# Annual Survey of Point-to-Point Transport Use 2022

1 July 2022

Since 2012, IPART has surveyed NSW residents annually about their use and perceptions of taxis and other forms of point-to-point (PTP) transport, such as rideshare and other hire vehicles.

This information paper sets out some of the key findings of the survey conducted during March 2022. The full 2022 survey report is available here.

## Background

Due to COVID-19 restrictions, we did not conduct a survey in November 2021, the usual timing for our annual surveys. Instead, we undertook the survey during March 2022. The method and questionnaire used in this 2022 survey were virtually identical to the previous three surveys in 2018, 2019 and 2020. The 2020 survey included additional questions related to the COVID-19 pandemic which were retained in the 2022 survey.

### The survey asks about different PTP transport services:


A **taxi** is a vehicle marked with a TAXI sign on its roof. Taxis can take booked passengers and passengers who hail them on the street or at a taxi rank.

A **hire vehicle** service provides a vehicle with a driver to transport passengers from one point to another for a fare. A hire vehicle can only take booked passengers. We asked about two categories of hire vehicles:

- **Rideshare** includes services such as Uber, Ola, Shebah and Didi.
- **Limousines and other hire vehicles** include other booked transport services with a vehicle and driver.

IPART acknowledges the Traditional Custodians of the lands where we work and live. We pay respect to Elders, past, present and emerging. We recognise the unique cultural and spiritual relationship and celebrate the contributions of First Nations peoples.

**We surveyed over 3,000 people from three geographical regions of NSW.**

Three independent samples were obtained from surveying people from three categories of geographical regions. The samples were collected to meet demographic quotas and to match ABS population proportions.

Sydney
Metropolitan Sydney

Other Urban
Newcastle, Wollongong, Gosford, Wyong

Rest of NSW
Areas outside of Sydney and other urban centers

# Key findings

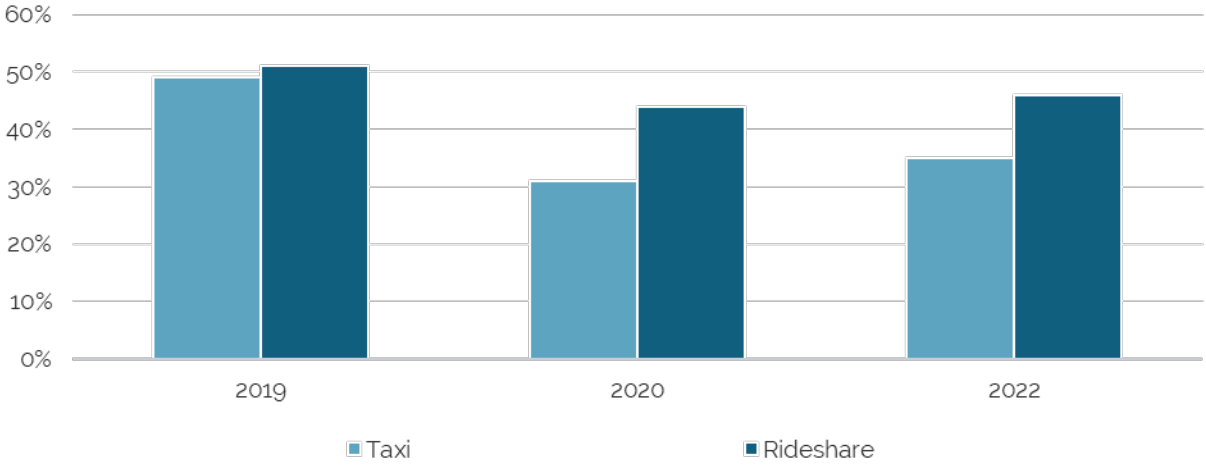
- Use of PTP transport overall in 2022 increased slightly from 2020 but is **still below pre-COVID-19 figures**.
- The pattern of PTP transport usage over the years indicates that **rideshare is now a fully mature service in Sydney**.
- Performance of PTP transport services has changed minimally since 2020. For all service types and locations, **overall trip satisfaction remains high**.
- Compared to results in 2020, there has been slight positive change in the **perception** of taxis; however, many rideshare indicators fell slightly.
- Rideshare overall is still perceived more positively than taxis, particularly in terms of waiting times and satisfaction with fares and value. **Perceptions are generally supported by last-trip data** (that is, reported waiting times are shorter and reported fares are cheaper for rideshare compared to taxis). However, **instances of failed trips** have increased for rideshare but have steadied for taxis.
- Reported **taxi fares were higher in Sydney than in all other regions**, but rideshare fares had less variation across locations.

## PTP transport use rose in Sydney but is still below pre-COVID levels

Survey results since 2019 show that use of PTP transport services significantly declined due to COVID-19. This decline was also seen in the use of other types of transport including public transport.

Reported taxi use in 2022 has increased slightly in Sydney; however, the figures remain below those of the 2019 pre-COVID figures. The survey results show that 35% of respondents in Sydney used taxis at least once in the last 6 months, which is up from 31% in 2020, but significantly below 49% in 2019. This pattern is consistent with rideshare use in Sydney, where reported use fell from 51% in 2019 to 44% in 2020 and rose slightly to 46% in 2022.

### Figure 1 Usage levels of PTP transport are still below pre-COVID figures




Source: ORIMA 2022 Point-to-point Transport Survey Report

## Outside Sydney, taxi and rideshare use had different patterns of recovery

Taxi use in Other Urban areas fell from 35% in 2019 to 23% in 2020 and fell again in 2022 (21%). Taxi use in Rest of NSW fell from 34% in 2019 to 21% in 2020 and has not recovered in 2022 (20%). On the other hand, rideshare use rose in Other Urban and Rest of NSW in 2022 compared to 2021 and is now at its highest level ever in Rest of NSW (15%).

## Users confident in COVID-19 safety measures in PTP transport in 2022

The survey also included questions on COVID-19 considerations and how PTP transport services applied pandemic safety measures, including mask-wearing, sanitising and social distancing. A large majority of respondents reported good or acceptable use of all these safety measures and results were consistent with 2020 (if not more positive). Confidence in using taxis in a COVID-19 environment also improved in 2022 while confidence in using rideshare was the same.

## Rideshare is now a fully mature service in Sydney

The overall pattern of survey results over the years indicates that rideshare is now a fully mature service in Sydney. Rideshare is close to maturity in Other Urban areas but is still an emerging service in the Rest of NSW.

Awareness of taxi, rideshare and other hire vehicle services in 2022 remains similar to 2020 results. For rideshare this indicates previously rising awareness has steadied outside of Sydney as it matures.

In Sydney, frequency of usage for both taxi and rideshare users remains consistent since 2020. Of people who use the services, 50% use taxis at least monthly and 67% use rideshare services at least monthly. Across all regions, people who use rideshare services continue to do so more frequently than those who use taxis or other hire vehicles.

## Perceptions of taxis and rideshare have changed slightly since 2020

Perceptions of rideshare services fell back slightly from 2020, while perceptions of taxis steadied.

Rideshare services have perceived strengths above all other PTP transport services in the practical dimensions which include *value for money, convenience, waiting times* and *availability*. However, compared to 2020, many rideshare indicators fell slightly in 2022. Some of these include experience of failed trips, encountering a problem, waiting times, and fare satisfaction.

Limousines and other hire vehicles have key strengths in the perceived quality dimensions plus *safety*, with a relative weakness in the practical dimensions. Taxis do not have key points which differentiate them as clear strengths above the other services.

In 2022 the perception of 'value for money' for taxis had improved slightly compared to 2020.

Taxis outrated rideshare in some perceived quality dimensions including *navigation and route knowledge* and *driving skills*. However, rideshare scored better in v*ehicle quality, driver presentation and attitude*, and *customer service*.

Rideshare is also stronger in most usage aspects. Perceived advantages of rideshare over taxis such as waiting times and satisfaction with fares are reinforced by actual last-trip data. Last-trip data indicates that waiting times for rideshare are slightly shorter than comparable ASAP booked taxis and fares are somewhat lower.

## Taxi fares were higher in Sydney compared to all other regions

As with previous survey results, rideshare services are perceived to offer better value for money than taxis in all regions. However, respondents are less positive about the value of rideshare services than they were in the 2020, and slightly more positive about the value of taxis.

Rideshare being perceived as better value for money than taxis is supported by last-trip data. The survey results show that median reported taxi fares were higher than rideshare fares in Sydney and other urban areas. Compared to 2020, the median taxi fare and rideshare fare both increased by $5.

| Median taxi fare in Sydney | VS | Median rideshare fare in Sydney |
|---|---|---|
| $35 | | $25 |
| Outside Sydney: $20-25 | | Outside Sydney: $20-25 |

For all PTP transport types, many respondents indicated that they would be likely to use them more if fares get cheaper. For taxis, this is the most dominant factor identified by 44% of respondents.

## Usage patterns and performance of PTP transport services have changed minimally

Methods of obtaining a vehicle and purposes for using the services are the same as previous survey years. Socialising remains the dominant purpose for all trips, especially for rideshare users.

Just under half (48%) of employed respondents in Sydney indicated that their employer at least sometimes paid for using PTP transport. Respondents in all areas indicated that rideshare and other hire vehicles are more likely to be covered by their employers in 2022 compared with 12 months previously. However, employers are also still more likely to have a policy or preference for taxis over other forms of PTP transport

Performance and satisfaction of users with PTP transport services have also changed minimally. Compared to 2020, waiting times for all services have become slightly longer. Rideshare waiting times continue to be viewed more favourably than taxi waiting times.

Overall last trip satisfaction has generally shown a small advantage for rideshare services over taxis. However, instances of failed trips and experiencing a problem have notably increased for users of rideshare but have steadied for taxis. Overall, at least 4 in 5 respondents indicated they were at least slightly satisfied with their last trips.

Overall trip satisfaction remains high. Survey results suggest that PTP transport services in NSW are largely meeting the needs and expectations of the users.