

1 About the survey

We regularly survey Sydney, Other Urban and country residents about their use (and non-use) of taxis and other forms of point-to-point transport. The February surveys target residents of Urban Sydney and the November surveys target Urban Sydney, Other Urban areas and country towns. The findings inform our reviews of taxi fares and licences. In response to changes in the market for point-to-point transport, we have expanded our survey questions to gain additional information on services such as ride sharing, car sharing, community and courtesy transport.¹

We commissioned Taverner Research to undertake the latest survey in February 2017. Over 2,000 people in Sydney were surveyed. Taverner's report on this survey is on our [website](#). A copy of the survey questionnaire is included in Taverner's report.

This information paper summarises the findings of the February 2017 survey.

For the latest information about use of point-to-point transport services outside Sydney see Taverner's report [Survey of Point to Point Transport Use - November 2016](#).

2 Key findings

Demand for point-to-point transport in Urban Sydney continued to grow in 2016 and 2017. While demand for taxis was relatively stable, ride share use increased. Car share and hire car use has levelled since November 2016 (car share) and February 2016 (hire car).

The proportions of people using taxis and frequency of taxi use are consistent with previous surveys. The survey also found that passengers' experiences and views on waiting times, fares and value for money were similar to the results from our 2012 to 2015 surveys.

In the six months prior to the survey:

- ▼ 68% of Urban Sydney adults had used a paid point-to-point service (taxi, ride share, car share or hire car), an increase from 65% in November and February 2016, 58% in February 2015
- ▼ 61% had used a taxi (stable at 60% to 61% since November 2015)
- ▼ 37% had used ride share (compared to 33% in November 2016, 23% in February 2016, 10% in February 2015)
- ▼ 24% had used a hire car (the same as in November and February 2016) up from 16% in February 2015, and
- ▼ 22% had used car share (the same as in November 2016) up from 18% in February 2016 and 13% in February 2015.

¹ Ride sharing was legalised in December 2015. See Minister for Transport and Infrastructure, [A new transport economy: consumer choice, competition and downward pressure on fares](#), Media Release, 17 December 2015.

3 Taxi use

Taxi use is similar to previous years

- ▼ 61% of adults in Urban Sydney had used a taxi in the previous six months
- ▼ 14% of adults in Urban Sydney used a taxi at least once a week (13% to 16% across all survey years)
- ▼ 28% of adults in Urban Sydney used a taxi at least once in the previous six months but less than once a month (24% to 28% across all survey years).

These results are similar to those reported in previous years.

Urban Sydney adults were more likely to say they had used taxis *less* (24%) than *more* (16%). This pattern of response has been largely consistent across all survey years.

Most recent taxi trip

Most taxi users catch a taxi at a rank or hail a taxi in the street

On their last taxi trip, the bulk of taxi users used one of the traditional methods of obtaining a taxi - catching at a rank (30%), hailing in the street (25%) or phoning the taxi company (28%). Less than 10% made an internet booking.

Waiting times are longest when booking 'next available' taxi

The method of obtaining a taxi had the biggest effect on waiting time, with booking the next taxi available resulting in the longest wait times. In each survey, waiting less than five minutes was much more likely if boarding at a rank (60% of boardings at a rank in February 2017) or hailing a passing taxi (51% of hailed trips in February 2017) than if booking the next available taxi (11% in February 2017).

No change in being able to get a taxi when wanting one

All taxi users were asked whether they had been able to obtain a taxi the last time they tried and if not, why. The overall results are similar to those obtained in previous years, with around 75% able to get a taxi the last time they tried.

The reasons given for being unable to obtain a taxi were:

- ▼ a booked taxi did not turn up (12% in Urban Sydney in February 2017 – consistently between 10% and 14% across survey years)
- ▼ being unable to find a taxi when trying to hail one from the street (7% in Urban Sydney, in February 2017 – consistently between 7% and 8% across the survey years), and
- ▼ not being able to find one at a taxi rank (6% in Urban Sydney in February 2017 – consistently between 5% and 7% across the survey years.)

Taxi fares paid have remained stable

The estimated median taxi fare in Urban Sydney has ranged from just under \$28 to just under \$30 since 2014.

Taxi passenger experiences

Most taxi users think taxis do not offer value for money

Most taxi users do not consider taxi trips offer good value for money in general (over 70% across survey years) or for any of a range of different trip scenarios (60% to 80%).

The survey found:

- ▼ only 28% of taxi users considered taxis generally offered good value for money in general (same as in November 2016, 20% to 22% in previous years) and
- ▼ Cheaper fares would be the main motivation to increase taxi use in the next 12 months (43% of respondents).

Around one-in-three taxi users experienced problems in the previous year

In 2017, 33% of Urban Sydney taxi users reported having had one or more problems either during a taxi journey or when trying to catch a taxi in the last 12 months. This is similar to the results in previous years of the survey (33% to 38% with no clear pattern over time).

The most commonly reported problems were, in order of how frequently they were reported:

- ▼ not being able to get a taxi when one was wanted
- ▼ drivers not taking the most direct route
- ▼ drivers not knowing where they were going, and
- ▼ being overcharged.

4 Ride share use

Ride share use is continuing to increase in Sydney

Use of ride share (such as UberX, GoCar, GoBuggy) increased in Urban Sydney.

- ▼ 37% of Urban Sydney adults had used ride share in the previous six months (up from 33% in November 2016, 23% in February 2016 and 10% in February 2015)
- ▼ 30% of Urban Sydney ride share users had used ride share at least once per week (32% in November 2016, 33% in February 2016 and 35% in February 2015)
- ▼ 33% of Urban Sydney ride share users had used a ride share less than once per month (32% in November 2016, 27% in February 2016 and 15% in February 2015).

Respondents were asked if they used ride share more or less than in the previous year. Most Urban Sydney residents said their use of ride share either *increased* (19%) in the previous 12 months or stayed the same (73%). Less than 10% reported they had used ride share less often.

People use ride share services more because they are cheaper

The most common reason ride share users gave for having used ride share services more was that they were less expensive (54%).

Ride share users also use taxis, but say they are using them less

Urban Sydney adults who had use ride share in the previous six months are very likely to have also used a taxi (91%) and to be frequent taxi users (31% at least once a week).

When ride share users were asked the effect of their use of ride share services on their use of taxis, 69% said it had stopped or reduced their use of taxis (stopped 12%, reduced a lot 31%, reduced a little 27%). Despite these reported impacts the prevalence and frequency of taxi use overall has remained very stable across the survey years.

Most recent ride share trip

Ride share waiting times are more reasonable

Ride share users were asked if they considered waiting times reasonable at different times of the day and days of the week. Waiting times for obtaining a ride share were significantly more likely to be considered reasonable than waiting times for a taxi. The largest difference was on Friday and Saturday nights when 72% of Urban Sydney ride share users considered the waiting times reasonable compared with 36% of Urban Sydney taxi users.

Fares paid for ride share are slightly lower

The estimated median fare for a ride share trip in Urban Sydney was around \$23 (\$25-\$26 in November 2016), lower than the estimated median for taxi trips (around \$28 in both these surveys).²

Ride share passenger experiences

Most ride share users think ride share offers value for money

- ▼ 75% of ride share users thought ride share generally offers good value for money (in contrast to 28% of taxi users). When surge (peak) pricing is operating this drops to 26%.
- ▼ Convenience (30%) and the lower cost of ride share services (27%) were the main reasons for its use.
- ▼ 20% of those surveyed said they would use ride share more regularly if fares were cheaper or if there were no surge pricing (9%).

Around one-in-four ride share users experienced problems in the previous year

About one in four (24%, 27% in November 2016) Urban Sydney adults who had used a ride share service reported they had a problem in the past twelve months when using the service or when trying to use the service. The most commonly reported problems were the same as those reported for taxis. They were, in order of how frequently they were reported:

- ▼ not being able to get a ride share service when one was wanted
- ▼ being overcharged
- ▼ drivers not taking the most direct route, and

² The Taverner report on the November 2016 survey incorrectly reported the median ride share fare as \$34. The correct value was \$25 to \$26.

- ▼ drivers not knowing where they were going.

5 Car share and hire car use

Use of car share and hire car services is levelling after years of growth

- ▼ 22% of Urban Sydney adults had used a car share service (such as GoGet or Car Next Door) in the previous six months (same as in November 2016, 18% in February 2016, 13% in February 2015).
- ▼ 24% of Urban Sydney adults had used a hire car in the previous six months (same as in November and February 2016, 16% in February 2015).

6 Use of courtesy transport and community transport

Use of courtesy transport and community transport is levelling after years of growth

- ▼ 26% of Urban Sydney adults had used community transport in the previous six months (27% in November 2016, 23% in February 2015)
- ▼ 25% had used courtesy transport (same as in November 2016, 21% in February 2015).