *Not enough work.*
- *Long waiting times between fares and full ranks*
- *Too many cabs*
- *Work dependent on time of year and day of week.*

10.28 The survey then asked opinions of the following statement; “**Removing the limit on the number of hackney carriages in Sunderland would benefit the public by reducing waiting times at ranks**”. The results in table 10.12 show that 69.8% of hackney carriage drivers strongly disagreed or disagreed that removing the limit on the number of hackney carriages in Sunderland would benefit the public by reducing waiting times at ranks, whereas only 51.5 of Private Hire respondents agreed or strongly agreed.

Table 10.12 Opinion of: “Removing the limit on the number of hackney carriages in Sunderland would benefit the public by reducing waiting times at ranks”?

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Strongly disagree	83	48.3	12	17.6
Disagree	37	21.5	11	16.2
Neither agree nor disagree	18	10.5	10	14.7
Agree	20	11.6	18	26.5
Strongly agree	14	8.1	17	25.0
Total	172	100.0	68	100.0

10.29 Some of the most common responses to the statement:

- *Only on Saturday nights*
- *No waiting time at present during the week*
- *Would benefit customers*
- *Waiting time would be reduced around school hours*

10.30 The survey then asked opinions of the following statement; **“There are special circumstances in Sunderland that make the retention of the numerical limit essential”**. The results in table 10.13 show that 63.2% of hackney carriage trade agree or strongly agree that there are special circumstances in Sunderland that make the retention of the numerical limit essential, whereas Private Hire on the whole neither agreed or disagreed (26.7%) with the statement.

Table 10.13 Opinion of: “There are special circumstances in Sunderland that make the retention of the numerical limit essential”

	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
Strongly disagree	16	10.3	11	18.3
Disagree	16	10.3	10	16.7
Neither agree nor disagree	25	16.1	16	26.7
Agree	32	20.6	12	20.0
Strongly agree	66	42.6	11	18.3
Total	155	100.0	60	100.0

10.31 Some of the most common responses to the statement:

- *Compact city with terrible traffic problems*
- *Only just earn a living now*
- *Small city centre means more plates would lead to congestion and flood the already full ranks*
- *Not enough rank space.*

10.32 Finally the trade were asked what effect they thought it would have on them if the authority removed the numerical limit. The results show in table 10.14 that 38.3% of hackney carriage responses cited they would work more hours if the numerical limit of hackney carriages was removed. Some 35.3% of hackney responses stated that they would leave the trade if Sunderland derestricted. In contrast

22.4% of private hire drivers said they would not change if the limit was removed, and 20.8% said they would switch from private hire to hackney.

10.33 Of those respondents who stated another effect derestriction would have, the main concern for hackney carriage drivers was financial.

Table 10.14 Effect on the trade if the numerical limit was removed (Multiple responses)

Effect of removing the limit	Hackney Carriage Trade		Private Hire Trade	
	Frequency	Percent	Frequency	Percent
No change	21	7.8	28	22.4
Work more hours	103	38.3	28	22.4
Work fewer hours	17	6.3	4	3.2
Acquire a hackney vehicle licence	15	5.6	21	16.8
Acquire more than hackney vehicle licence	2	0.7	1	0.8
Switch from hackney to private hire	11	4.1	0	0.0
Switch from private hire to hackney	4	1.5	26	20.8
Leave the trade	95	35.3	15	12.0
Other	1	0.4	2	1.6
Total	269	100.0	125	100.0