Independent Pricing and Regulatory Tribunal of NSW

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 accreditation.

1. Executive Summary

Note on comparability to previous surveys: The 2017 survey was conducted using a mostly new survey that was developed to ensure directly comparable results between taxis and hire vehicles (categorised into Rideshare and Limousines / Other Hire Vehicles) on all measures. While the same broad sample structure was retained, a different online research panel was used to that in previous years. For both these reasons, results from the 2017 survey and previous surveys cannot be directly compared without the caveat of considering the possible impacts of these changes on data continuity. Examination of the trends with historical results shows that there are variations in the exact magnitude of some measures that are likely to be at least in part reflective of the changes in methodology – but that the overall trends and trajectories shown are consistent with the previous period of surveying. The full impact of the change of methodology should become more easily identified after further waves using the new questionnaire.

A small-scale measurement of usage levels in Sydney conducted at approximately the same time to provide a calibration reference point shows that the previous methodology would have generated usage estimates consistent with what has previously been seen – indicating no dramatic change in underlying behaviours.

Overview of key results

A new survey methodology which generates matched data for taxis and hire vehicles was introduced in 2017. Results of a small-scale study in Sydney run parallel to the main 2017 survey and using the previous methodology show that there has been no substantial discontinuity or change in the underlying level of use of taxis and hire vehicles. Reported taxi use remains consistent with previous measures, and use of hire vehicles (particularly rideshare) continues to increase. The new methodology uses a more nuanced multi-step process to measure awareness and use, and generates somewhat different estimates of usage. The small-scale replication of the previous method means we can be confident that real usage levels have not dramatically changed though.

The most obvious narrative in the 2017 results is a continuation of the trend of movement towards rideshare services and downwards pressure on the use of taxis. Taxis remain the most commonly preferred form of point-to-point transport, the most supported by workplace policies and preferences, and the most used. However, in all of these areas there is a sense that rideshare is becoming more widely used and preferred, and taxis relatively less so.

Respondents making more use of taxis were generally doing so because their primary need for transport had increased – whereas respondents making more use of rideshare primarily cited competitive advantages such as cost and responsiveness. Reduced fares were the single dominant factor that might increase taxi service usage, whereas a combination of price related factors and (especially outside of Sydney) service availability would be expected to increase rideshare use.

The primary point of difference is on perceived value for money. This is considered rideshares' biggest strength and taxis' biggest weakness. All indicators in the survey that relate to cost are strongly in favour of rideshare – including satisfaction with fares and the average fare paid for journeys of approximately the same length.

While rideshare is seen as particularly good for value, and users report greater satisfaction with waiting times, rideshares' relative weaknesses are perceived to be safety and driver skills.

Limousines and other hire vehicles are relatively little used compared to the other options. They are seen as having strengths in terms of quality dimensions and safety, but are more expensive. They tend to be used for considerably longer trips, and with much higher average fares.

Overall satisfaction with rideshare was considerably higher than with taxis, and the nett differential impact on likelihood of re-using the transport service was much higher for rideshare. Satisfaction and nett impact on likelihood were still somewhat positive for taxis, but not to anywhere near the extent as for rideshare.

Awareness of the regulatory changes affecting taxis and rideshare on 1 November 2017 was extremely low.

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. In recent years there have been 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.

For a number of years, commencing in 2012, IPART has conducted regular surveys of NSW residents on their experiences, as well as their reasons for using point-to-point transport options. This October 2017 survey will directly inform a current review of taxi fares across NSW and the number of taxi licences to be issued outside of Sydney from July 2018. It was also timed to be out of field just prior to changes to the regulation of taxis and other point-to-point transport services that came into effect on November 1.

With the changes to both options and regulations, the 2017 survey has taken the opportunity to substantially revise the questionnaire to better reflect the current and anticipated short-to-medium term landscape. In particular, it has taken the approach of having parallel questions for taxis, rideshare and 'limousines and other hire vehicles' in order to maximise the consistency and comparability of data across these different services.

Where possible, questions have retained consistency with previous questions in order to allow some ongoing tracking. However, the current survey was quite deliberately seen as the opportune time to update the questionnaire to best suit the current situation, and in most cases this was given priority over continuity. Throughout the report, the results from the different transport services are reported in parallel.

B. Research objectives

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

Specific objectives were to measure:

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

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

C. Methodology

The survey was administered online to a total of 3,002 NSW residents between 20 October and 30 October 2017. Three independent samples were obtained:

1. Sydney n=2048
2. Other Urban (Newcastle, Wollongong, Gosford and Wyong) n=501
3. Rest of NSW n=453

Interlocking age and gender quotas were applied at the time of data collection to match ABS population proportions. 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. No weighting was applied to the data for analysis due to its close alignment with the target profiles.

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.

The questionnaire was developed by ORIMA Research in collaboration with IPART. It 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. This was done partly to generate current data, and partly to generate baselines for future years.

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

The questionnaire took an average of 8.7 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.

The 2017 survey was conducted using a new questionnaire partially derived from that used in previous years, and although a similar sample structure was used to previous years, a different online panel was used. This means that comparisons to previous years' results should be made with caution. Apparent differences from the previous track to the 2017 results may be at least in part due to the methodological changes made, and further waves with the new methodology may be required before the full impact of the methodology change can be determined. Notes about specific comparative results are provided along with the comparative charts and tables.

3. Main Survey Findings

A. Local Transport Services

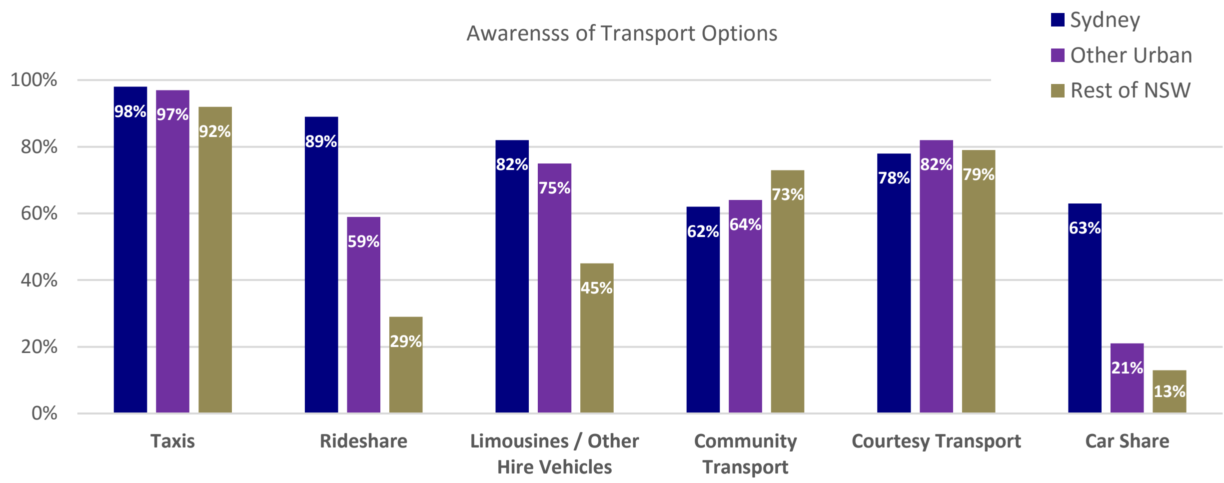
Awareness and Use

Unsurprisingly, awareness of transport options being available is more variable outside of Sydney.

Within Sydney, awareness of hire vehicles operating is only slightly lower than for taxis. In Other Urban awareness of Rideshare being available was considerably lower than in Sydney, but not much different for limousines and other hire vehicles. In the rest of NSW awareness of both categories of hire vehicles was much lower. [1]

Car Share was known of in their location by around two thirds of Sydney respondents, but no more than one-in-five outside of Sydney. Awareness of the availability of Courtesy Transport and Community Transport in their location were as high or higher outside of Sydney as within Sydney.

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



Base = all respondents [Sydney n=2048; Other Urban n=501; Rest of NSW n=453]

Usage of taxis was by far the most common of the different types of transport (see table below and charts on the following pages).

Figure 2: Usage of point-to-point transport services in the last 6 months among all respondents and among those aware of the service in their area Q6/9

Use in the last 6 months	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Used in last 6 months (Base = **all respondents**)	51%	35%	32%	36%	10%	8%	11%	8%	4%
Sample size	*2048*	*501*	*453*	*2048*	*501*	*453*	*2048*	*501*	*453*
Used in last 6 months (Base = **aware of service**)	52%	36%	35%	41%	17%	27%	14%	10%	9%
Sample size	*2009*	*487*	*146*	*1825*	*297*	*131*	*1686*	*374*	*202*

[1] Hire vehicles were introduced as follows: *There are several types of "**hire vehicle services**" that operate in NSW. Hire vehicle services provide a vehicle with a driver to transport you 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. Hire vehicle services **do not** include taxis, or rental cars that you can drive yourself.*

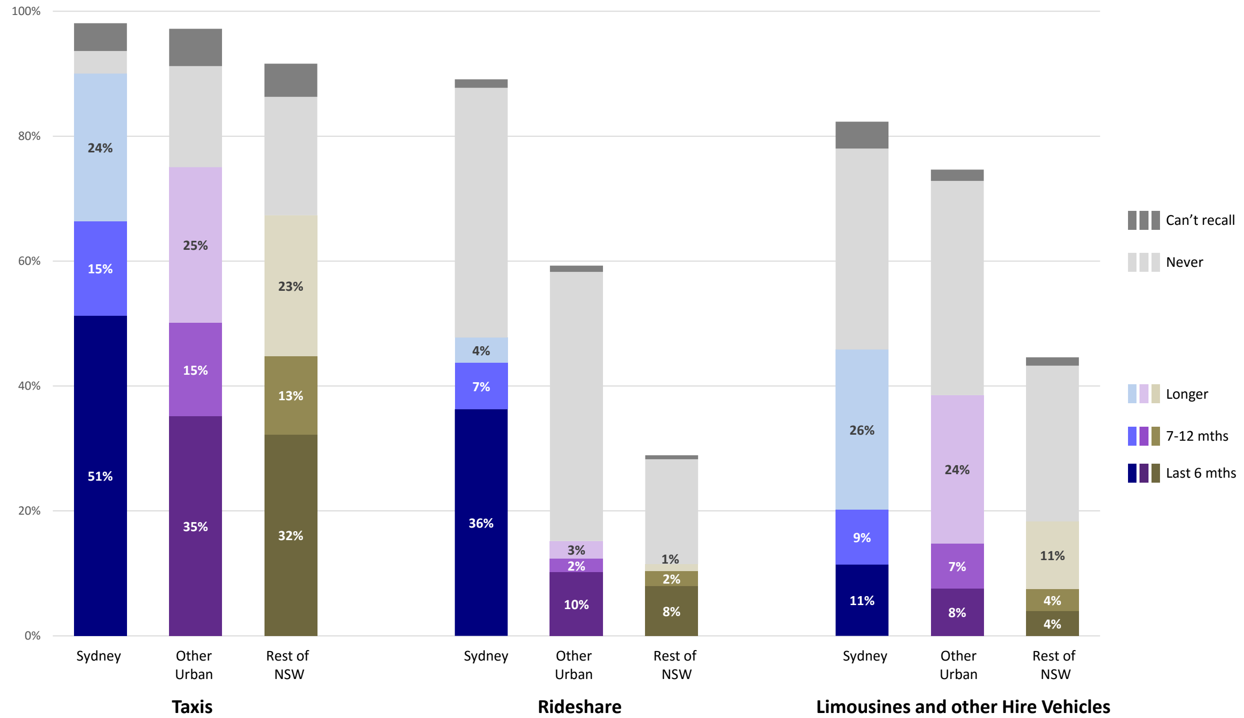
The pattern of relative usage across different transport options broadly matched relative awareness of availability. Usage of Community Transport was low compared to awareness, which is consistent with the restricted access to this particular service.

In previous surveys, usage of taxis, rideshare and car sharing was estimated from a one-step question asked of all respondents. This simply asked how often they had used the services in the last 6 months and included ‘not at all’ as an option which could be used by i) people unaware of the service in their location, ii) those who have never used the service, and iii) those who have used the service – but not in the last 6 months. In the revised survey, a multi-step process was introduced asking separately awareness of the service, and then how recently the service was last used only of those aware. Only those who indicated they were aware of the service *and* that their last use was within the last 6 months were asked the original question about how often transport had been used in the last 6 months.

This multi-step process provides greater clarity for respondents to report their frequency and recency of use more reliably. Each of the steps should more sensitively filter out respondents who were not even aware of the service, or who had last used it more than 6 months ago. Not unexpectedly, this more involved process does seem to produce slightly lower estimates of usage compared to the previous method. A small scale replication of the previous method was undertaken in Sydney to provide a calibration and verification of the two methods. This shows that the old methodology would have produced results consistent with previous observations, and suggests that although the new method produces slightly different estimate, underlying behaviour has not changed dramatically. It seems likely that in the older method a proportion of those respondents who had used transport options but outside the 6 month timeframe were recording a frequency that saw them counted as though they had used transport within that timeframe. See tracking charts in next section

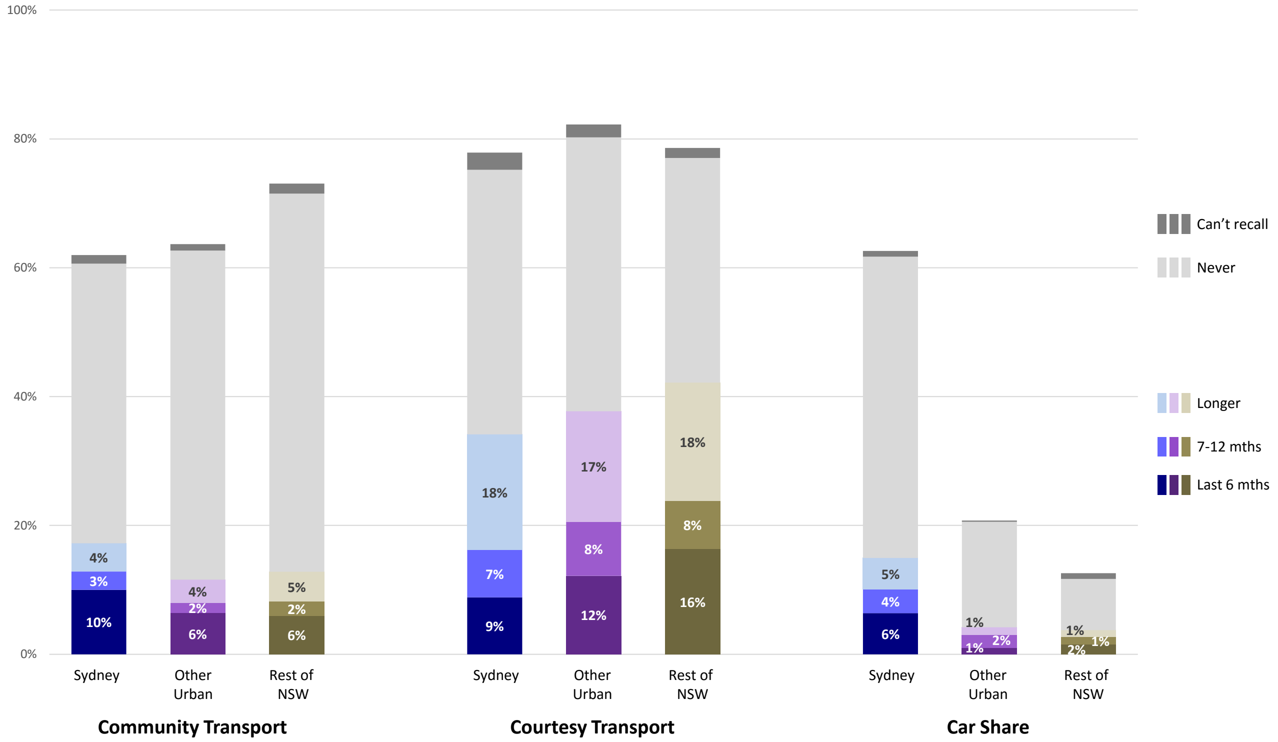
The new more involved method introduced in the November 2017 estimates that 51% of respondents in Sydney had used a taxi in the last 6 months, and 66% in the last 12 months. These figures were 35% and 50% in Other Urban, and 32% and 45% in the rest of NSW.

Figure 3: Breakdown of usage of point-to-point transport services among those aware of the service operating in their location Q6/9



Base = Aware of service in location [Sydney n=1686-2009; Other Urban n=297-487; Rest of NSW n=131-415]

Figure 4: Breakdown of usage of point-to-point transport services among those aware of the service operating in their location Q12



Base = Aware of service in location [Sydney n=1269-1595; Other Urban n=104-412; Rest of NSW n=57-356]

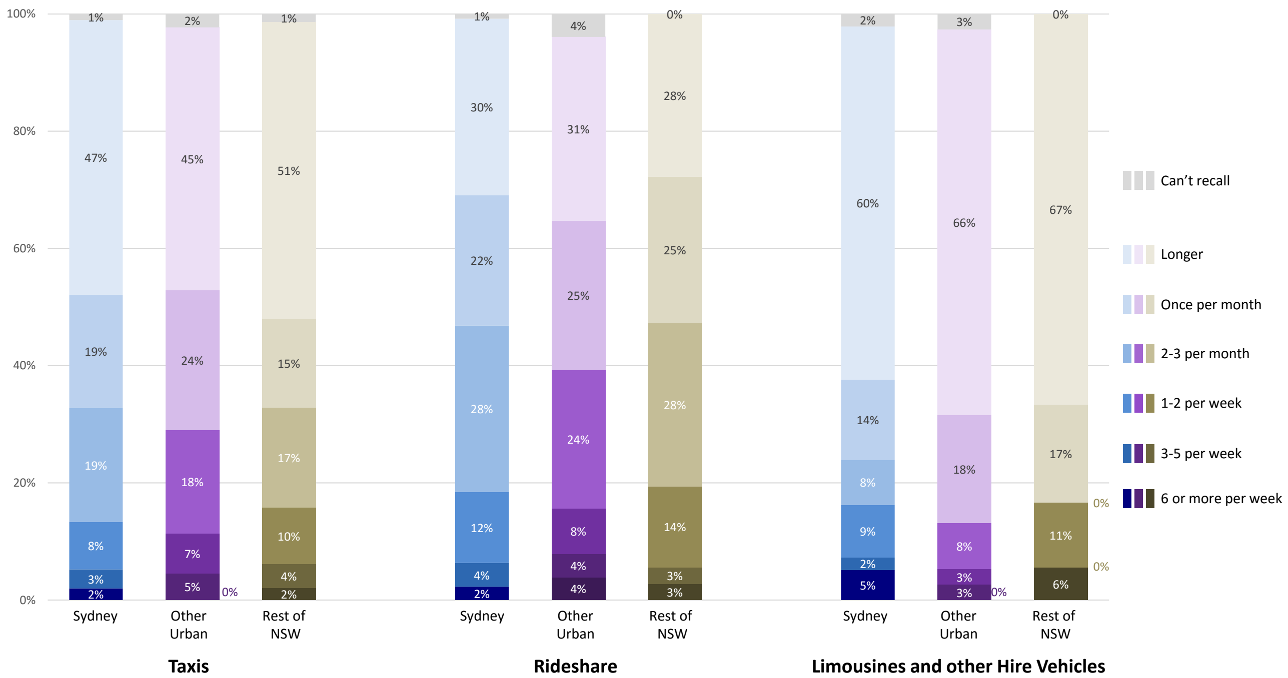
Frequency of Use

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

It suggests that in both Sydney and Other Urban people who use Rideshare services do so somewhat more frequently than do those who use Taxis. This pattern is not as evident in the rest of NSW, though the sample of people who used Rideshare in the last 6 months in this sample is very small, just 36 individuals.

Figure 5: Frequency of using point-to-point transport services among service users

Base = used in the last 6 months **Q13**



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

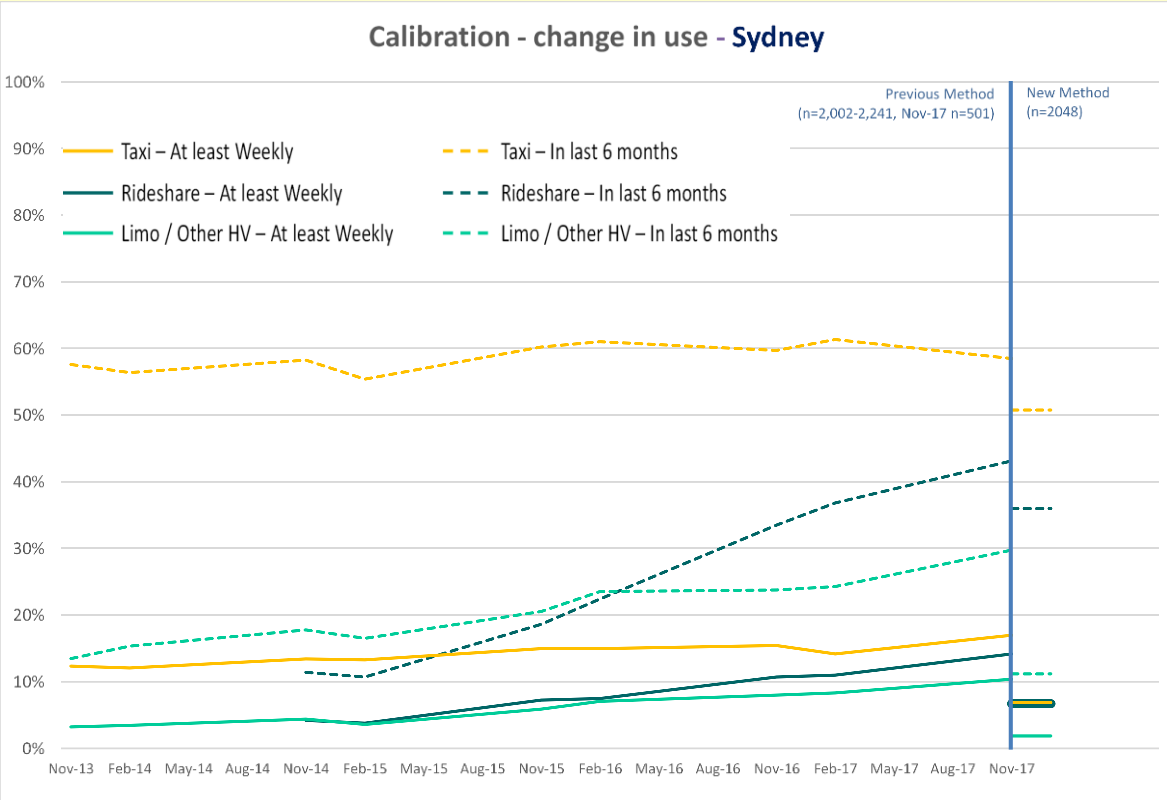
Frequency of use in the last 6 months	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
***Base** = used in the last 6 months*	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Proportion used in last 6 months	**51%**	**35%**	**32%**	**36%**	**10%**	**8%**	**11%**	**8%**	**4%**
Sample size	*1050*	*176*	*146*	*743*	*51*	*36*	*234*	*38*	*18*
6 or more times per week	2%	0%	2%	2%	4%	3%	5%	0%	6%
3-5 times per week	3%	5%	4%	4%	4%	3%	2%	3%	0%
1-2 times per week	8%	7%	10%	12%	8%	14%	9%	3%	11%
At least weekly	**13%**	**11%**	**16%**	**18%**	**16%**	**19%**	**16%**	**5%**	**17%**
2-3 times per month	19%	18%	17%	28%	24%	28%	8%	8%	0%
Once per month	19%	24%	15%	22%	25%	25%	14%	18%	17%
At least monthly	**52%**	**53%**	**48%**	**69%**	**65%**	**72%**	**38%**	**32%**	**33%**
Less often	47%	45%	51%	30%	31%	28%	60%	66%	67%
Can't recall	*1%*	*2%*	*1%*	*1%*	*4%*	*0%*	*2%*	*3%*	*0%*

Comparison to previous tracking

In previous surveys frequency of use was asked in a single one-step question where "not at all" was a response code for how often transport had been used in the last 6 months. This 'not at all' category should have been used by people i) unaware of the service at all, ii) who had never used it, and iii) who had used it, but just not in the last 6 months. In the new method developed in 2017 a three-step sequence was used asking first awareness of taxi services in the location, then whether they had been used in the last six months, and only then how frequently.

The estimates generated by this more nuanced three-step process are somewhat lower than the single question format previously used. In each case, the previous one-step question produced a fairly stable estimate of taxi usage that was in between these *last 6 months* and the *last 12 months* figures produced by the new methodology.

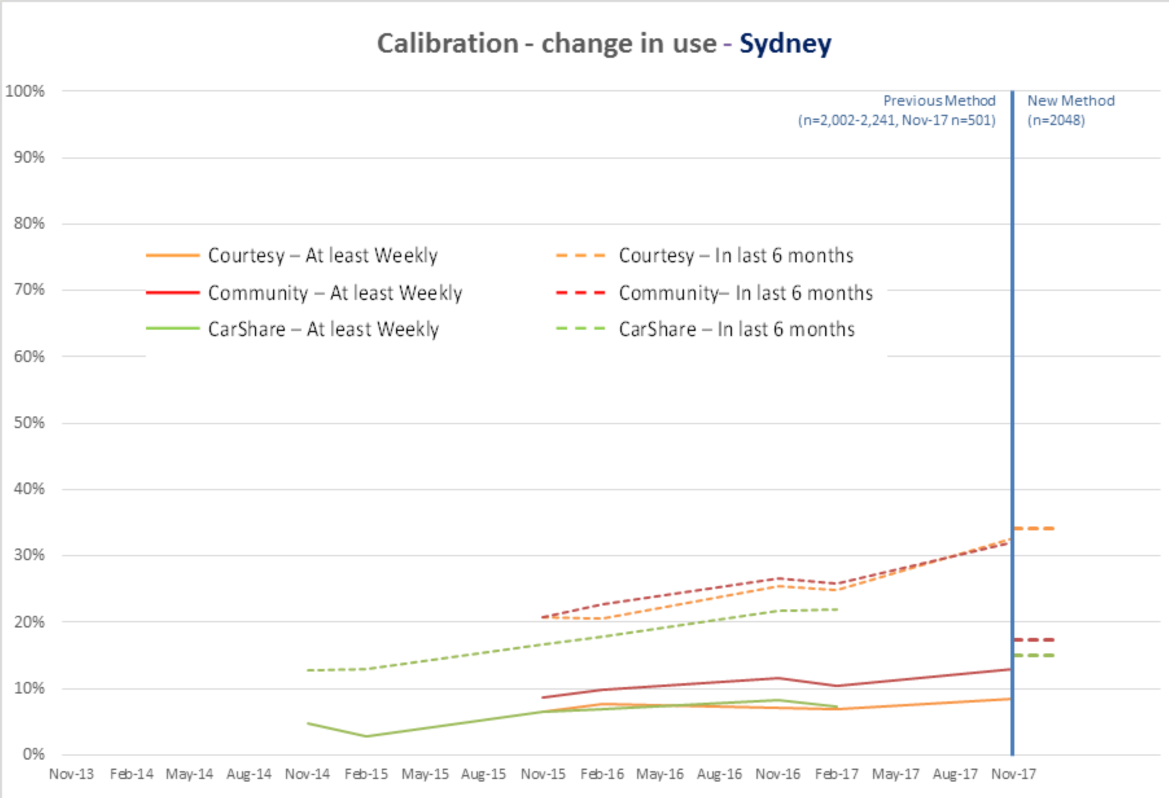
While the new method generates slightly different estimates, a small-scale replication of the previous method showed that it continues to generate results that are consistent with previous observations. The chart below shows the historical data series for Sydney. At November 2017 the results of the small-scale replication of the previous method are shown as the final point in the tracking, with all results consistent with precious trends. To the right of the blue line are shown the equivalent estimates from the new three-step process at approximately the same point in time.



This indicates there has not been a dramatic shift in actual behaviours, but rather that the new multi-step measurement process does get respondents to report their activity levels differently.

It is plausible that in the previous one-step process a proportion of respondents who knew they had used transport services but were unsure whether it was within the last 6 months or slightly longer ago were opting to answer in a way that counted them in the last 6 months, whereas the new method more clearly allows those respondents to classify themselves into the last 6 months or the 7-12 months categories. It's less clear why the proportion who report using transport options at least weekly under the new method would also be substantially lower (and the same pattern is visible at the monthly level), but again if respondents were not as rigorously applying the 6-month timeframe to their internal processing in the older one-step approach it is possible they may have had a consistent predilection to over-estimate rather than under-estimate their frequency of use by comparison to the newer multi-step method.

Reported use of community transport in Sydney showed a similar pattern to taxis and hire vehicles, though interesting both the old and new methods produced similar estimates for usage of courtesy transport in the last 6 months.



In conclusion:

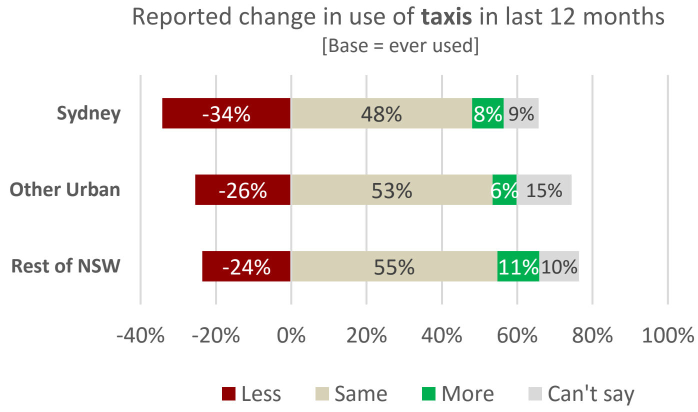
- The addition of the small-scale calibration sample in Sydney allows us to be fairly confident that underlying behaviour has not experienced a qualitative step-change in the last 12 months; and
- The new multi-step method for measuring awareness, use within the last 6 months, and frequency of use does seem to consistently yield somewhat lower estimates than the previous simple one-step process did (noting also that the differences in online panels being used could also affect the estimates generated).

Changes in Usage

Compared to the previous 12 months

Amongst people who have *ever* used various point to point transport services, there has been a reported decline in the use of taxis and of limousines and other hire vehicles in the last 12 months, and a reported increase in the use of rideshare.

Figure 6: Change in use of transport services in the last 12 months amongst those who have ever used transport services Q16

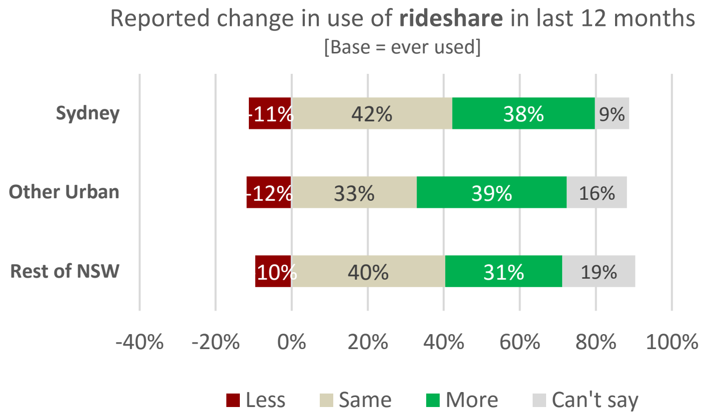


Base = Used in last 12 months [Sydney n=1844; Other Urban n=376; Rest of NSW n=305]

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

However was a **nett negative movement** in each location (ie: more users said they had used taxis less than said they had used them more).

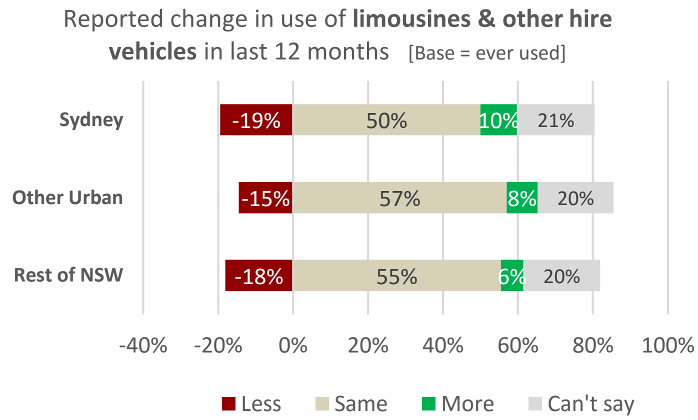
The nett change was -26% in Sydney, -19% in Other Urban, and -12% in the rest of NSW.



Base = Used in last 12 months [Sydney n=978; Other Urban n=76; Rest of NSW n=52]

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

The nett changes were +26% in Sydney, +28% in Other Urban, and +21% in the rest of NSW.



Base = Used in last 12 months [Sydney n=939; Other Urban n=193; Rest of NSW n=83]

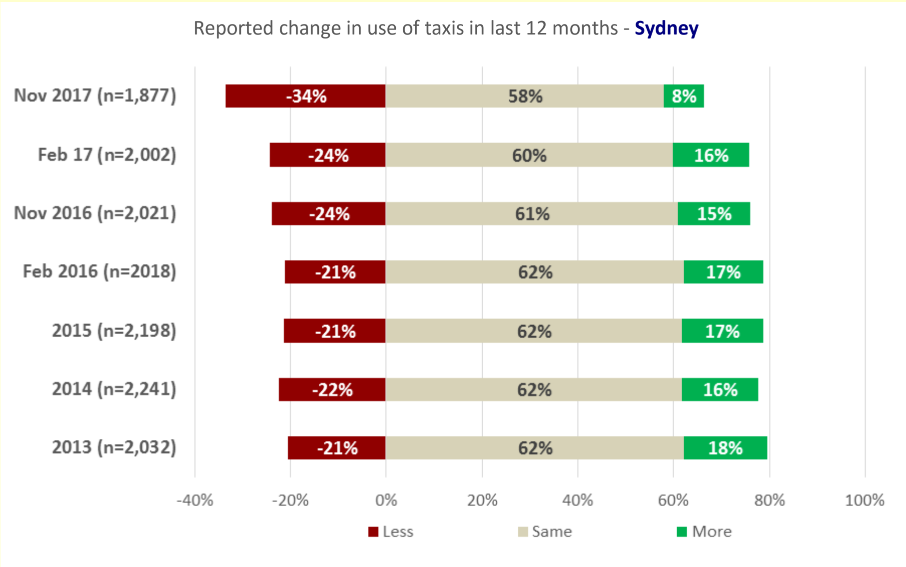
Like taxis, respondents who have ever used limousines or other hire vehicles also report a **nett negative** movement in the last 12 months (ie: they are doing so less often in the last 12 months).

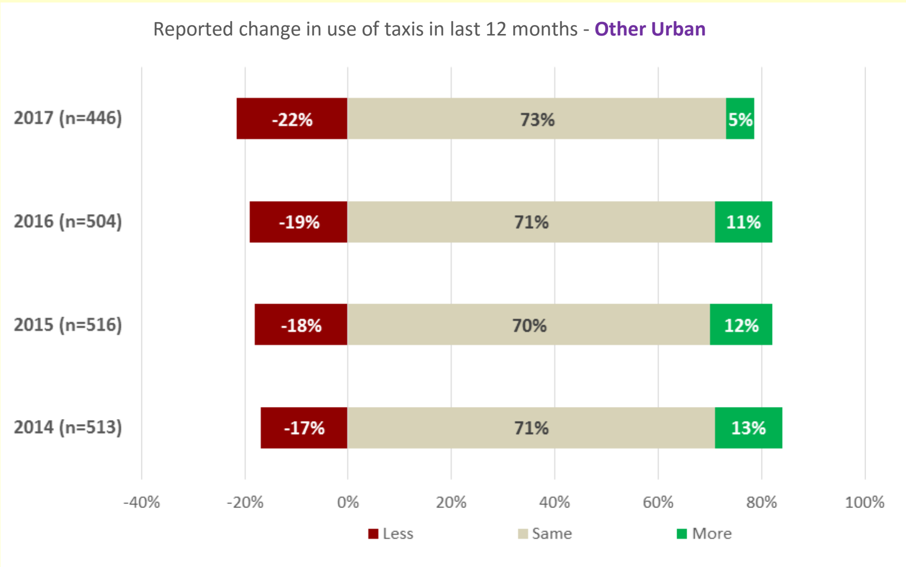
The nett changes were -10% in Sydney, -6% in Other Urban, and -12% in the rest of NSW.

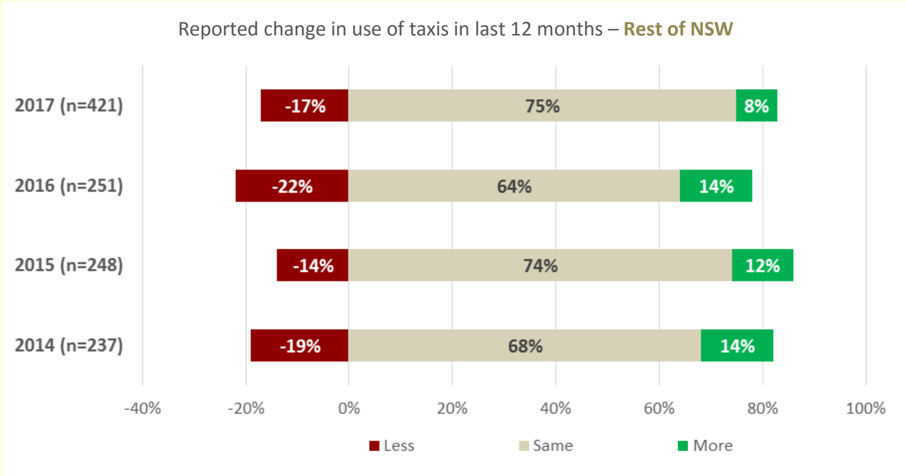
Comparison with previous years

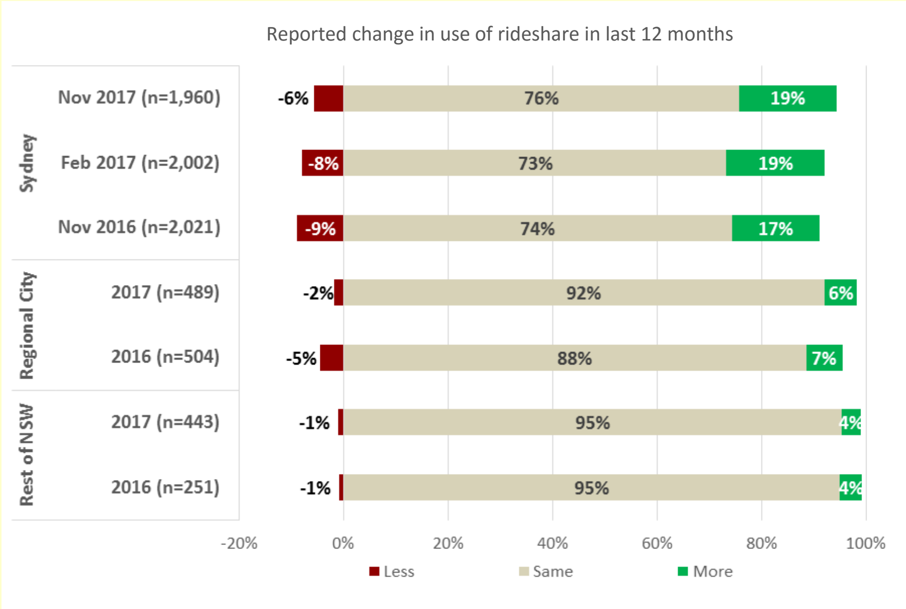
In previous years this question was asked regardless of whether or not people had ever used taxis. In 2017 this usage filter was applied. Presumably previously those who had not used taxis should have answered *same*. To make the 2017 results as comparable as possible to the previous results, those who were filtered out as not having ever used taxis in 2017 were added back in to the *same* category. In 2017 a 'can't say' response option was included. These respondents were excluded from the comparison charts to make the data as consistent as possible with the previous results.

At face value it appears that among people who have ever used taxis there is an increasing trend towards using them less. The magnitude of this appears substantially increased in 2017, but with the change of question format and filtering it would be prudent to wait for subsequent waves with the new survey before drawing firm conclusions about the level of acceleration. By comparison, the rate at which rideshare users are increasing their usage appears to be holding steady – though again, observing future waves with the new instrument will be important.






Reported change in use of taxis in last 12 months – Rest of NSW
2017 (n=421)
2016 (n=251)
2015 (n=248)
2014 (n=237)
-17%
75%
8%
-22%
64%
14%
-14%
74%
12%
-19%
68%
14%
-40%
-20%
0%
20%
40%
60%
80%
100%
Less
Same
More


Reported change in use of rideshare in last 12 months
Sydney
Nov 2017 (n=1,960)
Feb 2017 (n=2,002)
Nov 2016 (n=2,021)
Regional City
2017 (n=489)
2016 (n=504)
Rest of NSW
2017 (n=443)
2016 (n=251)
-6%
76%
19%
-8%
73%
19%
-9%
74%
17%
-2%
92%
6%
-5%
88%
7%
-1%
95%
4%
-1%
95%
4%
-20%
0%
20%
40%
60%
80%
100%
Less
Same
More

Reasons for changes in use

For respondents who have used taxis more in the last 12 months, the most commonly cited reason was higher primary need – literally going out more or needing to get around more.

By comparison, the reasons cited for using rideshare more often in the last 12 months were more to do with perceptions of competitive advantages – being less expensive than before, getting a fare estimate in advance, or shorter waiting times / less likely to not show up after being booked.

Patterns for limousines and other hire vehicles in Sydney (which was the only location with a sufficient sample size to consider) had a similar trend as rideshare, but not to anywhere near as clear an extent.

Figure 7: Reasons for using transport services more in the last 12 months Q18

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

Reasons why transport services have been used **more** in the last 12 months	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base *= used service more in the last 12 months*	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*156*	*24*	*34*	*367*	*30*	*16*	*92*	*16*	*5*
I find them **less expensive** than before	13%	17%	9%	**40%**	**40%**	**50%**	12%	**25%**	**40%**
I have **more disposable income**	14%	8%	9%	6%	10%	6%	8%	0%	0%
I'm **going out more** / needing to get around more	**28%**	**29%**	**38%**	**26%**	10%	**38%**	16%	13%	**40%**
Because I **don't have to wait as long to catch one**, or I think one is **more likely to turn up** after I've booked it	13%	13%	3%	**34%**	**27%**	**44%**	16%	13%	20%
I have **less access to alternatives**	12%	21%	21%	5%	13%	0%	7%	6%	20%
Because the **service for booking taxis over the phone has improved**	10%	13%	0%						
Because it has become **easier to book taxis with apps** than it was	13%	4%	0%						
Because the **service for booking is better than it used to be**				18%	13%	19%	5%	19%	20%
I think **drivers have become less inclined to take longer routes** or **overcharge** me	10%	4%	3%	8%	3%	19%	4%	0%	0%
Because I get a **fare estimate** quoted in advance				**32%**	**33%**	**38%**	18%	**25%**	**40%**
I have found that **driver behaviour and knowledge has improved** in LOCATION	13%	13%	0%	10%	7%	25%	8%	6%	**40%**
Because **they were not available previously** or I did not know about them before then	2%	0%	0%	13%	33%	6%	16%	**25%**	0%
For **another reason**	29%	33%	41%	10%	3%	6%	38%	25%	20%

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

Comparison to previous years

The comparison tables below should be broadly comparable from 2017 to the previous data.

In all three locations the most commonly and consistently cited reason for using taxis more continues to be about primary need – *I'm going out more* typically is mentioned by around a third of respondents using them more. *Having less access to alternatives* has also been commonly and consistently cited, but this has declined in Sydney in the last few surveys, particularly the current survey. In all three locations, a higher proportion of respondents indicated *for some other reason* than has been seen in the earlier surveys.

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 data filtered to match).

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

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

Bold figures show the top 3 responses for each survey

Reasons for using types of transport services *less* in the last 12 months were not quite the inverse of the reasons for using them more, but do tell a similar overall story.

Taxis are used less most commonly for cost reasons – feeling more expensive. In Sydney, replacement of taxis with rideshare is also clearly seen; while outside of Sydney declining primary demand due to better access to a car and going out less / less need to get around has reduced taxi usage for some respondents.

Relatively few respondents have declined in their use of rideshare, but where this had happened in Sydney (again, the only location with a sufficient sample to consider), this was due to less need to get around, or better public transport options.

In Sydney, respondents using limousines and other hire cars less tend to cite cost, less need to get around and increased use of rideshare as contributing factors most commonly.

Figure 8: Reasons for using transport services less in the last 12 months Q19

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

Reasons why transport services have been used **less** in the last 12 months	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
***Base** = used service less in the last 12 months*	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*632*	*96*	*72*	*110*	*9*	*5*	*183*	*28*	*15*
I find them **more expensive** than before	**46%**	**41%**	**43%**	15%	22%	20%	24%	**25%**	**27%**
I have **less disposable income**	12%	16%	17%	14%	**33%**	0%	14%	11%	20%
Because **peak or surge pricing** makes them too expensive	11%	20%	14%	13%	0%	20%	8%	7%	7%
I'm **going out less** / have less need to get around	18%	**25%**	**38%**	**25%**	11%	20%	21%	14%	**33%**
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	18%	13%	13%	6%	0%	0%	4%	0%	7%
I have **better access to a car**	22%	**31%**	**26%**	23%	11%	0%	16%	**32%**	20%
Public transport has improved when I need it	24%	13%	6%	**25%**	0%	0%	13%	7%	0%
I **use taxis** instead				14%	0%	0%	14%	0%	7%
I **use limousine or other hire vehicle services** instead	4%	7%	3%	5%	11%	20%			
I **use rideshare** services instead	**37%**	17%	14%				19%	18%	0%
I **use car share, community transport or courtesy buses** instead	5%	5%	1%	5%	11%	0%	4%	0%	0%
Because **booking services have become worse**	7%	10%	7%	5%	0%	20%	3%	0%	0%
I think **drivers have become more inclined to take longer routes** or **overcharge** me	18%	13%	7%	5%	0%	0%	3%	0%	7%
I have found that **driver behaviour and knowledge has become worse** in LOCATION	23%	14%	6%	7%	0%	0%	2%	4%	0%
For **another reason**	10%	14%	13%	11%	22%	20%	16%	21%	27%

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

Comparison to previous years

The comparison tables below should be broadly comparable from 2017 to the previous data.

In Sydney, compared to previous surveys respondents in the 2017 wave were more likely to indicate *increasing use of rideshare* (now the most common reason) and *driver behaviour / knowledge* as reasons for using taxis less, and less likely to cite *going out less often* or *finding them more expensive* (though when combined with the new *peak / surge pricing* response option the total combined 'expensive' proportion stays fairly constant). In Other Urban areas those who used taxis less were more likely to cite *expense-related reasons* and the *use of rideshare* than in previous surveys; but were less likely to say they *were going out less*.

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 data filtered to match).

Why have you used taxis to get around less?

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

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

Bold figures show the top 3 responses for each survey

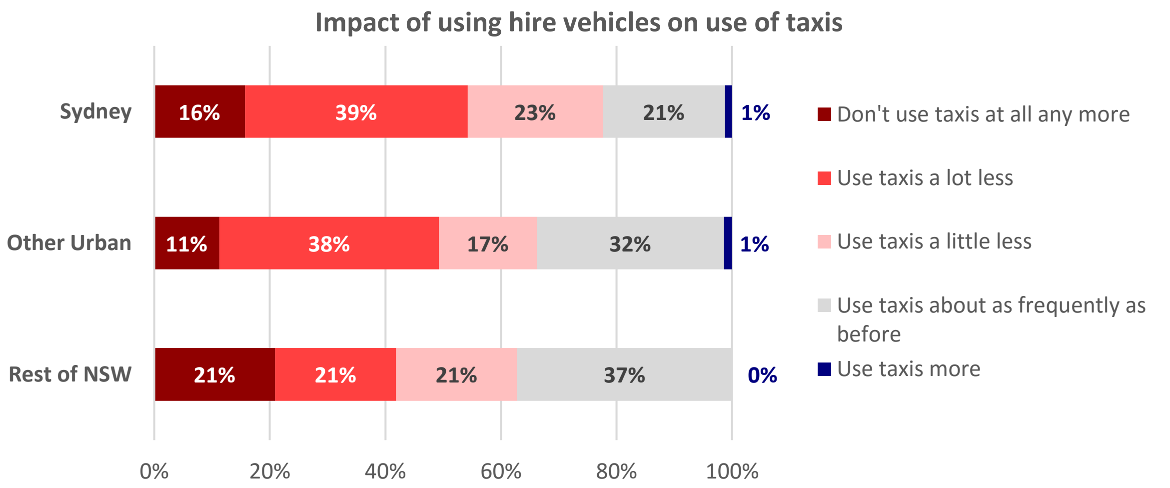
ORIMA RESEARCH

Impact of using hire vehicles in the last 6 months

Given the nett decline in the use of taxis and the nett increase in the use of Rideshare, it is not surprising that the impact of hire vehicles[2] 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.

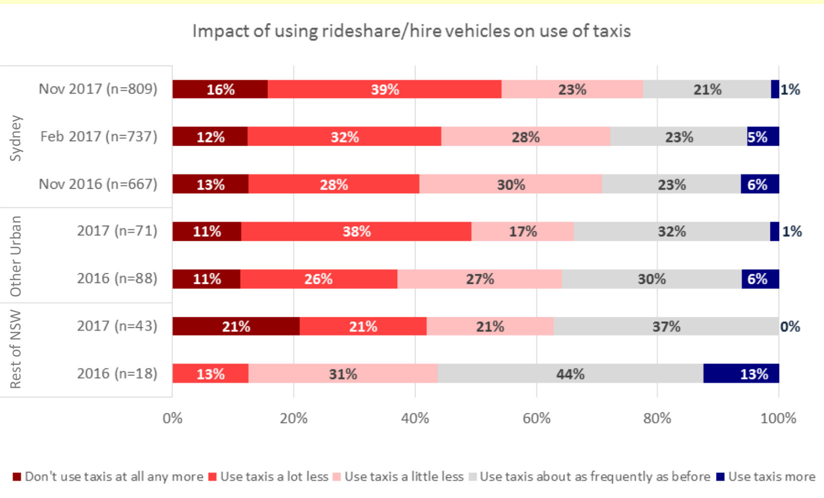
It shows that across the three locations between 11% and 21% now no longer use taxis at all, and that between 63% and 78% report some level of decline in their taxi usage *as a results of* using hire vehicles. Even though the base sizes are much smaller outside of Sydney, a fairly consistent pattern is observed in each location amongst this subgroup of the respondents, albeit the magnitude of the decline in taxi use may be slightly smaller.

Figure 9: 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=809; Other Urban n=71; Rest of NSW n=43]

Comparison to previous years



In 2017 this question was only asked of people who had both used rideshare in the last 6 months and ever used taxis. Previously it was asked regardless of ever having used taxis, which was offered as a response option.

For this comparison the previous results have been updated to match the 2017 results by excluding those who selected 'never used taxis'.

The current results show a steady continuation of the observed trend for rideshare users to increasingly report that they have reduced their taxi usage.

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

Problems

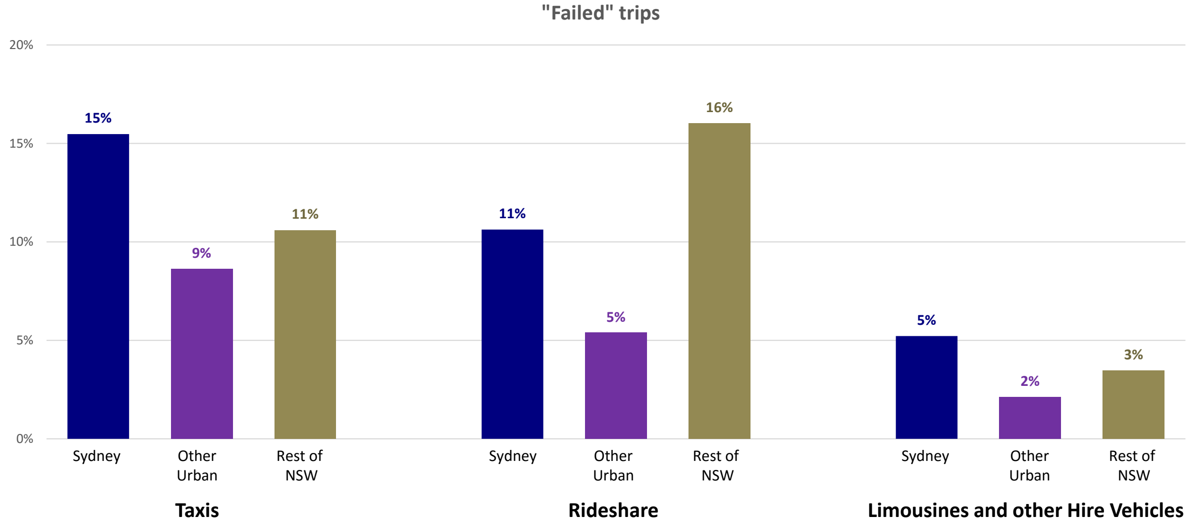
Failed Trips

Small but noticeable minorities of respondents in each location had had 'failed' trips within the last 6 months, where they had tried to use forms of transport and not been able to.

In Sydney and Other Urban this was most likely to have happened for taxis (15% and 11% of all respondents aware of the existence of the services respectively).

In the rest of NSW this was more likely to have happened for rideshare services (16%, noting that the base here is being aware of the service operating in their location). 11% also reported having a failed experience with taxis.

Figure 10: 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=1686-2009; Other Urban n=297-487; Rest of NSW n=131-415]

% experienced a failed trip in last 6 months	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
% of those aware of service in location	15%	9%	11%	11%	5%	16%	5%	2%	3%
Sample size	*2009*	*487*	*415*	*1825*	*297*	*131*	*1686*	*374*	*202*
% of all respondents	15%	8%	10%	9%	3%	5%	4%	2%	2%
Sample size	*2048*	*501*	*453*	*2048*	*501*	*453*	*2048*	*501*	*453*

When based against the total respondent group (bottom row of table above), it is clear that failed trip experiences are more common for taxis than either other type of transport service – which reflects the lower awareness / penetration of those hire vehicle services outside of Sydney.

Outcome of last attempt

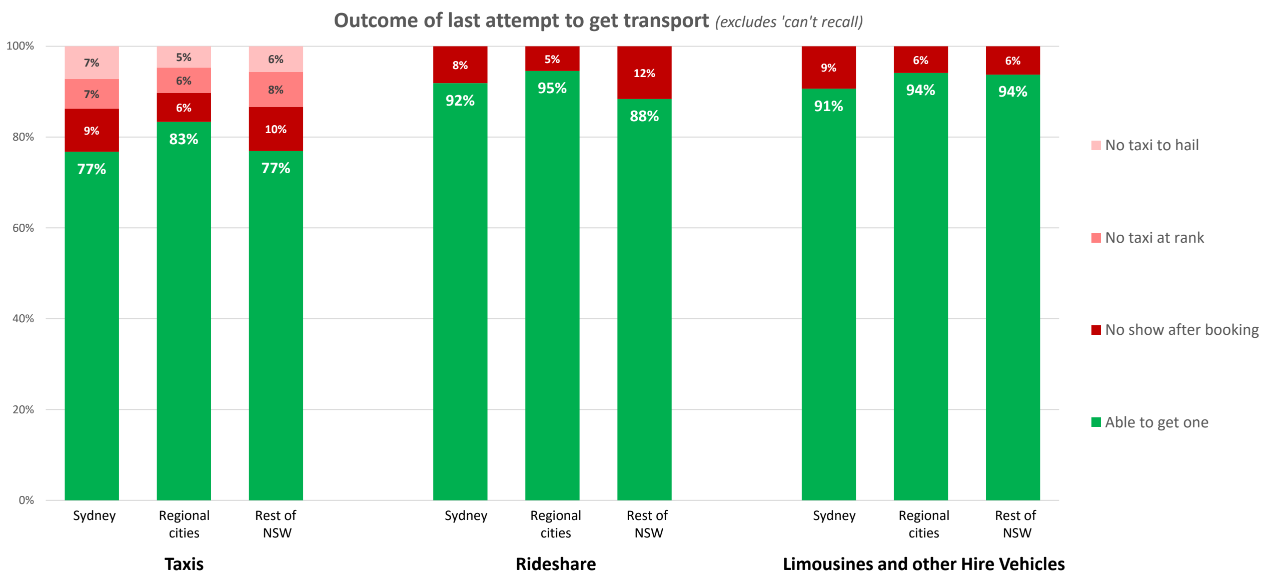
On the very last occasion respondents tried to use point-to-point transport, the majority were successful. However, small minorities did experience difficulties in getting transport.

Taxis had the lowest success rate, ranging from 77% to 83% across locations. The proportions who reported failing to get a taxi by rank, hail and booking were approximately equal.

The success rate for rideshare was higher at 88%-95%, and for limousines and other hire vehicles it was 91%-94%.

However, beyond the 'extra' ways that taxis can have difficulties (ie: rank and hail), the failure rates for vehicles not turning up after a booking was made were approximately the same between taxis (6%-10%) and hire vehicles (5%-12% across both categories).

Figure 11: 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=353-1244; Other Urban n=55-234; Rest of NSW n=32-195]

Actions when unable to get transport

When unable to obtain point-to-point transport, few respondents ultimately do not make the intended trip at all (9%-16% from those sub-samples with sufficient examples to interpret with any degree of surety). Respondents could indicate multiple alternatives were used when they could not get their desired point-to-point transport option.

In Sydney a wide variety of alternative solutions appear available. Public transport (trains, regular buses) was used as at least part of the solution on around half of the last occasions that point-to-point transport was unable to provide a service; while around a third included some form of 'self-transport' (such as driving, walking, cycling). Limousines and other hire vehicles were rarely used as a substitute, but rideshare and taxis were also fairly widely used as a substitute for the other.

Outside of Sydney only taxis had a sufficient sample size to meaningfully consider. Slightly fewer multiple or combination solutions were indicated (seen in fewer total responses across all options). In Other Urban, public transport and self-transport were the two primary solutions used, while in the rest of NSW self-transport was by far the most common solution.

Figure 12: Actions taken when unable to get point-to-point transport Q15/31

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

Actions taken when last unable to get point-to-point transport *Multiple responses allowed, so columns add to more than 100%*	When last unable to get a **taxi**			When last unable to get a **rideshare service**			When last unable to get a **limousines** or **other hire vehicle**		
Base: Combined responses from <u>any</u> failed attempt in last 12 months (Q14/15) OR if last attempt was unsuccessful (q30/31)	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*458*	*59*	*67*	*224*	*18**	*23**	*105*	*11**	*7**
Used a **taxi** instead				**42%**	**33%**	**30%**	**22%**	**27%**	**29%**
Took a **train**	**34%**	**24%**	10%	**28%**	**33%**	13%	**27%**	**27%**	14%
Used a **rideshare** service instead	**28%**	15%	12%				15%	18%	**29%**
Took a regular **bus**	**23%**	**22%**	7%	**23%**	17%	4%	18%	18%	**29%**
Drove myself or got a **lift**	**22%**	**24%**	**30%**	18%	11%	43%	**20%**	**27%**	**43%**
Decided **not to make the journey** at all	16%	10%	13%	13%	11%	13%	9%	18%	14%
Walked or **cycled**	15%	**27%**	**27%**	**20%**	11%	9%	14%	18%	14%
Used **community transport**	9%	7%	6%	11%	6%	17%	15%	0%	0%
Used a **limousine** or **other hire vehicle**	8%	7%	6%	10%	0%	13%			
Used a **car sharing** service	7%	7%	3%	8%	0%	0%	9%	0%	0%
Used **courtesy transport**	6%	5%	1%	10%	0%	13%	10%	9%	14%
Something else	9%	7%	15%	8%	17%	4%	8%	9%	14%
Can't recall	6%	10%	9%	11%	11%	13%	20%	18%	29%

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

Comparison to previous years

The comparison tables below should be broadly comparable from 2017 to the previous data.

1-in-5 of the respondents who had been unable to get a taxi in Sydney or from the Rest of NSW sample did not make the trip at all on the last occasion that happened, as did slightly fewer from the Other Urban area. This figure is higher than previously reported in Sydney. In Sydney *trains*, *buses* and *private vehicles* remain common alternatives – but using *rideshare* instead is growing. Outside of Sydney public transport alternatives are less commonly used, while *walking / cycling* is more commonly reported.

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

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

Sydney

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

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

Bold figures show the top 3 responses in each survey

ORIMA RESEARCH

Problems Experienced

Respondents in Sydney reported a higher level of problems than did those in other urban or the rest of NSW, particularly with respect to taxis. Only 38% of Sydney taxi users did not report at least one problem experienced in the last 12 months, compared to 55%-60% in the other locations.

In all three locations taxis had the highest level of problems of the three types of transport services, and limousines and other hire vehicles the lowest – though outside of Sydney the difference between taxis and rideshare was very minimal.

The relative patterns of problems were fairly consistent across the three locations, and also across the different types of transport. The one exception to this was the relatively higher rate of dissatisfaction with surge pricing for rideshare, which was the single biggest area of concern for that type of transport. Beyond that, availability, route knowledge and choices, and pricing were the primary areas identified.

Very few respondents spontaneously identified serious inappropriate or illegal actions.

Figure 13: Problems experienced using point-to-point transport amongst users Q28/29

NOTE: Small bases sizes for Other Urban and Rest of NSW.

Problems experienced using point-to-point transport *Multiple responses allowed, so columns add to more than 100%*	Using **Taxis**			Using **Rideshare services**			Using **Limousines or other hire vehicle services**		
Base: Used the type of transport in the last 12 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*1359*	*251*	*203*	*895*	*62*	*47*	*413*	*74*	*34*
Had no problems	**38%**	**60%**	**55%**	**53%**	**66%**	**60%**	**75%**	**85%**	**82%**
Couldn't get one when wanted	**27%**	**18%**	**21%**	12%	11%	9%	5%	3%	6%
Driver **not know where going**	**26%**	12%	12%	13%	10%	**17%**	4%	1%	0%
Not most direct route	**26%**	**15%**	**20%**	13%	5%	11%	7%	3%	6%
Overcharged	**16%**	10%	11%	7%	3%	13%	7%	4%	3%
Price (during peak or surge)	**16%**	11%	14%	**20%**	11%	11%	7%	0%	6%
Driver **rude, unhelpful, or offensive**	14%	8%	7%	6%	2%	6%	4%	3%	0%
Unsafe (driving, breaking road rules)	11%	6%	5%	5%	5%	6%	2%	3%	3%
Driver **refused destination**	9%	2%	4%	1%	2%	2%	0.5%	0%	0%
Driver or vehicle **condition / presentation**	3%	2%	0.5%	0.3%	0%	0%	0%	0%	0%
Did not show	0.4%	1%	1%	1%	0%	0%	0%	0%	0%
Something else	0.4%	1%	0%	1%	2%	0%	0%	1%	0%
Inappropriate or **illegal** actions (fraud, harassment etc)	0.2%	0.4%	0%	0.1%	0%	0%	0%	0%	0%

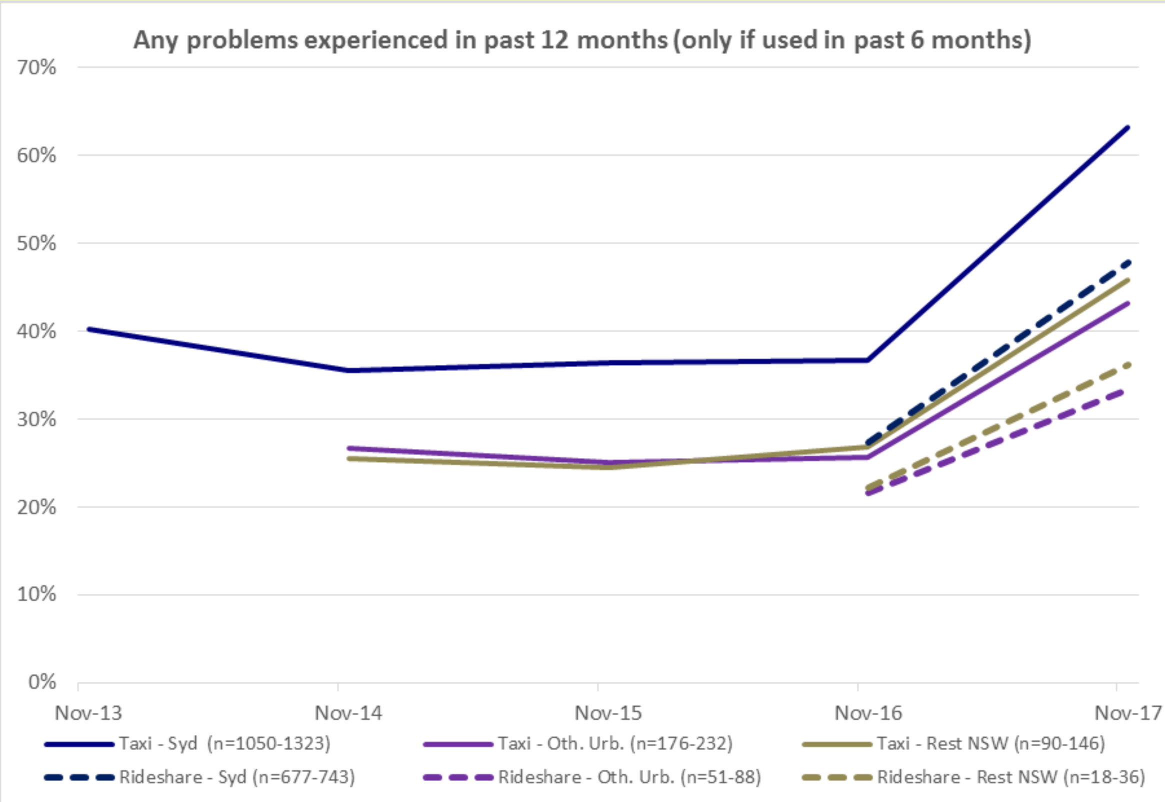
Bold figures = 15%+ of respondent group. Most "something else" responses were back-coded into existing categories.
Note small base sizes in some cases.

Comparison to previous years

The proportions of respondents who reported experiencing 'any problem' in 2017 have all increased. This likely reflects a change in the way this question was asked from the previous survey.

Previously, respondents were asked whether they had experienced any problems, and only shown the list of potential problems if they answered 'yes'. In the new survey, respondents are shown the list of problems and asked which, if any, have they experienced – with *none* as an option to select at the bottom of the list. This type of prompted list would tend to increase the likelihood of respondents reporting an issue, as it takes them through a range of specific experiences they might have had rather asking more generally whether they can recall having had a moment when they had a problem. Both the ability of the list to remind them of an experience, and the way the list provides greater clarity over what constitutes a problem would be expected to impact on likely response patterns.

Therefore, the apparent increase in problems shown in the chart below should be interpreted with caution, and further waves of the new survey will need to be observed before we can determine whether their prevalence is changing.

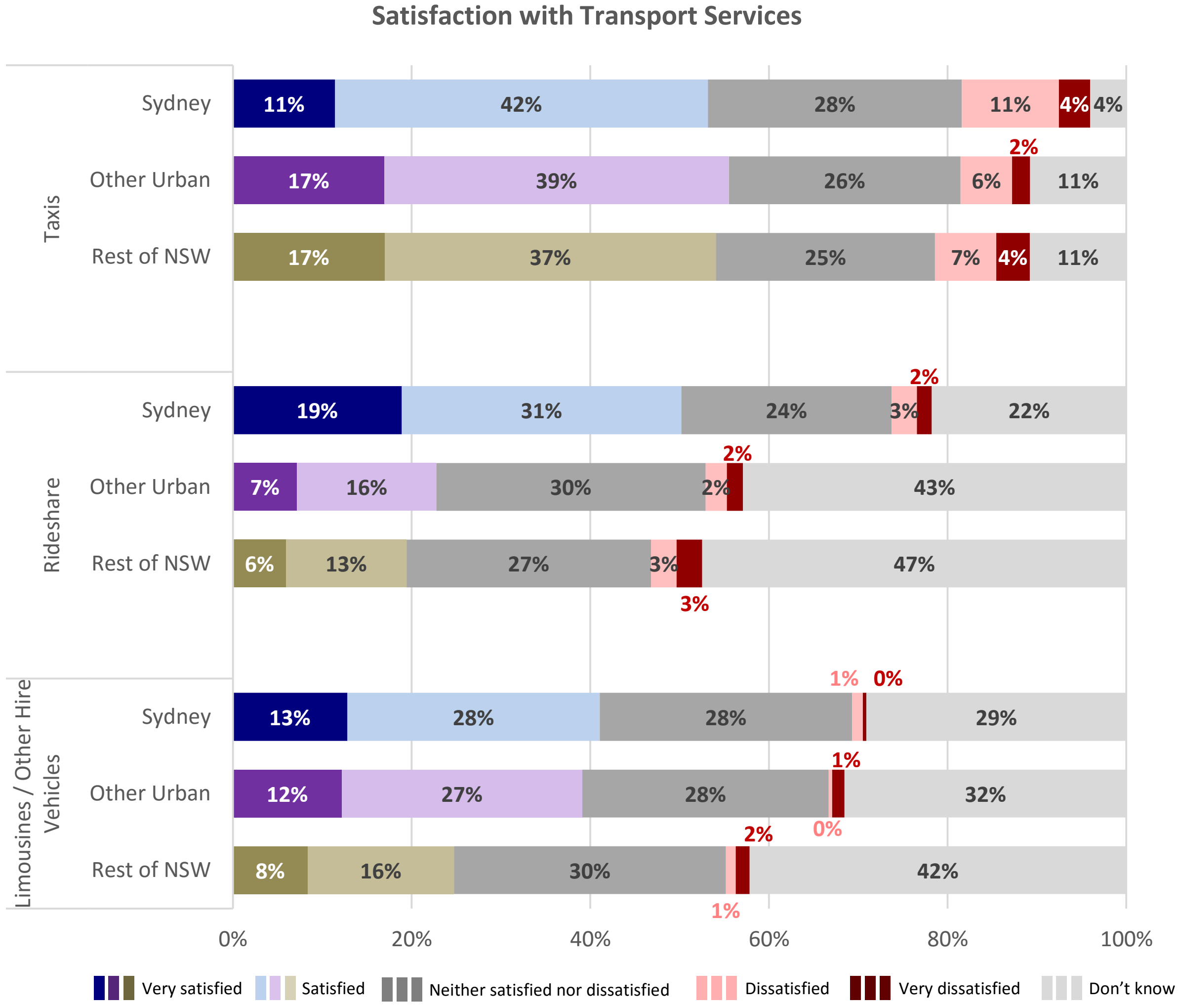


Satisfaction with Services

Satisfaction with the available taxi services is moderate and approximately equivalent across Sydney, Other Urban and the rest of NSW. However, satisfaction with rideshare is lower outside Sydney, and satisfaction with limousine and other hire vehicle services is lower amongst respondents from the rest of NSW.

Taxis have the highest proportion of respondents who say they are actively 'dissatisfied' with the service available to them, across all locations.

Figure 14: Satisfaction with point-to-point transport services Q7/10



	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Satisfied	53%	55%	54%	50%	23%	19%	41%	39%	25%
Dissatisfied	14%	8%	11%	4%	4%	6%	2%	2%	3%
Differential *	+39%	+48%	+43%	+46%	+19%	+14%	+39%	+37%	+22%

Base = All respondents [Sydney n=2048; Other Urban n=501; Rest of NSW n=453]

* 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*

B. Perceptions of Point-to-Point Transport Options

Strengths and Weaknesses

Ten dimensions were included in the survey, which could be thought of as falling into two broad groups:

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

Respondents were asked to rate each dimension as a 'strength', a 'weakness' or a 'neutral characteristics of each type of transport.

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

There are broad consistencies in the way that taxis, rideshare and limousines / other hire vehicles are perceived across the three survey locations, but also some nuanced differences.

The key consistencies seen are:

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

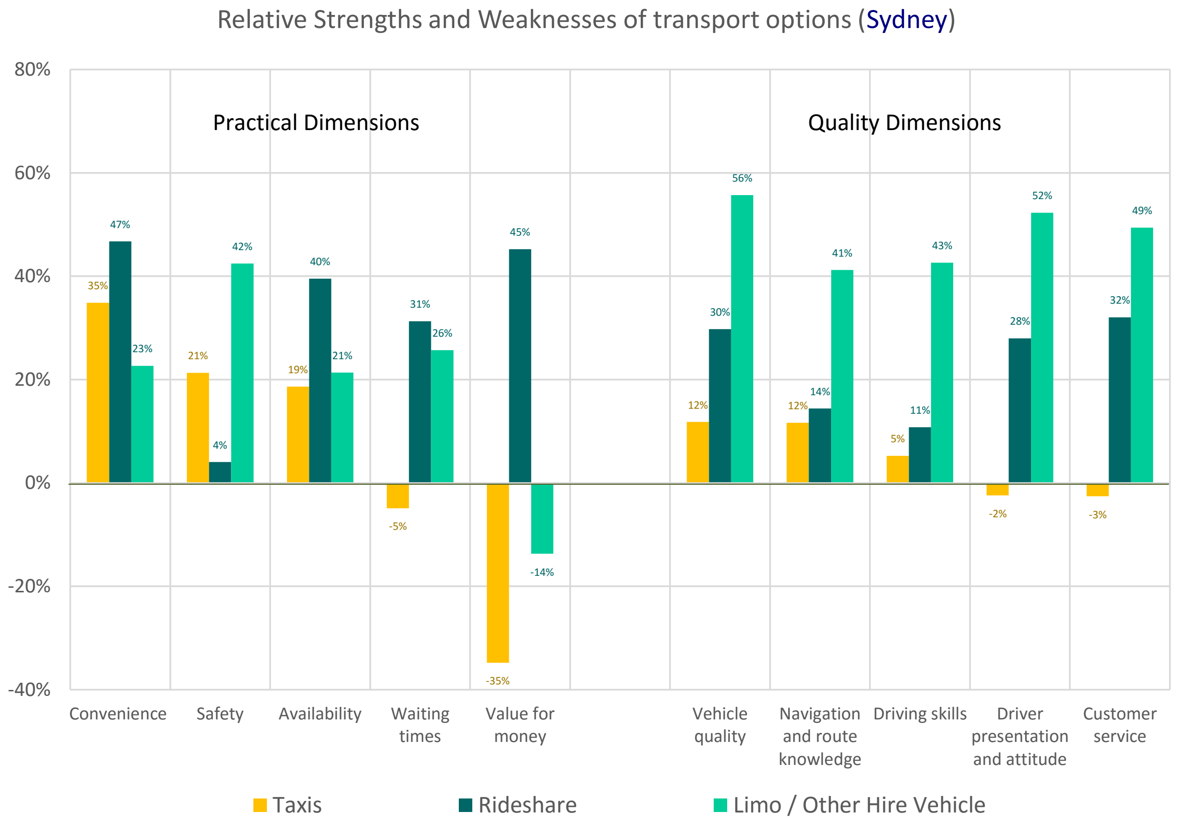
Variations across the locations are described on the following pages. See appendix C for detailed charts showing strengths and weaknesses ratings.

In Sydney, taxis had the lowest differential scores for every quality dimension, and all bar *convenience* and *safety* of the practical dimensions. For four dimensions – *waiting times*, *value for money*, *driver presentation and attitude* and *customer service* – taxis actually had negative differentials (ie: more respondents rated them as weaknesses than as strengths).

Rideshare has a clear positive differentiation on *value*, but also came out ahead on *convenience*, *availability* and *waiting times.*

Limousines and other hire vehicles have a clear and strong position on the 'quality' dimensions, plus *safety*.

Figure 15: Strengths and weaknesses of transport options amongst those aware of the service in their region - Sydney Q64



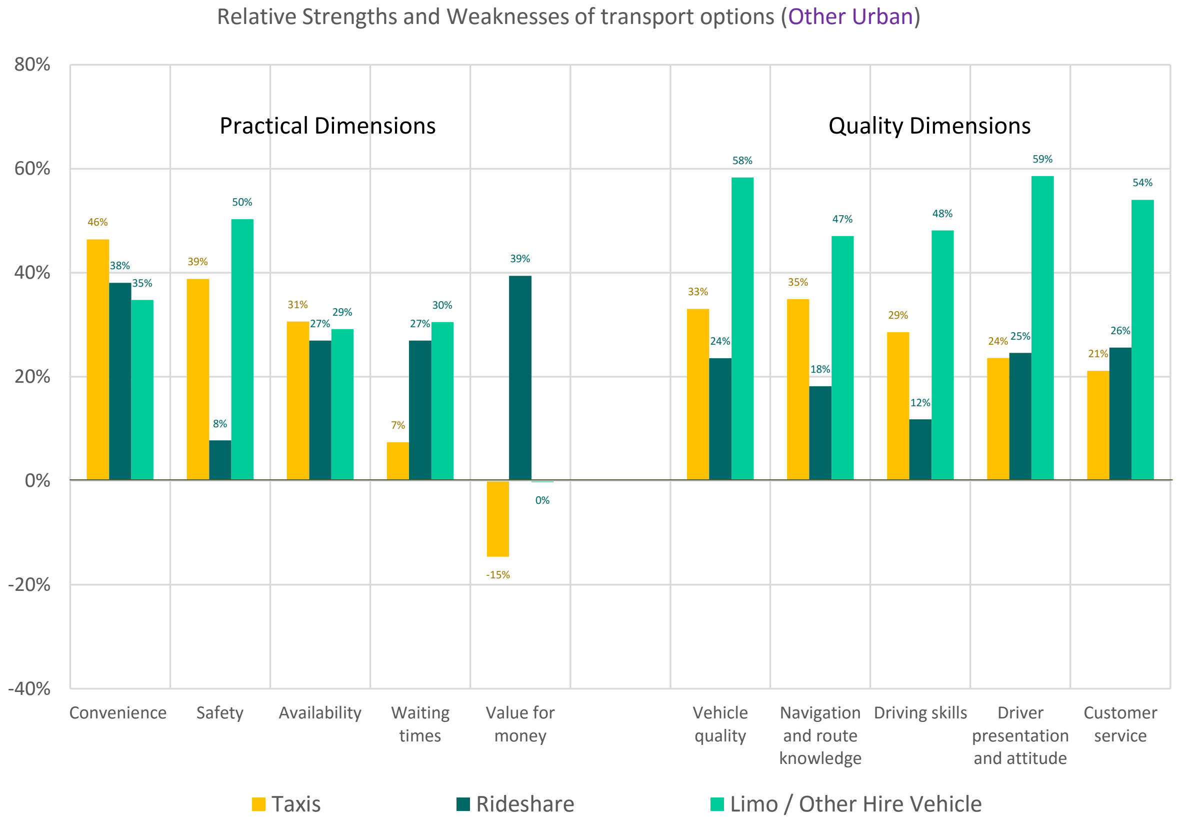
Base = Respondents aware of service in location [Taxis n=2009; Rideshare n=1825; Limo / Other n=1686]

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

In Other Urban there is a similar pattern, except that compared to rideshare taxis are seen somewhat more favourably across the 'quality' dimensions than in Sydney, and also on the practical dimensions of *convenience* and *availability*.

Taxis have relative strengths in terms of *availability* and *convenience*, but are by far the most likely to have *waiting times*, *availability* and *customer service* rated as a weakness.

Figure 16: 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=487; Rideshare n=297; Limo / Other n=374]

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

In the rest of NSW rideshare is again perceived to have an advantage in terms of *value*, and be relatively competitive in terms of *availability* and *convenience*. However, rideshare is *least* likely in this area for most of the other dimensions to be rated as a strength. It should be noted though that few of those respondents aware of rideshare rated these dimensions as an active weakness – and so the differential scores remain reasonably solid.

Taxis are viewed relatively more positively here than in either Sydney or Other Urban on the quality dimensions – scoring similarly highly as limousines and other hire cars in terms of these dimensions as strengths, and this is the only location where these dimensions are not most regularly cited as weaknesses of taxis. However, they are still most likely to have *value*, *waiting times* and *availability* considered as weaknesses.

Figure 17: Strengths and weaknesses of transport options amongst those aware of the service in their region - Rest of NSW Q64

Base = Respondents aware of service in location [Taxis n=415; Rideshare n=131; Limo / Other n=202]

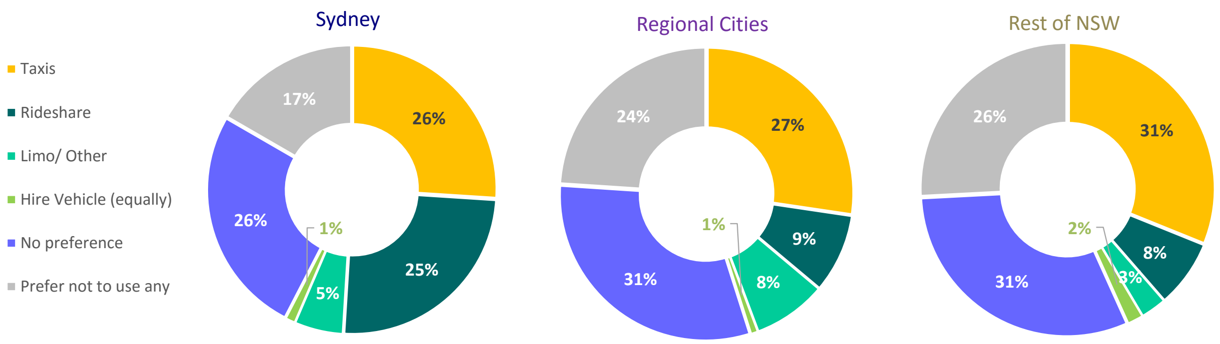
Charts show 'differential' scores calculated as '% strength' minus '% weakness'

Preferences

Preferred forms of transport do vary substantially across locations.

- In Sydney, slightly more respondents had a preference for some form of hire vehicle (32%, mostly rideshare) than did for taxis (26%). Another 26% had no preference, while less than 1-in-5 (17%) prefer not to use any of these types of transport.
- In Other Urban, the proportion preferring taxis was basically the same as in Sydney (27%), but the proportion with a preference for hire vehicles was lower at 18%. Slightly more had no preference (31%) or prefer not to use any (24%) than in Sydney.
- In the rest of NSW the proportion with a preference for hire vehicles drops to just 12%, with each of the other categories picking up a little. Taxis are preferred by 31%, while a similar proportion have no preference and 26% prefer not to use any.

Figure 18: Preferences for transport options Q65/66



Base = All respondents [Sydney n=2048; Other Urban n=501; Rest of NSW n=453]

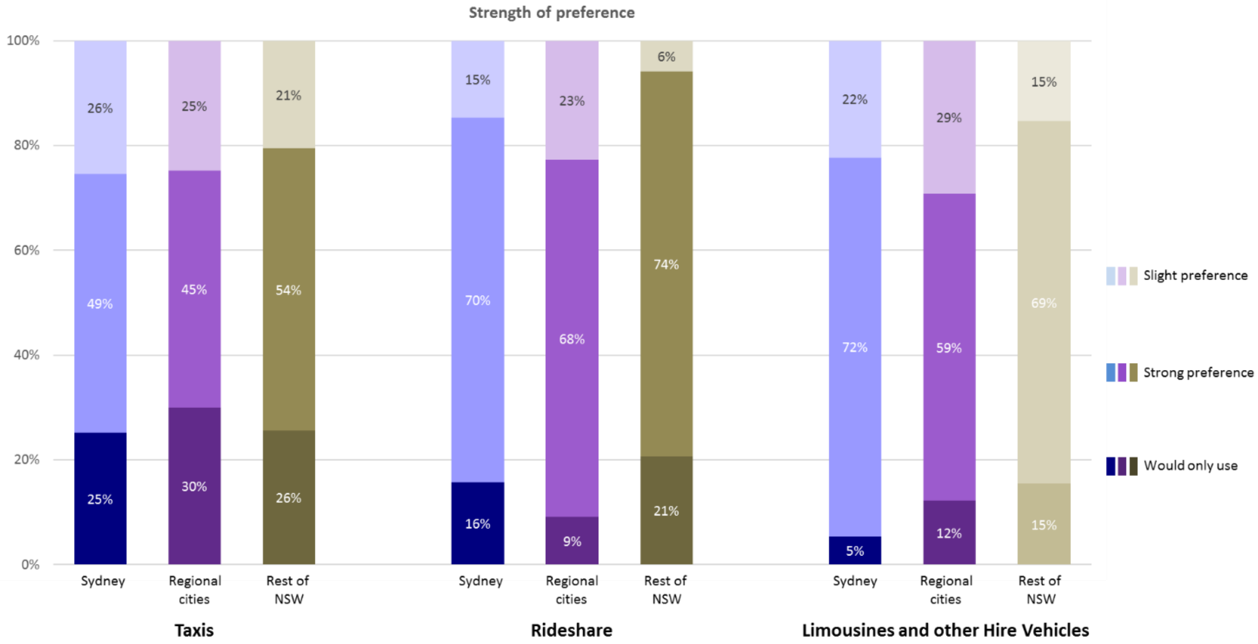
Preferred form of point-to-point transport	**Sydney**	**Other Urban**	**Rest of NSW**
Sample size	*2048*	*501*	*453*
Taxis	**26%**	**27%**	**31%**
Rideshare	25%	9%	8%
Limousine / Other hire vehicle	5%	8%	3%
Hire Vehicle (equally)	1%	1%	2%
Any form of Hire Vehicle	**32%**	**18%**	**12%**
No preference	26%	31%	31%
Prefer not to use any	17%	24%	26%

Strength of preference

Respondents with a preference for taxis tend to be somewhat more likely to say they *will only use taxis* (25%-30%), while users of hire vehicles were more likely to describe themselves as having a *strong preference* (68%-70% for rideshare, and 59%-72% for limousines and other hire vehicles).

These patterns were more similar than dissimilar across the three locations.

Figure 19: 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=112-533; Other Urban n=41-137; Rest of NSW n=13-141]
Note small base size for limousines / other HV in rest of NSW.

Proportion of all respondents represented in chart: Sydney = 58%; Other Urban = 45%; Rest of NSW = 43% - the balance have no preference, or prefer not to use any of these forms of transport

Changes that May Increase Use

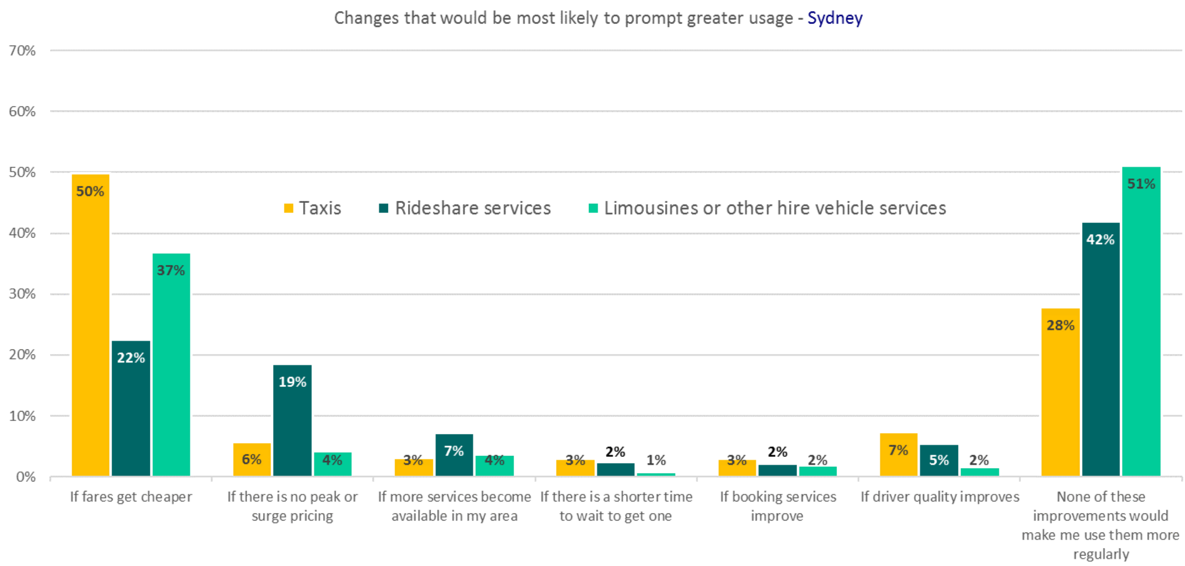
For the most part, it is factors relating to cost which are most likely to prompt increased usage of point-to-point transport services.

For taxis, in all areas by far the single most commonly identified change which may prompt greater usage was *if fares get cheaper*. This was also the dominant response for limousines and other hire vehicles, though greater availability of services was also identified in the rest of NSW area.

For rideshare services *lower fares* did also come through strongly, but not as dominantly. In Sydney the other cost-related change - *if there was no peak or surge pricing* - was the second most commonly cited change, while *service availability in my area* was the other more commonly cited change in Other Urban and in the rest of NSW.

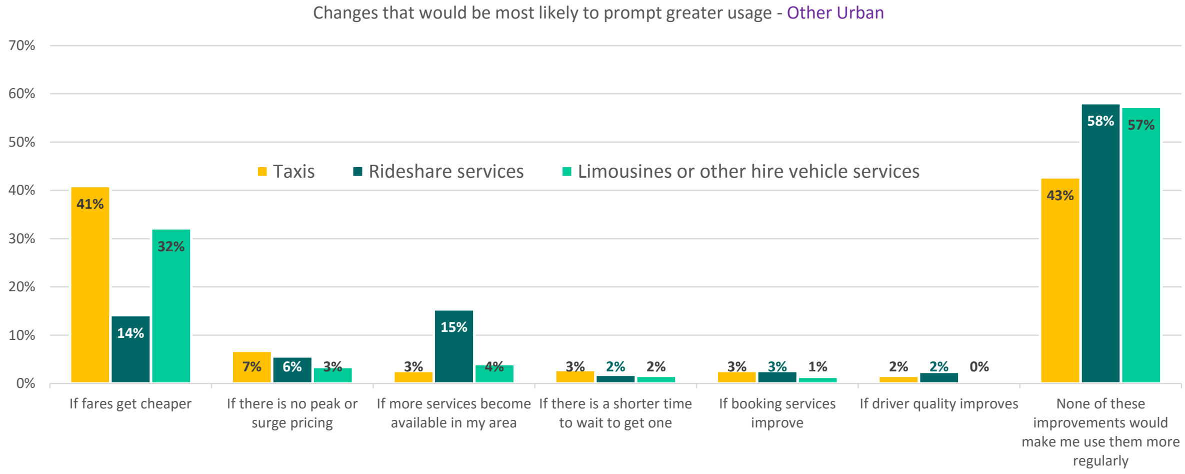
Respondents in all areas were slightly more amenable to the possibility of using taxis more often than using hire vehicles more often. 28%-46% said that *none* of these changes would make them more likely to use taxis more often, compared to 42%-67% for the different types of hire vehicles.

Figure 20: Changes which may prompt greater use of transport services – Sydney Q68



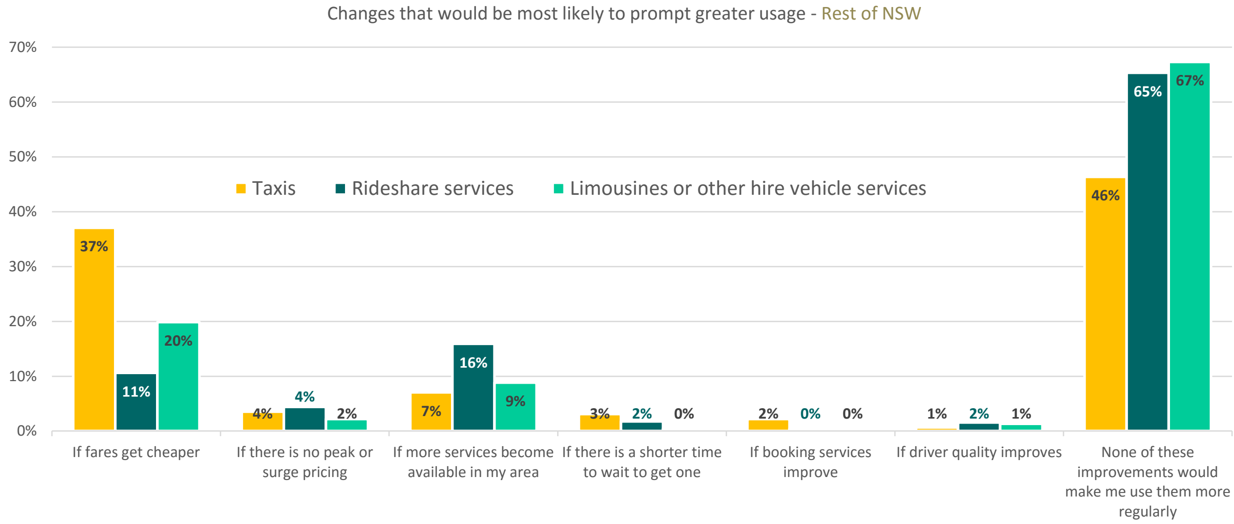
Base = All respondents [Sydney n=2048]

Figure 21: Changes which may prompt greater use of transport services – Other Urban Q68



Base = All respondents [Other Urban n=501]

Figure 22: Changes which may prompt greater use of transport services – Rest of NSW Q68



Base = All respondents [Rest of NSW n=453]

C. Perceived Value for Money

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.

Compared to taxis, only in Sydney does a higher proportion think that rideshare offers *good or OK value* (61% vs 46%). However, less than 6% in each location feel that rideshare represents *poor* value, compared to 25%-43% for taxis – resulting in much higher differential* scores.

Limousines and other hire vehicles fall somewhere in between, with fewer respondents in each location feeling they are *good or OK value* compared to taxis – but also fewer saying they are *poor value*.

Figure 23: Summary of perceptions of value for money by time of trip amongst those aware of the service in their region Q20/21

		Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
		Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
	Sample size	*2009*	*487*	*415*	*1825*	*297*	*131*	*1686*	*374*	*202*
Overall	Good + OK	**46%**	**50%**	**46%**	**61%**	**38%**	**50%**	**36%**	**40%**	**33%**
	Poor	43%	25%	28%	5%	3%	6%	17%	10%	13%
	*Differential**	*3%*	*25%*	*18%*	*55%*	*35%*	*44%*	*18%*	*30%*	*20%*
During the day, before 10pm	Good + OK	**47%**	**48%**	**46%**	**57%**	**37%**	**48%**	**33%**	**37%**	**32%**
	Poor	37%	21%	24%	6%	3%	6%	17%	9%	12%
	Differential	*10%*	*28%*	*21%*	*51%*	*34%*	*42%*	*16%*	*29%*	*19%*
After 10pm - Sun to Thurs	Good + OK	**34%**	**32%**	**33%**	**51%**	**33%**	**44%**	**29%**	**29%**	**27%**
	Poor	43%	26%	30%	9%	6%	8%	18%	10%	12%
	Differential	*-8%*	*6%*	*3%*	*42%*	*27%*	*36%*	*11%*	*19%*	*14%*
After 10pm - Fri and Sat	Good + OK	**31%**	**32%**	**32%**	**49%**	**32%**	**43%**	**29%**	**29%**	**26%**
	Poor	46%	28%	31%	12%	6%	9%	18%	11%	13%
	Differential	*-16%*	*4%*	*1%*	*37%*	*25%*	*34%*	*11%*	*18%*	*13%*
Short trips (under 5km)	Good + OK	**48%**	**47%**	**46%**	**58%**	**36%**	**48%**	**25%**	**24%**	**23%**
	Poor	40%	30%	29%	8%	5%	6%	23%	17%	15%
	Differential	*8%*	*16%*	*17%*	*50%*	*32%*	*42%*	*2%*	*7%*	*8%*
Long distances (15km+)	Good + OK	**36%**	**37%**	**33%**	**55%**	**35%**	**45%**	**32%**	**37%**	**29%**
	Poor	50%	34%	34%	9%	6%	8%	19%	11%	13%
	Differential	*-14%*	*3%*	*-2%*	*45%*	*29%*	*37%*	*13%*	*26%*	*16%*

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

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

- Taxi value is perceived as better during the day and over shorter distances.
- Rideshare is also seen as better value during the day, but doesn't drop off as much in peak periods. Perceptions of rideshare value also do not drop off for longer distances.
- The value represented by limousines and hire cars also drops off somewhat from daytime to evening and peak periods – but actually improves for longer distances.

In Sydney

Figure 24: Perceptions of value for money by time of trip amongst those aware of the service in their region (Sydney) Q20

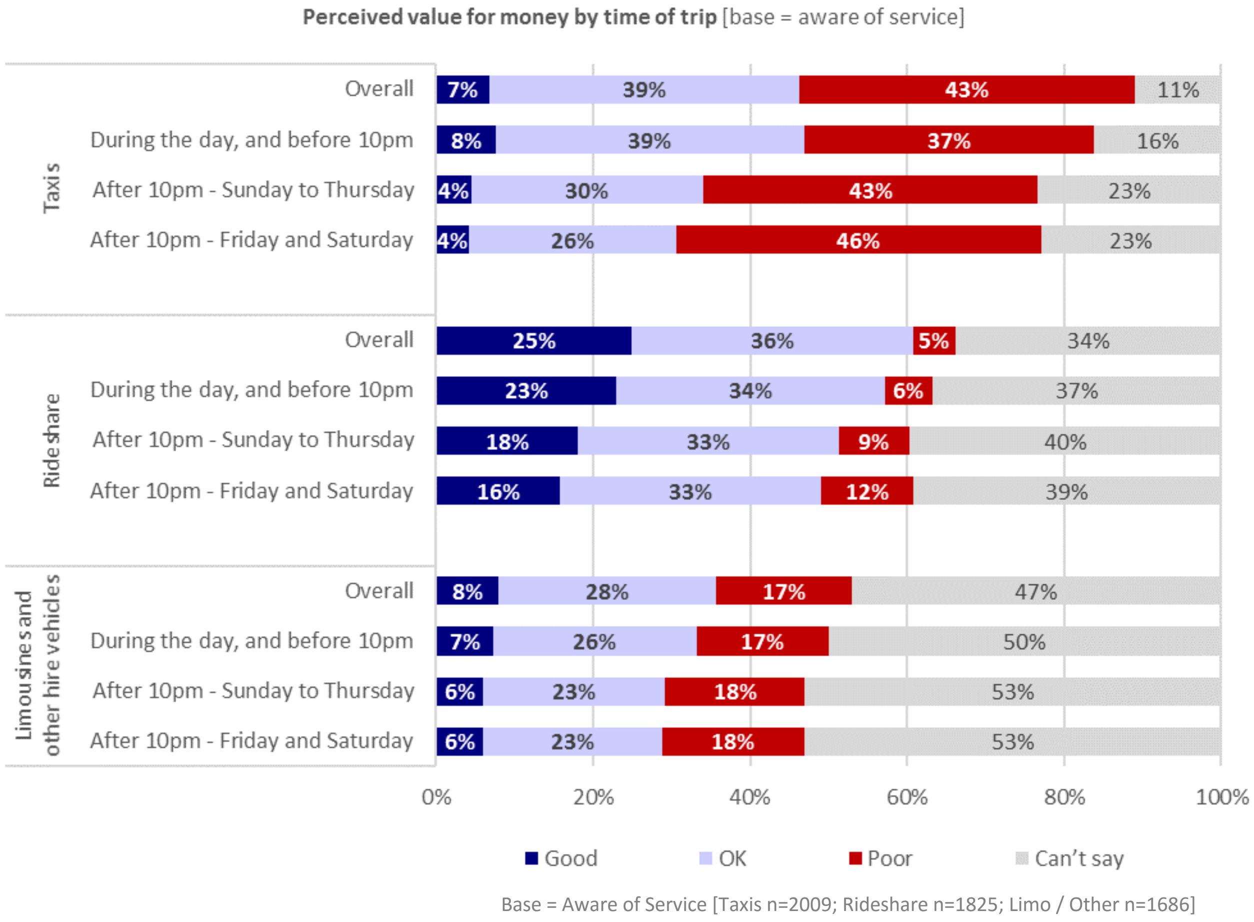
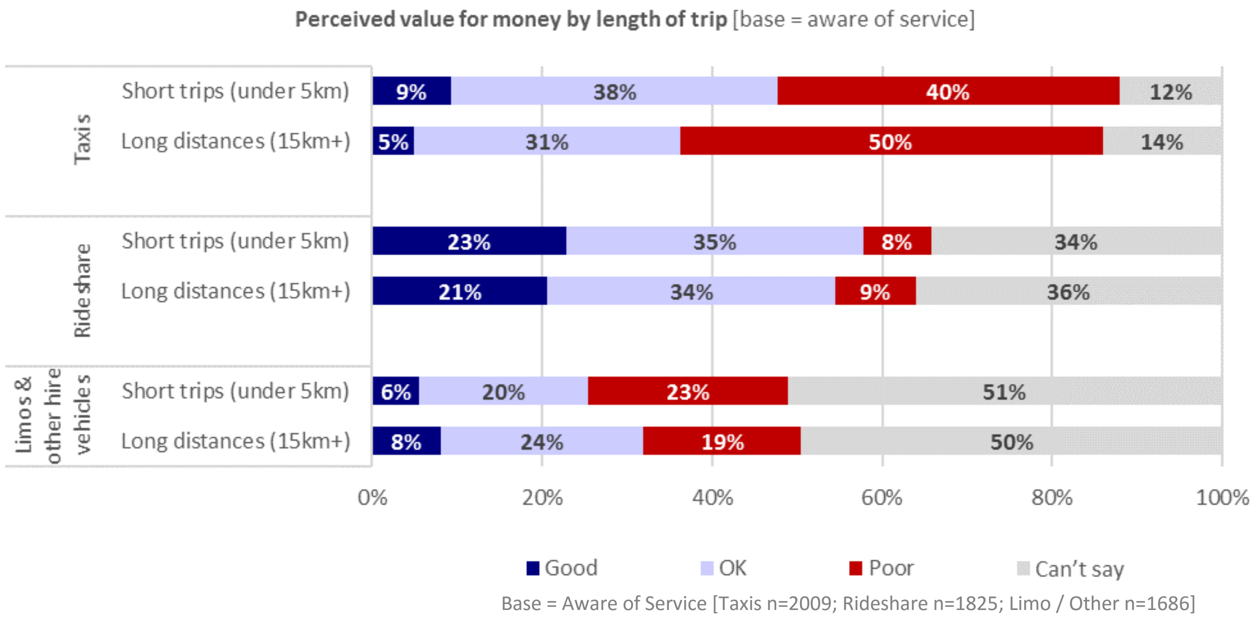


Figure 25: Perceptions of value for money by length of trip amongst those aware of the service in their region (Sydney) Q21



In Other Urban

Figure 26: Perceptions of value for money by time of trip amongst those aware of the service in their region (Other Urban) Q20

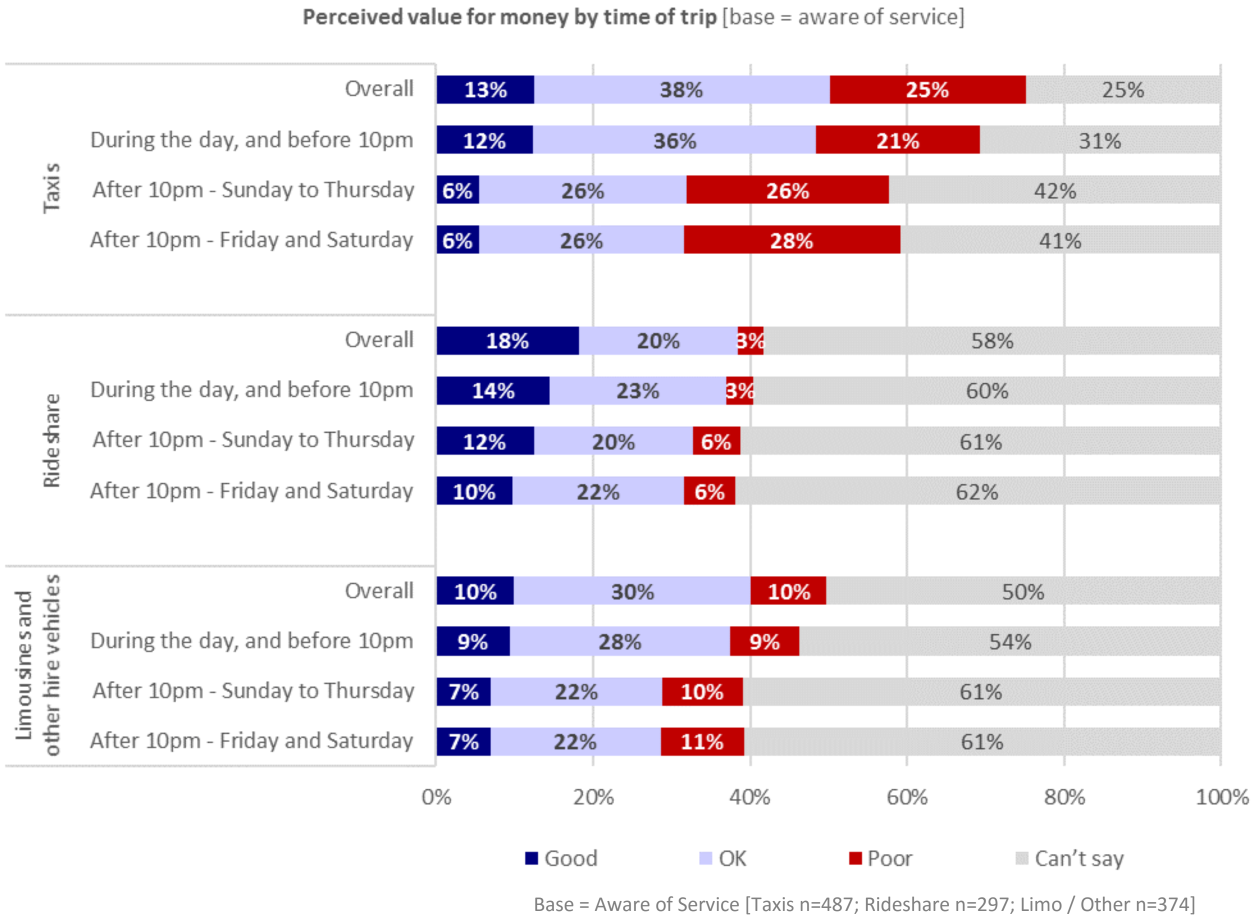
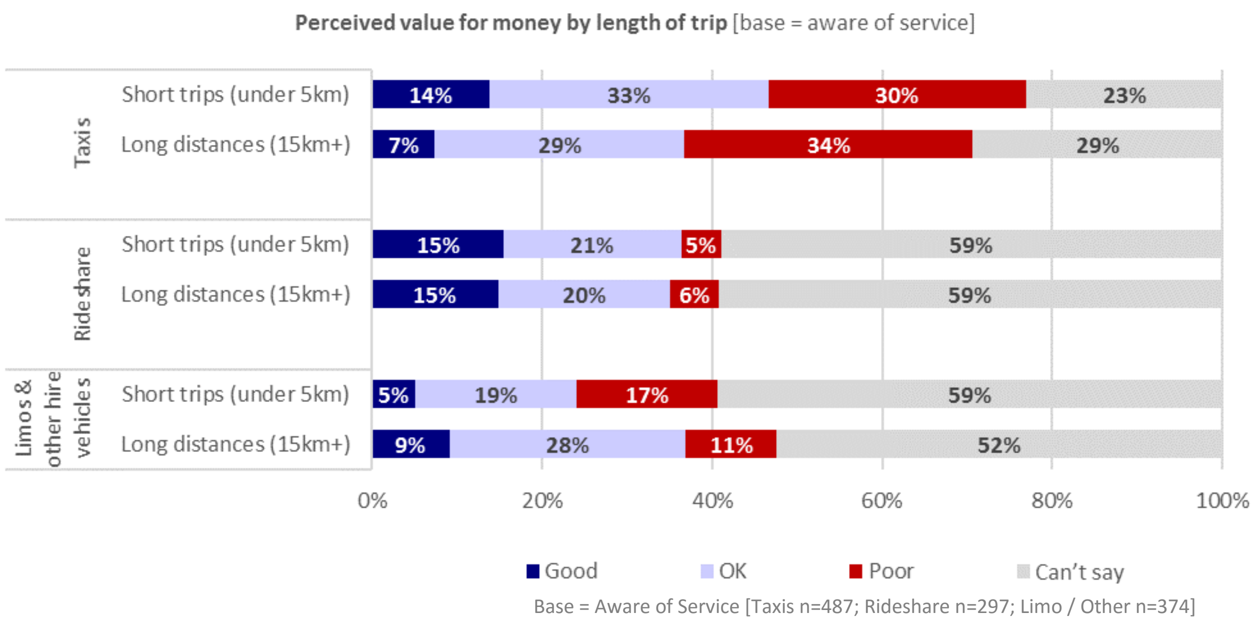


Figure 27: Perceptions of value for money by length of trip amongst those aware of the service in their region (Other Urban) Q21



In the Rest of NSW

Figure 28: Perceptions of value for money by time of trip amongst those aware of the service in their region (Rest of NSW) Q20

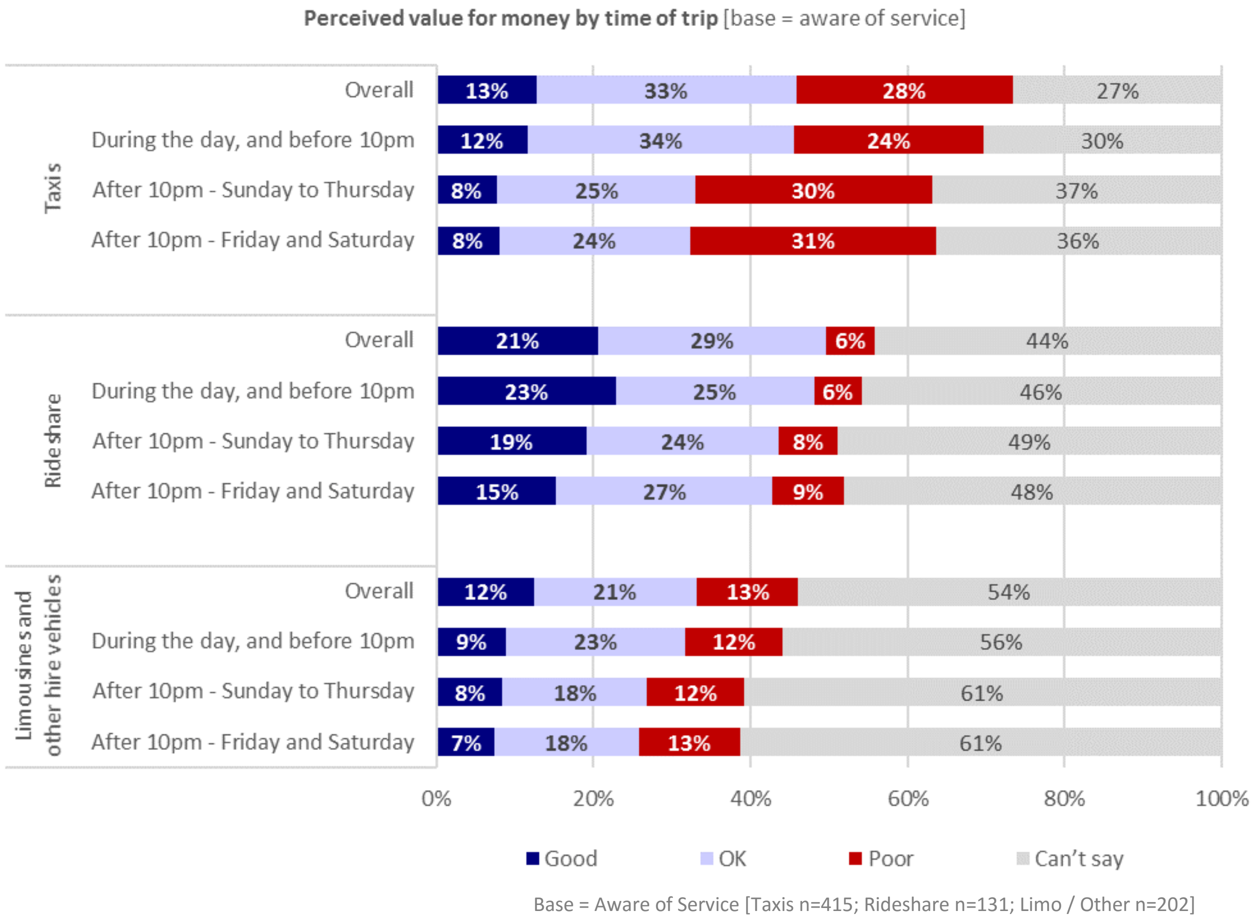
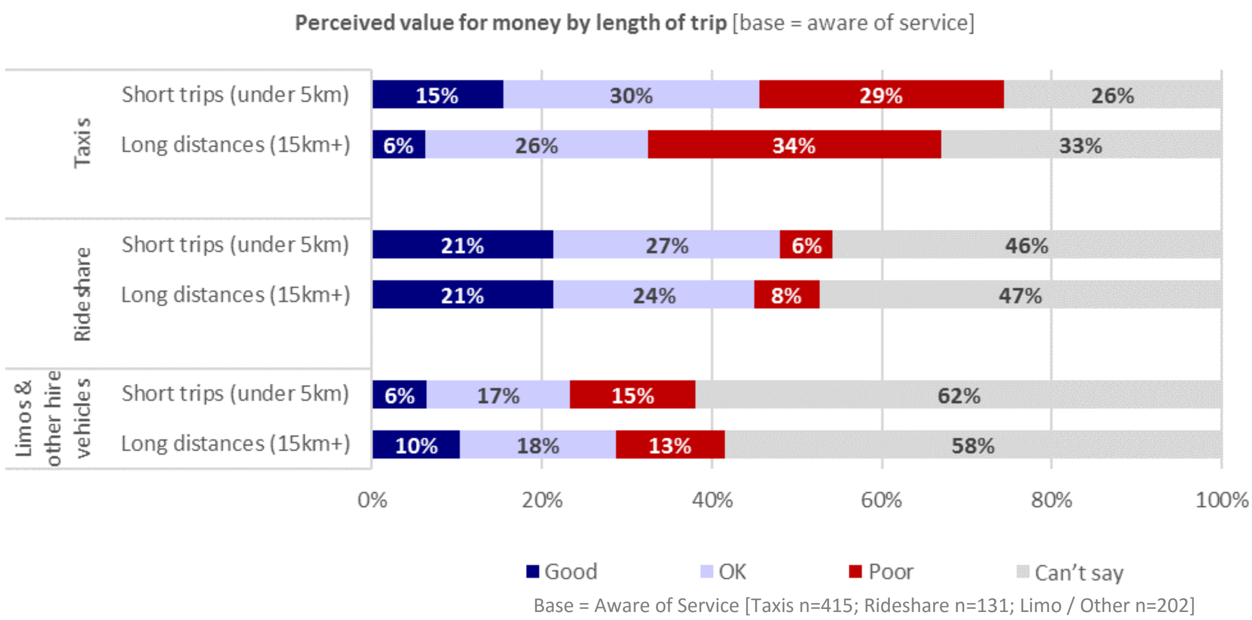


Figure 29: Perceptions of value for money by length of trip amongst those aware of the service in their region (Rest of NSW) Q21



Comparison to previous years

The previous survey question on value for money simply asked whether fares were considered good value for money or not, whereas the new survey offers a three-point scale of good, OK and poor. This means that the results cannot be directly compared, and so are presented alongside each other below.

The previous survey also only asked this question of people who had used taxis in the last 6 months, whereas the new survey asks it of all people aware of the service. The table below filters the 2017 Sydney sample down to the comparable group of respondents who had used taxis in the last 6 months.

The comparison between the simple *good / not good value* scale previously used and the more sensitive new 3-level *good / ok / poor value* scale suggests that the people who previously felt that value was only 'ok' had split themselves between the available 'good value' and 'not good value' options. With this additional category, we see half the total respondent group move into the middle 'ok' category – leaving less than 1-in-10 who see taxi fare value as actively 'good', but also only around 2-in-5 who see it as actively 'poor'.

Across both scales, fares are generally seen as somewhat better value during the day and before 10pm than they are after 10pm; and for short trips than for longer trips. It is probable that at least some of this simply reflects the greater raw magnitude of fares for longer trips and the higher fares charged after 10pm – rather than a true cost/benefit analysis to decide on 'value'. To get respondents to reflect more sensitively on the 'value' represented by these fares would require a more in-depth questioning process.

Sydney	2016 (n=1,015)			2017 (n=1050)			
	Good value	Not good value	(excludes unsure)	Good	OK	Poor	(excludes can't say)
Overall	**28%**	**72%**		**9%**	**49%**	**42%**	2%
Before 10pm	31%	69%	17%	11%	51%	38%	6%
After 10pm Sun-Thurs	30%	70%	32%	7%	43%	51%	13%
After 10pm Fri-Sun	28%	72%	29%	7%	38%	56%	12%
Short trips (<5km)	40%	60%	11%	13%	49%	37%	3%
Long trips (>15km)	29%	71%	16%	7%	40%	53%	5%

Impact of Minimum Rank & Hail Fares

As would be expected, amongst those respondents who used rank and hail taxis in the last 6 months, an increasing minimum fare for this type of trip does have an effect of making this option seem less attractive.

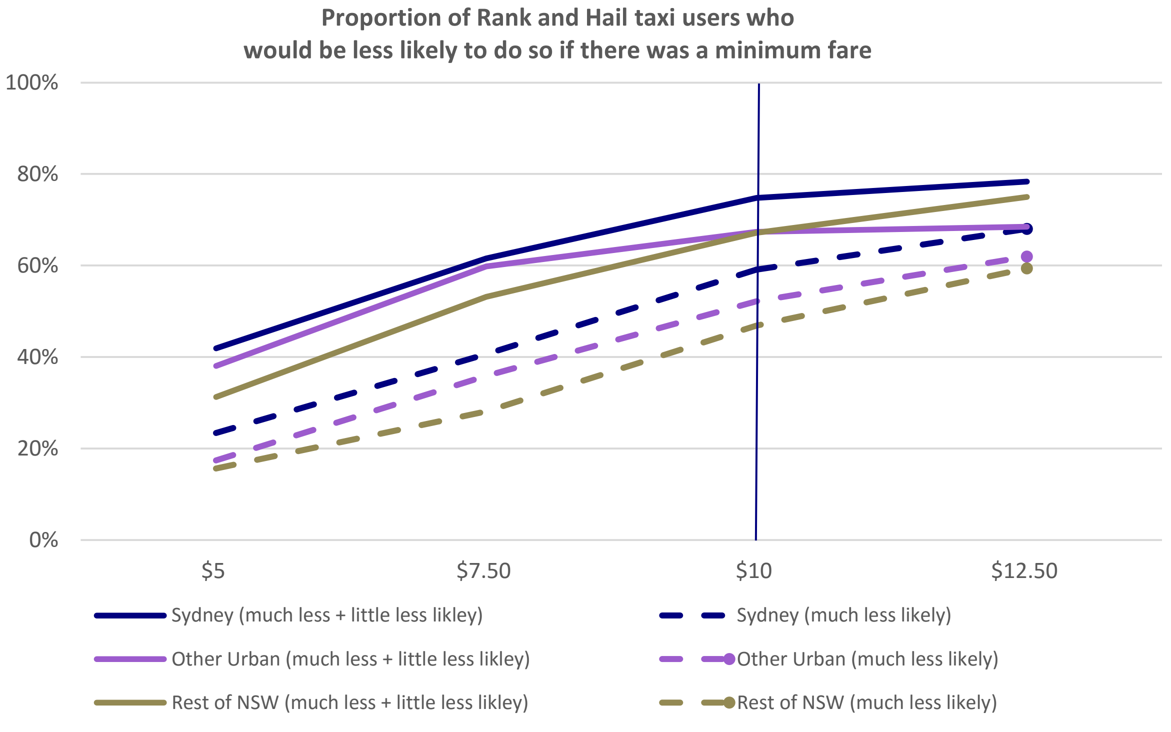
Typically survey responses about anticipated behaviour changes as a result of hypothetical scenarios should be treated indicatively rather than as a quantitative predictor of the magnitude of any change. However, the patterns can show how respondents view different levels of changes and identify sensitivities.

At the $10 minimum fare level, two-thirds (67%) of respondents from Other Urban and the Rest of NSW indicated they would be *at least a little less likely* to use rank and hail taxis, while three-quarters (75%) in Sydney said they would be. Around a half (47%-59%) said this level of minimum fare makes them *much less likely* to do so.

It is also notable that:

- Respondents in the rest of NSW region were slightly less sensitive to possible minimum fares (noting also the much smaller base size), while Sydney respondents were the *most* sensitive.
- The rate at which respondents said they were *much less likely* to use rank and hail increased fairly linearly across the four fare levels tested (ie: the dashed lines below are quite straight). However, the rate at which being *a little less likely* increased was less linear (ie: the solid lines have a curved shape). The differential impact of higher minimum fare levels on being *a little less likely* to use rank and hail taxis was highest at the second level ($7.50) and lowest at the fourth level ($12.50).

Figure 30: 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=697; Other Urban n=92; Rest of NSW n=64]

D. Methods of Obtaining Transport Services

There are a number of observations that can be made about the ways respondents reported obtaining point-to-point transportation vehicles:

- In Sydney all four methods of obtaining taxis are approximately equally prevalent, but outside of Sydney hailing taxis in the street is very uncommon.
- Rideshare services are most commonly obtained by ASAP booking, and in Sydney in particular the ratio of ASAP to pre-booked rideshare services is much higher than for taxis.
- Limousines and other hire vehicles are most commonly pre-booked, rather than ASAP bookings.

Figure 31: Prevalence of methods of obtaining transport in the population Q22

% of population		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	19%	11%	12%
	ASAP booked	23%	**20%**	**21%**
	Rank	24%	**17%**	13%
	Hail	22%	4%	3%
Rideshare	Pre-booked	12%	4%	4%
	ASAP booked	**29%**	**8%**	6%
Limousines and other hire vehicles	Pre-booked	**10%**	**6%**	3%
	ASAP booked	2%	2%	2%

Base = All respondents [Sydney n=2048; Other Urban n=501; Rest of NSW n=453]

Figure 32: Prevalence of methods of obtaining transport in amongst recent users Q22

% of users (last 6 months)		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	37%	31%	36%
	ASAP booked	45%	**57%**	**66%**
	Rank	47%	**49%**	42%
	Hail	43%	11%	8%
	Sample size	*1050*	*176*	*146*
Rideshare	Pre-booked	32%	43%	44%
	ASAP booked	**80%**	**75%**	**72%**
	Sample size	*743*	*51*	*36*
Limousines and other hire vehicles	Pre-booked	**83%**	**82%**	72%
	ASAP booked	20%	21%	56%
	Sample size	*234*	*38*	*18*

Base = Used transport type within the last 6 months

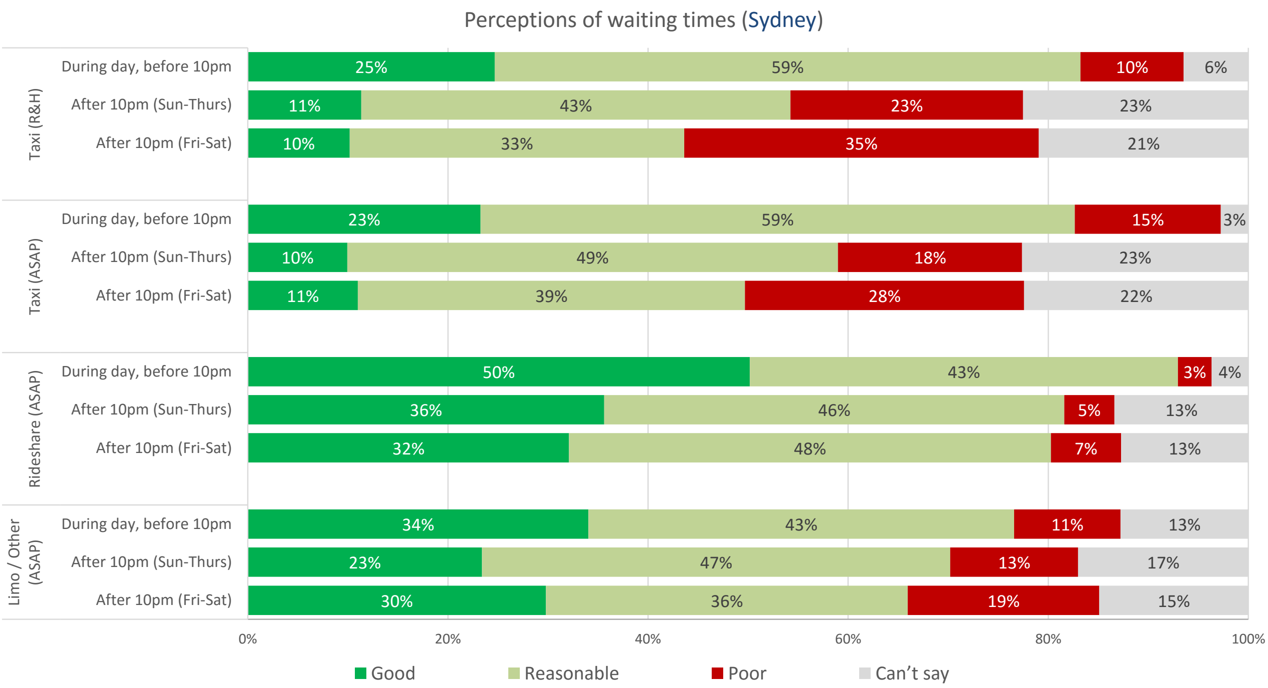
Waiting Times

In virtually all combinations of location and transport type, other than where sample sizes are too small to be reliable, a) waiting times are perceived to be better during the day than after 10pm, and b) worst after 10pm during the peak Friday and Saturday periods.

There are consistent differences observed between the different methods and transport types:

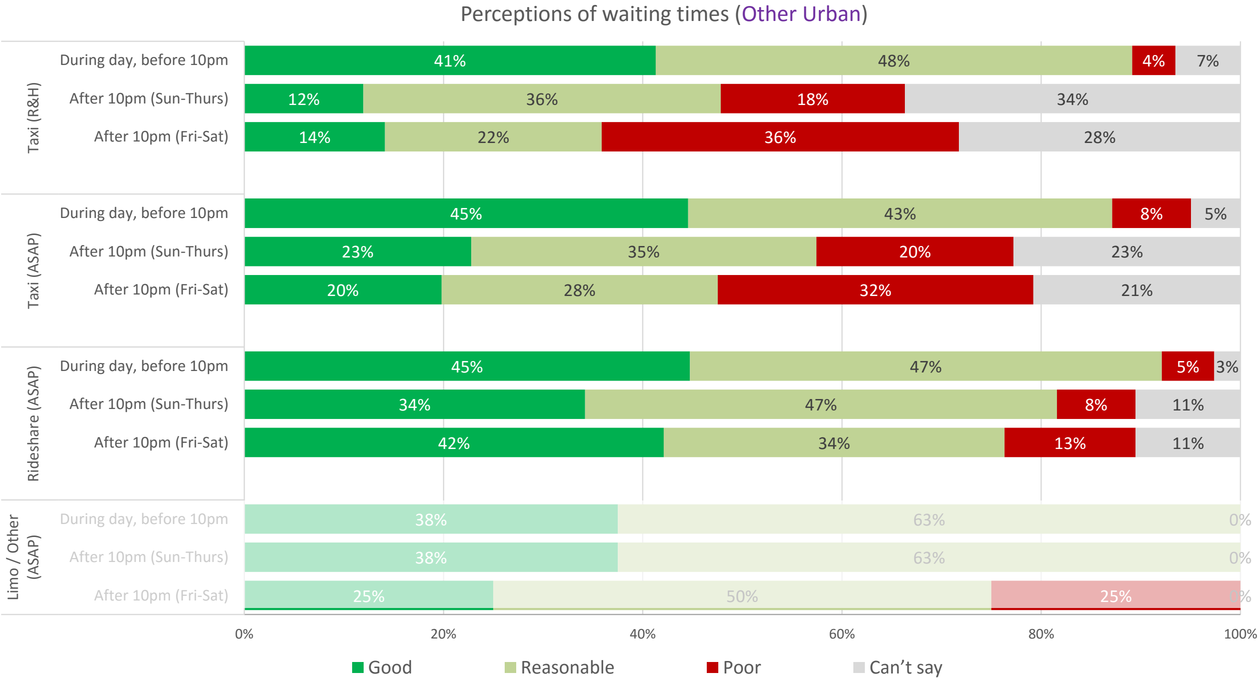
- There is little distinction between rank and hail (R&H) and ASAP booked taxi waiting times during the day – but in the after 10pm time periods ASAP booked taxis are felt to be slightly better across all locations.
- ASAP rideshare waiting times are considered better than ASAP or R&H taxi waiting times for all time periods in Sydney – and substantially better in the after 10pm periods. Similar patterns are evident off much smaller customer base numbers in the other locations.
- Very few report using ASAP limousines or other hire vehicles, but in Sydney (the only location with a sufficient sample size to consider), perceptions of the reasonableness of waiting times appears to be somewhere in between taxis (low) and rideshare (high).

Figure 33: User perceptions of waiting times (Sydney) Q23-26



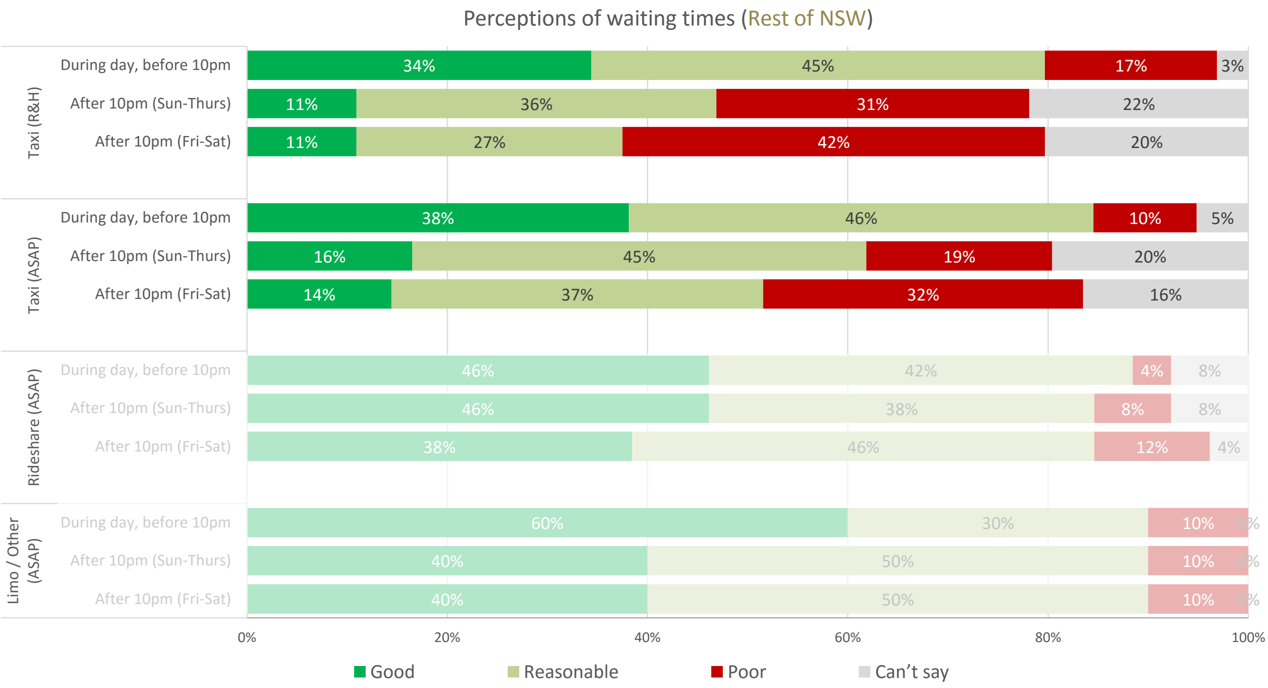
Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=697; Taxi ASAP n=473; Rideshare ASAP n=598; Limo / Other ASAP n=47]

Figure 34: 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=92; Taxi ASAP n=101; Rideshare ASAP n=38; Limo / Other ASAP n=8*]

Figure 35: User perceptions of waiting times (Rest of NSW) Q23-26

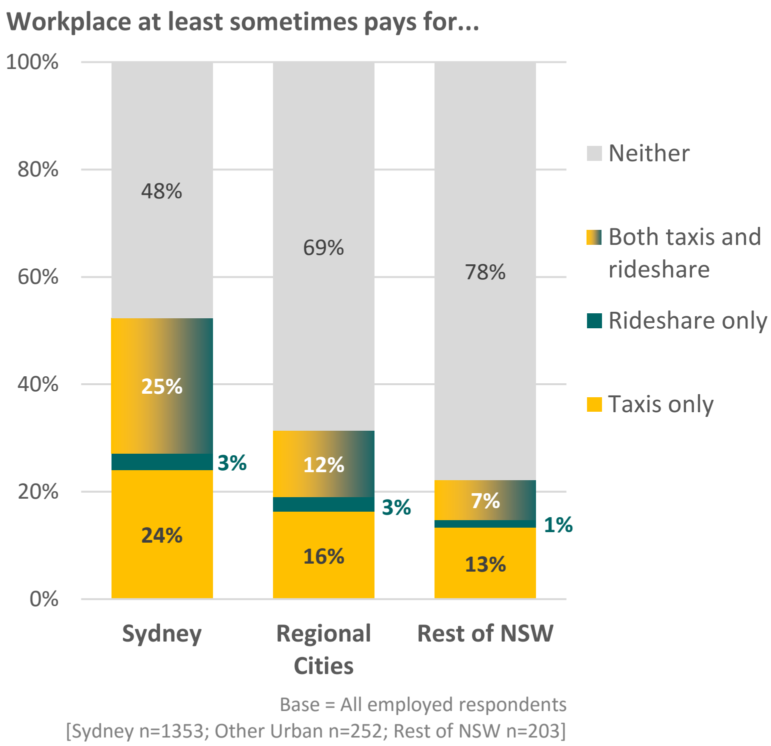


Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=64; Taxi ASAP n=97; Rideshare ASAP n=26*; Limo / Other ASAP n=10*]

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

E. Workplace Policies

Figure 36: Workplace paying for transport Q32



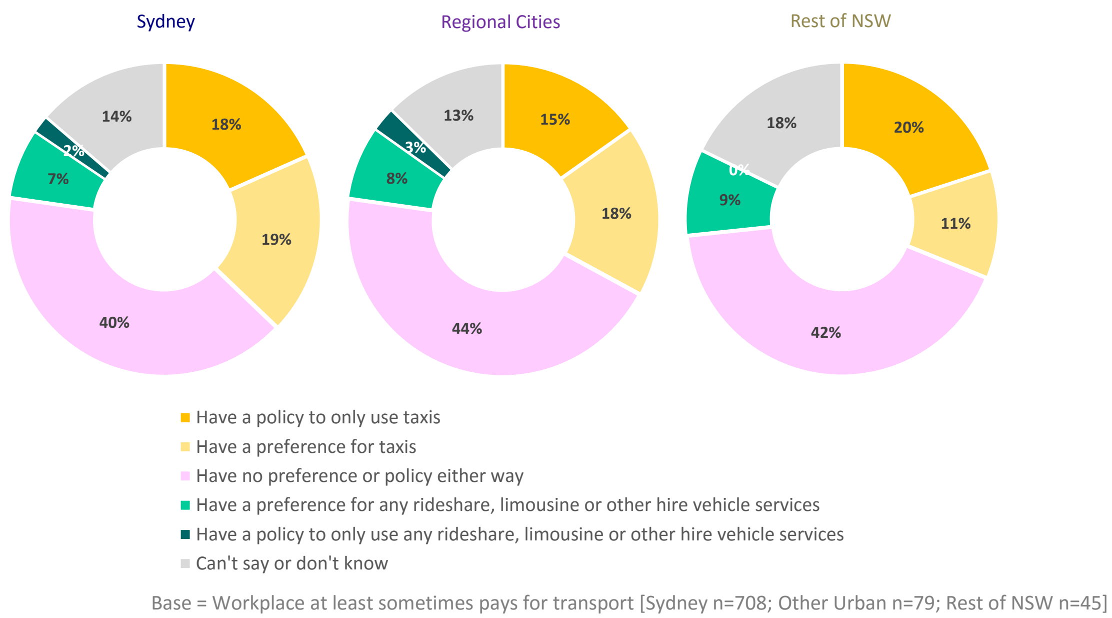
Half of all employed Sydney-respondents said that their employer at least sometimes pays for employees to use point-to-point transport. The proportions were considerably lower in the other locations – closer to a third in Other Urban and less than a quarter in the rest of NSW sample.

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

Very few paid for rideshare use only, and not taxis (just 1%-3%). Much larger proportions paid for taxis only (13%-24%).

This discrepancy in behaviours is consistent with respondent perceptions of employer policies and preferences. While the majority of respondents whose workplace at least sometimes pays for transport reported no known preferences or policies, 3-to-4 times as many reported a preference or policy in favour of taxis as did one in favour of hire vehicles. 15%-20% reported a known policy of only using taxis.

Figure 37: Workplace policies and preferences on paying for transport Q34



Change in employer behaviours

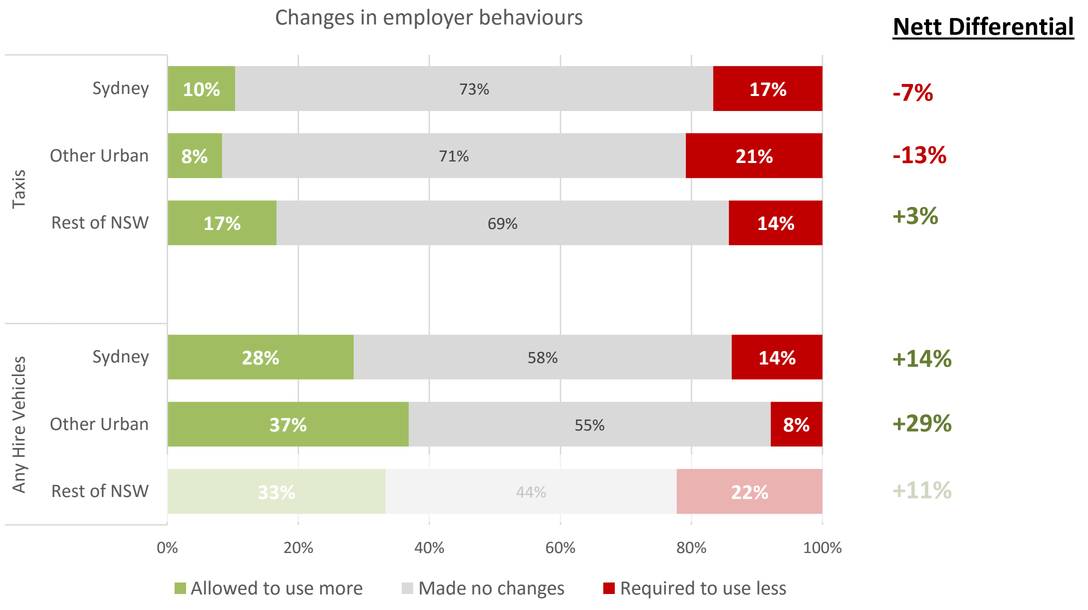
While respondents perceived that their employers currently are more likely to pay for employees to use taxis than hire vehicles[3], and to have policies and preferences that are more positive towards taxis – they also see that there is a nett change away from them.

In Sydney, 17% 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 only 10% allowed taxi use to increase – for a nett change of -7%. The equivalent figure for hire vehicles was a nett change of +14% amongst those whose employers already do pay at least sometimes for rideshare usage.

A similar pattern was seen in Other Urban – though if anything even more dramatically. The nett change in both types of transport was larger (though the sample sizes are much smaller and should be interpreted with some caution), with a nett decline of -13% reported for taxis and a nett increase of +29% reported for hire vehicles. While the magnitude of the reported changes in Other Urban should be interpreted with caution, the consistency of the pattern with the much more robust Sydney samples suggests a similar change is perceived.

The sample sizes for the rest of NSW are very small (especially for respondents who have an employer who already pays for staff to at least sometimes used hire vehicles), but again, a similar broad pattern appears to be evident.

Figure 38: Changes in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33



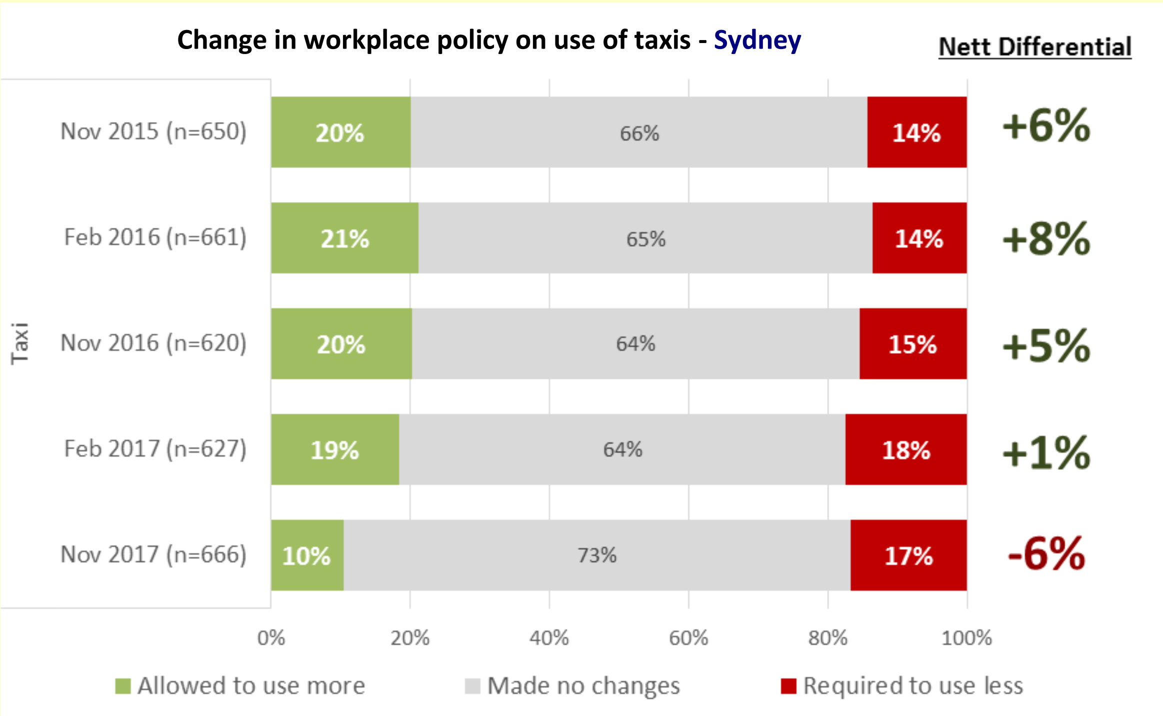
Base = Workplace at least sometimes pays for that transport [Sydney n=383-666; Other Urban n=38-72; Rest of NSW n=18*-42]

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

Comparison to previous years

The comparison of 2017 results in terms of employers' willingness to allow staff to use taxis should be quite comparable to previous surveys. Previous surveys was limited to only people who had used taxis in the last 6 months, and so the 2017 results shown in the comparison chart below have been re-filtered to show only a comparable group.

It shows fewer respondents reported their employer allowed more use of taxis in the last 12 months, but a similar proportion who required them to use taxis less. The cumulative result of these two results was a small negative differential figure for 2017, when the previous surveys had yielded a slightly positive differential score.



F. Last-Trip Details

Type of point-to-point transport

While rideshare users have been increasing their use of this type of vehicle, and there has been apparent 'downward pressure' on taxi use, nonetheless taxis remain by far the most prevalent type of vehicle to have been last used by respondents – even in Sydney (where 56% of last trips were in a taxi, compared to 39% in a rideshare). Limousines and other hire vehicles made up only a small proportion of last reported trips.

Figure 39: Usage of vehicle types for last trip (base = all respondents) **QX**

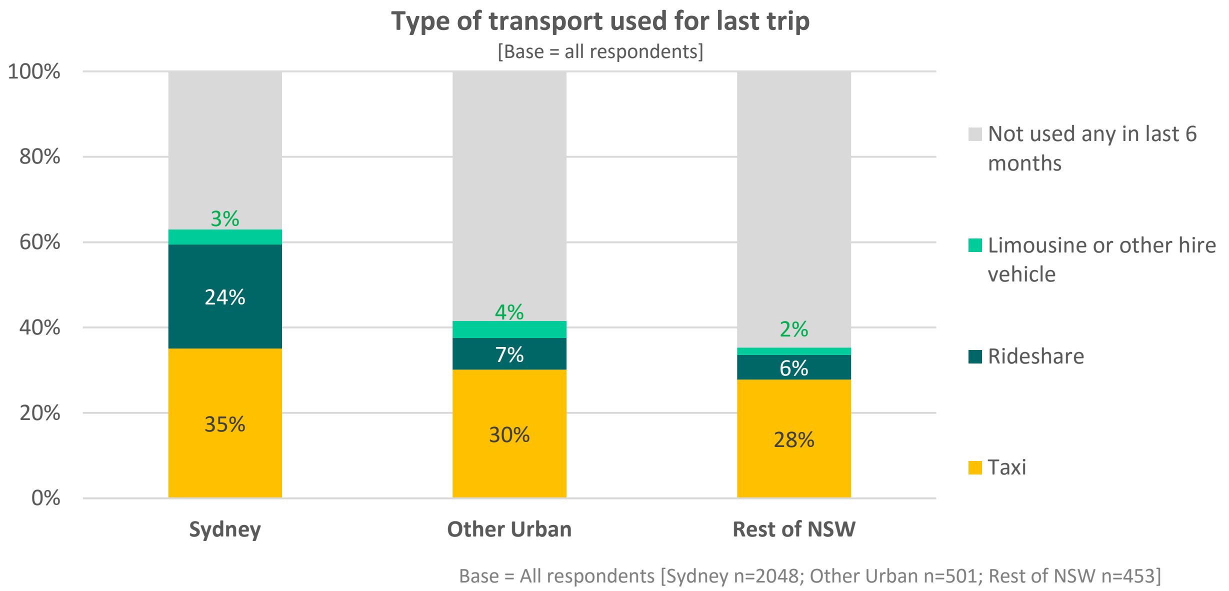
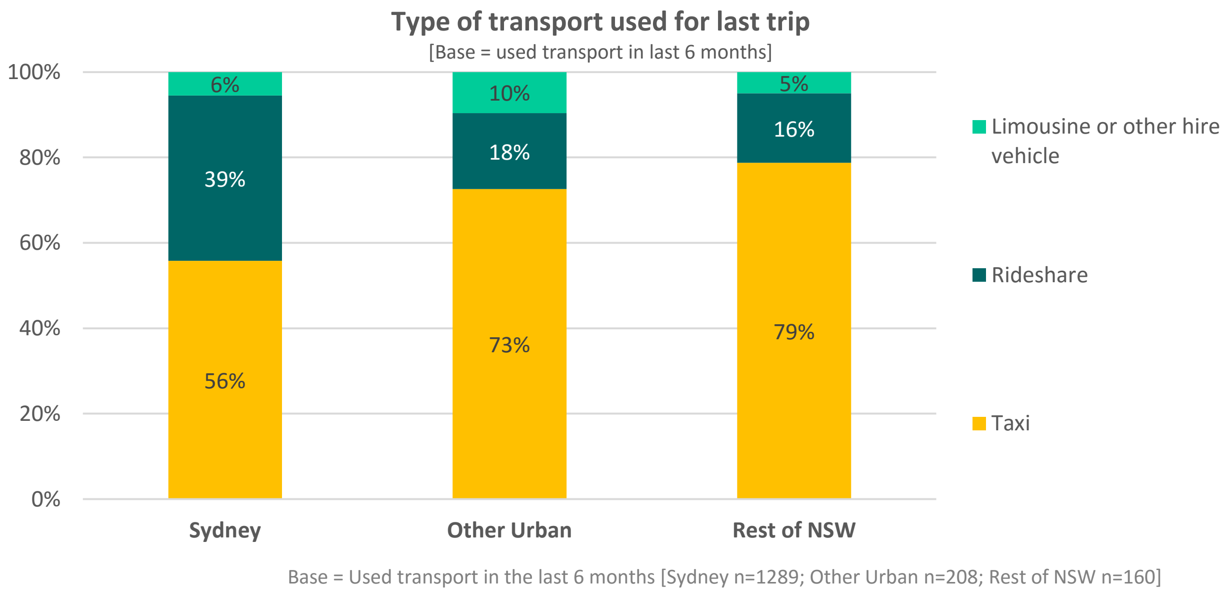


Figure 40: Usage of vehicle types for last trip (base = used transport in last 6 months) **QX**



Trip Characteristics

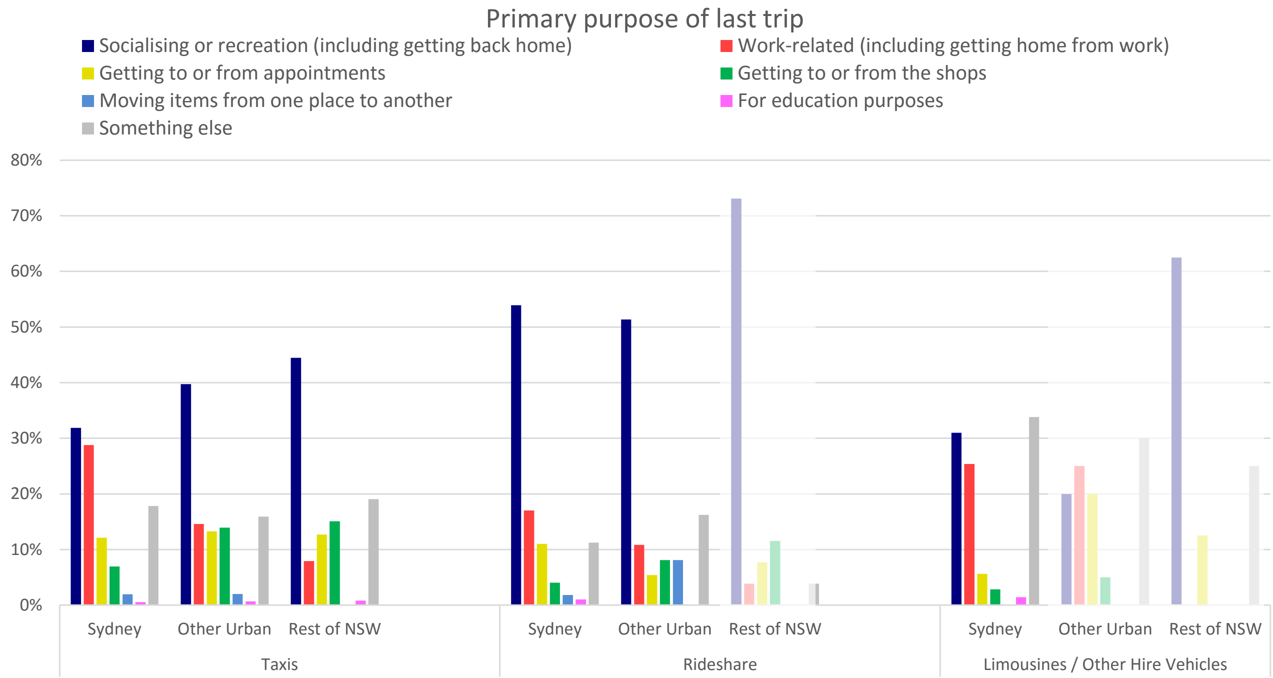
This section looks at details of respondents' last trip in any type of point-to-point transport. Sample sizes for hire vehicles outside of Sydney are very small, and results for groups with sample of less than 30 are generally shown in a greyed out form in all tables and charts, and should be interpreted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

Group	Sydney – taxi	Sydney – Rideshare	Sydney – Limo / Other HV	Other Urban – taxi	Other Urban – Rideshare	Other Urban – Limo / Other HV	Rest of NSW – taxi	Rest of NSW – Rideshare	Rest of NSW – Limo / Other HV
Sample	719	151	126	499	37	26*	71	20*	8*

Purpose

Socialising was the dominant purpose for point-to-point transport trips generally. This was especially the case for rideshare, less so for taxis – especially in Sydney, where work-related trips were approximately equally common.

Figure 41: Last trip – Primary purpose Q39



Last trip – Primary Purpose	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*719*	*151*	*126*	*499*	*37*	*26**	*71*	*20**	*8**
Socialising or recreation (inc getting back home)	32%	40%	44%	54%	51%	73%	31%	20%	63%
Work-related (inc getting home from work)	29%	15%	8%	17%	11%	4%	25%	25%	0%
Getting to or from **appointments**	12%	13%	13%	11%	5%	8%	6%	20%	13%
Getting to or from the **shops**	7%	14%	15%	4%	8%	12%	3%	5%	0%
Moving items from one place to another	2%	2%	0%	2%	8%	0%	0%	0%	0%
For **education** purposes	1%	1%	1%	1%	0%	0%	1%	0%	0%
Something else	18%	16%	19%	11%	16%	4%	34%	30%	25%

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

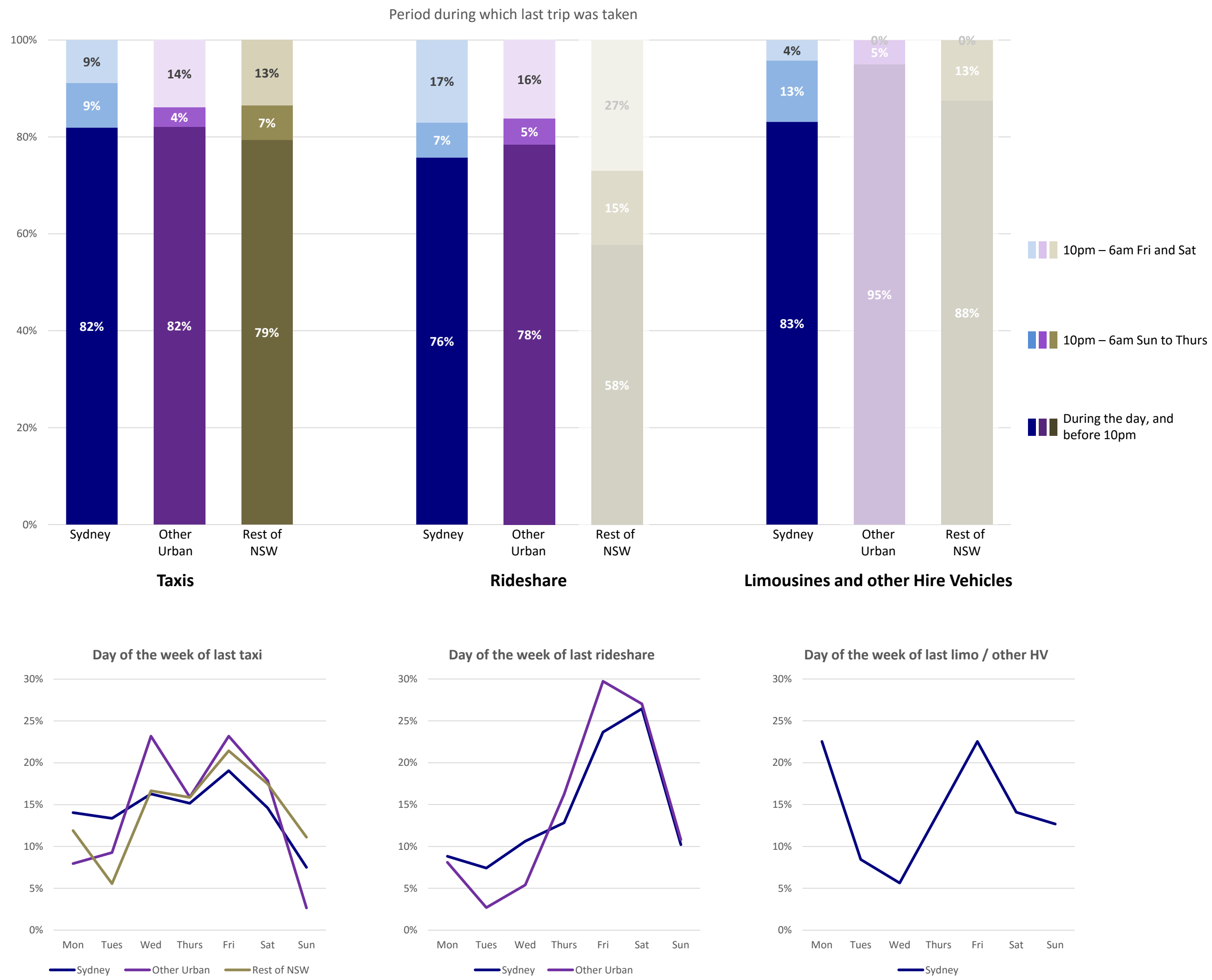
Time

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

In Sydney, across all three types of transport between 76% and 83% were daytime or before 10pm trips. Of the small proportions of trips taken after 10pm and before 6am the next day, the taxi trips were evenly split between Sunday-Thursday and Friday-Saturday. More than two-thirds of the rideshare trips after 10pm were on Friday and Saturday nights, and much fewer Sunday-Thursday.

Overall, rideshare trips showed a stronger concentration around Fridays and Saturdays as compared to taxis, which were more evenly distributed through the week, and lowest on Sundays.

Figure 42: Last trip – Period and day commenced Q38

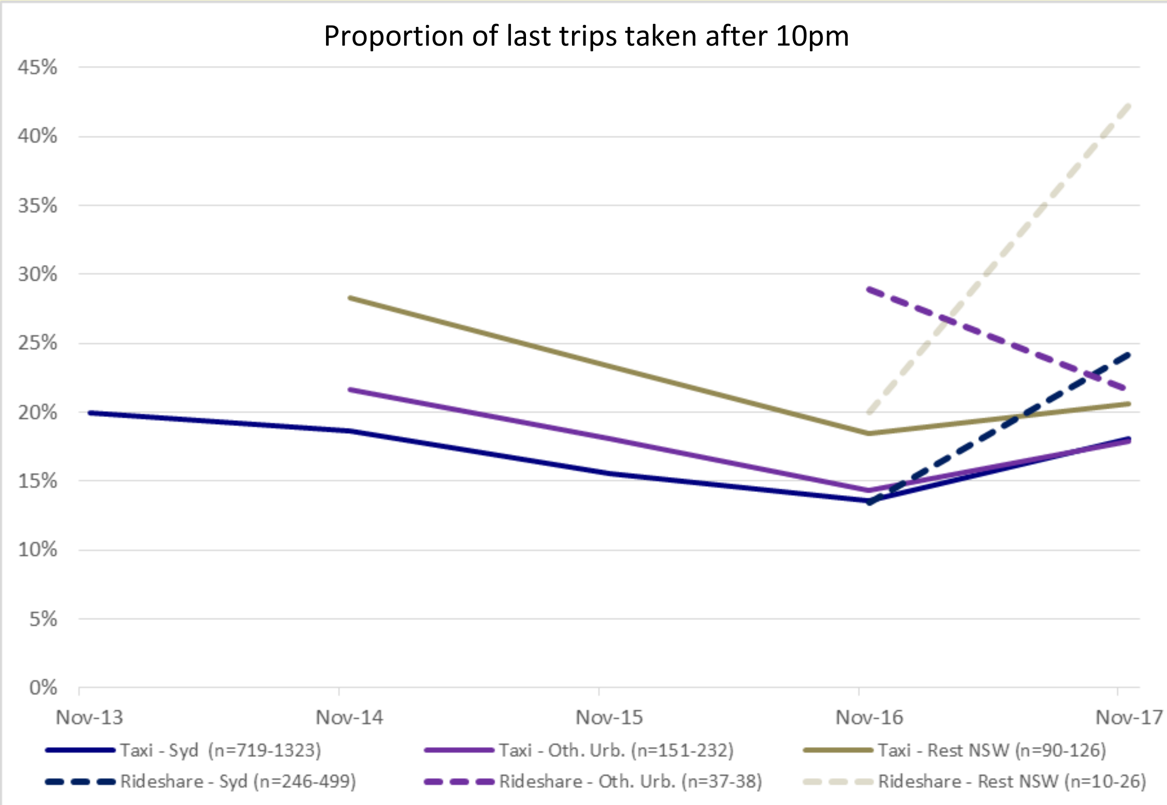


Base = Used transport in the last 6 months [Sydney n=126-719; Other Urban n=26-499; Rest of NSW n=8-71]

Comparison to previous years

The proportion of reported 'last taxi trips' which were taken after 10pm had been trending slowly downwards over the previous period of tracking. The 2017 figures should be broadly comparable methodologically. In the past respondents who had used both taxis and rideshare in the last 6 months were randomly allocated to report on one or the other, whereas in 2017 they reported on whichever was most recent. However, this should not systematically affect the time of trips reported on.

The 2017 results are slightly up for taxis in each of the three locations, though overall a slight downward trendline would still apply. The proportion of rideshare trips in Sydney that were after 10pm rose more sharply, which is congruent with the higher overall proportion of rideshare trips taken after 10pm that is seen in the 2017 results.



Pick-up Location

Private homes were the most commonly reported pick up point for a last trip. Rideshare services were the least likely to have been caught from airports or other transport hubs, but perhaps slightly more likely to have been caught from a pub, club or similar location.

Figure 43: Last trip – pick up locations Q37

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

Last trip – Pick up locations	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*719*	*151*	*126*	*499*	*37*	*26**	*71*	*20**	*8**
A **private home** or apartment	**28%**	**40%**	**44%**	**43%**	**41%**	**42%**	**49%**	**55%**	**63%**
Airport / **train** station / other **transport** hub	**25%**	**17%**	8%	9%	3%	4%	**30%**	25%	13%
A **workplace** or office	**15%**	7%	4%	9%	5%	0%	**10%**	5%	13%
CBD, **town centre** or other **busy area**	14%	7%	9%	**13%**	3%	15%	4%	0%	13%
A **shop** or **shopping centre**	7%	12%	**13%**	5%	**8%**	12%	3%	5%	0%
A **pub**, **club** or similar	7%	**13%**	**15%**	**12%**	**30%**	23%	0%	0%	0%
At an **event**	2%	3%	2%	5%	5%	0%	4%	0%	0%
Hospital / Other **medical** facility	1%	1%	6%	1%	0%	4%	0%	0%	0%
Taxi **rank**	1%	0%	0%	0%	0%	0%	0%	0%	0%
On a street / **hailed** from street	0.4%	1%	0%	1%	0%	0%	0%	0%	0%
Hotel	0.3%	0%	0%	1%	5%	0%	0%	0%	0%
Somewhere else	0.1%	0%	0%	1%	0%	0%	0%	10%	0%

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

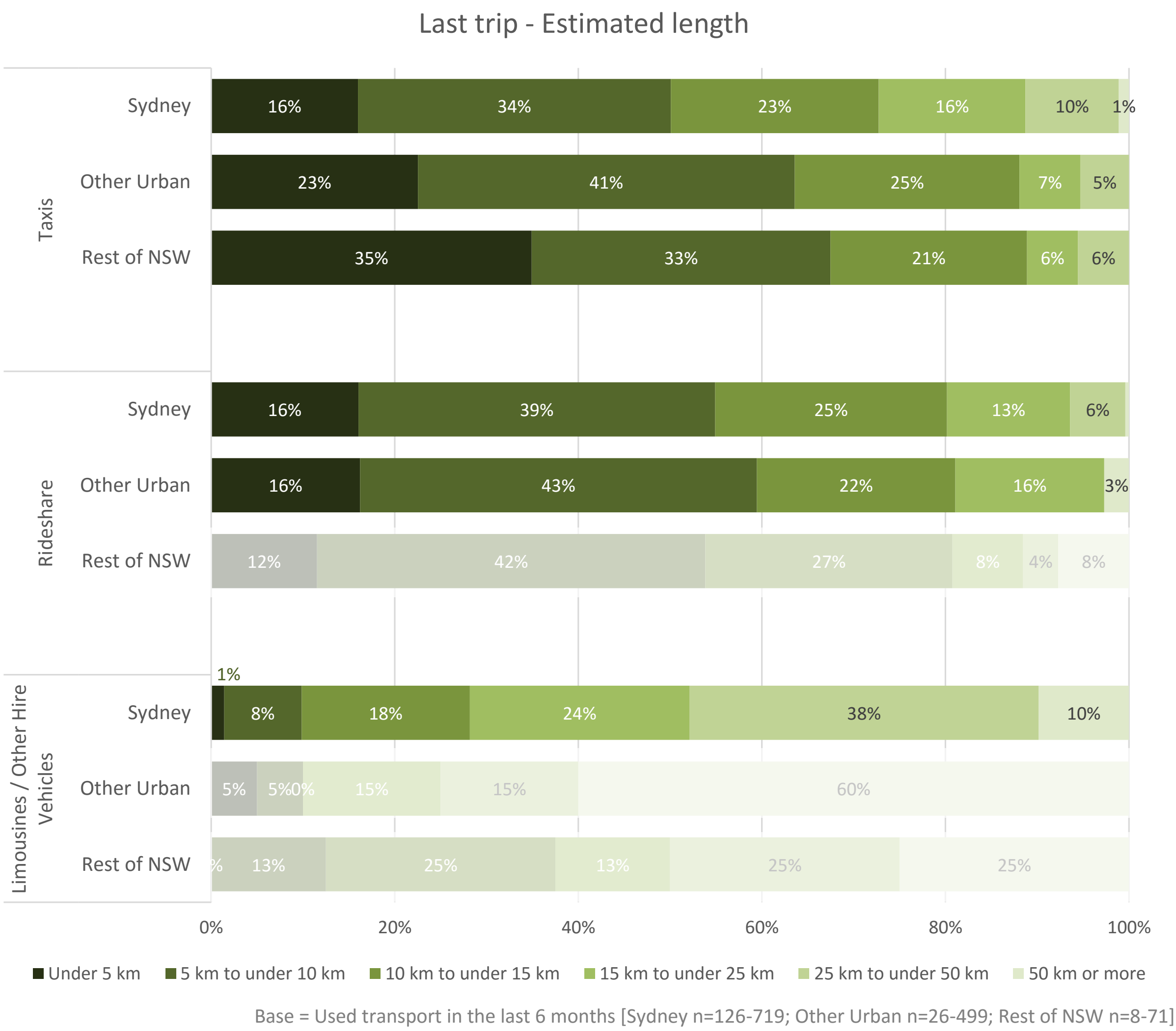
Length

Estimated length of taxi trips tended to be shortest in the rest of NSW sample and longest in Sydney. Around two thirds of trips outside of Sydney were estimated to be under 10km, compared to half of those in Sydney.

The sample sizes for rideshare outside of Sydney is too small for firm observations, but there was little substantive difference in estimated lengths of rideshare and taxi trips in Sydney.

Perhaps not surprising, trips in limousines or other hire vehicles tended to be somewhat longer, with just 9% of trips in Sydney using this form of transport being estimated as under 10km, and nearly half were estimated as 25km+.

Figure 44: Last trip – Estimated length Q55



Reason for Choice of Vehicle Type

Taxis were chosen for the last trip most commonly because of availability and convenience – and outside of Sydney in the absence of other options. Rideshare was used for similar reasons of availability and convenience – but by far the number one reason was being cheaper than the alternatives. Limousines and other hire vehicles were used outside of Sydney because they were more reliable than other alternatives.

Figure 45: Reasons for using a taxi for the most recent trip Q40

Reasons for using a taxi for last trip	Sydney	Other Urban	Rest of NSW
Quicker or more direct, it was there	**36%**	**26%**	17%
Convenience (Parking / Luggage / Weather / Drinking / App)	**31%**	**27%**	**29%**
Cheaper than alternatives	5%	4%	3%
More reliable than alternatives	6%	7%	2%
Makes different types of vehicle available (van, ute, maxi taxi or luxury car)	2%	0%	0%
I didn't have access to any other transport options/I missed the bus	16%	**30%**	**43%**
Another reason	1%	1%	0%
Work-related	1%	1%	0%
Pre-booked by someone else	0%	0%	0%
To/from train station/airport	1%	2%	1%
Injury / poor vision / travelling with disabled person	1%	1%	4%
Safety / late at night	0%	0%	0%
Sample size	*719*	*151*	*126*

Base = Used transport in the last 6 months

Figure 46: Reasons for using rideshare for the most recent trip Q40

Reasons for using rideshare for last trip	Sydney	Other Urban	Rest of NSW
Quicker or more direct, it was there	24%	24%	15%
Convenience (Parking / Luggage / Weather / Drinking / App)	22%	14%	23%
Cheaper than alternatives	**30%**	**43%**	**50%**
More reliable than alternatives	13%	11%	4%
Makes different types of vehicle available (van, ute, maxi taxi or luxury car)	1%	3%	0%
I didn't have access to any other transport options/I missed the bus	7%	5%	4%
Another reason	0%	0%	4%
Work-related	1%	0%	0%
Pre-booked by someone else	1%	0%	0%
To/from train station/airport	0%	0%	0%
Injury / poor vision / travelling with disabled person	0%	0%	0%
Safety / late at night	0%	0%	0%
Sample size	*499*	*37*	*26**

Base = Used transport in the last 6 months

Figure 47: Reasons for using a limousine or other hire vehicle for the most recent trip Q40

Reasons for using a limousine or other hire vehicle for last trip	Sydney	Other Urban	Rest of NSW
Quicker or more direct, it was there	23%	5%	13%
Convenience (Parking / Luggage / Weather / Drinking / App)	20%	**25%**	13%
Cheaper than alternatives	10%	5%	13%
More reliable than alternatives	21%	**35%**	**38%**
Makes different types of vehicle available (van, ute, maxi taxi or luxury car)	13%	0%	0%
I didn't have access to any other transport options/I missed the bus	4%	20%	13%
Another reason	1%	0%	0%
Work-related	0%	0%	0%
Pre-booked by someone else	4%	10%	13%
To/from train station/airport	4%	0%	0%
Injury / poor vision / travelling with disabled person	0%	0%	0%
Safety / late at night	0%	0%	0%
Sample size	*71*	*20**	*8**

Base = Used transport in the last 6 months

Aggregating reasons together across all forms of transport (see the table below), it is apparent that availability, convenience and lack of alternatives were the most commonly cited reasons for the choice of vehicle type on the most recent trip.

Figure 48: Reasons for choosing whatever type of transport was used for the most recent trip Q40

Reasons for choosing whichever type of vehicle used for last trip	Sydney	Other Urban	Rest of NSW
Quicker or more direct, it was there	**31%**	*24%*	17%
Convenience (Parking / Luggage / Weather / Drinking / App)	**27%**	***25%***	**28%**
Cheaper than alternatives	15%	*11%*	11%
More reliable than alternatives	9%	*11%*	4%
Makes different types of vehicle available (van, ute, maxi taxi or luxury car)	2%	*0%*	0%
I didn't have access to any other transport options/I missed the bus	12%	***25%***	**35%**
Another reason	1%	*0%*	1%
Work-related	1%	*0%*	0%
Pre-booked by someone else	1%	*1%*	1%
To/from train station/airport	1%	*1%*	1%
Injury / poor vision / travelling with disabled person	1%	*1%*	3%
Safety / late at night	0%	*0%*	0%
Sample size	*1289*	*208*	*160*

Base = Used transport in the last 6 months

Obtaining a Vehicle

The bulk of taxis are obtained through a combination of rank and hail, and by phoning taxi companies. In Sydney respondents reported that 81% of last taxis were obtained in one of these ways, with more than half (56%) being by rank and hail. Outside of Sydney the proportions switch to be more dominantly from telephone, with hailing in particular declining to a negligible contribution.

Rideshare is almost exclusively obtained by smartphone apps (three quarters of all last rideshares were obtained this way) or by an internet booking.

The relatively small number of last trips that were by limousines and other hire vehicles were mostly obtained by phone or internet bookings, or by contacting a driver directly.

Figure 49: Last trip – Method of obtaining vehicle Q41

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

Last trip – Method of obtaining vehicle	**Taxi**			**Rideshare**			**Limousines or other hire vehicle services**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*719*	*151*	*126*	*499*	*37*	*26**	*71*	*20**	*8**
At a taxi **rank**	**34%**	**33%**	**22%**						
Hailed/waved down on the street	**22%**	5%	2%						
Rank and **Hail**	**56%**	**38%**	**25%**						
Phoned a **taxi** company	**25%**	**52%**	**66%**						
Rank and **Hail + Phone taxi company**	**81%**	**89%**	**90%**						
By **calling** a **phone number**				3%	3%	12%	**25%**	45%	50%
By **internet** booking	8%	4%	2%	13%	16%	19%	**23%**	30%	0%
Contacted a **driver directly**	5%	3%	2%	2%	0%	0%	**25%**	5%	25%
Had a **regular booking**	1%	0%	1%	2%	3%	0%	3%	0%	0%
Used a **smartphone application** (app)	4%	2%	2%	**77%**	**73%**	65%	3%	5%	0%
Some other way	1%	1%	3%	0%	0%	0%	3%	5%	0%
I'm not sure because someone else organised it	1%	0%	1%	3%	5%	4%	18%	10%	25%

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

In Sydney booked taxis were equally likely to have been pre-booked or ASAP / next available bookings. Outside Sydney, taxis were predominantly ASAP bookings – as were rideshare in all locations. Limousines and other hire vehicles were predominantly pre-booked.

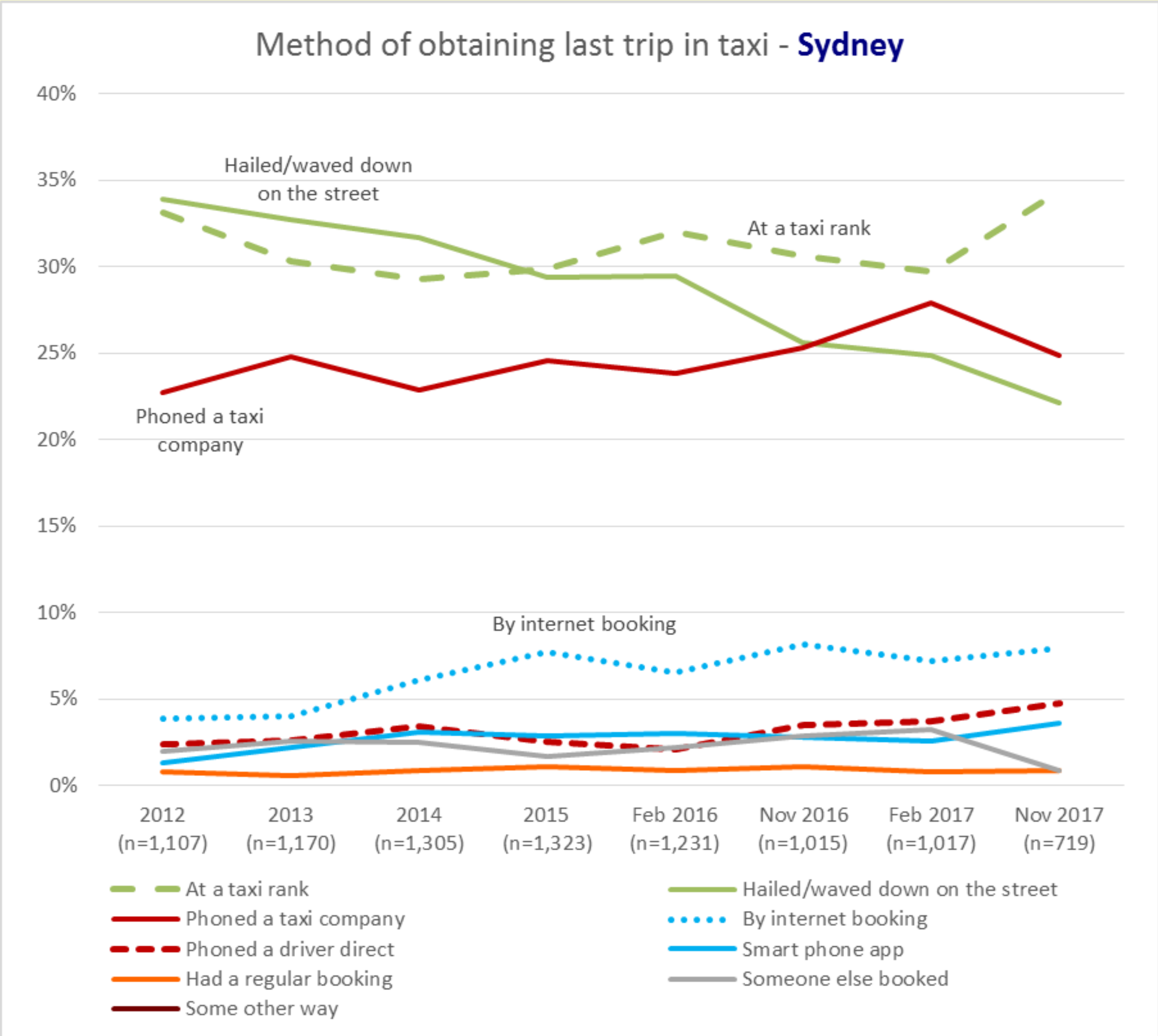
Figure 50: Last trip – Method of obtaining vehicle Q48

Last trip – Type of booking	**Taxi**			**Rideshare**			**Limousines or other hire vehicle services**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*296*	*92*	*89*	*477*	*34*	*25**	*54*	*17**	*6**
ASAP (as soon as possible / next available)	53%	**82%**	**73%**	**88%**	**88%**	92%	4%	0%	17%
Pre-booked (for a particular time)	47%	18%	27%	12%	12%	8%	**96%**	100%	83%

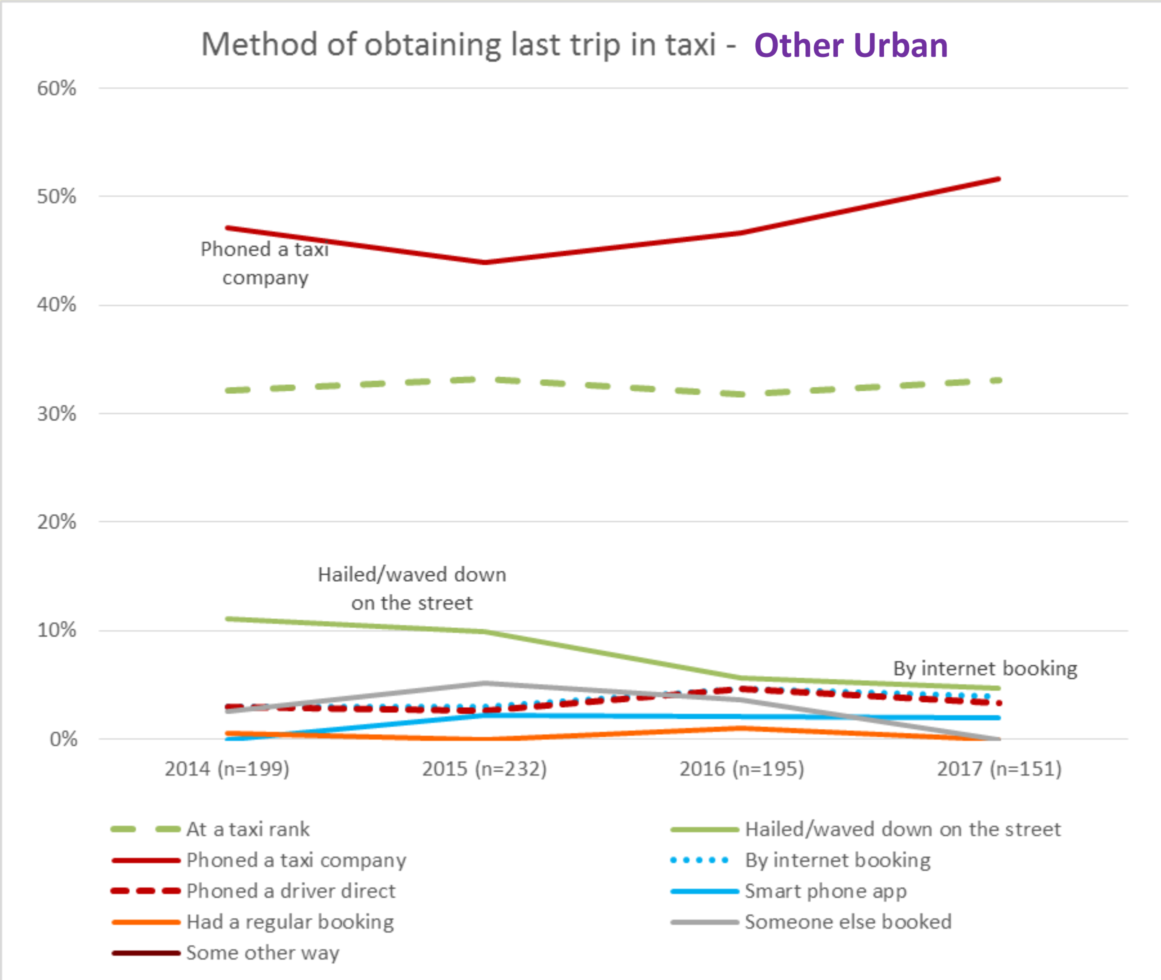
Comparison to previous years

The data on methods of obtaining the last taxi should be largely comparable to previous years, as there was minimal variation in the way this data was collected.

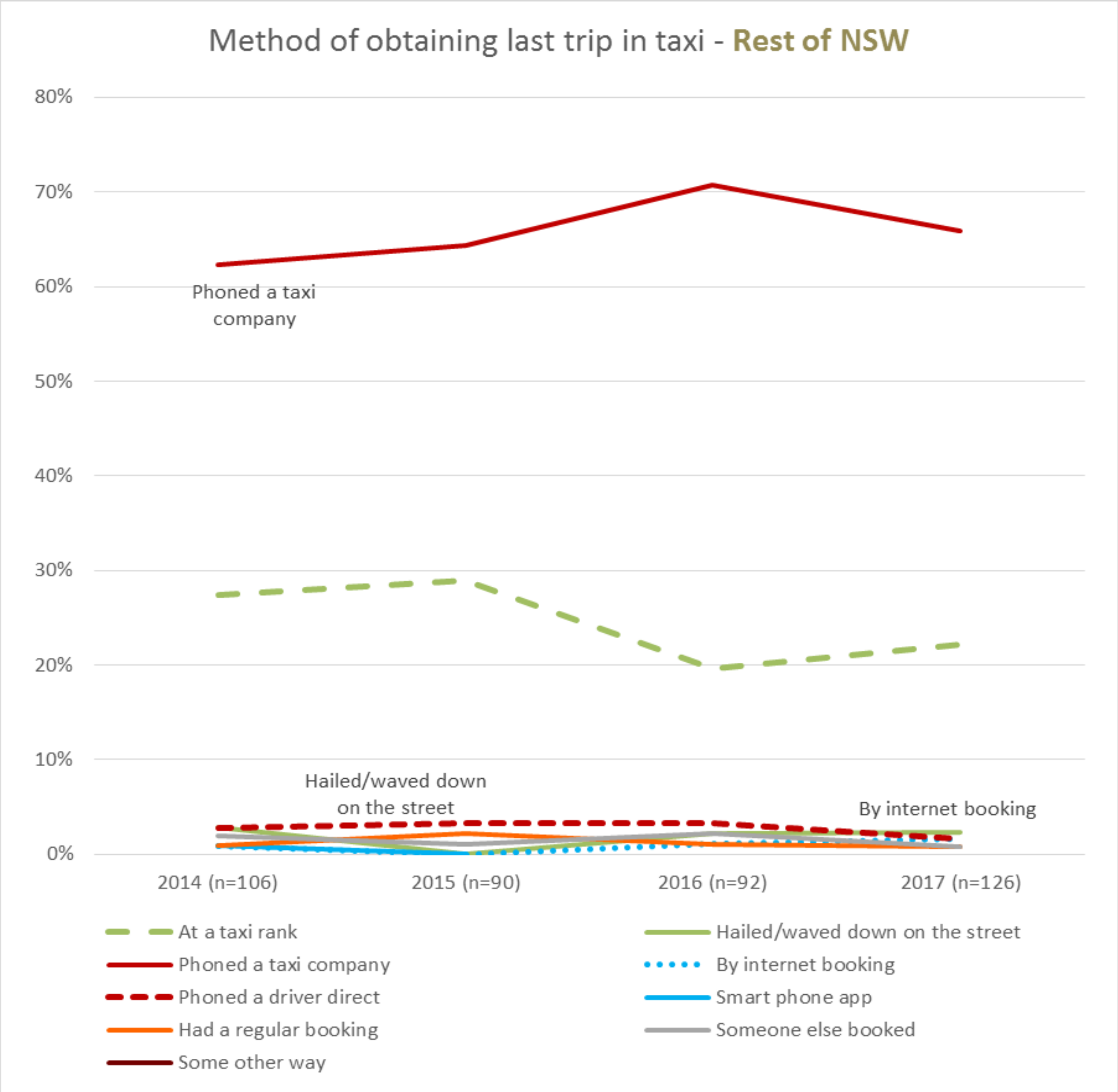
It shows that the three dominant methods of obtaining taxis in Sydney remain rank, hail and phoning a taxi company. Over the past few surveys use of ranks has become somewhat more common than hailing taxis in the streets, and this trend has continued in the current data. Internet bookings are slowly becoming more prevalent, but still continue to be reported by less than 1-in-10 users as the method of obtaining their last trip.



In Other Urban areas phoning a taxi company remains clearly the most common method, with ranks being clearly the second most common method. Hailing taxis is much less common in these areas than in Sydney, but the trend over the last few years has also been for hailing to decline further.



In the rest of NSW taxis are obtained almost exclusively by phoning a taxi company (which accounts for about two thirds of last trips) or by using ranks. All other methods combined make up just a fraction of last trips. Reported use of ranks appears to have declined in 2016-17.



Awareness of service provider

More than half of all respondents whose most recent trip was in a taxi were not aware of the service provider, and naturally this was lower again for rank and hail than for booked taxis. For booked taxis, around 2-in-5 respondents thought they could remember the service provider. Only 12% of those who had used rank or hail in Sydney were confident they knew the provider's name – though this was a little higher outside of Sydney (23%-33%). A variety of taxi companies were identified by respondents, including specific local companies in some instances.

Users of rideshare were much more likely to be aware of the provider, with 76%-79% saying they knew the provider and up to another 6% who thought they did. This was overwhelmingly Uber, cited by 98% in Sydney and 93% in Other Urban (and by 95% of the very small group of users in the rest of NSW).

Very few of the small group of users of limousines or other hire vehicles were aware of who the service provider was.

Figure 51: Last trip – Awareness of service provider Q41

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

Last trip – Awareness of service provider	Taxi					
Base: Used the type of transport in the last 6 months AND method of obtaining last vehicle	**Sydney** Rank & Hail	**Sydney** Booked	**Other Urban** Rank & Hail	**Other Urban** Booked	**Rest of NSW** Rank & Hail	**Rest of NSW** Booked
Sample size	*406*	*262*	*57*	*87*	*31*	*87*
Aware	12%	44%	33%	44%	23%	38%
"Think so"	5%	5%	5%	3%	3%	5%
Not aware	**83%**	**51%**	**61%**	**53%**	**74%**	**57%**

	Rideshare			Limousines or other hire vehicle services		
	Sydney	**Other Urban**	**Rest of NSW**	**Sydney**	**Other Urban**	**Rest of NSW**
Sample size	*466*	*34*	*25**	*36*	*16**	*4**
Aware	**79%**	**76%**	76%	8%	31%	25%
"Think so"	2%	6%	0%	0%	6%	0%
Not aware	19%	18%	24%	**92%**	63%	75%

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

Consideration of booking when using rank and hail

Around 1-in-4 to 1-in-5 respondents whose most recent trip was a rank or hail taxi did at least consider calling or booking a vehicle too. The sample for outside of Sydney is much smaller, but suggests that this may be slightly more common beyond the capital.

Figure 52: 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:	17%	23%	26%
Sample size	*406*	*57*	*31*

Base = Used Rank or Hail taxi for the last trip

Within Sydney, clearly the most common reason for not calling or booking a vehicle after considering doing so was the immediate access to a taxi by rank or hail. Beyond this immediate availability, the two most common other reasons were not expecting a booked taxi to be any faster, or not wanting to pay a booking fee.

Even amongst the small sample of cases outside of Sydney, these same three reasons appeared indicatively to be the most prevalent.

Figure 53: 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	57%	31%	38%
Didn't think a booked taxi would arrive any faster	23%	46%	25%
Did not want to pay a booking fee	16%	23%	38%
Didn't have access to a phone or the internet to make a booking	7%	15%	13%
Wanted to be anonymous	4%	-	-
Something else	4%	-	-
Didn't know how to book a taxi or other vehicle	1%	8%	-
Sample size	*69*	*13**	*8**

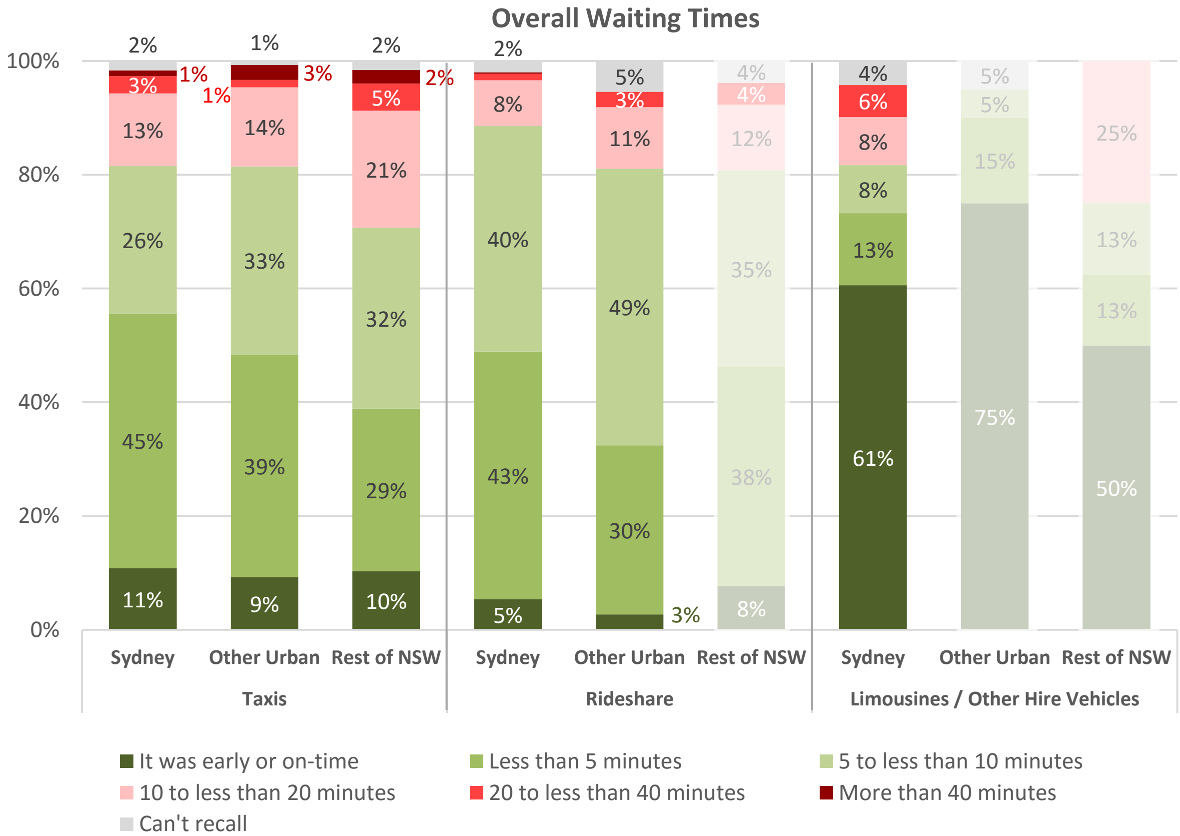
Base = Used Rank or Hail taxi for the last trip AND considered calling or booking transport

Waiting Time

Overall around 4-in-5 respondents got their vehicle within 10 minutes on their last trip. Reported waiting times were slightly longer outside of Sydney.

Figure 54: Overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52

Last trip – Overall Waiting Time	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*719*	*151*	*126*	*499*	*34*	*26**	*71*	*20**	*8**
It was **early** or **on-time** *(pre-booked only)*	11%	9%	10%	5%	3%	8%	61%	75%	50%
Less than 5 minutes	45%	39%	29%	43%	30%	38%	13%	15%	13%
Within 5 minutes	**56%**	**48%**	**39%**	**49%**	**32%**	**46%**	**73%**	**90%**	**63%**
5 to less than 10 minutes	26%	33%	32%	40%	49%	35%	8%	5%	13%
Within 10 minutes	**82%**	**81%**	**71%**	**89%**	**81%**	**81%**	**82%**	**95%**	**75%**
10 to less than 20 minutes	13%	14%	21%	8%	11%	12%	8%	0%	25%
20 to less than 40 minutes	3%	1%	5%	1%	3%	4%	6%	0%	0%
More than 40 minutes	1%	3%	2%	0%	0%	0%	0%	0%	0%



Base = Last trip within last 6 months [Sydney n=71-719; Other Urban n=20-151; Rest of NSW n=8-126]

Detailed waiting times by method of obtaining vehicles

While there was little overall difference in the waiting times reported for taxis and rideshare, in rideshare's core category of ASAP booking, rideshare users did report shorter wait times (especially in Sydney where 91% of rideshare users reported a wait time less than 10 minutes, compared to 59% of taxi users).

Figure 55: Detailed waiting times by methods of obtaining a vehicle Q46/47/50/52

Last trip – Overall Waiting Time	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Rank									
Less than 5 minutes	70%	76%	61%						
5 to less than 10 minutes	20%	16%	29%						
10 to less than 20 minutes	8%	4%	7%						
20 to less than 40 minutes	1%	0%	0%						
More than 40 minutes	0%	2%	4%						
Can't recall	*0%*	*2%*	*0%*						
Sample	*247*	*50*	*28**						
Hail									
Less than 5 minutes	66%	43%	33%						
5 to less than 10 minutes	25%	57%	0%						
10 to less than 20 minutes	7%	0%	33%						
20 to less than 40 minutes	1%	0%	33%						
More than 40 minutes	0%	0%	0%						
Can't recall	*1%*	*0%*	*0%*						
Sample	*159*	*7**	*3**						
ASAP Booking									
Less than 5 minutes	12%	23%	17%	48%	37%	39%	0%	0%	0%
5 to less than 10 minutes	47%	47%	46%	43%	47%	39%	50%	0%	0%
10 to less than 20 minutes	29%	24%	29%	8%	13%	13%	50%	0%	100%
20 to less than 40 minutes	6%	3%	6%	0%	0%	4%	0%	0%	0%
More than 40 minutes	1%	4%	2%	0%	0%	0%	0%	0%	0%
Can't recall	*4%*	*0%*	*0%*	*1%*	*3%*	*4%*	*0%*	*0%*	*0%*
Sample	*158*	*75*	*65*	*421*	*30*	*23**	*2**	*0**	*1**
Pre-Booking									
Early or on time	54%	82%	52%	42%	20%	100%	80%	88%	80%
Less than 5 minutes	14%	0%	20%	22%	0%	0%	6%	6%	0%
5 to less than 10 minutes	13%	12%	4%	22%	60%	0%	6%	0%	0%
10 to less than 20 minutes	9%	6%	16%	11%	0%	0%	4%	0%	20%
20 to less than 40 minutes	5%	0%	4%	3%	20%	0%	4%	0%	0%
More than 40 minutes	3%	0%	0%	0%	0%	0%	0%	0%	0%
Can't recall	*2%*	*0%*	*4%*	*0%*	*0%*	*0%*	*2%*	*6%*	*0%*
Sample	*144*	*17**	*25**	*64*	*5**	*2**	*54*	*17**	*5**

Waiting time estimates

Waiting time estimates are nearly ubiquitous for ASAP booked rideshares, and for the dominant Uber service are an automated feature of the booking process.

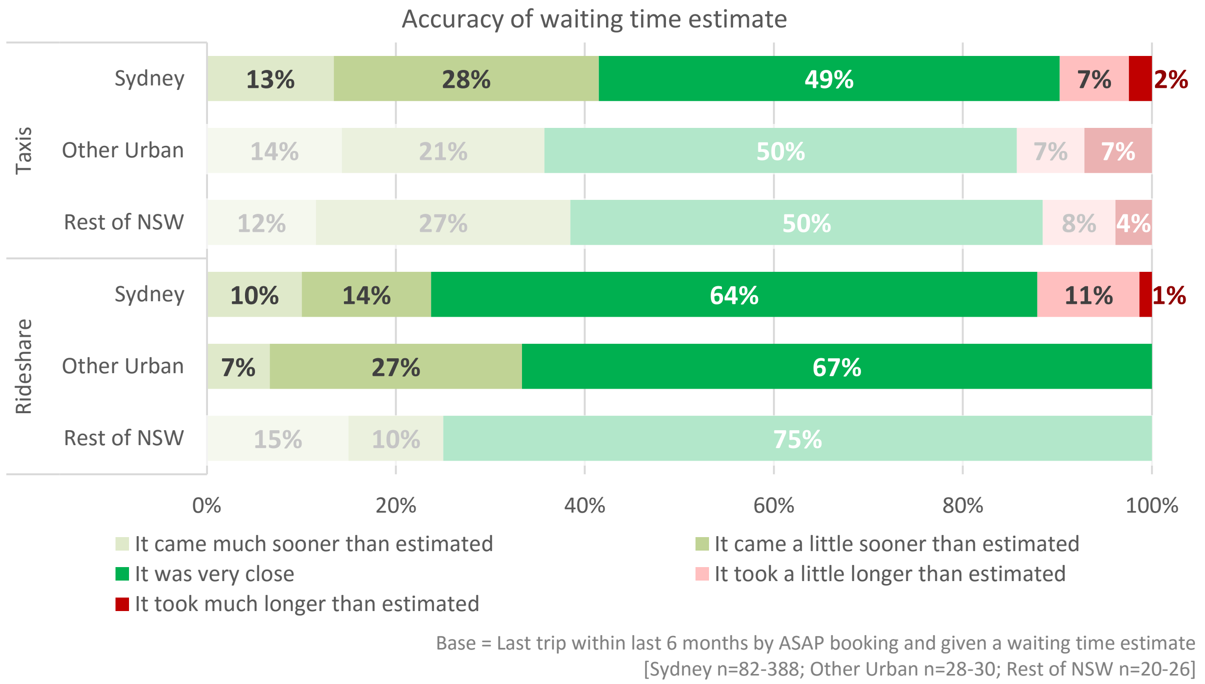
For taxis, providing waiting time estimates is far less widespread, though still quite common. Around half of the respondents from Sydney who had booked an ASAP taxi recalled being given an estimate, and slightly fewer outside of Sydney (37%-40%).

Figure 56: Last trip – Prevalence of being given a waiting time estimate for ASAP bookings Q49

Last trip – Given waiting time estimate	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*158*	*75*	*65*	*421*	*30*	*23**	*2**	*0**	*1**
Yes	52%	37%	40%	92%	100%	87%	100%	-	100%
No	34%	47%	34%	2%	0%	9%	0%	-	0%
Can't recall	*14%*	*16%*	*26%*	*7%*	*0%*	*4%*	*0%*	*-*	*0%*

Waiting time estimates were typically either considered quite accurate, or the vehicle actually arrived sooner than estimated. Only small proportions of those given waiting time estimates by either taxis or rideshare services reported the vehicle being longer than estimated, and very few that it took *much longer than estimated* (1%-2%). The survey results suggest that rideshare waiting time estimates are perceived by users as somewhat more accurate than those for taxis.

Figure 57: Last trip – Accuracy of waiting time estimate for ASAP bookings Q53

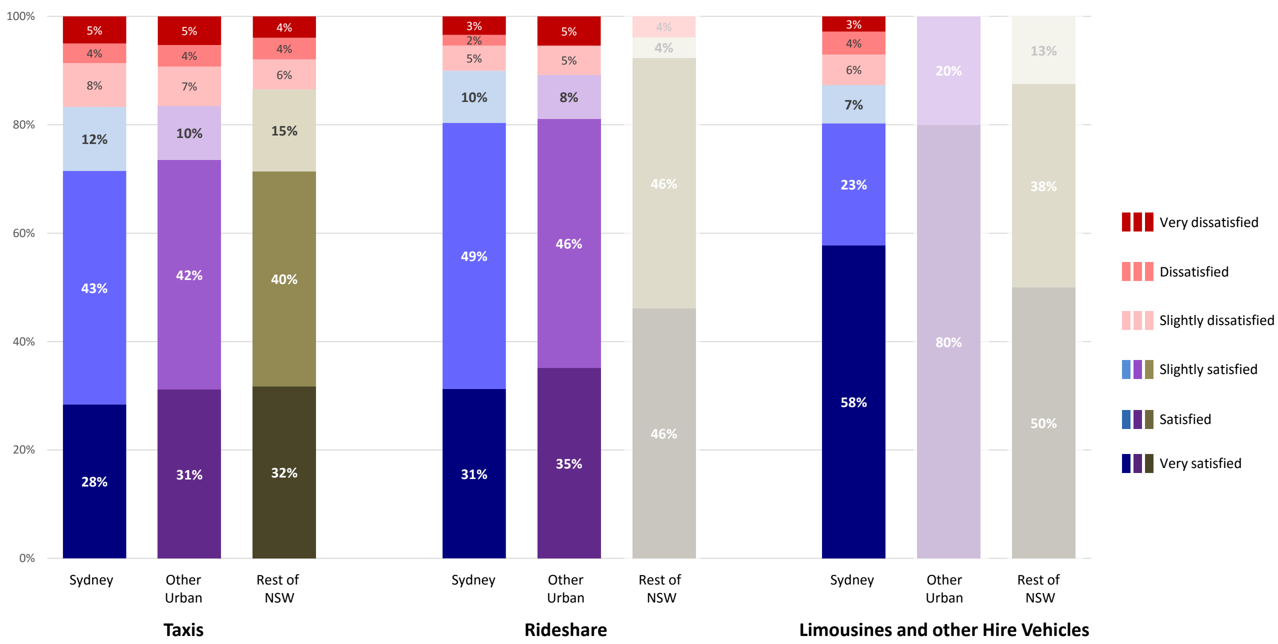


Satisfaction with waiting times

Satisfaction with waiting times was strong (83%-100%) and fairly consistent across locations and types of transport service, though there were some small variations.

- Satisfaction with rideshare was slightly higher than with taxis.
- Satisfaction was slightly higher from respondents in the rest of NSW.

Figure 58: Last trip – Satisfaction with waiting time Q54



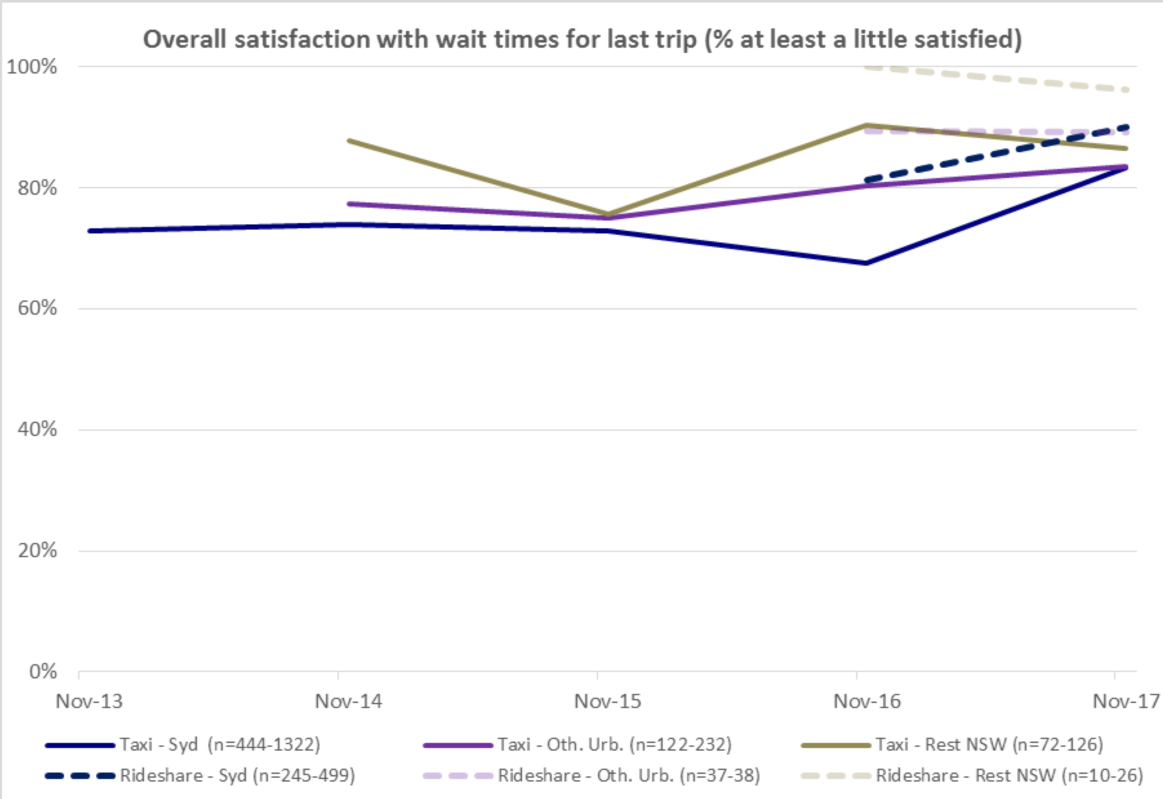
Last trip – Waiting Time Satisfaction	**Taxi**			**Rideshare**			**Limousines or other hire vehicle services**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*719*	*151*	*126*	*499*	*37*	*26**	*71*	*20**	*8**
Very Satisfied	28%	31%	32%	31%	35%	46%	58%	80%	50%
Satisfied	43%	42%	40%	49%	46%	46%	23%	20%	38%
Slightly satisfied	12%	10%	15%	10%	8%	4%	7%	0%	13%
Total Satisfied	**83%**	**83%**	**87%**	**90%**	**89%**	**96%**	**87%**	**100%**	**100%**
Slightly dissatisfied	8%	7%	6%	5%	5%	0%	6%	0%	0%
Dissatisfied	4%	4%	4%	2%	0%	4%	4%	0%	0%
Very dissatisfied	5%	5%	4%	3%	5%	0%	3%	0%	0%
Total Dissatisfied	**17%**	**17%**	**13%**	**10%**	**11%**	**4%**	**13%**	**0%**	**0%**

There is some indication that Sydney respondents were the least tolerant of waiting times. Even for vehicles that were early or on time, Sydney respondents gave slightly lower average satisfaction scores (5.3, where 1.0 is the lowest and 6.00 is the highest) compared to regional city respondents (5.6) or those in the rest of NSW (5.7). This pattern continued for all waiting time durations – for example, at 20-40 minutes the average satisfaction ratings were 2.8/6 for Sydney, 3.0/6 for Other Urban, and 3.1/6 for the rest of NSW.

Comparison with previous years

Results for waiting time satisfaction with the last trip from the new 2017 survey should be broadly comparable with previous years.

The results shown below show both taxi and rideshare users in Sydney reporting a higher level of satisfaction in 2017 compared to previous years. Satisfaction in the Other Urban areas and the rest of NSW were not substantially different to the previous survey, especially allowing for the small sample sizes involved.



Fares

Reported fares are higher in Sydney than outside of Sydney. For both taxis and rideshare, where there are sufficient sample sizes to compare, substantially higher proportions of respondents paid less than $20 for their last fare by either service.

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

Figure 59: Last trip – Fares paid Q59

Last trip – Fares Paid	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*719*	*151*	*126*	*499*	*37*	*26**	*71*	*20**	*8**
Less than $10 Category 1	3%	9%	14%	10%	14%	12%	1%	0%	0%
At least $10 and less than $20 Category 2	18%	38%	37%	33%	54%	38%	1%	5%	25%
Less than $20	**21%**	**47%**	**51%**	**43%**	**68%**	**50%**	3%	5%	25%
At least $20 and less than $30 Category 3	20%	25%	19%	20%	11%	23%	1%	0%	13%
At least $30 and less than $40 Category 4	15%	7%	6%	10%	8%	0%	6%	0%	0%
Less than $40	**56%**	**79%**	**75%**	**73%**	**86%**	**73%**	10%	5%	38%
At least $40 and less than $60 Category 5	11%	5%	9%	8%	5%	8%	6%	5%	13%
At least $60 and less than $100 Category 6	14%	3%	2%	6%	5%	4%	25%	30%	13%
At least $100 and less than $150 Category 7	5%	0%	0%	1%	0%	0%	25%	10%	0%
$150 or more Category 8	1%	0%	2%	0%	0%	0%	15%	35%	13%
$40 or more	**31%**	**9%**	**13**	**15%**	**11%**	**12%**	72%	80%	38%
I'm not sure because someone else paid	*4%*	*7%*	*4%*	*4%*	*3%*	*4%*	*10%*	*10%*	*25%*
Can't recall	*9%*	*5%*	*8%*	*7%*	*0%*	*12%*	*8%*	*5%*	*0%*

Respondents perceived value for money to be a relative strength of rideshare compared to taxis, and this seems somewhat supported by the reported fares paid. In Sydney just 21% of respondents who used a taxi for their last trip reported paying less than $20 compared to 43% of rideshare users; and 56% paid less than $40 compared to 73%. Similar patterns were observed outside of Sydney.

This pattern could be accounted for by rideshare being used for shorter trips, and so a further breakdown of fares by distance was examined. Sample sizes were small within individual distance categories, but in Sydney where there were larger total samples, a clear pattern emerged for respondents who had used rideshare to indicate a lower fare was paid for the same distance category.

Average fare x distance	Taxis	Rideshare
Range: Min=1.0 / Max=8.0	Sydney	Sydney
Less than 5 km	2.1	1.7
5 km to under 10 km	3.1	2.4
10 km to under 15 km	4.2	3.3
15 km to under 25 km	5.3	4.1
25 km to under 50 km	6.2	5.5
50 km or more	6.4	8.0
Total Sample	*622*	*440*

Fare estimates were categories, rather than dollar values, and so the 'average' figures shown here equate to the fare bands shown in the table above.

Though not quantifiable in dollar terms, this data does clearly show that based on reported fares by estimated distance, rideshare does indeed seem more cost effective than taxis.

Figure 60: 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			
Less than $10	4%	18%	11%
At least $10 and less than $20	**17%**	**32%**	39%
At least $20 and less than $30	**18%**	**24%**	14%
At least $30 and less than $40	**13%**	6%	4%
At least $40 and less than $60	**14%**	2%	18%
At least $60 and less than $100	**19%**	6%	4%
At least $100 and less than $150	5%	0%	0%
$150 or more	0%	0%	4%
I'm not sure because someone else paid	1%	4%	4%
Can't recall	9%	8%	4%
Sample	*247*	*50*	*28**
Hail			
Less than $10	4%	0%	0%
At least $10 and less than $20	**27%**	29%	33%
At least $20 and less than $30	**25%**	57%	67%
At least $30 and less than $40	11%	0%	0%
At least $40 and less than $60	6%	0%	0%
At least $60 and less than $100	7%	0%	0%
At least $100 and less than $150	3%	0%	0%
$150 or more	1%	0%	0%
I'm not sure because someone else paid	5%	14%	0%
Can't recall	11%	0%	0%
Sample	*159*	*7**	*3**
Called taxi company			
Less than $10	2%	6%	17%
At least $10 and less than $20	**17%**	**41%**	**39%**
At least $20 and less than $30	**20%**	**24%**	**19%**
At least $30 and less than $40	15%	9%	7%
At least $40 and less than $60	10%	5%	4%
At least $60 and less than $100	15%	3%	1%
At least $100 and less than $150	3%	0%	0%
$150 or more	0%	0%	1%
I'm not sure because someone else paid	7%	9%	2%
Can't recall	11%	3%	10%
Sample	*179*	*78*	*83*
All other methods			
Less than $10	2%	0%	9%
At least $10 and less than $20	12%	44%	18%
At least $20 and less than $30	**17%**	19%	9%
At least $30 and less than $40	**22%**	6%	0%
At least $40 and less than $60	**15%**	19%	27%
At least $60 and less than $100	14%	0%	9%
At least $100 and less than $150	8%	0%	0%
$150 or more	2%	0%	0%
I'm not sure because someone else paid	4%	0%	18%
Can't recall	5%	13%	9%
Sample	*128*	*16**	*11**

Fare estimates

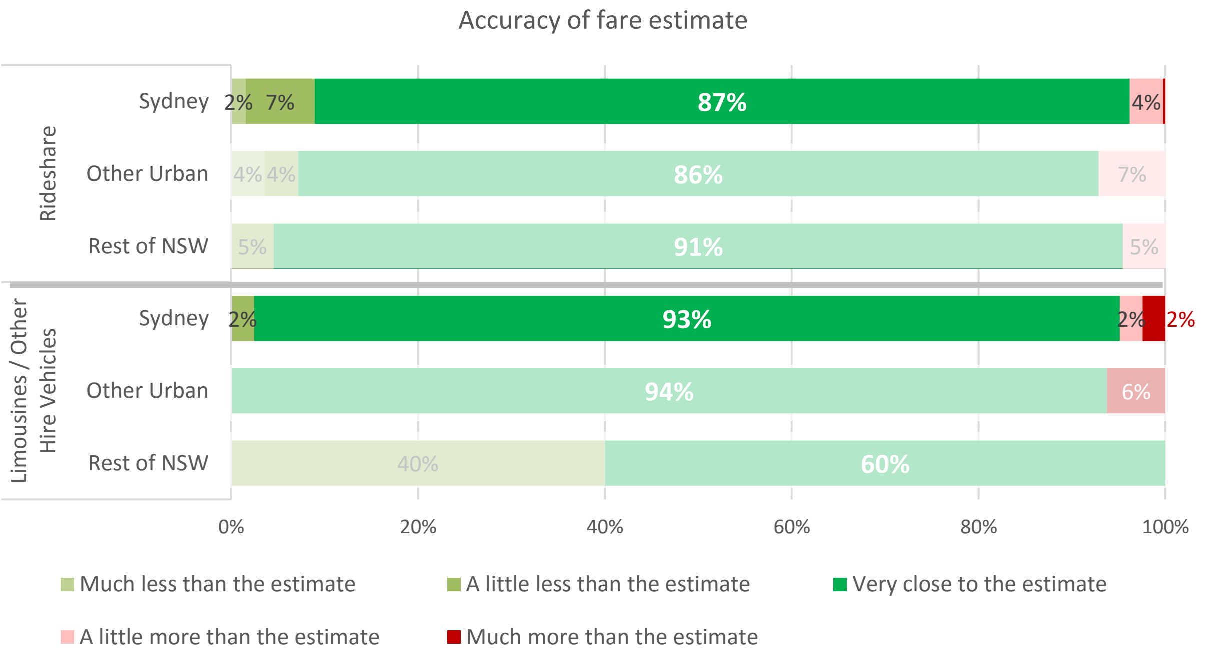
Reported levels of getting fare estimates for hire vehicles is moderately high, but not at the near ubiquitous levels seen for waiting time estimates (over 90%).

Figure 61: Last trip – Prevalence of being given a fare estimate for hire vehicle bookings Q56

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	*499*	*37*	*26**	*71*	*20**	*8**
Yes	79%	76%	85%	58%	80%	63%
No	8%	3%	12%	27%	20%	13%
Can't recall	*13%*	*22%*	*4%*	*16%*	*0%*	*25%*

While fare estimates are not quite as common, they are perceived as being more accurate. Only from Sydney were there sufficient sample sizes to interpret with some confidence, but of the rideshare users in Sydney who got a fare estimate (n=392 respondents), 87% described the final fare as *very close to the estimate*, and less than 5% as being *more than the estimate*.

Figure 62: Last trip – Accuracy of fare estimate for hire vehicle bookings Q60



Base = Last trip within 6 months by hire vehicle and given a fare estimate [Sydney n=41-392; Other Urban n=16-28; Rest of NSW n=5-22]

Comparing fares

Relatively few respondents who'd used hire vehicles reported actively comparing fares before their last trip. 19% of rideshare users in Sydney (n=499) and 30% in Other Urban (n=37) had compared prices before their trip, with 40% of the smaller groups of respondents who had used limousines or other hire vehicles (n=71 and 20 respectively) doing so.

Comparing prices on the internet or by using apps was the most common method – being used by around two-thirds 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*. Of the small group who had used a limousine or other hire vehicle and not compared prices, there is a suggestion that they were more likely to be using a regular provider.

Figure 63: Last trip – Reasons for not comparing fares Q56

Last trip – Reasons for not comparing fares	Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months AND did not compare fares before trip	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*402*	*26**	*19**	*43*	*12**	*5**
Always use provider	47%	42%	21.1%	60%	42%	80.0%
Happy with price estimate	50%	54%	63.2%	21%	33%	20.0%
Something else	11%	8%	21.1%	21%	25%	20.0%

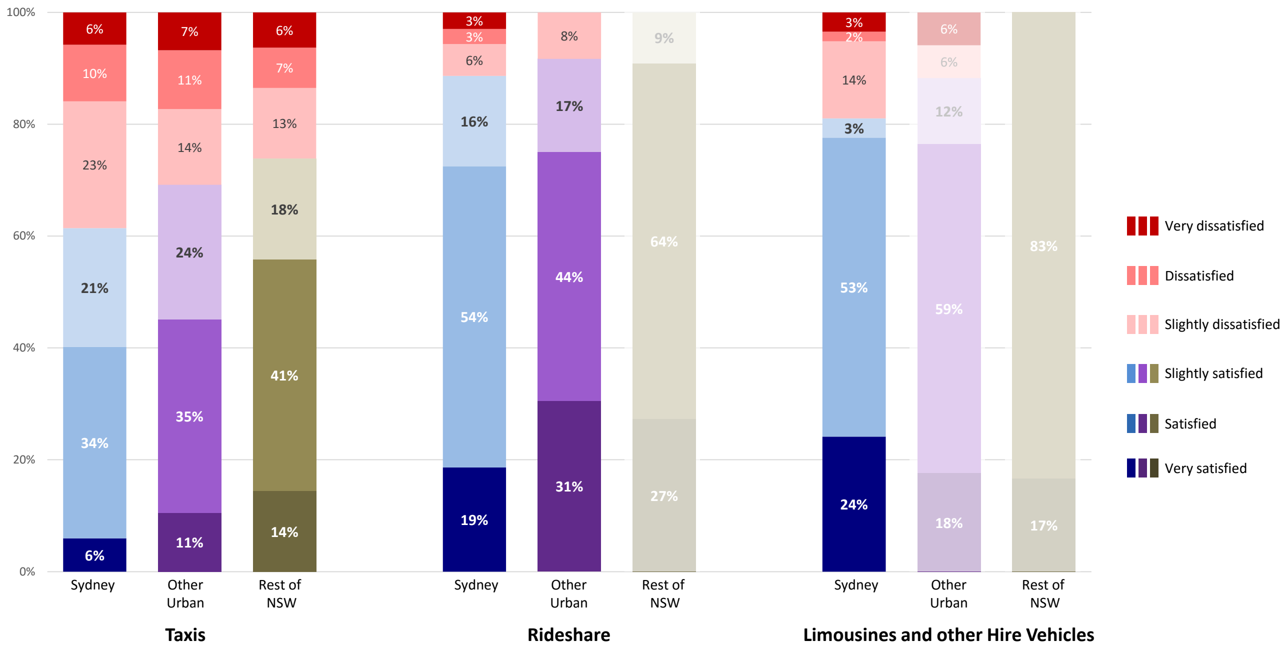
Satisfaction with fares

In line with broader perceptions of the cost and value of taxis and rideshare, users of rideshare services were much more satisfied with the fare they paid for their last trip than were users of taxis.

89% of rideshare users in Sydney described themselves as *at least slightly satisfied* with the fare they paid compared to 61% of taxi users. A similar pattern was seen in Other Urban, with 92% of rideshare users satisfied with the fare they paid compared to 69% of taxi users.

Satisfaction with fares for both taxis and rideshare was lowest in Sydney, and for taxis was highest amongst the respondents from the rest of NSW.

Figure 64: Last trip – Satisfaction with fares Q61

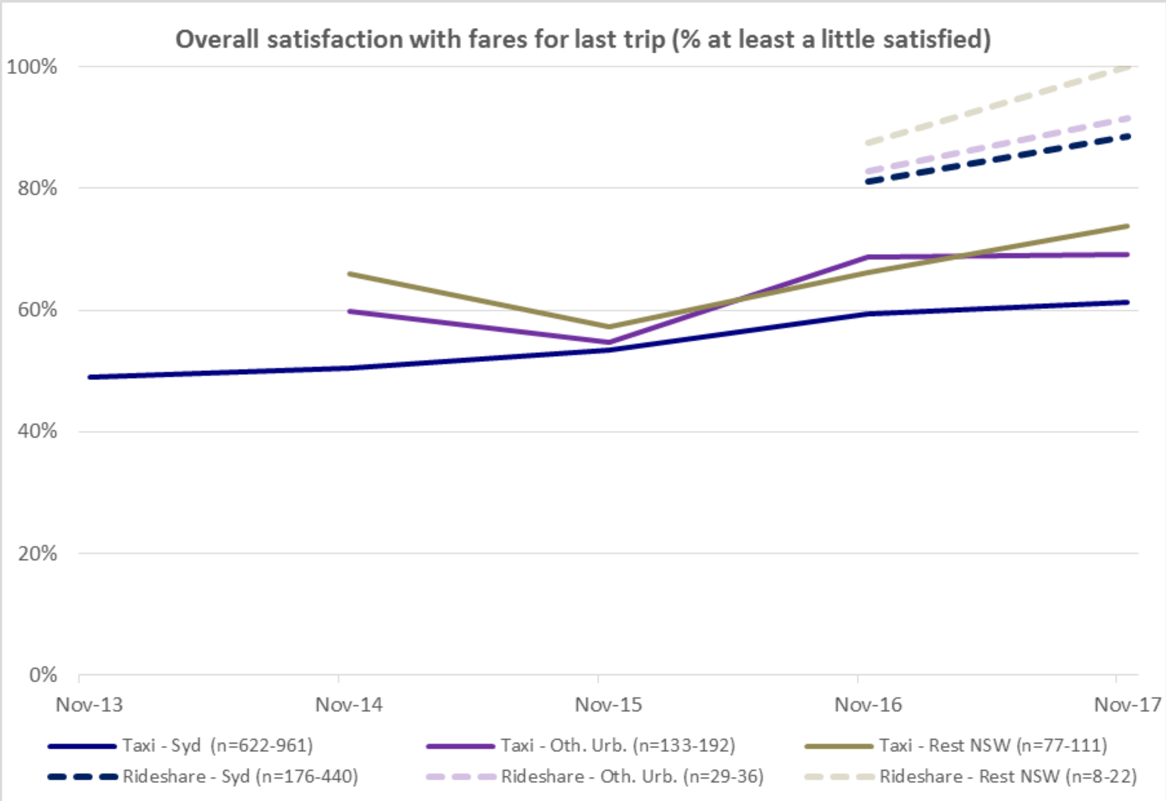


Last trip – Fare Satisfaction	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months AND aware of the amount of fare paid	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*622*	*133*	*111*	*440*	*36*	*22**	*58*	*17**	*6**
Very Satisfied	6%	11%	14%	19%	31%	27%	24%	18%	17%
Satisfied	34%	35%	41%	54%	44%	64%	53%	59%	83%
Slightly satisfied	21%	24%	18%	16%	17%	9%	3%	12%	0%
Total Satisfied	**61%**	**69%**	**74%**	**89%**	**92%**	**100%**	**81%**	**88%**	**100%**
Slightly dissatisfied	23%	14%	13%	6%	8%	0%	14%	6%	0%
Dissatisfied	10%	11%	7%	3%	0%	0%	2%	0%	0%
Very dissatisfied	6%	7%	6%	3%	0%	0%	3%	6%	0%
Total Dissatisfied	**39%**	**31%**	**26%**	**11%**	**8%**	**0%**	**19%**	**12%**	**0%**

Comparison with previous years

Results for fare satisfaction with the last trip from the new 2017 survey should be broadly comparable with previous years.

The chart below shows that there has been a gentle increase in satisfaction with taxi fares over several years, and that this appears to have continued into 2017. Satisfaction with rideshare fares was considerably higher than for taxis when first measured in 2016, and this has continued to be the case in 2017 – with satisfaction with rideshare fares increasing at a slightly higher rate than satisfaction with taxis in 2017.

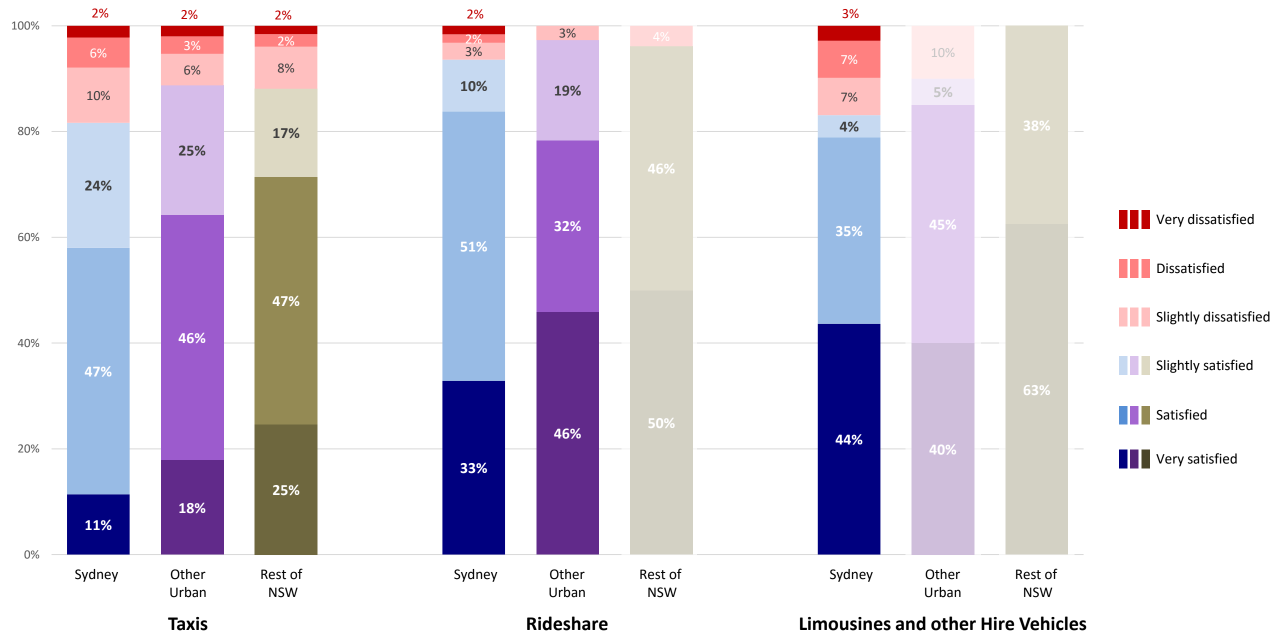


Overall Trip Satisfaction

Overall trip satisfaction closely mimics the patterns observed with fares, suggesting that the two factors are highly related in the minds of users. Rideshare users gave higher satisfaction scores than did taxi users, with those whose last trip was in a limousine or other hire care in between the two. Rideshare users were 2-3 times more likely to say they were *very satisfied* than were taxi customers in the same location.

Satisfaction with taxi services was lowest in Sydney (82% *at least slightly satisfied*) and higher in Other Urban (89%) and rest of NSW sample (88%). Rideshare users outside of Sydney were also more satisfied with their last trip than were those in Sydney.

Figure 65: Last trip – Overall Satisfaction with trip Q62



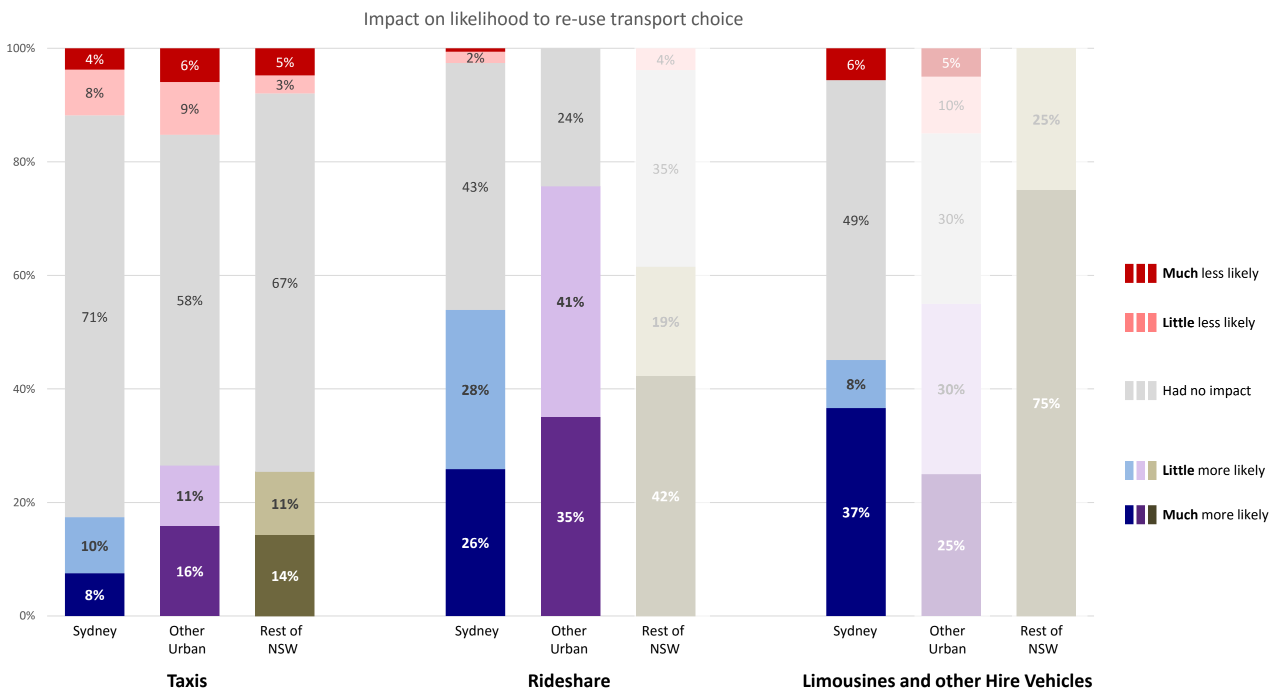
Last trip – Overall Satisfaction	**Taxi**			**Rideshare**			**Limousines or other hire vehicle services**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*719*	*151*	*126*	*499*	*37*	*26**	*71*	*20**	*8**
Very Satisfied	11%	18%	25%	33%	46%	50%	44%	40%	63%
Satisfied	47%	46%	47%	51%	32%	46%	35%	45%	38%
Slightly satisfied	24%	25%	17%	10%	19%	0%	4%	5%	0%
Total Satisfied	**82%**	**89%**	**88%**	**94%**	**97%**	**96%**	**83%**	**90%**	**100%**
Slightly dissatisfied	10%	6%	8%	3%	3%	0%	7%	10%	0%
Dissatisfied	6%	3%	2%	2%	0%	4%	7%	0%	0%
Very dissatisfied	2%	2%	2%	2%	0%	0%	3%	0%	0%
Total Dissatisfied	**18%**	**11%**	**12%**	**6%**	**3%**	**4%**	**17%**	**10%**	**0%**

Impact on intended use

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

There was a very large difference in the views of those who had used rideshare services compared to those who had used taxis. Sydney rideshare users had a nett differential of +51% compared to +6% for taxi users. In Other Urban this was even more pronounced at +76% compared to +11%, and a similar trend was observed in the small group of rideshare users in the rest of NSW sample. This may partially reflect the relative newness of the rideshare experience for users and that by virtue of newness it is still forming more permanent dispositions, whereas taxi users have had a long time to establish very concrete expectations. However, rideshare users also reported much stronger overall and fare satisfaction scores, so this impact differential does have a solid basis in their experiences.

Figure 66: Last trip – Impact on likelihood to re-use the transport service again Q63



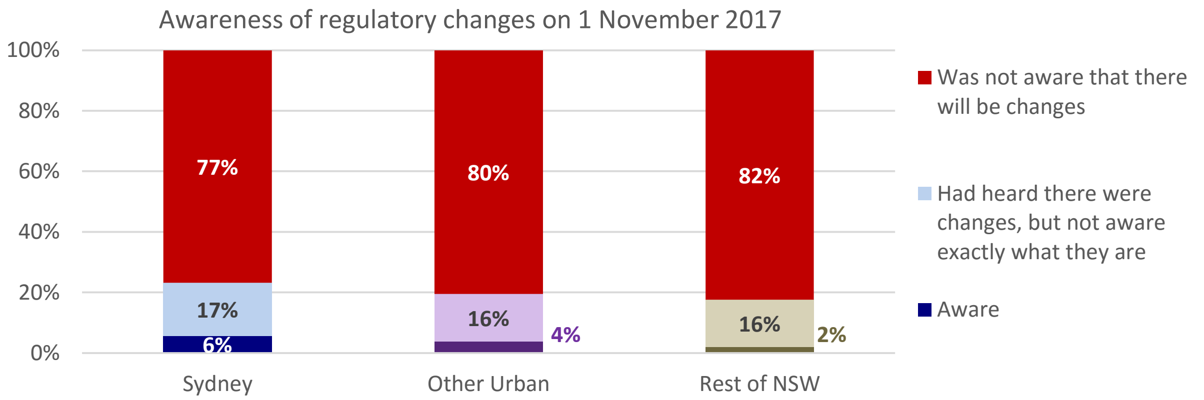
Last trip – Impact on likelihood to re-use transport service again	**Taxi**			**Rideshare**			**Limousines or other hire vehicle services**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*719*	*151*	*126*	*499*	*37*	*26**	*71*	*20**	*8**
Much more likely to use it again	8%	16%	`	26%	35%	42%	37%	25%	75%
A little more likely to use it again	10%	11%	11%	28%	41%	19%	8%	30%	25%
Total More Likely to Re-Use	**17%**	**26%**	**25%**	**54%**	**76%**	**62%**	**45%**	**55%**	**100%**
Had no impact	71%	58%	67%	43%	24%	35%	49%	30%	0%
A little less likely to use it again	8%	9%	3%	2%	0%	4%	0%	10%	0%
Much less likely to use it again	4%	6%	5%	1%	0%	0%	6%	5%	0%
Total Less Likely to Re-Use	**12%**	**15%**	**8%**	**3%**	**0%**	**4%**	**6%**	**15%**	**0%**
Differential Impact *Total MORE likely minus Total LESS likely*	**+6%**	**+11%**	**+17%**	**+51%**	**+76%**	**+58%**	**+39%**	**+40%**	**+100%**

G. Awareness of Regulatory Changes

Awareness of the regulatory changes on 1 November 2017 was very low. Only 2%-6% of respondents across the three locations said they were aware, though another 16%-17% reported that they had heard something about changes without knowing exactly what they were.

Overall, around 4-in-5 respondents across all locations indicated that they were not in any way aware that changes were planned.

Figure 67: Awareness of regulatory changes on 1 November 2017 Q69



Base = All respondents [Sydney n=2048; Other Urban n=501; Rest of NSW n=453]

Not only was awareness of any changes low, but even amongst those who thought they *had* heard something about changes, there was very little knowledge about what those changes might be. The change which had the highest level of cut through was about all providers of booked trips needing to give a fare estimate before starting the trip.

Figure 68: Regulatory changes that respondents were at least somewhat aware of Q70

	Sydney		Other Urban		Rest of NSW	
	Aware	Had heard of some changes	Aware	Had heard of some changes	Aware	Had heard of some changes
Booked trips in **taxis** no longer subject to maximum fare regulation	34%	8%	53%	5%	56%	8%
All providers of booked trips in **taxis** or **hire vehicles** have to give a fare estimate before starting a trip	**44%**	**26%**	32%	**28%**	-	**25%**
Rank and hail **taxi** trips remain subject to maximum fares set by the Government	21%	13%	16%	6%	11%	9%
Rank and hail trips can still only be undertaken by **taxis**	16%	13%	5%	8%	-	17%
None of these	18%	49%	16%	57%	33%	57%
Sample size	*117*	*358*	*19*	*79*	*9*	*71*

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

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 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 provide <u>a vehicle with a driver</u> to transport you 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. Hire vehicle services **do not** include taxis, or rental cars that you can drive yourself.

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 or Go Buggy	1	2	3
B	**Limousines** or **other hire vehicle services**	1	2	3

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

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

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

ASK ALL

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

		Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Don't know
A	**Rideshare** services (eg: Uber, Go Buggy)	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

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

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

SHOW ONLY TYPES OF TRANSPORT USED IN THE LAST 6 MONTHS

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

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

.

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

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

		Yes	No
A	**Taxis**	1	2
B	**Rideshare services** (eg: Uber, Go Buggy)	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 car sharing service such as GoGet or Car Next Door	11	11	11
Something else	12	12	12
Can't recall	13	13	13

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

PART 3: TAXIS AND HIRE VEHICLES GENERALLY

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

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

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

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

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

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

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

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

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

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

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

MULTIPLE RESPONSES ALLOWED / SHOW ONLY OPTIONS USED LESS IN Q16

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

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

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

SHOW OPTIONS AWARE OF / SHOW ALL ON ONE SCREEN

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

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

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

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

SHOW OPTIONS AWARE OF / SHOW ALL ON ONE SCREEN

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

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

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

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

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

MULTIPLE RESPONSE / SHOW ONLY OPTIONS USED IN LAST 6 MONTHS

		Pre-booking for a particular time or at least 15 minutes ahead (including regular bookings)	Booking – to come as soon as possible (including 'next available')	From a rank	By hailing in the street
A	**Taxis**	1	2	3	4
B	**Rideshare services** (eg: Uber, Go Buggy)	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 <u>booking one to come as soon as possible</u> – 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 <u>rank or by hailing it in the street</u> of…

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

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

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

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

SHOW OPTIONS USED IN LAST 12 MONTHS

	A	**B**	**C**
	Using **Taxis**	Using **Rideshare services**	Using **Limousines or other hire vehicle services**
I couldn't get one when I wanted one	1	1	1
I was overcharged	2	2	2
The driver did not take the most direct route	3	3	3
The driver did not know where they were going	4	4	4
The driver refused to take me somewhere after I told them where I was going	5	5	5
I felt unsafe because of the way the driver was driving, or the driver was breaking the road rules	6	6	6
The driver was rude, unhelpful, or offensive	7	7	7
The price during peak or surge pricing was too high	8	8	8
Something else	9	9	9
Had no problems	10	10	10

ASK IF SELECT SOMETHING ELSE CODE 9 IN Q28

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

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

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

30. The <u>last time</u> 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 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	Can't say / Don't know
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle services** (eg: Uber, Go Buggy)	1	2	3

ASK ONLY IF CODE 1 TO AT LEAST ONE IN Q32

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

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

ASK ONLY IF CODE 1 TO AT LEAST ONE IN Q32

34. Thinking about staff using **taxis** or **any rideshare, limousine or other hire vehicle** services (eg: Uber, Go Buggy)… 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) Can't say or 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**

37. Which of these best describes **where** you were picked up for that very last trip?

SINGLE RESPONSE

(1) A private home or apartment
(2) A workplace or office
(3) A shop or shopping centre
(4) A pub, club or other similar type of location
(5) In a CBD, town centre or other busy area
(6) At an event
(7) At an airport, train station or other transport connection
(8) Somewhere else: Please describe __________

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
Midnight – 6am	☐11	☐21	☐31	☐41	☐51	☐61	☐71
6am-middday	☐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

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 was the main reason you used a [INSERT TEXT: **"taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service"**] for this journey instead of other transport options?

SINGLE RESPONSE

(1) Quicker or more direct
(2) Convenience (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) Cheaper than alternatives
(4) More reliable than alternatives
(5) Makes different types of vehicle (like a van, ute or luxury car) available
(6) I didn't have access to any other transport options
(7) Another reason: *Please describe* ____________

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?
   (1) Less than $10
   (2) At least $10 and less than $20
   (3) At least $20 and less than $30
   (4) At least $30 and less than $40
   (5) At least $40 and less than $60
   (6) At least $60 and less than $100
   (7) At least $100 and less than $150
   (8) $150 or more
   (9) I'm not sure because someone else paid
   (10)Can't recall

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

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

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

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

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

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

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

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

PART 6: PERCEIVED STRENGTHS AND WEAKNESSES OF SERVICES

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

64. Do you personally think that each of the following is a strength (✓), weakness (✗) or neutral (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

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

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

ASK IF PREFERENCE FOR HIRE VEHICLES [Q65=2]

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

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

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

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

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

SINGLE RESPONSE PER **COLUMN**

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

PART 7: AWARENESS OF REGULATION CHANGES

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

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

ASK IF CODE 1-2 AT Q69

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

PART 8: OTHER DEMOGRAPHICS

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

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

72. Do you have a physical disability

SINGLE RESPONSE

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

ASK IF HAVE DISABILITY (Q70=1)

73. Can you:

SINGLE RESPONSE

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

ASK IF HAVE DISABILITY (Q70=1)

74. Do you get payment assistance for taxis from:

CODES 1 AND 2 ARE MULTIPLE RESPONSE

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

CLOSE

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

Appendix B: Sample Demographics

Targets

%
Quotas

Sydney	Male	Female	Total
16-29	13%	13%	26%
30-39	10%	10%	19%
40-49	9%	9%	18%
50-59	7%	8%	15%
60-69	5%	6%	11%
70+	5%	6%	11%
Total	49%	51%	100%

Reg City	Male	Female	Total
16-29	12%	12%	24%
30-39	7%	8%	15%
40-49	8%	9%	17%
50-59	8%	8%	16%
60-69	6%	7%	13%
70+	7%	9%	15%
Total	48%	52%	100%

Rest NSW	Male	Female	Total
16-29	11%	10%	21%
30-39	7%	7%	14%
40-49	8%	9%	17%
50-59	9%	9%	18%
60-69	8%	8%	16%
70+	7%	9%	16%
Total	49%	51%	100%

%
Actuals

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%

Variation

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

Reg City	Male	Female	Total
16-29	-6%	0%	-6%
30-39	-1%	1%	0%
40-49	1%	1%	2%
50-59	0%	1%	2%
60-69	1%	1%	2%
70+	0%	0%	1%
Total	-4%	4%	0%

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

Appendix C: Detailed Strengths and Weaknesses

Figure 69: Detailed strengths and weaknesses of transport options - Sydney Q64

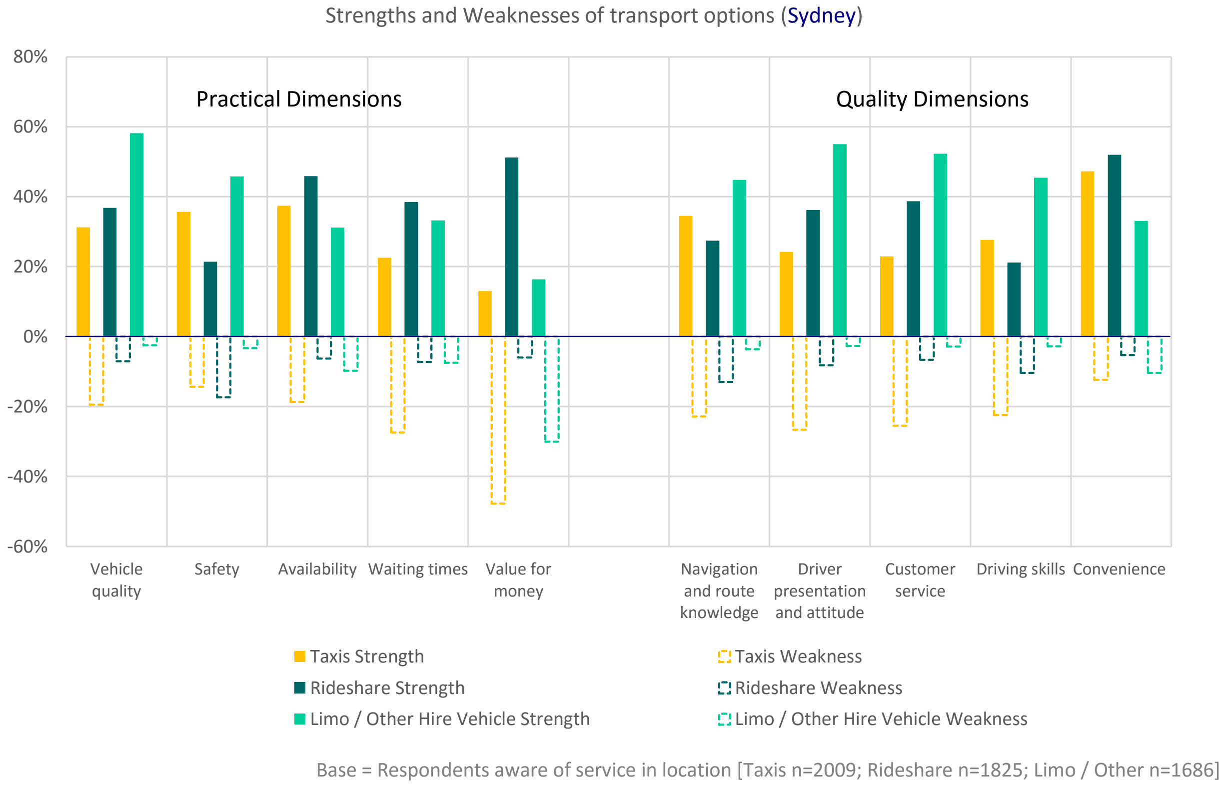


Figure 70: Detailed strengths and weaknesses of transport options - Other Urban Q64

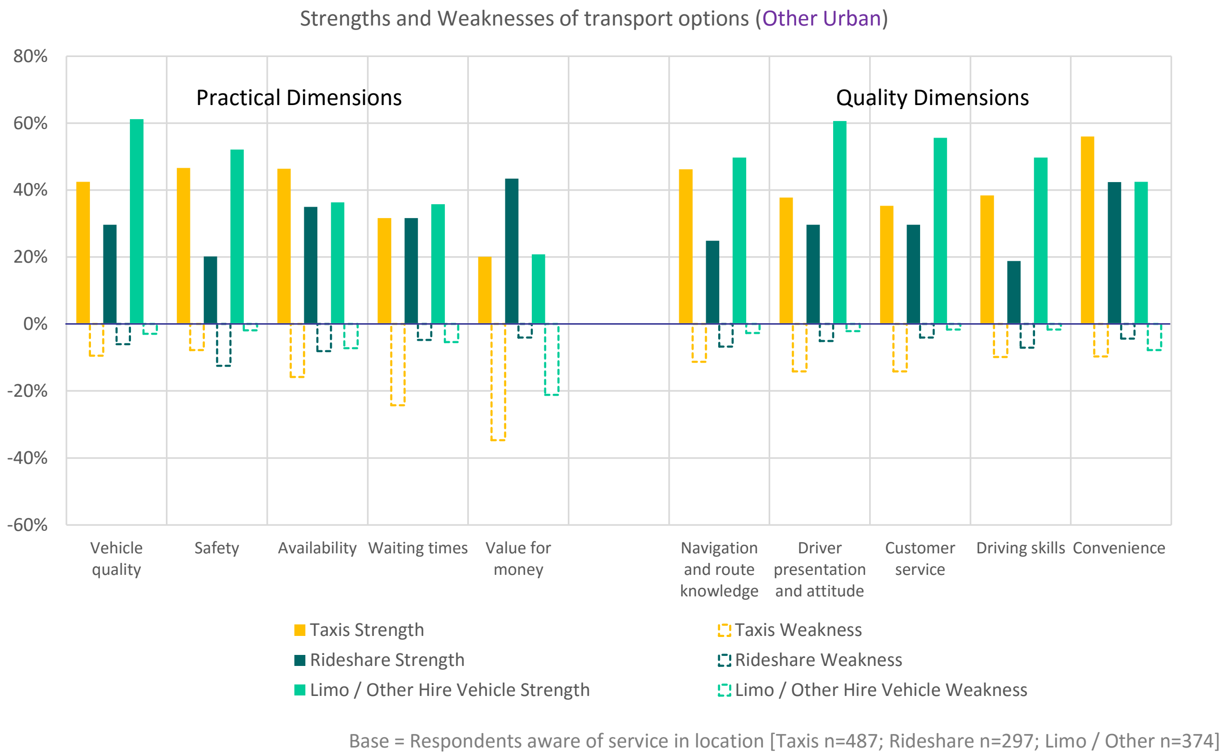
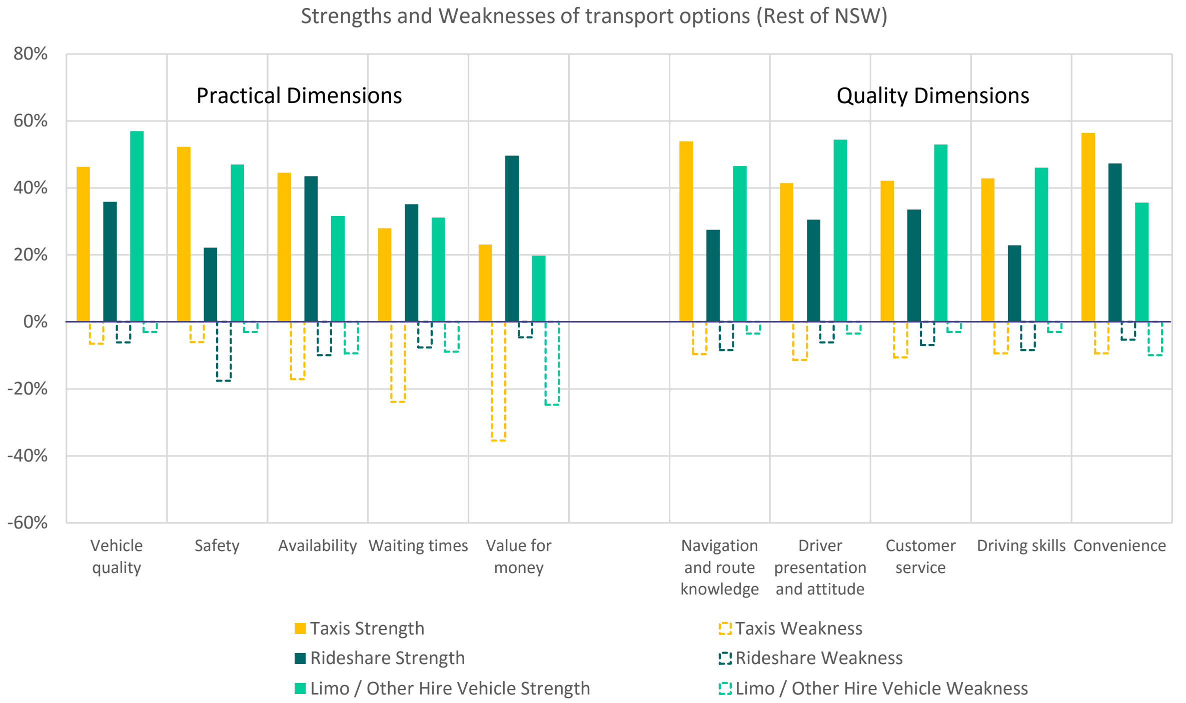


Figure 71: Strengths and weaknesses of transport options - Rest of NSW Q64



Base = Respondents aware of service in location [Taxis n=415; Rideshare n=131; Limo / Other n=202]

Appendix D: Demographic Comparisons

The following tables show the patterns and variations in responses by demographic groups across a range of questions from the survey. The tables deliberately show variations in patterns visually rather than providing detailed statistical results. Where no result is shown in a box it means that there were no statistically significant differences observed.

Key to tables

Up arrows in the tables show where results for a sub-group were statistically significantly higher than the comparison group, and down arrows indicate significantly lower results.

- All significance testing calculated at the 95% confidence level.
- Where only two levels or categories exist (eg: gender) then comparisons are against the other category. Where three or more levels exist (eg: age) then comparisons are against the overall mean result.

Different degrees of variation are shown with different formatting:

↑	↓	Shaded cells with arrows are the strongest differences. Variations shown like this are statistically significant overall AND in all three individual locations in their own right.

↑	↓	Large arrows without shading or detailed subtext shows that overall differences are statistically significant – but only when aggregated at the level of all three locations combined (ie: the differences are not significant at the level of any of the individual locations)

↑ ↓ ↓Syd ↑Oth.Urb. ↑Rest	Cells with a large arrow and smaller subtext show more nuanced differences: The top large arrow shows the overall result is significantly different in the direction indicated. The bottom row detail shows differences are statistically significant only within the locations specified. Note that the direction of difference can vary between specific locations, and this is shown by the arrows. This would mean that one or more locations has a different pattern to the others, and different even to the combined overall pattern.

↓Syd ↑Oth.Urb. ↑Rest	Small subtext only indicates that the overall result was *not* statistically significant, but that a significant difference was observed in one or more of the individual locations.

Primary Indicators		Age 16-29	Age 30-49	Age 50-69	Age 70+
Aware (in area)	Taxi	↑			↓
	Rideshare	↑ ↑Oth. Urb. ↑Rest	↑ ↑Oth. Urb. ↑Rest	↓ ↓Oth. Urb. ↓Rest	↓ ↓Oth. Urb. ↓Rest
	Limo / Other HV	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd	↑Syd
Used Taxi	*Past 6 months*	↓ ↓Syd	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
	Past month	↓ ↓Syd ↑Rest	↑ ↑Syd	↓ ↓Syd ↓Rest	↓ ↓Syd ↓Rest
Used Rideshare	*Past 6 months*	↑	↑	↓	↓
	Past month	↑	↑ ↑Syd ↓Rest	↓	↓ ↓Syd
Used Limo / Other HV	*Past 6 months*				
	Past month	↑	↑		↓
Change in use - Taxi	*More*	↑		↓	
	Less	↑ ↑Syd	↑ ↑Syd	↓ ↓Syd	↓
Change in use - Rideshare	*More*	↑	↑		↓
	Less				
Change in use - Limo / Other HV	*More*				
	Less	↑ ↑Syd ↑Oth. Urb.	↓	↓ ↓Syd ↓Oth. Urb.	
Change in Taxi usage due to use of any hire vehicle	**No longer use taxi**	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd	
	Use taxi less	↑ ↑Syd ↑Oth. Urb.	↑ ↑Syd ↓Oth. Urb.	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
Tried to use - not able to	Taxi	↑ ↑Syd ↑Rest	↑	↓	↓ ↓Syd ↓Rest
	Rideshare	↑	↑ ↑Syd	↓	↓ ↓Syd
	Limo / Other HV	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd	↓ ↓Syd
Satisfaction with service in area - Taxi	*Satisfied*	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd	↑ ↑Syd
	Dissatisfied	↑ ↓Syd	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
Satisfaction with service in area - Rideshare	*Satisfied*	↑	↑	↓	↓
	Dissatisfied	↓	↑		
Satisfaction with service in area - Limo / Other HV	*Satisfied*				
	Dissatisfied				
Overall preference	Taxi	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd	↑ ↑Syd
	Rideshare	↑	↑ ↑Syd ↓Oth. Urb.	↓	↓
	Limo / Other HV	↓ ↓Syd		↑ ↑Syd	↑ ↑Syd

Primary Indicators (continued)		Age 16-29	Age 30-49	Age 50-69	Age 70+
Value for money - Taxi	*Good*		↓Syd	↓Syd	↑Syd
	Poor	↑ ↑Syd ↑Oth. Urb.	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
Value for money - Rideshare	*Good*	↑ ↑Syd ↑Oth. Urb.	↑ ↑Syd	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
	Poor				
Value for money - Limo / Other HV	*Good*		↓ ↓Syd	↓ ↓Syd	↑ ↑Syd
	Poor	↑ ↑Syd	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
Last used service	Taxi	↓ ↓Syd ↓Oth. Urb.	↑ ↑Syd ↑Oth. Urb.	↑ ↑Syd	↑ ↑Syd ↑Oth. Urb.
	Rideshare	↑	↑	↓	↓ ↓Syd ↓Oth. Urb.
	Limo / Other HV	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd	↑ ↑Syd
Time of use	Before 10pm	↓	↓ ↓Syd ↓Rest	↑	↑ ↑Syd ↑Oth. Urb.
	After 10pm	↑	↑ ↑Syd ↑Rest	↓	↓ ↓Syd ↓Oth. Urb.
If Taxi - used rank/hail	Yes		↑		↓
Overall satisfaction	Taxi	↓Syd	↓ ↓Syd	↑	↑ ↑Syd
	Rideshare			↑Syd	↓Syd
	Limo / Other HV				

Secondary Indicators		Age 16-29	Age 30-49	Age 50-69	Age 70+
Any problems experienced over past 12 months	Taxi	↑	↑	↓ ↓Syd ↓Oth. Urb.	↓
	Rideshare	↑ ↑Syd	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
	Limo / Other HV	↑ ↑Syd	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
Strength or Weakness - Value for money	Taxi - *(Str.)*	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Oth. Urb.	↑	↑ ↑Syd ↑Oth. Urb.
	Taxi - *(Weak.)*	↑	↑	↓	↓
	Rideshare - *(Str.)*	↑ ↑Syd	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
	Rideshare - *(Weak.)*				
	Limo / Other HV - *(Str.)*	↓			↑
	Limo / Other HV- *(Weak.)*	↓	↑ ↑Syd	↓	↓ ↓Syd
Strength or Weakness - Convenience	Taxi - *(Str.)*	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Rest	↑ ↑Syd	↑
	Taxi - *(Weak.)*	↑	↑		↓
	Rideshare - *(Str.)*	↑ ↑Syd ↑Oth. Urb.	↑ ↑Syd	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
	Rideshare - *(Weak.)*	↓ ↓Syd	↑	↑ ↑Syd	↑ ↑Syd
	Limo / Other HV - *(Str.)*	↓	↓ ↓Syd ↓Oth. Urb.	↑ ↑Syd ↑Rest	↑ ↑Syd ↑Oth. Urb.
	Limo / Other HV- *(Weak.)*	↑ ↑Syd ↑Oth. Urb.	↑ ↑Syd	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd

Secondary Indicators (Continued)		Age 16-29	Age 30-49	Age 50-69	Age 70+
Strength or Weakness - Safety	Taxi - *(Str.)*	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Oth. Urb.	↑ ↑Syd	↑ ↑Syd ↑Oth. Urb.
	Taxi - *(Weak.)*	↑ ↑Syd ↑Oth. Urb.	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd ↓Oth. Urb.
	Rideshare - *(Str.)*	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd	↓ ↓Syd
	Rideshare - *(Weak.)*				
	Limo / Other HV - *(Str.)*	↓ ↓Syd		↑ ↑Syd	↑
	Limo / Other HV- *(Weak.)*	↑		↓	
Impact of rank/hail minimum fare on Taxi usage @$10	*Much less likely*	↑	↑ ↑Syd	↓ ↓Syd	↓
	Much + a little less likely	↑	↑	↓	↓

Secondary Indicators (Last trip)		Age 16-29	Age 30-49	Age 50-69	Age 70+
Methods used to obtain Taxi	*Pre-book*				
	ASAP booking				
	Rank	↓ ↓Syd	↑ ↑Syd	↑	
	Hail		↑		↓
Methods used to obtain Rideshare	*Pre-book*				
	ASAP booking				
Methods used to obtain Limo / Other HV	*Pre-book*				
	ASAP booking	↑			↓
% at least slightly satisfied with waiting times	Taxi		↓Oth. Urb.	↑Oth. Urb.	
	Rideshare				
	Limo / Other HV				
% at least slightly satisfied with fare	Taxi	↓			↑
	Rideshare				
	Limo / Other HV	↓ ↓Syd	↑ ↑Syd	↑ ↑Syd	
Compared fare before using service	Taxi				
	Rideshare				
	Limo / Other HV	↑Syd			↓Syd
Likelihood to re-use service after using for last ride (impact)	Taxi	↑ ↑Syd	↓ ↓Syd	↑ ↓Syd	↑ ↑Syd
	Rideshare				
Awareness of regulatory changes	*Aware*	↑ ↑Syd	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
	Aware + have heard	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd	

Primary Indicators		Gender: Male	Gender: Female
Aware (in area)	Taxi	↑Oth. Urb.	↓Oth. Urb.
	Rideshare	↑ ↑Syd ↑Rest	↓ ↓Syd ↓Rest
	Limo / Other HV		
Used Taxi	*Past 6 months*	↑ ↑Syd	↓ ↓Syd
	Past month	↑ ↑Syd ↑Rest	↓ ↓Syd ↓Rest
Used Rideshare	*Past 6 months*	↑ ↑Syd ↑Rest	↓ ↓Syd ↓Rest
	Past month	↑ ↑Syd ↑Rest	↓ ↓Syd ↓Rest
Used Limo / Other HV	*Past 6 months*	↑ ↑Syd ↑Rest	↓ ↓Syd ↓Rest
	Past month	↑ ↑Syd	↓ ↓Syd
Change in use - Taxi	*More*		
	Less		
Change in use - Rideshare	*More*		
	Less		
Change in use - Limo / Other HV	*More*		
	Less		
Change in Taxi usage due to use of any hire vehicle	**No longer use taxi**		
	Use taxi less		
Tried to use - not able to	Taxi	↑ ↑Syd	↓ ↓Syd
	Rideshare	↑ ↑Rest	↓ ↓Rest
	Limo / Other HV		
Satisfaction with service in area - Taxi	*Satisfied*		
	Dissatisfied	↑Syd	↓Syd
Satisfaction with service in area - Rideshare	*Satisfied*	↑ ↑Syd	↓ ↓Syd
	Dissatisfied		
Satisfaction with service in area - Limo / Other HV	*Satisfied*		
	Dissatisfied		
Overall preference	Taxi		
	Rideshare	↑ ↑Syd ↑Rest	↓ ↓Syd ↓Rest
	Limo / Other HV		

Primary Indicators (continued)		Gender	
		Male	Female
Value for money - Taxi	*Good*		
	Poor	↑ ↑Syd ↑Rest	↓ ↓Syd ↓Rest
Value for money - Rideshare	*Good*	↑Rest	↓Rest
	Poor		
Value for money - Limo / Other HV	*Good*		
	Poor	↑ ↑Rest	↓ ↓Rest
Last used service	**Taxi**	↓ ↓Syd ↓Rest	↑ ↑Syd ↑Rest
	Rideshare	↑ ↑Rest	↓ ↓Rest
	Limo / Other HV		
Time of use	**Before 10pm**	↓Syd	↑Syd
	After 10pm	↑Syd	↓Syd
If Taxi - used rank/hail	**Yes**	↑	↓
Overall satisfaction	**Taxi**		
	Rideshare		
	Limo / Other HV		

Secondary Indicators		Gender	
		Male	Female
Any problems experienced over past 12 months	**Taxi**	↑ ↑Syd	↓ ↓Syd
	Rideshare		
	Limo / Other HV		
Strength or Weakness - Value for money	**Taxi** - *(Str.)*		
	Taxi - *(Weak.)*	↑ ↑Rest	↓ ↓Rest
	Rideshare - *(Str.)*	↑ ↑Syd	↓ ↓Syd
	Rideshare - *(Weak.)*		
	Limo / Other HV - *(Str.)*	↓	↑
	Limo / Other HV- *(Weak.)*	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
Strength or Weakness - Convenience	**Taxi** - *(Str.)*	↓ ↓Syd	↑ ↑Syd
	Taxi - *(Weak.)*	↑	↓
	Rideshare - *(Str.)*		
	Rideshare - *(Weak.)*	↑ ↑Syd	↓ ↓Syd
	Limo / Other HV - *(Str.)*	↓	↑
	Limo / Other HV- *(Weak.)*	↑Oth. Urb.	↓Oth. Urb.

Secondary Indicators (Continued)		Gender: Male	Gender: Female
Strength or Weakness - Safety	Taxi - *(Str.)*	↓ ↓Syd	↑ ↑Syd
	Taxi - *(Weak.)*		
	Rideshare - *(Str.)*		
	Rideshare - *(Weak.)*	↓Oth. Urb. ↓ ↓Syd	↑Oth. Urb. ↑ ↑Syd
	Limo / Other HV - *(Str.)*		
	Limo / Other HV- *(Weak.)*	↑ ↑Syd	↓ ↓Syd
Impact of rank/hail minimum fare on Taxi usage @$10	*Much less likely*		
	Much + a little less likely		

Secondary Indicators (Last trip)		Gender: Male	Gender: Female
Methods used to obtain Taxi	*Pre-book*	↓ ↓Rest	↑ ↑Rest
	ASAP booking		
	Rank		
	Hail	↑ ↑Syd	↓ ↓Syd
Methods used to obtain Rideshare	*Pre-book*		
	ASAP booking		
Methods used to obtain Limo / Other HV	*Pre-book*		
	ASAP booking	↑ ↑Oth. Urb.	↓ ↓Oth. Urb.
% at least slightly satisfied with waiting times	Taxi		
	Rideshare		
	Limo / Other HV	↑ ↑Syd	↓ ↓Syd
% at least slightly satisfied with fare	Taxi		
	Rideshare		
	Limo / Other HV		
Compared fare before using service	Taxi		
	Rideshare		
	Limo / Other HV	↓ ↓Oth. Urb.	↑ ↑Oth. Urb.
Likelihood to re-use service after using for last ride (impact)	Taxi		
	Rideshare		
Awareness of regulatory changes	*Aware*	↑ ↑Syd	↓ ↓Syd
	Aware + have heard	↑ ↑Rest	↓ ↓Rest

Primary Indicators		Income			
		Under $30k	$30-60k	$60-100k	$100k+
Aware (in area)	Taxi	↓ ↓Rest	↓ ↓Syd	↑ ↑Rest	↑ ↑Syd
	Rideshare	↓	↓	↓	↑
	Limo / Other HV	↓ ↓Syd ↓Rest	↓ ↓Syd ↓Rest	↓ ↑Rest	↑ ↑Syd ↑Rest
Used Taxi	*Past 6 months*	↓ ↓Syd	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd
	Past month	↓ ↓Syd	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd
Used Rideshare	*Past 6 months*	↓ ↓Syd	↓	↓ ↓Syd ↓Oth. Urb.	↑
	Past month	↓ ↓Syd	↓ ↓Syd	↓ ↓Syd ↓Oth. Urb.	↑ ↑Syd ↑Oth. Urb.
Used Limo / Other HV	*Past 6 months*	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Rest	↓ ↓Syd	↑
	Past month	↓ ↓Rest		↓	↑ ↑Rest
Change in use - Taxi	*More*				
	Less				
Change in use - Rideshare	*More*	↓ ↓Syd			↑ ↑Syd
	Less				
Change in use - Limo / Other HV	*More*		↑Syd		↓Syd
	Less				
Change in Taxi usage due to use of any hire vehicle	No longer use taxi	↑ ↑Syd	↑ ↑Syd		↓ ↓Syd
	Use taxi less				
Tried to use - not able to	Taxi	↓	↓ ↓Oth. Urb.	↓ ↓Syd	↑ ↑Syd ↑Oth. Urb.
	Rideshare			↓ ↓Rest	↑ ↑Rest
	Limo / Other HV				
Satisfaction with service in area - Taxi	*Satisfied*			↑	↓
	Dissatisfied	↓ ↓Syd	↓ ↓Syd	↓	↑ ↑Syd
Satisfaction with service in area - Rideshare	*Satisfied*	↓ ↓Syd ↓Rest	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd ↑Rest
	Dissatisfied				
Satisfaction with service in area - Limo / Other HV	*Satisfied*	↓ ↓Oth. Urb. ↓Rest	↓ ↓Syd	↑ ↑Oth. Urb.	↑
	Dissatisfied				
Overall preference	Taxi				
	Rideshare	↓ ↓Syd ↓Rest	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd ↑Rest
	Limo / Other HV				

Primary Indicators (continued)		Income			
		Under $30k	$30-60k	$60-100k	$100k+
Value for money - Taxi	*Good*	↑			↓
	Poor	↓ ↓Syd	↓ ↓Syd ↓Oth. Urb.	↑ ↓Syd ↑Oth. Urb.	↑ ↑Syd
Value for money - Rideshare	*Good*	↓ ↓Syd	↓ ↓Syd		↑ ↑Syd
	Poor				
Value for money - Limo / Other HV	*Good*			↓Oth. Urb.	↑Oth. Urb.
	Poor			↓	↑
Last used service	**Taxi**	↑		↑	↓
	Rideshare	↓			↑
	Limo / Other HV				
Time of use	**Before 10pm**	↑	↑	↑ ↑Syd	↓ ↓Syd
	After 10pm	↓	↓	↓ ↓Syd	↑ ↑Syd
If Taxi - used rank/hail	**Yes**	↓ ↓Syd	↓ ↓Syd	↑Syd	↑ ↑Syd
Overall satisfaction	**Taxi**				
	Rideshare	↓ ↓Syd		↑ ↑Syd	↑ ↑Syd
	Limo / Other HV				

Secondary Indicators		Income			
		Under $30k	$30-60k	$60-100k	$100k+
Any problems experienced over past 12 months	**Taxi**	↓	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd
	Rideshare				
	Limo / Other HV	↑ ↑Syd		↓ ↓Syd	↑
Strength or Weakness - Value for money	**Taxi** - *(Str.)*	↑	↑ ↑Syd	↑	↓ ↓Syd
	Taxi - *(Weak.)*	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd	↑ ↑Oth. Urb.	↑ ↑Syd
	Rideshare - *(Str.)*	↓ ↓Syd ↓Rest	↓ ↓Syd	↑ ↑Syd	↑ ↑Syd ↑Rest
	Rideshare - *(Weak.)*				
	Limo / Other HV - *(Str.)*			↑	↓
	Limo / Other HV- *(Weak.)*	↓ ↓Syd	↓ ↓Syd	↓	↑ ↑Syd
Strength or Weakness - Convenience	**Taxi** - *(Str.)*				
	Taxi - *(Weak.)*		↓ ↓Rest		↑ ↑Rest
	Rideshare - *(Str.)*	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd	↑ ↑Syd
	Rideshare - *(Weak.)*				
	Limo / Other HV - *(Str.)*				
	Limo / Other HV- *(Weak.)*				

Secondary Indicators (Continued)		Income Under $30k	Income $30-60k	Income $60-100k	Income $100k+
Strength or Weakness - Safety	Taxi - *(Str.)*	↑	↑	↑ ↑Syd	↓ ↓Syd
	Taxi - *(Weak.)*	↓ ↓Syd	↓ ↓Syd ↓Rest	↓ ↓Syd	↑ ↑Syd ↑Rest
	Rideshare - *(Str.)*				
	Rideshare - *(Weak.)*				
	Limo / Other HV - *(Str.)*				
	Limo / Other HV- *(Weak.)*				
Impact of rank/hail minimum fare on Taxi usage @$10	*Much less likely*				
	Much + a little less likely				

Secondary Indicators (Last trip)		Income Under $30k	Income $30-60k	Income $60-100k	Income $100k+
Methods used to obtain Taxi	*Pre-book*				
	ASAP booking				
	Rank		↓Syd		↑Syd
	Hail	↓ ↓Syd	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd
Methods used to obtain Rideshare	*Pre-book*				
	ASAP booking	↓	↓ ↓Syd	↓ ↓Syd	↑ ↑Syd
Methods used to obtain Limo / Other HV	*Pre-book*				
	ASAP booking				
% at least slightly satisfied with waiting times	Taxi	↓ ↓Syd	↑	↑ ↑Syd	
	Rideshare				
	Limo / Other HV	↓			↑
% at least slightly satisfied with fare	Taxi				
	Rideshare	↓ ↓Syd		↑ ↑Syd	↑ ↑Syd
	Limo / Other HV				
Compared fare before using service	Taxi				
	Rideshare	↑Syd	↑ ↑Syd		↓ ↓Syd
	Limo / Other HV				
Likelihood to re-use service after using for last ride (impact)	Taxi	↑			↓
	Rideshare				
Awareness of regulatory changes	*Aware*				
	Aware + have heard				

Primary Indicators		Disability	
		Disability	No disability
Aware (in area)	Taxi		
	Rideshare	↓ ↓Oth. Urb. ↓Rest	↑ ↑Oth. Urb. ↑Rest
	Limo / Other HV		
Used Taxi	*Past 6 months*		
	Past month		
Used Rideshare	*Past 6 months*	↓ ↓Syd ↓Rest	↑ ↑Syd ↑Rest
	Past month	↓ ↓Syd	↑ ↑Syd
Used Limo / Other HV	*Past 6 months*	↓	↑
	Past month		
Change in use - Taxi	*More*	↑ ↑Syd ↑Rest	↓ ↓Syd ↓Rest
	Less		
Change in use - Rideshare	*More*		
	Less		
Change in use - Limo / Other HV	*More*	↑Rest	↓Rest
	Less	↑ ↑Syd	↓ ↓Syd
Change in Taxi usage due to use of any hire vehicle	No longer use taxi		
	Use taxi less		
Tried to use - not able to	Taxi	↑Syd	↓Syd
	Rideshare		
	Limo / Other HV		
Satisfaction with service in area - Taxi	*Satisfied*	↑ ↑Rest	↓ ↓Rest
	Dissatisfied	↓Syd	↑Syd
Satisfaction with service in area - Rideshare	*Satisfied*	↓	↑
	Dissatisfied	↑Syd	↓Syd
Satisfaction with service in area - Limo / Other HV	*Satisfied*		
	Dissatisfied		
Overall preference	Taxi	↑ ↑Syd	↓ ↓Syd
	Rideshare	↓ ↓Syd	↑ ↑Syd
	Limo / Other HV		

Primary Indicators (continued)		Disability: Disability	Disability: No disability
Value for money - Taxi	*Good*	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
	Poor	↓ ↓Syd	↑ ↑Syd
Value for money - Rideshare	*Good*	↓	↑
	Poor	↑	↓
Value for money - Limo / Other HV	*Good*	↑ ↑Rest	↓ ↓Rest
	Poor		
Last used service	**Taxi**	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
	Rideshare	↓ ↓Syd	↑ ↑Syd
	Limo / Other HV		
Time of use	**Before 10pm**	↑ ↑Syd	↓ ↓Syd
	After 10pm	↓ ↓Syd	↑ ↑Syd
If Taxi - used rank/hail	**Yes**	↓ ↓Syd	↑ ↑Syd
Overall satisfaction	**Taxi**		
	Rideshare		
	Limo / Other HV		

Secondary Indicators		Disability: Disability	Disability: No disability
Any problems experienced over past 12 months	**Taxi**	↓	↑
	Rideshare	↑	↓
	Limo / Other HV	↑Syd	↓Syd
Strength or Weakness - Value for money	**Taxi** - *(Str.)*	↑ ↑Syd	↓ ↓Syd
	Taxi - *(Weak.)*	↓ ↓Syd	↑ ↑Syd
	Rideshare - *(Str.)*	↓ ↓Syd	↑ ↑Syd
	Rideshare - *(Weak.)*	↑ ↑Syd	↓ ↓Syd
	Limo / Other HV - *(Str.)*	↑	↓
	Limo / Other HV- *(Weak.)*		
Strength or Weakness - Convenience	**Taxi** - *(Str.)*	↑	↓
	Taxi - *(Weak.)*		
	Rideshare - *(Str.)*	↓	↑
	Rideshare - *(Weak.)*	↑ ↑Syd	↓ ↓Syd
	Limo / Other HV - *(Str.)*	↑ ↑Syd	↓ ↓Syd
	Limo / Other HV- *(Weak.)*		

Secondary Indicators (Continued)		Disability	
		Disability	No disability
Strength or Weakness - Safety	Taxi - *(Str.)*	↑ ↑Oth. Urb.	↓ ↓Oth. Urb.
	Taxi - *(Weak.)*		
	Rideshare - *(Str.)*		
	Rideshare - *(Weak.)*		
	Limo / Other HV - *(Str.)*	↑	↓
	Limo / Other HV- *(Weak.)*		
Impact of rank/hail minimum fare on Taxi usage @$10	*Much less likely*		
	Much + a little less likely		

Secondary Indicators (Last trip)		Disability	
		Disability	No disability
Methods used to obtain Taxi	*Pre-book*		
	ASAP booking	↑ ↑Syd	↓ ↓Syd
	Rank		
	Hail	↓ ↓Syd	↑ ↑Syd
Methods used to obtain Rideshare	*Pre-book*	↑ ↑Syd	↓ ↓Syd
	ASAP booking		
Methods used to obtain Limo / Other HV	*Pre-book*		
	ASAP booking		
% at least slightly satisfied with waiting times	Taxi		
	Rideshare		
	Limo / Other HV		
% at least slightly satisfied with fare	Taxi		
	Rideshare		
	Limo / Other HV		
Compared fare before using service	Taxi		
	Rideshare	↑Syd	↓Syd
	Limo / Other HV		
Likelihood to re-use service after using for last ride (impact)	Taxi		
	Rideshare		
Awareness of regulatory changes	*Aware*	↑Syd	↓Syd
	Aware + have heard		

ORIMA RESEARCH

Primary Indicators		Employment: Full time employment	Employment: Part time employment	Employment: No employment
Aware (in area)	Taxi	↑ ↑Rest	↑ ↑Rest	↓ ↓Rest
	Rideshare	↑ ↑Oth. Urb. ↑Rest	↑	↓ ↓Oth. Urb. ↓Rest
	Limo / Other HV	↑	↑	↓
Used Taxi	*Past 6 months*	↑	↓ ↓Syd ↓Rest	↓
	Past month	↑	↓ ↓Syd	↓
Used Rideshare	*Past 6 months*	↑	↓ ↓Syd ↓Rest	↓
	Past month	↑	↓	↓
Used Limo / Other HV	*Past 6 months*	↑	↓ ↓Syd	↓
	Past month	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd	↓ ↓Syd ↓Oth. Urb.
Change in use - Taxi	*More*			
	Less	↑	↓	
Change in use - Rideshare	*More*			
	Less	↑ ↑Syd	↓ ↓Syd	↑ ↑Syd
Change in use - Limo / Other HV	*More*			
	Less			
Change in Taxi usage due to use of any hire vehicle	No longer use taxi	↓ ↓Syd	↑Syd	↑ ↑Syd
	Use taxi less	↑Rest	↓Rest	
Tried to use - not able to	Taxi	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd ↓Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
	Rideshare	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
	Limo / Other HV	↑ ↑Syd		↓ ↓Syd
Satisfaction with service in area - Taxi	*Satisfied*	↑Rest		↓Rest
	Dissatisfied	↑ ↑Syd		↓ ↓Syd
Satisfaction with service in area - Rideshare	*Satisfied*	↑	↑	↓
	Dissatisfied			
Satisfaction with service in area - Limo / Other HV	*Satisfied*	↑ ↑Oth. Urb.	↑	↓ ↓Oth. Urb.
	Dissatisfied			
Overall preference	Taxi	↓		↑
	Rideshare	↑	↓ ↓Syd ↓Oth. Urb.	↓
	Limo / Other HV			

Primary Indicators (continued)		Employment		
		Full time employment	Part time employment	No employment
Value for money - Taxi	*Good*			
	Poor	↑	↑ ↑Syd ↓Rest	↓ ↓Syd ↓Oth. Urb.
Value for money - Rideshare	*Good*	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
	Poor	↓Oth. Urb.	↑Oth. Urb.	↓Oth. Urb.
Value for money - Limo / Other HV	*Good*	↑ ↑Oth. Urb.	↓ ↓Oth. Urb.	
	Poor	↑		↓
Last used service	Taxi	↓		↑
	Rideshare	↑		↓
	Limo / Other HV			
Time of use	Before 10pm	↓ ↓Syd ↓Rest	↓ ↓Syd	↑ ↑Syd ↑Rest
	After 10pm	↑ ↑Syd ↑Rest	↑ ↑Syd	↓ ↓Syd ↓Rest
If Taxi - used rank/hail	Yes	↑ ↑Syd		↓ ↓Syd
Overall satisfaction	Taxi	↓ ↓Syd		↑ ↑Syd
	Rideshare			
	Limo / Other HV			

Secondary Indicators		Employment		
		Full time employment	Part time employment	No employment
Any problems experienced over past 12 months	Taxi	↑ ↑Syd ↑Oth. Urb.	↓	↓ ↓Syd ↓Oth. Urb.
	Rideshare	↑ ↑Syd	↑ ↑Syd	↓ ↓Syd
	Limo / Other HV		↑Oth. Urb.	↓Oth. Urb.
Strength or Weakness - Value for money	Taxi - *(Str.)*	↓		↑
	Taxi - *(Weak.)*	↑	↓	↓
	Rideshare - *(Str.)*	↑	↓ ↓Syd	↓
	Rideshare - *(Weak.)*			
	Limo / Other HV - *(Str.)*			
	Limo / Other HV- *(Weak.)*	↑		↓
Strength or Weakness - Convenience	Taxi - *(Str.)*	↓ ↓Syd		↑ ↑Syd
	Taxi - *(Weak.)*	↑ ↑Oth. Urb.		↓ ↓Oth. Urb.
	Rideshare - *(Str.)*	↑ ↑Syd ↑Rest		↓ ↓Syd ↓Rest
	Rideshare - *(Weak.)*			
	Limo / Other HV - *(Str.)*			
	Limo / Other HV- *(Weak.)*			

Secondary Indicators (Continued)		Employment: Full time employment	Employment: Part time employment	Employment: No employment
Strength or Weakness - Safety	Taxi - *(Str.)*	↓ ↓Syd		↑ ↑Syd
	Taxi - *(Weak.)*	↑ ↑Syd	↓ ↓Syd	↓ ↓Syd
	Rideshare - *(Str.)*			
	Rideshare - *(Weak.)*			
	Limo / Other HV - *(Str.)*			
	Limo / Other HV- *(Weak.)*			
Impact of rank/hail minimum fare on Taxi usage @$10	*Much less likely*			
	Much + a little less likely			

Secondary Indicators (Last trip)		Employment: Full time employment	Employment: Part time employment	Employment: No employment
Methods used to obtain Taxi	*Pre-book*			
	ASAP booking	↑Rest	↓Rest	↓Rest
	Rank	↑Syd	↓Syd	↓Syd
	Hail	↑ ↑Syd	↓	↓ ↓Syd
Methods used to obtain Rideshare	*Pre-book*			
	ASAP booking			
Methods used to obtain Limo / Other HV	*Pre-book*			
	ASAP booking			
% at least slightly satisfied with waiting times	Taxi			
	Rideshare			
	Limo / Other HV			
% at least slightly satisfied with fare	Taxi	↓		↑
	Rideshare	↑ ↑Syd	↓ ↓Syd	
	Limo / Other HV			
Compared fare before using service	Taxi			
	Rideshare			
	Limo / Other HV			
Likelihood to re-use service after using for last ride (impact)	Taxi	↓ ↓Syd	↓ ↓Oth. Urb.	↑ ↑Syd ↑Oth. Urb.
	Rideshare	↓Syd		↑Syd
Awareness of regulatory changes	*Aware*	↑ ↑Syd ↑Rest		↓ ↓Syd ↓Rest
	Aware + have heard	↑ ↑Syd ↑Rest		↓ ↓Syd ↓Rest

Primary Indicators		Currently studying	
		No study	Full/part time study
Aware (in area)	Taxi		
	Rideshare	↓ ↓Oth. Urb. ↓Rest	↑ ↑Oth. Urb. ↑Rest
	Limo / Other HV	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
Used Taxi	*Past 6 months*	↑ ↑Syd	↓ ↓Syd
	Past month	↑ ↑Syd	↓ ↓Syd
Used Rideshare	*Past 6 months*	↓ ↓Oth. Urb.	↑ ↑Oth. Urb.
	Past month	↓	↑
Used Limo / Other HV	*Past 6 months*		
	Past month		
Change in use - Taxi	*More*		
	Less	↓ ↓Syd	↑ ↑Syd
Change in use - Rideshare	*More*		
	Less	↓Oth. Urb.	↑Oth. Urb.
Change in use - Limo / Other HV	*More*		
	Less	↓	↑
Change in Taxi usage due to use of any hire vehicle	No longer use taxi	↓ ↓Syd	↑ ↑Syd
	Use taxi less	↓ ↓Syd	↑ ↑Syd
Tried to use - not able to	Taxi	↓Rest	↑Rest
	Rideshare	↓ ↓Rest	↑ ↑Rest
	Limo / Other HV	↓ ↓Syd ↓Rest	↑ ↑Syd ↑Rest
Satisfaction with service in area - Taxi	*Satisfied*	↑ ↑Syd	↓ ↓Syd
	Dissatisfied		
Satisfaction with service in area - Rideshare	*Satisfied*	↓ ↓Syd ↓Oth. Urb.	↑ ↑Syd ↑Oth. Urb.
	Dissatisfied		
Satisfaction with service in area - Limo / Other HV	*Satisfied*		
	Dissatisfied		
Overall preference	Taxi	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
	Rideshare	↓ ↓Syd ↓Oth. Urb.	↑ ↑Syd ↑Oth. Urb.
	Limo / Other HV	↑	↓

ORIMA RESEARCH

Primary Indicators (continued)		Currently studying: No study	Currently studying: Full/part time study
Value for money - Taxi	*Good*		
	Poor		
Value for money - Rideshare	*Good*	↓ ↓Syd	↑ ↑Syd
	Poor		
Value for money - Limo / Other HV	*Good*		
	Poor		
Last used service	**Taxi**	↑ ↑Syd ↑Oth. Urb.	↓ ↓Syd ↓Oth. Urb.
	Rideshare	↓ ↓Syd ↓Oth. Urb.	↑ ↑Syd ↑Oth. Urb.
	Limo / Other HV		
Time of use	**Before 10pm**	↑	↓
	After 10pm	↓	↑
If Taxi - used rank/hail	**Yes**		
Overall satisfaction	**Taxi**		
	Rideshare		
	Limo / Other HV		

Secondary Indicators		Currently studying: No study	Currently studying: Full/part time study
Any problems experienced over past 12 months	**Taxi**	↓ ↓Rest	↑ ↑Rest
	Rideshare		
	Limo / Other HV	↓ ↓Syd	↑ ↑Syd
Strength or Weakness - Value for money	**Taxi** - *(Str.)*	↑ ↑Syd	↓ ↓Syd
	Taxi - *(Weak.)*	↓ ↓Oth. Urb. ↓Rest	↑ ↑Oth. Urb. ↑Rest
	Rideshare - *(Str.)*		
	Rideshare - *(Weak.)*		
	Limo / Other HV - *(Str.)*	↑	↓
	Limo / Other HV- *(Weak.)*		
Strength or Weakness - Convenience	**Taxi** - *(Str.)*		
	Taxi - *(Weak.)*		
	Rideshare - *(Str.)*	↓ ↓Syd ↓Oth. Urb.	↑ ↑Syd ↑Oth. Urb.
	Rideshare - *(Weak.)*	↑	↓
	Limo / Other HV - *(Str.)*	↑ ↑Syd	↓ ↓Syd
	Limo / Other HV- *(Weak.)*	↓ ↓Syd	↑ ↑Syd

Secondary Indicators (Continued)		Currently studying	
		No study	Full/part time study
Strength or Weakness - Safety	Taxi - *(Str.)*		
	Taxi - *(Weak.)*		
	Rideshare - *(Str.)*	↓Syd	↑Syd
	Rideshare - *(Weak.)*		
	Limo / Other HV - *(Str.)*	↑ ↑Rest	↓ ↓Rest
	Limo / Other HV- *(Weak.)*	↓ ↓Rest	↑ ↑Rest
Impact of rank/hail minimum fare on Taxi usage @$10	*Much less likely*	↓ ↓Syd	↑ ↑Syd
	Much + a little less likely	↓ ↓Syd	↑ ↑Syd

Secondary Indicators (Last trip)		Currently studying	
		No study	Full/part time study
Methods used to obtain Taxi	*Pre-book*		
	ASAP booking		
	Rank	↑ ↑Syd	↓ ↓Syd
	Hail		
Methods used to obtain Rideshare	*Pre-book*		
	ASAP booking		
Methods used to obtain Limo / Other HV	*Pre-book*	↑ ↑Syd	↓ ↓Syd
	ASAP booking	↓ ↓Syd	↑ ↑Syd
% at least slightly satisfied with waiting times	Taxi	↑ ↑Syd	↓ ↓Syd
	Rideshare		
	Limo / Other HV		
% at least slightly satisfied with fare	Taxi		
	Rideshare	↑	↓
	Limo / Other HV	↑ ↑Syd	↓ ↓Syd
Compared fare before using service	Taxi		
	Rideshare		
	Limo / Other HV		
Likelihood to re-use service after using for last ride (impact)	Taxi	↓ ↓Syd	↑ ↑Syd
	Rideshare		
Awareness of regulatory changes	*Aware*	↓	↑
	Aware + have heard	↓Syd	↑Syd