

# **REPORT OF THE EXECUTIVE DIRECTOR OF CITY SERVICES**

## **REGULATORY COMMITTEE - 31 OCTOBER 2011**

### **SURVEY INTO HACKNEY CARRIAGE DEMAND**

#### **1.0 PURPOSE OF THE REPORT**

- 1.1** To inform Members of the findings of a survey undertaken by an independent consultancy company in relation to the Council's current policy of restricting the number of hackney carriage licences issued.

#### **2.0 DESCRIPTION OF DECISION (RECOMMENDATION)**

- 2.1** Members are recommended to consider, in light of the consultants' report, the retention of the current policy in relation to the quantity control of hackney carriage licences.

#### **3.0 BACKGROUND**

- 3.1** The Council has a policy of limiting the number of hackney carriages licensed. By virtue of Section 16 of the Transport Act 1985 local authorities may refuse an application for a hackney carriage licence in order to limit the number of carriages if, but only if, they are satisfied there is no significant unmet demand for hackney carriage services in their area. The Committee agreed on 29 November 2010 that consultants should be commissioned to determine whether there was any unmet demand for hackney carriages in the City and, in order that the Council may comply with the Department for Transport's Taxi and Private Hire Vehicle Licensing: Best Practice Guidance' issued in 2010, to consider whether it is in the interest of the travelling public in Sunderland for the Council to continue to restrict hackney carriage numbers.
- 3.2** A representative of the Consultants will attend Committee to address Members on this subject and a copy of their report is attached as Appendix 1.

#### **4.0 CURRENT POSITION**

- 4.1** The consultants have found that there is currently no significant unmet demand in either of the zones (Section 12.2 of the report refers). The Council is therefore entitled, legally, to retain the current policy. The consultants recommend that the Council could continue with its current policy, 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 hackney carriages (Section 12.5 of the report refers).
- 4.2** The consultants found that the potential to improve passenger service through additional licences is limited (Section 12.4 of the report refers). They report that the City-wide average of time spent by passengers waiting for a hackney carriage is lower than the average delay in other council areas they have studied. Furthermore, the average time that hackney carriage drivers wait for a fare is lengthier than the average in these other areas (Sections 5.7 and 7.7 of the report refer).

**4.3** As part of their survey, the consultants sought the views of the Police and the Council's Highways Section who both expressed concerns that the release of more licences may lead to 'over-ranking' problems (Section 9.2 of the report refers).

**4.4** Members may therefore conclude that it is in the interests of the travelling public to continue with the Council's current policy.

## **5.0 REASON FOR THE DECISION**

**5.1** To enable the Council to comply with the legislation pertaining to the licensing of hackney carriages.

## **6.0 ALTERNATIVE OPTIONS**

**6.1** None submitted.

## **7.0 RELEVANT CONSIDERATIONS/CONSULTATION**

**7.1** None.

## **8.0 GLOSSARY**

**8.1** No acronyms or abbreviations have been used in this report.

## **9.0 LIST OF APPENDICES**

**9.1** Appendix 1 - Hackney carriage demand survey report.

## **10.0 BACKGROUND PAPERS**

**10.1** Department for Transport - Taxi and Private Hire Vehicle Licensing: Best Practice Guidance

# Appendix 1

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# Sunderland Hackney Carriage Unmet Demand Study

Final Report

Sunderland City Council

September 2011

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# Sunderland Hackney Carriage Unmet Demand Study

Final Report

Sunderland City Council

September 2011

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## Document history

### Sunderland Hackney Carriage Unmet Demand Study

Final Report

Sunderland City Council

This document has been issued and amended as follows:

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# 1 Introduction

## 1.1 General

This study has been conducted by Halcrow on behalf of Sunderland City Council (SCC). SCC wishes to carry out a review of the current policy of quantity control and to produce a report on 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 council maintain the current limit of hackney carriage licences, grant a number of new licences to meet the unmet demand that may be identified by the survey, or grant a specific number of new hackney carriage licences each year?

In 2010 the Department for Transport (DfT) re issued Best Practice Guidance for Taxi and Private Hire licensing. The Guidance restates the DfT's position regarding quantity restrictions. Essentially, the DfT stated that the assessment of significant unmet demand, as set out in Section 16 of the 1985 Act, is still necessary but not sufficient in itself to justify continued entry control. The Guidance provides local authorities with assistance in local decision making when they are determining the licensing policies for their local area. Guidance is provided on a range of issues including: flexible taxi services, vehicle licensing, driver licensing and training.

The Equality Act 2010 provides a new cross-cutting legislative framework to protect the rights of individuals and advance equality of opportunity for all; to update, simplify and strengthen the previous legislation; and to deliver a simple, modern and accessible framework of discrimination law which protects individuals from unfair treatment and promotes a fair and more equal society.

The provisions in the Equality Act will come into force at different times to allow time for the people and organisations affected by the new laws to prepare for them. The Government is considering how the different provisions will be commenced so that the Act is implemented in an effective and proportionate way. Some provisions came in force on the 1st October 2010 however most of the provisions for taxi accessibility were not planned to come into effect until after April 2011 and have not yet done so.

Sections 165, 166 and 167 of the Equality Act 2010 are concerned with the provision of wheelchair accessible vehicles and place obligations on drivers of registered vehicles to carry out certain duties unless granted an exemption by the licensing authority on the grounds of medical or physical condition. From 1 October 2010, Section 166 allows taxi drivers to apply to their licensing authority for an exemption from Section 165 of the Equality Act 2010. Sections 165 and 167 have not come into effect yet.

Section 161 of the Equality Act 2010 qualifies the law in relation to unmet demand, to ensure licensing authorities that have 'relatively few' wheelchair accessible taxis operating in their area, do not refuse licences to such vehicles for the purposes of controlling taxi numbers. For section 161 to have effect, the Secretary of State must make regulations specifying:

- the proportion of wheelchair accessible taxis that must operate in an area before the respective licensing authority is lawfully able to refuse to license such a vehicle on the grounds of controlling taxi numbers; and

- the dimensions of a wheelchair that a wheelchair accessible vehicle must be capable of carrying in order for it to fall within this provision.

The DfT plans to consult on the content of regulations before section 161 comes in to force. The actual date is presently unknown.

## 2 Background

### 2.1 General

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

### 2.2 Sunderland Overview

The City of Sunderland is a metropolitan local authority area in Tyne and Wear, located in the North East of England. The City of Sunderland comprises the settlements of Hetton-le-Hole, Houghton-le-Spring, Sunderland and Washington. The population of Sunderland was 283,700 in 2005 (Office of National Statistics Mid Year Estimates).

### 2.3 Background to the Hackney Carriage Market in Sunderland

Sunderland Council currently limits the number of hackney carriage licences across two zones. In the Sunderland zone there are 284 hackney carriages and the Hetton, Houghton and Washington zone has 65 hackney carriages, giving a total of 349 taxis. This provides the City of Sunderland with a hackney carriage provision of one hackney per 813 resident population. Out of the 349 hackney carriage vehicles, 181 are wheelchair accessible.

Sunderland Council also licenses 634 private hire vehicles, of which 30 are wheelchair accessible vehicles.

### 2.4 Provision of Hackney Carriage Stands

There are currently 27 official stands located across the Sunderland licensing district. In this report the word 'rank' is used to refer to a location where hackney carriages queue to await passengers; whether an official stand or otherwise. A list of the ranks observed is included in Chapter 5.

Plates 1 and 2 show two of the main ranks in Sunderland.

**Plate 1 – Park Lane rank (Interchange)**



**Plate 2 – Sunderland Rail Station**

## 2.5 Hackney Carriage Fares

Hackney carriage fares are regulated by the Local Authority. There are three tariffs – one for Monday to Saturday travel (7am – 11pm); one for Monday to Saturday (11pm – 7am), and all day Sunday; and one from 6pm on 24<sup>th</sup> December to 7am on 27<sup>th</sup> December and from 6pm on 31<sup>st</sup> December to 7am on 2<sup>nd</sup> January and all day on other public and bank holidays.

The standard charge tariff is made up of two elements; an initial fee (or “drop”) for travelling a prescribed minimum distance, and the multiple of a prescribed fee charged for travelling additional prescribed distances or uncompleted parts of those distances, plus the multiple of a prescribed fee charged for units of waiting time. A standard two-mile daytime fare undertaken by one individual would therefore be £5.00. Table 2.1 outlines the fare structure in more detail.

Table 2.1 Sunderland Hackney Carriage Fare Tariff 2011

	Price
<b>Tariff 1 (For hirings between the hours of 7:00am and 11:00pm Monday to Saturday with the exception of public and bank holidays and the Christmas/New Year period).</b>  If the distance does not exceed 170 yards (155.45 metres) or part thereof If the distance exceeds 170 yards (155.45 metres), for the first 170 yards (155.45 metres) For each subsequent 265 yards (242.32 metres) or uncompleted part thereof	£2.40 £2.40 20p
<b>Tariff 2 (For hirings commenced between 11:00pm and 7:00am Monday to Saturday and all day Sunday with the exception of public and bank holidays and the Christmas / New Year period).</b>  If the distance does not exceed 170 yards (155.45 metres) or part thereof If the distance exceeds 170 yards (155.45 metres), for the first 170 yards (155.45 metres) For each subsequent 205 yards (187.45 metres) or uncompleted part thereof	£2.80 £2.80 20p
<b>Tariff 2 (For hirings commenced between 6:00pm on 24th December to 7:00am on 27<sup>th</sup> December. From 6:00pm on 31<sup>st</sup> December to 7:00am on 2<sup>nd</sup> January and all day on other public and bank holidays.</b>  If the distance does not exceed 170 yards (155.45 metres), for the whole distance If the distance exceeds 170 yards (155.45 metres), for the first 170 yards (155.45 metres) For each subsequent 205 yards (187.45 metres) or uncompleted part thereof	£3.80 £3.80 20p
<b>Additional Charges</b>  Fares for time – negotiated at time of hiring Waiting time (initial free waiting time 126 seconds) For each period of 60 seconds For each adult in excess of two in number Each article of luggage (wheelchairs 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 of the vehicle (maximum charge)	20p 20p 10p 10p 60p £30.00

Source: Sunderland Council

Private Hire and Taxi Monthly magazine publish monthly league tables of the fares for 380 authorities over a two mile journey. Each journey is ranked with one being the most expensive, the August 2011 tables show Sunderland rated 251<sup>st</sup> in the table – therefore Sunderland has lower than average fares. Table 2.2 provides a comparison of where neighbouring and nearby authorities rank in terms of fares. It shows that fares in Sunderland are some of the most expensive in comparison to neighbouring authorities.

**Table 2.2 Comparison of Neighbouring Authorities in Terms of Fares (figures are ranked out of a total of 380 Authorities with 1 being the most expensive)**

Local Authority	Rank
Newcastle	117
Darlington	212
<b>Sunderland</b>	<b>251</b>
Durham City	269
Gateshead	289
Stockton-on-Tees	338
Redcar and Cleveland	351
Middlesbrough	361
Hartlepool	375

*Source: Private Hire and Taxi Monthly, August 2011*

## 2.6 Tyne and Wear Local Transport Plan 2011-2026

This section considers the taxi (hackney and private hire) market within a wider context of transport policy. Taxis provide an important service for the public and have the potential to form an important part of an integrated public transport system.

The Local Transport Plan process required local authorities to consider in a holistic manner, how transport provision for their area contributes to wider objectives such as economic growth, accessibility, the environment and safety. Taxis are an integral part of local transport provision and should be taken into account within this provision.

The Plan recognises that taxis are key to the public transport system and the main objective of the plan, in terms of taxi and private hire vehicles, is to ensure that the role of the taxi trade is fully integrated into wider transport strategy. It is recognised that taxis are the only mode of public transport potentially available 24 hours a day throughout the Tyne and Wear region.

With regard to climate change, the plan states that it will aim to increase the number of new vehicles in the taxi fleet through the introduction of age-based limits and encourage taxi sharing. It also commented that taxi marshalling scheme are beneficial in reducing late night disorder at ranks.



Sunderland currently has the highest number of people in Tyne and Wear who are part of the TaxiCard scheme (900 people) which aims to combat social inclusion for those who are unable to access public transport.

## **2.7 Sunderland Residents' Survey 2010**

Ipsos Mori interviewed a total of 1,215 residents across to Sunderland to ascertain their views with regard to a number of local issues. One of these questions focussed upon the availability of taxis. Out of the residents interviewed some 88% were satisfied with the availability of taxis.



## 3 Benchmarking

### 3.1 Introduction

In order to assess the current level of taxi provision in Sunderland, it is necessary to benchmark Sunderland against other authorities which are classed as its statistically nearest neighbours.

The 'statistically nearest neighbours' are authorities which are of similar socio-economic standing to Sunderland and can be used for comparison purposes. They include; Barnsley, Durham, Gateshead, Halton, Hartlepool, North Tyneside, South Tyneside, St. Helen's, Tameside and Wakefield.

Sunderland has been benchmarked against these authorities on the following characteristics;

- Fleet composition;
- Population per hackney;
- Population per taxi;
- Entry control policy; and
- Fares

### 3.2 Fleet Composition

Figure 3.1 documents the fleet size for a number of licensing authorities in the UK. Wakefield has the largest fleet of private hire vehicles at 1,050 vehicles whilst Durham has the least with 43 vehicles. Sunderland has the largest provision of hackney carriages and the third largest hackney and private hire fleet combined.

In terms of population per hackney, figure 3.2 documents the results for the licensing authorities.

Figure 3.2 demonstrates that Barnsley has the greatest number of people per hackney carriage, giving them the lowest provision, whilst Halton has the lowest number of people per hackney carriage, giving them the best provision. However if per capita provision is looked at in terms of the whole 'taxi' fleet as in Figure 3.3, it appears that Tameside has the greatest number of people per capita, giving the lowest provision. Sunderland has an average per capita provision in comparison to its statistically nearest neighbours.

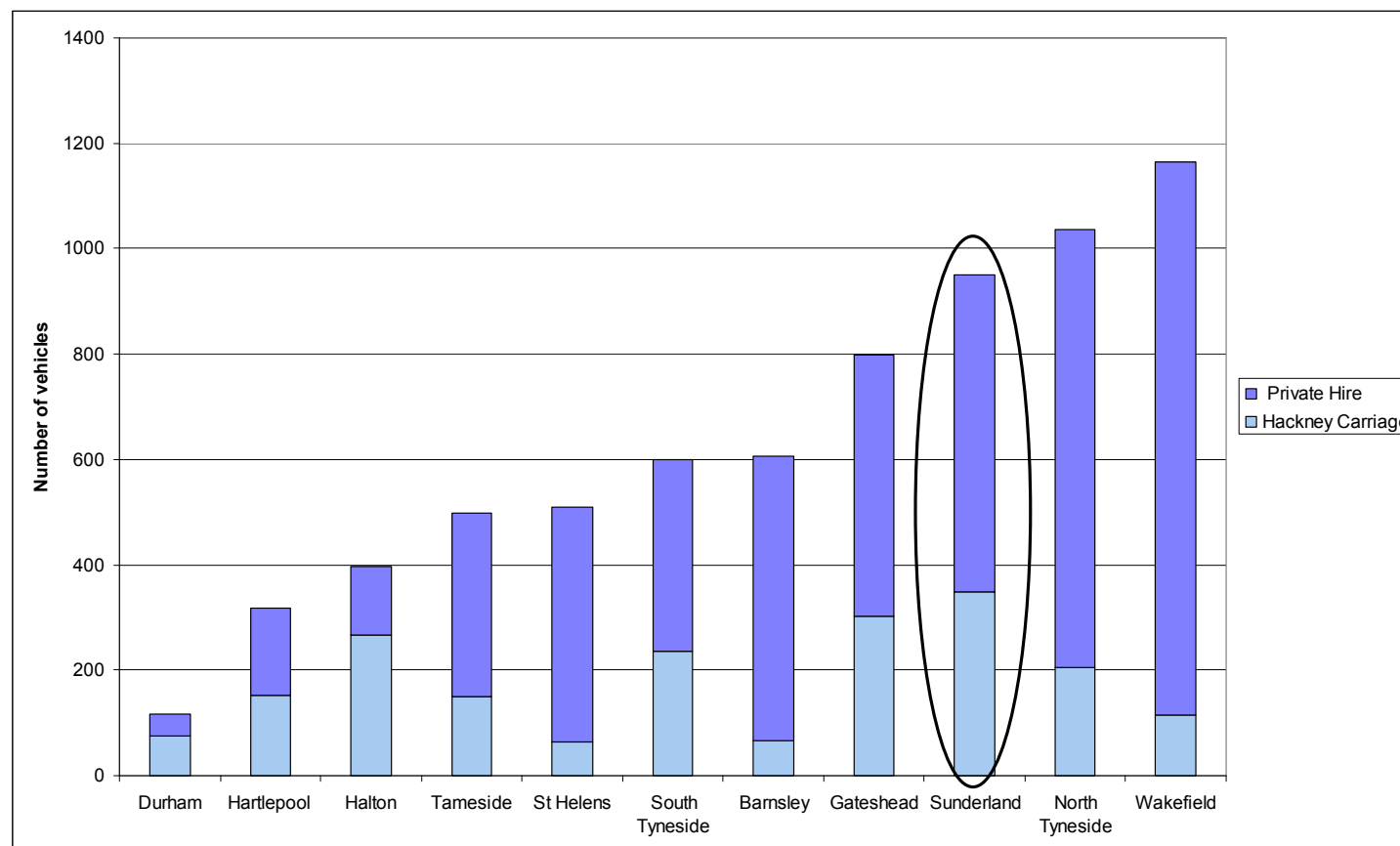
**Figure 3.1**      **Fleet Composition**

Figure 3.2

Population per hackney across the different licensing authorities

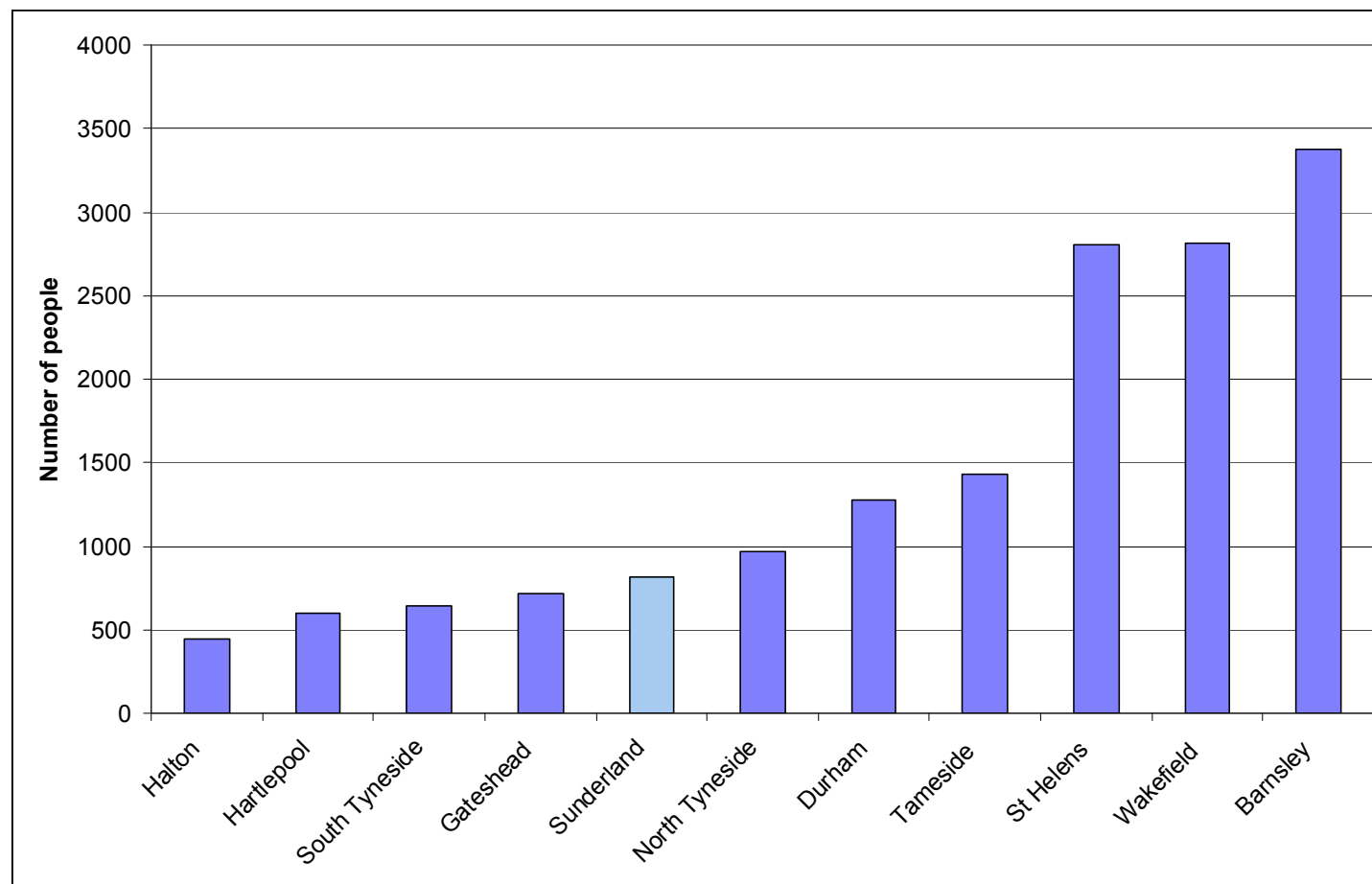
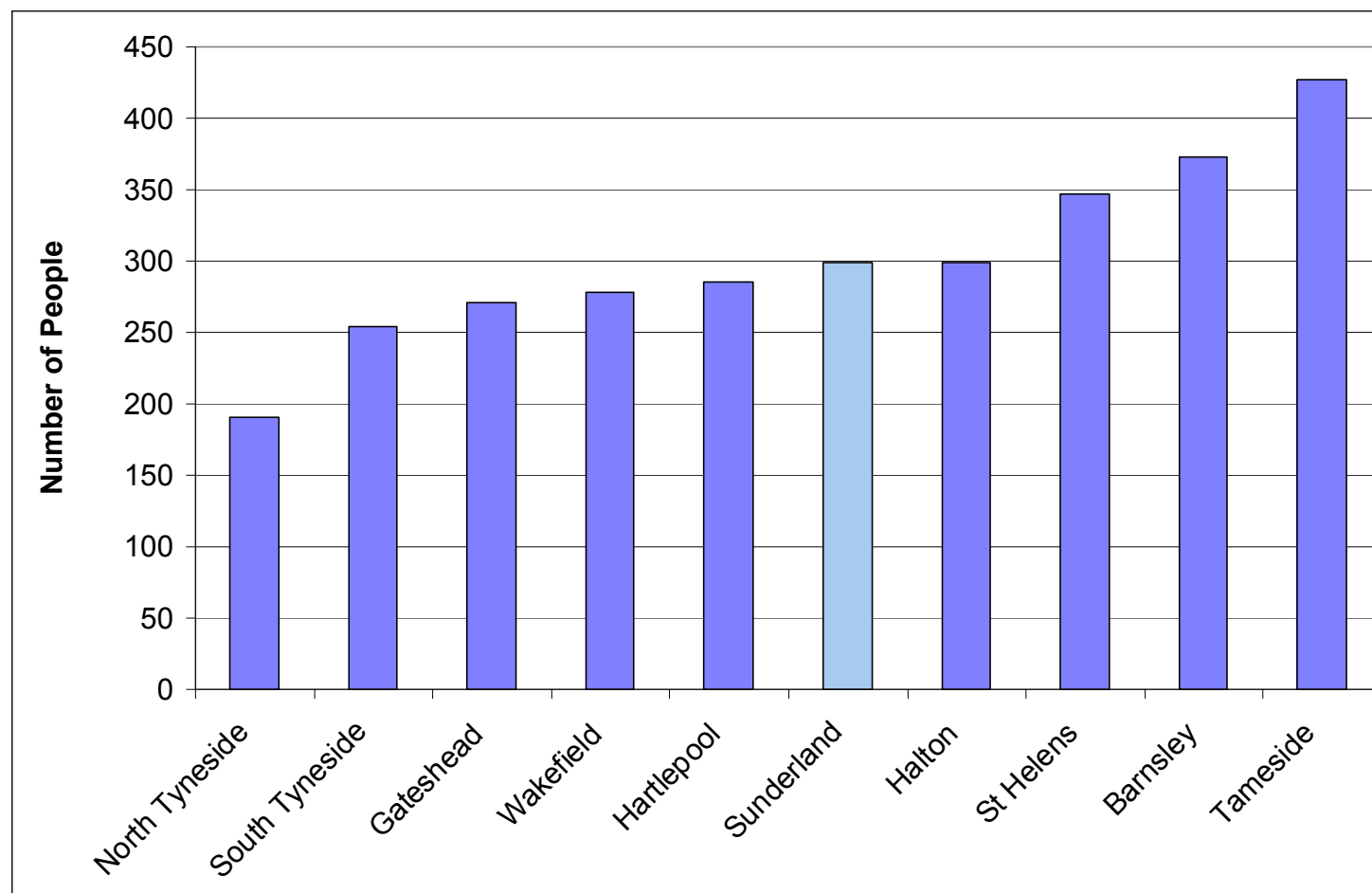


Figure 3.3 Fleet provision per capita



### 3.3 Entry Control

Table 3.1 documents the entry control policies for the 11 authorities. The majority of the authorities highlighted below impose a limit on the number of hackney carriage licences. Gateshead, Durham and Hartlepool are among the only authorities mentioned that do not enforce a policy of numerical control.

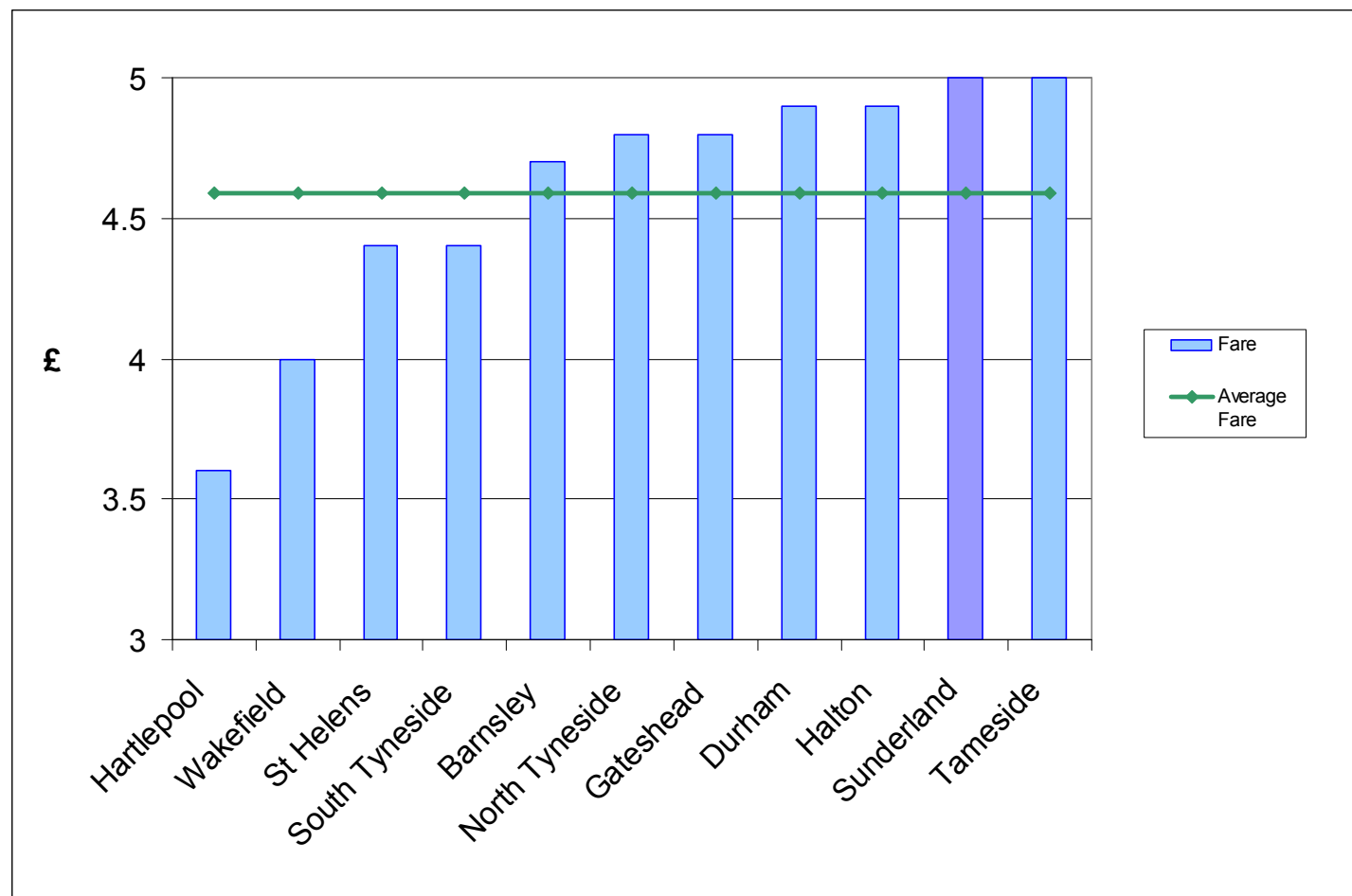
**Table 3.1 Entry Control Policy for the Authorities**

Authority	Control Policy
Barnsley	Restricted
Durham	Derestricted
Gateshead	Derestricted
Halton	Derestricted
Hartlepool	Derestricted
North Tyneside	Restricted
South Tyneside	Restricted
Sunderland	Restricted
St Helen's	Restricted
Tameside	Restricted
Wakefield	Restricted

### 3.4 Fares

Figure 3.4 details the average fare for a two mile journey across the statistically neighbouring authorities. The average cost of a two mile journey is £4.59, thereby highlighting that fares in Sunderland are slightly more expensive than the average at £5.00.

Figure 3.4 Cost of a two mile journey



## **4 Definition, Measurement and Removal of Significant Unmet Demand**

### **4.1 Introduction**

Section 4 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. This method has been applied to numerous local authorities and have been tested in the courts as a way of determining if there is unmet demand for Hackney Carriages.

### **4.2 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.

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).

### **4.3 Defining Significant Unmet Demand**

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.

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).

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.

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

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

If demand remained at a constant level throughout the day and week, the identification and treatment of significant unmet demand would be more straightforward. 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.

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.

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.

#### **4.4 Measuring Patent Significant Unmet Demand**

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.

The broad interpretation to be given to the results of this comparison are summarised in Table 4.1.



**Table 4.1 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:		
<b>Highly Peaked</b>	No SUD	Possibly a SUD
<b>Not Highly Peaked</b>	Possibly a SUD	Possibly a SUD

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.

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.

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 in minutes.
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.

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

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.

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

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.

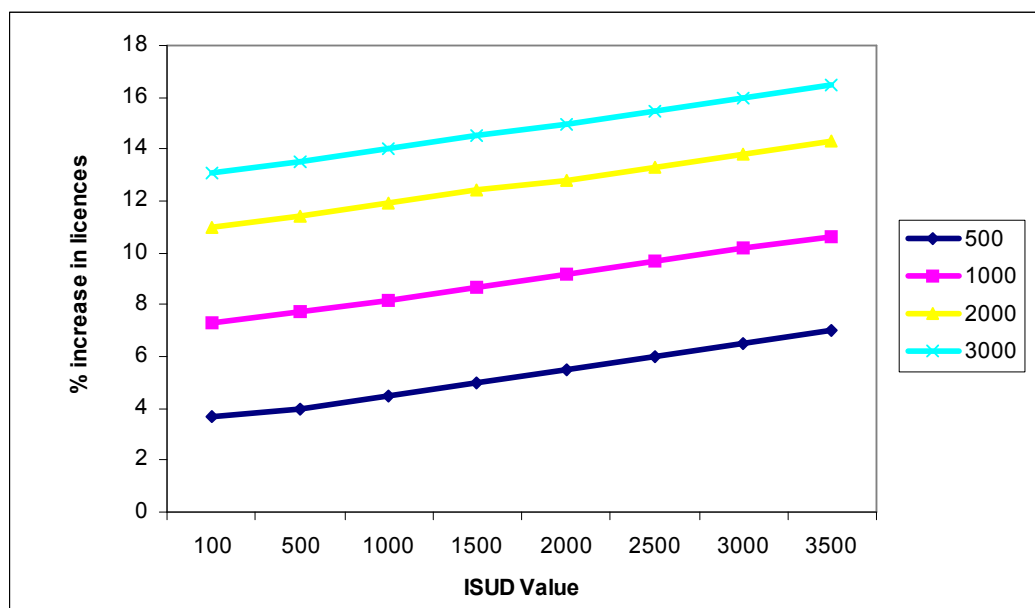
SUDSIM represents a synthesis of a queue simulation work that was previously used (1989 to 2002) to predict the alleviation of significant unmet demand and the ISUD factor described above (hence the term SUDSIM). The benefit of this approach is that it provides a direct relationship between the scale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

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

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

The main implications of the model are illustrated in Figure 4.1 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 4-1: Forecast Increase in Hackney Fleet Size as a Function of Population Per Hackney (PPH) and the ISUD Value



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)

#### **4.6 Note on Scope of Assessing Significant Unmet Demand**

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

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

## **5 SUNDERLAND ZONE – Evidence of Patent Unmet Demand – Rank Observation Results**

### **5.1 Introduction**

This section of the report highlights the results of the rank observation survey. The rank observation programme covered a period of 120 hours across the Sunderland zone during May and June 2011<sup>2</sup>. Some 11,882 passengers and 9,630 cab departures were recorded. A summary of the rank observation programme is provided in Appendix 1.

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**

The results of the analysis are presented in Table 5.1 below. The predominant market state is one of equilibrium. Excess supply (queues of cabs) was experienced during 40% of the hours observed while excess demand (queues of passengers) was experienced 9% of the hours observed. Conditions are favourable to customers at all times of day with the most favourable time being the weekday and week night periods.

The situation has stayed broadly the same since the last survey conducted in 2008.

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<sup>2</sup> Observations were not undertaken during the events held at the Stadium of Light

**Table 5.1 The Balance of Supply and Demand in the Sunderland Rank-Based Hackney Carriage Market (Percentage of hours observed)**

Period		Excess Demand (Maximum Passenger Queue $\geq 3$ )	Equilibrium	Excess Supply (Minimum Cab Queue $\geq 3$ )
Weekday	Day	0	13	87
	Night	0	55	45
Weekend	Day	0	81	19
	Night	27	55	18
Sunday	Day	8	67	25
<b>Total 2011</b>		<b>9</b>	<b>51</b>	<b>40</b>
<b>2008</b>		<b>9</b>	<b>48</b>	<b>43</b>

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

### 5.3 Average Delays and Total Demand

The following estimates of average delays and throughput were produced for each of the main ranks in Sunderland (Table 5.2).

The survey suggests some 11,882 passenger departures occur per week from ranks in Sunderland involving some 9,630 cab departures<sup>3</sup>.

The night-time hackney carriage trade is somewhat concentrated at the rank on Green Terrace accounting for 42.2% of the total. On average cabs wait 14.76 minutes for a passenger and the longest waiting time was at Park Lane opposite the interchange where taxis waited on average 40.62 minutes for a customer.

On average passengers wait 0.88 minutes for a cab. The longest average passenger delay was observed at Green Terrace, where passengers waited on average 1.75 minutes.

The results from the 2008 survey have been added to the table. It shows that passenger departures have increased by 8%. However it appears that this increase is predominantly generated by the Green Terrace and Park Lane (Chase nightclub) ranks i.e the night time economy. Passenger delay has also increased slightly.

<sup>3</sup> A small number of cab departures by vehicles not licensed as hackney carriages within the Sunderland Zone were recorded during the observations. This accounted for 1.1% of total observed cab departures. These departures are included within the analysis of significant unmet demand for completeness as “inappropriately met” hackney demand (see Section 4.3) as we are unable to prove these are legitimate telephone bookings.

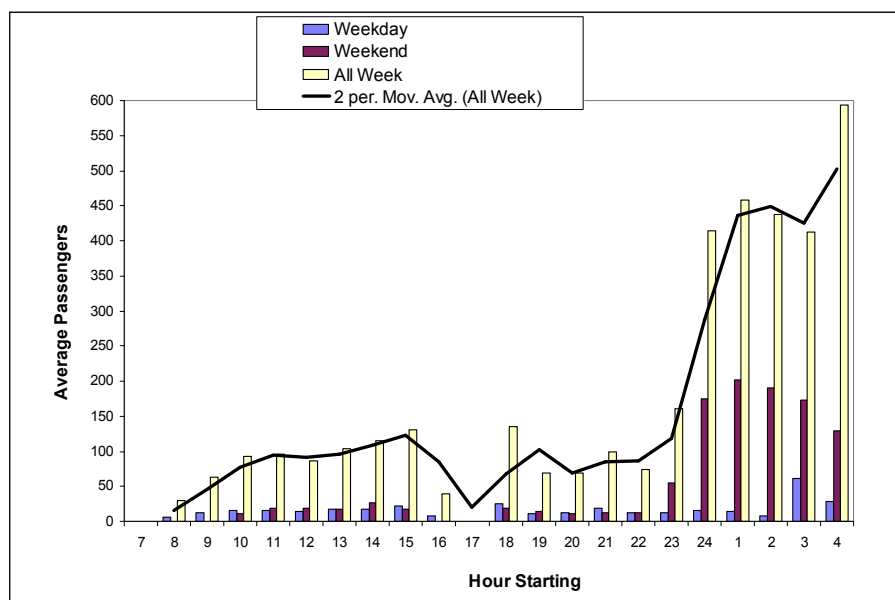
**Table 5.2**                      **Average Delays and Total Demand (Delays in Minutes i.e. 0.22 minutes is 13.2 seconds)**

Rank	Passenger Departures	Cab Departures	Average Passenger Delay in minutes	Average Cab Delay in minutes
Athenaeum Street	2,400	1,748	0.00	26.65
Park Lane (opp interchange)	1,692	1,352	0.00	40.62
Union Street	678	1,233	0.00	14.54
Green Terrace	5,019	3,993	1.75	3.65
Park Lane (Chase Nightclub)	1,976	1,195	0.81	6.42
West Street	117	108	0.38	3.96
<b>Total 2011</b>	<b>11,882</b>	<b>9,630</b>	<b>0.88</b>	<b>14.76</b>
<b>2008</b>	<b>10,976</b>	<b>7,476</b>	<b>0.23</b>	<b>18.76</b>

#### 5.4 The Delay / Demand Profile

Figure 5.1 provides a graphical illustration of passenger demand for the Monday to Saturday period between the hours of 09:00 and 05:00.

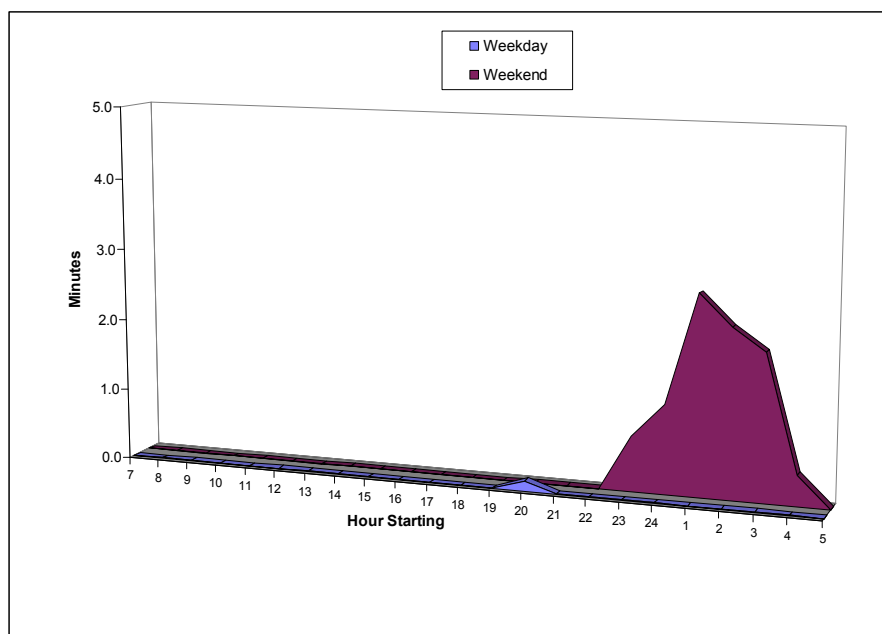
**Figure 5.1**                      **Passenger Demand by Time of Day in 2011 (Monday to Saturday)**



The profile of demand shows a peak in demand late at night between midnight and 5:00am. We therefore conclude that this is a 'highly peaked' demand profile. This has implications for the interpretation of the results (see Chapter 11 below).

Figure 5.2 provides an illustration of passenger delay by the time of day for the weekday and weekend periods. It shows that there is passenger delay on a weekend where delay peaks to 2.77 minutes at 1:00am.

**Figure 5.2** Passenger Delay by Time of Day in 2011 (Monday to Saturday)



## 5.5 The General Incidence of Passenger Delay

The rank observation data can be used to provide a simple assessment of the likelihood of passengers encountering delay at ranks. The results are presented in table 5.3 below.

**Table 5.3** General Incidence of Passenger Delay (percentage of Passengers travelling in hours where delay exceeds one minute)

Year	Delay > 0	Delay > 1 minute	Delay > 5 minutes
2011	15.20	11.13	0.01

In 2011 the proportion likely to experience more than a minute of delay is 11.13%, showing little incidences of passenger delay. It is this proportion that is used within the ISUD as the 'Generality of Passenger Delay'.

## 5.6 The Effective Supply of Vehicles

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.



During the daytime period (0700 to 1800) some 147 (51.8%) of the hackney fleet were observed at least once during the period of the study. During the evening/night-time period (1800 to 0700) some 246 (86.3%) of the hackney fleet were also observed at least once during the rank observations. In total 93.7% of the trade was observed at least once.

## **5.7 Comparing the results for Sunderland with those of other unmet demand studies**

Comparable statistics are available from 56 local authorities that Halcrow have recently conducted studies in and these are listed in Table 5.4. The table highlights a number of key results including:

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

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

- population per hackney carriage is lower than the average overall value i.e. provision is higher;
- the proportion of passengers who travel in hours where some delay occurs, is 15.2%, which is much lower than the average (24%) for the districts analysed;
- overall average passenger delay at 0.88 minutes is lower than the average value;
- overall average cab delay at 14.76 minutes is higher than the average for the districts shown; and
- the proportion of weekday daytime hours with excess demand conditions is below the average of 7%.

<b>District and Year of Survey</b>	<b>Population per Hackney</b>	<b>Proportion Waiting at Ranks</b>	<b>Proportion Waiting &gt;= 1 Min</b>	<b>Proportion Waiting &gt;= 5 Mins</b>	<b>Average Passenger Delay</b>	<b>Average Cab Delay</b>	<b>% Excess Demand</b>	<b>Demand Peaked, Yes=0.5 No=1</b>	<b>ISUD Indicator Value</b>
<b>Sunderland 2011</b>	<b>813</b>	<b>15.2</b>	<b>11.13</b>	<b>0.01</b>	<b>0.88</b>	<b>14.76</b>	<b>0</b>	<b>0.5</b>	<b>0</b>
Liverpool 2011	308	5.06	2.13	0.37	0.14	20.64	1	1	0
Crawley 11	924	5.76	6.28	0.64	0.18	21.88	5	1	6
Sefton 10	1,015	7.36	4.25	0.55	0.38	19.15	4	0.5	2
West Berkshire 10 *	741	5.44	3.84	0.92	0.37	22.78	3	0.5	6.26
Pendle 10	1,257	0.54	0.03	0.03	0.03	33.1	0	0.5	0
Basingstoke & Deane 2010	2,990	13.31	8.42	1.68	0.88	9.43	14	1	108
Oxford 09	1,266	9.91	3.08	0.07	0.24	10.43	5	1	4
Brighton & Hove 09	474	10.84	5.67	1.19	0.72	8.91	7	0.5	16.2
Leicester 09	880	10.1	9.53	2.58	1.52	19.02	0	1	0
Blackpool 09	556	4	1	0	0.05	18.96	2	0.5	1
Hull 09	1,465	12.15	8.54	0.99	1.72	9.34	2	0.5	18
Rochdale 09	1,937	3.1	1.18	0	0.14	12.92	5	1	1
North Tyneside 08	971	15.68	1.18	0.03	0.38	10.72	8	0.5	2
Rotherham 08	5,192	0.09	0.09	0	0.01	27.29	0	1	0
Preston 08	677	11.85	5.28	0	0.61	11.13	7	1.0	21
Scarborough 08	1,111	11.75	5	1.06	0.49	7.74	7	0.5	0
York 08	1,146	31	11.5	6.74	3.21	5.42	31	0.5	645
Barrow 08	474	13.97	12.52	0	0.5	6.85	0	0.5	0
Stirling 08	1,265	25	18	0.3	0.7	10.94	2	0.5	38
Torridge 08	1,202	7	0.94	0	0.12	14.99	0	1	0
Richmondshire 08	723	5	1	0.07	0.22	34.32	1	0.5	0.4
Exeter 07/08	1,883	7	4	0.6	0.33	15.27	6	1	9
Manchester 07	394	21	6	2.28	1.59	10.24	14	1	174
Bradford 07	1,630	18	2	0.03	0.23	17.64	5	1	2
Barnsley 07	3,254	5	8	0.22	1.32	11.93	5	1	58
Blackpool 06	556	31	10	0.34	0.42	10.34	5	0.5	11
Broadstairs 06	1,000	13	13	10	3.25	23.97	4	1	177
Margate 06	1,622	4	1	0	0.05	33.14	0	1	0
Ramsgate 06	1,026	2	2	2	0.49	19.57	13	1	13
Plymouth 06	669	7	3	1	0.52	11.58	1	1	2
Brighton 06	508	52	23	6	0.73	7.64	6	0.5	50
Thurrock 06	1,590	32	13	1	0.22	15.27	0	1	0
Trafford 06	2,039	55	38	6	1.09	13.15	5	1	249
Leicester05	880	21	11	1	0.35	19.36	3	1	12
Bournemouth 05	656	20	11	2	0.37	12.25	1	0.5	2
Bradford 03	2,171	19	6	0.77	0.25	14.89	6	1.0	9
Oldham 03	2,558	30	12	0.79	0.48	14.8	7	1.0	40
Thurrock 03	1,607	43	14	1.01	0.50	12.5	2	1.0	14
Blackpool 03	556	21	4	0.3	0.13	12.4	6	1.0	3
Wolverhampton 03	3,113	50	31	7.39	1.49	11.18	14	1.0	647
Bournemouth 02	702	25	15	2	0.67	9.97	1	0.5	5
Brighton 02	540	60	35	12	1.11	8.31	5	0.5	97
Exeter 02	2,353	47	18	3	0.71	10.12	20	1.0	256
Wigan 02	2,279	28	10	0	1.17	11.98	6	1.0	70
Cardiff 01	656	51	29	6	0.83	8.77	14	0.5	168
Edinburgh 01	373	47	29	9	1.27	8.77	13	1.0	479
Torridge 01	1,298	25	21	0	0.51	9.32	8	0.5	43
Worcester 01*	941	40	4	1	0.46	12.3	8	0.5	7
Ellesmere Port 01	2,527	80	48	17	2.49	4.23	49	0.5	2,928
Southend 00	895	46	29	8	1.92	8.08	4	1.0	223
South Ribble 00 *	485	12	0.25	0.25	0.07	11.27	0	1.0	0
Leeds 00	1,693	83	61	33	5.03	7.92	36	1.0	11,046
Sefton 00	1,069	18	8	0.6	0.28	12.95	6	1.0	13
Leicester 00 *	956	10	7	3	1.17	20.19	1	1.0	8
Castle Point 00	2,286	28	12	3	0.74	8.6	2	0.5	9
Bedford 00	2,931	25	15	10	0.86	6.86	4	1.0	52
Thurrock 00	1,406	28	14	2	0.63	10.66	6	1.0	53
<b>AVERAGE</b>	<b>1,340</b>	<b>24</b>	<b>12</b>	<b>3</b>	<b>1</b>	<b>14</b>	<b>7</b>		

## 6 Evidence of Suppressed Demand - Public Attitude Pedestrian Survey Results

### 6.1 Introduction

A public attitude interview survey was designed with the aim of collecting information regarding opinions on the taxi market in the Sunderland zone. In particular, the survey allowed an assessment of flagdown, telephone and rank delays, the satisfaction with delays and general use information.

Some 262 on-street public attitude surveys were carried out in July 2011. The surveys were conducted across a range of locations within the Sunderland zone, including the city centre and university. 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. It should be noted that in the tables and figures 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.

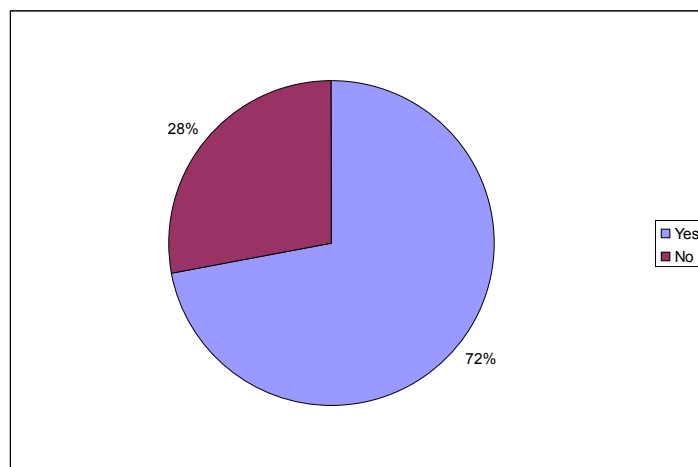
A full breakdown and analysis of the results are provided in Appendix 2.

### 6.2 General Information

To establish whether respondents were aware of the difference between hackney carriages and private hire vehicles, they were asked whether they thought the statement “All taxis are allowed to pick up in the street or at a rank” was true or false. The survey identified that 70.3% of respondents did not know the difference between hackney carriages and private hire vehicles.

Respondents were asked whether they had made a trip by taxi during the last three months. The survey found that some 72% had used a taxi within this period. The results are displayed in Figure 6.1.

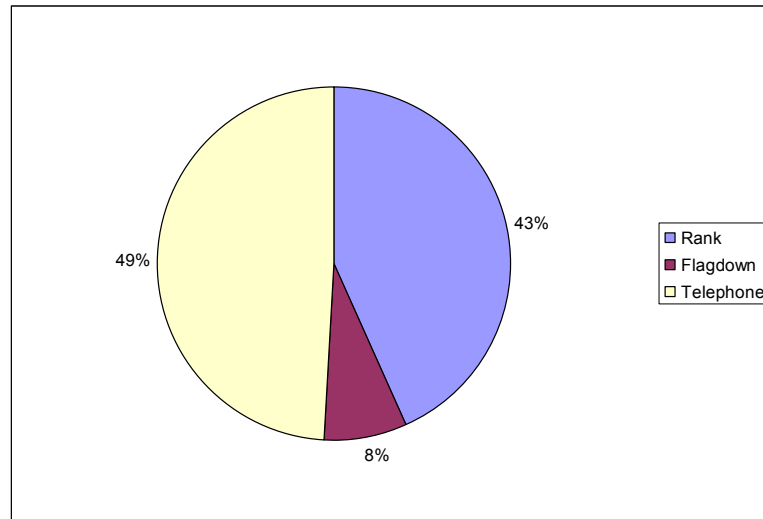
**Figure 6.1** Have you made a trip by hackney carriage or private hire vehicle in the last 3 months?



### 6.3 Characteristics of Last Trip by Hackney or Private Hire Vehicle

Trip makers were asked how they obtained their hackney carriage or private hire vehicle. Some 43% of trip makers stated that they hired their taxi at a rank. Some 49% of hirings were achieved by telephone, with 8% of trip makers obtaining a taxi by on-street flagdown. Figure 6.2 reveals the pattern of taxi hire.

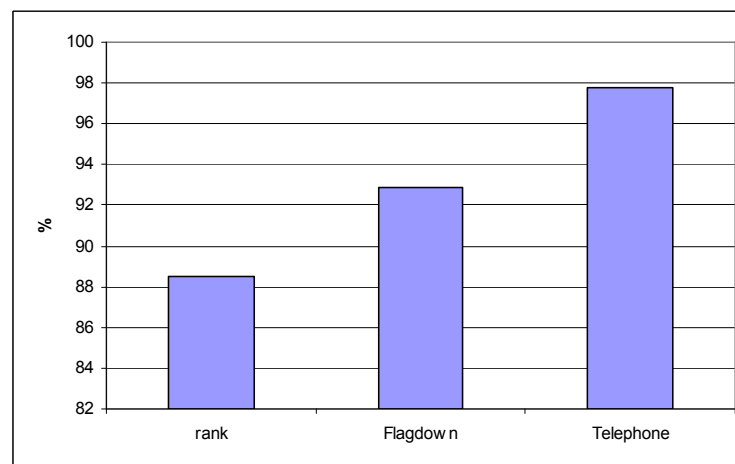
**Figure 6.2** Method of hire for last trip



The most common type of vehicle used was a saloon car (90.1%) with 6% of respondents hiring a purpose built cab and 3.9% stating 'other'.

Respondents were asked if they were satisfied with the time taken and the promptness of the vehicle's arrival. The majority of people were satisfied with their last taxi journey (96.3%). Figure 6.3 shows that for each method of obtaining a vehicle, the majority were satisfied with the length of time they had to wait for a vehicle. Those obtaining their vehicle by telephone had the highest level of satisfaction (97.8%).

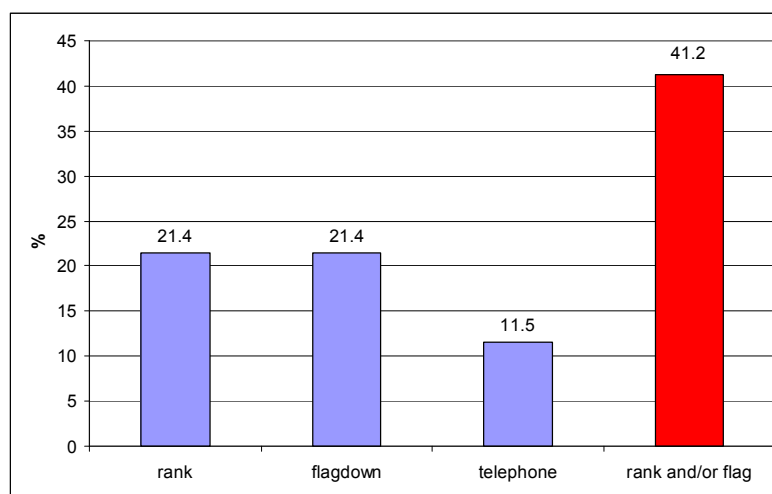
**Figure 6.3** Satisfaction with Delay on Last Trip by Method of Hire



## 6.4 Attempted Method of Hire

In order to measure demand suppression, respondents were asked to identify whether or not they had given up waiting for a hackney or private hire vehicle at a rank, on the street or by telephone in the Sunderland zone within the last three months. The results are documented in figure 6.4

**Figure 6.4** Latent demand by method of hire – given up trying to make a hiring?



As indicated in figure 6.4 some 41.2% of respondents had given up waiting for a hackney at a rank and/or flagdown in the last three months. This has implications for the interpretation of the results (see Chapter 11 below).

Respondents who had given up trying to obtain a taxi in the last three months were asked the location where they had given up waiting for a taxi. The most common areas were Sunderland University, Glass Spider (i.e. Green Terrace) and Sunderland Rail Station.

Respondents were also asked what type of vehicle they required when they gave up waiting. Some 37.5% did not have a preference and a further 37.5% required a saloon car.

## 6.5 Service Provision

Respondents were told that Sunderland City Council currently enforces a numerical limit of 284 on the number of hackney carriage licences in the Sunderland zone. They were asked whether they were aware of this. Some 83.1% were unaware of the numerical limit.

The survey asked respondents whether taxi services in Sunderland could be improved. Some 61.5% felt that they could be improved. Figure 6.5 shows the type of improvements that respondents would like to see.

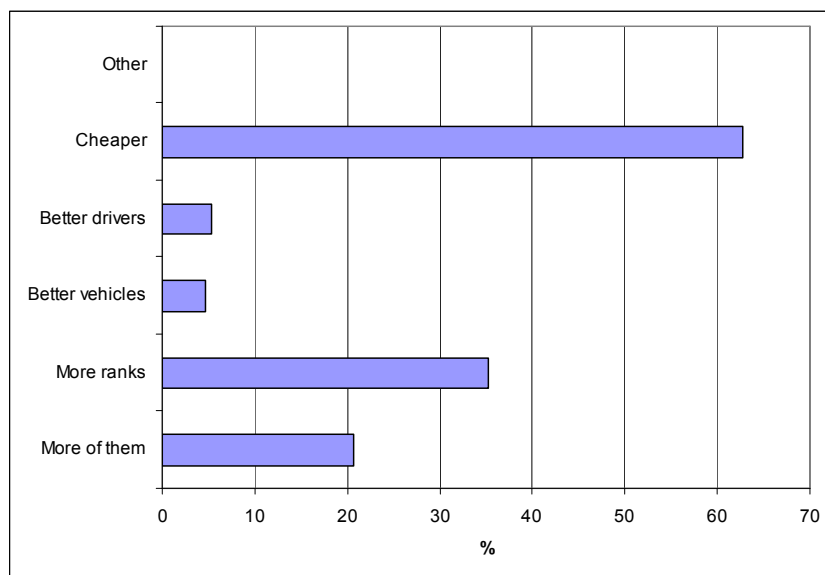
**Figure 6.5** How could be services be improved?

Figure 6.5 indicates that the majority of respondents 62.7% felt taxi services could be improved if they were cheaper.

## 6.6 Safety and Security

Respondents were asked whether they felt safe when using hackney and private hire vehicles in Sunderland. The majority of respondents felt safe using them during the day (98.1%) and the night (92.7%) in Sunderland. Those respondents who stated that they do not feel safe using taxis, either during the day or at night, were asked what could be done to improve safety and security of using taxis in Sunderland. The results show that 63.2% would feel safer with CCTV in the taxis and 47.4% would feel safer with female drivers.

## 6.7 Ranks

Respondents were asked if there were any locations in Sunderland where new ranks were needed. Over half of respondents (63%) commented that no new ranks are required where as 9.4% stated new ranks are needed and 27.6% did not know.

Those respondents who felt new ranks are required in Sunderland were subsequently asked to provide a location;

- Sunderland University (50%)
- Generally in the City Centre (16.7%)
- Pallion (8.3%)

## 6.8 Summary

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

- Some 72% of respondents in Sunderland had used a hackney or private hire vehicle in the last three months
- Some 43.3% of trip makers hired their taxi at a rank, whilst 49.2% hired their taxi by telephone and 7.5% of trip makers obtained a taxi by on-street flagdown
- High levels of satisfaction with delay on last trip were recorded for each method of hire
- Majority of respondents had not given up waiting for a hackney or private hire vehicle in the last three months with 41.2% stating they had given up trying to obtain a vehicle by rank and/or flagdown in Sunderland
- The majority of respondents felt safe using taxis during the day (98.1%) and at night (92.7%) in Sunderland

## **7 HETTON, HOUGHTON AND WASHINGTON ZONE – Evidence of Patent Unmet Demand – Rank Observation Results**

### **7.1 Introduction**

This section of the report highlights the results of the rank observation survey. The rank observation programme covered a period of 70 hours across the Hetton, Houghton and Washington zone during May and June 2011. Some 4,279 passengers and 3,036 cab departures were recorded. A summary of the rank observation programme is provided in Appendix 3.

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.

### **7.2 The Balance of Supply and Demand**

The results of the analysis are presented in Table 7.1 below. The predominant market state is one of equilibrium. Excess supply (queues of cabs) was experienced during 25% of the hours observed while excess demand (queues of passengers) was experienced 3% of the hours observed. Conditions are favourable to customers at all times of day with the most favourable time being the weekday and week night periods.



**Table 7.1 The Balance of Supply and Demand in the Hetton, Houghton and Washington zone Rank-Based Hackney Carriage Market (Percentage of hours observed)**

Period		Excess Demand (Maximum Passenger Queue $\geq 3$ )	Equilibrium	Excess Supply (Minimum Cab Queue $\geq 3$ )
Weekday	Day	0	50	50
	Night	0	100	0
Weekend	Day	8	50	42
	Night	7	93	0
Sunday	Day	0	50	50
<b>Total 2011</b>		<b>3</b>	<b>72</b>	<b>25</b>
<b>2008</b>		<b>3</b>	<b>71</b>	<b>26</b>

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

### 7.3 Average Delays and Total Demand

The following estimates of average delays and throughput were produced for each of the main ranks in the Hetton, Houghton and Washington zone. (Table 7.2).

The survey suggests some 4,279 passenger departures occur per week from ranks in Hetton, Houghton and Washington involving some 3,036 cab departures.<sup>4</sup>

The taxi trade is somewhat concentrated at the rank at ASDA in Washington, accounting for 40.7% of the total. On average cabs wait 16.79 minutes for a passenger and the longest waiting time was at the Galleries rank where taxis waited on average 26.66 minutes for a customer.

On average passengers wait 0.04 minutes for a cab. The longest passenger delay was observed at the rank in Riverside, Washington, where passengers waited on average 0.28 minutes.

The results are similar to those obtained in 2008. However like the Sunderland zone the number of passenger departures has slightly increased.

<sup>4</sup> A number of cab departures by vehicles not licensed as hackney carriages within the Hetton, Houghton and Washington Zone were recorded during the observations. This accounted for 12.9% of total observed cab departures. These departures are included within the analysis of significant unmet demand for completeness as “inappropriately met” hackney demand (see Section 4.3) as we are unable to prove these are legitimate telephone bookings.

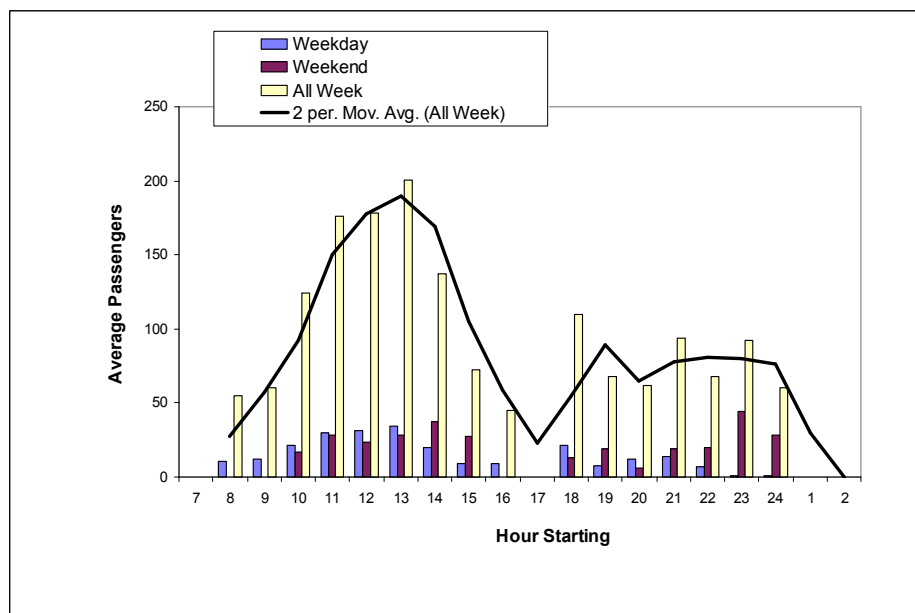
**Table 7.2** Average Delays and Total Demand (Delays in Minutes i.e. 0.22 minutes is 13.2 seconds)

Rank	Passenger Departures	Cab Departures	Average Passenger Delay in minutes	Average Cab Delay in minutes
ASDA Washington	2,597	2,002	0.00	13.71
In Shops The Galleries	932	667	0.03	26.66
Riverside, Washington	531	252	0.28	16.49
Spout Lane	220	115	0.00	13.75
<b>Total 2011</b>	<b>4,279</b>	<b>3,036</b>	<b>0.04</b>	<b>16.79</b>
<b>2008</b>	<b>3,672</b>	<b>2,868</b>	<b>0.12</b>	<b>15.16</b>

#### 7.4 The Delay / Demand Profile

Figure 7.1 provides a graphical illustration of passenger demand for the Monday to Saturday period between the hours of 09:00 and 03:00.

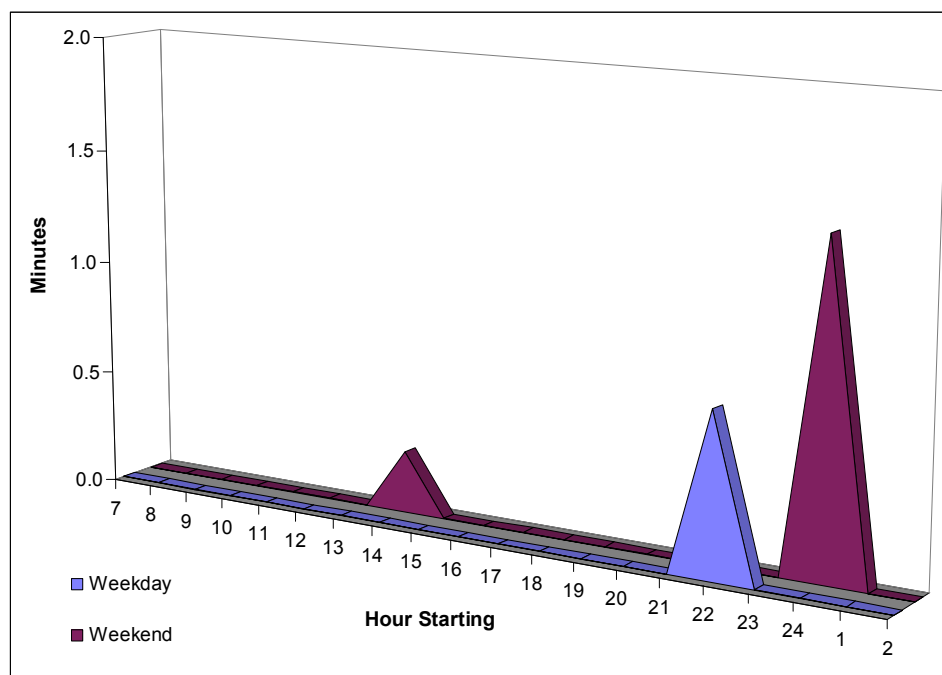
**Figure 7.1** Passenger Demand by Time of Day in 2011 (Monday to Saturday)



The profile of demand shows a peak in demand at 13:00. There is no peak late at night so we therefore conclude that this is not a 'highly peaked' demand profile. This has implications for the interpretation of the results (see Chapter 11 below).

Figure 7.2 provides an illustration of passenger delay by the time of day for the weekday and weekend periods. It shows that there is passenger delay on a weekend night where delay peaks to 1.43 minutes at midnight.

**Figure 7.2** Passenger Delay by Time of Day in 2011 (Monday to Saturday)



## 7.5 The General Incidence of Passenger Delay

The rank observation data can be used to provide a simple assessment of the likelihood of passengers encountering delay at ranks. The results are presented in table 7.3 below.

**Table 7.3** General Incidence of Passenger Delay (percentage of Passengers travelling in hours where delay exceeds one minute)

Year	Delay > 0	Delay > 1 minute	Delay > 5 minutes
2011	1.37	0.65	0.00

In 2011 the proportion likely to experience more than a minute of delay is 0.65%, showing very little incidences of passenger delay. It is this proportion that is used within the ISUD as the 'Generality of Passenger Delay'.

## 7.6 The Effective Supply of Vehicles

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.

During the daytime period (0700 to 1800) some 53 (81.5%) of the hackney fleet were observed at least once during the period of the study. During the evening/night-time period (1800 to 0700) some 31 (47.7%) of the hackney fleet were also observed at least once during the rank observations. In total 89.2% of the trade was observed at least once.

## 7.7 Comparing the results for Hetton, Houghton and Washington, with those of other unmet demand studies

Comparable statistics are available from 56 local authorities that Halcrow have recently conducted studies in and these are listed in Table 7.4. The table highlights a number of key results including:

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

The following points (obtained from the rank observations) may be made about the results in, Hetton, Houghton and Washington compared to other areas studied:

- population per hackney carriage is lower than the average overall value i.e. provision is higher;
- the proportion of passengers, who travel in hours where some delay occurs, is just 1.37%, which is much lower than the average (23%) for the districts analysed;
- overall average passenger delay at 0.04 minutes is lower than the average value;
- overall average cab delay at 16.79 minutes is higher than the average for the districts shown; and
- the proportion of weekday daytime hours with excess demand conditions are observed is below the average of 7%.

District and Year of Survey	Population per Hackney	Proportion Waiting at Ranks	Proportion Waiting >= 1 Min	Proportion Waiting >= 5 Mins	Average Passenger Delay	Average Cab Delay	% Excess Demand	Demand Peaked, Yes=0.5 No=1	ISUD Indicator Value
Hetton/Houghton/Washington	813	1.37	0.65	0	0.04	16.79	0	1	0
<b>Sunderland 2011</b>	<b>813</b>	<b>15.2</b>	<b>11.13</b>	<b>0.01</b>	<b>0.88</b>	<b>14.76</b>	<b>0</b>	<b>0.5</b>	<b>0</b>
Liverpool 2011	308	5.06	2.13	0.37	0.14	20.64	1	1	0
Crawley 11	924	5.76	6.28	0.64	0.18	21.88	5	1	6
Sefton 10	1,015	7.36	4.25	0.55	0.38	19.15	4	0.5	2
West Berkshire 10 *	741	5.44	3.84	0.92	0.37	22.78	3	0.5	6.26
Pendle 10	1,257	0.54	0.03	0.03	0.03	33.1	0	0.5	0
Basingstoke & Deane 2010	2,990	13.31	8.42	1.68	0.88	9.43	14	1	108
Oxford 09	1,266	9.91	3.08	0.07	0.24	10.43	5	1	4
Brighton & Hove 09	474	10.84	5.67	1.19	0.72	8.91	7	0.5	16.2
Leicester 09	880	10.1	9.53	2.58	1.52	19.02	0	1	0
Blackpool 09	556	4	1	0	0.05	18.96	2	0.5	1
Hull 09	1,465	12.15	8.54	0.99	1.72	9.34	2	0.5	18
Rochdale 09	1,937	3.1	1.18	0	0.14	12.92	5	1	1
North Tyneside 08	971	15.68	1.18	0.03	0.38	10.72	8	0.5	2
Rotherham 08	5,192	0.09	0.09	0	0.01	27.29	0	1	0
Preston 08	677	11.85	5.28	0	0.61	11.13	7	1.0	21
Scarborough 08	1,111	11.75	5	1.06	0.49	7.74	7	0.5	0
York 08	1,146	31	11.5	6.74	3.21	5.42	31	0.5	645
Barrow 08	474	13.97	12.52	0	0.5	6.85	0	0.5	0
Stirling 08	1,265	25	18	0.3	0.7	10.94	2	0.5	38
Torridge 08	1,202	7	0.94	0	0.12	14.99	0	1	0
Richmondshire 08	723	5	1	0.07	0.22	34.32	1	0.5	0.4
Exeter 07/08	1,883	7	4	0.6	0.33	15.27	6	1	9
Manchester 07	394	21	6	2.28	1.59	10.24	14	1	174
Bradford 07	1,630	18	2	0.03	0.23	17.64	5	1	2
Barnsley 07	3,254	5	8	0.22	1.32	11.93	5	1	58
Blackpool 06	556	31	10	0.34	0.42	10.34	5	0.5	11
Broadstairs 06	1,000	13	13	10	3.25	23.97	4	1	177
Margate 06	1,622	4	1	0	0.05	33.14	0	1	0
Ramsgate 06	1,026	2	2	2	0.49	19.57	13	1	13
Plymouth 06	669	7	3	1	0.52	11.58	1	1	2
Brighton 06	508	52	23	6	0.73	7.64	6	0.5	50
Thurrock 06	1,590	32	13	1	0.22	15.27	0	1	0
Trafford 06	2,039	55	38	6	1.09	13.15	5	1	249
Leicester05	880	21	11	1	0.35	19.36	3	1	12
Bournemouth 05	656	20	11	2	0.37	12.25	1	0.5	2
Bradford 03	2,171	19	6	0.77	0.25	14.89	6	1.0	9
Oldham 03	2,558	30	12	0.79	0.48	14.8	7	1.0	40
Thurrock 03	1,607	43	14	1.01	0.50	12.5	2	1.0	14
Blackpool 03	556	21	4	0.3	0.13	12.4	6	1.0	3
Wolverhampton 03	3,113	50	31	7.39	1.49	11.18	14	1.0	647
Bournemouth 02	702	25	15	2	0.67	9.97	1	0.5	5
Brighton 02	540	60	35	12	1.11	8.31	5	0.5	97
Exeter 02	2,353	47	18	3	0.71	10.12	20	1.0	256
Wigan 02	2,279	28	10	0	1.17	11.98	6	1.0	70
Cardiff 01	656	51	29	6	0.83	8.77	14	0.5	168
Edinburgh 01	373	47	29	9	1.27	8.77	13	1.0	479
Torridge 01	1,298	25	21	0	0.51	9.32	8	0.5	43
Worcester 01*	941	40	4	1	0.46	12.3	8	0.5	7
Ellesmere Port 01	2,527	80	48	17	2.49	4.23	49	0.5	2,928
Southend 00	895	46	29	8	1.92	8.08	4	1.0	223
South Ribble 00 *	485	12	0.25	0.25	0.07	11.27	0	1.0	0
Leeds 00	1,693	83	61	33	5.03	7.92	36	1.0	11,046
Sefton 00	1,069	18	8	0.6	0.28	12.95	6	1.0	13
Leicester 00 *	956	10	7	3	1.17	20.19	1	1.0	8
Castle Point 00	2,286	28	12	3	0.74	8.6	2	0.5	9
Bedford 00	2,931	25	15	10	0.86	6.86	4	1.0	52
<b>AVERAGE</b>	<b>1,340</b>	<b>24</b>	<b>12</b>	<b>3</b>	<b>1</b>	<b>14</b>	<b>7</b>		

## 8 Evidence of Suppressed Demand - Public Attitude Pedestrian Survey Results

### 8.1 Introduction

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

Some 288 on-street public attitude surveys were carried out in July 2011. The surveys were conducted across a range of locations within the Hetton, Houghton and Washington licensing zone. 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. It should be noted that in the tables and figures 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.

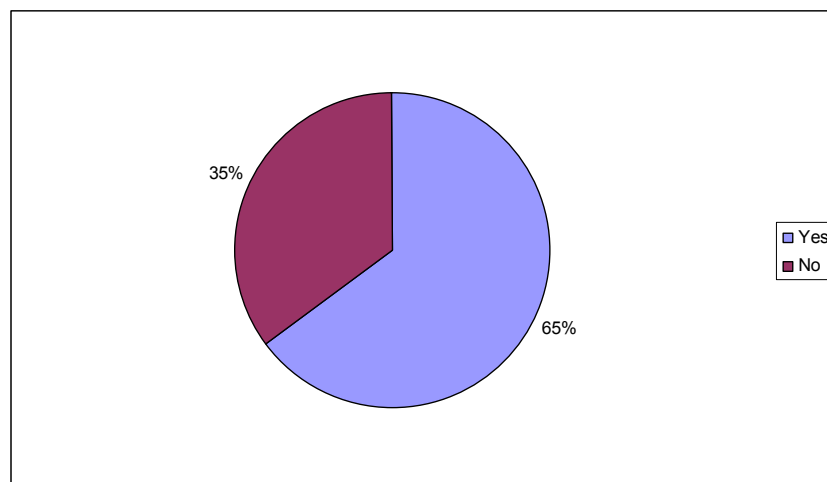
A full breakdown and analysis of the results are provided in Appendix 4.

### 8.2 General Information

To establish whether respondents were aware of the differences between hackney carriages and private hire vehicles, they were asked whether they thought the statement “All taxis are allowed to pick up in the street or at a rank” was true or false. The survey identified that 80.7% of respondents did know the difference between hackney carriages and private hire vehicles.

Respondents were asked whether they had made a trip by taxi during the last three months. The survey found that some 64.7% had used a taxi within this period. The results are displayed in Figure 8.1.

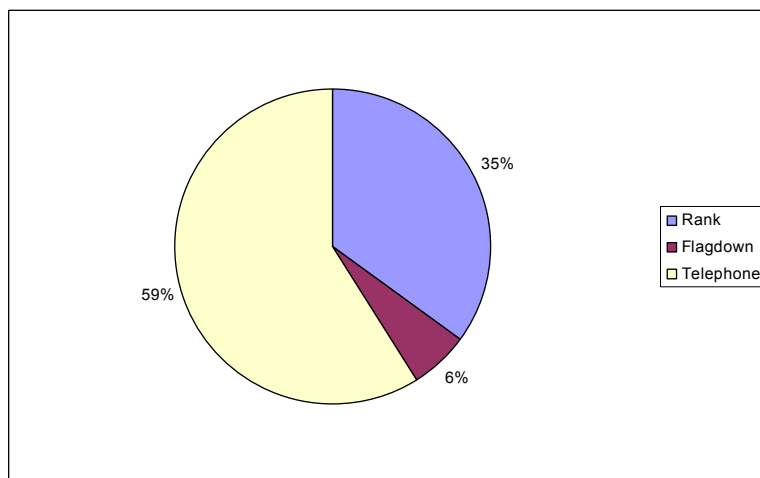
**Figure 8.1** Have you made a trip by hackney carriage or private hire vehicle in the last 3 months?



### 8.3 Characteristics of Last Trip by Hackney or Private Hire Vehicle

Trip makers were asked how they obtained their hackney carriage or private hire vehicle. Some 35.1% of trip makers stated that they hired their taxi at a rank. Some 58.9% of hiring's were achieved by telephone, with 5.9% of trip makers obtaining a taxi by on-street flagdown. Figure 8.2 reveals the pattern of taxi hire.

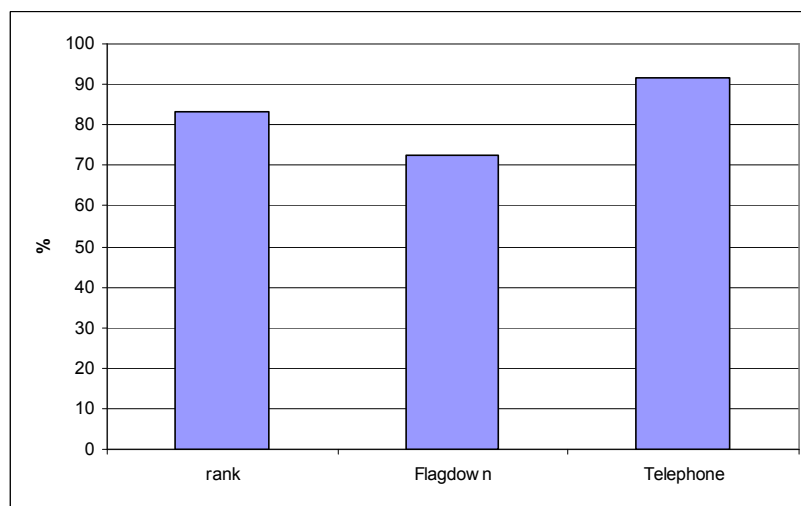
**Figure 8.2** Method of hire for last trip



The most common type of vehicle used was a saloon car (75.6%) with 8% of respondents hiring a purpose built cab and 16.5% stating 'other'.

Respondents were asked if they were satisfied with the time taken and the promptness of the vehicle's arrival. The majority of people were satisfied with their last taxi journey (88%). Figure 8.3 shows that for each method of obtaining a vehicle, the majority were satisfied with the length of time they had to wait for a vehicle. Those obtaining their vehicle by telephone had the highest level of satisfaction (91.8%).

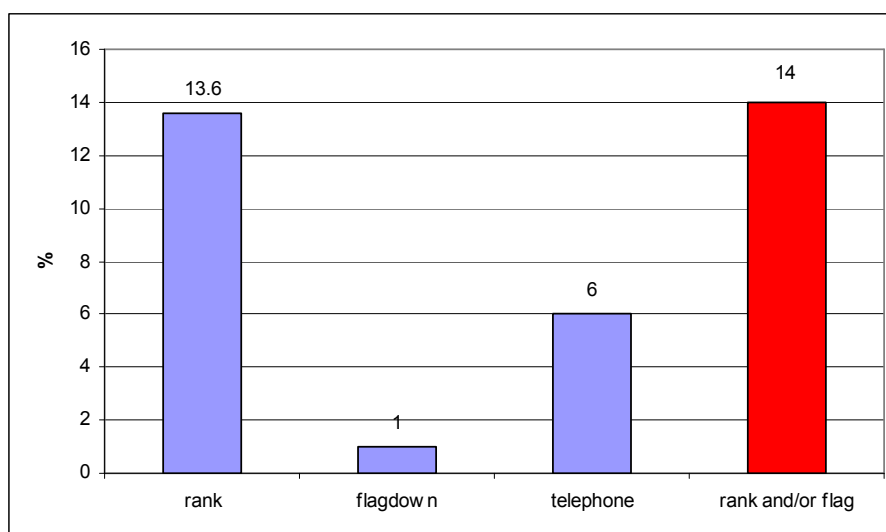
**Figure 8.3** Satisfaction with Delay on Last Trip by Method of Hire



## 8.4 Attempted Method of Hire

In order to measure demand suppression, respondents were asked to identify whether or not they had given up waiting for a hackney or private hire vehicle at a rank, on the street or by telephone in the Hetton, Houghton and Washington zone within the last three months. The results are documented in figure 8.4

**Figure 8.4** Latent demand by method of hire – given up trying to make a hiring?



As indicated in figure 8.4 some 14% of respondents had given up waiting for a hackney at a rank and/or flagdown in the last three months. This has implications for the interpretation of the results (see Chapter 11 below).

Respondents who had given up trying to obtain a taxi in the last three months were asked the location where they had given up waiting for a taxi. The most common areas were Washington and Hetton, however no specific locations were provided.

Respondents were also asked what type of vehicle they required when they gave up waiting. Some 61.7% required a saloon car, 25% did not have a preference and 10% required a vehicle that could fit more than four passengers.

## 8.5 Service Provision

Respondents were told that Sunderland City Council currently enforce a numerical limit of 65 on the number of hackney carriage licences in the Hetton, Houghton and Washington zone. They were asked whether they were aware of this. Some 97.2% were unaware of the numerical limit.

The survey asked respondents whether taxi services in Hetton, Houghton and Washington could be improved. Some 73.1% felt that they could be improved. Figure 8.5 shows the type of improvements that respondents would like to see.



**Figure 8.5** How could be services be improved?

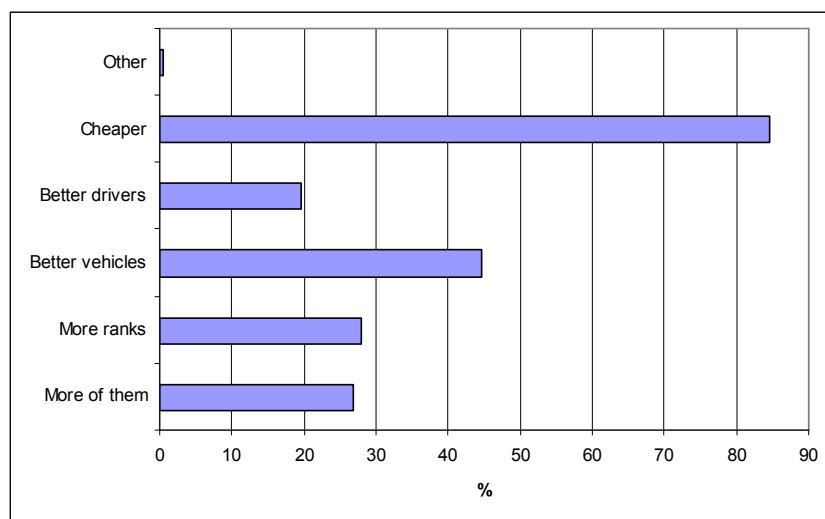
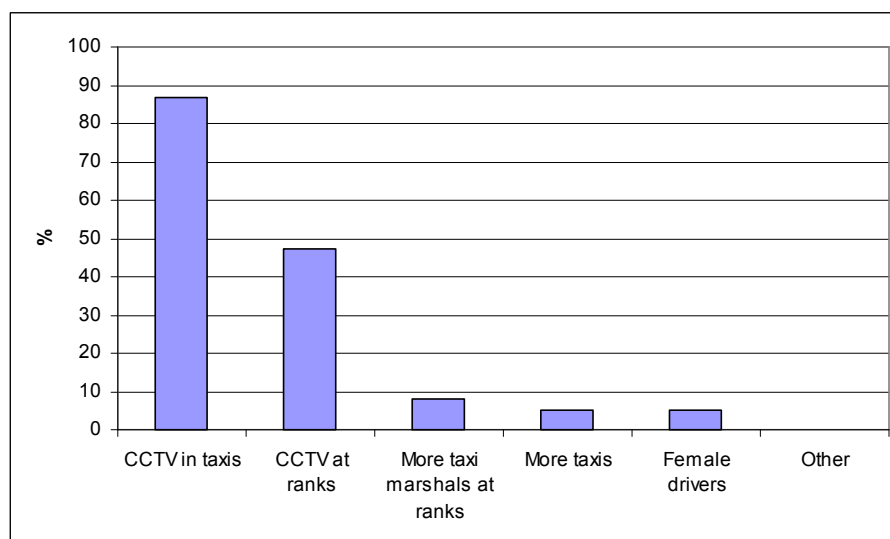


Figure 8.5 indicates that the majority of respondents (84.5%) felt taxi services could be improved if they were cheaper.

## 8.6 Safety and Security

Respondents were asked whether they felt safe when using hackney and private hire vehicles in Hetton, Houghton and Washington. The majority of respondents felt safe using them during the day (98.9%) and the night (86.6%) in Hetton, Houghton and Washington. Those respondents who stated that they do not feel safe using taxis, either during the day or at night, were asked what could be done to improve safety and security of using taxis. The results in figure 8.6 show that 86.8% would feel safer with CCTV in the taxis and 47.4% would feel safer with CCTV at ranks.

**Figure 8.6** Safety improvements



## 8.7 Ranks

Respondents were asked if there were any locations in Hetton, Houghton and Washington where new ranks were needed. Over half of respondents (51.4%) said that they did not know, whilst 45.5% stated no new ranks were needed.

Those respondents who felt new ranks are required in Hetton, Houghton and Washington were subsequently asked to provide a location;

- Near the college
- The Galleries
- Council offices
- Generally across the area

## 8.8 Summary

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

- Some 64.7% of respondents in, Hetton, Houghton and Washington had used a hackney or private hire vehicle in the last three months
- Some 35.1% of trip makers hired their taxi at a rank, whilst 58.9% hired their taxi by telephone and 5.9% of trip makers obtained a taxi by on-street flagdown
- High levels of satisfaction with delay on last trip were recorded for each method of hire
- Majority of respondents had not given up waiting for a hackney or private hire vehicle in the last three months with 14% stating they had given up trying to obtain a vehicle by rank and/or flagdown in Hetton, Houghton and Washington
- The majority of respondents felt safe using taxis during the day (98.9%) and at night (86.6%) in Hetton, Houghton and Washington

## 9 Consultation

### 9.1 Introduction

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.

### 9.2 Direct Consultation

A number of organisations were given the opportunity to attend a meeting in July 2011 to discuss a series of issues regarding the taxi market in both zones. Separate meetings were held with the following;

- Hackney Trade Representatives;
- The Police;
- Disability Representatives;
- Highways department, Sunderland Council.

#### Police and Safer Sunderland Partnership

Representatives from Northumbria Police and the Safer Sunderland Partnership attended a meeting. All representatives felt that it was unlikely that there was unmet demand although there were instances of queuing passengers at night. If any new licenses were released they would be required to work at night to meet demand in this period. The representatives were aware of the numerical limit and made reference to the recent issues in Durham following derestriction - resulting in problems of over ranking in the centre. As a result they did not consider removing the limit in Sunderland would be advisable unless there was a full review of taxi stand space and increases in provision.

Incidences of antisocial behaviour and unrest related to alcohol have reduced since the introduction of taxi marshal points at Park Lane and Green Terrace on Friday and Saturday evenings. The public have welcomed the marshals and the Street Pastors (a volunteer church organisation who assist the vulnerable get home safely by escorting people to taxi stands). The representatives would like the marshal scheme to be rolled

out across other taxi stands but there is no funding available to do this. The funding for the future of the scheme is not secure, with funding only found until the end of this financial year.

The representatives felt further taxi stands were required across Sunderland in order to accommodate the current numbers of hackney carriages. It was felt a full review should be undertaken with taxi stands planned and more carefully thought out. There was an issue with drivers overranking and blocking Derwent Street. This area is the core of the night time economy and there have been suggestions that a feeder taxi stand could be introduced on Vine Place. The city centre is covered by CCTV but the Park Lane taxi stand at the interchange needs further coverage and is not in the right location to serve the night time economy. If use of this stand is to be promoted lighting and CCTV improvements must be implemented however there is currently no funding for this.

Sunderland Council retains responsibility for parking enforcement and enforcement officers do not work late at night. The public are aware of this and therefore there are instances of people parking private vehicles on taxi stands which can cause issues with congestion. At night time the police can't enforce against parked cars on taxi stands and can only ticket for obstruction.

It was felt there was a good mix of vehicles and they were generally of high quality but they were unsure if there were sufficient wheelchair accessible vehicles.

It was felt that some additional training for taxi drivers (both private hire and hackney carriage) was required and that more enforcement of minor traffic offences (one way streets and bus gates) was required.

The representatives felt that the public were unaware of the differences between hackney carriage and private hire services and promotion of the differences should be undertaken as a priority.

#### Sunderland and Hetton, Houghton and Washington Hackney Carriage Trade

Six representatives from both zones attended the meeting. They felt that there were too many hackney carriages operating in Sunderland and Washington and the 41 licences issued in 2005 had destroyed their industry. It was felt the limit on hackney carriages should be retained in both zones and delimiting would lead to congestion.

It was felt the economic situation in the City had deteriorated over the last three years and the representatives noted that population had reduced, 1 in 5 shops were closed, the whole Park Lane sector of the city had been closed, and private hire numbers had increased.

The trade representatives reported a problem with unlicensed plying for hire by the private hire trade across both Sunderland and Washington. It was felt there was a lack of enforcement even though the trade had requested the council undertake this. The representatives felt this unlicensed plying was premeditated as many private hire drivers are taking out public hire insurance rather than private hire insurance. It was felt this practice should be banned.

The representatives indicated around two thirds of drivers had completed the NVQ level 2 Road Passenger Transport qualification on a voluntary basis. It was noted that even if this had been completed the Council required a PACTS course to be undertaken if the driver was involved in Council contract work. It was felt this was unnecessary but that hands on wheelchair handling and vehicle specific training would be useful. No vehicle specific disability and wheelchair handling training is provided to those who have accessible vehicles. However as different vehicle conversions have different fixings there needs to be consistency in vehicle specifications to introduce the training.

One trade representative stated that to his knowledge around 170 hackney carriages operate on a telephone circuit with one operator however the remaining independents do not operate on circuits and rely on rank work.

The trade representatives unanimously felt there was insufficient taxi stand (rank) space across Sunderland. They were of the opinion that there were only 69 spaces on taxi stands in Sunderland for 309 vehicles and that provision needed reviewing. They highlighted the taxi stand near Chase nightclub (Park Lane) was a particular problem. They felt this two car stand needed closing as it was commonly taken by other vehicles parking on it. The trade felt this resulted in congestion as taxis tried to access the stand and were unable to access this. They recognised the resultant queues on the highway may cause an issue for the emergency services and safety issues. Instead it was felt the use of Park Lane Interchange should be encouraged and the taxi stand on Holmeside should be reinstated and extended for use from 00:00 – 06:00. There were also concerns around the changes to the Green Terrace taxi stand. The hackney carriage trade would like to see taxi stands introduced at supermarkets particularly new supermarkets currently in the planning process. This would help remove some cabs from the city centre and reduce over crowding at existing stands.

The trade also felt that Derwent St and Olive St should be closed on weekend nights in order to reduce congestion in the area.

The Washington area trade representative felt taxi demand in the Washington area was focused on the Galleries. They stated there was also demand at the Riverside unofficial rank however private vehicles' parking on taxi stands was a problem in the evening across the Washington area. Since the former Hetton, Houghton and Washington zones were combined the trade considered Hetton and Houghton were rarely served by hackney carriages with the focus of activity on Washington. They felt that as a consequence levels of work had reduced for drivers based in the Washington area. Trade representatives reported that work in the Hetton, Houghton and Washington zone finishes around 00:30 due to premises licensing times and therefore it was felt those working in this zone should be permitted to work in the Sunderland zone between 00:00 – 06:00.

The representatives reported that some 50.7% of hackney carriages are wheelchair accessible which the trade representatives considered sufficient. It was noted the aging population preferred saloon vehicles. Fares were last increased in December 2010 by 3.5% and no representatives wanted to see further increases.

The trade representatives felt the taxi marshals in Sunderland had helped reduce instances of violence and disorder and helped keep passenger calm before they

entered taxis. Fare avoidance is a common problem and the representatives felt the police and CPS should offer more support in prosecuting passengers who assault drivers or dodge fares.

All representatives felt that taxis should be permitted to use bus lanes and bus gates. Avoiding these results in circuitous routes and increases the fares for consumers. It was felt that appropriate signage to permit taxis to use these facilities should be approved as a priority and implemented.

#### Disability Representatives

No representatives attended the meeting. Written consultation was forwarded to these organisations and any responses received are detailed at section 3 of this note.

#### Highways

A Representative from Highways at Sunderland Council attended the meeting. It was felt that there are plenty of hackney carriages available in the day time across the city and if more licences were released this would lead to over ranking and associated problems. The representative stated that there were currently few problems in relation to taxis. The taxi trade did occasionally request new taxi stand locations however these were dealt with in consultation with the licensing department and there was a need to balance other on street needs such as bus stops and loading bays.

### **9.3 Indirect Consultation**

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.

In accordance with advice issues 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.

The comments received are outlined below.

#### Station Taxis

The representative commented that there is an adequate supply of hackney carriages across Sunderland, Washington, Hetton and Houghton. The only peak in demand is on a Saturday night following pay day. It was felt that trade has significantly decreased in the last three years. In addition, the representative expects the ISUD value for the Hetton, Houghton and Washington zone to be zero, and the Sunderland zone to be lower than 8.

It was commented that an IPSOS Mori 'Resident Survey' identified that 88% of participants were satisfied with the level of taxi provision in Sunderland.

With regard to the current policy to limit the number of licences, the representative felt that this enables a more reliable and value for money service. It also ensures that The Council maintains control and can provide a managed growth approach to taxi services. De-restriction could increase safety concerns as drivers may reduce the number of vehicle services due to decreased income. The representative commented that the provision of private hire services across Sunderland, Washington, Hetton and Houghton are adequate, particularly as the number of private hire vehicles has decreased since the last survey.

With regard to the image of the trade, the representative stated that the conditions put in place regarding age policy, vehicle types and vehicle standards by Sunderland City Council result in a very well presented image of the trade. In addition, the main attitude and quality of drivers is very good as a high percentage have undertaken then PATS and NVQ2 training courses. However, at present PATS training is only compulsory for drivers who have education contracts. The representative commented that this training should be undertaken by all drivers.

In general it is thought that taxi stands during the day time period work well. The night time economy tends to dictate where stands are required. The small taxi stand outside of Chase nightclub in Park Lane is causing problems due to illegal parking of vehicles and illegal plying for hire by private hire vehicles. It was commented that additional taxi stands are required in Holmeside and Vine Place. In addition, better lighting, shelters, barriers and use of bus lanes would improve the accessibility of taxi stands.

The representative did not feel that additional wheelchair accessible vehicles are required. It was stated that the representative receives more bookings for saloon vehicles from disabled people than for wheelchair accessible vehicles. One possible improvement could be the introduction of swivel seats.

With regard to fares, it was felt that they are favourable in Sunderland compared to the rest of the country. However, the third tariff for public and bank holidays should be restricted to Christmas and New Year only.

It was commented that the only advertising appears to be funded by individual companies and proprietors. It would help if the council provided directional signage to ranks.

The representative felt that the taxi marshal system has been well received by both the trade and the general public.

Finally, it was felt that with the major ranks situated at Sunderland Station and Park Lane Interchange taxis complement the other types of public transport very well.

#### Equality and Diversity Group, University of Sunderland

A representative from the Equality and Diversity Group at the University of Sunderland responded to the written consultation. It was felt that there is an adequate supply of taxis within the city centre. The trade appears to have a good image, with high quality vehicles and courteous and experienced drivers.

#### Network Development (Strategy) Sunderland City Council

The representative from Network Development at Sunderland City Council responded to the consultation. It was felt that the number and location of the existing taxi stands across both zones are appropriate. None of the taxi stands need to be removed however due to queuing problems at the informal rank on Green Terrace, an experimental taxi stand has been introduced on the eastern side of the road and will continue to be monitored.

The Sunderland South Consolidation Order has recently been introduced, this will address previous problems of disabled drivers parking in taxi bays. The representative did not feel that there are any safety concerns at the taxi stands, although the council are aware of difficulties at the station stand.

The representative commented that although there are competing demands for the finite road space available in Sunderland, many have already been addressed. New facilities and requests will be considered on their merits although the council aim to at minimum maintain existing facilities.

With regard to enforcement, it was commented that this does not normally take place outside of hours although this would be possible if considered necessary. In addition, the use of taxi stands is monitored by taxi marshals.

The representative felt that there appears to be a sufficient provision of taxis during the day with most ranks having vehicles available for hire. If the numerical limit on hackney carriages was removed, it could impact on the existing capacity at taxi stands.



## 10 Taxi Stand (Rank) Review

### 10.1 General Operational Issues

A review of the taxi stands was undertaken and a selection of stands chosen to be observed as part of the study. The rank observations conducted during June provide an indication of the usage of ranks by both passengers and vehicles.

### 10.2 Taxi Stand (Rank) Utilisation

Table 10.1 gives a full breakdown of the findings. 'P' indicates that passengers were recorded during the observation period at each given time period, 'T' indicates that taxis were present during the observation periods.

**Table 10.1 Taxi Stand Utilisation**

Rank	Operating Hours	Weekday		Weekend		Sunday
		Day	Night	Day	Night	Day
Athenaeum Street	24 hr	P,T	P,T	P,T	P,T	P,T
Park Lane (Interchange)	24hr	P,T	P,T	P,T	P,T	P,T
Union St	24hr	P,T	P,T	P,T	P,T	P,T
Green Terrace	NT		P,T		P,T	
Park Lane (Chase)	NT		P,T		P,T	
West St	NT		P,T		P,T	
Asda Washington	24hr	P,T	P,T	P,T	P,T	P,T
In shops, Galleries	DT	P,T		P,T		P,T
Riverside	NT		P,T		P,T	
Spout Lane	NT		P,T		P,T	

No passengers were recorded at stands which were not being serviced by taxis.  
Consultation with the trade identified that they would like to see a feeder taxi stand introduced on Vine St.

## 11 Deriving the Significant Unmet Demand Index Value

### 11.1 Introduction

The data provided in the previous chapters can be summarised using Halcrow's ISUD factor described in Section 4.

### 11.2 Sunderland Zone

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

Average Passenger Delay (Table 5.2)	0.88
Peak Factor (Figure 5.1)	0.5
General Incidence of Delay (Table 5.3)	11.13
Steady State Performance (Table 5.1)	0
Seasonality Factor (paragraph 4.4)	1
Latent Demand Factor (paragraph 6.4)	1.412
<b>ISUD (<math>0.88 \times 0.5 \times 11.13 \times 0 \times 1 \times 1.412</math>)</b>	<b>0</b>

The cut off level for a significant unmet demand is 80. It is clear that the Sunderland zone is well below this cut off point as the ISUD is 0, indicating that there is **NO significant unmet demand**. This conclusion covers both patent and latent/suppressed demand.

### 11.3 Hetton, Houghton and Washington Zone

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

Average Passenger Delay (Table 7.2)	0.04
Peak Factor (Figure 7.1)	1
General Incidence of Delay (Table 7.3)	0.65
Steady State Performance (Table 7.1)	0
Seasonality Factor (paragraph 4.4)	1
Latent Demand Factor (paragraph 8.4)	1.14
<b>ISUD (0.04*1*0.65*0*1*1.14)</b>	<b>0</b>

The cut off level for a significant unmet demand is 80. It is clear that the Hetton, Houghton and Washington zone is well below this cut off point as the ISUD is 0, indicating that there is **NO significant unmet demand**. This conclusion covers both patent and latent/suppressed demand.

## 12 Summary and Conclusions

### 12.1 Introduction

Halcrow has conducted a study of the hackney carriage and private hire market on behalf of Sunderland City Council. The present study has been conducted in pursuit of the following objectives. To determine 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 council maintain the current limit of hackney carriage licences, grant a number of new licences to meet the unmet demand that may be identified by the survey, or grant a specific number of new hackney carriage licences each year?

### 12.2 Significant Unmet Demand

The 2011 study has identified that there is NO evidence of significant unmet demand for hackney carriages in both the Sunderland and Hetton, Houghton and Washington zones. 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.

### 12.3 Public Perception

Public perception of the service was obtained through the undertaking of over 500 face to face surveys. Overall the public were generally satisfied with the service – key points included;

- Low levels of awareness regarding the differences between hackney and private hire vehicles;
- High levels of satisfaction with delay on the last trip;
- Respondents generally felt safe using taxis during the day and night.

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

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.

With respect to availability, average passenger delays at ranks across the week has been observed at just 0.88 minutes in zone 1 and 0.04 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.

It appears that there is a small and insignificant amount of inappropriately met demand in each zone, i.e. demand met by vehicles not licensed within each licensing zone. However as the market in each zone has been found to be leaning to excess supply rather than excess demand Halcrow do not consider this would impact on the finding of no significant unmet demand.

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
<p>Hackney licences likely to continue to command a re-sale value</p> <p>Hackney vehicle licence holders' incomes are higher.</p>	<p>Increased availability of vehicles for hire resulting in (marginal) reductions in overall waiting times at taxi ranks</p> <p>improved availability of vehicles for flagdown</p> <p>Increased availability of accessible vehicles.</p>

In consultation, trade members have referred to the risk of de-restriction resulting in over ranking. The Police were also concerned about the effect of de restriction on limited rank capacity.

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.

This study has been undertaken prior to an announcement from Government on the Equalities Act. This announcement may have an impact on whether Sunderland City Council chooses to remove the numerical limitation policy. At present 52% of the hackney fleet in Sunderland is wheelchair accessible. The Equalities Act is set to determine what percentage of the hackney fleet should be wheelchair accessible. Authorities that numerically limit hackneys will not be able to refuse an application for a wheelchair accessible vehicle should they fall below this threshold.

## 12.5 Recommendations

The 2011 study has identified that there is NO evidence of significant unmet demand for hackney carriages in both zones in Sunderland. This conclusion covers both patent and latent/suppressed demand and is based on an assessment of the implications of case law that has emerged since 2000, and the results of Halcrow's analysis.

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

- continue to limit the number of vehicles in Sunderland Zone at 284 and Hetton, Houghton and Washington zone 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 hackney carriages and allow a free entry policy.

We would also recommend that the authority:

- look to raise awareness of the difference between hackney and private hire vehicles across the authority given the significant number of people questioned who did not know.







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## Appendix 1: Sunderland Zone Rank Observations



Athenaeum Street

Tuesday

07/06/2011

0800-1600

Hour	Rank Throughput		Queue 'Snap-Shot' Totals		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	8	4	0	80	0.00	100.00	0	5	0	0	1
0900-1000	16	9	0	117	0.00	65.00	0	9	0	0	1
1000-1100	23	10	0	141	0.00	70.50	0	10	0	0	1
1100-1200	21	11	0	156	0.00	70.91	0	11	0	0	1
1200-1300	15	8	0	154	0.00	96.25	0	10	0	0	1
1300-1400	23	11	0	187	0.00	85.00	0	12	0	0	1
1400-1500	30	19	0	180	0.00	47.37	0	11	0	0	1
1500-1600	39	22	0	104	0.00	23.64	0	3	0	0	1
<b>Total</b>	<b>175</b>	<b>94</b>	<b>0</b>	<b>1119</b>	<b>0.00</b>	<b>59.52</b>			<b>0</b>	<b>0</b>	<b>8</b>

Thursday

26/05/2011

1800-0000

Hour	Rank Throughput		Queue 'Snap-Shot' Totals		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	33	28	0	60	0.00	10.71	0	4	0	0	1
1900-2000	11	14	0	53	0.00	18.93	0	3	0	0	1
2000-2100	13	12	0	52	0.00	21.67	0	2	0	1	0
2100-2200	19	22	0	37	0.00	8.41	0	2	0	1	0
2200-2300	11	20	0	67	0.00	16.75	0	5	0	0	1
2300-0000	11	10	0	63	0.00	31.50	0	3	0	0	1
<b>Total</b>	<b>98</b>	<b>106</b>	<b>0</b>	<b>332</b>	<b>0.00</b>	<b>15.66</b>			<b>0</b>	<b>2</b>	<b>4</b>

Saturday

11/06/2011

1000-1600

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	20	17	0	33	0.00	9.71	0	1	0	1	0
1100-1200	37	28	0	28	0.00	5.00	0	1	0	1	0
1200-1300	33	19	0	30	0.00	7.89	0	1	0	1	0
1300-1400	33	18	0	32	0.00	8.89	0	2	0	1	0
1400-1500	32	20	0	28	0.00	7.00	0	1	0	1	0
1500-1600	30	19	0	23	0.00	6.05	0	1	0	1	0
Total	185	121	0	174	0.00	7.19			0	6	0

Friday

10/06/2011

1800-0000

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	18	15	0	33	0.00	11.00	0	2	0	1	0
1900-2000	19	16	0	29	0.00	9.06	0	0	0	1	0
2000-2100	18	16	0	39	0.00	12.19	0	1	0	1	0
2100-2200	16	11	0	35	0.00	15.91	0	2	0	1	0
2200-2300	17	15	0	24	0.00	8.00	0	0	0	1	0
2300-0000	3	4	0	3	0.00	3.75	0	0	0	1	0
Total	91	77	0	163	0.00	10.58			0	6	0

Sunday

22/05/2011

1400-1800

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	35	21	0	31	0.00	7.38	0	1	0	1	0
1500-1600	25	14	0	32	0.00	11.43	0	2	0	1	0
1600-1700	25	18	0	33	0.00	9.17	0	1	0	1	0
1700-1800	38	23	16	30	2.11	6.52	9	0	1	0	0
Total	123	76	16	126	0.65	8.29			1	3	0

**Park Lane (Interchange)**

**Tuesday**

**24/05/2011**

**0800-1600**

Hour	Rank Throughput		Queue 'Snap-Shot' Totals		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	4	7	0	79	0.00	56.43	0	4	0	0	1
0900-1000	9	10	0	93	0.00	46.50	0	2	0	1	0
1000-1100	11	15	0	96	0.00	32.00	0	5	0	0	1
1100-1200	14	15	0	101	0.00	33.67	0	5	0	0	1
1200-1300	14	13	0	73	0.00	28.08	0	4	0	0	1
1300-1400	15	15	0	165	0.00	55.00	0	9	0	0	1
1400-1500	15	11	0	155	0.00	70.45	0	11	0	0	1
1500-1600	21	17	0	103	0.00	30.29	0	4	0	0	1
<b>Total</b>	<b>103</b>	<b>103</b>	<b>0</b>	<b>865</b>	<b>0.00</b>	<b>41.99</b>			<b>0</b>	<b>1</b>	<b>7</b>

**Wednesday**

**08/06/2011**

**1800-0000**

Hour	Rank Throughput		Queue 'Snap-Shot' Totals		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	16	13	0	89	0.00	34.23	0	5	0	0	1
1900-2000	25	11	0	117	0.00	53.18	0	7	0	0	1
2000-2100	22	9	0	143	0.00	79.44	0	8	0	0	1
2100-2200	19	10	0	118	0.00	59.00	0	5	0	0	1
2200-2300	13	10	0	53	0.00	26.50	0	2	0	1	0
2300-0000	5	3	0	34	0.00	56.67	0	2	0	1	0
<b>Total</b>	<b>100</b>	<b>56</b>	<b>0</b>	<b>554</b>	<b>0.00</b>	<b>49.46</b>			<b>0</b>	<b>2</b>	<b>4</b>

**Saturday**

**04/06/2011**

**1000-1800**

Hour	Rank Throughput		Queue 'Snap-Shot' Totals		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	16	0	26	0.00	8.13	0	1	0	1	0
1100-1200	10	10	0	29	0.00	14.50	0	0	0	1	0
1200-1300	8	11	0	45	0.00	20.45	0	2	0	1	0
1300-1400	10	14	0	39	0.00	13.93	0	0	0	1	0
<b>Total</b>	<b>39</b>	<b>51</b>	<b>0</b>	<b>139</b>	<b>0.00</b>	<b>13.63</b>			<b>0</b>	<b>4</b>	<b>0</b>

Friday

10/06/2011

1800-0000

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	19	13	0	147	0.00	56.54	0	10	0	0	1
1900-2000	21	10	0	97	0.00	48.50	0	6	0	0	1
2000-2100	13	6	0	116	0.00	96.67	0	7	0	0	1
2100-2200	14	11	0	90	0.00	40.91	0	5	0	0	1
2200-2300	15	9	0	59	0.00	32.78	0	3	0	0	1
2300-0000	5	5	0	47	0.00	47.00	0	3	0	0	1
Total	87	54	0	556	0.00	51.48			0	0	6

Sunday

22/05/2011

1400-1800

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	17	17	0	84	0.00	24.71	0	6	0	0	1
1500-1600	24	23	0	62	0.00	13.48	0	2	0	1	0
1600-1700	16	15	0	101	0.00	33.67	0	6	0	0	1
1700-1800	16	16	0	114	0.00	35.63	0	7	0	0	1
Total	73	71	0	361	0.00	25.42			0	1	3

Union Street

Wednesday

08/06/2011

1000-1800

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	15	8	0	59	0.00	36.88	0	2	0	1	0
1100-1200	11	10	0	40	0.00	20.00	0	1	0	1	0
1200-1300	12	8	0	60	0.00	37.50	0	3	0	0	1
1300-1400	14	11	0	74	0.00	33.64	0	5	0	0	1
1400-1500	8	6	0	79	0.00	65.83	0	6	0	0	1
1500-1600	8	7	0	64	0.00	45.71	0	4	0	0	1
1600-1700	8	110	0	47	0.00	2.14	0	3	0	0	1
Total	76	160	0	423	0.00	13.22			0	2	5

Wednesday 25/05/2011 1800-0200

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	1	0	3	0.00	15.00	0	0	0	1	0
1900-2000	1	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	1	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
0000-0100	0	0	0	0	0.00	0.00	0	0	0	1	0
Total	1	3	0	3	0.00	5.00			0	6	0

Saturday 21/05/2011 1000-1800

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	4	7	0	52	0.00	37.14	0	3	0	0	1
1100-1200	11	12	0	48	0.00	20.00	0	3	0	0	1
1200-1300	16	13	0	74	0.00	28.46	0	4	0	0	1
1300-1400	8	11	0	48	0.00	21.82	0	1	0	1	0
1400-1500	20	9	0	68	0.00	37.78	0	2	0	1	0
1500-1600	5	9	0	35	0.00	19.44	0	1	0	1	0
Total	64	61	0	325	0.00	26.64			0	3	3

Saturday 11/06/2011 1800-0000

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	0	0	0.00	0.00	0	0	0	1	0
1900-2000	2	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	0	0	0	0.00	0.00	0	0	0	1	0
Total	2	1	0	0	0.00	0.00			0	6	0

Sunday

05/06/2011

1000-1400

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	8	5	0	35	0.00	35.00	0	1	0	1	0
1100-1200	6	9	0	46	0.00	25.56	0	1	0	1	0
1200-1300	11	14	0	30	0.00	10.71	0	2	0	1	0
1300-1400	11	13	0	50	0.00	19.23	0	1	0	1	0
Total	36	41	0	161	0.00	19.63			0	4	0

Green Terrace

Monday

23/05/2011

2300-0500

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2300-0000	22	14	0	59	0.00	21.07	0	2	0	1	0
0000-0100	24	200	0	76	0.00	1.90	0	5	0	0	1
0100-0200	19	12	0	75	0.00	31.25	0	5	0	0	1
0200-0300	14	11	0	84	0.00	38.18	0	6	0	0	1
0300-0400	62	30	0	80	0.00	13.33	0	5	0	0	1
0400-0500	28	13	0	68	0.00	26.15	0	4	0	0	1
Total	169	280	0	442	0.00	7.89			0	1	5

Saturday

21/05/2011

2300-0500

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2300-0000	160	83	27	25	0.84	1.51	12	0	1	0	0
0000-0100	263	144	56	6	1.06	0.21	13	0	1	0	0
0100-0200	291	165	174	0	2.99	0.00	31	0	1	0	0
0200-0300	255	156	177	0	3.47	0.00	21	0	1	0	0
0300-0400	237	140	141	13	2.97	0.46	32	0	1	0	0
0400-0500	129	83	11	44	0.43	2.65	11	0	1	0	0
Total	1335	771	586	88	2.19	0.57			6	0	0



# Park Lane (Chase Nightclub)

Monday

06/06/2011

2300-0300

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	Passengers	Cabs	Passenger Queue	Cab Queue	Average Passenger Delay	Average Cab Delay	Maximum Passenger Queue	Minimum Cab Queue	Excess Demand	Equilibrium	Excess Supply
2300-0000	13	7	0	53	0.00	37.86	0	3	0	0	1
0000-0100	8	6	0	62	0.00	51.67	0	4	0	0	1
0100-0200	9	10	0	19	0.00	9.50	0	0	0	1	0
0200-0300	1	1	0	0	0.00	0.00	0	0	0	1	0
0300-0400	0	1	0	0	0.00	0.00	0	0	0	1	0
Total	31	25	0	134	0.00	26.80			0	3	2

Saturday

21/05/2011

2200-0300

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	52	30	0	44	0.00	7.33	0	2	0	1	0
2300-0000	87	52	7	18	0.40	1.73	7	0	1	0	0
0000-0100	112	64	31	5	1.38	0.39	8	0	1	0	0
0100-0200	127	76	49	36	1.93	2.37	10	0	1	0	0
0200-0300	109	60	2	55	0.09	4.58	2	1	0	1	0
Total	487	282	89	158	0.91	2.80			3	2	0

# West Street

Monday

23/05/2011

1900-2300

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	4	3	0	0	0.00	0.00	0	0	0	1	0
2000-2100	1	2	1	0	5.00	0.00	1	0	0	1	0
2100-2200	0	1	0	0	0.00	0.00	0	0	0	1	0
2200-2300	0	2	0	0	0.00	0.00	0	0	0	1	0
Total	5	8	1	0	1.00	0.00			0	4	0

Saturday

11/06/2011

1900-2300

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	1	0	0	0.00	0.00	0	0	0	1	0
2000-2100	2	1	0	0	0.00	0.00	0	0	0	1	0
2100-2200	6	2	0	6	0.00	15.00	0	0	0	1	0
2200-2300	8	4	0	13	0.00	16.25	0	0	0	1	0
<b>Total</b>	<b>16</b>	<b>8</b>	<b>0</b>	<b>19</b>	<b>0.00</b>	<b>11.88</b>			<b>0</b>	<b>4</b>	<b>0</b>

## Appendix 2

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<b>Project</b>	Sunderland Hackney Carriage and Private Hire Study – Sunderland City Zone	<b>Date</b>	10 <sup>th</sup> August 2011
<b>Note</b>	Public Attitude Survey Results	<b>Ref</b>	GTXSUN000
<b>Author</b>	Nikki Callaghan		

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### **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 Sunderland. In particular, the survey allowed an assessment of flagdown, telephone and rank delays, the satisfaction with delays, and general use information in the Sunderland Zone.

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 Some 262 on-street public attitude surveys were carried out in July 2011. The surveys were conducted during the day across a range of locations within the Sunderland licensing zone, including the city centre and the university. 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. The age and gender samples are given in Table 1 below. The sample of 262 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	83	33.2	203	77.5

## Project Sunderland Hackney Carriage and Private Hire Study – Sunderland City Zone Public Attitude Survey Results

35-64	119	47.6	52	19.8
65+	48	19.2	7	2.7
<b>Total</b>	<b>250</b>	<b>100.0</b>	<b>262</b>	<b>100.0</b>
Male	120	48.0	185	70.6
Female	130	52.0	77	29.4
<b>Total</b>	<b>250</b>	<b>100.0</b>	<b>262</b>	<b>100.0</b>

2.3 As can be seen in Table 1, the survey provides an under representation of the 35-64 and over 65 age category's and a slight over representation of the 16-34 age category who took part in the survey.

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

*Table 2 - Economic Status*

	<b>Frequency</b>	<b>Percent</b>
Full-time Employed	56	21.5
Part-time Employed	29	11.2
Unemployed	12	4.6
Student/Pupil	141	54.2
Retired	10	3.8
Housewife/Husband	8	3.1
Other	4	1.5
<b>Total</b>	<b>260</b>	<b>100.0</b>

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

*Table 3 - Residency*

	<b>Frequency</b>	<b>Percent</b>
Permanent Resident	62	24.4
Visitor	7	2.8
Tourist	8	3.1
University Student	177	69.7
<b>Total</b>	<b>254</b>	<b>100.0</b>

## Project Sunderland Hackney Carriage and Private Hire Study – Sunderland City Zone Public Attitude Survey Results

**3 Characteristics of Last Trip by Taxi**

- 3.1 Respondents were asked if the following statement was true or false “All taxis are allowed to pick up in the street or at a rank”. The results are shown in Table 4 below.

*Table 4 - True or false?*

<b>Trip Type</b>	<b>Frequency</b>	<b>Percent</b>
True	182	70.3
False	77	29.7
<b>Total</b>	<b>259</b>	<b>100.0</b>

- 3.2 The results show that over two thirds of respondents did not know the difference between hackney carriages and private hire vehicles. If the respondent answered “true”, the surveyor explained to the respondent that only hackney carriages can pick up passengers from a rank or by flagdown in the street. Private hire vehicles must be prebooked.
- 3.3 Respondents were each asked if they had made a journey by taxi in Sunderland within the last three months. The survey found that 72% had used a taxi within this period. The results are displayed in Table 5.

*Table 5 - Have you made a trip by taxi in the past three months?*

<b>Trip Type</b>	<b>Frequency</b>	<b>Percent</b>
Yes	188	72.0
No	73	28.0
<b>Total</b>	<b>261</b>	<b>100.0</b>

- 3.4 Respondents who had hired a taxi in the last three months were asked further questions about their experience. Some 43.3% of trip makers stated that they hired their taxi at a rank. Some 49.2% of hirings were achieved by telephone with 7.5% of trip makers obtaining a taxi by on-street flagdown. Table 6 reveals the pattern of taxi hire.

*Table 6 - Method of Taxi Hire for Last Trip*

## Project Sunderland Hackney Carriage and Private Hire Study – Sunderland City Zone Public Attitude Survey Results

<b>Trip Type</b>	<b>Frequency</b>	<b>Percent</b>
Rank	81	43.3
Flagdown	14	7.5
Telephone	92	49.2
<b>Total</b>	<b>187</b>	<b>100.0</b>

- 3.5 Respondents were asked what type of vehicle they hired. The most common type of vehicle used was a saloon car (90.1%) with 6% of respondents hiring a purpose built cab and 3.9% of respondents stating other. Those who stated 'other' specified that they used a 7-seater vehicle. Table 7 shows the results.

*Table 7 - Vehicle type for last trip*

<b>Vehicle Type</b>	<b>Frequency</b>	<b>Percent</b>
Purpose built cab	11	6.0
Saloon car	164	90.1
Other	7	3.9
<b>Total</b>	<b>182</b>	<b>100.0</b>

- 3.6 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 (96.3%).
- 3.7 Table 8 shows that that for each method of obtaining a taxi, the majority were satisfied with the service. Satisfaction with obtaining a taxi by rank was 88.5%, by telephone was 97.8% and by flagdown was 92.9%.

*Table 8 - Satisfaction with delay on last trip (Multiple Responses)*

<b>Method of Hire</b>	<b>Frequency</b>	<b>Percent</b>
Rank	77	88.5
Flagdown	13	92.9
Telephone	90	97.8

#### **4** *Attempted Method of Hire*

- 4.1 To provide evidence of suppressed demand in the event of a finding of significant patent unmet demand, all respondents were asked to identify

## Project Sunderland Hackney Carriage and Private Hire Study – Sunderland City Zone Public Attitude Survey Results

whether or not they had given up waiting for a taxi at a rank, on the street, or by telephone in Sunderland in the last three months. The results are summarised in Table 9.

*Table 9 - Given up attempting to hire a taxi by method of hire in the last three months*

	Yes		No	
	Frequency	Percent	Frequency	Percent
Given up at a rank	56	21.4	206	78.6
Given up flagdown	56	21.4	206	78.6
Given up telephone	30	11.5	232	88.5

- 4.2 The majority of respondents replied that they had not given up waiting for a taxi in the last three months. Some 41.2% had given up waiting to obtain a taxi by rank or flagdown.
- 4.3 Respondents who had given up trying to obtain a taxi in the last three months at a rank, by flagdown and/or by telephone were asked the location where they had given up waiting for a taxi. The most common areas were Sunderland University, Glass Spider (i.e. Green Terrace) and Sunderland Station.
- 4.4 Respondents were also asked what type of vehicle they required when they gave up waiting. Of those respondents who answered this question, some 37.5% did not have a preference and a further 37.5% required a saloon car.
- 4.5 Respondents were told that Sunderland City Council currently enforce a numerical limit of 284 on the number of hackney carriage licences in the Sunderland zone. They were asked whether they were aware of this. Some 16.9% of respondents were aware of the numerical limit. The results are shown in Table 12.

*Table 12 – Awareness of numerical limit on hackney carriages*

	Frequency	Percent
Yes	44	16.9
No	217	83.1
<b>Total</b>	<b>261</b>	<b>100.0</b>

## Project Sunderland Hackney Carriage and Private Hire Study – Sunderland City Zone Public Attitude Survey Results

**5 Service Provision**

5.1 The survey asked respondents whether taxi services in Sunderland could be improved. Some 61.5% felt that they could be improved. These respondents were then asked what could be done to improve the service. The results are shown in table 13.

*Table 13 – How could taxi services be improved? (multiple responses)*

	Frequency	Percentage
More of them	31	20.7
More ranks	53	35.3
Better vehicles	7	4.7
Better drivers	8	5.3
Cheaper	94	62.7
Other	0	0.0

**6 Safety**

6.1 Respondents were asked whether they feel safe whilst using taxis both during the day and at night. The results are shown in table 14.

*Table 14 – Safety using taxis*

	Day		Night	
	Frequency	Percent	Frequency	Percent
Yes	256	98.1	240	92.7
No	5	1.9	19	7.3
<b>Total</b>	<b>261</b>	<b>100.0</b>	<b>259</b>	<b>100.0</b>

6.2 Those respondents who stated that they do not feel safe using taxis, either during the day or at night, were asked what could be done to improve safety and security of using taxis in Sunderland. The results in table 15 show that 63.2% said they would like CCTV in taxis and 47.4% said they would feel safer with female drivers.

*Table 15 – Improving safety (Multiple Responses)*

	Frequency	Percent
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## Project Sunderland Hackney Carriage and Private Hire Study – Sunderland City Zone Public Attitude Survey Results

CCTV in taxis	12	63.2
CCTV at ranks	0	0.0
More taxi marshals at ranks	0	0.0
More taxis	0	0.0
Female drivers	9	47.4
Other	1	5.3

## 7 *Ranks*

7.1 Respondents were asked if there were any locations in Sunderland where new ranks were needed. Over half respondents (63%) said that no new ranks were needed in Sunderland. The results are shown in Table 18.

Table 18 – New ranks

	Frequency	Percent
Yes	24	9.4
No	160	63.0
Do Not Know	70	27.6
<b>Total</b>	<b>254</b>	<b>100.0</b>

7.2 Those individuals who stated they would like to see a new rank were subsequently asked to provide a location:

- Sunderland University (50%);
- Generally in the City Centre (16.7%); and
- Pallion (8.3%)

## Appendix 3: Hetton, Houghton and Washington Zone Rank Observations



ASDA, Washington

Monday 24/05/2011 0800-1400

Hour	Rank Throughput		Queue 'Snap-Shot' Totals		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	12	0	70	0.00	29.17	0	2	0	1	0
0900-1000	12	13	0	65	0.00	25.00	0	4	0	0	1
1000-1100	36	31	0	62	0.00	10.00	0	3	0	0	1
1100-1200	42	34	0	57	0.00	8.38	0	2	0	1	0
1200-1300	36	30	0	62	0.00	10.33	0	2	0	1	0
1300-1400	45	34	0	67	0.00	9.85	0	3	0	0	1
<b>Total</b>	<b>182</b>	<b>154</b>	<b>0</b>	<b>383</b>	<b>0.00</b>	<b>12.44</b>			<b>0</b>	<b>3</b>	<b>3</b>

Monday 27/06/2011 1800-2300

Hour	Rank Throughput		Queue 'Snap-Shot' Totals		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	12	0	32	0.00	13.33	0	1	0	1	0
1900-2000	13	10	0	26	0.00	13.00	0	0	0	1	0
2000-2100	20	13	0	30	0.00	11.54	0	1	0	1	0
2100-2200	24	13	0	35	0.00	13.46	0	1	0	1	0
<b>Total</b>	<b>78</b>	<b>48</b>	<b>0</b>	<b>123</b>	<b>0.00</b>	<b>12.81</b>			<b>0</b>	<b>4</b>	<b>0</b>

Saturday 11/06/2011 1000-1800

Hour	Rank Throughput		Queue 'Snap-Shot' Totals		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	21	14	0	60	0.00	21.43	0	3	0	0	1
1100-1200	27	25	0	49	0.00	9.80	0	1	0	1	0
1200-1300	28	20	0	70	0.00	17.50	0	5	0	0	1
1300-1400	48	32	0	57	0.00	8.91	0	2	0	1	0
1400-1500	51	38	0	45	0.00	5.92	0	1	0	1	0
1500-1600	43	30	0	62	0.00	10.33	0	3	0	0	1
<b>Total</b>	<b>218</b>	<b>159</b>	<b>0</b>	<b>343</b>	<b>0.00</b>	<b>10.79</b>			<b>0</b>	<b>3</b>	<b>3</b>

Saturday

04/06/2011

1800-2100

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	13	12	0	36	0.00	15.00	0	0	0	1	0
1900-2000	0	2	0	21	0.00	52.50	0	0	0	1	0
2000-2100	8	6	0	37	0.00	30.83	0	0	0	1	0
Total	21	20	0	94	0.00	23.50			0	3	0

Sunday

22/05/2011

1400-1800

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	9	6	0	94	0.00	78.33	0	5	0	0	1
1500-1600	18	11	0	77	0.00	35.00	0	3	0	0	1
1600-1700	7	8	0	21	0.00	13.13	0	0	0	1	0
1700-1800	0	0	0	0	0.00	0.00	0	0	0	1	0
Total	34	25	0	192	0.00	38.40			0	2	2

## In Shops (Galleries)

Wednesday

25/05/2011

1000-1800

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	7	6	0	78	0.00	65.00	0	6	0	0	1
1100-1200	17	14	0	65	0.00	23.21	0	3	0	0	1
1200-1300	26	18	0	55	0.00	15.28	0	2	0	0	1
1300-1400	24	14	0	93	0.00	33.21	0	7	0	1	0
1400-1500	20	16	0	63	0.00	19.69	0	3	0	0	1
1500-1600	9	7	0	56	0.00	40.00	0	2	0	1	0
1600-1700	9	7	0	55	0.00	39.29	0	1	0	1	0
1700-1800	15	8	0	37	0.00	23.13	0	0	0	1	0
Total	127	90	0	502	0.00	27.89			0	4	4

Saturday

21/05/2011

1000-1800

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	13	10	0	38	0.00	19.00	0	1	0	1	0
1100-1200	30	23	0	19	0.00	4.13	0	0	0	1	0
1200-1300	19	13	0	61	0.00	23.46	0	1	0	1	0
1300-1400	8	6	0	60	0.00	50.00	0	3	0	0	1
1400-1500	24	14	4	32	0.83	11.43	4	0	1	0	0
1500-1600	12	8	0	56	0.00	35.00	0	4	0	0	1
Total	106	74	4	266	0.19	17.97			1	3	2

Sunday

05/06/2011

1400-1800

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	11	9	0	79	0.00	43.89	0	5	0	0	1
1300-1400	12	8	0	59	0.00	36.88	0	4	0	0	1
1400-1500	3	5	0	10	0.00	10.00	0	0	0	1	0
1500-1600	0	0	0	0	0.00	0.00	0	0	0	1	0
Total	26	22	0	148	0.00	33.64			0	2	2

Riverside, Washington

Thursday

09/06/2011

2000-0200

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	5	3	0	21	0.00	35.00	0	1	0	1	0
2100-2200	4	2	0	25	0.00	62.50	0	1	0	1	0
2200-2300	7	5	1	13	0.71	13.00	1	0	0	1	0
0000-0100	1	1	0	19	0.00	95.00	0	0	0	1	0
0100-0200	1	1	0	12	0.00	60.00	0	0	0	1	0
0200-0300	0	0	0	14	0.00	0.00	0	0	0	1	0
Total	18	12	1	104	0.28	43.33			0	6	0

Saturday

04/06/2011

2200-0400

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	27	12	0	39	0.00	16.25	0	2	0	1	0
2300-0000	86	32	0	19	0.00	2.97	0	0	0	1	0
0000-0100	28	16	8	11	1.43	3.44	5	0	1	0	0
0100-0200	0	0	0	0	0.00	0.00	0	0	0	1	0
0200-0300	0	0	0	0	0.00	0.00	0	0	0	1	0
0300-0400	0	0	0	0	0.00	0.00	0	0	0	1	0
Total	141	60	8	69	0.28	5.75			1	5	0

Spout Lane

Thursday

26/05/2011

1900-0000

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	2	2	0	1	0.00	2.50	0	0	0	1	0
2000-2100	0	0	0	0	0.00	0.00	0	0	0	1	0
2100-2200	0	1	0	0	0.00	0.00	0	0	0	1	0
2200-2300	0	1	0	2	0.00	10.00	0	0	0	1	0
2300-0000	0	0	0	0	0.00	0.00	0	0	0	1	0
Total	2	4	0	3	0.00	3.75			0	5	0

Friday

10/06/2011

1900-0000

	Rank Throughput		Queue 'Snap-Shot' Totals		Service Quality		Queue Extremes		Market Conditions		
Hour	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	19	7	0	4	0.00	2.86	0	0	0	1	0
2000-2100	4	2	0	26	0.00	65.00	0	1	0	1	0
2100-2200	19	8	0	31	0.00	19.38	0	0	0	1	0
2200-2300	13	6	0	18	0.00	15.00	0	0	0	1	0
2300-0000	2	1	0	3	0.00	15.00	0	0	0	1	0
Total	57	24	0	82	0.00	17.08			0	5	0

## Appendix 4

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<b>Project</b>	Sunderland Hackney Carriage and Private Hire Study – Hetton, Houghton and Washington zone	<b>Date</b>	10 <sup>th</sup> August 2011
<b>Note</b>	Public Attitude Survey Results	<b>Ref</b>	GTXSUN000
<b>Author</b>	Nikki Callaghan		

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### **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 Hetton, Houghton and Washington. In particular, the survey allowed an assessment of flagdown, telephone and rank delays, the satisfaction with delays, and general use information in the Hetton, Houghton and Washington zone.

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 Some 288 on-street public attitude surveys were carried out in July 2011. The surveys were conducted during the day across a range of locations within the Hetton, Houghton and Washington licensing zone. 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. The age and gender samples are given in Table 1 below. The sample of 288 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

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16-34	83	33.2	145	50.5
35-64	119	47.6	107	37.3
65+	48	19.2	35	12.2
<b>Total</b>	<b>250</b>	<b>100.0</b>	<b>287</b>	<b>100.0</b>
Male	120	48.0	179	63.3
Female	130	52.0	104	36.7
<b>Total</b>	<b>250</b>	<b>100.0</b>	<b>283</b>	<b>100.0</b>

2.3 As can be seen in Table 1, the survey provides a slight under representation of the 35-64 and over 65 age category's and a slight over representation of the 16-34 age category who took part in the survey.

2.4 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	83	29.5
Part-time Employed	70	24.9
Unemployed	21	7.5
Student/Pupil	63	22.4
Retired	39	13.9
Housewife/Husband	5	1.8
Other	0	0.0
<b>Total</b>	<b>271</b>	<b>100.0</b>

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

*Table 3 - Residency*

	Frequency	Percent
Permanent Resident	249	92.9
Visitor	2	0.7
Tourist	0	0.0
University Student	17	6.3

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<b>Total</b>	<b>268</b>	<b>100.0</b>
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### 3 *Characteristics of Last Trip by Taxi*

3.1 Respondents were asked if the following statement was true or false “All taxis are allowed to pick up in the street or at a rank”. The results are shown in Table 4 below.

*Table 4 - True or false?*

<b>Trip Type</b>	<b>Frequency</b>	<b>Percent</b>
True	55	19.3
False	230	80.7
<b>Total</b>	<b>285</b>	<b>100.0</b>

3.2 The results show that some 80.7% of respondents did know the difference between hackney carriages and private hire vehicles. If the respondent answered “true”, the surveyor explained to the respondent that only hackney carriages can pick up passengers from a rank or by flagdown in the street. Private hire vehicles must be prebooked.

3.3 Respondents were each asked if they had made a journey by taxi in Hetton, Houghton or Washington within the last three months. The survey found that 64.7% had used a taxi within this period. The results are displayed in Table 5.

*Table 5 - Have you made a trip by taxi in the past three months?*

<b>Trip Type</b>	<b>Frequency</b>	<b>Percent</b>
Yes	185	64.7
No	101	35.3
<b>Total</b>	<b>286</b>	<b>100.0</b>

3.4 Respondents who had hired a taxi in the last three months were asked further questions about their experience. Some 35.1% of trip makers stated that they hired their taxi at a rank. Some 58.9% of hiring's were achieved by telephone with 5.9% of trip makers obtaining a taxi by on-street flagdown. Table 6 reveals the pattern of taxi hire.

*Table 6 - Method of Taxi Hire for Last Trip*



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<b>Trip Type</b>	<b>Frequency</b>	<b>Percent</b>
Rank	65	35.1
Flagdown	11	5.9
Telephone	109	58.9
<b>Total</b>	<b>185</b>	<b>100.0</b>

- 3.5 Respondents were asked what type of vehicle they hired. The most common type of vehicle used was a saloon car (75.6%) with 8% of respondents hiring a purpose built cab and 16.5% of respondents stating other. Those who stated 'other' commented that the vehicle type varies. Table 7 shows the results.

*Table 7 - Vehicle type for last trip*

<b>Vehicle Type</b>	<b>Frequency</b>	<b>Percent</b>
Purpose built cab	14	8.0
Saloon car	133	75.6
Other	29	16.5
<b>Total</b>	<b>176</b>	<b>100.0</b>

- 3.6 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 (88%).
- 3.7 Table 8 shows that that for each method of obtaining a taxi, the majority were satisfied with the service. Satisfaction with obtaining a taxi by rank was 83.1%, by telephone was 91.8% and by flagdown was 72.7%.

*Table 8 - Satisfaction with delay on last trip (Multiple Responses)*

<b>Method of Hire</b>	<b>Frequency</b>	<b>Percent</b>
Rank	54	83.1
Flagdown	8	72.7
Telephone	101	91.8

#### **4** *Attempted Method of Hire*

- 4.1 To provide evidence of suppressed demand in the event of a finding of significant patent unmet demand, all respondents were asked to identify

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whether or not they had given up waiting for a taxi at a rank, on the street, or by telephone in Hetton, Houghton and Washington in the last three months. The results are summarised in Table 9.

*Table 9 - Given up attempting to hire a taxi by method of hire in the last three months*

	Yes		No	
	Frequency	Percent	Frequency	Percent
Given up at a rank	39	13.6	247	86.4
Given up flagdown	3	1.0	283	99.0
Given up telephone	17	6.0	268	94.0

- 4.2 The majority of respondents replied that they had not given up waiting for a taxi in the last three months. Some 14% had given up waiting to obtain a taxi by rank or flagdown.
- 4.3 Respondents who had given up trying to obtain a taxi in the last three months at a rank, by flagdown and/or by telephone were asked the location where they had given up waiting for a taxi. The most common areas were Washington and Hetton, however no specific locations were provided.
- 4.4 Respondents were also asked what type of vehicle they required when they gave up waiting. Of those respondents who answered this question, some 61.7% required a saloon car and 25% did not have a preference whilst 10% of respondents required a vehicle that could fit more than four passengers.
- 4.5 Respondents were told that Sunderland City Council currently enforce a numerical limit of 65 on the number of hackney carriage licences in the Hetton, Houghton and Washington zone. They were asked whether they were aware of this. Some 2.8% of respondents were aware of the numerical limit. The results are shown in Table 12.

*Table 12 – Awareness of numerical limit on hackney carriages*

	Frequency	Percent
Yes	8	2.8

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No	276	97.2
<b>Total</b>	<b>284</b>	<b>100.0</b>

## 5 *Service Provision*

5.1 The survey asked respondents whether taxi services in Hetton, Houghton and Washington could be improved. Some 73.1% felt that they could be improved. These respondents were then asked what could be done to improve the service. The results are shown in table 13.

Table 13 – How could taxi services be improved? (multiple responses)

	Frequency	Percentage
More of them	52	26.9
More ranks	54	28.0
Better vehicles	86	44.6
Better drivers	38	19.7
Cheaper	163	84.5
Other	1	0.5

## 6 *Safety*

6.1 Respondents were asked whether they feel safe whilst using taxis both during the day and at night. The results are shown in table 14.

Table 14 – Safety using taxis

	Day		Night	
	Frequency	Percent	Frequency	Percent
Yes	281	98.9	246	86.6
No	3	1.1	38	13.4
<b>Total</b>	<b>284</b>	<b>100.0</b>	<b>284</b>	<b>100.0</b>

6.2 Those respondents who stated that they do not feel safe using taxis, either during the day or at night, were asked what could be done to improve safety and security of using taxis in Hetton, Houghton and Washington. The results in table 15 show that 86.8% said they would like CCTV in taxis and 47.4% would like to see CCTV at ranks.

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Table 15 – Improving safety (Multiple Responses)

	Frequency	Percent
CCTV in taxis	33	86.8
CCTV at ranks	18	47.4
More taxi marshals at ranks	3	7.9
More taxis	2	5.3
Female drivers	2	5.3
Other	0	0.0

## 7 Ranks

7.1 Respondents were asked if there were any locations in Hetton, Houghton and Washington where new ranks were needed. Over half respondents (51.4%) said that they did not know whilst 45.5% of respondents said no new ranks were needed across Hetton, Houghton and Washington. The results are shown in Table 18.

Table 18 – New ranks

	Frequency	Percent
Yes	9	3.1
No	130	45.5
Do Not Know	147	51.4
<b>Total</b>	<b>286</b>	<b>100.0</b>

7.2 Those individuals who stated they would like to see a new rank were subsequently asked to provide a location. These included:

- Near the college
- The Galleries
- Council offices
- Generally across the area