



Report on:

Survey of Taxi Use

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Taverner Contact: Dr Don Porritt

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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 2,200 Urban Sydney adults (2,198 achieved), 500 Other Urban adults (drawn from urban areas of Newcastle, Wollongong, Gosford and Wyong, with 516 achieved) and 250 Country adults (drawn from a list of Country towns with 20 or more taxi licences, 248 achieved) to establish:

- ✧ The prevalence and frequency of taxi use in the previous six months
- ✧ Reasons for use (among users) or non-use (among non-users)
- ✧ 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 journey for those who had used a taxi in the past six months
- ✧ Experience with, and evaluations of the service among 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 due to physical disability, and in particular use of a wheelchair
- ✧ Use of and reasons for using a hire car, a car-sharing service and a ride-sharing service
- ✧ Prevalence of seeking to use and being unable to obtain a taxi.

A total of 2,962 completed questionnaires were obtained, 2,198 from Urban Sydney, 516 from the Other Urban locations and 248 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 closely match the population age by gender distribution showed that this had a very small effect on the rated

frequency of taxi use, and it was decided to analyse the results using unweighted data.

From the replies we estimate that:

- ✧ 60% of Urban Sydney adults had used a taxi in the previous six months compared to 45% of Other Urban and 36% of Country adults
- ✧ 25% in Urban Sydney had done so less than once a month, compared to 23% of Other Urban and 17% of Country adults
- ✧ 15% did so at least once a week, and 8% more than twice a week in Urban Sydney compared to 9% and 4% in Other Urban and 9% and under 6% in the Country towns
- ✧ Thus taxi use is significantly 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
- ✧ Taxi use in Urban Sydney is significantly higher in 2015 (60%), 2014 (58%) and 2013 (58%) than in 2012 (55%) but has been stable since 2013

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
- ✧ 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. Both these alternatives, as well as hire cars, show an increase in usage compared to previous years, although these are not yet as widely used as taxis even in the Urban Sydney region

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

One area of change is the use of alternative forms of what can be called individualised or door to door transport. In addition to hire cars, the 2015 and 2014 surveys asked about use of car share and ride share schemes, and the 2015 survey asked about use of courtesy transport and community transport services. Use of hire cars, car sharing and ride sharing services all appear to be increasing (hire cars from 18% in 2014 to 21% in 2015, car sharing from 13% to 17%, and ride sharing from 11% to 19%). Using a courtesy transport service and using a community transport service in the past six months are as common as using a hire car service in 2015 (all 21%). Use of paid alternative forms of door to door transport (hire car, car share and ride share services) are each associated with more frequent taxi use, while use of free alternatives (courtesy and community transport services) are not.

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 2014, 2013 and 2012.

2. Background & Introduction

IPART commissioned Taverner Research to conduct an online survey of a representative sample of 2,200 Urban Sydney adults to update benchmark data about access to and use of taxis in the Sydney transport region. The benchmark data were collected in October/November 2012, with subsequent waves in October/November 2013 and 2014.

In the November 2014 and 2015 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.

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 benchmark survey. 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.

Where possible, comparisons are reported between the 2015, 2014, 2013 and 2012 results for Urban Sydney. For 2015, results are also compared between Urban Sydney, Other Urban and Country locations, and to results for these locations in 2014

3. Methodology

3.1. The survey questions

The survey items were designed to probe:

- ✧ 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 within the past six months
- ✧ For those who had used a taxi in the past six months, for their most recent 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 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
- ✧ Whether they had used a hire car with a driver in the past six months, and characteristics of the most recent such trip
- ✧ Whether they had used a car share, ride share, courtesy transport or community transport service in the past six months and (for each service used) their reasons for doing so
- ✧ 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

Additional items in the 2015 survey asked about use of and reasons for using car sharing services, ride sharing services, courtesy transport services and community transport services.

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.

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. 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 13 day period (from 4 November to 16 November) 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 2,962 usable replies was obtained, 2,198 in Urban Sydney, 516 in the Other Urban and 248 in Country locations. The distribution of age and gender in each area 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, with males 40-49 somewhat over-represented. 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) are shown in Appendix 2. The Q1 results demonstrate the very limited impact of weighting.

Table 1. Population targets and actual sample

SUB GROUP	Urban Sydney		Other Urban		Country	
	TARGET	ACTUAL	TARGET	ACTUAL	TARGET	ACTUAL
Males 16 to 19	67	45	20	4	9	0
Males 20 to 29	216	210	46	32	22	4
Males 30 to 39	215	231	38	32	18	17
Males 40 to 49	188	188	40	56	19	16
Males 50 to 59	165	164	41	47	19	21
Males 60 plus	231	232	70	71	30	57
TOTAL MALES	1,082	1,070	255	242	117	115
Females 16 to 19	64	64	14	15	9	4
Females 20 to 29	213	215	42	48	23	14
Females 30 to 39	215	219	40	47	19	14
Females 40 to 49	192	196	43	45	21	13
Females 50 to 59	170	170	41	40	21	38
Females 60 plus	263	265	81	79	38	50
TOTAL FEMALES	1,117	1,129	261	274	131	133
TOTAL SAMPLE	2,199	2,199	516	516	248	248

"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 age 16-19 (under-sampled)

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, and 40-49 (over-sampled)

Males aged 60+ (over-sampled)

Females aged 16-29, 30-39, 40-49 and 50-59 (all under-sampled)

Females aged 60 or more (over-sampled)

After exploring the effect of weighting it was concluded that no weighting was required.

As statistical precision and the power to detect differences between sub-groups is greater for unweighted data, the unweighted results are used throughout this report.

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 trip taken, and
 - the most recent trip for which a taxi was considered but not taken
- ✧ By selected demographics including:
 - disability
 - receipt of subsidised vouchers and
 - whether a wheelchair was used

Differences that are statistically significant and meaningful are shown in the graphs of the distribution of replies.

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

Throughout, 2015 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.

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.

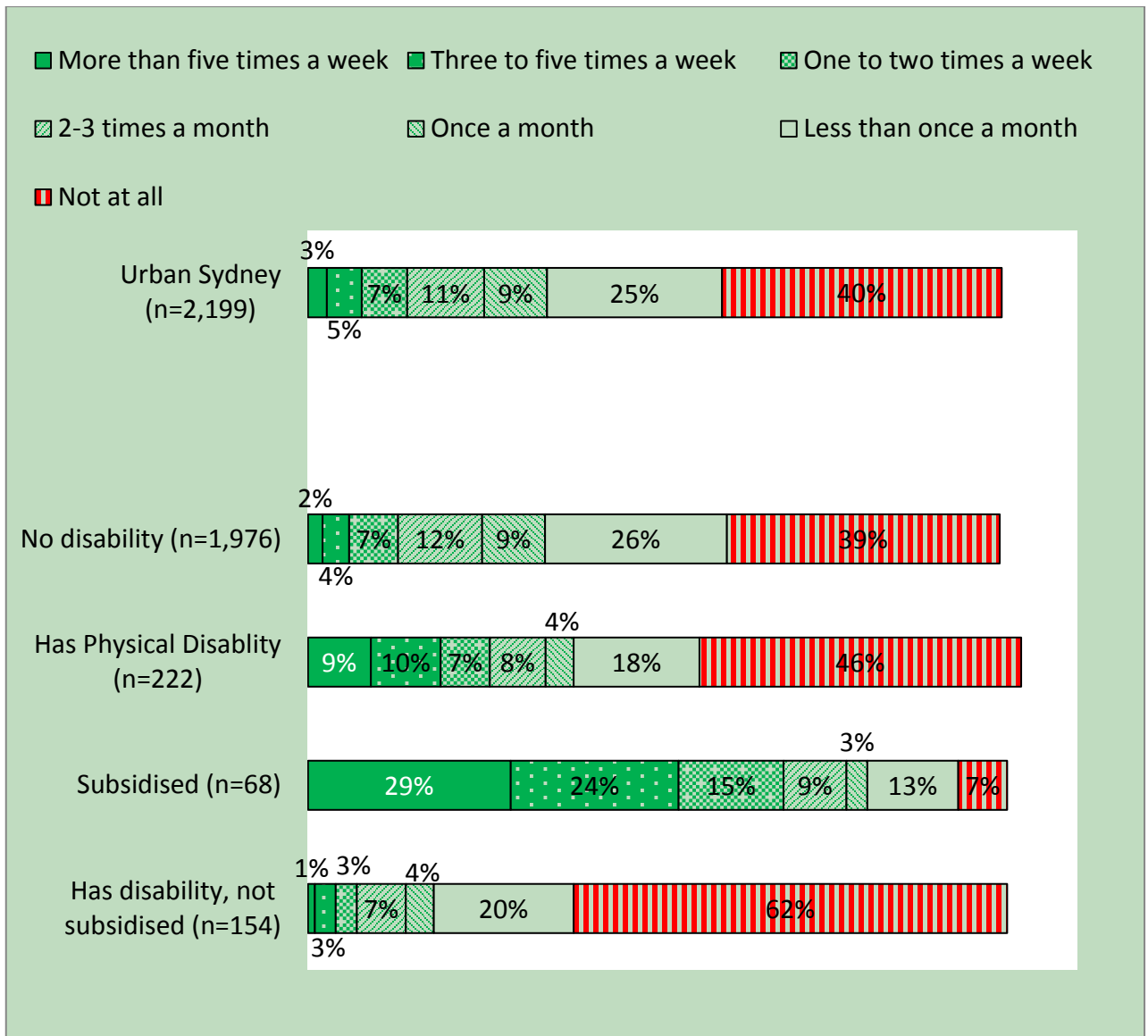
Task	Date
Project commissioning	16 October 2015
Questionnaire finalised, set up for online administration and tested	21 October 2015
Pilot survey (N=200 plus, Urban Sydney) carried out	30 October to 2 November 2015
Main field work carried out	4 November to 16 November 2015
Draft report submitted	4 December 2015
Final report submitted	15 January 2016

4. Results: Taxi use

4.1. Frequency of use

As shown in Figure 1 below, over half the Urban Sydney sample (60%) had used a taxi in the past six months, but 25% (four in ten of the taxi users) had done so less than once a month. Only 15% had used a taxi at least once or twice a week and only 8% more than once or twice a week.

Figure 1. Frequency of taxi use in the past six months: 2015
Urban Sydney by disability and whether subsidised

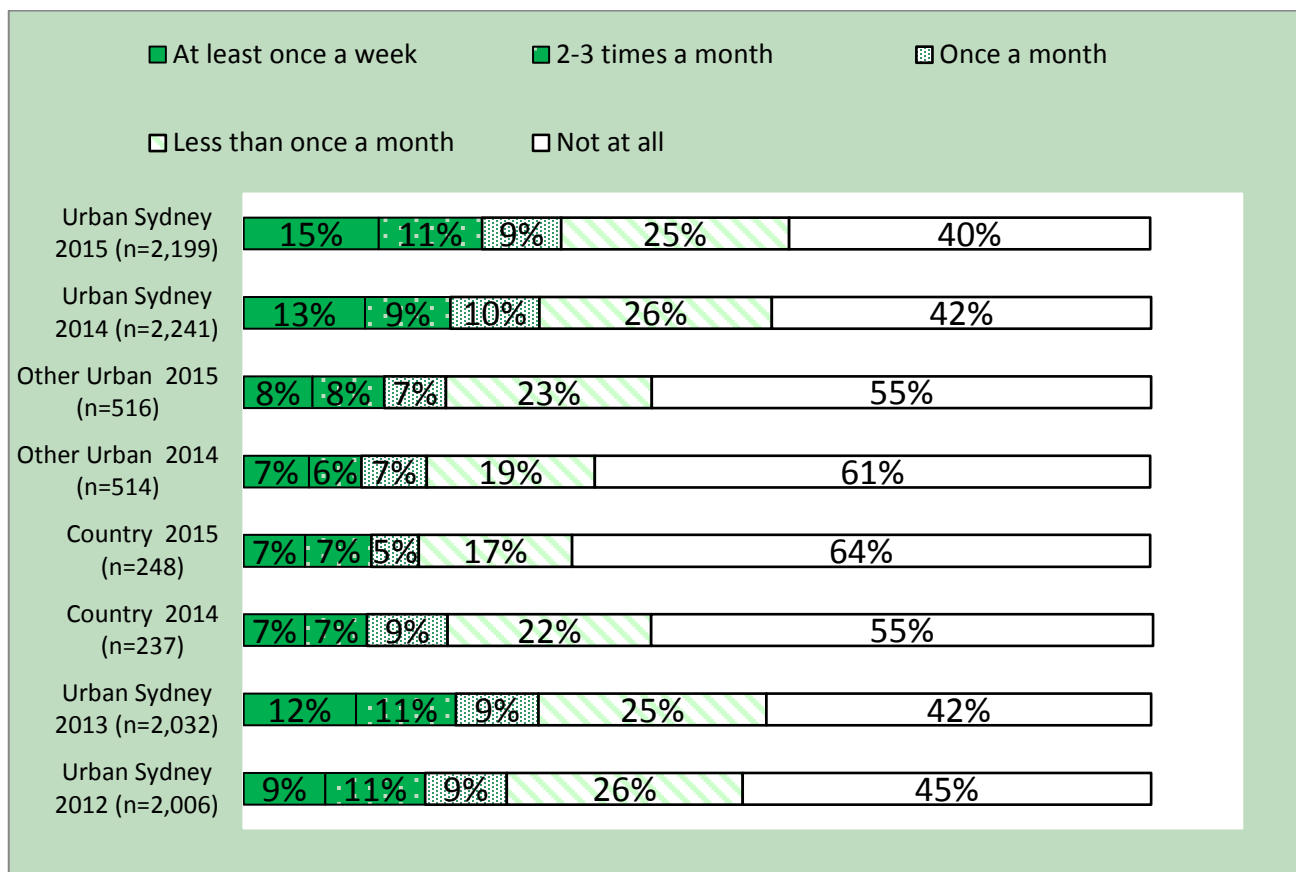


Q1. In the last six months I caught a taxi in Sydney....

As shown in Figure 2:

- ✧ 60% of Urban Sydney adults had used a taxi in the previous six months compared to 45% of Other Urban and 36% of Country adults
- ✧ 25% in Urban Sydney had done so less than once a month, compared to 23% of Other Urban and 17% of Country adults
- ✧ 15% did so at least once a week, and 8% more than twice a week in Urban Sydney compared to 8% and 4% in Other Urban and 7% and under 6% in the Country towns

Figure 2. Frequency of taxi use in the past six months: 2015 and 2014 segments and 2013 and 2012



Q1. In the last six months I caught a taxi...

NOTE:

In 2013 to 2015 the scale was 5+ times a week / 3-4 times a week / 1-2 times a week / 2-3 times a month / Once a month / Less than once a month / Not at all

In 2012, the scale was More than once a week / Once a week / 2-3 times a month / Once a month / Less than once a month / Not at all

Thus taxi use is significantly 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.

Change in use since 2012

Differences in the distribution of taxi use frequency in the Urban Sydney region from 2012 to 2015 are small but statistically significant. Specifically:

- ✧ the percentage using a taxi at least once a week is significantly lower in 2012 than in 2014 and 2015, suggesting a small increasing trend over time
- ✧ the percentage using a taxi at least 2 to 3 times a month is also significantly lower in 2012 (20%) than the 23% in both 2013 and 2014 and 26% in 2015
- ✧ The difference between 2012 and the later years in the percentage who never use a taxi is not quite statistically significant ($p=0.06$)

Given the changes in the response categories for those using a taxi at least once a week from 2012 to 2013 (see Note to Figure 2) the differences between 2012 and the more recent years might be effects of the rating scale rather than real changes in frequency of use. They are in any case very small changes.

Effects of disability and access to subsidy

In 2015, (see Figure 1) those in Urban Sydney with a disability ($n=222$) are significantly more likely than those without a disability to use a taxi five or more times a week (9% compared to 2%), but the difference in the proportion that had used a taxi (54% compared to 61%), while not statistically significant ($p=.07$), is in the opposite direction.

The base number of users with a disability receiving a subsidy is low ($n=68$). Of those receiving a subsidy, 29% used taxis more than five times a week and a total of 68% used a taxi at least once a week compared to 7% of the $n=154$ with a disability who do not receive a subsidy and 14% of those with no disability ($n=1,976$). Despite the small sample base of respondents with a disability who received a subsidy, the differences are statistically significant. As a similar effect was found in both 2014 and 2013, we can reasonably conclude that people with a disability are only more likely than others to use a taxi if the disabled person receives a subsidy for taxi use and less likely to do so if they do not receive a subsidy.

Only 17 Urban Sydney respondents out of 222 with a disability (and 26 out of 349 in the total sample) 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 10 in Urban Sydney (and 14 in the total sample) reported use at least once a week, 4 in Urban Sydney (and 6 in the total sample) reported that they had not used a taxi at all in the past six months and the others reported 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 a week (54% compared to 17%), perhaps because they are more likely to have a subsidy for use (73% compared to 21%).

Usual mode of transport

Those who do not usually get about by car are (as would be expected) significantly more likely to have used a taxi in the past six months:

- ✧ 53% of $n=1,334$ in Urban Sydney who usually get about by car
- ✧ 61% of $n=859$ in Urban Sydney who do not usually get about by car

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

- ✧ 40% of $n=400$ in Other Urban locations who usually get about by car
- ✧ 62% of $n=116$ in Other Urban locations who do not usually get about by car
- ✧ 30% of $n=207$ in Country locations who usually get about by car
- ✧ 66% of $n=41$ in Country locations who do not usually get about by car

Urban Sydney respondents who usually rely on public transport are also significantly more likely to have used a taxi:

- ✧ 64% of $n=1,076$ in Urban Sydney who usually rely on public transport
- ✧ 56% of $n=1,122$ in Urban Sydney who do not usually rely on public transport

Other Urban respondents who usually rely on public transport and those who do not are somewhat more likely to have used a taxi, but the difference is not statistically significant:

- ✧ 60% of n=133 in Other Urban locations who usually rely on public transport
- ✧ 40% of n=383 in Other Urban locations who do not usually rely on public transport

In Country locations, the few who usually rely on public transport (n=22) also appeared more likely to have used a taxi (70% compared to 33% of n=225 who do not rely on public transport, $p < .001$).

Differences in taxi use between those who usually get a lift and others, between those who usually cycle or walk and others, between those who usually use community transport and others and those who usually use a courtesy vehicle and others are much smaller (1 to 6 percentage points) and not statistically significant. The total sample is used for these comparisons as all these options are available in all locations.

The n=82 in the total 2015 sample who reported they **usually** drive themselves using a GoGet or other car sharing service are very likely to have used a taxi (95% compared to 55% of other respondents) and to do so frequently (65% at least once or twice a week compared to 12% of others). It is possible that these respondents had counted the use of the car sharing service as taxi use when answering Q1 about frequency of taxi use. They are also significantly more likely ($p < .001$) to report using a taxi at least once a week than respondents who reported taking a taxi as their usual mode of travel (63% of n=82 compared to 40% of n=265). There is little overlap between the two groups (n=12 in the total sample, 15% of those reliant on car sharing services and 5% of those reliant on taxis).

Use of other individual paid modes

The n=367 Urban Sydney residents (18%) who had used a car sharing service in the past six months are more likely to have used a taxi (93%) than those who had not used any car sharing service (54%), and there is a clear association between making more frequent use of a car sharing service and making more frequent use of a taxi.

The n=409 Urban Sydney residents (19%) who had used a ride sharing service in the past six months are also much more likely

(91%) to have used a taxi than are those who had not used a ride sharing service (53%) with a clear trend for those who more often used a ride sharing service to also more often use a taxi.

Users of car sharing are much more likely than other Urban Sydney residents to have used a ride sharing service (83% of n=367 compared to 6% of n=1,831 who had not used a car sharing service). There is a strong association between more frequent use of a car sharing service and more frequent use of a ride sharing service. It appears the users of these two relatively new options substantially overlap, with many using both services. However, the overlap was even stronger in 2014, so the two types of service might be gradually differentiating.

The n=451 Urban Sydney residents (21%) who had used a hire car in the past six months are much more likely to have used a taxi (93%) and to have done so at least once a week (24%) than those who had not used a hire car (52% used and 13% once a week or more).

Overall, use of taxis is associated with use of other forms of paid individual transport, but not with use of free individual alternatives.

Annual household income

Reported household income also affected taxi use.

Figure 3 shows the income distribution of the sample. Almost one fifth of the Urban Sydney sample (18%) indicated that they either could not say what the household's annual gross income is (5%) or did not want to answer (14%) – quite a typical result and almost identical to the results obtained in 2013 and 2014.

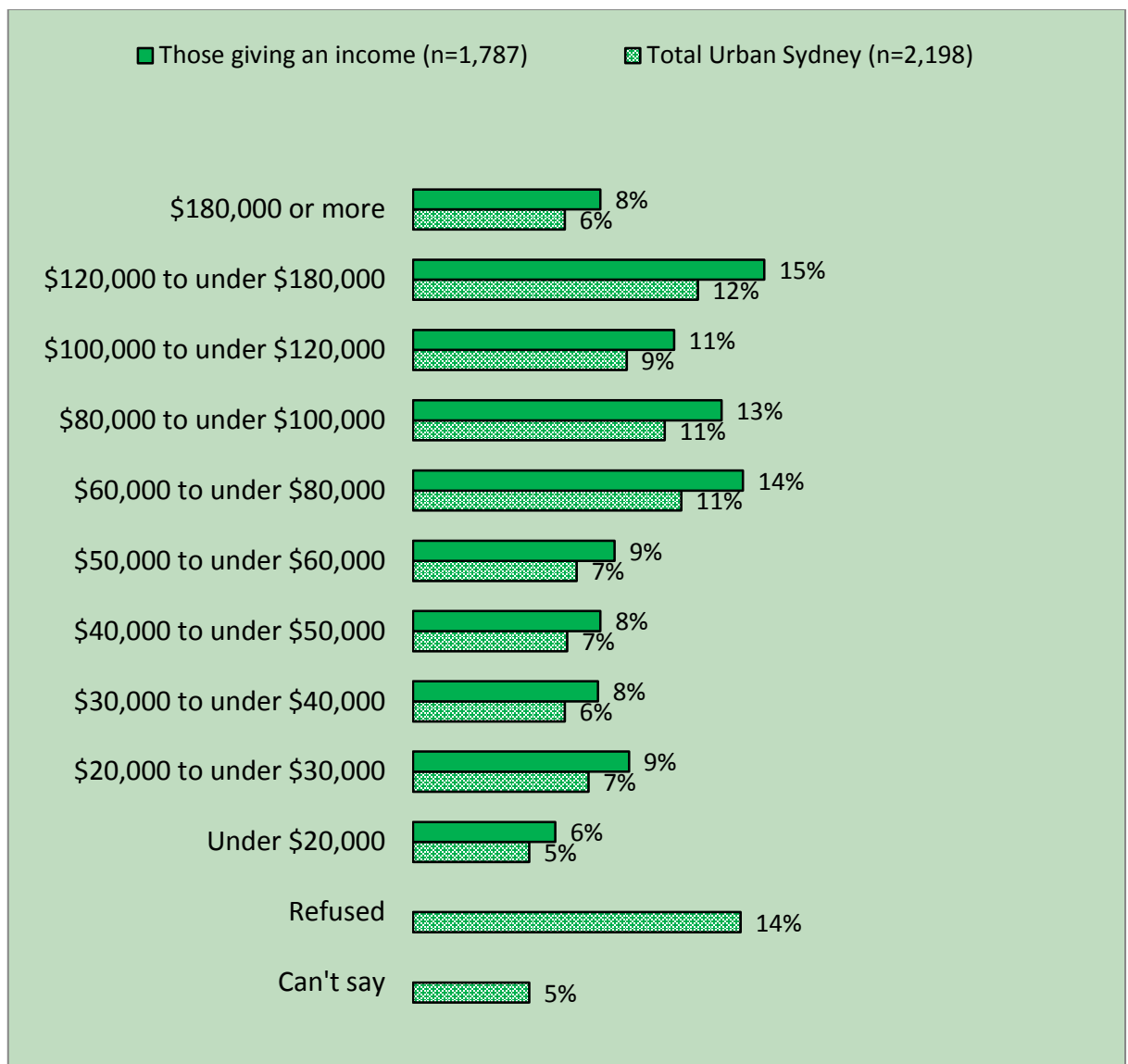
Even in the national census a substantial proportion does not give income data.

Eight percent of those giving an income in Urban Sydney indicated it is \$180,000 or more, 23% that it is \$120,000 or more, and 34% that it is \$100,000 or more. These proportions reporting high incomes are slightly higher than were obtained in 2013. Available population income distribution data are not directly comparable.

Reported household income in Other Urban and Country regions is lower than in Urban Sydney. Excluding Don't know and Refused replies:

- ✧ 34% report \$100,000 or more in Urban Sydney and 15% under \$30,000
- ✧ 22% report \$100,000 or more and 28% under \$30,000 in Other Urban
- ✧ 13% report \$100,000 or more in Country and 33% under \$30,000

Figure 3. Reported household annual income of Urban Sydney residents, 2015



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.

Although not completely regular, the trend is clearly for the proportion of Urban Sydney residents that had used a taxi in the past six months to increase with reported household income from:

- ✧ 49% of n=107 with incomes under \$20,000 pa to
- ✧ 71% of n=405 with incomes of \$120,000 pa or more

This difference is little changed from the result in 2014.

As incomes increase, the percentage reporting use at least once a week also rises:

- ✧ 13% in the three lowest household income bands (all under \$40,000 pa, n=410)
- ✧ 21% in the next two bands (\$40,000 to under \$60,000 pa, n=294)
- ✧ 17% in the next three bands (\$60,000 to under \$120,000, n=678)
- ✧ 19% for those reporting \$120,000 or more (n=405)

Similarly to the results in 2014, Urban Sydney taxi use among those who could not report their household income (46% of n=108) and for those who declined to report their household income (48% of n=303) is somewhat lower than in the total sample, and similar to the levels reported by those with incomes in the under \$40,000 range, suggesting those who do not report their income tend to have lower household incomes.

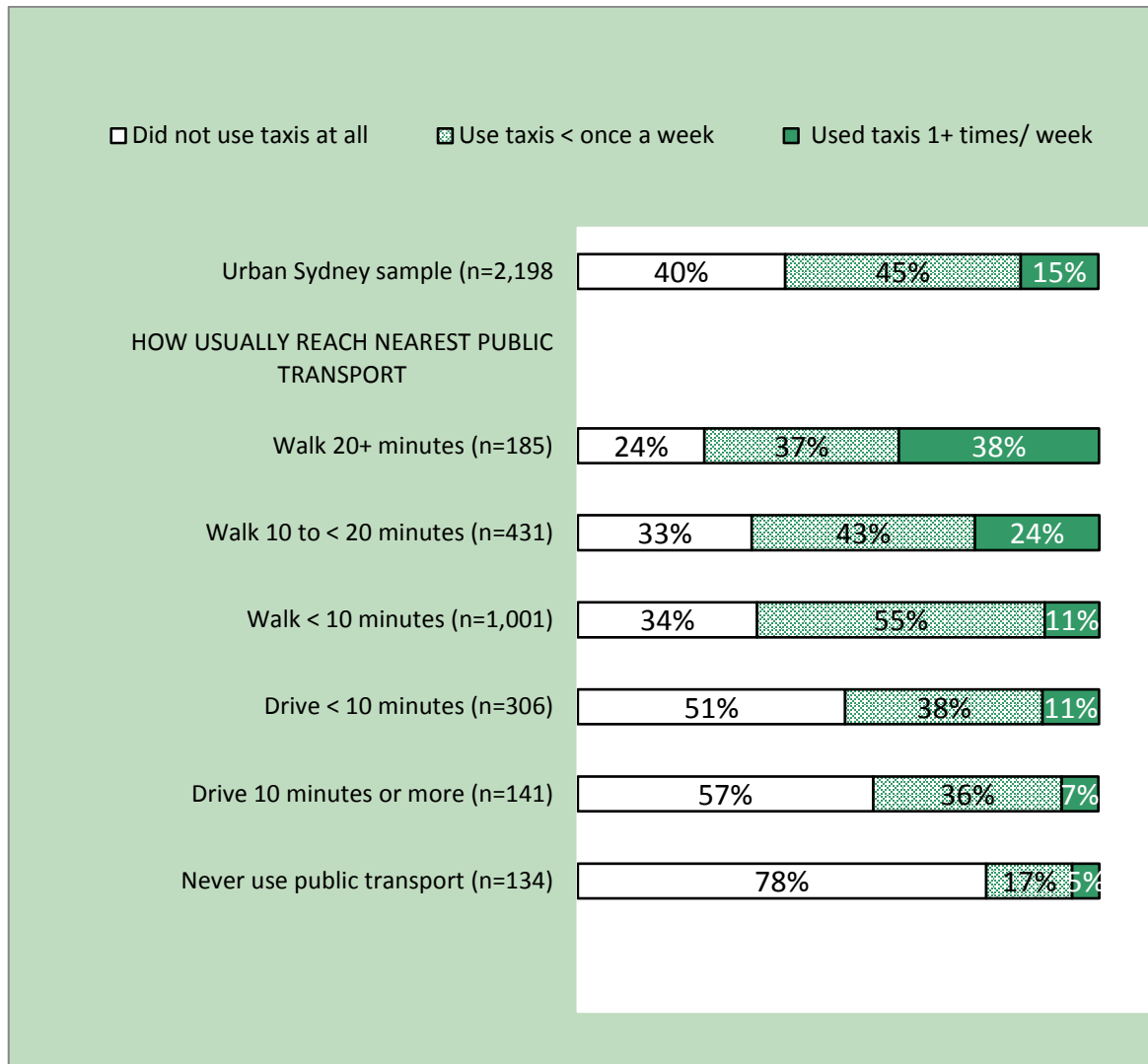
Accessibility of public transport

Use of taxis is more common and more frequent in Urban Sydney for those who have to travel further or use a car to reach the nearest public transport. However, those who reported they never use public transport (mostly those who use a car) are least likely to use a taxi, and least likely to do so at least once a week. The detailed results are shown in Figure 4.

For those who would usually walk to the nearest public transport, use of taxis in the past six months increases from 66% to 76% as the time taken to make the walk increases from under 10 minutes to 20 minutes or more. Use of taxis at least once a week increases from 11% to 38%. Usually using a car or getting a lift to reach the nearest public transport is associated with more use of taxis – 49% if the drive is under 10 minutes, and 43% if the drive takes 10 minutes or more. Use of taxis at least

once a week is also lower for those who usually drive to reach their nearest public transport, being reported by 11% of those who have to drive less than 10 minutes and 7% of those who have to drive more than 10 minutes.

Figure 4. Taxi use by accessibility of public transport in Urban Sydney 2015



Q46 To get to my nearest train, bus, or ferry stop I would usually ...

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 reported 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.

Those with three or more cars in the household are significantly less likely than those with fewer cars to have used a taxi at least twice a month. Use of a taxi at least twice a month is reported by:

- ✧ 28% of n=290 with no car in the household
- ✧ 28% of n=987 with one car in the household
- ✧ 26% of n=681 with two cars in the household
- ✧ 20% of n=240 with three or more cars in the household

Summary

As found in 2012, 2013, and 2014, the 2015 results confirm that income has an effect on frequency of taxi use. Further, for people with a disability, use is common and more frequent if they receive a subsidy, and well below use by other members of the adult population if they do not. Income and effective price both matter.

How people usually reach their nearest public transport has an effect on use and frequency of use of taxis. Those who usually walk are slightly more likely to use taxis and to use taxis more often if they have to walk more than 20 minutes. Those who usually reach their nearest public transport by car are less likely to use a taxi at all, are less likely to do so at least once a week, and less likely to do so if they have to drive ten minutes or more to reach their nearest public transport stop. Those who do not use public transport are least likely to report using taxis, presumably because they are more likely to be using a car.

Users of free individual transport services (community transport, and courtesy transport) are no more likely than others to use a taxi. Users of paid forms of individual transport (ride share, car share and hire car services) are all more likely to use taxis than those who do not use such alternatives to public transport, and the more often they reported use of the paid alternative, the more often they reported use of taxis. This might in part be due

to respondents considering these modes of transport to be use of a taxi.

Having two or three or more cars in the household somewhat reduces the incidence of taxi use and the frequency of use.

4.2. 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 2015, 2014 and 2013, and for the total Other Urban and Country samples in 2015 and 2014, with a break within the Urban Sydney 2014 sample by reported frequency of use in the past six months are all shown in Figure 5.

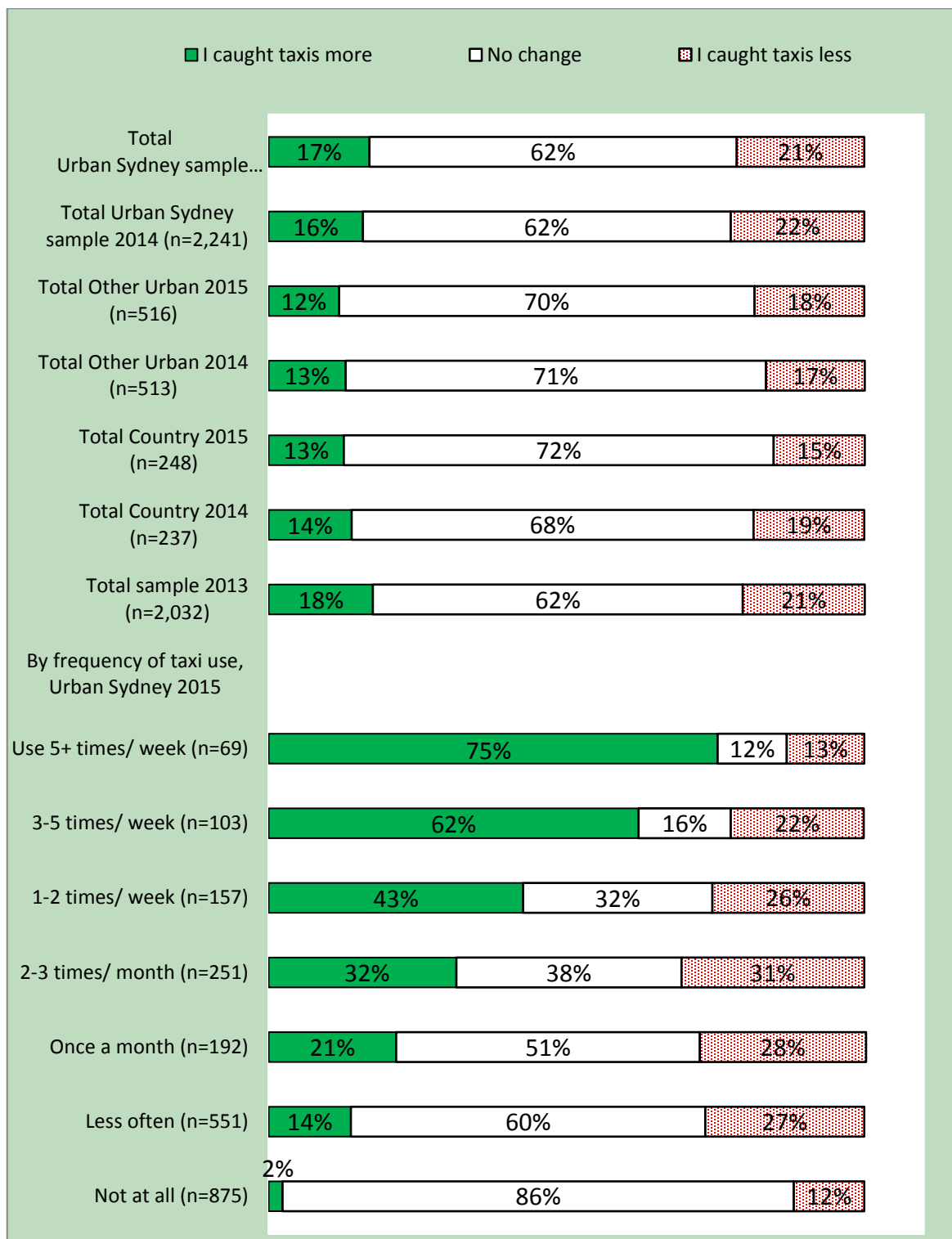
Respondents are slightly more likely to report their use of taxis has decreased than to report their use of taxis has increased. The difference of four percentage points in the percentage reporting increased use in urban Sydney (17%) and decreased use (21%) is not statistically significant. This pattern is consistently seen in the 2013 and 2014 Urban Sydney results and the Other Urban and Country locations in 2014 and 2015. It is likely that slightly more people believe they have reduced taxi use than believe they have increased taxi use.

There are no differences between the samples large enough to suggest real differences over time or by location.

As was found in 2013 and 2014, the balance between increased and decreased use is strongly related to the reported frequency of use. The relatively small segment that reported using a taxi more than once a month in the past six months are more likely to report increased than decreased use, while those using once a month or less are more likely to report decreased use. Those reporting no use in the past six months are the most likely to report no change in use. Reporting no change in use is least common for those using most frequently, and most common for those reporting little or no use.

Thus it appears that 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.

Figure 5. Change in frequency of taxi use by frequency of use



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
 BY

Q1. In the last six months I caught a taxi....

4.3. Reasons for change in use

The n=355 in 2013, the n=355 in 2014 and the n=371 in 2015 in Urban Sydney 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 6).

Need (going out more or reduced access to alternatives) is the main reason for increased use followed by less access to alternatives (up in 2015) and increased capacity to pay. Results for the 2015 Other Urban and Country samples are similar.

A range of improvements in the service provided by taxis are also endorsed but at much lower levels. One quarter to one third had a reason not included in the prompted list.

The sample sizes for those who reported increased use in Other Urban (n=61) and Country (n=31) locations limited confidence in the findings. In summary, less access to alternatives such as a car (32-33%) and going out more (21% and 39%) are the most prominent reasons. Those outside Sydney are also more likely to say they had other reasons not included in the listed options (39% and 29%).

Figure 7 shows that for Urban Sydney respondents in all three years (2013 to 2015), increased cost is the most widely endorsed reason for reduced use followed by 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.

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

The sample sizes for those surveyed in Other Urban and Country locations in 2015 are small enough to limit confidence in the reliability of the results (n=95 for Other Urban and n=38 for Country). For both, the most widely selected reasons are:

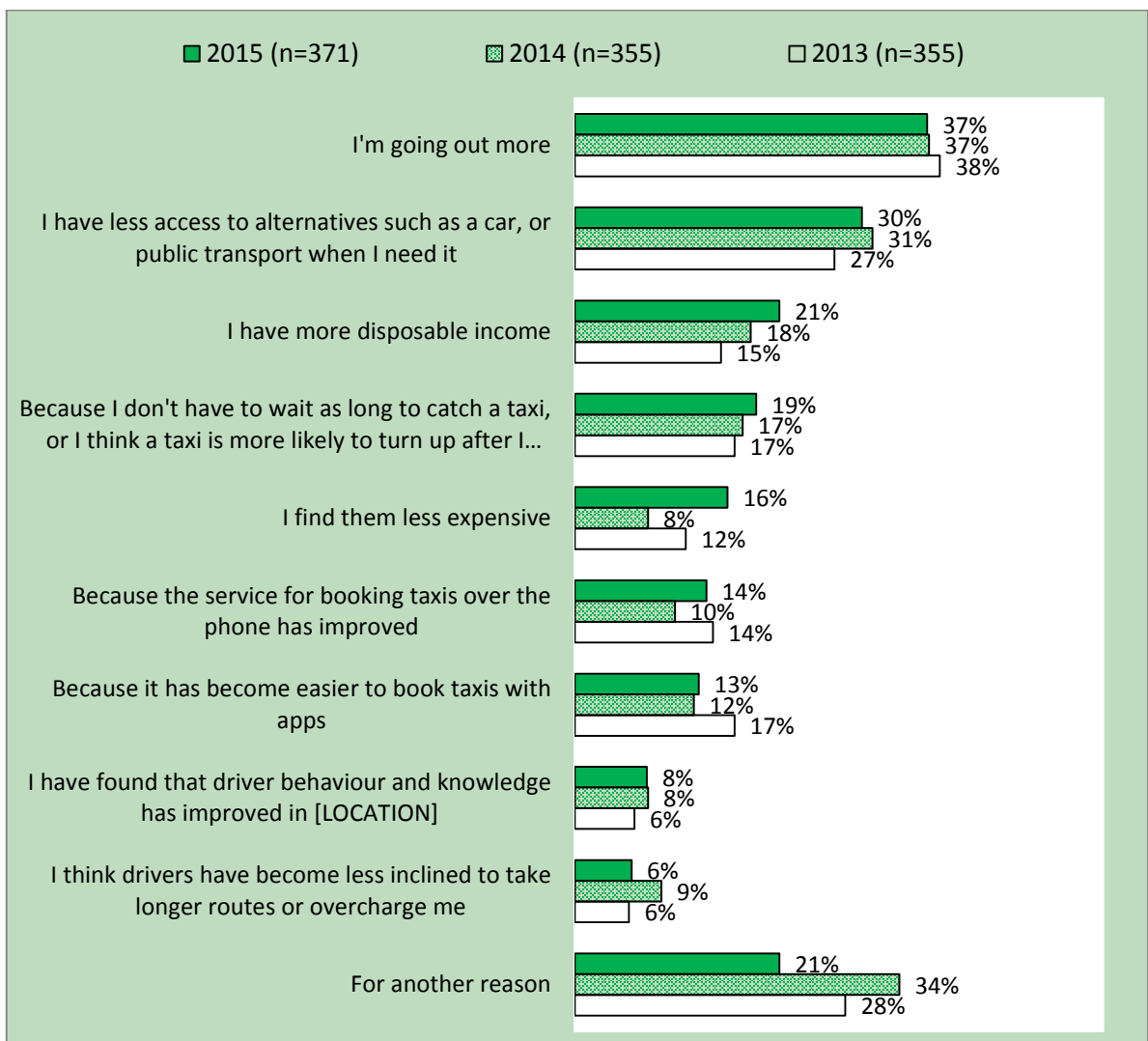
- ✧ better car access (41% and 40% compared to 24% in Urban Sydney)
- ✧ going out less (33% and 37% compared to 35% in Urban Sydney)
- ✧ finding taxis more expensive (48% and 34% compared to 53% in Urban Sydney)

- ✧ having less disposable income (24% and 34% compared to 23% in Urban Sydney).

Improved public transport is less likely to be selected in Other Urban (16%) or Country (5%) locations than in Urban Sydney (23%), as is worse driver behaviour (4% and 3% compared to 15%).

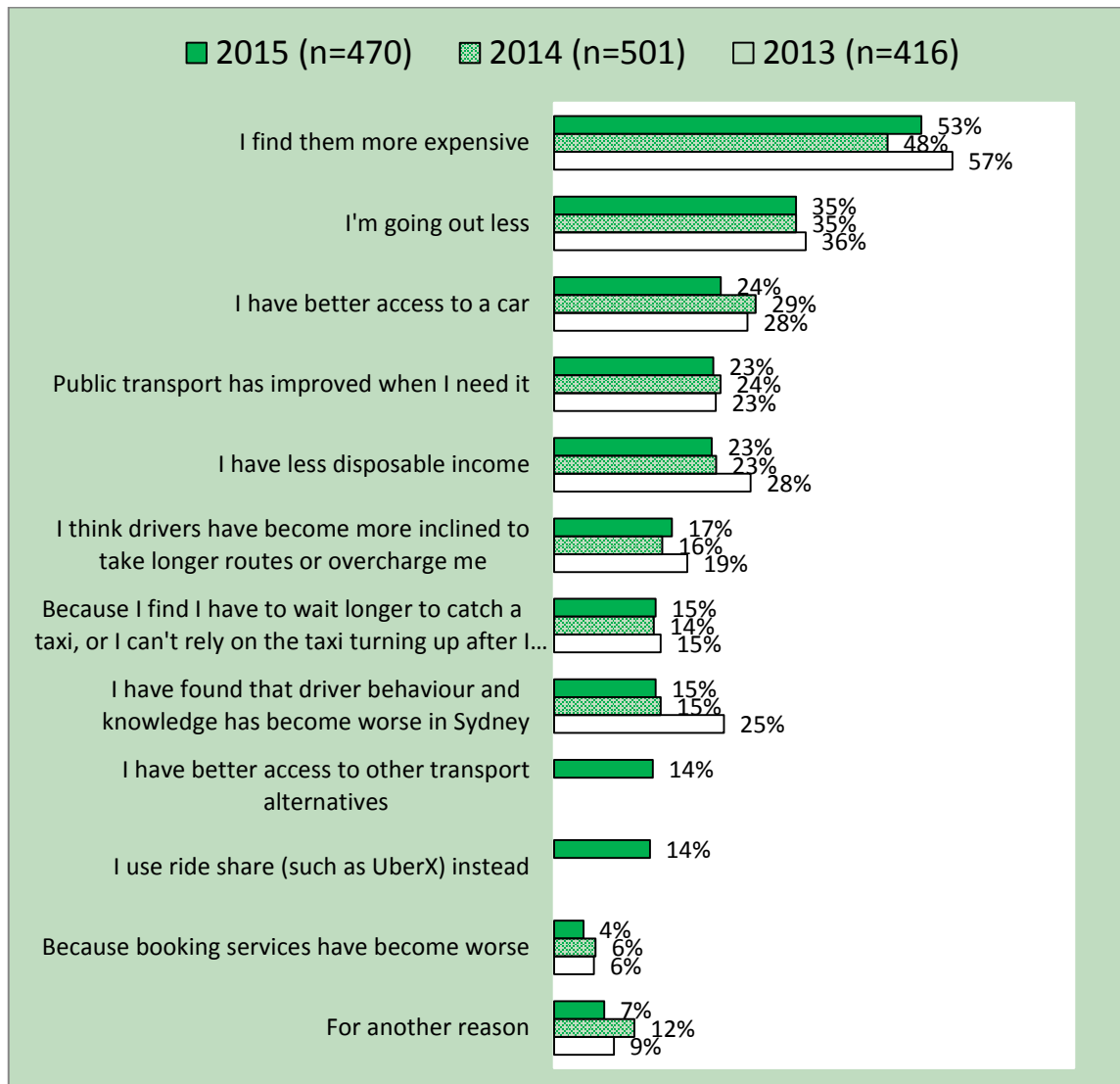
Given the sample sizes there is little room for these differences to be statistically significant.

Figure 6. Reasons for increased frequency of taxi use – Urban Sydney



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

Figure 7. Reasons for decreased frequency of taxi use – Urban Sydney



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

4.4. 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 8.)

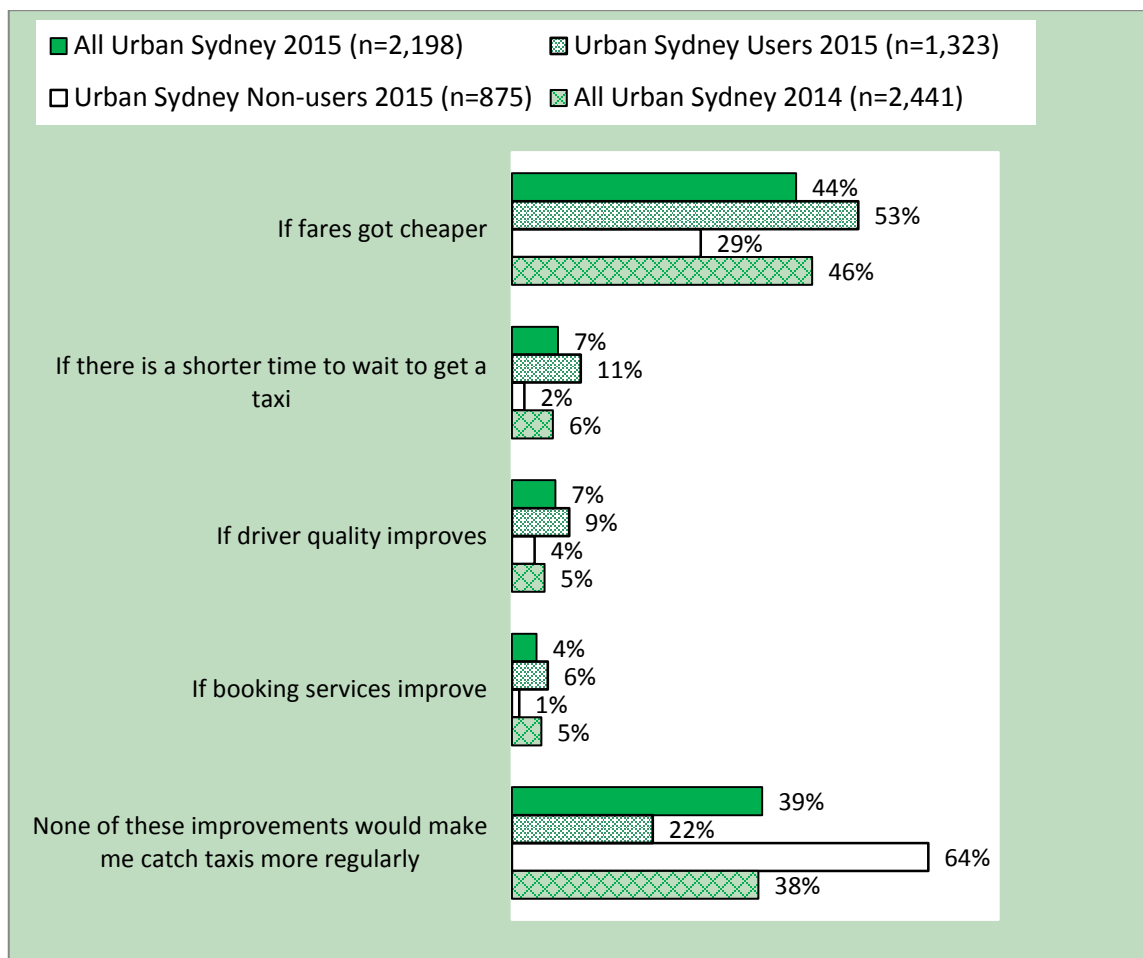
As in 2014, in 2015 Urban Sydney users are more willing than non-users to say they would increase use in response to the prompted improvements. As in 2014, "cheaper fares" are still by far the most often endorsed for both users and non-users. Reduced waiting times, improved driver quality and improved booking services are each the most persuasive for 6 to 11% of users and 1 to 4% of non-users. Non-users are even more likely

(64%) 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 2015.

In Other Urban and Country locations, cheaper fares is also the dominant reason that would prompt increased use especially among users (59% of n=232 Other Urban users and 53% of n=90 Country taxi users) with few selecting any of the other reasons. It appears that price is the dominant conscious “driver” of decisions about frequency of taxi use across all three regions sampled in 2015 as it was in 2014, and in the Urban Sydney region in 2013.

Figure 8. Most likely to increase use in the next year



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

4.5. 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 9 shows the results for the four surveys with the 2015 and 2014 locations shown separately.

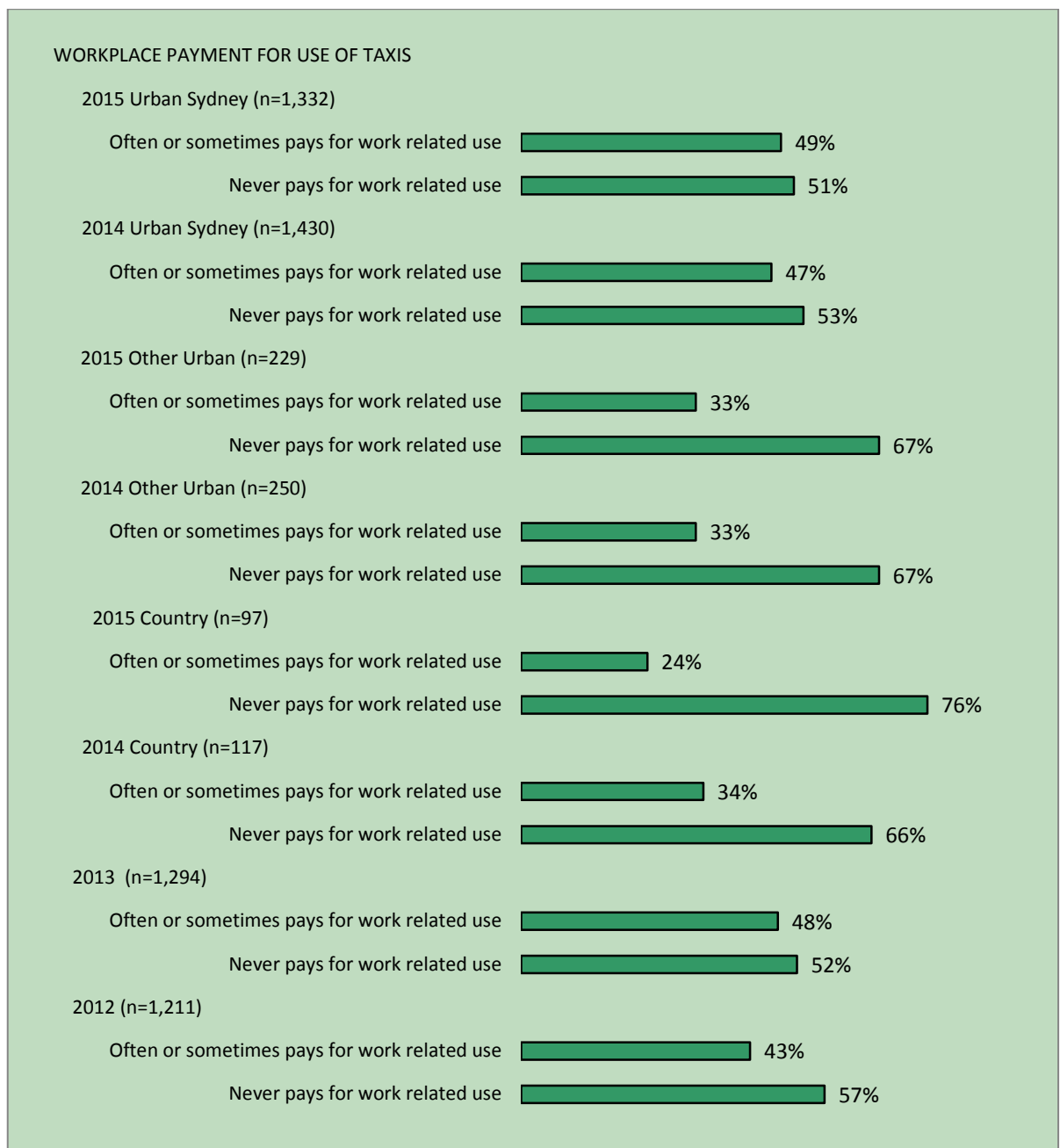
In Urban Sydney (2015 and 2014) and each of the previous surveys (also limited to Urban Sydney), just over half the respondents doing paid work reported that their workplace never pays for work-related use of taxis (51% to 57%). This is significantly more common in the 2015 and 2014 Other Urban and Country locations, where around two thirds to three quarters of those who worked reported their workplace never pays for work-related use of taxis.

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 Sydney in 2012 (25% in 2012 compared to 13-19% in the more recent years - see Figure 10).

Among those who used a taxi for work purposes, reporting that use of a taxi for work purposes was allowed **less often** is much less common in 2014 and 2103 than in 2012 (13 to 19% compared to 25%).

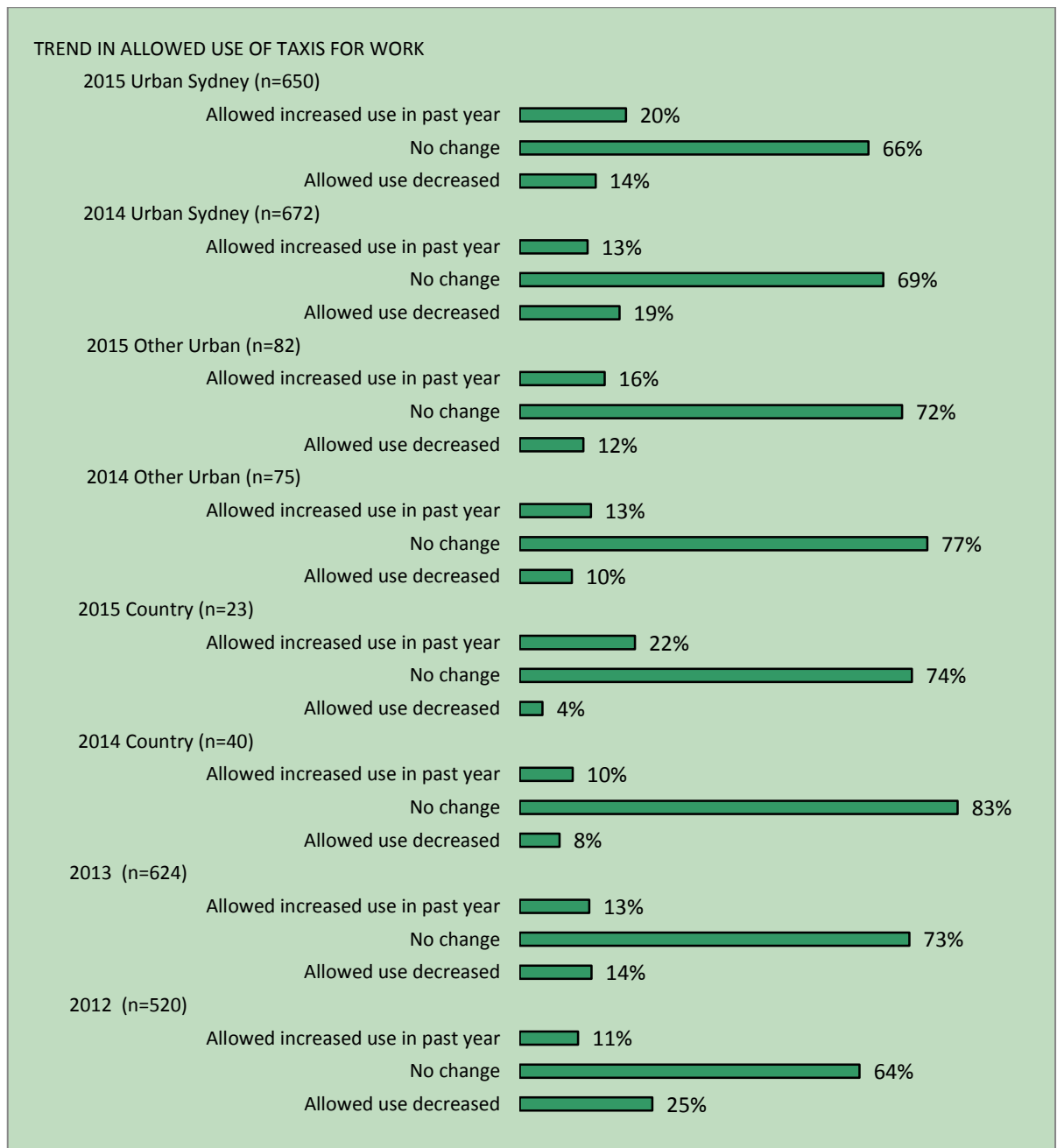
There are no significant variations in whether willingness to pay is increasing, decreasing or not changing.

Figure 9 Workplace taxi use policies



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 10 Trend in workplace taxi use policies



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. Results: Most recent taxi trip

5.1. How taxi obtained

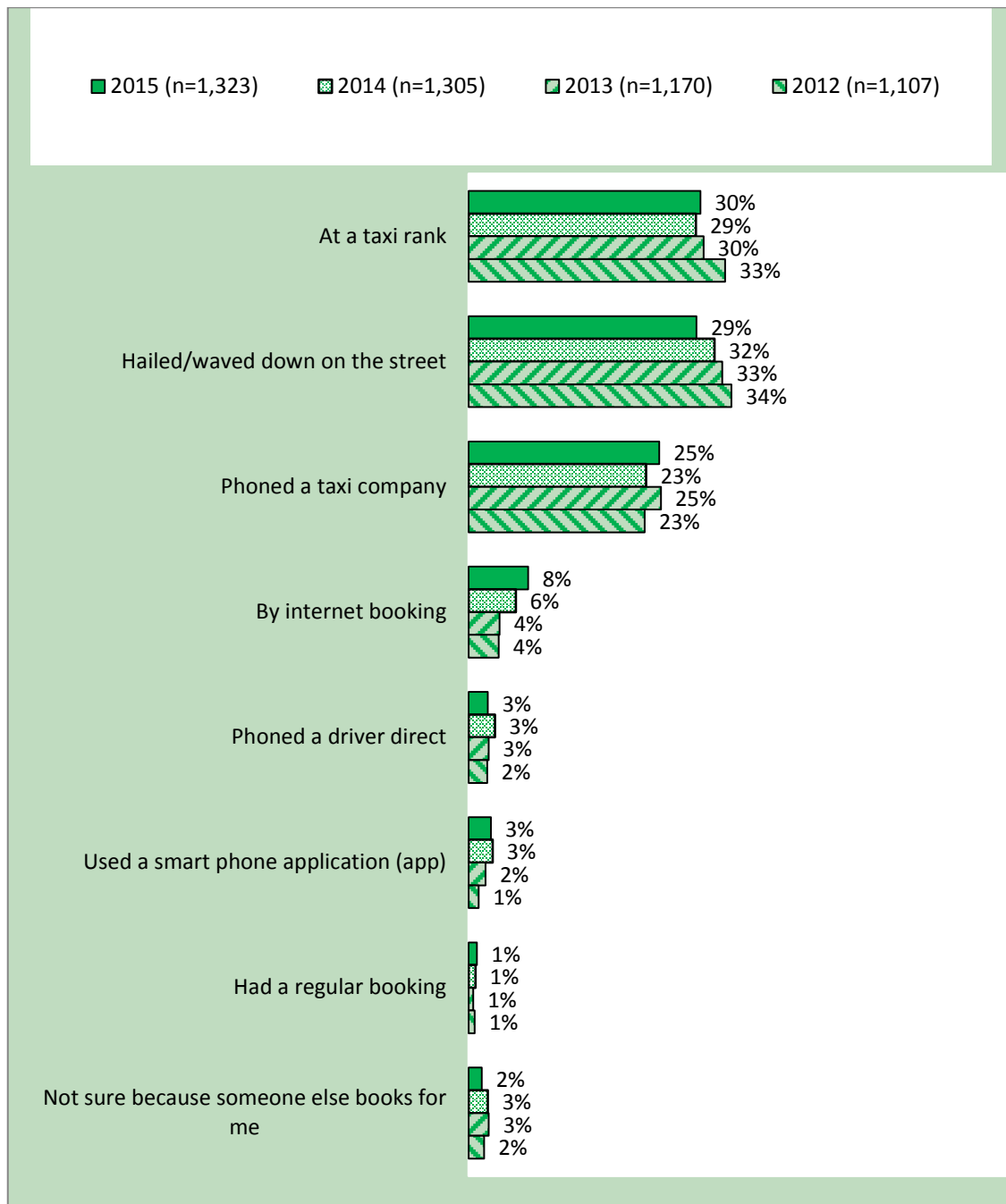
On their last taxi trip, the bulk of taxi users employed one of the traditional methods – hailing the taxi in the street, catching a taxi at a taxi rank, or phoning a taxi company (see Figure 11 and Figure 12). This is true in Urban Sydney in all four surveys to date, and also in the 2015 and 2014 Other Urban and Country locations.

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

Alternative methods enabled by mobile or internet technology accounted for 11% (9% in 2014) of these trips in Urban Sydney, 8% (4% in 2014) in Other Urban locations and 3% (2% in 2014) in Country locations. Only 3% in Urban Sydney (3% in 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 2013 to 2014 in Urban Sydney methods although the small percentage that report booking through the internet appears to be growing from 4% in 2012 to 8% in 2015.

However, there are marked differences in the method used to obtain a taxi between Urban Sydney, Other Urban and Country locations in both 2015 and 2014 (see Figure 12). The three traditional methods are about equally often used in Urban Sydney, with slightly fewer making a phone booking (25%) than taking the taxi at a rank (29%) or hailing a passing taxi (32%).

Figure 11. How taxi obtained – Urban Sydney



Q22. I got the taxi ...

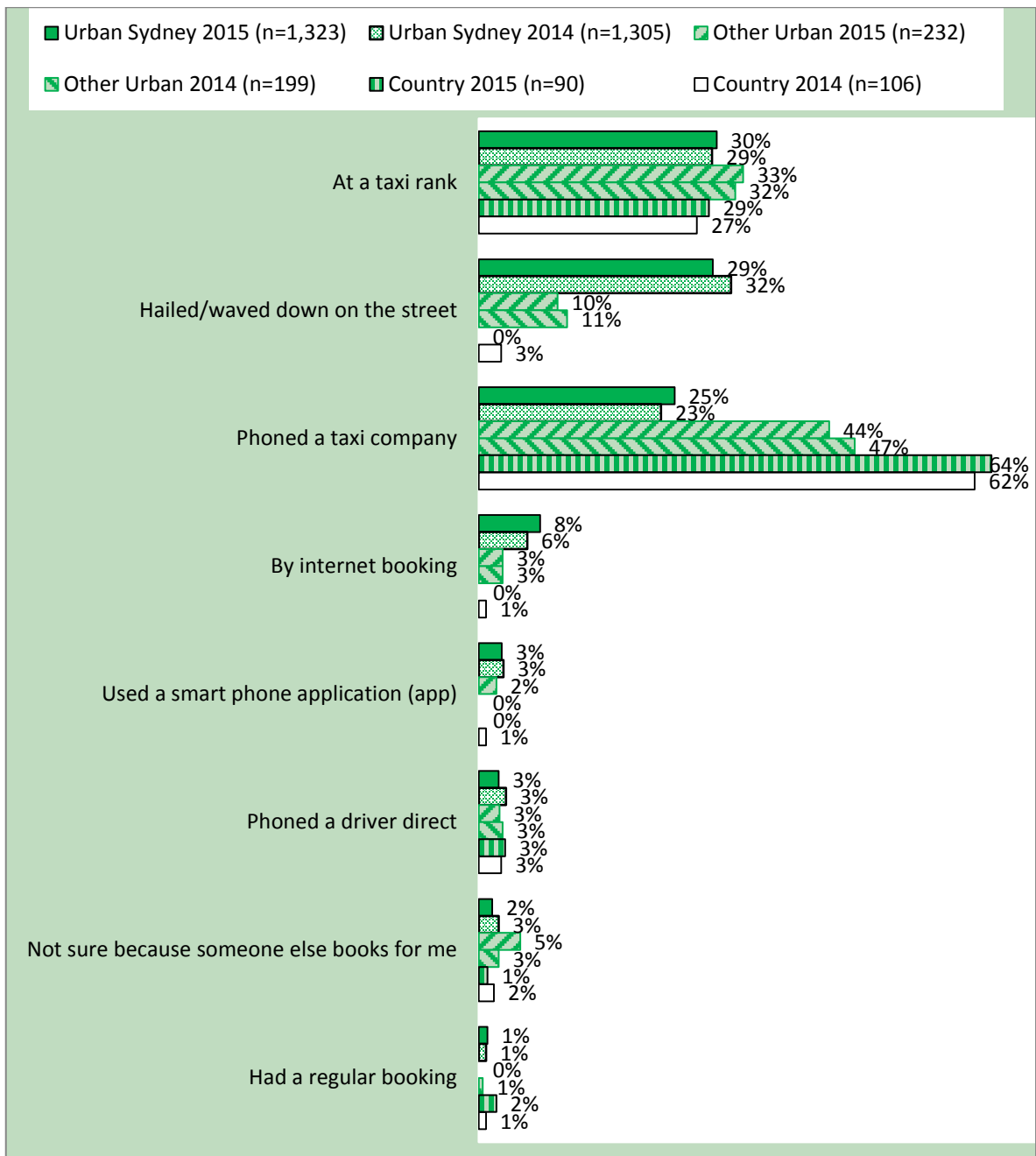
Hailing a passing taxi is much less common in the Other Urban areas (10-11%) and very rarely reported in Country locations (0-3%). Phoning for the taxi is much more common in the Other Urban locations (44-47%) and is the dominant method in Country locations (64-62%). The proportion catching their last taxi at a taxi rank is quite similar in all locations – 29-30% in Urban Sydney, 32-33% in Other Urban and 27-29% in Country locations.

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 the 44 in 2015 (39 in Urban Sydney and 5 in Other Urban) and 42 who had used an app in 2014 (40 in Urban Sydney and 1 each in the other two regions), the most often used are UberTAXI (25% in 2015; not coded in 2014), Mtaxi (23-24%), and Silver Service (14-17%). Legion Taxis fell sharply from 36% in 2014 to 7% in 2015. Gocatch is reported by a few (10-11%). Ingogo (2/44), iCab (2/44), StGeorgeElite (1/44) and others not listed (4/44) accounted for the remaining app users in 2015.

Given the small sample bases, no firm conclusions about shifts in market share can be drawn, but it does appear that while the numbers using an app remain low, the range of offers available and being used is increasing. One change 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.

Figure 12. How taxi obtained by location, 2015 and 2014



Q22. I got the taxi ...

5.2. 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 13).

In each survey from 2012 to 2015, waiting less than five minutes is much more likely if boarding at a rank (52-58%) or hailing a passing taxi (42-46%) than if booking the next available taxi (7-11%).

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 (75-83%) than for those booking the next available taxi (46-50% 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 (14-18%) than for those hailing a taxi (1-4%) or boarding at a rank (1-5%).

The stability of these results is notable.

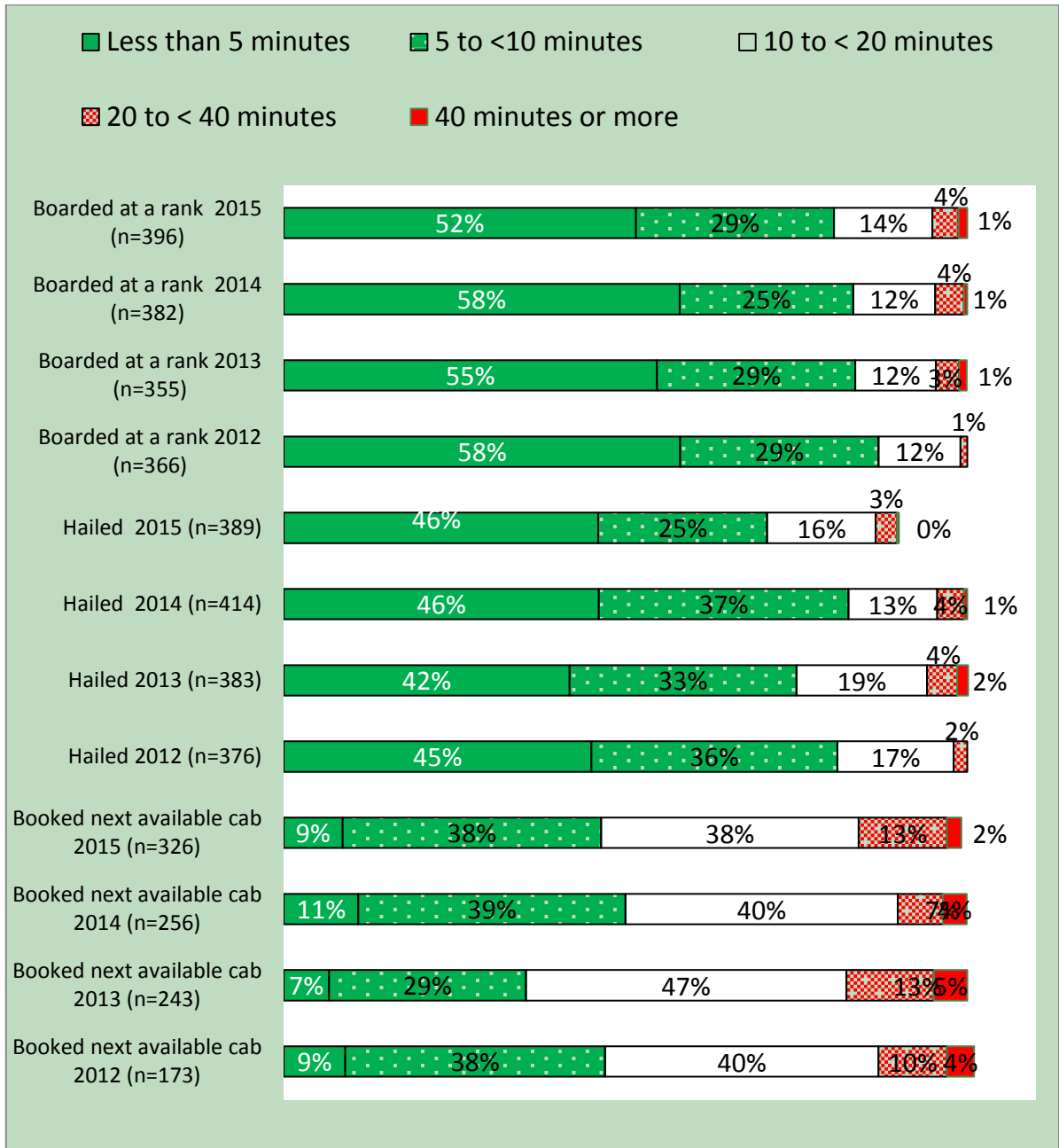
Effect of location, 2014 and 2015

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

In 2014, for those who booked the next available taxi, there are n=77 in Other Urban and n=53 in Country locations. Waiting times when the next available taxi is booked appeared to be lowest in Country locations, but no firm conclusion can be drawn given the limited sample size. For Country plus Other Urban locations, 58% waited less than 10 minutes compared to 50% in Urban Sydney.

Similar results were obtained in 2015, with n=77 Other Urban and n=26 Country respondents reporting on the time they spent waiting at a taxi rank; n=23 Other Urban and no Country respondents reporting on waiting time when they hailed a taxi; and n=94 Other Urban and n=42 Country users reporting on waiting time when they booked the next available taxi. As in 2014, waiting times when booking the next available were shortest in the Country locations (67% under 10 minutes) and less likely to be under ten minutes in Urban Sydney (47%), with the Other Urban locations intermediate (55% under 10 minutes). For those who waited at a rank, waiting less than 10 minutes is least common in the Country locations (69%, but only n=26 cases) and quite similar for those in Other Urban (88% of n=77) and Urban Sydney (81% of n=386). In all locations, booking is associated with longer waiting times than waiting at a rank or hailing a taxi, but hailing a taxi is very rare in the Country towns.

Figure 13. Waiting time by how taxi obtained Urban Sydney



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]

5.3. Arrival time performance

Figure 14 shows the arrival time performance of taxis booked for a particular time in the Urban Sydney region in 2015, 2014, 2013 and 2012.

With 55% on time, 19% being less than five minutes late, and another 12% being less than 10 minutes late, in 2015 76% had

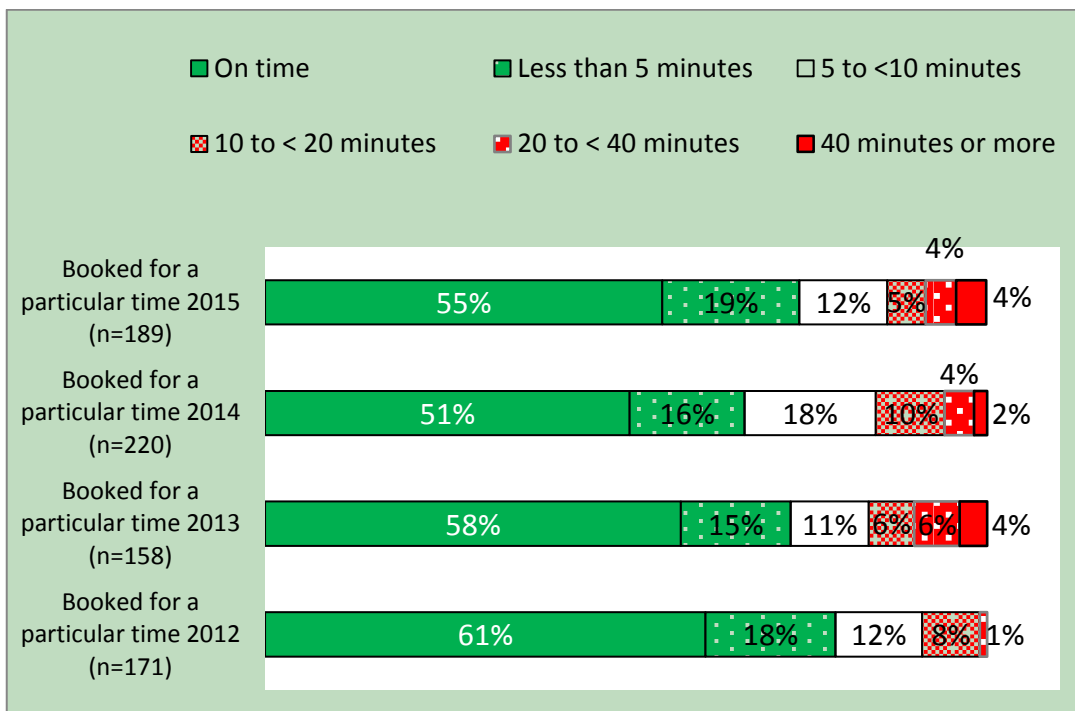
to wait less than 10 minutes and 64% less than five minutes. This compares to 85% less than 10 minutes and 67% less than five minutes in 2014.

This method had the best overall “time to boarding” performance.

The decline in prompt arrival performance for this method of obtaining a taxi found in 2014 recovered in 2015 to fall between the results for 2013 and 2012.

The samples for those who booked a taxi for a specific time in Other Urban (n=26) and Country (n=21) locations in 2015 are too small to allow any conclusions to be drawn about comparative performance.

Figure 14. Arrival time performance - booked for a particular time, Urban Sydney



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

5.4. 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 15 shows the breakdowns for 2015. As in previous surveys, the sample bases for some of these breakdowns are

relatively small. Those with less than 20 responses are excluded. Those with less than 50 should be treated with great caution.

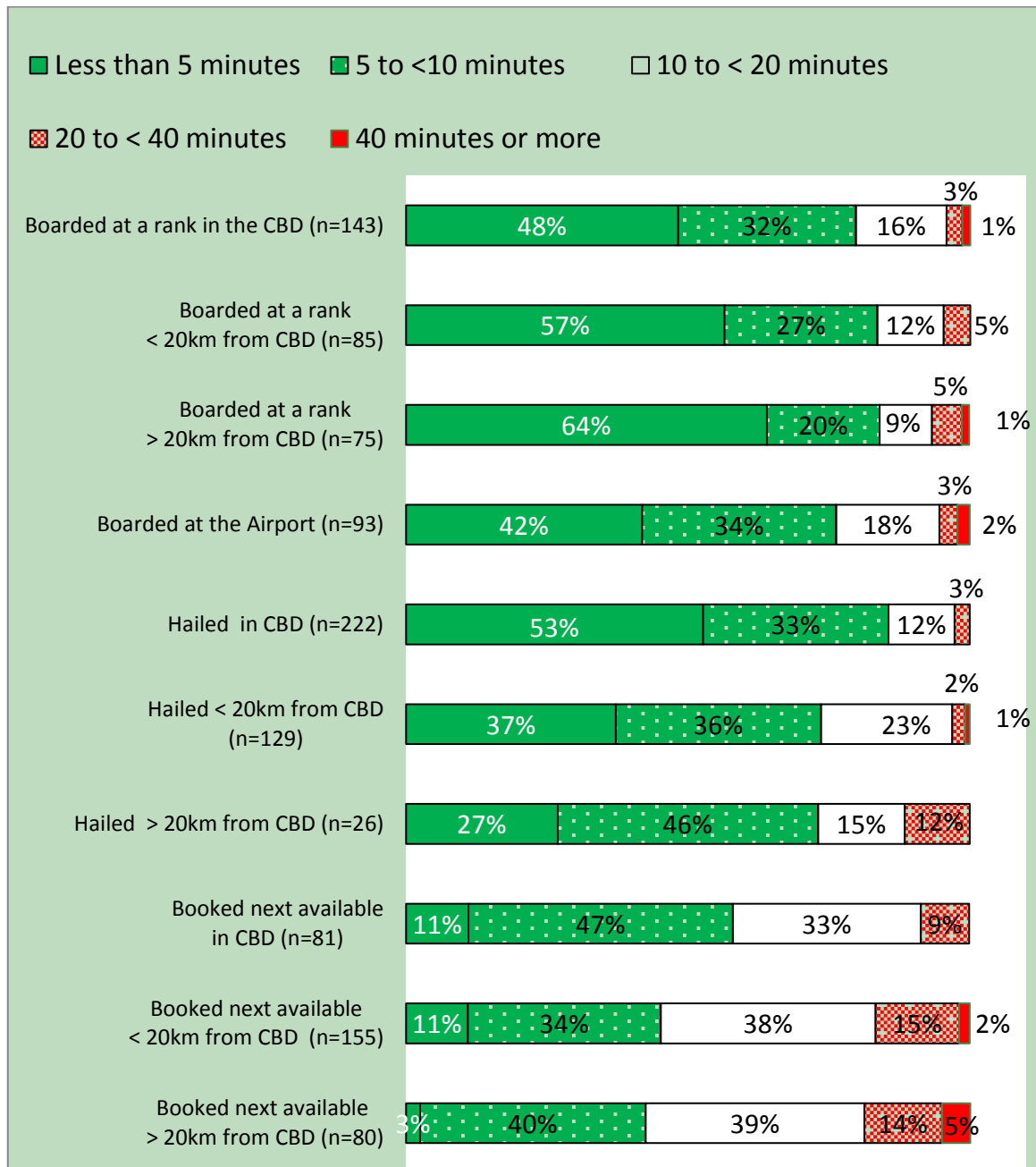
The 2015 results confirmed the consistent finding in all surveys to date of longer waiting times reported when the next available taxi was booked for every starting point. In general, the method used to obtain the taxi appeared more important than where the taxi is obtained.

There is a trend evident in 2015 for those hailing a taxi in the Sydney CBD to be more likely to wait less than 10 minutes, while those hailing a taxi more than 20 km from the Sydney CBD are least likely to wait under 10 minutes. While those taking a taxi at Sydney airport are a little less likely to wait less than 10 minutes (76%) than those using a rank elsewhere (80-84%) the difference is too small to be statistically reliable.

Thus, these more detailed analyses essentially confirm that waiting times tend to be longer when the next available taxi has been booked, and might be a little less when taking a taxi at a rank than when hailing a taxi.

For all methods, waiting times of over 10 minutes are not common (in 2015, generally reported by 20% or less if hailing the taxi or taking a taxi at a rank, and by less than half if booking the next available taxi), and waiting times of over 20 minutes are rare (mostly reported by under 10% for hailing a taxi or taking one at a rank, but by 9-19% if the next available taxi is booked).

Figure 15. Waiting time by origin and how taxi was obtained
Urban Sydney 2014



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.

5.5. Booked taxi arrival time performance and origin

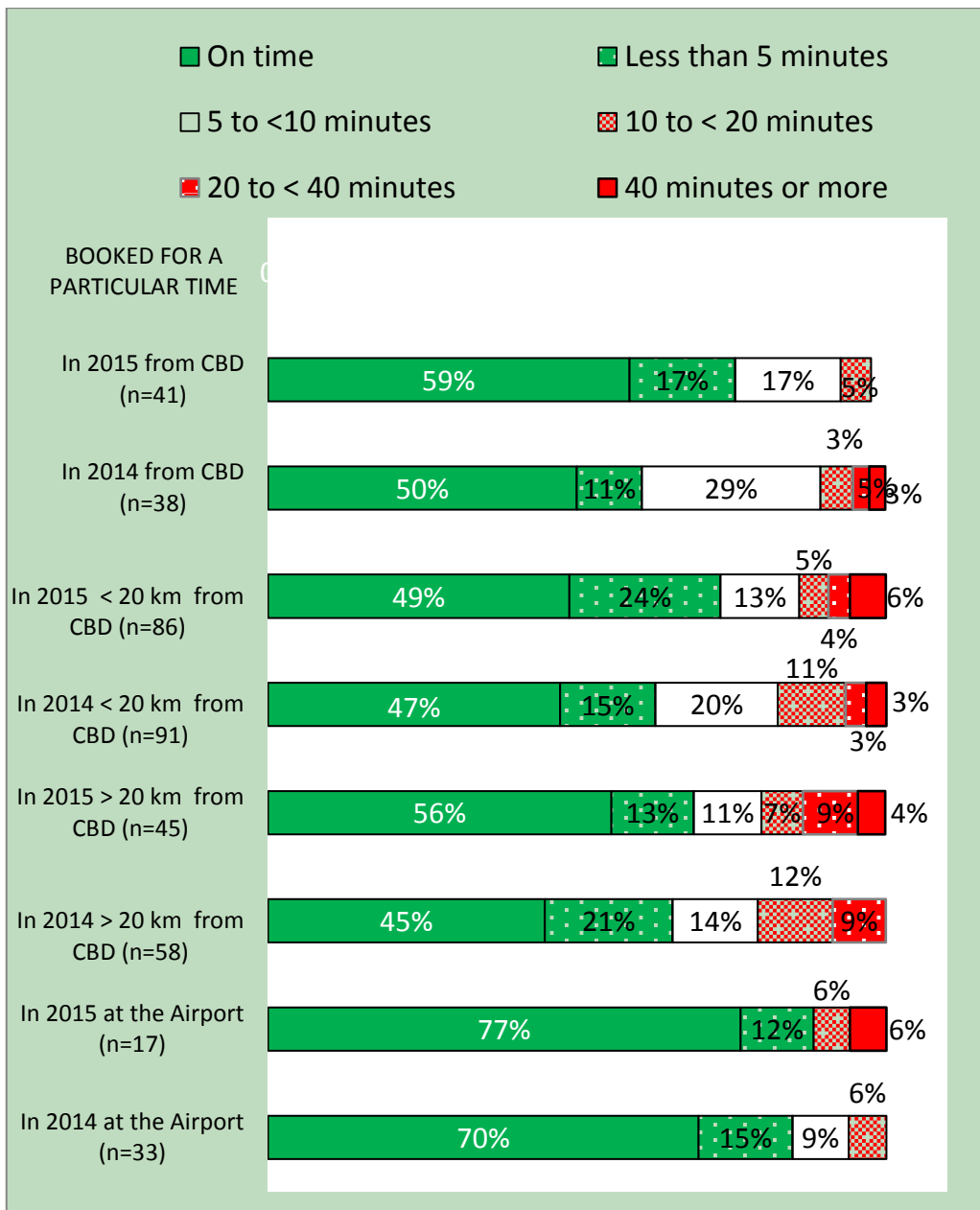
Figure 16 shows booked arrival time performance broken down by the origin of the journey.

The best performance is reported for taxis booked for a particular time at the airport, but this sample is very small (n=17 in 2015 and n=33 in 2014) and so the result might be quite unreliable. However, the results for the two surveys are very similar which provides more confidence that the difference is reliable. For this reason the result is shown despite the base sample for 2015 being less than 20.

The percentage that arrived on time or less than five minutes late at other locations in 2014 and 2015 when booked for a particular time ranged from 61% to 69% apart from those who booked a taxi for a particular time in the CBD in 2015, which is 76%. The percentage that waited less than five minutes for boarding at a taxi rank at any location (52% in 2015, 53% in 2014) and for hailing a taxi at any location (47% in 2015, 43% in 2014) are lower than those for users who had booked for a specific time. It appears that booking for a specific time produces lower waiting times. This confirms the findings from 2013.

Given the consistent finding over three 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 16. Arrival performance and origin Urban Sydney 2014



Q14. On my most recent taxi trip, I started my journey ...

Q24b. The taxi arrived ...

IF Q24 = booked a taxi for a particular time

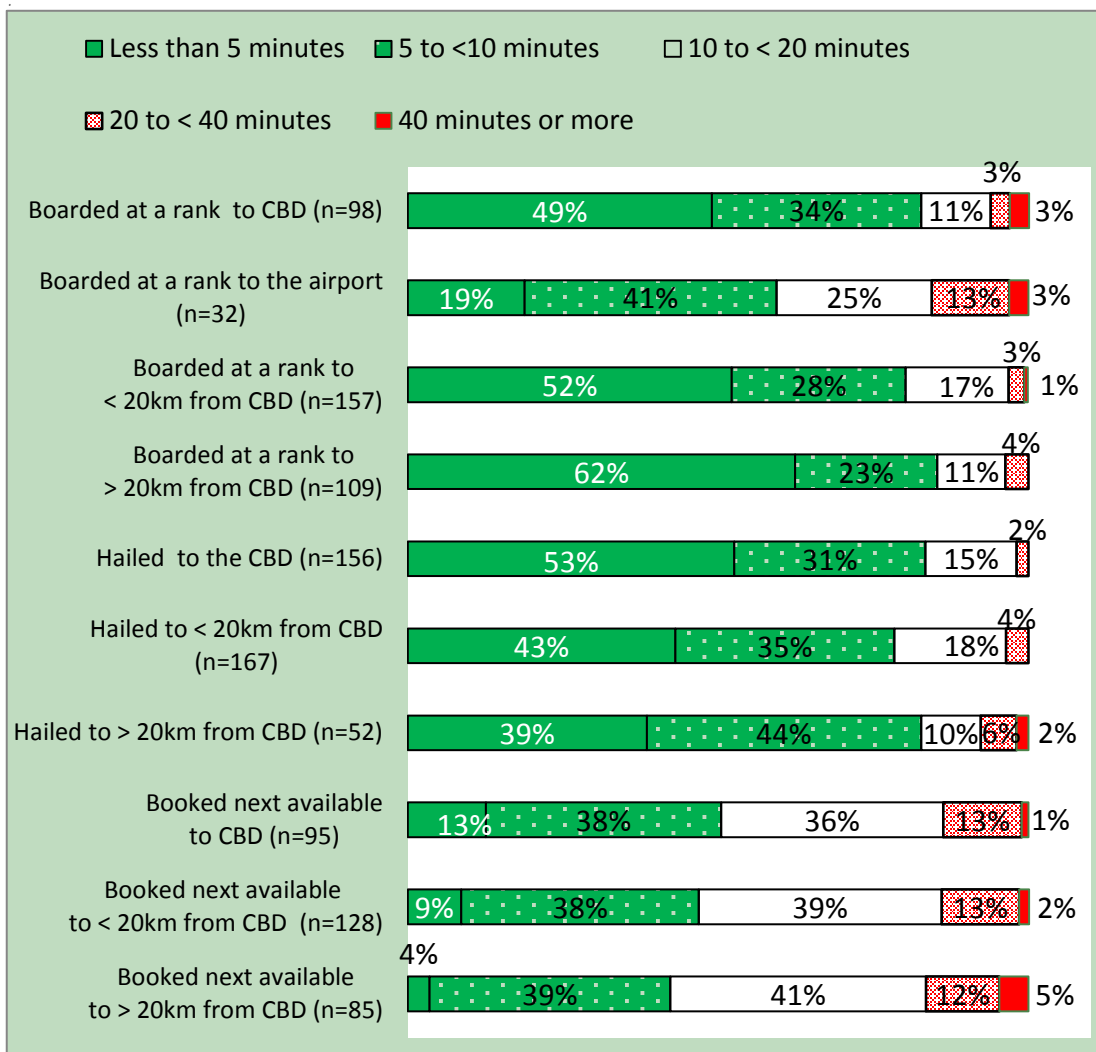
NOTE: Treat with caution where n<50

5.6. Waiting time and destination

Figure 17 shows the variations in waiting time by how the taxi was obtained and the destination. Those going to the airport who hailed the taxi or booked the next taxi available are not shown due to the low sample bases.

Waiting time is much less likely to be under five minutes and less than ten minutes when the next available taxi was booked. The delay is smallest for trips to the CBD and largest for trips of more than 20 kms from the CBD. A similar pattern based on destination is evident for taxis that were hailed.

Figure 17. Waiting time by destination and how taxi obtained: Urban Sydney 2015



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 ...

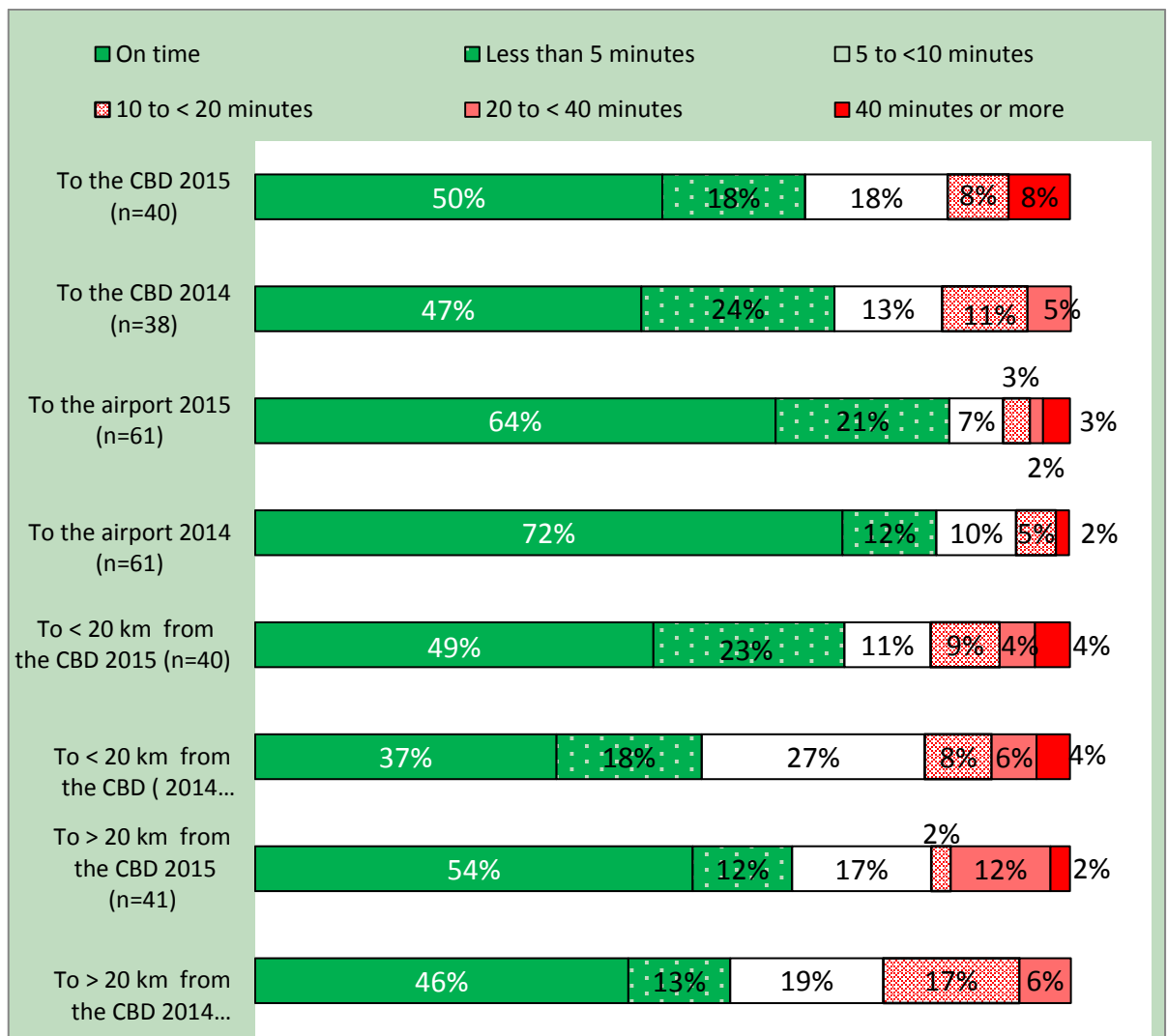
NOTE: Treat with caution where n<50. Where n<20, result not shown.

The same patterns were found in the 2014 data, suggesting that these are reliable findings.

5.7. 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 both 2015 and 2014 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 18). Other variations are not consistent from 2014 to 2015 which is perhaps due to the relatively small sample bases (n=38-42).

Figure 18. Arrival performance and destination Urban Sydney 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.

5.8. 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 19.

While 39 cases reported taking a taxi at a rank on a Sunday (after 5am) only 13 reported hailing a taxi during the day on Sunday (after 5am) and only 17 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, waiting times under five minutes are significantly less likely to be reported for taxis hailed on Friday or Saturday than for those hailed Monday to Thursday. The difference for those taken at a rank Friday or Saturday or Monday to Thursday is not significant in 2015, but is in the same direction as the significant difference in 2014. When the results for hailing and obtaining a taxi at a rank are combined for 2015, waiting less than five minutes is significantly more likely on Monday to Thursday than on Friday and Saturday.

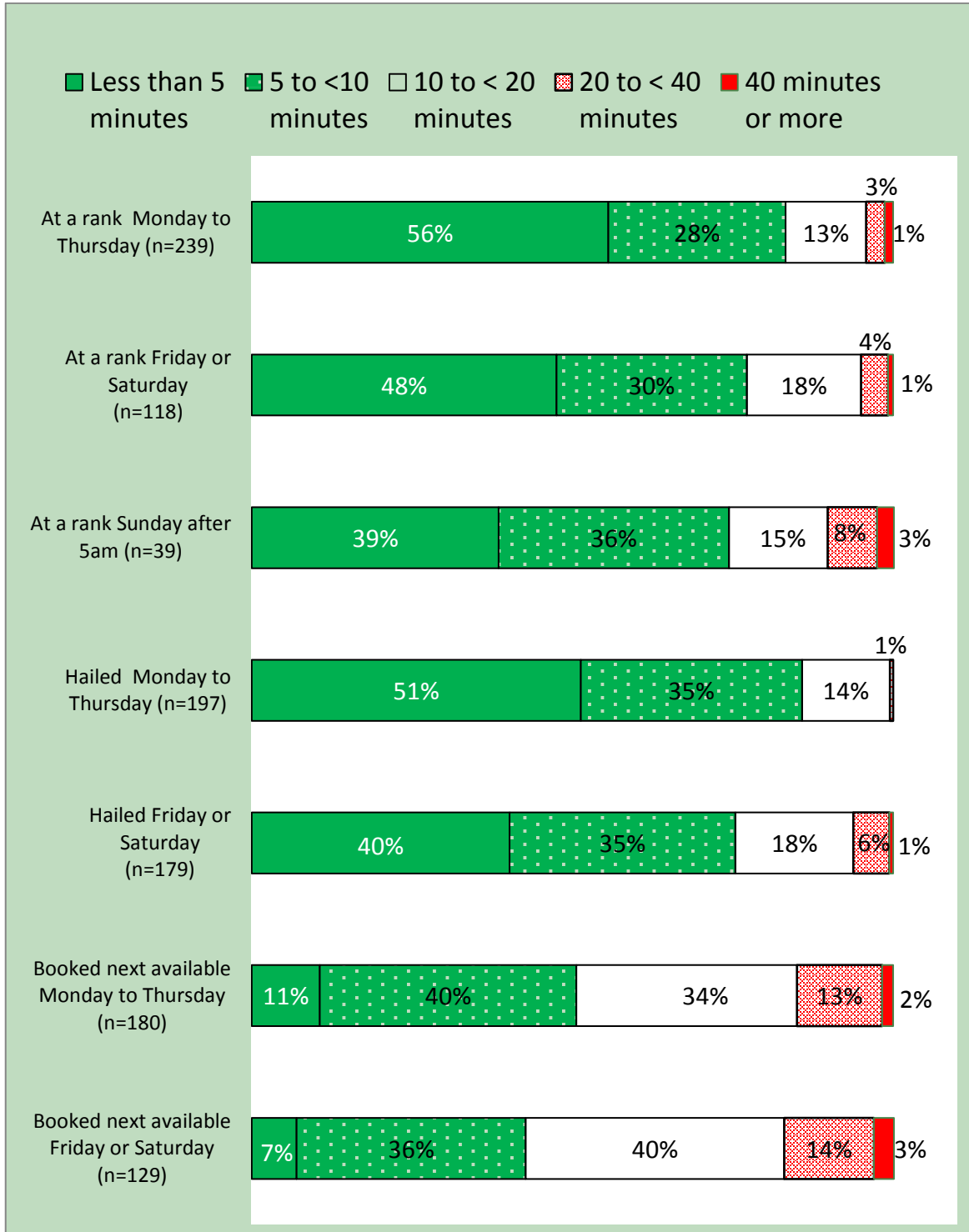
As in 2014, waiting times are significantly less likely to be under 5 minutes when the next available taxi was booked regardless of the day of the week. Waiting time is much more likely to be 10 to 40 minutes when the next available taxi is booked than if the taxi is hailed from the street or obtained at a taxi rank.

Waiting times of more than 10 minutes vary very little by which day of the week it was taken regardless of how the taxi is obtained.

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 five minutes on Friday or Saturday than on Monday to Thursday. This is consistent with the results in 2014 and 2013. Long waits (20 minutes or more) are more common in 2015 than in 2014 suggesting that the reduction noted in 2014 has not been sustained.

Figure 19. Waiting time by how taxi was obtained and day of week, Urban Sydney 2015



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.

5.9. Arrival time performance and day of week

Figure 20 shows 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 15 cases in 2015 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 2015, 65% in 2014) and on Friday or Saturday (44% on time in 2015, 41% in 2014).

The higher proportion arriving more than 10 minutes late found in 2014 is not repeated in 2015.

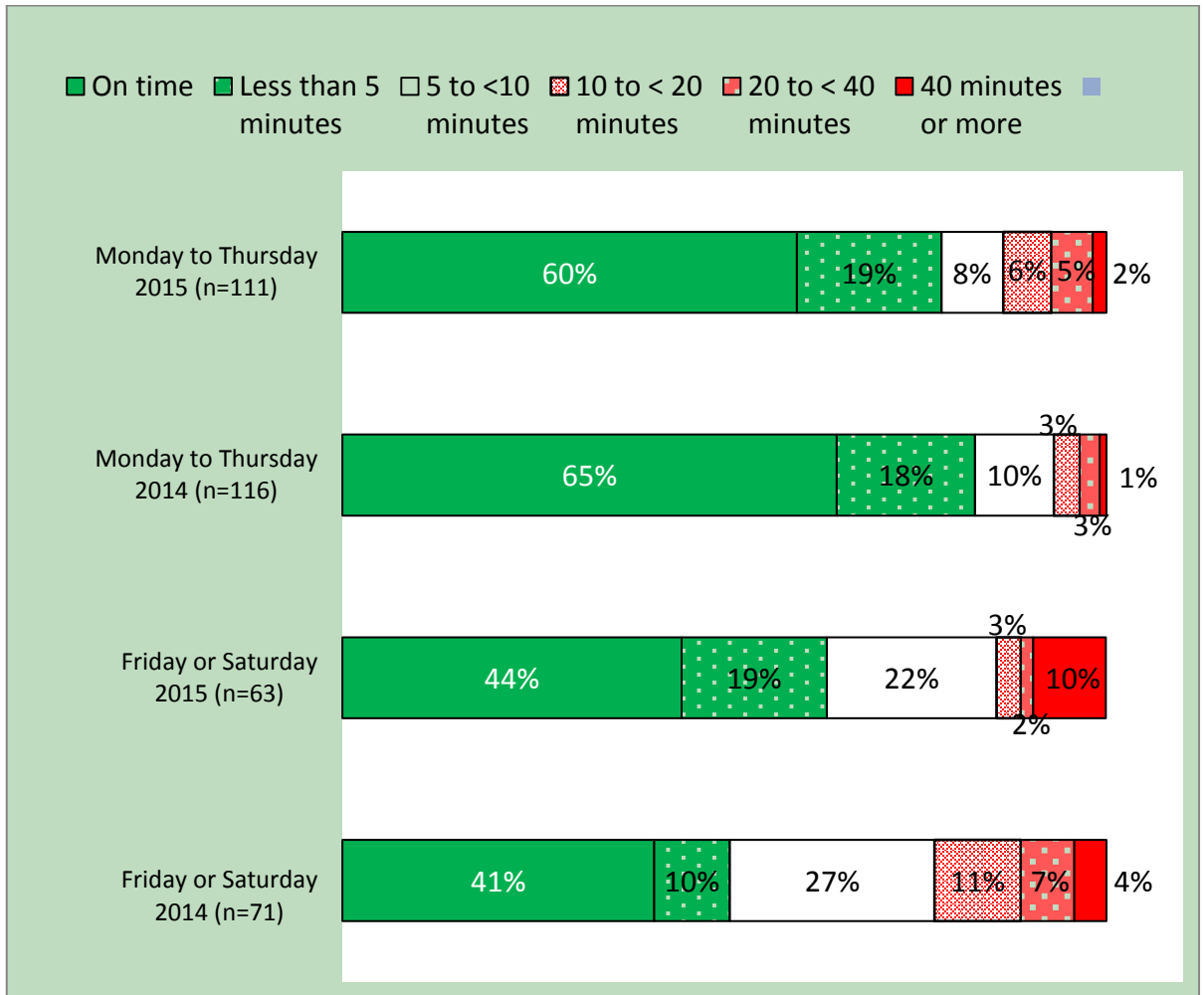
When a taxi is booked for a particular time, the best outcome (not available for other ways of getting a taxi) is on time arrival. Comparisons to the other modes need to combine on time arrival with arriving less than five minutes late.

In 2015, the percentage arriving on time or within five minutes for taxis booked for a particular time is 63% (Friday and Saturday) and 78%. The highest percentage obtained within five minutes for taxis hailed or obtained at a rank in 2015 is 56% and the lowest 39% and even lower when the next available taxi is booked. The percentage that arrived on time or less than five minutes late when booked for a particular time ranged from in 2014 is 42% to 83%. The highest percentage that waited less than five minutes for other modes of obtaining a taxi on any day in 2014 is 61% on Monday to Thursday at a taxi rank and the lowest is 41% for taxis hailed on a Friday or Saturday.

It appears that:

- ✧ On every day, the time waiting to get a taxi is shorter for those booked for a specific time
- ✧ Except when the next available taxi is booked, waiting times are more likely to exceed five minutes on Friday and Saturday than on Monday to Thursday
- ✧ Long waiting times (10 or more and especially 20 or more minutes) are most likely when the next available taxi is booked

Figure 20. Taxis booked for a particular time - arrival performance by day of week Urban Sydney 2015 and 2014



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.

5.10. Waiting time and time of day

Figure 21 shows the variations in waiting time by how the taxi was obtained and the time of day in Urban Sydney in 2015.

The only significant effect of time of day on waiting time is the very high proportion who catch a taxi within five minutes when boarding at a taxi rank overnight (75% compared to 41-54% for catching a taxi at a rank or by hailing at other times).

However, the low sample base for this combination suggest that some caution might be needed in accepting that this difference reflects a true effect.

There are no other consistent differences in waiting time between hailing a taxi in the street and catching one at a taxi rank. The trend for hailing a taxi in the street to take longer than catching a taxi at a taxi rank found in 2014 is not replicated in 2015.

Differences by time of day in the percentage waiting ten minutes or more are inconsistent.

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 the 2014 survey.

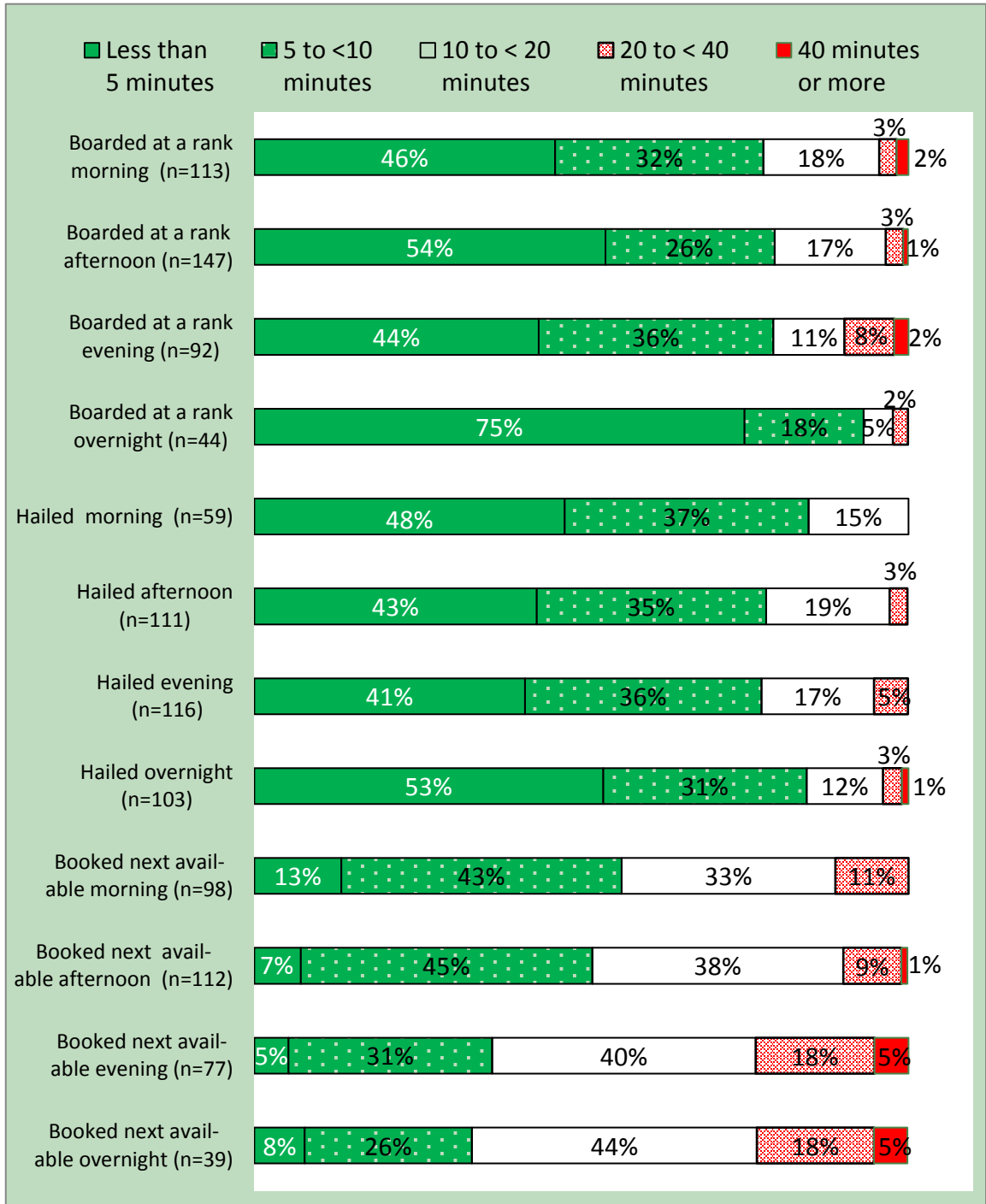
Those booked in the evening or overnight are significantly more likely to take over 10 minutes to arrive than those booked in the morning or afternoon. This effect of booking in the evening on waiting time was also found in 2014.

In this survey, long waiting times are significantly **less** common (7% over 10 minutes) overnight when catching a taxi at a rank than at other times (20-22%), but the overnight sample (n=44) is very small and might not be fully representative. No significant differences by time of day are evident when a taxi was hailed (range 15-22%).

Thus, the mode of acquiring a taxi is much more important than the time of day, with those who book the next available taxi having longer to wait than others.

Longer waiting times when the next available taxi was booked regardless of time of day were also found in 2014 and 2013. Longer wait times for taxis booked in the evening were also found in 2014. Other differences are not consistent across survey years.

Figure 21. Waiting time by time of day and how taxi obtained
Urban Sydney 2015



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.

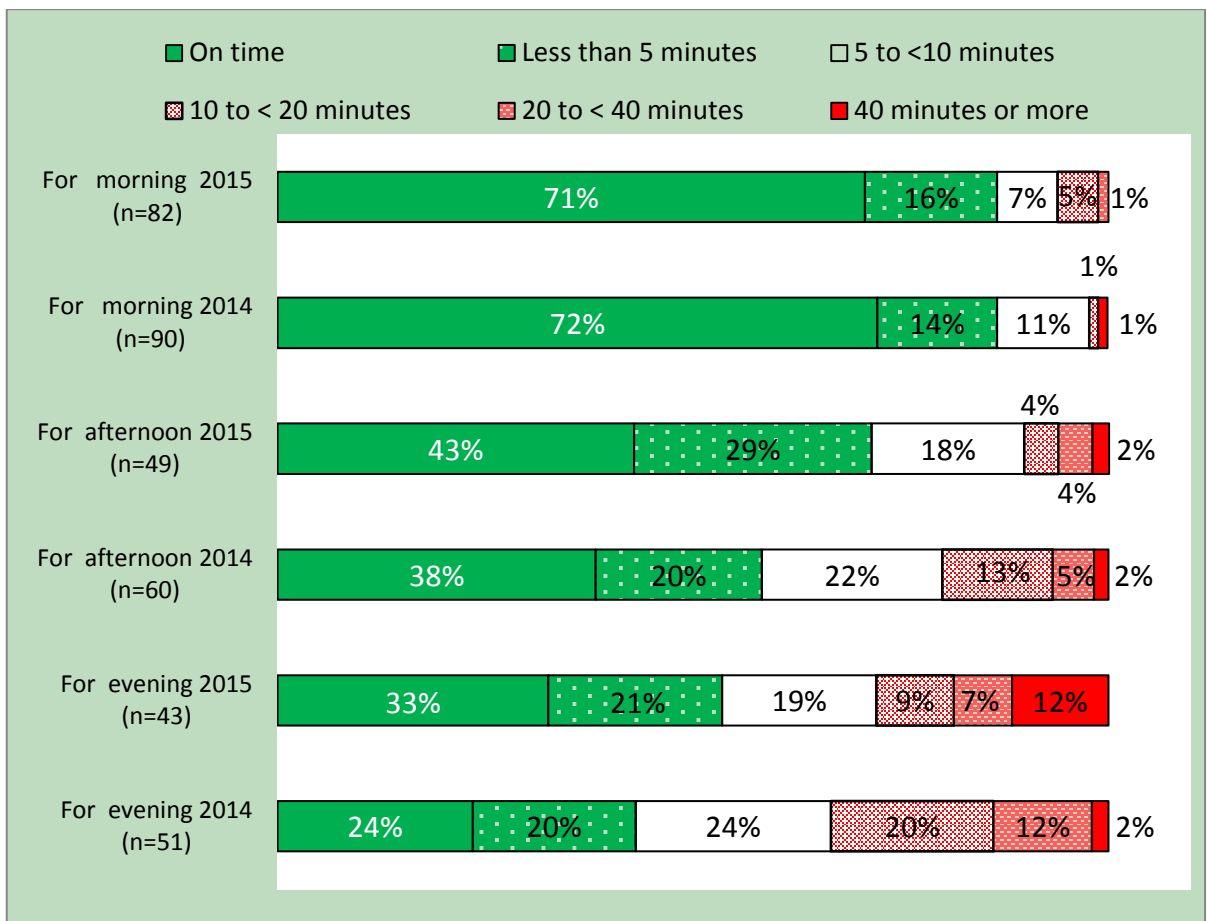
5.11. Arrival time performance and time of day

In both 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 slowest for those booked for the evening (6pm to 10pm), as can be seen in Figure 22. The differences between morning and other times are statistically significant.

Afternoon and evening waiting times are shorter in 2015 than 2014 restoring the performance found in 2013.

Results for overnight bookings are not shown due to low sample bases (under 20).

Figure 22. Arrival time performance by time of day booked Urban Sydney 2014 and 2015



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)

5.12. 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 23.

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. Those who in the end did not take a taxi when they had considered doing so were asked about the origin, destination, day of week and time of day of that intended trip, whether they were unable to get a taxi or decided not to take one.

Figure 23 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=1,323 in Urban Sydney, n=232 in Other Urban and n=90 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 are able to get a taxi the last time they tried (73% in 2015, 76% in 2014), as are a significantly higher proportion of Other Urban (88%) and Country (86%) users in 2015. The Other Urban and Country results are significantly higher in 2015 than in 2014 for Other Urban users (88% compared to 79%) but not for Country users (86% compared to 90%).

The reasons given for being unable to get a taxi are a taxi not turning up as booked (12% in Urban Sydney, 7% in Other Urban and 7% in Country locations), being unable to find a taxi when trying to hail one from the street (9% in Urban Sydney, 3% in Other Urban and 3% in Country locations), and not being able to find one at a taxi rank (6% in Urban Sydney, 2% in Other Urban and 4% in Country locations).

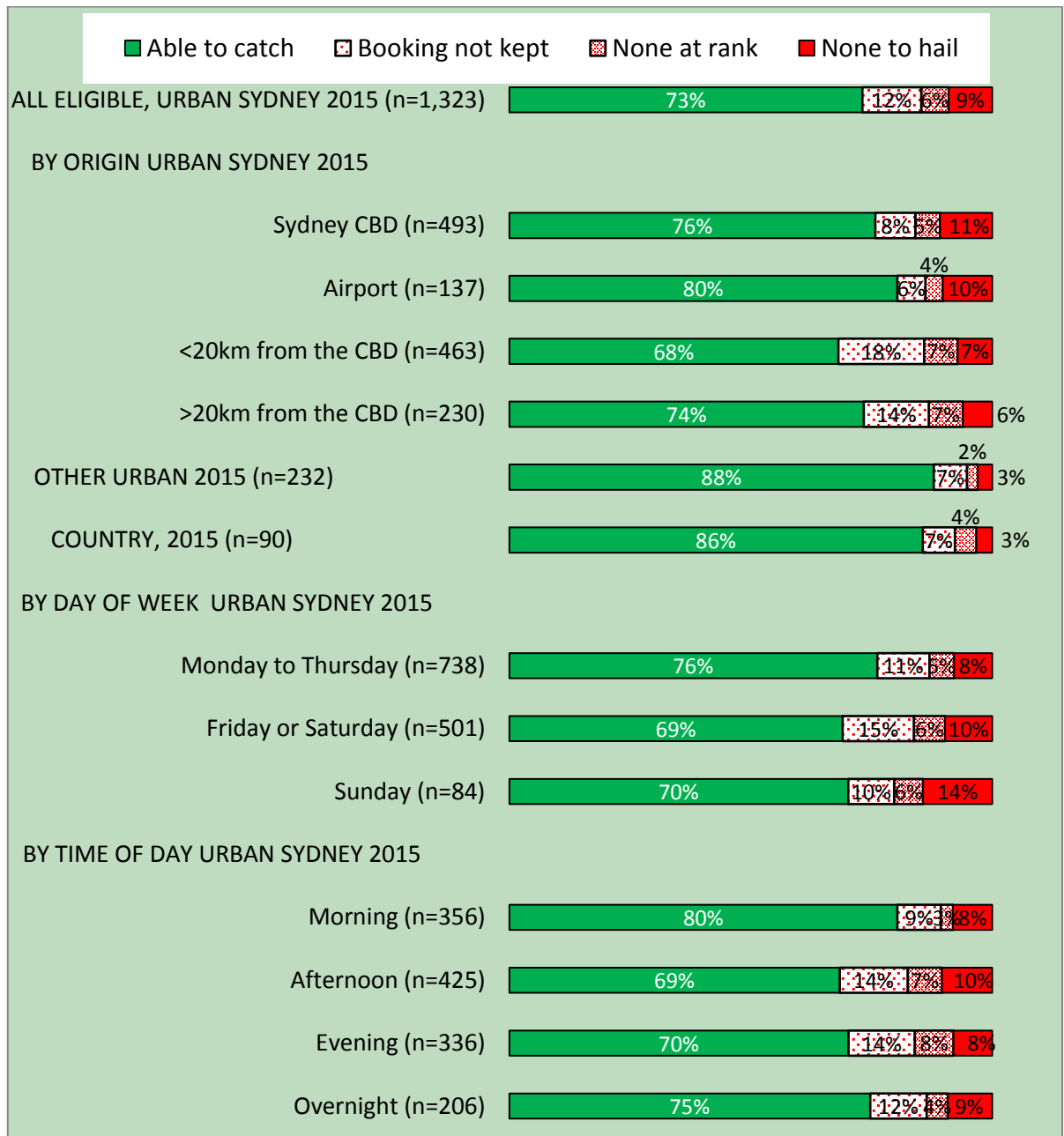
The only statistically significant difference by the origin of the trip in Urban Sydney is the lower chance of catching a taxi when wanted for those living within 20 km of the Sydney CBD (68% compared to 76%). This is a relatively small difference.

However, there is a highly significant difference for Urban Sydney taxi users by time of day in 2015 (not found in 2014), with getting a taxi when one was wanted being most common on Monday to Thursday morning (80%) and less common in the afternoon (69%) or evening (70%). Overnight performance (75%) is very close to the total Urban Sydney average (73%).

In 2015 Monday to Thursday performance is significantly better (76%) than Friday or Saturday (79%) or Sunday (70%) in 2015. While significant this is much smaller than the differences found in 2014.

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

Figure 23. Being able to get a taxi when wanted one, and reason for inability if unable, by origin, day and time, 2015



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

It is possible that the effect of time of day varied with the day of the week. This is tested by re-analysing the percentage that could not get a taxi in Urban Sydney for all combinations of time of day with day of week (see Figure 24).

The base numbers for Sunday are very small (Morning = 30, Afternoon = 22, Evening = 22 and Overnight = 10) so the results must be treated with caution.

The morning period is associated with a lower incidence of being unable to get a taxi when one was wanted than in the afternoon or evening across methods and days of the week.

In 2015 the probability of being unable to get a taxi on Friday to Saturday is higher than on Monday to Thursday for:

- ✧ overnight (26% compared to 16%)
- ✧ in the afternoon (38% compared to 28%)
- ✧ in the evening (35% compared to 27%)

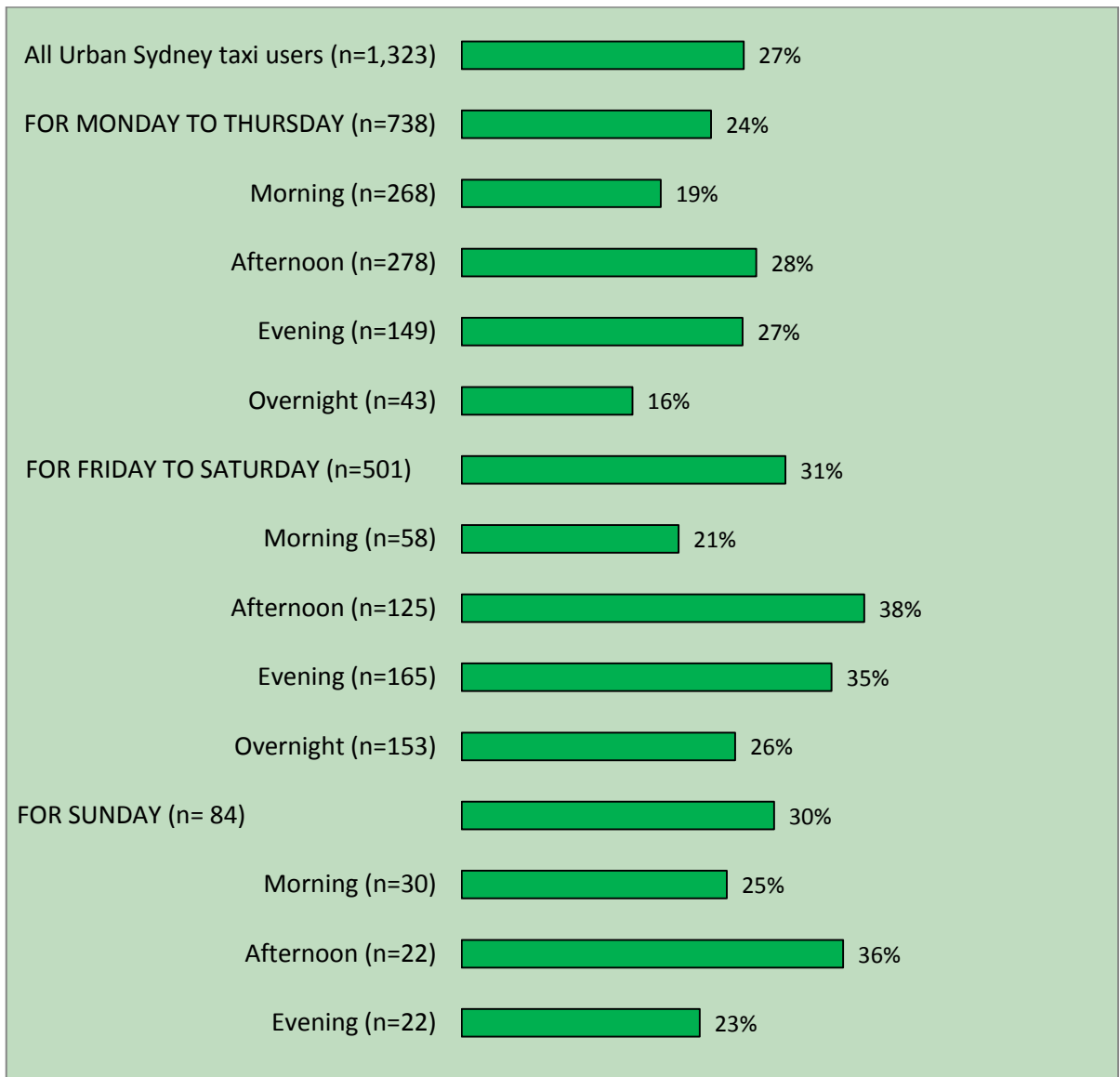
But about the same in the morning (21% compared to 19%).

Differences were also evident in 2014 results for the morning (22% compared to 15%), afternoon (35% compared to 21%) and evening (33% compared to 15%) but not overnight (20% compared to 27% - reversing the difference in other periods).

These results are consistent with the taxi fleet having more difficulty meeting demand in the afternoon and evening on Friday and Saturday than on Monday to Thursday.

All conclusions from these results must be treated with caution due to the limited sizes of the samples for many combinations of time of day with day of week. However, the consistent difference between Friday to Saturday and Monday to Thursday in the afternoon and evening suggest there might be a continuing mismatch of supply and demand at these times on Friday and Saturday.

Figure 24. Inability to get a taxi by Time and Day Urban Sydney 2015



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

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

5.13. Reasons unable to take a taxi when tried

The respondents who reported in 2015, 2014, 2013 and 2012 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.

Figure 25 shows the percentages giving each of the prompted replies for Urban Sydney and Other Urban) in 2015 (n=279 and 47) and 2014 (n=254 and n=39), in Urban Sydney in 2013 (n=209) and in Urban Sydney in 2012 (n=162).

In 2015 and 2014, 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 (2-6%) except in 2012 (when it reached 12% of those asked).

Booking a taxi that then fails to turn up is a more common issue in 2015 and 2014 Urban Sydney and Other Urban locations than in Urban Sydney in 2013 and 2014. The other two difficulties appear about equally common in 2015 and 2014. None of the problems is widespread among all taxi users, each affecting about 3 to 4% of those who have used a taxi in the past six months.

The percentage who reported being unable to take a taxi when they had tried to do so increased slightly (but not significantly) from 14% of taxi users in 2012 to 18% in 2013, 19% in 2014 and 21% of Urban Sydney taxi users in 2014. It is also reported by 19% of n=242 Other Urban users in 2015 (20% of n=199 in 2014), and by only 6% of n=202 taxi users in Country location in 2015 (8% of n=106 in 2014). Although the changes are not statistically significant, the results for Urban Sydney and Other Urban locations are consistent with a slowly increasing trend.

Within Urban Sydney in 2015, while failure to turn up when booked is the reason given most often (36%), higher than being unable to hail a passing taxi (25%) or being unable to get a taxi at a taxi rank (22%). Those in the Other Urban areas are unlikely to have been unable to get a taxi by hailing (19%) but are more likely to have difficulty at a rank (32%).

There are some interesting variations in the responses when broken down by the characteristics of the intended trip.

Failure to turn up is significantly less common for those starting from the CBD (28% of n=112 in 2015 Urban Sydney; 21% of n=89 in 2014) compared to 43% of the other 136 cases in 2015 (41% of the other 165 cases in 2014), both significant differences ($p < 0.001$).

Very few Urban Sydney respondents report not taking a taxi when at the airport (only n=11 in 2015 and n=6 in 2014).

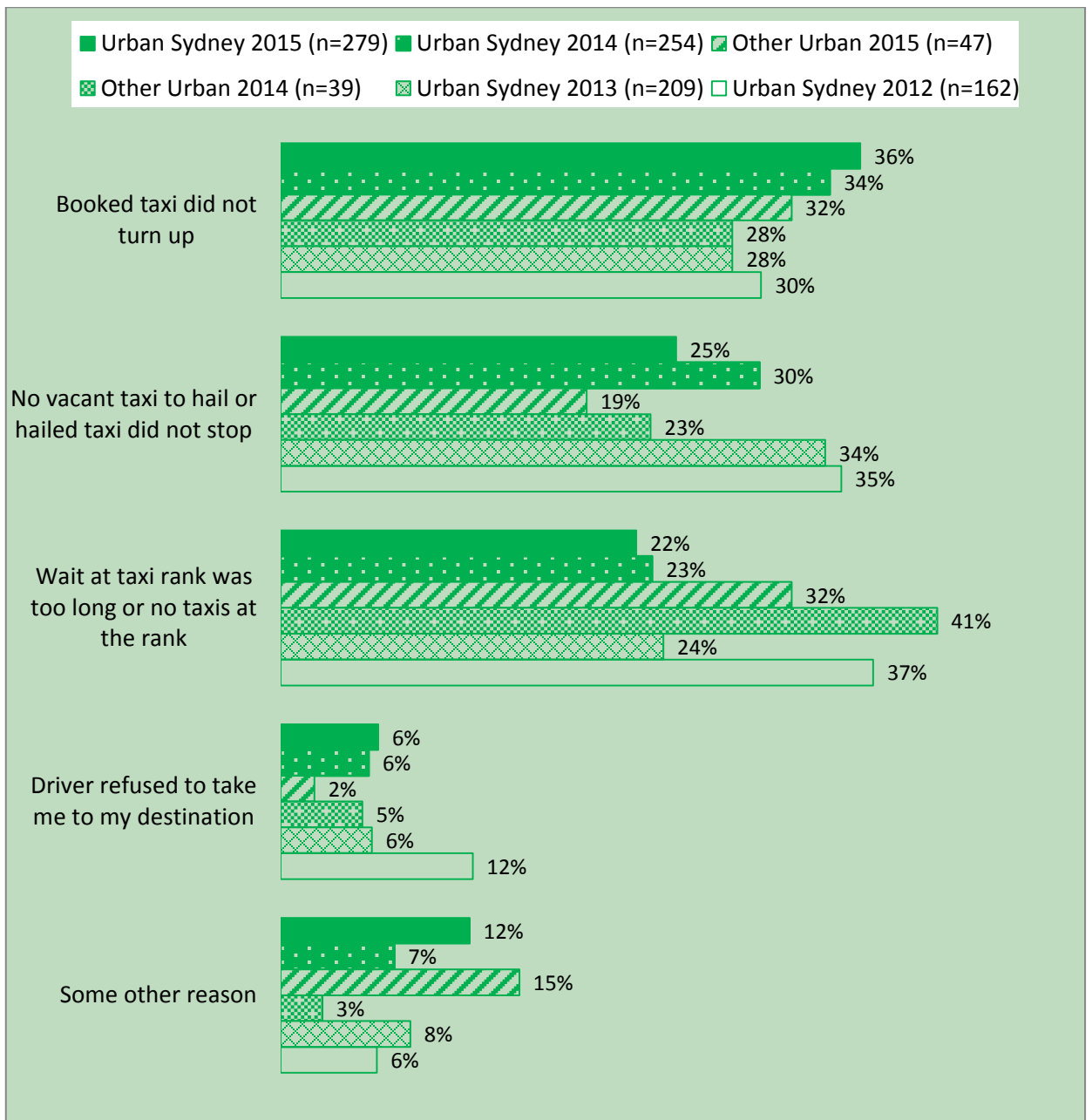
In 2015 there is little difference by day of week in failure to turn up. In 2014 failure to turn up is more common on Friday to Saturday (35% of n=118) than on Monday to Thursday (28% of n=115, $p = .07$); a similar difference in 2013 was statistically significant. It appears that this might be declining as an explanation for not taking a taxi when one was wanted.

In 2015 finding the wait at a rank too long is somewhat more common on Monday to Thursday than on Friday and Saturday (27% compared to 18%), but the difference is not statistically significant.

In 2015, being unable to find a taxi at a rank is more common in the morning (29% of n=65) and evening (27% of n=63) than in the afternoon (14% of n=92). A difference between morning (36% of n=55) and afternoon (16% of n=96) is also evident in 2014.

All these differences must be treated with caution, as data has been re-grouped to maximise the observed differences. At best these differences might suggest hypotheses to be tested in further work with larger samples. Where differences are consistently found in both 2015 and 2014, more confidence can be placed in the effect being reliable.

Figure 25. Reasons did not take a taxi when tried to do so



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]

5.14. 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.

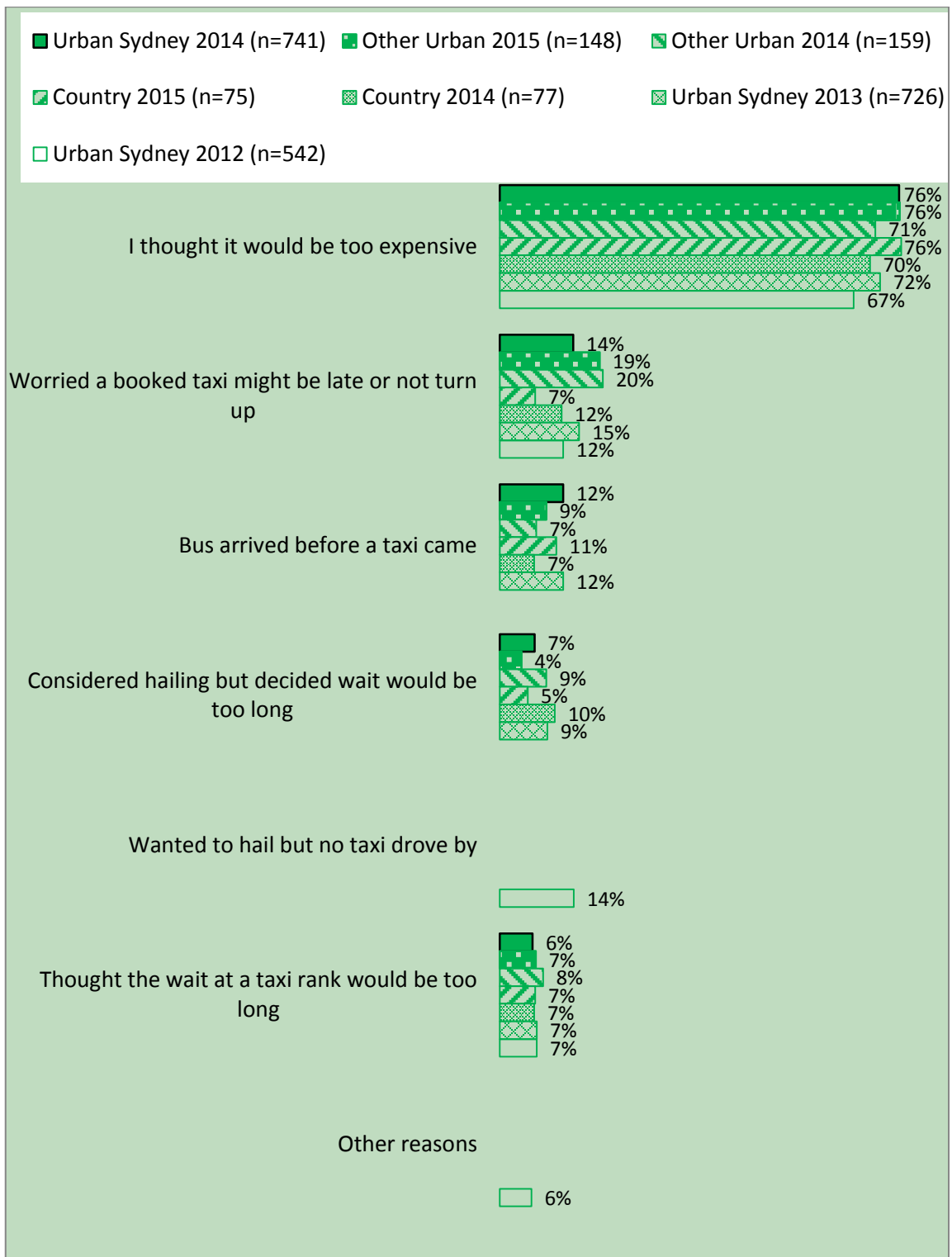
In every year, and all locations, being too expensive is the most likely reason being chosen three or more times as often as any of the reasons connected to waiting time or a booked taxi not turning up or being late.

Note that comparisons to replies given in 2012 are limited by changes in the options offered.

There are no significant or substantial changes in the results from 2013 to 2015.

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

Figure 26. Reasons decided to not take a taxi



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

5.15. Action taken instead of taking a taxi

A substantial segment in each 2015 and 2014 sample 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 (see Figure 27).

Most (90% or more in all years and locations) took the planned journey by another means, usually a bus or (in Urban Sydney) a train or by driving (especially in Other Urban and Country locations). Some walked or cycled and a few (13% or under) decided to not take the journey at all.

In Urban Sydney, the alternative adopted is typically a train or bus. In Other Urban and Country locations, driving or getting a lift dominated followed by taking a bus, with relatively few taking a train. These differences reflect access to the different modes of public transport. Hire cars and use of ride sharing or car sharing services all remain quite rare substitutes for taking a taxi.

Some differences between subgroups in the reasons endorsed are sufficiently large to merit comment. The analyses are based on the total 2015 sample across all locations, to give the maximum sample bases.

Walking or cycling is most often reported for journeys that would be under five kms (27% down from 36% in 2014) and less often for longer journeys (16% for 5 to under 10 kms, and 9% for longer distance journeys).

Taking a bus is more common for journeys under 25 kms (27% to 35%) than longer journeys (15% for journeys of 25kms or more).

Taking a train is more likely as the distance increased from under 5 kms (27%) to 25 or more kms (40%).

Driving oneself or getting a lift increases with the distance travelled from 21% (under 5 kms) to 32% (journeys over 25 kms). Using community transport (from 3% to 7%), taking a hire car with driver (from 1% to 7%), using a ride share service (3% to 7%), using a car sharing service (1% to 2%) and using courtesy transport (1% to 3%) are all relatively rare so that relationships with distance travelled cannot be considered reliable. Not making the journey at all varies from 8% to 12% as the distance travelled increases.

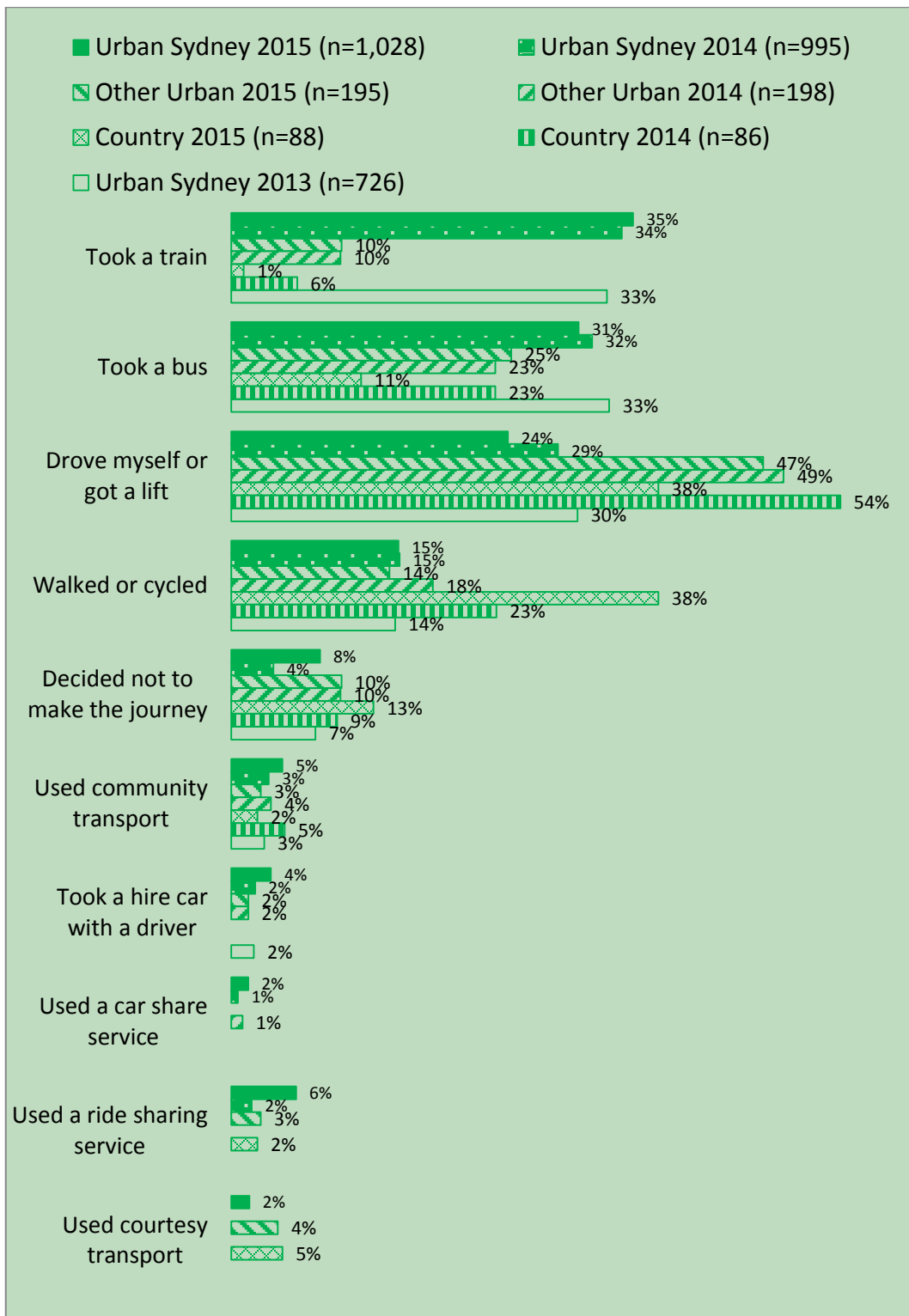
There is no significant or substantial variation in what was done between journeys taken at different times of day or on

different days of the week. A statistically significant exception is somewhat greater substitution of ride sharing services for taxi use in the evening or overnight (12% of n=240) than earlier in the day (3% of n=577). There is no difference in use of car sharing services by time of day. Differences by day of week are mostly between journeys on Sunday and other days. None of these differences approach being statistically significant (given the low base of journeys not taken by taxi on Sundays, n=50, differences would need to be quite large to be statistically significant).

There are only small differences in the replies from Urban Sydney users in 2015, 2014 and 2013.

The large differences between Urban Sydney and other locations in 2015 and 2014 align with differences in the accessibility of public transport, especially of trains.

Figure 27. Action taken instead of taking a taxi



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

5.16. Problems experienced with taxi use

In 2015, 36% of Urban Sydney taxi users (close to the 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 25% of 2015 Other Urban users (27% in 2014) and 24% of 2015 Country taxi users (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. Additional codes capture the remaining verbatim replies.

All of the additional problems are reported by less than 1% of the taxi users who report a problem.

For all Urban Sydney in 2015 the most common problem is the driver not taking the most direct route (45%). This is much lower in Other Urban (29% of problems) and Country (32%) locations. Being unable to get a taxi when one was needed is almost as prevalent in Urban Sydney (44%), and the most common in Other Urban (48%) Country (59%) locations. This was the most common problem reported in 2014 and 2013. Note that each problem is reported by no more than 16% of those who have used a taxi in the past six months.

Other problems with driver behaviour or competence are endorsed by 6% to 13% of those who had taken a taxi in the past six months. Some 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.

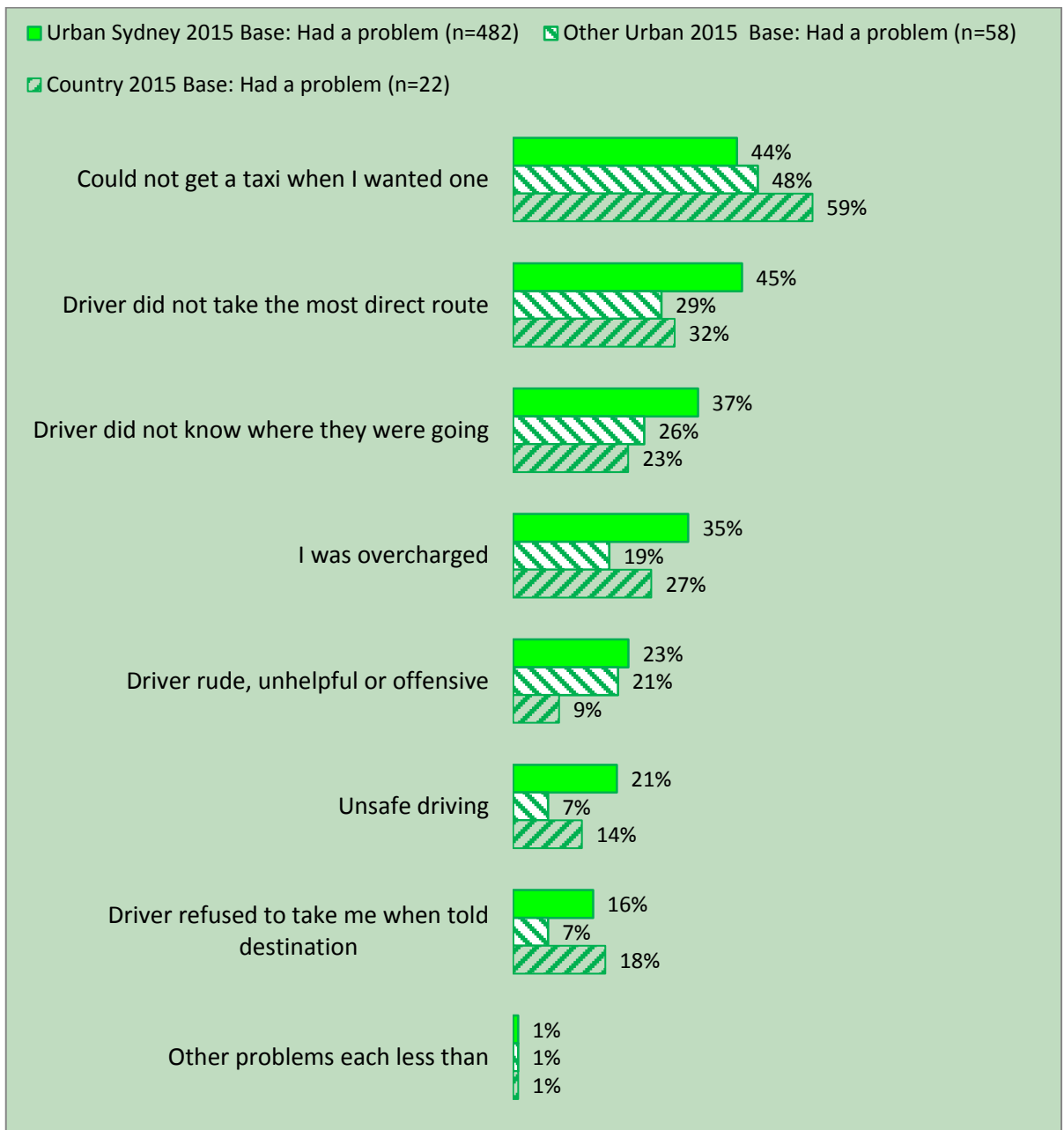
Some reported more than one problem, and might have been commenting on problems with different journeys.

Most (80% or more) of the users with a problem are able to categorise it using the list of problems provided. Not arriving when booked is the most common problem volunteered.

The distribution of problem types for those with a problem in Urban Sydney in 2015 is very close to the distribution found in Sydney in 2014. The rank order of the percentage endorsing each problem is almost the same in both years. The 36% of

Urban Sydney taxi users in 2015 who reported having a problem is almost identical to the 35% making such reports in 2014, and both are slightly below the 40% of 2013 taxi users with a problem.

Figure 28. Problems experienced with taxi use



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

5.17. 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 2015 and 2014 data (see Figure 29).

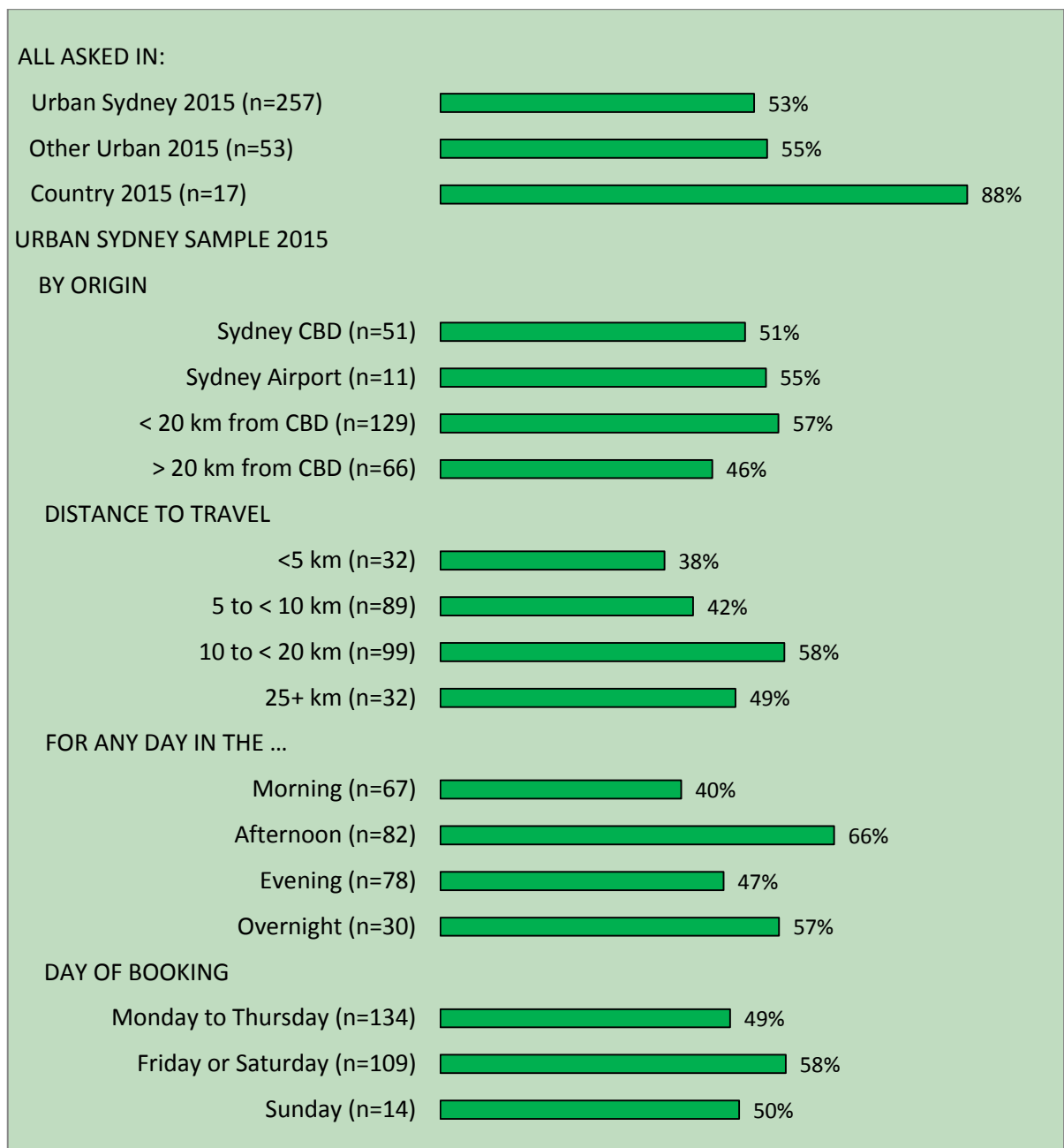
Call backs could be made because the taxi was not on time (when booked for a specific time) or did not come quickly enough (when the next available taxi was booked). These are combined in Figure 29. The base numbers are restricted as the question was only asked if the taxi was late (booked for a specific time) or took more than ten minutes to arrive (next available).

In 2015, the percentage reporting they had called back for delayed or late arrival varies somewhat with location (being most likely for those in Country locations, but with a very small sample, n=17), journey origin, distance to be travelled, time of day and day of week. However, the variations are generally not statistically significant and showed no easily interpreted patterns.

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

Calling back is somewhat more common in 2015 than in 2014, especially outside the Urban Sydney area. In Urban Sydney, 53% called back in 2015 compared to 43% in 2014. In Other Urban locations, 55% called back in 2015 compared to 36% in 2014. The substantial difference for Country locations (88% compared to 32%) could simply be fluctuation due to the small samples experiencing a delay (n=17 in 2015). However, the trend is clear: calling back if the taxi is late or takes more than 10 minutes to arrive is more common in 2015 than it was in 2014 or 2013.

Figure 29. Calling back for non-arrival



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.

5.18. Satisfaction with waiting time

Those who recall taking a taxi journey in the previous six months (but excluding n=36 who did not know how a taxi had been booked because it was done by someone else) were asked to rate how satisfied they were with the time they had to wait the last time they had used a taxi.

The ratings given for those who had taken a taxi in 2015 are shown in Figure 30, 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 those breakdowns.

Overall almost three in four (73% to 76%) are at least slightly satisfied with the waiting time and half or more (Urban Sydney 52%, Other Urban 63%, Country 60%) are satisfied or very satisfied in 2015.

Satisfaction with the waiting time the last time they tried to catch a taxi is much lower if they are unable to catch one (38% to 54%) than if they had been able to get a taxi (82%). Note that those rating satisfaction with waiting time should be considering the last actual taxi trip taken, which would be for a different occasion to the last intended trip where they could not get a taxi.

There is some variation by the reason for being unable to get a taxi although users are more likely to be dissatisfied at all (slightly to very dissatisfied 63%) and very dissatisfied (17%) if they had booked a taxi that did not turn up. Being unable to get one on the street also produces dissatisfaction, but not quite as often (46% to 51%) and not as strongly (7% and 5% very dissatisfied).

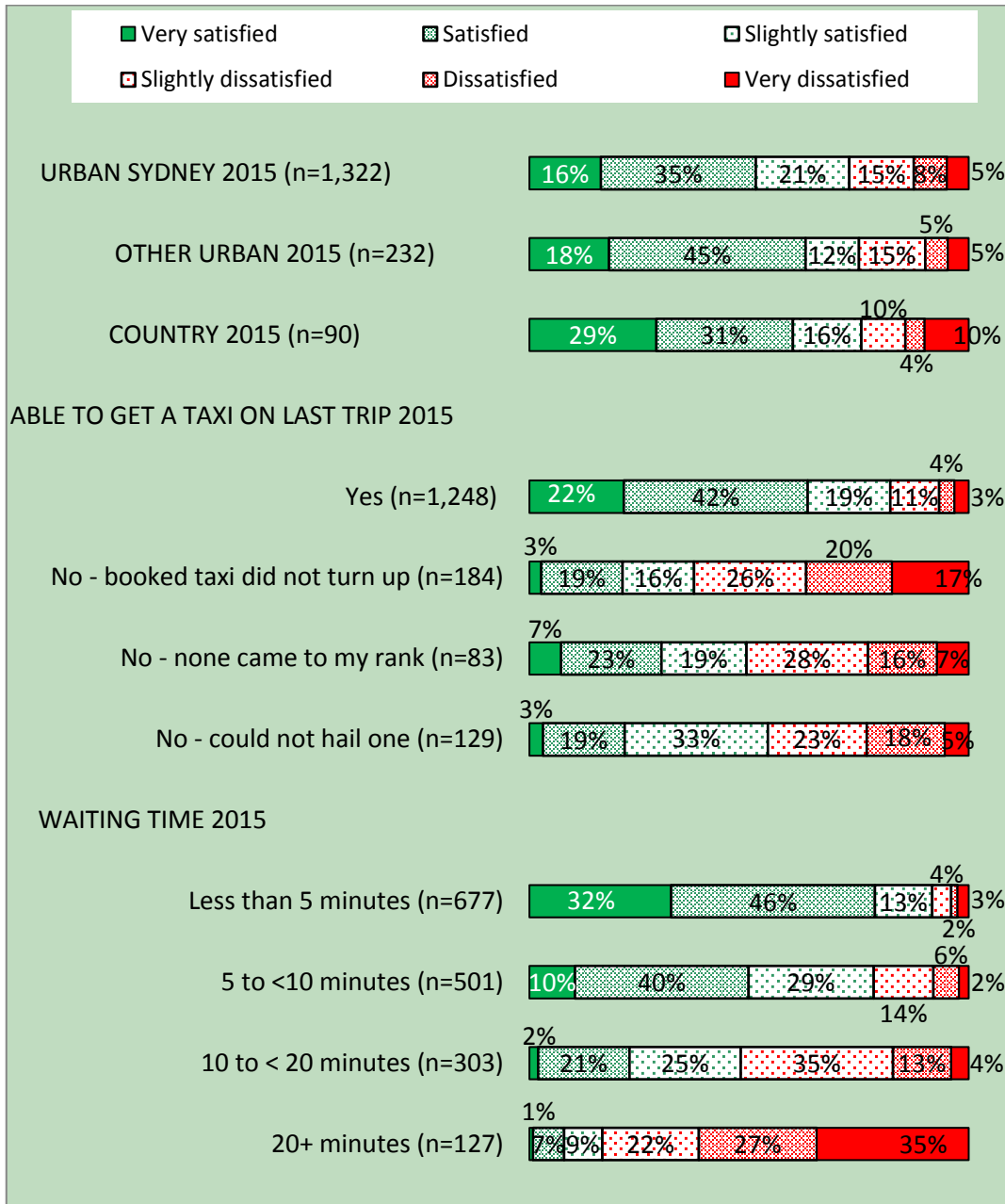
Satisfaction varies most with the reported waiting time. Being very satisfied is high for waits of under five minutes (32%), and falls to 1% to 10% for longer waiting times. Being satisfied or very satisfied is a very high 79% for waiting times under five minutes, 50% for five to under 10 minutes, 23% for 10 to under 20

minutes, and 8% for 20 minutes or more. Being very dissatisfied is relatively common for waits of 20 minutes or more (35%) and very rare for waits of less than 20 minutes (2% to 4%). Being more than slightly dissatisfied falls from 61% of those waiting 20 minutes or more to 17% if waiting 10 to under 20 minutes, 8% if waiting five to under 10 minutes and 4% 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.

There is little difference in overall satisfaction between Urban Sydney in 2015, 2014 and 2013.

Figure 30. Satisfaction with waiting time by location, ability to get a taxi and waiting time

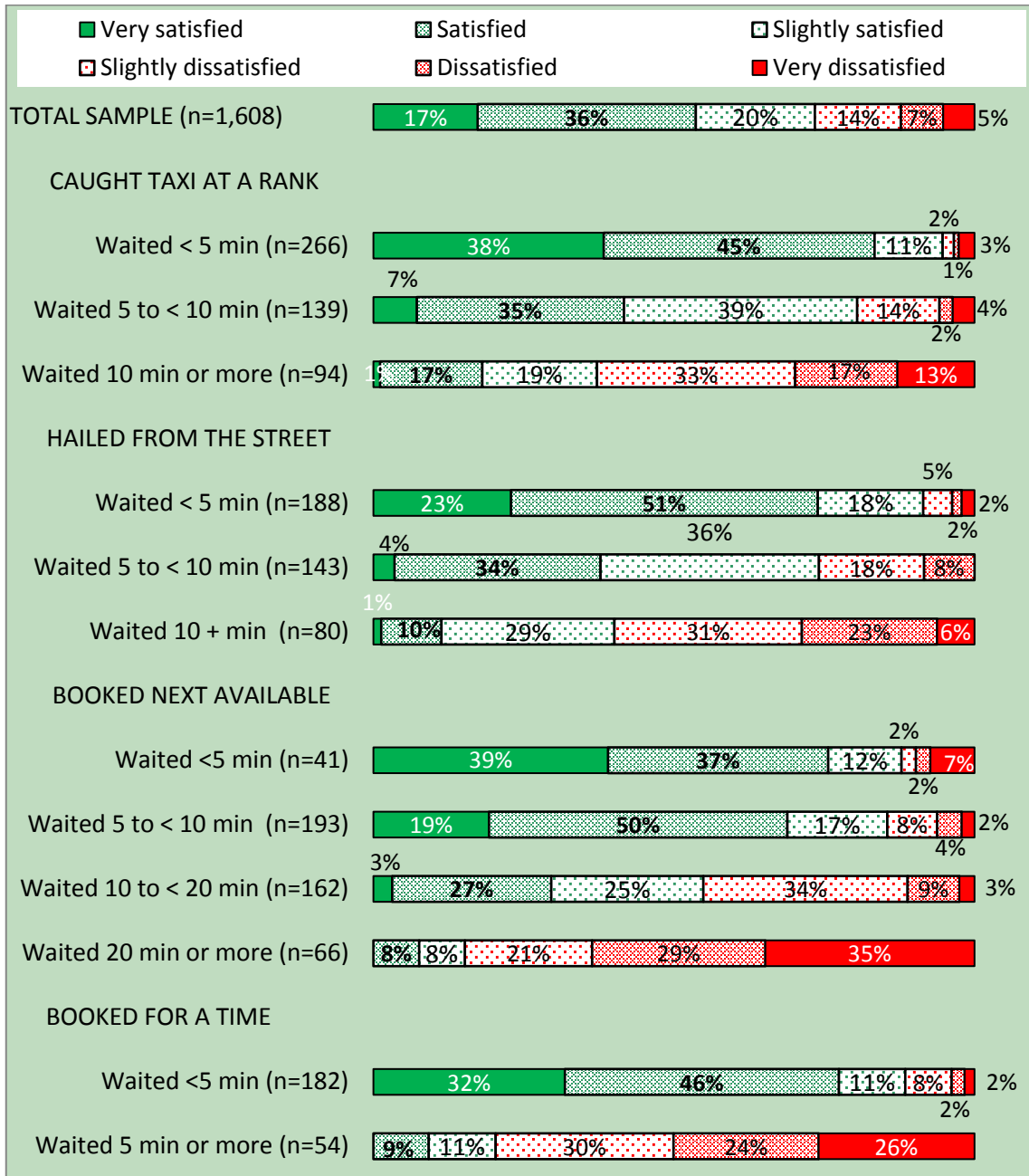


Q25. For the time I had to wait to catch this trip, I was

Figure 31 summarises how satisfaction with waiting time varies with the time taken to obtain a taxi for each different way of obtaining a taxi (at a rank, hailing from the street, booking the next available taxi, and booking for a specified 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.

Figure 31. Satisfaction with waiting time by how obtained by waiting time 2015 (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.

The total dissatisfied increases sharply with waiting time for each method of obtaining a taxi. At least 56% 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.

The distribution is very similar across the different ways of catching a taxi if the wait is under five minutes (not shown for “booked next available” as the base is only n=15).

Those who book for a specific time being dissatisfied with any wait that reaches five minutes or more is about as likely as being dissatisfied for those obtaining a taxi by other means who wait for 20 minutes or more. Having a commitment to arrive at a particular time understandably results in less patience with any more than a minor delay.

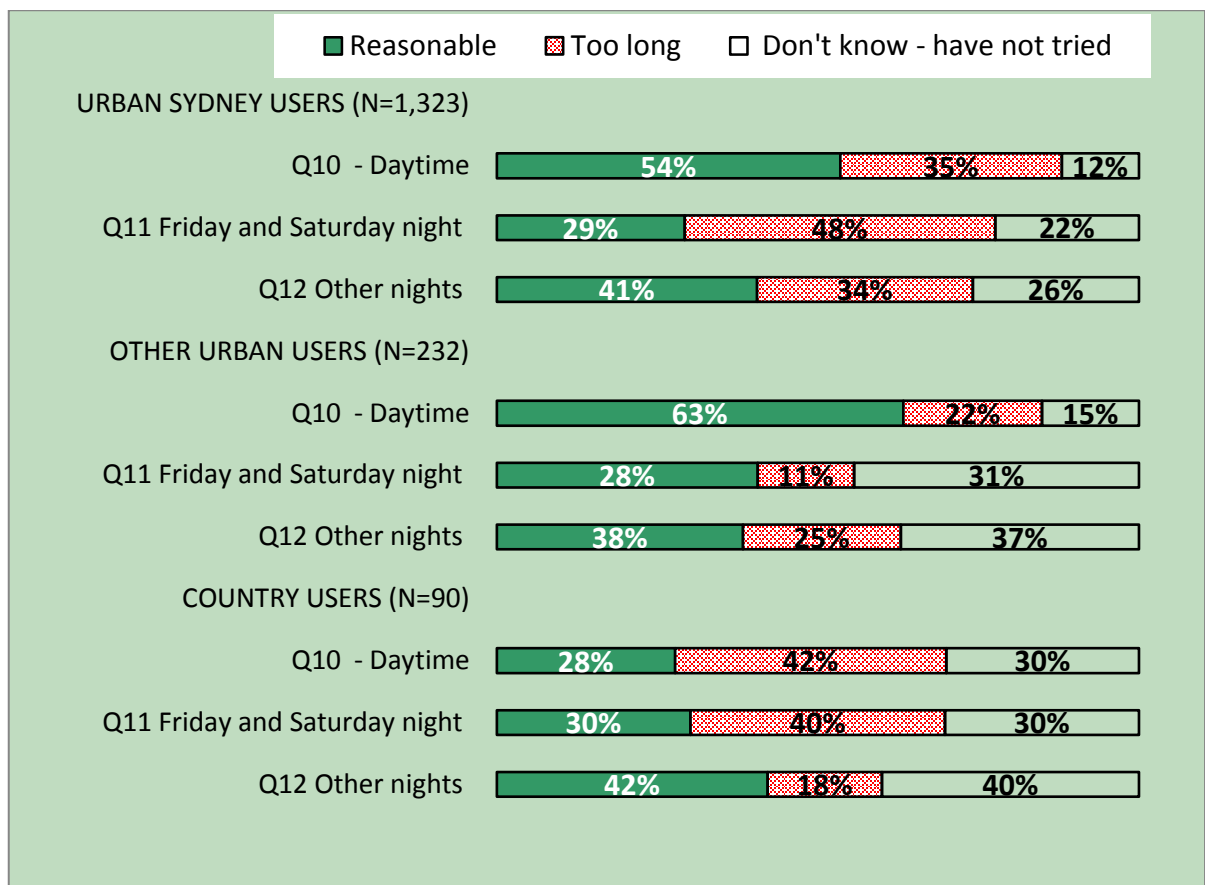
5.19. Whether waiting times reasonable

In 2015, 2014 and 2013 respondents 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 32 shows the distribution of replies in 2015.

Among those with relevant experience, in Urban Sydney, waiting times on Friday and Saturday nights are more likely to be considered unreasonable than reasonable (48% to 29%) while at other times the balance is reversed (35% unreasonable to 54% reasonable for daytime journeys, and 34% unreasonable to 40% reasonable for Urban Sydney journeys on other nights). Other Urban users with relevant experience were consistently more likely to consider waiting times reasonable than unreasonable. Country users were more likely to consider waiting times unreasonable than reasonable for journeys taken in the daytime (42% unreasonable compared to 28% reasonable) and on Friday and Saturday nights (40% unreasonable compared to 30% reasonable), but showed the reverse pattern on other week nights (18% unreasonable compared to 42% reasonable). This confirms one aspect of previous findings – that those in Urban Sydney are more likely to consider waiting times unreasonable than reasonable on Friday and Saturday nights than at other times of the week.

Figure 32. Whether waiting times considered reasonable, 2015



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]

Over half considered the waiting times reasonable in the daytime when the day was not specified except in the Country locations where only 28% considered the waiting time reasonable. This falls to just over one in four for Friday and Saturday night (28% to 30% depending on location) and to around 40% (38% to 42%) for other nights for those in Country towns. By contrast with the results for Country locations in 2014, in 2015 Country users are less likely to consider waiting times reasonable if the day is not specified and less likely to consider waiting times too long for nights other than Friday and Saturday. Those in Other Urban locations in 2015 are less likely than other users to consider waiting times on Friday and Saturday night to be too long

The results for Urban Sydney are very similar to those found in 2014 and 2013.

5.20. Fares paid and payment method

Users were asked how much they had paid for their last trip, and what method they used to pay. Figure 33 shows the distribution of fares reported in the 2015 survey for Urban Sydney, Other Urban and Country locations.

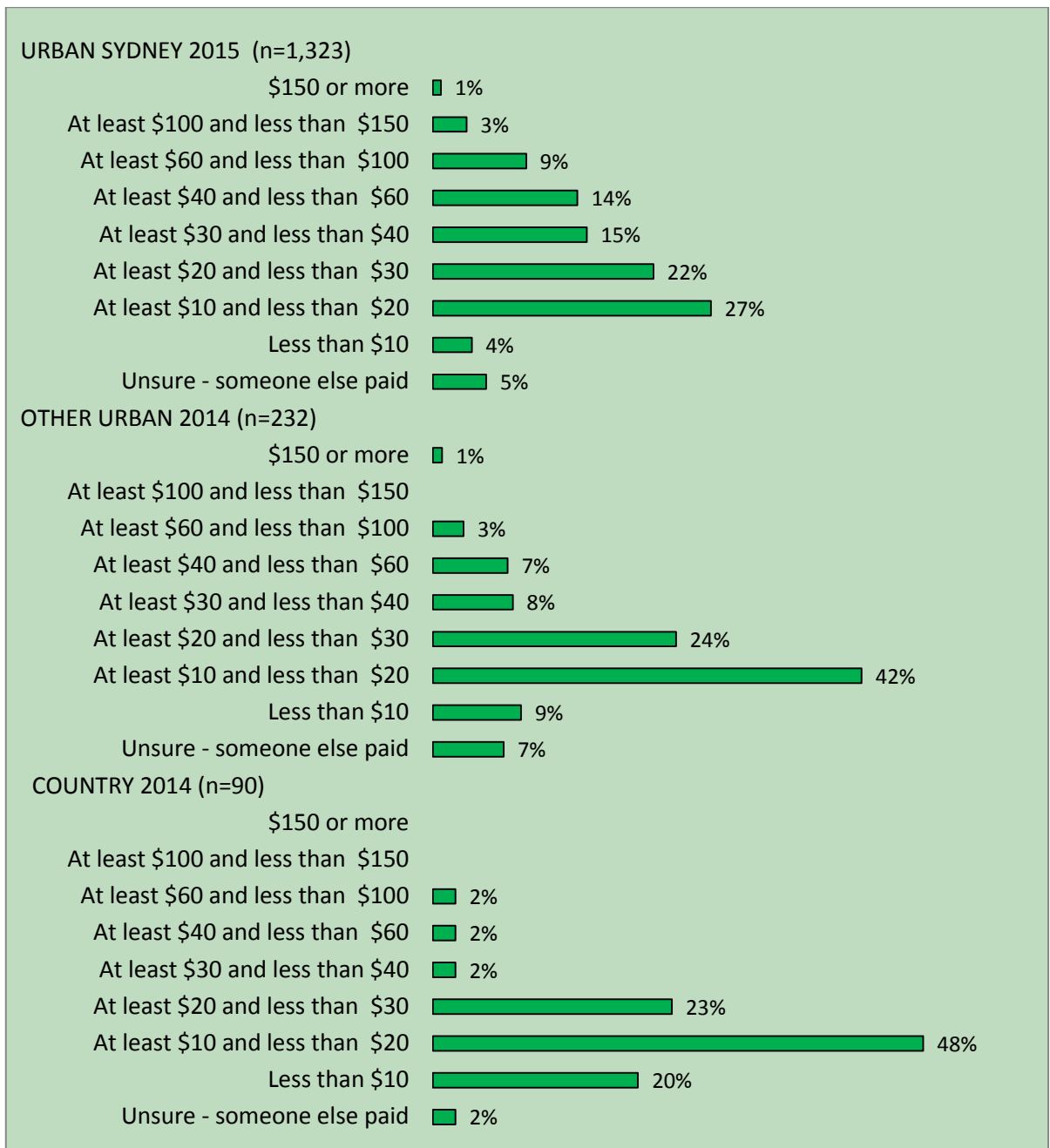
The median fare in 2015 in Urban Sydney is just under \$30, the same as in 2014. In Other Urban locations the median fare is around \$20 and in Country locations between \$10 and \$20. In Urban Sydney, there are some fares over \$100 and a few over \$150. In Other Urban and Country locations, fares rarely exceed \$100 and are mostly under \$40.

Fares are most likely to be paid in cash, with the proportions doing so being larger outside Sydney than in Urban Sydney (see Figure 34). Credit cards are about twice as likely to be used in Urban Sydney (22%) as in the other locations (14% and 8%), but debit cards are about equally used in Sydney as in Country locations (6% to 7%) and to be used more in Other Urban locations (12%).

Cabcharge is more likely to be used in Urban Sydney (7%) than in the Other Urban (3%) or Country (0%) locations.

Some taxi users in Urban Sydney (11%) use a smart phone app to pay the fare. This payment method is not reported in the Other Urban and Country locations. Few use some other means not listed (7% in Urban Sydney, none in Other Urban and 3% in Country locations).

Figure 33. Amount paid on last taxi trip by location, 2015

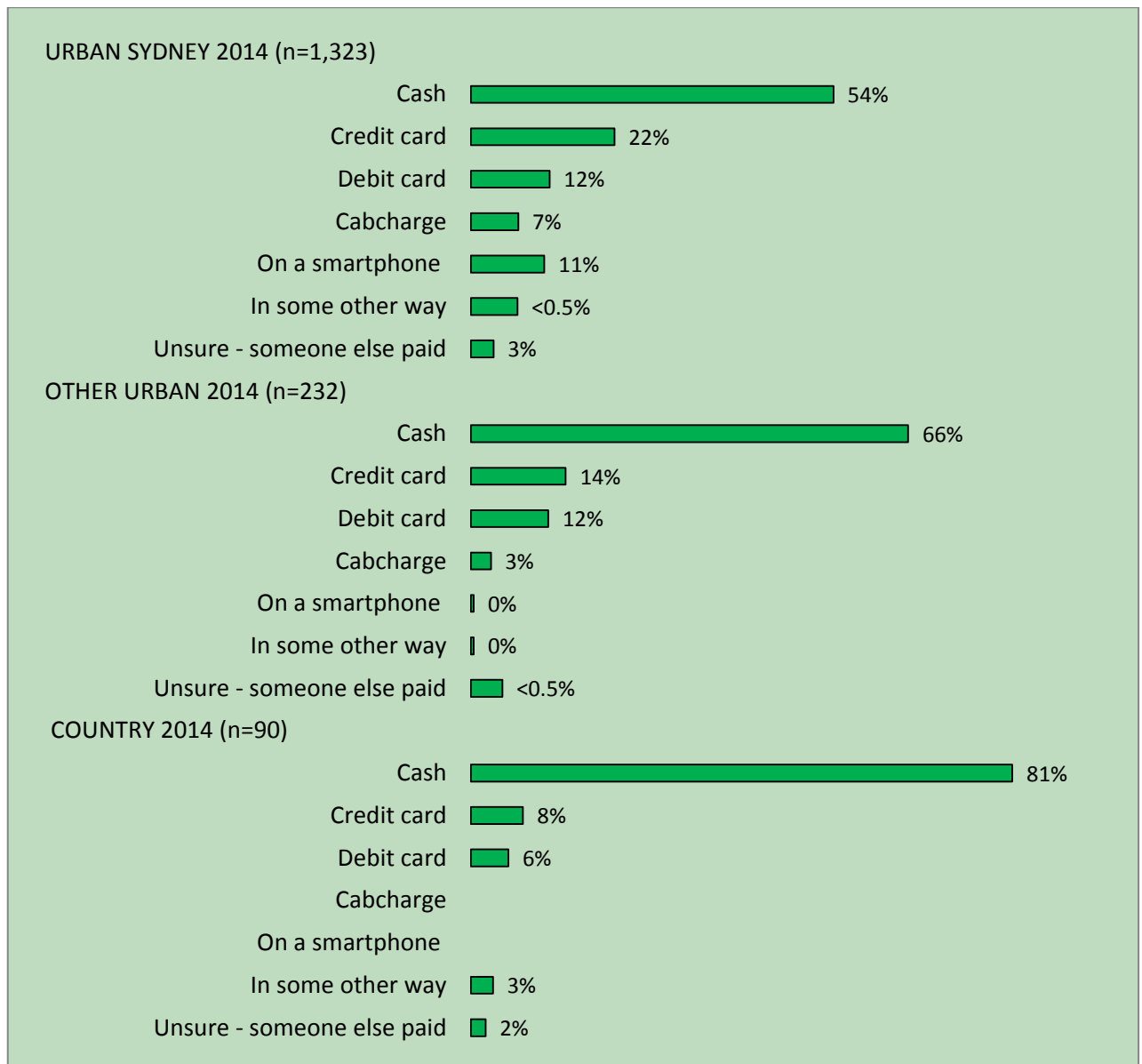


Q26 The fare, including any service fee for electronic payment, was ...

As in 2014, in 2015 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 increased:

- ✧ 86% use cash and 8% a card for fares under \$10 (n=88)
- ✧ 73% use cash and 22% use a card for fares of \$10 to under \$20 (n=498)
- ✧ 58% use cash and 34% cash for fares of \$20 to under \$30 (n=361)
- ✧ 58% use cash and 46% a card for fares of \$30 to under \$40 (n=361)
- ✧ 45% use cash and 40% use a card for fares of \$40 to under \$60 (n=425)
- ✧ 39% use cash and 42% a card for fares of \$60 or more (n=186)

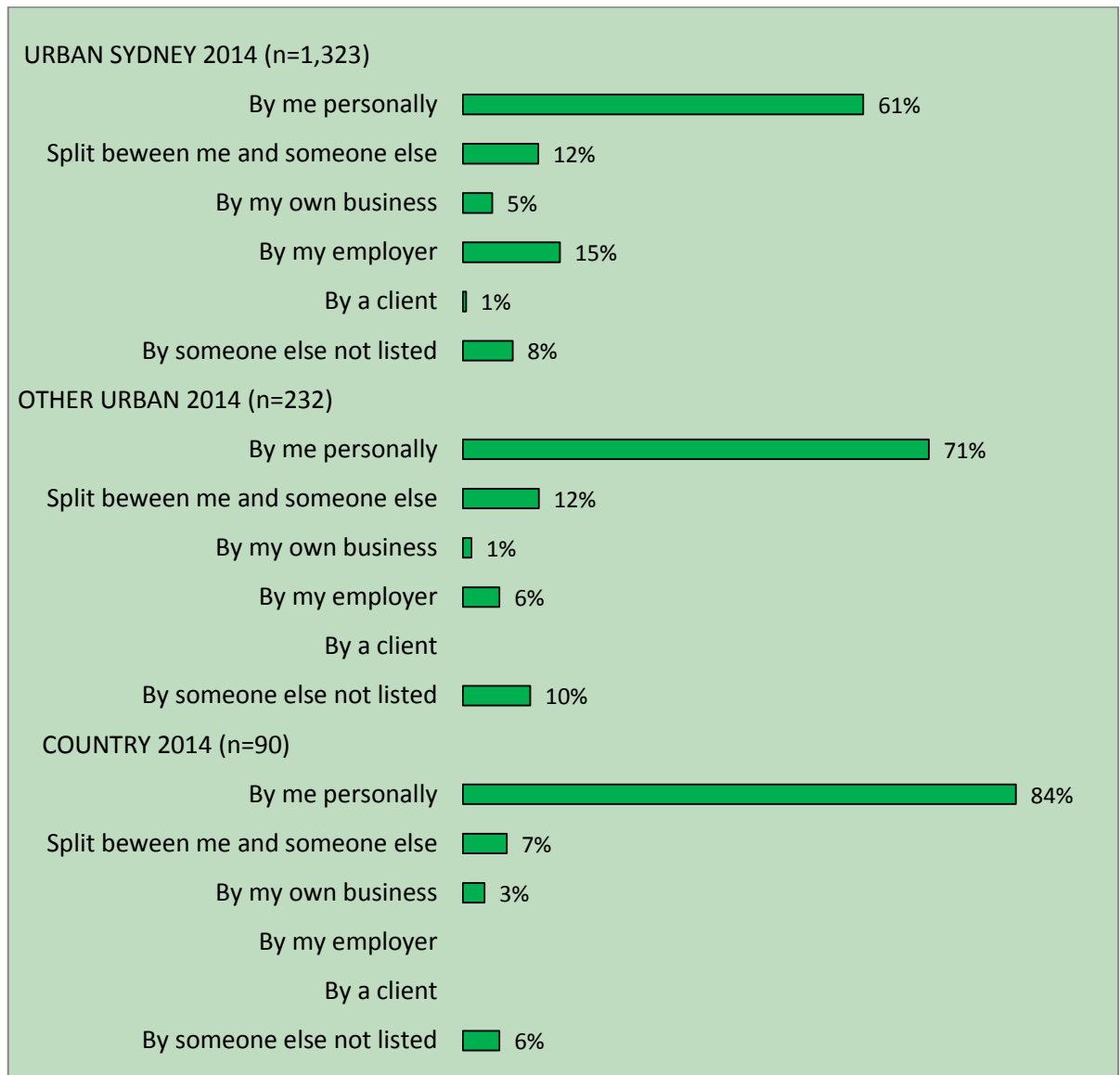
Figure 34. How fare paid on last taxi trip by location, 2015



Q27 The fare was paid by

Over half the respondents paid for their last trip themselves (see Figure 35) with this being even more likely in Country (84%) and Other Urban (71%) locations than in Urban Sydney (61%). While 15% 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; 7% to 12% split the fare with someone else and a few fares (6% to 10%) were paid by someone else not listed (see Figure 35).

Figure 35. Who covered the fare on last taxi trip by location, 2015



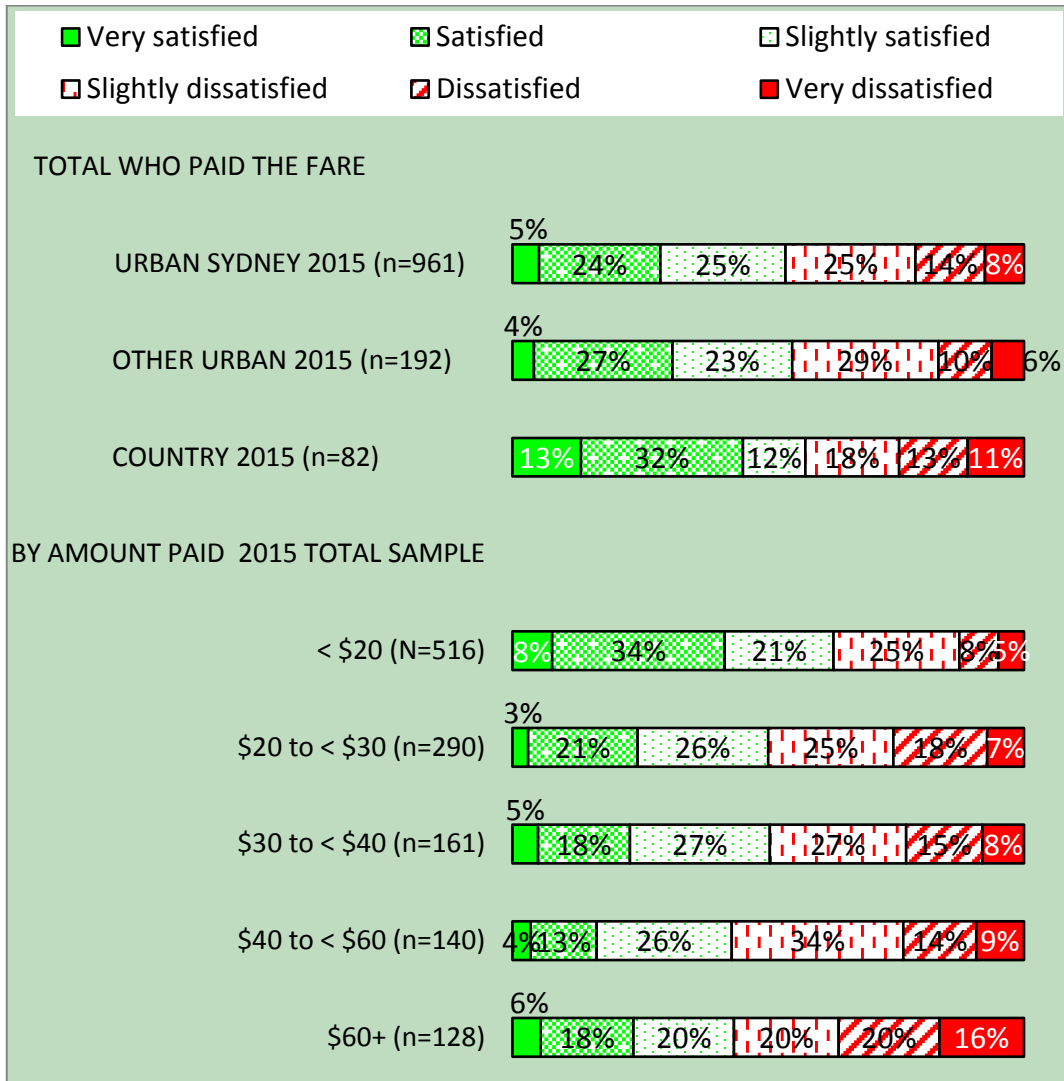
Q28 The cost of the trip was covered ...

As Figure 36 shows, in Urban Sydney, satisfaction and dissatisfaction with the fare paid is about equally balanced (satisfied 53%; dissatisfied 47%) while small majorities are satisfied in the other two locations (55% in Other Urban and 57% 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 2014.

Those who pay under \$20 are the most likely to be very satisfied or satisfied (42% of n=516) with little difference by fare paid above \$20 (23% to 25% except for those paying \$40 to under \$60, 17%). Being dissatisfied or very dissatisfied increased

from 13% if the fare is under \$20, to 23% to 26% for fares of \$20 to under \$60 and 36% for fares over \$60 or more. Thus the strength of dissatisfaction increases with the fare paid and stronger satisfaction is reduced if the fare paid is \$20 or more.

Figure 36. Satisfaction with fare paid by amount paid 2015

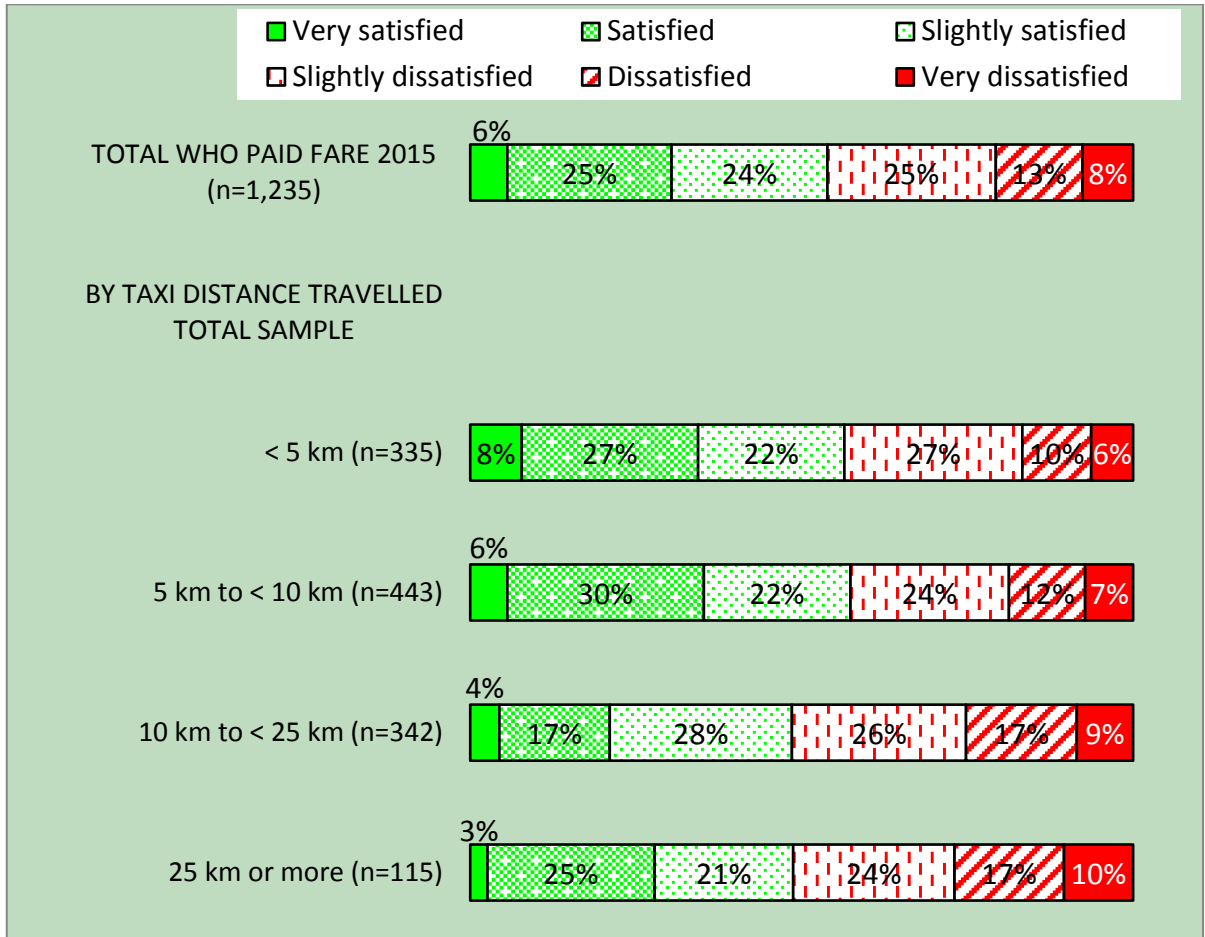


Q29. For the amount I paid for this trip, I was

When data from all locations in 2015 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 37). Being very satisfied or satisfied showed the reverse pattern. While statistically significant, the effect is not large, with 57% satisfied with the fare on journeys under 10 kms and 49% for longer journeys.

There is little difference in the distribution of satisfaction with the fare paid in Urban Sydney 2015, 2014 and 2013.

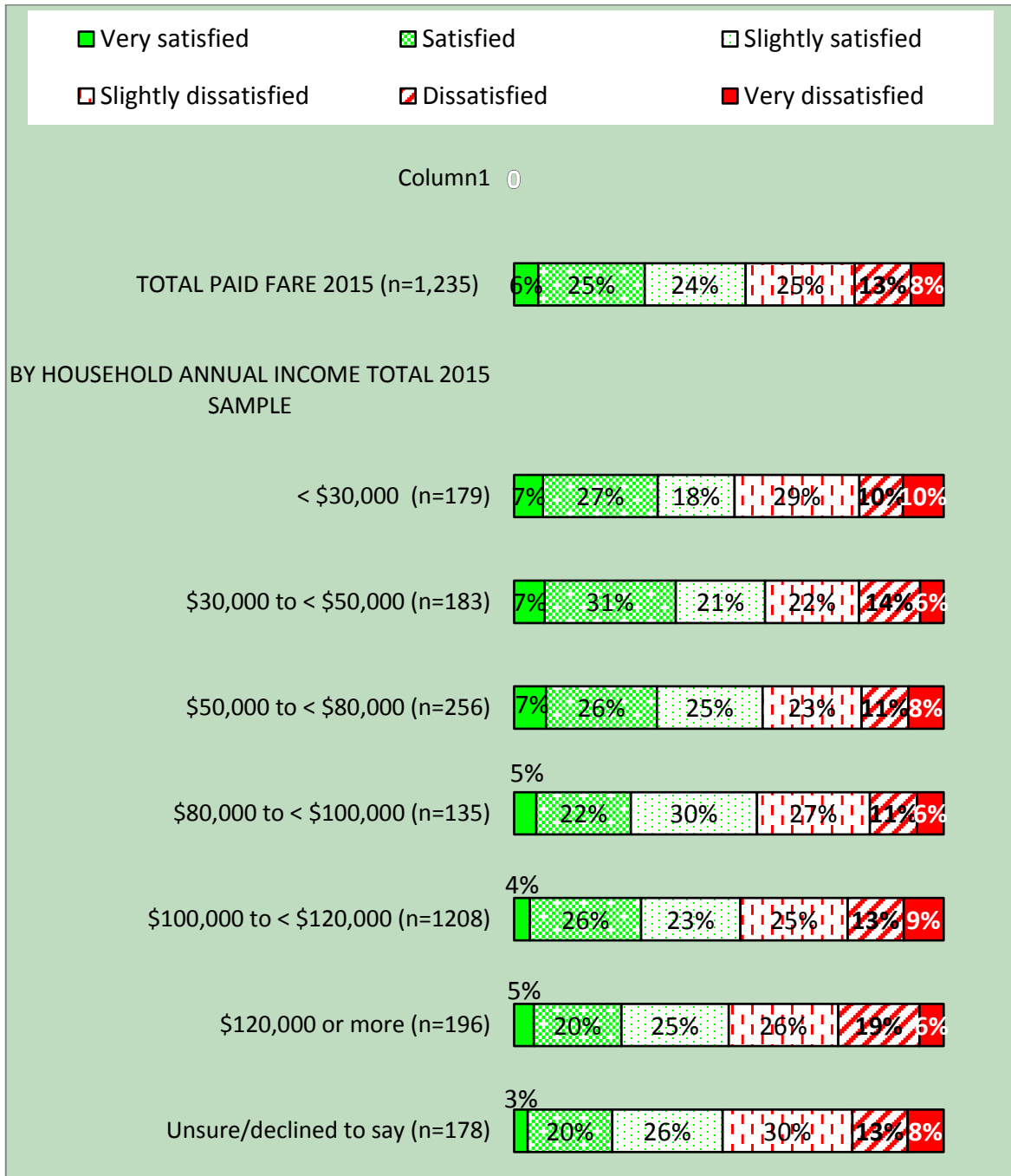
Figure 37. Satisfaction with fare paid by distance travelled, 2015



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

Household income showed little relationship to satisfaction with the fare paid (see Figure 38).

Figure 38. Satisfaction with fare paid by household annual income, 2014



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 28% for those

making the crossing going south (n=132), 27% for those making the crossing going north (n=79), and 25% for those not making the crossing (n=314). Being very satisfied or satisfied is respectively 23% if going north, 22% if going south and 23% if not making the crossing.

AS in 2014, there is no evidence that paying the toll affects satisfaction with the fare paid.

5.21. Purpose of trip

When asked about the purpose of the trip, recreation is the most often chosen of the prompted options offered in all years and in all locations (see Figure 39). While there is some variation, this is consistent with chance effects (43% to 59%) given that only one sub-group (Country in 2014) is above 52%.

Work related trips come next. The percentage varies little for Urban Sydney across the four survey years (21% to 24%), but is consistently lower in Other Urban (13% in both 2015 and 2014) and Country locations (6% and 9% in 2015 and 2014).

Getting to and from (personal) appointments account for some with an increasing (but not statistically significant) trend in Urban Sydney (from 13% in 2012 to 17% then 16% and 19% in 2015). Other Urban trips to and from appointments is steady (18% 2015, 21% 2014) while there is an apparent increase for Country locations from 16% to 28%.

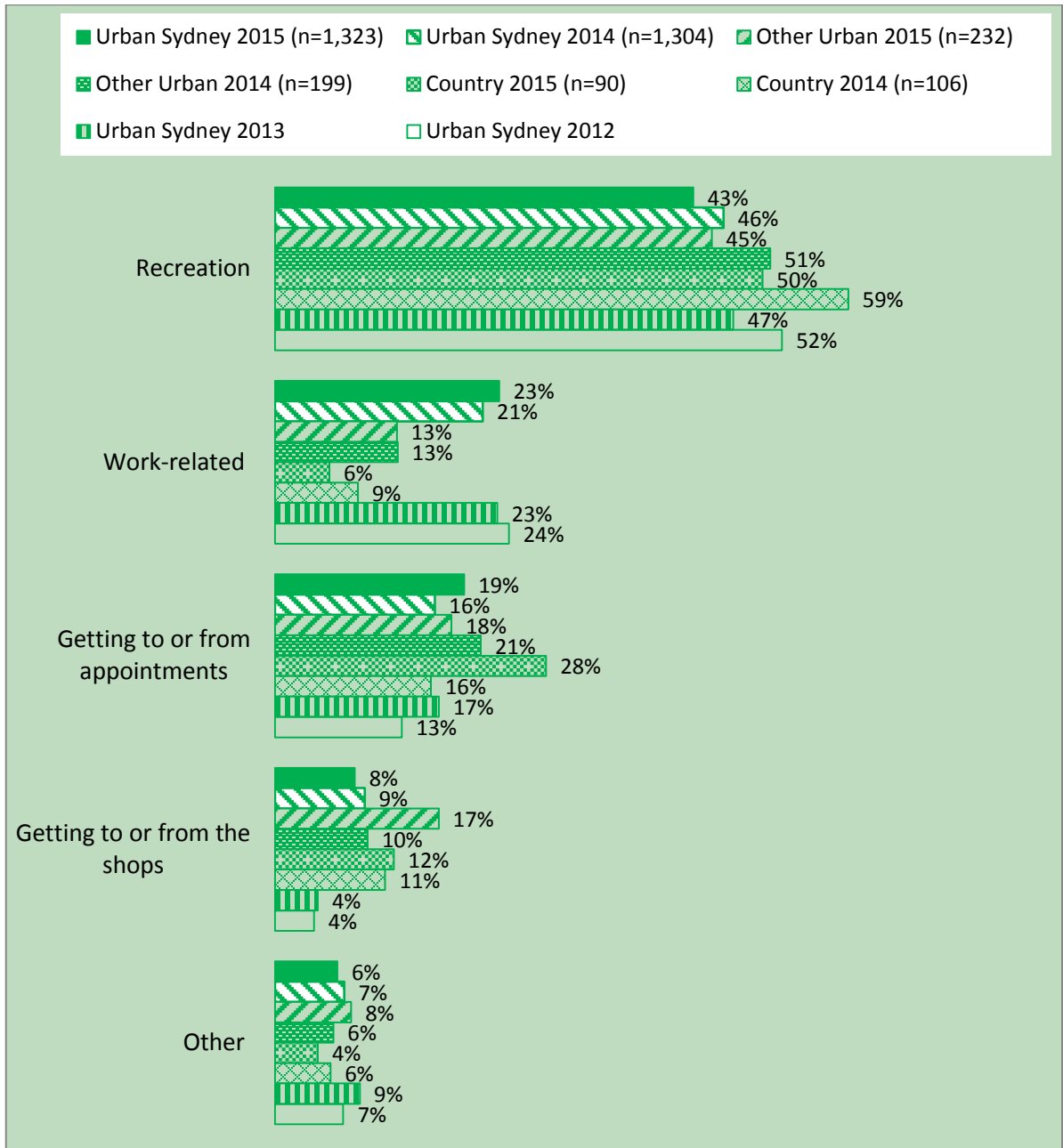
Shopping trips are taken by a few (4% in 2012 Urban Sydney to 17% in 2015 Other Urban). While there is some variation this purpose is consistently the least likely to be reported.

Given the overall results, the variations noted might be entirely due to chance.

Trips taken for work or business in 2015 are more likely than others to be paid for by the business (54%), followed by getting to and from (perhaps work related) appointments (13%) and shopping (12%). Only 3% to 4% of trips for other purposes are paid for by the employer or the respondent's own business.

Trips for socialising are the most likely to be split with someone else (16% compared to 4% to 11% of trips for other purposes). Being paid for by someone not listed is most common for recreation (11%) and other purpose trips (15%).

Figure 39. Purpose of trip



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)

Other (such as education related)

5.22. Reason for taking a taxi

Respondents were asked to choose from a short list their main reason for taking taxi on their most recent taxi trip. The results are summarised in Figure 40.

In Urban Sydney, taxi use is most often attributed to convenience in all locations from 2013 to 2015 (38% to 39%). Being quicker or more direct than other transport comes second (29% to 31%). Some considered taking a taxi as their only option (20% to 22%).

Those in Other Urban and Country locations are also most likely to give convenience as their main reason for taking a taxi (37% to 41%). Having no other option is consistently next (30% to 39%), ahead of being quicker or more direct (14% to 21%). Little change is evident from year to year. Being cheaper is rarely reported (zero to 5%) and having a reason not listed is also relatively rare (6% to 10%).

There are some differences in the reasons given by frequency of use. In the total 2015 sample, the percentage reporting being “quicker or more direct” as their main reason steadily increases from a low of 27% for those using less than once a month to 38% for those using more than five times a week. While this effect is not as strong in 2015 as was found in 2014, the direction of effect is the same in both years,

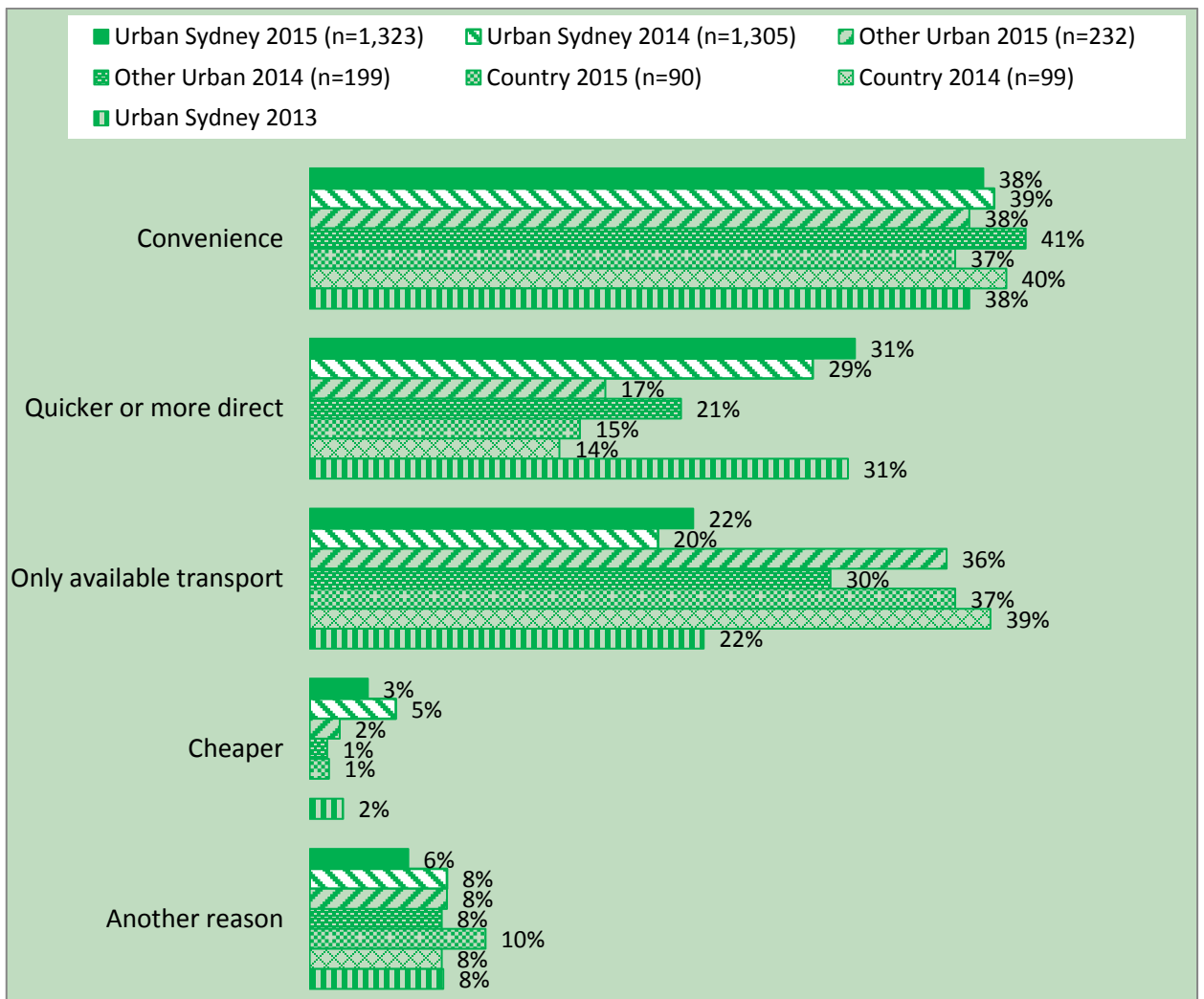
Lack of access to other means of transport is consistently more likely to be selected by those living in Other Urban or Country locations wherever they board the taxi (38% of n=312) and least often by those boarding in the Sydney CBD (14% of n=493). For those in Urban Sydney, lack of other options increased with distance from the CBD (22% of n=463 boarding less than 20 kms and 35% of n=230 boarding more than 20 kms from the CBD, and 24% for n=137 boarding at Sydney airport). Being quicker or more direct declined with distance from the CBD in Urban Sydney (42% of n=493 boarding in the CBD, 26% of n=463 within 20 kms, 20% of n=230 more than 20 kms, 27% if boarding at Sydney airport, n=137). This reason is reported consistently less in Other Urban and Country locations (17% of n=312).

As in 2014, being quicker or more direct is significantly more often cited as a reason for taking a taxi (34% of n=729) if travelling less than 10 kms and less often by those travelling longer distances (27% of n=594) but the effect remains small.

Those travelling on a Friday or Saturday are less likely to give being quicker or more direct as their reason (22% of n=628 in the total 2015 sample) than those travelling on Monday to Thursday (32% of n=921).

Use of a taxi on trips commenced overnight is significantly more likely to be explained as due to lack of other options (33% of n=206 in Urban Sydney) than trips started at other times (20% of n=1,117). Those taking a taxi overnight are also less likely than those travelling in the morning to give being quicker or more direct as a reason (21% of n=206 compared to 37% of n=356) with those travelling at other times being in between (29% to 33%).

Figure 40. 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

5.23. Crossing the Harbour

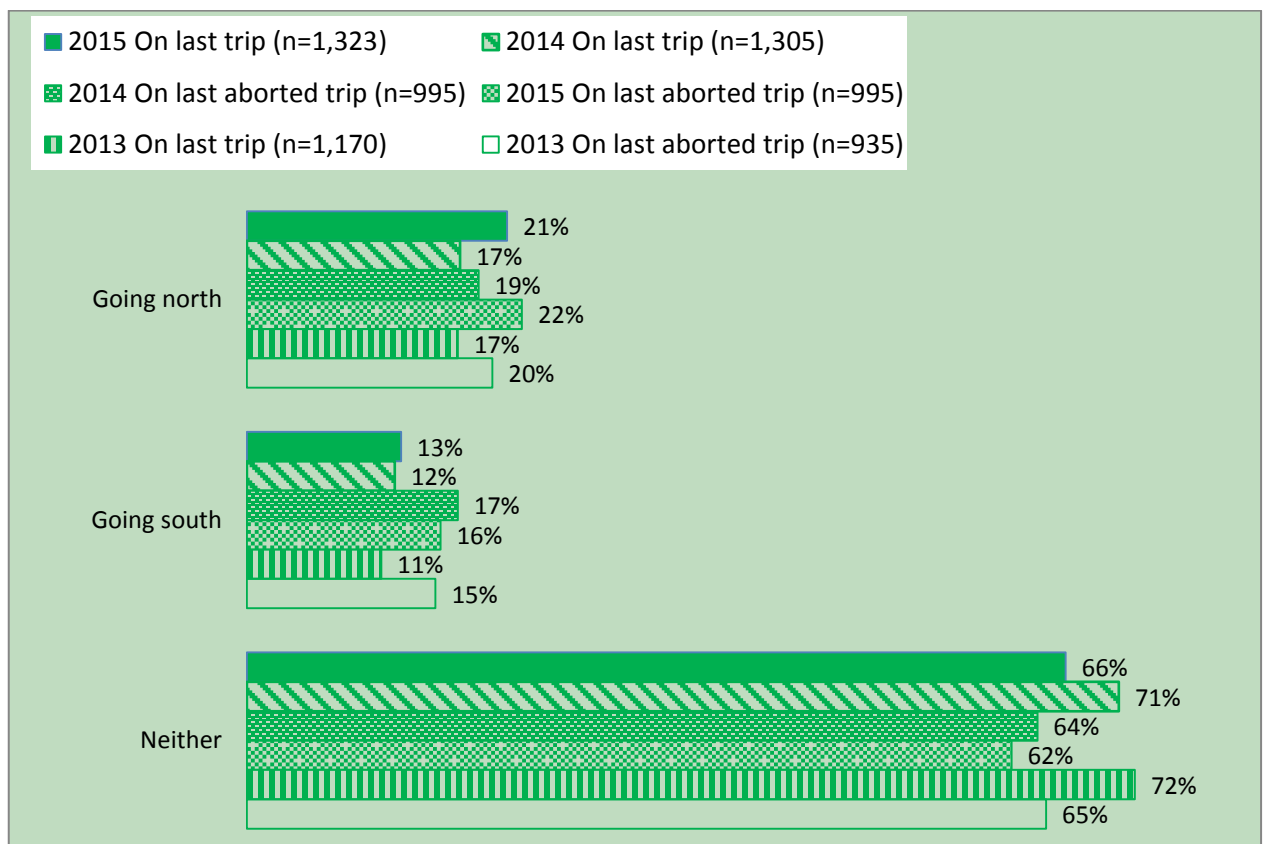
Sydney respondents in 2015, 2014 and in 2013 were asked whether they had (or would have) crossed Sydney Harbour going north or going south using the Sydney Harbour Bridge (SHB) or Sydney Harbour Tunnel (SHT) on:

- ✧ the last journey they took by taxi (Q15b)
- ✧ the last journey where they intended to take a taxi but in the end did not do so (Q34a)

Figure 41 shows the replies. Note that most of those who were asked Q34a had also taken a taxi in the previous six months, so the similarity of the replies is to be expected.

For both, most trips did not (or would not have) used the SHB or SHT. For both, trips are somewhat more likely to be going north than south by 2 to 8 percentage points.

Figure 41. Using the SHB or SHT on last and last intended taxi journey, Urban Sydney by year



Q15b Did you cross/ Q34a Would you have crossed the Harbour using the Sydney Harbour Bridge or Sydney... Base: Q15b All who have taken a taxi in the last six months
Base: Q34a: All who had considered taking a taxi and in the end did not

For each type of taxi journey actually taken and each type of aborted taxi journey, Figure 42 shows the distance for the 2014 Urban Sydney sample.

Trips that use the SHB or SHT in either direction and are or would be taken by taxi are significantly longer than those that do not cross the Harbour. It is probably difficult to make a journey crossing the Harbour that is less than 5 kms. There is little difference in the distance covered for trips that did cross or would have crossed going north and trips that cross going south.

Figure 42. Trip distance for last taxi journey by use of SHB/SHT 2015



Q15b Did you cross the Harbour using the Sydney Harbour Bridge or Sydney Harbour Tunnel

Q34a would you have crossed the Harbour using the Sydney Harbour Bridge or Sydney Harbour Tunnel ...

Base: Q15b All who have taken a taxi in the last six months and were asked Q15b

Base: Q34a: All who had considered taking a taxi and in the end did not and were asked Q34a

For both the last taxi journey taken and the last time respondents considered taking a taxi and in the end did not, where the journey would use the SHB/SHT going north it is more likely to start in the CBD than journeys using the SHB/SHT going

south or journeys that would not use the SHB or SHT (see Figure 43).

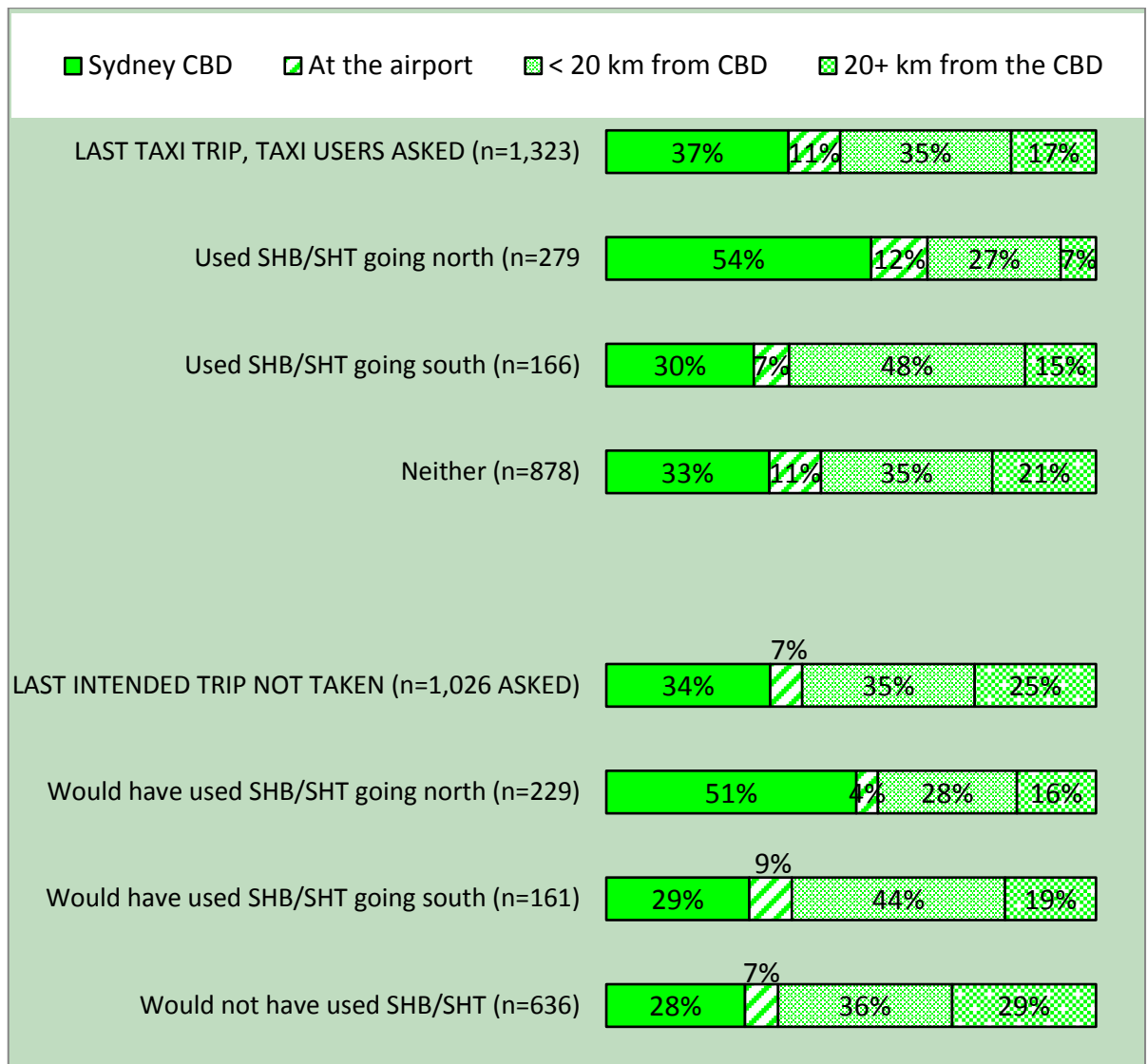
However, as was found in 2014, some of the replies suggest misunderstanding of the question about where the taxi was or would have been boarded. It would not be possible to board a taxi at the airport, travel south and use the SHB or SHT. Despite this, 7% of those saying their last taxi journey used the SHB or SHT going south said the journey started at the airport; 9% of those saying the last journey they did not in the end take by taxi that would have used the SHB or SHT going south would have started at the airport. Since this is not possible, either the origin or the direction of use of the SHB or SHT must be incorrect for these respondents. This could distort the distribution of other replies for those who reported the journey would use the SHB or SHT going south so the results shown in Figure 43 must be treated with some caution. However, in 2015 (as in 2014) the number of such infeasible replies is not large – 12 for journeys actually taken and 14 for journeys not taken

The percentage of journeys that used or would have used the SHB or SHT that start in or less than 20kms from the CBD varied with whether these Harbour crossings were used:

- ✧ 81% under 20 kms of n=279 for actual trips north
- ✧ 80% of n=229 for northwards trips not taken
- ✧ 78% of n=166 southward trips taken
- ✧ 73% of n=161 southward trips not taken
- ✧ 68% of n=878 other trips taken
- ✧ 64% of n=636 other trips not taken

Trips that use or would have used the Harbour crossings are more likely to start in the CBD or less than 20 kms from the CBD. Those using the crossing going north are more likely to start in the CBD (54%), than those going south (30%, presumably in the North Sydney CBD) and those not using these crossings (33%). These results are consistent with most replies to the question about use of the Harbour crossings being accurate.

Figure 43. Origin by use of SHB/SHT Urban Sydney 2015



Q15b Did you cross the Harbour using the Sydney Harbour Bridge or Sydney...

Q34a Would you have crossed the Harbour using the SHB or SHT ...

Base: Q15b Took a taxi in the last six months / Q34a: Considered taking a taxi and in the end did not

Figure 44 shows the destination of the last trip taken by taxi broken down by whether the journey reportedly went north through the SHB or SHT, went south through the SHT or SHB, or did not use the SHB or SHT.

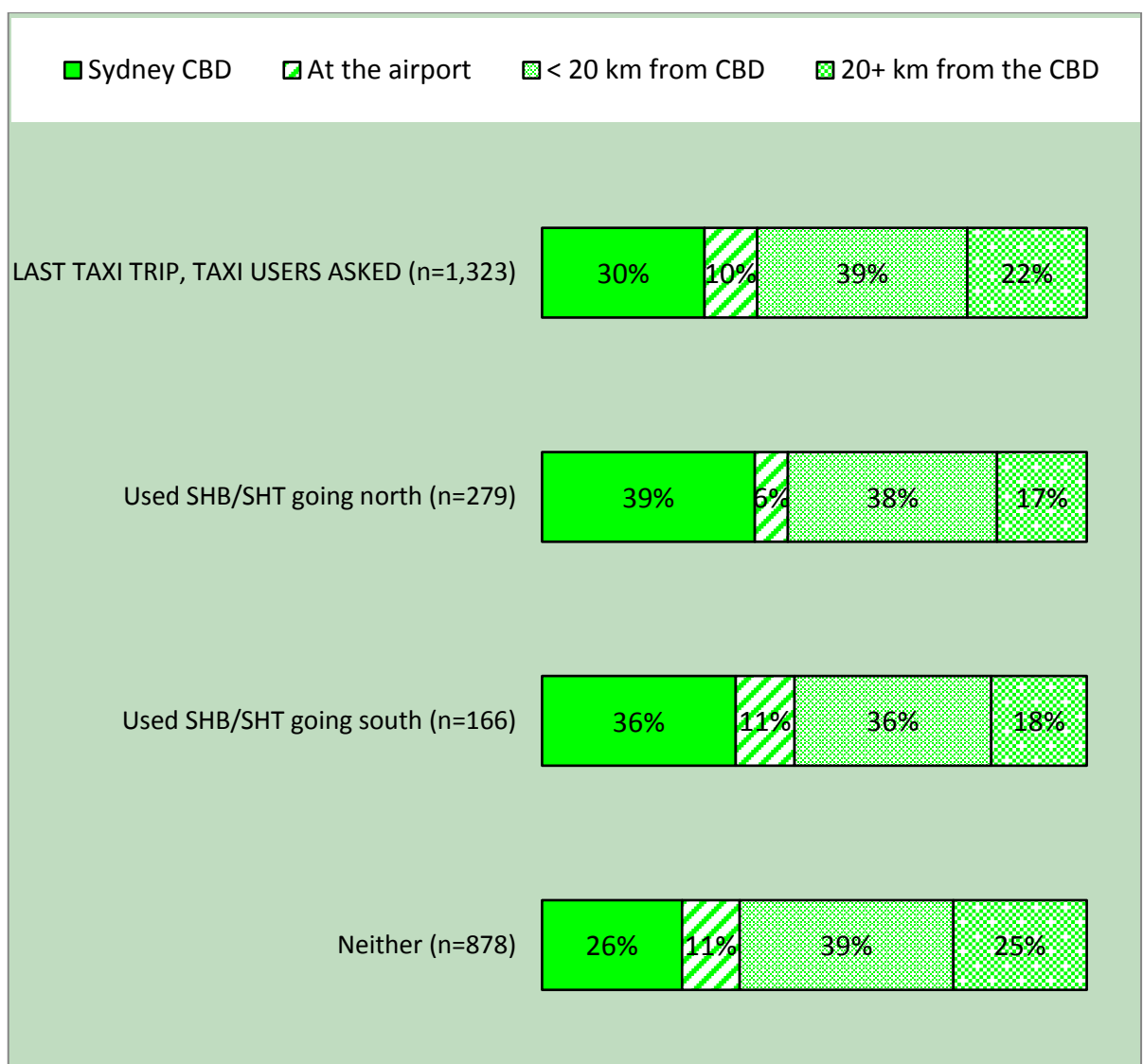
It appears odd that:

- ✧ n=17 taxi users reported travelling north through the SHB or SHT to the airport as these Harbour crossings are north of the airport
- ✧ n=59 respondents reported travelling south across the Harbour with a journey starting in the Sydney CBD

Those saying they travelled south from the CBD might have started their journey in the North Sydney CBD and considered this part of the Sydney CBD. The 17 saying they travelled south from the airport through one of the Harbour crossings must have given either the wrong origin or the wrong direction of travel.

Those using the Harbour crossings are somewhat more likely to be going to the CBD (39% and 36% compared to 26% of those not using the crossings).

Figure 44. Destination by use of SHB/SHT Urban Sydney 2015



Q15 (on last trip taken) Alighted ...

Q15b Did you cross the Harbour using the Sydney Harbour Bridge or Sydney...

Base: Q15b Took a taxi in the last six months

6. Willingness to pay and value for money

6.1. 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 45.

In summary, for Urban Sydney across the four years:

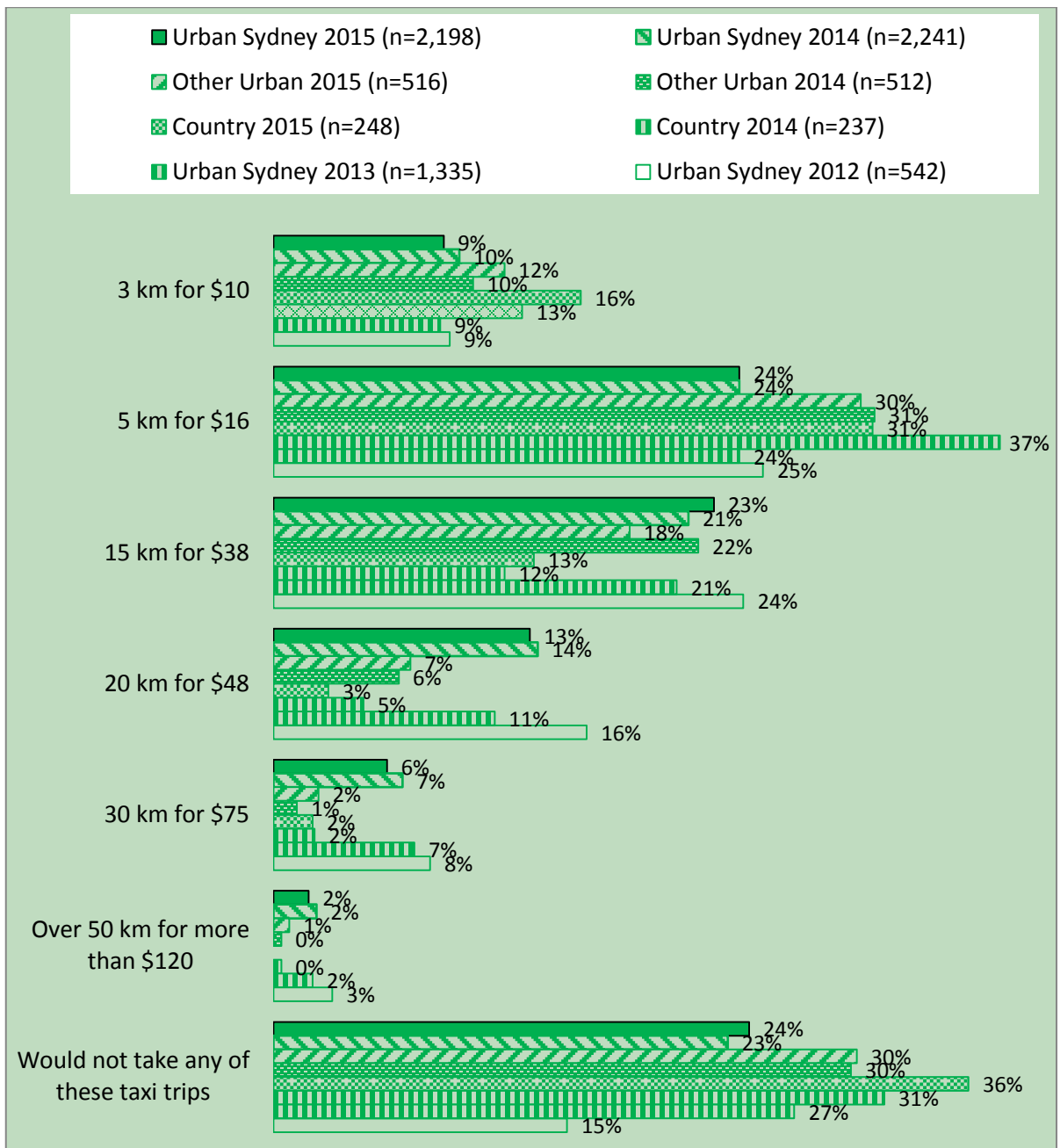
- ✧ 24% would not take any of the combinations offered in 2015 (23% in 2014, 27% in 2013, all similar and up from 15% in 2012)
- ✧ 9% would take only the shortest, cheapest trip (close to the results for each previous survey)
- ✧ Very few would be willing to take a trip of 50 km or more if this cost more than \$120, and only 8% would take a trip of 30 km or more for \$75 or more (very similar to the previous results)
- ✧ 21% would be willing to take a trip of 20km or more for \$48 or more (little changed from 22% in 2014, 20% in 2013 and somewhat lower than the 27% found in 2012)
- ✧ 43% would be willing to at least go 15 km for \$38 (43% in 2014, 44% in 2013 and 51% in 2012) while 57% (57% in 2014, 56% in 2013 and 48% in 2012) would not be willing to take a trip that long at these prices

Thus the 2015, 2014 and 2013 Sydney samples 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.

In 2015 and 2014, those outside Sydney are more price sensitive than those in Urban Sydney. Specifically, those in Other Urban and Country locations are more likely than those in Urban Sydney to say they would not take any of the trips at the prices offered, and are significantly less willing to take trips of 20 kms or more. Those in the Country locations are significantly less willing to take trips of 15 kms or more at the stated prices.

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

Figure 45. Longest trip respondent willing to pay for



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

6.2. 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 allowing respondents to say they did not know because they did not take that type of taxi trip was also offered.

Figure 46 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 2015 the highest percentage endorsing good value for money is for “short trips” (31%) with all other scenarios seen as good value by only 19% to 23% of taxi users. Only 20% considered taxis in general offer good value for money.

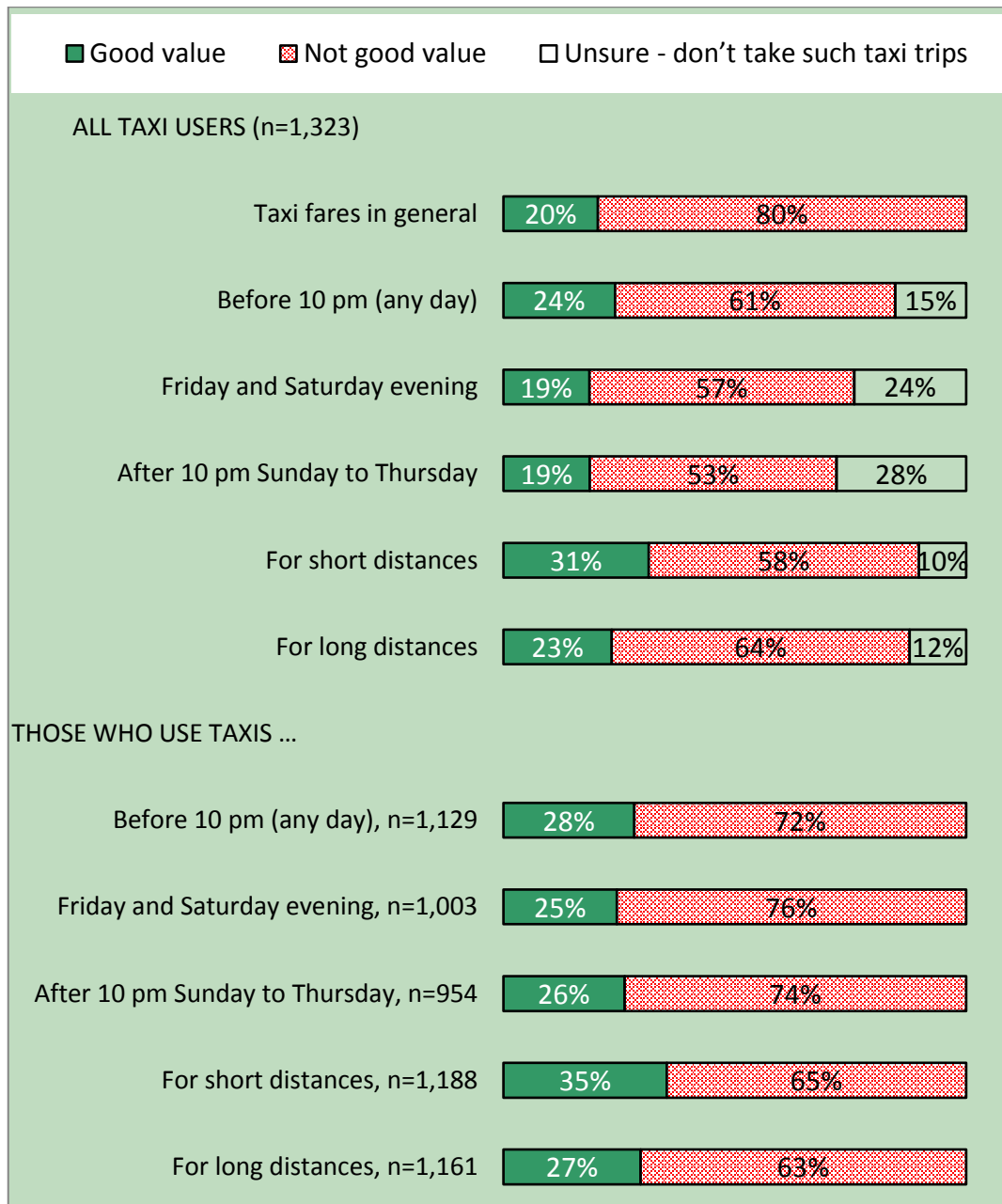
These results are very close to the results obtained in 2014 and 2013.

Among those who have taken a taxi in the circumstances described in a scenario, between 25% and 28% 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 35% of those who had taken such trips. Long trips are seen as good value by only 27% of those who had taken such trips (but up from 17% in 2014).

In 2015 Other Urban and Country residents are a little less likely to consider long trips good value for money than are those living in Urban Sydney (22% and 15% of those who had experience with short taxi trips compared to 27% in Urban Sydney). They are slightly more likely than Urban Sydney residents to consider taxi fares offer good value for money (24% of Other Urban and 39% of Country compared to 20% of Urban Sydney taxi users) and for specific times. Country users are particularly likely to consider trips before 10pm (41% of n=73 Country users compared to 29% of n=202 Other Urban users), and trips on a Friday or Saturday evening (26% of n=57 Country users compared to 20% of n=164 Other Urban users) to be good value. However, for all three locations, 41% or less of

users with experience of a scenario consider taxi fares good value for that scenario.

Figure 46. Trips seen as offering value for money Urban Sydney 2015



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

7. Reasons for not using a taxi

Those who had not considered using a taxi in the previous six months were asked their reasons for not doing so. Figure 47 summarises the answers obtained.

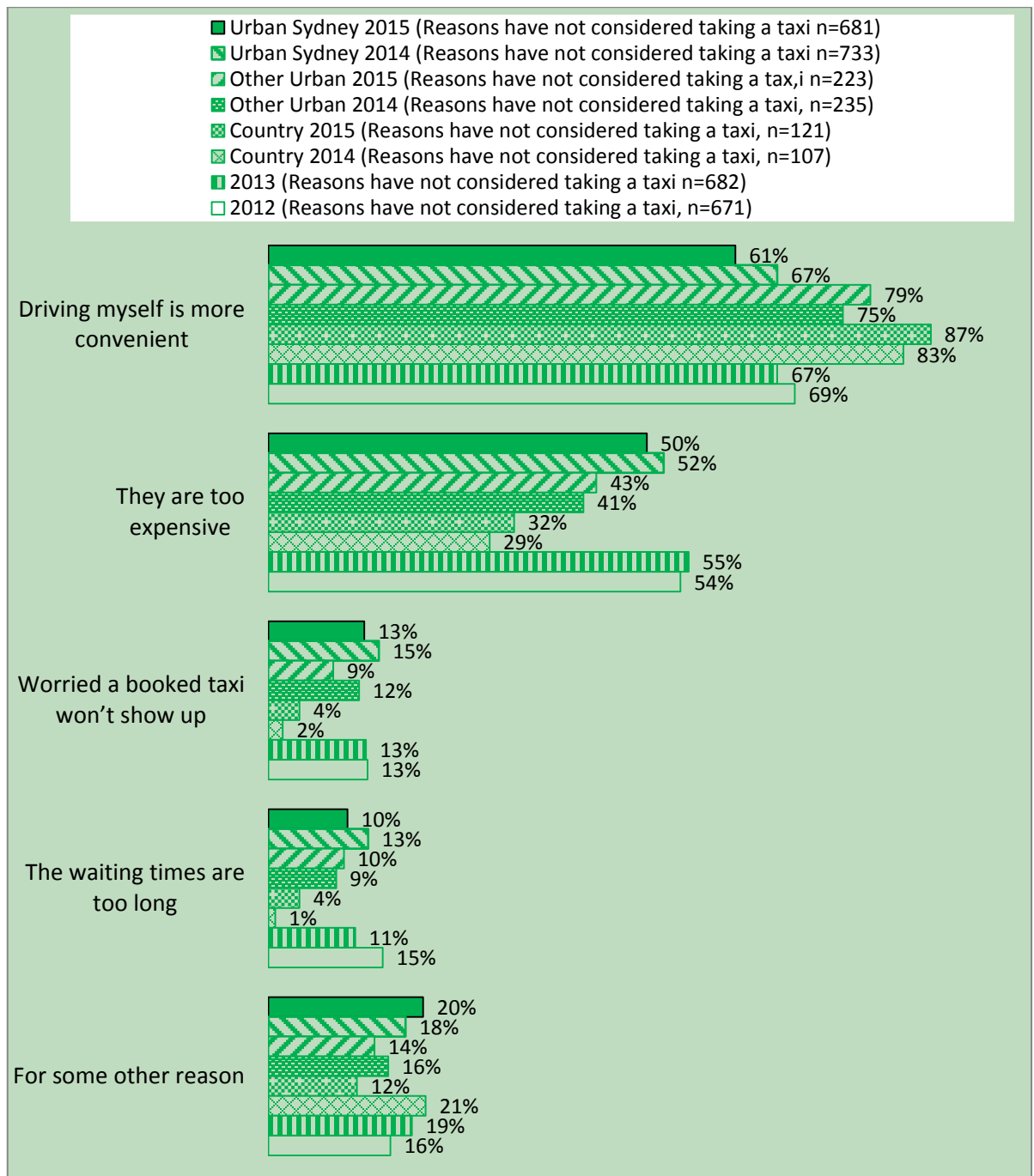
Convenience and cost dominate the reasons given in all 2015 locations and in the three previous years.

The two aspects of service that are most often endorsed (waiting time and failure to arrive when booked) could be seen as aspects of convenience.

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

In 2015, those in Other Urban locations and those in Country locations are both much more likely to report convenience and less likely to report expense as reasons for not taking a taxi: 79% compared to 43% for Other Urban and 83% compared to 29% for Country.

Figure 47. Reasons for not using taxis in the past six months



Q2013 Q41/2012 Q24 I have not considered taking a taxi because

PROMPTED REASONS:

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
5. For some other reason

8. Alternative services

8.1. Frequency of use

Respondents were all asked whether they had in the past six months used:

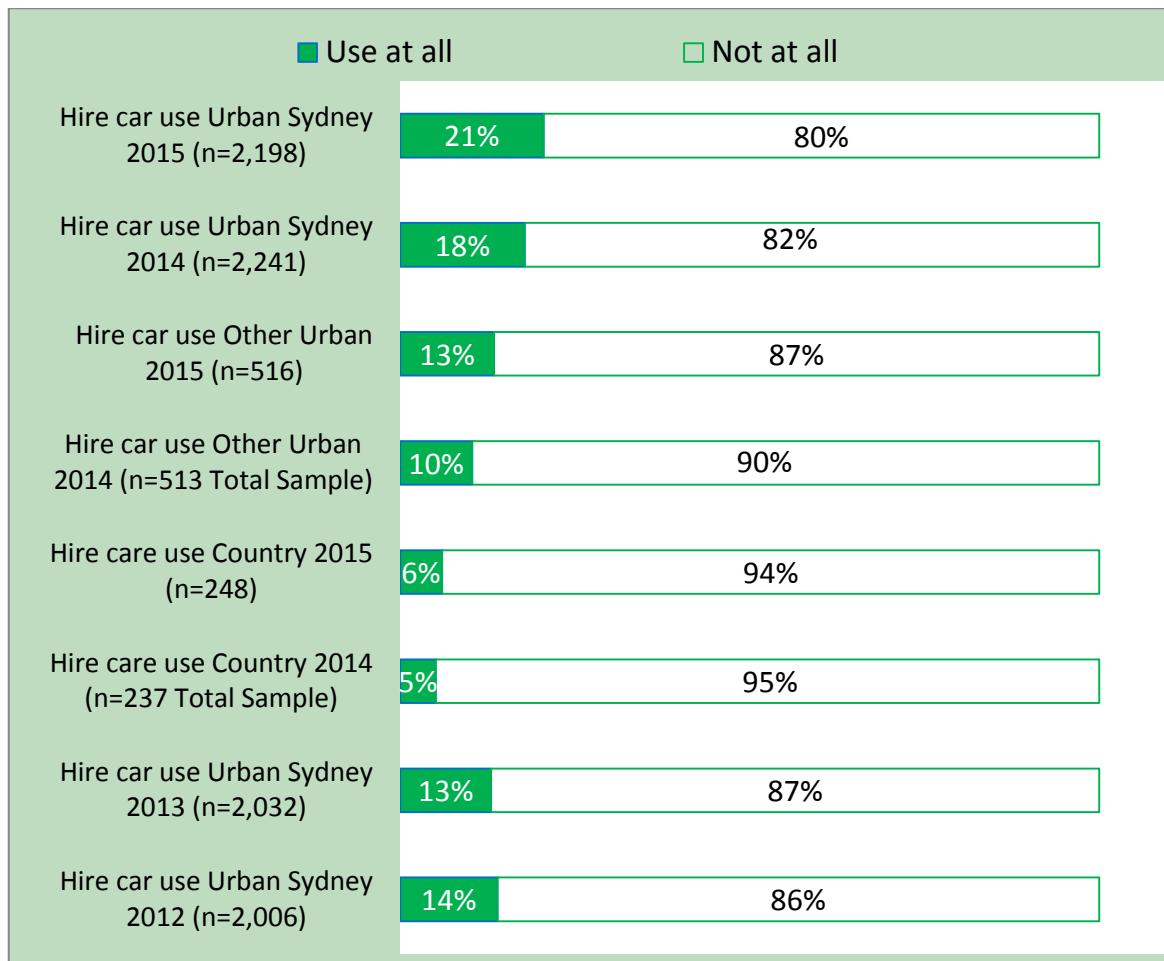
- ✧ a hire car with a driver
- ✧ A car sharing services (such as GoGet)
- ✧ A commercial ride sharing service (such as UberX)
- ✧ Community transport
- ✧ Courtesy transport

Figure 48 shows a slightly higher incidence of hire car use in Sydney in 2015 (21%) than 2014 (18%) which is in turn slightly higher than in the two previous years (13% and 14%). This trend to increasing use is statistically significant, (but even quite small differences reach significance when the samples are so large.)

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

As in 2014, use was lower in Other Urban (13%) and Country (6%) locations in 2015 than in Urban Sydney (21%). Country use in 2015 remains very low (6% in 2015 compared to 5% in 2014).

Figure 48. Incidence of using hire car in last six months



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 49. Results for Country locations in 2015 and 2014 are not shown as there are fewer than n=20 Country users in both years.

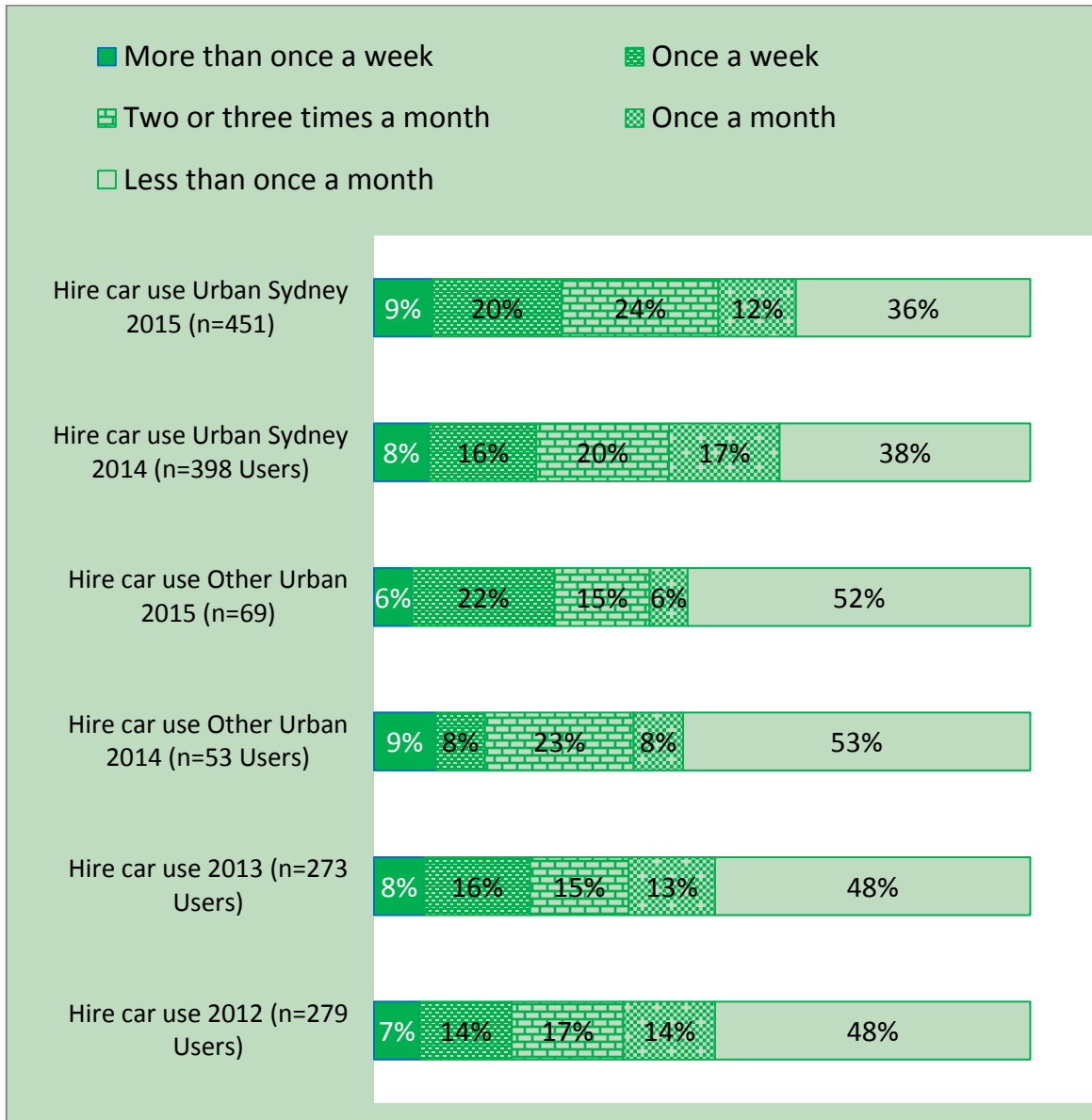
In Urban Sydney, about one in three users do so less than once a month.

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.

Frequency of use in Urban Sydney increased markedly in 2014 and has been sustained in 2015.

Frequency of use remains lower in Other Urban locations, and very few use hire cars in the Country towns surveyed.

Figure 49. Frequency of using hire car in last six months (2014 users only)



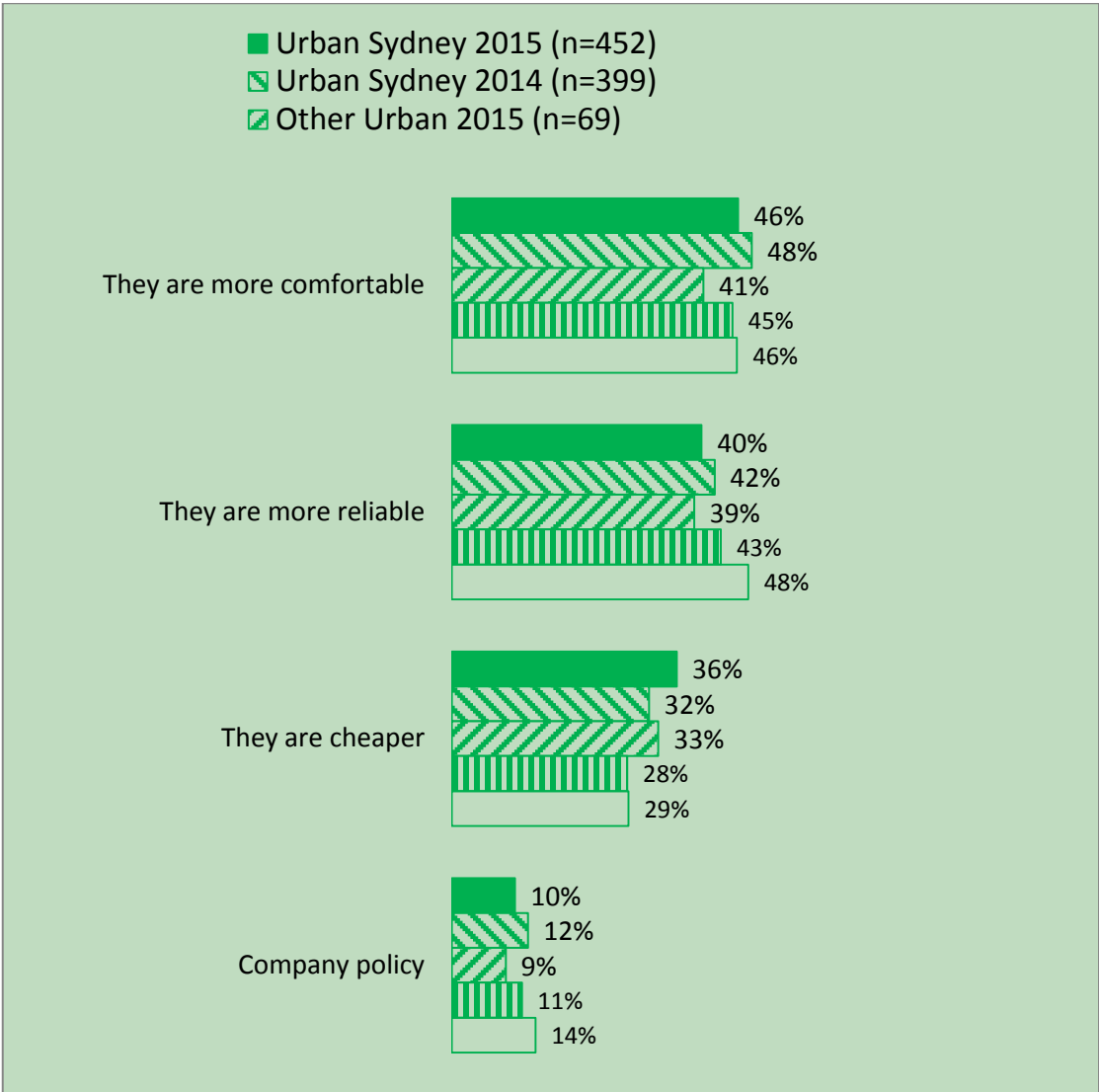
Q42. In the last six months I have used a hire car with a driver ... (Base: Users)

Reasons for use of hire cars

Figure 50 shows the reasons reported for using a hire car in Urban Sydney in 2015, 2014 and 2013, and for Other Urban in 2015 and 2014. Results for Country locations are not shown because the sample base for 2015 who use a hire car is n=15.

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.

Figure 50. Reasons for using a hire car



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

8.2. Use of other individualized transport services

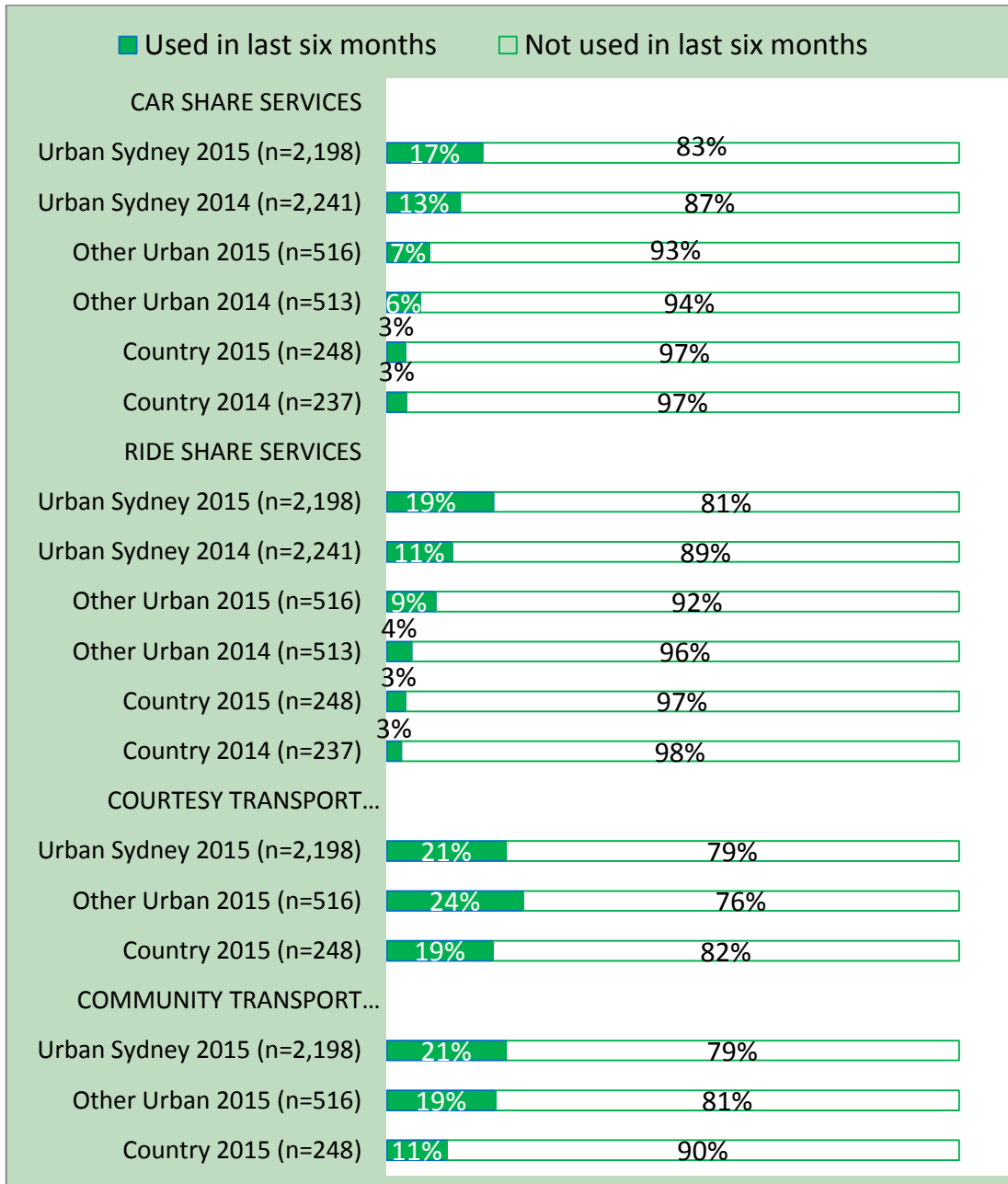
In 2014 questions were added to assess the use of car share services and of ride share services. In 2015 further questions were added to assess the frequency of use of courtesy transport and community transport.

Figure 51 shows the incidence of use of these car share and ride share services in 2015 and 2014.

In 2015, use remains low outside the Urban Sydney region and only 17% to 19% use each type of service in the last six months in Urban Sydney. However, the levels of use are increasing in both Urban Sydney and Other Urban locations and Urban Sydney use matches the reported use of hire cars in 2015.

Use of courtesy transport and community transport in 2015 is reported by 19% to 24% of the samples in all locations (except community transport in Country locations, 11%). These generally free forms of transport have a similar or higher penetration than hire cars, car sharing and ride sharing services (for which users pay).

Figure 51. Use of other individualised transport services in last six months by location 2015 and 2014



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) ...

Figure 52 shows the frequency of use for users in Urban Sydney, Other Urban and Country locations in 2015 for car sharing, ride sharing, Courtesy Transport and Community Transport services. There are less than 10 users of car sharing and ride sharing

services in the Country locations, so the data for these users is not shown.

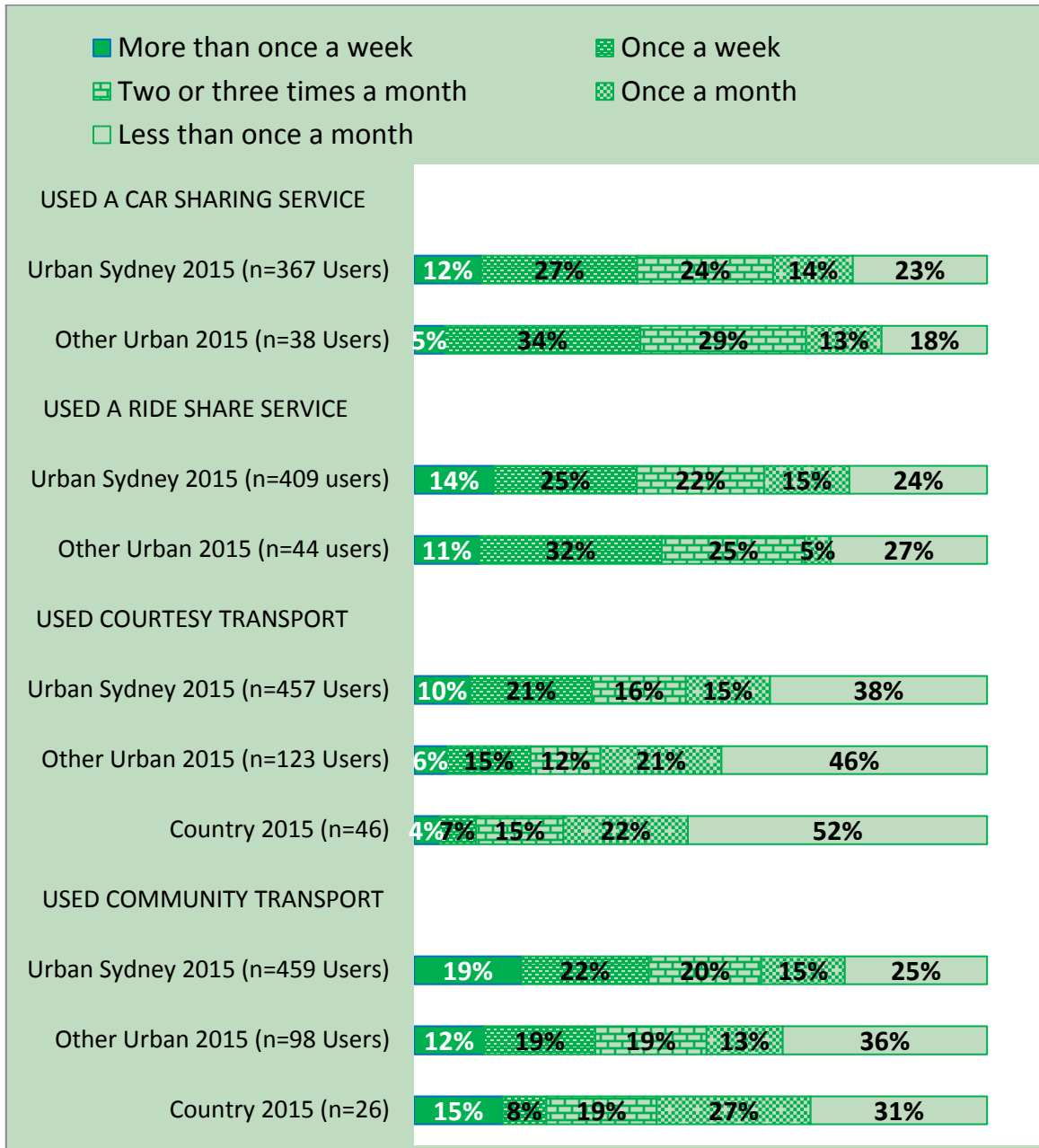
Users of Car Sharing and of Ride Sharing make more frequent use of these services than do users of hire cars. Around four in ten Car Sharing and Ride Sharing users do so at least once a week, compared to around three in ten users of hire cars.

Car Sharing and Ride Sharing service users in Urban Sydney use these services about as often as the small groups using each in Other Urban locations.

In Urban Sydney, Car Sharing and Ride Sharing users do so more often than Courtesy and Community Transport users. Users of Courtesy Transport and Community Transport in Urban Sydney do so more often than users in Other Urban locations, who use more often than Country users of the services.

Use of Courtesy Transport and Community Transport was not measured before 2015. The results for Ride Sharing and Car Sharing services in 2015 are similar to those found in 2014.

Figure 52. Frequency of using other individualised transport services in last six months (users only)



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) ...

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

Figure 53 shows the levels of endorsement of reasons for use of Car Sharing, Ride Sharing, Courtesy Transport and Community Transport services for 2015. Results are broken down by Urban Sydney, Other Urban and where there are more than 20 users, Country users.

Verbatim replies by those who indicated they had other reasons are coded and slightly boost the numbers for some of the pre-coded replies.

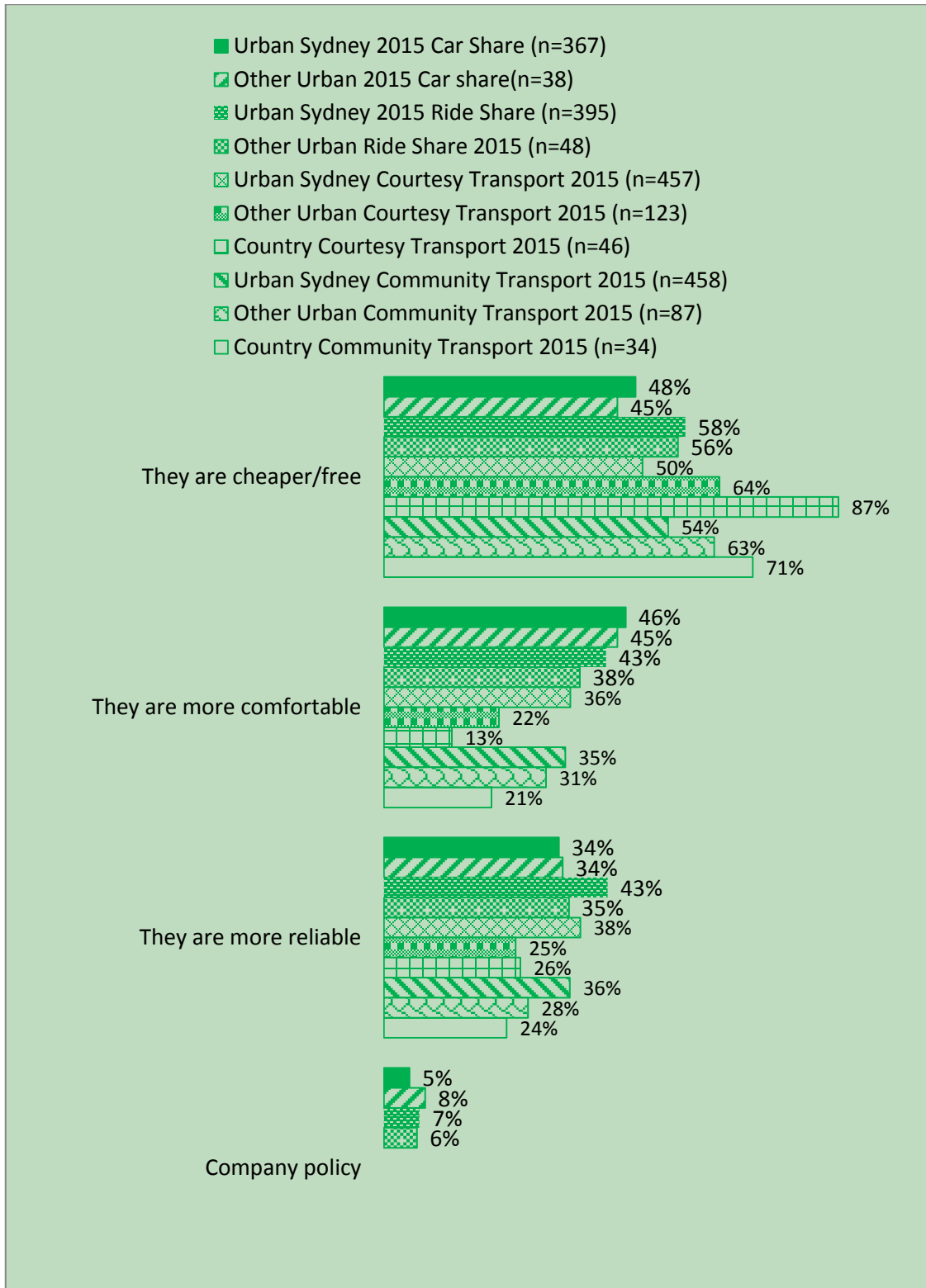
While there is considerable variation by location and type of service, the consistent leading reason for use is being cheaper (prompted) or (from other verbatim replies) free. This is in marked contrast to the reasons for using hire cars.

Comfort is generally the reason endorsed next most widely followed by reliability, especially for Car Sharing and Ride Sharing services. Users of Courtesy Transport and Community Transport in the Country locations overwhelmingly report being cheaper or free as their reason for use, followed by reliability. Few give comfort as a reason for use.

Relatively few refer to company policy, and then only for Car Sharing or Ride Sharing services.

The only unprompted reason given by 4% or more for any service and location is being more convenient and/or quicker, with 4% to 7% of users volunteering this reply for Community Transport and Courtesy Transport services. In Other Urban locations 3% mention drinking alcohol or being drunk as a reason for using Courtesy Transport.

Figure 53. Reasons for using a car share or ride share service



Q48 I used the car sharing service instead of a taxi because ...

Q50 I used the ride sharing service instead of a taxi because ...

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.

9. APPENDIX 1: The questionnaire

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

***INTRO SCREEN

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.

Instructions

For each question you will be required to click one or more boxes or type in your answer in the box provided.

Please do not use the browser's **FORWARD** and **BACK** buttons at any stage, instead use the **NEXT** button within the survey to move through.

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>. (Our apologies if this link is a bit slow to load).

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.

***SCREEN 1 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.

***KEEP Q1DEM, Q2DEM AND Q3DEM TOGETHER ON ONE SCREEN.

Q1DEM GENDER

I am:

1. Male
2. Female

Q2DEM AGE GROUP

I am aged ...

01. Under 16 – THANK & TERMINATE
02. 16 to 19
03. 20 to 24
04. 25 to 29
05. 30 to 39
06. 40 to 49
07. 50 to 59
08. 60 to 69
09. 70 to 79
10. 80 and over

Q3DEM LOCATION

What is the postcode where you live?

****ALLOW FOR FOUR DIGIT NUMERIC

PROGRAMMER: CONSTRUCT A QUESTION FROM THE REPLY ABOVE AS FOLLOWS:

Q3M SYDNEY

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. Out of area (ANY OTHER POSTCODE)

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 BECOMES CODE 0

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 2250 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

IF 14 IN Q3M THANK & TERMINATE AS OUT OF AREA.

Q3QUO QUOTAS

1. Sydney (IF 1 IN Q3M)

2. OTHER METRO (IF 2 OR 3 OR 4 IN Q3M)

3. RURAL (IF 5 TO 13 IN Q3M)

**** QUOTA TARGETS FOR WAVE 1:

** SYDNEY 2,200

** OTHER METRO 500

** RURAL 225

Q4DEM OCCUPATION STATUS

I am ...

(PLEASE CLICK ON ALL THAT APPLY)

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

**TO DISPLAY Q3PRE ONLY FOR THOSE LIVING IN SYDNEY:
IF Q3M NOT 1 SKIP TO Q1

Q3PRE

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

****ALL PARTICIPANTS

****NOTE: Suggested change to Q1 rejected.

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

Q2. USAGE CHANGE

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

If 2 in Q2 go to Q2B

If 3 in Q2 go to Q2DUMMY

Q2A. CAUGHT TAXIS MORE

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

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

GO TO QUESTION Q2DUMMY

Q2B. CAUGHT TAXIS LESS

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

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
12. I use ride share (such as UberX) instead
11. I have better access to other transport alternatives
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

Q2DUMMY

IF 3-9 IN DEM4 GO TO Q3

Employees only

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

IF 2 IN Q2C GO TO Q3

Q2D TAXI ACCESS FOR WORK

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

All participants

Q3. FUTURE TAXI USE

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

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

Q3DUMMY

If 1-6 in Q1, go to Q4

If 7 in Q1, go to Q30

***FOR USERS

Q4. VALUE FOR MONEY

RANDOMISE DISPLAY IN ORDER 1-3 AND 2-1,3

Overall, I think:

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

Q5. VALUE FOR MONEY BEFORE 10 PM

RANDOMISE DISPLAY IN ORDER 1-3 AND 2-1,3

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

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

RANDOMISE DISPLAY IN ORDER 1-3 AND 2-1,3

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

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

RANDOMISE DISPLAY IN ORDER 1-3 AND 2-1,3

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

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 DISPLAY IN ORDER 1-3 AND 2-1,3

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 DISPLAY IN ORDER 1-3 AND 2-1,3

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

RANDOMISE DISPLAY IN ORDER 1-3 AND 2-1,3

During the day, I think that:

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

RANDOMISE DISPLAY IN ORDER 1-3 AND 2-1,3

On Friday and Saturday nights, I think that:

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 NIGHTS

RANDOMISE DISPLAY IN ORDER 1-3 AND 2-1,3

On Sunday to Thursday nights, I think that:

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

***RETROSPECTIVE (MOST RECENT TAXI TRIP)

Q13. ABLE TO CATCH A TAXI FOR LAST JOURNEY

When I last tried to catch a taxi I was

1. Able to get a taxi
2. Not able to get a taxi because one didn't turn up after I had booked it
3. Not able to get a taxi because one didn't come to my rank
4. Not able to get a taxi because one didn't drive past when I was trying to hail one

The next questions are about your **most recent trip where you were able to catch a taxi**

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 4-13 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 [Q3M]
6. Less than 20 km from the centre of [Q3M]
7. More than 20 km from the centre of [Q3M]

If 4 in Q14 go to question 15

Q14A. BOARD - home

This was....

1. From my house
2. From somewhere else

Q15. ALIGHTED - location

In my most recent taxi trip in [Q3M], I got out of the taxi ...

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

IF 4-13 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 [Q3M]
6. Less than 20 km from the centre of [Q3M]
7. More than 20 km from the centre of [Q3M]

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

IF WAVE 1 GO TO Q18

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)
5. Other (such as education related)

Q21. REASON FOR TAXI USE

The main reason I took a taxi for this journey instead of other transport options was ...

1. Taxi was 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. Taxi was cheaper
4. I didn't have access to any other transport options
5. Another reason

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 23b
IF 3 TO 6 IN Q22 GO TO Q24
If 7 in Q22, go to Q22a
IF 8 IN Q22 GO TO Q25

Q22a. APP ORGANISED

I used

1. mTAXI
2. Silver Service App
3. Legion Taxis App
8. UberTAXI
4. goCatch
5. ingogo
7. iCab
9. RSL Taxis App
10. StGeorgeElite
6. Another app

Go to Q24

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

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

24a. 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 NON ARRIVAL

Which did you do?

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 did not call again

Q25. 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

Q26. TAXI 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 TAXI 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

****ALL PARTICIPANTS

Q30. CONSIDERED TAKING A TAXI BUT DID NOT

IF 1-6 IN Q1 HIDE CODE 2

IF 7 IN Q1 HIDE CODE 3

In the last 6 months ...

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 AND 7 IN Q1 GO TO Q41

IF 2 IN Q30 AND 1-6 IN Q1 GO TO Q40

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.

Q33DUMMY

IF 1 in Q31 GO TO Q33a

IF 2 IN Q31 GO TO Q33B

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 ...
(PLEASE TICK THE ONE MAIN REASON BELOW)

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 34

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 ...

(YOU CAN TICK MORE THAN ONE REASON BELOW)

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

Q34. BOARD

The last time I tried to catch a taxi or thought about catching a taxi and in the end did not, I would have caught it from ...

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

IF 4-13 IN Q3M DISPLAY CODES 5-7 Alighted

1. 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 [Q3M]
6. Less than 20 km from the centre of [Q3M]
7. More than 20 km from the centre of [Q3M]

IF NOT 1 IN Q3M SKIP TO Q35

Q34A. USED SHB OR SHT

The last time I tried to catch a taxi or thought about catching a taxi and in the end did not, I would have crossed the Harbour using the Sydney Harbour Bridge or Sydney Harbour Tunnel ...

1. Going north
2. Going south
3. Neither of the above

Q35. DISTANCE

The last time I tried to catch a taxi or thought about catching a taxi but in the end did not, the journey would have been ...

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

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

***NO Q37.

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 USERS ONLY

IF 7 IN Q1 GO TO Q41DUMMY

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 Q42

Q40A. IDENTIFY TAXI PROBLEMS

Problems I have experienced in the last 12 months include: (can choose more than one)

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 was driving, or the taxi driver was breaking the road rules
7. The driver was rude, unhelpful, or offensive
8. Something else

IF NOT 8 IN Q40A, GO TO QUESTION Q42

Q40B:

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

TEXT BOX

GO TO QUESTION 42

***NON USERS ONLY

Q41 DUMMY

IF 1-6 IN Q1 GO TO Q42

IF 1 IN Q30 GO TO Q42

Q41. HAVEN'T CONSIDERED A TAXI

I have not considered taking a taxi because... (YOU CAN CHOOSE MORE THAN ONE REASON)

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
5. For some other reason

****ALL PARTICIPANTS

Q42. HIRE CARS

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

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

IF 6 IN Q42 GO TO Q44

Q43. REASONS USED A HIRE CAR

I used the hire car with a driver instead of a taxi because
(PLEASE CLICK ON ALL THE REASONS THAT APPLY)

1. They are more reliable
2. They are more comfortable
3. They are cheaper
4. Of company policy

Q44. NUMBER OF VEHICLES

The number of registered vehicles, counting both private and company owned, used by my household is ...

0. None
1. 1
2. 2
3. 3 or more

Q45. USUAL TRAVEL

I usually get around by ...

(PLEASE CLICK ON ALL THAT APPLY)

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

Q46. PROXIMITY TO PUBLIC TRANSPORT

To get to my nearest train, bus, or ferry stop I would usually ...

1. Walk, less than 10 minutes
2. Walk, at least 10 minutes but less than 20 minutes
3. Walk, 20 minutes or more
4. Drive or get a lift, less than 10 minutes
5. Drive or get a lift, 10 minutes or more
6. Never use public transport

Q47. CAR SHARING SERVICE

In the last six months I have used a car sharing service (for example, GoGet, GreenShareCar, Car Next Door or Hertz 24/7) ...

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

IF 6 IN Q47 SKIP TO Q49

Q48. REASONS USED CAR SHARING SERVICE

I used the car sharing service instead of a taxi because

(PLEASE CLICK ON ALL THE REASONS THAT APPLY)

1. They are more reliable
2. They are more comfortable
3. They are cheaper
4. Of company policy
5. Other reasons (SPECIFY)

Q49. . RIDE SHARING SERVICE

In the last six months I have used a ride sharing service (for example, UberX or RideSurfing)

...

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

IF 6 IN Q49 SKIP TO Q51

Q49A RIDE SHARE SERVICE USED

Which ride sharing service did you use?

1. UberX
2. Other (please specify)

Q50. REASONS USED RIDE SHARING SERVICE

I used the ride sharing service instead of a taxi because

(PLEASE CLICK ON ALL THE REASONS THAT APPLY)

1. They are more reliable
2. They are more comfortable
3. They are cheaper
4. Of company policy
5. Other reasons (SPECIFY)

Q51. COURTESY TRANSPORT

In the last six months I have used courtesy transport provided by a pub, club or other venue

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

IF 6 IN Q51 SKIP TO Q53

Q52. REASONS USED COURTESY TRANSPORT

I used courtesy transport instead of a taxi because

(PLEASE CLICK ON ALL THE REASONS THAT APPLY)

1. It is more reliable
2. It is more comfortable
3. It is cheaper
4. Other reasons (SPECIFY)

Q53 In the last six months I have used community transport (provided in a vehicle other than a taxi)

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

IF 6 IN Q53 SKIP TO Q5DEM

Q54. REASONS USED COMMUNITY TRANSPORT

I used community transport instead of a taxi because

(PLEASE CLICK ON ALL THE REASONS THAT APPLY)

1. It is more reliable
2. It is more comfortable
3. It is cheaper
4. Other reasons (SPECIFY)

***OTHER DEMOGRAPHICS - ALL RESPONDENTS

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.

01. Under \$20,000
02. \$20,000 to under \$30,000
03. \$30,000 to under \$40,000
04. \$40,000 to under \$50,000
05. \$50,000 to under \$60,000
06. \$60,000 to under \$80,000
07. \$80,000 to under \$100,000
08. \$100,000 to under \$120,000
09. \$120,000 to under \$180,000
10. \$180,000 or more
11. Can't say
12. Don't want to say

Q6DEM DISABILITY

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
2. Only use a wheelchair accessible taxi

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 from MyOpinions.

10. APPENDIX 2: Weighting the data

The weight (W_t) 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

SUB GROUP	Urban Sydney			Other Urban			Country		
	TARGET	ACTUAL	Wt= T/A	TARGET	ACTUAL	Wt= T/A	TARGET	ACTUAL	Wt= T/A
Males 16-29	283	255	1.1089	66	36	1.8333	31	4	2.3333
Males 30-39	215	231	0.9307	38	32	1.1875	18	17	
Males 40-49	188	188	1.0000	40	56	0.7143	19	16	1.1875
Males 50-59	165	164	1.0061	41	47	0.8723	19	21	0.9048
Males 60 plus	231	232	0.9957	70	71	0.9860	30	57	0.5263
TOTAL MALES	1,082	1,070		255	242		117	115	
Females 16-29	277	279	0.9928	57	63	0.9048	32	18	1.7778
Females 30-39	215	219	0.9817	40	47	0.8511	19	14	1.3571
Females 40-49	192	196	0.9796	43	45	0.9556	21	13	1.6154
Females 50-59	170	170	1.0000	41	40	1.0250	21	38	0.5526
Females 60 plus	263	265	0.9925	70	79	0.0127	38	50	0.7600
TOTAL FEMALES	1,117	1,129		261	274		131	133	
TOTAL SAMPLE	2,199	2,199		516	514		248	248	

"Target" reflects estimated population distribution.

NOTE: Cells have been combined where necessary to avoid very large weights that can result 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.

Table 3. Frequency of taxi use, weighted and unweighted by region

SUB GROUP	Urban Sydney		Other Urban		Country	
	Wtd %	Uwtd %	Wtd %	Uwtd %	Wtd %	Uwtd %
More than five times a week	3.2	3.1	1.5	1.4	2.4	2.0
Three to five times a week	4.7	4.7	2.7	1.7	3.6	1.6
One to two times a week	7.2	7.1	4.4	4.5	2.8	3.2
Two to three times a month	11.5	11.4	7.9	7.9	7.3	7.3
Once a month	8.7	8.7	7.0	6.8	6.9	5.2
Less than once a month	25.0	25.1	23.2	22.7	18.1	16.9
Not at all	39.7	39.8	53.2	55.0	58.9	63.7
Number of cases	2,199	2,199	516	516	248	248

The differences between the weighted and unweighted distributions are generally small. The largest difference in the percentage who have not taken a taxi in the past six months was in the Country sample, which is the smallest and has more substantial weights than the other samples. Where the weighted estimate of non-use was 59%, the unweighted estimate was 64%, a difference of 5 percentage points. However, this is within the 95% confidence interval for a random sample of this size.

This analysis confirms that there is insufficient bias in estimates due to the samples not matching the population age by gender distribution to justify the loss of precision that results from weighting the data.

