Havant Borough Council

Hackney carriage unmet demand survey

March 2023

Executive Summary

This Hackney carriage unmet demand survey has been undertaken on behalf of Havant Borough Council following the guidance of the April 2010 DfT Best Practice Guidance document, and all relevant case history in regard to unmet demand. This Executive Summary draws together key points from the main report that are needed to allow a committee to determine from the facts presented their current position in regard to the policy of limiting hackney carriage vehicle licences according to Section 16 of the 1985 Transport Act. It is a summary of the main report which follows and should not be relied upon solely to justify any decisions of a committee, but must be read in conjunction with the full report below.

A wide range of information was gathered during the period between February and July 2022 and was then drawn together to identify any latent or patent unmet demand across the council area, and to conclude if this observed unmet demand was significant or not.

The trend of increased focus on the only active rank together with reduced level of vehicles servicing this location continues. This is not a result of COVID but the continuation of a trend first noted in 2016. The key issue is low demand for hackney carriages in the Borough worsened by the impact of COVID on rail station demand. The continued fee for servicing this rank levied by an external body adds to the issues. The pandemic has worsened the situation given that the already minimal demand reduced further forcing even more dependency on other income sources. Some of that focus has remained, leaving service worse as some demand returned.

Urgent action is needed to determine the future of hackney carriages in the Borough and in particular good service to those using the station by hackney carriage to avoid and hopefully reverse the patronage loss there. Increase of or removal of the limit on vehicle numbers would have no significant positive impact and could well worsen the situation – detailed working through with vehicle owners has to be the most productive way forward to identify the real issues and see if there is any way to resolve them.

Glossary

The following terms are used through this report:

HCV – hackney carriage vehicle

PHV – private hire vehicle

BPG – Best Practice Guidance

DfT – Department for Transport

EV – electric powered vehicle

ISUD – index of significance of unmet demand

LV – licensed vehicle, either private hire or hackney carriage

Minicab – mainly London term for private hire vehicle

SUD – significant unmet demand

Taxi – Government and legal term for hackney carriage

- Public term for both hackney carriage and private hire

ULEV – ultra low emission vehicle

WAV – wheelchair accessible vehicle

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1 General introduction and background

Havant Borough Council is responsible for the licensing of hackney carriage and private hire vehicles operating within the Council area and is the licensing authority for this complete area. Further details of the local application of Section 16 of the 1985 Transport Act with regard to limiting hackney carriage vehicle numbers is provided in further Chapters of this report. Hackney carriage vehicle licences are the only part of licensing where such a stipulation occurs and there is no legal means by which either private hire vehicle numbers, private hire or hackney carriage driver numbers, or the number of private hire operators can be limited. This current report was drafted and agreed during September 2022, but using data principally collected during Spring 2022.

The Best Practice Guidance

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

Whilst several sections of the BPG were revised by the issue of the "Statutory Taxi and Private Hire Vehicle Standards" (STPHVS) on 23rd July 2020 (see more detail below), none of these resulted in any material change to the elements regarding unmet demand and its review. The relevant sections of BPG therefore remain the appropriate guide for undertaking this review. The wider revision of the BPG was issued on 28th March 2022 with the consultation closing on 20th June 2022. No date has yet been given for responses or action from the consultation. Two new elements of legislation are now enacted, with regards to driver history and service to those with disabilities.

Background

Current hackney carriage, private hire and operator licensing is undertaken within the legal frameworks first set by the Town Polices Clause Act 1847 (TPCA), amended and supplemented by various following legislation including the Transport Act 1985, Section 16 in regard to hackney carriage vehicle limits, and by the Local Government Miscellaneous Provisions Act 1976 with reference to private hire vehicles and operations. This latter Act saw application of regulation to the then growing private hire sector which had not been previously part of the TPCA. 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 vehicle' to refer to both hackney carriage and private hire.

The legislation around licensed vehicles and their 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 current BPG in fact says "most local licensing authorities do not impose quantity restrictions, the Department regards that as best practice".

The most recent reviews were by the Office of Fair Trading in 2003, through the production of the BPG in 2010, the Law Commission review which published its results in 2014, the Parliamentary Task and Finish Group reporting in September 2018, the Government response to this in February 2019, the consequent consultation on "Protecting Users" that ended April 2019 and finally the issue of the STPHVS in July 2020. The only recent change has been confirmation by the Government that they expect the requirements of the STPHVS to be materially concluded by the end of 2021. The new draft BPG was issued with consultation ending on 20th June 2022.

Other groups have provided comment but the upshot remains no change in legislation from that already stated above with the most response provided by those opposing restrictions in licensing per se.

With respect to the principal subject of this survey, local authorities retain the right to restrict the number of hackney carriage vehicle licenses. The Law Commission investigation 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. However, there is currently no expected date either for publication of the Government response to the Law Commission (now assumed to be in terms of the STPHVS), nor indeed any plans for revisions to legislation, apart from the two private members' bills now passing through parliament in regard of the use of the register of refused drivers and usage of the wheel chair accessible vehicle listing becoming mandatory.

Present background to policy

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

There are various levels of strength of the types of vehicles allowed where there is encouragement for WAV style vehicles. The tightest restriction, now only retained by a few authorities only allows 'London' style wheel chair accessible vehicles, restricted to those with a 25-foot turning circle, and most recently principally the LTI Tx, the Mercedes Vito special edition with steerable rear axle, and the Metrocab (none of these are now produced).

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

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

Unmet demand and its significance

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 authority's. This is mainly due to some court cases in Scotland taking interpretation of the duty of the licensing authority further than is usual in England and Wales, requiring current knowledge of the status of unmet demand at all times, rather than just at the snap-shot taken every three years. However, the three year survey horizon has become generally accepted given the advice of the BPG and most locations that review regularly do within that timescale (although the recent pandemic has minimised the number of studies undertaken since March 2020).

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

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

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), enactment of Sections 165 and 167 of the Equality Act, albeit on a permissive basis (see below), and two new 2022 Acts (which were not in place at the time of the data collection for this survey).

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. The Taxi and PHV (Disabled Persons Bill) Act 2022 further strengthens the requirement on drivers with regard to the council listing and seeks to ensure disabled people can use taxi and PHV services with confidence they will not be discriminated against. It was made active in April 2022.

The Taxi and PHV (Safeguarding and Road Safety) requires all authorities to share information about drivers and was made active on 31st May 2022.

The STPHVS requires update to be provided to the DfT in regard to:

- Production of a comprehensive policy document
- Review of CCTV requirement and value
- Documentation of passenger complaints.

All of these items should have been completed by early 2022 by authorities.

Case law and unmet demand

In respect to case law impinging on unmet demand, the two most recent cases were in 1987 and 2002 with three other cases (each with novel twists) in 2019 (see below). The first case (R v Great Yarmouth) concluded authorities must consider the view of significant unmet demand as a whole, not condescending to detailed consideration of the position in every limited area, i.e. to consider significance of unmet demand over the area as a whole.

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

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

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

Current status regarding unmet demand studies

In general, industry standards suggest (but specifically do not mandate in any way) that the determination of conclusions about significance of unmet demand should take into account the practicability of improving the standard of service through the increase of supply of vehicles. This is even more important since the wide changes in both supply and demand that have occurred arising from the pandemic and the resulting churn in employment resulting.

It is also considered by industry practitioners that it is important to have consistent treatment of authorities as well as for the same authority over time, although apart from the general guidance of the BPG there is no clear stipulations as to what this means in reality, and certainly no mandatory nor significant court guidance in this regard.

One clear response from the APPG was that the right to retain limits on hackney carriage vehicles remained generally supported with some call for the Scottish option of limiting private hire vehicle numbers to be added to the potential tools available to local authorities in England. Both Wales and Northern Ireland now have very different licensing regimes and none retain any limits on vehicle numbers.

As is usual in a diverse industry, other formal and informal groups continue to suggest potential changes to licensing that might be applied – but none of these, however strongly presented, have any legal weight and must be taken fully in context. This includes various changes arising from need to consider pollution and air quality issues although some elements of this will legally apply, but at a much higher level than specific licensing legislation, which may imply clashes with established legislation and more so present practice.

Conclusion

The present legislation in England and Wales sees public fare-paying passenger carrying vehicles firstly split by passenger capacity. All vehicles able to carry nine or more passengers are dealt with under national public service vehicle licensing. Local licensing authorities only have jurisdiction over vehicles carrying eight or less passengers. Further, the jurisdiction focusses on the vehicles, drivers and operators but rarely extends to the physical infrastructure these use (principally ranks).

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

Drivers can either be split between ability to drive either hackney carriage or private hire, or be 'dual', allowed to drive either kind of vehicle (or in some cases a mixed set of conditions, e.g. hackney carriage drivers being able to drive either whilst private hire cannot drive hackney carriage). Whilst a private hire driver can only take bookings via an operator, with the 'triple-lock' applying that the vehicle, driver and operator must all be with the same authority, a hackney carriage driver can accept bookings on-street or by phone without the same stipulation required for private hire.

For Havant Borough, drivers have a single licence allowing them to drive either a hackney carriage or private hire, as necessary. This does, however, mean that knowing how many drivers there are for the two separate kinds of vehicle is much more difficult.

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

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

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

There is also strong current pressure on licensing authorities to work with the environmental sections of their authorities in order to assist in the reduction of vehicle emission issues within Government guidelines.

Whilst there are a number of authorities now mandated to introduce Clean Air Zones, other authorities presently do not have such stipulation although there remains strong pressure on health grounds to take action. Given that many hackney carriages, and particularly the larger ones including those that are wheel chair accessible, were encouraged to use diesel vehicles, which are now seen as the more critical contributors to the worst elements of air pollution, often there is strong pressure to see reduced emissions from the overall licensed vehicle fleet. A Greater-Manchester wide review of clean air and overall licensed vehicle conditions has been concluded and is being implemented over time at present.

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

Coronavirus

The serious Covid-19 virus took hold in the UK during March 2020. Whilst life carried on almost as normal until mid-March, formal lockdown was applied from Tuesday 24th March 2020 until further notice. Significant reductions in movement had begun to bite from the previous week. The last dates in 2020 when on-street and rank surveys occurred were effectively Sunday 16th March 2020.

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

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

After that, new Tiers were introduced and then again another national lockdown from early January 2021 but with the start of vaccinations providing some hope of an eventual overcoming of the impacts of the virus.

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

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

Early 2021 saw more confidence that the 'omicron wave' could be survived although in early January there was pressure on many industries arising from staff isolating. Various methods were being considered to minimise the impact of need to self-isolate. By the end of February all legal restrictions in England were removed with the focus clearly moving to 'living with the virus' although unintended consequences of rising fuel and other prices from the reopening of the economy were also exacerbated by the current issue of the Ukraine occupation. At the time of writing this report (September 2022) there was a high (but reducing) level of infection but the link between infection and serious illness appeared to have been broken, although the need to keep levels of immunity to severe disease may well lead to further immunisation as time proceeds.

Overall, the pandemic led to a significant period of lack of business for both hackney carriage and private hire vehicles, in various ways as the pandemic developed. Some of the impacts of this are discussed in public and driver attitude chapters below, as well as review of impact on demand in the rank chapter.

More significant was the reappraisal of many as to their involvement with the industry, and the general job market churn that was instigated not just in the taxi arena. Further, the impacts of the developing war in Ukraine and other economic changes is again putting pressure on costs of providing licensed vehicle services and pressure for fare increases.

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2 Local background and context

Key dates for this Hackney carriage unmet demand survey for Havant Borough Council are:

- appointed Licensed Vehicle Surveys and Assessment (LVSA) on 11 February 2022
- in accordance with our proposal of February 2022 (which had been developed over an extended period)
- as confirmed during the inception meeting for the survey held on 2nd March 2022
- this survey was carried out between February and July 2022
- On street pedestrian survey work occurred in late March / early April 2022 (covering a Thursday, Friday and Monday)
- the video rank observations occurred in mid-March 2022
- Licensed vehicle driver opinions and operating practices were obtained using an all-driver survey available during June and early July 2022
- Key stakeholders were consulted throughout the period of the survey
- A draft of this Final Report was reviewed by the client
- and reported to the appropriate Council committee following acceptance by the Council of the Report.

Havant Borough Council is one of eleven councils within the county control of Hampshire County Council. Whilst licensing is undertaken at Borough level, planning of highways and public transport occurs at the County level.

The authority has a current population of 124,200 using the initial 2021 results from the 2021 census. This value was 123,000 at the time of the last survey in 2016 (121,444 for 2013, both estimates from the 2011 census) although the 2021 new census value is about 2% lower than the equivalent estimate from 2011. About 84% of the total population are aged 15 or over.

Havant Borough Council licensing area covers a mainly urban area with the principal centre being Havant itself, although this area has several districts including Leigh Park, West Leigh, Denvilles, Langstone and Bedhampton amongst others. However, it also includes the large urban settlement of Emsworth to the East, and a large urban agglomeration to the West of the A3(M) including Waterlooville, Purbrook and Cowplain. Finally, the Borough includes Hayling Island. The whole district covers some 30 square miles.

Portsmouth is a very close neighbour and is the key destination for the main rail route which passes east-west through the Borough. At Havant the two different routes to London diverge. The through Coastway route also passes through Havant providing links along the South Coast.

As noted above, all ranks are provided in highway terms by Hampshire County Council, the highway authority for the area. A bye-law was identified that defined all ranks in the area. However, none of these ranks are used apart from the private rank at Havant Station which requires a supplementary permit from the principal train operating company. It is understood that any Havant hackney carriage can obtain a permit for this location and at the time of the last survey all but three had such permits. Unlike many other similar permits, there is no additional driver fee for this location.

Background Council Policy

Overarching transport policy is set in the latest Hampshire Local Transport Plan(LTP). The third LTP ran from 2011 to 2026 with LTP4 currently being developed (draft dated April 2022). This seeks to describe the transport vision for 2050. It sees transformational change planning for people and places rather than vehicles. Guiding Principal 1 is to significantly reduce dependency on the private car. Guiding Principal 2 seeks provision of a transport system that promotes high quality, prosperous places and puts people first. A key issue is that 37% of the baseline CO_2 emissions are from transport – excluding rail and domestic aviation (with which the value rises to 51%).

The draft LTP4 notes that transport and land-use planning have reduced levels of integration because transport is determined by the County and planning by the local planning authorities. This is highlighted in the case of licensed vehicles by the rank provision being County and vehicle / drivers local planning authorities. A key aim is ensuring significantly more people can undertake journeys from end to end by a variety of modes in a seamless manner. Again, licensed vehicles can strongly assist this.

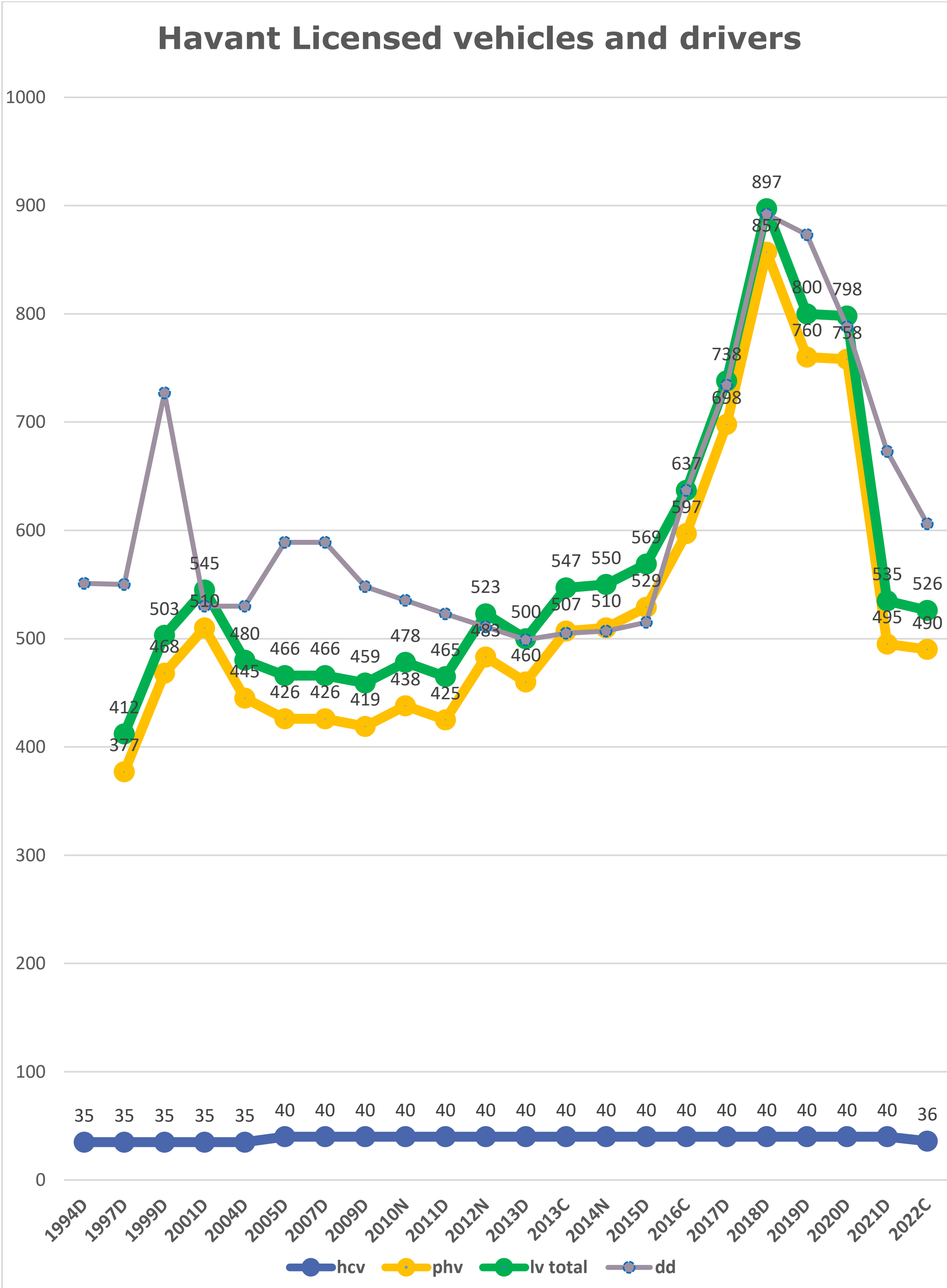
Avoiding and reducing dependency on the private car and replacing petrol and diesel vehicles with zero emission ones are dual means towards achieving Guiding Principal 1. The principal mention of licensed vehicles is in regard to rural opportunities and shared services. In LTP3, 17 taxi / car share schemes were supported. A focus on travel planning using licensed vehicles to ensure journeys that would otherwise be undertaken fully by car could be safely and effectively completed using the licensed vehicle as the glue to the integrated journey.

The Borough also has a Hackney Carriage and Private Hire Licensing policy statement dated 2017. The County continues its travel voucher scheme with a consultation on revisions that ended on 24th July 2022. This proposed removal of the taxi voucher alternative to a bus pass and sets a new £1 taxishare journey fare instead.

Licensing Outline for Havant Borough

All licensing authorities have full powers over licensing the vehicles, drivers and operators serving people within their area. Havant Borough Council has chosen to utilize its power to limit hackney carriage vehicle numbers, and as far as we are aware has done so since at least 1994, and probably much earlier than that. Surveys testing the level of the limit were undertaken in 2003, 2013 and 2016.

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



Licensing Statistics from 1994 to date

Havant Borough Council has a limit of 40 hackney carriage vehicles, in place for a significant period, and certainly during the currency of the DfT statistics.

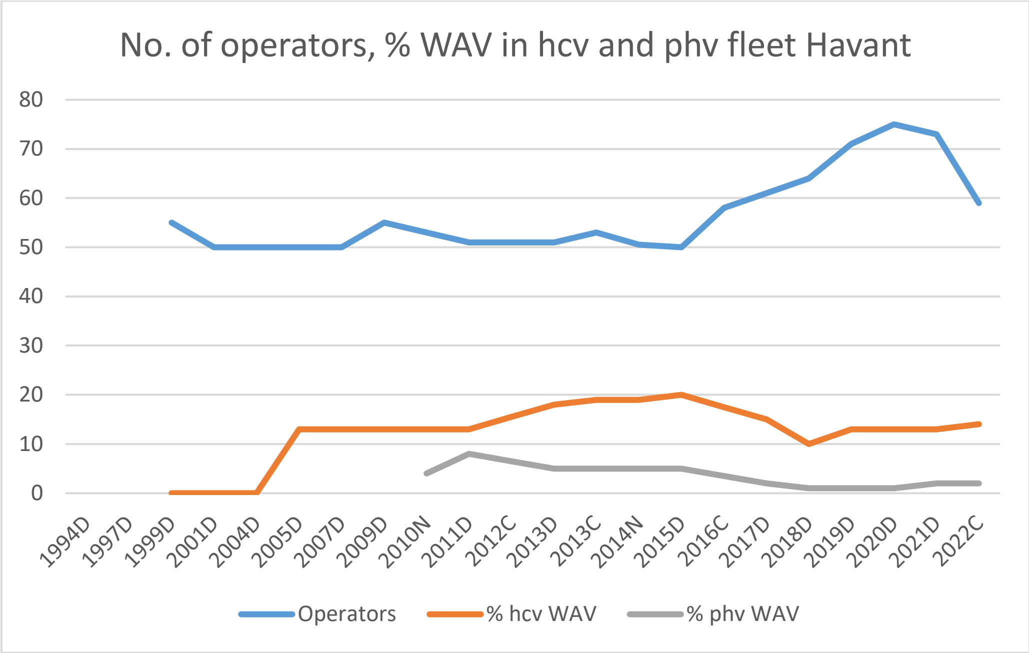
The graph shows that whilst hackney carriage numbers remain limited (and therefore stable, albeit with four plates spare at the present time), private hire vehicle numbers grew until a few years ago. 2019 then saw a drop in vehicle and driver numbers, with a small period of level numbers to 2020, but then saw a very strong decline as the pandemic first hit. Between 2021 and 2022 the decline has reduced significantly. What is interesting is that the decline in private hire pre-dated the pandemic, but was severely worsened by it. It is not clear what changed pre-pandemic to cause this but certainly the level of publicly available private hire vehicles currently must be strongly reduced compared to the previous survey.

It should be noted that there is a waiting list in place for hackney carriage plates with no specific criteria. When plates become available they are offered to the list. However, the four spare plates have all been offered and the waiting list is currently empty so there is no present economic demand for any of the four spare hackney carriage plates.

Driver numbers, however, did not see the level period and continued to decline, with a lesser reduction in the level of decline in the latest period, but still a very clear decline.

From the peak of 857 private hire vehicles and 892 dual drivers (the latter including those driving the 36 or 40 hackney carriages), the time of the survey saw private hire vehicle numbers at 57% and driver numbers at 68% of their peak levels. The drop by 10% of hackney carriage vehicle numbers is unprecedented but still significantly less than the private hire reduction.

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



Operator numbers and levels of WAV provision in the fleet

For Havant Borough Council, this graph shows a decline from 2015 to 2018 in the proportion of WAV hcv, after which there is an increase (now 14%, but this apparent proportionate increase is entirely due to the reduced total numbers, with still just five WAV). Private hire WAV show a similar trend but at a much lower level (currently 1.6% or just eight vehicles).

It also shows that operator numbers in the area have declined since the peak in 2019 just before the pandemic. The level is currently heading towards being beneath the lowest levels of just 50 that prevailed to 2015. This suggests that the high levels of churn in the private hire market introduced by the end of a working understanding between the top two companies in 2013 has now ended and that the industry is generally returning to previous lower levels of provision.

Demand Surveys

Havant Borough undertakes regular review of its policy to limit hackney carriage vehicle numbers in line with the BPG. Previous surveys were in 2016, 2013 and 2003. This current survey was due for repeat in 2019, but the option to undertake then was delayed by administrative issues, after which delay occurred whilst the pandemic was dominating potential demand.

3 Patent demand measurement (rank surveys)

As already recorded in Chapter 2, control of provision of on-street ranks in Havant Borough Council is under the control of the County authority and not the local licensing authority.

Previous surveys have considered other ranks and some surveys have been undertaken to identify if any rank other than the Havant station rank was used. Discussion with the licensing officer agreed that there was no evidence for any usage of any rank beyond the station rank at this time, and for this survey only the Havant station, private rank, was surveyed. Although this is a private rank, the fact that any vehicle can have a permit means review of its usage to determine if there is unmet demand or not and if more plates might be required is valid. The other ranks remain marked and available and need / use of them was covered by the driver and public surveys.

In 2016 it was understood that all 40 hackney carriages had station permits active, although at the time of the actual survey one vehicle plate was not in use.

The rank was observed between Thursday 17th and Sunday 20th March 2022.

Overall estimated rank usage

The observed rank usage from the actual hours covered was used to estimate typical weekly demand levels at each rank, using general factors partly derived from those used in the 2016 survey to ensure compatibility as far as possible. The estimates have also been compared to those from previous surveys to identify changes in usage by rank. The results are shown in the Table below.

Rank usage estimates (passengers per week)

Rank	Passengers per week 2022 survey	Passengers per week 2016 survey	Passengers per week 2013 survey	Passengers per week 2003 survey
Havant Station	1,100	2,152	1,884	1,815
(total with Market Parade ranks and Leigh Road rank)				(2,102)
Compared to previous	***-49%***	***+14%***	***+4%***	
Compared to 2003	***-40%***			
Compared to 2013	***-42%***		***+5%***	

Comparison to previous years

The earliest information available is for the 2003 survey. Compared to observed demand then, hackney carriage rank demand is currently 40% lower. The peak level of rank patronage over the available surveys was 2016. Flows in 2022 are 49% lower than at that time. Latest national train patronage values for Havant station (but only the year up to March 2021, next figures not available till November 2022) show flows at 69% of the 2019-2020 values, although these have almost certainly increased since that time. In May 2022 it was confirmed that overall passenger levels had now reached 90% of the pre-pandemic levels in general.

In the last three surveys, full 24-hour observations have covered each Saturday. In the two previous surveys, the number of passengers was very similar at 318 in 2016 and 311 in 2013. For this survey, there were 246, 23% less. Direct comparison for Thursday and Friday were not possible but the Friday was 43% lower than that for 2016 even though the 2016 information was for less hours, i.e. the actual reduction is higher. This will be the impact of more people working from home. Whilst Fridays tend to be more affected by this, we also included a Thursday observation which when mixed with the Friday and factored up to a typical week produced the overall 49% reduction.

It is accepted that this survey was in March compared to previous years being in July (when flows might be higher), but the overall drop in patronage is very significant. Further discussion occurs in the synthesis section of the report drawing together the various strands of evidence.

Vehicle types seen

During the course of the 72 hours of observation, 1,319 different vehicle movements were observed at or near the rank. This compares to 713 in 2016 (but for less hours, equivalent to about 1,037 if factored up)(station rank only). This suggests that the location appears to be more active in total vehicle terms than in 2016. If considered in purely hackney carriage observations, there were about 17% more hackney carriage movements in 2022 compared to 2016.

Of these, 67% were hackney carriages, 27% were private cars, 3% goods vehicles, 2% private hire vehicles and 1% emergency service vehicles. This suggests there could be some issue with availability of rank space for the operating hackney carriages possibly obstructed by the number of cars seeking to pick up. A check of the videos found that in reality more non-hackney vehicles now appeared to be using the rank area for pick up and set down than in 2016. This could be a result of the relative lack of hackney carriages and the increased reliance of people on their own cars when travelling.

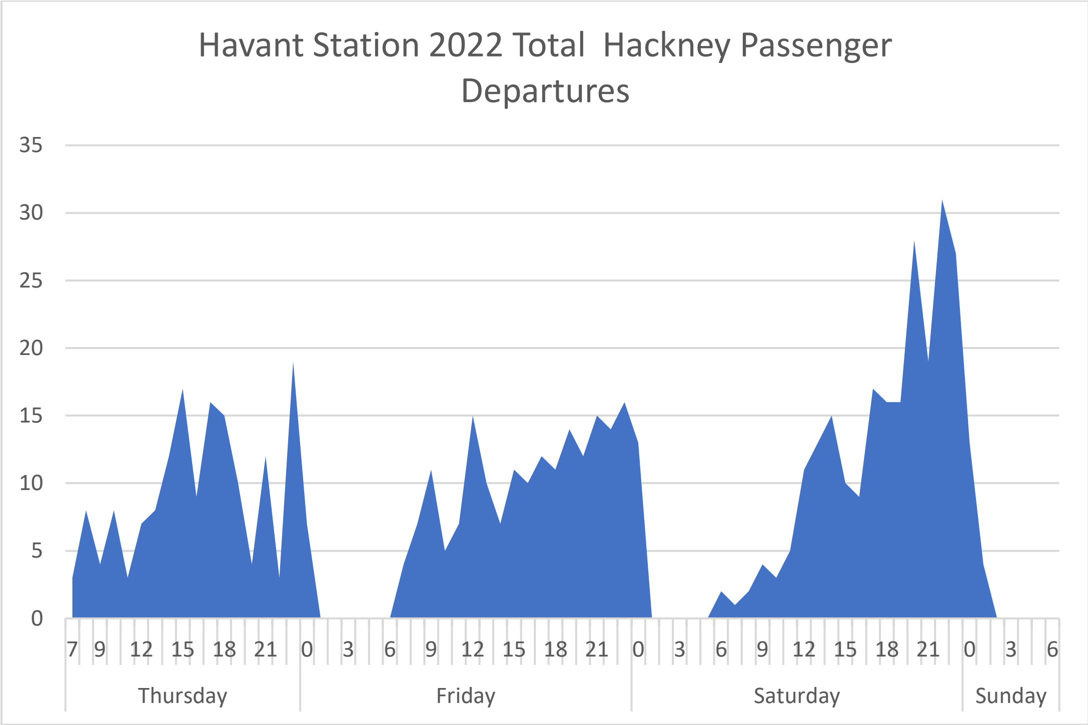
In 2016, it was noted that only private hire and hackney carriages were observed at or around the rank, suggesting the tight controls applied then are no longer as enforced or adhered to. In 2016, the proportion of hackney carriages at 73% was relatively similar to now, but the level of private cars observed was now increased whilst private hire vehicle numbers were reduced.

For the hackney carriage fleet, 15% of those observed at the rank appeared to be wheel chair accessible style vehicles. This is very similar to the 14% within the overall fleet, suggesting equal usage of both types of vehicles according to their overall frequency within the fleet. In 2016 the proportion observed was 20%, suggesting more usage of the WAV style than others per se, but only marginally so.

There were no passengers observed either travelling in wheel chairs or needing extra assistance. The none-use by those in wheel chairs is the same as in 2016, although the lack of any appearing to need extra assistance is strongly reduced from the 110 observed then (in a shorter time period).

Detailed rank observations

In 2013 the rank was observed for 36 hours in the first weekend of July. In 2016 observations were for 49.5 hours and were about a week earlier, at the end of June. The latest 2022 observations were in mid-March 2022 and covered the full Thursday, Friday and Saturday, some 72 hours in total. This increased coverage arose from decisions made generally about our methodology in 2019 before the pandemic, but also supports the current need to ensure a wider range of hours are observed at ranks to ensure robust decision-making in regard to unmet demand and its significance.



The graph shows relatively low levels of passenger demand on the Thursday and Friday. Friday demand grows from morning to evening but drops away sharply when the rail services cease. Saturday flows show a growing profile with generally lower flows up to late afternoon. After this, demand grows to a peak but again drops off sharply albeit a little later (just four passengers in the 01:00 hour). First passenger departures on the Friday were in the 06:00 hour whereas on Saturday this was in the 05:00 hour.

What is noticeable on all days is the jagged or saw-tooth nature of the demand profile. However, this is partly due to the very low numbers involved. This may relate to the rail timetable that sees 12 trains per hour but not equal five minute gaps between trains, with one case where there is a train in each direction at the same time. This can make servicing demand more difficult.

Considering all observations, the average passenger flow was just 11 passengers. This rose from 9 on the Thursday to 11 Friday and 12 Saturday. The peak flow observed in total passenger terms was just 31 in the 22:00 hour on the Saturday (2.8 times the average). The next two highest flows were 28 in the 20:00 hour and 27 in the 23:00 hour on that same day with the next highest flow just 19 passengers in the 23:00 hour on the Thursday. These are not high flows at all. In terms of actual vehicle movements, these will be even lower given occupancy of 1.5 passengers per vehicle on average.

During the course of the 2022 survey there were twelve hours of the 72 observed (17% of hours) when no hackney carriage passengers were observed. Over the hours covered from 07:00 Thursday until 06:59 Sunday morning there were no flows in the 01:00 to 05:00 hours Friday, 02:00 to 04:00 Saturday and 02:00 to 05:00 Sunday. In 2016, there had only been two hours on the Saturday and two on the Sunday without passengers. Current rail timetables see no trains between around 01:00 and 04:30.

Comparing total flows for the 24 hours ending with the 07:00 hour on all mornings, demonstrates that total flows observed on the Saturday/Sunday were about 27% higher than those observed on the Friday/Saturday. The Friday/Saturday flows were 17% higher than the Thursday/Friday, whilst the Saturday/Sunday total was 49% higher than that of the Thursday/Friday.

Average vehicle occupancy levels in 2022 are 1.5 passengers per vehicle – slightly higher than the 1.4 in 2016 (but over a shorter period). Comparing the full days in 2022, Saturday had the highest occupancy at 1.6, Thursday 1.4 and Friday 1.3. This implies less vehicles needed to meet demand on the Saturday and more on the Friday in terms of levels of vehicle occupancy.

Comparing just the hours covered in both 2016 and 2022, like for like comparison shows 2022 passenger flows 64% of those in 2016, loaded vehicle departures 57% and actual vehicle arrivals 55%, all reduced. Passenger occupancy levels were however higher by about 10% and the level of vehicles leaving empty was also 55% of its 2016 level. This presents a picture of a lesser vehicle fleet undertaking more work but partly helped by greater passenger sharing of vehicles.

Passenger delay at ranks

The 2022 survey collected 72 hours of video footage. However, initial review noted above found that some 17% of these hours saw no hackney carriage or passenger activity at all. In total, for this survey, 60 hours saw some hackney carriage or passenger activity. There were a further four hours when no passengers were observed and vehicles either had arrived to service demand in the upcoming hour, or left empty at the end of the day.

Passenger delay at ranks can be viewed in a number of different ways. Individual waits by passengers are agglomerated and summarised for each hour, presenting the main information in terms of total delay to all passengers in an hour divided by total passengers in any hour (average passenger delay, APD). A second statistic is provided considering the delay only shared between those having a delay although this is rarely commented on within our review.

Passenger maximum waits are also estimated for each hour as well as summaries again by hour of the numbers waiting between 1 and 5 minutes, 6 and 10 minutes and 11 minutes or more. More specific calculations are then undertaken with reference to if there is unmet demand or not, and if there is, if it is significant in terms of Section 16 of the 1985 Transport Act (see later chapter for this specific analysis.

Of the total hours with passenger activity, 48% saw an average passenger delay of any size. The levels of average passenger delay (total waiting time shared between all passengers in an hour irrespective of if they suffered delay or not) varied widely, from seven seconds to 10 minutes and 59 seconds. The spread of delay is shown below (the % of hours is of the total hours with delay):

Delay range	No. of hours (%)	Actual delays
Over 10 minutes	1 (3)	10:59
5 minutes to 9 min 59 s	4 (14)	8:54, 8:34, 8:20 and 5:44
2 minutes to 4 min 59 s	6 (21)	4:51, 4:28, 3:52, 2:42, 2:34, 2:29
1 minute to 1 min 59 s	4 (14)	1:45, 1:05, 1:04, 1:02
Up to 59 seconds	14 (48)	7 – 59 seconds

However, the estimated average passenger delay over all passengers was 2 minutes and 6 seconds.

23% of all hours saw average passenger delay (APD) between four seconds and 59 seconds, 7% one minute to one minute 58 seconds, 10% between 2:29 and 4:51, 7% between 5:44 and 8:54 and just 2% for the longest APD (being nearly 11 minutes). The longest delay was the hour with the third highest passenger numbers (23:00 Saturday). That hour actually saw amongst the highest occupancy value for an hour – 2.1 persons per vehicle.

The bulk of APD values are actually less than five minutes, with just 9% of active hours having APD over 5 minutes, and just under a third (30%) less than two minutes.

The hour with the longest APD also saw the second longest passenger wait for any passenger of some 18 minutes (the longest recorded wait was just under 23 minutes at 18:00 on the Saturday). The spread of maximum passenger waits in any hour is shown below:

Maximum wait range	No. of hours (%)	Actual delays
Over 20 minutes	1 (3)	22:45
15 minutes to 18:11	3 (10)	18:11, 16:41, 16:37
10 minutes to 13:31	5 (17)	13:31, 12:08, 11:27, 11:12, 10:22
5 minutes to 9 min 55 s	10 (35)	5:02 to 9:55
2 min 42 to 4 min 40 s	6 (21)	4:40, 3:46 (2), 3:42, 3:09, 2:42
1 min 20 to 1 min 53 s	4 (14)	1:53, 1:45, 1:27, 1:20

30% of all longest passenger waits are over 10 minutes with a further 35% between five and 9 min 55 s. The remaining 35% are 4 m 40s or less. However, there is only one wait longer than 18 min 11s.

Looking at the distribution of when delays were recorded, 41% were on the Saturday / Sunday (and a very large 73% of total delay time), 38% Friday / Saturday (20% of total delay time) and just 21% on the Thursday / Friday (and only 6% of the total delay time).

The worst delay begins building at 18:00 on the Saturday (the hour seeing the longest recorded passenger wait), reduces to the 21:00 hour but then grows again in the 22:00 hour to the peak of the 23:00 hour, which is actually an hour after the peak passenger flow, but the period with the third highest passenger flow, and then clears up as the train service and passenger demand ceases in the midnight hour.

In 2016 the Saturday did not see people waiting until the three hours beginning 22:00 despite passenger flows peaking in that year at 20:00 with 28 passengers.

Considering actual passenger numbers, 49% of all passengers actually experienced some delay of a minute or more. However, this is split such that 27% had waits of 11 minutes or more, 25% between six and ten minutes and 48% with waits between one and five minutes.

The harsher measure of people travelling in hours with average delay (used in the index of significance of unmet demand calculation) found 39% of all passengers travelled in hours when the average passenger delay was a minute or more (28% in 2016).

Hackney carriage activity levels

As in the previous survey, a review was undertaken of the level of hackney carriage vehicle activity during sample hours of the rank survey period. This survey was undertaken on all three days, covering three sample hours to represent late morning, late afternoon and late evening activity levels for the hackney carriage fleet.

In total, some 145 legitimate Havant Borough hackney carriage or private hire vehicle movements were observed. Of these, 57% were hackney carriages. In a few instances, hackney carriages were observed acting as private hire vehicles, not servicing the rank at that point in time.

From these observations, a total of 19 different hackney carriage plates were observed, 53% of the total (plus one only seen as a private hire). Marginally more of the active plates were observed in 2016 (54%), albeit 21 plates out of a fleet of 39 known to be active. Just nine plates seen in 2022 were also those observed as active in 2016.

On the Thursday, 15 different plates were seen, with 11 on the Friday and 10 on the Saturday. In 2016 the Friday saw 19 plates and the Saturday 16, suggesting less vehicles being active on the two busiest days in this 2022 survey. For this survey, there was only one plate observed on one day in all three time periods. In 2016 there were four such plates on Friday and one on the Saturday. Hence, not only are less plates appearing to be active, those that are active appear to be less so.

The table below presents the proportion of the fleet active in each time period on each day:

Day	10/11	17/18	21/22
Thursday	19	22	11
Friday	17	11	17
Saturday	6	14	14

This shows the fleet was most active in the Thursday late afternoon, followed by Thursday morning. Friday saw highest activity morning and late evening with a dip late afternoon. On the Saturday, morning levels were low (equating with lower demand), and the late afternoon and late evening were both higher, but not as great as either Thursday daytime proportions. This clearly suggests a fleet finding sufficient work during the week to mean apparent less need to service the busier flow levels.

Reviewing the number of times each plate was seen, 27% were only seen over the nine periods once. 11% were seen twice, 16% three times, 11% eight times (two plates) and all the remaining levels 5% (or one plate, with these seen 4,5,6,7,9,10 and 11 times). The most frequent plate was seen 11 times.

These figures suggest some focussing of supply against growing demand, but also that less vehicles tend to be less active as the night continues, i.e. people are choosing to be less willing to service late night demand. Further discussion occurs below. In essence there are less overall plates active and less of these active later. However, even in 2016 the apparent reticence to service the late Saturday night trade had led to longer delays for passengers at those times.

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4 General public views

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

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

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

Our basic methodology requires a sample size of at least 200 to ensure stable responses. Trained and experienced interviewers are also important as this ensures respondents are guided through the questions carefully and consistently. A minimum sample of 50 interviews is generally possible by a trained interviewer in a day meaning that sample sizes are best incremented by 50, usually if there is targeting of a specific area or group (e.g. of students, or a sub-centre), although conclusions from these separate samples can only be indicative taken alone. For some authorities with multiple centres this can imply value in using a higher sample size, such as 250 if there are two large and one moderate sized centre.

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

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

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

A seventeen-question survey was undertaken with 237 persons in the Havant Borough Council area (200 were obtained in 2016 and 300 in 2013). Questions were broadly similar to previous interviews apart from new questions about the pandemic impact and some changes given development of questions over time with growing knowledge of the differing needs for these surveys. This survey included interviews in Havant (100)(75,2016), Leigh Park (50)(56, 2016), Emsworth (37)(46, 2016) and Waterlooville (50), whereas 2016 included Havant, Leigh Park and Emsworth whilst 2013 covered all four areas. Surveys were undertaken on Thursday 31st March, Friday 1st April and Monday 4th April 2022. Responses were mainly from those available during the daytime, following standard practise for these interviews.

Our gender sample saw a marginally lower proportion of men (48% compared to 52% in the 2021 census). Our age sample saw marginal under-representation of the older group (less so this time, 44% compared to 46% in the census (45% compared to 48% for 2016). The mid age group results were the same as the census (36%, compared to 40% / 36% in 2016), with the younger group over-represented (20% compared to 18%) (was 34% compared to 20%). This should not have affected the results in any significant manner and is in any event better than the 2016 structure. The general trend in Havant Borough suggests the population is moving to an older emphasis.

90% (77% in both 2016 and 2013) of those interviewed said they lived in the Council area, with others also coming from relatively nearby (mostly PO postcodes with a few from GU and just one from London SE8).

All told us if they had made one or more trips by licensed vehicle in Havant in the past three months. 34% had not made any licensed vehicle trips. 33% had by either hackney carriage or private hire. 32% had travelled by private hire only and just 2% said hackney carriage. This total of 66% is marginally higher than the 63% of 2016 (which was higher than the 18% of 2013).

Of the respondents who told us they had used a licensed vehicle recently, all said how often they used a licensed vehicle. We have calculated the average level of licensed vehicle trips per month. On average, there are 1.3 person trips by licensed vehicle per month based on these assumptions (much lower than the 4.1 in 2016, but higher than the 0.95 in 2013). In this question, 23% said they never used licensed vehicles.

87% of interviewees told us how they obtained licensed vehicles in the Council area (the same proportion as in 2016). Some gave multiple answers. By far the highest percentage got taxis by booking them by telephone direct to a company (66% (42% 2016)), followed by an app (18%) with 4% saying they used a freephone, with the total by phone methods being 88% (70%, 2016). 6% (29% in 2016) said they got them from ranks and 1% said their normal method was hailing (same as in 2016).

The use of phones was queried further, seeking to understand the companies that people used. Across the full survey 159 people (67% of all respondents) suggested 194 mentions (175 and 275 in 2016) of companies. Overall, 3% of people quoted three companies, 16% two, and 81% one, suggesting very strong brand loyalty in the area, and an increase in this loyalty since the last survey (values were 10%, 37% and 53% in 2016).

In the latest survey, twelve companies were named. In 2016, there were just six different names given (and two of these had recently merged).

The top two named companies are the same as in 2016, although one has increased share from 41% to 51% whilst the other has fallen from 55% to 28%. Only one other national company was named both now and in 2016, although their share of mentions had risen from 1.5% to 2%, insignificant.

The third named company, with 10%, was not named in 2016. Similarly, the fourth, fifth and sixth companies now, with 4%, 3% and 2% of total mentions, were not mentioned in 2016. The last six companies named all only obtained a single mention each but again were not mentioned in 2016. There were two companies with small contributions in 2016 not mentioned now, one of which was thought then to be a hackney carriage operation.

A set of questions were then asked relating specifically to use of hackney carriages.

89% of those questioned provided hackney carriage usage frequencies – albeit a very high 55% (50% in 2016) said they could not remember when they had last used a hackney carriage. 17% said they could not remember seeing a hackney carriage in the area (increased from the 6% in 2016).

Looking at the usage percentages, the highest value was 10% for once or twice a year. Only one person said three or more times a week. 6% each said once or twice a month, 5% less than once a month but more than twice a year and 4% each said either once or twice a week or less than once a week but more than twice a month.

Overall, the number of trips per person per month from the stated frequencies of use of hackney carriages was 0.4 (same as in 2016), or 28% of that quoted for total licensed vehicles (up from 10% of 2016, which was the same in 2013). This is a much higher level than that quoted for ranks and hailing and may represent people recording bookings delivered by clearly hackney carriage vehicles as such in their usage levels.

People were asked to name all the rank locations they were aware of in the Council area and if they used the locations they named or not. 33% (84% in 2016) of people gave at least one answer. Of these, none (1% in 2016) gave three locations, 5% (21% in 2016) gave two and 95% (78% in 2016) named just one rank.

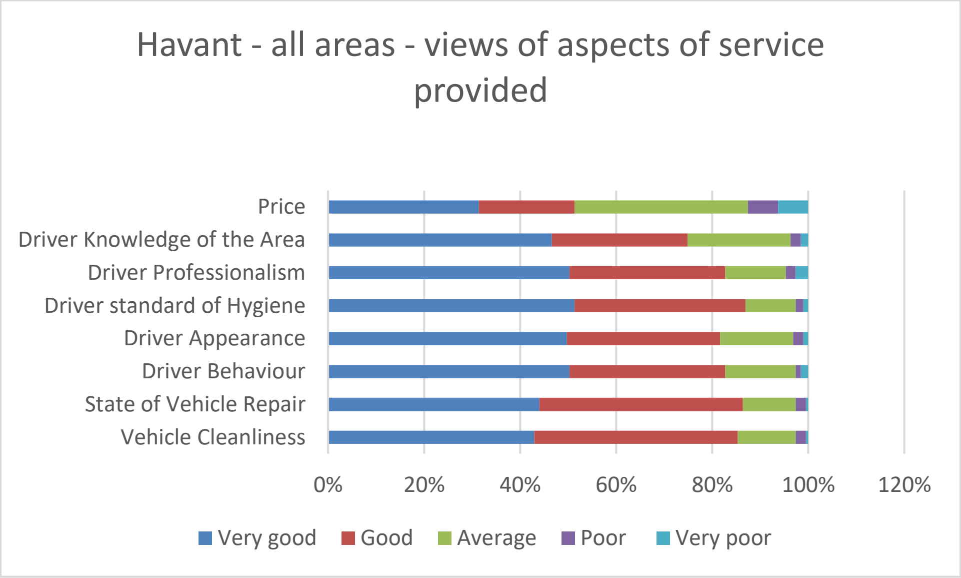
Of the 82 different mentions given (much less than the 206 in 2016), there were 10 different names (17 in 2016). Two of these were outside the area (Gunwharf, Portsmouth and Cosham High Street).

Top mentions were of Havant station, with 63% (80% in 2016), with Bedhampton station second with 15%. 12% named a range of locations in Waterlooville including 'rear of Asda', 'The Precinct' and 'Town Centre'. 5% said 'back of Greywell, Havant' (which is Leigh Park) and 2% said Leigh Park directly (8% 2016). In 2016 5% had mentioned Hayling Island.

Of all those responding, 80% said they did not use the sites quoted, with the remaining 20% saying they did use the ranks they had quoted. People only said they used Havant Station (21% quoting it said they used it), Bedhampton Station (17%), Leigh Park (both people quoting it), and "Waterlooville" (one of the two people that quoted that location).

This suggests a very large drop in peoples' interest in ranks around the area. However, there was limited quoted usage of Leigh Park as well as an undetermined location in Waterlooville. Bedhampton station was also mentioned as being one site used (not mentioned at all in 2016) albeit being known about by a lot more than used it.

81% of all respondents gave their views about a range of aspects of the licensed vehicle service, scoring from very poor to very good. The results are shown graphically below:



All but price saw the highest level of responses as 'very good'. The best level of 'very good' score, with 51% of responses, was for driver standard of hygiene. This was closely followed by 50% was for driver behaviour, driver professionalism and driver behaviour followed by 44% for state of vehicle repair and 43% for state of vehicle cleanliness.

As is usual, the worst score overall was for price, where 6% said this was 'very poor', 6% poor, 36% average, 20% good yet still 31% 'very good'.

There were only a very small number of 'very poor' scores although every aspect did score at least 1% as very poor. Good scores were generally the second highest level after 'very good'.

As is usual, more responded what would encourage them to use hackney carriages more – with 86% of all respondents giving an answer. 33% of those responding provided a single matter whilst 67% suggested two items. Of all responses, including those making more than one response, 38% were if they were more affordable, 25% said they would use hackney carriages more if they could contact them by phone. 11% said better vehicles, 10% better drivers, 6% said more hackney carriages at ranks and 3% if there was a screen between driver and passenger. A small 2.6% said nothing would make them use or increase their usage of hackney carriages. The most frequent pair of responses was more hackney carriages to phone for and if they were more affordable.

Compared to 2016, the dominance of the price issue was reduced (59% gave that response then). Wanting vehicles to phone had also moved up the importance list to second compared to there being more per se in 2016 (17%).

63% of all respondents told us if they thought there were enough hackney carriages in the Havant Borough area. 89% felt that there were.

People were asked if they or anyone they knew had a disability needing either a wheel chair accessible licensed vehicle, or a vehicle adapted in some other way. Almost all responded. 93% (exactly the same as in 2016) said they did not need, nor were aware of anyone, who needed a disabled friendly vehicle. For this survey, 7% said they needed a WAV and none any other adaptation whilst the split was more equal between these options in 2016.

Of those answering if they had ever given up waiting for a hackney carriage, 95% responded. 12% said they had. This is reduced from the 17% of 2016. However, only 38% of this percentage named Havant rank (in 2016, 81% named the station rank) – with others naming unused ranks or other locations that would rarely see hackney carriages. For those saying what they did next, the top response was making a booking, followed by walking away and hailing, getting a bus, walking and phoning a friend.

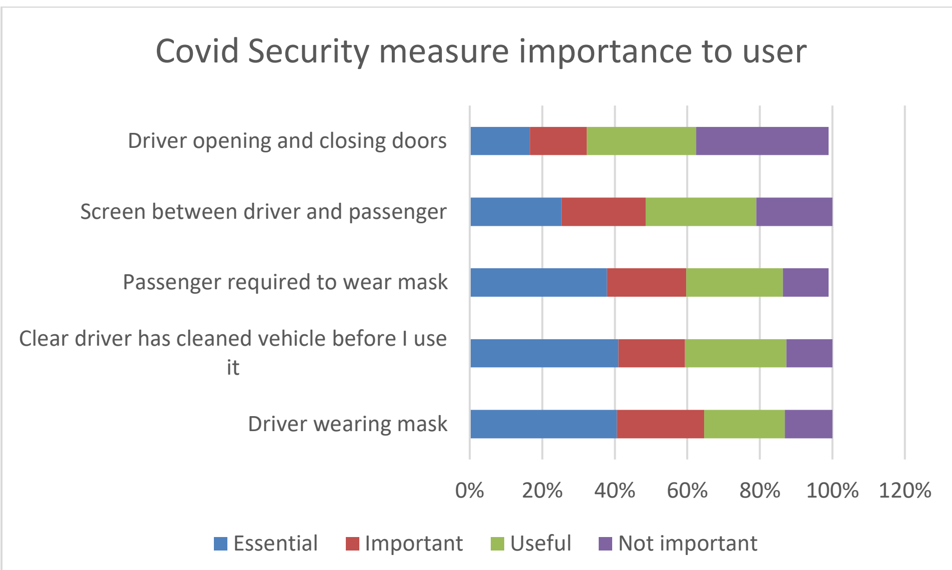
Using only the Havant rank numbers, this suggests a latent demand value of 1.042, reduced from the 1.135 of 2016 but higher than the 2013 value which saw no passenger quoting they had walked away from the station rank, and just one who had walked away after waiting at Leigh Park rank.

People were asked about how their usage of licensed vehicles had change with the pandemic. 93% responded. Many made two responses, one each for private hire and hackney carriage.

Of the total responses, the highest proportion, 57% said they actually used both kinds of vehicle about the same amount. 1% said they used hackney carriages more but 19% said less, a net reduction of 18%; whilst for private hire the values were 3% and 17%, a net drop of 14%. Some confirmed they did not use them at all.

Asking people to think beyond the pandemic, the same question saw a similar 57% using both about the same, 1% using hackney carriages more (but 19% less), and 2% private hire vehicles more (but 19% less). The net impact in the future is therefore 18% less for hackney carriages and 17% less for private hire, a continued reduction.

The final question asked people what COVID-19 measures people felt were important to them. Nearly all interviewees gave a response. This was made at the time when there was no legal requirement for mask wearing although local requirements may have differed. Interviews were well before the current new variant arrival and return of more mandatory mask wearing in general. The chart below shows the results:



This shows that the driver wearing a mask is most important, followed by it being clear the vehicle has been cleaned before people use it, and by passengers being required to wear masks. The screen is less important, with drivers opening and closing doors least important. These views may now have changed given the further relaxation of restrictions.

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5 Key stakeholder consultation

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

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

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

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

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

Where the statistical analyses in Chapter 2 demonstrate low levels of wheelchair accessible vehicle (WAV) provision, an increased emphasis will be given to the issue in terms of the focus of stakeholders but also in specific efforts to contact disabled users and their representatives. However, it must be remembered that none of our consultation is statutory and for cost effective and fixed budget reasons we limit our attempts to contact people generally to a first attempt and reminder. Unfortunately, changes already afoot towards changes in how people can contact key stakeholders were exacerbated by the pandemic. This has resulted in most public-facing personnel being redeployed to servicing face to face issues.

For example, supermarkets now rarely have staff able to answer general queries. Most phone links direct you to frequently asked question responses (FAQ), chat bots or distant representatives. The move for pubs and clubs towards reaction by social media has also accelerated. However, this has also allowed some to respond more honestly but only if done anonymously.

The council helped us to identify a larger group of potential key stakeholder respondents. Contact details were identified, and attempts made to obtain views using phone, email, contact forms and social media. An on-line questionnaire was set up and promoted by social media.

For Havant Borough, use of the general on-line survey sponsored on social media led to 15 responses that the on-line software summarised. Responses cannot readily be differentiated between type of respondent. However, the survey had been placed on the Pubwatch sites for the area who have 51 members and it appears many of these responded.

This found for the key stakeholders responding overall, 67% had customers or staff who used local taxis, with one response saying they considered their customers flagged vehicles down.

When asked how people would obtain the local taxis they used, 58% said from a rank, 25% using their own mobile phone, 9% using the stakeholder's phone and 8% using a freephone provided on the premises.

87% were aware of ranks customers or staff might use. 60% did not get any complaints, with 40% doing so, but with no further detail given. The only further comment made was a need for more taxis, and for priority taxis for their staff.

Supermarkets
No response was received from any specific supermarket.

Hotels
None of the hotels contacted made any comment.

Public houses
There were no specific pub responses made.

Night clubs
No direct response was made by any club in the area that had been approached.

Other entertainment venues
No response was made.

Restaurants
No response attributed to any specific restaurant was made.

Hospitals
The local hospital made no comment.

Police
The police provided no comment.

Disability
Several groups were contacted but had no comment.

Rail and other transport operators
No comments were received.

National rail statistics are made available normally in mid-December each year covering the rail year ending in March of that same year – a significant lag but necessary due to the way the data is collected and verified.

For the 2022 data, there were 2,568 stations reported with information. Havant station flows for that year put it 239th highest amongst this list.

Rail year (ends March in last year noted)	Entries / exits	Growth / decline
Havant (SWT) (239th)		
1997 / 1998	1,447,312	n/a
1998 / 1999	1,502,539	+4%
1999 / 2000	1,622,322	+8%
2000 / 2001	1,700,799	+5%
2001 / 2002	1,771,919	+4%
2002 / 2003	1,830,202	+3%
2004 / 2005	1,911,821	+4%
2005 / 2006	1,943,917	+2%
2006 / 2007	1,918,386	-1%
2007 /2008	1,995,906	+4%
2008 / 2009	2,184,698	+9%
2009 / 2010	2,124,274	-3%
2010 / 2011	2,153,160	+1%
2011 / 2012	2,045,494	-5%
2012 / 2013	2,152,396	+5%
2013 / 2014	2,203,114	+2%
2014 / 2015	2,351,802	+7%
2015 / 2016	2,375,640	+1%
2016 / 2017	2,233,776	-6%

2017 / 2018	2,197,694	-2%
2018 / 2019	2,326,412	+6%
2019 /2020	2,240,562	-4%
2020 / 2021	681,628	-70%
2021 / 2022	1,630,652	+140%
Compared to 15/16	-31%	
Peak was 15/16		
Est weekly dep		16,307
HCV share		7%

Note- share for hcv 9% in 2016 and 2013 and 10% in 2003.

The other stations are much smaller in patronage terms:

Emsworth: 280,736 (940th)

Bedhampton: 86,884 (1,597th)

Warblington: 19,292 (2,166th)

Havant and Bedhampton are operated by South Western Railway at this point in time, with Emsworth and Warblington operated by Govia Thameslink / Southern.

Other council representatives

No other comments were received.

6 Trade stakeholder views

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

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

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

Some authorities cover private hire by issuing the letter and questionnaire to operators seeking they pass them on when drivers book on or off, or via vehicle data head communications.

In all cases, we believe it is essential we document the method used clearly and measure response levels. However, it is also rare for there to be high levels of response, with 5% typically felt to be good and reasonable.

For this survey, the licensing authority issued the link to the survey to both hackney carriage and private hire drivers, and reiterated this a number of times.

The 2022 all-driver survey resulted in a total of 15 responses. This was less than the 20 of 2016 and the 21 of 2013 but still of the same order of magnitude.

80% were those stating the licensed vehicle trade was their only or main source of income. The remaining 20% were working part time with other additional sources of income. A third of respondents were hackney carriage and two thirds private hire. This is a continuing decline in the proportion of hackney carriages responding, with 77% in 2013 and 55% in 2016 but an increasing level of private hire respondents.

40% had worked one to five years, 20% 11-15, 13% each 6-10 and 16-20 and 7% each 21-25 and 31-35 years in the industry. The average was 11 years and the maximum 35 (15 and 40 in 2016, reflecting the national trend of many retiring). 2016 and 2013 had been similar results. The average for the five hackney carriage drivers was much higher at nearly 20 years compared to seven for the private hire.

As might be expected, the main focus of work for the hackney carriage respondents was from ranks, and for private hire from bookings, with one saying from future bookings with the remainder saying immediate bookings.

Of all those responding, the largest proportion, 60% (30% in 2016 for each of six and seven days) said they had worked six days. 13% each had worked either five or seven days, and 7% each had worked either two or four days. This provided an average of 5.6 days per driver, 5.4 for hackney carriages and 5.7 for private hire.

The overall average hours worked was just under 49 hours per work (54 in 2016) although the most hours quoted worked was 85 (lower than the 92 quoted in 2016). The hackney carriage average was 40.8 and the private hire 52.5.

This suggests people are generally now working less hours than they were in 2016, and over less days. This actually continues a trend from 2013.

80% of respondents said they owned and drove their own vehicle (85% in 2016, very similar). No respondent now said someone else drove the vehicle that they drove at another time with 15% saying this had changed due to the pandemic, i.e. people were no longer sharing vehicles. This was against the trend that saw growing sharing of vehicles from 2013 to 2016 (14% to 20%).

All five hackney carriages said the only rank they used was Havant Station, as in 2016. 60% of hackney carriages obtained phone bookings direct; with a further driver saying they got return journeys booked. Four private hire got bookings through their office, three via an app and one via phone or email.

60% of the hackney carriages said the main reason affecting when they worked was when the rank was busy. For private hire, one worked when asked, another worked busy times, one avoided busy traffic times, another avoided disruptive passengers, one worked nights as they saw too many out of town vehicles working daytimes, and two worked to meet family commitments.

When asked how often they had customers needing to travel in a wheel chair in their vehicle, 20% said daily, 10% each said twice a week or weekly, 20% monthly and 10% each for three monthly, six monthly or yearly. Two thirds of respondents answered this question. Just under half responded to the question about wheel chair users who asked to transfer. 29% each said daily or monthly and 14% each for twice weekly, weekly or fortnightly. This sample suggests there are around 75 wheel chair and 75 wheel chair transfer trips made by our sample each month. However, inspection found the hackney carriage element quoted only 18 wheel chair jobs from a rank by hackney carriages with a further yearly, and just one fortnightly transfer job.

All but one of the respondents told us if they were aware of drivers who had given up working due to the pandemic. 71% said they had. Of these, a third said they knew two drivers, 22% said four and 11% each said one driver, five, six or twenty drivers.

All the hackney carriages and 40% of the private hire said they thought there were enough hackney carriages in Havant at this point in time.

Two hackney carriage drivers explained why they thought the limit benefitted the public – one saying it was important for viability of the trade and another that it maintained the service. One said the limit made no difference to public service whilst another pointed out there were spare hackney carriage plates at this time. Only one private hire gave a suggestion that the limit reduced pollution, with one being unsure, and another two saying they did not think there was any public benefit

Few responded to the differences between pre-pandemic and now, with all those responding saying there were less trips now.

However, more made comment in general. In terms of impact of the pandemic most said at first there was no demand, but that overall now it felt as if demand was about half, although some confirmed demand was developing.

There was not a great amount of optimism with several saying they did not expect any return to pre-pandemic demand. However, one driver said that they were now turning away passengers for the first time in the fifteen years they had been operating. One respondent suggested one private hire company had 250 vehicles it could not find drivers for and that several hackney carriages had now joined a private hire company servicing airport demand and relinquished their station permits.

One driver made a number of comments regarding day time incursions of out of town vehicles, believing that they all went to Portsmouth at night.

7 Evaluation of unmet demand and its significance

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

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

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

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

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

Until the outset of the coronavirus pandemic, the main change in the balance between the various factors impacting customer service was related to increases in passenger demand arising from changes such as opening of new clubs or new developments. Other changes might include rank movements or closures, or changes in road network operations.

Supply side changes were mainly related to competition factors such as introduction of apps or other active competition from private hire operations.

All of these were relatively known impacts and generally left the industry more or less stable, albeit probably well over-provided with vehicles and drivers compared to demand. On this basis it was relatively easy to identify if the changes occurring meant that more vehicles were needed to meet demand or not, generally over the last ten years or more, the trend was reducing hackney carriage demand and therefore excess vehicle supply.

However, with the pandemic, a lot more has changed. Initially, many drivers felt their health was threatened by the potential of catching the virus. Fears grew as evidence mounted that many licensed vehicle drivers were catching the virus in their vehicles. As time moved on, more concern arose from drivers no longer able to earn given the significant drops in passenger demand. Some areas were affected more than others, with some shift from people that remained active using bookings rather than risking turning up at ranks. In more recent times, many drivers have reviewed their options and found other more preferable ways of earning a living, such as delivering food or parcels.

All these impacts have meant the current situation for reviewing unmet demand needs to consider a much broader set of both supply and demand factors to determine if the solution to observed reduced levels of service to the public requires adding more vehicles to the fleet or not. The answer is nowhere near as clear cut as it has been in the past.

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. If this value is less than a minute, this factor acts to dampen any unmet demand. If the value is over a minute, unmet demand impacts are increased as the average delay increases.

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. This factor typically takes two principal values that impact on results. If demand is expected to be high due to the season, unmet demand needs to be dampened, using a factor of below 1 (usually 0.8). On the contrary, if demand is low, unmet demand is per se less likely, so this factor needs to be over 1 to inflate the measured impact (typically 1.2).

For clarity, 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 (factoring high demand level impacts down) to 1.2 for January / February (inflating the values from low demand levels upwards).

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. This has the impact of halving the overall level of unmet demand if flows are counted to be peaky.

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). It only has minor impact on the overall result but is always an inflationary factor (unless no latent demand occurs, in which case the value is 1.0 and irrelevant).

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 and needs to be taken fully in context.

For this survey the results of the formal test of significance of unmet demand (the Index of Significance of unmet demand, ISUD) are presented in the Table below, together with previous results to provide context.

Element	2022	2016	2013	2009
Average wait (mins)	2.2	0.35	0.8	
Peak factor	0.5	1	1	
% Queues in weekday daytime hours	37.5	25	0	
% pass in hours with waiting over 1 minute	39.34	28	10	
Latent demand	1.042	1.135	1.05	
Overall index	1691	278	Zero	

As noted above, it is usual for ranks where there are supplementary restrictions, such as having to pay for permits, to be excluded in considering unmet demand and its significance as adding extra plates could not be guaranteed to add extra vehicles to such locations. Havant Station requires such a permit, but there is no other active rank in the Borough.

The situation has worsened significantly since the last survey. However, despite longer waits, people have increased confidence they will get a vehicle if they wait at the station rank, shown by a strong reduction in the latent demand value. However, there was high quoted latent demand for hackney carriage service in other parts of the Borough.

The key question then arises if adding more vehicles could lead to an ability to reduce this level of unmet demand below the value of 80 that is take in industry standards to show unmet demand is not significant. The values suggest that overall service and length of delay have worsened. This is discussed further below in the synthesis section of the report where other observed changes are drawn together to make a holistic decision.

Again it should be noted that the current trend is one that had already begun from 2013 to 2016 and if anything has only been exacerbated by the pandemic, not caused by it.

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8 Summary, synthesis and study conclusions

This Hackney carriage unmet demand survey on behalf of Havant Borough Council has been undertaken following the guidance of the BPG and other recent case history regarding unmet demand and its significance.

Background and context

The database of information for this survey was gathered during the period from February to July 2022. The delay in reporting has arisen from changes in structure and personnel at the authority.

The limited number of hackney carriages have fared better than the private hire vehicle numbers although it is understood four plates are spare and that other hackney carriages no longer service the only rank at Havant station but service bookings. Private hire vehicles at the time of the survey were just 57% of their peak with drivers 68% of their peak – significant drops in numbers. Operator numbers have also been affected. The impact on WAV proportions has been perverse in percentage terms although the reduction in WAV numbers seen in other places as a reaction to trying to cut costs does not appear to have occurred.

Rank observations

There remains just the one station rank active across the full licensing area. 2022 passenger usage levels are under half those of the previous survey. This is a greater reduction even than the observed level of rail usage reduction (latest data suggests the passenger flows are 31% down comparing year ending March 2022 with year ending March 2016). Further, the number of hours with no passengers from the rank has gone up from four in 2016 to twelve now. Further, the occupancy of vehicles has marginally increased and we saw some evidence of hackney carriages providing booked trips.

Despite overall reduced passenger numbers the level of vehicle activity from the rank observations appears increased in terms of frequency of visits by vehicles overall (from the full rank operation data). The level of empty departures is also reduced. The overall number of active vehicles observed in the plate samples is only marginally less (53% of fleet compared to 54% in 2016, although the current fleet is smaller by the four plates not on issue).

Interestingly, comparing 2016 to now only nine plates observed then were observed in 2022.

What is more telling is that the focus of activity by plates now appears to be more strongly reduced on the Fridays and Saturdays suggesting drivers appear able to earn a living during the week, not needing or choosing not to work what can be the more difficult hours. This is, however, not a totally new issue, as 2016 had already begun to see reduced vehicle operations on Saturday nights.

However, queues of people have now extended from the late-night Saturday to begin from 18:00 on that day continuing to the end of the rail service. Wait times have also increased. But latent demand has actually decreased, so people appear generally happy to wait and confident they will eventually get a hackney carriage.

There has been an impact from the pandemic in that abuse of the rank-only part of the car park appears to have grown significantly. This is a national issue.

Although the proportion of vehicles observed at the rank saw a similar level of WAV to the numbers in the fleet, there is still no observed usage of the fleet by people in wheel chairs and this time even those needing assistance were reduced to zero from a relatively high level in 2016.

The overall demand profile of passenger numbers is a very saw-tooth profile arising from the rail timetable and no other demand generators. This is worsened by several times in the hour seeing trains in either direction arriving at the same time. These issues conspire to make servicing such demand very difficult. Average flows are very low, rising from 9 per hour on Thursday to 12 per hour Saturday.

On street public views

Public views were obtained for this survey in Havant, Leigh Park, Emsworth and Waterlooville. The sample this time saw a higher level of local people interviewed (90% compared to 77% in the two previous surveys).

The on-street public views found a marginally increased level of 66% of people saying they had used a licensed vehicle in Havant Borough in the three months before the survey (was 63%). Overall usage at 1.3 licensed vehicle trips per person per month was also low, reduced from 4.1 in 2016, and reducing further to 0.4 trips by hackney carriage. 23% of respondents said they never used licensed vehicles; 55% (50% 2016) could not remember the last time they used a hackney carriage and 17% could not remember seeing one in the area (6% in 2016).

For this survey an increased 66% said they got licensed vehicles by phone (was 42%), with a further 18% by app. Quoted obtaining vehicles from ranks had reduced from 29% in the last survey to just 6% now.

For those phoning, there seems very good level of satisfaction with the company chosen, increased from 53% last time to 81% this time just quoting a single company name. There seem to be more companies overall now (12 quoted compared to six in 2016).

Although the absolute number of people responding to the question was strongly reduced from 84% in 2016 to 33% in 2022, there were still ten different locations quoted (17 in 2016). Two were outside the area, 63% were Havant station (was 80%) 15% Bedhampton station, 12% various places in Waterlooville and 7% Leigh Park (similar to 8% in 2016). However, only a fifth naming ranks said they used them although this did cover all four named above seeing some usage. This suggests people are either getting hackney carriages responding to bookings, or that they think booked vehicles from one place are hackney carriages.

Satisfaction with the hackney carriage service was generally ‘very good’. The largest issue was driver knowledge of the area although not at a significant level. The main issue that would increase hackney carriage usage was if they were more affordable, followed by ability to contact hackney carriages by phone, better vehicles and better drivers. Just 6% said if there were more hackney carriages at ranks. The issues of affordability had reduced in overall importance since 2016.

89% of those responding felt there were enough hackney carriages in the area.

In terms of requirement for WAV style vehicles, exactly the same amount said they needed them or knew anyone who did, although the focus for those needing a vehicle was on WAV, very different to 2016 when the split between WAV and none-WAV was more equal.

Latent demand has decreased since 2016. This was even more true when the rank locations quoted which we know are not used by hackney carriages were discounted. This does provide some evidence, however, that people expect to see vehicles waiting in the streets although most would book.

Compared to pre-pandemic people considered their use of both hackney carriage and private hire had reduced, and they expected that reduction to continue, although in both cases 57% said usage was and would be similar.

In terms of COVID security, drivers wearing masks was felt to be most important, followed by it being clear the vehicle had been cleaned and passengers being required to wear masks. It should be remembered this question was at a time when mask wearing was no longer mandatory in general.

Key stakeholder views
With assistance from the Council some 15 key stakeholders responded although it was not possible to understand which groups they represented, although it appeared most were from the licensed drink trade. Two thirds said their customers used local licensed vehicles. 58% said customers would use ranks and 87% were aware of ranks that might be used although they did not specify where.

No response was received from either rail company involved in stations in the area.

Trade views
The all-driver survey did not provide a high level of response, but in the same order of magnitude of previous years (15 compared to 20 and 21 previously). 80% said the licensed vehicle trade was their only or main source of income. Two thirds of respondents were private hire.

Average length of service and maximum lengths were both reduced (15 to 11 and 40 to 35 respectively). Extent and length of the working week had reduced giving less hours worked generally over less days. Again, this is not a new but a continuing trend since 2013. There was a reduction in sharing of vehicles.

80% said they owned and drove their own vehicles. 60% of the responding hackney carriages said they also took phone bookings direct.

The only rank used was the Station rank. The principal reason when people worked was when the rank was busy.

The level of hackney carriages providing wheel chair service amounted to about 18 per month whilst more private hire quoted such jobs, about half of which saw people transfer from their chairs.

71% were aware of drivers that had left due to the pandemic.

All hackney carriages and 40% of private hire felt there were currently enough hackney carriages in the area.

Comment was made about daytime out-of-town vehicles from a long distance away.

Formal evaluation of significance of unmet demand

The formal evaluation of unmet demand, using the industry standard index of significance of unmet demand (ISUD), was undertaken as a pointer determined from key elements of the rank and on street surveys. For Havant Borough at this point in time in 2022, the results showed a worst case value of 1691, well over the cut-off of 80 that signifies unmet demand exists and is significant.

All but two elements of the index have worsened since 2016. Average wait is now 2.2 minutes; both the percentage of queues in weekday daytime hours and the proportion of passengers travelling when average waiting time is over a minute have also increased. However, latent demand has reduced and the peak factor is now active given it is the relatively higher Saturday flows that are principally (but not exclusively) feeding the index level.

It must be pointed out, however, that the last survey had seen a similar trend against service of late Saturday night demand, but as already explained above this has worsened further.

Whilst it is true that ranks with extra permits are normally excluded because the authority cannot control vehicle numbers, in this case it is believed that spare permits do exist but are not being taken up. Further, spare plates are available but also at the time of the survey were not being taken up.

Synthesis

The licensed vehicle situation in Havant Borough has continued its trend towards focus on only one rank and reduced levels of vehicles servicing the late night Saturday economy. Although the pandemic has strengthened this trend, the issue was already developing in 2016. A big part of the issue is the overall low demand for hackney carriages at the station rank, and even more so across the full licensing area. The cost of the additional station permit compared to remuneration is also now hindering, but the Council has no control over this at all. This has led to hackney carriages seeking work from private hire circuits and other methods to supplement what would otherwise be a poor income. The station rank demand, even before the pandemic, could not really support 40 vehicles.

During the pandemic demand at the station would have plummeted (formal statistics suggest 70% reduction in the first year, but 140% regrowth in the year after, taking levels at the time of the survey to around 73%, with the overall decline 31% since the last survey, forcing those hackney carriages still working to further seek other work. At the same time, the previous decline in private hire was exacerbated, providing an opportunity for hackney carriages to take up the slack with operators. This will have increased the work rate for hackney carriages and made them less dependent on the late night and weekend work that has primarily been met by them for many years. This would have been strengthened by the former very strong application of the permit system at the station favouring their operation.

Conclusion

The developing issue of too few hackney carriages making themselves available to service the Havant Station rank at times of highest demand has now become severe. It is, however, a difficult issue to resolve as there is no way any licence holder can be required to service particular times. A hackney carriage operator (often one man operations) needs to make sufficient living to support the vehicle. The single station rank has never really provided enough patronage so most hackney carriages have needed booked work for many years (this was evident in 2016).

The question has to be asked if issuing more plates might resolve the issue. Given that there are at least four plates spare it is unlikely anyone is seeing any economic case for obtaining them. The current level of overall demand is very low and further plate issue might well lead to some current holders deciding their remaining in the industry was no longer viable, a very poor result for passengers. Removing the limit may have the same impact as the potential plate value may well be one of the last few benefits of having a hackney carriage plate.

It should also be noted that the index of significance of unmet demand does not just focus on peak times although the issues during daytime hours seem more related to the sporadic timing of demand arising from unequal gaps between train arrivals. There are daytime service issues too.

There could be scope for reviewing with currently active drivers if increased fares from 18:00 Saturday night might encourage more to service those times. At present, passenger response appears to be willingness to wait knowing they will get a vehicle, but it is not clear how long people will continue before they seek other alternatives that might worsen the overall demand for hackney carriages here.

It may also be prudent to review how and who might receive opportunity to take up the licences that remain spare. Or identify a way by which the licences on issue but not used at the station rank might be encouraged to service the station particularly at times identified as with shortage – principally Saturday evening.

It is of note that the overall number of drivers involved in meeting demand is relatively small so there may be potential for a round table discussion about the issue to identify with them potential options. The fact that issue of a hackney carriage plate is for benefit of the public in the area at ranks is a matter that needs to be reiterated – although it may be important to understand clearly from each owner why they own a hackney carriage plate and not a private hire one (e.g. status value, no need to be an operator, ability to respond if hailed, etc).

The option to increase or remove the limit could be used were all other options to prove fruitless, but experience suggests the churn in the market this option increases can take many years to work through to public benefit. Finding quicker wins would be much better – and in fact is essential for the future of the licensed vehicle trade in Havant.

9 Recommendations

On the basis of the evidence gathered in this Hackney carriage unmet demand survey for Havant Borough Council, our key conclusion is that there is no evidence of any unmet demand for the services of hackney carriages either patent or latent that could be resolved by the issue of further hackney carriage plates at this time.

The committee is therefore able to choose to retain the limit, at the level of active plates at the time of the survey, and would be able to support this decision if necessary.

Consideration of night fares and how redundant or non-used plates need to be given. If possible, the rail operator needs to be made aware of the issues at the rank and the risk that a hackney carriage service might not remain viable moving forward.

The most expedient options to improve public service would be working closely with the current trade in the area to identify practical and quick win solutions using the observed data from the rank operation as a base. The committee would need to ensure the licensing section had delegated powers and ability to undertake this promptly.

This would need a much more detailed and focussed driver survey method than the standard normally used for a hackney carriage demand survey. This may involve specific contact with each owner and careful, clear and frank discussion.

It is also imperative that the next scheduled survey, with rank work no later than March 2025, should occur unless policy or other changes revise the requirement.

There could also be a case for earlier review given the need to demonstrate that any changes made have provided benefit to the public promptly. That would need the rank observation survey and plate recording undertaken over three days but would not need any other elements of the normal demand survey (e.g. no need for on-street interviews or discussion with any key stakeholders, apart perhaps from the station operator).