

APPENDIX 1

Executive summary

CTS Traffic and Transportation were appointed by Southend-on-Sea Borough Council to undertake their Demand survey 2015 on 29th May 2015. This report presents the results of all investigations undertaken to provide a database of robust information on which a decision can be taken by councillors in regard to the hackney carriage vehicle limitation policy. All research was undertaken in line with the current Department for Transport Best Practice Guidance (April 2010) and taking advantage of the extensive research undertaken by the Law Commission in their recent review of licensing.

Southend-on-Sea is a unitary authority with its own transport policy set within its own Local Transport Plan. This encourages licensed vehicles supporting the access that licensed vehicles can provide. This reduces social exclusion and enables everyone to be able to get around even when other public transport is not available. The LTP also supports adequate provision of rank facilities.

Hackney carriage policy sees a limit which has been retained since 1976 but with regular testing and issue of plates where necessary. The result has been equal growth in both the limited (hackney carriage) and non-limited (private hire) parts of the licensed vehicle trade – adequate evidence that the limit policy is in tune with market forces. Further, despite continued contraction in the overall demand for licensed vehicles in the area, the number of hackney carriages has not fallen giving a higher level of stability than might otherwise occur were market forces to apply to both sides of the trade.

The fleet currently sees WAV focussed on the hackney carriage fleet, but accessible by a wide range of methods since most are allied to one radio operator. Some hackney carriages remain independent but in general people in the area tend not to distinguish between the two parts of the trade as significantly as can occur in other areas. This is a benefit to the public.

300 hours of rank operation were observed at the ten main active ranks in the area. There are four ranks taking 80% of estimated weekly rank demand. London Road takes a third of trade, followed by Leigh Station (23%), Southend Victoria Station (13%) and Heygate Avenue (11%). Overall demand on the hackney carriage observed side is 9% lower than in 2009 but higher than that observed in the 2012 survey. This demonstrates there remains an impact of the recession in the area, but some signs of recovery. The fall in private hire vehicle numbers supports this conclusion.

The level of vehicles involved in providing the service to ranks was low – 23% of the fleet was observed active on the Friday of the survey. This confirms both spare capacity for rank service and a dominance of hackney carriages undertaking booked work. Initial industry standard ISUD index estimations suggested there was unmet demand, and that this was at a significant level. However, the occurrence of a major event on the Saturday, together with observations being during the third week of

Ramadan, led to sensitivity tests which demonstrated that in fact there were currently sufficient vehicles available to meet 'typical' levels of demand and only issues at times of more extreme demand levels.

299 people were interviewed in the streets across Southend-on-Sea including samples in Thorpe Bay and Leigh as well as around the town centre itself. The level of usage in the last three months of licensed vehicles at 45% was the same as in 2012. The average number of trips per person per month was 2.6 for all licensed vehicles and 2.2 for hackney carriages suggesting almost a one-tier system in Southend. This is confirmed by 18% saying they use ranks, 2% hailing and 79% booking vehicles by phone. It is also supported by the main company being phoned found to be the hackney carriage radio company – together with high loyalty to a small number of private hire or phone booking companies overall.

People knew and appreciated hackney carriages although nearly a quarter could not remember when they last used one. A high proportion – 10% - say they use hackney carriages almost daily. Most used ranks were well-known albeit by a wide range of colloquial names, suggesting there would be benefit in better advertising of ranks and their formal names. There was no significant demand for new rank provision.

Principal need for disability friendly vehicles focussed on the WAV style rather than any with other adaptations – supporting the current focus on increasing the level of such vehicles in the fleet. This might support a move towards a 100% WAV style fleet although any such policy change would need further focussed evaluation and consultation.

Stakeholders had positive views about licensed vehicle service, and there was a share between them phoning for vehicles for customers and being aware that their customers were able to get vehicles from ranks where these existed.

Trade response demonstrated good experience within the trade. It confirmed that the level of independents was low (6% not on any radio circuit). The average week from the sample was five to six days and 47 hours. Reasonable coverage of ranks was provided. Drivers supported the retention of the limit and also gave the reasons why they felt this was in the public interest.

Overall the hackney carriage and overall licensed vehicle market in Southend-on-Sea remains depressed following the recession. There is almost a one-tier system with a high proportion of bookings made with vehicles which are hackney carriage. People appreciate the service provided, the level of ranks, and reward this with loyalty to those providing the service. There is a high level of correlation between the action of market forces and the planned / evaluated growth on both sides of the trade.

The overall conclusion is that there is no significant unmet demand for the services of hackney carriages in Southend-on-Sea at this point in time. This conclusion covers both patent and latent demand. There is strong evidence to demonstrate that the limit policy is having benefit which is strongly in the public interest, although regular review of this is also essential (the next study should be within the three year recommended horizon).