APPENDIX A

Stevenage

Unmet demand survey

September 2023

Executive Summary

This unmet demand survey has been undertaken on behalf of Stevenage Borough Council following the guidance of the April 2010 DfT Best Practice Guidance document, and all relevant case history in regard to unmet demand. This executive summary provides the key facts needed for councillors to determine their current view of the present policy limiting hackney carriage vehicle numbers in the Stevenage licensing authority area. It should not be relied upon without adequate reference to the full document from which it has been summarised.

The limit on hackney carriage vehicle numbers has been in place for a significant period, and at least since 1994. Regular independent reviews are undertaken of this policy, as well as high level internal council consideration of this policy. This report is the latest external independent review of the hackney carriage industry which ran October 2022 to January 2023 and was undertaken by Licensed Vehicle Surveys and Assessment, a joint trading name of CTS Traffic and Transportation Ltd and Vector Transport Consultancy.

Although the headline of a 44% reduction in passenger numbers since 2017 is a negative outcome from the survey, as is the loss of both the central and a key night time rank provision, many other positive points are identified. Hackney carriage vehicle numbers have been retained against a large drop in private hire fleet numbers, whilst the mixed vehicle fleet company has seen gains in share of quoted usage, both potentially public benefits of retention of the limit on vehicle numbers.

Despite a decline in rail passengers of 30% and of rank passengers from the station of 36%, 10% of all rail passengers still leave the station in hackney carriages from the rank. This is a good reduction in need for parking spaces as well as being a better use of motor vehicles than single use to and from the station. It appears, however, that the limit on vehicle numbers applied by the supplementary permit outside the jurisdiction of the council, is worsening service to this important group. Further analysis of the present data could be undertaken to clarify further if the additional restriction is the key factor or if something else is feeding this poorer service level at the station rank.

There is no evidence of any unmet demand in the Stevenage licensing area that is significant at this time which would require additional plate issue. However, there is significant need for the local authority, licensing and planners, to work with the County to identify location for a public town centre rank that could be developed.

Further recommendations are outlined within the body of the main report below.

LVSA

Contents

1 General introduction and background

Licensed Vehicle Surveys and Assessment (LVSA) is a joint venture between CTS Traffic and Transportation Ltd (CTS) and Vector Transport Consultancy. These two companies have hitherto been the two leading practitioners of hackney carriage unmet demand surveys in recent years and who joined forces in early 2017. The combined experience of this joint venture covers in the order of 250 similar studies undertaken since 1999. The contracting company for this survey, CTS, also undertook previous tests of the validity of the limit and its level in 2017, 2014, 2005/6 and 2002 by formal independent surveys and in 2008 and 2011 by higher level reviews of the policy which determined no survey was necessary at those times. The survey due in 2020 was delayed by the COVID pandemic which took hold in March of that year.

Stevenage 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. This is the only part of licensing where such a stipulation occurs and 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. DfT sources do not state when the limit began, but it was in place at the start of formal data collection by the DfT in 1994.

Best Practice Guidance

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".

Several sections of the BPG were revised by the introduction of the "Statutory Taxi and Private Hire Vehicle Standards" (STPHVS) document on 23rd July 2020 (see further detail below). None of these resulted in any material change to the elements regarding unmet demand and its review. At the end of March 2022, consultation began on a fully revised version of the BPG, with responses due back by 20th June 2022 but no final date for acceptance of the revised document. An initial review suggested again no material change in the elements regarding unmet demand and its review.

Legal Background

Current hackney carriage, private hire and operator licensing is undertaken within the legal frameworks set by the Town Police Clauses 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.

Public Experience

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.

Legislative Developments

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 five most recent reviews were by the Office of Fair Trading in 2003, through the production of the Best Practice Guidance in 2010 (BPG 2010), the Law Commission review which published its results in 2014, the All-Party Parliamentary Task and Finish Group which reported in September 2018, the Government Response in February 2019 leading to a part revision of BPG 2010, and the 2022 consultation on a more comprehensive BPG 2010 review (BG 22). None of these resulted in any material change to the legislation involved in licensing.

Legislative Additions

There have been some actual changes to legislation (not guidance) put in place over recent years.

The Deregulation Act 2015 had two clauses relevant to taxi licensing – relating to length of period covered by licences (Section 10) and allowance of operators to transfer work across borders (Section 11) (both enacted October 2015).

In November 2016, the Department of Transport (DfT) undertook its consultation regarding enacting Sections 165 and 167 of the Equality Act 2010. These allowed for all vehicles capable of carrying a wheel chair being placed on a list by the Council (Section 167) leading to any driver that uses a vehicle on this list having 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 so chooses to travel in a seat to make provision for proper and safe carriage of the wheel chair
- To take such steps as are necessary to ensure the passenger is carried in safety and reasonable comfort
- To give the passenger such mobility assistance as is reasonably required

Since enactment in April 2017 issues with discrimination have not reduced as much as expected and further change occurred with one of two 2022 Acts put in place (see below).

The two 2022 Acts make small but significant changes. The 2022 Acts are the "Taxis and Private Hire Vehicles (Safeguarding and Road Safety Act) (31 March 2022)" and the "Taxis and Private Hire Vehicles (Disabled Persons) (28 June 2022)".

The first makes it mandatory for any licensing authority in England that has information about a taxi (hackney carriage) or private hire vehicle (phv) driver licensed by another authority that is relevant to safeguarding or road safety concerns in its area to share that information with the authority that issued that drivers licence.

The second amends the Equality Act 2010 to place duties on taxi and phv drivers and operators such that any disabled person has specific rights and protections to be transported and receive assistance when using a taxi or phv without being charged extra for doing so.

Regard has also been had to the Statutory Taxi and Private Standards July 2020 which were published on 21 July 2020 and represented a milestone in transportation regulation, because for the first time the safeguarding of children and vulnerable people were put right at the heart of the taxi licensing system. This publication also noted that a more complete review of all sections of the 2010 Best Practice Guidance would occur in due course and consultation on a draft of this new document ran from March to June 2022.

At the time of writing of this report, no date had still been given for formal publication of the new DfT Best Practice Guidance following the close of the consultation period.

Recent Research and Reviews

With respect to the principal subject of this survey, local authorities retain the right to restrict the number of hackney carriage vehicle licenses. The Law Commission conclusion (Law Commission, Taxi and Private Hire Services, Law Com No 347, May 2014, ref CM8864) 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. In the end, no comprehensive legislative review occurred and the focus is now on the expected updated BPG22.

During the pandemic, the DfT formally advised authorities to delay unmet demand reviews beyond this three-year interval as they advised any review in the midst of the pandemic was not sufficiently typical to be of value. Most authorities accepted this advice and in particular this survey was delayed till Autumn 2022 when it was felt operations were closer to normal than they had been for some significant while. Our current experience of several surveys is that there is change arising from the pandemic affecting most licensed vehicle operations but that the overall operations are now effectively back to normal.

Alternatives to limiting vehicle numbers

A more recent restriction, often applied to areas where there is no 'quantity' control felt to exist per-se, is that of 'quality control'. This is often a pseudonym for a restriction that any new hackney carriage vehicle licence must be for a wheel chair accessible vehicle, of various kinds as determined locally. In many places this implies a restricted number of saloon style hackney carriage licences are available, which often are given 'grandfather' rights to remain as saloon style.

Within this quality restriction, there are various levels of strength of the types of vehicles allowed. The tightest restriction, now only retained by a few authorities only allows 'London' style wheel chair accessible vehicles, restricted to those with a 25-foot turning circle, and at the present time principally the LTI Tx, the Mercedes Vito special edition with steerable rear axle, and the Metrocab (no longer produced).

Others allow a wider range of van style conversions in their wheel chair accessible fleet, whilst some go as far as also allowing rear-loading conversions. Given the additional price of these vehicles, this often implies a restriction on entry to the hackney carriage trade.

Some authorities do not allow vehicles which appear to be hackney carriage, i.e. mainly the London style vehicles, to be within the private hire fleet, whilst others do allow wheel chair vehicles. The most usual method of distinguishing between hackney carriages and private hire is a 'Taxi' roof sign on the vehicle, although again some areas do allow roof signs on private hire as long as they do not say 'Taxi', some turn those signs at right angles, whilst others apply liveries, mainly to hackney carriage fleets, but sometimes also to private hire fleets.

More recent considerations have added how greater and speedier introduction of more sustainable vehicle propulsion might be encouraged in the licensed vehicle fleets. Air quality zones have also had significant impacts, and in many areas more recently agglomeration of councils has modified overall policies towards licensed vehicles.

Further, the plans to introduce Section 161, and the determination of a proportion of WAV that any fleet must have by the Secretary of State (a quota), are a long way from even any consultation being undertaken. This issue was considered by the Law Commission but they stated 'we did not consider quotas of wheel chair accessible vehicles to be a suitable issue for treatment within a national licensing framework' (Law Commission Final Report para 12.60), nonetheless they reiterated that any such quotas should be decided by individual licensing authorities in response to local needs. They also quoted DPTAC suggestion the quota should be over 30% and that the Joint Committee on Mobility for Disabled People had suggested a minimum of 50% (Law Commission Final Report para 12.61). The often quoted 35% quota was from an earlier European Research document.

The Index of Significant Unmet Demand (ISUD) Tool

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. This is mainly due to some court cases in Scotland taking interpretation of the duty of the licensing authority further than is usual in England and Wales, requiring current knowledge of the status of unmet demand at all times, rather than just at the snap-shot taken every three years. However, the three-year survey horizon has become generally accepted given the advice of the BPG and most locations that review regularly do within that timescale.

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".

Unmet Demand Case History

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).

2019 saw three challenges with respect to surveys of unmet demand. All three found in favour of the current methodology being undertaken. A key focus was the need for a robust and up to date independent survey report being available.

In one case it was made clear the current guidance is based on the 2010 BPG, which supercedes previous notes and DfT advice, whilst in another case having a valid survey meant those challenging had no case for their proposed challenge, and in the final case an authority was clearly told they could not rely on a very old survey which itself could not be produced. In the end a fresh survey was undertaken, finding no unmet demand, but undertaken on the established standards only.

In general, industry standards suggest (but specifically do not mandate in any way) that the determination of conclusions about significance of unmet demand should 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, although apart from the general guidance of the BPG there is no clear stipulations as to what this means in reality, and certainly no mandatory nor significant court guidance in this regard.

The 2010 Best Practice Guidance stated "Most local licensing authorities do not impose quantity restrictions; the Department regards that as best practice." This is restated in the currently draft new Best Practice Guidance.

This new draft Best Practice Guidance also adds para 9.3 quoting "The Competition and Markets Authority was clear in its 2017 guidance "Regulation of taxis and private hire vehicles: understanding the impact of competition" that "Quantity restrictions are not necessary to ensure the safety of passengers, or to ensure that fares are reasonable."

To summarise, the Department for Transport Best Practice Guidance only references 'quantity restrictions' and that not imposing them is regarded by the Department as 'best practice'.

At the current time (June 2023), based on the March 2022 DfT statistics and our current knowledge from other studies and discussions, around 25% of the licensing authorities in England retain a limit on the number of hackney carriage vehicle licences in a strict numerical manner consistent with Section 16 of the 1985 Act. A small number only restrict numbers within one part of their area. Several recent unitary authorities have been the main reason for a number of reductions in limit policies although the most notable removal of limits in the last year has been Cornwall removing limits from its three regulated zones, whilst still at present retaining six zones overall.

Cross Border and Sub Contracting Implications

Recent legislation needing clarification has some operators believing they can use vehicles from any authority as long as they are legally licensed as private hire. At first, under the 'Stockton' case, this was hackney carriages operating as private hire in other areas (cross-border hiring). More recently, under the Deregulation Act, private hire companies are able to subcontract bookings to other companies in other areas if they are unable to fulfil their booking, but the interpretation of this has become quite wide.

The 'triple lock' licensing rule has also become accepted. A vehicle, driver and operator must all be under the same licensing authority to provide full protection to the passenger. However, it is also accepted that a customer can call any private hire company anywhere to provide their transport although many would not realise that if there was an issue it would be hard for a local authority to follow this up unless the triple lock was in place by the vehicle used and was for the area the customer contacted licensing.

Further, introduction of recent methods of obtaining vehicles, principally using 'apps' on mobile phones have also led to confusion as to how 'apps' usage sits with present legislation.

All these matters can impact on hackney carriage services, their usage, and therefore on unmet demand and its significance.

During September 2018 the All-Party Parliamentary Group on taxis produced its long-awaited Final Report. There was a generally accepted call for revision to taxi licensing legislation and practice, including encouragement for local authorities to move towards some of the practical suggestions made within the Report. The Government has broadly supported the recommendations of this Task and Finish Group.

Despite some opposition from members of the group, the right to retain limits on hackney carriage vehicle numbers was supported, with many also supporting adding a tool which would allow private hire numbers to be limited where appropriate, given reasonable explanation of the expected public interest gains. This latter option is now being taken forward in Scotland, with two studies published and the Scottish Government preparing guidance, although the Government response did not support this option.

As already stated, other groups have provided comments giving their views about licensing matters but the upshot remains no change in legislation from that already stated above. The Scottish Government are moving forward in terms of their application of the potential limiting of private hire vehicle numbers but this is specific to Scottish law and not presently relevant to the English licensing authorities.

The “Protecting Users Statutory Guidance” (now the “Statutory Taxi and Private Hire Vehicle Standards” (STPHVS) was issued in July 2020 for application and advice of such application to DfT by the end of January 2021. Whilst again the taking forward of the wider BPG review is mentioned in terms of a further consultation, exact times for this nor the likely implementation date for this are not given. The April 2010 BPG therefore remains valid for our review.

For completeness, STPHVS seems to require by the end of January 2021 (subject to the continued impact on time resources of the COVID-19 pandemic) the following:

- Making publicly available a cohesive taxi licensing policy document
- Clearly documented ways the licensing authority will share information between relevant stakeholders
- Provision of a robust system for recording complaints that is clearly made known to passengers
- Sufficient training for those making decisions about licence issue
- Clear assessment of option of mandating CCTV in vehicles
- Specific requirements for private hire company records

Coronavirus

The serious Covid-19 virus took hold in the UK during March 2020. Whilst life carried on almost as normal until mid-March of the same year, formal lockdown was applied from Tuesday 24th March 2020 until 24th February 2022 when final restrictions were removed. Significant reductions in movement had begun to bite from the previous week. The last dates in 2020 when on-street and rank surveys occurred in other areas were effectively Sunday 16th March 2020. Up to that point regular review on the three-year timetable had begun to be much more widely accepted.

The licensed vehicle trade was one of a few industries permitted to continue to operate throughout the pandemic and various lockdowns, albeit in a range of different ways due to reduced demand.

The lockdown began to be eased on 13th May 2020 in some sectors, with people encouraged to return to work if they were not able to work from home. Restrictions on outdoor exercise, golf courses, tennis courses and socialising at distance, with restart of construction also allowed. From 15th June 2020, bars, restaurants and hairdressers were allowed to return to a ‘new normal’. The next wave of easement occurred on 4th July 2020.

However, a range of different re-restrictions were applied in various locations as cases began to rise again. Schools were re-opened in September, but a new 'rule of six' was introduced shortly after reducing the ability of people to socialise as rates of infection rose again, together with a 22:00 hours close time for all hospitality venues. In general, new restrictions tended to be introduced with a few days lead in but this ended with a new lockdown from Thursday 5th November2020 ending on Wednesday 2nd December 2020 that year.

After that, new Tiers were introduced (to try to minimise restrictions in parts of the country where the virus was less dominant) and then again another national lockdown was applied from early January 2021 but with the start of vaccinations providing some hope of an eventual overcoming of the impacts of the virus.

As levels of vaccination increased and infection / hospitalisations and deaths reduced, a new road out of lockdown was announced and implemented. The final stage, removal of most English restrictions, was delayed about a month but was finally instigated towards the end of July 2021. The Government focus has since then been on 'coping with the virus' although as Winter 2021 progressed infection levels tended to move upwards.

Later in Winter 2021 appearance of a new variant led to further concern and encouragement to partake in a booster vaccination programme as well as taking further care about interaction. Mask wearing was returned to being a legal requirement at the start of December 2021 in many, but not all of the previous circumstances. The situation around Christmas 2021 was very tense. Working from home was reinstated towards the end of 2021.

Early 2022 saw more confidence that the 'omicron wave' could be survived although in early January 2022 there was pressure on many industries arising from staff isolating. Various methods were being considered to minimise the impact of need to self-isolate. On 24th February 2022 all legal restrictions in England were removed with the focus clearly moving to 'living with the virus' although unintended consequences of rising fuel and other prices from the reopening of the economy were also exacerbated by the current issue of the Ukraine occupation.

During Autumn 2022 there was a high level of COVID infection but the link between infection and serious illness appeared to have been broken, although the need to keep levels of immunity to severe disease may well lead to further immunisation as time proceeds. Another booster injection was starting to be rolled out as part of the vaccination strategy.

Overall, the pandemic led to a significant period of lack of business for both hackney carriage and private hire vehicles, in various ways as the pandemic developed. Some of the impacts of this are discussed in public and driver attitude chapters below, as well as review of impact on demand in the rank chapter. More significant was the reappraisal of many as to their involvement with the taxi industry, and the general job market churn that was instigated not just in the taxi arena. In many areas there is clear knowledge that many who planned to retire brought that date forward whilst others found that the certainty of income from delivery driving was preferable to the vagaries of taxi passenger demand.

Various contract work appears to have remained a constant during the pandemic however (school transport, health transport and so on). However, airports were particularly badly hit resulting in many private hire vehicles being unusable, whilst rail patronage remains reduced with patterns of travel strongly revised towards off-peak travel.

Yet others found the shortage of private hire drivers meant more requirement on hackney carriages in the daytime, in turn meaning they could earn more in the week, and not be reliant on servicing less-preferable customers in the early hours of Saturday and Sunday morning.

A further issue we have observed is that even pubs, restaurants and night venues are now reducing their opening hours or days in reaction to rising costs and staff shortages. This can lead to taxi demand in an area becoming peaky or peakier with such change. This means spikes in passenger demand for licensed vehicles, which is always harder to meet in a timely manner for a given level of vehicles particularly in the later and night-time economy hours?

Further, the impacts of the developing war in Ukraine and other economic changes partly arising from Brexit is again putting pressure on costs of providing licensed vehicle services. Rising fuel prices have also added to the issues, albeit counter-balanced with an increase in fare charges for some authorities. A further knock-on has been change to how those involved in the trade interact with their licensing authorities, with most face-to-face contact effectively removed.

The days when the main aim of a demand survey was checking if passenger demand had changed to see if supply remained sufficient have now been replaced by a much wider research need to identify both demand and supply side changes (such as drivers working shorter weeks, more time by drivers undertaking contracts or diversifying as delivery drivers changed passenger use of ranks and locations arising from matters such as reduced rail travel, etc).

Even long-standing areas with limited hackney carriage vehicle numbers have been impacted by having spare hackney carriage vehicle licences available for the first time in decades. However, our experience suggests that even spare plates and reduced demand can still result in unmet demand increasing as a result of change in the range of elements that need to balance to provide better public service.

Conclusions to this Chapter

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. Further, the jurisdiction focusses on the vehicles, drivers and operators but rarely extends to the physical infrastructure these use (principally ranks).

The vehicles 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 generally considered to be insured for their journey.

2 Local background and context

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

- appointed LVSA – a joint trading name of CTS Traffic and Transportation and Vector Transport Consultancy on 12th October 2022
- in accordance with our proposal of September 2022
- as confirmed during the inception meeting for the survey held on 5th October 2022 (by phone)
- this survey was carried out between October 2022 and January 2023
- On street pedestrian survey work occurred in November and early December 2022 (on Tuesday, Wednesday and Thursday)
- the video rank observations occurred at from 10th to 13th November 2022
- Licensed vehicle driver opinions and operating practices were canvassed by an all-driver survey through January and February 2022
- Key stakeholders were consulted throughout the period of the survey
- A draft of this Final Report was reviewed by the client
- Delays to reporting arose purely from time constraints for both client and consultant and not for any other reason related to the study
- and reported to the appropriate Council committee.

Stevenage Borough Council is one of ten districts within the County of Hertfordshire. The authority has a current population of 89,500 (2021) using the 2021 estimates currently available from the 2011 census. This is a marginal increase since the last survey. It was the first new town, set up in 1946.

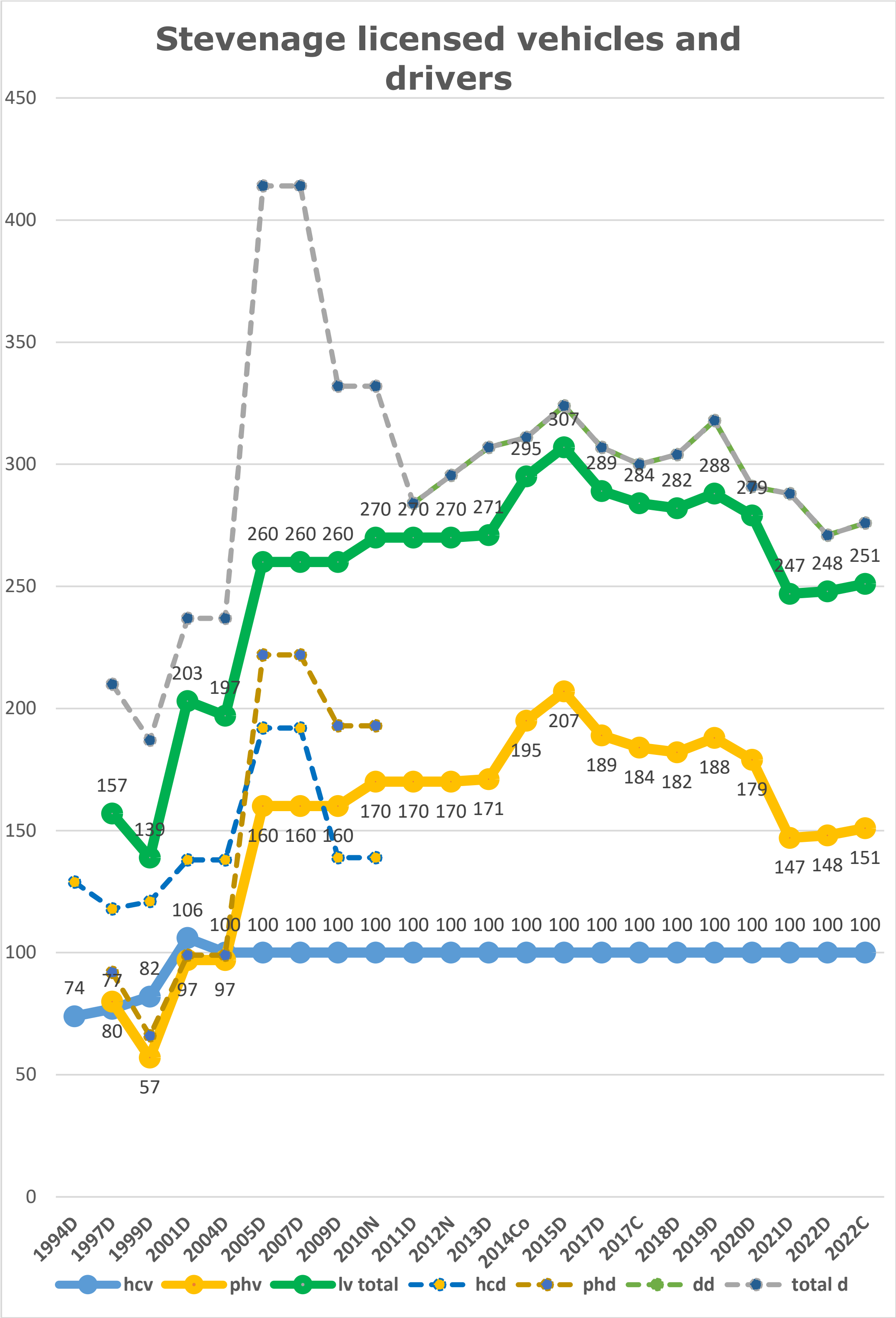
In terms of background council policy, Stevenage Borough Council sees its transport policy set by the higher tier County authority. Highway powers are also held by Hertfordshire but Stevenage itself retains direct highway powers for the central Stevenage roads.

The current focus by Hertfordshire County Council is development of a long-term transport planning framework, known at the Hertfordshire 2050 Transport Vision. This is based on an evidence-gathering stage, completed in 2015, followed by broad options which are currently being developed through engagement with stakeholders. These will be taken forward in short to medium term packages and long-term concept scenarios to keep these in context. The focus is on forward planning of major schemes where needed, but supported by complementary initiatives that help harness the full benefit of the larger schemes.

Stevenage produced a document "Future Town, Future Transport" in 2019 to take forward the County Local Transport Plan 4 in the local setting. It has four themes, connectivity, liveable streets, active and healthy travel and green travel.

The current framework joint working between County and District is provided by LTP4 and the North Central Hertfordshire Growth and Transport Plan. Implementation will occur using the Short Term Action Plan 2019-2022 (including relocation of the bus station to improve interchange with rail services, which had a significant impact on the central Stevenage taxi rank). Both the Stevenage Borough Local Plan and Hertfordshire LTP 4 plan to 2031 feed the medium-term action plan. There are no specific mentions of licensed vehicles in these plans, as is typical despite DfT encouragement in the BPG that taxis should be included in transport policy documents, although this is principally an issue for the higher County authority.

However, all licensing authorities have full powers over licensing the vehicles, drivers and operators serving people within their area. Stevenage Borough Council has chosen to utilize its power to limit hackney carriage vehicle numbers, and as far as we are aware has done so since statistics were formally recorded in 1994. 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.



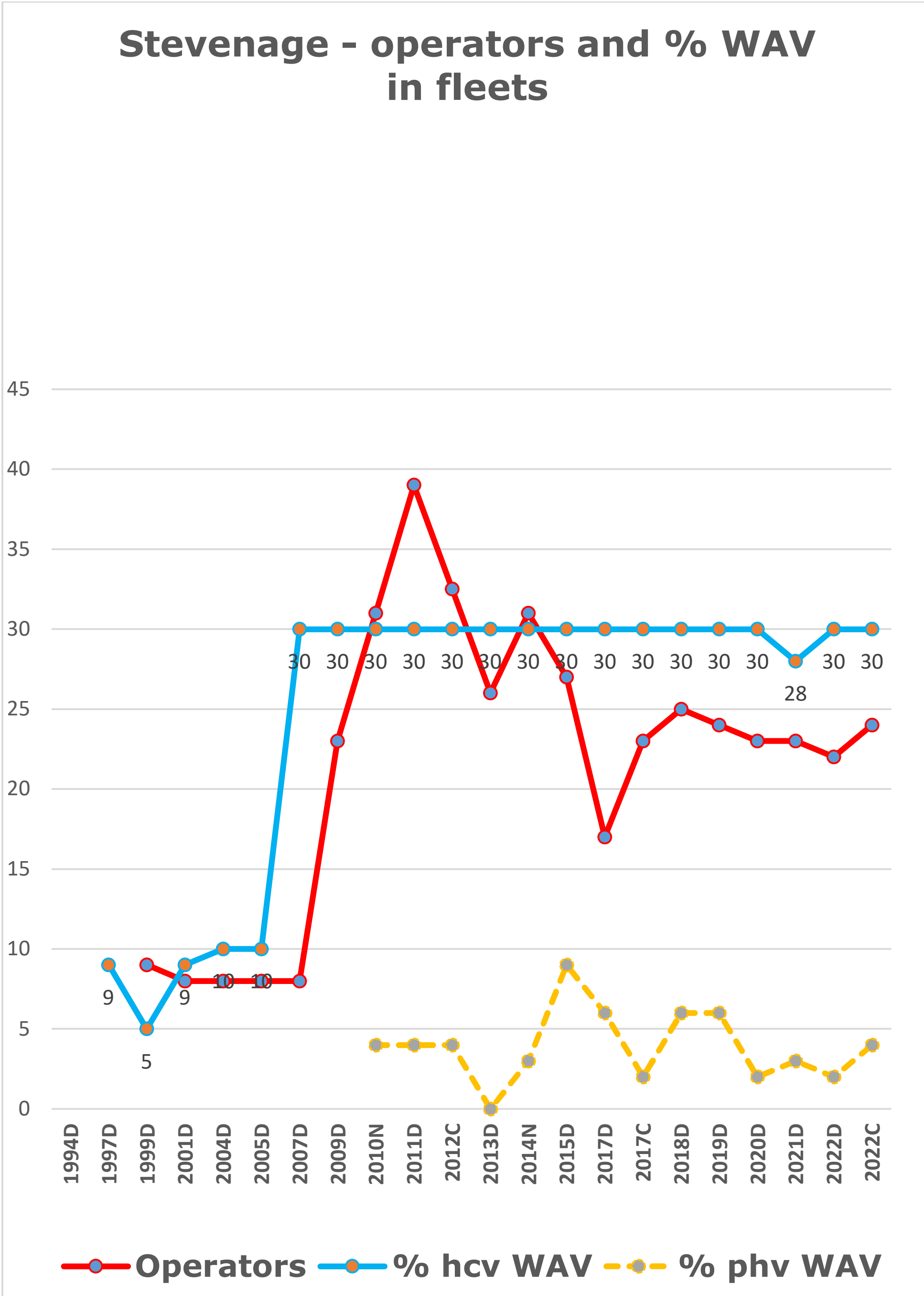
Key – 1994D: DfT Stats 1994 (etc); 2012 N National Private Hire Association Statistics; 2022C (etc) – Council statistics for dates given; coloured lines as defined at bottom of diagram, LV=total licensed vehicles, hackney carriage (hcv) plus private hire (phv). DD = total dual drivers (total d, total drivers, sum of hackney carriage (hcd), private hire (phd) and dd.

Licensing Statistics from 1994 to date

The graph shows a general decline in private hire vehicle numbers from a peak in 2015 when they were more than twice the number of hackney carriages. There was a slight resurgence in 2019 but then decline returned which was increased strongly by the pandemic. The low point saw the private hire fleet down to 147, no more than 1.5 times the level of hackney carriages although there has been some return since then but only in very small numbers, with the fleet at 151 about the time of the survey in 2022.

Since 2009 dual driver numbers have approximately followed the total number of vehicles, with very little recent evidence of any sharing of vehicles. The transfer to dual driver licensing is also notable although this was now some while ago. The decline in drivers was not as sharp during the pandemic as that for vehicles although its minimum level was a year later than the dip of vehicle numbers. There has been some growth back since March 2022 to the time of the survey but again only marginal.

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.



Key – 1994D: DfT Stats 1994 (etc); 2012 N National Private Hire Association Statistics; 2022C (etc) – Council statistics for dates given; coloured lines as defined at bottom of diagram.WAV = wheel chair accessible vehicles from DfT survey (not necessarily s167 values).

Operator numbers and levels of WAV provision in the fleet

The graph above shows a very stable level of WAV in the hackney carriage fleet although there is a slight dip very recently which may have been an impact of the pandemic, although this was not significant. On the private hire side there was a major drop just in advance of the pandemic although more have returned to private hire just in advance of the survey.

Operator numbers have been generally declining although again the most recent information around the time of the survey suggests a small increase there as well.

Overall, all figures seem to suggest that the time of the survey was one when the industry had begun to return to more normal levels of demand with vehicles and drivers all seeing marginal resurgence.

National levels of WAV

From the latest March 2022 DfT statistics, the average WAV level over all English licensing authorities, excluding London was 40%. When the 58 authorities that have 100% WAV fleets are removed, this proportion is 22%. The overall level of phv WAV is 4% overall and 5% for the mixed fleet only authorities. Overall WAV levels are 13% in total and 11% for the mixed fleet only authorities. At the time of that survey, Stevenage saw 30% hcv WAV, 2% phv WAV and 13% overall WAV putting it generally ahead of most authorities in overall provision and hcv WAV provision. In fact, Stevenage was 56th equal out of the 206 authorities with mixed vehicle fleets in terms of the percentage of hcv WAV.

Limit Reviews

Stevenage Borough Council undertakes regular review of its policy to limit hackney carriage vehicle numbers in line with the BPG. The previous surveys were in 2017, 2013, 2005 and 2002, with intermediate higher-level reviews of the policy which determined that unmet demand detailed reviews were not necessary where the gap was longer than the standard three years. The current review was delayed by DfT guidance suggesting the need to wait until demand was more normal before undertaking fresh surveys after the pandemic. This made the gap to the previous survey in the order of over five years, with 2017 rank data collected in June and the current survey in November 2022. Our experience suggests that the delay was reasonable and that this survey was undertaken at the earliest sensible time following the pandemic.

3 Patent demand measurement (rank surveys)

As already recorded in Chapter 2, control of provision of on-street ranks in Stevenage Borough Council is generally under the control of the higher tier authority, although it has direct powers for central Stevenage roads. Appendix 2 provides a list of ranks in Stevenage 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.

Since the last survey, there have been no changes to rank locations, but the Bus Station has been relocated nearer to the railway station (June 2022) which removes some of the key demand for the only relatively recently introduced rank in Danestrete. It is understood that other changes in due course may return the benefit of a rank in that location but at the time of the survey there was very little footfall around that location. The new bus station has improved access across Lytton Way to the rail station, which could also mean passengers from the station may use buses rather than the hackney carriages.

In the Leisure Park, there has been continual change in operators of venues, with the latest operator claiming to offer a different mix of facilities, which they claim are more akin to the likely client base. This remains serviced by the rank near to McDonalds although this is privately provided and marked by the Leisure Park owners. For this survey in 2022 it was made clear that permission was unlikely to be granted for any survey work of ranks within the Park.

In order to remediate for this loss of information, cameras were installed on the two entry points to the Leisure Park and vehicle types observed entering and leaving over the survey period (for all three evenings). Although a large number of vehicles were observed entering and leaving both exits, the number of observed hackney carriages for the full period was just 33 – suggesting the ranks are now very little used. It is likely that app-based private hire may well have supplanted the hackney carriage offer although this is not certain.

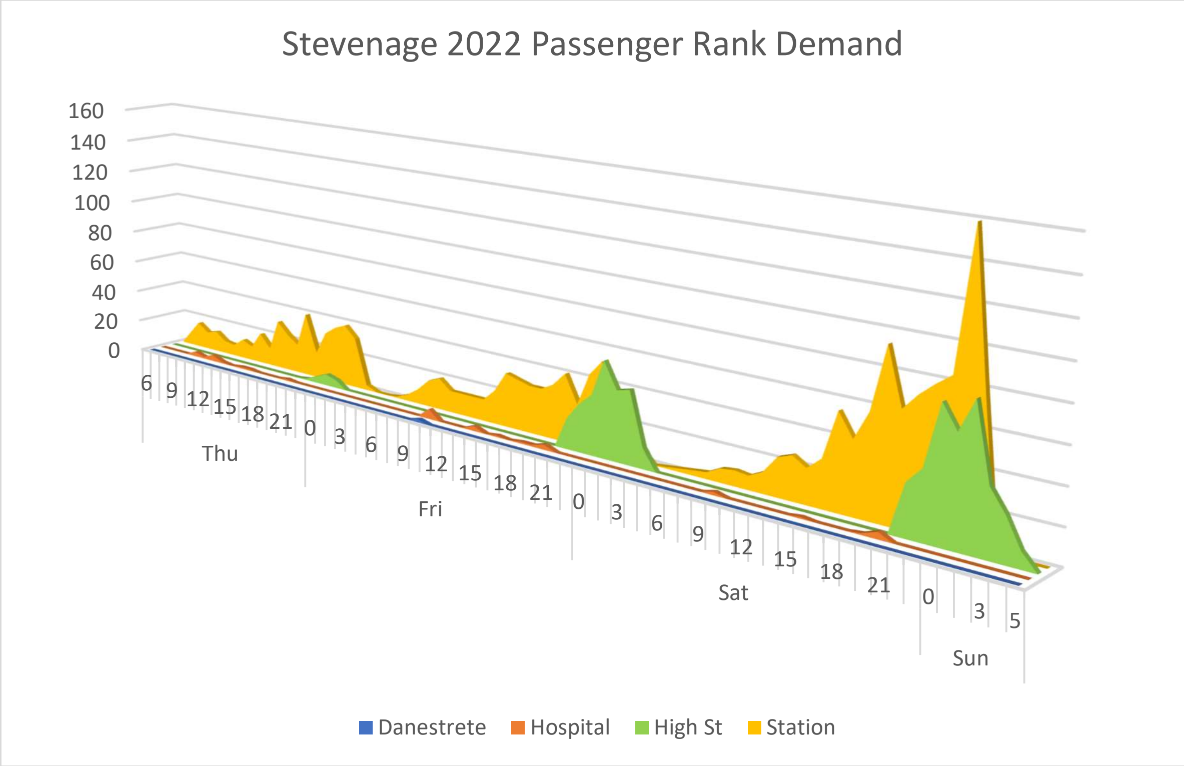
In any event, the rank provision there is private such that even if unmet demand was observed there, there would be very limited actions any Council could take to encourage more vehicles to meet the need if not encouraged by the market.

At all other active ranks, cameras were installed to cover the three day period of the rank observations. Care was taken to mount these as far as possible to avoid detection by those servicing each location, to minimise potential issues from data protection whilst ensuring they were close enough to allow any passenger or vehicle waiting to be adequately monitored. Our current equipment is much smaller yet more powerful than previously which allows much better and more secure / robust monitoring. On their introduction, one licensing officer asked us if we had mounted cameras in the right town, and when their location was explained he said he had thought they were seagulls.

Overall rank usage

The rank observations in early November 2022 were analysed and an overall graph produced covering the actual observations. For this survey, all ranks were observed on the Thursday, Friday and Saturday, although it was found that the Danestrete / Westgate location saw very little usage, only on the Friday. Due to refusals from the private site at the Leisure Park no passenger data is available for that location. However, this is not an issue as already stated as any unmet demand there cannot be easily revised by the Council given its location on private land and any subsidiary requirements applied by the owners.

As noted above, our current camera systems are even less obvious than those previously and are very unlikely to have been observed by anyone whose behaviour might then have been changed. The station rank needed even more care given that it is a private location.



Note – vertical axis is total passengers at each rank in given hour, horizontal is hour of day and day of week.

The graph shows that the area has a peaky demand profile, with relatively little daytime demand but quite high night demand, principally on Saturday night. On the Saturday, both High St and the station are busy late, although High Street as on Friday continues later, although the total peak flow of 219 at all ranks in the Saturday midnight hour is 73% made up from station flows. There is no flow from the station rank after the 01:00 hour in the early hours of Sunday whereas before that flows at that rank were continuous with the only zeroes being 03:00 and 04:00 Friday and 03:00 Saturday mornings.

During daytime the principal demand is at the station, with very small amounts of trade from the hospital and next to nothing now from the Danestrete / Westgate rank. The High Street rank provides good levels of evening demand, but mainly on Friday and Saturday nights although some Thursday demand was observed.

Summary of average rank usage

The individual day observations were then developed into approximate estimates of average weekly usage of ranks, in a similar manner to that undertaken for the previous surveys. The table below compares, with the busiest rank at the top of the table, across the surveys undertaken.

Rank	2022		2017		2014		2005		2002	
	Pass	%	Pass	%	Pass	%	Pass	%	Pass	%
Station	3,384	79	5,248	68.5	4,492	64	4,485	66	2,104	43
High St Nbd	825	19	1,432	18.7	1,442	20	Not intro		Not intro	
Old Stevenage	Replaced		Replaced		Replaced		0	0	Not obs	
Leisure Park	No permission		921	12	810	12	1,533	22	1,442	29
Westgate	See Danestrete		37	0.5	Not intro		Not intro		Not intro	
Swingate	Replaced		Replaced		227	3	832	12	801	16
Lister Hospital	75	1.8	20	0.3	42	1	Not obs		Not obs	
Danestrete	10	0.2	Not obs		25	0.0	23	0.0	606	12
High St Sbd	Replaced		Not obs		Unused		Not intro		Not intro	
Totals	4,294		7,658		7,038		6,873		4,953	
Growth from prev year	-44		+9		+2		+39		n/a	
Growth from 2002	-13		+55		+42		+39		n/a	

The 2022 figures exclude any numbers at the Leisure Park although our evidence suggests there is very little hackney carriage based demand now. The site has some 1,200 free car park spaces but provides no further information about travel other than by car.

The table shows further focus on the rail station rank although the share for High Street remains similar at 19% of the 44% lower overall total. Lister Hospital share has increased, but the main change is no demand from the Leisure Park (which we believe is a true loss from evidence we have). Further, the expected development of usage of the new rank at Danestrete/Westgate has not materialised given the closure of the Bus Station and refocus of town centre demand.

Usage of ranks by those with disabilities

Record was made of any persons using the ranks either in wheel chairs, or who appeared to be disabled by those watching the footage. The survey period saw one person travelling in their wheel chair, at the Hospital rank (none were seen last time), with six (three last time) people who appeared to be disabled accessing hackney carriages at ranks. There was one observation at High Street and five at the station (last time there was one at each of Westgate, High Street and the station ranks). This suggests some increase in usage by those dependent on adapted vehicles.

Across the surveyed rank hours there were 34% of vehicles observed that were WAV style. This was 47% of the total hackney carriage observations. The level of WAV at the High Street rank was much higher – 65%, with the station seeing 43%, hospital 38% and Westgate 18% (of the small number of vehicles there). This suggests the focus is on the higher carrying capacity of the vehicles rather than their WAV ability.

Abuse of ranks

Observations also noted other vehicles at or near the ranks observed. During the course of the survey, there were around 5,300 observations of activity at or near the ranks. Of these, 73% were distinct vehicle movements (single direction).

Of this number, 25% (17% last time) were private cars, the bulk of which were at the Westgate and Lister Hospital ranks, which are within other highway uses and therefore open to abuse. 1% (2% last time) of movements were goods vehicles. Just 1.5% (3% last time) of movements were private hire vehicles. There were a very small number of out of town vehicles and emergency vehicles (six and four respectively in total).

The remaining 72% (78% last time) of observations were of Stevenage hackney carriages, of which 53% (55% last time) were saloon style and 47% (45%) appeared to be WAV style. This is a much higher proportion than in the actual fleet. Further, the focus of WAV style vehicles observed was at the High Street rank that suggests the main use of such vehicles is for their capacity rather than their WAV status (65% of vehicles there were noted as WAV).

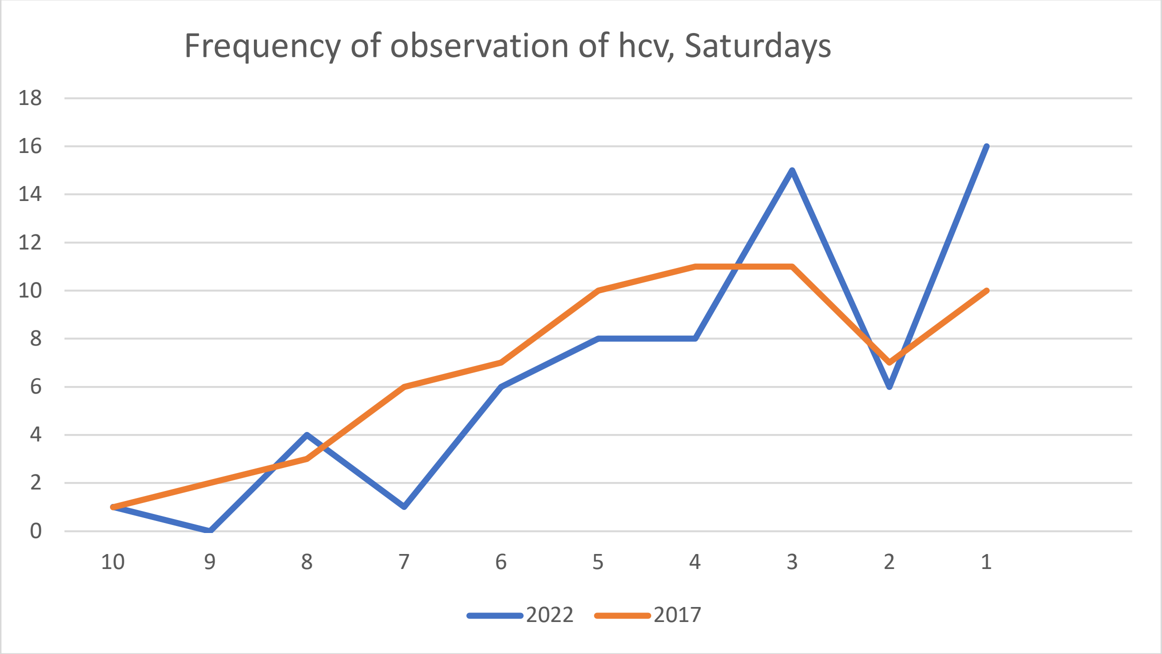
Vehicle activity levels

A test was undertaken on the Friday and Saturday of the survey to identify how many of the hackney carriage fleet were active during those days. Six different 1.5 hour periods were covered at three different locations for appropriate times.

Some 396 vehicle movements were identified, of which 365 were legitimate Stevenage hackney carriages, with the remainder 22 private hire vehicles and nine vehicles that could not be matched to local hackney carriage or private hire plates.

The observed hackney carriages on the Saturday were found to account for 67% of the fleet, the same percentage as in the previous survey. When the Friday data is included the percentage of the fleet seen rises to 72%, not a great increase given a full extra day of observations were added. The actual level of vehicles seen on the Friday alone was 58%.

Compared to 2017, overall vehicle frequencies in terms of how many times specific vehicles were seen were very similar. The most frequent vehicle was seen ten times, with the highest number of vehicles seen once (16 vehicles). The graph below presents the distribution of the frequency of hcv observation for the Saturday observations in both 2017 and 2022. These two distributions are very similar:



Note: vertical axis is total number of plates seen at the frequency shown in the horizontal axis.

Considering the two days of plate observations, Saturdays tend to see more vehicles active in the later periods at High Street, but the same level at the station. The highest proportion of vehicles seen, some 31% of the fleet, was in the two periods from 22:00 onwards at Stevenage station on both Friday and Saturday. The number of vehicles active at High Street doubles from the earlier period to the later period (10% to 22% Friday and 10% to 24% Saturday).

Comparing the two Saturday data sets from 2017 and 2022, the earlier High Street period saw 7% of plates in 2017 but 10% in 2022, but for the later period the values are opposite, being 36% in 2017 but only 24% now. A similar pattern applies to comparison of the first two Saturday station periods although the latter period is only marginally reduced from 32% in 2017 to 31% now. The earlier period rises from 23% in 2017 to 28% now. This suggests an element of the national pattern of reduced levels of vehicles tending to work late night Saturdays now compared to 2017 is also occurring here.

Overall, this suggests there is spare capacity in the fleet based on the demand and supply levels identified but that as in most other surveys undertaken, vehicles are focussing more now away from late night Saturday work. As already noted, this is a national trend whereby those in the trade are choosing to prioritise working at times preferred and away from times when customers might be more difficult to service.

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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 this survey, 200 interviews were undertaken on a Tuesday, Wednesday and Thursday in late November / early December in the main part of the current Stevenage town centre. No other options were taken for sharing the questionnaire more widely.

The gender and age structure of the interviews was compared to the latest 2021 census values. Our survey interviewed about 4% more males than the census suggests (last time was only slightly biased to men). Both the lower and mid-age groups were underrepresented compared to the census (by 10% and 8% respectively) with the older group 17% over-represented. The mid age group had been overrepresented last time.

88% (71% last time) lived in the area (similar across both locations). Main other postcodes were LU1 and MK40, both relatively nearby.

For this survey, 73% in total said they had used licensed vehicles in the last three months (much higher than the 27% of last time). Of the total responses, 25% said they had used hackney carriage only, 14% private hire only and 34% by both kinds of vehicle. This suggests hackney carriage usage could be up to 59% of all persons interviewed, a very high level (although the level is most likely to be closer to 25%).

People were then asked how often they used licensed vehicles in the area. The results suggested a good average of 2.3 (was 1.4 last time) trips per person per month. The highest proportion, 41% said once or twice a month, followed by 16% once or twice a week with just 5% saying 'never'. Just a handful of interviewees did not respond.

When the same question was asked, but specifically about hackney carriages, the values dropped to 1.4 (0.2 last time) trips per person per month. This suggests 62% of use of licensed vehicles would be by hackney carriage – very similar to the result from the recent usage estimate of 59%. For hackney carriages, 34% said they made trips once or twice a month with 14% once or twice a year next highest.

People were asked how they normally got a licensed vehicle within Stevenage. 43% said they phoned, 32% said at a rank, 17% hailed and 8% used an app. There was no quoted use of Freephones or any other methods. Again, these values are in the same direction as the quoted usage of 59-62% (49% for normal methods).

People were then invited to tell us which companies they used to obtain vehicles. Just nine (seven last time) names were provided. 77% (17% last time) of those interviewed gave at least one response. 10% named three companies and 45% each named two or one.

There were four companies named with 15% or more of the total share, accounting for 93% of all mentions. The top company gained 33%, then 26%, then 19% and finally 15%. The third most popular was a national app-based company.

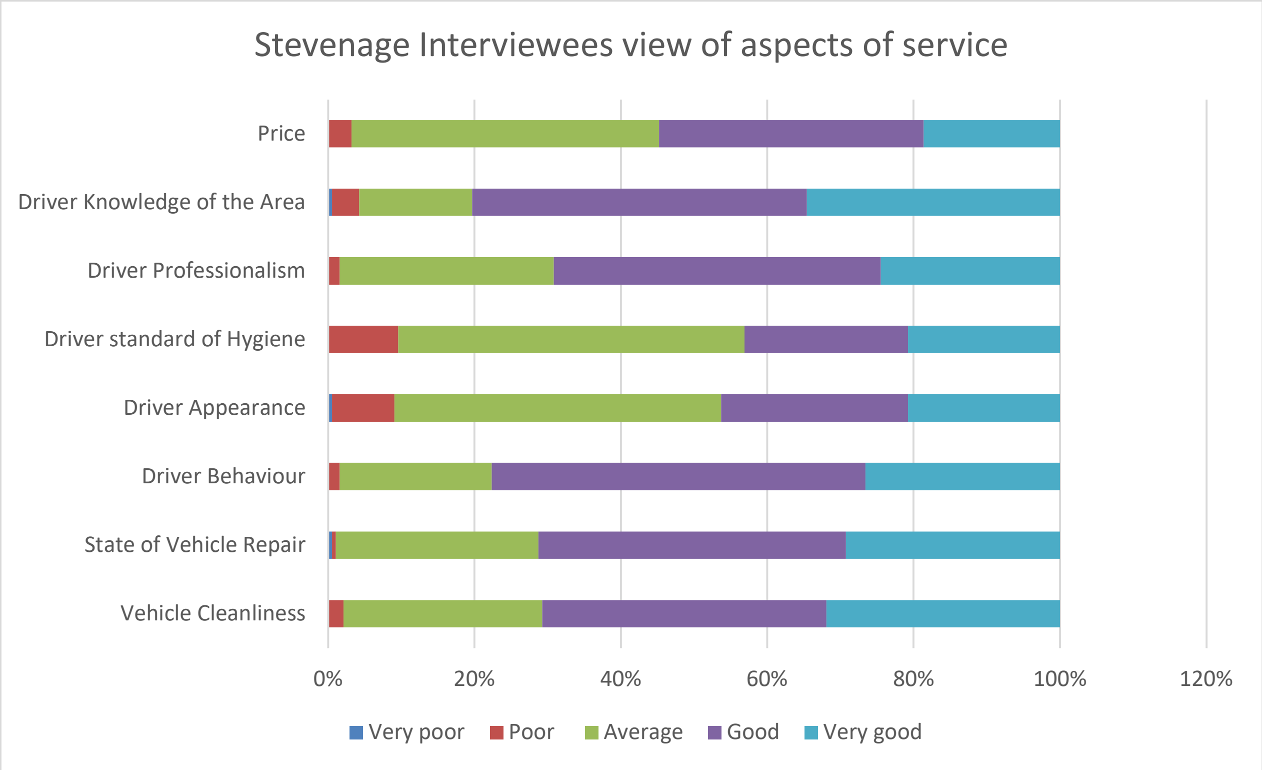
Compared to the previous survey, the top company has reduced share from 39% last time, the current second company has increased share from 10% and moved from fourth (this is the main mixed fleet private hire company in the area), the national app has moved up from fifth to third and from 6% to 19% and the fourth company has lost share from 24% previously. Another company has lost share from 16% previously to 1.6% now. Another company has lost share from 2% previously to 0.4% now (a single person naming them now)(although this is not a licensed Stevenage private hire operator). Two different companies were named this time but only received 1.2% and 1.6% respectively. The final company named last time, with 2% of mentions, which was not a local company, was not mentioned this time.

This does suggest significant change in the nature of private hire operations in this area, whilst putting the mixed fleet (hackney carriage and private hire) operator in a good light in terms of their increased share in the market.

When people were asked how often they used a hackney carriage in the Stevenage area, just one (none last time) said they could not remember seeing a hackney carriage, which is an encouraging result. However, 15% (reduced highly from the 28% last time) could not remember when they had last used a hackney carriage, so hackney carriages are in fact used more in the mix.

Compared to the last survey when just 17 people in total told us ranks they were aware of, 138 (69% of interviewees) gave us one or two ranks this time. 14% quoted two ranks and the remainder just one. However, compared to the seven ranks or locations last time, this time only the rail station and Westgate were mentioned, with no mention of High Street or Lister Hospital at all. 82% of mentions were for the station rank (41% last time). 48% of those naming locations said they used the location named. However, all but two of those quoting Westgate said they did not use it.

94% of interviewees provided their views about various aspects of the service provided on their most recent trip in a licensed vehicle (both hackney carriage and private hire). The overall picture is shown in the graph below:



The dominant view for all but three aspects was that current service was good. For the other three aspects, driver appearance, driver standard of hygiene and price, people said they felt average service was provided. However, only three elements scored 'very poor' although all scored some 'poor' scores. The most positive score was for driver knowledge of the area, where 35% said this was very good and 46% good, although it was also one of the 'very poor' scorers (but just 1%).

As is usual, price tended to score less well and had the lowest 'very good' score, but it did not score any 'very poor' either, and its 'poor' share was just 3% of respondents.

As is normal, a higher number of people (although given the good response to the previous question, not much more) (97% responded) provided the matters which might encourage them to use hackney carriages more. For this survey the dominant response (79% of all responses) was if they were more affordable (17% said if cheaper last time). 11% said more hackney carriages they could phone for (33% last time), 6% said more hackney carriages they could hail or get in the street (8% last time) and 2% each better drivers and a screen between driver and passenger.

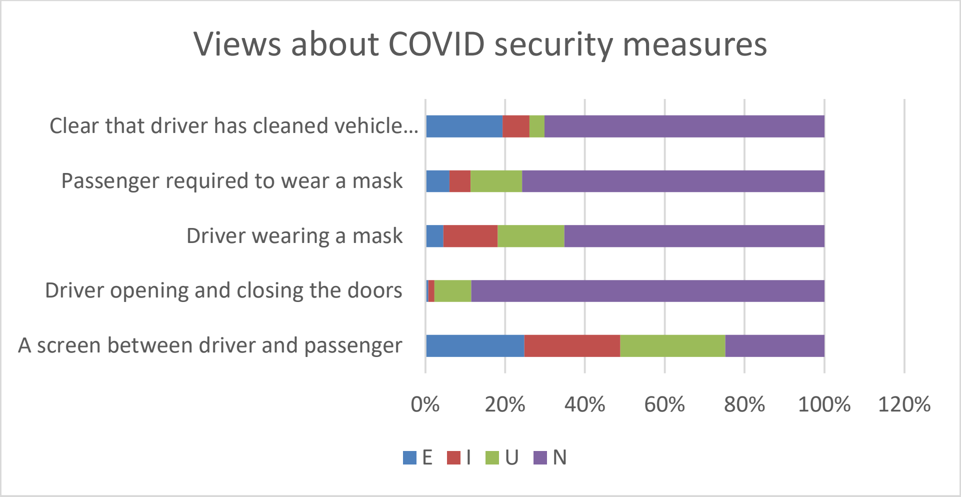
People were asked if they had a disability, or they knew someone who had a disability, that meant they needed an adapted hackney carriage to travel. Compared to the very low response last time, this time most responded. The level of those not needing or not knowing anyone needing adaptation was 69%, suggesting a high level of need for adapted vehicles. All but one person needing an adapted vehicle said either they or someone they knew would need a WAV style vehicle. 20% said they knew someone that needed a WAV and 10% said they needed one.

None (7% last time) said they had ever given up waiting for a hackney carriage anywhere in the Stevenage area. This implies the very low 0.5% latent demand factor in 2017 is this time zero.

59% felt there were enough hackney carriages in the Stevenage area.

With respect to differences in levels of usage pre COVID to the time of the survey and then forward, 54% back and 49% forward said similar usage. Similar levels would use both kinds of vehicle either more or less although the focus was towards more increased usage looking ahead than between pre-COVID and the survey period. Generally, 6% each time said they would use each kind of vehicle less, although 13% said they used hackney carriages less now than pre-COVID.

People were asked their current views regarding COVID safety measures:



Key: E – essential, I – important – U – useful N – of no importance.

The graph shows most are no longer important, apart from for a screen between driver and passenger (25% said this was essential) with 19% saying that it was clear a driver had cleaned the vehicle remained essential. However, the overall view is such measures are now receding.

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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.

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.

For this survey, we issued emails to a wide range of key stakeholders and gave them opportunity to respond using an on-line form. Just one individual responded. They said they used local licensed vehicles. They phoned for vehicles and were not aware of any ranks. They were a wheel chair user who could only travel in a wheel chair and said there were no companies providing such vehicles at all in Stevenage.

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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 behaviour.

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. For this survey the council issued the link electronically, with the existence of the survey advertised at a Forum meeting. This was issued at the start of January, giving four full weeks for return. There were some 49 (28 last time) responses, a good improvement from the previous two surveys. A check was made to ensure there were no duplicate entries or any other obvious ways to affect the results. None were found.

84% said the licensed vehicle trade was their main or only source of income. 10% worked part time with no other sources of income whilst the final 6% said they were working part time and had other sources of income.

Share of responses:

	2022	2017	2014
Hackney carriage	61	68	75
Private hire	33		
Drive Both	6		

61% (68% last time, and 75% previously) of responses were from hackney carriage. 33% were from private hire and 6% from those saying they drove both kinds of vehicle.

In 2022, the overall average length of service was 17 years (14 last time), however for hackney carriages the value was 21 (15), private hire 10 (11) and those driving both 18. Maximum years were 49 hackney carriage, 30 private hire and 27 years for those driving both.

Licensed Vehicles number of days worked:
(not all numbers shown for clarity, to highlight main changes)

	Hcv		Phv	
	2022	2017	2022	2017
7 days	26	33	27	
6 days	43	50	43	33
5 days	23		27	44
4 days	4		3	
Did not work	4			
Average week	5.9		5.1	
Average hours	53	53	37	45

For the hackney carriages, 43% worked six days (down from 50% in 2017), 26% seven (again down from 33%), 23% five, 4% four and 4% had not worked. For private hire, 43% worked six (up from 33%), 27% each for five (down from 44%, the highest for private hire in 2017) or seven and 3% four days (very similar to the hackney carriage). The three who drove both kind of vehicle worked five, six or seven days.

However, the average week was 5.1 days for private hire, 5.9 hackney carriage, 6 for those driving both and 5.7 across the full responses. Average hours worked were 53 (same as in 2017), 37 (45 hours in 2017), 52 and 48 respectively overall. These figures suggest shorter hours for private hire than hackney carriage. This is consistent with national suggestions that many private hire companies now tend to restrict working hours to protect their driver work-life balance. The maximum for hackney carriage drivers quoted was 80 hours, for both vehicle drivers 70 and for private hire 60, reiterating the results.

People were asked which kind of work they normally undertook. Many provided multiple responses. From all the responses, which covered all three different categories, 37% did immediate hire, bookings, 36% immediate hire ranks, 15% advanced hire, 9% contracts and 3% chauffeur or corporate. Half the contract work was for Hertfordshire, a quarter for 'Stevenage Taxi' 1.5% for a school and 12.5% for another specific transport company.

81% (86% last time) of the full sample said they owned and drove their own vehicle. Just 4% (reduced from the 7% of 2017) said someone else drove their vehicle at times they were not using it. All five of those responding to the question if sharing vehicles had changed since COVID said that it had, i.e. there has been a reduction in sharing of vehicles.

80% of those responding (92% of the total) said they accepted pre-bookings. 66% of these were via a company, 14% by a pda terminal, 14% by phone and 6% from return bookings.

Rank usage

	2022	2017
Station	44	35
Old Town	18	16
Town Centre	14	16
Lister Hospital	13	11
High St	8	5
Leisure Park	1	14

In terms of ranks served, the most frequent mentioned was the railway station, with 44% (increased from the 35% of last time) of all the mentions given by hackney carriage drivers. 14% (16% last time) said town centre, 18% (16%) Old Town, 1% (14%) Leisure Park, 13% (11%) Lister Hospital and 8% (5%) High Street. This seems to confirm the strong reduction of use of the Leisure Park rank noted in the rank work and shows the station has increased its share of provision of custom.

When asked what issues affected their choice of when to work, mainly hackney carriages responded. 23% said there was more lucrative work available at night (partly due to higher fare rates and partly due to less vehicles working) whilst 23% said they avoided working hours when passengers might be disruptive (presumably a different set of drivers). 18% said they worked around family commitments, 12% preferred mornings and 6% said they focussed on school work.

Of the six private hire respondents, two thirds said they worked to suit family life. The other two said mornings and when they had bookings.

All the hackney carriages told us how levels of rank passengers had changed from levels of three years ago, i.e. roughly pre-COVID. 70% said fares were down between 25 and 74%, 20% said 1-24% less, 3% said the same whilst 7% said up 1-24%. Many suggested the change to working from home was a major contributor whilst one mentioned a lot of work having gone to people using apps.

In terms of bookings, for hackney carriages 32% said these were down 25-74%, 24% said down 1-24%, 24% said they were the same, 8% said down 75 to 100%, 4% said up 1-24% and 8% up 25-74%; for private hire a third said down 1-24%, a third 25-74% less, 11% 75-100% less, 11% the same and 11% said up 75-100%. This presents a mixed picture, but generally a downward trend as for rank work.

74% of those responding felt there were enough hackney carriages in Stevenage at this time.

All but one answered the question if the limit remained appropriate.

Does the limit on hackney carriage vehicle numbers remain appropriate?

	2022				**2017**
	hcv	**phv**	**Both**	**Average**	**Phv**
Yes	80	44	100	69	22
No	20	50			78

80% of hackney carriages responding said they felt it did. 50% (78% last time) of private hire did not feel it remained appropriate, although 44% (22% last time) of them did think it should remain. All those saying they drove both kinds of vehicle said they supported the limit. For the full set of respondents, 69% agreed with retaining the limit. This is a clear change in favour of overall views of the trade in retaining the limit and more notably from those in the private hire element of the trade, who often oppose limits, given that the main desire for restricted plates tends to be from private hire drivers wanting the hackney carriage ‘freedoms’.

However, there were 20% of hackney carriage who did not agree with the limit most of whom reiterated the point by saying they did not feel the limit benefitted the public, but giving no further explanation.

A few suggested why they thought the limit benefitted the public. 43% said it restricted over-ranking, 43% said it helped customers recognise drivers and 14% said it reduced the level of drivers that felt they had to work long hours. Many simply pointed out there were already too many hackney carriages and that waiting time for fares was generally high. One person, however, suggested hackney carriage drivers picked when to work and often left people unable to get vehicles at ranks.

Most drivers never got people either travelling in wheel chairs or transferring from ranks, bookings or contracts (ranging from 33% to 75%). 27% said they got yearly wheel chair trips from ranks (29% for transferring) and 11% said monthly 9 (18% transferring). 3% said daily trips for ranks for both wheel chair and transfer travellers. For bookings these daily values increased to 12% and 15%.

35% of those answering the question (98% of respondents) said they were aware of drivers that had given up due to COVID. Numbers quoted varied from 1 (19% of respondents) to 30 (13% of respondents).

There were very few other comments as most had provided their views within the earlier questions providing option for comment. Many mentioned the high level of app-based companies they felt had taken a good proportion of work from both hackney carriage and private hire. Others spoke of need for a well-located good central area rank. Some felt the station was the principal rank but that it was not fair they had to pay to use that location.

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7 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.

History of deriving the ISUD index

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 off-peak factor). 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 (the general incidence of delay).

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).

Calculation of ISUD Index

The ISUD index is the result of multiplying each of the components together and benchmarking this against the cut-off value of 80.

In other words, multiplying:

- Average passenger delay by
- Off peak factor by
- General incidence of delay by
- Seasonal Index by
- Peak index by
- Latent demand factor

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, allowing for the fact that meeting peaky demand is much more difficult for the same size fleet.

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.

As discussed above, the area has several council owned and operated ranks, but also two privately operated locations. The Leisure Park rank is on private land, but has no separate requirement for vehicle licensing. The station rank, is however, different, and needs a permit from the rail operating company, which is charged for. This restricts access to this location to a subset of the hackney carriage trade. The local council has very little control over this additional regulation given that the railway land is private and that the operators of the land can do as they see fit. This does mean that the council cannot influence easily the number of vehicles servicing this location.

This means that this particular rank needs careful consideration in terms of unmet demand and its significance, as the supplementary restrictions further complicate the issue were unmet demand found to be significant principally due to the station rank operation. However, case history also suggests that unmet demand must be considered across the area as a whole, rather than at one specific point, though this has to be tempered by the structure of the industry as some areas only have one active rank.

The table below compares elements of the unmet demand equation for each survey undertaken.

Year	2022		2017		2014		
Element	Council only	All ranks	Council only	All ranks	Council only	+ Leisure Park	+ Stn
Average pass delay (APD)(minutes)	0.05	0.38	0.3	0.25	0.13	0.25	0.22
Off Peak	16.67	22.5	0	12.5	19	19	17
Proportion of people in hours with over 1 min APD	0.12	14.62	12.87	11.66	1	4.4	4.2
Peak factor	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Latent demand	1.0	1.0	1.005	1	1	1	1
Seasonality	1	1	1	1	1	1	1
Overall ISUD	0.05	63.03	ZERO	18.31	1.2	10.3	7.7

(Please note values quoted are from detailed calculations in the analysis software, so overall ISUD may not match number calculated using rounded values from Table above).

For this survey, our initial evaluation covers the council ranks only. For these, the average passenger delay for the observed hours was just 0.05 minutes (three seconds) although off peak delay levels were 16.67%, not the zero from 2017 that set the overall index to zero then. However, the overall index of significance of unmet demand is just 0.05, almost zero.

However, a test has to be done including the station even though this is a private rank. Average passenger delay (at 23 seconds), off peak delay and over a minute delay factors are all higher, and result in an index of 63.03, much closer to the level of significance value of 80. However, as already explained, even if this suggested more plates were needed, this would be futile as the Council could not ensure any of them ended up at the location as the control of plate numbers there is under independent control by the railway operator.

However, this does, as in the last survey, suggest there remains an issue with sufficient plates servicing the station rank which is shown up by the ISUD index implying poorer service there. This needs to be discussed with the rail operator although the level of ability to influence the Council has is limited, but this coul well colour public views of the overall service provided.

Further discussion of the overall impact of this occurs in context below within the summary and synthesis, ensuring the ISUD statistic is seen in full context of the overall information database available to determine how significant levels of unmet demand are at this snapshot.

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8 Summary, synthesis and study conclusions

This Unmet demand survey on behalf of Stevenage Borough Council has been undertaken following the guidance of the BPG and other recent case history regarding unmet demand and its significance. This chapter first provides a summary by chapter of our main evidence gathered. It then draws the individual evidence together to provide study conclusions. The final Chapter provides recommendations based on these.

Background and context

Stevenage has limited its number of hackney carriage vehicles since at least 1994 when this was first recorded in official DfT statistics. Regular independent surveys of unmet demand are undertaken alongside higher level review of the overall policy as appropriate. This latest independent review continues to use the current DfT Best Practice Guidance of April 2010 to guide our methodology, as well as drawing from appropriate case history and developing industry standards.

This survey began with appointment on 12th October 2022, seeing rank observations in November, on-street interviews in November/December, trade views during January / February 2023 and key stakeholder views through the full period of development of this report, up to early June 2023. Evaluation has been undertaken based on the current legal, guidance and research state of the art for unmet demand surveys as at June 2023.

Stevenage has a currently increasing population and is one of the districts within the higher tier Hertfordshire authority which generally has transport and highway powers, apart from in the central Town centre (an inheritance from the New Town nature of this town centre). Since the last study, the full Thameslink service has been introduced linking Stevenage directly to central London and Horsham / Brighton and all trains servicing the station are now made up of recently introduced rolling stock.

The new bus station is now adjacent to the railway station, albeit across an improved pedestrian route over Lytton Way.

Private hire vehicle numbers have reduced strongly since the last survey with strong reduction prior to the pandemic enforced by that period, with only small levels of resurgence since. The hackney carriage fleet with its limit remained stable with no known loss of vehicles due to the pandemic. Driver numbers did not fall as much and their reduction appeared to lag the drop in vehicle numbers. The dual driver nature of the operation means no distinction in changes of hackney carriage or private hire is possible.

In terms of wheel chair accessible content, the level has been stable at 30% of the hackney carriage fleet for some while, with a slight dip at one point, but with private hire WAV seeing a major drop just ahead of the pandemic with some resurgence ahead of the survey. Compared to national statistics, Stevenage is doing well for WAV provision particularly on the hackney carriage side.

Rank observations

Similar observations were undertaken in November 2022 to those undertaken in the previous surveys. Overall, demand for hackney carriages is peaky focussing on high night demand, with Saturday midnight seeing the major peak in passenger numbers, nearly three quarters of which come from passengers at the railway station.

Daytime demand is heavily focussed on the station, although the hospital does see small amounts of usage. The main supermarket does receive hackney carriage service, but only on a booking basis so this demand has not been included in the rank usage statistics. What was the developing town centre rank was unused at the time of the survey with the move of the bus station away from that location.

In terms of estimated typical weekly rank usage, the station provides 79% of estimated total demand, up from 69% last time. High Street on weekend nights sees a further fifth of the demand (same as last time) with the hospital providing just under 2% of passengers. Overall estimated weekly demand is down 44% with current flows the lowest ever recorded (back to 2002). Prior to this Stevenage had been against the national trend of patronage reduction having seen flows grow between each survey and the next (9% from 2014 to 2017 and 55% from 2002 to 2017, with no pre-pandemic values it is not totally clear what the full loss from the pandemic has been). These values exclude any Leisure Park passengers although we believe these are no longer of any great significance.

National rail statistics show a rail patronage decline of 30% over the period since the last survey whilst station hackney rank usage appears to have decreased by 36%, which appears consistent. The overall decline of 44% is partly accounted for by the changes in the retail park situation but mainly by the reduced rail patronage.

There was one passenger observed accessing hackney carriages at the hospital rank during our survey in a wheel chair (there were none at all last time), though six (three last time) apparently disabled persons were observed at High Street and the station ranks (one at High Street and five at the station). In terms of vehicle movements by hackney carriages, 47% (45% last time) of those observed were of vehicles with body styles that might be identified as WAV, a higher proportion than actually exists in the current fleet (30%). The concern here is that the fleet may give impression that it is more wheel chair accessible than in actuality, which could give rise to passenger frustration, although this has not actually changed since the last survey.

In terms of abuse of ranks, the Westgate and Hospital ranks, most open to abuse, were, as in 2017, the place of most private car abuse, with a higher 25% (17% last time) of all vehicle movements observed in our surveys being private cars at or near ranks. This is a national trend which we believe has developed more following the pandemic when people needing to use cars more found space at lesser used ranks and have tended to continue this usage even when the hackney carriages returned.

Private hire vehicles accounted for just 1.5% (3% last time) of movements. There were no discernible out of town vehicles observed in this survey.

The station rank remains on railway land and administered by a parking company authorised by the current train operating company. This reduces further the number of vehicles from the fleet which can use this location. However, there is a counter impact that some vehicles not able to use this location therefore service ranks which many not otherwise see as much use by vehicles, which leads on to more use by passengers seeing vehicles than might otherwise be the case. Again, this has not changed since 2017.

Two thirds of the available hackney carriages were observed active during the Saturday of observations (as in 2017). Activity levels were very similar to those in the previous two surveys. However, there was a notable switch with less vehicles observed in the later time periods, again a national trend whereby people find themselves able to earn more in preferred operating periods, with a reduced overall service level resulting.

On street public views

The on-street survey found 73% (27% last time) saying they had used a licensed vehicle in the area in the last three months, a strong increase from the low values found in 2017. Further, a relatively high 25% said they used hackney carriage only. The estimate of 62% of licensed vehicle usage being by hackney carriage from the frequency statistics is similar to the estimate from the stated methods of usage (max of 59%).

Trips per month were also higher than in 2017 for overall licensed vehicles and for hackney carriage usage. Overall the comparison between 51% using phone or app and 49% rank or hail is much closer than in most other recent surveys.

There also appears to have been strong competition since the last survey. It appears that most pure private hire companies have lost share whilst the mixed fleet (hackney carriage and private hire) company has gained share, as has an international app (but only taking it to third place in overall company mentions). This seems very healthy for the hackney carriage industry in the area.

Further, more people were aware of ranks, but this was principally for the station rank. Westgate rank was mentioned but all but two respondents said they did not use it. Overall, views of the service provided by licensed vehicles tended to be ‘good’. Most positive was driver knowledge of the area. Most negative was price, supported by 79% of all responses to what might encourage people to use hackney carriages or increase use of them was if they were more affordable. The level of people seeking more hackney carriages to phone for was strongly reduced (33% last time to 11% now), with a slight reduction in call for more hackney carriages at ranks (8% last time, 6% now).

A high level of need for adapted hackney carriages was suggested, with the focus being wheel chair accessible styles. This was not borne out by actual usage although the current high level of WAV in the hackney carriage fleet and the high level of their incidence of usage seems to match the higher need identified.

Measurable latent demand has reduced from a very low 0.5% to zero this time. 59% felt there were enough hackney carriages in the area.

Key stakeholder views

The national trend of lack of willingness of key stakeholder to provide any comment regarding licensed vehicle services applied to Stevenage. Just one person responded, who mainly phone for vehicles and claimed there were no companies providing WAV style vehicles for their usage, which required them to travel in their wheel chair.

Trade views

An increased level of response (49 compared to 28 last time, which then was 10%) came to our on-line trade survey, to which drivers were alerted by a letter issued to them by the Council. 84% of respondents said the trade was their main or only source of income with 10% part time but with no other sources of income and 6% part time with other sources of income.

61% (68% last time) of these said they drove hackney carriages. Average experience was 17 (14) years and also showed a very good range of experience in terms of years.

Hackney carriage drivers tended to work longer hours (average of 5.9 (six) days / 53 hours compared to 5.1 (five) days / 37 (45) hours). Maximum hours were 80 hackney carriage and 60 private hire (having been similar for both kinds of driver in 2017). Nearly all were owner-drivers (but a reduced 81% compared to 86% in 2017).

Half (58% in 2017) of hackney carriages said they were related to phone circuits, with 75% (66% in 2017) of private hire stating this.

44% (35%) of all ranks quoted as used by the trade were the station, followed by 14% (16%) for town centre and 18% (16%) Old Town (with a further 8% (5%) for High Street), 1% (14%) for the Leisure Park, and 13% (11%) for Lister Hospital, suggesting a good use of all ranks but confirming the apparent loss of the Leisure Park location.

Interestingly, whilst 23% said there was more lucrative work available at night, 23% said they avoided these hours. Those saying they worked those hours said part of the reason was that less were now servicing those periods. There was a general statement that people now focussed work on quality of life rather than need for work.

80% of hackney carriages supported retaining the limit whilst 44% (up from 22% in 2017) of private hire also supported retention. This meant 69% overall were in support.

Concerns raised included the high level of app-based companies that they felt had taken a good proportion of work from both sides of the trade. Others spoke of need for a well-located central area rank. There was concern that the main rank had to be paid for in addition.

Formal evaluation of significance of unmet demand

For this survey, excluding the station rank due to it being private, average passenger delay has reduced as has the proportion of passengers travelling in hours with over a minute average passenger delay, but off-peak hours with delay have changed from being zero to being 16.67%, meaning the ISUD index has increased from zero to 0.05, a long way from being significant.

The test including the private station rank saw all elements apart from latent demand increasing, with the overall index increasing to 63.04 from 18.31, which is still below the cut-off value of 80 which identifies unmet demand as being significant, but much closer to it. However, as already noted, even if the Council determined it needed to add more plates, the extra permit fee and requirement means these would almost certainly not benefit the service there.

Synthesis

Although the headline of a 44% reduction in passenger numbers since 2017 is a negative outcome from the survey, as is the loss of both the potential patronage for the main central rank and the private overnight rank, there are many other positive points identified.

The fact that hackney carriage vehicle numbers have been retained against a large drop in private hire, whilst the mixed (private hire and hackney carriage) operator being one of the two seeing gains in usage since 2017 compared to reductions for the larger private hire only operators in quotations, suggests the limit has had positive impacts for the public of Stevenage, and that the hackney carriage trade has fought back despite some clear increase in use of international app-based bookings. It appears that reduced private hire vehicle numbers may have been compensated for by more hackney carriages joining or undertaking more booked work.

While it is clear that one international app operation has gained patronage in the area there is also clear evidence that the hackney carriage trade also appears to have benefitted (albeit perhaps in bookings to the mixed fleet private hire operation element).

There remains need for a central area rank to replace the one that in the last survey was seen to be growing in usage before its main demand generator was removed.

Comparing the latest national rail patronage values to the estimated rank passenger departures suggests 10% of all rail arrivals at Stevenage station depart using hackney carriages from the rank there. Compared to the previous survey, rail passenger numbers are down 30%, whereas for the same period rank passengers are down 36%, relatively similar.

Yet despite this, the previous issue of poorer service to these customers remains (and must therefore relate to the imposition of the external restriction on access from the rail company). The exact issue of if more permits are needed or if current users need to be made aware of the issues would need further analysis (which could be undertaken).

Conclusions

There is no evidence of any unmet demand in the Stevenage area which is significant and requires issue of any further standard hackney carriage plates at this time.

There is significant need for the licensing authority to work with planners at both authority and county level to provide a public rank that is where need might be in the town centre, and to commit to developing this.

The increased reliance of hackney carriage on the station demand is a concern – albeit that within the confines of the restrictions the trade is doing its uttermost to provide services there. It is very unfortunate that the plans moving the bus station did not appear to consider this impact on what was believed to be a significantly developing rank at the time of the last survey. The fact there is no significant reference to hackney carriage or private hire in the latest transport policies is also an apparent omission that new Government policy may re-emphasise in due course (the new BPG, although the 2010 version did also reference need to include local licensed vehicles in Local Transport Plans).

The issue of poor service to some vulnerable persons still needs attention, although the bald statistics suggest the issue is more with marketing than with actual numbers. With regard to difficulties in getting appropriate vehicles (mainly by phone), further thought and action needs to occur, beginning with frank and open discussions between those with issues, licensing and the trade. The key must be engendering confidence in those with disabilities that they can get vehicles they need when they need them, a much harder matter to achieve.

It should be noted that the issue is not shortage of WAV style vehicles – there are more than the national average in the hackney carriage fleet – it is clear and advertised access to them that seems to be the issue.

Discussion is needed with the rail operator and its car park provider regarding the negative impact of their permit policy on customer service there – although this may not readily be possible.

9 Recommendations

On the basis of the evidence gathered in this Unmet demand survey for Stevenage 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 Stevenage Borough Council licensing area. The committee therefore has the option of retaining the current limit of hackney carriage vehicle numbers which could be defended if necessary.

There is need to identify a new town centre rank and encourage its use. This needs work between the trade, the council and the shopping centre to work out ways appropriate signing and advertising can be undertaken.

The issue of poor service to a small number of vulnerable people must be dealt with to enable them to travel safely and appropriately – this mainly relates to ensuring the good provision in the hackney carriage fleet can be accessed by those preferring to book vehicles.

The option of a demonstration day for wheel chair and other accessible vehicles could be considered. This would allow the trade, councillors and those needing access to such vehicles either for themselves or for clients, such as care home representatives, to interact and build good will in this very important area. We believe this option should produce more positive results than any immediate issue of further wheel chair accessible hackney plates. However, within the discussions with the trade, this option must also be included if improved service could be viewed as being vulnerable due to insufficient vehicle numbers.

Within these discussions there may be need for agreeing a clear way that wheel chair accessible capable vehicles were clearly identified, e.g. with some form of label as some authorities provide (e.g. Leeds). The issue of producing a list of wheel chair vehicles and drivers should also be seriously considered and the conclusions of this publicised.

These factors could be drawn together in an Integrated Service Plan as recommended by the currently draft new Best Practice Guidance, if this is recommendation is confirmed in due course.

Given the potential for further increase in demand, the next independent review should have rank reviews no later than November 2025. It may be prudent to review peak service at the station in March 2024.

From the trade point of view, the hackney carriage trade is perhaps in a better position than it may believe. There appear to be opportunities to market and grow their share particularly through the mixed fleet operation element which seems to have gained traction with the public.

Appendix – Detailed Calculations for ISUD index

The index of significance of unmet demand (ISUD) is an industry standard tool developed first when the 1985 Transport Act Section 16 was introduced. At time of first introduction, the determination if the level of observed unmet demand was significant or not was generally subjective by those undertaking the independent review. An objective index was developed and a set of in the order of 12 decisions reviewed in the light of the index. It was found that all determinations of the level of the ISUD index being significant saw the index calculated being 80 or above. This has become industry standard. Following court review, an extra element was added to cover observable latent demand, accepting this was almost certainly an underestimate.

The calculation of the various elements of the index comes from the rank data collected with the exception of the latent demand value which comes from specific questions in the public interviews.

Whilst some claim that the index is very accurate and precise and should not be used other than in a strict manner, our view is that it is a tool that needs to be used within the overall database of evidence in full context. As with all mathematical formulae, it can appear very precise and prescriptive. However, this is not our view, and on that basis we tend to quote the calculated values only to no more than two decimal places.

For example, a key start statistic is the average passenger delay. This is calculated from the rank observations. Whilst we calculate that from actual observations, some do this from a summary set of observations. It results in a number of minutes and seconds. The index requires this to be converted to a decimal format. Given that there are 60 seconds in a minute, this often results in very long accurate values, e.g. 1 second is 0.16666667 minutes. When multiplied by other similarly detailed values, very long detailed numbers can be generated.

For the sake of clarity and transparency, the detailed calculations to the full number of decimal places available are shown below for the two quoted 2022 values below:

	Council ranks only, i.e. less station	All ranks
Average passenger delay, minutes (APD)	0.05000000000000000	0.38333333333333300
Off peak proportion of hours	16.66666666666670000	22.50000000000000000
Overall proportion of total passengers in hours with over 1 minute APD	0.12350761630300500	14.61506792918900000
Latent Demand	1.00000000000000000	1.00000000000000000
Peak factor	0.50000000000000000	0.50000000000000000
Seasonality	1.00000000000000000	1.00000000000000000
Overall ISUD	0.05146150679291890	63.02748044462740000

We have not provided the full detailed spreadsheet of rank observations that feeds the top three values although this can be provided if required. Whilst change could occur from detailed review, we do not believe that there are any changes which would lead to any reversing of the decisions made regarding unmet demand and its significance given the values are some way from the cut-off of 80.