Independent Pricing and Regulatory Tribunal of NSW

2019 Point-to-Point Transport Survey Report

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25 November 2019

Community Measurement & Program Evaluation Solutions

ORIMA RESEARCH

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Contents

Appendices

This research was conducted in accordance with our ISO20252 accreditation.

1. Executive Summary

Source of data: The 2019 IPART Point-to-Point Transport Survey is the third annual survey using a revised and updated questionnaire. Three independent samples are used, one for Sydney (n=2095 respondents), one for 'other urban' areas (n=522) and one for the rest of NSW (n=446). The new questionnaire captures equivalent data for taxis, rideshare and limousines / other hire vehicles. The post-2018 samples are structured and weighted to match as closely as possible the 2017 sample in order to maximise comparability across waves.

Overview of key results

Surveys of the point-to-point transport market in NSW have tracked the rapid emergence of rideshare services into the long-established taxi market. Their penetration now equals or exceeds taxis in Sydney, but lags in Other Urban areas, and lags further again in the Rest of NSW.

However, after a period of consistent growth, numerous indicators in the 2019 survey suggest a slowing or flattening of rideshare growth in the last 12 months. Interestingly, this is at a level of equivalency with taxis in some cases, and this may be reflective of a natural balance point that is being reached. Although the market transition outside of Sydney lags behind, a similar drop off in the rate of growth was observed in 2019. Examples of rideshare indicators where this pattern is evident include:

- Awareness, preference and usage indicators
- Satisfaction indicators overall and with specific aspects of last experiences including waiting times and fares, and an increase in experience of problems
- Reduced impact of last trip experience on likelihood to re-use

At the same time, while perceptions of the competitive advantages (or otherwise) of taxis have not changed substantially, there are a number of stronger indicators about taxi use in 2019. These include:

- A slower perceived rate of decline in usage
- A slight increase in overall satisfaction with the service available and stronger views of the practical and quality dimensions of taxi services, including value for money
- Satisfaction indicators, such as waiting time and fares as well as overall satisfaction, and a reduction in experiencing problems
- Impact of last trip experience on likelihood to re-use

Taken together, these indicators don't suggest that rideshare will diminish in the marketplace at all, but do suggest the period of constant growth may be coming to an end. Future years of monitoring will be required to determine whether this pattern is reflective of a new 'post-emergence' phase, or simply a slight aberration or pause in growth.

Beyond this apparent inflexion point in the growth of rideshare services, most of the other patterns and relativities within the survey that have been seen in 2017 and 2018 still hold. Rideshare is strongly differentiated by its perceived value proposition, and this is reflected in estimated fares paid. Taxis are thought to have a weakness compared to rideshare in terms of waiting times and availability, but this is not reflected in the reported waiting times for last trips, where the two services are quite equivalent (other than for ASAP bookings, where rideshare does retain an advantage).

Limousines and other hire cars remain a relatively minor part of the marketplace, and are perceived to fill a higher quality / higher cost niche.

Methods of obtaining point-to-point transport have fluctuated somewhat over the years. Hailing taxis in Sydney has become steadily less common, while use of apps to obtain taxis has become more common, particularly in the last 12 months. Overall last trip satisfaction with sits at above 85% for all types of point-to-point transport services in all locations.

2. Introduction

A. Background

The Independent Pricing and Regulatory Tribunal (IPART) provides independent regulatory decisions to balance the rights and needs of NSW citizens, taxpayers and service providers. Taxi services have long been among the services IPART contributes to the regulatory environment for. Recent years have seen dramatic changes to the point-to-point transport services environment in which taxis operate, in particular the rapid emergence of rideshare and other hire vehicle categories.

Since 2012 IPART has conducted regular surveys of NSW residents on their experiences, as well as their reasons for using point-to-point transport options. The 2017 survey was timed to run just prior to changes to the regulation of taxis and other point-to-point transport services that came into effect on November 1 2017. With the changes in landscape and regulations, the 2017 survey took the opportunity to substantially revise the questionnaire to better reflect the current and anticipated short-to-medium term context, in particular adopting an approach of having parallel questions for taxis, rideshare and 'limousines and other hire vehicles' to maximise the consistency and comparability of data across these different services. Throughout the report, the results from the different transport services are reported in parallel.

Where possible, questions in the new survey retained consistency with previous questions to allow some ongoing tracking. However, 2017 was seen as the opportune time to update the questionnaire to best suit the current situation, and in most cases future relevance was given priority over continuity. To aid calibration of the new method to the historical data, a small concurrent survey utilising the previous method was also conducted.

After the substantial changes in 2017, the 2018 survey placed the primary emphasis on methodological consistency to maximise comparability and sensitivity to any changes since the previous year. A virtually identical questionnaire and source of data were used in 2018, and then no substantive changes were made at all from 2018-2019. This allows the focus of the reporting to be on updating results and identifying any changes over time.

B. Research objectives

The purpose of the survey is to collect data on NSW residents' experiences with and perceptions of point-to-point transport service options.

Specific objectives are to measure:

- Awareness of transport options available in their location
- Usage of transport services, including change in usage in the last 12 months
    - Impact of use of hire vehicles on use of taxis
- Satisfaction with the available transport services
- Incidence of problems trying to use transport services, and alternatives used as a result
- Methods used to obtain point-to-point transport services
- Perceived value for money
    - Possible impact of minimum rank and hail taxi fares

- Perceived reasonableness of waiting times
- Workplace policies towards point-to-point transport options
- Detailed information about the last trip undertaken
- Perceptions of the strengths and weaknesses of different service options
- Preferences for different service options
- Awareness of the impending regulatory changes.

C. Methodology

The 2019 methodology was identical to 2017 and 2018. The 2019 survey was administered online to a total of 3,063 NSW residents between 19 October and 4 November 2019 (including a brief pause to examine and confirm pilot data). Three independent samples were obtained:

1. Sydney n=2095
2. Other Urban (Newcastle, Wollongong, Gosford and Wyong) n=522
3. Rest of NSW n=446

Respondents were all members of the ORU online research panel. Panel members are recruited via a combination of online and offline methods to maximise representativeness, and all incentives provided for participation are sent to physical addresses to ensure geographic correctness.

Interlocking age and gender quotas were applied at the time of data collection to match ABS population proportions. In 2017 all age by gender cells were within 1% of the target quota with the exception of 16-29 year old males in the Other Urban sample (who were slightly under sampled), and no weighting was applied to the data for analysis due to its close alignment with the target profiles. The same quota system has been applied in future surveys, but slight variations in exact respondent numbers are always observed. To completely maximise comparability to the 2017 benchmarks, data in later surveys is weighted to exactly match the 2017 sample proportions.

The base questionnaire was developed 2017 by ORIMA Research in collaboration with IPART. This drew on the previous questionnaire where possible, while updating the content and format to better suit the operational balance of taxis and hire vehicles in NSW. The 2018 questionnaire updated codeframes in several questions to reflect answers in 2017, and collect additional detail for some questions (eg: pick up and set down locations). The 2019 survey only updated changed provider names, but in all substantive aspects was identical to 2018.

A copy of the questionnaire can be seen in Appendix A.

The questionnaire took an average of 9.2 minutes for respondents to complete.

Demographic details of the sample can be seen in Appendix B.

Note that throughout the report where sample sizes drop below a minimum threshold of n=30 for any subsample, these results are shown in grey or semi-transparent form. These results should be interpreted with caution as being indicative only.

Comparisons to data prior to the 2017 benchmarks should be made with caution due to the substantial change in methodology.

3. Main Survey Findings

Definitions

This report refers to three geographic regions and three types of point-to-point transport services. Each of these has a distinct colour associated with it, used consistently in tables and charts to more easily identify which area and service results relate to.

Geographic areas

	Sydney	Metropolitan Sydney
	Other Urban	Newcastle, Wollongong, Gosford, Wyong
	Rest of NSW	All other areas of NSW outside Sydney and the other urban centres

Point-to-point transport services

	Taxis	A vehicle clearly marked as a taxi and with a TAXI sign on its roof – refers to rank & hail and booked taxis unless otherwise specified.
	Hire Vehicles	Hire vehicle services provide a vehicle with a driver to transport you from one point to another for the payment of a fare
	Rideshare	Rideshare services like Uber, Go Buggy, Ola or Bolt
	Limousines or other hire vehicles	Other hire car services with a driver

Note: Throughout the main body of the report there are tracking charts showing changes in key measures across multiple surveys. Many of these show just the directly comparable 2017-2019 data, but where suitably comparable data from earlier surveys exists this is also shown. Full data tables for the tracking charts can be seen in Appendix E.

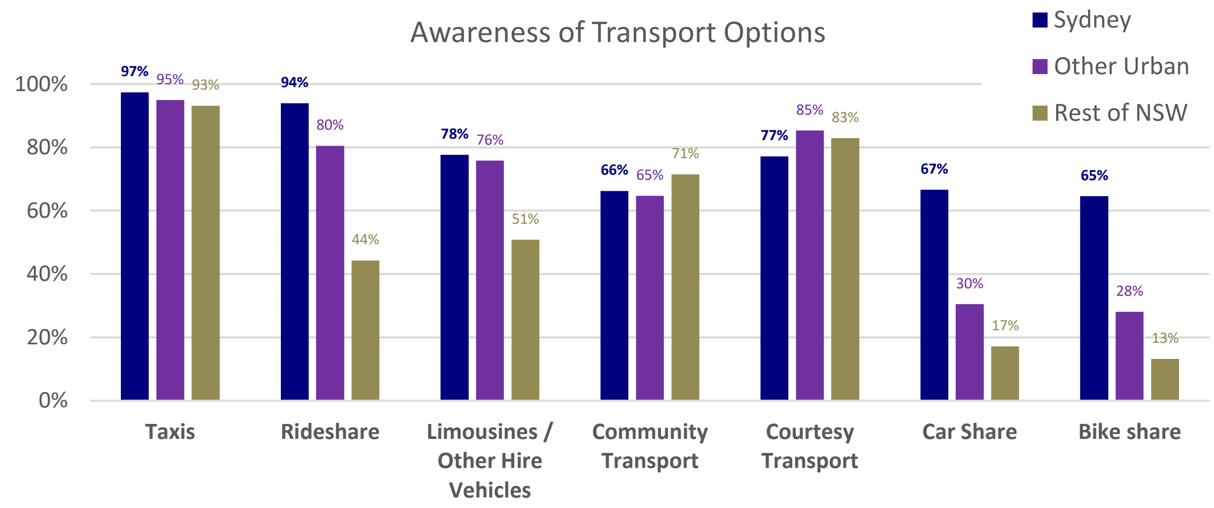
A. Local Transport Services

Awareness and Use

In all three locations, taxis remain the point-to-point transport service with the highest **awareness**, with nearly everyone in Sydney and the other urban areas aware of operating taxis, and more than 90% in the rest of NSW. Awareness of taxi availability was steady across all locations.

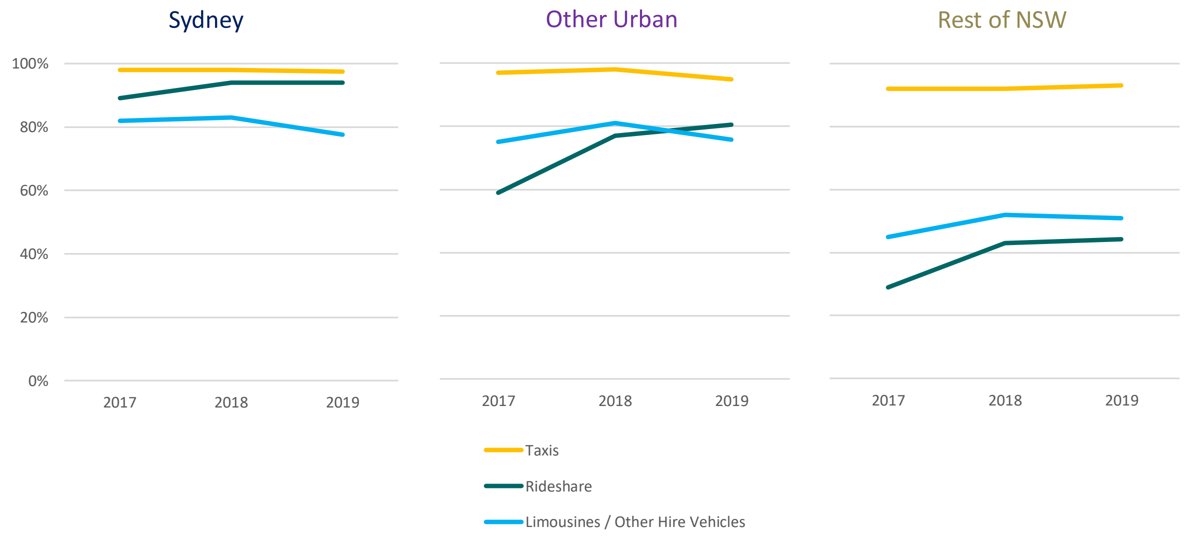
The growing emergence of rideshare has mostly plateaued in 2019, with only marginal increases seen in all locations. In Sydney, awareness of rideshare is approximately level with taxis, but remains lower outside of Sydney where rideshare has been and evidently remains less prevalent.

Figure 1: Awareness of point-to-point transport services in their location Q5/8/11



Base = all respondents [Sydney n=2095; Other Urban n=522; Rest of NSW n=446]

Figure 2: Change in awareness of point-to-point transport services in their location Q5/8/11



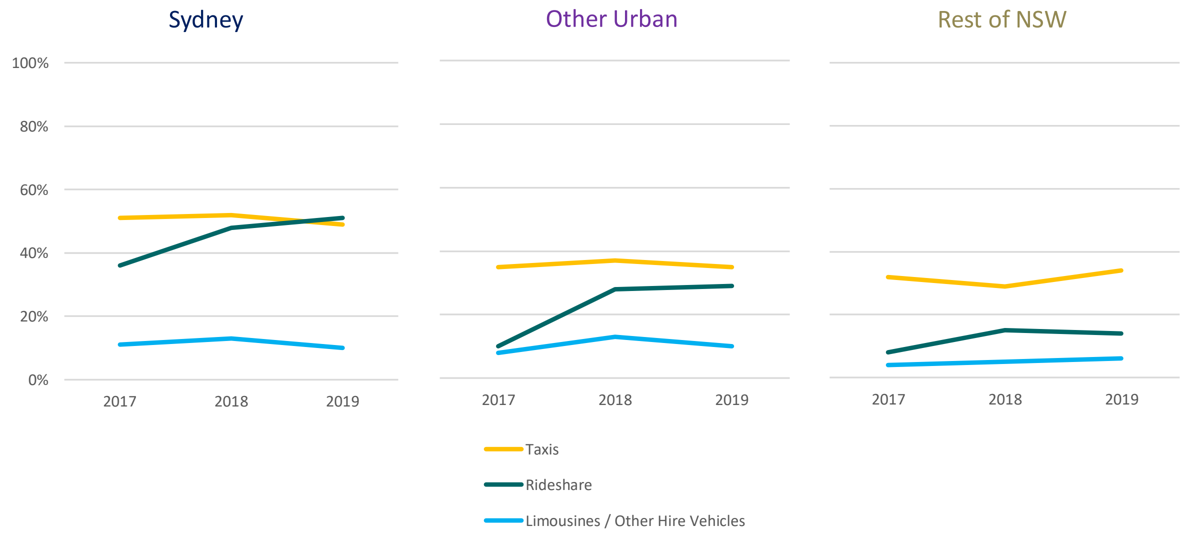
Usage of taxis was by far the most common of the different types of transport prior to 2018. However, increases in reported use of rideshare in both Sydney and other urban areas in the last two years now reflect much less difference, and none in Sydney.

Figure 3: Usage of point-to-point transport services in the last 6 months among all respondents and among those aware of the service in their area Q6/9

Use in the last 6 months		Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
		Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Used in last 6 months (Base = all respondents)	**2019**	**49%**	**35%**	**34%**	**51%**	**29%**	**14%**	**10%**	**10%**	**6%**
	Sample size	*2095*	*522*	*446*	*2095*	*522*	*446*	*2095*	*522*	*446*
	2018	52%	37%	29%	48%	28%	15%	13%	13%	5%
	Sample size	*2147*	*533*	*478*	*2147*	*533*	*478*	*2147*	*533*	*478*
	2017	51%	35%	32%	36%	10%	8%	11%	8%	4%
	Sample size	*2048*	*501*	*453*	*2048*	*501*	*453*	*2048*	*501*	*453*
Used in last 6 months (Base = aware of service)	**2019**	**51%**	**36%**	**37%**	**54%**	**36%**	**31%**	**13%**	**13%**	**11%**
	Sample size	*2040*	*497*	*415*	*1968*	*420*	*197*	*1626*	*396*	*227*
	2018	53%	38%	32%	51%	36%	35%	15%	16%	10%
	Sample size	*2104*	*523*	*438*	*2015*	*409*	*205*	*1784*	*432*	*247*
	2017	52%	36%	35%	41%	17%	27%	14%	10%	9%
	Sample size	*2009*	*487*	*146*	*1825*	*297*	*131*	*1686*	*374*	*202*

In Sydney, 49% of respondents reported having used a taxi in the last six months, for the first time lower compared to 51% who reported using rideshare. In other urban areas the difference was still 35% compared to 29%, but the difference has reduced from 25% in 2017 to just 6% in 2019. In the rest of NSW, the difference has ranged from 24% in 2017 to 14% in 2018, and is at 20% in 2019.

Figure 4: Change in usage of point-to-point transport services in the last 6 months among all respondents Q6/9

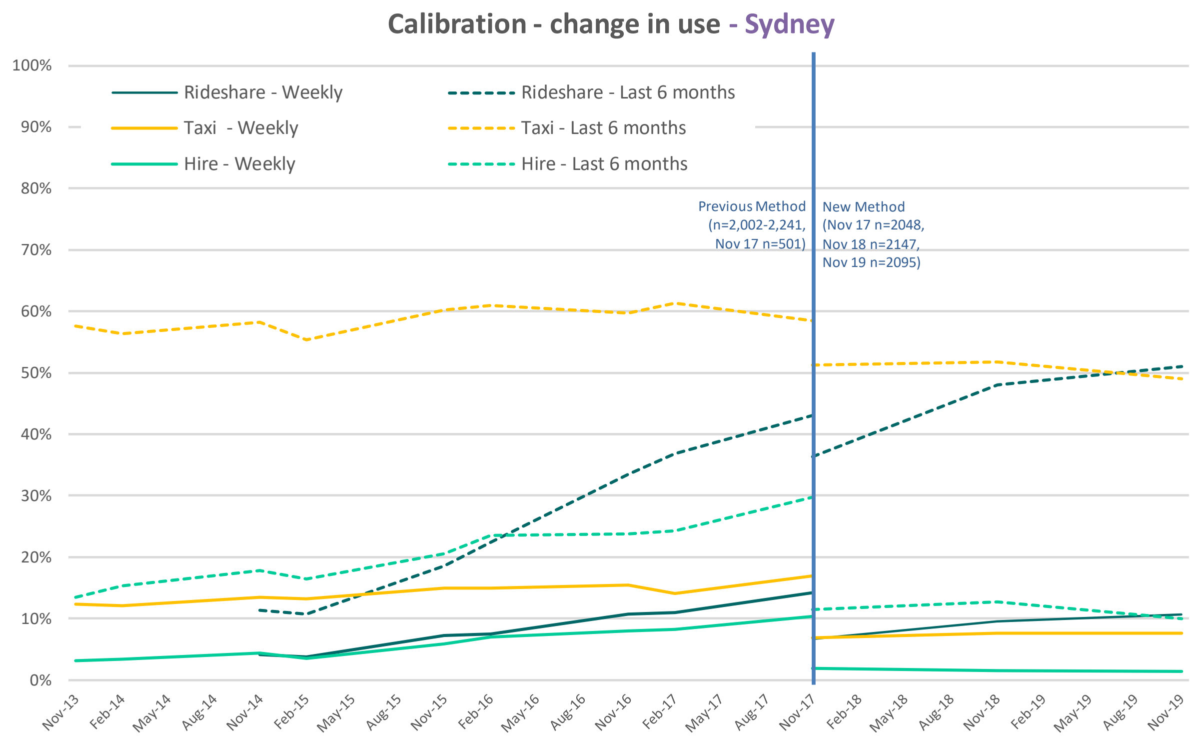


As with awareness, there has been a slowing in the rate of increase of use of rideshare in the 2019 survey. In all three regions the proportion of all respondents reporting using rideshare in the last six months was either flat or only slightly higher, after a period of sustained faster growth. In both Sydney and Other Urban areas, the reported use of rideshare and taxis was similar, though rideshare just pipped taxis in Sydney for the first time. The bottom part of Figure 3 shows that even amongst those who were aware of rideshare services, use was similar to the last 12 months.

Measurement of usage of point-to-point transport services is one of the key purposes of the survey. The change in method for measuring usage from a 'one-step' process of measuring awareness, usage and frequency to an iterative three-step process in 2017 resulted in an apparent discontinuity in the longer-term track. To confirm that underlying trends continued to operate and to assist in calibrating the new methodology to the older data, IPART conducted a small scale version of the previous methodology concurrently with the new survey in November 2017.

This exercise enabled us to look at data from the two methodologies at the same point in time – represented by the solid vertical line in the chart below. In November 2017 this gave us the confidence to conclude that although the new methodology yields a lower estimate of usage at a weekly and 6-monthly level, that the underlying paradigm remained in place. The addition of the 2018 data using the new methodology confirmed this, with the results showing a continuation of the steady increase in use of rideshare, alongside the more consistent level of use of taxis.

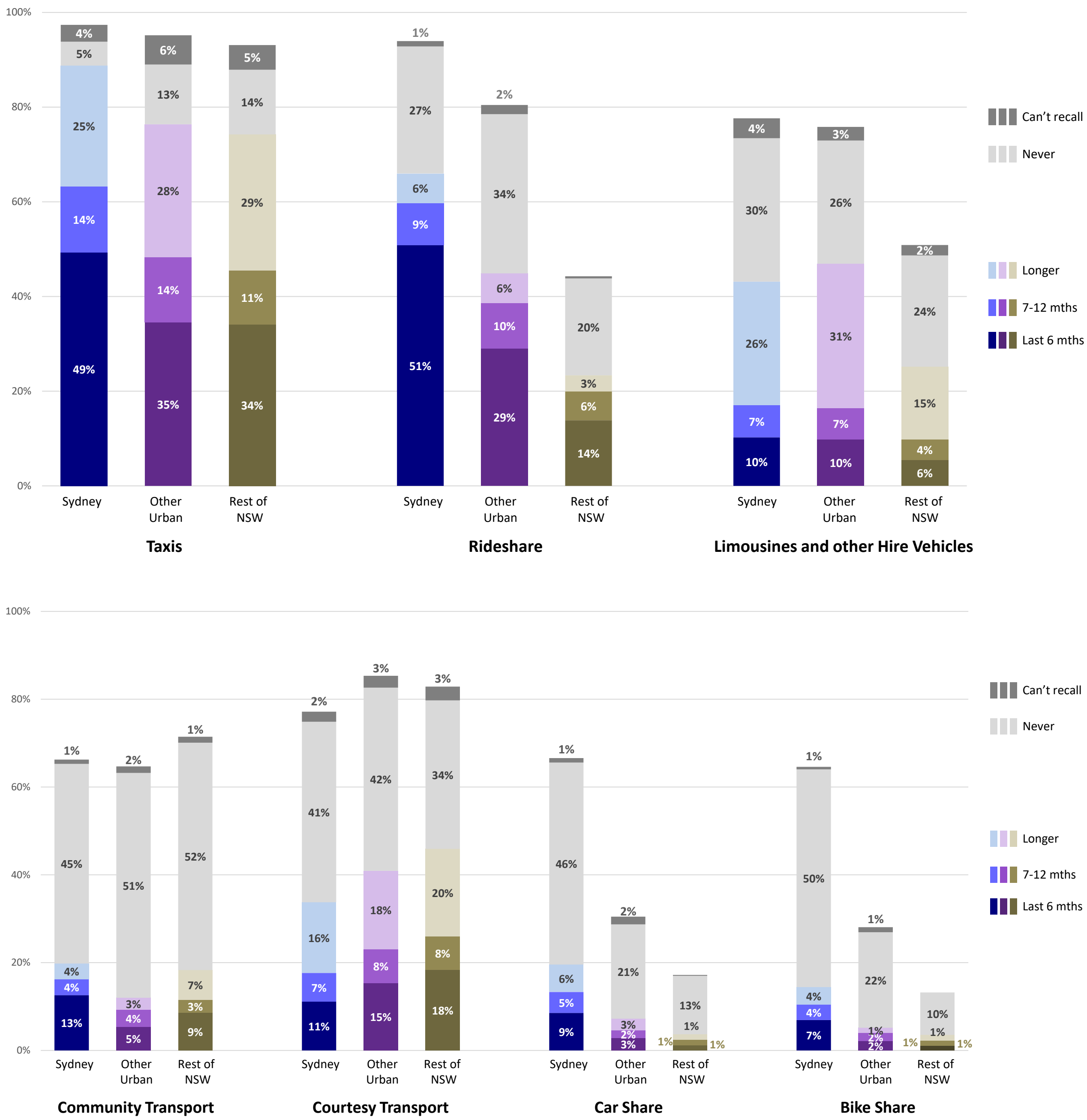
The 2019 survey shows an apparent slowing of the growth of rideshare into the NSW market. After a steady rate of growth observed across both survey methods from 2014 to 2018, the 2019 data shows a plateauing of rideshare use at about the same level as use of taxis. Future years will determine whether this reflects the reaching of a more stable phase, or if this is more of a pause in the growth pattern



The pattern of relative usage across different transport options broadly matches relative awareness of availability. Usage of limousines and hire vehicles and community transport are low compared to awareness, reflecting the nature of these particular services.

Compared to taxis and limousines and other hire vehicles, there are relatively few people who have used rideshare at all, but not in the last 6 months. Compared to taxis in particular, there remains a much larger proportion of people who have never used rideshare.

Figure 5: Breakdown of usage of point-to-point transport services Q6/9/12



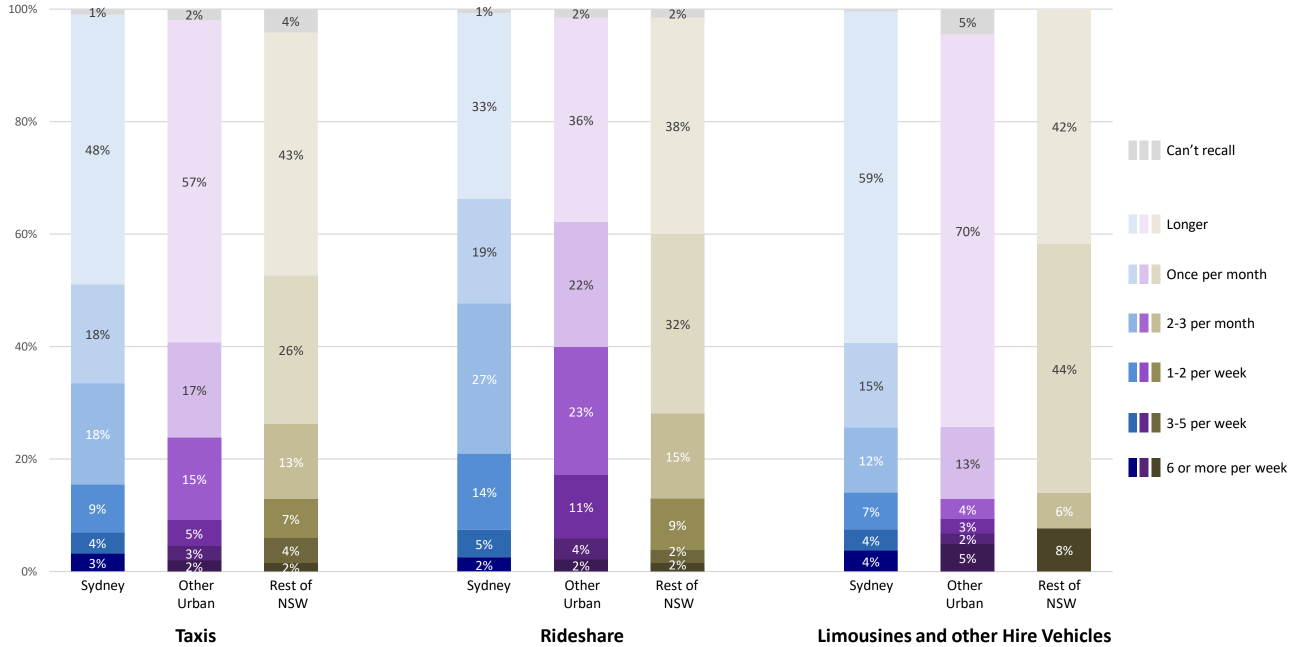
Base = All respondents [Sydney n=2095; Other Urban n=522; Rest of NSW n=446]

Frequency of Use

The chart and table below show the breakdown <u>only of those respondents who had used taxis or hire vehicles in the last 6 months</u>.

It suggests that in all areas, people who use rideshare services do so somewhat more frequently than do those who use taxis or limousines and other hire vehicles, a pattern consistently seen in 2017-18.

Figure 6: Frequency of using point-to-point transport services among service users Q13
Base = used in the last 6 months

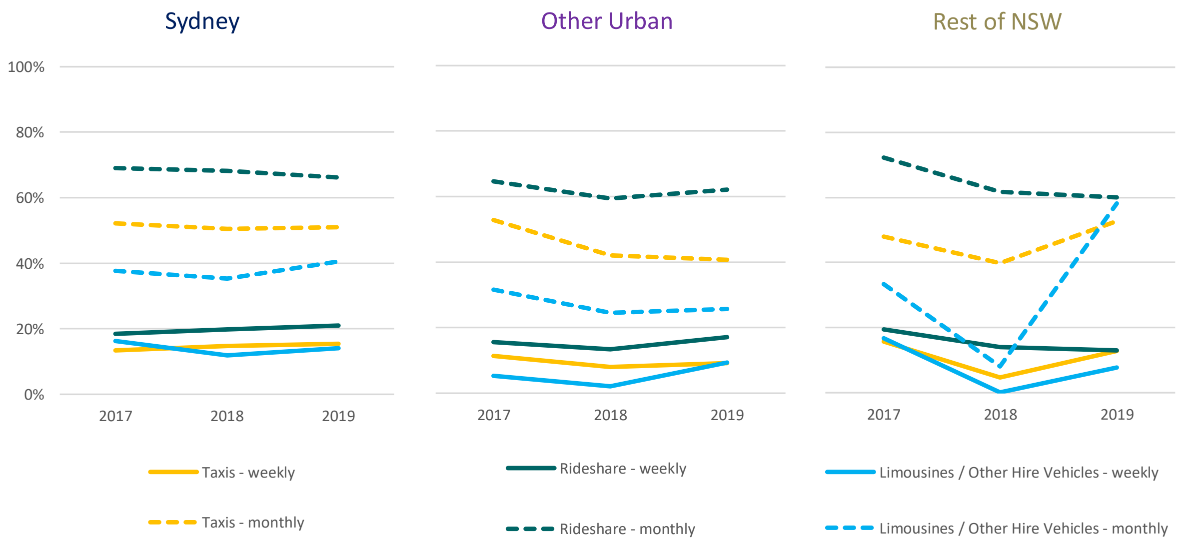


Base = Used service in the last 6 months [See sample sizes in table]

Frequency of use in the last 6 months	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
***Base** = used in the last 6 months*	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Proportion used in last 6 months	**49%**	**35%**	**34%**	**51%**	**29%**	**14%**	**10%**	**10%**	**6%**
Sample size	*1033*	*180*	*152*	*1065*	*152*	*62*	*214*	*51*	*25*
6 or more times per week	3%	2%	2%	2%	2%	2%	4%	5%	8%
3-5 times per week	4%	3%	4%	5%	4%	2%	4%	2%	0%
1-2 times per week	9%	5%	7%	14%	11%	9%	7%	3%	0%
At least weekly	**15%**	**9%**	**13%**	**21%**	**17%**	**13%**	**14%**	**9%**	**8%**
2-3 times per month	18%	15%	13%	27%	23%	15%	12%	4%	6%
Once per month	18%	17%	26%	19%	22%	32%	15%	13%	44%
At least monthly	**51%**	**41%**	**53%**	**66%**	**62%**	**60%**	**41%**	**26%**	**58%**
Less often	48%	57%	43%	33%	36%	38%	59%	70%	42%
Can't recall	1%	2%	4%	1%	2%	2%	0%	5%	0%

Tracking the frequency of use over 2017-18-19 shows that the tendency for greater proportions of rideshare users to be active on a weekly or monthly basis has been consistent across this timeframe.

Figure 7: Change in frequency of using point-to-point transport services among service users Q13
Base = used in the last 6 months



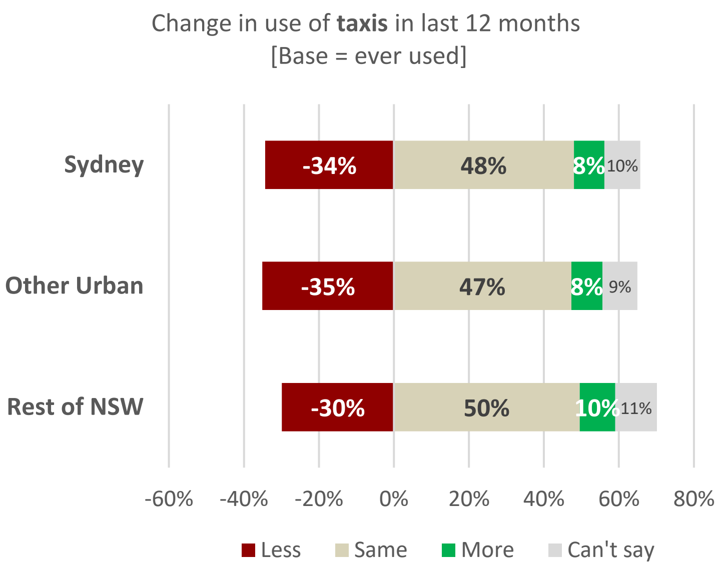
Note: Small sample sizes apply to the use of limousines and other hire vehicles in the Rest of NSW sample, which largely accounts for the high degree of variability seen in that track.

Changes in Usage

Compared to the previous 12 months

Broadly, people who have ever used taxis and limousines or other hire vehicles perceive that their use of them is decreasing; while people who have ever used rideshare are more likely to perceive their use is increasing. The tracking chart on the following page shows that, consistent with other observations of rideshare's growth slowing in 2019, the rate of perceived change amongst rideshare users was considerably lower than in the previous survey.

Figure 8: Change in use of transport services in the last 12 months amongst those who have ever used transport services Q16

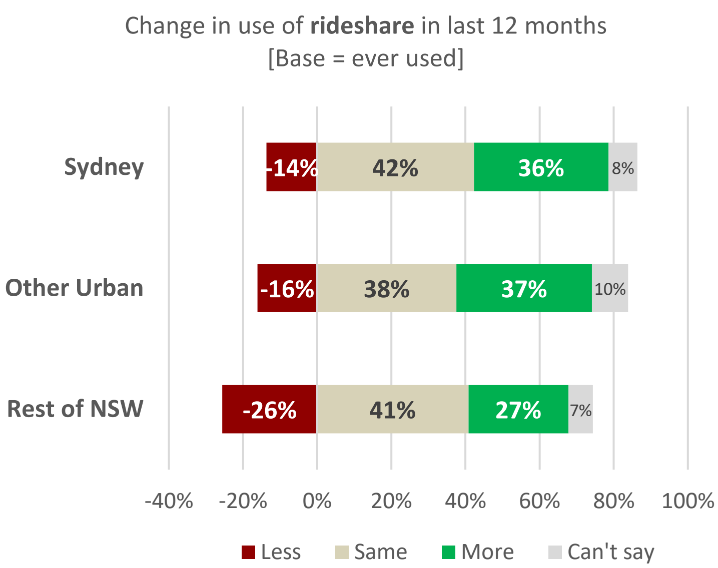


Base = Used in last 12 months [Sydney n=1859; Other Urban n=399; Rest of NSW n=331]

Around half of taxi users in each location indicated their use in the last 12 months was unchanged to the previous 12 months.

As in previous years, there is a significant **nett negative movement** in each location (ie: more users said they had used taxis less than said they had used them more) – though the rate is essentially steady compared to 2018.

The nett change was -26% in Sydney, -27% in Other Urban, and -20% in the rest of NSW.



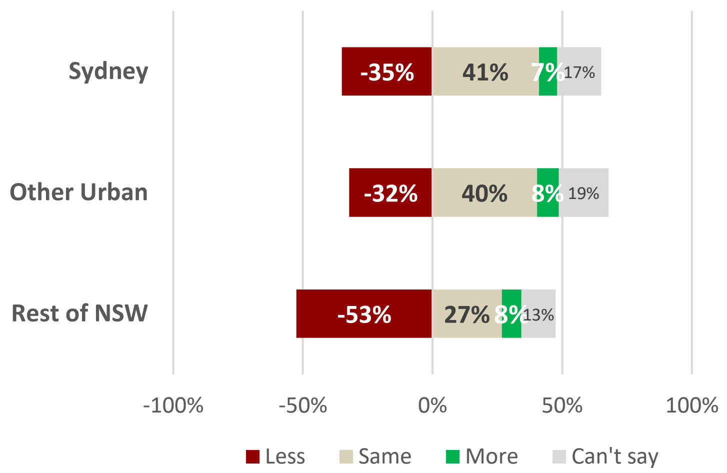
Base = Used in last 12 months [Sydney n=1382; Other Urban n=234; Rest of NSW n=104]

Amongst those people who had ever used rideshare, there was a strong **nett positive movement** in all three locations (ie: more people indicated they had used rideshare *more* often in the last 12 months compared to the previous 12 months).

In all locations though, the nett differential was much lower than in 2018.

The nett changes were +22% in Sydney (compared to +29% in 2018); +21% in Other Urban (+34% in 2018); and +1% in the rest of NSW (+20% in 2018).

Change in use of **limousines & other hire vehicles** in last 12 months [Base = ever used]



Base = Used in last 12 months [Sydney n=904; Other Urban n=245; Rest of NSW n=112]

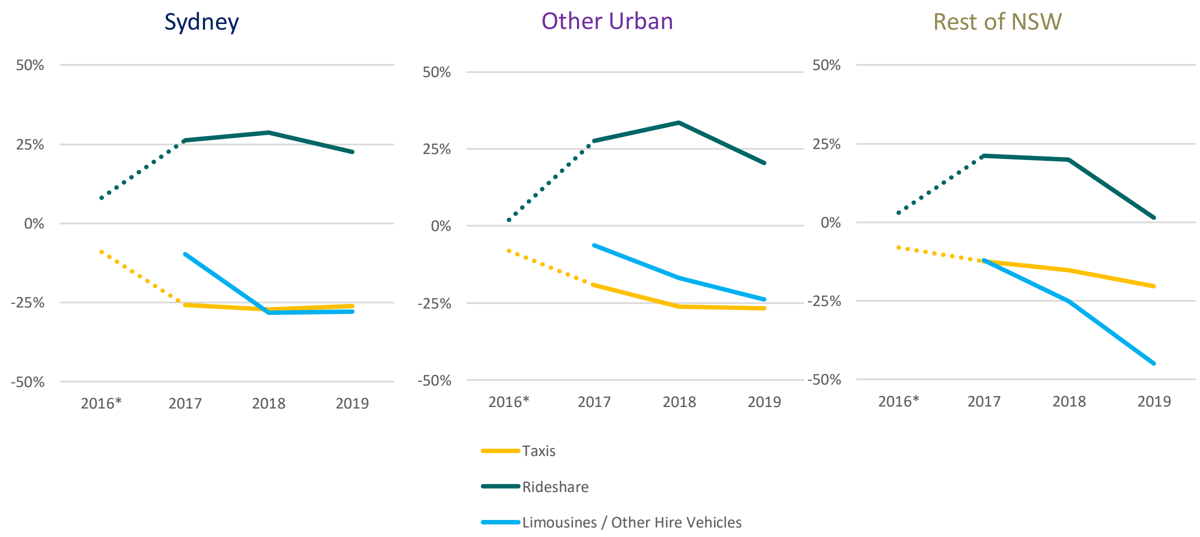
Like taxis, respondents who have ever used limousines or other hire vehicles also report a **nett negative** movement in the last 12 months (ie: they are doing so less often in the last 12 months).

The nett negative differentials were all comparable to 2018.

The nett changes were -28% in Sydney, -24% in Other Urban, and -45% in the rest of NSW (this last figure is quite a bit higher than in 2018, but calculated from relatively small samples where greater natural variability would be expected).

Figure 9: Rate of change in use of transport services in the last 12 months amongst those who have ever used transport services. Q16

Chart shows nett differential (ie: % reported an increase in use minus the proportion who reported a decrease in use)



Note: Small sample sizes apply to the use of limousines and other hire vehicles in the Rest of NSW sample, which largely accounts for the high degree of variability seen in that track.

<u>Reasons for changes in use</u>

For respondents who have **used taxis more** in the last 12 months, as in 2017-18, one of the most commonly cited reasons was higher primary need – going out more or needing to get around more. However, in 2019, as many people who had used taxis more often cited reasons such as seeming less expensive or being faster and more reliable to use. This pattern has not been as strong before.

By comparison, for rideshare the most commonly cited reasons for using them more often are related to fares (seeming less expensive, or getting a fare estimate), and to reliability. Even though there is crossover in these reasons with those cited by people who use taxis more, they are much more common in reference to rideshare.

Figure 10: Reasons for using transport services more in the last 12 months Q18

NOTE: Small bases sizes. Interpret grey numbers with caution

Reasons why transport services have been used **more** in the last 12 months	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base *= used service more in the last 12 months*	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*151*	*33*	*31*	*502*	*86*	*28*	*64*	*20*	*8*
I find them **less expensive** than before	22%	**28%**	13%	**49%**	**54%**	**48%**	20%	-%	**46%**
I have **more disposable income**	17%	15%	17%	10%	7%	7%	8%	8%	24%
I'm **going out more** / needing to get around more	20%	**37%**	**25%**	22%	**28%**	24%	23%	18%	13%
Because I **don't have to wait as long to catch one**, or I think one is **more likely to turn up** after I've booked it	19%	**25%**	16%	**42%**	**33%**	**29%**	17%	22%	**25%**
I have **less access to alternatives**	11%	18%	20%	6%	6%	8%	9%	-%	-%
Because the **service for booking taxis over the phone has improved**	13%	16%	6%						
Because it has become **easier to book taxis with apps** than it was	16%	20%	4%						
Because the **service for booking is better than it used to be**				**24%**	**27%**	19%	9%	9%	-%
I think **drivers have become less inclined to take longer routes** or **overcharge** me	10%	18%	7%	15%	16%	8%	8%	-%	11%
Because I get a **fare estimate** quoted in advance				**50%**	**50%**	**34%**	**25%**	17%	20%
I have found that **driver behaviour and knowledge has improved** in LOCATION	14%	12%	6%	14%	7%	15%	8%	4%	**28%**
Because **they were not available previously** or I did not know about them before then	3%	3%	3%	12%	20%	19%	8%	12%	12%
For **another reason**	23%	9%	27%	9%	10%	8%	37%	47%	20%

Bold figures = 25%+ of respondent group. Note small base sizes in some cases.

NOTES: Note low n values for Rest of NSW and Other Urban.
Data filtered only if used taxi in past 6 months pre-Nov 2017

Why have you used taxis to get around more?

Sydney	Nov-13	Feb-14	Nov-14	Feb-15	Nov-15	Feb-16	Nov-16	Feb-17	Nov-17	Nov-18	Nov-19
Sample size	*335*	*292*	*333*	*302*	*351*	*323*	*296*	*305*	*122*	*177*	*151*
I find them less expensive	8%	11%	12%	10%	17%	**23%**	18%	17%	13%	15%	**22%**
I have more disposable income	19%	16%	16%	14%	**21%**	22%	17%	14%	14%	12%	17%
I'm going out more	**39%**	**43%**	**40%**	**39%**	**38%**	**37%**	**41%**	**32%**	**31%**	**29%**	**20%**
Don't have to wait as long to catch a taxi, or I think more likely to turn up after I have booked it	18%	18%	17%	17%	20%	20%	**27%**	**23%**	14%	19%	**19%**
Less access to alternatives when needed	**31%**	**27%**	**27%**	**25%**	**30%**	**29%**	**24%**	**23%**	11%	11%	11%
The service for booking taxis over the phone has improved	11%	14%	15%	10%	15%	13%	21%	13%	11%	**25%**	13%
Because it has become easier to book taxis with apps	13%	15%	18%	11%	14%	17%	22%	12%	**16%**	15%	16%
I think drivers have become less inclined to take longer routes or overcharge me	10%	8%	6%	5%	6%	9%	8%	8%	9%	10%	10%
I have found that driver behaviour and knowledge has improved in [Area}	8%	10%	6%	7%	8%	11%	10%	8%	15%	9%	14%
Because they were not available previously / did not know about them before									1%	5%	3%
For another reason	**33%**	**24%**	**26%**	**27%**	20%	19%	16%	17%	**29%**	**31%**	**23%**

	Other Urban						Rest of NSW					
	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19
Sample size	*51*	*54*	*45*	*20*	*24*	*33*	*27*	*29*	*26*	*31*	*34*	*31*
Less expensive	14%	7%	13%	**20%**	10%	**28%**	4%	7%	15%	6%	**16%**	13%
More disposable income	14%	13%	16%	10%	2%	15%	4%	10%	15%	10%	8%	**17%**
I'm going out more	**37%**	**20%**	**29%**	**30%**	**29%**	**37%**	**37%**	**41%**	**42%**	**39%**	**21%**	**25%**
Don't have to wait as long	18%	17%	18%	10%	**24%**	**25%**	7%	21%	15%	0%	-%	16%
Less access to alternatives	**39%**	**33%**	**31%**	**20%**	15%	18%	**26%**	**34%**	**27%**	**23%**	11%	**20%**
Phone booking service has improved	16%	11%	13%	15%	10%	16%	7%	7%	19%	0%	2%	6%
Easier to book taxis with apps	10%	7%	4%	5%	11%	20%	11%	3%	12%	0%	10%	4%
Drivers less inclined to take longer routes	12%	0%	7%	5%	6%	18%	7%	10%	15%	0%	-%	7%
Driver behaviour and knowledge has improved	16%	7%	13%	10%	6%	13%	11%	7%	19%	0%	7%	6%
They were not available previously				0%	-%	3%				0%	-%	3%
For another reason	**25%**	**37%**	**20%**	**30%**	**38%**	9%	**41%**	24%	**42%**	**45%**	**40%**	**27%**

Bold figures show the top 3 responses for each survey

Reasons for **using types of transport services *less*** in the last 12 months tend to show a similar overall story, albeit that they are not exactly the opposite. The patterns here are very stable from 2017 and 2018 through to the current year.

Taxis are used less most commonly for cost reasons – feeling more expensive. In Sydney, and to a lesser extent other urban areas, replacement of taxis with rideshare is also clearly seen; while outside of Sydney declining primary demand due to better access to a car and going out less / less need to get around has reduced taxi usage for some respondents. This pattern is very similar to both the 2017 and 2018 patterns of results.

Relatively few respondents have declined in their use of rideshare, but where this had happened in Sydney (the only location with a sufficient sample to really consider), this was more due to less need and greater availability of other options rather than due to competitive perceptions.

Cost, need and access to options are the primary reasons mentioned by those using limousines and other hire cars las than in the previous 12 months.

Figure 11: Reasons for using transport services less in the last 12 months Q19

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution

Reasons why transport services have been used **less** in the last 12 months	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base *= used service less in the last 12 months*	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*638*	*140*	*99*	*189*	*38*	*27*	*316*	*79*	*59*
I find them **more expensive** than before	**50%**	**46%**	**39%**	16%	11%	27%	**29%**	**28%**	19%
I have **less disposable income**	10%	17%	14%	17%	**27%**	9%	18%	17%	13%
Because **peak or surge pricing** makes them too expensive	17%	13%	13%	15%	9%	15%	6%	10%	6%
I'm **going out less** / have less need to get around	18%	**26%**	**34%**	**28%**	**49%**	21%	18%	20%	22%
Because I find I **have to wait longer** than I used to catch a one, or I **can't rely on one turning up** after I have booked it	21%	17%	5%	10%	5%	9%	3%	2%	3%
I have **better access to a car**	17%	**27%**	**36%**	**31%**	**41%**	**30%**	17%	23%	**30%**
Public transport has improved when I need it	22%	14%	6%	**25%**	9%	-%	15%	16%	2%
I **use taxis** instead				15%	8%	8%	13%	11%	13%
I **use limousine or other hire vehicle services** instead	3%	3%	-%	3%	-%	5%			
I **use rideshare** services instead	**44%**	**32%**	12%				16%	13%	9%
I **use car share, community transport or courtesy buses** instead	3%	4%	1%	2%	7%	4%	3%	5%	4%
Because **booking services have become worse**	7%	6%	3%	2%	-%	13%	1%	4%	4%
I think **drivers have become more inclined to take longer routes** or **overcharge** me	16%	8%	5%	8%	-%	-%	3%	1%	-%
I have found that **driver behaviour and knowledge has become worse** in LOCATION	19%	5%	3%	11%	5%	-%	3%	-%	-%
For **another reason**	11%	9%	11%	14%	10%	-%	20%	25%	23%

Bold figures = 25%+ of respondent group. Note small base sizes in some cases.

NOTES: Note low n values for Rest of NSW and Other Urban.
Data filtered only if used taxi in past 6 months pre-Nov 2017

Why have you used taxis to get around less

Sydney	Nov-13	Feb-14	Nov-14	Feb-15	Nov-15	Feb-16	Nov-16	Feb-17	Nov-17	Nov-18	Nov-19
Sample size	*308*	*344*	*367*	*321*	*367*	*325*	*394*	*379*	*312*	*697*	*638*
I find them more expensive than before	**59%**	**51%**	**50%**	**54%**	**53%**	**60%**	**53%**	**60%**	**46%**	**47%**	**50%**
I have less disposable income	**29%**	22%	22%	22%	21%	23%	17%	13%	8%	11%	10%
Because peak or surge pricing makes them too expensive									11%	13%	17%
I'm going out less / have less need to get around	**36%**	**34%**	**32%**	**37%**	**35%**	**32%**	**28%**	**29%**	13%	19%	18%
Have to wait longer / unreliable bookings	17%	13%	16%	16%	14%	18%	22%	26%	23%	**25%**	**21%**
I have better access to a car	27%	17%	**27%**	20%	22%	17%	16%	23%	13%	19%	17%
Public transport has improved	22%	**23%**	25%	**26%**	**23%**	**24%**	23%	21%	17%	23%	22%
Use limousine/other hire vehicle									3%	6%	3%
Use rideshare					16%	22%	**31%**	**39%**	**50%**	**41%**	**44%**
Use car share, community transport or courtesy buses					13%	16%	6%	5%	4%	3%	3%
Because booking services have become worse	6%	6%	6%	5%	4%	5%	7%	7%	8%	8%	7%
Drivers more inclined to take longer routes/overcharge	21%	17%	16%	16%	18%	16%	16%	19%	20%	21%	16%
Driver behaviour/ knowledge worse	26%	13%	16%	13%	14%	14%	16%	19%	**27%**	24%	19%
For another reason	7%	14%	11%	9%	7%	6%	8%	4%	10%	9%	11%

	Other Urban						Rest of NSW					
	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19
Sample size	*46*	*62*	*54*	*41*	*131*	*140*	*29*	*22*	*17*	*27*	*82*	*99*
More expensive	**39%**	**48%**	**43%**	**56%**	**41%**	**46%**	**34%**	**41%**	**47%**	**63%**	**41%**	**39%**
Less disposable income	**35%**	27%	26%	17%	16%	18%	24%	**32%**	18%	26%	14%	14%
Peak or surge pricing makes them too expensive				**27%**	11%	13%				19%	8%	13%
I'm going out less	**43%**	**34%**	**43%**	**27%**	**23%**	**26%**	**45%**	**36%**	**59%**	**44%**	**28%**	**34%**
Wait/unreliable	11%	16%	19%	17%	22%	17%	3%	5%	6%	22%	12%	5%
I have better access to a car	20%	**34%**	**39%**	20%	31%	28%	**48%**	27%	**35%**	15%	**45%**	**36%**
Public transport has improved	11%	10%	15%	10%	16%	14%	3%	5%	6%	15%	5%	6%
Use limousine/other hire vehicle				7%	3%	3%				0%	2%	-%
Use rideshare		5%	19%	**29%**	**23%**	**32%**		0%	0%	**33%**	9%	12%
Use car share, community transport or courtesy buses		10%	4%	7%	4%	4%		14%	6%	4%	4%	1%
Booking services worse	2%	6%	7%	20%	9%	6%	3%	0%	0%	15%	7%	3%
Drivers more inclined to take longer routes/overcharge	9%	8%	13%	22%	16%	8%	7%	0%	6%	15%	9%	5%
Driver behaviour/ knowledge worse	7%	5%	9%	24%	13%	5%	3%	0%	18%	11%	5%	3%
For another reason	7%	3%	6%	15%	7%	9%	3%	9%	18%	4%	9%	11%

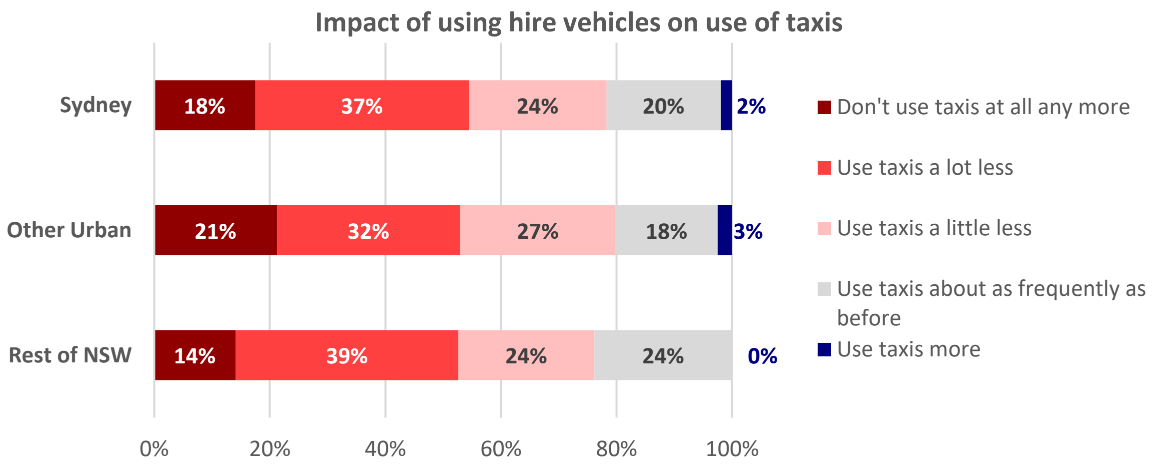
Bold figures show the top 3 responses for each survey

Impact of using hire vehicles in the last 6 months

Given the ongoing trend for a nett decline in the use of taxis and a nett increase in the use of rideshare, it is not surprising that the reported impact of hire vehicles[1] has been to reduce the usage of taxis. The chart below is based on respondents who have *ever* used taxis and who have also used rideshare in their location in the last 6 months.

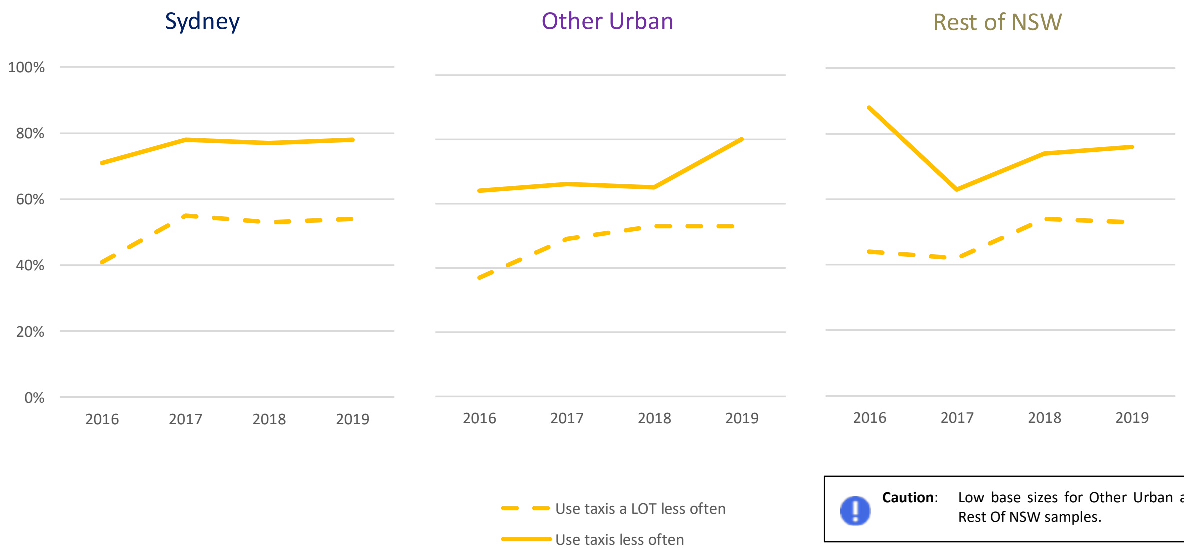
It shows that across the three locations around 1-in-5 now no longer use taxis at all, and that more than three-quarters report at least some level of decline in their taxi usage *as a result of* using hire vehicles. While the exact magnitudes vary somewhat, the general pattern of the results observed is quite consistent across locations. The tracking charts for Sydney, with the larger sample size and more mature marketplace, do show a flattening of change over the last period.

Figure 12: Reported Impact of using hire vehicles on the use of taxis amongst users of both services Q17



Base = Used hire vehicles in the last 6 months and ever used taxis [Sydney n=1073; Other Urban n=163; Rest of NSW n=76]

Figure 13: Changes in reported Impact of using hire vehicles on the use of taxis amongst users of both services Q17



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

[1] Could be *rideshare* and / or *limousines and other hire vehicles*

Problems

Failed Trips

Of those aware of the services operating in their area

Small but noticeable minorities of respondents in each location continue to have 'failed' trips within the last 6 months - where they had tried to use forms of transport and not been able to. Unsurprisingly given their relative usage, this is less common for limousines and other hire vehicles than it is for taxis and rideshare, where the proportions are approximately comparable.

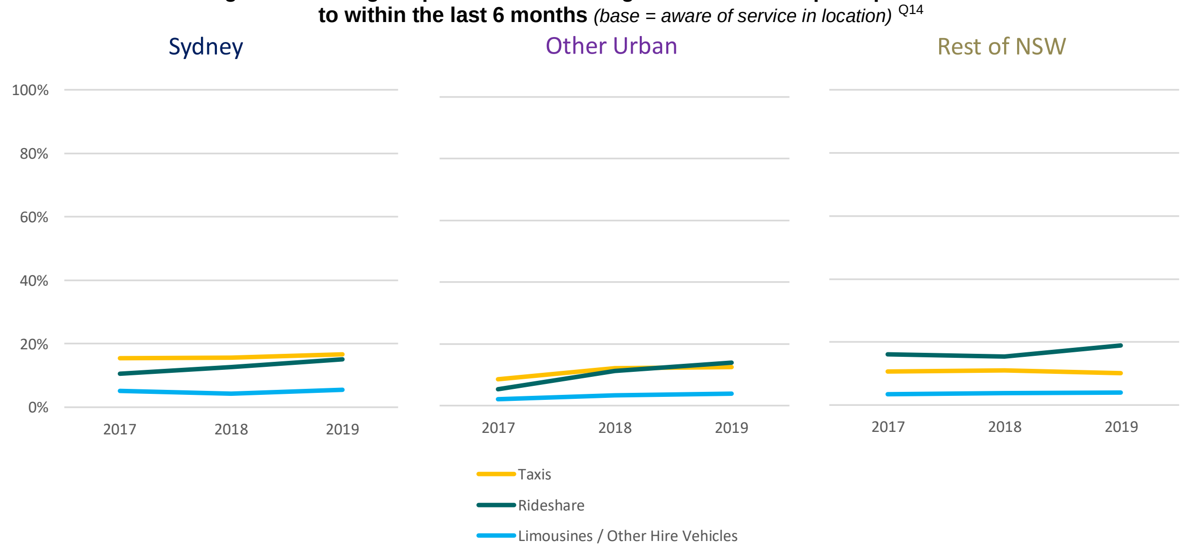
In Sydney a failed trip was slightly more likely to have happened for taxis than rideshare (17% cf 15% of respondents aware of the existence of the services), while in the rest of NSW this pattern was reversed (10% cf 19%). In other urban areas, the proportions were about equal (13% and 14%).

Both patterns and volumes of failed trips reported in the 2019 survey are consistent with 2018.

Figure 14: Prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14

Base = Aware of services [Sydney n=1626-2040; Other Urban n=396-495; Rest of NSW n=197-415]

Figure 15: Change in prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14



<u>All respondents</u>

Figure 16: Prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location AND all respondents)* Q14

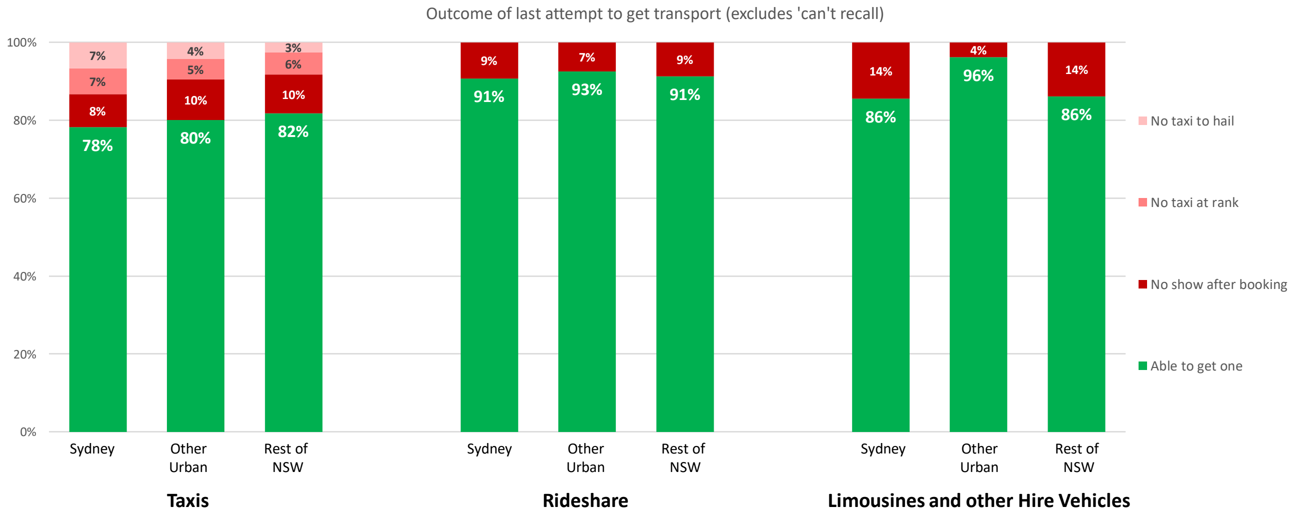
% experienced a failed trip in last 6 months		Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
		Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
% of those aware of service in location	**2019**	**17%**	**13%**	**10%**	**15%**	**14%**	**19%**	**6%**	**4%**	**4%**
	Sample size	*2040*	*495*	*415*	*1968*	*420*	*197*	*1626*	*396*	*227*
	2018	16%	12%	11%	13%	11%	15%	4%	3%	4%
	Sample size	*2104*	*523*	*438*	*2015*	*409*	*205*	*1784*	*432*	*247*
*(Base = **aware** of service)*	**2017**	15%	9%	11%	11%	5%	16%	5%	2%	3%
	Sample size	*2009*	*487*	*415*	*1825*	*297*	*131*	*1686*	*374*	*202*
% of all respondents	**2019**	**16%**	**12%**	**9%**	**14%**	**11%**	**8%**	**4%**	**3%**	**2%**
	Sample size	*2095*	*522*	*446*	*2095*	*522*	*446*	*2095*	*522*	*446*
	2018	15%	12%	10%	12%	9%	7%	4%	3%	2%
	Sample size	*2147*	*533*	*478*	*2147*	*533*	*478*	*2147*	*533*	*478*
	2017	15%	8%	10%	9%	3%	5%	4%	2%	2%
	Sample size	*2048*	*501*	*453*	*2048*	*501*	*453*	*2048*	*501*	*453*

Regardless of whether looking at people aware of services in their location (top section of Figure 16) or the total population (bottom section), it can be seen that in both Sydney and Other Urban areas, the proportion of people experiencing failed trips with rideshare services is closing in on the rate for taxis. In the Rest of NSW overall fail rates for rideshare are lower than for taxis, but higher amongst those people who are aware of the services being available.

Outcome of last attempt

On the very last occasion respondents tried to use point-to-point transport, the majority were successful. However, small minorities experience difficulties in getting transport. Despite the population figures closing between taxis and rideshare, last trip difficulties remain more common for taxis than for either of the other services, but perhaps mostly because there are more ways for taxi trips to be problematic due to the variety of ways they can be sourced.

Figure 17: Outcome of last attempt to obtain transport among users who could recall the outcome *(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses)* Q30



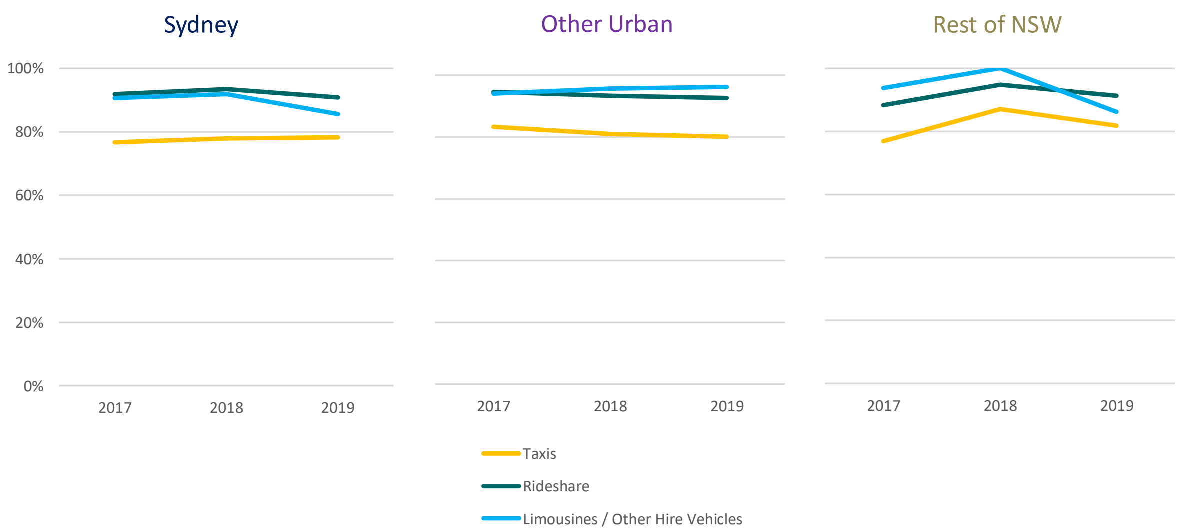
Base = Used services in the last 12 months, excludes 'can't recall outcome' responses [Sydney n=311-1212; Other Urban n=78-231; Rest of NSW n=36-192]

Taxis had the lowest success rate, ranging from 78% to 82% across locations, and as was seen in previous years, the proportions who reported failing to get a taxi by rank, hail and booking were similar, though highest for attempted bookings. The success rate for rideshare was 91%-93%, and for limousines and other hire vehicles it was 86%-96%.

Rank and hail difficulties are peculiar to taxis, but failure to show after booking is a failure common to all services. When isolated in this way, rideshare had a post-booking failure rate of 7%-9%, and taxis a similar failure rate of 8%-10% across locations. This pattern continues to show the failure rate of rideshare, much like the usage rate, stabilising at about the equivalent rates to taxis.

The tracking chart below shows just the overall success / failure rates. It shows that after rest of NSW respondents reported generally higher success rates on their last attempt in 2018 compared to 2017, this pattern then reversed in 2019. In Sydney and Other Urban areas, the overall success rates for both taxis and rideshare have not changed substantially in this time, but the slow trends discussed above are visible as small effects in the larger patterns.

Figure 18: Change in success rate for last attempt among users who could recall the outcome
(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses) Q30



Actions when unable to get transport

Only rarely when a respondent was last unable to get their preferred form of transport did they end up not making the trip at all – with this happening 12-15% of the time when a taxi was unavailable, and 6-12% of the time when rideshare services were unable to be accessed.

In Sydney, taxis and rideshare pick up around a quarter of the cases where the other was not able to be used, with public transport and self-travel covering most other cases. Alternative solutions are fairly similar across taxis and rideshare, and if taxis and rideshare are combined then solutions are also fairly similar for those unable to get a limousine or other hire vehicle.

In other urban areas a broadly similar pattern is also seen, but predictably with slightly less alternative use of public transport options.

Figure 19: Actions taken when unable to get point-to-point transport Q15/31

NOTE: * Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution

Actions taken when last unable to get point-to-point transport *Multiple responses allowed, so columns add to more than 100%*	When last unable to get a **taxi**			When last unable to get a **rideshare service**			When last unable to get a **limousines or other hire vehicle**		
Base: Combined responses from <u>any</u> failed attempt in last 12 months (Q14/15) OR if last attempt was unsuccessful (q30/31)	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*453*	*87*	*64*	*336*	*63*	*40*	*111*	*16**	*13**
Took a **train**	**33%**	16%	15%	**39%**	**30%**	**27%**	**26%**	18%	0%
Used a **rideshare** service instead	**29%**	**25%**	10%				14%	30%	7%
Took a **regular bus**	**21%**	18%	13%	**25%**	18%	19%	18%	28%	13%
Used a **taxi** instead				**23%**	**24%**	**29%**	14%	17%	0%
Drove myself or got a lift	17%	**22%**	18%	19%	**31%**	**27%**	12%	16%	15%
Walked or **cycled**	14%	13%	16%	15%	4%	18%	11%	8%	7%
Decided **not to make the journey** at all	14%	12%	15%	12%	6%	9%	12%	11%	19%
Used **community transport**	9%	7%	7%	14%	21%	10%	15%	14%	8%
Used **courtesy transport**	8%	7%	7%	8%	13%	8%	14%	20%	0%
Used a **limousine** or other **hire vehicle**	7%	2%	3%	7%	6%	3%			
Bikeshare	6%	3%	5%	5%	6%	4%	5%	9%	0%
Used a **car sharing** service	5%	2%	4%	6%	4%	2%	7%	9%	0%
Something else	8%	9%	5%	9%	12%	12%	13%	6%	0%
Can't recall	5%	5%	5%	9%	7%	6%	13%	14%	16%

Bold figures = 20%+ of respondent group. Note small base sizes in some cases.

The longer-term trends observed in the following tables show the growth of rideshare as an alternative when taxis are not available. This pattern started first in Sydney, and is now becoming more apparent in other urban areas and the rest of NSW. As has been observed across the 2019 survey however, rideshare as an alternative has not grown from 2018-2019 in Sydney.

In Sydney use of public transport when taxis are not available was lower in 2018 – with use of regular buses steadily declining as an alternative, and reported use of trains also relative low compared to previous results. In the 2019 survey buses remained at the low end, but reported use of trains was consistent with previous years, suggesting the 2018 figure was an aberration or a statistical artefact. Patterns in the other urban and rest of NSW areas are harder to discern with smaller sample sizes available.

NOTES: * November 2016 asked the question as a single response and is not directly comparable with other years.
Note low n values for Rest of NSW in previous years.

On the last occasion you were unable to use a taxi, what did you do instead?

Sydney	Nov-13	Feb-14	Nov-14	Feb-15	Nov-15	Feb-16	Nov-16	Feb-17	Nov-17	Nov-18	Nov-19
Sample size	*209*	*120*	*254*	*199*	*279*	*266*	*248**	*224*	*311*	*469*	*453*
Used a rideshare service instead			2%	2%	3%	8%	12%	21%	**32%**	**31%**	**29%**
Took a train	**31%**	**34%**	**36%**	**29%**	**33%**	**35%**	29%	**29%**	**35%**	**22%**	**33%**
Took a regular bus	**32%**	**26%**	**28%**	**40%**	**30%**	**27%**	17%	**25%**	**25%**	**21%**	**21%**
Drove myself or got a lift	**23%**	**22%**	**22%**	**19%**	**20%**	16%	15%	**21%**	24%	19%	17%
Walked or cycled	17%	18%	15%	14%	18%	14%	9%	9%	18%	14%	14%
Decided not to make the journey at all	12%	17%	12%	9%	13%	**18%**	8%	8%	12%	10%	14%
Used community transport	6%	2%	8%	8%	10%	7%	6%	8%	12%	9%	9%
Used a limo or other hire vehicle service	2%	3%	3%	3%	7%	7%	2%	7%	10%	7%	7%
Used a bike sharing service										6%	6%
Used courtesy transport					2%	2%	0%	2%	8%	5%	8%
Used a car sharing service			2%	1%	3%	3%	1%	3%	9%	4%	5%
Something else									8%	8%	8%
Can't recall									8%	4%	5%

	Other Urban						Rest of NSW					
	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19
Sample size	*39*	*47*	*23**	*42*	*85*	*87*	*9*	*13*	*6**	*44*	*61*	*64*
Used a rideshare service instead	0%	4%	4%	17%	**17%**	**25%**	0%	0%	0%	14%	**15%**	10%
Took a train	13%	11%	9%	24%	**17%**	16%	0%	0%	0%	14%	9%	**15%**
Took a regular bus	**28%**	**23%**	35%	**14%**	**18%**	**18%**	33%	8%	17%	9%	12%	13%
Drove myself or got a lift	**28%**	**36%**	22%	**29%**	**30%**	**22%**	33%	8%	33%	**27%**	**15%**	**18%**
Walked or cycled	21%	13%	13%	**31%**	15%	13%	22%	62%	33%	**32%**	**31%**	**16%**
Decided not to make the journey at all	**23%**	**17%**	9%	14%	9%	12%	11%	15%	17%	20%	10%	**15%**
Used community transport	8%	11%	4%	7%	3%	7%	0%	0%	0%	7%	3%	7%
Used a limo or other hire vehicle service	3%	4%	4%	10%	9%	2%	0%	0%	0%	5%	1%	3%
Used a bike sharing service					0%	3%					0%	5%
Used courtesy transport		4%	0%	5%	5%	7%		8%	0%	2%	4%	7%
Used a car sharing service	0%	0%	0%	7%	0%	2%	0%	0%	0%	5%	0%	4%
Something else				2%	4%	9%				**9%**	7%	5%
Can't recall				14%	2%	5%				14%	9%	5%

Bold figures show the top 3 responses in each survey

Problems Experienced

Respondents in Sydney have reported a higher level of problems than those in other urban or the rest of NSW in each year since 2017, particularly with respect to taxis. In all three locations taxis have tended to have the highest level of problems of the three types of transport services, and limousines and other hire vehicles the lowest. However, in 2019 the gap between taxis and rideshare was much lower, with reported problems increasing for rideshare and decreasing for taxis.

Only 40% of Sydney taxi users did not report at least one problem experienced in the last 12 months, compared to 38% in 2017 and to 35% in 2018. 49% of taxi users in Other Urban areas and 70% in the rest of NSW reported no problems. In each location, the proportion of rideshare users reporting no problems was 6-9% higher than for taxis.

Problems reported did not change dramatically from 2017 to 2018, but one point noted to monitor was an increase in the proportion of those in other urban areas who noted *peak or surge pricing* as an issue for both taxis (19%) and rideshare (21%) in 2018. In 2019 these figures fell back slightly to 16% and 14% respectively, suggesting that peak / surge pricing was a smaller issue for users.

No respondents identified serious inappropriate or illegal actions in 2018 or 2019.

Figure 20: Problems experienced using point-to-point transport amongst users Q28/29

NOTE: Small bases sizes for Rest of NSW.

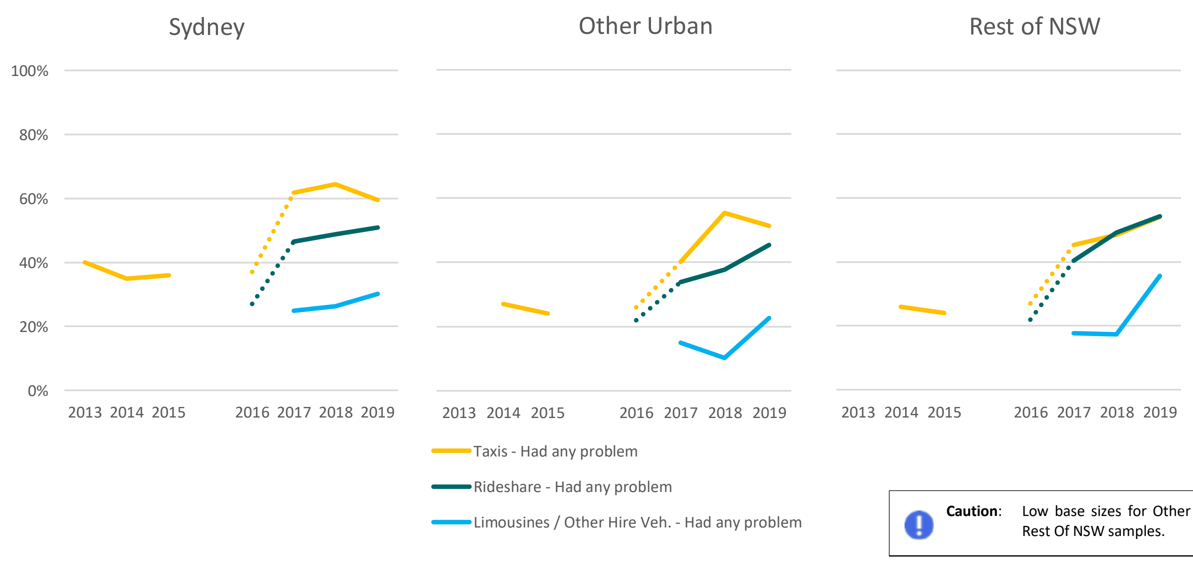
Problems experienced using point-to-point transport *Multiple responses allowed, so columns add to more than 100%*	Using **Taxis**			Using **Rideshare services**			Using **Limousines or other hire vehicle services**		
Base: Used the type of transport in the last 12 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*1325*	*252*	*203*	*1251*	*201*	*89*	*358*	*86*	*44*
Had **no problems**	**40%**	**49%**	**46%**	**49%**	**55%**	**46%**	**70%**	**77%**	**64%**
Driver **not know** where **going**	**20%**	10%	**15%**	12%	8%	7%	2%	3%	4%
Difficulty getting one at a **major event** New in 2018	**19%**	**23%**	**24%**	12%	11%	12%	8%	7%	10%
Not most **direct** route	**22%**	**19%**	**15%**	14%	9%	10%	5%	3%	7%
Price (during peak or surge)	**17%**	**16%**	**17%**	**18%**	14%	**16%**	7%	6%	13%
Couldn't get one when wanted some other time	**16%**	**16%**	9%	11%	**17%**	**15%**	8%	6%	4%
Overcharged	**16%**	12%	13%	9%	4%	12%	9%	5%	4%
Driver rude, unhelpful, or offensive	13%	5%	9%	5%	5%	9%	3%	4%	10%
Unsafe (driving, breaking road rules)	9%	5%	6%	7%	5%	8%	4%	3%	0%
Driver **refused destination**	8%	2%	0%	2%	0%	3%	2%	0%	5%
Driver or vehicle **condition** / **presentation**	2%	1%	0%	0%	0%	0%	0%	2%	0%
Something else	1%	2%	0%	1%	1%	1%	1%	0%	0%
Did **not show**	0%	0%	0%	0%	0%	0%	0%	0%	0%
Inappropriate or **illegal** actions (fraud, harassment etc)	0%	0%	0%	0%	0%	0%	0%	0%	0%

Bold figures = 15%+ of respondent group. Most "something else" responses were back-coded into existing categories. Note small base sizes in some cases.

The methodology behind this question was changed from the 2017 survey onwards. Previously the question asked whether the user had experienced any problems, and only then for details if they said yes. From 2017 the question presents the list of potential problems, and the proportion recorded here are those who say they had *none of these experiences*. This revised approach is more likely to result in higher reporting, as it both prompts respondents for experiences they may not spontaneously recall, and also makes clear what is meant by *'a problem'*. For this reason, the pre-2017 and post-2017 data is connected with a dotted line.

Looking just at the comparison from 2017 to 2018, across all locations there was a tendency for slightly more respondents to indicate at least some sort of problem with both taxis and with rideshare services. In 2019, the proportions of taxi users reporting problems has declined, but the proportion of rideshare users reporting problems has increased. While problems experienced with taxis remain equal to or higher than those for rideshare, the gap is substantially lower in the 2019 survey.

Figure 21: Change in experiencing ANY problem using point-to-point transport amongst users
Q28/29



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

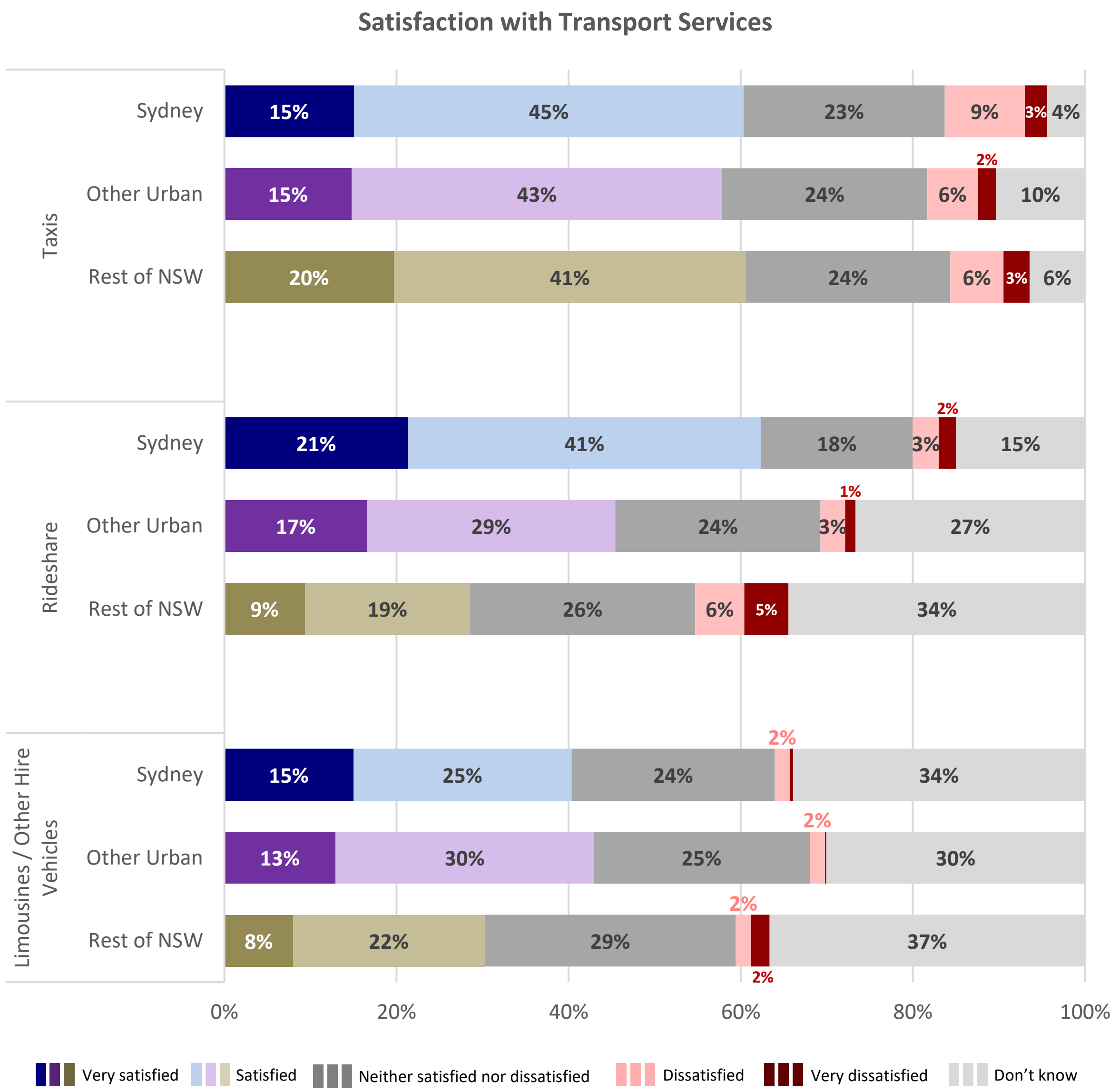
Satisfaction with Services

Satisfaction with the available taxi services remains moderately strong, and approximately equal across Sydney, other urban areas and the rest of NSW.

Satisfaction with rideshare in Sydney and the rest of NSW is on par with taxis, but lower in Other Urban areas. Satisfaction with limousine and other hire vehicle services is level with taxis and rideshare in Sydney, but lower elsewhere.

Taxis continue to have the highest proportion of respondents who say they are actively 'dissatisfied' with the service available to them in Sydney and other urban areas. However, the differential between the proportion who said they were satisfied and dissatisfied with taxis has improved from 2018, especially in Sydney and Other Urban areas.

Figure 22: Satisfaction with point-to-point transport services Q7/10



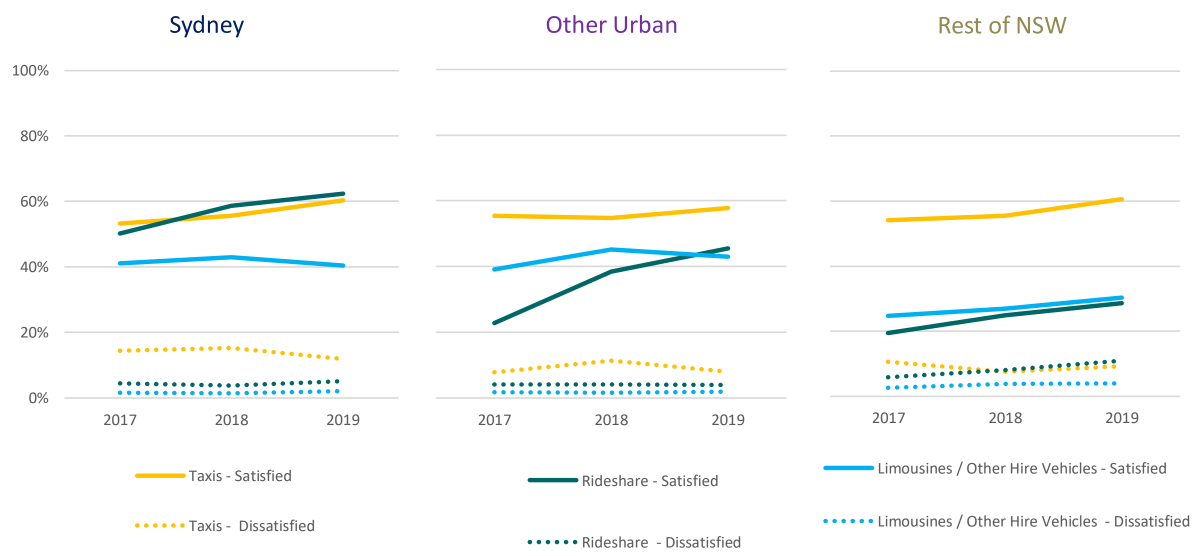
	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Satisfied	60%	58%	61%	62%	45%	29%	40%	43%	30%
Dissatisfied	12%	8%	9%	5%	4%	11%	2%	2%	4%
Differential *	+48%	+50%	+51%	+57%	+41%	+18%	+38%	+41%	+26%
Compared to 2018	*+8*	*+6*	*+3*	*+2*	*+7*	*+1*	*-4*	*-3*	*+3*

Base = All respondents [Sydney n=2095; Other Urban n=522; Rest of NSW n=446]

* Differential = % (Very satisfied + Satisfied) minus % (Very dissatisfied + Dissatisfied). The higher the differential, the better the perceived value. *Note: differentials are based on results to one decimal place, and may look different to the rounded whole numbers shown in the table*

While many of the indicators in the 2019 survey have shown a plateauing of penetration and use of rideshare services, satisfaction with rideshare has increased. At the same time, satisfaction with taxis has also increased, and active dissatisfaction has reduced slightly.

Figure 23: Change in satisfaction with point-to-point transport services Q7/10



B. Perceptions of Point-to-Point Transport Options

Strengths and Weaknesses

Customer perceptions of ten dimensions are considered in the survey, which can be classified into two broad groups:

Practical dimensions	**Quality dimensions**
Convenience	Vehicle quality
Safety	Navigation and route knowledge
Availability	Driving skills
Waiting times	Driver presentation and attitude
Value for money	Customer service

Respondents are asked to rate each dimension as a 'strength', a 'weakness' or a 'neutral characteristic of each type of transport. Over the following pages, charts show perceptions for each type of transport for each of the three locations. The charts are ordered from highest to lowest based on 2017 Sydney taxi ratings within each of the two groups. The figures reported are the 'differential' between the proportion of people who identified each dimension as a *strength* minus the proportion who identified it as a *weakness*.

There are broad consistencies in the way that taxis, rideshare and limousines / other hire vehicles are perceived across the three survey locations, but there are some nuances. Both the macro patterns and the tone of the nuances have been consistent across the three locations – suggesting that even though there has been substantial changes in the marketplace dynamics in recent years, perceptions of the characteristics and strengths of the transport services have not changed greatly.

The key consistencies seen are:

- The major positive point of difference for rideshare is felt to be *value for money*, while *convenience*, *waiting times* and *availability* are also key competitive strengths. The least positive facets are largely driver-related, being *safety*, *driving skills* and *navigation*.
- Limousines and other hire vehicles are seen as having relative strengths in terms of the 'quality' dimensions and *safety*; but they have a relative weakness in terms of *value*, and to be lower in terms of *availability*, *convenience* and *waiting times*.
- Taxis do not tend to have any clear points of differentiation as strengths, and they score particularly low for perceived *value for money*. They are the most likely to have *all* dimensions rated as a weakness. See Appendix C

These consistencies are generally in line with what was seen in 2018 (but see also the tracking chart following the individual area charts to see some macro trends over time).

Variations across the locations are described on the following pages. See appendix C for detailed charts showing strengths and weaknesses ratings.

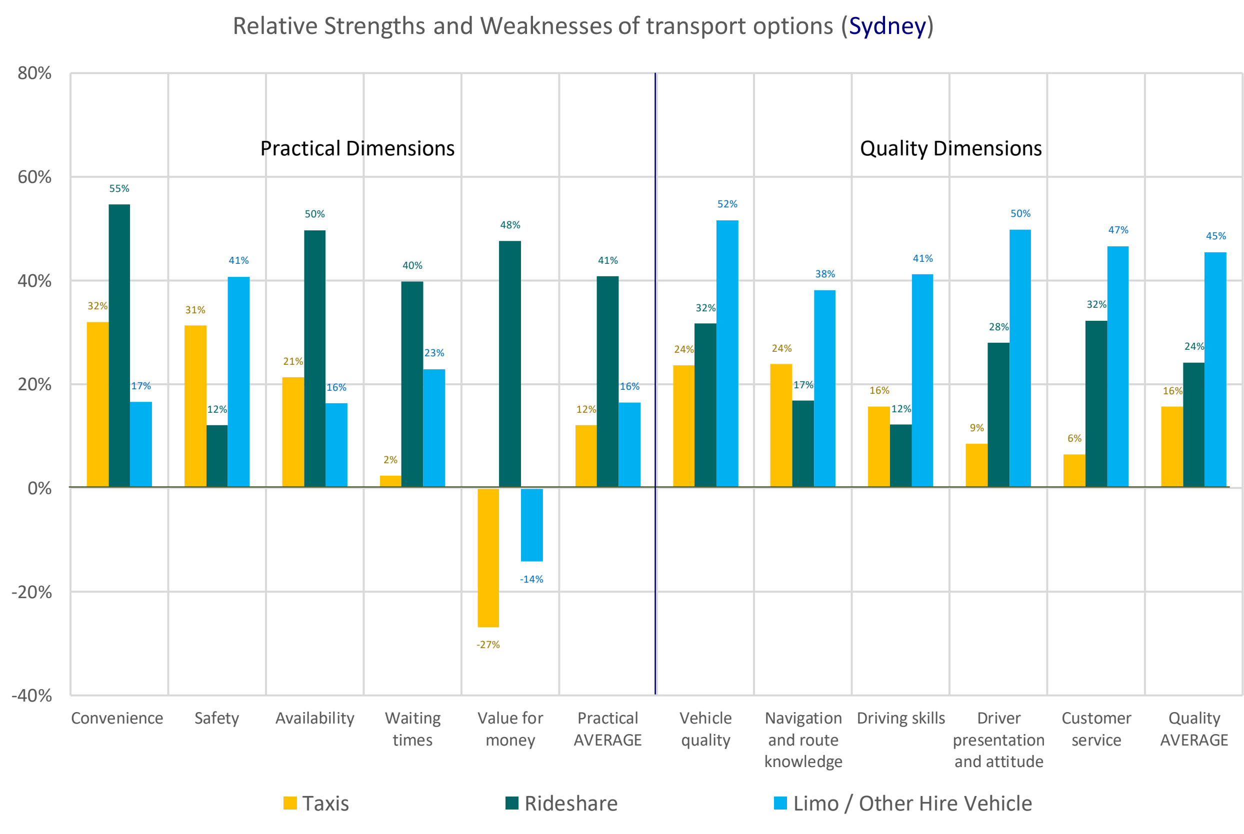
Perceptions of the three different types of services have been consistent across the three years these items have been included in the survey.

In Sydney, taxis have the lowest or equal lowest differential scores for every quality dimension, and all bar *convenience* and *safety* amongst the practical dimensions. In 2019 taxis only had a negative differential (ie: more respondents rated them as weaknesses than as strengths) for one dimension - *value*. In 2018 taxis also had small negative differentials for *waiting times* and *customer service*, but both of these were slightly positive in 2019.

Rideshare has a very strong positive differentiation on *value*, but also all other practical dimensions except for *safety.* Rideshare doesn't match limousines and other hire vehicles on the quality dimensions, but is clearly ahead of taxis for *driver presentation and attitude* and *customer service*.

Broadly, rideshare scores highest across practical dimensions (with the exception of an apparent concern about *safety*), and is particularly positively differentiated in terms of *value*. Limousines and other hire vehicles have a clear and strong position on the 'quality' dimensions.

Figure 24: Strengths and weaknesses of transport options amongst those aware of the service in their region - Sydney Q64



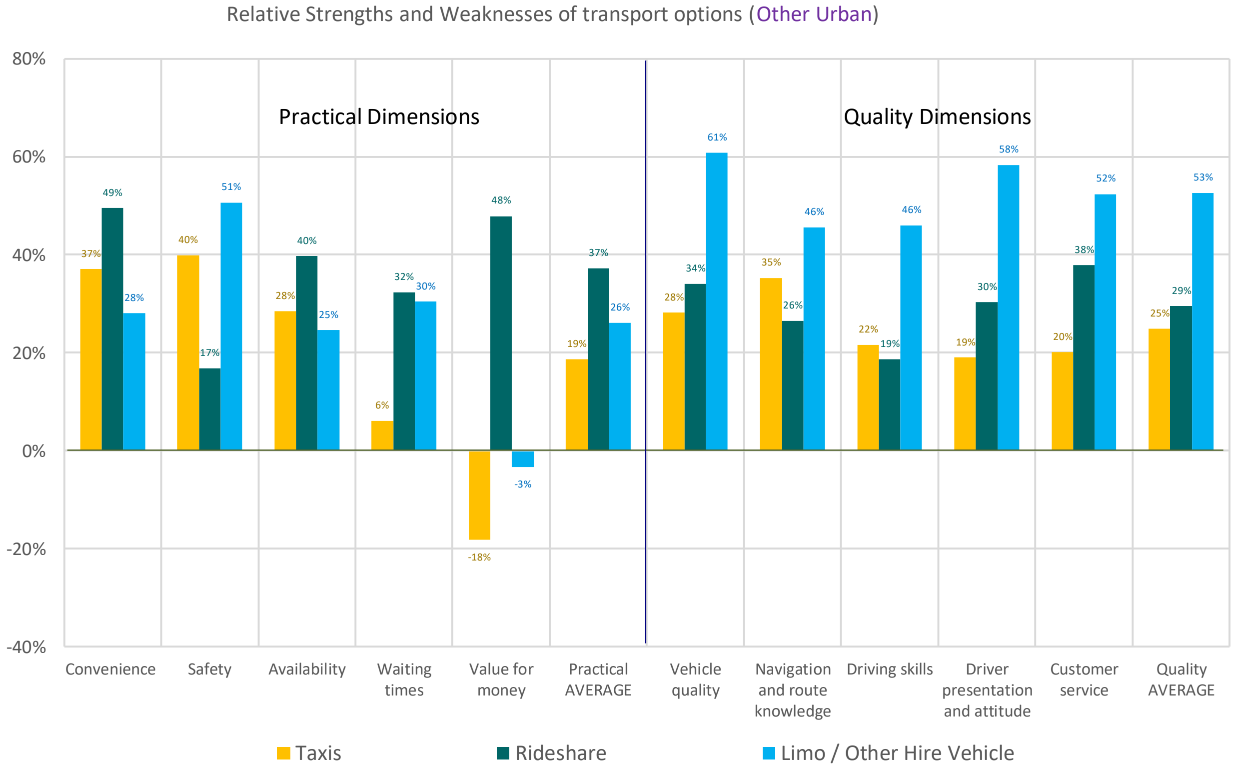
Base = Respondents aware of service in location [Taxis n=2040; Rideshare n=1968; Limo / Other n=1626]

Charts show 'differential' scores calculated as '% strength' minus '% weakness'

While there are some minor variations seen in Other Urban, overall there is a very similar macro pattern to that seen in Sydney in terms of rideshare owning *value* and limousines and other hire vehicles owning 'quality'.

The differentials between taxis and rideshare are not quite as high in other urban areas compared to Sydney, but the pattern of relativities tells effectively the same story.

Figure 25: Strengths and weaknesses of transport options amongst those aware of the service in their region - Other Urban Q64



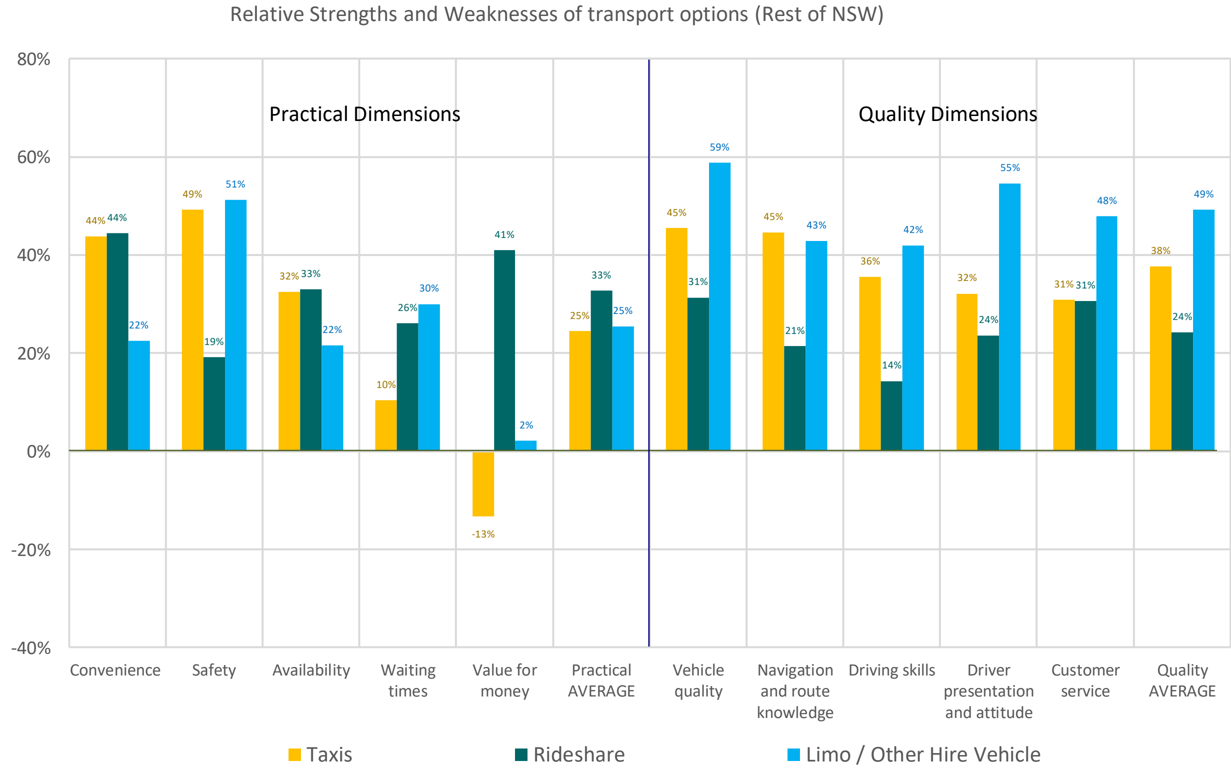
Base = Respondents aware of service in location [Taxis n=495; Rideshare n=420; Limo / Other n=396]

Charts show 'differential' scores calculated as '% strength' minus '% weakness'

In the rest of NSW though, there is a somewhat different dynamic which is evident. In these areas, taxis are viewed more similarly to limousines and other hire vehicles, and equal or ahead of rideshare on most facets other than *value* and *waiting times.*

This pattern is consistent with what has been observed in the previous surveys, and suggests that perceptions of the different transport services are not rapidly changing in these areas.

Figure 26: Strengths and weaknesses of transport options amongst those aware of the service in their region - Rest of NSW Q64



Base = Respondents aware of service in location [Taxis n=415; Rideshare n=197; Limo / Other n=227]

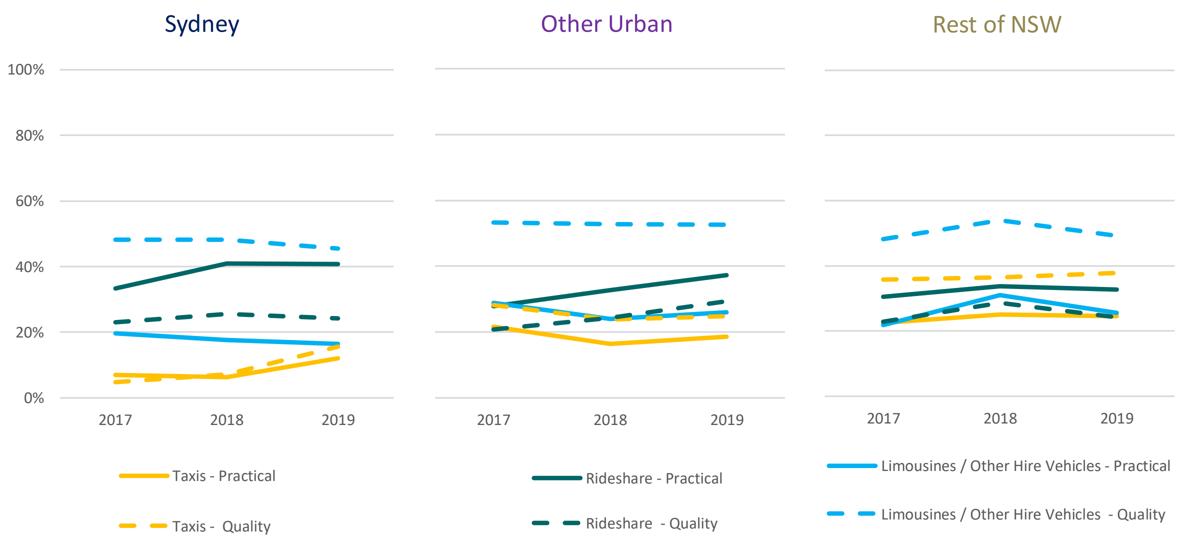
Charts show 'differential' scores calculated as '% strength' minus '% weakness'

The tracking chart below shows the average of the practical dimensions and the quality dimensions for each area.

These summaries show that in Sydney, rideshare scores substantially higher than taxis across both the practical and the quality dimensions, but that perceptions of taxis improved a little from 2018 to 2019, while rideshare remained flat. In Other Urban areas rideshare also scores higher than taxis on the practical dimensions, but they average out at close to the same point in terms of quality. In Other Urban areas perceptions of rideshare have been trending upwards, whereas taxi perceptions are slightly lower than two years ago.

In the Rest of NSW, taxis score ahead of rideshare in terms of perceived quality, but even in this location rideshare is viewed as slightly ahead of taxis in terms of practical dimensions.

Figure 27: Changes in perceived strengths and weaknesses of transport options amongst those aware of the service in their region (average Practical Dimensions and Quality Dimensions scores) Q64



Across all locations, the results suggest that perceptions of taxis were slightly stronger in 2019 compared to 12 months earlier. Perceptions of rideshare services are also slightly up over the two-year period, though not so much in the last 12 months.

Preferences

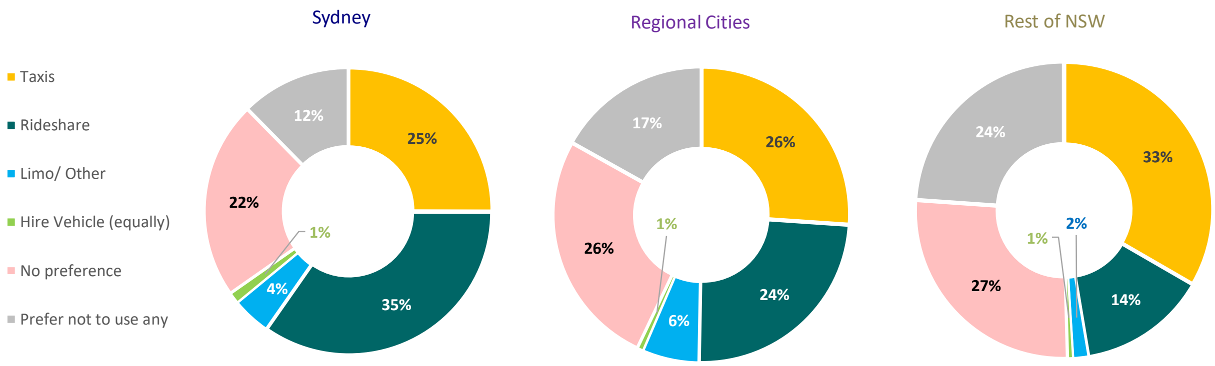
Preferred forms of transport do vary substantially across locations. In previous years the difference between Sydney and the other areas has been more stark, but preferences in Other Urban areas are transitioning to be closer to those seen in Sydney, and in the 2019 results it is now only in the Rest of NSW that preferences for taxis remain more widespread than for rideshare.

- In Sydney, substantially more respondents have a preference for some form of hire vehicle (40%, which is mostly rideshare at 35%) than for taxis (25%). This gap has grown from 6% in 2017 to the 15% figure seen in both the last two surveys. Preferences for rideshare has grown from 25% to 35% in that time.

- In Other Urban areas the proportion preferring taxis remains the same as in Sydney (26%, only -1% compared to 2017), but the proportion with a preference for hire vehicles increased from 18% in 2017 to 29% in 2018 and to 31% in the current survey. Again this change is primarily rideshare, which has gone from 9% to 24%. In 2017 there was +9% preference for taxis compared to hire vehicles, but this is now a -5% differential.

- In the rest of NSW there remains a strong preference for taxis, with 33% preferring taxis – a +17% differential to hire vehicles generally and +19% versus rideshare specifically.

Figure 28: Preferences for transport options Q65/66



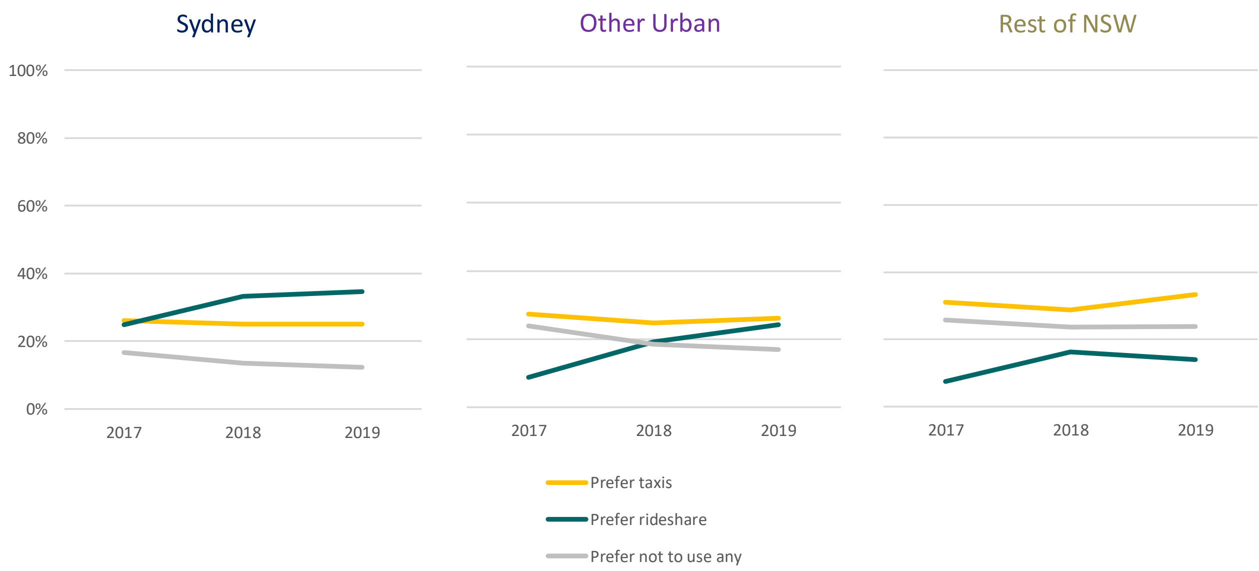
Base = All respondents [Sydney n=2095; Other Urban n=522; Rest of NSW n=446]

Preferred form of point-to-point transport	**Sydney**	**Other Urban**	**Rest of NSW**
Sample size	*2095*	*522*	*446*
Taxis	**25%**	**26%**	**33%**
Rideshare	35%	24%	14%
Limousine / Other hire vehicle	4%	6%	2%
Hire Vehicle (equally)	1%	1%	1%
Any form of Hire Vehicle	**40%**	**31%**	**16%**
No preference	22%	26%	27%
Prefer not to use any	12%	17%	24%

Consistent with other trends in awareness and usage in the 2019 survey, the tracking charts here also show preferences for rideshare increasing across all three locations over time, but that the rate of change has not been as strong in the last 12 months – especially in Sydney.

The chart here also shows those who prefer not to use *any* forms of point-to-point transport. This line has shown a slight downwards movement from 2017 to 2019. If this trend continues, it is suggestive that the collective range of point-to-point transport options available are appealing to a wider proportion of the community, with fewer having a preference to avoid point-to-point transport at all if possible.

Figure 29: Changes in preferences for transport options Q65/66

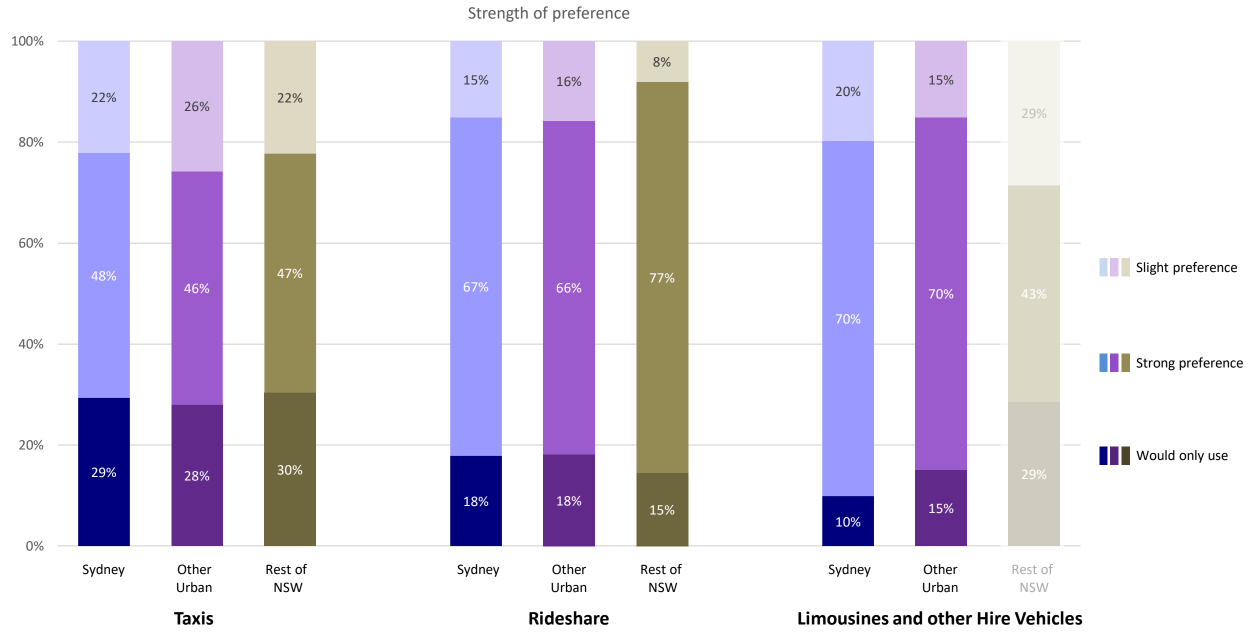


Strength of preference

There are slightly different patterns seen in the strength of preferences for taxis and rideshare, with those people who keep a preference for taxis somewhat more likely to say they *would only use their preferred type of transport* (28-30%) compared to those with a preference for rideshare (15-18%). However, those with a preference for taxis are also a little more likely to say it is only a *slight preference* (22-26% compared to 8-16% for rideshare).

Those with a preference for rideshare are most likely to characterise it as a *strong preference* (66-77%) by comparison to those with a preference for taxis (46-48%).

Figure 30: Strength of preference for transport options amongst those who have a preference for one of taxis, rideshare or limousines / other hire vehicles Q67



Base = Have preference for taxis, rideshare or limos / other HVs [Sydney n=91-726; Other Urban n=33-136; Rest of NSW n=7-148]
Note small base size for limousines / other HV in rest of NSW.

Proportion of all respondents represented in chart: Sydney = 65%; Other Urban = 57%; Rest of NSW = 49% - the balance have no preference, or prefer not to use any of these forms of transport

Changes that May Increase Use

There have been no substantive changes in the type of changes respondents felt might make them likely to use point-to-point transport services more often, across all three surveys.

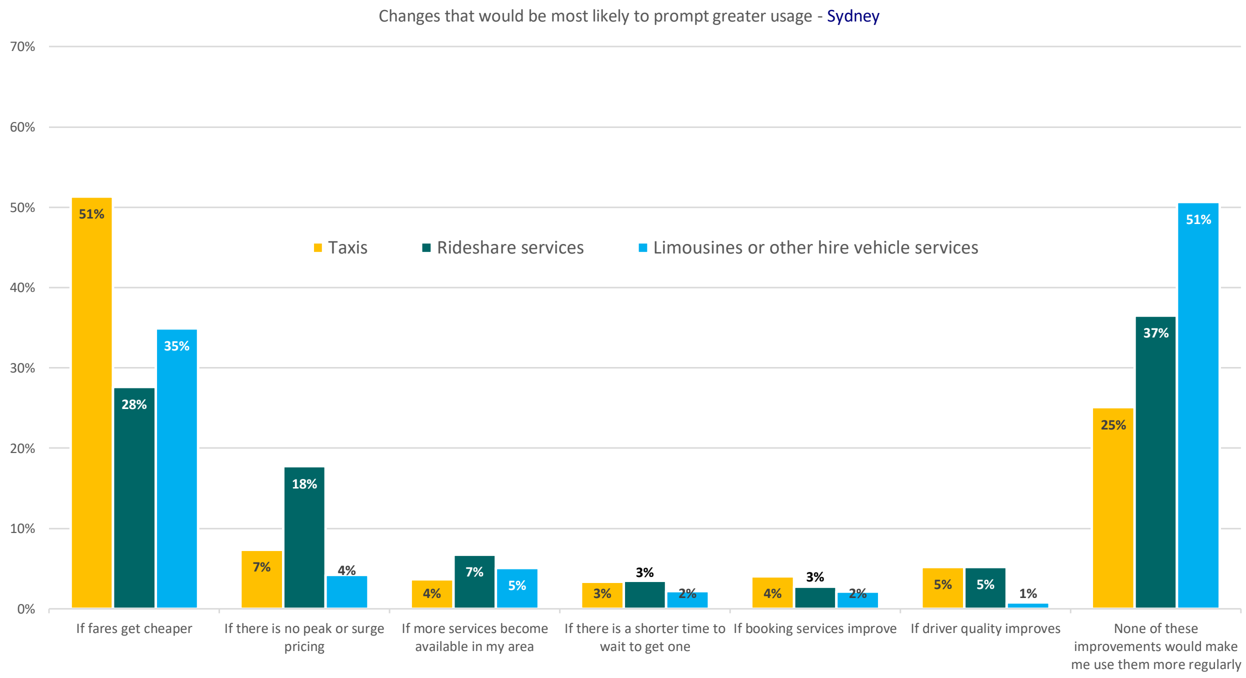
25-39% of respondents across the different regions said that nothing would get them to use taxis more often, with the equivalent figures for rideshare being 12-13% higher, and for limousines and other hire vehicles 21-26% higher. For each type of service, willingness to consider increasing usage was highest in Sydney and lowest in the Rest of NSW.

Factors relating to cost are most likely to prompt increased usage of any of the types of point-to-point transport. Cost is one of the primary dimensions on which rideshare seems differentiated from taxis across the survey, and that strongly comes through in this result too.

In all areas by far the single most commonly identified change which may prompt greater usage was *if fares get cheaper*, and this is an especially dominant and singular factor for taxis. For rideshare services *surge or peak pricing* is also identified as barrier in Sydney and Other Urban areas.

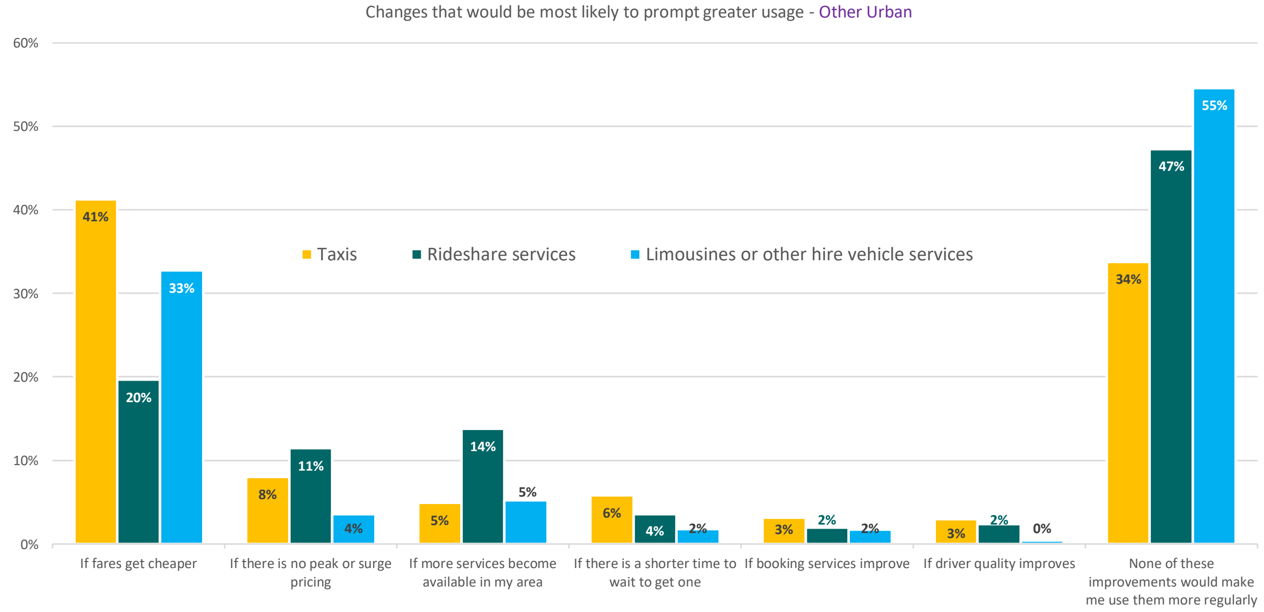
Availability of rideshare services is also a barrier in Other Urban areas and the Rest of NSW.

Figure 31: Changes which may prompt greater use of transport services – Sydney Q68



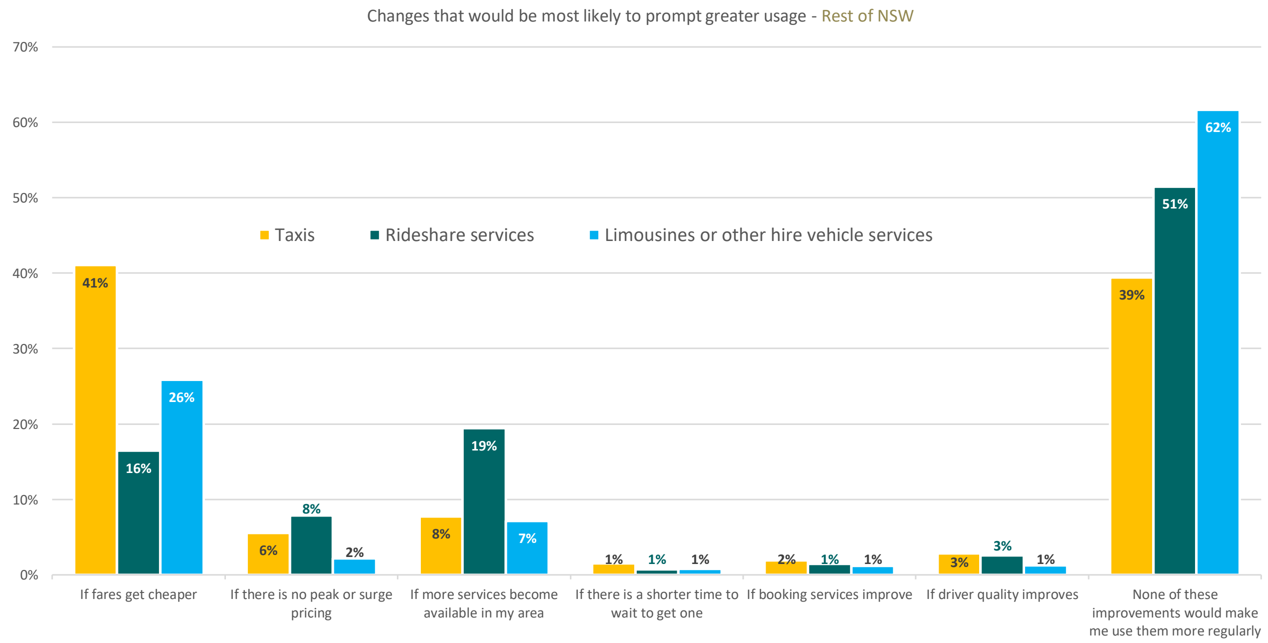
Base = All respondents [Sydney n=2095]

Figure 32: Changes which may prompt greater use of transport services – Other Urban Q68



Base = All respondents [Other Urban n=522]

Figure 33: Changes which may prompt greater use of transport services – Rest of NSW Q68



Base = All respondents [Rest of NSW n=446]

C. Perceived Value for Money

Continuing a trend seen across the previous surveys, rideshare is seen as a considerably better cost proposition by respondents. Overall, rideshare is perceived as offering the best value for money by respondents who aware of the service in their location, with limousines and other hire vehicles lowest.

In all three areas, a higher proportion of people who are aware of the services felt that rideshare services represented *good or OK value* than was the case for taxis. However, the biggest difference is that less than 10% felt that rideshare services were *poor* value, whereas around a third felt that taxis were *poor* value. Interestingly, taxis are considered the poorest value across the three areas in Sydney, while rideshare is considered the best value in Sydney.

Compared to 12 months ago, respondents in the Other Urban area were somewhat more positive about the value of both taxis and rideshare.

Figure 34: Summary of perceptions of value for money by time of trip amongst those aware of the service in their region Q20/21

		Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
		Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
	Sample size	*2040*	*496*	*415*	*1969*	*420*	*198*	*1627*	*395*	*227*
Overall	Good + OK	52%	54%	53%	71%	62%	59%	35%	42%	38%
	Poor	38%	30%	28%	7%	5%	7%	16%	16%	15%
	*Differential**	*14%*	*24%*	*25%*	*63%*	*57%*	*52%*	*19%*	*26%*	*23%*
During the day, before 10pm	Good + OK	52%	54%	52%	67%	57%	55%	34%	37%	34%
	Poor	33%	25%	24%	8%	4%	9%	15%	16%	15%
	Differential	*19%*	*29%*	*28%*	*59%*	*53%*	*46%*	*19%*	*21%*	*18%*
After 10pm - Sun to Thurs	Good + OK	38%	36%	37%	59%	48%	48%	29%	27%	30%
	Poor	39%	31%	33%	11%	9%	11%	16%	16%	17%
	Differential	*-1%*	*5%*	*4%*	*48%*	*39%*	*37%*	*13%*	*11%*	*13%*
After 10pm - Fri and Sat	Good + OK	35%	34%	34%	55%	46%	43%	28%	28%	28%
	Poor	42%	34%	36%	15%	12%	15%	17%	16%	18%
	Differential	*-6%*	*-1%*	*-2%*	*40%*	*34%*	*28%*	*12%*	*12%*	*11%*
Short trips (under 5km)	Good + OK	52%	53%	51%	66%	59%	57%	27%	24%	31%
	Poor	37%	30%	30%	10%	4%	9%	21%	18%	20%
	Differential	*15%*	*23%*	*22%*	*56%*	*55%*	*49%*	*6%*	*6%*	*11%*
Long distances (15km+)	Good + OK	41%	40%	34%	62%	52%	52%	31%	38%	33%
	Poor	46%	37%	36%	13%	7%	10%	18%	15%	17%
	Differential	*-4%*	*3%*	*-2%*	*49%*	*45%*	*42%*	*13%*	*23%*	*16%*

* Differential = % (good + OK) minus % (poor). The higher the differential, the better the perceived value.

Note: differentials are based on results to one decimal place, and may look different to the rounded whole numbers shown in the table

Cells highlighted green are >5% more positive in 2019 compared to 2018. Cells highlighted pink are >5% less positive in 2019.

In Sydney

Figure 35: Perceptions of value for money by time of trip amongst those aware of the service in their region (Sydney) Q20

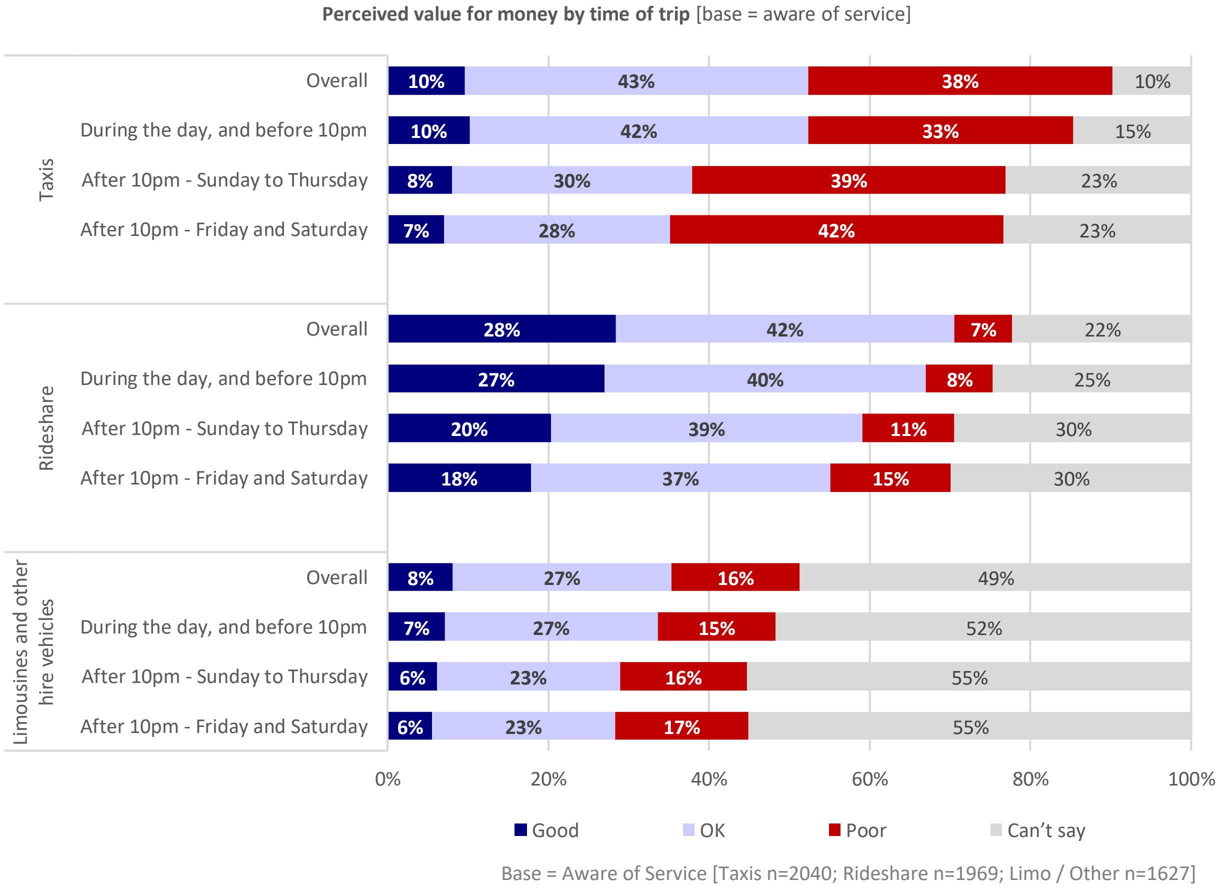
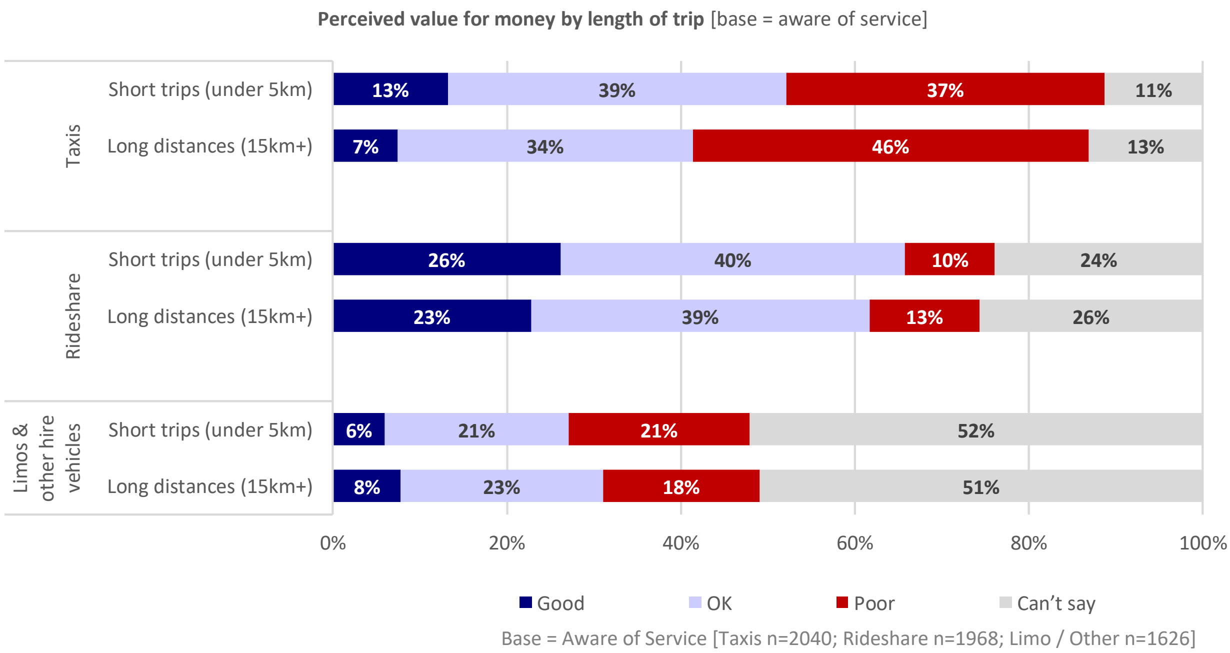


Figure 36: Perceptions of value for money by length of trip amongst those aware of the service in their region (Sydney) Q21



In Other Urban

Figure 37: Perceptions of value for money by time of trip amongst those aware of the service in their region (Other Urban) [Q20]

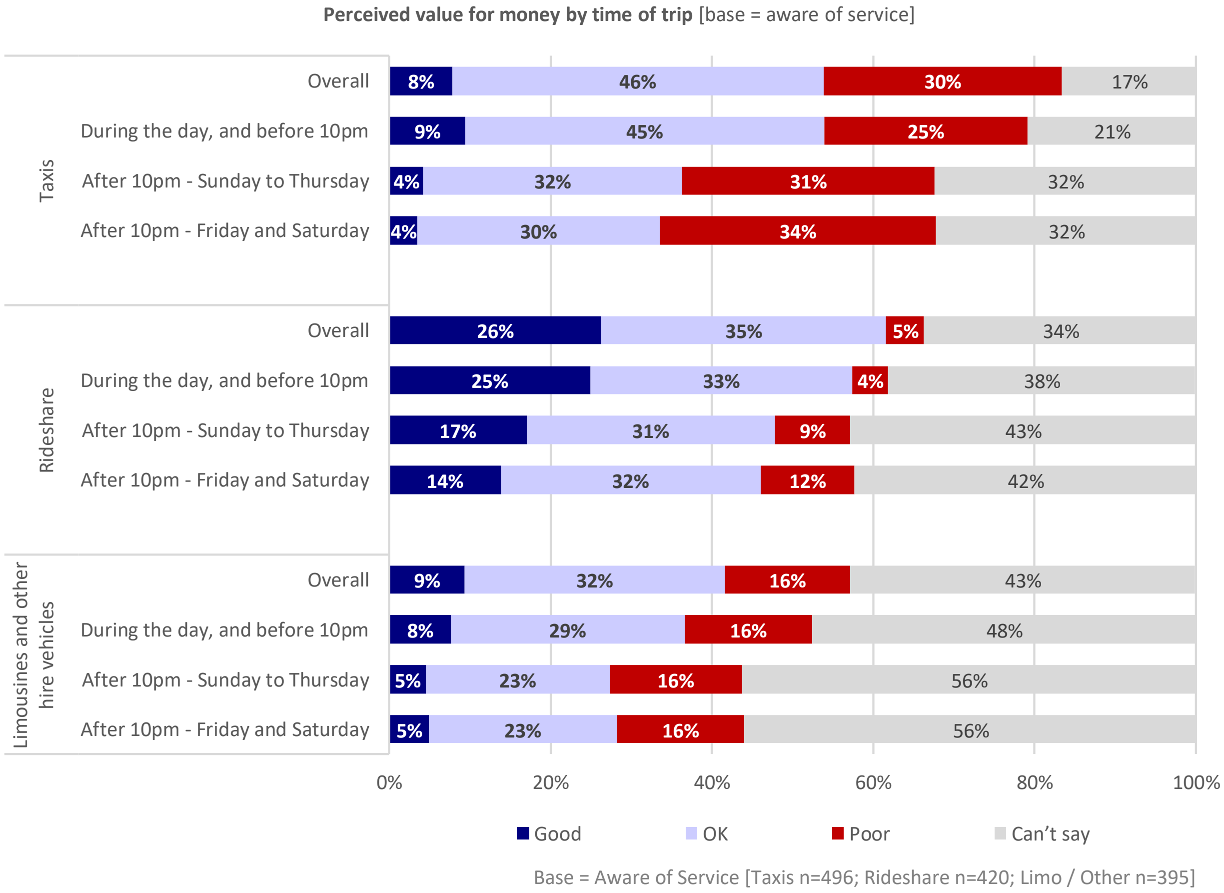
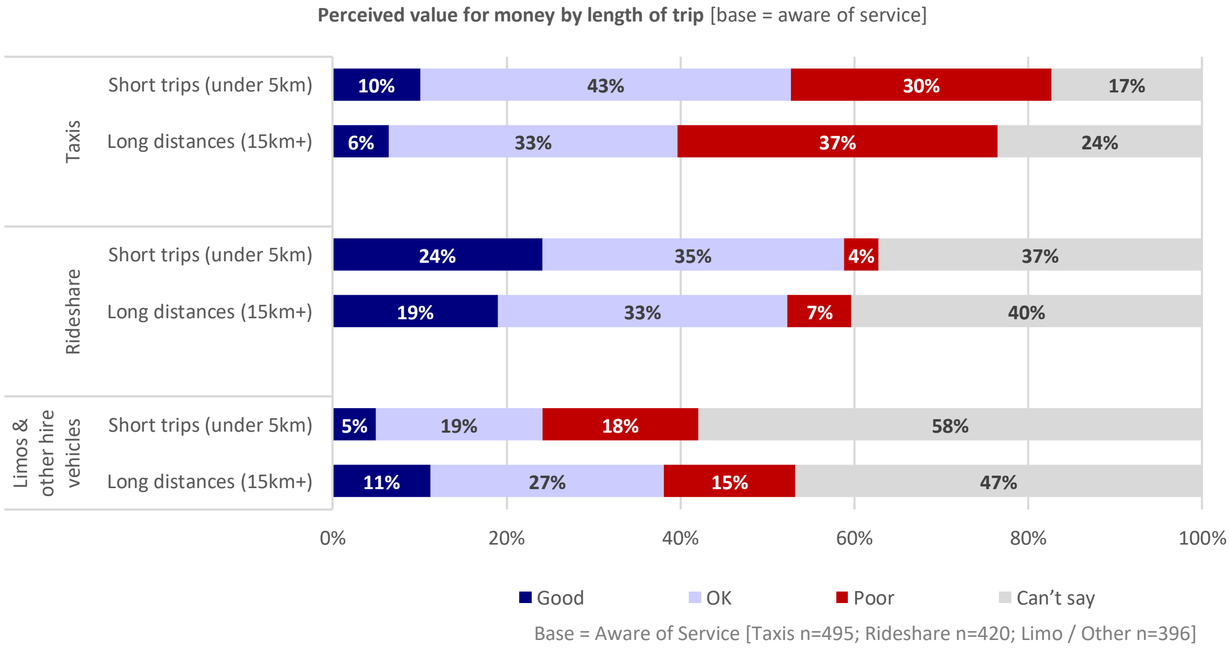


Figure 38: Perceptions of value for money by length of trip amongst those aware of the service in their region (Other Urban) [Q21]



In the Rest of NSW

Figure 39: Perceptions of value for money by time of trip amongst those aware of the service in their region (Rest of NSW) Q20

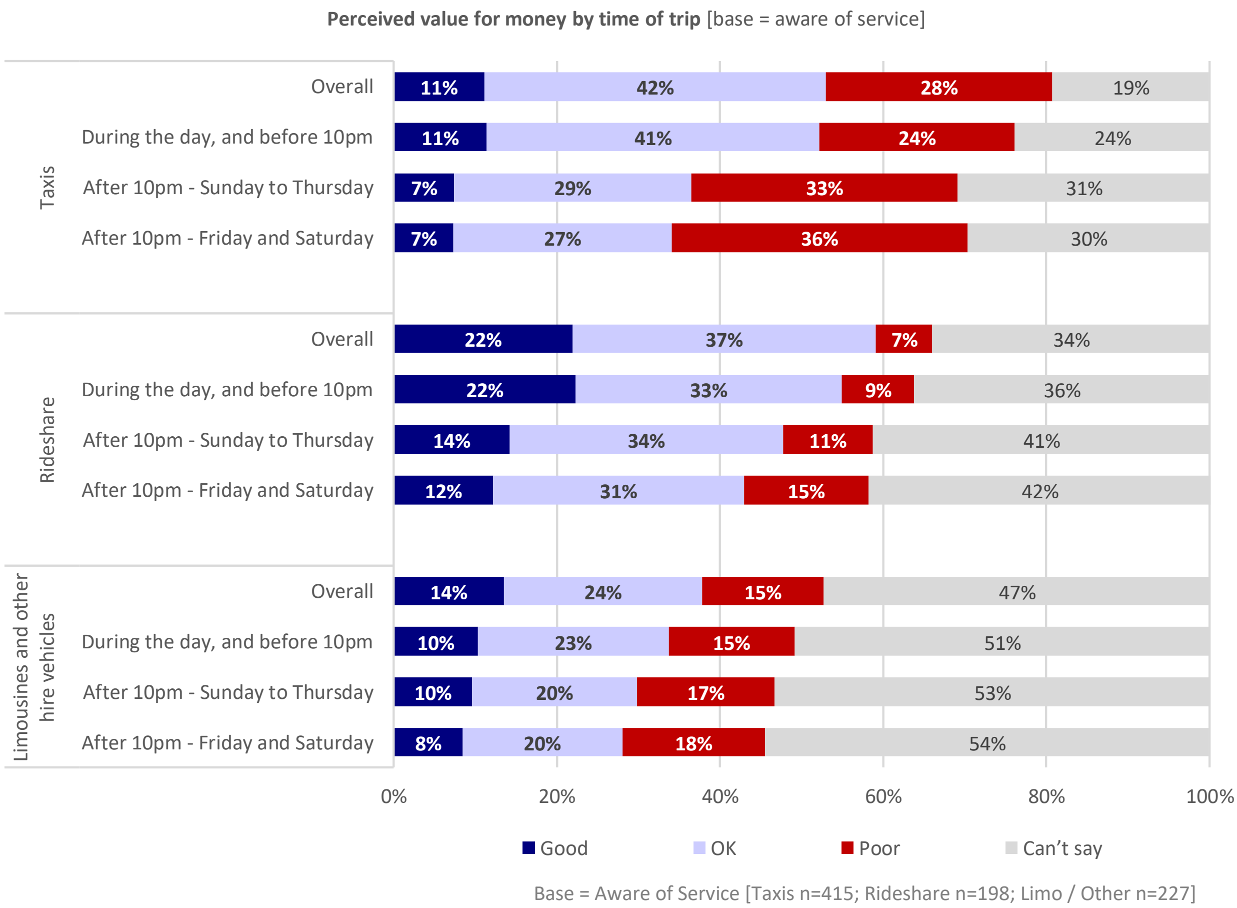
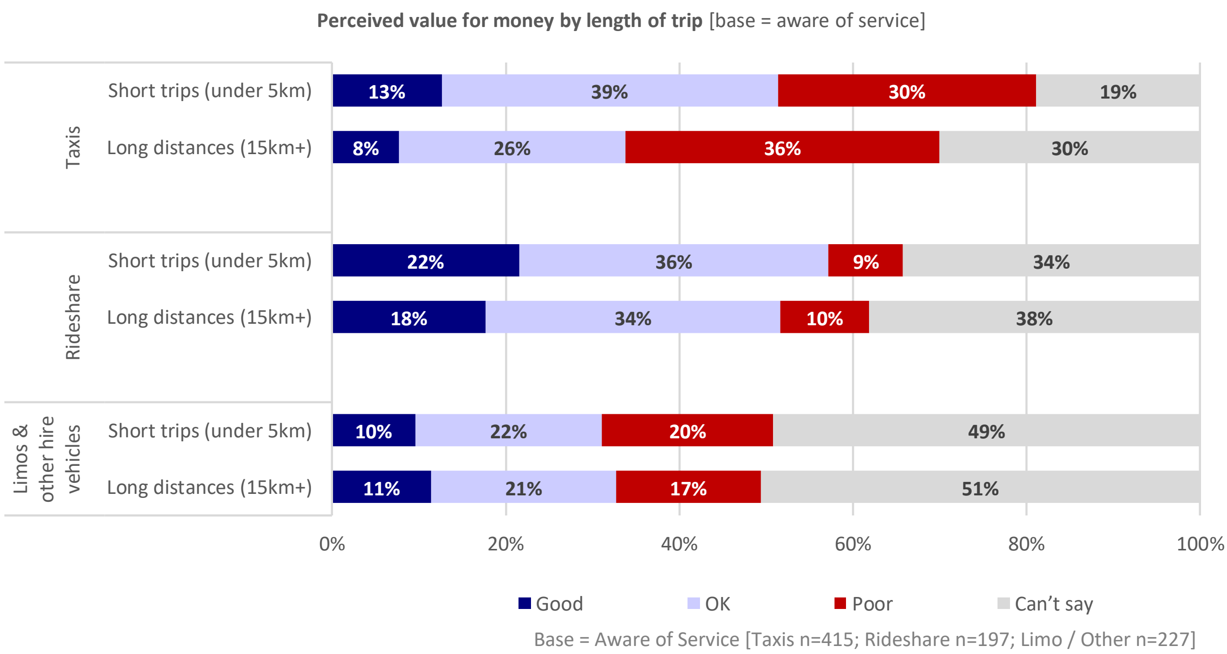


Figure 40: Perceptions of value for money by length of trip amongst those aware of the service in their region (Rest of NSW) Q21

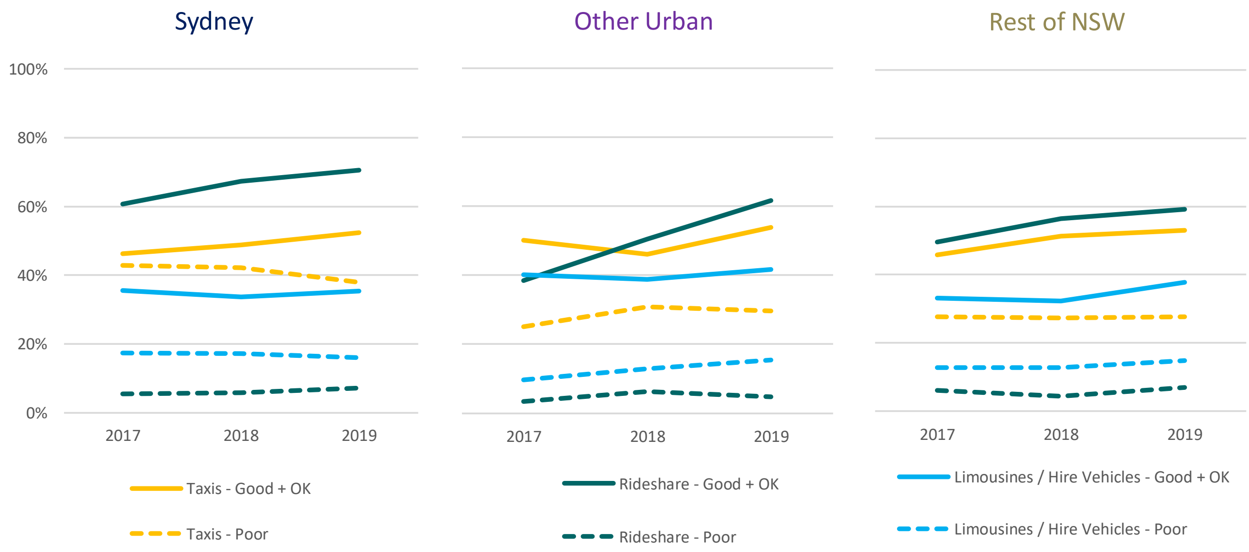


The tracking chart shows change in perceptions of overall value over time. This clearly shows the upwards perceptions of value associated with rideshare from 2017 to 2019 in the slope of the three solid dark green lines. This has been most apparent in the other urban areas, where awareness and use have also climbed the most steeply in that time.

Perceived value of taxis has also tended to increase slightly, but not to the same extent.

These tracking charts also show that the bigger difference in perceived value between rideshare and taxis lies not so much in the proportions who consider each to be good / OK value, but the higher proportions who consider taxis to be poor value.

Figure 41: Change in perceptions of OVERALL value for money amongst those aware of the service in their region Q20

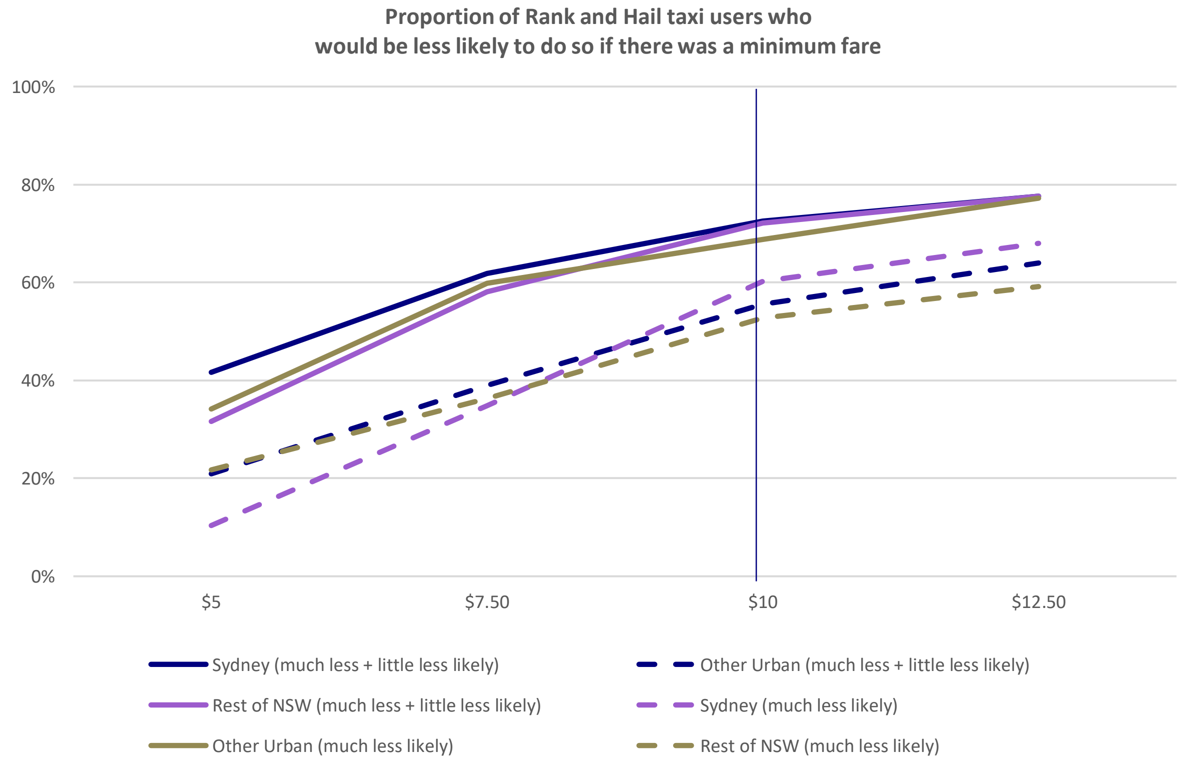


Impact of Minimum Rank & Hail Fares

Sensitivity of those who use rank and hail taxis to a minimum fare has not changed substantively across the three survey periods. The anticipated effects of minimum fares is no different across the three areas, and peaks at around 70-80% of users saying they would feel less likely to use rank and hail taxis if there was a minimum fare in the $10 - $12.50 range.

Typically survey responses about anticipated behaviour changes as a result of hypothetical scenarios should be treated indicatively rather than as a quantitative predictor of the magnitude of any change. However, the patterns can show how respondents view different levels of changes and identify sensitivities.

Figure 42: Likely impact of a minimum fare on use of Rank and Hail taxi users Q27



Base = Used or tried to use rank and hail taxis within the last 6 months [Sydney n=677; Other Urban n=90; Rest of NSW n=65]

D. Methods of Obtaining Transport Services

The patterns of ways that respondents report getting point-to-point transport services have remained reasonably stable across the 2017-18-19 surveys.

- In Sydney all four methods of obtaining taxis are still approximately equally prevalent, but outside of Sydney hailing taxis in the street is uncommon. Around a third of users report pre-booking a taxi, with ASAP bookings more common outside of Sydney.
- Rideshare services are most commonly obtained by ASAP bookings. The ratio of ASAP to pre-booked rideshare services is much the same amongst users across the three regions. At a population level, both are much more common in Sydney than in the other areas.
- Limousines and other hire vehicles are most commonly pre-booked, rather than ASAP bookings.

Figure 43: Prevalence of methods of obtaining transport in the population Q22

% of population		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	16%	11%	11%
	ASAP booked	19%	**21%**	**22%**
	Rank	22%	**16%**	13%
	Hail	21%	4%	5%
Rideshare	Pre-booked	20%	10%	5%
	ASAP booked	**39%**	**23%**	10%
Limousines and other hire vehicles	Pre-booked	**9%**	**9%**	5%
	ASAP booked	2%	1%	1%

Base = All respondents [Sydney n=2095; Other Urban n=522; Rest of NSW n=446]

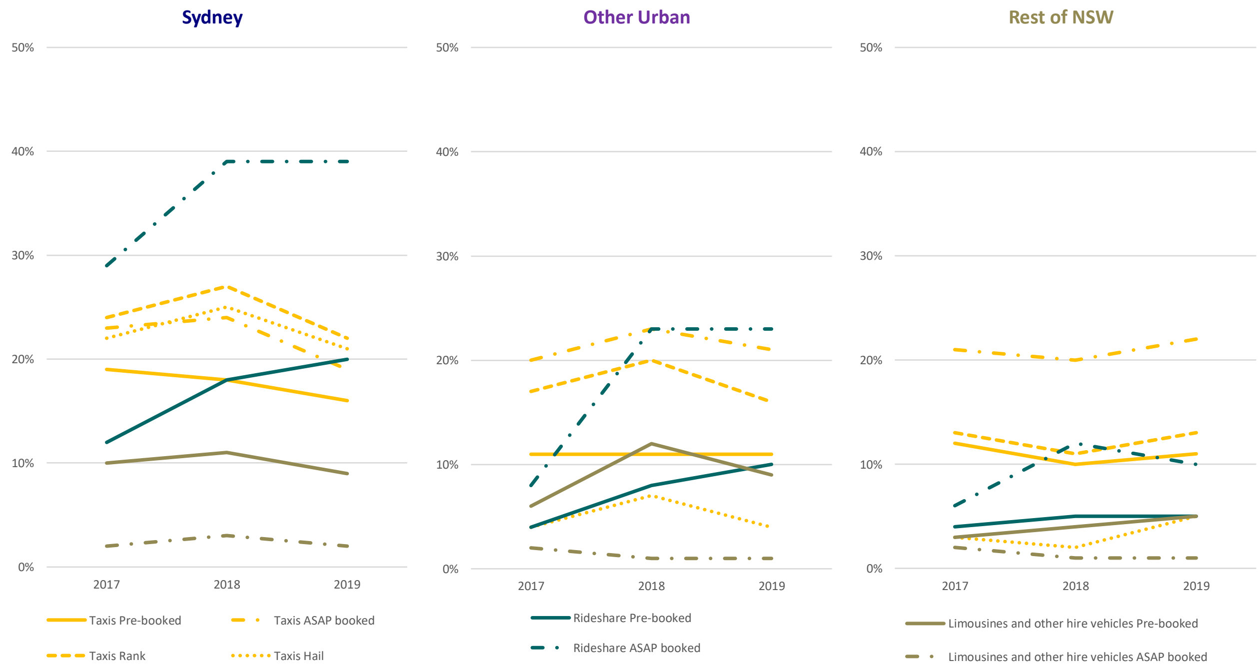
Figure 44: Prevalence of methods of obtaining transport in amongst recent users Q22

% of users (last 6 months)		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	32%	31%	33%
	ASAP booked	39%	**61%**	**64%**
	Rank	44%	**46%**	39%
	Hail	42%	13%	14%
	Sample size	*1033*	*180*	*152*
Rideshare	Pre-booked	39%	34%	34%
	ASAP booked	**77%**	**80%**	**74%**
	Sample size	*1065*	*152*	*62*
Limousines and other hire vehicles	Pre-booked	**83%**	**89%**	86%
	ASAP booked	23%	11%	18%
	Sample size	*214*	*51*	*25*

Base = Used transport type within the last 6 months

The tracking chart here shows the changes in the prevalence of each of these different methods of obtaining point-to-point transport in the population. What is most apparent in these charts is the increase in rideshare penetration, but also that in the last 12 months this increase has been to a much smaller extent.

Figure 45: Changes in prevalence of methods of obtaining transport in the population Q22



Waiting Times

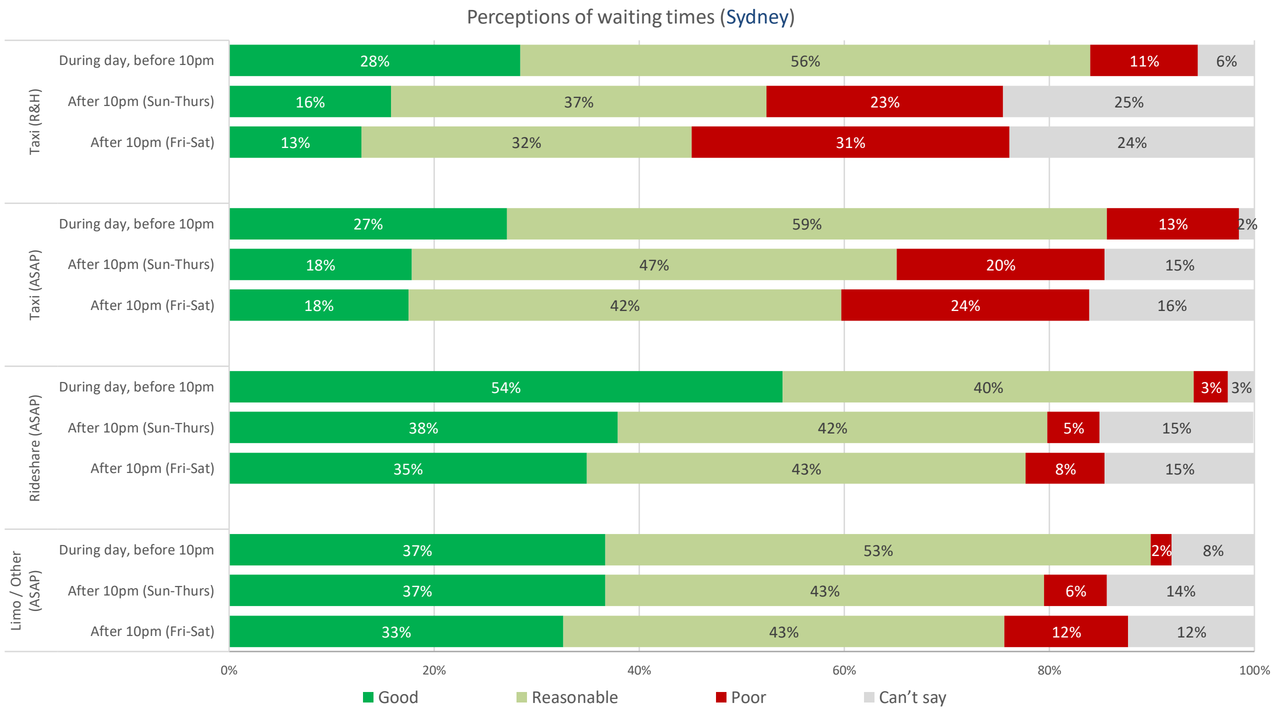
As might be expected, perceived waiting times are somewhat poorer in peak periods after 10pm, across all transport types and locations.

Comparing the patterns of results across years shows a fairly consistent and stable pattern. If anything, the 2019 ratings tend to be slightly more positive than the 2018 ratings, when looking at the ratio of 'good + reasonable' ratings to 'poor' ratings. This is not to a substantial magnitude nor consistent across locations or transport types, but overall these ratios are just a little more positive in 2019.

There are several other general observations about waiting times which have been consistently seen:

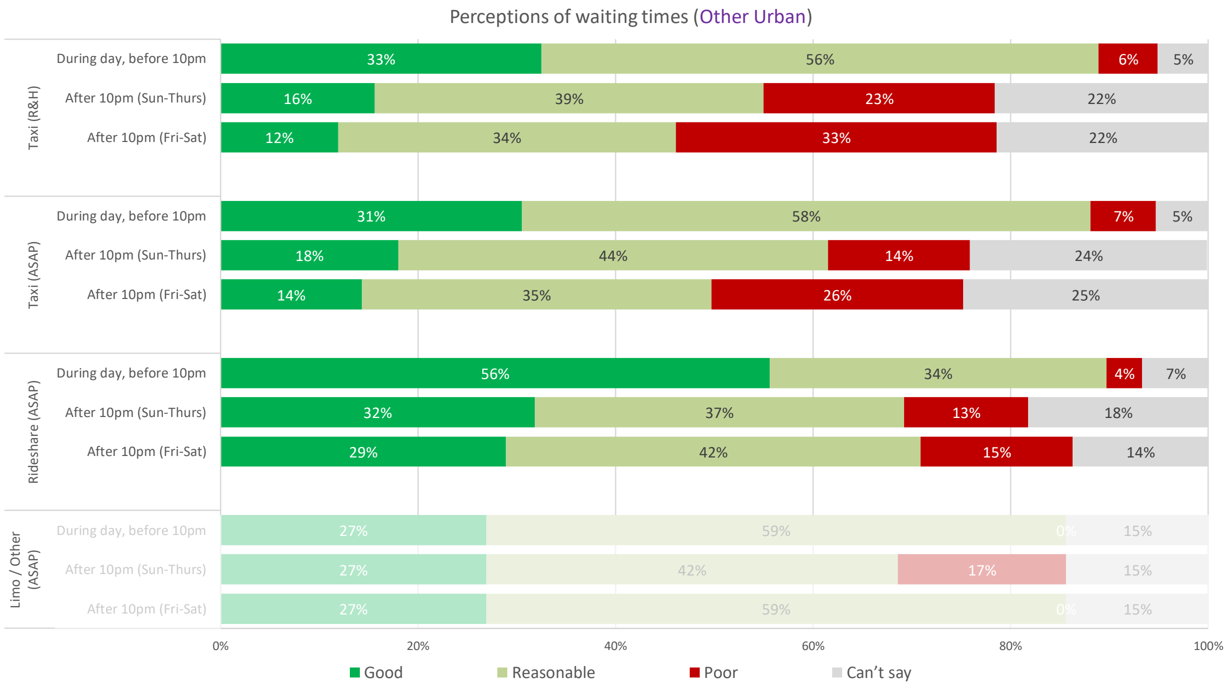
- Rideshare waiting times continue to be viewed more favourably than taxi waiting times.
- There is little perceived distinction between rank and hail taxi waiting times and ASAP booking waiting times.
- Perceptions of waiting times are more similar than dissimilar across locations.

Figure 46: User perceptions of waiting times (Sydney) Q23-26



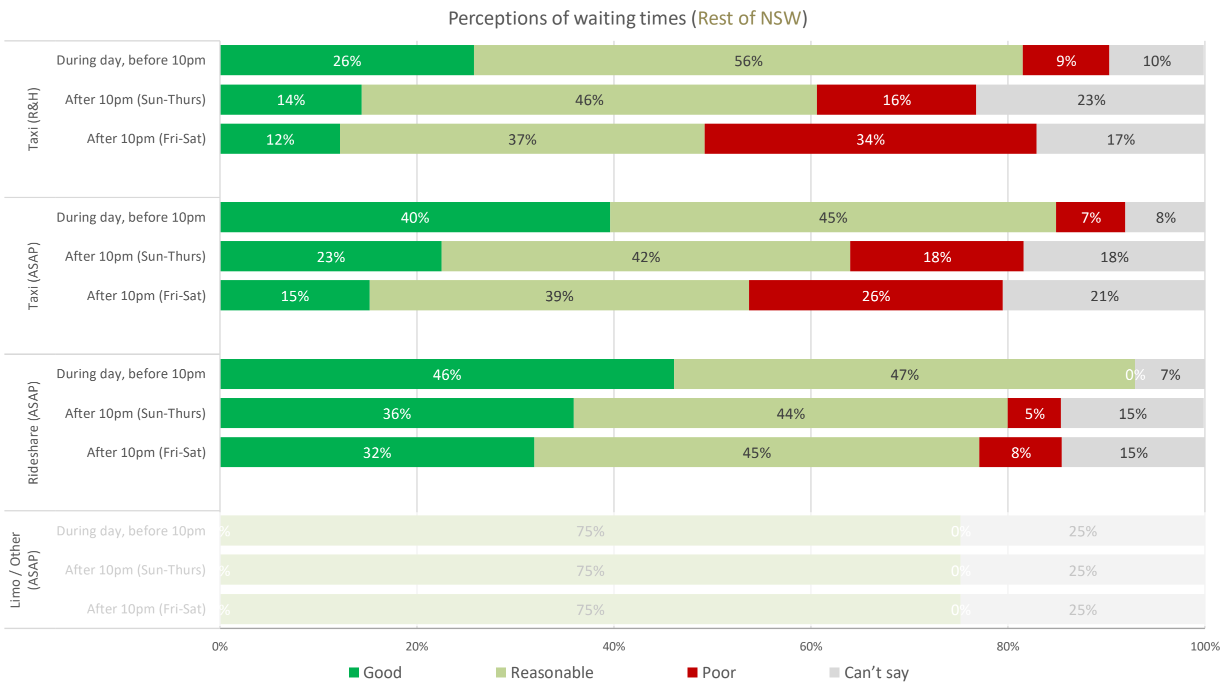
Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=678; Taxi ASAP n=404; Rideshare ASAP n=816; Limo / Other ASAP n=49]

Figure 47: User perceptions of waiting times (Other Urban) Q23-26



Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=90; Taxi ASAP n=109; Rideshare ASAP n=121; Limo / Other ASAP n=6*]

Figure 48: User perceptions of waiting times (Rest of NSW) Q23-26

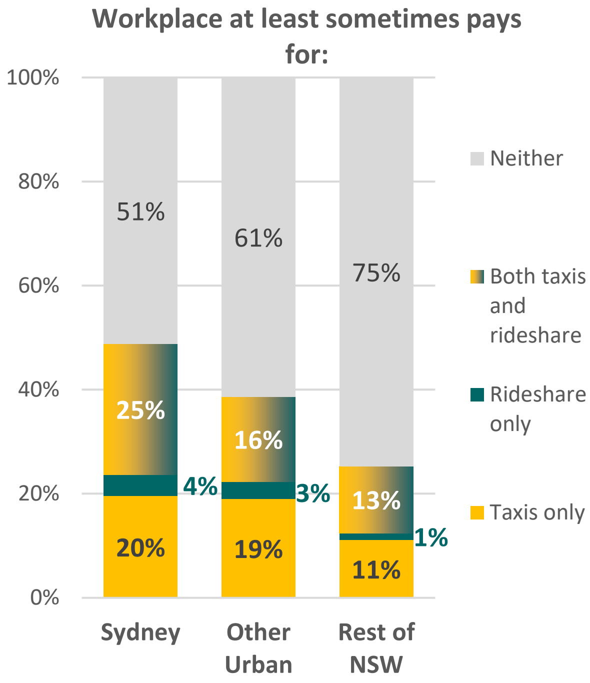


Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=66; Taxi ASAP n=98; Rideshare ASAP n=46; Limo / Other ASAP n=4*]

* Results from sample sizes below n=30 are greyed out and should be interpreted with caution

E. Workplace Policies

Figure 49: Workplace paying for transport Q32



Just under half of all employed Sydney respondents (49%) said that their employer at least sometimes pays for employees to use point-to-point transport, a little lower than the previous year (54%). The proportions were considerably lower in the other locations, with the lowest recorded in the rest of NSW (25%).

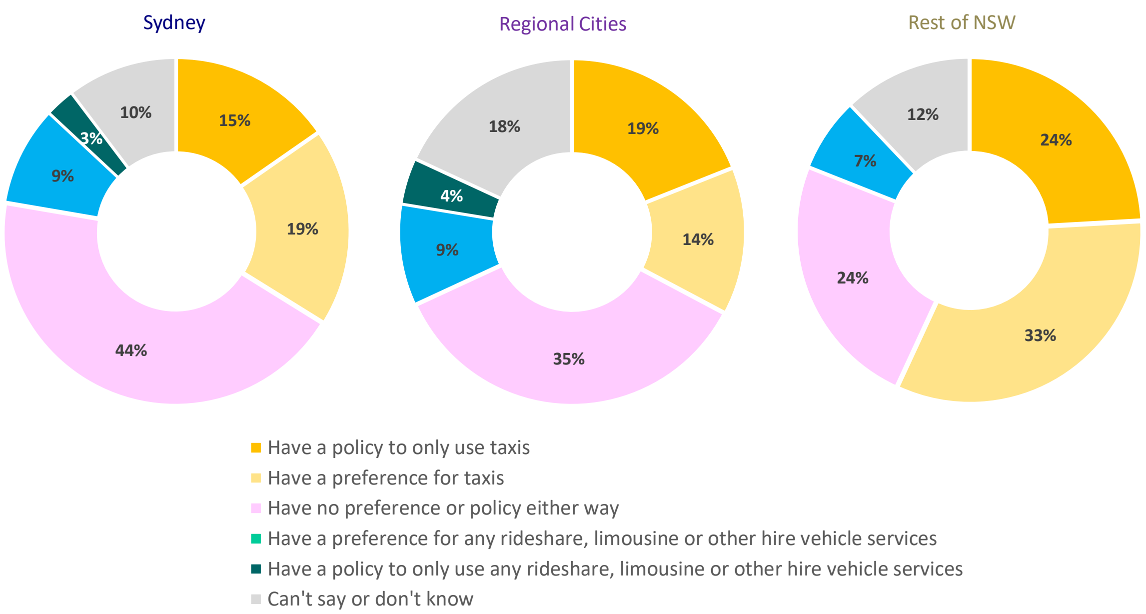
Where employers *did* pay for transport, as in previous years almost all at least sometimes pay for taxis – either only taxis or in combination with rideshare.

Very few paid for rideshare use only, and not taxis (just 1%-4%). Much larger proportions paid for taxis only (11%-20%).

In all locations, the proportions who reported their employer at least sometimes paid for rideshare were in line with 2018 results. The proportion paying for taxis only was marginally lower in Sydney (-1%), the same in Other Urban areas and lower in the Rest of NSW (-12%).

Employers are still more likely to have a policy or a preference to use taxis than rideshare, where a preference or policy is known to exist. There have been no substantive changes in the last 12 months, though even with the small sample size involved, the Rest of NSW result does suggest a greater focus on employers paying for taxis as opposed to rideshare services.

Figure 50: Workplace policies and preferences on paying for transport Q34



Base = Workplace at least sometimes pays for transport [Sydney n=659; Other Urban n=116; Rest of NSW n=58]

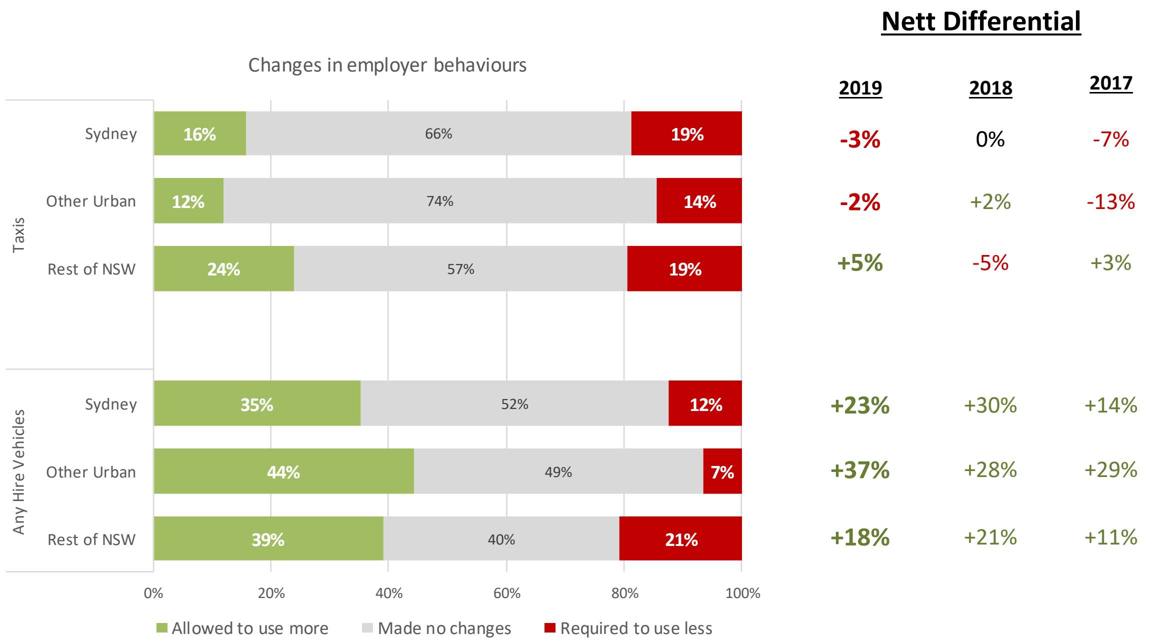
Change in employer behaviours

While respondents perceived that their employers currently are more likely to pay for employees to use taxis than hire vehicles[2], and to have policies and preferences that are more positive towards taxis – they have also consistently indicated they see a nett change away from them.

In Sydney, 19% of respondents whose employers at least sometimes pay for staff to use taxis said they required them to do so less in the last 12 months, but similar number allowed taxi use to increase (nett differential = -3%). The equivalent figure for hire vehicles was +23%, a pattern which has been seen in 2017 and 2018 too.

Outside of Sydney, perceptions of work-related use of taxis was also quite static, but large positive differentials were seen for rideshare. Taken together, these results suggest that while taxis do remain the dominant form of point-to-point transport used by workplaces, there is an increasing acceptance of rideshare.

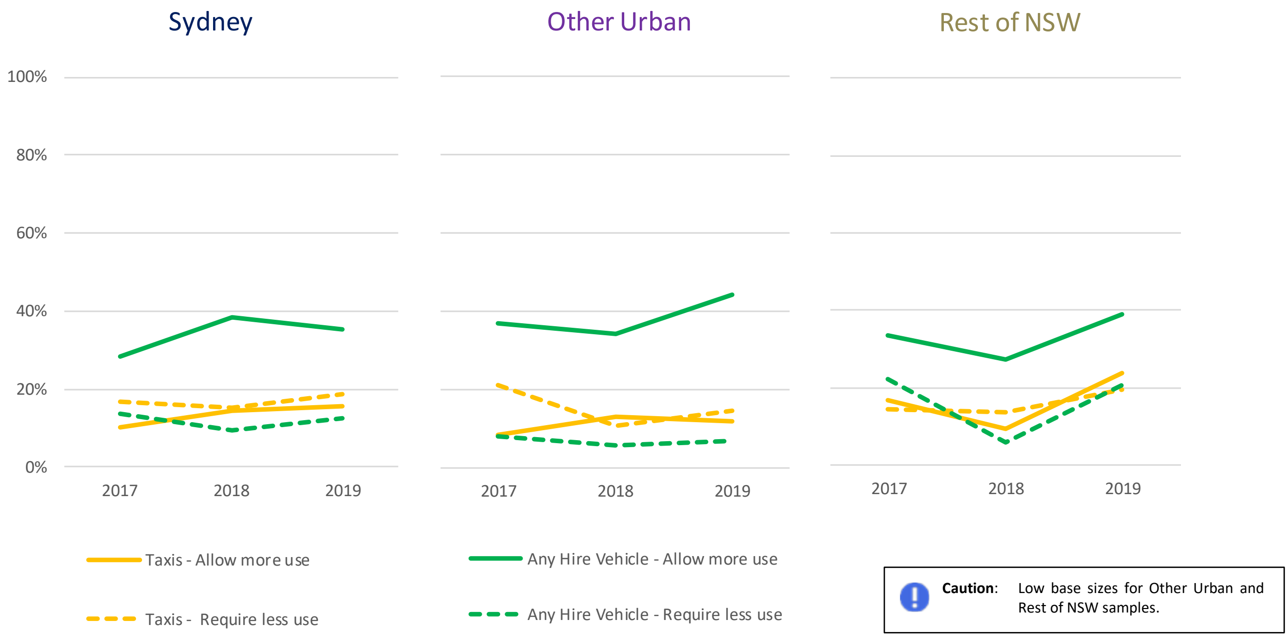
Figure 51: Changes in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33



Base = Workplace at least sometimes pays for that transport [Sydney n=395-605; Other Urban n=58-106; Rest of NSW n=32-55]

[2] This question referred to "any rideshare, limousine or other hire vehicle"

Figure 52: Change over time in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33



F. Last-Trip Details

Type of point-to-point transport

68% of Sydney respondents had used point-to-point transport in the last 6 months, along with 51% in other urban areas and 40% in the rest of NSW.

Similar to the 2018 survey, the usage of rideshare services has increased and surpassed the usage of taxis in Sydney. In Other Urban areas, the change in demand is less sharp as both services are used equally, and in the Rest of NSW taxis are still the predominant transport service being used. The following tracking chart highlights the increasing demand of rideshare services across areas.

Figure 53: Usage of vehicle types for last trip (base = all respondents) QX

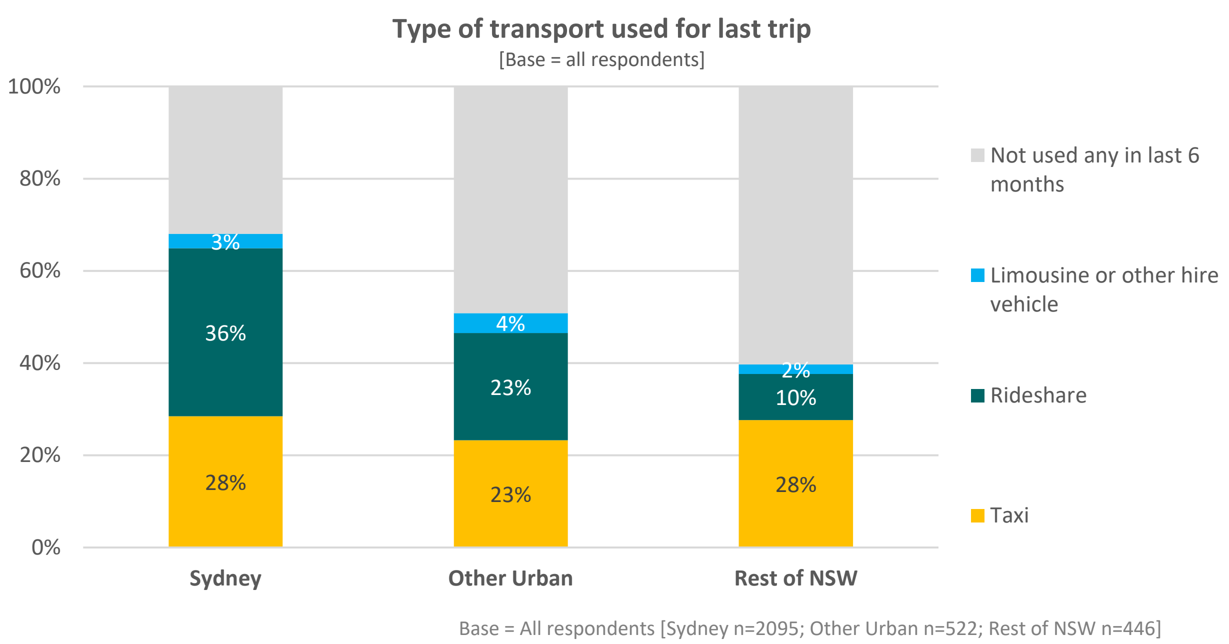
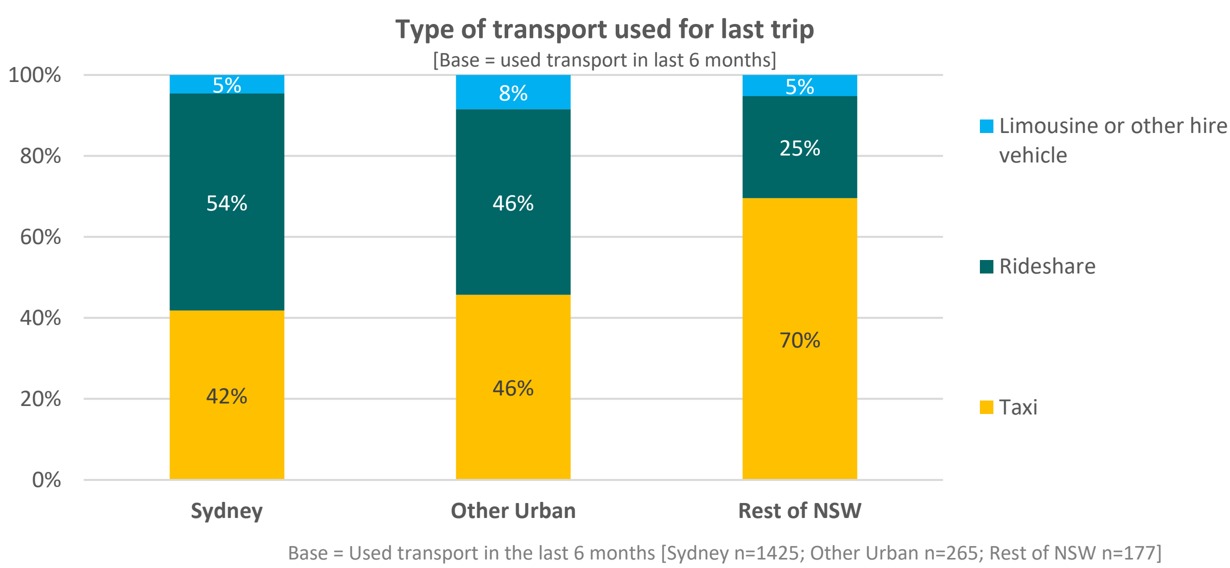
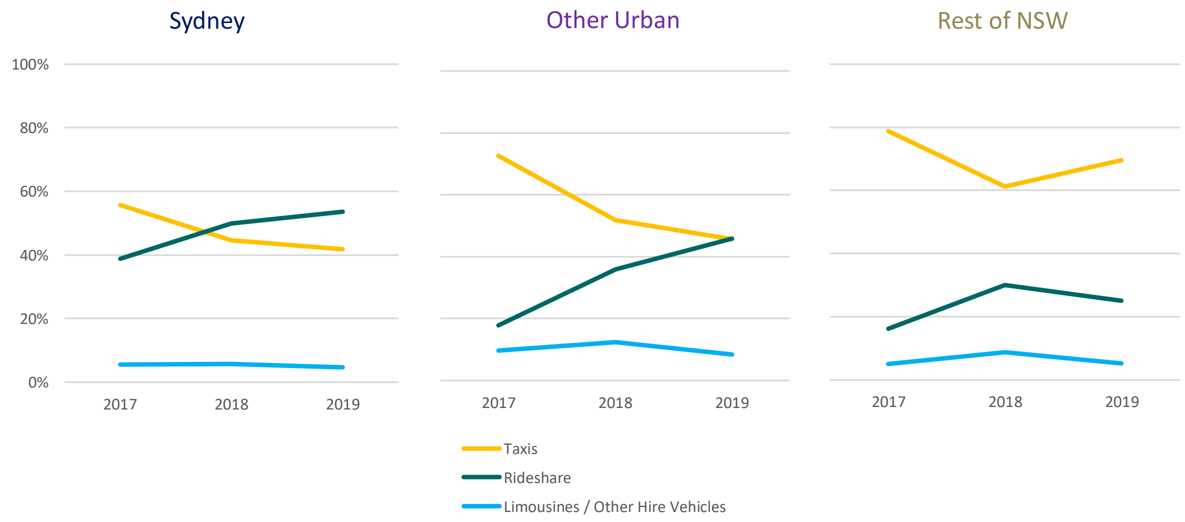


Figure 54: Usage of vehicle types for last trip (base = used transport in last 6 months) QX



The tracking chart here is derived from the data in the lower of the charts on the previous page, showing the proportion of last trips taken using different forms of transport only for respondents who had taken at least one trip in the last six months. The slopes of the yellow taxi lines and the dark green rideshare lines very clearly show the change in distribution across the years.

Figure 55: Changes in usage of vehicle types for last trip (base = used transport in last 6 months) QX



Pooled Rideshare

Pooled rideshare services are relatively new, and involve multiple customers making a similar trip sharing the costs. Surprisingly high proportions of respondents whose last trip was a rideshare reported using a pooled rideshare in all three locations – Sydney (19%), Other urban (11%) and Rest of NSW (17%). The equivalent figures in the 2018 survey were 16%, 18% and 27% respectively.

***Note**: These figures may be elevated by some respondents misunderstanding the term to mean 'sharing costs with people they were travelling with' rather than 'strangers who happen to be making a similar trip'. We suggest that the description of pooled rideshare may be expanded in future surveys to ensure correct interpretation. Comparable results across years suggest no dramatic change, but misinterpretation is potentially masking trends in this data.*

Last Trip Characteristics

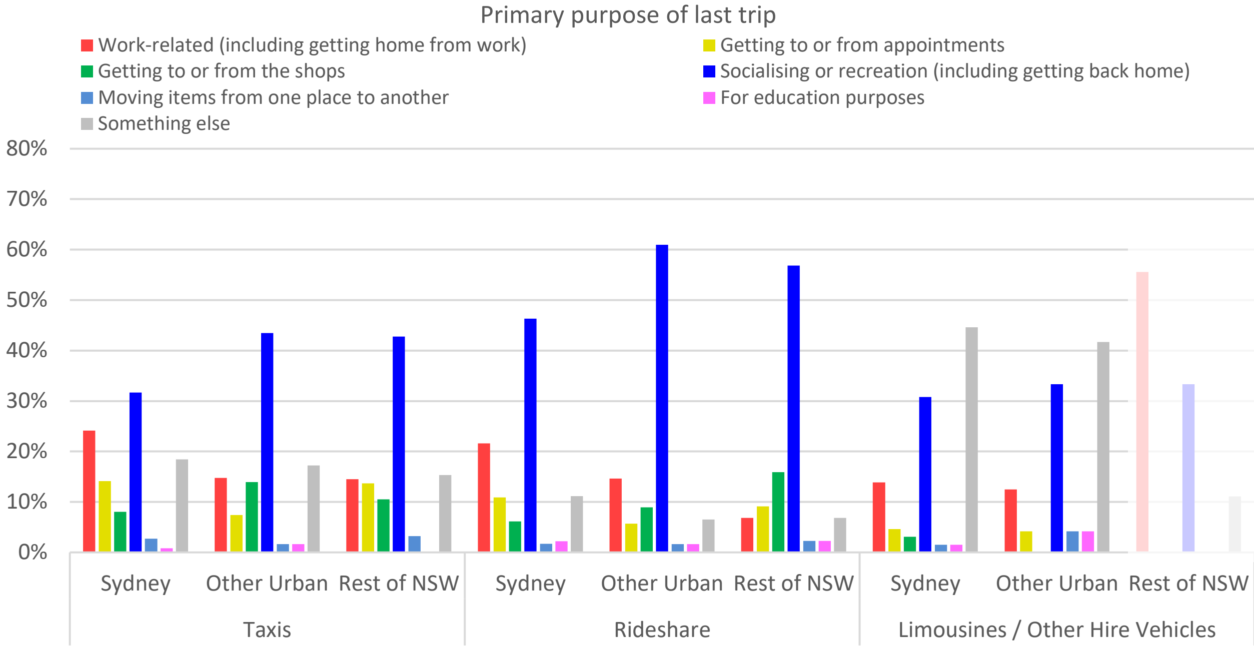
This section looks at details of respondents' last trip in any type of point-to-point transport. Sample sizes for hire vehicles outside of Sydney are very small, and results for groups with sample of less than 30 are generally shown in a greyed out form in all tables and charts, and should be interpreted with great caution due to the small sample sizes.

Group	Sydney – taxi	Sydney – Rideshare	Sydney – Limo / Other HV	Other Urban – taxi	Other Urban – Rideshare	Other Urban – Limo / Other HV	Rest of NSW – taxi	Rest of NSW – Rideshare	Rest of NSW – Limo / Other HV
2019 Sample	596	764	65	121	122	22	123	45	9*
2018 Sample	649	726	82	140	97	34	110	54	16*
2017 Sample	719	151	126	151	37	26*	71	20*	8*

Purpose

Socialising remains the dominant purpose for point-to-point transport trips generally. This was especially the case for rideshare, and whilst still the main purpose - less so for taxis in all areas. This pattern is very similar to that seen in 2018.

Figure 56: Last trip – Primary purpose Q39



Last trip – Primary Purpose	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*596*	*121*	*123*	*764*	*122*	*45*	*65*	*22*	*9**
Work-related (inc getting home from work)	**24%**	**15%**	**15%**	**22%**	**15%**	7%	**14%**	**13%**	56%
Getting to or from **appointments**	14%	7%	14%	11%	6%	**9%**	5%	4%	0%
Getting to or from the **shops**	8%	14%	10%	6%	**9%**	**16%**	3%	0%	0%
Socialising or recreation (inc getting back home)	**32%**	**43%**	**43%**	**46%**	**61%**	**57%**	**31%**	**33%**	33%
Moving items from one place to another	3%	2%	3%	2%	2%	2%	2%	4%	0%
For **education** purposes	1%	2%	0%	2%	2%	2%	2%	4%	0%
Something else	**18%**	**17%**	**15%**	**11%**	7%	7%	**45%**	**42%**	11%

Bold figures = Top 3 responses. Most "something else" responses were back-coded into existing categories.
Note small base sizes in some cases.

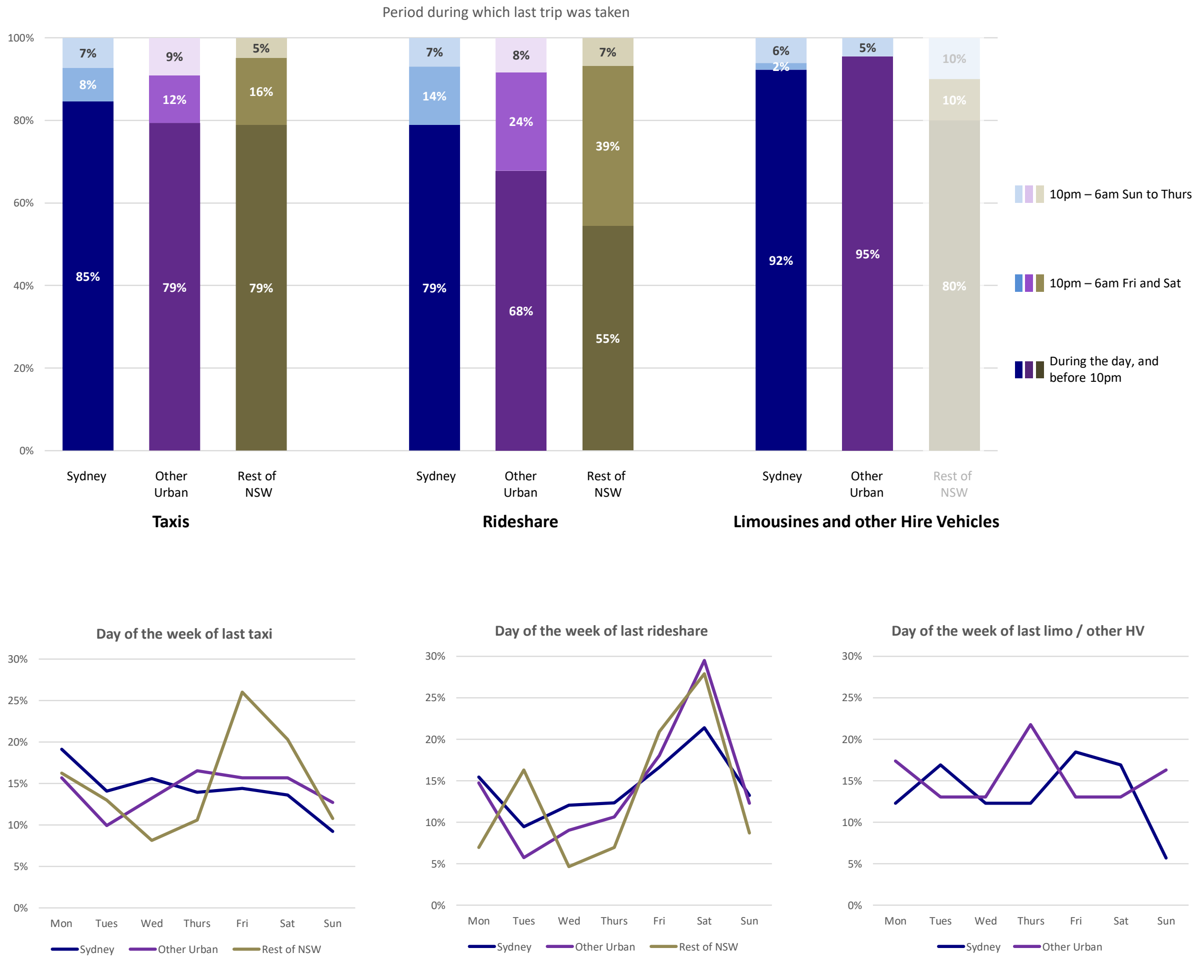
Time

The great majority of last trips reported on were during the day or before 10pm.

In Sydney, across all three types of transport between 79% and 92% were daytime or before 10pm trips. Of the small proportions of trips taken after 10pm and before 6am the next day, the taxi trips were similarly split between Sunday-Thursday and Friday-Saturday. Rideshare trips after 10pm were much more likely to be on Friday and Saturday nights than Sunday-Thursday nights.

Overall, rideshare trips showed a substantial peak around Fridays and Saturdays as compared to taxis, which were more evenly distributed through the week including on the weekends. This different distribution, alongside the different ways taxis and rideshare are obtained suggests that they are use in quite different ways by their user bases.

Figure 57: Last trip – Period and day commenced Q38



Base = Used transport in the last 6 months [Sydney n=65-596; Other Urban n=22-121; Rest of NSW n=10*-123]

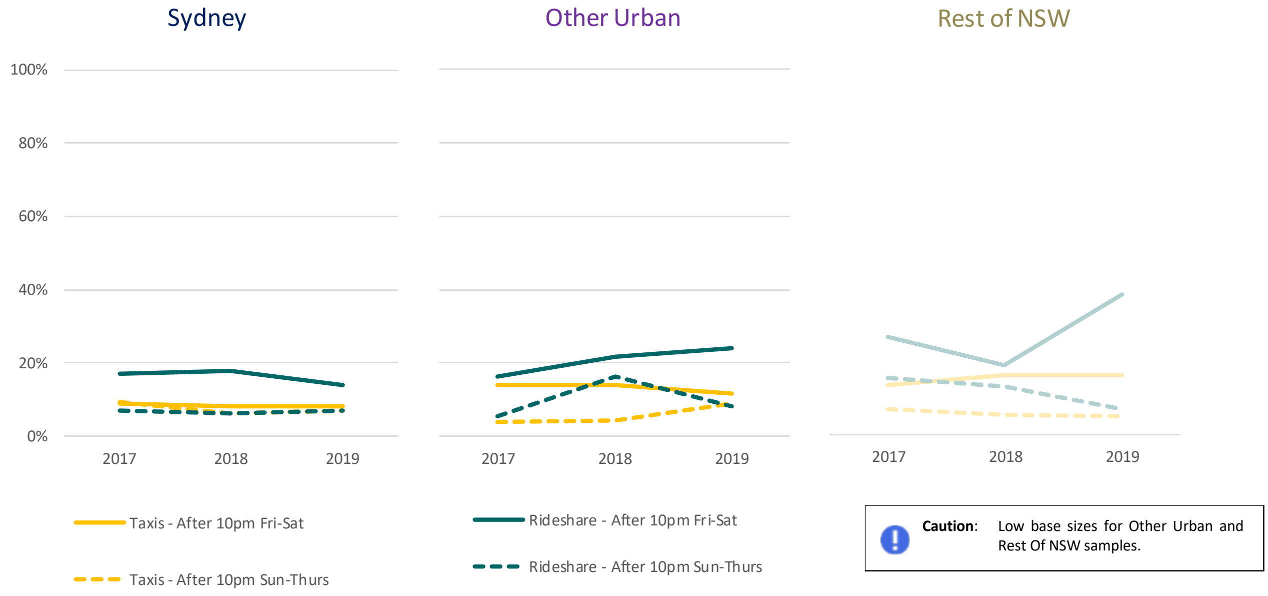
Caution: Low base sizes for Other Urban and Rest Of NSW samples.

***Note**: This question was slightly modified from 2017 to 2018. In 2017 the response table showed up to midnight for each day, and then midnight-6am as part of the following day. The data suggested that some respondents were mis-classifying trips taken after midnight. In 2018 a separate category of 'after midnight' was added to each day, and the following day started with 'early morning – midday'. The improved response scale has given a more natural looking distribution.*

The tracking chart looking at the proportion of last trips shows an increase in rideshare trips in Other Urban areas after 10pm Friday-Saturday. However, similar proportions of taxis and rideshares were seen after 10pm Sunday-Thursday. Whilst lower than in Other Urban areas, rideshares after 10pm Friday-Saturday in Sydney were also the most heavily used.

The rest of NSW samples here are very small, and so results should be interpreted with caution.

Figure 58: Last trip – Change in proportion of Last Trips after 10pm Q38



Note: Due to changes in the way this question was asked in 2018, some care should be taken comparing the post-2018 results to 2017.

Pick-up Location

Private homes were the most commonly reported pick up point for a last trip. Taxis (and limousines and other hire vehicles) were somewhat more likely than rideshare to be used to or from an airport or transport hub, while a slightly higher proportion of rideshare trips are to or from a pub, club or similar type of location. One interesting pattern in the data is that rideshare services are equally likely to pick up or drop off at a private home in Sydney and Other Urban areas, whereas taxis are more likely to drop off and limousines and other hire vehicles are more likely to pick up.

Figure 59: Last trip – pick up locations Q37

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

Sydney Last trip – Pick up / Drop off locations	Taxi		Rideshare		Limousines or other hire vehicle services	
	Pick up	*Drop off*	*Pick up*	*Drop off*	*Pick up*	*Drop off*
Sample size (Excludes can't recall):	*596*	*596*	*764*	*764*	*65*	*65*
A **private home** or apartment	**30%**	**51%**	**47%**	**43%**	**58%**	**31%**
A **workplace** or office	**14%**	**9%**	**11%**	**10%**	**6%**	3%
A **shop** or shopping centre	7%	4%	4%	6%	2%	0%
A **pub, club** or other similar type of location	5%	4%	8%	10%	3%	5%
In a **CBD**, town centre or other busy area	14%	7%	**10%**	6%	3%	6%
At an **event**	3%	5%	3%	6%	3%	**15%**
At an **airport**	**14%**	**13%**	8%	**12%**	**18%**	**34%**
Train station / other **transport** connection	9%	4%	5%	5%	0%	6%
Hospital or medical facility	2%	3%	1%	2%	2%	0%
On a **street**/ hailed from **street**	<1%	<1%	0%	0%	0%	0%
Hotel	<1%	<1%	1%	<1%	2%	0%
Somewhere else	1%	1%	1%	1%	3%	0%

Other Urban Last trip – Pick up / Drop off locations	Taxi		Rideshare		Limousines or other hire vehicle services	
	Pick up	*Drop off*	*Pick up*	*Drop off*	*Pick up*	*Drop off*
Sample size (Excludes can't recall):	*121*	*121*	*122*	*122*	*22*	*22*
A **private home** or apartment	**32%**	**58%**	**53%**	**49%**	**66%**	**32%**
A **workplace** or office	10%	6%	**5%**	6%	0%	0%
A **shop** or shopping centre	10%	**8%**	5%	3%	0%	0%
A **pub, club** or other similar type of location	**10%**	5%	**21%**	**24%**	**4%**	0%
In a **CBD**, town centre or other busy area	7%	2%	3%	2%	0%	0%
At an **event**	0%	3%	2%	3%	0%	4%
At an **airport**	1%	**7%**	3%	4%	**23%**	**56%**
Train station / other **transport** connection	**25%**	6%	5%	**6%**	4%	**8%**
Hospital or medical facility	4%	4%	1%	2%	0%	0%
On a **street**/ hailed from **street**	0%	0%	0%	0%	0%	0%
Hotel	0%	0%	0%	0%	3%	0%
Somewhere else	1%	1%	1%	1%	0%	0%

Base: Used the type of transport in the last 6 months

Bold figures = Top 3 responses. Most "something else" responses were back-coded into existing categories. Note small base sizes in some cases.

Rest of NSW Last trip – Pick up / Drop off locations	Taxi		Rideshare		Limousines or other hire vehicle services	
	Pick up	***Drop off***	***Pick up***	***Drop off***	***Pick up***	***Drop off***
Sample size (Excludes can't recall):	*123*	*123*	*45*	*45*	*9*	*9*
A **private home** or apartment	**48%**	**44%**	**36%**	**58%**	**27%**	**28%**
A **workplace** or office	8%	6%	7%	2%	17%	18%
A **shop** or shopping centre	5%	5%	11%	4%	0%	0%
A **pub, club** or other similar type of location	**12%**	**16%**	**18%**	**11%**	**20%**	**22%**
In a **CBD**, town centre or other busy area	**11%**	6%	**15%**	**12%**	0%	0%
At an **event**	3%	2%	0%	6%	0%	0%
At an **airport**	5%	7%	7%	2%	**36%**	**32%**
Train station / other **transport** connection	3%	**10%**	6%	2%	0%	0%
Hospital or medical facility	3%	4%	0%	0%	0%	0%
On a **street**/ hailed from **street**	0%	0%	0%	0%	0%	0%
Hotel	1%	0%	0%	2%	0%	0%
Somewhere else	0%	0%	0%	0%	0%	0%

Base: Used the type of transport in the last 6 months

Bold figures = Top 3 responses. Most "something else" responses were back-coded into existing categories.
Note small base sizes in some cases.

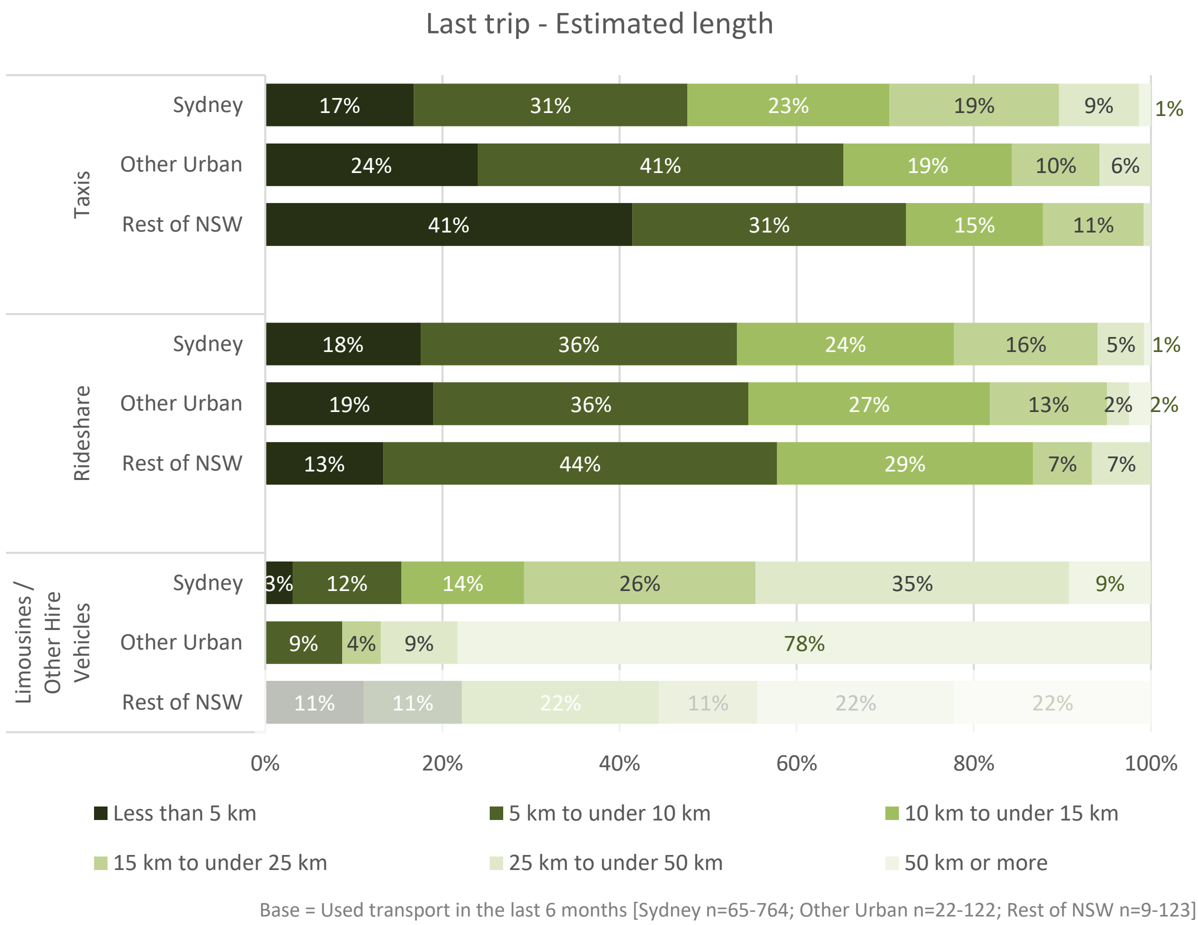
Length

Estimated length of taxi trips tend to be shortest from the Rest of NSW respondents, and longest in Sydney, likely reflecting the smaller geographic size of centres. Around three-quarters of Rest of NSW trips, and two-thirds of trips in Other Urban areas were estimated to be under 10km, compared to just half of those in Sydney.

There appears to be less variation in length of rideshare trips across locations (bearing in mind the smaller sample sizes outside Sydney, but this pattern has been observed in both the 2017 and 2018 survey). Rideshare and taxi trips in Sydney are estimated to be similar lengths.

Perhaps not surprisingly, trips in limousines or other hire vehicles tend to be somewhat longer.

Figure 60: Last trip – Estimated length Q55



Reason for Choice of Vehicle Type

Since the 2018 survey, reasons for choosing the particular type of transport service are allowed more detail, collecting not only the *main* reason for the choice, but also any other reasons ('*total*'). In line with 2018, perceptions of convenience are still the most important reason for choice, both as the main reason and amongst total reasons.

Waiting times were more important than travel times as the *main* reason, but for taxis quicker travel time was just as likely to appear in the list of *total* reasons. Interestingly, waiting times are only slightly more important in the list of total reasons for choosing rideshare than for choosing taxis in Sydney, but much more important in other areas.

Figure 61: Reasons for using a particular type of transport for the most recent trip Q40

Reasons for use instead of other transport options or driving yourself		Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
		Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
n=	*Main*	*596*	*121*	*123*	*764*	*122*	*45*	*65*	*22*	*9*
	Total	*986*	*202*	*190*	*1,302*	*207*	*75*	*115*	*39*	*13*
More convenient than driving (eg parking / luggage / raining / drinking)	Main	20%	28%	34%	21%	29%	23%	31%	43%	23%
	Total	39%	47%	49%	41%	53%	42%	55%	69%	67%
Quicker to get / shorter waiting time	Main	24%	12%	16%	27%	29%	23%	8%	7%	17%
	Total	39%	30%	33%	50%	51%	62%	16%	12%	42%
I didn't have access to any other transport options	Main	12%	25%	34%	7%	6%	11%	5%	0%	10%
	Total	23%	37%	49%	16%	14%	21%	9%	10%	29%
Quicker or more direct travel time	Main	15%	12%	3%	8%	4%	12%	3%	7%	0%
	Total	38%	26%	16%	29%	13%	18%	21%	18%	0%
More convenient than other paid transport options I could have used	Main	9%	6%	4%	11%	5%	4%	5%	19%	10%
	Total	33%	19%	18%	35%	36%	24%	30%	50%	47%
It's what I am most comfortable or familiar using	Main	6%	4%	3%	3%	6%	4%	14%	0%	0%
	Total	19%	22%	13%	13%	17%	14%	22%	16%	25%
More reliable than alternatives	Main	5%	3%	3%	5%	5%	2%	12%	4%	0%
	Total	15%	14%	15%	23%	26%	21%	35%	19%	62%
Work-related	Main	1%	1%	0%	0%	0%	0%	0%	0%	10%
	Total	2%	1%	0%	0%	0%	0%	0%	0%	10%
Makes different types of vehicle available	Main	2%	2%	1%	1%	2%	0%	8%	4%	22%
	Total	5%	8%	4%	4%	7%	3%	18%	15%	48%
Used for transport to/from train station or airport	Main	0%	0%	0%	0%	0%	0%	0%	0%	8%
	Total	0%	1%	3%	0%	0%	0%	0%	0%	8%
Pre-booked or provided for another reason besides work	Main	1%	1%	0%	1%	1%	0%	5%	8%	0%
	Total	1%	1%	0%	1%	1%	0%	5%	8%	0%

Reasons for use instead of other transport options or driving yourself		Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
		Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
n=	*Main*	*596*	*121*	*123*	*764*	*122*	*45*	*65*	*22*	*9*
	Total	*986*	*202*	*190*	*1,302*	*207*	*75*	*115*	*39*	*13*
Cheaper than alternatives	**Main**	**2%**	**4%**	**1%**	**16%**	**13%**	**20%**	**9%**	**8%**	**0%**
	Total	7%	11%	8%	41%	40%	50%	15%	8%	62%
Could not drive because of an injury / poor vision / travelling with disabled person / too tired	**Main**	**1%**	**1%**	**1%**	**0%**	**0%**	**2%**	**0%**	**0%**	**0%**
	Total	1%	1%	2%	0%	0%	2%	0%	0%	0%
Quicker or more direct, it was there straight away	**Main**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
	Total	0%	0%	0%	0%	0%	0%	0%	0%	0%
Safety / late at night / safer than public transport	**Main**	**0%**	**1%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
	Total	1%	0%	0%	0%	0%	0%	2%	0%	0%
Another reason	**Main**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**2%**	**0%**	**0%**
	Total	3%	5%	4%	1%	0%	0%	4%	0%	0%

Base = Used transport in the last 6 months

Obtaining a Vehicle

The bulk of taxis (75%-91%) are obtained through a combination of rank and hail, and by phoning taxi companies. In Sydney rank and hail represented slightly over half of all most recent taxi trips (54%). Outside of Sydney the proportions switch to be more dominantly from telephone, and hailing accounts for a very small proportion only.

Rideshare is almost exclusively obtained by smartphone apps (around three quarters of all last rideshares were obtained this way) or by an internet booking. In the 2019 data there was a slight trend towards internet bookings compared to using smartphone apps, but this result would need to be sustained over time to be considered reliable. The relatively small number of last trips that were by limousines and other hire vehicles were mostly obtained by phone or internet bookings, or by contacting a driver directly.

Figure 62: Last trip – Method of obtaining vehicle Q41

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

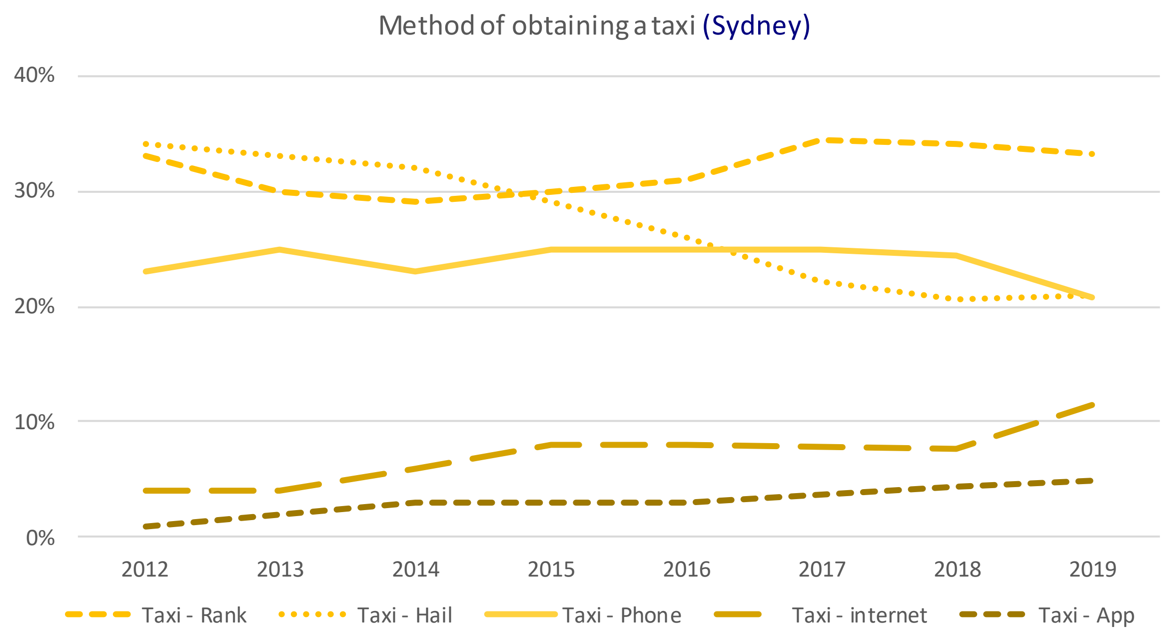
Last trip – Method of obtaining vehicle	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*596*	*122*	*123*	*764*	*121*	*45*	*65*	*22*	*10**
At a taxi **rank**	**33%**	**36%**	**20%**						
Hailed/waved down on the street	**21%**	5%	5%						
Rank and **Hail**	**54%**	**41%**	**25%**						
Phoned a **taxi** company	**21%**	**41%**	**66%**						
Rank and **Hail + Phone taxi company**	**75%**	**82%**	**91%**						
By **calling** a **phone number**				4%	7%	7%	**29%**	**64%**	**50%**
By **internet** booking	11%	11%	3%	16%	18%	16%	**26%**	18%	**30%**
Contacted a **driver directly**	6%	2%	1%	2%	2%	4%	17%	5%	0%
Had a **regular booking**	2%	1%	1%	2%	0%	0%	9%	0%	0%
Used a **smartphone application** (app)	5%	1%	2%	**76%**	**70%**	**69%**	2%	0%	0%
Some other way	0%	1%	1%	0%	1%	0%	3%	0%	0%
I'm not sure because someone else organised it	1%	2%	2%	1%	1%	4%	14%	14%	20%

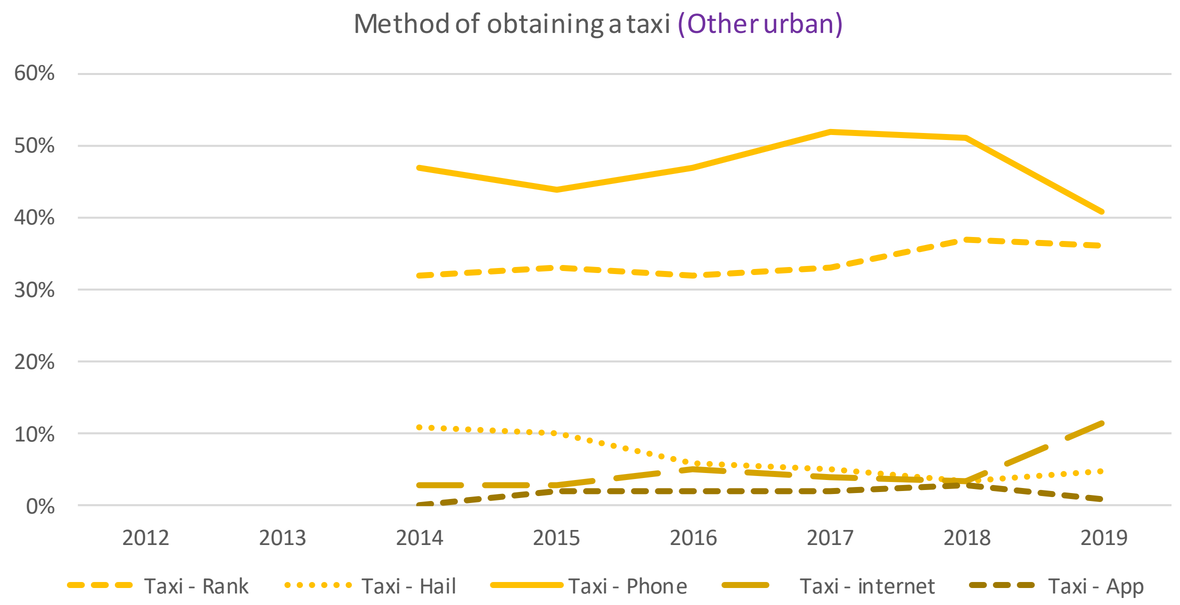
Bold figures = 20%+ of category. Note small base sizes in some cases.

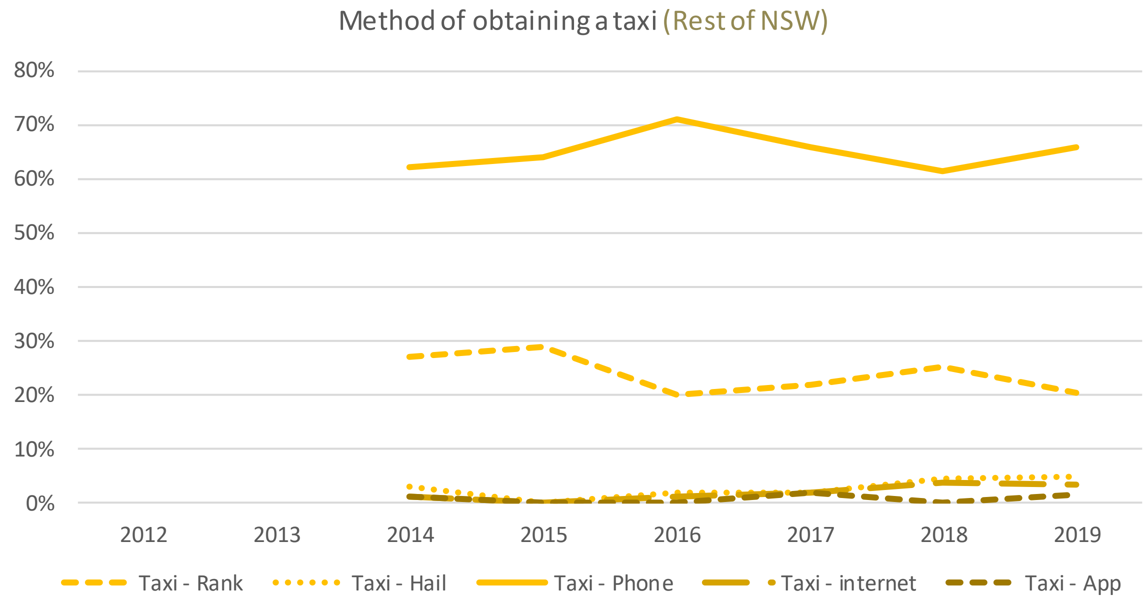
The most substantive change over time in how taxis are obtained has been the increase in taxis obtained via app (see tracking charts next page). This change seems to be primarily reducing use of phone to call taxis, or relying on hailing one in the street. Outside of this change, the relative proportions of different methods are maintained relatively steady.

The proportion of taxis obtained by phone is higher outside Sydney, with hailing in particular much less common.

Figure 63: Last trip – Changes in method of obtaining vehicle Q41







In Sydney booked taxis were slightly more likely to have been ASAP / next available (55%) bookings rather than pre-booked (45%). Outside Sydney, taxis were predominantly ASAP bookings. In all locations, the last rideshare trip was much more dominated by ASAP bookings, while limousines and other hire vehicles were predominantly pre-booked.

Figure 64: Last trip – Type of booking Q48

NOTE: Reduced base sizes / small bases sizes for Other Urban and Rest of NSW.

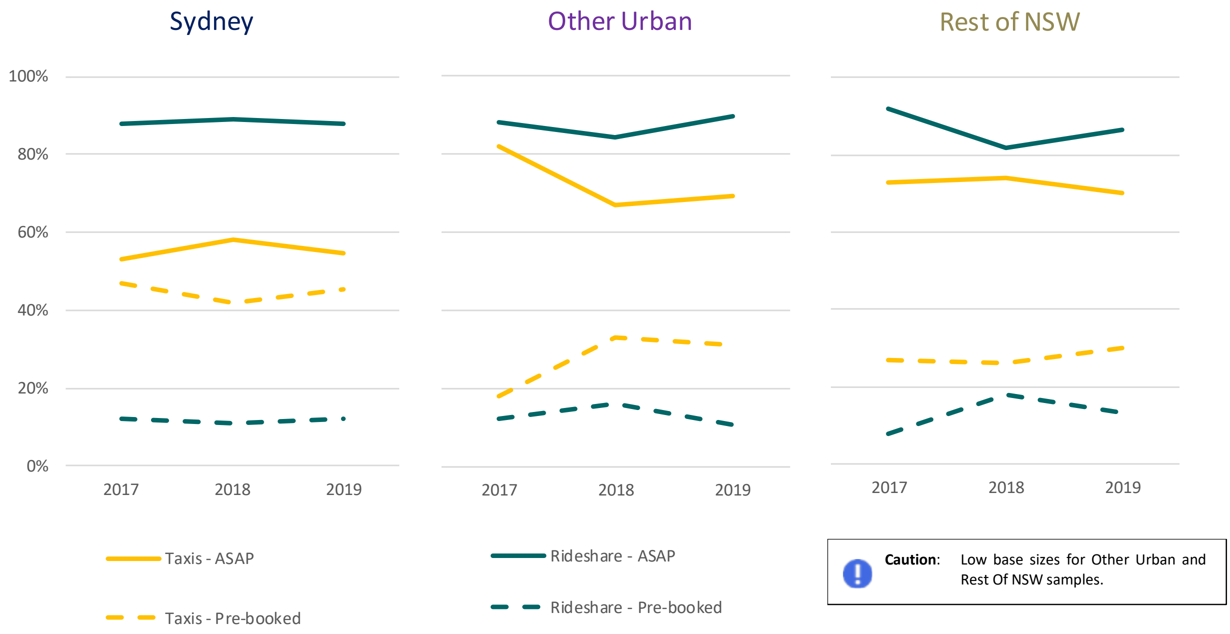
Last trip – Type of booking	**Taxi**			**Rideshare**			**Limousines or other hire vehicle services**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*255*	*67*	*89*	*741*	*119*	*43*	*48*	*19*	*7**
ASAP (as soon as possible / next available)	**55%**	**69%**	**70%**	**88%**	**89%**	**86%**	10%	16%	0%
Pre-booked (for a particular time)	45%	31%	30%	12%	11%	13%	**90%**	**84%**	100%

Following the trend from previous years, the proportion of rideshare bookings (both ASAP and pre-booked) remained relatively stable in Sydney. Whilst slight increases were seen in the number of taxis pre-booked, the pattern over the last three surveys doesn't show any obvious trendline.

In other areas, a slight rise in rideshare ASAP bookings was seen from 2018-2019. However, it should be noted that sample sizes are small and these variations are not statistically significant. Again, it will be of interest to observe whether these differences may be indicative of real changes over several more waves.

Figure 65: Last trip – Changes in type of booking Q48

NOTE: Reduced base sizes / small bases sizes for Other Urban and Rest of NSW.



Awareness of service provider

In line with previous years, users of rideshare services are much more aware of who the provider is than users of taxis or users of limousines and other hire vehicles.

Less than half of taxi users who booked their taxi were either aware of the service provider identity, or at least *"thought so"*. Much fewer again of those who caught a taxi by rank or hail did (20-24%) – which is a natural consequence of the method of acquisition. Only around 1-in-3 users of limousines and other hire vehicles thought they were aware.

While rates of provider awareness were much higher for rideshare users in Sydney and Other Urban areas, this tends to be slightly less so for the Rest of NSW. Despite being higher than the other services, there was actually a decrease in awareness from last year, which may possibly be attributed to an increase in rideshare providers – making it more difficult to differentiate between them. This is further seen in the breakdown of the identified providers, with identification of Uber decreasing in Sydney from 94% in 2018 to 67% in 2019, 98% to 66% in Other Urban areas and 91% to 35% in the Rest of NSW.

Figure 66: Last trip – Awareness of service provider Q42/Q45

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

Last trip – Awareness of service provider	Taxi					
Base: Used the type of transport in the last 6 months AND method of obtaining last vehicle	**Sydney** Rank & Hail	**Sydney** Booked	**Other Urban** Rank & Hail	**Other Urban** Booked	**Rest of NSW** Rank & Hail	**Rest of NSW** Booked
Sample size	*324*	*221*	***50***	*65*	*31*	*88*
Aware	18%	39%	15%	29%	14%	39%
"Think so"	3%	6%	8%	7%	6%	3%
Not aware	**79%**	**54%**	**76%**	**64%**	**80%**	**58%**

	Rideshare			Limousines or other hire vehicle services		
	Sydney	**Other Urban**	**Rest of NSW**	**Sydney**	**Other Urban**	**Rest of NSW**
Sample size	*726*	*116*	*40*	*37*	*18**	*7**
Aware	**80%**	**73%**	**58%**	32%	31%	10%
"Think so"	3%	3%	2%	8%	4%	13%
Not aware	18%	24%	40%	**59%**	**64%**	**78%**

Bold figures = 50%+ of category. Note small base sizes in some cases.

Consideration of booking when using rank and hail

Around 1-in-5 respondents in Sydney whose most recent trip was a rank or hail taxi did at least consider calling or booking a vehicle too. Similar proportions were seen in the sample outside of Sydney, however due to the small sample size, these results should be considered with care.

Figure 67: Rank and Hail taxi users who considered calling or booking transport instead Q43

	Sydney	Other Urban	Rest of NSW
Proportion of people whose last trip was by taxi obtained from Rank or Hail who at least considered calling or booking instead:	18%	28%	22%
Sample size	*324*	*50*	*31*

Base = Used Rank or Hail taxi for the last trip

Clearly the most common reason for not calling or booking a vehicle after considering doing so was the immediate access to a taxi by rank or hail. Beyond this immediate availability, the two most common other reasons were not expecting a booked taxi to be any faster, or not wanting to pay a booking fee. Even amongst the small sample of cases outside of Sydney, these same three reasons appeared indicatively to be amongst the most prevalent.

The relative proportions of these reasons are very consistent with what has been previously seen, even with the small samples involved.

Figure 68: Reasons for not calling or booking transport after considering that option Q44

NOTE: Small bases sizes. Interpret grey numbers with caution

Reasons for not calling or booking after considering that option	Sydney	Other Urban	Rest of NSW
There was a taxi immediately available at the rank / to be hailed on the street	45%	64%	71%
Didn't think a booked taxi would arrive any faster	22%	14%	-
Did not want to pay a booking fee	29%	13%	29%
Didn't know how to book a taxi or other vehicle	12%	14%	-
Didn't have access to a phone or the internet to make a booking	7%	13%	14%
Wanted to be anonymous	9%	7%	29%
Something else	2%	-	-
Sample size	*58*	*14**	*7**

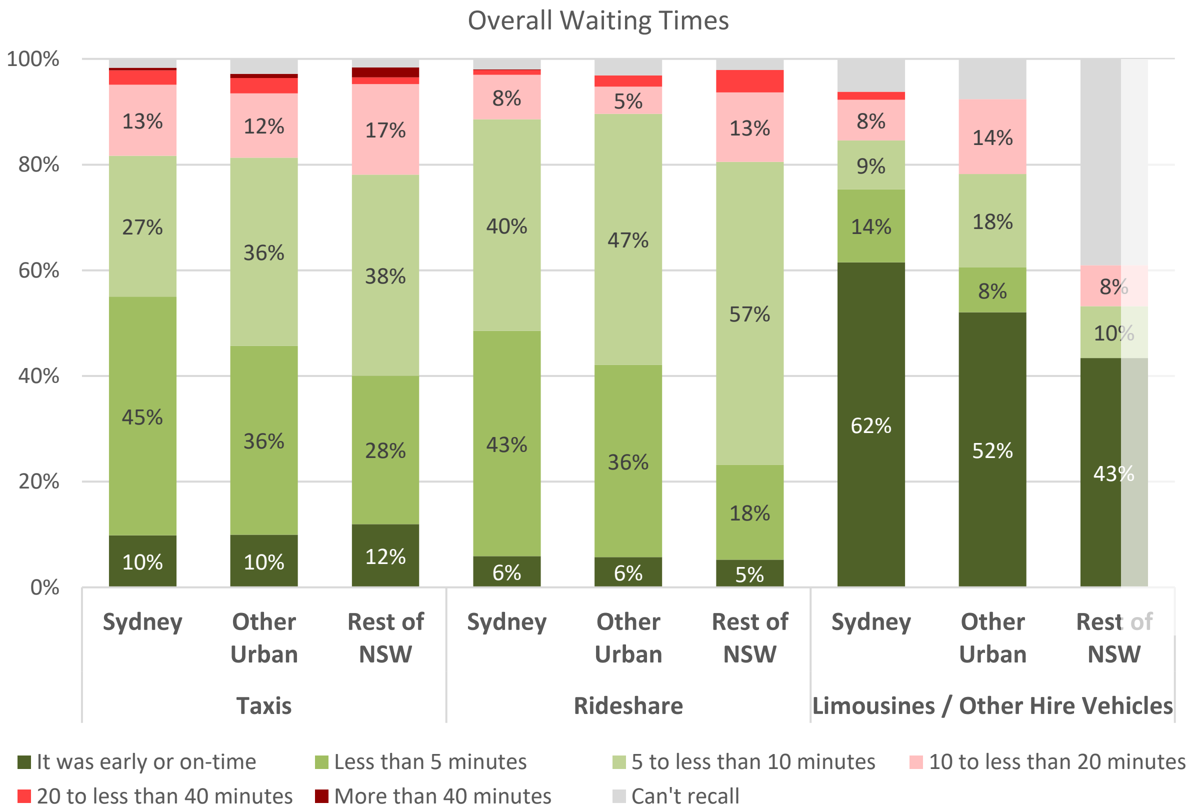
Base = Used Rank or Hail taxi for the last trip AND considered calling or booking transport

Waiting Time

Despite waiting times and availability being perceived to be strong competitive advantages of rideshare services over taxis in general, there was virtually no reported differences on the last time used, and if anything, taxis were slightly more likely than rideshare to be obtained within 5 minutes. However, the detailed breakdowns in the following section show that the strong performance of taxis overall is mostly driven by short rank and hail waiting times, and in the ASAP booking category – which is most directly equivalent to the typical rideshare process of getting a vehicle – waiting times for taxis are typically somewhat longer.

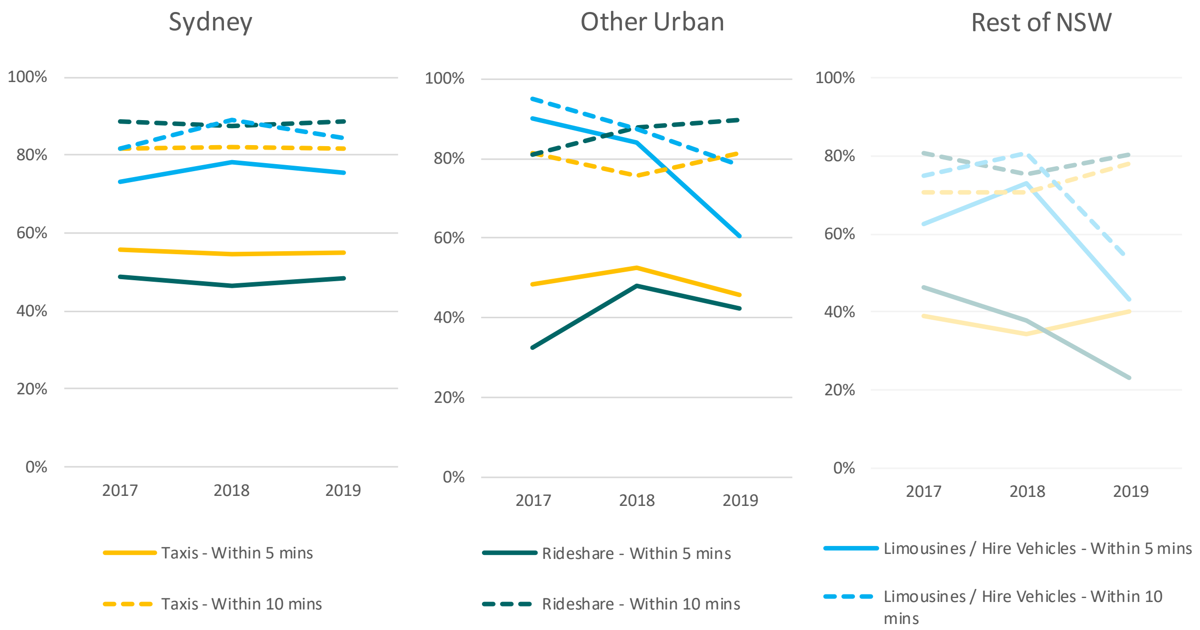
Figure 69: Overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52

Last trip – Overall Waiting Time	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*596*	*121*	*123*	*764*	*122*	*45*	*65*	*22*	*9**
It was **early** or **on-time** *(pre-booked only)*	10%	10%	12%	6%	6%	5%	62%	52%	43%
Less than 5 minutes	45%	36%	28%	43%	36%	18%	14%	8%	0%
Within 5 minutes	**55%**	**46%**	**40%**	**49%**	**42%**	**23%**	**75%**	**61%**	**43%**
5 to less than 10 minutes	27%	36%	38%	40%	47%	57%	9%	18%	10%
Within 10 minutes	**82%**	**81%**	**78%**	**89%**	**90%**	**81%**	**85%**	**78%**	**53%**
10 to less than 20 minutes	13%	12%	17%	8%	5%	13%	8%	14%	8%
20 to less than 40 minutes	3%	3%	1%	1%	2%	4%	2%	0%	0%
More than 40 minutes	1%	1%	2%	0%	0%	0%	0%	0%	0%



Base = Last trip within last 6 months [Sydney n=65-764; Other Urban n=22-122; Rest of NSW n=9-123]

Figure 70: Changes in overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Detailed waiting times by method of obtaining vehicles

While there was little overall difference in the waiting times reported for taxis and rideshare, in rideshare's core category of ASAP booking, rideshare users did report shorter wait times than taxi users in all locations. For pre-booked cars though, similar wait times were recorded for both taxis and rideshares.

Figure 71: Detailed waiting times by methods of obtaining a vehicle Q46/47/50/52

Last trip – Overall Waiting Time	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Rank									
Less than 5 minutes	**71%**	**80%**	**63%**						
5 to less than 10 minutes	17%	13%	18%						
10 to less than 20 minutes	10%	4%	19%						
20 to less than 40 minutes	1%	0%	0%						
More than 40 minutes	0%	0%	0%						
Can't recall	1%	3%	0%						
Sample	*198*	*44*	*25*						
Hail									
Less than 5 minutes	**66%**	17%	**66%**						
5 to less than 10 minutes	26%	**83%**	34%						
10 to less than 20 minutes	6%	0%	0%						
20 to less than 40 minutes	1%	0%	0%						
More than 40 minutes	0%	0%	0%						
Can't recall	1%	0%	0%						
Sample	*125*	*6*	*6*						
ASAP Booking									
Less than 5 minutes	16%	7%	19%	**46%**	39%	22%	**40%**	0%	0%
5 to less than 10 minutes	**50%**	**54%**	**52%**	43%	**52%**	**58%**	21%	**69%**	0%
10 to less than 20 minutes	25%	27%	21%	8%	5%	16%	20%	0%	0%
20 to less than 40 minutes	7%	5%	3%	1%	2%	5%	0%	0%	0%
More than 40 minutes	1%	2%	4%	0%	0%	0%	0%	0%	0%
Can't recall	1%	4%	2%	2%	3%	0%	20%	31%	0%
Sample	*140*	*46*	*62*	*651*	*107*	*37*	*5*	*3*	*0*
Pre-Booking									
Early or on time	**47%**	**56%**	**53%**	**43%**	**55%**	41%	**82%**	**74%**	**54%**
Less than 5 minutes	18%	17%	13%	20%	12%	0%	0%	6%	0%
5 to less than 10 minutes	17%	20%	22%	22%	21%	**59%**	8%	0%	0%
10 to less than 20 minutes	14%	3%	8%	9%	7%	0%	6%	15%	10%
20 to less than 40 minutes	2%	5%	0%	3%	6%	0%	2%	0%	0%
More than 40 minutes	2%	0%	0%	0%	0%	0%	0%	0%	0%
Can't recall	2%	0%	3%	3%	0%	0%	2%	5%	36%
Sample	*125*	*22*	*28*	*105*	*13*	*6*	*49*	*16*	*7*

Waiting time estimates

Waiting time estimates are extremely common for ASAP booked rideshares, with only 3%-14% who were confident they were not given a waiting time estimate.

For taxis, providing waiting time estimates is less widespread, though still common. Close to two-thirds of the respondents from Sydney who had booked an ASAP taxi recalled being given an estimate, while outside of Sydney similar advice of wait times were reported in both Other Urban and Rest of NSW regions. Given the smaller size of these samples outside Sydney, this level of variability does not necessarily indicate substantially different practices.

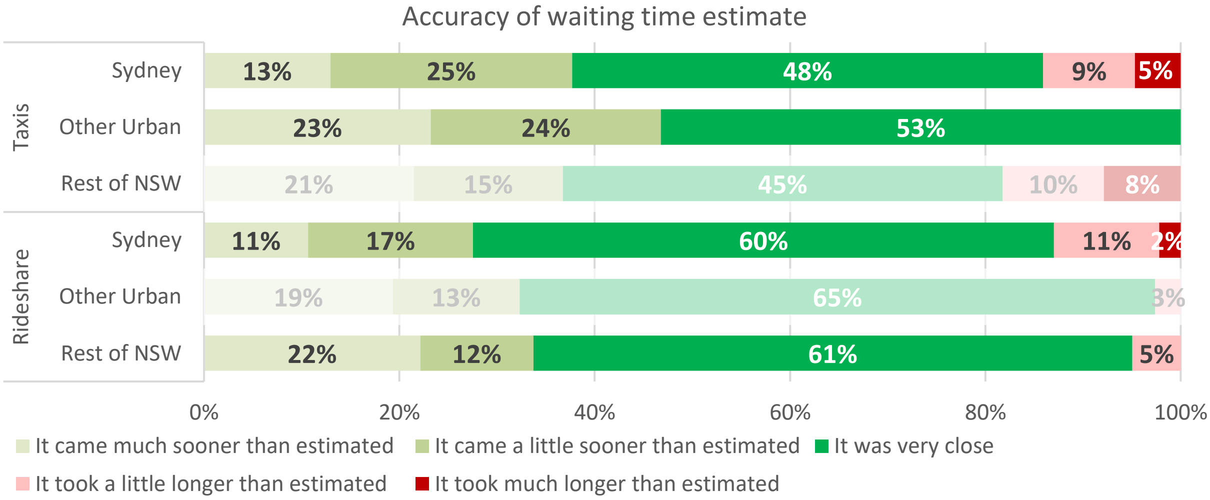
Figure 72: Last trip – Prevalence of being given a waiting time estimate for ASAP bookings Q49

Last trip – Given waiting time estimate	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*140*	*46*	*62*	*651*	*107*	*37*	*5**	*3**	*0**
Yes	**61%**	54%	**53%**	**91%**	**89%**	**76%**	40%	74%	0%
No	29%	**34%**	28%	3%	4%	14%	20%	26%	0%
Can't recall	*10%*	*12%*	*19%*	*5%*	*7%*	10%	*41%*	*0%*	*0%*

Waiting time estimates were mostly considered very close, or the vehicle actually arrived sooner than estimated. Only small proportions of those given an estimate by either taxis or rideshare services reported the vehicle being longer than estimated. The survey results suggest that rideshare waiting time estimates are perceived by users as somewhat more accurate than those for taxis.

These patterns are consistent with previous years. Sydney rideshare is the only combination with a large enough sample size to look meaningfully at the tracking variation, and that shows very consistent results across the years. Across other location / service combinations the 2019 results are indicative of fewer earlier than estimated arrivals, but this is only a suggestion given the sample sizes, and would need to be examined over future waves for more confidence.

Figure 73: Last trip – Accuracy of waiting time estimate for ASAP bookings Q53



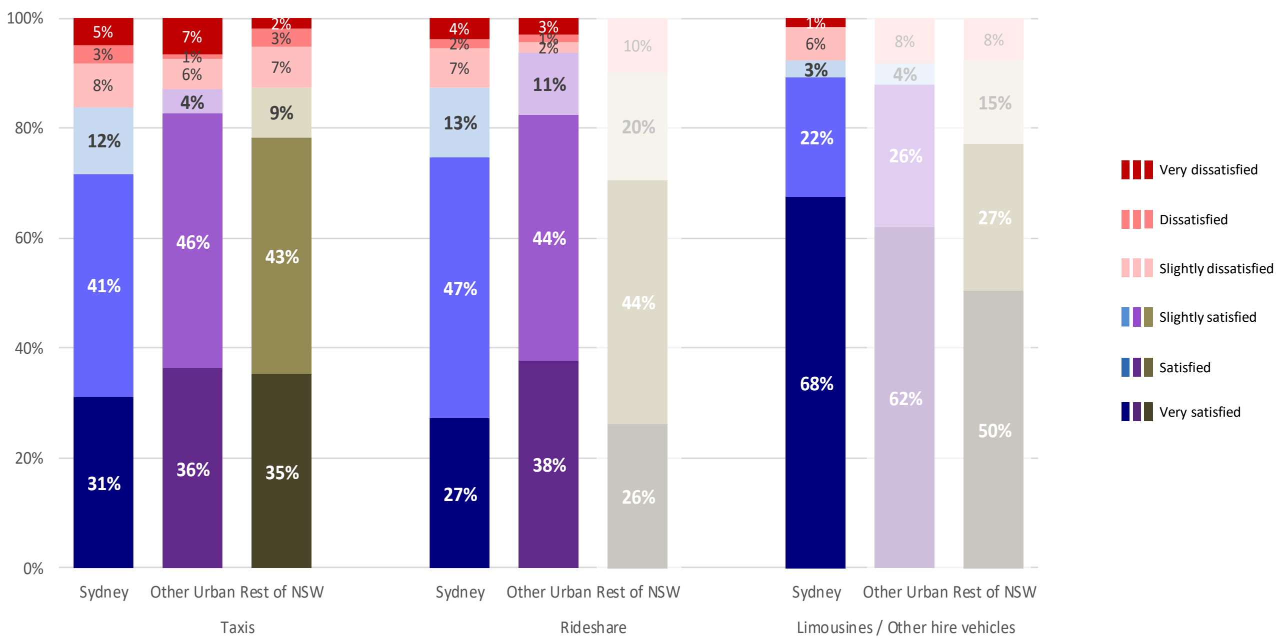
Base = Last trip within last 6 months by ASAP booking and given a waiting time estimate
[Sydney n=85-594; Other Urban n=25-95; Rest of NSW n=28-33]

Satisfaction with waiting times

Satisfaction with waiting times remains strong (84%-91%) and fairly consistent across locations and types of transport service, though there were some small variations.

- Satisfaction with rideshare waiting times was marginally higher than with taxis in all locations.
- Satisfaction in the rest of NSW was the lowest in 2018, but more equivalent in 2019. Total satisfaction with waiting times for all the services increased slightly in 2019, except for rideshare in Sydney.

Figure 74: Last trip – Satisfaction with waiting time Q54



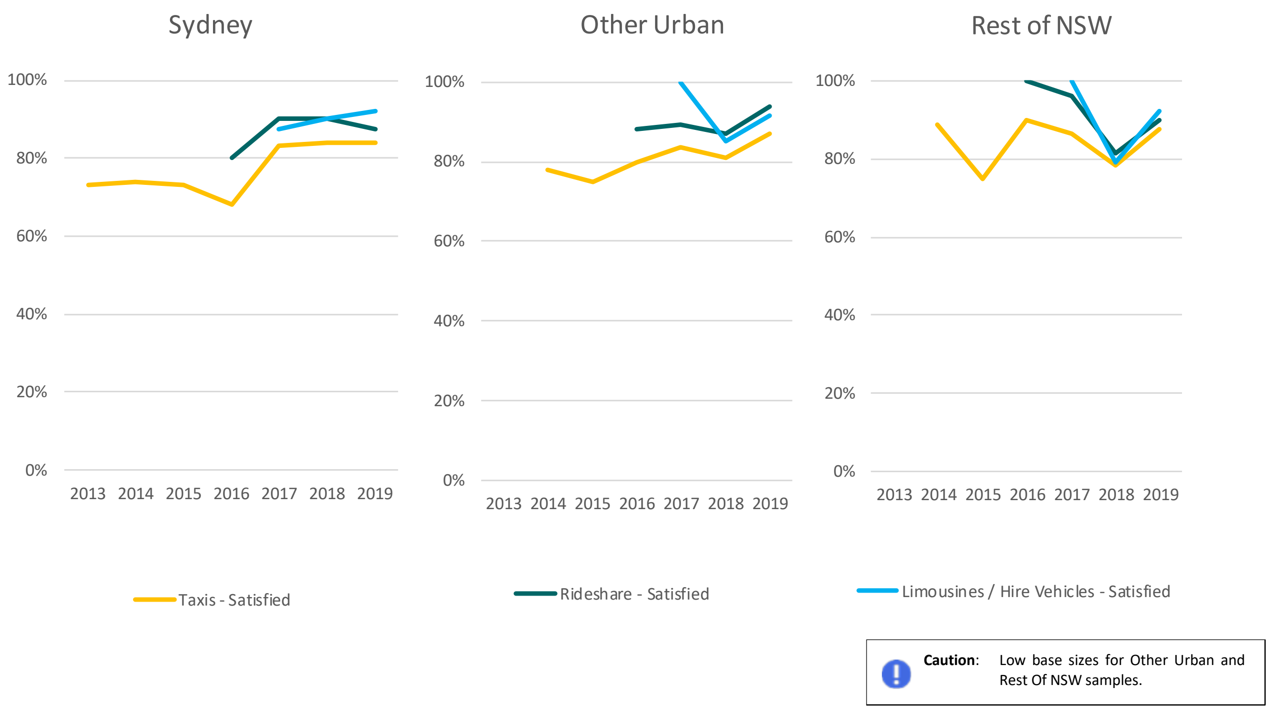
Last trip – Waiting Time Satisfaction	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*596*	*121*	*65*	*764*	*122*	*22*	*65*	*22*	*9**
Very Satisfied	31%	36%	35%	27%	38%	26%	68%	62%	50%
Satisfied	41%	46%	43%	47%	44%	44%	22%	26%	27%
Slightly satisfied	12%	4%	9%	13%	11%	20%	3%	4%	15%
Total Satisfied	**84%**	**87%**	**88%**	**88%**	**94%**	**90%**	**92%**	**92%**	**92%**
Slightly dissatisfied	8%	6%	7%	7%	2%	10%	6%	8%	8%
Dissatisfied	3%	1%	3%	2%	1%	0%	0%	0%	0%
Very dissatisfied	5%	7%	2%	4%	3%	0%	1%	0%	0%
Total Dissatisfied	**16%**	**13%**	**12%**	**12%**	**6%**	**10%**	**8%**	**8%**	**8%**

Satisfaction with waiting times in Sydney has remained mostly stable across the last two surveys with the new methodology, and for taxis, consistently high in comparison to the pre-2017 results.

In Other Urban areas rideshare is also consistently ahead of taxis, and to a similar extent. Both services achieving similar increases in wait time satisfaction.

The rest of NSW fluctuates more with relatively smaller sample sizes outside of taxis, but satisfaction with waiting times for all services was higher than 2018.

Figure 75: Last trip – Changes in satisfaction with waiting time Q54



Tolerance

Similar levels of satisfaction were seen at each of the different wait time increments across all regions. Most notably, in comparison to 2018, respondents in all areas felt less positive about wait times over 40 minutes.

This pattern, for a measure like tolerance that should be fairly stable, suggests that the margin of the differences observed are likely to be within normal fluctuations, rather than revealing substantively different expectations and tolerances.

Fares

***Note**: In 2017 this question used the response categories shown below. However, while this encourages more responses by making it easy to answer, it gives less precise data for more sensitive analysis. In 2018 an exact figure (estimate) was introduced. This resulted in a higher level of respondents saying that they were unsure because someone else paid, or that they could not recall, but gives more detailed and likely more reliable data from the remaining respondents. The tables shown below show the full range of responses at the top, and then a summary excluding the 'others paid / can't recall' in the bottom table. For consistency across years, the bottom 'filtered' data will be used for comparison.*

Reported taxi fares in 2019 were higher in Sydney than outside of Sydney (reflecting the longer trips), but rideshare fares were more equal across locations. Only 15% of taxi fares in Sydney were under $20, and 37% were under $40. By comparison, 27% of Sydney rideshare fares were under $20 and 47% were under $40. In Other Urban areas the sample size is much smaller, but both taxi fares and rideshare fares were reported to be around the same distribution of costs as Sydney rideshare fares.

Figure 76: Last trip – Fares paid Q59

Top table: full responses; Bottom table: Excluding when others paid / can't recall

Last trip – Fares Paid *Full responses, recoded to categories*	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*596*	*121*	*123*	*764*	*122*	*45*	*65*	*22*	*9**
Less than $10 Category 1	2%	2%	5%	5%	7%	7%	2%	4%	0%
At least $10 and less than $20 Category 2	13%	23%	28%	23%	24%	20%	3%	0%	0%
Less than $20	15%	24%	33%	27%	30%	27%	5%	4%	0%
At least $20 and less than $30 Category 3	12%	15%	14%	14%	16%	7%	0%	0%	0%
At least $30 and less than $40 Category 4	10%	6%	3%	7%	3%	9%	5%	0%	8%
Less than $40	**37%**	**45%**	**51%**	**47%**	**49%**	**43%**	9%	4%	8%
At least $40 and less than $60 Category 5	9%	9%	5%	9%	3%	4%	2%	0%	0%
At least $60 and less than $100 Category 6	12%	3%	5%	5%	5%	3%	22%	4%	18%
At least $100 and less than $150 Category 7	5%	0%	0%	1%	1%	0%	17%	8%	15%
$150 or more Category 8	1%	0%	1%	0%	0%	0%	9%	34%	0%
$40 or more	27%	12%	11%	16%	9%	7%	**49%**	46%	33%
I'm not sure because someone else paid	13%	15%	12%	15%	16%	15%	28%	17%	30%
Can't recall	23%	29%	26%	22%	26%	35%	14%	33%	29%

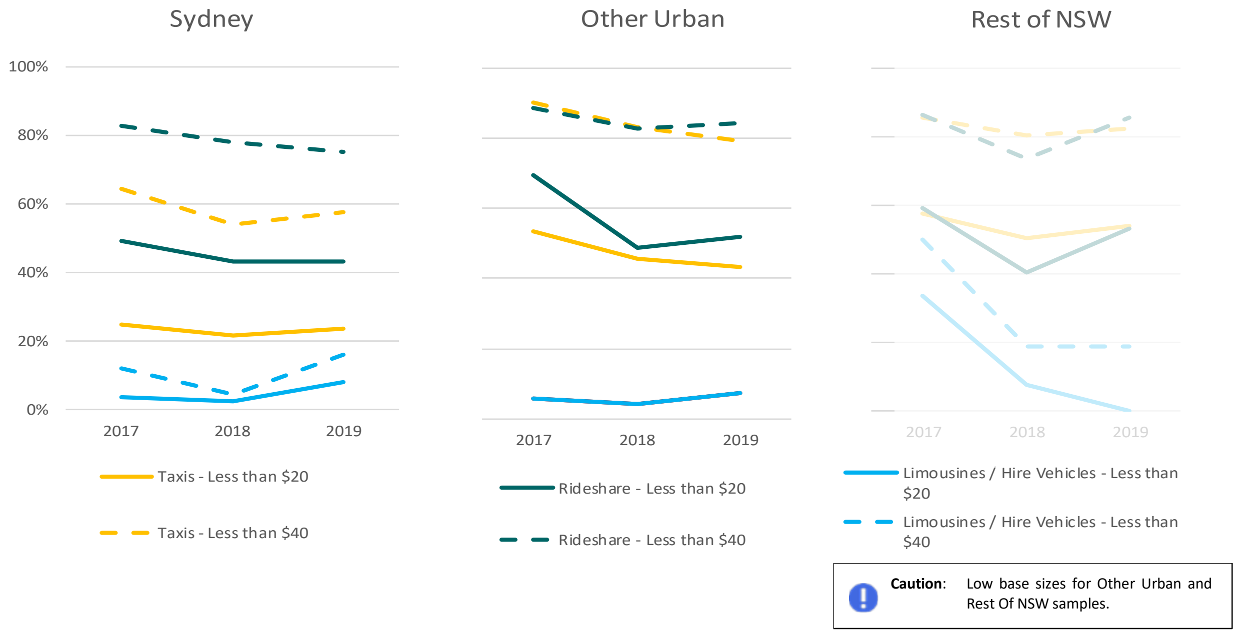
Last trip – Fares Paid *EXCLUDING: Other paid / Can't recall*	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size (after excluding others paid / can't recall)	*380*	*68*	*76*	*480*	*71*	*22*	*38*	*11*	*4**
Less than $20	24%	43%	54%	43%	52%	53%	8%	7%	0%
Less than $40	**58%**	**80%**	**82%**	**75%**	**84%**	85%	16%	7%	19%
$40 or more	42%	20%	18%	25%	16%	15%	**84%**	93%	81%

	Taxi Sydney	Taxi Other Urban	Taxi Rest of NSW	Rideshare Sydney	Rideshare Other Urban	Rideshare Rest of NSW	Limousines Sydney	Limousines Other Urban	Limousines Rest of NSW
Average Fare *Mean of exact $ estimates*	**$48**	**$26**	**$41**	**$30**	**$24**	$24	**$99**	$272	$78
Median # (ie: 50% less costly / 50% more costly)	**$32**	**$20**	**$17**	**$20**	**$18**	$15	**$92**	$240	$90

The median fare is less affected by the small number of extremely high fare estimates reported than is the mean / average.

The tracking charts show that in Sydney, the proportion of rideshare fares that are under $20 and under $40 are considerably higher than the equivalent proportions for taxis. In Other Urban areas these proportions are much more closely aligned.

Figure 77: Last trip – Change in fares paid [Excluding 'others paid / can't recall'] Q59



Fares for point-to-point transport are of course closely tied to length of trip, and so a further breakdown of fares by distance was examined. Sample sizes are very small within individual distance categories, but in Sydney where there were larger total samples a clear pattern can be seen comparing taxi and rideshare fares by estimated length.

Average fare x distance	Taxis	Rideshare
Mean $ estimate	Sydney	Sydney
Less than 5 km	$17	$13
5 km to under 10 km	$40	$23
10 km to under 15 km	$53	$32
15 km to under 25 km	$61	$46
25 km to under 50 km	$97	$76
50 km or more	$117	$116
Total Sample	*359*	*436*

This table shows that Sydney users of rideshare services reported a lower average fare than did users of taxi services, for trips of the same estimated length. This pattern strongly supports (or reinforces) the perception that respondents had that one of the primary advantages of rideshare is the cost or value proposition. A similar pattern was also apparent in previous years.

Sample sizes in other urban areas were too small to consider the data definitively, but even with the small number of cases spread across trip lengths, the same basic pattern of lower costs for rideshare users was strongly suggested.

The detailed breakdown of taxi fares (see next page) shows that respondents whose most recent taxi was by hailing in Sydney reported somewhat lower fares than those who obtained their transport via other methods.

Figure 78: Detailed fare paid by methods of obtaining a taxi Q59

Last trip – Fare paid x method	Taxi		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW
Rank **Average:**	**$53**	**$25**	**$19**
Less than $10	3%	2%	4%
At least $10 and less than $20	14%	33%	24%
At least $20 and less than $30	11%	16%	20%
At least $30 and less than $40	12%	9%	8%
At least $40 and less than $60	9%	7%	0%
At least $60 and less than $100	15%	5%	0%
At least $100 and less than $150	7%	0%	0%
$150 or more	1%	0%	0%
I'm not sure because someone else paid	*10%*	*5%*	*0%*
Can't recall	*19%*	*23%*	*44%*
Sample	198	43	25
Hail **Average:**	**$30**	**$39**	**$42**
Less than $10	1%	0%	0%
At least $10 and less than $20	26%	0%	0%
At least $20 and less than $30	14%	0%	17%
At least $30 and less than $40	7%	29%	0%
At least $40 and less than $60	7%	14%	33%
At least $60 and less than $100	6%	0%	0%
At least $100 and less than $150	2%	0%	0%
$150 or more	0%	0%	0%
I'm not sure because someone else paid	*12%*	*29%*	*33%*
Can't recall	*25%*	*29%*	*17%*
Sample	125	7	6
Called taxi company **Average:**	**$45**	**$22**	**$46**
Less than $10	1%	0%	6%
At least $10 and less than $20	10%	24%	34%
At least $20 and less than $30	15%	18%	12%
At least $30 and less than $40	10%	2%	2%
At least $40 and less than $60	6%	4%	5%
At least $60 and less than $100	15%	2%	4%
At least $100 and less than $150	5%	0%	0%
$150 or more	0%	0%	1%
I'm not sure because someone else paid	*16%*	*18%*	*13%*
Can't recall	*23%*	*33%*	*22%*
Sample	124	51	82
All other methods **Average:**	**$62**	**$65**	**$47**
Less than $10	2%	6%	0%
At least $10 and less than $20	4%	6%	0%
At least $20 and less than $30	9%	17%	20%
At least $30 and less than $40	9%	0%	0%
At least $40 and less than $60	13%	28%	0%
At least $60 and less than $100	13%	6%	40%
At least $100 and less than $150	4%	0%	0%
$150 or more	2%	0%	0%
I'm not sure because someone else paid	*15%*	*11%*	*10%*
Can't recall	*27%*	*28%*	*30%*
Sample	142	18	10

Fare estimates

Reported levels of getting fare estimates for hire vehicles is high, but slightly lower than the levels seen for waiting time estimates. Similar rates of fare estimates were seen in both Sydney and outside of Sydney.

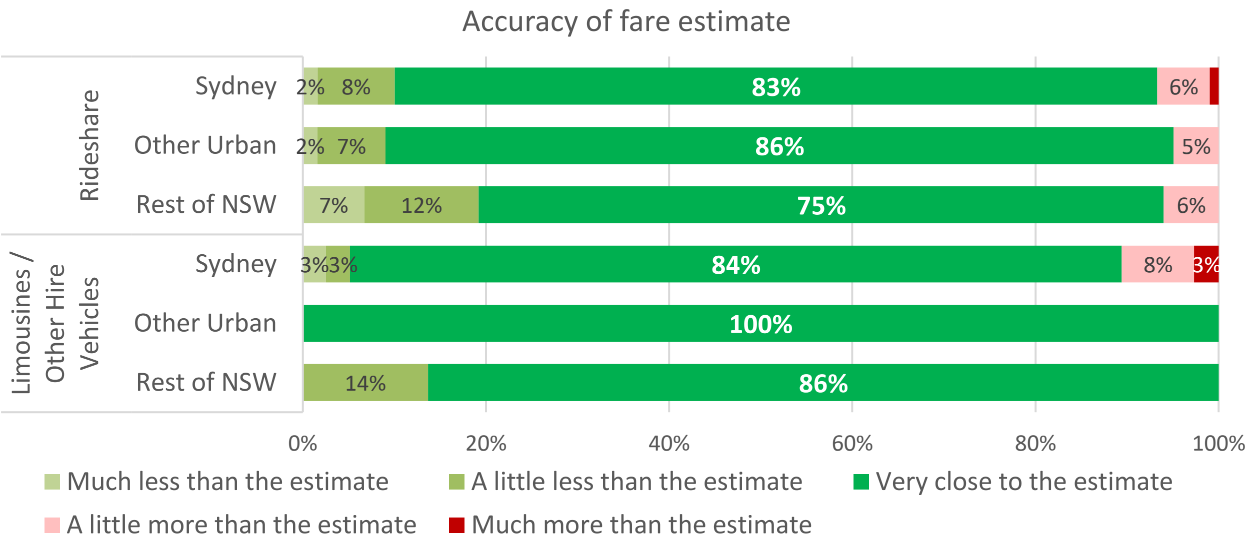
Figure 79: Last trip – Prevalence of being given a fare estimate for hire vehicle bookings Q58

Last trip – Given fare estimate	Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*764*	*122*	*45*	*65*	*22*	*9**
Yes	**82%**	**79%**	**78%**	**58%**	**75%**	**90%**
No	8%	8%	7%	28%	19%	10%
Can't recall	*10%*	*13%*	*15%*	14%	6%	*0%*

While fare estimates are not quite as common, they are still perceived as being more accurate. In Sydney and Other Urban areas there is sufficient sample size for rideshare customers given an estimate to interpret the accuracy results with some confidence. In Sydney 83% of 764 customers said the estimate was *very close to the final fare*, while 86% of 122 customers in other urban areas said the same thing.

Positively, none of the Other Urban customers said the actual fare was *much more*, compared to 3% in 2018. In Sydney, 7% said the fare was more than the estimate in 2019, compared to 12% in 2018.

Figure 80: Last trip – Accuracy of fare estimate for hire vehicle bookings Q60



Base = Last trip within 6 months by hire vehicle and given a fare estimate [Sydney n=38-627; Other Urban n=17-96; Rest of NSW n=8-35]

Comparing fares

Around one-third of ride share users indicated that they compared prices for different hire vehicles prior to booking their trip. In Sydney 29% of rideshare users did, compared to 31% of limousine / other hire vehicle users. In Other Urban areas the comparable figures were 26% and 47%*; while in the Rest of NSW they were 26% and 10%*. Sample sizes outside Sydney are too small and variable across the two waves of the survey for confident interpretation of trends.

Comparing prices on the internet or by using apps was the most common method – being used by close to one-fifth of all respondents who had compared prices.

Around half of rideshare users in Sydney who didn't compare prices indicated that they *always use that provider* and also that *they were happy with the price estimate* – figures that are very close to the previous survey. Of the small group who had used a limousine or other hire vehicle and not compared prices, also as has been the case in previous years, there is a suggestion that they were more likely to be using a regular provider.

Sample sizes for other locations are smaller, but the patterns are broadly similar to Sydney – with the possible exception that rideshare users outside of Sydney may have not shopped around because they were more likely to be happy with the price estimate.

Figure 81: Last trip – Reasons for not comparing fares Q56

Last trip – Reasons for not comparing fares	Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months AND did not compare fares before trip	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*543*	*90*	*33*	*45*	*12**	*8**
Always use provider	45%	42%	36%	64%	75%	13%
Happy with price estimate	57%	61%	64%	22%	25%	33%
Something else	10%	8%	12%	16%	9%	56%

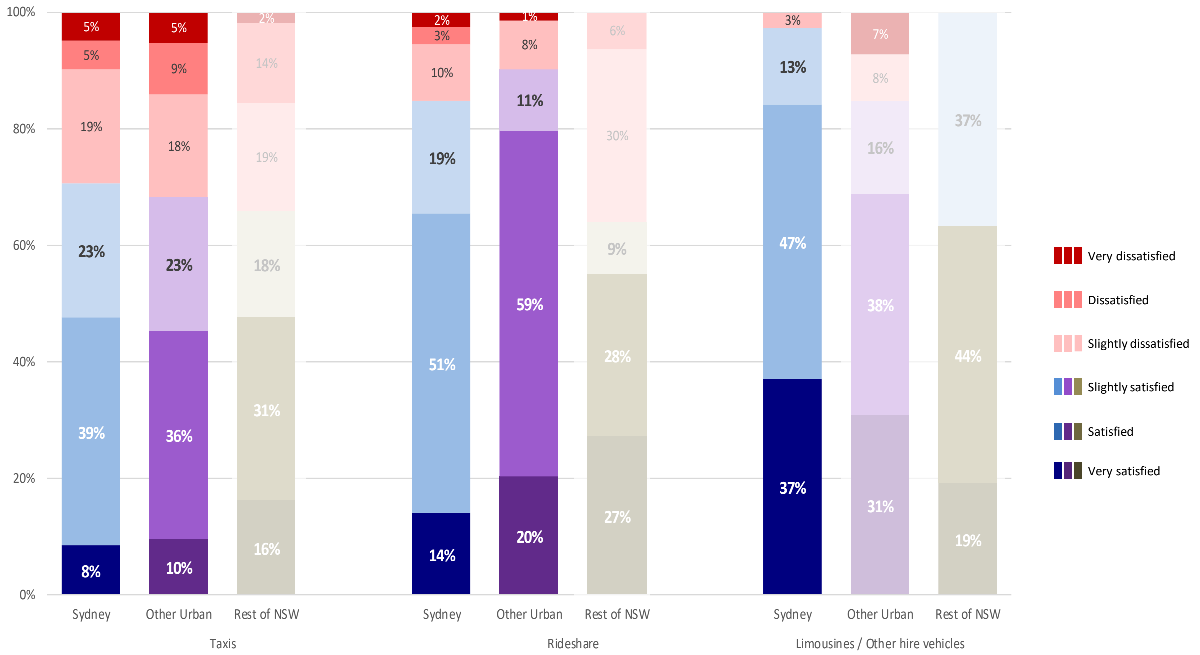
Satisfaction with fares

Consistent with perceptions of the relative cost and value of taxis and rideshare, users of rideshare services are much more satisfied with the fare they paid for their last trip than are users of taxis.

Around 6-in-10 users of taxis considered themselves *at least slightly satisfied* (66%-71% across the three locations). For rideshare, the equivalent figure was 8 or 9-in-10 (85% - 90%), except for in the Rest of NSW (64%, but with a small sample size). The proportion of taxi users who said they were *dissatisfied* or *very dissatisfied* was also considerably higher at 29%-32% compared to less than 15% for rideshare in Sydney or other urban areas.

There were negligible differences in satisfaction with taxi fares between Sydney and other locations for taxis, but satisfaction was if anything a little higher for rideshare users in Other Urban areas. These patterns have been evident in previous years.

Figure 82: Last trip – Satisfaction with fares (if aware of amount) Q61

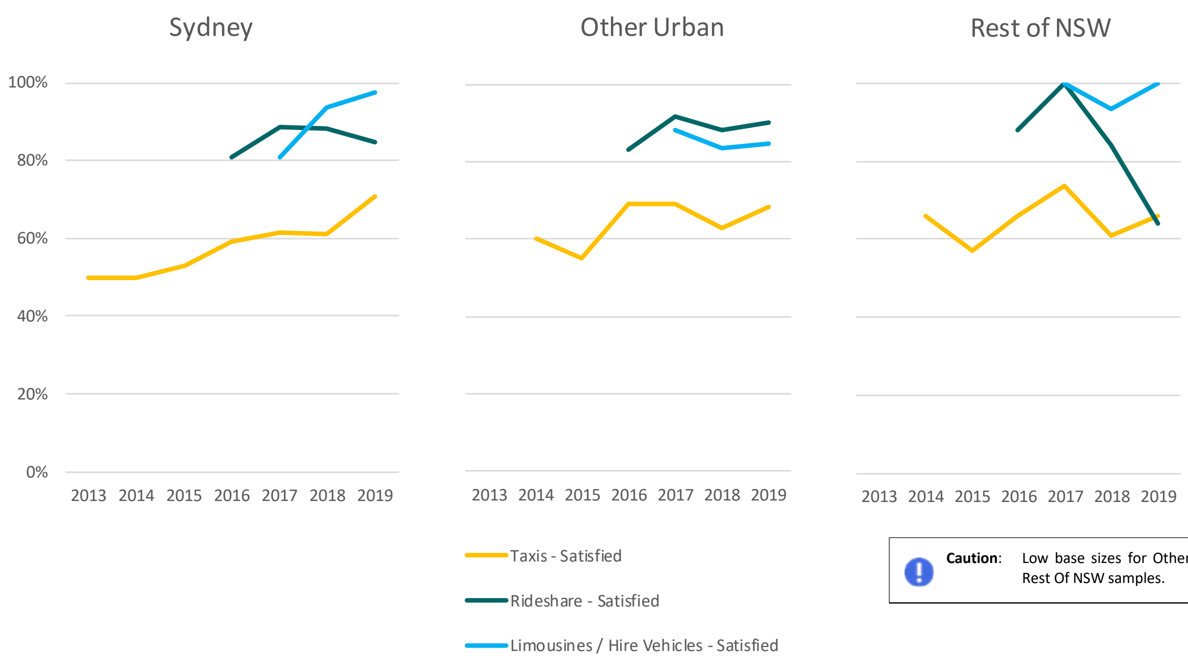


Last trip – Fare Satisfaction	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months AND aware of the amount of fare paid	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*380*	*68*	*76*	*480*	*71*	*22**	*38*	*11**	*4**
Very Satisfied	8%	10%	16%	14%	20%	27%	37%	31%	19%
Satisfied	39%	36%	31%	51%	59%	28%	47%	38%	44%
Slightly satisfied	23%	23%	18%	19%	11%	9%	13%	16%	37%
Total Satisfied	**71%**	**68%**	**66%**	**85%**	**90%**	**64%**	**97%**	**85%**	**100%**
Slightly dissatisfied	19%	18%	19%	10%	8%	30%	3%	8%	0%
Dissatisfied	5%	9%	14%	3%	0%	6%	0%	0%	0%
Very dissatisfied	5%	5%	2%	2%	1%	0%	0%	7%	0%
Total Dissatisfied	**29%**	**32%**	**34%**	**15%**	**10%**	**36%**	**3%**	**15%**	**0%**

Satisfaction with taxi fares, while considerably lower than the equivalent figure for rideshare in all areas, has trended up over the last five years in Sydney, with the reported figure in 2019 being sharply higher at 71%. Satisfaction has also been trending upwards in Other Urban areas, and was also somewhat higher in 2019 than in 2018, though with the smaller sample sizes here more caution is needed in interpreting the year-on-year movements.

There is naturally more fluctuation in the other areas due to the smaller sample sizes, but satisfaction with rideshare fares has been more stable than increasing in the last period (the decline in rideshare far satisfaction in the Rest of NSW is likely due to fluctuations associated with very small sample sizes).

Figure 83: Last trip – Change in satisfaction with fares (if aware of amount) Q61



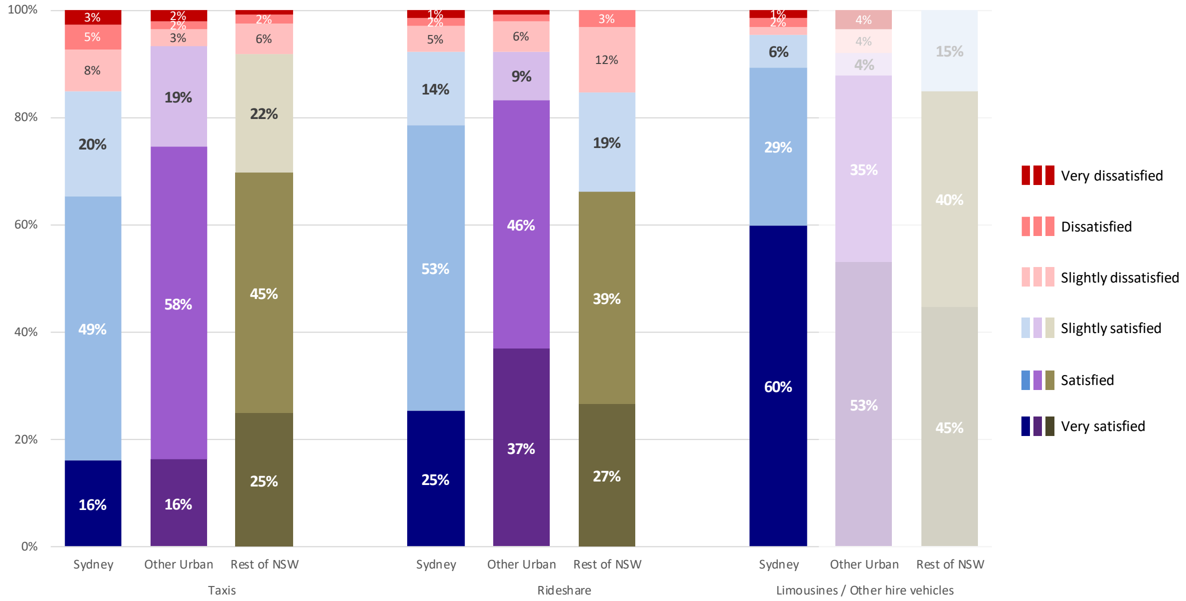
Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Overall Trip Satisfaction

Overall trip satisfaction remains high amongst users, across all locations and service types. In every combination, even where small samples were available, more than 4-in-5 respondents indicated they were *at least slightly satisfied*. This indicates that overall, the point-to-point transport service in NSW is largely meeting the needs and expectations of people who successfully access it.

- Satisfaction with rideshare and limousines / other hire vehicles was slightly higher than for taxis in both Sydney and the rest of NSW.
- There was no systematic pattern in overall trip satisfaction across locations.

Figure 84: Last trip – Overall Satisfaction with last trip Q62

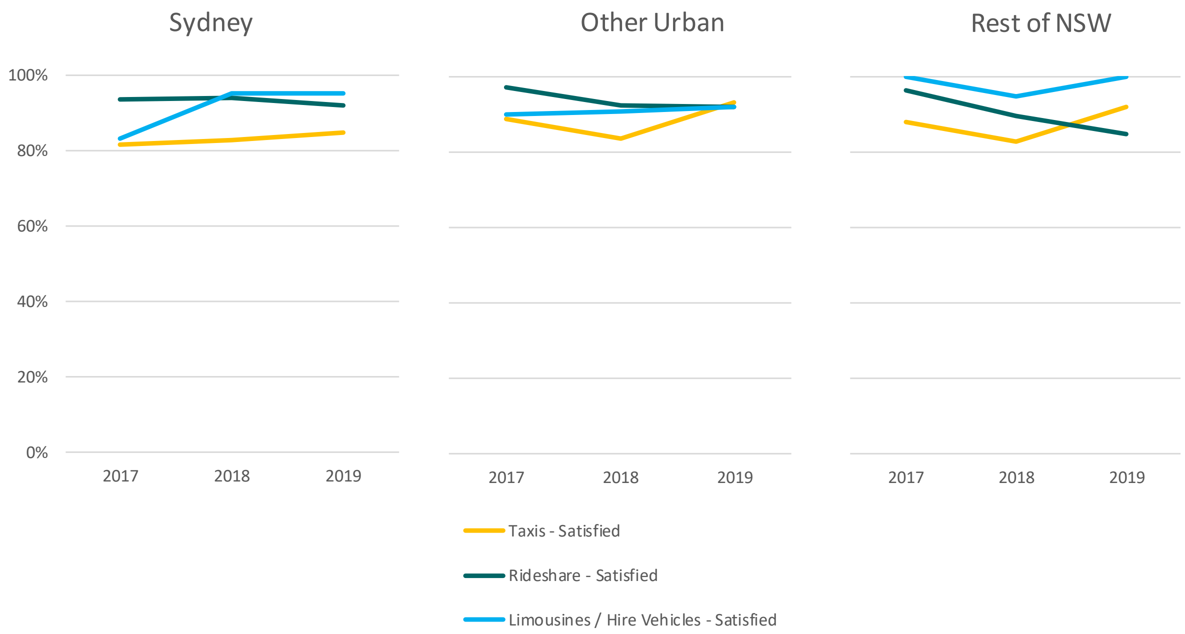


Last trip – Overall Satisfaction	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*596*	*121*	*123*	*764*	*122*	*45*	*65*	*22**	*9**
Very Satisfied	16%	16%	25%	25%	37%	27%	60%	53%	45%
Satisfied	49%	58%	45%	53%	46%	39%	29%	35%	40%
Slightly satisfied	20%	19%	22%	14%	9%	19%	6%	4%	15%
Total Satisfied	**85%**	**93%**	**92%**	**92%**	**92%**	**85%**	**95%**	**92%**	**100%**
Slightly dissatisfied	8%	3%	6%	5%	6%	12%	2%	4%	0%
Dissatisfied	5%	2%	2%	2%	1%	3%	2%	0%	0%
Very dissatisfied	3%	2%	1%	1%	1%	0%	1%	4%	0%
Total Dissatisfied	**15%**	**7%**	**8%**	**8%**	**8%**	**15%**	**5%**	**8%**	**0%**

Overall last trip satisfaction has shown a consistent small advantage for rideshare over taxis in all locations, though this was not the case outside of Sydney in the 2019 survey.

- In Sydney, overall last trip satisfaction with both taxis and rideshare has remained very stable in recent years, though in 2019 the satisfaction of rideshare declined slightly whilst satisfaction with taxis increased, resulting in the smallest gap observed in the last three years.
- In Other Urban areas, all respondents gave very similar satisfaction ratings for all three services. However, while these total *at least slightly satisfied* ratings were equivalent across transport types, greater proportions of rideshare users still gave the higher satisfaction ratings.
- In the Rest of NSW respondents were most satisfied with limousines and whilst still high, were least satisfied with rideshares.

Figure 85: Last trip – Change in overall Satisfaction with last trip Q62

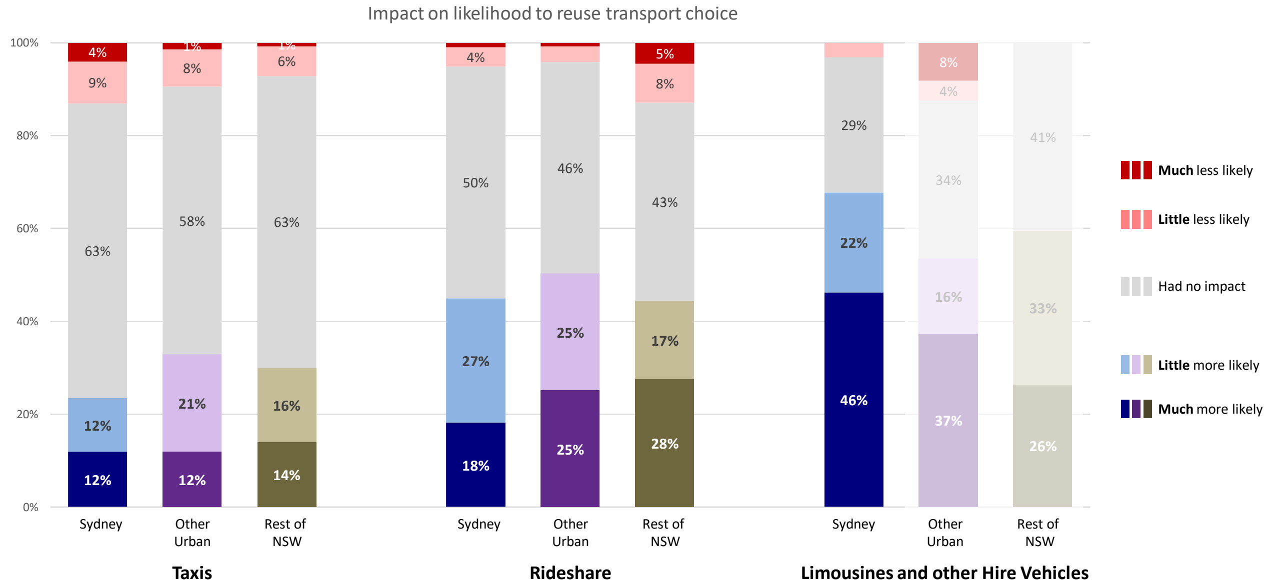


Impact on intended use

Across all transport services and locations, there was a nett positive differential impact on likelihood to re-use the service again in the future – that is, at least as many respondents said the experience made them *more* likely to re-use it as said it made them *less* likely to do so.

Rideshare and limousine or other hire car users tended to find their last experience more reinforcing than did taxi users. About half the rideshare users said the experience made them more likely to use rideshare again (44%-50% across locations), whereas only 24%-33% of taxi users did. At the other end of the experience, 7%-13% of taxi users said their experience made them *less* likely to re-use taxis again, compared to 4%-13% of rideshare users. The dual impact of these is a nett positive differential of +31% to +46% for rideshare, but just +10% to +23% for taxis. This pattern suggests that the growth of rideshare will continue to be driven by a strongly positive feedback loop for users. Similar nett positive differences were also seen for limousine ranging from +41% to +65%, however due to smaller sample sizes, these results need to be treated with some caution.

Figure 86: Last trip – Impact on likelihood to re-use the transport service again Q63



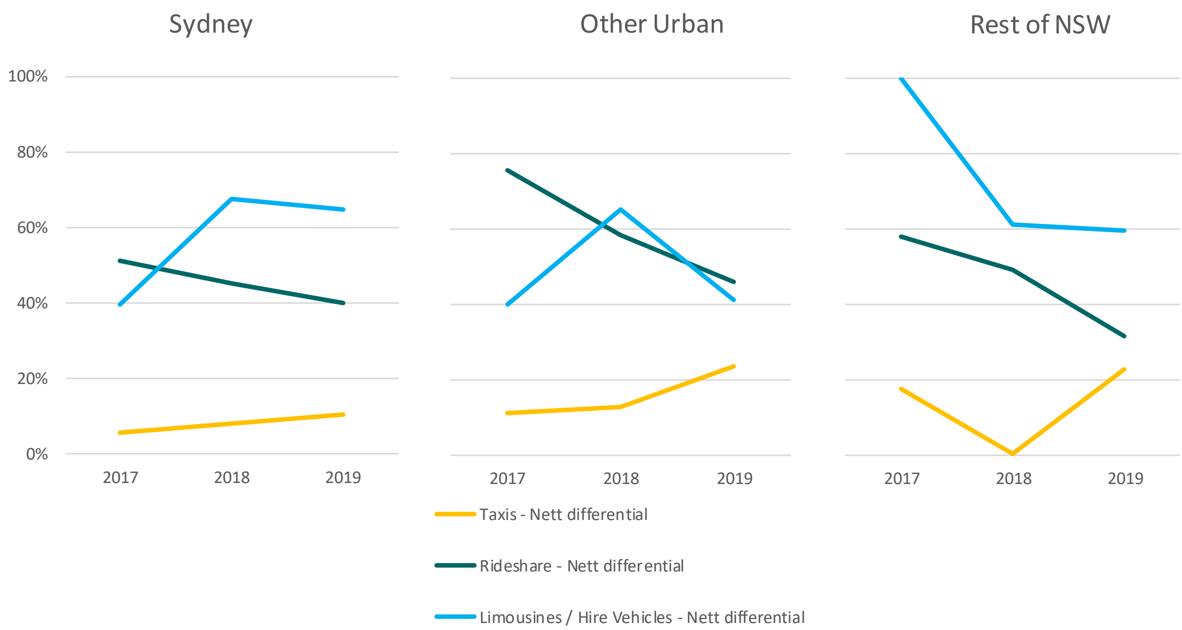
Last trip – Impact on likelihood to re-use transport service again	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*596*	*121*	*123*	*764*	*122*	*45*	*65*	*22**	*9**
Much more likely to use it again	12%	12%	14%	18%	25%	28%	46%	37%	26%
A little more likely to use it again	12%	21%	16%	27%	25%	17%	22%	16%	33%
Total More Likely to Re-Use	**24%**	**33%**	**30%**	**45%**	**50%**	**44%**	**68%**	**53%**	**59%**
Had no impact	63%	58%	63%	50%	46%	43%	29%	34%	41%
A little less likely to use it again	9%	8%	6%	4%	3%	8%	3%	4%	0%
Much less likely to use it again	4%	1%	1%	1%	1%	5%	0%	8%	0%
Total Less Likely to Re-Use	13%	9%	7%	5%	4%	13%	3%	12%	0%
Differential Impact *Total MORE likely minus Total LESS likely*	**+10%**	**+23%**	**+23%**	**+40%**	**+46%**	**+31%**	**+65%**	**+41%**	**+59%**

Whilst rideshare has consistently had a much higher nett positive differential score in terms of impact on likely re-use compared to taxis, in all areas the strength of the pattern declined to some extent in 2019. At the same time, in all areas the nett differential impact of taxi experiences was slightly stronger. Compared to previous years, the strong effect of rideshare use promoting greater and greater use does not seem as strong in 2019, which fits the trend observed for growth in usage in the last 12 months to have slowed.

The impact of experiences with limousines and other hire vehicles continues to vary widely, though given the relatively small cohorts who had that experience and the likely more diverse type of use these vehicles may have, it is difficult to interpret these three years of quite different observations.

Further monitoring of these results will be necessary to disentangle the underlying story they may represent. However, the pattern of results across taxi and rideshare is indicative of the very strong growth phase of rideshare starting to flatten out.

Figure 87: Last trip – Change in impact on likelihood to re-use the transport service again Q63

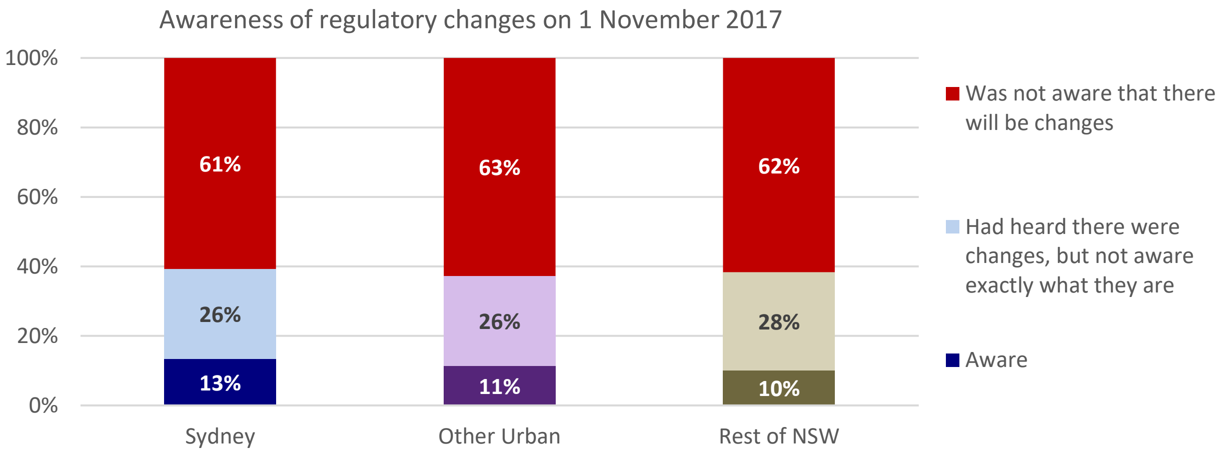


G. Awareness of Regulatory Changes

Awareness of the regulatory changes that occurred on 1 November 2017 was slightly higher than it had been just prior to the changes, but is still very low. 13% of respondents from Sydney felt they were aware of the changes having happened, and 10%-11% in the other locations. These figures were in line with those in 2018. Around one-quarter of respondents in all locations had heard that there were changes but weren't aware of exactly what they were.

However, overall, a majority of respondents in all locations (61%-63%) said they were just not aware of changes having been made to the way fares and services were regulated for taxis and hire vehicles.

Figure 88: Awareness of regulatory changes on 1 November 2017 Q69



Base = All respondents [Sydney n=1903; Other Urban n=314; Rest of NSW n=174]

Even amongst those who said they knew of regulatory changes having happened, 6%-17% were not aware of any of the actual changes that occurred, and so too were about half of those who *thought they had heard something*. The facet with the highest level of awareness was providers of all booked trips being required to give a fare estimate before starting a trip, but each of the others had a similar moderately-low level of awareness.

Figure 89: Regulatory changes that respondents were at least somewhat aware of Q70

	Sydney		Other Urban		Rest of NSW	
	Aware	Had heard of some changes	Aware	Had heard of some changes	Aware	Had heard of some changes
Booked trips in **taxis** no longer subject to maximum fare regulation	32%	10%	33%	9%	56%	12%
All providers of booked trips in **taxis** or **hire vehicles** have to give a fare estimate before starting a trip	38%	26%	22%	22%	35%	16%
Rank and hail **taxi** trips remain subject to maximum fares set by the Government	22%	12%	17%	14%	6%	6%
Rank and hail trips can still only be undertaken by **taxis**	24%	18%	22%	21%	11%	16%
None of these	17%	46%	28%	44%	6%	53%
Sample size	*254*	*493*	*36*	*81*	*17*	*49*

Appendix A: Questionnaire

INTRODUCTORY TEXT

Who is conducting the survey?

This research is being conducted for the NSW Government by ORIMA Research and the ORU.

How long will the survey take?

This survey should take around 10 minutes to complete (depending on what comments you include when invited to provide additional information).

Is my participation voluntary?

Participation in this research is voluntary. You can choose not to answer any question. You can decide to stop at any time.

Is my confidentiality and information privacy ensured?

The information you provide will be treated as private and confidential. No individual will be able to be identified from the research results. Your answers will only be used for the purposes of the research.

At any time during or after the survey, you can ask that the information you provided not be used by ORIMA Research.

PART 1: QUOTA DEMOGRAPHICS

1. **What is your gender?**
   (1) Male
   (2) Female
   (3) Other
   (4) Prefer not to say

2. **Which age group are you in?**
   (1) Under 16 TERMINATE
   (2) 16 to19
   (3) 20 to 29
   (4) 30 to 39
   (5) 40 to 49
   (6) 50 to 59
   (7) 60 to 69
   (8) 70 to 79
   (9) 80 and over

3. **What is the postcode where you live?**

NUMERIC (4 DIGITS ONLY)

Use postcode to set [LOCATION] variable to Sydney, Wollongong, Newcastle, Gosford or Wyong, or "your local region".

4. **Which of these describe you?** ***Please select all that apply***

MULTIPLE RESPONSE

   (1) Working full-time
   (2) Working part-time
   (3) Full-time student
   (4) Part-time student
   (5) Unemployed
   (6) Household duties / caring for children
   (7) Retired
   (8) Disability / defence veteran or aged pensioner
   (9) Other

PART 2: AWARENESS AND USAGE OF SERVICES

This survey is about a range of transport options that you may use in [LOCATION].

ASK ALL

5. A "**taxi"** is a vehicle clearly marked as a taxi and with a TAXI or CAB sign on its roof. Are you aware of **taxis** operating in [LOCATION]?
   (1) Yes
   (2) No
   (3) Unsure

ASK IF AWARE OF TAXIS (IE: Q5 = 1)

6. When was the last time you used a **taxi** in [LOCATION]?
   (1) In the last 6 months
   (2) 7-12 months ago
   (3) Longer ago
   (4) Never
   (5) Can't recall

ASK ALL

7. Overall, [INSERT IF Q6=4-5 "even if you don't use the service"], how satisfied or dissatisfied are you with the **taxi** service in [LOCATION]?
   (1) Very satisfied
   (2) Satisfied
   (3) Neither satisfied nor dissatisfied
   (4) Dissatisfied
   (5) Very dissatisfied
   (6) Don't know

ASK ALL

There are several types of "**hire vehicle services"** that operate in NSW. Hire vehicle services **do not** include taxis, or rental cars that you can drive yourself. Hire vehicle services provide a passenger service to transport you by a motor vehicle from one point to another for the payment of a fare. They include rideshare services, limousines and other hire vehicle services such as airport shuttles in smaller vehicles.

8. Are you aware of any of the following types of **hire vehicle** services operating in [LOCATION]?

		Yes	No	Unsure
A	**Rideshare** services like Uber, Go Buggy, Ola or Bolt	1	2	3
B	**Limousines** or **other hire vehicle services**	1	2	3

ASK IF AWARE OF ANY IN Q8 / SHOW ONLY THOSE AWARE OF IN Q8

9. When was the last time you used any of the following types of **hire vehicle** services in [LOCATION]?

		In the last 6 months	7-12 months ago	Longer ago	Never	Can't recall
A	**Rideshare service** (eg: Uber, Go Buggy, Ola, Bolt)	1	2	3	4	5
B	**Limousines** or **other hire vehicle service**	1	2	3	4	5

ASK ALL

10. Across these different types of **hire vehicle** services – overall [INSERT IF Q9A OR B=4-5 ", even if you don't use this type of service,"] how satisfied or dissatisfied are you with the service in [LOCATION]?

		Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Don't know
A	**Rideshare** services (eg: Uber, Go Buggy, Ola, Bolt)	1	2	3	4	5	6
B	**Limousines** or **other hire vehicles service**	1	2	3	4	5	6

ASK ALL

There are several <u>other</u> types of **transport services** that are available in some parts of NSW. These types of transport are **not** considered 'hire vehicles'.

11. Are you aware of any of the following types of **transport services** operating in [LOCATION]?

		Yes	No	Unsure
A	**Community transport** - government-subsidised door to door transport available to eligible people experiencing transport disadvantage. A user charge generally applies.	1	2	3
B	**Courtesy Transport** - transport provided by pubs, clubs or community organisations (eg, Lions, Rotary and churches) which is free of charge.	1	2	3
C	**Car share** – a membership based service where people can rent vehicles to drive themselves for short periods of time (e.g. GoGet, Car Next Door).	1	2	3
D	**Bikeshare** – where you can make short-term use of push-bikes, either for free or for a small cost	1	2	3

ASK IF AWARE OF ANY IN Q11 / SHOW ONLY THOSE AWARE OF [Q11 = 1]

12. When was the last time you used any of the following types of **transport services** in [LOCATION]?

		In the last 6 months	7-12 months ago	Longer ago	Never	Can't recall
A	**Community transport** - government-subsidised door to door transport available to eligible people experiencing transport disadvantage. A user charge generally applies.	1	2	3	4	5
B	**Courtesy Transport** - transport provided by pubs, clubs or community organisations (eg, Lions, Rotary and churches) which is free of charge.	1	2	3	4	5
C	**Car share** – a membership based service where people can rent vehicles to drive themselves for short periods of time (e.g. GoGet, Car Next Door).	1	2	3	4	5
D	**Bikeshare** – where you can make short-term use of push-bikes, either for free or for a small cost	1	2	3	4	5

ASK IF USED TAXIS (Q6=1) OR ANY FORM OF HIRE VEHICLE (Q9A OR B=1)

SHOW ONLY TYPES OF TRANSPORT USED IN THE LAST 6 MONTHS

13. In the last 6 months, on average how many times have you used these types of transport to get around [LOCATION]?

		6 or more times per week	3-5 times per week	1-2 times per week	2-3 times per month	Once every month	Less often	Can't say
A	**Taxis**	1	2	3	4	5	6	7
B	**Rideshare services** (eg: Uber, Go Buggy, Ola, Bolt)	1	2	3	4	5	6	7
C	**Limousines** or **other hire vehicle services**	1	2	3	4	5	6	7

ASK ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

14. In the last 6 months, have you had any experiences where you **tried to use** these types of transport services in [LOCATION] but were **not able to**?

		Yes	No
A	**Taxis**	1	2
B	**Rideshare services** (eg: Uber, Go Buggy, Ola, Bolt)	1	2
C	**Limousines** or **other hire vehicle services**	1	2

ASK IF YES TO ANY IN Q14 / SHOW ONLY OPTIONS WITH CODE 1 IN Q14

15. On the last occasion you were unable to use [INSERT APPROPRIATE TEXT: "a taxi" OR "a rideshare service" OR "a limousine or other hire vehicle service" OR "a taxi or rideshare service" OR "a taxi or a limousine or other hire vehicle service" OR "a rideshare service, limousine or other hire vehicle service" OR "a taxi, rideshare service, limousine or other hire vehicle service"] what did you do instead? *Please select all that apply*

MULTIPLE RESPONSE

	A	B	C
	The last time you couldn't use a **taxi**	The last time you couldn't use a **rideshare service**	The last time you couldn't use a **limousine or other hire vehicle service**
Decided not to make the journey at all	1	1	1
Took a train	2	2	2
Took a regular bus (ie, not a courtesy bus)	3	3	3
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	4	4	4
Used courtesy transport provided by a venue such as a pub or club	5	5	5
Drove myself or got a lift	6	6	6
Used a rideshare service instead	7	7	7
Used a limousine or other hire vehicle service	8	8	8
Used a taxi instead	9	9	9
Walked or cycled	10	10	10
Used a bikeshare service	14	14	14
Used a car sharing service such as GoGet or Car Next Door	11	11	11
Something else	12	12	12
Can't recall	13	13	13

** **NOTE**: PEOPLE WHO ARE NOT AWARE OF TAXI [Q5=2-3] / HV SERVICES [Q9A AND B = 2-3] OR WHO HAVE NEVER USED THEM [Q6=4-5 AND Q9A AND B =4-5]: SKIP FROM HERE TO q20/21; AND THEN TO PART 4 (WORKPLACE POLICIES, Q32-33-34); AND THEN TO PART 6 (STRENGTHS AND WEAKENESSES, Q64 OWNARDS)**

PART 3: TAXIS AND HIRE VEHICLES GENERALLY

SHOW ONLY TYPES OF TRANSPORT EVER USED [Q6=1-3 or Q9A or B=1-3]

16. For each of the following – to get around [LOCATION] in the last 12 months, have you:

		Used them **more** than in the previous 12 months	Used them about the **same**	Used them **less** than in the previous 12 months	Can't say
A	**Taxis**	1	2	3	4
B	**Rideshare** services (eg: Uber, Go Buggy, Ola, Bolt)	1	2	3	4
C	**Limousines** or **other hire vehicle services**	1	2	3	4

SHOW IF EVER USED TAXIS (Q6=1-3) AND USED HVs IN LAST 6 MONTHS (either Q9A OR B=1)

17. As a result of using [INSERT APPROPRIATE TEXT: "rideshare services" OR "limousines or other hire vehicle services" OR "rideshare services, limousines or other hire vehicle services", do you use **taxis** to get around [LOCATION]…
    (1) Not at all any more
    (2) A lot less
    (3) A little less
    (4) About as frequently as before
    (5) More

ASK IF USED TAXIS OR HIRE VEHICLES MORE OFTEN IN THE LAST 12 MONTHS (Q16A/B/C=1)

18. You said you have used [INSERT APPROPRIATE TEXT: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"] more often in the last 12 months than the previous 12 months to get around [LOCATION]. Why is that? *Please select all that apply*

MULTIPLE RESPONSES ALLOWED / SHOW ONLY OPTIONS USED MORE IN Q16 [IE: CODE 1]

	A	B	C
	Why have you used **taxis** more often in the last 12 months	Why have you used **rideshare services** more often in the last 12 months	Why have you used **limousines or other hire vehicles** more often in the last 12 months
I find them less expensive than before	1	1	1
I have more disposable income	2	2	2
I'm going out more / needing to get around more	3	3	3
Because I don't have to wait as long to catch one, or I think one is more likely to turn up after I have booked it	4	4	4
I have less access to alternatives	5	5	5
Because the service for booking taxis over the phone has improved	6	6	6
Because it has become easier to book taxis with apps than it was	7	7	7
Because the service for booking is better than it used to be	8	8	8
I think drivers have become less inclined to take longer routes or overcharge me	9	9	9
Because I get a fare estimate quoted in advance	10	10	10
I have found that driver behaviour and knowledge has improved in [LOCATION, IF NOT A SPECIFIED CITY INSERT "my local region"]	11	11	11
Because they were not available previously or I did not know about them before then	12	12	12
For another reason	13	13	13

ASK IF USED TAXIS OR HIRE VEHICLES LESS OFTEN IN THE LAST 12 MONTHS (Q16A/B/C=3)

19. You said you have used [INSERT APPROPRIATE TEXT: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"] less often in the last 12 months than the previous 12 months to get around [LOCATION]. Why is that? *Please select all that apply*

MULTIPLE RESPONSES ALLOWED / SHOW ONLY OPTIONS USED LESS IN Q16

	A	B	C
	Why have you used **taxis** less often in the last 12 months	Why have you used **rideshare services** less often in the last 12 months	Why have you used **limousines or other hire vehicles** less often in the last 12 months
I find them more expensive than before	1	1	1
I have less disposable income	2	2	2
Because peak or surge pricing makes them too expensive	3	3	3
I'm going out less / have less need to get around	4	4	4
Because I find I have to wait longer than I used to catch a one, or I can't rely on one turning up after I have booked it	5	5	5
I have better access to a car	6	6	6
Public transport has improved when I need it	7	7	7
I use taxis instead	8	8	8
I use limousine or other hire vehicle services instead	9	9	9
I use rideshare services instead	10	10	10
I use car share, community transport or courtesy buses instead	11	11	11
Because booking services have become worse	12	12	12
I think drivers have become more inclined to take longer routes or overcharge me	13	13	13
I have found that driver behaviour and knowledge has become worse in [LOCATION, IF NOT A SPECIFIED CITY INSERT "my local region"]	14	14	14
For another reason	15	15	15

ASK Q20/21 FOR ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

20. What do you think of the **value for money** for fares to use [INSERT APPROPRIATE TEXT OPTION: “taxis” OR “rideshare services” OR “limousines or other hire vehicle services” OR “taxis or rideshare services” OR “rideshare services, limousines or other hire vehicle services” OR “taxis, rideshare services, limousines or other hire vehicle services”] in [LOCATION]?

SHOW OPTIONS AWARE OF / SHOW ALL ON ONE SCREEN

		Value of **taxis**			
		Good	OK	Poor	Can’t say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

		Value of **rideshare** services (eg: Uber, Go Buggy, Ola, Bolt)			
		Good	OK	Poor	Can’t say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

		Value of **limousines** or **other hire vehicle services**			
		Good	OK	Poor	Can’t say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

21. What do you think of the **value for money** for fares to use [INSERT APPROPRIATE TEXT OPTION: “taxis” OR “rideshare services” OR “limousines or other hire vehicle services” OR “taxis or rideshare services” OR “rideshare services, limousines or other hire vehicle services” OR “taxis, rideshare services, limousines or other hire vehicle services”] in [LOCATION]?

SHOW OPTIONS AWARE OF / SHOW ALL ON ONE SCREEN

		Value of **taxis**			
		Good	OK	Poor	Can’t say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

		Value of **rideshare** services (eg: Uber, Go Buggy, Ola, Bolt)			
		Good	OK	Poor	Can't say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

		Value of **limousines or other hire vehicle services**			
		Good	OK	Poor	Can't say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

SHOW IF USE TAXIS (Q6=1) AND / OR HIRE VEHICLES (Q9A OR B=1) IN THE LAST 6 MONTHS

22. What methods have you used (or tried to use) to get ["taxis" OR "rideshare services" OR "limousines or other hire vehicle services" OR "taxis or rideshare services" OR "rideshare services, limousines or other hire vehicle services" OR "taxis, rideshare services, limousines or other hire vehicle services"] in the last 6 months in [LOCATION]?

MULTIPLE RESPONSE / SHOW ONLY OPTIONS USED IN LAST 6 MONTHS

		Pre-booking for a particular time or at least 15 minutes ahead (including regular bookings)	Booking – to come as soon as possible (including 'next available')	From a rank	By hailing in the street
A	**Taxis**	1	2	3	4
B	**Rideshare services** (eg: Uber, Go Buggy, Ola, Bolt)	1	2		
C	**Limousines or other hire vehicle services**	1	2		

ASK IF USED / TRIED TO USE RANK OR HAIL TO GET TAXIS IN LAST 6 MONTHS (Q22A=3-4)

23. When you try to get a **taxi** at a rank or to hail one in the street – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET TAXIS IN LAST 6 MONTHS (Q22A=2)

24. When you try to get a **taxi** by booking one to come as soon as possible (including 'next available' bookings) – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET RIDESHARE IN LAST 6 MONTHS (Q22B=2)

25. When you try to use a **rideshare service** by booking one to come as soon as possible – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET LIMO / OTHER HV LAST 6 MTHS (Q22C=2)

26. When you try to use **limousines or other hire vehicle services** by booking one to come as soon as possible – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE RANK OR HAIL TO GET TAXIS IN LAST 6 MONTHS (Q22A=3-4)

27. What impact, if any, would it have on you if there was a **minimum fare** in [LOCATION] for any **taxi** caught from a rank or by hailing it in the street of…

		I would be **much less** likely to use ranks or hail a taxi	I would be **a little less** likely to use ranks or hail a taxi	It would make **no difference** to how often I would use a rank or hail a taxi	Can't say
A	$5	1	2	3	4
B	$7.50	1	2	3	4
C	$10	1	2	3	4
D	$12.50	1	2	3	4

ASK IF USED TAXIS (Q6=1-2) OR HIRE VEHICLES (Q9A OR B=1-2) IN LAST 12 MONTHS

28. In the past 12 months, which – if any – of the following **problems** have <u>you personally experienced</u> using [INSERT APPROPRIATE TEXT OPTION: “**taxis”** OR **“rideshare services”** OR **“limousines or other hire vehicle services**” OR **“taxis or rideshare services”** OR **“rideshare services, limousines or other hire vehicle services”** OR **“taxis, rideshare services, limousines or other hire vehicle services**”]?

MULTIPLE RESPONSE / IF CODE 10 SELECTED CANNOT SELECT ANY OTHER CODE IN **COLUMN**

SHOW OPTIONS USED IN LAST 12 MONTHS

	A	B	C
	Using **Taxis**	Using **Rideshare services**	Using **Limousines or other hire vehicle services**
Difficulty getting one at a major event (ie: had to wait an unreasonably long time, or unable to get one at all)	11	11	11
I couldn’t get one when I wanted one some other time	1	1	1
I was overcharged	2	2	2
The driver did not take the most direct route	3	3	3
The driver did not know where they were going	4	4	4
The driver refused to take me somewhere after I told them where I was going	5	5	5
I felt unsafe because of the way the driver was driving, or the driver was breaking the road rules	6	6	6
The driver was rude, unhelpful, or offensive	7	7	7
The price during peak or surge pricing was too high	8	8	8
Something else	9	9	9
Had no problems	10	10	10

ASK IF SELECT SOMETHING ELSE CODE 9 IN Q28

29. What other problems did you experience…. SHOW IF CODE 9 SELECTED IN Q28

A	B	C
Using **Taxis**	Using **Rideshare services**	Using **Limousines or other hire vehicle services**
TEXT BOX	TEXT BOX	TEXT BOX

ASK IF USED TAXIS (Q6=1-2) OR HIRE VEHICLES (Q9A OR B=1-2) IN LAST 12 MONTHS

30. The last time you tried to use [INSERT APPROPRIATE TEXT OPTION BASED ON ANY ATTEMPT TO USE METHODS: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"], what happened?

	A	B	C
	Last time trying to use a **taxi**	Last time trying to use a **rideshare**	Last time trying to use a **limousine** or **other hire vehicle service**
I was able to get one	1	1	1
It didn't turn up after I had booked it	2	2	2
No taxi came to the rank	3		
No taxi was available to hail on the street	4		
Can't recall	5	5	5

ASK ONLY IF ANY CODE 2-4 IN Q30 AND MATCHING CODE 2 IN Q14 [IE: Q14A=2 AND Q30A=2-4; OR Q14B=2 AND Q30B=2; OR Q14C=2 AND Q30C=2]

31. When you were unable to use a [INSERT APPROPRIATE TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**" OR "**taxi or rideshare service**" OR "**rideshare service, limousine or other hire vehicle service**" OR "**taxi, rideshare service, limousine or other hire vehicle service**"], what did you do instead?

MULTIPLE RESPONSE / SHOW OPTIONS WHERE CODE 2-4 SELECTED IN Q30

PROG NOTE: NOTE THAT TEXT INSERT OPTIONS IN THE QUESTION WORDING ARE SINGULAR, NOT PLURAL AS IN MOST OTHER QUESTIONS

	A	B	C
	Last time trying to use a **taxi**	Last time trying to use a **rideshare service**	Last time trying to use a **limousine** or **other hire vehicle service**
Decided not to make the journey at all	1	1	1
Took a train	2	2	2
Took a regular bus (ie, not a courtesy bus)	3	3	3
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	4	4	4
Used courtesy transport provided by a venue such as a pub or club	5	5	5
Drove myself or got a lift	6	6	6
Used a rideshare service instead	7	7	7
Used a limousine or other hire vehicle service	8	8	8
Used a taxi instead	9	9	9
Walked or cycled	10	10	10
Used a bikeshare service	13	13	13
Used a car sharing service such as GoGet or Car Next Door	11	11	11
Something else	12	12	12

PART 4: WORKPLACE POLICY

ASK IF EMPLOYED (Q4=1-2)

ASK EVEN IF NOT AWARE OF OR USE ANY TRANSPORT SERVICES

32. Does your workplace at least sometimes pay for staff to travel for work-related purposes using:

		Yes	No	Don't know
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle services** (eg: Uber, Go Buggy, Ola, Bolt)	1	2	3

ASK ONLY IF CODE 1 TO AT LEAST ONE IN Q32

33. In the last 12 months, has your employer: SHOW ONLY OPTIONS SELECTED IN Q32

		Allowed staff to use this service more than in previous years	Required staff to use this service less than in previous years	Made no changes to policy or preference that you know of
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle** services (eg: Uber, Go Buggy, Ola, Bolt)	1	2	3

ASK ONLY IF CODE 1 TO AT LEAST ONE IN Q32

34. Thinking about staff using **taxis** or **any rideshare, limousine or other hire vehicle** services (eg: Uber, Go Buggy, Ola, Bolt)… does your workplace:
    (1) Have a **policy** to only use **taxis**
    (2) Have a **preference** for **taxis**
    (3) Have **no** preference or policy either way
    (4) Have a **preference** for **any rideshare, limousine or other hire vehicle** services
    (5) Have a **policy** to only use **any rideshare, limousine or other hire vehicle** services
    (6) Don't know

PART 5: LAST TRIP SECTION – BASED ON LAST TRIP

IF NOT USED A TAXI IN THE LAST 6 MONTHS (Q6=2-5) OR ANY HIRE VEHICLE IN THE LAST 6 MONTHS (Q9A OR B=2-5) THEN SKIP TO Q64

SHOW IF USED TAXI IN LAST 6 MONTHS (Q6=1) BUT NOT ANY HIRE VEHICLE (Q9A OR B=2-5)

Please now think about just your **very last trip** in a **taxi**.

SHOW IF USED A RIDESHARE IN LAST 6 MONTHS (Q9A=1) BUT NOT LIMOUSINE OR OTHER HIRE VEHICLE SERVICE (Q9B=2-5) OR A TAXI (Q6=2-5)

Please now think about just your **very last trip** using **a rideshare** service.

SHOW IF USED A LIMOUSINE OR OTHER HIRE VEHICLE SERVICE IN LAST 6 MONTHS (Q9B=1) BUT NOT RIDESHARE (Q9A=2-5) OR A TAXI (Q6=2-5)

Please now think about just your **very last trip** using a **limousine or other hire vehicle service**.

ASK IF USED BOTH RIDESHARE (Q9A=1) AND A LIMOUSINE OR OTHER HIRE VEHICLE SERVICE (Q9B=1) IN LAST 6 MONTHS BUT NOT A TAXI (Q6=2-5)

35. Please think now about just your **very last** trip. Was that last trip using:
    (1) A **rideshare** service
    (2) A **limousine** or **other hire vehicle**

ASK IF USED BOTH TAXIS (Q6=1) AND ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

ONLY SHOW CODE 2 IF Q9A=1 / ONLY SHOW CODE 3 IF Q9B=1

36. Was your very last trip :
    (1) Using a **taxi**
    (2) Using a **rideshare** service
    (3) Using a **limousine** or **other hire vehicle service**

ASK IF LAST TRIP WAS A RIDESHARE [Q36 = 2]

36A. Did you use a ‘pooled’ rideshare facility for that last trip (ie: where you share the costs with someone else who is doing a similar trip at the same time)?
    (1) Yes
    (2) No
    (3) Unsure / can’t recall

37. Which of these best describes the type of place **where** you were picked up and dropped off for that very last trip?

	Pick up location SINGLE RESPONSE	**Drop off location** SINGLE RESPONSE
A private home or apartment	☐1	☐1
A workplace or office	☐2	☐2
A shop or shopping centre	☐3	☐3
A pub, club or other similar type of location	☐4	☐4
In a CBD, town centre or other busy area	☐5	☐5
At an event	☐6	☐6
At an airport	☐7	☐7
At a train station or other transport connection	☐8	☐8
Hospital or medical facility	☐9	☐9
Somewhere else: Please describe __________	☐10	☐10

38. What **day and time** were you picked up? *Please select ONE time period only. Note that after midnight is the morning of the following day*

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Early morning - midday	☐12	☐22	☐32	☐42	☐52	☐62	☐72
Midday-6pm	☐13	☐23	☐33	☐43	☐53	☐63	☐73
6pm-10pm	☐14	☐24	☐34	☐44	☐54	☐64	☐74
10pm-midnight	☐15	☐25	☐35	☐45	☐55	☐65	☐75
After midnight	☐21	☐31	☐41	☐51	☐61	☐71	☐11

Peak weekend period

39. What was your **main purpose** in taking your most recent trip?

SINGLE RESPONSE

(1) Work-related (including getting home from work)
(2) Getting to or from appointments
(3) Getting to or from the shops
(4) Socialising or recreation (including getting back home)
(5) Moving items from one place to another
(6) For education purposes
(7) Something else

40. What were the reasons you used a [INSERT TEXT: **“taxi”** OR **“rideshare service”** OR **“limousine or other hire vehicle service”**] for this journey instead of other transport options or driving yourself?

	Main reason SINGLE RESPONSE	**Other reasons** MULTIPLE RESPONSE
Quicker to get / shorter waiting time	☐1	☐1
Quicker or more direct travel time	☐2	☐2
More convenient than driving (for example, I didn’t have to worry about parking, I had luggage, it was raining and I didn’t want to get wet, I was drinking)	☐3	☐3
More convenient than other paid transport options I could have used	☐4	☐4
Cheaper than alternatives	☐5	☐5
More reliable than alternatives	☐6	☐6
Makes different types of vehicle (like a van, ute or luxury car) available	☐7	☐7
I didn’t have access to any other transport options	☐8	☐8
It’s what I am most comfortable or familiar using	☐9	☐9
Another reason: Please describe _____________	☐10	☐10

41. How was the [INSERT TEXT: “**taxi**” OR **“rideshare service”** OR **“limousine** or **other hire vehicle service**”] organised for that trip?

IF TAXI SHOW ALL CODES EXCEPT 4 / IF ANY TYPE OF HIRE VEHICLE DO NOT SHOW CODES 1-3

(1) At a taxi rank
(2) Hailed/waved down on the street
(3) Phoned a taxi company
(4) By calling a phone number
(5) By internet booking
(6) Contacted a driver directly
(7) Had a regular booking
(8) Used a smartphone application (app)
(9) Some other way
(10) I’m not sure because someone else organised it

ASK IF CAUGHT FROM RANK (Q41=1) or HAILED (Q41=2)

42. Do you recall the name of the taxi company whose car you caught?

(1) Yes: *Please specify* _________________
(2) I think so: *Please specify* _________________
(3) No

ASK IF CAUGHT FROM RANK (Q41=1) or HAILED (Q41=2)

43. When you thought about catching the taxi, did you…
    (1) Consider calling or booking a taxi or other type of vehicle instead
    (2) **Not** consider calling or booking a taxi or other type of vehicle.

ASK IF CONSIDERED BOOKING BUT DID NOT (q43=1)

44. Given you considered booking a taxi (or other type of vehicle) but instead [INSERT IF Q41=1 "got a taxi at a rank" OR IF Q41=2 "hailed a taxi on the street"], was that because…
    please select all that apply

MULTIPLE RESPONSE

    (1) You did not want to pay a booking fee
    (2) You didn't think a booked taxi would arrive any faster
    (3) You didn't have access to a phone or the internet to make a booking
    (4) You didn't know how to book a taxi or other vehicle
    (5) You wanted to be anonymous
    (6) There was a taxi immediately available [INSERT IF Q41=1 "at the rank" OR IF Q41=2 "to be hailed on the street"]
    (7) Something else: *Please specify* _______

ASK IF USED SOME FORM OF BOOKING SERVICE OR APP (Q41=3,4,5,8)

45. Do you recall the

INSERT IF Q41=3 "name of the taxi company you called?"

INSERT IF Q41=4 "phone number or the name of the phone service you called?"

INSERT IF Q41=5 "website you used?"

INSERT IF Q41=8 "smartphone application (app) you used?"

    (1) Yes: *Please specify* _________________
    (2) I think so: *Please specify* _________________
    (3) No

ASK IF CAUGHT FROM RANK (Q41=1)

46. How long did you have to wait at the rank?
    (1) Less than 5 minutes
    (2) 5 to less than 10 minutes
    (3) 10 to less than 20 minutes
    (4) 20 to less than 40 minutes
    (5) More than 40 minutes
    (6) Can't recall

ASK IF CAUGHT BY HAILING (Q41=2)

47. How long did you have to wait to hail a taxi?
    (1) Less than 5 minutes
    (2) 5 to less than 10 minutes
    (3) 10 to less than 20 minutes
    (4) 20 to less than 40 minutes
    (7) More than 40 minutes
    (8) Can't recall

ASK IF BOOKED (Q41=3, 4, 5, 6, 8)

48. Did you ask for a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"]:
    (1) As soon as possible / the next available
    (2) For a particular time

ASK IF BOOKED NEXT AVAILABLE VEHICLE (Q48=1)

49. Were you given an estimate of the waiting time till the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"] would arrive?
    (1) Yes
    (2) No
    (3) Can't recall

ASK IF BOOKED NEXT AVAILABLE VEHICLE (Q48=1)

50. How long did you have to wait for the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"] after you booked it?
    (1) Less than 5 minutes
    (2) 5 to less than 10 minutes
    (3) 10 to less than 20 minutes
    (4) 20 to less than 40 minutes
    (5) More than 40 minutes
    (6) Can't recall

ASK IF UNSURE OR OTHER METHOD OF GETTING VEHICLE (Q41=9-10)

51. How long did you have to wait for the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"]?
    (1) Less than 5 minutes
    (2) 5 to less than 10 minutes
    (3) 10 to less than 20 minutes
    (4) 20 to less than 40 minutes
    (5) More than 40 minutes
    (6) Can't recall

ASK IF REGULAR BOOKING (Q41=7) OR PREBOOKED (Q48=2)

52. How long, if at all, did you have to wait for the [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service**"] after your booked time?
    - **(0) It was early or on-time**
    - (1) Less than 5 minutes
    - (2) 5 to less than 10 minutes
    - (3) 10 to less than 20 minutes
    - (4) 20 to less than 40 minutes
    - (5) More than 40 minutes
    - (6) Can't recall

ASK IF GIVEN A WAITING TIME ESTIMATE (q49=1)

53. How accurate was the estimate of your waiting time?
    - (1) It came **much sooner** than estimated
    - (2) It came **a little sooner** than estimated
    - (3) It was **very close**
    - (4) It took **a little longer** than estimated
    - (5) It took **much longer** than estimated

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

54. How satisfied or dissatisfied were you with how long you had to wait to use the [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service**"]?
    - (1) Very dissatisfied
    - (2) Dissatisfied
    - (3) Slightly dissatisfied
    - (4) Slightly satisfied
    - (5) Satisfied
    - (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

55. Approximately how long do you think your last trip was?
    - (1) Less than 5 km
    - (2) 5 km to under 10 km
    - (3) 10 km to under 15 km
    - (4) 15 km to under 25 km
    - (5) 25 km to under 50 km
    - (6) 50 km or more

ASK IF LAST TRIP IN RIDESHARE OR LIMOUSINE OR OTHER OF HIRE VEHICLE

56. Before you booked the trip, did you compare prices for different hire vehicles?
    (1) Yes – on the internet or using apps
    (2) Yes – by phoning around
    (3) Yes – in some other way
    (4) No

ASK IF DID NOT COMAPRE PRICES (Q56=4)

57. Why did you not compare prices before you booked the trip?

MULTIPLE RESPONSE
    (1) I always use that provider or service
    (2) I was happy with the price estimate I was given
    (3) Some other reason

ASK IF LAST TRIP IN RIDESHARE OR LIMOUSINE OR OTHER OF HIRE VEHICLE

58. While you were making the booking, were you given a fare estimate?
    (1) Yes
    (2) No
    (3) Can't recall

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

59. Including any service fee for electronic payment and any other charges, what was the cost of your last trip? *Please enter your **best estimate** of the total cost to the nearest dollar*

    $_____
    (1) I'm not sure because someone else paid
    (2) Can't recall

ASK IF LAST TRIP IN ANY TYPE OF HIRE VEHICLE AND GIVEN A FARE ESTIMATE (q58=1)

60. How accurate did you find the fare estimate to be? Was the actual fare you paid…
    (1) **Much less** than the estimate
    (2) **A little less** than the estimate
    (3) **Very close** to the estimate
    (4) **A little more** than the estimate
    (5) **Much more** than the estimate

ASK ALL IF AWARE OF COST OF LAST TRIP [Q59=1-8]

61. How satisfied or dissatisfied were you with the amount you paid for the trip?
    (1) Very dissatisfied
    (2) Dissatisfied
    (3) Slightly dissatisfied
    (4) Slightly satisfied
    (5) Satisfied
    (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

62. Thinking about all aspects of your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"], how satisfied or dissatisfied were you with the overall experience?
    (1) Very dissatisfied
    (2) Dissatisfied
    (3) Slightly dissatisfied
    (4) Slightly satisfied
    (5) Satisfied
    (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

63. And what impact, if any, did your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service** "] have on how likely you are to use that service again?
    (1) Made you **much less** likely to use it again
    (2) Made you a **little less** likely to use it again
    (3) Had **no impact**
    (4) Made you a **little more** likely to use it again
    (5) Made you **much more** likely to use it again

PART 6: PERCEIVED STRENGTHS AND WEAKNESSES OF SERVICES

ASK Q64 FOR ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

64. Do you personally think that each of the following is a strength (✓), weakness (✗) or neutral (○) characteristic of the different types of transport options? *If you don't have any experience or opinion, please tell us what you think is most likely the case.*

REQUIRES ONE ANSWER FOR EACH TYPE OF TRANSPORT PER ROW

RANDOMISE ORDER		Taxis			Rideshare			Limousines or other hire vehicle services		
		✓	○	✗	✓	○	✗	✓	○	✗
A	Safety	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
B	Value for money	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
C	Availability	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
D	Waiting times	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
E	Vehicle quality	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
F	Navigation and route knowledge	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
G	Driver presentation and attitude	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
H	Driving skills	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
I	Customer service	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
J	Convenience	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

65. Overall, do you have a preference for using:
   (1) **Taxis**
   (2) Hire vehicles - **Rideshare, Limousines** or **other hire vehicle services**
   (3) No preference
   (4) Prefer not to use any of these

ASK IF PREFERENCE FOR HIRE VEHICLES [Q65=2]

66. Do you have a preference for:
   (1) **Rideshare** services (eg: Uber, Go Buggy, Ola, Bolt)
   (2) **Limousines** or **other hire vehicle services**
   (3) Both equally

ASK IF HAVE A PREFERENCE FOR TAXIS [Q65=1] OR HIRE VEHICLES [Q65=2]

67. How strong is your preference for using [INSERT TEXT: "**taxis"** OR **"rideshare services"** OR **"limousine** or **other hire vehicle services**" OR "**any type of hire vehicles**"]? Would you say…
    (1) You would **only** use them
    (2) You **strongly** prefer to use them
    (3) You have only a **slight** preference for using them

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

68. In the next 12 months, what is the thing that is most likely to get you to use different types of transport more regularly?

SINGLE RESPONSE PER **COLUMN**

	A	B	C
	Taxis	**Rideshare services**	**Limousines or other hire vehicle services**
If fares get cheaper	1	1	1
If there is no peak or surge pricing	2	2	2
If more services become available in my area	3	3	3
If there is a shorter time to wait to get one	4	4	4
If booking services improve	5	5	5
If driver quality improves	6	6	6
None of these improvements would make me use them more regularly	7	7	7

PART 7: AWARENESS OF REGULATION CHANGES

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

69. On 1 November 2017 changes were made to the way fares and services were regulated for **taxis** and **hire vehicles**. Prior to doing this survey, were you aware changes had been made to the regulations around taxis and hire vehicles?
    (1) Yes
    (2) I had heard there were changes, but not aware exactly what they were
    (3) Was not aware that there had been changes.

ASK IF CODE 1-2 AT Q69

70. Which of the following changes were you aware of: MULTIPLE RESPONSE EXCEPT CODE 5
    (1) Booked trips in **taxis** no longer subject to maximum fare regulation
    (2) All providers of booked trips in **taxis** or **hire vehicles** have to give a fare estimate before starting a trip
    (3) Rank and hail **taxi** trips remain subject to maximum fares set by the Government
    (4) Rank and hail trips can still only be undertaken by **taxis**
    (5) None of these

PART 8: OTHER DEMOGRAPHICS

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

71. Would you mind telling us your approximate household annual income from all sources before tax, bearing in mind that this information will remain strictly confidential and that ORIMA Research and its client have no way of identifying you? Just click on the answer below you believe comes closest, even if you are not completely sure.
    (1) Under $20,000
    (2) $20,000 to under $30,000
    (3) $30,000 to under $40,000
    (4) $40,000 to under $50,000
    (5) $50,000 to under $60,000
    (6) $60,000 to under $80,000
    (7) $80,000 to under $100,000
    (8) $100,000 to under $120,000
    (9) $120,000 to under $180,000
    (10) $180,000 or more
    (11) Can't say
    (12) Prefer not to say

72. Do you have a physical disability

SINGLE RESPONSE
    (1) Yes
    (2) No
    (3) Prefer not to say

ASK IF HAVE DISABILITY (Q70=1)

73. Can you:

SINGLE RESPONSE

(1) Catch any type of taxi or rideshare
(2) Only use a wheelchair accessible taxi or rideshare
(3) Can't say
(4) Prefer not to say

ASK IF HAVE DISABILITY (Q72=1)

74. Do you get payment assistance for taxis from:

CODES 1 AND 2 ARE MULTIPLE RESPONSE

(1) Taxi Transport Subsidy Scheme
(2) Department of Veteran Affairs
(3) Neither of these

CLOSE

Thank you for taking the time to answer this survey. The survey is being conducted by ORIMA Research and the ORU on behalf of the NSW Government's Independent Pricing and Regulatory Tribunal.

Please click on SUBMIT below to submit your survey answers and ensure you receive your incentive.

Appendix B: Sample Demographics

Targets

The table below shows the 2019 sample demographics versus quotas based on ABS population data. The 2019 survey sample was weighted to match the 2018 sample, to maximise consistency.

%
Quotas

Sydney	Male	Female	Total
16-29	28%	34%	31%
30-39	24%	21%	23%
40-49	23%	21%	22%
50-59	15%	14%	14%
60-69	6%	7%	6%
70+	4%	4%	4%
Total	53%	47%	100%

Reg City	Male	Female	Total
16-29	25%	35%	30%
30-39	19%	18%	19%
40-49	26%	18%	22%
50-59	16%	16%	16%
60-69	9%	9%	9%
70+	5%	3%	4%
Total	50%	50%	100%

Rest NSW	Male	Female	Total
16-29	40%	30%	36%
30-39	23%	25%	24%
40-49	7%	24%	14%
50-59	15%	9%	13%
60-69	11%	7%	9%
70+	40%	30%	5%
Total	61%	39%	100%

%
Actuals

Sydney	Male	Female	Total
16-29	28%	35%	31%
30-39	24%	21%	23%
40-49	22%	21%	22%
50-59	15%	13%	14%
60-69	6%	7%	6%
70+	4%	3%	4%
Total	53%	47%	100%

Reg City	Male	Female	Total
16-29	20%	35%	28%
30-39	20%	22%	21%
40-49	22%	16%	19%
50-59	18%	14%	16%
60-69	14%	10%	12%
70+	6%	2%	4%
Total	47%	53%	100%

Rest NSW	Male	Female	Total
16-29	33%	31%	32%
30-39	24%	22%	23%
40-49	5%	25%	13%
50-59	18%	10%	15%
60-69	14%	7%	12%
70+	6%	4%	5%
Total	59%	41%	100%

Variation

Sydney	Male	Female	Total
16-29	0%	-1%	0%
30-39	0%	0%	0%
40-49	0%	0%	0%
50-59	0%	+1%	0%
60-69	0%	0%	0%
70+	0%	0%	0%
Total	-1%	-1%	0%

Reg City	Male	Female	Total
16-29	+4%	0%	+2%
30-39	-1%	-4%	-2%
40-49	+5%	+2%	+3%
50-59	-2%	+2%	0%
60-69	-5%	-1%	-3%
70+	-1%	+1%	0%
Total	+3%	-3%	0%

Rest NSW	Male	Female	Total
16-29	+7%	-1%	+4%
30-39	-1%	+3%	+1%
40-49	+2%	-1%	0%
50-59	-3%	-1%	-2%
60-69	-4%	-1%	-2%
70+	-2%	0%	-1%
Total	2%	-2%	0%

Appendix C: Detailed Strengths and Weaknesses

Figure 90: Detailed strengths and weaknesses of transport options - Sydney Q64

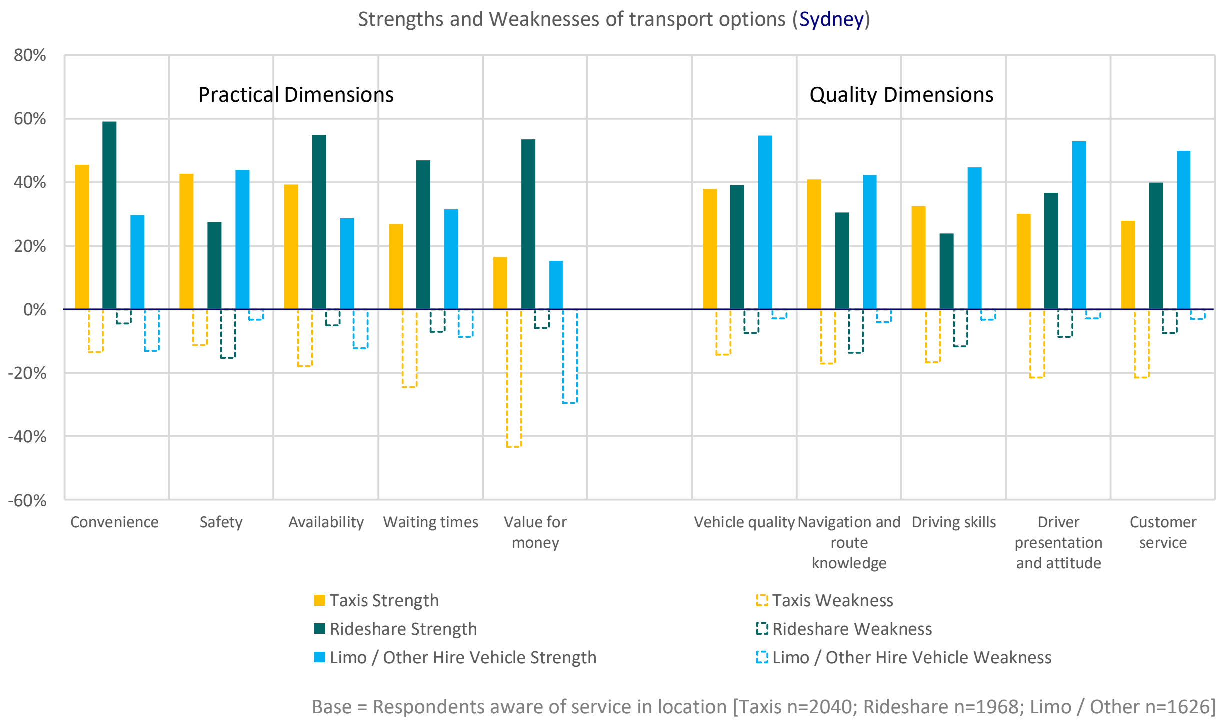


Figure 91: Detailed strengths and weaknesses of transport options - Other Urban Q64

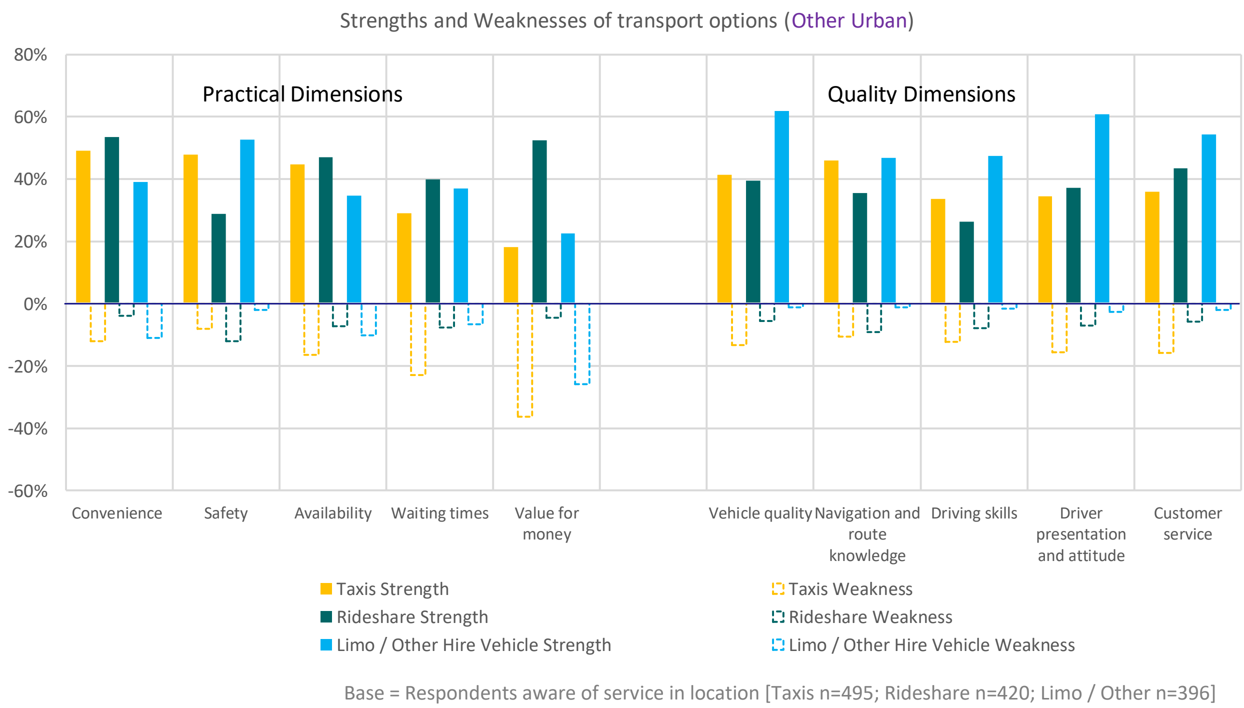
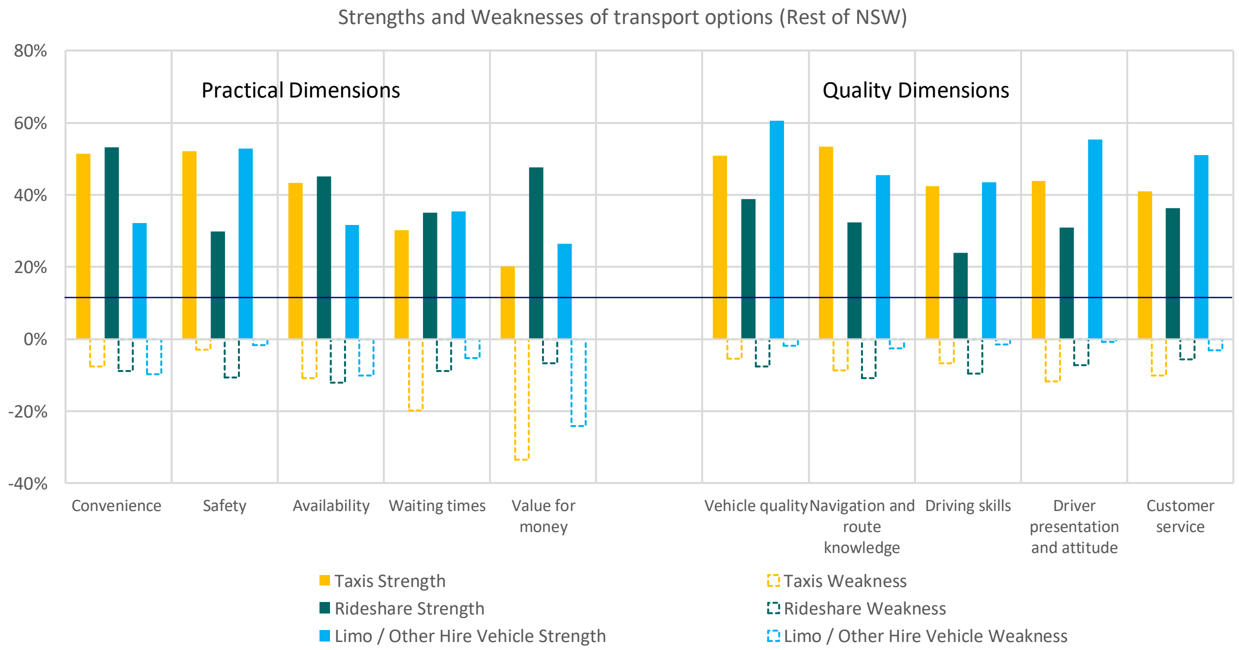


Figure 92: Strengths and weaknesses of transport options - Rest of NSW Q64



Base = Respondents aware of service in location [Taxis n=415; Rideshare n=197; Limo / Other n=227]

Appendix D: Demographic Comparisons

Demographic breakdowns for the 2019 survey are provided in a separate interactive electronic format.

Appendix E: Tracking Chart Data

This section shows the data underlying each of the tracking charts throughout the report.

Figure numbers shown in the captions relate to the position of the tracking chart in the main body of the report.

Figure 2: Change in awareness of point-to-point transport services in their location Q5/8/11

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	98%	89%	82%	97%	59%	75%	92%	29%	45%
2018	98%	94%	83%	98%	77%	81%	92%	43%	52%
2019	**97%**	**94%**	**78%**	**95%**	**80%**	**76%**	**93%**	**44%**	**51%**

Figure 4: Change in usage of point-to-point transport services in the last 6 months among all respondents Q6/9

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	51%	36%	11%	35%	10%	8%	32%	8%	4%
2018	52%	48%	13%	37%	28%	13%	29%	15%	5%
2019	**49%**	**51%**	**10%**	**35%**	**29%**	**10%**	**34%**	**14%**	**6%**

Figure 7: Change in frequency of using point-to-point transport services among service users Q13

Base = used in the last 6 months

	Sydney					
	Weekly			Monthly		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	13%	18%	16%	52%	69%	38%
2018	15%	20%	12%	51%	68%	35%
2019	**15%**	**21%**	**14%**	**51%**	**66%**	**41%**

	Other Urban					
	Weekly			Monthly		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	11%	16%	5%	53%	65%	32%
2018	8%	13%	2%	42%	59%	25%
2019	9%	17%	9%	41%	62%	26%

	Rest of NSW					
	Weekly			Monthly		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	16%	19%	17%	48%	72%	33%
2018	5%	14%	0%	40%	62%	8%
2019	13%	13%	8%	53%	60%	58%

Figure 9: Rate of change in use of transport services in the last 12 months amongst those who have ever used transport services. Q16

Table shows nett differential (ie: % reported an increase in use minus the proportion who reported a decrease in use)

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2016*	-9%	8%		-8%	2%		-8%	3%	
2017	-26%	26%	-10%	-19%	28%	-6%	-12%	21%	-12%
2018	-27%	29%	-28%	-26%	34%	-17%	-15%	20%	-25%
2019	**-26%**	**23%**	**-28%**	**-27%**	**20%**	**-24%**	**-20%**	**1%**	**-45%**

Figure 13: Changes in reported Impact of using hire vehicles on the use of taxis amongst users of both services Q17

	Sydney		Other Urban		Rest of NSW	
	Use taxis a LOT less often	Use taxis less often	Use taxis a LOT less often	Use taxis less often	Use taxis a LOT less often	Use taxis less often
2016*	41%	71%	37%	64%	44%	88%
2017	55%	78%	49%	66%	42%	63%
2018	53%	77%	53%	65%	54%	74%
2019	**54%**	**78%**	**53%**	**80%**	**53%**	**76%**

Figure 15: Change in prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	15%	11%	5%	9%	5%	2%	11%	16%	3%
2018	16%	13%	4%	12%	11%	3%	11%	15%	4%
2019	**17%**	**15%**	**6%**	**13%**	**14%**	**4%**	**10%**	**19%**	**4%**

Figure 18: Change in success rate for last attempt among users who could recall the outcome
(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses) Q30

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	77%	92%	91%	83%	95%	94%	77%	88%	94%
2018	78%	93%	92%	81%	93%	96%	87%	95%	100%
2019	**78%**	**91%**	**86%**	**80%**	**93%**	**96%**	**82%**	**91%**	**86%**

Figure 21: Change in experiencing ANY problem using point-to-point transport amongst users Q28/29

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2013*	40%								
2014*	35%			27%			26%		
2015*	36%			24%			24%		
2016*	37%	27%		26%	22%		27%	22%	
2017	62%	47%	25%	40%	34%	15%	45%	40%	18%
2018	65%	49%	26%	55%	38%	10%	49%	49%	17%
2019	**60%**	**51%**	**30%**	**51%**	**45%**	**23%**	**54%**	**54%**	**36%**

Figure 23: Change in satisfaction with point-to-point transport services Q7/10

	Sydney					
	Satisfied			Dissatisfied		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	53%	50%	41%	14%	4%	2%
2018	56%	59%	43%	15%	4%	1%
2019	**60%**	**62%**	**40%**	**12%**	**5%**	**2%**

	Other Urban					
	Satisfied			Dissatisfied		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	55%	23%	39%	8%	4%	2%
2018	55%	38%	45%	11%	4%	2%
2019	**58%**	**45%**	**43%**	**8%**	**4%**	**2%**

	Rest of NSW					
	Satisfied			Dissatisfied		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	54%	19%	25%	11%	6%	3%
2018	56%	25%	27%	8%	8%	4%
2019	**61%**	**29%**	**30%**	**9%**	**11%**	**4%**

Figure 27: Changes in perceived strengths and weaknesses of transport options amongst those aware of the service in their region (average Practical Dimensions and Quality Dimensions scores) Q64

	Sydney					
	Practical Dimensions			Quality Dimensions		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	7%	33%	20%	5%	23%	48%
2018	6%	41%	18%	7%	26%	48%
2019	**12%**	**41%**	**16%**	**16%**	**24%**	**45%**

	Other Urban					
	Practical Dimensions			Quality Dimensions		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	22%	28%	29%	28%	21%	53%
2018	16%	33%	24%	24%	24%	53%
2019	**19%**	**37%**	**26%**	**25%**	**29%**	**53%**

	Rest of NSW					
	Practical Dimensions			Quality Dimensions		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	23%	31%	22%	36%	23%	48%
2018	25%	34%	31%	36%	29%	54%
2019	**25%**	**33%**	**25%**	**38%**	**24%**	**49%**

Figure 29: Changes in preferences for transport options Q65/66

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Prefer not to use any	Taxis	Rideshare	Prefer not to use any	Taxis	Rideshare	Prefer not to use any
2017	26%	25%	17%	27%	9%	24%	31%	8%	26%
2018	25%	33%	14%	25%	19%	19%	29%	16%	24%
2019	**25%**	**35%**	**12%**	**26%**	**24%**	**17%**	**33%**	**14%**	**24%**

Figure 41: Change in perceptions of OVERALL value for money amongst those aware of the service in their region [Q20]

	Sydney					
	Good + OK			Poor		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	46%	61%	36%	43%	5%	17%
2018	49%	67%	34%	42%	6%	17%
2019	**52%**	**54%**	**53%**	**38%**	**30%**	**28%**

	Other Urban					
	Good + OK			Poor		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	50%	38%	40%	25%	3%	10%
2018	46%	50%	39%	31%	6%	13%
2019	**71%**	**62%**	**59%**	**7%**	**5%**	**7%**

	Rest of NSW					
	Good + OK			Poor		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	46%	50%	33%	28%	6%	13%
2018	51%	56%	32%	27%	4%	13%
2019	**35%**	**42%**	**38%**	**16%**	**16%**	**15%**

Figure 51: Change over time in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport [Q33]

	Sydney				Other Urban				Rest of NSW			
	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use
2017	10%	28%	17%	14%	8%	37%	21%	8%	17%	33%	14%	22%
2018	15%	39%	15%	9%	13%	34%	11%	6%	9%	27%	14%	6%
2019	**16%**	**35%**	**19%**	**12%**	**12%**	**44%**	**14%**	**7%**	**24%**	**39%**	**19%**	**21%**

Figure 54: Changes in usage of vehicle types for last trip (base = used transport in last 6 months) [QX]

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	56%	39%	6%	73%	18%	10%	79%	16%	5%
2018	45%	50%	6%	52%	36%	12%	61%	30%	9%
2019	**42%**	**54%**	**5%**	**46%**	**46%**	**8%**	**70%**	**25%**	**5%**

Figure 57: Last trip – Change in proportion of Last Trips after 10pm Q38

	Sydney				Other Urban				Rest of NSW			
	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs
2017	9%	17%	9%	7%	14%	16%	4%	5%	13%	27%	7%	15%
2018	8%	18%	6%	6%	14%	22%	4%	16%	16%	19%	5%	13%
2019	**8%**	**14%**	**7%**	**7%**	**12%**	**24%**	**9%**	**8%**	**16%**	**39%**	**5%**	**7%**

Figure 62: Last trip – Changes in method of obtaining vehicle Q41

	Sydney				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2012	33%	34%	23%	4%	1%
2013	30%	33%	25%	4%	2%
2014	29%	32%	23%	6%	3%
2015	30%	29%	25%	8%	3%
2016	31%	26%	25%	8%	3%
2017	34%	22%	25%	8%	4%
2018	34%	21%	24%	8%	4%
2019	**33%**	**21%**	**21%**	**11%**	**5%**

	Other Urban				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2014	32%	11%	47%	3%	0%
2015	33%	10%	44%	3%	2%
2016	32%	6%	47%	5%	2%
2017	33%	5%	52%	4%	2%
2018	37%	4%	51%	4%	3%
2019	**36%**	**5%**	**41%**	**11%**	**1%**

	Rest of NSW				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2014	27%	3%	62%	1%	1%
2015	29%	0%	64%	0%	0%
2016	20%	2%	71%	1%	0%
2017	22%	2%	66%	2%	2%
2018	25%	5%	61%	4%	0%
2019	**20%**	**5%**	**66%**	**3%**	**2%**

Figure 64: Last trip – Changes in type of booking Q48

	Sydney				Other Urban				Rest of NSW			
	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked
2017	53%	88%	47%	12%	82%	88%	18%	12%	73%	92%	27%	8%
2018	58%	89%	42%	11%	67%	84%	33%	16%	74%	82%	26%	18%
2019	**55%**	**88%**	**45%**	**12%**	**69%**	**89%**	**31%**	**11%**	**70%**	**87%**	**30%**	**13%**

Figure 70: Changes in overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52

	Sydney					
	Within 5 minutes			Within 10 minutes		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	56%	49%	73%	82%	89%	82%
2018	55%	46%	78%	82%	88%	89%
2019	**55%**	**49%**	**75%**	**82%**	**89%**	**85%**

	Other Urban					
	Within 5 minutes			Within 10 minutes		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	48%	32%	90%	81%	81%	95%
2018	53%	48%	84%	76%	88%	87%
2019	**46%**	**42%**	**61%**	**81%**	**90%**	**78%**

	Rest of NSW					
	Within 5 minutes			Within 10 minutes		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	39%	46%	63%	71%	81%	75%
2018	34%	38%	73%	71%	75%	81%
2019	**40%**	**23%**	**43%**	**78%**	**81%**	**53%**

Figure 75: Last trip – Changes in satisfaction with waiting time Q54

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2013	73%								
2014	74%			78%			89%		
2015	73%			75%			75%		
2016	68%	80%		80%	88%		90%	100%	
2017	83%	90%	87%	83%	89%	100%	87%	96%	100%
2018	84%	90%	90%	81%	87%	85%	78%	82%	79%
2019	**84%**	**87%**	**88%**	**88%**	**94%**	**90%**	**92%**	**92%**	**92%**

Figure 77: Last trip – Change in fares paid [Excluding 'others paid / can't recall'] Q59

	Sydney					
	Less than $20			Less than $40		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	25%	49%	3%	64%	83%	12%
2018	22%	43%	2%	54%	78%	4%
2019	**24%**	**43%**	**8%**	**58%**	**75%**	**16%**

	Other Urban					
	Less than $20			Less than $40		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	53%	69%	6%	90%	89%	6%
2018	46%	49%	4%	83%	83%	4%
2019	**43%**	**52%**	**7%**	**80%**	**84%**	**7%**

	Rest of NSW					
	Less than $20			Less than $40		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	58%	59%	33%	86%	86%	50%
2018	50%	40%	7%	80%	73%	19%
2019	**54%**	**53%**	**0%**	**82%**	**85%**	**19%**

Figure 83: Last trip – Change in satisfaction with fares (if aware of amount) Q61

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2013	50%								
2014	50%			60%			66%		
2015	53%			55%			57%		
2016	59%	81%		69%	83%		66%	88%	
2017	61%	89%	81%	69%	92%	88%	74%	100%	100%
2018	61%	88%	94%	63%	88%	84%	61%	84%	94%
2019	**71%**	**85%**	**97%**	**68%**	**90%**	**85%**	**66%**	**64%**	**100%**

Figure 85: Last trip – Change in overall Satisfaction with last trip Q62

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	82%	94%	83%	89%	97%	90%	88%	96%	100%
2018	83%	94%	95%	84%	92%	91%	83%	89%	95%
2019	**85%**	**92%**	**95%**	**93%**	**92%**	**92%**	**92%**	**85%**	**100%**

Figure 87: Last trip – Change in impact on likelihood to re-use the transport service again Q63

	Sydney			Other Urban			Rest of NSW		
	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV	Taxis	Rideshare	Limo / Other HV
2017	6%	51%	39%	11%	76%	40%	17%	58%	100%
2018	8%	45%	67%	13%	58%	65%	0%	49%	61%
2019	**10%**	**40%**	**65%**	**23%**	**46%**	**41%**	**23%**	**31%**	**59%**