



Taxi Unmet Demand Survey

**Perth
December 2024**

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Executive Summary

LVSA were commissioned by Perth & Kinross Council to undertake a taxi unmet demand survey. The study is intended to fulfil the requirements set out in the Civic Government (Scotland) Act 1982 (CGSA) and Best Practice Guidance (BPG) issued by the Scottish Government and relevant case history in regard to unmet demand.

Within the Council licensing area, the council maintains a limit regarding the number of taxis which may be licensed in Perth. The current limit is set at 80 taxi vehicles in Perth. There is no limit to the number of taxis which may be licensed in other areas around Perth and Kinross.

Data has been collected through consultation with stakeholders, the trade and members of the public. In addition, observations of activity at taxi ranks were undertaken to record volumes of taxis and passengers using each rank and whether any passengers had to wait for taxis to arrive at the ranks.

The 2024 survey is the latest in a regular series of surveys commissioned by the Council. The last two surveys were conducted in 2021 and 2017.

Taxi demand in 2021 was heavily influenced by the aftermath of the Covid-19 pandemic. Since 2021, the level of passenger demand had increased.

The total volume of observed hires of taxis from the ranks in Perth was lower in 2024 than that observed in 2017. However, despite the reduced volume of hires through the ranks, the number of people who had to wait for a taxi to arrive at the ranks in 2024 was significantly higher in 2024, than in 2017.

There has also been an increase in the number of taxis in the fleet in Perth in 2024, compared with 2017.

Year	Total number of taxi hires from ranks	Total number of passengers waiting at the ranks.	Average waiting time for passengers who had to wait for a taxi	Number of taxis in the fleet in Perth
2017	1,959	159	2 min 08 sec	75
2024	943	331	5 min 30 sec	80

The purpose of this survey is to identify whether there is sufficient availability of taxis at the ranks to meet the level of demand.

The result of the survey is a clear indication that there is not sufficient availability of taxis at the taxi ranks, to meet demand. **There is significant unmet demand for taxis.**

The number of hires obtained from ranks has fallen dramatically since 2017. The hires observed at ranks in 2024 were around 48% of the level observed in 2017. The number of taxis in the fleet has increased by 6.7%. Despite more taxis and less hires taking place at ranks, the number of people who had to wait for taxis to arrive at the ranks had increased by 108%.

Clearly, the way in which taxis operate has changed. The way in which people hire licensed vehicles has also changed, with more people pre-booking hires for immediate travel.

The situation in 2024, compared with 2017, was that use of the ranks has reduced, passenger waiting has increased and the number of taxis in the fleet has increased. However, the increase in the number of taxis has not addressed the increased passenger waiting and hence the level of unmet demand is significant.

Options open to the Council to address the shortage of supply are limited. A change in fares could be considered, however the level of taxi fares and structure of the taxi fares table are outside the remit of this survey.

There remains only the option to increase the number of licences, either by increasing the cap on licences, or by removing the cap altogether.

If the cap were to be increased, it would require a large increase to result in the changes needed to address the level of unmet demand observed.

It is recommended that the cap on licence numbers is increased by 24 licences. The issue of licences should follow current policies for additional taxi licences.

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1 General introduction and background

Perth & Kinross Council is responsible for the licensing of Taxi and Private Hire Cars operating within the Council area. It retains a limit on the number of Taxi vehicles licensed.

This study is intended to fulfil the requirements set out in the Civic Government (Scotland) Act 1982 (CGSA) and Best Practice Guidance (BPG) issued by the Scottish Government.

Current taxi, private hire and operator licensing is undertaken within the legal frameworks set by the Civic Government (Scotland) Act 1982 (CGSA).

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) has become established as an industry standard tool to be used for this purpose.

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

In conclusion, the present legislation in Scotland 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 have jurisdiction over vehicles carrying eight or fewer passengers.

These are split between taxis 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 car without such a properly made booking, they are generally not insured for their journey.

2 Local background and context

The authority has a current population of 153,000, based on Scottish Government statistics.

All licensing authorities have full powers over licensing the vehicles, drivers and operators serving people within their area. Perth & Kinross Council has chosen to utilize its power to limit Taxi vehicle numbers in Perth. Throughout other areas within Perth and Kinross, there is no limit to the number of taxis.

Perth & Kinross Council undertakes regular review of its policy to limit Taxi vehicle numbers in line with the BPG.

Table 1, Table 2 and Figure 1 illustrate the fleet composition for the licensing authorities in Scotland. The authorities are arranged in order of increasing licensed vehicles per 1,000 population and increasing proportion of licensed vehicle drivers per licensed vehicle.

Licensed Vehicle numbers and proportions are largely based on 2023 figures and Mid 2023 population data.

Table 1 - Comparison of Licenced Vehicles per 1,000 population

Licensing area	pop 2021	Taxi vehicles	Private hire cars	Total vehicles	Wheelchair accessible taxis	Wheelchair accessible private hire cars	Taxis per 1,000 population	Private Hire Cars per 1,000 population	Total licensed vehicles per 1,000 population
Aberdeen City	227,430	593	225	818	335	0	2.6	1.0	3.6
Aberdeenshire	262,690	335	390	725	28	39	1.3	1.5	2.8
Angus	116,120	86	64	150	5	3	0.7	0.6	1.3
Argyll and Bute	86,220	173	53	226	10	1	2.0	0.6	2.6
Clackmannanshire	51,540	46	42	88	5	1	0.9	0.8	1.7
Dumfries and Galloway	148,790	211	50	261	3	0	1.4	0.3	1.8
Dundee City	147,720	298	169	467	186	0	2.0	1.1	3.2
East Ayrshire	122,020	125	104	229	24	3	1.0	0.9	1.9
East Dunbartonshire	108,900	207	275	482	41	2	1.9	2.5	4.4
East Lothian	109,580	119	112	231	119	[unavailable]	1.1	1.0	2.1
East Renfrewshire	96,580	40	406	446	1	3	0.4	4.2	4.6
City of Edinburgh	526,470	1164	2552	3716	1164	10	2.2	4.8	7.1
Na h-Eileanan Siar	26,640	83	18	101	2	3	3.1	0.7	3.8
Falkirk	160,700	396	92	488	56	5	2.5	0.6	3.0
Fife	374,730	481	320	801	16	50	1.3	0.9	2.1
Glasgow City	635,130	1351	3276	4627	1351	25	2.1	5.2	7.3
Highland	238,060	473	228	701	9	12	2.0	1.0	2.9
Inverclyde	76,700	245	42	287	20	0	3.2	0.5	3.7
Midlothian	94,680	36	124	160	36	0	0.4	1.3	1.7
Moray	96,410	125	17	142	7	16	1.3	0.2	1.5
North Ayrshire	134,220	235	46	281	48	4	1.8	0.3	2.1
North Lanarkshire	341,400	435	1025	1460	167	0	1.3	3.0	4.3
Orkney Islands	22,540	36	17	53	1	2	1.6	0.8	2.4
Perth and Kinross	153,810	103	231	334	24	41	0.7	1.5	2.2
Renfrewshire	179,940	224	686	910	220	21	1.2	3.8	5.1
Scottish Borders	116,020	161	60	221	14	14	1.4	0.5	1.9
Shetland Islands	22,940	61	64	125	3	3	2.7	2.8	5.4
South Ayrshire	112,450	92	161	253	92	0	0.8	1.4	2.2
South Lanarkshire	322,630	355	1585	1940	20	29	1.1	4.9	6.0
Stirling	93,470	180	105	285	15	9	1.9	1.1	3.0
West Dunbartonshire	87,790	326	85	411	161	8	3.7	1.0	4.7
West Lothian	185,580	62	437	499	62	74	0.3	2.4	2.7
Total	5,479,900	8,857	13,061	21,918	4,245	378	1.6	2.4	4.0

Note: Data for Aberdeen City, Argyll and Bute, Clackmannanshire, East Lothian, Na h-Eileanan Siar and Inverclyde, for 2023 was not available. For these areas, the latest data (2022) was used, except for Clackmannanshire, which used the latest available data from 2021. No data for 2024 has yet been published.

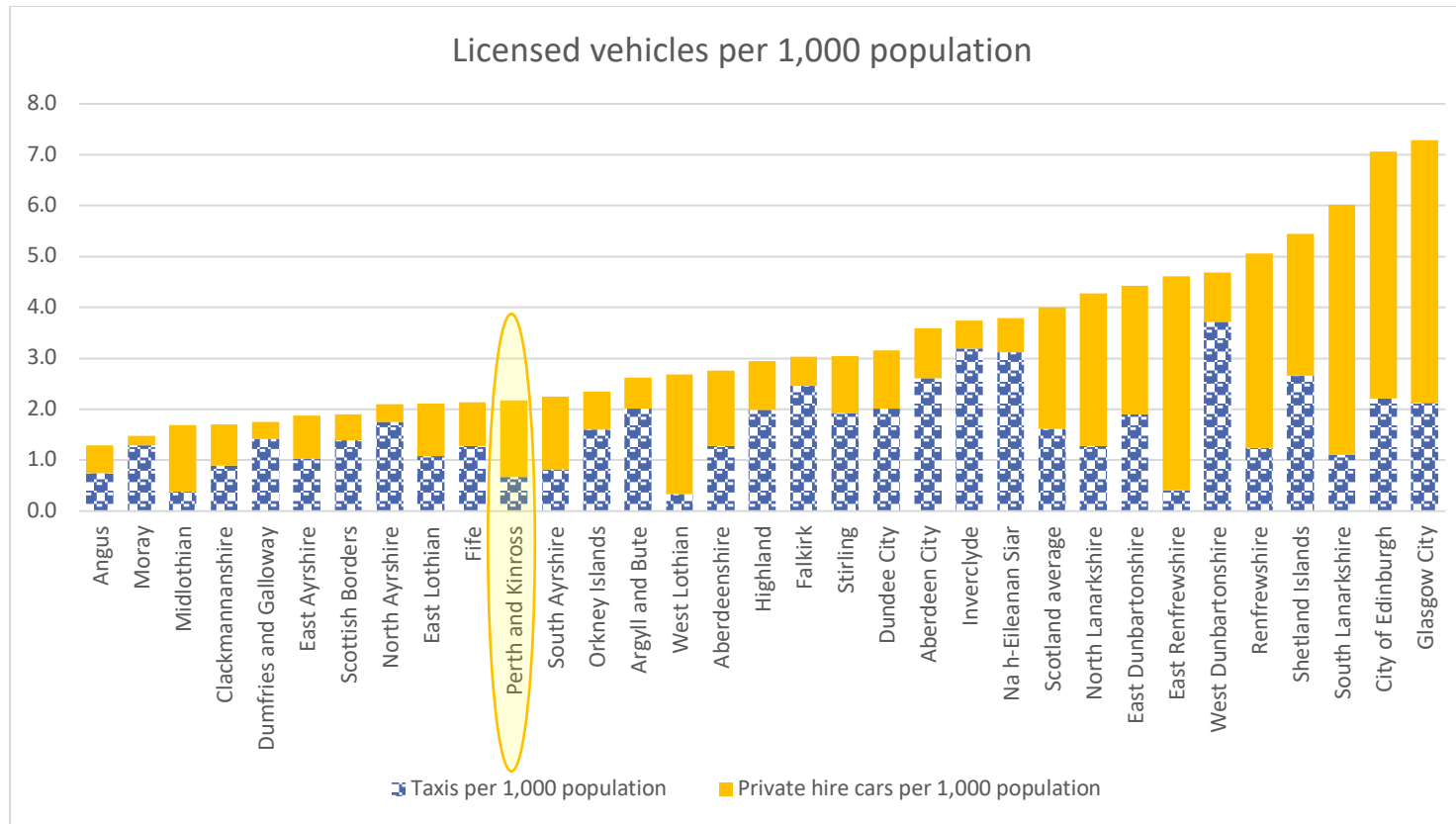


Figure 1 - Comparison of Licensed Vehicles per 1,000 population

Whilst the comparison of licensed vehicles against population provides a useful metric, it should be noted that population size is not the only driver of demand for licensed vehicles. Other aspects such as visitor numbers, car ownership/availability, levels of business travel, the presence of large rail termini and airports can have a significant influence on the demand for licensed vehicles. For example, Renfrewshire has a large proportion of licensed vehicles per head of population. A significant influence on the demand for licensed vehicles is the fact that Glasgow Airport lies within the boundary of Renfrewshire and many of the licensed vehicles servicing the airport are licensed by Renfrewshire Council. Glasgow and Edinburgh also have relatively high levels of licensed vehicle provision per head of population. Much of the demand is driven by the level of non resident users in each city. Tourist and leisure visitors, business visitors and passengers in transit from the airports and major rail stations all contribute to demand, in addition to demand generated by residents in each Council area.

Both taxis and private hire cars are often associated by the public as vehicles which are commonly hired by any member of the public for immediate travel, often for relatively short local trips. However licensed vehicles also fulfil other functions such as limousine services, airport transfers, tourism services, contract hires and corporate travel. As such, in some licensing areas, such vehicles rarely or never are used for immediate hires by the general public. Larger cities tend to have higher levels of demand for such services and hence a greater number of licensed vehicles in cities may be used for such non-immediate hire purposes, compared with smaller and more rural areas.

In addition to licensed vehicle numbers, it is prudent to consider the number of drivers licensed to drive these vehicles. In Perth & Kinross, taxi drivers and private hire car drivers may drive both taxis and private hire cars. Some licensing authorities limit private hire car drivers to only driving private hire cars.

Higher ratios of licensed vehicle drivers to licensed vehicles may imply more intensive use of each vehicle. Consequently, the capacity of the fleet is enhanced with more extensive use of vehicles for multiple shifts. Fleets with a higher ratio of drivers to vehicles tend to be more capable of catering for larger fluctuations in demand, such as increased demand on Friday and Saturday nights. Table 2 provides the ratio of licensed vehicle drivers to licensed vehicles, ranked by the ratio of all drivers to all licensed vehicles, based on 2020 Scottish Government data. The ratio of all licensed vehicle drivers to all licensed vehicles for Perth & Kinross was 1.74. This is higher than the Scottish average.

Table 2 - Ratio of licensed drivers to licensed vehicles

Licensing authority	Licensed vehicle driver to licensed vehicle ratio
East Dunbartonshire	1.14
Falkirk	1.14
Glasgow City	1.22
South Lanarkshire	1.23
Stirling	1.24
Clackmannanshire	1.28
East Renfrewshire	1.29
North Lanarkshire	1.29
Scottish Borders	1.29
Aberdeen City	1.29
East Lothian	1.29
Highland	1.33
Renfrewshire	1.40
Na h-Eileanan Siar	1.42
Scottish average	1.44
City of Edinburgh	1.47
Dumfries and Galloway	1.47
West Lothian	1.54
Orkney Islands	1.60
East Ayrshire	1.66
Inverclyde	1.66
Angus	1.67
Midlothian	1.68
North Ayrshire	1.69
Argyll and Bute	1.69
Perth and Kinross	1.79
Aberdeenshire	1.87
Dundee City	1.92
South Ayrshire	1.94
West Dunbartonshire	1.98
Fife	2.09
Shetland Islands	2.28
Moray	2.70

Fares comparison

Private Hire and Taxi Monthly magazine publish monthly league tables of the metred fares for taxis in Licensing Authorities in the UK. The Tariff 1 fares for a two mile journey (distance costs only) are compared and ranked. The lower the ranking (number), the more expensive the journey, compared with other authorities. The December 2024 table indicated that the fares in Perth & Kinross were ranked 291 out of 362 authorities listed. This indicates that taxis in Perth & Kinross are cheaper than for most authorities. A comparison of the fares ranking of Scottish authorities is presented in Table 3

Table 3 - Comparison of Taxi fares rankings in Scottish authorities

Local Authority	Rank
Aberdeen City	242
Aberdeenshire	180
Angus	236
Argyll & Bute	169
Clackmannan	31
Clydebank	201
Dumbarton & Vale of Leven	212
Dumfries & Galloway	256
Dundee	92
East Ayrshire	105
East Dunbartonshire	239
East Lothian	35
East Renfrew	132
Edinburgh	13
Falkirk	290
Fife	106
Glasgow	16
Highland	174
Inverclyde	191
Mid Lothian	20
Moray	150
North Ayrshire	274
North Lanarkshire	315
Orkney	260
Perth & Kinross	205
Renfrewshire	181
Scottish Borders	301
Shetland	102
South Ayrshire	138
South Lanarkshire (Cambuslang / Rutherglen)	224
South Lanarkshire (Clydesdale)	299
South Lanarkshire (East Kilbride)	250
South Lanarkshire (Hamilton)	293
Stirling	264
West Lothian	229
Western Isles	186

3 Patent demand measurement (rank surveys)

Perth taxi ranks

Within Perth & Kinross, Perth is defined as a separate taxi licensing zone, with a limit of 80 taxis licensed within the zone.

Five taxi rank locations in Perth were surveyed from the morning of Thursday 20th June 2024 to the morning of Sunday 23rd of June 2024

These locations were:

- 1 Murray Street
- 2 Railway Station
- 3 South Street (outside Tesco)
- 4 South Street (outside Loft)
- 5 Pomarium Street, near the bus station

Rank surveys

Surveys were undertaken using video cameras which recorded activity at the ranks from Thursday to the following Sunday morning. The video footage of each rank was processed to assess the level of usage of each rank and to record any incidences of passenger waiting. Footage was recorded from 7:00 on Thursday 20th June 2024 to 7:00 on Sunday 23rd June 2024.

Overview of observations

During the course of the survey, some 943 taxis were observed departing the ranks with passengers. This total was more than the 774 vehicles observed departing the ranks with passengers during the 2021 survey, However, the observed total was less than the 1,959 vehicles which were observed departing the ranks, with passengers during the 2017 survey.

The number of hires observed during the 2024 survey equates to approximately 12 hires per vehicle (with a fleet size of 80) over the three days of observation.

The proportion of taxis which left the rank empty was approximately 33%. This is higher than the 24% proportion observed during the 2017 survey, but lower than the 40% observed during the 2021 survey.

Taxis normally leave ranks empty for a variety of reasons. These include moving to another rank, having waited unsuccessfully for a hire, or leaving the rank to service a booking. Many of the taxis which departed the railway station rank empty, departed after a train had arrived and not all waiting taxis were hired. Rather than wait for the next train, it was common for remaining taxis to leave the rank.

Most of the taxis departing the rank empty, were from the Murray Street rank. It is assumed that a significant proportion of those departures were in response to a booking, rather than moving to another rank. Generally, these departures occurred when other ranks were not active, so were unlikely to attract taxis from the Murray Street rank. This assumption was corroborated by feedback from the trade.

During the course of the surveys, no passengers were observed, who used a wheelchair.

Many incidences of passenger waiting were observed. Out of 1,451 passengers observed using Taxis, 331 (23%) had to wait for a taxi. It should be noted that not all passengers observed waiting for a taxi, actually boarded a taxi. 40 intending passengers left the ranks in frustration, having waited at the rank for a taxi to arrive. For comparison, during the 2021 survey, 159 passengers (6%) of 2,730 passengers were observed waiting for a taxi to arrive at a rank.

The maximum wait time observed during the 2024 survey was 39 minutes 30 seconds.

The average waiting time for all passengers who had to wait for a Taxi, during the 2024 survey, was 5 minutes and 30 seconds. This was lower than the average wait times observed during the 2021 survey, which was 12 minutes 31 seconds. The average waiting time for all passengers who had to wait for a taxi during the 2024 survey was significantly longer than the observed average wait time during the 2017 survey, of 2 minutes and 8 seconds.

During the 2024 survey, the average waiting time for all passengers, including those who didn't have to wait, 1 minute 14 seconds. This compares with the 2021 waiting time of 3 minutes 25 seconds. During the 2017 survey, the average wait time was significantly lower, at 7 seconds.

Total volumes of passengers and taxis through each of the ranks is summarised in the following tables.

Thursday - Friday						
Rank location	Total taxis departing the ranks empty	Total taxis departing the ranks with passengers	Total taxis departing the ranks	Total passengers departing the ranks	Average passengers per taxi	Average vehicle wait time at the ranks per taxi (minutes)
Total for all locations	135	235	370	327	1.4	7
Pomarium Street	2	0	2	0	0.0	0
South Street Tesco	23	56	79	73	1.3	4
Railway Station	12	50	62	76	1.5	9
Murray Street	98	129	227	178	1.4	8

Friday - Saturday						
Rank location	Total taxis departing the ranks empty	Total taxis departing the ranks with passengers	Total taxis departing the ranks	Total passengers departing the ranks	Average passengers per taxi	Average vehicle wait time at the ranks per taxi (minutes)
Total for all locations	179	336	515	517	1.5	3
Pomarium Street	1	0	1	0	0.0	0
South Street Tesco	23	70	93	102	1.5	4
Railway Station	19	52	71	95	1.8	11
Murray Street	136	214	350	320	1.5	2

Saturday - Sunday						
Rank location	Total taxis departing the ranks empty	Total taxis departing the ranks with passengers	Total taxis departing the ranks	Total passengers departing the ranks	Average passengers per taxi	Average vehicle wait time at the ranks per taxi (minutes)
Total for all locations	150	372	522	607	1.6	3
Pomarium Street	2	0	2	0	0.0	0
South Street Tesco	28	56	84	73	1.3	5
Railway Station	20	54	74	94	1.7	5
Murray Street	100	262	362	440	1.7	2

All 3 days					
Rank location	Total taxis departing the ranks empty	Total taxis departing the ranks with passengers	Total taxis departing the ranks	Total passengers departing the ranks	Average passengers per taxi
Total for all locations	464	943	1407	1451	1.5
Pomarium Street	5	0	5	0	0.0
South Street Tesco	74	182	256	248	1.4
Railway Station	51	156	207	265	1.7
Murray Street	334	605	939	938	1.6

The number of passengers who had to wait at a rank for a taxi, is presented in Figure 2, aggregated across all ranks.

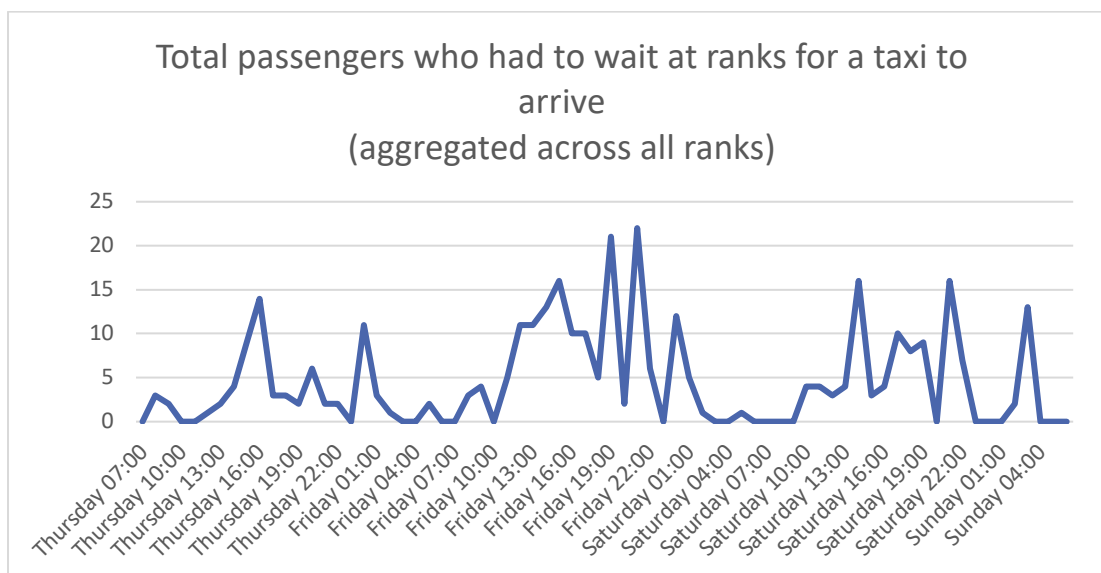


Figure 2 - Total waiting passengers each hour (Perth)

Waiting passengers in each hour, as a proportion of all passengers during the same hour, are presented in Figure 3.



Figure 3 - Proportion of boarding passengers who waited for a taxi (Perth)

The levels of passenger activity at the ranks were analysed and the graph presented below summarises the profile of activity at each of the ranks.

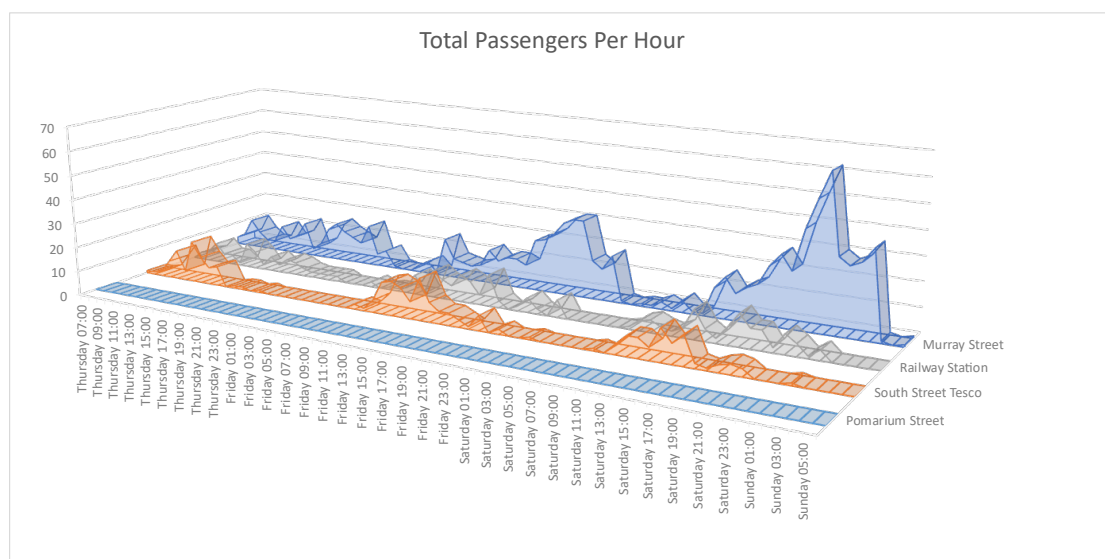


Figure 4 – Observed 2024 volumes of passengers through each rank

The profile of passenger demand is dominated by the Murray Street rank during the evenings and in particular, Friday and Saturday evenings. No activity was observed at South Street – Loft rank location. Hence, the rank is not included in tables and figures.

Taxi hire profile

The number of passengers hiring each taxi varies. Therefore, we also present a profile of taxi hires from each rank and from all ranks combined, each hour.

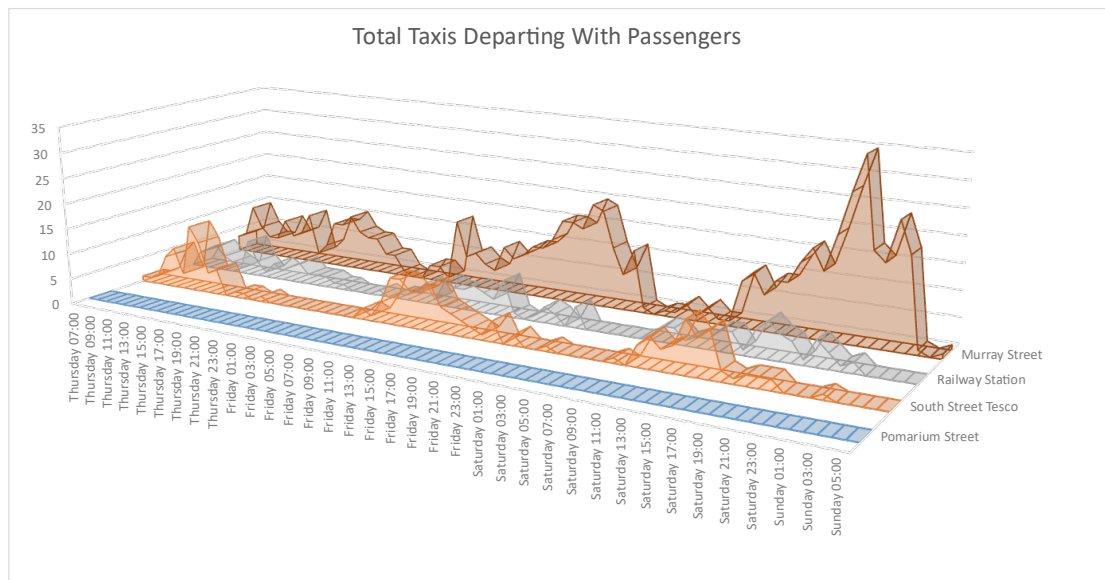


Figure 5 - Observed 2024 volumes of taxi hires through each rank

The hourly profile of hires per hour, aggregated across all ranks is also presented.



Figure 6 - Observed 2024 volumes of taxi hires aggregated across all ranks

The profile in Figure 6 indicated a similar level of hourly activity for Friday and Saturday evenings. There was a brief peak of hire activity on Saturday night. However, this was not a large enough peak, either in magnitude or

duration, for the profile to be considered highly peaked. This assessment is used to determine one of the variables in the calculation of the Index of Significance of Unmet Demand.

Estimation of the number of taxis working from ranks

The rank observation data was processed to provide an estimate of how many taxis were working from the ranks during each hour of the survey. The nature of work undertaken by most of the taxis in the fleet is a mixture of rank hires and pre-booked hires. Therefore, not all working taxis were working from the ranks at any given time, some were undertaking pre-booked hires and were not available for hire from ranks.

The estimate derived is the number of full time equivalent taxis working from the rank, rather than a count of how many distinct taxis were observed at some point during each hour. i.e. how many taxis spend each hour either conveying passengers from the ranks or waiting at the ranks for a passenger. Typically, at peak activity levels, taxis, which pick up only from ranks, may undertake around 3 to 5 hires per hour, if passengers are queued at the rank. At other times, the number of hires is lower and taxis wait at the ranks between hires. However, in Perth, some taxis undertake both rank hires and pre-booked hires and some undertake only pre-booked hires. A common scenario would be that a taxi may pick up a hire from a rank, then pick up one or more hires from non-rank locations, through pre-booked hires. Under this scenario where taxis may work from a rank for part of an hour, only that fraction of the hour is counted towards the aggregate taxi equivalence. Figure 7 presents the aggregate equivalent taxis working from ranks and excludes any other taxis either not working during that hour, or undertaking pre-booked hires.

The following examples illustrate how equivalences are determined, within a single hour.

In this example, a taxi waits at a taxi rank for 5 minutes, then picks up a fare and travels for 10 minutes to the destination. The wait time at the rank and the duration of the trip hired at the rank, both count towards rank based working time. The taxi then is hired to pick up passengers from non-rank locations through pre-booked hires. These hires take up the rest of the hour. The taxi spent 25% of the hour on rank based hires, either waiting for a hire or conveying a passenger from the rank. Therefore, in the taxi equivalence calculation, the taxi would count as 0.25 of a taxi working solely from the rank.

Alternatively, we consider a taxi which waited at a rank for 5 minutes then picked up a fare, which took 10 minutes to the destination, then returned to the rank 10 minutes later, waited 15 minutes at the rank, picked up another fare from the rank and travelled 10 minutes to the destination, then returned to the rank 10 minutes later. In this situation, the taxi was

engaged in waiting at the rank, or travelling to or from the rank, for the full hour. Hence, under this scenario, the taxi would count as a full equivalent taxi working solely from the rank.

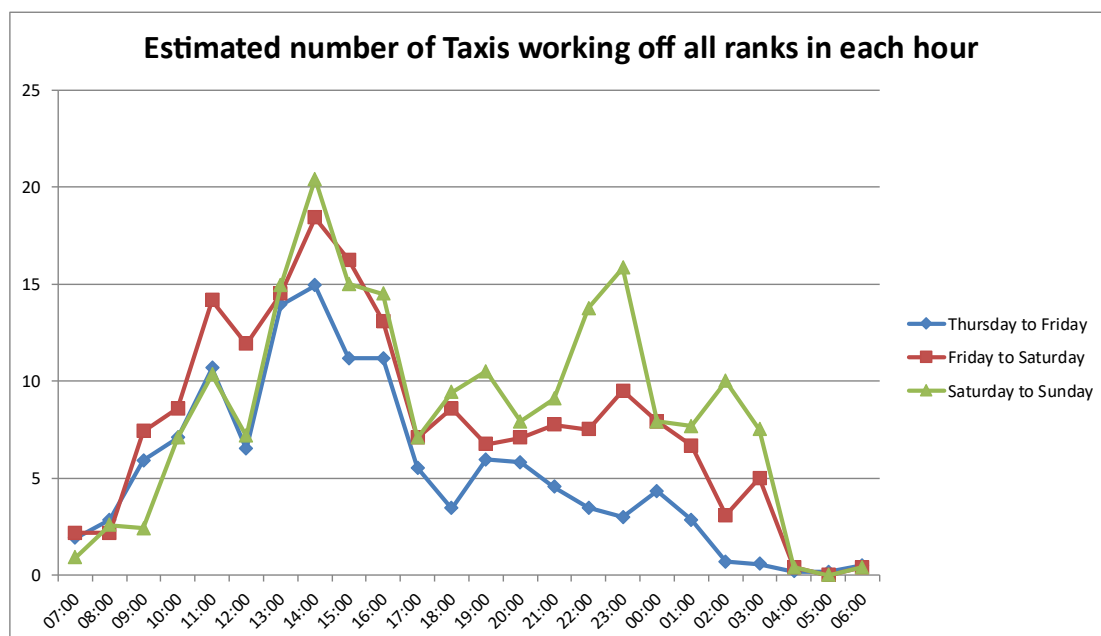


Figure 7 - Estimate of taxis working from the ranks (Perth)

The number of taxis working from the ranks peaked mid afternoon each day. There were more taxis working from the ranks on Friday and Saturday nights than on Thursday night. However, the number working at night from the ranks was generally lower than in the afternoon, each day.

As discussed earlier in the report, some taxis obtain some of their hires through pre-booking, either directly with the driver or through a booking office or web site. Consequently, if some drivers are undertaking pre-booked hires, they would not be seen to be working from the ranks at these time. Therefore, the number of taxis working from the ranks as indicated in Figure 7 are unlikely to reflect the true total of all taxis working during each hour.

4 General public views

It is very important that the views of people within the area are obtained about the service provided by licensed vehicles. A key element which these surveys seek to discover is specifically if people have given up waiting for taxis 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 taxis and Private Hire Cars within the study area, and to provide an opportunity 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 taxis waiting at ranks.

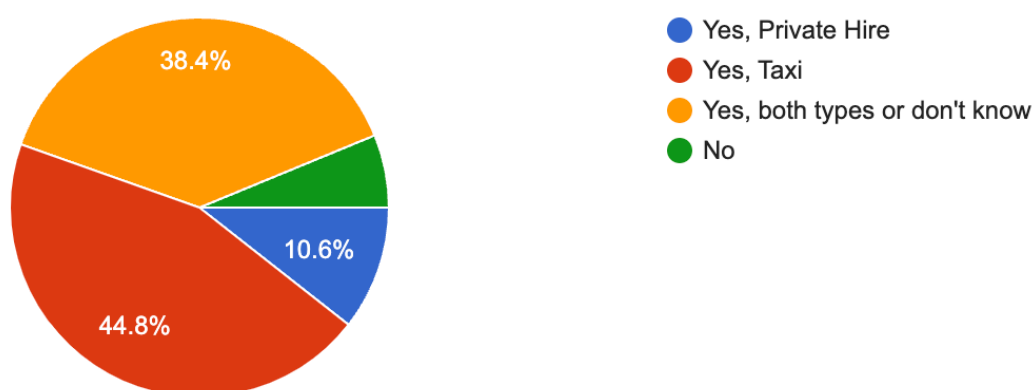
An online survey was used to gather opinions from members of the public.

The results of the survey are presented in this chapter. Not all questions were answered by all respondents. The total number of answers to each question have been presented in this chapter along with percentages relating to the total responses to each question, rather than a percentage of all people interviewed.

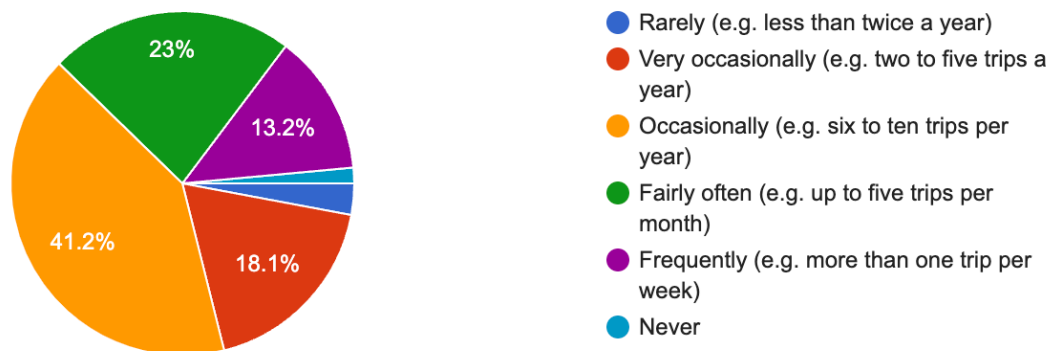
Perth public attitude survey results

A total of 435 survey responses were received.

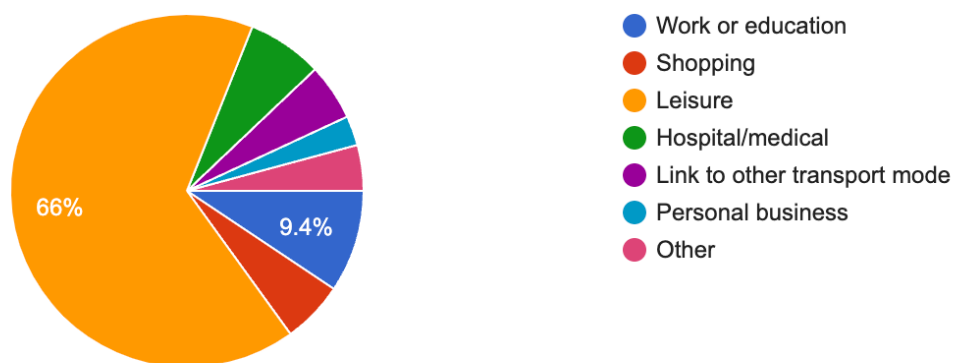
In the last three months, have you made one or more trips by Taxi or Private Hire Car in Perth and, if yes, was this a Taxi or Private Hire car?



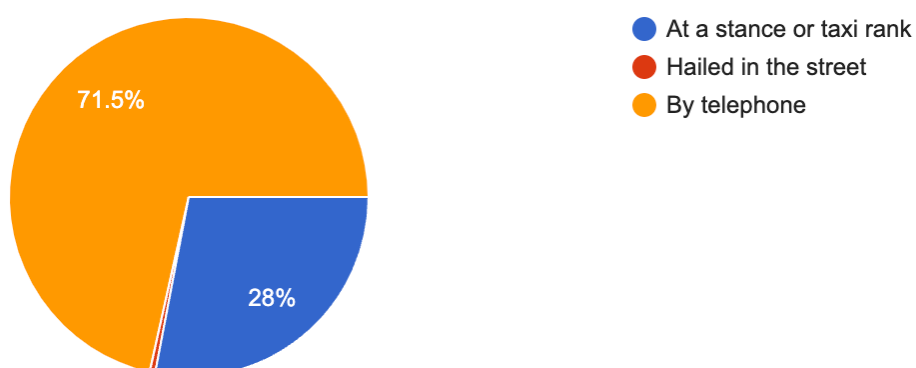
How frequently do you travel by Taxi, as opposed to Private Hire car?



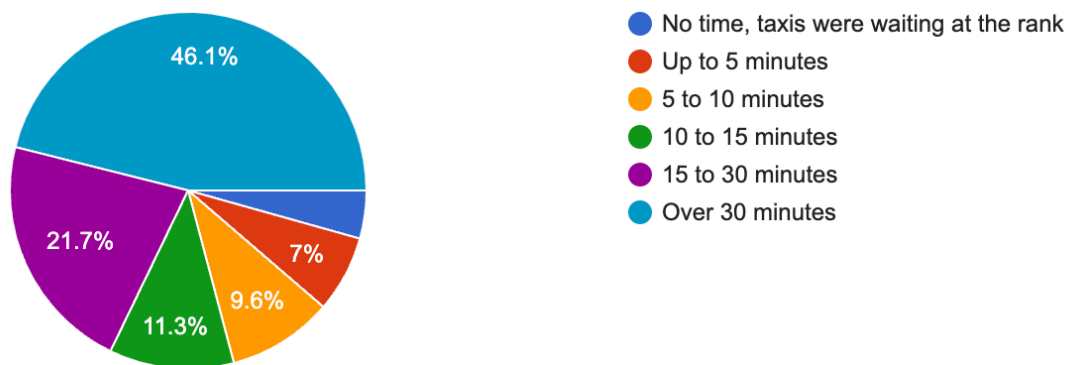
What was the purpose of your last trip by taxi?



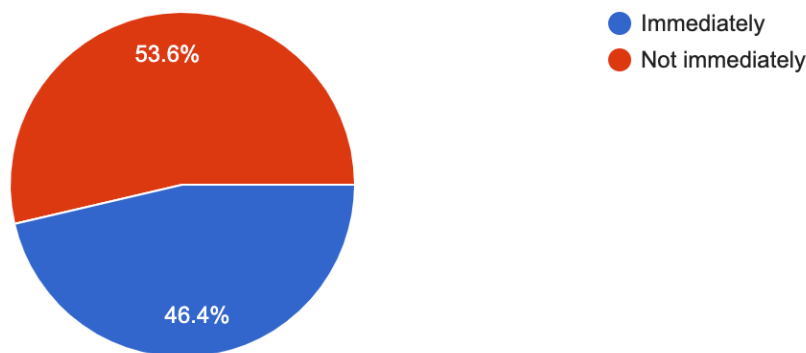
Regarding your last trip by Taxi or Private Hire Car, how did you obtain your Taxi or Private Hire Car?



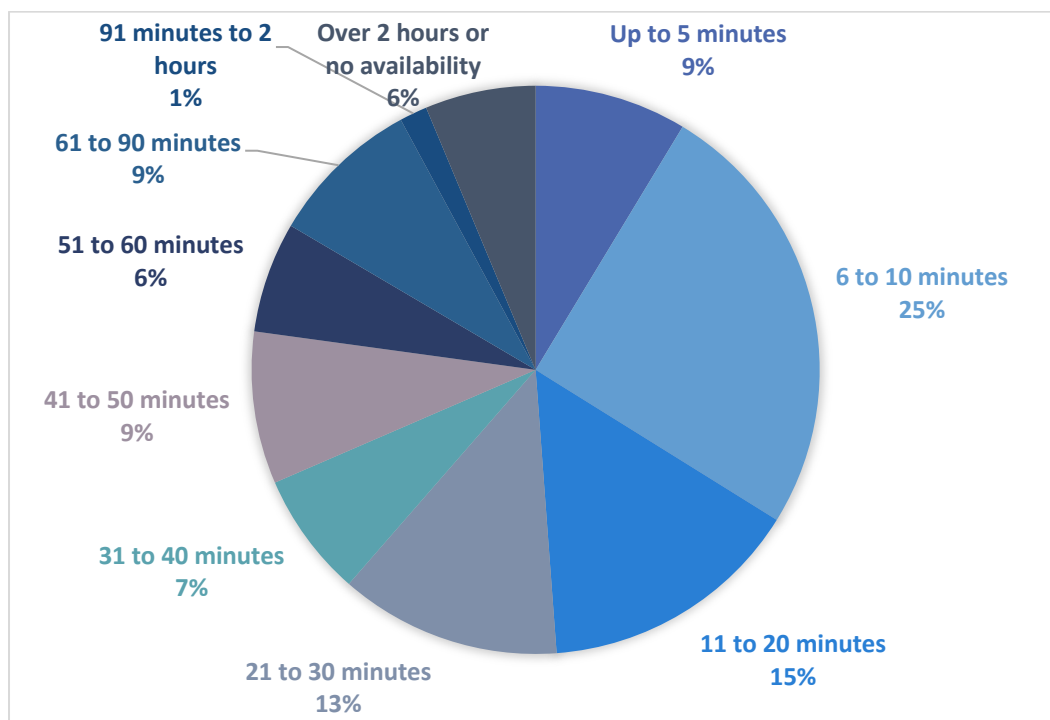
If hired from a stance or rank – How long did you have to wait for a Taxi at the stance? (minutes)



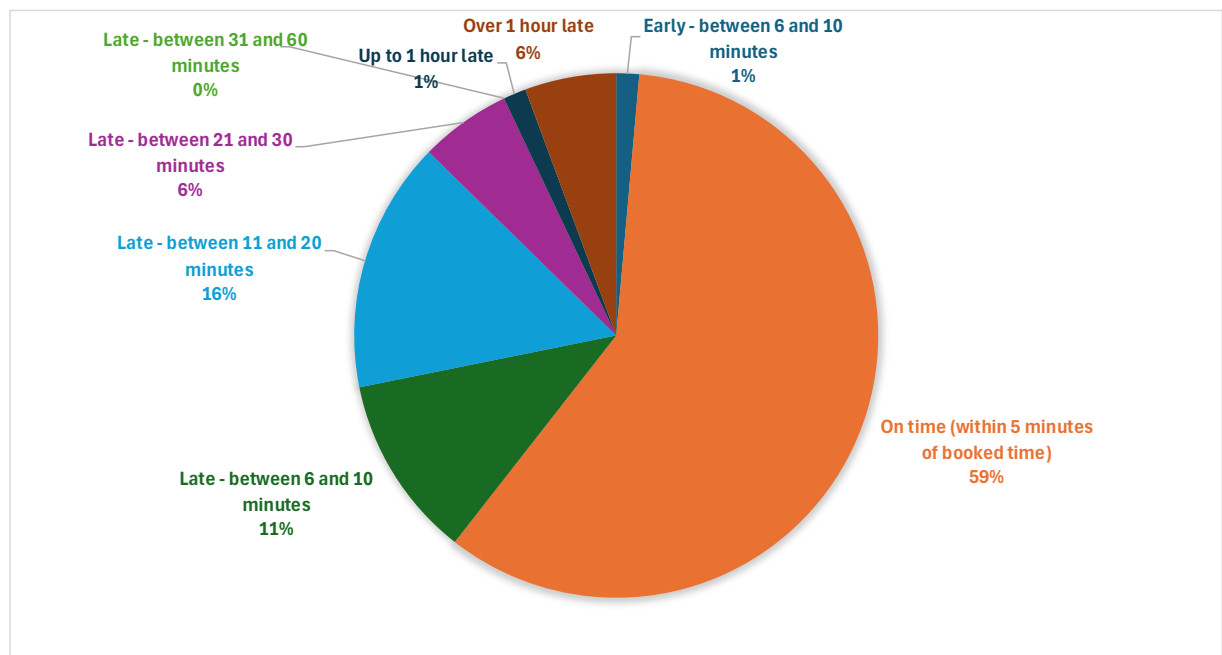
If hired by telephone- Did you require the Taxi or Private Hire car immediately, or did you pre-book it for another time?



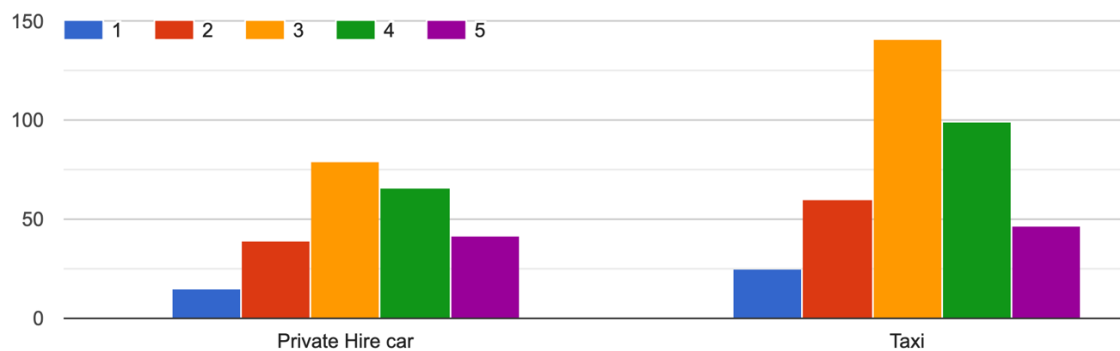
If you telephoned for an immediate booking, how long did it take for the Taxi or Private Hire car to arrive? (minutes)



If pre-booked for another time, how close to the booked time did the Taxi or Private Hire car arrive?

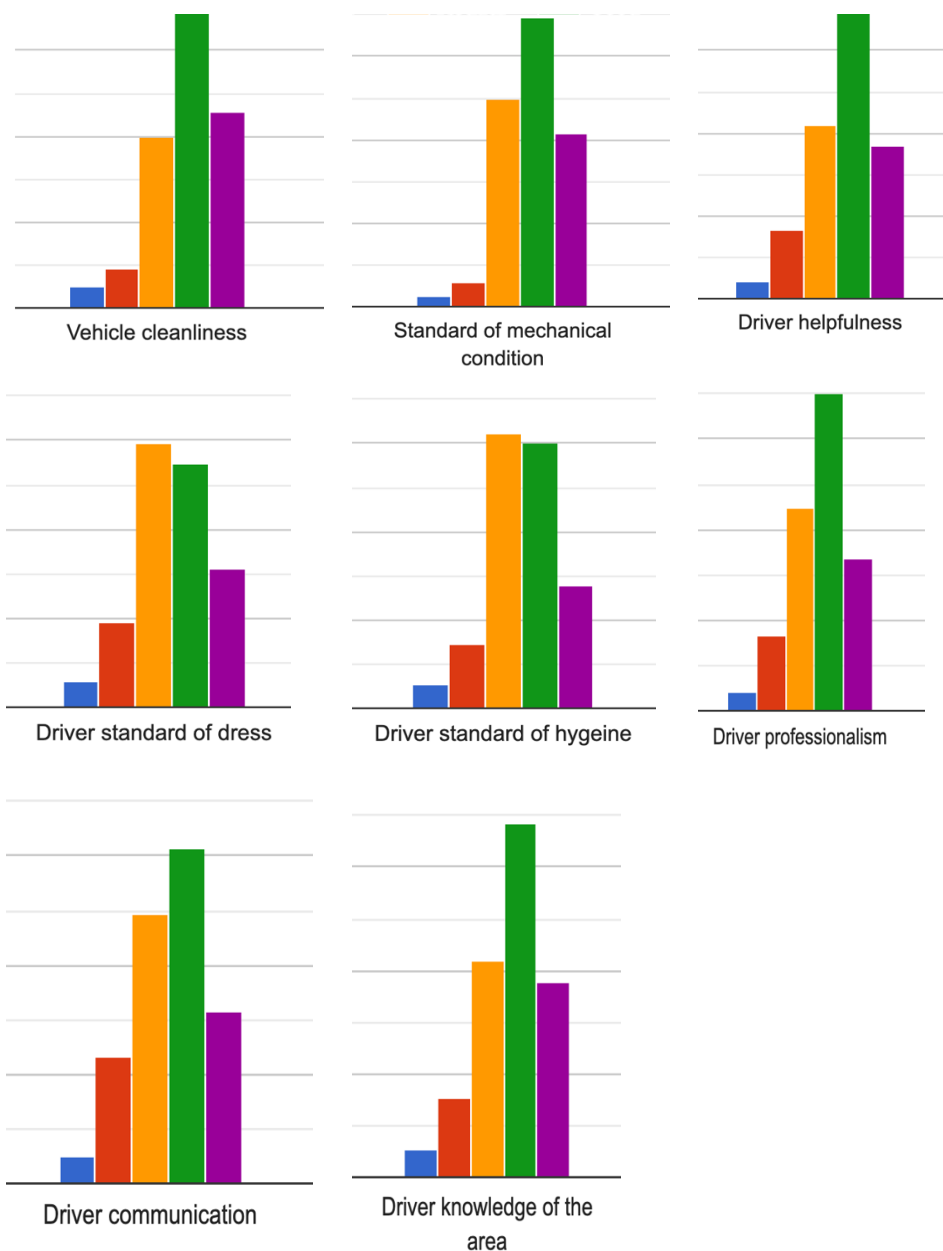


How did you rate your most recent trip by taxi or private hire car for value for money with 1 very poor and 5 very good?



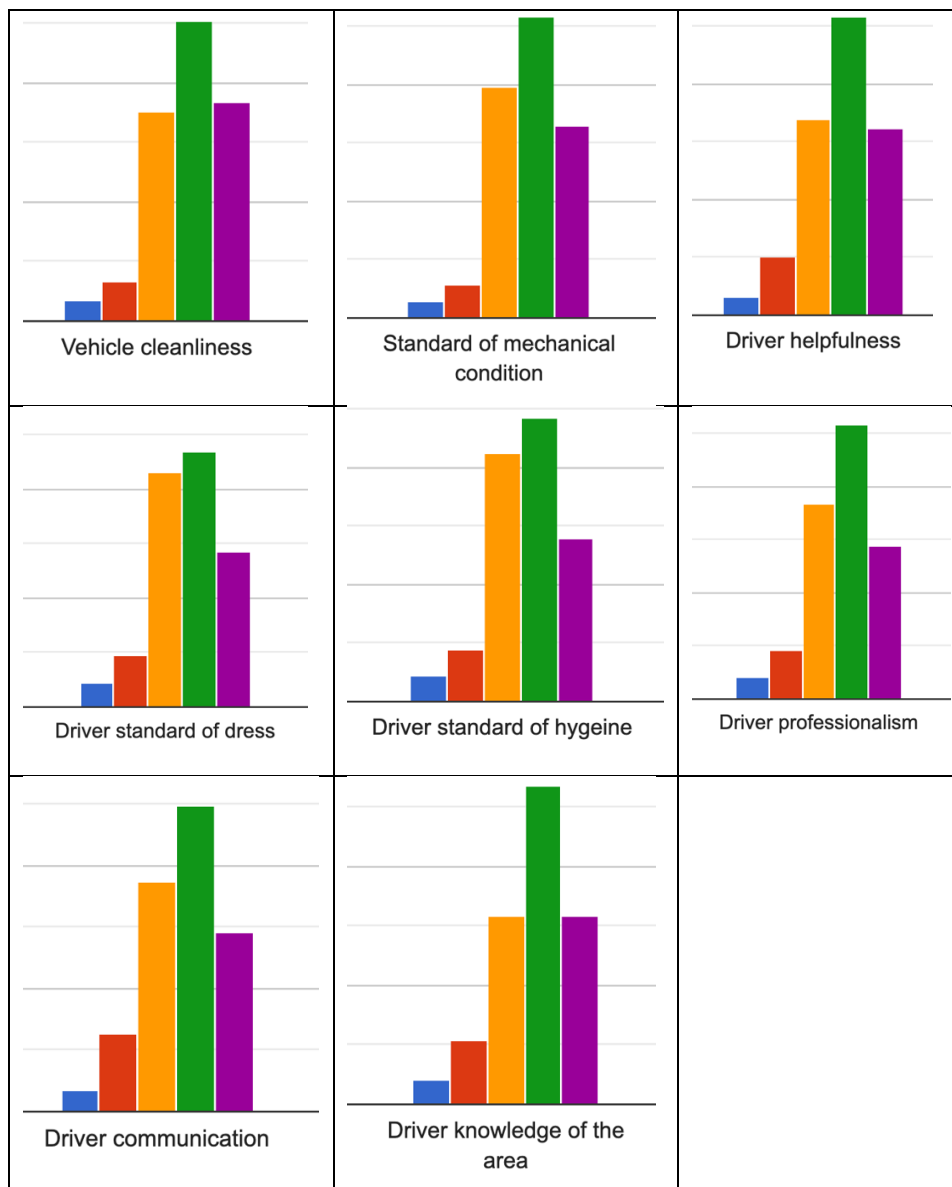
With respect to the standard of **Taxis**, in Perth. How would you rate the following aspects:

Very poor Poor Neutral Good Very good

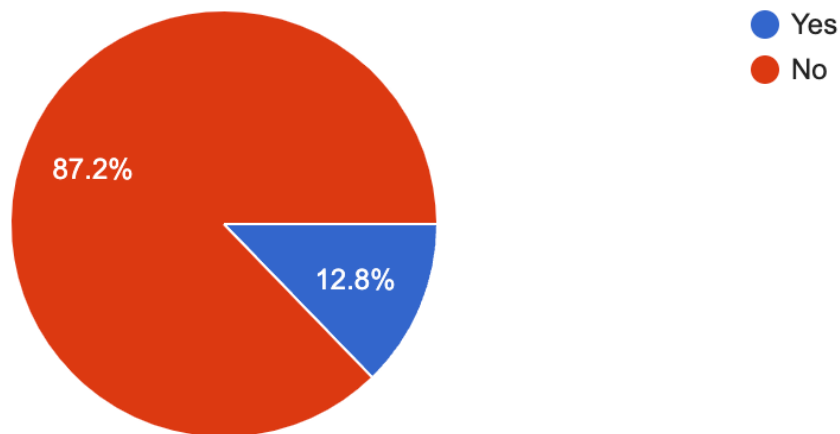


With respect to the standard of **Private Hire Cars**, in Perth. How would you rate the following aspects:

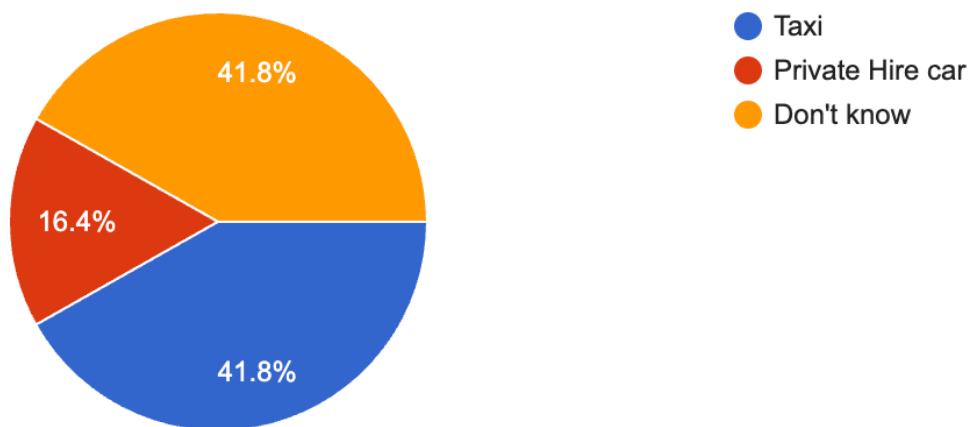
Very poor Poor Neutral Good Very good



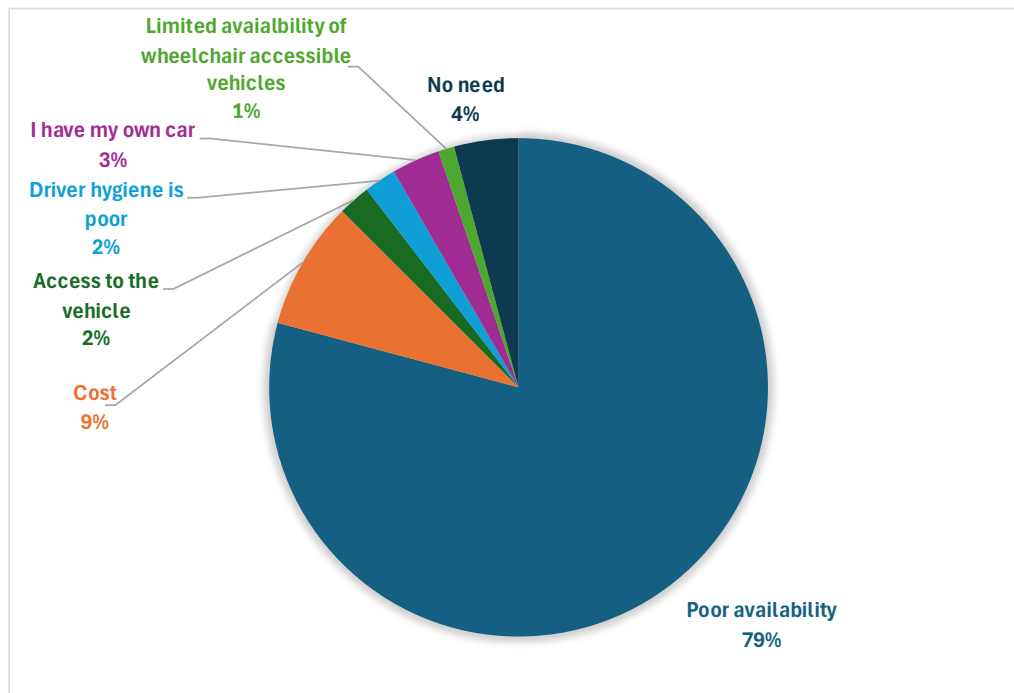
Have you encountered any difficulty in entering or exiting any particular type of Taxi or Private Hire car?



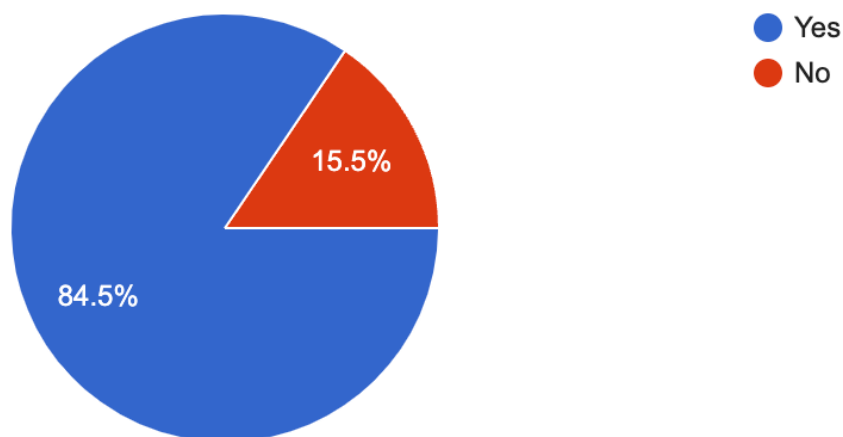
If yes, do you recall which type of vehicle this was?



What is the principal factor which limits your use of Taxis in Perth?



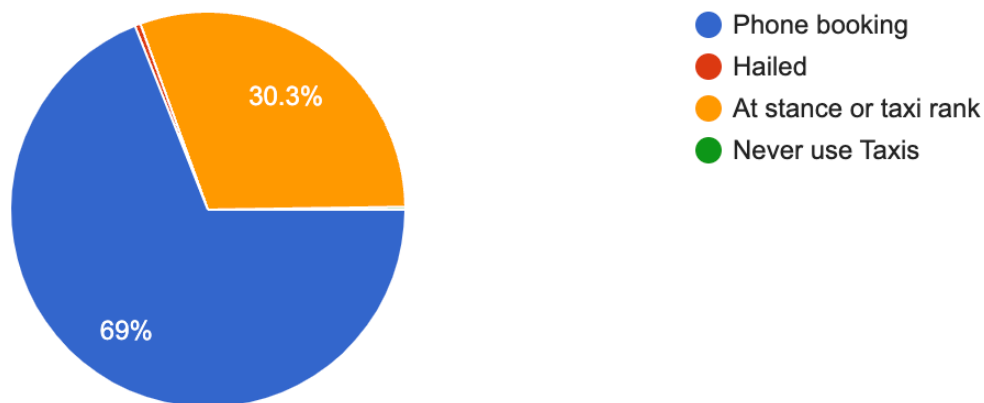
Have you experienced problems in obtaining a Taxi in Perth in the last three months?



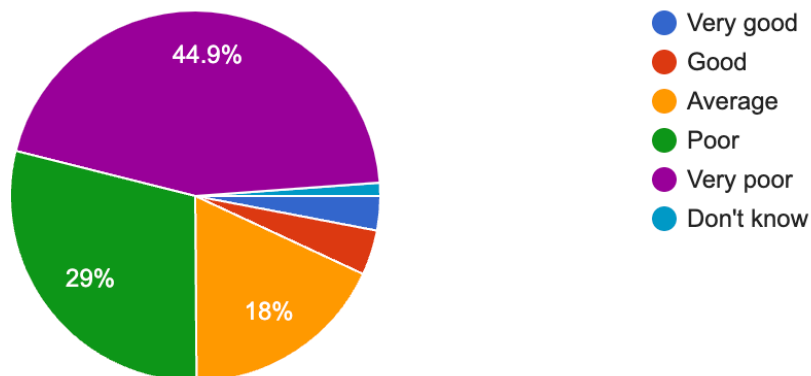
If yes, approximately what time and day of week did this occur?

348 responses were received to this question. Responses included a broad spectrum of days of the week and times of day. Many respondents indicated that at most times of day and days of the week, there were difficulties. A slightly more popular response indicated that there was particular difficulty obtaining taxis during weekday mornings and afternoons, particularly during 'school run' times. Other popular responses indicated that Friday and Saturday nights were particularly difficult times to obtain a taxi.

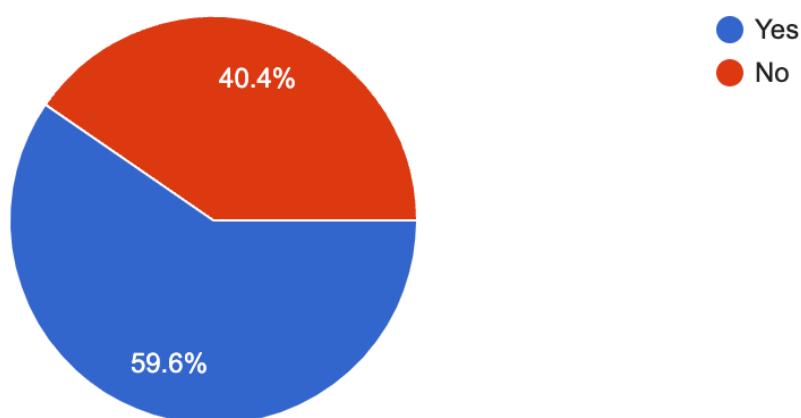
What method do you use most often to obtain a **Taxi** (NOT PRIVATE HIRE!)?



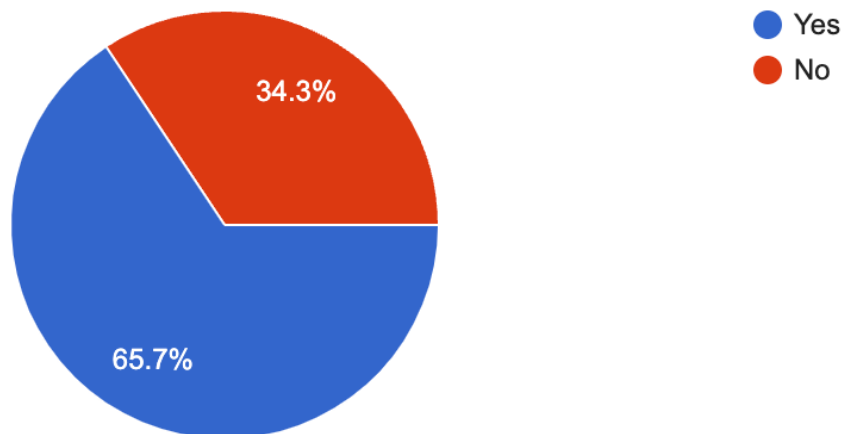
How would you assess the availability of **Taxis** in Perth?



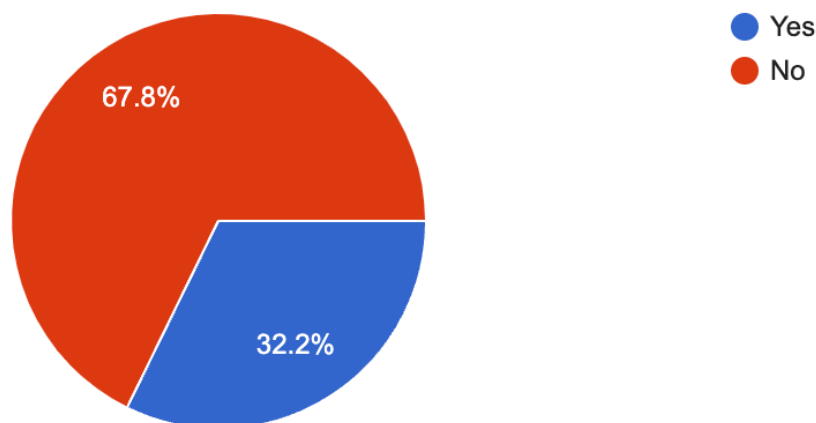
If the cost of Taxi fares was to increase by 10%, do you think this would lead to you using Taxis less frequently?



If the cost of Taxi fares was to decrease by 10%, do you think this would lead to you using Taxis more frequently?



Are there any locations where you would like a new Taxi Rank?



Respondents were asked to specify locations where they would like to see new taxi ranks. Some respondents indicated general locations such as 'the City Centre' or 'Supermarkets' or 'retail parks'.

Some popular suggestions for specific locations were:

Broxden Park and Ride - Justification was given by some that intercity buses which call at the park and ride, don't go to Perth Centre and taxis would connect to the city centre.

Concert Hall – Close do daytime shopping and evening venues.

High Street – A central location.

George Street – Close to night time venues

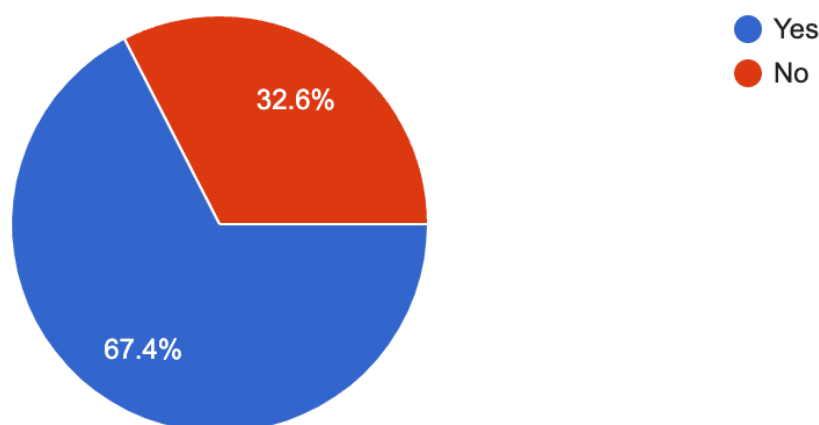
Tay Street – Close to night time venues.

Additional suggestions were made for taxi ranks in locations outside Perth, in other locations in Perth & Kinross.

Taxi ranks work effectively if drivers have a reasonable expectation of obtaining a fare from the rank. Rank locations which generally work best are located where taxis can reach a rank as part of a route returning to another rank. For example, if drivers operate from the Murray Street rank, they may return to the Murray Street rank after dropping off a fare. If the route back to the Murray Street rank involves passing another rank location, the driver may see if there are any waiting passengers, or indeed if the taxi queue is short and consequently decide to wait at that rank, rather than return to the Murray Street rank. In this way, supply is better balanced across ranks. Using an alternative example, if a new rank is placed in a location which requires a detour of several minutes to visit the rank, drivers are less inclined to visit the new rank 'on spec' and are more likely to invest the time required for the detour, to return to the established rank at Murray Street and wait in the taxi queue.

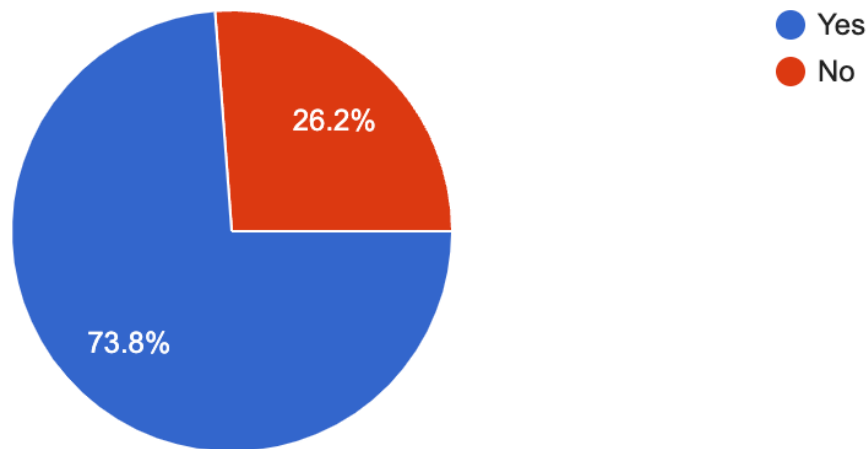
At present, the Murray Street rank is effectively the only rank operating at night in Perth. Several of the suggestions made were aimed at establishing a new night time rank which is closer to some of the night time economy venues than Murray Street. The rank outside, on South Street was identified as one which several respondents would like to see "reopened". In the past, the rank in this location has been a busy night time rank. However, the presence of parked vehicles at night on the rank space has prevented the use of these spaces as a taxi rank in recent times.

Are there any existing Taxi ranks that you would use more often if Taxis were more reliably found there?



Respondents were asked which ranks they would use. They indicated all of the existing ranks which are in common use.

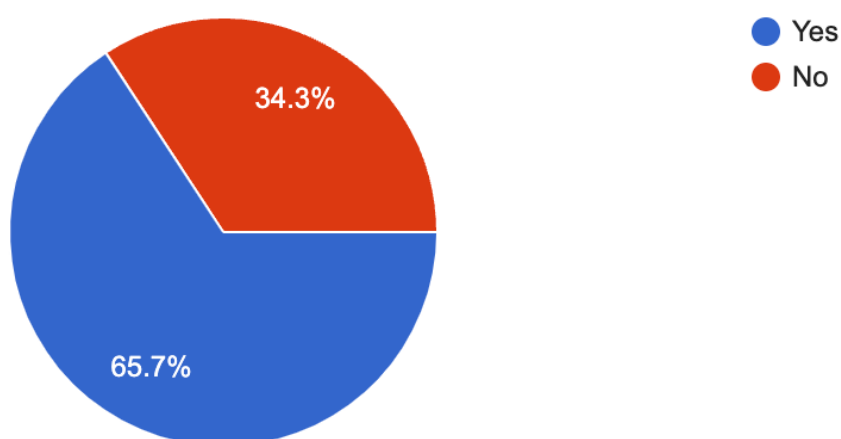
Have you wanted to hire a Taxi in the last three months at a taxi rank or by hailing and given up or made alternative arrangements for travel because none were available?



Whilst 73.8% of respondents indicated that they had given up at a taxi rank, the respondents were asked a supplementary question to establish whether the incident occurred at a valid taxi rank location or at another location. 97.8% of those who indicated that they had given up, stated that this had occurred at valid rank locations in Perth. The remainder of responses suggested that they had given up on pre-booked hires or at locations which were not valid taxi ranks, including locations outside Perth.

Consequently, the valid response for those who had given up waiting was 72.2%. This statistic is used in the calculation of the Index of Significance of Unmet Demand.

Have you wanted to book a **Taxi** specifically, as opposed to a Private Hire car, by telephone, app or online, for immediate travel, in the last three months and had to make alternative arrangements because a Taxi was not available within a reasonable time?



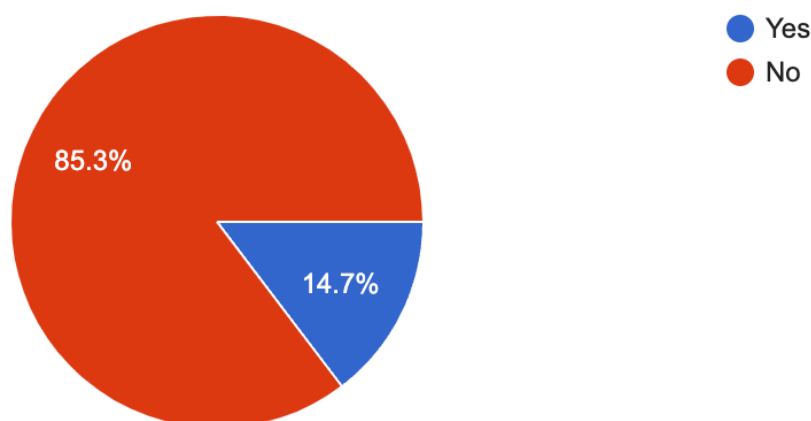
What features of Taxi services in Perth & Kinross that you feel are particularly good?

The most popular response was that the drivers were knowledgeable and friendly.

What would encourage you to use Taxis more frequently?

The most popular response was increased availability.

Do you, or anyone with you on a taxi journey, within the last 3 months, have a mobility or visual impairment or travel in a wheel chair?



The most common impairments were mobility impairments, some of the passengers with mobility impairments were also wheelchair users. There were also a range of other mobility impairments identified, including breathing difficulties and difficulties with joints.

Respondents also identified visual impairments, hearing impairments and learning disabilities, amongst other impairments.

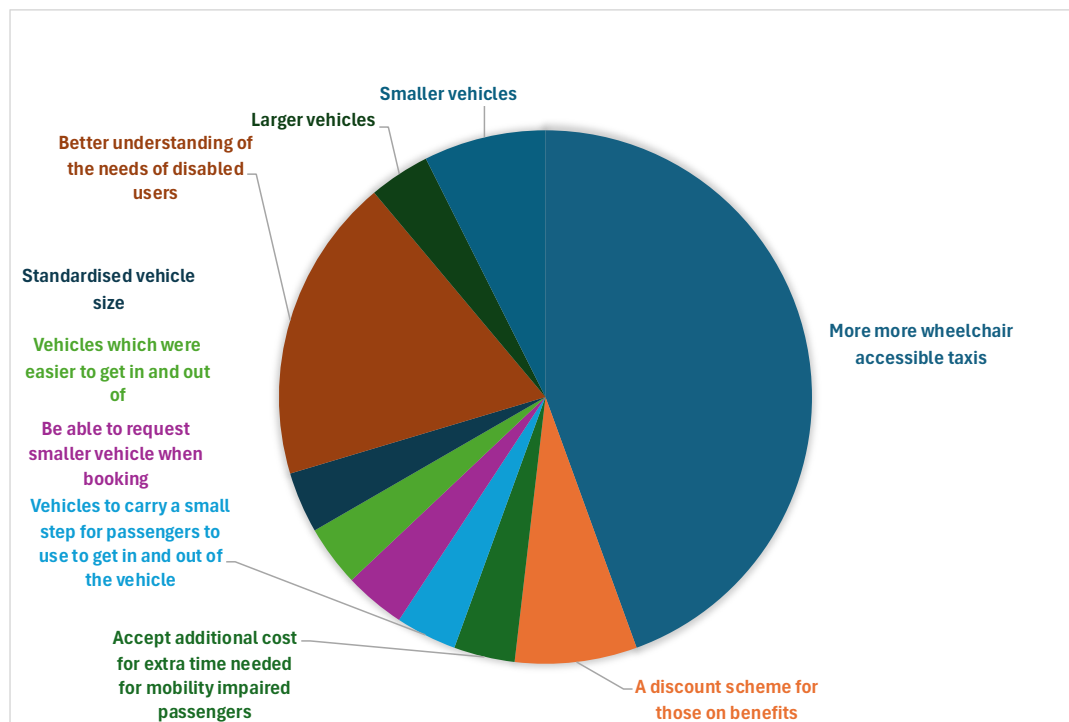
Did this cause any difficulties when travelling? If yes, please describe.

Around 8% of those respondents who indicated an impairment, indicated that the impairment did not cause any difficulties. The remainder indicated a range of difficulties, which included the following, which are listed in reducing order of frequency:

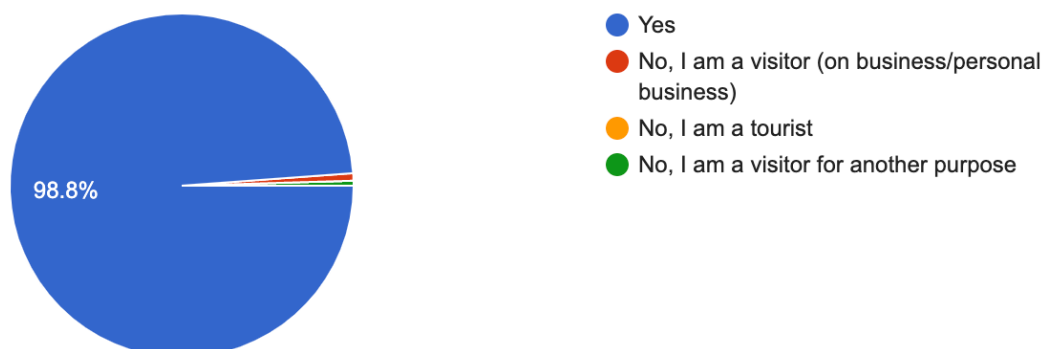
- Difficulty getting in and out of vehicles, including identifying that cars are too low to get in and out of easily and larger vehicles are too high to get in and out of easily.

- Lack of wheelchair accessible vehicles.
- Difficulty with walking the distance to the taxi rank / pick up location or walking from the taxi drop off location. This is an issue when travelling to pedestrianised areas.
- Difficulty with standing for extended period whilst waiting for a taxi to arrive.
- Difficulty fitting walking frame / wheelchair into the vehicle.

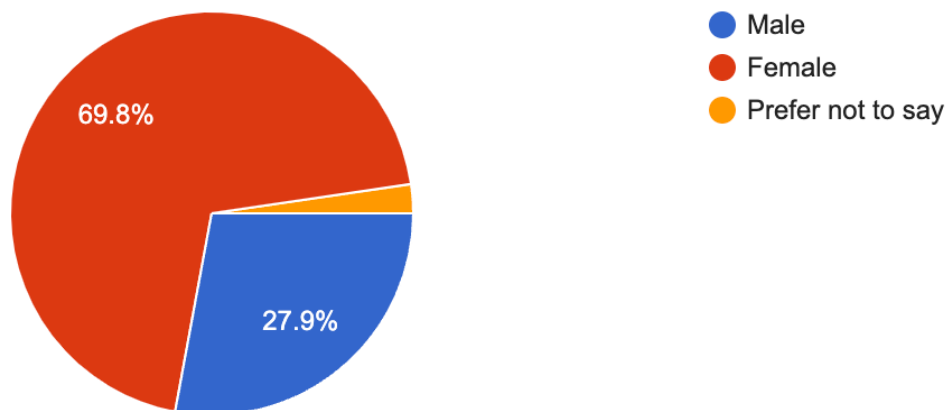
How would you suggest these difficulties could be reduced for travel by taxi in Perth?



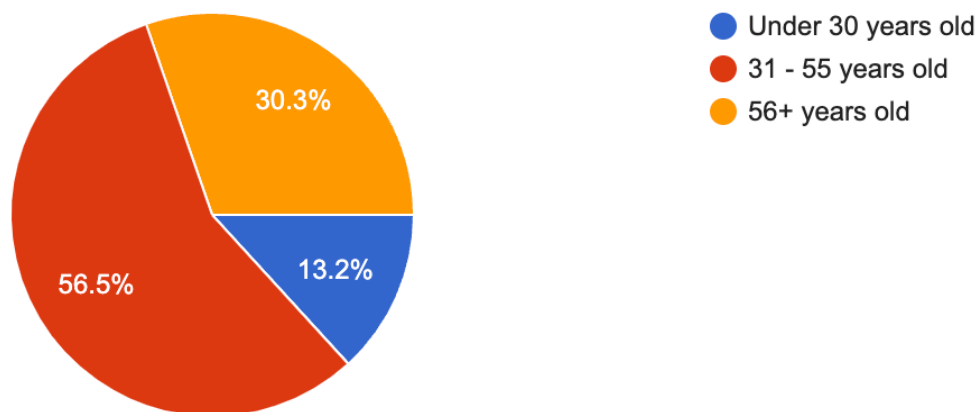
Are you a permanent resident in Perth & Kinross Council area?



Are you:



What age range do you fall under?



Do you have any other comments, suggestions or points to make which are not covered in the earlier questions?

Responses included the following statements:

Bring in Uber

Taxis are expensive and unreliable! Uber would help with competition and is much safer

Make both the bus and taxi service more accessible at night for times.

Lack of buses now means people need more taxis and this has not happened meaning people having to walk home late putting themselves in vulnerable situations.

Taxi's are expensive to rural areas, and no buses available either

Rural areas not covered

Tariff prices should also be reviewed, during the cost of living crisis, those seemed to have risen; this could have a negative impact on companies cash flow resulting in potential closure. PKC could help these companies out?

Transport generally in Perth is terrible. Availability, frequency and high costs. It is easier and more convenient to drive these days. There's no encouragement for people to use services.

The reinstatement of rural bus services would reduce the requirement for taxi services. Students, elderly and the disabled population have been particularly affected by these cuts along with opportunities for socialising/visiting areas in Perth without their own vehicle. A communal / shared travel taxi service option would be good in rural areas where bookings can be shared at the discretion of the taxi driver and customer to improve efficiency, reduce costs, reduce the carbon footprint and, I suspect also, reducing wasted time for the taxi firm traveling to more rural areas. Reliable availability of a taxi service to rural communities would be beneficial.

Look at who holds the plates in Perth. If they are not being used to be of service to the community then they should be revoked and given to taxi companies who will be of service. Perth also needs Uber. I've just spent 3 weeks in the U.S.A and the service was brilliant and inexpensive.

Uber would benefit residents in Perth & Kinross. Taxis between outlying areas are charged from Perth making this travel almost impossible. The uber concept provides a more customer focused and cost effective approach.

Taxis must improve. It's 2024!

My daughter and her pals have struggled to get a taxi home at night and ended up having to walk 3-4 miles home in the early hours of the morning, this is not a safe thing to do for a young women.

It's having an impact on people going out socialising when you can't guarantee getting home at the end of the day

Footfall in the city centre from surrounding areas of Perth and outskirts of Perth may be improved if availability and service improved. I now travel via bus from Broxden to travel outside of Perth for dinner/drinks, or drive out with Perth, to avoid having issues getting home late at night as I am unable to get a taxi and buses within the city centre do not run late enough. I previously lived in Dundee and never had availability issues with Taxi's, there were far more ranks and far more taxis around town late at night and at peak times.

Please make sure companies have accessible taxis on in evening and weekends it would make the world of difference.

There are so few taxis, there is little competition so price wise you are over a barrel.

Please get more taxis

Just that in the big cities Uber has been extremely useful and affordable and extremely easy to get a taxi with them

I think our taxi provision is not as bad as some people suggest. I travel and often find other cities more frustrating than Perth

It is unsafe for women to be waiting hours for a taxi possibly attempting to walk home alone after a night out due to no taxis being available leaving them vulnerable

With a limited bus service now especially after 8pm Perth needs more taxis especially later on in the evening

The lack of availability is starting to get dangerous. People are being forced to walk distances late at night because of no other option. As a young woman, that makes me feel unsafe. It's not much better being forced to stand at a rank for at least 30 minutes if you are on your own.

Our bus service is awful with last bus from city centre to Oakbank at 8pm. Can't have a night out without someone driving or trying to find a non existent taxi

Some taxi drivers shouldn't have their badges. When they jump red lights all time

Taxi services refuse to pre book taxis on Friday/Saturday nights when it's really busy but this puts hospitality workers in danger having to walk home alone. Provisions should be put in place to ensure that cars should be available to book in advance for staff.

The lack of taxis is stopping us from going out later or staying out - we tend to leave early due to the lack of taxis to get home

Would love uber in PKC. Very poor public transport from Luncarty, especially on Sundays. Also no buses from Broxden park and ride on Sundays so rely on taxis there. A rank there on Sundays?

An app for checking the availability of taxis, from all the companies operating in Perth, at any time day or night

Need more taxis on a sat night put me off going out on sat night as don't want to walk home alone.

In a town that you can walk across in 60 minutes, anything more than a 5 minute wait for a taxi is unacceptable.

Taxis are unavailable during school pick up and drop of times, as they all seem to be on contacts.

Demand for taxis wouldn't be so bad if a late bus was run on Saturday nights to get people home safely. We are supposed to be a city.

Taxi drivers in Perth are generally very good and deserve as much support as possible to maintain this

Due to lack of available taxis at ranks I now phone in advance. It would be nice to be able to be spontaneous and know if I am out that I have a safe and reliable way home by taxi

It would have been helpful for you to include the question, where you hail a taxi as you've omitted visiting an office

Think I've said it all. It's a disaster. Get a school bus and make more taxis available for disabled and just people in general.

Only issue I have is the lack of taxi coverage. Having to wait up to 30 mins or even an hour for a taxi

Improvements to the bus service would reduce demand to a manageable standard for taxis. Lack of evening buses impacts on the local economy...if you live out of Perth it's cheaper to stay in a hotel than get a taxi home

I also think there should be more female, taxi drivers.

Safety paramount and taxi ranks could do with a police presence at weekends especially Mill Street [Murray Street]

Taxi services in Perth have been the same for 40 year, it's needs to be updated to help attract people to Perth

Please remove some School contracts. Owners make money make enough money from them leaving no requirement to work evenings or weekends.

Please bring back the no 8 Hillend bus after 8pm evenings, disgraceful cutting this. Used to be bus from town 9.15pm, 10.15pm + 11.15pm now last one 8pm!!

Some taxi ranks using apps I feel cancel bookings unexpectedly. Please don't provide an app if it's not linked to main booking system

It's going to have a knock on effect of other areas of the city such as nightlife as many people aren't going out as they know they will have to wait well over an hour to get home, this is made worse by the change in bus timetables by stagecoach. Having more taxis for the last train of the night for similar reasons; people may have been traveling all day and finally

get back to Perth then still have to wait over an hour to get home. I have had to go to work in Dundee at short notice and tried to call a taxi and been told no because they can't spare any cars for that long a journey

Support and encourage taxis for evening and weekend work

A notable reduction in bus services and taxi availability has resulted in more of our social and entertainment expenditure being in Dundee/Broughty Ferry and Glasgow areas as it is now, remarkably, easier to get a bus home from these places than it is to get a bus or taxi home from Perth city at the end of a night.

At times the service in Perth is an absolute disgrace. I have missed appointments because I couldn't get taxis at the rank. Most of the time it is completely unreliable

Perth council need to sort out the available transport into the CITY centre. It's a disgrace and I'm surprised businesses can survive when's it's so difficult for people to access them by public transport or taxi service. It's embarrassing.

I feel taxis are very expensive as it is, please don't look to increase them again. In comparison to other cities our starting price is quite high.

Yes, People of Perth and surrounding areas do not venture into the city as they cannot get home after 9pm at the weekend etc by the way buses are the same.

Maybe a OAP rate for older

Some taxis and drivers are better than others in keeping their vehicles clean.

Most drivers are great polite and courteous

PKC take account of high number of elderly disabled wheelchair users who need taxis for morning and afternoon appointments. Consult via lunch/tea clubs, retirement living, etc. Stop issuing WAV licences to those who don't have WAVs or drivers, get professionals in to train WAV drivers on 2 day courses, not charity on useless 2 hour course

The safety of people in town centre walking to main rank, especially in evening needs sorted out.

Bring back late night buses and add Ubers, then there won't be long waits at the too few taxi ranks.

Just would be nice for me or my daughter to be able to get home safely after a night out.

I have a young daughter and would like taxis to be readily available for her and her friends when required. I would be more reassured if the taxis were council licensed and drivers thoroughly checked to maximize safety of vulnerable people. Clear pricing structure.

Think drivers should have some kind of uniform to smarten them up and this would uplift the view of the city to tourists as well

Certain cars are extremely unclean - high standard of cleanliness should be ensured. Spot checks to monitor.

The questions about what factors determine taxi use, e.g. price, are often not relevant. I don't have a car so sometimes need to use a taxi as there are no other options for some journeys.

Improve drivers customer communication skills- in general they don't say a word to you the whole journey

Fill the gap in unmet demand in taxis by getting the late buses back!

Usually Always friendly taxis drivers

Twice have had to walk from Tulloch to Scone on a Saturday night as phoned for a taxi and no taxis available. Even after walking to the rank on Mill Street [Murray Street] and still no taxis.

Why not have taxis at railway station later at night when it is known trains are arriving eg after a well publicised sporting event/music event in Glasgow/Edinburgh and fans arrive back to Perth in dark and there are never any taxis there

The lack of taxis is proving unsafe for youngsters who are trying to get home from a night out. Hanging around in the streets at the early hours in the morning is resulting in people feeling frustrated which is leading to fighting and it is a huge danger for people who are on their own.

New drivers should be taught personal boundaries and to behave better with women.

It's quite worrying when my daughter is on a night out as getting a taxi is a nightmare. Also the rank needs to be policed better

Due to the reduced bus service in the evenings to the Oakbank area the taxi service is invaluable if you want people to support the theatre/restaurants and local businesses to keep Perth city centre thriving

5 Key stakeholder consultation

The following key stakeholders were contacted in line with the recommendations of the Best Practice Guidance:

- 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 stakeholders. 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 Best Practice Guidance. Our target stakeholders are as far as possible drawn from across the two licensing 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.

Supermarkets

It is not generally possible to contact individual supermarkets by telephone. Therefore, where possible, individual supermarkets were visited and staff at the customer service desk were asked about taxi services. Feedback from supermarkets indicated that mobile phones or dedicated taxi phones were generally used to book travel by licensed vehicles. None of the customer service desk staff were aware of any notable issues with the availability of licensed vehicles for customers. However, use of licensed vehicles was not a matter which they were generally involved with. It was rare that customer service desks were involved in helping to book a licensed vehicle. Some staff did venture opinions, based on personal experience, that reliance on taxi availability at the ranks in Perth was likely to result in a wait for a taxi to be available. It was better to try booking by phone, half an hour or so, before you were likely to need a licensed vehicle.

Hotels

None of the hotels contacted indicated that they had a Freephone facility for any particular private hire company. Most guests, if they needed a taxi

would call and book one themselves. There is often information provided by the hotels, with some local numbers. If guests made it known that they were intending to use taxis during their stay, staff would sometimes advise them that they should book their return trip in advance, in order to maximise the chance of obtaining a licensed vehicle on time.

Pubs Clubs and Restaurants

A selection of public houses were contacted to seek their views on the availability of licensed vehicles. In some cases, door staff were contacted for a face to face discussion. In general, there was an awareness that obtaining a licensed vehicle by booking with a booking office, or obtaining one at a rank, would generally involve a wait at busy times. This was especially the case late at night.

Central Perth venues generally felt that if all else fails, waiting at the rank at Murray Street would guarantee a taxi, although there may be a significant wait to get to the head of the queue.

There was some feedback that a combination of fewer venues and lack of night time transport was attracting fewer people into Perth from outlying areas. Fewer venues seemed to result in less 'critical mass' of alternative pubs clubs and restaurants, to tempt people into Perth. This, coupled with reduced public transport availability through both buses and taxis had reduced visitor numbers. Some felt that Perth residents were going to other localities which offered greater variety of night life.

It is thought that some people visiting night time economy venues booked a taxi home, in advance, with an arrangement made directly with the driver.

Hospitals

People normally made their own arrangements for taxis. Licensed vehicles frequently set down and pick up from the hospital. Occasionally, it has been noticed that some people may have to wait for extended periods for their transport to arrive. Generally there are no issues worth noting.

Police

Police Scotland indicated that they were aware that delays can occur at pub closing times and generally late at night. There was no indication that this was creating a particular problem with public order.

Disability

A sample of care homes were contacted to ask if they use licensed vehicles and if so, what level of service they received. Generally there were no issues identified by care homes. The majority of care homes use regular providers and pre book a licensed vehicle if they need a wheelchair accessible vehicle (WAV). Some care homes use a regular supplier, even though they may not have a frequent need for licensed vehicles. This

approach seems to accord some degree of priority of service. Their regular suppliers normally had a suitable vehicle available.

Consultation was undertaken with representatives of elderly and disabled user groups and Council representatives who deal with taxi contracts for school and other special need transport.

The responses are summarised as follows:

- With regards to availability of WAVs (Wheelchair Accessible Vehicles) at taxi ranks – members [wheelchair users] have told us that they do not visit ranks as they do not expect a WAV to be available.
- If WAV taxis were more regularly available at ranks, the preferred means of hiring a licensed vehicle (by wheelchair users) would still be by pre-booking, as most trips are not to or from a location near a taxi rank.
- Driver awareness of the needs of disabled passengers is generally ok to good. Some drivers forget on occasion that different people have different needs. Some awareness training is available to drivers.
- Occasionally taxis don't turn up, or turn up late and due to this people are missing NHS appointments. As a consequence, travel is often booked for an earlier time to allow more of a margin for late arrivals.
- Availability of taxis, especially WAVs tends to be the biggest issue in recent times. People report that they are unable to book a WAV and that they may get one to take them to a venue but cannot guarantee they will be available to pick them up. Which they've said can cause anxiety or cause them not to book events in the first place.
- Lack of taxi availability around school contract times remains an issue for pre-booked hires. This is especially difficult if a WAV vehicle is required.
- Often a taxi is the only method of public transport that some people with mobility impairments can use, due to difficulties with other methods or modes. Indeed, in suburban and rural areas, this may be the only option for people (both with and without disabilities) who do not have access to a car. Consequently, some people with mobility impairments are more likely to require more frequent taxis and for shorter journeys.
- It is understood that some taxis and private hire cars which are engaged on contract work for Perth and Kinross Council, do not also undertake public facing hire work. i.e. the drivers of some of the vehicles which undertake contracts, such as school contracts, only undertake these contracts and do not undertake any other form or hire.
- Limited availability of licensed vehicles may be giving rise to lack of competition for some Perth and Kinross Council contracts and hence leading to inflationary pressures when pricing such contracts. The 'part time' nature of these contracts suits some drivers and is more

attractive than undertaking more numerous hires through booking circuits or from ranks.

- Council transport contracts for locations in Perth and Kinross which are outside Perth itself, are often fulfilled by Perth based operators using Perth taxis, rather than taxis licensed to operate in other parts of Perth & Kinross.
- A lot of users stick to the same company as they have had positive experience with them

Rail and other transport operators

In Perth, at the railway station, there were generally a small number of taxis which arrived at the station in advance of arriving trains. Rail staff at the station had no view regarding availability of taxis. They indicated that there were generally taxis waiting for trains when they arrived and that some people had booked a taxi in advance to meet them at the station when a train arrived.

Stagecoach buses were contacted and indicated that there were no issues with taxis.

6 Trade consultation

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.

A link to an online questionnaire was sent to members of the licensed vehicle trades. This included taxi operators and private hire car owners.

A total of 78 responses to the online questionnaire were received.

Not all respondents answer honestly. Some respondents set out to provide inputs that they believe will help to skew results towards an outcome which they would prefer. However, many other respondents to answer honestly. The data received was evaluated and those results which were intended to skew results were identified. For some of the analysis, these intentionally erroneous results were excluded.

Of those 78 responses, 70 indicated that they were taxi drivers. Subsequent responses indicated that some of those who indicated that they were taxi drivers, were in fact private hire car drivers and some were taxi drivers from other areas within Perth & Kinross.

All of the responses provided information of value. However, some responses which relate to Perth only matters were analysed on the basis of responses from Perth drivers only.

What make and model of vehicle do you drive? e.g. Toyota Prius.

82% of drivers generally drove a saloon or estate car. The remainder drove MPV or Van based vehicles.

In terms of typical hours worked, the majority of Perth taxi drivers who responded worked day time rather than night time hours.

The maximum working hours per week claimed was 168 hours. This is 24 hours per day 7 days per week. Clearly, this level of continuous working is not feasible.

Respondents were also asked how many hires they undertook per day from different sources; rank hires, pre-booked hires, contract hires and hailing. As with working hours, some respondents indicated either an excessive number of hires or no hires. These outlier results were excluded.

Once outlier data was excluded, the number of hires undertaken was plotted against the number of hours worked.

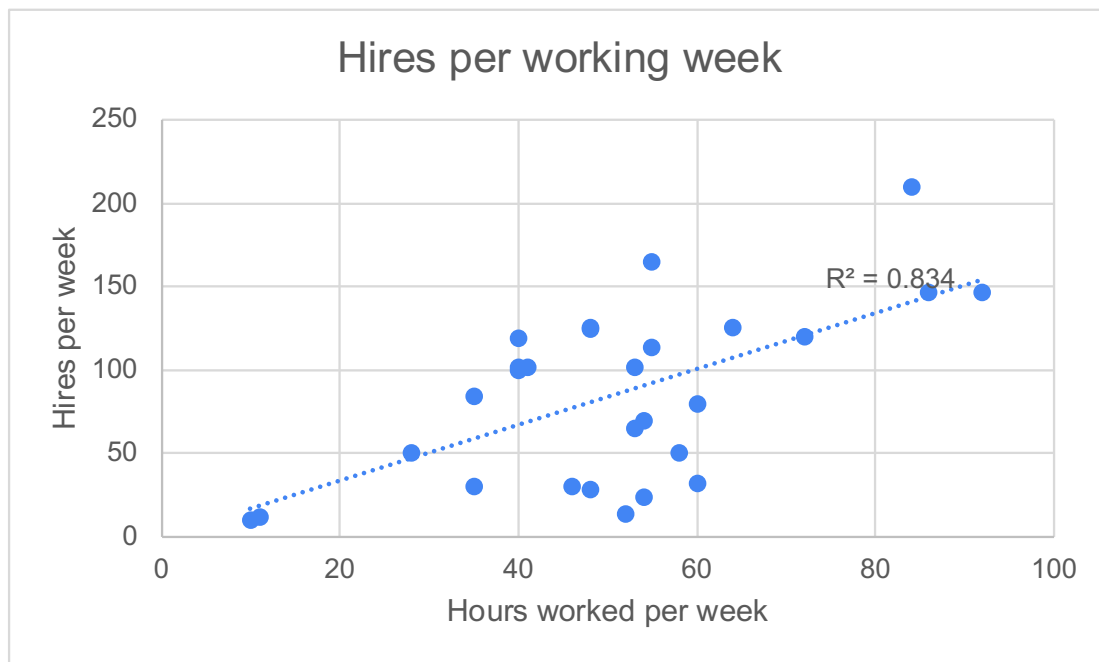


Figure 8 - Plot of hires versus hours worked

The scatter graph of hires versus hours worked resulted in a trend line of around 1.7 hires per hour.

The type of work undertaken varied amongst respondents. Some focussed on contract work or airport runs. Such work generally involves a lower frequency of hires per hour worked. Other drivers undertook a mix of pre-booked hires and rank hires which can generate a higher number of hires per hour.

Drivers were asked which type of hire best described the type of hire that they most commonly undertook. Responses indicated a mix of hire types. Around 25% primarily undertook contract or airport run type hires. Around 46% of drivers predominantly undertook hires for immediate travel. The remainder of drivers were primarily engaged undertaking pre-booked hires.

Respondents were asked how many hires each week required the carriage of a wheelchair. Around a third of taxi drivers indicated that they typically carried one or more wheelchair using passenger per week. Around half of those who carried wheelchair passengers typically carried one or two wheelchair passengers per week. However, the remaining half of respondents who carried wheelchair passengers indicated that they would undertake several trips per week, carrying wheelchair users. Around 7% of drivers carried 15 or more wheelchair users per week. The majority of wheelchair user hires were obtained by pre-booking.

Drivers were asked if they had any regular clients who used a wheelchair and any who had a mobility impairment. The majority of Perth drivers, who did not regularly carry wheelchairs also did not have any regular clients who

used wheelchairs. However, some of these respondents did have regular clients with mobility impairments.

Of the Perth drivers who did regularly carry one or more wheelchair using passengers, most had regular clients who used wheelchairs and regular clients who had a mobility impairment. Overall, around 50% of taxi drivers had regular clients who had a mobility impairment.

Respondents were asked **if the vehicle that they normally drove, was normally driven by more than one driver.** 35% of drivers indicated that the vehicle they normally drove, was also driven by another driver.

Respondents were asked **if any existing ranks needed improvement.** Responses included the following statements:

The railway station rank has special arrangements but I would like to have access to it

Re-site the South Street rank opposite side of street, reinstate the other South Street rank. Do away with the bus station rank. Open up the Scotrail rank to all taxis and make a deal with Scotrail as it is a private rank and you have to pay for the privilege to use it.

South street rank, needs to be moved back so the first taxi is facing Tesco main door

An extra couple of spaces on each

Not enough spaces for taxis , South St rank needs to be moved so front of rank is at Tesco's door , to stop customers jumping in back taxi leaving taxi at front of queue waiting

Needs to be more rank space for a start. 75 cars into 29 spaces does not go. Drivers do not want to drive rank cars and prefer pre booked hires as the anti social behaviour around ranks is terrible. Positioning and rank space is something i was undertaken with licensing as chair of the taxi association. Whilst they are sympathetic the block seems to be the PKC roads department. Police and wardens need to manage the anti social behaviour around the ranks by drug addicts , old people do not feel safe and prefer to book by phone and be collected at a suitable place.

Murray Street.....Improved safety for drivers perhaps stewarding at peak times.

Do any new ranks need to be established? If so, where should they be located and why?

There aren't many suitable places around town but I would assume that a wee 3 car rank at the back of m&s would be beneficial

Hospital so people can come out and get one right away

possibly Bertha Park a small rank

Outside the loft nightclub, broxden park and ride,

Yes. As before, Broxden and scott street/kinoull st.

By the concert hall

In my personal opinion. I feel there should perhaps be a rank at supermarkets, like Asda, Tesco etc.

A rank beside the new Museum would be good, there are lots of entertainment venues there

Broxden park n ride. Much more customers use this facility than bus station. Bertha park. Covers a vast area on the outskirts with massive new housing developments

One at the retail park for shoppers

The top of the hill at the front door of the PRI can be difficult to access and there is no parking for taxis

Yes south st between south methven st and scott st

Railway station, broxden bus station, hospital

Outside Asda and both main Tesco's should be considered. There is currently very poor drop off and collect facilities at all these sites

broxden park and ride, and perth royal infirmary

Broxden park and ride. New museum a drop off and pick up point.

Proper drop off and pick up point Broxden Park and Ride beside the bus stops at the low level car park otherwise cant think of anywhere else

Asda and crieff road tesco need rank

A rank at George Street/ High Street would be useful as there is no rank in that area for potential customers.

Are you aware of any times or locations where members of the public may face difficulties hiring a taxi?

There seems to be a short supply when the school runs are on.

Yes. Late weekends. Dont feel safe driving/on streets after dark anymore.

School contract time. At weekend night's because the custom is not there except at peak periods so not worth working

Not seen a lot of queues at mill street compared to years ago. This is because people are booking their taxi home in advance to avoid walking to the rank. Being picked up from a bar or restaurant for example

Morning rush hour. Taxis busy on school contracts.

SATURDAY 23.00-0100

not nowadays, Saturday night maybe after rewind festival only

School contract hours

During school times

Murray street rank, south street rank, bus station rank

During school times and night time

school contract times during term

Friday night, Saturday night.

Saturday night between 12.30/1.30am

Between 830-930 am due to contracts . Many private individuals have contracts now for WAVS etc . On a Friday maybe a Saturday night between 1130 - 1am it can be busy but rest of night is quiet. If we put more cars on we dilute the income and less drivers will work . It is a vicious circle.

8.30-09.30—14.30-15.30

school contract times

Sometimes around about 9.00 am and at around about 3 pm when taxis are completing school contracts during term time.

Tesco South Street, undesirable people congregating drinking alcohol and consuming and dealing illicit substances.

During school time on all ranks

No

After 18.00 on Thurs, Fri, Sat Sun all day

during council contract times , morning /afternoon

School contract times-offices refuse work as a rule. Evenings and weekends generally

Between 2200 and 0100 on Saturdays

At school contract time.

Taxi offices refuse to pick up customers during school contract times

Do you feel that the level of customer care and service quality from taxi drivers in general in Perth is satisfactory?

81% of respondents said yes.

Do you agree or disagree with the following statements?

Statement	Strongly agree	Somewhat agree	No opinion / neutral	Somewhat disagree	Strongly disagree
There are not enough taxis licensed in Perth to cater for demand	18.9%	6.8%	16.2%	13.5%	44.6%
There are not enough taxi drivers working in Perth	35.1%	16.2%	17.6%	17.6%	13.5%
Some taxis rarely work from the ranks	26.7%	26.7%	26.7%	10.7%	9.3%
It is rare that passengers have to wait at ranks for taxis to arrive	24.7%	23.3%	26.0%	9.6%	16.4%
Apart from peak times late at night, it is rare to see passenger queues at the ranks.	46.6%	16.4%	24.7%	2.7%	9.6%
There is not enough demand to keep all taxis working full time	42.7%	25.3%	20.0%	4.0%	8.0%
There are too many taxis in Perth	20.0%	12.0%	42.7%	6.7%	18.7%

Could you tell us how you feel licensed vehicle demand is likely to change or develop over the next 12 months? For example, increased use of telephone bookings, fewer business trips etc.

Responses included the following representative statements:

More secure payment methods. Coping with roadworks (diversions) and closures information

All round drop in trade. I cant see myself driving taxis in 12 months time due to lack of income.

It's not going to change unless PKC broaden their way of thinking. There is nothing to entice people into the city centre. Do away with alcohol and unit pricing and people will go out.

Seems to be much the same over the last few years and don't see it changing. If anything it is getting quieter and less busy due to the cost of

living and the prices that bars and restaurants have to charge to survive. Don't see any change in business airport runs. Same people using taxis to airports etc

Increased use of telephone and on-line bookings. Demand has stabilised post COVID and expected to continue at the current level for the next 12 months.

Impossible to predict

More bookings

domestic trade within the city will continue to dwindle and long run agency work will make it viable for drivers

Think younger people use apps for most things so be online bookings

More business runs

increase phone bookings

the demand is likely to increase as Perth is rapidly growing and is used as a centre point for business users and tourists alike, google plays a massive part in this and for me telephone bookings and or internet bookings are increasing, mainly due to the lack of taxis at key areas such as the railway station and the park and ride

More telephone bookings

There are more houses being built and therefore more people. However, there are changing habits in going out etc. We find a lot of people take personal cars and do not drink. The public have changed a lot of habits due to the bus services finishing earlier and we can often have a busier night on a Monday or Tuesday if football is on TV than a weekend . Definite change in habits of socialising.

More app bookings

More mobile

Wont change

Increased telephone bookings

More online bookings

Increase use of telephone bookings.

Few business trips less busy

More work coming in on telephone calls, the city is expanding but the increase of taxis is static.

Fewer business trips.

Mobile apps, increased population, improved road infrastructure

Increase in price and availability of public transport

With the cost of living going up and up, there could be a decrease in people using taxis.

The trade is still trying to build up to pre covid levels ,customer base is smaller as part of the covid and cost of living crisis, a few drivers got other jobs during covid and still haven't been replaced

I will increase on all counts, the town is growing therefore the demand will grow.

i think people more use telephone booking then rank

Economy & price increases

More people are using apps to book taxis and demand will increase

I personally think demand will continue to decrease across all forms of hire. Perth town centre is no longer a place to meet or shop. The standard of hotels does not encourage short breaks or any form of tourism. The general public do not come in to town anymore due mostly to the lack of any quality shops and the councils inability to move on beggars , drunks and those under the influence of drugs

Less people going out into town, pubs quieter especially midweek.

Is there anything else you would like to tell us about the licensed vehicle trade?

There is a need for ongoing training for drivers, but achieving that without disenfranchising drivers is very difficult.

The trade could probably do with a few more drivers, i think there's plenty licensed taxis in Perth, just not enough drivers to drive them all.

The issues I keep hearing from customers are cars being late or last minute cancelled, unavailable for long times when needed asap, sometimes rude dispatch or driver

The application process for school contracts should also be accessible to small local businesses. The process itself is unclear, the website looks outdated and is very unintuitive

Pay drivers a wage not self-employed

We need to have more control on the way the cars are displaying private hire badges on door panels

There only few yellow plates in this area and most of them owned by fewer people it should be distributed among the driver whose always willing to work that's will help customers to get easy access to taxis

It would be nice if the licensing staff were out more at nights to check on dress codes and conditions of the inside of some cars my daughter jumped out of one from the rank as the car was stinking of cigarette smoke. Also, some private hire drivers doing food deliveries so the cars are stinking of food.

More support given to drivers when complaints from the public received. Most complaints are very one sided.

Not well enough paid. Working for less than minimal wage.

Not enough enforcement. Dundee and Edinburgh cars picking up lots of trade via uber app, carding while delivering parcels and poaching

Yes still too many drivers not displaying their badge so passengers can't identify them

There are currently a lot of taxis parked up, with some offices more than 29 taxis parked with no one to drive them.

Need more hackneys...Private hire is saturated

Maybe open up yellow plates

There are more than enough cars but a lack of drivers. Policing is terrible and this contributes to less people feeling safe in Perth late at night. Youngsters seem to roam the town at all hours. More needs to be done to protect drivers from taxi fraud and runners. Police do not have the time or resources and all too often nothing happens so drivers do not report this as it will cost them more time and money. There is a definite fractured relationship between licensing and the trade and this needs to be repaired

All too often we hear about the wheelchair access trade but these customers are very selective in their comments. They have no longer wait or discrimination than other users , they simply do not book in advance , preferring to call on spec and having to wait 10-20 minutes . We need more drivers and we can get more cars driving.

While not perfect, generally high level of efficiency and quality to meet current and immediate future demands within Perth city and Perthshire

As a private hire I am not allowed to take flag downs or sit on a rank. Frequently I would be able to take fares if allowed. After all yellow plates Frequently steal our fares.

Driver long hours to make a living. Dangerous !!!

Customers are usually supportive

People should stop abusing drivers

Too many business people, outwith the taxi trade, own or are registered as taxi plate operators and sub lease to actual drivers.

Far too many scruffy taxi drivers

An MOT every 3 months for a 7-10 year old vehicle is excessive

The new museum has generated some additional fares - £4.20ish from the station - and a driver would have to do 40 such runs a shift, if it were possible, to get anywhere near minimum wage;

It would help IF ALL yellow plated cars were actually out working.

Why are there so many "licensed" public hire vehicles parked up at peak times. Time to open the trade up to cover demand.

There is a complete lack of wheelchair accessible taxis available , also there are many taxis that are solely used for contract work or only work Monday to Friday during the day as the operator is older and does not want to work at any other time, there is an issue that because taxi licences have a perceived value that many operators have several taxi licenses but don't actually have those vehicles doing any rank based work

There's plenty Hackney plates in use, but the majority are working in the three main offices and being used as office cars hence the reason they are not using the ranks

It can be a stressful job at times and to consider some way of increasing taxis in Perth would put a lot more pressure on present Perth taxi drivers and taxi businesses.

Vehicles in poor condition and drivers not dressed appropriately

As licence driver its very hard to make money now days specially after covid. Thats why lots of driver left this professional

And the final question, are there any other comments that you would like to make?

Scrap the monopolies the major companies have. Create one company with driver ownership and run it as a fair place to work. Perth is not big enough to sustain the amount of taxis. Increase Hackney plates numbers and reduce private hire, transfer contract only from excess private hire

I personally think the Licensing board should do more spot checks on taxis day and night cars to make sure cars are always being kept to a high standard of cleanliness and tidiness.

I started a year ago and when I did the driver examination I thought it was an unnecessary barrier to entry. Once I'd done it, I thought it was useful training and I've continued to use what I learned.

Just tighten up on some drivers driving too many hours 1 guy I know is out most mornings and is still out at 2-4 am the next morning it's shocking and his level of driving is really worrying too.

Make owner operators work the taxi they own either day or night and not just sit back and benefit by cashing in on having others working hard. My 2 cars are out 5 days from 8 till 6. I go out from 7 till 10 others don't even do 1 hires rank work because of a massive contract. All wrong and that's the issue. Drivers don't want to work then hand 50% of the earning to someone else. I have 70 -30 split so they're working for themselves. Given 50% is not what self employed is about

To be paid the minimum hourly wage as basic income.

Plenty of taxis parked up as there are no drivers

The statistical questions in this survey are nonsensical, what were the cameras for? Would they not provide the information you are looking for?

Until the trade can attract more drivers we will continue to struggle to provide the service the public deserves, we have 3 taxis, 2 of which are parked up at night, 7 nights a week. There are plenty of licenced vehicles available but not enough competent drivers about to drive them.

Make it easier to buy plates

Poor driver standards

The sooner they remove the cap from taxi operator licenses the better as you will then get owner operators who actually want to provide a service to the general public, rather than those who pay the required fee and then rent that license out at £150 per week

The last 5 plates you issued 4 are on minibuses and only do school contracts, therefore are unavailable for rank work.

More ranks- not nearly enough

More drivers means more cars will be working

Easier application process

Driver Testing Abolished in favour of interview with licensing staff

More spot checks on driver appearance and cars checked at random

Reintroduce annual testing of cars - new system too cumbersome and impractical

Licensing department to be easier to contact or speak to

Promote the trade more positively- we have canvassed for a long time for WAV only ranks and this should be promoted by the city and council as a benefit to visitors

Need a union

Scrap the knowledge test to attract new driver

Taxis picking fares on rank in any position on the rank rather than FIRST TAXI , this can cause friction among drivers and effects drivers that may have been waiting quite a long time for a hire.

Private hire picking up off street

Private hire taxis are picking up from the streets

There has to be better control of the way cars get licences and I think there should be follow up inspections for all cars

It's not lack of taxis , it's lack of drivers to drive that is the issue. So more taxis would not solve any issues.

I would like to see more access to P&K team at High Street, very hard to get a hold of

There should be a limit to hours taxi drivers work as seen some working double shifts

Edinburgh plated cars are driving about Perth looking for work and the licensing board don't seem to stop them and ask why they are in Perth

Support the drivers in your city and encourage new drivers.

I feel that it is a difficult balance between too many taxis at quieter times and not enough during busy times. I am a private operator and have been driving on my own since covid and cannot get another driver to share due to rank cars being available (Thursday, Friday, Saturday nights).

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 Taxi rank and finds there is no vehicle there available for immediate hire. This can lead to a queue of people building up, some of whom may walk off, whilst others will wait until a vehicle collects them.

There are other instances where a queue of passengers can be observed at a Taxi rank, whilst a queue of Taxis is present, waiting to pick up passengers. 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 subsequently adopted by consultants undertaking the surveys made necessary to enable authorities to retain their limit on Taxi vehicle numbers. The index has been developed 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 Taxis 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 Taxi 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 Taxis.

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

There can be special cases where summer demand needs to be covered, although high peaks for tourist traffic use of Taxis 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 peak hours a week.

The latent demand factor was added following a court case. It comes from asking people in the public consultation questionnaires if they have ever given up waiting for a Taxi at a rank in any part of the area, together with any observation of passengers who had waited at a rank, then given up waiting before a taxi arrived. 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 Taxi rank waits as some, for example, despite careful questioning, quote giving up waiting at home, which must be for a pre-booked hire, 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.

ISUD value, Perth

For the 2024 survey, average passenger delay was 1.23 minutes (1 minute 14 seconds), this compares with the 2021 survey, when the average passenger delay was 2.17 minutes (2 minutes 10 seconds).

Periods when passengers had to wait for a taxi to arrive at the rank amounted to 25.3% of weekday off peak hours. This compares with the 2017 survey result, which was 16.9% of the observed off peaks hours.

40 % of passengers travelled in hours when there was an average wait of over a minute.

The demand profile did not exhibit highly peaked demand, resulting in a factor of 1.0 being used.

The seasonal factor is 1.0.

The latent demand factor was 1.722

The resultant **ISUD** value of **2,143.5** is significantly greater than the value of 80 that would suggest the observed unmet demand might be significant. Consequently, this suggests that there is **significant unmet demand**.

The result indicates that there are not sufficient taxis available at the taxi ranks or by hailing, to satisfy demand and avoid the need for intending passengers to wait for extended periods to hire a taxi at a rank or by hailing.

The 2024 survey ISUD components are summarised in the following table.

Table 4 2024 ISUD Components

ISUD component	Perth
Average passenger delay	1.23
Off peak hours with observed waiting	25.3
% of passengers travelling in hours with average queue over a minute	40.0
Seasonal factor	1.0
Peak factor	1.0
Latent demand factor	1.722
ISUD Calculated Value	2,143.5

Railway Statistics

Some demand for licensed vehicles is related to rail passenger volumes. Where rail passenger volume changes, we would expect to observe some related change in associated use of licensed vehicles by rail passengers.



Figure 9 - Annual passenger movements at principal Railway Stations

Data is available for annual passenger numbers each year, from April to March the following year. Data is presented for each year, from 2009 to 2024.

Passenger volumes in 2024 have not recovered to pre-Covid levels.

8 Summary and study conclusions

Level of unmet demand

The ISUD index should not be taken in isolation as definitive evidence of the level of unmet demand.

The high index value does indeed suggest that the level of unmet demand is significant. This indicator was strongly corroborated by feedback from the public and from stakeholders.

If passenger waiting were limited to periods of peak demand, such as on Friday and Saturday nights, then the coefficient in the ISUD calculation which related to passenger queuing during off peak weekday periods, would have been significantly lower. However, passenger waiting was in evidence during weekday off peak periods as well as during peak periods. This extended profile of passenger waiting also suggests an undersupply of taxis over extended period, rather than focussed on peak periods.

The profile of rank usage, reflected in the profile of taxis leaving the ranks with passengers, is relatively flat during Friday and Saturday nights. However, passenger waiting increased during the traditional peak periods. The passenger waiting peak suggests that there were peaks in demand during Friday and Saturday nights, however, the level of supply did not rise to meet that demand.

The evidence from different sources does corroborate the result of the ISUD calculation, leading to the conclusion that the level of **unmet demand for taxis is significant**.

Evaluation of results

The level of provision of taxi services at taxi ranks is dependent on several key factors. These are:

- The number of taxis licensed.
- The number of drivers who are driving the taxi vehicles.
- The times that drivers are working
- The type of hires which taxis/drivers are fulfilling

There are scenarios where the level of taxi availability at ranks could increase, with no increase in the number of taxis which are licensed. Similarly, there are scenarios where the level of taxi availability at ranks may not increase, even with an increase in the number of taxis licensed.

Feedback from public consultation indicated the view from some members of the public, that the Council have direct input and control over how taxis are operated. This is not the case. Whilst the Council may grant a right for specific vehicles to operate as taxis and may grant the right for specific

people to drive taxis, there is no control over when the taxis would be operated or indeed the type of hires which would be undertaken by taxis.

In most of Perth & Kinross, the number of taxis licensed to operate is not limited. The operation of taxis in Perth & Kinross, outside Perth itself, is subject to market forces and access to the market is unrestricted, subject to applicants meeting licensing conditions.

Within Perth itself, there is a cap on the number of taxis which are licensed. The implementation of a cap on the number of taxi licences issued, is often held to be of benefit to the travelling public, as it ensures that the level of provision is not excessive during off peak period and that driver earnings would be of a sufficient level to encourage longer service in the trade. Such traits are expected, in turn, to lead to greater levels of experience and professionalism and higher levels of service than may otherwise be expected.

When we compare the results of the last unmet demand survey, prior to the Covid-19 epidemic (in 2017), with the latest 2024 survey, we can see that the volume of taxi hires obtained from the ranks in Perth was lower in 2024 than it was in 2017.

Passenger waiting observed in 2024 was significantly greater than passenger waiting observed in 2017.

Despite these contrary indicators, the number of taxis licensed in Perth has increased since 2017.

The traditional approach to addressing levels of unmet demand for taxis which is significant, is to issue more taxi licences. However, there are more licences in operation in 2024 than there were in 2017 and despite lower levels of rank based hires observed in 2024, the level of unmet demand is higher in 2024.

There was a high level of suppressed or latent demand indicated in the feedback from the public. i.e. if there were more taxis readily available at the ranks, more people would use the taxis to be found at the ranks.

The majority of licensed vehicle hires undertaken by the public are booked hires, rather than hires obtained at taxi ranks. Feedback from the trade indicates that most taxi hires are obtained through pre-booking rather than from ranks. The level of hires obtained from pre-booking appears to have increased since before the Covid-19 pandemic.

It seems plausible that changes in operating practices amongst the trade, coupled with changes in patterns of demand, have both influenced the level of availability of taxis at ranks. Whilst taxis are engaged on pre-booked hires, they are less likely to visit ranks. This is especially likely during busy periods when they may be engaged in a sequence of back-to-back pre-booked hires, without the opportunity to visit the ranks between hires.

As more taxis engaged in pre-booked hires in recent years, passengers used this facility more readily.

Some of the feedback from public consultation included comments from people stating that they had to book a licensed vehicle by phone or app, because there were no taxis operating from the ranks, because many of the taxis were fulfilling these pre-booked hires. The implication from some of these comments was that the respondents would prefer to just go to a rank rather than have to book a taxi. However, this preference may be related to an expectation that booking a taxi involves a wait for the taxi to arrive, whilst if there were taxis waiting at a rank, there would be less waiting time. Consequently, if bookings were fulfilled within a short time period (less than 5 minutes) passengers may be less willing to walk to a rank rather than pre-book a taxi.

The feedback from the public indicated that under supply of licensed vehicles was an issue with pre-booked hire of licensed vehicles, for immediate hire, as well as an issue with taxi availability at ranks. If there was a significant increase in licensed vehicles available to pre-book, it is likely that this increase in capacity would fulfil some of the unmet demand for taxis at the taxi ranks.

It is tempting to assume that all the taxis in the fleet are primarily engaged in public facing hire work, either from taxi ranks or through pre-booked hires. However, there is some plausible evidence that some taxis are normally engaged in undertaking contract hires and do not supplement this work with public facing hire work.

There is some suggestion from the trade that some taxis are not in regular operation. This suggestion is based on a case that these taxis are rented to drivers and fares are split with the taxi owner and that there are insufficient drivers available and willing to pay the rent for the taxis. It was not possible to verify this situation. However, if true, this would be a plausible contribution to the lack of supply at taxi ranks, despite the increase in licensed taxis in recent years.

The purpose of this survey is to identify whether there is sufficient availability of taxis at the ranks to meet the level of demand.

The result of the survey is a clear indication that there is not sufficient availability of taxis at the taxi ranks, to meet demand.

The number of hires obtained from ranks has fallen dramatically since 2017. The hires observed at ranks in 2024 were around 48% of the level observed in 2017. The number of taxis in the fleet has increased by 6.7%. Despite more taxis and less hires taking place at ranks, the number of people who had to wait for taxis to arrive at the ranks had increased by 108%.

Clearly, the way in which taxis operate has changed. The way in which people hire licensed vehicles has also changed, with more people pre-booking hires for immediate travel.

The situation in 2024, compared with 2017, was that use of the ranks has reduced, passenger waiting has increased and the number of taxis in the fleet has increased, but the increase has not addressed the increased passenger waiting and hence the level of unmet demand is significant.

Consideration of potential measures

Perth & Kinross Council need to consider potential measures to address the lack of availability of taxis at ranks. However, the range of potential measures which could be applied is relatively limited.

Measures could include actions and initiatives to encourage some of the following outcomes:

- Increase the number of taxis which are licensed
- Increase the number of taxis which operate from the ranks
- Change the mix of pre-booked hires and rank based hires, in favour of rank operation.
- Increase the number of drivers who drive taxis and attend ranks.
- Increase the number of hours each week when existing taxis are operating, through measures such as multi-shift usage, or encouraging part-time drivers to work full time.

If more taxi licences are issued in the future, it would be highly unlikely that all of these taxis would operate from the ranks.

If three additional taxis were to work from the ranks on Friday and Saturday nights and one additional taxi were to operate from the ranks during weekdays and weekend day times, this would provide sufficient additional capacity to reduce the level of unmet demand to a level which is not significant. However, this assessment assumes that the level of demand from passengers at the ranks would not increase, as a result of increased availability.

It is highly unlikely that if four additional licences were issued, they would be operated as taxis which worked solely from the ranks.

It is also unlikely that demand levels would remain static, if provision at the ranks were to be increased.

In order to provide an equivalent of three additional taxis during night time peaks, we need to consider how this could be achieved. As operational practices vary regarding how taxis obtain hires, we would need to scale provision to achieve the equivalent of three extra taxis working from the ranks on Friday and Saturday nights.

We need to consider how to scale the fleet size, in order that the observed equivalent number of taxis operating from the ranks on Friday and Saturday night, were to increase by 3.

Evaluation of the rank activity indicated that on Friday and Saturday nights, around 8 taxis on Friday and 10 taxis on Saturday were operating from the ranks. These are equivalences calculated from observed data. In reality, there were more taxis operating on Friday and Saturday nights during the rank surveys. However, some of those taxis which attended the ranks also undertook pre-booked hires and so were only in attendance at the ranks part time. Hence, the level of provision on Friday and Saturday nights was equivalent to 8 taxis on Friday and 10 taxis on Saturday working solely from the ranks and not undertaking other types of hires.

An increase of three taxis (equivalent) on Saturday night would require a 30% increase in provision, if it were assumed that taxis (including those newly licensed) would continue to be operated in the same way as they were during the rank surveys. i.e. some taxis focussing on pre-booked hires, some on a mix of pre-booked and rank based hires and some focusing on contract hires and perhaps some not working at all but waiting, ready for new drivers to work the taxis on a rental and shared fares basis. Therefore, we would need to increase the size of the taxi fleet by 30% in order that the mix of operational practices could result in a 30% increase in provision at the ranks.

If we were to increase the taxi fleet by 30% this would be an increase of 24 licences.

If 24 licences were to be made available, the take up of some of the licences would be by existing drivers of private hire cars and existing taxi drivers, who don't own their own taxi. As such, unless more drivers could be recruited by the owners of the vehicles previously driven by these drivers, the transfer of existing drivers would reduce the net gain in provision and hence capacity at ranks.

If 24 licences were issued and taken up, it is likely that some of the licences would be taken up by people who previously operated private hire cars. As such, if private hire cars were re-plated with a taxi plates, there may be no net gain in capacity with those specific plates, if the taxis then continued to fulfil the pre-booked hires that the vehicles previously fulfilled as private hire cars.

If the licence cap were increased by 24 in a single move, it may be that not all licences are initially taken up. In such a situation, it may be considered that the difference between having a cap level above the number of licences issued is no different to removing the cap altogether. However, there may be some practical differences in terms of how people view existing licences against a potential new licence.

Trade feedback indicated that there is a perceived notional value in holding a taxi licence and a business, including the taxi licence can be sold. The value of the business to be transferred would include a 'plate value' premium. If the licence cap were removed and no vehicle conditions applied to any new licences, the plate value of existing plates would be likely to be reduced to zero. This may discourage operators from retaining licenced taxis which are not in regular use.

An alternative scenario could be that the cap on licences were removed, but vehicle conditions applied to any new licences, that they would need to be for wheelchair accessible taxis. In such a scenario, existing plates which retained 'grandfather rights' to be operated without the need to be wheelchair accessible, would retain a value. However, such a value would be contingent on whether these grandfather rights could be transferred, with the sale of the business and transfer of the licence.

A further alternative scenario could be that the cap on licences were removed and any new licences or transferred licences would need to be wheelchair accessible vehicles. In this scenario, existing licence holders (of licences which did not require operation of wheelchair accessible vehicles) could continue to operate as such, so long as the licence holder continued to operate the licence. Under this scenario, licences owned by individual owner / drivers would eventually be transferred once the owner retired from the trade. Then the licence would need to operate a wheelchair accessible vehicle. However, if a licence were registered with a company, then potentially, 'ownership' of the licence could be transferred with the company, without the need to transfer to a new licence holder. Such licences could potentially continue in perpetuity to exercise grandfather rights to operate non-wheelchair accessible vehicles.

Wheelchair accessible vehicles are more expensive to own and operate than saloon cars and hence, operation of a cheaper saloon car taxi is a preferable option for some operators, as taxi fares are fixed, irrespective of the size and cost of the vehicle used.

For various reasons, the level of use of taxi ranks to hire taxis has fallen since 2017. If the number of taxis were to be increased by 30% to cater for this lower level of usage, there would inevitably be an impact on other aspects of the licensed vehicle trade in Perth.

The type of existing taxi ownership will also influence the effectiveness of introducing additional taxi licences. For example, companies which own multiple vehicles and rent these to drivers, may find some difficulty in recruiting new drivers, if some of the existing drivers take up a new licence. Alternatively, renting a taxi provides a means of access to the trade for people who do not have the capital to invest in a vehicle, so if some or all newly introduced licences were taken up by existing fleets, this could

provide an avenue for more drivers to join the trade with low levels of investment.

In reality, the introduction of such a large increase in taxi licences would have an impact on the trade which would be difficult to predict.

If the introduction of a large number of licences is considered, it is also worth considering whether there is a realistic difference between a large release of licences or removing the cap altogether.

Disabled users and the need for wheelchair accessible taxis

Whilst the public in general has faced difficulty in reliably obtaining licensed vehicle services, disabled users and in particular wheelchair users continue to face increased difficulties, over and above those faced by non-disabled passengers. Increased availability of wheelchair accessible taxis and private hire cars has been called for by the public. One measure which can increase wheelchair accessible vehicle provision, is to have a requirement that any additional licences should be for wheelchair accessible vehicles only.

The cost of purchasing or leasing and subsequently operating a wheelchair accessible vehicle can be significantly higher than the equivalent costs for operating a saloon car as a taxi. Therefore, a wheelchair accessible vehicle condition for any new licences may discourage some potential applicants.

Most journeys in a wheelchair accessible licensed vehicle are pre-booked. Rank based hires of wheelchair accessible taxis are relatively rare. A common issue with obtaining the service of wheelchair accessible taxis, in some locations, is that few of the taxis are directly contactable by wheelchair users, in order to book travel. In Perth, this is likely to be less of an issue as many of the existing taxis obtain pre-booked hires, through a booking office, app based system, or directly by telephone or messaging contact between passengers and drivers.

Feedback from stakeholders and trade members indicates that some of the wheelchair accessible taxis most recently licensed in Perth are predominantly or solely engaged in contract hire work and don't provide any service at taxi ranks. Potentially, some additional licences issued could be deployed in the same way.

If we consider measures which may:

- Change the mix of pre-booked hires and rank based hires, in favour of rank operation.
- Increase the number of drivers who drive taxis and attend ranks.
- Increase the number of hours each week when existing taxis are operating, through measures such as multi-shift usage, or encouraging part-time drivers to work full time.

The only realistically feasible measure which may result in the outcomes above, would be to increase the driver's income. In turn, this is likely to be achievable only by considering changes to the fares tariff. Taxi fares are outside the scope of this survey and are not considered further.

In order to increase the number of taxis which attend ranks, if driver operational patterns are not changed, then more taxi vehicle licences would need to be issued. It would be assumed that some of these additional licences would operate for at least some of the time, from ranks and that some new licences would attract new drivers into the trade, either directly or indirectly.

If more licences are to be issued, the question of how many and whether they should be required to be wheelchair accessible taxis should be considered.

Some of the most recently issued licences are required to operate wheelchair accessible taxis. Therefore, if a significant number of new licences were issued, which did not have this requirement, then existing holders of the newest licences may feel aggrieved. Some holders of wheelchair accessible vehicle licences could apply for a new un-restricted licence and hand in an existing licence with a wheelchair accessible vehicle requirement. Realistically, any additional licences would probably need to be issued with a condition that vehicles require to be approved wheelchair accessible vehicles.

There is an option of making no changes and letting market forces deal with demand for licensed vehicles.

In such a scenario, it would be anticipated that, over time, more private hire cars would be licensed to deal with the excess level of demand for pre-booked hires.

If the size of the private hire fleet were to increase, more travellers would book travel rather than go to taxi ranks. The resulting increase in private hire cars may drive more of the taxi fleet back to the ranks, owing to increased competition for pre-booked hires.

At present, there is no realistically feasible method of predicting how long it would take for private hire numbers to increase sufficiently.

An alternative to increasing the cap in licence numbers would be to remove the cap altogether. The results are likely to be similar to retaining the cap with a large increase. However, if the cap is removed, it can be difficult to re-introduce a cap in the future if it is felt that a new cap is required.

9 Recommendations

On the basis of the evidence gathered, our key conclusion is that there was evidence that there was unmet demand for the services of Taxis, which was above the level which is significant. It is prudent to consider measures to be implemented.

In order to address unmet demand and increase the level of availability of taxis, the only measures open to the licensing authority (The Council) are to consider increasing the number of taxis licensed in Perth.

In order to comply with existing policy, it is likely that any additional taxis licensed, would be wheelchair accessible taxis.

The level of observed passenger waiting was relatively high. The number of additional taxis required to address unmet demand would equate to a significant increase in the fleet size.

If no changes to operational patterns were made as a result of increasing the number of licences then 24 additional licences would be required.

Owing to the uncertainty of how newly licensed taxis would be operated, it is prudent to consider a range of potential additional licences to be issued. This would offer the flexibility to introduce the lower end of the range initially and, if these additional licences did not lead to a notable reduction in passenger waiting, then an additional phase of licence release could be implemented.

It is recommended that the issue of an additional 24 licences, over and above those already in circulation, is considered at this time, with the option to release licences in phases.