



Hackney Carriage Unmet Demand Survey

Dover
April 2023



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Executive Summary

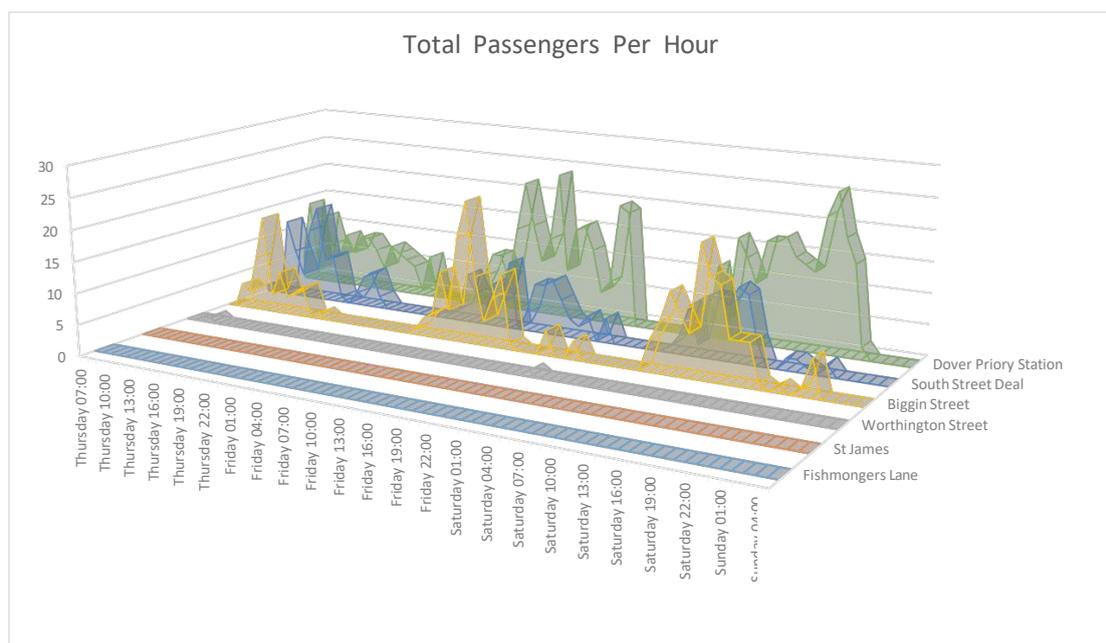
This Hackney Carriage Unmet Demand Survey has been undertaken on behalf of Dover Council, following the guidance of the April 2010 DfT Best Practice Guidance document, and all relevant case history in regard to unmet demand.

The council maintains a limit regarding the number of hackney carriages which may be licensed. The current limit is set at 69 vehicles.

Data has been collected through consultation with key stakeholders, the trade and members of the public. In addition, observations of activity at taxi ranks were undertaken to record volumes of hackney carriages and passengers using each rank and whether any passengers had to wait for hackney carriages to arrive at the ranks.

Surveys were undertaken at taxi ranks in Dover, over three days, from Thursday 16th June 2022 to the early hours of Sunday 19th June 2022. Video cameras were used to record activity at the taxi ranks during this period and the levels of activity during active periods were tabulated and analysed.

The relative levels of activity at the ranks are presented in the following figure.



A total of 733 passengers were observed boarding Hackney Carriages.

For the majority of passengers, Hackney Carriages were found at the ranks, waiting for passengers. However, 248 passengers (33.8% of passengers) had to wait at the ranks for Hackney Carriages to arrive.

A hackney carriage unmet demand survey was undertaken in 2017. The total passengers observed during the 2017 survey was 1,779. The number of passengers observed dropped to 733 passengers in 2022.

69 passengers (3.9% of passengers) were observed waiting for hackney carriages to arrive at the ranks in 2017. The number of waiting passengers rose to 248 in 2022.

With regard to features such as; vehicle condition, availability, driver professionalism, knowledge and appearance, public and stakeholder perception of the Hackney Carriage fleet was generally favourable.

However, there was evident discontent amongst public and stakeholder respondents with the level of availability of licensed vehicles in general.

A significant proportion of hires undertaken by hackney carriages in Dover District are pre-booked hires.

The number of licensed vehicle drivers working in the trade has dropped since pre-covid times. Also, the number of private hire vehicles licensed in Dover District has dropped since pre-Covid times. As demand for licensed vehicles has recovered from the impact of Covid-19 mitigation measures, the level of supply has not kept pace. Consequently, the number of rank hires observed has dropped significantly and the level of latent demand for hackney carriages has increased. This high level of latent unmet demand is indicative of people who would like to hire hackney carriages from ranks, but cannot, because not enough are available.

Changes in the availability of hackney carriages at the ranks has been a consequence of several factors. These are summarised as:

- Reduced number of hackney carriage drivers
- Reduced number of private hire vehicles and private hire drivers
- Less wait time between hires of hackney carriages
- Changes to working practices, with reduced willingness to work anti-social hours.

The number of hackney carriages which are licensed remain the same as the number prior to Covid-19. However, some drivers of these hackney carriages are no longer operating in the trade. The reduction in private hire drivers and vehicles appears to be more significant than the reduction in hackney carriage drivers. Consequently, some of the shortfall in capacity in the private hire fleet appears to have been taken up by hackney carriages undertaking pre-booked hires. The level of demand for pre-booked hires has led to reduced wait times between bookings and less time for hackney carriages to visit the ranks. With fewer drivers and fewer licensed vehicles operating, competition between drivers has reduced. It appears that, as a consequence of reduced competition,

drivers are better able to choose the hours that they would prefer to work. Some drivers will avoid working anti-social hours at night, if they don't need to work these hours. Also, some hackney carriages were previously driven by multiple drivers and the second driver worked the night hours. Many of the second drivers who operated hackney carriages at night are the drivers who have left the trade. Consequently, coverage of night time hours appears to be disproportionately affected by the reduced number of drivers.

Several coefficients are calculated from the rank survey results and from public consultation. The coefficients are entered into a formula to calculate the Index of Significant Unmet Demand (ISUD). The index value for the 2022 survey was 366.6. This value exceeds the threshold value of 80, and suggests that there is significant unmet demand.

The ISUD value, considered along with feedback from stakeholders and the public leads to the conclusion that there **is significant unmet demand**.

In order to reduce the level of unmet demand, additional licensed vehicle capacity would need to become available.

Hackney carriages and private hire vehicles are operated as independent businesses and the Council cannot exert direct influence on where and when licensed vehicles are operated. The Council can control the maximum fares tariff for hackney carriages and the number of hackney carriages licensed. Therefore changes to the limit on the number of hackney carriages licensed and/or the taxi fares tariff could be considered, if it was felt that such measures could increase the level of availability of licensed vehicles.

Some potential measures which could be considered, in order to increase the level of availability of hackney carriages to meet rank based demand are as follows:

- **Do nothing** – There is some interest from people who would like to become licensed drivers. Over time, it is likely that the number of licensed vehicle drivers will increase. Similarly, it is likely that some new drivers will also license a private hire vehicle which they will operate.
- **Increase the number of hackney carriage licences** – Feedback from the trade indicated that if more hackney carriage licences are released, some of these licences would be likely to be taken up by existing licensed vehicle drivers, who currently own and/or drive a private hire vehicle. They would convert their private hire vehicle licence to a hackney carriage licence. As such, the net increased availability of licensed vehicles may be limited. However, some additional capacity would be likely to be provided by new drivers entering the trade, either to directly operate a new hackney

carriage licence, or to fill the gap left by existing drivers transferring from operating a private hire vehicle, to a hackney carriage vehicle.

- **Change tariff 2** – Hackney carriage fares increase by 50% after midnight, when the fares change from tariff 1 to tariff 2. If the changeover time was moved to an earlier time, this may encourage more drivers to work evenings and nights.
- **Increase fares** – The hackney carriage fares level in Dover District is below average for the country as a whole. Potentially, increased fares income could encourage more people to become licensed vehicles drivers.

In addition to the limited availability of licensed vehicles perceived by stakeholders and the public, a particular issue was identified, regarding availability of wheelchair accessible licensed vehicles.

The number of wheelchair accessible hackney carriages and wheelchair accessible private hire vehicles, licensed in Dover District, has declined in recent years. In 2013, there were 26 wheelchair accessible licensed vehicles (10 HC & 16 PHV). By 2022, the number of wheelchair accessible vehicles had dropped to 8 (2 HC & 6 PHV).

The lack of wheelchair accessible licensed vehicles is a significant problem for wheelchair bound residents of the District. Perceived cuts to bus services and hospital transport services, coupled with the reduced number of wheelchair accessible licensed vehicles available has increased the problems experienced with travel. The issue has been further exacerbated since Covid, with the general reduction in licensed vehicle capacity, associated with reduced driver numbers.

With respect to measures aimed at increasing availability of wheelchair accessible licensed vehicles, there are some potential measures which may be explored:

Identify the potential income from targeting mobility impaired passengers – People with mobility impairments tend to use licensed vehicles more frequently than the general public at large. In some parts of the country, mobility impaired users are successfully targeted by operators who have identified this as a valuable market sector. Where reliable services are provided, mobility impaired passengers are more likely to travel for discretionary trips, such as to restaurants and cinemas etc.

Issue additional hackney carriages vehicle licenses for wheelchair accessible vehicles only – Additional wheelchair accessible vehicles in the hackney carriage fleet may provide additional opportunities for wheelchair users to hire an appropriate vehicle. However, it should be noted that there is no guarantee that any holder of a wheelchair

accessible vehicle hackney carriage license will actively seek hires from wheelchair users.

Recommendation

In order to take action to address the shortfall in hackney carriage capacity available to the travelling public, the potential measures available for the Council to implement are limited. It is not feasible to directly apply measures to recruit additional drivers, or to force more drivers to operate at night.

Measures are limited to increasing the number of hackney carriages which may be licensed and increasing the fares which may be charged by hackney carriages.

Recommendations regarding changes to taxi fares are not covered within the scope of this study. However, a recommendation is made regarding the number of additional hackney carriages which would need to be licensed, in order to address the level of unmet demand.

In order to bring the level of unmet demand measured by the ISUD index, to a value below 80, the number of hackney carriages would need to be increased by 5.

Incidences of passenger waiting, with the introduction of 5 more hackney carriages, will not be completely reduced to zero. However, it is anticipated that fewer passengers would have to wait at taxi ranks and the wait times would be lower. In consequence, the level of unmet demand would be anticipated to fall below the threshold value which is deemed to be significant.

The availability of wheelchair accessible licensed vehicles has declined in recent years. There has been feedback through consultation that the lack of availability of wheelchair accessible vehicles significantly limits travel opportunities for some disabled users. Consequently, if additional hackney carriage vehicle licences are released, the Council may want to consider applying vehicle type conditions to ensure that any additional hackney carriage vehicles are suitable wheelchair accessible vehicles.





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1 General introduction and background

Dover Council is responsible for the licensing of Hackney Carriage and Private Hire Vehicles operating within the Council area. It retains a limit on the number of Hackney Carriage vehicles licensed. There is no legal means by which either Private Hire Vehicle numbers, Private Hire or Hackney Carriage driver numbers, or the number of Private Hire Operators can be limited.

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

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

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

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

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

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

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

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

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

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

- To give the passenger such mobility assistance as is reasonably required

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

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

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

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

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

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

2 Local background and context

The authority has a current population of 118,514 based on 2020 DfT statistics, which in turn are used to reference current licensed vehicle statistics.

All licensing authorities have full powers over licensing the vehicles, drivers and operators serving people within their area. Dover Council has chosen to utilize its power to limit Hackney Carriage vehicle numbers.

Dover Council undertakes regular review of its policy to limit Hackney Carriage vehicle numbers in line with the BPG.

Table 1 and Figure 1 illustrate the fleet composition for the licensing authorities in the South East Region (as defined by the DfT). The authority statistics are grouped by whether the authority limits the number of Hackney Carriages or does not limit. Within these groups, the authorities are arranged in order of increasing licensed vehicles per 1,000 population.

Licensed Vehicle numbers are based on March 2022 figures and Mid 2020 population data.

The statistics for Dover are: 0.6 Hackney Carriages per 1000 people and 0.8 Private Hire Vehicles per 1000 people. These proportions combine to form a total (allowing for rounding) of 1.4 licensed vehicles per 1000 people.

The proportion of licensed vehicles in Dover is second lowest out of all the licensing authorities which limit the number of Hackney Carriages.

Table 1 - Comparison of Licenced Vehicles per 1,000 population

Licensing Area	Mid 2020 population estimate	Hackney Carriages	Private Hire Vehicles	Total licenced vehicles	Hackney Carriages per 1,000 population	Private Hire Vehicles per 1,000 population	Total licenced vehicles per 1,000 population
Maidstone [Limited]	173,132	48	141	189	0.3	0.8	1.1
Dover [Limited]	118,514	69	92	161	0.6	0.8	1.4
Test Valley [Limited]	127,163	44	168	212	0.3	1.3	1.7
Tunbridge Wells [Limited]	118,939	107	134	241	0.9	1.1	2.0
Mid Sussex [Limited]	152,142	154	168	322	1.0	1.1	2.1
Slough [Limited]	149,577	103	373	476	0.7	2.5	3.2
Brighton and Hove [Limited]	291,738	590	395	985	2.0	1.4	3.4
Thanet [Limited]	141,458	92	398	490	0.7	2.8	3.5
Milton Keynes [Limited]	270,203	201	790	991	0.7	2.9	3.7
Havant [Limited]	126,339	36	490	526	0.3	3.9	4.2
Portsmouth [Limited]	214,692	202	721	923	0.9	3.4	4.3
Oxford [Limited]	151,584	107	546	653	0.7	3.6	4.3
Southampton [Limited]	252,872	281	1,025	1,306	1.1	4.1	5.2
Reading [Limited]	160,337	216	660	876	1.3	4.1	5.5
Crawley [Limited]	112,474	123	547	670	1.1	4.9	6.0
Wokingham [No Limit]	173,945	64	78	142	0.4	0.4	0.8
Runnymede [No Limit]	90,327	48	35	83	0.5	0.4	0.9
Spelthorne [No Limit]	99,873	55	49	104	0.6	0.5	1.0
Horsham [No Limit]	145,474	46	115	161	0.3	0.8	1.1
Dartford [No Limit]	114,051	66	70	136	0.6	0.6	1.2
Arun [No Limit]	161,123	192	17	209	1.2	0.1	1.3
Bracknell Forest [No Limit]	124,165	55	117	172	0.4	0.9	1.4
Rother [No Limit]	96,716	102	34	136	1.1	0.4	1.4
Gosport [No Limit]	84,679	61	65	126	0.7	0.8	1.5
Tandridge [No Limit]	88,542	92	42	134	1.0	0.5	1.5
Ashford [No Limit]	131,018	102	97	199	0.8	0.7	1.5
Mole Valley [No Limit]	87,547	100	33	133	1.1	0.4	1.5
Swale [No Limit]	151,015	181	52	233	1.2	0.3	1.5
West Berkshire [No Limit]	158,465	119	137	256	0.8	0.9	1.6
Adur [No Limit]	64,187	39	66	105	0.6	1.0	1.6
Winchester [No Limit]	125,925	89	120	209	0.7	1.0	1.7
Waverley [No Limit]	126,556	164	49	213	1.3	0.4	1.7
Isle of Wight [No Limit]	142,296	186	54	240	1.3	0.4	1.7
Worthing [No Limit]	110,727	60	127	187	0.5	1.1	1.7
Wealden [No Limit]	162,733	124	161	285	0.8	1.0	1.8
Gravesham [No Limit]	106,890	135	53	188	1.3	0.5	1.8
Basingstoke and Deane [No Limit]	177,760	43	285	328	0.2	1.6	1.8
West Oxfordshire [No Limit]	111,758	106	109	215	0.9	1.0	1.9
Elmbridge [No Limit]	137,215	111	155	266	0.8	1.1	1.9
Surrey Heath [No Limit]	89,204	75	100	175	0.8	1.1	2.0
New Forest [No Limit]	179,649	99	261	360	0.6	1.5	2.0
East Hampshire [No Limit]	123,838	84	176	260	0.7	1.4	2.1
Hart [No Limit]	97,608	138	69	207	1.4	0.7	2.1
Sevenoaks [No Limit]	121,387	158	108	266	1.3	0.9	2.2
Medway [No Limit]	279,142	386	226	612	1.4	0.8	2.2
Vale of White Horse [No Limit]	137,910	249	63	312	1.8	0.5	2.3
Fareham [No Limit]	116,338	147	119	266	1.3	1.0	2.3
Guildford [No Limit]	150,352	143	229	372	1.0	1.5	2.5
Folkestone and Hythe [No Limit]	113,320	219	71	290	1.9	0.6	2.6
Rushmoor [No Limit]	94,387	107	182	289	1.1	1.9	3.1
Chichester [No Limit]	121,508	37	348	385	0.3	2.9	3.2
Eastleigh [No Limit]	135,520	103	350	453	0.8	2.6	3.3
Cherwell [No Limit]	151,846	178	380	558	1.2	2.5	3.7
Tonbridge and Malling [No Limit]	132,571	140	350	490	1.1	2.6	3.7
Buckinghamshire [No Limit]	547,060	335	1,724	2,059	0.6	3.2	3.8
Canterbury [No Limit]	166,762	209	425	634	1.3	2.5	3.8
South Oxfordshire [No Limit]	143,782	417	135	552	2.9	0.9	3.8
Hastings [No Limit]	92,554	53	321	374	0.6	3.5	4.0
Eastbourne [No Limit]	103,324	95	325	420	0.9	3.1	4.1
Windsor and Maidenhead [No Limit]	151,273	144	538	682	1.0	3.6	4.5
Woking [No Limit]	100,008	129	370	499	1.3	3.7	5.0
Reigate and Banstead [No Limit]	149,243	90	693	783	0.6	4.6	5.2
Lewes [No Limit]	103,525	120	495	615	1.2	4.8	5.9
Epsom and Ewell [No Limit]	81,003	32	482	514	0.4	6.0	6.3

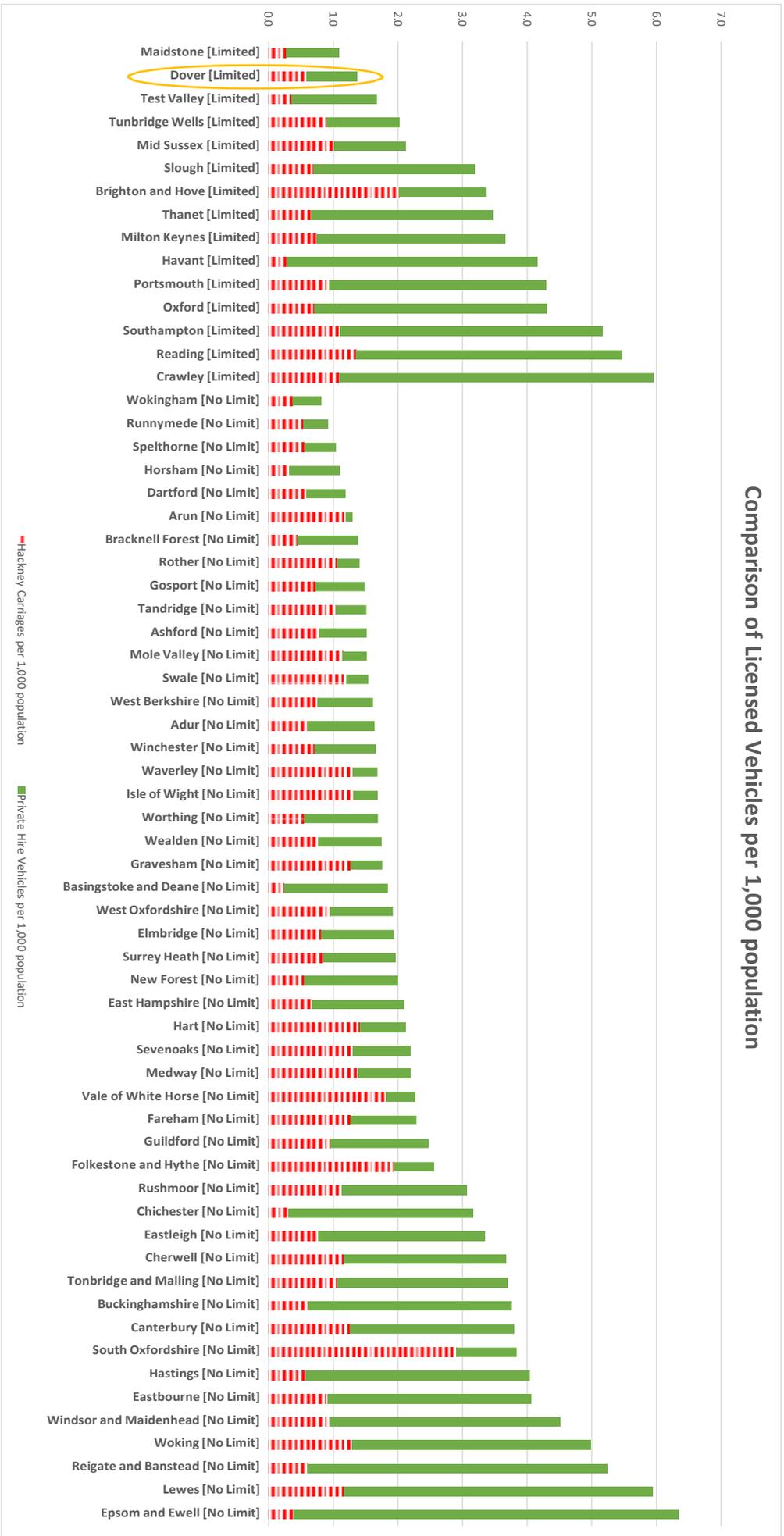


Figure 1 - Comparison of Licensed Vehicles per 1,000 population

Dover Hackney Carriage Unmet Demand Survey

Historic trends

The number of hackney carriages and private hire vehicles licensed in recent years is presented in Table 2. The trend for wheelchair accessible licensed vehicles is presented in Figure 2.

Since 2013, the number of licensed taxis [hackney carriages] has remained constant at 69. The number of private hire vehicles increased from 117 in 2013 to a peak of 139 in 2018. Since 2018, the number of private hire vehicles has dropped to 92.

The number of wheelchair accessible vehicles has generally declined since 2013. Current provision of wheelchair accessible licensed vehicles is less than a third of those available in 2013.

The capacity of the licensed vehicle fleets to cater for passenger demand is dependent on the number of licensed vehicle drivers, as well as the number of licensed vehicles. Since 2013, the number of licensed vehicle drivers increased from 241 to a peak of 307 in 2019. However, since 2019, the number of drivers has dropped to 240.

Table 2 - Historic licensing data (DfT)

Year	Wheelchair accessible taxis	Other taxis	Total taxis	Wheelchair accessible PHVs	Other PHVs	Total PHVs	Total licensed vehicles	Total driver licences issued	Total accessible vehicles	Ratio of drivers to vehicles
2013	10	59	69	16	101	117	186	241	26	1.30
2015	9	60	69	15	111	126	195	278	24	1.43
2017	6	63	69	15	110	125	194	281	21	1.45
2018	4	65	69	19	120	139	208	275	23	1.32
2019	4	65	69	11	122	133	202	307	15	1.52
2020	4	65	69	8	102	110	179	274	12	1.53
2021	5	64	69	8	90	98	167	258	13	1.54
2022	2	67	69	6	86	92	161	240	8	1.49

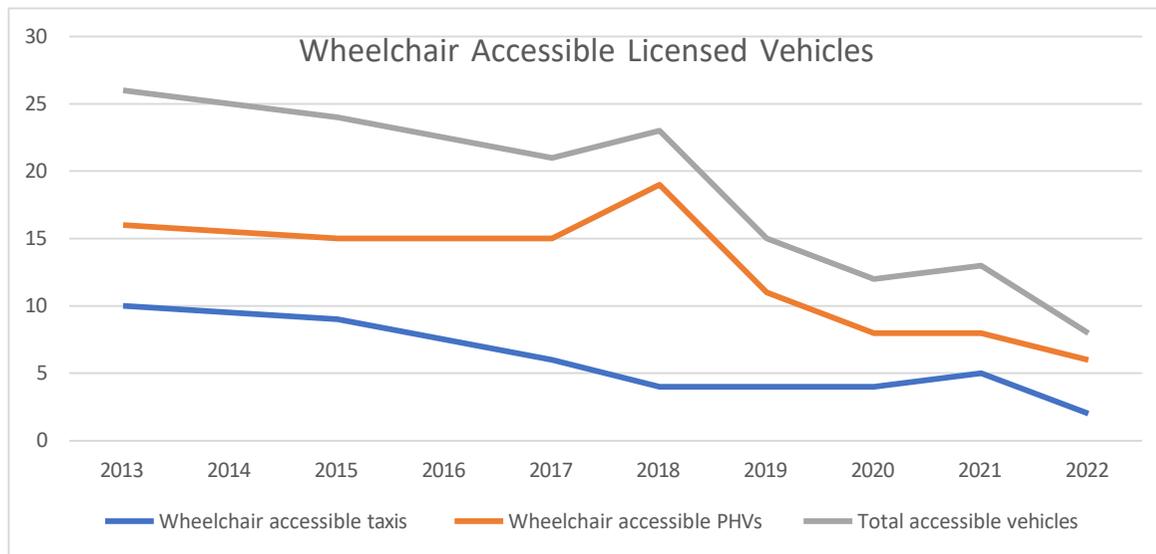


Figure 2 - Wheelchair accessible licensed vehicles

Private Hire and Taxi Monthly magazine publish monthly league tables of the fares in Licensing Authorities in the UK. The Tariff 1 fares for a two mile journey (distance costs only) are compared and ranked. The lower the ranking (number), the more expensive the journey, compared with other authorities. The November 2022 table indicated that the fares in Dover were ranked 213 out of 345 authorities listed. This indicates that taxis in Dover are less expensive than average compared with most authorities.

A comparison of the fares ranking of neighbouring authorities is presented in Table 3

Table 3 - Comparison of Hackney Carriage fares ranks in adjacent authorities

Local Authority	Rank
Folkestone & Hythe	197
Canterbury	73
Dover	213
Thanet	247

3 Patent demand measurement (rank surveys)

The active ranks in the survey area were surveyed to determine whether there was any evidence of patent unmet demand.

Six locations were surveyed. Five of the locations were marked taxi ranks, on the public highway. One of the ranks, at Dover Priory Railway Station, is on railway property and is controlled by the railway operators. Not all Hackney Carriages are permitted to operate from this rank.

In addition to the ranks surveyed, there are also ranks at the Port of Dover ferry terminal and at the cruise terminal. The cruise terminal was active on Thursday 16th June, with a single ship calling at the cruise terminal. No other cruise ships called at the port during the period surveyed. The ferry terminal rank was in operation. The port operators refused permission to survey at the ranks at the ferry terminal or cruise terminal.

The covered by the rank surveys were:

- Fishmongers Lane, Dover
- St James, Dover
- Worthington Street, Dover (Feeder rank to Biggin Street)
- Biggin Street, Dover
- South Street, Deal
- Dover Priory Station

Rank surveys

Surveys were undertaken using video cameras which recorded activity at the ranks from Thursday to the following Sunday morning. Footage was recorded from 07:00 on Thursday 16^h June 2022 to 07:00 on Sunday 19th June.

Overview of observations

During the course of our survey, some 733 vehicles were observed departing the ranks, with passengers. This equates to approximately 11 hires per vehicle (with a fleet size of 69) over the three days of observation. Given that the observation period encompasses the period which is normally expected to be the busiest period of the week, the average hires per vehicle is lower than one would expect, if the Hackney Carriages were solely reliant on rank based hires. It is likely that some vehicles also participate in undertaking pre-booked hires, either as part of a booking circuit, Private Hire or Hackney, or through personal direct hires, by telephone, or indeed, through regular contract hires. In addition, it is acknowledged that some hires are likely to have been undertaken at the ferry terminal, or cruise terminal and not observed during this survey.

During the course of the surveys, 12 passengers were observed, who appeared to have some form of mobility restriction. No passengers were observed who were wheelchair users.

Numerous incidences of passenger waiting were observed. Out of 733 passengers observed using Hackney Carriages, 248 had to wait for a Hackney Carriage to arrive at a rank. This equates to approximately 33.8% of all passengers. The average waiting time for all passengers who had to wait for a Hackney Carriage, was approximately 4 minute and 30 seconds. The average waiting time for all passengers, including those who didn't have to wait, was around 1 minute.

The levels of passenger activity at the ranks were analysed and the graph presented below summarises the profile of activity across all of the ranks.

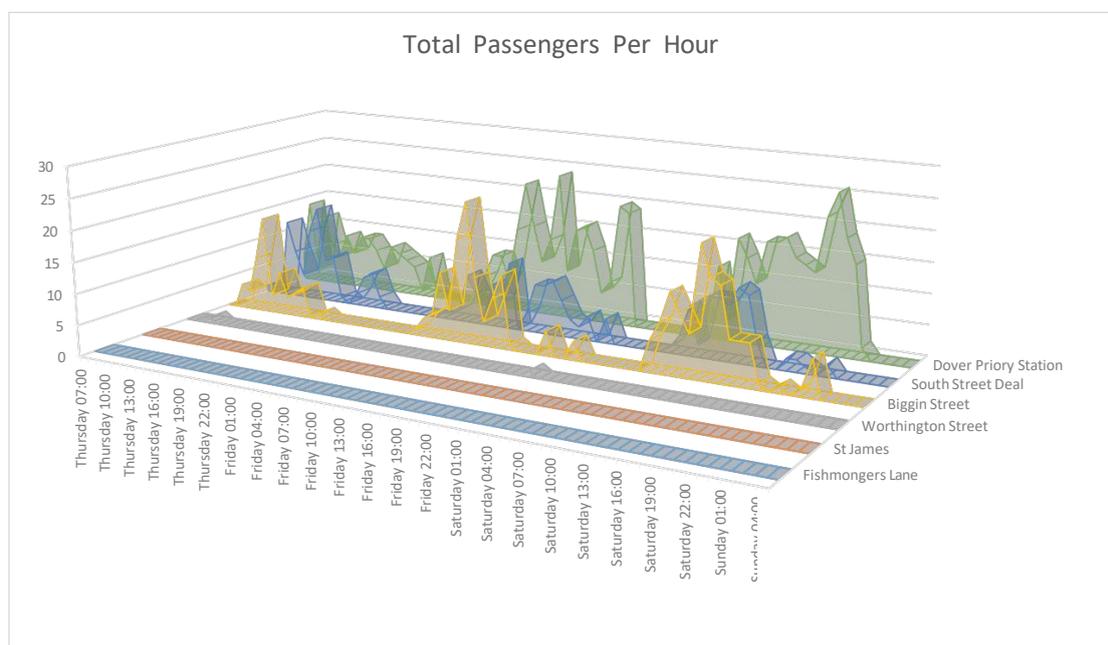


Figure 3 – Observed volumes of passengers through each rank

The ranks at South Street, Deal, Biggin Street, Dover and Dover Priory Station were active from early morning to late evening. The rank at Worthington Street in Dover, effectively acted as a feeder rank for the Biggin Street rank in Dover. Consequently, whilst there were Hackney Carriages passing through this rank throughout each day, most of the Hackney Carriages left empty to move on to Biggin Street.

When we consider the total hires obtained from the rank and aggregate these for all ranks, we can see that the profile of hire volumes does not follow the traditional peak demand on Friday and Saturday nights.

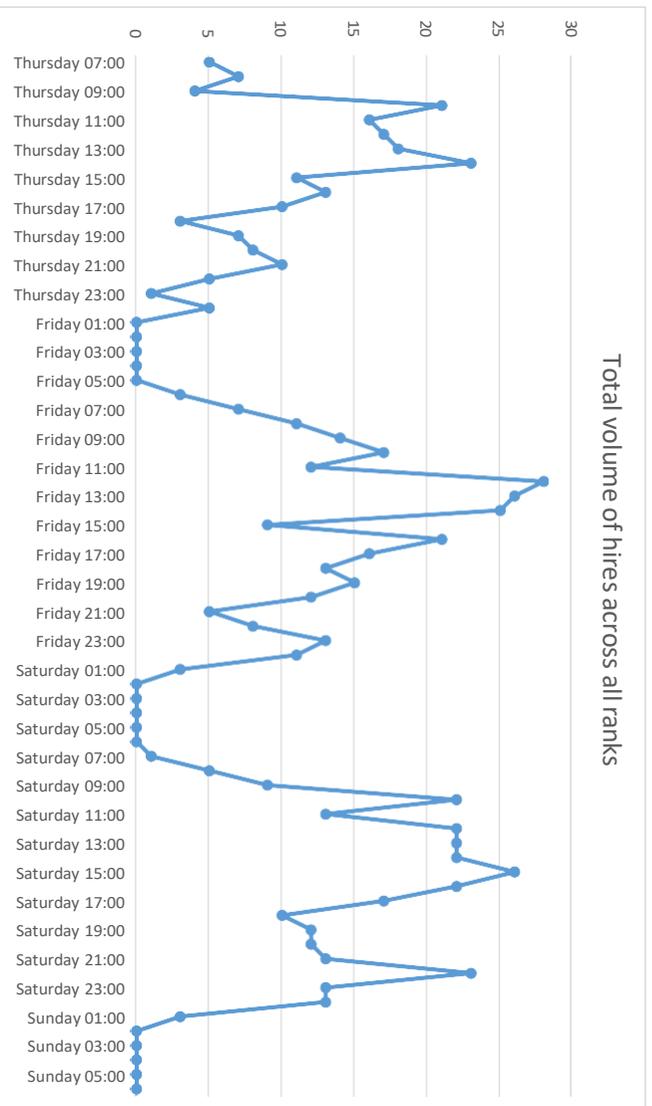


Figure 4 - Total hires per hour in Dover town

Figure 4 illustrates the profile of rank hires in Dover town (aggregated from all town ranks). On each of the survey days, the peak night time hire volume was lower than peak daytime hire volumes.

The profile of hires at the rank on South Street, Deal is presented in

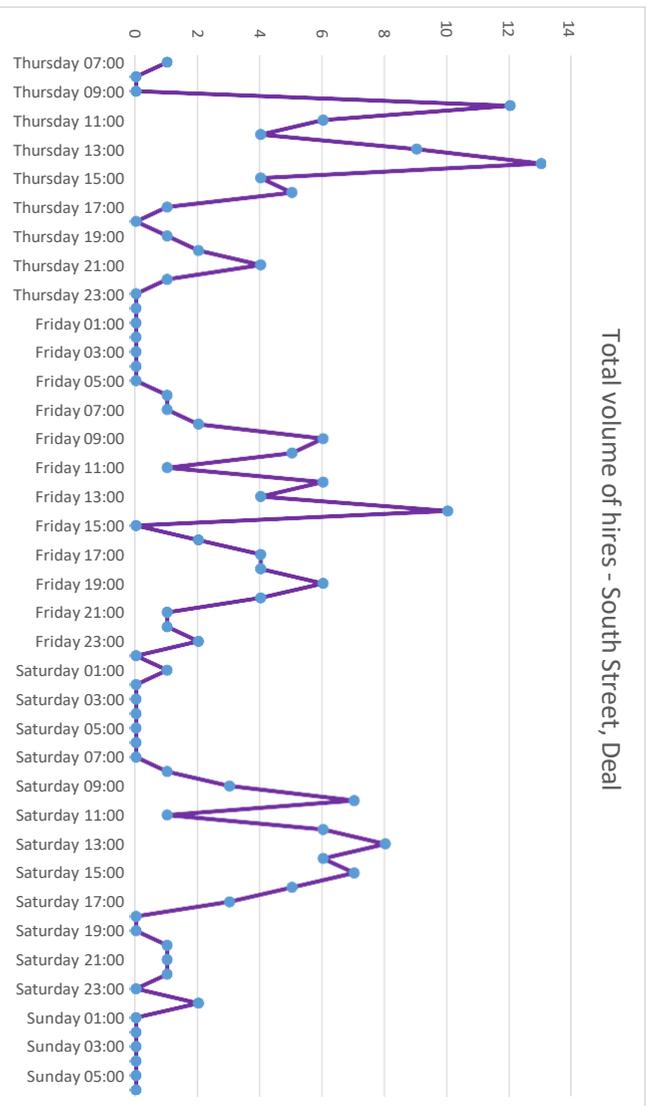


Figure 5. The difference between daytime and night time hires in Deal is even more counter intuitive than those in Dover town. The number of hires on Saturday night was significantly lower than the volume of hires observed on Saturday daytime.

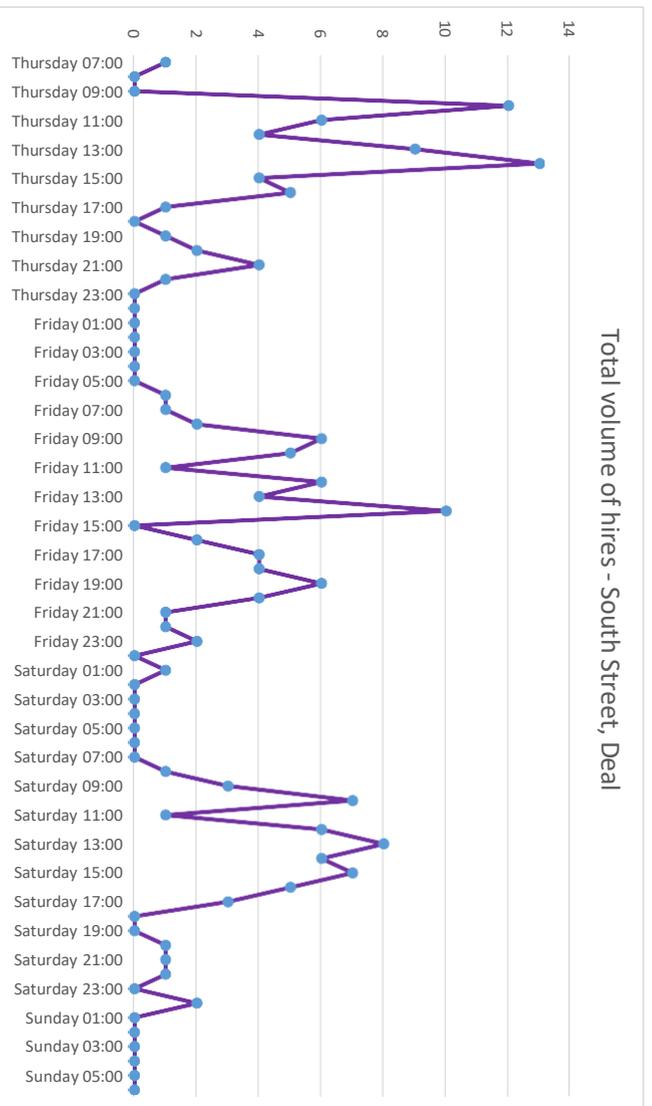


Figure 5 - Hires per hour at the South Street, Deal rank

Hackney Carriage Vehicle Waiting Time at ranks

The time spent by Hackney Carriages waiting at the ranks was recorded.

The average time each vehicle waited at each rank, in each hour, is presented in the following figure:

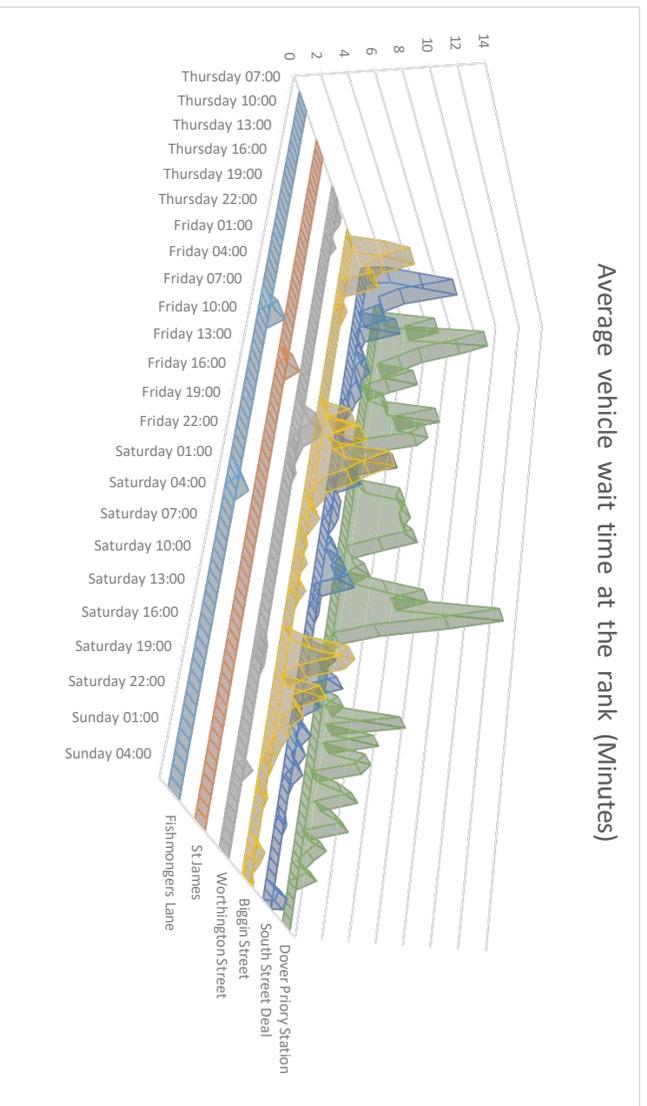


Figure 6 - Hackney Carriages average vehicle wait time (Minutes)

The proportion of Hackney Carriages leaving the ranks empty, varied significantly by rank.

The following proportions of Hackney Carriages leaving the ranks empty were observed:

Table 4 - Proportion of Hackney Carriages leaving ranks empty



Rank	Proportion of Hackney Carriages leaving the rank empty
Fishmongers Lane	100.0%
St James	100.0%
Worthington Street	94.9%
Biggin Street	25.1%
South Street Deal	52.0%
Dover Priory Station	19.0%
All ranks	34.3%

The high proportion of Hackney Carriages leaving the Worthington Street rank empty, relates to its role as a feeder rank for the Biggin Street rank. Including the data from the Worthington Street rank tends to skew the results for all ranks. If we consider all ranks, excluding Worthington Street, the overall proportion of Hackney Carriages leaving the rank empty, was 32.1%.

The reasons for leaving a rank without passengers can vary. Reasons can commonly include, moving to another rank, having waited without obtaining a hire, or leaving to service a booking made by telephone or mobile app. In Dover, a further reason for Hackney Carriages leaving ranks, would be to service the rank at the ferry terminal, when an arriving ferry is due.

The number of empty departures from the ranks in Dover, is indicative of a mixture of reasons, including moving between ranks, servicing bookings and moving to the ferry terminal to service the rank there. Feedback from the trade, together with operator livery displayed on many vehicles, suggests that many Hackney Carriages derive fares from pre-booked hires.

In Deal, the proportion of Hackney Carriages leaving the ranks empty, is high. The potential to move between ranks is more limited in Deal, compared with in Dover. Also, the distance to the ferry terminal in Dover means it is unlikely that drivers based in Deal will travel there on a speculative basis to seek hires. The most probable reason for leaving the rank empty, is to service bookings. This hypothesis is supported by feedback from the trade together with extensive display of liveries on the Hackney Carriages which provide alternative means of booking.

Comparison with the 2017 survey

A hackney carriage unmet demand survey was undertaken in 2017. The total passengers observed during that survey was 1,779. The number of passengers observed dropped to 733 passengers in 2022.

69 passengers were observed waiting for hackney carriages to arrive at the ranks in 2017. The number of waiting passengers rose to 248 in 2022.

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.

Surveys of the public were undertaken by online survey. A total of 190 responses were received.

The results of the surveys are presented in the following tables and analysis. Please note, not all respondents answered all questions. So whilst 190 responses were received, not all respondents answered all questions.

Dover public attitude survey results

89% of respondents had used a hackney carriage or private hire vehicle in the Dover area in the past three months.

Respondents were asked which area, within Dover District, that they most commonly used licensed vehicles. Around 60% of respondents used licensed vehicles in Dover town. Around 18% used licensed vehicles in Deal. The remainder of respondents used licensed vehicles in other parts of Dover District.

The respondents who had used a licensed vehicle in the last three months were asked which type of licensed vehicle they had used for their last trip. 54% had used private hire vehicle. 37% of respondents had used a hackney carriage and 9% could not recall which type of licensed vehicle they had used.

75% of the public could correctly describe the difference between the way in which Hackney Carriage and Private Hire Vehicles may be hired.

The most common ways in which the respondents normally book a hackney carriage are listed in the following table.

How do you normally obtain a hackney carriage within this area?	Proportions
From a rank	27%
Book by telephone	65%
Use a mobile app	8%

Respondents were asked to rate their most recent trip by licensed vehicle in a number of categories including, vehicle quality, driver, price and customer service. 1 being very poor and 5 being very good, average ratings were as follows:

Category	Average rating
Cleanliness of interior	3.93
Cleanliness of exterior	3.97
General condition	3.95
Driver helpfulness	3.82
Driver appearance	3.76

Respondents were asked how much was the fare for their last trip in a licensed vehicle. Responses were grouped into ranges and the proportions for each range were as follows:

Fare range	Proportion of respondents
Up to £5	14%
From £5.01 to £10.00	57%
From £10.01 to £15.00	17%
From £15.01 to £20.00	2%
From £20.01 to £30.00	5%
From £30.01 to £50.00	0%
From £50.01 to £100.00	2%
More than £100	3%

The average fare paid was £12.66

Respondents were asked how frequently they travel by hackney carriage, as opposed to private hire vehicles in Dover District.

Responses were as follows:

Frequency of hackney carriage use	Proportion of responses
Never	13%
Less than once a month	38%
Once per month	0%
A few times a month	37%
Once a week	6%
Almost daily	6%

Respondents were asked how they felt about the number of hackney carriages in Dover District.

Views regarding the number of hackney carriages	Proportion of responses
No opinion	13%
Not enough	66%
About the right number	16%
Too many	5%

Respondents were asked if they would like to see any improvements to hackney carriage services. The most common response was regarding availability of hackney carriages. These responses related to availability at weekends and evenings, availability of accessible taxis, availability in rural areas and willingness to take passengers from Dover to rural locations.

In addition, the following responses were received, in descending order of popularity:

- More ranks in central area of Dover
- Cheaper fares

The following individual responses were also received.

- All taxis to be hackney's no private hire
- Stop them all driving for the just eat/uber delivery companies. Taxi should be used for the carriage of people not food. Impossible to get a cab in the evenings as they are all delivering food for Â£50 an hour. one of the worse towns for Taxi service I've been two.
- More licenced drivers
- Cleaner seats
- Make hailing signs bigger so we can see and increase public awareness
- electric cars
- DBs checks and vehicle maintenance better
- Clearer Ranks

Respondents were asked if they had experienced any problems with the local hackney carriage service. Some respondents indicated multiple problems. The problems identified, in decreasing order of frequency were as follows:

- Delay in getting a taxi
- Position of ranks
- Cleanliness
- Driver issues
- Design of vehicles
- Price

If respondents had indicated that they had experienced problems, they were asked to provide further details. The following responses are representative of the comments received:

- Our taxi driver charged what was on the meter but stopped his mobile app and cleared while driving some time before he dropped us off. So if he makes £1.20 onto of every cleared job a night he's making a good little side profit
- To many private cars on the ranks the taxis can't get on them and will drive past to sit else where.
- You can never get a taxi at night they will not pull off the station rank
- It's always a struggle trying to get a taxi lately. I most often need it to or from Dover Priory. Often the rank is empty or it's a race for the only one. Last time I wanted taxi from town centre all ranks where empty there as well.
- Any Friday or Saturday night is literally impossible to get a taxi. Biggin Street rank in the town centre is always empty, not a single Hackney carriage in sight. Phoning for one normally results in being told there are none available.
- At Dover priory, 4pm, 6pm, 8pm on weekdays, never any there
- There are just hardly any private hire vehicles available at any time of day - booking is also near impossible as many won't pre book or if they do they don't accurately record the booking so claim they never received it
- Struggle to get a taxi in the evening
- Can never seem to get one
- Not enough taxis available
- I don't like the way they chat away on their phone in a foreign language, it's very rude and that shows they are not paying due attention to the road. Its actually intimidating for my Girlfriend when she walks to get a cab at Dover Priory and they are all chatting away in their native tongue and all stare at her.
- Trying to book a taxi for 4am to get me to work is sometimes impossible
- The rank outside of Boots in Dover making it difficult for large vehicles to get out of Worthington Street
- 2 ranks in Dover. One at train station - nearly always empty and very rude staff whom refuse payment by card despite having card machines. The other isn't far from this one. Always empty any time of day.
- No hackneys at night, and couldn't get a private taxi. Had to walk home on my own
- None available, several hours wait time, generally late and have to phone again to chase
- There are not enough cars to keep up with the demand

- Next to no taxis available on Friday or Saturday nights, always told 2 or 3 hour wait so I walk home in the dark alone
- Complete lack of drivers and cars!
- There needs to be more ranks
- You can't get one! I was told they are doing just eat.
- Driver quite rude asking if he could turn music down, when coming home from blue birds and the vehicle needs body work and engine sounds needing a check
- Not enough taxis to service the area
- Taxi cancelled twice
- No taxis around in the evening about 9pm
- Many drivers use their mobiles or are on the phone when driving. There is a constant shortage of drivers and they are not disabled user friendly.

Respondents were asked for factors which could encourage them to use hackney carriages or to use hackney carriages more often. Those respondents who answered this question generally indicated multiple features.

Better vehicles	9%
Better drivers	12%
Better located ranks	30%
More hackney carriages I could phone for	41%
More hackney carriages I could hail or get at a rank	43%
Cheaper	6%

Do you consider you, or anyone you know, to have a disability that means you need an adapted vehicle? (Not necessarily a licensed vehicle)

Yes. Someone I know needs a wheelchair accessible vehicle	9%
Yes. Someone I know needs an adapted vehicle but not a wheelchair accessible vehicle	4%
Yes. I need a wheelchair accessible vehicle	3%
Yes. I need an adapted vehicle but not a wheelchair accessible vehicle	4%

If you arrived at a rank and there were saloon and wheelchair accessible vehicles there, which vehicle would you choose?

The first one available	70%
A saloon car	20%
A wheelchair accessible vehicle	6%
No response	4%

Respondents were asked to provide a reason for their response to the previous question.

Those who selected a saloon car provided the following reasons:

- Don't need the extra space, bigger car bigger fare
- Would leave the wheelchair vehicle for someone that needs it
- Convenience

Those who selected wheelchair accessible vehicle provided the following reasons:

- Buggy friendly
- I have a fold up mobility scooter bigger boot
- More flexibility
- More space for the chair and mobility equipment

Some of the respondents who selected the 'first available vehicle' provided some additional reasoning as follows:

- You will find if you try to take a taxi that is not at front of the rank will cause arguments
- Not wanting to take a disability vehicle in case someone else needed it
- Any vehicle is fine with me
- You have to take the 1st available 1 as the driver points you to the 1st cab
- No reason
- Any it makes no difference as long as one is there!

Are there any locations where you would like to see new taxi ranks?

No	19%
Yes	41%
Don't know / no opinion	35%

Suggestions for new ranks (excluding suggestions for existing ranks), in descending order of popularity, were as follows:

- Market Square, Dover
- Seafront, Dover
- Pencester Road, Dover
- Supermarkets

- Deal Station
- Deal town centre
- Deal seafront
- Buckland Avenue
- Walmer train station
- Park Street, Deal
- Whitfield
- Hospital
- Tower Hamlets, Dover
- Folkestone Road, Dover
- Linces, Dover
- Cherry Tree Avenue, Dover

How would you rate the level of service provided by Hackney Carriages in Dover District? Please rate from 1 to 5. (1 being very poor and 5 being very good). The average rating was 3.06.

Which features would do most to improve ranks in Dover District?
Responses in descending order of popularity were:

- Improved signage
- Shelters
- Seating
- Lighting
- Improved signage to discourage vehicles parking on ranks

40.8% of respondents indicated that they had given up waiting for a Hackney Carriage at a rank, or by hailing.

31.6% of respondents said they had not been able to hire a hackney carriage within a reasonable time, when telephoning for one.

The percentage of respondents who had given up waiting for a Hackney Carriage at a rank or by hailing is used as an indication of the level of latent unmet demand.

What would you say is the principal factor which limits your use of Hackney Carriages (e.g. use a car, or prefer to use buses, rarely go out at night etc.)

Lack of availability was the principal reason offered by the majority of respondents who provided feedback on this question. The next most common reason was that the respondent had a car available. The remaining two reasons given were that disabled respondents couldn't rely on finding a suitable licensed vehicle and price was an issue.

Would you welcome the provision of taxi marshals at ranks?

Yes	13%
No	19%
No opinion / no response	68%

Thinking back to times prior to the spread of Covid-19 and comparing your use of licensed vehicles at that time, do you feel that your use of licensed vehicles now is different to the level of use prior to Covid-19?

I use licensed vehicles less now, compared with prior to Covid-19	22%
No difference	58%
I use licensed vehicles more now, compared with prior to Covid-19	17%

Those who felt that their level of use of licensed vehicles had changed, were asked to expand on why their level of use had changed. The reasons given by those who used licensed vehicles less were dominated by statements indicating that availability of licensed vehicles was much lower now than prior to Covid-19. Other reasons given were:

- Concerns over cleanliness
- Don't go out as much
- Now use a different mode of transport

Those who indicated that they used licensed vehicles more now, compared with prior to Covid-19, gave the following reasons:

- Distrust other public transport as people don't wear face masks
- Health has deteriorated
- Moved house

Do you have regular access to a car?

Yes	65%
No	32%

Are you a student or permanent resident in Dover District?

Yes, permanent resident	91%
Yes, student	2%
No, neither of the above	4%

What gender are you?

Male	40%
Female	57%
Prefer not to say	1%

Which of the following age groups do you fall into?

16 - 30 years old	9%
31 - 55 years old	52%
Over 55 years old (56+)	37%

Other comments from the public were:

One particular driver in Dover has always given superb service and that is Richards Taxi.

Never enough hackney carriages wish it was more like Folkestone

More drivers, cheaper or get uber

It's off-putting when you see drivers smoking in the vehicle when on the rank or when driving around empty. Thought taxis were a no smoking environment yet the drivers flout this rule.

There is only one single reliable taxi firm of any kind in the Dover district. That company is St Margaret's village cars. The ONLY company that is reliable in the area. Bring Uber to Dover and we might have a chance to get home

Would be cool to have a central app or phone service to book taxis from instead of calling ten different companies every time. Also I hate how unreliable getting taxi from train station is.

When cruise ships are in,. local residents can forget getting a taxi. None of the taxis in Dover are interested because of the money they make from the ships and that, to me, is not right

We need more competition in Dover and more private hire vehicles available at all times of day. Everyone seems to think they have either just given up after Covid or they are now doing Deliveroo and Just Eat deliveries etc.

We are very fortunate in Sandwich the local firm, Sandwich Cars, always go over and beyond for their clients.

Keep the price low. Lower fuel for the taxi means lower cost of the end user.

Bring Uber into the district

Given the crime rates in Dover, taxis should be more readily available & able to book in advance

Did not know Dover had a Hackney Carriage service. Private hire very hard to get of an evening of night.

We need a lot more private drivers. Since covid there has been a shortage which makes it hard to just ring for taxi when shopping finished. Sometimes wait is half hour

Extremely poor service in Dover and Deal.

Evenings tend to be worse.

Increased cost is off putting as getting very expensive now.

Rudeness from drivers refusing payment by card although they have card machines. I was told by one it is because they then have the money in their pocket.

The town businesses will not thrive if people of an age with disposable income cannot use taxis to get to restaurants and bars. No town is safe to walk through at night so if no cabs, no one goes to the town

Make more hackney plates available, make them at a more affordable cost, one company particularly have cars that are very dirty inside and out. Also The same company have drivers and even the owner smoking in their car (not very nice when you wish to put a baby in the car).

Absolute shortage of taxis in Dover. Not just Hackney carriages.

Bring on Uber.

Taxis were always very clean inside and out but not any more and smart attire but not any more.

Trying to get a private hire to pick up from home can be difficult and you can't get a hackney taxi to pick up from home. Also do not go into town as much as cannot guarantee to be able to get a taxi to get home.

Taxis should all be booked through one system for all companies

Not enough taxi availability at night in Deal and they don't always travel outside of Deal.

DDC should be investing in a better bus service not increasing the number of taxis.

Try it yourself ! Phone for a cab Friday Saturday night . Go into town and see if you can get home by a real taxi. I bet you can't! I was embarrassed to be a Shark, when a whole family couldn't get a cab from the train station to the cruise boat and had to walk with all their luggage.

*What a s**t taste of Dover they got having to walk by the wreck of JG's Banksy building and dirty York Street . With the burnt out night club then tackle the A20. The cruise boats won't last long if that's how their passengers are treated. I'd be embarrassed to be running this town!*

Drivers need DBS checks

I have been in a couple of private hire vehicles where the seat belts in the rear of the vehicle didn't clip properly. Once you are in the taxi booked for an event, it's too late to rebook a taxi. Not sure if there is any legislation on this.

We need more taxis.

With the proposed reduction in rural bus services, the ability to be able to use any type of taxi could be crucial.

Deal has one very good private hire in Direct Cars, the others not so as have a lot less availability. There are no Hackney cars and no Uber. We are so very much behind the times

No wheelchairs taxis in deal at the weekends I am housebound otherwise.

Comments on public attitude survey results

The proportion of consultees who identified non-valid means of hiring a Private Hire Vehicle was relatively low in Dover. Both Hackney Carriages and Private Hire Vehicles are generally perceived as good quality. Driver quality was generally considered to be good or very good by the majority of respondents. Customer service is seen as good.

Telephone booking is a popular means of hiring both Private Hire Vehicles and Hackney Carriages.

Comments and responses were dominated by feedback indicating discontent with the level of availability of licensed vehicles. In particular, lack of availability at night was identified as a particular issue.

5 Key stakeholder consultation

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

- Supermarkets
- Hotels
- 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 stakeholders. 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 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.

Supermarkets

Feedback from supermarkets indicated that customers who used licensed vehicles made their own arrangements. None of the representatives contacted were aware of any notable issues with the availability of licensed vehicles for customers.

Hotels

Hotels and guest houses were contacted by telephone. Generally, hotels rarely got involved with booking a licensed vehicle for guests. Some of the hotel representatives indicated that, based on feedback from some guests, availability of licensed vehicles during 'school run' times in the mornings and afternoons could be limited and lead to extended wait times. Other than during those periods, they were not aware of any particular issues.

Pubs and Clubs

Some licensed premises in Dover town indicated that there were frequently issues with availability of taxis at night. As far as they were aware, most people tried to book a licensed vehicle by phone or app. However, many people appeared to make arrangements to be picked up by private vehicles (not licensed vehicles) or walked home. Much of the feedback was anecdotal as the respondents were generally only aware of the immediate vicinity of the premises.

In Deal, licensed premises indicated that as far as they were aware, most people, if using a licensed vehicle, would pre-book in advance. There was some perception that availability was limited late at night.

In other areas around Dover District, feedback varied. It was felt by some that few people arrived or left by licensed vehicle. Others felt that customers who used licensed vehicles appeared to have booked in advance for the return journey, anticipating a particular time for their return journey.

Railway station (Dover)

In Dover, at the railway station, staff indicated that there were always taxis at the ranks during times when trains were running. Some people came from outside the station to use the taxis at the ranks. When trains arrived, sometimes a queue of passengers could form at the rank. However, hackney carriages generally came to the rank within a few minutes.

Other Council contacts

No feedback received.

Councillors, parish councils and town councils

All councillors and parish and town councils were contacted to seek any views on licensed vehicle services. Some responses were received. Some concern was expressed that rural bus services were experiencing cuts and the role of licensed vehicles was likely to become more crucial as a mode of transport in rural areas, in order to compensate for lack of bus availability.

A comment was received regarding Deal and Walmer areas. "There are significant challenges finding available cars at weekends and in the evenings, with many firms requiring pre booking a day or more in advance. It is almost impossible to call for a cab to request an ASAP collection at these times, and firms will often refuse bookings that will take them too far 'out of area'. This situation has existed for some years, but has noticeably worsened as a result of the COVID-19 pandemic."

“Re taxis in Deal. I have had complaints from a local disability support group that there is very poor provision of taxis suitable for people in wheelchairs and power chairs. There seems to be only one working in Deal and this is sometimes unavailable, so people cannot get to medical appointments.”

Further comments corroborated the indications that the number of wheelchair accessible vehicles in operation has reduced recently and that some companies, which previously offered wheelchair accessible vehicles, no longer offer this option. The issues with lack of availability appear to be most noticeable in areas outside Dover town.

Disability representatives

Some disabled representatives, independent living facilities and care homes were consulted.

The availability of licensed vehicles in general, in rural areas, seems to have been reduced, compared with pre-Covid times. In particular, the availability of wheelchair accessible vehicles has reduced. Some of the providers regularly used in the past by wheelchair bound users, no longer operate wheelchair accessible vehicles.

Some elderly, or disabled people rely heavily on licensed vehicles to travel for appointments and leisure trips, as they are not able to drive themselves, for a variety of reasons. In order to reduce stress and anxiety relating to availability of suitable vehicles for travel, most users prefer to pre-book travel in advance. Some providers are able to accept bookings days in advance, others cannot accept bookings other than for later the same day. For some appointments for specific times, such as doctor's or dentist appointments, uncertainty over whether a trip by licensed vehicle can be booked to arrive on time, is a source of anxiety. Examples were provided of appointments which have been missed, owing to inability to book a licensed vehicle on the same day. Similarly, examples were provided for doctors appointments that had to be cancelled (having booked the appointments several weeks in advance), owing to non-availability of licensed vehicles for pre-booking before the day of travel. These concerns exist amongst mobility impaired travellers, who are able to use saloon car licensed vehicles, as well as those who need to use wheelchair accessible licensed vehicles.

For users who use wheelchairs, including those who cannot readily transfer from the wheelchair to the licensed vehicle, the issues are often more significant. Examples were provided where users in wheelchairs were not able to pre-book a wheelchair accessible vehicle for appointments.

Cuts in bus services, cuts in available hospital transport services and reduced availability / longer wait times for ambulances have all been

perceived as factors which exacerbate the problems associated with reduced availability of wheelchair accessible licensed vehicles.

An example was provided from a wheelchair user, who was feeling unwell on a Sunday afternoon. The wheelchair user called NHS 111 with symptoms and was advised to get to hospital. The wheelchair users tried calling licensed vehicle providers in Deal, attempting to hire a wheelchair accessible vehicle to travel to the nearest hospital in Deal. No wheelchair accessible vehicles were available before 11.00 pm that night. No hospital transport would be available until the next day. So an ambulance had to be called. The wheelchair user was admitted to hospital and advised that they may not have survived if they had waited until 11.00 pm. It was felt that the stress of seeking and failing to find available transport to get to hospital may have exacerbated the condition. It was felt that if more wheelchair accessible licensed vehicles were readily available for immediate hire, this would have reduced stress on the wheelchair user and reduced pressure on the ambulance service.

Feedback provided examples of other issues experienced with wheelchair accessible vehicles. Some wheelchair users have motorised wheelchairs. These wheelchairs are made in a variety of sizes and some are significantly heavier than self-propelled wheelchairs or those pushed by an assistant. The heavier wheelchairs may require a larger wheelchair accessible vehicle. However, the high floor height of some of these vehicles means that the gradient of the loading ramp is steep and cannot be used by some wheelchairs.

Some powered wheelchairs are also collapsible, enabling them to be carried in standard saloon cars, if the wheelchair user can transfer into the vehicle. However, even collapsible wheelchairs are heavy and not all drivers may feel able to lift the wheelchair into the vehicle.

Comments on Stakeholder Consultation

Some of the stakeholders who provided feedback had no direct awareness of any issues with licensed vehicle availability. However, others provided feedback which indicated that licensed vehicles in general and wheelchair accessible licensed vehicles in particular offered limited availability at times and in some locations.

Lack of availability of licensed vehicles was the dominant element of feedback from stakeholders who provided a response.

No comments on the quality of vehicles or drivers were received.

6 Trade 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.

An online questionnaire was hosted and links to the online questionnaire sent to licensed vehicle owners and drivers. Eighteen responses were received.

In addition to the direct consultation questionnaire, telephone consultation was undertaken with some booking office operators.

Online survey responses

Of those responding, 72% said they normally drove Hackney Carriage vehicle.

In terms of typical hours worked, the respondents were asked how many hours they typically worked during daytime hours (06:00 to 18:00) and night time (18:00 to 06:00). The majority of respondents worked the majority of their working hours, during the day time. Few of the respondents worked night time hours, including not working on Friday and Saturday nights. The average hours per week worked was around 55 hours.

Respondents were asked which ranks they worked from (if they drove a hackney carriage). The majority of respondents indicated that they worked from the main ranks in Dover, Biggin Street, Worthington Street, Railway Station and Port of Dover. Around a quarter of hackney carriage driver respondents operated from the rank on South Street, Deal. None of the drivers who operated in Deal, indicated that they worked from any of the ranks in Dover. Similarly, none of the drivers who worked in Dover, operated from the rank in Deal. Two drivers indicated that they also operated from Pencester Road in Dover. Not all hackney carriage drivers indicated that they worked from ranks, some indicated that they normally only undertook pre-booked hires or contract hires.

All of the hackney carriage driver respondents indicated they pick up journeys from ranks. The average number of hires from ranks per week day varied significantly, from 11 hires per week to over 100 hires per week. The average number of rank hires was around 52 hires per week.

Most of the hackney carriage driver respondents indicated that they normally pick up fewer than 10 hires per week from hailing or flagging down at the roadside. Some drivers indicated that they picked up between 11 and 20 hires per week from hailing.

Most of the hackney carriage driver respondents indicated that they owned their own vehicles.

Respondents were asked how many journeys they pick on average each week, from telephone bookings. All hackney carriage drivers and all private hire vehicle drivers indicated that they undertake some hires obtained through telephone bookings

Approximately how many journeys on average do you pick up each WEEK from telephone bookings?	Up to 10	11 to 20	21 to 30	31 to 40	51 to 60	61 to 70	71 to 80	111 to 120	141 to 150	201 or more
Hackney carriage drivers	55%	0%	9%	9%	9%	9%	9%	8%	8%	0%
Private hire vehicle drivers	0%	50%	0%	0%	50%	0%	0%	0%	0%	33%

Amongst the hackney carriage drivers responding, those who undertook higher volumes of pre-booked hires, tended to undertake fewer, or no rank based hires.

Around three quarters of driver respondents indicated that they generally didn't undertake any hires which involved the carriage of wheelchairs. The remaining quarter indicated that they normally undertook up to 5 hires per week, which involved the carriage of a wheelchair. Hires which required carriage of a wheelchair were split evenly between rank hires and prebooked hires, for hackney carriages. Around half of those respondents who regularly undertook wheelchair user hires, had regular clients who were wheelchair users.

Around 44% of respondents had regular clients with some form of mobility impairment.

Some of the hackney carriage drivers are members of a WhatsApp social media group. This is used to inform drivers if people are waiting at a particular rank or if a special vehicle is required at a rank.

Around a third of respondents indicated that their vehicle was driven by more than one person, for different shifts.

Issues highlighted which could adversely affect the successful operation of the Hackney Carriage trade included the following comments:

- Totally different rules to other local councils on how long we can keep a car as a taxi. Totally non level playing field as our overheads far outweigh other firms in neighbouring areas i.e. Thanet where some of their vehicles are 15+ years old.. We therefore are undercut on airport runs & school contracts etc.
- Private hires taking rank customers

- Private vehicles parking on the Taxi rank and abusing us when we politely ask them to move. Often, we cannot wait for hires as the rank is taken by private drivers.
- Drunk and disorderly people
- If the amount of hackney plates available are increased as it's only for a few months of the year and then it's difficult to make a living
- More Drivers will solve the issues, with that said, It's a supply and Demand issue, prices need to increase to meet demand. Also after 8pm, we should operate on time and Half, as most drivers will only work during the day and they don't need to come out at night and deal with drunks, etc. if they're not incentivised to do so!
- Also, for a 3-year period, reduce the age Limit on the age of Cars, Reduce regulation and allow people with driving licenses to drive a taxi.
- Public not understanding difference between hackney and private hire
- Technology
- Traffic gridlock in Dover
- Vehicles parking on the Taxi Ranks and Ranks being moved to places where no public can see them (I.e Market Sq) and St James Rank not in the right place as it was promised
- Rail strikes, port issues leading to gridlock of Dover's roads

Respondents were asked if the supply of Hackney Carriages was adequate to meet the needs of the public. Around two thirds responded with 'yes'. Similarly, they were asked if the Private Hire Vehicle supply was adequate. Around a quarter of respondents responded with 'yes'.

Respondents were asked about the impact of a hypothetical situation, what would be the impact of increasing the number of Hackney Carriage vehicle licences in Dover. Responses included the following statements:

- Private hire vehicle would leave company [to be licensed as a hackney carriage] & sit on ranks. Then when people phone the company, they would not get a service. We only have 6 good spaces in town so you would not get on a rank
- We would need more taxi ranks in Deal
- Maybe more availability at weekends when hackney drivers are also part of a busy office
- They would be taken up by current Private Hire licensed vehicles, and would not increase the number of licensed vehicles in the area.
- It is hard enough trying to earn a living in this current time, it would probably make it harder, which is why most of us have clients who phone for a Taxi. Especially useful when you cannot get on the rank due to the amount of times it is used by members of the public to park.

- Less work for the ones already working, there is not enough jobs for all of us already.
- In Deal we only have one main rank that everyone uses so at certain times would be inadequate to increase number of hackney plates since COVID there is a shortage of drivers at weekends so the rank is under-serviced.
- More time waiting for my next job, sometimes hours sitting at present.
- Should all be Hackney carriages so the fares will all be the same.
- Not enough work for us.
- More pre bookings would be "stolen".
- There is very little work between September and April. We struggle enough as it is.in the winter months we sometimes make £30 per day after fuel and expenses.
- There will be no impact due to it being a driver shortage, Drivers are leaving for better paid Jobs, PRICES NEED TO INCREASE DRAMATICALLY TO MEET WITH DEMAND.
- No space on the ranks.
- Less work for current owners
- To many taxis for the ranks that work in Dover.
- Even worse private hire supply

Respondents were asked about the impact of a hypothetical situation if some hackney carriage licences were surrendered in Dover and not renewed. Responses included the following statements:

- There is a shortage of taxi drivers and people struggle to get taxis on weekends as it is. I think reducing the hackneys would only make this problem worse.
- If you take away the Hackney drivers then you would not only jeopardise jobs but also the availability of jumping in a car on the rank ,forcing people to wait for a private hire car to turn up , which is just not viable and people prefer an immediate taxi rather than waiting. I've been both private hire and hackney over the years and people would miss the Hackneys because on the rank they are immediate, and a lot of local shoppers like the taxis being on the rank. Plus tourists look to the rank for a taxi as they don't have local taxi phone numbers.
- Will be even less on the road
- Still be okay
- More pre books would be taken
- More deterioration in this depleting industry, due to over-regulation regarding price and entry barrier and the Time it takes to obtain a license.

Respondents were asked are there any factors which limit the supply of hackney carriages or private hire vehicles at certain times or in certain locations? Responses included the following statements:

- Driver are not safe at night & ranks are too small or in the wrong place
- Working as a female driver I have recently taken the decision not to work at night due to the fact I don't feel safe and there is not enough in place to protect us when incidents occur. For example, when previous incidents have been reported they aren't taken seriously and no further action is taken, meaning these customers get away with it and will be likely to repeat their actions again. I have been touched inappropriately, had inappropriate comments made to me, been threatened with physical violence, unpaid fares, been spat at, had customers try and use drugs in the back of the car and made to feel generally uncomfortable by the customers. Although a small amount of this is to be expected its becoming more and more regular, happening multiple times through the night.
- The sheer lack of drivers means that most taxis are run by one person, and for their own safety they can only drive for so many hours a day. The bulk of the work is during the day, so we have a severe lack of drivers for evening, night and weekend shifts.
- The rank by St James is in the wrong place. People do not want to walk to the top of St James with heavy shopping. I have sat down there for up to 2 hours before without a job. No fare, no money. Since it has been there, I have had 1 job and it's wasting time with no earnings to sit there. The one at fishmongers is only useful at night when people are out. Pencester is dead, it is right opposite a private hire firm which people tend to use more. The docks have been deadly these last 2.5 years as bus firms had the contract to pick up crew due to Covid and there were no foot passengers again due to Covid. It's only just beginning to pick up now. Most jobs come from Biggin St or Worthington St, although there we have trouble getting on the rank at times as everyone else parks their car or van there for coffee, shopping or deliveries. If you check the footage from the cameras that were up, you will see it is a constant battle (often abusive to us) when we ask them to move so we can work.
- The low fares, the fact that Tuesdays and Wednesdays are usually dead for the trade, and people not using taxis as they used to. They call Private hire companies, and when they can't supply the cars in time the put us all in the same pot saying there's not enough taxis in Dover.
- No major factors, more space on ranks in Worthington St would be good as when rank if full we have to drive round in circles for half an hour or wait for a space on double yellow lines
- Late at night less cars out now and what there used to be
- Safe spaces for private hire vehicles to pull into to drop passengers off as they are not allowed to stop in Hackney bays

- Rank space definitely, as there is nowhere to queue while waiting for a space on a rank if they are full, without getting a parking fine and also when Dover gets gridlocked due to port congestion which is now far too often.
- Security is a concern, especially late at night, also the unsociable hours, why work at night when you can earn as much during the day? Allow the Tariff to increase after 8 pm this will Help this.
- Rank space. no drivers for nights
- Not enough drivers
- Traffic gridlock in Dover
- Security or safety concerns when asking people to move of ranks who should not be parked there. We get sworn at. Some taxis go on School jobs so at those times [there is low availability] and Council not giving us the fare increase quickly, so Private hire are changing more than hackneys.

Respondents were asked if any ranks need to be improved and if so, how. The responses included the following comments:

- Maybe more signage?
- We have our main rank in South Street Deal, which has in recent years been updated. During the consultation period, we all expressed [concern regarding] the ridiculousness of the design. Deal hackney vehicles are for the main part attached to a company running both tiers of licensed vehicles and are given work from their respective offices. Consequently, big gaps must be left on the rank between cars, to allow them to drive over the raised Kerbs to answer an office call when sat on the rank.
- Yes, cameras on the ranks to protect us. Also, immediate fines issued to any non hackney vehicle that parks there. A longer rank would be good in the high traffic shopping areas. A taxi rank inside St James would make it easier for shoppers to use us. Likewise a rank close to the Market Square that is visible, rather than hidden around a corner, perhaps behind the new bus stop as it makes it easier for people to find us.
- Outside Costa coffee, needs moving to the other end outside boots
- Yes, put cameras on it.
- Biggin street could be bigger as it only takes 3 cars and nowhere to queue while waiting for a rank space.
- South Street. Kerb too high on passenger [side,] making it difficult to exit top half of the rank
- Biggin Street rank could be bigger
- YES, all off them in Dover Town ie Market Sq back in the Sqare. Biggin St should be in the Precinct outside B&M, so people can get in the taxis more safely and St James outside M&S as promised.
- Better signage & `policing`.

Respondents were asked if any new ranks need to be established? If so, where should they be located and why?. Responses included the following statements:

- The White cliffs and Dover Castle
- Deal Station.
- St James, Dover

Respondents were asked if they were aware of any times or locations where members of the public may face difficulties hiring a Hackney Carriage? Responses included the following statements:

- School run time
- Friday and Saturday nights, 10pm onwards
- Every night and most of the whole weekend. During the school term, before school and when school finishes are also testing times.
- Yes, St James, The market and at school times many of the ranks are busy so Hackneys are coming and going.
- Market square and Bigging Street at 2.30 am on Friday and Saturday. Can't be helped, nobody wants to deal with drunk people who probably can't afford the fare at 2.30 am.
- Mainly weekends and during school term.
- During the gridlock shambles when Dover often comes to a standstill due to operation stack
- When is shortages of private hires

Respondents were asked if the signage and marking for current taxi ranks was effective. If not, how could this be improved? Are there any particular issues at particular ranks? Responses included the following statements:

- The signage should explain the difference between hackney & private hire cars & why private hire vehicles can't use the ranks or be flagged down.
- Signage could be improved and more noticeable. Most members of the public park on the ranks because they aren't even aware it's a rank.
- Existing signs are too small , I've had people before tell me it's a loading bay and that it's not a taxi rank. The signs need to be larger with a warning that people will be fined by post for parking their car there and the fine needs to be big enough that they take notice!
- Signage in the pedestrianised town where we cannot have a rank could have signage to taxi ranks. Also St James retail park signage to the taxi rank.

- Taxi [rank] direction in the pedestrian Area of Dover
- All Dover ranks need much better signs and markings

Respondents were asked; Do you feel that the level of customer care and service quality from Hackney Carriage drivers in general in Dover District is satisfactory? 83% of respondents felt that customer care and service was satisfactory.

Respondents were asked; Are there any benefits to the public associated with restricting the number of hackney carriages? If so, could you tell us what advantages there are? Responses included the following statements:

- If private hire cars became hackney carriages then the public would not be able to call for a taxi to pick them up at their home or other location. They would have to walk to a taxi rank.
- Increasing the number of Hackney Carriage Licenses, would not benefit the Public, as they would be snapped up by existing private hire vehicle owners, so would not increase the supply. The only way increasing the number of HV would benefit the public is if the type of vehicle had to be satisfied to get a new HV licence i.e wheelchair accessible, MPV etc
- No I wouldn't say it would benefit the public either way, usually they wait at the rank as they know a taxi will be back soon, the impatient ones tend to opt for private hire if there is no taxi on the rank.
- None open it up so everyone can be a Hackney.
- Yes as it encourages drivers into the trade, as if there were more Hackney carriages people would struggle to make ends meet on the current level of trade, it also promotes good conduct as the Dover federation also demands good standards from Hackney drivers. There are also enough taxis for the current business level.
- The problem is the Lack of Private hire Drivers, and the drivers are just getting older and no young new drivers coming through the Ranks, this is the biggest issue that started before Covid.
- More Hackney plates would have a detrimental effect on current takings and discourage people from the trade.
- Restriction by survey (no significant unmet demand) means there is already sufficient number.

Respondents were asked if they had driven a private hire vehicle or hackney carriage, in Dover District, prior to the spread of Covid-19. 83% of respondents indicated that they had driven a licensed vehicle prior to the spread of Covid-19.

Those who had been driving prior to the spread of Covid-19 were asked for opinions regarding their work patterns, working hours and levels of demand.

Around 56% of hackney carriage drivers indicated that they worked a different pattern of daytime and night time hours. Around 50% of hackney carriage drivers felt that there was less night time demand currently.

Around 40% of private hire drivers indicated that they worked a different pattern of daytime and night time hours and around 60% of private hire drivers felt that there was less night time demand currently.

Respondents were asked if there were any other comments that they would like to make. Comments included the following statements:

- I think more should be done to stop private hires taking hackneys fare off ranks
- I would like to have a face to face meeting with a member of the survey team. I am a Director of a mixed HV and PHV taxi firm operating in Deal. I am not sure if this is allowed, so I have completed this form to the best of my ability.
- I feel that the ranks need to be better placed and better monitored, I know parking services do their best but they are not there all the time , with better signage on the ranks and cameras, that way the people who park there could be fined and it would make them think twice . The taxi rank is where we work, I don't go into peoples offices and sit in front of their computer so they can't work, but it seems acceptable? for people to sit where I work. The camera footage of number plates could go straight to parking services to be processed ,(The DDC would reap back what was spent on making our ranks a safer place to work in a few months) and eventually we would be able to wait on the ranks for work because then we would be able to.
- I have held a taxi license for 40 years. Since COVID, things have changed a lot. Most drivers that remain only want to work Monday to Friday days so weekends and nights that is not enough cars to cover the work and the sad thing is i can only see things getting worse.
- DDC Licensing do a good job but we very very rarely see anyone out on the ranks, that would be nice.
- As a fairly new private hire driver, I have received more "grief" from Hackney drivers than anyone else in my time as a taxi driver. They are very territorial and constantly blame private hire for "stealing" their fares when in actual fact I have watched some of them try and coax prebooked customers into their cabs after being told that they had prebooked. Furthermore, I have been "offered" fares by Hackney drivers that they don't want to take, e.g. from the

cruise terminal to dover marina hotel because it's not a good enough fare for them.

- I think the picture this year is not at all representative of what will be an average year. More people are doing staycations in place like Dover on the coast due to lack of confidence because of the following :- lack of confidence in booking P&O ferries due to the farce and uncertainty after sacking all the crew. Lack of confidence in traveling from Airports due to the baggage staff, flight cancellations and Border force shortages. The unprecedented heat wave drawing people to coastal towns. All these teething problems after Covid things have contributed to a false picture this year of the average year and going forward.
- I've been an operator for over 20 years, and I talk to other operators who are willing or are considering packing up altogether, a lot of these Private hire companies are not making money, due to a Lack of Drivers, etc, and are barely keeping afloat. But the suggestions I have highlighted if implemented may help to bring this industry back to life.
- As is, with the entire Local economy is suffering somewhat due to the Lack of Taxis. Who is going to go out for a meal etc. if you can't get home?
- More assistance from licensing to make it easier to get new drivers through. Look at vehicle age under current climate new/used cars are 40% more expensive so why can't a vehicle of 8years of age be looked at and extended. Other authorities allow vehicles of 12-15 years old. if they are roadworthy and clean/tidy what's the issue with extended it's life cycle as a taxi.
- I would to see more action taken against Drivers parking on Dover taxi ranks as we are abused on a daily bases if we ask them to move. Maybe a rank like Deal where only taxis can go in.
- Recently, more Hackney demand due to dwindling private hire supply

Other comments from respondents and trade representatives.

The greatest challenge facing the licensed vehicle trade in Dover District appears to be related to limited driver numbers. During the Covid-19 restrictions, many drivers took up other opportunities to earn a living, as the income from driving hackney carriages and private hire vehicles was very limited. Many of the drivers who left the trade, have not returned as demand increased.

Some new potential drivers have expressed interest in becoming licensed drivers. However they have been put off by the cost and time associated with becoming a licensed driver. i.e. the cost of a medical certificate, DBS certification, knowledge test and licensing fees.

Getting drivers to cover night time shifts is difficult. Drivers prefer to work daytime hours, if they can earn enough on those shifts. Consequently and understandably, drivers prefer not to work anti-social hours and face additional hassle from drunk people late at night.

Overview of trade consultation

Lack of drivers was a significant issue and booking office operators would welcome more drivers into the trade. They feel that there is more demand which could be met with more drivers.

Responses from the trade indicated that there was significant reliance on pre-booked hires for much of the trade.

From the drivers' perspective, there is less night time demand than in the past.

The hackney carriage trade is largely split geographically between Dover and Deal and drivers tend to stick to one area.

Vehicles parking on the ranks can be an issue, as is lack of sufficient space for all the vehicles which may want to wait on particular ranks from time to time.

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 can lead to a queue of people building up, some of who may walk off, 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 a queue of passengers can be observed at a Hackney Carriage rank, whilst a queue of Hackney Carriages is present, waiting to pick up passengers. This can occur when the level of demand is such that it takes longer for vehicles to move up to waiting passengers than passengers can board and move away. This often occurs at railway stations, but can also occur at other ranks where high levels of passenger arrivals occur. We do not consider this is unmet demand, but geometric delay and although we note this, it is not counted towards unmet demand being significant.

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

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

ISUD draws from several different parts of the study data. Each separate component of the index is designed to capture a part of the operation of the demand for Hackney Carriages and reflect this numerically. Whilst the

principal inputs are from the rank surveys, the measure of latent demand comes from the public on-street surveys, and any final decision about if identified unmet demand is significant, or in fact about the value of continuing the current policy of restricting vehicle numbers, must be taken fully in the context of a careful balance of all the evidence gathered during the survey process.

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

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

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

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

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

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

Periods when schools are not active can lead to more Hackney Carriage vehicles being available whilst they are not required for school contract work. Such periods can also reduce Hackney Carriage demand with people away on holiday from the area. Generally, use of Hackney Carriages is

higher in December in the run-up to Christmas, but much lower in January, February and the parts of July and August when more people are likely to be on holiday. The factor tends to range from 0.8 for December to 1.2 for January / February.

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

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

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

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

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

ISUD value

For the 2022 survey, average passenger delay was 1.03 minutes (1 minute 2 seconds). Periods when passengers had to wait for a hackney

carriage to arrive at the rank amounted to 7.9% of the observed off peaks hours.

32 % of passengers travelled in hours when there was an average wait of over a minute. The demand profile did not exhibit highly peaked demand, resulting in a factor of 1.0 being used. The seasonal factor is 1.0. The latent demand factor was 1.408. The resultant **ISUD** value of **366.6** is greater than the value of 80 that would suggest the observed unmet demand might be significant. Consequently, this suggests that there **is significant unmet demand**.

Table 5 ISUD Components

ISUD component	2022
Average passenger delay	1.03
Off peak hours with observed waiting	7.9
% of passengers travelling in hours with average queue over a minute	32
Seasonal factor	1.0
Peak factor	1.0
Latent demand factor	1.408
Overall ISUD index estimate	366.6

8 Comments on population growth and railway statistics

Population growth

The population is forecast to grow from 118,514, in 2020 to approximately 134,300 people by 2040, based on KCC Housing Leds Forecast 2021.

The demand for licensed vehicles is related to a variety of drivers, these include population levels, transport interchange and visitor numbers related to business travel and tourism. With a stable population level, demand will tend to grow, in response to increased affluence and disposable income. Thus there is an elasticity of demand relative to population, related to growth in disposable income. With the addition of population growth, the growth in demand for licensed vehicles, including Hackney Carriages will tend to grow in line with the combination of population growth and the demand elasticity.

Visitor numbers tend not to be directly related to local population, but are linked to visitor attractions and accommodation availability. Business visitors tend not to be linked directly to population levels but are driven by business premises which tend to attract visitors. For example, in towns and cities which have higher numbers of business headquarters, these premises tend to host more visitors than other types of business premises. When we compare the licensed vehicles per 1,000 population statistics of larger towns and cities, with smaller towns, the influence of business travel and interchange trips (airport and main rail station licensed vehicle trips) tends to result in higher ratios of licensed vehicles per population.

In Dover district, the cruise terminal and passenger ferry terminal, in Dover, draw trips. Some of the people travelling to and from the cruise terminal and the ferry terminal also use rail travel to and from Dover Priory Station, for part of their trip. Travel by licensed vehicle between the railway station and the ferry and cruise terminals is a common generator of demand. This feature illustrates how demand for licensed vehicles can be generated by facilities within the District, which are not related to population.

Railway Statistics

Some demand for licensed vehicles is related to rail passenger volumes. Where rail passenger volume increases, we would expect to observe some increase in associated use of licensed vehicles by rail passengers.

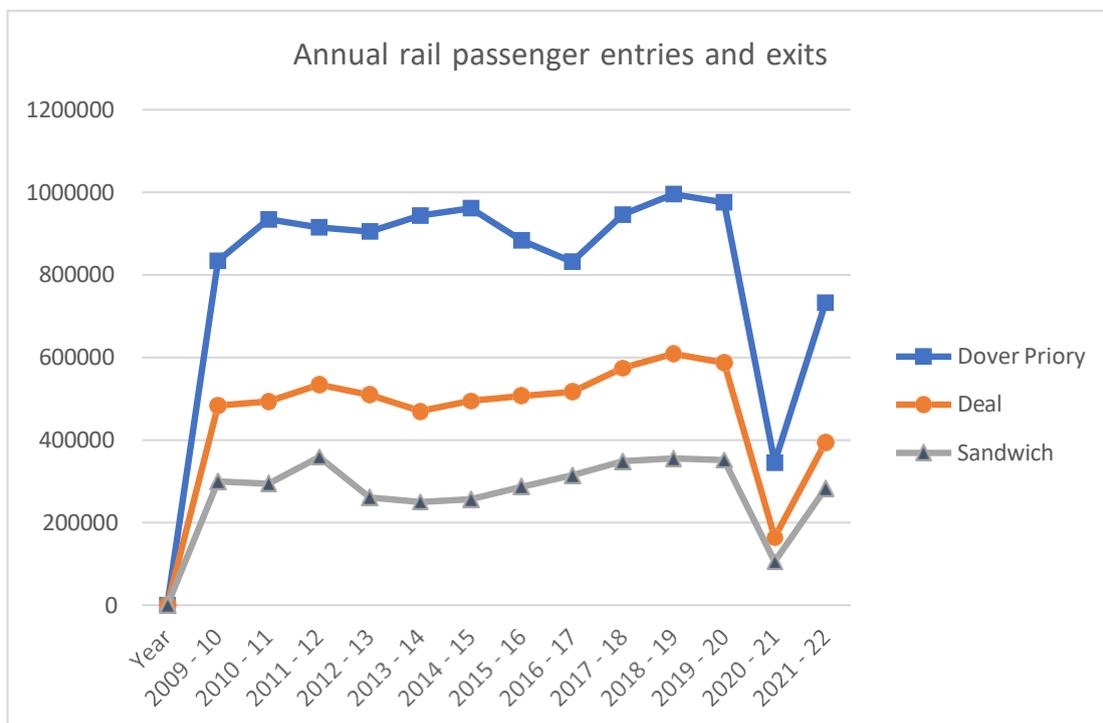


Figure 7 - Annual passenger movements at principal Railway Stations

Data is available for annual passenger numbers each year, from 2009 to 2022.

Dover Priory station has a taxi rank and we would anticipate a direct correlation between changes in rail travel demand and demand for Hackney Carriages hired from the rank. The stations in Deal and Sandwich are not directly served by attended taxi ranks and hence demand for licensed vehicles is likely to relate to hires booked by telephone or mobile app. Notwithstanding this feature, the general demand for licensed vehicle travel to and from the stations is likely to be influenced by patronage levels.

Patronage for the 2020 – 21 year was dramatically reduced for each of the three stations featured. This year was impacted by Covid-19 mitigation measures, including travel restrictions and encouragement to work from home where feasible. As a consequence, public transport volumes on all modes were affected.

Rail travel had partially recovered to pre-Covid levels. During the year 2021 – 22. However, volumes remain suppressed at around 80% of pre-Covid levels.

8 Summary and study conclusions

General availability

Feedback from the public and stakeholders suggests some dissatisfaction and concern regarding availability of licensed vehicles at times. There was particular concern regarding availability at night.

Feedback from the trade indicates that lack of drivers, particularly private hire vehicle drivers, has led to shortages of provision. The reduction of active licensed vehicle drivers is a national phenomenon in the UK. Licensed vehicle drivers took up alternative means of earning an income during Covid-19 mitigation measures. Whilst these measures are no longer in place and demand for licensed vehicles has increased since then, drivers have not all returned to their previous occupation, driving private hire vehicles and hackney carriages. The licensing statistics indicated in Table 2 indicate a decline in recent years in both private hire vehicles and licensed vehicle drivers. The proportionate drop in total licensed vehicles and total licensed vehicle drivers is similar. It is likely that the statistics for drivers may lag behind the actual number of actively operating licensed vehicle drivers. Drivers are generally licensed for 3 year periods. So some drivers who have left the trade, during the Covid-19 related downturn in trade, may still be licensed, even though they are working in another field of employment.

In Dover District, the number of private hire vehicles licensed has decreased since 2019, whilst the number of hackney carriages has remained constant.

The level of licensed vehicle capacity available to the travelling public, is dependent on how many licensed vehicles are operational combined with how many licensed vehicle drivers are available to drive these vehicles.

Pre-booked hires are a significant component of the work undertaken by hackney carriages in Dover District. Indeed, for some, all hires are obtained without visiting taxi ranks. Not all areas within Dover District have active taxi ranks. Any restrictions in availability of private hire vehicles (through reduced vehicle and driver numbers) are likely to have a knock on impact on hackney carriage hires and availability. Pre-booked demand for private hire vehicles is likely to transfer readily to hackney carriages.

Some booking office operators book trips for both private hire and hackney carriages. The customers of such operators may make no distinction between the type of licensed vehicles which fulfil their bookings.

If hackney carriages are kept busy with back to back pre-booked hires, they are likely to have less time available between hires to visit taxi

ranks. This phenomenon can lead to a significant increase in passenger waiting at taxi ranks, related to relatively modest changes in demand. A relatively modest increase in availability of hackney carriages at the ranks would be likely to significantly reduce the level of passenger waiting at ranks.

A particular issue for the public is lack of availability of licensed vehicles at night. This applied both to rank based availability and availability to pre-book a licensed vehicle. Feedback from the trade indicates a preference amongst active drivers to work daytime hours rather than more anti-social night time hours. This is understandable, as the night time hours are perceived as higher risk and more difficult, owing to having to deal with drunk passengers.

There was a notable perception within the trade questionnaire feedback that drivers perceived that night time demand was low. This contradicts public feedback that availability of licensed vehicles at night is low and feedback indicating high levels of latent unmet demand. This situation could well lead to a self-fulfilling prophecy as; if the trade don't recognise the existence of demand at night and customers don't expect to be able to hire a licensed vehicle at night, potential passengers will not attempt to hire licensed vehicles and drivers will not provide the capacity at those times.

It is noted that booking offices are aware of the unmet night time demand and are frustrated at the lack of drivers available to meet that demand.

Reduced driver numbers may have reduced competition between drivers and reduced wait times between hires, for both private hire and hackney carriage drivers. If so, this phenomenon would result in drivers being busier than they would have been pre-Covid, when more drivers were operating. Consequently, drivers would have more freedom to choose the hours that they work in order to meet earnings targets.

If the number of operating drivers were to increase in the future, it is likely that increased competition would encourage more drivers to work the more anti-social night time periods.

Wheelchair accessible vehicles

Lack of wheelchair accessible licensed vehicles has been raised as an issue which had been growing in severity in recent years, including prior to Covid-19. Lack of licensed vehicle drivers has also exacerbated the issue.

Wheelchair users face limitations in the availability of wheelchair accessible licensed vehicles. Some wheelchair users can travel in vehicles, having moved out of their wheelchairs and therefore, do not need a wheelchair accessible vehicle. However, others are not able to move from their wheelchairs, as they cannot travel without the support their wheelchair offers. Other wheelchair users could potentially transfer

out of their wheelchair into a vehicle seat, but cannot achieve this without extensive assistance. Not all drivers are able or willing to offer assistance to physically assist passengers out of wheelchairs and into the seats in a licensed vehicle.

Some motorised wheelchairs are substantially heavier than self-propelled wheelchairs. Some wheelchair accessible vehicles, with high floors have ramps with steep gradients to board wheelchairs. Drivers of some vehicles with steep ramps cannot readily cope with the weight of a heavy electric wheelchair combined with the weight of the wheelchair user.

The historic decline in the number of wheelchair accessible licensed vehicles which are licensed in Dover District corroborate the feedback from stakeholders that problems which wheelchair users face, have become worse over recent years.

Wheelchair users face anxiety and stress associated with trips which other members of the community would undertake with little concern. Some wheelchair users can feel trapped in their homes.

Some buses offer space for wheelchair users to board the buses and travel on scheduled services. The use of buses is seen as relatively reliable. However, there is some perception that the availability of scheduled bus services has been reduced in recent years, leading to greater reliance on licensed vehicles. Therefore, the reduced availability of wheelchair accessible licensed vehicles increases the frustration and isolation perceived by wheelchair users.

Demand versus supply

Passenger volume at taxi ranks at night was low, compared with daytime levels of use. This pattern of use, whilst somewhat counter intuitive, corroborates feedback from the trade and from the public. The majority of night time demand appeared to be met by pre-booked hires. These pre-booked hires were fulfilled by both hackney carriages and private hire vehicles.

Public consultation indicated a relatively high level of latent unmet demand for hackney carriages available to be hired from ranks, especially at night. If the public don't expect to find hackney carriages available at the ranks at night then they are less likely to visit the ranks to hire hackney carriages.

Booking offices and licensed vehicle owners have indicated that they need more drivers to meet demand.

Potential measures to consider

Some potential measures which could be considered, in order to increase the level of availability of hackney carriages to meet rank based demand are as follows:

- **Do nothing** – There is some interest from people who would like to become a licensed driver. Over time, it is likely that the number of licensed vehicle drivers will increase. Similarly, it is likely that some new drivers will also license a private hire vehicle which they will operate.
- **Increase the number of hackney carriage licences** – Feedback from the trade indicated that if more hackney carriage licences are released, some of these licences would be likely to be taken up by existing licensed vehicle drivers, who currently own and/or drive a private hire vehicle. They would convert their private hire vehicle licence to a hackney carriage licence. As such, the level of increased availability of hackney carriages may be limited. However, some additional capacity would be likely to be provided by new drivers entering the trade, either to directly operate a new hackney carriage licence, or to fill the gap left by existing drivers transferring from operating a private hire vehicle, to a hackney carriage vehicle.
- **Change tariff 2** – Hackney carriage fares increase by 50% after midnight, when the fares change from tariff 1 to tariff 2. If the changeover time was moved to an earlier time, this may encourage more drivers to work evenings and nights.
- **Increase fares** – The hackney carriage fares level in Dover District is below average for the country as a whole. Potentially, increased fares income could encourage more people to become licensed vehicles drivers.

With respect to measures aimed at increasing availability of wheelchair accessible licensed vehicles, there are some potential measures which may be explored:

Identify the potential income from targeting mobility impaired passengers – People with mobility impairments tend to use licensed vehicles more frequently than the general public at large. In some parts of the country, mobility impaired users are successfully targeted by operators who have identified this as a valuable market sector. Where reliable services are provided, mobility impaired passengers are more likely to travel for discretionary trips, such as to restaurants and cinemas etc.

Issue additional hackney carriages vehicle licenses for wheelchair accessible vehicles only – Additional wheelchair accessible vehicles in the hackney carriage fleet may provide additional opportunities for wheelchair users to hire an appropriate vehicle. However, it should be noted that there is no guarantee that any holder of a wheelchair accessible vehicle hackney carriage license will actively seek hires from wheelchair users.

Recommendation

In order to take action to address the shortfall in hackney carriage capacity available to the travelling public, the potential measures available for the Council to implement are limited. It is not feasible to directly apply measures to recruit additional drivers, or to force more drivers to operate at night.

Measures are limited to increasing the number of hackney carriages which may be licensed and increasing the fares which may be charged by hackney carriages.

Any change in the fares table are not covered within the scope of this report. However, a recommendation is made regarding the number of additional hackney carriages which would need to be licensed, in order to address the level of unmet demand.

In order to bring the level of unmet demand measured by the ISUD index, to a value below 80, the number of hackney carriages would need to be increased by 8.1%. This equates to between 5 or 6 additional hackney carriages.

The lower level of 5 additional hackney carriages is recommended.

The recommended increase is based on the current number of hackney carriages which attend the ranks at different times of day. It is anticipated that the introduction of more hackney carriages will also influence working practices of existing drivers.

Incidences of passenger waiting, with the introduction of 5 more hackney carriages, will not be completely reduced to zero. However, it is anticipated that fewer passengers would have to wait at taxi ranks and the wait times would be lower. In consequence, the level of unmet demand would be anticipated to fall below the threshold value which is deemed to be significant.

The availability of wheelchair accessible licensed vehicles has declined in recent years. There has been feedback through consultation that the lack of availability of wheelchair accessible vehicles significantly limits travel opportunities for some disabled users. Consequently, if additional

hackney carriage vehicle licences are released, the Council may want to consider applying vehicle type conditions to ensure that any additional hackney carriage vehicles are suitable wheelchair accessible vehicles.