



Taxi Unmet Demand Survey

**Perth & Blairgowrie
January 2022**



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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 two areas. The current limit is set at 70 taxi vehicles in Perth (currently 75 in circulation) and 12 taxi vehicles in Blairgowrie.

The survey was commissioned in July 2020, during the Covid-19 pandemic. At the time of commission, measures to mitigate the transmission of Covid were being relaxed and hospitality premises were reopening, albeit with social distancing restrictions in place. Some of the work was able to commence at this stage, led by online public consultation.

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.

Taxi rank observation surveys were originally programmed to take place during October 2020. However, owing to implementation of Covid-19 lockdown conditions, which required licensed premises to close early, it was agreed that the rank surveys should be postponed until conditions were more suitable. Following relaxation of lockdown conditions, surveys were undertaken at taxi ranks in Perth and Blairgowrie, over three days, from Thursday 10th June 2021 to the early hours of Sunday the 13th June 2021. Video cameras were used to record activity at the taxi ranks during this period and the levels of activity during active periods were tabulated and analysed.

The relative levels of activity at the ranks are presented in the following figures.

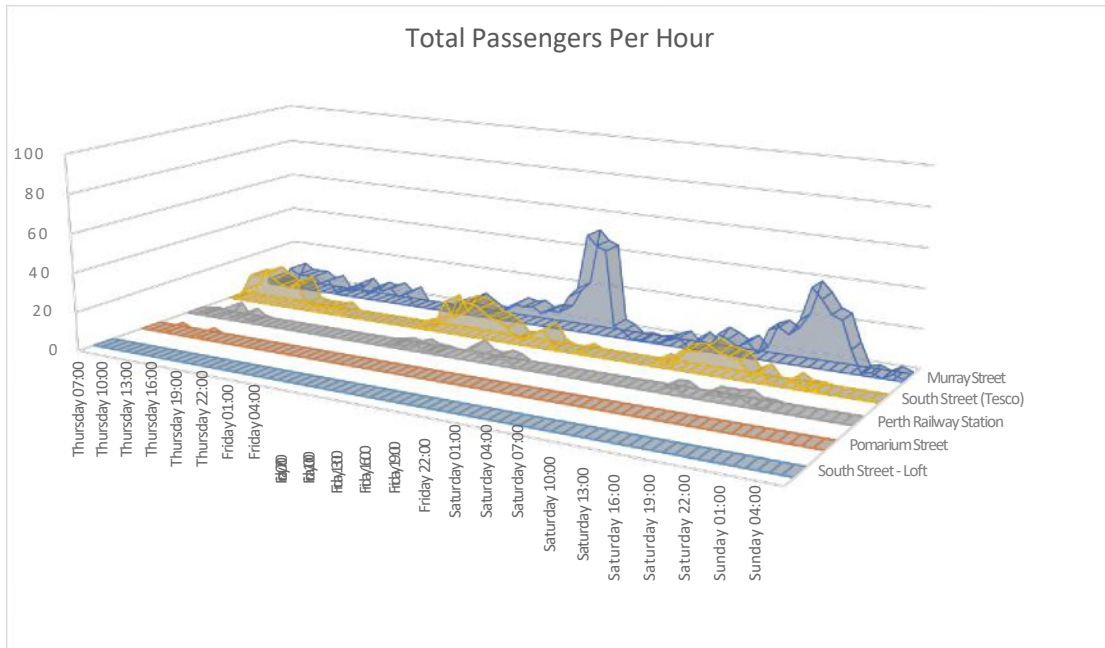


Figure 1 - Passenger volumes through ranks in Perth

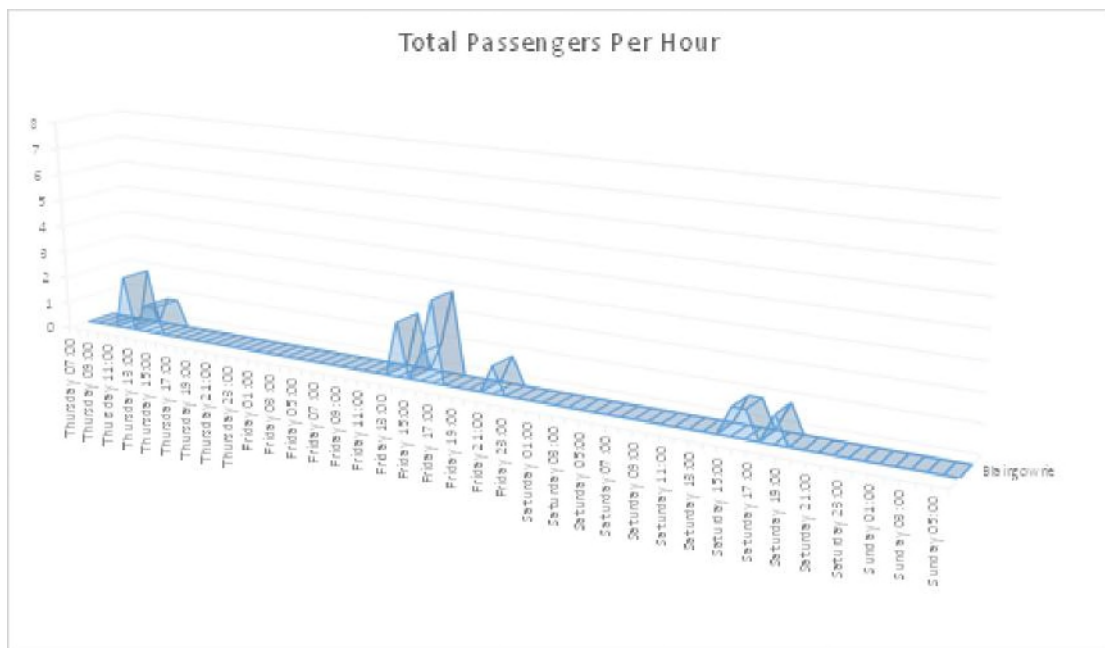


Figure 2 - Passenger volumes through the rank in Blairgowrie

The observations from the taxi rank surveys indicated that the number of passengers using taxi ranks was lower than observed during similar surveys in 2017.

During the 2021 survey, 1,095 passengers were observed. This figure was significantly lower than the 2,730 passengers observed during the 2017 survey.

The number of private hire cars and taxis which were actively working during the 2021 survey appeared to be lower than the number active during the 2017 survey.

The capacity of licensed vehicles to meet passenger demand relates to both the number of licensed vehicles and the number of drivers licensed to drive them. Some licensed vehicles may cover in excess of 60,000 miles per year, with multiple drivers operating the vehicle for multiple shifts around the clock, 7 days per week.

Some of the vehicles in the private hire car fleet have reduced the level of operation. Licensed vehicle drivers have left the trade, either temporarily or permanently. This has affected both taxis and private hire cars.

The majority of taxi hires, in Perth and Blairgowrie, were pre-booked hires. In Blairgowrie, 80% of taxis observed at the rank, left the rank without a passenger. In Perth, 40% of taxis observed at the ranks left without passengers. These proportions were higher than observed in 2017 (Blairgowrie 49%, Perth 24%). The majority of empty taxi departures were likely to be in response to bookings received.

The prevalence of pre-booked hires amongst the taxi fleet appears to have had a detrimental impact on the level of availability of taxis at the ranks, during periods of higher demand.

Lack of available licensed taxi drivers also appears to have had an impact on the availability of both taxis and private hire vehicles.

Although passenger volumes at the ranks were significantly lower than those observed during the 2017 survey, the level of passenger waiting was significantly higher.

Average passenger waiting times at the taxi ranks increased, compared with 2017 and the number of waiting passengers increased, compared with 2017.

Several coefficients are calculated from the rank survey results and from public consultation. The coefficients are entered into a formula to calculate the Index of Significant Unmet Demand (ISUD). The index value for the 2021 survey was 704.3 for Perth and 2,007.7 for Blairgowrie. These values were significantly above the threshold value of 80 and suggests that there is **significant unmet demand** in both areas.

For comparison, the index values for the 2017 survey were 6.7 for Perth and 17.3 for Blairgowrie.

The ISUD value, considered along with feedback from stakeholders and the public leads to the conclusion that there is **significant unmet demand** in both Perth and Blairgowrie.

When passengers arrive at a taxi rank and find no waiting taxis and/or a lengthy queue of passengers, they sometimes try and book a licensed vehicle for immediate travel by calling one of the local booking numbers, in Perth or Blairgowrie, or by using a booking app.

This behaviour was observed at the ranks during the 2021 survey. In the future, if the availability of taxis at the ranks doesn't increase, then, over time, passengers will anticipate lack of provision and will increase use of pre-booked hires, rather than go to the ranks.

The significant increase in passenger queuing appeared to be strongly linked to reduced levels of provision related to lower levels of licensed taxi driver availability, rather than the number of taxi vehicles licensed. No taxi vehicle licences have been returned to the Council at the time of writing.

In order to provide a public benefit through adequate supply of taxi services at the ranks, more capacity, in terms of more taxis working from the ranks, would need to be provided. In the first instance, increased availability of licensed taxi drivers working from the ranks would provide additional capacity from the existing fleet of taxi vehicles. However, whilst taxi drivers who have found alternative means of earning income during the Covid-19 pandemic, may return to servicing rank based demand, there is no mechanism to force any additional or returning drivers to work from the ranks, as opposed to service demand from pre-booked hires. The only measure available to the Council to address the shortfall in capacity, is to issue more hackney carriage vehicle licences in anticipation that this will provide higher levels of service for rank based demand.

In Blairgowrie, reduced driver availability and reduced hours of operation of taxis was compounded by the location of the taxi rank. Taxi rank position was a common complaint from the public and trade.

Other considerations

The elderly and people with mobility impairments rely more heavily on the services of licensed vehicles, than the population at large. Feedback from consultation with stakeholders and the public suggest that people with mobility impairments find that the availability of taxis during school run times is an issue. Limited availability during morning and afternoon periods associated with school transport contracts, was corroborated widely. However, the impact on availability affected all users and was not limited to mobility impaired users.

Wheelchair users face particular difficulties with anxiety associated with reliability of return trip bookings of wheelchair accessible vehicles (WAV). Operators of wheelchair accessible licensed vehicles, on occasion, cannot commit to fulfilling return legs of trips. This can impact on bookings made several days in advance, or bookings made for immediate travel and return an hour or two later. For users who are highly reliant on wheelchair accessible licensed vehicles for travel, with limited or no alternatives available, this limitation can be a source of anxiety. The lack of reliability affects the freedom to travel for some wheelchair users.

Some are unwilling to make any but the most essential trips, in order to avoid the stress associated with wheelchair travel. The proportion of wheelchair user trips affected in this way is small, but the impact is disproportionately large and impacts on quality of life.

There are 10 WAV taxis in Perth and 1 WAV taxi in Blairgowrie. There are also WAV private hire cars which, whilst not restricted to localities for operation, tend to serve particular areas. There are 31 WAV private hire cars which serve in and around Perth and 2 which serve in and around Blairgowrie. The provision of WAV licensed vehicles, as a proportion of the fleet as a whole, exceeds the proportion of the population which is wheelchair bound and is restricted to WAV licensed vehicles for travel. However, WAV vehicles tend to be larger than other saloon based licensed vehicles and are often used for transporting larger groups or groups with luggage. In addition, WAV vehicles do not limit service to wheelchair users and are widely used in general service. Consequently, the provision of WAV vehicles does not always match the demand for these vehicles by wheelchair users at all times. Many of the vehicles may be engaged on other hires or not in service, at any given time. Any increase in provision of WAV would increase the probability of availability at various times of day.

There does appear to be some unmet demand for wheelchair accessible licensed vehicles in Perth and to a lesser extent in Blairgowrie. The quantity of demand which would be released if more WAV vehicles were available, is not known. However, some operators have identified that this is a sector of society which can provide significant levels of demand and have provided WAV vehicles to service this market sector. However, even for those operators who have included WAV vehicles in their fleets, it is likely that there will be times when these vehicles are not available for transporting wheelchair users, owing to prior bookings or drivers not working at those particular times.

If any additional taxi vehicle licences were to be released, it would be worth considering restricting any additional licences to be approved WAV vehicles, as this would increase the level of provision of WAV vehicles. However, there is no guarantee that any operators of new WAV taxi plates would target the wheelchair user market. The availability of such plates may be viewed simply as a means of accessing the general taxi market. Measures to help providers identify demand for WAV services and help wheelchair users find reliable service providers, may be more effective at improving the public benefit of taxi provision for wheelchair users.

Identifying demand for WAV is challenging. A basic step is to identify what proportion of the population are wheelchair users and how the proportion of wheelchair users varies by age. Use of WAV vehicles is likely to be influenced by other lifestyle features, besides the necessity of using a wheelchair. Existing WAV operators may be able to compare the

proportion of existing wheelchair user hires, with the overall proportion of wheelchair users in the community, to estimate the difference. Often, WAV operators are willing to share such information with the licensing authorities.

Consideration of appropriate increase in taxi vehicle licences

The number of additional taxi vehicle licences required, to reduce passenger waiting to a level which is not considered significant, can be fairly straightforward to calculate, if we assume that operational practices associated with the new licences are the same as existing. However, some members of the trade may respond by changing how they operate.

The operational background of applicants for new taxi vehicle licences may vary. Examples include:

- Applications from existing taxi vehicle licence holders,
- Applications from licensed drivers who don't hold a vehicle licence of any type,
- Applications from existing holders of private hire car vehicle licences.

Applicants may intend to operate a newly licensed taxi as an additional vehicle, which is driven by another person on a rental or partnership basis, or applicants may intend to operate as an owner/driver.

Some licensing authorities issue additional taxi vehicle licences with additional conditions relating to vehicle type. For example, stipulating that any additional taxi vehicle licences could only be for approved wheelchair accessible vehicles, or stipulating additional environmental standards associated with vehicle types, such as Euro 6 emissions, hybrid vehicles or electric vehicles. Potentially combinations of these conditions or additional conditions could be applied. Such conditions would affect the likely take up of additional taxi vehicle licences and how such licensed taxis would be operated.

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.

With respect to the number of taxi licences in the City of Perth, it is recommended that the issue of an additional 5 licences is considered.

In Blairgowrie, the taxi fleet primarily undertakes pre-booked hires. The number of rank-based hires is relatively low and forms a small proportion of all hires undertaken by Blairgowrie taxis. A limit to taxi numbers

should offer some benefit to the public, in terms of reliability of service, quality of vehicles, level of service and driver knowledge, experience and expertise. In Blairgowrie, as most hires are pre-booked, the type of service offered by taxis compares closely with the type of service offered by private hire cars. The limit on the number of taxis in Blairgowrie doesn't appear to offer a benefit to the public, over and above the service provided by private hire cars. Only taxis may wait at and pick up passengers from the taxi rank. However, the survey data indicated that passengers could not reliably find a taxi waiting at the taxi rank.

The the number of private hire cars is not capped. Consequently, the availability of vehicle licences to service pre-booked hires is not capped. Much of this market is currently serviced by taxis, in Blairgowrie.

When we consider how many more taxis would be required in order to address the level of unmet demand at the taxi rank in Blairgowrie. We can scale up the number of taxis in effective operation during periods when unmet demand was observed. However, the nature of use of the taxi rank meant that the number of taxis effectively working from the rank was low during these periods. The level of proportionate increase in taxis required would be several orders of magnitude of the existing fleet size. In effect, this would require more licences than were ever likely to be taken up by taxi operators.

Key elements to consider in Blairgowrie are:

- The current cap has not ensured a high level of service at the rank in Blairgowrie.
- A the large number of additional taxis which would be required, based on current operational practices, to ensure passengers had a reasonable expectation of finding a taxi waiting at the rank.
- The majority of taxi hires in Blairgowrie are pre-booked hires.

The only mechanism open to the licensing authority to address the level of unmet demand is to issue more taxi vehicle licences. Given the elements considered earlier, the level of increase in taxi numbers which would be required in Blairgowrie would be several times the existing fleet size. An increase of this level would be sufficient to effectively remove the cap on taxi numbers in Blairgowrie.

Consequently, there seems to be little justification to retaining the cap on taxi licences in Blairgowrie. **It is recommended that consideration is given to removing the cap on taxi vehicle licences in Blairgowrie.**





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1 General introduction and background

Perth & Kinross Council is responsible for the licensing of Taxi and Private Hire Vehicles 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 151,910 using the 2020 estimates currently available from the 2011 census.

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 and in Blairgowrie.

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 3 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 based on 2020 figures and Mid 2020 population data.

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

Licensing Area	Population	Taxi vehicles	Private hire cars	Total licensed vehicles	Taxis per 1,000 population	Private Hire Cars per 1,000 population	Total licensed vehicles per 1,000 population
Angus	115,820	121	67	188	1.0	0.6	1.6
East Ayrshire	121,600	125	90	215	1.0	0.7	1.8
Midlothian	93,150	46	124	170	0.5	1.3	1.8
Dumfries and Galloway	148,290	206	66	272	1.4	0.4	1.8
Clackmannanshire	51,290	47	48	95	0.9	0.9	1.9
Moray	95,710	170	27	197	1.8	0.3	2.1
North Ayrshire	134,250	222	56	278	1.7	0.4	2.1
Fife	374,130	480	298	778	1.3	0.8	2.1
Perth and Kinross	151,910	104	225	329	0.7	1.5	2.2
Stirling	94,080	77	128	205	0.8	1.4	2.2
Scottish Borders	115,240	199	61	260	1.7	0.5	2.3
East Lothian	107,900	132	112	244	1.2	1.0	2.3
Orkney Islands	22,400	35	20	55	1.6	0.9	2.5
South Ayrshire	112,140	115	169	284	1.0	1.5	2.5
West Lothian	183,820	95	400	495	0.5	2.2	2.7
Aberdeenshire	260,780	425	356	781	1.6	1.4	3.0
Argyll and Bute	85,430	183	77	260	2.1	0.9	3.0
Falkirk	160,560	395	115	510	2.5	0.7	3.2
Highland	235,430	553	200	753	2.3	0.8	3.2
Inverclyde	77,060	241	53	294	3.1	0.7	3.8
Na h-Eileanan Siar	26,500	85	25	110	3.2	0.9	4.2
Aberdeen City	229,060	805	207	1,012	3.5	0.9	4.4
East Renfrewshire	96,060	53	398	451	0.6	4.1	4.7
Dundee City	148,820	525	189	714	3.5	1.3	4.8
West Dunbartonshire	88,340	336	92	428	3.8	1.0	4.8
North Lanarkshire	341,140	483	1,415	1,898	1.4	4.1	5.6
South Lanarkshire	320,820	350	1,436	1,786	1.1	4.5	5.6
Shetland Islands	22,870	73	58	131	3.2	2.5	5.7
East Dunbartonshire	108,750	279	345	624	2.6	3.2	5.7
Renfrewshire	179,390	235	989	1,224	1.3	5.5	6.8
City of Edinburgh	527,620	1,313	2,486	3,799	2.5	4.7	7.2
Glasgow City	635,640	1,420	3,845	5,265	2.2	6.0	8.3

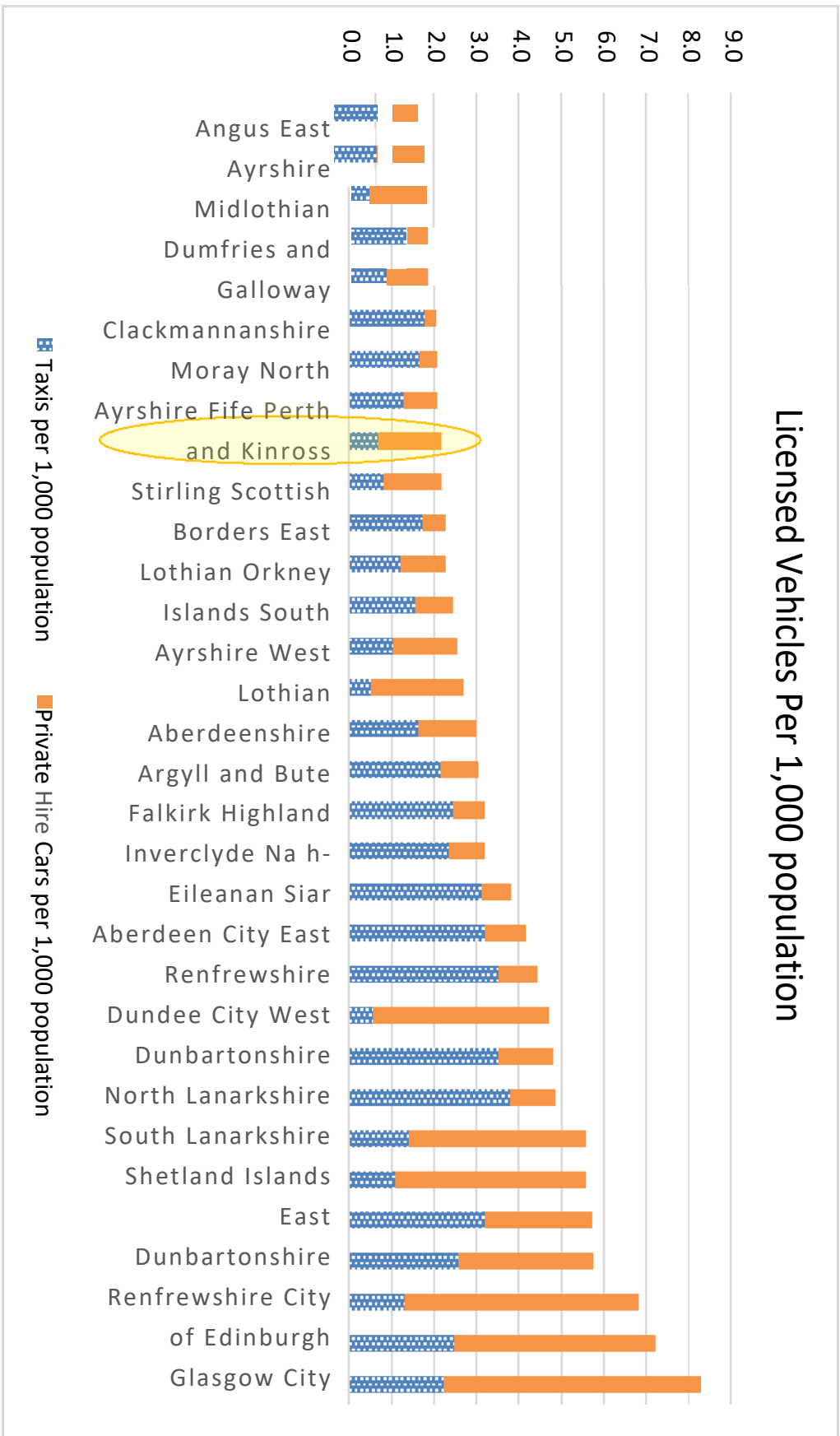


Figure 3 - Comparison of Licensed Vehicles per 1,000 population

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 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

	Private hire driver to Private Hire Car ratio	Taxi driver to Taxi vehicle ratio	All licensed vehicle drivers to all licensed vehicle ratio
West Dunbartonshire	0.00	1.34	1.05
East Dunbartonshire	0.34	2.05	1.10
Dundee City	0.14	1.54	1.17
East Lothian	0.00	2.21	1.20
Renfrewshire	1.03	1.96	1.21
Falkirk	0.89	1.31	1.22
South Lanarkshire	1.02	2.05	1.22
Scottish Borders	0.43	1.47	1.23
Aberdeen City	0.04	1.56	1.25
Clackmannanshire	0.06	2.64	1.34
North Lanarkshire	1.04	2.29	1.36
Highland	1.40	1.37	1.38
Moray	0.52	1.53	1.39
East Renfrewshire	1.40	1.40	1.40
Glasgow City	1.39	1.62	1.45
West Lothian	1.46	1.87	1.54
Na h-Eileanan Siar	1.00	1.71	1.55
Dumfries and Galloway	0.20	2.03	1.59
City of Edinburgh	1.31	2.13	1.59
Angus	1.78	1.54	1.62
Inverclyde	0.00	2.10	1.72
Argyll and Bute	0.75	2.13	1.72
Perth and Kinross	0.00	5.51	1.74
East Ayrshire	0.23	2.94	1.80
Stirling	0.09	4.68	1.81
Midlothian	1.85	1.74	1.82
Aberdeenshire	0.33	3.16	1.87
South Ayrshire	0.47	4.05	1.92
North Ayrshire	0.04	2.53	2.03
Orkney Islands	0.60	2.89	2.05
Fife	0.00	3.49	2.15
Shetland Islands	1.29	3.70	2.63
Scotland	1.06	2.05	1.47

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 July 2021 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
East Lothian	24
Fife	40
Glasgow	41
Edinburgh	50
Moray	69
Shetland	73
Mid Lothian	120
Argyll & Bute	121
Aberdeenshire	147
Clackmannan	149
South Ayrshire	155
Scottish Borders	159
Aberdeen City	160
East Ayrshire	169
East Kilbride	213
Highland	217
Orkney	224
Angus	239
Renfrewshire	245
Stirling	246
Dundee	249
West Lothian	262
Dumfries & Galloway	267
East Dunbartonshire	268
Falkirk	272
Clydebank	286
Dumbarton & Vale of Leven	287
Perth & Kinross	291
Inverclyde	297
East Renfrew	301
North Ayrshire	305
South Lanarkshire (Clydesdale)	309
Hamilton	320
North Lanarkshire	334
Western Isles	343

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 70 taxis licensed within the zone.

Five taxi rank locations in Perth were surveyed from the morning of Thursday 10th June 2021 to the morning of Sunday 13th of June 2021

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 10th June 2021 to 7:00 on Sunday 13th June.

When the cameras were installed at the ranks, it was noted that the rank location on South Street, outside Loft, was in use as an external seating area for nearby hospitality premises. Nearby on street parking spaces were still in use for general parking. Consequently, there was no space for taxis to rank up at this location. A camera was installed at this location, covering both sides of the road on South Street, in case there was any alternative informal ranking taking place. However, during the survey period, there were no taxis observed waiting at this location.

Overview of observations

During the course of the survey, some 774 taxis were observed departing the ranks with passengers. This total was substantially less than the 1,959 vehicles were observed departing the ranks, with passengers during the 2017 survey. The observed number of hires in June 2021 was 39.5% of the level observed in October 2017.

The number of hires observed during the 2021 survey equates to approximately 11 hires per vehicle (with a fleet size of 70) over the three days of observation.

The proportion of taxis which left the rank empty was approximately 40%. This is higher than the 24% proportion observed during the 2017 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. Given the proportion of empty departures and the relatively low level of rank hires observed, it is likely that many vehicles which departed empty were undertaking pre-booked hires, either as part of a booking circuit, or through personal direct hires, by telephone to the driver. This presumption was corroborated by feedback from the trade.

During the course of the surveys, one passenger was observed, who used a wheelchair.

Many incidences of passenger waiting were observed. Out of 1,095 passengers observed using Taxis, 298 (27%) had to wait for a taxi. It should be noted that not all passengers observed waiting for a taxi, actually boarded a taxi. 49 intending passengers left the ranks in frustration, having waited at the rank for a taxi to arrive. For comparison, during the 2017 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 2021 survey was 46 minutes 36 seconds. During the 2017 survey, the maximum wait time observed was 12 minutes 26 seconds.

The average waiting time for all passengers who had to wait for a Taxi, during the 2021 survey, was 12 minutes 31 seconds. This compares with the observed average wait time during the 2017 survey, of 2 minutes and 8 seconds.

During the 2021 survey, the average waiting time for all passengers, including those who didn't have to wait, was 3 minutes 25 seconds. This compares with the average, from the 2017 survey, of 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	212	182	394	242	1.3	11
South Street - Loft	0	0	0	0	0.0	0
Pomarium Street	9	2	11	4	2.0	6
Perth Railway Station	24	7	31	12	1.7	8
South Street (Tesco)	36	94	130	124	1.3	8
Murray Street	143	79	222	102	1.3	13

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	190	341	531	463	1.4	6
South Street - Loft	0	0	0	0	0.0	0
Pomarium Street	9	0	9	0	0.0	7
Perth Railway Station	19	23	42	31	1.3	10
South Street (Tesco)	21	114	135	145	1.3	7
Murray Street	141	204	345	287	1.4	5

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	110	251	361	390	1.6	7
South Street - Loft	0	0	0	0	0.0	0
Pomarium Street	3	0	3	0	0.0	6
Perth Railway Station	11	13	24	21	1.6	6
South Street (Tesco)	20	71	91	99	1.4	11
Murray Street	76	167	243	270	1.6	5

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	Average vehicle wait time at the ranks per taxi (minutes)
Total for all locations	512	774	1286	1095	1.4	7
South Street - Loft	0	0	0	0	0.0	0
Pomarium Street	21	2	23	4	2.0	6
Perth Railway Station	54	43	97	64	1.5	6
South Street (Tesco)	77	279	356	368	1.3	7
Murray Street	360	450	810	659	1.5	5

The number of passengers who had to wait at a rank for a taxi, is presented in Figure 4, aggregated across all ranks.



Figure 4 - 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 5. It should be noted that in some hours, the waiting passenger percentage exceeded 100%. The waiting passengers included those who gave up waiting, before a taxi arrived. However, the total passenger volumes reflect those who boarded taxis and did not include those who waited and gave up.

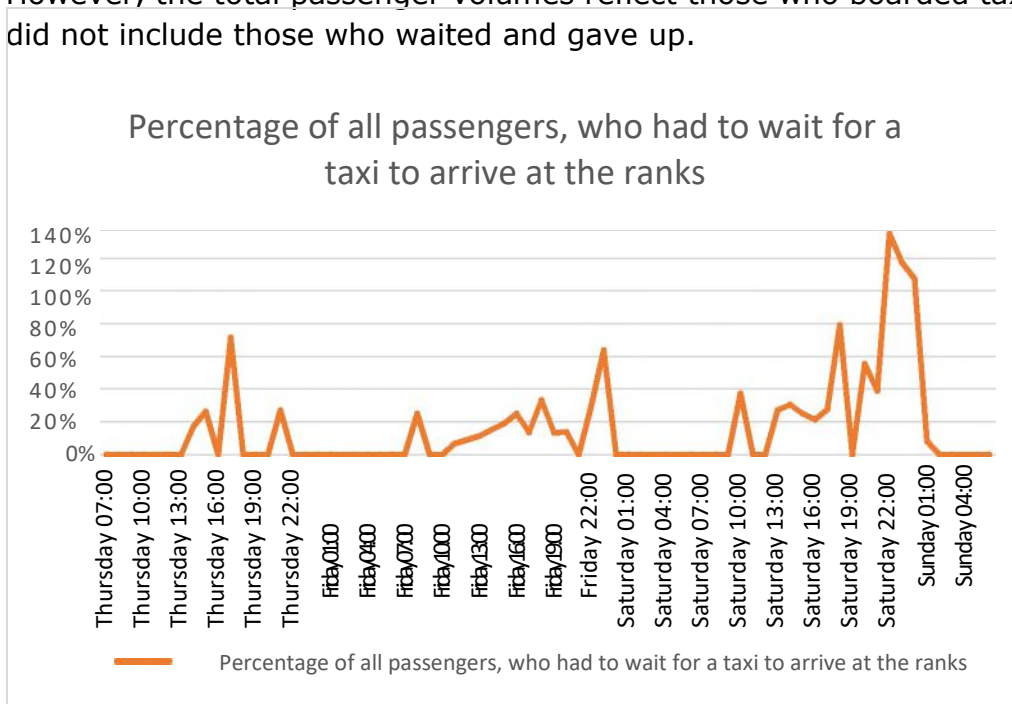


Figure 5 - Proportion of boarding passengers who waited for a taxi (Perth)

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.

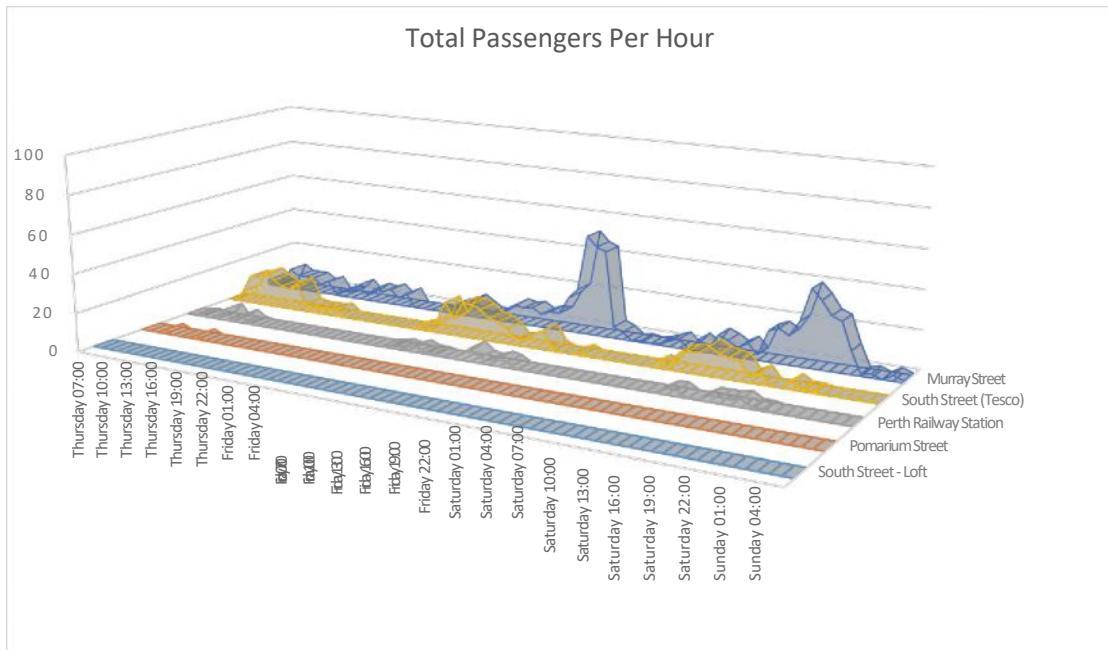


Figure 6 – Observed 2021 volumes of passengers through each rank

The profile of passenger demand is dominated by the Murray Street rank during Friday and Saturday evenings. No activity was observed at South Street – Loft rank location.

It is prudent to consider observed volumes, in the context of pre-Covid levels. The 2017 survey results are presented below.

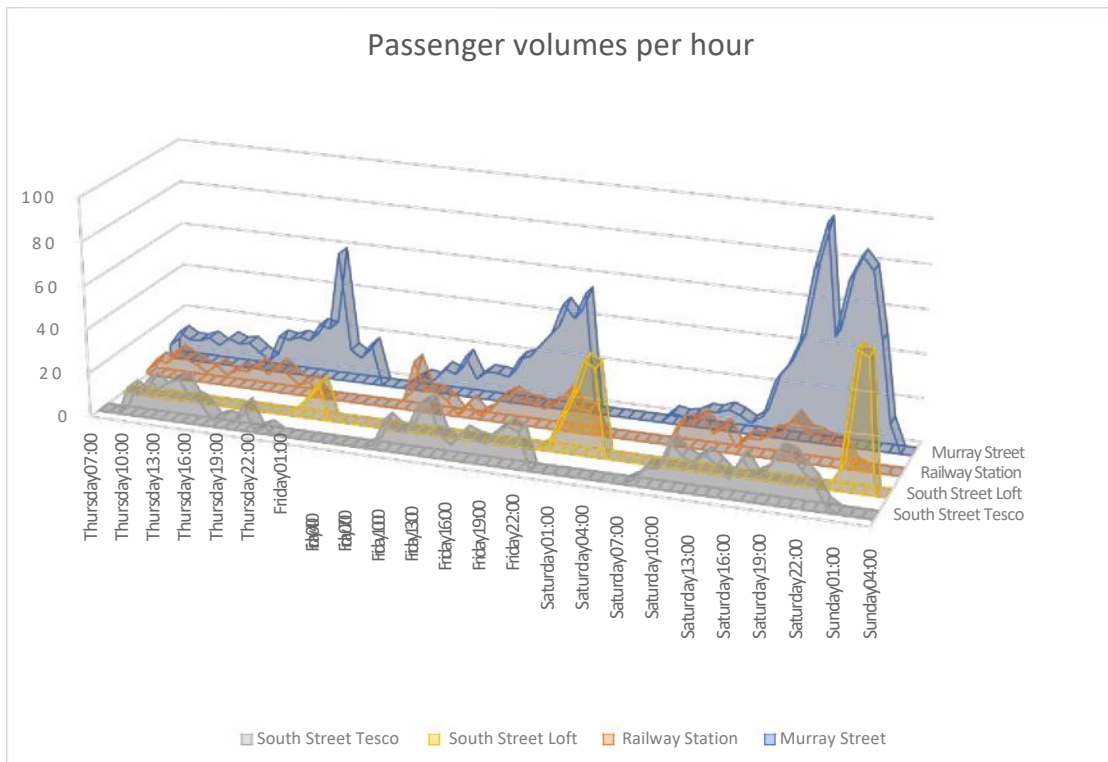


Figure 7 - Observed 2017 volumes of passengers through each rank

Comparing 2017 results with 2021 results, it can be seen that 2017 volumes were generally higher and peak demand continued later into the night on Friday and Saturday nights. Passenger volumes at the Railway Station were significantly less in 2021 than in 2017.

Taxi Vehicle Waiting Time at ranks

The time spent by Taxis waiting at the ranks was recorded. The average wait time, during each hour, is presented in the following figure:

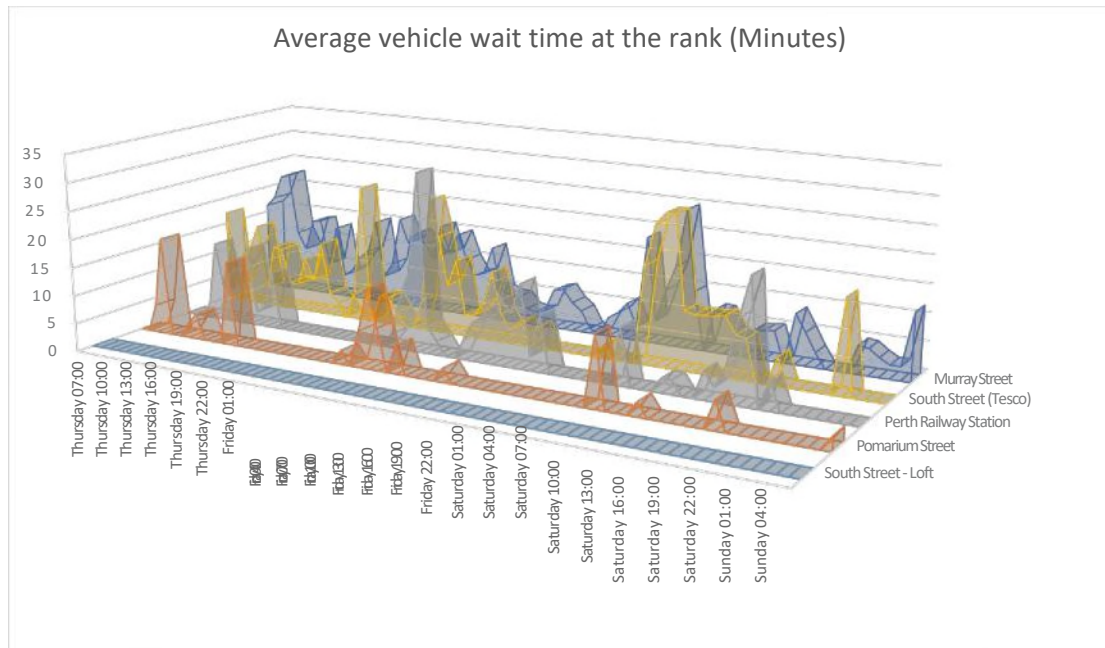


Figure 8 - Taxis average vehicle wait time

The proportion of Taxis leaving the ranks empty, varied significantly by rank.

The following proportions of Taxis leaving the ranks empty were observed:

Table 4 - Proportion of Taxis leaving ranks empty

Rank	Proportion of taxis leaving the rank empty
Pomarium Street	91%
Perth Railway Station	56%
South Street (Tesco)	22%
Murray Street	44%
All ranks	40%

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 9 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.

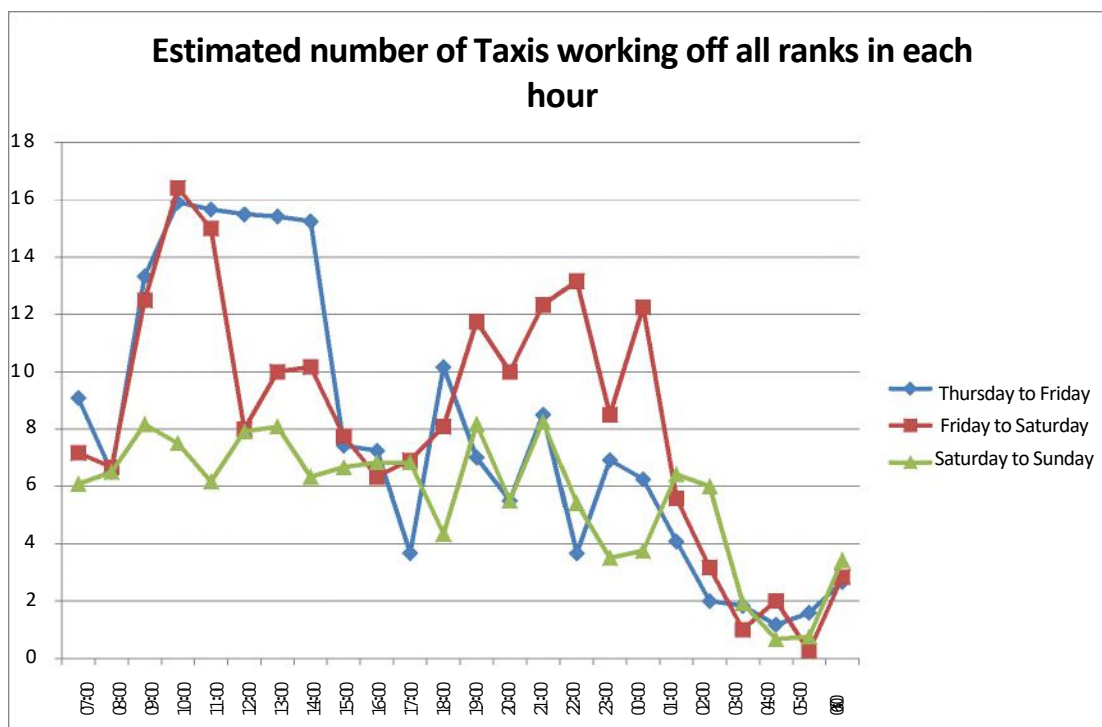


Figure 9 - Estimate of taxis working from the ranks (Perth)

The number of taxis working from the ranks dropped on Thursday and Friday during 'school run' periods. This corresponds with feedback from the public and stakeholders that these are periods when it can be more difficult to obtain a taxi. Indeed, there was an increase in observed passenger waiting at the ranks during these periods.

On Friday night, the number of taxis working from the ranks increased compared with the afternoon. However, during the hour beginning 23:00, the number of taxis working from the ranks dropped. This corresponded with a peak in passengers waiting at the ranks at this time.

On Saturday, the number of taxis working from the ranks dropped in the evening, from around 21:00 hours until midnight. This corresponds with the period when the bulk of passenger waiting at the ranks occurred.

Blairgowrie taxi rank

Within Perth & Kinross, Blairgowrie is defined as a separate taxi licensing zone, with a limit of 12 taxis licensed within the zone.

In Blairgowrie, there is a single taxi rank, on Wellmeadow, near some bus stances. The rank is located in a marked area within a car park. The rank was surveyed from the morning of Thursday 10th June 2021 to the morning of Sunday 13th of June 2021.

The survey was undertaken using a video camera which recorded activity at the rank from Thursday to the following Sunday morning. The activity at the rank was processed from the video footage, 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 10th June 2021 to 7:00 on Sunday 13th June. Footage from active periods at the rank was processed and tabulated for further analysis.

Summary of rank observations

Table 5 - Summary of Blairgowrie rank activity

Day	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)
Thursda	11	4	15	4	1	13
Friday	29	5	34	7	1	11
Saturday	8	3	11	3	1	10
Total	48	12	60	14	3	34

Overview of observations

During the course of the survey, some 12 vehicles were observed departing the ranks, with passengers. This equates to approximately 1 hire per vehicle (with a fleet size of 12) over the three days of observation. An average of 1 rank hire per vehicle over three days is lower than one would expect, if taxis were reliant solely on rank hires for business.

During the 2017 survey, 100 vehicles were observed departing the rank with passengers.

The rank was not attended by taxis all of the time. However, some taxis did wait at the rank from time to time. Most of the waiting taxis left the rank without any passengers. The proportion of taxis which left the rank empty was approximately 80%. 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. As there is no other rank in Blairgowrie, it is assumed that virtually all empty departures were in order to participate in undertaking pre-booked hires.

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

Several incidences of passenger waiting were observed. 11 passengers were observed waiting for a taxi at the rank. 8 of the 11 waiting passengers gave up waiting and left the rank on foot. A total of 14 passengers were observed departing the rank in taxis, including the 3 waiting passengers who did not give up waiting. The average waiting time for all passengers who had to wait for a Taxi, was 10 minutes and 22 seconds. The average waiting time for all passengers, including those who didn't have to wait, was 5 minutes 35 seconds.



Figure 10 – Total waiting passengers each hour (Blairgowrie)

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

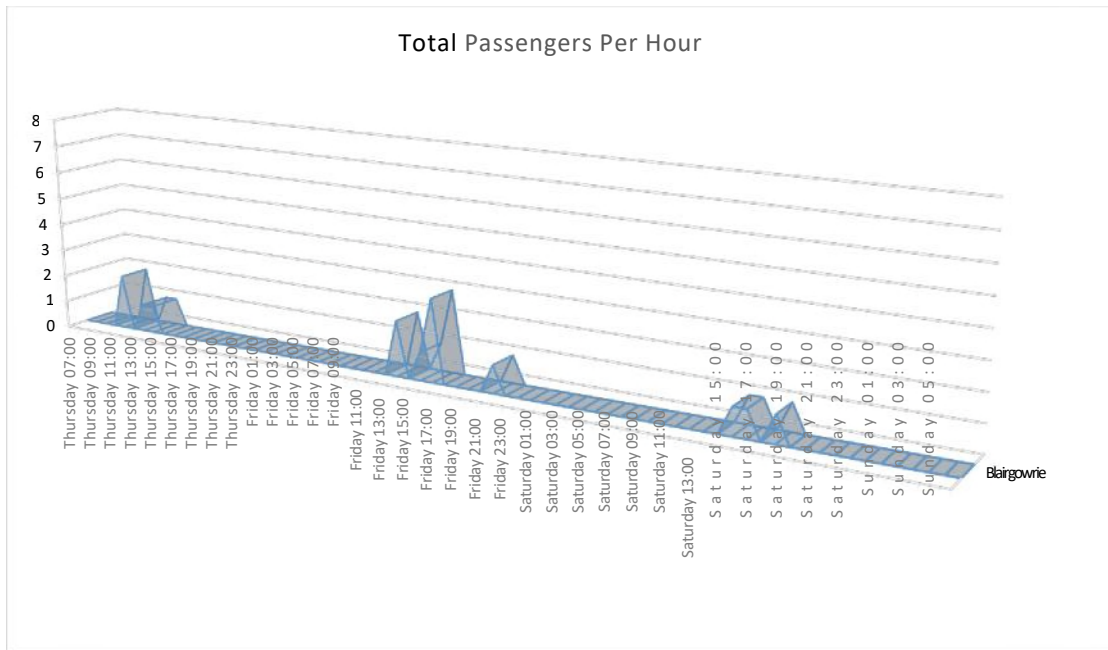


Figure 11 - Observed volumes of passengers 2021

When compared with passenger volumes observed in 2017 (Figure 12) it can be seen that passenger volumes have dropped significantly.

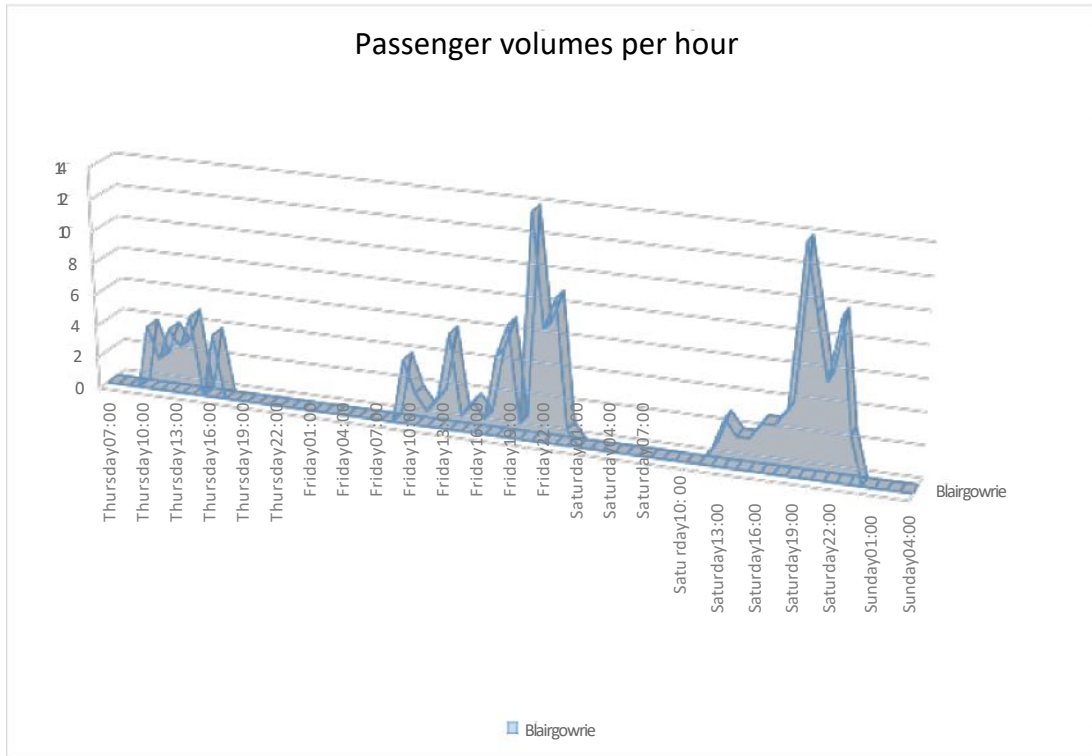


Figure 12 – Observed volumes of passengers 2017

Taxi Vehicle Waiting Time at ranks

The time spent by Taxis waiting at the ranks was recorded. The average hourly wait time is presented in the following figure:

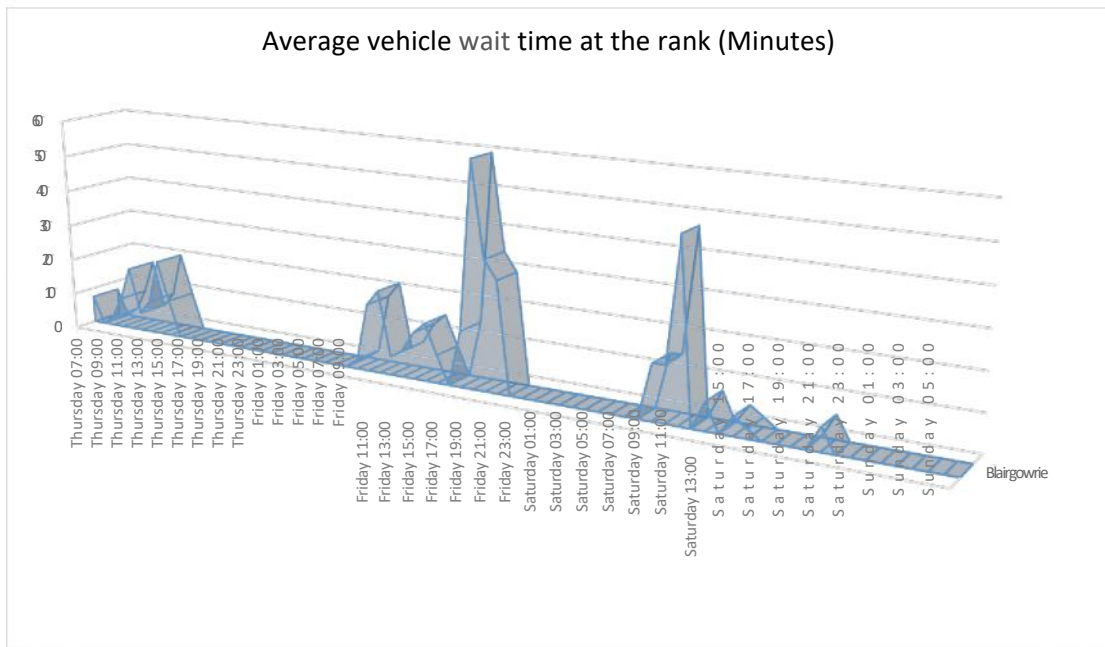


Figure 13 - Taxis average vehicle wait time

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.

Surveys of the public were undertaken in Perth and Blairgowrie. The surveys were undertaken as online surveys and as face to face on street interviews. With respect to Perth, a total of 127 online survey responses and 207 face to face responses were obtained. For Blairgowrie, a total of 33 online survey responses were obtained and 53 face to face interview responses.

The results of the surveys 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 & Blairgowrie public attitude survey results

Respondents were asked all the ways in which they could hire a private hire car. This question was intended to establish the respondent's understanding of the differences between taxis and private hire cars. In Perth 25% of online respondents and 18% of on street respondents chose one or more means of hiring a private hire car, which were only valid for taxis. In Blairgowrie, the proportions were; 31% of online respondents and 38% of on street respondents chose one or more means of hiring a private hire car, which were only valid for taxis.

Interviewees were also asked all the ways in which they could hire a Taxi. Whilst all of the methods identified were valid, 15% of online and 52% of on street respondents in Perth did not identify hiring at a rank as one of the valid means of hiring a taxi. In Blairgowrie, 25% of online respondents and 45% of on street respondents did not identify hiring at a rank.

Booking by telephone or mobile app was the most popular means identified for both private hire cars and for taxis in Blairgowrie and in Perth.

During the conduct of the survey, it was recognised that Covid-19 restriction measures would have impacted the frequency and pattern of use of taxis. Therefore, some of the questions asked, related to normal conditions prior to the spread of Covid-19.

The public were asked if they had made one or more trips taxi or private hire car in Perth and Kinross Council area, in the 12 months prior to February 2020?

Table 6 - Use of licensed vehicles, pre-Covid, online responses

Thinking back to times prior to the impact of Covid-19, (i.e. before March 2020), had you made one or more trips by taxi or private hire car in Perth and Kinross Council area, in the 12 months prior to February 2020?	Blairgowrie		Perth	
	YES	31	100.0%	109
NO	0	0.0%	16	12.8%
TOTAL	31	100.0%	125	100.0%

Table 7 - Use of licensed vehicles, pre-Covid, on street responses

Thinking back to times prior to the impact of Covid-19, (i.e. before March 2020), had you made one or more trips by taxi or private hire car in Perth and Kinross Council area, in the 12 months prior to February 2020?	Blairgowrie		Perth	
	YES	48	92.3%	169
NO	4	7.7%	38	18.4%
TOTAL	52	100.0%	207	100.0%

The proportion of people who had used a taxi was higher in Blairgowrie than in Perth.

Respondents were asked whether they travel more often by taxi or private hire car. Results were:

Table 8 - Type of licensed vehicle used most often, pre-Covid, online responses

Thinking back to times before the impact of Covid-19, which type of licensed vehicle would you have used most often?	Blairgowrie		Perth	
	Private Hire	8	25.0%	12
Taxi	18	56.3%	49	44.5%
Have used both types more or less equally	4	12.5%	40	36.4%
Don't know which kind of vehicle I used	2	6.3%	8	7.3%
I don't recall using either type of licensed vehicle	0	0.0%	1	0.9%
TOTAL	32	100.0%	110	100.0%

Table 9 - Type of licensed vehicle used most often, pre-Covid, on street responses

Thinking back to times before the impact of Covid-19, which type of licensed vehicle would you have used most often?	Blairgowrie		Perth	
	Private Hire	15	30.6%	33
Taxi	20	40.8%	58	34.1%
Have used both types more or less equally	6	12.2%	56	32.9%
Don't know which kind of vehicle I used	8	16.3%	23	13.5%
I don't recall using either type of licensed vehicle	0	0.0%	0	0.0%
TOTAL	49	100.0%	170	100.0%

Taxi use was identified more frequently than private hire, in both Blairgowrie and Perth. However, in Perth, a significant proportion of respondents either used both types of licensed vehicles or couldn't recall which type they used most often.

Interviewees were asked how often they use taxis in particular, as opposed to licensed Car vehicles in general. Responses were as follows:

Table 10 - Frequency of taxi use, pre-Covid, online responses

Typically, (During pre Covid-19 times) How frequently did you travel by Taxi, as opposed to Private Hire Car? (i.e. the ones with signs on the roof, which wait at taxi ranks)	Blairgowrie		Perth	
Three or more times a week	8	25.0%	16	14.5%
Once or twice a week	6	18.8%	29	26.4%
Less than once a week but more than twice a month	4	12.5%	13	11.8%
Once or twice a month	3	9.4%	22	20.0%
Less than once a month but more than twice a year	4	12.5%	19	17.3%
Once or twice a year	5	15.6%	7	6.4%
Never	2	6.3%	4	3.6%
TOTAL	32	100.0%	110	100.0%

Table 11 - Frequency of taxi use, pre-Covid, on street responses

Typically, (During pre Covid-19 times) How frequently did you travel by Taxi, as opposed to Private Hire Car? (i.e. the ones with signs on the roof, which wait at taxi ranks)	Blairgowrie		Perth	
Three or more times a week	9	18.8%	17	10.0%
Once or twice a week	6	12.5%	37	21.8%
Less than once a week but more than twice a month	8	16.7%	24	14.1%
Once or twice a month	3	6.3%	29	17.1%
Less than once a month but more than twice a year	7	14.6%	42	24.7%
Once or twice a year	13	27.1%	13	7.6%
Never	2	4.2%	8	4.7%
TOTAL	48	100.0%	170	100.0%

Interviewees were asked the most common purpose for travelling by taxi or private hire car. Answers included:

Table 12 - Licensed vehicle trip purposes, pre-Covid, online responses

What was the most common purpose of any trips by licensed vehicle (Pre Covid-19)?	Blairgowrie		Perth	
Leisure	15	48.4%	46	69.7%
Work or education	4	12.9%	25	37.9%
Shopping	3	9.7%	16	24.2%
Personal business	1	3.2%	7	10.6%
Hospital / Medical	6	19.4%	10	15.2%
Link to other transport mode	1	3.2%	4	6.1%
Other	1	3.2%	4	6.1%
TOTAL	31	100.0%	66	100.0%

Table 13 - Licensed vehicle trip purposes, pre-Covid, on street responses

What was the most common purpose of any trips by licensed vehicle (Pre Covid-19)?	Blairgowrie		Perth	
Leisure	23	50.0%	60	52.2%
Work or education	6	13.0%	37	32.2%
Shopping	4	8.7%	32	27.8%
Personal business	2	4.3%	8	7.0%
Hospital / Medical	9	19.6%	22	19.1%
Link to other transport mode	1	2.2%	8	7.0%
Other	1	2.2%	8	7.0%
TOTAL	46	100.0%	115	100.0%

Table 14 - Value for money rating, online survey

How did you rate your most recent trips by taxi and by private hire, for value for money, ranging from 1 very poor to 5 very good?	Blairgowrie	Perth
Private hire car, average rating	3.4	3.6
Taxi, average rating	3.6	3.7

Table 15 - Value for money rating, on street survey

How did you rate your most recent trips by taxi and by private hire, for value for money, ranging from 1 very poor to 5 very good?	Blairgowrie	Perth
Private hire car, average rating	3.5	3.7
Taxi, average rating	3.5	3.9

Table 16 - Taxi standards rating, online survey

With respect to the standard of TAXIS in the area you most commonly use them in Perth and Kinross, how would you rate these aspects with 1 very poor and 5 very good.	Blairgowrie	Perth
Vehicle Cleanliness	3.8	3.7
Vehicle condition	3.8	3.7
Driver helpfulness	3.9	3.6
Driver standard of dress	3.7	3.4
Driver standard of hygiene	3.7	3.5
Driver professionalism	3.8	3.6
Driver communication	3.8	3.4
Driver knowledge of area	4.0	3.7

Table 17 - Taxi standards rating, on street survey

With respect to the standard of TAXIS in the area you most commonly use them in Perth and Kinross, how would you rate these aspects with 1 very poor and 5 very good.	Blairgowrie	Perth
Vehicle Cleanliness	4.0	3.9
Vehicle condition	4.0	3.9
Driver helpfulness	4.1	4.0
Driver standard of dress	3.8	3.6
Driver standard of hygiene	3.9	3.7
Driver professionalism	4.0	3.9
Driver communication	4.0	3.7
Driver knowledge of area	4.0	4.0

Table 18 - Private hire car standards rating, online survey

With respect to the standard of PRIVATE HIRE CARS in the area you most commonly use them in Perth and Kinross, how would you rate these aspects with 1 very poor and 5 very	Blairgowrie	Perth
Vehicle Cleanliness	3.5	3.7
Vehicle condition	3.6	3.7
Driver helpfulness	3.7	3.6
Driver standard of dress	3.5	3.5
Driver standard of hygiene	3.5	3.6
Driver professionalism	3.6	3.5
Driver communication	3.6	3.5
Driver knowledge of area	3.8	3.6

Table 19 - Private hire car standards rating, on street survey

With respect to the standard of PRIVATE HIRE CARS in the area you most commonly use them in Perth and Kinross, how would you rate these aspects with 1 very poor and 5 very	Blairgowrie		Perth	
Vehicle Cleanliness	3.6		3.7	
Vehicle condition	3.7		3.7	
Driver helpfulness	3.7		3.7	
Driver standard of dress	3.4		3.5	
Driver standard of hygiene	3.5		3.6	
Driver professionalism	3.6		3.6	
Driver communication	3.7		3.6	
Driver knowledge of area	3.7		3.6	

Table 20 - Vehicle access and egress difficulties, online survey

Have you had any difficulty getting in or out of any type of licensed vehicle in Perth or Blairgowrie?	Blairgowrie		Perth	
Yes	3	9.4%	5	4.0%
No	29	90.6%	121	96.0%
TOTAL	32	100.0%	126	100.0%

Table 21 - Vehicle access and egress difficulties, on street survey

Have you had any difficulty getting in or out of any type of licensed vehicle in Perth or Blairgowrie?	Blairgowrie		Perth	
Yes	1	1.9%	3	1.5%
No	52	98.1%	202	98.5%
TOTAL	53	100.0%	205	100.0%

Table 22 - Vehicle type access and egress difficulties, online survey

Which kind of licensed vehicle was it (that you had difficulty getting in or out of)?	Blairgowrie		Perth	
Taxi	0	0.0%	2	40.0%
Private Hire Car	2	66.7%	1	20.0%
I don't recall which type	0	0.0%	1	20.0%
Both	1	33.3%	1	20.0%
TOTAL	3	100.0%	5	100.0%

Table 23 - Vehicle type access and egress difficulties, on street survey

Which kind of licensed vehicle was it (that you had difficulty getting in or out of)?	Blairgowrie		Perth	
Taxi	1	100.0%	1	100.0%
Private Hire Car	0	0.0%	0	0.0%
I don't recall which type	0	0.0%	0	0.0%
Both	0	0.0%	0	0.0%
TOTAL	1	100.0%	1	100.0%

Interviewees were asked if they have had any difficulties getting in or out of any type of vehicle in Perth & Kinross. The majority said no. Of those who indicated that they had faced difficulties, the following comments were received regarding the type of difficulty faced:

Online surveys:**Perth comments**

- Mobility issues and driver not offering assistance so struggled to get out due to vehicle being too low
- Door handle broken had to push along to other side
- Car being too low and I have a bad back so not easy getting in or out
- I have a guide dog. She sits in the footwell of the front passenger seat. Sometimes the space is far too small for her, so I have to ask for another taxi. I always explain that I have a guide dog when I phone for a taxi. I also make it clear that I have a guide dog because I am aware that some drivers from a different cultural background to mine don't allow dogs in the taxi. When this happens, and it does, I ask the driver to get me another taxi.
- I'm a wheelchair user and not all cars are accessible

Blairgowrie comments:

- Pre covid taxi sharing with other customers unknow to us. And, piling people in with us during covid. Trying to put three adults in the back with a child in front, again causing uncomfortable situation
- Getting in and out of cab.

On street surveys:**Perth comments**

- The vehicle was low down and I could not get out easily
- Difficulty getting in and out of small car.
- Four of us travelling. Three in back seat were squashed

Blairgowrie comments:

- Three adults squashed in back seat, for long journey. Struggle to get in.

Interviewees were asked what the primary factor is which limits their use of Taxis, responses were:

Table 24 - Taxi use limiting factors, online responses

What was the principal factor which limited your use of Taxis in Perth and Kinross (pre Covid-19)?	Blairgowrie		Perth	
	Cost	7	28.0%	31
Waiting time	5	20.0%	14	12.5%
Usually cycle or walk	1	4.0%	5	4.5%
Use the bus instead	2	8.0%	14	12.5%
No need to use Taxis	1	4.0%	13	11.6%
The nearest ranks are too far away	5	20.0%	2	1.8%
I generally use a car	2	8.0%	32	28.6%
I use Private Hire Cars	2	8.0%	1	0.9%
TOTAL	25	100.0%	112	100.0%

Table 25 - Taxi use limiting factors, on street responses

What was the principal factor which limited your use of Taxis in Perth and Kinross (pre Covid-19)?	Blairgowrie		Perth	
	Cost	14	35.0%	52
Waiting time	3	7.5%	5	2.8%
Usually cycle or walk	2	5.0%	8	4.4%
Use the bus instead	2	5.0%	23	12.8%
No need to use Taxis	5	12.5%	23	12.8%
The nearest ranks are too far away	7	17.5%	2	1.1%
I generally use a car	6	15.0%	66	36.7%
I use Private Hire Cars	1	2.5%	1	0.6%
TOTAL	40	100.0%	180	100.0%

The public were asked if they had experienced problems obtaining a taxi prior to the impact of Covid-19.

Table 26 - Problems experienced obtaining a taxi, online responses

Have you experienced problems obtaining a TAXI in Perth and Kinross prior to Covid-19?	Blairgowrie		Perth	
Yes	18	58.1%	47	37.3%
No	13	41.9%	79	62.7%
TOTAL	31	100.0%	126	100.0%

Table 27 - Problems experienced obtaining a taxi, on street responses

Have you experienced problems obtaining a TAXI in Perth and Kinross prior to Covid-19?	Blairgowrie		Perth	
Yes	14	27.5%	48	23.4%
No	37	72.5%	157	76.6%
TOTAL	51	100.0%	205	100.0%

Table 28 - Types of problems experienced, online respondents

Could you tell us a bit more about the problems which you encountered. For example, what type of problem did you have? Where did this problem occur? Approximately what time of day and day of week did this occur?	Blairgowrie	Perth
Responses are summarised in order of decreasing popularity	No taxis at the rank in Blairgowrie	At school start and finish times
	Often no taxis available	Late night at weekends
	Late evening	Always busy
	No wheelchair accessible taxis in Blairgowrie	Lack of availability of wheelchair accessible taxis at ranks
	At school start and finish	Sunday morning
	Not available 24 hours	Perth Railway Station rank later in the day
	Sunday morning	Pre-booked hires unreliable
	Not available to hail in Blairgowrie	Christmas and New Year time
	At meal times no taxis available to hire by phone	

Table 29 - Types of problems experienced, on street respondents

Could you tell us a bit more about the problems which you encountered. For example, what type of problem did you have? Where did this problem occur? Approximately what time of day and day of week did this occur?	Blairgowrie	Perth
Responses are summarised in order of decreasing popularity	Late nights - Limited availability	Limited availability during school run times
	Limited availability during school run times	Late nights - Limited availability
	Long wait times	Friday and Saturday nights limited availability
		Sunday nights long wait times

Individuals were asked the most common way they obtain a taxi. Results were:

Table 30 - Most common method used to obtain a taxi, online respondents

What method do you use most often to obtain a Taxi? (NOT PRIVATE HIRE)	Blairgowrie		Perth	
Phone booking	28	93.3%	87	70.7%
Hailed	0	0.0%	1	0.8%
At a rank	1	3.3%	30	24.4%
Never use Taxis	1	3.3%	5	4.1%
TOTAL	30	100.0%	123	100.0%

Table 31 - Most common method used to obtain a taxi, on street respondents

What method do you use most often to obtain a Taxi? (NOT PRIVATE HIRE)	Blairgowrie		Perth	
Phone booking	49	98.0%	156	76.1%
Hailed	0	0.0%	0	0.0%
At a rank	1	2.0%	44	21.5%
Never use Taxis	0	0.0%	5	2.4%
TOTAL	50	100.0%	205	100.0%

Respondents were asked to assess the availability of taxis in Perth & Kinross:

Table 32 - Taxi availability rating, online respondents

How would you assess the availability of Taxis in the relevant area within Perth and Kinross? (with 1 very poor and 5 very good, and 6, don't know)	Blairgowrie	Perth
Average rating (Range 1 to 5)	3.4	3.6

Table 33 - Taxi availability rating, on street respondents

How would you assess the availability of Taxis in the relevant area within Perth and Kinross? (with 1 very poor and 5 very good, and 6, don't know)	Blairgowrie	Perth
Average rating (Range 1 to 5)	3.3	3.6

When respondents were asked if there were any locations where new taxi ranks should be located, 53% of Blairgowrie online respondents and 35% of Perth online respondents said yes. Of those responding 'yes', suggestions of locations were:

Table 34 - Suggestions for new rank locations, online respondents

Are there any locations in Perth and Kinross where you would like to see new taxi ranks, and when would they be likely to be used?	Blairgowrie	Perth
Responses are summarised in order of decreasing popularity, indicating suggested locations which were likely to be used	More centrally in Blairgowrie	At Supermarkets
	Ratray	Muirton
	Coupar Angus	Broxden Park & Ride
	Tesco	City Hall, Perth
	Alyth	High Street
	Blairgowrie Cottage Hospital	Perth Royal Infirmary
		Outside shops
		Methven and Pitcairngreen in the evenings
		Inside Railway Station (Platform 7)
		Concert Hall
		Bridgend
		Stanley
	Auchterarder, evenings and weekends	

With respect to on street respondents, 19% of Blairgowrie on street respondents said yes. The responses predominantly favoured a more central location for the taxi rank in Blairgowrie. Some favoured a taxi rank at the Tesco supermarket in Blairgowrie.

6% of Perth on street respondents said yes. Of those responding 'yes', suggestions of locations were all suggesting the main supermarkets in Perth.

Respondents were asked if existing ranks had taxis more reliably found there, would they use them more and if so, which ranks. 31% of Blairgowrie online respondents and 29% of Perth online respondents suggested locations that would be used more frequently. Of those

responding 'yes', suggestions of locations were (in decreasing order of popularity):

Table 35 - Ranks which would be used more often, online respondents

Are there existing taxi ranks you would use more if Taxis were more reliably found waiting there? If yes, where?	Blairgowrie	Perth
	Blairgowrie - Wellmeadow	Mill Street [Murray Street]
		South Street
		Railway Station
		Bus Station

3% of Perth on street respondents suggested locations that would be used more frequently. These were primarily the Murray Street rank. Some respondents suggested the Railway Station rank. No on street respondents in Blairgowrie suggested the Blairgowrie rank, or any other location.

Respondents were asked if they had ever given up or made alternative arrangements, when trying to hire a taxi at a rank or by hailing, as none were available.

Of the online respondents, 56% of Blairgowrie respondents and 38% of Perth respondents indicated that they had given up and provided a valid indication of where this had occurred.

The data from on street respondents provided lower proportions of those who had given up, with 4% of Blairgowrie respondents and 7% of Perth respondents stating yes and providing a valid location.

This statistic is used as an indication of the level of latent unmet demand.

Interviewees were asked if they had ever given up or made alternative arrangements, as the wait time was too long, when trying to book a taxi by phoning. Responses were:

Table 36 - Given up waiting for taxi (phone booking), online respondents

Have you tried to book a Taxi (not phc) by phone and had to make alternative arrangements because the wait stated was too long?	Blairgowrie		Perth	
Yes	16	53.3%	68	55.3%
No	14	46.7%	55	44.7%
TOTAL	30	100.0%	123	100.0%

Table 37 - Given up waiting for taxi (phone booking), on street respondents

Have you tried to book a Taxi (not phc) by phone and had to make alternative arrangements because the wait stated was too long?	Blairgowrie		Perth	
Yes	2	3.8%	6	2.9%
No	51	96.2%	199	97.1%
TOTAL	53	100.0%	205	100.0%

Table 38 - Excessive wait times for taxi (phone booking), online respondents

How long was the wait time quoted?	Blairgowrie		Perth	
	Count	Percentage	Count	Percentage
Less than 30 minutes	2	12.5%	11	16.2%
Between 30 minutes and 60 minutes	4	25.0%	39	57.4%
Up to 2 hours	6	37.5%	10	14.7%
More than 2 hours, or no availability	4	25.0%	8	11.8%
TOTAL	16	100.0%	68	100.0%

Table 39 - Excessive wait times for taxi (phone booking), on street respondents

How long was the wait time quoted?	Blairgowrie		Perth	
	Count	Percentage	Count	Percentage
Less than 30 minutes	0	0.0%	0	0.0%
Between 30 minutes and 60 minutes	0	0.0%	1	16.7%
Up to 2 hours	0	0.0%	1	16.7%
More than 2 hours, or no availability	2	100.0%	4	66.7%
TOTAL	2	100.0%	6	100.0%

The public said the following features of Perth & Kinross taxis were particularly good (in descending order of popularity):

Blairgowrie online responses:

Respondents provided a range of positive attributes. Some responses provided several different attributes which were regarded as positive. Responses may be encompassed as follows: Drivers are generally friendly, considerate and helpful. Vehicles are generally clean and in good repair. Drivers tend to have good local knowledge and act in a professional manner. Prices are felt, by some, to be reasonable.

Perth online responses

Availability is generally good. Drivers are friendly and helpful, with good local knowledge and professionalism. Some drivers are smartly dressed.

Some respondents feel loyalty to particular firms as they feel that this loyalty is rewarded with good quality and reliable service.

Communication is good, in particular, for booked hires. The opportunity to pay by card or online payment is seen as a valuable aspect. Vehicles are generally felt to be clean and in good repair.

Blairgowrie on street responses

On street respondents had fewer comments to make. The positive attributes identified were that drivers were generally friendly and helpful, with good local knowledge. Some customers regularly used the same provider. Services were generally felt to be reliable, with clean vehicles.

Perth on street responses

Respondents in Perth felt that availability was generally good and drivers were generally smartly presented friendly and helpful. Vehicles were kept clean.

Respondents were asked what would encourage them to use taxis more often. For online respondents, cheaper fares were top of the list, with more than half of respondents in Perth and over half of respondents in Blairgowrie mentioning reduced cost. Some respondents in both areas mentioned that if they were able to use an app, similar to 'Uber' then they would use taxis more often. The ability to pay electronically or through contactless means and to be able to track an arriving taxi, were also mentioned in both areas.

Fixed price fares were identified as a desirable provision, by some respondents. In particular, fixed price and/or cheaper fares to outlying villages were identified by both Blairgowrie and Perth respondents.

Increased availability at peak times was also identified in both areas, with school run times and late at night identified as particular issues. Reliability of pre-booked hires was identified as an issue which would benefit from improvement, more particularly in Perth than in Blairgowrie.

Respondents from Perth identified driver hygiene and appearance as an improvement which would encourage them to use taxis more.

Perth respondents also suggested more wheelchair accessible vehicles and cab type taxis which are easier to get into and out of, would make them more attractive.

Blairgowrie respondents identified moving the location of the taxi rank, from the current location, to a more central location, which is more accessible by wheelchair users.

On street respondents in Perth identified more taxis available at pub closing times as the top feature which would encourage them to use taxis more. This was followed by a desire for lower fares.

Few respondents in Blairgowrie suggested any features which would encourage them to use taxis more. However, the suggestions which were received were that if taxis were more often found waiting at the taxi rank in Blairgowrie, this would encourage them to use taxis more.

Table 40 - Mobility impairments, online respondents

Do you, or anyone with you in a taxi, have a mobility/ visual impairment or travel in a wheel chair?	Blairgowrie		Perth	
	Yes	10	31.3%	30
No	22	68.8%	95	76.0%
TOTAL	32	100.0%	125	100.0%

Table 41 - Mobility impairments, on street respondents

Do you, or anyone with you in a taxi, have a mobility/ visual impairment or travel in a wheel chair?	Blairgowrie		Perth	
	Yes	1	1.9%	2
No	52	98.1%	203	99.0%
TOTAL	53	100.0%	205	100.0%

Table 42 - Types of mobility impairments, online respondents

What kind of impairment or disability?	Blairgowrie		Perth	
	Muscular dystrophy	0	0.0%	1
Wheelchair	2	22.2%	3	10.7%
Mobility	0	0.0%	11	39.3%
Back and leg and abdomen pain	0	0.0%	1	3.6%
Arthritis	1	11.1%	2	7.1%
Walks with sticks	1	11.1%	2	7.1%
Visual impairment	0	0.0%	3	10.7%
Physical	0	0.0%	1	3.6%
Frail	0	0.0%	1	3.6%
Spina Bifida	2	22.2%	0	0.0%
Arthritis	1	11.1%	2	7.1%
COPD	1	11.1%	0	0.0%
Autism	1	11.1%	0	0.0%
Frail	0	0.0%	1	3.6%
TOTAL	9	100.0%	28	100.0%

On street respondents in both Perth and Blairgowrie, who identified impairments, stated that these were all mobility impairments.

Those who indicated that they or someone in their party travelled with a form of impairment, were asked if they faced any difficulty hiring a suitable vehicle. Responses were as follows:

Table 43 - Did mobility impairments lead to difficulties with travel, online respondents

Did this cause any difficulties with travelling?	Blairgowrie		Perth	
	Yes	5	55.56%	16
No	3	33.33%	7	25.93%
Sometimes	1	11.11%	4	14.81%
TOTAL	9	100.00%	27	100.00%

Table 44 - Did mobility impairments lead to difficulties with travel, on street respondents

Did this cause any difficulties with travelling?	Blairgowrie		Perth	
	Yes	0	0.00%	0
No	1	100.00%	2	100.00%
Sometimes	0	0.00%	0	0.00%
TOTAL	1	100.00%	2	100.00%

Table 45 – Suggested measures to mitigate difficulties hiring a suitable vehicle, online respondents

How would you suggest these difficulties could be reduced for travel by taxi?	Blairgowrie	Perth
	Desperately need rank move in Blairgowrie as there is no wheelchair access. Not easy crossing a main rd and then having to cross a road which all the busses use when they are arriving and departing from bus stance and if I am able to eventually get to the rank there is no cover for me to sit in as there is a big kerb and just a narrow shelter.	Being able to go to a rank for a taxi, just like any able bodied person rather than having to pre book all the time, would be awesome as it would make life much better
		Have the correct taxi turn up that was arranged at time of booking
	Taxi rank in Blairgowrie is to far away and to dangerous get there and not wheelchair friendly	By allowing older passengers with mobility issue the use of front passenger seat as they can stretch out
	More disability awareness by drivers	By the taxis that are used to be a bit higher from the ground or for the driver to ask if you need assistance in getting in or out.
	More availability of adapted vehicles	More accessible vehicles
	Need more wheelchair taxis	More wheelchair access taxis
	More disabled friendly	Easy access vehicle
	Need more wheelchair taxis	Bigger vehicles to step in to.
	Driver to carry shopping	Compassionate / understanding drivers
		Taxis need a cover for their back seat. This would allow guide dogs and their owners to sit together unsquashed in the back seat! Open the door for me before I call the driver back to help

Table 46 - Unsatisfactory features of taxi services, online respondents

What features of Taxi services in Perth and Kinross are UNSATISFACTORY?	
Blairgowrie	Perth
<ul style="list-style-type: none"> • Availability of Taxis around peak periods. The fact that none truly offer a 24 hour service yet state that they do. • Rank in Blairgowrie is not suitable for wheelchair users. • Availability and very pricey for short journeys. • Sleeping in car at rank- smoking in car- seeing one taxi driver using the rank corner as a toilet- no help in or out of the rank - change not given. • Costs...very high. • Availability in Blairgowrie. • Some drivers. • Lack of taxis. • Blairgowrie taxi rank in wrong place. • Vehicles for people with mobility issues. Lowered kerbs to access vehicles. • Pre-covid in Blairgowrie area there was an average waiting time of 30 to 40 minutes to get a private hire or a taxi by phone. 	<ul style="list-style-type: none"> • Not enough electric vehicles. • They constantly drive at excessive speed, drive through red lights, they don't indicate when turning. • Few uniformed drivers. • Very few have screens fitted. • Unavailability at transport hubs. • Cleanliness, dress code, waiting times. • Not enough wheelchair accessible vehicles. • Poor local knowledge. • Poor communication foreign drivers. • High cost. • No payment options other than cash, the waiting times and that all vehicles are nearly booked for school or business contracts meaning anyone else trying to get a taxi have no chance of getting one. Some of the taxi drivers attitudes because it's a short journey and they're not making a fortune from the journey. • All seem to be contracted at school times. General public can hardly access a taxi at these times. <ul style="list-style-type: none"> • Drivers backed up on ranks as not enough space. • Attitude of some drivers. • Lack of shelter from the elements at ranks. • The appearance and hygiene of some drivers <ul style="list-style-type: none"> • Few using their own cars as a taxi, do not know if a taxi or not. • Cost, random car styles / colours - no uniform identity. <ul style="list-style-type: none"> • Drivers who smoke, the cars and driver smell. • Drivers social skills talking to the public. • Sometimes drivers don't talk. • Availability in more rural areas. <ul style="list-style-type: none"> • Public parking in ranks limiting taxis from using. • Too many are far to low and harder to get in and out for the elderly. • Waiting times. <ul style="list-style-type: none"> • Drivers that lack understanding of what guide dogs can and can't do. Drivers that believe they are doing me a special favour by allowing my guide dog in their car. Driver's that only want a particular type of passenger. And small taxis. • Many private hire cars have drivers with poor local knowledge who drive in an unsafe manner - adjusting satnav devices whilst driving passengers. • lack of wheelchair access. • Lack of available maintenance logs for vehicles.

Table 47 - Anticipated use of licensed vehicles, online respondents

In the coming 12 months, as Covid-19 lockdown measures ease, would you anticipate that your use of licensed vehicles would increase, decrease or be similar to pre Covid-19 levels?	Blairgowrie		Perth	
	Increase	9	28.1%	33
Similar	14	43.8%	59	46.8%
Decrease	6	18.8%	23	18.3%
Don't know	3	9.4%	11	8.7%
TOTAL	32	100.0%	126	100.0%

Table 48 - Anticipated use of licensed vehicles, on street respondents

In the coming 12 months, as Covid-19 lockdown measures ease, would you anticipate that your use of licensed vehicles would increase, decrease or be similar to pre Covid-19 levels?	Blairgowrie		Perth	
	Increase	7	13.2%	48
Similar	42	79.2%	106	51.7%
Decrease	4	7.5%	36	17.6%
Don't know	0	0.0%	15	7.3%
TOTAL	53	100.0%	205	100.0%

Online respondents' reasons for anticipated increased or decreased use of taxis were as follows:

Most common reasons given for increased use in Perth were; Previously used buses and are less likely to use buses in favour of using taxis or private hire cars. Taxis and private hire cars are likely to be much cleaner than pre Covid 19, as they are sanitised frequently, so will be safer and more pleasant to use.

Most common reasons given for decreased use in Perth were; I will not be going out as much, to pubs, clubs or restaurants etc, compared with pre Covid-19. I will use a car more often or get lifts from friends or family

Most common reasons given for increased use in Blairgowrie were; Taxis and private hire cars are likely to be much cleaner than pre Covid 19, as they are sanitised frequently, so will be safer and more pleasant to use & Previously used buses and are less likely to use buses in favour of using taxis or private hire cars

Most common reasons given for decreased use in Blairgowrie were; It is likely to be too difficult to obtain a taxi or private hire car when I need one. I will not be going out as much, to pubs, clubs or restaurants etc, compared with pre Covid-19 &

On street respondents were less likely to change the levels of use of licensed vehicles. However, those who felt they were likely to change gave the following reasons:

All of the respondents' reasons given for increased use in Perth were; Previously used buses and are less likely to use buses in favour of using taxis or private hire cars

Most common reasons given for decreased use in Perth were; I will use a car more often or get lifts from friends or family, I will not be going out as much, to pubs, clubs or restaurants etc, compared with pre Covid-19.

Most common reasons given for increased use in Blairgowrie were; Bus services no longer meet my needs, I will be going out more at night and I sold my car.

Most common reasons given for decreased use in Blairgowrie were; Prefer to get a lift from friends or family, or, prefer to get a lift rather than rely on a taxi that I don't know if it is clean.

Table 49 - Residency, online respondents

Are you a permanent resident in the Perth and Kinross Council area?	Blairgowrie		Perth	
Yes	32	100.0%	125	100.0%
No, I am a visitor (on business / personal business)	0	0.0%	0	0.0%
No, I am a tourist	0	0.0%	0	0.0%
No, I am a visitor for another purpose	0	0.0%	0	0.0%
TOTAL	32	100.0%	125	100.0%

Table 50 - Residency, on street respondents

Are you a permanent resident in the Perth and Kinross Council area?	Blairgowrie		Perth	
Yes	53	100.0%	202	100.0%
No, I am a visitor (on business / personal business)	0	0.0%	0	0.0%
No, I am a tourist	0	0.0%	0	0.0%
No, I am a visitor for another purpose	0	0.0%	0	0.0%
TOTAL	53	100.0%	202	100.0%

Table 51 - Gender, online respondents

Which best describes your gender?	Blairgowrie		Perth	
Male	31	63.3%	121	65.4%
Female	17	34.7%	63	34.1%
Prefer not to say	1	2.0%	1	0.5%
Total	49	100.0%	185	100.0%

Table 52 - Gender, on street respondents

Which best describes your gender?	Blairgowrie		Perth	
Male	53	68.8%	198	65.8%
Female	24	31.2%	100	33.2%
Prefer not to say	0	0.0%	3	1.0%
Total	77	100.0%	301	100.0%

Respondents were asked if there were any other comments that they would like to make. The following comments were received. These comments are representative of the range of comments received.



Blairgowrie online respondents, additional comments

- Please carry out an investigation in to the Blairgowrie taxis and their lack of 24 service despite them advertising and claiming that they do offer 24 hours service...
- As I've said on numerous occasions in this survey the Blairgowrie rank has to be moved to a more suitable location for wheelchair users as it is so dangerous crossing roads and trying to dodge busses then when you eventually get to the rank there is no access to get there without help. There is a small shelter with high kerbs again not suitable for wheelchairs. I find it really disgusting that in this day and age that there isn't anything suitable for wheelchair users. Councils should be ashamed of them selves. What happened to equal rights? Sorry, that is just a word that makes them look good
- I have contacted Perth & Kinross council about the taxi rank in Blairgowrie and how dangerous it is to try and get there by crossing a busy main road and trying to get passed a busy bus stance but to no avail. [It] makes me think they are not interested in people with disabilities. Maybe they think we should just stay at home and not use a taxi rank?
- Angie in Blairgowrie is absolutely excellent and offers help whenever it is needed
- Glasgow has/had a much cheaper taxi tariff and encouraged you to use it frequently.
- Taxis within Blairgowrie need a good shake up standards have slipped and there is no cleaning in-between customers they will drop me off and head across the road to pick up another. Also, taxi drivers need to stop sleeping, racing through red lights and stop cursing if they are late due to other road users. Lastly, all smoking in cars with or without customers so be stopped or fined
- A central booking system for Blairgowrie would solve many of its problems in actually being able to pin one down without having to ring around every operator, in hunt the free Taxi game.
- Move the rank in Blairgowrie
- In Blairgowrie I never have any problem in getting a Taxi and all drivers are absolutely willing to help you. I'd be lost without them."

Perth online respondents, additional comments

- I wish Taxis drivers would follow the highway code properly, they constantly drive at excessive speed, drive through red lights and they don't indicate when turning. Driving standards from taxi drivers are very poor
- Get Uber in Perth and Kinross. We are so outdated it's so bad
- Please get more wheelchair Taxis, as this would allow my friend to have flexibility in their days out rather than having to book ahead of time through fear of not being able to get home. Also this

restricts the times we are able to go out, for Hospital appointments, dentist etc

- Taxi drivers deserve their money. Tariffs haven't gone up in years!! They should get a pay rise. I wouldn't mind paying a wee bit more.
 - Reduce the cost making them accessible to people on a low income
 - I have been using the same company now for 20 years and I know most of the drivers, who are polite, helpful, professional drivers
 - Nope, I'm very happy with Perth taxis
 - Feed the drivers the Highway Code book for breakfast lunch & dinner. They'll probably retain more information that way than their current method of learning how to use the roads safely & courteously
 - I use Perth radio taxis at all costs as they are reliable and friendly
 - Integrate taxis to all modes using a smart card. Cost puts a lot of people off, when it is only £2.10 by bus. Making the taxi [fare] the same [and] a big uptake would follow.
 - Tariffs haven't changed for a number of years. A lot cheaper than other cities regions.
 - Are all these surveys read and taken on board?
 - Huge unmet demand, normally school run times, as all tied up with contracts. Encourage companies to have vehicles available.
 - A stricter vetting process for driver suitability
 - Do something about the ludicrous pricing you have set. Genuinely, only Aberdeen is as bad as Perth Taxis pricing is ridiculous.
 - All too often I am advised that there are no wheelchair accessible taxis.
 - Council need to inspect taxi ranks more often and deal with poor standards"
- **Blairgowrie on street respondents, additional comments**
 - Need the current taxi rank to be relocated to the centre of town.
 - Regular provider gives good service
- **Perth on street respondents, additional comments**
 - Need more taxis on Friday and Saturday nights
 - Need more wheelchair accessible taxis available in the mornings

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

Feedback from supermarkets indicated that mobile phones were generally used to book travel by licensed vehicles. None of the representatives contacted were aware of any notable issues with the availability of licensed vehicles for customers. It was rare that customer service desks were involved in helping to book 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. This was the case in both Perth and in Blairgowrie. If a taxi is required in the morning before 10:00 then there can sometimes be a delay or some difficulty obtaining a vehicle quickly. Some of the hotels were close to booking offices and if a guest were to ask about taxis, they would be directed to a booking office.

Public houses

A selection of public houses were contacted to seek their views on the availability of licensed vehicles. All indicated that customers generally managed to obtain a vehicle when they needed one. At closing time, there can often be a longer wait time for a vehicle. None of the respondents indicated that they were aware of any complaints by customers that there were any persistent problems with availability of or level of service provided by licensed vehicles. However, there was some expectation that obtaining one would take longer late on a Friday or Saturday night.

Those premises close to ranks indicated that they thought many of the customers walked along to the rank to obtain a taxi. Although, even those at locations close to ranks, customers would commonly phone to book a licensed vehicle.

In Blairgowrie, late at night it was more common for people to phone for a taxi, than to walk to the rank.

Night clubs

No night clubs were operating during the survey, so no feedback was obtained.

Restaurants

No issues identified

Hospitals

People normally made their own arrangements for taxis. Licensed vehicles frequently set down and pick up from the hospital. No particular problems for most people. Sometimes, if someone needs a wheelchair accessible vehicle in Blairgowrie, it can take a while for it to arrive. However, most trips appear to be booked in advance if a wheelchair accessible vehicle is needed.

Police

Police Scotland indicated that they were not aware of any particular issues with availability of taxis. Normally at pub closing times, there would be a peak in demand and queues would form at taxi ranks and booking offices in Perth. However, this was not noted as a persistent problem. Similarly, the profile of demand was similar in Blairgowrie but no particular issues were noted.

The Police were asked specifically whether, if the cap on the number of taxis which may be licensed were to be lifted in the future, could this lead to problems with organised crime? The Police indicated that they were confident that they had sufficient access to information and tools to deal with any issues which could arise and they did not feel that there was any appreciable risk of issues with organised crime.

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). Their regular suppliers normally had one available. Normally, if needed, transport was booked in advance. Normally care homes had regular suppliers that they used.

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 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. I believe that if more WAV's were available at the ranks then disabled passengers would be more likely to turn up to the rank spontaneously rather than relying on booking private taxis.
- It is not known what the demand for WAV taxis hired from ranks would be.
- There has been improvement over the past few years around safety. We have had no recent reports of concerns around not being clamped into taxis or being offered assistance with seatbelts. There have also been no further reports of people being charged extra for their service due to the time it took for them to get to the taxi or communication problems between the disabled passenger and taxi driver. We know that the disabled people we have spoken to tend to use a taxi company they are familiar with, if they have had a previous good experience with them.
- Occasionally taxis don't turn up and due to this people are missing NHS appointments
- 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.
- NHS wheelchairs are not allowed to have lights added to them which makes it difficult for wheelchair users when travelling in the dark, especially if obstacles force them onto the road for fear of not being seen by vehicles.

- Lack of taxi availability around school contract times, handover times and Sundays remains an issue. 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. Consequently, some people with mobility impairments are more likely to require more frequent taxis and for shorter journeys.
- A lot of members stick to the same company as they have had positive experience with them

The availability of suitable wheelchair accessible vehicles for school transport contracts is limited. This has on occasion led to higher than anticipated costs for some contracts.

This also has knock on impact on others who seek to use wheelchair accessible licensed vehicles during school run times.

Rail and other transport operators

In Perth, at the railway station, there were generally plenty of waiting Taxis, prior to the impact of Covid-19. However, more recently, arriving rail passenger numbers have dropped and the number of waiting taxis has also dropped. There are a few taxis which are often found waiting at the Railway Station rank. However, more recently, it has been more common for there to be no taxis or not enough taxis waiting for arriving passengers on some trains.

Stagecoach buses were contacted and indicated that there were no issues with taxis. The central bus stops in Perth and the bus stances in Blairgowrie were close to taxi ranks, if customers needed to get a taxi.

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 35 valid response to the online questionnaire was received.

Of those 35 responses, 29 were from taxi drivers. Within those 29 taxi drivers, 22 were Perth drivers and 3 were Blairgowrie drivers. The remaining taxi drivers were from other areas of Perth & Kinross.

The majority of analysis of the trade responses deals with Perth and Blairgowrie taxi drivers. The data from other respondents is used later in this chapter.

In terms of typical hours worked, the majority of Perth taxi drivers who responded worked day time rather than night time hours. Working hours per week ranged from 8 to 70 hours per week. Six day working was the most common number of days worked by taxi drivers. For Blairgowrie drivers, the majority of work was daytime hours, with working hours ranging from 23 to 48 hours per week.

Drivers were asked which type of hire best described the type of hire that they most commonly undertook. Amongst the Perth drivers, 68% of drivers most commonly undertook hires for immediate travel, either from taxi ranks or through pre-booking. The majority of Perth drivers' hires were obtained through pre-booked hires and contract hires, rather than from rank hires.

Only two Perth respondents (9%) indicated that they undertook rank hires only. Most of the remaining Perth taxi drivers indicated that they undertook hires derived from a mix of rank hire, pre-booked hires and contract hires.

Three of the Perth taxi driver respondents (14%) indicated that they undertook pre-booked or contract hires, but no rank hires. Perth drivers indicated that they undertook an average of 20.5 hires per day. The majority of these hires were obtained from pre-booked and contract hires.

All of the Blairgowrie drivers indicated that most of their hires were obtained from pre-booked and contract hires. The number of hires obtained from the taxi rank in Blairgowrie was low and accounted for around 11% of all hires, based on the estimates provided by respondents.

Blairgowrie taxi drivers generally worked more night time hours than day time hours. However, the periods worked was fairly closely balanced. For Blairgowrie drivers the average working hours were 58 hours per week. Blairgowrie drivers obtained an average of 12 hires per day, mostly from pre-booked hires.

Respondents were asked how many hires each week required the carriage of a wheelchair. Around a third of Perth 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. All except one respondent indicated that wheelchair user hires were obtained as pre-booked hires.

Blairgowrie drivers indicated that they rarely carried wheelchair using passengers. On the occasions when they did, the trips were likely to be pre-booked.

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 40% of all Perth taxi drivers had regular clients who had a mobility impairment.

No Blairgowrie drivers had regular clients who were wheelchair users, however, most drivers had regular clients who had mobility impairments.

Respondents were asked if the vehicle that they normally drove, was normally driven by more than one driver, during the 12 months prior to the impact of Covid. The majority of respondents in both Perth and Blairgowrie indicated that their vehicle was used by more than one driver, i.e. the vehicle was operating on multiple shifts. When asked if the vehicle was CURRENTLY used by more than one driver, the respondents in Blairgowrie all indicated that the status had not changed since pre-covid times. 42% of the Perth respondents who indicated that their vehicle was driven by multiple drivers, pre-covid, indicated that their vehicle was no longer driven by multiple drivers currently. However, one respondent who indicated that their vehicle was not used by multiple drivers prior to the impact of Covid-19 stated that their vehicle was currently driven by more than one driver currently.

Could you tell us how you feel CURRENT levels of passenger demand relate to pre Covid-19 levels for different types of trip purpose.

Table 53 - Changes in passenger demand, Perth trade

	Increased	Similar levels	Decreased
Leisure related trips (e.g. Friday or Saturday nights to clubs, pubs and restaurants)	0%	16%	84%
Business related trips (people visiting business premises)	0%	10%	90%
Medical trips	10%	20%	70%
Education related travel	0%	35%	65%
Shopping related trips	5%	57%	38%
Trips to and from Railway station(s)	0%	0%	100%

Table 54 - Changes in passenger demand, Blairgowrie trade

	Increased	Similar levels	Decreased
Leisure related trips (e.g. Friday or Saturday nights to clubs, pubs and restaurants)	0%	0%	100%
Business related trips (people visiting business premises)	0%	0%	100%
Medical trips	0%	0%	100%
Education related travel	0%	33%	67%
Shopping related trips	0%	0%	100%
Trips to and from Railway station(s)	0%	0%	100%

If you are a licensed vehicle driver, how do your working hours CURRENTLY compare with those prior to the impact of Covid-19. i.e. over the 12 months prior to February 2020.

Table 55 - Impact of Covid on working hours, Perth

	If you are a licensed vehicle driver, how do your working hours CURRENTLY compare with those prior to the impact of Covid-19. i.e. over the 12 months prior to February 2020.
I have stopped driving temporarily, until demand increases.	18%
I am working fewer hours than I used to.	41%
I am working similar hours that I used to.	23%
I am working more hours per week than I used to.	18%

Table 56 - Impact of Covid on working hours, Blairgowrie

	If you are a licensed vehicle driver, how do your working hours CURRENTLY compare with those prior to the impact of Covid-19. i.e. over the 12 months prior to February 2020.
I have stopped driving temporarily, until demand increases.	33%
I am working fewer hours than I used to.	67%
I am working similar hours that I used to.	0%
I am working more hours per week than I used to.	0%

Table 57 - Knowledge of drivers having left the trade, Perth

	Do you know of any licensed vehicle drivers (excluding yourself) who have stopped driving on a permanent basis?
Yes	68%
No	32%

Table 58 - Knowledge of drivers having left the trade, Blairgowrie

	Do you know of any licensed vehicle drivers (excluding yourself) who have stopped driving on a permanent basis?
Yes	67%
No	33%

Table 59 - Changes in type of work undertaken, Perth

	Have you found it necessary to change the type of licensed vehicle work that you undertake, owing to changes in passenger demand? (For example, working Friday and Saturday nights, when you didn't work those times before, or taking bookings for immediate hire, whereas previously this wasn't the main source of income.)	
Yes		45%
No		55%

Table 60 - Changes in type of work undertaken, Blairgowrie

	Have you found it necessary to change the type of licensed vehicle work that you undertake, owing to changes in passenger demand? (For example, working Friday and Saturday nights, when you didn't work those times before, or taking bookings for immediate hire, whereas previously this wasn't the main source of income.)	
Yes		0%
No		100%

If you have changed the type of work that you undertake, could you describe the nature of changes?

Perth

I am doing more pre-booked hires.

Changing hours, less night work.

I am now getting calls from wheelchair users as the larger offices can't provide a service for them, as they don't have enough wheelchair vehicles. (Private hire owner / driver)

Doing other work to supplement income

Working more through the day as night work has disappeared

I have not worked since pandemic. Am diabetic. Don't feel safe driving taxi [owing to risk from Covid]

Most drivers do less or try to anticipate the busier times

Working approx, 25% more hours for approx 50% less income

Working longer, as the work is not there to earn a living to pay the cost of running.

Gone back to the car mechanic trade

No responses were received to this question from Blairgowrie drivers.

Do any of the existing ranks need to be improved? If so, which and how could they be improved?**Perth**

The rank between Pomarium Flats and Leonard Street is poorly signposted, and as such hugely under-used. The South Street rank seems slightly short for how busy it often is.

Yes, they need an increased security presence, especially at weekends.

Better wheelchair accessibility, perhaps shelters.

South street needs to be position better / common knowledge.

South street rank could do with more space for taxis.

Make more taxi rank space because there are more taxis doing less work.

South street rank. Move the rank back so the 1st car is at the main door [of Tesco]. The rank is a health and safety concern. Pedestrians just walk between cars to cross the road and passengers getting into the front seat are on the traffic side not the kerb.

South Street moved back 2 spaces

Murray st. 13 spaces but you'll be lucky to get 10 cars on it on a good day.

South street needs more space, say 3 cars. Bus station needs to be more visible move it into the bus park or to the front. Potential passengers are missing it and walking to town or the railway station for a taxi. We need another rank maybe round at the bottom of the High Street/ George Street area 3/4 cars .

All need improved. 75 vehicles but around 30 spaces at the very most. Licences increase but there is not enough room for current levels. We have asked for a dedicated WAV rank but been refused on many occasions. PKC licensing are aware of this.

All ranks need to be improved with more spaces allocated. Ranks need to be policed to stop private cars sitting on them. I have been ordered to move whilst sitting off rank at back when there has been private cars on them, but nothing was done to move them off. This applies to all the ranks in Perth City

South Street is too small and in the wrong place, (always has been!)
Taxis sit longer on [ranks. so](#) not easy to get on a rank.

Blairgowrie responses were that the existing rank is in the wrong place.

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

Perth responses were:

A small rank near the Rannoch Road shops would be useful.

I think a rank beside the Concert hall and theatre would be good, especially as Many customers here are elderly and may have mobility problems.

Perhaps at Broxden park and ride.

Supermarkets, because more people would use taxis if they saw them outside supermarkets.

Major supermarkets

Definitely at least another one! !

Mentioned previously, bottom of High Street, George Street, possibly Bertha Park in future .

WAV rank - city centre At least two other city ranks in main shopping thoroughfares or in pedestrianised areas for WAV access and ease.

Yes we need new ranks. How about outside the hospital and also out of town supermarkets

Not at present

No demand for taxi's due to covid

Blairgowrie

No suggestions were provided for Blairgowrie.

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

Under normal, non pandemic circumstances: 8am - 10am [when commuting and school contracts take place], 3:30pm - 6pm [when traffic in Perth is so hellacious, taxis find it difficult to get to pickups], 10pm - 12pm [when the pubs kick out] and 3am on weekends [nightclubs kick out and everyone goes to McDonald's]

During school contract times

Wheelchair users at all the ranks in Perth and Kinross

Friday afternoon

Short time slots at peak times, but not now as I've been working for £3-5 an hour.

Not at the moment

Hahaha, yes, morning school runs and afternoon school runs as all the offices have their cars away.

Saturday late evening for a small time, pubs & clubs closing time like any city in the UK.

School times- we keep WAVs available for hire in these times at considerable expense to ourselves. PKC should incentivise this for new plates to be WAV only

No, there's not enough jobs to cover the number of cars out

Blairgowrie responses

Blairgowrie and surrounding areas

Phones shut down much earlier now due to lack of work

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

77% of Perth respondents said Yes. All of the Blairgowrie respondents said Yes.

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.

Perth responses

A slight drop in trade, due to pubs & clubs being closed down.

Fewer business trips, less airport work, less evening trade, weekend night work has evaporated

Fewer business trips

Accessibility vehicles are in increased demand. As a private hire, I am only allowed to pick up pre bookings.

All types will increase at end of Covid.

Too many taxis.

There will be a decrease in business trips.

Increased office booking with more card payments being asked for.

There will be less demand as people work from home. Business meetings are now done online. Social outings are less no weddings etc. No racing. No football support etc etc.

A lot less work, at least for next 6 months which will take in festive period.

More houses getting built will require better service. Sadly, different rules regarding plates ruins it.

I fear the demand will decrease due to covid consequences otherwise, I think it would have stayed steady as it was. We haven't had a price rise through our own choice since 2012. I was thinking next time maybe put in for a small rise 10 pence a mile or 10 pence on the start price. I think that is unrealistic now.

More card payments, more use of technology such as apps etc. Fares also need to be looked at as it is nearly 8 years since an increase.

I feel that with offices putting on more private hire cars (who poach work from streets around ranks) and because the licensing authority require cars to state that they are only allowed to take telephone bookings, everybody knows [or thinks?] they are taxis and use them [as public hire taxis].

Fewer hires overall.

Business trips are now more or less finished, shops are very quiet, trains are quiet, licenced premises are restricted, in short the industry is on its' knees. All sectors can only get busier than present.

It is slowly getting less and less due to situation. No airport work. contracts have fallen apart. very hard to earn a living.

Until there is a vaccine or a cure for covid 19 there will be little demand for taxi's because people are working from home and the hospitality sector is on very limited opening times.

Blairgowrie respondents

Much less use of taxis

Only do pre booked private hire

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

Perth respondents

It is becoming increasingly difficult to make money, fares are fixed and are being pushed down by so many private hire vehicles, but expenses keep increasing.

Foreign Taxi drivers need to be Tested better when obtaining licence basic English is necessary

Better dressed drivers

I'm working less just now because there's no trade on Sunday morning as people aren't going out, so I'm not going out for half minimum wage.

All struggling to make a living

Blairgowrie responses

There were no responses to this question from Blairgowrie respondents.

Additional comments

Additional comments were supplied, which did not relate directly to the quality of service or levels of unmet demand. These comments have not been included in this report, but have been supplied to licensing officers.

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

Perth respondents

Trade is down, however not so much that I cannot survive. However the traffic situation in Perth is becoming untenable; traffic lights stopping traffic everywhere, roads that are poorly maintained, roadworks appearing everywhere with 0 warning or pre-planning and a larger percentage of the passengers I take are now belligerent and unpredictable, presumably due to increased drug use during lockdown.

The biggest impact had been working from home plus loss of leisure runs.

Hopefully once a vaccine for covid is found business will pick up again

Blairgowrie responses

I will email separately - private hire plates should also be looked at.

Additional comments

Additional comments were supplied, which did not relate directly to the quality of service or levels of unmet demand. These comments have not been included in this report, but have been supplied to licensing officers.

Additional direct trade consultation

In addition to the responses online, informal discussions were held with several drivers at ranks in Perth and Blairgowrie, together with taxi vehicle owners and booking office operators.

In Perth, the drivers on the ranks generally offered similar views to those offered in the online survey. In addition, it was pointed out that very few drivers rely only on rank hires for obtaining work. Almost all taxis obtain pre-booked hires through one of the main booking offices. Many of the taxis are owned and operated by these large operators.

Some taxi operator licences for Perth City are owned in partnership and a lease agreement is in place, where one of the partners pays the other partner a lease payment. There are some operators who object to this arrangement in principle. However, it is seen as the only way that some operators can enter the taxi market in Perth.

Some taxi vehicles are owned by third parties, such as booking office operators. Drivers effectively pay part of their fare income as the rental or commission to the owner of the vehicle. In the recent economic climate, with reduced demand for taxis, some saw this as an ideal means to work in the trade without the commitment to capital investment in a vehicle. This involved less risk, if income was reduced, as drivers could leave the trade and find alternative employment.

Feedback indicated that demand for trips such as airport runs had reduced during the Covid-19 pandemic and had shown little sign of recovering. This left those who focussed on those sectors of licensed vehicle demand, seeking alternative sources of hires, or pausing operations until demand recovers.

Demand at the railway station had reduced significantly during the Covid-19 pandemic. Rail services had increased in frequency towards the conclusion of this survey, however, the number of passengers on each train appeared to be lower than pre-Covid levels.

In Blairgowrie, trade comments focused on the position of the taxi rank. There is a tradition of taxis in Blairgowrie relying primarily on pre-booked hires. The taxi rank is tucked out of the way and drivers may not necessarily go there in expectation of a fare from the rank, but drivers may go there between fares as somewhere to wait. Occasionally this pays off, and a fare is obtained from the rank.

Some respondents felt that a better located and more visible rank location would attract some more demand from the rank, but the primary source of hires would be likely to remain pre-booked hires.

Lack of tourists has significantly hit demand throughout the Covid-19 pandemic. Hotels and bars have been closed or restricted in opening hours and this has reduced demand for licensed vehicles.

The number of drivers operating in Blairgowrie has reduced, and the drivers remaining have been working longer hours to try and maintain earning levels. With lack of night time economy demand has led to reduced availability in the evenings and at night, as some drivers take their time off during these periods.

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 hours a week.

The latent demand factor was added following a court case. It comes from asking people in the on-street questionnaires if they have ever given up waiting for a 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, 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 2021 survey, average passenger delay was 2.17 minutes (2 minutes 10 seconds), this compares with the 2017 survey, when the average passenger delay was 0.12 minutes (7 seconds).

Periods when passengers had to wait for a taxi to arrive at the rank amounted to 16.9% of the observed peak hours. This compares with the 2017 survey result, which was 4.8% of the observed off peaks hours.

27.9 % of passengers travelled in hours when there was an average wait of over a minute.

The demand profile did exhibit highly peaked demand, resulting in a factor of 0.5 being used.

The seasonal factor is 1.0.

The latent demand factor was 1.38

The resultant **ISUD** value of **704.3** 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 of by hailing.

ISUD value, Blairgowrie

For the 2021 survey, average passenger delay was 5.58 minutes (5 minutes 35 seconds). Periods when passengers had to wait for a taxi to arrive at the rank amounted to 6.7% of the observed off peaks hours. 34.6% of passengers travelled in hours when there was an average wait of over a minute, at the rank. 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 1.56 The resultant **ISUD** value of **2,007.7** is greater than the value of 80 that would suggest the observed unmet demand might be significant.

Consequently, the result 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 of by hailing.

This arises from a combination of passengers not using the rank frequently and drivers not commonly waiting at the rank. Consequently, the formula develops a high index value.

The 2021 survey ISUD components are summarised in the following table.

Table 61 2021 ISUD Components

ISUD component	Perth	Blairgowrie
Average passenger delay	2.17	5.58
Off peak hours with observed waiting	16.9	6.7
% of passengers travelling in hours with average queue over a minute	27.9	34.6
Seasonal factor	1.0	1.0
Peak factor	0.5	1.0
Latent demand factor	1.38	1.56
ISUD Calculated Value	706	2,017.9

Table 62 2017 ISUD Components

ISUD component	Perth	Blairgowrie
Average passenger delay	0.12	0.1
Off peak hours with observed waiting	4.80	22.50
% of passengers travelling in hours with average queue over a minute	11.63	7.53
Seasonal factor	1.0	1.0
Peak factor	1.0	1.0
Latent demand factor	1.032	1.021
Overall ISUD index estimate	6.7	17.3
ISUD Calculated Value	6.9	17.3

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.

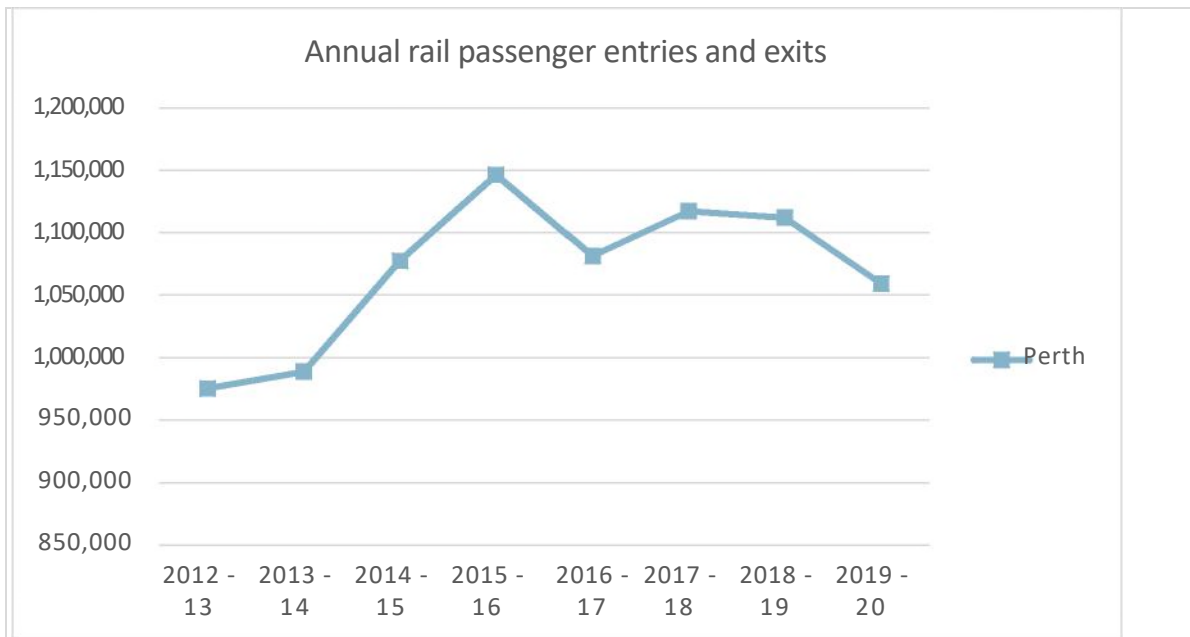


Figure 14 - Annual passenger movements at principal Railway Stations

Data is available for annual passenger numbers each year, from 2012 to 2020. The data for 2019 – 20 was impacted by a drop in patronage in general, during the last quarter, owing to the impact of Covid-19 lockdown measures. The data for Perth Railway Station for 2020 – 21 was not available at the time of writing.

Whilst specific data for Perth Railway Station was not available, there was data for ScotRail passenger totals, which provides a profile of change in passenger numbers over the network as a whole. It is reasonable to assume that passenger numbers at Perth Station would have followed a similar pattern of change during the Covid-19 pandemic.

The ScotRail profile of passenger journeys, per quarter, is presented in Figure 15

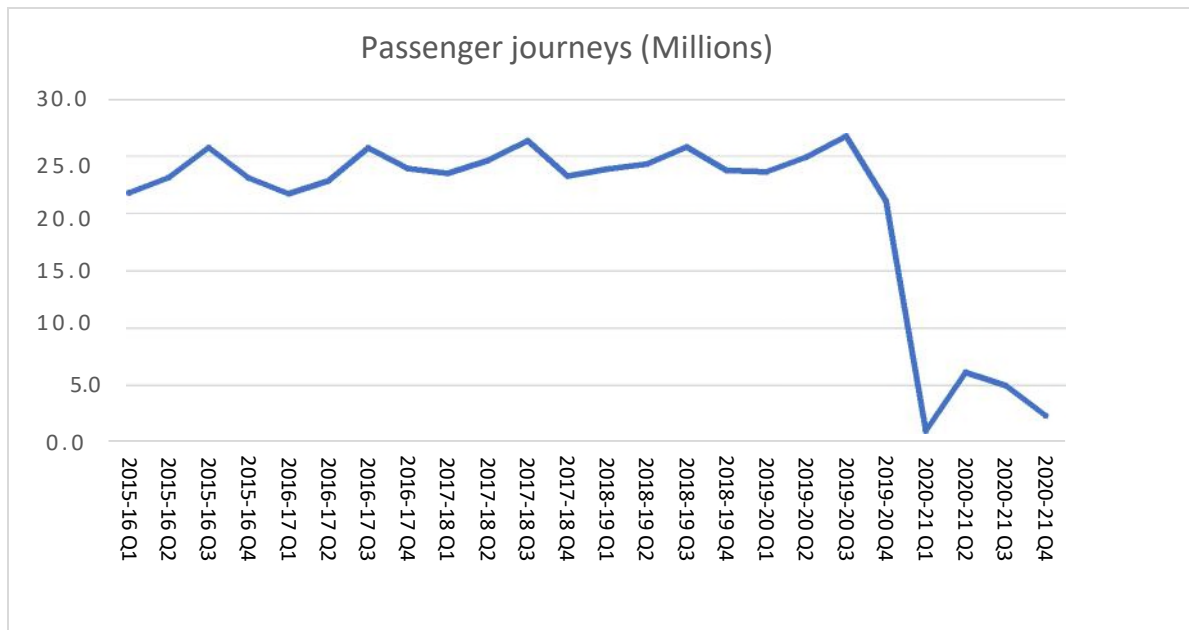


Figure 15 - ScotRail Quarterly Passenger Totals

Across the network as a whole, ScotRail passenger volumes in the 2020-21 year dropped to around 15% of the volume recorded during the previous year. It is anticipated that the number of passengers using Perth Railway Station will have changed by a similar proportion.

8 Summary and study conclusions

Level of unmet demand

The Covid-19 pandemic has had an impact on demand for taxis and licensed vehicles in general and has influenced the level of provision of licensed vehicles. During the Covid pandemic and the variety of lockdown measures which had been imposed since March 2020, the demand for licensed vehicles had been significantly reduced. With reduced levels of income for licensed vehicle drivers and operators during this period, many left the trade either temporarily or permanently, and many vehicles were operating for fewer hours each week, or indeed taken out of service entirely, until demand increased. No taxi plates in Perth or Blairgowrie have been surrendered or not renewed.

The taxi rank surveys were originally programmed to take place during October 2020. However, lockdown measures at that time meant that licensed premises had to close by 10:00 pm. It was agreed to postpone the rank surveys until a more suitable time. The taxi rank surveys were undertaken when Covid restrictions had been relaxed and pubs were allowed to open for their normal licensing hours. However, despite the relaxation in restrictions, it was clear that demand at the taxi ranks, whilst increased compared with earlier in the year, was lower than what was observed four years earlier, during the 2017 survey.

If the 2017 data is taken as an indication of what 'normal' levels of demand for and supply of taxis at the ranks would be, then it was clear that the number of taxis servicing demand at the taxi ranks was also lower than normal.

There was no indication that there had been any reduction in the number of taxis licensed in either Perth or in Blairgowrie. No plates had been surrendered. However, there was some indication that vehicles were not in use as much as during pre-pandemic times.

The type of work undertaken had also changed. A greater proportion of hires were obtained through pre-booking of hires.

It appears that, whilst the number of taxis currently licensed has not reduced, in either Perth or Blairgowrie, the number of drivers operating these taxis does appear to have been reduced. Feedback from the trade survey and anecdotal feedback from members of the trade suggest that some vehicles that had been worked for multiple shifts in the past, with multiple drivers, were now operated with fewer drivers and those drivers often worked for longer hours.

Anecdotal feedback also suggests that the number of active private hire cars and drivers has reduced, compared with pre-Covid times. Booking offices were recruiting new drivers to cater for increasing demand.

The majority of taxi hires in both Perth and Blairgowrie were pre-booked hires. Such hires are fulfilled by both taxis and private hire cars. The lack of private hire and taxi capacity to cater for recovering levels of demand had led to consequent lack of provision of service at the taxi ranks in both Perth and Blairgowrie. High proportions of empty vehicle departures from the ranks, together with the lack of provision during peak periods on Friday and Saturday nights both suggest that the taxi fleet were focussed on servicing pre-booked hires, whilst passengers waited at the taxi ranks.

The lack of provision to meet taxi rank based demand was manifested as extensive passenger waiting at peak times on Friday and Saturday nights, in Perth and passenger waiting at ranks at other times in both Perth and Blairgowrie. **Consequently, the level of unmet demand for taxis at ranks in both Perth and Blairgowrie was above the level which was significant.**

Options for addressing unmet demand

The level of provision of taxis at ranks was not sufficient to meet enough of the patent demand for taxis at ranks, to keep the proportion of passengers who had to wait at the ranks, below a level which was significant. In order to encourage the trade to increase provision at the ranks, and service existing and foreseeable future levels of demand, a range of options are available. Each of these options, have potential benefits and disbenefits associated with them, with respect to public benefit.

Increase the numerical limit on taxi licences

Traditionally, increasing the number of vehicle licences was the primary choice for addressing unmet demand for taxis at ranks. However, with increasing use of mobile booking apps and progressively more sophisticated operator booking systems, increasing the number of licences alone, may not have the desired outcome. Indeed, in some circumstances, an increase in licences may be counter productive, driving more members of the trade to seek pre-booked hires through booking circuits and reducing flexibility to focus on rank based hires.

Increasing the number of licences is a measure which is best applied to a stable situation, where levels of demand and supply are unlikely to change significantly over the short term. In both Perth and Blairgowrie, it is likely that as the economy continues to open up following further relaxation of Covid mitigation measures, more drivers will return to both the private hire and taxi trade and demand from the night time economy, business travel and leisure/ tourism travel will increase. Hence, over the next year or so, the situation is likely to change from month to month.

Raising or removing the numerical limit on taxi licences in both Perth and Blairgowrie is a valid option and one which is worth considering. However, if this is an option which is favoured, then, before implementing

an increase or removal of the limit, it would be prudent to undertake periodic monitoring of taxi rank passenger queueing on Friday and Saturday nights. This may then be assessed to evaluate whether the level of passenger queueing remains at similar levels, increases or decreases over time. The level of passenger waiting should be considered in conjunction with the level of new drivers becoming licensed and any anecdotal evidence of drivers returning to the trade. If, after 6 months, there is no appreciable reduction in the level of passenger waiting and the number of drivers working in the trade does not appear to be increasing to cope with demand, then increasing the number of taxi vehicle licences becomes a more robust and defensible option.

More licences coupled with changed vehicle type conditions

An option that may be considered is to introduce new vehicle conditions in conjunction with new licences. Some licensing areas with numerical limits on taxi licences have increased the limit by stating that any new licences must conform to different vehicle conditions. Most commonly, this relates to new licences would need to be approved wheelchair accessible vehicles.

Revised policies typically may indicate that a new higher numerical limit applies with all of the additional licences conforming to the new vehicle requirements. Alternatively, the limit may be lifted all together with the condition that any new licences, over and above all those already issued, must conform to the new vehicle requirements.

A third option is to apply a new vehicle type policy across the whole taxi fleet. With such an option, all taxis would be approved wheelchair accessible vehicles, without a numerical limit. In such cases, the existing fleet would be allowed several years to continue with existing vehicles and any replacement vehicles on existing licences would need to comply with the new vehicle type policy.

Whilst there is undoubtedly some demand for more wheelchair accessible vehicles in the taxi fleet, these vehicles do not suit all users. Whilst in theory, a mixed fleet of saloon, larger MPV or minibus style and wheelchair accessible vehicles would suit the range of needs of passengers for a variety of trip purposes and requirements, it is not always feasible in practice, to ensure availability of appropriate vehicles to meet the passengers' requirements. A fully wheelchair accessible taxi fleet is often viewed as the least worst solution for satisfying the needs of the widest range of users. Whilst many passengers prefer a saloon car versus a wheelchair accessible vehicle, few cannot use the wheelchair accessible vehicle at all. Whereas, for wheelchair users, some cannot use a saloon car and can only travel in a wheelchair accessible vehicle.

A mixed fleet of newer plate numbers associated with wheelchair accessible vehicles and older plate numbers having 'grandfather rights' to retain saloon type vehicles can often introduce differential plate values

associated with the different types of vehicles. Plates for cheaper to buy and operate saloon vehicles can attract higher values than those for the more expensive to buy and operate wheelchair accessible vehicles. Even in a mixed fleet, where the number of wheelchair accessible taxis is unlimited, any plates with grandfather rights to operate saloon cars can attract a premium value, compared with unlimited WAV plates which have no value.

Do nothing

Leaving the trade to sort out the issues related to under supply of taxis to the ranks at peak times may be an option that is considered. It is likely that the profile of demand associated with some daytime and night time generators of demand will recover to levels similar to pre-Covid times. For example, as night clubs reopen and rail travel volumes increase, the levels of demand on Friday and Saturday nights and at Perth Railway Station are likely to increase. It is also likely that the number of drivers operating will also increase to meet demand.

It is, however, unlikely that levels and patterns of demand will return to precisely the same as pre-Covid times. Some examples of factors which may lead to changed future travel patterns are:

- Rail travel is forecast to initially stabilise at levels lower than pre-pandemic levels. Rail patronage may continue to grow but may take several years to reach pre-pandemic levels again.
- Bus use may not recover for several years, if ever. The trend of declining bus patronage has been accelerated by the impact of Covid. Consequently, the impact of lost revenues may lead to reduced levels of service in the future, unless subsidies can be increased.
- Business travel is likely to be reduced, with video conferencing having become established as an acceptable replacement for face to face meetings, in many circumstances, especially for organisations seeking to enhance their green credentials.
- The hospitality industry may take several years to recover, owing to business closures through reduced levels of income during the Covid pandemic and problems recruiting staff to service existing levels of demand during the recovery phase.
- The Covid pandemic has been seen to accelerate some of the trends in the licensed vehicle trades which have been apparent in recent years. The use of mobile apps for bookings and recognition of passengers' phone numbers in booking systems (leading to more efficient system operation) have driven growth in pre-booked hires in many areas of the UK. Operators with large fleets of vehicles and integrated booking systems have been seen to recover more quickly around the country than smaller operators and independent taxi owner operator businesses. It is widely felt that this has accelerated the growth in user reliance in technology for

obtaining a licensed vehicle, compared with travelling to the nearest taxi rank.

The observations at the taxi ranks found that there were a significant number of intending passengers who left the passenger queues without boarding a taxi. Feedback from the trade indicates that when passengers waiting at a taxi rank call to book a licensed vehicle, they are told to wait at a different location for pickup.

As most hires in Perth and Blairgowrie are pre-booked hires, there is clearly an established culture of hiring licensed vehicles through telephone or app booking or indeed through direct application (and often queueing) at a booking office. If the capacity of booking offices to satisfy demand grows faster than the capacity of taxis at the ranks. Intending passengers may be increasingly likely to go straight to hiring through a booking office, rather than trying a rank. This could become a self-fulfilling mechanism, where drivers returning to the trade, or newly licensed, have to join a booking circuit in order to obtain sufficient hires, as this is where the greatest proportion of hires may be obtained. At busy times, this could even result in the rather absurd situation of lengthy queues of passengers waiting at booking offices for their pre-booked taxi to turn up and collect them, rather than waiting at a taxi rank for taxis to come and pick them up.

Increasingly, for passengers, the use of technology for hiring a licensed vehicle, in particular the use of mobile apps, provides a sense of confidence for their trip, which may not be present with rank based hires. Some systems offer feedback to the passenger, with information about which vehicle is booked for their trip, when the vehicle is expected to arrive to pick them up and updates on the vehicle's current position during the time prior to pick up. Even when the wait time is relatively lengthy, the 'certainty' of the anticipated vehicle arrival time can compare favourably with the uncertain wait for taxis to arrive at a rank.

If no changes are implemented to address the level of unmet demand for taxis at the ranks, then it is likely that over time, the levels of unmet demand will reduce of their own accord. Either because more taxis become available at the ranks, to meet demand, or because fewer passengers attempt to use the ranks to obtain taxis.

If the level of provision at the ranks grows to meet demand, this outcome better serves the public benefit as it meets the requirements of the public. If the number of people attempting to use taxi ranks reduces owing to the expectation that the wait time will be excessive, this would be as a result of frustrating passenger demand and converting patent demand into latent unmet demand for taxis. The problem would not go away, it would merely not be visible in the form of queues at the taxi ranks.

Consideration of other matters raised

Some respondents to the public consultation questionnaires appeared to be of the opinion that taxis were run by the Council and fully under the control of the Council. Some even appeared to believe that taxi drivers may be employed by the Council. Whilst the Council have regulatory powers and may limit certain aspects of the trade, such as maximum fare levels, ensuring drivers and vehicles are suitable for the service provided and limiting the number of vehicles licenced, the Council have no powers to determine when taxis operate, where, within each licensing zone, taxis operate, or any prioritization of services. For the avoidance of doubt, the Council, as the licensing authority, cannot force drivers to work particular hours or service particular ranks.

Feedback from the public and stakeholders suggests that aside from issues with availability, relatively few general use issues were identified.

The feedback identifying negative attributes of services provided was well balanced by positive feedback.

Some feedback was provided by an assistance dog user, through the public consultation, that some drivers are unwilling to accept assistance dogs in the vehicle and that some vehicles are too small or drivers are unwilling to allow the passenger to sit in the front seat, with the dog in the footwell. It was not possible to obtain further corroboration from other sources regarding how widespread these issues may be. However, it is acknowledged that such issues have been manifest in other areas of the country. If any such difficulties are raised more widely in Perth & Kinross, it may be prudent to remind members of the trade about obligations regarding non discriminatory practices towards all members of the travelling public.

There are 10 Wheelchair Accessible Vehicle (WAV) taxis in Perth and 1 WAV taxi in Blairgowrie. There are also WAV private hire cars which, whilst not restricted to localities for operation, tend to serve particular areas. There are 31 WAV private hire cars which serve in and around Perth and 2 which serve in and around Blairgowrie.

Wheelchair users and representatives of mobility impaired users indicated that they face difficulties obtaining taxis during the morning and afternoon school run times. These difficulties are faced by all users and are not limited to any particular sector of the travelling public. However, wheelchair users do face additional challenges with respect to being able to arrange travel on a reliable basis.

Mobility impaired users are often more heavily reliant on licensed vehicles for travel, than the public in general. Some users with mobility impairments can and do use a regular licensed vehicle service provider and pre-book travel. As such they normally feel that they can rely on the service to undertake return trips. However, wheelchair users who need to

remain in their wheelchairs when making a trip by vehicle, have much more limited opportunities for travel in licensed vehicles. Most wheelchair users who need to travel in a licensed vehicle, pre-book travel. However, feedback from consultation indicated that wheelchair users cannot rely on being able to book a wheelchair accessible vehicle for both legs of a return trip. This can lead to significant anxiety in connection with undertaking trips which would be a trivial undertaking for most travellers.

Lack of confidence in availability of wheelchair accessible vehicles and anxiety about arranging travel can discourage travel for all but the most vital purposes. For example, a return trip to a restaurant in an evening may not be bookable in advance for both legs of the trip. So the wheelchair bound traveller faces the uncertainty that even if they make the outbound leg of their evening journey on schedule, they may face significant delays or even no availability of a wheelchair accessible vehicle, for their return trip.

Whilst there can be anxiety over some trips, indications are that for most trips, the level of service for wheelchair users is good and reliable. However, the number of trips by wheelchair users is likely to be suppressed by the limited supply of suitable vehicles and anxiety associated with travel. If more vehicles were reliably available, more wheelchair users would make more trips in wheelchair accessible licensed vehicles.

9 Recommendations

Perth

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 at peak times at the taxi ranks, the only measures open to the licensing authority (The Council) are to consider increasing the number of taxis licensed in each area. There is also an option to introduce further conditions, such as wheelchair accessible vehicles or low emission vehicles.

The number of additional taxi vehicle licences required, to reduce passenger waiting to a level which is not considered significant, can be fairly straightforward to calculate, if we assume that operational practices associated with the new licences are the same as existing. However, some members of the trade may respond by changing how they operate.

The characteristics of applicants for new taxi vehicle licences may vary. Examples include:

- Applications from existing taxi vehicle licence holders,
- Applications from licensed drivers who don't hold a vehicle licence of any type,
- Applications from existing holders of private hire car vehicle licences.

Applicants may intend to operate a newly licensed taxi as an additional vehicle, which is driven by another person on a rental or partnership basis, or, applicants may intend to operate as an owner/driver.

Some licensing authorities issue additional taxi vehicle licences with additional conditions relating to vehicle type. For example, stipulating that any additional taxi vehicle licences could only be for approved wheelchair accessible vehicles, or stipulating additional environmental standards associated with vehicle types, such as Euro 6 emissions, hybrid vehicles or electric vehicles. Potentially combinations of these conditions or additional conditions could be applied. Such conditions would affect the likely take up of additional taxi vehicle licences and how such licensed taxis would be operated.

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.

In order to deal with the peak level of passenger queueing observed, an additional 5 taxis would be required to be working from the ranks on Saturday night. Potentially, the release of a further 5 taxi vehicle licences could address the level of observed unmet demand. However, this assumes that all the newly licensed taxis would operate on Saturday night, or the operating preferences of the newly introduced taxis would displace other taxis, not operating on Saturday night. Such displacement would encourage other drivers to change to operating on Saturday night in response to increased competition.

With respect to the number of taxi licences in the City of Perth, it is recommended that the issue of an additional 5 licences, over and above those already in circulation, is considered at this time.

Blairgowrie

In Blairgowrie, the taxi fleet primarily undertakes pre-booked hires. The number of rank-based hires is relatively low and forms a small proportion of all hires undertaken by Blairgowrie taxis. A limit to taxi numbers should offer some benefit to the public, in terms of reliability of service, quality of vehicles, level of service and driver knowledge, experience and expertise. In Blairgowrie, as most hires are pre-booked, the type of service offered by taxis compares closely with the type of service offered by private hire cars. The limit on the number of taxis in Blairgowrie doesn't appear to offer a benefit to the public, over and above the service provided by private hire cars. Only taxis may wait at and pick up passengers from the taxi rank. However, the survey data indicated that passengers could not reliably find a taxi waiting at the taxi rank.

The number of private hire cars is not capped. Consequently, the availability of vehicle licences to service pre-booked hires is not capped. Much of this market is currently serviced by taxis, in Blairgowrie.

When we consider how many more taxis would be required in order to address the level of unmet demand at the taxi rank in Blairgowrie. We can scale up the number of taxis in effective operation during periods when unmet demand was observed. However, the nature of use of the taxi rank meant that the number of taxis effectively working from the rank was low during these periods. The level of proportionate increase in taxis required would be several orders of magnitude of the existing fleet size. In effect, this would require more licences than were ever likely to be taken up by taxi operators. In effect, to increase the level of attendance at the taxi rank, the number of licensed taxis would need to be increased to a level which saturated the market for pre-booked hires and encouraged more taxis to wait at the rank between hires.

It is worth noting that the number of passengers who were observed to use the rank in Blairgowrie and the frequency of passenger visits to the rank were such that, if a single taxi were in regular attendance at the rank, it could easily cater for all the observed demand at the rank. However, the level of demand at the rank would not be enough, to provide sufficient fares to sustain a single taxi on rank based hires alone.

Key elements to consider in Blairgowrie are:

- The current cap has not ensured a high level of service at the rank in Blairgowrie.
- A large number of additional taxis which would be required, based on current operational practices, to ensure passengers had a reasonable expectation of finding a taxi waiting at the rank.
- The majority of taxi hires in Blairgowrie are pre-booked hires.

The only mechanism open to the licensing authority to address the level of unmet demand is to issue more taxi vehicle licences. Given the elements considered earlier, the level of increase in taxi numbers which would be required in Blairgowrie would be several times the existing fleet size. An increase of this level would be sufficient to effectively remove the cap on taxi numbers in Blairgowrie.

As the observed level of demand for taxis at the taxi rank in Blairgowrie could be catered for by a single taxi, out of a fleet of 12, there seems to be little justification to retaining the cap on taxi licences in Blairgowrie as the majority of taxi hires are obtained through pre-booked hires.

It is recommended that the removal of the cap on the number of taxis which may be licensed in Blairgowrie should be considered.

A common issue identified was lack of reliable provision of wheelchair accessible licensed vehicles at some times of day and in some locations. It is recommended that the Council consider introducing a condition that any new taxi vehicle licences issued in Perth or Blairgowrie, over and above the currently issued licences, should be wheelchair accessible vehicles.

It is recommended that the Council highlight the potential market size for wheelchair users and mobility impaired passengers, with the trade, with the objective of encouraging investment towards targeting this particular market sector.