LVSA

Birmingham City Council

August 2017

Hackney Carriage Unmet Demand Survey

Executive Summary

This Hackney carriage unmet demand survey has been undertaken on behalf of Birmingham City Council following the guidance of the April 2010 DfT Best Practice Guidance document, and all relevant case history. This executive summary draws together the key points to allow the Committee to determine its view regarding retention, or otherwise, of the current moratorium on hackney carriage plate issue. It is not meant to replace consideration of the full main document.

The latest review of the moratorium policy was undertaken from March to August 2017. The moratorium was applied in 2008, since when hackney carriage plates on issue have reduced from 1,466 to 1,219, a 17% reduction with most occurring in the past year. Private hire vehicle numbers, which cannot legally be limited, have only grown marginally since the last survey whilst driver numbers have fallen only showing increase in the very latest year. Operator numbers have generally also fallen again until the latest year.

A robust sample of 263 hours of rank operation were observed by video methods. This also included observing any abuse of ranks by private cars or other licensed vehicles. It found two people using wheel chairs to access hackney carriages at ranks, with 14 others who appeared to have disabilities not needing a wheel chair.

Overall hackney carriage demand has reduced 6% at ranks since the last survey. This is in spite of significant increases of use between the two station ranks – seeing increase more than double the increased level of rail passengers. The two station related ranks between them take 45% of all estimated passengers in a typical week. Broad Street is next largest with 8% of passengers. There are 26 active ranks in total (excluding the Airport), most of which enjoy good, very good or excellent service to those using them.

On the busiest day, demand was met by around 21% of the fleet active. Allowing for other factors, it still suggests the fleet could be 25% smaller and still retain spare capacity for expected growth.

291 on-street interviews suggested increased overall usage of licensed vehicles including hackney carriages in total. However, there were very clear changes even in private hire company fortunes, with many new entrants or many that had reacted to new demand positively, and others that had very clearly lost their market share. Hackney carriages are very visible across the city, but remain less used by people. Rank knowledge is good, but could benefit from better information and publicity. Latent demand was not particularly high.

Key stakeholders as is typical around the country mainly used private hire or phoned for services, but many were aware of ranks. A key police concern was continued reduction of out of town vehicle activity and need for an all-trade rank review. The view from those with disabilities was positive.

The trade survey and trade consultation found high support for retaining the moratorium, even from private hire elements of the trade. The hackney carriage trade had retained its high level of access by phone, but still obtained a high proportion of work from ranks.

Neither with industry standard use of the "index of significance of unmet demand" tool, nor from any other evidence gathered, is there any unmet demand for hackney carriages which can be counted significant in terms of the 1985 Transport Act Section 16. The survey therefore supports the conclusion that the moratorium can be retained and defended if necessary.

The City of Birmingham retains an active fleet of hackney carriages across the city and at ranks, by hailing and by phone. Despite overall increases in usage of licensed vehicles, rank usage is down since the last survey, as is demand for some private hire companies, although others have clearly grown or entered the market and achieved good levels of growth. Birmingham has not seen reduced off-peak service as many other areas have, partly due to the long term existence of the radio aspect of the hackney carriage trade which remains competitive in that part of the market.

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1 General introduction and background

Birmingham City Council is responsible for the licensing of hackney carriage and private hire vehicles operating within the Council area and is the licensing authority for this complete area. It retains a limit on the number of hackney carriage vehicles licensed. This is the only part of licensing where such a stipulation occurs and there is no legal means by which either private hire vehicle numbers, private hire or hackney carriage driver numbers, or the number of private hire operators can be limited. After removal of the limit, a moratorium on new plates was put in place in 2008. Prior to this survey, previous tests of the validity of the limit and its level were undertaken in 2014 and 2010.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

2 Local background and context

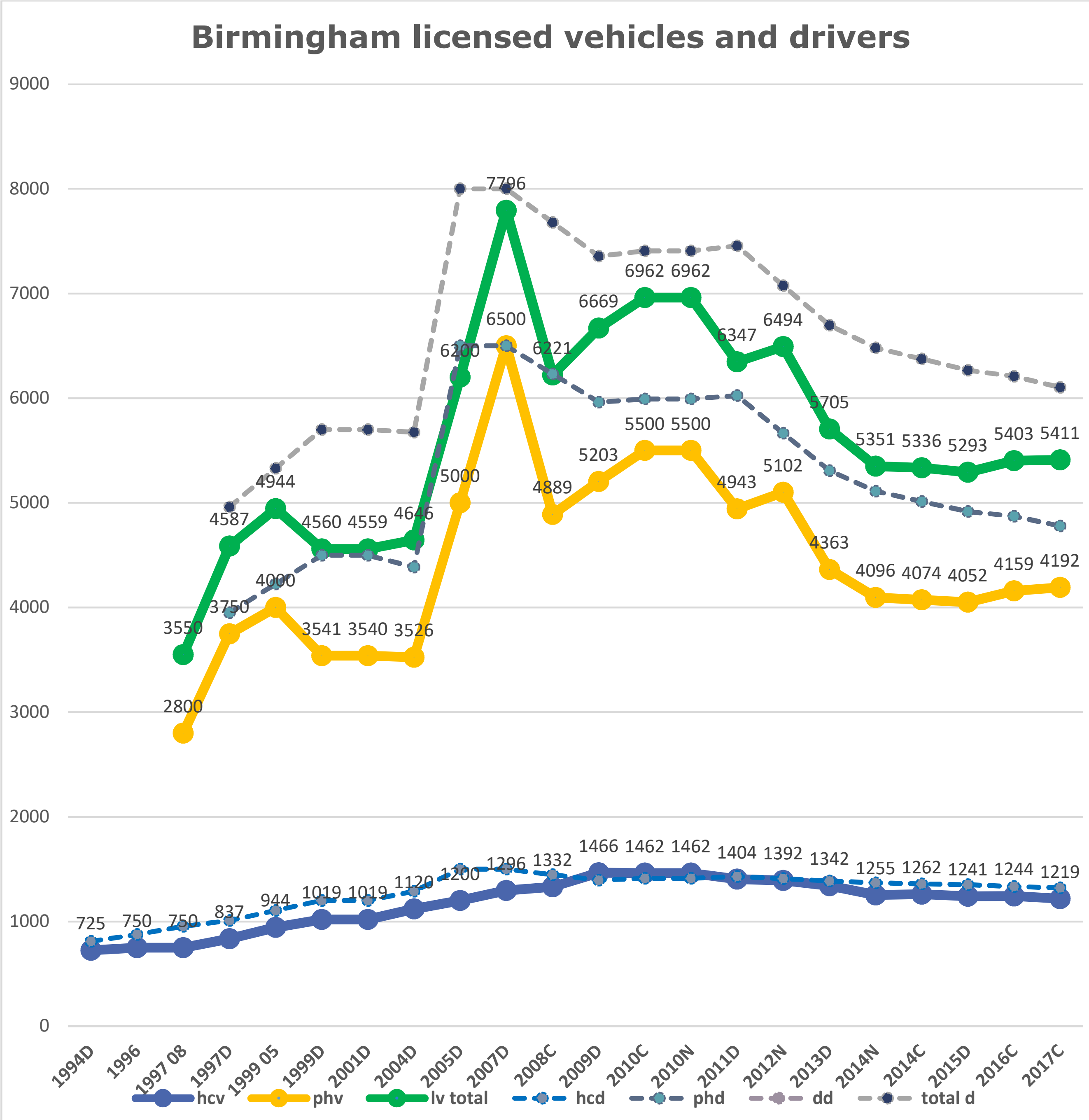
Key dates for this Hackney carriage unmet demand survey for Birmingham City Council are:

- appointed LVSA – a joint trading name of CTS Traffic and Transportation and Vector Transport Consultancy on 21st March 2017
- in accordance with our proposal of January 2017
- as confirmed during the inception meeting for the survey held on 6th April 2017
- this survey was carried out between mid-March 2017 and July 2017
- On street pedestrian survey work occurred in April 2017
- the video rank observations occurred in March 2017
- Licensed vehicle driver opinions and operating practices were canvassed by a survey sent out by the Council during April 2017
- Key stakeholders were consulted throughout the period of the survey
- A draft of this Final Report was reviewed by the client during July 2017
- and reported to the appropriate Council committee in early Autumn 2017

Birmingham City Council is a unitary authority. The authority has a current population of 883,200 using the 2017 estimates currently available from the 2011 census.

In terms of background council policy, Birmingham City Council has full control over all planning, highways and transport aspects, including provision of the ranks for the area (albeit within a separate section of the Council). Birmingham City Council has chosen to utilize its power to limit hackney carriage vehicle numbers, albeit with a moratorium on issue of any new plates from 2008 onwards.

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

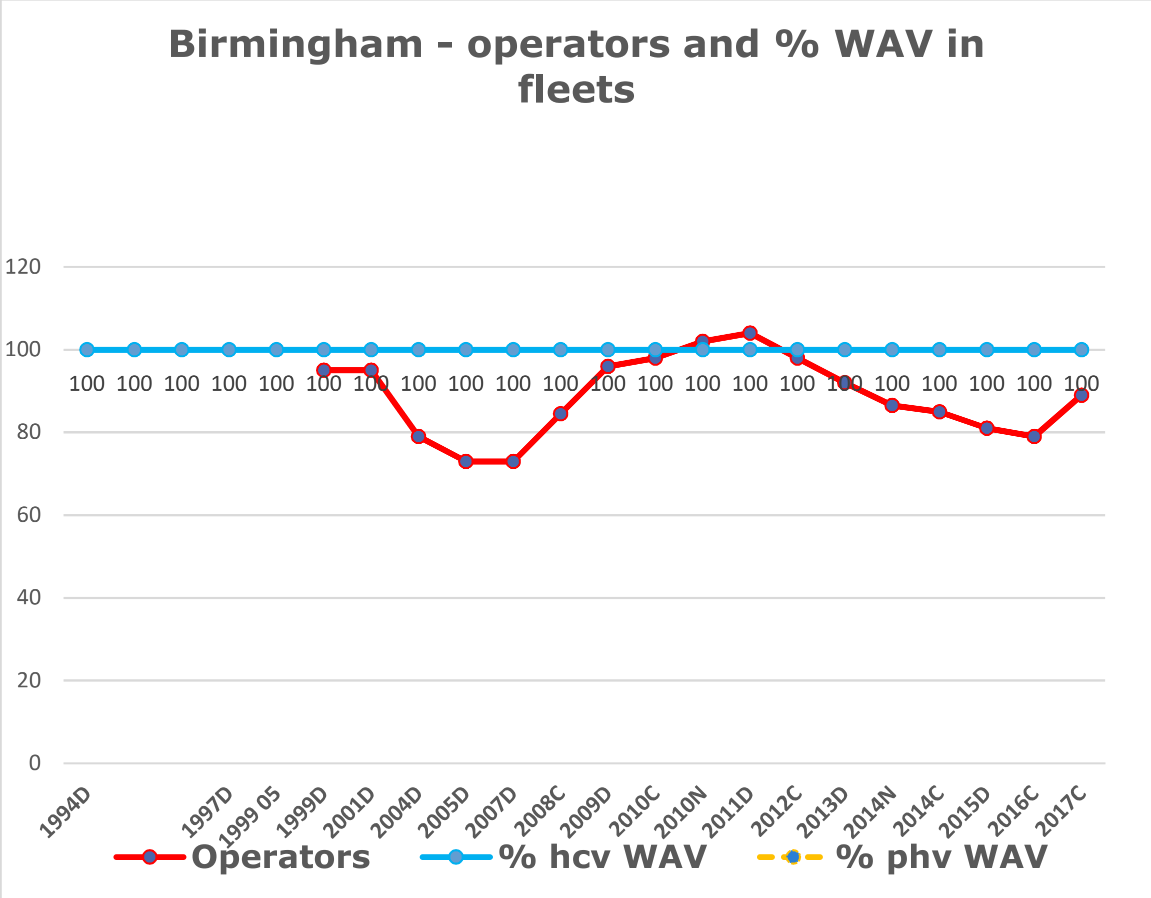


Licensing Statistics from 1994 to date

The graph firstly shows the disparity between hackney carriage and private hire vehicle numbers, although it also shows how this has reduced significantly since the peak of 2005. Hackney carriage peak numbers were 1,466 in 2009 once all the applications under way at the time of the moratorium had gone through. The current level of hackney carriages is now 17% lower than the peak level. The number of drivers is very similar, showing very little sharing of vehicles at all. The latest year has seen the largest recent reduction in vehicles.

In terms of private hire, the drop in numbers from 2005 onwards continued to a plateau around the last survey, but has shown some marginal growth in the last two years. Driver numbers however have continued to fall such that the number is now much closer to one per vehicle than it ever has been.

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



Operator numbers and levels of WAV provision in the fleet

The full WAV nature of the Birmingham hackney carriage fleet means there are no WAV in the private hire fleet at all despite its size and the fact many companies operate in the suburbs where there is less likelihood of obtaining hackney carriages. Operator numbers have reversed their downward trend in this last year, although there are still many less than the peak of 2011.

Birmingham City Council undertakes regular review of its policy to limit hackney carriage vehicle numbers in line with the BPG. The previous surveys were in 2014 and 2010.

3 Patent demand measurement (rank surveys)

As already recorded in Chapter 2, control of provision of on-street ranks in Birmingham City Council is fully under the auspices of the City, albeit via the highways section of the Council.

Our methodology involves a current review both in advance of submitting our proposal to undertake this Hackney carriage unmet demand survey and at the study inception meeting, together with site visits where considered necessary. This provides a valid and appropriate sample of rank coverage which is important to feed the numeric evaluation of the level of unmet demand, and its significance (see discussion in Chapter 7). The detailed specification of the hours included in the sample is provided in Appendix 2. A review of rank usage and issues at ranks was also undertaken with the licensing section of the local police force, with the dedicated staff member allocated (giving them a unique overview of hackney carriage, private hire and out of town operations across the City).

Since the last survey, there have been several major changes in the City Centre. New Street station refurbishment was completed and a new purpose built, but Network Rail operated (private) rank introduced effectively in the same location as before the refurbishment began. However, the Navigation Street rank remains and still sees significant use.

The tram system is now fully open through the city centre as far as New Street station. This has meant revision of the triangle of roads near to the Navigation Street rank meaning that the flow of vehicles on this section is reversed, with a feeder rank provided on this section, but never used. Feeders for Navigation Street now tend to be from the Mailbox direction with the changes in traffic flows from the Smallbrook Queensway direction. The former waiting area for the station is now built on, and the new station rank has on street feeders very similar to the situation before the station changed.

The other main revisions relate to the demolition of the Library in the centre of Paradise Circus. Road revisions have meant the former night rank in Summer Row has gone. The former Snobs rank remains, but is not used as the club has moved to another location.

Overview of rank observations

During the course of our observations of ranks, a total of 13,434 vehicle arrivals and departures were identified at or near ranks in the City. Of these, 10% were private cars at or near ranks, 10% were private hire vehicles, 1% were goods vehicles with the remaining 79% hackney carriage vehicles. A detailed review of rank abuse is provided at the end of this Chapter.

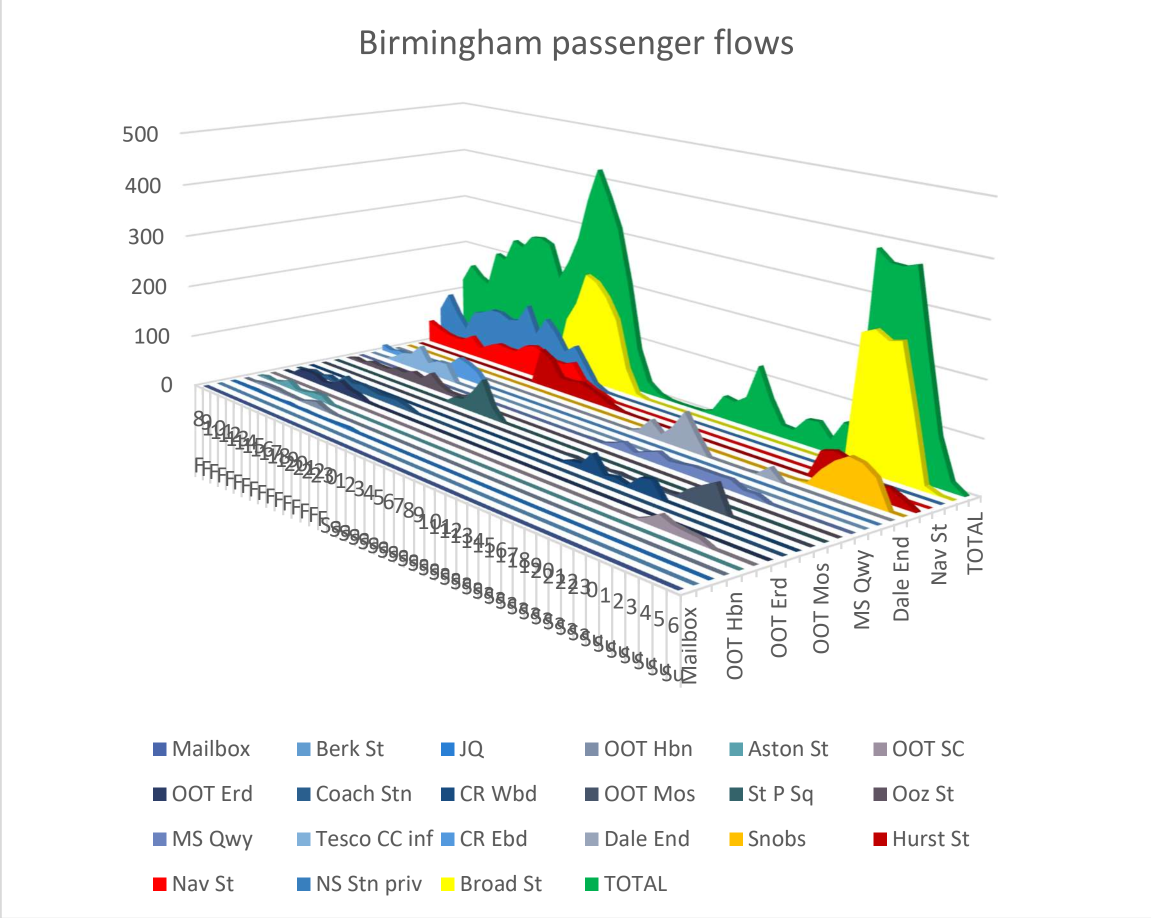
Compared to the previous survey when no persons in wheel chairs were observed getting hackney carriages at ranks, this time two were observed at the westbound rank on Colmore Row, and three at the new Station rank.

A further 14 people were observed who appeared to have disabilities – these were at a range of ranks with the most being seen at the Erdington out of town location.

There were no issues with equipment or road works during the course of this survey, with the full planned survey taking place resulting in the expected number of hours being obtained.

Overview of demand

To provide a general overview of demand, the actual observed passenger numbers from the survey were produced in graphical format. This is shown below. However, this has to be seen in the context that, with the large number of ranks to cover, only two were covered on both days, so the comparison needs to be between ranks on the day they were covered rather than across both days.



The graph does demonstrate that usage of hackney carriages tends to be focussed on a few key ranks, and on late evening demand, but that there are also a very good number of other ranks which are used, some over longer periods of time compared to the busier night ranks. There is also at least one key location which is not formally a rank but which is making a very clear contribution to people getting hackney carriages in the city centre.

However, the late evening peaks tend to be over sustained numbers of hours rather than being at one hour such that the overall profile of demand in Birmingham no longer appears to be heavily peaked. Friday and Saturday late evenings also appear only to be slightly different in total usage terms.

Average weekly demand

The individual estimates by rank and day were used to obtain a typical weekly estimate of demand by rank. The table below lists ranks in order of estimated weekly usage, and provides comparison to the information from the previous survey. Estimated locations are shown in *italic.*

Rank	2017		2014	
	Passengers	%	Passengers	%
New Street Station, private rank	10,110	23	N/A	
Navigation St	9,503	22	13,611	30
Broad St (super rank)	3,660	8	4,102	9
Colmore Row East, Cathedral	1,866	4	2,093	5
Oozells St	1,479	3	1,614	3
Dale End	1,412	3	2,686	6
Other night locations	*1,356*	*3*	*2,457*	*5*
Tesco, informal, New St	1,327	3		
Colmore Row West, Snow Hill Stn	1,287	3	1,716	4
Moor St	1,221	3	1,558	3
Coach Station	1,014	2	1,607	3
Hurst St (super rank)	898	2	1,449	3
OOT – Moseley	891	2	502	1
Snobs	858	2	1,971	4
Other Broad St, night	*732*	*2*	*820*	*2*
Edgbaston St Markets	*706*	*2*	*1,343*	*3*
OOT – Erdington	684	2	534	1
OOT – Northfield	*684*	*2*	*534*	*1*
Other ranks Colmore Row / New St	*657*	*2*	*792*	*2*
St Paul's Square	498	1	486	1
Aston Street, University	443	1	*248*	*1*
Other Broad St daytime	*370*	*1*	*403*	*1*
OOT – Harborne	363	1	431	1
OOT – Kings Heath	*363*	*1*	*332*	*1*
Debenhams	*282*	*1*	*537*	*1*
OOT – Sutton Coldfield	216	1	552	1
Direct hirings from radio ranks	*148*	*0.0*	*161*	*0.5*

Woodcock Street, Aston University	*111*			
OOT – Warstone Lane	79	0.0	*431*	*1*
Tesco Ladywood	ignored		46	0.0
Mailbox (informal)	Gone		898	2
Summer Row	Gone		855	2
Mailbox	0	0	838	2
TOTAL	**43,218**		**45,778**	
Compared to 2014	**-6%**			

The table above shows that usage of hackney carriages at ranks in the City of Birmingham is currently dominated by the two ranks serving New Street Station. The two ranks see almost equal levels of usage but take 45% of observed demand between them.

The next largest rank takes just 8% of total demand. This is the Broad Street night only super-rank. The Colmore Row East, Cathedral rank is fourth with around 4% of passengers. There are then six locations each with about 3% of passenger flows and the next nine all have around 2% of flows. There are then a final seven ranks with around 1%, and two others with lesser amounts. Overall, this suggests a wide range of active locations although none of these are busy in comparison to the top two ranks. However, many of these ranks actually see more demand than some locations in other towns and cities.

Comparing flows to 2014, overall demand appears to have reduced by around 6%. This generally appears to be an overall decline at most locations although there are exceptions. Total flow at the two station ranks is about 44% up – possibly with the completion of the works at the station and overall growth there arising from the new shops within the station complex. National rail statistics suggest growth there from 32,090,346 entries and exits in the year ending March 2013 compared to 39,077,018 for year ending March 2016 (the latest information available), a growth of 22% in a similar period to the two surveys being compared. This suggests the settling down of the construction impact (and the new shops introduced) has stimulated demand for hackney carriages here as well as from actual passenger growth.

Dale End has seen a more significant decline in usage as has the coach station rank, the Snobs rank and the super rank at Hurst Street. However, other than these ranks generally remain in the same order of importance. The out of town rank locations remain important to the hackney carriage economy of the City.

Detailed rank discussion

The following section discusses each rank in turn, again taking these in order of the busiest first, and the quietest last. Statistics such as total observed flow per day, vehicle occupancy, empty departure levels, passenger waits and vehicle waiting for passengers are presented. If a rank, or group of ranks have been estimated further detail is provided of which ranks this refers to and how they have been estimated. Details of full rank observations are in Appendix 3.

Where appropriate, we have included a qualitative appreciation of the performance of the rank over the observations made:

- Poor – major issues with service with regular passenger queues
- Fair – rank deals well with high volumes albeit with some passenger queues
- Good – service only rarely sees queues
- Excellent – very high turnover, very rare queues, other good operational practices noted such as drivers helping passengers, clearly a well established rank
- Developing – a rank which appears to be growing in usage but at a developmental stage rather than established

New St Station, private rank

This rank has been reinstated since the last survey. It was closed when the refurbishment of New Street station closed the front entrance and has been completely rebuilt albeit on the same line as before. It is formed of a two-lane road with a turning loop. Exit is using a barrier by which payment for the use of the location is taken. This requires the driver to have the appropriate card and also to have pre-payment on this activation card. Network Rail also apply supplementary conditions to those using this rank in terms of standards of driver and vehicle. Once within the loop, it is not easy to exit without passing through the full length of the rank.

The rank is fed, as before, from a range of council provided feeder ranks mainly along Smallbrook Queensway but also including Theatre Approach, Hinckley Street and Dudley Street. These in total provide a significant level of feeder spaces generally away from locations that could cause traffic congestion. The rank was observed on Friday 31st March starting at 08:00 and ending at 03:59 in the early hours of Saturday morning, 1st April 2017.]

The day saw a total of 1,414 passengers leaving this rank. They left in some 1,072 hackney carriage departures, a low average occupancy of 1.3 per vehicle. Just 3% of vehicles left the area empty without taking passengers. A quarter of these left in the midnight hour. Despite the high volumes, no passenger ever arrived without a vehicle being there for immediate hire.

Most hourly flows were between 58 and 128, with the peak at 18:00 with 128. There were two other hours with over 100 passengers, 20:00 with 112 and 09:00 with 102. The 01:00 hour saw just 12 and the 02:00 hour just one passenger, and there were no passengers (but two vehicles) in the 03:00 hour. The last train was due to arrive at 01:40 (from London).

General vehicle waits for passengers were between eight and 23 minutes, although mornings saw longer waits with lower flows.

Overall service here is **excellent**.

Navigation St

In essence, this rank and its initial feeder are exactly as they were in 2014. However, some of the detail and other feeders have changed. The triangle of roads formed of Navigation Street, Stephenson Street and Pinfold Street have had their flow reversed to protect tram movements along Stephenson Street (the current stub end terminus of the route). In the past, vehicles were able to wait in Stephenson Street to feed the rank, but this ceased with work on the tram route. There is a rank in Pinfold Street which could be used as a feeder but is rarely used. Other private hire vehicles tend to use this loop as a drop off point for the station, as do some hackney carriages.

The main feeder location for this rank is now across Hill Street in Navigation Street and then up Brunel Street towards the Suffolk Street Queensway. Former waiting along Hill Street towards Station Street is no longer encouraged and was impossible for a long period due to road works. The former parking area off Hill Street provided when this was the main station provision is now an active building.

Access to vehicles is from the passenger side, although driver side loading would be possible. The head of the rank is furthest away from the station exit meaning passengers have to walk past a long line of vehicles to get to the head of the queue. In reality, vehicles u-turn from the feeder on the other side of the road to join the main queue, although with other vehicle movements here this can be an issue.

Observations here covered Friday 31st March 2017 beginning at 08:00 and running until 03:59 in the early hours of Saturday morning. During these hours, 731 passengers left in 706 vehicles, a very low occupancy of just one per vehicle. Some 20% of vehicles arriving left without passengers. One person, in the midnight hour, arrived and had to wait a minute for a vehicle to arrive.

Most passenger flows in an hour were between 20 and 44, although the 20:00 hour saw 62, with flows of 56 and 54 in the hours either side of this. The 02:00 hour saw 14 passengers whilst the 03:00 saw just eight. Vehicles tended to wait between two and 15 minutes for passengers, though in the later hours this increased as flows reduced.

Overall service here is **very good** but suffers from issues arising from the layout that prevent service being at a higher level.

Broad St (super rank)
This rank is located near to the Centenary Square exit from Symphony Hall, and very close to many of the night venues in Broad Street. It is made up of several separate sections of legal markings and has marshals. Its principal use is night time and is fed from several other locations along and off Broad Street. Some of these have their own day and / or night existence in addition. Loading is from the passenger side of the vehicle. Even with changed traffic exit arrangements on Broad Street, driver side entry would still be very risky given the high levels of other traffic, including significant volumes of buses (although some are removed on busy nights).

This rank was observed on Friday 31st March 2017 from 20:00 until 05:59 the next morning, and Saturday 1st April 2017, from 23:00 until 06:59 the next morning.

Friday observations
During the course of the Friday, 1,091 passengers left this rank in 554 vehicles, a relatively high occupancy of two people per vehicle. Just 2% of all vehicles arriving left this location without passengers. During the course of our observations, two people arrived and had to wait a minute for a vehicle to arrive, although this was in the earliest hour of observation.

Passenger flows began in the 20:00 hour with just 28, but then rose quickly to reach the peak of 215 in the 23:00 hour, with the area becoming quiet in the 05:00 hour. There were six hours when flows were never less than 114, but just six in the 04:00 hour.

Vehicle waits for fares were between four and 16 minutes, with the longer waits in the periods towards the end of observations. At the start and end there were some vehicles observed waiting up to half an hour for fares.

Saturday observations
The Saturday saw marginally more passengers, 1,127 leaving in 558 vehicles, again a relatively high occupancy of two per vehicle. Again, the first hour saw two people arrive and have to wait a minute for a vehicle to arrive to take them. A slightly higher 3% of vehicles left without passengers.

Passenger flows in the four key hours were higher, always over 240 in any hour, although the numbers were fairly consistently high with the peak being 254 in the midnight hour. The 03:00 hour saw 133, 04:00 just ten and 05:00 just one, with the 06:00 hour completely quiet.

Vehicle waits were much less, just two to seven minutes, with no vehicle wait recorded of more than 12 minutes.

Summary
Service to this rank is **excellent** with some very high flows serviced without any real passenger waits arising from any vehicle shortages. This site is clearly a 'super rank' in terms of volumes using it, albeit over short periods.

Colmore Row East, Cathedral
This rank is on Colmore Row but on the opposite side of the road from the bus stops and Cathedral (and most shops). Passengers therefore load from the driver side of the vehicle and entry from the passenger side could be dangerous given the very high volumes of adjacent and passing buses. Redevelopment work which was under way near this rank in 2014 is now completed and the location can function without hindrance. Observations occurred on the Friday 31st March 2017 from 08:00 until 19:59 in the early evening.

During the observations, 205 people used the rank in 146 hackney carriages, a low occupancy of 1.4 passengers per vehicle. A further 15% of vehicle left the area without passengers. No passenger ever arrived to find no vehicle waiting to take them immediately.

Flows were generally between six and 15 between the 08:00 and the 15:00 hours, rising to between 21 and 40 for the next four hours, with the peak being in the 17:00 hour. Vehicle waits were between seven and 25 minutes for fares, with most tending to be on the longer side. The longest recorded vehicle wait was some 43 minutes.

Overall service here is **good** and similarly to Navigation Street restraints on better service relate to the rank layout**.**

Oozells St

Oozell's Street is now a short stub of road just off Broad Street which provides loading for goods vehicles servicing some of the Brindley Place development. The right hand side of this road provides space for up to five hackney carriages and is marked as a 24-hour rank. It sees its main use in the daytime for people in Brindley Place and along Broad Street. This rank was observed on Friday 31st March 2017 from 09:00 until 23:59.

Our observations saw 175 people leave the rank in 104 vehicles, a moderate occupancy of 1.7 per vehicle. 21% of arriving vehicles left without passengers. Just one passenger arrived in the 20:00 hour and had to wait a minute for a vehicle to arrive.

Flows were not particularly high, ranging from three to 21, but with a peak of 31 in the 18:00 hour. Flows were generally higher in the afternoon than the morning or in the evenings. Vehicle waits varied, with many waiting over half an hour to get a fare on average, with a longest observed wait for a vehicle of some 45 minutes.

Service here is **good**.

Dale End

This set of ranks are located on the edge of the main shopping area, near The Square shopping centre . There are two main parts to the rank, each of which takes five vehicles. Loading is from the passenger side, although driver side loading would be relatively safe albeit affected by some passing traffic including buses. The head of the rank faces the out of town direction although new traffic arrangements would now allow vehicles to leave from the Bull Street end, although most vehicles tend to leave along Dale End through to the main James Watt Queensway. There are further feeder ranks located along Dale End but these are rarely used. The area is principally daytime shopping.

Observations at this location covered Saturday operation on 31st March 2017 starting at 10:00 and ending at 21:59 that night. During the observations, 214 passengers left in 130 vehicles, a moderate occupancy of 1.6 per vehicle. There were no occasions when passengers arrived to find no vehicle ready for immediate hire.

Flows were variable, with eight in the 10:00 hour, 33 in the 11:00 and 15:00 hours, 35 in the 13:00, 13 in the 12:00 and a peak of 69 in the 14:00 hour. There were no passengers in the 16:00 to 19:00 hours at all, though vehicles continued to service the location, all leaving empty. Vehicle wait times here were often up to 26 minutes, and much longer in the evening period when there were some passengers.

Overall service here is **good**.

Other night locations (est)

There are several other ranks provided to serve specific clubs or other key generators of hackney carriage traffic. Those included in this set tend to be part time, though many are designated as 24-hour, and are those not included in other specific lists within this write-up. Most only see use related to the specific generator near by, and most have not changed since the previous survey, although their usage can change immediately if the nearby generator closes or changes its operation, which can occur randomly.

Examples are Lower Essex Street / Kent Street, King Edwards Road NIA, Lionel Street, Livery Street and Heath Mill Lane. An estimate was made assuming they provide about the same as our observations at Snobs and at St Paul's Square.

Tesco, informal, New Street

Before the works for the tram system closed and revised the central area road network, there was a key rank in Stephenson Place, at the heart of the New Street / Corporation Street shopping axis. Since closure of that rank, more shops have opened in New Street and streets off New Street, in particular the Tesco Metro in Temple Street. Some access for vehicles is provided by a loop of Temple Street, New Street and Bennett's Hill, mainly for delivery vehicles. However, hackney carriages have established an informal rank in agreement with most interested parties on the corner of Temple Street and New Street. This location is highly visible from along New Street and is directly outside the Tesco Express store. Feeder spaces are formed back up Temple Street, with waiting vehicles using the Tesco loading bay and other parking bays and moving when required. This does not seem to cause any significant issues for these other users.

This location was observed on Saturday 1st April 2017 from 10:00 until 17:59 during key shopping hours. In that period 201 people left in 93 vehicles, a relatively high occupancy of 2.2 per vehicle, amongst the highest seen, and very good for a daytime rank. Just 6% of vehicles left empty.

No passenger ever arrived to find no vehicle available. Morning flows were lower, one in the first hour observed and 11 in the 11:00 hour. Flows were then between 24 and 33 apart from the peak of 50 in the 14:00 hour. Typical vehicle waits for passenger were low, between five and nine minutes.

Service here is **very good**.

Colmore Row West, Snow Hill Station

This rank is located in a small lay-by near to the pedestrian entrance to Snow Hill station. In 2014, this was also the exit from the Midland Metro tram route terminus, but in 2017 the tram had been extended through to New Street station and this terminus had become disused. The tram related road works affecting access have now ended. Loading is from the passenger side of the vehicle, again with relatively safe driver side entry possible albeit with relatively heavy traffic, albeit slow moving given the nearby traffic control measures related to the tram route.

This rank was observed on Saturday 1st April 2017 from 12:00 until 19:59 that evening. During the course of these observations, 132 passengers used 65 hackney carriages to leave this rank, a relatively high occupancy of two passengers per vehicle. 24% of arriving vehicles left empty.

No passenger ever arrived without a vehicle being available for immediate hire. Flows ranged from three to seven, although there was a peak of 14 in the 14:00 hour, and flows were 25 and 30 in the 18:00 and 19:00 hours respectively. Vehicle waits were at times up to 40 minutes, though 15 to 30 minutes were more typical.

Service to this rank is **good**.

Moor St

This rank is on the Moor Street station side of Moor Street dual carriageway. It has space for seven vehicles and is in a separate layby although to the rear of the rank is a loading bay. Steps lead down to this rank from the platforms at Moor Street. It is on the other side of the road from an exit from the main Bull Ring shopping centre. Passengers enter from the passenger side and driver side loading would not be safe given the high volumes of buses and other traffic at this location.

This rank was observed from 09:00 on Saturday 1st April 2017 until 23:59 that evening. During these hours, 185 people left the rank in 111 vehicles, a moderate occupancy of 1.7 per vehicle. Just 4% of the vehicles arriving left without passengers. There were two passengers in the 12:00 hour who arrived and had to wait for a vehicle to arrive, but for just under two minutes only.

Passenger flows here were just one in each of the 09:00 and 10:00 hours, but were then between eight and 22 in most of the remaining hours, apart from there being just five in the 13:00 hour. The peak hour was 22 people in the 15:00 hour. Vehicle waits varied but were longer in quieter hours.

Overall service here is **good**.

Coach Station

This set of ranks service the Coach Station in Digbeth. Mill Lane provides an excellent pick up location directly outside the main exit from the coach station. Whilst other traffic can use this one-way street, in practice it is almost exclusively used by hackney carriages. Private car parking servicing the coach station is located at the other end of the station, and most of the road which is not marked as hackney carriage ranks is double yellow lines. The head of the rank is on the opposite side of the road, but loading from any door is relatively easy and safe due to the nature of the road here.

This set of ranks was observed on Friday 31st March 2017 from 09:00 until 23:59 that night. A total of 130 passengers used this rank, leaving in some 80 hackney carriages, a moderate occupancy of 1.6 per vehicle. No passenger arrived without a vehicle being at the rank. However, a further 26% of vehicles arrived and left without passengers.

Passenger flows were two to nine in the hours from 09:00 to 13:00. After this flows were between 10 and 20 in each hour up to and including the 20:00. The peak was 20 people in the 14:00 hour. The final hour active was the 21:00 with eight passengers, after which there were no vehicles or passengers.

Typical vehicle waits here could be long, with over 40 minutes average typical even when there were higher flows. Several vehicles waited here for over an hour, particularly in the morning period.

Service here is **good**.

Hurst St (super rank)

This is the other of the two super-ranks with marshal provision. This location services the China Town area and several clubs and theatres. Since the last survey, redevelopment has begun in this location and access to and from the rank is more restricted. The former little used rank actually in Hurst Street is now much more the header, with vehicles feeding from Ladywell Walk. The previous exit direct to Smallbrook Queensway is now closed. There is also the new Snobs club rank on Smallbrook Queensway itself which gives better egress for some passengers compared to this rank.

For both sections of this rank, loading is from the passenger side, although driver side loading would be safer than in the past given the reduced level and potential speed of other traffic with the rearranged flows. It was observed on Friday 31st March 2017 from 22:00 until 05:59 in the early hours of Saturday, and again from 23:00 on Saturday 1st April 2017 until 06:59 on Sunday morning.

Friday observations
During the Friday we observed 268 people leaving the location in 191 vehicles, a low occupancy of 1.4 per vehicle. 10% of all vehicles arriving left without passengers. There were no passengers ever arriving without a vehicle being there to take them immediately.

The peak flow here was in the first hour, with 72 passengers for the 22:00 hour. Flows then reduced to 59 and then between 17 and 32 in each hour until the 05:00 hour which saw just seven passengers, and the 06:00 hour seeing just a single passenger.

Vehicle waits on average for fares varied from two minutes up to 24 minutes, with some vehicles observed waiting nearly 33 minutes, albeit later in the operating period.

Saturday observations
Similarly to the Broad Street night super rank, flows on the Saturday were very similar to those on the Friday. 276 people left in 178 vehicles, although this was a moderate occupancy of 1.6 per vehicle. Again, there were no passengers arriving when vehicles were absent. 21% of arriving vehicles left without passengers.

Flows on this night peaked at 60 in the midnight hour, and then reduced although the rank still saw a single passenger in the 06:00 hour. Vehicle waits for passengers were generally five to nine minutes, fairly short, although the

05:00 hour saw longer waits, and the longest maximum observed wait of nearly 24 minutes by a vehicle.

Summary
Service to this rank is **very good.**

Out of town - Moseley
This rank is located on St Mary's Row in the one way section leading from Alcester Road towards Wake Green Road. This area is a key pedestrian focus at this junction. The all-hour section of rank is in a lay-by, but this does imply driver side loading, but there is a feeder section operating part time on the opposite side of this section of road. Observations here ran from 10:00 on Saturday 1st April until 21:59 that evening.

During the observed period, 135 people left the rank using 67 hackney carriages, a relatively high occupancy of two per vehicle. A further 12% of vehicles left without passengers. There were ten people who arrived without a vehicle being there for immediate hire. The longest wait was two minutes. Averaged over all passengers using the rank, the typical expected wait was just seven seconds.

There were hours during the morning and early afternoon when there were no vehicles or passengers, particularly the 12:00 hour, whilst 14:00 saw vehicles but not passengers. Typical flows were just one to four, with numbers then rising to five in the 20:00 hour, 24 in the 21:00, 37 in the 22:00 and the peak of 50 in the 23:00 hour. Vehicle waits were long when the flows were lower, but these reduced from 21:00 onwards with increased patronage – between three and eight minutes.

Overall service here is **fair**.

Snobs
This club has moved since the last survey, and is now located on the corner of Hurst Street and Smallbrook Queensway. A rank now exists directly outside on Smallbrook Queensway. It provides passenger side loading directly from outside the club exit. This rank was observed on the Saturday night, 1st April 2017, starting at 23:00 and ending at 04:59 in the early hours of Sunday morning, 2nd April 2017.

During these observations, 286 passengers used 185 hackney carriages to leave this rank, a moderate occupancy of 1.5 per vehicle. A further 7% of vehicles left without passengers. There were five passengers who had to wait for a vehicle to arrive in the 04:00 hour. However, shared over all passengers, the typical wait was just two seconds.

Passenger flows were four in the 23:00 hour, rising to a peak of 72 in the 02:00 hour, then dropping to 68 and 51 before the end of our observations. Vehicle waits in the busier hours were relatively high, 16 to 18 minutes, with longest waits observed of nearly 27 minutes

Overall service here is **fair**.

Other Broad St night ranks

There are several other ranks provided along Broad Street and in some of the side roads off Broad Street. Our overall estimate of average weekly demand adds a further 20% of the volume from the Broad Street super rank to allow for usage of the myriad of other ranks which sometimes feed the main rank, and sometimes have their own usage.

Edgbaston St Markets

Edgbaston Street is now mainly pedestrianised. However, the first section off Dudley Street has been retained as a loop rank and delivery access. It provides a reasonable number of spaces for vehicles, and is used in the daytime although with relatively awkward access and egress tends to see less usage than other locations. We have allowed an estimate of 50% of the volume of passengers observed at Dale End for this location.

Out of town – Erdington

This rank is located directly outside the Parish Church on Erdington High Street, and services the busy local shopping centre here. Loading is from the passenger side of vehicles. The rank here was observed from 10:00 until 18:59 on Friday 31st March 2017.

Some 114 passengers used this rank during our observations, leaving in 80 hackney carriage movements. This is a low occupancy of 1.4 per vehicle. No passenger ever arrived without there being a vehicle available for immediate hire. Flows ranged from one to 24 with the peak in the 15:00 hour. The area became quiet in the 18:00 hour. Typical vehicle waits for fares were six to 21 minutes.

Overall service here is **excellent**.

Out of town – Northfield (estimated)

This rank is located in Rochester Road, just off the main shopping street of Northfield. Passenger side loading occurs, with driver side loading possible with care. Usage of this rank was estimated to be similar to the Erdington location, given the similar nature of the two centres.

Other ranks, Colmore Row / New St area (estimated)

Within the large number of streets around the Cathedral area, there are a number of ranks which see irregular usage, both sides of Colmore Row and near to specific night locations. We estimated that these might see in the order of 20% of the usage from the lesser used of the two Colmore Row ranks.

St Paul's Square

This rank is located outside the Jam House in the St Paul's Square area of the City. It mainly services the night life here. There is also a high level of private hire pick-ups in Ludgate Hill nearby. Observations of the hackney carriage activity here occurred on Friday 31st March 2017 between 22:00 and 03:59.
166 passengers used 100 hackney carriages to leave this rank, a moderate occupancy of 1.7 per vehicle. A further 13% of vehicles left without passengers. None ever arrived without a vehicle being there to take them away directly.

Flows rose from 16 up to a peak of 69 in the 01:00 hour before dropping to 23 and the area then becoming quiet. Vehicles waited between three and 14 minutes for a fare, but longer in the last hour.

Overall service here is **good**.

Aston Street, University

This rank is located in what is now a dead end road in the centre of the University. Vehicles loop round the roundabout with principally passenger side loading, although the area is generally only for vehicles turning round having set down or picked up in the general parking spaces further back towards the main road. The rank here was observed from 09:00 until 16:59 on Friday 31st March 2017.

During that period, 62 passengers left the rank in 44 vehicles, a low occupancy of 1.4 per vehicle. A further 30% of vehicles left without passengers. No passenger arrived and found they had to wait for a vehicle to arrive.

Passenger flows were between two and 15, with the peak in the 12:00 hour. Vehicle waits were variable and could be long, although the longest average wait was in the hour before the busiest hour, so this could have been drivers working towards the expected peak.

Overall service here is **good**.

Other Broad St daytime (estimated)

Whilst we observed some of the daytime Broad Street ranks, in a similar manner to the night provision, there are many other ranks which often see some usage. The estimated patronage of these was based on 25% of the observed passengers at the Oozells Street location.

Out of town- Harborne

This rank is located just off the main road through Harborne, and very near to a major supermarket, albeit over the road from the rank. Loading is from the passenger side of vehicles. Observations at this rank occurred on Friday 31st March 2017 from 10:00 until 18:59.

The rank saw 43 passengers leaving in 32 hackney carriages, a low occupancy of 1.3 per vehicle. Some 58% of vehicles left empty, suggesting this rank may also be a radio rank where vehicles wait for bookings. This is highly likely as the main radio rank network has its main base not far away.

Passenger flows were generally very low, between one and five in most hours. The 16:00 hour saw seven, the 17:00 a peak of 12 passengers whilst the 18:00 hour then reduced to just four people. There were three passengers who arrived when no vehicles were available, though their wait was never more than one minute. Over all passengers, this was an average typical delay of six seconds.

Vehicle waits were two to 25 minutes, not that long given the low flows, again suggesting the use as a radio rank which people take advantage of when passing by. The longest observed vehicle wait was 34 minutes.

Overall service is **good** although demand is relatively low.

Out of town – King's Heath (estimated)

This rank is located in Institute Road, just off the main High Street, with flows estimated to be very similar to those observed at the Harborne rank.

Debenhams (estimated)

This small rank is on the opposite side of Smallbrook Queensway from the feeder rank for the private New Street station location. It sees limited levels of usage, and we estimated this to be 20% of the flows at Dale End rank.

Out of town – Sutton Coldfield

The rank here is located on the northern part of the roundabout at the southern end of the pedestrianised shopping area. Whilst little used in the daytime, it is at the heart of several late night venues and tends to be well used at night. Loading can be awkward being on a roundabout, but is from the passenger side. This rank was observed from 14:00 on Saturday 1st April 2017 until 03:59 in the early hours of Sunday 2nd April 2017.

72 people used this rank, leaving in 39 vehicles, a high average occupancy of 1.8 per vehicle. Three people arrived and had to wait up to just over a minute for a vehicle to arrive. 24% of arriving vehicles actually left without taking fares.

Whilst there were some vehicles in the 14:00, 17:00, 19:00 and 20:00 hours, there was just one passenger in the 18:00 hour. This changed in the 22:00 hour when there were 10 passengers, followed by 24, 15, 12 and 10 in the succeeding hours, with the area becoming quiet in the 03:00 hour. The peak was around formal pub closing times at 23:00. Typical vehicle waits for fares ranged from four to 15 minutes.

Overall service here is **good**.

Direct hiring from radio ranks (estimated)

There are two ranks in the Broad Street / Five Ways area which are principally used as locations where hackney carriages wait to respond to radio network calls. One is on the Harborne Road approach to the Five Ways island, with the other located at the Broad Street end of Bridge Street. We have allowed for some direct hirings by passengers from these locations, assuming they would be around 10% of the level observed from Oozells Street.

Out of Town – Warstone Lane, Jewellery Quarter

This rank is located near the main junction in the Jewellery Quarter in a very busy traffic environment. Observations at this rank ran from 08:00 on Friday 31st March 2017 until 02:59 in the early hours of Saturday morning.

In the period observed, just 13 people left the rank using eight vehicles, a moderate occupancy of 1.6 per vehicle. A very high 81% of vehicles left the rank empty, suggesting some use of the rank as a possible radio waiting location.

The rank only ever saw between one and three passengers, but vehicles were nearly always there up till the 22:00 hour, and again in the midnight hour. Passengers used the rank in the 09:00, 10:00, 11:00, 15:00, 17:00, 20:00, 21:00 and 22:00 hours. Vehicle waits for fares, however, were usually towards half an hour.

Service here is **good.**

Tesco Ladywood

There is a very small rank directly outside one exit from this store. It has a bus stop directly behind. Since the last survey, this supermarket has closed, and so there is no longer any demand at this point and no observations were therefore required.

Mailbox (informal)

During the last survey, road works were under way near the main Mailbox rank, and there was refurbishment of the Mailbox that meant the main exit could not be used. This meant there was an informal location for hackney carriages which is no longer needed given the end of the refurbishment.

Summer Row

This location is no longer a rank given road revisions related to the Paradise Circus redevelopment, although many night venues still exist here, and some pick-ups are therefore likely.

Mailbox

This rank is located directly outside the main exit from the Mailbox shopping centre and offices. Observations here were undertaken on Friday 31st March 2017, running from 10:00 through to 21:59 that evening. During that period, though five vehicles arrived, no passengers used this location at all.

Berkley Street

This rank is one of the smaller ranks located just off Broad Street. This rank was observed from 20:00 on Saturday 1st April 2017 until 01:59 in the early hours of Sunday morning, 2nd April 2017. There was just one vehicle that used the rank, and no passengers during this period.

Airport

We are aware that there a reasonable number of hackney carriages who principally service the shared rank at Birmingham Airport (joint with Solihull hackney carriages). Given that this is a private rank, we have not made any estimates of the level of passengers at this location.

Summary

Birmingham has a large number of active ranks, all of which see generally good to excellent service from the fleet of vehicles, irrespective of if the rank is central or in the suburbs, daytime or at night, high or low flow.

Fleet utilisation

A sample of vehicle plate numbers were recorded for nine sample hours in seven different sets covering five different key locations in the city centre. This test was undertaken on the Saturday which was expected to be when most vehicles might be active. 449 different observations were obtained.

The observations found 260 different hackney carriages active, just 21% of the total fleet. The highest number of recordings of one vehicle was six times. Considering the locations covered, 73% of all vehicles seen were only seen at one of the locations, 23% at two and 4% at three. There was just one vehicle seen in four of the sites. This suggests many vehicles focus on working one location.

In terms of total vehicle observations, the busiest time was 18:30 to 20:00 near New Street station entrance. 26% of all our sampled plate observations were here. 15:30 to 16:30 at the same location identified 20%. The approach to Colmore Row saw 16% in the hour 14:00 to 15:00.

In terms of individual plates numbers, the same order applied, with New Street 18:30 to 20:00 seeing the highest level, 7% of all plates, 6% in the previous session there, and 4% at the approach to Colmore Row, as well as for both of the observations in Broad Street. Dale End and Hurst Street observations had just 2% of the fleet serving them in the periods covered.

Using the above information, and considering other ranks which would need proportions of the fleet, we would expect around half the fleet was likely to have been active during the Saturday of the survey. We estimate the top three ranks of New Street station, Navigation Street and Broad Street would take a quarter of the total on the Saturday, and the other ranks the other quarter, including around 5% of this for the Airport (although we are aware some of these also work nights in town). There are also a good proportion of vehicles that effectively work most of their time as private hire on a major hackney carriage radio circuit.

This suggests there remains a significant level of spare capacity in the hackney carriage fleet at this time. Even with allowances for those who choose just to work specific days, or who might be not working, the City could currently still meet observed demand with up to 25% less vehicles than are currently in place.

Rank abuse

For each location observed, all vehicles operating at or near the rank were recorded (see earlier). This section considers the levels of abuse by other vehicles by rank.

The overall level of abuse on average is not high, with just 10% of movements being private cars, 10% private hire, 1% goods vehicles and only a very small number of emergency vehicles at or near ranks. This leaves 79% of our recorded movements as hackney carriages at ranks.

However, this description masks a wide range of variation. The best rank in terms of operation purity was that at Erdington, with just 1% of all movements anything other than hackney carriages. This is more remarkable given the tight location of the rank in an area under high parking pressures.

The next two ranks seeing very low abuse (in both cases 1% of vehicles were private hire and 1% were private cars) are the Broad Street super-rank and the New Street station private rank. In the latter case, all the abuse related to vehicles seen in the non-private feeder rank outside the restricted rank area within the station confines.

At the opposite end of the spectrum, there were three ranks where the level of abuse by private cars was 45% or more of all movements. The worst location was Berkley Street in the Broad Street area, where 62% of movements were cars,3% were goods vehicles, 32% were private hire vehicles and just 4% were hackney carriages. However, this recording was undertaken at a period when this rank was not really used by hackney carriages, and the local pressure on parking potentially meant people were just taking advantage of available space, although this would then deny the availability to hackney carriages. 32% of those movements observed here were private hire, suggesting it is a place people are advised to wait for booked fares.

Sutton Coldfield rank is a very unusual location. Whilst it is a very good spot for people to obtain hackney carriages at night, it is on a busy roundabout and the factors which make the spot great for hackney carriages to pick up also makes it attractive to the high volume of cars which pick up here. It is also a common spot for private hire vehicles to obtain their passengers.

The principal issue is that the roundabout provides a place for vehicles arriving to turn round to return where they have come from. The rank layout is also such that people are channelled towards the head of the rank with pedestrian railing preventing access at other points. Other nearby potential pick up locations tend to be parked on, or where stopping causes more issue to passing traffic.

At this site, there were 10% of all movements which were hackney carriage, 40% were private hire and 47% were private cars. This clearly caused some issue with ability of the hackney carriages to service the location and there would be value in trying to further enforce the place of the rank, although this may be difficult as most activity is later at night and significant attempts have already been made to show it is a hackney carriage rank and to restrict pedestrian access to the area.

For some reason during this survey, the mailbox rank was not used as much as it was in the previous survey, even with the road and refurbishment works now completed. However, the location was a key point for both private car pick-ups as well as those by private hire vehicles, so there remains demand here.

The Snow Hill station rank also saw 31% of movements private cars and 34% private hire vehicles, which is very difficult for a relatively small rank. The principal issue here is lack of other realistic locations for these other vehicles to drop off and pick up their passengers legitimately, given there is very high pedestrian flow at this location, from the station and the new office blocks, as well as from some of the nearby shops. This area has remained busy despite loss of the tram passengers to the extended route into the city centre.

The coach station rank suffers similarly to the Snow Hill rank. For access reasons, the road with the rank cannot be purely hackney carriage only, but this does mean that private cars and private hire vehicles setting down for the coach station can be tempted to pull up either on the double yellow lines, or on the rank, if there is space, or even if not, as for many there is no clear alternative. This could be reduced by better signing at the start of this section of road pointing those dropping off or expecting to pick up coach passengers to the formal provision at the opposite end of the coach station, which is often relatively free for use. This should particularly be true for private hire vehicles who do not really have any excuse for not using the provided facilities, or even dropping at the far end entrance (albeit on double yellow lines) in any event.

The Aston Street rank can see mainly private car abuse because it is the furthest point that private vehicles can get towards the University main building and other buildings before having to return. There is plenty of parking nearby and such abuse could and should be reduced.

The Tesco informal rank sees other vehicles setting down and picking up nearby – but their usage is almost as legitimate as that for the hackney carriages given that this rank is not formally in place. Again, this arises from the pressure on parking and pick-ups arising from the very good location it provides near to all the shopping. It can also provide and entry to New Street Station. However, when formalisation of this rank occurs, there will be need to remember the parking pressure that exists here.

Other locations see 14% or less abuse by private cars and relatively low levels of private hire issues, apart from private hire near Snobs (19%) and near St Paul's Square ranks (15%). In the latter location, there is an informal location just round the corner typically used by private hire to pick up. Both of these locations would have legitimate private hire pick-ups from bookings so it is hard to see how much negative impact this actually has.

Further discussions in regard to proper provision for private hire pick-ups and set down occur in the synthesis and recommendation chapters.

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4 General public views

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

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

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

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

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

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

Finally, some recent surveys have placed an electronic copy of the questionnaire on their web site to allow interested persons to respond, although again there needs to be an element of care with such results as people choosing to take part may have a vested interest. For this survey, a total of 291 people were interviewed in the streets across the Birmingham council area. 50 were interviewed in each of Moseley and Sutton Coldfield, and the balance of 191 in the city centre area. Further details are in Appendix 4.

64% of those interviewed said they had used a licensed vehicle in the last three months, a much higher level than the 43% in the last survey. This was mainly dominated by higher levels of stated usage in the two outer areas, which is almost certain to be principally private hire. Most of those interviewed told us how often they used licensed vehicles. This produced an estimate of 3.8 trips per person per vehicle per month, again an increase from the estimated 1.6 in the previous survey. The city centre sample had the lowest level, 2.6 trips whilst Sutton Coldfield had a very high usage of 8.2, not necessarily surprising given this is one of the higher income areas.

Overall, 83% said they obtained licensed vehicles by phone methods of some kind, with 51% phoning a company, very similar to the last survey. Mobile or smart phone use had increased to 28% whilst rank usage levels stated are down from 23% to 16%, with hailing significantly reduced from 6% to just 1%, closer to the national average. This latter element has probably been worst hit by introduction of app based methods of obtaining vehicles (see below).

When asked the companies they contacted, there were some 56 different companies named, compared to 42 in the previous survey. There are currently 89 listed Birmingham City council private hire operators. Some are duplicates.

70% of those interviewed named at least one company they would phone. Of these, 11% named three companies (3% in the last survey), 24% named two (21%) and 65% named just one (down from 76%). This suggests there is now more choice and that people are a little less tied to one company, though the level of single company quotes is much higher than in many other similar surveys.

The main change has been a new entrant who now takes 17% of all the quotes regarding companies. The hackney carriage network which formerly had 16% of quotes has now reduced to 9%, but is still the top of the list apart from the new entrant. Whereas in the previous report, an out of town company obtained nearly as many quotes at the hackney carriage phone network, that company now has a Birmingham base but has lost share from 14% to 4%. Many other companies from the last survey have also lost market share in the quotes from those interviewed.

The top four Birmingham based private hire companies, apart from the new entrant already mentioned, have 9%, 7%, 5% and 5% of the share between them and all have increased share from the last survey, so the news is not all downwards. These are clearly companies that appear to have fought to increase their share. Four others have 4% each. The level of out of town vehicles and companies has also clearly increased, with a focus on those from north of Birmingham, allied presumably to another recent influx from another licensing authority. However, although there are more names (13 compared to 11 excluding four companies not readily traceable), their impact from quoted usage is no more than 6% of the total mentions cumulatively. Many former out of town operators have also chosen to have Birmingham bases now.

It is clear that the impact of the new Birmingham entrant, with a different style of obtaining bookings, has been significant on the phone bookings of the hackney carriage radio company, and on several of the previously larger private hire companies in the area. There has also been a depression in the level of hailing of cabs in the responses, which may also be an impact. Out of town companies have also chipped away and gained favour from those using licensed vehicles in the area.

People were asked how often they used hackney carriages. The resulting value, 1.4 trips per person per month, was higher than the 0.5 from last time, and highest in the city centre (2.5), but lowest in Sutton (0.4). Similarly to the previous survey, hackney carriages are very visible across the City and just 1% said they could not remember seeing a hackney carriage in the City. The proportion not remembering when they last used a hackney carriage had increased marginally from 39% to 42%, not significant but notable.

An interesting point is that the overall market for licensed vehicle services does appear to have grown from the results of the on-street surveys. The proportion of usage quoted as hackney carriage has also increased from 31% to 37%, so the increased market size has actually appeared to increase overall usage despite the change downwards in market share. This is a known phenomenon at the present time (as recently mentioned at the Private Hire and Taxi Monthly exhibition in May 2017).

38 different rank locations were named, although some were slightly different or colloquial names, such as “Marks and Spencer’s” or “Bull Ring”. Several of the suburban ranks were named, as well as some lesser used locations and some which were unclear (eg Five Ways station, Deritend, Hill Street). New Street station got the most mentions, with 35%, dominating the list by some way. The next highest share was 8% for Snow Hill Station (with a further 7% for Colmore Row, which may be the Cathedral rank or the station rank). A further 7% named Broad Street, 7% Moseley Village (all those were from the sample collected there), 4% Navigation Street and 4% for the Airport rank.

This suggests an overall good knowledge of ranks across the city, although there would also clearly still be benefit from providing a clear map of all ranks and ensuring somehow each location was provided with an advertised name.

Half of all those interviewed told us at least one rank location. 5% of these named four ranks, 17% three, 31% two and 47% just one, again confirming relatively good knowledge of ranks by people.

However, of all the ranks quoted, 73% of the mentions were not actually used by those who quoted them. Just 13% of those in Sutton Coldfield used the ranks they named, although a much higher 34% said they used the ones they named in the Moseley interviewees.

People were asked if they felt new ranks were needed. There were just 16 responses, very low, and suggesting general satisfaction with ranks currently provided. No-one in the Moseley sample suggested any new locations. All suggestions were for the city centre, apart from a suggestion of ranks needed at the NEC and the Airport (one mention each). The highest suggestion, by four people, was a rank at New Street station which already has several different locations provided. Three said High Street and two just said in the city centre. None are significant.

People were asked about issues they had with the current hackney carriage service. 15% of people responded to say they had issues, not a high volume. 25% of these had two problems, none quoted more. In total, there were 56 issues, with the largest proportion, 34% being delay getting a hackney carriage, though these figures were dominated by those from the two outer areas. Position of ranks was second with 21%, all for the city centre respondents, followed by cleanliness and driver issues both with 16%.

As is normal, a higher number of responses were obtained regarding matters which may encourage people to use hackney carriages more, some 182 suggestions. Suggestions were dominated by people suggesting 'other' factors. As is normal, the top one of these was 'cheaper fares' – being 62% of all the suggestions made. The next highest value of 9% related to better located ranks, then better drivers or vehicles (8% each), then more hackney carriages to phone for (5%) and finally more hackney carriages at ranks (4%). Other, very minor, suggestions were OAP fares, card machines and reliability, but none of these obtained more than one or two mentions.

Overall, it suggests there is little which can be done to increase hackney carriage usage, apart from trying to teach people about their true cost.

Most people responded to the question if they needed, or knew anyone who needed adapted hackney carriage or other licensed vehicles to travel. A very moderate 80% said they did not – this value is often 90% or more, suggesting a higher population of those needing adapted vehicles. This is an increase from the previous survey results which were more typical. The response this time was also much more complete.

Most of those needing an adapted vehicle said the WAV style was what they needed. Interestingly, those who said they needed some other form of adaptation mostly said they needed an access ramp to get into a vehicle, but did not give more information. One said a larger vehicle and another a lower chassis.

People were asked if they had ever given up waiting for a hackney carriage anywhere in Birmingham. 22 people, or 8% of those responding said they had. They mentioned 13 different locations, of which three were not recognisable as ranks. This implies a measurable latent demand factor of 6.5%, slightly higher than the previous survey, but not peculiarly high. 18% of responses were people giving up waiting in Broad Street, 18% at New Street station and 14% in Colmore Row (though which rank is not mentioned).

49% had regular access to a car and 80% lived in the area (with higher values for the two outer areas).

In terms of comparison to the latest available census proportions, the survey interviewed a higher proportion of men (52% compared to 49%), but got the split on age almost correct, with the under 30’s slightly over-represented (30% compared to 27%), 31-55 marginally under-represented (34% compared to 36%) and the over 55’s very slightly under-represented (36% compared to 37%). There were variations between the areas, with Sutton dominated by the older group and Moseley by the mid-group.

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5 Key stakeholder consultation

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

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

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

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

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

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.

Appendix 5 presents details of those consulted and levels of response.

Supermarkets

Three supermarkets in various suburbs of the City responded, all saying that their customers did use licensed vehicles. All had a Freephone facility, with one saying its staff would call vehicles if requested. Two were aware of the (active) ranks nearby them. Two had never received any complaints about the service, whilst one had customers suggest vehicles were occasionally late when phoned for.

Two central Birmingham supermarkets were contacted. These are smaller convenience type outlets more recently established given the increase in people living in central Birmingham accommodation over recent years. One location is near to a highway loop road which allows an informal hackney carriage rank to operate whilst the other is in the centre of the pedestrianised city core shopping area and some distance from any available road options. The location with nearby highway access and an active although informal rank said its customers do use hackney carriages regularly from the rank which they allow to occur within their loading access. The other location, whose nearest public transport is a tram stop and one of the new interchange points (but also the Dale End taxi rank), told us that their customers do not use licensed vehicles at all. This is not surprising given the location.

Hotels

Six hotels told us their customers did use licensed vehicles. Three said reception would call for a vehicle, one said staff would do this, and the other two said that either reception would call or people would make their own arrangements to get licensed vehicles. Three were aware of ranks nearby, whilst one gave a company name as the nearest available licensed vehicle option. Two others were not aware of any nearby ranks. None had ever received any complaints about the service from their customers.

Public houses

Five public houses responded, one saying their customers did not use licensed vehicles. The other four said customers did use them. One said bar staff would phone, another two said staff would call or customers often made their own arrangements, one said staff would phone. None had received any complaints about the service provided, and all were aware of ranks nearby, apart from one in the suburbs that named a private hire operator.

Night clubs

The night club that responded said their customers used licensed vehicles and used them from ranks in Broad Street. Their customers had no issues with the service provided.

Other entertainment venues

The Mac Arts complex told us their customers did use licensed vehicles. Their sales and information desk would obtain a vehicle if needed, from one private hire company. There were no complaints they were aware of having been made.

Restaurants

One restaurant said their customers did use licensed vehicles, but only rarely. When needed, people usually contacted companies themselves, but staff would also call if needed. They were aware of the Snow Hill Station active rank. No complaints had been received.

Hospitals

There was no comment from the hospital contacted.

Police

Birmingham is relatively unique in having a police officer assigned to the licensing section to deal with issues related to licensed vehicles in the area. They also provide regular feedback about ranks and the impact of policy and other changes. Their main concern was the impact of out of town vehicles and the difference in standards this implied in terms of driver behaviour and knowledge about the area. There were no issues with any shortage of hackney carriages or private hire.

Ranks needed urgent review. Many are not used and many are not worth servicing. They felt that this could be undertaken with active hackney carriage drivers and the Council, with unused rank spaces swopped for space at locations where more spaces were needed to allow for high demand levels at current active ranks.

Disability

Contact was made with the local representatives for Guide Dogs for the Blind. They were generally happy with the service provided, and felt that the City dealt with any issues arising promptly and effectively, particularly in regard to issues when poor service was received.

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6 Trade stakeholder views

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

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

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

In all cases, we believe it is essential we document the method used clearly and measure response levels. For this survey, a printed letter and questionnaire was produced for the Council to issue to all involved in the trade. This was undertaken including tweeting of the electronic link to the questionnaire to all those linked to the police licensing officer. An email was also sent to all registered trade representatives advising them of the issue and the link. It was distributed to drivers attending the office. Finally, responses were encouraged at a Trade Liaison Group meeting, and a meeting then held on Wednesday 12th July 2017 with all trade representatives who chose to respond to the invitation to the meeting. Apologies were received from some unable to make that meeting. Further notes of that meeting and responses following it are provided after the results of the all-driver survey. However, a planned inclusion on a postcard sent to all drivers for other reasons may not have happened as intended.

There were 64 responses to the all-driver survey. 78% were from hackney carriage drivers and 22% from private hire. This was a 4% response for the hackney carriage drivers and 0.3% for private hire, relatively low, with the overall value 1% across all drivers. However, the numbers were such that the results should be robust for the purposes of this evaluation.

Further comment was made (see later) by representatives about if they considered this to be sufficient or not.

For the full survey, the average number of years of service was 19, with the longest responding driver having been a Birmingham licensed vehicle driver for some 43 years. This is a high level of expertise, and higher than in most other locations recently surveyed.

Respondents told us how long they had worked in the week before they completed the survey. 38% had worked six days, 24% five days and 21% seven days. There were people contributing to the survey who had worked less, 9% said four days, 7% three and 2% two days. None had worked just a single day. They said their average number of days was five, with average hours 39, but a maximum found of some 80 hours. These are relatively typical hours worked.

Many suggested factors that influenced when they worked. The top score of 24% was given equally to working at busy times, and avoiding times when traffic was heavy. 18% said they worked when they preferred to, 15% simply said 'other reasons' whilst 12% admitted they avoided times when there were drunken, violent or abusive customers. 6% worked around family commitments and the final 3% said they worked when they had promised to work according to commitments to customers.

A high 90% said they owned their own vehicle. 97% said that no-one else drove their vehicle, suggesting a high level of vehicle ownership by drivers, and very little double-shifting of vehicles. This implies a high level of spare capacity in the fleet were it required. However, this is partially reduced by the moderate level of hours worked (with the maximum being nearly half the available hours in a week).

36% of the hackney carriage respondents said they worked for a radio circuit, with most of these being for the main hackney carriage company. Of all those naming companies, three quarters were hackney carriages. Six other private hire companies were named, each by one person. One of these was a hackney carriage working for a private hire company. This suggests the hackney carriage fleet is accessible by phone, but principally through hackney carriage networks with a small number available via private hire circuits.

People told us the ranks they used. 23 different locations were named including several suburban ranks. However, only New Street Station was mentioned by more than a few – 23% named this location. 11% said 'all' and 10% said 'city centre'. Broad Street obtained 8% of mentions, with Colmore Row 7%. Harborne, High Street and Navigation Street each got 5%. Selly Oak, China Town and Five Ways got 3% each.

Some of the locations mentioned were not totally clear, such as High Street, Selly Oak and 'Grand Central' as they could refer to several locations.

When asked if there were issues with ranks 41% felt there were too few ranks or spaces available. 16% were concerned about private hire abusing ranks, 10% were concerned about out of town vehicles using them. 14% just said ranks were not in the right place. 8% were concerned about over-ranking and 8% felt stewards were needed on busy nights to help rank operation. 2% were concerned about private vehicles using ranks to park on.

For all those responding, 69% said rank pick-ups were their main way of getting fares. 20% said phone bookings, 7% private contracts, 3% hailing and 2% school contracts. Several hackney carriages said they got most work from phone bookings. One private hire said their main work was from hailing, a regular misunderstanding given by app-based drivers (not just from this survey).

All gave a view if the moratorium should continue. Of the total, 63%, the majority said it should. 37% said not. Split between hackney carriage and private hire, 32% of hackney carriages did not agree the moratorium should continue. However, 43% of private hire felt that it should. Overall this does suggest a good level of support for retaining the moratorium.

People were asked why the limit should remain, and how it benefitted the public. This was a free-format questions, making summary more difficult, but effectively 45% said it ensured vehicles were always available at ranks, 24% said it reduced pollution and congestion and 10% said it kept public safety high. 7% said it encouraged clean, safe and well-maintained vehicles.

Many made additional comments, most being concern over the low levels of work and a major concern about out of town vehicles appearing to blatantly take work many felt should be theirs. Many other and varied views were provided.

Trade representative feed back

The trade meeting held as part of the study saw nearly 20 members turn up to listen to the results of the survey and provide their feedback. The unanimous view of those present was that the current demand for hackney carriages was low and that the number of vehicles remained well beyond the numbers needed for present demand. Many of the views of the individual drivers presented in the survey were reiterated.

For all the hackney carriage drivers, three organisations claim to represent in total about 90% of all hackney carriage drivers. Many drivers belong to two of the three organisations, given that each organisation has a slightly different focus. Numbers of members were provided which exceeded the number of drivers confirming this occurrence of dual memberships.

All three hackney carriage organisations supported continuation of the moratorium on the basis of no unmet demand being found that could be considered to be significant. All confirmed that members tended to trust their organisation to respond for them, rather than spend time providing individual inputs driver by driver. They all agreed that the level of response to the driver survey was sufficient and would adequately cover the current views of the industry in Birmingham at this time. This was confirmed at the meeting by a clear vote that no further driver consultation was needed, and that all present supported the retention of the moratorium.

The secretary of the RMT Union confirmed in writing that the believe the report is a fair representation of the situation on the ground and that there is no demand for any new licences to be issued.

A response was received in writing from one of the largest traditional private hire operators in the City. They felt there were more than enough hackney carriages to service ranks in the City from their observations. They raised concerns about need for proper provision for private hire vehicle pick-ups, particularly near to New Street station, and also mentioned concern about the Clean Air Zone introduction implications for service. They were also concerned about out of town vehicles providing service to City residents.

In conclusion, whilst there are a range of views within the trade, the overall view is that the present moratorium policy remains valid and appropriate, and that the observations of continuing reduction in usage of hackney carriages from ranks is correct. Though there are opportunities to grow the level of demand across the industry, there remain plenty of hackney carriage vehicles able to meet foreseeable demand.

7 Evaluation of unmet demand and its significance

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

For this current survey, the average passenger waiting time over all passengers is almost zero. The proportion of off peak hours in which there was any queue at all was just 2.53%. The proportion of people travelling in hours when there was a queue over a minute was just 0.01% (there was just one such hour, only affecting one person).

The rank data was collected in a neutral period, so the seasonal factor is 1.0. In terms of latent demand from those saying they have given up waiting for a hackney carriage at a rank in Birmingham, this value from the on-street questionnaires is 6.9%, a moderate level. The area does not tend to show peaky demand, so this factor is 1.0. That provides an estimate of the significance of unmet demand observed to be negligible but not zero.

Compared to previous surveys, the level of off peak hours where people find queues has reduced, as has the average passenger delay. The proportion of people travelling in hours with average queues a minute or more has increased as has the latent demand factor. However, none of these changes have been at a level of any real significance.

The committee can therefore be clear that, though there is a small amount of unmet demand, it is a very long way from levels that would be considered to be significant, and at a level that is very unlikely to become significant particularly quickly.

8 Summary, synthesis and study conclusions

This Hackney carriage unmet demand survey on behalf of Birmingham City Council has been undertaken following the guidance of the BPG and other recent case history regarding unmet demand and its significance. This chapter first provides a summary chapter by chapter. It then compares and contrasts the separate results into a synthesis of the current picture of demand and supply for hackney carriages and their passengers. Finally, a summary is provided to lay the foundations for the recommendations in the final Chapter.

Background and context

Our appointment began on 21st March 2017 in line with our proposal of January 2017. The survey included rank observations in March 2017, on street interviews in April 2017, canvassing of key stakeholders through the period to July and a wide trade review including a meeting with representatives at the end of the period.

Birmingham introduced a moratorium on the issue of new hackney carriage vehicle plates in 2008 after a period of no limit on vehicle numbers. However, the fleet has long had a requirement to be fully wheel chair accessible. The moratorium implies that any plates not renewed are not replaced. The current situation is that vehicle numbers reduced from the peak of 1,466 to 1,219 at the time of the rank work being undertaken. This is a 17% reduction in vehicle numbers with the past year seeing the largest reduction.

Private hire vehicle numbers have grown marginally since the last survey, but driver numbers continue to fall towards the level of a driver per vehicle. Operator numbers have also only shown increase in the last year, after a long period of declining numbers.

We are also well aware of the city attracting large numbers of out of town vehicles some of whom are understood to be acting under the present understanding of the recent Deregulation Act permitting service of demand by seconding of work to other area vehicles on the private hire side (as well as with out of town hackney carriages operating on local private hire circuits).

Rank observations

Rank observations based on those undertaken in the previous survey, plus addition of observations at the new New Street station private rank and some transfer of locations arising from road network changes, provided 263 hours of observed usage of ranks across the City.

During the observations, 13,434 vehicle arrivals and departures were identified, of which 10% were private cars at or near ranks. 10% were local private hire vehicles and 1% were goods vehicles. Some ranks saw little abuse at all, surprisingly the Erdington rank being the best performer in terms of lack of abuse. At the other end of the spectrum some 24-hour ranks generally used by hackney carriages at specific times are badly abused when less hackney carriages are using them. The worst case of abuse by other vehicles when active is the Sutton Coldfield rank, despite significant attempts to resolve this. The informal central Birmingham rank would need significant care to keep the level of abuse down were it formally introduced, as at present many different users are observed here.

Some of the ‘abuse’ was identified as relating to potentially legitimate access needed by private hire vehicles to their booked customers, but other was related to out of town vehicle operations.

Two people were observed using wheel chairs to access hackney carriages at ranks in this survey, more than the none observed in the previous survey. 14 other people appeared to have disabilities, with most of these being at the out of town Erdington rank.

An overview of the results demonstrates demand focussed on a few key ranks and on late night demand, but with a very good number of other ranks which are used, some over longer periods of time, albeit at lower levels compared to the main ranks. One informal location continues to make a significant contribution to people getting hackney carriages in the center of the City. The overall view of demand has a profile which is not heavily peaked given the long periods over which high demand is sustained.

Total weekly estimated demand appears to be 6% down since the 2014 survey. The top two ranks take 45% of observed demand between them (the private New Street station rank and its former replacement location, Navigation Street). Interestingly, the combined level of patronage from these two ranks is 44% more than it was in 2014, twice the level of growth of passengers at the station in the similar period.

The Broad Street super rank is the next largest with 8% of estimated overall demand. Colmore Row East, Cathedral sees 4% followed by six locations with around 3% each, and nine with 2%. The final seven ranks each have around 1% of demand providing some 26 active ranks in and around the City – a very good level of spread of demand for hackney carriages.

This – and the total numbers of passengers – specifically exclude the joint rank operated at Birmingham International Airport between Birmingham and Solihull vehicles – a private operation with its own characteristics.

Further, our individual rank reviews found that the bulk of operating ranks see good, very good or excellent levels of service, with just a small number of ranks only seeing 'fair' service for various reasons. None had less than 'fair' service.

Tests of the level of fleet operating on the busiest day at key locations identified just 21% of the fleet with 73% of these seen just at one site (albeit many times). The most active period was the 18:30 to 20:00 period on Saturday night near the private station rank. This suggests – even allowing for the Airport demand – observed peak demand could be met by up to 25% less vehicles than currently exist. This ties in with the continued reduction in vehicle numbers.

On street public views

291 people were interviewed across the City, with two samples in two of the suburbs with active ranks. A higher level of 64% said they had used a licensed vehicle in the last three months compared to the previous survey. The level of overall usage was also more than double at 3.8 licensed vehicle trips per person per month. The level of hackney carriage usage, at 1.4 trips per person per month is also higher than in 2014.

Levels of access to licensed vehicle by direct phone remained similar to the last survey but mobile or smart phone use had increased, whilst hailing had reduced significantly and rank use was down to 16%. A larger number of companies were named in this survey and people seemed to be making use of more choice although the level of single company quotes is higher than in many other places, suggesting loyalty can be high. Last time the hackney carriage phone number was the dominant company phoned as well – now there is another new entrant with a higher level, with the hackney carriage phone network now second. Many other companies from the last survey have also lost their market share now.

However, the next four Birmingham based private hire companies have all increased their shares since the last survey. They have between 9% and 5% of mentions, with four other companies with 4% each. There are clear mentions of out of town operators in the listings.

Our survey found that hackney carriages are very visible right across the City. The level not remembering their last use of a hackney carriage has increased a little, but the overall level at 42% remains good compared to many other places around England.

Overall, we believe the total market for licensed vehicle services has grown, as has the share of hackney carriages of this, although hailing and rank use have suffered from the levels of app and phone competition, giving an overall reduced level of patronage from these sources.

Whilst there is good overall knowledge of ranks, there remains clear benefit from provision of a clear map of all active ranks and possibly ensuring each rank has a clearly advertised name. There were no public requirements for new ranks. Just 15% of people said they had issues with hackney carriages but nothing was really significant. More people said items that would encourage more use, but as is usual the focus was on cost.

The results of the questions on disability suggest a higher level of need of adapted vehicles in the City than in other places. Most needed wheel chair accessible vehicles.

The measurable latent demand level was 6.5%, not particularly high. These were shared almost equally between Broad Street, New Street station and Colmore Row.

Key stakeholder views

Suburban supermarkets had phone links for customers, but some also said customers used nearby active ranks. The city centre sample found one with high use of hackney carriages from the rank and another with no real use of licensed vehicles at all. Hotels also mainly used private hire but were also aware of ranks their customers did use. The same was true for public houses. The only night club responding said their customers used ranks. Restaurants tended to use phone for vehicles.

Main police concerns were regarding the out of town operations which led to many issues. They also felt ranks needed to be reviewed, but by active trade involvement with the Council. A disability representative said that any issues arising were dealt with promptly and well.

Trade views

An all-trade survey saw a 4% response from hackney carriage and 0.3% for private hire, an overall 1%, but from a very large contingent. Results were also shared with all key trade representatives who felt they were a true reflection of the current situation.

The respondents provided a high level of expertise, higher than in many other recently surveyed locations. The highest proportion, 38% had worked six days, with average hours of 39, relatively typical. There were several who worked two to four days. 12% said they avoided times they might encounter drunken, violent or abusive customers. The top two reasons stated – both by 24% of respondents – were working at busy times, and avoiding congested traffic.

There was little evidence of much if any double-shifting of vehicles. A relatively high number of hackney carriages – over a third – worked for one hackney carriage radio company. Six other private hire companies were named by hackney carriages drivers as ones they worked for.

Although many ranks were named including many suburban, only New Street station had a significant level of mention (23%). The next highest mention was Broad Street at 8% and Colmore Row (which one uncertain) 7%. Many felt there were too few ranks or spaces, 16% were concerned about private hire abuse and 10% about out of town vehicle abuse of ranks.

69% of those responding said their main way of getting fares was from ranks. Interestingly an app-based respondent suggesting their main way of getting fares was from 'hailing', although this could have been a result of not having 'via an app' as a specific option.

63% agreed the moratorium should remain, including 43% of private hire respondents. People gave reasons they felt this benefitted the public, with 45% saying it ensured vehicles were always available at ranks, 24% saying it reduced pollution and 10% that it kept public safety high.

A face to face meeting with key trade representatives found support for the findings and detail of the study, with all three organisations confirming their view in writing after. A large private hire operator also responded with a main concern ensuring adequate pick-up facilities for their legitimate operations.

Formal evaluation of significance of unmet demand

A key element of this survey is to test if any unmet demand which is observed at ranks is significant according to Section 16 of the 1985 Transport Act. Further detail is given in Chapter 7 above. As is industry standard practice, we used the industry standard "index of significance of unmet demand" (ISUD). We found that the elements of the index, and the overall result, were all very small. All were a long way from the levels which would imply that the unmet demand identified was significant in terms of Section 16 of the 1985 Transport Act.

Levels of off peak hours with queues were reduced compared to 2014, as was the average passenger delay. However, latent demand and the proportion of those travelling in hours with average queues over a minute have increased, but only very marginally.

In summary, there is no evidence of any observed unmet demand being significant using the standard industry tool.

Synthesis

The City of Birmingham retains an active fleet of hackney carriages, servicing not just the City centre but many suburbs, and available to people by phone as well as at ranks and from hailing. There are a high number of active ranks although key activity is focussed at a smaller number, the top two being related to the key New Street railway station.

Introduction of the new, purpose built private provision at the Station appears to have increased usage there by more than the increase in numbers of passengers using the station. The previous provision at Navigation Street continues to see passengers however, probably related to the number of exits which are close to this rank and the general trend of direction people wish to head when they leave the station (i.e. towards the financial and pleasure areas of the City).

Discussion with the public suggests that the overall market for licensed vehicles, and overall levels of usage of both private hire and hackney carriage have increased, although the impact of 'apps' seems to have reduced usage of ranks, hailing and some less go-ahead private hire companies, whilst others have benefitted by using technology. The rank-based level of demand is, however, down 6% compared to 2014, consistent with a continuing fall in the number of vehicles active.

Reduced demand has meant an improved service for those remaining with using ranks, and two components of the industry standard index of significance of unmet demand reflect this. Other elements remain insignificant.

The trend seen in many other studies where off peak service has deteriorated as hackney carriages increase their operation on private hire or hackney radio networks sees the opposite effect in Birmingham – the fleet has always had high levels of linkage to phone bookings such that the hackney carriage fleet still provides the second highest way of getting licensed vehicles by phone in the City. Its top place has only been surpassed by a company using ‘apps’.

Despite the falling rank demand, the service provided to those using ranks has remained between good and excellent at nearly all locations.

Conclusions

Whilst there are causes for concern in terms of the levels of overall rank demand declining, service levels to customers of hackney carriages have improved and there are some places where demand has in fact increased. Overall licensed vehicle demand is up and there are opportunities for the hackney carriage trade to take advantage of their position to focus on and sell their high levels of customer service to their benefit. There is no evidence either from the ISUD index or any other evidence gathered that there is any unmet demand for the services of hackney carriages currently across the Birmingham licensing area which can be seen to be significant in terms of Section 16 of the 1985 Transport Act.

It is also very clear that the current moratorium policy remains appropriate and a key factor helping maintain some stability in the present situation. It remains supported by all elements of the licensed vehicle trade and acts in the public interest at the present time.

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9 Recommendations

On the basis of the evidence gathered in this Hackney carriage unmet demand survey for Birmingham City Council, our key conclusion is that there is no evidence of any unmet demand for the services of hackney carriages either patent or latent which is significant at this point in time in the Birmingham City Council licensing area. The committee is therefore able to retain the current policy of a moratorium on issue of new hackney carriage vehicle plates and defend this if necessary.

Marketing, signing and identification of active hackney carriage ranks remains an important way that hackney carriage services could be helped to continue their valuable contribution to the City economy.

There are places where highways enforcement of ranks remains necessary and would help improve the potential for service by hackney carriages.

The current actions being taken to reduce the risk to the public of vehicles operating in the City whose drivers and vehicles are not to the current expected high local standards are important and must be supported and strengthened as far as possible. It is, however, accepted that this may need national action and amendments to legislation which will be very hard to attain without significant joint effort from the council, police and trade.

There do appear to be opportunities for the hackney carriage, and private hire, trades to develop and grow their business by taking advantage of all current and legitimate options to focus on customer safety and service.

Appendix 1 – Statistics of industry

Birmingham City

Limit removed 1996 and moratorium applied 16 Oct 2008

	hcv	phv	lv total	hcd	phd	dd	total d		Operators	% hcv WAV	% phv WAV
1994D	725			811				**1994D**		100	
1996	750			*877*						100	
1997 08	750	2800	3550	*953*						100	
1997D	837	3750	4587	1010	3950		4960	**1997D**		100	
1999 05	944	4000	4944	*1105*	*4225*		5330	**1999 05**		100	
1999D	1019	3541	4560	1200	4500		5700	**1999D**	95	100	
2001D	1019	3540	4559	1200	4500		5700	**2001D**	95	100	
2004D	1120	3526	4646	1288	4386		5674	**2004D**	79	100	
2005D	1200	5000	6200	1500	6500		8000	**2005D**	73	100	
2007D	1296	6500	7796	1500	6500		8000	**2007D**	73	100	
2008C	1332	4889	6221	1448	6231		7678.5	**2008C**	85	100	
2009D	1466	5203	6669	1395	5962		7357	**2009D**	96	100	
2010C	1462	5500	6962	*1413*	*5993*		7406	**2010C**	*98*	100	
2010N	1462	5500	6962	*1413*	*5993*		7406	**2010N**	*102*	100	
2011D	1404	4943	6347	1431	6024		7455	**2011D**	104	100	
2012N	1392	5102	6494	*1410*	*5666*		7076	**2012C**	*98*	100	
2013D	1342	4363	5705	1388	5308		6696	**2013D**	92	100	
2014N	1255	*4096*	*5351*	*1370*	*5112*		6482	**2014N**	*87*	100	
2014C	1262	*4074*	*5336*	*1360*	*5014*		6374	**2014C**	*85*	100	
2015D	1241	4052	5293	1351	4916		6267	**2015D**	81	100	
2016C	1244	4159	5403	1335	4873		6208	**2016C**	79	100	
2017C	1219	4192	5411	1323	4779		6102	**2017C**	89	100	

Appendix 2 – Rank observation hours

See separate document

Appendix 3 – Detailed rank observation results

See separate document

Appendix 4 – On street survey results

See separate document

Appendix 5 List of Key Stakeholders consulted

Key consultee	Response
Supermarkets	
Tesco, Hockley	N
Asda, Kings Heath	Y
Central England Co-op, Stirchley	R
Waitrose, High St, Harborne	Y
Sainsbury's, Alcester Road	Y
Tesco, New Street, Central Birmingham	Y
Sainsbury's Union Street, Central Birmingham	Y
Morrison's, Five Ways	R
Hotels	
Hotel La Tour	Y
Hotel du Vin and Bistro, Birmingham	Y
Park Regis, Birmingham	Y
Rowton Hotel, Birmingham	Y
Bloc Hotel	Y
Hyatt Regency, Birmingham City	Y
Restaurants / Cafes	
Adam's Restaurant	R
Cote Brasserie	N
Piccolino	N
Jekyll and Hyde	Y
Viceroy Tandoori	Y
Entertainment	
Odeon, Birmingham	R
Mac Arts Complex, Edgbaston	Y
New Alexandra Theatre	R
Public Houses	
Hello at the Victoria	Y
The Wellington	Y
Bristol Pear	Y
Bacchus Bar	Y
The Rose Villa Tavern	Y
Prince of Wales	R
Night Clubs	
Nightingale Club	R
Sugar Suite / Velvet Music Rooms	Y
Snobs	N
Other key stakeholder groups	
City Hospital	R

Police, Licensing Officer	Y