Independent Pricing and Regulatory Tribunal of NSW

2020 Point-to-Point Transport Survey Report

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ORIMA RESEARCH

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Appendices

This research was conducted in accordance with our ISO20252 and ISO27001 accreditation, and with applicable Australian privacy legislation.

1. Executive Summary

Source of data: The 2020 IPART Point-to-Point Transport Survey is the fourth annual survey using a revised and updated questionnaire. Three independent samples are used, one for Sydney (n=2026 respondents), one for 'other urban' areas (n=508) and one for the rest of NSW (n=407). 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

The 2020 point-to-point transport survey captures the interaction of two significant influences. The longer-term trajectory of the NSW point-to-point transport market has seen the swift emergence of rideshare into a market long-dominated by taxis. This emergence has been slower and later outside of Sydney, and the 2019 survey suggested that the rideshare growth phase may be slowing overall. The acute influence was of course the COVID-19 pandemic, which dominated life in 2020, and which saw significant restrictions on movement and activity that would be expected to have a major impact on point-to-point transport use.

Prior to COVID, the key question of interest was whether the rideshare growth phase would further flatten, and if so at what level taxis and rideshare might stabilise. With the emergence of COVID, the key question shifted to how COVID would affect the overall market, and whether it affected different types of transport differentially.

The 2020 results show that COVID did indeed significantly impact the overall point-to-point transport market, but that it affected taxi use considerably more so than rideshare use, especially in Sydney. In Sydney, 44% of respondents reported using a rideshare in the 6 months prior to the survey, down from 51% the year before. For taxis, the drop was from 49% to just 31%. Similarly larger declines in taxi use compared to rideshare were seen outside of Sydney. *COVID* and *less need to move around* were cited as the largest reasons for reduced usage. Interestingly, while use of rideshare reduced less, for those people who felt they were using point-to-point transport less than usual, those using rideshare less were considerably more likely to say that that was explicitly related to COVID than those using taxis less. This may reflect the interaction between the longer-term pattern and the short-term impacts of COVID.

In all regions, but especially Sydney and Other Urban areas, last trips are increasingly likely to be in rideshare than in taxis, indicating **the growth of rideshare has not completely flattened yet**.

Once these usage declines were allowed for though, **the relativities and patterns *within* the market seem to have held fairly constant, and perceptions of the strengths and weaknesses of the different forms of transport were consistent with previous years**. Rideshare is seen as the most practical choice, scoring highest for value and lowest for safety. Limousines and other hire vehicles score highly on all quality dimensions. Taxis are seen as poorer than rideshare on all dimensions other than safety, but especially on value. Overall perceptions of value are matched by lower rideshare fares for equivalent distance trips and higher satisfaction with fares for last trips.

Other than total usage, there does not appear to have been many substantial impacts on how people use or interact with point-to-point transport services during COVID. Only small proportions of users reported issues related to COVID hygiene. Changes observed in 2020 last trips were fewer trips to and from airports, reduced use of ranks to get taxis, and an increase in ASAP bookings. Across all services and locations, 24%-42% of respondents said they were less likely to use point-to-point transport due to COVID, and less confident to do so.

Overall satisfaction with point-to-point transport services remains strong, but in both Sydney and Other Urban areas satisfaction with rideshare services available rose slightly, while it fell for taxi services available. In Sydney 52% of respondents were satisfied with the taxi service available, and 13% dissatisfied (nett +39%). For rideshare 65% were satisfied and only 4% dissatisfied (nett +61%). In Other Urban areas satisfaction with rideshare services rose to 47%, while it fell to 52% for taxis. In the rest of NSW satisfaction with taxis (53%) remains much stronger than rideshare services (24%).

More than 90% of rideshare users in all locations were satisfied with their last trip. Satisfaction with taxis was slightly lower than rideshare, especially in Sydney (78% vs 93%), but still moderately strong.

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. See appendix F for details

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 2018-2020. This allows the focus of the reporting to be on updating results and identifying any changes over time.

While the 2020 survey kept an identical method and questionnaire, like all things in 2020 the survey needs to be contextualised to the COVID-19 pandemic. Additional items were added to a number of existing survey questions to pick up the extent to which COVID was a new factor in the use of point-to-point transport, and a number of additional explicit COVID questions were included.

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.

An additional objective in 2020 was to understand the effect of COVID on use of point-to-point transport – both overall, and relatively across the different types of transport choice available.

C. Methodology

The 2020 methodology was identical to those used since 2017. The 2020 survey was administered online to a total of 2,941 NSW residents between 23 October and 15 November 2020 (including a brief pause to examine and confirm pilot data). Three independent samples were obtained:

1. Sydney n=2026
2. Other Urban (Newcastle, Wollongong, Gosford and Wyong) n=508
3. Rest of NSW n=407

As in the past three surveys, 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.

The 2020 survey again updated rideshare provider names to suit the current marketplace. To respond to the COVID context, additional COVID response options were added to some questions (eg: reasons for changing use of transport options), and several additional new COVID-specific questions were included to measure explicit impacts of COVID of customer choices.

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

The questionnaire took an average of 12 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 identify which area and service results relate more easily 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, Shebah, Ola or Didi
	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 2017-2020 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.

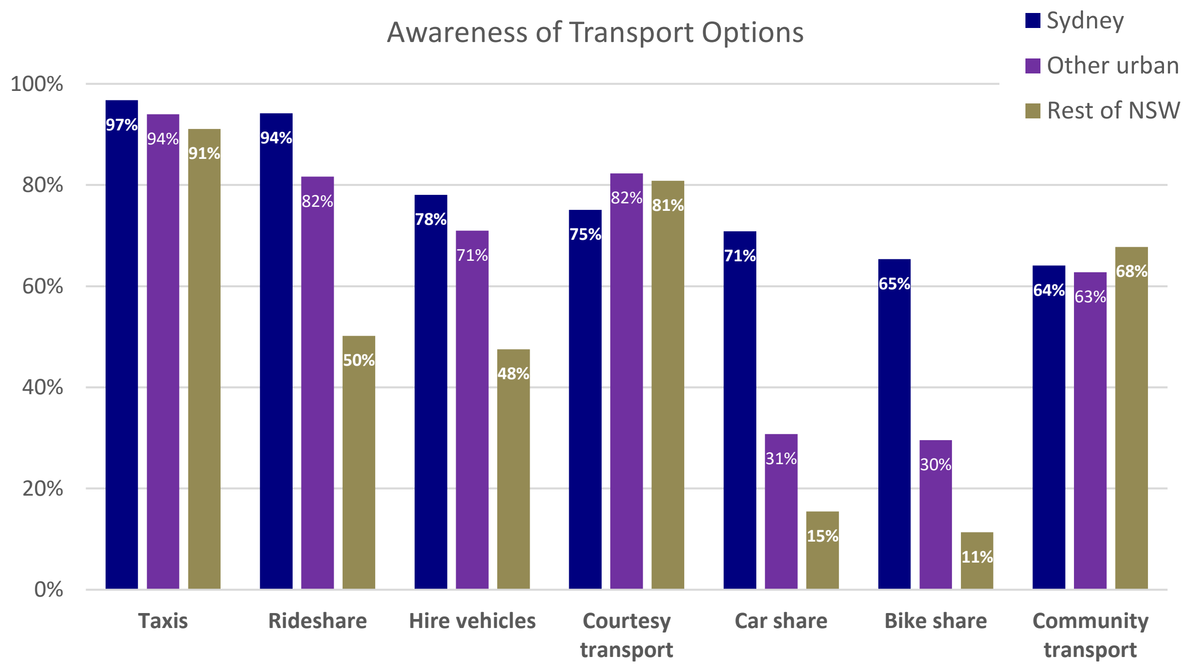
A. Local Transport Services

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.

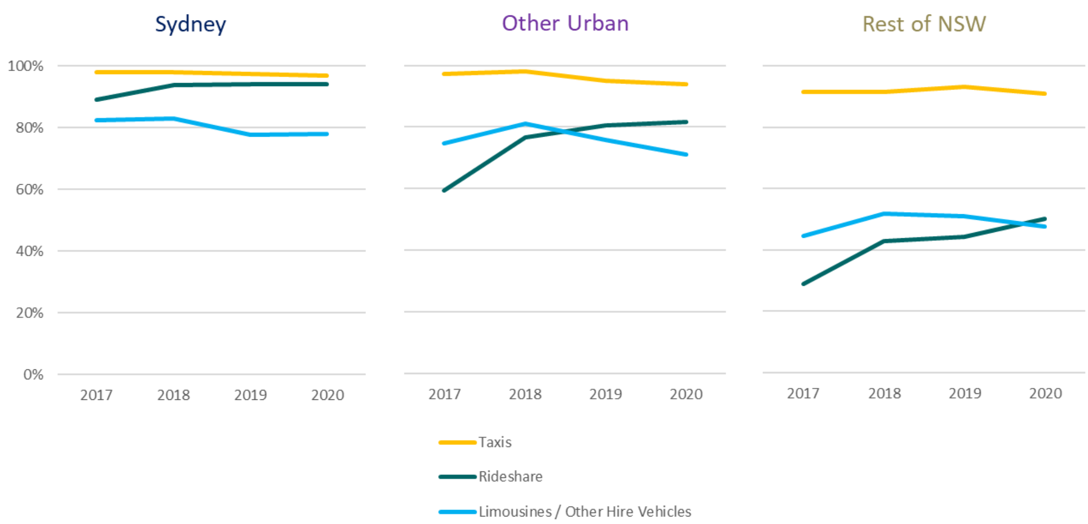
Awareness of the growing emergence of rideshare has mostly plateaued in 2019 and 2020, with only the rest of NSW showing any real increase. In Sydney, awareness of rideshare is very close to taxis, but remains lower outside of Sydney where rideshare remains less prevalent.

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



Base = all respondents [Sydney n=2,026; Other Urban n=508; Rest of NSW n=407]

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



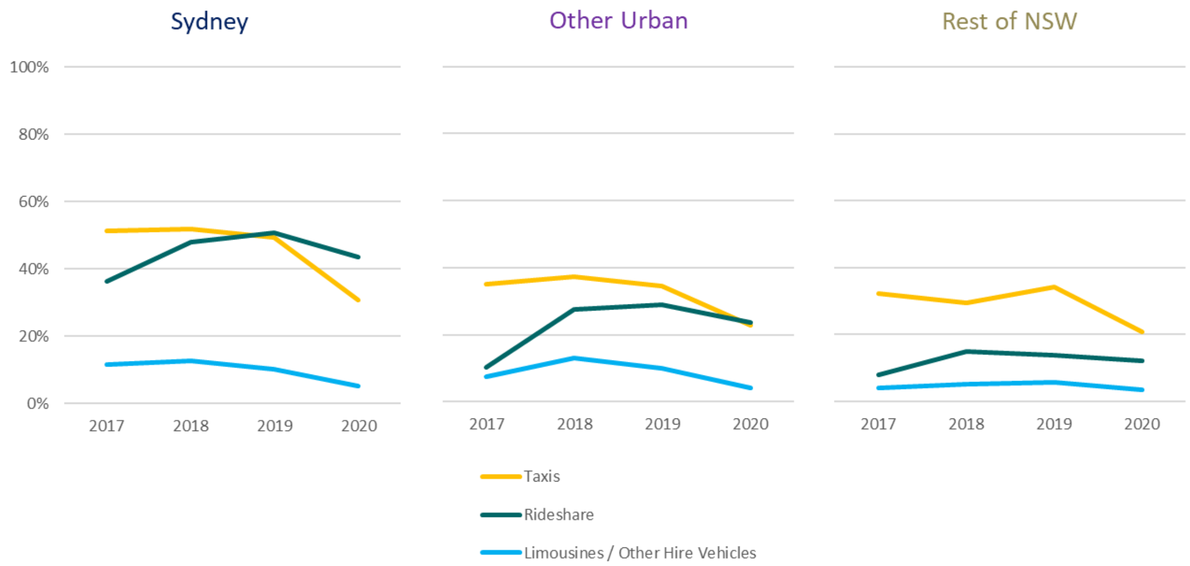
Usage of taxis was by far the most common of the different types of transport prior to 2018. However, increases in reported use of rideshare across 2018 and 2019 reduced the gap to taxis, and by 2018 there was virtually equivalent usage of both in Sydney. In 2020, during COVID, there was a very substantial decline in the use of taxis, but a much smaller decline in the use of rideshare.

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 the last 6 mths (Base = **all respondents**)	**2020**	**31%**	**23%**	**21%**	**44%**	**24%**	**12%**	**5%**	**4%**	**3%**
	Sample size	*2,026*	*508*	*407*	*2,026*	*508*	*407*	*2,026*	*508*	*407*
	2019	49%	35%	34%	51%	29%	14%	10%	10%	6%
	Sample size	*2,095*	*522*	*446*	*2,095*	*522*	*446*	*2,095*	*522*	*446*
	2018	52%	37%	29%	48%	28%	15%	13%	13%	5%
	Sample size	*2,147*	*533*	*478*	*2,147*	*533*	*478*	*2,147*	*533*	*478*
	2017	51%	35%	32%	36%	10%	8%	11%	8%	4%
	Sample size	*2,048*	*501*	*453*	*2,048*	*501*	*453*	*2,048*	*501*	*453*
Used in the last 6 mths (Base = **aware of service**)	**2020**	**32%**	**24%**	**23%**	**46%**	**29%**	**24%**	**7%**	**6%**	**7%**
	Sample size	*1,962*	*480*	*378*	*1,909*	*400*	*191*	*1,589*	*373*	*203*
	2019	51%	36%	37%	54%	36%	31%	13%	13%	11%
	Sample size	*2,040*	*497*	*415*	*1,968*	*420*	*197*	*1,626*	*396*	*227*
	2018	53%	38%	32%	51%	36%	35%	15%	16%	10%
	Sample size	*2,104*	*523*	*438*	*2,015*	*409*	*205*	*1,784*	*432*	*247*
	2017	52%	36%	35%	41%	17%	27%	14%	10%	9%
	Sample size	*2,009*	*487*	*416*	*1,825*	*297*	*131*	*1,686*	*374*	*202*

In Sydney, 31% of respondents reported having used a taxi in the last six months – compared to 49% in the 2019 survey. At the same time, rideshare dropped from 51% to 44%, with the use of rideshare for the first time substantially more commonly reported than taxis. In other urban areas, reported use of taxis (23%) and rideshare (24%) was about equal, but the decline from 2019 was greater for taxis (-12% compared to -5% for rideshare). In the rest of NSW, taxi use (21%) remained more common than rideshare (12%), but again, fell more sharply for taxis (-13%) than rideshare (-2%).

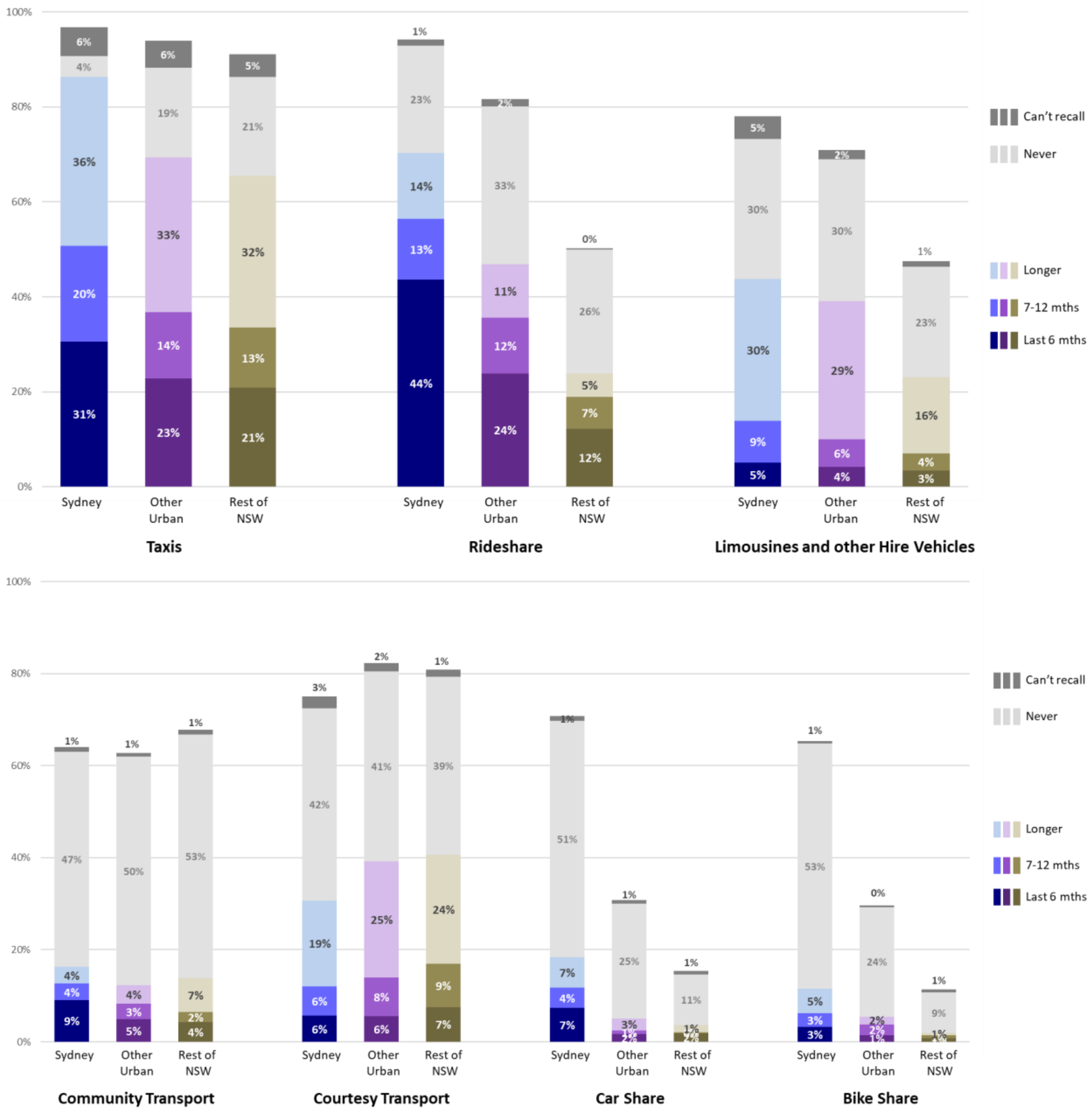
Figure 4: Change in usage of point-to-point transport services in the last 6 months among all respondents Q6/9



There are some previously seen patterns in reported usage in 2020, and some new effects. The proportion of people aware of taxis but who have never used one remains much lower than for rideshare, and is lowest for limousines and other hire vehicles.

The major change observed in 2020 is usage in the last 6 and 12 months. In Sydney, just 31% of people who were aware of taxis had used one in the last 6 months, down from 49% in the 2019 survey. By comparison, rideshare fell only from 51% to 44%. Similar but smaller patterns were seen in Other Urban areas and the rest of NSW. These patterns are shown in Figure 4. The 12-month usage figures are also important to note. Usage of taxis in Sydney was reported at 51% in the last 12 months (-12%), while rideshare was 57% (-2%). In Other Urban areas, taxis were 37% (-12% in 2019) and rideshare was 36% (-3%).

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



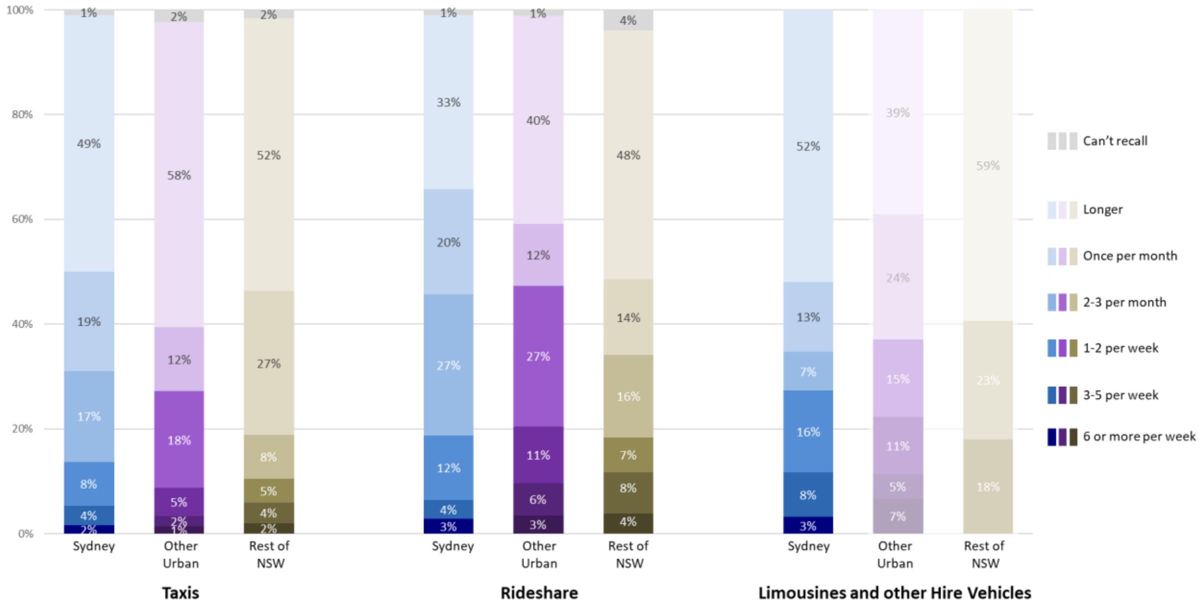
Base = all respondents [Sydney n=2,026; Other Urban n=508; Rest of NSW n=407]

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 at all, do so somewhat more frequently than do those who use taxis or limousines and other hire vehicles, a pattern which has been consistently seen across each year of the survey.

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

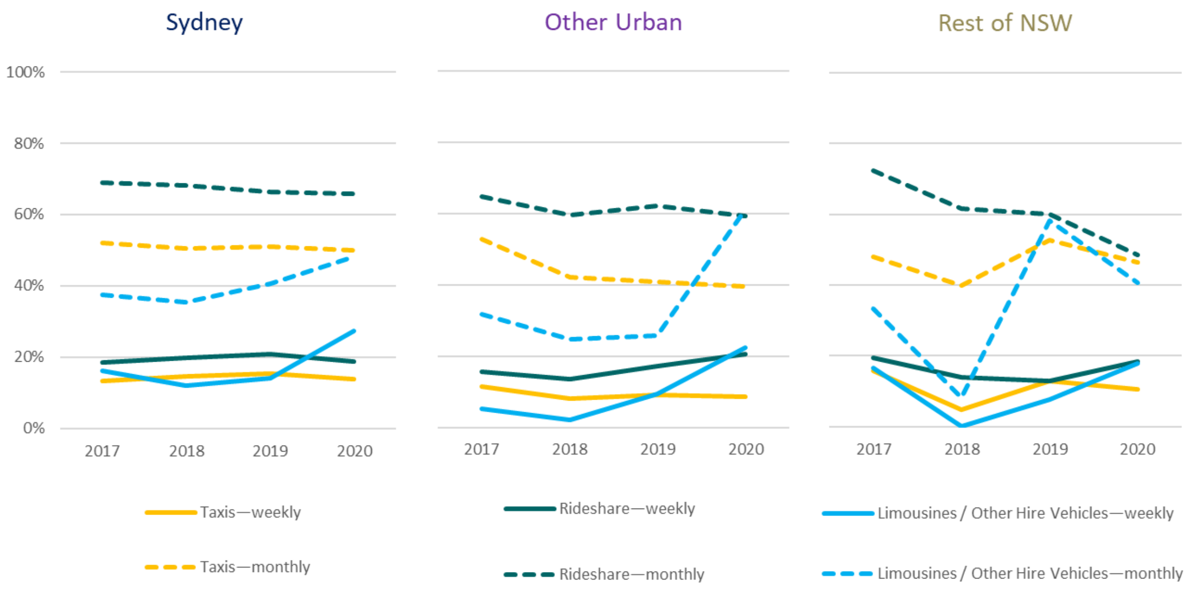


Base = Used service in the last 6 months [See sample sizes in table]

Frequency of use in the last 6 months	Taxis			Rideshare services			Limousines or other hire vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Proportion used in last 6 months	**31%**	**23%**	**21%**	**44%**	**24%**	**12%**	**5%**	**4%**	**3%**
Sample size (base = used in last 6 months)	*623*	*108*	*79*	*888*	*97*	*34*	*104*	*21*	*9*
6 or more times per week	2%	1%	2%	3%	3%	4%	3%	7%	0%
3-5 times per week	4%	2%	4%	4%	6%	8%	8%	5%	0%
1-2 times per week	8%	5%	5%	12%	11%	7%	16%	11%	18%
At least weekly	**14%**	**9%**	**10%**	**19%**	**20%**	**18%**	**27%**	**22%**	**18%**
2-3 times per month	17%	18%	8%	27%	27%	16%	7%	15%	23%
Once every month	19%	12%	27%	20%	12%	14%	13%	24%	0%
At least monthly	**50%**	**39%**	**46%**	**66%**	**59%**	**49%**	**48%**	**61%**	**41%**
Less often	49%	58%	52%	33%	40%	48%	52%	39%	59%
Can't recall	1%	2%	2%	1%	1%	4%	0%	0%	0%

Tracking the frequency of use since 2017 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. Although sample sizes are small, the tracking charts suggest that users of limousines and other hire vehicles may have been making more frequent use of these services in 2020.

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



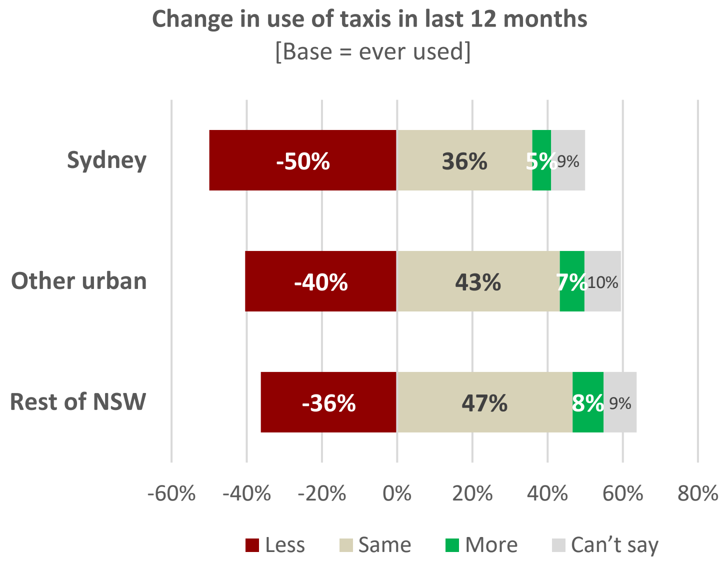
Note: Small sample sizes apply to the use of limousines and other hire vehicles (especially in the Rest of NSW sample), which largely accounts for the high degree of variability seen in that track.

Changes in Usage

Compared to the previous 12 months

Across the previous three surveys, there has been a trend for people who have ever used taxis and limousines or other hire vehicles to report a decrease in their use of these services; while people who have ever used rideshare were more likely to perceive their use is increasing. The 2019 survey suggested, along with other results, that the growth of rideshare was slowing in that 12-month period. The 2020 survey is marked by a dramatic reduction in the use of all point-to-point transport options compared to the previous year, which is to be expected in the COVID-influenced world of 2020. Unsurprisingly, the reasons given for using transport less are a combination of COVID-related reasons, and going out less / less need.

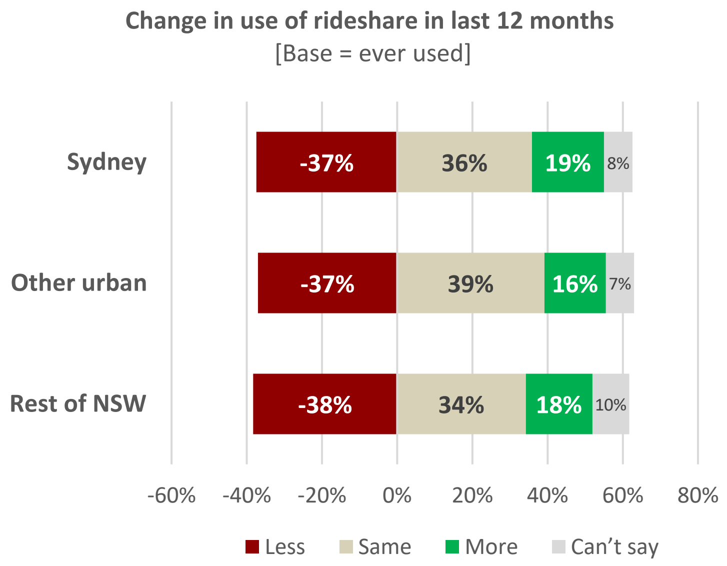
Figure 8: Change in use of transport services in the last 12 months amongst those who have ever used transport services Q16



Base = Used in last 12 months [Sydney n=1,752; Other Urban n=356; Rest of NSW n=266]

Use of taxis in all areas continued to drop, as per previous years – but by a considerable larger margin in 2020.

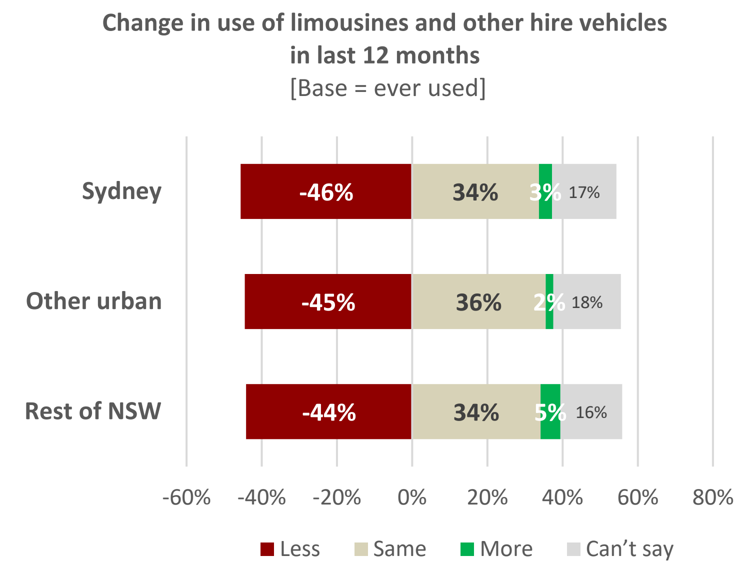
The **biggest nett decline** was in Sydney (-45% compared to the more 'organic' level of -26% in 2019). By comparison, the nett drops were -33% in Other Urban areas (-27% in 2019) and -28% in the rest of NSW (-20% in 2019).



Base = Used in last 12 months [Sydney n=1,428; Other Urban n=204; Rest of NSW n=78]

Amongst people who had ever used rideshare, the previous surveys have shown a nett positive movement.

However, the conditions of 2020 saw this drop to a **nett decline** in all areas. The nett differential in Sydney was -18% (compared to +22% in 2019). In Other Urban areas the decline was -21% (compared to +21% in 2019), and -20% in the rest of NSW (compared to +1% in 2019).



Base = Used in last 12 months [Sydney n=891; Other Urban n=207; Rest of NSW n=99]

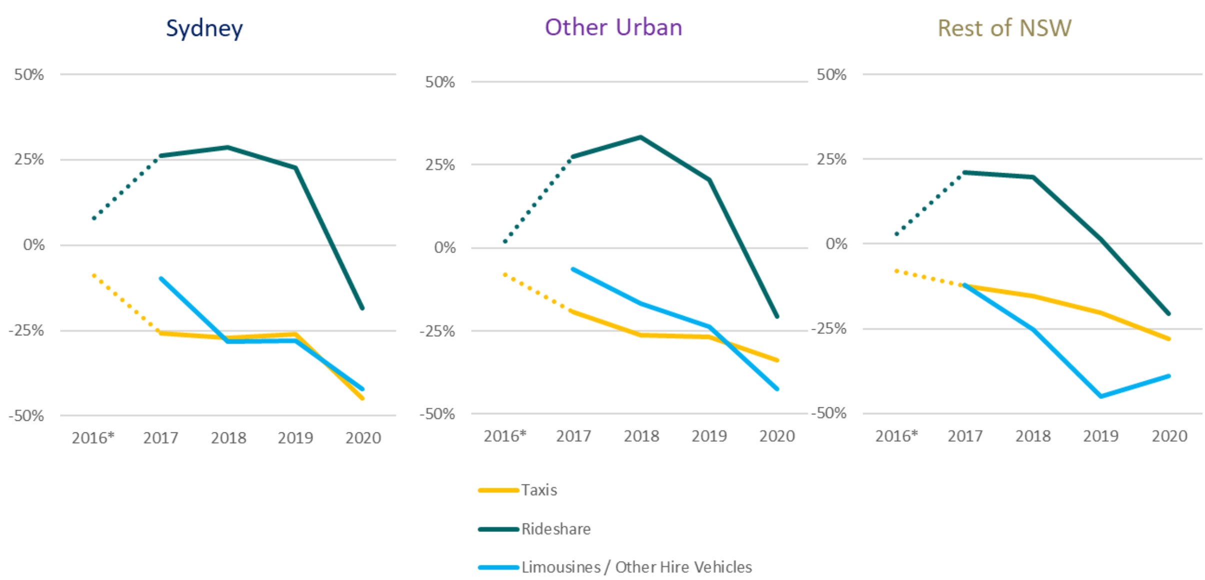
Like taxis, respondents who have ever used limousines or other hire vehicles have also report a **nett decline** in previous surveys (ie: they are doing so less often in the last 12 months).

Also like taxis, the nett negative differentials were generally much larger in 2020.

The nett changes were -43% in Sydney (compared to -28% in 2019), -43% in Other Urban (-24% in 2019), and -39% in the rest of NSW (-45% in 2029 – though this last figure was a lot higher than 2018, and the variability reflects the 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 (i.e: % 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.

Reasons for changes in use

Outside of Sydney there were few people using point-to-point transport more in 2020, with increased users of rideshare much more common than for taxis. For rideshare, the most common reasons cited for increased use remain around fares (less expensive, fare estimate in advance) and waiting times – which are the same reasons reported as in 2019.

For taxis, the main reasons were COVID-related, being less expensive, and greater primary need.

In Sydney, COVID-related reasons were cited by around 1-in-4 to 1-in-5 users of point-to-point transport who increased their use in 2020.

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 past 12 months / *Sample size*	Sydney *87*	Other urban *25*	Rest of NSW *21*	Sydney *268*	Other urban *33*	Rest of NSW *13*	Sydney *31*	Other urban *5*	Rest of NSW *4*
I find them **less expensive** than before	**25%**	18%	14%	**42%**	**39%**	21%	13%	12%	0%
I have **more disposable income**	12%	9%	20%	10%	7%	11%	22%	0%	**50%**
I'm **going out more** / needing to get around more	21%	24%	**39%**	21%	14%	**26%**	6%	24%	0%
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	20%	25%	5%	**37%**	**35%**	**25%**	7%	0%	**50%**
I have **less access to alternatives**	15%	**27%**	20%	11%	9%	8%	6%	0%	0%
Because the service for **booking taxis over the phone has improved**	12%	7%	4%						
Because it has become **easier to book taxis with apps** than it was	14%	7%	4%						
Because the **service for booking is better** than it used to be				21%	**33%**	**28%**	12%	0%	0%
I think drivers have become **less inclined to take longer routes or overcharge** me	9%	11%	4%	11%	12%	16%	6%	0%	0%
Because I get a **fare estimate quoted** in advance				**44%**	**46%**	**38%**	16%	**36%**	**50%**
I have found that **driver behaviour and knowledge** has improved in [my location]	11%	13%	5%	14%	11%	11%	17%	0%	0%
Because they were **not available previously** or I **did not know** about them before then	7%	6%	3%	7%	2%	15%	0%	0%	14%
Because of things related to **COVID**	**27%**	9%	18%	21%	1%	8%	22%	12%	0%
For **another reason**	21%	**29%**	23%	8%	13%	0%	25%	**28%**	**50%**

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	Nov 20
Sample size	335	292	333	302	351	323	296	305	122	177	151	87
I find them less expensive	8%	11%	12%	10%	17%	**23%**	18%	17%	13%	15%	**22%**	25%
I have more disposable income	19%	16%	16%	14%	**21%**	22%	17%	14%	14%	12%	17%	12%
Don't have to wait as long, or more likely to turn up after I have booked	**39%**	**43%**	**40%**	**39%**	**38%**	**37%**	**41%**	**32%**	**31%**	**29%**	**20%**	20%
Less access to alternatives when needed	18%	18%	17%	17%	20%	20%	**27%**	**23%**	14%	19%	**19%**	15%
Less access to alternatives when needed	**31%**	**27%**	**27%**	**25%**	**30%**	**29%**	**24%**	**23%**	11%	11%	11%	15%
The service for booking taxis over the phone has improved	11%	14%	15%	10%	15%	13%	21%	13%	11%	**25%**	13%	12%
Because it has become easier to book taxis with apps	13%	15%	18%	11%	14%	17%	22%	12%	**16%**	15%	16%	14%
Drivers less inclined to take longer routes or overcharge me	10%	8%	6%	5%	6%	9%	8%	8%	9%	10%	10%	9%
Driver behaviour and knowledge has improved in [Area}	8%	10%	6%	7%	8%	11%	10%	8%	15%	9%	14%	11%
Were not available previously / did not know about them before	-	-	-	-	-	-	-	-	1%	5%	3%	7%
COVID-related reasons	-	-	-	-	-	-	-	-	-	-	-	27%
For another reason	33%	24%	26%	27%	20%	19%	16%	17%	29%	31%	23%	21%

	Other urban							**Rest of NSW**						
	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20
Sample size:	51	54	55	20	26	32	25	27	29	26	31	31	31	21
Less expensive	14%	7%	13%	20%	10%	**28%**	18%	4%	7%	15%	6%	16%	13%	14%
More disposable income	14%	13%	16%	10%	2%	15%	9%	4%	10%	15%	10%	8%	17%	20%
Going out more	**37%**	20%	**29%**	**30%**	**29%**	**37%**	24%	**37%**	**41%**	**42%**	**39%**	21%	25%	**39%**
Don't have to wait as long	18%	17%	18%	10%	24%	25%	25%	7%	21%	15%	0%	0%	16%	5%
Less access to alternatives	**39%**	**33%**	**31%**	20%	15%	18%	**27%**	**26%**	**34%**	**27%**	23%	11%	20%	20%
Phone booking has improved	16%	11%	13%	15%	10%	16%	7%	7%	7%	19%	0%	2%	6%	4%
Easier to book taxis with apps	10%	7%	4%	5%	11%	20%	7%	11%	3%	12%	0%	10%	4%	4%
Drivers less inclined to take longer routes	12%	0%	7%	5%	6%	18%	11%	7%	10%	15%	0%	0%	7%	4%
Driver behaviour and knowledge improved	16%	7%	13%	10%	6%	12%	13%	11%	7%	19%	0%	7%	6%	5%
Not available (or known) previously	-	-	-	0%	0%	3%	6%	-	-	-	0%	0%	3%	3%
COVID-related	-	-	-	-	-	-	9%	-	-	-	-	-	-	18%
Another reason	**25%**	**37%**	20%	**30%**	**38%**	9%	**29%**	**41%**	24%	**42%**	**45%**	**40%**	**27%**	23%

Bold figures show the top 3 responses for each survey

Reasons for **using types of transport services *less*** in the last 12 months typically tend to show a similar overall story, albeit that they are not exactly the opposite. The patterns seen have been very stable from 2017 and 2019. Taxis are usually used less for cost reasons – feeling more expensive. In Sydney, and to a lesser extent in Other Urban areas, replacement of taxis with rideshare has also been 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. Relatively few respondents tend to have reduced their use of rideshare, but where this had happened in Sydney (the only location with a sufficient sample to really consider), this was mostly due to less need and greater availability of other options, rather than due to competitive perceptions.

Unsurprisingly across the types of transport, in 2020, COVID-related reasons and going out less / less need to get around have been the dominant reasons for lower use of point-to-point transport.

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 past 12 months	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*876*	*139*	*95*	*539*	*73*	*31*	*469*	*107*	*49*
I find them **more expensive** than before	**33%**	**29%**	**30%**	9%	15%	6%	17%	5%	12%
I have **less disposable income**	12%	10%	13%	12%	14%	11%	11%	6%	11%
Because **peak or surge pricing** makes them too expensive	10%	10%	5%	7%	10%	8%	4%	2%	2%
I'm **going out less** / have less need to get around	**43%**	**42%**	**40%**	**46%**	**42%**	**41%**	**26%**	**30%**	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	14%	14%	5%	2%	7%	2%	1%	2%	0%
I have **better access to a car**	17%	**34%**	**28%**	14%	**28%**	24%	15%	12%	16%
Public transport has improved when I need it	19%	6%	2%	13%	6%	0%	10%	3%	0%
I **use taxis** instead				3%	0%	4%	6%	3%	0%
I **use limousine or other hire vehicle** services instead	2%	2%	1%	1%	3%	0%			
I **use rideshare** services instead	**33%**	21%	12%				15%	11%	5%
I **use car share, community transport** or **courtesy buses** instead	3%	1%	3%	1%	1%	0%	2%	0%	0%
Because **booking services have become worse**	4%	4%	3%	2%	2%	2%	1%	2%	0%
I have found that **driver behaviour and knowledge** has become worse in [AREA]	10%	10%	4%	2%	0%	7%	19%	14%	9%
I think drivers have become more inclined to **take longer routes or overcharge** me	12%	12%	8%	2%	0%	2%	2%	2%	2%
I have found that **driver behaviour and knowledge** has become worse in [AREA]	10%	10%	4%	2%	0%	7%	19%	14%	9%
Because of things related to **COVID**	**42%**	**39%**	**28%**	**62%**	**48%**	**52%**	**32%**	**39%**	**31%**
For **another reason**	7%	10%	13%	4%	5%	15%	12%	20%	16%

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?

	Nov 13	Feb 14	Nov 14	Feb 15	Nov 15	Feb 16	Nov 16	Feb 17	Nov 17	Nov 18	Nov 19	Nov 20
Sample size:	308	344	367	321	367	325	394	379	312	697	638	876
I find them more expensive than before	**59%**	**51%**	**50%**	**54%**	**53%**	**60%**	**53%**	**60%**	**46%**	**47%**	**50%**	**33%**
I have less disposable income	**29%**	22%	22%	22%	21%	23%	17%	13%	8%	11%	10%	12%
Because peak or surge pricing makes them too expensive	-	-	-	-	-	-	-	-	11%	13%	17%	10%
I'm going out less / have less need to get around	**36%**	**34%**	**32%**	**37%**	**35%**	**32%**	**28%**	**29%**	13%	19%	18%	**43%**
Have to wait longer / unreliable bookings	17%	13%	16%	16%	14%	18%	22%	**26%**	23%	**25%**	21%	14%
I have better access to a car	**27%**	17%	**27%**	20%	22%	17%	16%	23%	22%	19%	17%	17%
Public transport has improved	22%	23%	**25%**	**26%**	23%	24%	23%	21%	24%	23%	22%	19%
Use limousine/other hire vehicle	-	-	-	-	-	-	-	-	4%	6%	3%	2%
Use rideshare	-	-	-	-	16%	22%	**31%**	**39%**	**37%**	**41%**	**44%**	**33%**
Use car share, community transport or courtesy buses	-	-	-	-	13%	16%	6%	5%	5%	3%	3%	3%
Because booking services have become worse	6%	6%	6%	5%	4%	5%	7%	7%	7%	8%	7%	4%
Drivers more inclined to take longer routes/overcharge	21%	17%	16%	16%	18%	16%	16%	19%	23%	24%	19%	12%
Driver behaviour/ knowledge worse	**26%**	13%	16%	13%	14%	14%	16%	19%	18%	21%	16%	10%
COVID-related reasons	-	-	-	-	-	-	-	-	-	-	-	**42%**
For another reason	7%	14%	11%	9%	7%	6%	8%	4%	10%	9%	11%	7%

	Other urban							Rest of NSW						
	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20
Sample size:	46	62	54	41	130	144	139	29	22	17	27	82	101	95
More expensive	**39%**	**48%**	**43%**	**56%**	**41%**	**46%**	**29%**	**34%**	**41%**	**47%**	**63%**	**41%**	**39%**	**30%**
Less disposable income	**35%**	**27%**	**26%**	17%	16%	17%	10%	24%	**32%**	18%	26%	14%	14%	13%
Peak or surge pricing	-	-	-	**27%**	11%	13%	10%	-	-	-	19%	8%	13%	5%
Going out less	**43%**	**34%**	**43%**	**27%**	23%	**26%**	**42%**	**45%**	**36%**	**59%**	**44%**	**28%**	**34%**	**40%**
Have to wait longer	11%	16%	19%	17%	22%	17%	14%	3%	5%	6%	22%	12%	5%	5%
Better access to a car	20%	**34%**	**39%**	20%	**31%**	**27%**	**34%**	**48%**	**27%**	**35%**	15%	**45%**	**36%**	**28%**
Public transport improved	11%	10%	15%	10%	16%	14%	6%	3%	5%	6%	15%	5%	6%	2%
Use limousine/other hire vehicle	-	-	-	7%	3%	3%	2%	-	-	-	0%	2%	0%	1%
Use rideshare	-	5%	19%	**29%**	23%	**32%**	21%	-	0%	0%	**33%**	9%	12%	12%
Use car share, community transport or courtesy buses	-	10%	4%	7%	4%	4%	1%	-	14%	6%	4%	4%	1%	3%
Booking services have become worse	2%	6%	7%	20%	9%	6%	4%	3%	0%	0%	15%	7%	3%	3%
Drivers more inclined to take longer routes	9%	8%	13%	22%	13%	5%	12%	7%	0%	6%	15%	5%	3%	8%
Driver behaviour/ knowledge worse	7%	5%	9%	24%	16%	8%	10%	3%	0%	18%	11%	9%	5%	4%
COVID-related reasons	-	-	-	-	-	-	**39%**	-	-	-	-	-	-	**28%**
Another reason	7%	3%	6%	15%	7%	9%	10%	3%	9%	18%	4%	9%	11%	13%

Bold figures show the top 3 responses for each survey

The previous tables reflect the standard reasons included in the annual survey for using point-to-point transport options more or less in the last 12 months, with an additional option of 'COVID related reasons' to reflect the 2020 experience.

However, it was also felt important to have an explicit indication from respondents as well as to what proportion of their change in use was due to COVID. Two additional, new (and perhaps one-off) questions were included in the 2020 survey.

Interestingly, COVID was a reasonably substantial consideration amongst those people who used point-to-point transport options more in 2020, especially in Sydney.

More predictably, it was also a very common consideration for the much larger proportion of respondents who used point-to-point transport options less in 2020. Again, this was somewhat higher in Sydney, but it was also a much more common reason for respondents to use rideshare less than to use taxis less. At face value, this suggests that a higher proportion of taxi users would have reduced their use of taxis even without the intervention of COVID in the year.

Supplementary Figure: Impact of COVID as a reason for using transport services more or less in the last 12 months Q18a/Q19a

Extent to which increased use is…	Taxis			Rideshare			Limousines or other hire vehicles		
Base: Respondents reporting increased use	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*87*	*25*	*21*	*268*	*33*	*13*	*31*	*5*	*4*
Completely related to COVID	15%	8%	4%	8%	0%	5%	26%	12%	0%
Mostly related	21%	17%	14%	15%	10%	15%	23%	12%	50%
Somewhat related	26%	15%	17%	24%	26%	23%	19%	0%	0%
At least somewhat related	**62%**	**40%**	**34%**	**47%**	**36%**	**42%**	**68%**	**24%**	**50%**
Not very much related	15%	19%	17%	20%	21%	13%	13%	24%	0%
Not at all related to COVID	23%	41%	50%	33%	43%	45%	19%	52%	50%
Not very or not at all related	38%	60%	66%	53%	64%	58%	32%	76%	50%

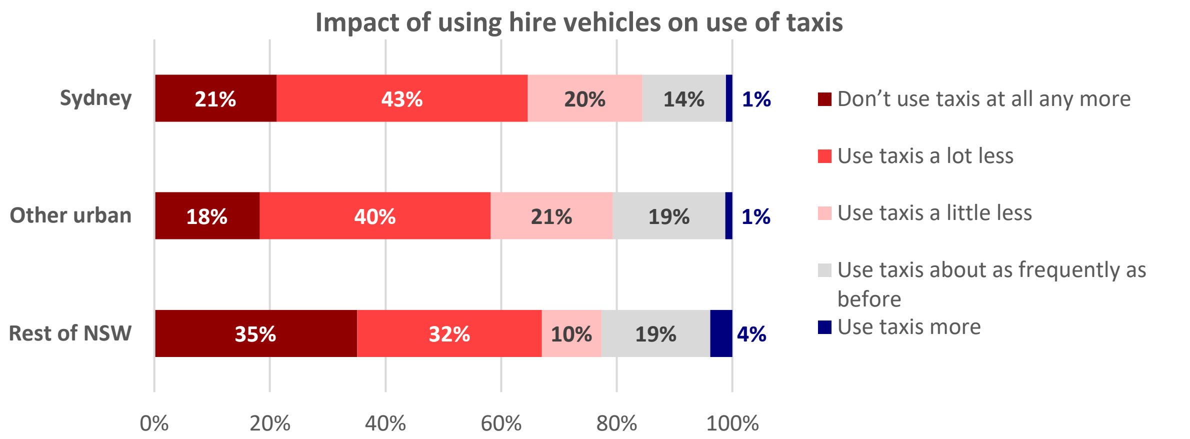
Extent to which decreased use is…	Taxis			Rideshare			Limousines or other hire vehicles		
Base: Respondents reporting decreased use	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*876*	*139*	*95*	*539*	*73*	*31*	*408*	*98*	*46*
Completely related to COVID	24%	20%	22%	39%	25%	38%	25%	33%	19%
Mostly related	17%	18%	11%	28%	24%	15%	14%	18%	17%
Somewhat related	20%	12%	13%	16%	26%	16%	12%	12%	17%
At least somewhat related	**62%**	**50%**	**46%**	**83%**	**75%**	**69%**	**52%**	**63%**	**53%**
Not very much related	13%	16%	14%	7%	5%	9%	13%	10%	11%
Not at all related to COVID	26%	34%	40%	10%	19%	22%	35%	27%	36%
Not very or not at all related	38%	50%	54%	17%	25%	31%	48%	37%	47%

Impact of using hire vehicles in the last 6 months

Given the ongoing trend of 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.

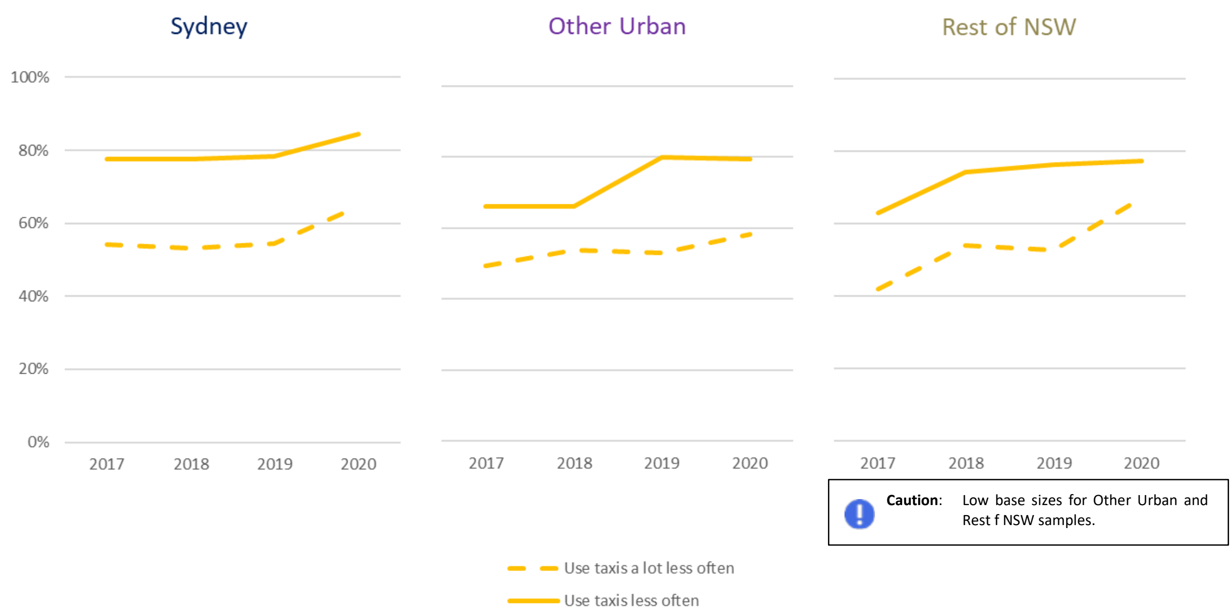
It shows that across the three locations, 18%-35% of respondents now no longer use taxis at all, and that more than three-quarters reported at least some level of decline in their taxi usage *as a result of* using hire vehicles. While the exact magnitudes vary somewhat, the general pattern of the results observed is quite consistent across locations. The proportion who use taxis *a lot less often* was higher across all locations in 2020, as was the total proportion using taxis less often in Sydney.

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=844; Other Urban n=91; Rest of NSW n=34]

Figure 13: Changes in reported impact of using hire vehicles on the use of taxis amongst users of both services (proportion of taxi users whose use has declined) Q17



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

Problems

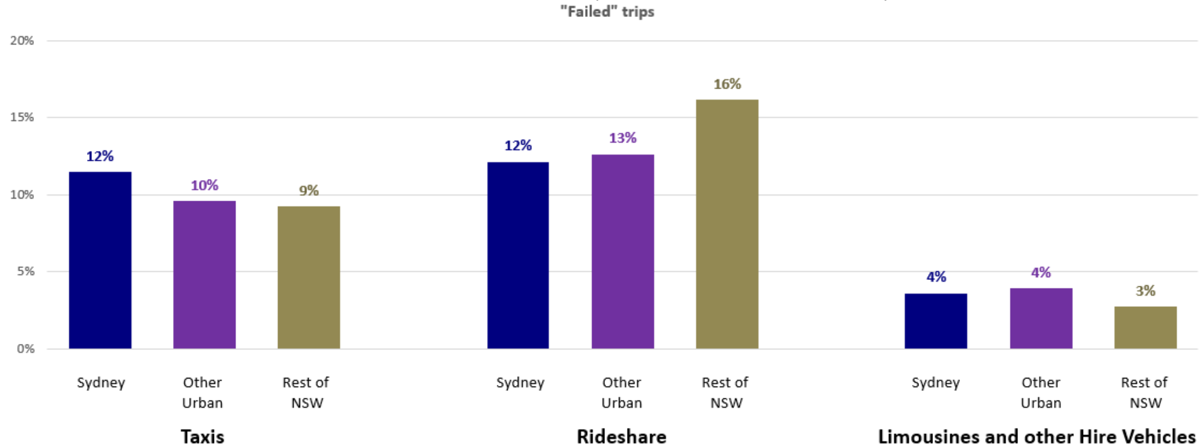
Failed Trips

Of those aware of the services operating in their area

Small but noticeable minorities of respondents in each location typically report '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 have been approximately comparable.

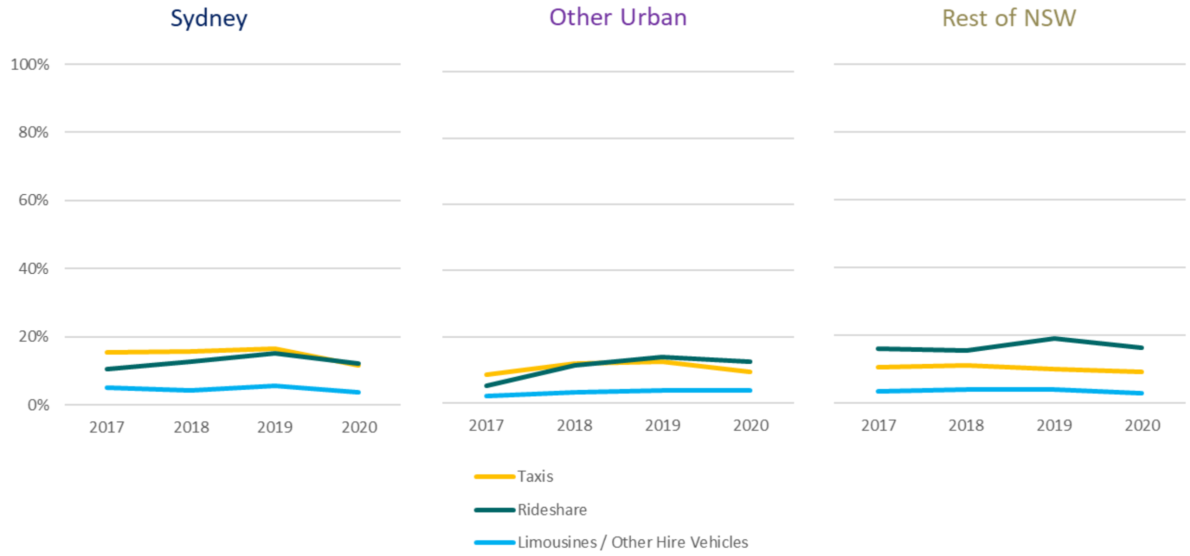
In Sydney, 12% of those aware of both taxis and rideshare services reported such a failed trip in the last 6 months, with both figures slightly lower than in 2019. In Other Urban areas, failed rideshare attempts were slightly more common in 2020, and more common again in the rest of NSW. Given the relative availability of rideshare and taxi services across these regions in 2020, these patterns are reasonably intuitive. The tracking charts below show that relatively speaking, failed trips have been becoming somewhat more prevalent with rideshare.

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=1,589-1,962; Other Urban n=373-480; Rest of NSW n=191-378]

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



All respondents

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

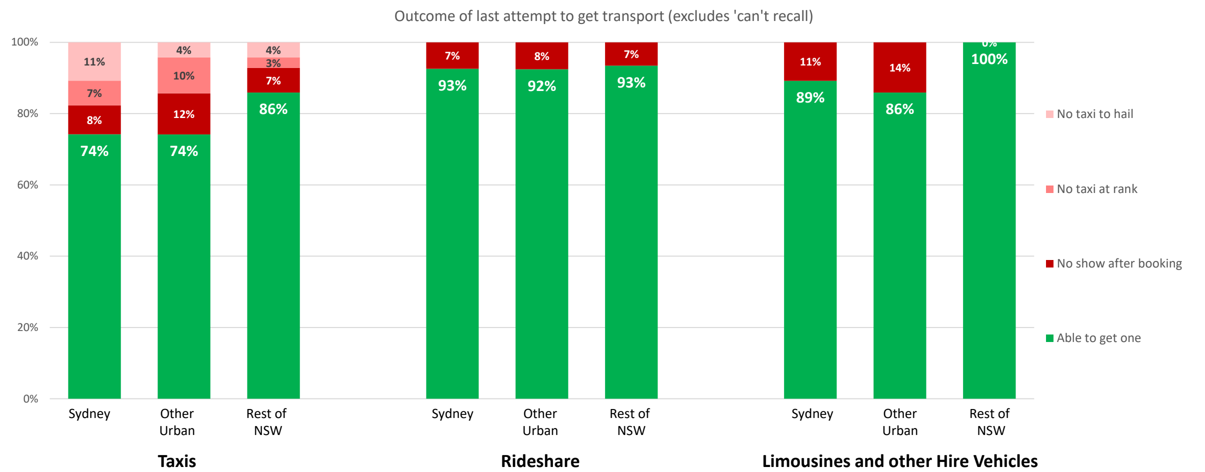
Use in the last 6 months		Taxis			Rideshare services			Limousines or other hire vehicles		
		Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
% of those aware of service in location	**2020**	**12%**	**10%**	**9%**	**12%**	**13%**	**16%**	**4%**	**4%**	**3%**
	Sample size	*1,962*	*480*	*378*	*1,909*	*400*	*191*	*1,589*	*373*	*203*
	2019	17%	13%	10%	15%	14%	19%	6%	4%	4%
	Sample size	*2,040*	*495*	*415*	*1,968*	*420*	*197*	*1,626*	*396*	*227*
	2018	16%	12%	11%	13%	11%	15%	4%	3%	4%
	Sample size	*2,104*	*523*	*438*	*2,015*	*409*	*205*	*1,784*	*432*	*247*
	2017	15%	9%	11%	11%	5%	16%	5%	2%	3%
	Sample size	*2,009*	*487*	*415*	*1,825*	*297*	*131*	*1,686*	*374*	*202*
% of all respondents	**2020**	**11%**	**9%**	**8%**	**11%**	**10%**	**8%**	**3%**	**3%**	**1%**
	Sample size	*2,026*	*508*	*407*	*2,026*	*508*	*407*	*2,026*	*508*	*407*
	2019	16%	12%	9%	14%	11%	8%	4%	3%	2%
	Sample size	*2,095*	*522*	*446*	*2,095*	*522*	*446*	*2,095*	*522*	*446*
	2018	15%	12%	10%	12%	9%	7%	4%	3%	2%
	Sample size	*2,147*	*533*	*478*	*2,147*	*533*	*478*	*2,147*	*533*	*478*
	2017	15%	8%	10%	9%	3%	5%	4%	2%	2%
	Sample size	*2,048*	*501*	*453*	*2,048*	*501*	*453*	*2,048*	*501*	*453*

Outcome of last attempt

On the very last occasion respondents tried to use point-to-point transport, the majority were successful. However, small minorities generally experience difficulties in getting transport. Despite the population figures now showing greater use of rideshare (in Sydney it was the most common point-to-point transport choice used), last trip difficulties remain more common for taxis than for either of the other services – though in part this is because there are more ways for taxi trips to be problematic due to the variety of ways they can be sourced.

In 2020, successful outcomes were slightly *less* common for taxis in Sydney (-4%) and Other Urban areas (-6%) compared to 2019, while remained unchanged or slightly *more* common for rideshare.

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



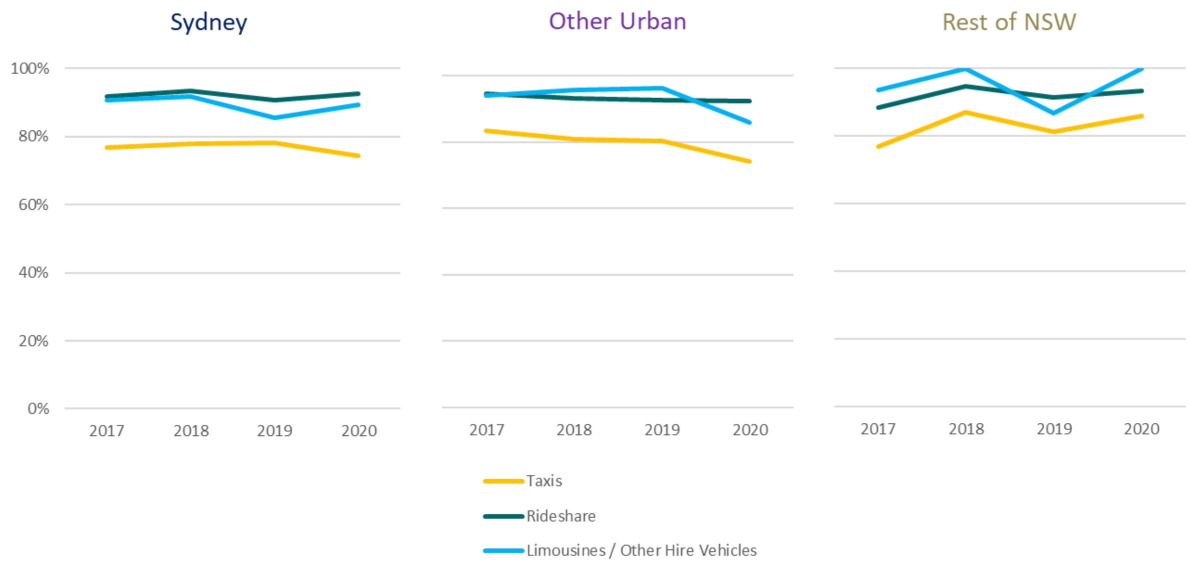
Base = Used services in the last 12 months, excludes 'can't recall outcome' responses
[Sydney n=241-1,047; Other Urban n=45-178; Rest of NSW n=19-124]

Taxis had the lowest success rate, ranging from 74% to 86% across locations – as seen in previous surveys. 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%-8% (unchanged from 2019), and taxis a slightly higher failure rate of 8%-14% across locations (slightly higher than the 8%-10% fail rate in 2019).

The tracking chart below shows just the overall success / failure rates (note that sample sizes are smaller, and results are naturally more variable in the rest of NSW region). In Sydney and Other Urban areas, the overall success rates for both taxis and rideshare did not change substantially from 2017-19, but the slow trends discussed above are visible as small effects in the larger patterns. In 2020, the success rates for taxis in these two regions have dropped slightly, while rideshare remained steady.

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 7-23% of the time when a taxi was unavailable, and 0-16% of the time when rideshare services were unable to be accessed.

In Sydney, taxis and rideshare pick up a substantial proportion of the cases where the other was not able to be used, with public transport and self-travel covering most other cases. In keeping with the general pattern in 2020, rideshare picked up an increased proportion of failed taxi trips (38% vs 29%) than the reverse (23% vs 23%) compared to 2019. Alternative solutions remain fairly similar across taxis and rideshare. For those unable to get a limousine or other hire vehicle, compared to 2019 there was also a tendency to use rideshare (23% in 2020 compared to 14% in 2019), compared to using taxis (14% in both years).

In other urban areas, a broadly similar pattern is also seen, but predictably with 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**			When last unable to get a **limousines or other hire vehicle**		
Base: *Combined responses from any 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	*227*	*36*	*29*	*230*	*41*	*26*	*57*	*12*	*4*
Decided not to make the journey at all	17%	23%	5%	16%	10%	0%	12%	17%	0%
Took a train	**42%**	**20%**	14%	**42%**	12%	10%	**34%**	12%	0%
Used a rideshare service instead	**38%**	**32%**	14%				**23%**	6%	0%
Took a regular bus (ie, not a courtesy bus)	**28%**	16%	10%	**28%**	19%	**22%**	19%	22%	0%
Drove myself or got a lift	**21%**	**31%**	**32%**	**23%**	**41%**	**59%**	**24%**	18%	**27%**
Walked or cycled	18%	**29%**	**27%**	**21%**	**22%**	9%	**20%**	12%	0%
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	14%	6%	10%	11%	3%	7%	18%	21%	0%
Used a limousine or other hire vehicle service	13%	5%	4%	7%	3%	2%			
Used courtesy transport provided by a venue such as a pub or club	8%	7%	2%	8%	6%	13%	14%	10%	0%
Used a bikeshare service	6%	0%	7%	10%	5%	0%	7%	0%	0%
Used a car sharing service such as GoGet or Car Next Door	6%	0%	7%	6%	3%	0%	5%	0%	0%
Used a taxi instead				**23%**	**31%**	**45%**	13%	**22%**	15%
Something else	9%	1%	9%	10%	4%	2%	8%	18%	0%
Can't recall	5%	5%	8%	7%	5%	0%	6%	6%	**59%**

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 from around 2016, becoming more apparent in Other Urban areas and the rest of NSW in the data since 2017 when the new methodology was more sensitive to this pattern. The 2020 figures were the highest yet observed in Sydney and Other Urban areas.

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 relatively low compared to previous results. In 2020, both trains and regular buses were more commonly reported amongst people not using taxis.

NOTES: * November 2016 asked the question as a single response and is not directly comparable with other years. Note low n values for Other Urban and 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	Nov-20
Sample size	*209*	*120*	*254*	*199*	*279*	*266*	*248**	*224*	*311*	*469*	*453*	*227*
Took a train	**31%**	**34%**	**36%**	**29%**	**33%**	**35%**	29%	**29%**	**35%**	**22%**	**33%**	**42%**
Used a rideshare service instead			2%	2%	3%	8%	12%	21%	**32%**	**31%**	**29%**	**38%**
Took a regular bus	**32%**	**26%**	**28%**	**40%**	**30%**	**27%**	17%	**25%**	**25%**	**21%**	**21%**	**28%**
Drove myself or got a lift	**23%**	**22%**	**22%**	**19%**	**20%**	16%	15%	**21%**	24%	19%	17%	21%
Walked or cycled	17%	18%	15%	14%	18%	14%	9%	9%	18%	14%	14%	18%
Decided not to make the journey at all	12%	17%	12%	9%	13%	**18%**	8%	8%	12%	10%	14%	17%
Used community transport	6%	2%	8%	8%	10%	7%	6%	8%	12%	9%	9%	14%
Used a limo or other hire vehicle service	2%	3%	3%	3%	7%	7%	2%	7%	10%	7%	7%	13%
Used courtesy transport					2%	2%	0%	2%	8%	5%	8%	8%
Used a bike sharing service										6%	6%	6%
Used a car sharing service			2%	1%	3%	3%	1%	3%	9%	4%	5%	6%
Something else									8%	8%	8%	9%
Can't recall									8%	4%	5%	5%

	Other Urban							Rest of NSW						
	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-20	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-20
Sample size	*39*	*47*	*23**	*42*	*85*	*87*	*36*	*9*	*13*	*6**	*44*	*61*	*64*	*29*
Took a train	13%	11%	9%	24%	**17%**	16%	20%	0%	0%	0%	14%	9%	**15%**	14%
Used a rideshare service instead	0%	4%	4%	17%	**17%**	**25%**	**32%**	0%	0%	0%	14%	**15%**	10%	**14%**
Took a regular bus	**28%**	**23%**	35%	**14%**	**18%**	**18%**	**16%**	33%	8%	17%	9%	12%	13%	**10%**
Drove myself or got a lift	**28%**	**36%**	22%	**29%**	**30%**	**22%**	**31%**	33%	8%	33%	**27%**	**15%**	**18%**	**32%**
Walked or cycled	21%	13%	13%	**31%**	15%	13%	29%	22%	62%	33%	**32%**	**31%**	**16%**	27%
No journey	**23%**	**17%**	9%	14%	9%	12%	23%	11%	15%	17%	20%	10%	**15%**	5%
Used community transport	8%	11%	4%	7%	3%	7%	6%	0%	0%	0%	7%	3%	7%	10%
Used a limo or other hire vehicle service	3%	4%	4%	10%	9%	2%	5%	0%	0%	0%	5%	1%	3%	4%
Used courtesy transport		4%	0%	5%	5%	7%	7%		8%	0%	2%	4%	7%	2%
Used a bike sharing service					0%	3%	0%					0%	5%	7%
Used a car sharing service	0%	0%	0%	7%	0%	2%	0%	0%	0%	0%	5%	0%	4%	7%
Something else				2%	4%	9%	1%				**9%**	7%	5%	9%
Can't recall				14%	2%	5%	5%				14%	9%	5%	8%

Bold figures show the top 3 responses in each survey

Problems Experienced

Respondents in Sydney have typically reported a higher level of problems than those in Other Urban areas or the rest of NSW in each year, particularly with respect to taxis. In all 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. In 2020, the gap between the two increased slightly in Sydney, but closed to being negligible in Other Urban areas.

Only 36% of Sydney taxi users did not report at least one problem experienced in the last 12 months, compared to 38% in 2017, 35% in 2018 and 40% in 2019. 50% of taxi users in Other Urban areas (49% in 2019) and 66% in the rest of NSW (70% in 2019) reported no problems. The proportion of rideshare users reporting no problems was 14% higher than for taxis in Sydney, but only 3-4% higher in Other Urban areas and the rest of NSW.

Route knowledge was the most common problem for taxi users, along with price-related issues. Peak or surge pricing was the most common issue for rideshare users. COVID cleanliness or hygiene was an issue for some users, but only exceeded 10% for taxi users in Sydney.

No respondents identified serious inappropriate or illegal actions in 2018, 2019 or 2020.

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

NOTE: Small bases sizes for Rest of NSW.

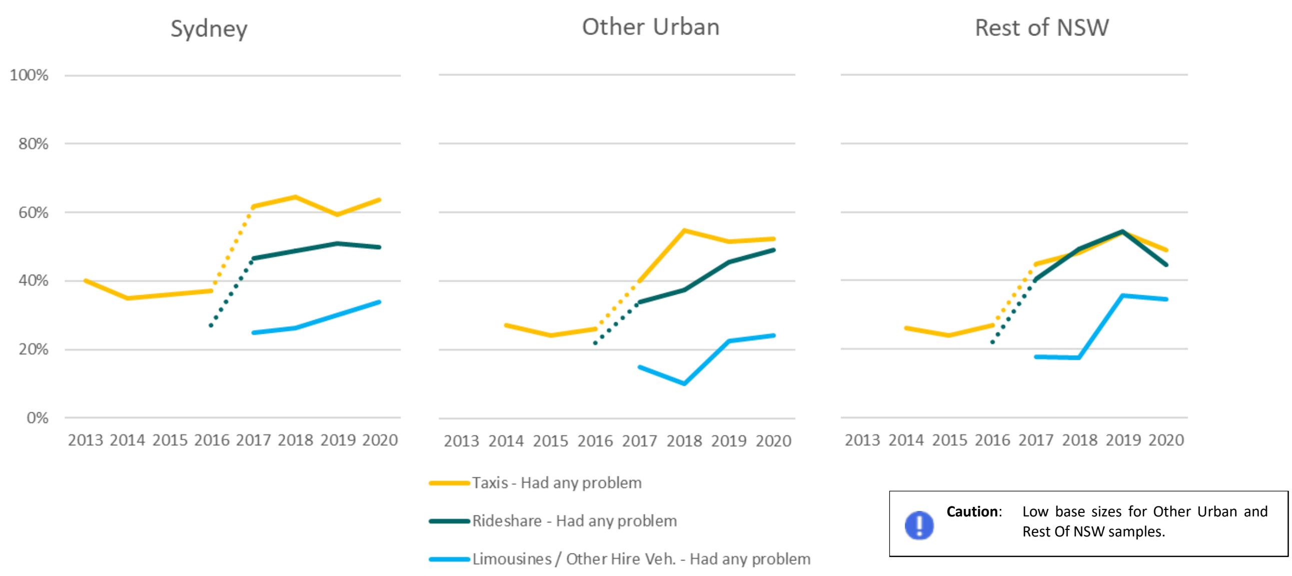
Problems experienced using point-to-point transport *Multiple responses allowed, so columns add to more than 100%*	Using **taxis**			Using **rideshare services**			Using **limousines** or **other hire vehicles**		
Base = used service more in past 12 months	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*1,034*	*182*	*131*	*1,148*	*149*	*58*	*282*	*56*	*27*
Had **no problems**	**36%**	**48%**	**51%**	**50%**	**51%**	**55%**	**66%**	**76%**	**66%**
Driver did not take the most **direct** route	**23%**	**15%**	**16%**	**15%**	8%	11%	6%	0%	15%
Driver did not know **where they were going**	**23%**	11%	13%	13%	6%	5%	4%	2%	0%
Difficulty getting one at a **major event**	**20%**	**17%**	**16%**	10%	**15%**	**16%**	7%	8%	12%
I was **overcharged**	**18%**	11%	5%	7%	10%	6%	9%	3%	5%
Peak or surge **price**	**17%**	**17%**	**18%**	**18%**	**21%**	8%	7%	2%	6%
COVID-19 cleanliness or hygiene	**16%**	9%	10%	10%	7%	5%	4%	1%	6%
Difficulty getting one at some **other time**	**15%**	14%	12%	9%	11%	6%	7%	6%	0%
Driver was **rude, unhelpful** or **offensive**	12%	6%	7%	5%	4%	3%	5%	5%	9%
Unsafe (driving manner, breaking road rules)	10%	8%	3%	7%	7%	5%	1%	1%	0%
Driver **refused destination**	8%	2%	0%	2%	3%	0%	3%	0%	0%
Something else	3%	5%	3%	4%	3%	7%	3%	6%	5%

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 2020 across Sydney and Other Urban areas, there was a tendency for somewhat more users to indicate at least some sort of problem with taxis than with rideshare services, and in all areas, limousines and other hire vehicles have the lowest frequency of problems. In 2020, the gap between taxis and rideshare grew again after closing to the lowest level in 2019. In Other Urban areas where use of rideshare is still in more of a growth phase, the relative prevalence of problems amongst taxi users and rideshare users was negligible in 2020.

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



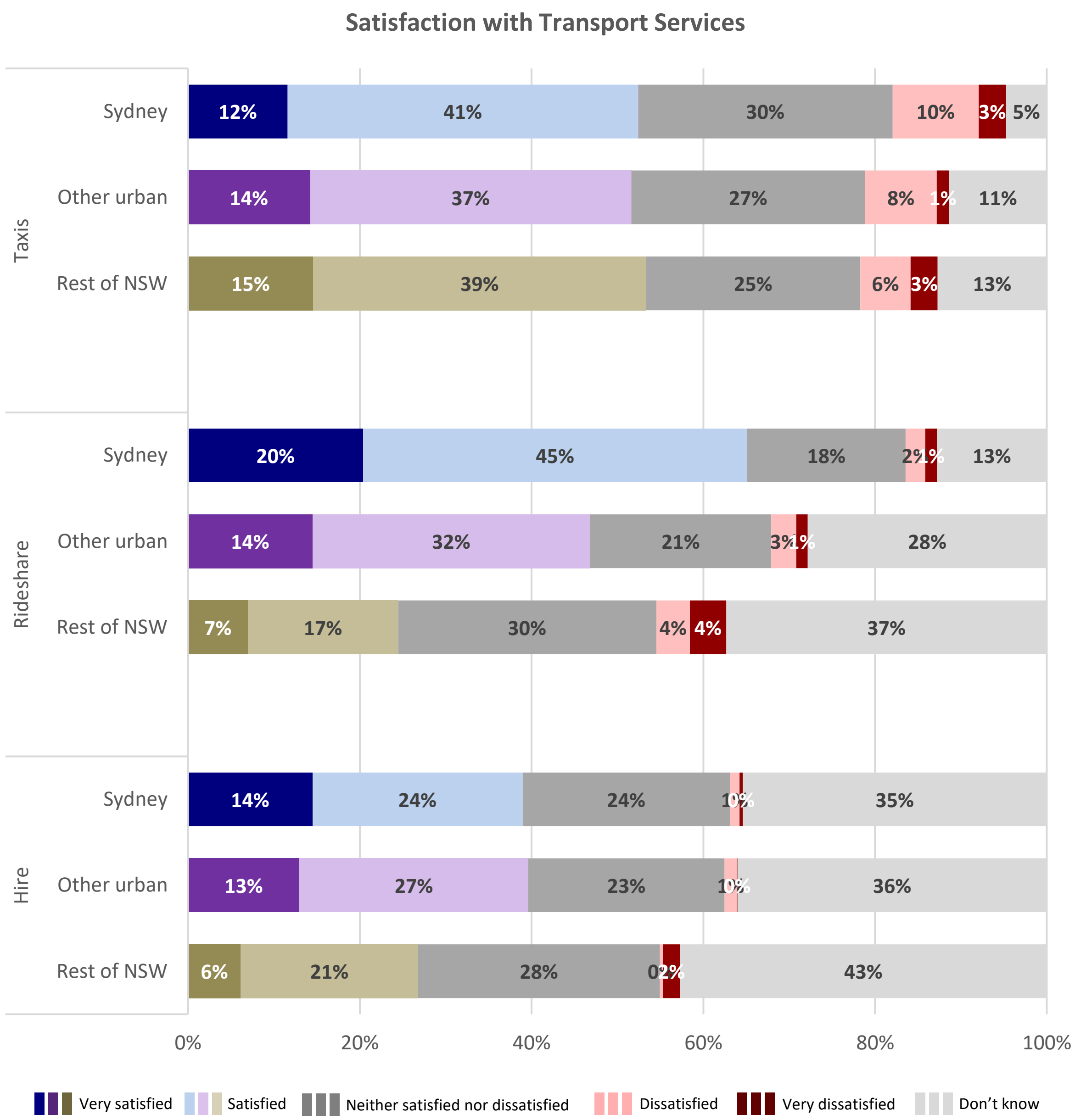
Satisfaction with Services

Satisfaction with the available taxi services amongst all respondents (i.e. not just users) remains moderately strong, and approximately equal across Sydney, other urban areas and the rest of NSW.

Satisfaction with rideshare in Sydney is substantially higher than for taxis, for the first time. Satisfaction with rideshare and taxis is similar in Other Urban areas, but considerably higher for taxis in the rest of NSW.

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.

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



	Taxis			Rideshare			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	*2026*	*508*	*407*	*2026*	*508*	*407*	*2026*	*508*	*407*
Satisfied	52%	52%	53%	65%	47%	24%	39%	40%	27%
Dissatisfied	13%	10%	9%	4%	4%	8%	2%	2%	2%
Differential	+39%	+42%	+44%	+61%	+43%	+16%	+37%	+38%	+24%
Compared to 2019	*-9%*	*-8%*	*-7%*	*+4%*	*+1%*	*-1%*	*-1%*	*-3%*	*-2%*

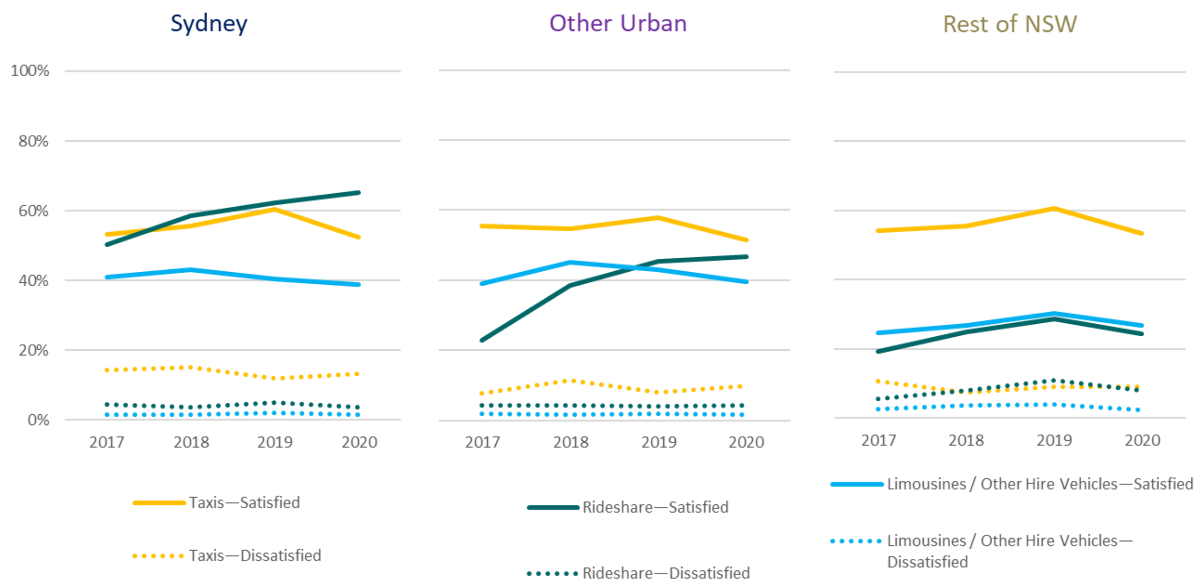
Base = All respondents [Sydney n=2,026; Other Urban n=508; Rest of NSW n=407]

* 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 showed a plateauing of penetration and use of rideshare services, satisfaction with available rideshare services continued to increase. At the same time, satisfaction with taxi services had also increased and active dissatisfaction reduced slightly.

In 2020 satisfaction with taxi services in all locations decreased, while satisfaction with rideshare services continued to grow in Sydney and Other Urban areas. As a result, satisfaction with rideshare in Sydney (65%) was substantially higher than for taxis (52%). In Other Urban areas, satisfaction with taxis (52%) remained just slightly higher than for rideshare (47%).

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
Hygiene during COVID [New in 2020]	

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 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 have been perceived across the three survey locations, but there are some nuances. Both the macro patterns and the tone of the nuances have been consistent – suggesting that even though there has been substantial changes in the marketplace dynamics in recent years, perceptions of the fundamental characteristics and strengths of the transport services have not changed greatly.

The key consistencies seen are:

- Rideshare tends to be the leader in the practical dimensions. 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 the leader in quality dimensions, seen as having relative strengths in terms of the 'quality' dimensions plus *safety*. They have a relative weakness in terms of *value*, and are lower in *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 2019 (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.

On the new hygiene during COVID dimension, limousines and other hire vehicles were rated highest, with rideshare rated higher than taxis in Sydney and Other Urban areas.

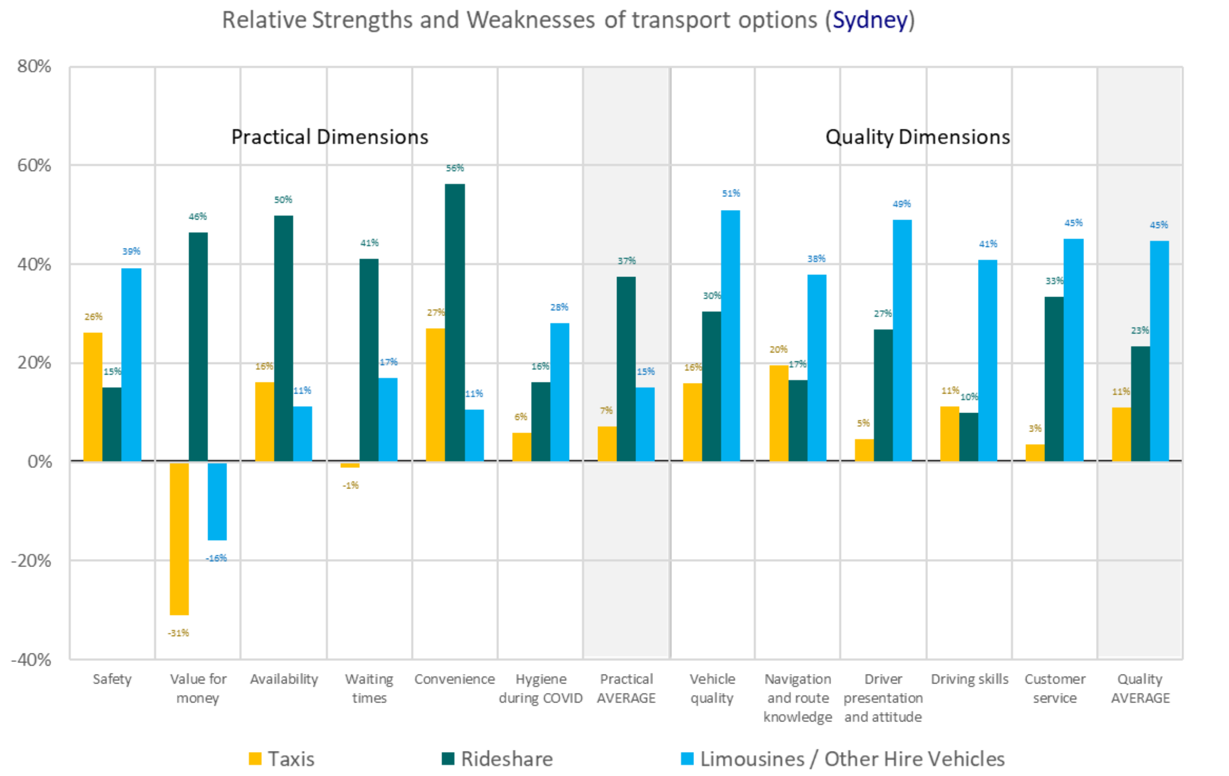
Perceptions of the three different types of services have been consistent across the years these items have been included in the survey. These charts show the nett differential rating, being the difference between the proportions who say each dimension is a strength minus those who say it is a weakness. A positive differential indicates more people think of the dimension as a strength, and a negative differential indicates more people think of a dimension as a weakness.

In Sydney, taxis still have the lowest or equal lowest differential scores for every quality dimension, and all bar *convenience* and *safety* amongst the practical dimensions. In 2020 taxis only had a negative differential for one dimension – *value*, though were also at -1% on *waiting times*. *Safety* is the only dimension that taxis are rated more strongly than rideshare.

Rideshare has a very strong positive differentiation on *value*, but also all other practical dimensions except for *safety*, and scores higher than taxis on the new *hygiene during COVID* dimension. Rideshare doesn't match limousines and other hire vehicles on the quality dimensions, but is clearly ahead of taxis for *vehicle quality, 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 – and these macro patterns are all as per what has been seen previously.

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=1,962; Rideshare n=1,909; Limo / Other n=1,589]

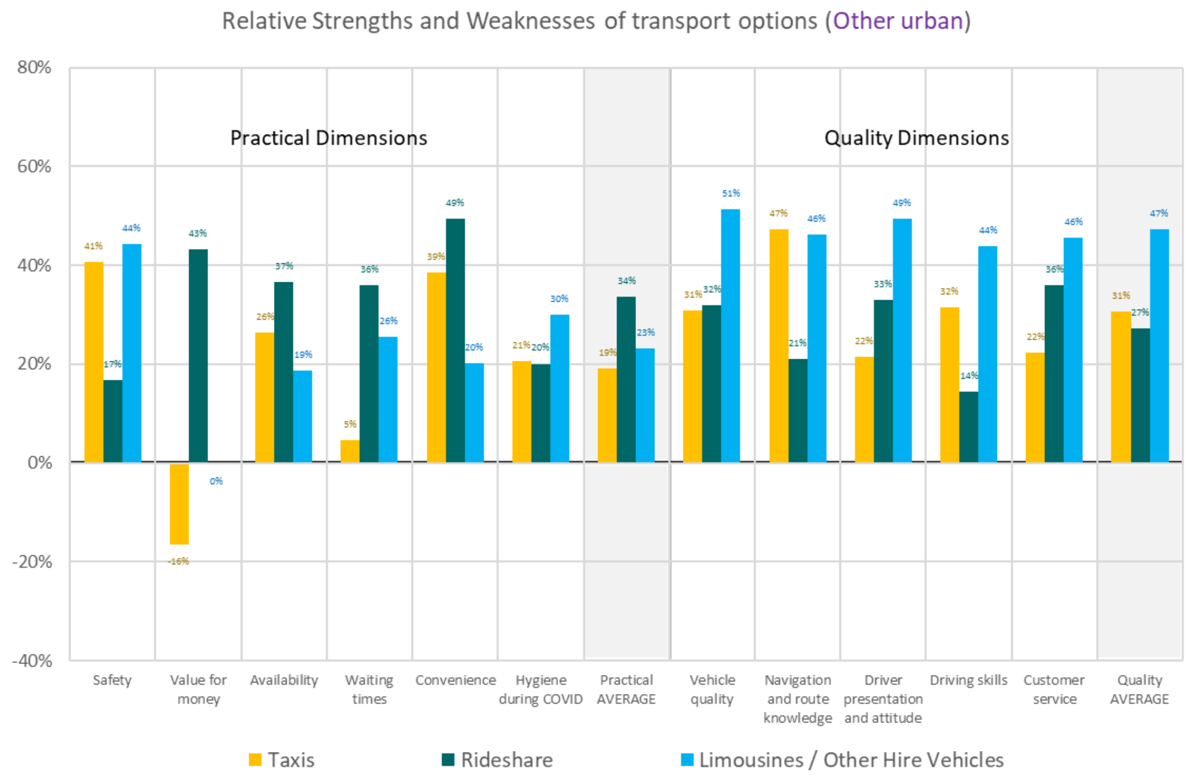
Charts show 'differential' scores calculated as '% strength' minus '% weakness'

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'.

Compared to Sydney, in Other Urban areas taxis are rated more positively on a number of dimensions. This is best summarised by the averages of both the practical and quality dimensions. The practical average in Other Urban areas is 19% compared to 7% in Sydney, and the quality average is 31% compared to 11%. By comparison, the rideshare practical average is 34% in Other Urban areas, 3% lower than the 37% in Sydney, while the rideshare quality average is only 4% higher in Other Urban areas (27% compared to 23%).

While the differentials between taxis and rideshare are not quite as high in other urban areas compared to Sydney, the overall 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



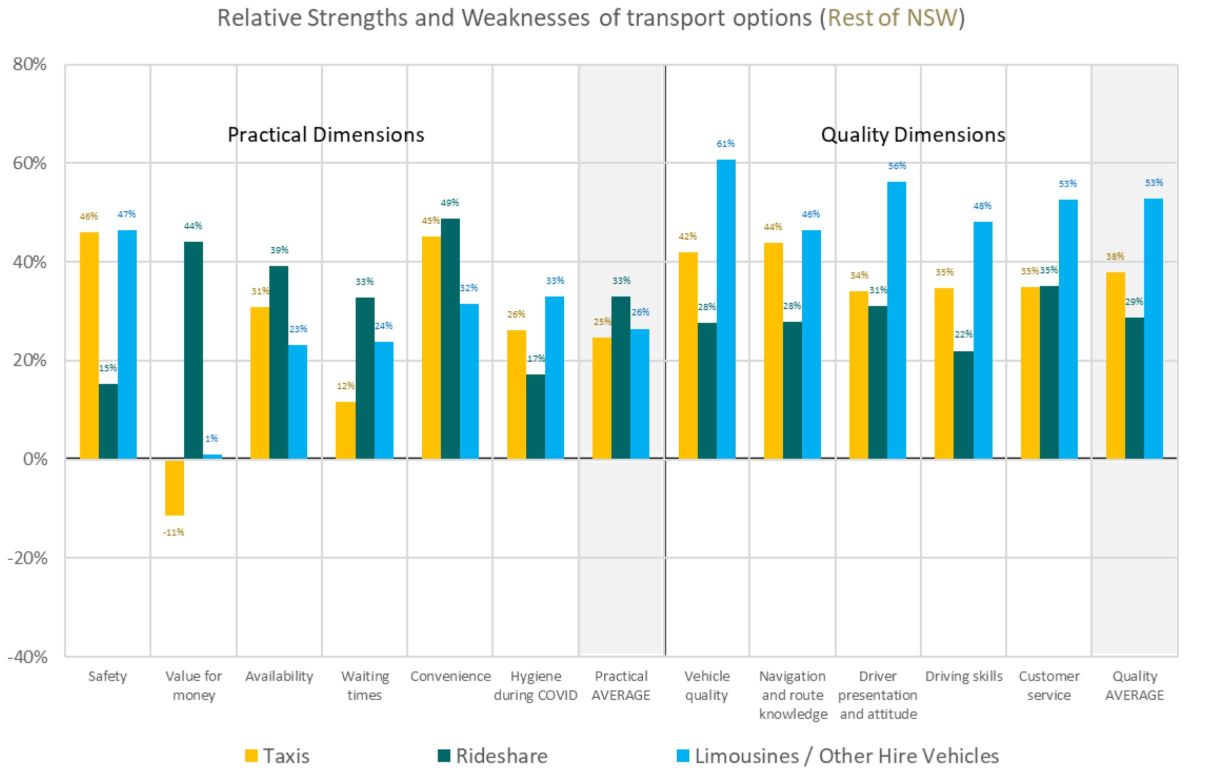
Base = Respondents aware of service in location [Taxis n=480; Rideshare n=400; Limo / Other n=373]

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

In the rest of NSW though, there is a somewhat different dynamic which has been 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 in 2020 is consistent with what has been observed in the previous surveys, and suggests that perceptions of the different transport services are still not substantially or 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=378; Rideshare n=191; Limo / Other n=203]

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.

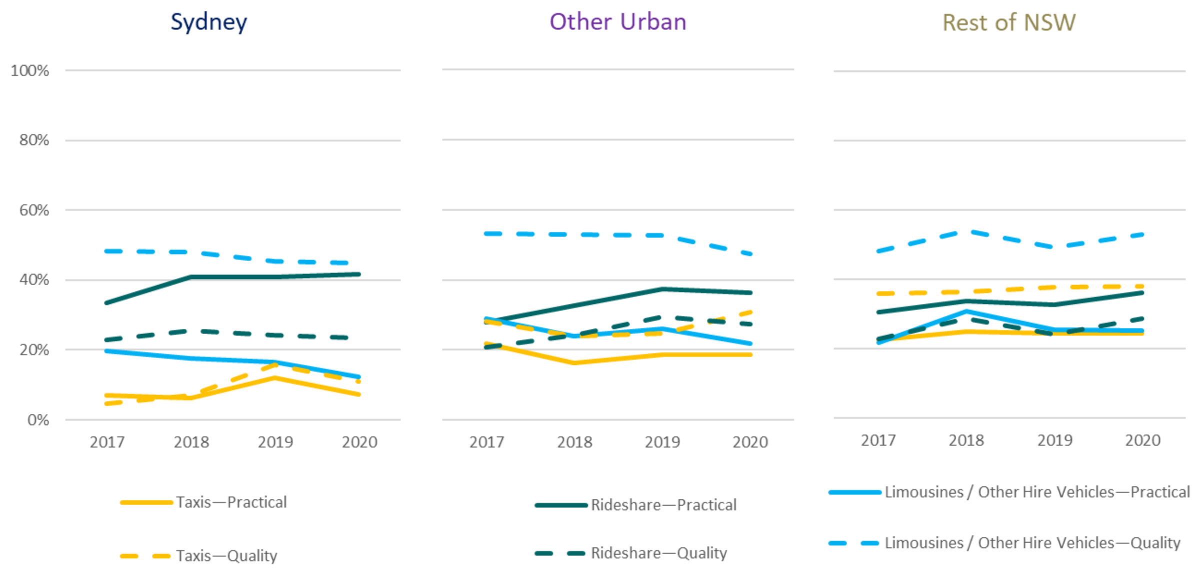
The macro patterns in these charts are:

- Rideshare consistently scores highest for practical dimensions, and higher than on quality dimensions.
- Limousines and other hire vehicles score highest on the quality dimensions, but still higher than taxis on the practical dimensions.
- Other than in Sydney where the two are equally low, taxis tend to score higher on quality than on practical dimensions, but are generally lowest on both.

Perceptions of taxis are lower across both practical and quality dimensions in 2020 in Sydney, but quality dimensions rose slightly in the Other Urban and rest of NSW areas.

Perceptions of rideshare were fairly stable in 2020, and perceptions of limousines and other hire vehicles fell slightly in all regions.

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



Preferences

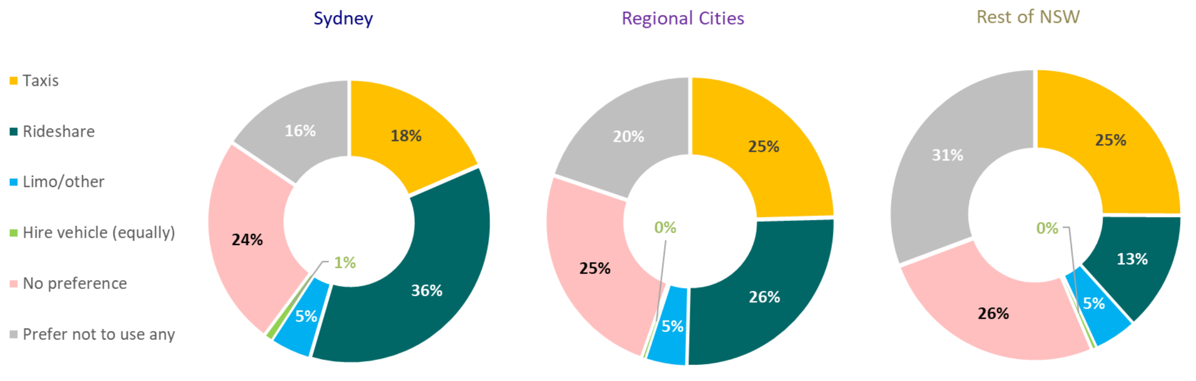
Preferred forms of transport do vary substantially across locations, and this continues to evolve. It is now only in the Rest of NSW that preferences for taxis remain more widespread than for rideshare.

- In Sydney, substantially more respondents have a preference for some form of hire vehicle (41%, which is mostly rideshare at 36%, +1% on 2019) than for taxis (18%, -7% from 2019). This gap has grown from 6% in 2017 to the 18% figure seen in 2020. Preferences for rideshare has grown from 25% to 36% in that time.

- In Other Urban areas the proportion preferring taxis has held fairly stable (25%, only -2% compared to 2017), but the proportion with a preference for hire vehicles increased from 18% in 2017 to 31% in 2019 and 2020. Again this change is primarily rideshare, which has gone from 9% to 26%. In 2017 there was +9% preference for taxis compared to hire vehicles, but this is now a -6% differential, and taxis and rideshare are effectively equally preferred.

- In the rest of NSW there remains a strong preference for taxis, though even here this fell from 33% preferring taxis in 2019 to 25% in 2020. The differential between taxis and hire vehicles generally fell from +17% to +7%, and from +19% to +12% when compared to rideshare specifically.

Figure 28: Preferences for transport options Q65/66



Base = all respondents [Sydney n=2,026; Other Urban n=508; Rest of NSW n=407]

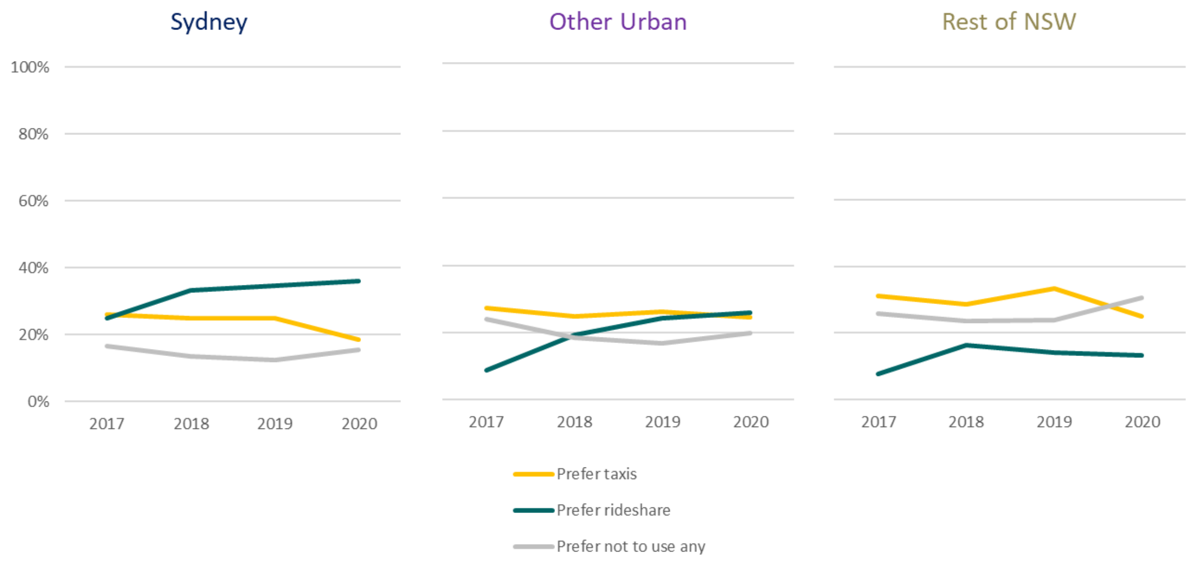
Preferred form of point-to-point transport	**Sydney**	**Other Urban**	**Rest of NSW**
Sample size	*2095*	*522*	*446*
Taxis	**18%**	**25%**	**25%**
Rideshare	36%	26%	13%
Limousine / Other hire vehicle	5%	5%	5%
Hire Vehicle (equally)	1%	0%	0%
Any form of Hire Vehicle	**42%**	**31%**	**18%**
No preference	24%	25%	26%
Prefer not to use any	16%	20%	31%

Consistent with other trends in awareness and usage in the survey, the tracking charts here show preferences for rideshare increasing in Sydney and Other Urban areas over time - but that the rate of change has not been as strong in the last two surveys.

Also consistent with other results in the 2020 survey, there appears to have been a more negative response to taxis during the year compared to rideshare.

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, 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. In all locations that line bounced back up somewhat in 2020, and it will be interesting to watch this result in 2021 as the impact of COVID (hopefully) wanes.

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

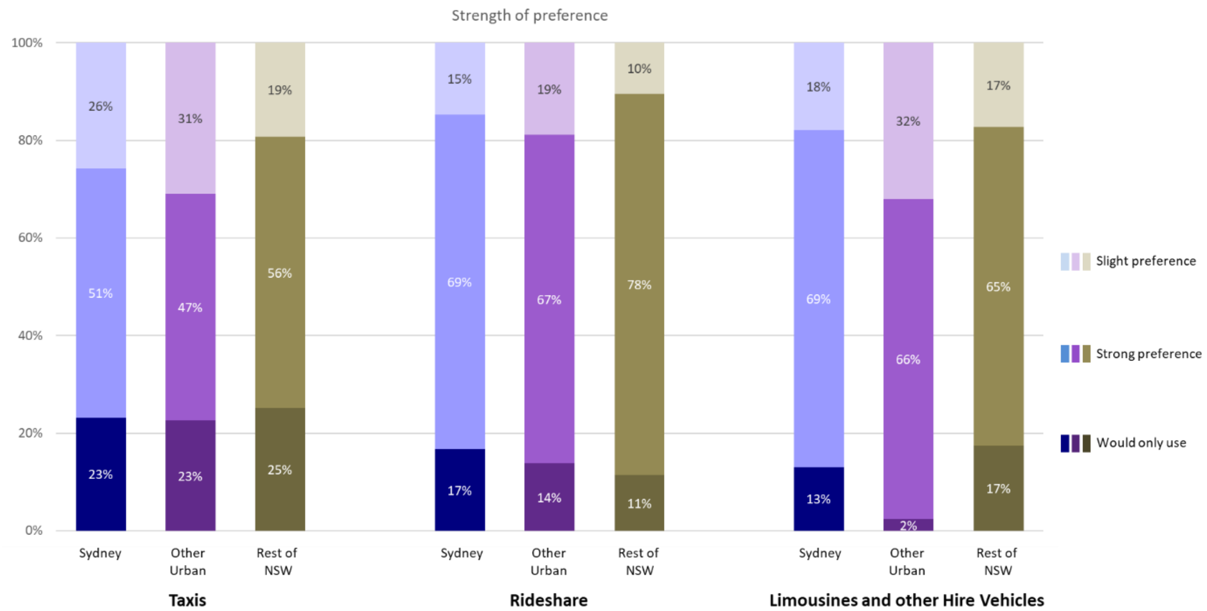


Strength of preference

There are generally slightly different patterns seen in the strength of preferences for taxis and rideshare, and these continue to be apparent within the groups who have different preferences, even as the size of those groups changes. Those people who maintain a preference for taxis are somewhat more likely to say they *would only use their preferred type of transport* (23%-25%) compared to those with a preference for rideshare (11%-17%). However, those with a preference for taxis are also a little more likely to say it is only a *slight preference* (19%-31% compared to 10%-19% for rideshare).

Those with a preference for rideshare are most likely to characterise it as a *strong preference* (67%-78%) by comparison to those with a preference for taxis (47%-56%).

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=117-735; Other Urban n=34-139; Rest of NSW n=23-115]
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, with responses very stable across all waves of the survey.

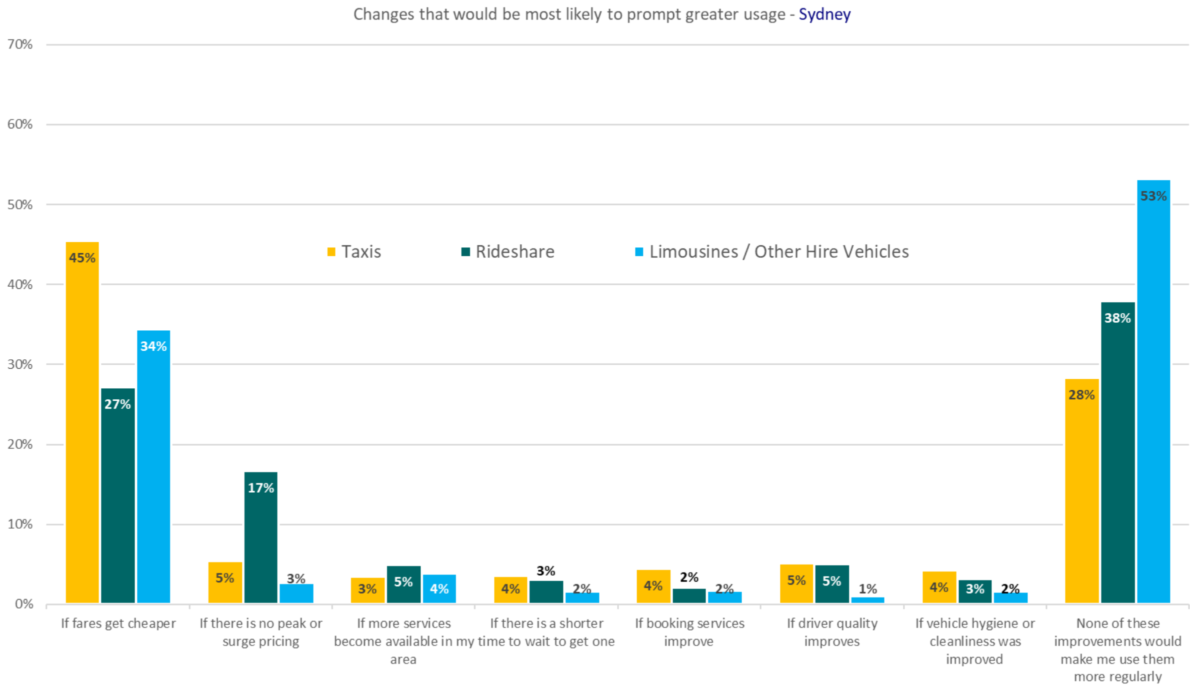
28%-49% of respondents across the different regions in 2020 said that nothing would get them to use taxis more often, with the equivalent figures for rideshare being 10%-11% higher, and higher again for limousines and other hire vehicles. For each type of service, willingness to consider increasing usage remains highest in Sydney and lowest in the Rest of NSW.

Given the stability, factors relating to cost remain 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.

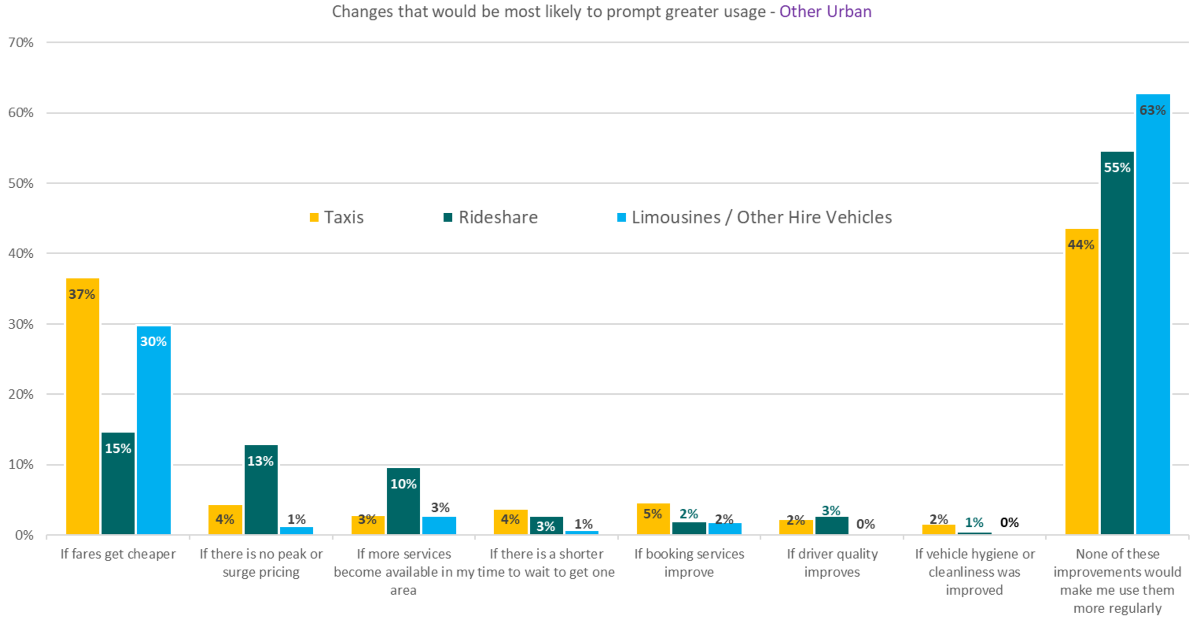
Availability of rideshare services remains a barrier in Other Urban areas and the Rest of NSW.

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



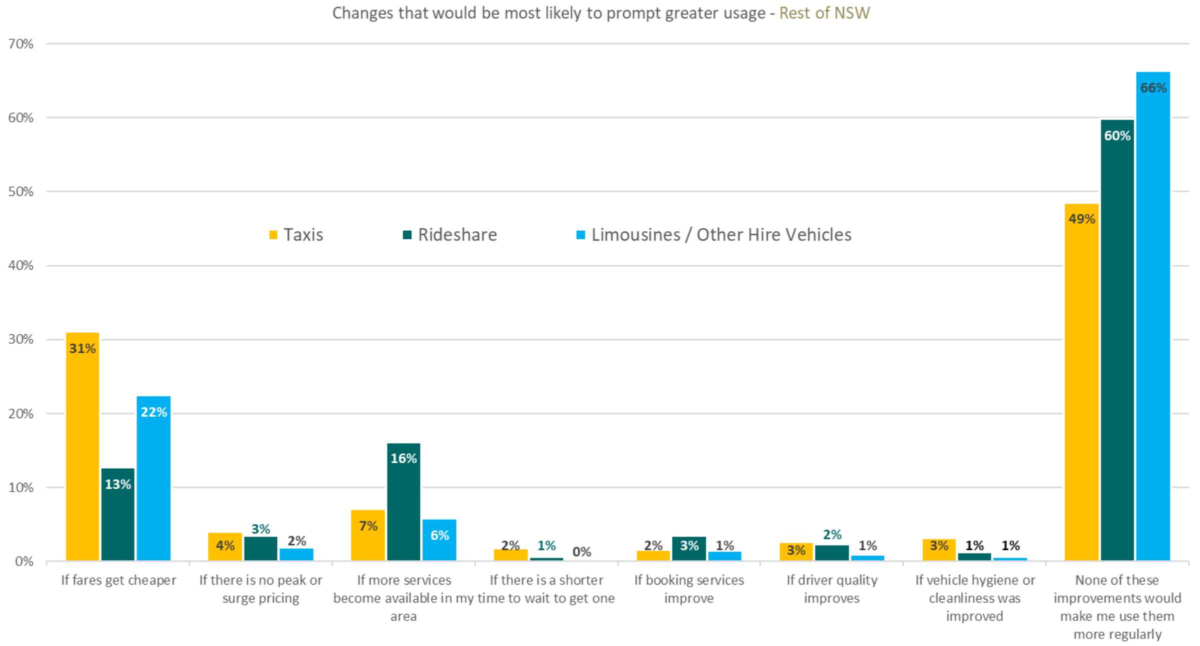
Base = All respondents [Sydney n=2,026]

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



Base = All respondents [Other Urban n=508]

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



Base = All respondents [Rest of NSW n=407]

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.

The large number of pink cells in the table show that perceptions of value in 2020 are generally considerably poorer than in 2019 for a number of services in some locations: taxis in Sydney; rideshare in Other Urban areas; and all types of transport in the rest of NSW.

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			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	*1962*	*480*	*378*	*1909*	*400*	*191*	*1589*	*373*	*203*
Overall	**Good + OK**	**44%**	**50%**	**47%**	**72%**	**55%**	**47%**	**33%**	**40%**	**31%**
	Poor	43%	25%	29%	7%	5%	8%	17%	10%	19%
	Differential	*1%*	*26%*	*18%*	*65%*	*50%*	*38%*	*16%*	*29%*	*12%*
During the day, and before 10pm	**Good + OK**	**44%**	**48%**	**48%**	**68%**	**52%**	**45%**	**31%**	**36%**	**28%**
	Poor	36%	20%	24%	7%	5%	7%	16%	10%	17%
	Differential	*8%*	*28%*	*24%*	*61%*	*47%*	*37%*	*15%*	*26%*	*10%*
After 10pm - Sunday to Thursday	**Good + OK**	**32%**	**31%**	**29%**	**57%**	**41%**	**37%**	**27%**	**29%**	**24%**
	Poor	40%	25%	30%	12%	9%	11%	16%	11%	18%
	Differential	*-9%*	*6%*	*0%*	*45%*	*32%*	*26%*	*11%*	*18%*	*6%*
After 10pm - Friday and Saturday	**Good + OK**	**30%**	**30%**	**29%**	**52%**	**37%**	**32%**	**26%**	**29%**	**22%**
	Poor	43%	27%	32%	17%	14%	15%	17%	11%	19%
	Differential	*-13%*	*3%*	*-3%*	*36%*	*23%*	*17%*	*9%*	*18%*	*3%*
For short trips (under 5km)	**Good + OK**	**47%**	**46%**	**49%**	**68%**	**48%**	**47%**	**25%**	**22%**	**24%**
	Poor	38%	25%	26%	10%	6%	9%	21%	15%	21%
	Differential	*9%*	*22%*	*22%*	*57%*	*42%*	*38%*	*3%*	*7%*	*2%*
For short trips (under 5km)	**Good + OK**	**47%**	**46%**	**49%**	**68%**	**48%**	**47%**	**25%**	**22%**	**24%**
	Poor	38%	25%	26%	10%	6%	9%	21%	15%	21%
	Differential	*9%*	*22%*	*22%*	*57%*	*42%*	*38%*	*3%*	*7%*	*2%*

* 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 2020 compared to 2019. Cells highlighted pink are >5% less positive in 2020.

In Sydney

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

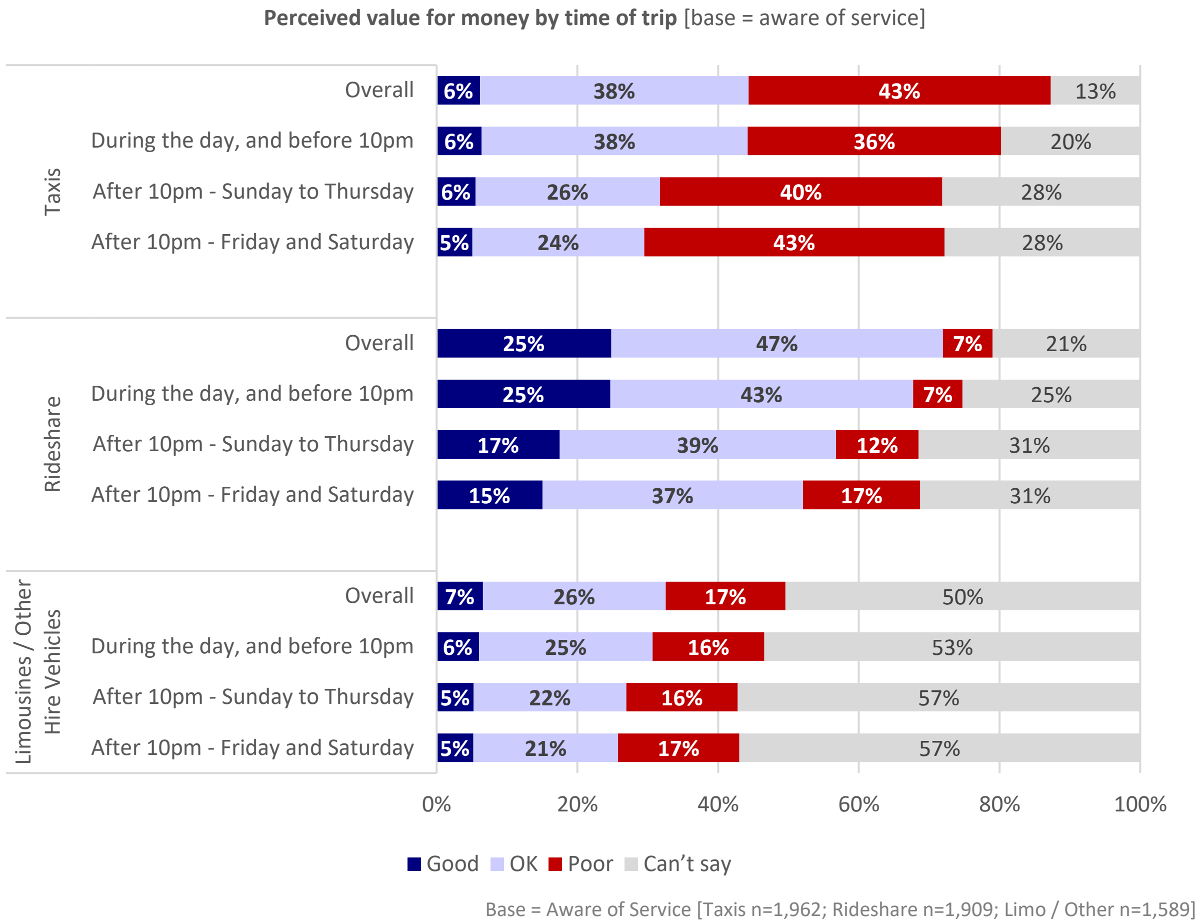
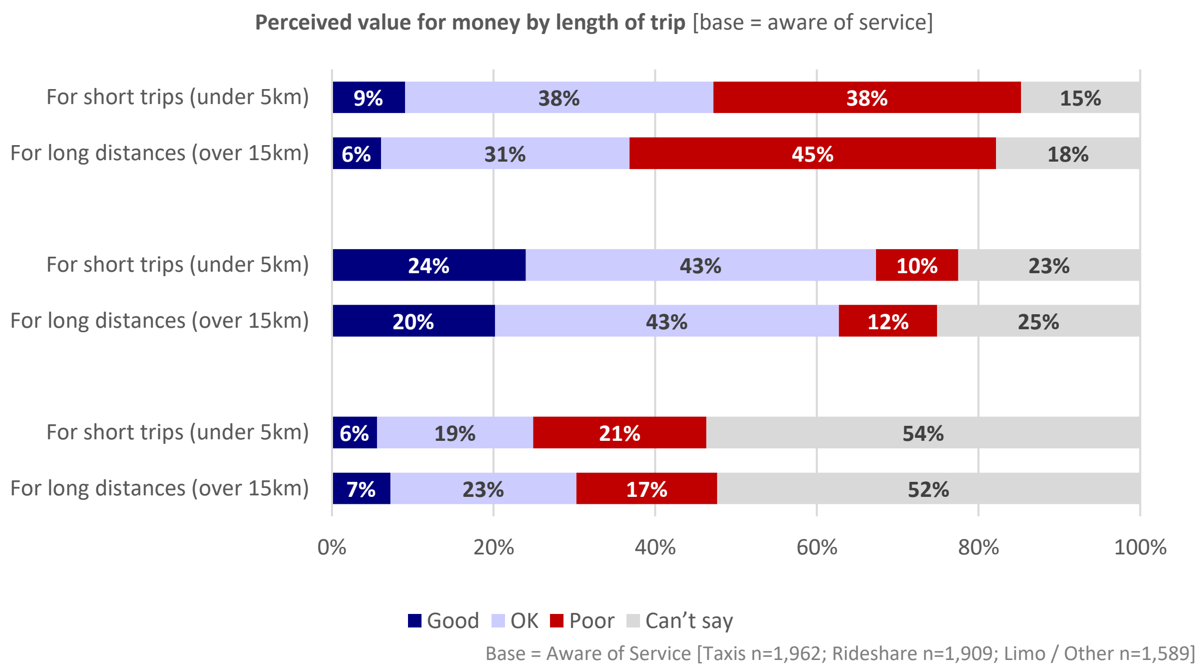


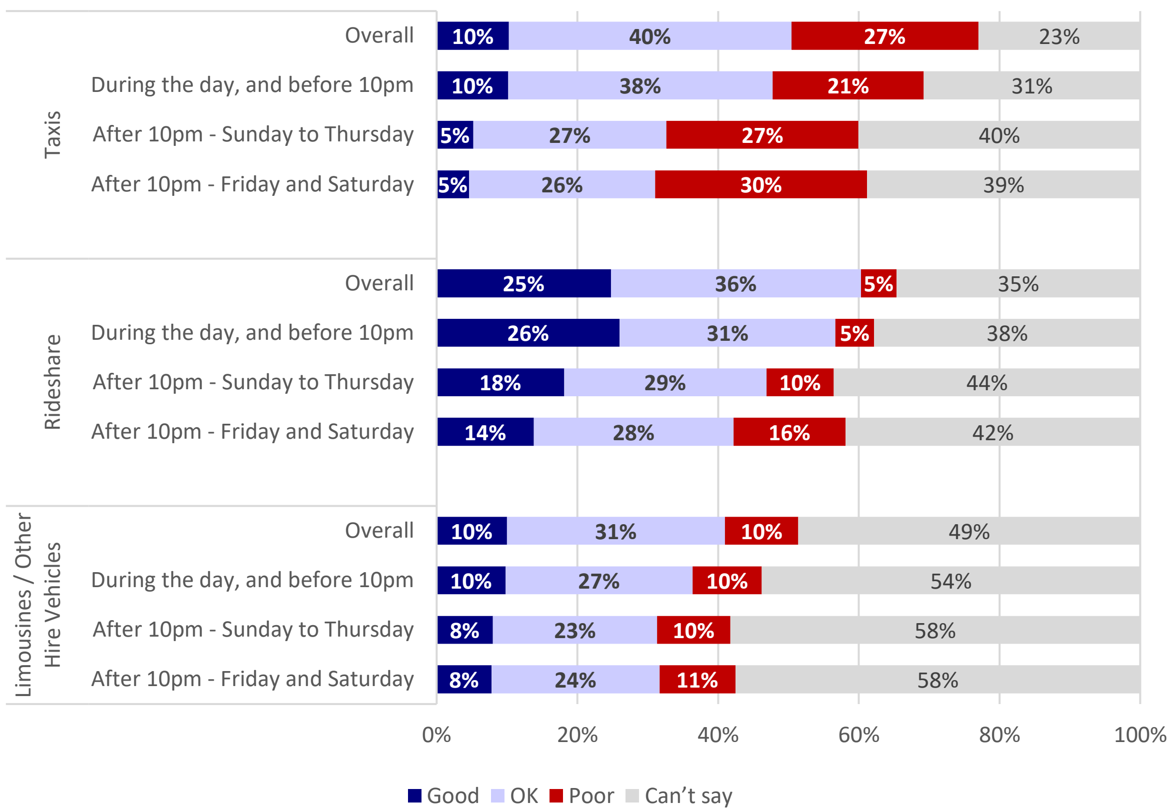
Figure 36: Perceptions of value for money by length of trip amongst those aware of the service in their region (Sydney) Q21



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]

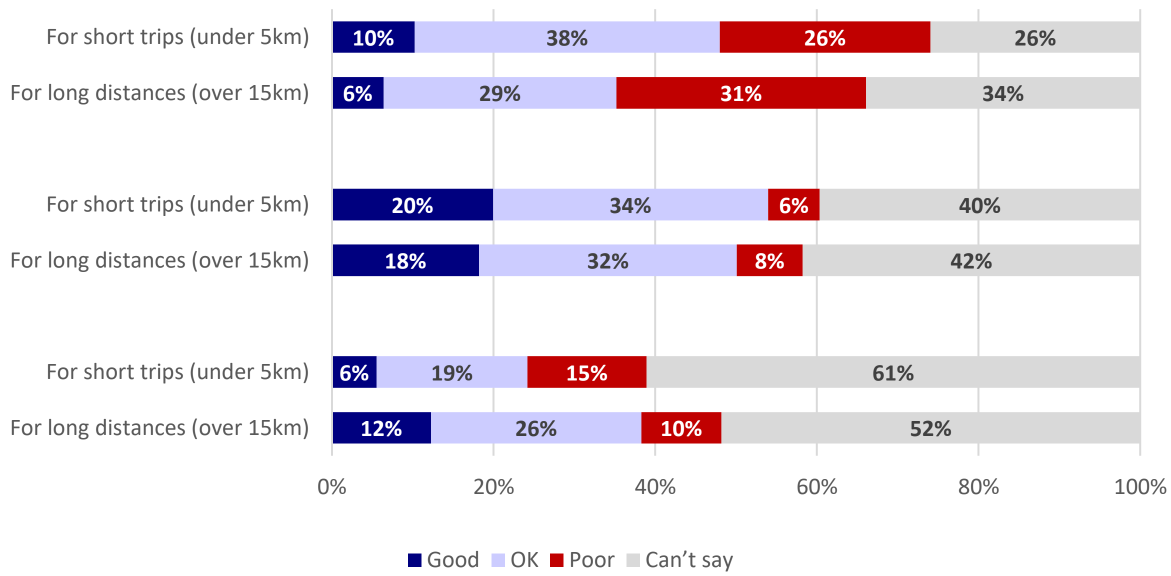
Perceived value for money by time of trip [base = aware of service]



Base = Aware of Service [Taxis n=480; Rideshare n=400; Limo / Other n=373]

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

Perceived value for money by length of trip [base = aware of service]



Base = Aware of Service [Taxis n=480; Rideshare n=400; Limo / Other n=373]

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

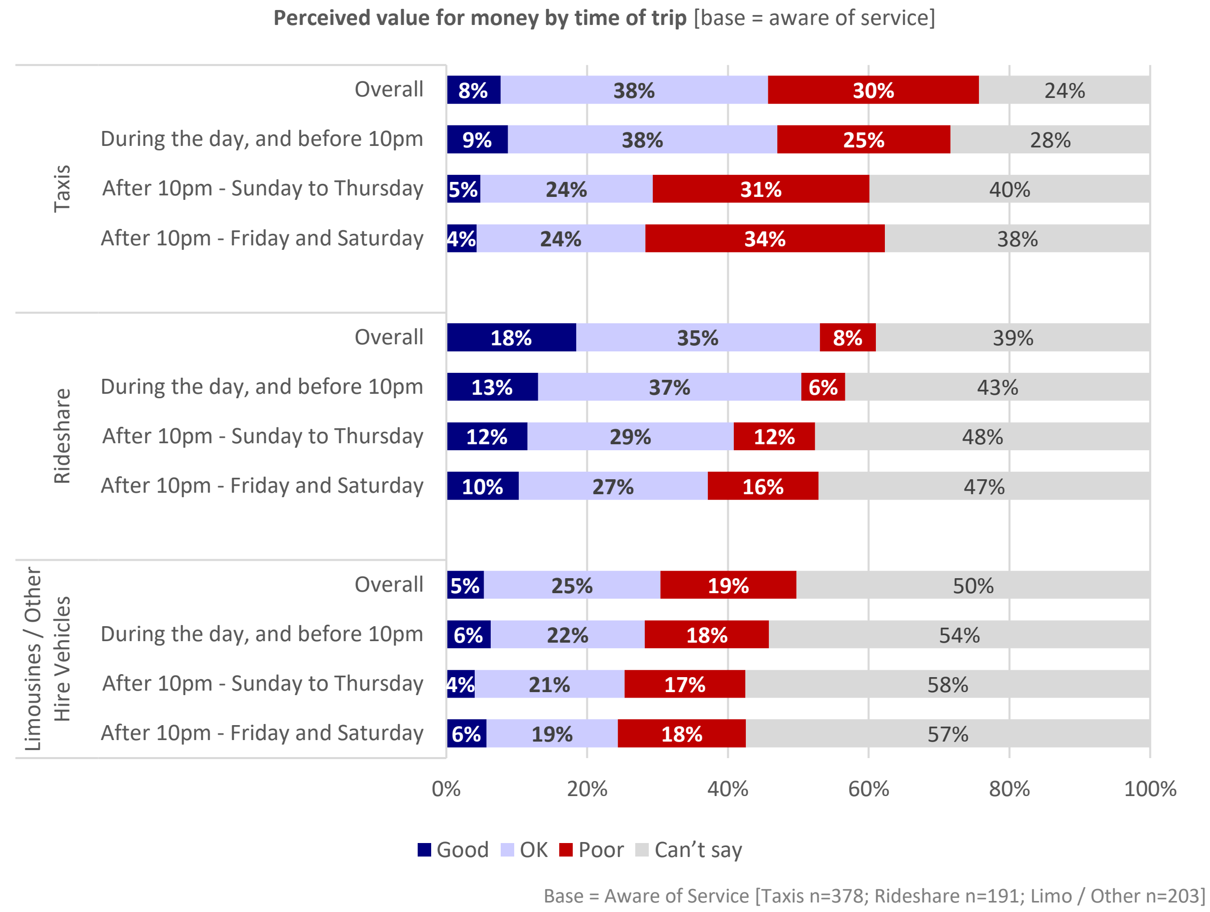
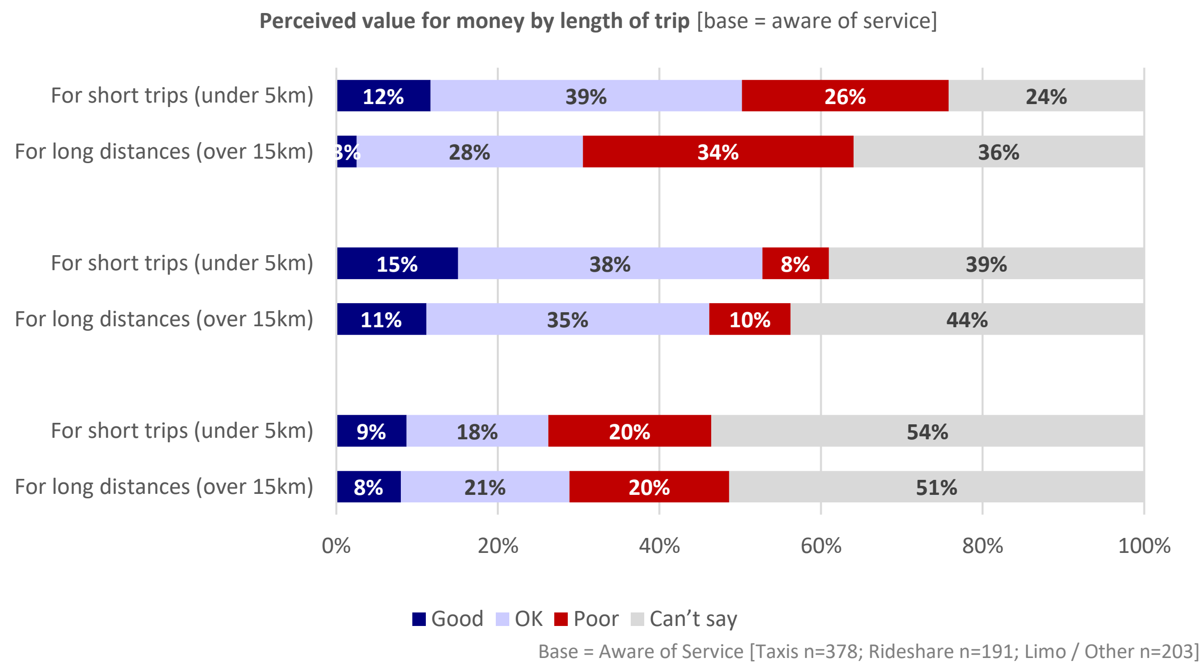


Figure 40: Perceptions of value for money by length of trip amongst those aware of the service in their region (Rest of NSW) Q21

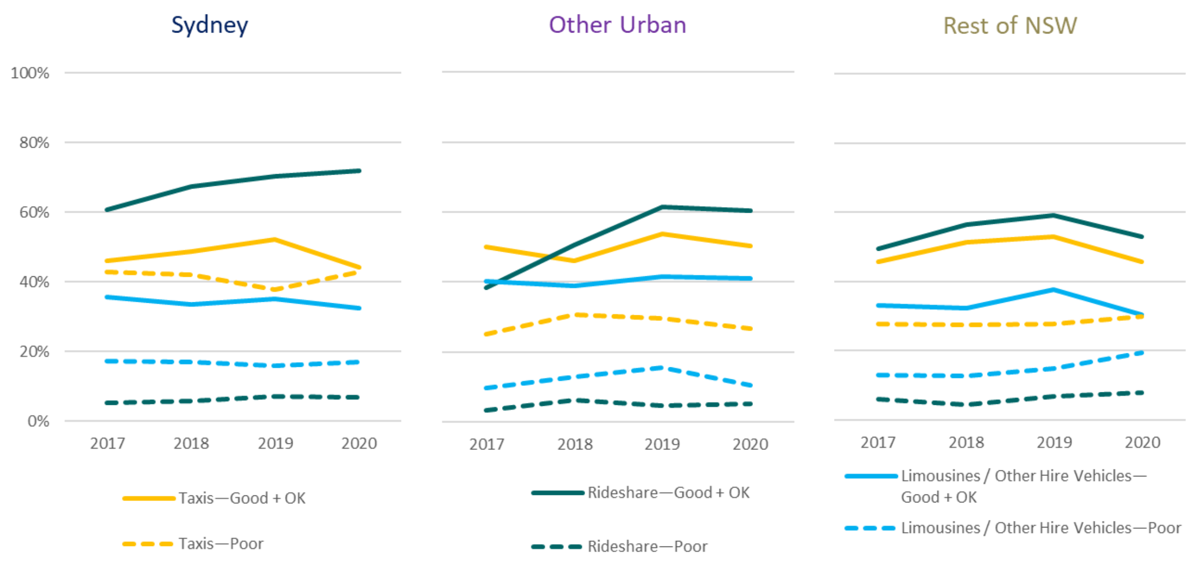


The tracking chart shows change in perceptions of overall value over time. This clearly shows the upwards perceptions of value associated with rideshare from 2017 to 2019 in the slope of the three solid dark green lines. This has been most apparent in the other urban areas, where awareness and use also climbed the most steeply in that time. In 2020 the perceived value of rideshare flattened off and even fell in the rest of NSW region.

Perceived value of taxis also tended to increase slightly from 2017-2019, though not to the same extent. In 2020 the perceived value of taxis fell in all locations.

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 much 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

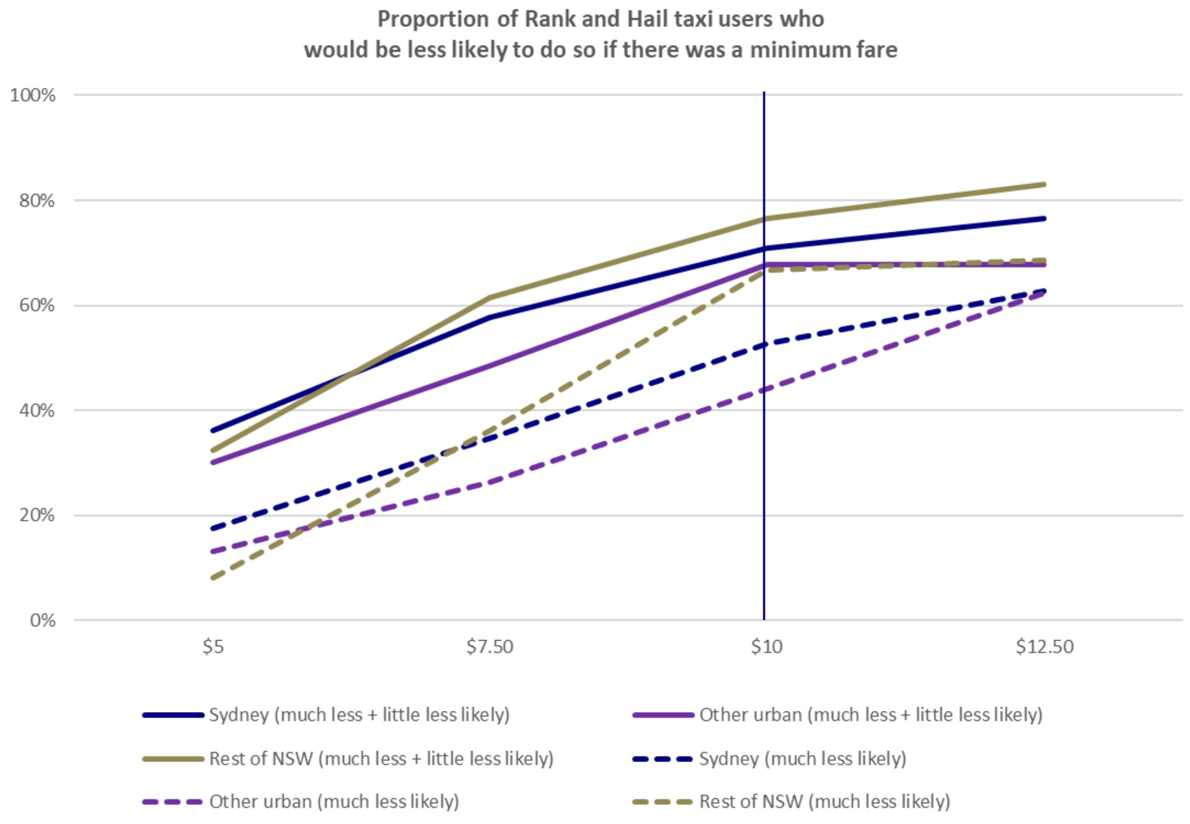


Impact of Minimum Rank & Hail Fares

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 slightly different across the three areas in 2020 though, with the rest of NSW region the most sensitive and Other Urban areas the least sensitive. Likely decline in use of rank and hail taxis peaks at around 70-80% of users saying they would feel less likely to use them 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=385; Other Urban n=57; Rest of NSW n=30]

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 2017-2020 surveys, though magnitudes have changed.

- In Sydney all four methods of obtaining taxis are still approximately equally prevalent, but outside of Sydney hailing taxis in the street is uncommon. ASAP bookings are more common outside of Sydney.
- Rideshare services are most commonly obtained by ASAP bookings. The ratio of ASAP to pre-booked rideshare services is usually much the same amongst users across the three regions, but if anything slightly higher in Sydney and lower in the rest of NSW in 2020. 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

Base = all respondents [Sydney n=2,026; Other Urban n=508; Rest of NSW n=407]

% of population		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	8%	6%	7%
	ASAP booked	13%	15%	16%
	Rank	11%	11%	7%
	Hail	13%	2%	1%
Rideshare	Pre-booked	14%	9%	7%
	ASAP booked	**36%**	18%	8%
Limousines and other hire vehicles	Pre-booked	4%	3%	3%
	ASAP booked	1%	1%	1%

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

Base = Used transport type within the last 6 months [Sydney n=104-888; Other Urban n=21-108; Rest of NSW n=9-79]

% of users (last 6 months)		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	28%	27%	35%
	ASAP booked	41%	64%	77%
	Rank	37%	47%	33%
	Hail	43%	8%	6%
Rideshare	Pre-booked	33%	38%	57%
	ASAP booked	81%	77%	69%
Limousines and other hire vehicles	Pre-booked	83%	78%	77%
	ASAP booked	19%	27%	23%

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 from 2017-2019 was the increase in rideshare penetration. In 2020 all methods of obtaining all forms of point-to-point transport are sharply lower, reflecting the lower overall level of usage.

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

Waiting Times

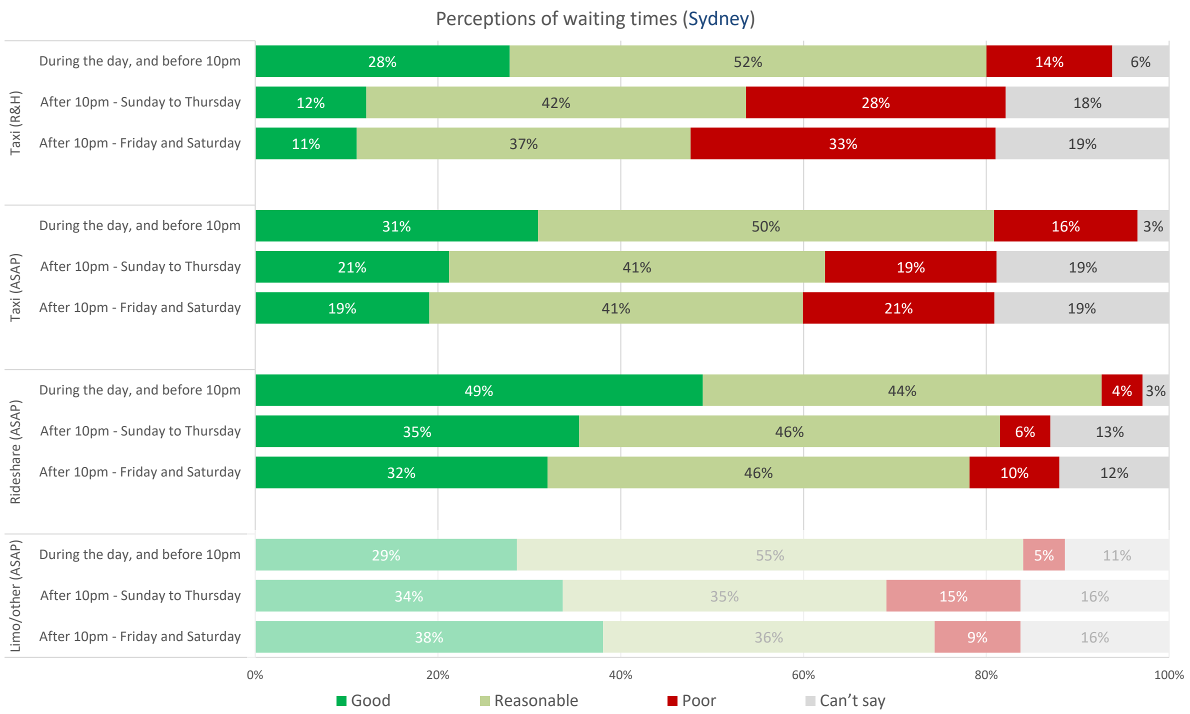
As might be expected, perceived waiting times are typically somewhat poorer in peak periods after 10pm, across all transport types and locations.

Usually there is little difference in perceptions of waiting times after 10pm on Sunday-Thursday or on Friday-Saturday. In 2020 though, other than for rank and hail taxis, respondents perceived that waiting times were worse again on Friday and Saturdays than during off-peak periods, especially outside of Sydney.

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

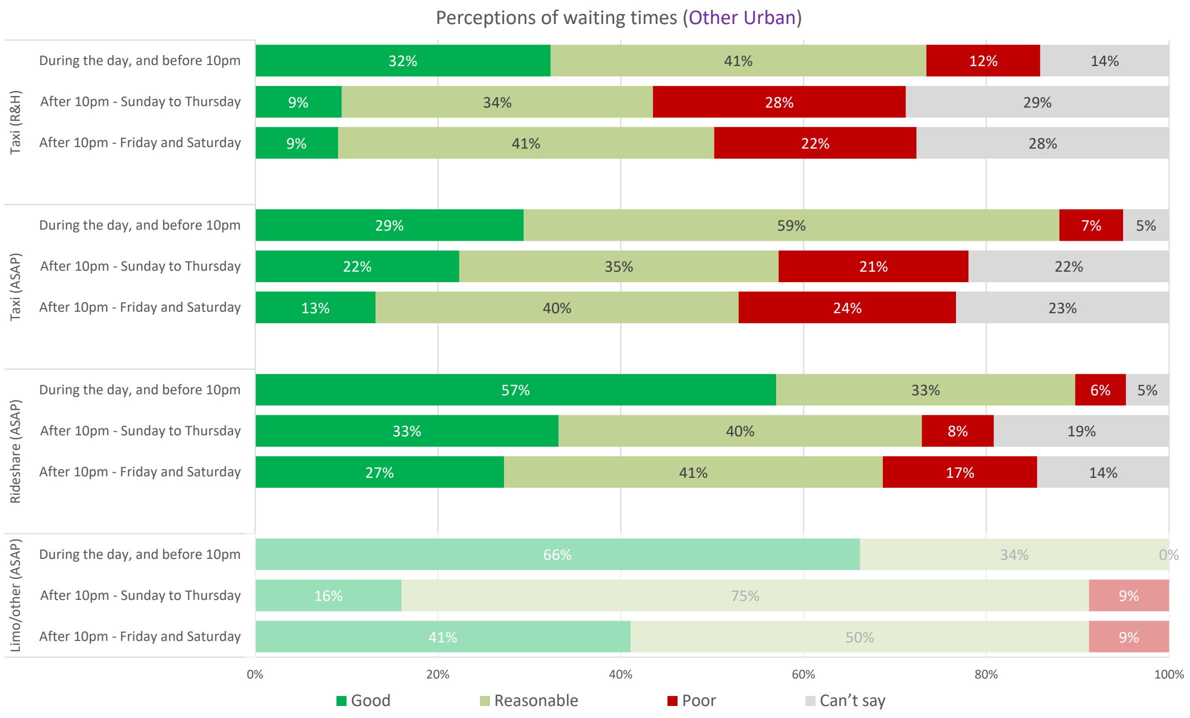
- Rideshare waiting times continue to be viewed more favourably than taxi waiting times.
- There is little perceived distinction between rank and hail taxi waiting times and ASAP booking waiting times.
- Perceptions of waiting times are more similar than dissimilar across locations.

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



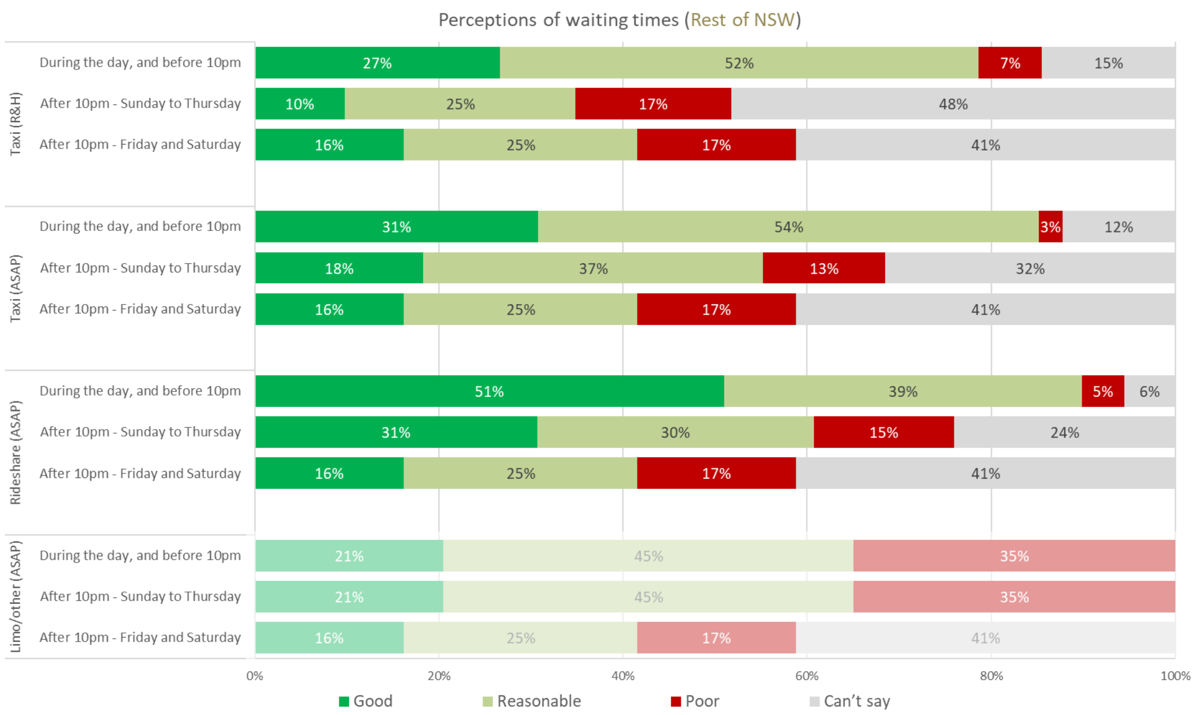
Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=385; Taxi ASAP n=254; Rideshare ASAP n=726; Limo / Other ASAP n=20]

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=57; Taxi ASAP n=67; Rideshare ASAP n=75; Limo / Other ASAP n=5*]

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

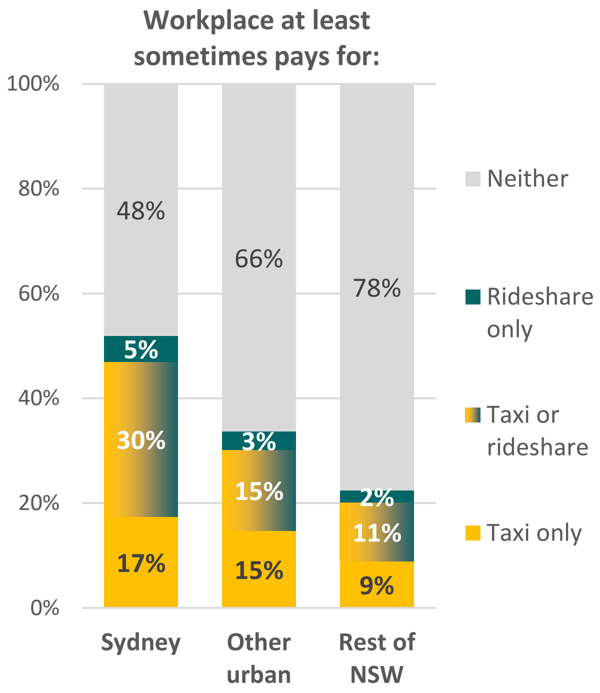


Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=30; Taxi ASAP n=60; Rideshare ASAP n=22; Limo / Other ASAP n=3*]

* 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



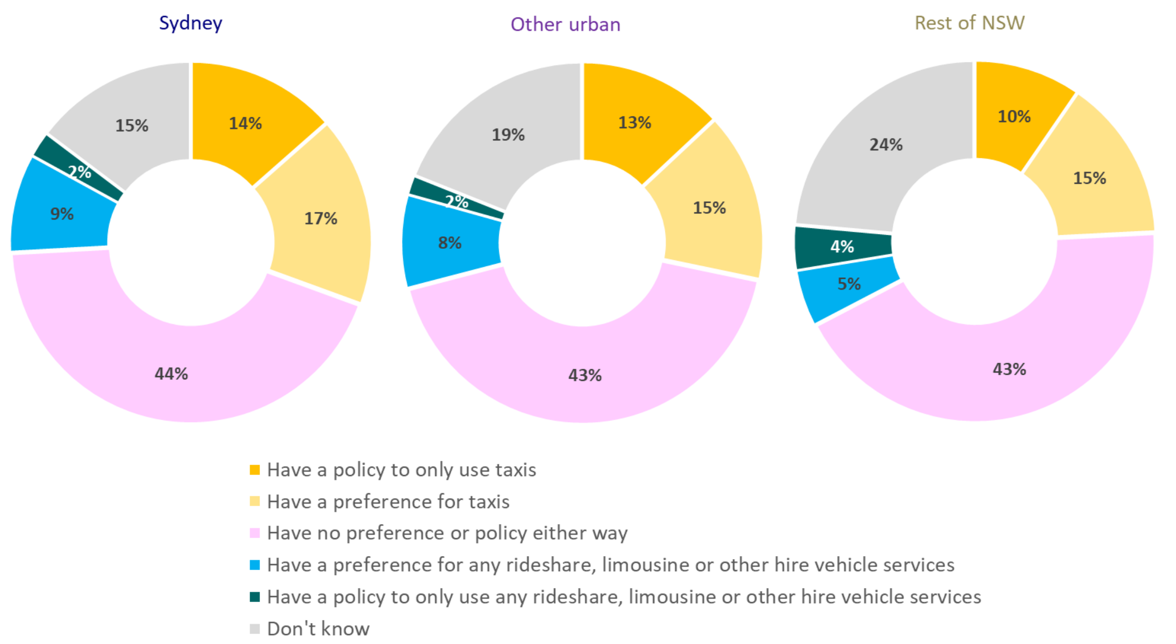
Just over half of all employed Sydney respondents (52%) said that their employer at least sometimes pays for employees to use point-to-point transport (this figure has been between 49% and 54% for the past three surveys). The proportions were considerably lower in the other locations, with the lowest recorded in the rest of NSW (22%).

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 2%-5%). Much larger proportions paid for taxis only (9%-17% - slightly lower than the 11%-20% in 2019 in all locations).

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. The rest of NSW result does fluctuate in the annual reporting, but this variation is likely more due to the small sample sizes involved, as there is not a clear year-on-year pattern in these variations.

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



Base = Workplace at least sometimes pays for transport [Sydney n=713; Other Urban n=83; Rest of NSW n=36]

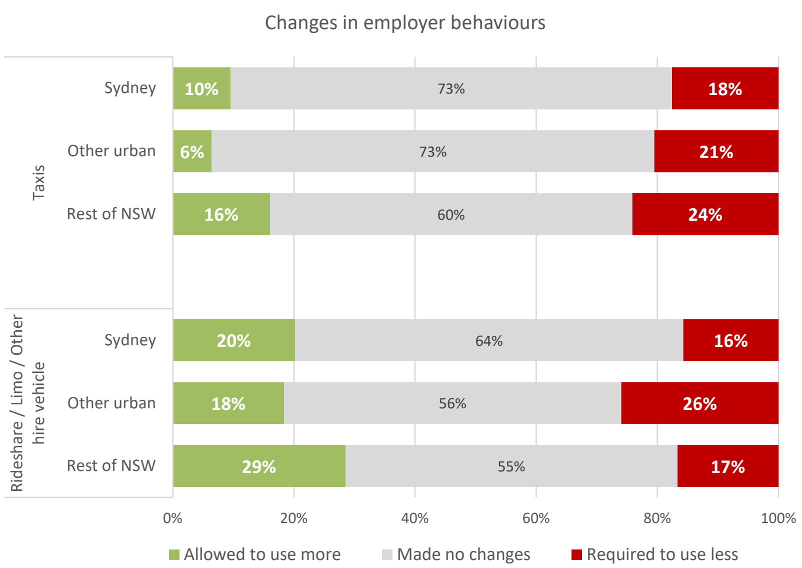
Change in employer behaviours

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, 18% 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, and 10% allowed taxi use to increase (nett differential = -8%), and this nett decline has been seen in all of the last 4 years. The equivalent figure for hire vehicles was +4% in 2020, but in the 2017-2019 period the nett differential here was +15%-+23%, showing that employees perceive their employers to be generally increasing willingness to at least sometimes pay for 'hire vehicles'.

Outside of Sydney, perceptions of work-related use of taxis has been quite static, but large positive differentials were seen for rideshare. In 2020, similar to Sydney, taxi use fell to a negative differential, while hire vehicles were lower than the strong growth differentials of previous years.

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



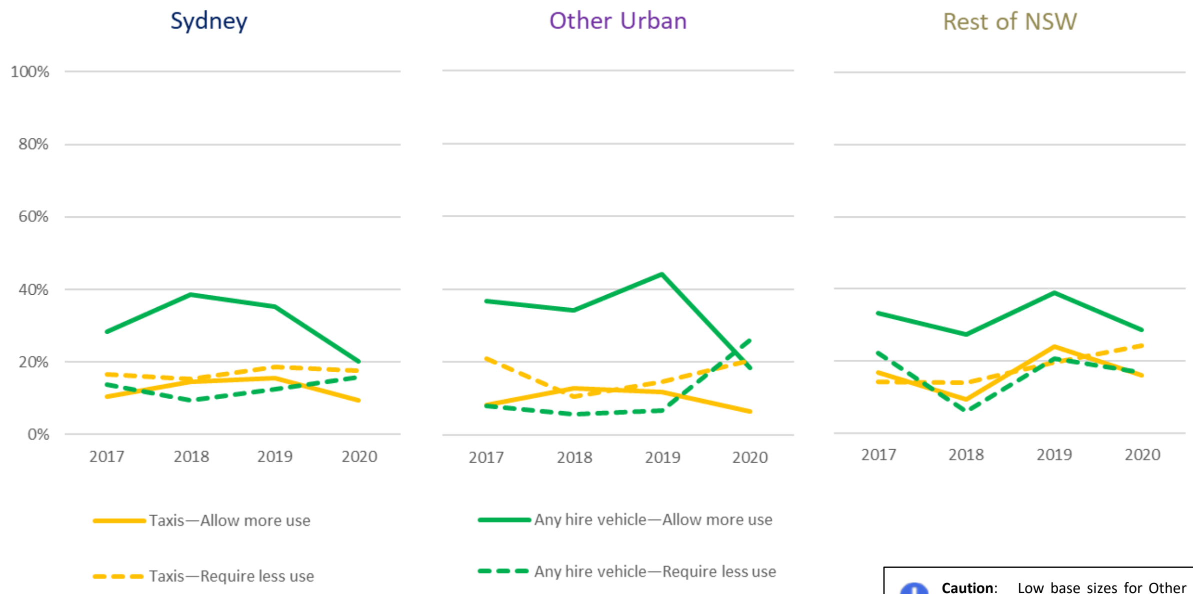
2020	2019	2018	2017
-8%	-3%	-1%	-6%
-14%	-3%	+2%	-13%
-8%	+4%	-5%	+2%
+4%	+23%	+29%	+15%
-8%	+38%	+29%	+29%
+12%	+18%	+21%	+11%

Base = Workplace at least sometimes pays for that transport [Sydney n=476-645; Other Urban n=46-75; Rest of NSW n=19-32]

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 – and that this shift is continuing in 2020.

[2] For simplicity, this question refers to "any rideshare, limousine or other hire vehicle" rather than differentiating.

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



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

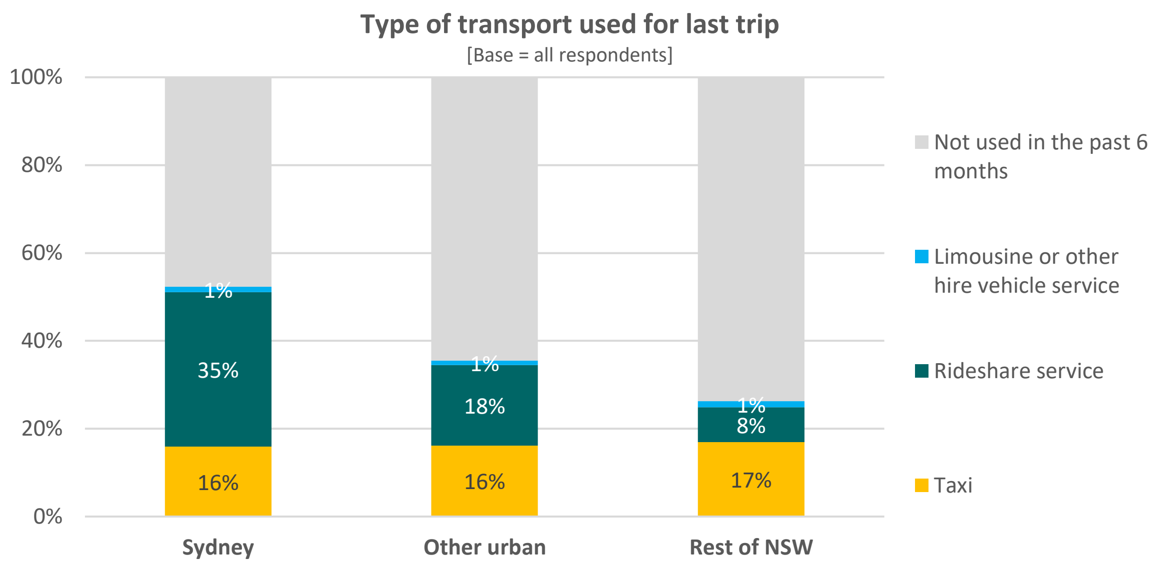
F. Last-Trip Details

Type of point-to-point transport

52% of Sydney respondents had used point-to-point transport in the last 6 months (down from 68% in 2019), along with 35% in other urban areas (down from 51%) and 26% in the rest of NSW (down from 40%).

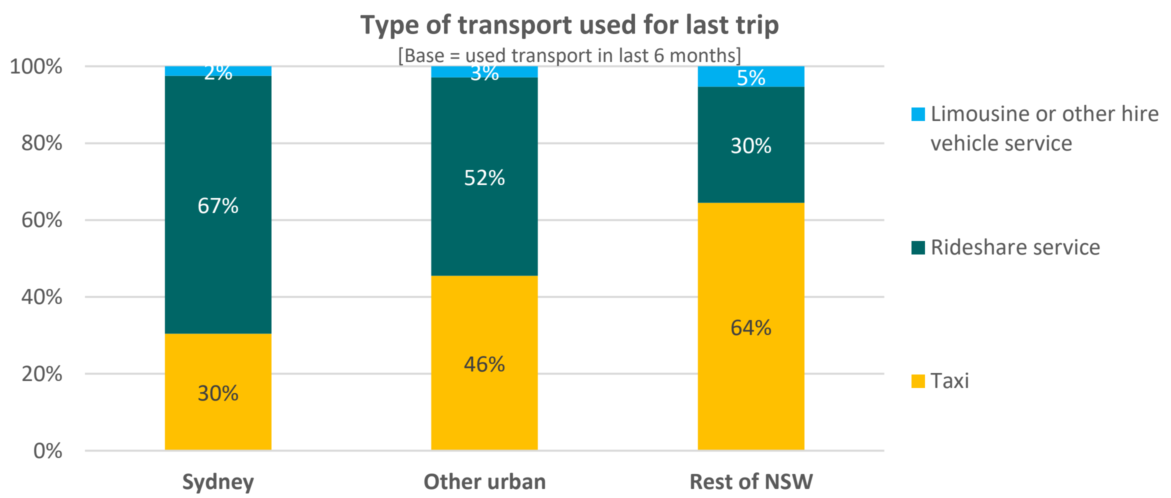
Similar to the 2018 and 2019 surveys, even in this period of depressed use, the usage of rideshare services has held steady and exceeded the usage of taxis in Sydney. In Other Urban areas, the change in demand has been less sharp, and both services were used to a similar extent. In the rest of NSW taxis are still the predominant transport service being used, although use of taxis fell proportionally more than rideshare. The following tracking chart highlights the increasing demand of rideshare services in Sydney and in Other Urban areas, and its continued proportional growth.

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



Base = all respondents [Sydney n=2,026; Other Urban n=508; Rest of NSW n=407]

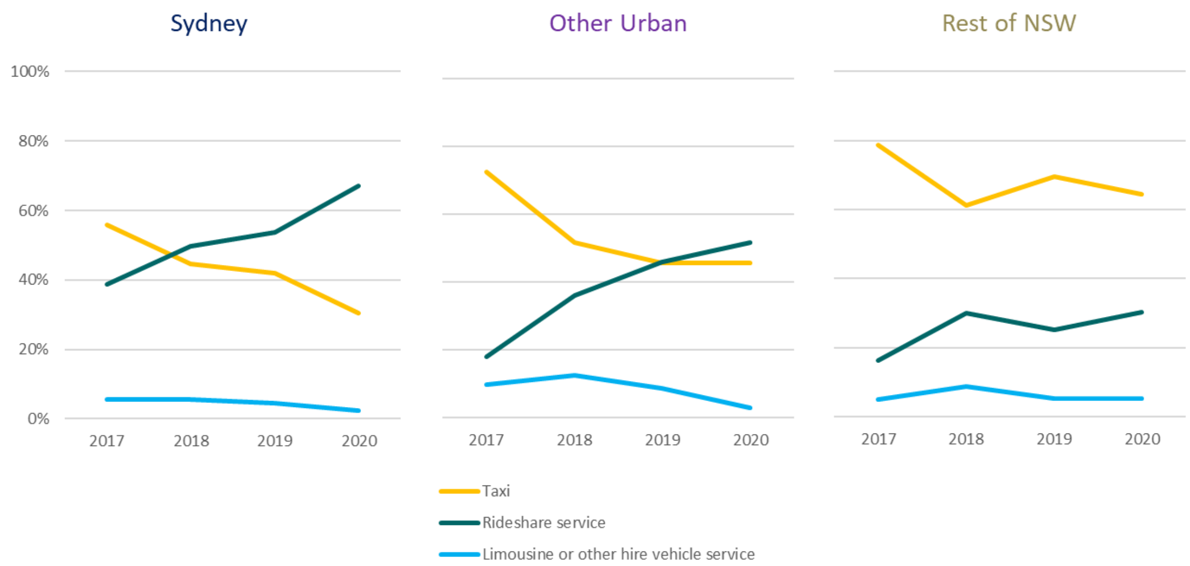
Figure 54: Usage of vehicle types for last trip (base = used transport in last 6 months) QX



Base = Used transport in the last 6 months [Sydney n=1,066; Other Urban n=164; Rest of NSW n=95]

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, and how in 2020 this proportionality has changed even within the lower overall volume of use.

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



Pooled Rideshare

Pooled rideshare services involve multiple customers making a similar trip sharing the costs. Over one-in-ten respondents whose last trip was a rideshare in Sydney or other urban areas reported that a pooled rideshare service was used (11% and 16% respectively). Surprisingly in 2020, over double the number of rideshare users in the rest of NSW reported their last rideshare to be pooled, when compared with 2019 (42%, compared to 17% in 2019)

***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

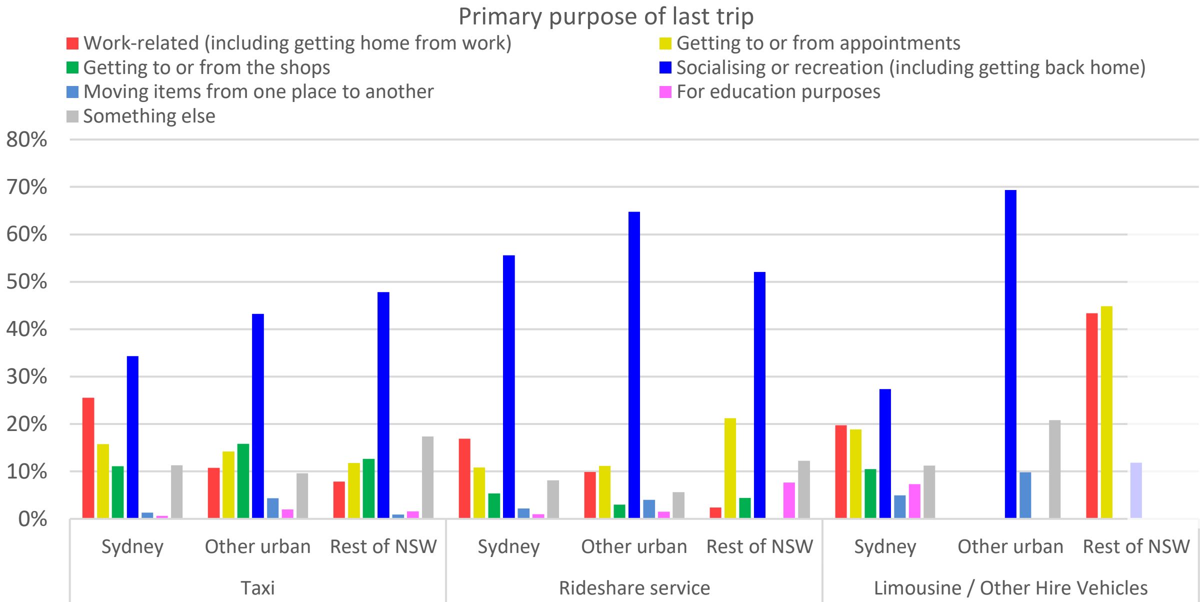
This section looks at details of respondents' last trip in any type of point-to-point transport. Sample sizes for hire vehicles outside of Sydney are very small, and results for groups with sample of less than 30 are generally shown in a greyed out form in all tables and charts, and should be interpreted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

Group	Sydney – Taxi	Sydney – Ridehare	Sydney – Limo / other HV	Other urban – Taxi	Other urban – Ridehare	Other urban – Limo / other HV	Rest of NSW – Taxi	Rest of NSW – Ridehare	Rest of NSW – Limo / other HV
2017 Sample	719	499	71	151	37	20*	126	26*	8*
2018 Sample	647	731	81	141	95	35	109	46	16*
2019 Sample	596	763	65	121	120	25*	121	41	9*
2020 Sample	325	715	26*	81	76	7*	69	22*	4*

Purpose

Despite the nature of 2020, and the lower volume of point-to-point transport usage, socialising remains the dominant purpose for point-to-point transport trips generally. This was especially the case for rideshare. Socialising is also the main purpose for taxis, but to a lesser extent in all areas. This pattern is very similar to that seen in 2018 and 2019.

Figure 56: Last trip – Primary purpose Q39



	Taxis			Rideshare			Limousines or other hire vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
	325	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Work-related (inc getting home from work)	**26%**	11%	8%	17%	10%	2%	20%	0%	**43%**
Getting to or from **appointments**	16%	14%	12%	11%	11%	21%	19%	0%	**45%**
Getting to or from the **shops**	11%	16%	13%	5%	3%	4%	10%	0%	0%
Socialising or recreation (inc getting back home)	**34%**	**43%**	**48%**	**56%**	**65%**	**52%**	**27%**	**69%**	12%
Moving items from one place to another	1%	4%	1%	2%	4%	0%	5%	10%	0%
For **education** purposes	1%	2%	2%	1%	2%	8%	7%	0%	0%
Something else	11%	10%	17%	8%	6%	12%	11%	21%	0%

Bold figures = Top 3 responses.
Note small base sizes in some cases.

Time

The majority of last trips reported on were during the day or before 10pm, consistent with previous surveys. Rideshare trips outside Sydney were somewhat more likely to be before 10pm in 2020.

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 pattern is consistent with previous years, suggesting that patterns of use of taxis and rideshare remained somewhat consistent with previous years, even in the conditions of 2020. This different distribution, alongside the different ways taxis and rideshare are obtained suggests that they are often used 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=26-715; Other Urban n=7*-81; Rest of NSW n=4*-69]

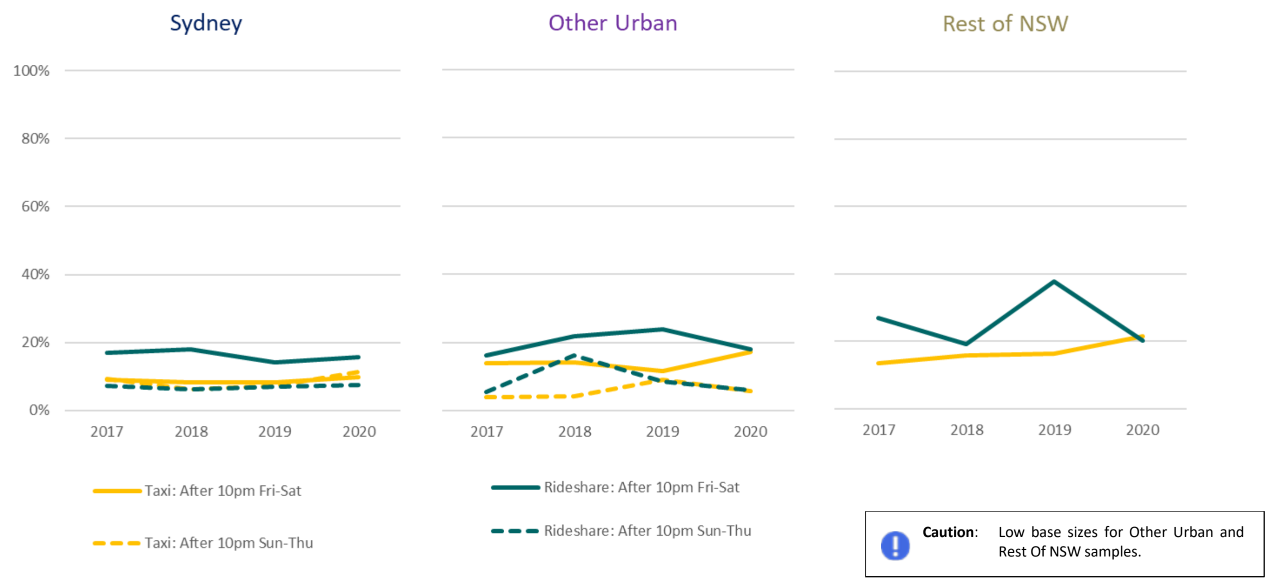
Caution: Low base sizes for Other Urban and Rest Of NSW samples.

***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 more clearly the consistently higher proportion of rideshare trips that are after 10pm on Friday or Saturday night.

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

The biggest difference in pick up and drop off locations in 2020 was the reduced prevalence of airport trips for taxis, and beyond this the pattern of locations is quite similar in 2020. Private homes remain the most commonly reported pick up point for a last trip. One interesting pattern in the data that is still apparent in 2020 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):	*325*	*325*	*715*	*715*	*26*	*26*
A private **home** or apartment	**32%**	**48%**	**53%**	**52%**	**65%**	**12%**
A **workplace** or office	**16%**	**14%**	**10%**	**10%**	0%	3%
A **shop** or shopping centre	6%	6%	3%	5%	7%	12%
A **pub, club** or other similar type of location	9%	8%	**10%**	**12%**	3%	8%
In a **CBD**, town centre or other busy area	**15%**	**6%**	8%	4%	4%	7%
At an **event**	3%	3%	4%	4%	**9%**	**15%**
At an **airport**	7%	5%	3%	6%	**12%**	**29%**
At a **train station** or other transport connection	8%	4%	5%	3%	0%	0%
Hospital or **medical** facility	3%	4%	2%	2%	0%	13%
Somewhere else	0%	3%	3%	2%	0%	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):	*81*	*81*	*76*	*76*	*7*	*7*
A private **home** or apartment	**38%**	**51%**	**55%**	**50%**	50%	11%
A **workplace** or office	**10%**	**8%**	4%	1%	0%	0%
A **shop** or shopping centre	**11%**	**10%**	**5%**	**5%**	0%	0%
A **pub, club** or other similar type of location	14%	5%	**20%**	**24%**	0%	0%
In a **CBD**, town centre or other busy area	8%	2%	3%	5%	39%	41%
At an **event**	0%	7%	3%	4%	0%	9%
At an **airport**	5%	2%	0%	4%	0%	10%
At a **train station** or other transport connection	9%	9%	4%	4%	0%	0%
Hospital or **medical** facility	4%	5%	2%	2%	0%	0%
Somewhere else	2%	2%	3%	1%	11%	29%

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):	*69*	*69*	*22*	*22*	*4*	*4*
A private **home** or apartment	**48%**	**44%**	**46%**	**52%**	88%	55%
A **workplace** or office	7%	5%	8%	0%	0%	0%
A **shop** or shopping centre	**10%**	**15%**	**15%**	**10%**	0%	0%
A **pub, club** or other similar type of location	**20%**	**17%**	**16%**	**23%**	0%	0%
In a **CBD**, town centre or other busy area	6%	1%	4%	4%	0%	0%
At an **event**	1%	4%	4%	4%	12%	33%
At an **airport**	0%	0%	0%	6%	0%	0%
At a **train station** or other transport connection	0%	2%	0%	0%	0%	0%
Hospital or **medical** facility	1%	6%	0%	0%	0%	11%
Somewhere else	7%	4%	6%	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.

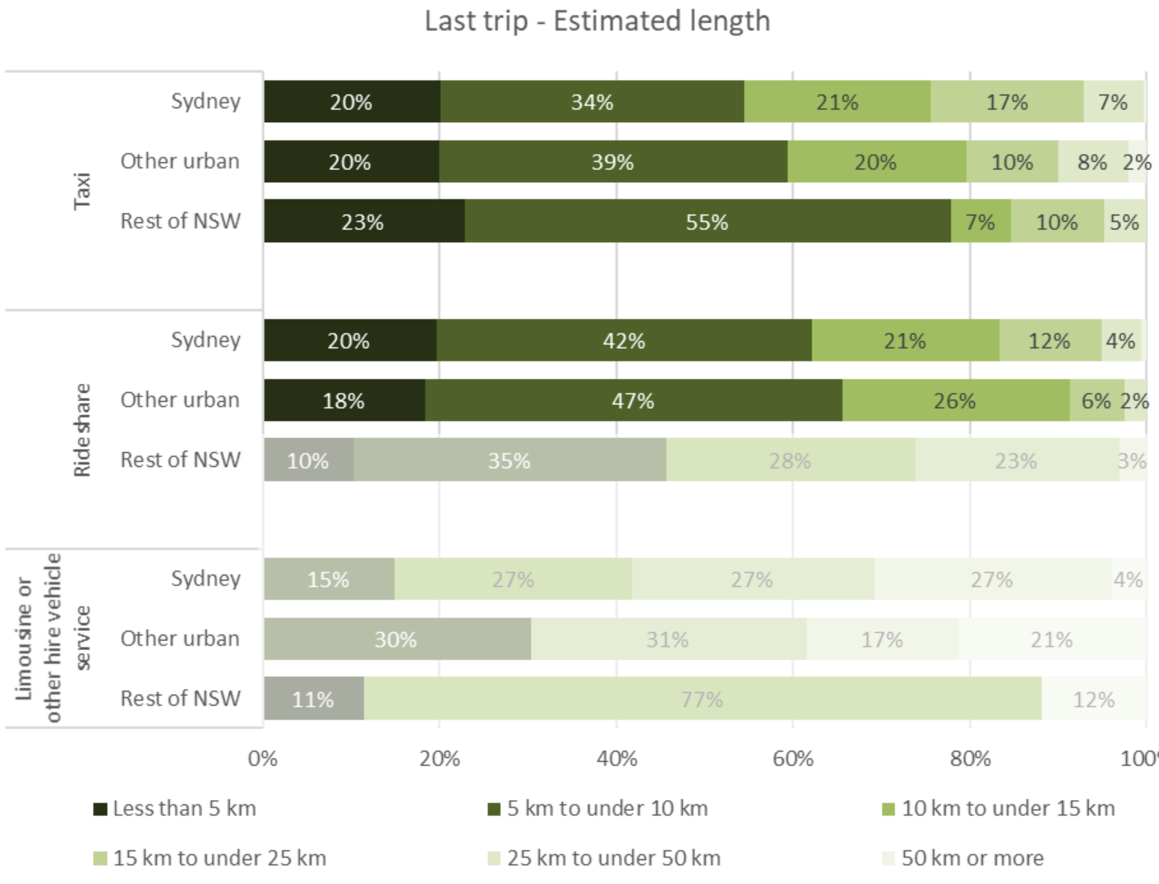
Length

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. In 2020 this effect was still visible, but not to the same extent as usual.

There appeared to be less variation in length of rideshare trips across locations than taxi trips (bearing in mind the smaller sample sizes outside Sydney) from 2017 to 2019 – but in 2020 the data in Sydney and Other Urban areas was very similar in this respect. Rideshare and taxi trips in Sydney and Other Urban areas are all estimated to be reasonably similar lengths in 2020.

Perhaps not surprisingly, trips in limousines or other hire vehicles tended to be somewhat longer, as is usually the case.

Figure 60: Last trip – Estimated length Q55



Base = Used transport in the last 6 months [Sydney n=26-715; Other Urban n=7-81; Rest of NSW n=4-69]

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 2020, 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 – as in 2019. 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 – again, continuing a pattern seen in 2019.

Overall, reasons for choice of vehicle type in 2020 were not at all dissimilar to previous years – and this is reinforced by only 1%-3% who explicitly said their choice of last vehicle type was a good option during COVID conditions.

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=	325	81	69	715	76	22	26	7	4
More convenient than driving	Main	22%	26%	28%	22%	33%	25%	15%	50%	0%
	Total	31%	28%	34%	33%	43%	38%	22%	71%	23%
Quicker to get / shorter waiting time	Main	19%	15%	20%	25%	14%	7%	3%	0%	55%
	Total	33%	18%	21%	42%	33%	20%	7%	0%	55%
Quicker or more direct travel time	Main	18%	4%	2%	11%	6%	4%	4%	0%	0%
	Total	33%	24%	5%	25%	13%	9%	14%	11%	0%
I didn’t have access to any other transport options	Main	12%	24%	26%	8%	6%	0%	4%	0%	0%
	Total	19%	31%	42%	14%	14%	6%	9%	11%	77%
More convenient than other paid transport options I could have used	Main	6%	5%	4%	9%	8%	26%	28%	11%	0%
	Total	20%	20%	11%	26%	28%	41%	35%	23%	0%
Cheaper than alternatives	Main	2%	2%	0%	12%	14%	16%	7%	0%	0%
	Total	6%	7%	4%	26%	30%	27%	12%	11%	12%
More reliable than alternatives	Main	2%	4%	4%	2%	2%	0%	8%	0%	0%
	Total	8%	7%	7%	11%	15%	10%	38%	0%	12%
Makes different types of vehicle (like a van, ute or luxury car) available	Main	1%	0%	0%	1%	4%	2%	7%	39%	12%
	Total	2%	3%	1%	3%	5%	2%	18%	49%	12%
It’s what I am most comfortable or familiar using	Main	4%	4%	6%	3%	7%	6%	17%	0%	33%
	Total	10%	11%	13%	12%	14%	36%	32%	0%	45%
It was a good option to use during COVID conditions	Main	2%	3%	1%	2%	3%	8%	4%	0%	0%
	Total	5%	3%	2%	8%	4%	15%	15%	17%	33%
Other	Main	12%	14%	10%	4%	3%	6%	4%	0%	0%
	Total	15%	17%	17%	6%	6%	6%	4%	0%	0%

Base = Used transport in the last 6 months

Obtaining a Vehicle

The bulk of taxis (72%-82%) are obtained through a combination of rank and hail, and by phoning taxi companies (figures in all regions were slightly down on the 75%-91% in 2019). In Sydney rank and hail represented half of all most recent taxi trips (50%) – though rank dropped from 33% in 2019 to just 22% in 2020. The proportion of taxis obtained on the internet has increased through 2019 and 2020. Outside of Sydney the proportions switch to be more dominantly from telephone, and hailing accounts for a very small proportion only. Internet booking is not used in the rest of NSW region.

Rideshare is almost exclusively obtained by smartphone apps (more than three quarters of all last rideshares in Sydney were obtained this way) or by an internet booking. In 2019 and 2020 there has been a slight trend towards internet bookings compared to using smartphone apps, but the balance still lies very much with apps. 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, which are the traditional methods seen with this type of transport.

Figure 62: Last trip – Method of obtaining vehicle Q41

Last trip – Method of obtaining vehicle	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
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	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
At a **taxi rank**	**22%**	**31%**	**22%**						
Hailed/waved down on the street	**27%**	3%	2%						
Rank + hail	**50%**	**34%**	24%						
Phoned a taxi company	**22%**	**41%**	**58%**						
Rank + hail + phone taxi company	**72%**	**75%**	**82%**						
By calling a **phone number**				2%	6%	0%	**23%**	**31%**	**88%**
By **internet booking**	14%	13%	0%	10%	19%	15%	**30%**	**58%**	0%
Contacted a **driver directly**	6%	4%	6%	2%	0%	8%	**30%**	0%	12%
Had a **regular booking**	2%	3%	0%	3%	5%	4%	9%	0%	0%
Used a **smartphone application** (app)	3%	2%	12%	**80%**	**69%**	**56%**	4%	0%	0%
Some **other way**	1%	3%	1%	1%	1%	12%	0%	0%	0%
Not sure, someone else organised it	4%	1%	0%	2%	1%	4%	5%	11%	0%

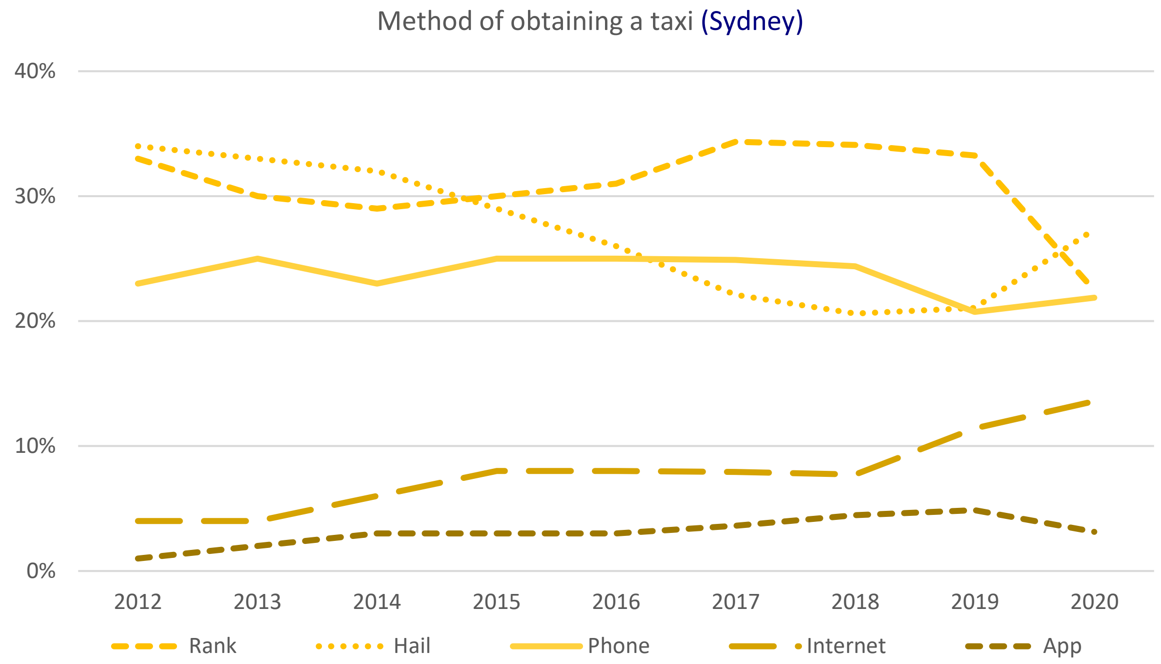
NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

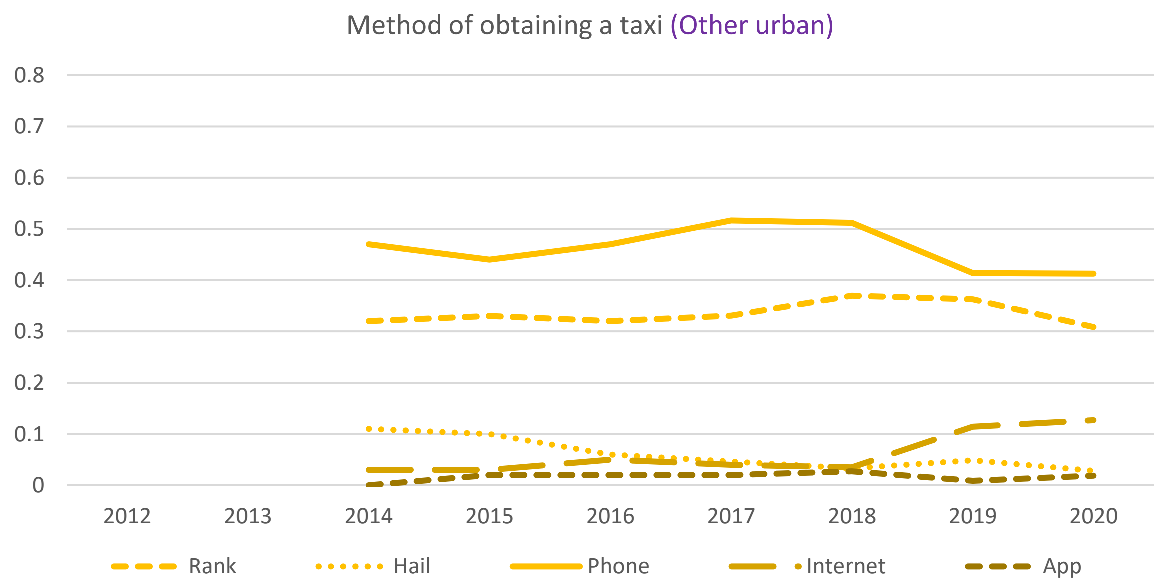
Bold figures = 20%+ of category. Note small base sizes in some cases.

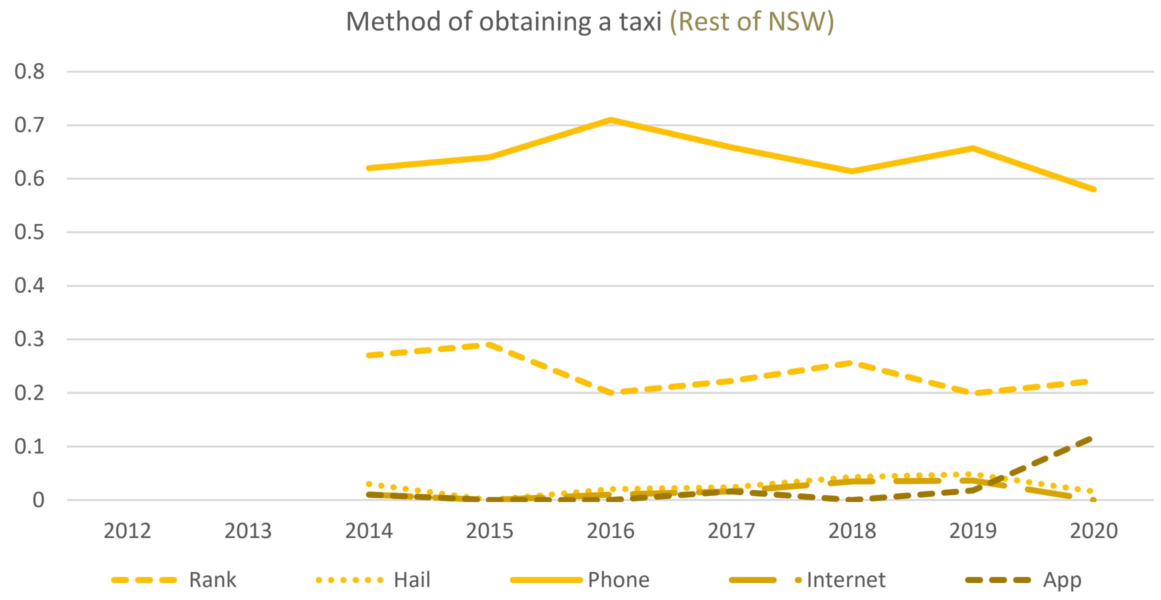
The most substantive change over time in how taxis are obtained has been the increase in taxis obtained via internet bookings and via an app (see tracking charts next page). This change seems to be primarily reducing reliance on hailing one in the street. Outside of this change, the relative proportions of different methods have maintained relatively steady. In 2020 there was a sharp decline in the use of ranks to get taxis.

Outside of Sydney, most taxis are obtained by phone or from a rank, with hailing in particular much less common.

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







In 2020 there was a somewhat greater reliance on ASAP / next available bookings rather than cars pre-booked for a particular time, and this was seen across both taxis and rideshare. 62% of booked taxis were ASAP bookings in Sydney in 2020, up from 55% in 2019. The equivalent figure for rideshare was 92%, up from 88%. Similar patterns were seen in the relatively small number of users in the rest of NSW region, though the differences in Other Urban areas were less consistent.

As usual, the majority of limousines and other hire vehicles were booked for a particular time.

Figure 64: Last trip – Type of booking Q48

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

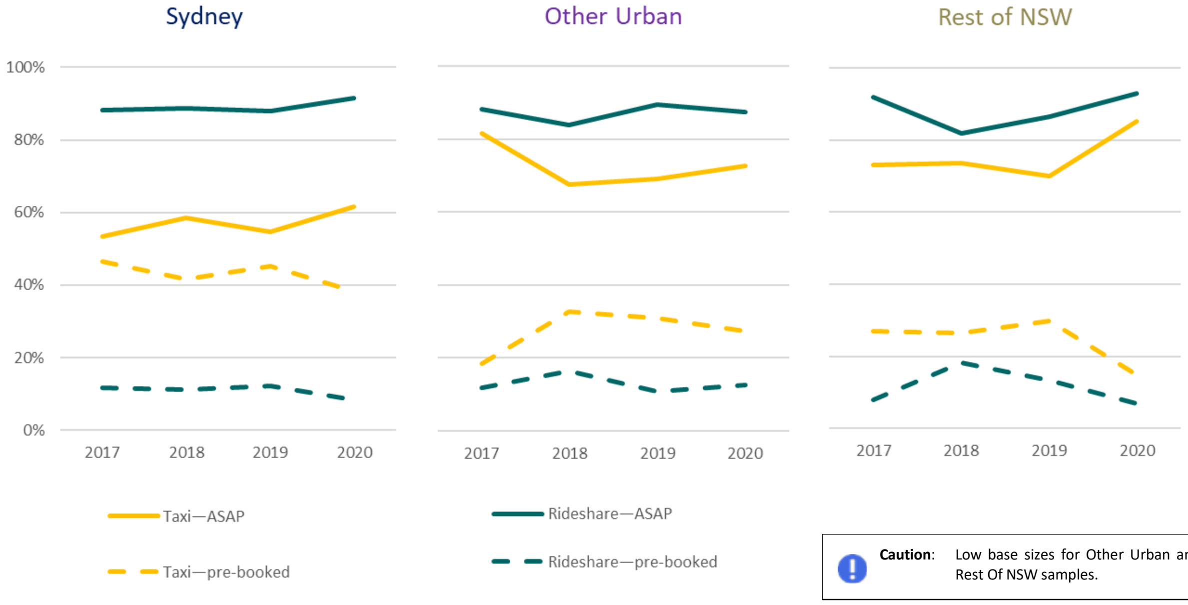
Last trip – Method of obtaining vehicle	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Booked the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*143*	*49*	*53*	*677*	*70*	*17*	*23*	*6*	*4*
As soon as possible / the next available	**62%**	**73%**	**85%**	**92%**	**87%**	**93%**	4%	0%	88%
For a particular time	**38%**	**27%**	15%	8%	13%	7%	**96%**	100%	12%

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 four surveys doesn't show any obvious trendline.

These tracking charts do show the slightly higher tendency for ASAP bookings in 2020.

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

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



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

Awareness of service provider

Awareness of service provider names in 2020 was effectively identical to 2019. The great majority of rideshare users report that they know the name of the service they used, while far fewer users of taxis do, especially those who are using rank and hail taxis.

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

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	Sydney	Other urban	Other urban	Rest of NSW	Rest of NSW
	Rank & Hail	Booked	Rank & Hail	Booked	Rank & Hail	Booked
Sample size	*162*	*125*	*27*	*47*	*15*	*50*
Aware	16%	38%	14%	40%	12%	38%
"Think so"	3%	5%	8%	11%	15%	10%
Not aware	**81%**	**58%**	**78%**	49%	**72%**	**52%**

	Rideshare Services			Limousines or Other Hire Vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
	Booked	Booked	Booked	Booked	Booked	Booked
Sample size	*663*	*70*	*16*	*15*	*6*	*3*
Aware	**80%**	**73%**	**81%**	22%	24%	13%
"Think so"	1%	3%	4%	0%	0%	0%
Not aware	19%	24%	14%	**78%**	**76%**	**87%**

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

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

Consideration of booking when using rank and hail

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 to the 18% seen in 2019. Outside of Sydney, due to the small sample size, these results should be considered as purely indicative.

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:	20%	14%	42%
Sample size	*162*	*27*	*15*

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 once again having 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.

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	67%	57%	46%
You did not want to pay a booking fee	25%	0%	0%
You didn't think a booked taxi would arrive any faster	20%	0%	44%
You wanted to be anonymous	11%	0%	10%
You didn't have access to a phone or the internet to make a booking	6%	43%	0%
You didn't know how to book a taxi or other vehicle	3%	0%	0%
Something else	3%	0%	0%
Sample size	*32*	*3*	*6*

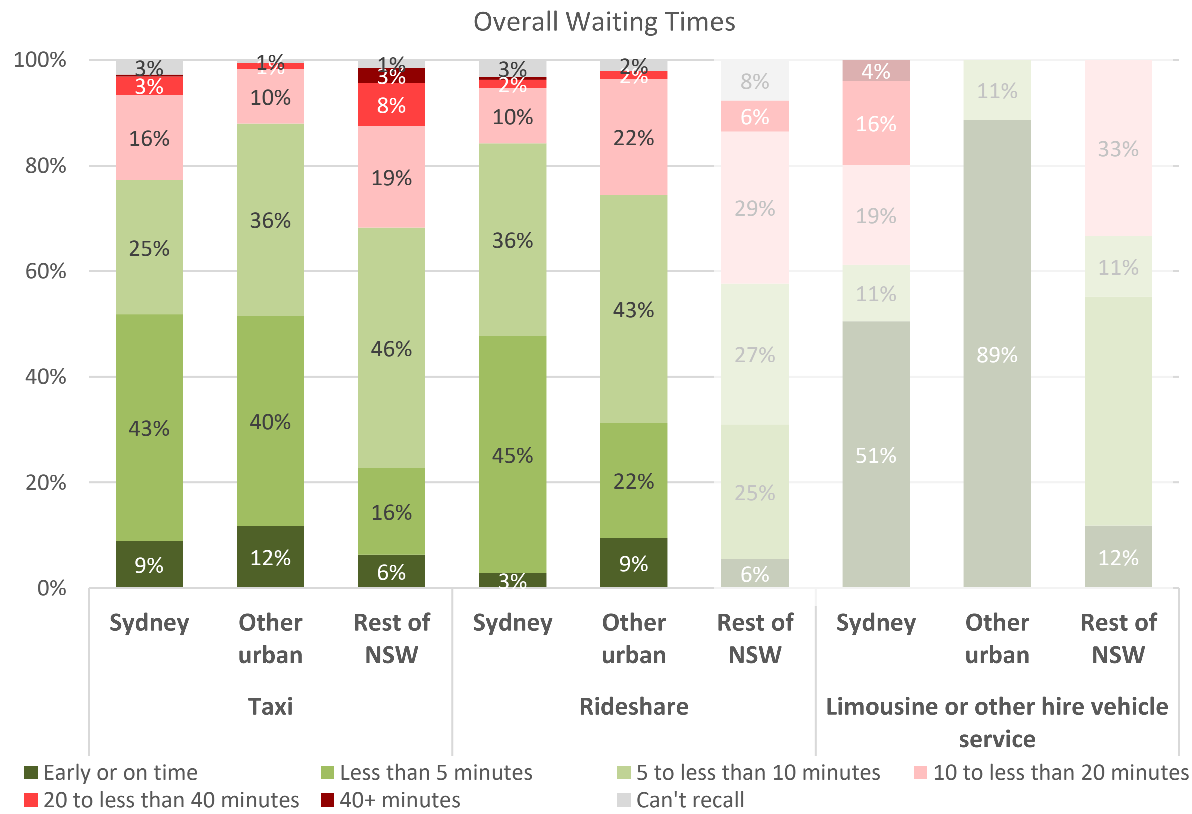
Base = Used Rank or Hail taxi for the last trip AND considered calling or booking transport

Waiting Time

Despite waiting times and availability being perceived to be strong competitive advantages of rideshare services over taxis in general, there was once again virtually no reported differences on the last time used, and if anything, taxis were once again 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.

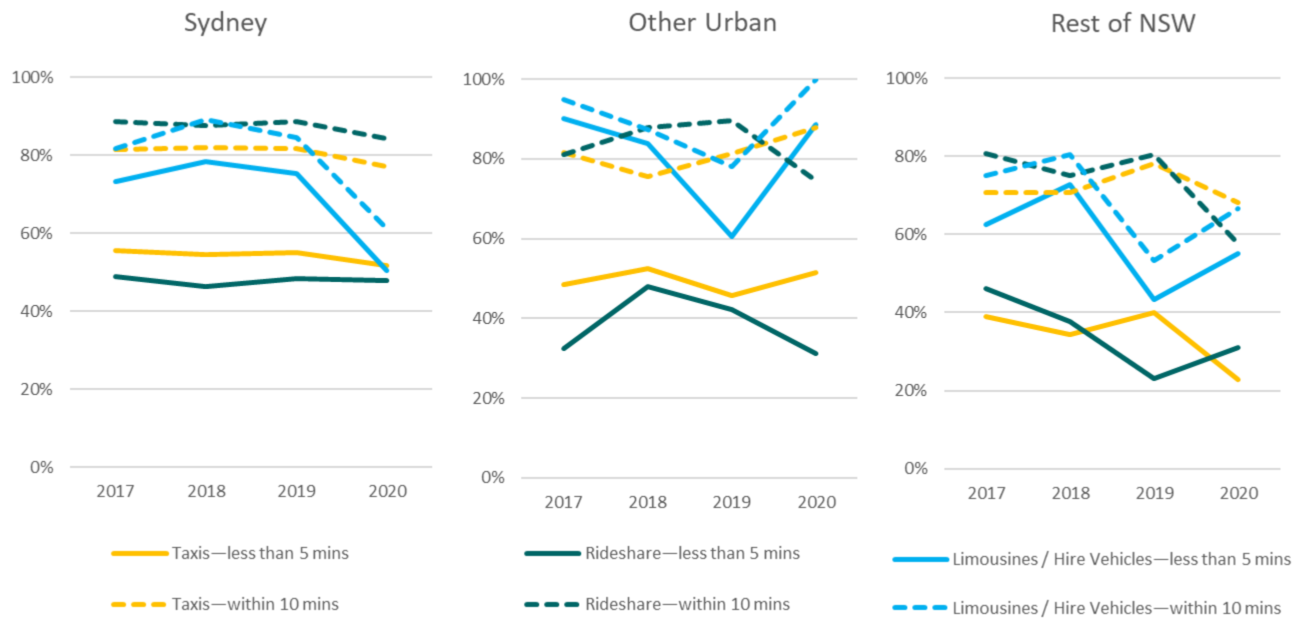
Figure 69: Overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52

Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
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	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Early or on time (pre-booking only)	9%	12%	6%	3%	9%	6%	51%	89%	12%
Less than 5 minutes	43%	40%	16%	45%	22%	25%	0%	0%	43%
Within 5 minutes	**52%**	**52%**	**23%**	**48%**	**31%**	**31%**	**51%**	**89%**	**55%**
5 to less than 10 minutes	25%	36%	46%	36%	43%	27%	11%	11%	11%
Within 10 minutes	**77%**	**88%**	**68%**	**84%**	**74%**	**58%**	**61%**	**100%**	**67%**
10 to less than 20 minutes	16%	10%	19%	10%	22%	29%	19%	0%	33%
20 to less than 40 minutes	3%	1%	8%	2%	2%	6%	16%	0%	0%
40 or more minutes	0%	0%	3%	0%	0%	0%	4%	0%	0%
Can't recall	3%	1%	1%	3%	2%	8%	0%	0%	0%



Base = Last trip within last 6 months [Sydney n=26-715; Other Urban n=7-81; Rest of NSW n=4-69]

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 reported waiting times through ASAP booking for taxis and rideshare, for the directly comparable ASAP bookings category, rideshare users *did* report shorter wait times than taxis in all locations. For pre-booked cars, taxis were a little more likely to arrive early or on time.

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

Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
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	77%	78%	53%						
5 to less than 10 minutes	16%	22%	28%						
10 to less than 20 minutes	3%	0%	12%						
20 to less than 40 minutes	0%	0%	0%						
More than 40 minutes	0%	0%	0%						
Can't recall	4%	0%	7%						
Sample	73	25	14						
Hail									
Less than 5 minutes	66%	0%	0%						
5 to less than 10 minutes	17%	61%	0%						
10 to less than 20 minutes	13%	39%	100%						
20 to less than 40 minutes	3%	0%	0%						
More than 40 minutes	0%	0%	0%						
Can't recall	1%	0%	0%						
Sample	89	2	1						
ASAP booking									
Less than 5 minutes	16%	24%	6%	49%	24%	25%	0%	0%	-
5 to less than 10 minutes	47%	51%	58%	39%	51%	36%	0%	0%	-
10 to less than 20 minutes	28%	21%	23%	9%	23%	33%	100%	0%	-
20 to less than 40 minutes	6%	3%	8%	0%	0%	5%	0%	0%	-
More than 40 minutes	1%	0%	5%	0%	0%	0%	0%	0%	-
Can't recall	2%	1%	0%	2%	2%	0%	0%	0%	-
Sample	87	36	45	623	61	15	1	0	3
Pre-booking									
It was early or on-time	48%	62%	57%	27%	57%	56%	55%	100%	100%
Less than 5 minutes	15%	15%	8%	14%	9%	44%	0%	0%	0%
5 to less than 10 minutes	15%	23%	10%	24%	3%	0%	12%	0%	0%
10 to less than 20 minutes	15%	0%	0%	21%	21%	0%	11%	0%	0%
20 to less than 40 minutes	5%	0%	25%	8%	9%	0%	17%	0%	0%
More than 40 minutes	0%	0%	0%	3%	0%	0%	4%	0%	0%
Can't recall	1%	0%	0%	3%	0%	0%	0%	0%	0%
Sample	61	15	8	73	12	3	24	6	1

Waiting time estimates

Waiting time estimates are extremely common for ASAP booked rideshares, with less than 3% who were confident they were <u>not</u> given a waiting time estimate.

For ASAP taxis, providing waiting time estimates is less widespread, though still common. 51%-58% of booked taxis gave a waiting time estimate in 2020, similar to the 2019 figures given the sample sizes involved.

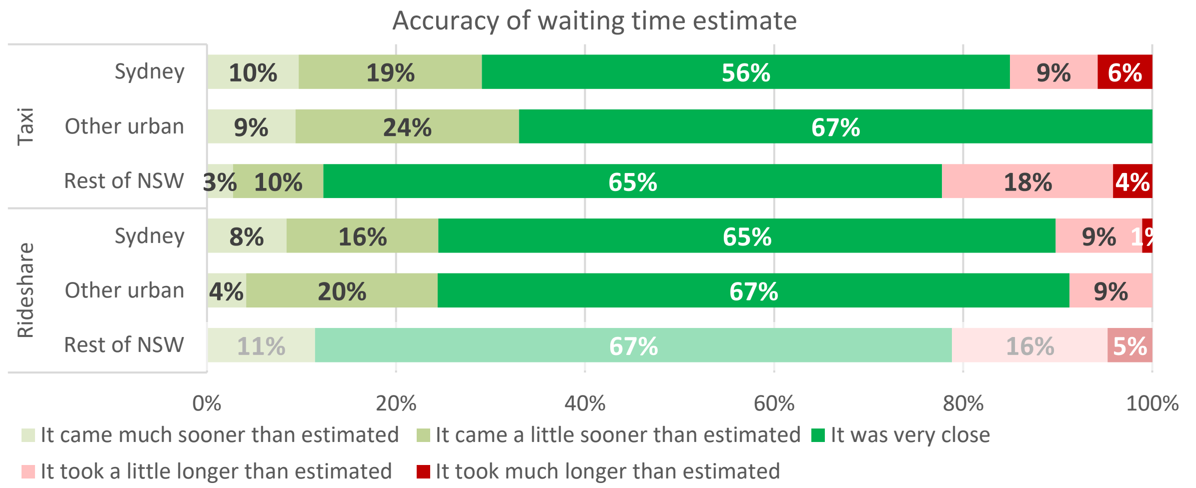
Figure 72: Last trip – Prevalence of being given a waiting time estimate for ASAP bookings Q49

Last trip – Given waiting time estimate	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months and made ASAP booking	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*87*	*36*	*45*	*623*	*61*	*15*	*1*	*0*	*3*
Yes	58%	51%	55%	94%	95%	100%	0%	-	62%
No	27%	30%	29%	1%	3%	0%	100%	-	38%
Can't recall	15%	19%	15%	5%	2%	0%	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.

Sample sizes here are very small for comparison across transport types, or locations. However, if anything, respondents from the rest of NSW region appear to feel that vehicles are the most likely to arrive outside the estimated timeframe.

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



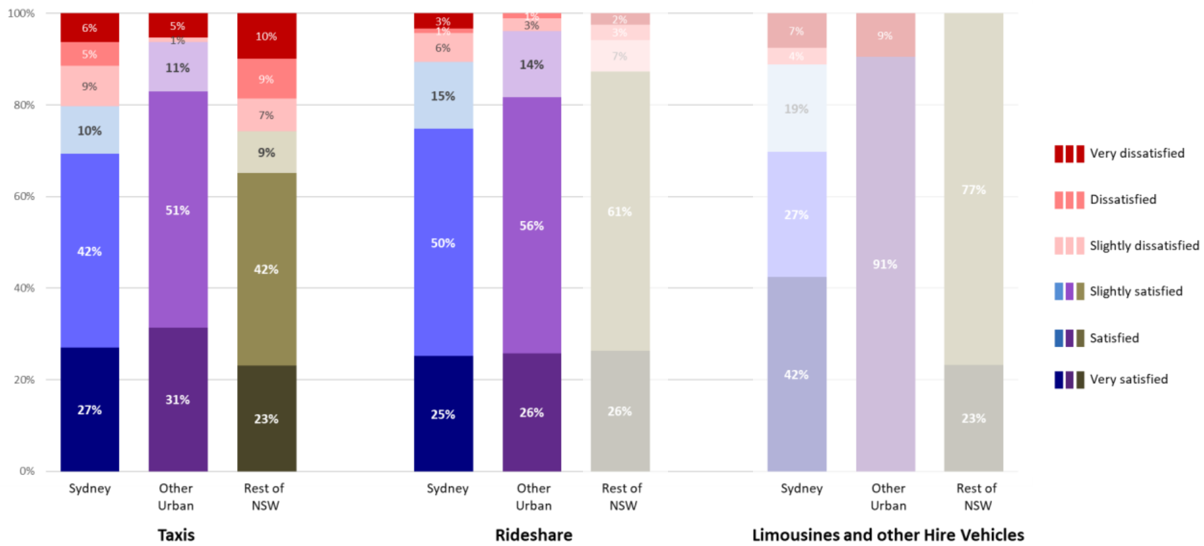
Base = Last trip within last 6 months by ASAP booking and given a waiting time estimate
[Sydney n=51-585; Other Urban n=16-58; Rest of NSW n=15-23]

Satisfaction with waiting times

Satisfaction with waiting times remains strong and fairly consistent, above 80% across all locations and types of transport service, though there were some small variations.

- Satisfaction with rideshare waiting times remains 2%-13% higher than with taxis in all locations.
- Satisfaction was lowest in the rest of NSW, and highest in Other Urban areas.

Figure 74: Last trip – Satisfaction with waiting time Q54



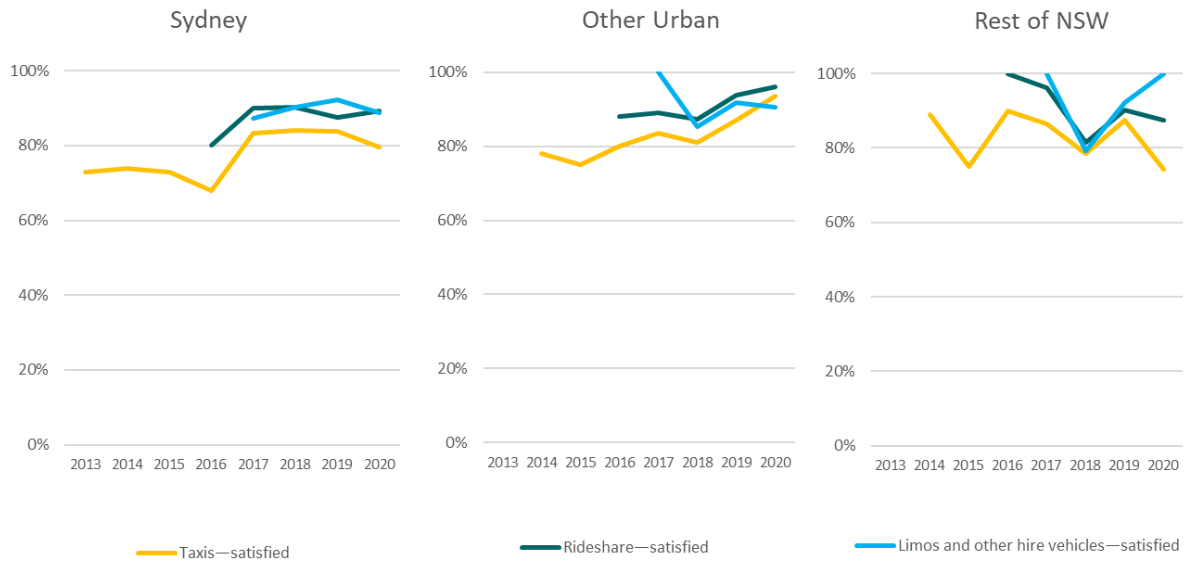
Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Very Satisfied	27%	31%	23%	25%	26%	26%	42%	91%	23%
Satisfied	42%	51%	42%	50%	56%	61%	27%	0%	77%
Slightly satisfied	10%	11%	9%	15%	14%	0%	19%	0%	0%
Total satisfied	**80%**	**94%**	**74%**	**89%**	**96%**	**87%**	**89%**	**91%**	**100%**
Slightly dissatisfied	9%	1%	7%	6%	3%	7%	0%	0%	0%
Dissatisfied	5%	0%	9%	1%	1%	3%	4%	0%	0%
Very dissatisfied	6%	5%	10%	3%	0%	2%	7%	9%	0%
Total dissatisfied	**20%**	**6%**	**26%**	**11%**	**4%**	**13%**	**11%**	**9%**	**0%**

Satisfaction with waiting times in Sydney has remained mostly stable across the four surveys conducted with the new methodology, and for taxis, consistently high in comparison to the pre-2017 results – even allowing for the slight drop seen in 2020.

In all areas rideshare is consistently somewhat ahead of taxis.

Both services have seen similar increases in wait time satisfaction in Other Urban areas from 2018-2020. The rest of NSW fluctuates more with smaller sample sizes, but satisfaction with waiting times for all services remains in the same high section of the chart as in other areas.

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



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

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 is used for comparison.*

As per 2019, reported taxi fares in 2020 were higher in Sydney than outside of Sydney (likely reflecting 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 – identical to 2019. By comparison, 31% of Sydney rideshare fares were under $20 and 53% were under $40 – slightly higher proportions than 2019.

In Other Urban areas the sample size is much smaller, but both taxi fares and rideshare fares were reported to be more like the distribution seen in 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*	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
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	*325*	*81*	*69*	*712*	*76*	*22*	*26*	*7*	*4*
Less than $10	1%	2%	2%	4%	4%	9%	0%	0%	0%
At least $10 and less than $20	14%	19%	23%	27%	26%	22%	0%	0%	11%
Less than $20	**15%**	**21%**	**25%**	**31%**	**30%**	**31%**	**0%**	**0%**	**11%**
At least $20 and less than $30	14%	16%	9%	16%	12%	36%	0%	0%	0%
At least $30 and less than $40	8%	10%	7%	6%	6%	4%	0%	0%	0%
Less than $40	**37%**	**47%**	**41%**	**53%**	**48%**	**71%**	**0%**	**0%**	**0%**
At least $40 and less than $60	11%	3%	1%	5%	4%	12%	7%	0%	0%
At least $60 and less than $100	7%	10%	3%	3%	2%	0%	8%	0%	0%
At least $100 and less than $150	4%	0%	0%	1%	0%	0%	23%	0%	55%
$150 or more	1%	2%	1%	1%	0%	0%	4%	38%	0%
$40 or more	**23%**	**16%**	**5%**	**10%**	**6%**	**12%**	**42%**	**38%**	**55%**
I'm not sure because someone else paid	20%	17%	28%	14%	24%	12%	23%	11%	0%
Can't recall	20%	21%	26%	24%	23%	5%	35%	50%	33%

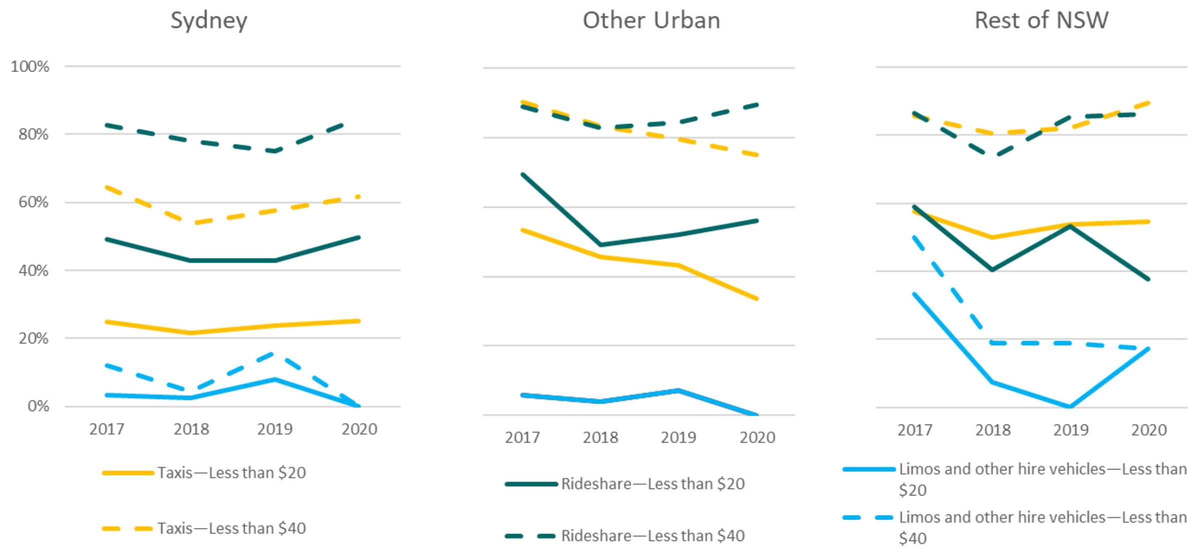
Last trip – Fares Paid ***Excluding:** Other paid / Can't recall*	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
*Sample size (after **excluding** other paid / can't recall)*	*197*	*54*	*36*	*442*	*41*	*18*	*11*	*3*	*3*
Less than $20	**25%**	**34%**	**55%**	**50%**	**56%**	**38%**	0%	0%	17%
Less than $40	**36%**	**41%**	**35%**	**35%**	**33%**	**48%**	**0%**	**0%**	**0%**
$40 or more	**38%**	**25%**	**11%**	**15%**	**11%**	**14%**	**100%**	**100%**	**83%**

Average fare (mean of exact $ estimates)	**$39**	**$34**	**$31**	**$26**	**$21**	**$23**	$112	$263	$85
Median (i.e. 50% more costly, 50% less costly)	**$30**	**$20**	**$16**	**$20**	**$18**	**$22**	$100	$268	$100

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 consistently greater than the equivalent proportions for taxis. In Other Urban areas these proportions have been much more closely aligned, but separated considerably in 2020.

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



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

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 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	$15	$12
5 km to under 10 km	$27	$20
10 km to under 15 km	$47	$26
15 km to under 25 km	$60	$52
25 km to under 50 km	$96	$63
50 km or more	-	$135
Total Sample	*323*	*711*

This table shows that Sydney users of rideshare services continue to report a lower average fare than users of taxi services for trips of the same estimated length. This pattern strongly supports (or reinforces) the enduring perception that one of the primary advantages of rideshare is the cost or value proposition. A similar pattern has been apparent in previous years.

Sample sizes in other urban areas were too small to consider in 2020, but in previous years 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 in Sydney (see next page) shows that respondents whose most recent taxi was obtained by hailing or calling a taxi company was somewhat lower than those obtained from ranks or by 'other methods'. This relative pattern of higher and lower fares based on method of obtaining them was also seen in 2019.

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:	**$42**	$23	$19
Less than $10	4%	0%	0%
At least $10 and less than $20	9%	40%	32%
At least $20 and less than $30	10%	2%	5%
At least $30 and less than $40	9%	12%	14%
At least $40 and less than $60	14%	4%	0%
At least $60 and less than $100	13%	5%	0%
At least $100 and less than $150	1%	0%	0%
$150 or more	1%	0%	0%
I'm not sure because someone else paid	*13%*	*11%*	*32%*
Can't recall	*24%*	*25%*	*17%*
Sample	73	25	14
Hail Average:	**$32**	-	$16
Less than $10	2%	0%	0%
At least $10 and less than $20	23%	0%	100%
At least $20 and less than $30	13%	0%	0%
At least $30 and less than $40	11%	0%	0%
At least $40 and less than $60	8%	0%	0%
At least $60 and less than $100	3%	0%	0%
At least $100 and less than $150	4%	0%	0%
$150 or more	0%	0%	0%
I'm not sure because someone else paid	*20%*	*61%*	*0%*
Can't recall	*15%*	*39%*	*0%*
Sample	89	2	1
Called taxi company Average:	**$35**	$38	$24
Less than $10	0%	5%	3%
At least $10 and less than $20	14%	11%	23%
At least $20 and less than $30	14%	19%	11%
At least $30 and less than $40	10%	6%	4%
At least $40 and less than $60	7%	5%	2%
At least $60 and less than $100	7%	5%	5%
At least $100 and less than $150	3%	0%	0%
$150 or more	0%	5%	0%
I'm not sure because someone else paid	*18%*	*19%*	*24%*
Can't recall	*28%*	*26%*	*28%*
Sample	72	37	44
All other methods Average:	**$47**	$40	$92
Less than $10	0%	0%	0%
At least $10 and less than $20	7%	8%	8%
At least $20 and less than $30	16%	29%	9%
At least $30 and less than $40	3%	16%	6%
At least $40 and less than $60	17%	0%	0%
At least $60 and less than $100	6%	26%	0%
At least $100 and less than $150	6%	0%	0%
$150 or more	1%	0%	6%
I'm not sure because someone else paid	*27%*	*16%*	*36%*
Can't recall	*17%*	*5%*	*35%*
Sample	91	17	10

Fare estimates

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

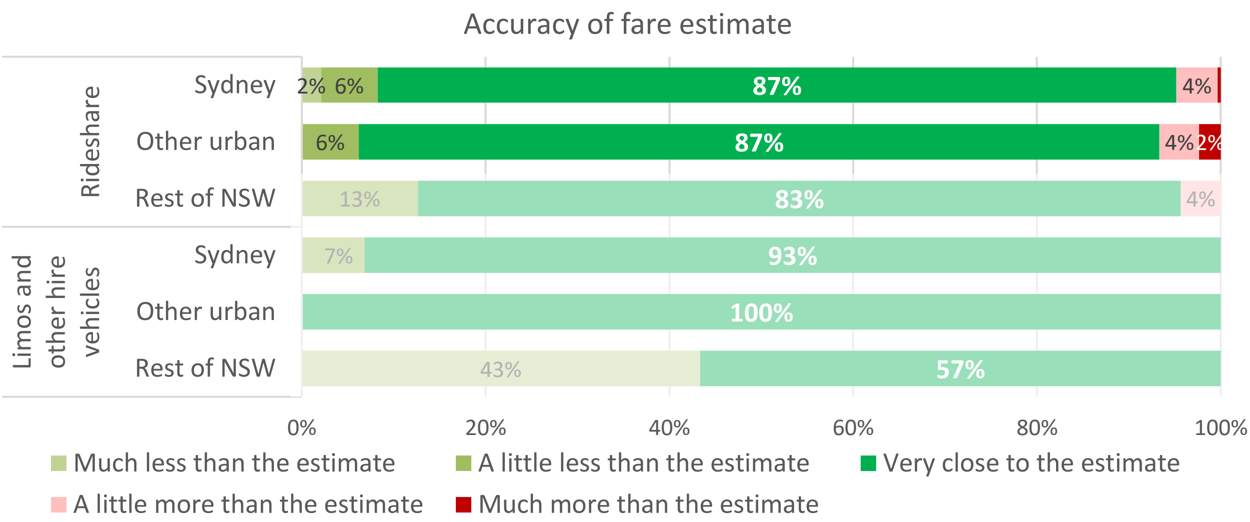
Figure 79: Last trip – Prevalence of being given a fare estimate for hire vehicle bookings Q58

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	*715*	*76*	*22*	*26*	*7*	*4*
Yes	81%	77%	80%	53%	79%	100%
No	7%	5%	14%	38%	10%	0%
Can't recall	*12%*	*18%*	*6%*	9%	11%	*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 87% customers said the estimate was *very close to the final fare*, while the same proportion of a smaller number of customers in other urban areas said the same thing.

Compared to 2019, perceptions of the accuracy of fare estimates is generally slightly higher.

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



Base = Last trip within 6 months by rideshare and hire vehicle and given a fare estimate [Sydney n=14-583; Other Urban n=5-58; Rest of NSW n=4-18]

Comparing fares

Just over one-in-four rideshare users indicated that they compared prices for different hire vehicles prior to booking their trip. In Sydney 26% of rideshare users did, compared to 50% of limousine / other hire vehicle users. In Other Urban areas the comparable figures were 28% and 29%*; while in the Rest of NSW they were 36% and 25%*. Sample sizes outside Sydney are too small and variable for confident interpretation of trends, and results are provided as being indicative only.

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 two surveys. 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 quite 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 Q57

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	*528*	*55*	*14*	*13*	*5*	*3*
I always use that provider or service	49%	51%	28%	76%	29%	41%
I was happy with the price estimate I was given	52%	56%	73%	14%	54%	59%
Some other reason	10%	8%	6%	17%	17%	0%

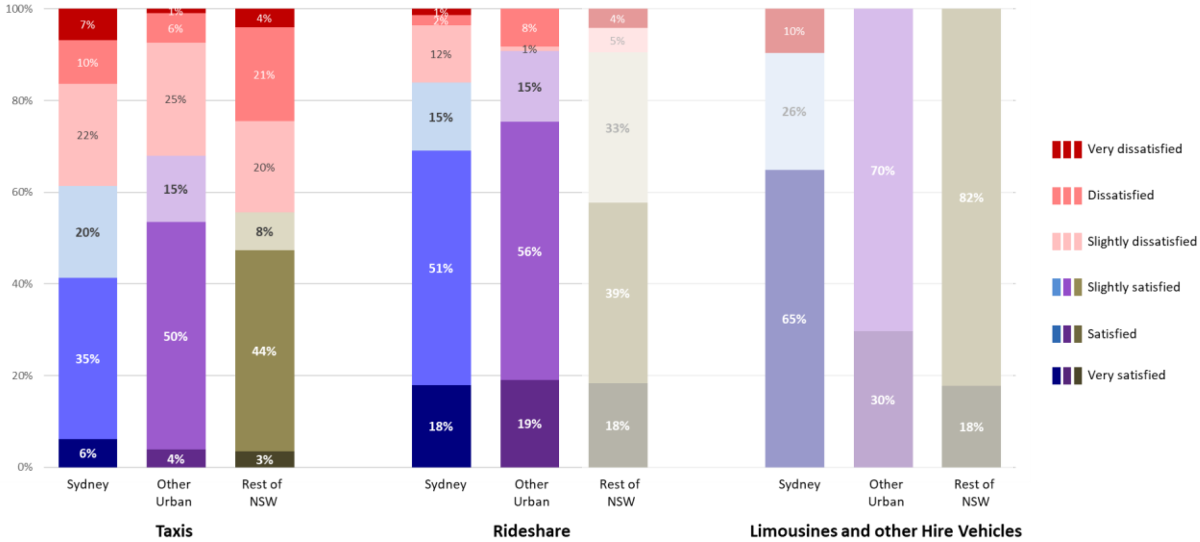
Satisfaction with fares

Consistent with perceptions of the relative cost and value of taxis and rideshare services in general, users of rideshare services are usually much more satisfied with the fare they paid for their last trip than are users of taxis, and this pattern remains very evident in 2020.

56%-68% of users of taxis considered themselves *at least slightly satisfied*. For rideshare, the equivalent figures were 84%-91%. The proportion of taxi users who said they were *dissatisfied* or *very dissatisfied* was also considerably higher at 32%-44% compared to 9%-16% for rideshare.

There were relatively small differences in satisfaction with taxi fares between Sydney and other locations. If anything, those in Other Urban areas were slightly more satisfied, and those in the rest of NSW slightly less satisfied.

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



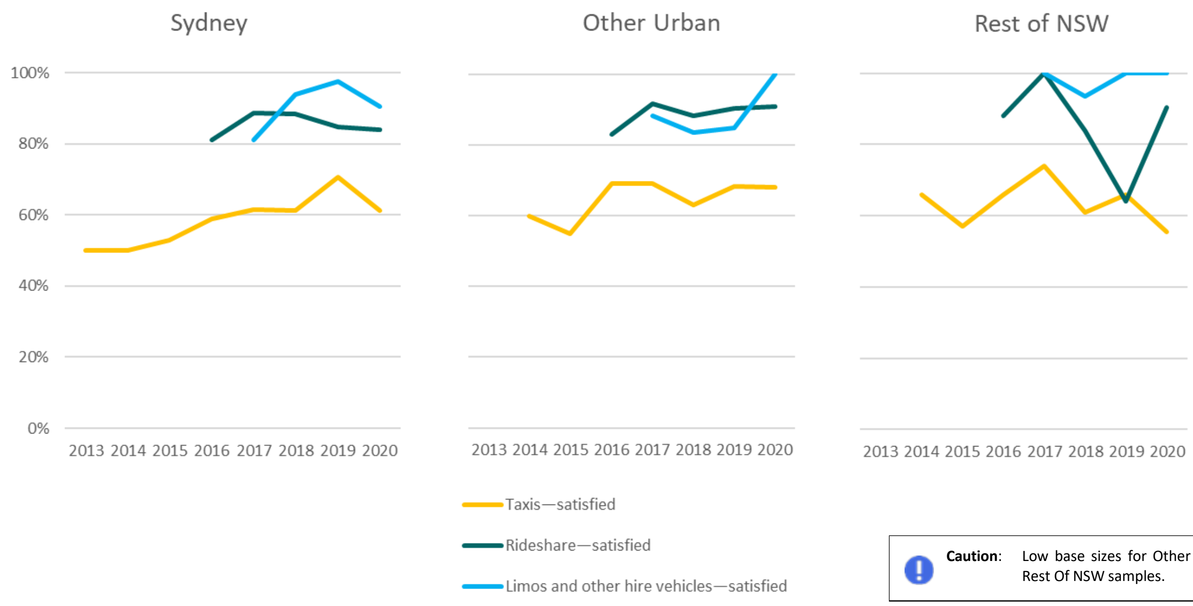
Last trip – Satisfaction with fares	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months (and recalled fare)	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*197*	*54*	*36*	*445*	*41*	*18*	*11*	*3*	*3*
Very Satisfied	6%	4%	3%	18%	19%	18%	65%	30%	18%
Satisfied	35%	50%	44%	51%	56%	39%	0%	70%	82%
Slightly satisfied	20%	15%	8%	15%	15%	33%	26%	0%	0%
Total satisfied	**61%**	**68%**	**56%**	**84%**	**91%**	**91%**	**90%**	**100%**	**100%**
Slightly dissatisfied	22%	25%	20%	12%	1%	5%	0%	0%	0%
Dissatisfied	10%	6%	21%	2%	8%	0%	0%	0%	0%
Very dissatisfied	7%	1%	4%	1%	0%	4%	10%	0%	0%
Total dissatisfied	**39%**	**32%**	**44%**	**16%**	**9%**	**9%**	**10%**	**0%**	**0%**

Satisfaction with taxi fares, while considerably lower than the equivalent figures for rideshare in all areas, had trended up from 2015-2019 in Sydney, with the reported figure in 2019 being sharply higher at 71%. The 2020 figure has fallen back to be more equivalent to those seen in 2017-2018 at 61%.

Satisfaction with rideshare fares has held fairly steady at the higher 80%+ level.   Despite being considerably higher, satisfaction with fares for limousines and other hire vehicles is strong in all locations and years.

There is naturally more fluctuation in the other areas due to the smaller sample sizes, but satisfaction with fares has been quite stable in Other Urban areas.

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



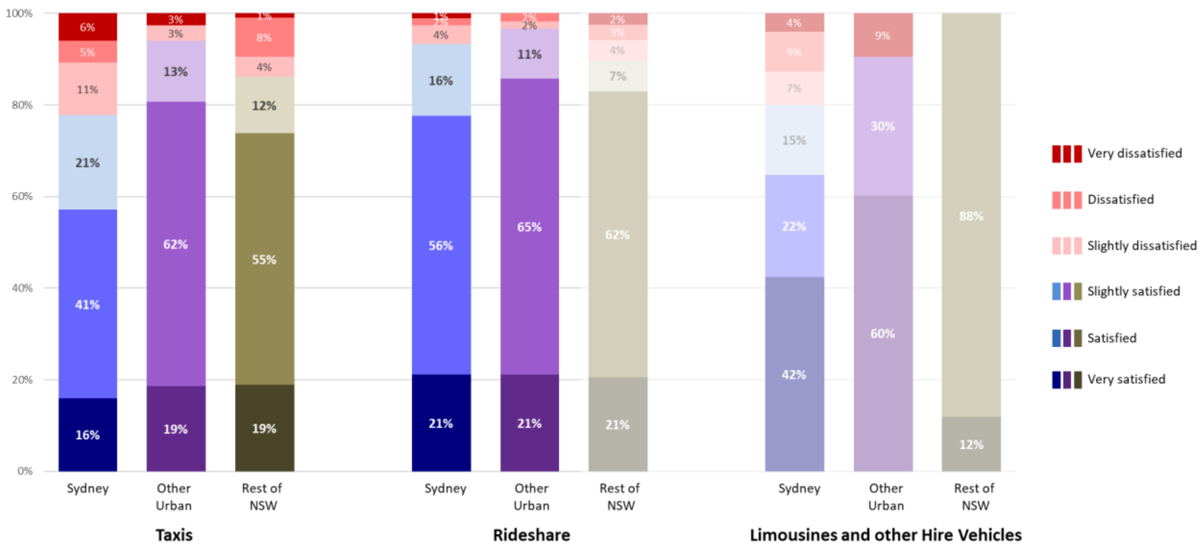
Caution: Low base sizes for Other Urban and Rest Of NSW samples.

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 is highest for rideshare in 2020, and slightly lower for taxis.
- Satisfaction is lowest in Sydney, and highest in Other Urban areas.

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

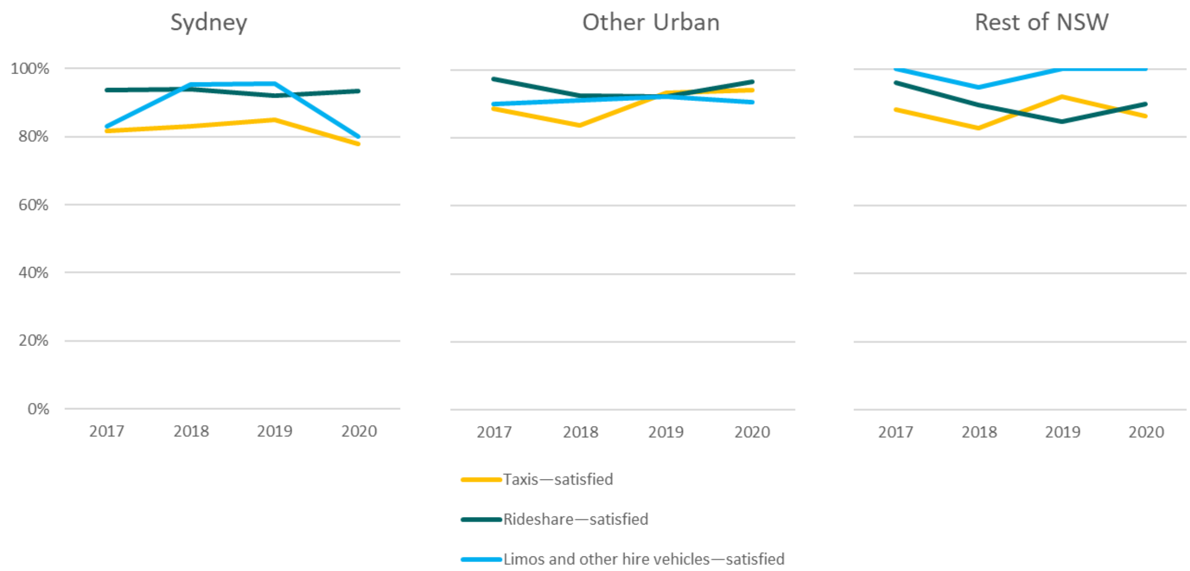


Last trip – Overall satisfaction	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Very Satisfied	16%	19%	19%	21%	21%	21%	42%	60%	12%
Satisfied	41%	62%	55%	56%	65%	62%	22%	30%	88%
Slightly satisfied	21%	13%	12%	16%	11%	7%	15%	0%	0%
Total satisfied	**78%**	**94%**	**86%**	**93%**	**97%**	**90%**	**80%**	**91%**	**100%**
Slightly dissatisfied	11%	3%	4%	4%	2%	4%	7%	0%	0%
Dissatisfied	5%	0%	8%	2%	2%	3%	9%	0%	0%
Very dissatisfied	6%	3%	1%	1%	0%	2%	4%	9%	0%
Total dissatisfied	**22%**	**6%**	**14%**	**7%**	**3%**	**10%**	**20%**	**9%**	**0%**

Overall last trip satisfaction has generally shown a small advantage for rideshare over taxis in all locations, and this is the case in all locations in 2020 – though only in Sydney to any appreciable extent.

- In Sydney, overall last trip satisfaction with both taxis and rideshare has remained quite stable in recent years. In 2019 the satisfaction of rideshare declined slightly whilst satisfaction with taxis increased, resulting in the smallest gap observed in the last three years – but in 2020 this pattern reversed and the gap enlarged again.
- In Other Urban areas, all respondents have given very similar satisfaction ratings for all three services for the last two years.
- In the Rest of NSW respondents were most satisfied with limousines, while satisfaction with taxis and rideshare sit at around the same levels, despite fluctuations typical of the smaller sample sizes available in this region.

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



COVID Considerations

In 2020 a number of additional questions were included in the last trip section of the survey, specifically relating to COVID considerations. In general, perceptions were higher outside of Sydney, and for rideshare services compared to taxis.

Confidence when using

The majority of point-to-point transport users were *at least somewhat confident* using this type of transport in a COVID environment when taking their last trip. However, in Sydney and other urban areas less than half of taxi or rideshare users were *totally or very confident* using that type of transport in a COVID environment. Just over half of users in other urban areas were. Rideshare users were more confident than taxi users in both locations.

Figure 86: Last trip – Confidence using in a COVID environment Q62A

Last trip –Confidence using in a COVID environment	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
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	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Totally confident	13%	17%	27%	14%	16%	9%	34%	50%	12%
Very confident	25%	34%	22%	34%	41%	39%	25%	17%	88%
Totally + very confident	**37%**	**51%**	**48%**	**48%**	**57%**	**48%**	**60%**	**67%**	**100%**
Somewhat confident	47%	44%	44%	43%	40%	40%	29%	22%	0%
Not very confident	12%	6%	8%	8%	1%	8%	8%	11%	0%
Not at all confident	4%	0%	0%	1%	2%	5%	3%	0%	0%
Not very + Not at all confident	**16%**	**6%**	**8%**	**9%**	**3%**	**12%**	**11%**	**11%**	**0%**

Cleanliness and sanitising

Although only between one-third to two-thirds of point-to-point transport users rated the cleanliness and sanitisation of their last trip vehicle as *good* from a COVID perspective, very few (just 2%-7%) rated this aspect as *unacceptable*. As per the general trends, ratings were higher for rideshare than taxis, and outside of Sydney.

Figure 87: Last trip – Perceptions of cleanliness and sanitising Q62B_1

Last trip – cleanliness and sanitising	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
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	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Good	33%	46%	43%	52%	59%	50%	62%	89%	67%
Acceptable	60%	51%	55%	46%	40%	48%	38%	11%	33%
Unacceptable	**7%**	**3%**	**1%**	**2%**	**2%**	**2%**	**0%**	**0%**	**0%**

Maintaining social distancing

Very few users of point-to-point transport rated the maintenance of social distancing on their last trip as *unacceptable* (0%-4%) – but also generally less than half rated it as *good*. Unlike cleanliness and sanitising, this did not vary quite as much outside of Sydney, though the tendency for rideshare to score higher was still seen.

Figure 88: Last trip – Perceptions of maintaining social distancing Q62B_2

Last trip – maintaining social distance	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
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	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Good	40%	44%	49%	49%	59%	43%	43%	89%	55%
Acceptable	56%	54%	50%	48%	39%	54%	57%	11%	45%
Unacceptable	**4%**	**3%**	**1%**	**2%**	**2%**	**2%**	**0%**	**0%**	**0%**

Use of masks

Use of masks was moderately common at the time of last trips (noting that these could have been up to six months prior to the survey). There are number of observations in what is reported about mask use:

- Rideshare drivers were considerably more likely to wear a mask than taxi drivers, but there was less difference in the proportion of customers wearing masks.
- Mask use was much higher in Sydney than outside Sydney.
- The majority of passengers who wore a mask had their own available to use.
- If multiple passengers are involved, mask wearing is about as likely as for a single passenger.

Figure 89: Last trip – Use of masks Q62C/D

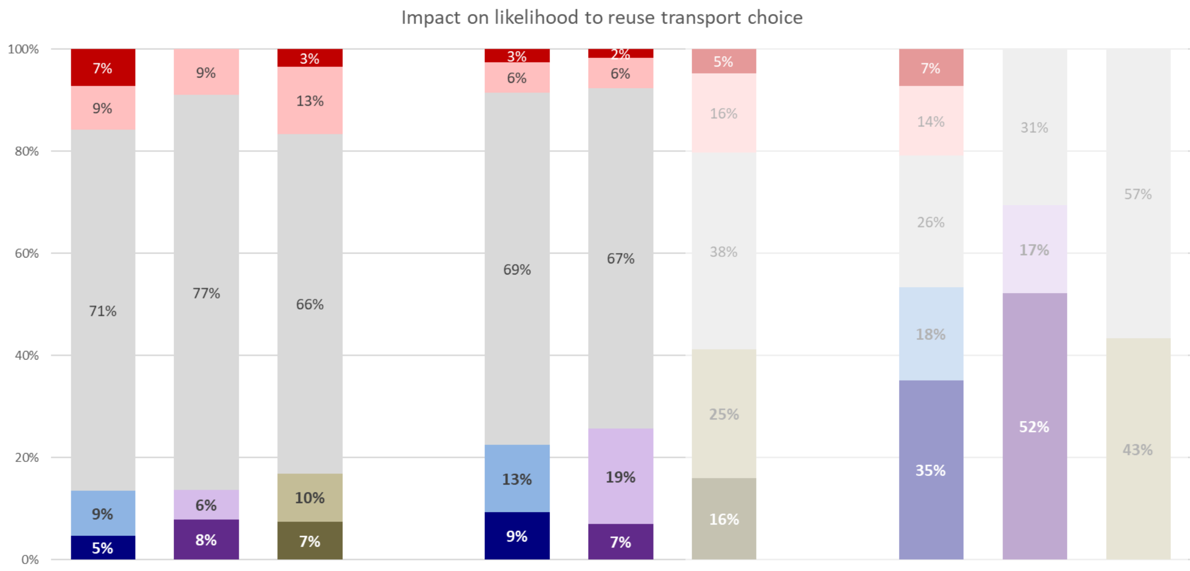
Last trip – use of masks	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Driver wore a mask	39%	27%	18%	57%	45%	44%	50%	36%	77%
Respondent wore a mask	44%	27%	16%	45%	20%	38%	38%	19%	43%
If wore mask – had own	91%	100%	100%	94%	91%	100%	100%	0%	100%
If wore mask – driver provided	5%	0%	0%	3%	9%	0%	0%	100%	0%
All other passengers wore a mask *Excludes 'not applicable'*	43%	19%	14%	41%	16%	47%	43%	24%	43%

Impact on intended use

Prior to 2020, across all transport services and locations, there was a nett positive differential impact on likelihood to re-use transport services again in the future. That is, at least as many respondents said the experience made them *more* likely to re-use a service as those who said it made them *less* likely to do so.

In 2020 the positive reinforcement effect was substantially lower – made up of a small increase in the proportions saying that they were *less likely* to re-use, and a substantial decline in the proportions saying they were *more likely* to do so. In previous years rideshare has had a considerably higher nett differential than taxis. In 2020 taxis had a virtually neutral differential (-2% - +5%), while rideshare was down from a 31%-46% positive differential in 2019 to 14%-21% in 2020.

Figure 90: Last trip – Impact on likelihood to re-use the transport service again Q63

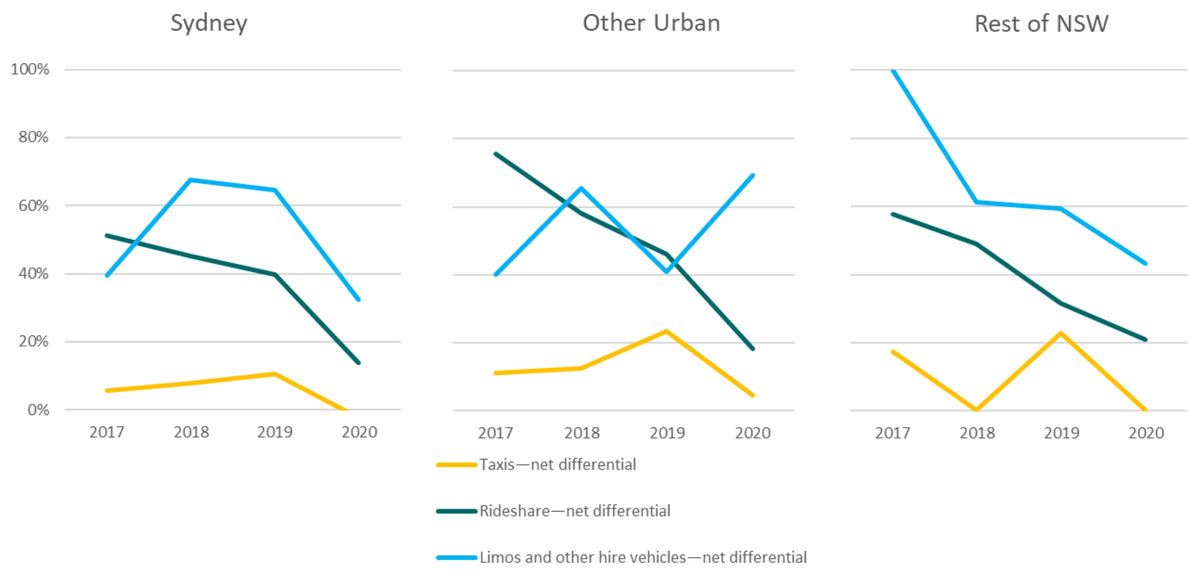


Last trip – Impact on using again	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*325*	*81*	*69*	*715*	*76*	*22*	*26*	*7*	*4*
Much more likely to use it again	5%	8%	7%	9%	7%	16%	35%	52%	0%
A little more likely to use it again	9%	6%	10%	13%	19%	25%	18%	17%	43%
Total more likely to re-use	**13%**	**14%**	**17%**	**22%**	**26%**	**41%**	**53%**	**69%**	**43%**
Had no impact	71%	77%	66%	69%	67%	38%	26%	31%	57%
A little less likely to use it again	9%	9%	13%	6%	6%	16%	14%	0%	0%
Much less likely to use it again	7%	0%	3%	3%	2%	5%	7%	0%	0%
Total less likely to re-use	**16%**	**9%**	**17%**	**9%**	**8%**	**20%**	**21%**	**0%**	**0%**
Differential impact (More likely minus less likely)	**-2%**	**+5%**	**0%**	**+14%**	**+18%**	**+21%**	**+32%**	**+69%**	**+43%**

The decline in reinforcement to reuse all transport types in all locations (with the exception of limousine and hire vehicles in Other Urban areas, but with a very small sample size) is very apparent in the tracking charts.

In 2019 the key narrative in the overall survey was the flattening of the rideshare growth phase, and the trend downwards in the positive reinforcement loop for users was noted as one of the key pieces of evidence for this. The tracking charts show that the difference in positive reinforcement between taxis and rideshare has been closing since 2017, and even with the general decline in 2020, has narrowed further.

Figure 91: Last trip – Change in impact on likelihood to re-use the transport service again Q63



G. Impact of COVID on point-to-point transport

The COVID-19 pandemic has been the defining event of 2020, and the 2020 point-to-point transport survey has confirmed the expectation that usage of such transport services has been substantially reduced. The survey has shown a seemingly larger impact on use of taxi services than on rideshare services, but that while volumes of use have reduced, patterns of use have not been that different.

Two new questions were introduced in the 2020 survey to explicitly explore the impact of COVID on the likelihood and confidence to use point-to-point transport services. Unsurprisingly, both indicators show a substantial (and very similar) nett negative impact.

Across all locations and transport types, the nett differential for likelihood of use was between -20% and -35%, while the range for confidence was -22% to -32%.

For taxis, the negative differential was highest in Sydney, and in Sydney was also slightly more negative to taxis than to rideshare – though to a smaller extent. The variability across regions for rideshare and limousines and other hire vehicles was lower than for taxis, but this was defined more by the slightly higher negative impact on taxis in Sydney.

It is clear and unsurprising that the impact of the COVID pandemic on point-to-point transport is a negative one, which has been clearly reflected in the wider 2020 survey results.

Figure 92: Perceived impact of COVID-19 (new questions) Q77

Impact of COVID-19 on: **Your likelihood of using**	Taxis			Rideshare			Limousines or other hire vehicles		
Base: All respondents	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*2026*	*508*	*407*	*2026*	*508*	*407*	*2026*	*508*	*407*
Higher	6%	7%	4%	10%	5%	3%	5%	5%	4%
Same	52%	63%	71%	53%	65%	71%	61%	66%	73%
Lower	42%	30%	25%	37%	30%	26%	34%	29%	24%
Differential Higher *minus* lower	**-35%**	**-23%**	**-21%**	**-27%**	**-25%**	**-24%**	**-29%**	**-25%**	**-20%**

Impact of COVID-19 on: **Your confidence in using**	Taxis			Rideshare			Limousines or other hire vehicles		
Base: All respondents	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*2026*	*508*	*407*	*2026*	*508*	*407*	*2026*	*508*	*407*
Higher	5%	4%	2%	8%	4%	4%	6%	4%	4%
Same	59%	67%	69%	59%	67%	61%	65%	70%	69%
Lower	36%	29%	29%	34%	29%	35%	29%	26%	28%
Differential Higher *minus* lower	**-32%**	**-24%**	**-26%**	**-26%**	**-24%**	**-31%**	**-23%**	**-22%**	**-24%**

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, Shebah, Ola or Didi	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, Shebah, Ola or Didi)	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, Shebah, Ola or Didi)	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, Shebah, Ola or Didi)	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, Shebah, Ola or Didi)	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, Shebah, Ola or Didi)	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
Because of things related to COVID	14	14	14
For another reason	13	13	13

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

18a. To what extent is your increased use of [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**”] to get around [LOCATION] in the last 12 months due to the impact of things related to COVID?

	A	B	C
	Taxis	**Rideshare services**	**Limousines or other hire vehicles**
Completely related to COVID	1	1	1
Mostly	2	2	2
Somewhat	3	3	3
Not very much	4	4	4
Not at all related to COVID	5	5	5

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
Because of things related to COVID	16	16	16
For another reason	15	15	15

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

19a. To what extent is your lower use of [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**"] to get around [LOCATION] in the last 12 months due to the impact of things related to COVID?

	A	B	C
	Taxis	**Rideshare services**	**Limousines or other hire vehicles**
Completely related to COVID	1	1	1
Mostly	2	2	2
Somewhat	3	3	3
Not very much	4	4	4
Not at all related to COVID	5	5	5

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, Shebah, Ola, Didi)			
		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, Shebah, Ola, Didi)			
		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, Shebah, Ola, Didi)	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 you personally experienced 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
Concerns about cleanliness or hygiene during COVID	12	12	12
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, Shebah, Ola, Didi)	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, Shebah, Ola, Didi)	1	2	3

ASK ONLY IF CODE 1-2 TO AT LEAST ONE IN Q33

33a. Is the change in your employer's views on employee transport related to COVID : SHOW ONLY OPTIONS SELECTED IN Q33

		Completely related to COVID	Partly related to COVID	Not related to COVID
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle** services (eg: Uber, Shebah, Ola, Didi)	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, Shebah, Ola, Didi)… 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
It was a good option to use during COVID conditions	☐11	☐11
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

These next few questions about your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"] are specifically in relation to COVID.

62A. On your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"], how confident were you using this type of transport in a COVID environment?
    (1) Totally confident
    (2) Very confident
    (3) Somewhat confident
    (4) Not very confident
    (5) Not at all confident

62B. From a COVID perspective, for that last trip how well did you consider:

		Good	Acceptable	Unacceptable
A	The vehicle to have been cleaned and sanitised	1	2	3
B	Social distancing to be maintained	1	2	3

62C. On that last trip in a [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service**"], did:

		Yes	No	Not applicable
A	The driver wear a mask	1	2	
B	You wear a mask	1	2	
C	All other passengers wear a mask	1	2	3

ASK IF PASSENGER WORE A MASK [q62C-B = CODE 1]

62D. You said that you wore a mask on that last trip. Did:

(1) You wear a mask of your own
(2) The driver provide the mask.
(3) Can't recall

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 (O) 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		
		✓	O	✗	✓	O	✗	✓	O	✗
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
K	Hygiene during COVID	☐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, Shebah, Ola, Didi)
    (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
If vehicle hygiene or cleanliness was improved	8	8	8
None of these improvements would make me use them more regularly	7	7	7

PART 7: COVID

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

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

77. Overall, what has been the impact of the COVID 19 pandemic on your level of use of these services, and how confident you would feel to use them:

	Taxis			Rideshare			Limousines or other hire vehicle services		
	Higher	Same	Lower	Higher	Same	Lower	Higher	Same	Lower
Your **use** of:	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
How **confident** you would feel to use:	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9

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

78. Right at the moment, what do you feel the impact of the COVID-19 situation is...

	Extremely negative impact				Small negative impact	No real impact	Small positive impact				Extremely positive impact
A. For you personally	-5	-4	-3	-2	-1	0	1	2	3	4	5
B. For Australia	-5	-4	-3	-2	-1	0	1	2	3	4	5

PART 8: OTHER DEMOGRAPHICS

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

73. 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

74. Do you have a physical disability

SINGLE RESPONSE

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

ASK IF HAVE DISABILITY (Q74=1)

75. 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 (Q74=1)

76. 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 2020 sample demographics versus quotas based on ABS population data. The 2020 survey sample was weighted to match the 2019 weighted sample, to maximise consistency.

Quotas (based on population)

Sydney	Male	Female	Total
16-29	12%	14%	27%
30-39	10%	9%	19%
40-49	9%	9%	18%
50-59	7%	8%	15%
60-69	6%	6%	11%
70+	5%	5%	10%
Total	49%	51%	100%

Reg City	Male	Female	Total
16-29	6%	12%	18%
30-39	6%	9%	15%
40-49	9%	10%	19%
50-59	8%	10%	18%
60-69	7%	7%	15%
70+	7%	9%	16%
Total	44%	56%	100%

Rest NSW	Male	Female	Total
16-29	10%	10%	20%
30-39	7%	8%	15%
40-49	8%	10%	18%
50-59	8%	9%	17%
60-69	8%	8%	16%
70+	7%	8%	15%
Total	48%	52%	100%

Actual 2020 sample

Sydney	Male	Female	Total
16-29	9%	15%	25%
30-39	11%	10%	21%
40-49	9%	9%	18%
50-59	8%	7%	15%
60-69	7%	6%	12%
70+	5%	4%	9%
Total	49%	51%	100%

Reg City	Male	Female	Total
16-29	5%	7%	11%
30-39	4%	9%	13%
40-49	5%	6%	12%
50-59	9%	7%	16%
60-69	15%	12%	27%
70+	14%	8%	21%
Total	51%	49%	100%

Rest NSW	Male	Female	Total
16-29	4%	5%	9%
30-39	5%	7%	12%
40-49	4%	10%	14%
50-59	11%	13%	24%
60-69	14%	10%	23%
70+	11%	8%	18%
Total	48%	52%	100%

Difference

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

Reg City	Male	Female	Total
16-29	-2%	-5%	-7%
30-39	-2%	0%	-2%
40-49	-4%	-3%	-7%
50-59	1%	-2%	-2%
60-69	7%	5%	12%
70+	7%	-1%	5%
Total	7%	-7%	0%

Rest NSW	Male	Female	Total
16-29	-6%	-5%	-11%
30-39	-2%	-1%	-3%
40-49	-4%	0%	-4%
50-59	2%	4%	7%
60-69	5%	2%	8%
70+	4%	-1%	3%
Total	0%	0%	0%

Appendix C: Detailed Strengths and Weaknesses

Figure 93: Detailed strengths and weaknesses of transport options - Sydney Q64

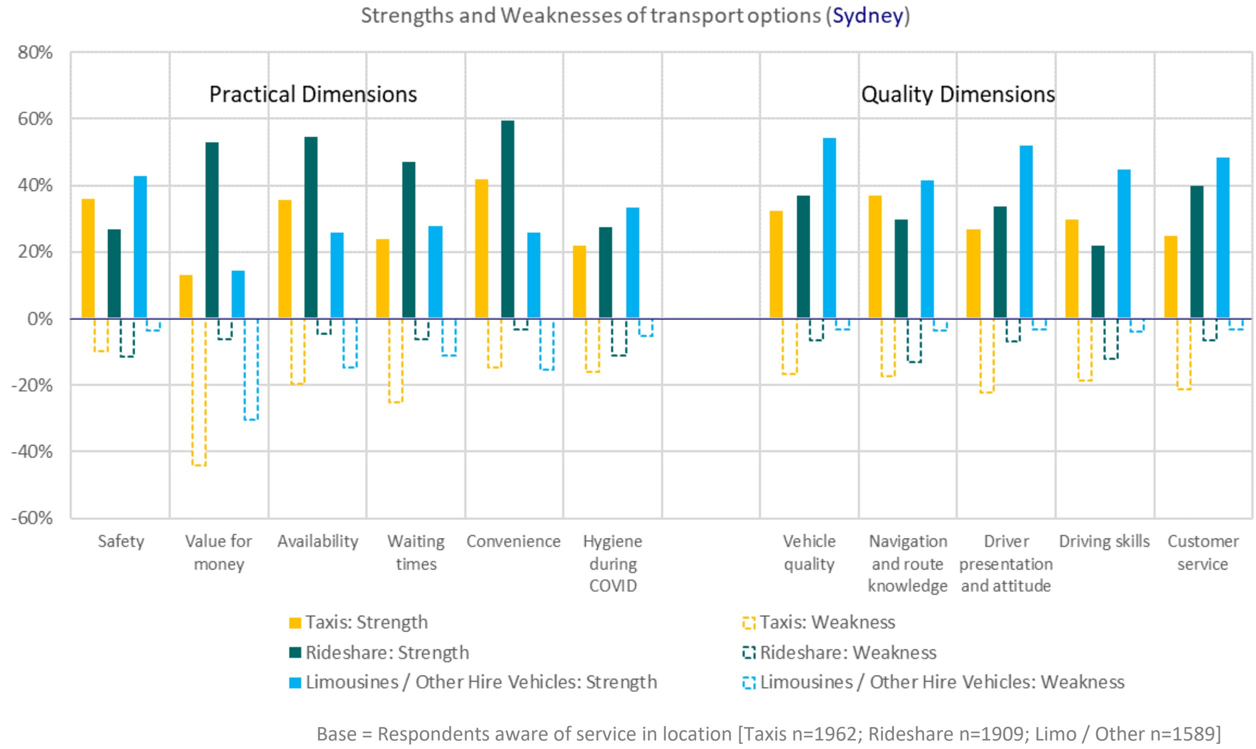


Figure 94: Detailed strengths and weaknesses of transport options - Other Urban Q64

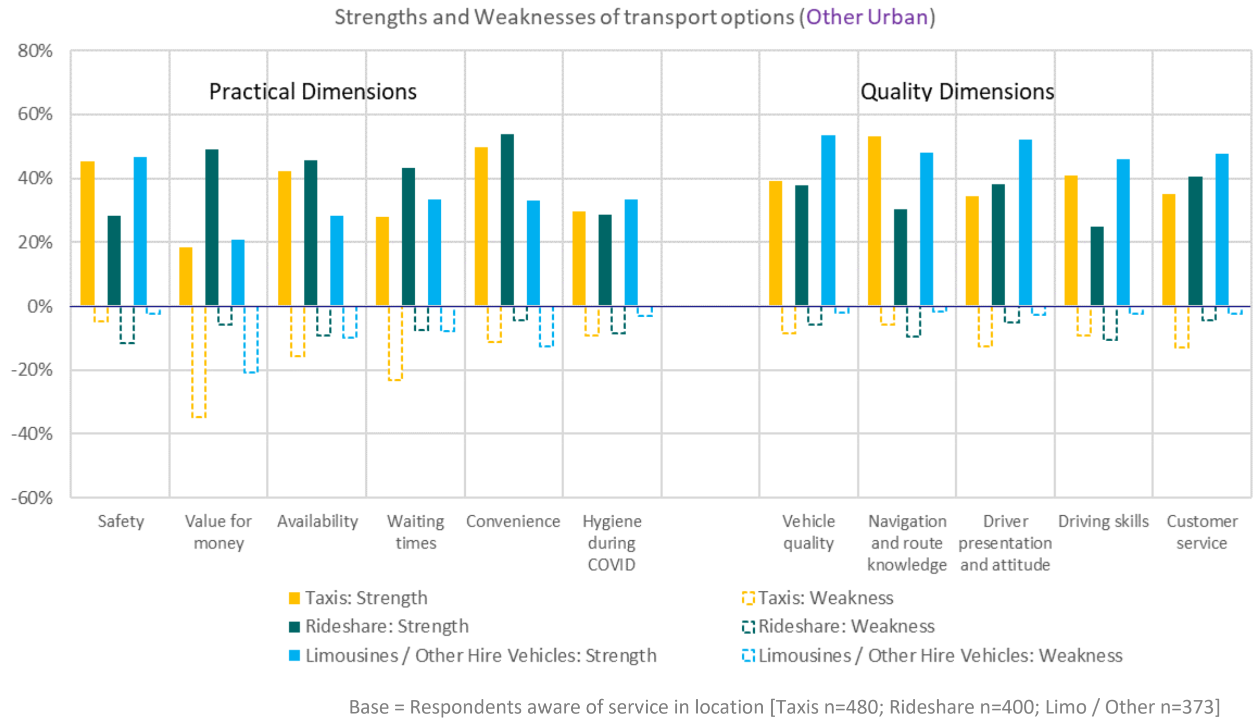
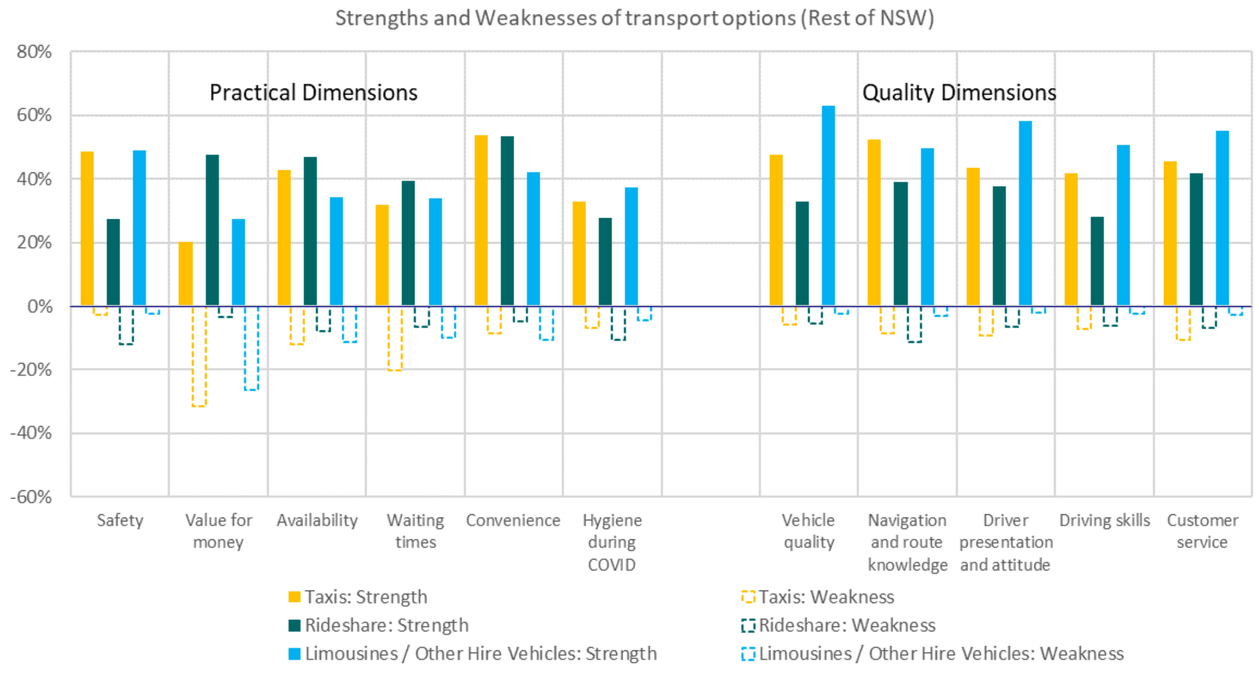


Figure 95: Strengths and weaknesses of transport options - Rest of NSW [Q64]



Base = Respondents aware of service in location [Taxis n=378; Rideshare n=191; Limo / Other n=203]

Appendix D: Demographic Comparisons

Demographic breakdowns for the 2020 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		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	97%	94%	78%	94%	82%	71%	91%	50%	48%

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		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	31%	44%	5%	23%	24%	4%	21%	12%	3%

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

Base = used in the last 6 months

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	weekly			*monthly*		
2017	13%	18%	16%	52%	69%	38%
2018	15%	20%	12%	51%	68%	35%
2019	15%	21%	14%	51%	66%	41%
2020	14%	19%	27%	50%	66%	48%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	weekly			*monthly*		
2017	11%	16%	5%	53%	65%	32%
2018	8%	13%	2%	42%	59%	25%
2019	9%	17%	9%	41%	62%	26%
2020	9%	20%	22%	39%	59%	61%

	Rest of NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	weekly			*monthly*		
2017	16%	19%	17%	48%	72%	33%
2018	5%	14%	0%	40%	62%	8%
2019	13%	13%	8%	53%	60%	58%
2020	10%	18%	18%	46%	49%	41%

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 (i.e.: % reported an increase in use minus the proportion who reported a decrease in use)

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	-45%	-18%	-42%	-34%	-21%	-42%	-28%	-21%	-39%

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
2017	54%	78%	49%	66%	42%	63%
2018	53%	78%	54%	66%	54%	74%
2019	54%	78%	53%	80%	53%	76%
2020	65%	84%	58%	79%	67%	77%

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		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	12%	12%	4%	10%	13%	4%	9%	16%	3%

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		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	74%	93%	89%	74%	92%	86%	86%	93%	100%

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

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	64%	50%	34%	52%	49%	24%	49%	45%	34%

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

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	53%	50%	41%	14%	4%	2%
2018	56%	59%	43%	15%	4%	1%
2019	60%	62%	40%	12%	5%	2%
2020	52%	65%	39%	13%	4%	2%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	55%	23%	39%	8%	4%	2%
2018	55%	38%	45%	11%	4%	2%
2019	58%	45%	43%	8%	4%	2%
2020	52%	47%	40%	10%	4%	2%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	54%	19%	25%	11%	6%	3%
2018	56%	25%	27%	8%	8%	4%
2019	61%	29%	30%	9%	11%	4%
2020	53%	24%	27%	9%	8%	2%

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					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	7%	33%	20%	5%	23%	48%
2018	6%	41%	18%	7%	26%	48%
2019	12%	41%	16%	16%	24%	45%
2020	7%	42%	12%	11%	23%	45%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	22%	28%	29%	28%	21%	53%
2018	16%	33%	24%	24%	24%	53%
2019	19%	37%	26%	25%	29%	53%
2020	19%	36%	22%	31%	27%	47%

	Rest of NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	23%	31%	22%	36%	23%	48%
2018	25%	34%	31%	36%	29%	54%
2019	25%	33%	25%	38%	24%	49%
2020	24%	36%	25%	38%	29%	53%

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%
2020	18%	36%	16%	25%	26%	20%	25%	13%	31%

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

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good			*Poor*		
2017	46%	61%	36%	43%	5%	17%
2018	49%	67%	34%	42%	6%	17%
2019	52%	54%	53%	38%	30%	28%
2020	44%	72%	33%	43%	7%	17%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good			*Poor*		
2017	50%	38%	40%	25%	3%	10%
2018	46%	50%	39%	31%	6%	13%
2019	54%	62%	42%	30%	5%	16%
2020	50%	60%	41%	27%	5%	10%

	Rest of NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good			*Poor*		
2017	46%	50%	33%	28%	6%	13%
2018	51%	56%	32%	27%	4%	13%
2019	53%	59%	38%	28%	7%	15%
2020	46%	53%	30%	30%	8%	19%

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

	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%
2020	10%	20%	18%	16%	6%	18%	21%	26%	16%	29%	24%	17%

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

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	30%	67%	2%	46%	52%	3%	64%	30%	5%

Figure 58: 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%	11%	24%	9%	9%	16%	38%	5%	7%
2020	10%	16%	11%	7%	17%	18%	6%	6%	22%	20%	-	-

Figure 63: 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%
2020	22%	27%	22%	14%	3%

	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%
2020	31%	3%	41%	13%	2%

	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%
2020	22%	2%	58%	0%	12%

Figure 65: 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%
2020	62%	92%	38%	8%	73%	87%	27%	13%	85%	93%	15%	7%

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

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	56%	49%	73%	82%	89%	82%
2018	55%	46%	78%	82%	88%	89%
2019	55%	49%	75%	82%	89%	85%
2020	52%	48%	51%	77%	84%	61%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	48%	32%	90%	81%	81%	95%
2018	53%	48%	84%	76%	88%	87%
2019	46%	42%	61%	81%	90%	78%
2020	52%	31%	89%	88%	74%	100%

	Rest of NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	39%	46%	63%	71%	81%	75%
2018	34%	38%	73%	71%	75%	81%
2019	40%	23%	43%	78%	81%	53%
2020	23%	31%	55%	68%	58%	67%

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

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%	88%	92%	87%	94%	92%	88%	90%	92%
2020	80%	89%	89%	94%	96%	91%	74%	87%	100%

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

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			*Less than $40*		
2017	25%	49%	3%	64%	83%	12%
2018	22%	43%	2%	54%	78%	4%
2019	24%	43%	8%	58%	75%	16%
2020	25%	50%	0%	62%	85%	0%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			*Less than $40*		
2017	53%	69%	6%	90%	89%	6%
2018	46%	49%	4%	83%	83%	4%
2019	43%	52%	7%	80%	84%	7%
2020	34%	56%	0%	75%	89%	0%

	Rest of NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			*Less than $40*		
2017	58%	59%	33%	86%	86%	50%
2018	50%	40%	7%	80%	73%	19%
2019	54%	53%	0%	82%	85%	19%
2020	55%	38%	17%	89%	86%	17%

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

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	61%	84%	90%	68%	91%	100%	56%	91%	100%

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

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	78%	93%	80%	94%	97%	91%	86%	90%	100%

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

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/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%
2020	-2%	14%	32%	5%	18%	69%	0%	21%	43%

Appendix F: Methodology check in 2017

Details of a small concurrent survey using the previous survey method in 2017, to calibrate the revised survey and methodology that has been used from 2017-2020.

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, the underlying paradigm remained. The addition of the subsequent 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 showed an apparent slowing of the growth of rideshare into the NSW market. In the 2019 report it was speculated that 2020 would reveal more of the relative shape of taxi and rideshare usage. The impact of COVID has interfered with the natural trajectories, but it is clear that in 2020 taxi use has declined far more sharply than did rideshare use.