Appendix 1

Reading
Taxi survey

March 2026

Executive Summary

This Taxi survey has been undertaken on behalf of Reading Borough Council following the guidance of the November 2023 DfT Best Practice Guidance document, and all relevant case history in regard to unmet demand. This Executive Summary draws together key points from the main report that are needed to allow a committee to determine from the facts presented their current position in regard to the policy of limiting hackney carriage vehicle licences according to Section 16 of the 1985 Transport Act. It is a summary of the main report which follows and should not be relied upon solely to justify any decisions of a committee but must be read in conjunction with the full report below.

Since re-applying the limit on hackney carriage vehicle numbers after a survey in 2009, the licensing area has undertaken regular 3-yearly reviews of the level of unmet demand in line with DfT best practice. Neither the 2012, 2015 or 2018 surveys identified any unmet demand that was significant. The 2023 survey identified growing levels of unmet demand leading to a repeat of the survey after two years rather than the (at that time) normal of three, to ensure that unmet demand had not continued to grow and become significant.

For this survey, estimated weekly demand is 3% lower than that recorded in 2023 (a reduced level of decline). In this survey, as in another large authority recent survey, station rank demand decreased despite increased levels of rail users. The level of 40% of rail passengers continuing their journey using one of the three ranks, had reduced to 10%, perhaps symptomatic of increased passenger use of apps to obtain onward travel.

Annually, rank passengers are around 1.13m (measured) with hailed passengers around 0.16m, app-based hirings 440,500 and phone bookings around 882,000, plus 535,000 freephone bookings based on the surveys and results of the public interviews. This suggests the total licensed vehicle fleet of Reading serves 3.14m passengers per year (up from 2.73m).

Passenger satisfaction has increased in this survey. The limit continues to provide public benefit and stability to the entire licensed vehicle trade.

The test has proven that levels of unmet demand have now reduced to a more reasonable level and have not continued to rise. Retention of the limit also requires repeat no more than five years on from the rank survey date of October 2025. Other detailed recommendations are contained in the main report.

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1 General introduction and background

Licensed Vehicle Surveys and Assessment (LVSA) is a joint venture between CTS Traffic and Transportation Ltd (CTS) and Vector Transport Consultancy. These two companies have hitherto been the two leading practitioners of hackney carriage unmet demand surveys in recent years and who joined forces in early 2017. The combined experience of this joint venture covers in the order of 280 similar studies undertaken since 1999. The contracting company for this survey, CTS, also undertook the previous four surveys for this authority, in 2023, 2018, 2015 and 2012, and is aware of earlier surveys, (2009, 2002 and 1997) therefore having unrivalled knowledge of the operation of licensed vehicles in the area.

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

The Best Practice Guidance

This review of current policy is based on the Best Practice Guidance produced by the Department for Transport updated in November 2023 (BPG). It seeks to provide information to the licensing authority to meet section 16 of the Transport Act 1985 "that the grant of a hackney carriage vehicle licence may be refused if, but only if, the licensing authority is satisfied that there is no significant demand for the services of hackney carriages within its local area, which is unmet." This terminology is typically shortened to "no SUD".

The revised and updated version of the BPG published in November 2023 made significant revisions and additions to the overall guidance to licensing authorities and followed a wide (and lengthy) consultation and even lengthier wait for issue of the Final version following the draft publication.

It supplements and complements the introduction of the "Statutory Taxi and Private Hire Vehicle Standards" (STPHVS) document on 23rd July 2020 (see further detail below). None of these resulted in any material change to the elements regarding unmet demand and its review. In essence the new BPG retains much of the material content regarding unmet demand from its 2010 predecessor.

Overarching Background

Current hackney carriage, private hire and operator licensing is undertaken within the legal frameworks first set by the Town Polices Clause Act 1847 (TPCA). This has been amended and supplemented by various following legislation including the Transport Act 1985, Section 16 in regard to hackney carriage vehicle limits, and by the Local Government Miscellaneous Provisions Act 1976 (LGMPA) with reference to private hire vehicles and operations. The LGMPA saw application of regulation to the then growing private hire sector which had not been previously part of the TPCA (and remains outside of it).

Many of the aspects of these laws have been tested and refined by other more recent legislation and more importantly through case law.

Public Experience

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

We accept this is at odds with the current Government strict definition that 'taxis' are hackney carriages (a term they prefer not to use) and all other vehicles are either private hire or minicabs, but a good part of the content of unmet demand work is with those using the service, not those regulating it so we have to ensure those we are consulting with understand exactly what we are discussing with them. There are very few persons outside the licensed vehicle trade who wish to have the exact definitions explained to them.

Taxi Licensing Review

The legislation around licensed vehicles and their drivers has been the subject of many attempts at review. The limiting of hackney carriage vehicle numbers has been a particular concern as it is often considered to be a restrictive practice and against natural economic trends. The current BPG retains the long-quoted comment "most local licensing authorities do not impose quantity restrictions, the Department regards that as best practice" (but continues not to provide any statistical backing for that comment).

The most recent reviews of overall taxi licensing were by the Office of Fair Trading in 2003, through the production of the BPG in 2010, and the Law Commission review which published its results in 2014, the Parliamentary Task and Finish Group which reported in September 2018, the Government Response in February 2019 and the consultation on "Protecting Users" which closed on 22 April 2019 that then resulted in issue of the "Statutory Taxi and Private Hire Vehicle Standards" (STPHVS) on 23rd July 2020.

A fully revised Best Practice Guidance document draft was issued in November 2023 although for the purposes of this Report there is little difference from the content and requirements of the 2010 document. Planned local government reorganisation as well as continued concern over safety and 'out of town' operations are currently under discussion with plans to issue more consultation documents on future licensing imminently.

None of these previous changes resulted in any material change to the legislation involved in licensing.

Other groups have provided their comments (including the Urban Transport Group and the Competition and Markets Authority and most recently the International Association of Transport Regulators), but the upshot remains no change in legislation from that already stated above.

BPG encourages a focus on minimal regulation where that is practicable and policies that will achieve the aims of the licensing authority. It does clearly state that local licensing policy and action is for local licensing authorities and their councillors to determine and drive forward.

Limitation Policy

With respect to the principal subject of this survey, local authorities retain the right to restrict the number of hackney carriage vehicle licenses. The Law Commission conclusion included retention of the power to limit hackney carriage vehicle numbers but utilizing a public interest test determined by the Secretary of State. It also suggested the three-year horizon also be used for rank reviews and accessibility reviews.

The current BPG seeks to align the timeline for refreshing demand surveys with Local Transport Plan revisions, although these are not actually as frequent nor consistent in their timelines as the BPG assumes. The BPG does however clearly state that five years should be the absolute maximum time between a range of surveys including those for unmet demand. It does not preclude earlier undertaking of such surveys if necessary. It would seem prudent for example to repeat surveys in a shorter timeframe were the levels of unmet demand close to becoming significant, or in the case where the level was significant at the survey snapshot.

The latest Government thinking is to move taxi licensing to the around 70 either existing or to be created Local Transport Authorities, but the application of this will be some while away.

Present background to licensing trends

A trend occurred which saw a good number of authorities remove their limits on hackney carriage vehicle numbers in favour of 'quality control', essentially requiring all new hackney carriages to be wheelchair accessible. This led to saloon style vehicles effectively having a limit and also gaining 'grandfather' rights to remain as such, although various developments and changes have been applied. Such requiring of WAV style vehicles is currently more difficult given the pressure on operating costs in conjunction with most WAV tending to be the higher polluting diesel vehicles.

More recent choices have seen authorities wishing to encourage more electric or sustainable fuel vehicles into both the private hire and hackney carriage fleets, although for some this has seen a strong reduction in the hackney carriage fleet numbers, including in London, where many of the remaining non-electric fleet are no longer being replaced when their current limit on age expires.

For Reading, the hackney carriage fleet has long been fully wheelchair accessible principally using purpose-built vehicles, although the types of vehicles able to be included has widened over time away from the standard London conditions of fitness.

Legislative Additions

There have, however, been some actual changes to legislation (not guidance) put in place over recent years.

The Deregulation Act 2015 had two clauses relevant to taxi licensing – relating to length of period covered by licences (Section 10) and allowance of operators to transfer work across borders (Section 11) (both enacted October 2015).

In November 2016, the Department of Transport (DfT) undertook its consultation regarding enacting Sections 165 and 167 of the Equality Act 2010. These allowed for all vehicles capable of carrying a wheel chair being placed on a list by the Council (Section 167) leading to any driver that uses a vehicle on this list having a duty under Section 165 to:

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

Since enactment in April 2017 issues with discrimination have not reduced as much as expected and further change occurred with one of two 2022 Acts put in place (see below).

The two 2022 Acts make small but significant changes. The 2022 Acts are the "Taxis and Private Hire Vehicles (Safeguarding and Road Safety Act) (31 March 2022)" and the "Taxis and Private Hire Vehicles (Disabled Persons) (28 June 2022)".

The first makes it mandatory for any licensing authority in England that has information about a taxi (hackney carriage)(hcv) or private hire vehicle (phv) driver licensed by another authority that is relevant to safeguarding or road safety concerns in its area to share that information with the authority that issued that drivers' licence.

The second amends the Equality Act 2010 to place duties on taxi and phv drivers and operators such that any disabled person has specific rights and protections to be transported and receive assistance when using a taxi or phv without being charged extra for doing so.

Regard has also been had to the Statutory Taxi and Private Standards July 2020 which were published on 21 July 2020 and represented a milestone in transportation regulation, because for the first time the safeguarding of children and vulnerable people were put right at the heart of the taxi licensing system. This publication also noted that a more complete review of all sections of the 2010 Best Practice Guidance would occur in due course and consultation on a draft of this new document ran from March to June 2022.

The "Protecting Users Statutory Guidance" (now the "Statutory Taxi and Private Hire Vehicle Standards" (STPHVS) was issued in July 2020 for application and advice of such application to DfT by the end of January 2021.

For completeness, STPHVS seemed to require by the end of January 2021 the following:

- Making publicly available a cohesive taxi licensing policy document
- Clearly documented ways the licensing authority will share information between relevant stakeholders
- Provision of a robust system for recording complaints that is clearly made known to passengers
- Sufficient training for those making decisions about licence issue
- Clear assessment of option of mandating CCTV in vehicles
- Specific requirements for private hire company records

However, no clear enforcement of this was ever observed and even the focus on the new BPG is now being overshadowed by discussion about local authority reorganisation and the potential shift of licensing not only to the new authorities but also often further up to the relevant transport authority (which are often overarching over large areas).

Further, the plans to introduce Section 161, and the determination of a proportion of WAV that any fleet must have by the Secretary of State (a quota), are a long way from even any consultation being undertaken. This issue was considered by the Law Commission but they stated 'we did not consider quotas of wheel chair accessible vehicles to be a suitable issue for treatment within a national licensing framework' (Law Commission Final Report para 12.60), nonetheless they reiterated that any such quotas should be decided by individual licensing authorities in response to local needs. They also quoted a DPTAC suggestion the quota should be over 30% and that the Joint Committee on Mobility for Disabled People had suggested a minimum of 50% (Law Commission Final Report para 12.61). A 35% quota was suggested by an earlier European Research document – "Economic Aspects of Taxi Accessibility" (International Road Transport Union, 2001).

A much earlier Government plan that all hackney carriages would become wheelchair accessible style also failed to see the required consultation about this occur, and that plan never moved forward. The European Research was one outcome from that proposal, but as already noted its conclusion was that full wheelchair style fleets would rarely be economic in the situation where the provision made was by individuals.

Review of Unmet demand using industry standard tool

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

Some revisions have been made following the few but specific court cases where various parties have challenged the policy of retaining a limit, notably the addition of the latent demand factor with respect to the measurable element of that demand.

This tool effectively summarises the level of service to the public in the form of an index taking into account various elements including average passenger delay (APD), proportion of non-peak hours with APD a minute or more, proportion of all passengers travelling in hours with APD a minute or more, a seasonal factor, a peakiness factor and a latent demand factor. Where the index result is 80 or more this is taken to denote that the observed unmet demand result is significant. It must be remembered that the index is exponential so it can quickly increase as values deteriorate in the direction of unmet demand growth.

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

The DfT asked in writing in 2004 for all licensing authorities with quantity restrictions to review them, publish their justification by March 2005, and then review regularly. The reaction of many authorities to that request was to remove limits.

The current BPG confirms the additional suggestions of how these surveys should be undertaken, albeit in general but fairly extensive terms. A key encouragement within the BPG was that "an interval of three years is commonly regarded as the maximum reasonable period between surveys". The new BPG now encourages all review on a five year horizon aligned with the local transport policy (LTP) for the area. BPG suggests key points in consideration are passenger waiting times at ranks, for street hailings and telephone bookings, latent and peaked demand, wide consultation and publication of "all the evidence gathered".

Unmet demand case history

In respect to case law impinging on unmet demand, the two most recent cases were in 1987 and 2002. The first case (R v Great Yarmouth) concluded authorities must consider the view of significant unmet demand as a whole, not condescending to detailed consideration of the position in every limited area, i.e. to consider significance of unmet demand over the area as a whole.

R v Castle Point considered the issue of latent, or preferably termed, suppressed demand consideration. This clarified that this element relates only to the element which is measurable. Measurable suppressed demand includes inappropriately met demand (taken by private hire vehicles in situations legally hackney carriage opportunities) or those forced to use less satisfactory methods to get home (principally walking, i.e. those observed to walk away from rank locations).

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

In one case it was made clear the current guidance is based on the 2010 BPG, which supersedes previous notes and DfT advice, whilst in another case having a valid survey meant those challenging had no case for their proposed challenge, and in the final case an authority was clearly told they could not rely on a very old survey which itself could not be produced. In the end a fresh survey was undertaken, finding no unmet demand, but undertaken on the established standards only.

A 2023 case which sought to add a non WAV vehicle to a fleet that has a mandatory policy failed, seeing the WAV policy maintenance being supported, but this was in advance of the new BPG which now focusses on wider accessibility albeit ensuring sufficient WAV are provided, but also encouraging a check what the real need of vehicle characteristics is in a licensing area. Again, the focus remains on local provision for local need.

As is usual in a diverse industry, other formal and informal groups continue to suggest potential changes to licensing that might be applied – but none of these, however strongly presented, have any legal weight and must be taken fully in context. This includes various changes arising from need to consider pollution and air quality issues although some elements of this will legally apply, but at a much higher level than specific licensing legislation, which may imply clashes with established legislation and more so present practice.

Cross Border and Sub Contracting Implications

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

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

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

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

The present situation

The days when the main aim of a demand survey was checking if passenger demand had changed to see if supply remained sufficient have now been replaced by a much wider research need to identify both demand and supply side changes (such as drivers working shorter weeks, more time by drivers undertaking contracts or diversifying as delivery drivers, changed passenger use of ranks and locations arising from matters such as reduced rail travel, etc).

Even long-standing areas with limited hackney carriage vehicle numbers have been impacted by having spare hackney carriage vehicle licences available for the first time in decades. However, our experience suggests that even spare plates and reduced demand can still result in unmet demand increasing as a result of change in the range of elements that need to balance to provide better public service.

The upshot of all the changes in legislation with respect to the principal subject of this survey, local authorities retain the right to restrict the number of hackney carriage vehicle licenses.

Conclusions to chapter

In conclusion, the present legislation in England and Wales sees public fare-paying passenger carrying vehicles firstly split by passenger capacity. All vehicles able to carry nine or more passengers are dealt with under national public service vehicle licensing. Local licensing authorities only have jurisdiction over vehicles carrying eight or less passengers.

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

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2 Local background and context

The prime reason for this survey being undertaken in 2025 arises from the conclusions to the 2023 survey that found a strong increase in the value of the industry standard ISUD index from a small number to one heading towards being significant. The previous report stated in the conclusions "There is clearly need to monitor the level of public service by further rank observations perhaps within no more than two years to ensure that the trend towards unmet demand becoming significant does not continue. Interim review might need to see performance indicators such as observance of queues over more periods as warning signs." The licensing authority accepted this conclusion and requested this repeat survey.

Key dates for this Taxi survey for Reading are:

- appointed Licensed Vehicle Surveys and Assessment (LVSA) on 11th June 2025
- in accordance with our proposal of March 2025
- as confirmed during the inception meeting for the survey held on 16th July 2025
- this survey was carried out between July and November 2025
- On street pedestrian survey work occurred in July 2025 (on a Monday)(was in July, 2023 on a Monday and Thursday)
- the video rank observations occurred in early October 2025 (similar to in 2023, when students had returned)
- Licensed vehicle driver opinions and operating practices were obtained during our inception trade meeting and from your in-house survey
- Key stakeholders were consulted throughout the period of the survey
- A draft of this Final Report was reviewed by the client during January 2025 and reported to the appropriate Council committee following that date.

Reading Borough Council is one of six unitary authorities within the former Berkshire county area. The authority has a current latest 2023 estimated population of 178,196 based on projections from the 2021 census. (was 174,200 for 2021 at time of 2023 survey, and 166,100 at time of 2018 survey, both using the initial estimates currently available from the 2021 census.)

With reference to transport policy, the Reading Transport Strategy 2040 (RTS 2040) was published in June 2024. It notes that bus use, walking and cycling accounted for 75% of trips to and from the town centre. Its result is the Reading 2050 Vision in which transport plays a major part, and which will inform the Local Plan.

The document makes it clear that "Public transport policies, including rail, buses, taxis and private hire vehicles, waterways, mobility as a service, shared autonomous vehicles and travel information". The Reading Taxi Associations are named as key delivery partners. The aim is that "future mobility options will enable everyone in Reading to thrive, enjoy an exceptional quality of life and adapt to meet future challenges and opportunities".

It is noted that 'mobility services can bring together public transport, cycle hire, shared taxi hire and micro-mobility options". Policy RTS3 (3.3) states "We will continue to work with partners to deliver public transport, such as bus, community transport and taxi operators, that is affordable and accessible to all and reduces inequalities in our communities."

Policy RTS9 (9.2) "we will dedicate space on the highway to buses or shared with buses, taxis cycles and emergency vehicles, to ensure equality of urban mobility, and to free up space for regeneration of streets with planting and improvements to the public space".

The input in RTS 2040 is copied below:

"Taxis and Private Hire Vehicles

5.37 Taxi and private hire vehicles are a key part of the public transport network providing a service when other modes of public transport may be unavailable, or in areas that the current public transport network may not serve, allowing journeys that may not otherwise be possible to be made by public transport. This reduces the need for people to own private cars.

5.38 Our role seeks to ensure that providers of taxi and private hire services adhere to the quality obligations set out in the relevant licences, and are compliant with all relevant guidance on the conditions that arise from the application of the appropriate sections of legislation.

5.39 Alongside the Police, we can revoke taxi and private hire licences if the licence holder does not meet their obligations. A penalty points system is in place for breaches of regulations, as set out in the licence holder handbook. Through these mechanisms, we will continue to work with taxi and private hire providers to deliver high-quality and reliable taxi services in Reading.

5.40 Technology can play a huge part in making taxis more accessible to people with the introduction of apps, cashless pay systems and enabling ride sharing.

5.41 We are also responsible for providing and maintaining suitable taxi ranks and pick- up points, and we will continue to liaise with operators to maintain adequate and appropriately located facilities across Reading. We will continue to support a shift towards electric taxis and will work with taxi and private hire service operators to identify ways in which we can support fleet changes.

5.42 A new policy has been adopted to encourage taxi drivers to switch to cleaner vehicles to improve air quality and contribute towards the aim to be a carbon neutral town by 2030. We are initially offering incentives in the form of reducing licence fees for the cleanest vehicles. Since April 2020, a 25% reduction in the vehicle licensing fee for all Ultra Low Emission Vehicles (ULEVs) (emitting a maximum of 50g/km of CO2) has been available. A discount of 50% is offered for electric vehicles.

5.43 Additionally, by 2028, all hackney carriages in Reading will be required to be either electric or ULEVs. This is further supported by our EV strategy, which aims to reduce emissions from our taxi fleet, and private hire vehicles.

5.44 This will contribute towards reducing, and eventually removing altogether, the most polluting taxis on Reading's roads, having a positive step towards combating the impacts of climate change.

Policy RTS11 – Taxis and Private Hire

10.1: We will work with operators to deliver smart, accessible and efficient taxi services across the Borough.

10.2: We will work with taxi and private hire services, offering support and incentives to encourage a shift towards the use of cleaner vehicles.

10.3: We will work with taxi operators in Reading to transition to electric or hybrid vehicles by 2030."

It is clear that, against national trends, taxi and private hire services are well supported within the transport policy for the area and clearly laid out in the above policy.

Rank Provision

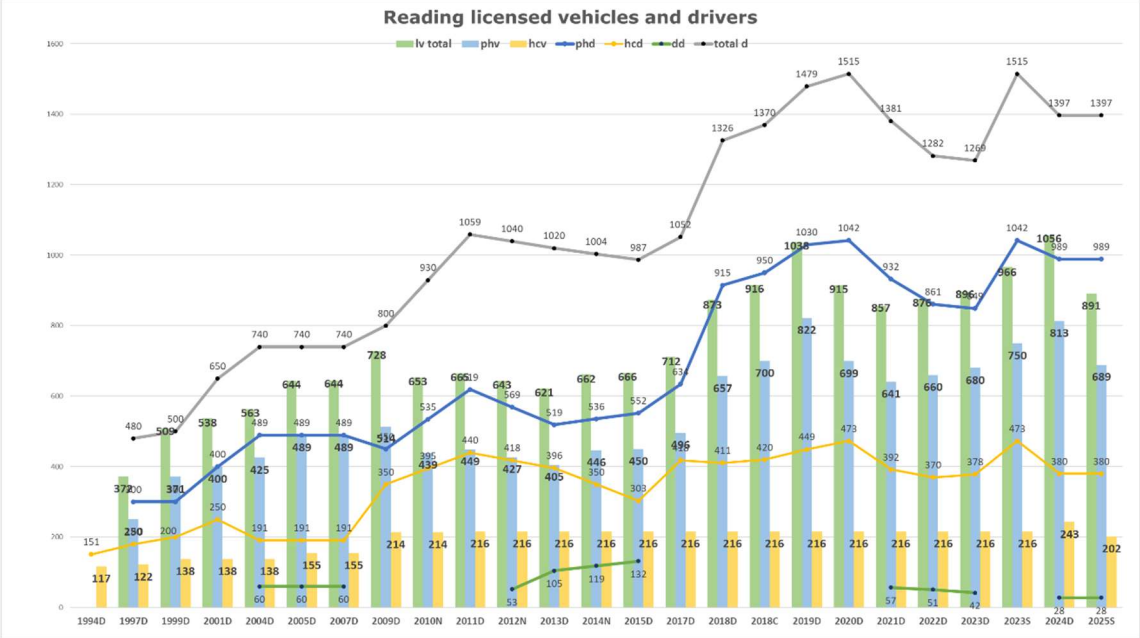
In terms of rank provision, all ranks are provided by the Council itself which is the local highway authority. In 2025 there are no private ranks within the area. All three of the rail station ranks remain on council land even following the redevelopment of the station. Although there was a time between the last survey and now when there was a question regarding the main Horseshoe rank, and access to it, this is now back to the status it had during the previous surveys and is likely to remain thus for the foreseeable future. In 2025, the disruption arising from the large adjacent building works had long ended.

Limits

Reading has chosen to utilize its power to limit hackney carriage vehicle numbers, although it removed its restriction in April 2007 but returned the limit in March 2009 after a further survey. Surveys in 2012, 2015 and 2018 all found the levels of unmet demand were not significant and no requirement existed for any new plate introduction, whilst retention of the limit policy remained possible given the conclusions of no significant unmet demand in the area. Another key fact is that Reading has long held a policy that all hackney carriages must be wheel chair accessible, and essentially London-style. The 2023 survey, however, identified that the industry standard 'ISUD' (index of significance of unmet demand) statistic had increased strongly from a minimal level to one getting closer to suggesting the unmet demand observed could become significant. This led to the early repeat of this survey after two years, not the normal three, and the current BPG maximum of five years.

At the present time, licensing policy aims to see all hackney carriage vehicles ULEV by 2028. The minimum age for a new vehicle is 8 years, with a maximum of 12 which rises to 15 years for ULEV, although the present only vehicle retains a small petrol engine used as a range extender.

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



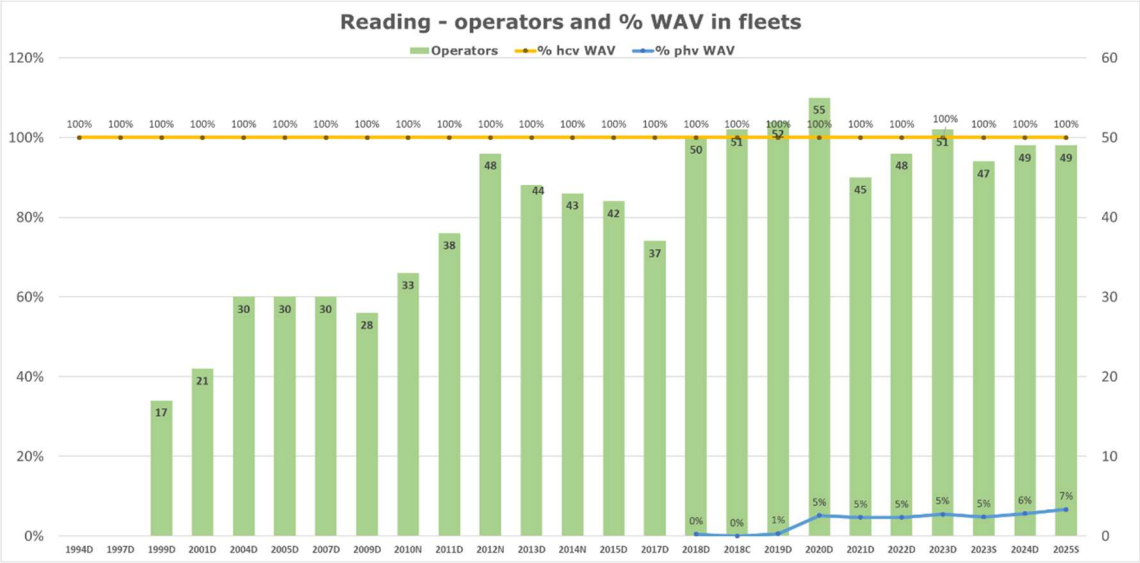
Licensing Statistics from 1994 to date

The graph shows how vehicle numbers were gradually increased up until the limit was removed, with a sharp increase to almost the current level of 216 was set after the 2009 review and reintroduction of the limit.

Interestingly, the period when anyone could have a hackney carriage, as long as it met the current vehicle criteria which were fairly stringent, saw private hire numbers also grow strongly. When the hackney carriage vehicle limit returned, hackney carriage numbers remained fixed with private hire numbers slumping, but then starting to grow again from a low point in 2013. Numbers grew to a peak of over 800 in 2019, but were then knocked back hard by the impact of the pandemic. However, the low point of 641 occurred in 2022 since which numbers have grown again with there being around 750 at the time of the survey compared to the 216 hackney carriages. There was no formal impact of the pandemic on numbers of hackney carriages although it is understood there were some plates which became available but were promptly taken up and added the latest EV style vehicles to the fleet. There were two plates not renewed and one revoked, all three were offered and replaced promptly with new EV vehicles.

Both hackney carriage and private hire drivers peaked just before the pandemic, then dipped but both have now returned to very similar levels to pre-pandemic although perhaps marginally lower.

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



Operator numbers and levels of WAV provision in the fleet

For Reading, the hackney carriage fleet has been fully wheelchair accessible, principally using mainly vehicles also accepted by TfL, for a long period of time. There are a very small number of wheelchair accessible vehicles in the private hire fleet although the actual numbers are not confirmed.

Most private hire operators with need for such vehicles are understood to have arrangements with relevant hackney carriages in order to meet their customer requirements in this regard.

Operator numbers grew from after the last survey, dipped slightly in the pandemic and saw some return, but also some reduction in the latest period for which information was available at the time of the survey.

The licensing section informed us that out of town vehicles regularly are noted in Reading, including from Fareham, New Forest, West Berkshire, Bracknell, Windsor and Maidenhead, Wokingham, South Oxfordshire and Transport for London. Whilst some may be legitimate activity given the large hinterland for Reading, others may seek to gain custom from local trips. This has not changed since the last survey.

With reference to the differentiation of hackney carriage and private hire, other than the distinction that all hackney carriage must be wheelchair accessible, private hire are not allowed to have company names that include either 'cab' or 'taxi'. This is consistent with latest BPG guidance.

Reading undertakes regular review of its policy to limit hackney carriage vehicle numbers in line with the BPG. The previous surveys were in 2023, 2019, 2015, 2012 and 2009, before which as already noted there had been a brief spell of no limit on hackney carriage vehicle numbers. The current survey was brought forward in response to the result of the 2023 survey finding unmet demand to be significant.

Fleet profile

The analysis of the fleet profile that identified a high level of non-owning hackney carriage drivers was not repeated this time. In 2018 there were 45 vehicles that did not have owner-drivers and 39% of drivers had no owned vehicle.

3 Patent demand measurement (rank surveys)

As already recorded in Chapter 2, control of provision of on-street ranks in Reading is under the jurisdiction of the Borough Council, which is the local highway authority as well as being the licensing authority. Appendix 2 provides a list of ranks in Reading at the time of this current survey.

Our methodology involves a current review both in advance of submitting our proposal to undertake this Taxi survey and at the study inception meeting, together with site visits were considered necessary. This provides a valid and appropriate sample of rank coverage which is important to feed the numeric evaluation of the level of unmet demand, and its significance (see discussion in Chapter 7).

For 2025, the ranks to be covered were reviewed in advance of the observations being undertaken with both the Trade and the licensing team.

There were no changes since the 2023 survey apart from the main station rank now being unaffected by the road works which were there in 2023, although checks found they did not impact overall public service levels.

General statistics of the rank survey

Checks were undertaken of the main raw rank data. For the 2025 survey, some 32,961 events were recorded at the ranks. Of these, 29.5% were arrivals of passengers at the ranks, 0.5% pedestrians leaving the rank without taking a hackney carriage and 35% (each) were vehicle arrivals and vehicle departures with or without passengers.

The vehicle arrivals and departures totalled some 23,053 movements, or 70% of the activities (as noted above). Of these, 90% were hackney carriage movements, with 9% being private car movements. Emergency vehicles, private hire, out of town licensed vehicles and goods vehicles were all observed, but none made up more than 0.5% of the total movements (that latter value was emergency vehicles, nearly all near the Quicksilver rank).

In terms of passengers observed leaving ranks without taking hackney carriages, the total for the survey period for 2025 was 217, relatively small and just 2.2% of the total of arriving passengers. Over half of these were at the Horseshoe rank, with the next worst location being Quicksilver (17% of the total).

Rank hours included

Whilst the total hours covered by video remains the same as in 2023 and 2018, the level of active hours overall has changed. In 2018, 734 hours were drawn into the detailed analysis for unmet demand. In 2023, this rose to 750 hours. In 2025, the level reduced to 688 hours. In all other hours there was no activity, either vehicle or passenger at the site. Further discussion of this occurs in various sections below.

Disability Usage

Over the survey days, seven people in wheelchairs were observed accessing hackney carriages, with five at the Horseshoe, one at Friar Street West and one at Station West. A further 74 persons were observed receiving assistance (having sticks or walking aids) – with 33 at Friar Street West, 15 at Station Road, 11 at the Horseshoe, 10 at Station North, four at Station West and one at Tesco Oxford Road.

Overall survey results

The observations from the rank surveys were analysed and overall estimates produced for an average weekly level of demand at each rank. To validate this information and understand current levels of usage against those from the past, information from the previous surveys has been included. The overall results are shown in the table below.

Rank	Pass/wk 2025	Pass/wk 2023	Pass/wkeek 2018	Pass/wkek 2015	Pass/wk, 2012	Pass/wk 2009
Horseshoe	8,820 (40%)	11,628 (52%)	10,584 (42%)	11,719 (40%)	15,830 (59%)	69%
Station West	2,639 (12%)	2,948 (13%)	3,217 (13%)	1,553 (5%)	n/a	n/a
Station North	2,462 (9%)	2,582 (12%)	2,296 (9%)	2,507 (8%)	n/a	n/a
(all three above station ranks)	***13,920 (64%)***	***17,158 (77%)***	***16,097 (64%)***	***15,779 [53%]***	***15,830 [59%]***	***[69%]***
Gun Street	1,561 (7%)	1,551 *(7%)*	915 (4%)	414 (1.1%)	1,854 (7%)	
Pitcher and Piano	2,068 (9%)	1,052 (5%)	2,588 (10%)	4,018 (14%)	3,472 (13%)	
Quicksilver	3,053 (14%)	940 (4%)	1,695 (7%)	2,289 (8%)	1,010 (4%)	
Headmasters	829 (4%)	673 (3%)	1,840 (7%)	2,418 (8%)	620 (2.25%)	

Royal Berkshire Hospital	10 (0.03%)	583 (3%)	410 (2%)	264 (1%)		
Royal Berkshire Hospital Maternity	61 (0.3%)					
Station Road	271 (1%)	460 (2%)	564 (2%)	1,057 (4%)	2,223 (8.3%)	27%
Oxford Road	0	10 (0.0)	Unused	125 (0.4%)	84 (0.3%)	
St Mary's Butts 24-hr	5 (0.02%)	0	361 (1%)	342 (1%)	12 (0.05%)	
Casino	0	0	35 (0.1%)	67 (0.2%)		
Minster St, 2018 see Gun St above		0		18 (0.1%)		
Bridge St (rest rank only from 2018)	5 (0.02%)	0		268 (1%)	344 (1.3%)	
Oracle and Yield Hall Place (private) feeder	Gone	Gone	752 (3%)	2,397 (8%)	132 (0.5%)	
Oracle Feeder, for 2018 see Oracle rank above)	Gone	Gone		13 (0.0%)	1,057 (4.3%)	
King Street	Gone	Gone		48 (0.2%)		
Total est weekly demand	***21,781***	***22,427***	***25,255***	***29,516***	***26,638***	***17,600***
Growth from previous	***-3%***	***-11%***	***-14%***	***11%***	***51%***	***n/a***
Growth from 2009	***24%***	***27%***	***43%***	***68%***	***51%***	***n/a***

Since the last survey, overall usage of hackney carriage ranks in Reading has reduced by a further 3% (11% and 14% previously). However, this still remains 24% higher than the low values identified in the 2009 survey, but 26% less than the peak of 2015. Station Road has also continued to decline. This has contributed to the reduced number of hours taken through to the analysis for unmet demand.

The total passenger flow through all three station ranks over the survey period decreased, with the total station demand now being back to the 64% of all passenger demand from 2018. The other rank flows therefore actually increased by some 49% from 5,269 to 7,861.

In this 2025 survey, three ranks have increased patronage – Pitcher and Piano up from 5% share to 9%, Headmasters from 3% to 4% and most notably Quicksilver from 4% to 14%.

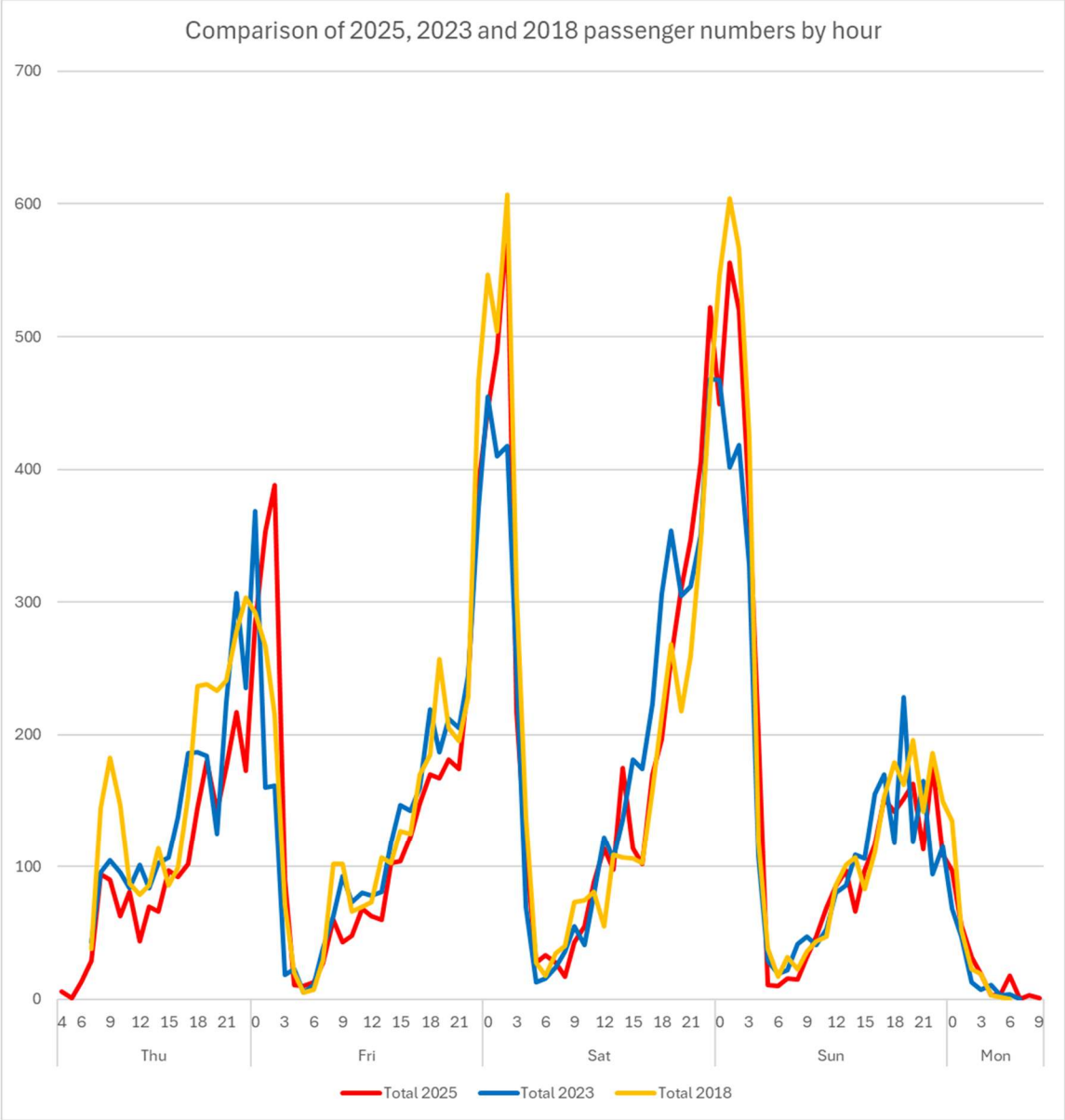
The hospital rank has reduced, with most usage being at the Maternity portion of the rank. This also contributed to the reduced hours available for analysis.

It should be noted that if the estimated passenger numbers are divided by the average occupancy of 1.5 passengers and then shared between the 202 hackney carriages available at the time of survey, and then spread over a seven day week, this implies rank work is providing just ten paid fares per day per hackney carriage (very similar to 2023).

That is not a high level and suggests vehicles need other business (hailing, apps are used, some take bookings, and some have contracts), but it is clear relying on rank work alone would not provide sufficient remuneration.

Total passenger flows

Data for all ranks were combined to create a total passenger profile for the full survey period. This does not allow for cases where some sites were only covered on some days, but in general a similar sample was collected for all surveys from 2015 onwards hence data for different years are generally comparable. The exceptions will be where sites have ceased to be active, such as Station Road and the main hospital rank on particular days or over particular periods. The graph compares information for 2025, 2023 and 2018.



The profiles are remarkably similar particularly given the pandemic in between the first two sets of data. What is most notable is that 2025 and 2018 are more similar for the overnight flows Friday to Saturday and Saturday to Sunday than either are to 2023. This suggests demand patterns are closer to pre-Covid now than two years ago. However, Thursday differs in that daytime flows are lowest in 2025 than either 2018 or 2023 yet the overnight peak increased in 2023 and did so again to 2025.

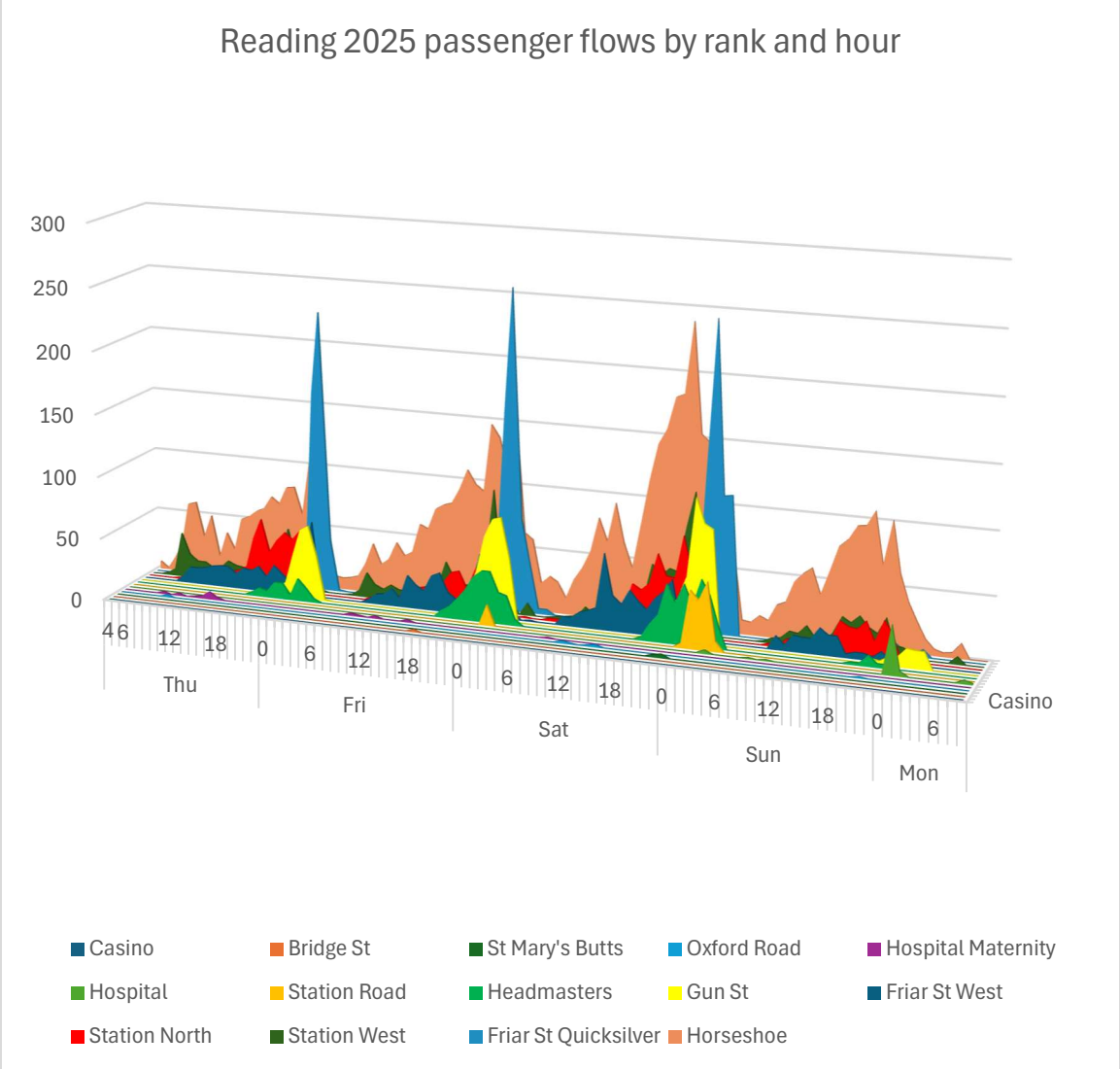
Friday daytime flows also appear lowest in 2025, whilst those in daytimes Saturday tend to be higher. Sunday flows are much more similar between years.

In 2025, the highest hourly flow over the survey period is in the 02:00 hour early on Saturday morning. This is the same as in 2018, but marginally lower. Remarkably, the second highest passenger number is 01:00 in the early hours of Sunday both in 2018 and 2025. In 2023, the second highest flow was just an hour earlier at Saturday midnight.

The overall average passenger flow over the same survey period fell from 161 in 2018 to 148 in 2023 to 147 in 2025, only a marginal difference. However, the peak flows differ more, with 2018 being highest at 607, 2025 second highest at 585 and 2023 lowest at 468. The peak to average ratio in 2025 is the highest of the three years, 3.97, compared to 3.76 in 2018 and 3.16 in 2023. This seems to confirm the conclusion that patterns of demand now are much more similar to those pre-Covid than in 2023.

Contribution of individual ranks over time

The separate rank demand by hour was plotted for the survey period to demonstrate how each separate rank contributed to the total demand for each hour. With the extensive level of surveys undertaken, this picture is comprehensive for the days covered. It clearly shows the range of ranks contributing to the overall total.



The graph also clearly shows the dominance of the Horseshoe rank whilst most of the other ranks also contribute well to the overall total passenger service in the central area, as in 2023. The notable change for 2025 is the high usage of the Quicksilver rank at three peaks early each morning, including the early hours of Friday. Gun Street also sees similar high usage levels even including the early hours of Monday morning. The Headmasters rank is also important but to a lesser degree.

Whilst Sunday is clearly a much quieter day, mainly dominated by the Horseshoe demand and the other two station locations, in 2025 it almost has higher demand than the Thursday, particularly related to the main station rank – which might relate to people returning after weekends away.

Incidence of passenger delay

From all the information gathered, totalling some 688 (750 2023 and 734 2018) hours of observations across all operational ranks in Reading, there were 2% (5% 2023 and 2% 2018) of hours when there was an average passenger delay in that hour of a minute or more. A further 9% (10% 2023 and 13% 2018) of hours saw average passenger delays less than a minute. This means that 89% (85% 2023 and 2018) of all passengers travelled in hours when there was no delay at all.

To further clarify the number of people affected, 0.9% (7.7% 2023 and 4% 2018) of all passengers experienced an actual wait of a minute or more. There was just three (59 2023 and 18 2018) people in total who experienced waits of 11 minutes or more. While in 2025 these were in just two (three 2018) hours, in 2023 these waits were in eight different hours.

The worst APD value was four and a half minutes (just under seven minutes in 2023). This affected one passenger but was the result of thin demand, with that person being the only one travelling in that hour at that location. There were just four (compared to fourteen in 2023) hours with APD two minutes or more.

Review of activity level for hackney carriage vehicles

For this survey, as was undertaken three years ago, a review was undertaken of the level of activity of all hackney carriage vehicles during the days of the rank survey. Samples were collected on the Thursday and Friday of the survey, with the Thursday also identifying overall waiting times for vehicles servicing the Horseshoe rank from the feeder at Station West.

The Thursday saw typical waits from arriving at Station West feeder to leaving the Horseshoe of 31 (26 2023, 40 2018 and 24 2015) minutes during the 10:00 to 11:00 period. The next sample found typical waiting times of 36 minutes (32 2023, five or six in 2018 and 20 in 2015) from 13:00 to 14:30. The final sample found average waits of 14 minutes in the 16:30 to 18:00 period, and much more consistent than in 2023, and less than the 24 minutes of 2015.

This demonstrates a range of wait times which are not always predictable given different train loadings and impact of rail delays that can occur at any time, although much more consistent for 2025 than in previous years.

In 2025, 64% (58% 2023 and 39% 2018) of the fleet were seen on the Thursday, 22% (16% 2023 and 2018) on the Friday and 25% on the Saturday, 75% (90% in 2023 and 2012) over all three days.

Rail Stations

For the latest rail station patronage information, that covering the period ending at the end of March 2025, there are three stations within the Reading authority area. The main Reading station is currently 33rd (was 29th in 2023) highest in total passenger flows within the UK database. The level of usage dropped during the pandemic to 17% of the value seen to the end of March 2017, the peak level observed in the database. The present year values are 84% (was 73% 2023) of that value, still some way behind pre-pandemic levels, or down 16% (27% 2023). The current total of entries and exits per year is just over 14.3 million passengers.

Taking the total estimated weekly passengers using the three ranks at the main Reading station suggests that 10% of these departing passengers leave the station in a hackney carriage from the rank.

Summary

For 2025, service to ranks appears to have returned closer to that observed before the pandemic although there have been detailed changes to which ranks have different levels of passengers. Patronage at the station ranks has decreased whilst that at central ranks has increased. This is a pattern also seen in 2024 survey in another large English City.

4 General public views

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

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

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

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

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

More recently, general public views have been enlisted from the use of council citizens' panels although the issue with these is that return numbers cannot be guaranteed. The other issue is that the structure of the sample responding cannot be guaranteed either, and it is also true that those on the panel have chosen to be there such that they may tend to be people willing to have stronger opinions than the general public randomly approached.

Finally, some recent surveys have placed an electronic copy of the questionnaire on their web site to allow interested persons to respond, although again there needs to be an element of care with such results as people choosing to take part may have a vested interest.

For this survey, 197 (198 in 2023 and 199 2018) people were interviewed around the central area of Reading. For this survey, there was 6% higher level of response from females (2% 2023 -11% in 2018). The census share has remained 50/50 over that entire period.

In terms of age structure, there were more of the two higher age groups and therefore 16% (9% 2023) less of the under 30's interviewed (13% (19%) compared to 29% (28%) in the census). In 2018 more of the two lower age groups and less of the older group were interviewed. For the over 55 group, 30% (32% 2023 and 14% 2018) were interviewed compared to 26% (27%) in the census (27% both for 2023 and 2018), whilst the under 30 group saw 13% (19% 2023 and 33% 2018) compared to 29% (28% 2023 and 29% 2018) in the census, and the mid group 57% (49% 2023 and 53% 2018) compared to 45% in the census (again same in previous years). This should not adversely affect the overall results but needs to be borne in mind.

90% (87% 2023 and 73% 2018) were from the Reading council area. The remaining respondents were from various places mainly around the London area as previously.

Of the respondents, 60% (71% 2023, 30% 2018, 24% 2015, 52% 2012 and 55% 2009) said they had used a licensed vehicle in the Reading area in the last three months. This split to 23% (36% 2023) by hackney carriage only, 22% (17%) by private hire only and 16% (18%) by both types of vehicles.

Almost all (all, 2023, 35% 2018) of those interviewed told us their level of usage. This resulted in an estimated 1.2 (0.9 2023, 1.1 2018, 0.9 2015) trips by licensed vehicle per person per month.

The most frequently quoted usage was 23% saying once or twice a month, as in 2023 (38%) and 2018 (26%). 30% (10% 2023) said never.

A similar question was asked but focussing on hackney carriage usage only. The response saw 17% (20% 2023 and 31% 2018) saying once or twice yearly and 16% (36% 2023 and 29% 2018) saying once or twice monthly, with the overall level of trips per person per month being 1.0 (0.84 2023 and 0.4 2018). This suggests that 82% (90% 2023, 34% 2018) of all licensed vehicle trips in Reading are made by hackney carriage. This is again the highest value quoted in any known survey.

However, for this survey, 4% (as in 2023, but none 2018), said they could not remember when they last saw a hackney carriage, and 36% (16% 2023, also zero in 2018) when they last used one. Both, as in 2023, seem contrary to the apparent increased usage of hackney carriages.

When people were asked how they normally got a licensed vehicle, 56% (99% 2023 and about a third in 2018) of those interviewed gave information. For this survey, 5% (6% 2023) gave three responses, 29% (23%) two and the remaining 67% (70% 2023 and 54% 2018) just one option. Considering all responses, 36% (38% 2023, 44% 2018, 39% 2015) said a rank, 28% (32% 2023, 33% 2018) telephone, 17% (12% 2023, 10% 2018) an app, 5% (18% 2023, 9% 2018, 7% 2015) hailing and 14% a freephone (none, 2023).

The joint response for hackney carriage usage (41%, 56% 2023) is lower than the 82% (90% 2023) from the trip-making question suggesting more frequent use of ranks in Reading by those using them. The proportion of vehicles in the fleet is lower again than this, with 23% (24% 2023 and 39% 2018) of the current fleet being hackney carriage.

People were then asked what companies they would phone if they obtained a licensed vehicle by phone. 24% in 2025 (63% 2023 and 18% 2018) of interviewees gave an answer. Of these, 2% (16% 2023 and 14% 2018) gave three names, 65% (27% 2023, a third 2018) gave two names and the remainder just one name. Overall, there were 81 responses compared to 201 2023, 58 2018 and 20 2015.

For all the responses, twelve (as in 2023, 11 2018, 14 2015) companies were named (eleven of which had been suggested as likely by the Council). In 2025, the top two responses gained 44% and 35% of mentions (29% and 21% 2023, 19% and 17% 2018 and 16% and 14% 2015), 79% for the top two in total (50%, 36% and 30% previously). This suggests continuing agglomeration of private hire provision.

The top company mentioned in 2023 was not mentioned at all in 2025, whilst the top company had been second in mentions in 2023. The second company in 2025 had been fourth equal in 2023, rising from 8% then. The third company stayed the same with an increase from 2% of mentions to 6%. Fourth company was also the same, but lost share from 14% to 4%.

When directly asked specifically about app usage, 54% quoted an international app; 24% an app for a company not quoted in the 'company' names, and 21% named a hackney carriage app. In 2018, 14% each had named two hackney carriage apps, but this had reduced to one in 2023.

For this survey a slightly different method was used with regard to ranks. A list was provided of the main ranks (but only to the interviewer unlike in 2023 when it was shown to most respondents) and people were asked to say what ranks they were aware of (the list only being used this time to validate) and if they used them or not. 70% (73% 2023, 24% 2018) of those interviewed provided a response, with all of those responding giving a view of use or non-use for all ranks. No extra ranks were added at all, as in 2023.

For this survey, 1% named five ranks, 1% four, 4% three, 19% two and 75% just a single rank. In 2023 people were shown the listing and all responded about every rank. In 2018, 4% of those responding gave three locations, 38% gave two and the rest just a single location.

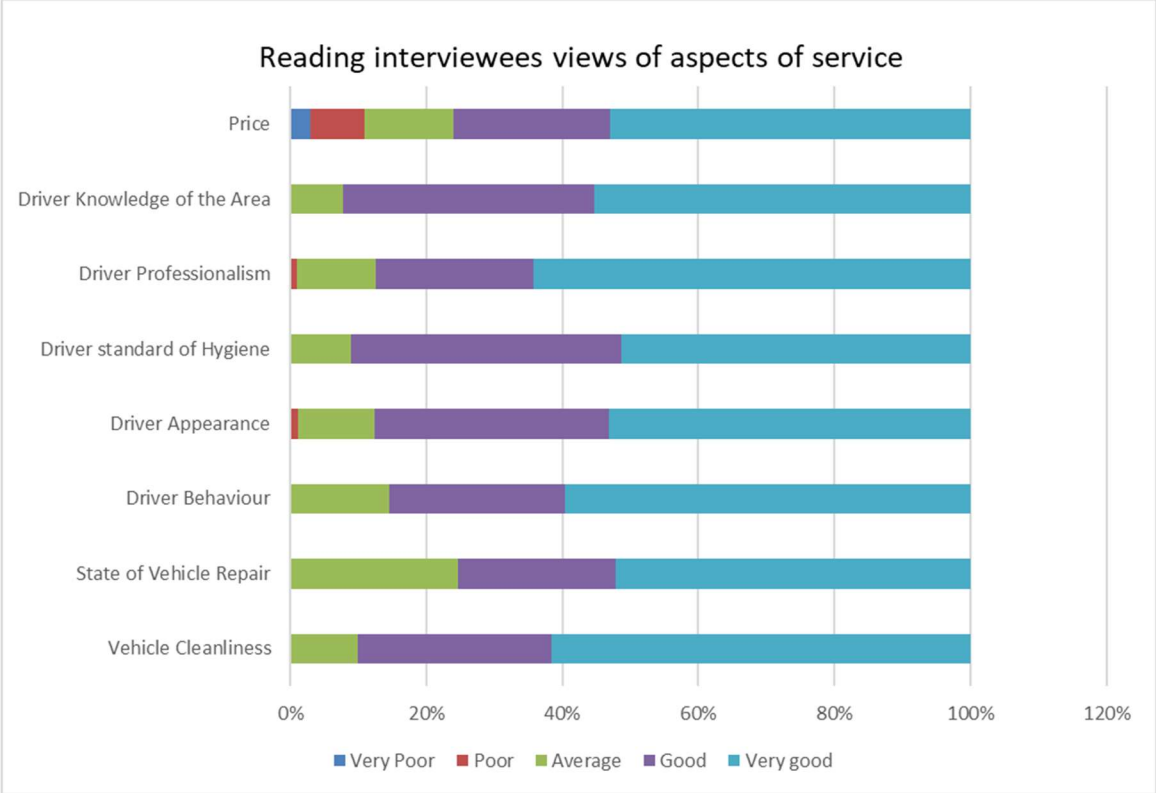
In 2025, top rank named was Station Hill, gaining 60% of mentions (9% 2023). Station Road was second with 13% (42% 2023 and 40% 2018, 59% 2015) and Friar Street Quicksilver third with 10% (8% 2023, just 'Friar St' 2018 13%, 2015 12%). The Hospital rank gained 5% (11% 2023), Station North 4% (7% 2023, 13% 2018), the Casino 4% (3% 2023), Friar Street Pitcher and Piano 2% (same 2023 and 2% 2015), Headmasters 1% (23% 2023) and the Horseshoe just 1% (7% 2023, 30% 2018). In reality, very few people will actually know the difference between Station Hill, Station Road and the Horseshoe ranks.

Taking all station values together, 2025 sees 65% (2023 64%, 2018 83% and 2015 66%), generally similar values over time, and confirming that differentiating the locations is actually irrelevant to actual public understanding.

For this survey, the average level of people saying they used a rank was 77% (15% 2023, 89% 2018)(the change a function of the different methods of asking the question). The total number of mentions in 2025 was 183 compared to 70 in 2023. In 2025, most of those quoting ranks said they used them. Friar Street Quicksilver saw 79% say they used it, with 65% saying they used Station Hill.

People were then asked their ratings of various aspects of their most recent trip by hackney carriage, ranging from very poor to very good. For 2025, there was a range of response to different questions, with 52% responding re driver knowledge, 51% price, 48% driver professionalism, 46% vehicle cleanliness, 45% driver behaviour, 41% driver appearance, 40% driver hygiene and 35% vehicle repair. In 2023, 93% responded across the board, compared to just under a quarter in 2018.

The diagram below summarises current responses:



2025 views always scored 'very good' the highest proportion. Only three categories obtained very small poor scores, and only price gained a very poor score of 3%. This shows a strong improvement since 2023 when the overall view was that most aspects were poor, with price and state of vehicle repair tending more towards average. This is also better than the situation in 2018 when most apart from price saw good scores. 2025 and 2023 both saw the highest very good for driver knowledge (52% 2025, 18% 2023).

When asked about what might encourage people to use hackney carriages or to use them more often, 77% (81% 2023) responded. 70% named one reason, 28% two and 1% three.

Overall, 62% (82% 2023, 35% 2018) said only more affordable fares would increase their usage. This remains a strong statement.

No other factor scored highly apart from 12% who said more hackney carriages they could phone for (25% 2018), better vehicles 8% (18% 2018), better drivers (3%), more hackney carriages to hail or at ranks (3%, 16% 2018), and able to pay by electronic means 2% (12% 2023).

The level of people saying they did not need an adapted licensed vehicle rose from 71% in 2018 to 82% 2023 and 78% in 2025, suggesting marginally increased need of adapted vehicles now. This time a high 16% said they needed a WAV, with the other 5% saying they knew someone that needed a WAV (13% 2023 and 27% 2018). This suggests the fully WAV policy remains appropriate.

Latent demand was then considered. People were asked if they had ever given up waiting for hackney carriages either at a rank or when hailing. If they responded that they had, they were asked where to check the validity of their response.

Eleven (six 2023) had given up, but none stated where they had done this. This implies a worst-case latent demand factor of 5.6% (3.7% 2023, 2018 rank only 1.5%, combined rank and hail 3%). The value is still much reduced from the 9% obtained in 2012.

Most of those telling us how they got home when they gave up waiting for a hackney carriage said they walked away and hailed (55%) whilst 45% made a booking. In 2023, respondents said they used public transport, about half used buses and half used train.

When asked if there were enough hackney carriages in the Reading area, 87% (90% 2023, 16% 2018) responded, with 91% (59% 2023 and 60% 2018) saying there were enough and the balance saying there were not.

People were asked if they considering they knew the difference between a hackney carriage and a private hire vehicle in Reading. All but two interviewees responded, with 78% (82% 2023) saying they felt they did know the difference.

Statements were then provided to test their knowledge. These were shared with the licensing department who defined their current view of what answers would be correct for Reading at this point in time.

100% (96% 2023) of those responding correctly said hackney carriages were black cab style. With regards to having a taxi roof sign, all said they did (in 2023 people had been less correct with 43% said hackney carriages, correct, but 54% said both, and five said private hire). This is a marked improvement since 2023.

However, 90% in 2025 thought that hackney carriages had a door sticker giving company name, although this was only nine people. In 2023 (94% 2023) correctly understood that only private hire in Reading had door stickers giving company names.

93% (87% 2023) said you could only hail a hackney carriage. Just one person thought you could hail private hire. In 2023, 10% thought you could hail both and 3% that you could only hail a private hire vehicle. This could partly arise from the increase in app usage.

5 Key stakeholder consultation

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

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

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

The list contacted includes those suggested by the Council, those drawn from previous similar surveys, and from general internet trawls for information. Our target stakeholders are as far as possible drawn from across the entire licensing area to ensure the review covers the full area and not just specific parts or areas. However, with the reticence of people to speak by phone, the main emphasis was on emailing people with a standard set of questions.

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.

It must be noted that this element of the investigation is not statutory, and we have no power, nor does the licensing authority, to require response. Since the pandemic, response has been very small in most cases. For Reading, although 34 invitations were issued, there were four (just one 2023) responses.

There was one hospitality, one club/bar, one restaurant and one local authority respondent. 75% said their customers, staff or those they represented used local taxis. Half said they would get them from a rank, a quarter using their own mobile phones, and a quarter using a mix. Half were aware of ranks, a quarter said they expected people would use the nearest rank, with the other person saying they were not aware of ranks.

The lack of response may well represent satisfaction from those contacted and at least they have been given opportunity to provide feedback.

Two of the four said they had received complaints. One said “drivers are not allowed to refuse jobs and have done so on multiple occasions when collecting patrons from Playlist Live and Black Diamond venues”. The other said “since a letter has been sent from Licensing, drivers have been very helpful, although they might just be the helpful ones in any event”.

Between February 2024 and July 2025, the licensing section was sent eight written complaints about taxi availability. Two of these mentioned shortages of hackney carriages at the station in evenings. Another said they had used local taxis for 13 years but also found a lack of vehicles at the station. A user of 15 years said a general shortage of hackney carriages existed at ranks but did not specify where or when.

A student said they often could not get taxis to and from their university lectures. Another told of issues at the station but also quoted apps telling him waiting times of an hour or more (which may or may not relate to hackney carriages). Another quoted reducing service quality for the hackney carriage service.

The final complaint related to them feeling that the private hire vehicles they preferred to use to transfer from their wheelchair to a seat was not allowed near to the station front. They felt that hackney carriages did not provide a better option as often they were told their chair was too big, or the vehicle did not have ramps, or they were not properly restrained if they did end up travelling in their chair.

All these need to be noted although some are not necessarily fully an issue with the hackney carriage service per se. Further comment is made in the synthesis section.

6 Trade stakeholder views

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

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

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

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

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

For this survey, we discussed issues with the key trade representatives at inception, but no all-trade survey was undertaken as the overall view from the hackney carriage trade was strong support both for the survey to be undertaken and for the limit to be retained.

The Council undertook their own survey of drivers. The questions in summary were:

- If the person regularly drove a Reading licensed hackney carriage
- If the person currently owned or part owned a Reading licensed hackney carriage vehicle
- If they currently rented a hcv
- If owned, if they purchased from a previous owner, applied for a new plate, or some other ownership route
- If they believe there is currently an oversupply of taxis licensed in Reading

- what of the following options they would prefer to see adopted:
  1: retain limit on numbers for at least next three years
  2: grant extra licences but limited in any 12 month period such as one per month or 12 per year
  3: issue unlimited number of licences to any who request

Option for further comment was also provided.

This received 37 (52 in 2023) responses, a 10% (14% 2023) response rate. All quoted vehicles were validated against the current list of Reading hackney carriages. Of these, 63% (46% 2023) said they were owner-drivers and 35% (54% 2023) rented.

All those that owned answered the next question with 86% (79% 2023) having purchased from a previous owner, 14% (17% 2023) having obtained a plate with a re-issue of plates and none (4% 2023) saying they owned the vehicle but not the plate.

All but one of those owning their plate told us when they had bought it. One each (6% of the total) had bought in 2002, 2007, 2014, 2015, 2022 and 2023. Two each (11%) had bought in 2008, 2018 and 2024 and four (22%) had bought in 2025. Two, 11% said their vehicles were new when bought. Three (17%) said ten years old, two each (11% each) said five, six, eight or 12 years old, and one each said 4, 9 13, 15 or 16 years. Totalling these, 28% were five years or younger, 28% six to nine years, and 44% between 10 and 16 years old on purchase.

Of the owner-drivers, 86% (88%) said there was an oversupply of vehicles; for those saying they rented, 50% (94%) said there was an oversupply, with in this latter case a third saying there was no oversupply and the remainder not saying.

In terms of options moving forward, all those responding gave an answer. 76% (44% 2023) said no more plates for at least the next three years; 24% (56% 2023) said a restricted number should be issued.

When split by owners and renters, unsurprisingly, 86% (92% 2023) of owners said the limit should be retained, with two others not responding (in 2023 two said add one plate per month, now one person said two per year). For renters, 42% (93% 2023) said add more plates with the balance saying retain the limit, apart from one who did not answer this question. Of those saying more plates, 29% said nine per year, with the remainder (14% each) saying two, three, five to ten, 10 or 12 per year. In 2023, 75% said add one a month, with one renter each saying add two per month, add ten per month, add five a year, add 15-20 a year and finally add 12-24 immediately then one per month for five years.

No respondent suggested complete removal of the limit, as in 2023.

19, a mix of both owners and renters, provided further comments. Six of these mentioned the impact on their work of non-Reading licensed vehicles that operated using apps. Several said more ranks were needed, and more so were any extra plates to be issued. Many of those renting said they found it hard to keep a particular vehicle consistently. One current owner made a clear statement of support for issuing more licences, but said this should be a steady and controlled increase. Others renting supported an increase but several renters also said there was no space at the ranks for more.

7 Evaluation of unmet demand and its significance

It is first important to define our specific view about what constitutes unmet demand. Our definition is when a person turns up at a hackney carriage rank and finds there is no vehicle there available for immediate hire. This normally leads to a queue of people building up, some of who may walk off (taken to be latent demand), whilst others will wait till a vehicle collects them. Later passengers may well arrive when there are vehicles there, but because of the queue will not obtain a vehicle immediately.

There are other instances where queues of passengers can be observed at hackney carriage ranks. This can occur when the level of demand is such that it takes longer for vehicles to move up to waiting passengers than passengers can board and move away. This often occurs at railway stations but can also occur at other ranks where high levels of passenger arrivals occur. We do not consider this is unmet demand, but geometric delay and although we note this, it is not counted towards unmet demand being significant.

The industry standard index of the significance of unmet demand (ISUD) was initiated at the time of the introduction of section 16 of the 1985 Transport Act as a numeric and consistent way of evaluating unmet demand and its significance. The ISUD methodology was initially developed by a university and then adopted by one of the leading consultant groups undertaking the surveys made necessary to enable authorities to retain their limit on hackney carriage vehicle numbers. The index has been developed and deepened over time to take into account various court challenges. It has now become accepted as the industry standard test of if identified unmet demand is significant.

The index is a statistical guide derived to evaluate if observed unmet demand is in fact significant. However, its basis is that early tests using first principles identified based on a moderate sample suggested that the level of index of 80 was the cut-off above which the index was in fact significant, and that unmet demand therefore was such that action was needed in terms of additional issue of plates to reduce the demand below this level, or a complete change of policy if it was felt appropriate. This level has been accepted as part of the industry standard. However, the index is not a strict determinant and care is needed in providing the input samples as well as interpreting the result provided. However, the index has various components which can also be used to understand what is happening in the rank-based and overall licensed vehicle market.

ISUD draws from several different parts of the study data. Each separate component of the index is designed to capture a part of the operation of the demand for hackney carriages and reflect this numerically. Whilst the principal inputs are from the rank surveys, the measure of latent demand comes from the public on-street surveys, and any final decision about if identified unmet demand is significant, or in fact about the value of continuing the current policy of restricting vehicle numbers, must be taken fully in the context of a careful balance of all the evidence gathered during the survey process.

The present ISUD calculation has two components which both could be zero. In the case that either are zero, the overall index result is zero, which means they clearly demonstrate there is no unmet demand which is significant, even if other values are high.

The first component which can be zero is the proportion of daytime hours where people are observed to have to wait for a hackney carriage to arrive. The level of wait used is ANY average wait at all within any hour. The industry definition of these hours varies, the main index user counts from 10:00 to 18:00 (i.e. eight hours ending at 17:59). The present index is clear that unmet demand cannot be significant if there are no such hours. The only rider on this component is that the sample of hours collected must include a fair element of such hours, and that if the value is non-zero, review of the potential effect of a wider sample needs to be considered.

The other component which could be zero is the test identifying the proportion of passengers which are travelling in any hour when the average passenger wait in that hour is greater than one minute.

If both of these components are non-zero, then the remaining components of the index come into play. These are the peakiness factor, the seasonality factor, average passenger delay, and the latent demand factor.

Average passenger delay is the total amount of time waited by all passengers in the sample, divided by the total number of passengers observed who entered hackney carriages.

The seasonality factor allows for the undertaking of rank survey work in periods which are not typical, although guidance is that such periods should normally be avoided, if possible, particularly as the impact of seasons may not just be on the level of passenger demand but may also impact on the level of supply. This is particularly true in regard to if surveys are undertaken when schools are active or not.

Periods when schools are not active can lead to more hackney carriage vehicles being available whilst they are not required for school contract work. Such periods can also reduce hackney carriage demand with people away on holiday from the area. Generally, use of hackney carriages is higher in December in the run-up to Christmas, but much lower in January, February and the parts of July and August when more people are likely to be on holiday. The factor tends to range from 0.8 for December (factoring high demand level impacts down) to 1.2 for January / February (inflating the values from low demand levels upwards).

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

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

The latent demand factor was added following a court case. It comes from asking people in the on-street questionnaires if they have ever given up waiting for a hackney carriage at a rank in any part of the area. This factor generally only affects the level of the index as it only ranges from 1.0 (no-one has given up) to 2.0 (everyone says they have). It is also important to check that people are quoting legitimate hackney carriage rank waits as some, despite careful questioning, quote giving up waiting at home, which must be for a private hire vehicle (even if in hackney carriage guise as there are few private homes with taxi ranks outside).

The ISUD index is the result of multiplying each of the components together and benchmarking this against the cut-off value of 80. Changes in the individual components of the index can also be illustrative. For example, the growth of daytime hour queueing can be an earlier sign of unmet demand developing than might be apparent from the proportion of people experiencing a queue particularly as the former element is based on any wait and not just that averaging over a minute. The change to a peaky demand profile can tend towards reducing the potential for unmet demand to be significant.

Finally, any ISUD value must be interpreted in the light of the sample used to feed it, as well as completely in the context of all other information gathered. Generally, the guide of the index will tend not to be overturned in regard to significant unmet demand being identified, but this cannot be assumed to be the case – the index is a guide and a part of the evidence and needs to be taken fully in context.

The Table below provides the results for each element of the ISUD equation for all surveys for which this is available.

Element	2025	2023	2018	2015	2012	2009	2002	1997
Average wait (mins)	0.08	0.35	0.3	0.19			1.27	1.42
Peak factor	0.5	0.5	0.5	0.5	0.5		1	1
% Queues in weekday daytime hours	22.46	24.03	6.45	19.4	0		6.98	0
% pass in hours with waiting over 1 min	2.11	11.25	3.32	3.8	3.6		32.91	26
Latent demand	1.056	1.037	1.03	1.03	1.09	n/k	n/k	n/k
Overall index	2.16	45.89	3.31	7.25	0	37	291	0

Average wait time across all ranks and all passengers has reduced significantly to just 0.08 minutes from the 0.35 of 2023. The peak factor remains the same although the peak to average ratio has increased in 2025. Both the proportion of hours with daytime queues and the proportion of passengers travelling in hours when the APD is a minute or more have decreased, but latent demand has increased.

This means that the total index has now reduced significantly from the level in 2023, with the trend seeing the lowest ever ISUD statistic apart from in 1997 when the value was zero.

These results suggest that the current policy limiting vehicle numbers remains of benefit to the public interest. It also shows that the concern regarding the strong worsening in the 2023 survey has now been reversed and it is clear the limit can be retained, and at its present level.

8 Summary, synthesis and study conclusions

This Taxi survey on behalf of Reading has been undertaken following the guidance of the BPG and other recent case history regarding unmet demand and its significance. This Report has drawn together all the evidence gathered to enable the licensing committee to determine if, at this present time, there is any evidence that observed unmet demand is significant according to the requirements of Section 16 of the 1985 Transport Act, and on that basis if, and at what level, the current limit on hackney carriage vehicle numbers can continue. This chapter summarises the key points from each chapter, draws a synthesis and conclusions together and make recommendations regarding the way forward. However, it must be reiterated that it is the Committee alone who need to be satisfied that their decision is robust and would stand up if scrutinized in Court.

Background and context

The current limit on hackney carriage vehicle numbers in the Reading Borough Council licensing area was put in place following a survey in 2009, before which there were two years when there was no quantity restriction in place. Since that time, the authority has undertaken regular reviews using a survey at the BPG former recommended interval of no more than three years.

The authority undertook regular three-yearly reviews in 2012, 2015 and 2018, and planned a repeat in 2022. This was delayed by the pandemic until 2023, with that survey finding that the ISUD index had seen strong increase meaning a fresh 2025 survey was recommended to ensure that the trend towards unmet demand that had been identified had not continued, which this Report now provides.

Our March 2025 proposal was accepted in June with inception in mid-July 2025. On-street interviews were in July with rank work in early October 2025 once students had returned.

Local Transport Policy continues to include taxi and private hire vehicles as an explicit key element of the overall mobility services and public transport of the area.

The pandemic hit private hire vehicle numbers much harder than hackney carriage although some hackney carriage plates became available but were promptly taken up increasing the level of EV style vehicles in the fleet. The fully WAV hackney carriage fleet means that levels of WAV in the private hire element are very small, but private hire operators liaise with hackney carriages in order to ensure customer needs are met, a very good practice.

The current national issue of out-of-town plates being active has long been part of the operation in Reading given the large hinterland of the town. Fareham, New Forest, West Berkshire, Bracknell, Windsor and Maidenhead, Wokingham, South Oxfordshire and Transport for London vehicles are all regularly observed. Some of these may seek custom from local trips.

Rank observations

A very similar level of rank observations were undertaken as in the previous survey, with no significant changes to rank provision and the building work impacting on use of Garrard Street completed. In 2025 just under 33,000 different events at ranks were recorded of which 70% were vehicle arrivals and departures. Of these 90% were hackney carriage movements and 9% private cars. Just over 2% of arriving passengers were noted leaving the ranks on foot, a very low level of walk-aways.

When analysis was undertaken it was found that the level of active rank hours in 2025 was reduced from the 750 of 2023 to 688, mainly with reduced activity at Station Road and at the main hospital rank, but also at other locations.

Disability access saw seven people in wheelchairs and a further 74 notably disabled persons assisted into vehicles in 2025. The largest number of wheelchair passengers was five at the Horseshoe, alongside 11 otherwise disabled persons assisted. Friar Street West saw the largest volume of these – some 33 persons.

The estimated weekly total passenger demand from ranks in Reading in 2025 is some 3% (11% in 2023 and 14% in 2018) lower than that observed in the previous surveys. In line with another recent survey, station rank patronage has reduced whilst non-station patronage actually increased by 49% since 2023. The total station flows are now the same 64% of the total as in 2018.

The most notable increase was observed at the Quicksilver rank which increased share from 4% to 14%, whilst the Pitcher and Piano rank increased from 5% to 9% and Headmasters from 3% to 4%. Flows at Station Road and the main hospital rank both decreased. Total rank work only provides an average of ten paid fares per day per vehicle.

Comparison of the total flow profiles for the last three surveys are remarkably similar. 2018 and 2025 are more similar in the two weekend overnight flow profiles than either are to 2023. However, Thursday flows in 2025 are generally all lower than both previous surveys apart from the overnight peak Thursday to Friday being highest in 2025.

The 2025 peak to average ratio is highest of the three surveys and much closer to 2018 than 2023. The Quicksilver rank has gained three peaks in the early hours of each day as has Gun Street.

The level of passengers travelling in hours with no delay has increased from 85% to 89% with a strong reduction in average passenger delays of a minute or more (5% 2023 to 2% in 2025). The worst average passenger delay fell from just under 7 to 4.5 minutes.

Wait times at the Horseshoe rank of vehicles for passengers have increased marginally in both morning and afternoon periods.

Reading station rail passenger flows were still only 84% of their previous peak in 2017. 10% of all arriving passengers leave the station from one of the three ranks there. In 2023 this had been 40%.

More of the total hackney carriage fleet were seen on Thursdays and Fridays than in 2023. (64% compared to 58% Thursday and 22% compared to 16% Thursday. However, over the full three days 75% of the fleet was seen compared to 90% in 2023.

On street public views

A reasonable sample of the population in the streets of central Reading were interviewed. The sample saw more females and more of the two older age groups interviewed this time for both sex and age groups. 90% (87% 2023 and 73% 2018) were from the area.

A lower level, 60% (71% 2023, 30% 2018, 24% 2015, 52% 2012 and 55% 2009), said they had used a local licensed vehicle in the last three months, although this value was still higher than levels quoted 2018 and before. 23% (36% 2023) said they used hackney carriage only, 22% (17% 2023) private hire only and 16% (18% 2023) by both types of vehicle – suggesting an increased usage of private hire by this set of respondents.

The estimate of licensed vehicle trips per person per month was 1.2 (0.9 2023, 1.1 2018 and 0.9 2015) for all licensed vehicles and 1.0 (0.84 2023 and 0.4 2018) for hackney carriages. This implies 82% (90% 2023, 33% 2018) of trips were made by hackney carriage – a very high level compared to other surveys, but reduced consistent to the reduced quoted usage of hackney carriage.

The number saying they could not remember when they last used a hackney carriage remained at 4% (having risen from zero in 2018 to 4% in 2023) whilst the level not remembering when they last used one went up to 36% (16% 2023 and none in 2018). These figures also are consistent with a trend away from use of hackney carriages.

36% (38% 2023 and 44% 2018) of those responding said they got licensed vehicles from a rank, 5% (18% 2023, 9% 2018) hailed, 17% (12% 2023, 10% 2018) used an app and 28% (32% 2023 and 33% 2018) telephoned. The split to hackney carriage is therefore 41% (56% 2023 and 53% 2018) with the main gain being 14% now saying 'freephone' compared to none in 2023.

Comparing the level of vehicles in the fleet to the quoted usage of hackney carriage methods and to the stated share from frequencies shows 23% of the fleet are hackneys, 41% saying they got licensed vehicles by hail or rank and 82% share for hackney carriages from the frequency estimates . Values in 2023 were 24%, 56% and 90%, which again suggests reduced usage in 2025.

With respect to companies used if phoned for, response numbers were reduced compared to 2023, but still higher than 2018 and 2015 (81, 201, 58 and 20). However, the same number of companies were named in 2025 as in 2023. Further, the top two companies now took 79% of mentions compared to 50% 2023, 36% 2018 and 30% 2015), showing strong agglomeration of private hire in the area. However, this masked a swop round, with the top company of 2023 no longer mentioned, the second company in 2023 now top, the fourth company in 2023 now second and the third company the same but with an increased share, albeit from 2% to 6%.

In 2025, three apps were quoted with an international one top, an out-of town one second and a hackney carriage app closely behind the second app in terms of share (54%, 24% and 21%). None of the apps were mentioned in the 'phoned for' companies. The previous dominance of the app that included hackney carriages in 2023 (47%) and that of the other (39%) were now reduced by the increase in the international app.

In terms of rank usage, top was Station Hill with 60% (9% 2023) of mentions, then 'Station Road' (13%) although this is most likely the Horseshoe rank, although 1% specifically named the Horseshoe. Adding all station ranks shows similar shares now to 2023 (65% now, 64% 2023, 83% 2018 and 66% 2015). Friar St Quicksilver was third with 10% (increased from 8% in 2023). All other rank citations were reduced in 2025 compared to 2023.

2025 saw a higher level of confirmed usage of ranks compared to 2023, with many more total mentions now (183 compared to 70).

Views of the service provided improved from 2023, with very good now always the highest proportion, compared to most aspects being poor then. The highest score was for driver knowledge.

The dominant matter that would increase usage of hackney carriages remained if they were more affordable. This dominated responses. Few said more hackney carriages at ranks (3%).

In terms of need of wheel chair accessible vehicles, the proportion needing such a vehicles was higher at 22% (18% 2023 and 29% 2018), but retaining all requiring fully wheel chair accessible styles, supporting the current Reading policy focussing on such vehicles.

Latent demand was again increased to 5.6% (3.7% 2023 and 3% 2018).

91% (59% 2023 and 60% 2018) felt there were enough hackney carriages in Reading – a strong increase.

78% (82% 2023) felt they knew the difference between local hackney carriages and private hire vehicles. The main concern for 2025 was that 90% felt hackney carriage had a door sticker, which is incorrect. The two concerns from 2023 had now improved (people thinking you could hail private hire or that both types of vehicle had roof signs).

Key stakeholder views

As is sadly the case since the pandemic, despite strong attempts there were just four key stakeholder responses (but increased from the one of 2023). Two had received complaints, one regarding multiple refusals of jobs from near their venues, and the other saying there had been ain improvement in driver helpfulness following a letter sent out by licensing in response to their complaint.

Trade views

As is custom for this survey, an initial discussion was held with hackney carriage driver representatives who supported the survey and retention of the limit.

The council survey of all hackney carriage drivers saw a lower response (10% now compared to 14% in 2023) , but a higher level of response from those owning vehicles in this survey (63% compared to 46% in 2023).

Both felt there was an oversupply of vehicles, but with owner drivers seeing 86% (88% 2023) say this, whilst only 50% of renters agreed (94% 2023). 76% (44% 2023) said no more plates should be issued with 24% (56%) suggesting a limited issue was needed. However, 86% (92%) of owners said retain the limit whilst 42% (93% 2023) of renters wanted more plates added. None suggested complete removal of the limit as in 2023.

Six mentioned the impact of non-Reading licensed vehicles using apps on their level of business.

Formal evaluation of significance of unmet demand

Average wait time has reduced significantly from 0.35 to 0.08 seconds for this survey. The proportion of passengers travelling in hours with waiting over a minute has strongly reduced whilst the percentage travelling in weekday daytime hours with any waiting has reduced, but only by a small amount. Latent demand has increased. The overall index has reduced from 45.89 in 2023 to 2.16 now, giving this survey the lowest non-zero ISUD value of all surveys undertaken (the surveys of 1997 and 2012 both saw zero ISUD values).

These values suggest the limit remains of benefit to public interest and that the fears raised by the strong increase of the index in 2023 are no longer a concern.

Synthesis

Overall estimated weekly usage of hackney carriages from ranks in the Reading licensing area is about 3% down from that recorded in 2023, a much lower level of reduction than between the previous two surveys (11%). However, the station rank patronage has reduced whilst non-station rank patronage has increased 49%, but excluding the Station Road and hospital ranks whose flows both declined also. The level of rail passengers leaving the station by hackney carriage has fallen from 40% to 10%. These figures suggest that app competition is highest near the station, something we also found in another large recent survey.

At an annual level, rank passengers are in the order of 1.13 million (747,000 trips based on the observed occupancy of 1.5). From the stated public attitude figures, hailed hackney carriage passengers are 157,300; phoned-for private hire 881,000, app-based hirings 440,500, and freephone bookings 535,000 giving a total of 3.14 (was 2.73 2023) million licensed vehicle passengers per year in Reading. This confirms the impact of apps has actually increased overall licensed vehicle usage but that hackney carriages (and phoned bookings) have reduced. The public responses confirm this shift in patronage and usage.

The limit on hackney carriage vehicle numbers clearly kept their numbers much more stable through the pandemic than private hire. The fact that several chose to invest in electric vehicles is a relatively unique position around the country suggesting overall demand is generally more buoyant.

The reduction in hackney carriage passengers would be expected to increase service levels although the improvement noted is much greater than can be explained by the relatively small reduction in patronage. The reduced waiting times observed at the station ranks by vehicles would also be linked to the (much larger) reduction in passenger numbers there. Contrary to this are six or seven written complaints about shortage of vehicles at ranks, mainly at the station, although no further complaints have come in since July 2025. At least one comment might relate more to similar issues with the availability of private hire given that they quoted app waiting times of over an hour being shown.

It does appear that the initial benefit of the hackney carriage related app in terms of holding off private hire competition has somehow now been eroded and replaced by a strong increase in private hire based app competition. It is concerning that a non-Reading based app also appears to have continued its appeal.

A strong increase was found in customer satisfaction although that question covered all licensed vehicles not just hackney carriage (mainly due to people generally not being able to distinguish views between the vehicle types). This was however countered by one person writing in to the Council feeling that the service levels for hackney carriages were reducing.

It is accepted that the new BPG encourages review of unmet demand every five years rather than every three years, but there is also encouragement this should be in line with the overall development of transport policy and the Local Transport Plan. The latest LTP is currently under development as the Reading Transport Strategy 2040 with consultation in mid-2023 and already contains some licensed vehicle strategy elements.

Conclusions

It is clear that the limit continues to provide benefit to the public. Nearly all the hackney carriage trade, even those wanting plates they could own themselves, support retention of the limit per se. Although some have concern that the 'protection' of the limit might reduce competition in the current environment this protection is important to prevent further erosion of the hackney carriage operation and provide support to what remains an important contributor to local public transport. The fact that three central area ranks have gained patronage since 2023 is encouraging.

9 Recommendations

On the basis of the evidence gathered in this Taxi survey for Reading, our key conclusion is that there is no evidence of any unmet demand for the services of hackney carriages either patent or latent which is significant at this point in time in the Reading licensing area. The committee is therefore able to retain the present policy of limiting vehicle licences, and at the same level of vehicle numbers, and defend this if necessary.

The limit has clearly benefitted the public and trade and is well supported by all the hackney carriage trade. There is no evidence to support removal of the limit policy as it is supported widely and is presently providing benefit to the travelling public. The small number of representations of shortages are noted but have to be seen in the wider context of much larger numbers reporting improved satisfaction. Further opportunity to complain must continue to be provided and marketed, but also dealt with, if possible, with further contact.

The limit can be reviewed as long as repeated within a maximum of five years as per the latest BPG, unless legislation (particularly local government reorganisation or the transfer of licensing to the larger local transport authority level) revises the background. Consideration of a Reading zone within any larger area is, however, strongly worthwhile given the evidence the current limit benefits the public.