



TRAFFIC + TRANSPORTATION

HACKNEY CARRIAGE & PRIVATE HIRE RESEARCH

- + Unmet demand studies
- + Rank operation reviews
- + Licensed vehicle mystery shoppers
- + Fare modelling
- + Fees reviews
- + Expert advice on taxis

CTS : reliability and innovation in reviewing licensed vehicle services



Our classic unmet demand studies provide a comprehensive and vigorous way of identifying any unmet demand for hackney carriages, and its significance in terms of Section 16 of the 1985 Transport Act. Our surveys employ industry leading data collection methods and our reporting is acclaimed for its clarity and transparency. Led by Ian Millership, one of the country's acknowledged foremost experts on taxi consultation, we continue with every new project to develop and innovate whilst ensuring conclusions remain to an industry leading standard. Within the current economic climate CTS are working to ensure you receive the most comprehensive and effective study at the best value delivered promptly.

IAN MILLERSHIP (MSc MCiHT CMILT) Our taxi expert has specialised in taxi demand studies since 1989, with significant involvement in well over 50 studies, mainly as lead consultant. He is recognised nationally as an expert in the field – along with his wealth of experience in demand studies, he has also worked with academics from the University of Leeds, licensing officers and their groups (including NALEO), and various trade organisations on developing taxi related strategies. He has undertaken projects for the Department of Transport regarding taxis within local transport plans, helped identify local expectation of the taxi service, and has had several papers published focusing on the taxi trade. He is currently Vice-Chair of The National Association of Taxi Users. Ian's unrivalled expertise and the methods of data collection and analysis he has developed makes our demand studies the best on the market, and a firm basis on which to make future licensing decisions.

Each study is carefully tailored to meet the specific requirements of the client, and draws on a suite of data collection methods carefully following the Department for Transport Best Practise Guidance April 2010.

RANK OBSERVATIONS : CTS focuses on use of defensible, discreet and robust video collection of passenger and vehicle movements at ranks whenever possible. Together with careful observation of the footage and further analysis by our taxi expert, our rank data ensures accurate estimation of both vehicle and passenger waiting times, alongside observation of any operational issues affecting service to the public. The observations also carefully differentiate between types of passenger delay so that any additional vehicle calculations are based on defensible information.

CONSULTATION WITH THE PUBLIC : We talk to a representative sample of the public in appropriate locations within the licensing area, using a carefully structured questionnaire developed in association with each authority. The aim of these consultations is to identify what the public expect of the local licensed vehicle service including identification of any latent demand – such as where people have been unable to access licensed vehicle services for whatever reason.

LICENSED VEHICLE TRADE AND KEY STAKEHOLDERS CONSULTATION : Case history requires comprehensive consultation with those involved in the licensed vehicle trade. This often takes the form of a drop-in trade consultation day covering both hackney carriage and private hire representatives, supported by detailed discussion with specific trade representatives. This is led by our taxi expert making use of a driver questionnaire to elicit operational information in a structured manner. All other Key Stakeholders are contacted for their views using several methods, as laid out in The Department for Transport Best Practise All responses are summarised in our final report.

STATISTICAL COMPARISON : Department for Transport (DfT) collected statistics from 1994 to 2007

for licensed vehicles. These statistics were gathered together and a 2010 set of figures added by the National Private Hire Association (NPHA). The DfT have now produced national figures for March 2011. Comparison for an authority is undertaken using this database of information, and drawing from nationally available population estimates. The NPHA also regularly publishes comparison of hackney carriage fares and these are also used to undertake a comparison of the local fares as well as how they have changed over the last decade.

POLICY CONTEXT : A review is undertaken to identify how licensed vehicle policy interacts with other local policies, including the Local Transport Plan, social and economic policies for an area.

EQUALITY ACT CONSIDERATION : The Equality Act 2010 has been enacted. However, one section which requires any authority with a limit on hackney carriage numbers to meet a set level of vehicles that are wheel chair accessible is yet to be applied, prior to a forthcoming consultation period. Our studies generally include a section applying the expected level to the current number of hackney carriages in the study area, providing clear guidance on the likely impact on any actual or proposed limits of this legislation.

Other Options
There are several other options we have undertaken which can be added in to a classic demand study, or undertaken as separate options, depending on the local council present requirements.

LITE SURVEYS : We have undertaken a number of bespoke 'lite' surveys for authorities who have undertaken regular reviews over the years and do not consider that there has been significant change since the last survey. Therefore some elements of the

standard full unmet demand survey can be reduced or taken out of the current study without reducing the robustness of the review. This can provide a very cost effective review option for an authority.

BLUETOOTH LOGGING : Most licensed hire vehicles carry at least one device (such as a mobile phone or SatNav system) with Bluetooth enabled: With our Bluetooth loggers, we are able to log each time such a vehicle visits a rank or other location over days, weeks or even months. In conjunction with control counts taken by manual or video observation, this information can be used to build up an in depth record of how a taxi rank is used over a longer period of time, as well as other useful information such as journey times, shift patterns and waiting times – all at a fraction of the cost of a similar length survey carried out by manual or video means.

VEHICLE REVIEW : A number of characteristics of the licensed vehicle fleet can have an impact on the service provided to the public. Both vehicle age and type can be reviewed using public register data. With additional information from the Council, a review of the current ownership structure of the industry can also be undertaken. Trade information can also provide statistics on the use of radio networks by the hackney carriage trade, the amount of double-shifting of drivers, and how much interplay there is between the hackney carriage and private hire fleets – all parameters that can determine the nature and level of provision of service to the public.

MYSTERY SHOPPER : We are able to undertake either able bodied or disabled mystery shopper journeys in an area, to the specification of a local council. This enables specific details of service to the public to be tested (eg how well those with a disability are provided for, issues of over-charging or other specific service issues such as actual knowledge of drivers of the area).

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REVIEW OF GEOGRAPHY OF INDUSTRY :

In some cases, drivers and owners of vehicles are not confined to the local area. This can occur when an authority has specific charges which are favourable to people wishing to service licensed vehicle demand, sometimes in other areas. In other cases, demand in an area can be so attractive that others from neighbouring areas are attracted to another licensing area. Driver or owner geographic spread can be analysed and reviewed.

FARES AND FEES : Issues related to hackney carriage fares and fees can be investigated beyond those summarised in the national comparison data. Likely remuneration to hackney carriage drivers can be estimated from data collected from rank surveys whilst the way in which costs contribute to the overall economics of the industry can be investigated using a fares model based on others used around the United Kingdom, if necessary working with those in the industry to fine tune appropriate parameters. We have also undertaken studies where significant consultation with private hire operators has been undertaken to enable the setting up of a private hire consultee panel.

OVERSUPPLY ISSUES : Whilst we are aware that some authorities considering the issues around having too many hackney carriage vehicles within a non-limited policy require a full demand survey, we have undertaken work where an authority does not need such a survey but rather one tailored to the impacts and issues arising from congestion effects of having a large fleet of hackney carriage vehicles, relatively small amounts of rank space and reducing demand. We are willing to work with authorities to demonstrate the current impact of an excess of vehicles and to identify how many vehicles are needed to meet both observed demand and any other latent or potential demand for hackney carriages.

BESPOKE ANALYSIS : Other specific issues can be investigated as required by particular local authorities, trade groups or other bodies who either use or have customers using licensed vehicles. Studies undertaken include review of ranks at transport interchanges and design of ranks for private operators such as shopping centres or transport interchanges. This includes work for those in areas beyond the United Kingdom.

CURRENT & FUTURE DEVELOPMENTS :

CTS are at the forefront of ongoing developments within the licensed vehicle industry. We keep abreast of potential changes, both legislative and technological, by keeping in touch with key players at government, council, trade and consumer levels. We believe that hackney carriage and private hire vehicles are a crucial part of overall public transport provision, and are key to moving the world economies forward in a sustainable manner. To this end, we believe robust facts are essential to understand the potential for continual development of the services provided.