Point-to-Point Transport Passenger Survey 2025

Prepared for

IPART Independent Pricing and Regulatory Tribunal | NSW

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Summary | **The 2025 Point-to-Point (P2P) Transport Passenger Survey highlights evolving trends in confidence, satisfaction, and usage of taxi and rideshare services across NSW.**

While **taxis continue to inspire higher confidence** in their ability to pick up and drop off passengers at home, **confidence in rideshare services has grown in Sydney and remained stable outside of Sydney, while confidence in taxis declined in both regions.**

Satisfaction with available services also reflects regional differences. In Sydney, 55% of respondents were at least partially satisfied with taxi services, compared to 63% for rideshare. Outside of Sydney, satisfaction with taxis was slightly lower at 52%, while satisfaction with rideshare was much lower at 40%. These figures represent a decline in satisfaction with taxis compared to 2024, while satisfaction with rideshare is largely stable.

Usage patterns show rideshare services are more commonly used than taxis across Sydney, with 56% of respondents reporting rideshare use in the last six months compared to 41% for taxis. Outside of Sydney, taxi and rideshare usage was on par over the same period.

While rideshare and taxi usage are similar, rideshare is more likely to be the preferred mode both within and outside of Sydney. There is also considerable latent demand for P2P transport, with many respondents indicating they would use taxis and rideshare more often if barriers were removed. Demand was lowest for rank-and-hail taxis, which continue to be less popular than booked taxi services.

Perceptions of service quality have shifted over the last year. Rideshare services are widely perceived to have improved, while taxi services are seen to have declined slightly. Rideshare also were rated higher for value for money and as the preferred mode of transport.

Satisfaction with recent/last trips remains high overall, with rideshare outperforming taxis across key metrics. Among respondents who had taken a trip in the last three months, 82% of rideshare users and 72% of taxi users were at least partially satisfied with their experience. Satisfaction with waiting times was similar for both services (79% for rideshare vs 74% for taxis), but satisfaction with fares was notably higher for rideshare (67%) compared to taxis (54%). Regional differences were evident, with satisfaction with taxi fares outside of Sydney far lower than rideshare fares.

The findings reflect the ongoing shift in consumer preferences towards rideshare services, particularly in Sydney, while highlighting the challenges taxis face in maintaining satisfaction and usage levels. But while rideshare continues to grow in popularity, there has been an overall decline in preferences for using both taxi and rideshare services compared to previous years. This decline may reflect increased reliance on alternative transport modes, economic pressures, or changing travel behaviours and expectations, and is suggestive of a potential slight decline in total demand for P2P services.

Source of data

The new IPART P2P Passenger Survey was introduced in 2024. The simplified survey is conducted across four zones within Sydney and five regions across the rest of the state.

Results are aggregated at an overall state level and at the level of Sydney and non-Sydney, as well as each of the nine geographic regions. The survey measures satisfaction and use of services, and has been designed to monitor the ability of the now largely deregulated P2P industry (primarily taxis and rideshare) to meet the needs of the NSW community. A Core Module is asked of all respondents, and then a Last Trip Module is asked only of respondents with a recent trip.

A total of 2,715 people responded to the survey from June to October 2025, with 1,096 providing feedback on a recent trip (within the last 3 months).

Technical Details

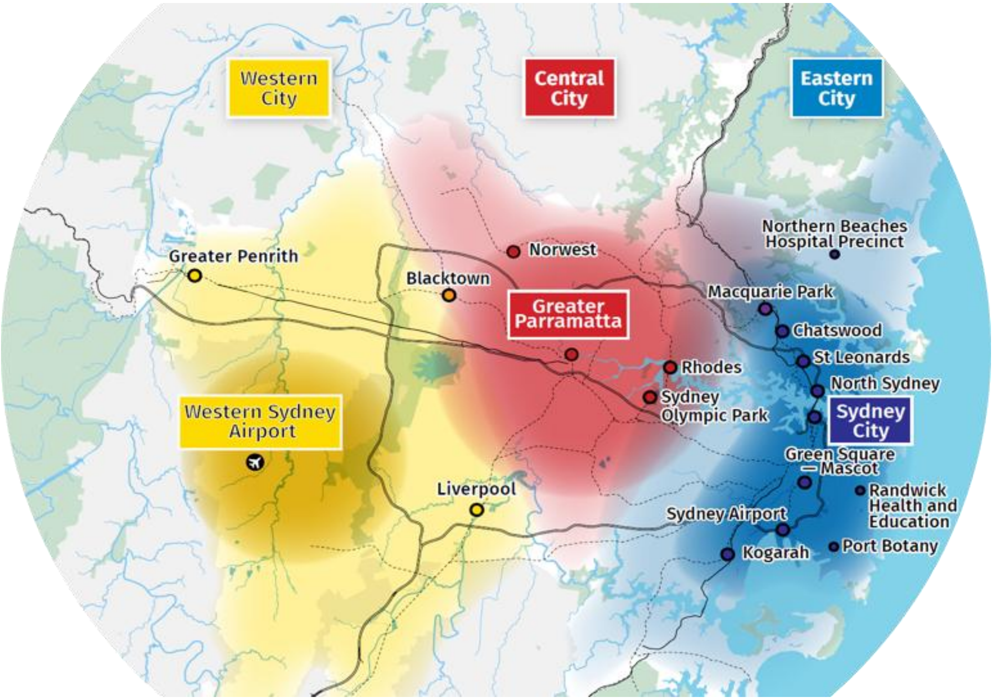
The P2P transport survey is conducted online with NSW residents. It consists of a Core Module (5 minutes average duration) that measures perceptions of available taxi and rideshare services, as well as usage and preferences. For respondents who have recently used P2P transport, a ‘Last Trip’ module (4 minutes average) assesses their methods of obtaining the vehicle and their satisfaction with the trip experience.

The 2025 survey was conducted between 2 June and 29 October, with an approximately consistent rate of completions per week. Filtering into the last trip module was managed to achieve approximately 1,000 completions.

A total of 2,715 surveys were completed across 9 regions aligning with the *Metropolis of Three Cities*[1] Greater Sydney region plan, with 1,096 last trips reported on.

P2P Passenger Survey *2025 sample sizes*	Core Module				Last Trip Module		
	Targets	Male	Female	Total	Taxi	Rideshare	Total
Sydney Metro	*1,400*	708	746	**1,457**	314	281	597
Central River City	*350*	173	182	**355**	75	54	129
Eastern Harbour City (North)	*350*	173	186	**359**	74	80	154
Eastern Harbour City (South)	*350*	185	186	**371**	105	92	197
Western Parkland City	*350*	177	192	**372**	60	55	117
Non-Sydney	*1,100*	608	646	**1,258**	280	218	499
Illawarra-Shoalhaven City	*150*	90	104	**194**	40	39	79
Central Coast (NSW)	*150*	91	85	**177**	38	23	61
Lower Hunter & Greater Newcastle	*350*	181	193	**376**	100	68	169
Regional Towns w population 30K+	*300*	166	165	**331**	73	64	137
Rest of NSW	*150*	80	99	**180**	29	24	53
Total	*2,500*	1,316	1,392	**2,715**	594	499	1,096

Interlocking age x gender quotas within each of the nine locations were used to manage the overall sample.
Final results reported here are weighted at the Sydney / non-Sydney level, and at the overall state level.



[1] https://www.planning.nsw.gov.au/plans-for-your-area/a-metropolis-of-three-cities

Survey History

NSW Independent Pricing and Regulatory Tribunal (IPART) has conducted regular surveys of users of point-to-point (P2P) transport in NSW since 2012.

In 2017 a significant redesign of the survey was undertaken. The new survey retained an online format, but updated the content to measure awareness, use and satisfaction in somewhat different ways. More substantively, the survey equalised the treatment of taxis and the then-emerging rideshare industry.

As the P2P industry has become largely deregulated in NSW, the P2P survey was again significantly updated in 2024. The new survey focusses on broad satisfaction with available services across geographic regions, while retaining an in-vehicle satisfaction component.

The new questions were specifically designed to allow retrospective benchmarks to be derived from historical data for some key metrics.

The next version of this report will be updated to a tracking format, with three years of data from 2024-2026 shown.

Section 1: Core Service Perceptions and Usage

SERVICE CONFIDENCE

Including areas without coverage

See note below

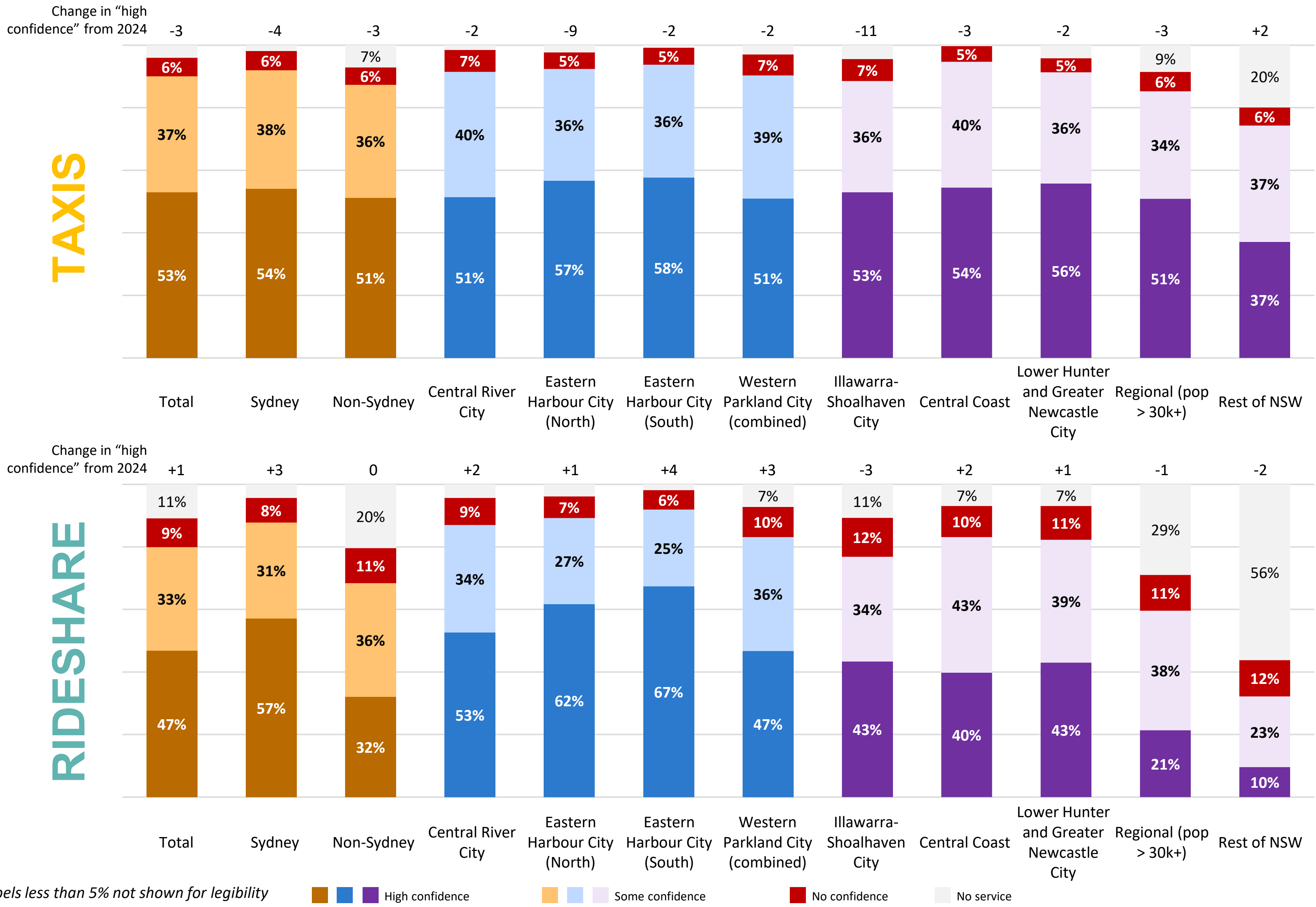
When areas without coverage are included, confidence that **taxis** would pick people up from home and get them back home has decreased, while confidence in **rideshare** has, if anything, increased fractionally.

There are clear regional differences; although overall people have greater confidence in **taxi** services, this is more so the case outside of Sydney. Within Sydney, all regions except for Western Parkland City showed greater confidence in **rideshare** services.

This page and the next page show data from the same questions, however this slide ***includes*** *responses where people have indicated they have "no service" coverage.*

Service Confidence Index

Average confidence each service would "successfully pick you up from your home" and "get you back home (or near enough) from somewhere else"



SERVICE CONFIDENCE

Excluding areas without coverage

See note below

Compared to the previous slide, less variability in confidence levels across regions is revealed **when areas without service coverage are excluded**.

Taxi confidence becomes much more uniform, with Sydney, non-Sydney, and the Total all converging to 55% high confidence.

Similarly, **rideshare** confidence in Non-Sydney locations increases substantially once service gaps are removed, rising from 32% to 40%.

*This page and the previous page show data from the same questions, however this slide **excludes** responses where people have indicated they have "no service" coverage.*

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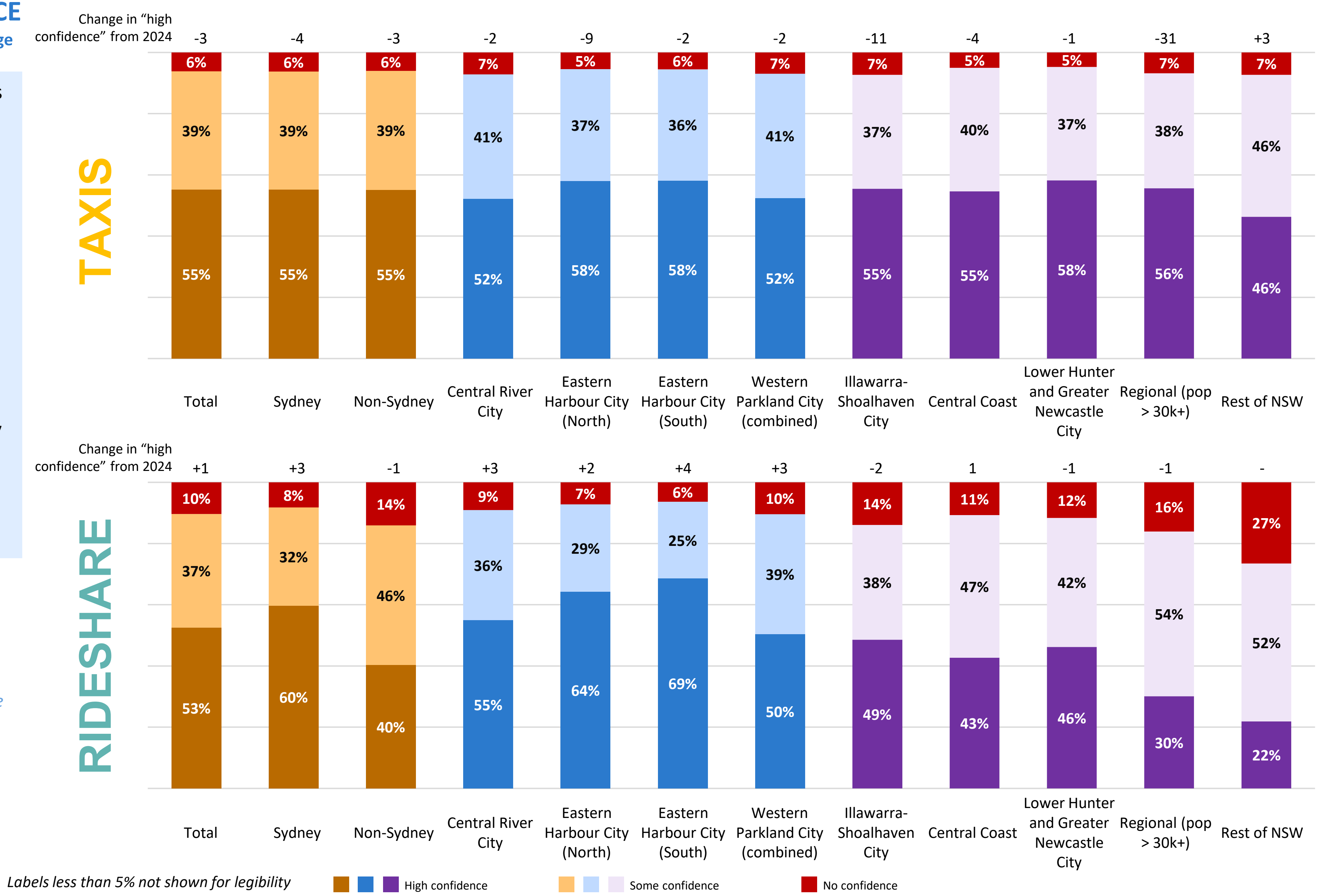
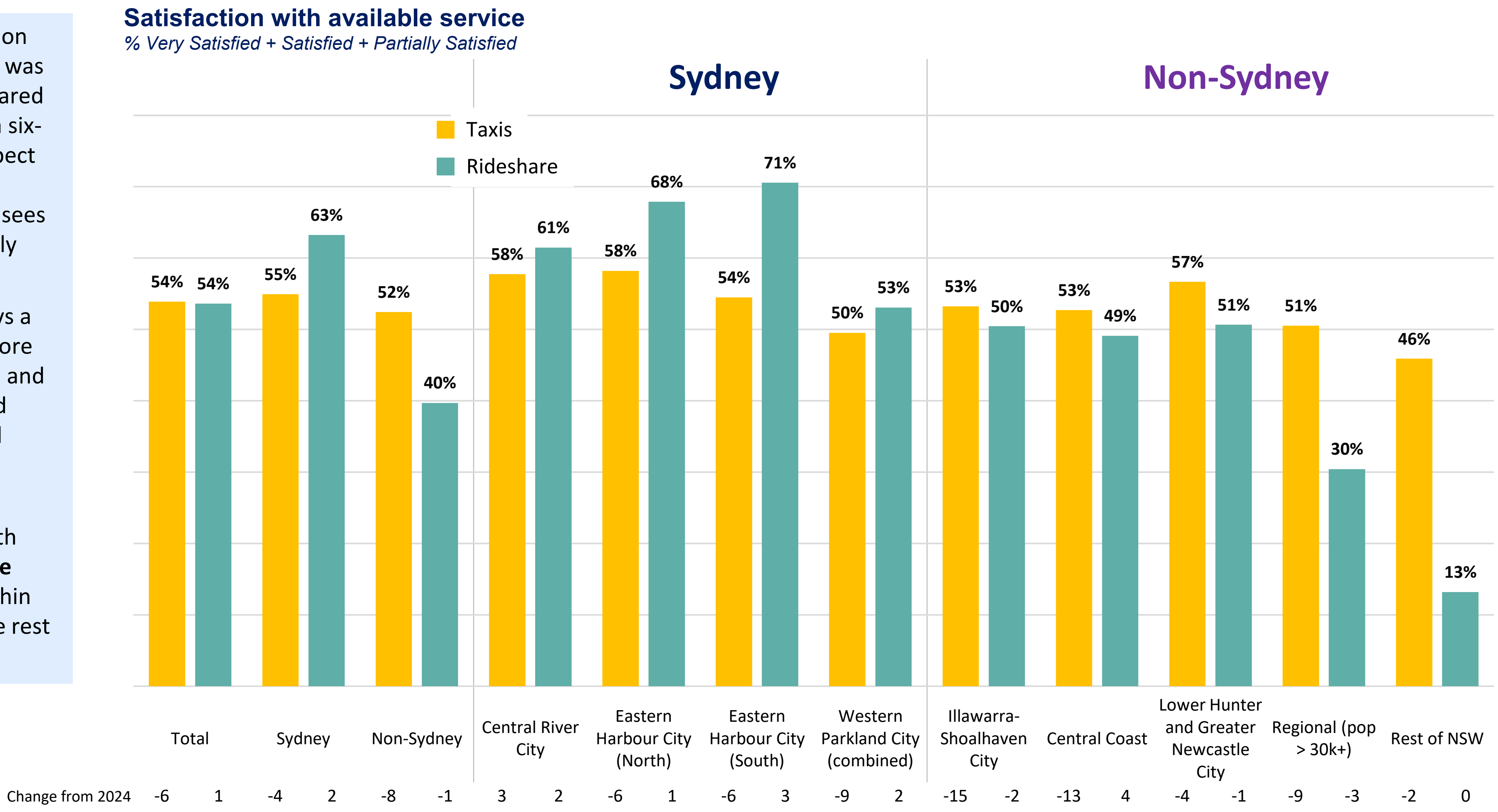


SATISFACTION WITH AVAILABLE SERVICE

While overall satisfaction with available services was greater for **taxis** compared to **rideshare** in 2024, a six-point decline with respect to **taxis**, and a 1-point increase for **rideshare** sees the two services equally rated in 2025.

Regionality clearly plays a role, with **rideshare** more highly rated in Sydney, and **taxis** more highly rated outside of Sydney, and particularly in more regional locations.

Overall satisfaction with both **taxi** and **rideshare** services are higher within Sydney than across the rest of the state.



USAGE

While similar proportions of people in Sydney have accessed **taxis** via booking and rank and hail in the last month, people were more likely to have done so via a booking over the last 6 months. Accessing **taxis** via a booking was also much more common than rank and hail outside of Sydney. **Rideshare** is far more common within Sydney, both over the last month and over the last 6 months. **Public transport** usage was also far more common within Sydney, both over the last month and the last 6 months.

Overall usage of **taxis** and **public transport** has declined over the last 6 months, while **rideshare** usage has remained stable.

Fewer users reported failed attempts at using a booked or rank and hail **taxi** service or **rideshare** over the last six months.

Usage of P2P Transport *Public Transport use shown for reference*	Used in last month					Used in last 6 months					Failed attempt in last 6 months			
	Booked Taxi	Rank & hail taxi	*Any taxi^*	Ride-share	Public transport	Booked Taxi	Rank & hail taxi	*Any taxi^*	Ride-share	Public transport	Booked Taxi	Rank & hail taxi	Ride-share	Public transport
Sydney Metro	**14%**	**13%**	**(20%)**	**34%**	**70%**	**33%**	**29%**	**41%**	**56%**	**85%**	**20%**	**19%**	**30%**	
Central River City	16%	15%	(22%)	29%	70%	36%	31%	41%	52%	86%	28%	25%	32%	
Eastern Harbour City (North)	13%	14%	(20%)	36%	79%	34%	29%	44%	57%	89%	17%	17%	28%	
Easter Harbour City (South)	14%	13%	(21%)	48%	78%	34%	30%	45%	70%	90%	22%	22%	37%	
Western Parkland City	14%	10%	(18%)	23%	54%	27%	26%	35%	46%	75%	14%	14%	23%	
Non-Sydney	**13%**	**9%**	**(15%)**	**17%**	**31%**	**31%**	**22%**	**37%**	**37%**	**54%**	**15%**	**14%**	**18%**	
Illawarra-Shoalhaven City	10%	8%	(14%)	18%	38%	26%	20%	33%	40%	64%	11%	15%	17%	
Central Coast (NSW)	9%	6%	(10%)	17%	47%	24%	21%	29%	38%	68%	12%	11%	19%	
Lower Hunter & Greater Newcastle	12%	9%	(15%)	21%	36%	34%	23%	41%	46%	58%	15%	15%	21%	
Regional Towns w population 30K+	17%	11%	(20%)	16%	21%	36%	24%	39%	31%	44%	19%	17%	18%	
Rest of NSW	12%	6%	(14%)	6%	18%	29%	21%	35%	23%	43%	15%	10%	12%	
Total	**14%**	**11%**	**(18%)**	**27%**	**54%**	**32%**	**26%**	**39%**	**48%**	**72%**	**18%**	**17%**	**25%**	
Change in total since 2024	-3	-5	-4	0	-2	-4	-7	-5	1	-3	-5	-5	-2	

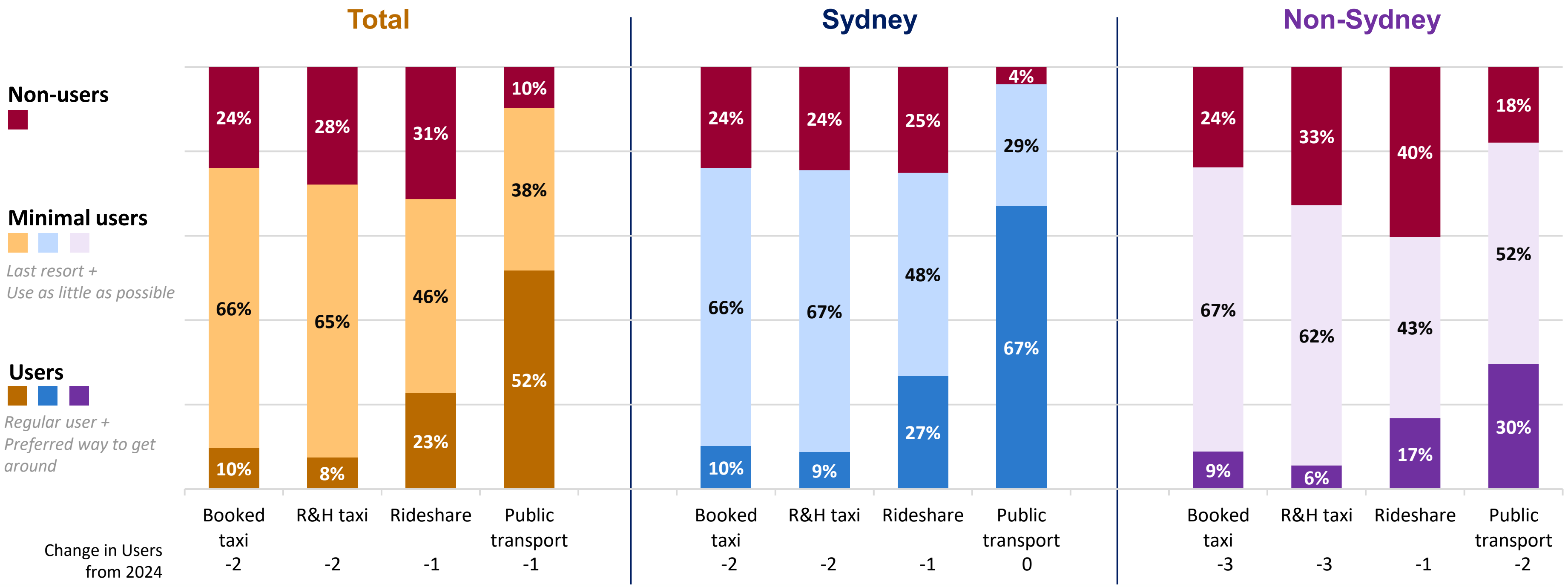
^ "Any taxi" usage score derived from responses to booked + rank & hail.

PREFERRED USAGE

While total use (*minimal users + users*) of **taxi** and **rideshare** services is approximately equal within Sydney, those outside of Sydney are far less likely to use **rideshare** at all. This sees **taxis** as more likely to be used across the state.

However, **rideshare** is far more likely to be used as a <u>regular</u> or <u>preferred</u> way to get around both within and outside of Sydney.

Across all locations, slightly fewer people reported regular or preferential use of both major P2P services compared to 2024, suggesting total demand may be slightly lower.



Lots of things affect how much people use these types of transport services – including being able to access the service when and where they want to use them, and the cost. **If <u>none</u> of these were a barrier for you, <u>ideally</u>, how much would you <u>like to use</u> these transport services in your day-to-day life?**

	Total: Booked taxi	Total: R&H taxi	Total: Rideshare	Total: Public transport	Sydney: Booked taxi	Sydney: R&H taxi	Sydney: Rideshare	Sydney: Public transport	Non-Sydney: Booked taxi	Non-Sydney: R&H taxi	Non-Sydney: Rideshare	Non-Sydney: Public transport
Less	20%	23%	20%	11%	22%	24%	19%	9%	17%	21%	22%	13%
Same	51%	53%	46%	45%	48%	49%	43%	43%	55%	59%	49%	47%
More	29%	24%	34%	44%	30%	27%	38%	47%	28%	20%	29%	40%
Differential	+9	+1	+14	+33	+8	+2	+19	+38	+11	0	+7	+27
Change in differential since 2024	-7	-7	-3	-4	-6	-4	-	-2	-10	-10	-6	-7

PERCEPTIONS

Consistent with 2024, **rideshare** services are perceived as getting better, while **taxi** services are perceived as getting worse. The gap between these services has widened following a 3-point decline for **taxis**. While **rideshare** shows a positive nett differential in all areas (albeit a smaller positive difference in the rest of NSW), Central River City is the only jurisdiction with a positive nett differential for **taxi** services. **Rideshare** is also perceived as being greater value for money, particularly in Sydney, where two-thirds consider the value for money good or okay, compared to less than half for **taxi**. However, the perceived value for money for both **taxi** and **rideshare** services has declined. Expressed preferences are similar, with **rideshare** leading **taxi** (particularly in Sydney), but with declines for both **taxi** and **rideshare** services.

	Change in last 1-2 years *% better minus % worse*			Value for money *% Good + OK*		Preference for using *Excludes either / neither*	
	Taxi	Rideshare	Public transport	Taxi	Rideshare	Taxi	Rideshare
Sydney Metro	**-4**	**17**	**9**	**47%**	**65%**	**19%**	**47%**
Central River City	4	21	19	54%	66%	22%	44%
Eastern Harbour City (North)	-11	11	7	43%	66%	19%	48%
Easter Harbour City (South)	-10	17	7	46%	74%	18%	56%
Western Parkland City	0	18	3	44%	55%	18%	38%
Non-Sydney	**-6**	**12**	**0**	**44%**	**48%**	**27%**	**35%**
Illawarra-Shoalhaven City	-9	10	-4	41%	52%	20%	42%
Central Coast (NSW)	-7	17	6	47%	55%	22%	34%
Lower Hunter & Greater Newcastle	-3	14	-3	45%	56%	24%	41%
Regional Towns w population 30K+	-4	13	3	45%	43%	34%	32%
Rest of NSW	-12	3	0	39%	28%	31%	21%
Total	**-5**	**15**	**5**	**45%**	**58%**	**22%**	**42%**
Change in total since 2024	-3	0	-7	-6	-3	-4	-6

A positive nett differential indicates more people feel a service has got better than feel it has got worse; while a negative nett differential indicates more people feel the service has got worse than better.

Section 2: Last Trip Experience

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LAST TRIP STATISTICS

Overall, around two-thirds of the last experiences reported were in a **rideshare**, with the remainder taken via **taxi**. This compares to 53% taken in **rideshare** last year, a pattern consistent with more frequent reported use of **rideshare**. Consistent with earlier findings, **rideshare** appears to be much more common within Sydney, with 71% of last trips being taken via **rideshare,** compared to 55% outside of Sydney.

Rideshare outperformed **taxi** in overall satisfaction as well as satisfaction with waiting times and fares. Although overall satisfaction and satisfaction with fares decreased for both **taxi** and **rideshare**, the **decreases** were larger for **taxi** – particularly with respect to satisfaction with fares. Satisfaction with waiting times declined slightly for **taxis**, but remained stable for **rideshare**.

Satisfaction is measured using a the standard NSW Government 7-point scale, with reported satisfaction being the total of 'very satisfied + satisfied + partially satisfied'.

	Last trip taken was in a…		Satisfaction with waiting time		Satisfaction with fare paid		Trip satisfaction	
	Taxi	Rideshare	Taxi	Rideshare	Taxi	Rideshare	Taxi	Rideshare
Sydney Metro	**29%**	**71%**	**73%**	**79%**	**55%**	**66%**	**72%**	**81%**
Central River City	37%	63%	75%	78%	51%	62%	70%	80%
Eastern Harbour City (North)	26%	74%	76%	79%	54%	66%	72%	81%
Easter Harbour City (South)	21%	79%	69%	79%	57%	67%	69%	83%
Western Parkland City	38%	62%	70%	82%	58%	68%	78%	82%
Non-Sydney	**45%**	**55%**	**76%**	**80%**	**52%**	**69%**	**71%**	**82%**
Illawarra-Shoalhaven City	38%	62%	74%	84%	54%	78%	74%	88%
Central Coast (NSW)	39%	61%	79%	77%	50%	61%	79%	92%
Lower Hunter & Greater Newcastle	34%	66%	85%	81%	53%	65%	76%	79%
Regional Towns w population 30K+	58%	42%	73%	76%	54%	69%	64%	76%
Rest of NSW	60%	40%	67%	77%	46%	77%	73%	82%
Total	**35%**	**65%**	**74%**	**79%**	**54%**	**67%**	**72%**	**82%**
Change in total since 2024	-12	+12	-2	0	-11	-3	-3	-1

Thank you

We would also like to acknowledge and thank all the participants who were involved in the research for their valuable contribution and input.

This project was conducted in accordance with the international quality standard ISO 20252 and the Australian Privacy Principles contained in the Privacy Act 1988.

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