

## 1 About the survey

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We regularly survey Sydney, Other Urban and country residents about their use (and non-use) of taxis and other forms of point-to-point transport, and the findings inform our reviews of taxi fares and licences. In response to changes in the market for point-to-point transport, we have expanded our survey questions to gain additional information on services such as ride sharing, car sharing, community and courtesy transport<sup>1</sup>.

We commissioned Taverner Research to undertake the survey. The survey was conducted online in November 2016. Over 2,750 people were surveyed:

- ▼ 2,021 in Urban Sydney
- ▼ 504 in Other Urban areas (Newcastle, Wollongong, Gosford, Wyong)
- ▼ 251 in Country towns with 20 or more taxi licences.

Taverner's report on the survey is on our [website](#). A copy of the survey questionnaire is included in Taverner's report.

This information paper summarises the findings of the survey.

## 2 Key findings

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Demand for point-to-point transport in Sydney grew in 2016. While demand for taxis was relatively stable, there was increased use of other modes of point-to-point transport, particularly ride sharing.

The Taverner survey found that the number of people who used taxis and the frequency of taxi use was consistent with previous years. The survey also found that passengers' experiences and views on waiting times, fares and value for money were similar to the results from our 2012 to 2015 surveys.

However there was an increase in the use of alternative forms of point-to-point transport. In Urban Sydney:

- ▼ 33% of adults had used a ride sharing service in the previous six months compared with 19% in 2015 and 11% in 2014
- ▼ 24% of adults had used a hire car in the previous six months compared with 21% in 2015 and 18% in 2014, and
- ▼ 22% of adults had used car sharing in the previous six months compared with 17% in 2015 and 13% in 2014.

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<sup>1</sup> Ride sharing was legalised in December 2015 <http://www.rms.nsw.gov.au/about/news-events/news/ministerial/2015/151217-ride-sharing.html>

### 3 Taxi use

#### Taxi use was similar to previous years

Taxi use was significantly more common in Urban Sydney than in other areas served by taxis, and more frequent use was more common in Urban Sydney than in the other locations:

- ▼ 60% of Urban Sydney adults had used a taxi in the previous six months compared with 44% of adults in Other Urban areas and 41% of adults in Country towns.
- ▼ 16% of adults in Urban Sydney had used a taxi at least once a week, compared with 6% in Other Urban areas and 12% in Country towns.
- ▼ 25% of adults in Urban Sydney had used a taxi less than once a month, compared with 23% in Other Urban areas and 18% in Country towns.

These results are similar to those reported between 2012 and 2015.

#### Perceived changes in taxi use

Urban Sydney adults were more likely to say they had used taxis *less* (24%) than more (15%). This pattern of response has been largely consistent across all survey years. There was little movement in perceived changes in taxi use in Other Urban and Country towns.

#### Most recent taxi trip

##### Getting a taxi

On their last taxi trip, the bulk of taxi users employed one of the traditional methods of obtaining a taxi – hailing in the street, catching a taxi at a rank, or phoning the taxi company.

##### Waiting times

The method of obtaining a taxi had the biggest effect on waiting time, with booking the next taxi available resulting in the longest wait times. In each survey from 2012 to 2016, waiting less than five minutes was much more likely if boarding at a rank (52% to 58%) or hailing a passing taxi (41% to 46%) than if booking the next available taxi (7% to 12%).

Waiting times were higher on Friday and Saturday nights than at other times.

##### Being unable to get a taxi

All taxi users were asked whether they had been able to obtain a taxi the last time they tried, and if not, why.

The reasons given for being unable to obtain a taxi were:

- ▼ a booked taxi did not turn up (9% in Urban Sydney, 9% in Other Urban and 2% in Country towns)
- ▼ being unable to find a taxi when trying to hail one from the street (7% in Urban Sydney, 1% in Other Urban and 5% in Country towns), and
- ▼ not being able to find one at a taxi rank (7% in Urban Sydney, 6% in Other Urban and 3% in Country towns).

The overall results are similar to those obtained in previous years.

### **Fare paid**

The median taxi fare in Urban Sydney was \$28 (it was just under \$30 in 2015 and 2014). In Other Urban locations the median fare was less than \$20 and in Country towns it was between \$10 and \$20.

## **Taxi passenger experiences**

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### **Views on fare levels and value for money**

Most respondents did not consider taxi trips offered good value for money overall or for any of a range of different trip scenarios.

The survey found:

- ▼ 28% of taxi users considered taxis generally offered good value for money (20% in 2015), and
- ▼ cheaper fares would be the main motivation to increase taxi use among taxi users (50%) and non-users (25%).

### **Problems experienced with taxi use**

In 2016, 37% of Urban Sydney taxi users reported having had one or more problems either during a taxi journey or when trying to use a taxi in the last 12 months (26% of Other Urban users and 27% of Country taxi users). These are similar to the results in 2014 and 2015.

The most commonly reported problems were, in order of how frequently they were reported:

- ▼ not being able to get a taxi when one was wanted
- ▼ drivers not taking the most direct route
- ▼ drivers not knowing where they were going, and
- ▼ being overcharged.

## **4 Ride share use**

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### **Ride share use increased**

Use of ride share (such as UberX, GoCar, GoBuggy) increased in Urban Sydney and Other Urban areas. In the past six months:

- ▼ 33% of Urban Sydney adults had used ride share, up from 19% in 2015 and 11% in 2014
- ▼ 32% of Urban Sydney ride share users had used ride share at least once per week
- ▼ 18% of adults in Other Urban areas had used ride share, up from 9% in 2015 and 4% in 2014, and
- ▼ 7% of adults in Country towns had used ride share, up from 3% in 2015 and 2014.

### **Perceived changes in ride share use**

Respondents were asked if they used ride share more or less than in the previous year. Most Urban Sydney residents said their use of ride share either *increased* (17%) in the previous 12 months or stayed the same (74%). Less than 10% reported they had used ride share less often.

The most common reason given for having used ride share services more was that they were less expensive (54%).

### **Impact on taxi use**

When ride share users were asked what effect their use of ride share services has had on their use of taxis, 68% said it had stopped or reduced their use of taxis (stopped 12%, reduced a little 29%, reduced a lot 27%).

Despite these reported impacts, the survey found:

- ▼ no reported reduction in the use of taxis overall
- ▼ a high prevalence and frequency of taxi use among those Urban Sydney adults who usually used ride share. Among this group, 94% used a taxi in the last six months, 37% at least once a week, and
- ▼ taxis were used by 92% of all ride share users.

### **Most recent ride share trip**

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#### **Waiting times**

Ride share users were asked if they considered waiting times reasonable at different times of the day and days of the week. Waiting times for obtaining a ride share were significantly more likely to be considered reasonable than waiting times for a taxi. The largest difference was on Friday and Saturday nights when 69% of Urban Sydney ride share users considered the waiting times reasonable compared with 38% of Urban Sydney taxi users.

#### **Fare paid**

The median fare for a ride share trip in Urban Sydney was around \$34, higher than for taxis (around \$28). When trip length is taken into account the survey results show that taxi fares tended to be higher than ride share fares for most distances.

### **Ride share passenger experiences**

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#### **Views on fare levels and value for money**

Among Urban Sydney ride share users:

- ▼ 75% thought ride share offers good value for money (in contrast to 28% of taxi users). When surge pricing is operating this drops to 24%.
- ▼ The lower cost of ride share services was the main reason for its use.
- ▼ More would use ride share if fares were cheaper (21%) or if there were no surge pricing (8%).

### **Problems reported with rideshare use**

About one in four (27%) Urban Sydney adults who had used a ride share service reported they had a problem in the past twelve months when using the service or when trying to use the service. The most commonly reported problems were, in order of how frequently they were reported:

- ▼ not being able to get a ride share service when one was wanted
- ▼ drivers not taking the most direct route
- ▼ drivers not knowing where they were going, and
- ▼ being overcharged.

## **5 Car share and hire car use**

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### **Use of car share and hire car services increased in Sydney**

- ▼ 22% of Urban Sydney adults had used a car share service (such as GoGet or Car Next Door) in the previous six months (up from 17% in 2015 and 13% in 2014) compared with 8% of adults in Other Urban areas (7% in 2015 and 6% in 2014).
- ▼ 24% of Urban Sydney adults had used hire cars in the previous six months (21% in 2015 and 18% in 2014).
- ▼ Hire cars had been used by 15% of adults in Other Urban areas (same as in 2015) and 10% of adults in Country towns (6% in 2015).

## **6 Use of courtesy transport and community buses**

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### **Use of courtesy transport and community transport increased in 2016**

- ▼ 27% of Urban Sydney adults had used community transport (21% in 2015) and 25% had used courtesy transport (21% in 2015).
- ▼ 20% of adults in Other Urban areas had used community transport (19% in 2015) and 24% had used courtesy transport (same as in 2015).
- ▼ 13% of adults in Country towns had used community transport (11% in 2015) and 19% had used courtesy transport (same as in 2015).