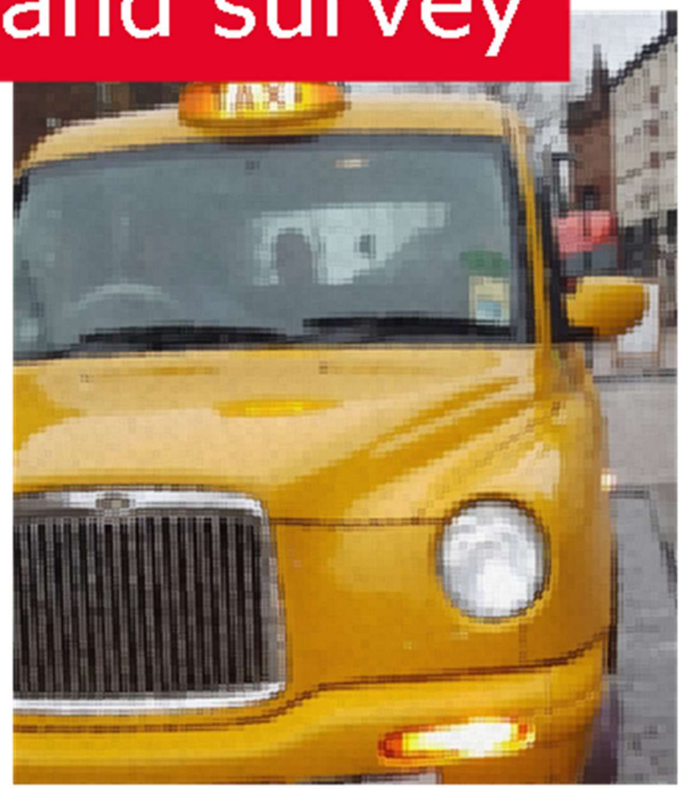
TRAFFIC + TRANSPORTATION

Unmet demand survey



Crawley Borough Council
May 2017

Executive Summary

This Unmet demand survey has been undertaken on behalf of Crawley Borough Council following the guidance of the April 2010 DfT Best Practice Guidance document, and all relevant case history with regard to unmet demand. This executive summary draws from the main report the salient points regarding this independent database of evidence to enable Councillors to conclude regarding the present policy of limiting hackney carriage vehicle numbers.

The survey began with our appointment in January 2017 and the subsequent inception in early February. On the ground interviews and rank observations occurred in March 2017, with trade views obtained in late March and early April. Key stakeholder views were obtained through the period of the survey. This report is being presented to Councillors in June 2017.

Crawley is a district authority with highway and transport powers at the County level. As is typical, the background transport policy has little reference to licensed vehicles apart from that Station Travel Plans are sought.

A period of no limit on hackney carriage vehicle numbers apart from the impact of quality control requiring all new vehicles to be wheel chair accessible had the main impact of increasing WAV levels to the current 43%. Recently there has been growth in numbers of operators and private hire vehicles.

Rank observations found abuse by private vehicles of ranks, but little other abuse. The level of WAV activity at ranks mirrored the proportion in the fleet. Although only one person was seen using a wheel chair to access vehicles at ranks during the survey, a targeted exercise found inconsistent service to those needing to travel in wheel chairs which needs action.

Although only Three Bridges station rank is active at all times and days, the Boulevard and the Jubilee Oak ranks still make significant contributions to passengers needing hackney carriages in the area. The Bus station and Station Way night ranks are both still used, but not to a great extent. While overall demand has stayed about the same, this seems to have become more focused at the top three ranks, and more so at Three Bridges. This 'standing still' in terms of overall demand for hackney carriages is against a national trend of continued decline.

There appears to be a good level of spare capacity in the fleet operating, particularly late at night.

Overall public usage of licensed vehicles is low, with that for hackney carriages even lower with a very high proportion of people unable to remember the last time they used a hackney carriage, although very few had never seen them.

Rank knowledge which was fairly poor did not match usage, although half those mentioning ranks said they used them. There is general satisfaction with the service provided and low latent demand.

Key stakeholders tend to use private hire and get confused between ranks and private hire offices.

Trade response was good and identified a high level of experience. The working week was low compared to other areas, a symptom of the overall low level of demand. The private hire and hackney carriage trades are relatively separate and though many hackney carriages take telephone bookings they still tend to get most fares from ranks.

There was strong support for retaining the limit on vehicle numbers, including from the private hire respondents.

The industry standard ISUD index result was negligible albeit increased from three years ago in most aspects.

Other influences on usage of hackney carriages were mixed, with fares not having changed, but increased competition from bus service improvements. On the contrary, the difference between private hire and hackney carriage fares appeared to have reduced.

The overall conclusion is that evidence supports retention of the current limit on vehicle numbers at the present level. However, action is needed to ensure service is available to those needing to travel in wheel chairs, particularly at Three Bridges station.

Contents

1 General introduction and background

Crawley Borough Council is responsible for the licensing of hackney carriage and private hire vehicles operating within the Council area and is the licensing authority for this complete area. It retains a limit on the number of hackney carriage vehicles licensed. There is no legal means by which either private hire vehicle numbers, private hire or hackney carriage driver numbers, or the number of private hire operators can be limited. Crawley took off its limit on vehicle numbers in 2002. Following a survey in 2011, the limit was returned, and this policy was again tested by survey in 2014.

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

Current hackney carriage, private hire and operator licensing is undertaken within the legal frameworks set by the Town Polices Clause Act 1847. This has been amended by various following legislation including the Transport Act 1985, Section 16 in regard to hackney carriage vehicle limits, and by the Local Government Miscellaneous Provisions Act 1976 with reference to private hire vehicles and operations. Many of the aspects of these laws have been tested and refined by other more recent legislation and more importantly through case law. Beyond legislation, the experience of the person in the street tends to see both hackney carriage and private hire vehicles both as 'taxis' – a term we will try for the sake of clarity to use only in its generic sense within the report. We will use the term 'licensed vehicles' to refer to both hackney carriage and private hire.

The legislation around licensed vehicles and drivers has been the subject of many attempts at review. The limiting of hackney carriage vehicle numbers has been a particular concern as it is often considered to be a restrictive practice and against natural economic trends. The three most recent reviews were by the Office of Fair Trading in 2003, through the production of the BPG in 2010, and the Law Commission review which published its results in 2014. None of these resulted in any material change to the legislation involved in licensing.

The upshot of all these reviews in respect of the principal subject of this survey is that local authorities retain the right to restrict the number of hackney carriage vehicle licenses. The Law Commission conclusion included retention of the power to limit hackney carriage vehicle numbers but utilizing a public interest test determined by the Secretary of State. It also suggested the three-year horizon also be used for rank reviews and accessibility reviews.

After introduction of the 1985 Transport Act, Leeds University Institute for Transport Studies developed a tool by which unmet demand could be evaluated and a determination made if this was significant or not. The tool was taken forward and developed as more studies were undertaken. Over time this 'index of significance of unmet demand' (ISUD) became accepted as an industry standard tool to be used for this purpose. Some revisions have been made following the few but specific court cases where various parties have challenged the policy of retaining a limit. Some of the application has differed between Scottish and English authorities due to some court cases in Scotland taking interpretation of the duty of the licensing authority further than is usual in England and Wales.

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

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

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

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

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

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

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

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

In general, the determination of conclusions about significance of unmet demand must take into account the practicability of improving the standard of service through the increase of supply of vehicles. It is also important to have consistent treatment of authorities as well as for the same authority over time.

In conclusion, the present legislation in England and Wales sees public fare-paying passenger carrying vehicles firstly split by passenger capacity. All vehicles able to carry nine or more passengers are dealt with under national public service vehicle licensing. Local licensing authorities only have jurisdiction over vehicles carrying eight or less passengers.

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

2 Local background and context

Key dates for this Unmet demand survey for Crawley Borough Council are:

- appointed CTS Traffic and Transportation on 6th January 2017
- in accordance with our proposal of December 2016
- as confirmed during the inception meeting for the survey held on 1st February 2017
- this survey was carried out between 1st February 2017 and May 2017
- On street pedestrian survey work occurred in March 2017
- the video rank observations occurred in March 2017
- Licensed vehicle driver opinions and operating practices were canvassed during late March / early April 2017
- Key stakeholders were consulted throughout the period of the survey
- A draft of this Final Report was reviewed by the client during May 2017
- and reported to the appropriate Council committee in Summer 2017.

Crawley Borough Council is a district authority within the larger county of West Sussex. The authority has a current population of 113,800 using the 2017 estimates currently available from the 2011 census. Highway and transport powers are under the auspices of the County, which means that rank provision is also a County function, as is general enforcement of traffic regulations including abuse of ranks by non-licensed vehicles.

Future overall transport strategy is set within the West Sussex Local Transport Plan (LTP) covering the period from 2011 up to 2026. It is the framework in which new transport infrastructure requirements are determined and planned. It has four overarching strategies:

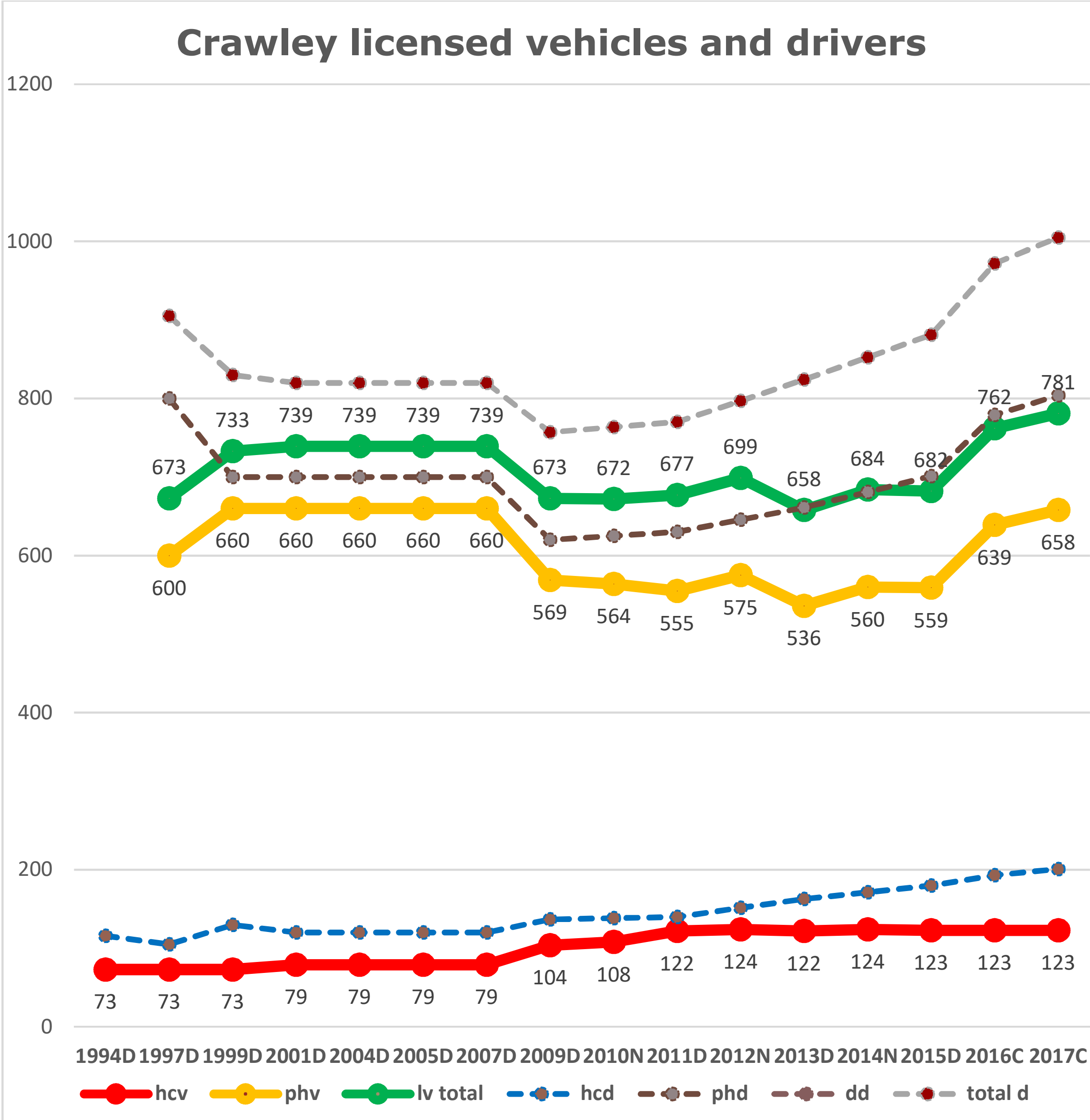
- promoting economic growth
- tackling climate change
- providing access to services, employment and housing
- improving safety, security and health.

The overall strap-line for the LTP is 'with you, for you, making the most of West Sussex'. Crawley is located in the 'Gatwick Diamond' area, an area which in the future aims to develop into a world-class, internationally recognized business location. The vision for this area is sustainable economic prosperity, good access between and into the main towns and attractions, but where access by car into the towns is progressively managed to reduce congestion. Relatively high population growth is expected, with further pressure on road capacity resulting. Like many other LTP documents, there is very little, if any, mention of either private hire or hackney carriage as they are seen to be a very minor element of overall travel.

The Crawley Implementation Plan identifies Crawley as the central hub of the Gatwick Diamond. It explains the current situation began with designation as a New Town in 1947. Population has increased well beyond expectation, with around 19% of households in 2009 not owning a car or van. Again, there is no specific mention of licensed vehicles, although there are stated aims to develop travel plans for each rail station, including redevelopment of Three Bridges and Crawley station. There is a note that bus usage has been increased (to 2011) by the Fastway service developments (see later). The lack of specific inclusion of licensed vehicles suggests they will not have any particularly priority in planning, and that they may well suffer from focus on other modes given there are no strategic or specific policies towards them in the area.

However, even as in this case when the authority has no control over its rank provision, all licensing authorities have full powers over licensing the vehicles, drivers and operators serving people within their area. Crawley Borough Council has chosen to utilize its power to limit hackney carriage vehicle numbers, although it did have a spell when the limit was not in place until returned relatively recently.

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

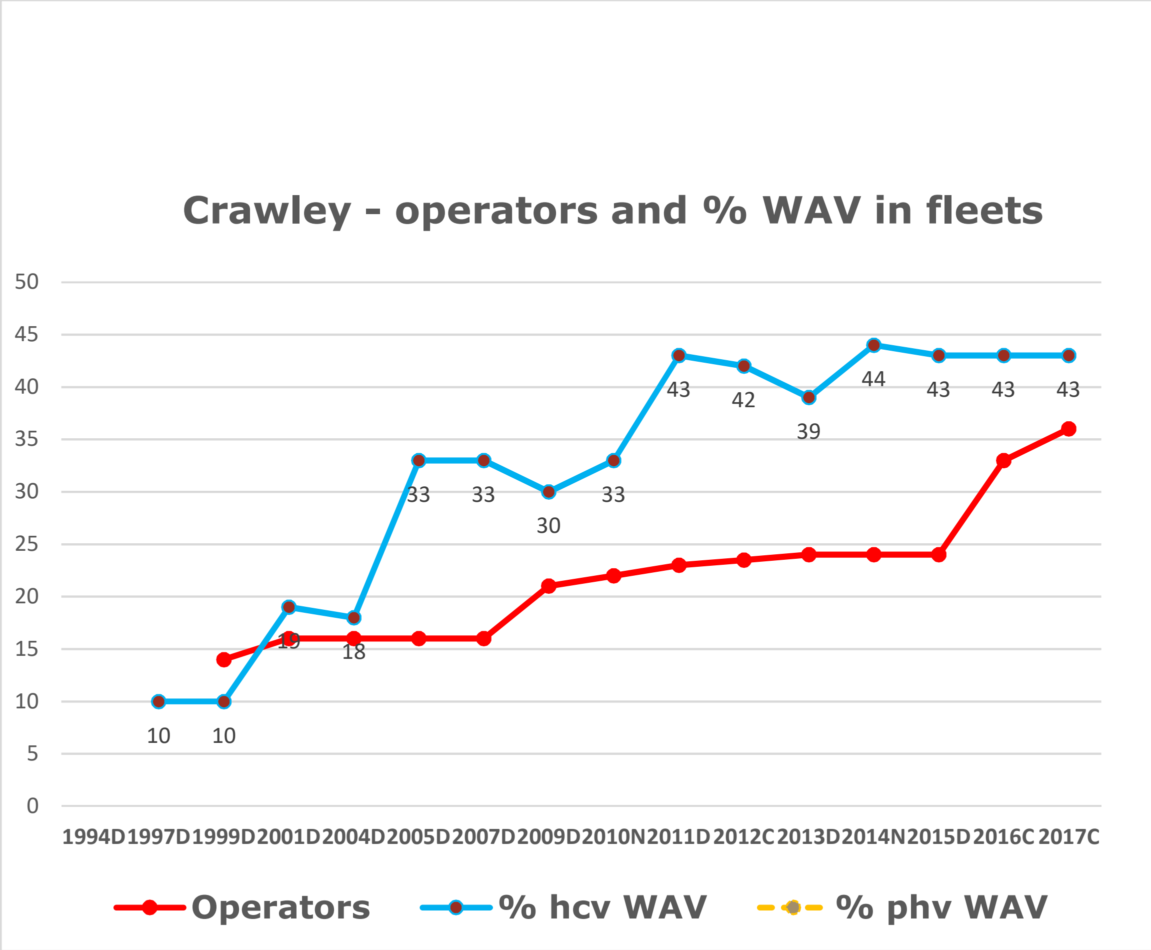


Licensing Statistics from 1994 to date

The graph above demonstrates how hackney carriage numbers rose by 54% with the period when the limit on their numbers was removed. This was matched by a fall in private hire vehicle numbers – of a maximum level of 81%, although their level had only risen in around 1999 to the peak. Private hire vehicle numbers then declined to 2013 since which they have increased again, and are now almost at the peak level they had reached before many had switched to hackney carriage.

Driver levels on both sides of the trade have been gently increasing since around 2007, with the gap between vehicle and driver numbers increasing in both fleets – very unusual compared to most other places where the opposite is tending to occur.

Information is also available from these sources to show how the level of wheel chair accessible vehicles (WAV) has varied. It must be noted that in most cases the values for the private hire side tend to be much more approximate than those on the hackney carriage side, as there is no option to mandate for private hire being wheel chair accessible. In some areas, to strengthen the ability of the public to differentiate between the two parts of the licensed vehicle trade, licensing authorities might not allow any WAV in the private hire fleet at all.



Operator numbers and levels of WAV provision in the fleet

The above graph shows one spin off from the increased hackney carriage vehicle numbers was a growth in the level of wheel chair accessible vehicles, arising from the requirement that all new vehicles were WAV. The level rose to 43% where it currently remains. Whilst there have been a small number of private hire WAV according to some sources, this has never been high so we have not presented these in the graph.

Operator numbers have grown over the period for which data exists, with more recent stronger growth in their numbers. This ties in with the recent growth in vehicle numbers on the private hire side, suggesting new companies and new vehicles and drivers added to the area, mostly since the last survey.

Crawley Borough Council undertakes regular review of its policy to limit hackney carriage vehicle numbers in line with the BPG. The previous survey was in 2014. This did not identify any significant unmet demand (in fact it found very little unmet demand per se), and allowed the limit to be retained. The 2011 survey had also concluded there was no unmet demand which was significant, which allowed the committee to decide to return a limit on vehicle numbers from September of that year.

3 Patent demand measurement (rank surveys)

As already recorded in Chapter 2, control of provision of on-street ranks in Crawley Borough Council is under the control of West Sussex County Council. It was also confirmed that all local hackney carriages are very distinct in terms of being in a white livery. Appendix 2 provides a list of ranks in Crawley Borough Council at the time of this current survey.

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

At inception, a walk-round was undertaken of the ranks in the area, as well as discussions being held at inception about the current provision and usage of ranks in the area. There is a view that the focus on the Three Bridges rail station rank is tending to increase as drivers seek to find the location that will give them most custom. It was suggested there were now often periods when there were no hackney carriages waiting at the Boulevard rank, which we found to be the case during one of two visits on our walk-round.

The Ifield Road rank remained very obvious, little abused, but believed not used by hackney carriages. Surveys were arranged to review this location.

Attempts since the last survey to introduce five new ranks have all come to nothing, with the preferred location being refused due to difficulties in revising a cycle lane which had long been established through the Boulevard along the section where the new rank had been proposed. This location was outside Lloyds Bank. Of the five ranks applied for, the only other which was approved was that in Queensway, which was put in place. However, this has not been used much and may be removed. During our walk-round we found the location was mainly being used for parking with little to suggest to those using it that it was not legitimate parking – the rank sign had been covered over and the road markings were not legible.

Some revisions of ranks are going to occur in the near future. A key opportunity will be the revision of Crawley station frontage. Only hackney carriages will be permitted on the revised frontage, with the company which was located there already having been moved elsewhere.

A further major change will occur at Three Bridges, although the revision is planned, its introduction is not imminent but will most likely occur between this survey and the next. Dependent on negotiations, this may have a significant impact at this site, although this could be a very positive one in a similar manner to that at Crawley favouring hackney carriage operations.

We were advised that the Gatwick Airport provision is on private land with a very high cost concession agreed with a private hire operator which would prove itself very difficult to revise. This is a typical situation with most airports around the country, and one which is tending to increase as airport operators seek to get guaranteed arrangements for their customers.

A revised rank observation programme was agreed at inception and is provided in Appendix 3. A total of 140 hours of observations were undertaken at seven locations across the Borough.

Overall observations at ranks

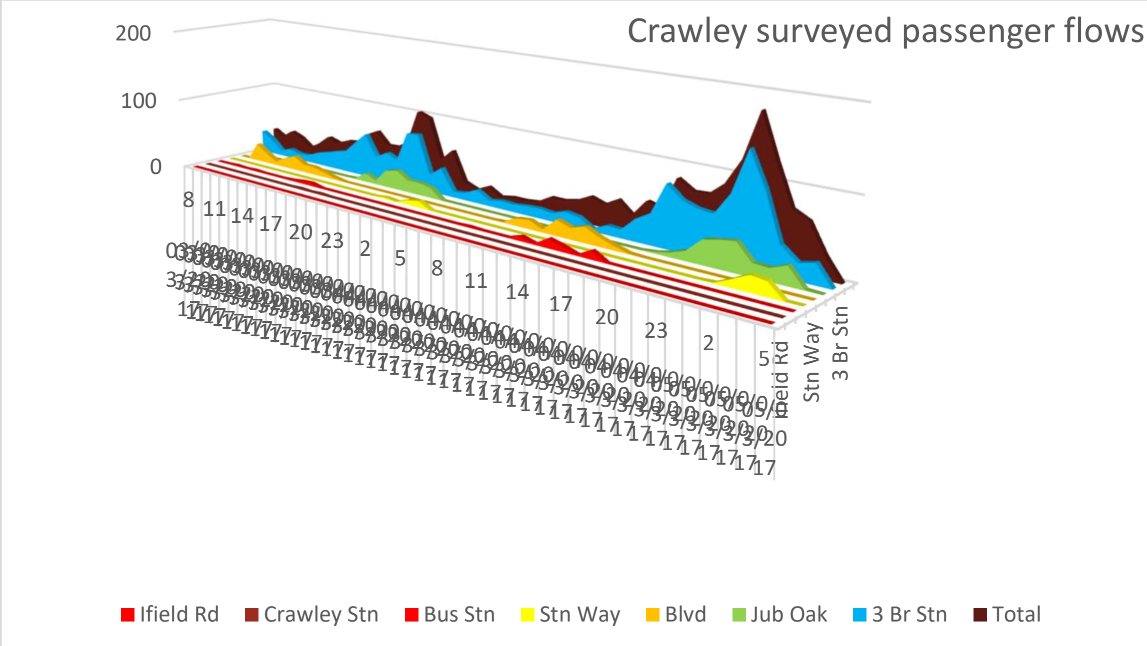
Some 5,809 different vehicle arrivals and departures were noted during the course of our observations at or near ranks in the area. Of these, 24% were private cars. A further 8% were private hire vehicles. Just 2% were goods vehicles plus a very small number of emergency vehicles. The remaining two thirds were hackney carriages.

Of the hackney carriage vehicles observed, 43% were WAV style. This is the percentage there are in the fleet, suggesting equal use of both kinds of vehicle at the ranks.

During our observations, just one person was observed accessing a hackney carriage vehicle at a rank in a wheelchair. This was at Three Bridges station. Ten other cases were observed where people appeared to have a disability. Eight of these were at the Boulevard rank, with the remaining two at Crawley railway station rank.

Observed hackney carriage operations

Our 140 hours of observation identified some 2,130 passengers leaving ranks in 1,482 hackney carriages during the period observed. A graph was produced to show these observations.



The graph demonstrates the dominance of the Three Bridges rank to usage of hackney carriages at ranks in the area. This is the only nearly all-hour active rank in the area. The Jubilee Oak rank is also important, mainly in evenings but also later in the afternoon. The Station Way rank remains important servicing the club there, with both the Boulevard and Bus Station ranks remaining contributors to demand and important to the area.

Flow in the area has a marked peak in the midnight hour on the Saturday night, one of only three hours in the whole surveyed observations with 119 or more passenger in that hour (the other two hours were the hours either side of this). The Friday peak was just 102 passengers. Most of these were at Three Bridges Station, suggesting people returning from London.

The actual observations were then factored to produce a typical full week estimate. This was also compared to those from the 2014 survey. The table below shows estimated weekly average flows. Ranks are listed in descending order of usage in 2017.

Rank	2017		2014	
	Passengers	%	Passengers	%
Three Bridges Station	4,635	73	4,478	71
Boulevard, Crawley	775	12	825	13
Jubliee Oak (High St), Crawley	721	11	352	6
Bus Station (Haslett Av), Crawley	106	2	327	5
Station Way, Crawley	66	1	270	4
Station, Crawley	16	0.0	80	1
Ifield Road, Crawley	0	0	Not there	
Total	6,319		6,330	

In 2017, the estimates confirm the dominance of Three Bridges Station, with 73% of all passengers estimated. Next busiest is the rank at the Boulevard, with 12% closely followed by the Jubilee Oak location. The Bus Station and the night rank at Station Way have 2% and 1% respectively, with the station rank in Crawley seeing some hackney carriage usage.

The Ifield Road location, added since 2014, was observed to identify any usage of this location. There was no hackney carriage activity at all.

In terms of comparison to three years ago, the two sets of estimates suggest that demand at hackney carriage ranks has remained similar. The order of importance of ranks has remained exactly the same, although there is a marginal increase in dominance of the Three Bridges rank. The Jubilee Oak rank now seems to be more important, having almost doubled estimate patronage and changed its share from 6% to 11%, although not changing its actual place in the rankings. The three ranks less used than the Jubilee Oak have all lost usage and share, a typical issue at the present time where vehicles are less willing to service lower demand locations now.

Detailed rank observations

The detailed rank observations for 2017 are contained in Appendix 4. Discussion of these is provided below, again in order of the most used rank first.

Three Bridges Station

This rank is a large, separate area located to the left of the main station exit as you leave the station, but across the car park access road and not directly outside the main station frontage (where there is a small set-down and pick-up area which currently includes a shop and a private hire booking office). The current area is effectively filled by the rank, although there is no distinct signage preventing other vehicles entering that area.

This location was observed from 08:00 on Friday 3rd March 2017 right through to 05:00 on Sunday 5th March.

Friday observations

During the Friday observations 657 passengers used the rank, leaving in 545 vehicles, a very low occupancy of just 1.2 per vehicle. A further 104 hackney carriages left the rank without passengers, some 16% of those arriving. During this day, two people had to wait up to two minutes in the 03:00 hour, but this level of waiting was negligible when shared over the large overall volume of people using the rank.

Passenger flows were never lower than seven, and saw a peak of 77 in the midnight hour, preceded by 75 in the 23:00 hour. The other high flow was 61 in the 19:00 hour. Other flows were in the 17-31 area, with a peak of 31 in the 08:00 hour. The rank did not see any hours without passengers, even into the early hours.

Vehicle wait times here can be longer, ranging from 17 to 49 minutes, with some waits up to 90 minutes, particularly during the early hours of the morning. This does reflect the popularity of this rank, but as is often the case drivers are willing to pay the wait to obtain better and more guaranteed levels of patronage than at much more moderately used locations.

Saturday observations
The observations from Saturday through to Sunday saw 844 passengers leave in 541 vehicles, a moderate occupancy of 1.6 per vehicle. These flows never saw any passenger having to wait for a vehicle to arrive. The empty departure rate was the same as Friday at 16%.

The pattern of demand was completely different on the Saturday. Daytime flows up to the 16:00 hour were just three to 17. From the 17:00 hour on flows increased to a peak of 139 in the midnight hour. There were also 96 in the 01:00 hour, and still 26 in the final hour observed, the 04:00.

Vehicle waiting times for fares were 10 to 31 minutes when the rank was busier, but much longer in the earlier part of the day, with some vehicles waiting up to 72 minutes.

Summary
This rank is clearly the busiest, but sees various different patterns of demand. It enjoys a very good service, although at times vehicles are having to wait extended times in order to enjoy the higher levels of passenger demand provided. This rank also operates all hours given the existence of an almost 24-hour rail service.

Boulevard, Crawley
The Boulevard rank is directly outside Marks and Spencer's in Crawley in a very obvious location for shoppers leaving that store and the nearby exit from the main shopping area. There is other parking around the rank which can cause issues with capacity and abuse at times. The rank was observed from 10:00 to 20:00 on Friday 3rd March 2017, and again from 09:00 until 20:00 on the Saturday, 4th March.

Friday observations

During the course of the Friday observations, 110 passengers left the rank in 78 vehicles, a low occupancy of 1.4 per vehicle. Just five vehicles left empty, 6% of those arriving at the location. There were no passengers or vehicles in the 19:00 hour at all.

During the Friday, 11 passengers arrived when no vehicle was available for immediate hire. The longest recorded wait was six minutes. People waited in the 13:00, 14:00, 15:00 and 18:00 hours, although most waits apart from that for six minutes were no more than a minute or two. When averaged over this day, the typical passenger wait was 19 seconds. Only in the 13:00 hour did the average wait time rise to over a minute.

Passenger flows varied from three up to 25, with the peak in the first hour observed (10:00). Flows at 15:00 and 16:00 were both 11, whilst after this time the highest flow was seven passengers with it being clear the area was becoming quiet.

Vehicle waits for fares varied from three to 24 minutes, depending on time of day, though the last hour saw much shorter waits related to passengers arriving when vehicles were not there. There were some vehicles noted waiting up to 40 minutes although this was much reduced in the hours towards mid-day.

Saturday observations

On the Saturday, we observed very similar numbers, with 103 passengers leaving in 77 hackney carriages, again a low occupancy of 1.3 per vehicle. A higher 14% of the vehicles arriving left empty. During this day, just five people arrived with no vehicle available, with the longest wait being five minutes in the 14:00 hour (when three others also had to wait). The other hour with a wait was the 11:00 hour, when one person waited three minutes. None of these waits led to an average wait in the hour over a minute, and the total typical wait time for the Saturday over all passengers was 14 seconds.

Passenger flows were between 1 and 21 in any hour, with two peak hours of 21 passengers each (13:00 and 15:00). Again, the area became quiet not long after 18:00 with no vehicles or passengers at all in the 19:00 hour.

Vehicle waits were between four and 14 minutes apart from in the very quiet 12:00 hour, when average vehicle wait rose to over 45 minutes, and from the 15:00 hour onwards when they were 22 minutes or more. Maximum vehicle waits of up to 52 minutes were observed.

Summary

This rank is showing symptoms of being relatively quiet – with the tendency for less vehicles being predisposed to servicing it, leading to the slight increase in people arriving when there is no vehicle there.

Jubilee Oak, High Street, Crawley

This rank is located in a lay-by directly outside the Jubilee Oak public house in High Street, Crawley. The whole lay-by is clearly marked for 'taxis' with a further bay opposite available to all vehicles. There is also a private hire office located right next to the rank. The rank was observed from 19:00 on Friday 3rd March until 03:00 on the Saturday morning, and again from 19:00 on Saturday 4th March until 06:00 on the Sunday morning.

Friday observations

On the Friday, the rank saw 116 passengers leave in 60 vehicles, a high occupancy of 1.9 per vehicle. A fifth of arriving vehicles left without passengers. No passenger ever arrived with no vehicle available for immediate hire.

Passenger flows were generally between 12 and 27, with the peak hour the 23:00 hour. However, there were some quieter hours with just one and five passengers observed. Vehicle waits varied from eight minutes up to 28, with quite a few vehicles observed waiting up to 40 minutes for passengers.

Saturday observations

During this period, there were an overall higher number of passengers, some 183 leaving in 91 vehicles, a relatively high occupancy of 2 per vehicle. 18% of arriving vehicles left without a passenger, but no passenger ever arrived to find no vehicle waiting to take them immediately.

Passenger flows rose from six to a peak of 38, and were then between 16 and 24 until the last hour when people were observed (just one person in the 04:00 hour). Vehicles average waits for passengers ranged from five to 22 minutes, with just one vehicle recorded waiting nearly 40 minutes.

Summary

This rank is busier on Saturday than Friday, but generally sees moderate levels of flow when active, and good service to those using the rank.

Bus Station, Haslett Avenue, Crawley

This rank is located on the corner of Haslett Avenue to the rear of the Crawley bus station area. Vehicles must leave the area through the bus station and towards the dual carriageway. The rank is very close to a pedestrian exit from the nearby shopping centre, but is also near to a private hire booking office. The rank was observed from 10:00 on Friday 3rd March 2017 to 20:00 that evening, and again on the Saturday 4th March 2017 from 08:00 until 20:00 that evening.

Friday observations

On the Friday, just ten people used the rank to leave in eight hackney carriages, a low occupancy of 1.3 per vehicle. Half the arriving vehicles left without passengers. No passenger ever arrived to find no vehicle waiting.

Demand here was very patchy, with the peak hour seeing just four passengers, and many just a single passenger. Some average vehicle waits were short whilst others were quite long, which together with the sporadic patronage might suggest the demand is actually hackney carriages servicing the private hire office and picking up at the rank.

Saturday observations

On the Saturday there were many more passengers – a total of 39 – leaving the rank using 24 hackney carriages. This was a moderate occupancy of 1.6 per vehicle. 46% of arriving hackney carriages however left empty. Unlike the Friday, passenger flows were higher and occurred in every hour from 12:00 through to the 17:00 hour. There were still very quiet hours with just one passenger, but the peaks were 12 in the 14:00 hour and 11 in the 17:00. There were no occasions when anyone arrived without a vehicle being there.

Vehicle waits were on average between 12 and 26 minutes to leave with a fare. One vehicle was observed waiting 45 minutes before leaving.

Summary

This rank only appears to operate fully on a Saturday, and is very clearly serving shopping demand only. When demand is very low, there is evidence it may not actually be operating as a classic rank.

Station Way, Crawley

This rank is on the southern carriageway of Station Way directly outside the Moka night club. There is a parking area on the club side of the pavement area but the rank itself is on public highway and faces the railway station. The location was observed on Friday 3rd March 2017 from 22:00 to 04:00 and again on the Saturday night 4th March 2017 from 22:00 until 05:00 early the next morning.

Friday observations

The rank on the Friday saw just 17 passengers leave in 16 vehicles, a very low occupancy of just 1.1 per vehicle. 36%, some nine other vehicles, left without taking passengers. No passenger ever arrived when no vehicle was available immediately.

Main activity was in the 02:00 and 03:00 hours although two people used the rank in the midnight hour. It was clear that some vehicles waited for the closing time of the venue, with relatively long waiting times observed for at least one if not several vehicles.

Saturday observations

The Saturday saw passengers over four consecutive hours, giving a total of 49 people leaving in 40 vehicles, a very low average occupancy of 1.2 per vehicle. Flows rose from one in the midnight hour to 20 peak in the 02:00 hour, dropping to 18 in the 03:00 hour after which it became quiet. 23% of the vehicles arriving left the area without passengers (but these were mainly in the quieter midnight hour). Again, there were no passengers arriving without being able to take vehicles immediately.

Average vehicle waits varied from six to 17 minutes, with one longest wait recorded of nearly 35 minutes.

Summary

The rank focusses on serving departing customers from the club, although some vehicles do appear to arrive in advance of expected departure times, particularly on quieter nights.

Station, Crawley

At the time of undertaking our surveys, this rank was located directly outside the station entrance in the small car park area between the station and Station Way. The bays are parallel to the foot of the station steps and marked as three separate bays. There are also other bays, marked at right angles to the kerb, noted for use of Crawley Cars only (although we understood this operation was drawing to a close). The hackney carriages spaces were observed on Friday 3rd March 2017 from 12:00 through to 01:00, with the last train expected to arrive at 00:43.

During the observed day, just two passengers left in two hackney carriages. Three other vehicles, 60% of those arriving, left without passengers. Demand was split between the 18:00 and 20:00 hours, with no other passengers leaving by hackney carriage. The empty vehicles were in the 16:00 and 22:00 hours. Effectively, this rank is not really used by hackney carriages.

Ifield Road, Crawley

This location is in the stub end of Ifield Road with pedestrian access through to the High Street, not far from several of the night venues there. Though the road markings remain clear, the sign is partly obscured and access is by returning to the main loop road by a u-turn just beyond the rank. The rank was observed on Saturday 4th March 2017 from 20:00 to 03:00 on the Sunday morning. During that period just one hackney carriage arrived, waited five minutes and then left without passengers (in the 01:00 hour).

Activity of vehicles

A survey was undertaken to identify a sample of vehicle activity at key locations near to the main ranks. The review covered sample periods during the Friday. Some 294 different hackney carriage movements were observed during the sample period. This accounted for some 59% of the available hackney carriages.

In terms of locations, one vehicle was only observed during our survey sample at the Boulevard rank, and a further five were only observed at the Jubilee Oak. The vast majority were seen across all ranks, although there was a clear focus on the busiest location at Three Bridges.

The period when most plates were observed was that from 18:30 to 20:30, possibly corresponding with commuter arrivals at the end of the week. This corresponded to 41% of all plates, and nearly 70% of all those observed active during our sample. The observations around the midnight hour at the Jubliee Oak identified about a third of the overall plates active, and one in five of the total fleet.

This sample does suggest a highly active fleet of vehicles, although it also still shows some spare capacity available within the fleet even at busy times. There is no evidence of any playing up of the fleet to the survey. There are also some clear tendencies for vehicles to operate from Three Bridges, although the demand there is such that the volume of concentration is also needed.

4 General public views

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

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

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

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

It is normal practice to compare the resulting gender and age structure to the latest available local and national census proportions to identify if the sample has become biased in any way.

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

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

For Crawley, a total of 225 people were interviewed in Crawley town centre and also near to the exit of Three Bridges Station. A total of 225 people were intercepted and provided responses to the questions.

Interviewees were asked if they had used a licensed vehicle in the last three months in the area. A very low 26% said they had. The proportion was higher for the Three Bridges station sample, 37% and lower for those in Crawley itself (just 20%).

People told us how often they used licensed vehicles in the area. Overall usage was about one trip per person per month, very low. This was lower than the previous survey, which found around 1.5 trips per person per month, again still not particularly high. The value for pure hackney carriage use was much lower, just 0.1%, although the value in 2014 had been around 0.8 (albeit via a slightly different question). 82% of people could not remember when they last used a hackney carriage. However, a strong positive was that just 2% said they could not remember seeing a hackney carriage. This suggests the livery does mean people are aware of hackney carriages, but do not use them.

Some people told us how they got a licensed vehicle in the area. Of those responding, 49% said they phoned for one, 33% got one through using their smart phone, 15% got them at ranks and just 1% hailed. None said they use apps, and 2% said they went to a booking office. The 15% at ranks is slightly more than the estimate based on usage (which suggests a 10% split).

People told us companies they phoned. Just five were mentioned, with one obtaining 49% of all mentions. The next two obtained 25% and 23% respectively whilst the other two only obtained a single mention each (about 1.5% each of the total). This suggests low levels of competition in the area, although there is not just one very strongly dominant company.

People were then asked about ranks they were aware of. Just ten people answered, providing 18 responses, very low. However, of these responses over half said they used the rank(s) they named. 34% mentioned either the bus station or McDonalds (the same location), 28% mentioned Crawley station and 22% the Boulevard. Just one response was for Three Bridges station. Unsurprisingly, there were no responses about potential new ranks. One person said they thought there were sufficient ranks.

Just one person said they had an issue with the taxi service, delay getting a vehicle. However, in response to if people felt they could get hackney carriages when they needed them, 16 people provided a total of 29 responses. Of these, 34% were hackney carriages were available in the daytime, 24% at night and 21% equally for both phoning and for from the town centre. None said they could never get them. This is consistent with 2014 when it was also concluded that most people wanting hackney carriages could get them when they needed them.

The small response about what might make people use hackney carriages more focused on them being cheaper. The only other matter which might encourage people to use hackney carriages more was if there were more accessible by phone.

No-one said they had ever given up waiting for a hackney carriage in the Crawley area. 38% of all respondents took time to respond this way, suggesting a clear view that people could get hackney carriages if they wished without waiting.

84% of those responding did not have any requirement, nor did they know anyone who had any requirement for an adapted licensed vehicle. For those who did, the focus was towards needing WAV style, although about half as many said they would need non WAV adapted vehicles. 85 people responded to the question if they felt disabled persons travelling in Crawley got a good service from hackney carriages. Of these, 20% said they did not know, whilst 74% said they felt people did get a good service.

Regular car access was available to 55% of those responding. 71% said they lived in the area (quite low). Compared to the census, we interviewed slightly more males (52% compared to 49% in census), and slightly more of the older group (35% compared to 30%) with the corresponding reduction being in the middle group (41% compared to 47%). We obtained 24% of the younger group compared to 23% in the census.

Details of the overall results are provided in Appendix 5.

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5 Key stakeholder consultation

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

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

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

Our information was obtained by telephone, email, letter or face to face meeting as appropriate. The list contacted includes those suggested by the Council, those drawn from previous similar surveys, and from general internet trawls for information. Our target stakeholders are as far as possible drawn from across the entire licensing area to ensure the review covers the full area and not just specific parts or areas. Full details are provided in Appendix 6.

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

Where the statistical analyses in Chapter 2 demonstrate low levels of wheelchair accessible vehicle (WAV) provision, an increased emphasis will be given to the issue in terms of the focus of stakeholders but also in specific efforts to contact disabled users and their representatives.

Supermarkets

A sample of five supermarkets were contacted. One was not contactable whilst two others did not respond within the time available. Both that responded told us their customers did use licensed vehicles, both using free phone links. One considered they had a rank in their car park, which was in fact a private space marked on supermarket land. None had ever received complaints from customers about the service provided.

Hotels

A sample of six hotels were contacted. During the time available three did not reply. All three that did respond said their customers did use licensed vehicles, and that staff would phone for a vehicle if a customer asked them. None were aware of ranks nor of any complaints from customers about the service.

Public houses

Six public houses were contacted. Five told us that their customers did use licensed vehicles. Three said they understood that customers contacted vehicles directly whilst one said staff would phone if asked. The other said that people often called themselves but that staff would call if asked. Two were aware of the High Street rank. Two were not aware of any ranks. One cited a private hire office as a rank. None had received any comment from their customers about the service provided.

Night clubs

Four night clubs were contacted. Two told us their customers did use licensed vehicles, both saying they obtained them at ranks. They named the station rank and the High Street rank, although one did have a rank directly outside which they did not mention. None had received any issues from customers.

Other entertainment venues

A sample of three different types of entertainment venue were contacted. Just one responded, saying that the customers did use licensed vehicles but tended to phone for them directly. They had not received any complaints or comments about the service.

Restaurants

A sample of five restaurants were contacted. Two told us that their customers used licensed vehicles. One said their staff would book vehicles if asked, the other said that customers contacted companies themselves. This location was also aware of the High Street rank. None had received any comment about the service provided from their customers.

Hospitals

No issues were reported to us by the hospitals in the area.

Police

The police had no comment regarding any issues with hackney carriage or private hire services.

Disability

There were no comments from a range of disability groups contacted.

Rail and other transport operators

A representative from Gatwick Airport told us they keep their hackney carriage / private hire provision under continual review through service level agreements and key performance indicators. This is supported by regular three to five year reviews of who holds the contract. They felt that the service provided was currently servicing customer need.

No other transport providers had any comment.

Other Council contacts

The Town Centre manager for Crawley told us there are always vehicles at the town centre ranks and that lack of vehicles only ever occurs for short periods. They had not received any feedback from visitors about either hackney carriage or private hire services provided.

Mystery wheel chair shopper

A set of journeys were undertaken to test the response of hackney carriage drivers to the need for a person to travel in a wheel chair. The survey was undertaken on a Tuesday and a Thursday, with three trips from Three Bridges Station in each case. Destinations were chosen from Crawley Town Hall, Crawley Post Office and Morrisons. Records were also kept of the return journey.

On the Tuesday, the first trip saw the passenger having to transfer from their wheel chair as the driver said their loading ramps were not working. The second trip from the station received a refusal by the first driver, but acceptance by the second. The third trip was not refused, but the wheel chair was not secured properly (the only time this occurred during all trips made). The Thursday experience saw no direct refusals, although the final trip saw the passenger set down at a distance from the supermarket entrance with the explanation that the vehicle could not go under the car park barrier.

In terms of service provided, all drivers serving the passenger were friendly and helpful. All but one journey saw the person feel they had been loaded correctly and safely, and properly secured. Fares charged were always the price on arrival, although all drivers left the meter running while they unloaded the passenger.

In terms of return journeys, on the Tuesday all three trips saw the driver tell the passenger they could not return to collect them even though they were asked to return in half an hour. One said they had a contract booking whilst the other two simply said they did not know where they would be. In the latter two cases both offered a company number to phone.

In one case, the passenger then waited at a rank but with no WAV style vehicles within 25 minutes they phoned the company they had been given the number for. The telephone operator tried to persuade them to use a non WAV vehicle, but when the passenger persisted in their request, a WAV arrived – within five minutes. In the second case, towards early evening, the person obtained a WAV from a rank after a ten minute wait.

On the Thursday all return journeys were suggested by and delivered by the driver taking the person from Three Bridges station in each case. However, on this day drivers also tended to be outside their vehicles talking to each other at the station when all journeys were begun and they admitted to being aware of the person travelling and their needs. This suggests that a good service is possible but cannot be guaranteed.

6 Trade stakeholder views

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

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

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

In all cases, we believe it is essential we document the method used clearly and measure response levels. Our questionnaire and explanation letter was issued to the trade by the Council. A total of 85 responses were received, of which 38 were sent by post and the remainder entered electronically. Initial review of the data received suggested no duplication of entries and that all were valid responses to the survey. Many took time to provide additional written submissions to their returns.

Of those responding, 61% said they drove hackney carriage vehicles and 1% said they drove both hackney carriage and private hire. The remaining 38% said they drove private hire. This suggests a good response from both parts of the trade, with an emphasis on hackney carriage response as would be expected.

The full set of responses saw an average length of service in the local trade as just under 12 years, with the longest reported period being 43 years. This is a good level of experience.

In terms of recent hours worked, 47% said they worked six days and 35% five days. 6% had worked the last seven days whilst 1% had worked two days, 5% three days and 6% four days. This shows a focus on five to six days. Average hours worked were 41, with the longest quoted being 75 hours. The average level of hours worked seems low compared to other areas.

Many told us the issues that affected their choice of shift. 34% said they tended to work when demand was highest. However, 19% of responses were that people did avoid times when traffic congestion existed, with 18% working around family commitments. 3% avoided awkward customers, but none said they were restricted by sharing their vehicle.

Of those responding, only one person said that someone else drove their vehicle at times they were not using it, mirroring the response that no-one was restricted by sharing a vehicle.

34% of those responding said they worked on some form of telephone circuit. Nine different circuits were named, although five were only mentioned once. The largest mention was by six people, with another company obtaining five and another four mentions. The company with five mentions was only listed by hackney carriage drivers, with three others only mentioned by hackney carriages. One hackney carriage driver said they worked for a company which also had private hire drivers. This suggests a relatively separate hackney carriage and private hire fleet from these results.

In terms of rank served, all the used ranks in the area were mentioned. Some private hire (and one hackney carriage) said they serviced Gatwick Airport (6% of responses). The largest number of mentions of a rank was Three Bridges Station which obtained 34% of all replies. The Boulevard rank was next with 21%, High Street with 14%. The Haslett Avenue rank was mentioned in two different guises, as either County Mall or McDonalds, obtaining in total some 13% of responses.

4% said Crawley station rank, although one private hire mentioned this because it was where their base was. 3% said they serviced the Moka rank. One person said they serviced all ranks whilst another (private hire) said they serviced their company base which they considered a rank.

Concerns raised about ranks focused on 45% of the mentions being a lack of ranks and total space, whilst 36% said they were concerned about a private hire base being near to the High Street rank. 7% were concerned about private vehicles abusing ranks and 4% felt stewards were needed when it was busy. Other comments were made by smaller numbers.

All but a few responded to the main method they obtained fares. 59%, far the biggest number, mainly obtained fares from ranks, in fact very similar to the number who said they were hackney carriage drivers. 1% said they were hailed, and 19% obtained most work from phone bookings. 7% had private contracts whilst 13% had school contracts as their main source of fares.

A few less responded in regard to the question about the limit. 87% said it remained the correct policy. This included a good number of private hire drivers, although some hackney carriage either did not answer, or disagreed. Some private hire felt they also needed a limit on both their vehicle numbers and the number of drivers.

The largest reason given why people felt this benefitted the public is that they felt it meant hackney carriages were always available at ranks (37% of responses), followed by its impact on ensuring clean, safe and well-maintained vehicles (26%). 16% of responses were that it reduced the level of over tired drivers with a similar number saying it reduced pollution and congestion.

Many comments were made, mostly explaining the feeling there was not enough work and that the previous issue of plates had reduced income significantly. There were others, however, who were drivers who wanted their own vehicle, but only a few. Many reiterated comments made in response to other questions, particularly about rank abuse and having private hire booking offices not far from a rank, citing three main examples.

Several appeared to have agreed a set of four requests, one of which was not having private hire offices within a certain distance of any rank (as done in Mid Sussex council area), the first request being that no more plates be issued.

There were a small number of requests for additional, mainly night ranks, or more spaces near to the Boulevard rank, which could often see more vehicles than spaces.

Several sought a rank at Gatwick Airport, citing the need for wheel chair accessible vehicles. However, this is a private area without any council highway access, so that such a request would need primary legislation which would be very hard to apply to a private company on private land (which was however discussed by the Law Commission review).

As with the previous trade survey there was one formal complaint that the questionnaire had been issued to private hire drivers, although this time there did not appear to be as strong a boycott as was experienced in the previous trade response (where the highest response was from private hire).

The complaint was carefully dealt with, with the explanation that the Best Practice Guidance requires all in the trade to be consulted (both hackney carriage and private hire), and the issue that private hire may well be those who are being restricted by the current policy and who may wish to challenge this, and therefore need to be given opportunity to share their views. In the event, there was general strong support from the private hire trade for the limit, and many felt a limit was needed on their numbers as well.

Overall, the local licensed vehicle trade clearly has strong interest in providing relevant comment, which is not always the case, and is therefore refreshing and encouraging.

7 Impact of other options on use of hackney carriages

Hackney carriages are a very specific form of transport – the only vehicles which people can legally get into directly at ranks, or in the street. However, there is a continuum between private and public transport within which hackney carriages sit as well as various other options. This section considers factors which impinge on usage of hackney carriages and how these influence their specific usage within Crawley Borough Council's area, and how and where changes to other related transport revise the fortunes of hackney carriage usage.

The cost of travel is a principal determinant of the length and frequency of trips made. For hackney carriages, nearly all licensing authorities in England stipulate the level of fares, whereas this is not legally possible for other forms of transport including the private hire vehicle. It is therefore important to review the level and structure of hackney carriage fares per se as part of understanding usage levels.

However, even in terms of cost, the hackney carriage market is far from being a perfect market, or experiencing perfect competition. This is because people can choose a private hire vehicle which may appear to do the same job but is in fact under different regulations. The edge between a hackney carriage and private hire service has blurred with the instigation firstly of booking offices at or near to ranks, then by introduction of phone links, then by the mobile phone, and most recently by introduction of 'apps'. All of these take the private hire user closer to the immediate hiring ability of the hackney carriage at places where active ranks exist.

More recent years have also seen a growing focus on 'sustainable travel' which encourages where possible people to make use of transport with larger capacity, which is often taken to mean buses, with some assuming that hackney carriage and private hire are in fact less sustainable. This ignores the fact that for many the choice of sustainable transport would never include higher capacity, meaning the choice is private single occupancy car or rail plus licensed vehicle. Some Local Transport Plans accept this principle, many simply ignore the licensed vehicle. This focus on sustainable transport has seen a high level of investment in bus services, and encouragement for bus operators to increase their patronage by service improvements, some of which include fare initiatives, which can impact particularly on some higher demand routes which may otherwise be a key area that licensed vehicles might see as a market.

Hackney carriage fares

For Crawley, the last fare increase was in January 2014, prior to the last survey. At that time the level of fare, £6-60 for a typical two-mile Tariff 1 journey, put the authority 20th in the list of 365 licensing authorities in Great Britain. The March 2017 Private Hire and Taxi Monthly industry standard comparison places Crawley in the group that are 31st equal, showing the fact that many other places have seen fare increases in those three years, though some places have also more recently seen fare reductions. This implies that hackney carriage fares per se will not have had any impact on demand for their services comparing now with the previous survey.

Private hire fares and services

For many, private hire vehicles, often known as mini-cabs (and more so in Crawley given the proximity of London where the term is much more widely used), are often preferred to hackney carriages, mainly on the basis of price, but also in terms of availability (and particularly certainty of availability). The review from the last survey of comparative private hire journey costs has been revised. One change from 2014 was that at that time it was relatively easy to get on-line quotes for fares. Now, most such fares need either use of an app for which you are registered, or a very specific booking made via email using addresses, which is harder to undertake on a distant research basis. Results are shown below.

Journey Origin	Journey Destination	Distance (km)	Estimated journey time (minutes)	Telephone Booking Fares: Maximum telephone booking fare	Telephone Booking Fares: Minimum telephone booking fare	Distance based Hackney Carriage fare	2014 hackney carriage premium to cheapest pvh fare	2017 hackney carriage premium	Single bus fare
Crawley Railway Station RH10 1JA	Three Bridges Station, RH10 1LY	2.2	6	£4.80	£4.20	£5.20	37%	24%	£1.60
Crawley Railway Station RH10 1JA	Langley Green Hospital, RH11 7EJ	2.8	7	£4.60	£4.50	£6.00	38%	33%	£1.60
Crawley Railway Station RH10 1JA	Henderson Road, Broadfield, CRAWLEY, RH11 9HY	3.8	8	£6.40	£6.30	£7.40	35%	17%	£2.40
Crawley Railway Station RH10 1JA	The Squires Pease Pottage, Crawley RH11 9BU	4.5	8	£8.40	£8.00	£8.40	20%	5%	£2.40
Crawley Railway Station RH10 1JA	Gatwick Airport South Terminal, RH6 0NP	9.6	12	£12.00	£10.50	£15.80	98%	50%	£2.40

The results show that hackney carriage range from being 5% more expensive than a booked private hire up to 50% more expensive. However, compared to the previous survey results, the difference has significantly reduced from the range of 20% to 98% last time. This does suggest that private hire prices have increased where those for hackney carriages have not, which could imply more usage of hackney carriage on a pure price basis where other factors perhaps lessen the impact of the cost element.

For many, the key issue is certainty of availability. This is important for those arriving at interchanges from other transport, mainly railway stations, for those wanting to go home from supermarkets with perishable shopping, or for those with special needs. Such requirements often tip the balance towards use of a private hire licensed vehicle rather than a hackney carriage unless there is a very accessible and active hackney carriage rank. There are places, such as Liverpool, where even supermarket licensed vehicle provision focusses on the hackney carriage, but this is far from the norm.

For Crawley, there are no ranks at supermarkets, with most provision being by dedicated phone to a private hire company. This element of competition has been very strong in Crawley, with both main rail stations having booking offices within the station premises as well as ranks. This factor has become even stronger with a number of offices near to key ranks, although the Boulevard rank does not suffer from this issue and should therefore see more hackney carriage usage than the other daytime central rank which has an office near. Future developments will reduce offices near to ranks, particularly at the two stations, which is another opportunity for hackney carriages to regain custom previously lost.

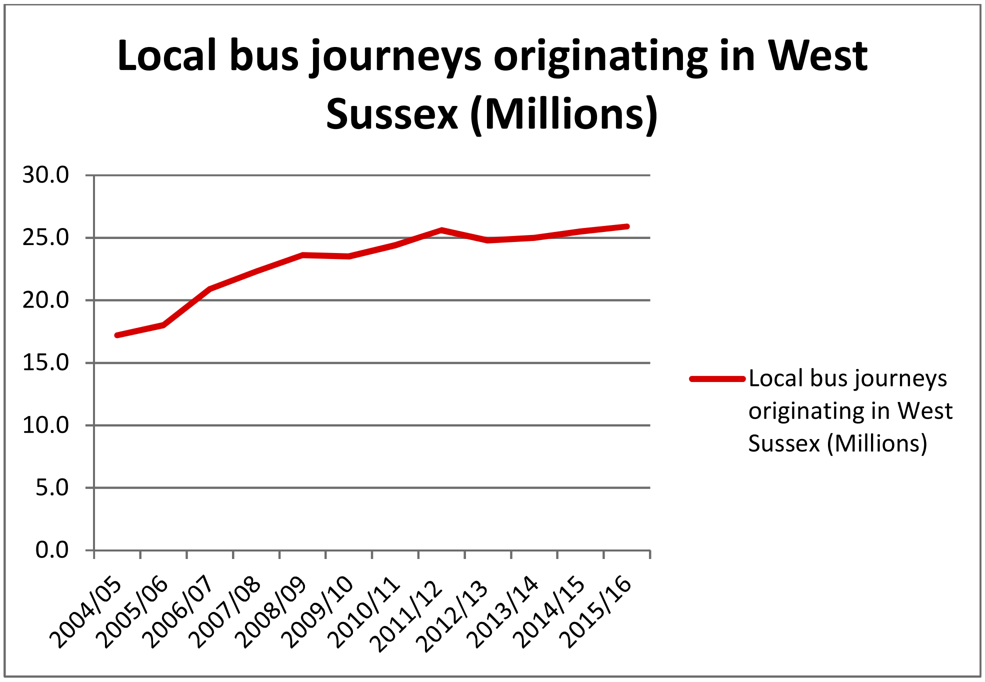
In some authorities, this competition has been countered by hackney carriage also being part of radio circuits, either as mixed private hire / hackney carriage fleets, or in some cases dedicated hackney carriage radio networks, as seen in many major centres. In some areas more recently, hackney carriage vehicles and their drivers have allied themselves to private hire networks to provide them with more certain levels of activity particularly when some ranks provide relatively low levels of overall demand.

Bus fares and services

With activity related to improving sustainable access to Gatwick Airport, local Crawley bus services have seen continual attempts to increase service levels and patronage. This can draw passengers away from both private hire and hackney carriages, although the key issue here may not always be cost, but can be frequency. This can favour hackney carriage and private hire in some instances where bus services are used in one direction where people can better plan departure times (e.g. from home) whereas the return trip may not as easily fit the bus timetable. In such cases, people may choose to use a hackney carriage from a nearby active rank, or a booked private hire, to reduce the uncertainty and help get perishable or heavy goods home more conveniently.

Since the last survey, local bus services have seen several attempts at improvement related to encouraging sustainable travel to Gatwick Airport and from rail links. This has seen the local minimum bus fare reduced from £1-70 to £1-60, although the next fare up has increased from £2-20 to £2-40, although regular travelers can use various options to reduce the fare paid. This suggests that some medium distance journeys may now tend towards use of licensed vehicle, although the bus now has increased advantage for shorter distances.

The graph below shows an update of the information provided in 2014 regarding local bus journeys. This shows an increase in local bus journeys in the data currently available, and most certainly also a growth in usage since the last survey, which may have reduced the potential number of hackney carriage trips further given the better services being provided.



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8 Evaluation of unmet demand and its significance

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

For the 2017 Crawley survey, average passenger delay is just 0.03 minutes. 10% of the observed off peaks hours saw passenger queues, but only 0.7% of passengers travelled in hours when there was an average wait of over a minute. The area demonstrates peaky demand, resulting in a factor of 0.5 being used. Both seasonal factors and latent factors are both 1, resulting in an ISUD factor value of 0.12, almost negligible, and a long way from the cut-off of 80 that would suggest the observed unmet demand might be significant. This permits the authority to retain its current policy of limiting vehicle numbers, and also allows the number of vehicles to remain unchanged.

ISUD component	2017	2014
Average passenger delay	0.03	0.017
Off peak hours with any queues	10	2.3
% of passengers travelling in hours with average queue over a minute	0.7	Zero
Seasonal factor	1.0	1.2
Peak factor	0.5	1.0
Latent demand factor	1.0	1.137
Overall ISUD index estimate	0.12	Zero

Compared to the previous survey, most of the factors have tended towards increasing the significance of the observed unmet demand, albeit at very low levels of increase. However, latent demand has trended the opposite way with that element reducing to zero. However, all values remain very far from any that suggest there are any vehicle shortages in the area.

9 Summary, synthesis and study conclusions

This Unmet demand survey on behalf of Crawley Borough Council has been undertaken following the guidance of the BPG and other recent case history regarding unmet demand and its significance. This chapter summarises each of the separate chapters above, provides a synthesis comparing these results and then provides study conclusions. Chapter 10 provides the recommendations based on these.

Background

Crawley Borough Council is responsible for licensing of hackney carriage and private hire, but the highway (rank) and transport functions are undertaken at the higher tier, West Sussex County council level. Our survey was carried out between February and May 2017. Most on-the-ground surveys were undertaken in March 2017. The current Local Transport Plan (LTP) contains little reference to licensed vehicles. The main element of the overarching policies that may impact is the desire to have Station Travel Plans (STP) for each local station, which need to include adequate provision for licensed vehicles, and may need the input of the licensing section, which may not be sought.

Crawley, like several other licensing areas, has had a period from 2002 to 2012 when there was no limit on hackney carriage vehicle numbers, although the quantity control was in fact replaced by quality control requiring any new vehicle to be a WAV style, albeit of quite a wide range of vehicle types. This led to the increase of the proportion of WAV in the hackney carriage fleet from 10% up to the current 43%.

There has been recent growth in private hire vehicle and operator numbers in the area.

Since the survey which facilitated return of the limit in 2011, there has been a regular three-yearly cycle of reviews, of which this is the latest.

Rank observations

Some 140 hours were observed at the ranks in the area, covering seven locations, with other locations visited during the inception period to understand their potential for use and reasons for non-use.

Of all the observations of vehicles at or near the ranks, 24% were private cars, 8% were private hire vehicles, 2% goods vehicles and a small number of emergency vehicles. This meant two thirds of our vehicle observations were hackney carriage. Of these, 43% were WAV style which suggests that the WAV are used in a similar manner to all vehicles in the fleet.

Just one person was observed using a wheel chair to access a hackney carriage, at the Three Bridges station rank. Ten others were observed arriving at ranks with apparent disabilities other than those needing a wheel chair, with the bulk at the Boulevard rank and two at Crawley railway station rank.

The rank observations identify Three Bridges as the dominant rank. Only this rank is active at all times. The Jubilee Oak rank is important from late afternoon until the early hours. The Station Way rank retains its club operations whilst the Boulevard and Bus Station ranks are also used. The pattern of demand shows a marked peak in the midnight hour on the Saturday.

Demand in other hours tends to be overall much lower than the three peak hours that have over 119 passengers. Friday saw a peak of just 102.

When estimates of average weekly usage were produced, the dominance of Three Bridges station was confirmed at around 73% of an estimated weekly total. The Boulevard sees 12% and the Jubilee Oak 11%. The bus station rank sees just 2% of estimated passengers and the Station Way rank 1%. Crawley station rank saw some use, but of a very minor nature. Ifield Road was not used, as expected, visited by just one vehicle but no passengers.

Since the last survey, demand has become more focused on the top three ranks, with overall levels of demand about the same. This is a healthy level of change compared to many places which continue to see hackney carriage rank usage declining. However, the area tends to see very low overall vehicle occupancies.

Review of the activity level of the fleet on the Friday of the survey found 59% of the vehicles out meeting the demand on that day. The main focus of vehicles was at Three Bridges, but most vehicles were seen at all ranks with just a small number only observed at one or other location. The busiest period for vehicles being active was 18:30 to 20:30. Midnight activity appeared to require around 20% of the fleet. This suggests there is still a good level of spare capacity in the fleet, although Saturday is the key peak night.

On street public inputs

225 people were interviewed in the streets of Crawley, including some near Three Bridges station exit. A very low 26% of the interviewees had used a licensed vehicle in the last three months, lower in Crawley than at Three Bridges station. With 82% not remembering when they had last used a hackney carriage, the average 1.5 trips per person per month by overall licensed vehicles fell to just 0.1 trips for hackney carriages.

However, only 2% could not remember seeing hackney carriages, so they are clearly visible given the livery. 15% said their main method of getting licensed vehicles was at a rank. Most vehicles were phoned for, with low levels of competition but shared between the three main companies, although one has more than the other two.

Over half those saying they knew about ranks actually used them, with most mentions for the Bus Station / McDonalds, the next being Crawley Station followed by the Boulevard. There was only one mention of the Three Bridges Station rank. No new ranks were suggested.

There appeared to be general satisfaction with the service provided, and low latent demand, with most saying they could get hackney carriages if they wanted them (the main issue being most people did not want them).

Key stakeholder inputs

Most key stakeholders tended to see their customers use private hire vehicles. Only night clubs were aware of customers using ranks. Many when asked about ranks mentioned private hire booking offices as places their customers would go to get licensed vehicles.

Two days of wheel chair mystery shopper identified a wide range of excuses for not being able to service a person travelling in their wheel chair. However, once the person obtained a driver willing to take them, the service was good, apart from one trip where the chair was not properly restrained. There was evidence that the testing was expected on the second day, which proved that good service could be obtained if provided, but that it was too easy to obtain a poor experience and service.

Given that just one person was seen in a wheel chair at ranks during the rank observations, the low level of usage may not be helping a service to be provided when needed due to lack of experience, and potential fears of the difficulty of providing that service. However, the second day did prove that a good service was possible and could be provided.

Trade inputs

A good response was obtained from both hackney carriage and private hire drivers. A good level of experience was identified. Drivers focused on working five to six days, with an average of 41 hours, low compared to other areas. Results suggested the hackney carriage and private hire trades are relatively separate even though many hackney carriages do take telephone bookings. Three Bridges station was the most popular rank followed by the Boulevard and then High Street.

Main concerns related to need for more rank space at busy locations and private hire competition. 59% mainly got fares from ranks.

87% felt retaining the limit was the correct policy, including many from the private hire side. The main reasons drivers felt this benefitted the public was that it ensured vehicles were always at ranks and allowed better maintenance and cleanliness by protecting remuneration.

A complaint was received that private hire had been involved in the trade survey, but this was carefully and courteously explained to the individual.

Unmet demand industry standard test

The industry standard index of significance of unmet demand (ISUD) showed an almost negligible value. However, most components of the index had increased since the zero value obtained by the index three years ago. The main change was increasing expectation of queues in off peak periods, a symptom of vehicles working on telephone circuits at points of lower demand.

Other considerations

The impact of fares was likely to have reduced in the area since the last survey as others have seen fare increases and Crawley has not.

The impact of private hire competition was found to be less, with the private hire fares much closer to hackney carriage ones than at the time of the last survey. However, the issue of booking offices near to ranks remains, but is likely to reduce with station redevelopments focusing licensed vehicle provision on ranks rather than offices. However, the introduction of station travel plans could assist this development, but could also encourage other modes compared to the licensed vehicle (eg walking, cycling and buses).

Since the last survey, improvements to bus services have led to increased patronage, which may have reduced hackney carriage and private hire usage given the focus on improved frequencies of the bus services provided.

Synthesis

Overall, there appears to have been a trend towards vehicles servicing the main rank at Three Bridges station, with a noticeable reduction of service to customers elsewhere, as identified by the changes to the ISUD index components. There is also increasing meeting of demand by hackney carriages working on telephone bookings. Hackney carriages are obvious to people, and appear to be less expensive compared to private hire than before, but are tending to see less usage where demand is already low, compounding the focus on the main rank.

However, hackney carriages still provide a very important service to both daytime and night time passengers across the Borough. The maintenance of the overall level of demand is creditable given experience elsewhere, and more so given the overall low level of demand for licensed vehicles per se.

Conclusions

There is no evidence of any unmet demand, latent or patent, which is significant at this point in time in the Crawley Borough licensing area. This provides the possibility of retaining the current limit on vehicle numbers and keeping the vehicle level at the current number. This policy could be defended if necessary.

However, there is a major issue with service to those needing to travel in their wheel chairs. Whilst part of the issue may be the very low level of demand, the fact that one day saw an exemplary service compared to another which gave significant cause for concern, suggests that drivers must provide consistency and that a further programme of regular wheel chair mystery shopping may be needed.

The application of sections 165/167 of the Equality Act through a clear listing of WAV accessible vehicles may be a way forward as this will mean stronger enforcement will be possible. This would also need encouragement of response from and record of any refusals or poor service to those in wheel chairs, particularly at Three Bridges station. Some form of publicity campaign could be undertaken with the rail company to make it clear what passengers can expect, and how they can complain if issues arise.

10 Recommendations

On the basis of the evidence gathered in this Unmet demand survey for Crawley Borough Council, our key conclusion is that there is no evidence of any unmet demand for the services of hackney carriages either patent or latent which is significant at this point in time in the Crawley Borough Council licensing area. The committee therefore has a sufficient database of evidence to support retention of the limit on vehicle numbers, and defense of this if required. There is also no evidence of any need for increasing the level of vehicles at this time.

The issue of poor service to those needing to travel in wheel chairs at Three Bridges station needs action to ensure the service is always consistently provided and excellent.

Appendix 1 – Detailed licensed industry statistics

	hcv	phv	lv total	hcd	phd	dd	total d		Operators	% hcv WAV	% phv WAV
1994D	73			116				**1994D**			
1997D	73	600	673	105	800		905	**1997D**		10	
1999D	73	660	733	130	*700*		830	**1999D**	14	10	
2001D	79	660	739	120	*700*		820	**2001D**	16	19	
2004D	79	660	739	120	*700*		820	**2004D**	16	18	
2005D	79	660	739	120	*700*		820	**2005D**	16	33	
2007D	79	660	739	120	*700*		820	**2007D**	16	33	
2009D	104	569	673	137	620		757	**2009D**	21	30	
2010N	108	564	672	*139*	*625*		*764*	**2010N**	*22*	33	
2011D	122	555	677	140	630		770	**2011D**	23	43	
2012N	124	575	699	*152*	*646*		797	**2012C**	*24*	42	
2013D	122	536	658	163	661		824	**2013D**	24	39	
2014N	124	560	684	*172*	*681*		853	**2014N**	*24*	44	
2015D	123	559	682	180	701		881	**2015D**	24	43	
2016C	123	639	762	193	779		972	**2016C**	33	43	
2017C	123	658	781	201	804		1005	**2017C**	36	43	

Appendix 2 – list of ranks in area

Location	***Road***	***Spaces***	***Operation***	***Notes***
Crawley	The Boulevard	6	24 hr	M+S
	Haslett Avenue West	6	24 hr	Bus Station
	High St, Jubilee Oak	5	24 hr	
	Station Way	6	2200-0300	Club
	Ifield Road	4	24 hr	
	Queensway	4	24 hr	New introduction
	Station	3	24 hr	Plus 6 marked for Crawley Cars
Three Bridges	Station	App 15	24 hr	

Appendix 3 – hours in rank observation sample

Please see separate document

Appendix 4 – detailed rank observation results

Please see separate document

Appendix 5 – on street interview results

Please see separate document

Appendix 6 List of Consultees and responses

Consultation group	Consultee	Response
Supermarkets		
Asda	Pegler Way	Number unobtainable
Sainsbury's	Crawley Avenue	Y
Morrison's	Pegler Way	Y
Tesco	Hazelwick Avenue	N
Lidl	Hazelwick Avenue	N
Hotels		
Premier Inn	Gatwick Crawley Town	N
Ramada	Crawley	Y
Holiday Inn Express	Gatwick Crawley	Y
Arora Hotel		N
Crown Plaza Hotel		Y
The Grange Hotel		N
Restaurants / Café		
Turtle Bay		Y
Ask Italian		N
La Rusta		Y
Smith and Western		N
The Hillside Inn		N
Entertainment		
The Hawth		Y
Hollywood Bowl		N
Ram Sports and Social Club		N
Public Houses		
Jubilee Oak		Y
Old Punch Bowl		N
Black Swan		Y
White Hart		Y
Healthy Farm		Y
Goffs Manor		Y
Night clubs		
Moka		Y
Sis Degrees		N
Bar 7		Y
Anjelique Bar		N
Other council representatives		
Crawley Council	Town Centre Manager	Y