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TAVERNER
RESEARCH

Report on:

Survey of Taxi Use

Prepared for: IPART

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1. Executive summary

IPART commissioned Taverner Research to conduct an online survey of a representative sample of at least 2,200 Urban Sydney adults, a least 500 Other Urban adults (drawn from urban areas of Newcastle, Wollongong, Gosford and Wyong) and at least 225 country adults (drawn from a list of Country towns with 20 or more taxi licences) 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 2,992 completed surveys were obtained, 2,241 from Urban Sydney, 514 from the Other Urban locations and 237 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:

- 58% of Urban Sydney adults had used a taxi in the previous six months compared to 39% of Other Urban and 45% of Country adults
- 26% in Urban Sydney had done so less than once a month, compared to 19% of Other Urban and 22% of Country adults
- 13% did so at least once a week, and 7% more than twice a week in Urban Sydney compared to 7% and 3% in Other Urban and 7% and under 1% in the Country towns
- Thus taxi use is significantly more common in Urban Sydney than in other areas served by taxis, and the frequency of use is higher in Urban Sydney than in the other two locations.

Waiting times are higher on a Friday and Saturday nights, although difference is less marked than in the previous survey. The pattern of demand varied markedly by day of week and time of day. Overnight demand on Friday to Saturday was particularly heavy. Waiting times tended to be longer on Friday and Saturday evenings but not overnight on those days. Taxis were least likely to be booked, either as the next taxi available or for a specific time at these times on Friday and Saturday.

As had been found in the two previous surveys in 2013 and 2012:

- 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 for use of emerging car sharing and ride sharing services, although these are not yet widely used even in the Urban Sydney region

The report provides detailed results for key questionnaire items and examines the relationship of key items to others that have policy relevance.

2. Background & Introduction

IPART commissioined Taverner Research to conduct an online survey of a representative sample of at least 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.

In the November 2014 survey, additional samples were sought of a least 500 in Other Urban locations (urban Newcastle, Wollongong, Gosford and Wyong, based on the transport district boundaries for each) and at least 225 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 the 2012 benchmark survey.

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

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 (SNB) 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 or ride share service in the past six months and 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

The finalised questionnaire is attached as an appendix to this report. Respondents took around 14 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 10 day period to minimise any bias that might occur due to respondent readiness to respond immediately once an invitation was received. For surveys on transport use, the answers from people who are out of home more often are likely to differ from those of people who stay at home more, and those who stay at home more are likely to be among the first to respond to a survey invitation. Thus it is important to ensure that those who do not respond to an initial invitation are re-invited. This is similar to making call backs to establish contact and achieve interviews in telephone surveys.

A final sample of 2,992 usable replies was obtained, 2,241 in Urban Sydney, 514 in the Other Urban and 237 in the 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 30 and Urban Sydney adults (especially females) aged 70 or more were under-represented. Urban Sydney people aged 60 to 69 were over-represented. Patterns of over- and under-representation were less consistent in the Other Urban and Country samples as would be expected given the smaller sample sizes.

Checks on the effects of weighting the data to match the population distribution on age group within genders found that weighting made negligible differences to the results.

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.

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	70	33	17	7	7	3
Males 20 to 29	201	144	52	34	23	10
Males 30 to 39	199	214	38	31	18	17
Males 40 to 49	190	218	41	36	19	16
Males 50 to 59	168	216	39	60	20	23
Males 60 plus	239	305	68	104	31	35
TOTAL MALES	**1.067**	**1,130**	**255**	**272**	**118**	**104**
Females 16 to 19	64	62	16	8	3	3
Females 20 to 29	231	339	44	58	27	30
Females 30 to 39	234	194	39	40	16	19
Females 40 to 49	205	152	42	37	19	20
Females 50 to 59	172	171	41	45	19	28
Females 60 plus	268	193	79	54	36	33
TOTAL FEMALES	**1,174**	**1,111**	**261**	**242**	**120**	**133**
TOTAL SAMPLE	**2,241**	**2,241**	**516**	**514**	**238**	**237**

"Target" reflects estimated population distribution.

While there were differences between the expected frequencies based on the population distribution and the actual sample frequencies, after exploring the effect of weighting it was concluded that no weighting was required.

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 2014 survey for Urban Sydney are compared to the results of the 2013 and 2012 surveys.

Throughout, 2014 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 I 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.

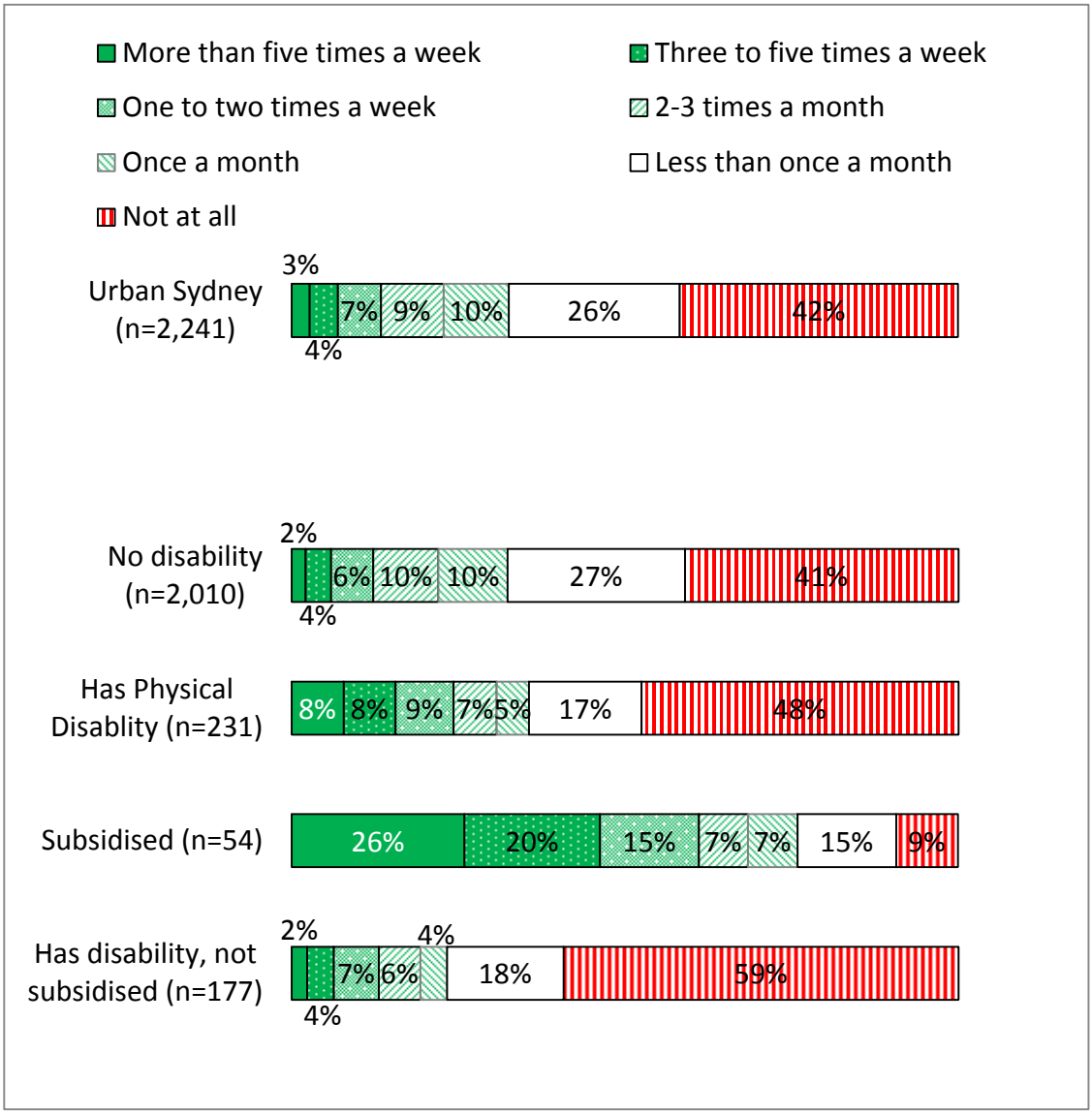
Task	Date
Project commissioning	1 October 2014
Questionnaire finalised, set up for online administration and tested	21 October 2014
Pilot survey (N=200 plus, Urban Sydney) carried out	22 to 24 October 2014
Main field work carried out	27 October to 1 November 2014
Draft report submitted	14 November 2014
Final report submitted	TBA

4. Results: Taxi use

4.1. Frequency of use

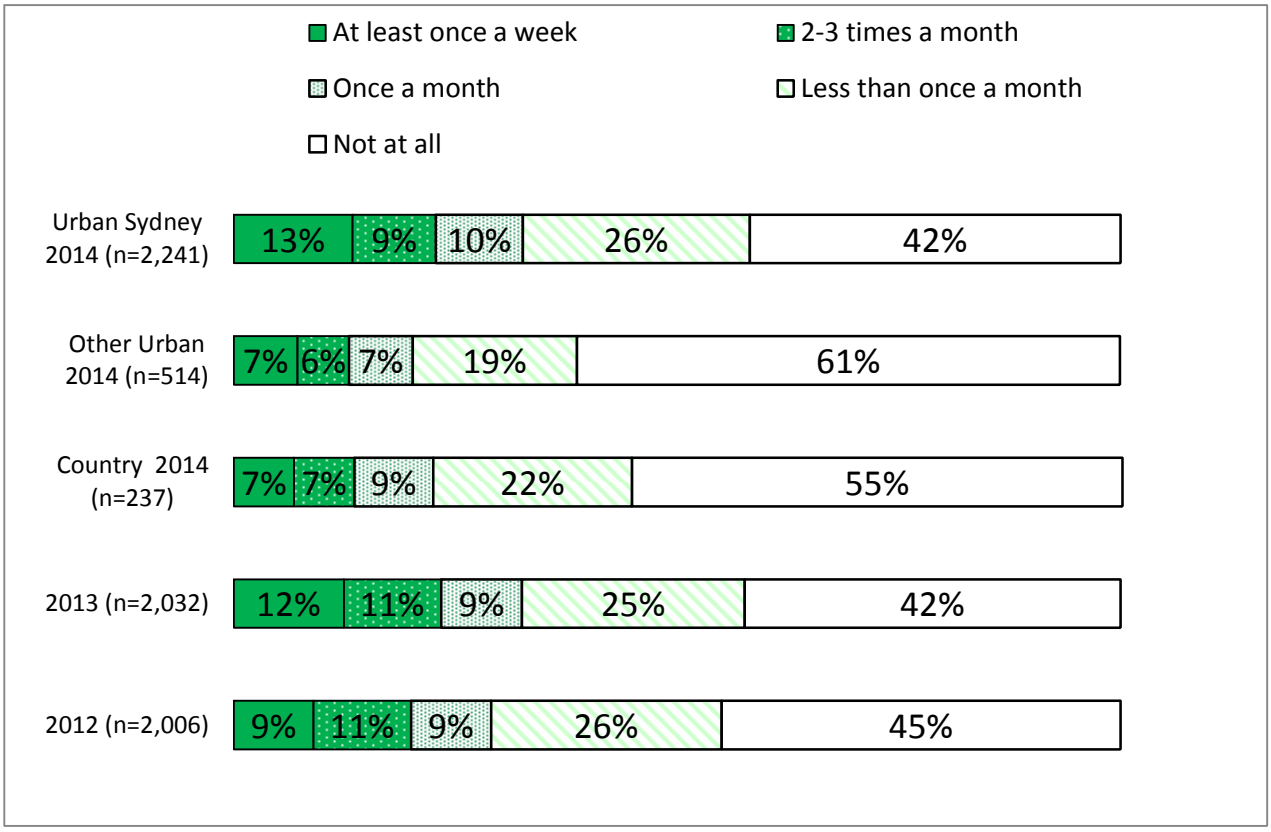
As shown in Figure 1 below, over half the Urban Sydney sample (58%) had used a taxi in the past six months, but 26% (almost half of the taxi users) had done so less than once a month. Only 14% had used a taxi at least once or twice a week and only 7% more than once or twice a week.

Figure 1. Frequency of taxi use in the past six months: 2014 Urban Sydney by disability and whether subsidised



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

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



Q1. In the last six months I caught a taxi in Sydney….
NOTE:
In 2013 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

Change in use since 2012

Differences in the distribution of taxi use frequency in the Urban Sydney region from 2012 to 2014 were small but statistically significant. Specifically:

- the percentage using a taxi at least once a week was significantly lower in 2012 than in 2014
- the percentage using a taxi at least 2 to 3 times a month was also significantly lower in 2012 (20%) than the 23% in both 2013 and 2014
- The difference between 2012 and the later years in the percentage who ever use a taxi was not statistically significant ($p \simeq 0.08$)

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

Variation in taxi use by region, 2014

Taxi use in 2014 was significantly more common in the Urban Sydney region (58%) than in either the Other Urban (39%) or country (45%) regions. The difference between Other Urban and Country was not significant.

Among users in each region, frequent use was slightly higher in Urban Sydney (38% of users doing so more than once a month) than in the Other Urban (33%) or Country (31%) regions. However this trend was not statistically significant.

Urban Sydney residents were more likely to use a taxi and might do so more often than Other Urban and Country residents.

Effects of disability and access to subsidy

In 2014, (see Figure 1) those in Urban Sydney with a disability (n=231) were significantly more likely than those without a disability to use a taxi five or more times a week (8% compared to 2%), but the difference in the proportion that had used a taxi (52% compared to 59%) was not statistically significant.

The base number of users with a disability receiving a subsidy was low (n=54). Of those receiving a subsidy, 26% used taxis at least five times a week and a total of 61% used a taxi at least once a week compared to 13% of the n=177 with a disability who do not receive a subsidy and 12% of those with no disability (n=2,010). 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 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.

Only 15 Urban Sydney respondents 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 5 reported use at least once a week, 4 reported that they had not used at all in the past six months and the others reported using less than once or twice a week.

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:

- 47% of n=1,463 in Urban Sydney who usually get about by car
- 73% of n=778 in Urban Sydney who do not usually get about by car

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

- 36% of n=417 in Other Urban locations who usually get about by car
- 51% of n=96 in Other Urban locations who do not usually get about by car
- 41% of n=119 in Other Urban locations who usually get about by car
- 67% of n=36 in Country locations who do not usually get about by car

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

- 66% of n=975 in Urban Sydney who usually rely on public transport
- 52% of n=1,266 in Urban Sydney who do not usually relyy on public transport

Other Urban respondents who usually rely on public transport and those who do not were almost equally likely to have used a taxi:

- 41% of n=104 in Other Urban locations who usually rely on public transport
- 38% of n=409 in Other Urban locations who do not usually rely on public transport

In Country locations, too few usually rely on public transport (n=17) to allow meaningful comparison.

Differences in taxi use between those who usually get a lift and others, or between those who usually cycle or walk and others were much smaller (3 to 5%) and not statistically significant.

The n=77 who reported they usually drive themselves using a GoGet or other car sharing service were very likely to have used a taxi (91% compared to 57% of other Urban Sydney respondents) and to do so frequently (61% 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 were slightly (but not significantly) more likely to report using a taxi at least once a week than Urban Sydney respondents who reported taking a taxi as their usual mode of travel (61% of n=77 compared to 49% of n=126). There was little overlap between the two groups (n=7 in Urban Sydney, 9% of those reliant on car sharing services and 6% of those reliant on taxis).

The n=287 Urban Sydney residents (13%) who had used a car sharing service in the past six months were more likely to have used a taxi (95%) than those who had not used any car sharing service (53%), and there was a clear association been making more frequent use of a car sharing service and making more frequent use of a taxi.

The n=255 Urban Sydney residents (11%) who had used a ride sharing service in the past six months were also much more likely (96%) to have used a taxi than were 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 were much more likely than other Urban Sydney residents to have used a ride sharing service (76% of n=287 compared to 2% of n=1,954 who had not used a car sharing service). There was 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.

Annual household income

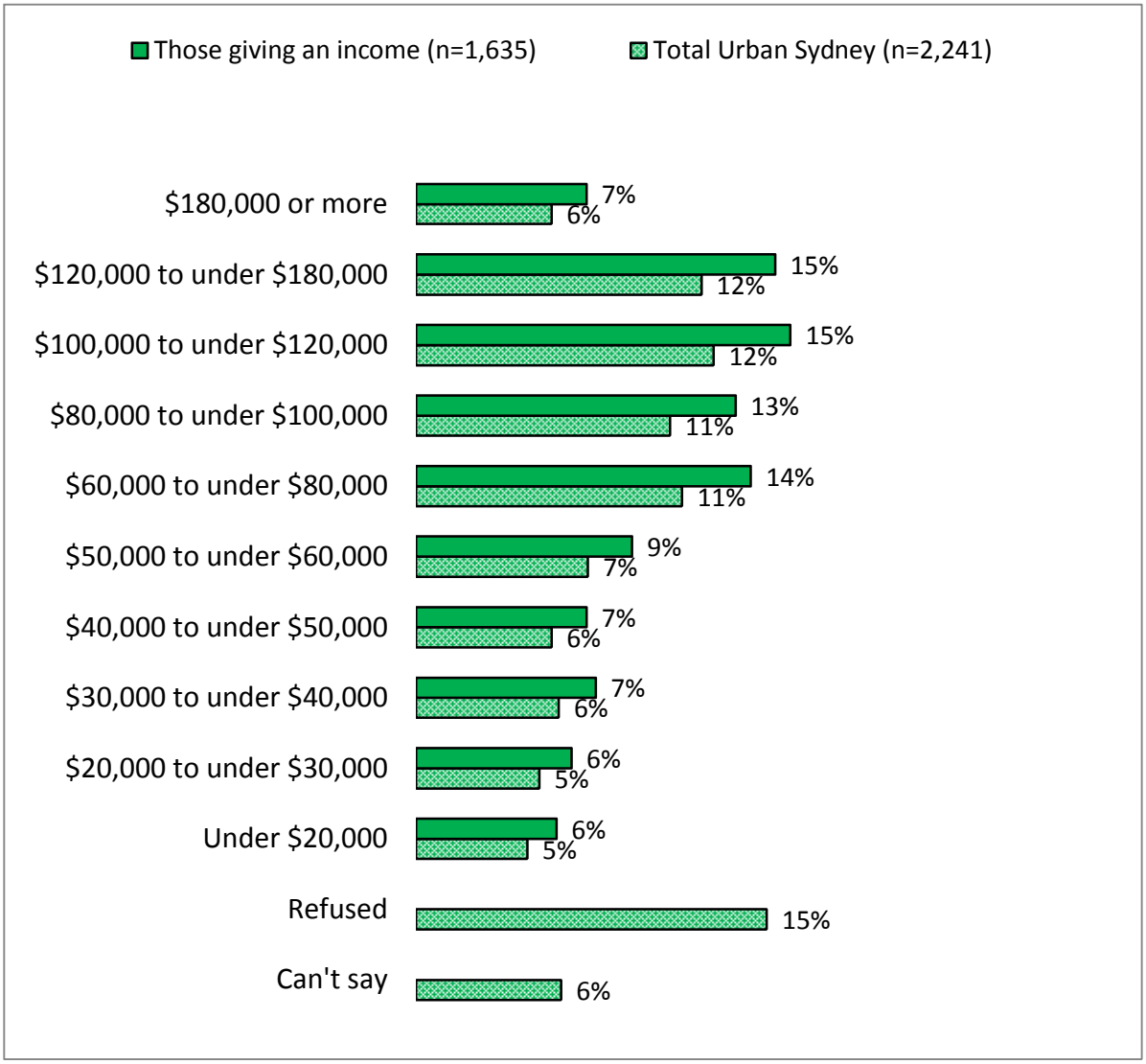
Reported household income also affected taxi use.

Figure 3 shows the income distribution of the sample. One fifth of the sample indicated that they either could not say what the household's annual gross income was (6%) or did not want to answer (15%) – quite a typical result and almost identical to the result obtained in 2013.

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

Seven percent of those giving an income indicated it was $180,000 or more, 22% that it was $120,000 or more, and 37% that it was $100,000. These proportions reporting high incomes are slightly higher than were obtained in 2013. Available population income distribution data are not directly comparable.

Figure 3. Reported household annual income of Urban Sydney residents, 2014



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 was 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=103 with incomes under $20,000 pa to
- 63% of n=125 with incomes of $180,000 pa or more

This difference was somewhat smaller than had been found in 2013. In particular the lowest income group appeared somewhat more likely to use a taxi in 2014 than in 2013.

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

- 12% in the three lowest household income bands (all under $40,000 pa, n=351)
- 19% in the next two bands ($40,000 to under $60,000 pa)
- 13% in the next three bands ($60,000 to under $120,000)
- 15% for those reporting $120,000 to under $180,000
- 21% for those reporting $180,000 or more

Taxi use among those who could not report their household income (53% of n=125) and for those who declined to report their household income (50%) was somewhat lower than in the total sample, and similar to the levels reported by those with incomes in the $30,000 to under $40,000 range, suggesting those who do not report their income tend to be lower household incomes.

Access to train bus and ferry

Access to these forms of public transport also affected taxi use as shown in Figure 4.

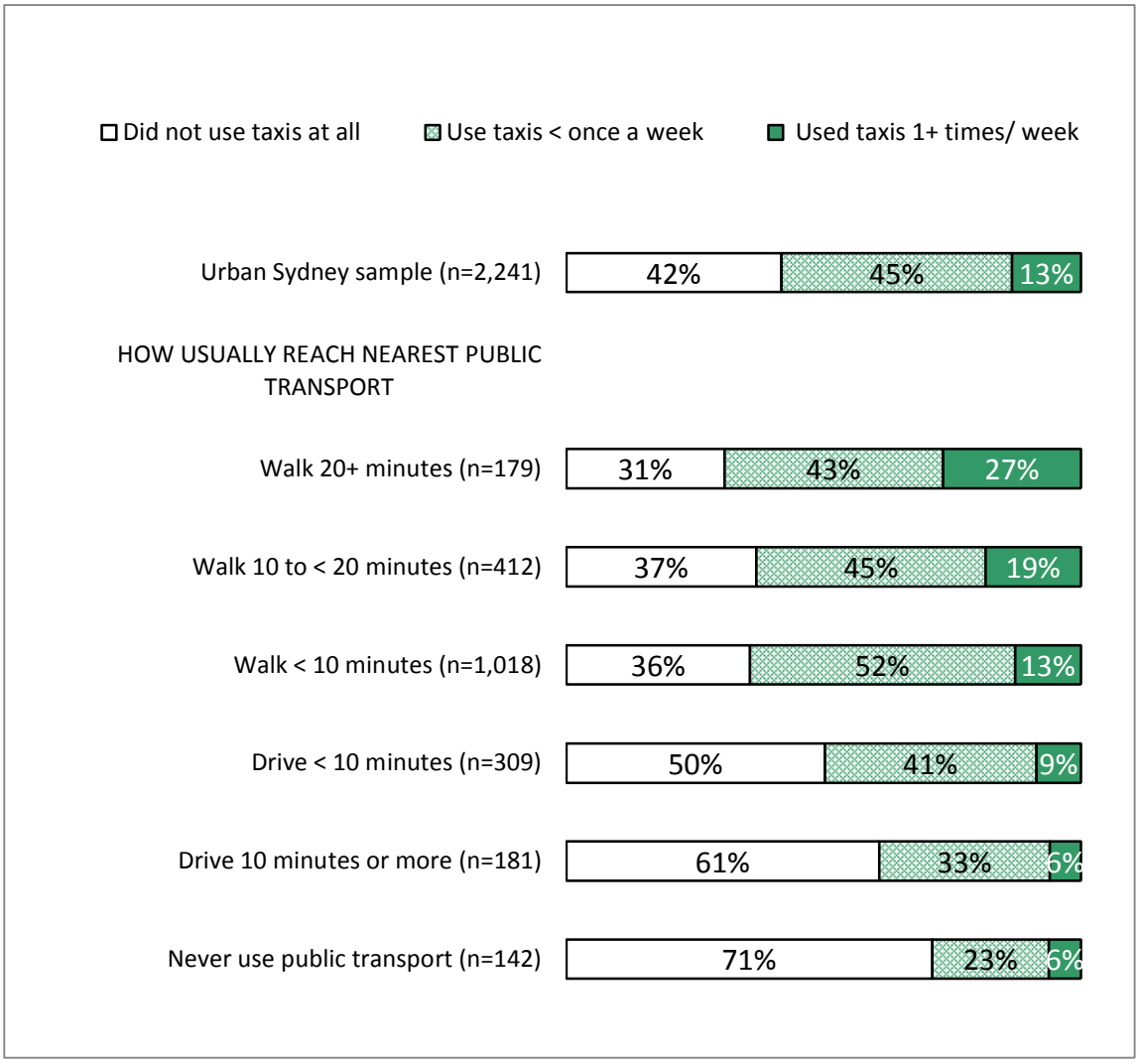
Taxi use was not significantly related to the time taken to walk to the nearest train, bus or ferry stop for those who usually walk, although using a taxi did appear more likely for those who need more than 20 minutes to make the walk (69% had used a taxi in the previous six months compared to 63 to 64% of those with a shorter walk). Using a taxi at least once a week declines significantly as the time taken to walk to the nearest train, bus or ferry stop decreases for those who usually walk.

Where the nearest public transport stop is usually reached by car, taxi use is much lower, especially for those who usually make a car trip of 10 minutes or more to reach that stop.

Those who said they never use public transport (and thus were the most likely to us their car) were the least likely to use a taxi (29% had done so in the past six months).

As in the 2013 survey, it appears that owning and usually using a car to reach the nearest public transport in itself inhibits taxi use. The results also suggest that the time usually taken to reach public transport has an effect on whether a taxi has been used and a more substantial effect on how often a taxi has been used. Those who usually reach public transport on foot show increasing frequency of taxi use as the time taken to walk to public transport increases and those who usually use a car to reach their nearest public transport are more likely to use a taxi if it takes them longer to reach the nearest public transport by car.

Figure 4. Taxi use by accessibility of public transport in Urban Sydney 2014



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

Number of cars in household

Use of taxis also varied 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 was:

- 69% of n=237 with no car in the household
- 62% of n=926 with one car in the household
- 53% of n=747 with two cars in the household
- 52% n=331 with three or more cars in the household

Those with no car in their household were about as likely to report using a taxi at least once a week (16%) as those with

one car in the household (17%) and more likely to report using a taxi at least once a week if there was more than one car in the household, (9% if two cars and 9% if three or more), but these differences are not statistically significant.

Using a taxi two or more times a month showed a larger effect of the number of cars in the household, with those without a car or with only one being more likely to use a taxi at least twice a month than those with two or more cars in the household:

- 29% of n=237 with no car in the household
- 28% of n=926 with one car in the household
- 17% of n=747 with two cars in the household
- 18% of n=331 with three or more cars in the household

Summary

As found in 2012 and 2013, the 2014 results confirm that income has an effect on frequency of taxi use. Further, for people with a disability, use is common and 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 much 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.

Having a car in the household and having two or more cars 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 2014 and 2013, and for the total Other Urban and Country samples in 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 were slightly more likely to report their use of taxis has decreased than to report their use of taxis has increased. The difference of six percentage points in the percentage reporting increased use in urban Sydney (16%) and decreased use (22%) approached but did not reach statistical significance ($p<0.09$). This pattern was consistently seen in the 2013 and 2014 Urban Sydney results and the Other Urban and Country locations in 2014. It appears that slightly more people believe they have reduced taxi use than believe they have increased taxi use.

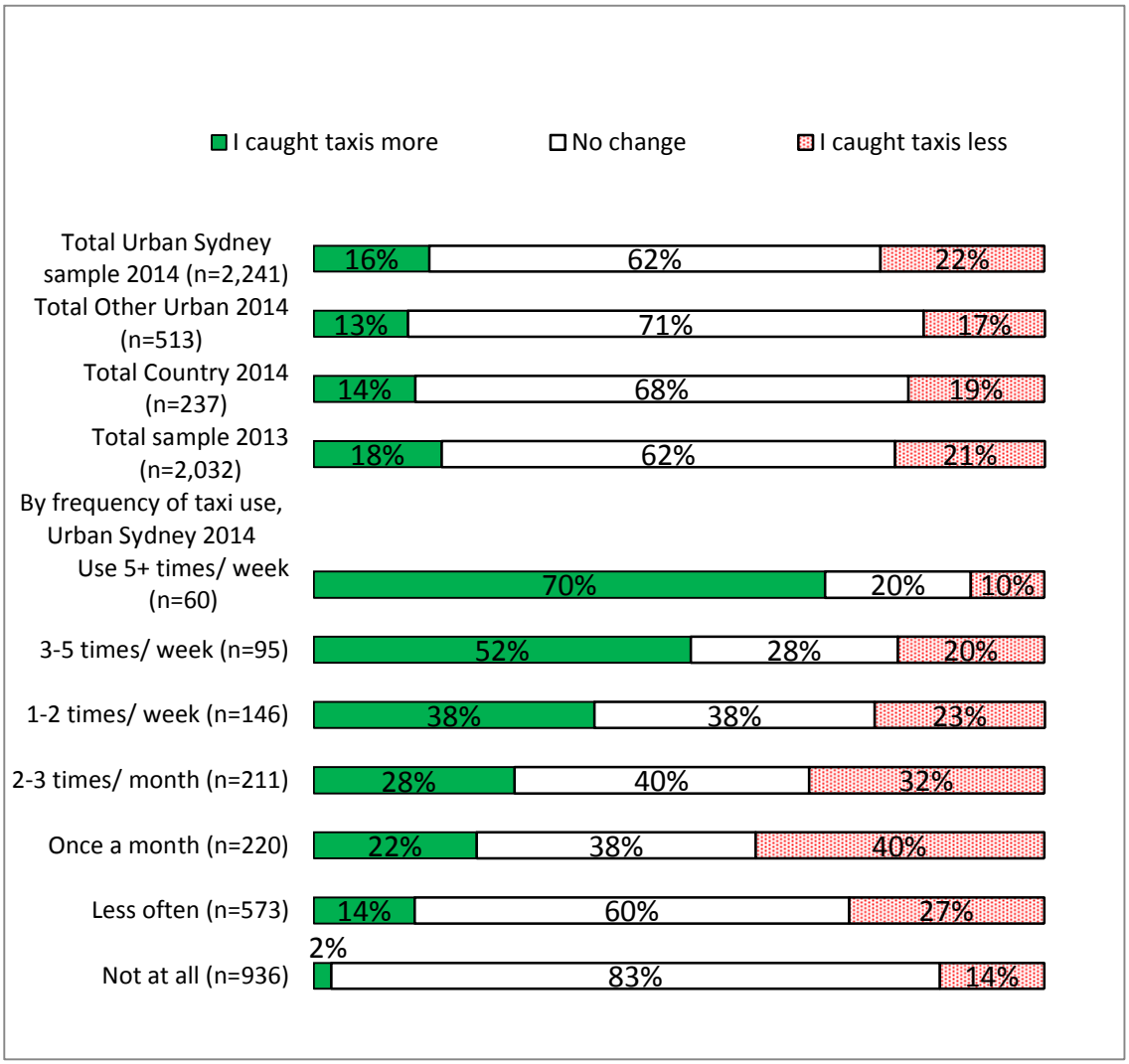
There were no differences between the samples large enough to suggest real differences over time or by location.

As was found in 2013, the balance between increased and decreased use was 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 were more likely to report increased than decreased use, while those using once a month or less were more likely to report decreased use. Those reporting no use in the past six months were the most likely to report no change in use. Reporting no change in use was 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.

The slight but consistent trend for respondents to be more likely to report their use is declining rather than increasing might be in part due to a "memory decay" effect – that less recent use is less likely to be recalled than more recent use.

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 in Sydney….

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 6 shows the results for the three surveys with the 2014 locations shown separately.

In Urban Sydney (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. This was significantly less common in the

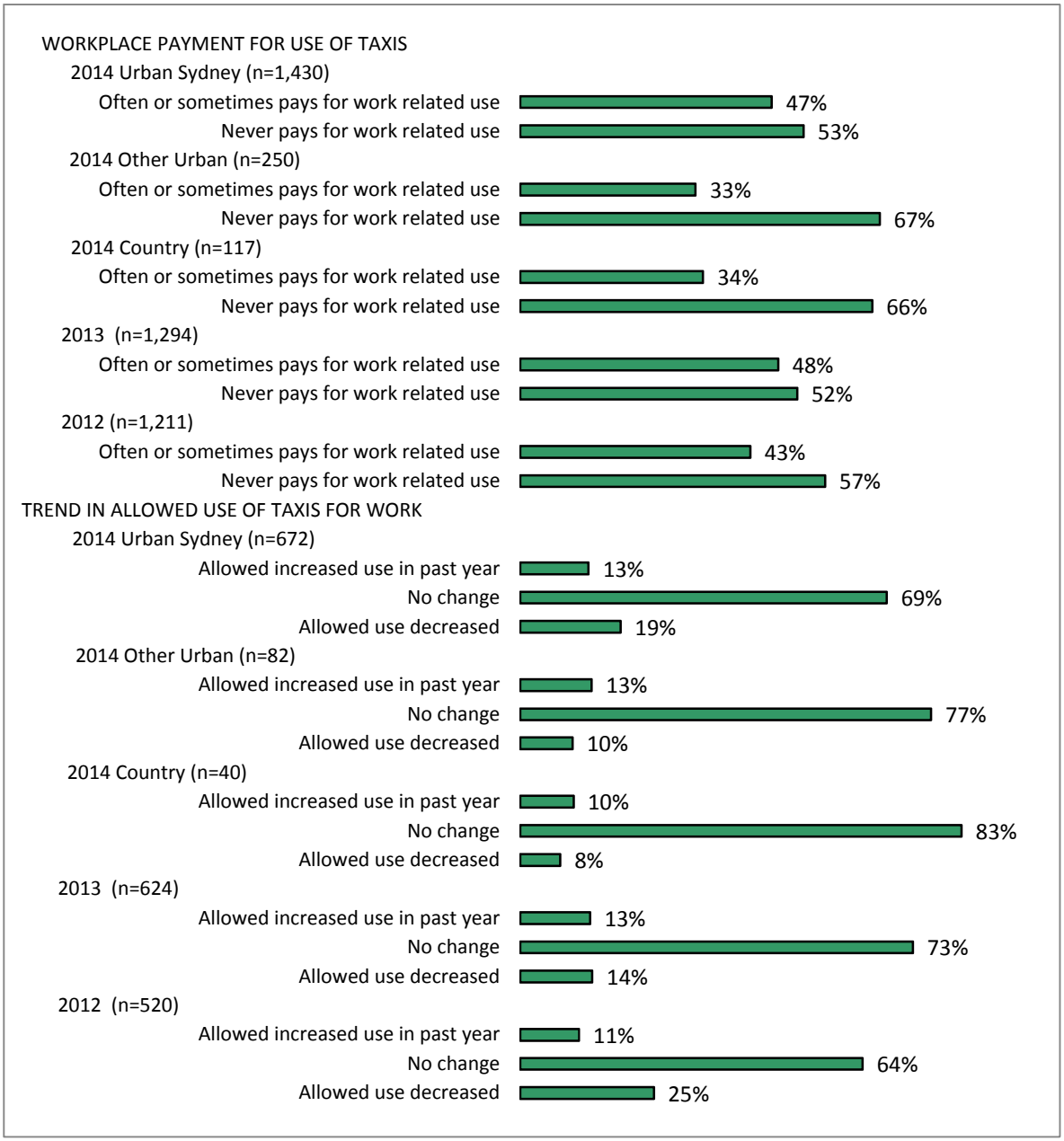
2014 Other Urban and country locations, where around two thirds of those who worked reported their workplace never pays for work-related use of taxis.

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 was in Sydney in 2012.

Among those who used a taxi for work purposes, reporting that use of a taxi for work purposes was allowed less often was much less common in 2014 and 2103 than in 2012 (13 to 14% compared to 25%).

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

Figure 6 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
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.

4.3. Reasons for change in use

The n=355 in 2013 and the n=355 in Urban Sydney in 2014 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 7).

Need (going out more or reduced access to alternatives) was the main reason for increased use followed by increased capacity to pay. This was also true among the 2014 Other Urban (36% of n=66) and Country (36% of n=33) samples.

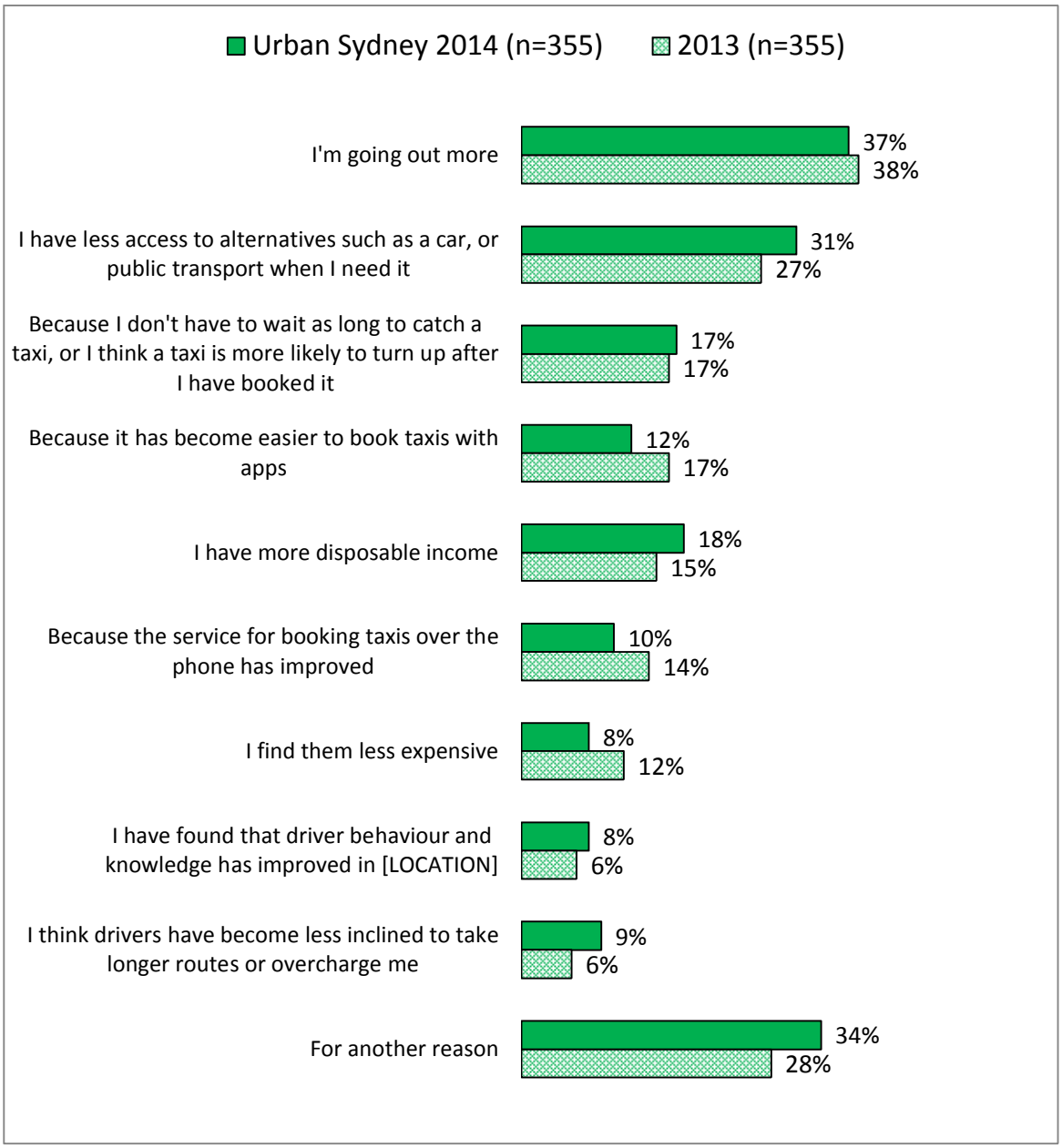
A range of improvements in the service provided by taxis were also endorsed but at much lower levels. One quarter to one third had a reason not included in the prompted list.

Figure 8 shows that for Urban Sydney respondents in 2014, increased cost was the most widely endorsed reason for reduced use followed by reduced need (going out less or better access to a car) and reduced capacity (lower disposable income) among the n=416 who reported they use taxis less. However, increased cost was significantly less prominent as a reason in 2014 (48%) than it had been in 2013 (57%).

Improved public transport and a variety of reductions in the perceived quality of taxi services were also endorsed by some. Few indicated they had other reasons apart from those listed (9%).

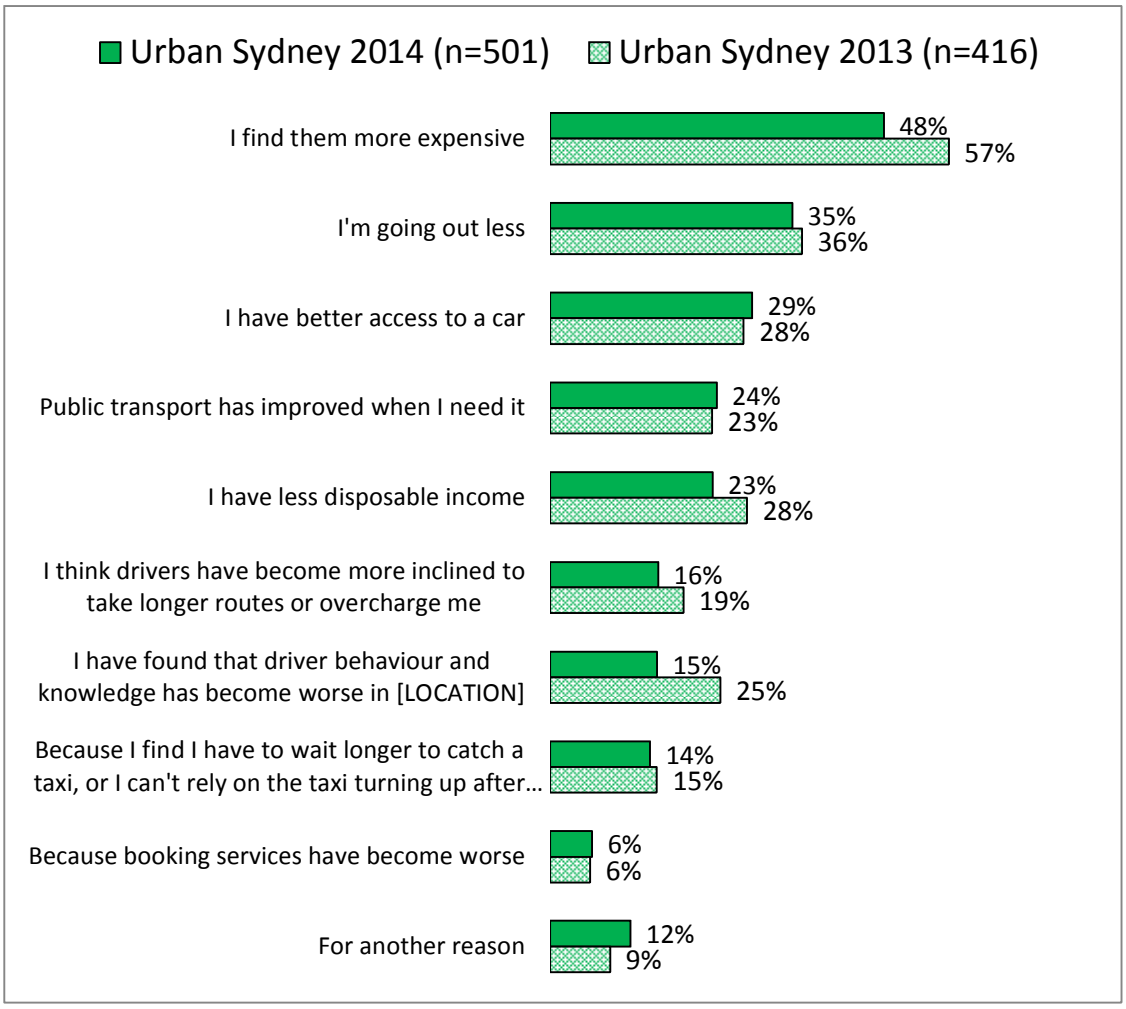
The sample sizes for those surveyed in Other Urban and Country locations in 2014 were small enough to limit confidence in the reliability of the results (n=85 for Other Urban and n=44 for Country). For both, "going out less" was more often selected than in Urban Sydney (45% and 43% compared to 35%) and finding taxis more expensive was less likely to be nominated (40% and 34% compared to 48%). Improved public transport was also less likely to be selected in Other Urban (12%) or country (2%) locations than in Urban Sydney (24%), as was worse driver behaviour (4% and 2% compared to 15%). Given the sample sizes there was little room for these differences to be statistically significant.

Figure 7. Reasons for increased frequency of use



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

Figure 8. Reasons for decreased frequency of use



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

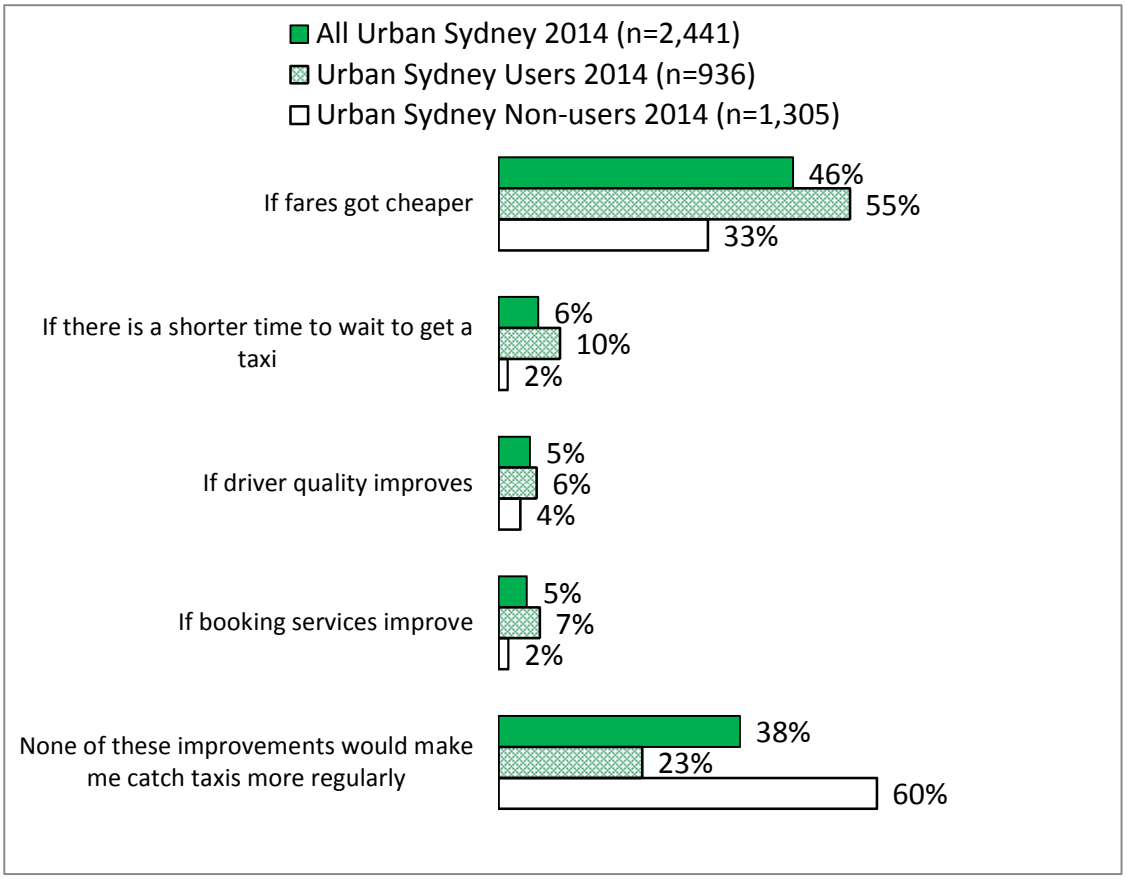
4.4. Future use

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 9.)

Although 2014 Urban Sydney users are more willing than non-users to say they would increase use in response to the prompted improvements, "cheaper fares" are 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 10% of users and 2 to 4% of non-users. Non-users were even more likely (60%) than users (38%) to reply that none of these improvements would make them catch taxis more regularly.

In Other Urban and Country locations, cheaper fares was also the dominant reasons that would prompt increased use especially among users (54% of n=198 Other Urban users and 47% of n=106 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 2014, as it was in the Urban Sydney region in 2013.

Figure 9. 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)

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 10). This was true in Urban Sydney in all three surveys to date, and also in the 2014 Other Urban and Country locations.

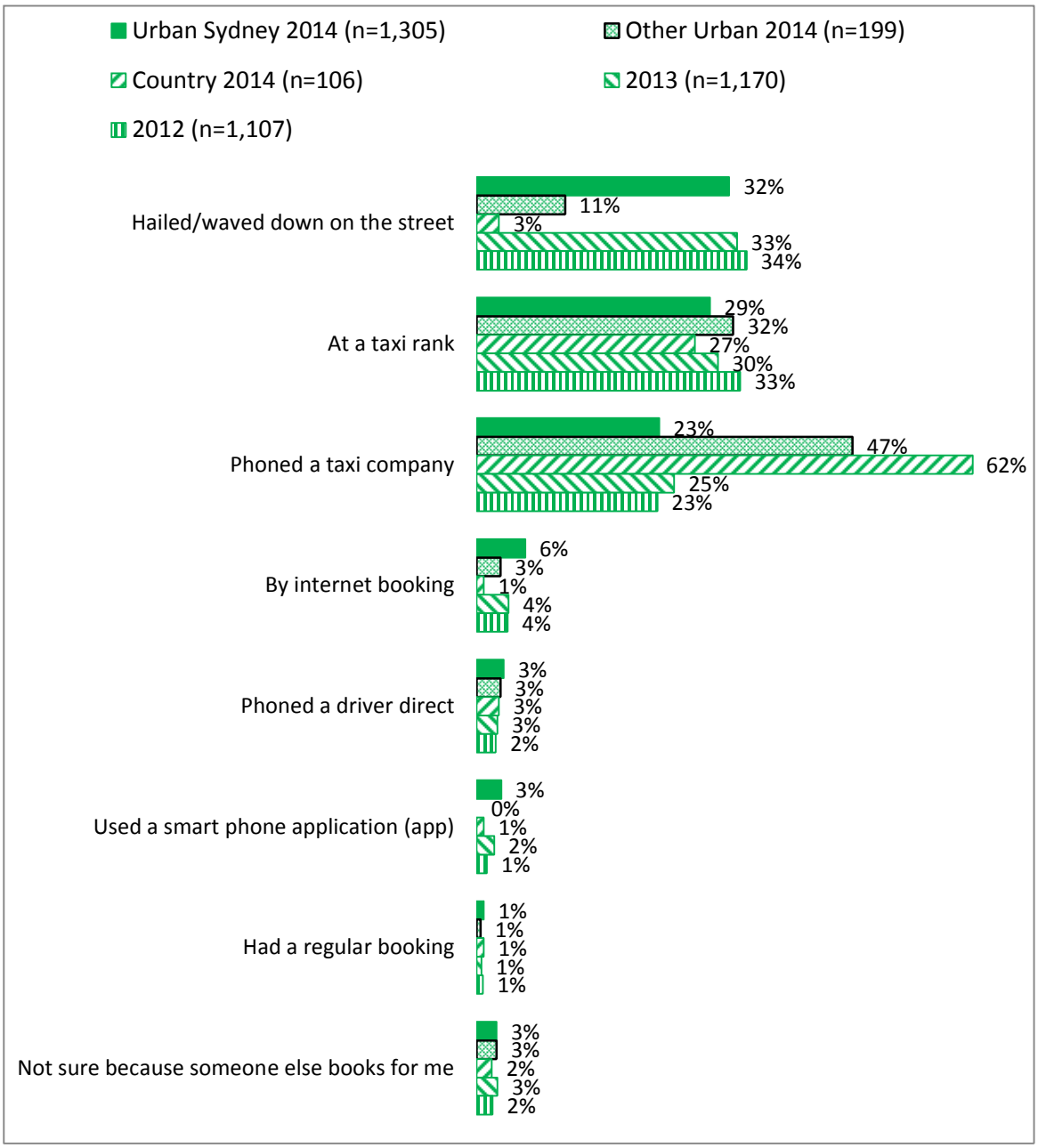
These accounted for 84% of the Urban Sydney occasions captured in 2014 (88% in 2013), 91% in Other Urban locations and 92% in Country locations.

Alternative methods enabled by mobile or internet technology accounted for only 9% of these trips in Urban Sydney, 4% in Other Urban locations and 2% in country locations. Only 3% in Urban Sydney (2% in 2013) had used a smart phone app, similar to the percentage who had phoned a driver direct and about half the percentage who had booked over the internet. There was little change from 2012 to 2013 to 2014 in Urban Sydney methods.

However, there were marked differences in the method used to obtain a taxi between Urban Sydney, Other Urban and Country locations in 2014. The three traditional methods were about equally often used in Urban Sydney, with slightly fewer making a phone booking (23%) than taking the cab at a rank (29%) or hailing a passing cab (32%). Hailing a passing cab was much less common in the Other Urban areas (11%) and very rarely reported in Country locations (3%). Phoning for the taxi was much more common in the Other Urban locations (47%) and was the dominant method in Country locations (62%). The proportion catching their last cab at a taxi rank was quite similar in all locations – 29% in Urban Sydney, 32% in Other Urban and 27% in Country locations. These differences probably reflect the different availability of taxis and the different locations where they are taken as described later.

Among the 42 who had used an app in 2014 (40 in Urban Sydney and 1 each in the other two regions), the most often used were Mtaxi (24%), Legions (36%) and Silver Service (17%). Gocatch was reported by a few (10%). Six (14%) had used another app not listed in Q22a. Legions had increased sharply from 2013 and Mtaxi was less dominant, but given the small sample bases, no firm conclusions about shifts in market share can be drawn.

Figure 10. How taxi obtained



Q22. I got the taxi …

5.2. Waiting time

Respondents who had taken a taxi in the past six months were asked how they got that taxi (Q23b) and how long it took for the taxi to arrive (see Figure 11).

In 2014 boarding at a rank and hailing a passing cab were both much more likely than booking the next available cab to involve less than five minutes waiting time (58% and 40% compared to 11%) and more likely to require less than 10 minutes waiting time (both 63% compared to 50% for booking the next available cab). The advantage for boarding at a rank might not take into account the time taken to reach the rank.

These 2014 results were close to those found in 2013 and 2012.

Effect of location, 2014

The samples using the different methods in Other Urban and Country locations in 2014 were generally too small to allow firm conclusions to be drawn. For those who booked the next available cab, there were n=77 in Other Urban and n=53 in Country locations. Waiting times when the next available taxi was 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.

Change over time

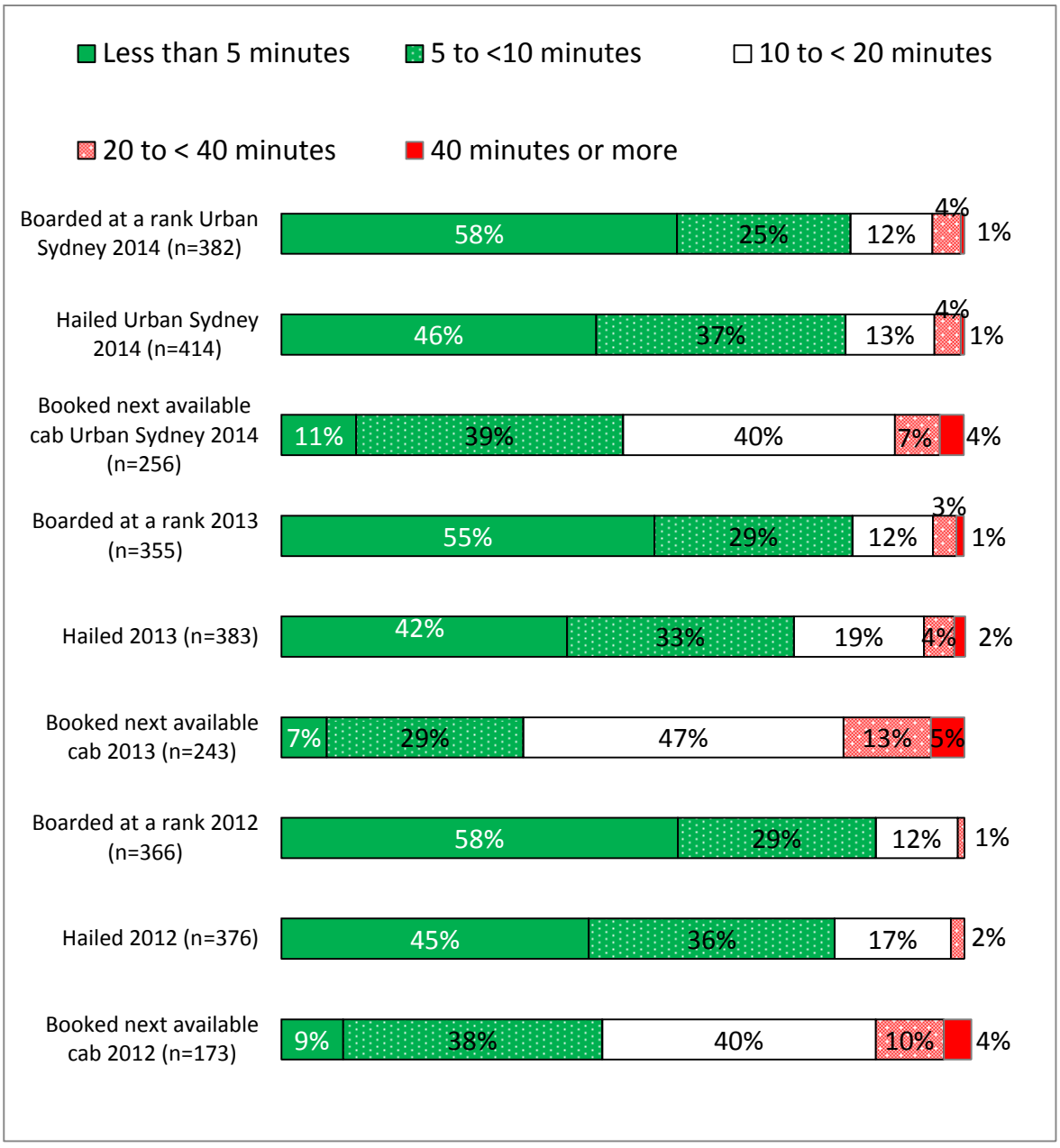
Even within Urban Sydney, the size of the samples using each method to obtain a taxi limit the power of comparisons between the three surveys.

However, there is no evidence of any significant shift in waiting times from 2013 to 2014 for those taking a taxi at a rank and for those hailing a taxi in the street. Both years show a non-significant trend for more users to report very long waits (20 minutes or more) than were reported in 2012.

For those who booked the next available taxi, waiting times in 2014 appear significantly shorter in 2014 and 2012 than in 2013 ($p<0.005$), with more reporting they waited less than ten minutes in 2014 (50%) and 2012 (47%) than in 2013 (36%). Thus the deterioration found in 2013 has been reversed.

There was little difference in long waiting times for those who booked the next available taxi (20 minutes or more for 11%, 18% and 14% in 2014, 2013 and 2012).

Figure 11. Waiting time by how taxi obtained



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" cab]

5.3. Arrival time performance

Figure 12 shows the arrival time performance of taxis booked for a particular time in the Urban Sydney region in 2014, 2013 and 2012.

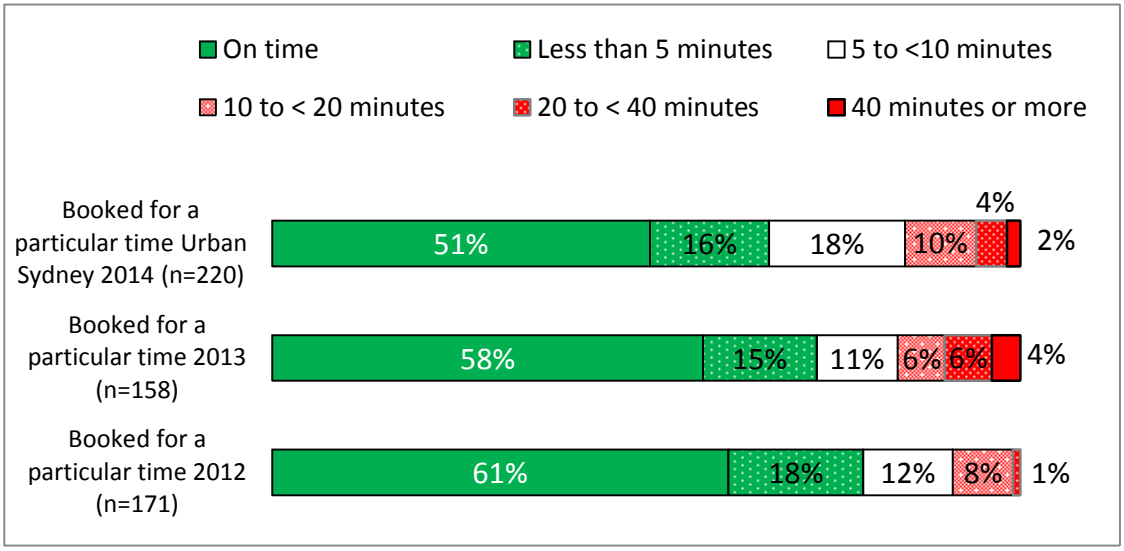
With 51% on time, 16% being less than five minutes late, and another 18% being less than 10 minutes late, in 2014 85% had

to wait less than 10 minutes, and 67% less than five minutes. This method had the best overall "time to boarding" performance.

However, performance for this method of obtaining a taxi appears to have declined significantly ($p<0.03$) from that found in 2013 which in turn was not as good as in 2012.

The samples for those who booked a cab for a specific time in Other Urban (n=31) and Country (n=19) locations are too small to allow any conclusions to be drawn about comparative performance.

Figure 12. Arrival time performance - booked for a particular time



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

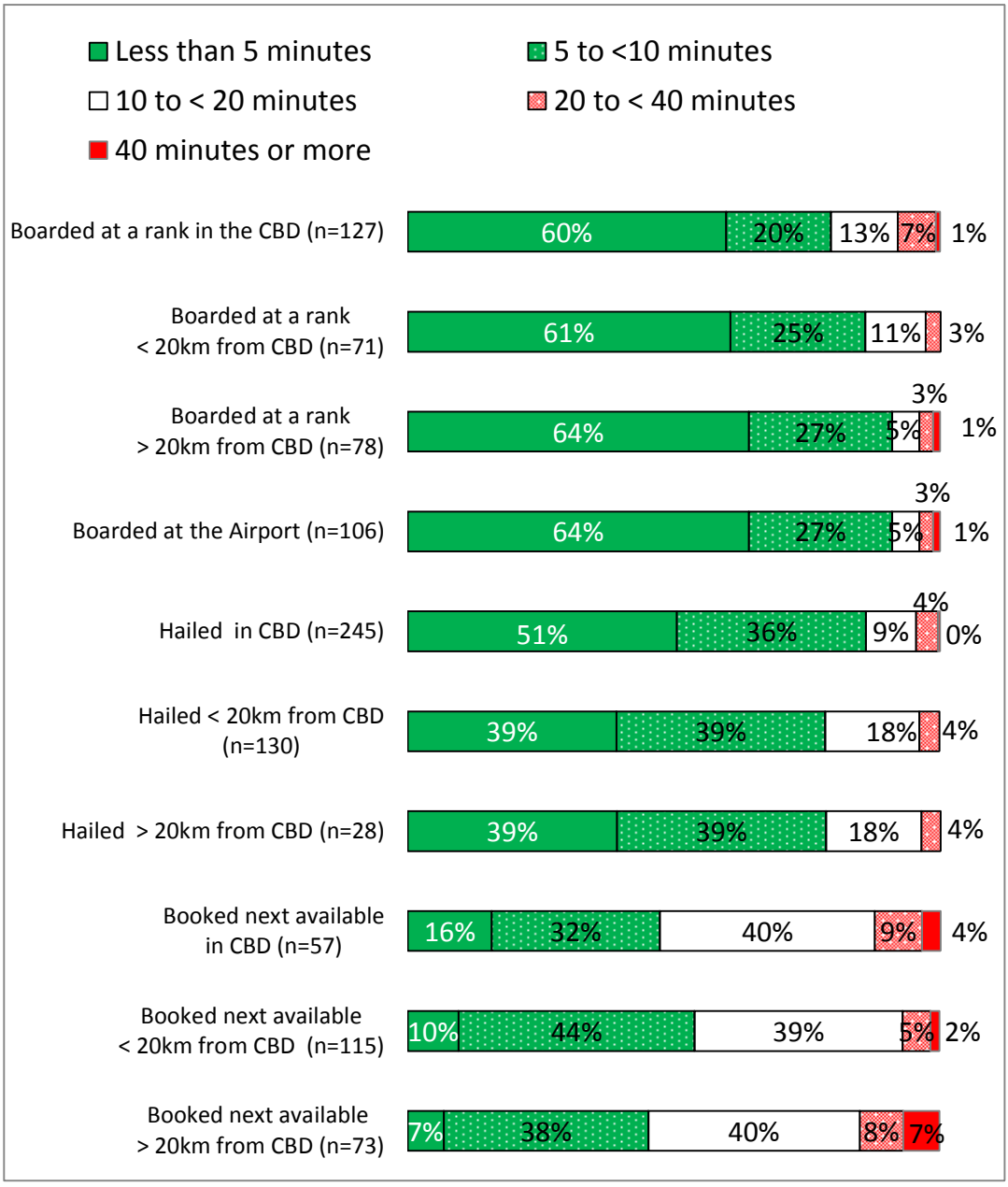
5.4. Waiting time and origin

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

Figure 13 shows the breakdowns. 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.

In 2014, hailing a passing cab appeared somewhat less likely to require less than 10 minutes than boarding a cab at a rank, especially outside the CBD. Longer waiting times reported when the next available cab was booked were confirmed for all starting points. In general, the method used to obtain the cab appeared more important than where the cab was obtained.

Figure 13. 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" cab]
NOTE: Treat with caution where n<50. Where n<20, result not shown.

5.5. Booked taxi aarrival time performance and origin

Figure 14 shows booked arrival time performance broken down by the origin of the journey.

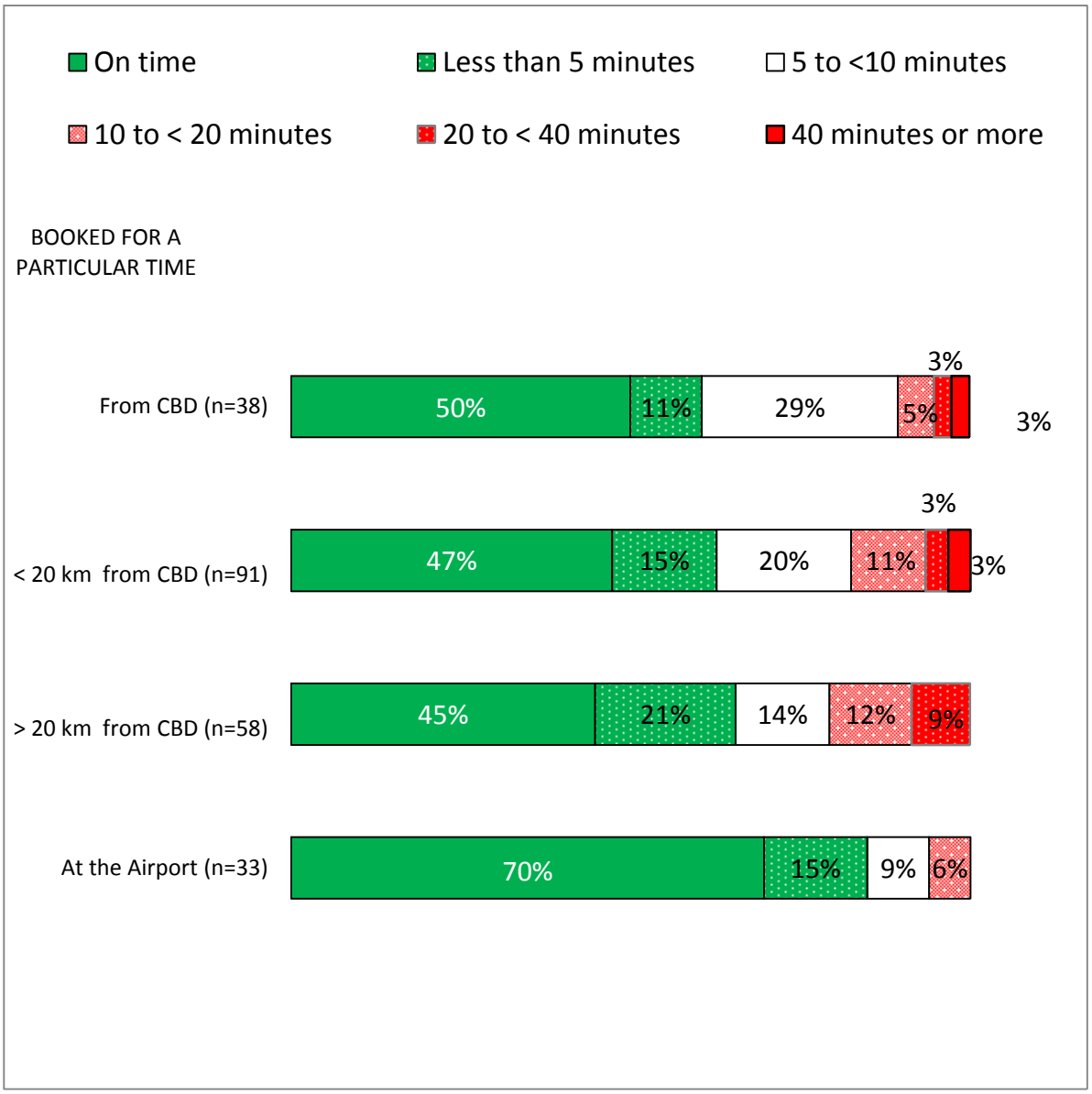
The best performance was reported for taxis booked for a particular time at the airport, but this sample was very small (n=33) and so the result might be quite unreliable.

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 combine on time arrival with arriving less than five minutes late.

The percentage that arrived on time or less than five minutes late when booked for a particular time ranged from 63% to 65% apart from the small group who reported having booked a taxi for a particular time at the airport, with a very high proportion involving waits of less than five minutes (85%). The percentage that waited less than five minutes for boarding at a taxi rank at any location (53%) and for hailing a cab at any location (43%) were 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.

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 14. Arrival performance and origin Urban Sydney 2014



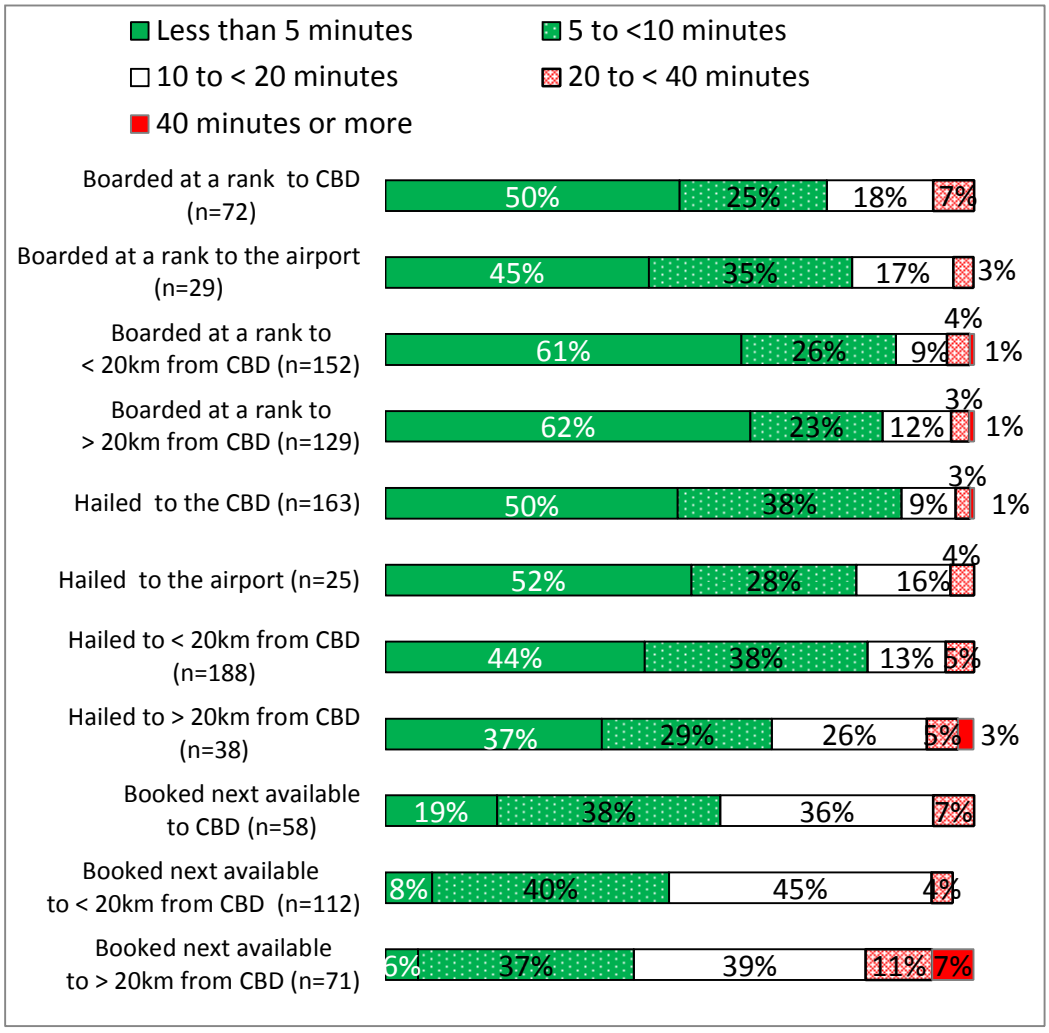
Q14. On my most recent taxi trip, I started my journey …
Q24b. The taxi arrived …
IF Q24 = booked a cab for a particular time
NOTE: Treat with caution where n<50. Where n<20, result not shown.

5.6. Waiting time and destination

Figure 15 shows the variations in waiting time by how the cab 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 base.

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

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

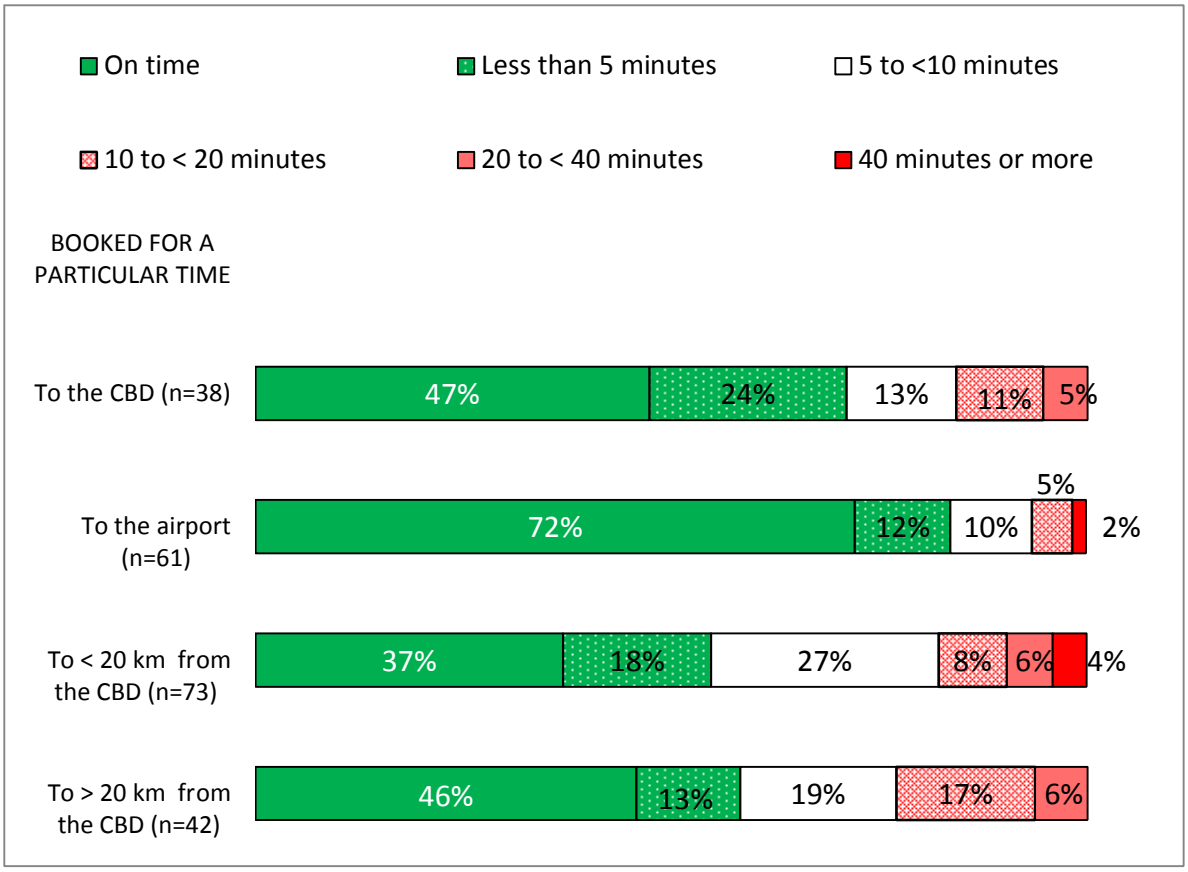


Q15. In my most recent taxi trip in Sydney, I got out of the taxi …
Q23a. At the rank I had to wait …
Q23b. By hailing a taxi from the street I got a taxi in …
Q24a. (Booked … the next available cab and) Had to wait …
NOTE: Treat with caution where n<50. Where n<20, result not shown.

5.7. Arrival time performance and destination

In 2013 arrival time performance did not vary greatly by the destination. There were some more substantial differences by destination in the 2014 Urban Sydney results. Booked time journeys to the airport are significantly and substantially more likely to be on time than journeys to other destinations (see Figure 16). A trend in this direction had also been noted in 2013.

Figure 16. Arrival performance and destination Urban Sydney 2014



Q15. In my most recent taxi trip in Sydney, I got out of the taxi …
Q24a. I booked … a cab 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 is broken down for each mode of getting a taxi in Figure 17.

Only 16 cases reported taking a taxi at a rank on a Sunday (after 5am) only 19 reported hailing a cab during the day on Sunday (after 5am) and only 17 cases reported booking the next available cab on a Sunday. These results are not shown due to the low sample bases.

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, or those taken at a rank Friday or Saturday or Monday to Thursday. Waiting less than five minutes to board a taxi at a rank was more common for taxis caught at a rank on Monday to Thursday than those caught on Friday or Saturday (but not significantly so). 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.

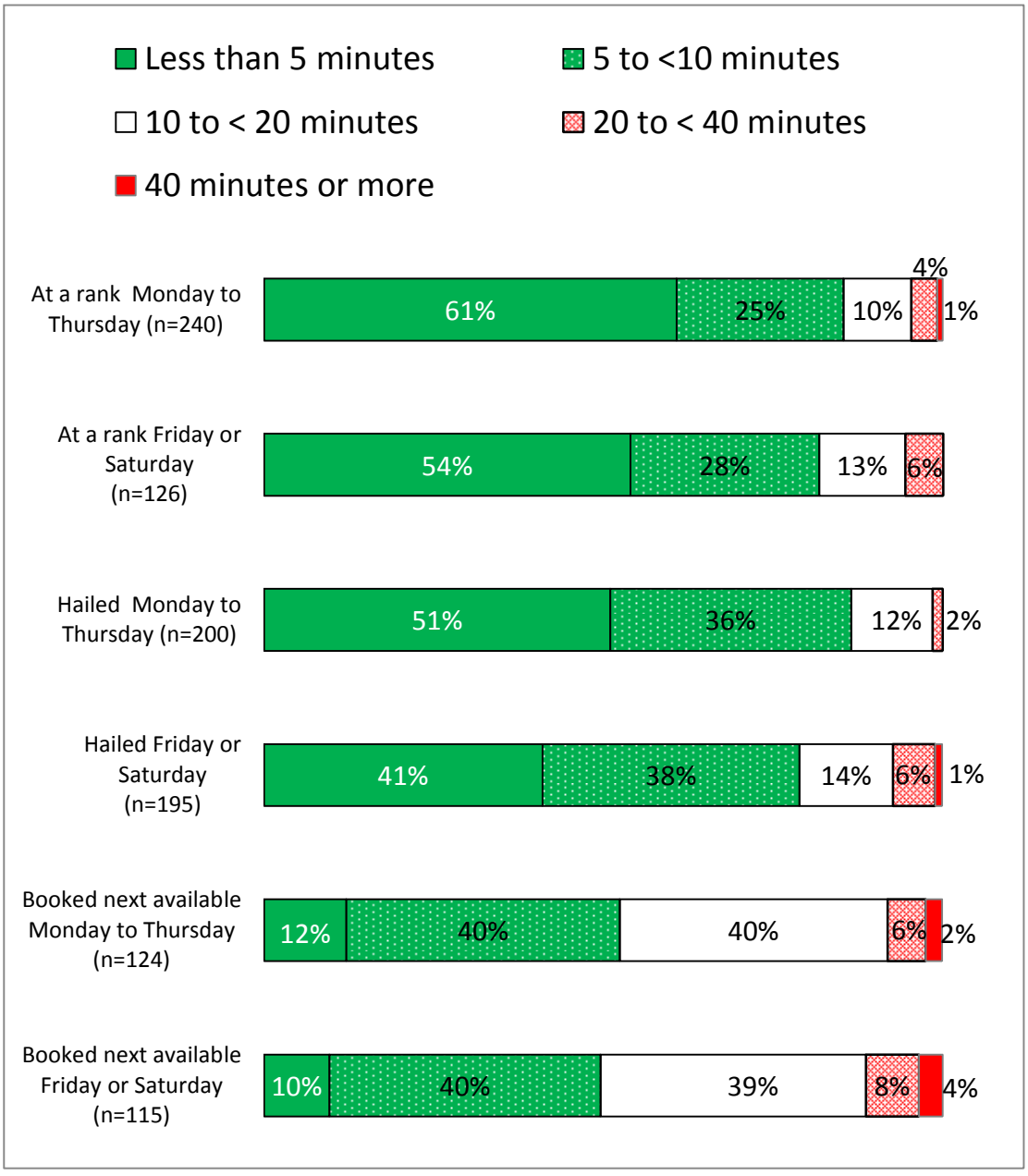
Waiting time is much more likely to be 10 to 20 minutes when the next available taxi was booked than if the taxi was hailed from the street or obtained at a taxi rank.

Waiting times of more than 20 minutes varied very little by how the taxi was obtained or which day of the week it was taken.

In this survey the effect on waiting time 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 boarded at a rank or hailed from the street are less likely to be under five minutes on Friday or Saturday than on Monday to Thursday. This is consistent with the results in 2013. It appears there has been a drop in long waits (20 minutes or more) from 2013 to 2014 for when the next available taxi was booked but these reductions are not statistically significant (18% to 6% on Monday to Thursday, and 18% to 12% on Friday and Saturday, comparing Figure 17 below to the same figure in the 2013 report).

Figure 17. Waiting time by how taxi was obtained and day of week, Urban Sydney 2014



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

5.9. Arrival time performance and day of week

Figure 18 shows 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 33 cases and must be treated with caution.

There was a significant and substantial difference in on time performance for bookings made for a particular time between those made on Monday to Thursday (65% on time), on Friday or Saturday (41% on time), and Sunday (21% on time)

The end of week results were also significantly more likely to be at least 10 minutes late (23% for Friday and Saturday bookings, 30% for Sunday bookings and 7% for Monday to Thursday bookings).

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.

The percentage that arrived on time or less than five minutes late when booked for a particular time ranged from 42% to 83%. The highest percentage that waited less than five minutes for other modes of obtaining a taxi on any day was 61% on Monday to Thursday at a taxi rank and the lowest was 41% for taxis hailed on a Friday or Saturday.

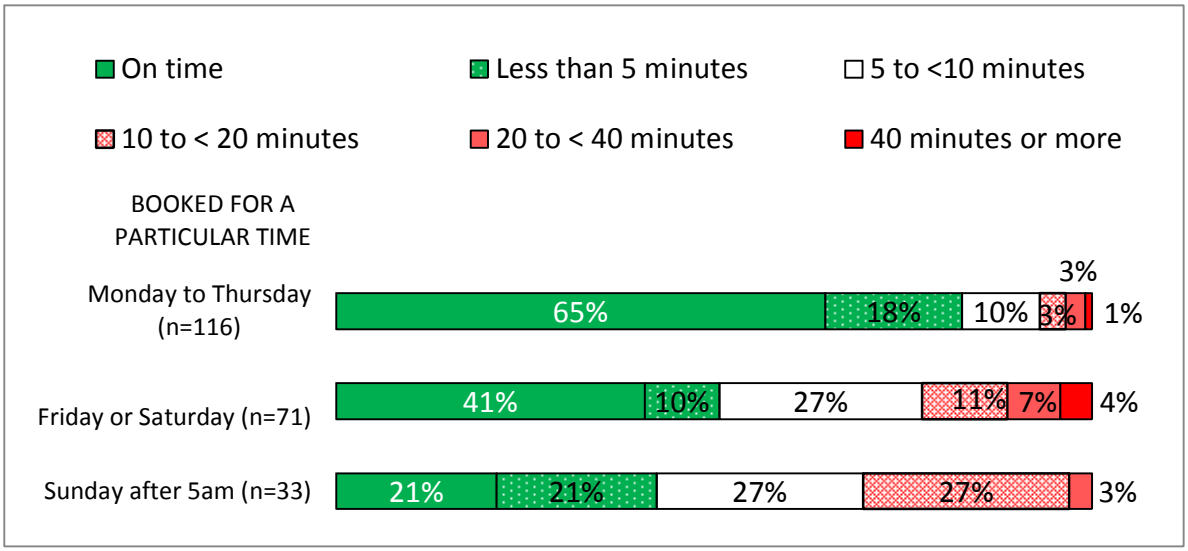
It appears that:

- 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 was 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

Comparing the results for Urban Sydney in 2014 to those for Sydney in 2013 is limited by the sample sizes. The differences in the distribution of waiting times on Monday the Thursday was not large, but showed a drop in waiting times of 10 minutes or more (7% in 2014, n=116; 14% in 2013, n=111). The samples for Friday and Saturday (n=71 in 2014, n=30 in 2013) were too small

for valid conclusions to be drawn but were consistent with concluding that longer waiting times might have improved and have not increased.

Figure 18. Arrival performance by day of week Urban Sydney 2014



Q14. On my most recent taxi trip, I started my journey …
Q24. I booked … a cab 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 19 shows the variations in waiting time by how the cab was obtained and the time of day.

Time of day has no significant effect on waiting time at a taxi rank or on the time to obtain a taxi by hailing.

There was a consistent pattern for hailing a taxi in the street to be more likely to take five minutes or more than catching one at a taxi rank. The differences ranged from 3 to 20 percentage points and excluding the morning period from 11 to 20 percentage points. While only some of these differences are statistically significant the consistency of outcome suggests that the effect is real with the possible exception of the morning period.

Differences in the percentage waiting ten minutes or more are inconsistent.

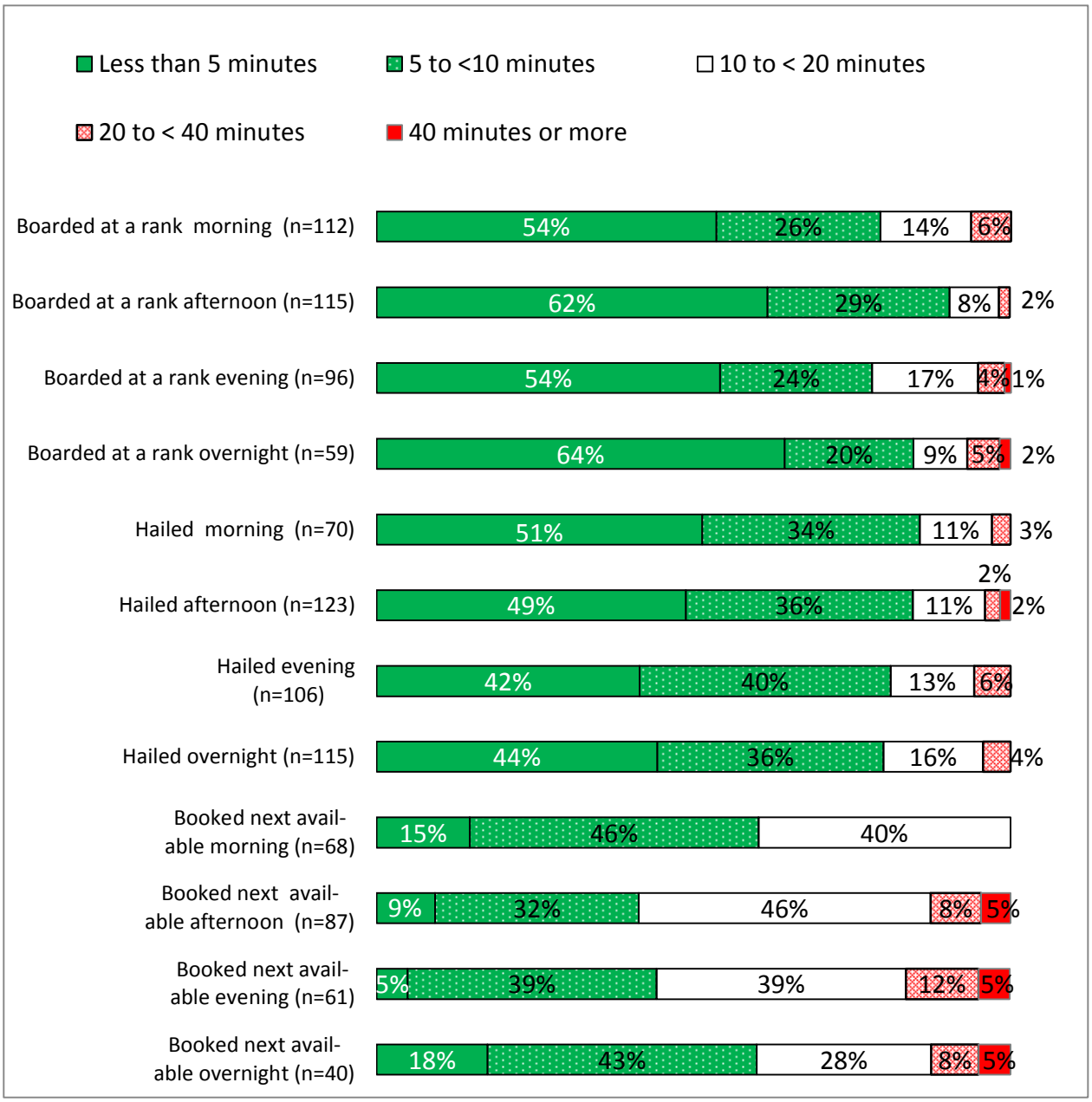
Short waiting times were significantly less likely when the next available cab was booked, regardless of time of day.

Those booked in the afternoon or evenings were significantly less likely to arrive within 5 minutes than those booked in the morning or overnight.

Thus, the mode of acquiring a taxi was much more important than the time of day, with those who booked the next available taxi having longer to wait than others, and a trend for those who hailed a cab on the street to wait longer than those who caught a taxi at a taxi rank.

These results are similar to those obtained in 2013, although not identical. There was a consistent trend for waiting times to be shorter in 2014 when a taxi was hailed or the next available taxi was booked in the evening or overnight. This is consistent with other data indicating some improvement in waiting times in 2014 and suggests the improvement occurred at the times of day when there can be more pressure on the available supply of taxis.

Figure 19. Waiting time by time of day and how taxi obtained
Urban Sydney 2014



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

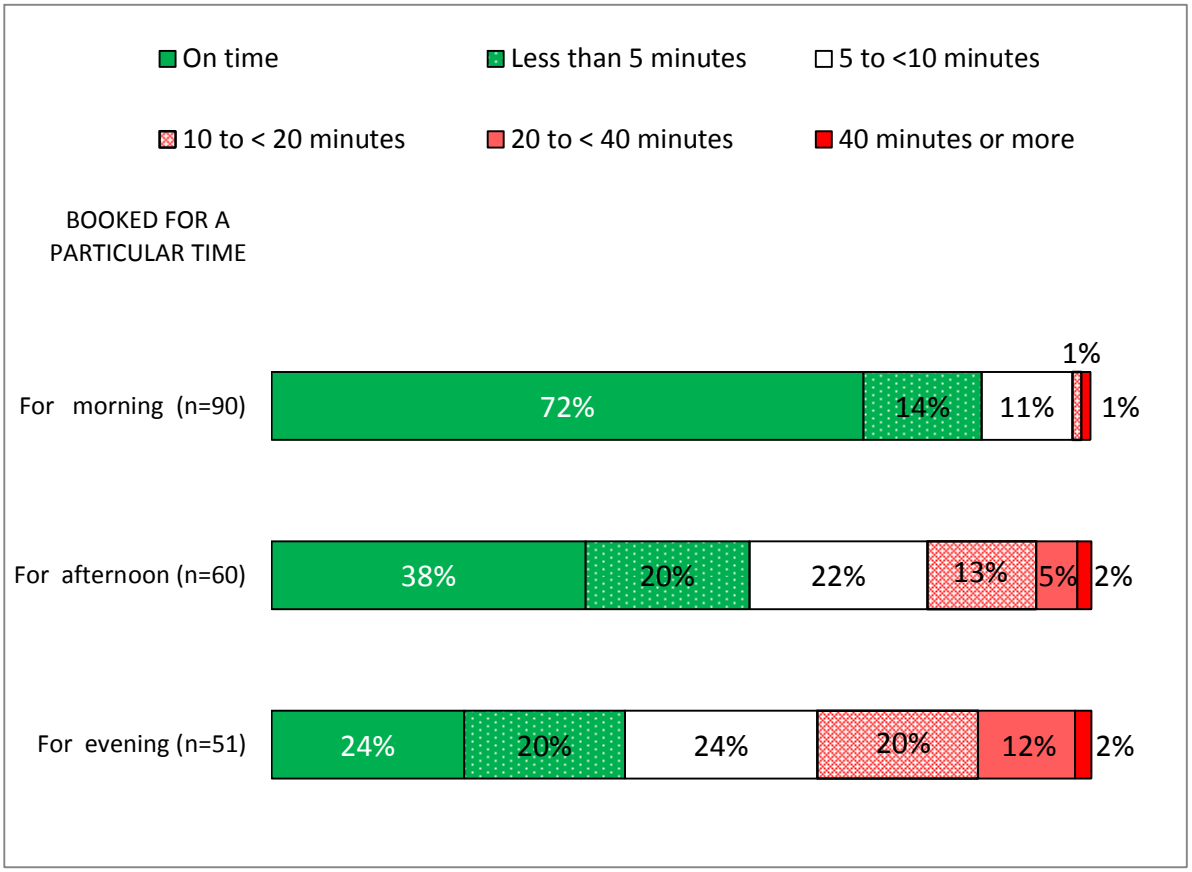
5.11. Arrival time performance and time of day

On time arrival for taxis booked for a particular time appeared somewhat slower 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 20. With the somewhat larger samples obtained in 2014, the difference between morning and other times is statistically significant.

The results are not shown for the 19 respondents who reported booking a taxi for an overnight time due to the small sample base but fell in between the afternoon and morning results.

There was a trend for those ordered for the afternoon and the evening to be less likely to arrive on time in 2014 than in 2013, but the limited sample sizes prevent any firm conclusion being drawn about changes in performance.

Figure 20. Arrival performance and time of day booked Urban Sydney 2014



Q24b The taxi arrived … BY
Q19. My most recent taxi trip in Sydney was … morning (day break to before midday) / afternoon (midday to before 6pm) / evening (6pm to before 10 pm) / overnight (10pm to daybreak)

5.12. Arrival time performance and time of day by day of week

It would be useful to analyse waiting time and arrival performance by time of day for the different days of the week. However, the base numbers when this is done separately for each way of getting a taxi are too small to allow any conclusions to be drawn.

To achieve larger sample bases, the results for those who took a taxi at a rank, hailed a taxi, booked the next available cab or booked for a specific time could be combined. To align the response categories where a taxi was booked for a specific time, arriving on time and arriving less than five minutes late were combined. The results are shown in Figure 21.

Figure 21 also allows comparisons of the 2014 results with the results obtained in 2013 and 2012 within each category. This allows conclusions to be drawn about any changes in waiting time independent of changes in the mix of times of day and days of week in the sample of most recent taxi journeys captured in the two surveys.

For **Monday to Thursday**, the increased waiting times evident in 2013 have largely reversed in 2014 back to being very close to the 2012 results. Only the very small samples for taxis taken overnight break this trend.

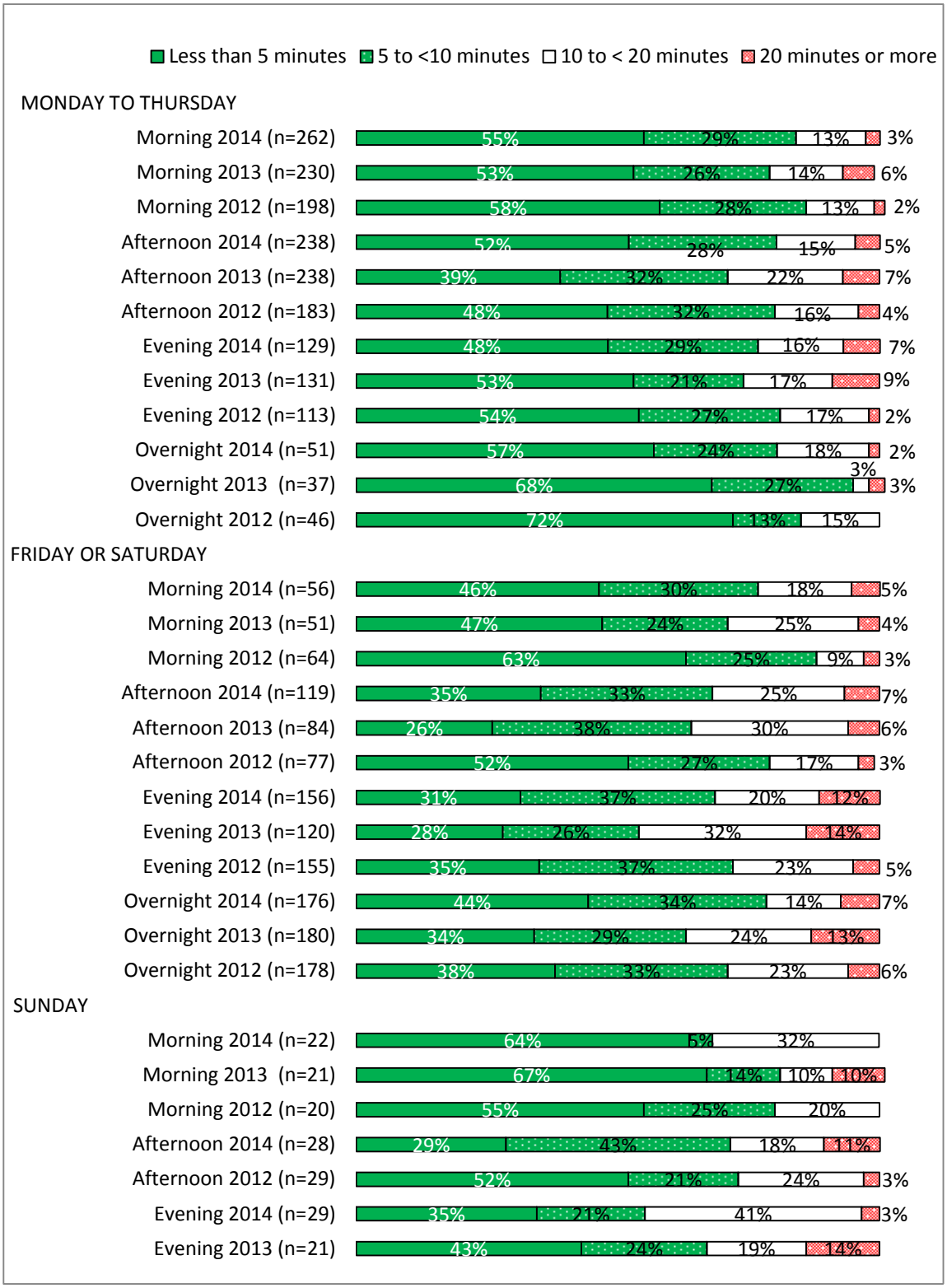
For **Friday through to Sunday** morning before 5am (only specified as "Friday or Saturday" in 2012), the same pattern is evident.

No conclusions can be drawn about changes for journeys taken on Sunday, as the base numbers within time periods are too small to give reliable results.

It appears that waiting times have been reduced throughout the week after increasing in 2013 and have returned close to those found in 2012.

It is likely that these results could be biased if the samples varied considerably in the proportion of respondents who had booked a taxi for a specific time, as arriving within five minutes is more common for taxis obtained in that way. Variations in having booked the next available taxi could also have an effect, as this method is associated with longer waiting times.

Figure 21. Waiting time by time of day within day for 2014 Urban Sydney



Constructed variable: waiting time regardless of how taxi obtained (Q23a, Q23b, Q24a, Q24b) broken down by time of day within day of week.

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

Figure 22 shows the average number of "most recent" trips taken per day broken down into trips taken Monday to Thursday, Friday to Sunday morning before 5am and on Sunday after 5 am.

For Monday to Thursday, the total number reporting that their last trip was on one of those days was divided by four to arrive at a number of most recent trips per day. For Friday and Saturday, the number reporting a last trip on those days was divided by two. Last trips on a Sunday were for a single day thus required no correction for number of days.

The trips per day are further broken down by time of day and method used to obtain the taxi.

All data are for Urban Sydney in 2014.

There are marked differences in the pattern of trips per day by time of day between trips taken on Monday to Thursday and trips taken on Friday or Saturday.

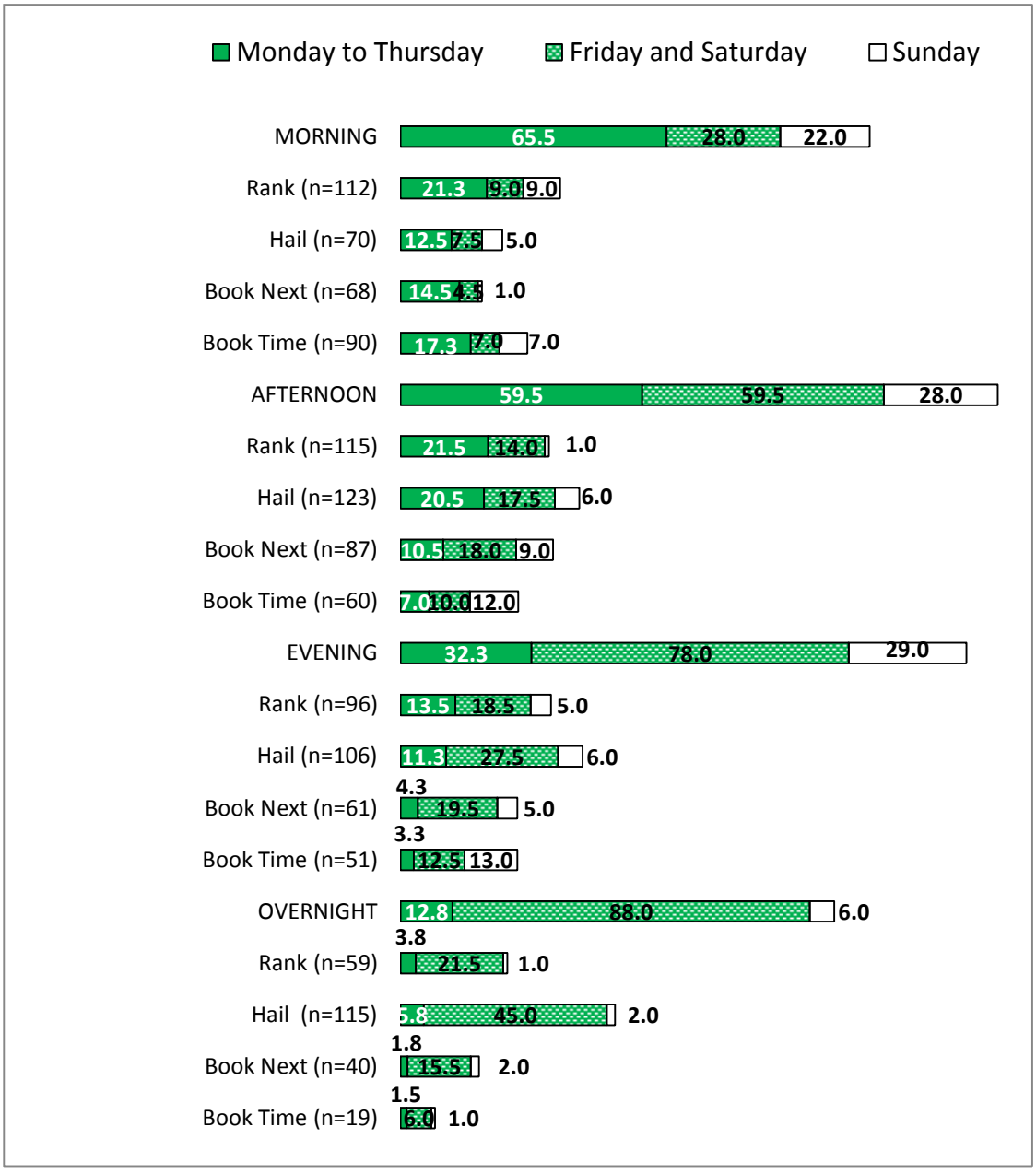
On Monday to Thursday more trips are taken in morning than the afternoon, with fewer in the evening and very few overnight. On Friday and Saturday, this pattern reverses, with the largest number of trips per day taken overnight, followed closely by evening trips, then afternoon trips, with relatively few in the morning.

Fewer taxi trips are taken on Sunday than on other days of the week, with the trips most likely to be in the evening, followed by the afternoon then the morning, with very few overnight.

The method used to obtain the taxi also varies with day of week and time of day. Overnight trips are particularly likely to be hailed in the street, especially on Friday and Saturday. Evening trips on Friday and Saturday are also more likely to be hailed in the street, followed by taking the taxi at a rank. The gap between hailing and using a rank is much smaller on Monday to Thursday. Booking is generally less common than taking a taxi from the street, especially in the evening and overnight.

These patterns are consistent with a much higher proportion of trips taken on Friday and Saturday being associated with going to and from entertainment venues in the evening and overnight.

Figure 22. Trips taken per day By Method By Time of day By Day of week (2014 Urban Sydney)



Calculated variable: For Monday to Thursday, the total number reporting that their last trip was on one of those days was divided by four to arrive at a number of most recent trips per day. For Friday and Saturday, the number reporting a last trip on those days was divided by two. Last trips on a Sunday were for a single day thus required no correction for number of days. NOTE: Treat with caution where n<50.

The method used to obtain the cab had more effect on waiting times than day of week or time of day. Particularly heavy demand is concentrated into Friday and Saturday evenings and especially overnight times. This pattern of demand was evident for all methods used to obtain a taxi. It is most marked for hailing a cab overnight and then in the evening. It appears that the supply of taxis to meet these periods of peak demand was sufficient in 2014 to prevent Friday and Saturday overnight and evening period from producing noticeably longer waiting times, although there was evidence that this pattern of demand had not been met with equal success in 2013.

5.13. 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 was 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 1,170 who were asked. Further breakdowns by origin, day of week and time of day are also shown.

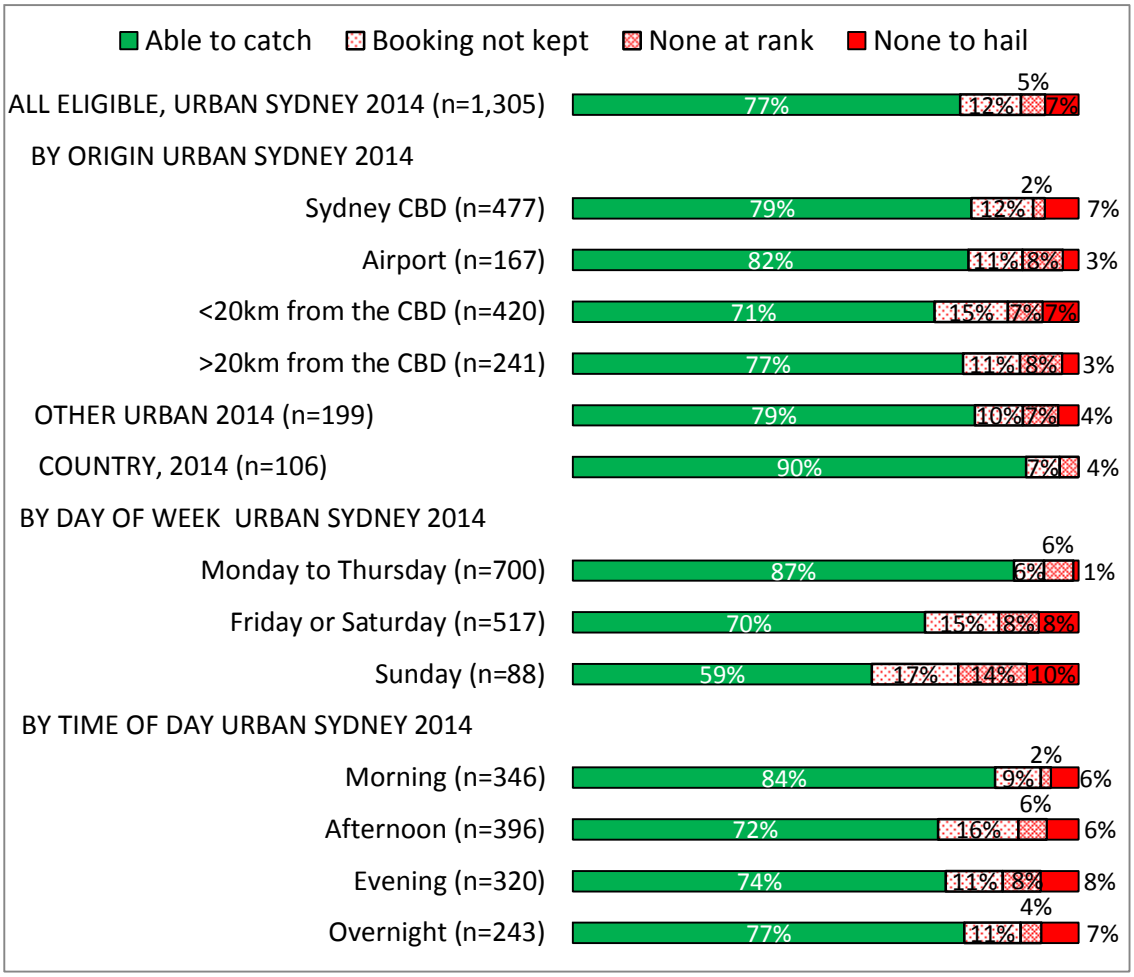
The majority of Urban Sydney taxi users had been able to get a taxi the last time they tried (76%), as had (79%) and an even higher proportion of Country users (90%). The reasons given for being unable to get one are a taxi not turning up as booked (7% in Urban Sydney, 4% in Other Urban and zero in Country locations)), being unable to find a taxi when trying to hail one from the street (12% in Urban Sydney, 10% in Other Urban and 7% in country locations), and not being able to find one at a taxi rank (5% in Urban Sydney, 7% in Other Urban and 4% in Country locations).

Although there were some apparent differences in being able to get a taxi by time of day, day of week and time of day, these were generally not large although statistically significant.

However, there is a highly significant difference for Urban Sydney taxi users by day of week, with getting a taxi when one was wanted being most common on Monday to Thursday (87%) and least common on Sunday (59%).

These results were very close to those obtained in 2013 indicating no change in overall taxi availability.

Figure 23. Being able to get a taxi when wanted one and reason for inability by origin, day and time, 2014



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 was tested by re-analysing the percentage that could not get a taxi for all combinations of time of day with day of week (see Figure 24).

The base numbers for Sunday were very small (Morning = 22, Afternoon = 20, Evening = 22 and Overnight = 9) so the results must be given little credence.

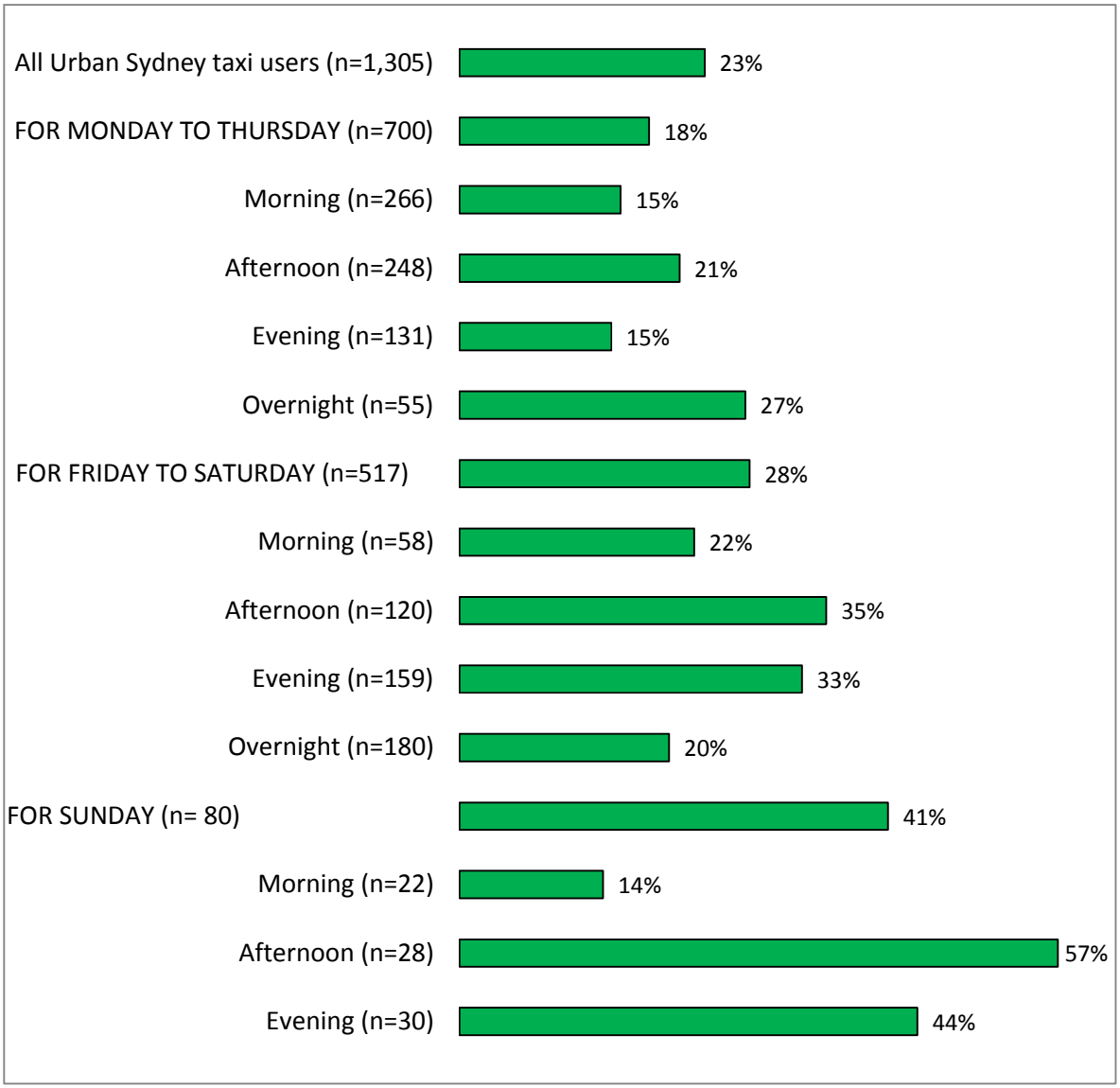
The morning period is associated with a lower incidence of being unable to get a taxi when one was wanted than in the afternoon or evening across methods and days of the week. Sunday was also associated with a higher incidence of being unable to get a taxi than the other days of the week.

In 2013, the probability of not being able to get a taxi overnight on Friday to Saturday was much greater than on Monday to Thursday. This pattern was reversed in 2014 (although the difference was not large), confirming that the supply of taxis overnight on Friday and Saturday was better able to meet demand in 2014 than it had been in 2013. However, there was still a considerably higher rate of being unable to get a taxi on a Friday or Saturday evening (33% of n=159) than on a Monday to Thursday evening (15% of n=131).

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, but not in the morning and not overnight. This was rather different to the pattern found in 2013, when incidence of not getting a taxi when one had been wanted appeared much higher overnight on Friday and Saturday than overnight on Monday to Thursday, and somewhat higher in the evening and afternoon on Friday and Saturday than on Monday to Thursday. In 2014, the markedly lower performance overnight on Friday and Saturday seen in 2013 (but from a very low base on only 39 cases overnight Monday to Thursday in 2013, n=55 in 2014) was not sustained; in fact the difference was reversed although much smaller in 2014. The greater difficulty in obtaining a taxi on Friday and Saturday in the evening and afternoon was evident in 2013 and 2014 and did not appear to have improved.

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.

Figure 24. Inability to get a taxi by Time and Day Urban Sydney 2014



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.

5.14. Reasons unable to take a taxi when tried

The respondents who reported in 2014, 2013 and 202 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 (n=254), and Other Urban (n=39) in 2014, in 2013 (n=209) and 2012 (n=162).

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 18 respondents form less than 1% of those who have taken a taxi in the past six months. This is a low prevalence for this particular problem.

The other difficulties appear about equally common and are also not widespread, but each has occurred to 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 and 19% of Urban Sydney taxi users in 2014. It was also reported by 20% of n=199 Other Urban taxi users in 2014, and by only 8% of n=106 of Country users in 2014.

Within Urban Sydney, while failure to turn up when booked was the reason given most often (34%), this was only slightly higher than being unable to hail a passing taxi (30%) or being unable to get a taxi at a taxi rank (23%). Those in the Other Urban areas were particularly likely to have been unable to get a taxi at a taxi rank (41%).

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

Failure to turn up was significantly less common for those starting from the CBD (21% of n=89 compared to 41% of the other 165 cases, $p<0.001$).

Very few reported not taking a taxi when at the airport (only n=6 Urban Sydney respondents).

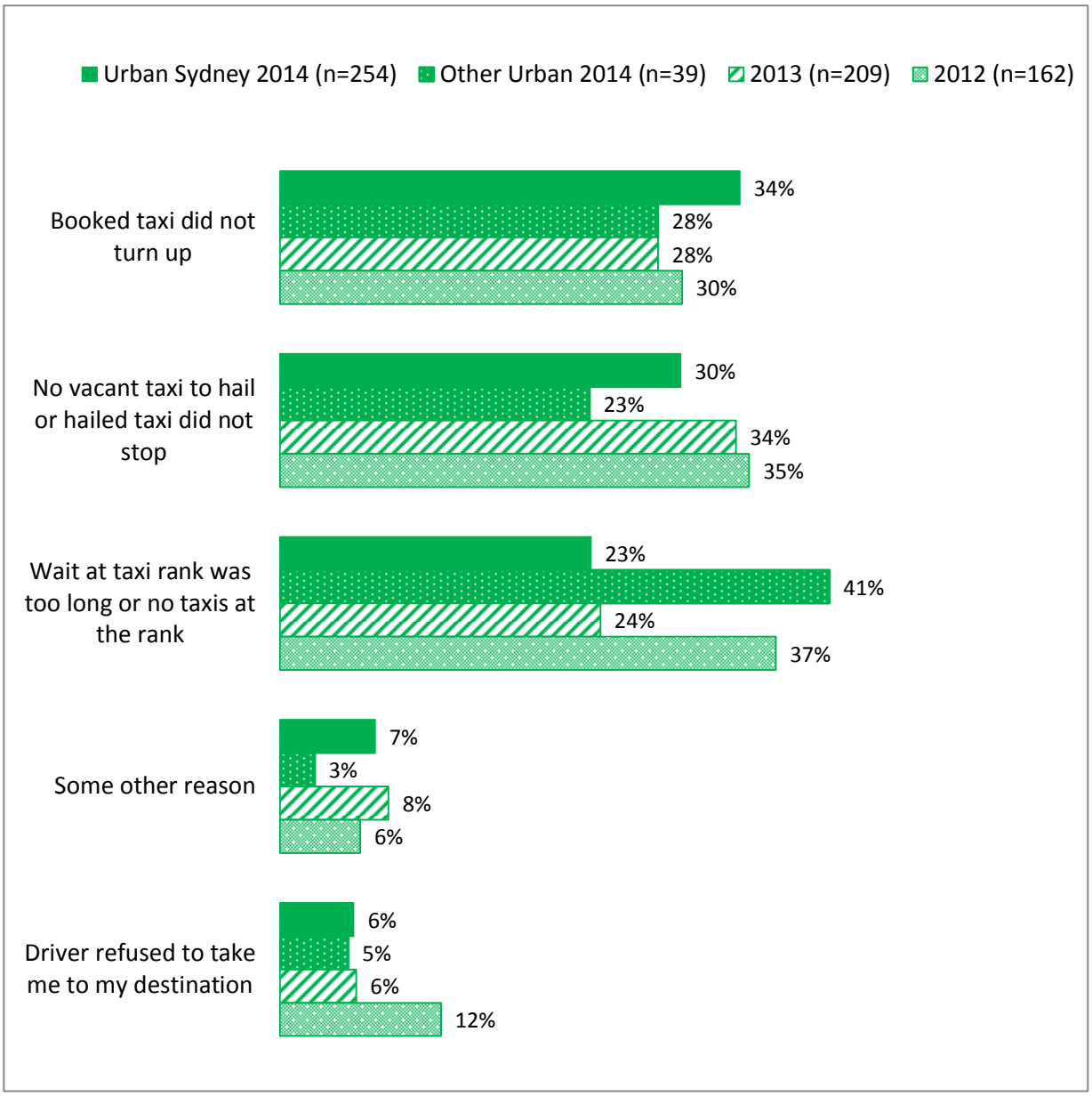
Failure to turn up was more common on Friday to Saturday (35% of n=118) than on Monday to Thursday (28% of n=115, $p=.07$); a similar difference in 2013 was statistically significant.

Being unable to find a taxi at a rank was more common in the morning (36% of n=55) than afternoon (16% of n=96).

There were only small and not significant differences in the pattern of replies given for Sydney residents in 2014 and 2013.

All these differences must be treated with caution, as we have re-grouped the data to maximise the observed differences. At best these differences might suggest hypotheses to be tested in further work with larger samples.

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]

5.15. 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.

Being too expensive was 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.

Comparisons to replies given in 2012 are limited by changes in the options offered. However, in all years, expense was the reasons selected by a substantial majority of respondents who had decided to do something else.

The results for Urban Sydney, Other Urban and Country locations in 2014 were quite similar, and there was no significant or substantial change in the Urban Sydney results in 2014 from the results from 2013.

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

5.16. Action taken instead of taking a taxi

A substantial segment in each 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 took the planned journey by another means, usually a bus and/or train or by driving. Some walked or cycled and a few decided to not take the journey at all.

In Urban Sydney, the alternative adopted was 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 were sufficiently large to merit comment. The analyses are based on the total 2014 sample across all locations, to give the maximum sample bases.

Walking or cycling was most often reported for journeys that would be under five kms (36%) and less often for longer journeys (17% for 5 to under 10 kms, and 4 to 7% for longer distance journeys).

Taking a bus was more common for journeys under 25 kms (26 to 36%) than longer journeys (18% for 25 to under 50 kms and 13% for journeys of 50kms or more).

Taking a train was more likely as the distance increased from under 5 kms (18%) to 50 or more kms (44%).

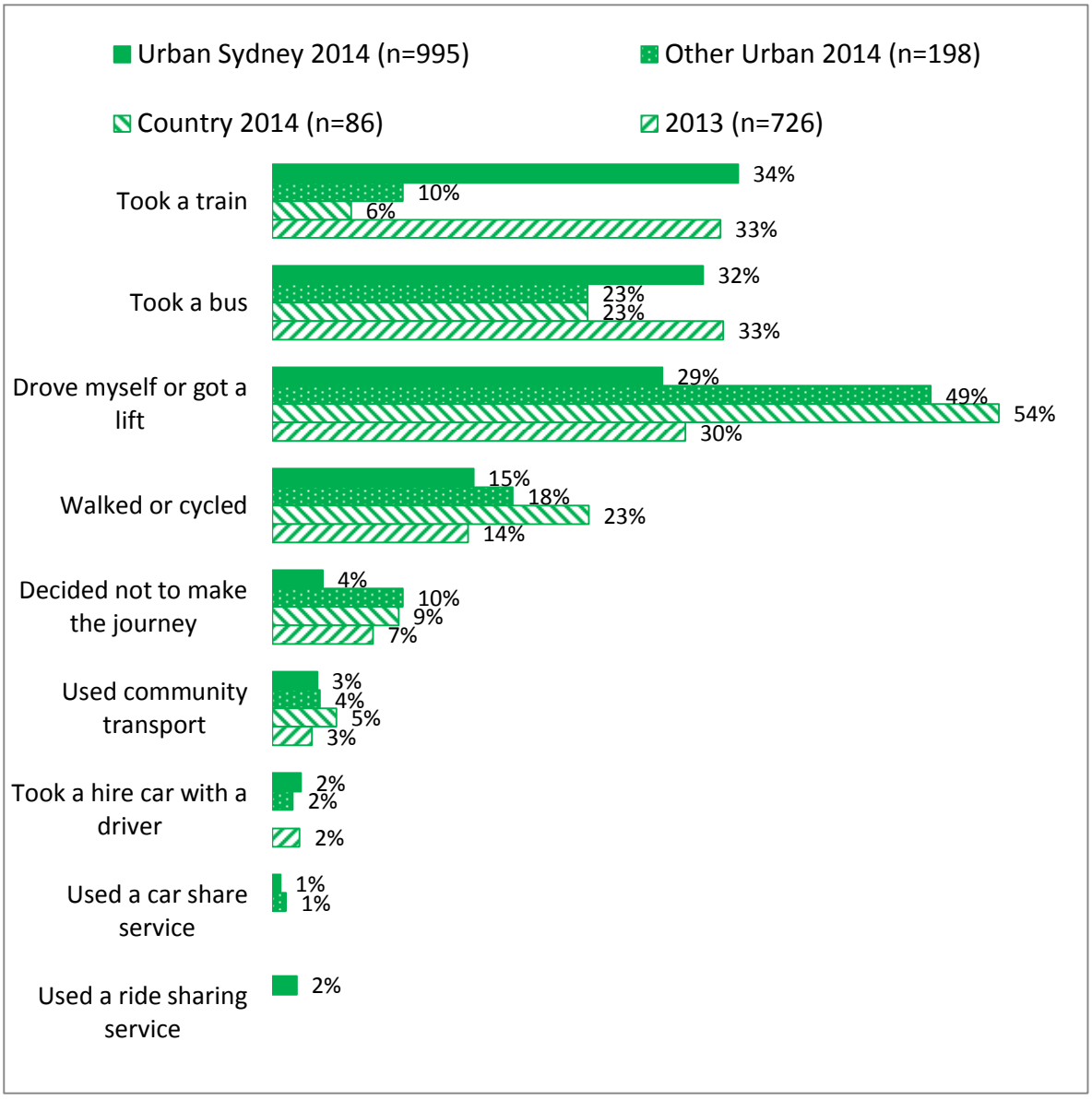
Driving oneself or getting a lift increased with the distance travelled from 23% to 44% as did using community transport (from 3% to 9%) and taking a hire car with driver (from 1% to 13%). Not making the journey at all varied from 6 to 8% for distances up to 50 km, but jumped to 17% for journeys of 50 kms or more.

Taking a train was more common on Sunday (48% of n=85) than other days (27%). Other differences by day of week were not large or significant.

There was little variation in what was done between different times of day of the journey.

There was very little difference in the replies from Urban Sydney users in 2014 and 2013. The large differences between Urban Sydney and other locations in 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

5.17. Problems experienced with taxi use

In 2014, 35% of Urban Sydney taxi users report having had one or more problems either during a taxi journey or when trying to catch one in the last 12 months. Only 27% of Other Urban users and 25% of Country taxi users reported 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 who gave an answer that fitted one of the prompted problems were recoded against that problem and treated as not having another problem. Additional codes were devised to capture the remaining verbatim replies. However, most of the additional problems were reported by less than 1% of the taxi users who reported a problem.

For all locations in 2014 (as was found in 2013) the most common problem reported is being unable to get a taxi when wanted.

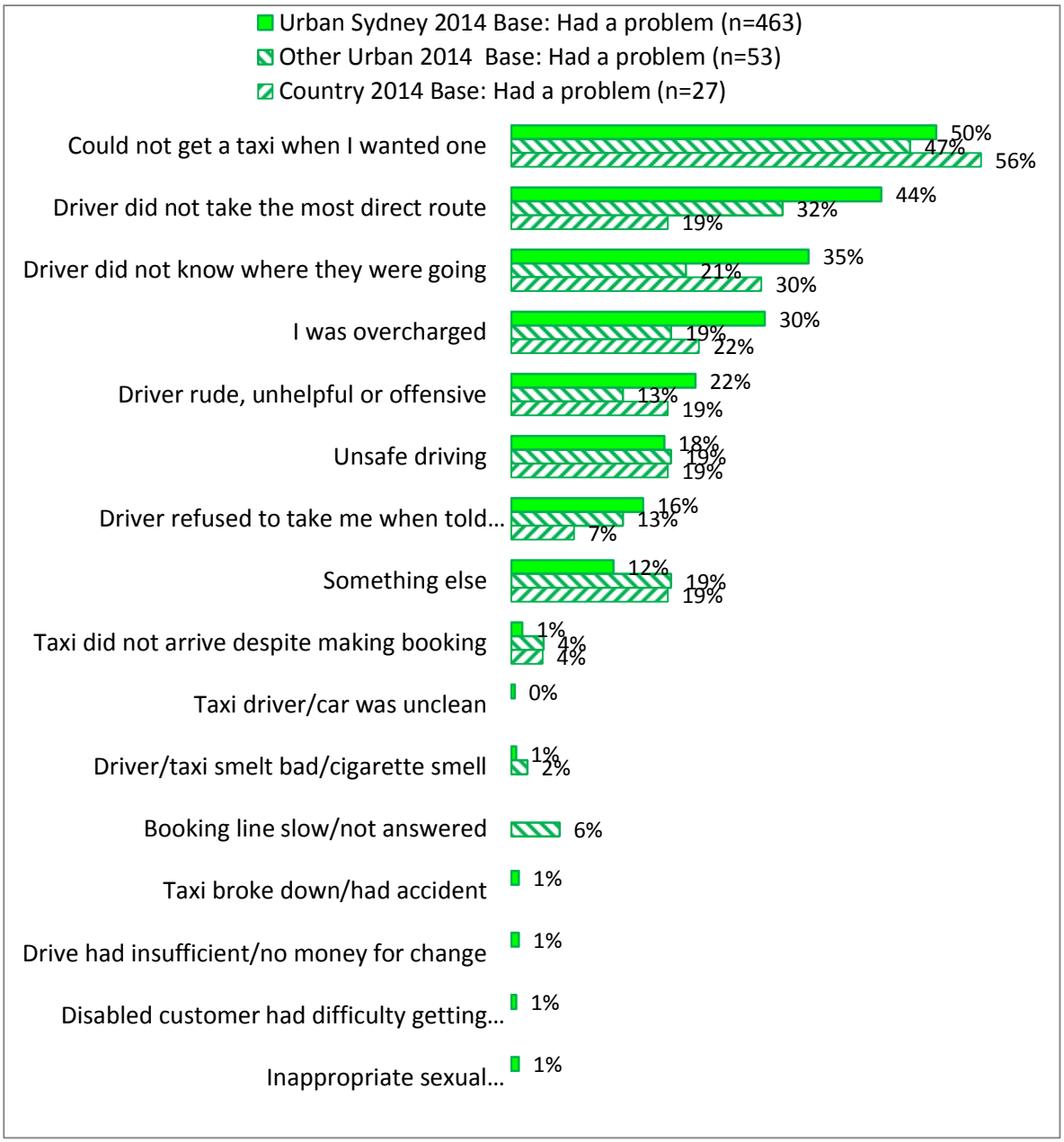
Other problems with driver behaviour or competence were endorsed by 6% to 17% of those who had taken a taxi in the past six months. Some additional problems with driver behaviour (some extremely serious) and a few with booking systems or the actual vehicle were each volunteered by under 2% of those with 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 were able to categorise it using the list of problems provided. Not arriving when booked was the most common problem volunteered. In the Other Urban locations, 6% of those with a problem (2% of all Country taxi users, but only three respondents) reported having difficulty getting through on the telephone booking number they had used.

The distribution of problem types for those with a problem in Urban Sydney in 2014 was very close to the distribution found in Sydney in 2013. The rank order of the percentage endorsing each problem was exactly the same in both years. The 35% of Urban Sydney taxi users in 2014 who reported having a problem was significantly below the 40% of 2013 taxi users with a problem ($p<0.02$).

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.

5.18. 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 were examined in the 2014 data.

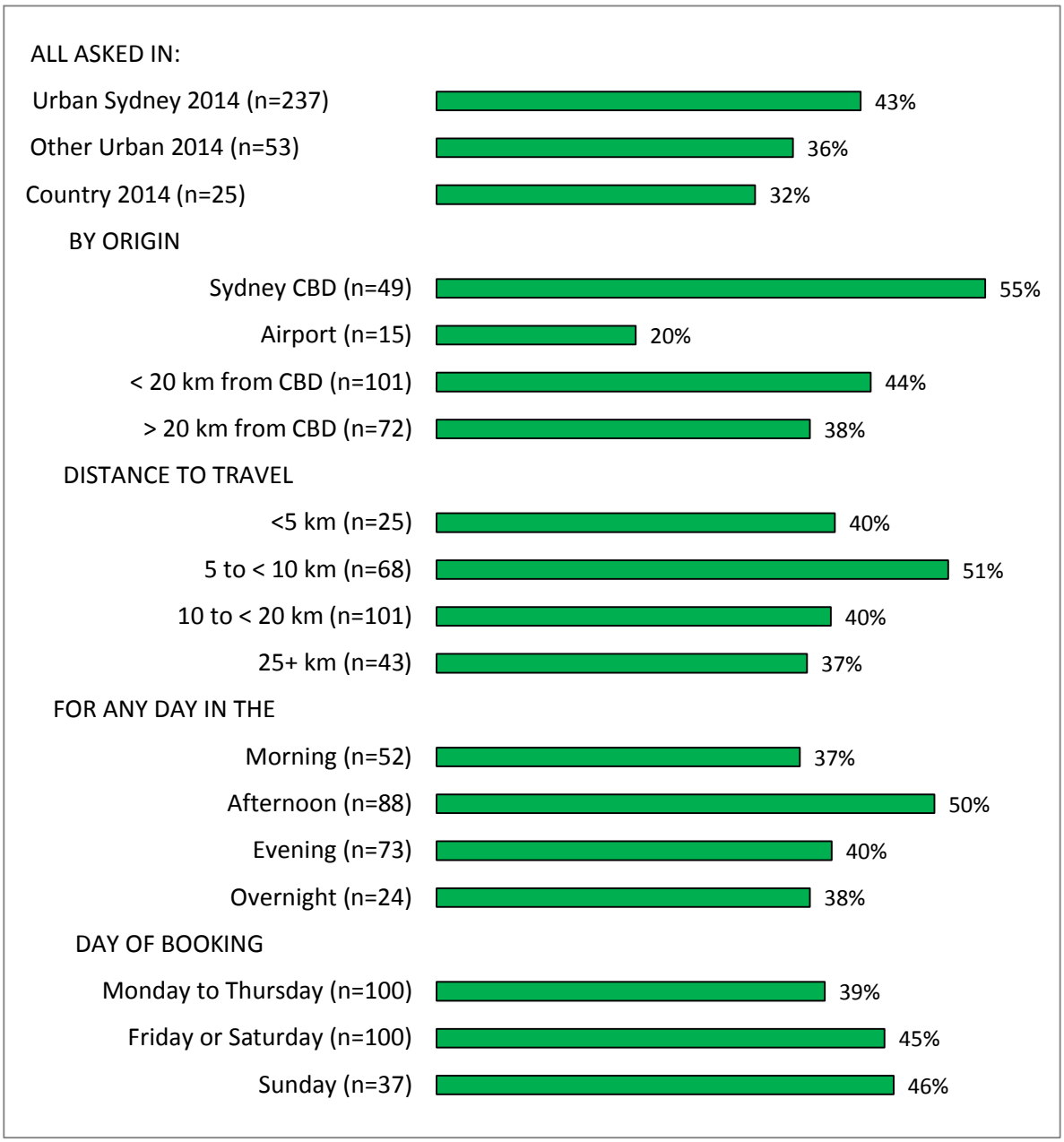
Call backs could be made because the taxi was not on time (when booked for a specific time) or did not come quickly enough (when the next available cab was booked). These are combined in Figure 29. The base numbers are restricted as the question was only asked if the taxi was late (booked for a time)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

The percentage reporting they had called back for delayed or late arrival varies somewhat with location (being most likely for those in Urban Sydney), journey origin, distance to be travelled and time of day. There was little effect by day of week. The most notable variation was the higher probability of calling back for journeys starting in the CBD. This might be due to these journeys more often being work-related.

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

There was also little evidence of change 9and no significant changes) between the results obtained in Urban Sydney in 2014 and in Sydney in 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.

5.19. Satisfaction with waiting time

All those who recalled taking a taxi journey in the previous six months 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 all those who had taken a taxi in 2014 are shown in Figure 30, with breakdowns by location, by whether the respondent was able to get a taxi and 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 were combined. For those who had booked for a specific time, "on time" and "less than 5 minutes" were combined. For all, "20 to less than 40 minutes" and "40 minutes or more" were 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 were at least slightly satisfied with the waiting time and just over half were satisfied or very satisfied.

Satisfaction with waiting time appeared lower in Urban Sydney (74% satisfied) and highest in the Country locations (88%) satisfied).

Where the respondent reported that the last time they had tried to catch a taxi they were unable to do so, satisfaction with the waiting time the last time they had caught a taxi was much lower (39% to 50%) than if they had been able to get a taxi the last time they tried to catch one (85%). 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 was some variation by the reason for being unable to get a taxi although users were more likely to be dissatisfied at all (61%) and very dissatisfied (16%) if they had booked a taxi that did not turn up. Being unable to get one on the street also produced dissatisfaction, but not quite as often or as strongly.

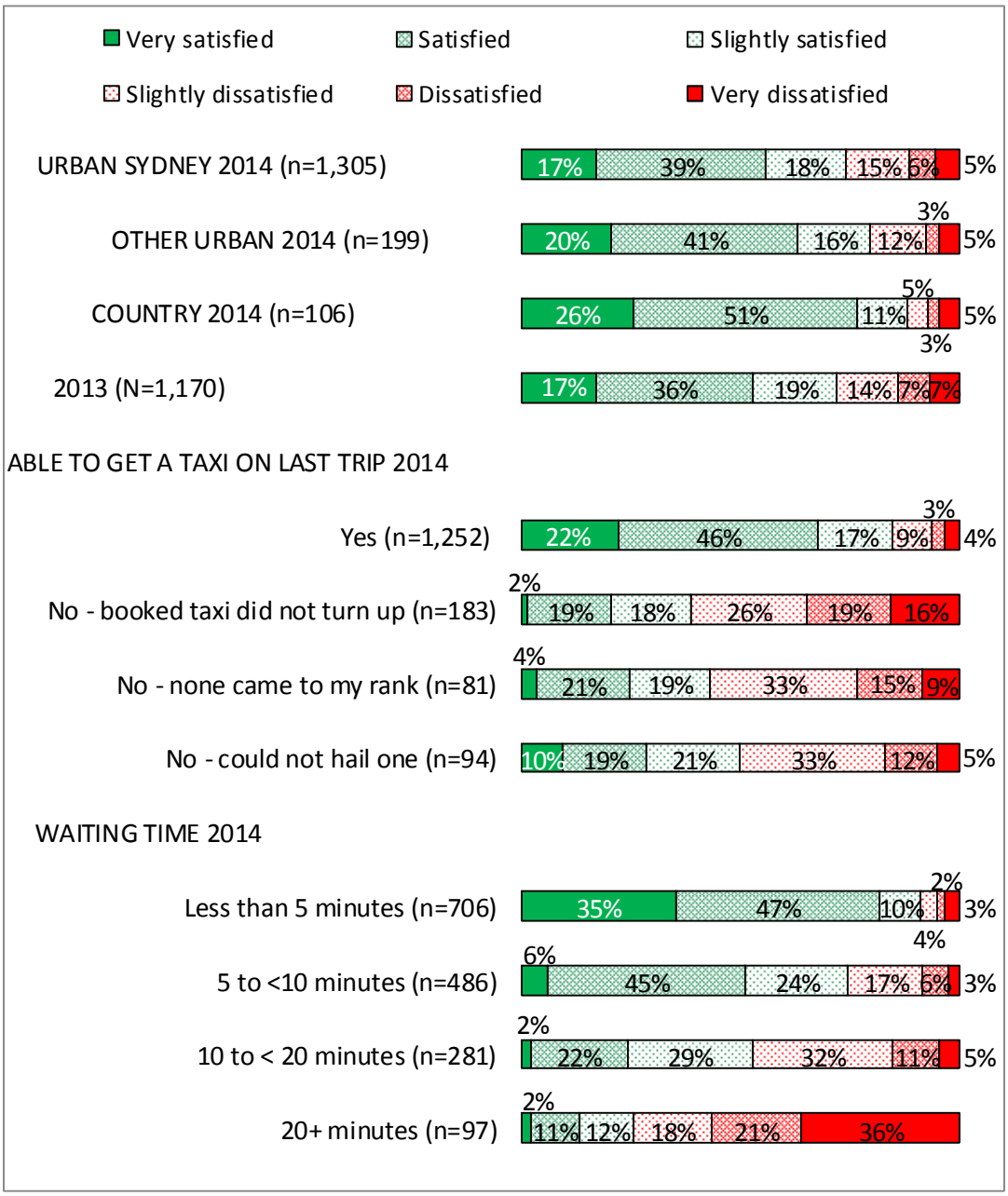
Satisfaction varied most with the reported waiting time. Being very satisfied is high for waits of under five minutes (35%), and falls to 2 to 6% for longer waiting times. Being satisfied or very satisfied is a very high 82% for waiting times under five minutes, 51% for five to under 10 minutes, 24% for 10 to under 20 minutes, and 13% for 20 minutes or more. Being very dissatisfied

was relatively common for waits of 20 minutes or more (36%) and very rare for waits of less than 20 minutes (3 to 5%). Being at least dissatisfied falls from 57% for those waiting 20 minutes or more to 16% if waiting 10 to under 20 minutes, 9% if waiting five to under 10 minutes and % 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 was little difference in overall satisfaction between Urban Sydney in 2014 and Sydney in 2013.

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

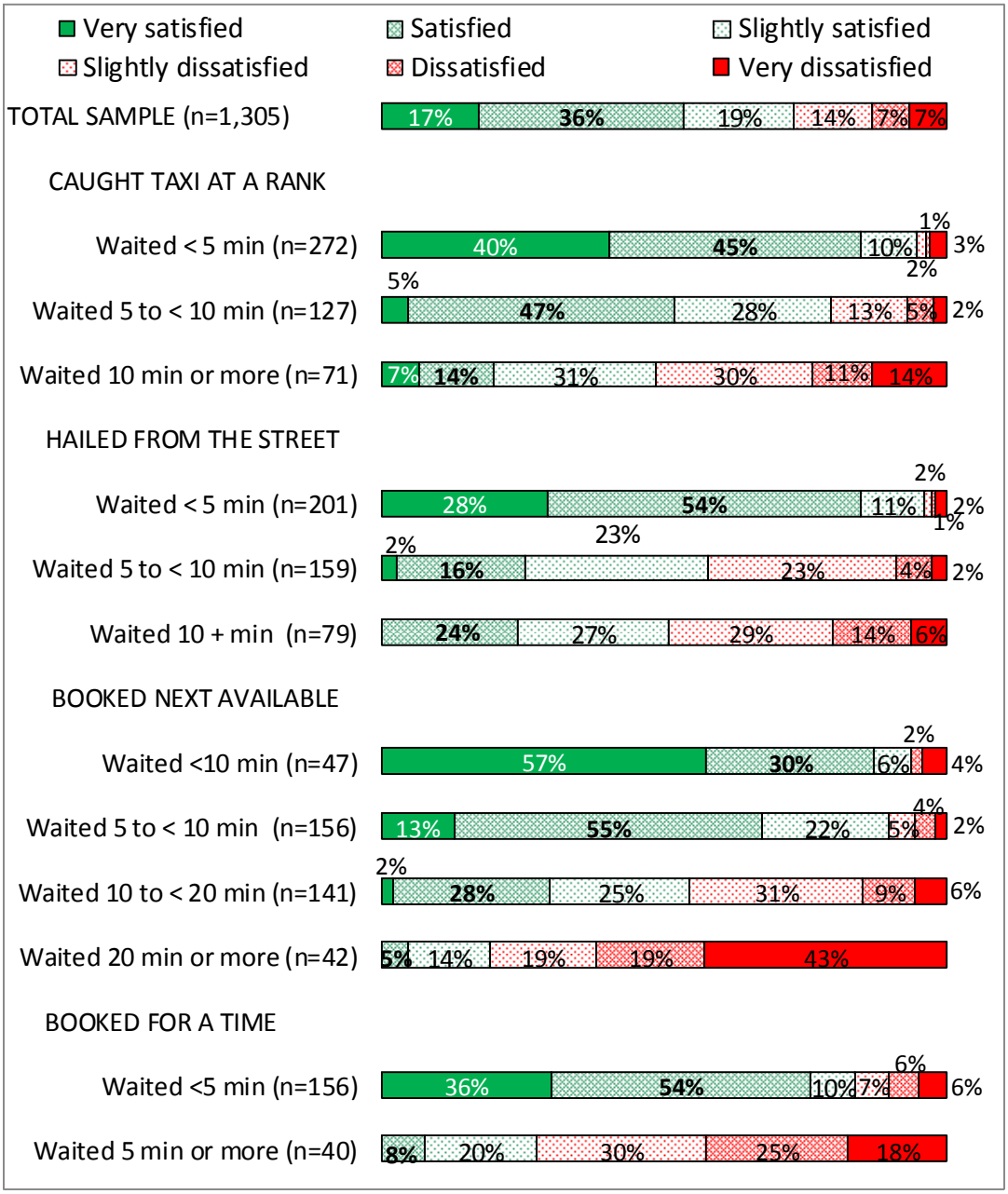


Q25. For the time I had to wait to catch this trip, I was ….

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 were combined with adjacent categories so that totals were at least n=20.

Figure 31. Satisfaction with waiting time by how obtained by waiting time 2014 Urban Sydney



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 46% 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 are about as likely to be dissatisfied with any wait that reaches five minutes or more as those obtaining a taxi by other means are if they had to 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.

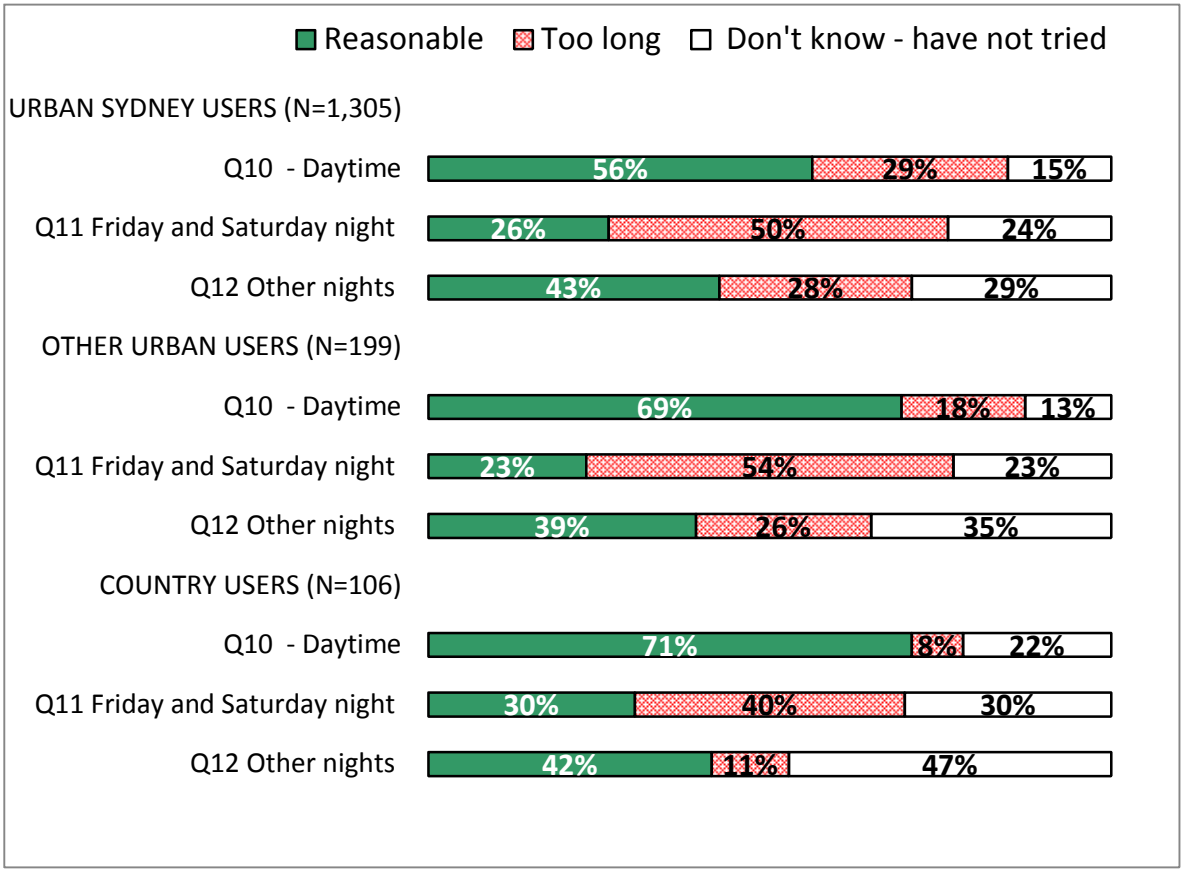
5.20. Whether waiting times reasonable

In 2013 and 2014 respondents were asked whether they considered the time taken to get a taxi at different combination of time of day and day of week was reasonable.

Figure 32 shows the distribution of replies.

Among those with relevant experience, waiting times on Friday and Saturday nights are more likely to be considered unreasonable than reasonable by a ratio of two to one except in Country locations where waiting times on Friday and Saturday nights are still more likely to be considered too long (40%) than reasonable (30%).

Figure 32. Whether waiting times considered reasonable, 2014



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. This fell to about one in four for Friday and Saturday night (30% of those with an

opinion) and to around 40% (but about 60% of those with an opinion in Sydney and Other Urban) for other nights. The exception was those in country towns. They were much more likely to not have an opinion than those in Urban locations, and those who had an opinion were generally more likely to consider waiting times reasonable.

The results for Urban Sydney were very similar to those found in 2013.

5.21. 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 2014 survey for Urban Sydney, Other Urban and Country locations.

The median fare in Urban Sydney was just under $30; in Other Urban locations between $20 and $30 and in Country locations under $20. In Urban Sydney, there were some fares over $100 and a few over $150. In Other Urban and country locations, fares did not exceed $100 and were rarely more than $40.

Fares were most likely to be paid in cash, with the majority doing so being larger outside Sydney than in Urban Sydney (see Figure 34). Credit cards were about twice as likely to be used in Urban Sydney (20%) as in the other locations (around 9%), but debit cards were equally used across all locations

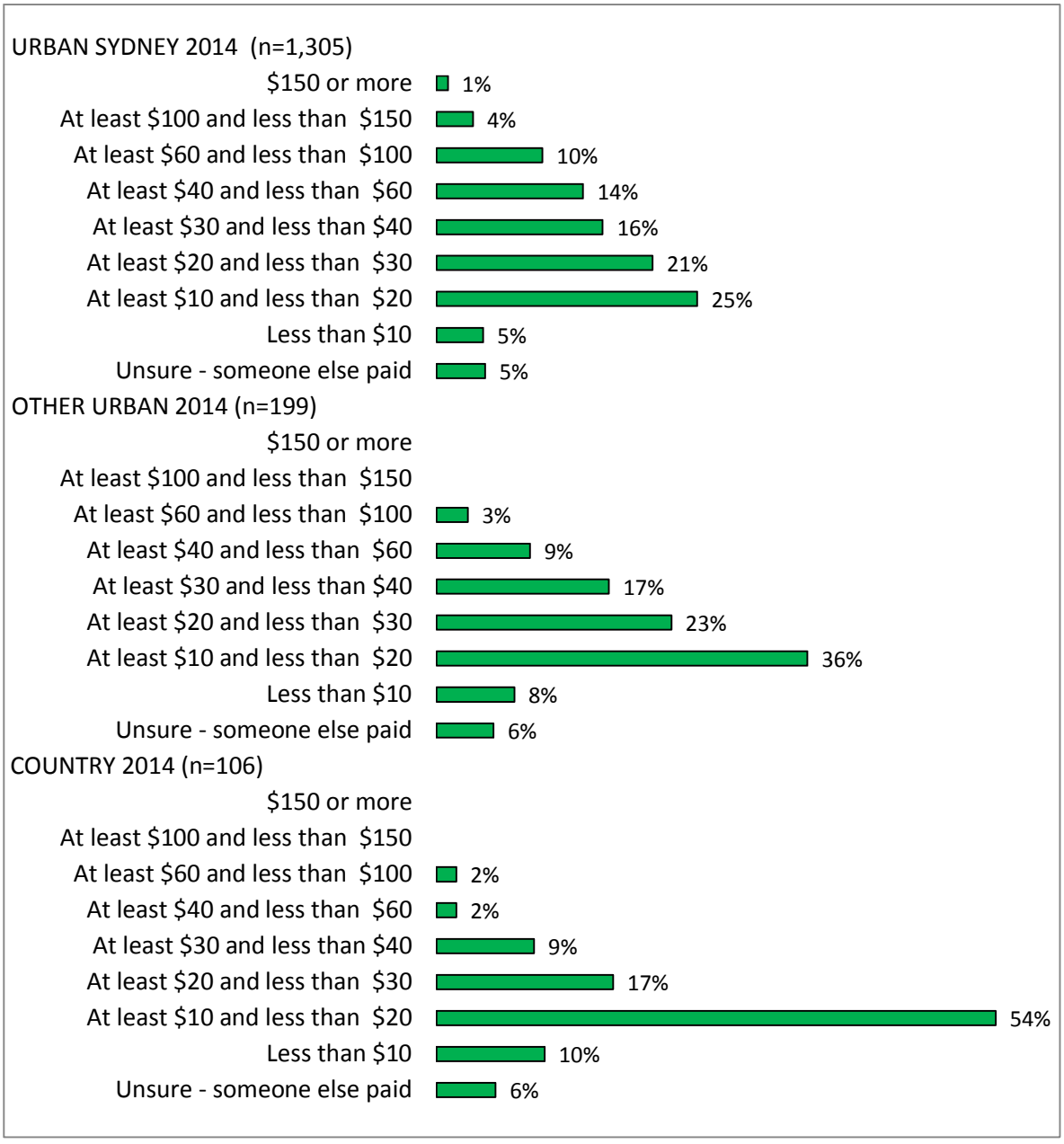
Cabcharge was more likely to be used in Urban Sydney than in the Other Urban or Country locations.

A few taxi users in Urban Sydney (2%) used a smart phone app to pay the fare. This payment method was not reported in the Other Urban and Country locations. Very few used some other means not listed.

Cash was more likely to be used for lower fares, and a card of some type was more likely to be used as the fare increased:

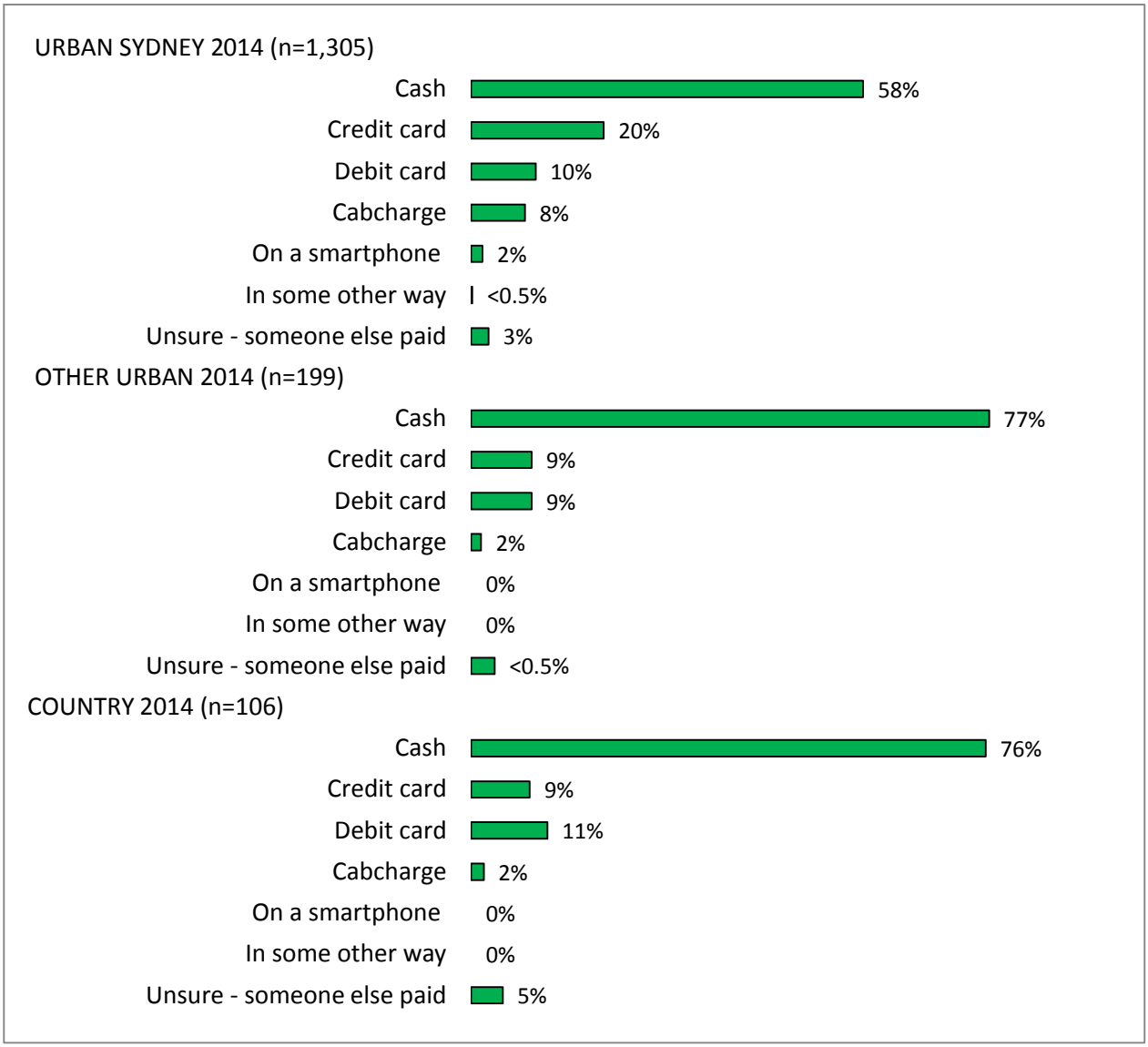
- 79% used cash and 18% a card for fares under $20 (n=541)
- 64% used cash and 35% used cash for fares of $20 to under $30 (n=334)
- 54% used cash and 44% a card for fares of $30 to under $60 (n=456)
- 41% used cash and 55% a card for fares of $60 or more (n=201)

Figure 33. Amount paid on last taxi trip by location, 2014



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

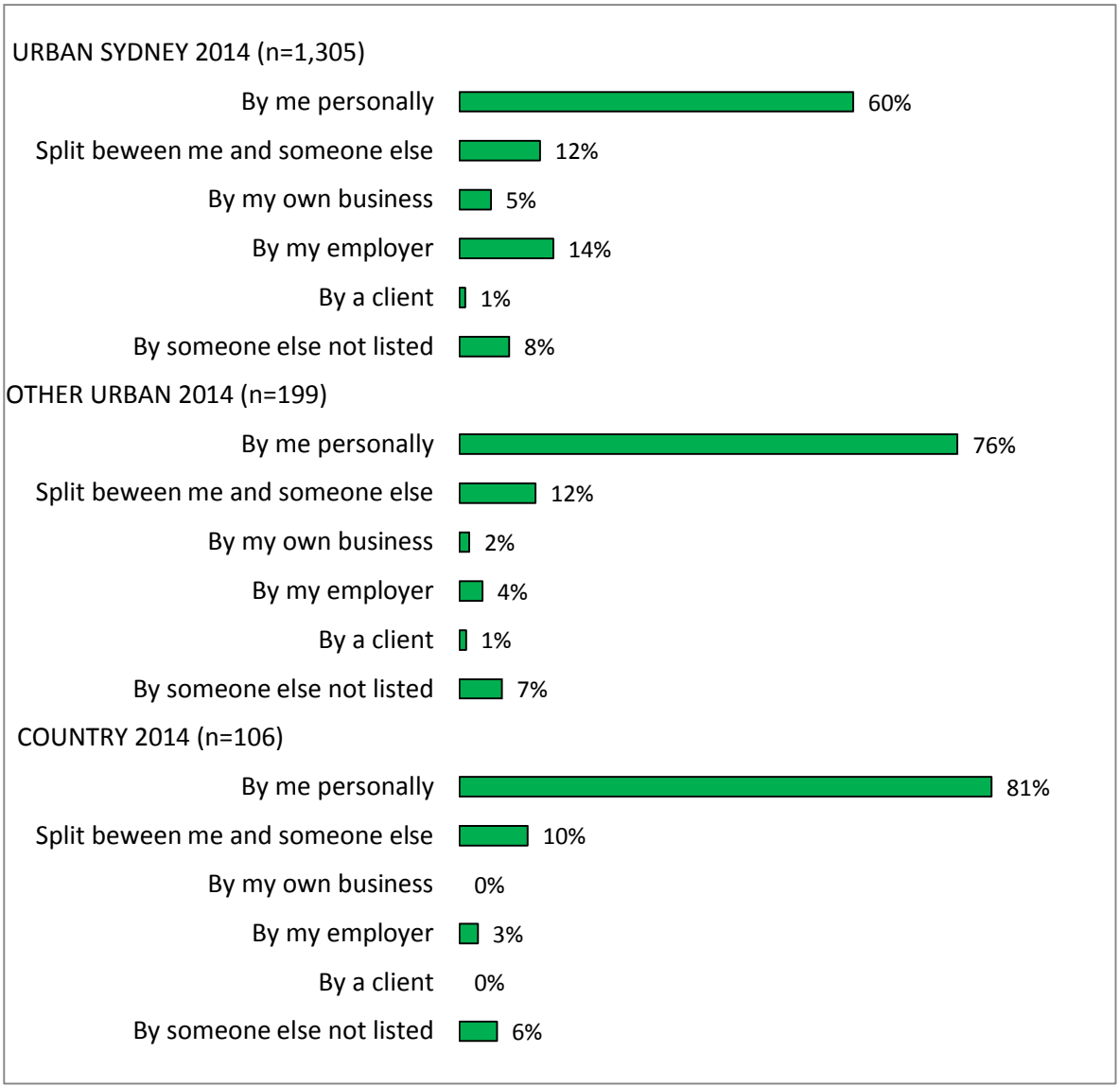
Figure 34. How fare paid on last taxi trip by location, 2014



Q27 The fare was paid by ….

Over half the respondents paid for their last trip themselves with this being even more likely in Country (81%) and Other Urban (76%) locations than in Urban Sydney (60%). While 14% were paid for by the employer and another 5% by the respondent's own business in Urban Sydney, these were much less common in Other Urban (4% and 2%) and Country (3% and none) locations; only 1% were paid by a client; 10 to 13% split the fare with someone else and a few fares (6 to 8%) were paid by someone else not listed (see Figure 35).

Figure 35. Who covered the fare on last taxi trip by location, 2014

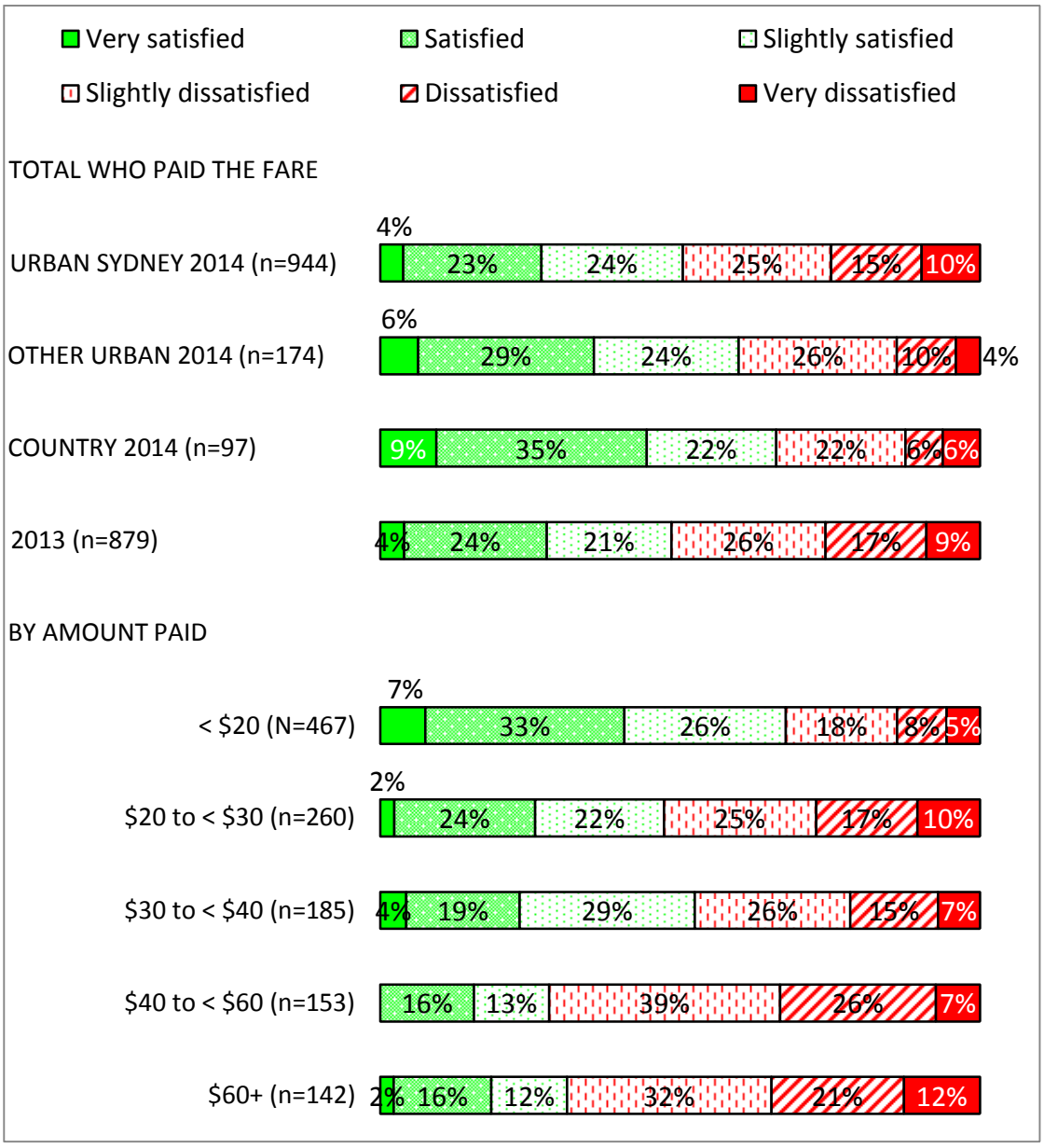


Q28 The cost of the trip was covered …

As Figure 36 shows, in Urban Sydney, satisfaction and dissatisfaction with the fare paid was about equally balanced (satisfied 50%; dissatisfied 50%) while small majorities were satisfied in the other two locations (60% in Other Urban and 56% in Country locations). Few gave extreme ratings with many choosing one of the two middle replies.

There was a steady fall in the percentage very satisfied or satisfied with the fare as the amount paid increased up to fares of $40 or more with little change above that point. However, there was no clear or consistent pattern in the percentage giving other ratings.

Figure 36. Satisfaction with fare paid by amount paid

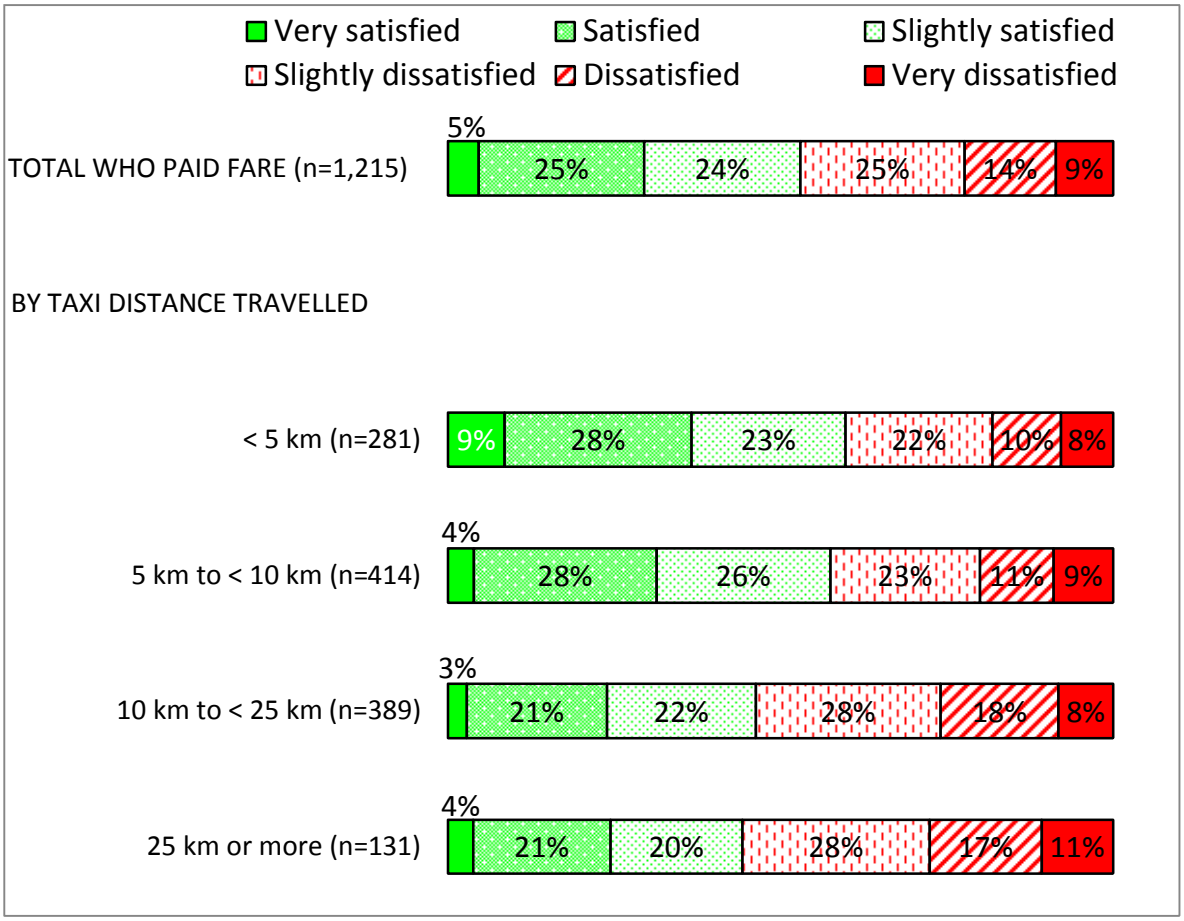


Q29. For the amount I paid for this trip, I was ….

When data from all locations in 2014 were combined to maximise the sample sizes, being dissatisfied or very dissatisfied with the fare paid was 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 was not large, with 59% satisfied with the fare on journeys under 10 kms and 46% for longer journeys.

There was little difference in the distribution of satisfaction with the fare paid between Urban Sydney 2014 and Sydney in 2013.

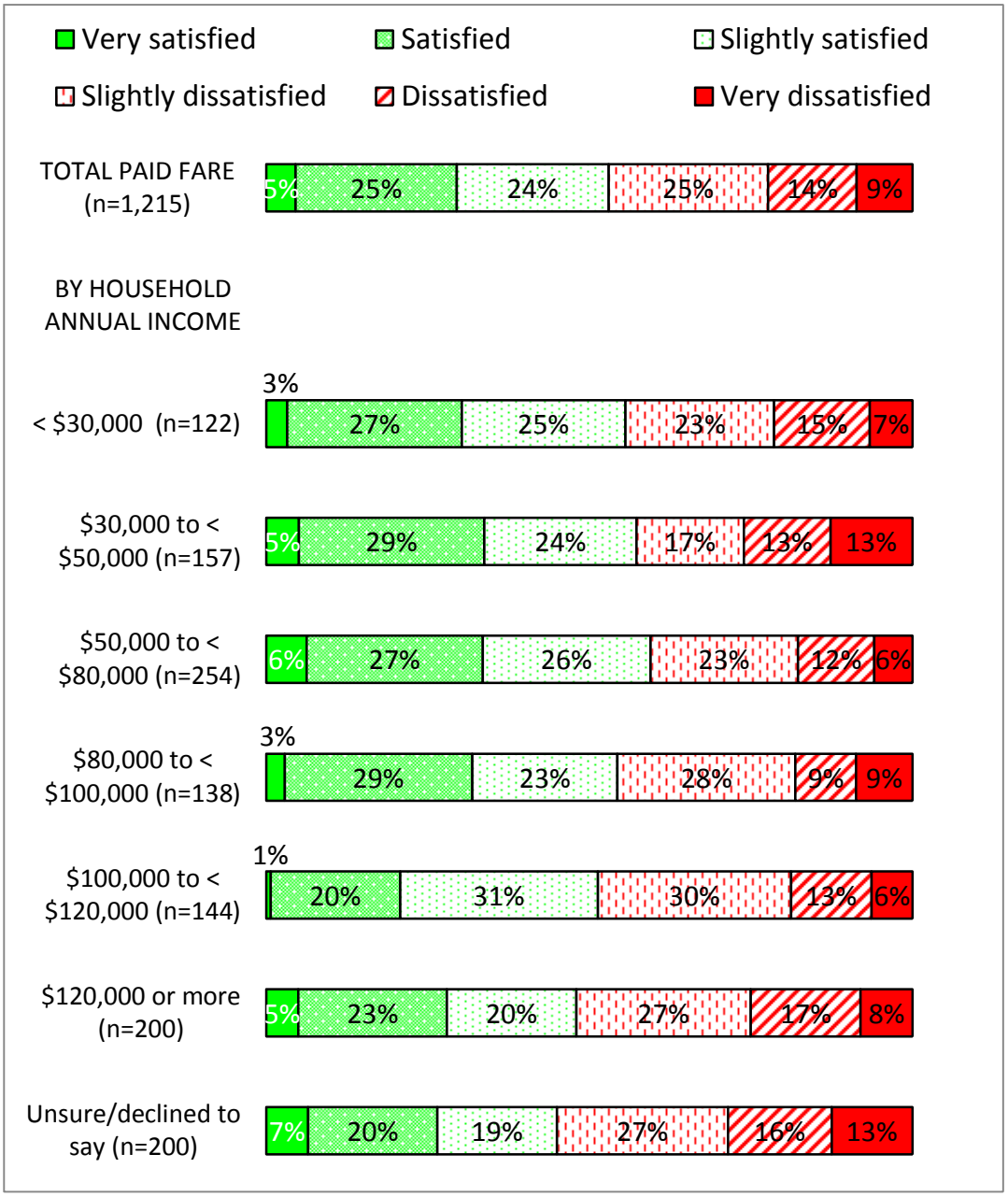
Figure 37. Satisfaction with fare paid by distance travelled, 2014



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 used the Sydney Harbour Bridge or Sydney Harbour Tunnel have to pay the toll in addition to the fare, so this might impact on the level of satisfaction.

Differences in satisfaction with the fare paid among those who had paid the fare themselves did not differ significantly between the n=249 who had crossed the harbour using the bridge or tunnel and the n=695 who had not crossed and so were not subject to the toll for crossing the harbour.

The percentage satisfied or very satisfied with the fare paid was 23% of those who had crossed the harbour using the bridge or tunnel compared to 28% of those who had not. Being dissatisfied or very dissatisfied was reported by 25% of those who had made the crossing and 25% of those who had not.

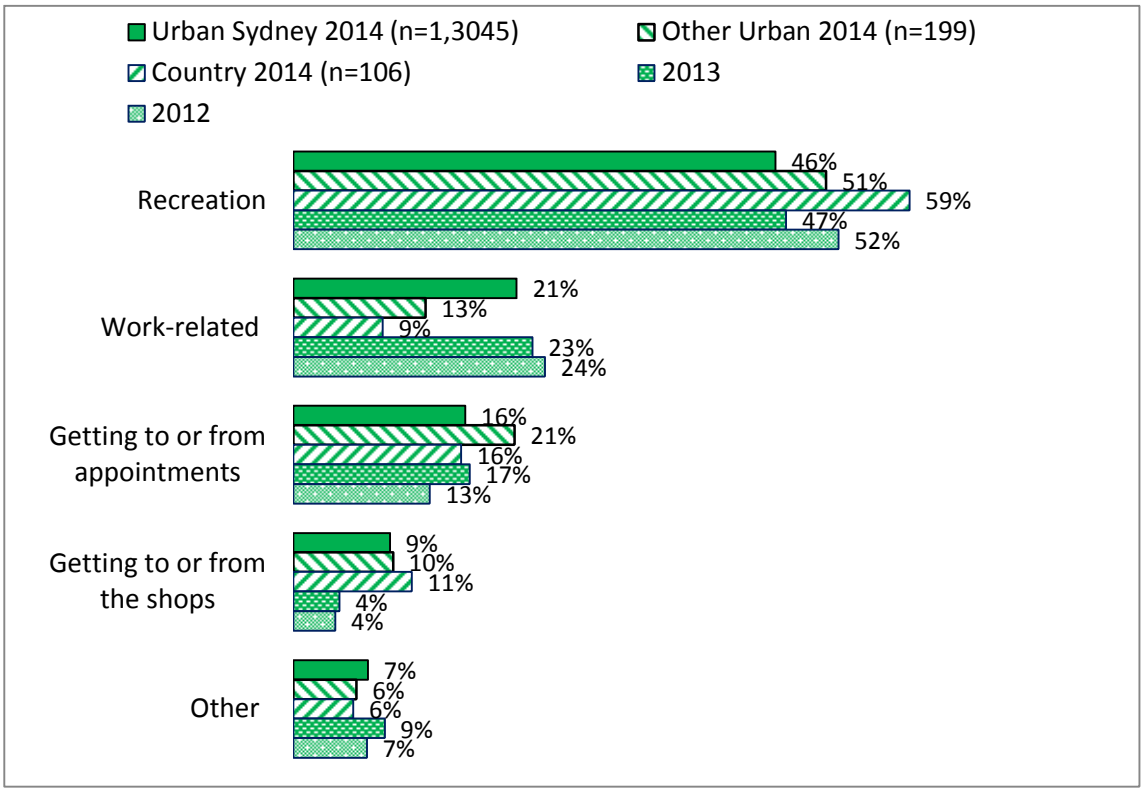
5.22. Purpose of trip

When asked about the purpose of the trip, recreation was the most often chosen of the prompted options offered in all years and in all 2014 locations (see Figure 39). It was slightly higher in Country locations than in Urban Sydney in 2014.

Work related came next (almost unchanged for Urban Sydney, but lower in Other Urban and Country locations), with getting to and from (personal) appointments accounting for some (slightly increased), and shopping trips for a few.

Trips taken for work or business in 2014 were more likely than others to be paid for by the business (53%), followed by getting to and from (perhaps work related) appointments (15%) and shopping (26%). Only 1 to 3% of trips for other purposes were paid for by the employer or the respondent's own business. Trips for socialising were the most likely to be split with someone else (20% compared to 3 to 10% of trips for other purposes).

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)

5.23. 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.

Taxi use was most often attributed to convenience in all locations in both 2014 and 2013. Second in the Urban Sydney 2014 and 2013 samples was a taxi being a quicker or more direct way to reach the destination. In the 2014 Other Urban and Country locations, being the only available option (described as "last resort" in Figure 40) was the second most endorsed reason ahead of being quicker or more direct. Very few said it was cheaper than other options (0 to 5%). A small group (8% in all segments) had some other main reason not listed.

There are some differences in the reasons given by frequency of use. Those using more than five times a week were much more likely to endorse being quicker or more direct (49% of n=67 compared to 22 to 36% of other 2014 users) while those using less often were more likely to give convenience as their reasons for use (37 to 42% compared to 28% of the 67 very heavy users). This is quite different to the pattern found in 2013.

Lack of access to other means of transport was consistently more likely to be selected by those living in Other Urban or Country locations wherever they boarded the taxi (35% of n=169) and least often by those boarding in the Sydney CBD (17% of n=523). For those in Urban Sydney, lack of other options increased with distance from the CBD (21% of n=495 boarding less than 20 kms and 29% of n=254 boarding more than 20 kms from the CBD, and 20% for n=169 boarding at the airport). Being quicker or more direct declined with distance from the CBD in Urban Sydney (37% of n=523 boarding in the CBD, 25% of n=495 within 26 kms, 19% of n=254 more than 20 kms, 21% if at the airport), and was consistently lower in Other Urban and Country locations (17% of n=169).

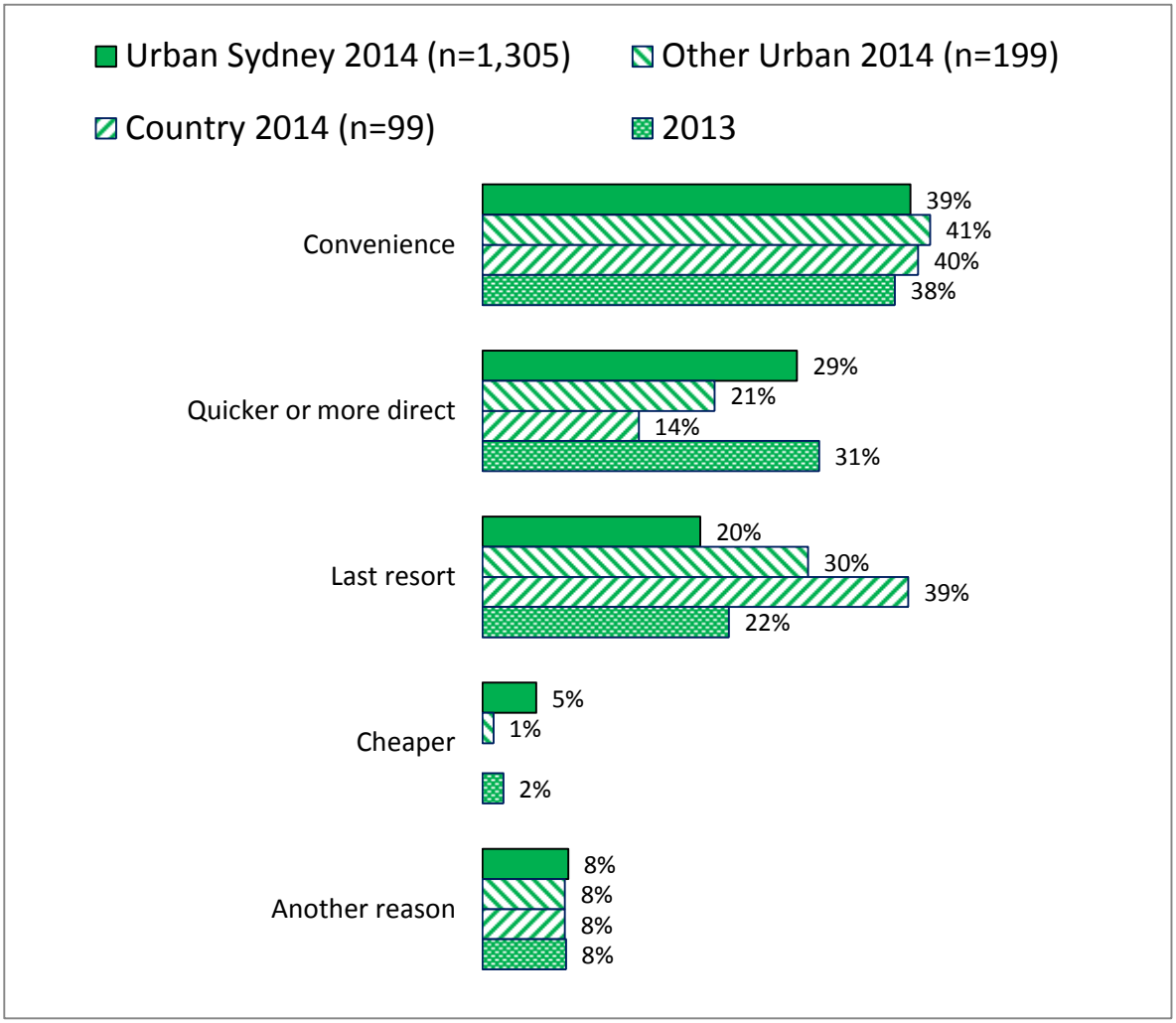
Being quicker or more direct was significantly more often cited as a reason for taking a taxi by 34% of n=348 travelling less than 5 kms and less often by those travelling longer distances (22 to 26%) but the effect was not large.

Those travelling on a Friday, Saturday or Sunday were less likely to give being quicker or more direct as their reason (22% of n=758). Those travelling on a Sunday were significantly more likely to give being cheaper as their reasons (17% of n=100

compared to 6% of n=658 travelling on a Friday or Saturday and only 1% of n=852 traveling on Monday to Thursday).

Use of a taxi on trips commenced overnight was significantly more likely to be explained as due to lack of other options (34% of n=106) than trips started at other times (all 18% to 22%). Those taking a taxi overnight were also less likely than those travelling in the morning to give being quicker or more direct as a reason (19% of n=316 compared to 34% of n=423) with those travelling at other times being in between (25 to 27%).

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

5.24. Crossing the harbour

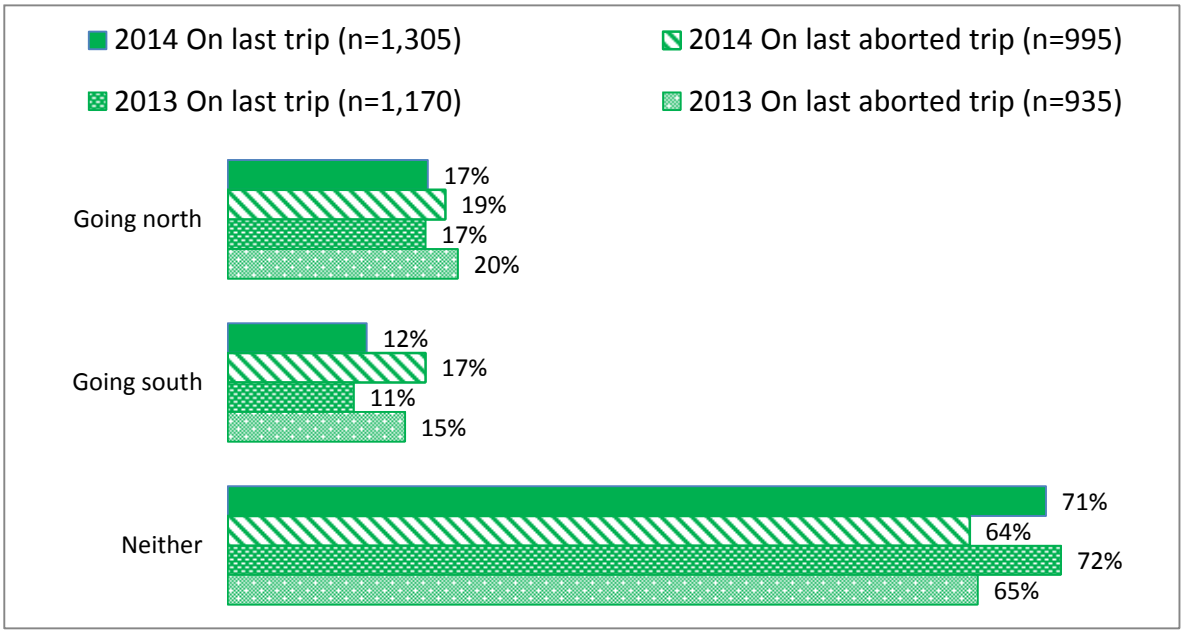
Sydney respondents in 2014 and in 2013 were asked whether they had (or would have) crossed Sydney Harbour going north or going south using the Sydney Harbour Bridge (SHB)or Sydney Harbour Tunnel (SHT) on:

- 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 were somewhat more likely to be going north than south by 2 to 5 percentage points.

Figure 41. Using the SHB or SHT on last and last intended taxi journey, 2014 and 2013



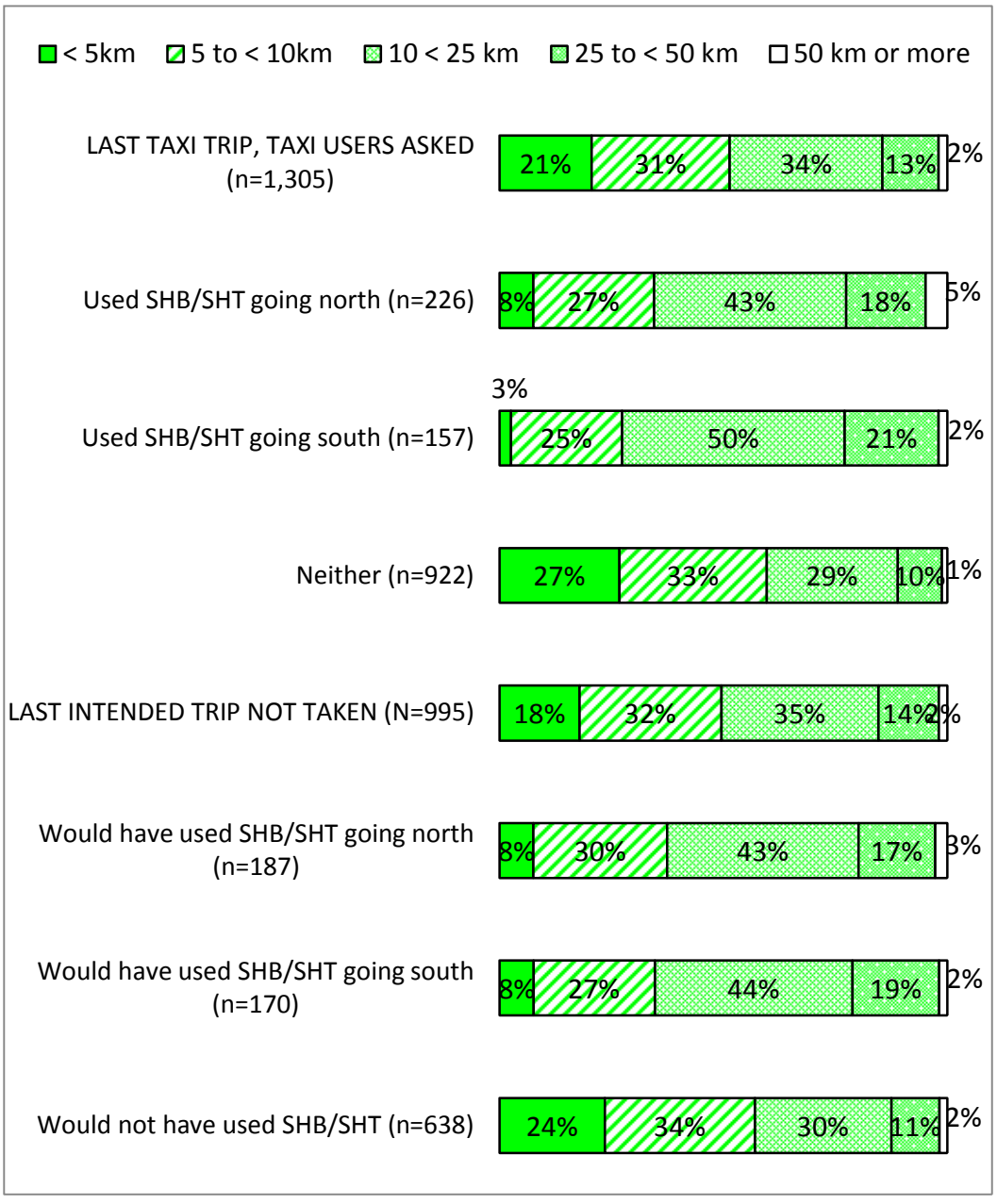
Q15b Did you cross/ Q34aWould you have crossed the harbour using the Sydney Harbour Bridge or Sydney… Base: Q15b All who have taken a taxi in the last six months
Base: Q34a: All who had considered taking a taxi and in the end did not

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 taken by taxi and trips that might have used a taxi but did not that did use or would have used the SHB or SHT in either

direction are significantly longer than those that do not cross the harbour. There was 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 2014



Q

15b 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

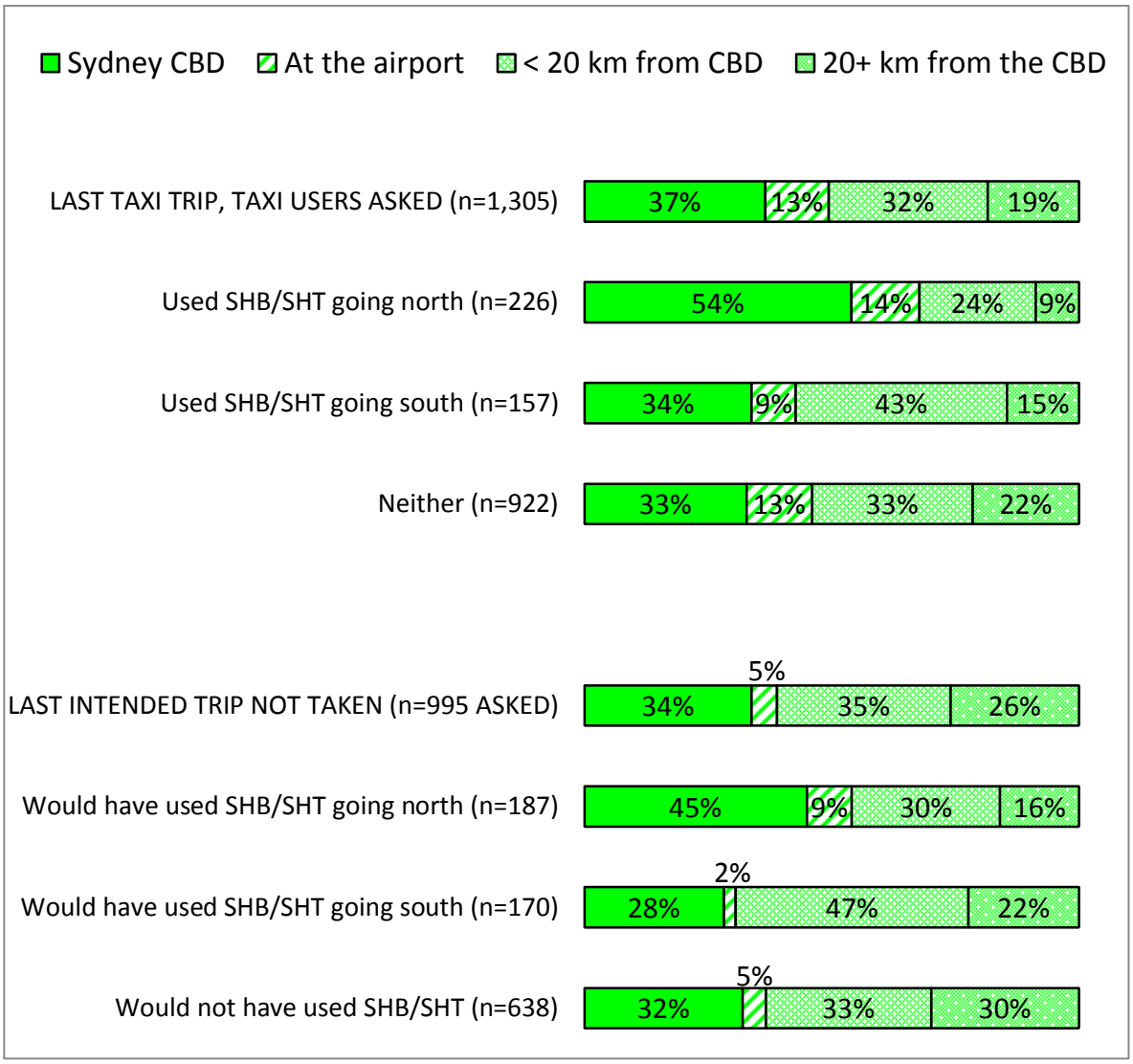
Base: Q34a: All who had considered taking a taxi and in the end did not and were asked Q34a

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 was 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.

However, some 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 but 9% of those saying their last taxi journey used the SHB or SHT going south said the journey started at the airport; 2% 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 2014 the number of such infeasible replies were not large – 14 for journeys actually taken and only four for journeys that were not taken

Journeys that used or would have used the SHB or SHT travelling north or travelling south were more likely to have started less than 20 kms from the CBD than to have started more than 20 kms from the CBD. These origins were much closer to being equally common for trips that did not cross the harbour using the SHB or SHT.

Figure 43. Origin by use of SHB/SHT Urban Sydney 2014



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:

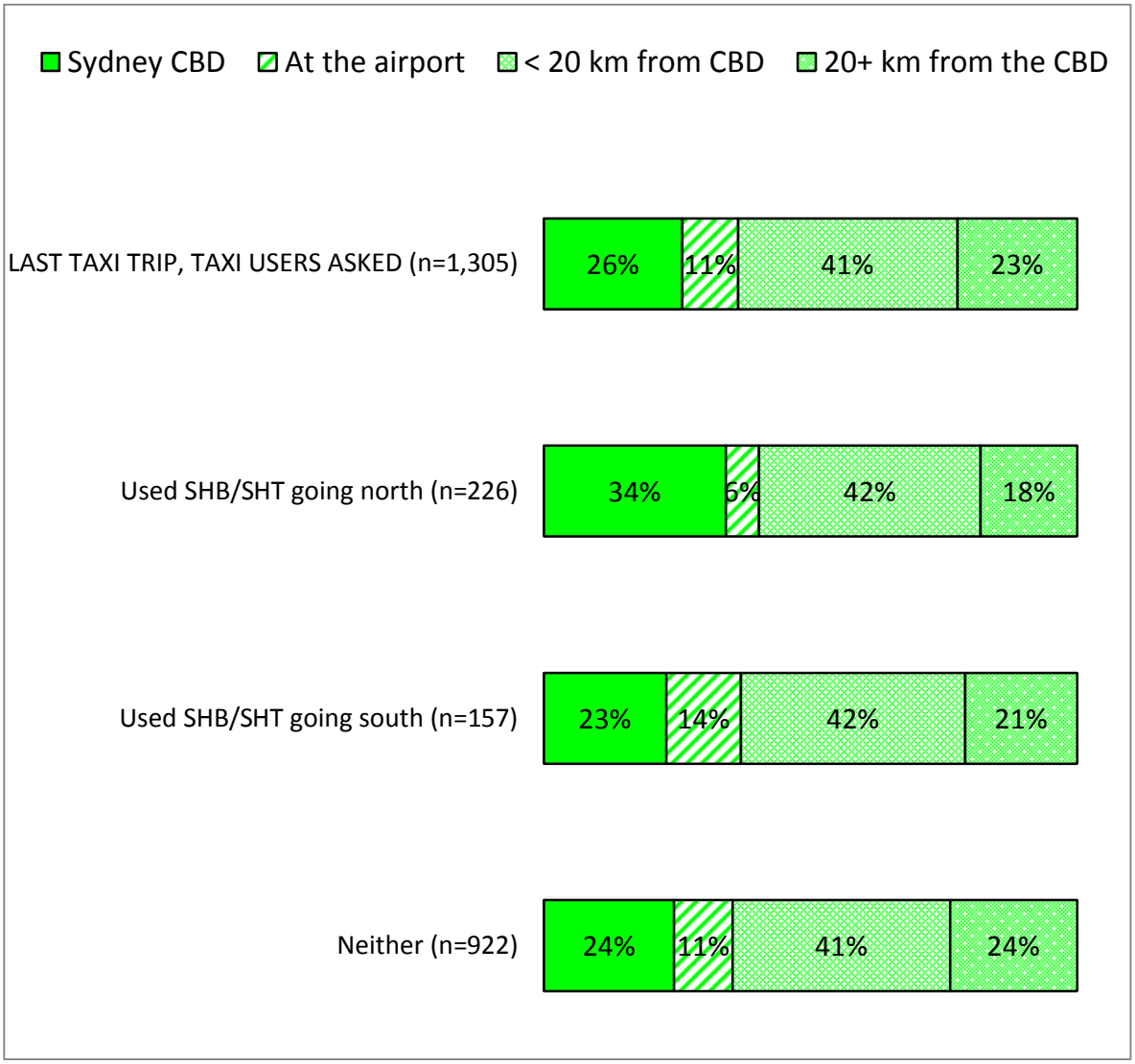
- 14 taxi users reported they had travelled north through the SHB or SHT to the airport as these harbour crossings are north of the airport

- ✧ 36 respondents reported they had travelled south across the harbour with a journey starting in the Sydney CBD

These respondents might have started their journey in the North Sydney CBD and considered this part of the Sydney CBD.

There were only small differences in the destination of journeys that used the SHB or SHT to cross the harbour going north, going south or did not make such harbour crossings.

Figure 44. Destination by use of SHB/SHT Urban Sydney 2014



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 three years:

- 23% would not take any of the combinations offered in 2014 (little changed from 27% in 2013 , both up from 15% in 2012)
- 10% would take only the shortest, cheapest trip (close to the results for 2013 and 2012)
- Very few would be willing to take a trip of 50 km or more if this cost more than $120, and only 9% would take a trip of 30 km or more for $75 or more (very similar to the 2013 and 2012 results)
- 22% would be willing to take a trip of 20km or more for $48 or more (little changed from 20% in 2013 and somewhat lower than the 27% found in 2012)
- 43% would be willing to at least go 15 km for $38 (44% in 2013 and 51% in 2012) while 57% (56% in 2013 and 48% in 2012) would not be willing to take a trip that long at these prices

Thus the 2014 and 2013 Sydney samples were 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 2014, those outside Sydney were more price sensitive than those in Urban Sydney. Specifically, those in Other Urban and Country locations were more likely than those in Urban Sydney to say they would not take any of the trips at the prices offered, and were significantly less willing to take trips of 20 kms or more. Those in the Country locations were significantly less willing to take trips of 15 kms or more at the stated prices.

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 were 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.

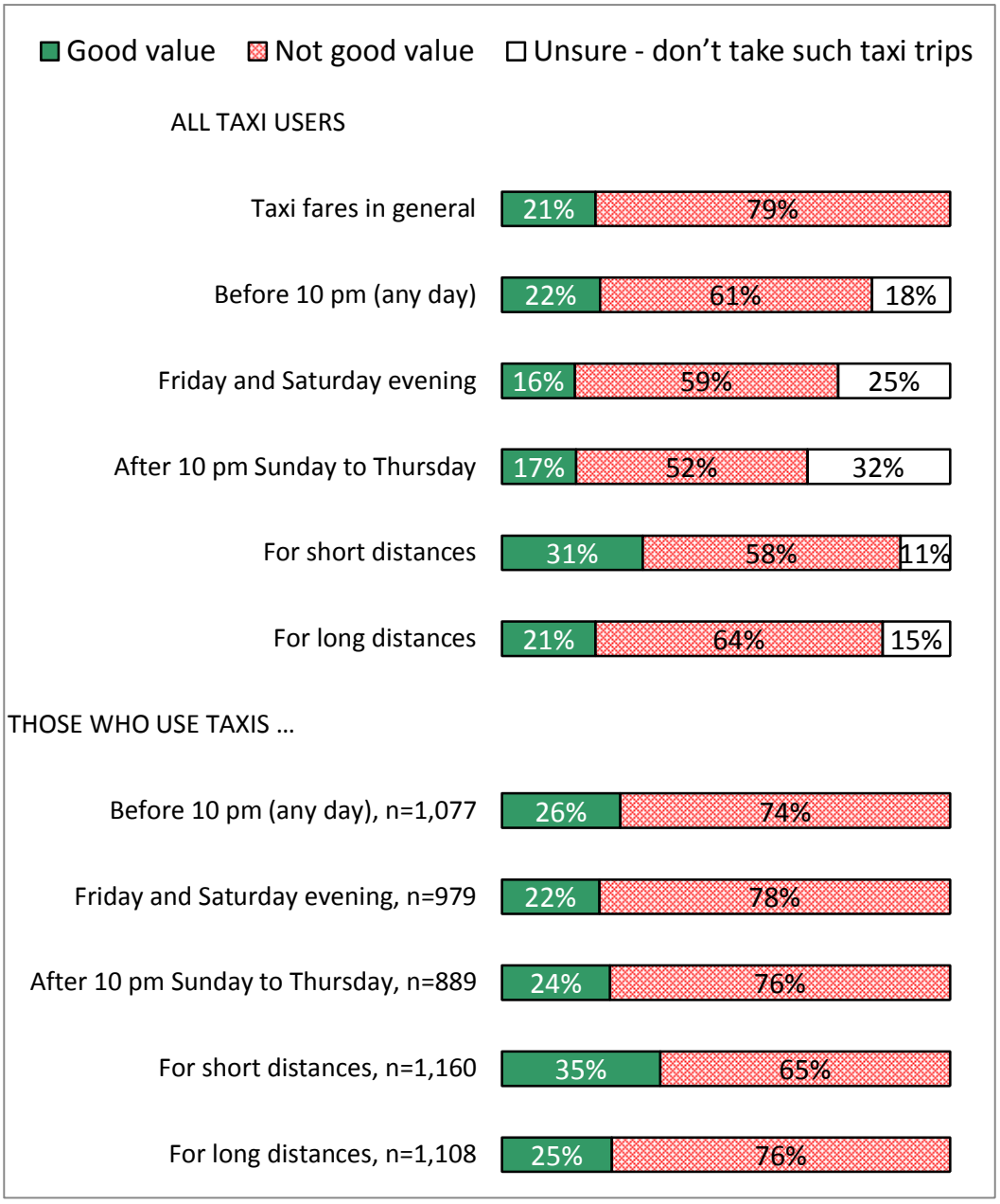
As in 2013, the highest percentage endorsing good value for money was for "short trips" (31%) with all other scenarios being seen as good value by only 17 to 22% of respondents. Overall, only 21% considered taxi offer good value for money.

These results were very close to the results obtained in 2013.

Among those who had taken a taxi in the circumstances described in a scenario, between 22% and 26% considered that use of a taxi to be "good value" for each of the day and time combinations. Short trips were seen as good value by 35% of those who had taken such trips. Long trips were seen as good value by only 15% of those who had taken such trips. Even short trips were seen as good value by only a minority of those with experience with that type of trip.

In 2014 Other Urban and Country residents were a little more likely to consider short trips good value for money than were those living in Urban Sydney (42% and 40% of those who had experience with short taxi trips compared to 35% in Urban Sydney). They were more likely than Urban Sydney residents to consider taxis fares offer good value for money (27% of Other Urban and 33% or Country compared to 21% of Urban Sydney taxi users) and or specific times. Country users were particular likely to consider trips on a Friday or Saturday evening to be good value (39% on n=80 users compared to 26% in Urban Sydney and 33% of n= 162 Other Urban users). However, for all three locations, less than 40% of users with experience of a scenario considered taxi fares good value for that scenario.

Figure 46. Trips seen as offering value for money Urban Sydney 2014



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.

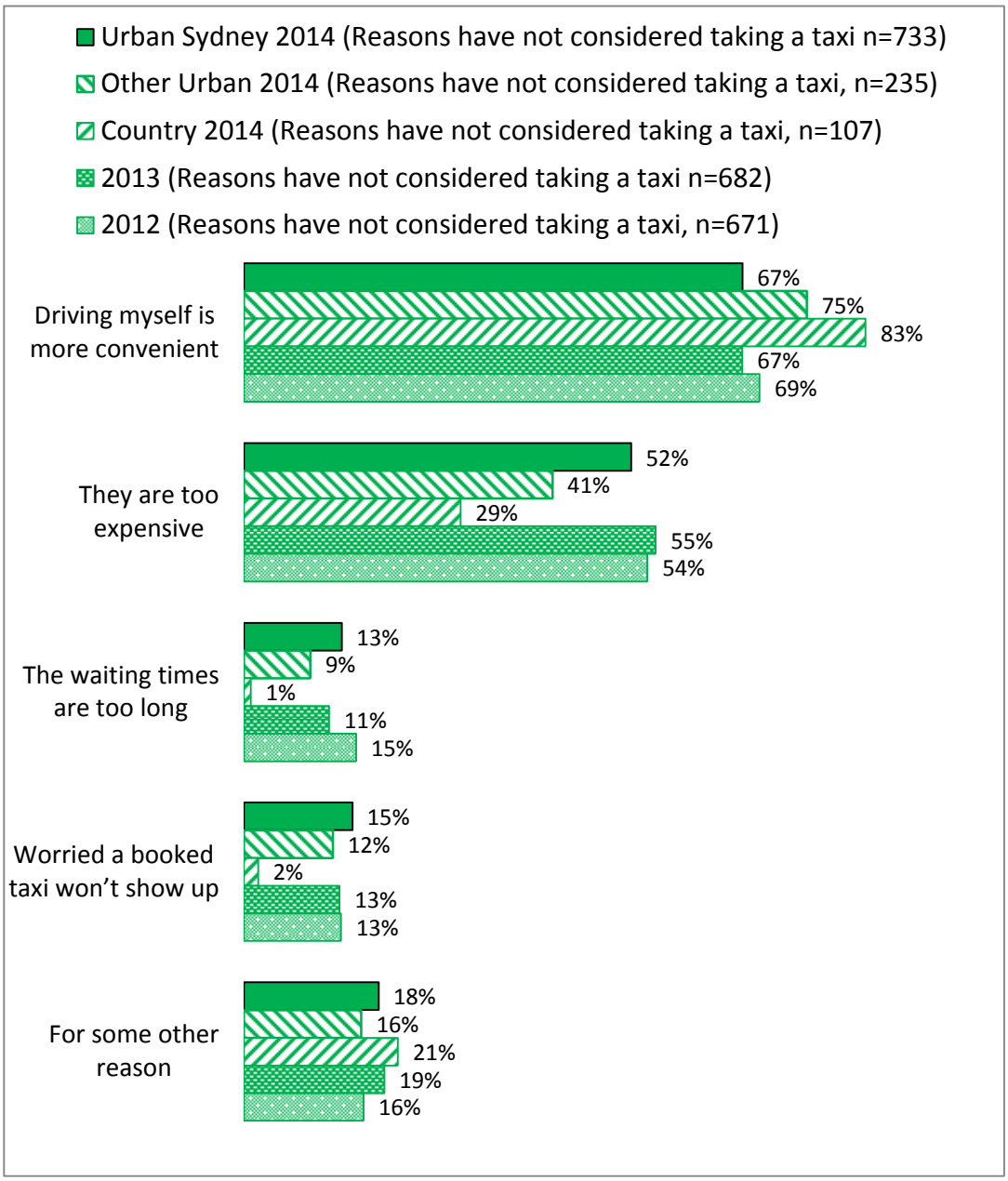
Convenience and cost dominate the reasons given in all 2014 locations and in both previous years.

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

The Urban Sydney 2014 results were very close to those obtained in 2013 and 2012.

In 2014, results from those in the Other Urban locations were quite similar to the results for those in Urban Sydney, although convenience was even more often endorsed and being too expensive somewhat less often. Those in Country locations were especially likely to endorse convenience and considerably less likely to endorse being too expensive, long waiting times or being concerned a booked taxi will not show up.

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

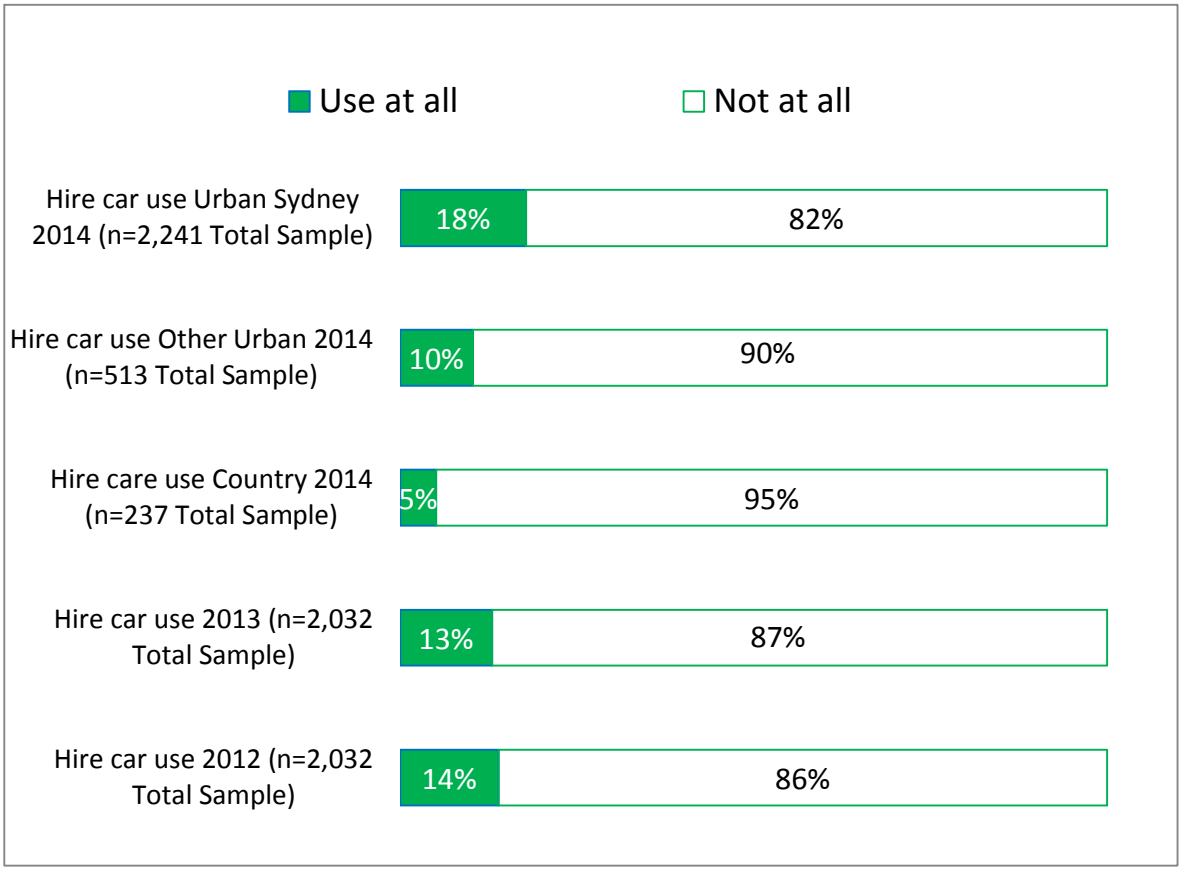
8. Hire car, car share and ride share services

8.1. Frequency of use

Respondents were all asked whether they had used a hire car with a driver in the past six months. Figure 48 shows a slightly higher incidence in Sydney in 2014 than in the two previous years, but use remained under 20% in the past six months. Use was much lower in Other Urban (10%) and Country (5%) locations in 2014 than in Urban Sydney (18%).

There was no change in the proportion of the total sample using a hire car in the last six months, and the distribution of frequency of use was also shows very little change.

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

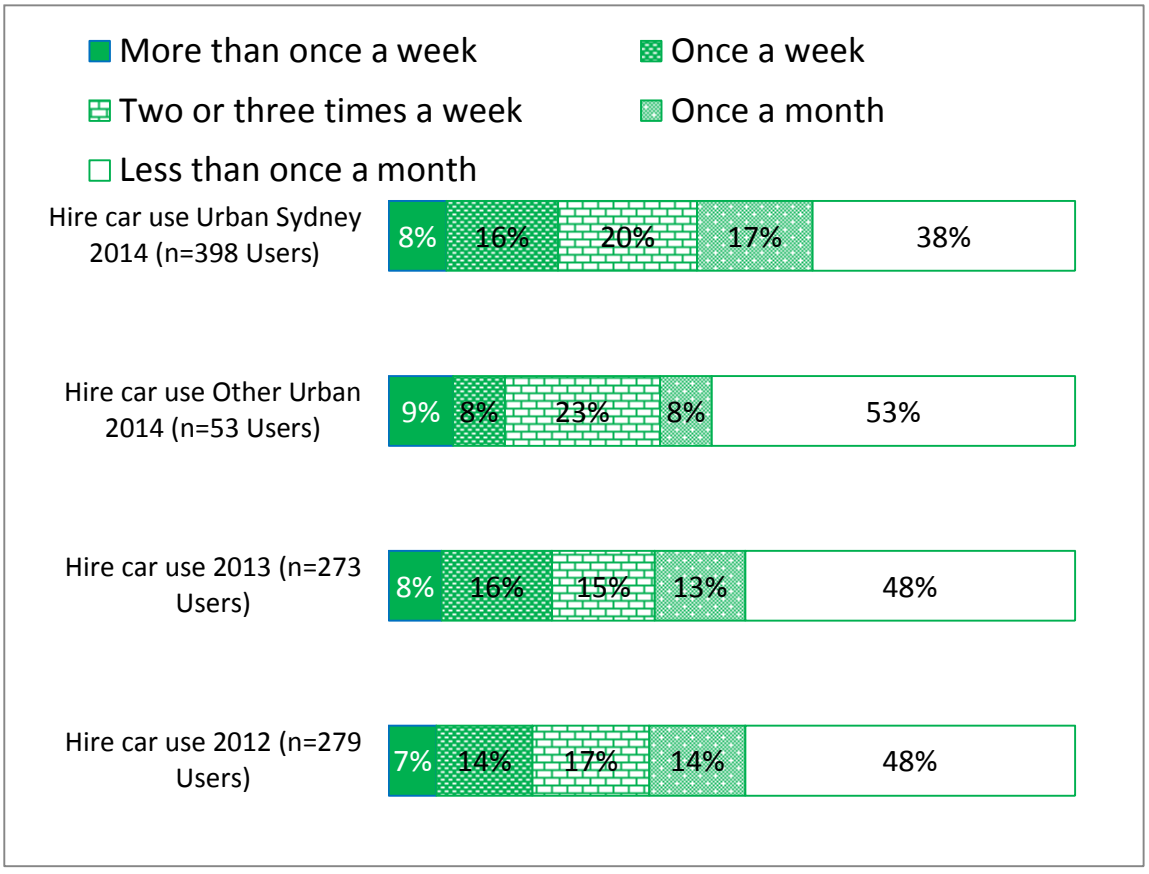


Q42. In the last six months I have used a hire car with a driver …

The frequency of use among users is shown in Figure 49. Results for Country locations in 2014 are not shown as there were only n=12 users.

Most users do so less than once a month. Use was more frequent among Urban Sydney users than in the Other Urban locations in 2014 and the frequency of use in Urban Sydney is higher in 2014 than in the two previous years/

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



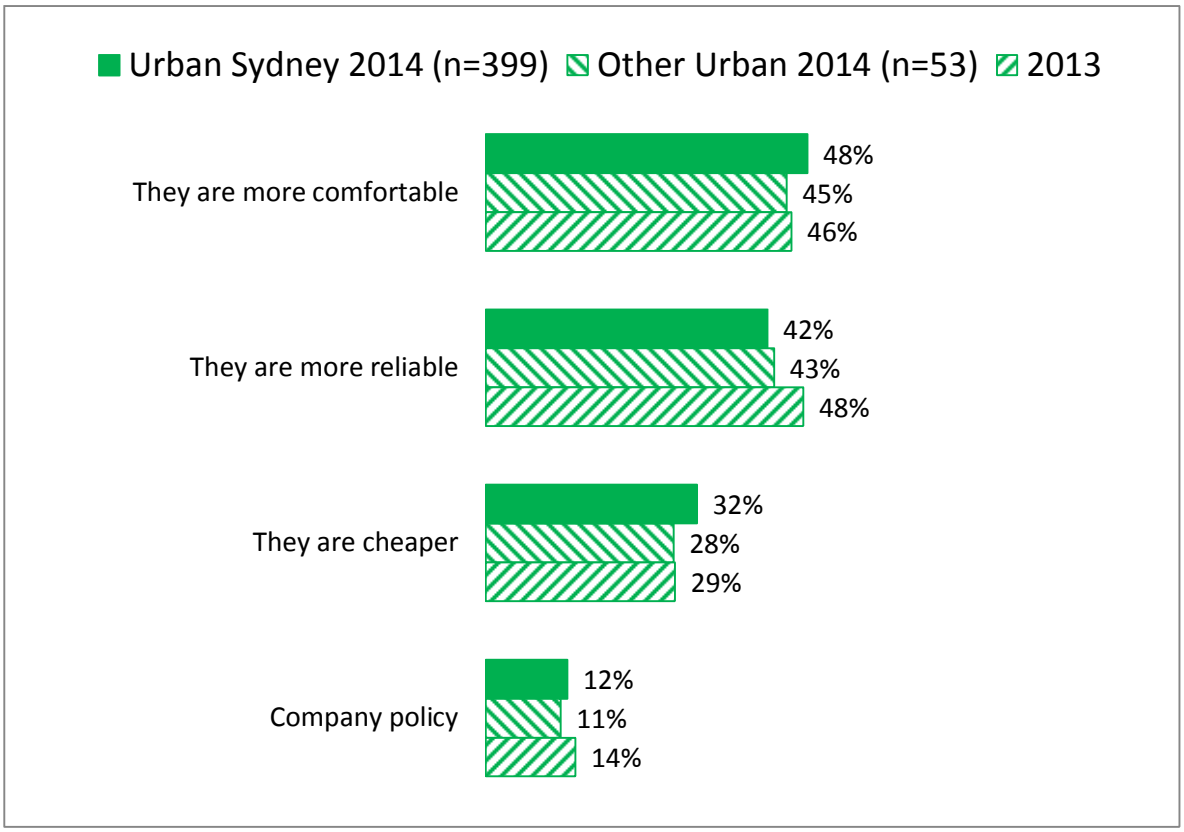
Q42. In the last six months I have used a hire car with a driver …

8.2. Reasons for use

Figure 50 shows the reasons endorsed for using a hire car.

Comfort and reliability were the dominant and almost equally often endorsed reasons for using a hire car rather than a taxi, followed by considering the hire car cheaper. Some reported it was company policy. Many endorsed more than one of the reasons.

Figure 50. Reasons for using a hire car



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

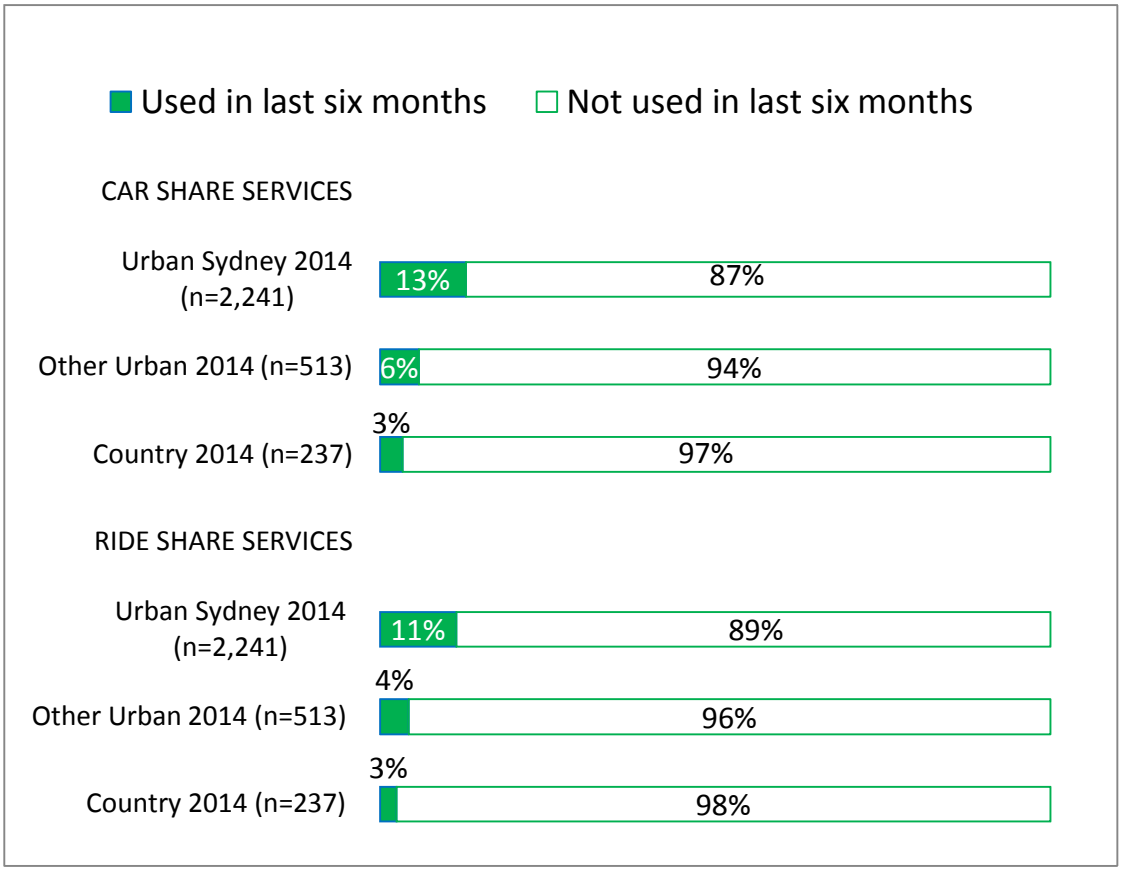
8.3. Use of car share and ride share services

In 2014 questions were added to assess the use of car share services and of ride share services.

The incidence of use of these services in Urban Sydney, Other Urban and Country locations in 2014 is shown in Figure 51.

There were very few users outside the Urban Sydney region and only 10 to 13% in Urban Sydney had used each type of service in the last six months. This level is similar to the use of a chauffeured hire car in Urban Sydney in 2012 and 2013.

Figure 51. Use of car share and ride share services in last six months by location 2014



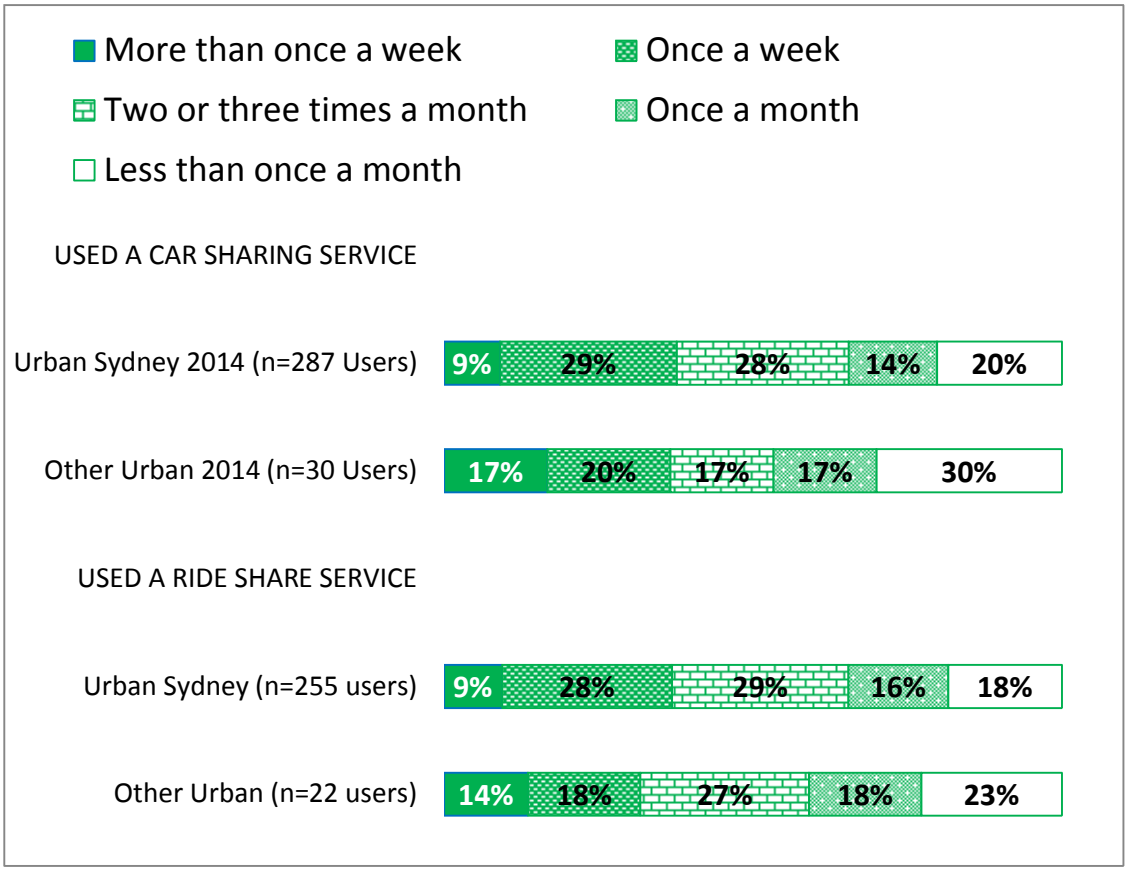
Q47. In the last six months I have used a car sharing service (for example, GoGet, GreenShareCar, Car Next Door or Hertz 24/7) …
Q49. In the last six months I have used a ride sharing service (for example, UberX or RideSurfing) …

Figure 52 shows the frequency of use for users in Urban Sydney and Other Urban locations in 2014. There were less than 10 users of either type of service 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.

Car sharing users in Urban Sydney make somewhat more frequent use of car sharing than those in the Other Urban locations. There is only a slight difference between locations in the frequency of use reported by ride sharing users. For both, users in Other Urban locations were more likely to use more than once a week and there was little difference in how many in each location reported using the service at least once a week. This is consistent with these services being used for journeys to and from work more than hire car services.

Figure 52. Frequency of using car share and ride share 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) …

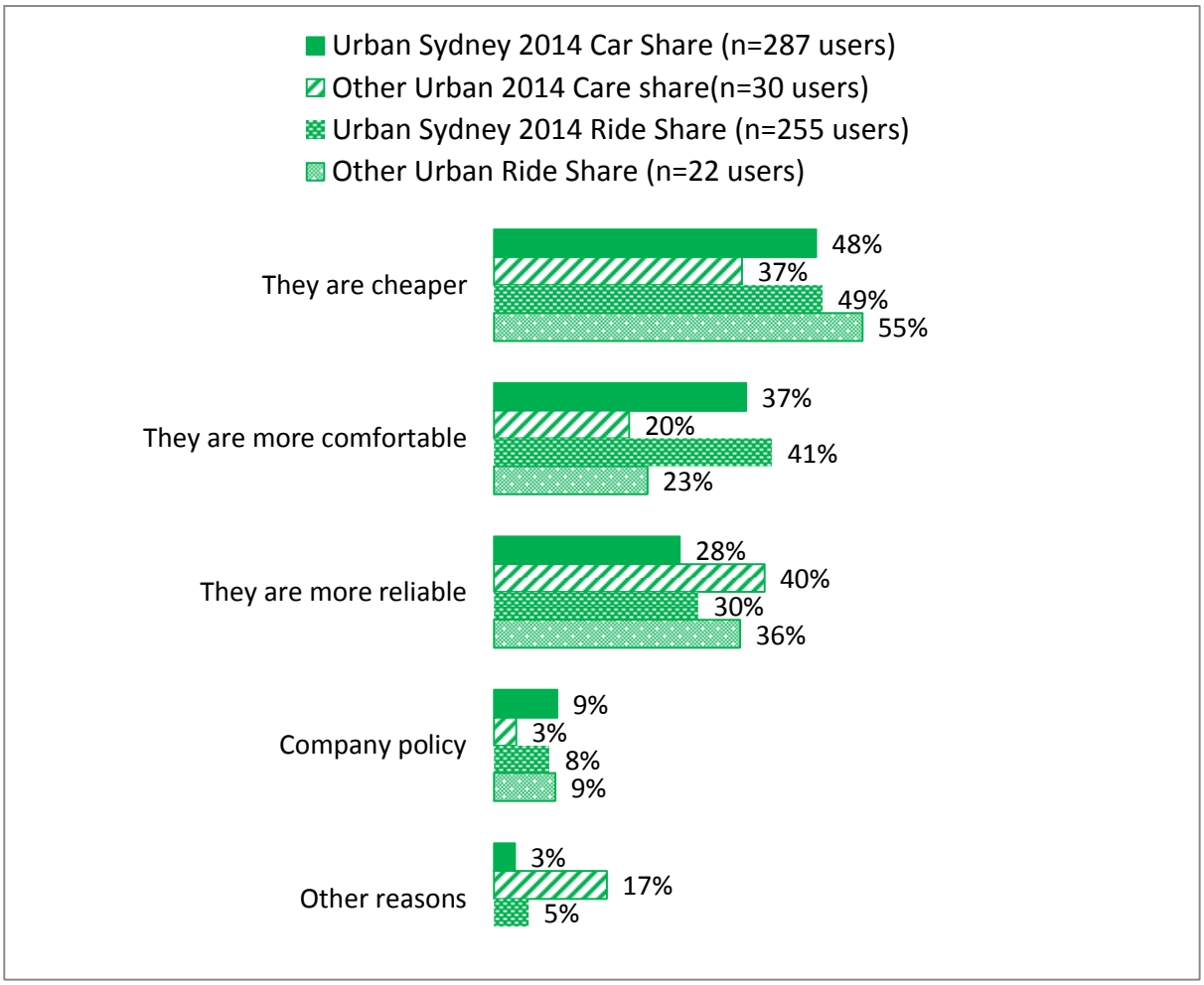
Figure 53 shows the levels of endorsement of the reasons listed in the questionnaire for use of car sharing and ride sharing services. The replies were similar but showed some variations between Urban Sydney and Other Urban locations (but given the small Other Urban samples of users, these differences could well be due to chance).

Being cheaper than taxis stands out as the reason most commonly endorsed for both types of service in both locations. This is a marked contrast to the reasons for using hire cars.

Comfort was the reason endorsed next most widely in Urban Sydney, while reliability was the second ranked reason in the Other Urban locations.

There was no clear pattern in the verbatim reasons given by those who volunteered other reasons.

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 …
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)

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

****ALL PARTICIPANTS

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
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 NIIGHTS
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
3. legions
3. uber
4. gocatch
5. ingogo
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" cab
2. a cab 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 bus
4. Used community transport
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 44/7
9. Used a ride sharing service such as UberX or RideSurfing

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 5-7Alighted
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 way 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

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 Q5DEM

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)

***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 DISABLITY
I …

1. Have a physical disability
2. Do not have a physical disability

IF CODE 2 AT Q6DEM GO TO Q99END

Q7DEM WHEELCHAIR
I can ...

1. Catch any type of taxi
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 (Wt) for a cell is the ratio of the target for that cell to the actual obtained frequency.

The targets were calculated by multiplying the estimated population proportion in a cell as a proportion of the column total population by the total sample size for that location.

Targets were rounded to the nearest whole number. Due to this rounding some of the obtained total target frequencies vary slightly from the actual total frequencies.

Table 2. Calculating case weights

SUB GROUP	Urban Sydney TARGET	Urban Sydney ACTUAL	Urban Sydney Wt= T/A	Other Urban TARGET	Other Urban ACTUAL	Other Urban Wt= T/A	Country TARGET	Country ACTUAL	Country Wt= T/A
Males 16-19	70	33	2.1212	17	7	2.4286	7	3	2.3333
Males 20-29	201	144	1.3958	52	34	1.5294	23	10	2.3000
Males 30-39	199	214	0.9299	38	31	1.2258	18	17	1.0588
Males 40-49	190	218	0.8716	41	36	1.1389	19	16	1.1875
Males 50-59	168	216	0.7778	39	60	0.6500	20	23	0.8696
Males 60 plus	239	305	0.7836	68	104	0.6538	31	35	0.8857
TOTAL MALES	**1.067**	**1,130**		**255**	**272**		**118**	**104**	
Females 16-19	64	62	1.0323	16	8	2.0000	3	3	1.0000
Females 20-29	231	339	0.6814	44	58	0.47586	27	30	0.9000
Females 30-39	234	194	1.2062	39	40	0.9750	16	19	0.8421
Females 40-49	205	152	1.3487	42	37	1.1351	19	20	0.9500
Females 50-59	172	171	1.0058	41	45	0.9111	19	28	0.6786
Females 60 plus	268	193	1.3886	79	54	1.4630	36	33	1.0909
TOTAL FEMALES	**1,174**	**1,111**		**261**	**242**		**120**	**133**	
TOTAL SAMPLE	**2,241**	**2,241**		**516**	**514**		**238**	**237**	

"Target" reflects estimated population distribution.

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