APPENDIX 1

Mid Sussex District Council
Unmet demand survey 2022

December 2022

Executive Summary

This Unmet demand survey 2022 has been undertaken on behalf of Mid Sussex District Council following the guidance of the April 2010 Department for Transport (DfT) Best Practice Guidance document, and all relevant case history in regard to unmet demand. This Executive Summary draws together key points from the main report that are needed to allow a committee to determine from the facts presented their current position in regard to the policy of limiting hackney carriage vehicle licences according to Section 16 of the 1985 Transport Act. It is a summary of the main report which follows and should not be relied upon solely to justify any decisions of a committee but must be read in conjunction with the full report below.

It is interesting to note that the below, essentially the previous report Executive Summary, remains as valid as it did despite the ravages of several years of the pandemic. This strengthens the conclusions summarised below.

There is evidence that the retention of the limit on the number of hackney carriage vehicles continues to provide public benefit. This is primarily in providing stability not just to the hackney carriage fleet but also to the private hire fleet closely related to the hackney carriage by the existence of several strong mixed-fleet operating companies. The value of independent operators is also strong and clear. The resulting operation is well appreciated by the travelling public in the area.

The good service provided needs to be supported by both local and strategic councils seeking to provide opportunities for council-provided ranks particularly as parts of the central areas are redeveloped. This will grow in importance over time as opportunities are provided by the refreshing of the central areas of each settlement, and as the possible dependence on rail demand becomes more risky as traditional patterns of rail use disappear with the new normal of less commuting and more leisure travel.

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1 General introduction and background

Licensed Vehicle Surveys and Assessment (LVSA) is a joint venture between CTS Traffic and Transportation Ltd (CTS) and Vector Transport Consultancy. These two companies have hitherto been the two leading practitioners of hackney carriage unmet demand surveys in recent years who joined forces in early 2017. The combined experience of this joint venture covers more than 244 similar studies undertaken since 1999. The contracting company for this survey, CTS, also undertook the previous three surveys for Mid Sussex and therefore has unrivalled knowledge of the operation of licensed vehicles in the area.

Mid Sussex District Council is responsible for the licensing of hackney carriage and private hire vehicles operating within the Council area and is the licensing authority for this complete area. Further details of the local application of Section 16 of the 1985 Transport Act with regard to limiting hackney carriage vehicle numbers is provided in further Chapters of this report. Hackney carriage vehicle licences are the only part of licensing where such a stipulation occurs and there is no legal means by which either private hire vehicle numbers, private hire or hackney carriage driver numbers, or the number of private hire operators can be limited.

This 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 first set by the Town Polices Clause Act 1847. This has been amended and supplemented by various following legislation including the Transport Act 1985, Section 16 in regard to hackney carriage vehicle limits, and by the Local Government Miscellaneous Provisions Act 1976 with reference to private hire vehicles and operations. 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 five most recent reviews were by the Office of Fair Trading in 2003, through the production of the BPG in 2010, the Law Commission review which published its results in 2014, the All-Party Parliamentary Group on Taxis deliberations in 2018 (resulting in the publication of part revisions of the BPG) and the recently concluded consultation on review of the remainder of the BPG. None of these resulted in any material change to the legislation involved in licensing.

However, in November 2016, the DfT undertook a consultation regarding enacting Sections 167 and 165 of the Equality Act. These allowed for all vehicles capable of carrying a wheelchair 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 wheelchair
- Not make any additional charge for doing so
- If the passenger chooses to sit in a passenger seat to carry the wheelchair
- To take such steps as are necessary to ensure that the passenger is carried in safety and reasonable comfort
- To give the passenger such mobility assistance as is reasonably required

This was enacted from April 2017 but continued issues led to pressure for further change (some of which came in the second of two 2022 Acts). These two new 2022 Acts make small but significant changes. The first makes it mandatory for any licensing authority in England that has information about a taxi or phv driver licensed by another authority that is relevant to safeguarding or road safety concerns in its area to share that information with the authority that issued that drivers licence, whilst the second amends the Equality Act to place duties on taxi and phv drivers and operators such that any disabled person has specific rights and protections to be transported and receive assistance when using a taxi or phv without being charged extra.

The Deregulation Act had two clauses relevant to taxi licensing – relating to length of period covered by licences and allowance of operators to transfer work across borders (both enacted October 2015). The 2022 Acts are the "Taxis and Private Hire Vehicles (Safeguarding and Road Safety Act) (31 March 2022)" and the "Taxis and Private Hire Vehicles (Disabled Persons) (28 June 2022)".

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. However, there is currently no expected date either for publication of the Government response to the Law Commission, nor indeed any plans for further revisions to legislation.

The date for publication of the new BPG remains 'imminent' but unknown, nor is the level of actual change that will occur fully known.

A more recent restriction, often applied to areas where there is no 'quantity' control felt to exist per-se, is that of 'quality control'. This is often a pseudonym for a restriction that any new hackney carriage vehicle licence must be for a wheelchair accessible vehicle, of various kinds as determined locally. In many places this implies a restricted number of saloon style hackney carriage licences are available, which often are given 'grandfather' rights to remain as saloon style.

Within this quality restriction, there are various levels of strength of the types of vehicles allowed. The tightest restriction, now only retained by a few authorities only allows 'London' style wheelchair accessible vehicles, restricted to those with a 25-foot turning circle, and at the present time principally the LTI Tx, the Mercedes Vito special edition with steerable rear axle, and the Metrocab (no longer produced). Others allow a wider range of van style conversions in their wheelchair accessible fleet, whilst some go as far as also allowing rear-loading conversions. Given the additional price of these vehicles, this often implies a restriction on entry to the hackney carriage trade.

Some are now considering if similar changes might be made to encourage greater introduction of a more sustainable vehicle fleet, particularly in light of the suggestion in the BPG revision consultation that alternatives to limiting numbers should be applied if they were felt to achieve the same aims. However, it is concerning that none of the alternatives include any requirement to prove that the policy has actually achieved its aims.

Unmet Demand Studies

After introduction of the 1985 Transport Act, Leeds University Institute for Transport Studies developed a tool by which unmet demand could be evaluated and a determination made if this was significant or not. The tool was taken forward and developed as more studies were undertaken. Over time this 'index of significance of unmet demand' (ISUD) became accepted as an industry standard tool to be used for this purpose.

Some revisions have been made following the few but specific court cases where various parties have challenged the policy of retaining a limit.

Some of the application has differed between Scottish and English authority's. This is mainly due to some court cases in Scotland taking interpretation of the duty of the licensing authority further than is usual in England and Wales, requiring current knowledge of the status of unmet demand at all times, rather than just at the snap-shot taken every three years.

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".

Unmet Demand Case History

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, industry standards suggest that 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, although apart from the general guidance of the BPG there is no clear stipulations as to what this means in reality.

Conclusion to Chapter

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 generally considered to be insured for their journey.

For Mid Sussex, the standard split between hackney carriage and private hire drivers remains, with neither driver being able to drive the alternative kind of vehicle.

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

Further, introduction of recent methods of obtaining vehicles, principally using 'apps' on mobile phones have also led to confusion as to how 'apps' usage sits with present legislation. This continues to be debated with the key issue being if obtaining a vehicle using an app (most of which rely on proximity to choose a vehicle) is a pre-booking or not, given the often minimal time between the person making known their need on the app and a vehicle meeting that need.

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

Coronavirus

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

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

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

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

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

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

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

Overall, the pandemic led to a significant period of lack of business for both hackney carriage and private hire vehicles, in various ways as the pandemic developed. Some of the impacts of this are discussed in public and driver attitude chapters below, as well as review of impact on demand in the rank chapter. More significant was the reappraisal of many as to their involvement with the industry, and the general job market churn that was instigated not just in the taxi arena. In many areas there is clear knowledge that many who planned to retire brought that date forward whilst others found that the certainty of income from delivery driving was preferable to the vagaries of taxi passenger demand. Yet others found the shortage of private hire drivers meant more requirement on hackney carriages in the daytime, in turn meaning they could earn more in the week, and not be reliant on servicing less-preferable customers in the early hours of Saturday and Sunday.

A further issue we have observed is that even pubs, restaurants and night venues are now reducing their opening hours or days in reaction to rising costs and staff shortages. This can lead to taxi demand in an area becoming peaky or peakier with such change.

Further, the impacts of the developing war in Ukraine and other economic changes partly arising from Brexit is again putting pressure on costs of providing licensed vehicle services. Rising fuel prices have also added to the issues. The days when the main aim of a demand survey was checking if passenger demand had changed to see if supply remained sufficient have now been replaced by a much wider research need to identify both demand and supply side changes. Even long-standing areas with limited hackney carriage vehicle numbers have been impacted by having spare hackney carriage vehicle licences available for the first time in decades.

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2 Local background and context

Key dates for this Unmet demand survey 2022 for Mid Sussex District Council are:

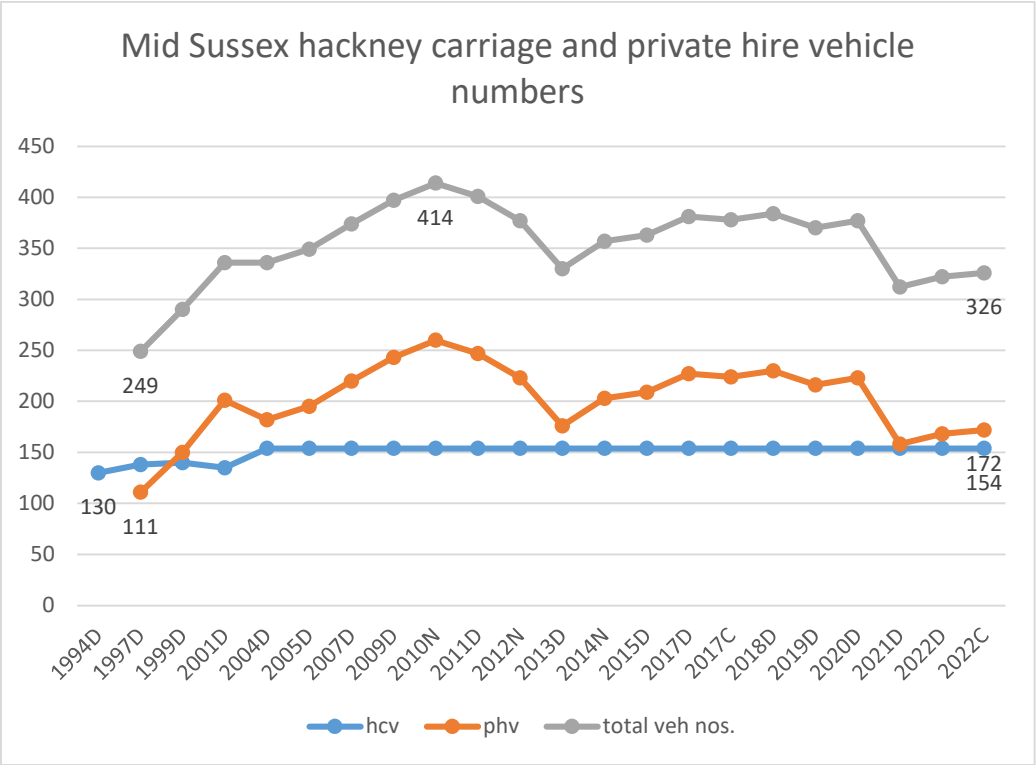
- CTS Traffic and Transportation appointed on 23rd March 2022
- as confirmed during the inception meeting for the survey held on 5th April 2022
- Survey was carried out between April and September 2022
- Pedestrian street survey work occurred in May 2022 (including an on-line option)
- Video rank observations occurred in mid-May 2022 (away from direct impact of any bank holidays)
- Vehicle driver opinions and operating practices were canvassed using an all-driver survey issued by the council and available for completion between April and June 2022
- A WAV user questionnaire was available between May and July 2022 promoted by the local authority
- Key stakeholders were consulted throughout the period of the survey

Mid Sussex District Council forms part of the two-tier authority of West Sussex County Council. The authority has a current population of 152,600 for 2021 initial census values (compared to 154,207 using previous estimates from 2011, and 145,900 using the 2017 estimates). This suggests although the area has seen growth in the last four years since the last survey (to 2021 not 2022) it is less than was originally expected.

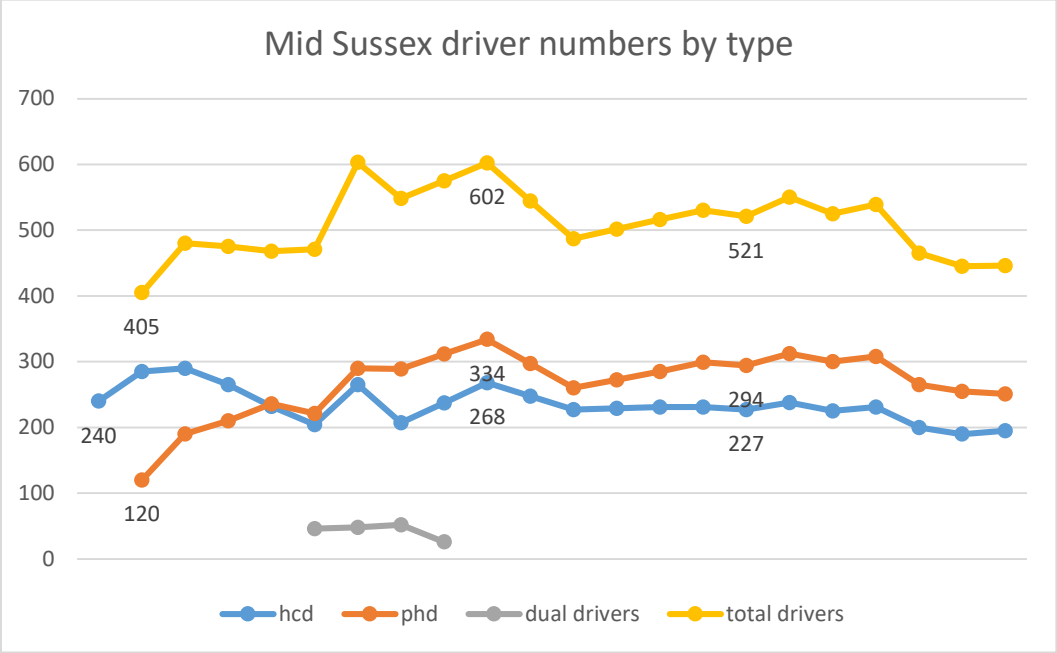
In terms of background council policy, West Sussex County Council are the authority that deals with overall transport policy. This means that rank provision is undertaken at County level along with traffic regulation and its enforcement, although as with other authorities the County ensures significant involvement of Mid Sussex Council in such decisions.

However, all licensing authorities have full powers over licensing the vehicles, drivers and operators serving people within their area. Mid Sussex District Council has chosen to utilize its power to limit hackney carriage vehicle numbers, and as far as we are aware has done so since at least 2003 in the current format. The authority retains a mixed vehicle hackney carriage fleet.

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. Due to the comparative size, there are three graphs in all.



Licensing Statistics from 1994 to date - vehicles



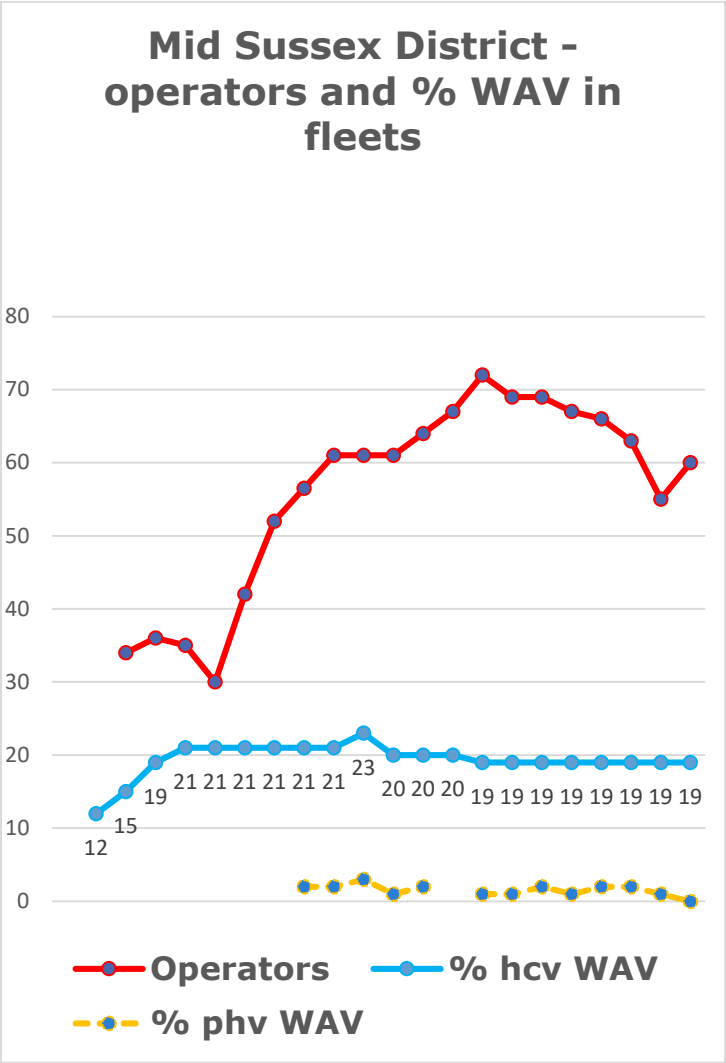
Licensing Statistics from 1994 to date - drivers

The graphs demonstrate that the current number of hackney carriage vehicles has been 154 since 2004. Prior to this, numbers had increased by 18%. Private hire vehicle numbers rose to a peak some 134% more than the level in 1997 but have since that 2010 peak level dropped to a low in 2013, with resurgence to 2020 but then strong decline in the first year of COVID with some gentle rise since, leaving their numbers currently just over a third above their number in 1997. At the lowest point there was almost parity in numbers with the hackney carriage fleet and private hire numbers are no longer the dominant vehicle type at present.

Driver numbers in the area are interesting. Before the time the current limit on vehicle numbers was set, there were more hackney carriage drivers than private hire, with about equal numbers of private hire drivers and vehicles.

Since the current limit of hackney carriages has been in place, there have been more private hire drivers than hackney carriage, with hackney carriage driver numbers increasing in 2011 then numbers remaining stable to 2017, whilst private hire driver numbers peaked in 2011, then dropped but then grew as private hire vehicle numbers grew. The pandemic hit both kinds of driver numbers almost equally in the first year, followed by slower decline and some recent pick-up in hackney carriage driver numbers not yet mirrored by private hire.

Information is also available from these sources to show how the level of wheelchair 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 wheelchair 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

These figures show that private hire operator numbers have generally increased in the area over time, then declined since 2018 to a low in the latest DfT numbers, with some resurgence between then and the time of the fresh survey in May.

In terms of wheelchair accessible levels of vehicles, the current 19% remains very similar to the level first attained in 2001, although there was a high point of 23% in 2012 and the current level is marginally less than the typical level since 2001. Only a small number of wheelchair accessible vehicles existed in the private hire element of the trade with both now having been withdrawn from the fleet, leaving those needing WAV dependent entirely on the hackney carriage fleet of the area.

The hackney carriage level of WAV is also only marginally less than the equivalent DfT value of 22% for all non-fully WAV fleets in England (the average of 40% includes a significant number of 100% WAV and no-WAV fleets and is misleading).

Limit Policy Review

Mid Sussex District Council undertakes regular review of its policy to limit hackney carriage vehicle numbers in line with the Best Practice Guidance from the Department of Transport (BPG). The previous surveys were in 2017, 2014, 2011 and 2007. The gap to the previous survey arises because the date of the next would have been in the peak of the pandemic. However, the 2017 survey was November and this survey May, so the gap is not as long as the calendar years suggest (4.5 years not apparently 5).

Mid Sussex District Council has also adopted fully sections 165 and 167 of the Equality Act 2010 under the permissive option provided for in April 2017. A list of wheelchair accessible vehicles (WAV) is published, with those drivers now having to meet the full requirements of this Act. There are 30 hackney carriages on this list. This is current best practice and was agreed in full with the trade before implementation.

Industry structure

There are four (three in 2017) large public-facing companies in place. Only one of these covers the full licensing area. One has a booking office located at Hayward's Heath Station. Another large operator with a good size fleet focusses solely on school run and NHS contracts and does not undertake regular public-facing work with any of their fleet. There are three smaller operators with five to six vehicles each and 17 operators with around four vehicles each. The remaining private hire operators are either one- man bands or who have no more than two vehicles. There are three known small hackney carriage only telephone networks (one more than in 2017).

Quite a good number of operators focus solely on school contract work across the District. The three large operators who undertake circuit work are all mixed fleet, containing both hackney carriage and private hire vehicles. This can blur further any distinction there may be between the two kinds of vehicle as people may book a vehicle and be serviced by either a hackney carriage or private hire dependent on availability. It also implies that many hackney carriages will wait at ranks but leave empty to fulfil bookings, dependent on the operating protocols of the companies they work for.

This implies there are around six companies widely available to the public either at ranks, by hailing or by booking.

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3 Patent demand measurement (rank surveys)

As already recorded in Chapter 2, control of provision of on-street ranks in Mid Sussex District Council is under control of the higher tier of West Sussex County Council, although the County involve the District in most decisions regarding revision to provision.

Our methodology involves a current review both in advance of submitting our proposal to undertake this survey and at the study inception meeting. 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 available on request.

Since the last survey, there has been only one major change to rank provision, resulting from the demolition of the town centre buildings adjacent to the former Civic Way taxi rank. The rank was removed without direct replacement given its main source of demand was also taken away.

Overview of rank operation

Our observations at or near ranks found a total of some 8,255 vehicle arrivals and departures. Nearly half of these were at Haywards Heath Station, followed by 17% at Burgess Hill Station, 13% at South Road, 12% at the Boulevard, 5% at East Grinstead station and 4% at Church Road.

Of the total movements, two thirds were hackney carriages.

27% (9% in 2017) of these were cars, many of which interfered with operation of the ranks. The worst location for issue with cars potentially affecting rank operation was at The Broadway, Hayward's Heath. Around 82% (58% in 2017) of movements here were cars rather than hackney carriages. Church Road, Burgess Hill saw 58% of movements by cars whilst South Road saw 57%. This suggests there may be need for civil enforcement regarding parking at these council provided locations. There is a national issue growing given that many cars have got used to using taxi ranks during the pandemic when less hackney carriages were around and assume they can continue to do this now, which is not acceptable or safe.

The proportion of cars near the rail station ranks was less, with the lowest being just 1% at Haywards Heath. However, there were 19% at East Grinstead and 35% at Burgess Hill, both arising from the layout of the ranks particularly at Burgess Hill. Only the rail companies can take action in these locations.

Very few private hire vehicles were observed near to ranks, no more than 1.7% (but up from the 1% of 2017), and there were goods vehicles active at or near ranks now accounted for 5% overall with the most – 23% occurring at South Road.

Rank usage overview

The rank observations were factored to estimate a typical week of demand in terms of passengers. The table below provides the results:

Rank	Passengers per week 2022 survey	Passengers per week, 2017 survey	Passengers per week, 2014 survey	Passengers per week, 2011 survey
Hayward's Heath Station	4,679 (75%)	4,692 (56%)	4,527 (54%)	2,148 (60%)
Burgess Hill Station	763 (12%)	1,955 (23%)	2,113 (25%)	442 (12%)
East Grinstead Station	376 (6%)	933 (11%)	1,167 (14%)	450 (12%)
The Broadway, Hayward's Heath	180 (3%)	164 (2%)	Not observed	Not observed
Church Rd, Burgess Hill	111 (2%)	213 (3%)	78 (1%)	Not observed
South Road, Hayward's Heath	92 (1%)	193 (2%)	211 (3%)	185 (5%)
London Rd, East Grinstead (informal location)	0	93 (1%)	0 (0%)	174 (5%)
Civic Way, Burgess Hill	Gone	174 (2%)	228 (3%)	204 (6%)
Keymer Rd, Hassocks	0	5 (0.0%)	6 (0.0%)	Not observed
(total non-private demand)	383 (6%)	842 (10%)	523 (6%)	570 (16%)
Hassocks Station	No longer available	No longer available	No longer available	7 (0.0%)
TOTAL	***6,201***	***8,422***	***8,330***	***3,610***
Change from previous survey	***-26%***	***+1%***	***+130%***	
Change from first survey	***+70%***	***+133%***	***+130%***	

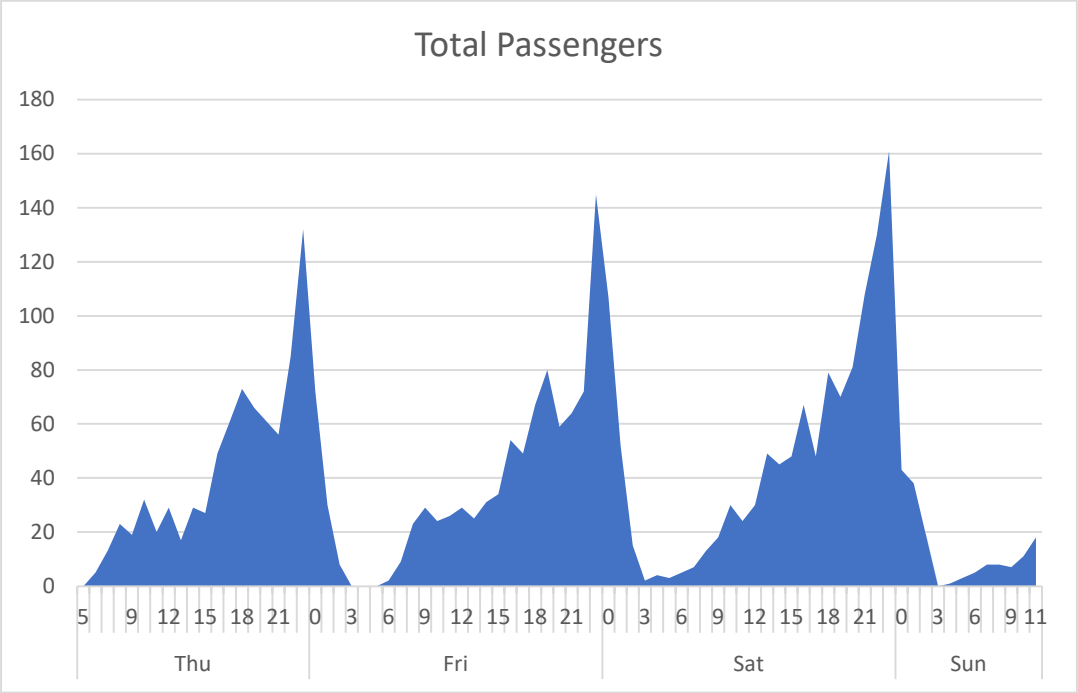
For the current survey, as in all previous surveys, the bulk of passenger demand occurs at Hayward's Heath station. The proportion and actual volume has increased since both the 2014 and 2017 surveys. This rank provides some 75% (was 56%) of all estimated passenger demand in the area at ranks. Burgess Hill is second with 12% (heavily reduced from 23% last time), with East Grinstead third with 6% (again heavily reduced from 11% last time).

The busiest non-station rank is now at The Broadway, with 3% of estimated passengers. This has now overtaken Church Road in Burgess Hill, with 2% of estimated passengers, followed by South Road now 2% of total passenger demand.

The Hassocks rank saw no activity this time, nor was there any activity around the London Road roundabout, although there were some roadworks here. Just one licensed vehicle used the formal London Road rank to wait a short time but did not pick up any passengers.

In this survey, the proportion of passengers from the non-station ranks is some 6%, as it was in 2014, although that proportion had increased to 10% in the last survey.

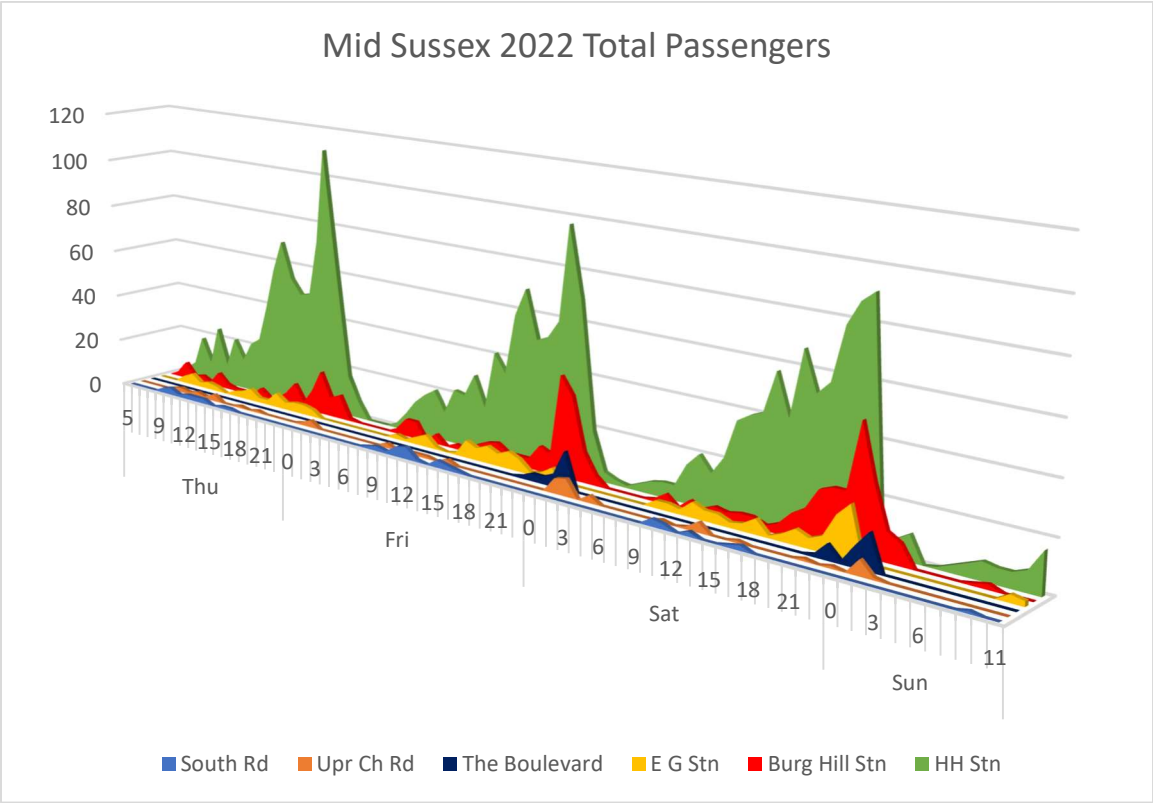
The graph below demonstrates the overall picture of rank usage over the observation period.



The graph first shows that the area has fairly similar demand profiles and levels for all three days of our observations. The early hours of Friday see three hours (03:00, 04:00 and 05:00) with zero flows but only one such hour on the Sunday morning (and none Saturday morning). The three peaks are all in the 23:00 hour on each night and are only marginally greater moving from Thursday (132) to Friday (145) to Saturday (161). This demonstrates a non-peaky demand profile overall.

Average flows on Thursday are 38 passengers, 42 on Friday and 47 Saturday, not particularly different. Overall average flows are 39 passengers per hour, not particularly high.

The following graph compares each site over the observation period:



The results are clearly dominated by the stations, with most at Hayward's Heath, then Burgess Hill and finally East Grinstead. Whilst Burgess Hill has one peak on all three days, Hayward's Heath has two or three peaks, all from afternoon onwards. All the other ranks make small but clear contribution to the overall pattern of flows. These patterns are very similar to 2017 which is remarkable given the changes through the pandemic.

The council provided ranks give lower demand, with South Road daytime and The Boulevard night only (and not on Thursdays). Upper Church Road is used both day and night but with its peaks on the Friday and Saturday nights.

Disability usage of ranks

During the course of our observations, there was usage of the Haywards Heath Station rank by three people in wheelchairs. This is lower than the only usage of ranks by people in wheelchairs in 2017 at the Church Road rank in Burgess Hill, where there was a total of eight passengers observed arriving or departing from the rank in wheelchairs. Those observed to have another disability needing assistance but not a wheelchair accessible vehicle totalled 31 examples, most of which were at Haywards Heath Station with a smaller number (six) at Upper Church Road and four at Burgess Hill Station.

In terms of wheelchair accessible vehicles, 26% of vehicle movements observed as hackney carriage appeared to be wheelchair accessible style (similar to the 27% of 2017). This is higher than the percentage in the fleet (19%) which suggests that many of these vehicles focus on rank work, more so than the saloon style vehicles. East Grinstead station rank saw about 70% (35% in 2017) of its movements WAV style whilst Hayward's Heath station saw 25% (30%, 2017). South Road saw the second highest level with 37%. This is encouraging.

Plate activity levels

A test was undertaken on the Friday of the rank observations to identify at key locations how many plates were active. This allows an estimate of the number of plates needed to meet demand at the measured level, and also allows any potential for 'playing-up' to the survey to be considered, i.e., were there a high proportion of vehicles active when the survey was being undertaken.

During the course of the eight hours observed, 151 different valid local hackney carriage plates were observed. 44 private hire (20% of the total observations), 18 out of town and seven vehicles with unobserved details were noted.

Of the current number of hackney carriage plates on issue, 43% of the total were seen at least once on that day (slightly higher than the 42% of 2017). However, comparing periods through the day, in general 2022 saw lower levels of vehicles active in all specific periods apart from those at Haywards Heath Station.

The afternoon observation period at that location saw just marginally less vehicles from the fleet than in 2017 (18% now compared to 19% then). However, the later observations saw a much higher proportion of the fleet active in that period than in 2017 (19% now and 6% then). This suggests more of the fleet focussing on the peak period there.

However, compared to 2017, the most frequent hackney carriage was seen six times, whereas in 2017, one vehicle was observed nine times, three eight times, one seven times, five six times (one now), eight five times (four now) and eight four times (five now). This suggests lower activity rates now.

It also suggests more vehicles focussing on the honey pot location of Haywards' Heath station. Only four of the 66 different vehicles observed were seen at this location and another rank in the area. Most seemed to focus on one specific rank.

There is no evidence from this survey that there was any specific 'playing up' by the trade to the observations being undertaken.

4 General public views

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

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

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

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

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 study, a total of 337 (300 in 2017) persons were interviewed providing a similar sample size to that undertaken in the previous study. The sample covered 112 (100) from Hayward's Heath, 110 (100) from East Grinstead, just 7 (50) from Hassocks and 59 (50) from Burgess Hill. A further 49 of the public interviews were complete on-line following marketing by the authority itself.

Comparison was made to the estimates of gender and age splits from the initial information from the 2021 census. For the bulk of those interviewed for whom information was observed, there was an exact correlation with gender, with 48% of respondents and the census being male. For age groups, the under 30's were under-represented in our sample (12% compared to 18% in census), whilst the mid-group was more over-represented (46% compared to 41%) and the older group less so (43% compared to 41%).

For the full sample, 17% said they had made one or more trips by licensed vehicle in the area by hackney carriage in the past three months. 26% had done so by private hire only and 21% by both types of vehicle. This is 64% in total for licensed vehicles and 38% for hackney carriage or use of both vehicles. This is higher than the 46% for all vehicle types in the previous survey and marginally higher than the 2011 value of 61%.

Total licensed vehicle usage was highest in Hayward's Heath and lowest in Hassocks, with the range between 43% and 67% (was 38% and 56% in 2017) in the areas (again higher than previous). The internet responses showed higher usage of 87% but this may be due to mainly those using licensed vehicles being interested to complete this survey.

Most told us how often they used licensed vehicles. Using these responses, we estimated overall trips per month per person. On average, across the full set of people interviewed, people made 2.1 trips per month, higher than the 1 trip per month estimated in the previous survey.

This value varied from 0.4 in Hassocks to 2.1 in Hayward's Heath. Overall, the information suggests people use licensed vehicles most in Hayward's Heath, then East Grinstead, Burgess Hill and finally Hassocks (order in 2017 was East Grinstead, then Hayward's Heath, then Hassocks with the least usage in Burgess Hill). This estimate is later compared to the value for purely hackney carriages.

Over all interviewees that responded, 52% (53% last survey) said they got licensed vehicles by phoning a company. 35% (37%) said they got them at ranks and 1% (2%) hailed. None (4%) used a freephone and 7% (4%) an app. This shows very similar levels albeit a marginal move towards apps but strongest against use of freephones.

29 (24 in previous) different companies were quoted as used. However, only 13 (11) of these gained more than one citation, and only four (six in previous) were mentioned by 11 or more people. The top company obtained 37% (24% last time) of votes followed by 21%, 13% and 5% (17%, 15%, 12%, 9% and 6% in the last survey). Comparing actual companies involved, the previous top company dropped from 24% last time to 5% now, with the fourth company last time also dropping, from 12% to 2%. Both second and third sized companies last time are now first and second, both increasing in share (from 17% to 37% and 15% to 21% respectively. The sixth placed company in the previous survey rose from 6% then to 13% now (now third). All of this suggests both high competition and agglomeration since last time.

This time, no companies were mentioned in Hassocks at all.

Interviewees were then asked about their specific usage of hackney carriages in the area. Of those responding, 29% (34% last time) said they could not remember when they had last used a hackney carriage in the area, and 19% now said they could not remember seeing one in the area, a large increase since the zero of previous surveys.

The resulting values were compared to those for use of all licensed vehicles and to the proportion saying they got licensed vehicles from ranks. Usage of hackney carriages estimated was 80% (69% last time) the level of total usage, quite high, and higher than the average 35% saying they got them from ranks.

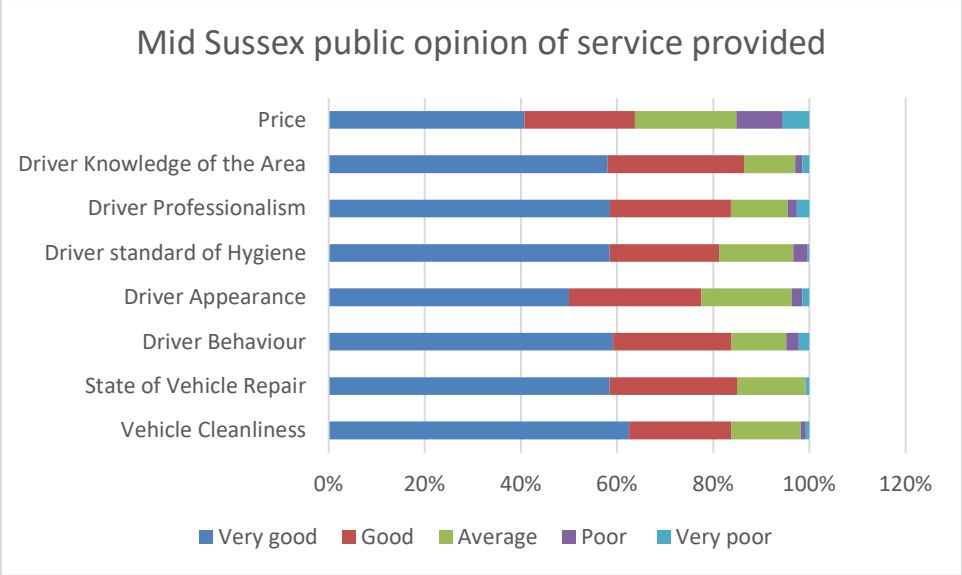
We were also told the ranks people were aware of. Two thirds told us between one and three ranks they were aware of. Of these people, 10% named three ranks, 30% two and the remainder just one rank. 58% of those naming a rank said they did use the rank they had named (but lower than the 76% of the previous survey). In total, there were 348 mentions of ranks by all persons interviewed.

Across all these interviews, 40% were aware of Hayward's Heath station rank followed by 22% East Grinstead (assumed to be the station) and 18% Burgess Hill Station. 2% quoted Hassocks Station although there is no formal provision there. 6% said High Street Hayward's Heath and 5% South Road Hayward's Heath (assumed to be the same location). No other location saw more than 1% of the total mentions.

Most people tended to know the station rank in the area they were interviewed in, with the Hassocks station rank being the only rank quoted as known by those interviewed in that area. Burgess Hill saw 85% of rank mentions being the station there, plus 9% for Hayward's Heath station and one mention for 'W H Smiths' and one for 'Church Walk' (both could be Church Road).

The Hayward's Heath sample saw 63% mention that station, 15% High Street and 7% South Road. No mention was made of the night rank.

People were asked to rate the service provided in the area for a range of elements. Some 81% provided their ratings. The graph below shows the results.



This shows the dominant view of those providing their comment is that the service provided in all areas is dominated by 'very good' scores. However, all but one category has some very poor and some poor scores, but only of a minor nature. Vehicle cleanliness is top scoring but with all other elements apart from driver appearance similarly high scoring. Apart from price, the minimum very good share is 50% (driver appearance) with vehicle cleanliness 63%. The fleet is well-appreciated.

The worst performing element with just 41% very good (which is still high) is, as usual, price. This scored the highest very poor (6%), poor (10%) and average (21%) shares of the total. This still leaves 64% of people thinking price was good or very good.

Unusually, 26 people provided further detail why they had given a poor or very poor score, although many clearly related to booked vehicles and increasing fares (which again mainly relates to bookings). Two said rank drivers would only take cash.

In terms of changes that might increase peoples' usage of hackney carriages, many gave multiple responses. In total there were some 354 responses, with 41% of these being 'if they were more affordable'. 15% was if drivers were better quality, 14% for more hackney carriages available on street or at rank, 13% for vehicle quality, 9% for more hackney carriages that could be phoned for and 3% for having a screen between the driver and passenger.

There were various alternative 'other' items given, but none were particularly significant. The top score was five people saying use of an app would increase their usage. Other mentions included more availability, better punctuality, driver knowledge, cost and ability to pay by card.

In terms of needing adapted vehicles, 88% (very similar to the 89% of last time) said they did not need, nor know anyone who needed one. Of those needing an adapted vehicle, the bulk said they knew someone who needed a WAV, rather than any other kind of adaptation. This response has not changed over the last two surveys.

People were asked if they had given up waiting or made other arrangements when trying to get a hackney carriage at a rank anywhere in Mid Sussex. 21% of those giving an answer said they had. This was 17.5% of all respondents assuming no response meant people had not given up or did not use local licensed vehicles.

However, only a small proportion went on to say where, with three of these clearly being either making bookings or out of the area. Seven quoted the three stations whilst nine others quoted just the area name. In terms of when, 46% of those quoting a time said at night; one said 2019 and another last Christmas. This suggests the true latent demand value is less than 17.5% with about half of the true value related to station ranks (which have supplementary requirements out of council control).

People also told us what they did to get where they wanted to go. Of the 57 responses provided, 33% said they made a booking, 35% walked and then hailed, with 16% calling friends or relatives for a lift, 7% walking, 4% using a train to get home with a walk, with the other 5% use of another taxi, bus, or stating they did not think there were any hackney carriages available.

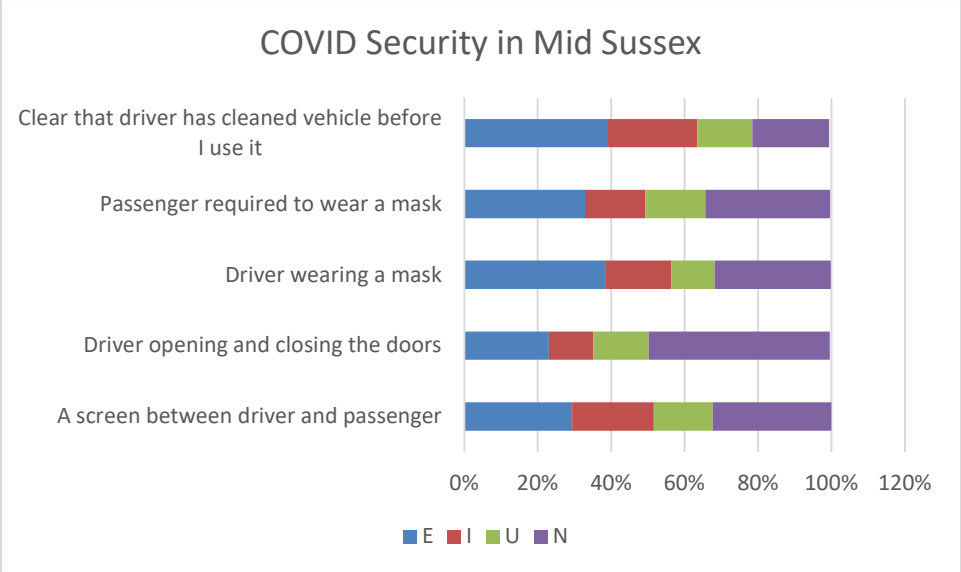
With reference to if people thought there were enough hackney carriages in the Mid Sussex area, the split was 50/50 for the two thirds that responded.

Interviewees were asked how they thought their usage of licensed vehicles had changed compared to pre-COVID. 48% said they use both kinds of vehicle about the same. 7% said they used hackney carriages more, but 14% said less, a net loss of 7%; whilst for private hire the values were 17% more and 12% less, a net gain of 5%.

Looking forward, 63% felt their future usage of both types of vehicle would be the same, 13% felt they would use hackney carriages more (but 2% said less, i.e. a net gain of 11%) with private hire values 17% more and 3% less, a net gain of 14%.

Overall these figures suggest more usage of private hire than hackney carriage with the biggest COVID loss relating to reduced use of hackney carriages at the present time.

When asked regarding the COVID security measures people thought might be essential, important, unimportant or not important the following results were obtained (about 91% of interviewees provided a response):



The overall view suggests drivers wearing masks remained the most essential item at the time of the interviews. This was followed by the vehicle having been cleaned, passenger masks, screen and finally doors being open and closed by the driver. The level of not important ranged from 21% to 49%.

94% of interviewees told us if they lived in the area or not. For the full sample, 95% were from the area, with 38% from Hayward's Heath, 32% East Grinstead, 20% Burgess Hill, 3% Hassocks and 1% from elsewhere in Mid Sussex. Most of those not from the area were from local although there was at least one foreign interviewee.

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 can be 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. Details of those contacted are provided in outline format in Appendix 6.

Supermarkets
No response was made.

Hotels
No response was made.

Public houses
No response was made

Late night premises
No response was made.

Other entertainment venues
There was no response.

Restaurants
There was no response.

Hospitals
No response was received from local hospitals.

Police
No response was received.

Disability
One disability group based in Hassocks responded. They told us local taxis were helpful and available when they needed them. They used a local company based next to the railway station at Hassocks. Usage is between 10:00 and 12:00 and 13:30 to 14:00 mainly to supplement usage of their own private minibus. They usually made bookings and could get vehicles when needed in that situation, but there were sometimes issues with getting vehicle immediately although this did not occur that often.

Rail and other transport operators
No comment was provided by other transport operators.

Other Council contacts
No other comment was provided from those contacted.

This is disappointing but given this consultation is not statutory, and the current tendency is for people not to respond unless they are directly answering a question that might lead to custom, there is little more that can be done. The only pointer is that, were there key issues, people would take opportunity to respond. The licensing section has not received any feedback either.

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 behavior.

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. The Council issued all letters to the local trade, with a total of 482 (461 in the previous survey) letters being issued. There were 180 to hackney drivers, 56 to operators and 246 to private hire drivers.

By the time the consultation closed, there were some 56 responses, some 12% (not allowing for any duplication) (and exactly half that of the 102 responses from 2017 which was a very high level of 22%).

On receipt of the responses, a check was undertaken to ensure there were no obvious duplicates or any other out of course entries. One empty response was identified and removed (this was done before the above response rate was calculated).

80% of the respondents said the licensed vehicle trade was their only or main source of income. 11% said they were not currently working but planned to return when demand increased again. 5% were working part time and had other additional sources of income. 4% were working part time but had no other sources of income. None of those replying said they were not working and had no intention of working in the licensed vehicle trade in the future.

54% of respondents said they drove hackney carriages and 46% said private hire. Again, nationally our driver surveys are now seeing more response from private hire than has been the case.

The average length of service identified was 13 years – the same as in 2017. The longest quoted was some 35 years (was 41 in 2017 which suggests some more experienced drivers may have retired, a national current fact). When considering the spread of service, the largest proportion, a fifth of respondents, said they had worked between six and ten years. 16% each had worked either 11-15 or 16-20 years with 14% between 21 and 25 years. 9% said they had worked two years (suggesting they began either during or just before the pandemic). 2% said one year.

The highest percentage, 36%, said they worked six days (again same as 2017). 23% (27% 2017) said five days, 23% (18% 2017) seven days, 5% (9%) saying three days, 4% (7%) four days and 4% (2%) just two days. The actual average number of days worked was five (again as in 2017).

The average hours worked were 42 (41 in 2017), slightly above the normal level, with a maximum of 86 (80) hours quoted. The spread of hours saw 27% of respondents working 31-40 hours and 19% 41-50. 13% worked 51-60 and 12% 21-30, with all other groups of hours seeing either 6% or 4%.

Overall taking days and hours into account those working seem to be working marginally more days and hours than in 2017, but not appreciably different overall.

89% (73% in 2017) owned their own vehicle, with just 7% (17% in 2017) saying that someone else also drove the vehicle they used. This suggests a strong reduction in sharing of vehicles, another current common change around the country, with people focussing on making ends meet by tending to use their own vehicle more and with less who only drive tending to continue in the trade. On this basis, 9% said they had moved towards single owner driving since pre-COVID times.

Respondents were asked the kind of work they normally undertook. All provided at least one response (38%) with one each providing five or four responses, 9% (5) providing three responses and the remaining 20% (11) giving two responses. Of the total responses provided, 29% were immediate hire, ranks; 27% immediate hire bookings; 23% advanced hire, 12% chauffer or corporate and 10% school contracts.

Half of the hackney carriages responding said they only obtained work from immediate hire from ranks. 23% of responding hackney carriages did not say they obtained any work from ranks. 7% just got work from immediate hire bookings, 4% just corporate, 4% just advanced hire and school contract, 4% immediate hire bookings and chauffer/corporate and 4% immediate hire bookings, advanced hire and school contracts.

A further 27% obtained work from immediate hire at the ranks supplemented by other methods. 7% were immediate hire from ranks and from bookings; 4% from immediate hire ranks and advanced hire and 4% from immediate hire and school contracts. 7% obtained work from immediate hire rank, immediate hire bookings and advanced hire work. 4% added school contracts to this mix, with a further 4% adding chauffer or corporate.

For private hire, 23% just obtained work from immediate hire, bookings. 15% said they got work from immediate hire bookings and advanced hire, 4% immediate hire bookings, advanced hire and chauffer or corporate and 4% immediate hire, bookings, advanced hire and school contracts. This left 54% of the private hire respondents not undertaking immediate hire bookings. 23% were chauffer or corporate only. 8% were school contract only. 23% were advanced hire only.

There was one private hire saying they obtained work from immediate hire, ranks but on inspection this appeared to be a driver who had their own private hire vehicle but in the past had rented a hackney carriage plate which they had stopped during the pandemic. They preferred to be able to buy their own plate but could not at the present time and therefore opposed the limit.

82% said they accepted pre-bookings. 27% said by phone and 23% by office. Various other different methods, principally including phone and email were also given.

44% were willing to meet to discuss issues around the demand survey. This was not taken up due to the relatively slow response rate and time it took to get the preferred level of responses. Six emails were provided by those willing to provide more information.

Respondents were asked about what determined when they worked. However, the results were not conclusive, with 20% of responses being ‘preference’ and 18% ‘busy times’ whilst 14% said there were no specific reasons. Family commitments guided 8% of work patterns.

Rank service was stated by 43% of those responding. There were three private hires suggesting they used ranks (one for East Grinstead Station and two for Haywards Heath) (the two for Haywards Heath confirmed 50-60% of their work was from ranks) although one was the already mentioned driver above who had formerly rented a hackney carriage.

For the total responses, 54% said Haywards Heath station, 17% Burgess Hill Station, 14% South Road Haywards Heath, 6% East Grinstead Station, 6% for Church Road Burgess Hill and one response (3%) for Hassocks Station (a hackney carriage that undertook immediate hire from ranks or bookings but mentioned no other rank). None mentioned the Haywards Heath night rank at all.

One respondent said they serviced Haywards Heath and Burgess Hill stations plus South Road, Haywards Heath. This was the only response with three ranks. However, they suggested only 10% of their work came from this source with 35% from school contracts. They also said they were planning to leave the industry.

Four respondents said they serviced both Haywards Heath Station and South Road. One said Haywards Heath and Burgess Hill Stations and another Burgess Hill Station and Church Road Burgess Hill.

81%, including many of the private hire, felt there were enough hackney carriages in Mid Sussex at the present time. 65% felt there were enough wheel chair accessible vehicles.

The question was asked how the current limit on hackney carriage vehicle numbers benefitted the public. 86% provided a response to this question. Two hackney and five private hire (10% of these) said they were not sure or the question was not relevant to them. 38% - ten hackney carriages and four private hire either agreed it did or provided valid reasons including reducing pollution, improving quality, reducing congestion, and making it easier to identify drivers. Indirect benefit was achieved by ensuring drivers had better remuneration.

A further 10% of those responding made no comment re public benefit but made it clear they felt there were already too many hackney carriages.

One hackney and one private hire said it only benefitted drivers, one of whom said they were not concerned about providing public benefit, just earning a living. One private hire suggested that more plates would only be taken up by those renting at present, meaning no net gain in drivers.

13% clearly said the limit did not benefit the public. Four of these were hackney carriage and two private hire.

One hackney carriage said the limit did not make any difference on sufficiency of vehicle numbers.

Overall, support remains strong for the limit and a good number believe it to have public benefit, whilst others just consider it a good idea per se.

When asked how rank trip numbers had changed since three years ago, 71% said about the same, 25% less and 4% more. For bookings (with more respondents) 60% said about the same, 26% less and 14% more. As is typical around the country, this suggests there has been varying levels of change but generally a little more for bookings.

With respect to the impact of the pandemic, all provided a response. One hackney carriage and two private hire respondents said there had been no difference.

Four hackney carriage and four private hire respondents provided levels of reduction, with three saying initial 80% reductions but two saying levels now remain 20-30% down. Three more said halved, another 40% and another 30%.

Eight (five private hire and three hackney carriages) said they had not worked for periods between six months and two years at all. Two private hire said work dried up with little usage of airports or hotels but that they had gained school contracts. Another (already noted above) appeared to have swopped from renting a hackney carriage to driving their own private hire.

28 made comments about the lack of work or strong negative impacts from the pandemic but little more.

Five pointed out severe impacts but most said things were improving now, with two considering work was now back to the levels pre-lockdown.

Responses were then provided explaining how people felt things might change going forward. Again, there was a wide range. Less responded, however. Four private hire and two hackney carriage drivers all said they were not sure about the future. Four suggested they were likely to leave the industry in the short to medium term (one retiring) (two hackney and two private hire).

Eight felt demand would never recover (five private hire, three hackney). Others felt it would recover but to lower levels. Five others explained the future lower levels were resulting from people working more from home. One was more positive saying new demand for leisure / social and school work had replaced lost demand from corporate travel. One felt new housing would increase demand. One suggested more hackney carriage drivers were needed now to meet developing demand.

Detailed questions were asked regarding vehicle replacement. 65% of those responding said they would be planning a change within the next five years. Of these, 31% expected to replace with a hybrid, 22% electric, 19% diesel and 9% petrol.

People were asked what challenges or barriers there were to moving to electric vehicles. Most responded, with 63% giving one barrier and the remainder two. Of all the responses, 44% related to the initial cost, 31% to the shortage of charge points, 17% to range anxiety, 6% to overall costs, 1% to a lack of garages able to service them and the final 1% saying they were not sure what barriers there were.

Respondents were invited to suggest any support or incentives that might be provided to help more electric vehicles to be taken up by the trade. Several used this space to continue their disagreement with such options. 64% provided an answer, many several options. The most popular of the options, with 28% of total responses was charger provision. 20% said it needed government financial support. 13% subsidy, with other lesser suggestions being 7% each for interest free loans or cheaper licences or a grant or leasing deals with the local authority; 4% suggesting it was better to focus at the moment on ensuring people could survive providing taxi services, and 2% (one person each) for paying the cost of the vehicle, ensuring all vehicles could do over 300 miles on a charge, allowing putting older vehicles in service and providing a hackney carriage plate (above the limit) for anyone providing an electric or hybrid vehicle.

Finally, option was provided for any other comments to be given. One person was grateful for the good service provided by the licensing section. Others wanted restrictions reduced whilst two said more plates were needed and another felt the limit was unfair to private hire drivers who could not compete. One felt any reference to anything other than ranks, e.g. asking about school contracts was totally irrelevant and inappropriate to an unmet demand study.

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.

Element	2022	2017	2014
Average passenger delay (mins)	0.13	0.083	0.12
Off peak level of delay	10	0	4.7
General incidence of delay	2.4	0.597	12.5
Peakiness of Demand	1	1	1
Seasonal Factor	1	1	1
Latent demand	1.175	1.047	1.03
Overall index of unmet demand	3.76	Zero	7.3

For Mid Sussex in 2022 the demand profile is NOT peaky. This means that all other values in the equation are effectively at the measured level, rather than reduced to half values if the profile was peaky.

For the 2022 information, off peak passenger queues were observed in 10% of hours, compared to the none in 2017 (that set the overall index to zero).

Considering the parts of the index, the level of average passenger delay has increased to 0.13 seconds, the proportion of passengers travelling in hours with over a minute of delay has increase to 2.4; and the latent demand factor (for the full data set) has also increased to 1.175.

The overall value of ISUD (including all ranks) was 7.3 in 2014, dropped to zero in 2017 and has now returned, but only to 3.76, still less than in 2014. This level is far from being significant in terms of the industry standard evaluation that takes the value of 80 as a cut-off determining unmet demand as being significant.

8 Disability user survey

For this survey an additional on-line questionnaire was provided for the Council to circulate to all those it is aware may need adapted licensed vehicles of any form. It is accepted that this is not perhaps the most inclusive or preferable way to undertake a full review of accessibility of the licensed vehicle fleet but it is a relatively direct and cost-effective test allowing some response to be provided. We have found the responses useful and illustrating in recent surveys.

There were seven responses received with the site open from mid-May 2022 to mid-October 2022. The latest response was received in late July 2022.

In terms of conditions for those responding, two had mobility and long-standing health conditions (not specified) (29%), one each had mobility and mental health, vision, mobility or hearing issues. The final respondent was a carer for a relative in a residential home. With reference to the total overall condition responses, 40% were mobility, 20% long standing health issues and 10% each for mental health, vision, hearing and being a carer. Despite the small sample this gives a fair spread of response across the conditions we suggested.

People were asked to identify the range of needs they had. The seven persons provided a total of 27 responses to this question. One person chose seven of the 18 choices offered. Another chose six. Two chose four and the remaining three chose two. There were four statements that each received 11% of responses (three each), three receiving 7% (two) and the remaining eleven that were chosen obtained a single mention each (4%).

The four most popular needs were:

- A wheelchair all of the time
- Need for a purpose built WAV
- Requiring a text message to let them know their vehicle had arrived (private hire)
- Requiring the vehicle to arrive exactly and not be late (for private hire vehicles)

The needs mentioned twice were:

- Requiring the driver to knock on their door or phone them once it had arrived outside their address (private hire)
- For there to be a chaperone / carer with them all of the time they travel
- Having walking sticks or crutches

The other needs mentioned once were:

- An assistance dog
- A wheelchair some or most of the time
- Hearing aids
- Sight aids
- Requiring assistance to transfer with wheelchair safely in the boot
- Requiring an operator to provide them with a vehicle and driver capable of carrying both the passenger and their assistance dog
- Requiring operator to advise someone else when the passenger had been collected and when they had been dropped off
- Requiring driver to speak clearly facing them

For this survey, none responded that they found it hard or impossible to step into a WAV, nor that they were a wheelchair user who would not need a purpose built WAV.

Of the seven respondents, 72% said they rarely used hackney carriages, 14% were occasional users (one person) and the other person was a regular user. For private hire, 57% rarely used them, 28% were occasional and 14% regular users (this person said they were an occasional hackney carriage user). This suggests slightly higher usage of private hire but not by much.

Six people responded to various statements how hackney carriages met their needs. 50% said taxi drivers did enough to enable them to travel, a third said taxi drivers usually went above and beyond to help them travel and 17% - one person- said they did not feel that taxi drivers seemed to understand their disability or travel needs. For private hire, two thirds said private hire drivers did enough to enable them to travel, again 17% did not understand their travel needs with the final 17% saying private hire drivers went above and beyond to assist. It was the same two people who said neither kind of driver understood their travel needs, and one of those saying drivers went above and beyond.

With respect to hackney carriages, 57% felt there were too few wheelchair accessible hackney carriages, 14% felt the number was about right with the remaining 29% saying they did not know. On the private hire side, responses were the same apart from one saying there were more than enough wheelchair accessible private hires (this person had said the level was about right for hackney carriages). Again, this suggests marginally better results on the private hire side.

People were asked what statements applied if they could not find a hackney carriage when they needed one. 14% (one respondent) chose six of the seven responses, 43% chose five and 43% chose three – suggesting all make various choices in this situation. This provided a total of 15 votes for the seven choices provided. One third of responses were that people would phone a private hire operator instead. A fifth of responses said they would call a friend or family member, with a further fifth saying they would use a less suitable vehicle which would require more assistance from the driver, and all other responses were just voted for once; including not going out / relying on the home they lived in provision, ending up stranded, getting there by their own steam (walking or using a wheel chair), or waiting until an appropriate vehicle arrives.

For private hire, similar options provided three responses for one person, two for two and one for the other four persons. This gave a total of 11 responses, from which the most frequent two (each with 27%) were they did not attend their appointment and that they used a less suitable vehicle. 18% each (two people) said they would call a friend or family member. 9% each said get to their destination by walking or using a wheelchair, depend on transport for the home they lived in, or that they had no alternative because their electric wheelchair needed a specialist vehicle.

People were asked if they felt operators currently met their travel needs. All responded, with all but one giving one of the choices with the other giving three of the choices offered. This provided a total of nine different responses. The two most popular responses, each with 22% of the response, were that they found operators never, or rarely provided a private hire vehicle suitable and that operators usually told them there was no suitable vehicle available. One person said the service they received from private hire operators was good, another that when told about needs operators were usually good, another that they did not dare explain their needs for rear of discrimination, with another confirming they usually waited a couple of hours, or that they were always anxious until the vehicle arrived.

Eight other statements were provided. One person said that seven applied to them, one said two and two said just one applied. Of the total 11 responses, three saw two people each respond (18% of the total). These were that the person had been refused transport for reasons related to their disability, that they had been made to feel uncomfortable by a taxi driver due to their disability and that a driver had refused to take them because they were in a wheelchair. All other responses were just for one person including:

- I booked through an operator but when the vehicle arrived the driver did not take me
- A taxi driver refused to take me as I had an assistance dog
- I was charged extra because of my disability

- I generally cannot afford taxi fares
- A person who was left stranded because the driver said their dog and wheelchair would make the taxi seat / floors wet

People were also asked directly what changes they thought might improve the situation in the Mid Sussex licensing area for those with disabilities or other additional needs. Eight statements and another category were offered. One person chose all eight, 38% chose six, 26% chose four, 6% chose two and 3% chose one.

All agreed that a wider variety of wheelchair accessible vehicles was needed, specifically those not so high off the ground. This provided 23% of the total response. This was followed by 16% saying disability awareness training for drivers. 13% each said either disability training for operators, any driver found to discriminate to have their licences revoked or more enforcement by the council. 10% said more wheelchair accessible vehicles per se. 6% said better use of smartphone apps. 3% suggested travel coupons and 3% said introduce more London-style vehicles which they considered could take any wheelchair.

In overall terms, 43% felt service was satisfactory, 14% excellent, but 29% bad and 14% dreadful.

One person said London black cabs were an excellent example serving their needs with an electric wheelchair and an assistance dog. Another said the main need was consistency as they had been treated well by some drivers but could never be sure this would be the case.

Two respondents were family members filling in the form for them.

Although this response is only a small number, and there was only one of these who was both a regular hackney carriage and private hire user, there were several statements generally agreed with. The strongest was that there was a need for accessible vehicles that did not have as high steps as many currently provided. Other statements suggested training and other matters that might increase confidence of obtaining the help they needed were important.

9 Summary and synthesis

This Unmet demand survey 2022 on behalf of Mid Sussex District Council has been undertaken following the guidance of the Department for Transport Best Practice Guidance (BPG) and other recent case history regarding unmet demand and its significance. It has been undertaken using the current status of law and practise as at the end of October 2022.

Background and context

This survey is the latest in a regular set of reviews of the status of unmet demand within the District which forms part of the two-tier authority of West Sussex County. It was undertaken between March and October 2022, with video rank observations in mid-May, an all-trade driver survey between April and June, on-street pedestrian interviews in May and key stakeholder consultation throughout the period.

Hackney carriage vehicle numbers have been fixed at 154 since 2004. Present private hire vehicle numbers are about a third above the level of 1997 whilst hackney carriage numbers have increased 18% since the same date. The impact of the pandemic has principally removed private hire vehicles from the fleet and at the March 2021 DfT survey both fleets had about the same number of vehicles for the first time since 1999.

Driver licences remain either for hackney carriage or private hire with both groups following a similar recent pattern of pandemic-induced decline although there is recent evidence hackney carriage driver numbers have picked up marginally better than those in the private hire trade.

Most wheelchair accessible vehicles are still within the hackney carriage side of the licensed vehicle trade. The current level of 19% is marginally less than the typical level held since 2001. This compares favourably to the national average for mixed vehicle fleets of 22%. Private hire has a few wheelchair accessible vehicles. Mid Sussex is one of the earliest adopters of Sections 165 and 167 of the Equality Act.

The local licensed vehicle industry is fairly integrated between the hackney carriage and private hire elements compared to many other authorities. While there are three relatively visible hackney carriage only telephone networks, there are four large public-facing companies who operate mixed fleets (hackney carriage and private hire), although there is another large operator who is not publicly facing at all, operating solely on a range of contracts. This style of operation is typified by vehicles waiting at ranks but many departing empty to fulfil bookings.

Rank observations

Since the last survey, the only change to rank provision has been the loss of the Civic Way rank due to redevelopment work both demolishing its former main source of patronage but also blocking it off physically from any other pedestrian access.

A national trend, also noted in Mid Sussex, is an increased level of private cars interfering with rank usage. This has risen to 27% now (was 9%) and the worst abuse by private cars at The Broadway, now sees 82% (was 58% in 2017) of observed vehicles during our survey were private vehicles rather than hackney carriages.

Hayward's Heath station retains and has strengthened its dominant position in providing 75% (56% in 2017) of all estimated passenger usage at ranks in the area. The other two large stations of Burgess Hill and East Grinstead account for a further 12% and 6% respectively (but these are reduced from 23% and 11% in 2017). This means 93% of all rank demand in passenger terms is from private ranks needing supplementary permits – again increased from the 90% of 2017.

The next largest contribution of passengers at ranks is now at The Broadway (3%), followed by Church Road with 2% and South Road with 1%. The previously developing informal location in East Grinstead has now disappeared.

Overall demand is down by 26% since the 2017 survey. However, all three days observed (Thursday to Saturday) now see similar demand profiles and levels of demand. Average passengers per hour are 38 Thursday, 42 Friday and 47 Saturday; with peaks (all in the 23:00 hour) being 132, 145 and 161 respectively.

Wheelchair usage of hackney carriages was this time focussed on the Haywards Heath station rank, seeing three persons. This is less than the number at Church Road in 2017, where there were no similar movements this time.

Our observations at ranks found 26% of all vehicles appearing to be wheelchair accessible style, suggesting more of these vehicles focus their service on ranks in the area. Both stations have even higher proportions of WAV, very encouraging.

The plate activity review on the Friday found 43% of the fleet active during the sample covered, marginally higher than in 2017. Overall activity levels however appear marginally lower (vehicles were seen less frequently now).

Further, there seemed to be a stronger concentration of vehicles at Hayward's Heath station which did mirror growing demand there, but also left other locations apparently less well-served.

On street public views

337 on-street interviews were undertaken with people across the area, covering all four main centres. A further 49 interviews came from council 0n-line promotion of the survey. 64% (46% in 2017) overall said they had used a licensed vehicle in the area in the last three months, a further increase from 2014. 17% said hackney carriage and 21% said both private hire and hackney carriage.

Hayward's Heath had highest quoted usage and Hassocks the lowest. Quoted usage over the area was 2.1 licensed vehicle trips per person per month, more than twice the level quoted in 2017.

In terms of companies used to make bookings, there was a lot of change since 2017 suggesting agglomeration but also strong levels of competition between companies at the present time.

In terms of hackney carriages, they are visible but 29% (reduced from one in three in 2017) said they could not remember when they last used one. However, the level of people not remembering seeing a hackney carriage in the area had increased from zero to 19% of responses this time. This seems unusual. This was particularly true since the comparison of quoted usage suggested 80% of licensed vehicle use was hackney carriages (although this latter figure fits with the high level of mixed fleets in the area).

People mainly knew of the station ranks and not the smaller ranks. Only South Road was quoted from these, gaining 11% but shared almost equally between being called High Street and South Road.

Review of the quality of service was dominated by 'very good' scores apart from for price. This was confirmed by 41% saying they would use hackney carriages more were they more affordable.

The issue of need for adapted vehicles shows no difference and a remarkable level of stability over the last three surveys.

Latent demand was no more than 17.5%.

Between pre-COVID and now people suggested they used hackney carriages about 7% less but private hire 5% more; going forward 13% said they would use hackney carriages more and 14% would use private hire more.

The most important COVID security measure remained drivers wearing masks.

Key stakeholder views

As is consistent with the national position, there was only one key stakeholder response this time. This was from a disabled group in Hassocks generally complementing the service (but from a private hire company).

Trade views

The all-driver survey received a high level of 12% response (but lower than the 22% of 2017). 80% said the trade was their only or main source of income. 11% said they were not currently working but would do so when demand returned. 9% were working part time.

Similar working hours were found to those in 2017, and similar levels of experience but with some suggestion that some more experienced drivers had retired since the last survey. More owned their own vehicle now, and less shared. The split between respondents of normal work was 28% ranks, 27% bookings, 23% advanced bookings, 12% chauffer and 10% school contracts.

Whilst half of hackney carriages claimed they only obtained work from ranks, 23% suggested they obtained none of their work from ranks. No clear reason was given for when people chose to work. In terms of ranks quoted as used, Haywards Heath station saw 54% of quotes, 17% Burgess Hill Station, 14% South Road, 6% Church Road Burgess Hill and 6% for East Grinstead station.

Support for the limit on hackney carriage vehicle numbers remains strong although the level of understanding of why and how this benefitted the public was poor.

Formal evaluation of significance of unmet demand

As is generally the case around the country at this time, the levels of service reflected by the industry standard ISUD statistic have reduced. This means the overall index has moved closer to there being significant unmet demand than in 2017 (when the index was actually zero due to there being no off peak delays observed at all). However, the index remains about half of what it was in 2014, and very low overall (3.76 compared to the cut-off level of 80).

The main increase was with off peak levels of delay rising from zero to 10% this time. Average passenger delay was just 0.13 minutes (about the same as experienced in 2014).

Disability User Survey

Seven responses were received – not a high level – but providing some useful insight into the needs of those requiring an adapted licensed vehicle in the area. Only a small number were actual users of licensed vehicles. Respondents felt a wider range of wheelchair accessible vehicles were needed but there was also concern that step heights needed to be less. Overall 14% said service was excellent, 43% satisfactory but 29% said 'bad' and 14% 'dreadful'. Key conclusions were that training of drivers was important, with the strongest view that more lower step wheelchair accessible vehicles were needed.

Synthesis

Despite the pandemic, the licensed vehicle fleets and their drivers still appear to be providing an appreciated service across the area. The operation of mixed-fleet companies seems to provide benefit, as does retention of the limited number of hackney carriages. The overall low level of rank-based demand implies difficulty for the small number who do not have supplementary incomes either from contracts or from links to booking platforms.

In many respects there has been a remarkable stability in the industry over the last six years. The limit has helped with this.

However, there are concerns about the continued increased focus on the private station ranks and the focus within this on the main station rank. Whilst this does help keep the industry vibrant and viable, it does put the service at risk of the whim of the railway company policy regarding ranks and charging for permits.

10 Study Conclusions

On the basis of the evidence gathered in this Unmet demand survey 2022 for Mid Sussex District 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 Mid Sussex District Council licensing area.

This allows the committee legitimately to retain the limit on vehicle numbers, and to do so at the present level if it so wishes. Further, this decision could be defended if challenged.

Department for Transport Best Practice Guidance encourages a new survey within a three-year timeline.

The present limit on vehicle numbers continues to provide benefit to the public in terms of stability and very good service.

There remains need to keep opportunities to develop new ranks in the forefront of council development policy. The status of The Broadway rank proves people will use hackney carriages from new ranks. This needs to be particularly kept in mind for the redevelopment of Burgess Hill central area.