Lancaster City Council
Unmet demand survey

August 2020

Executive Summary

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

The present survey found that people continue to make reasonable usage of licensed vehicles in the Lancaster licensing area, with 2019 average weekly rank usage remarkably similar to that from 2016. The private station rank has seen most growth despite the continued negative impact of the additional restriction on numbers there out of the control of the Council. The very small North Street rank also seems to have increased in usage despite its small size. The hackney carriage fleet continue to respond very well to changes in demand and seem to have sufficient capacity to do so. The industry standard 'ISUD' index (index of significance of unmet demand) shows overall levels of service to passengers has improved marginally, and more so at the Council ranks.

Whilst apps have not seen as marked growth as in other locations, their existence plus the current strength of the overall operation appears to have kept national app incursion at bay. Overall, the picture of usage and service provided by the hackney carriage fleet was encouraging.

The key conclusion is that there was no unmet demand that was significant and that the limit policy is providing public benefit and trade stability that suggests it remains important to be retained.

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1 General introduction and background

Lancaster City Council is responsible for the licensing of hackney carriage and private hire vehicles operating within the Council area and is the licensing authority for this complete area. 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.

The Best Practice Guidance

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

Legal Background

Current hackney carriage, private hire and operator licensing is undertaken within the legal frameworks first set by the Town Polices Clause Act 1847 (TPCA), amended and supplemented by various following legislation including the Transport Act 1985, Section 16 in regard to hackney carriage vehicle limits, and by the Local Government Miscellaneous Provisions Act 1976 with reference to private hire vehicles and operations. This latter Act saw application of regulation to the then growing private hire sector which had not been previously part of the TPCA. Many of the aspects of these laws have been tested and refined by other more recent legislation and more importantly through case law.

Beyond legislation, the experience of the person in the street tends to see both hackney carriage and private hire vehicles both as 'taxis' – a term we will try for the sake of clarity to use only in its generic sense within the report. We will use the term 'licensed vehicle' to refer to both hackney carriage and private hire.

Review of policy and legislation

The legislation around licensed vehicles and their drivers has been the subject of many attempts at review. The limiting of hackney carriage vehicle numbers has been a particular concern as it is often considered to be a restrictive practice and against natural economic trends. The current BPG in fact says "most local licensing authorities do not impose quantity restrictions, the Department regards that as best practice".

The most recent reviews were by the Office of Fair Trading in 2003, through the production of the BPG in 2010, the Law Commission review which published its results in 2014, the Parliamentary Task and Finish Group which reported in September 2018, the Government Response in February 2019 and the consultation on "Protecting Users" which closed on 22 April 2019 that resulted in issue of the "Statutory Taxi and Private Hire Vehicle Standards" on 23rd July 2020. None of these resulted in any material change to the legislation involved in licensing. Other groups have provided their comments (including the Urban Transport Group and the Competition and Markets Authority) but the upshot remains no change in legislation from that already stated above.

With respect to the principal subject of this survey, local authorities retain the right to restrict the number of hackney carriage vehicle licenses. The Law Commission 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. It is assumed the Government response to the Task and Finish Group is now effectively the current reaction to this extensive research.

It is also understood that the revisions resulting from the recently closed Government Consultation will eventually lead to a more comprehensive review of the sections of the BPG not affected by the February 2019 Statutory Guide, as stated in para 1.8 of that document – "A consultation on revised BPG, which focusses on recommendations to licensing authorities to assist them in setting appropriate standards (other than those relating to passenger safety) to enable the provision of services the public demand, will be taken forward once the final Statutory Guidance has been issued." The "Statutory Taxi and Private Hire Vehicle Standards" (STPHVS) document suggests the taking forward of the wider BPG review will involve a consultation 'later this year (2020)' with the aim of making "clear recommendations on the measures licensing authorities should consider to enable the trade to react to the demands of passengers". The April 2010 BPG therefore remains valid for our review.

Quality Control and other restrictions

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

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 wheel chair 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 wheel chair accessible fleet, whilst some go as far as also allowing rear-loading conversions. Given the additional price of these vehicles, this often implies a restriction on entry to the hackney carriage trade.

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

Some authorities are considering using deregulation in favour of more sustainable vehicle types as a further potential quality restriction given the urgent need to improve overall vehicle emission standards.

Industry standard evaluation of significance of unmet demand

After introduction of the 1985 Transport Act, Leeds University Institute for Transport Studies developed a tool by which unmet demand could be evaluated and a determination made if this was significant or not. The tool was taken forward and developed as more studies were undertaken. Over time this 'index of significance of unmet demand' (ISUD) became accepted as an industry standard tool to be used for this purpose. Some revisions have been made following the few but specific court cases where various parties have challenged the policy of retaining a limit.

Some of the application has differed between Scottish and English authority's. This is mainly due to some court cases in Scotland taking interpretation of the duty of the licensing authority further than is usual in England and Wales, requiring current knowledge of the status of unmet demand at all times, rather than just at the snap-shot taken every three years. However, the three-year survey horizon has become generally accepted given the advice of the BPG and most locations that review regularly do within that timescale.

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

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

The latest STPHVS requires an update given to the DfT by the end of January 2021 in terms of consideration of the measures included in that document, principally production of a comprehensive policy document, review of if CCTV might be mandated and documentation of passenger complaints.

Case law and unmet demand

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).

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

In one case it was made clear the current guidance is based on the 2010 BPG, whilst in another case having a valid survey meant those challenging had no case for their proposed challenge, and in the final case an authority was clearly told they could not rely on a very old survey which itself could not be produced.

Other recent change affecting hackney carriage licensing

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

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

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

This was enacted from April 2017. There remains no confirmation of any timetable for instigating either the remainder of the Equality Act or the Law Commission recommendations (now assumed to be within the APPG review and consultation and implementation of the STPHVS), with update of the BPG dependent on a consultation to occur 'later in 2020'.

APPG and Government Consultation

During September 2018 the All-Party Parliamentary Group on taxis produced its long-awaited Final Report. There was a generally accepted call for revision to taxi licensing legislation and practice, including encouragement for local authorities to move towards some of the practical suggestions made within the Report. The Government has broadly supported the recommendations of this Task and Finish Group and published what it considered the most urgent changes in the STPHVS document in July 2020.

Despite some opposition from members of the APPG group, the right to retain limits on hackney carriage vehicle numbers was supported, with many also supporting adding a tool which would allow private hire numbers to be limited where appropriate, given reasonable explanation of the expected public interest gains. This latter option is now being taken forward in Scotland, with two studies published and the Scottish Government preparing guidance, although the Government response did not support this option.

As already stated, other groups have provided comments giving their views about licensing matters but the upshot remains no change in legislation from that already stated above. The Scottish Government are moving forward in terms of their application of the potential limiting of private hire vehicle numbers but this is specific to Scottish law and not presently relevant to the English licensing authorities.

Background Conclusions

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. Further, the jurisdiction focusses on the vehicles, drivers and operators but rarely extends to the physical infrastructure these use (principally ranks).

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

Drivers can either be split between ability to drive either hackney carriage or private hire, or be 'dual', allowed to drive either kind of vehicle. Whilst a private hire driver can only take bookings via an operator, with the 'triple-lock' applying that the vehicle, driver and operator must all be with the same authority, a hackney carriage driver can accept bookings on-street or by phone without the same stipulation required for private hire.

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

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

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

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

The Coronavirus Pandemic

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 and began the most significant easing on 4th July 2020. Significant reductions in movement had begun to bite from the previous week. The last dates in 2020 when on-street and rank surveys occurred was effectively Sunday 16th March 2020.

This Survey saw all data collected well in advance of the lockdown apart from the key stakeholders. Attempts were made to add these during mid-July 2020 but their preoccupation with re-establishing their businesses meant none felt able to respond.

All the evidence gathered above will remain valid as a snapshot of the operation of the industry immediately before the lock down and these reports have been produced on that basis, keeping in mind the developing situation as part of our considerations within analysis.

2 Local background and context

Key dates for this survey of demand for hackney carriages for Lancaster City Council are:

- appointed Licensed Vehicle Surveys and Assessment (LVSA) on 28 October 2019
- in accordance with our proposal of early October 2019
- as confirmed during the inception meeting for the survey held by telephone on 5 November 2019
- this survey was carried out between November 2019 and February 2020
- On street pedestrian survey work occurred in October 2019, January and February 2020 (all on Wednesdays)
- the video rank observations occurred in mid-November 2019
- Licensed vehicle driver opinions and operating practices were canvassed using an electronically available and posted out survey during November 2019 for return by mid-January 2020
- Key stakeholders were consulted throughout the period of the survey with a final trawl in July 2020
- A draft of this Final Report was reviewed by the client during August 2020 (delayed due to resource implications of the coronavirus pandemic)
- and reported to the appropriate Council committee following acceptance by the client.

Lancaster City Council is one of twelve districts within the higher tier Lancashire County authority, with two further authorities in the formerly larger area that are now unitaries. Both those two authorities, plus five further authorities within Lancashire, retain limits on vehicle numbers and review this regularly although there is one further district that retains the limit but has not recently reviewed this formally. This current survey is occurring at the same time as that for two other Lancashire authorities.

The authority has a current population of 142,861 using the 2019 estimates currently available from the 2011 census. This is around a 1.5% increase since the last survey was undertaken but a greater level of growth than the 0.3% from the 2013 study to 2016.

The area has four main population centres, Lancaster, Morecambe, Heysham and Carnforth. Most of the population is in the first two locations, with about a third of population in Carnforth and the rural parts of the council area. The area lies just off the principal M6 route between the Midlands, North West and Scotland, and has the only station on the West Coast main line within the area at Lancaster. Both highway and public transport link Morecambe, Heysham and Carnforth using secondary routes, albeit routes now included in the considerations of the 'Northern Powerhouse'.

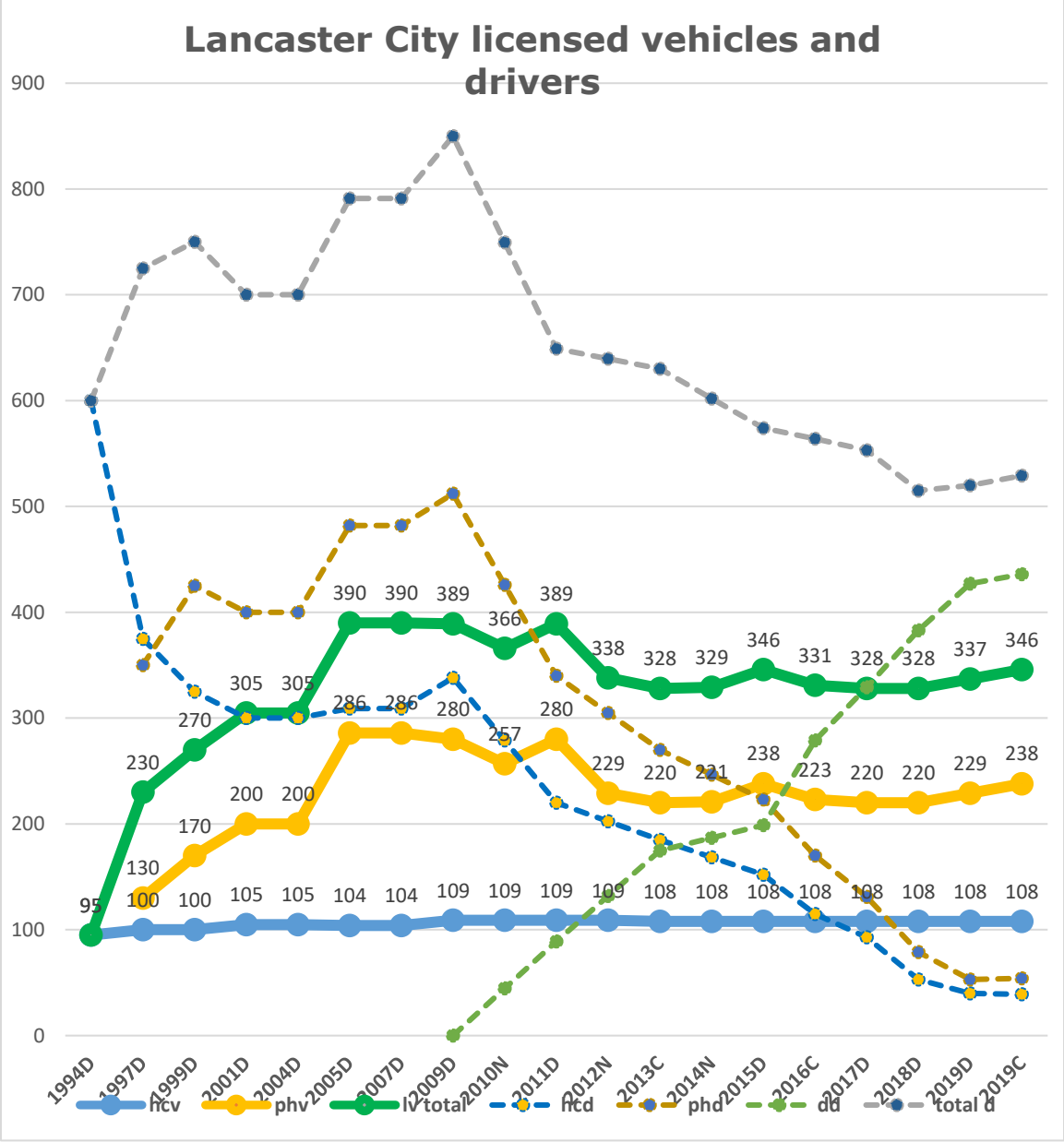
Highway and transport powers are mainly at the higher tier County authority level. These are summarised in the Local Transport Plan 2011 to 2021 and the Lancaster District Masterplan approved in October 2016. The key aims of the Masterplan are improving access from the area to the M6. An upgraded M6 junction to the north of the City sought to provide better access to the University by relieving pressure on the Lancaster central gyratory. In 2018 the latest Local Plan document was published covering 2011-2031.

With reference to licensed vehicles, the principal mention is their use as part of the third hierarchy of choice after ultra-low emission buses and other buses. The suggestion is to seek ultra-low emission licensed vehicles with policies seeking to favour them over other non low-emission vehicles.

We understand that Lancashire provides limited powers to its districts with respect to being able to instigate some new rank provision, principally by part time use of what would otherwise be (unused) loading bays. These powers have been used more widely in other districts we have studies since the last Lancaster study, particularly in Hyndburn.

Lancaster City Council has chosen to utilize its power to limit hackney carriage vehicle numbers, and as far as we are aware has done so since at least 1994. The authority has held very regular reviews of this limit and its level (see further below). This resulted in plate issues of five in both 1996 and 2001 and four in 2005, all of which were required to be wheel chair accessible style and which must remain in this style. Current saloon owners have no such requirement and can choose to use WAV style or otherwise, and revert to saloon if they so wish.

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



Licensing Statistics from 1994 to date

The graph above shows the two small additions made to hackney carriage vehicle numbers around 2000 and 2008 and marginal reductions in the total numbers in both 2004 and 2012. There are now 8% more hackney carriage vehicles than in 1994.

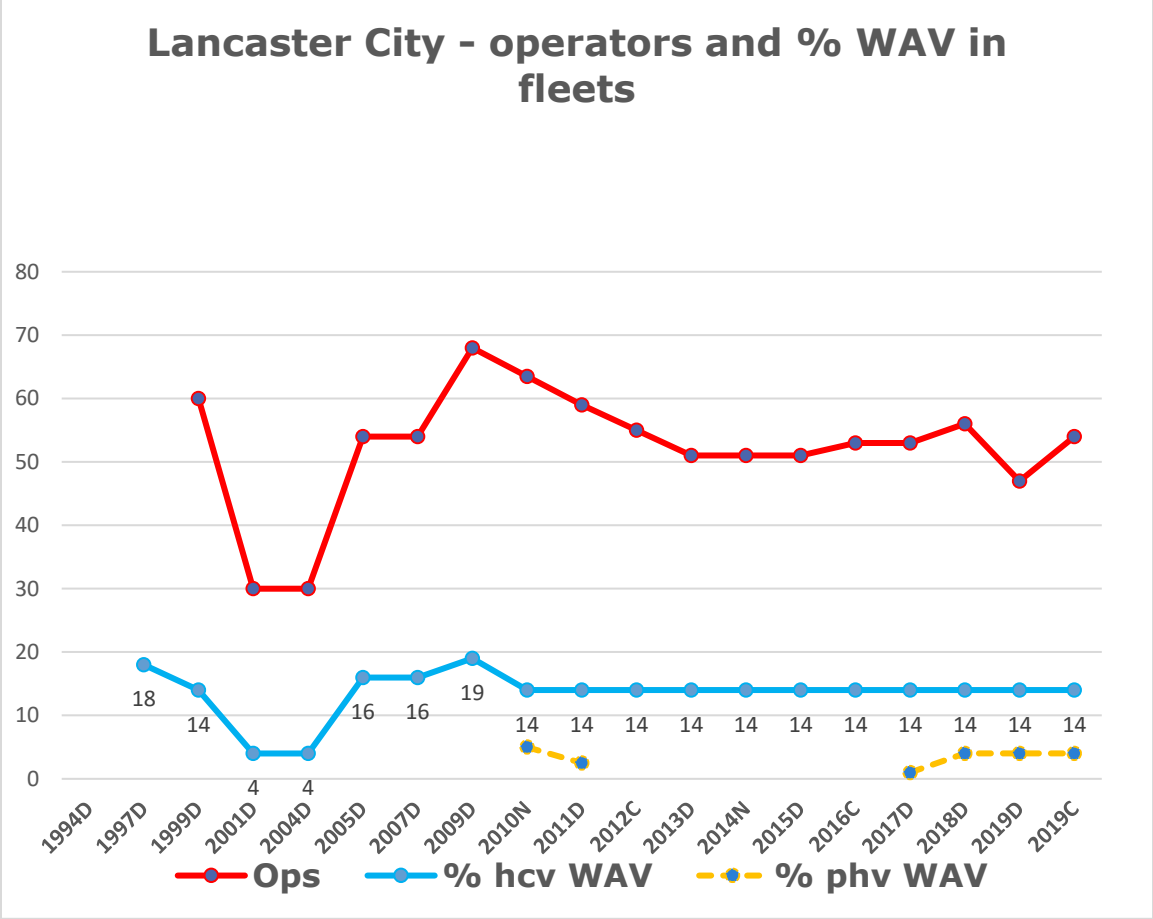
Private hire vehicle numbers, not limited, and directly theoretically responsive to market levels of need, saw their maximum growth between 1997 and their peak in 2005. Since that time, there has been a general trend of reducing numbers although they saw 8% growth over the last few years since 2017. Net growth since 1997 has been 83%.

LVSA

This means the proportion the hackney carriage vehicles are of the fleet has dropped from 43% in 1997 to 31% at the current time, although this remains a high proportion for an area with long term hackney carriage vehicle limits. The local fleets have a number of private hire companies for whom hackney carriages regularly work which means the two fleets are far from distinct. In this case it appears that many private hire vehicles have been supplanted by hackney carriages that also spend a significant proportion of their time on private hire operating circuits due to low rank demand levels.

With respect to drivers, there has been a switch towards dual driver licences although this transfer is not complete and it appears the level of those retaining vehicle type specific licences seems to have stabilised. Although this generally led to a reduction in overall apparent driver numbers until 2017 (reflecting the removal of duplicate holdings) more recently there has been some overall growth in driver numbers – a change since the last survey. This seems to be in line with the growth in private hire vehicle numbers over a similar period.

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



Operator numbers and levels of WAV provision in the fleet

This graph shows a very similar profile for operator numbers compared to overall private hire vehicle numbers although recent years have tended to see more stability than in the past.

With reference to WAV style vehicles, the formal hackney carriage fleet provision has remained stable since the final introduction of the last set of five plates required to remain as WAV. There are now a total of 15 such vehicles that must always remain WAV style. There are a small number of private hire WAV but as in most places this level is very low.

Considering the overall level of WAV in the licensed vehicle fleet using the March 2019 DfT statistics, Lancaster has around 7% of its total vehicle fleet (hackney carriage and private hire) that are WAV style. This is very similar to eight other authorities with limited hackney carriage vehicle numbers, Pendle, Weymouth, Leeds, Chorley, Aylesbury Vale, Torbay, Crawley and Dover (for all of whom there are recent demand surveys), although Lancaster has a much higher proportion of the WAV fleet in the hackney carriage sector than some, but much less than others.

National averages are 14% hcv WAV, 3% phv WAV and a net 14% WAV overall. Lancaster is 177th out of the 292 English licensing authorities in the all-vehicle comparison although many of those authorities which are above Lancaster in the table are the fully WAV authorities.

Limit review policy

Lancaster undertakes very regular review of its policy to limit hackney carriage vehicle numbers in line with the BPG. The previous surveys were in 2016, 2013, 2010, 2007, 2005, 2000 and 1996, giving a very regular and BPG-compliant level of review of the limitation policy. Comparison of results and the latest evaluation are provided in later chapters.

Other public transport

National statistics are published for all 2,629 rail stations in Great Britain, with the latest information relating to the year ending March 2019 published in January 2020. The detailed information is provided in Appendix 7.

There are seven stations in the Lancaster licensing area. Lancaster is the busiest, being 282nd highest in terms of total entries and exits estimated – some 2,122,814 in the latest figures. Morecambe is second busiest, being 1,418th in the UK table with 195,956. Carnforth, Bare Lane, Silverdale, Heysham Port and Wennington follow, with the latter being the smallest and 2,408th with 4,768 in the latest year.

All but Wennington and Lancaster have seen declining patronage since the last survey, mainly related to recent timetabling issues. Since the last survey, Lancaster has grown by 4%, with doubling in flows since the data was reported in 1997/98. Comparison to the rank flows is made in the rank chapter below.

3 Patent demand measurement (rank surveys)

As already recorded in Chapter 2, control of provision of on-street ranks in Lancaster City Council's licensing area is under the control of Lancashire County Council. They are held within the context of other highway legislation across the County with enforcement against abuse by private vehicles also at County level. The City, however, has direct powers to ensure the ranks are properly used by hackney carriage vehicles and can enforce against abuse of them by private hire vehicles.

Appendix 2 provides a list of ranks in the Lancaster licensing area at the time of this current survey. There have been no major changes since the last survey and a period of effective consolidation since the major changes that occurred between the previous two surveys.

Our methodology involves a current review both in advance of submitting our proposal to undertake this unmet demand survey and at the study inception meeting, together with site visits where considered necessary. This provides a valid and appropriate sample of rank coverage which is important to feed the numeric evaluation of the level of unmet demand, and its significance (see discussion in Chapter 7). The detailed specification of the hours included in the sample is provided in Appendix 3. This also includes an outline assessment of the full set of ranks observed. Detailed results by rank, day and hour are in Appendix 4.

2019 Observations

The 2019 rank observations covered an expanded sample designed to be further improved in robusticity based on our experience since the last survey. In essence, a larger off-peak sample of hours has been added and the new option of quick-watch used to give complete certainty about rank locations that see very little or no usage. Further, the station was observed for all three days of the survey even though this is a private location requiring a further permit that reduces the number of vehicles that can service this location in addition to any council restriction on hackney carriage vehicle numbers.

In order of 453 hours of rank observations were therefore included in the sample. This provided some 3,261 passengers leaving in 1,966 hackney carriage departures from ranks across the licensing area. The observations recorded some 10,315 different activities at the ranks over the survey period. 74% of these activities were vehicles arriving or departing (with or without passengers). The remainder were passengers arriving, walking away, or a range of other general comments about activities noted affecting the rank such as nearby demand generators closing or opening, etc.

Of all the vehicles observed at the ranks, 73% were hackney carriage arrivals and departures. A further 14% were private hire vehicles, 11% private cars, 1.3% goods vehicles, and 0.1% emergency vehicles. In terms of vehicle activity levels, the most activity, some 36%, occurred at or near the North Road, Diggles rank. 20% of vehicle movements were at the station, 15% each at Lancaster Bus Station and Market Street, Morecambe and 10% at Lancaster Common Garden Street.

With respect to issues with ranks being used by other vehicles, the worst level of issue was at Morecambe Marine Road Central, where 61% of the vehicles observed were private cars although most of these were when the rank was not being used by hackney carriages. Some examples were observed of vehicles moving when hackney carriages made use of this location. Market Street Morecambe saw 35% private cars, principally arising from people needing to pick up or set down near to the shopping centre entrance, but also again at times the rank was not in use. The next highest issue was 14% of vehicles at Common Garden Street being private cars. All other ranks saw some private cars use the rank, but at very low levels (even the bus station rank saw a very small number of such vehicles).

The largest area where private hire were observed at a rank was at the Diggles location. These vehicles were often picking up or setting down at times when the rank was not being used by hackney carriages, principally during the daytime, but also included some legitimate use of the area otherwise used by hackney carriages as an informal feeder when usage is high. Whilst the single rank space is more than enough for daytime trade, it is woefully inadequate when the main use of the rank occurs at night. The issue is compounded by the feeder area also being very close to a private hire booking office.

Overall rank usage estimates

The sample of rank hours observed was used to produce an estimate of the typical level of patronage at each rank. The table below shows the resulting average weekly estimates of rank usage by passengers, and compares this to results available from previous surveys.

Rank	2019	2016	2013	2010
Lancaster Station (private)	2,539 (40%)	1,687 (27%)	1,538 (20%)	2,113 (20%)
North Road, Diggles	1,910 (30%)	1,848 (29%)	3,482 (47%)	332 (3%)
Damside Bus Station	1,046 (16%)	1,791 (28%)	Closed	5,161 (48.5%)
(total of two above)	(2,956)	(3,639)	(3,482)	(5,493)
Market St and feeder, Morecambe	545 (9%)	600 (9%)	1,110 (15%)	1,668 (16%)
Common Garden Street and Brock St	286 (5%)	50 (1%)	209 (3%)	Not avail
North Road, Toast	Club gone	Club gone	478 (6%)	684 (7%)
Marine Road, Morecambe	11 (0.0%)	280 (4%)	284 (4%)	512 (4%)
Tunstall Street, Morecambe	4 (0.0%)	29 (0.0%)	Not there	Not there
Penny St KFC	2 (0.0%)	25 (0.0%)	93 (1%)	42 (0.5%)
Sun Hotel	Gone	20 (0.0%)	204 (3%)	Not in place
Dalton Square	Gone	Gone	107 (1%)	Not in place
Gage St	Not observed	Not observed	Not observed	0 (0%)
Total	***6,343***	***6,330***	***7,505***	***10,512***
Difference from previous survey	***Same***	***-16%***	***-29%***	***n/a***
Difference from 2010	***-40%***	***-40%***	***n/a***	***n/a***

The table shows that the highest passenger volumes in 2019 estimated were at the private Lancaster Station rank. This took some 40% of the total estimated passenger numbers observed. The North Road, Diggles rank saw around 30% of patronage followed by 16% at the Damside Bus Station rank in Lancaster. The Market Street rank in Morecambe saw 9% of passengers with Common Garden Street seeing 5%. Marine Road, Morecambe, Tunstall Street Morecambe and Penny Street, Lancaster all saw a very small number of passengers but nothing of any real significance, although the locations are not completely unused.

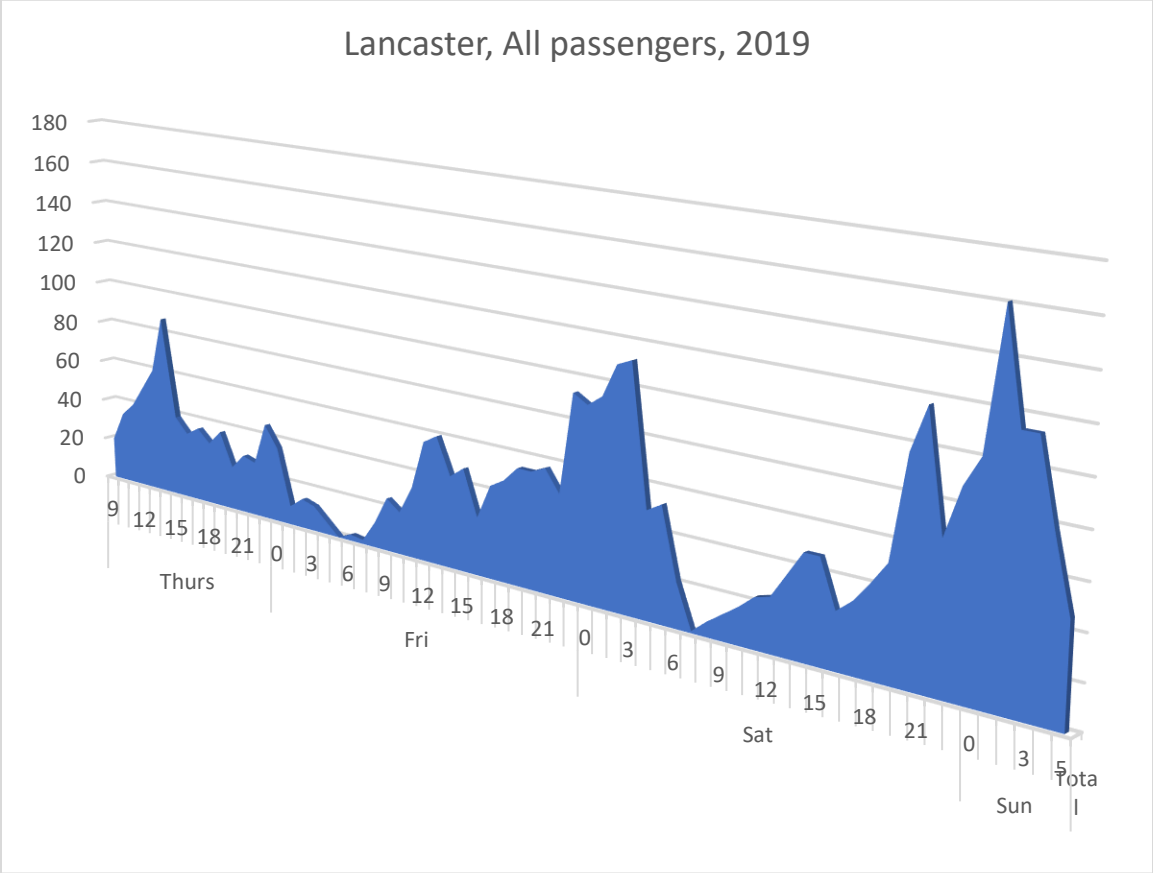
In terms of comparison to previous surveys, the current level of estimated passengers is remarkably similar to that from the last survey. However, there has been some redistribution amongst the ranks with the Station at Lancaster seeing growth in actual numbers and share and Common Garden Street also seeing significant growth in both number and share for a small rank.

The North Road, Diggles, rank has seen a very small increase in usage and share whilst the Damside Bus Station rank in Lancaster has seen a significant fall in both numbers and share. Marine Road Morecambe, after its move, does not seem to see anywhere near as much usage. Penny Street and Tunstall Street have both seen further reductions in passenger numbers but only from already very low levels.

The level of estimated passenger numbers remains reduced from the level observed in both 2010 and 2013 although it appears there has been no further reduction and that current demand levels are remarkably stable at the end of 2019.

Detailed rank usage by location and time

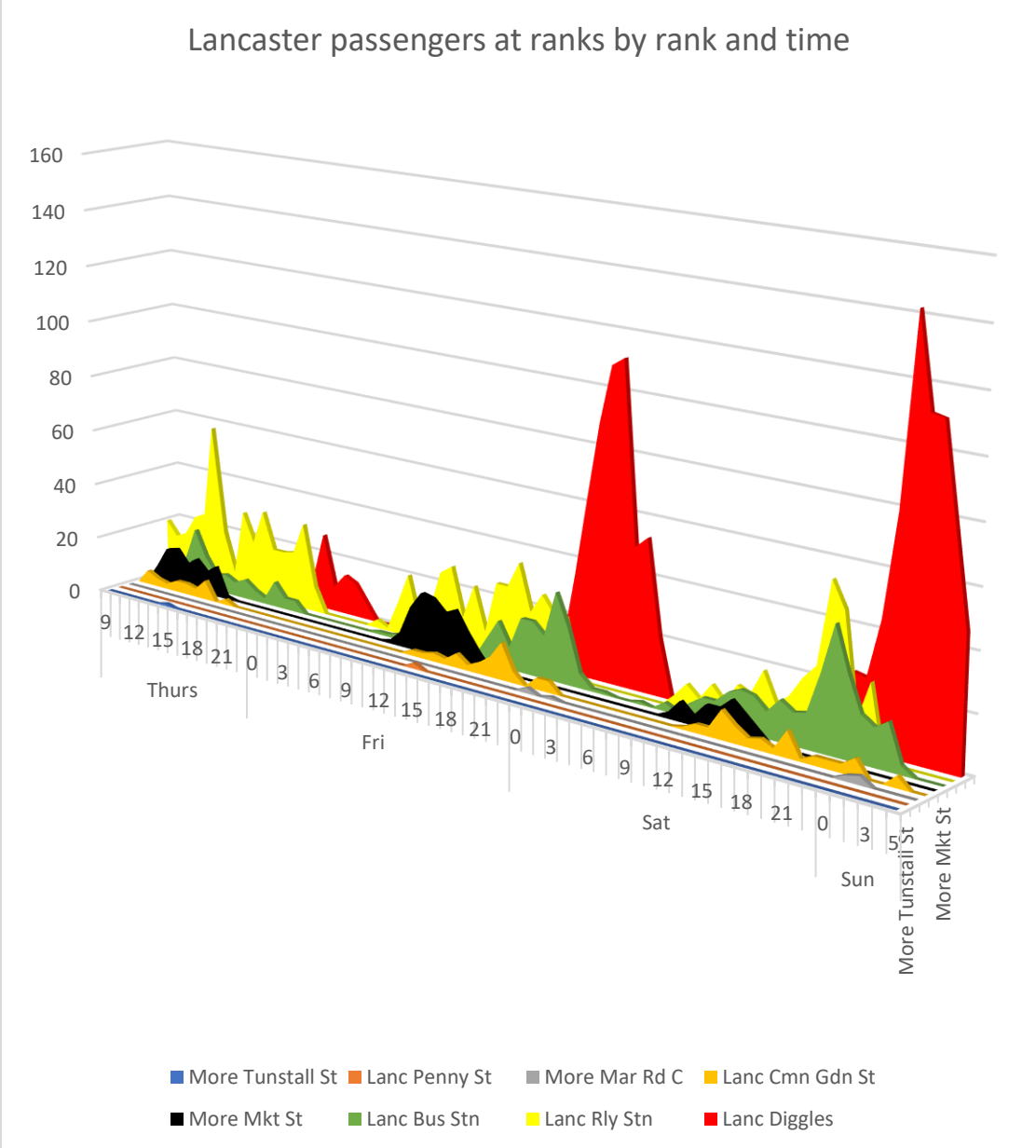
The graph below provides the profile of passenger demand across all ranks operating in Lancaster over the survey period. Given that all hours at all ranks were observed, this is a true profile of total demand across that period.



The graph shows that Thursday flows tend to be lower than Friday, with flows generally peaking during the morning and then decreasing, with very little overnight demand. Friday has higher flows and a morning peak and a larger late-night peak. Saturday flows begin lower, with a pre-lunch peak, further growth to an early evening peak, and then final growth to the overall peak flow of some 161 passengers in the 01:00 hour in the early hours of Sunday.

Inspection of the information feeding this graph shows the peak flow is some 3.4 times the average flow per hour which is 47 passengers. The profile also only sees one hour (05:00 on Friday morning) with no passengers anywhere in the licensing area at ranks, with every other observed hour having at least one passenger using a rank somewhere in the area.

The graph below presents passenger flows by hour for each of the separate ranks over the survey period.



The graph shows the extreme and peaky demand at the North Road, Diggles rank in Lancaster. This rank, although available for 24-hours, only tends to operate in evenings and into the early hours is used on every night, but much more so on Friday into Saturday and even more from Saturday into Sunday. On both Friday and Saturday nights this is very clearly the busiest rank and the only location with more than 60 passengers in any hour in the area. The Thursday peak at this rank is earlier, with the profile of demand reversed compared to the Friday and Saturday, where the peaks tend to be later.

The Lancaster railway station rank has a very jagged passenger profile. This is not unusual for a station where there are spread out train arrivals. Such highly peaked demand is very difficult to service and needs a relatively higher proportion of vehicles to meet adequately (see further discussion later).

The bus station rank in Lancaster tends to be daytime only. Whilst Thursday sees the main peak in the late morning, there are late evening peaks on both Friday and Saturday. The general level of demand at that location is generally lower on Saturdays, but with a higher peak.

Market Street in Morecambe is very tied to the operating hours of the nearby shopping centre, servicing this demand only. Common Garden Street in Lancaster is similar to this on the Thursday but does see later and more extended operating hours on the Friday and Saturday, albeit at lower levels.

Marine Road Central Morecambe only sees a small amount of usage, all in the early hours of Saturday and Sunday mornings.

Unmet demand – surveyed hours with observed unmet demand

Each hour of rank data was sorted to identify the highest level of average passenger delay. Of the 467 hours of data included in our sample, 6% had average hourly passenger delay values of a minute or more, with a further 9% with values of 59 seconds or less. These figures include all ranks including the private station rank.

Considering passengers in total, 9.4% actually experienced a wait of a minute or more. This can be broken down into 0.4% of passengers who waited for 11 minutes, 2% who waited between six and 10 minutes, and 7% that waited between one and five minutes. The longest wait experienced was 16 minutes. This wait also produced the highest average passenger delay (APD) in any hour, and the only such APD over five minutes. This particular instance occurred at a time of generally very low demand, known as ‘thin’ demand which is notoriously hard to service well.

59% of the delays of a minute or more occurred at the Lancaster Station rank. As noted above, this location sees very peaky passenger demand determined by the profile of train arrivals. Such demand is difficult to service well and requires generally more vehicles for the same level of overall demand. This is exacerbated by the additional restriction on permits at the station, which is out of the control of the council. This also leaves the Council with very little influence over the impact of this on general service levels. In terms of evaluation of significance of unmet demand this is why such locations are generally excluded from such estimates.

There were no occurrences of persistent passenger queues forming for lengthy periods, at any locations.

The delay data was inspected by day and hour to see if there was any systematic shortage of hackney carriage vehicles. The profile suggested no particular hours with notable shortages but also showed most delay tended to occur more with lower flows than higher. There were very few significant delays observed in the hours with highest flows – proving there are sufficient vehicles to meet high levels of demand, but also demonstrating that the potential focus of many hackney carriages on peaks or on phone demand at lower demand times can impact rank service levels. Further discussion of this occurs in the chapter considering significance of observed unmet demand.

Unmet demand – persons walking away from ranks

The number of people arriving at ranks and then walking away without using a hackney carriage or other vehicles was noted. This occurred most at the Diggles location, with 63 different occasions recorded, some with up to five people in the group. There were other walk-aways noted at Lancaster Bus Station, Lancaster Railway Station, Lancaster Common Garden Street and Morecambe Market Street, but none were significant.

Plate observations

Observations were undertaken on the Saturday of the rank observations to identify the licensed vehicles operating at the time of what was expected to be the busiest day of the survey. An hour was observed at the Market Street rank and a further hour and a half at the Promenade rank both in Morecambe. Observations were undertaken for all licensed vehicles passing by the Bus Station rank in Lancaster for two hour-and-a-half sessions, one early afternoon and one over midnight. A total of 247 vehicle movements were observed.

All observations were reviewed to identify current Lancaster licensed hackney carriages and private hire vehicles from those observed, using the list of vehicles licensed by the council at the time of the survey. Two records were incomplete and a further 10 were not current local licensed vehicles. The remaining records were then evaluated to understand the activity level of the fleet observed.

146 different hackney carriage movements were observed. These accounted for 54% of the plates on issue at the time of the survey. The observations at Morecambe Market Street accounted for 5% of the fleet whilst those at Promenade later saw 6% of the fleet. In Lancaster, the afternoon observations saw 12% of the fleet rising to 39% in the over-midnight observations.

With respect to total vehicle observations, Market Street accounted for 5% of all the vehicle observations in total, Promenade 5%, daytime Lancaster 19% and the night observations some 71%. This clearly demonstrates the focus of activity for hackney carriages in the area being night-time in central Lancaster, both in terms of total vehicle movements and in terms of numbers of different vehicles involve, i.e. both more vehicles and more frequent operation of these occurs.

Of all the hackney carriage plates seen, just 12% were seen in more than one of the survey periods. 7% were seen in both Lancaster samples and 2% each were seen in the Lancaster day and Morecambe Promenade, Lancaster night and Morecambe Promenade, and Market Street and Lancaster night samples. This suggests the fleet is split almost exclusively between the two main parts of the authority, although there is clearly some small amount of movement between, and that quite a few vehicles focus on servicing the main night demand.

101 different private hire vehicle movements were noted. Of these, 62% were in the Lancaster night sample, marginally lower than the hackney carriage proportion, but still the bulk of activity. Daytime Lancaster accounted for 34%, none were seen in Market Street Morecambe and 4% along Morecambe Promenade.

Disability use of ranks

Four people were observed during the course of the survey accessing hackney carriages at ranks in wheel chairs. Three of these were at the railway station rank in Lancaster with one at Morecambe Market Street.

A further 44 people were observed at ranks needing assistance into vehicles, often having visual disabilities such as walking with a stick. 31 of these were at Market Street, Morecambe, seven at Lancaster Bus Station, 4 at Lancaster Common Garden Street, and two at Diggles, Lancaster.

4 General public views

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

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

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

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

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

More details of the results of the on-street responses are included in Appendix 5.

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.

This survey considers the full Lancaster licensing area. However, on street interviews were undertaken only in the main two centres taking on board the need to obtain reasonable sample numbers within fair timescales. A total of 98 interviews were obtained in Lancaster and 94 in Morecambe, a robust sample for the purposes of this data collection exercise.

The proportions of key population statistics were compared to the estimates for the area from the latest 2019 estimates based on the last census and the most recent update to this information. The sample for Lancaster exactly matched the gender profile from the census, with slightly more females than males. However, the Morecambe sample interviewed less males than in the census (27% interviewed compared to 49% in the census), with the overall area comparison impacted by this giving 38% males interviewed compared to the 49% of the census.

For the age profile, the Lancaster sample interviewed more of the middle group (43% compared to 33%) whilst the Morecambe group matched this element exactly whilst seeing a much higher proportion of the older group (54% compared to 39% census). The overall impact on the age profile interviewed was that less younger people were interviewed than in the census (18% compared to 28% in the census) with more of the two older groups (38% middle group compared to 33% census and 43% older group compared to 39% census), although the overall impact is likely to be low.

All of those interviewed in Morecambe claimed to be from the area whilst just one Lancaster interviewee said they were not from the area – suggesting the views obtained represent those of people locally.

A very high 93% of those interviewed in Lancaster and 99% of those interviewed in Morecambe said they had used a local licensed vehicle in the last three months in the area. This is much higher than results from either previous survey.

All respondents provided an estimate of how often they used a licensed vehicle in the area. In both areas, the highest proportion, 21% in Lancaster and 24% in Morecambe, said they used them once or twice weekly. The resulting estimate of trips per person per month is 4 for Lancaster and 5.9 for Morecambe. This is also much higher than the previous survey, although the variation between the two areas remains in the same direction suggesting higher usage in Morecambe.

When a similar question was asked, but directed at specific use of hackney carriages only, the main level of usage for Lancaster was 23% saying once or twice monthly whilst for Morecambe a third of respondents gave that answer, providing 2.3 trips per month by hackney carriage for Lancaster and 4.8 for Morecambe.

The share of licensed vehicle trips made by hackney carriage in the area is quite high – 58% in Lancaster and an even higher 82% in Morecambe. This is also reflected in the response that no-one in Morecambe and just 1% of people in Lancaster cannot remember when they last saw a hackney carriage in the area. Further, in Morecambe none said they could not remember the last time they used a hackney carriage, with the value for Lancaster being just 15%, very low on a national comparison. This may be a result of the relatively high level of operation of hackney carriages on private hire circuits.

Respondents told us their normal method of getting a licensed vehicle in the area. Many gave multiple responses. The overall share of responses saw 51% say phone in Lancaster (56% Morecambe) and 41% rank in Lancaster (37% Morecambe). These are also very high values and again much greater than in the previous survey. Hailing was 2% in Lancaster but zero in Morecambe, whilst app usage was 4% in Lancaster and again zero in Morecambe, suggesting the latter area much more traditional in outlook with regard to use of licensed vehicles.

People were asked which companies they used when phoning for vehicles. The number of companies quoted was very small, just four – suggesting very little competition other than between three big players. One company obtained 51% of all mentions in Morecambe, followed by another there with 43% and the other with just 6%. In Lancaster there were two companies dominant with 42% each with the third company having just 15%. Those in Lancaster using apps named two of the three companies given in the telephoned company question. There was no mention of any national apps or any hackney carriage based facilities.

67% of those in Lancaster and 61% of those in Morecambe said they knew the difference between hackney carriage and private hire vehicles.

People were then asked to give the main way they knew the difference. There were no multiple responses allowed. The top two reasons given were consistent between the areas. 44% in Lancaster and 48% in Morecambe said the main difference was that hackneys could be hailed. 25% said private hires were pre-booked in the Lancaster interviews whilst this level was higher at 34% in Morecambe.

In Lancaster 17% said a key difference was hackney carriages had a light on their roof with no-one in Morecambe mentioning this – but 12% there said private hire could not use ranks, whereas only 3% said this in Lancaster. Both areas saw some other differences quoted, all of which were correct.

It is interesting that the focus on defining the vehicle seems to be principally their way of operating and being obtained, rather than physical differences to the vehicles themselves although these were mentioned, but by a minority of those responding.

95% of all those interviewed told us what ranks they were aware of in the area and if they used them. Of these, 47% named three locations, 37% two and 16% named a single rank they were aware of. This suggests a good knowledge of ranks across the area.

Across the area, 54% of those naming ranks said that they used them. This proportion was marginally lower in Morecambe (53%) and marginally higher in Lancaster (55%) but not significantly different. Of all the locations named, six were definitely used by those quoting them, and five were definitely not used (see mentions below).

28 different names were given for ranks, some of which were different names for the same rank, with some being general locations, such as "Heysham" (the person quoting this said they did not use it). The rank given most different names was the Promenade location in Morecambe, with four different names presumed to be that location. North Road was given two other names as well as being named directly once.

For the whole area, the highest level of mention for a rank was for the Bus Station rank in Lancaster, with 20% of overall mentions but 38% of those in Lancaster (with 3% of mentions in the Morecambe sample). 56% of respondents said they used it. The next two most cited ranks were the Promenade, Morecambe and Arndale rank in Morecambe, with 15% and 13% for the total sample, 29% and 25% of the Morecambe totals (with a small amount of mention for the Promenade in the Lancaster sample but no mention of the Arndale at all by Lancaster respondents). 45% said they used the Promenade and 66% the Arndale ranks.

The Train Station rank in Lancaster obtained 10% overall and 20% in the Lancaster sample, with a few mentions by Morecambe respondents. 42% said they used it, a relatively low proportion.

Two other ranks obtained 9% in total – Pedder St, Morecambe, assumed to be Tunstall Street (with 17% of Morecambe mentions and none in Lancaster)(57% said they used it), and Penny Street Lancaster which obtained 17% of Lancaster mentions (none in Morecambe)(47% said they used this rank).

North Road Lancaster gained 7% of the overall total of mentions, with a few in Morecambe but most in Lancaster with 13% of the share of mentions from there. 64% said they used it.

Of the remaining quoted locations, none gained more than 4% of the total mentions, with just three being known rank locations (Common Garden St (67% said they used it), Gage St (75% said they used it) and the still-marked location on the A589 outside The Platform public house)(a third said they used it). Others were supermarkets or general locations. One supermarket location was used by all who quoted it (Sainsbury Lancaster) whilst the other (Morrison's Morecambe) saw 76% say they used it. 57% said they used the rank they were aware of at Lancaster University. Whilst some of these quotes could be obtaining private hire at these locations it may be worth adding quick watch options in the next survey at some of these sites.

All respondents provided views on various aspects of the service provided on their most recent licensed vehicle trip. For nearly all aspects in both areas the largest response related to 'very good', suggesting very high levels of satisfaction. This was confirmed by there being very few very poor or poor scores at all.

As is usual, the main area where scores were lower related to price, but even here the highest score was for 'good' in both locations, although this was also the score where there were 4% and 3% "very poor" in Lancaster and Morecambe respectively. The only other variations were that the highest score, of 62% was for good for vehicle repair state in Morecambe (but no average or less scores), and a more spread out score, including 2% very poor and 1% poor, yet still with 48% "very good" for Lancaster driver knowledge. Whilst this still suggests an excellent overall service, these marginal differences may be worth giving some effort in the spirit of 'continual improvement'.

There was one comment from Morecambe suggesting some drivers were not patient with the elderly or infirm and two also from Morecambe concerned about overcharging – but again these are only worth noting and far from being significant.

Less respondents provided answers to the question seeking things that might encourage them to use hackney carriages or use them more often. For both areas the top items that would encourage or increase hackney carriage usage were better vehicles and more hackney carriages available by phone, both scoring equally, with a higher level in Morecambe (40% each) compared to Lancaster (27% each). In Lancaster 16% said nothing would increase or encourage them to use hackney carriages with 11% saying cheaper fares. The only other comment in Morecambe was seeking CCTV in vehicles. Two people in Lancaster made comments that more WAV, ramps and better wheel chair accessibility was needed.

Respondents were asked if they, or anyone they knew, needed an adapted licensed vehicle to travel. Those saying 'no' accounted for 66% in Lancaster and 74% in Morecambe, suggesting a much higher need for adapted vehicles in this area than in many other places. Of those saying an adapted vehicle was required, the bulk required a WAV style rather than any other adaptation. About twice as many in both cases knew someone that needed a WAV rather then them directly needing it themselves.

When asked how people would obtain a WAV, 98% of those in Lancaster and all those responding in Morecambe said they would phone for the vehicle (or pre-book it another way), with just 2% saying rank in Lancaster.

31% in Lancaster and 39% in Morecambe felt those that had disabilities got a good service from hackney carriage vehicles and drivers. In both samples 30% felt they did not. 12% in Lancaster and 20% in Morecambe of the entire total of people responding said there were not enough WAV available.

People were then asked regarding latent demand by a request to tell us if they had ever given up waiting or made other arrangements to get hackney carriages either at a rank or by hailing. 14% said they had issues at ranks in the Lancaster sample whilst 8% had similar issues in the Morecambe sample. This was investigated further to confirm if the locations were at active ranks or not. For the Lancaster respondents 11% had given up at Lancaster ranks, with 2% giving up at the private station rank. For Morecambe respondents, 2% had given up at unspecified Lancaster ranks, 2% at specific Morecambe ranks and 1% 'in Morecambe'. This suggests an overall area latent demand factor of 1.08 for council ranks with 1.01 for the private station rank, and a combined value of 1.09.

For hailing, the level of latent demand was much lower, being 2% for the Morecambe respondents and 6% for Lancaster.

This provides an all-area council rank and hail based latent demand factor of 1.12 rising to 1.13 for a full evaluation including the private station rank.

77% of Lancaster respondents and 78% of Morecambe respondents felt there were enough hackney carriages in the area between 19:00 and 07:00.

99-100% of respondents felt safe using daytime licensed vehicles in Lancaster and Morecambe respectively, with the overnight value being marginally lower at 98% in both areas. None from Morecambe made any suggestion about how they might feel safer, whereas a small number of Lancaster respondents gave different items with only more female drivers having more than one response.

Most people gave their view regarding fares. In Lancaster 50% felt they were fair, 43% cheap, and 4% expensive whilst in Morecambe 71% said they were fair, 22% cheap but 7% expensive. This suggests fares are not a major issue in the area but with more interested in lower fares from the Morecambe sample.

35% in Lancaster and 22% in Morecambe would choose an electric powered vehicle with a further 9% and 2% respectively doing so if it did not imply increased costs of travel.

In terms of potential use of credit card machines, the highest proportion in both areas said they would still pay in cash (45% Lancaster, 55% Morecambe), with a very similar level of 41% or 40% happy to use as long as it did not mean costs increased. 13% in Lancaster and 4% in Morecambe would use them for every journey.

5 Key stakeholder consultation

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

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

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

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

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

Where the statistical analyses in Chapter 2 demonstrate low levels of wheelchair accessible vehicle (WAV) provision, an increased emphasis will be given to the issue in terms of the focus of stakeholders but also in specific efforts to contact disabled users and their representatives. However, it must be remembered that none of our consultation is statutory and for cost effective and fixed budget reasons we limit our attempts to contact people generally to a first attempt and reminder.

Further listing of who has responded and how is provided in Appendix 6 but ensuring privacy where appropriate for those contacted. Unfortunately, with the coronavirus pandemic occurring before final contact had been made, despite repeat requests (by email, as phone options were discounted due to their focussing on customer needs or being un-manned), no-one felt able to make any response.

Supermarkets

Checks with most supermarket phone lines received messages that people should obtain information from net-based sources given that most staff were focussing on keeping stores stocked and customers safe.

Hotels, Public houses, Night clubs, Other entertainment venues, Restaurants

Most of these locations were not active until early July, and contact was sought mid-July to allow re-opening peak contacts by customers to occur. Some emails were acknowledged but no response was provided.

It was not felt appropriate to push for responses during this difficult period, together with the usual situation that 'no response is good' being assumed that if there were issues, people would make contact.

One disabled person from the previous survey was contacted again and told us that things had improved a bit in terms of obtaining WAV as he had built up a relationship with one local company. This person bought a powered chair in order to reduce their need for shorter journeys, which did reduce their need for WAV services. This had reduced their need for WAV to once a week for shopping and other trips connecting to rail services, for which they would revert to their manual chair, being aware the powered chair reduced the options available. They retained some frustration that it appeared that the trade took advantage of benefits to add WAV vehicles but did not then prioritise their use in favour of calls for WAV ability for trips.

The council licensing section are not aware of any other issues about availability of licensed vehicles being raised, which again suggests there are no significant issues since people would tend to make their views known were there any such issues.

6 Trade stakeholder views

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

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

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

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

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

There were only five responses received, 40% from hackney carriage, 40% from private hire and 20% from someone who said they had a dual license and drove both kinds of vehicle. The drivers responding had an average of 16 years experience but ranging from eight to 28 years.

60% of the sample worked six days, 20% five days with the other person not having worked. The average hours worked were 38 with a maximum of 60 from the four drivers who had worked.

20% said their hours worked were affected by avoiding times they thought passengers would be disruptive. The remaining four all worked around family commitments or their own preferences.

80% owned their own vehicle. 40% said someone else also drove the vehicle they used.

All respondents accepted pre-bookings. These were by a variety of methods including direct phone, contracts, through their office or data head and through an app. Two large companies were named but hackney carriages also took their own bookings direct.

The drivers were from those who serviced the Promenade rank in Morecambe and from the rail and bus stations in Lancaster and Common Garden Street rank. This is a relatively comprehensive response, apart from the daytime rank cohort in Morecambe.

60% agreed the limit should be retained.

In terms of work obtained, half said their main method was bookings and half said ranks.

One person had received 20 requests for taking passengers in wheel chairs whilst two others that responded had received no such requests.

40% felt the current fare scale was about right and 40% felt it needed to be increased.

Respondents were given the option to identify what might encourage them to change their existing vehicle to a zero emission vehicle. Five options were given (provided by the council), with opportunity also to provide comment:

- 50% subsidy on licence fee
- Free plate for any zero emission wheelchair accessible vehicle
- Attractive credit or finance package from a local car dealership
- A licensing change preventing new vehicles other than zero emission and further change to prevent current vehicles continuing to be licensed
- No incentives are needed as zero emission vehicles make good economic business sense

For the five responses, four gave a value to all options whereas one only gave three comments, their top preference and the two bottom preferences. These two omitted options were coded as a '6' in score assuming they were not considered relevant. All options apart from the licensing change scored at least one top score.

The attractive finance option was the only option that received two top votes. Scores were totalled to identify the most preferable option and an order (with the lowest score being the best). The most preferred option was the attractive credit or finance option, with two top scores, two second and one fourth.

Joint second were the 50% subsidy and free WAV plate options, with the 50% subsidy option being marginally preferred in that it had no scores putting it at the bottom of the list (the WAV option seemed to be more polarised).

The highest score (and so least favourable) option was people considering such vehicle change was economically sensible, although one person did feel this was the most favoured option. Licensing change was fourth, although its score was only marginally more than the two central scoring options, although as already noted this was the only option that had no-one put it as their preference.

This suggests that significant external input will be needed to enable any significant move of the licensed vehicle fleet to fully zero emission options.

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

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

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

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 and needs to be taken fully in context.

Results from the latest survey, and from all other available reviews of demand for Lancaster are provided below in the table below:

	2019	2016	2013	2010	2007	2005	2000	1996
APD	0.18	0.48	0.12	0.31	0.35	1.32	0.97	0.61
OP	13.73	37.5	10	43.75	3.7	7.55	11	13
GID	3.4	14.3	4.3	32.7	16.7	34.27	26.1	24
Seas	1	1	1	1	1	1	1	1
Peak	0.5	0.5	0.5	0.5	0.5	0.5	1	1
Latent	1.12	1.015	1.04					
ISUD	4.8	131.5	2.7	222	11	171	278	190

The figures in the table above exclude statistics for the private Lancaster station rank from the 2010 survey onwards. The additional restriction on vehicles that can service that location, plus issues arising from train frequency impacts on demand requirements makes providing good service there much more onerous and difficult. Further, any influence from the Council in terms of being able to add extra vehicles to remove unmet demand is simply not possible.

Since 2016, most statistics have seen improvement away from unmet demand being significant. Only latent demand has increased. The next result is that the index of significance of unmet demand is now 4.8, much lower than in 2016 although still higher than in 2013. This means there is no unmet demand in the area that can be counted as significant at this point in time.

For the sake of completeness, the station performance was reviewed using the industry standard ISUD tool. The result was a high index of 1,005 that suggests the unmet demand observed at the station is significant. However, as already discussed this arises from the moderate frequency of trains which provides spikes in demand that are difficult for any fleet to meet. Further discussion occurs in the conclusions. The value in 2016 was much higher, although the sample at the station at that time was lower and the result less robust for the station.

8 Summary, synthesis and study conclusions

This unmet demand survey on behalf of Lancaster City Council has been undertaken following the guidance of the BPG and other recent case history regarding unmet demand and its significance. This chapter draws the key points from each chapter, provides a synthesis drawing these together and then provides conclusions from the database. The following chapter provides specific recommendations based on our understanding of the database of information.

Background and context

This latest unmet demand survey for Lancaster saw the principal information gathered between November and February 2019. Rank observations were undertaken in November, on-street interviews between October and February, and driver views obtained by mid-January 2020. Some key stakeholders were approached prior to the Coronavirus lockdown but others could not be contacted till mid-July although the ongoing issues kept response negligible.

Lancashire remains an area where half the authorities retain their limit on hackney carriage vehicle numbers. Two other authorities held their review at the same time as this survey. The area is seeing slightly more population growth now than at the time of the previous survey.

The area sees most population in the two largest of the four population centres, Lancaster and Morecambe. Local Transport Planning is focussed at the County tier level but also tailored through the Lancaster District Masterplan of 2016. Licensed vehicles are stated to be the third hierarchy of choice after ultra-low emission buses and other buses, with a stated aim to seek ultra-low emission licensed vehicles were possible. In terms of rank provision, there are some local powers allowing limited introduction of new ranks, used in some other areas but not Lancaster.

The Council has limited hackney carriage vehicle numbers since at least 1994 and very regularly reviews this policy by a full independent survey. Three plate issues have occurred in this period, all in favour of wheel chair accessible style vehicles (WAV) (with a stipulation that these vehicles must remain WAV). The area has a history of owners providing further WAV by choice although these can, and often do, revert to saloon as the owners consider necessary.

The plate issues mean hackney carriage vehicle numbers have grown 8% since 1994. Since 2017 private hire numbers have grown 8% but remain much lower than their peak in 2005. Despite this, the hackney carriage fleet is still 31% of the total licensed fleet, high for an area with limited numbers.

The licensed vehicle fleet sees many hackney carriages operating for private hire companies blurring the distinction between the two vehicle styles. This seems to have reduced the overall pressure on private hire vehicle growth.

Driver numbers have been impacted by the general encouragement of drivers to move to dual licences. With a reduction in people holding two separate licences, this had been reducing total numbers of drivers, although this seems to have been reversed in the most recent few years, perhaps allied to the small level of growth of private hire vehicles seen.

Operator numbers remain stable although there was a fall then rise in the last two years.

The hackney carriage WAV proportion has been stable at 14% since 2010 (this level is the same as the national average WAV level for hackney carriages where the fleet is not fully WAV), although there have been some phv WAV introduced. The proportion of the total licensed fleet that is WAV is now 7%, compared to 14% nationally, with Lancaster 177th out of the 292 licensing authorities in terms of total licensed vehicle WAV provision.

Records are available of the results of all surveys including those for 1996, 2000, 2005, 2007, 2010, 2013 and 2016.

There are seven rail stations in the Lancaster area, with Lancaster the busiest, being 282nd highest out of the 2,629 Great Britain stations. It saw over 2 million passenger entries and exits in the latest available data (to end of March 2019). Morecambe is second busiest, but patronage there is just under 200,000. The Lancaster flows have gone up 4% in a similar period to that between the last survey and this one.

Rank observations

An expanded and more robust sample of 453 hours of rank observation were undertaken for this survey, taking advantage of improved technology and methodology. A key factor has been increasing certainty about times lesser used ranks see usage. 73% of the vehicles observed at or near ranks were local hackney carriages. 14% were private hire vehicles and 11% private cars. In terms of total all vehicle movements, 36% were at or near the North Road Diggles location in Lancaster, reflecting its location in the heart of the Lancaster shopping area.

Morecambe ranks saw the worst impact of abuse by private cars, although many of these incidents were when the two ranks in question were not actually in use by hackney carriages.

The Diggles rank saw the highest level of private hire vehicles at or near the rank, but this was partly related to the proximity of the nearby booking office, which had particular impact on the ability of hackney carriages to wait to access the main rank at busy times. The single space provided at this location is very inadequate at busy times, particularly as more people now seem to use this location at night rather than the Bus Station.

For the 2019 observations, the private Lancaster Station rank was busiest, seeing some 40% of the total estimated 6,343 passengers in a typical week. North Road, Diggles was second with 30% followed by the Damside Bus Station with 16%. Market Street Morecambe saw 9% of total passenger demand.

The current level of rank usage is remarkably similar to that three years ago although both Lancaster Station and Common Garden Street have seen growth in both actual numbers of passengers and market share. The Bus station rank has lost numbers and share, and the Morecambe night rank has reduced usage significantly. It is not clear if this is related to its move or to general decline in night life in Morecambe.

Demand rises from Thursday to Friday to Saturday although there does not appear to be as big a disparity in usage between days as in many other locations. The peak flow is in the 01:00 hour in the early hours of Sunday. There was only one hour in the survey period when there was no passenger observed across all ranks.

The North Road, Diggles rank sees extreme and peaky demand when in use. Despite its single space, it is the only rank in the area seeing over 60 passengers in any hour. The private station rank has a very jagged demand profile related to train arrival patterns. Damside Bus Station rank now tends to be daytime only. Market Street Morecambe only operates within the hours the nearby shopping centre is open.

Across the rank observations, just 6% of hours had average passenger delay (APD) in that hour a minute or more, with a further 9% having APD of lower levels. Only 9.4% of passengers actually experienced a wait of a minute or more. Some occurrences of unmet demand related more to 'thin demand' (passengers waiting when rank demand was generally low) than to any need for more vehicles. 59% of delays that were a minute or more were at the private Station rank.

Review of the delay profile did not identify any systematic period where people had to wait. Few delays were associated with the higher passenger flow hours, suggesting the trade were willing and able to meet increased demand when needed.

Review of plates active found 54% of the fleet were observed on the Saturday of the survey. Most plates were around in the period over midnight (39% of the entire fleet were seen). Many seemed to focus on particular ranks or areas.

Four people were observed accessing hackney carriages at ranks in wheel chairs, three at the Station and one at Market Street, Morecambe. This was supplemented by a further 44 who were assisted into vehicles due to apparent disabilities.

On street public views

A representative sample of local people were interviewed about their views regarding local licensed vehicles. Nearly all those interviewed said they had used a local licensed vehicle in the last three months, much higher than in previous surveys. They provided a high estimate of licensed vehicle usage per person per month, 4 for Lancaster and 5.9 for Morecambe. When focussed on use of hackney carriages, the values were 2.3 for Lancaster and 4.8 for Morecambe implying 58% of licensed vehicle trips in Lancaster and 82% in Morecambe are actually using hackney carriages.

This is supported by none in Morecambe and just 15% in Lancaster saying they could not remember the last time they used a hackney carriage. In terms of how people said they obtained licensed vehicles, 41% in Lancaster and 37% in Morecambe said from ranks, with a further 2% hailing in Lancaster (but none in Morecambe). App usage was 4% in Lancaster but zero in Morecambe.

The number of quoted private hire companies used was just four, with two companies dominant in each of the two areas. Apps used were local.

67% in Lancaster and 61% in Morecambe said they knew the difference between hackney carriage and private hire vehicles with the main quoted difference being that you could hail a hackney carriage. The second highest quoted difference was that private hires had to be pre-booked. Few quoted physical differences to the vehicle appearance.

Respondents displayed a good knowledge of ranks with 54% of those named also being used. However, people did use several names for most locations. The Bus Station rank was most known about. The Promenade and Arndale ranks were next most quoted, followed by Lancaster Station.

People quoted very good experience of the service provided by licensed vehicles in Lancaster. On the contrary, more use would arise principally from better vehicles and more hackney carriages available by phone. Two people said more WAV, ramps and better wheel chair provision was needed with others encouraging use of CCTV.

The question about need for an adapted vehicle identified relatively high need in the area, mainly for WAV style vehicles. However, most said they would book a WAV if needed. Around a third in each area said they felt those with disabilities got a good service from hackney carriage vehicles and drivers. Slightly less, 30%, felt they did not. 12% in Lancaster and 20% in Morecambe of those responding said there were not enough WAV available.

Latent demand for council ranks was estimated at 8%, with that for hailing being 2% Morecambe and 6% Lancaster. The estimated rank and hail latent demand was estimated at 1.12 for council ranks and 1.13 for all ranks including the private station rank.

Over three quarters felt there were enough hackney carriages available overnight. Almost all felt safe in the daytime with a small decrease in that level at night.

In terms of fares, half of Lancaster respondents felt they were fair whilst 71% of Morecambe felt thus.

35% of Lancaster and 22% of Morecambe respondents would use an electric powered vehicle with 9% and 2% more respectively as long as this did not imply increased costs.

With reference to card usage to pay, 45% in Lancaster and 55% in Morecambe would still pay cash, with 41% and 40% happy to use as long as it had no implication on costs, with 13% and 4% using for every journey.

Key stakeholder views

No views were provided apart from one long-term consultee who said they had changed their travel ability by purchasing a powered wheel chair to enable more local movement, reducing their need for a WAV to a regular once per week plus any links to rail trips. They also said they had improved their experience by building a link with one local operator.

Trade views

Just five drivers responded to the all-driver survey. One said they avoided times they thought passengers would be disruptive. On average 38 hours and six days were worked. 80% owned their own vehicle with 40% saying someone else also drove the vehicle they used. Despite the low numbers, the response in terms of locations covered was comprehensive. 60% felt the limit should be retained.

One person reported high levels of wheel chair usage requests whilst the others received none. The respondents were equally split between the fare scale being about right and needing to be increased.

With reference to how people could be encouraged to switch to fully zero emission style vehicles the most popular response was for attractive finance, suggesting significant external input will be needed to achieve any significant move at this time.

Formal evaluation of significance of unmet demand

The 2019 evaluation using the industry standard index of significance of unmet demand (ISUD) provided a value of 4.8, a long way from the level of 80 that is counted to show unmet demand to be significant. The value is also reduced from the previous survey, with all values apart from the latent demand level having reduced.

However, evaluation of the station rank, and of all ranks including that location, suggests much poorer service occurs at that location. As already noted, this results both from the nature of train arrivals as well as from the further limitation on numbers of vehicles able to service this site.

Synthesis

People continue to make reasonable usage of licensed vehicles in the Lancaster licensing area. Usage in 2019 was very similar at ranks in total to that in 2016, albeit with some change in the ranks used. The key gain has been at the private station rank, which has probably made the issue with the extra restriction on vehicle numbers there that the Authority cannot control more significant. There also appears to have been a shift to usage of the very small North Street rank at night rather than the bus station location.

This location works very well given the single space capacity, although the ability of vehicles to wait to fill the space of a vehicle moving off is critical and seems to work well at present even though there are only three extra spaces only formally available from 22:00 onwards.

The Morecambe night rank has significantly reduced in usage, presumably related to change in night activity given that the rank moved before the last survey (and did not seem to reduce usage there).

The fleet of hackney carriages respond well to increased demand, with a significant rise in levels of both vehicles active and their activity level into the early hours of Sunday. The fleet also seems to be able to react to changes in demand well.

Specific review of examples of unmet demand suggest small proportions of people experience arriving at a rank to find no vehicles waiting to be hired.

Overall levels of service to passengers have improved marginally, particularly at the Council provided rank locations. People remain very happy with the overall service provided. People understand the difference between the two vehicle types, but mainly on operational differences not physical ones. The top definition was that you could hail a hackney carriage followed by that you had to pre-book a private hire.

Considering the national rail statistics, the 2,122,814 total entries and exits for Lancaster suggests around 21,228 passengers leave the station in an average week. On this basis, the estimated weekly flow from the rank suggests 12% of these leave by hackney carriage from the rank. In 2016 the similar value was 8%.

Growth in station passengers of some 4% has been surpassed by a rise in estimated hackney carriage passengers there of some 50% (explaining the increase in proportion leaving by hackney carriage).

Taking the estimated weekly passenger departures from ranks, there are about 333,000 passenger trips per year in the Lancaster licensing area from ranks. Using the public attitude results suggests about 854,000 passenger journeys would be made by people in licensed vehicles in the Lancaster area, of which 39% therefore are from the ranks directly, a relatively high proportion also reflected in what people told us.

However, the 6,343 estimated passengers per week from ranks, when divided by the overall occupancy level and compared to the 108 vehicles available to meet this demand suggests just 4.9 paid journeys per vehicle per day, a level that explains why many vehicles need to supplement their income by working with private hire companies.

Although apps have only received small levels of usage, their existence, plus the strength of the overall operation (including private hire) appears to have kept national incursions at bay. However, this may partly be due to the relatively low levels of overall demand on offer.

Conclusions

Our independent collation of evidence of demand for hackney carriages in the Lancaster licensing area found a very healthy picture of usage and service provided. This is encouraging.

The overall evidence is that the current limit on hackney carriage vehicle licences is providing stability and public benefit to those using licensed vehicles in the area.

9 Recommendations

On the basis of the evidence gathered in this unmet demand survey for Lancaster, 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 the point in time this survey was undertaken in the Lancaster licensing area. The committee is therefore able to retain the current limit, and do so at its present level. There is specifically no need to add any further licences.

Appendix 1 – Industry statistics

Lancaster City

DfT data states limit began in at least 1994

	hcv	phv	lv total	hcd	phd	dd	total d		Ops	% hcv WAV	% phv WAV
1994D	95		95	600			600	**1994D**			
1997D	100	130	230	375	350		725	**1997D**		18	
1999D	100	170	270	325	425		750	**1999D**	60	14	
2001D	105	200	305	300	400		700	**2001D**	30	4	
2004D	105	200	305	300	400		700	**2004D**	30	4	
2005D	104	286	390	309	482		791	**2005D**	54	16	
2007D	104	286	390	309	482		791	**2007D**	54	16	
2009D	109	280	389	338	512	0	850	**2009D**	68	19	
2010N	109	257	366	*279*	*426*	*45*	*750*	**2010N**	*64*	14	5
2011D	109	280	389	220	340	89	649	**2011D**	59	14	*3*
2012N	109	229	338	*203*	*305*	*132*	640	**2012C**	*55*	14	
2013C	108	220	328	185	270	175	630	**2013D**	51	14	
2014N	108	221	329	*169*	*247*	*187*	602	**2014N**	*51*	14	
2015D	108	238	346	152	223	199	574	**2015D**	51	14	
2016C	108	223	331	115	170	279	564	**2016C**	53	14	
2017D	108	220	328	93	131	329	553	**2017D**	53	14	1
2018D	108	220	328	53	79	383	515	**2018D**	56	14	4
2019D	108	229	337	40	53	427	520	**2019D**	47	14	4
2019C	108	238	346	39	54	436	529	**2019C**	54	14	4

Appendix 2 – List of ranks

Rank / operating hours	Spaces (approx)	Comments
Lancaster City		
24-hour ranks		
Damside Bus Station	11	Back in use as main rank
Penny Street, KFC	4	Now little used
Common Garden Street	2	
North Road, Diggles	1	Three additional spaces at night (see below)
Night only ranks		
North Road	11	Operates 2200 to 0400. Main night club now gone, limited use
Gage Street	3	Operates 2000 – 0600
North Road, Diggles	3	Operates 2200 - 0600
Penny Street	5	Operates 2200 - 0600
Brock Street	5	Operates 1800 - 0800
Sun Hotel	2	New rank operating 1800 to 0600
Lower St, Leonardsgate Car Park	8	Operates 0100 – 0330 1 Sept to 30 June
Non-central rank locations (Radio)		
Ash Grove	1	All to meet condition that vehicles should proceed to rank to wait
Torrisholme road	1	
Coulston Road	1	
Hala Square	1	
St Martin's Road	1	
Green Lane Halton Road	1	
Quernmore Road	1	
Private Ranks		
Lancaster railway station, County side	6	Single space near exit with further spaces within forecourt. Supplementary payment to Avanti Trains via an agency
Lancaster University, Bowland Ave	3	
Lancaster University, South West Drive	2	
Morecambe		
24 hour ranks		
Market Street, Arndale and feeder	8+4	Main daytime rank directly outside shopping centre and supermarket
Tunstall Street, rear of Arndale shopping centre	3	New during 2015
Morecambe rail station car park	5	Purpose built area on council land

Broadway	4	
Marine Road East / Elm Grove	2	
Marine Rd W / Lancashire St	3	See below for night extension
Marine Road opp Midland Hotel	2	
Marine Road E opp Town Hall	4	
Night time ranks		
Marine Road West / Lancashire Street	2	2000 to 0600 additional spaces
Tunstall St	2	1800 to 0800 additional spaces
Marine Road Central opposite War Memorial	5	2000 to 0600
Victoria Street	2	2200 to 0400
Marine Road West near Aldi	6	2000 to 0600
Marine Road Central (Costa)	5	1800 to 0800

Appendix 3 – Timetable of rank observations

Please see separate document

Appendix 4 – Detailed rank observation results

Please see separate document

Appendix 5 – Detailed on street interview results

Please see separate document

Appendix 6 List of Stakeholders consulted

Key consultee	Response
Supermarkets	
Sainsbury's Cable Street	N
Booths Hala Road	N
Asda, Ovangle Rd	N
Booths, Carnforth	N
Sainsbury's Morecambe	N
Morrison Morecambe	N
Asda Morecambe	N
Co-op Heysham	N
Arndale Centre Morecambe	N
Hotels	
The Sun, Church St	N
Crows Hotel, King St	N
Toll House, Penny St Bridge	N
Royal King Arms	N
Travelodge Lancaster Central	N
Restaurants / Cafes	
Marco's North Road Lancaster	N
Mollys' Lancaster	N
The Gatehouse	N
Half Moon Bay Café, Heysham	N
The Blue Mountain, Morecambe	N
Miaitalia, Carnforth	N
Entertainment	
The Dukes	N
Grand Theatre	N
Vue Cinema	N
Public Houses	
The Eric Bartholmew, Morecambe	N
The Old Hall, Heysham	N
The Eagles Head, Carnforth	N
Merchants 1688 Lancaster	N
The Three Mariners	N
The White Cross	N
Ye Olde John O'Gaunt	N
	N
Night Clubs	
Hustle	N
Revolution Bar	N
Hustle	N
Dalton Rooms	N

Other key stakeholder groups	
Private individual, wheelchair user	Y

Rail year (ends March in last year noted)	Entries / exits	Growth / decline
Lancaster (282nd) (Virgin Trains West Coast, now Avanti)		

1997 / 1998	1,051,133	n/a
1998 / 1999	1,098,475	+5%
1999 / 2000	1,154,174	+5%
2000 / 2001	1,131,960	-2%
2001 / 2002	1,150,536	+2%
2002 / 2003	1,115,448	-3%
2003 / 2004	Not collected	
2004 / 2005	1,270,227	+14%
2005 / 2006	1,317,299	+4%
2006 / 2007	1,395,832	+6%
2007 /2008	1,498,353	+7%
2008 / 2009	1,559,994	+%
2009 / 2010	1,656,070	+6%
2010 / 2011	1,787,698	+8%
2011 / 2012	1,835,462	+3%
2012 / 2013	1,850,772	+1%
2013 / 2014	1,915,446	+3%
2014 / 2015	2,004,122	+5%
2015 / 2016	2,033,538	+1%
2016 / 2017	2,146,796	+6%
2017 / 2018	2,142,868	-0.2%
2018 / 2019	2,122,814	-1%
Growth since last survey (2015/6 to 2018/9) (and from 97/98)		+4% (+101%)

Rail year (ends March in last year noted)	Entries / exits	Growth / decline
Morecambe (1,418th) Northern		
1997 / 1998	195,573	n/a
1998 / 1999	202,754	+4%
1999 / 2000	202,239	-0.3%
2000 / 2001	194,329	-4%
2001 / 2002	185,476	-5%
2002 / 2003	167,592	-10%
2003 / 2004	Not collected	
2004 / 2005	195,316	+17%
2005 / 2006	185,405	-5%
2006 / 2007	188,789	+2%
2007 /2008	205,495	+9%
2008 / 2009	204,100	+0.3%
2009 / 2010	204,858	+0.3
2010 / 2011	221,142	+8%
2011 / 2012	220,296	-0.4%
2012 / 2013	209,108	-5%
2013 / 2014	217,280	+4%
2014 / 2015	245,548	+13%
2015 / 2016	235,198	-4% (+20% overall)
2016 / 2017	237,976	+1%
2017 / 2018	225,632	-5%
2018 / 2019	195,956	-13%
Growth since last survey (2015/6 to 2018/9) (and from 97/98)		-17% (+0.2%)

Rail year (ends March in last year noted)	Entries / exits	Growth / decline
Carnforth (1,497th) Trans Pennine Express		
1997 / 1998	110,164	n/a
1998 / 1999	107,814	-2%
1999 / 2000	112,957	+5%
2000 / 2001	123,624	+9%
2001 / 2002	98,461	-20%
2002 / 2003	105,046	+7%
2003 / 2004	Not collected	
2004 / 2005	149,649	+42%
2005 / 2006	157,240	+5%
2006 / 2007	150,824	-4%
2007 /2008	174,644	+16%
2008 / 2009	176,918	+1%
2009 / 2010	179,602	+2%
2010 / 2011	196,972	+10%
2011 / 2012	191,306	-3%
2012 / 2013	196,470	+3%
2013 / 2014	206,590	+5%
2014 / 2015	204,196	-1%
2015 / 2016	206,572	+1% (88% overall)
2016 / 2017	198,270	-4%
2017 / 2018	175,384	-12%
2018 / 2019	166,556	-19%
Growth since last survey (2015/6 to 2018/9) (and from 97/98)		-19% (+51%)

Rail year (ends March in last year noted)	Entries / exits	Growth / decline
Bare Lane (1,583rd) Northern		
1997 / 1998	118,851	n/a
1998 / 1999	125,886	+6%
1999 / 2000	123,624	-2%
2000 / 2001	125,093	+1%
2001 / 2002	113,211	-10%
2002 / 2003	101,181	-11%
2003 / 2004	Not collected	
2004 / 2005	116,597	+15%
2005 / 2006	117,576	+1%
2006 / 2007	117,264	-0.3%
2007 /2008	126,706	+8%
2008 / 2009	132,652	+5%
2009 / 2010	131,752	-1%
2010 / 2011	137,856	+5%
2011 / 2012	141,200	+2%
2012 / 2013	138,054	-2%
2013 / 2014	167,726	+21%
2014 / 2015	183,830	+10%
2015 / 2016	188,120	+2%
2016 / 2017	179,506	-5%
2017 / 2018	155,096	-14%
2018 / 2019	137,840	-11%
Growth since last survey (2015/6 to 2018/9) (and from 97/98)		-27%% (+16%)

Rail year (ends March in last year noted)	Entries / exits	Growth / decline
Silverdale (1,994th) Northern		
1997 / 1998	38,146	n/a
1998 / 1999	37,451	-2%
1999 / 2000	38,927	+4%
2000 / 2001	34,301	-12%
2001 / 2002	30,676	-11%
2002 / 2003	27,441	-11%
2003 / 2004	Not collected	
2004 / 2005	34,419	+25%
2005 / 2006	33,520	-3%
2006 / 2007	36,082	+8%
2007 /2008	42,268	+17%
2008 / 2009	45,080	+7%
2009 / 2010	45,126	+0.1%
2010 / 2011	47,024	+4%
2011 / 2012	44,566	-5%
2012 / 2013	45,818	+3%
2013 / 2014	50,404	+10%
2014 / 2015	59,352	+18%
2015 / 2016	54,872	-8% (+44% overall)
2016 / 2017	55,892	+2%
2017 / 2018	53,218	-5%
2018 / 2019	47,978	-10%
Growth since last survey (2015/6 to 2018/9) (and from 97/98)		-13% (+26%)

Rail year (ends March in last year noted)	Entries / exits	Growth / decline
Heysham Port (2,353rd) Northern		
1997 / 1998	16,869	n/a
1998 / 1999	10,070	-40%
1999 / 2000	6,924	-31%
2000 / 2001	9,387	+36%
2001 / 2002	7,682	-19%
2002 / 2003	6,788	-12%
2003 / 2004	Not collected	
2004 / 2005	5,696	-16%
2005 / 2006	5,251	-8%
2006 / 2007	6,924	+32%
2007 /2008	7,178	+4%
2008 / 2009	7,606	+6%
2009 / 2010	7,752	+2%
2010 / 2011	8,858	+14%
2011 / 2012	7,682	-13%
2012 / 2013	8,310	+8%
2013 / 2014	9,064	+9%
2014 / 2015	9,608	+6%
2015 / 2016	9,128	-5% (-46% overall)
2016 / 2017	10,158	+11%
2017 / 2018	9,670	-5%
2018 / 2019	7,698	-20%
Growth since last survey (2015/6 to 2018/9) (and from 97/98)		-16% (-54%)

Rail year (ends March in last year noted)	Entries / exits	Growth / decline
Wennington (2408th) Northern		
1997 / 1998	2,321	n/a
1998 / 1999	2,461	+6%
1999 / 2000	2,073	-16%
2000 / 2001	2,306	+11%
2001 / 2002	1,811	-21%
2002 / 2003	2,005	+11%
2003 / 2004	Not collected	
2004 / 2005	2,900	+45%
2005 / 2006	2,697	-7%
2006 / 2007	2,848	+6%
2007 /2008	3,111	+9%
2008 / 2009	3,040	-2%
2009 / 2010	3,222	+6%
2010 / 2011	3,696	+15%
2011 / 2012	3,340	-10%
2012 / 2013	2,948	-12%
2013 / 2014	3,378	+15%
2014 / 2015	3,492	+3%
2015 / 2016	3,956	+13%
2016 / 2017	4,394	+11%
2017 / 2018	4,384	-0.2%
2018 / 2019	4,768	+9%
Growth since last survey (2015/6 to 2018/9) (and from 97/98)		+21% (+105%)