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TAVERNER RESEARCH

Report on:

Survey of Point to Point Transport Use

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1. Executive summary

IPART commissioned Taverner Research to conduct an online survey of a representative sample including as close as possible to 2,000 Urban Sydney adults (2,021 achieved), 500 Other Urban adults (drawn from urban areas of Newcastle, Wollongong, Gosford and Wyong, with 504 achieved) and 250 Country adults (drawn from a list of Country towns with 20 or more taxi licences, 251 achieved) to establish:

- The prevalence and frequency of using taxis, ride share, car share, hire car, courtesy transport and community transport in the previous six months
- Reasons for use (among users) or non-use (among non-users) of taxis, car share and ride share
- Perceived value for trips at different times or on different days
- What would persuade respondents to make more use of taxis in future
- The origin, destination, day of week, time of day and other characteristics of the most recent taxi, ride share and car share journey for those who had used that service in the past six months
- Experience with, and evaluations of the service among taxi users, including: problems of access experienced when taking a taxi from a taxi rank; hailing a passing taxi; or booking the next available taxi, or a taxi for a specific time
- Particular problems experienced with taxi use due to physical disability, and in particular use of a wheelchair
- Prevalence of seeking to use and being unable to obtain a taxi.

A total of 2,776 completed questionnaires were obtained, 2,021 from Urban Sydney, 504 from the Other Urban locations and 251 from the Country locations. While the samples were not an exact match to ABS estimates of the age by gender distribution of the populations of the three locations, a check on the effect of weighting the samples for each location to more closely match the population age by gender distribution showed that this had a very small effect on the rated frequency of using a taxi, a ride share service or a car share service. Weighted estimates of the population distribution for

these items, as well as the unweighted results from the sample are reported. As the effects of weighting are small, the bulk of the report uses the unweighted data to describe results for the sample and its segments. This has the advantage that the confidence intervals and power to detect differences between groups is larger than would be the case if weighted data are used.

From the replies we estimate (using weighted data) that:

- 60% of Urban Sydney adults had used a taxi in the previous six months compared to 44% of Other Urban and 41% of Country adults
- 25% in Urban Sydney had done so less than once a month, compared to 23% of Other Urban and 18% of Country adults
- 16% did so at least once a week including (sum of proportions of those who use taxis one to two times a week or more; see Figure 1), 8% more than twice a week in Urban Sydney compared to 6% and 3% in Other Urban and 11% and 6% in the Country towns
- Thus taxi use is significantly[1] more common in Urban Sydney than in other areas served by taxis, and more frequent use is more common in Urban Sydney than in the other two locations
- The prevalence of taxi use in Urban Sydney has been stable since 2013 at 58% to 60%; the lower prevalence (55%) in 2012 might be due to changes in the rating scale rather than to changes in actual use

As found in the previous surveys:

- Mode of obtaining a taxi has the biggest effect on waiting time with booking the next available taxi producing the longest waiting times
- Waiting times are higher on Friday and Saturday nights
- Fares are generally not seen as offering value for money and appear to be a major barrier to use

[11] All differences described as "significant" are statistically significant at the 95% level of confidence or better

- Reduced fares are the improvement that would be most likely to persuade both users and non-users to increase their use
- Lower cost is a major reason given for use of emerging car sharing and ride sharing services

While there have been some changes over time, the stability of key findings about taxi use is a major feature of the results.

One area of change is the use of alternative forms of what can be called individualised or point to point transport. In addition to hire cars, the 2016, 2015 and 2014 surveys asked about use of car share and ride share services, and the 2016 and 2015 survey asked about use of courtesy transport and community transport services.

In Urban Sydney:

- Use of ride share services increased from 11% (2014) to 19% (2015) and jumped markedly to 33% in 2016
- Use of car share services shows smaller increases from 13% (2014) and 17% (2015) to 22% (2016); the differences between 2014 and 2016 is significant
- Use of hire car services has steadily increased from 14% in 2012 to 24% in 2016 (a significant increase)
- Use of courtesy transport rose significantly from 21% (2015) to 25% (2016)
- Use of community transport rose significantly from 21% (2015) to 27% (2016)

All these changes are statistically significant. Given the size of the total Urban Sydney samples, differences of under 10 percentage points are statistically significant.

Ride share users in 2016 are more likely to say their use of ride share services has decreased their use of taxis than to say it has increased their use of taxis. Despite this, and the increased use of other paid and free point to point services, there has been no apparent fall in reported taxi use, and users of the alternative services are more likely than non-users to report using taxis and to report doing so more often.

The report provides detailed results for key questionnaire items, examines the relationship of key items to others that have policy relevance and identifies changes in the results compared to the previous surveys in 2015, 2014, 2013 and 2012.

2. Background & Introduction

IPART commissioned Taverner Research to conduct an online survey of a representative sample of 2,000 Urban Sydney adults to update annual data about access to and use of taxis in the Sydney transport region. The annual data sets were collected in October/November 2012, with subsequent waves in October/November 2013 and 2014, and November 2015 and 2016.

In the November 2014, 2015 and 2016 surveys, additional samples were sought of at least 500 in Other Urban locations (urban Newcastle, Wollongong, Gosford and Wyong, based on the transport district boundaries for each) and as close as possible to 250 in selected Country towns with 20 or more taxi licences. The towns included in the sample were expanded in 2016 from 10 to 13. In 2016 more extensive data were obtained about use of ride share and car share services.

Particular attention was paid to the effects of journey origin, destination, day of week and time of day on the experience of journeys taken, and on giving consideration to taking a taxi and either being unable to obtain one or deciding for other reasons to not use a taxi.

The level and experience of use was also analysed by other indicators of equity of access, including income level and whether the respondent required a special taxi or had a physical disability affecting use.

A number of items were asked in exactly the same way as in the previous surveys. Others were updated to improve the quality of the data based on the results of previous surveys and to reflect recent developments in the taxi market. Items about the use and experience of using car share and ride share services were added.

Where possible, comparisons are reported between the 2016, 2015, 2014, 2013 and 2012 results for Urban Sydney. For those items about car share and ride share services that have been repeated, comparisons are reported with previous years. For 2016, results are also compared between Urban Sydney, Other Urban and Country locations, and results for each location are compared to data obtained in 2015 and 2014.

3. Methodology

3.1. The survey questions

The survey items were designed to assess:

- Postcode (to ensure respondents were in the defined target area
- Gender and age group (to allow management of the sample composition)
- Work status (as this influenced whether some questions were asked)
- Frequency of using taxis, ride share, car share, hire car, courtesy transport and community transport services within the past six months
- For all who had used a taxi but not a ride share service in the past six months, and a randomly selected sub-group (around 70%) of those who had used both in the past six months, for their most recent taxi trip …
    - Origin
    - Destination
    - Whether the journey used the Sydney Harbour Bridge (SHB) or Sydney Harbour Tunnel (SHT) and in which direction
    - Day of week
    - Time of day
    - Distance travelled
    - How the taxi was obtained
    - Time required to obtain a taxi (unless booked for a specific time)
    - Whether on time and how late (if booked for a specific time)
    - Action taken if a booked taxi did not arrive or was late
    - Fare paid
    - Who was responsible for paying the fare
    - Reason for use

- Satisfaction with use

✧ For all respondents whether they had in the past six months considered taking a taxi and then not done so, and (if so) …

- Whether they tried unsuccessfully, or decided against it for other reasons
- Where they would have boarded
- The distance they would have travelled
- The day of week and time of day
- What alternative mode of travel they adopted
- Whether the journey would have used the Sydney Harbour Bridge (SHB) or Sydney Harbour Tunnel (SHT) and in which direction

✧ For all those who had used a ride share service in the past six months:

- Whether in the past 12 months they had used the service more, less or not changed
- Reasons for using ride share services more or less
- What would be most likely to get a ride share user to use more regularly, from a prompted list
- Whether ride share services offer value for money overall, when peak or surge pricing is NOT operating, and when peak or surge pricing is operating
- Impact of ride share use on taxi use
- Whether time taken to obtain a ride share service during the day, on Friday and Saturday nights and on other nights is reasonable
- (If working) Whether their workplace pays for use of ride share, and whether their employer has allowed more frequent, less frequent or not changed use policy

✧ For any who had used ride share and not used a taxi in the past six months and for a random selection (target 30%) of those who had used both, for their most recent ride share trip:

- Where their journey started, and whether from respondents own house
- Where they alighted and whether alighted at own house
- Whether they crossed Sydney Harbour using the bridge or the tunnel
- The distance travelled
- Whether the trip was on Monday to Thursday, Friday or Saturday, or on Sunday
- Whether the trip was in the morning, afternoon, evening or at night after 10pm
- The main reason for taking ride share
- The app used to book the journey
- Whether they booked next available or for a specific time
- Length of wait
- Action taken if car booked for a specific time was late
- Satisfaction with the waiting time
- Who covered the cost
- Satisfaction with the fare paid

✧ For all respondents, whether they had considered taking a ride share trip in the last six months but then not done so, never considered taking a ride share trip (hidden for those who had taken a ride share trip) or had always taken one when they had thought of doing so

✧ For those who had considered taking a ride share trip but not done so whether they had tried and could not get one, or thought about it and decided to do something different

✧ Alternative used for those who had not taken a ride share trip when they had thought about doing so

✧ Reason for not taking the ride share trip when they had thought about doing so

✧ Day and time the trip not taken would have been

- (For those who had used a ride share service in the past six months) any problems experienced with a ride share service in the past 12 months and the nature of the problem (prompted list plus Other[SPECIFY])
- For those who have not considered using a ride share service, the reason for not doing so from a prompted list
- For those who had used a car share service in the past six months:
    - Whether they had used such services more, less or had not changed use in the past twelve months compared to the previous 12 months
    - Reasons for using a car share service more or less (from prompted lists)
    - Which from a prompted list of reasons would get them to make more regular use of car share services
    - Whether they consider car share services offer good value for money
    - Whether they were able to get a car share when they wanted it the last time they used one
    - The distance covered on their most recent car share trip
    - The main purpose of their most recent car share trip
    - The main reason for using car share for that trip
    - The cost of the trip
    - Satisfaction with the fare paid
- For those who had used a hire car in the past six months their reasons for use (prompted list, multiple response)
- For those who had used courtesy transport in the past six months their reasons for use (prompted list, multiple response)

- For those who had used community transport in the past six months their reasons for use (prompted list, multiple response)
- Number of vehicles in the household
- Usual mode of travel (multiple response)
- Whether they had a physical disability that affects their use of taxis, whether they receive vouchers for subsidised use of taxis, and whether they use a wheelchair when using a taxi
- Other demographics

The questionnaire was substantially revised to include additional items about use of ride share and car share services, and to ensure a more logical flow of questions. For those who had used both taxis and ride share services in the past six months, questions about the most recent trip were asked for only one mode, with the mode chosen at random on a 70% taxis, 30% ride share basis. This was done by randomly generating a number between one and ten, and asking about the most recent taxi trip for those with a number between one and seven, and about the most recent ride share trip for those with a number in the eight to ten range.

The finalised questionnaire is attached as an appendix to this report. Respondents took around 15 minutes to complete the survey questionnaire which was conducted wholly online. However, completion time varied widely depending on the range of point to point transport services used.

3.2. Sample selection and final sample composition

Throughout the survey period, the sample composition was monitored to check whether the target numbers for the age group by gender targets had been achieved in Urban Sydney. Reminders and fresh invitations were sent as required, based on experience with the response rates being achieved, to fill the "harder to achieve" younger (under 30, especially for males) and older (over 60 and especially over 70, particularly for females) target groups for each gender.

Data collection was spread over a 10 day period to minimise any bias that might occur due to respondent readiness to respond immediately once an invitation was received. For surveys on transport use, the answers from people who are out of home more often are likely to differ from those of people who stay at home more, and those who stay at home more are likely to be among the first to respond to a survey invitation. Thus it is important to ensure that those who do not respond to an initial invitation are re-invited. This is similar to making call backs to establish contact and achieve interviews in telephone surveys.

A final sample of 2,776 usable replies was obtained, 2,021 in Urban Sydney, 504 in the Other Urban and 251 in Country locations. The distribution of age and gender in Urban Sydney was close to the target set based on ABS estimates of the adult population of the locations. Urban Sydney males aged under 20 were under-represented. Otherwise the Urban Sydney sample is very close to the estimated population. In the Other Urban sample, people aged under 30 are under-represented for both males and females, and particularly for males. The Country sample under-represents both genders aged under 30, and over represents females aged 50 or more and males aged 60 or more.

The calculation of the weights, and the weighted and unweighted distribution of responses to Q1 (frequency of taxi use in the last six months), Q49 (frequency of use of ride share services in the past six months) and Q47 (frequency of use of car share services in the past six months) are shown in Appendix 2. The results demonstrate the very limited impact of weighting for the Urban Sydney sample.

Table 1. Population targets and actual sample

SUB GROUP	Urban Sydney		Other Urban		Country	
	TARGET	ACTUAL	TARGET	ACTUAL	TARGET	ACTUAL
Males 16-29	224	159	63	24	31	4
Males 30-39	195	199	37	19	18	17
Males 40-49	181	181	39	38	19	15
Males 50-59	155	154	40	46	19	26
Males 60-69	115	119	36	56	16	34
Males 70+	102	106	33	37	15	22
TOTAL MALES	**972**	**918**	**247**	**220**	**118**	**115**
Females 16-29	224	237	54	65	32	17
Females 30-39	201	237	39	45	19	13
Females 40-49	189	191	42	46	21	14
Females 50-59	162	165	40	43	21	38
Females 60-69	118	161	37	37	19	40
Females 70 plus	134	112	41	48	20	11
TOTAL FEMALES	**1,028**	**1,103**	**253**	**284**	**132**	**133**
TOTAL SAMPLE	**2,000**	**2,021**	**500**	**504**	**250**	**251**

"Target" reflects estimated population distribution.

Differences between the expected frequencies based on the population distribution and the actual sample frequencies were <5% of the target frequency except for:

Sydney sample: Males aged 16-29 (under-sampled)
Females aged 70 or more undersampled
Other Urban sample: Males aged 16-29 (under-sampled)
Males aged 30-39 (under-sampled)
Males aged 40-49 (over-sampled)
Males aged 50-59 (over-sampled)
Females aged 20-29, 30-39 and 40-49 (all over-sampled)
Country sample: Males aged 16-29 (under-sampled)
Males aged 60+ (over-sampled)
Females aged 16-29, 30-39, 40-49 and 70 or more (all under-sampled)
Females aged 50-59 and 60-69 (over-sampled)

After exploring the effect of weighting on rated frequency of use of taxis, ride share services and car share services it was concluded that weighting typically produced a small increase in the prevalence of use of these services. This was due to the undersampling of male and younger respondents who make more use of the services.

As statistical precision and the power to detect differences between sub-groups is greater for unweighted data, and the effects of weighting are small, the unweighted results are used throughout this report unless otherwise indicated.

3.3. Analysis and reporting

Additional basic analysis produced distributions (frequencies and percentages) of replies for each item. These distributions were broken down by key analysis variables:

- By the origin, destination, day of week and time of day of that trip for …
  - the most recent taxi trip taken, and
  - the most recent trip for which a taxi was considered but not taken
  - the most recent ride share trip taken, and
  - the most recent ride share trip for which a taxi was considered but not taken
- By selected demographics including …
  - disability
  - receipt of subsidised vouchers
  - whether a wheelchair accessible vehicle is needed
  - income
  - number of vehicles in household
  - age group
  - gender

Differences that are statistically significant and meaningful are shown in the graphs of the distribution of replies. When a difference has been labelled as significant, it is statistically significant with a 5% (or smaller) margin of error.

Where comparable items were used, the data obtained in the 2016 survey for Urban Sydney are compared to the results of the 2015, 2014, 2013 and 2012 surveys.

Results for the Other Urban sample are compared to results for that sample obtained in previous November surveys.

Results for the Country sample are compared to results for that sample obtained in previous November surveys.

Throughout, 2016 results for the Urban Sydney, Other Urban and Country samples are compared.

All percentages are rounded to the nearest whole percentage value. In some graphs, bars labelled with the same percentage value have slightly different lengths but the rounded percentage value is the same.

For some items, sub totals reported in the text differ from the sum of the values shown in the graph due to rounding. Unrounded values are summed and then rounded for the totals reported in the text of the report.

Absolute differences between two percentage values are described as "percentage points" or "points percent". For example the difference between 25% and 40% would be described as 15 percentage points to make it clear that this is not the ratio between the values expressed as a percentage.

3.4. Timing

The timing for this project was as specified in the table below.

Task	Date
Project commissioning	19 October 2016
Questionnaire finalised, set up for online administration and tested	21 October 2016
Pilot survey (N=200 plus, Urban Sydney) carried out	21 November 2016
Main field work carried out	23 November to 30 November 2016
Draft report submitted	11 January 2017
Final report submitted	16 February 2017

The period between the study being commissioned and the commencement of data collection was much longer than in previous years due to the complexity of the additions to the questionnaire.

4. Results: Frequency of use

This section of the report covers the prevalence and frequency of use of taxis and other point to point services, including:

- Hire cars
- Ride share services
- Car share services
- Community transport services
- Courtesy transport services.

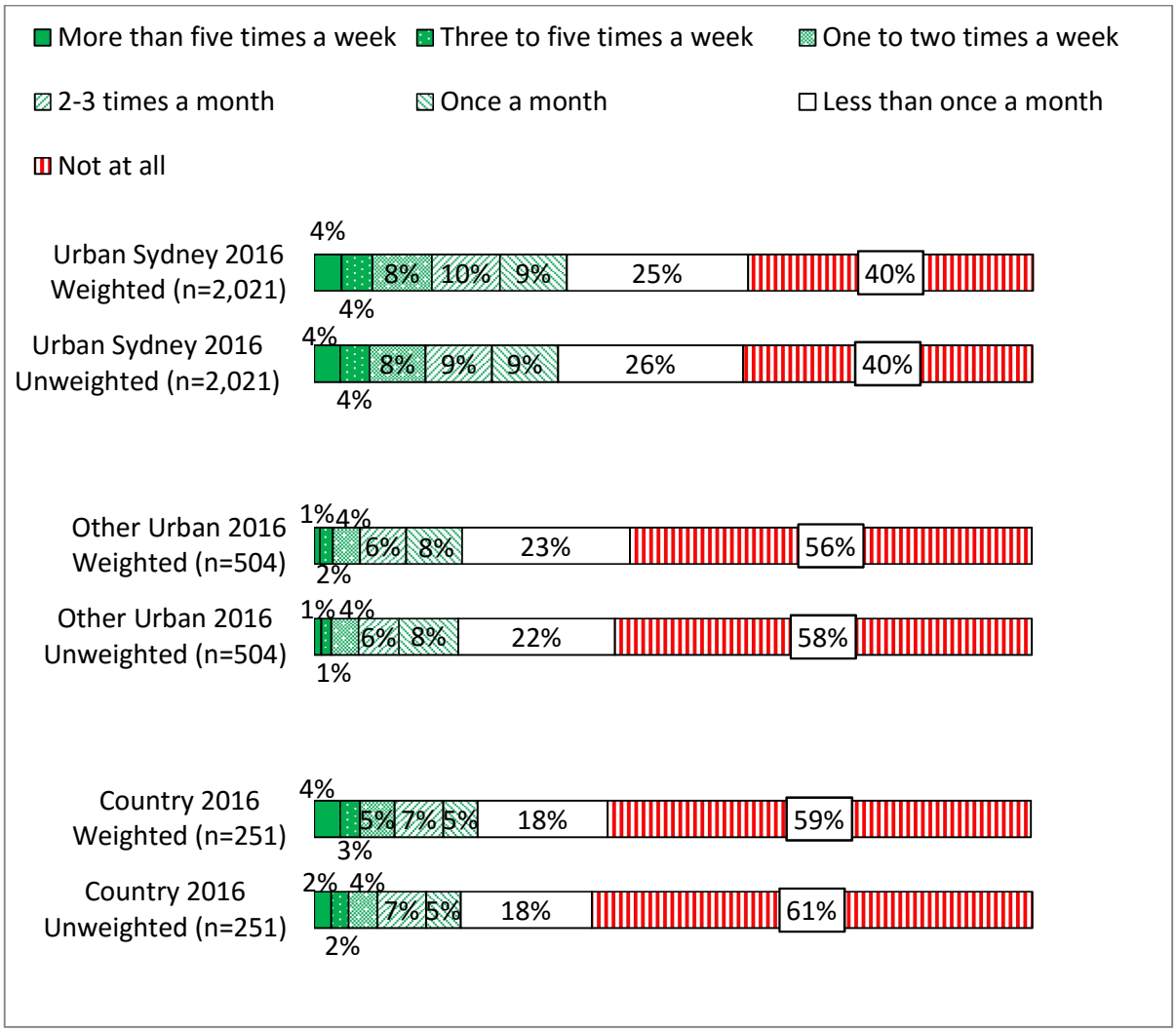
First we examine the prevalence and frequency of taxi use and identify key variables that impact on taxi use.

4.1. Frequency of taxi use

We estimate that 60% of the Urban Sydney adult population (weighted result) had used a taxi in the past six months, but 25% of the population (ie, four in ten of the taxi users) had done so less than once a month (see Figure 1). Only 16% of the population had used a taxi at least once a week and only 8% more than once or twice a week. Weighting the sample to match the population on age group by gender made little difference to the Urban Sydney results.

The Other Urban adult population is less likely to have used a taxi in the past six months (44% of the sample used a taxi in the past six months), with 23% (half the taxi users) having used less than once a month. Only 6% had used at least once or twice a week (one in ten of the users) and only 3% more than once or twice a week. While these results use weighted data to estimate the population distribution, weighting to match the population age group by gender distribution made little difference to these results.

Figure 1. Frequency of taxi use in the past six months: 2016 by location (weighted and unweighted)



Q1. In the last six months I caught a taxi in Sydney….

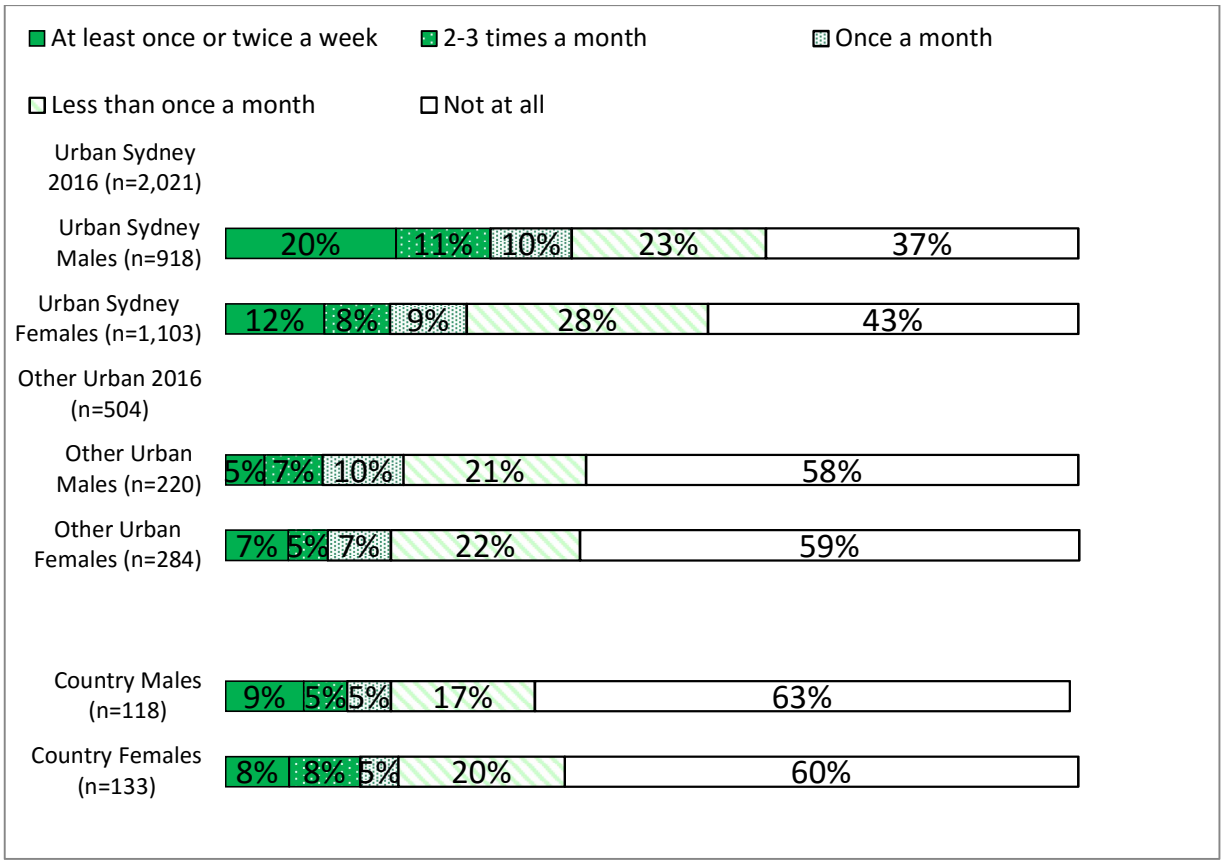
Residents of the Country towns were slightly (but not significantly) less likely to report using a taxi in the past six months than those in the Other Urban locations, with 41% of the population estimated to have done so (slightly higher than the unweighted 39% obtained in the sample). This was significantly below the prevalence of use in Urban Sydney. Country town residents who use a taxi are no less likely than residents of Urban Sydney or Other Urban areas to use a taxi less than once a month (44% of Country users, compared to 53% of Other Urban users 42% of Urban Sydney users). Country users are somewhat more likely to have used a taxi at least

once or twice a week (35% of Country town users in those towns, compared to 27% of Urban Sydney users and 15% of Other Urban users).

As shown in Figure 2:

- ✧ Urban Sydney males were more likely to use a taxi, and male users were more likely to use more frequently than Urban Sydney females and female users
- ✧ There were small differences by gender for the other two locations

Figure 2. Frequency of taxi use in the past six months: 2016 by gender (unweighted)



Q1. In the last six months I caught a taxi in [LOCATION]….

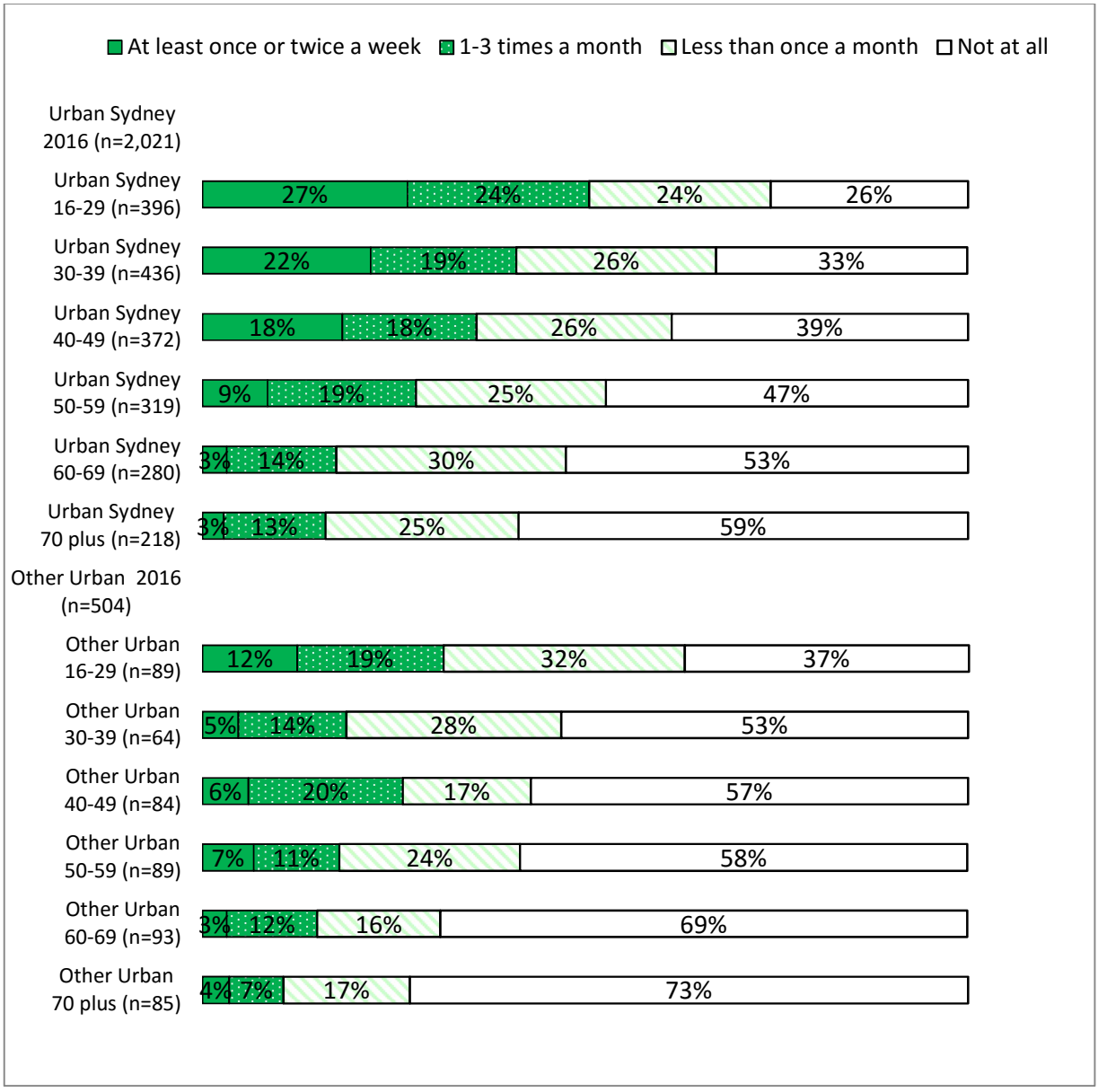
The data show that:

- ✧ Prevalence of taxi use in the last six months declines as age increases in both Urban Sydney and Other Urban locations (see Figure 3)

- The percentage of Urban Sydney taxi users (see Figure 4) doing so at least once or twice a week falls as age increases in Urban Sydney from 36% to 7% of users
- There was no clear pattern by age group among taxi users in Other Urban locations, (ranging from 20% of those aged 16-29 to 10% of those aged 30-39 and 60-69) and otherwise varying between 13% and 16%), perhaps due to the much smaller sample sizes

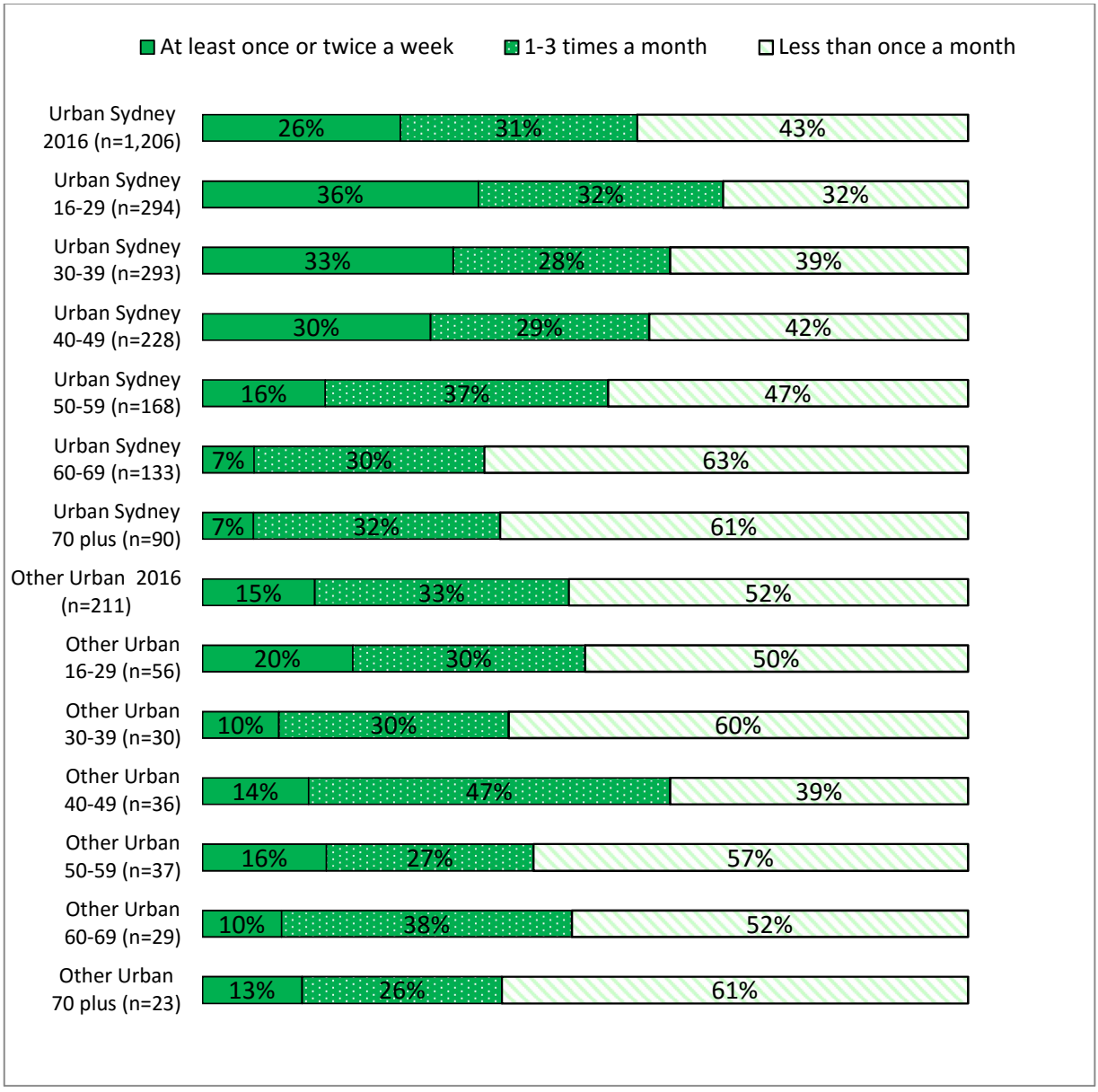
The sample bases for individual age groups in the Country towns are not large enough to produce any consistent pattern. Those aged under 50 more likely to report use at least once or twice a week (19% of n=70) than older respondents (5% of n=171) but no less likely to have used in the past six months (49% of n=70 compared to 65% of n=171).

Figure 3. Frequency of taxi use in the past six months: 2016 by age group (unweighted)



Q1. In the last six months I caught a taxi in [LOCATION]….

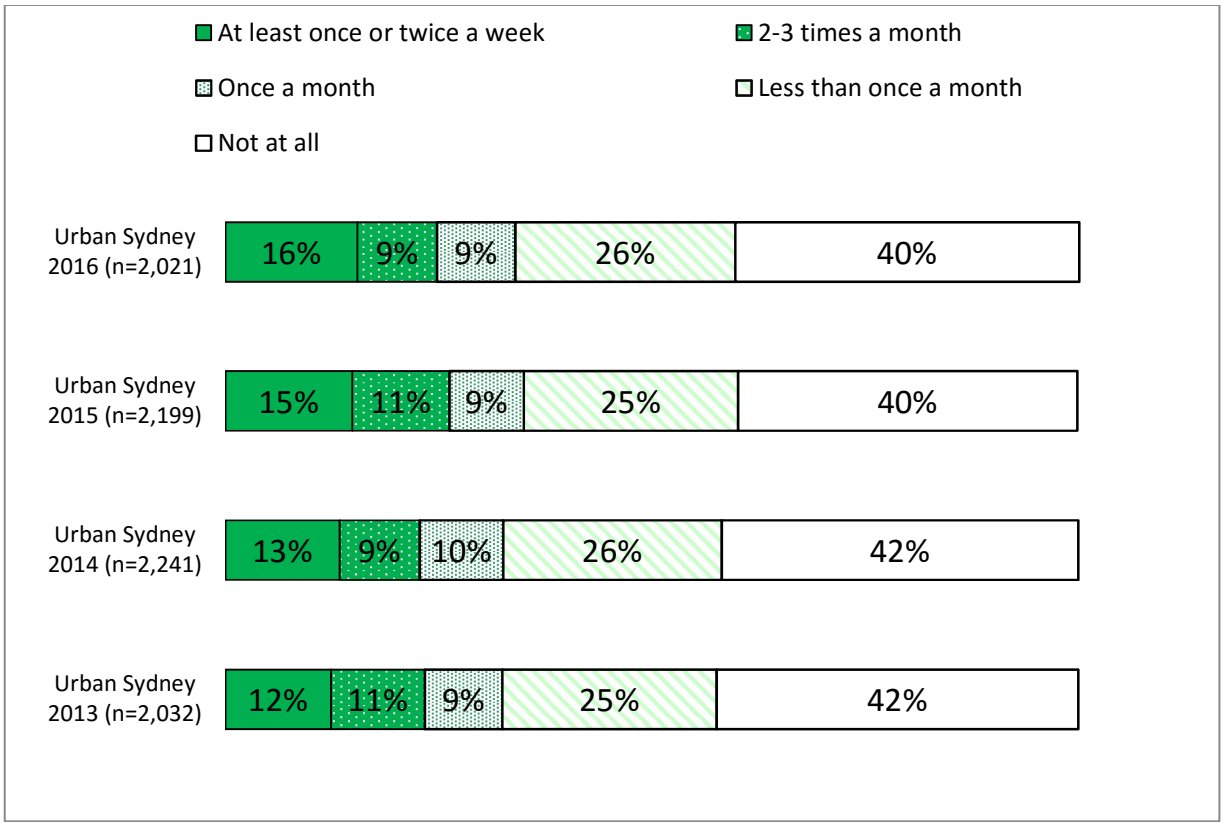
Figure 4. Frequency of taxi use by users in the past six months: 2016 by age group (unweighted)



Q1. In the last six months I caught a taxi in [LOCATION]….

There has been little change in the prevalence of taxi use in Urban Sydney since the 2013 survey, as can be seen in Figure 5.

Figure 5. Frequency of taxi use in the past six months by survey year: Urban Sydney (unweighted)

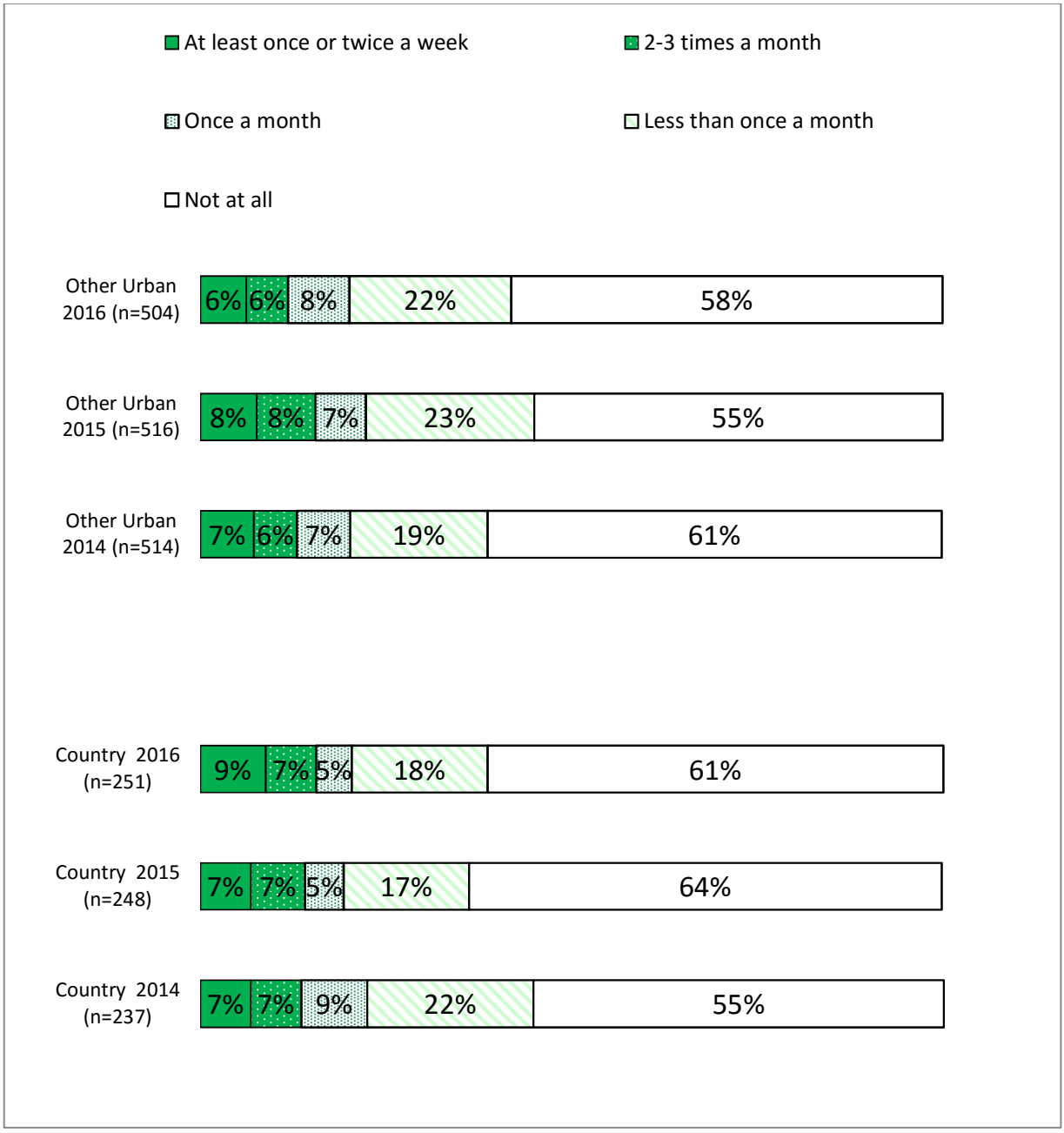


Q1. In the last six months I caught a taxi in Sydney….

Figure 6 shows no substantial or significant changes in the frequency of taxi use from 2014 to 2016 in Other Urban locations or among residents of the Country towns.

The small, but statistically significant differences previously reported between results for 2012 and later years cannot be relied on as the response scale was changed and this could have produced the shift in the reported prevalence of use.

Figure 6. Frequency of taxi use in the past six months by survey year: Other Urban and Country (unweighted)



Q1. In the last six months I caught a taxi in Sydney….

Taxi use and use of other point to point modes

Figure 7 shows that users of other modes of point to point transport are more likely than non-users to have used a taxi and to have done so more often. More detailed breakdowns

by frequency of use of the other modes (not shown) indicate that the more often another mode is used, the more often a taxi is used.

The n=667 Urban Sydney residents (33%) who had used a ride sharing service in the past six months are more likely to have used a taxi (92%) than those who had not used any ride sharing service (43%), and there is a clear association been making use of a ride sharing service and more frequent use of a taxi.

The n=438 Urban Sydney residents (22%) who had used a car sharing service in the past six months are also much more likely (94%) to have used a taxi than those who had not used a ride sharing service (50%) with a clear trend for those who used a ride sharing service to report more frequent taxi use.

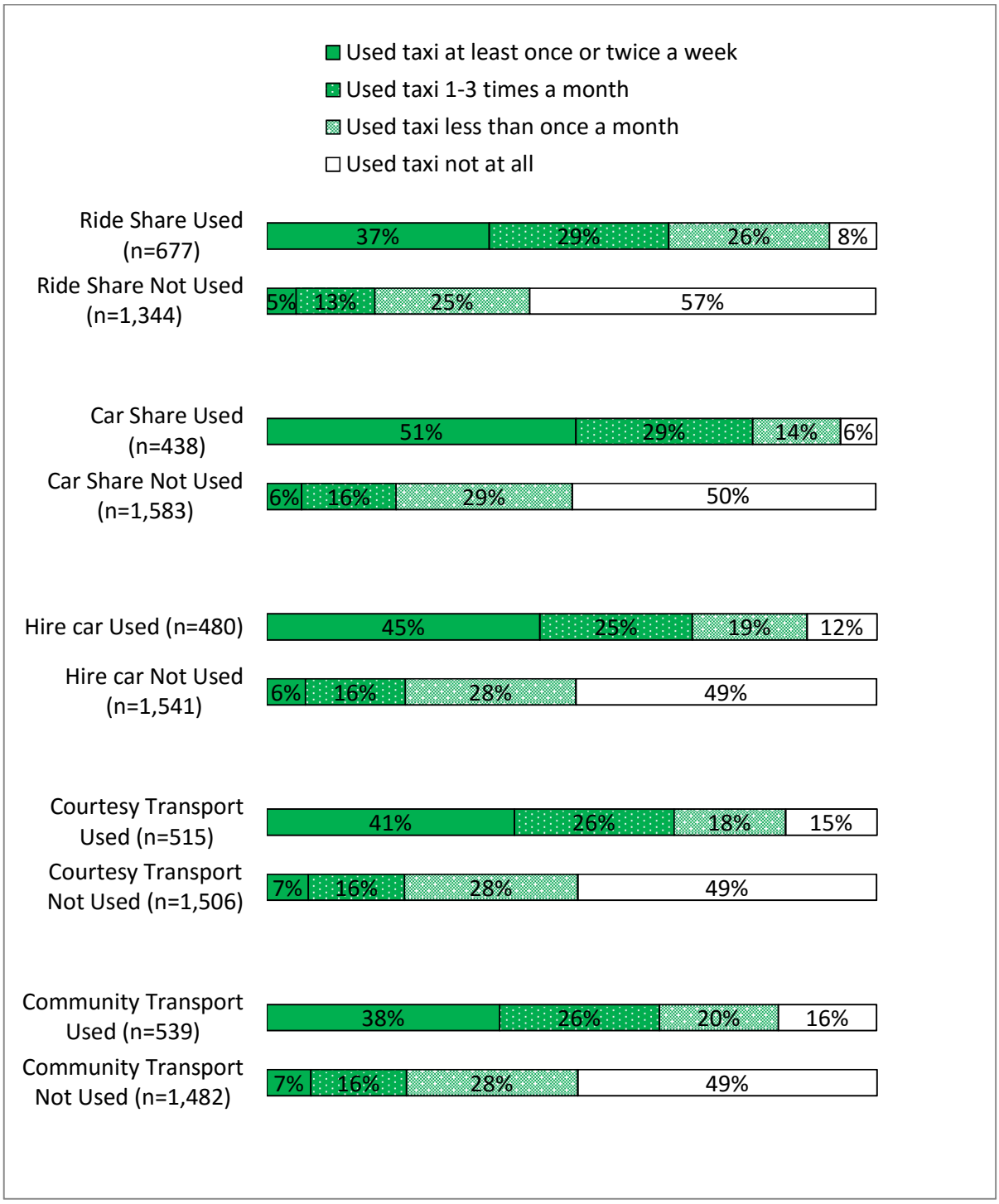
The n=480 Urban Sydney residents (24%) who had used a hire car in the past six months are much more likely to have used a taxi (88%) than those who had not used a hire car (51%) and those who had used a hire car are likely to report more frequent taxi use.

The n=515 who have used courtesy transport in the past six months (25%) are more likely to have used a taxi (84%) than non-users (51%) and to report more frequent taxi use.

The n=539 who have used community transport in the past six months (27%) are more likely to have used a taxi (84%) than those not using community transport (50%), and to report more frequent taxi use.

The consistent pattern of high reported prevalence of taxi use among those using any of the alternative services, and of more frequent reported taxi use among users of each of the alternative services might reflect a high level of need for point to point transport services driving more frequent use of all modes. It is also possible that at least some of the strong relationships shown across modes might be due to scale-use habits rather than to real differences in frequency of use. Self-completed surveys (whether online or on paper) are vulnerable to respondents developing a "default" or habitual response when asked to rate several behaviours on the same scale. Reports of the frequency of a behaviour are correlated with independent assessments of frequency, but are subject to recall errors and uncertainty. Respondent who are unsure of the response they should give tend to give similar replies to those given to earlier ratings using the same scale.

Figure 7. Frequency of taxi use in the past six months: 2016 Urban Sydney by whether used other point to point modes



Q1. In the last six months I caught a taxi in Sydney….

Taxi use and annual household income

Reported household income also affects taxi use.

Figure 8 shows the distribution of the frequency of taxi use broken down by reported household income.

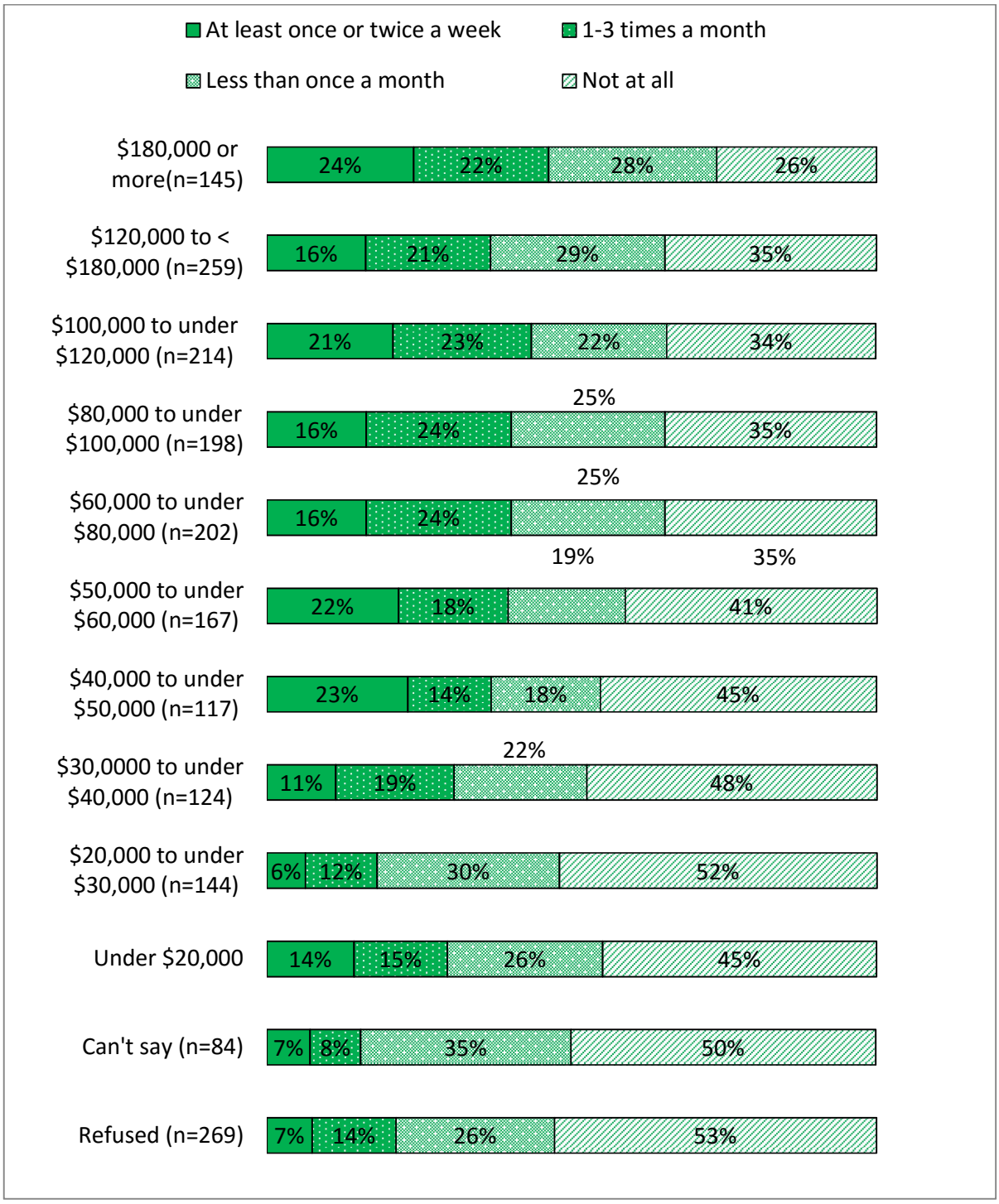
There is a consistent trend for high household income to be associated with being more likely to have used a taxi in the past six months, and (although less consistent) to have used a taxi more often, with one exception.

Those in the highest household income band ($180,000 per year or more) are the most likely to report taxi use (74%) and those in the $20,000 to under $30,000 band the least likely (48%).

Those in the lowest income group (household income under $20,000 per year) are a little more likely than those in the next income group to report they used a taxi in the past six months (55% compared to 48%), and to report more frequent use.

Those who could not say what their household income was or refused to give it were at the lower end of taxi use (50% and 47% reporting use in the past six months). This use prevalence was very close to that for each of the three lowest income bands, suggesting that declining to give or being unable to give an income is more typical of low income households.

Figure 8. Frequency of taxi use in the past six months: 2016 Urban Sydney by reported household income



Q1. In the last six months I caught a taxi in Sydney….

Number of cars in household

Use of taxis also varies with the number of cars in the respondent's household. The percentage of Urban Sydney residents that report use of a taxi in the previous six months is:

- 66% of n=290 with no car in the household
- 62% of n=987 with one car in the household
- 58% of n=681 with two cars in the household
- 54% n=540 with three or more cars in the household

Those with no car in their household are about as likely to report using a taxi at least once a week (15%) as those with one car in the household (16%) and no more likely to report using a taxi at least once a week if there is more than one car in the household, (15% if two cars and 11% if three or more). None of these differences are statistically significant.

There is little variation by the number of cars in the household in use of a taxi at least once a month:

- 30% of n=240 with no car in the household
- 35% of n=916 with one car in the household
- 34% of n=644 with two cars in the household
- 30% of n=221 with three or more cars in the household

Effects of disability and access to subsidy

In 2016, (see Figure 9) those in Urban Sydney with a disability (n=197) are significantly more likely than those without a disability (n=1,824) to use a taxi at least once or twice a week (23% compared to 15%), and to have used a taxi (66% compared to 59%).

The base number of users with a disability receiving a subsidy is low (n=53).

Of those receiving a subsidy:

- 15% used taxis more than five times a week
- 60% used at least once or twice a week (sum of proportions of those who use taxis one to two times a week or more; see Figure 9).
- 85% have used a taxi in the past six months

Among those with a disability who do not receive a subsidy (n=144):

- 2% used taxis more than five times a week
- 9% used a taxi at least once or twice a week (sum of proportions of those who use taxis one to two times a week or more; see Figure 9)
- 59% have used a taxi in the past six months

Among those with no disability (n=1,824):

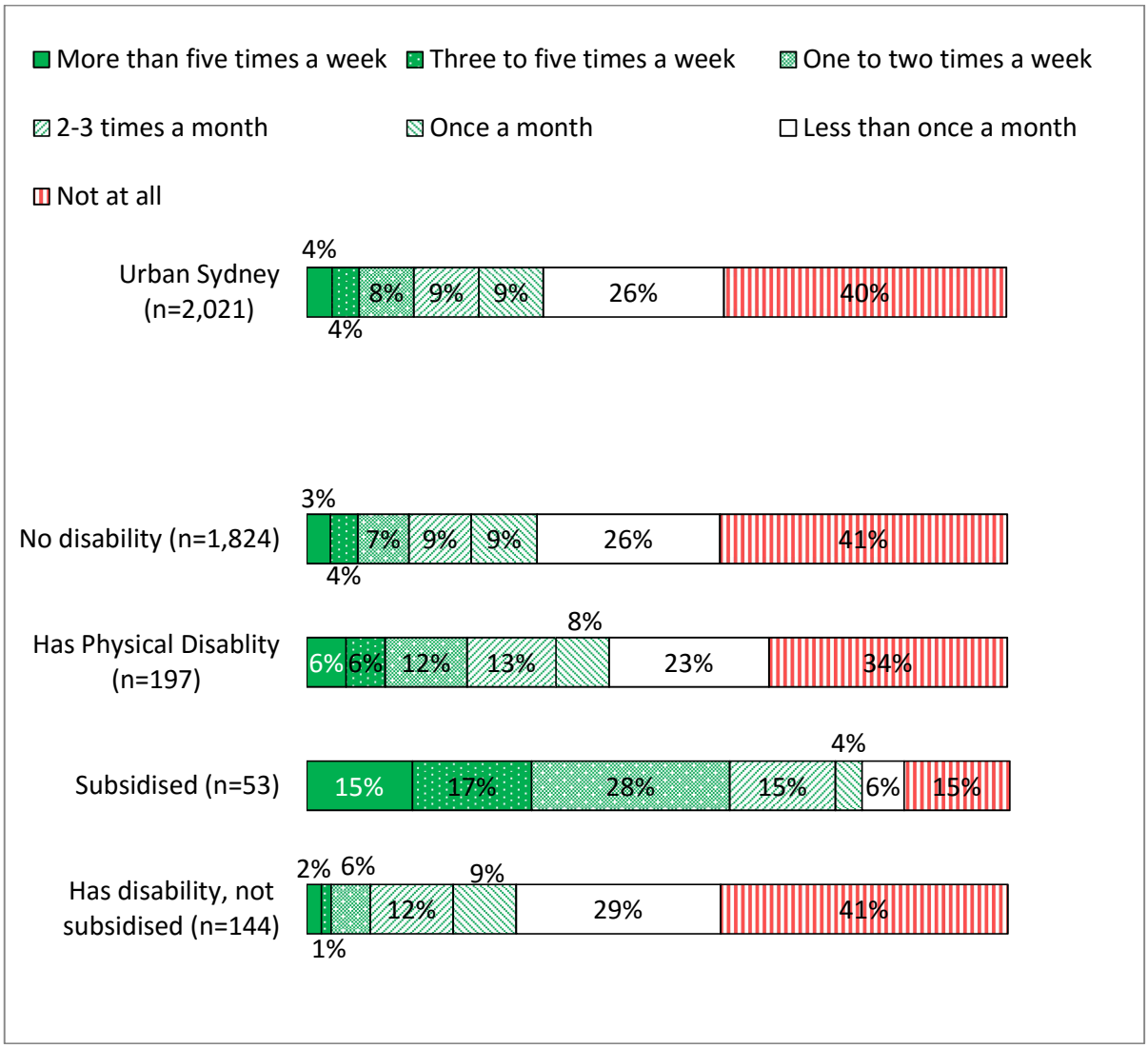
- 3% used taxis more than five times a week
- 15% used a taxi at least once or twice a week (sum of proportions of those who use taxis one to two times a week or more; see Figure 9)
- 59% have used a taxi in the past six months

Thus there is no significant difference in use between those with no disability and those with a disability who do not have a subsidy, and a significantly and substantially higher prevalence and frequency of use among those with a disability who receive a subsidy.

Only 18 Urban Sydney respondents out of 197 with a disability reported that they had to use a wheelchair accessible taxi so it is difficult to draw any conclusions about the effect of this on frequency of use. While 8 of the 18 in Urban Sydney (and 8 of 23 in the total sample) report use at least once or twice a week, 4 of 18 in Urban Sydney report not using a taxi at all in the past six months (7 of 23 in the total sample) and the others report using less than once or twice a week. In the total sample, those who required a wheelchair taxi are significantly ($p<.001$) more likely than others with a disability to report using a taxi at least once or twice a week (34% compared to 17%), perhaps because they are more likely to have a subsidy for use (56% compared to 21%).

These results are broadly similar to those found in previous surveys, with one exception: the indications found in 2015 that those with a disability and no subsidy might make less use of taxis than those without a disability were not confirmed in the 2016 survey.

Figure 9. Frequency of taxi use in the past six months: 2016 Urban Sydney by disability and whether subsidised



Q1. In the last six months I caught a taxi in Sydney….

Summary of influences on taxi use

As found in 2012, 2013, 2014 and 2015, the 2016 results confirm that the frequency of taxi use is related to:

- Gender, with more males using and male users using more often
- Age group, with the percentage using declining with increasing age, and younger people using more often
- Income with a general trend for more of those on higher incomes to report use
- Receiving a subsidy for taxi use due to having a disability producing much higher use, while having a disability without having any subsidy produced no difference in use from those without a disability
- Use of other modes of point to point transport including ride share, car share, hire car, courtesy transport and community transport being associated with more prevalent use of taxis and more frequent use of taxis

Having two or three or more cars in the household somewhat reduces the prevalence of taxi use but not the frequency of use among users.

There has been very little evidence of change in the prevalence or frequency of taxi use since 2013. Slightly different levels of use in 2012 might be due to differences in the rating scale used to assess the level of use.

4.2. Use of other paid point to point services

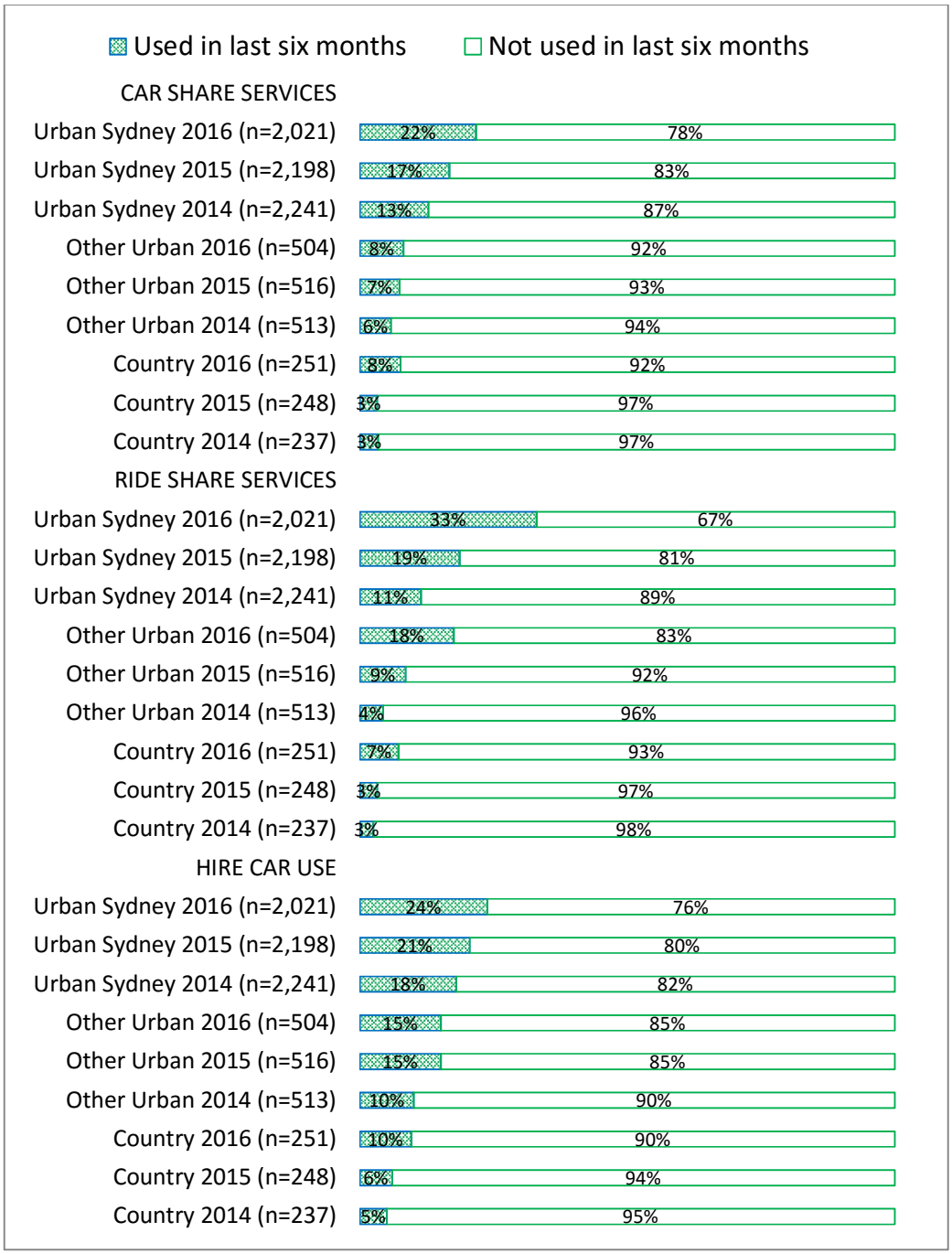
Figure 10 shows the prevalence of use in the last six months of three alternatives to use of a taxi for paid point to point transport: car share services, ride share services and hire car services. Questions about car share and ride share services were added in 2014, so results are shown only for the past three years.

Car share and ride share services are still available primarily in Urban Sydney, although some use is reported in Other Urban locations. Those reporting use of ride share and car share in Country towns might be recalling use during visits to Sydney.

Until 2016, use of hire cars was more prevalent than use of either car share or ride share services. In Urban Sydney in 2016, the prevalence of car share service (22%) use moved up to be very close to the prevalence of using hire cars (24%), and the prevalence of using ride share services jumps to be well above the prevalence of using either of the other two alternatives to taxi use (33%).

Even in Other Urban areas, the prevalence of ride share use is at least as common at 18% as use of hire cars (15%). Use of car share services remains much lower at 8%. A surprising 8% of Country town respondents also report use of car share services in 2016, similar to the reported use of ride share (7%) and only slightly lower than the reported use of hire cars (10%).

Figure 10. Use of other paid point to point transport services in the last six months by location, 2014 to 2016

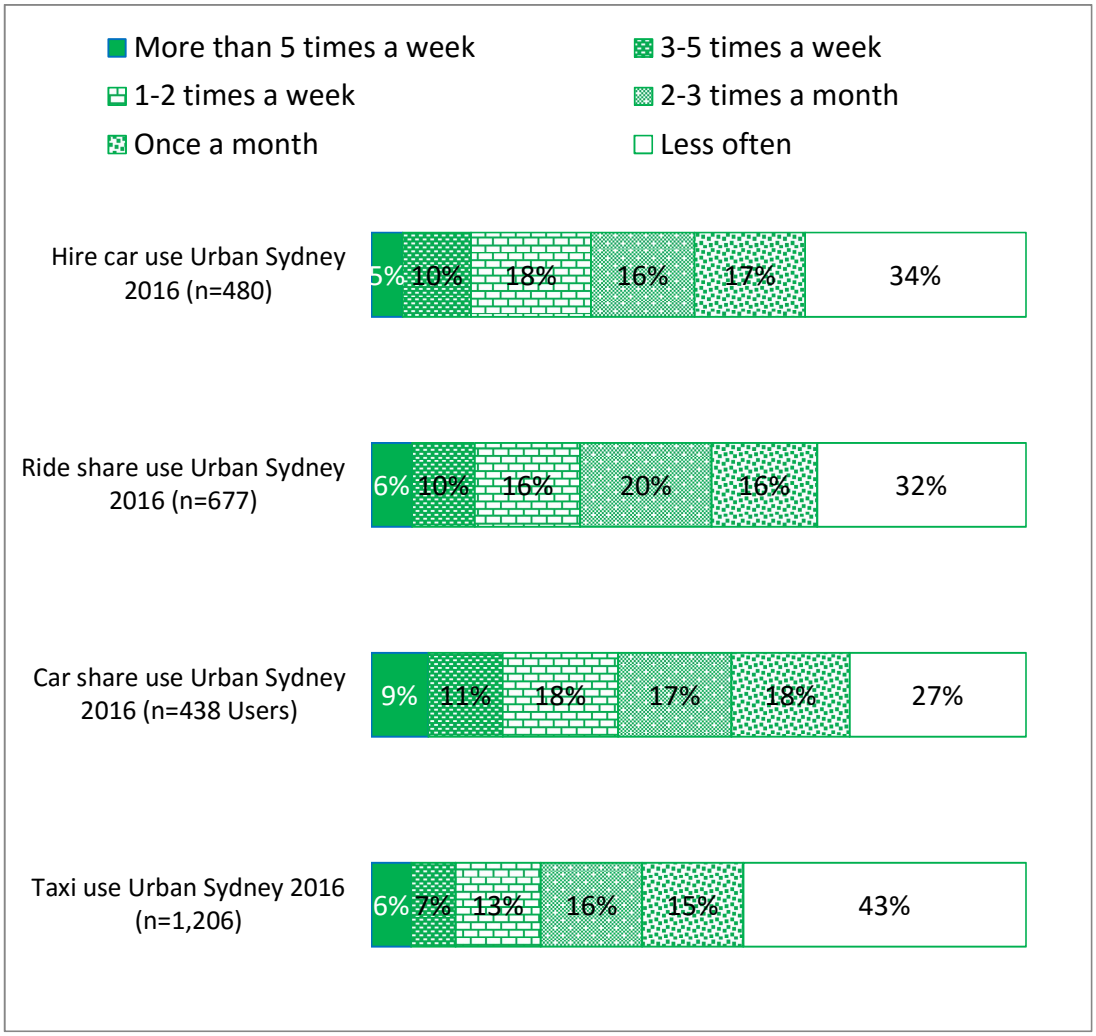


Q47. In the last six months I have used a car sharing service (for example, GoGet, GreenShareCar, Car Next Door or Hertz 24/7) …
Q49. In the last six months I have used a ride sharing service (for example, UberX or RideSurfing) …
Q42. In the last six months I have used a hire car with a driver …

The frequency of use among Urban Sydney users of each type of service in 2016 can be seen in Figure 11.

Not only has the prevalence of ride share service use passed that of hire cars and surged well above that of car share services, the frequency of use among users is just as high as for hire cars. Although not as widely used, the frequency of car share use among users is as high as the frequency of ride share and hire car use among their users. Users of these alternatives to taxis make use of their preferred service somewhat more often than users of taxis, with 32% to 38% of users of an alternative service doing so at least once or twice a week, compared to 26% for use of taxis by taxi users.

Figure 11. Frequency of using other paid point to point services (Urban Sydney users only, 2016)



Q42. In the last six months I have used a hire car with a driver … (Base: Users)

Who uses paid alternatives

Users of the paid alternatives are mostly taxi users. Users of each alternative service are much more likely than non-users to make use of taxis. Taxis are used by:

- 92% of ride share users and 43% of those not using ride share services
- 94% of car share users, and 50% of those not using car share services
- 89% of hire car users, and 51% of those not using hire cars

This suggests that the first step to use is the need for point to point transport and willingness to pay for it.

Users of the alternative paid modes are taxi users who do not see taxis as offering good value for money.

In Urban Sydney in 2016, taxi users who consider taxis to generally be good value for money are less likely to use each of the alternatives than those who consider taxis do not offer good value for money:

- Ride share is used by 50% of those taxi users who consider taxi use offers good value, and by 57% of those who consider taxis do not offer good value
- Car share is used by 27% of those taxi users who consider taxi use offers good value, and by 51% of those who consider taxis do not offer good value
- Hire cars are used by 28% of those taxi users who consider taxi use offers good value, and by 53% of those who consider taxis do not offer good value

Thus lack of perceived value offered by taxis is strongly associated with use of car share and hire car services and somewhat less associated with use of ride share services.

As noted earlier, in Urban Sydney, taxi use is slightly more prevalent among males than females (63% compared to 57%). There is at most a weak relationship between gender and use of ride share services (used by 35% of males and 32% of females), a somewhat stronger effect for car share service (27% of males and 17% of females) and hire car services (29% of males and 19% of females).

Use of each type of service declines with age group:

- Taxi users form 74% of 16-29 year olds in Urban Sydney in 2016, and only 41% of those aged 70 and over
- Ride share use is reported by 63% of 16-29 year olds and only 6% of those aged 70 and over
- Car share use drops from 46% of 16 to 29 year olds to only 2% of those aged 70 or over
- Hire car use falls from 45% of those aged 16-29 to 10% of those aged 70 and over

It appears that use of the alternative services first depends on need for point to point transport rather than using public transport. Use is somewhat supported by perceptions that taxis do not offer good value, and is much stronger among younger people and slightly more common among males. The variation by age group might be due to greater willingness to try new services, greater awareness of new services, or being more comfortable with the use of booking apps or other online booking processes.

4.3. Use of free point to point services

In 2015 further questions were added to assess the frequency of use of courtesy transport and community transport.

Figure 12 shows the prevalence of using courtesy car and community transport services by survey year.

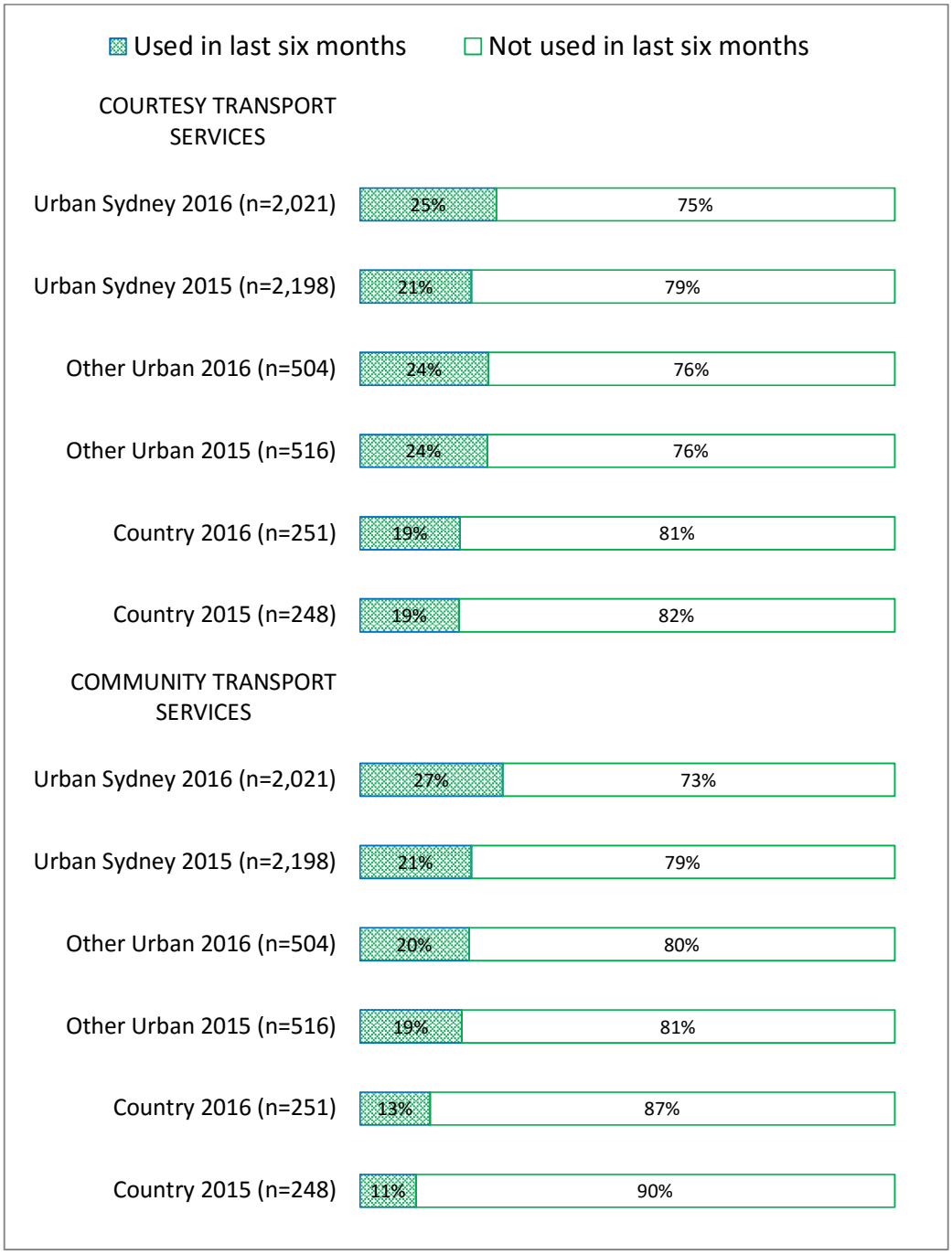
Use of courtesy transport in 2016 (25%) is slightly higher than in 2015 (21%). Urban Sydney has the highest use of courtesy transport services in 2016 at 25%. This is quite similar to use in Other Urban locations in both 2016 and 2015 (24%) and higher than in Country towns (19% in both years).

Community transport use is slightly higher in Urban Sydney in 2016 (27%) than in 2015 (21%). Prevalence in the Other Urban locations at 19% (2015) and 20% (2016) is stable and slightly lower than in Urban Sydney. Use of community transport (11% in 2015, 13% in 2016) is somewhat lower than in the other regions (19% to 27%).

Men were more likely than women to report using courtesy transport (32% compared to 20% of women in Urban Sydney in 2016). Use declined from 43% among those aged 16-29 to 16% among those aged 70 or more. Use is also much higher for those using taxis at least once or twice a week (67%) than those using taxis one to three times a month (36%) and falls to

18% of those using taxis less than once a month and 9% of those never using taxis.

Figure 12. Use of free point to point services in last six months by location 2016 and 2015



Q51. In the last six months I have used courtesy transport provided by a pub, club or other venue
Q53. In the last six months I have used community transport instead of a taxi because ….

Community transport is also more likely to be used by men (33%) than women (21%), and use declines with age from 49% of those aged 18-29 to 12% of those aged 60-69, but then increases to 18% among those aged 70 or more.

More frequent taxi use is also associated with use of community transport. Those using taxis at least once or twice a week are the most likely to report use of community transport (66%), falling sharply to 38% of those using a taxi one to three times a month, 20% of those using a taxi less than once a month, and 11% of those who have not used a taxi in the past six months.

The patterns suggest that the first "driver" of use across all these forms of transport is a need that is not effectively met by public transport or use of a private vehicle.

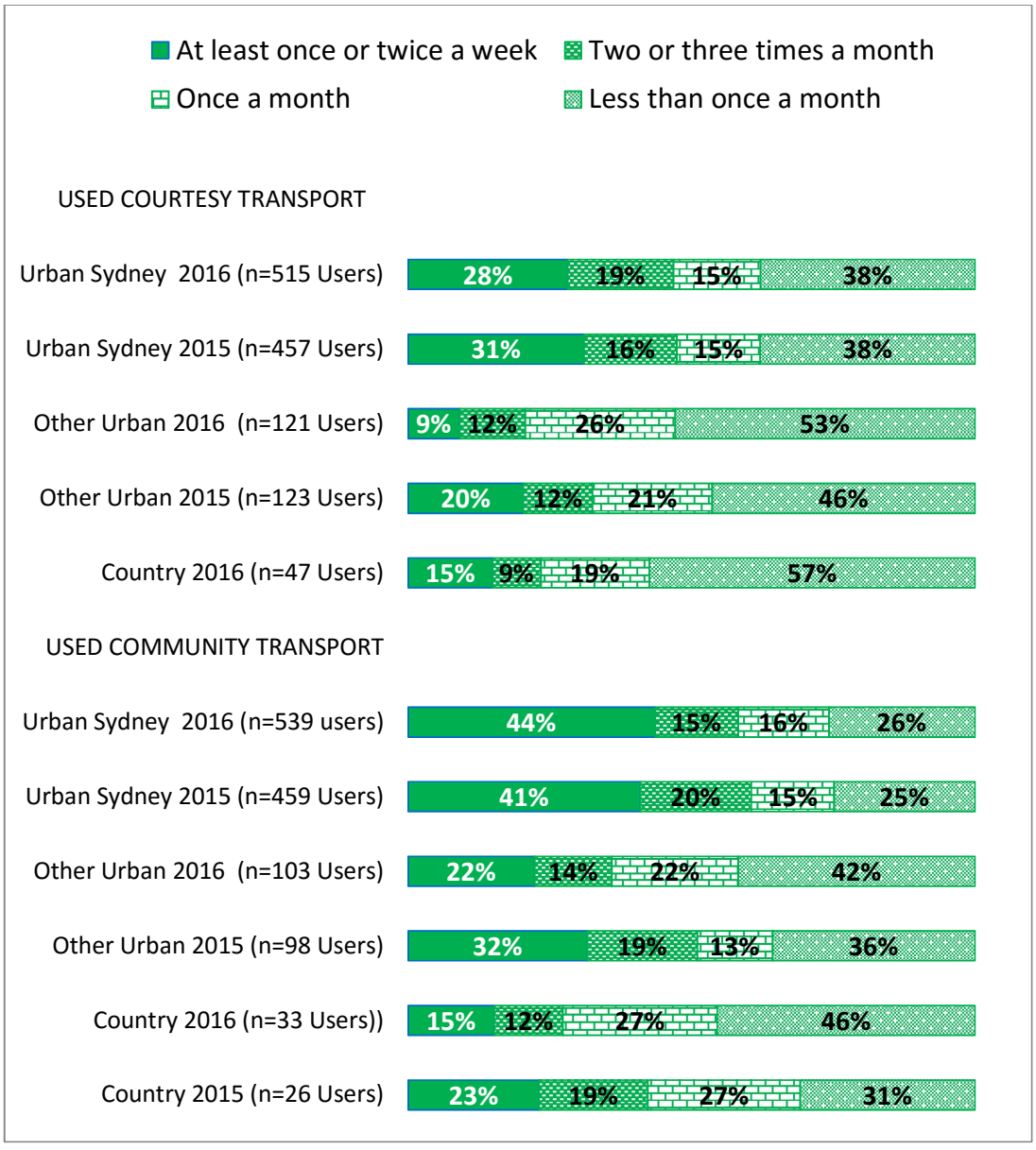
Figure 13 shows the frequency of use by users for courtesy transport and community transport.

Users of courtesy transport and community transport in Urban Sydney make more frequent use of these services than users in Other Urban locations, and Urban Sydney users of community transport make more frequent use of this service than users in the Country locations.

There is little change from 2015 to 2016 in how often Urban Sydney courtesy transport users make use of this service. There is evidence that use has become less frequent among users in Other Urban locations..

Urban Sydney users of community transport in 2016 report a similar frequency of use to Urban Sydney users in 2015. Frequency of use in Other Urban areas shows a trend toward less frequent use than in 2015, despite the prevalence of use being similar. The similar drop in frequency of use in the Country towns is consistent with a chance variation given the small samples of Country users.

Figure 13. Frequency of using courtesy transport and community transport services in last six months (users only)



Q51. In the last six months I have used courtesy transport provided by a pub, club or other venue
Q53. In the last six months I have used community transport instead of a taxi ….

Figure 14 shows the levels of endorsement of reasons for use of courtesy transport and community transport services for 2016 by region.

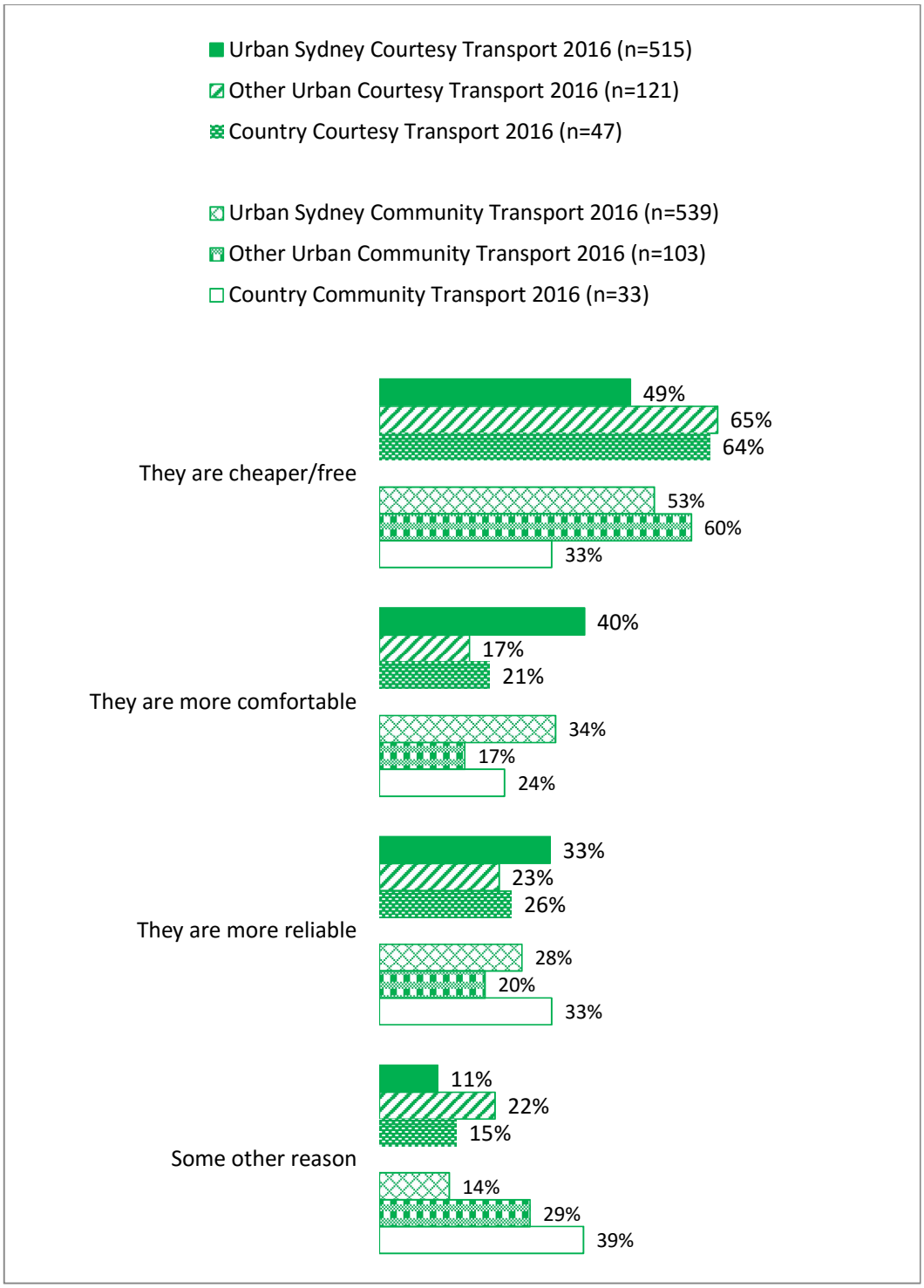
While there is considerable variation by location and type of service, the consistent leading reason for use is being cheaper (prompted). In 2015 it was found that many of those who indicated they had some other reason explained this as the service being free. When combined with being cheaper, this dominated the reasons for use. In 2016, those who indicated they had some other reason were not asked to explain what this was. If the reason that would be volunteered in 2016 was similar to those given in 2015, then again the combination of cheaper or free would lead even more clearly.

In future rounds of the survey, at least for these free forms of transport, the prompted reason should be amended to say "cheaper or free".

Comfort is generally the reason endorsed next most widely in Urban Sydney for use of courtesy transport, followed by reliability. In Other Urban and Country locations, reliability was more often endorsed than comfort.

Users of community transport in the Country locations report being cheaper and being more reliable equally often as their reason for use, followed by comfort. However the samples are quite small, and if many of those indicating they have other reasons considered being free as their reason, then being cheaper or free would lead even in the small Country user sample.

Figure 14. Reasons for using courtesy or community transport by location 2016



Q52 I used the community transport service because …
Q54 I used the courtesy transport service because …
NOTE: Treat with caution where n<50. Where n<20, result not shown.

5. Other aspects of taxi use

The questionnaire covered a wide range of other aspects of taxi use and of user opinions about taxis and experience of taxi use. This section of the report summarises the key results.

5.1. Change in use

All respondents were asked whether they were using taxis more, the same or less in the past twelve months than in the previous twelve months. The results for the total Urban Sydney sample in 2016, 2015, 2014 and 2013, with a break within the Urban Sydney 2016 sample by reported frequency of use in the past six months are all shown in Figure 15.

Urban Sydney respondents are slightly more likely to report their use of taxis has decreased (24%) than to report their use of taxis has increased (15%). The difference of nine percentage points in the percentage of Urban Sydney respondents reporting increased use (15%) and decreased use (24%) in 2016 is statistically significant. This pattern is consistently seen in the 2013, 2014 and 2015 Urban Sydney results and is larger in 2016 than in any of the previous years when the question was asked (3 to 7 percentage points). The results suggest that Urban Sydney taxi users are more likely to report they have decreased use than increased use, but that the difference is still not large in absolute terms.

Similar comparisons for Other Urban and Country respondents showed the same trend, but the differences are smaller and not statistically significant (see Figure 16).

There are no differences by year large enough to suggest real changes over time in responses to this item.

As was found in 2013, 2014 and 2015, the balance between increased and decreased use is strongly related to the reported frequency of use.

- The percentage reporting no change in use increases rapidly from those using most often (only 8% of n=73) to those who report they never used in the past six months (87% of n=815 reporting no change).
- The balance between those reporting increased use and decreased use also shifts markedly, increased use being …

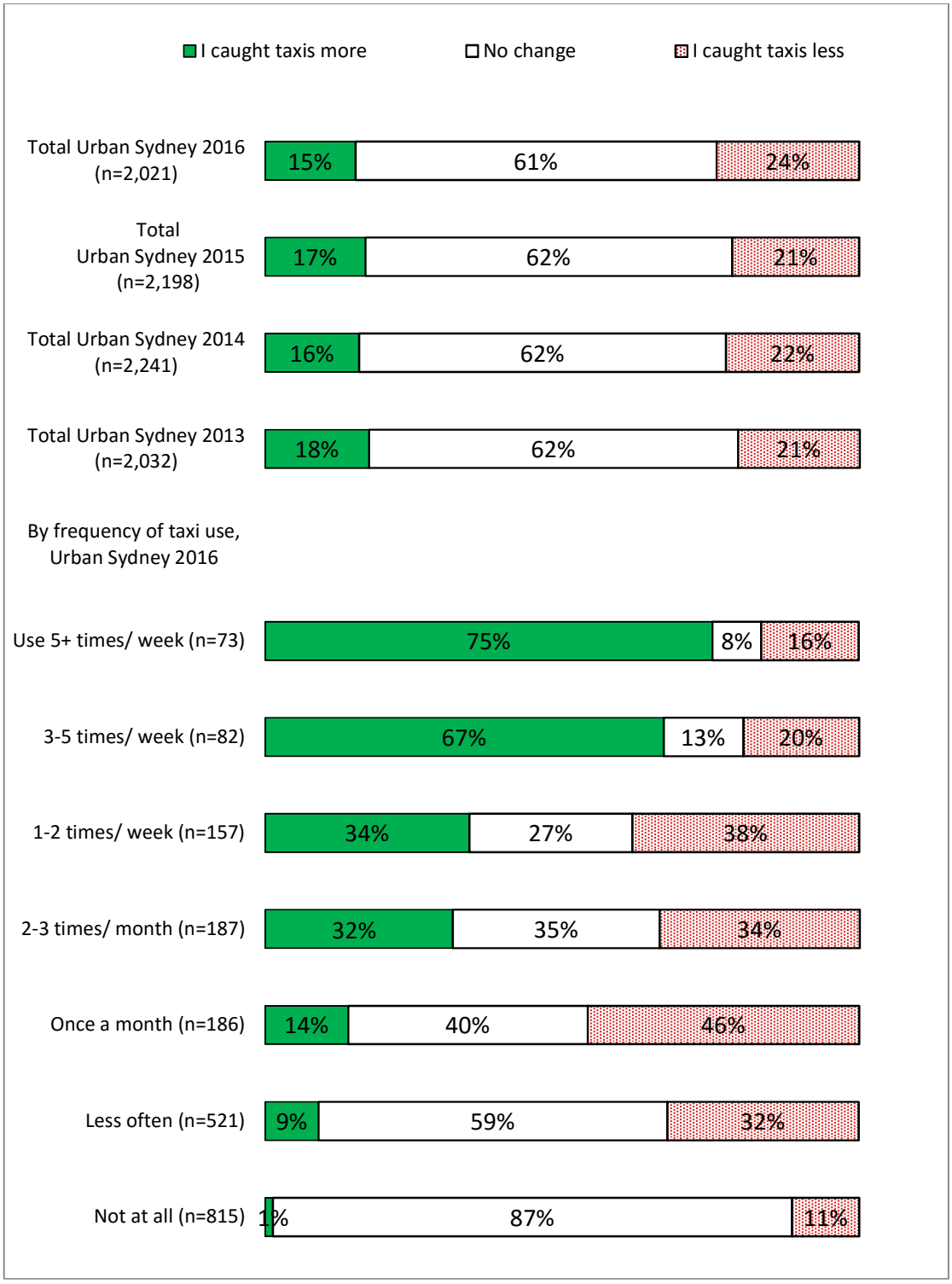
- over four times as common among those using a taxi five or more times a week (75% using more compared to 16% using less)
- almost equal among those using once or twice a week (34% more, 38% less) and those using two to three times a month (32% more and 34% less).
- around one third of those reporting decreased use among those using once a month (14% compared to 46%) or less than once a month (9% compared to 32%)
- much lower (1%) than using less (11%) in the past year compared to the previous year among those not using a taxi in the past six months.

Heavy users are more likely to believe their use is increasing, while light and non-users are more likely to believe their use is declining. This effect has also been found consistently in each previous survey.

It is difficult to say whether this trend reflects a real difference, or people who use taxis more often tend to assume their use must be increasing, while people who rarely use assume they must be using less.

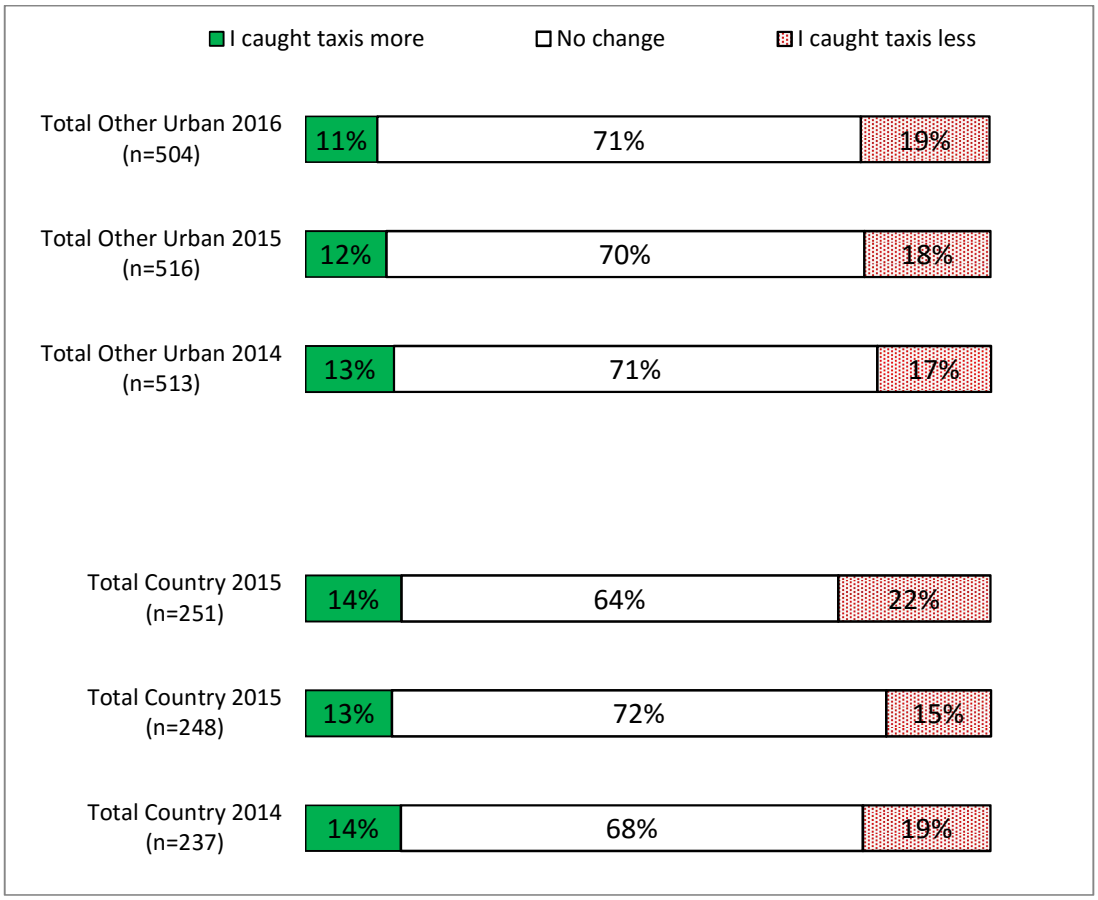
If the perceived trend is real, it would be expected that the reported frequency of use would decline over time. However, this has not happened. Thus it seems more likely that the pattern is due to heavier users assuming they must be using more, while light users assume they must be using less. This type of effect is often found with items asking about perceived change in behaviour.

Figure 15. Change in frequency of taxi use by frequency of use by survey year for Urban Sydney



Q2. Compared to the previous 12 months, in the last 12 months ….
I caught taxis more/ I caught taxis less/ There has been no change in how often I have caught taxis

Figure 16. Change in frequency of taxi use by frequency of use by survey year for Other Urban and Country samples



Q2. Compared to the previous 12 months, in the last 12 months ….
I caught taxis more/ I caught taxis less/ There has been no change in how often I have caught taxis

5.2. Reasons for change in use

Those who reported increased use in the past twelve months compared to the previous twelve months were asked to endorse all the reasons for this change from a list of suggested reasons (see Figure 17 for Urban Sydney results, 2013 to 2016). The others who reported decreased use were asked to choose all relevant reasons from a distinct list (see Figure 18 for Urban Sydney results, 2013 to 2016).

Reasons suggesting increased need (going out more; having less access to alternatives) combine to form the most often given reason for increased use (around 60% combined). Improved service (expecting a shorter wait or having more confidence in a booked taxi turning up; easier booking using an app; and improved service when booking by telephone) all showed increases. These two broad sets of reasons account for most of the replies.

The percentage having a reason not included in the list has fallen considerably from earlier years.

Other reasons are each given by under 20% of those asked.

The sample sizes for those who reported increased use in Other Urban (n=53) and Country (n=30) locations limited confidence in the findings. In summary, less access to alternatives such as a car (27% and 28%) and going out more (25% and 40%) are the most prominent reasons. Those outside Sydney are also more likely to say they had other reasons not included in the listed options (30% in Other Urban and 43% in Country locations).

Figure 18 shows that for Urban Sydney respondents in all four years (2013 to 2016), increased cost is the most widely endorsed reason for reduced use followed by reasons suggesting reduced need (going out less; better access to a car; improved public transport at the times when it is needed) and reduced capacity (lower disposable income) among those who reported they use taxis less.

Those in Urban Sydney giving "using ride share services such as UberX instead" jumped from 14% in 2015 (when this reason was listed for the first time) to 27% in 2016. This reflects the increase in reported use of ride share services such as Uber, up from 11% in 2014 and 19% in 2015 to 33% in 2016 (see Figure 10).

Few indicated they had other reasons apart from those listed (7-9%).

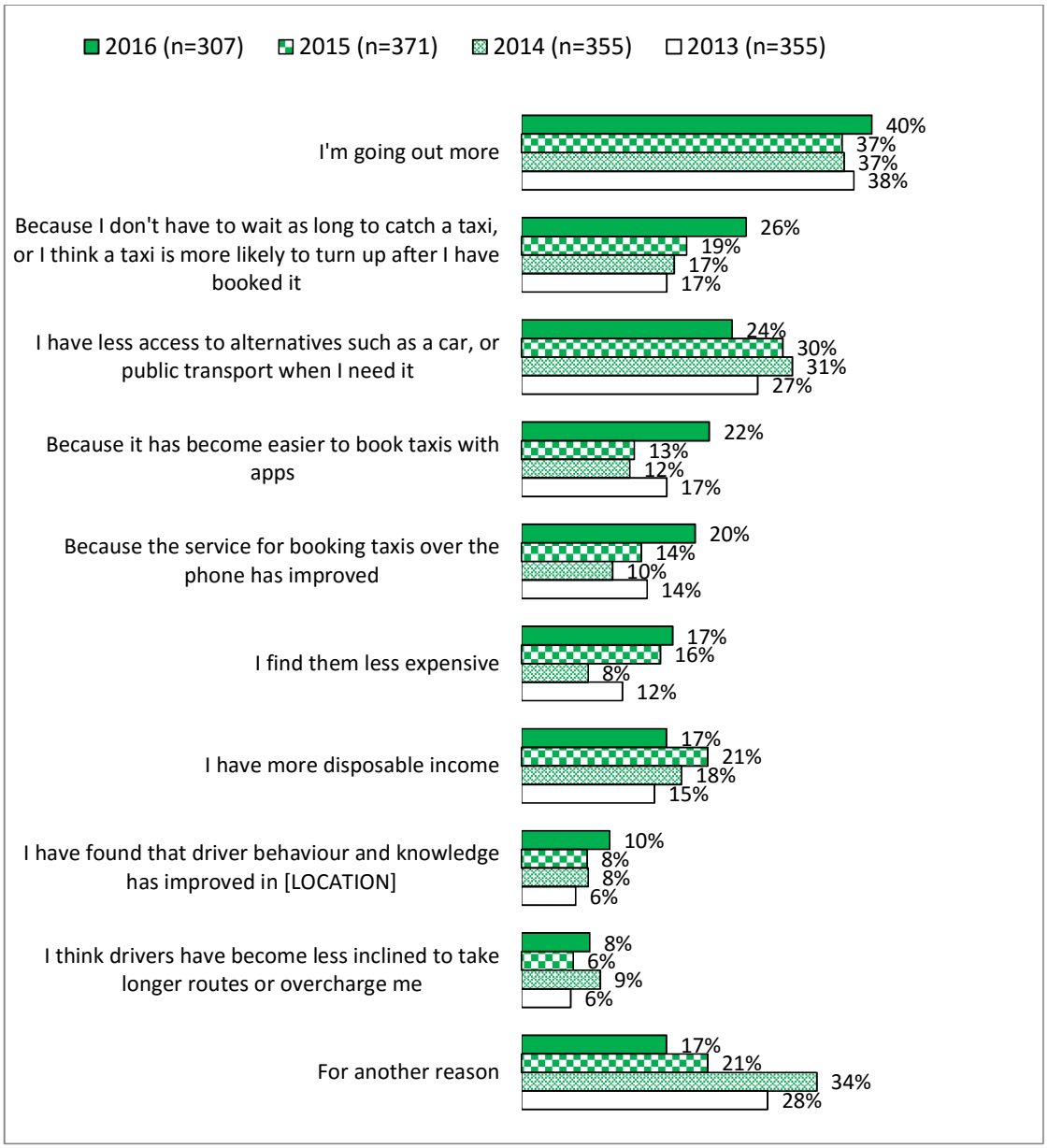
The sample sizes for those reporting decreased use in Other Urban and Country locations in 2016 are small enough to limit confidence in the reliability of the results (n=95 for Other Urban and n=35 for Country). For both, the most widely selected reasons are (Other Urban followed by Country results):

- finding taxis more expensive (42% and 43% compared to 52% in Urban Sydney)
- better car access (35% and 34% compared to 18% in Urban Sydney)
- going out less (39% and 54% compared to 28% in Urban Sydney)
- having less disposable income (25% and 23% compared to 18% in Urban Sydney)
- making more use of ride share services such as UberX (18% in Other Urban, and 3% in Country compared to 27% in Urban Sydney) – consistent with the increase in reported use of ride share services in Other Urban locations from 4% in 2014 and 9% in 2015 to 18% in 2016, and the lack of change for Country locations (3% in each year).

Improved public transport is less likely to be selected in Other Urban (12%) or Country (3%) locations than in Urban Sydney (24%), as is worse driver behaviour (6% and 11% compared to 16%), and drivers taking longer routes or overcharging (6% in Other Urban, 11% in Country and 15% in Urban Sydney).

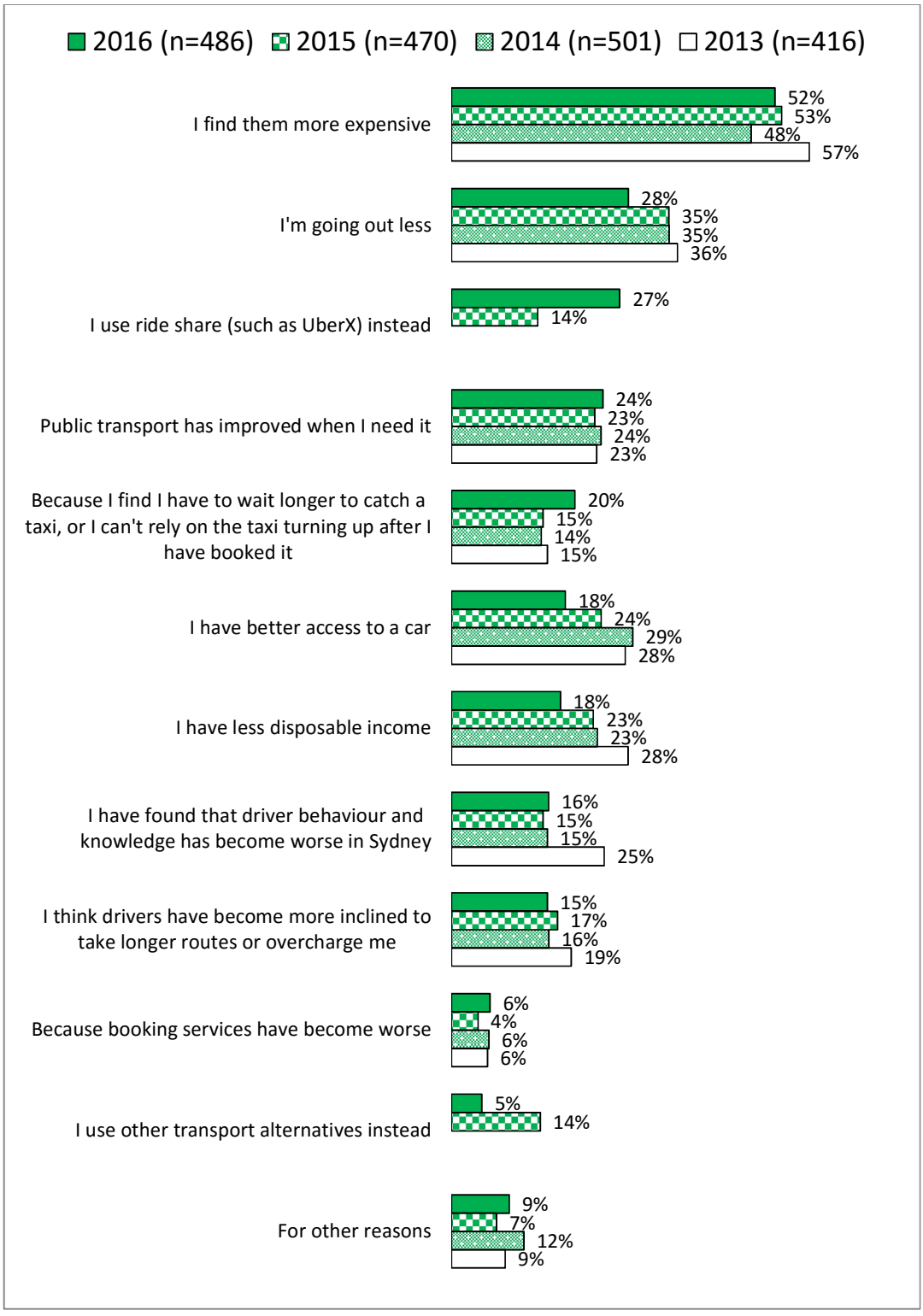
Given the sample sizes there is little room for these differences to be statistically significant.

Figure 17. Reasons for increased frequency of taxi use by survey year for Urban Sydney



Q2A. I caught taxis more frequently because (can choose more than one) …

Figure 18. Reasons for decreased frequency of taxi use by survey year for Urban Sydney



Q2B. I caught taxis less frequently because (can choose more than one) …

5.3. Future use

Respondents were also asked which one of a series of improvements would be most likely to persuade them to make increased use of taxis (see Figure 19.)

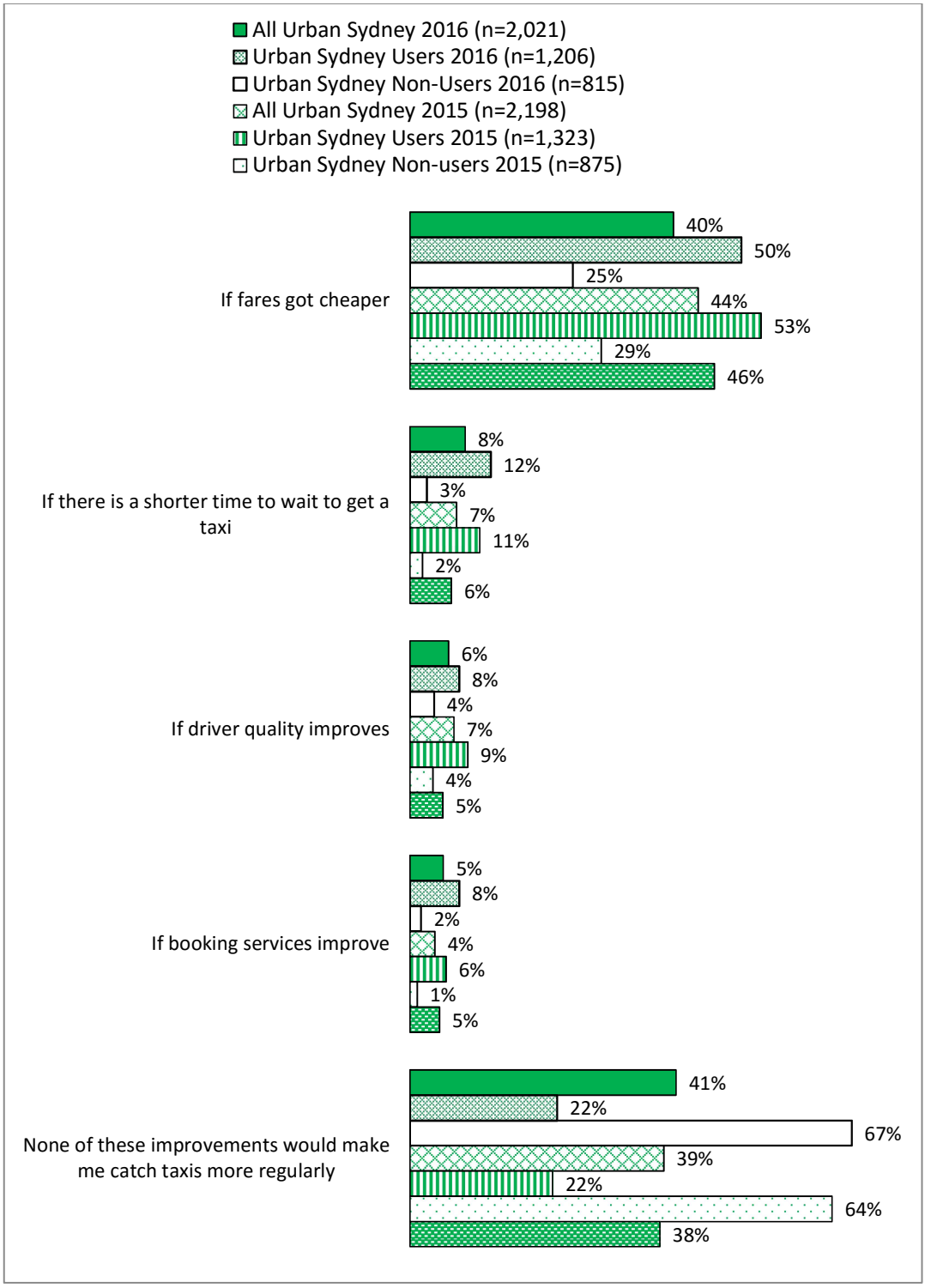
As in 2014 and 2015, in 2016 Urban Sydney users are more willing than non-users to say they would increase use in response to the prompted improvements. As in previous years, "cheaper fares" are still by far the most often endorsed for both users (50%) and non-users (25%). Reduced waiting times, improved driver quality and improved booking services are each the most persuasive for 8% to 12% of users and 2% to 4% of non-users. Non-users are much more likely (67%) than users (22%) to reply that none of these improvements would make them catch taxis more regularly.

While there are some shifts in the percentages endorsing each option the order of selections is unchanged from 2014 to 2016.

In Other Urban and Country locations, cheaper fares is also the dominant reason that would prompt increased use, especially among users (51% of n=211 Other Urban users and 40% of n=97 Country taxi users) with each of the other reasons being selected by under 10%.

It appears that price is the dominant conscious motivator of decisions about frequency of taxi use across all three regions sampled in 2016, as it was in 2015 and 2014, and in the Urban Sydney region in 2013.

Figure 19. Most likely to increase taxi use in the next year – Urban Sydney 2015 and 2016



Q3. In the next 12 months, the thing that is most likely to get me to catch taxis more regularly is: (pick only 1)

5.4. Use of taxis for work

Those who engage in paid work were asked whether their workplace covers the cost of using a taxi for work purposes, and whether they are allowed to use a taxi paid for by their workplace more, the same or less than in the previous twelve months.

Figure 20 shows the results for the five surveys with the 2016, 2015 and 2014 locations shown separately.

In Urban Sydney just over half the 2016 respondents doing paid work report that their workplace never pays for work-related use of taxis (51%). There is little change in the percentage reporting that their employer does often or sometimes pay (varying between 43% and 49% in from 2012 to 2016.

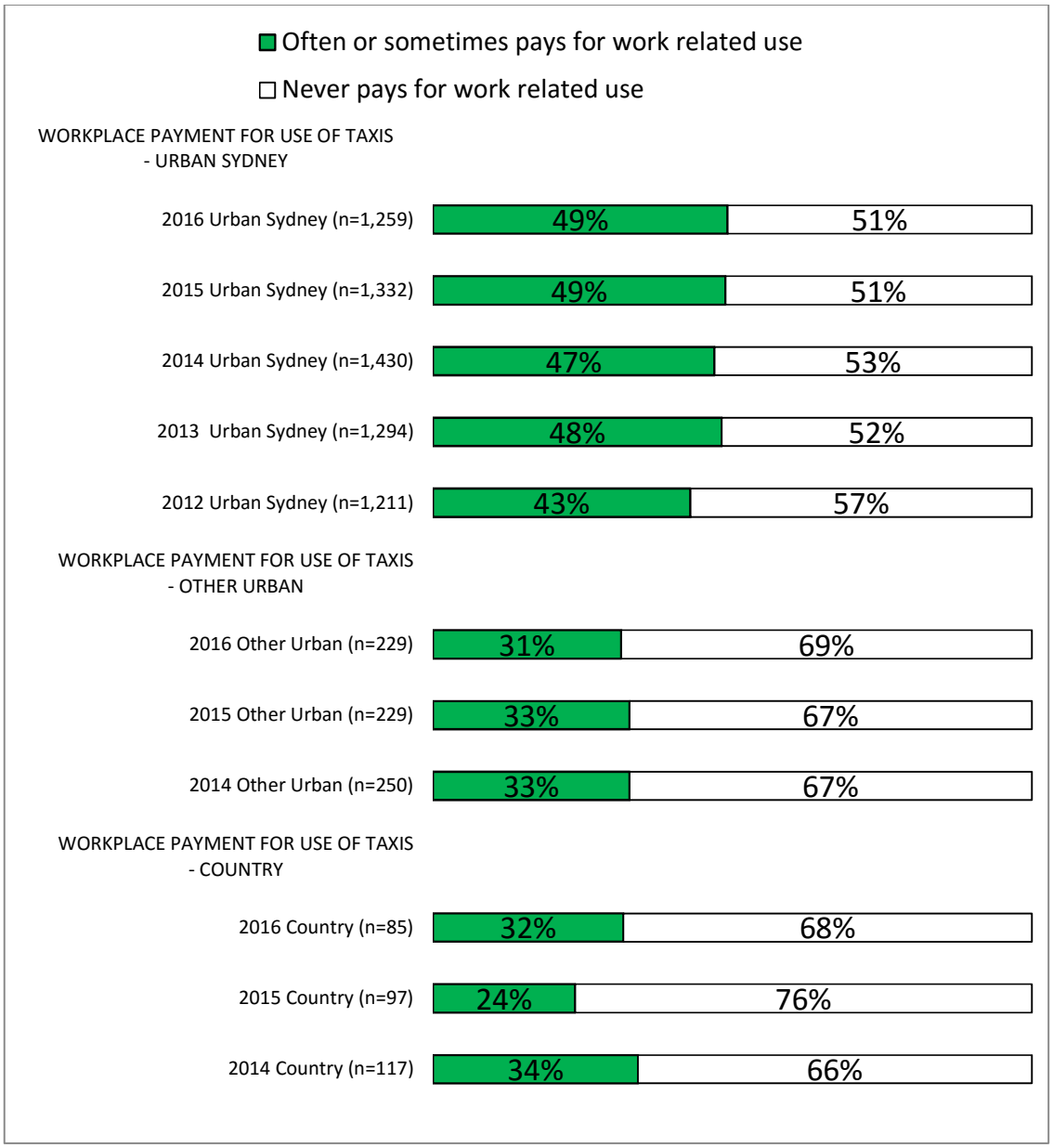
Employers never paying for staff to travel by taxi for work purposes is significantly more common in the Other Urban and Country locations than in Urban Sydney. Around two thirds of Other Urban and two thirds to three quarters of Country workers report their workplace never pays for work-related use of taxis.

The difference by location might be due to differences in whether staff ever need to use taxis for work-related trips.

There are no significant variations in whether employers' willingness to pay is seen to be increasing, decreasing or not changing - see Figure 21.

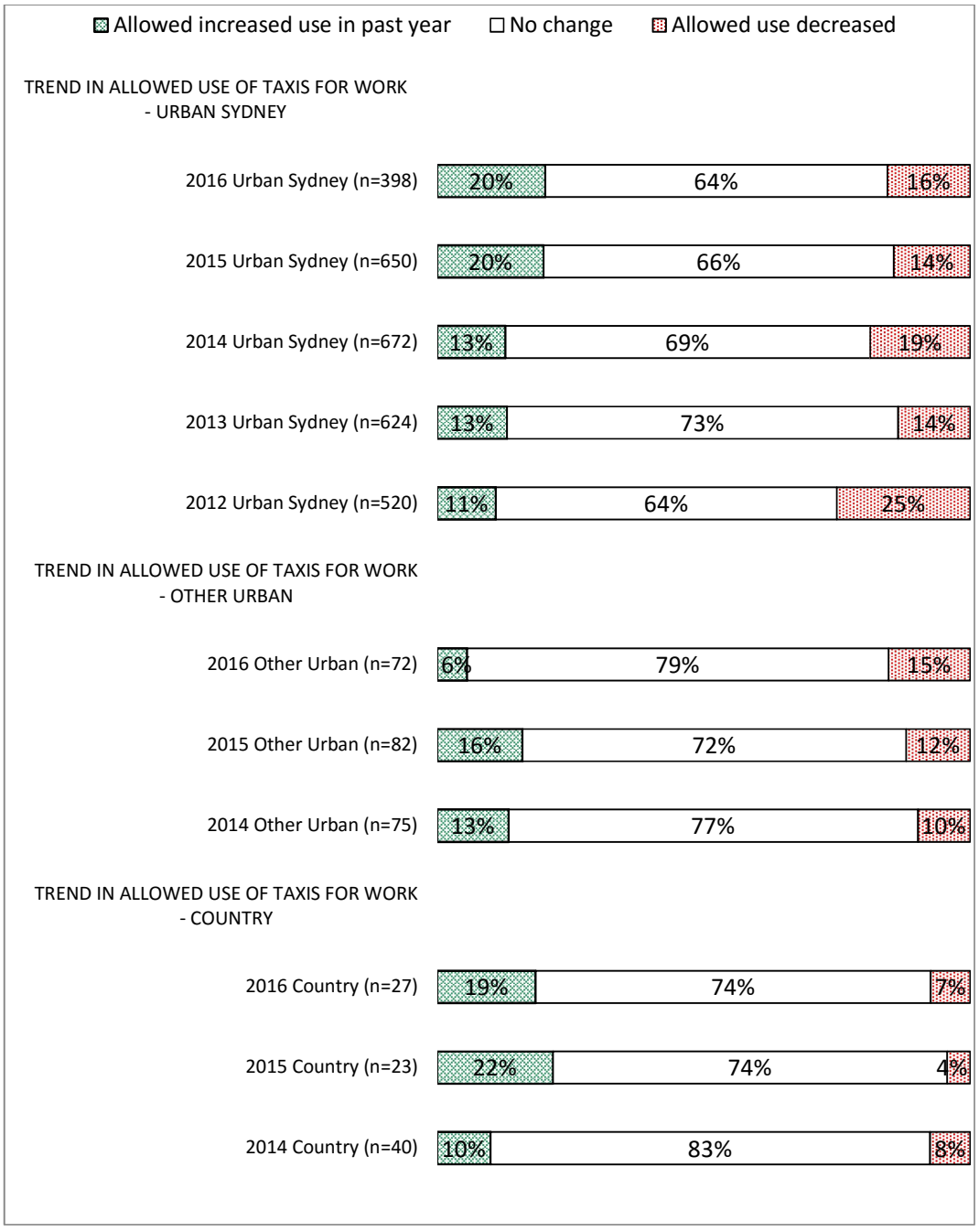
In all samples, most reported no change in being allowed to use a taxi for work purposes. While the balance between increased and decreased use varied, the only large difference is in Urban Sydney in 2012 (25% in 2012 report being less often allowed to use a taxi compared to 14% to 19% in the more recent years - see Figure 21). There is a consistent trend toward more employers allowing increased use of taxis in Urban Sydney, up from 11% in 2012 to 20% in 2015 and 2016. However, the trend is not statistically significant.

Figure 20 Workplace taxi use policies by location and survey year



Q2c My workplace …. Often or sometimes pays for staff to travel by taxi for work related purposes / Never pays for staff to travel by taxi for work related purposes
Base: Those in paid work

Figure 21 Trend in workplace taxi use policies by location and survey year



Q2d In the last 12 months…. My employer allowed staff to catch taxis more frequently compared to the previous 12 months / My employer allowed staff to catch taxis less frequently compared to the previous 12 months / There has been no change to work taxi travel policies that I know of
Base: Those where the employer at least sometimes pays for work-related use
NOTE: Treat with caution where n<50. Where n<20, result not shown.

5.5. Usual mode of transport

Those who usually get about by car are (as would be expected) significantly less likely to have used a taxi in the past six months (see Figure 22):

- 52% of n=1,269 in Urban Sydney who usually get about by car
- 72% of n=752 in Urban Sydney who do not usually get about by car

This effect is also significant in both Other Urban and Country locations:

- 37% of n=398 in Other Urban locations who usually get about by car
- 59% of n=106 in Other Urban locations who do not usually get about by car
- 33% of n=215 in Country locations who usually get about by car
- 62% of n=36 in Country locations who do not usually get about by car

Urban Sydney respondents who usually rely on public transport are a little more likely to have used a taxi (but not significantly so):

- 64% of n=972 in Urban Sydney who usually rely on public transport
- 56% of n=1,049 in Urban Sydney who do not usually rely on public transport

Other Urban respondents who usually rely on public transport appear more likely to have used a taxi (60% of n=122) than those who do not (36% of n=382), but the difference is not statistically significant.

In Country locations, the few who usually rely on public transport (n=22) also appeared more likely to have used a taxi (77% compared to 36% of n=229 who do not rely on public transport, a statistically significant difference).

To summarise results for urban Sydney:

Taxis are more likely to be used, and to be used more often by those who:

- Usually use Car Share services such as GoGet (95% have used a taxi in the past six months, and 59% have done so at least once a week)
- Usually use Ride Share services (94% of n=105 use taxis, and 37% do so once a week – well above the rest of the sample)
- Usually use Community Transport services (71% of n=56 have used a taxi and 44% at least once a month)
- Usually use Courtesy Transport services (65% have used a taxi and 55% at least once a month)

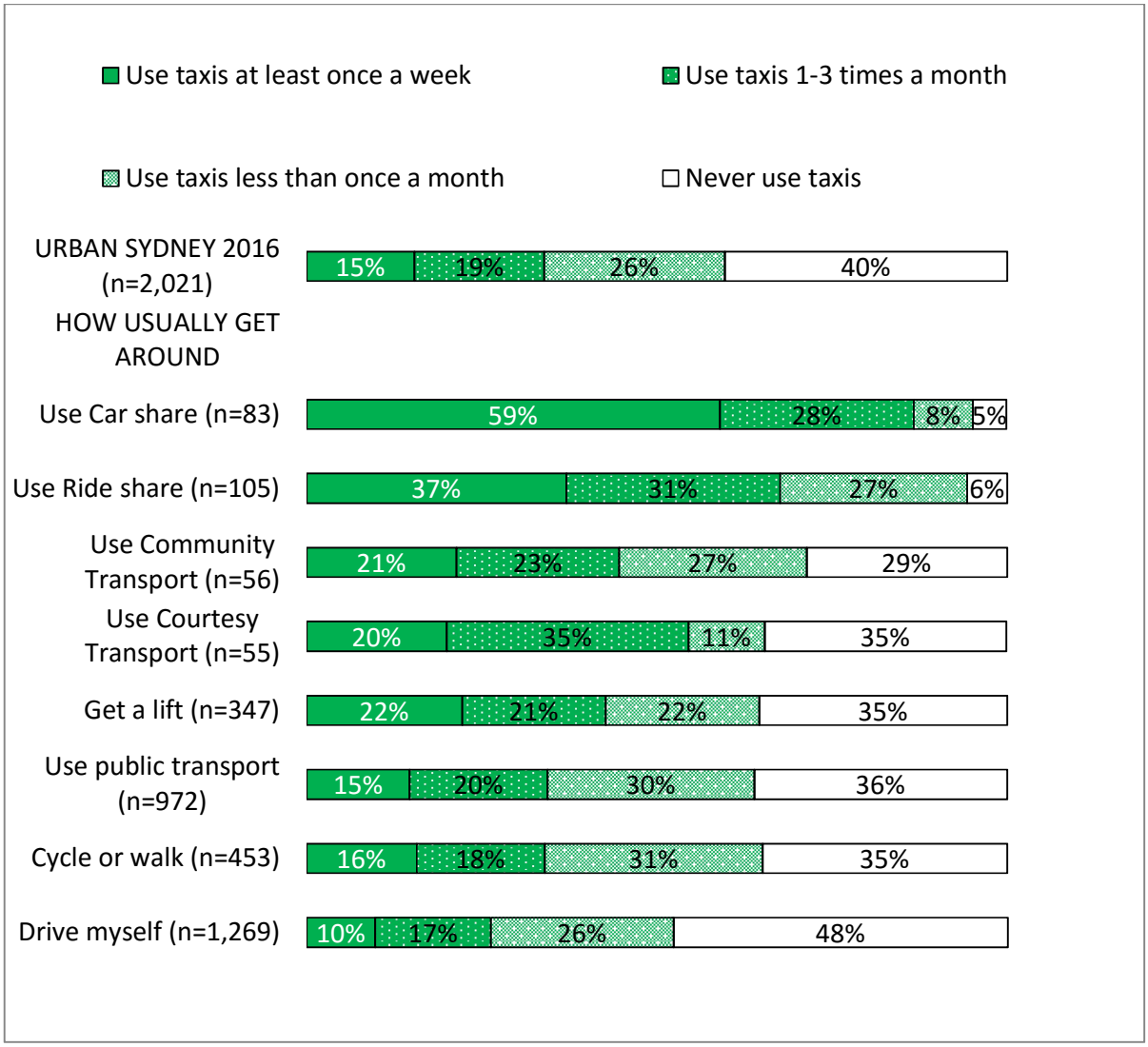
There was a small effect on use of taxis and on frequency of taxi use from usually getting a lift (65% of n=347 have used a taxi and 43% at least once a month).

There was almost no effect from usually using public transport (64% of n=972 have used, 35% at least once a month), and almost no effect from usually cycling or walking (65% of n=453 have used, 34% at least once a month).

As noted above, those who usually drive themselves are the least likely to report having used a taxi in the past six months (52% of n=1,269) and to have done so at least once a month (37%).

The Urban Sydney results for each segment by mode of transport usually used are shown in Figure 22.

Figure 22. Frequency of taxi use in the past six months: 2016 Urban Sydney by other services regularly used



Q1. In the last six months I caught a taxi in Sydney…. BY Q45C How usually get around

5.6. Whether waiting times reasonable

In 2016, 2015, 2014 and 2013 all taxi users were asked whether they considered the time taken to get a taxi at different combinations of time of day and day of week was reasonable.

Figure 23 shows the distribution of replies in 2016.

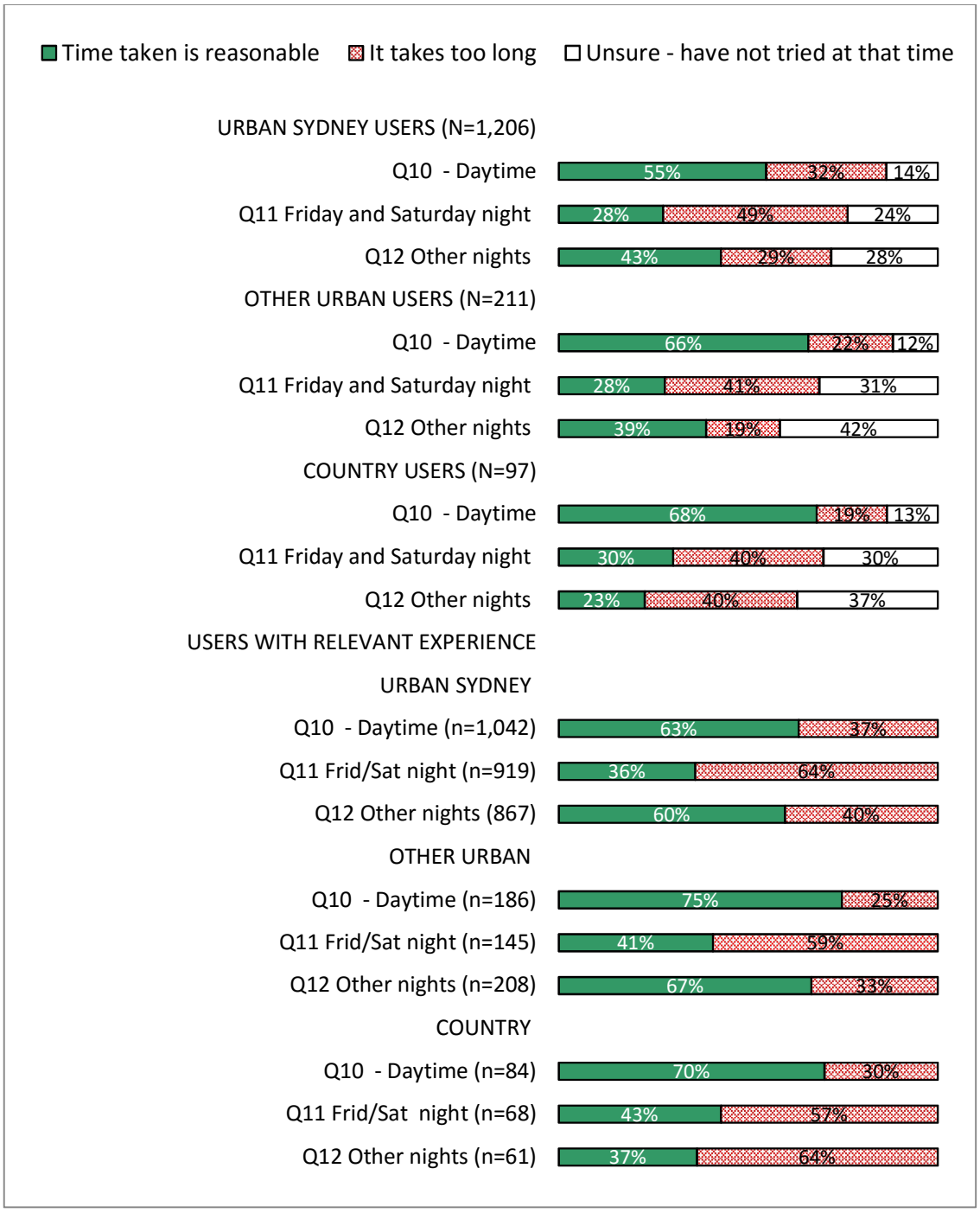
Among those with relevant experience, in Urban Sydney, waiting times on Friday and Saturday nights are more likely to be considered too long than reasonable (64% to 36%) while at other times the balance is reversed (37% too long to 63% reasonable for daytime journeys, and 40% too long to 60% reasonable for Urban Sydney journeys on other nights). Other Urban users with relevant experience show a similar pattern. Country users are more likely to consider waiting times too long for journeys taken on Friday and Saturday nights (57% too long compared to 43% reasonable) and on other nights (64% too long compared to 37% reasonable), the reverse of the pattern in Country locations for daytime (30% too long, 70% reasonable).

This confirms the pattern evident for Urban Sydney in all previous surveys.

For Other Urban, in 2015, more taxi users with relevant experience considered the waiting time on Friday and Saturday Nights to be reasonable (72%) than too long (28%), the reverse of the 2016 pattern for these nights. The 2016 results also reverse the pattern for other weeknights previously found for Country locations.

In 2016 there is clear evidence that perceived unacceptable delays in obtaining a taxi are much more common on Friday and Saturday nights in all locations, and on other nights in Country locations.

Figure 23. Whether taxi waiting times considered reasonable, 2016



Q10. During the day, I think that: ….

Q11. On Friday and Saturday nights, I think that:

Q12 On Sunday to Thursday nights, I think that:

The time taken to get a taxi is reasonable / It takes too long to get a taxi / I'm not sure because I haven't tried to catch a taxi [AT THAT TIME]

5.7. Being unable to get a taxi

All taxi users were asked whether they had been able to get a taxi the last time they tried, and (if not) were asked which of three reasons applied. The distribution of replies to this question is shown in Figure 24.

This allows estimates to be made of the prevalence of being unable to get a taxi when one was wanted. However, the analysis is complicated by the fact that for those who reported they had always taken a taxi when they had thought of taking one, and those who said they had not thought of taking a taxi in the past six months, the only data captured on the origin, destination, time of day and day of week is for the most recent trip they **had taken**. They could not be asked what they had intended to do for a trip they had not considered taking

Figure 24 shows the prevalence of being able to get a taxi the last time a taxi user had **wanted** a taxi, and the reasons for being unable to get one among the n=1,016 in Urban Sydney, n=195 in Other Urban and n=92 in Country locations who were asked. Further breakdowns by origin, day of week and time of day are also shown for Urban Sydney.

The majority of Urban Sydney taxi users were able to get a taxi the last time they tried (70% in 2016, 73% in 2015, 76% in 2014), as are a similar proportion of Other Urban (78% in 2016; this was 88% in 2015) and Country (79% in 2016; this was 86% in 2015). The lower values in 2016 might be due to the addition of a code allowing respondents to say that it was too long ago, and they cannot recall. This option was not offered in the previous surveys.

The reasons given for being unable to get a taxi are: a taxi not turning up as booked (9% in Urban Sydney, 9% in Other Urban and 2% in Country locations), being unable to find a taxi when trying to hail one from the street (7% in Urban Sydney, 1% in Other Urban and 5% in Country locations), and not being able to find one at a taxi rank (7% in Urban Sydney, 6% in Other Urban and 3% in Country locations).

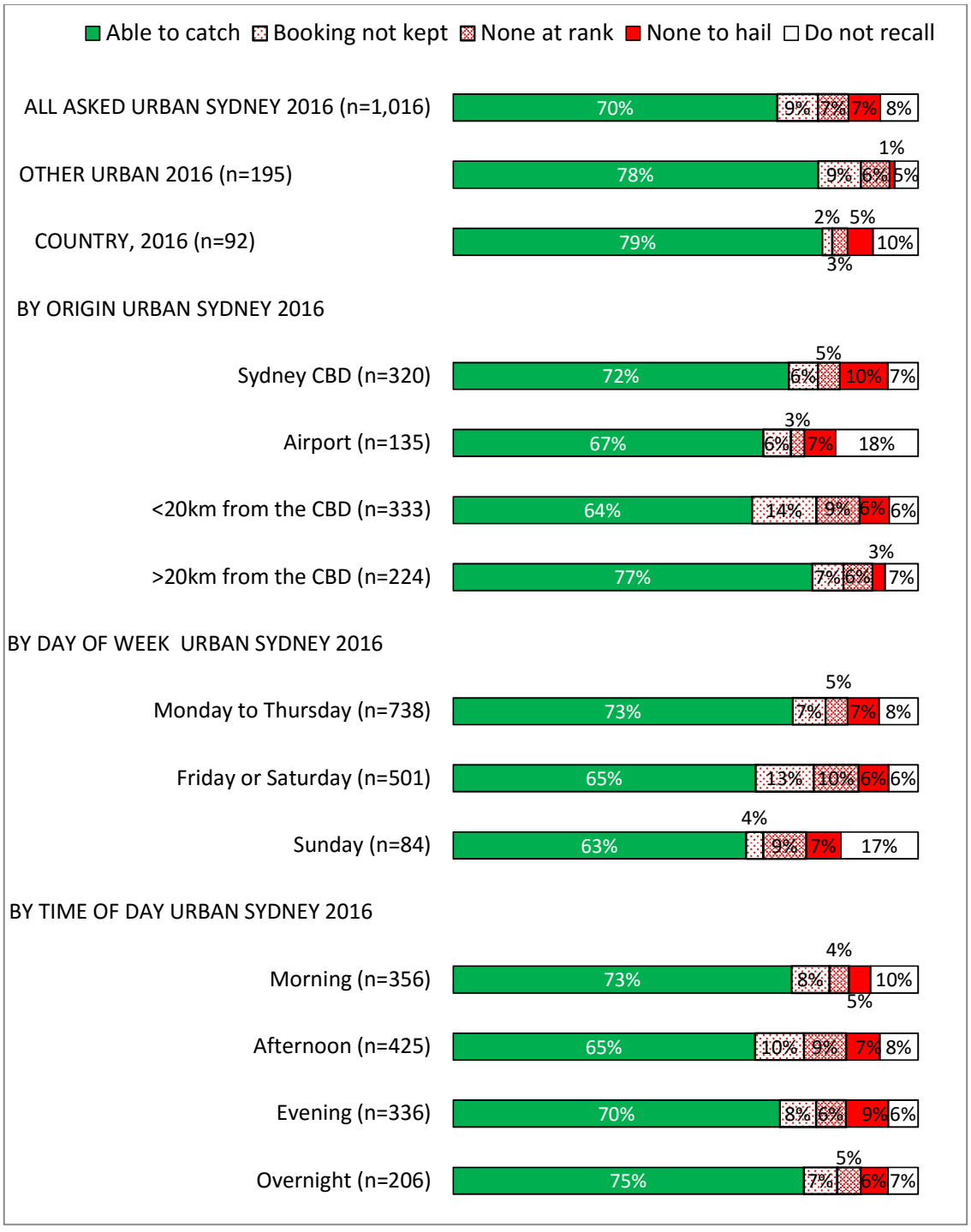
The only statistically significant difference by the origin of the trip in Urban Sydney is the lower chance of catching a taxi when wanted for those living within 20 km of the Sydney CBD (64%) than for those living >20kms from the Sydney CBD (77%). This is a relatively small difference.

The highly significant difference for Urban Sydney taxi users by time of day found in 2015 is not repeated in 2016, and was not found in 2014.

In 2016 Monday to Thursday performance is significantly better (73%) than Friday to Saturday (65%) or Sunday (63%). A similar effect was found in 2015, and even larger differences by day of week were found in 2014.

The overall results are reasonably close to those obtained in 2015, 2014 and 2013 indicating no change in overall taxi availability.

Figure 24. Being able to get a taxi when wanted one and reason for inability if unable by origin, day and time, 2016



Q13. When I last tried to catch a taxi I was
Able to get a taxi / Not able to get a taxi because: One didn't turn up after I had booked it/ One didn't come to my rank / one didn't drive past when I was trying to hail one/so long ago that I last tried to catch a taxi I don't remember

5.8. Reasons unable to take a taxi when tried

The respondents who reported in 2016, 2015, 2014, and 2013 that at least once in the past six months they had tried to take a taxi and could not get one were asked the reason they could not get a taxi.[2]

Figure 25 shows the percentages giving each of the prompted replies for Urban Sydney and Other Urban in 2016 (n=248 and 24) in 2015 (n=279 and 47) and 2014 (n=254 and n=39), and in Urban Sydney in 2013 (n=209).

In 2016, 2015, 2014 and 2013, six percent of those asked reported that they had tried to take a taxi and the driver refused to take them when told the destination. These respondents form less than 1% of those who have taken a taxi in the past six months. The prevalence of this particular problem is low (6%).

For Urban Sydney in 2016, three reasons dominate the replies - not turning up when booked (29%), not being able to find a taxi at a rank (28%) and not seeing a taxi that could be hailed (27%). There are no consistent trends in the percentage giving each of these reasons over time.

In the Other Urban locations, there were much larger fluctuations from year to year in the balance between the different reasons. However, given the extremely small sample size in 2016 (n=23) it is difficult to draw any conclusions.

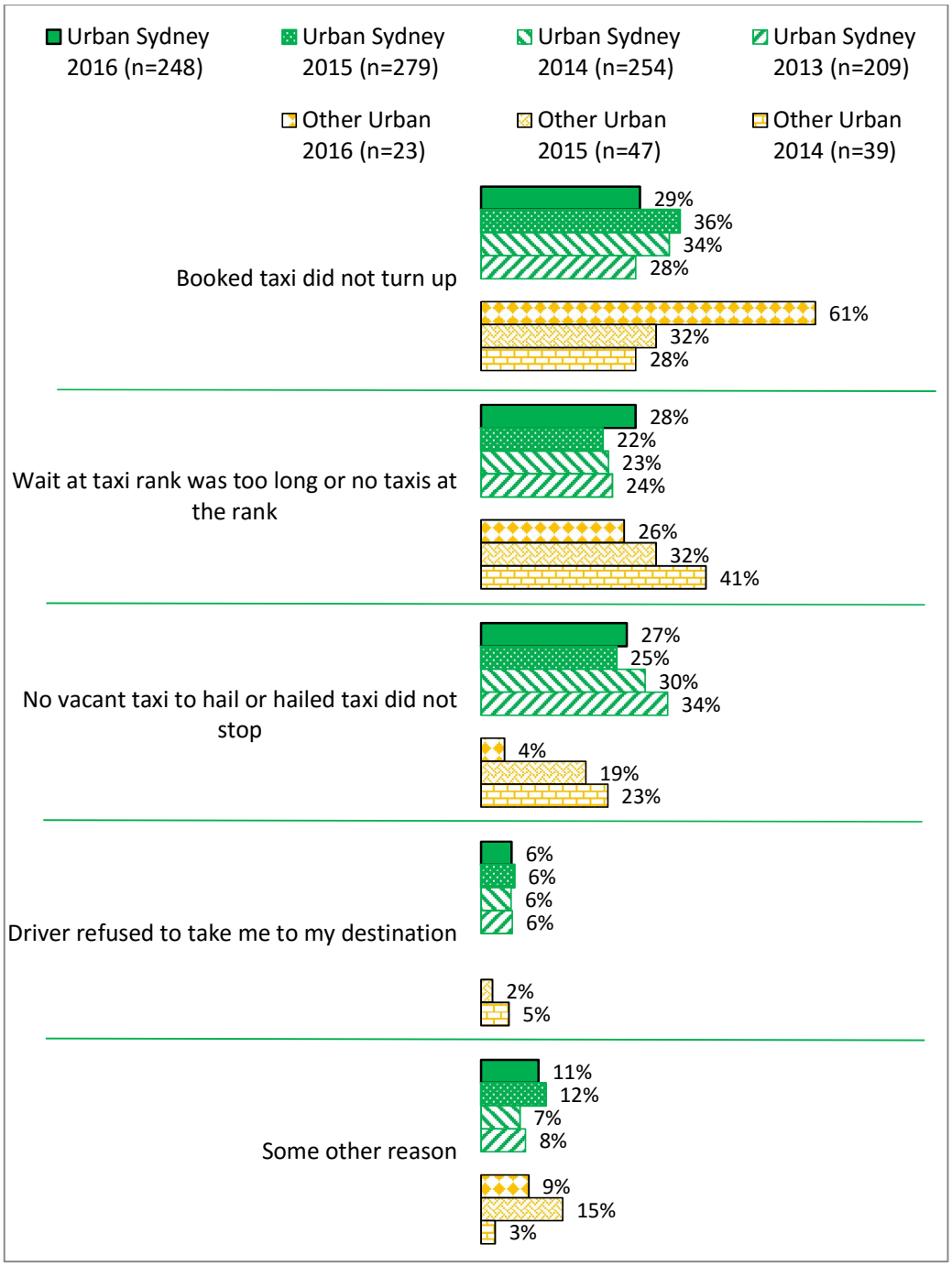
The percentage who report at least once in the past six months being unable to take a taxi when they had tried to do so increased slightly from 18% of taxi users in 2013 to 19% in 2014, 21% in 2015 and 21% of Urban Sydney taxi users in 2016. It is also reported by 11% of n=211 Other Urban taxi users in 2016, well below the 19% of n=242 Other Urban users in 2015 and 20% of n=199 in 2014, and by 6% of n=97 Country taxi users (little

[2] Note that this question is different and singles out a different sub-group of respondents to those who said in reply to Q13 that they had been unable to get a taxi the last time they tried to do so. The sub-group asked Q33a includes everyone who said at Q31 that they had at least once in the past six months tried to take a taxi and could not get one. Those included in the sample answering Q13 will also have been asked Q33a, along with others who could not get a taxi when they tried to do so on occasions before the last time they tried to take a taxi.

changed from 6% of n=202 in Country location in 2015, and 8% of n=106 in 2014).

The 2016 result for Urban Sydney (21% of all Urban Sydney taxi users) is very close to the 22% of Urban Sydney taxi users who were asked about their last taxi trip and said that they were unable to get a taxi. Note that 8% were unable to recall whether they had been able to get a taxi (70% had) or not (22% definitely were not). Of those able to recall whether they had obtained a taxi on the last occasion they tried to get one, 24% had been unable to get one – quite close to the 21% who recalled that at some time in the last six months they had tried to get a taxi and been unable to do so.

Figure 25. Reasons did not take a taxi when tried to do so by location and survey year



Q33a The last time I did not catch a taxi although I tried to, I did something else because …
[TRIED AND WAS UNABLE TO GET A TAXI AT Q31]
Result not shown if percentage = zero.

5.9. Reasons did not take a taxi

Those who reported they had thought about taking a taxi and decided to do something else were asked which of the reasons shown in Figure 26 decided them to not do so.

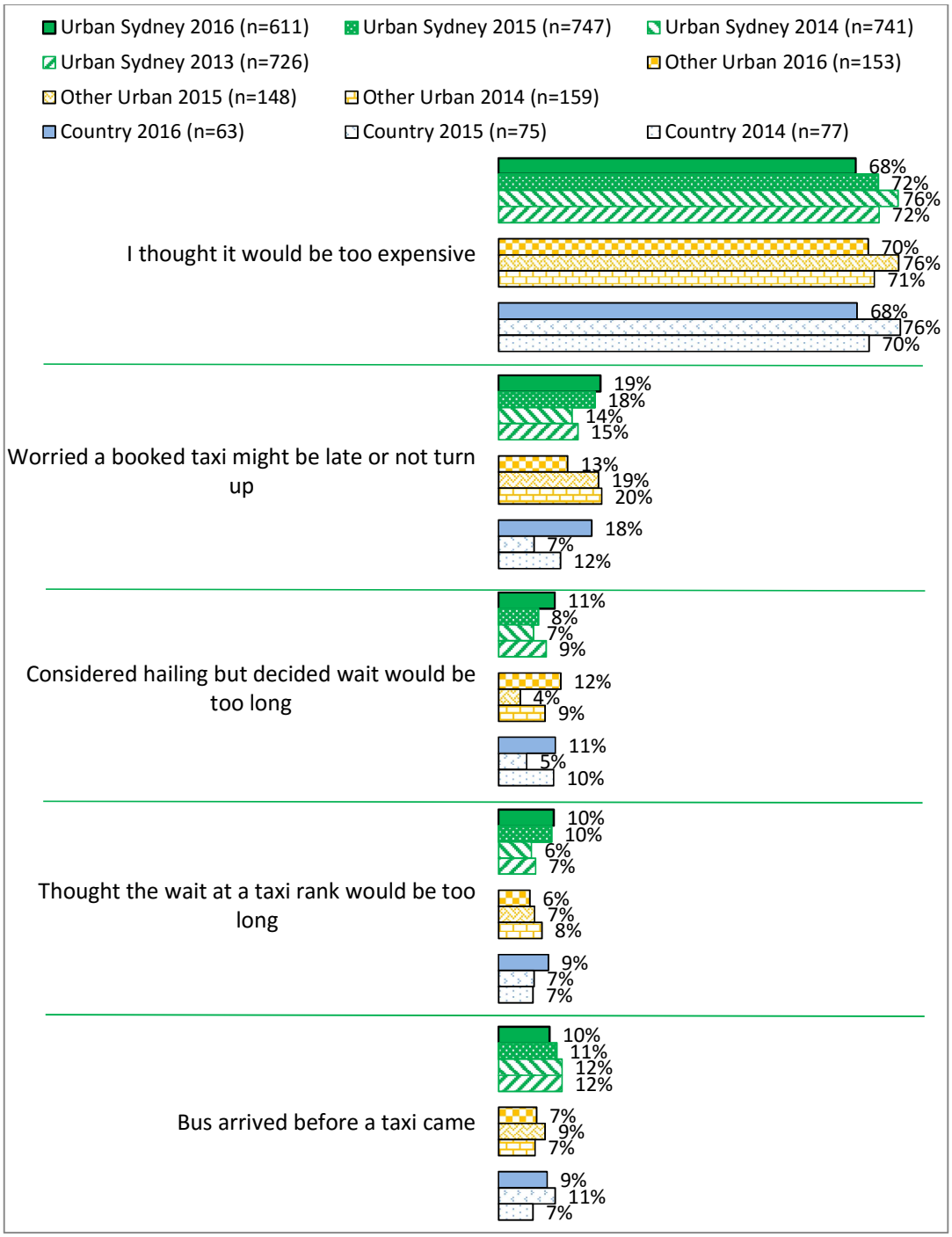
In every year, and all locations, being too expensive is the most likely reason being chosen three or more times as often as any of the reasons connected to waiting time or a booked taxi not turning up or being late.

Replies given in 2012 are not shown due to changes in the options offered.

There are no significant or substantial changes in the results from 2013 to 2016.

These results add further evidence that cost continues to be the main conscious barrier to increased taxi use.

Figure 26. Reasons decided to not take a taxi by location and survey year



Q33b The last time I did not take a taxi although I thought about it, I decided not to because … (NOTE: the response options offered in 2013 and 2014 were different to 2012)

Base: "Thought about taking a taxi but then decided to do something different" at Q31

5.10. Action taken instead of taking a taxi

A substantial segment in each 2016, 2015 and 2014 location and in 2013 recalled having considered taking a taxi in the past six months and deciding in the end to do something different or being unable to get one.

Figure 27 shows that in all locations, most (over 90%) still took the intended trip. This was also true in all locations in each previous survey year.

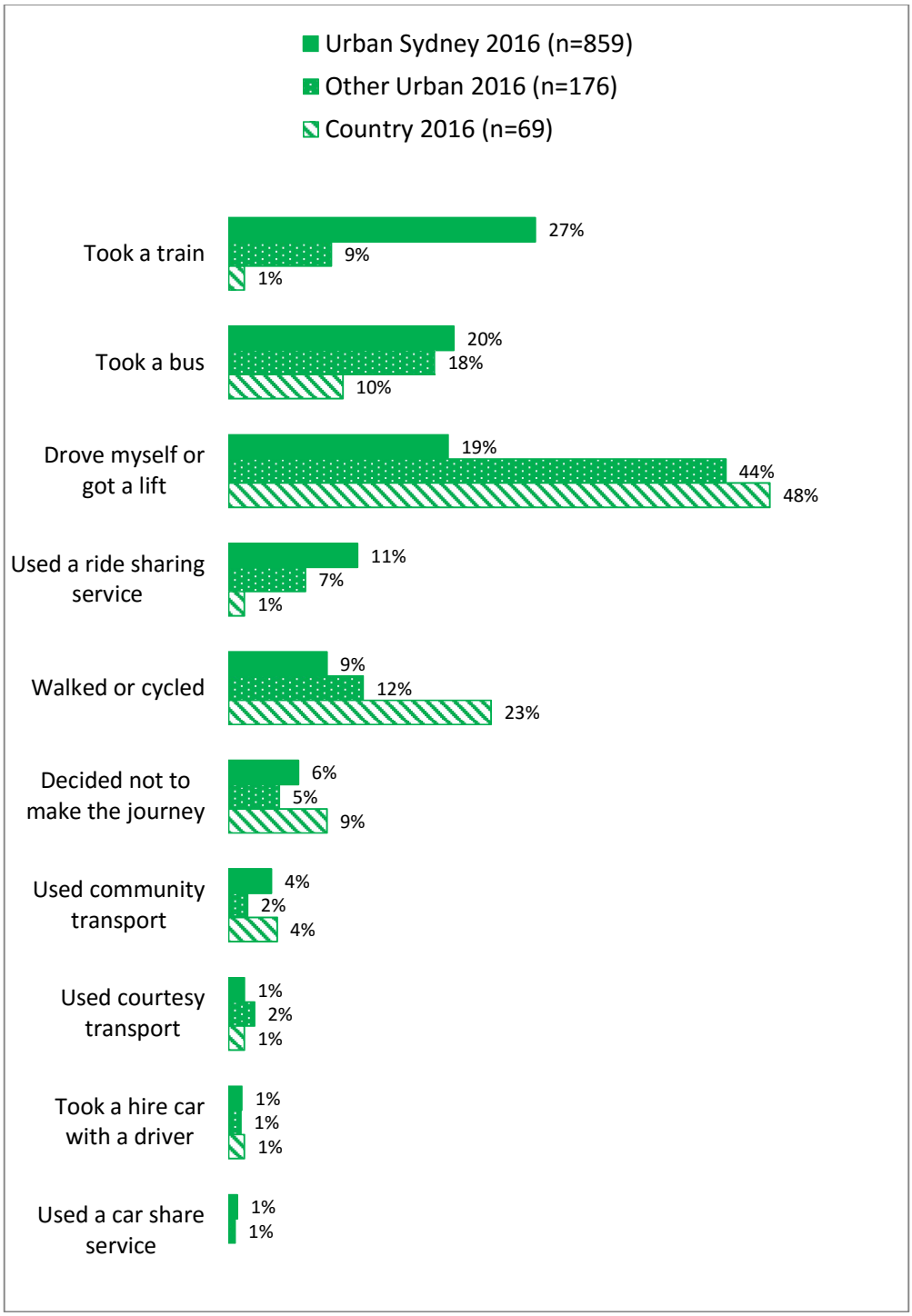
In Urban Sydney, the alternative adopted is typically a train or bus, or to drive. Comparisons with the results from previous years can be misleading because the item allowed only a single response in 2016, and had allowed multiple responses in previous years (to allow for substituting more than one mode in journey stages).

Despite this "forced" reduction, using a ride share service increased from 2% in 2014 (not available in 2013) to 6% in 2015 and 11% in 2016. As this mode is unlikely to be combined with other modes, this probably reflects the real increase in use of ride share services in Sydney. Use of community transport, courtesy transport, hire car services, and car share services were all under 5% in all locations in 2016. As these are also unlikely to be combined with other transport modes, these results can be accepted as valid.

Figure 27 shows the marked differences in 2016 between the three regions. In Other Urban and Country locations, driving or getting a lift dominates, followed by taking a bus or walking or cycling. Few take a train, especially in the Country towns, reflecting differences in availability of different transport modes. Use of hire cars, ride sharing or car sharing services all remain quite rare substitutes for taking a taxi, although 7% report using ride share in the Other Urban areas.

As the journey described must be a different occasion from the last taxi trip taken, analysis by the characteristics of that last taxi trip might be misleading. However, if the journey to be taken is similar to the last taxi trip, there might be some relationship. There was a tendency (as found in 2015) for those taking longer journeys on their last taxi trip to switch to taking a train when they did not take a taxi, and for those who had shorter journeys on their last taxi trip to walk or cycle, or to take a bus when they did not take a taxi.

Figure 27. Action taken instead of taking a taxi by location - 2016



Q32 The last time I tried to catch a taxi or thought about catching a taxi and in the end did not, I …

Base: Those who said "I thought about taking a taxi but then decided to do something different" PLUS n=209 who had been "unable to get one" in Q31

5.11. Problems experienced with taxi use

In 2016, 37% of Urban Sydney taxi users (very close to the 36% found in 2015 and 35% in 2014) report having had one or more problems either during a taxi journey or when trying to catch one in the last 12 months. Only 26% of 2016 Other Urban users (25% in 2015, 27% in 2014) and 27% of 2016 Country taxi users (24% in 2015, 25% in 2014) report one or more problems. Figure 28 shows the range of problems endorsed from the prompted list plus those volunteered when a respondent who replied "something else" was asked to describe the problem. Those giving a verbatim answer that fits one of the prompted problems are recoded against that problem and treated as not having another problem.

All of the additional problems reported by Urban Sydney respondents are reported by less than 1% of the taxi users who report a problem. One issue (the taxi not arriving despite a booking being made) exceeds 1% for Other Urban and for country locations, but in each case this was only one user.

For all Urban Sydney in 2016 (as in 2015) the most common problem is being unable to get a taxi when one was wanted (48%). This is even higher in Other Urban (57% of those with a problem) and just above Country (42%) locations. Not taking the most direct route comes next - almost as prevalent in Urban Sydney (43%) as being unable to get a taxi, and is similar in Other Urban (37%) and Country (42%) locations. Note that each problem is reported by no more than 15% of those who have used a taxi in the past six months, and by less than 10% in Urban Sydney and Country locations.

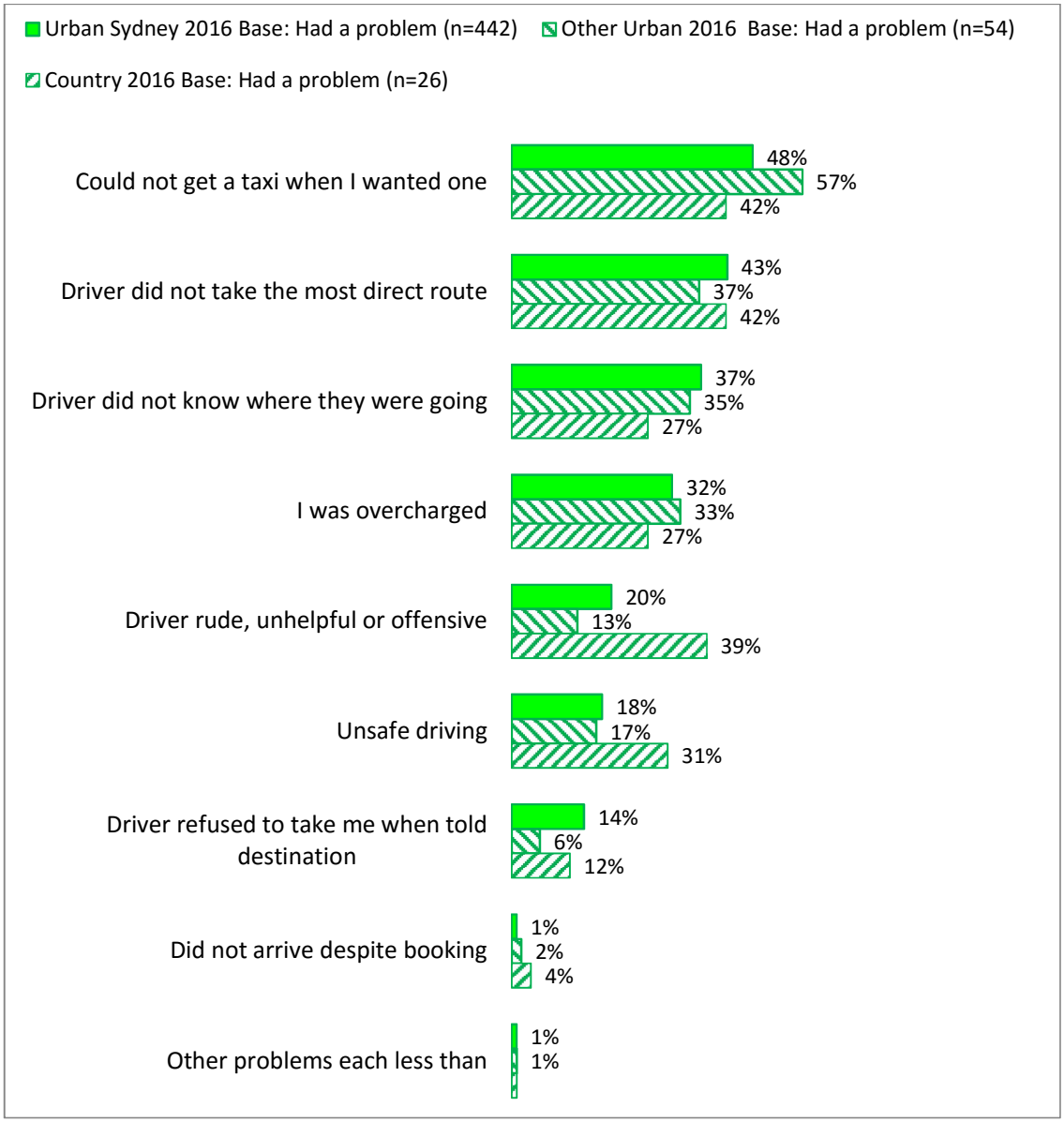
About 10% of taxi uses had a problem other than those listed in the question. However, additional problems with driver behaviour (some extremely serious) and a few with booking systems or the actual vehicle are each volunteered by under 1% of those with a problem and by less than half of one percent of all taxi users. Some of the volunteered replies might be endorsed by larger numbers if they had been included in the prompted list.

Some reported more than one problem, and might have been commenting on problems with different journeys.

Most (80% or more) of the users with a problem are able to categorise it using the list of problems provided

The distribution of problem types for those with a problem in Urban Sydney in 2016 is very close to the distribution found in Sydney in 2015 and 2014. The rank order of the percentage endorsing each problem is almost the same in all three years. The 37% of Urban Sydney taxi users in 2016 who reported having a problem is almost identical to the 36% making such reports in 2015, and 35% in 2015. It appears that the prevalence and nature of problems is quite stable.

Figure 28. Problems experienced with taxi use by location - 2016



Q40a Problems I have experienced in the last 12 months include: (can choose more than one) with verbatim "other" replies coded.

6. Results: Most recent taxi trip

6.1. How was the taxi obtained

On their last taxi trip, the bulk of taxi users employed one of the traditional methods – hailing the taxi in the street, catching a taxi at a taxi rank, or phoning a taxi company (see Figure 29 and Figure 30). This is true in Urban Sydney in all five surveys to date, and also in the 2016, 2015 and 2014 Other Urban and Country locations.

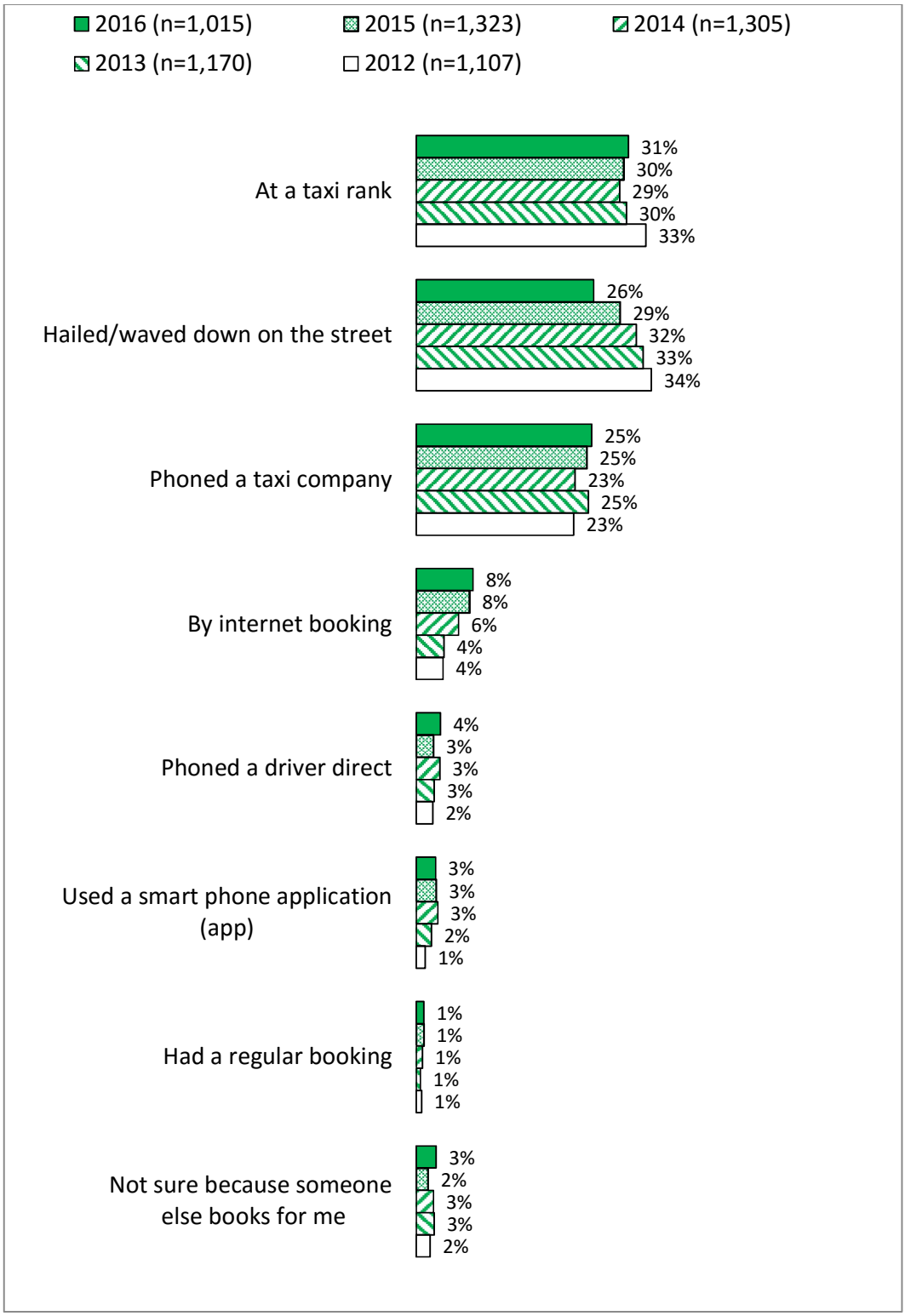
These accounted for 82% of the Urban Sydney occasions captured in 2016, (84% in 2015, 84% in 2014 and 88% in 2013), 84% in Other Urban locations in 2016 (87% in2015, 91% in 2014) and 93% in Country locations in 2016 and 2015, 92% in 2014.

Alternative methods enabled by mobile or internet technology account for 11% or the most recent trips in Urban Sydney in 2016, (11% in 2015 and 9% in 2014); 7% in Other Urban locations in 2016, (5% in 2015 and 3% in 2014; and 1% in Country locations in 2016, (0% in 2015 and 2% in 2014). Thus, use of these alternatives is growing slowly in Urban Sydney and Other Urban locations but they are used on any one occasion by only a small minority of taxi users, never exceeding 15%.

Only 4% in Urban Sydney in 2016 (3% in 2015 and 2014, and 2% in 2013) had used a smart phone app, similar to the percentage who had phoned a driver direct and under half the percentage who had booked over the internet (8%).

There is little change from 2012 to 2014 in Urban Sydney methods. The small percentage that report booking through the internet increased from 4% in 2012 to 8% in 2015 and 2016.

Figure 29. How was the taxi obtained – Urban Sydney by survey year



Q22. I got the taxi …

However, there are marked differences in the method used to obtain a taxi between Urban Sydney, Other Urban and Country locations in 2016 (see Figure 30), as there were in 2015 and 2014.

The three traditional methods (i.e., hailing the taxi in the street, catching a taxi at a taxi rank, or phoning a taxi company) are about equally often used in Urban Sydney, (all 25-31% in 2016, 25-30% in 2015, 23-32% in 2014).

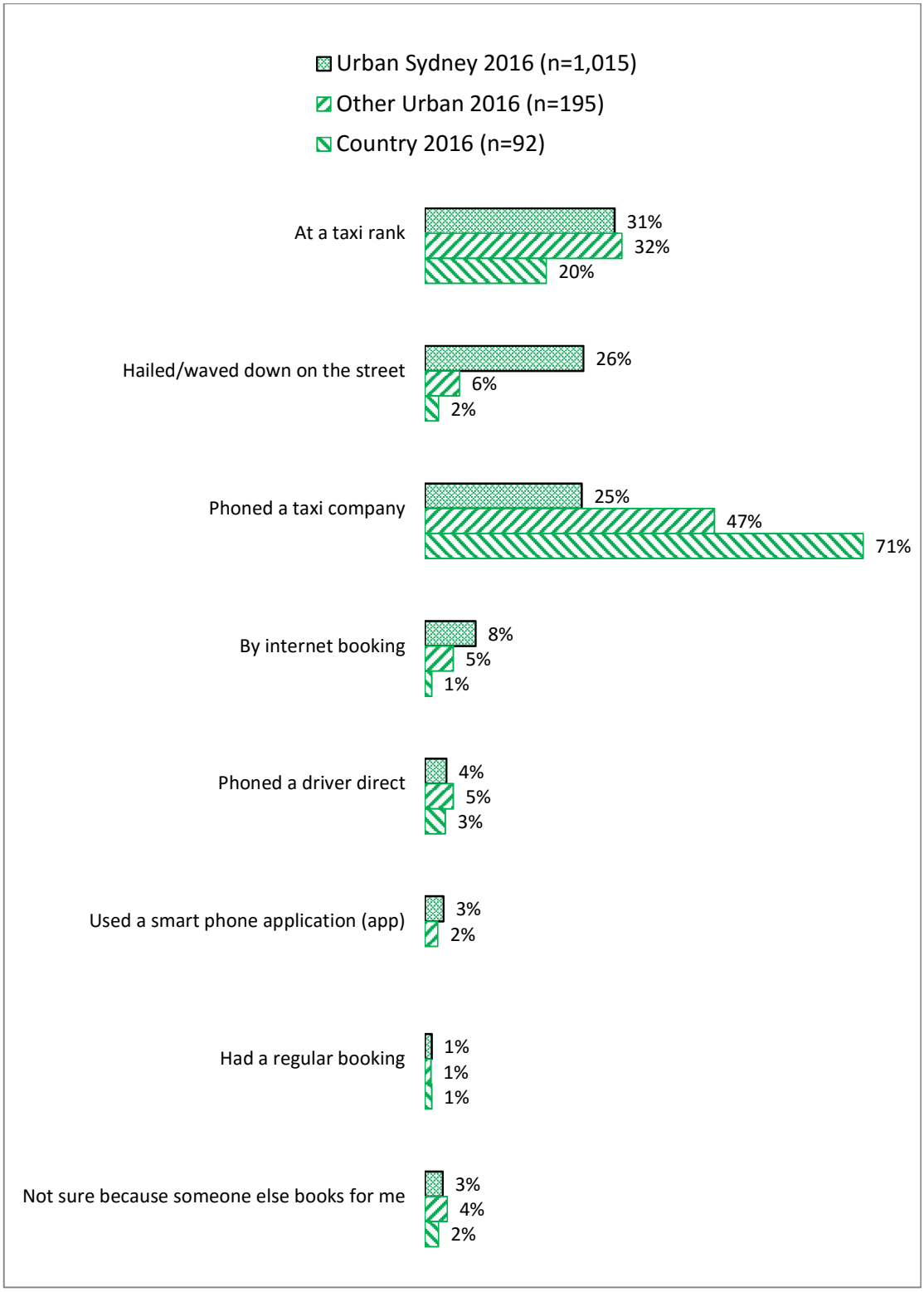
Between 2014 and 2016, hailing a passing taxi is much less common in the Other Urban areas (6% to 11%) and very rarely reported in Country locations (0-3%). Phoning for the taxi is much more common in the Other Urban locations (44% to 47%) than in Urban Sydney and is the dominant method in Country locations (67% to 71%). The proportion catching their last taxi at a taxi rank is quite similar in in urban Sydney and Other Urban locations – 29-31% in Urban Sydney, 32-33% in Other Urban. However, it is only 20% in the Country locations in 2016, down from 27-29% in 2014 and 2015 respectively.

These differences by location in how taxis were obtained probably reflect the different availability of taxis and the different locations where they are taken as described later.

Among those who used taxis, 2% (n=32) of respondents reported that they used an app in 2016 (n=28 in Urban Sydney, and n=4 in Other Urban, none in Country), 3% (n=44) reported that they used an app in 2015 (n=39 in Urban Sydney and n=5 in Other Urban) and 3% (n=42) reported that they used an app in 2014 (n=40 in Urban Sydney and n=1 each in the other two regions). Out of those who reported that they used apps, the most the most commonly used app was UberTAXI (34% in 2016; 25% in 2015; not coded in 2014), Mtaxi (21% to 24%), and Silver Service (10% to 17%). Legion Taxis fell sharply from 36% in 2014 to 7% in 2015 and zero in 2016. GoCatch is reported by a few (9% to 11%). Apple Taxi (1/32), iCab (1/32), and others not listed (4/32) account for the remaining app users in 2016. Note the 2016 base is reduced by the split in the sample between those asked about their last taxi trip and those asked about their last ride share trip among people who reported doing both.

Given the small sample bases, no firm conclusions about shifts in market share can be drawn. One trend does appear substantial and is likely to be a real shift in market presence – UberTAXI, which was not listed in 2014 is the most often reported in 2015 and even higher in 2016.

Figure 30. How was the taxi obtained by location, 2016



Q22. I got the taxi …

6.2. Waiting time

Respondents who had taken a taxi in the past six months were asked how long it took to obtain the taxi they used (see Figure 31).

In each survey from 2012 to 2016, waiting less than five minutes is much more likely if boarding at a rank (52% to 58%) or hailing a passing taxi (41% to 46%) than if booking the next available taxi (7% to 12%).

Similarly, waiting less than ten minutes is also much more common for those who waited at a taxi rank (81-87%) or hailed the taxi (75% to 83%) than for those booking the next available taxi (46% to 55% except in 2013, when it dipped to 35%).

While the advantage for boarding at a rank might not take into account the time taken to reach the rank, booking the next taxi available is clearly more likely to involve waiting times of ten minutes or more than the other methods.

Correspondingly, waiting for 20 minutes or more is much more common for those who booked the next available taxi (9% to 18%) than for those hailing a taxi (1% to 5%) of boarding at a rank (1% to 5%).

The stability of these results is notable.

Effect of location

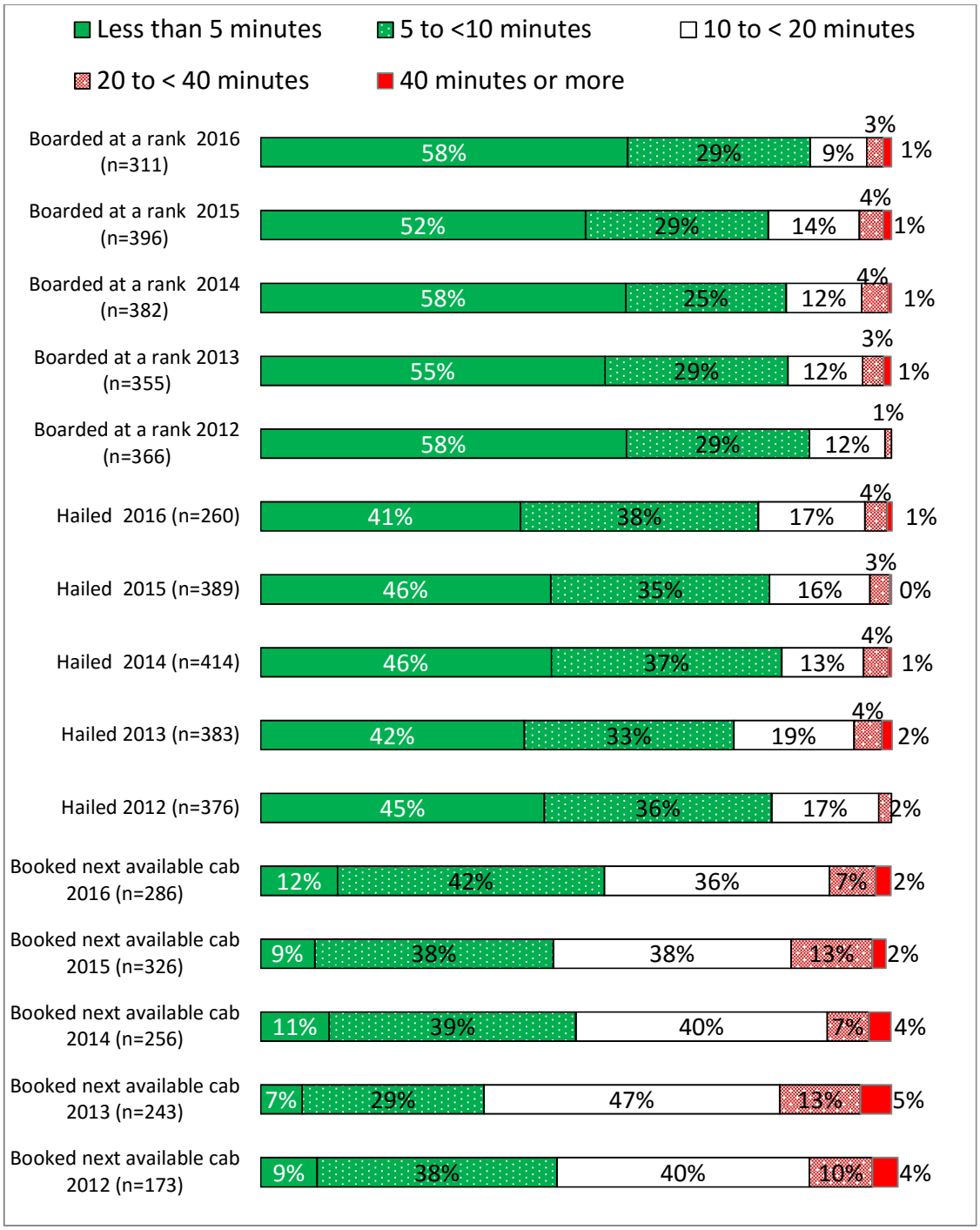
The samples using the different methods in Other Urban and Country locations in 2016, 2015 and 2014 are generally too small to allow firm conclusions to be drawn.

In 2016, for those who booked the next available taxi, there are n=94 in Other Urban and n=43 in Country locations. Waiting times when the next available taxi is booked appeared to be lowest in Country locations in 2016 as it was in 2015 and 2014. For Country plus Other Urban locations, 66% waited less than 10 minutes compared to 55% in Urban Sydney.

Very few of those asked about their most recent taxi trip waited at a rank in 2016 in Country locations (only n=18). The n=62 who did so in an Other Urban location almost all wait less than 10 minutes (90%), but this is only slightly higher than in Urban Sydney (87%). So few who hailed a passing taxi in Other Urban or Country locations in 2016 were asked that it is not possible to draw any conclusions about their waiting time.

The results are broadly similar to those obtained in in 2015 and 2014.

Figure 31. Waiting time by how taxi obtained Urban Sydney by survey year



Q23a. At the rank I had to wait …[IF Q22 = At a taxi rank]
Q23b. By hailing a taxi from the street I got a taxi in … [IF Q22 =Hailed/waved down]
Q24a. After the taxi was booked, I had to wait … [IF Q24= The "next available" taxi]

6.3. Arrival time performance

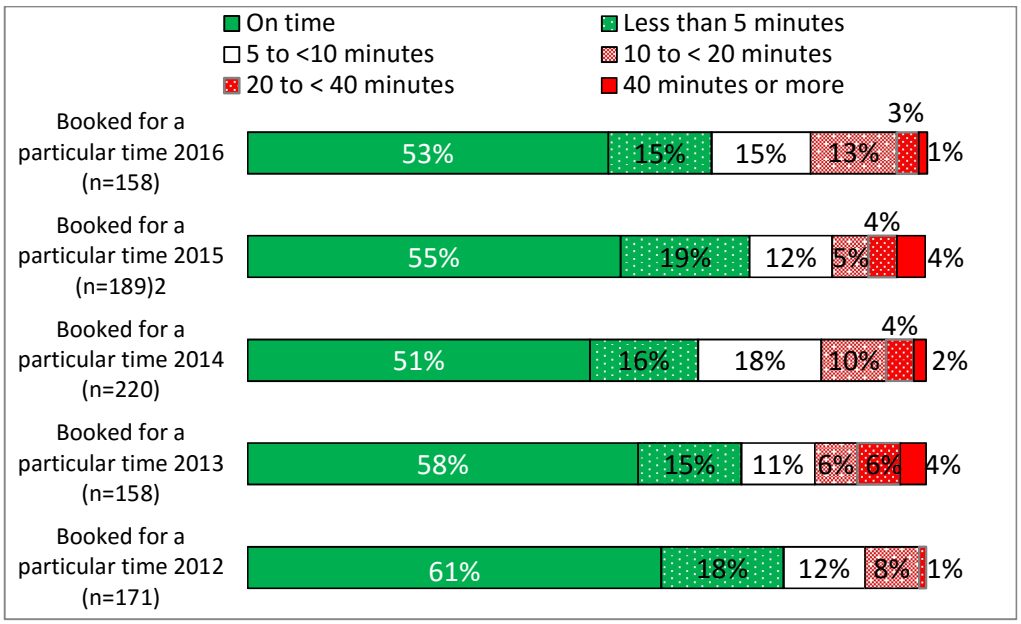
Figure 32 shows the arrival time performance of taxis booked for a particular time in the Urban Sydney region from 2012 to 2016.

With 53% on time, 15% being less than five minutes late, and another 15% being less than 10 minutes late, in 2016 83% had to wait less than 10 minutes and 68% less than five minutes. This compares to 86% less than 10 minutes and 74% less than five minutes in 2015 and 85% less than 10 minutes, 67% less than five minutes in 2014. This method thus consistently has the best overall "time to boarding" performance of obtaining a taxi other than boarding at a rank.

The fluctuations in on time arrival for this method of obtaining a taxi are consistent with the variations being entirely due to chance given the relatively small sample sizes. No trend is evident.

The samples for those who booked a taxi for a specific time in Other Urban (n=2) and Country (n=29) locations in 2016 are too small to allow any conclusions to be drawn about comparative performance, although both had very high percentages arriving on time (71% and 86%).

Figure 32. Taxi arrival time performance - booked for a particular time, Urban Sydney by survey year



Q24b. The taxi arrived …
ASKED IF: Q24 = booked a taxi for a particular time

6.4. Waiting time and origin

In 2013 it appeared that some modes of obtaining a taxi in Sydney showed differences in waiting time as a function of origin.

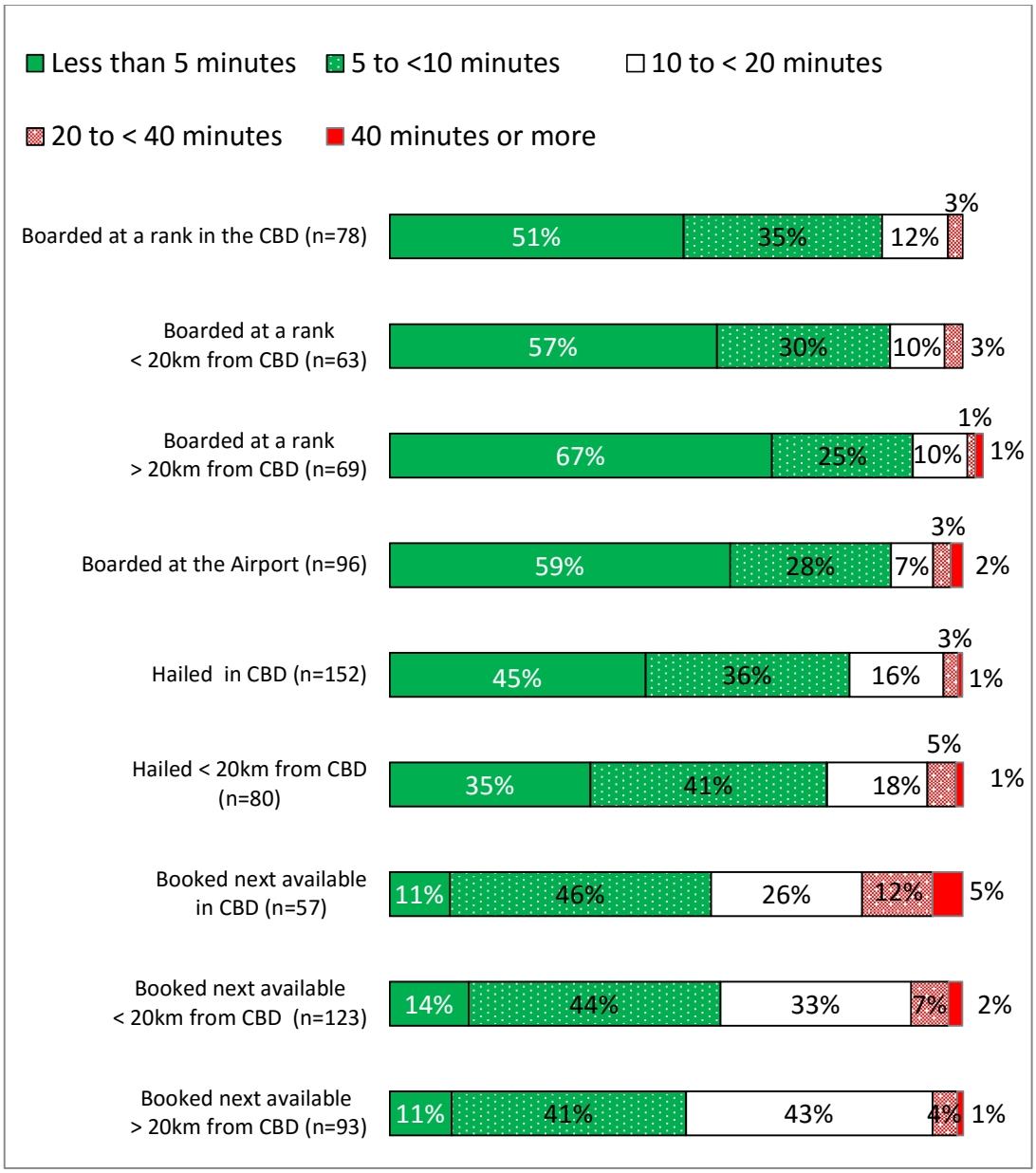
Figure 33 shows the breakdowns for 2016. As in previous surveys, the sample bases for some of these breakdowns are relatively small. Those with less than 20 responses are excluded. Results for those with less than 50 should be treated with great caution.

The 2016 results confirm the consistent finding in all surveys to date of longer waiting times reported when the next available taxi was booked for every starting point. In general, the method used to obtain the taxi is more important than where the taxi is obtained.

There are no substantial or significant differences by the location or the origin of the trip within methods. Booking the next available consistently produced the longest waiting times followed by hailing a taxi.

For all methods, waiting times of over 10 minutes are not common in 2016, if hailing the taxi or taking a taxi at a rank, (reported by 12% to 24%), but are much more often reported by those who booked the next available taxi (by 42% -48%). Waiting times of 20 minutes or more are rare (reported by 2% to 6% for hailing a taxi or taking one at a rank, but reported by 5% to 18% if the next available taxi is booked).

Figure 33. Waiting time by origin and how taxi was obtained
Urban Sydney 2016



Q14. On my most recent taxi trip, I started my journey …
Q23a. At the rank I had to wait …[IF Q22 = At a taxi rank]
Q23b. By hailing a taxi from the street I got a taxi in … [IF Q22 =Hailed/waved down]
Q24a. After the taxi was booked, I had to wait … [IF Q22= The "next available" taxi]
NOTE: Treat with caution where n<50. Where n<20, result not shown.

6.5. Calling back on non-arrival

When a booked taxi does not arrive the customer can call back to find out what has happened.

Variations by location (Urban Sydney, Other Urban and Country) and within the Urban Sydney sample by journey origin, distance travelled, time of day and day of week are examined in the 2016 data (see Figure 34).

Call backs could be made because the taxi was not on time (when booked for a specific time) or did not come quickly enough (when the next available taxi was booked). These are combined in Figure 34. The base numbers are restricted as the question was only asked if the taxi was late (booked for a specific time) or took more than ten minutes to arrive (booked next available).

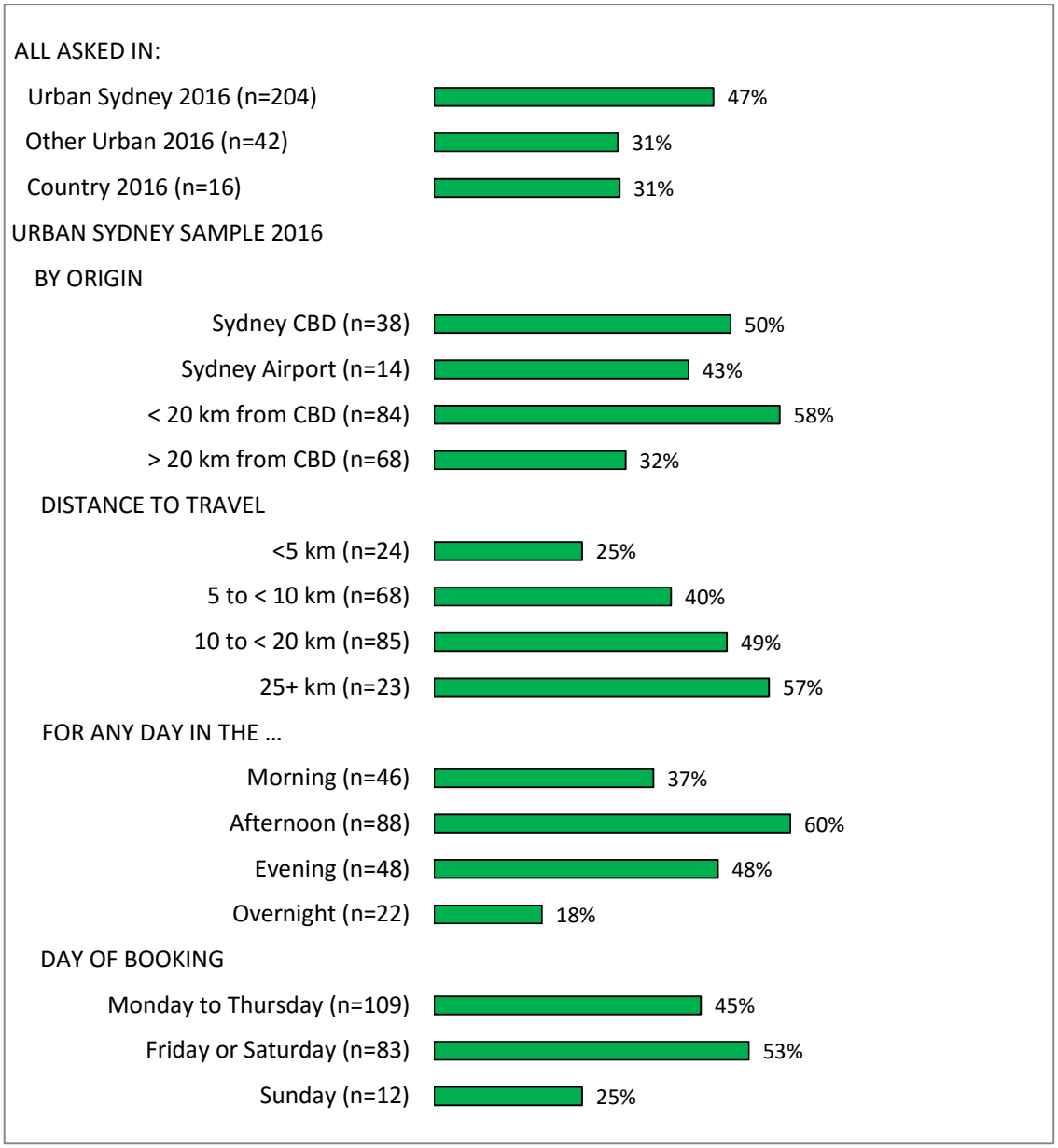
In 2016, the percentage reporting they had called back for delayed or late arrival varies somewhat with location (being most likely for those in Urban Sydney 47%), journey origin, distance to be travelled, time of day and day of week. The variations are generally not statistically significant. One clear pattern is the increase in calling back with the length of the trip being taken, from 25% for trips of under 5kms to 57% for trips of 25 kms or more.

Overall, the variations found could all have occurred by chance given the often small sample sizes and the relatively small differences.

Calling back in the Urban Sydney 2016 sample (47%) is quite similar to the result for 2015 (53%) and 2014 (43%). Given the relatively small samples for the other regions, the variations found are consistent with chance fluctuations.

In 2016, 15% in Urban Sydney, 5% in Other Urban and none of the small Country sample asked, reported the driver had called them. This could forestall calling back by the passenger although some of those called by the driver would not have called themselves.

Figure 34. Calling back for taxi non-arrival by location - 2016



Q24c Which did you do? [I called again because the taxi was not on time / I called again because the taxi did not come quickly enough / I did not call again]
Graph shows total calling again for those who booked for a specific time and the taxi was late, and those who booked the next available, and the taxi took 10 minutes or more to arrive.
NOTE: Treat with caution where n<50. Where n<20, result not shown.

6.6. Satisfaction with waiting time

Those in 2016 asked about their last taxi trip who recalled having booked a taxi for the next available time or for a specified time were asked how satisfied they were with the time they waited for the taxi.

The ratings given are shown in Figure 35, broken down by location, and (for all who replied) by whether the respondent was able to get a taxi and (if not) why not, and by waiting time.

To maximise the base numbers for the longer waiting times, data for the different modes of catching a taxi are combined. For those who had booked for a specific time, "on time" and "less than 5 minutes" are combined. For all, "20 to less than 40 minutes" and "40 minutes or more" are combined. To maximise the power to detect effects of not being able to get a taxi and of waiting time, the total sample across all locations is used in the breakdowns.

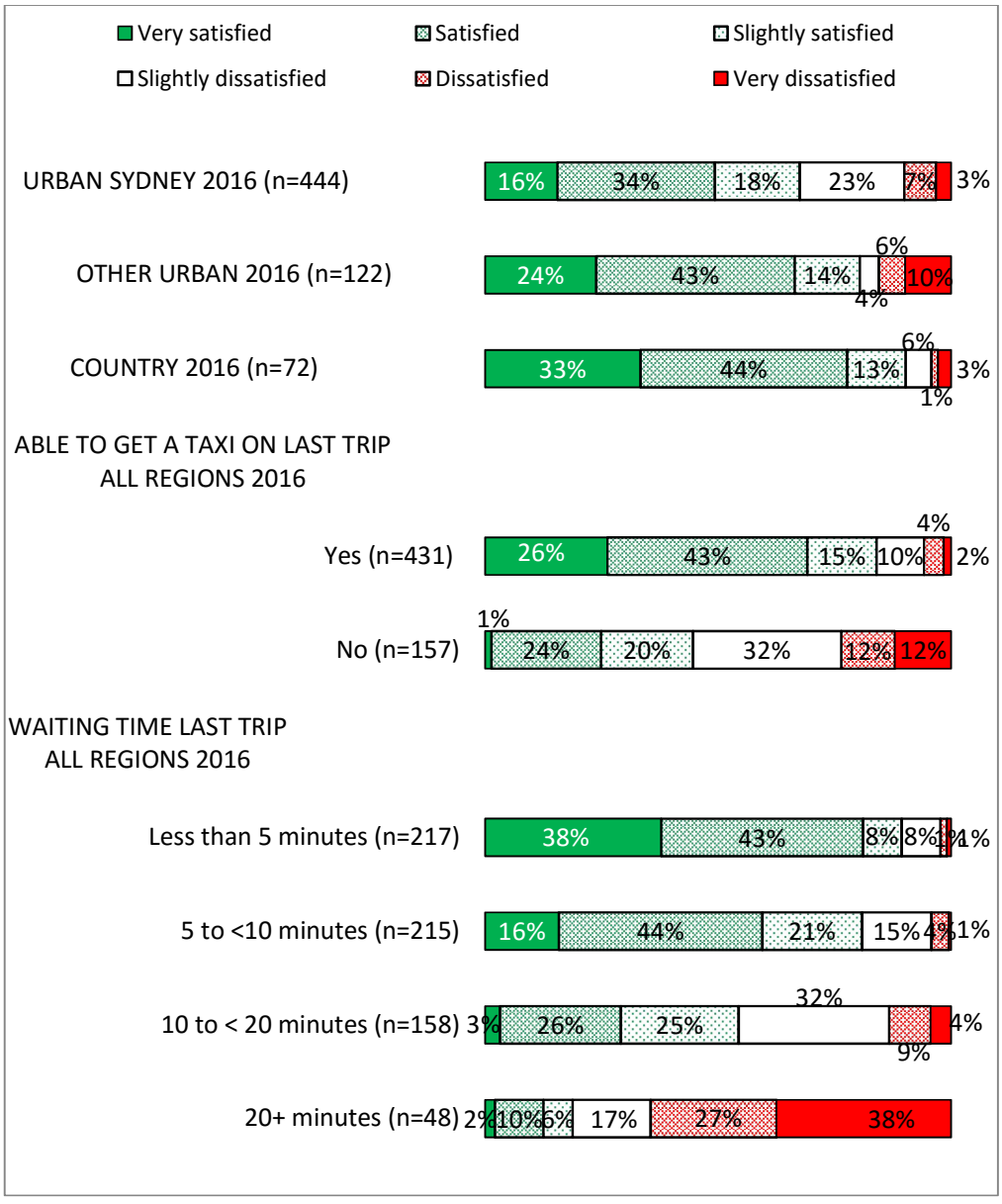
Overall at least two in three (68% in Urban Sydney, 80% in Other Urban, and 90% in Country) are at least slightly satisfied with the waiting time and half or more (Urban Sydney 49%, Other Urban 66%, Country 78%) are satisfied or very satisfied in 2016.

Satisfaction with the waiting time the last time they tried to catch a taxi is much lower if they are unable to catch one (45% of n=157) than if they had been able to get a taxi (84%).

Satisfaction varies most with the reported waiting time. Being very satisfied is high for waits of under five minutes (38%), much lower for waits of five to under 10 minutes (16%) and falls to 2% to 3% for longer waiting times. Being satisfied or very satisfied is a very high 81% for waiting times under five minutes, 60% for five to under 10 minutes, 29% for 10 to under 20 minutes, and 12% for 20 minutes or more. Being very dissatisfied is relatively common for waits of 20 minutes or more (38%) and very rare for waits of less than 20 minutes (1% to 4%). Being more than slightly dissatisfied falls from 65% of those waiting 20 minutes or more to 13% if waiting 10 to under 20 minutes, 4% if waiting five to under 10 minutes and 2% if waiting less than five minutes.

From these ratings it appears that waiting less than 10 minutes is acceptable to most people, and anything over 20 minutes is unacceptable to most.

Figure 35. Satisfaction with waiting time by location, ability to get a taxi and waiting time 2016



Q25. For the time I had to wait to catch this trip, I was ….

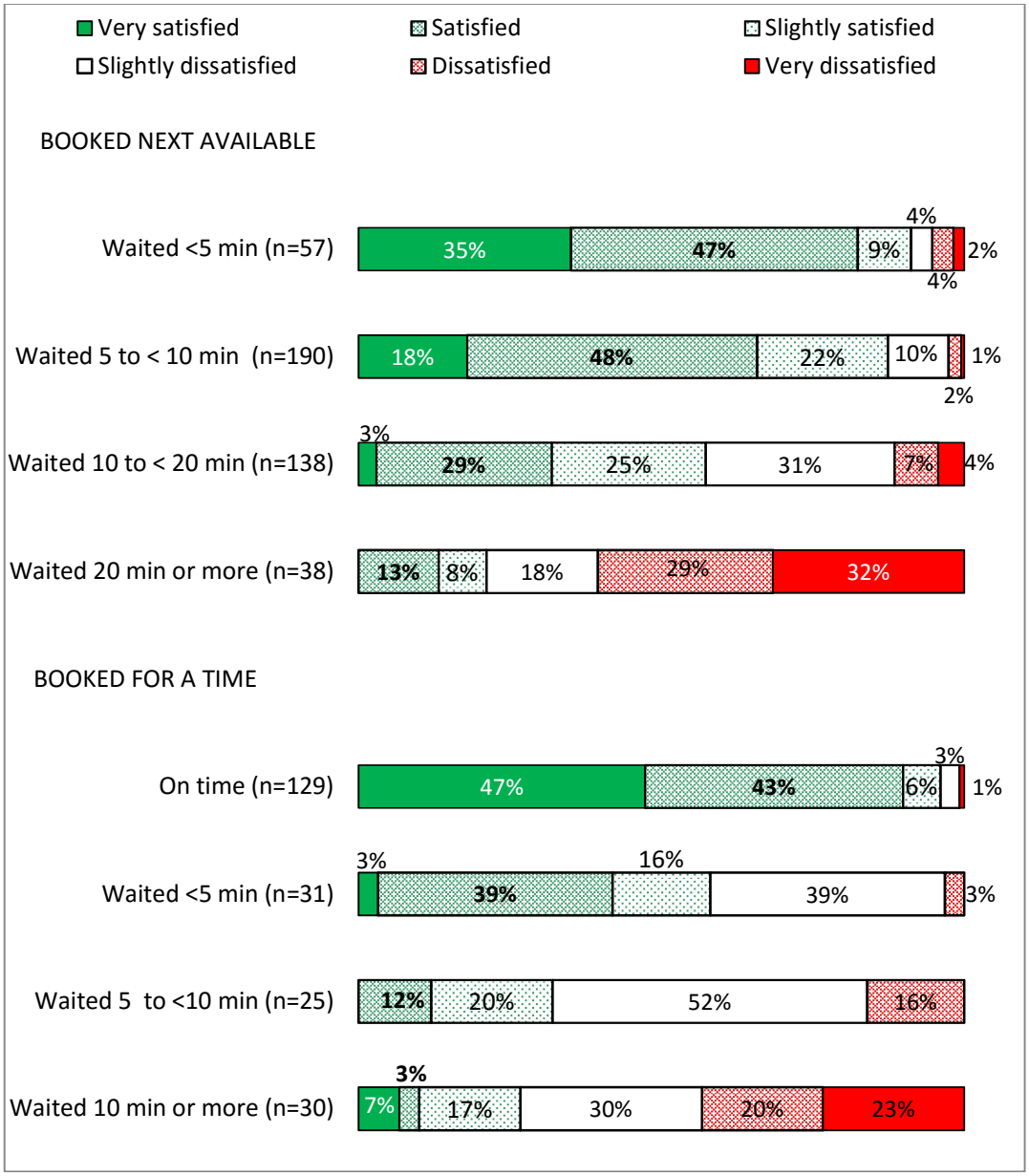
The total dissatisfied increases sharply with waiting time whether the next available is booked or the taxi is booked for a specific time. Over 40% are dissatisfied at least slightly if waiting times reach 10 minutes or more. The percentage very satisfied drops substantially when waiting time reaches five minutes or more.

Figure 36 summarises how satisfaction with waiting time varies with whether the next available taxi was booked or the taxi was booked for a specific time.

Where individual categories of waiting time had under n=20 respondents, they are combined with adjacent categories so that totals are at least n=20.

The total dissatisfied increases sharply with waiting time whether the next available is booked or the taxi is booked for a specific time. Over 40% are dissatisfied at least slightly if waiting times reach 10 minutes or more. The percentage very satisfied drops substantially when waiting time reaches five minutes or more.

Figure 36. Satisfaction with waiting time by how obtained taxi by waiting time 2016 (total sample)



Q25. For the time I had to wait to catch this trip, I was ….

NOTE: Treat with caution where n<50. Where n<20, result not shown.

6.7. Fares paid and payment method

Users asked about their last taxi trip were asked how much they had paid for their last trip, and what method they used to pay. Figure 37 shows the distribution of fares reported in the 2016 survey for Urban Sydney, Other Urban and Country locations.

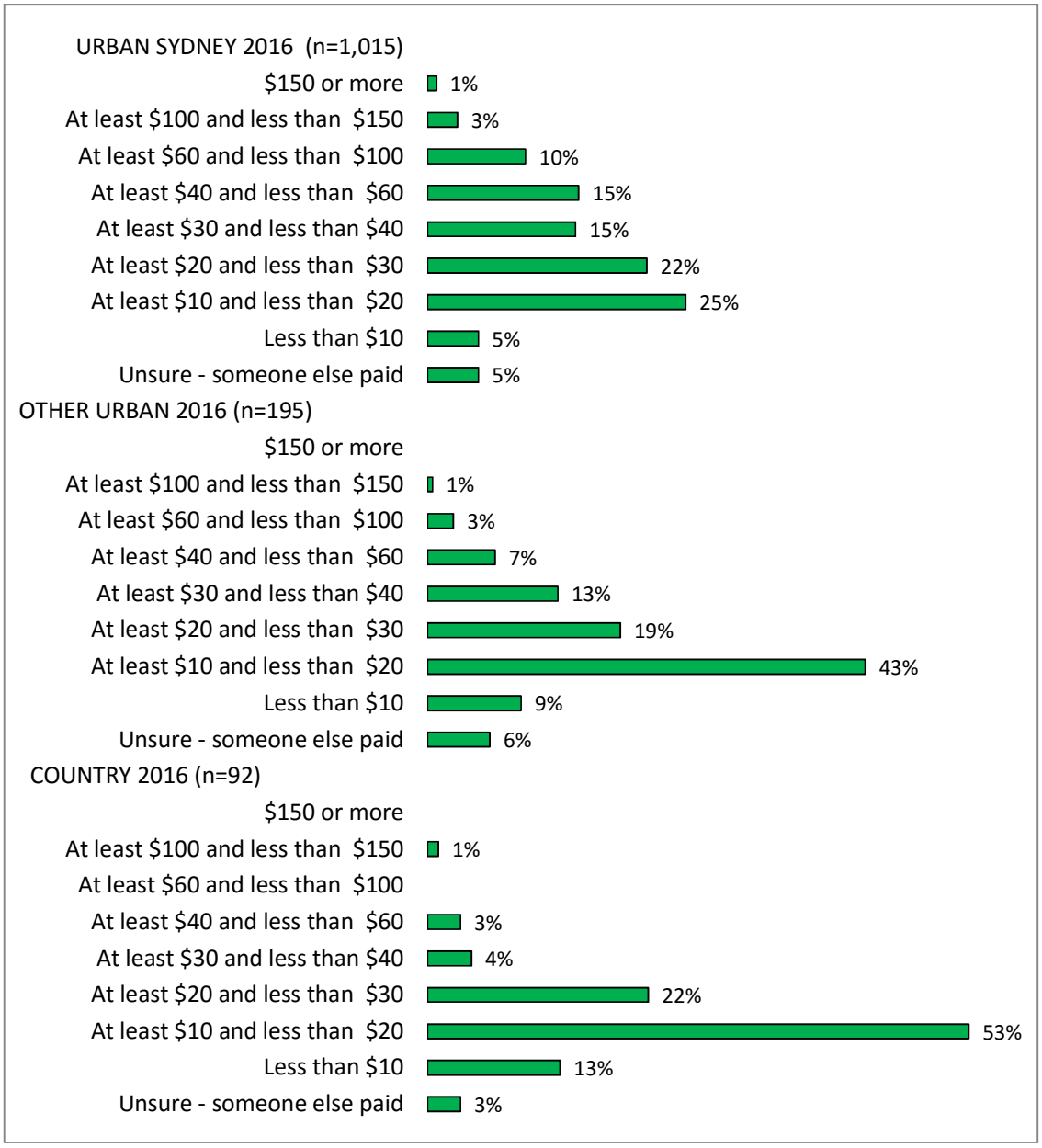
The median fare in 2016 in Urban Sydney is $28, very close to the 2015 and 2014 median fares. In Other Urban locations the median fare is less than $20 and in Country locations between $10 and $20. In Urban Sydney, there are some fares over $100 (4%) and a few over $150. In Other Urban and Country locations, fares rarely exceed $100 and are mostly under $40.

Fares are most likely to be paid in cash (52% in Urban Sydney, 63% in Other Urban and 72% in Country locations in 2016), with the proportions doing so being larger outside Sydney than in Urban Sydney (see Figure 38). Credit cards are about twice as likely to be used in Urban Sydney (24%) as in the other locations (11% and 13%), but debit cards are most likely to be used in Other Urban locations (19%) tending to be higher than use in Sydney (12%) or Country locations (9%). These patterns largely repeat those found in 2015.

Cabcharge is more likely to be used in Urban Sydney (8%) than in the Other Urban (3%) or Country (2%) locations, but is used by only a small minority in any location.

A few in Urban Sydney (1%) use a smart phone app to pay the fare (much lower than the 11% found in 2015). This payment method is not reported in the Other Urban and Country locations. A few use some other means not listed (none in Urban Sydney, 2% in Other Urban and 1% in Country locations).

Figure 37. Amount paid on last taxi trip by location, 2016

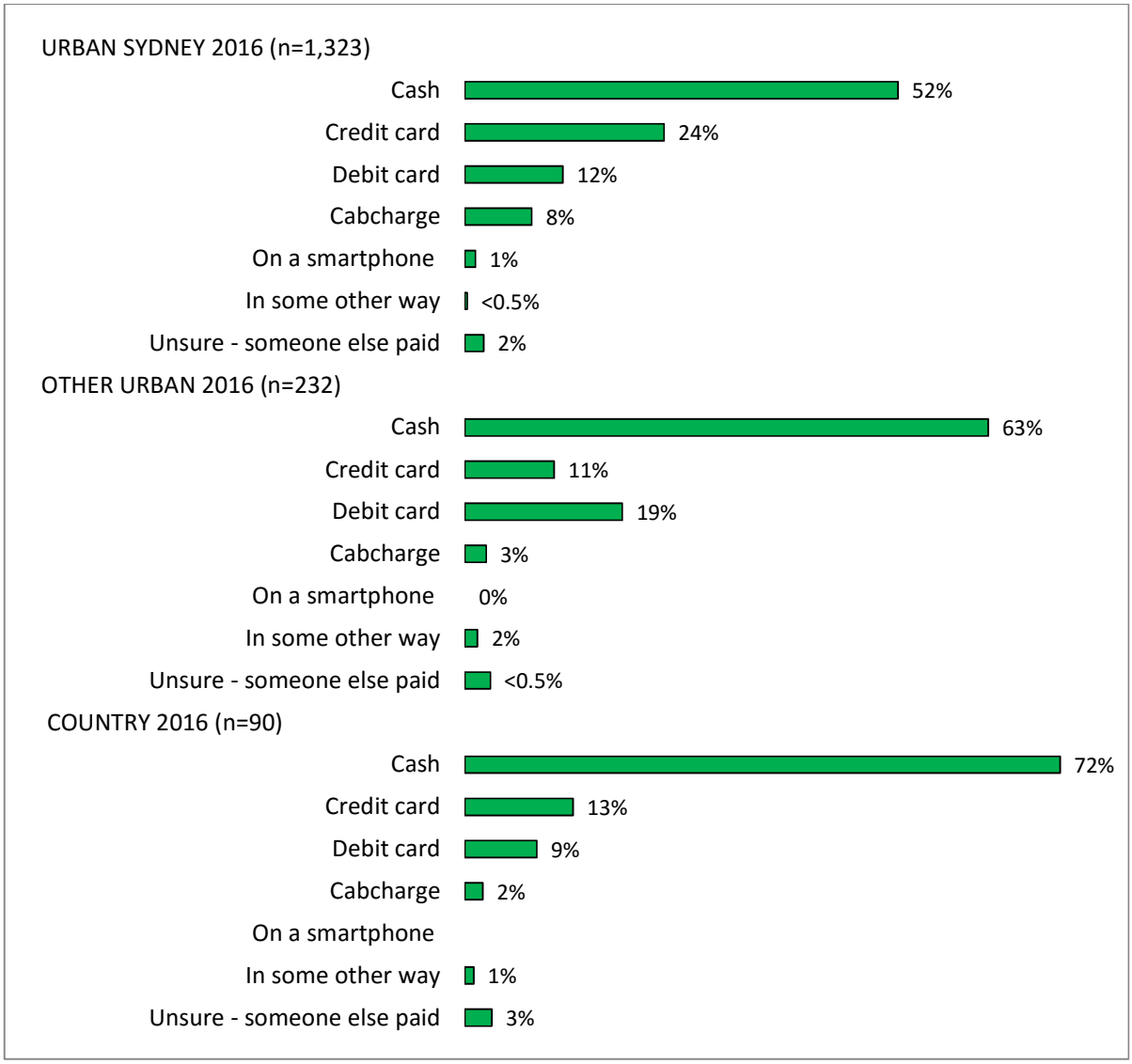


Q26 The fare, including any service fee for electronic payment, was …

As in 2014 and 2015, in 2016 cash is more likely to be used for lower fares, and a card of some type is more likely to be used as the fare increases. Using the total sample replying to this question, we find:

- 79% use cash and 16% a card for fares under $10 (n=81)
- 71% use cash and 28% use a card for fares of $10 to under $20 (n=391)
- 57% use cash and 42% use a card for fares of $20 to under $30 (n=276)
- 44% use cash and 51% a card for fares of $30 to under $40 (n=361)
- 45% use cash and 53% use a card for fares of $40 to under $60 (n=167)
- 34% use cash and 65% a card for fares of $60 or more (n=186)

Figure 38. How fare paid on last taxi trip by location, 2016

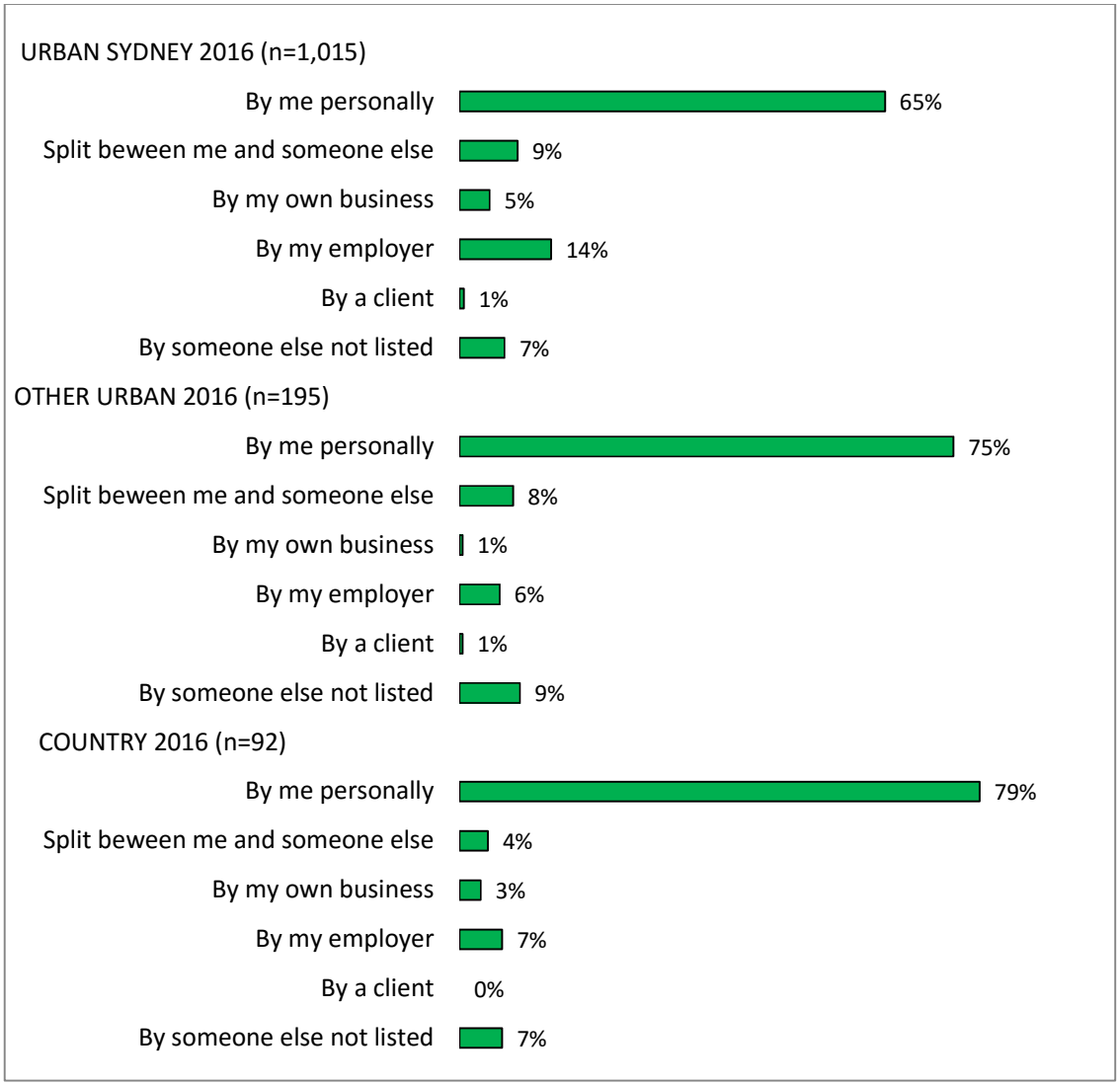


Q27 The fare was paid by ….

Over half the respondents paid for their last trip themselves (see Figure 39), ranging from 65% of the Urban Sydney respondents to 75% of Other Urban and 79% of Country respondents. While 14% are paid for by the employer and another 5% by the respondent's own business in Urban Sydney, these are much less common in Other Urban (6% and 1%) and Country (7% and 3%) locations; 1% or less are paid by a client; 4% to 9% split the fare with someone else and a few fares (7% to 9%) were paid by someone else not listed (see Figure 39).

These results are very similar to those found in 2015.

Figure 39. Who covered the fare on last taxi trip by location, 2016



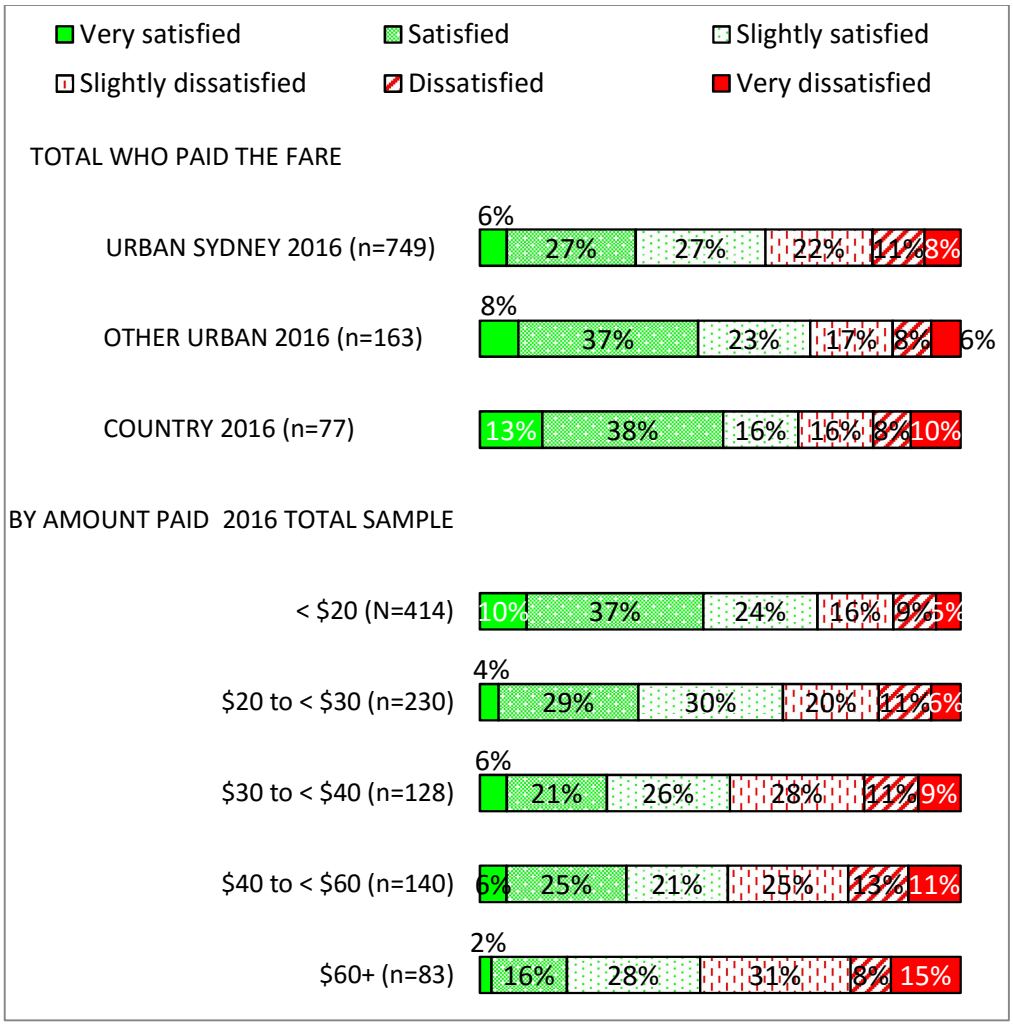
Q28 The cost of the trip was covered …

As Figure 40 shows, in Urban Sydney, slightly more are satisfied than dissatisfied with the fare paid (satisfied 59%; dissatisfied 41%) while clear majorities are satisfied in the other two locations (69% in Other Urban and 66% in Country locations). Few give extreme ratings with many choosing one of the two middle replies. These results are very close to those obtained in 2015 and 2014.

In the total sample, those who pay under $20 are the most likely to be very satisfied or satisfied (47% of n=414) with little difference by fare paid above $20 (26% to 33% except for those paying $60 or more, 18%). Being dissatisfied or very

dissatisfied increased from 14% if the fare is under $20, to 17% to 23% for fares of $20 or more. Thus the strength of dissatisfaction increases with the fare paid up to $60, and stronger satisfaction is reduced if the fare paid is $20 or more and especially if it is $60 or more.

Figure 40. Satisfaction with taxi fare paid by amount paid by location - 2016

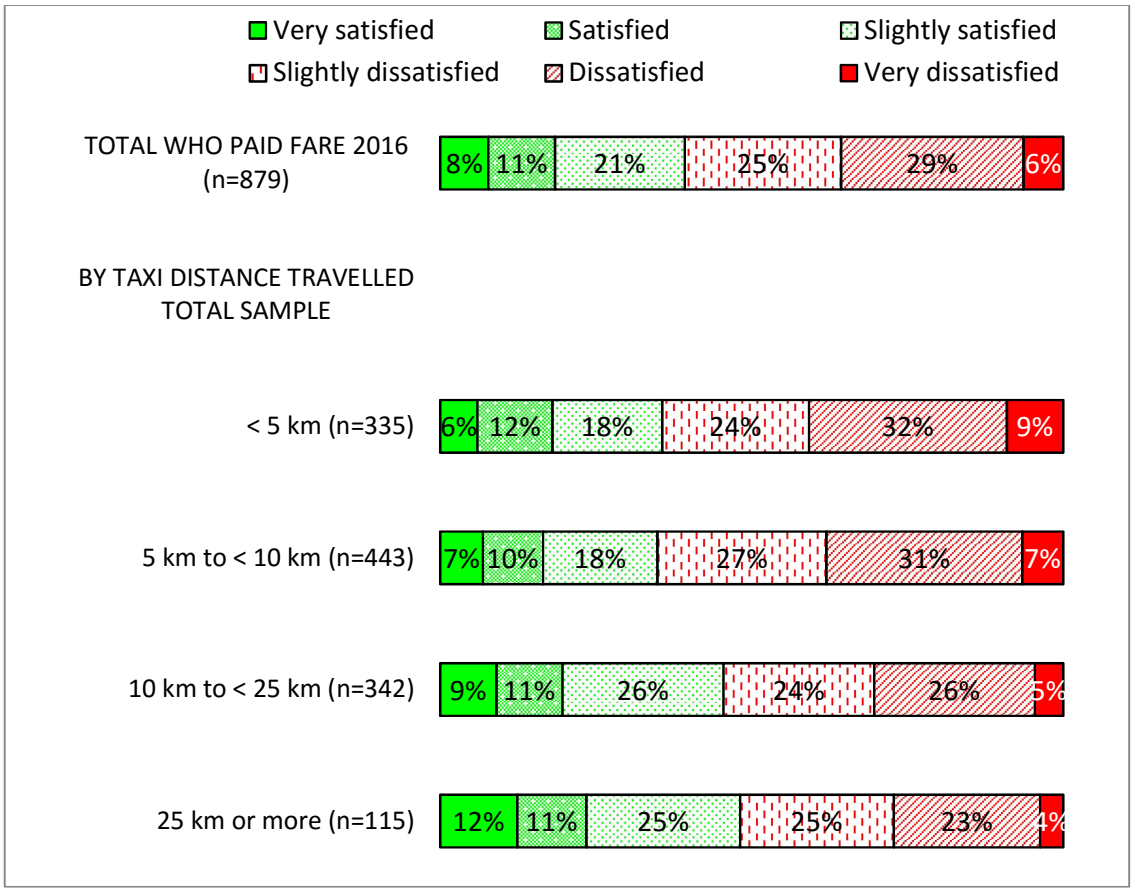


Q29. For the amount I paid for this trip, I was ….

When data from all locations in 2016 are combined to maximise the sample sizes, being dissatisfied or very dissatisfied with the fare paid is slightly more common where the distance travelled was 10 kms or more than when it was under 10 kms (see Figure 41). Being very satisfied or satisfied showed the reverse pattern. While statistically significant, the effect is not large, with 35% satisfied with the fare on journeys under 10 kms and 46% for journeys of 10 kms or more.

There is little difference in the distribution of satisfaction with the fare paid in Urban Sydney from year to year.

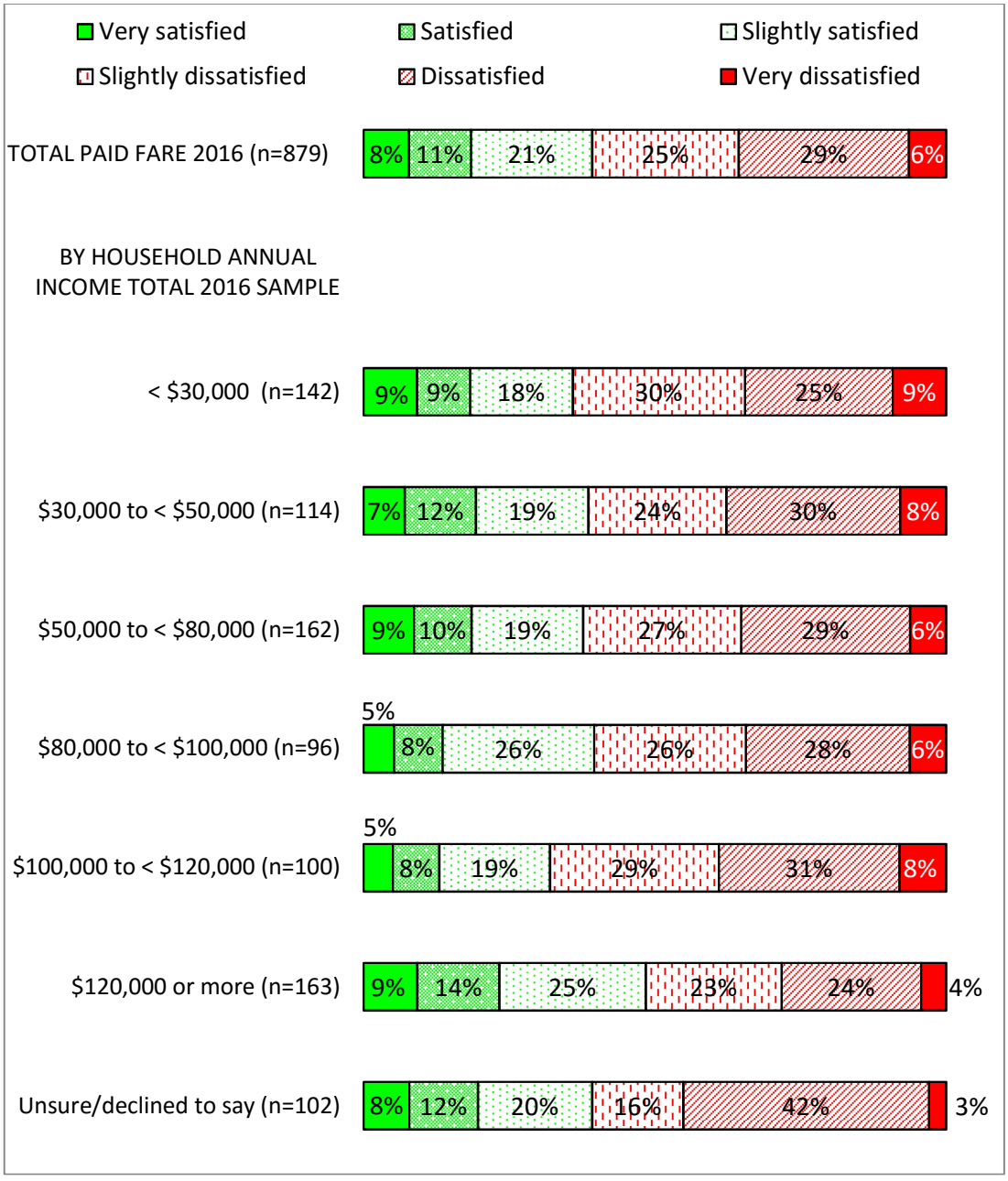
Figure 41. Satisfaction with taxi fare paid by distance travelled, 2016



Q29. For the amount I paid for this trip, I was ….

Household income showed little relationship to satisfaction with the fare paid (see Figure 42).

Figure 42. Satisfaction with taxi fare paid by household annual income - 2016



Q29. For the amount I paid for this trip, I was ….

Those who cross Sydney Harbour by the Sydney Harbour Bridge or Sydney Harbour Tunnel going south have to pay the toll in addition to the fare, so this might impact on the level of satisfaction.

Among those who had paid the fare themselves, being very dissatisfied or dissatisfied with the fare paid is 16% for those

making the crossing going south (n=80), 15% for those making the crossing going north (n=135), and 19% for those not making the crossing (n=534). Being very satisfied or satisfied is respectively 28% if going south, 38% if going north and 32% if not making the crossing.

There is no evidence that paying the toll affects dissatisfaction with the fare paid. There might be some effect on stronger satisfaction with the fare paid.

6.8. Purpose of trip

When asked about the purpose of the trip, offered in all years and in all locations, recreation is the most often chosen of the prompted options (see Figure 43 and Figure 44). However, in both Urban Sydney and in Other Urban lcoations, endorsements of recreation as the main reason for the trip are declining – from 52% in 2012 to 38% in 2016 in Urban Sydney, and from 51% in 2014 to 43% in 2016 in Other Urban. The changes for Country locations are less consistent and smaller.

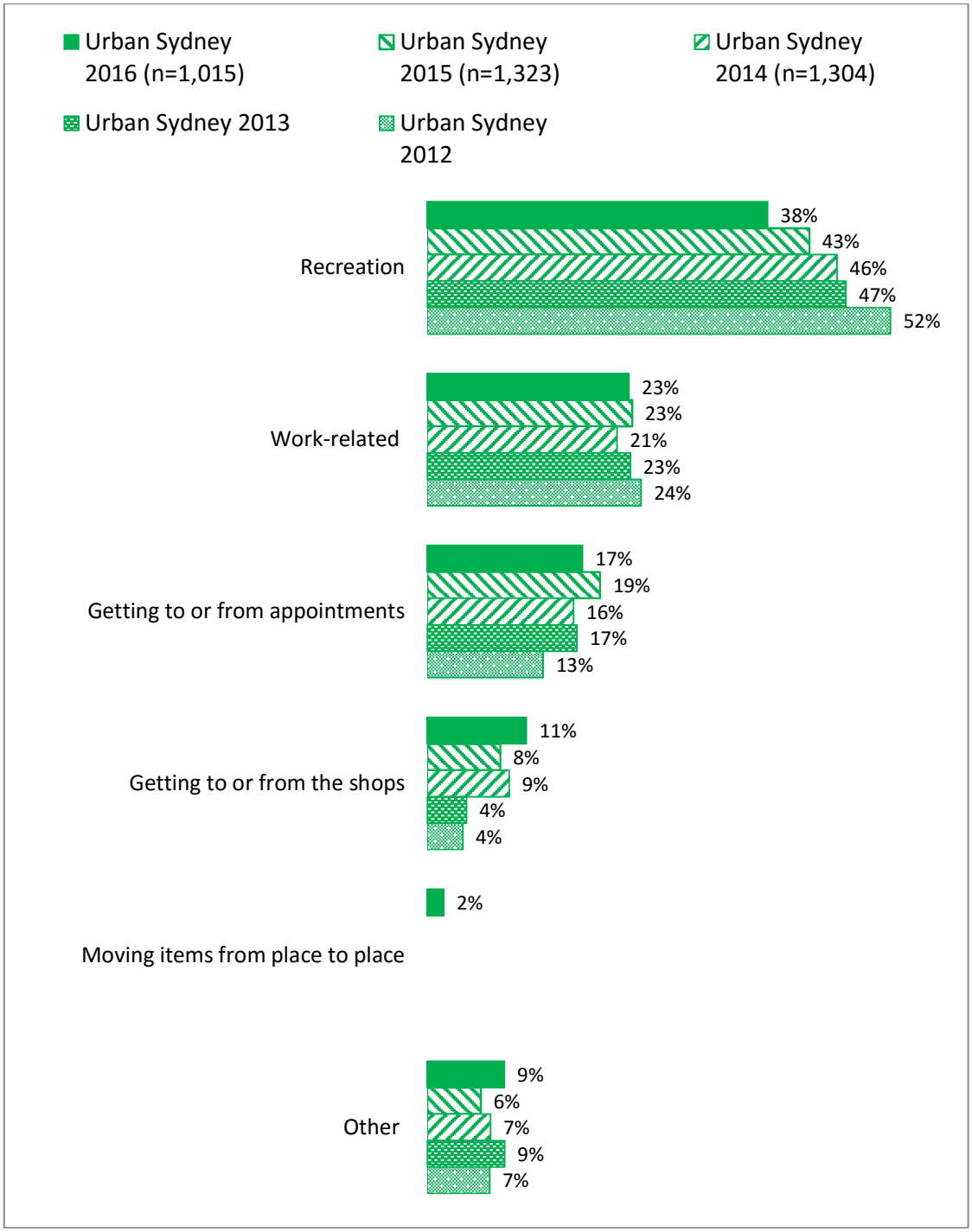
Work related trips come next in Urban Sydney. The percentage varies little for Urban Sydney across the four survey years (21% to 24%), but is consistently lower in Other Urban (13% in all three years) and Country locations (6% to 9%).

Getting to and from appointments account for some trips in Urban Sydney (13% in 2012 then 16% to 19%). Other Urban trips to and from appointments is steady (18% to 23%) while the results for Country locations are unstable (16%, then 28% then 18%).

Shopping trips are taken by a few (4% in 2012 Urban Sydney to 11% in 2016; 10% to 17% in Other Urban; and 11% to 12% in Country locations). While there is some variation this purpose is consistently the least likely to be reported.

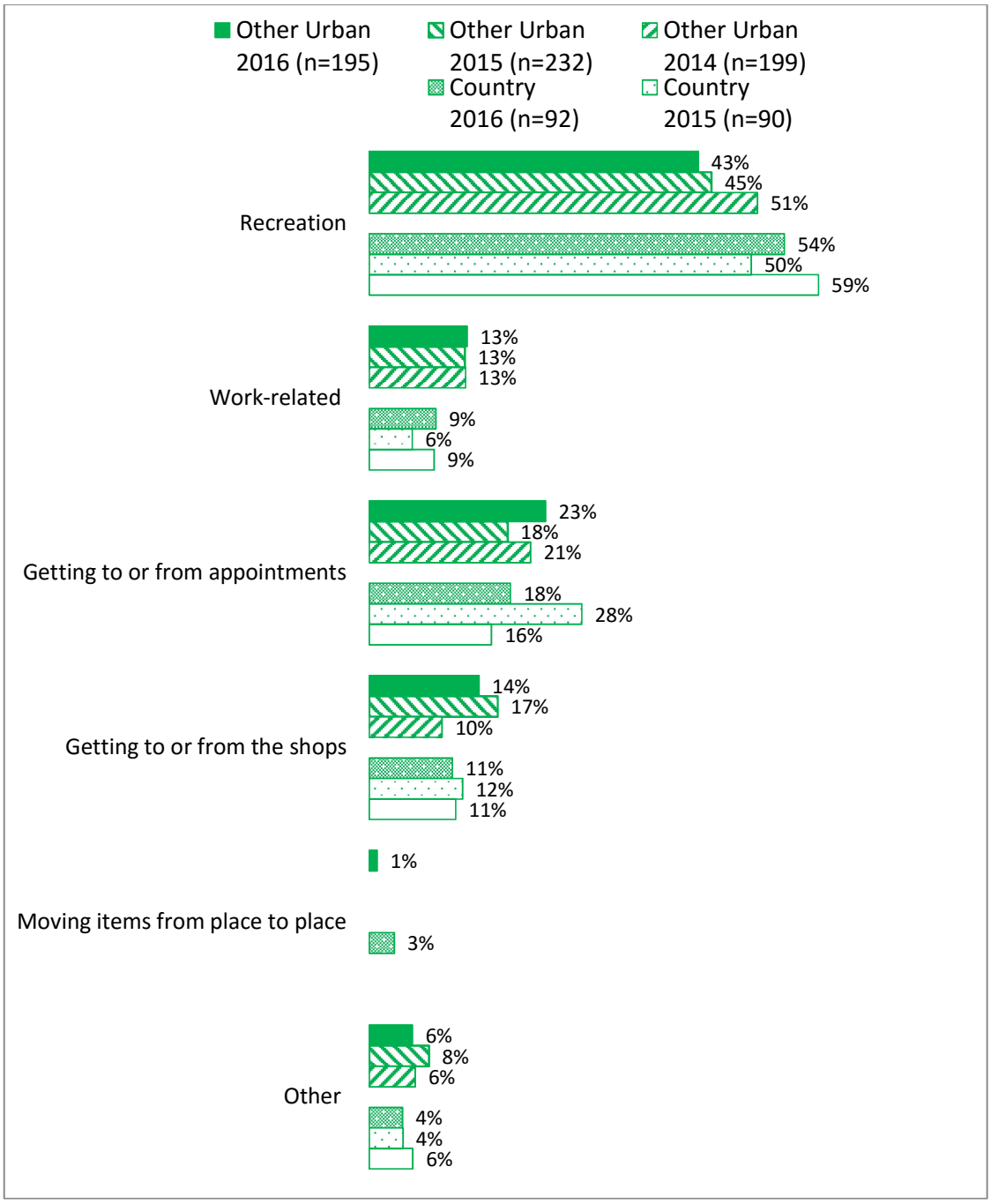
An option to endorse "Moving items from place to place" was added in 2016, and was endorsed by only 1% to 3% in any region. This clearly is an unusual purpose for taxi use.

Figure 43. Purpose of taxi trip – Urban Sydney by survey year



Q20 My main purpose in taking my most recent taxi trip in Sydney was …
Work-related (including getting home from work)
Getting to or from appointments / Getting to or from the shops / Recreation (such as entertainment, social visits, 'going out', including getting back home) / [2016 ONLY] Moving items from place to place / Other (such as education related)

Figure 44. Purpose of taxi trip – Other Urban and Country by survey year



Q20 My main purpose in taking my most recent taxi trip in Sydney was …
Work-related (including getting home from work)
Getting to or from appointments / Getting to or from the shops / Recreation (such as entertainment, social visits, 'going out', including getting back home) / [2016 ONLY] Moving items from place to place Other (such as education related)

Trips taken for work or business are more likely than others to be paid for by the business (52% in 2016, 54% in 2015), followed by getting to and from (perhaps work related) appointments (17% in 2016, 13% in 2015) and shopping (20% in 2016, 12% in 2015). Only 1% to 5% of trips for other purposes are paid for by the employer or the respondent's own business.

Trips for shopping or socialising are the most likely to be split with someone else (13% for both in 2016 compared to 3% to 7% for trips for other purposes).

6.9. Reason for taking a taxi

Respondents were asked to choose from a short list their main reason for taking a taxi on their most recent taxi trip. The results are summarised in Figure 45.

In Urban Sydney, taxi use is most often attributed to convenience in all locations from 2013 to 2016 (34% to 39%). Being quicker or more direct than other transport comes second (29% to 31%). Some considered taking a taxi as their only option (18% to 22%).

Those in Other Urban and Country locations (except in 2016) are also most likely to give convenience as their main reason for taking a taxi (36% to 41%). The exception is Country respondents in 2016, who gave their main reason as a taxi being the only available transport option (39%). In 2016 in country areas only 26% of the n=92 respondents gave convenience as the reason, well below previous years (37% to 40%). Having no other option is consistently next in Other Urban locations (30% to 36%), ahead of being quicker or more direct (16% to 21%).

Being cheaper is rarely reported (zero to 7%) and having a reason not listed is also relatively rare (6% to 14%).

Being more reliable was added as a listed reason in 2016 and might account to some extent for reductions in endorsements of other reasons. However, it was only chosen by 5% in Urban Sydney and 2% to 3% in Other Urban and Country locations.

The only substantial shift from year to year is the sharp drop in endorsements of convenience in country locations. Even with the small sample sizes (n=90 to n=99) this fall over three years is statistically significant.

Differences in the reasons given by frequency of use found in 2014 and 2015 were not repeated in 2016. Being quicker or more direct is no longer more often endorsed by more frequent users.

Lack of access to other means of transport is consistently more likely to be selected by those living in Other Urban (33% of n=195) or Country locations (39% of n=92) wherever they board the taxi (relative to the CBD) and least often by those boarding at the Airport or in or near the CBD in Urban Sydney (15% of n=791). Those boarding more than 20kms from the Sydney CBD were less likely than those in Other Urban or Country locations

to give this reason for taxi use (27% of n=224), but more likely than those boarding elsewhere in the Urban Sydney region.

Being quicker or more direct declined with distance from the CBD in Urban Sydney (39% of n=323 boarding in the CBD, 28% of n=333 within 20 kms, 21% of n=224 more than 20 kms, 26% if boarding at Sydney airport, n=135). This reason is reported consistently less in Other Urban and Country locations (16% of n=286). These differences are similar to those found in 2015.

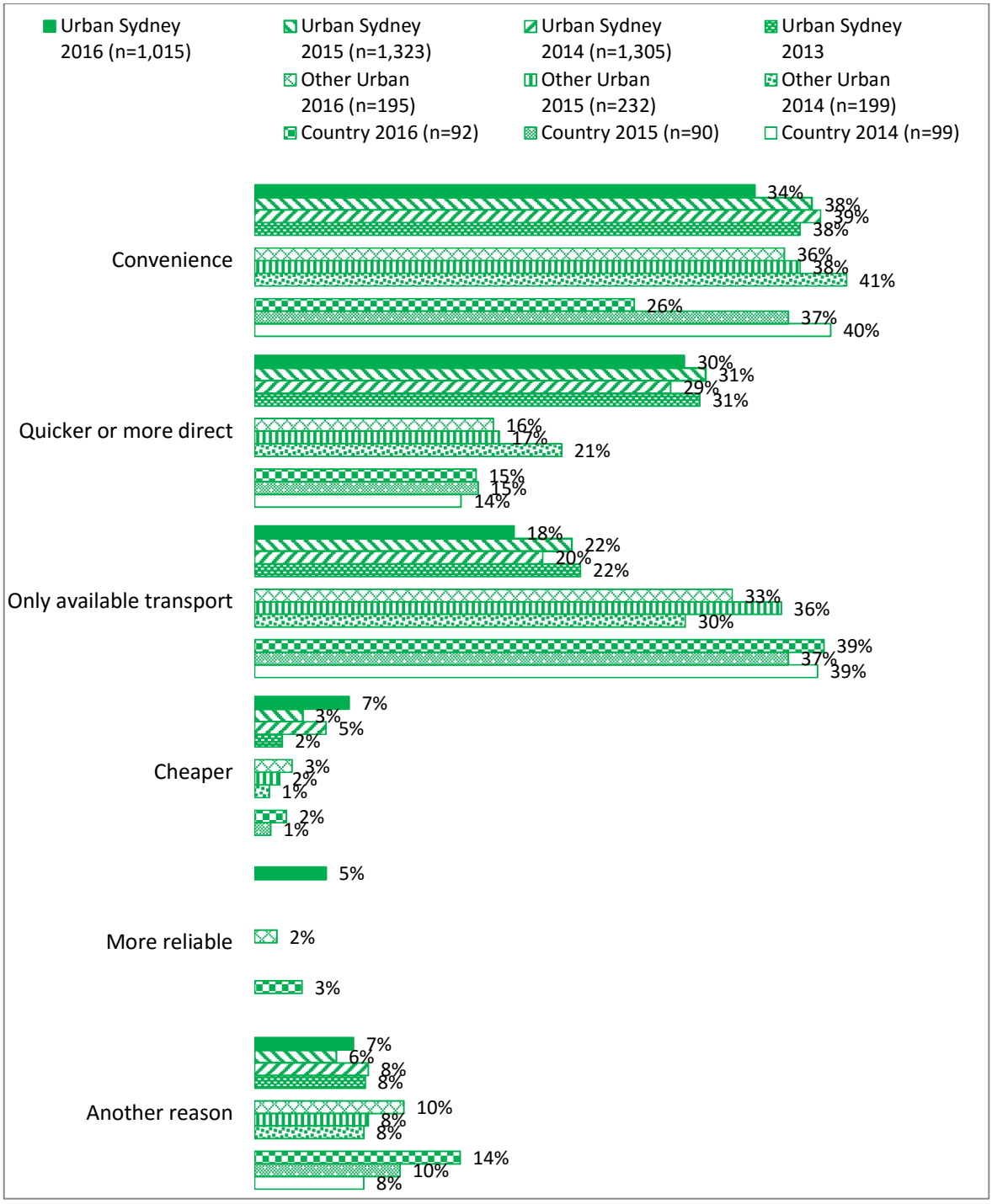
The small effect of distance to be travelled on giving "being quicker or more direct" as a reason for taking a taxi noted in 2015 and 2014 was not evident in 2016 with almost no variation by journey length (26% to 28%).

In 2016, convenience is somewhat more likely to be nominated as journey length increases (from 26% for journeys under 5 kms to 39% for journeys of 25 kms or more).

Variations by the day of the week are not consistent or significant in 2016.

Use of a taxi on trips commenced between 10pm and daylight is significantly more likely to be explained as due to lack of other options (33% of n=183 in the total 2016 sample) than trips started at other times (20% of n=1,119). This repeats an effect found for Urban Sydney respondents in 2015. Other differences evident in the 2015 data are not repeated in 2016.

Figure 45. Reason for taking a taxi by location and year



Q21 The main reason I took a taxi instead of other transport options was … Convenience (for example, I didn't have to worry about parking, I had luggage, I didn't want to get wet) / Taxi was quicker or more direct / Taxi was cheaper / I didn't have access to any other transport options / Another reason

7. Willingness to pay for a taxi and value for money

7.1. Willingness to pay by distance and cost

Respondents were asked to choose from a set of combinations of distance and cost the longest trip they would be willing to take if paying themselves. Results are summarised in Figure 46.

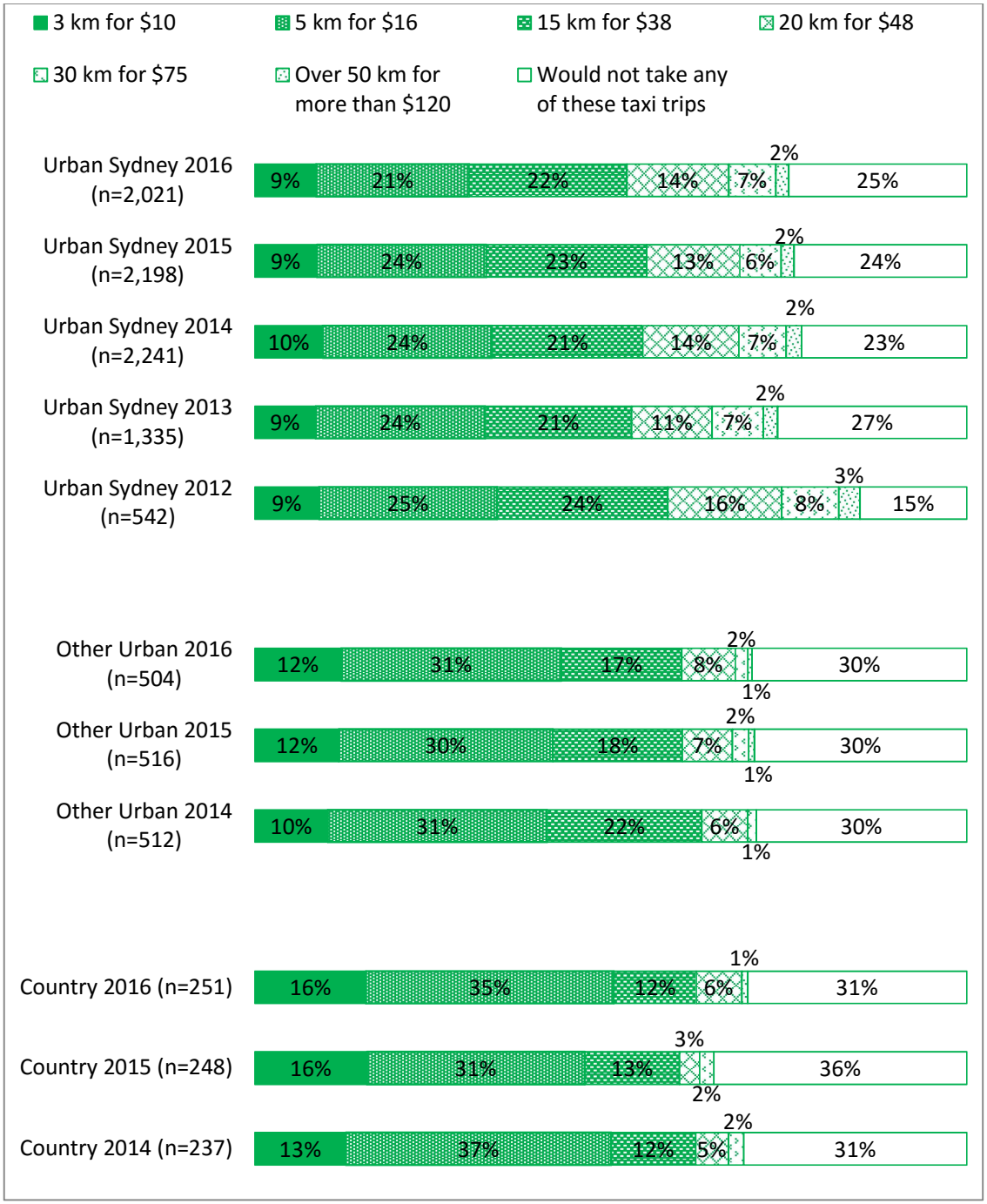
In summary, for Urban Sydney across the five years:

- 25% to 27% would not take any of the combinations offered, except in 2012 (15%) - very stable since 2013
- 9% to 10% would take only the shortest, cheapest trip (close to the results for each previous survey)
- Very few (2% to 3%) would be willing to take a trip of 50 km or more if this cost more than $120, and only 8% to 11% would take a trip of 30 km or more for $75 or more (very similar to the previous results)

Thus the Urban Sydney samples from 2013 to 2016 are willing to pay less and less willing to take trips of around 15 or 20 kms at the stated prices than those in the 2012 sample (even though real value of the fares has declined due to inflation).

In 2016, 2015 and 2014, those outside Sydney are more price sensitive than those in Urban Sydney. Specifically, those in Other Urban (30% in all three years) and Country locations (31% to 36%) are more likely than those in Urban Sydney (23% to 25% in the same three years) to say they would not take any of the trips at the prices offered. The Other Urban and Country samples are less willing to take trips of 20 kms or more than those in Urban Sydney (7% to 10% in Other Urban, and 7% to 9% in Country locations, compared to 21% to 23% in Urban Sydney) and also to take trips of 15 kms or more at the stated prices (Other Urban 23% to 25% and Country locations 18% to 19% compared to Urban Sydney 43% to 45%).

Figure 46. Longest taxi trip respondent willing to pay for by survey year and location



Q3a In the next 6 months if I were paying all the fare myself, the longest trip I would be willing to take by taxi from those listed below would be ….

It appears that price sensitivity has remained very stable from 2013 on, is greatest in the Country towns, perhaps slightly less in Other urban locations and lowest in Urban Sydney.

7.2. Trips seen as offering good value for money

Respondents were asked a series of questions about different trip scenarios and asked if taxis offered good value for money or not for each scenario.

After asking for overall opinions, specific types of trip are described for combinations of time of day with day of week, for short trips and long trips. For these scenarios an additional response option was offered, allowing respondents to say they did not know because they did not take that type of taxi trip.

Figure 47 shows how replies varied with the scenario.

Most respondents do not consider taxi trips offer good value for money overall or for any of the scenarios covered by these items.

In 2016 the highest percentage endorsing good value for money is for "short trips" (35%, in 2015 31%) with all other scenarios seen as good value by only 20% to 28% (19% to 23% in 2015) of taxi users. Only 28% (20% in 2015) consider taxis in general offer good value for money.

These results are very close to the results obtained in 2015, 2014 and 2013, although slightly higher for some scenarios than in 2015.

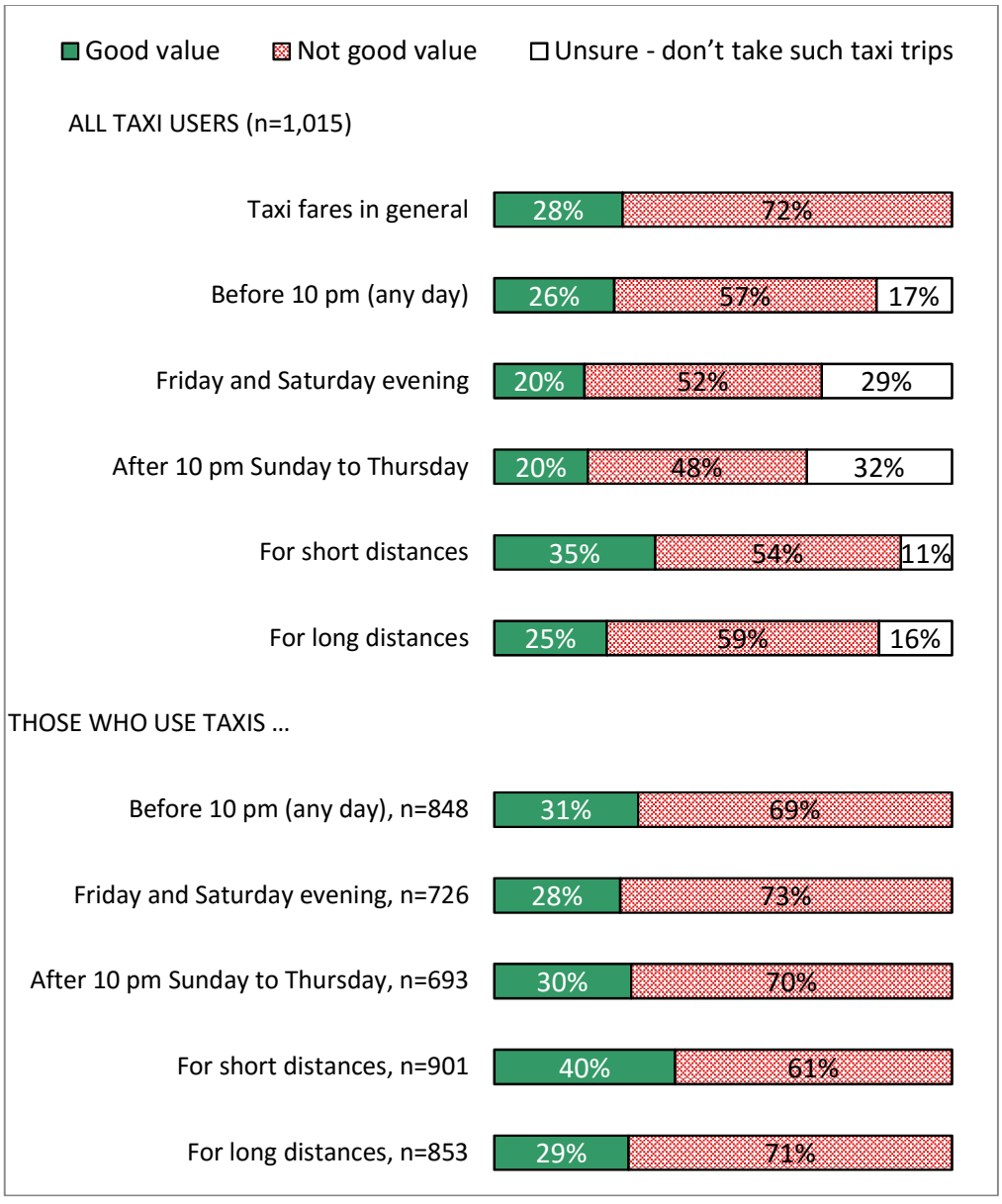
Among those who have taken a taxi in the circumstances described in a scenario, between 28% and 31% consider use of a taxi to be "good value" for each of the day and time combinations.

Short trips are seen as good value by 40% of those who had taken such trips. Long trips are seen as good value by only 29% of those who had taken such trips (but up from 17% in 2014).

In 2016, Country users are the most likely to consider taxi fares in general are good value for money (44% compared to 31% for Other Urban locations, and 28% for Urban Sydney). A similar pattern is evident by location for two scenarios:

- For trips taken in the day and evening before 10pm (46% of n=75 country users, 34% of n=173 Other Urban users, and 32% of n=1,007 Urban Sydney users)
- For short trips (50% of n=96 country users, 42% of n=191 Other Urban users, and 40% of n=1,067 Urban Sydney users)

Figure 47. Trips seen as offering value for money Urban Sydney 2016



Q4: Overall I think taxi fares are 1. Good value for money / 2. Not good value for money

Q5 Taxi fares in the day and the evening (before 10 pm) are …

Q6 Taxi fares on Friday and Saturday evenings (after 10 pm) are

Q7 Taxi fares at night (after 10 pm) on Sunday to Thursday are …

Q8 Taxi fares for short distances (less than 5 km) are:

Q9 Taxi fares for long distances (more than 15 km) are:

Good value for money / Not good value for money / I'm not sure because I don't take (such) taxis

8. Reasons for not using a taxi

Those in Urban Sydney who had not considered using a taxi in the previous six months were asked their reasons for not doing so. Figure 48 summarises the answers obtained in 2016 and the results from a similar item asked in 2013 to 2015. Two additional reasons were listed in 2016 (Taxi use might not be safe, and Company policy).

Convenience and cost dominate the reasons given in all years. The addition of two other prompted reasons in 2016 did not reduce the prevalence of the two most commonly endorsed reasons.

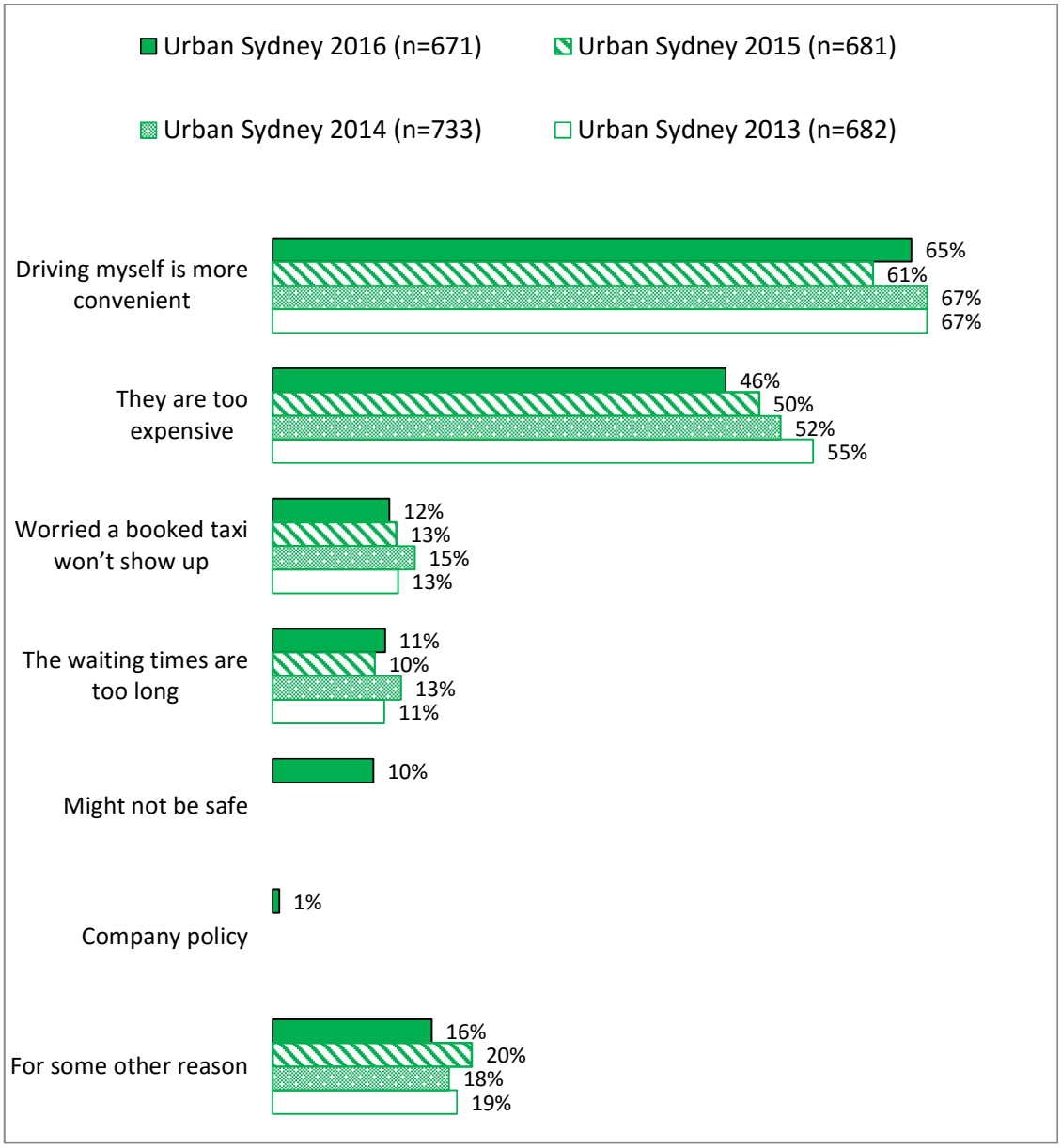
The other two aspects of service that are most often endorsed (the waiting time being too long, and failure to arrive when booked) could also be seen as aspects of convenience.

The Urban Sydney 2015 results are very close to those obtained in 2014, 2013 and 2012.

In 2016, 10% endorsed safety concerns, but this appears to be in addition to other reasons, as there is little reduction in endorsements of the other reasons. Company policy was endorsed by under 1% of Urban Sydney respondents.

These results confirm that the cost of use is a major barrier for those who do not use taxis, that concerns about whether a booked taxi will turn up or it will take too long to obtain a taxi are justifications for not using taxis, alongside the relative convenience of driving in a private vehicle.

Figure 48. Reasons for not using taxis in the past six months – Urban Sydney by survey year



Q41 I have not considered taking a taxi because
PROMPTED REASONS:
1. Driving myself is more convenient (2013 to 2016)
2. They are too expensive (2013 to 2016)
3. The waiting times are too long (2013 to 2016)
4. I am worried a taxi won't show up after I book one (2013 to 2016)
6. Taxi might not be safe (2016 only)
7. Company policy (2016 only)
5. For some other reason

9. Ride share services

Respondents were all asked how often they had in the past six months used ride share service. Those who had done so were asked a series of questions that parallel those asked for taxi users. Some of those who have done so were asked some questions about their last trip using a ride share service.

Chapter 4 discusses who uses ride share. This section of the report describes the use of ride share services in some more detail, beyond prevalence.

9.1. Change in use

The total Urban Sydney sample is much more likely to report using ride share services more (17%) than to be using these services less (9%) – the opposite of the difference for taxis (15% more, 24% less) as can be seen in Figure 49.

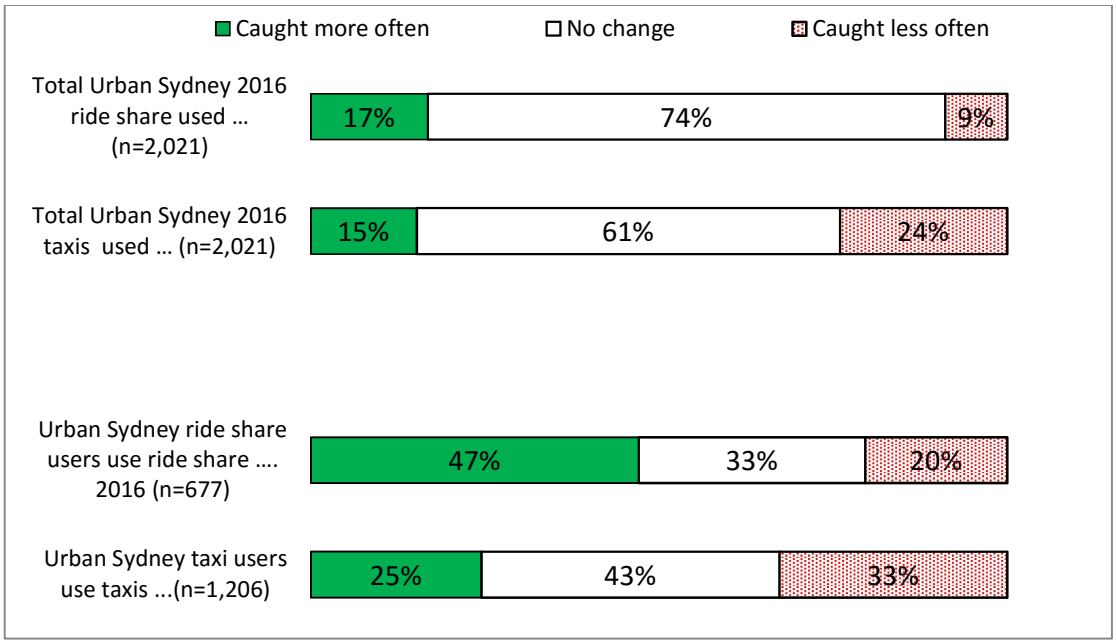
Those who report having used ride share services in the past six months are much more likely to say they are using the service more (47% of n=677) than say they are using it less (20% of n=677) while about one in three (33%) say their use has not changed.

A few of those who say they have not used ride share in the past six months report using it more in the past twelve months than in the previous twelve months (2%), with slightly more saying they are using ride share less (3%), and most saying they have not changed their use (85%). Note that it is possible that someone could have increased use but this might be confined to the first half of the year before they completed the survey.

Even among taxi users, the balance between those saying they use taxis more (25% of n=1,206) and that they use taxis less (33%) is in the opposite direction to reported changes in ride share use among ride share users (47% more, 20% less).

Clearly, Urban Sydney residents believe their taxi use is declining, while their use of ride share services is increasing. This is consistent with the sharp increase from 2015 in the reported use of ride share services, but not with the lack of change in the reported use and reported frequency of use of taxis.

Figure 49. Change in frequency of using ride share services and taxis for Urban Sydney 2016



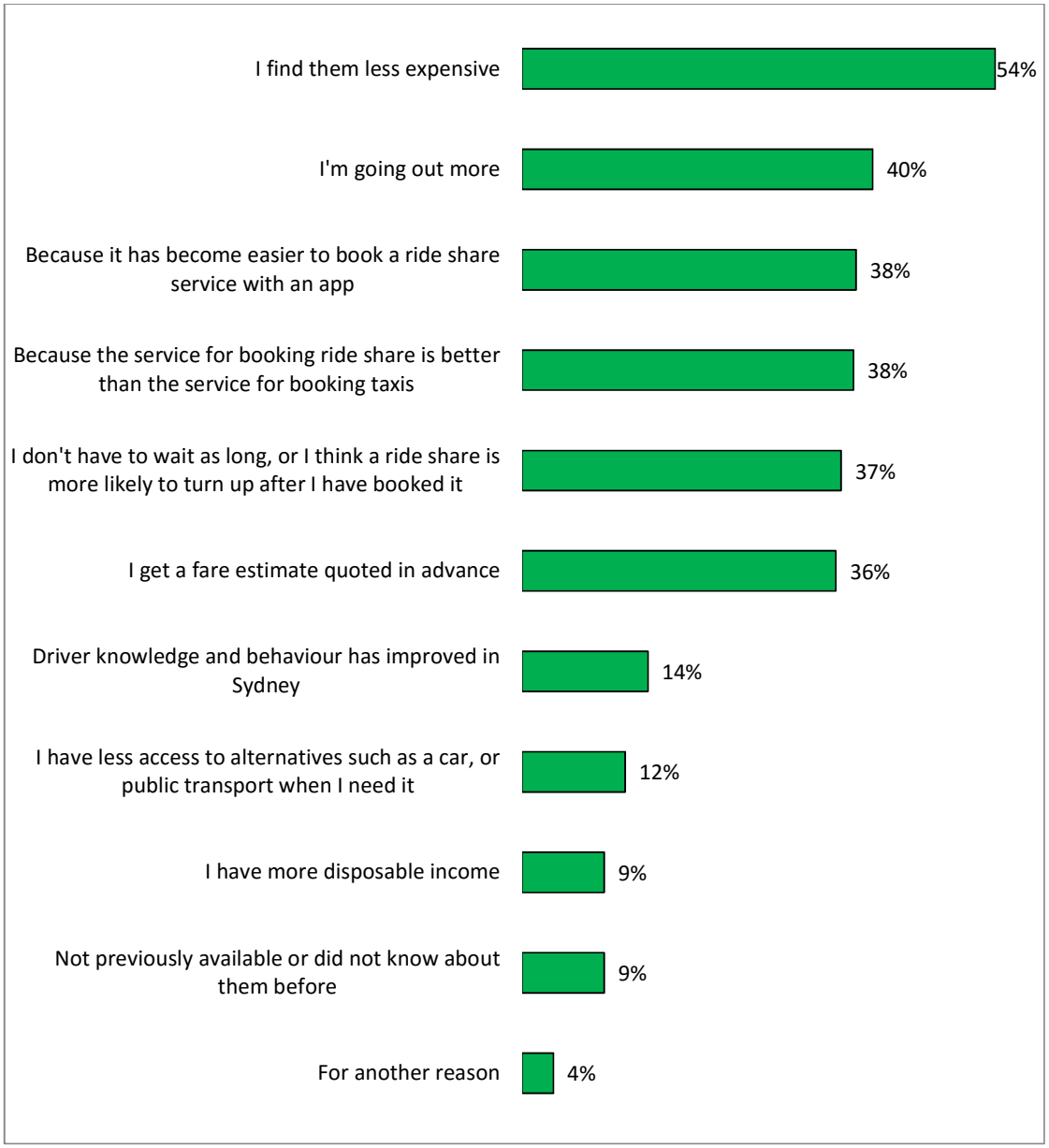
Q49b. Compared to the previous 12 months, in the last 12 months ….
I used ride share services more/ used ride share services less/ There has been no change in how often I used ride share services
Q2. Compared to the previous 12 months, in the last 12 months ….
I caught taxis more/ I caught taxis less/ There has been no change in how often I have caught taxis

Those reporting increased use of ride share services were given a list of reasons for increased use (see Figure 50).

The most commonly reason given is that ride share services are less expensive (54%). Going out more is endorsed the second most often (40%), followed closely by a number of features of ride share services (easier to book with an app, better booking service than for taxis, less likely to have a long wait or a booked service not turn up, and getting a fare estimate in advance – reasons endorsed by 36% to 38% of those making more use of ride share). Other reasons were much less often endorsed, including having more disposable income (17%), improved driver knowledge and behaviour (14%) less access to alternative modes of transport (12%) improved availability or awareness (9%).

The key reasons for ride share use are lower cost, and better service than can be obtained from taxis.

Figure 50. Reasons for increased frequency of ride share use – Urban Sydney 2016 (n=340)



Q49C. I used ride share services more frequently because …. (can choose more than one) …

When those who report making less use of ride share services are asked to choose reasons from a list, n=180 Urban Sydney residents responded. Their replies are summarised in Figure 51.

Reasons endorsed for reduced use of ride share services are quite scattered, with the most frequent reason endorsed by 26% (I am going out less). Reduced need, and reduced capacity (less disposable income, 22%) and switching back to

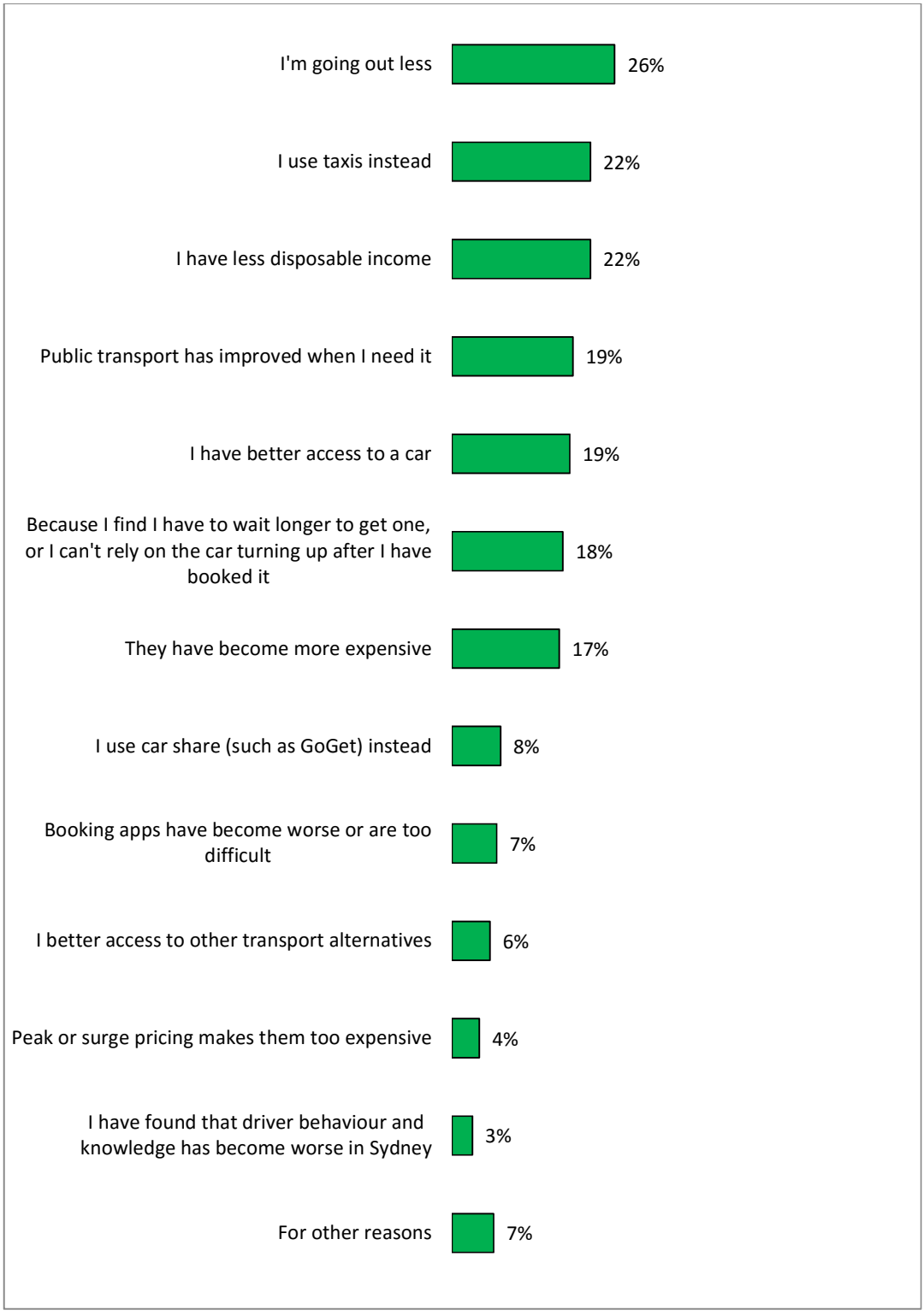
taxi use (22%) are followed by a number of other reasons endorsed by 17% to 19%. Becoming more expensive (17%) and the effects of peak or surge pricing (4%) are mentioned.

In summary, the reasons endorsed are a mix of reduced need or capacity, improved performance of alternatives and some doubts about the quality of service and concerns about cost. Unlike the reasons for increased use, there is no clear dominant reason or set of reasons for reduced use among the minority who report having cut back.

This contrasts with the reported reasons for less use of taxis by the n=486 who were asked about this. For taxis the reason most often given for reduced use was finding taxis more expensive (52%) followed by using ride share services (27%) or improvements to public transport (24%). Reduced need (going out less 28%, better access to a car, 18%), having less disposable income (18%), drivers overcharging and using longer routes than needed (15%) and poorer driver knowledge and behaviour (15%) accounted for most of the other reasons given (see Figure 18). Thus cost stands out much more strongly as a reason for reduced taxi use than it does for reduced ride share use.

These results further confirm that price sensitivity is a major determinant of the choice to use a taxi or take some other mode of transport.

Figure 51. Reasons for decreased frequency of ride share use – Urban Sydney 2016 (n=180)



Q49D. I used ride share services less frequently because …. (can choose more than one)

9.2. What would encourage increased use

While half the Urban Sydney sample (54%) said nothing would make them use ride share services more regularly, 46% endorsed triggers for more regular use (see Figure 52).

Fares becoming cheaper (21% of Urban Sydney respondents, 45% of those who did not reject all the reasons listed) is the clearly dominant motivator that respondents willing to make more use of ride share consider decisive.

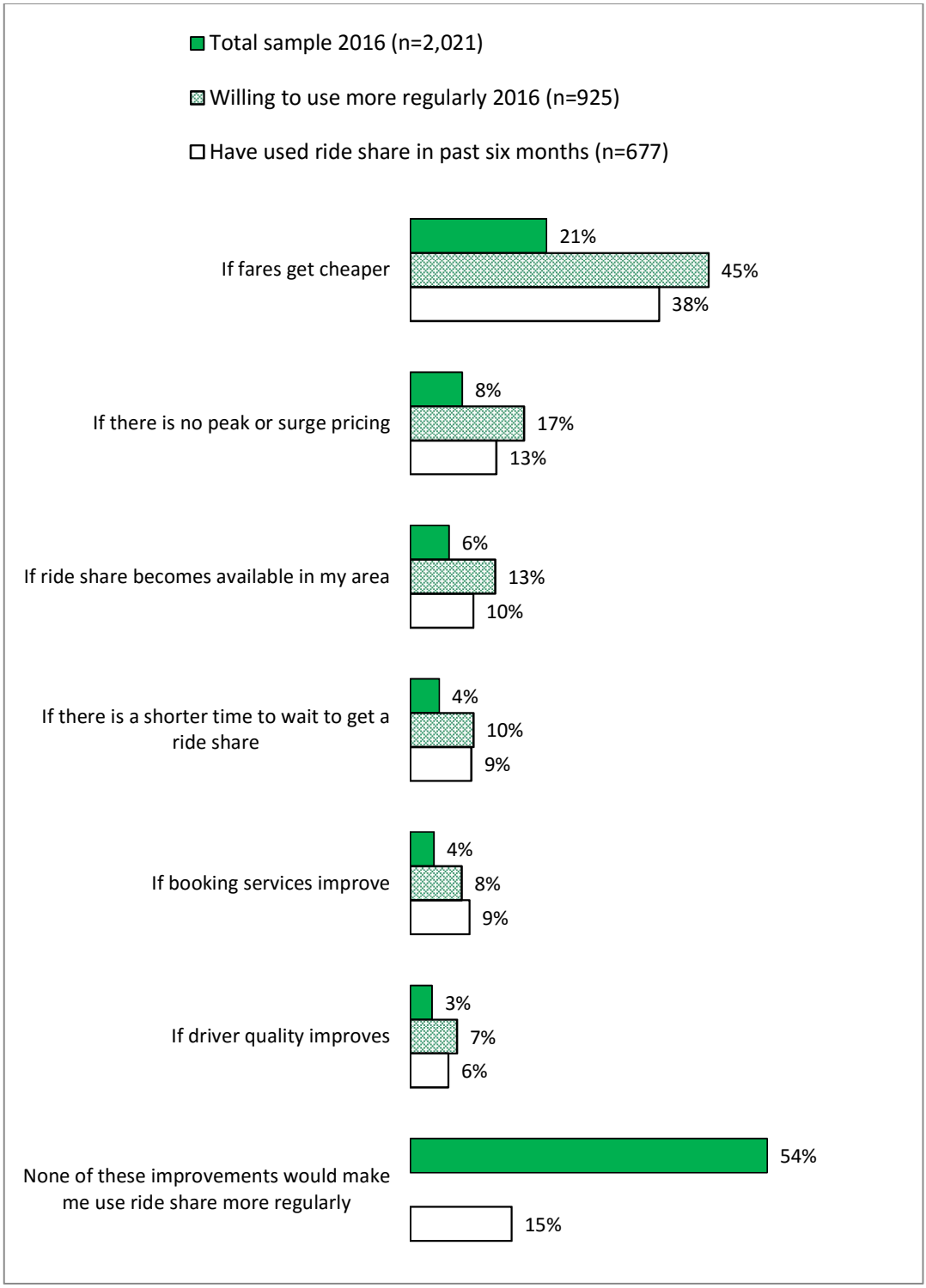
The end of peak or surge pricing was the next most often endorsed (8% of all urban Sydney respondents, 17% of those willing to consider more regular use). This confirms the strong role of prices in conscious reasons for choice of transport mode.

Becoming available in the respondent's area came next (6% of all, and 13% of those willing to consider more regular use).

The other reasons listed each account for 3% to 4% of all Urban Sydney respondents and 7% to 10% of those willing to consider more regular use.

The order of the endorsements remains the same if the sample is limited to those in Urban Sydney in 2016 who report having used ride share services in the past six months. Only 15% of those who have used ride share (compared to 74% of those who have not) indicated that none of the listed reasons would result in them making more regular use of ride share.

Figure 52. Most likely to increase ride share use in the next year – Urban Sydney 2016



Q49e. In the next 12 months, the thing that is most likely to get me to use ride share services more regularly is: (pick only 1)

9.3. Ride share value for money

Ride share users were asked whether they consider ride share services offer good value for money, and whether they offer good value for money when peak or surge pricing is NOT operating, and when it is operating. The results are summarised in Figure 53.

Ride share users are much more likely to view ride share services as offering good value for money (75% of Urban Sydney users) than taxi users are to consider taxis offer good value for money (28%).

When asked about the value for money of ride share services when peak or surge pricing is not operating, the percentage of users who consider value for money is good drops to 64%. It appears that even mentioning these practices reduces the proportion of users willing to say ride share services offer good value for money.

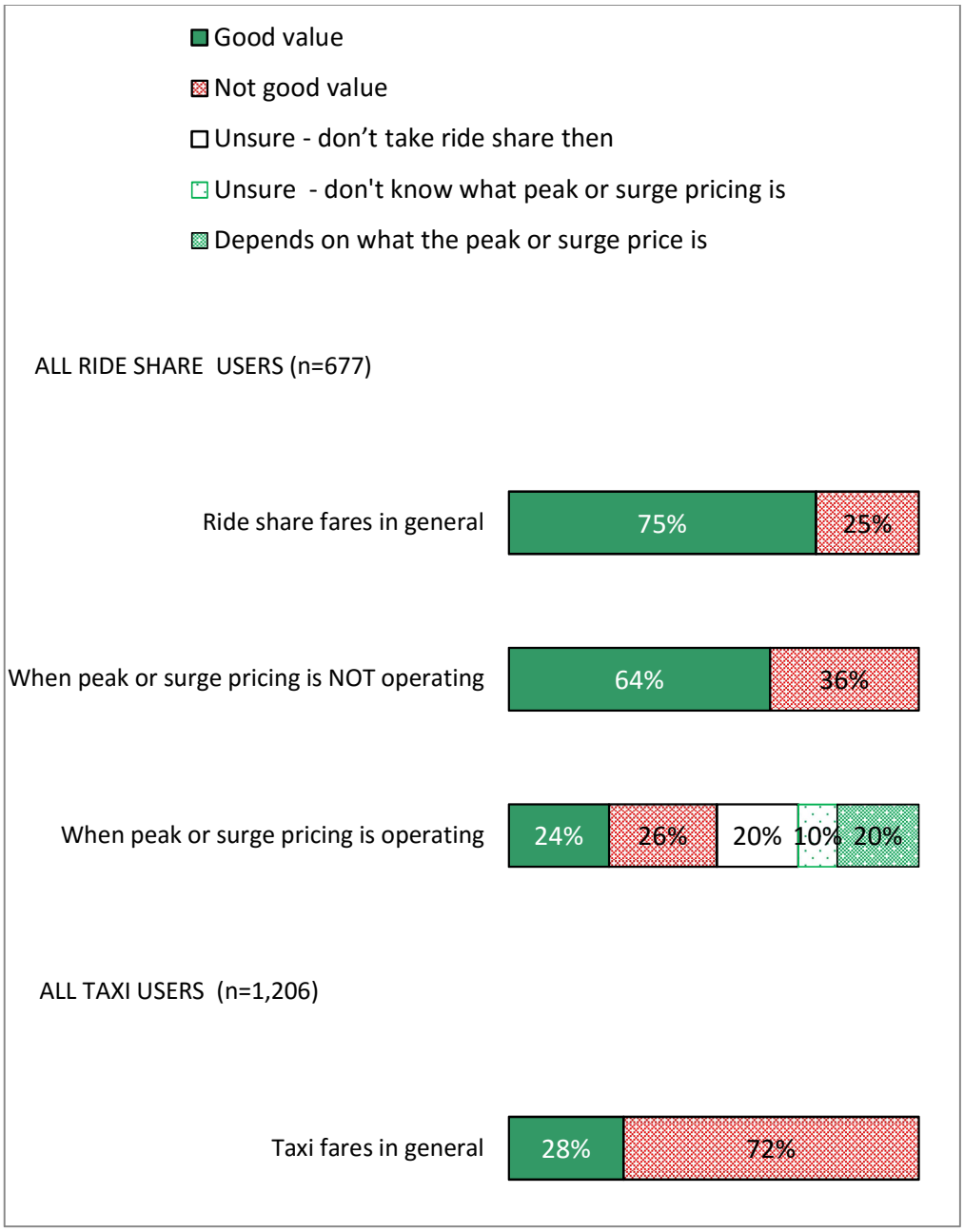
Only 24% of ride share users consider ride share services offer good value for money when peak or surge pricing is operating, and 26% consider it is not. Thus only 48% of those with a definite opinion consider ride share services are good value for money when peak or surge pricing is operating.

However, those without a definite opinion include users who never take ride share when peak or surge pricing is operating, and also those who do not know what peak or surge pricing is, as well as those who say the answer depends on what the peak or surge price is. As a percentage of those saying ride share is good value for money, or is not, or that it depend on the price, 34% consider ride share good value for money even when peak or surge pricing is operating, 28% say it depends on the actual price being charged, and 37% that ride share fares are not good value for money at these times.

Even when peak or surge pricing is operating for ride share services, ride share services are more likely to be considered good value for money by users than taxi services are to be considered good value for money. The finding is the same even if those saying it depends on the price are included and not treated as believing ride share at these times offers good value for money.

These results clearly support the importance of perceived value for money in the decision to use ride share services rather than taxis.

Figure 53. Value for money of ride share trips: Urban Sydney 2016



Q49F: Overall I think 1. Ride share fares are good value for money / 2. Ride share fares are not good value for money

Q49G Ride share fares when peak or surge pricing is NOT operating …

Q49H Ride share fares when peak or surge pricing IS operating …

9.4. Effect of ride share use on taxi use

We have already seen that those who use ride share services are more likely than others to use taxis and to do so more often. However, it would be expected that use of ride share services reduces the use of taxi service.

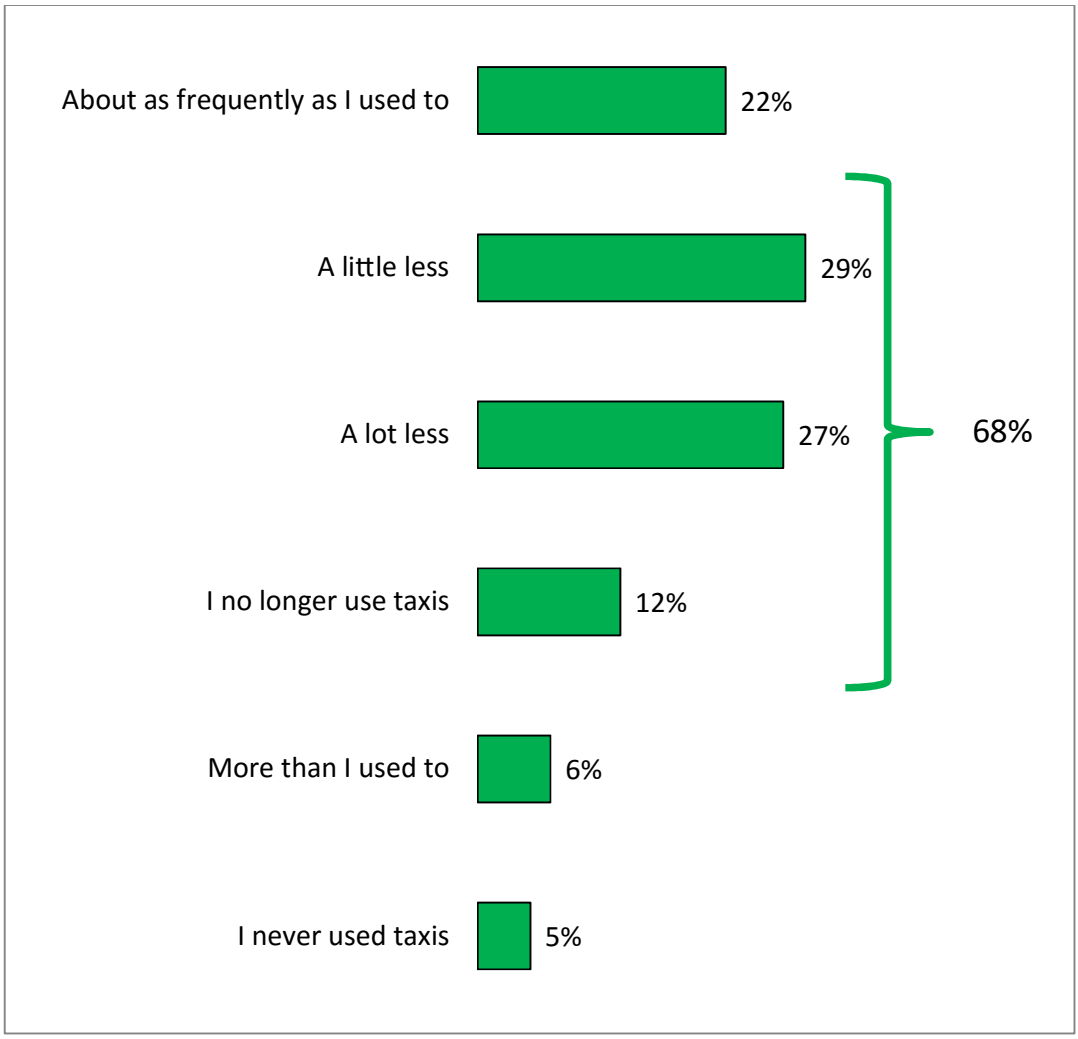
Thus, ride share users were asked what effect their use of ride share services has had on their use of taxi. Figure 54 summarises the replies.

Most ride share users (68%) believe using ride share services has stopped their use of taxis (12%) or reduced it either a little (29%) or a lot (27%). A few claim they never used taxis (5%). While 22% say their use of ride share has had no effect on their use of taxis, only 6% report it has increased their use of taxis.

To be more confident about the impact of ride share use on taxi use requires longitudinal data from a group that in an earlier period were only using taxis, and then examining both taxi and ride share use in a subsequent period when some had started use of ride share. People are not good at recalling the frequency of behaviour in an earlier period and comparing it to a more recent period.

However, it is clear that most ride share users believe that using ride share services has decreased their use of taxis, despite the quite strong relationship among users between the reported frequency of taxi use and the reported frequency of ride share use, and there being no reduction in the reported use of taxis overall, despite the sharp rise in use of ride share services.

Figure 54. Effect of ride share use on taxi use – Urban Sydney 2016 (n=677)



Q49i. As a result of using ride share, I use taxis …

9.5. Whether ride share waiting times are reasonable

Ride share users in 2016 were asked whether they considered the time taken to get a ride share at different combinations of time of day and day of week is reasonable. These questions parallel those asked for taxis. Figure 55 compares the Urban Sydney 2016 results for ride share to the results for taxis.

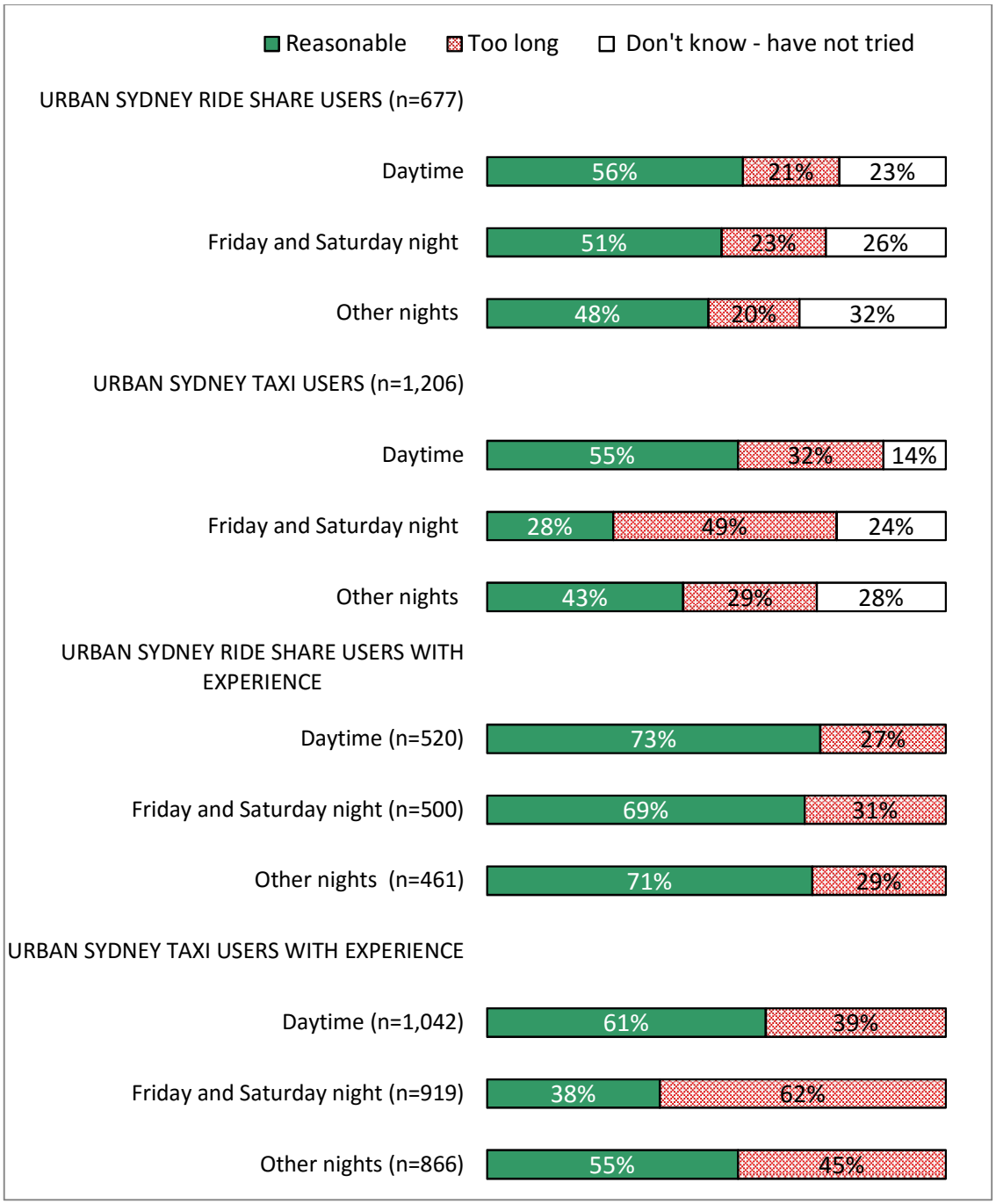
Among ride share users with who have used ride share in Urban Sydney at specified times and days, there is little variation between results for daytime, Friday and Saturday nights and other nights in the percentage who consider the time taken to get a ride share too long (27% to 31%).

For each specified period, among users with relevant experience, waiting times for getting a ride share are significantly more likely to be considered reasonable than waiting times for getting a taxi.

The differences are not as large for daytime (73% ride share, 61% taxis, 12 percentage points) or on nights other than Friday and Saturday (71% for ride share and 55% for taxis, 16 percentage points) as for Friday and Saturday nights (69% ride share, 38% for taxis, 31 percentage points). The larger effect on Friday and Saturday nights is due to the much lower percentage of taxi users with relevant experience who consider waiting times reasonable on Friday and Saturday nights (38%).

Thus one reason for use of ride share services rather than taxis is that users believe they will not have to wait as long for their ride to arrive, and especially so on the nights when obtaining a taxi is more widely expected to take too long.

Figure 55. Whether waiting times considered reasonable, Urban Sydney - 2016



Q. During the day, I think that the time taken to get .[Q10 a taxi] / [Q49L a ride share]

Q. On Friday and Saturday nights, I think that the time taken to get [Q11 a taxi] /[Q49J a ride share]

Q On Sunday to Thursday nights, I think that the time taken to get .[Q12 a taxi] / [Q49K a ride share] is …

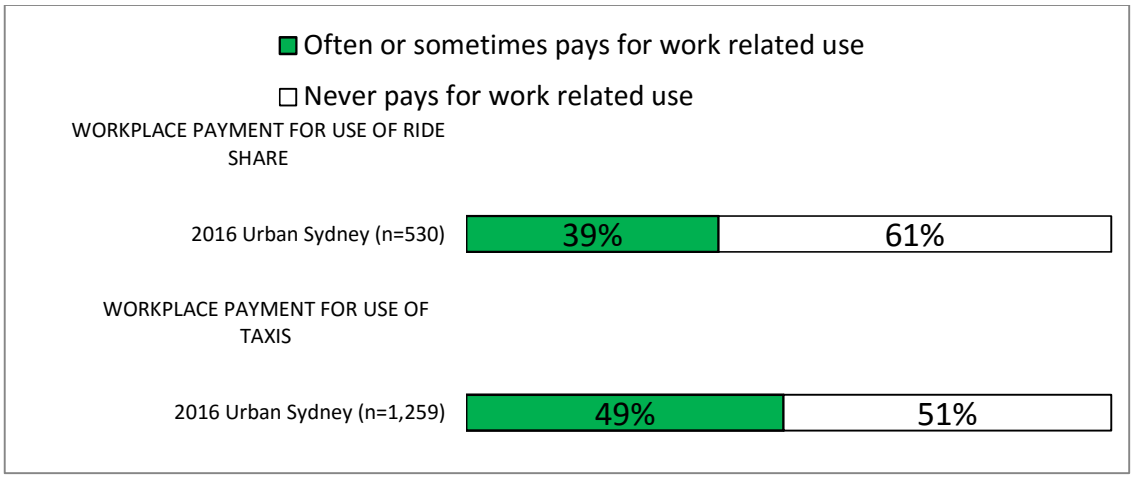
9.6. Employer policies about ride share services

Ride share users who work were asked whether their employer sometimes pays for use of ride share services when these are used for work purposes. Those who said their employer does sometimes pay for work-related use of ride share were then asked whether staff were allowed to use ride share services more frequently, less frequently or there had been no change compared to the previous twelve months. These questions parallel questions asked of employed taxi users.

In Urban Sydney in 2016, Figure 56 shows that 39% of the employed users of ride share services report their employer at least sometimes pays for use of ride share services. This is significantly lower than the percentage of employed taxi users who report their employer at least sometimes pays for work-related use of taxis (49%). Given the relatively recent development of ride share services, the difference (10 percentage points) is not large.

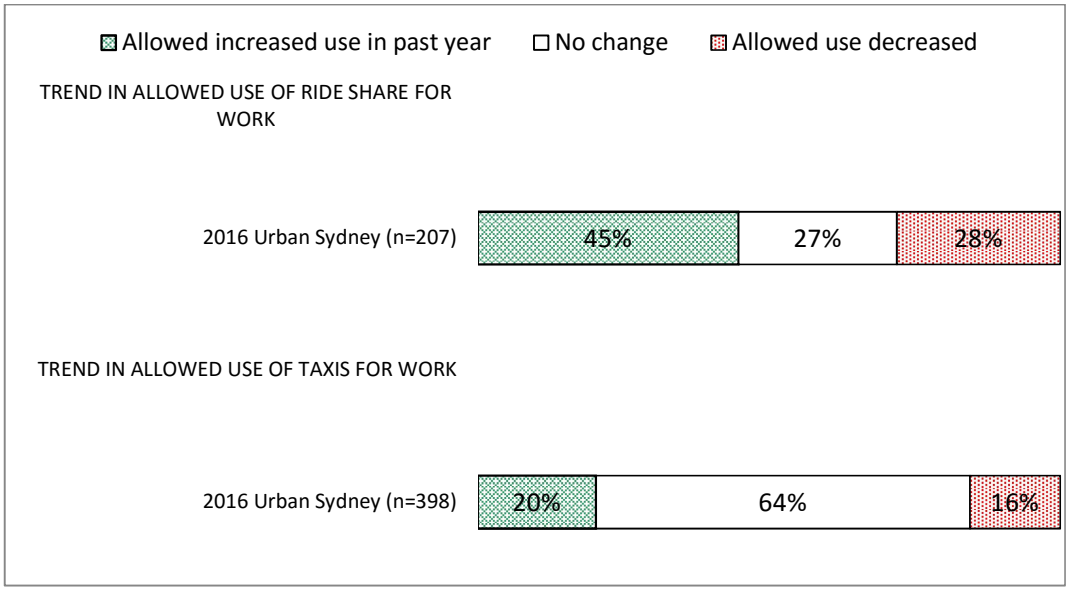
When those who report their employer does sometimes pay for work-related use of that service are asked whether the employer is more or less likely to pay, it appears that willingness to pay for work-related use of ride share services is much more likely to be increasing (45%) or decreasing (28%) than willingness to pay for taxi use (20% increasing and 16% decreasing – see Figure 57). Employer willingness to pay for work-related use of taxis appears to be more stable than willingness to pay for use of ride share.

Figure 56 Workplace ride share and taxi use policies, Urban Sydney - 2016



Q. My workplace …. Often or sometimes pays for staff to travel by [Q49m ride share/ Q2c taxi] for work related purposes / Never pays for staff to travel by [Q49m ride share/ Q2c taxi] for work related purposes
Base: Those in paid work using each service mode

Figure 57 Trend in workplace ride share use and taxi use policies Urban Sydney - 2016



Q49n/2d. In the last 12 months…. My employer allowed staff to catch [Q49n ride share/ Q2d taxi] more frequently compared to the previous 12 months / My employer allowed staff to catch [Q49n ride share/ Q2d taxi] less frequently compared to the previous 12 months / There has been no change to work [Q49n ride share/ Q2d taxi] travel policies that I know of
Base: Those where the employer at least sometimes pays for work-related use.

9.7. Reasons unable to use a ride share when tried

Within the Urban Sydney sample, of n=804 who either thought about using a ride share service and did not, or did use a ride share service (n=804), 21% report that they tried to obtain a ride share service but could not get one. This is close to the 18% of those who had either thought about using a taxi or had used one (n=1,350), who report they had tried to get a taxi but could not get one.

The Urban Sydney respondents who reported in 2016 that at least once in the past six months they had tried to use a ride share service and could not get one were asked the reason they could not.

Figure 58 shows the percentages giving each of the prompted replies.

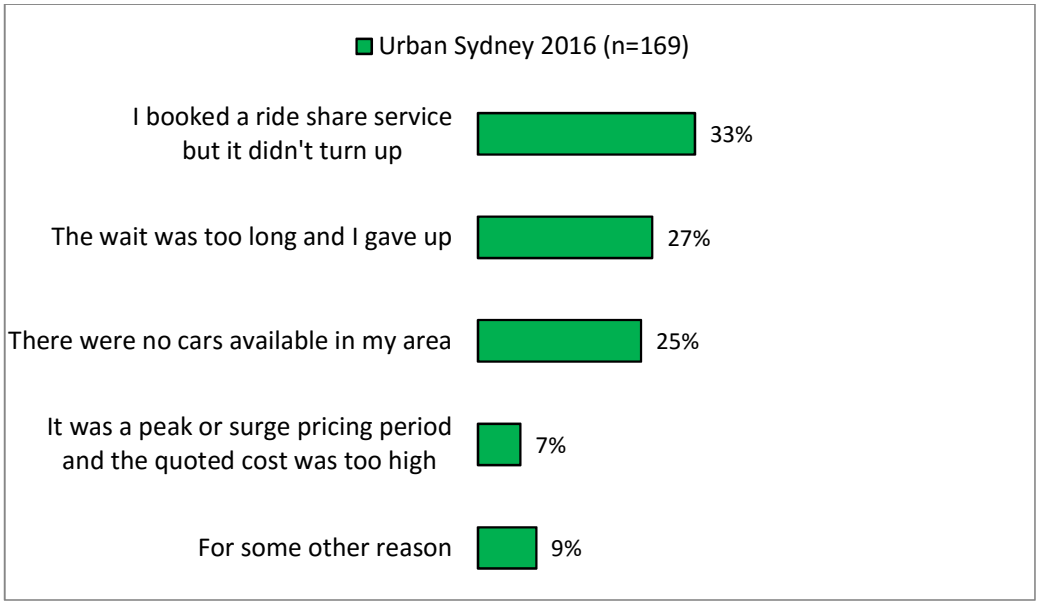
Three reasons dominate the responses, with failure to turn up being the most widely endorsed (33%), followed closely by giving up after a wait that was too long (27%) and there being no cars available in the respondent's area (25%).

Finding the cost quoted during a peak or surge pricing period too high was rarely given as the reason (7%) and a similar percentage had some other reason not listed (9%).

Reasons endorsed by those who had tried and failed to get a taxi include 29% reporting failure to turn up. The other explanations are not comparable.

Thus, both failure to get the service sought and failure of the service to turn up is about equally common for taxis (18% unable to get, 29% not turning up) and for ride share services (21% unable to get, 33% not turning up) and certainly no less common for ride share services than for taxis.

Figure 58. Reasons did not use a ride share when tried to do so Urban Sydney - 2016



Q33RSa The last time I did not use a ride share service although I tried to, I did something else because …[TRIED AND WAS UNABLE TO GET A RIDE SHARE AT Q31RS]

9.8. Reasons did not use a ride share service

Those who reported they had thought about taking a ride share service and decided to do something else were asked which of the reasons shown in Figure 59 decided them to not do so.

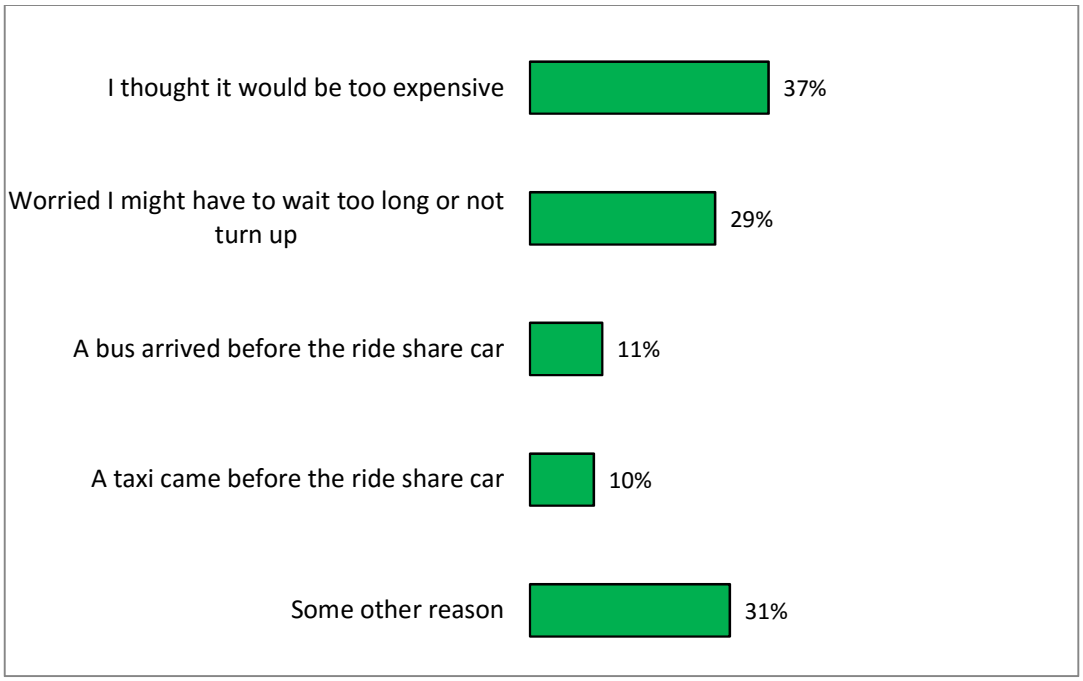
Believing it would prove too expensive is endorsed most often (37% - but well below the 68% for taxis), followed by being worried that the wait might be too long or the car not turn up (29% - also well below the 40% for taxis).

Taking a bus (11%) or taxi (10%) that came before the booked ride share arrived are less common reasons.

Almost one in three indicate they had some other reason not listed (31%). In future surveys it could be worth asking those giving this reply to indicate their reason verbatim to other common explanations not listed.

These results add further evidence that cost is a major issue influencing use of paid point to point transport.

Figure 59. Reasons decided to not use a ride share service Urban Sydney - 2016



Q33RSb The last time I did not use a ride share service although I thought about it, I decided not to because …
Base: Thought about using a ride share service but then decided to do something different at Q31RS, n=303

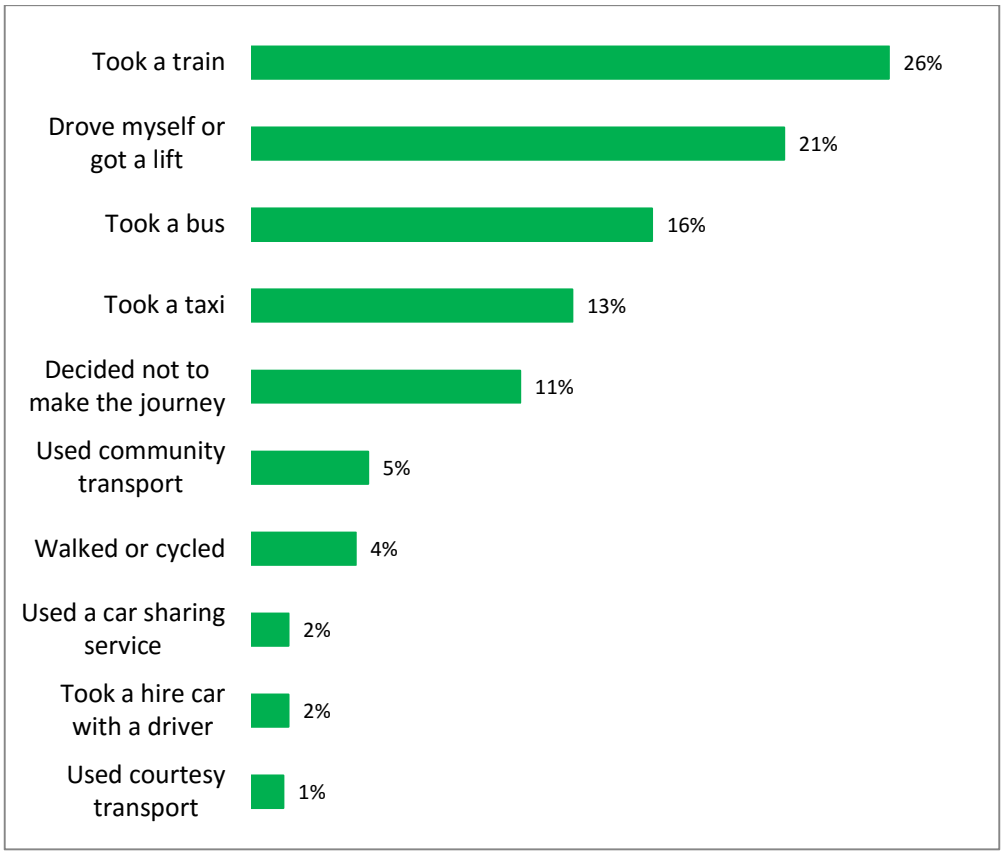
9.9. Action taken instead

A substantial segment in Urban Sydney in 2016 recalled having considered using a ride share service in the past six months and deciding in the end to do something different or being unable to get one (23% of all Urban Sydney respondents).

Figure 60 shows that most (89%) still took the intended trip. This is also true for those who thought about or tried to take a taxi and then did not do so.

The alternative adopted is typically taking a train, driving or taking a bus (63% in total), with some taking a taxi (13%). Other alternatives listed are each endorsed by 5% or fewer of those asked. These are similar to the alternatives used by those who thought about taking a taxi and in the end did not do so.

Figure 60. Action taken instead of using a ride share service Urban Sydney 2016



Q32RS The last time I tried to use a ride share service or thought about using one and in the end did not, I …
Base: Those who said "I thought about using a ride share service but then decided to do something different" PLUS those who had been "unable to get one" in Q31RS - total n=472

9.10. Problems with ride share services

Just over one in four (27%) of those in Urban Sydney in 2016 who report having used a ride share service in the past six months report they have had a problem in the past twelve months when using such services or when trying to get one.

This is well below the 37% of those who have used a taxi in the past six months who indicate they have experienced a problem in the past twelve months when using or trying to get a taxi.

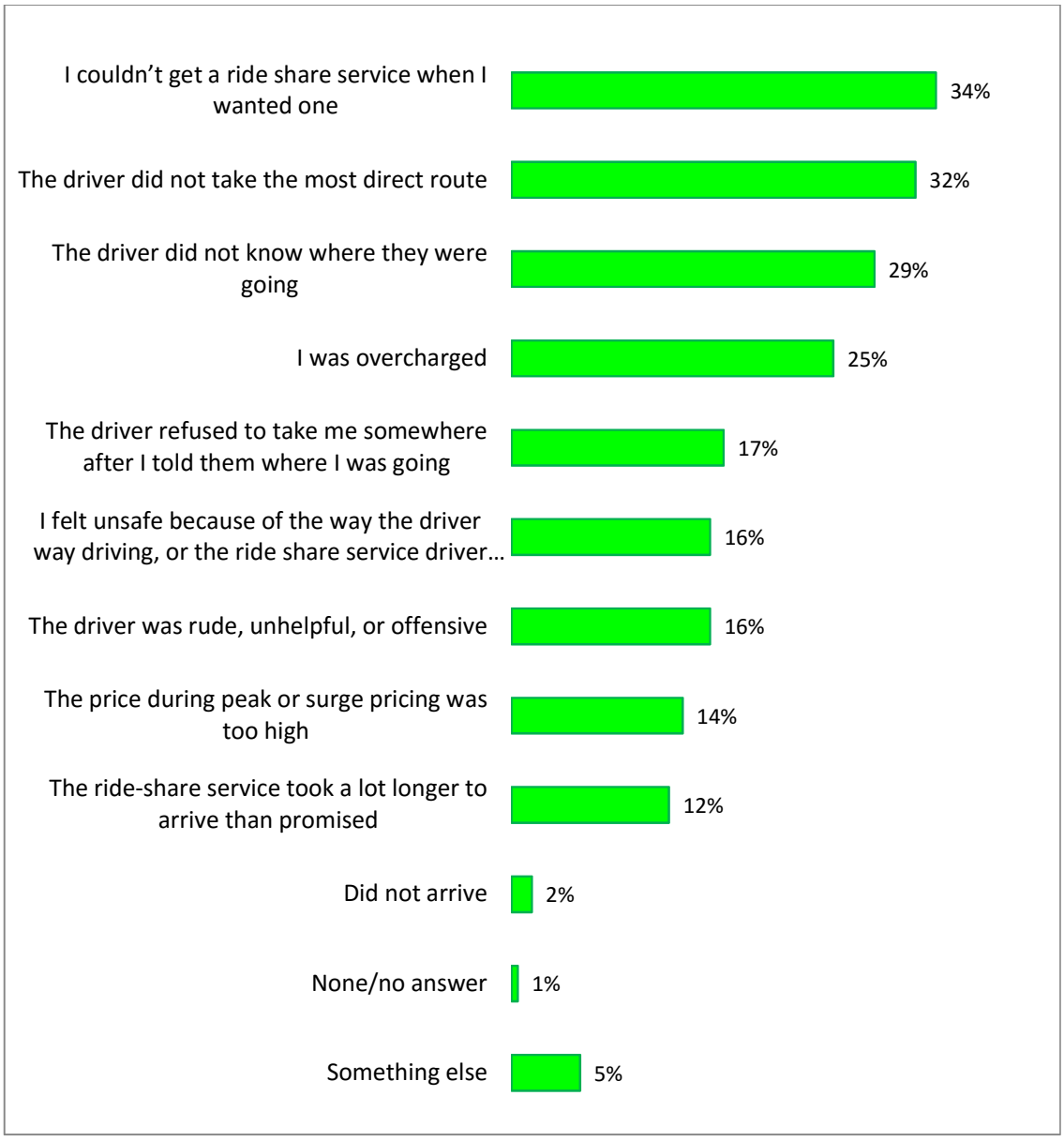
Those who indicate they have had a problem with a ride share service were asked to indicate the nature of the problem by endorsing all the options that apply from a list of nine problems. If the respondent indicated there was something else, they were asked to describe this in their own words.

The most common problems are being unable to get a ride share service when one was wanted (34%) closely followed by drivers not taking the most direct route (32%), not knowing where they were going (29%), or being overcharged (25%). These are the same problems that form the top four for taxis, but each one is reported by fewer of those ride share users who have had a problem than by taxi users who have had a problem. This means that ride share users are less likely to report multiple problems.

Problems with the fare being too high were not mentioned, although some report being overcharged. The price being too high due to peak or surge pricing was endorsed by only 14% of those with a problem, (4% of all Urban Sydney ride share users asked).

The percentage reporting each type of problem listed, plus those who volunteered that the driver did not arrive (including drivers who went to the wrong location) or gave no details can be found in Figure 61.

Figure 61. Problems experienced with ride share use, Urban Sydney 2016 (n=185)



Q40a Problems I have experienced in the last 12 months include: (can choose more than one) with verbatim "other" replies coded.

10. Most recent ride share trip

All respondents who had used a ride share service and not used a taxi in the past six months (n=52) plus a random selection of around 30% of those who had used both (n=193 of n=625 who had used both) were asked a series of questions about their most recent ride share trip. The total sample asked about their last ride share trip was thus n=246.

The questions asked paralleled the questions asked about the most recent taxi trip.

10.1. Ride share trip purpose

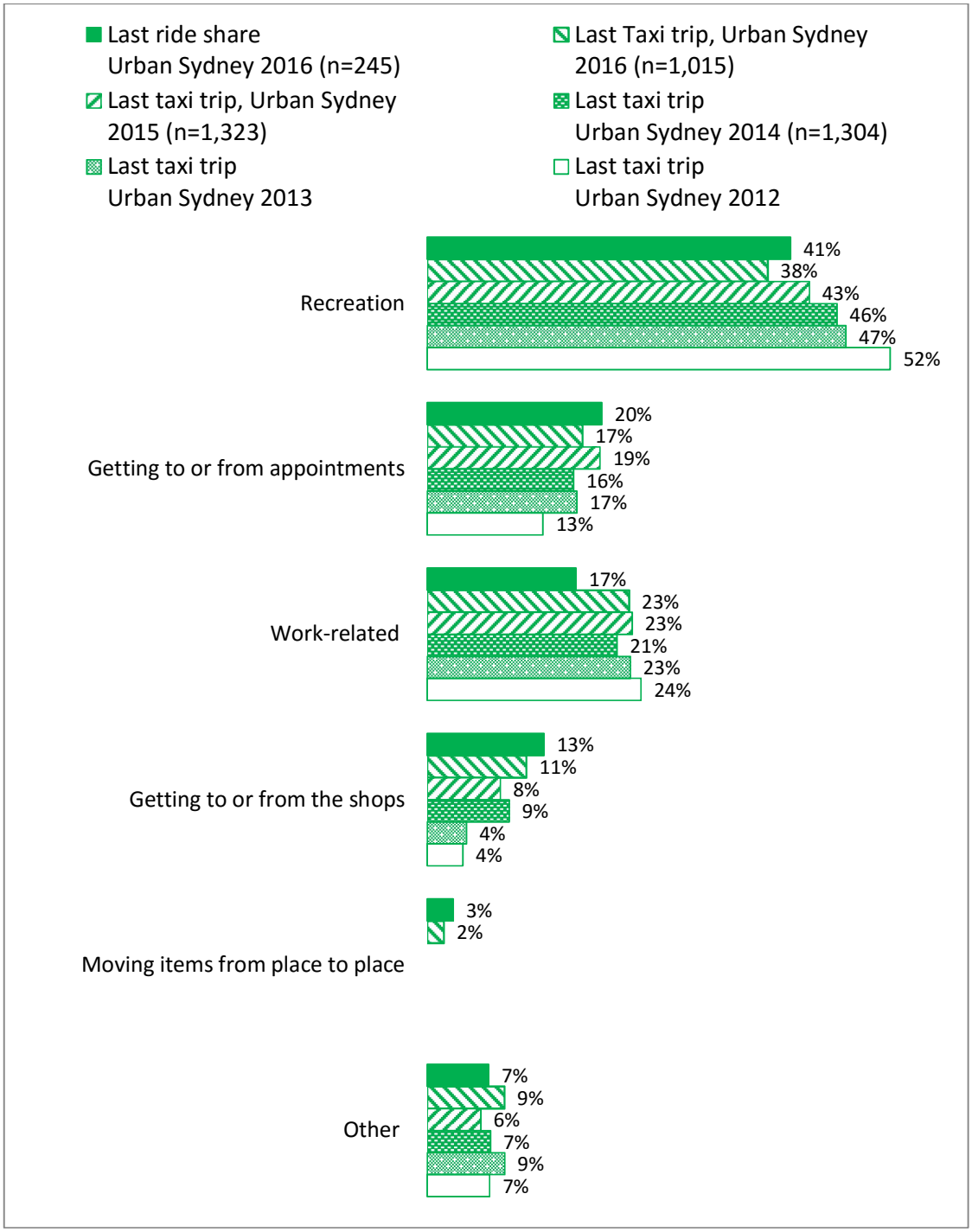
Recreation is the reason most often chosen (41%) from the prompted options offered for Urban Sydney in 2016 (see Figure 62). This is quite similar to the result for the purpose of the last Urban Sydney taxi trip in 2016 and 2015 (38% to 43%).

Getting to and from appointments account for some trips in Urban Sydney (20%) and work related trips (17%) come next followed by getting to and from shops (13%).

Moving items from place to place was only endorsed by 3%. Only 7% indicated they had some other reason not listed.

While the order is slightly different, the results are very similar to those for the last taxi trip taken in 2016 and also in 2015.

Figure 62. Purpose of last ride share trip – Urban Sydney 2016



Q20[RS] My main purpose in taking my most recent [ride share / taxi] trip in Sydney was Work-related (including getting home from work)
Getting to or from appointments / Getting to or from the shops / Recreation (such as entertainment, social visits, 'going out', including getting back home) / [2016 ONLY] Moving items from place to place Other (such as education related)

10.2. Reason for using ride share

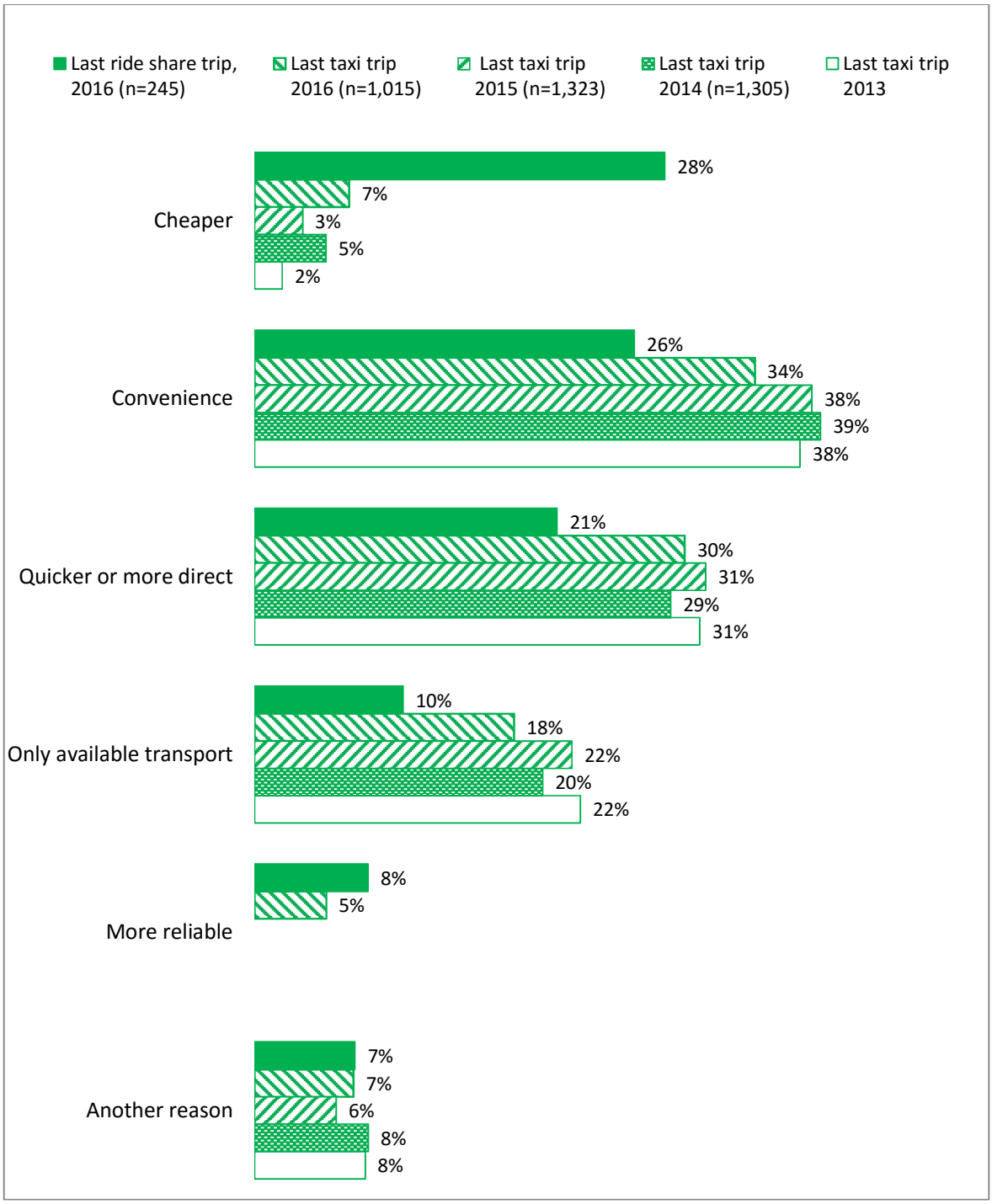
In Urban Sydney (see Figure 63), ride share use is most often attributed to being cheaper than the alternatives (28%) followed closely by convenience (26%). Being quicker or more direct than other transport comes third (21%). Some believe using a ride share service is their only option (10%) or is more reliable (8%).

The outstanding difference from the 2016 and previous survey results for the last taxi trip in Urban Sydney is the priority given to being cheaper than alternatives: only 2% to 7% endorsed this reason for the last taxi trip, compared to 28% for the last ride share trip. Given the reduction in endorsements of other reasons that follows from the strong endorsement of being cheaper, the priority of other reasons is quite similar for ride share and taxis.

It is interesting that despite the relatively widespread endorsement of being cheaper as the main reason for using ride share, two other reasons (convenience and being quicker or more direct) were endorsed almost as often. Thus while being cheaper is a strong conscious reason for ride share use, the mode is seen by substantial minorities as more convenient or quicker than using alternatives such as a taxi.

Thus, it appears that the cost of trips by ride share are lower than the cost of taxi trips covering a similar distance, but the difference is perhaps smaller than might be expected.

Figure 63. Reason for using ride share compared to reason for using a taxi – Urban Sydney



Q21[RS] The main reason I took a [ride share / taxi] instead of other transport options was … Convenience (for example, I didn't have to worry about parking, I had luggage, I didn't want to get wet) / Taxi was quicker or more direct / Taxi was cheaper / I didn't have access to any other transport options / Another reason

10.3. Obtaining the ride share

How ride share was booked

Ride share trips are always booked using an app. The majority of those asked about their most recent ride share trip used the Uber or UberX app to book the trip (78%), followed by GoCatch Go Car (9%) and Go Buggy (5%). Another 9% used some other app.

Waiting time

Over 80% of those who booked the next available car (n=175) had to wait less than 10 minutes, and 31% waited less than five minutes for the booked car to arrive. Only 2% waited 20 minutes or more.

For those who booked a car for a particular time (n=70), 50% reported the car arrived on time, and 17% that it was less than five minutes late, and 13% that it was five to under 10 minutes late. Thus waiting less than five minutes (67%) and less than 10 minutes (80%) was as common or even more common than among those who booked the next available. There was much less difference in waiting time between booking for a time and booking the next available than has been found for taxis. Those who booked the next available car were much less likely than those booking the next available taxi to have to wait more than 10 minutes (20% for ride share, 46% for taxis).

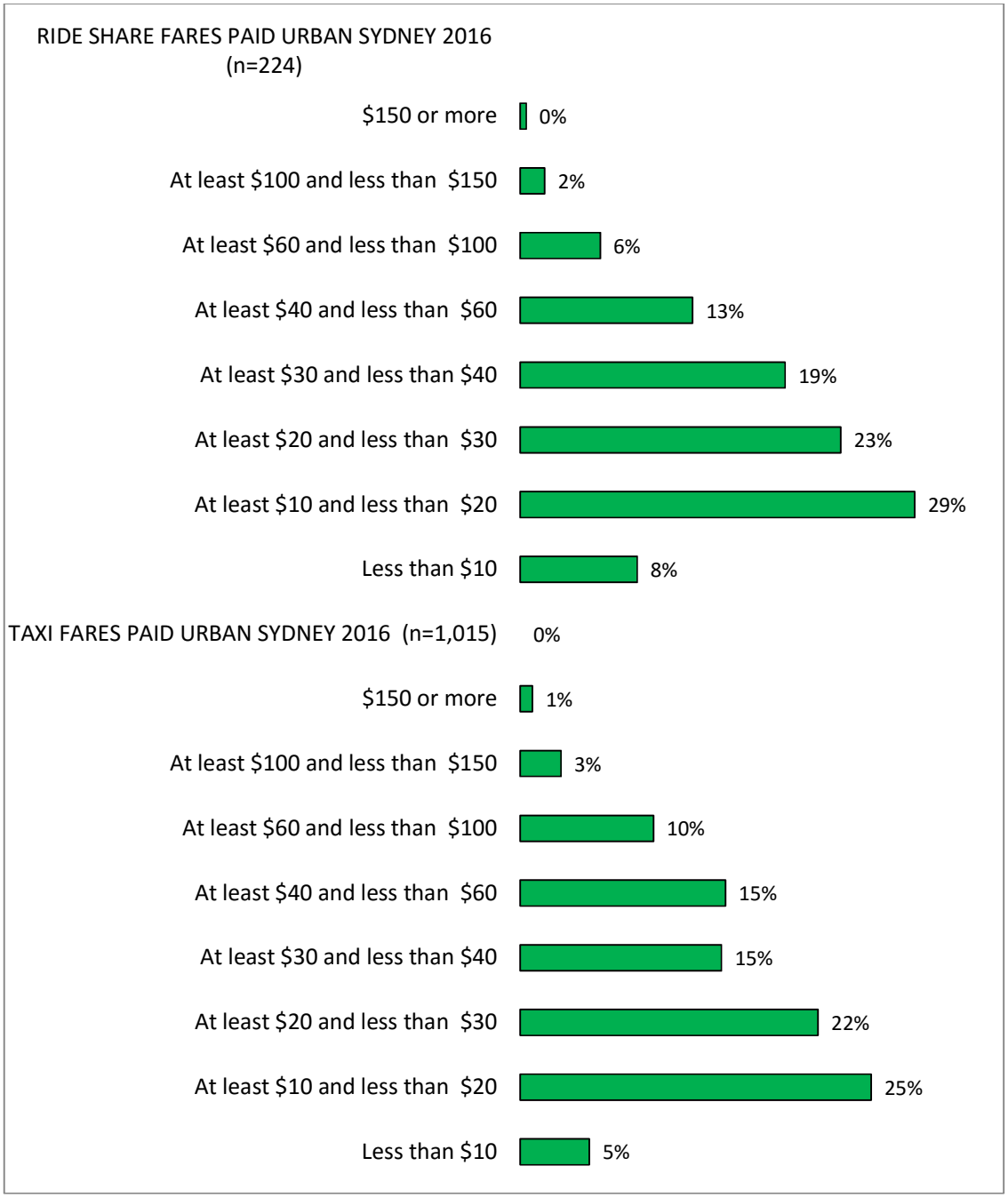
Satisfaction with the time taken to obtain the ride was relatively high with 19% very satisfied and 59% either satisfied or very satisfied. Only 19% were dissatisfied. This indicates considerably higher satisfaction than the equivalent item asked about waiting time for taxis (16% very satisfied, 50% v=satisfied or very satisfied and 33% dissatisfied). The difference is probably due to the lower overall waiting times especially for those who booked the next available car.

10.4. Paying for ride share

Fare paid

The median cost of the last ride share trip in Urban Sydney (Q26RS) was about $34, compared to $28 for the last taxi trip (Q26). The distributions of fares paid are compared in Figure 64.

Figure 64. Amount paid on last ride share and taxi trip by location – Urban Sydney 2016



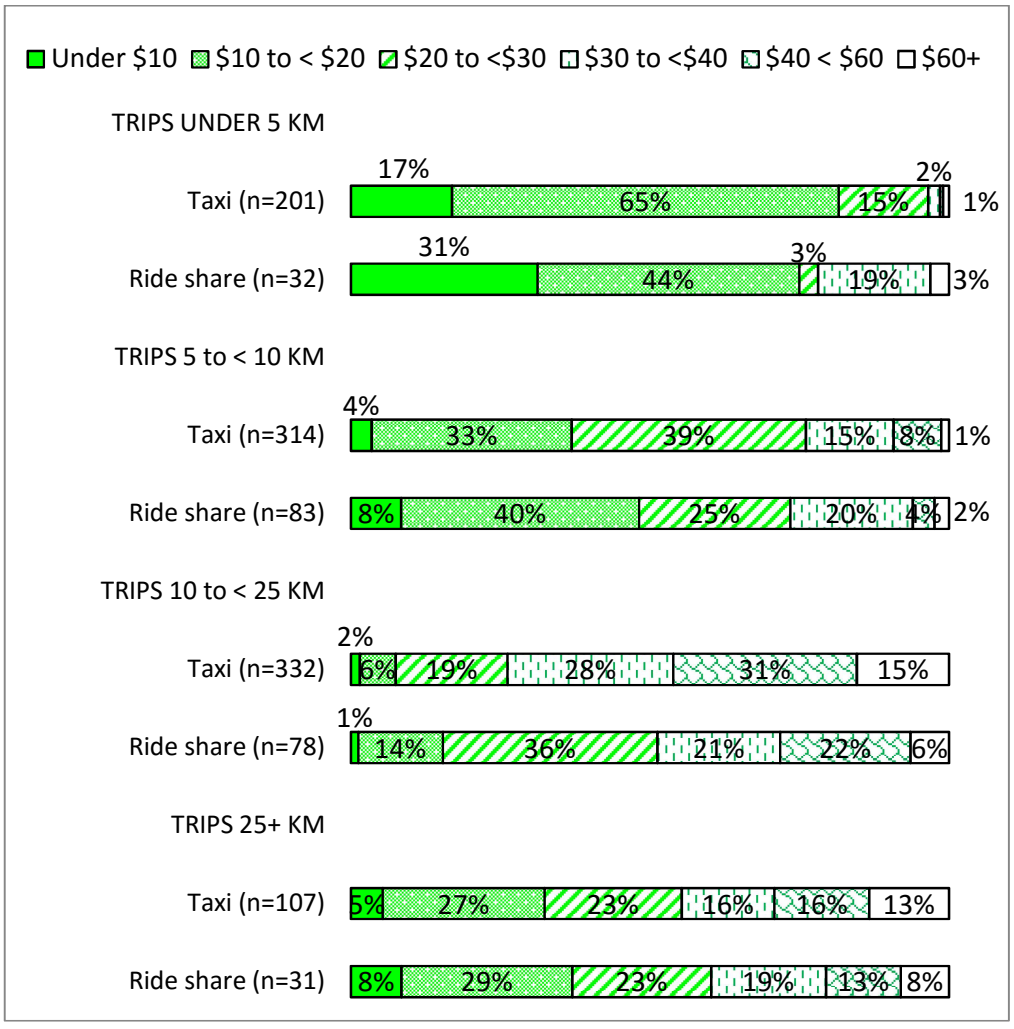
Q26/Q26RS The fare, including any service fee for electronic payment, was …

Comparison of fares paid within bands of distance travel are shown in Figure 65. The results show that, for all but one distance range (5 to under 10 km), taxi fares paid tend to be higher than ride share fares paid for the same distance band. For 5 to under 10km trips, fares of less than $20 were more

common for ride share (48%) than taxi (37%) but fares of $20 to under $30 were less common for ride share trips (25%) than taxi trips (39%). Fares above $30 were about equally common (24% for taxi trips and 26% for ride share trips).

Thus, the belief among ride share users that ride share is cheaper than taxis for a similar distance trip is supported by the experience of our samples in Urban Sydney.

Figure 65. Fare paid by distance travelled for ride share and taxi trips – Urban Sydney 2016



Taxis: Q26, Ride share Q26RS.The fare, including any fee for electronic payment, was …
by Taxis Q16 / Ride share Q16RS My most recent taxi/ride share trip was …

Who paid

For both the most recent ride share trip and the most recent taxi trip, the fare was most often paid by the respondent personally (ride share 54%, taxi 65%) or split with someone else (ride share 18%, taxi 9%). Payment by the employer (11% and 14%) or the respondent's own business (5% and 4%) came next. Payment by a client was rare (2% and 1%), and some fares were paid by someone else not listed (10% and 7%).

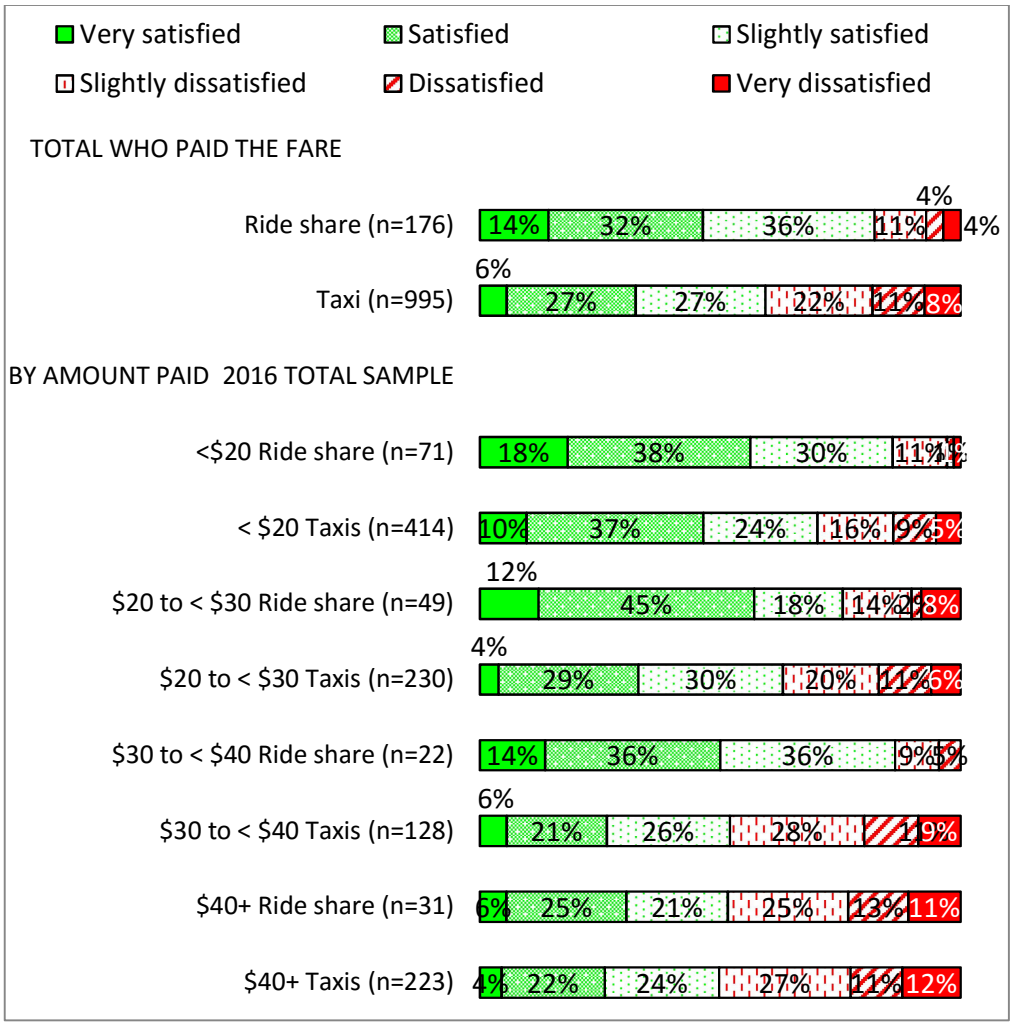
Satisfaction with the fare paid

Overall, those who were asked about their last ride share trip and paid the fare were more satisfied and less likely to be dissatisfied with the fare paid than those asked about the fare they paid for their last taxi trip (see Figure 66).

As with taxi fares, dissatisfaction tended to be higher for higher fares although the pattern is not completely consistent perhaps due to the smaller samples paying higher fares.

For fares under $40 those rating the fare paid for a ride share trip tended to be less dissatisfied than those paying for a taxi trip. For fares of $40 or more there was little difference with 48% of those paying $40 or more for a ride share trip and 50% of those paying $40 or more for a taxi trip being dissatisfied.

Figure 66. Satisfaction with ride share fare paid by amount paid – Urban Sydney 2016



Taxis: Q29. For the amount I paid for this trip, I was ….
Ride share Q29RS

11. Car share and hire car services

Chapter 4 discusses who uses car share and hire car services. This section describes the use of car share and hire car services in some more detail, beyond the prevalence (see Figure 10) and frequency of use (see Figure 11).

11.1. Use of car share services

As already seen, use of car sharing services is growing, but not as quickly as use of ride share services.

The additional items cover:

- The reported trend in use (increased, decreased or not changed from previous 12 months)
- Reasons for using more or for using less
- Which of a list of possible reasons would persuade users to make more regular use of car share services
- Whether car share prices are good value for money
- Whether able to get a car share when one is wanted
- Characteristics of the last car share trip taken, including origin, destination, time of day, day of week distance covered and reason for use, the cost of the trip and satisfaction with the cost

Perceived Trend in car share use

All respondents were asked whether in the last 12 months, they used car share services more, the same or less than in the previous 12 months.

Most respondents indicate there has been no change in their use of car share services, perhaps because most have not made use of such services. Making increased use and making decreased use is about equally often reported (both 9% in urban Sydney, 3% or 4% in Other Urban).

The even balance between increased and decreased use is also evident among those who report they have used a car share service in the past six months, with 30% of users in Urban Sydney giving each reply, and 24% among Other Urban users.

The most common reason for making increased use is finding the services less expensive than before (42% of those in Urban Sydney increasing use).

Other reasons that account for the bulk of the other explanations endorsed are:

- Knowing the car will be available when it is booked (29%)
- The booking service being better than the booking service for taxis (29%)
- Going out more (22%)
- Having more disposable income (20%)
- Knowing in advance what the cost will be (20%)
- Having less access to alternatives when transport is needed (18%)
- Booking with an app having become easier (16%).

The reasons for decreased use endorsed from the list provided to those who report reduced use are led by going out less (28% in Urban Sydney), followed by:

- Having less disposable income (23%), having better access to a car (22%)
- Improvements to public transport (19%)
- The available cars being too far away or being unable to rely on a car being at the pick up point when needed is endorsed by 15%
- Some say (15%) they are using taxis instead (but there is no indication of why this choice is being made).
- Becoming more expensive (10%), switching to ride share (6%), better access to alternative forms of transport (6%) and problems with the booking app (2%) are also mentioned, but each by only a few.

Most likely to increase use

When asked what is most likely to get them to use car share more regularly, the most common answer in all regions is that none of the listed improvements would do so (64% in Urban Sydney, 75% in both Other Urban and in Country towns).

Becoming available was not endorsed by any of the Urban Sydney respondents, but was endorsed by 8% of Other Urban, and 17% of Country respondents.

Urban Sydney car share users are much less likely to say nothing would persuade them to use car share services more (17%) than non-users (78%).

The Urban Sydney users were most likely to endorse getting cheaper (39%), followed by improved booking services (25%) and being located closer to them (19%).

Car share value for money

In Urban Sydney, 60% of car share users consider car share prices are good value for money (but 40% do not). Thus car share services are between taxi services and ride share services in being seen as offering good value for money.

Accessibility

Urban Sydney car share users asked whether they were able to get a car share the last time they wanted one were twice as likely to say yes (68%) as no (32%).

Length of last trip

Most Urban Sydney car share users report that their last trip was under 10 kms (52%) or 10 to under 25 kms (35%), accounting for 86% of the users. Relatively few drove the car share vehicle more than 25 Kms (14%, only 4% 50 kms or more), and 17% went less than 5 kms. The distribution of distance covered was very similar to the results for both ride share and taxis.

Main purpose of most recent car share trip

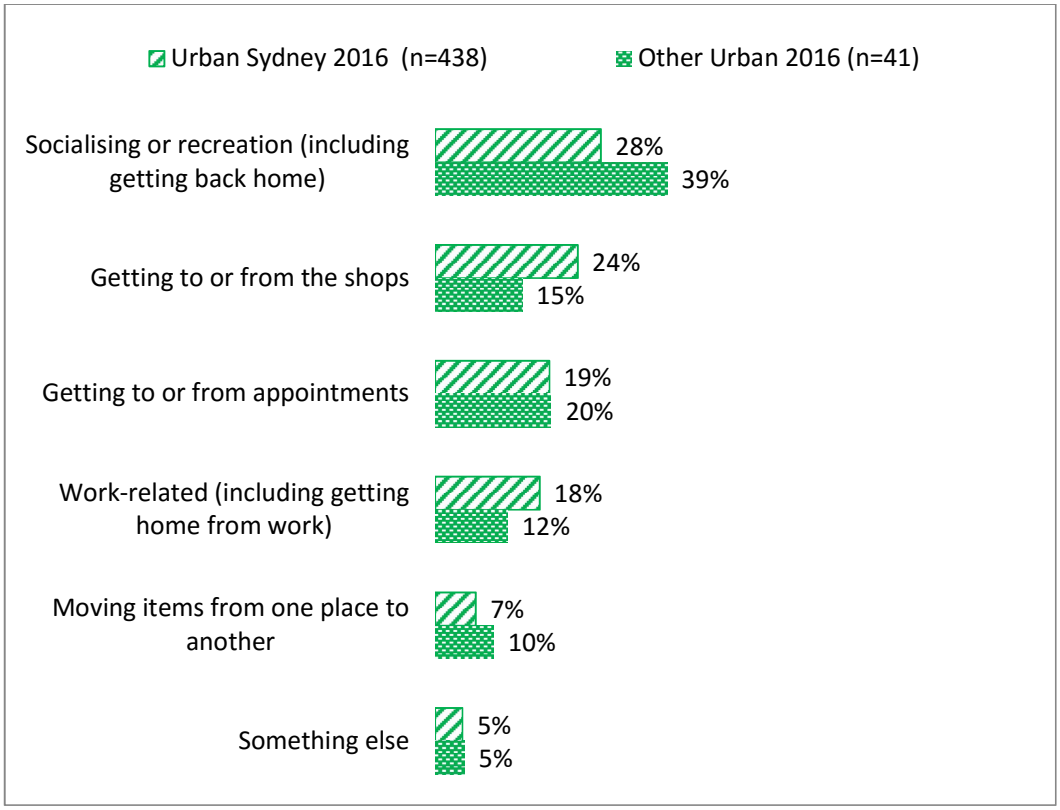
The most widely endorsed main reason for use of a car share service on the most recent car share trip was to socialise or for recreation, especially in Other Urban locations (see Figure 67). This was also the purpose most often endorsed by the n=14 Country residents who claimed to have used a car share service.

Getting to and from shops and getting to and from appointments came next, with some saying use was work-related (including getting home from work).

Moving items from place to place is the main reason for 10% or less.

Thus the mix of purposes is very similar to that found for ride share and for taxi use.

Figure 67 Main purpose of most recent car share trip by location - 2016



Q48I My main purpose in taking my most recent car share trip in [LOCALITY] was …
NOTE: Treat with caution where n<50. Where n<20, result not shown.

Cost of most recent car share trip

The median cost of the last Urban Sydney car share trip was around $35, with a very wide range from under $10 (6%) to $150 or more (2%). Over half (56%) reported the trip cost at least $20 and less than $60.

Most Urban Sydney users (75%) are at least slightly satisfied with the cost of the trip (40% being satisfied or very satisfied). Only 6% are dissatisfied (3%) or very dissatisfied (3%).

The Urban Sydney car share users are less likely to be satisfied or very satisfied with the cost of the last trip (40%) than ride share users (52%), but both are more likely to be satisfied or very satisfied than taxi users (32%).

Both car share users (6%) and ride share users (7%) are much less likely than taxi users (32%) to be dissatisfied or very dissatisfied with the cost of the most recent trip.

Users see car share (and even more ride share) services as having a marked cost advantage over taxis, with this being a major driver of choosing the new point to point modes over taking a taxi, and producing much greater satisfaction with the cost of trips.

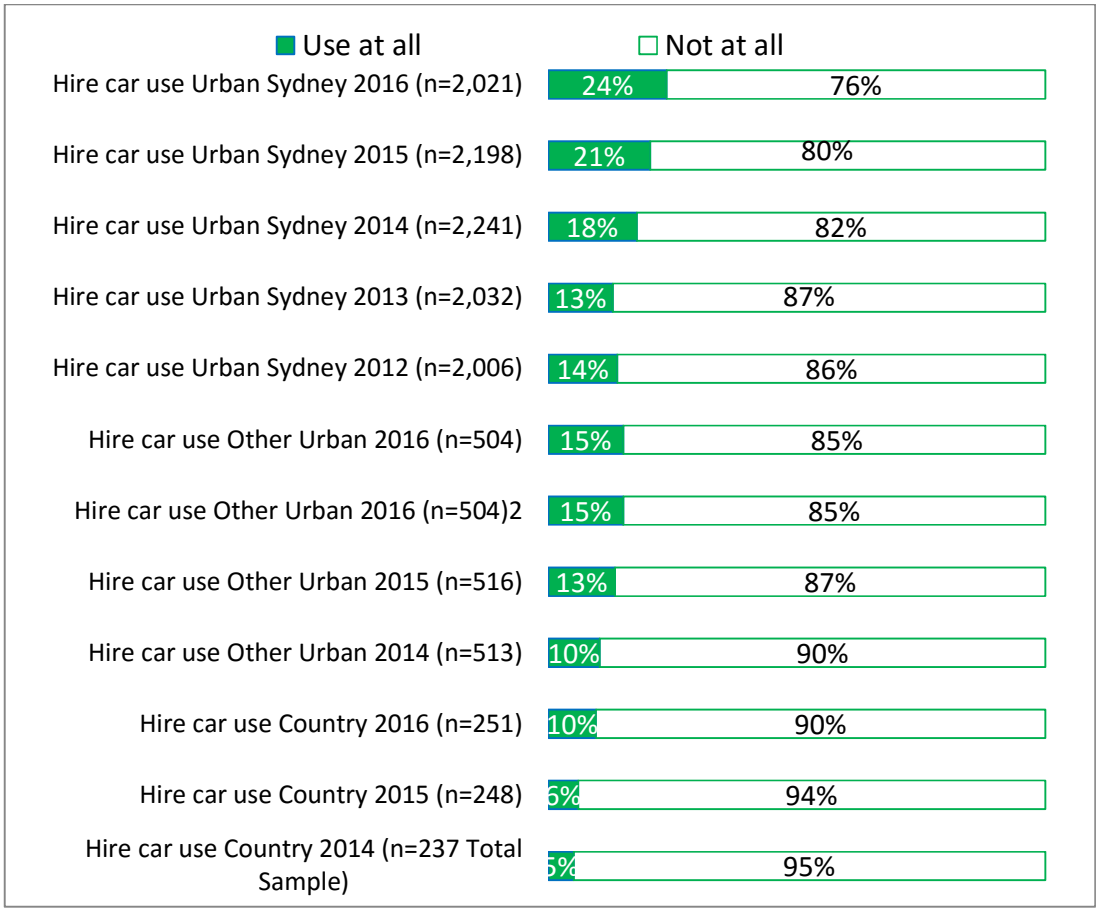
11.2. Hire car use

Figure 68 shows a consistent, statistically significant trend towards increasing prevalence of hire car use in Urban Sydney, up from 14% (2012) and 13% (2013) to 24% in 2016. While the growth is slow, the trend is now consistent over the past four years.

However, despite this increase, use in the past six months remains relatively low at 24%.

As in 2014 and 2015, in 2016 use is less prevalent in Other Urban (15%) and Country (10%) locations in 2016 than in Urban Sydney (24%). However, while the levels remain low and the increases fall well short of statistical significance, both regions outside Sydney are showing signs of an increasing prevalence of hire car use.

Figure 68. Prevalence of using hire car in last six months by survey year and location



Q42. In the last six months I have used a hire car with a driver …

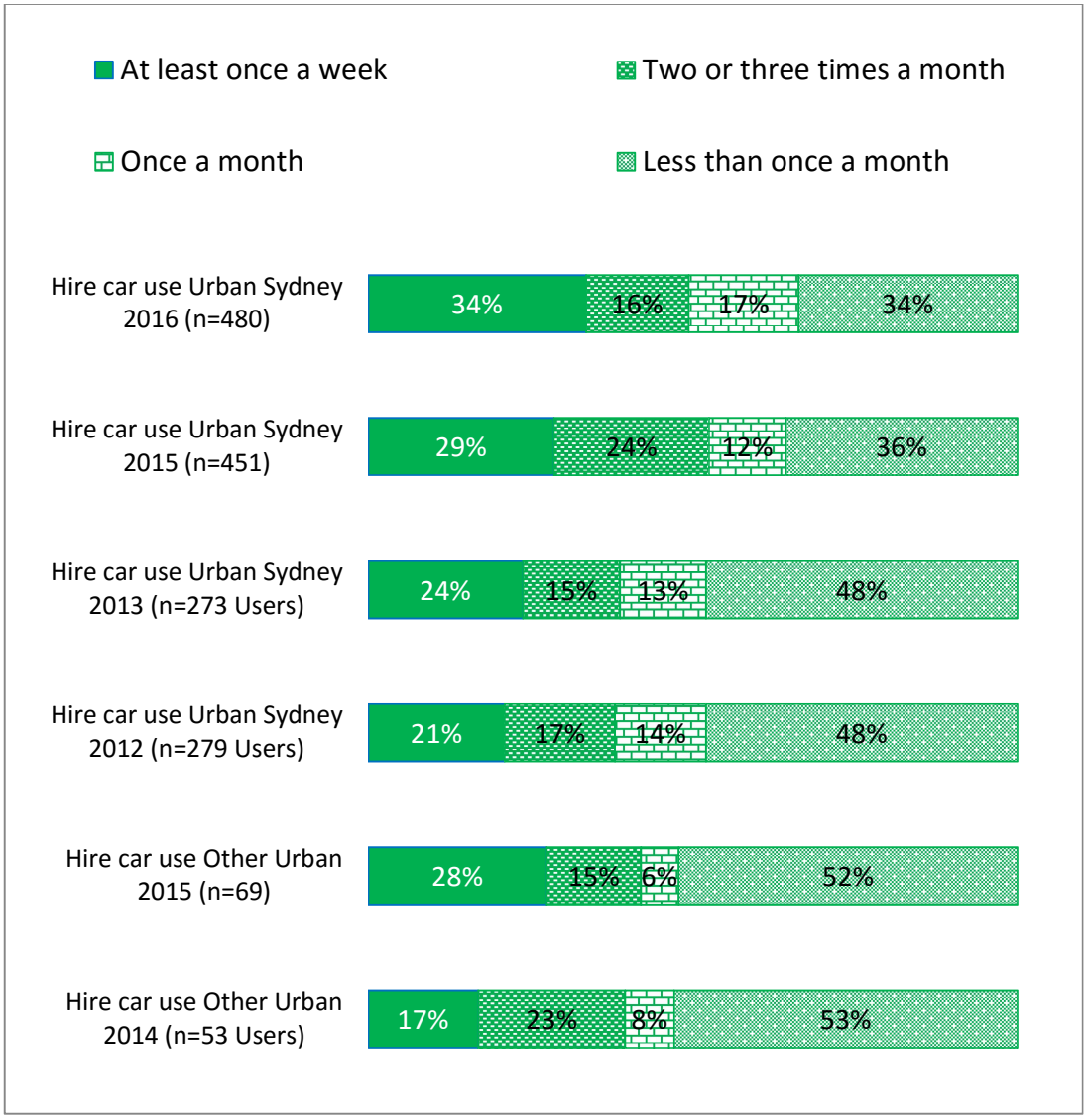
The frequency of use among users is shown in Figure 69. Results for Country locations in 2016 (n=24), 2015 and 2014 are not shown as the samples of hire car users in the Country are too small to give reliable results.

In Urban Sydney, about one in three users do so less than once a month.

In Other Urban locations in 2015 and 2014, and in Urban Sydney in 2013 and 2012 use is less frequent with close to half the users doing so less than once a month. However, there is a clear trend for use at least once a week to be increasing, rising from 21% of users in 2012 to 34% of users in 2016.

Frequency of use remains lower in Other Urban locations, although use at least once a week appears to have increased in 2016 (28% of users) from 2015 (17% of users). This could be a chance effect, but is consistent with increasing frequency of use among users, parallel to the increasing prevalence of use.

Figure 69. Frequency of using hire car in last six months by location and year (users only)



Q42. In the last six months I have used a hire car with a driver … (Base: Users)

Reasons for use of hire cars

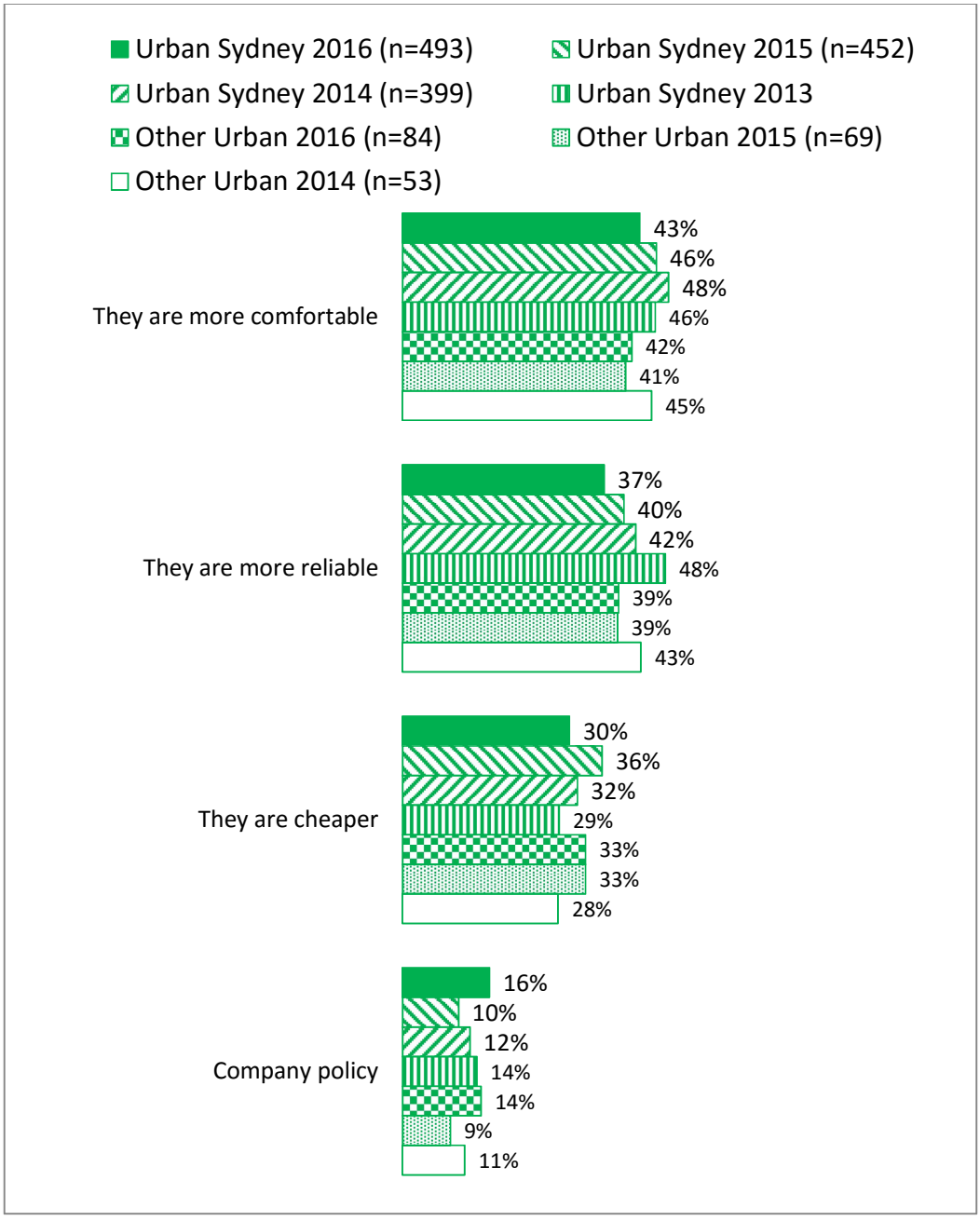
Figure 70 shows the reasons reported for using a hire car in Urban Sydney in 2016, 2015, 2014 and 2013, and for Other Urban in 2016, 2015 and 2014. Results for Country locations are not shown because the sample bases are too low to give reliable results.

There is very little difference between the results by year or by location. Comfort is consistently the reason given most often, followed by reliability. A substantial minority (around one in

three) consider hire cars cheaper than taxis. Around one in ten report that use of a hire car is company policy.

There is a consistent trend in Urban Sydney for endorsement of greater reliability as a reason for using a hire car rather than a taxi to decline, from a high of 48% in 2013 to a low of 37% in 2016.

Figure 70. Reasons for using a hire car Urban Sydney and Other Urban 2013 to 2106



Q43 I used the hire car with a driver instead of a taxi because ….

12. Other results

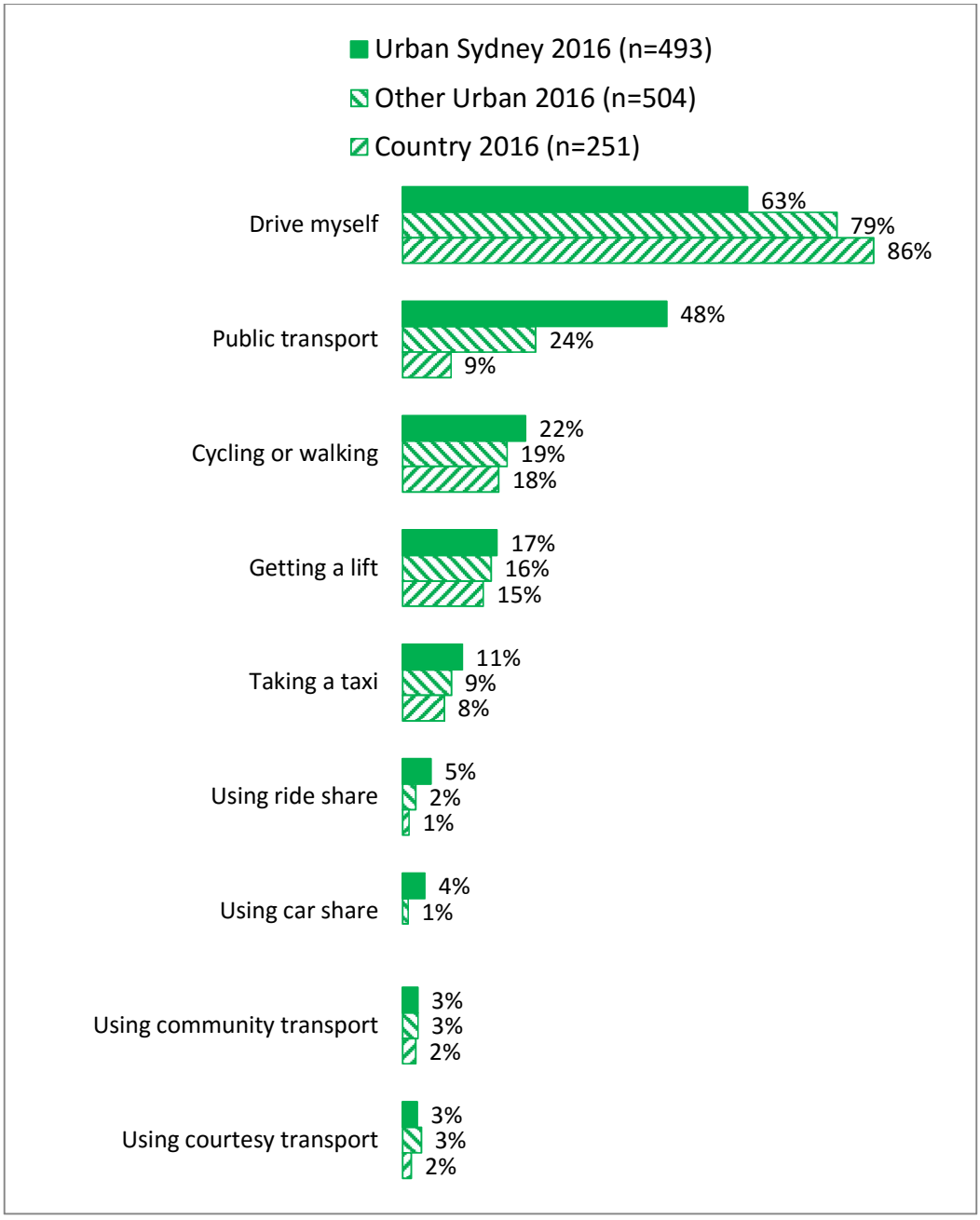
Respondents were asked how they usually get about. As shown in section 4.1, taxi use is strongly related to replies to this item, with those claiming to usually use some other modes in fact making more use of taxis than those who do not, or even than those who report they mostly get around by using taxis.

Figure 71 shows how replies break down across regions.

The dominant mode reported is, as expected, "driving myself". This is even higher in the Country towns (86%) than in Other Urban (79%) or Urban Sydney (63%). These results suggest that the replies do have some validity as this is the pattern that would be expected.

While the prevalence of ride share use has surged, and a substantial segment have used car share, these are still rarely seen as the way respondent usually get around, with these modes being endorsed as the usual mode by only 5% and 4% in Urban Sydney where they are most available.

Figure 71. Usual mode of travel by location - 2016



Q45 I usually get around by …

Household income

Reported household income is primarily used to analyse replies to other items. However, it is important to be sure that the sample does have a wide range of incomes so that the results are not being biased by coming from households that are skewed above or below the population household income distribution.

As is usually found (even in the national census) a substantial segment either can't say (4%) or prefers to not say (13%) what their household annual income actually is. These percentages are quite similar to those reported in the national census.

Analysis of replies to other items shows that those who do not give a household income tend to give answers to other items that are closer to those from low income households than those with middle or high incomes.

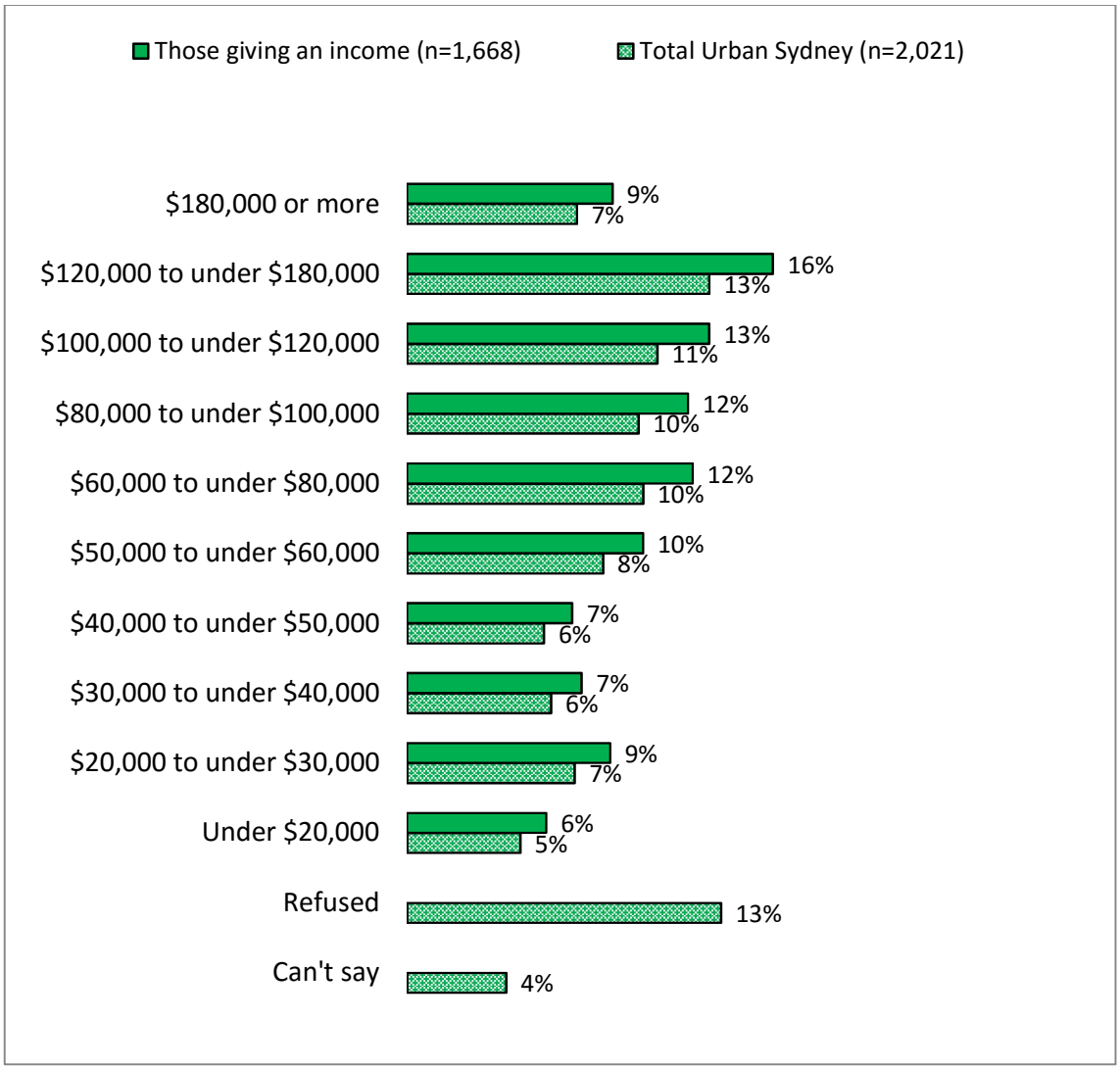
The distribution does show a very wide spread, with 6% of Urban Sydney respondents who gave an income value reporting their household receives under $20,000 per annum, and 9% reporting a household income of $180,000 or more.

Just over half those who report a household income say it is under $80,000 pa or less.

While it is difficult to compare exactly to the last published census results based on the 2011 census, the results do not suggest that the sample shows any serious bias in terms of household income.

The distributions for Urban Sydney are shown in Figure 72.

Figure 72. Reported household annual income of Urban Sydney residents, 2016



Q5DEM. 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 Taverner 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.

Other data items

Just on 10% of the sample report having a physical disability and only 1% report they need to use a wheelchair accessible taxi or ride share vehicle.

Among those who report having a physical disability, 27% of those living in Urban Sydney, 16% of those living in Other Urban and 19% of those living in Country towns report they receive

payment assistance for taxis. These respondents form 3% of the Urban Sydney sample, 2% of the Other Urban and 4% of the Country town samples.

Despite the small numbers, we have seen that those receiving payment assistance to use taxis do make much more use of taxis than either those with a reported disability who do not receive such assistance, or those who do not report having a disability.

13. APPENDIX 1: The questionnaire

NOTE: QUESTION TITLES AND CODE NUMBERS DID NOT APPEAR ON SCREEN.

5180 IPART TAXIS SURVEY Version: 10

INTRO

Thank you for taking part in this online survey - it should take 10 to 15 minutes for you to complete.

Please read each question and follow the instructions to record your replies. Some questions may also ask you to type in a comment. This survey is best viewed in full screen.

Please read the instructions and our privacy policy below before continuing.

About Taverner Research

Who are we/Privacy Policy

Taverner Research, an independent market research company abides by the Code of Professional Behaviour of the Australian Market & Social Research Society (AMSRS). If you have any questions, please email survey@taverner.com.au. You can also check that Taverner is an accredited research agency shown on the list of accredited companies on the Market and Social Research Society website at http://www.amsrs.com.au/directory-all/listing/?range=T&pageNo=0.

To view our Privacy Policy, please click http://www.taverner.com.au/surveys/pol.htm

Thank you in advance for taking part.

Please click 'Continue' at the bottom of the screen to continue.

INITIAL DEMOGRAPHICS

PREAMBLE:

To make sure we have a sample that is a good cross section of the population we need you to first answer the following questions.

Q1DEM (GENDER) I am…

1. Male
2. Female

Q2DEM (AGE GROUP) I am aged…

1. Under 16 TERMINATE
2. 16 to19
3. 20 to 24
4. 25 to 29
5. 30 to 39
6. 40 to 49
7. 50 to 59
8. 60 to 69
9. 70 to 70
10. 80 and over

Q3DEM (LOCATION) What is the postcode where you live?
NUMERIC (4 DIGITS ONLY)

Q3M (AREA) Hidden variable to capture location

1. Sydney
2. Newcastle (IF POSTCODE 2278, 2280, 2281, 2282, 2284, 2285, 2286, 2287, 2289, 2290, 2291, 2292, 2293, 2294, 2295, 2296, 2297, 2298, 2299, 2300, 2302, 2303, 2304, 2305, 2306, 2307, 2308, 2322)
3. Wollongong (IF POSTCODE 2500, 2502, 2505, 2506, 2508, 2515, 2516, 2517, 2518, 2519, 2525, 2526, 2528, 2530)
4. Gosford or Wyong (IF POSTCODE 2250, 2251, 2254, 2256, 2257, 2260, 2258, 2259, 2261, 2262, 2263)
5. Wagga Wagga (IF POSTCODE 2650
6. Orange (IF POSTCODE 2800)
7. Bathurst (IF POSTCODE 2795)
8. Goulburn (IF POSTCODE 2580)
9. Lismore (IF POSTCODE 2480)
10. Coffs Harbour(IF POSTCODE 2450)
11. Tamworth (IF POSTCODE 2340)
12. Broken Hill (IF POSTCODE 2880)
13. Dubbo (IF POSTCODE 2830)
14. Port Macquarie (IF POSTCODE 2444)
15. Nowra (IF POSTCODE 2541)
16. Armidale (IF POSTCODE 2350)
17. Taree (IF POSTCODE 2430)
18. Out of area (ANY OTHER POSTCODE) TERMINATE

FOR DEFINITION OF CODE 1 (SYDNEY) SEE FOLLOWING LIST

FILTERS TO QUALIFY Q3M=1 ARE AS LISTED BELOW. THESE DEFINE CODE 1 FOR Q3M. ANY POSTCODE NOT ON THE LIST IN Q3M AND ALSO NOT ON THE LIST BELOW BECOMES CODE 18

IF 2000 IN Q3DEM Q3M=1
IF 2006 to 2011 IN Q3DEM Q3M=1
IF 2015 to 2050 IN Q3DEM Q3M=1
IF 2052 IN Q3DEM Q3M=1
IF 2055 IN Q3DEM Q3M=1
IF 2060 to 2077 IN Q3DEM Q3M=1
IF 2079 to 2090 IN Q3DEM Q3M=1
IF 2092 to 2097 IN Q3DEM Q3M=1
IF 2099 to 2108 IN Q3DEM Q3M=1
IF 2110 to 2122 IN Q3DEM Q3M=1
IF 2125 to 2128 IN Q3DEM Q3M=1
IF 2130 to 2138 IN Q3DEM Q3M=1
IF 2140 to 2148 IN Q3DEM Q3M=1
IF 2150 to 2168 IN Q3DEM Q3M=1
IF 2170 to 2179 IN Q3DEM Q3M=1
IF 2190 to 2200 IN Q3DEM Q3M=1
IF 2203 to 2214 IN Q3DEM Q3M=1
IF 2216 to 2234 IN Q3DEM Q3M=1
IF 2555 to 2560 IN Q3DEM Q3M=1
IF 2563 to 2574 IN Q3DEM Q3M=1
IF 2745 IN Q3DEM Q3M=1
IF 2747 to 2750 IN Q3DEM Q3M=1
IF 2752 TO 2754 IN Q3DEM Q3M=1
IF 2756 IN Q3DEM Q3M=1
IF 2759 to 2763 IN Q3DEM Q3M=1
IF 2765 to 2770 IN Q3DEM Q3M=1

Q4DEM (OCCUPATIONAL STATUS) I am…

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

Q3PRE

**SHOW ALL

In all these questions the word "taxis" EXCLUDES UberX or other ride share services using private vehicles.

Q1. (HOW OFTEN). In the last six months I caught a taxi in [Q3M]

1. More than five times a week
2. Three to five times a week
3. One to two times a week
4. Two to three times a month
5. Once a month
6. Less than once a month
7. Not at all

Q49. (RIDE SHARING SERVICE) In the last six months I have used a ride sharing service (for example, UberX or GoCar or GoBuggy) …

1, More than five times a week
2, Three to five times a week
3, One to two times a week
4, Two to three times a month
5, Once a month
6, Less than once a month
7, Not at all

Q47. (CAR SHARING SERVICE) In the last six months I have used a car sharing service (for example, driving myself in a car from GoGet, GreenShareCar, Car Next Door or Hertz 24/7)

1, More than five times a week
2, Three to five times a week
3, One to two times a week
4, Two to three times a month
5, Once a month
6, Less than once a month
7, Not at all

Q2. (USAGE CHANGE). Thank you. Next we ask some questions about your views on using taxis. Remember, In all these questions the word "taxis" EXCLUDES UberX or other ride share services using private vehicles and car share services like GoGet, and use of hire cars.
Compared to the previous 12 months, in the last 12 months

1. I caught taxis more
2. I caught taxis less
3. There has been no change in how often I have caught taxis

SHOW Q2A IF 1 AT Q2

Q2A (CAUGHT TAXIS MORE) I caught taxis more frequently because…

MULTIPLE RESPONSE

1. I find them less expensive
2. I have more disposable income
3. I'm going out more
4. Because I don't have to wait as long to catch a taxi, or I think a taxi is more likely to turn up after I have booked it
5. I have less access to alternatives such as a car, or public transport when I need it
6. Because the service for booking taxis over the phone has improved
7. Because it has become easier to book taxis with apps
8. I think drivers have become less inclined to take longer routes or overcharge me
9. I have found that driver behaviour and knowledge has improved in [Q3M]
10. For another reason

SHOW Q2B IF 2 AT Q2

Q2B (CAUGHT TAXIS LESS) I caught taxis less frequently because…

MULTIPLE RESPONSE

1. I find them more expensive
2. I have less disposable income
3. I'm going out less
4. Because I find I have to wait longer to catch a taxi, or I can't rely on the taxi turning up after I have booked it
5. I have better access to a car
6. Public transport has improved when I need it
11. I use ride share (such as UberX) instead
12. I use car share, hire car, community transport or courtesy buses instead
7. Because booking services have become worse
8. I think drivers have become more inclined to take longer routes or overcharge me
9. I have found that driver behaviour and knowledge has become worse in [Q3M]
10. For another reason

TAXI USE

SHOW Q2C IF 1 OR 2 AT Q4DEM

Q2C (WORK TAXI POLICY) My workplace…

1. Often or sometimes pays for staff to travel by taxi for work related purposes
2. Never pays for staff to travel by taxi for work related purposes

SHOW Q2D IF (1 OR 2 AT Q4DEM) AND 1 AT Q2C

Q2D (WORK TAXI ACCESS) In the last 12 months…

1, My employer allowed staff to catch taxis more frequently compared to the previous 12 months
2, My employer allowed staff to catch taxis less frequently compared the previous 12 months

3, There has been no change to work taxi travel policies that I know of

Q3 (FUTURE TAXI USE) In the next 12 months, the thing that is most likely to get me to catch taxis more regularly is:

1, If fares get cheaper
2, If there is a shorter time to wait to get a taxi
3, If booking services improve
4, If driver quality improves
5, None of these improvements would make me catch taxis more regularly

Q3A (WILLINGNESS TO PAY) In the next 6 months if I were paying all the fare myself, the longest trip I would be willing to take by taxi from those listed below would be ….

1, 3 km (Around $10)
2, 5 km (Around $16)
3, 15 km (Around $38)
4, 20 km (Around $48)
5, 30 km (Around $75)
6, over 50 km (More than $110)
7, I would not take any of these taxi trips

IF Q1 = 7 GO TO Q13

IF Q1 = 1-6 GO TO Q4

THOSE WHO USED TAXI IN PAST 6 MONTHS

Q4 (TAXI VALUE FOR MONEY) Overall, I think…

RANDOMISE

1. Taxi fares are good value for money
2. Taxi fares are not good value for money

Q5. (VALUE FOR MONEY BEFORE 10 PM) Taxi fares in the day and the evening (before 10 pm) are…

RANDOMISE CODES 1 AND 2 ONLY

1. Good value for money
2. Not good value for money
3. I'm not sure because I don't take taxis before 10 pm

Q6. (VALUE FOR MONEY ON A FRIDAY AND SATURDAY EVENING) Taxi fares on Friday and Saturday evenings (after 10 pm) are…

RANDOMISE CODES 1 AND 2 ONLY

1, Good value for money
2, Not good value for money
3, I'm not sure because I don't take taxis on Friday and Saturday nights

Q7. (VALUE FOR MONEY AFTER 10 PM ON SUNDAY TO THURSDAY) Taxi fares at night (after 10 pm) on Sunday to Thursday are …

RANDOMISE CODES 1 AND 2 ONLY

1. Good value for money
2. Not good value for money
3. I'm not sure because I don't take taxis on other evenings after 10 pm.

Q8. (VALUE FOR MONEY SHORT DISTANCES) Taxi fares for short distances (less than 5 km) are:

RANDOMISE CODES 1 AND 2 ONLY

1. Good value for money
2. Not good value for money
3. I'm not sure because I haven't travelled short distances

Q9. (VALUE FOR MONEY LONG DISTANCES) Taxi fares for long distances (more than 15 km) are:

RANDOMISE CODES 1 AND 2 ONLY

1, Good value for money
2, Not good value for money
3, I'm not sure because I haven't travelled long distances

Q10. (REASONABLE TIME TAKEN TO GET A TAXI – DAY) During the day, I think that:

RANDOMISE CODES 1 AND 2 ONLY

1. The time taken to get a taxi is reasonable
2. It takes too long to get a taxi
3. I'm not sure because I haven't tried to catch a taxi during the day

Q11. (REASONABLE TIME TAKEN TO GET A TAXI - FRIDAY AND SATURDAY NIGHTS) On Friday and Saturday nights, I think that:

RANDOMISE CODES 1 AND 2 ONLY

1. The time taken to get a taxi is reasonable
2. It takes too long to get a taxi
3. I'm not sure because I haven't tried to catch a taxi on Friday and Saturday nights

Q12. (REASONABLE TIME TAKEN TO GET A TAXI – OTHER NIIGHTS) On Sunday to Thursday nights, I think that:

RANDOMISE CODES 1 AND 2 ONLY

1. The time taken to get a taxi is reasonable
2. It takes too long to get a taxi
3. I'm not sure because I haven't tried to catch a taxi on Sunday to Thursday nights

ASK ALL

Q13. (ABLE TO GET TAXI FOR LAST JOURNEY) When I last tried to catch a taxi I was

1. Able to get one
2. Not able to get one because one didn't turn up after I had booked it
3. Not able to get one because one didn't come to my rank
4. Not able to get one because one didn't drive past when I was trying to hail one
5. It was so long ago that I last tried to catch a taxi that I don't remember.

SELECT WHETHER WILL ASK ABOUT MOST RECENT TAXI OR MOST RECENT RIDESHARE TRIP

IF 7 in Q1 AND 7 IN Q49 GO TO Q30

IF 1-6 IN Q1 AND 7 IN Q49 JUMP FILL Q13A WITH CODE 1

IF 7 IN Q1 AND 1-6 IN Q49 JUMP FILL Q13A WITH CODE 2

***IF 1-6 IN TWO OF Q1 AND Q49, RESPONDENT ASKED Q13A

DO NOT SHOW Q13A.

AUTOMATICALLY FILL Q13A WITH CODE 1 IF 1-6 IN Q1 AND 7 IN Q49

AUTOMATICALLY FILL Q13A WITH CODE 2 IF 7 IN Q1 AND 1-6 IN Q49

SKIP Q13A IF 1-6 IN Q1 AND 1-6 IN Q49 AND GO TO RANDOM NUMBER GENERATOR

Q13A. (LAST PAID TRIP BY TAXI / RIDE SHARE) HAS ONLY USED A ….MASK

1, Taxi
2, Rideshare

IF 1 IN Q13A GO TO Q14

IF 2 IN Q13A GO TO Q14RS

GENERATE RANDOM INTEGER BETWEEN 1 AND 10. IF 1 TO 3 GENERATED FILL Q13_SEL WITH CODE 2 (RIDESHARE). IF A VALUE OF 4 TO 10 GENERATED FILL Q13_SEL WITH 1(TAXI)

**DO NOT DISPLAY Q13-SEL

MAKE SELECTION ON Q13SEL IF Q13A IS EMPTY

Q13_SEL. SELECTION MASK

1, taxi
2, rideshare

SHOW Q14 IF Q13_SEL=1 OR Q13A = 1.

IF Q13A=2 OR Q13_SEL=2 GO TO "NOT CATCHING A TAXI QUESTIONS" AND THE SKIPS BEFORE Q30

Q14. BOARDED - location On my most recent taxi trip, I started my journey …

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

IF 4-17 IN Q3M DISPLAY CODES 5-7)

1, In the [Q3M] CBD
2, Less than 20 km from the [Q3M] CBD
3, More than 20 km from the [Q3M] CBD
4, At the Airport
5, In the centre of town
6, Less than 20 km from the centre of town
7, More than 20 km from the centre of town

IF 4 IN Q14 GO TO Q15

Q14A. BOARD - This was….

1, From my house
2, From somewhere else

Q15. (ALIGHTED – LOCATION) In my most recent taxi trip in [Q3M], I got out …

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

IF 4-17 IN Q3M DISPLAY CODES 5-7

1, In the [Q3M] CBD
2, Less than 20 km from the [Q3M] CBD
3, More than 20 km from the [Q3M] CBD
4, At the Airport
5, In the centre of town
6, Less than 20 km from the centre of town
7, More than 20 km from the centre of town

If 4 in Q15, or 1 in Q14A go to Q15B

Q15A. (ALIGHTED - HOME) This was….

1, To my house
2, To somewhere else

IF NOT 1 IN Q3M SKIP TO Q16

Q15B. Did you cross the harbour using the Sydney Harbour Bridge or Sydney Harbour Tunnel?

1, Yes, going north
2, Yes, going south
3, No

Q16. DISTANCE My most recent taxi trip in [Q3M] was ...

1, Less than 5 km
2, 5 to under 10 km
3, 10 to under 25 km
4, 25 km to under 50 km
5, 50 km or more

SHOW Q17 FOR FEB WAVE ONLY

Q17. (MONTH) My most recent taxi trip in [Q3M] was in …

1, December
2, January
3, Another month

Q18. (DAY) My most recent taxi trip in [Q3M] was on …

1, Monday to Thursday
2, Friday or Saturday or Sunday before 5am
3, Sunday after 5 am

Q19. (TIME) My most recent taxi trip in [Q3M] was …

1, In the morning (before midday)
2, Between midday and 6 pm
3, Between 6 pm and 10 pm
4, At night (10pm or after but before daylight)

Q20. (PURPOSE) My main purpose in taking my most recent taxi trip in [Q3M] was …

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)
6, Moving items from one place to another
5, Other (such as education related)

Q21. REASON FOR TAXI The main reason I took a taxi for this journey instead of other transport options was …

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
6, More reliable than alternatives
7, Makes different types of vehicle (like a van, ute or luxury car) available
4, I didn't have access to any other transport options
5, Another reason

BOOKING AND WAIT FOR TAXIS

Q22. HOW ORGANISED I got the taxi …

1, At a taxi rank
2, Hailed/waved down on the street
3, Phoned a taxi company
4, By internet booking
5, Phoned a driver direct
6, Had a regular booking
7, Used a smartphone application (app)
8, I'm not sure because someone else books for me

IF 1 IN Q22 GO TO 23A

IF 2 IN Q22 GO TO Q23B

IF 3 TO 6 IN Q22 GO TO Q24

If 1 in Q13A and 7 in Q22, go to Q22a

IF 8 IN Q22 GO TO Q25

SHOW Q22A IF 7 AT Q22

Q22A. (APP ORGANISED) I used

1, mTAXI
2, Silver Service
3, Legion Cabs
8, UberTAXI
4, goCatch
5, ingogo
7, iCab
9, RSL Cabs
10, StGeorge
11, ABC Taxis
12, 12 South Western
13, Apple Taxis
6, Another app

GO TO Q24

SHOW Q23A IF 1 AT Q22

Q23A. (WAITING TIME – AT RANK) At the rank I had to wait …

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

GO TO Q25

SHOW Q23B IF 2 AT Q22

Q23B. (WAITING TIME – HAILING) By hailing a taxi from the street I got a taxi in …

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

GO TO Q25

Q24. (BOOKING – WAITING TIME) I booked ...

1, the "next available" taxi
2, a taxi for a particular time

IF 2 IN Q24 GO TO Q24B

Q24A. WAITING TIME NEXT AVAILABLE After the taxi was booked, I had to wait …

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

IF 1-2 IN Q24A GO TO Q25

IF 3-5 IN Q24A GO TO Q24C

Q24B (BOOKED ARRIVAL TIME) The taxi arrived ..

1, On time
2, It was less than 5 minutes late
3, It was at least 5 but less than 10 minutes late
4, It was at least 10 but less than 20 minutes late
5, It was at least 20 but less than 40 minutes late
6, It was 40 minutes or more late

IF 1 IN Q24B GO TO Q25

Q24C (LATE ARRIVAL) Which did you do?

IF 1 IN Q13A DISPLAY CODES 1,2, 3, 5

IF 2 IN Q13A DISPLAY CODES 4, 5, 6, 7

1, I called again because the taxi was not on time
2, I called again because the taxi did not come quickly enough
4, I contacted the driver because the car did not come quickly enough
5, The driver contacted me to tell me what was happening
6, I cancelled that rideshare booking and booked another car
7, I cancelled that rideshare booking and called a taxi
3, I did not call again - I just waited

Q25. (WAITING TIME SATISFACTION) For the time I had to wait to catch a taxi this trip, I was

1, Very dissatisfied
2, Dissatisfied
3, Slightly dissatisfied
4, Slightly satisfied
5, Satisfied
6, Very Satisfied

Q26. (FARE AMOUNT) The fare, including any service fee for electronic payment, was …

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

Q27. HOW FARE PAID The fare was paid by …

1, Cash
2, Credit card
3, Debit card
4, Cabcharge
5, On a smartphone eg using a phone app
6, In some other way
7, I'm not sure because someone else paid

Q28. WHO COVERED COST The cost of the trip was covered …

1, By me personally
2, Split between me and some else
3, By my own business
4, By my employer
5, By a client

6, By someone else not listed above

IF 3-6 IN Q28 GO TO Q30

Q29. FARE SATISFACTION For the amount I paid for this trip, I was:

1, Very dissatisfied
2, Dissatisfied
3, Slightly dissatisfied
4, Slightly satisfied
5, Satisfied
6, Very Satisfied

NOT CATCHING TAXI – ASK ALL

Q30. CONSIDERED TAKING A TAXI BUT DID NOT In the last 6 months …

IF 1-6 IN Q1 HIDE CODE 2

IF 7 IN Q1 HIDE CODE 3

1, At least once I thought about taking a taxi and in the end did not
2, I have not thought of taking a taxi in the last six months
3, I always took a taxi when I thought about taking one

IF 2 IN Q30 GO TO Q41

IF 3 IN Q30 GO TO Q40

Q31. The last time I thought about taking a taxi but in the end did not

1, I tried to take a taxi but I couldn't get one
2, I thought about taking a taxi but then decided to do something different

Q32. ALTERNATIVE USED The last time I tried to catch a taxi or thought about catching a taxi and in the end did not, I …

1, Decided not to make the journey at all
2, Took a train
3, Took a regular bus (ie, not a courtesy bus)
4, Used community transport (provided in a vehicle other than a taxi)
5, Drove myself or got a lift
6, Took a hire car with a driver
7, Walked or cycled
8, Used a car sharing service such as GoGet, GreenShareCar, Car Next Door or Hertz 24/7
9, Used a ride sharing service such as UberX or RideSurfing
10, Used courtesy transport provided by a venue such as a pub or club.

SHOW Q33A IF 1 IN Q31

Q33A. REASONS DID NOT TAKE A TAXI WHEN I TRIED TO The last time I did not catch a taxi although I tried to, I did something else because …

SELECT ONE

1, The wait at the taxi rank was too long or there were no taxis at the rank and I gave up
2, I booked a taxi but it didn't turn up
3, I wanted to hail one but I didn't see any vacant taxis driving by, or the taxi didn't stop when I hailed it
4, I told the driver where I wanted to go and they refused to take me
5, For some other reason

GO TO QUESTION 36

SHOW Q33B IF 2 IN Q31

Q33B. REASONS DID NOT TAKE A TAXI WHEN THOUGHT ABOUT IT The last time I did not take a taxi although I thought about it, I did something else because …

MULTIPLE RESPONSE

1, I thought it would be too expensive
2, I didn't book a taxi because I was worried I might have to wait too long for one to come or that a taxi might not turn up at all
3, I thought the wait at the taxi rank was too long
4, I thought about hailing one but I thought the wait would be too long
5, A bus arrived before a taxi

IF WAVE 1 GO TO Q38

Q36. MONTH The last time I tried to catch a taxi or thought about catching a taxi but in the end did not, was in …

1, December
2, January
3, Another month

Q38. DAY The last time I tried to catch a taxi or thought about catching a taxi but in the end did not, was on …

1, Monday to Thursday
2, Friday or Saturday, or Sunday before 5am
3, Sunday after 5 am

Q39. TIME The last time I tried to catch a taxi or thought about catching a taxi but in the end did not, was …

1, In the morning (before midday)
2, Between midday and 6 pm
3, Between 6 pm and 10 pm
4, At night (10pm or after but before daylight)

TAXI PROBLEMS

IF 7 IN Q1 GO TO Q41

Q40. PROBLEMS WITH TAXI USE In the past 12 months

1, I have personally experienced one or more problems either during a taxi journey or when I was trying to catch one
2, I have not experienced a problem during a taxi journey or when I was trying to catch one

IF 2 IN Q40 GO TO PREQ48

Q40A. IDENTIFY TAXI PROBLEMS Problems I have experienced in the last 12 months include:

MULTIPLE RESPONSE

1, I couldn't get a taxi when I wanted one
2, I was overcharged
3, The driver did not take the most direct route
4, The driver did not know where they were going
5, The driver refused to take me somewhere after I told them where I was going
6, I felt unsafe because of the way the driver way driving, or the taxi driver was breaking the road rules
7, The driver was rude, unhelpful, or offensive
8, Something else

IF Q40A = 8, SHOW Q40B

Q40B: When I said I had a problem with something else, it was:

OPEN

SHOW Q41 IF 2 AT Q30

Q41. HAVEN'T CONSIDERED A TAXI I have not considered taking a taxi because…

MULTIPLE RESPONSE

1, Driving myself is more convenient
2, They are too expensive
3, The waiting times are too long
4, I am worried a taxi won't show up after I book one
6, The taxi might not be safe
7, Company policy
5, For some other reason

RIDE SHARE USE

****Have preQ 48 on a separate page – as for taxis**

PREQ48 Now for some questions about your views on using ride share services (for example, UberX or GoCar or GoBuggy).

Q49B. (USAGE CHANGE)
Compared to the previous 12 months, in the last 12 months

1. I used ride share services more
2. I used ride share services less
3. There has been no change in how often I have used ride share services

SHOW Q49C IF Q49B = 1

Q49C (USED RIDE SHARE SERVICES MORE) I used ride share services more frequently because

MULTIPLE RESPONSE

1. I find them less expensive than before
2. I have more disposable income
3. I'm going out more
4. Because I don't have to wait as long to get one, or I think a ride share is more likely to turn up after I have booked it
5. I have less access to alternatives such as a car, or public transport when I need it
6. Because the service for booking ride share services is better than for booking taxis
7. Because it has become easier to book a ride share service with an app
8. Because I get a fare estimate quoted in advance
9. I have found that driver behaviour and knowledge has improved in [Q3M]
10. Because they were not available previously or I did not know about them before then
11. For another reason

SHOW Q49D IF Q49B = 2

Q49D. (USE RIDE SHARE SERVICES LESS) I used ride share services less frequently because

MULTIPLE RESPONSE

1. They have become more expensive than they were
2. I have less disposable income
3. I'm going out less
4. Because I find I have to wait longer to get one, or I can't rely on the car turning up after I have booked it
5. I have better access to a car
6. Public transport has improved when I need it
12. I use car share (such as GoGet) instead
13. I use taxis instead
11. I have better access to other transport alternatives
7. Because booking apps have become worse or are too difficult
8. Because peak or surge pricing makes them too expensive
9. I have found that ride share driver behaviour and knowledge has become worse in [Q3M]
10. For another reason

Q49E. (FUTURE RIDESHARE USE) In the next 12 months, the thing that is most likely to get me to use rideshare more regularly is

6. If rideshare becomes available in my area
1. If fares get cheaper
2. If there is a shorter time to wait to get a rideshare
3. If booking services improve
4. If driver quality improves
7. If there is no peak or surge pricing
5. None of these improvements would make me catch rideshare more regularly

IF 7 IN Q49 GO TO Q30RS

IF 1-6 in Q49 CONTINUE WITH Q49F

Q49F. (RIDESHARE VALUE FOR MONEY) Overall, I think:

RANDOMISE DISPLAY

1. Ride share fares are good value for money
2. Ride share fares are not good value for money

Q49G. (RIDE SHARE VALUE FOR MONEY – STANDARD PRICING) Ride share fares when peak or surge pricing is NOT operating:

RANDOMISE

1. Are good value for money
2. Are not good value for money

Q49H. (RIDE SHARE VALUE FOR MONEY –PEAK OR SURGE PRICING) Ride share fares when peak or surge pricing IS operating

RANDOMISE IN BLOCKS OF 2

1. Are good value for money
2. Are not good value for money
3. I don't know because I don't use ride share services when peak or surge pricing is operating
4. I don't know because I don't know what peak or surge pricing is
5. Are sometimes good value for money and sometimes not, depending on what the surge or peak price is

Q49I - (IMPACT OF RIDE SHARE USE ON TAXI USE) As a result of using ride share I use taxis

1. About as frequently as I used to
2. A little less
3. A lot less
4. I no longer use taxis
5. More than I used to
6. I never used taxis

Q49L. (REASONABLE TIME TAKEN TO GET A RIDESHARE – DAY) During the day, I think that:

RANDOMISE 1 AND 2

1. The time taken to get a rideshare is reasonable
2. It takes too long to get a rideshare
3. I'm not sure because I haven't tried to catch a rideshare during the day

Q49J. (REASONABLE TIME TAKEN TO GET A RIDESHARE - FRIDAY AND SATURDAY NIGHTS) On Friday and Saturday nights, I think that:

RANDOMISE 1 AND 2

1. The time taken to get a rideshare is reasonable
2. It takes too long to get a rideshare
3. I'm not sure because I haven't tried to catch a rideshare on Friday and Saturday nights

Q49K. REASONABLE TIME TAKEN TO GET A RIDESHARE – OTHER NIGHTS. On Sunday to Thursday nights, I think that:

RANDOMISE 1 AND 2

1, The time taken to get a rideshare is reasonable
2, It takes too long to get a rideshare
3, I'm not sure because I haven't tried to catch a rideshare on Sunday to Thursday nights

SHOW Q49M FOR CODES 1 OR 2 AT Q4DEM

Q49M (WORK RIDESHARE POLICY) My workplace ….

1, Often or sometimes pays for staff to travel by rideshare for work related purposes
2, Never pays for staff to travel by rideshare for work related purposes

SHOW Q49N IF 1 AT Q49M

Q49N (RIDESHARE ACCESS FOR WORK) In the last 12 months….

1, My employer allowed staff to catch rideshare more frequently compared to the previous 12 months
2, My employer allowed staff to catch rideshare less frequently compared the previous 12 months
3, There has been no change to work rideshare travel policies that I know of

IF 1 IN Q13_SEL GO TO NOT GETTING RIDE SHARE SKIPS BEFORE Q30RS.

IF 2 IN Q13A OR 2 IN Q13_SEL SHOW Q14RS

Q14RS. BOARDED LOCATION - On my most recent ride share trip, I started my journey …

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

IF 4-17 IN Q3M DISPLAY CODES 5-7)

1. In the [Q3M] CBD
2. Less than 20 km from the [Q3M] CBD
3. More than 20 km from the [Q3M] CBD
4. At the Airport
5. In the centre of town
6. Less than 20 km from the centre of town
7. More than 20 km from the centre of town

IF 4 IN Q14RS GO TO Q15RS

Q14RSA. BOARD - This was….

1, From my house
2, From somewhere else

Q15RS. (ALIGHTED – LOCATION) In my most recent ride share trip in [Q3M], I got out …

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

IF 4-17 IN Q3M DISPLAY CODES 5-7

1. In the [Q3M] CBD
2. Less than 20 km from the [Q3M] CBD
3. More than 20 km from the [Q3M] CBD
4. At the Airport
5. In the centre of town
6. Less than 20 km from the centre of town
7. More than 20 km from the centre of town

IF 4 IN Q15RS, OR 1 IN Q14RSA GO TO Q15RSB

Q15RSA. (ALIGHTED - HOME) This was….

1. To my house
2. To somewhere else

IF NOT 1 IN Q3M SKIP TO Q16RS

Q15RSB. Did you cross the harbour using the Sydney Harbour Bridge or Sydney Harbour Tunnel?

1. Yes, going north
2. Yes, going south
3. No

Q16RS. DISTANCE My most recent ride share trip in [Q3M] was …

1. Less than 5 km
2. 5 to under 10 km
3. 10 to under 25 km
4. 25 km to under 50 km
5. 50 km or more

SHOW Q17RS FOR FEB WAVE ONLY

Q17RS. (MONTH) My most recent ride share trip in [Q3M] was in …

1. December
2. January
3. Another month

Q18RS. (DAY) My most recent ride share trip in [Q3M] was on …

1. Monday to Thursday
2. Friday or Saturday, or Sunday before 5am
3. Sunday after 5 am

Q19RS. (TIME) My most recent ride share trip in [Q3M] was …

1. In the morning (before midday)
2. Between midday and 6 pm
3. Between 6 pm and 10 pm
4. At night (10pm or after but before daylight)

Q20RS. (PURPOSE) My main purpose in taking my most recent ride share trip in [Q3M] was …

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. Other (such as education related)

Q21RS. REASON FOR RIDE SHARE The main reason I took a ride share for this journey instead of other transport options was …

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

Q22RSB APP USED TO BOOK RIDESHARE I used

1, uberX
2, Gocatch GoCar
3, GoBuggy
8, Another app

GO TO Q24RS

Q24RS. (BOOKING – WAITING TIME) I booked ...

1. the "next available" ride share
2. a ride share for a particular time

IF 2 IN Q24RS GO TO Q24RSB

Q24RSA. WAITING TIME NEXT AVAILABLE After the ride share was booked, I had to wait …

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

IF 1-2 IN Q24RSA GO TO Q25RS

IF 3-5 IN Q24RSA GO TO Q24RSC

Q24RSB (BOOKED ARRIVAL TIME) The ride share arrived ..

1. On time
2. It was less than 5 minutes late
3. It was at least 5 but less than 10 minutes late
4. It was at least 10 but less than 20 minutes late
5. It was at least 20 but less than 40 minutes late
6. It was 40 minutes or more late

IF 1 IN Q24RSB GO TO Q25RS

Q24RSC (LATE ARRIVAL) Which did you do?

IF 1 IN Q13A DISPLAY CODES 1,2, 3, 5

IF 2 IN Q13A DISPLAY CODES 4, 5, 6, 7

1. I called again because the taxi was not on time
2. I called again because the taxi did not come quickly enough
3. I contacted the driver because the car did not come quickly enough
4. The driver contacted me to tell me what was happening
5. I cancelled that rideshare booking and booked another car
6. I cancelled that rideshare booking and called a taxi
7. I did not call again - I just waited

Q25RS. (WAITING TIME SATISFACTION) For the time I had to wait to catch this trip, I was

1. Very dissatisfied
2. Dissatisfied
3. Slightly dissatisfied
4. Slightly satisfied
5. Satisfied

6. Very Satisfied

Q26RS. (FARE AMOUNT) The fare, including any service fee for electronic payment, was …

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

Q28RS. WHO COVERED COST The cost of the trip was covered …

1. By me personally
2. Split between me and some else
3. By my own business
4. By my employer
5. By a client
6. By someone else not listed above

IF 3-6 IN Q28RS GO TO Q30RS

Q29RS. FARE SATISFACTION For the amount I paid for this trip, I was:

1. Very dissatisfied
2. Dissatisfied
3. Slightly dissatisfied
4. Slightly satisfied
5. Satisfied
6. Very Satisfied

NOT GETTING RIDE SHARE

Q30RS. CONSIDERED USING A RIDE SHARE SERVICE BUT DID NOT In the last 6 months …

IF 1-6 IN Q49 HIDE CODE 2
IF 7 IN Q49 HIDE CODE 3

1, At least once I thought about using a ride share service and in the end did not
2, I have not thought of taking a ride share service in the last six months
3, I always took a ride share service when I thought about taking one

IF 2 IN Q30RS GO TO Q41RS

IF 3 IN Q30RS GO TO Q40RS

Q31RS. The last time that I thought about using a ride share service but in the end did not

1, I tried to take a ride share service but I couldn't get one
2, I thought about taking a ride share service but then decided to do something different

Q32RS. ALTERNATIVE USED The last time I tried to catch a ride share service or thought about catching a ride share service and in the end did not, I …

1, Decided not to make the journey at all
2, Took a train
3, Took a regular bus (ie, not a courtesy bus)
4, Used community transport (provided in a vehicle other than a ride share service)
5, Drove myself or got a lift
6, Took a hire car with a driver
7, Walked or cycled
8, Used a car sharing service such as GoGet, GreenShareCar, Car Next Door or Hertz 24/7
9, Took a taxi
10, Used courtesy transport provided by a venue such as a pub or club.

SHOW Q33RSA IF 1 AT Q31RS

Q33RSA. REASONS DID NOT TAKE A RIDE SHARE SERVICE WHEN I TRIED TO The last time I did not take a ride share service although I tried to, I did something else because …

SELECT ONE

1, The wait was too long and I gave up
2, I booked a ride share service but it didn't turn up
3, There were no cars available in my area
4, It was a peak or surge pricing period and the quoted cost was too high
5, For some other reason

GO TO Q36RS

SHOW Q33RSB IF 2 AT Q31RS

Q33RSB. REASONS DID NOT TAKE A RIDE SHARE SERVICE WHEN THOUGHT ABOUT IT The last time I did not take a ride share service although I thought about it, I did something else because …

MULTIPLE RESPONSE

1, I thought it would be too expensive
2, I was worried I might have to wait too long for one to come or that a ride share service might not turn up at all
3, A bus arrived before the ride share car
4, A taxi came before the ride share car arrived and I decided to take the taxi
5, For some other reason

SHOW Q36RS FOR FEB WAVE ONLY

Q36RS. MONTH The last time I tried to catch a ride share service or thought about catching a ride share service but in the end did not, was in …

1, December
2, January
3, Another month

Q38RS. DAY The last time I tried to use a ride share service or thought about using a ride share service but in the end did not, was on …

1, Monday to Thursday
2, Friday or Saturday or Sunday before 5am
3, Sunday after 5 am

Q39RS. TIME The last time I tried to use a ride share service or thought about using a ride share service but in the end did not, was …

In the morning (before midday)

1, Between midday and 6 pm
2, Between 6 pm and 10 pm
3, At night (10pm or after but before daylight)

RIDESHARE PROBLEMS

IF 7 IN Q49 GO TO Q41RS

Q40RS. PROBLEMS WITH RIDE SHARE SERVICE USE In the past 12 months

1, I have personally experienced one or more problems either during a ride share service journey or when I was trying to get one
2, I have not experienced a problem during a ride share service journey or when I was trying to get one

If 2 IN Q40RS, GO TO Q42

Q40RSA. IDENTIFY RIDE SHARE SERVICE PROBLEMS The problems I have experienced in the last 12 months with a ride share service include:

MULTIPLE RESPONSE

1, I couldn't get a ride share service when I wanted one
2, I was overcharged
3, The driver did not take the most direct route
4, The driver did not know where they were going
5, The driver refused to take me somewhere after I told them where I was going
6, I felt unsafe because of the way the driver way driving, or the ride share service driver was breaking the road rules
7, The driver was rude, unhelpful, or offensive
9, The price during peak or surge pricing was too high
8, Something else

SHOW Q40RSB IF 8 IN Q40RSA

Q40RSB When I said I had a problem with something else, it was:

OPEN

SHOW Q41RS IF 2 AT Q30RS

Q41RS. REASON HAVEN'T CONSIDERED A RIDE SHARE SERVICE I have not considered taking a ride share service because…

MULTIPLE RESPONSE

1, Driving myself is more convenient
2, They are too expensive
3, The waiting times are too long
4, I am worried the ride share car won't show up after I book one
6, The ride share service might not be safe
7, I don't understand how they work
8, I'm unsure how to get one
9, I did not want to download and install the app for getting a ride share car
10, Against company policy
11, I think the services are exploiting their drivers
12, I did not know that services like this are available
13, I object to the peak or surge pricing policy
5, For some other reason

CAR SHARE USE

****SHOW PREQ48 FOR ALL RESPONDENTS**

PREQ48 Now for some questions about your views on using car share services (for example, driving myself in a car from GoGet, GreenShareCar, Car Next Door or Hertz 24/7).

****DISPLAY PREQ48 ON A SEPARATE PAGE**

Q48B. (USAGE CHANGE) Compared to the previous 12 months, in the last 12 months

1, I used car share services more
2, I used car share services less
3, There has been no change in how often I have used ride share services

SHOW Q48C IF 1 IN Q48B

Q48C (USED CAR SHARE SERVICES MORE) Now some questions about your views on using car share services.
I used car share services more frequently because…

MULTIPLE RESPONSE

1, I find them less expensive than before

2, I have more disposable income

3, I'm going out more

4, Because I know it will be available at the time I have booked it

5, I have less access to alternatives such as a car, or public transport when I need it

6, Because the service for booking car share services is better than for booking taxis

7, Because it has become easier to book a car share service with an app

8, Because I know in advance what it will cost

11, Because they were not available previously or I did not know about them before then

10, For another reason

GO TO QUESTION 48E

Q48D. USE CAR SHARE SERVICES LESS I used car share services less frequently because (can choose more than one)

1, They have become more expensive than they were

2, I have less disposable income

3, I'm going out less

4, Because I find the available cars are too far away, or I can't rely on the car being there when I have booked it

5, I have better access to a car

6, Public transport has improved when I need it

12, I use ride share (such as UberX) instead

13, I use taxis instead

11, I have better access to other transport alternatives

7, Because the booking apps have become worse or are too difficult

10, For another reason

Q48E. FUTURE CAR SHARE USE In the next 12 months, the thing that is most likely to get me to use car share more regularly is:

SINGLE RESPONSE

6, If car share becomes available in [Q3M]

1, If prices get cheaper

3, If booking services improve

7, If they were located closer to me

5, None of these improvements would make me use car share more regularly

IF 7 IN Q47 GO TO Q42

IF 1-6 in Q47 CONTINUE WITH Q48F

Q48F. (CAR SHARE VALUE FOR MONEY) Overall, I think:

RANDOMISE

1, Car share prices are good value for money
2, Car share prices are not good value for money

Q48G. (ABLE TO GET CAR SHARE FOR LAST JOURNEY) When I last tried to get a car share I was

1, Able to get one when I wanted
2, Not able to get one when I wanted

Q48H. (DISTANCE) My most recent car share trip in [Q3M] was…

1, Less than 5 km
2, 5 to under 10 km
3, 10 to under 25 km
4, 25 km to under 50 km
5, 50 km or more

Q48I. (PURPOSE) My main purpose in taking my most recent car share trip in [Q3M] was …

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)
6, Moving items from one place to another
5, Other (such as education related)

Q48J. (REASON FOR CAR SHARE USE) The main reason I took a car share for this journey instead of other transport options was …

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)
3, Cheaper than alternatives
6, More reliable than alternatives
7, Makes different types of vehicle (like a van, ute or luxury car) available
4, I didn't have access to any other transport options
5, Another reason

Q48K. (COST OF THE CAR SHARE USE) The cost of this car share use, including any service fee for electronic payment, was …

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

Q48L (FARE SATISFACTION – CAR SHARE) For the amount I paid for this trip, I was:

1, Very dissatisfied
2, Dissatisfied
3, Slightly dissatisfied
4, Slightly satisfied
5, Satisfied
6, Very Satisfied

HIRE CARS

****SHOW PREQ42 FOR ALL REPSONDENTS**

PREQ42. Now for some questions on hire cars, courtesy transport and community transport

Q42. HIRE CARS In the last six months I have used a hire car with a driver …

1, More than five times a week
2, Three to five times a week
3, One to two times a week
4, Two to three times a month
5, Once a month
6, Less than once a month
7, Not at all

IF 7 IN Q42 GO TO Q51

Q43. REASONS USED A HIRE CAR I used the hire car with a driver instead of a taxi or rideshare because ….

MULTIPLE RESPONSE

1, They are more reliable
2, They are more comfortable
3, They are cheaper
4, Of company policy

Q51. COURTESY TRANSPORT In the last six months I have used courtesy transport provided by a pub, club or other venue

1, More than five times a week
2, Three to five times a week
3, One to two times a week
4, Two to three times a month
5, Once a month
6, Less than once a month
7, Not at all

SHOW Q52 IF 1-6 AT Q51

Q52. REASONS USED COURTESY TRANSPORT I used courtesy transport instead of a taxi or rideshare because ….

MULTIPLE RESPONSE

1, It is more reliable
2, It is more comfortable
3, It is cheaper
4, Other reasons

** OTHER (SPECIFY) QUESTION DROPPED

Q53 USED COMMUNITY TRANSPORT In the last six months I have used community transport (provided in a vehicle other than a taxi)

1, More than five times a week
2, Three to five times a week
3, One to two times a week
4, Two to three times a month
5, Once a month
6, Less than once a month
7, Not at all

SHOW Q54 IF 1-6 AT Q53

Q54. REASONS USED COMMUNITY TRANSPORT I used community transport instead of a taxi or rideshare because ….

MULTIPLE RESPONSE

1, It is more reliable
2, It is more comfortable
3, It is cheaper
4, Other reasons

** OTHER (SPECIFY) QUESTION DROPPED

Q44. NUMBER OF VEHICLES The number of registered vehicles, counting both private and company owned, used by my household is …

1, None
2, 1
3, 2
4, 3 or more

Q45. USUAL TRAVEL I usually get around by …

MULTIPLE RESPONSE

1, Driving myself using a company or private vehicle
2, Driving myself using a GoGet car or other car sharing service
3, Getting a lift
4, Public transport
5, Cycling or walking
6, Taking a taxi
7, Using rideshare (such as UberX)
8, Using community transport
9, Using courtesy transport provided by a pub, club or other venue

OTHER DEMO

Q5DEM HOUSEHOLD INCOME 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 Taverner 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, Don't want to say

Q6DEM DISABLITY I …

1, Have a physical disability
2, Do not have a physical disability

IF CODE 2 AT Q6DEM GO TO Q99END

Q7DEM WHEELCHAIR I can ...

1, Catch any type of taxi or rideshare
2, Only use a wheelchair accessible taxi or rideshare

Q8DEM TAXI SUBSIDY I get payment assistance for taxis from the

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

Q99END TERMINATE SURVEY

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

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

14. APPENDIX 2: Weighting the data

The weight (Wt) for a cell is the ratio of the target for that cell to the actual obtained frequency.

The targets were calculated by multiplying the estimated population proportion in a cell as a proportion of the column total population by the total sample size for that location.

Targets were rounded to the nearest whole number. Due to this rounding some of the obtained total target frequencies vary slightly from the actual total frequencies.

The effect of applying the weights on the distribution of replies to Q1 (Frequency of taxi use in the past six months) is minor as shown in Table 3.

Table 2. Calculating case weights

	Urban Sydney			Other Urban			Country		
SUB GROUP	TARGET	ACTUAL	Wt= T/A	TARGET	ACTUAL	Wt= T/A	TARGET	ACTUAL	Wt= T/A
Males 16-29	224	159	1.4088	63	24	1.8333	31	4	2.3333
Males 30-39	195	199	0.9800	37	19	1.1875	18	17	
Males 40-49	181	181	1.0000	39	38	0.7143	19	16	1.1875
Males 50-59	155	154	1.0064	40	46	0.8723	19	21	0.9048
Males 60 plus	217	225	0.9644	68	93	0.9860	31	57	0.5263
TOTAL MALES	**972**	**918**		**247**	**220**		**118**	**115**	
Females 16-29	224	237	0.9451	54	65	0.9048	32	18	1.7778
Females 30-39	201	237	0.8481	39	45	0.8511	19	14	1.3571
Females 40-49	189	191	0.9895	42	46	0.9556	21	13	1.6154
Females 50-59	162	165	0.9818	40	43	1.0250	21	38	0.5526
Females 60 plus	252	273	0.9231	78	85	0.0127	39	50	0.7600
TOTAL FEMALES	**1,028**	**1,103**		**253**	**284**		**132**	**133**	
TOTAL SAMPLE	**2,000**	**2,021**		**500**	**504**		**250**	**251**	

"Target" reflects estimated population distribution.

NOTE: Cells have been combined where necessary to avoid very large weights that can results when cell frequencies are extreme.
Using the age ranges above, the Sydney and Other Urban samples are very close to the expected distribution based on the population.
The Country sample requires more adjustment even with the males 16-29 and 30-39 cells combined. In all samples, the greatest discrepancies occur for males aged under 30 and females aged under 30. These segments are always the most difficult to obtain in voluntary survey samples.

Table 3. Frequency of point to point transport use, weighted and unweighted Urban Sydney

SUB GROUP	Urban Sydney taxi use		Urban Sydney ride share use		Urban Sydney car share use	
	Wtd %	Uwtd %	Wtd %	Uwtd %	Wtd %	Uwtd %
More than five times a week	3.8	3.6	2.2	2.1	2.1	2.4
Three to five times a week	4.3	4.1	3.5	3.2	2.7	2.4
One to two times a week	8.2	7.8	5.8	5.4	4.0	4.0
Two to three times a month	9.5	9.3	7.0	6.7	4.1	6.8
Once a month	9.2	9.2	5.4	5.4	4.1	4.8
Less than once a month	25.3	25.8	10.6	10.7	6.0	18.3
Not at all	39.7	40.3	65.6	66.5	77.0	61.4
Number of cases	**2,000**	**2,021**	**2,000**	**2,021**	**2,000**	**2,021**

The differences between the weighted and unweighted distributions are generally small. Even when rounded to whole percentages, the differences are $\leq$ 1 percentage point.

This analysis confirms that there is insufficient bias in estimates due to the Urban Sydney sample not matching the population age by gender distribution to justify the loss of precision that results from weighting the data.

Table 4. Frequency of point to point transport use, weighted and unweighted Other Urban

SUB GROUP	Other Urban taxi use		Other Urban ride share use		Other Urban car share use	
	Wtd %	Uwtd %	Wtd %	Uwtd %	Wtd %	Uwtd %
More than five times a week	0.8	1.0				
Three to five times a week	1.8	1.4	1.6	1.0	0.8	0.6
One to two times a week	3.8	3.8	2.8	2.2	0.8	1.0
Two to three times a month	6.4	5.6	2.0	1.8	2.4	1.8
Once a month	7.8	8.3	5.4	4.2	0.8	0.8
Less than once a month	23.4	21.8	9.4	8.3	6.2	4.0
Not at all	56.0	58.1	78.8	82.5	89.0	91.9
Number of cases	**500**	**504**	**500**	**504**	**500**	**504**

The differences between the weighted and unweighted distributions are generally small. Even when rounded to whole percentages, the differences are ≤ 1 percentage point except for the estimates of the prevalence of use of each service. The difference for taxis is 2 points, for ide share is 3 points and for car share is three points In each case the weighted estimates are higher than the unweighted, due to the highly weighted young and young male segments being more likely to use each mode.

The estimated prevalence of taxi use is 44% (weighted) against 42% (unweighted). For ride share the estimates are 21% (weighted) and 17% (unweighted). For car share, 11% (weighted) and 8% (unweighted).

This analysis confirms that there is insufficient bias in estimates due to the Other Urban sample not matching the population age by gender distribution to justify the loss of precision that results from weighting the data.

Table 5. Frequency of point to point transport use, weighted and unweighted Other Urban

SUB GROUP	Country taxi use		Country ride share use		Country car share use	
	Wtd %	Uwtd %	Wtd %	Uwtd %	Wtd %	Uwtd %
More than five times a week	3.6	2.4	0.8	0.4	0.4	0.4
Three to five times a week	2.8	2.4	0.8	0.4	0.8	0.4
One to two times a week	4.8	4.0	1.6	0.8	2.4	1.6
Two to three times a month	6.8	6.8	3.2	2.0	1.6	0.8
Once a month	4.8	4.8			0.4	0.8
Less than once a month	18.1	18.3	4.4	3.6	5.2	3.6
Not at all	59.0	61.4	89.2	92.8	89.2	92.4
Number of cases	**250**	**251**	**250**	**251**	**250**	**251**

The differences between the weighted and unweighted distributions are generally small. Even when rounded to whole percentages, the differences are ≤ 2 percentage point except for the overall estimates of the prevalence of use of each mode. The weighted estimates are higher due to the highly weighted younger (and especially younger male) segments being more likely to make use of each mode.

The estimated prevalence of taxi use is 41% (weighted) against 39% (unweighted). For ride share the estimates are 11% (weighted) and 7% (unweighted). For car share, 11% (weighted) and 8% (unweighted).

This analysis suggests that there is insufficient bias in estimates due to the Country sample not matching the population age by gender distribution to justify the loss of precision that results from weighting the data.

15. APPENDIX 3: Variations in waiting time

Sections 6.1 to 6.4 show that the mode of obtaining a taxi has a major impact on the waiting time, with those who book the next available taxi having the longest waiting times, and those who book for a particular time having the shortest waiting time.

In this appendix we explore the impact of other characteristics of the trip on waiting time.

These include:

- The origin of the trip
- The destination of the trip
- The day of the week
- The time of the day

While there is an effect from day of week suggesting that it is more difficult to get a taxi on Friday and Saturday than on other days of the week, the overwhelming influence on waiting time appears to be the how the taxi was obtained.

15.1. Waiting time and origin

In 2013 it appeared that some modes of obtaining a taxi in Sydney showed differences in waiting time as a function of origin.

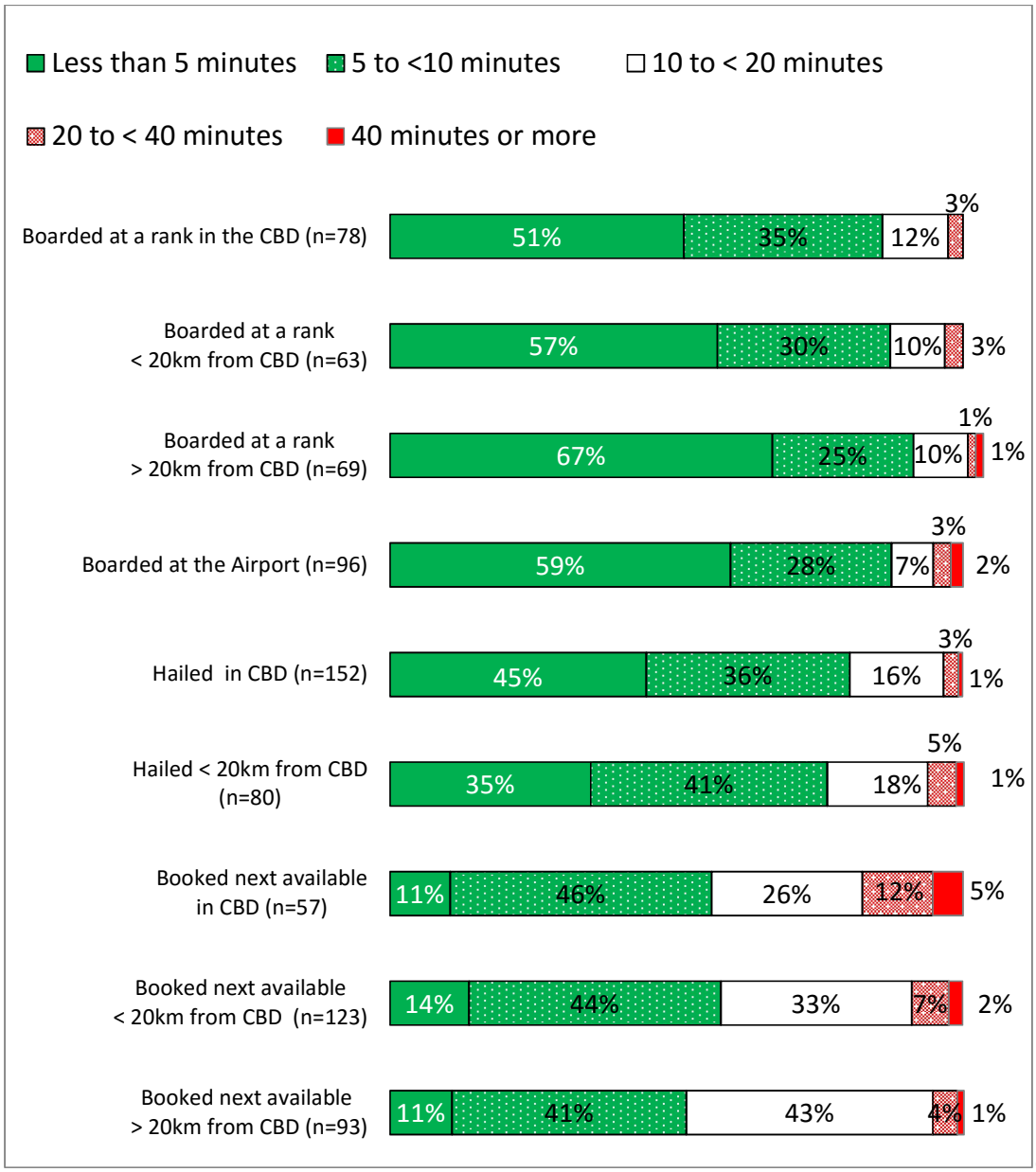
Figure 73 shows the breakdowns for 2016. As in previous surveys, the sample bases for some of these breakdowns are relatively small. Those with less than 20 responses are excluded. Results for those with less than 50 should be treated with great caution.

The 2016 results confirm the consistent finding in all surveys to date of longer waiting times reported when the next available taxi was booked for every starting point. In general, the method used to obtain the taxi is more important than where the taxi is obtained.

There are no substantial or significant differences by the location or the origin of the trip within methods. Booking the next available consistently produced the longest waiting times followed by hailing a taxi.

For all methods, waiting times of over 10 minutes are not common in 2016, if hailing the taxi or taking a taxi at a rank, (reported by 12% to 24%), but are much more often reported by those who booked the next available taxi (by 42% -48%). Waiting times of 20 minutes or more are rare (reported by 2% to 6% for hailing a taxi or taking one at a rank, but by 5% to 18% if the next available taxi is booked).

Figure 73. Waiting time by origin and how taxi was obtained Urban Sydney 2016



Q14. On my most recent taxi trip, I started my journey …
Q23a. At the rank I had to wait …[IF Q22 = At a taxi rank]
Q23b. By hailing a taxi from the street I got a taxi in … [IF Q22 =Hailed/waved down]
Q24a. After the taxi was booked, I had to wait … [IF Q22= The "next available" taxi]
NOTE: Treat with caution where n<50. Where n<20, result not shown.

15.2. Booked taxi arrival time performance and origin

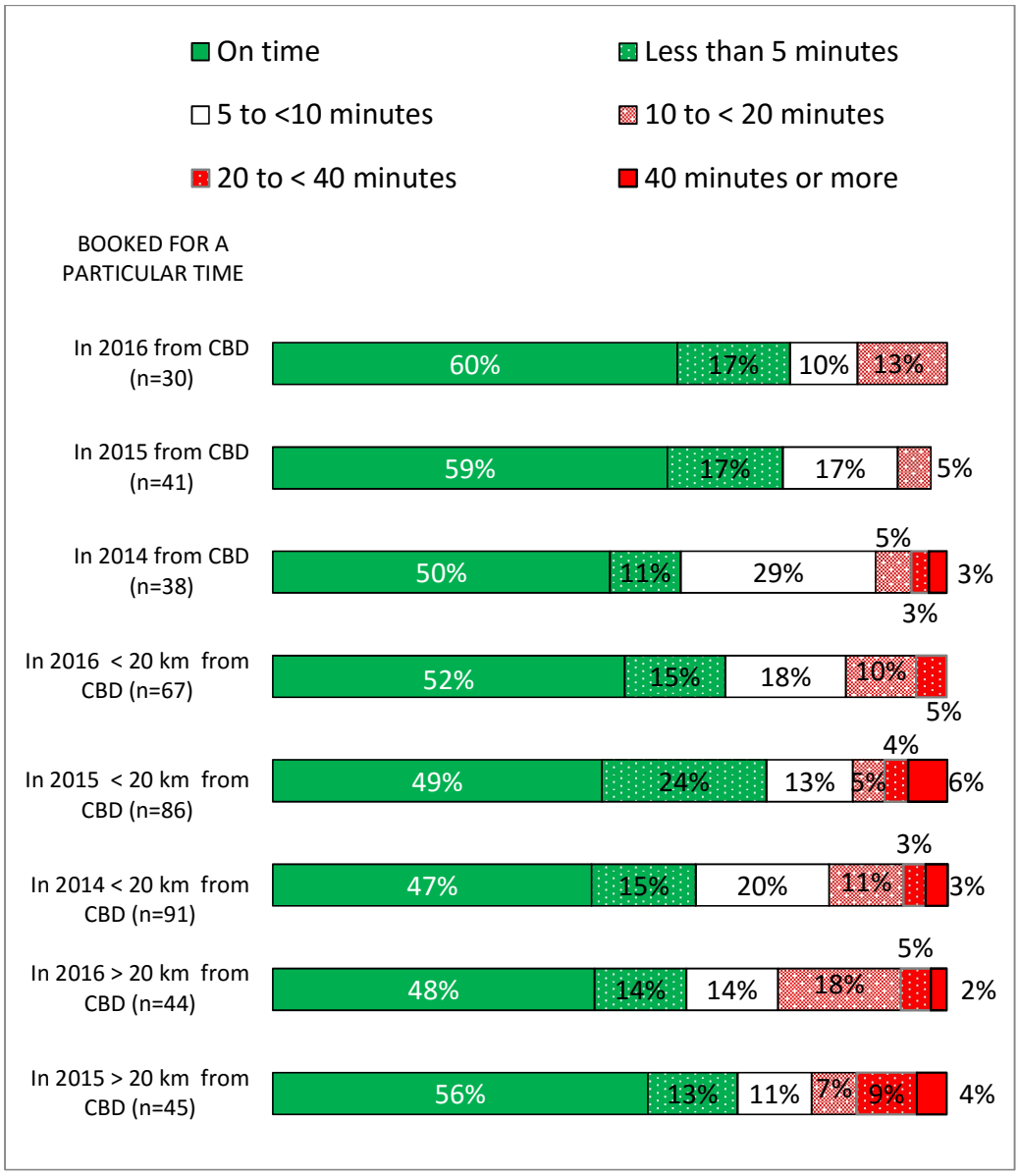
Figure 74 shows booked arrival time performance broken down by the origin of the journey.

Taxis booked for a particular time at the airport no longer showed the best performance as had been apparent in the two previous surveys, but the samples are very small (n=17 in 2016 and 2015 and n=33 in 2014) so the result might be quite unreliable. In 2016, performance for this combination is very close to the results for the CBD.

The percentage that arrived on time or less than five minutes late at other locations in 2014, 2015 and 2016 when booked for a particular time ranged from 61% to 77%. The percentage that waited less than five minutes for boarding at a taxi rank at any location and for hailing a taxi at any location in any year are generally lower than those for users who had booked for a specific time. In 2016, the only exception was for taxis taken more than 20kms from the CBD when 67% of n=69 taken at a rank involved a wait of less than 5 minutes, while 62% of those booked for a particular time (n=44) arrived on time or no more than 5 minutes late. It appears that booking for a specific time produces lower waiting times. This effect was also evident in 2013.

Given the consistent finding over four successive surveys we can confidently conclude that waiting time is lowest when a taxi is booked for a particular time. However, booking a taxi for a specific time is not available in many situations where the time that the taxi is needed cannot be predicted.

Figure 74. Taxi arrival performance and origin Urban Sydney 2014 to 2016



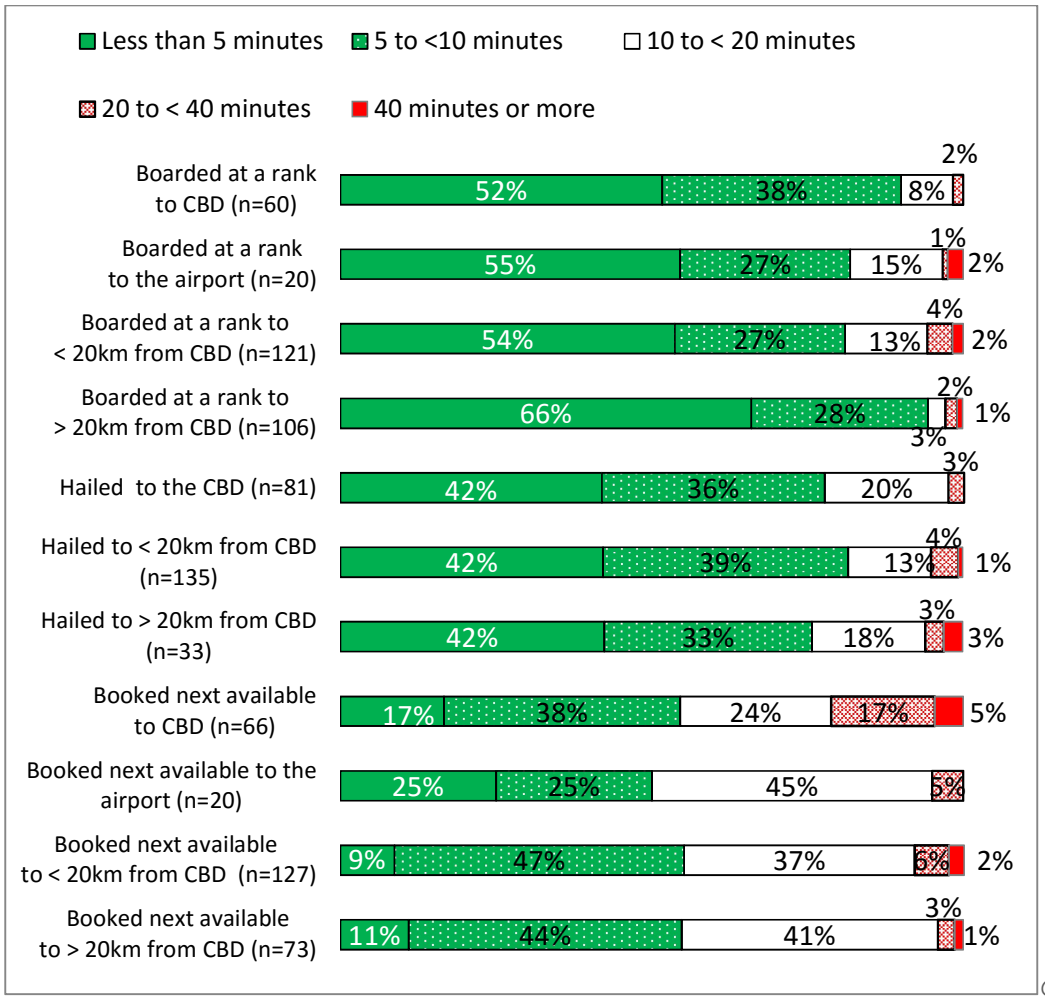
Q14. On my most recent taxi trip, I started my journey …
Q24b. The taxi arrived …
IF Q24 = booked a taxi for a particular time
NOTE: Treat with caution where n<50

15.3. Waiting time and destination

Figure 75 shows the variations in waiting time by how the taxi was obtained and the destination. Those going to the airport who hailed the taxi are not shown due to the low sample base and the other two groups going to the airport have very low bases so the results need to be treated with great caution (both n=20).

Waiting time is much less likely to be short when the next available taxi was booked. There is no evident pattern for the destination to affect waiting time.

Figure 75. Waiting time by destination and how taxi obtained: Urban Sydney 2016



Q15. In my most recent taxi trip in Sydney, I got out of the taxi …
Q23a. At the rank I had to wait …
Q23b. By hailing a taxi from the street I got a taxi in …
Q24a. (Booked … the next available taxi and) Had to wait …
NOTE: Treat with caution where n<50. Where n<20, result not shown.

The patterns found in the 2015 and 2014 data have not been repeated.

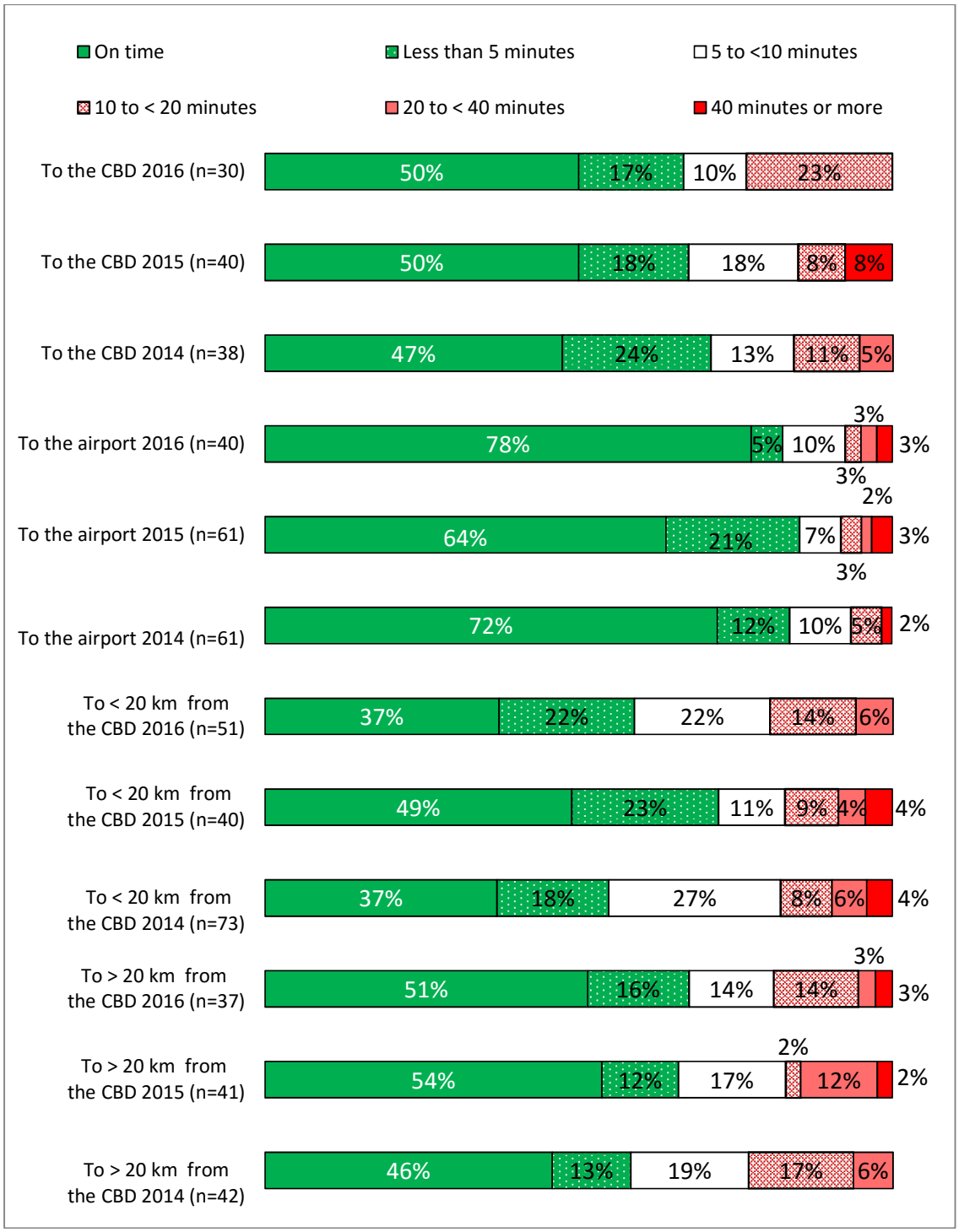
15.4. Arrival time performance and destination

The most notable repeated variation in arrival on time or within 5 minutes of the booked time is that trips to the airport in all three years are more likely than other trips to be on time or involve a wait of less than 5 minutes after the booked time (see Figure 76).

Other variations are not consistent from across the years which is perhaps due to the relatively small sample bases (most <50).

The other key finding is that apart from those going to the airport, the destination has little effect on whether a taxi booked for a particular time arrive on time or within five minutes of the booked time.

Figure 76. Taxi arrival performance and destination Urban Sydney 2016, 2015 and 2014



Q15. In my most recent taxi trip in Sydney, I got out of the taxi …
Q24a. I booked … a taxi for a particular time
Q24b. The taxi arrived …
NOTE: Treat with caution where n<50. Where n<20, result not shown.

15.5. Waiting time and day of week

The effect of day of week on waiting time in 2015 for Urban Sydney users is broken down for each mode of getting a taxi in Figure 77.

While 20 of those asked about their most recent taxi trip reported taking a taxi at a rank on a Sunday (after 5am) only 10 reported hailing a taxi during the day on Sunday (after 5am) and only 10 cases reported booking the next available taxi on a Sunday. The results for hailing and booking the next available on Sunday after 5am are not shown due to the low sample bases.

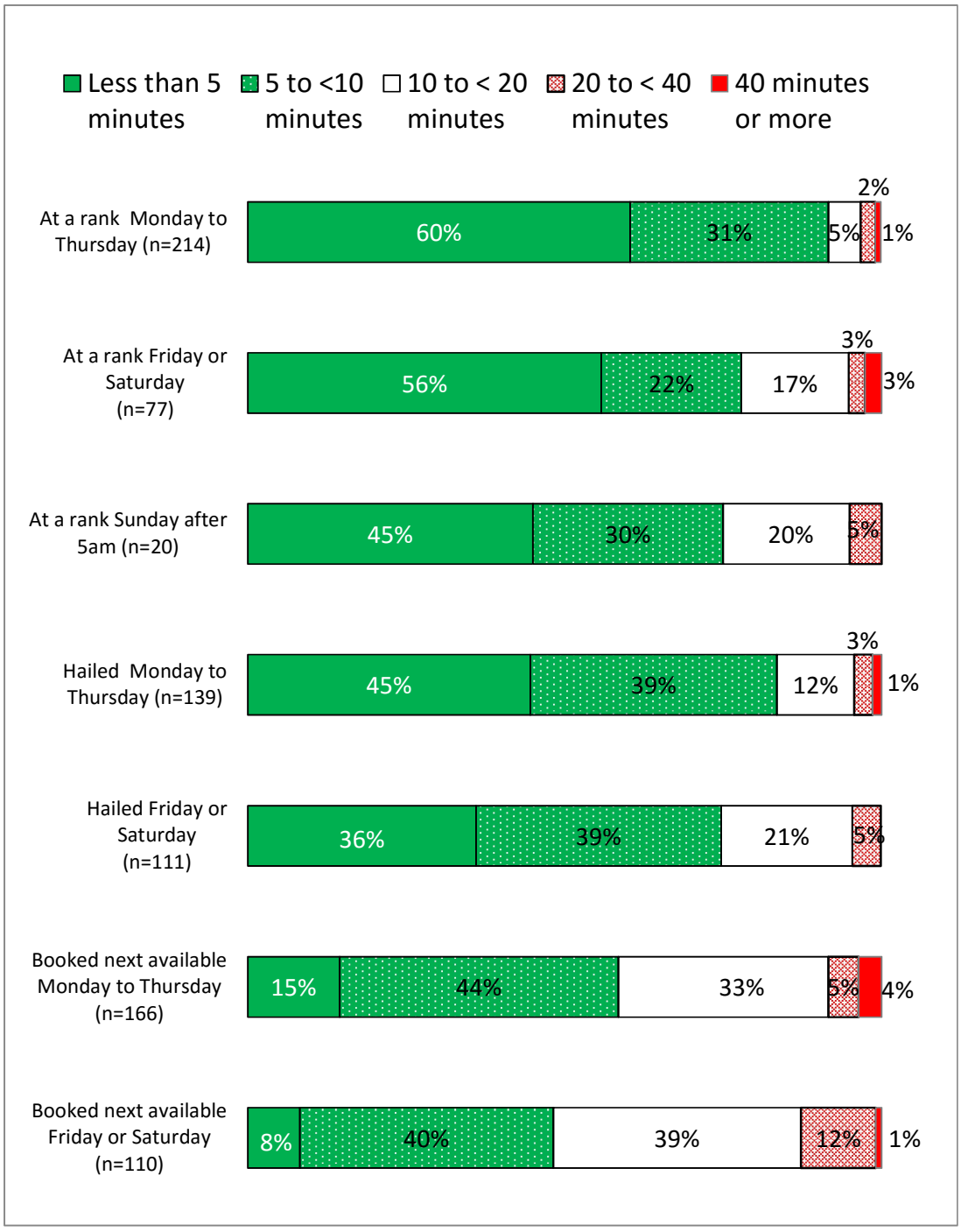
As in 2014 and 2015, waiting times under five minutes and waiting times under ten minutes are less likely to be reported for taxis taken on Friday or Saturday than for those taken Monday to Thursday. While the differences within particular modes (taken at a rank, hailed, or booked next available) are not statistically significant, the consistency of the differences suggests that, as in previous years, waiting times are longer on Friday and Saturday than on other days of the week.

As in 2014 and 2015, waiting times are significantly less likely to be under 5 minutes when the next available taxi was booked regardless of the day of the week. Waiting time is much more likely to be 10 to 40 minutes when the next available taxi is booked than if the taxi is hailed from the street or obtained at a taxi rank.

In this survey (as in all previous surveys) the effect on waiting times of booking the next available taxi is much larger than any effect of day of week. Booking the next available taxi results in longer waiting times than taking a taxi at a rank or hailing a taxi in the street.

It is reasonable to conclude that waiting times for taxis hailed from the street and probably when boarded at a rank are less likely to be under ten minutes on Friday or Saturday than on Monday to Thursday. In 2015 and 2014, there was a difference in waiting times of under five minutes, but not for waiting times of under 10 minutes.

Figure 77. Waiting time by how taxi was obtained and day of week, Urban Sydney 2016



Q18. My most recent taxi trip in Sydney was on …
Q22. I got the taxi … At a taxi rank / Hailed/waved down on the street / [Booked next available]/ [Booked for a particular time – any booking mode]
Q23a. At the rank I had to wait …
Q23b. By hailing a taxi from the street I got a taxi in …
Q24A. I booked … the next available taxi
NOTE: Treat with caution where n<50. Where n<20, result not shown.

15.6. Arrival time performance and day of week

Figure 78 shows 2016, 2015 and 2014 Urban Sydney arrival time performance for taxis booked for a specific time broken down by the day of the week.

Results for Sunday are based on too few cases and so Sunday results are not shown.

There is a significant and substantial difference in on time performance for bookings made for a particular time between those made on Monday to Thursday (60% on time in 2016 and 2015, 65% in 2014) and on Friday or Saturday (42% on time in 2016, 44% in 2015, 41% in 2014).

The higher proportion arriving more than 10 minutes late on Friday and Saturday found in 2014 but not repeated in 2015 is again evident in 2016 (22% on Friday or Saturday, 13% on Monday to Friday in 2016).

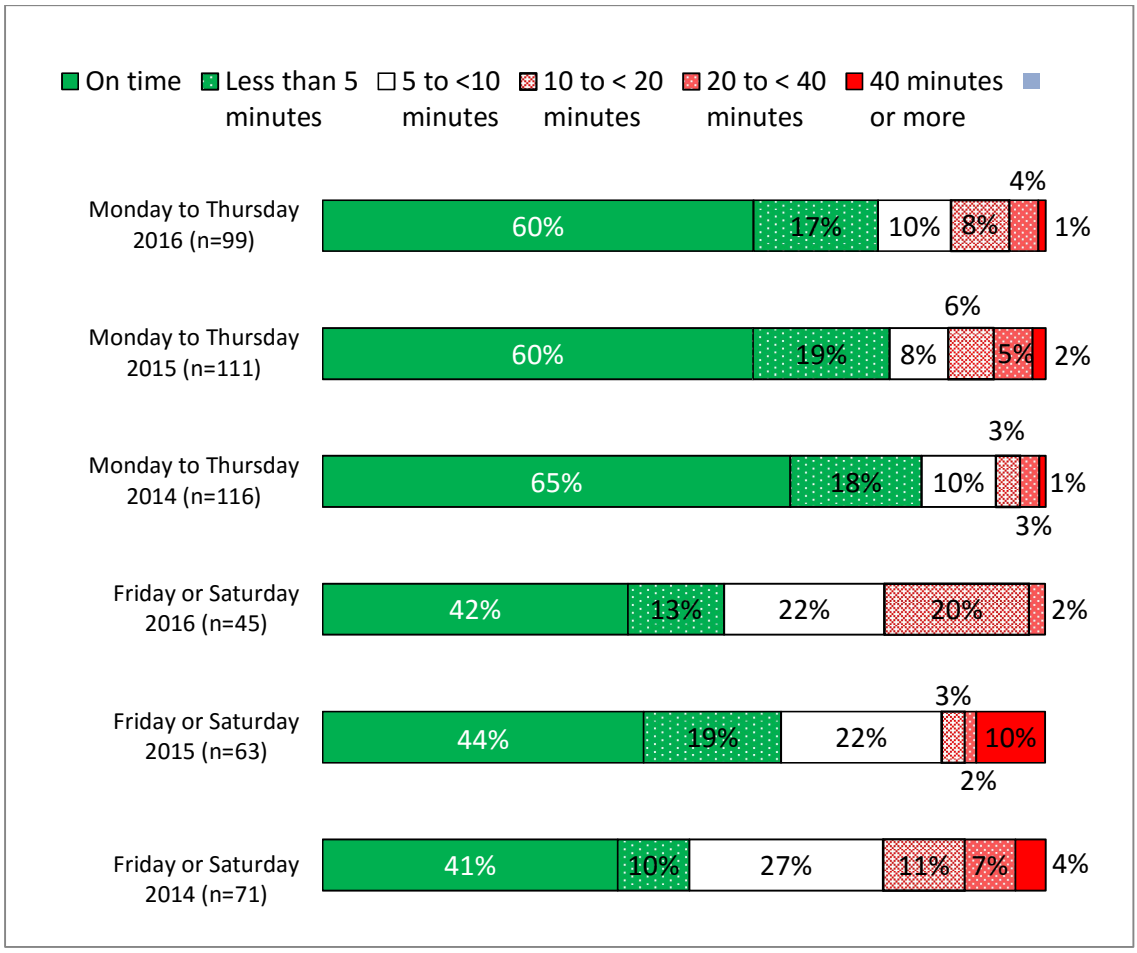
When a taxi is booked for a particular time, the best outcome (not available for other ways of getting a taxi) is on time arrival. Comparisons to the other modes need to combine on time arrival with arriving less than five minutes late.

In 2016, the percentage arriving on time or within five minutes for taxis booked for a particular time is 56% (Friday and Saturday, n=45) and 77% (Monday to Thursday, n=99). The percentage obtained within five minutes for taxis hailed or obtained at a rank on Monday to Thursday in 2016 is 60% (at a rank), 45% (hailed) and even lower when the next available taxi is booked (15%). On Friday to Saturday, 56% waited less than five minutes at a rank, 36% if they hailed the taxi and 8% if they booked the next available. Short waiting times appear much less common for those who book a taxi for a particular time than those who obtain their taxi at a rank or by hailing a passing taxi. However, in every survey year, short waiting times are more common on Monday to Thursday than on Friday to Saturday regardless of how the taxi is obtained.

It appears that:

- On every day, the time waiting to get a taxi is shorter for those booked for a specific time
- Waiting times are more likely to exceed ten minutes on Friday to Saturday than on Monday to Thursday

Figure 78. Taxis booked for a particular time - arrival performance by day of week Urban Sydney 2014 to 2016



Q14. On my most recent taxi trip, I started my journey …
Q24. I booked … a taxi for a particular time
Q24b. The taxi arrived …
NOTE: Treat with caution where n<50. Where n<20, result not shown.

15.7. Waiting time and time of day

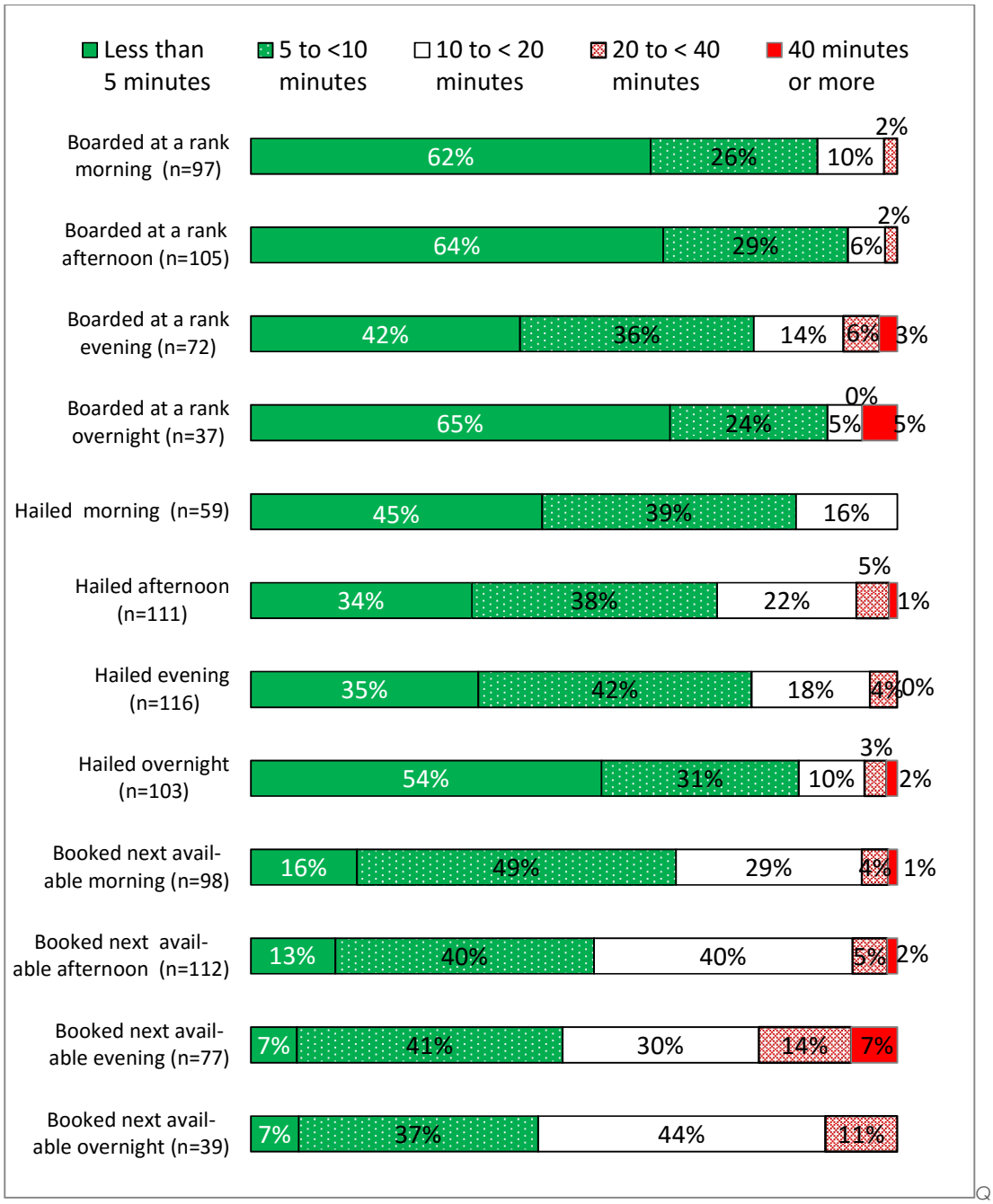
Figure 79 shows the variations in waiting time by how the taxi was obtained and the time of day in 2016.

There are no significant differences in waiting time by time of day. The only clear trend is for waiting times if the next available taxi is booked to increase with those taken in the morning the lowest and those taken overnight the longest.

This effect of booking in the evening or overnight on waiting time was also found in 2015 and 2014.

Short waiting times are significantly less likely and longer waiting times significantly more likely when the next available taxi is booked, regardless of time of day. This replicates the effect found in previous surveys and confirms that the mode of obtaining the taxi matters more than the time of day when the taxi is sought.

Figure 79. Waiting time by time of day and how taxi obtained Urban Sydney 2016



Q19. My most recent taxi trip in Sydney was … morning (day break to before midday) / afternoon (midday to before 6pm) / evening (6pm to before 10 pm) / overnight (10pm to daybreak)
Q23a. At the rank I had to wait …
Q23b. By hailing a taxi from the street I got a taxi in …
Q24a. I booked … the next available taxi
NOTE: Treat with caution where n<50. Where n<20, result not shown.

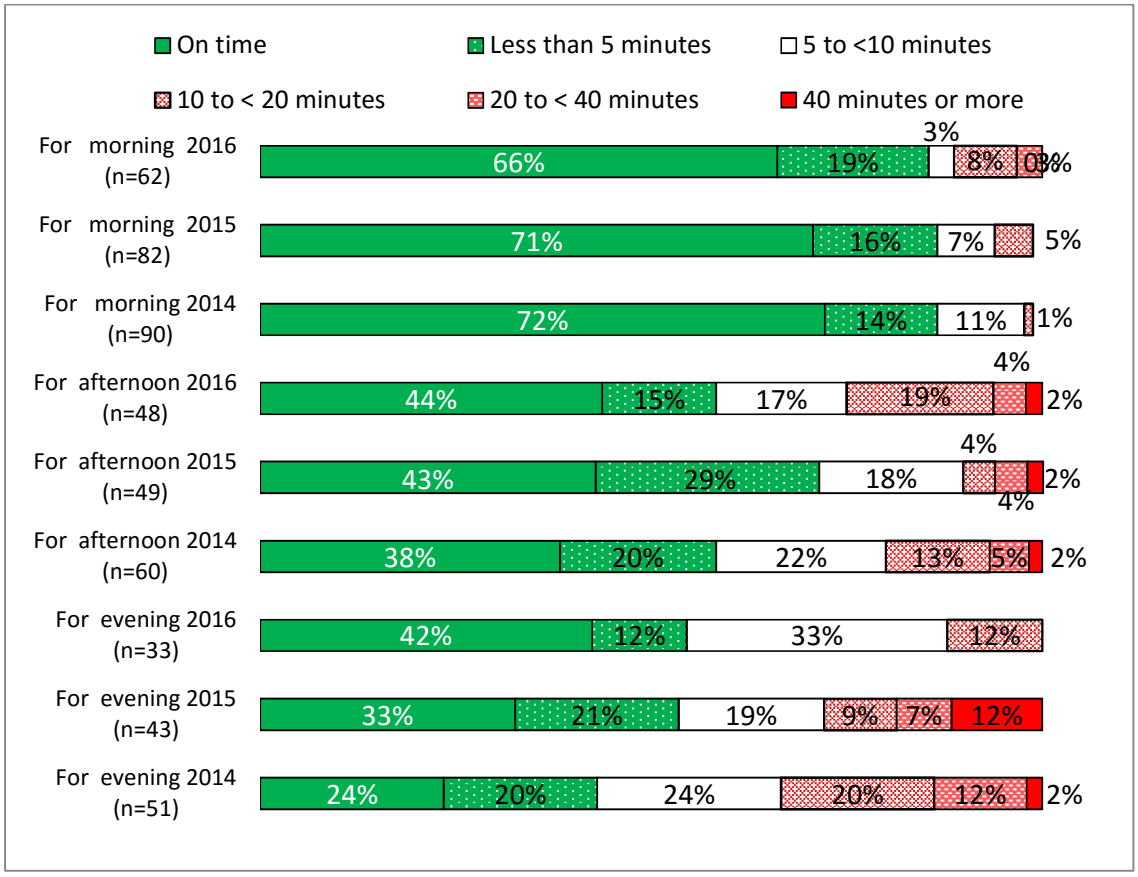
15.8. Arrival time performance and time of day

In 2016, 2015 and 2014, on time arrival for taxis booked for a particular time appears somewhat lower for taxis booked for the afternoon (midday to before 6pm) and lowest for those booked for the evening (6pm to 10pm), as can be seen in Figure 80. The differences between morning and other times are statistically significant.

Other apparent variations are not consistent or significant.

Results for overnight bookings are not shown due to low sample bases (under 20).

Figure 80. Taxi arrival performance and time of day booked Urban Sydney 2015 and 2014



Q24b The taxi arrived … BY
Q19. My most recent taxi trip in Sydney was … morning (day break to before midday) / afternoon (midday to before 6pm) / evening (6pm to before 10 pm) / overnight (10pm to daybreak)

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