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Report on:

Comparing Surveys of Point to Point Transport Use, November 2014 to February 2017

Prepared for: IPART

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1. Executive summary

IPART commissioned Taverner Research to conduct online surveys of representative samples of the Urban Sydney population in November 2014 (n=2,241), February 2015 (n=2,049) November 2015 (n=2,198) February 2016 (n=2,017) November 2016 (n=2,021) and February 2017 (n=2,002) to establish for each measure of the use made of point to point transport, whether there is evidence of:

- A “seasonal” effect producing consistent differences in the results obtained in each November Wave from results obtained in the following February Wave
- Trends over time with evidence of a consistent increase or decrease in a behaviour, belief or attitude

Relevant measures of behaviour, beliefs and attitudes that are examined in this report include:

- The prevalence and frequency of using taxis, ride share, car share, hire car, courtesy transport and community transport in the previous six months
- Reasons for use (among users) or non-use (among non-users) of taxis, car share and ride share
- Perceived value for trips at different times on different days, and for short trips compared to long trips
- What would persuade respondents to make more use of taxis and/or ride share services in future
- Experience with, and evaluations of taxi services among taxi users and of ride share services among ride share users
- Particular problems experienced with taxi use due to physical disability, and in particular use of a wheelchair
- Prevalence of seeking to use and being unable to obtain a taxi and of seeking and being unable to obtain a ride share service.

While the samples are not an exact match to ABS estimates of the age by gender distribution of the populations of Urban Sydney, 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. However, to ensure that any differences in the age group by gender distribution did not produce spurious differences between the results of the six survey Waves, the results are reported using unweighted data.

This report compares six survey Waves to identify any "seasonal" effects or time trends. Detailed analysis comparing sub-groups within a Wave are not generally reported here. Such analyses have been extensively reported for each November Wave of data collection from 2012 (the first survey) onwards.

From the replies we found that:

- There is no evidence of a seasonal effect on any of the measures obtained
- Nor is there consistent evidence of a trend towards increased or decreased prevalence of using a taxi in the previous six months; prevalence has barely changed for the four most recent survey Waves (being 60% or 61%) and is only slightly higher in these Waves than in the February 2015 (55%) and November 2014 (58%) Waves
- Frequent taxi use (at least once a week) showed little change over the six survey Waves, varying between 13% and 15% of respondents with no consistent pattern
- Use of taxis more than once a month is also quite stable (23% to 27% of respondents)
- The prevalence of reported use of ride share services in particular has shown steady increases since February 2015.
    - Between November 2015 and February 2016, and between November 2016 and February 2017, the increase has been around four percentage points.
    - Between February 2015 and November 2015, and between February 2016 and November 2016, the increase has been nine to ten percentage points.
    - The increases for each 12 month period (November to November or February to February) are between thirteen and fourteen percentage points except for November 2014 to November 2015 which was eight percentage points.

  - There is so far no evidence that the growth is slowing.

- The surveys find repeated evidence that cost of taxi use is a major barrier to use and a major influence motivating those who have begun to use ride share services in particular

- Other evidence of the role of cost in decisions to not use a taxi include the perception that taxis do not offer value for money, the citing of cost as a reason for not using a taxi, the belief that ride share services offer good value for money being much more prevalent than the belief that taxis offer good value for money, and the citing of being cheaper as a reason for choosing to use ride share services rather than to use a taxi

- The importance of price is also shown by reduced fares being the improvement that would be most likely to persuade both users and non-users of taxis and of ride share to increase their use

In all six survey Waves:

- Mode of obtaining a taxi has the biggest effect on waiting time, with booking the next available taxi producing the longest waiting times

- Waiting times for taxis tend to be higher on Friday and Saturday nights than on weekdays or other nights

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

One area of change is the use of point to point transport. In addition to hire cars, the 2015 and 2014 surveys asked about use of car share and ride share services, and from the November 2015 survey on, surveys asked about use of courtesy transport and community transport services.

Over the six survey Waves:

- As already noted, the prevalence of using a ride share service in the past six months has grown steadily since February 2015, with growth over 12 months being between thirteen and fourteen percentage points

- After some growth, the prevalence of using car share services and hire car services in the past six months both appear to have stabilised at around 22% for car share and 24% for hire car services.

- The prevalence of using a courtesy transport service in the past six months has risen from 21% in November 2015 to 25% in February 2017.
- The prevalence of using a community transport service in the past six months has risen from 21% in November 2015 to 26% in February 2017.
- The increases in the prevalence of use of courtesy transport and community transport are small and at best marginally significant
- The ranges for courtesy transport (21% to 25%) and community transport (21% to 26%) include the recent prevalence of using a car sharing service (22%) and of using a hire car service (24%).
- In all survey Waves, frequency of using alternative forms of door to door transport (hire car, ride share services, car share services, courtesy transport and community transport) are each associated with more frequent taxi use.
- This suggests that use of point to point services is driven first by a need that cannot be met by use of a private vehicle or of public transport, and then by price, availability and (for taxi use) by habit.
- Given the results to date:
    - The prevalence of using ride share services can be expected to continue to increase as availability and awareness of the price difference continue to grow.
    - Although there is no evidence for declining taxi use in the survey Waves reviewed, the prevalence and frequency of taxi use might start to decline as taxis lose market share to ride share services.
    - However, it is possible that taxi use will remain stable, with the total prevalence and frequency of using paid point to point services increasing overall as these newer options become more affordable and available.

- o The prevalence of having used one or more of the paid point to point services in the past six months shows statistically significant trend upwards, starting at 61% (November 2014) and then being 58%, 63%, 65%, 65% and 68%. February 2017 is significantly higher than November 2014 and February 2015, although the differences (seven percentage points and ten percentage points) are not large.
- o The overall frequency of use of other point to point services excluding taxis has increased, despite some decline in the frequency of use of ride share services.
- o The results are consistent with an increase in that the overall frequency of use among users of point to point services other than taxis combining with an increase in the percentage of the population that is using these services to produce a stable prevalence of taxi use while other forms of point to point transport are growing.

2. Background & Introduction

IPART commissioned Taverner Research to analyse and report on results of online surveys of representative samples of Urban Sydney adults that had been conducted in November 2014, February 2015, November 2015, February 2016, November 2016 and February 2017. These six surveys are part of an ongoing program of surveys about access to and use of taxis in the Sydney transport region. Previous surveys were conducted in November 2012, November 2013, and February 2014.

The results reported here are all for samples of residents of Urban Sydney. Data obtained from Other Urban (Newcastle, Central Cost and Wollongong) and Country Towns in the surveys conducted in November of each year are not included in this report.

Particular attention is paid to giving consideration to taking a taxi and either being unable to obtain one or deciding for other reasons to not use a taxi.

Most items are asked in exactly the same way in all six surveys reported here. A few are updated to improve the quality of the data based on the results of previous surveys and to reflect recent developments in the taxi market. Some additional items, especially about ride share services and car share services were introduced in the November 2016 survey Wave.

Where possible, comparisons are reported between the results of the six Urban Sydney survey samples (November 2014, February 2015, November 2015, February 2016, November 2016 and February 2017).

Where differences are highlighted, these are statistically significant unless stated otherwise.

3. Methodology

3.1. The survey questions

The survey items were designed to assess:

- Postcode (to ensure respondents were in the defined target area
- Gender and age group (to allow management of the sample composition)
- Work status (as this influenced whether some questions were asked)
- Frequency of using taxis, ride share, car share, hire car, courtesy transport and community transport services within the past six months
- In November 2016 and February 2017, for all who had used a taxi but not a ride share service in the past six months, and a randomly selected sub-group (around 70%) of those who had used both in the past six months, were asked for their most recent taxi trip …
    - Origin
    - Destination
    - Whether the journey used the Sydney Harbour Bridge (SHB) or Sydney Harbour Tunnel (SHT) and in which direction
    - Day of week
    - Time of day
    - Distance travelled
    - How the taxi was obtained
    - Time required to obtain a taxi (unless booked for a specific time)
    - Whether on time and how late (if booked for a specific time)
    - Action taken if a booked taxi did not arrive or was late
    - Satisfaction with the time taken to obtain a taxi
    - Fare paid

- Who was responsible for paying the fare
- Reason for use
- Satisfaction with the fare paid

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

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

✧ In November 2016 and February 2017, for all those who had used a ride share service in the past six months:

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

- In November 2016 and February 2017, for any who had used ride share and not used a taxi in the past six months and for a random selection (target 30%) of those who had used both, for their most recent ride share trip:
  - Where their journey started, and whether from respondents own house
  - Where they alighted and whether alighted at own house
  - Whether they crossed Sydney Harbour using the bridge or the tunnel
  - The distance travelled
  - Whether the trip was on Monday to Thursday, Friday or Saturday, or on Sunday
  - Whether the trip was in the morning, afternoon, evening or at night after 10pm
  - The main reason for taking ride share
  - The app used to book the journey
  - Whether they booked next available or for a specific time
  - Length of wait
  - Action taken if car booked for a specific time was late
  - Satisfaction with the waiting time
  - Who covered the cost
  - Satisfaction with the fare paid
- In November 2016 and February 2017, for all respondents, whether they had considered taking a ride share trip in the last six months but then not done so, never considered taking a ride share trip (hidden for those who had taken a ride share trip) or had always taken one when they had thought of doing so
- In November 2016 and February 2017, for those who had considered taking a ride share trip but not done so whether they had tried and could not get one, or thought about it and decided to do something different

- In November 2016 and February 2017, the alternative used for those who had not taken a ride share trip when they had thought about doing so
- In November 2016 and February 2017, reason for not taking the ride share trip when they had thought about doing so
- For the trip not taken, the day and time it would have been taken
- In November 2016 and February 2017, for those who had used a ride share service in the past six months any problems experienced with a ride share service in the past 12 months and the nature of the problem (prompted list plus Other [SPECIFY])
- In November 2016 and February 2017, for those who have not considered using a ride share service, the reason for not doing so from a prompted list
- In November 2016 and February 2017, for those who had used a car share service in the past six months:
    - Whether they had used such services more, less or had not changed use in the past 12 months compared to the previous 12 months
    - Reasons for using a car share service more or less (from prompted lists)
    - Which, from a prompted list of reasons would get them to make more regular use of car share services
    - Whether they consider car share services offer good value for money
    - Whether they were able to get a car share when they wanted it the last time they used one
    - The distance covered on their most recent car share trip
    - The main purpose of their most recent car share trip
    - The main reason for using car share for that trip
    - The cost of the trip

    - Satisfaction with the fare paid

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

The questionnaire was substantially revised for the November 2016 and February 2017 Waves to include additional items about use of ride share and car share services, and to ensure a more logical flow of questions. For those who had used both taxis and ride share services in the past six months, questions about the most recent trip were asked for only one mode, with the mode chosen at random on a 70% taxis, 30% ride share basis. This was done by randomly generating a number between one and ten, and asking about the most recent taxi trip for those with a number between one and seven, and about the most recent ride share trip for those with a number in the eight to ten range.

The finalised questionnaire for November 2016 and February 2017 is attached as an appendix to this report. Respondents took around 15 minutes to complete the survey questionnaire which was conducted wholly online. However, completion time varied widely depending on the range of point to point transport services used.

3.2. Sample selection and final sample composition

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

Data collection was typically 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.

Final samples of 2,241, 2,020, 2,199, 2,018, 2,021 and 2,002 usable replies were obtained, in the six consecutive survey Waves (see Table 1).

The distribution of age and gender for the Urban Sydney samples in each survey Wave is reasonably close to the targets set based on ABS estimates of the adult population of Urban Sydney. The only consistent departure from the targets is for Urban Sydney males aged under 20 who are substantially under-represented especially in November 2015 and February 2016.

Table 1. Population targets and actual samples

SUB GROUP	November 2014		February 2015		November 2015		February 2016		November 2016		February 2017	
	TARGET	ACTUAL	TARGET	ACTUAL	TARGET	ACTUAL	TARGET	ACTUAL	TARGET	ACTUAL	TARGET	ACTUAL
Males 16 to 29	271	177	260	228	283	255	259	227	224	159	224	206
Males 30 to 39	199	214	197	182	215	231	197	210	195	199	195	207
Males 40 to 49	190	218	173	173	188	188	173	171	181	181	181	181
Males 50 to 59	168	216	152	152	165	164	151	152	155	154	155	157
Males 60 plus	239	305	212	216	231	232	212	214	217	225	217	218
TOTAL MALES	**1,067**	**1,130**	**994**	**951**	**1,082**	**1,070**	**993**	**974**	**972**	**918**	**972**	**969**
Females 16 to 29	295	401	255	268	277	279	254	261	224	237	224	226
Females 30 to 39	234	194	197	213	215	219	197	208	201	237	201	205
Females 40 to 49	205	152	176	188	192	196	176	177	189	191	189	189
Females 50 to 59	172	171	156	157	170	170	156	158	162	165	162	163
Females 60 plus	268	193	242	243	263	265	242	240	252	273	252	250
TOTAL FEMALES	**1,174**	**1,111**	**1,026**	**1,069**	**1,117**	**1,129**	**1,025**	**1,044**	**1,028**	**1,103**	**1,028**	**1,033**
TOTAL SAMPLE	**2,241**	**2,241**	**2,020**	**2,020**	**2,199**	**2,199**	**2,018**	**2,018**	**2,000**	**2,021**	**2,000**	**2,002**

"Target" reflects estimated population distribution.

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

All samples: Males age 16-19 (under-sampled)
February 2015 sample: Males aged 20-29 (under-sampled)
Males aged 30-39 (under-sampled)
November 2015 sample: Males 30-39 (over-sampled)
February 2016 sample: Males aged 30-39 (over-sampled)
Females aged 30-39 (over-sampled)

The obtained distribution was substantially different from the desired targets for the November 2014 survey Wave. The more recent survey waves were much closer to the population targets.

From the February 2015 survey Wave onward, differences between the expected frequencies based on the population distribution and the actual sample frequencies were <5% of the target frequency except for:

All samples: Males age 16-29 (under-sampled)
February 2015 sample: Males aged 20-29 and Males aged 30-39 (under-sampled), Females 16-49 (over-sampled)
November 2015 sample: Males 30-39 (over-sampled)
February 2016 sample: Males aged 30-39 (over-sampled)
Males 30-39 and Females aged 30-39 (over-sampled)
November 2016 sample: Females aged 16-39 and 60 or more (oversampled)
February 2017 sample: Males 30-39 (over-sampled)

To ensure comparability of the samples by age group and gender, the weighted data use the age ranges 16-29, 30-39, 40-49, 50-59 and 60+ within genders. This still left the 16-19 year old males under-represented compared to the population, especially in November 2015 and February 2016. As age group and gender have only minimal relationships with measures of the use of point to point transport services, there are only small differences between the results using weighted and unweighted results. To have weighted this sub-group up to match population would have involved very large weights that could have distorted some results. As statistical precision and the power to detect differences between sub-groups is greater for unweighted data, and the effects of weighting are small, the unweighted results are used throughout this report unless otherwise indicated.

3.3. Analysis and reporting

Basic analysis produced distributions (frequencies and percentages) of replies for each item for each survey Wave. Given the focus of this report on changes over time, further analysis within each survey Wave to compare sub-groups was not generally included in this report.

Where comparable items were used, the data obtained in the survey Waves are compared. For some items, which were only introduced in the November 2015 Wave data is available for the past four Waves. For some items introduced in November 2016 about ride share and car share services, data are reported only for those two most recent survey Waves.

Differences that are statistically significant and meaningful are mentioned in comments on the graphs of the distribution of replies. When a difference has been labelled as significant, it is statistically significant with a 95% (or greater) level of confidence. Note that when samples of around n=2,000 cases are being compared, quite small differences are statistically significant. Given six survey Waves and comparisons being made on a large number of items, it is also likely that some apparently significant differences have emerged solely by chance.

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

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

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

4. Prevalence and frequency of use

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

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

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

4.1. Prevalence of use of paid point to point services

Taxis continue to be the most widely used paid point to point service, despite growth in the prevalence of using the other services, especially ride share services (see Figure 1).

Prevalence of using a taxi in the past six months has stabilised at 60% to 61% for the last four survey Waves.

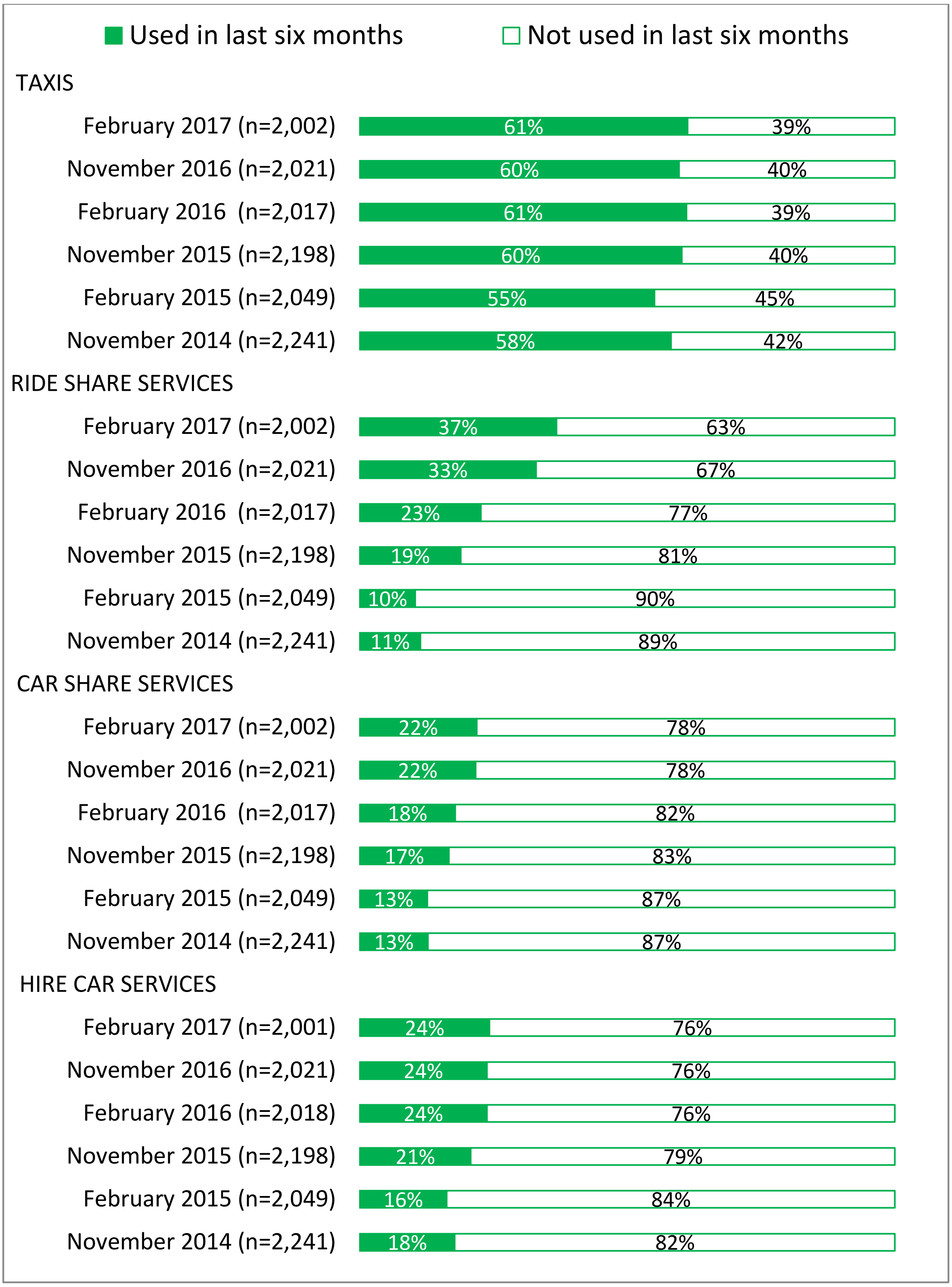
Prevalence of using ride share services has risen steadily since February 2015 when it was 10% to reach 37% in February 2017.

The increases have been quite regular since February 2015. Increases for each 12 month period (comparing each November to the following November and each February to the following February) are thirteen or fourteen percentage points, after a smaller increase from November 2014 to November 2015 (eight percentage points). Increases between November and the following February have been four percentage points, and from February to the following November ten to eleven percentage points since February 2015.

This suggests a steady growth trend that has not yet slowed, after no change from November 2014 to February 2015.

The patterns are quite different for both car share services and hire car services. The prevalence of using car share services show smaller increases from November 2014 (13%) to November 2016 and February 2017 (both 22%). The prevalence of using hire car services rose to 24% in February 2016 and has since remained unchanged.

Figure 1. Prevalence of using each paid point to point service in the past six months by survey Wave



Q1. In the last six months I caught a taxi in Sydney....
Q49. In the last six months I have used a Ride Sharing service (for example, UberX or RideSurfing) ...
Q47. In the last six months I have used a Car Sharing service (for example, GoGet, GreenShareCar, Car Next Door or Hertz 24/7
Q42. In the last six months I have used a hire car with a driver ...

It might be expected that with the growth of alternative services, The prevalence of taxi use would fall. This has clearly not occurred.

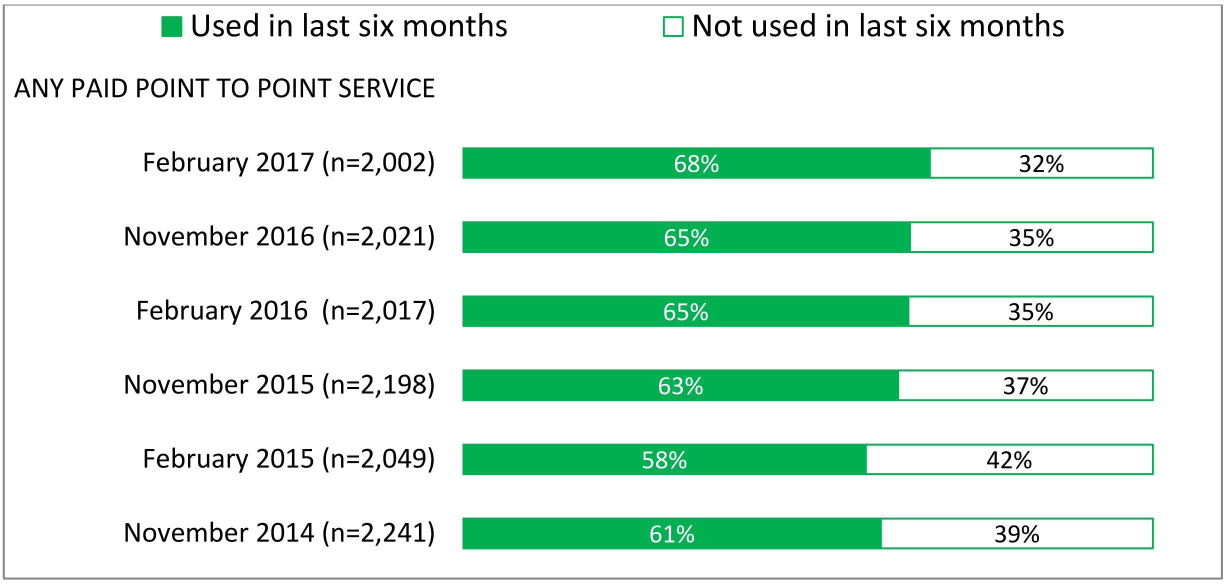
One possible explanation is that the total pool of people using paid point to point services has been expanding, with perhaps those using the newer services being new users.

Although taxi use accounts for the bulk of the use of paid point to point transport and has been quite stable, Figure 2 shows that there has been some growth in the total prevalence of using paid point to point services. People who use one or more of the other services, and have not used a taxi in the previous six months add three to seven percentage points to the total prevalence of using paid point to point services. While this has grown slightly over the six survey Waves, clearly most users of the other services also use taxis.

The prevalence of having used one or more of the paid point to point services in the past six months shows small but statisically significant trend upwards, starting at 61% (November 2014) and then being 58%, 63%, 65%, 65% and 68%. Prevalence in February 2017 is significantly higher than November 2014 and February 2015, although the differences (seven and ten percentage points) are not large.

The results are consistent with an increase in the the overall frequency of use among users of other services combining with an increase in the percentage of the population that is using other services to produce a stable prevalence of taxi use while other forms of point to point transport are growing.

Figure 2. Prevalence of using any paid point to point services in the past six months by survey Wave



Q1. In the last six months I caught a taxi in Sydney....
Q49. In the last six months I have used a Ride Sharing service (for example, UberX or RideSurfing) ...
Q47. In the last six months I have used a Car Sharing service (for example, GoGet, GreenShareCar, Car Next Door or Hertz 24/7
Q42. In the last six months I have used a hire car with a driver ...

4.2. Usual mode of travel

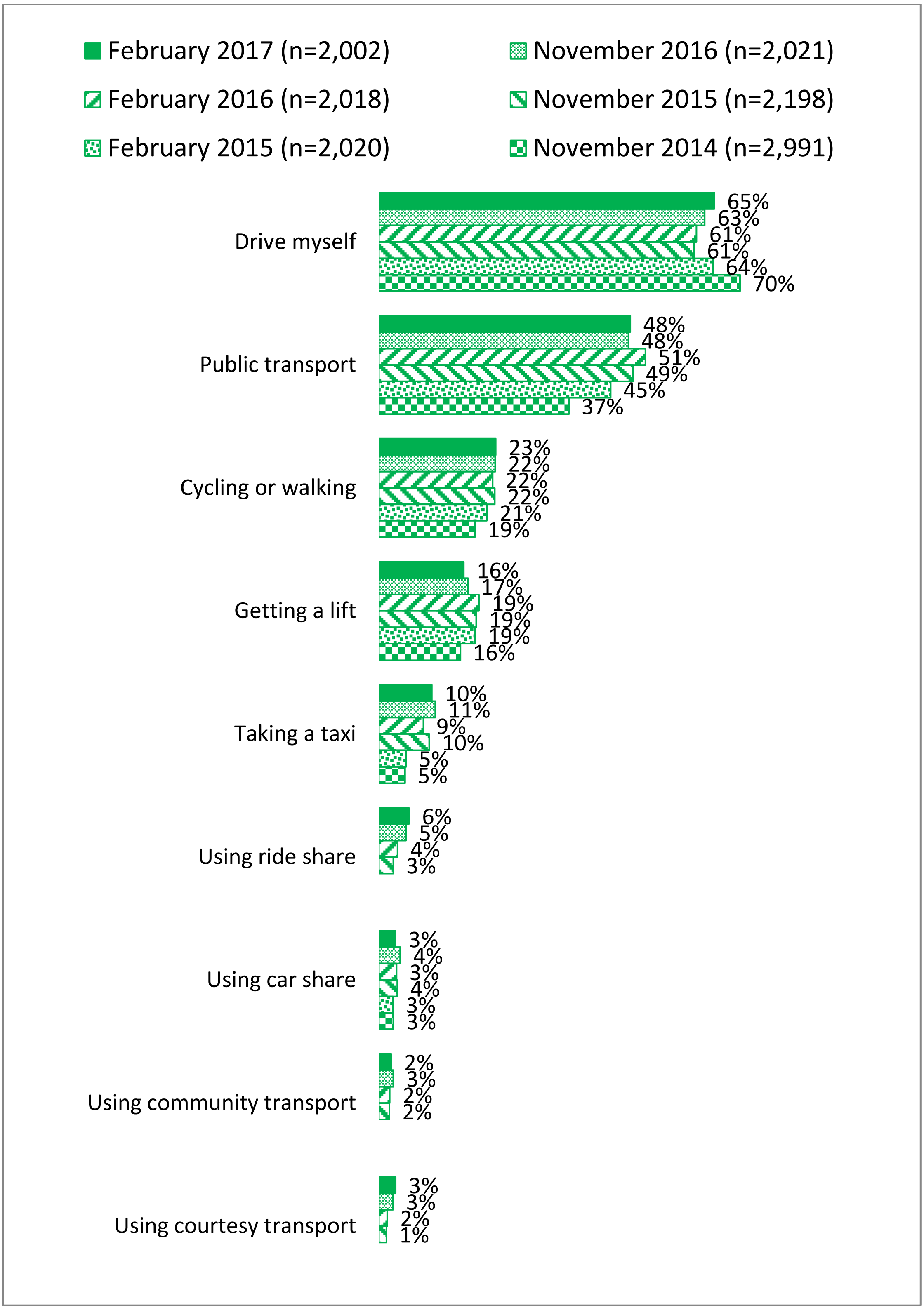
Respondents were asked to select from a list the mode of transport they usually use to get around.

Figure 3 shows that in all six survey Waves, the dominant way of getting around is to use a private vehicle (reported by 61% to 70%), followed by public transport (37% to 51%).

Despite the growing prevalence of using ride share services, ride share is regarded as the usual way of getting around by no more than 6%. However, it does show a consistent (but not statistically significant) increasing trend over the four survey Waves where this option was included in the list, doubling from 3% to 6%. Car sharing has remained between 3% and 4%. Taking a taxi was lower in the first two survey Waves (5%) than in the four more recent Waves (9% to 11%), despite the lack of change found in the reported prevalence or frequency of taxi use. Cycling or walking shows a consistent but not statistically significant trend to increase (from 19% to 23%). Usually getting around by taking a lift has varied from 16% to 19%, without any clear pattern over time.

These results are consistent with the increasing use of ride share, but suggest that it remains a secondary mode of transport for most Urban Sydney residents who use these services.

Figure 3. Usual mode of travel by survey Wave



Q45 I usually get around by ...

4.3. Frequency of taxi use

Frequency of use among taxi users

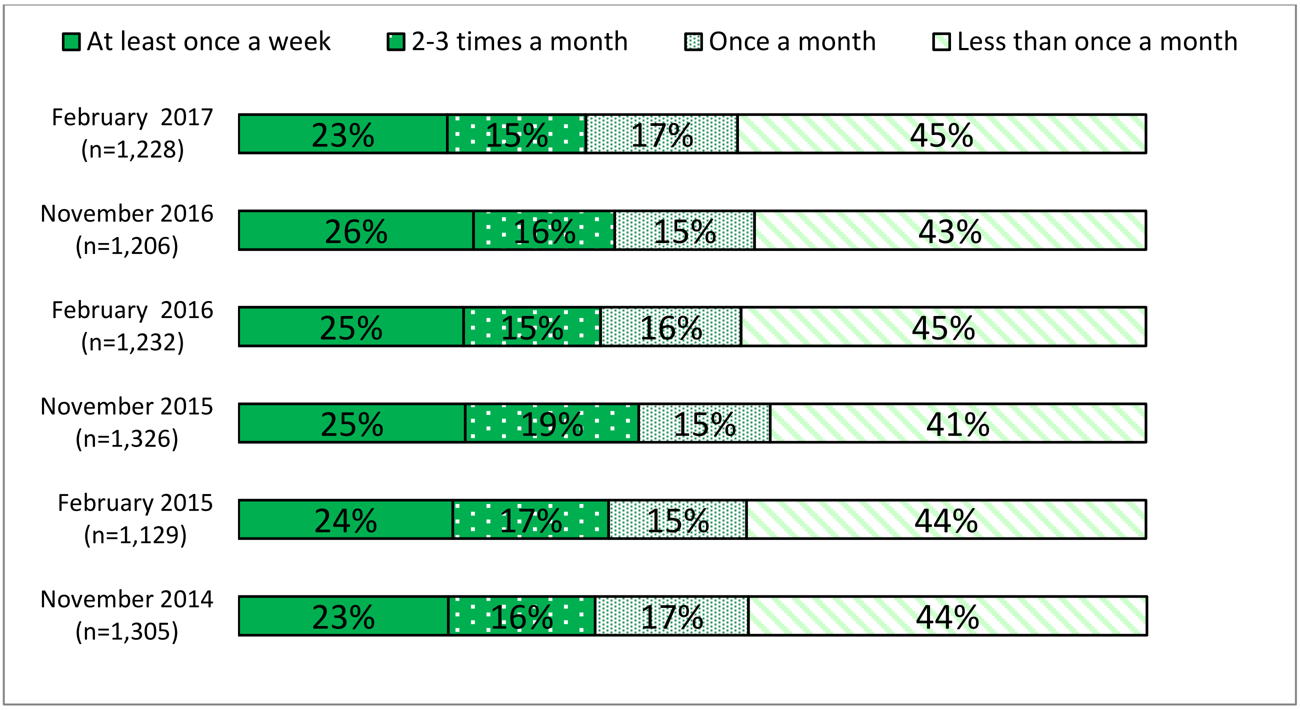
As shown in Figure 4, there has been little variation in the reported frequency of taxi use among users.

- Between 38% and 44% of taxi users report taking a taxi more than once a month (including 23% to 26% of taxi users using once a week or more often, and 15% to 19% of users doing so two or three times a month)
- 55% to 59% of taxi users report using a taxi once a month or more often

The results show no evidence of any trend over time, or of a seasonal effect (in which the results for November differ consistently from those for the subsequent February survey Wave).

Based on these results, both the prevalence and frequency of taxi use has remained very stable over the six survey Waves.

Figure 4. Frequency of taxi use among taxi users in the past six months by survey Wave



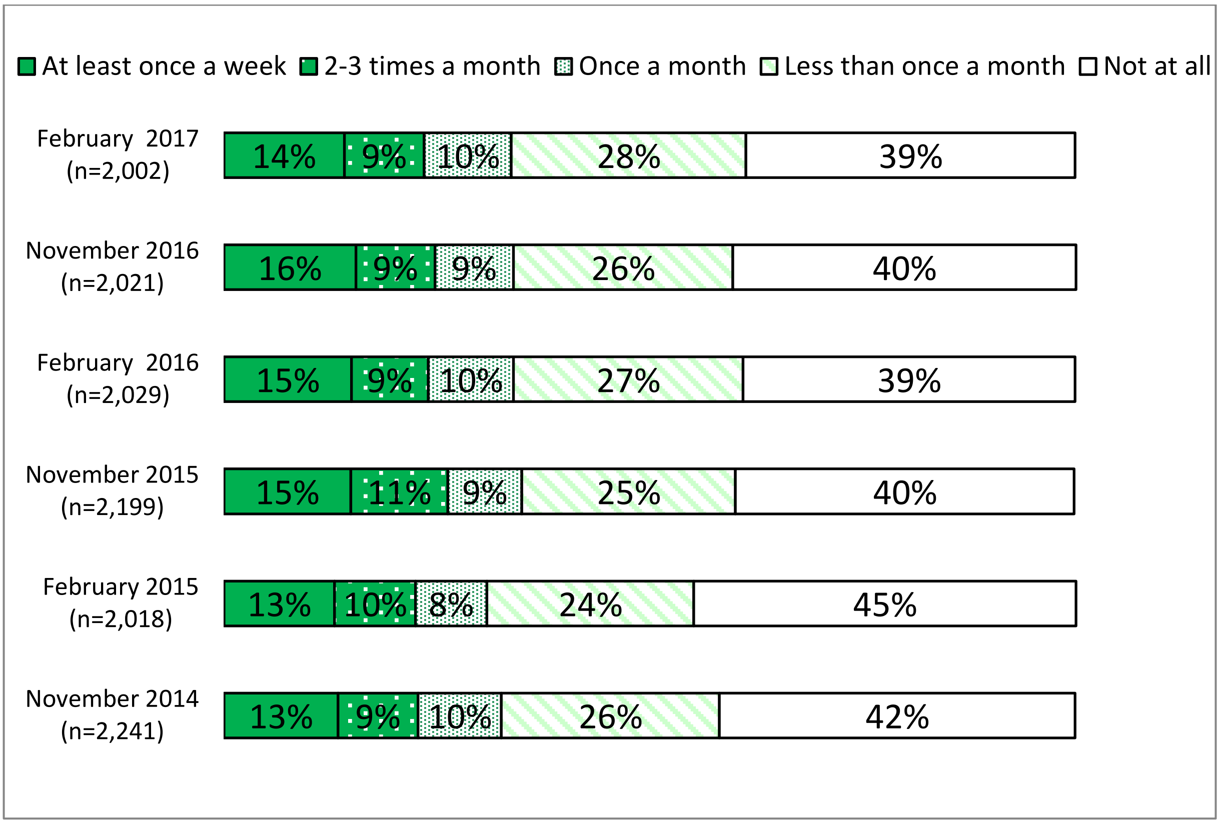
Q1. In the last six months I caught a taxi in Sydney....
5+ times a week / 3-4 times a week / 1-2 times a week / 2-3 times a month / Once a month / Less than once a month / Not at all. The first three codes have been summed and shown as at least once a week.

Taxi use in the total population

The stability of overall taxi use in the total adult population can be seen in Figure 5. Using a taxi once a week or more often in the last six months was reported by 13% to 16% of all respondents. The variation in the percentages reporting each frequency of use was generally within a range of 3 percentage points, except for February 2015 which showed a lower overall prevalence of taxi use (55% compared to 58% to 61% in other survey Waves).

The variations are consistent with chance producing differences in the results, even given the very large samples.

Figure 5. Frequency of taxi use among all respondents in the past six months by survey Wave



Q1. In the last six months I caught a taxi in Sydney….
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. The first three codes have been summed and shown as at least once a week.

Taxi use and use of other point to point modes

The report on the November 2016 survey identified a number of variables that influence the use of taxis. One of the strongest was that those who use other modes of paid point to point transport are more likely to use taxis. Breakdowns of taxi use by frequency of use of each of the other modes indicated that the more often another mode is used, the more often a taxi is used.

The same relationships are confirmed in the February 2017 data, as can be seen in Figure 6.

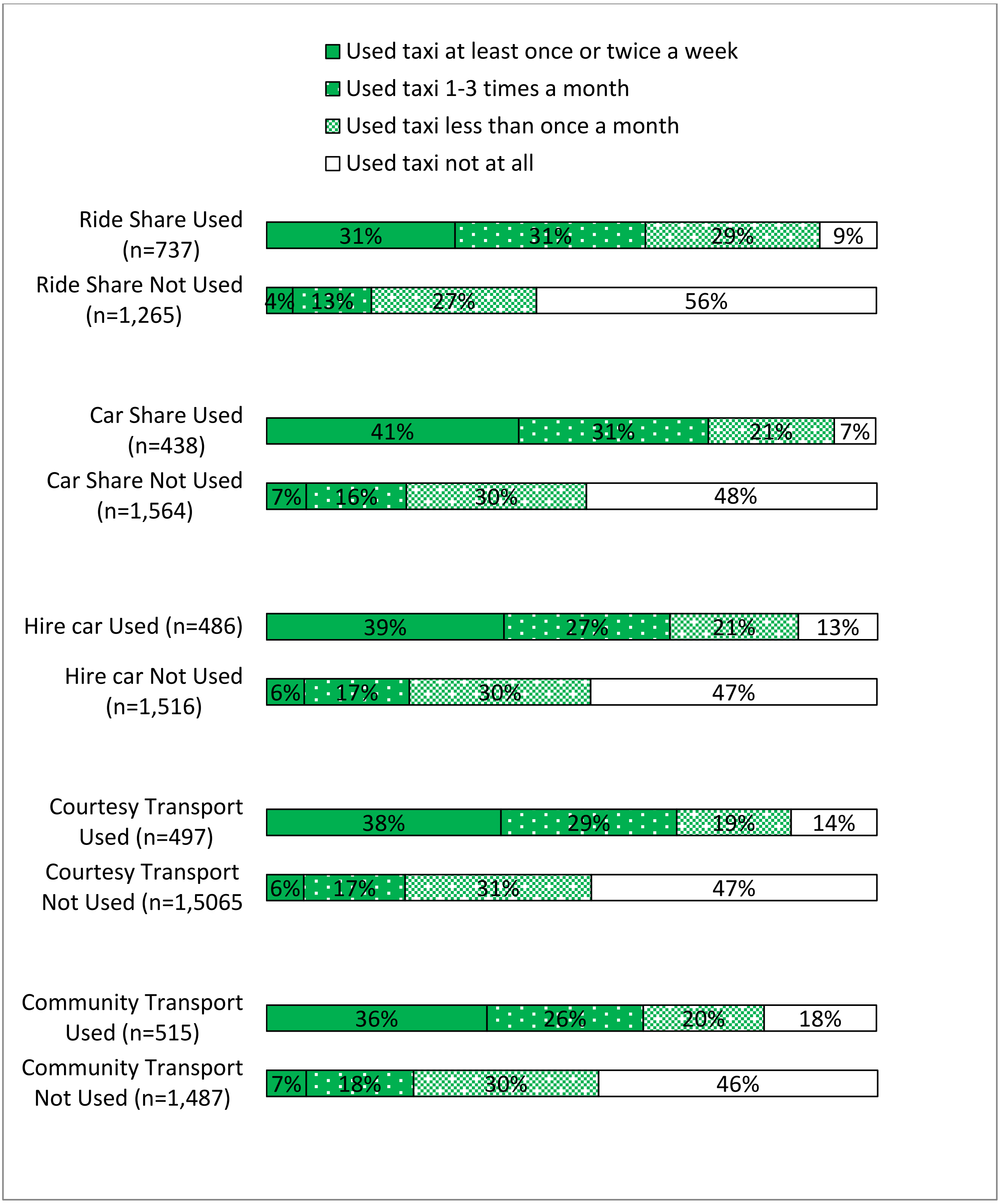
For each of the other modes of point to point transport, the differences in the prevalence of taxi use in the past six months between users and non-users of the other mode are substantial, ranging from 28 percentage points for community transport to 47 percentage points for ride share.

Among taxi users, the differences in frequency of use between those who use each other mode and those who do not are also substantial. Among taxi users, 34% of those who also use ride share report using a taxi at least once a week, compared to only 10% of taxi users who have not used ride share, a difference of 24 percentage points.

Among taxi users, the differences between those using another mode and those not using is even larger for the other modes, ranging from 32 to 34 percentage points. Among taxi users who have used a particular mode other than ride share, 44% to 45% report using a taxi at least once a week, compared to 11% to 12% of taxi users not using the other mode.

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

Figure 6. Frequency of taxi use in the past six months: November 2016 and February 2017 by whether used other point to point modes



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

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 past six survey Waves are shown in Figure 7.

Respondents are slightly more likely to report their use of taxis has decreased than to report their use of taxis has increased. The difference of four to nine percentage points in the percentage reporting increased use over the percentage reporting decreased use is not statistically significant in any one year, but would be significant if the six survey Wave samples are combined. This pattern is also consistently seen in the 2013 and 2014 Urban Sydney results. Slightly more people believe they have reduced taxi use than believe they have increased taxi use. Despite this, there is no evidence of decreased prevalence or frequency of use.

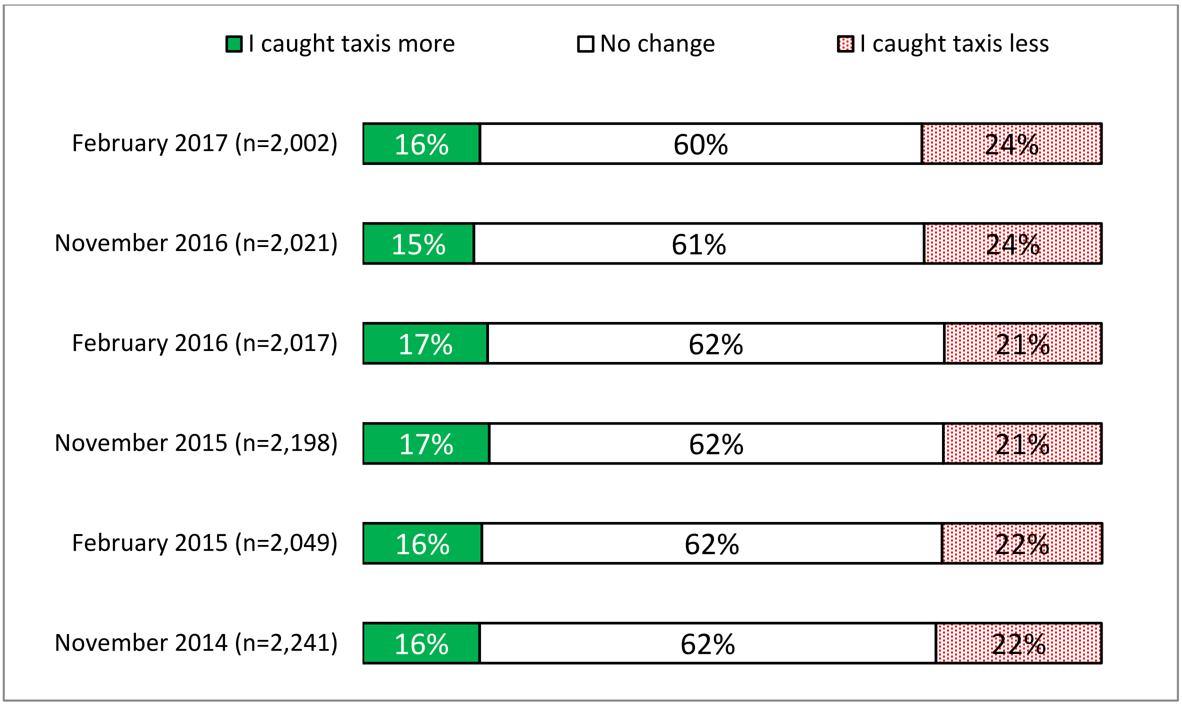
There are no differences between the samples large enough to suggest real differences over time in the perceived trend of use.

In each survey Wave, heavy users of taxis are more likely to believe their use is increasing, while light and non-users are more likely to believe their use is declining or that it has not changed.

Results for this question must be treated with caution. It is logically inconsistent for anyone to report increased use in the past 12 months and to say they have not used a taxi in the past six months. In every survey Wave, some respondents gave this combination of replies. Clearly answers to the trend question are not completely reliable reports of actual change in use.

Some who report increased use might do so simply because they have used taxis quite often, and believe that this must represent an increase in use, while others who make little use of taxis assume that they must have decreased use. Answers to both the question about frequency of use and the question about change in use cannot be taken as based on exact recall of the actual number of trips taken. Rather they indicate impressions about the level of use. While the replies will be related to the actual level of use, they cannot to be taken as accurate counts.

Figure 7. Change in frequency of taxi use – past year from previous year by survey Wave



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

4.4. Frequency of ride share and car share use

The reported frequency of using ride share services (see Figure 8) and car share services (see Figure 9) among those who have used these services show quite different patterns over time.

The percentage of users who report using ride share services once a week or more often has declined as the prevalence of use has increased, falling from 35% to 39% in the first three survey Waves down to 30% to 33% in the three most recent survey Waves. The shift in the total percentage of users reporting they use ride share services more than once a month has declined somewhat more, from 66% to 67% in the first two survey Waves down to 52% (November 2016) and 49% (February 2017) in the two most recent waves.

While there are considerable variations in the frequency of using car share services reported by car share users, these shifts show no clear pattern over time, and are clearly not “seasonal”.

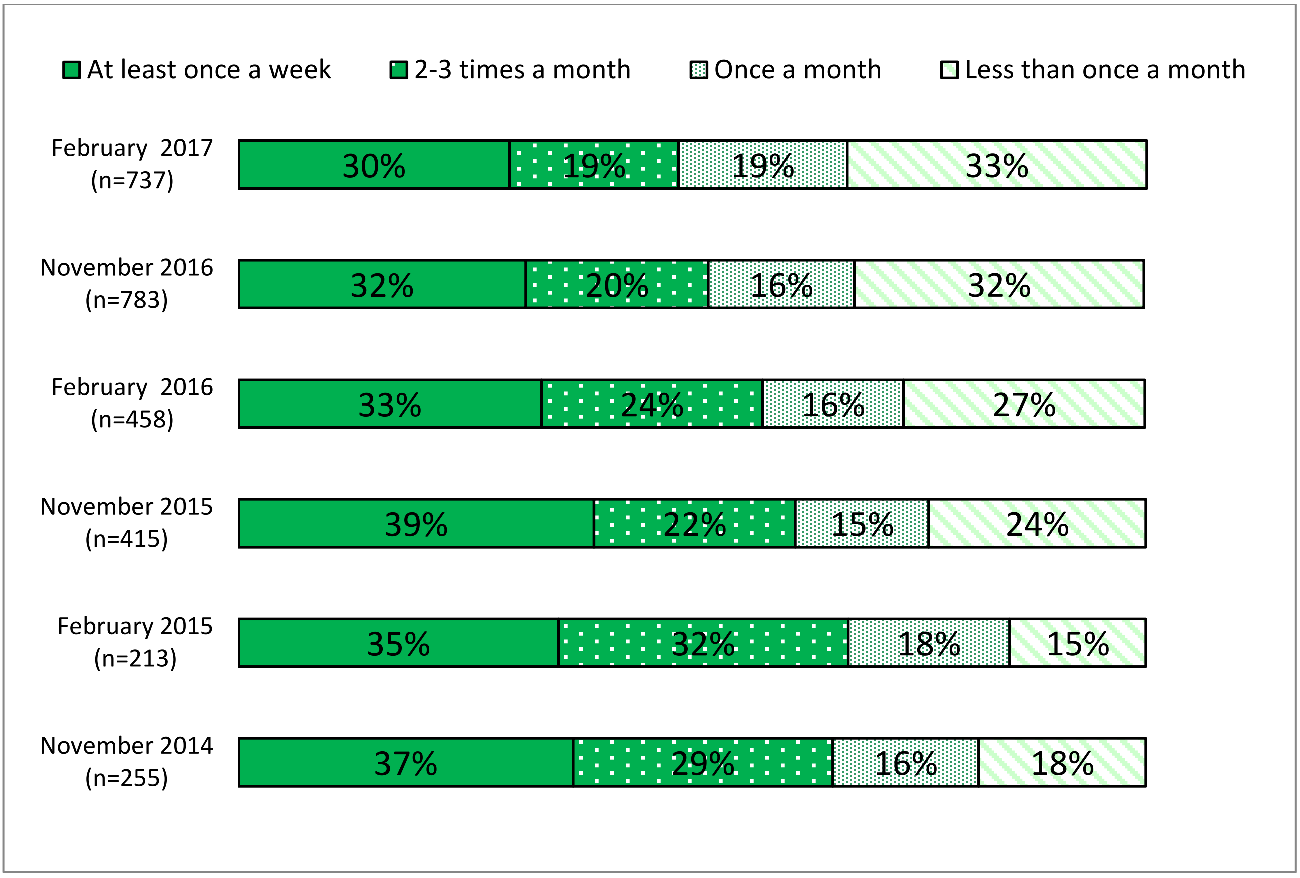
The difference in the percentage of car share users reporting they use the service more than once a month shows only small changes (zero to five percentage points) except in two survey Waves. From Figure 1 it can be seen that the prevalence of ride share use was clearly higher than car share use since February 2016 (by 5 to 15 percentage points).

Comparing these results back to those shown in Figure 4 for taxi use, ride share users were more likely to report use at least once a month in the first two survey waves, and have remained slightly (but not significantly) more likely to report using at least once a month in every wave.

The percentage of car share users reporting use at least once a month fluctuates, being sometimes above and sometimes below the percentage of taxi users who report using this often.

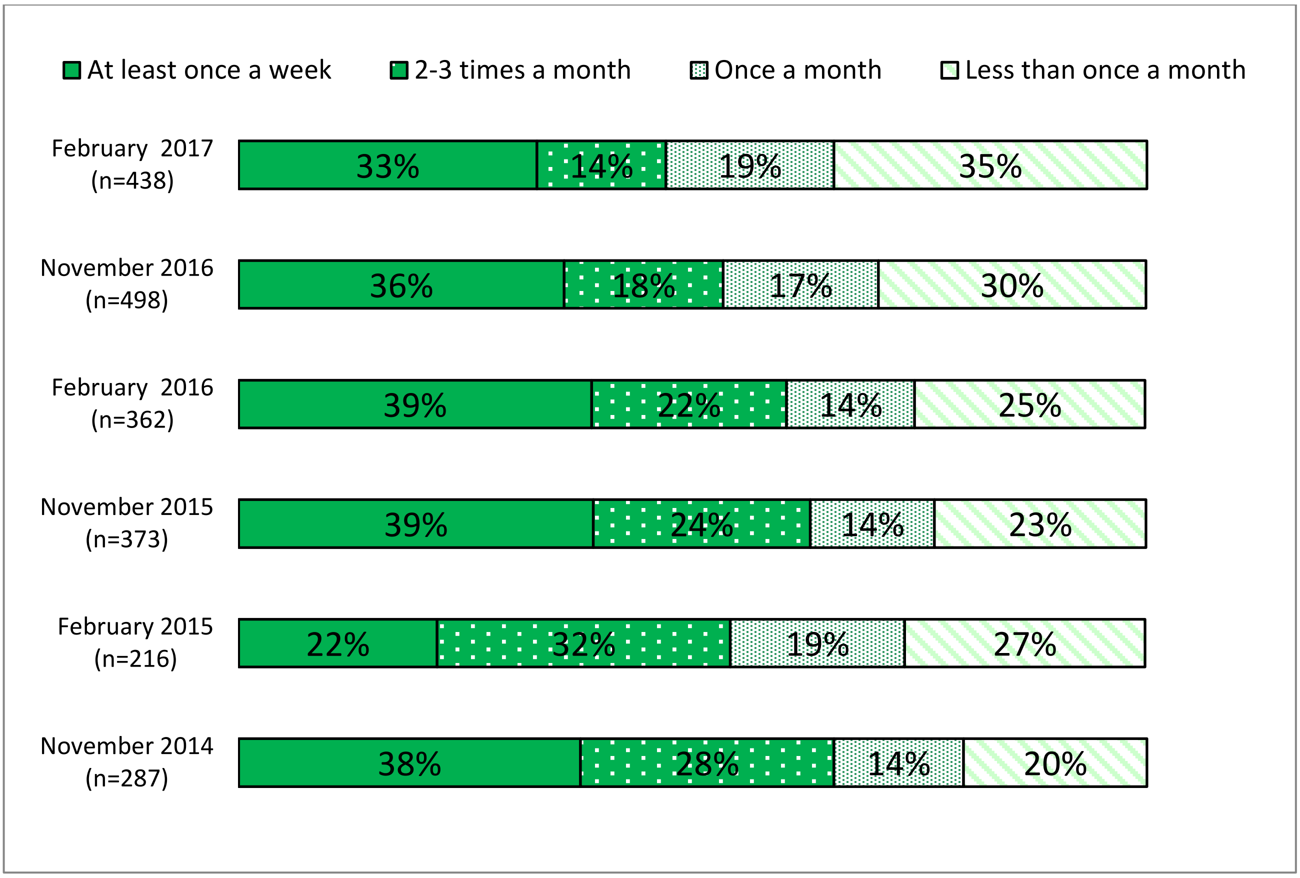
We can conclude that users of ride share and users of car share services show similar and possibly slightly more frequent use of that service than taxi users.

Figure 8. Frequency of ride share use in the past six months by survey Wave



Q49. In the last six months I have used a ride sharing service (for example, UberX or RideSurfing) …

Figure 9. Frequency of car share use in the past six months by survey Wave



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

In every survey Wave, those who report more frequent use of taxis are likely to report more frequent use of ride share and of car share services.

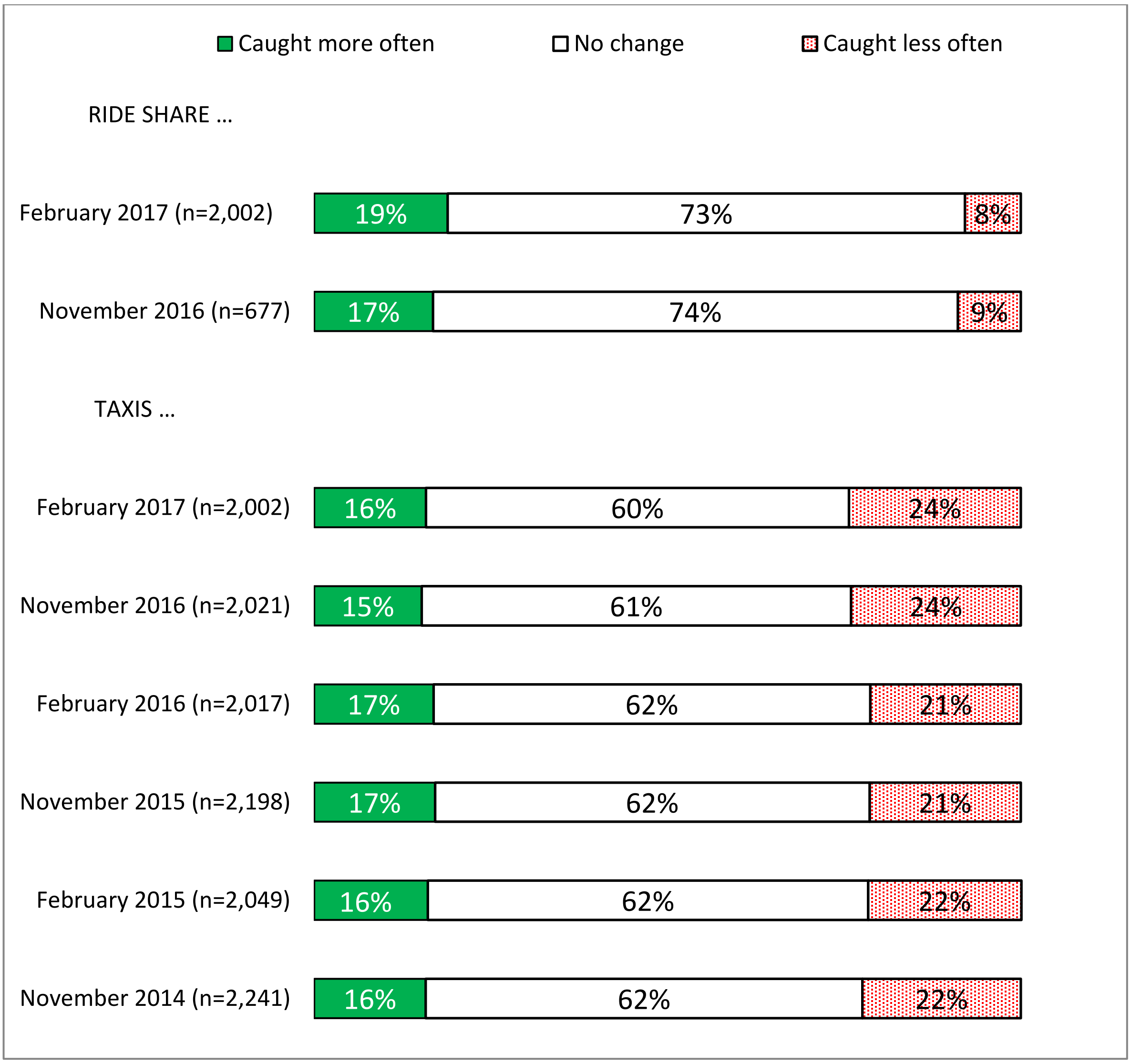
If these reports are accurate, it appears that those members of the population who have a need for paid point to point services have increased their total frequency of use by adding additional journeys using the alternative modes, rather than replacing taxi use by use of the newer alternatives.

All respondents in the two most recent survey Waves were asked if they have caught ride share services in the past 12 months more often, less often or not changed their use of ride share services compared to the previous 12 months.

Figure 10 shows the distribution of replies to this question, with results for the equivalent question for taxis shown to facilitate comparison.

Consistent with the growth in prevalence of ride share services, which should produce more people who have started use in the past 12 months than have stopped or reduced use, significantly more ride share users in both Waves report using more rather than using less. This is the reverse of the pattern seen for taxis in every survey Wave.

Figure 10. Change in frequency of using ride share services and taxis by survey Wave (Total sample results)



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

It is useful to examine reported change in use of ride share services and of taxis among those who use that service. Figure 11 shows the results for the November 2016 and February 2017 survey Waves when the question about change in use was asked for ride share services.

Users of ride share services are much more likely to report increased use (47% to 48%) than decreased use (18% to 20%).

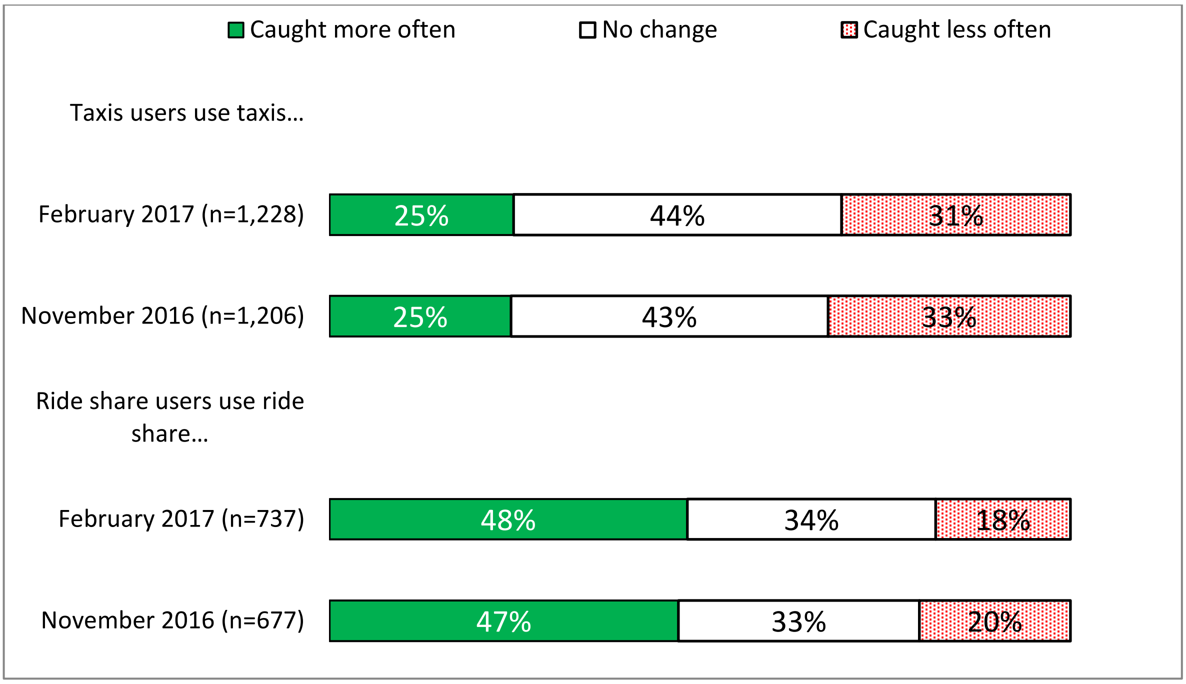
Users of taxis are slightly less likely to report increased use (25% in both survey Waves) than decreased use (31% to 33%).

Users of ride share services are almost twice as likely to report increased use than are users of taxis (47% to 48% compared to 25% for taxis).

Users of ride share services are much less likely to report decreased use (18% to 20%) than are users of taxis services (31% to 33%).

This analysis confirms that responses to these items are consistent with increased use of ride share services. It also suggests that the increased use is probably due to new users rather than to existing users doing so more often.

Figure 11. Change in frequency of using ride share services and taxis Feb 2017 and Nov 2016 (Amongst Users only)



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

5. Taxi use beliefs, behaviour and attitudes

This section of the report summarises the results of items asking about other aspects of respondent behaviour, beliefs and attitudes about taxi use.

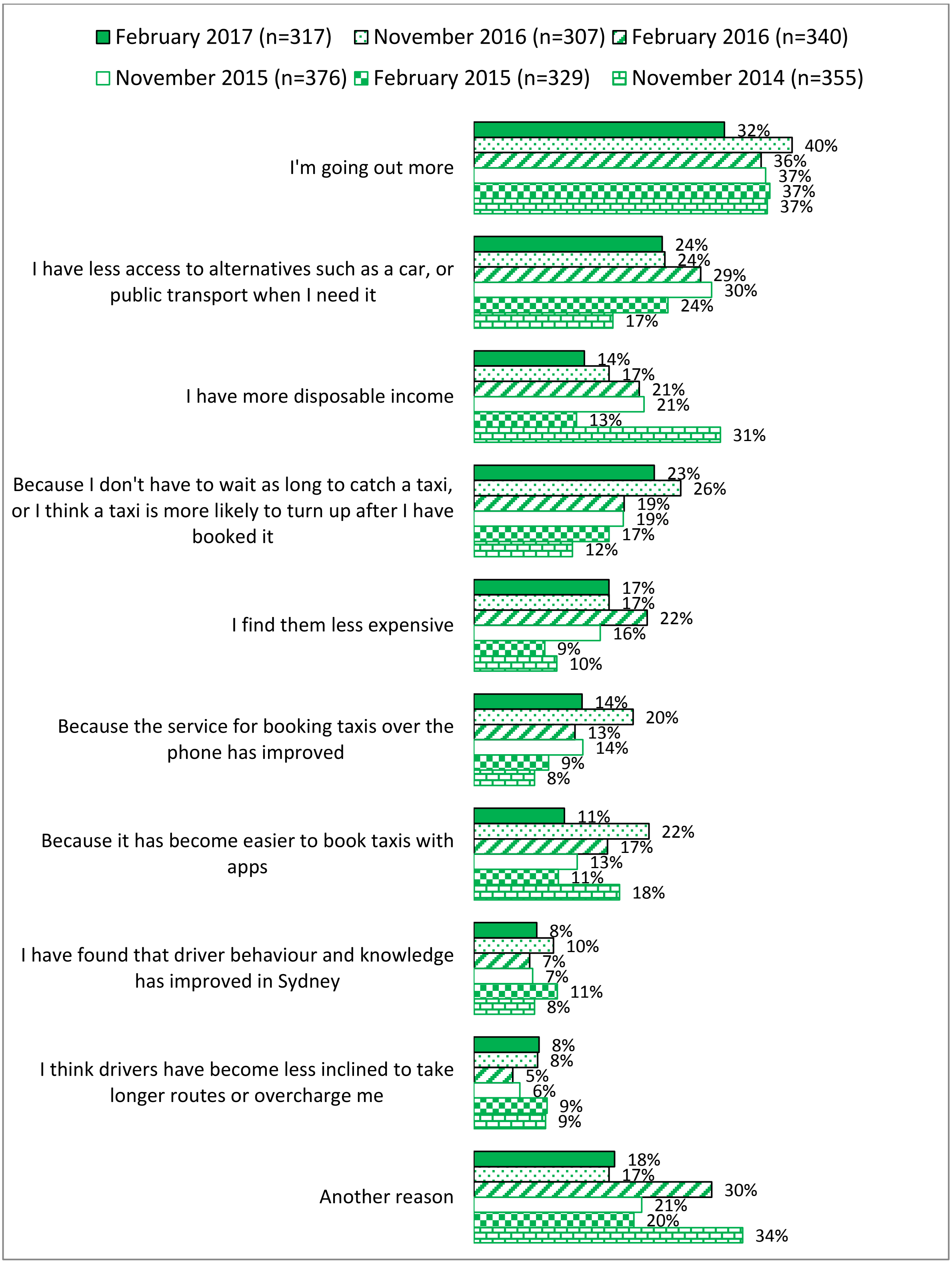
5.1. Reasons for change in use

In each survey Wave, those who reported increased taxi use in the past 12 months compared to the previous 12 months were asked to endorse all the reasons for this change from a list of suggested reasons (see Figure 12). Some of the fluctuations in replies to this question might be due to differences in the willingness of respondents to endorse multiple reasons.

Need (going out more or reduced access to alternatives) is the main explanation for increased use. Increased capacity to pay has declined as an explanation.

A range of improvements in the service provided by taxis are also endorsed but at lower levels. Another 17% to 34% had a reason not included in the prompted list.

Figure 12. Reasons for increased frequency of taxi use by survey Wave



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

Figure 13 shows that in each survey Wave, among those who reported they use taxis less, increased cost is the most widely endorsed reason for reduced use followed by reduced need (going out less, better access to a car, improved public transport at the times when it is needed) and reduced capacity (lower disposable income).

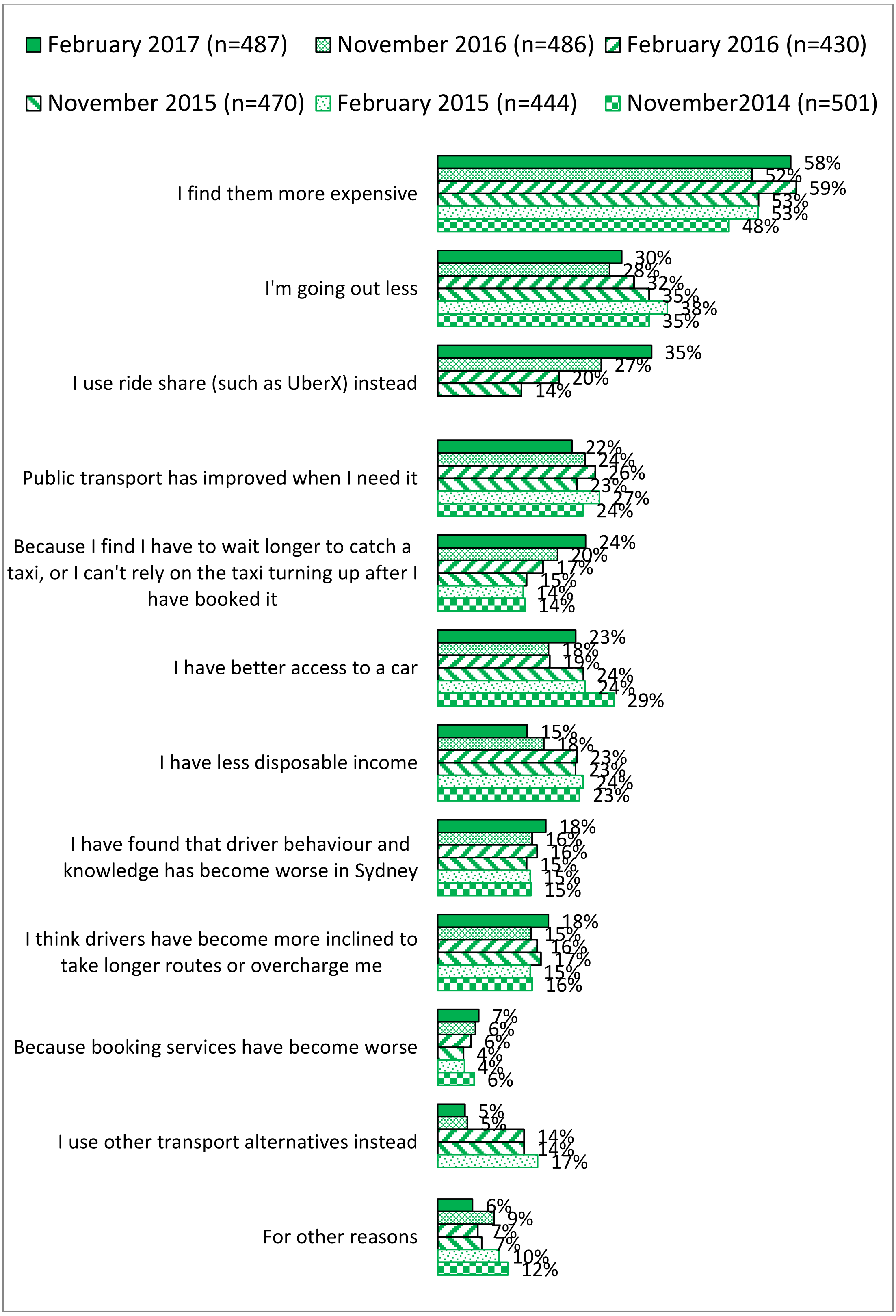
Few indicated they had other reasons apart from those listed (6%-12%).

Being more expensive is more likely to be selected by the February 2016 and February 2017 respondents (58% to 59%) than in the other survey Waves (48% in November 2014 and otherwise 52% to 53%). Only the difference between November 2014 and the February 2016 and February 2017 survey Waves are statistically significant and given the number of observations being compared, this could have occurred by chance. There does appear to be a consistent trend for the results in the February survey Waves to be somewhat higher than in the November survey Waves (by five to six percentage points), so this might be a ‘seasonal’ effect. However, despite the consistency it is not large enough to draw a confident conclusion.

Use of Ride Share services such as UberX is selected by a steadily growing percentage of respondents (up from 14% in November 2015 when this explanation was added to the list, to 35% in February 2017). This change is statistically significant.

No other changes approached being statistically significant or large enough to merit comment.

Figure 13. Reasons for decreased frequency of taxi use by survey Wave



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

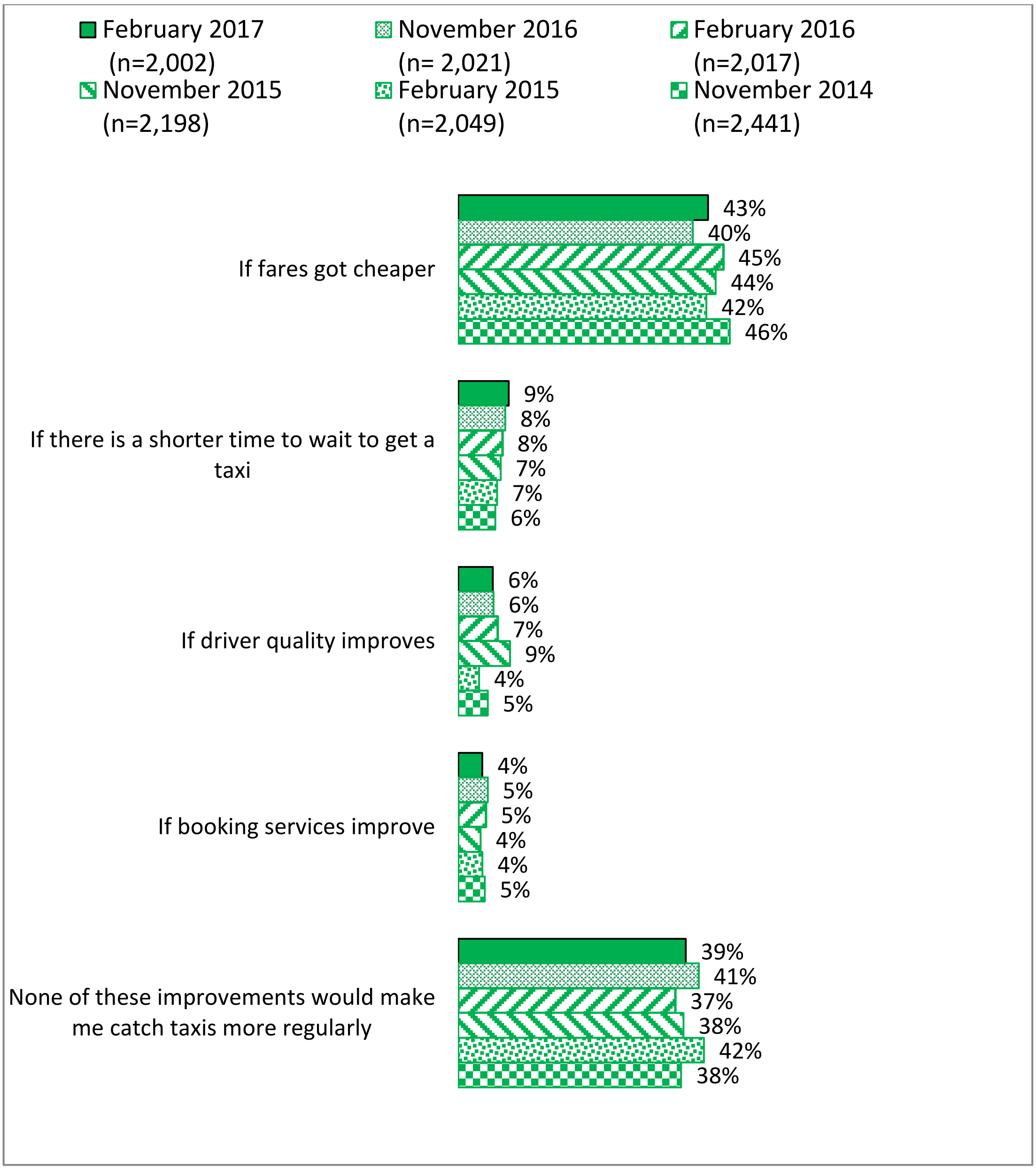
5.2. Future use

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 14).

"If fares got cheaper and “None of these” are by far the most often endorsed for all Waves. Reduced waiting times, improved driver quality and improved booking services are each considered by 4% to 9% to be the most likely to persuade them to make more regular use in future.

While there are some shifts in the percentages endorsing each option the order of selections is the same in each wave. There are no consistent trends over time.

Figure 14. Most likely to increase taxi use in the next year by survey Wave



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

5.3. Use of taxis for work

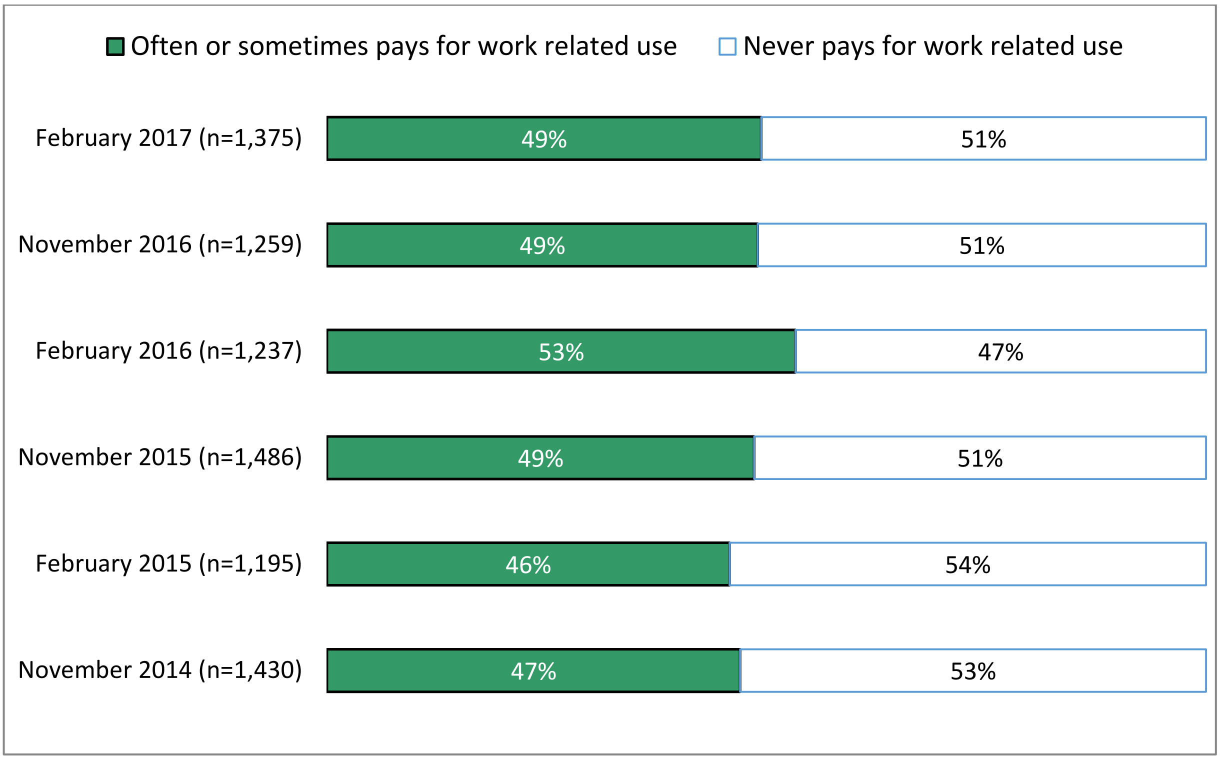
Those who engage in paid work were asked whether their workplace covers the cost of using a taxi for work purposes, and whether they are allowed to use a taxi paid for by their workplace more, the same or less than in the previous 12 months.

Figure 15 shows the results for each of the six survey Waves. Between 46% and 53% of those who are in paid employment say their workplace often or sometimes pays for work related use of taxis. There is no consistent “seasonal” pattern and no clear trend for the percentage to increase or decrease, with the highest result in February 2016 and the lowest in February 2015.

In all samples, most (64% to 73%) report that being allowed to use a taxi for work purposes has not changed (see Figure 16). Although the balance between those reporting allowed use has increased and allowed use has decreased shifts somewhat, for the past four waves the percentage reporting that this is more often allowed is slightly larger than the percentage reporting allowed use has decreased.

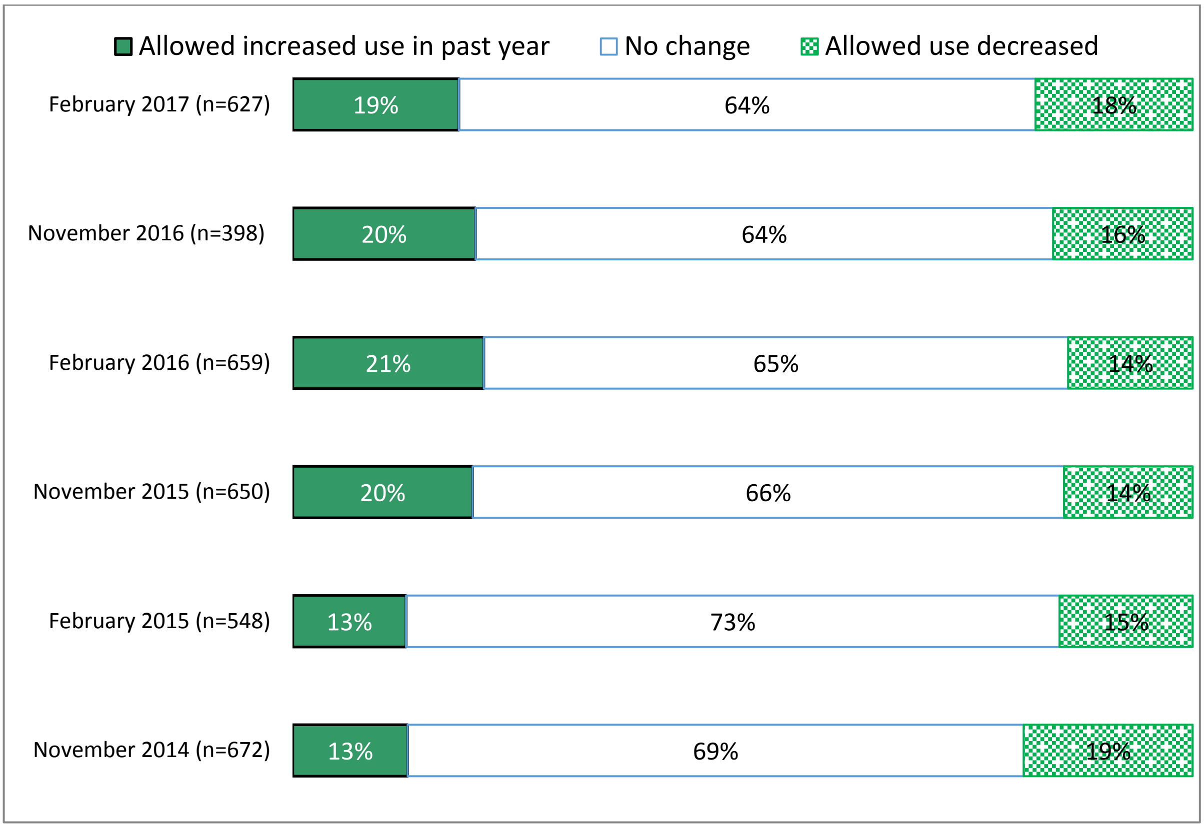
There is no clear pattern either seasonal or for a long term change in responses to this question.

Figure 15. Workplace taxi use policies by survey Wave



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

Figure 16. Trend in workplace taxi use policies by survey Wave



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

5.4. Whether waiting times reasonable

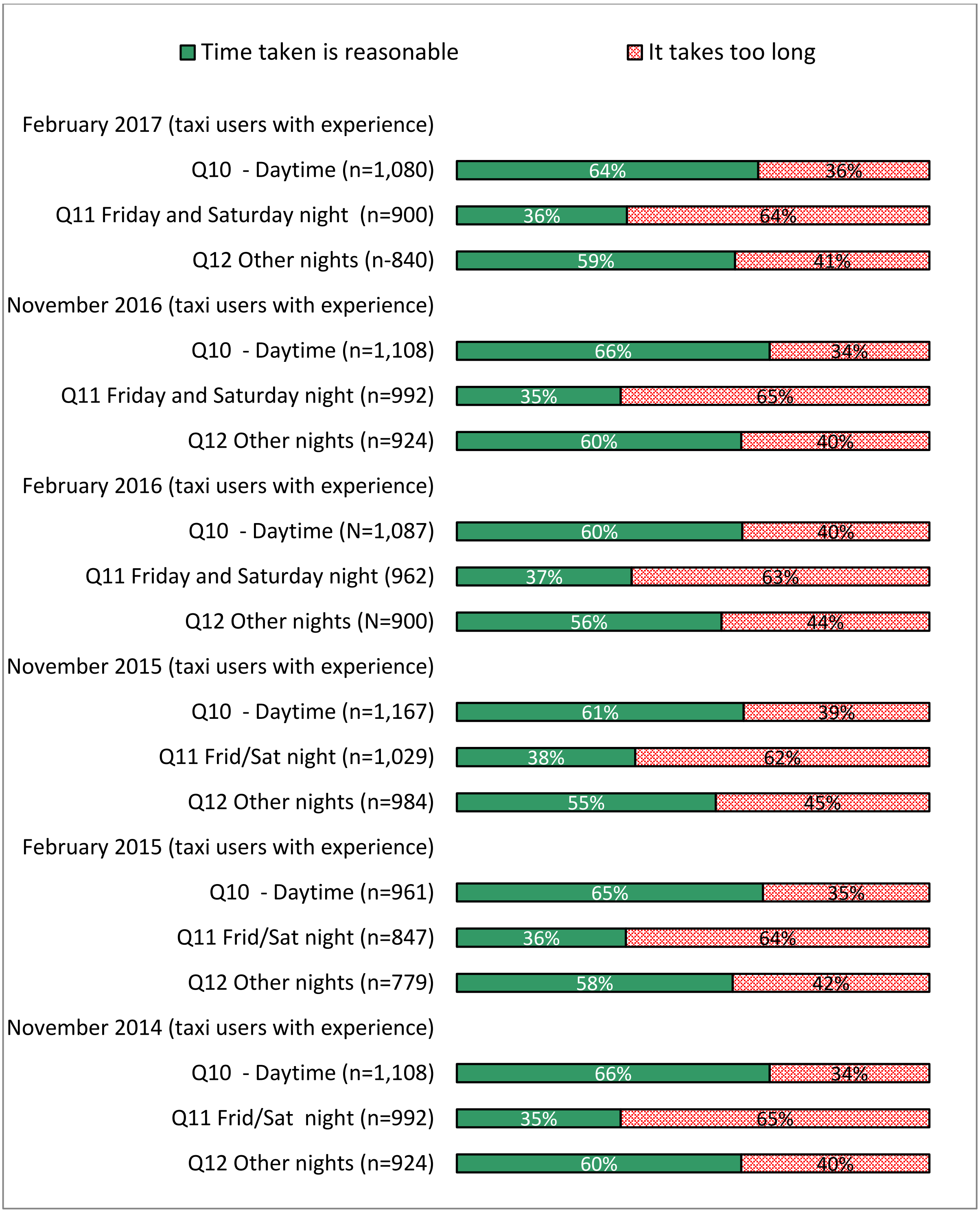
Respondents were asked whether they considered the time taken to get a taxi at different combinations of time of day and day of week was reasonable.

Figure 17 shows the distribution of replies in each survey Wave for respondents who had used a taxi at the relevant time.

The results for each time period vary very little across the Waves of the survey.

The time period has a marked effect. Respondents are much less likely to believe the waiting time on Friday and Saturday night is reasonable (35% to 38%) and much more likely to consider it is unreasonable (62% to 65%) than the waiting time on other nights (55% to 60% thought these times reasonable, and 40% to 45% considered them unreasonable). Waiting times in the daytime are the most widely considered reasonable (60% to 66%) and least likely to be considered unreasonable (34% to 40%). There is a strong community perception (consistently noted in earlier surveys) to believe waiting times on Friday and Saturday night are unreasonable while on other nights and especially daytimes waiting times are reasonable.

Figure 17. Whether taxi waiting times considered reasonable, by time and day and survey Wave



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
Bases exclude those replying " I'm not sure because I haven't tried to catch a taxi [AT THAT TIME]"

5.5. 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 18.

This allows estimation of the prevalence of being unable to get a taxi when one was wanted.

Figure 19 shows the prevalence of being able to get a taxi the last time a respondent had **wanted** a taxi, and the reasons for being unable to get one for each survey Wave.

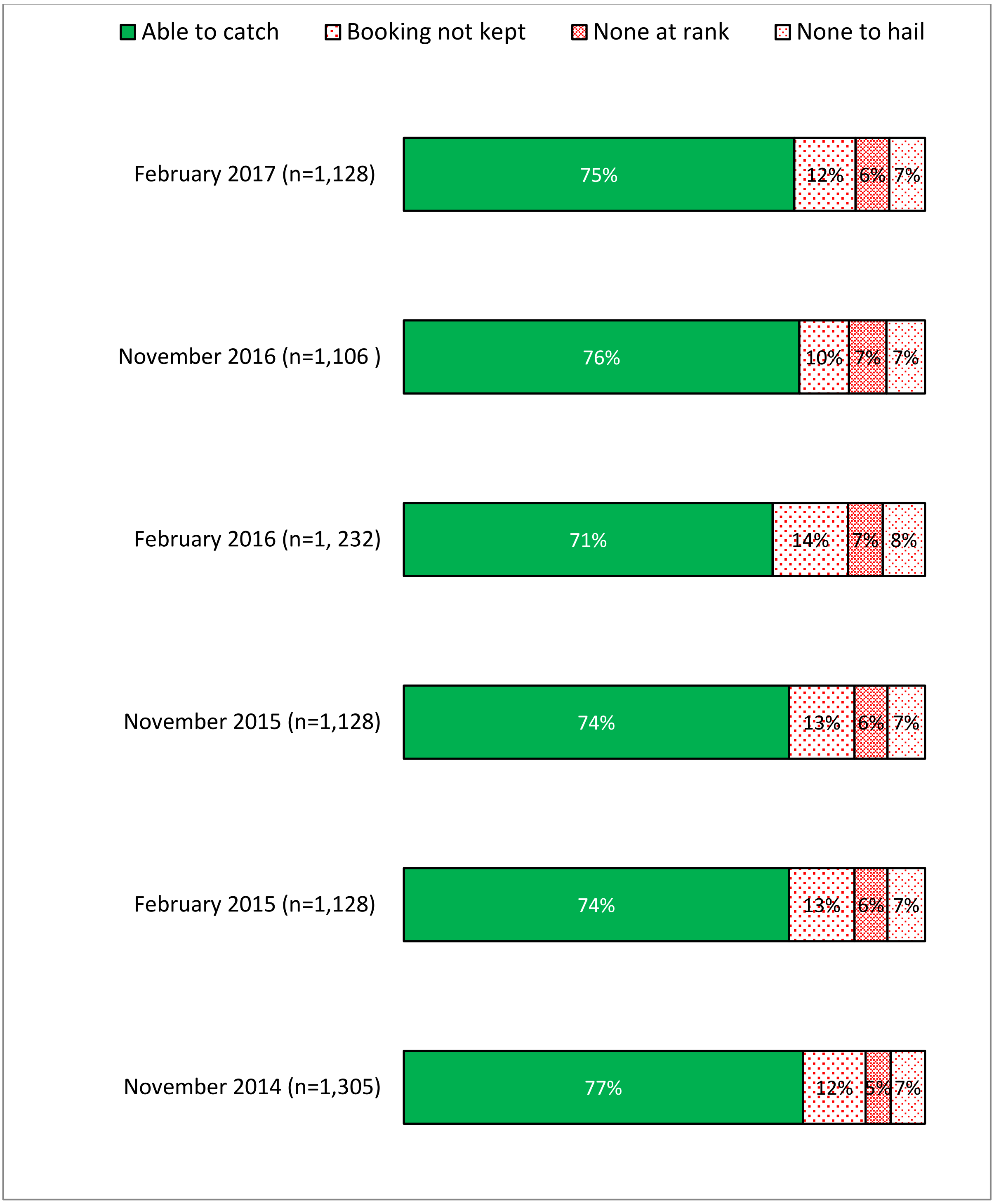
Taxi users unable to get a taxi

The majority of Urban Sydney taxi users are able to get a taxi the last time they tried (71% to 77%; see Figure 18).

The reasons given for being unable to get a taxi are a taxi not turning up as booked (12% to 14%), being unable to find a taxi when trying to hail one from the street (7% to 8%), and not being able to find one at a taxi rank (5%to 7%). There is little variation in this across the survey Waves or by where the journey started.

It appears that among taxi uers, taxi availability is very stable and varies only a little by how people try to obtain the taxi.

Figure 18. Being able to get a taxi when wanted one and reason for inability if unable by survey Wave



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

Reasons unable to take a taxi when tried – total sample

All respondents were asked if they had at any time in the last six months considered taking a taxi but in the end did not (Q30). Those who replied that this had happened were asked if they did not take a taxi because they changed their mind or because they could not get one (Q31). Those who reported in response to Q31 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 take a taxi on that occasion (Q33a). The responses offered in Q31a differed from those in Q13 which asked about the last time taxi users had tried to get a taxi. Different people answer the question, as it included any unsuccessful attempt to obtain a taxi in the past six months, not just being unsuccessful on the last attempt.

The percentage who reported being unable to take a taxi when they had tried to do so showed no consistent or significant variation across these survey Waves, ranging from 10% to 14% of the total samples, based on replies to Q30 and Q31. Among taxi users, the percentages varied from 15% to 20%[1].

Figure 19 shows the percentages giving each of the prompted replies to Q33a for each survey Wave.

Any apparent differences in the percentages reporting different reasons for not obtaining a taxi might be due to differences in the ways that people in the six survey Waves had tried to obtain the taxi when they had been unable to obtain one.

None of the individual reasons for not being able to get a taxi is widespread among all taxi users, each affecting 5% of less of the total sample. Among those who have used a taxi in the past six months (data not shown), each reason was given by 7% or less of taxi users.

Very few of those asked (4% to 6%) reported that they had tried to take a taxi and the driver refused to take them when told the destination. These respondents form less than 1% of those who have taken a taxi in the past six months.

Booking a taxi that then fails to turn up is a more common issue in all Waves, ranging from 29% to 36% of those who had at least once not been able to get a taxi, but 5% or less of all those who had used a taxi.

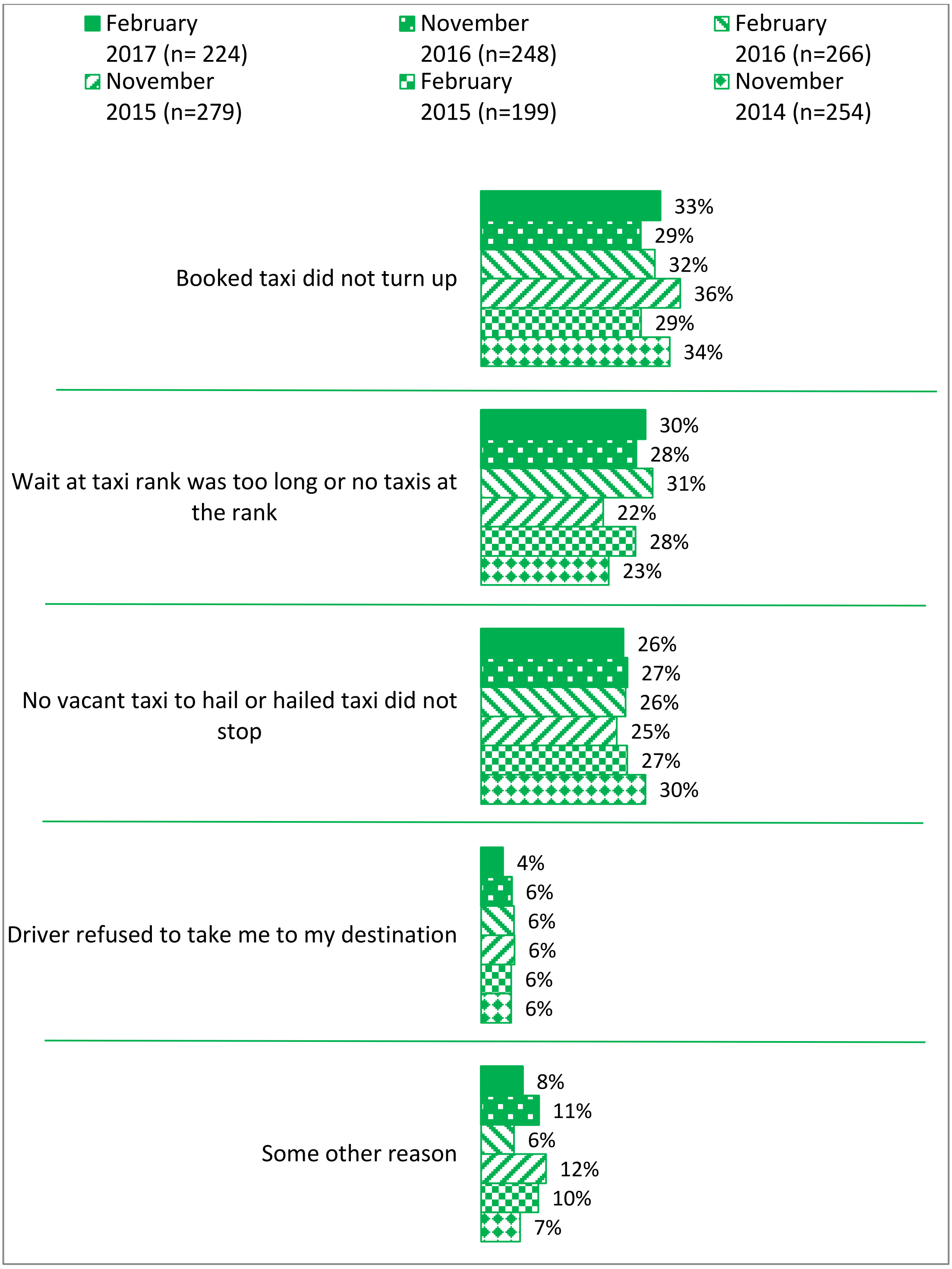
The main conclusion is that the problem does occur, but is experienced by only around 20% of taxi users in any six month period. Note this is not 20% of users on every occasion a taxi is sought – around 20% have experienced the problem at least once in a six month period, and a

[1] Note that the percentage of those not using a taxi in the last six months who reported this was only 3% to 4%, as most had never thought about obtaining a taxi and others had not tried despite thinking about doing so.

few who have experienced the problem might as a result have not used a taxi in the past six months.

Variations across survey Waves in the reason for not taking a taxi are not large and do not have any obvious interpretation.

Figure 19. Reasons did not take a taxi when tried to do so by survey Wave



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

5.6. Reasons decided to 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 20 led to their decision to not do so.

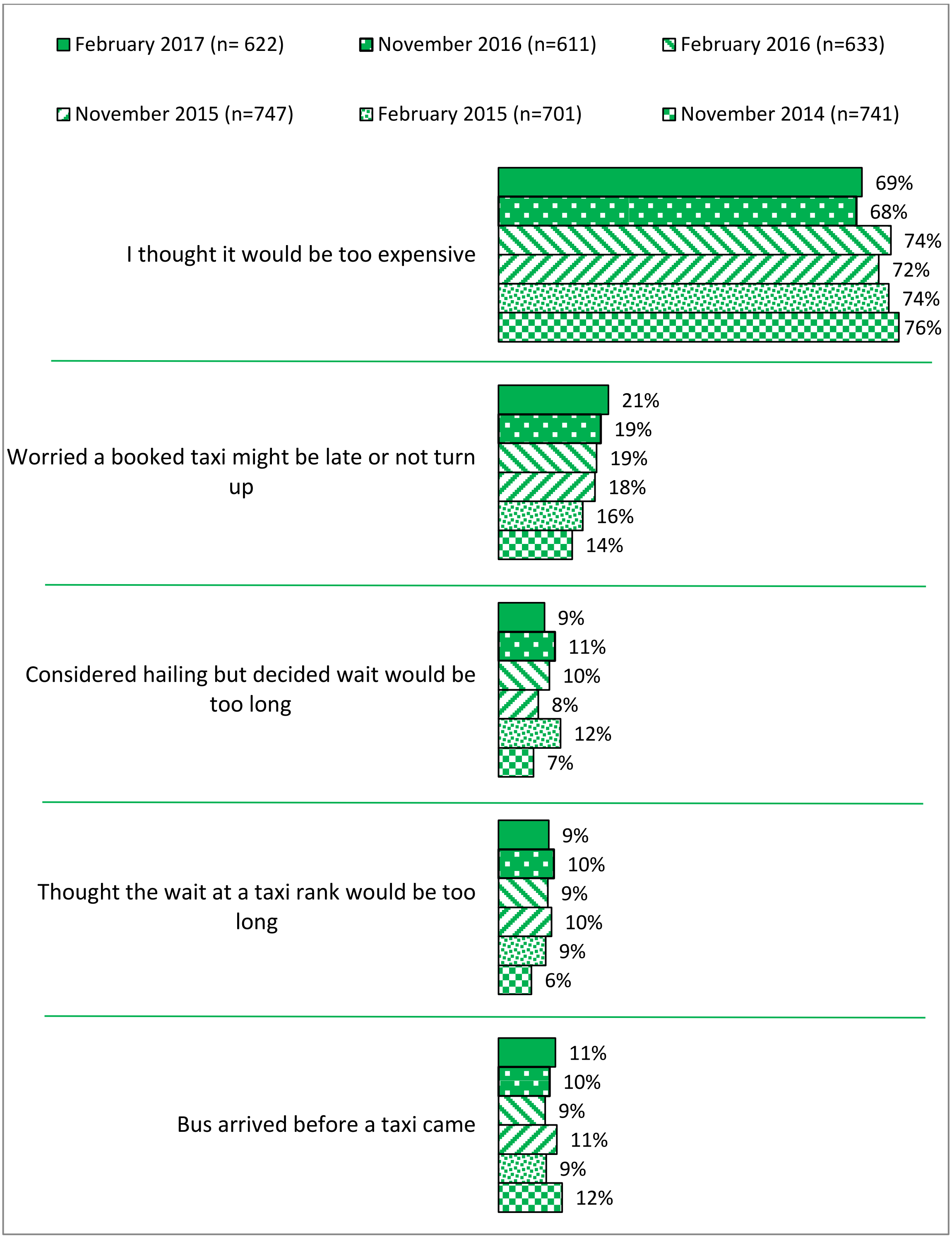
In each survey Wave, being too expensive is the most likely reason to be chosen: three or more times as often as any of the reasons connected to waiting time or a booked taxi not turning up or being late.

The percentage of the sample that had thought about taking a taxi but had not done so ranges from 30% to 34% across the six survey Waves showing almost no change.

There is very little variation across the survey Waves in the results on this item.

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

Figure 20. Reasons decided to not take a taxi by survey Wave



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

5.7. Action taken instead of taking a taxi

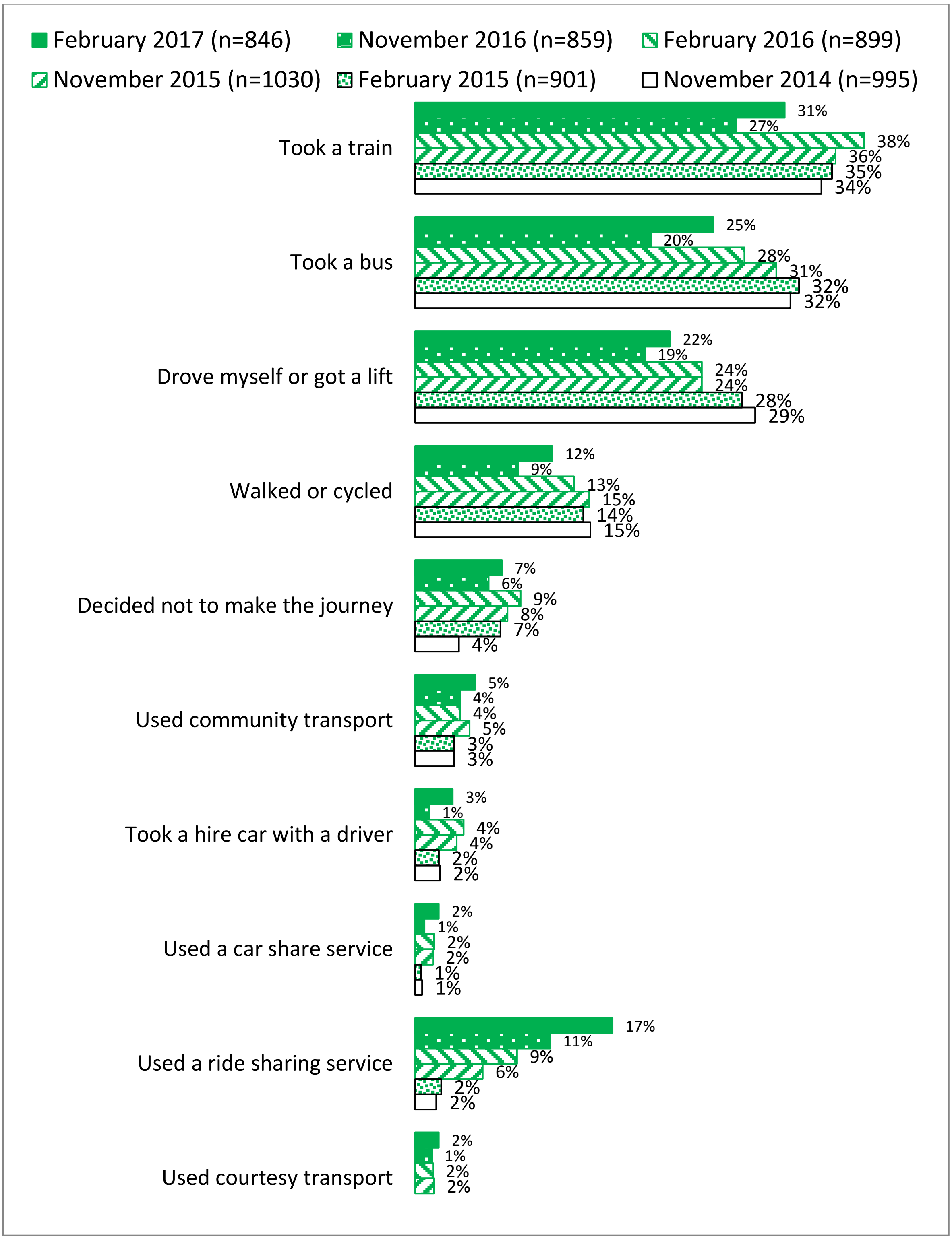
A substantial segment in each survey Wave recalled having considered taking a taxi in the past six months and deciding in the end to do something different or recalled being unable to get one. The percentage of the weighted total sample reporting one of these contingencies is slightly (but not significantly) higher in November 2015 (47%) than in February 2015 (44%) or February 2016 (45%).

The alternative action taken largely remained in the same order, but showed some consistent shifts across this 12 month period (see Figure 21).

Most (90% or more in all years) took the planned journey by another means, usually a bus or train or by driving. Some walked or cycled and a few (under 10%) decided to not take the journey at all.

While the differences between the survey Waves are small there is a consistent trend evident for the longer established modes other than taking a train (namely, bus, driving oneself, walking or cycling) to decline. Taking a train increased very slightly (from 35% to 38%) up to February 2016, then declined to 27% (November 2016) and 31% (February 2017). Using a Ride Share service such as Uber rose significantly from 2% to 17%, consistent with the strong increases noted in replies to other items. Use of other transport options show no consistent patterns to either rise or fall.

Figure 21. Action taken instead of taking a taxi by survey Wave



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

5.8. How taxi obtained

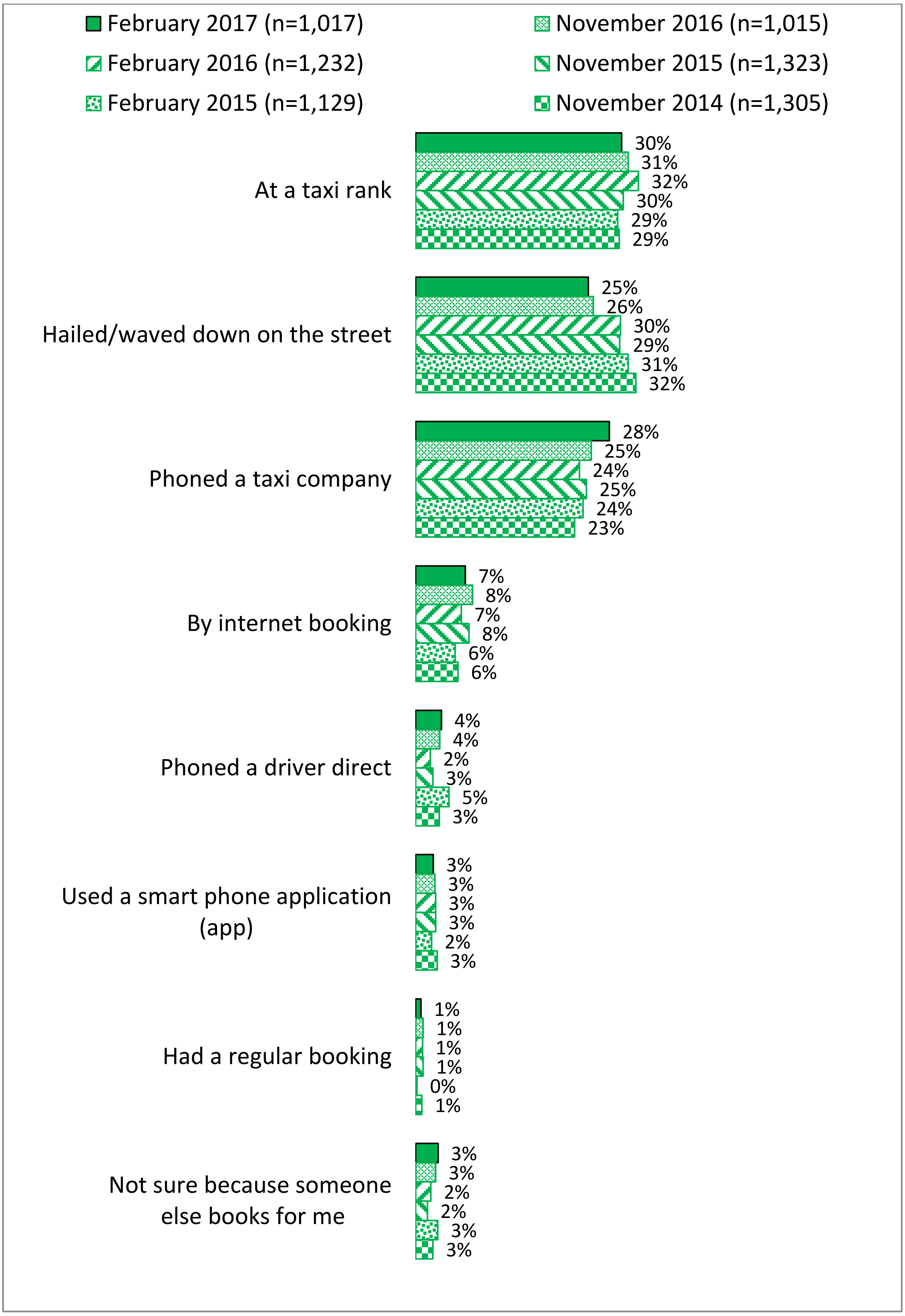
Replies when asked how the last taxi taken was obtained show very little change over time (see Figure 22). Despite the introduction of new channels for obtaining a taxi, the traditional methods of hailing a taxi on the street, taking a taxi at a taxi rank and booking a taxi by phone still dominate the methods used.

The prevalence of obtaining a taxi at a taxi rank has changed very little over the six survey Waves, ranging from 29% to 32%.

The prevalence of hailing or waving down a passing taxi in the street shows a slight but consistent trend to have decreased, from 32% to 25%. Balancing this, the prevalence of booking a taxi by phone shows a consistent but small trend upwards, from 23% to 28%. However, these changes are so small that, even with the relatively large samples asked these questions, the differences could be due to chance.

Of the newer methods of obtaining a taxi, internet bookings is the most prevalent, but still only reported by 6% to 8% of taxi users. Other methods are reported by 5% or less of taxi users.

Figure 22. How taxi obtained by survey Wave



Q22. I got the taxi …

5.9. Waiting time

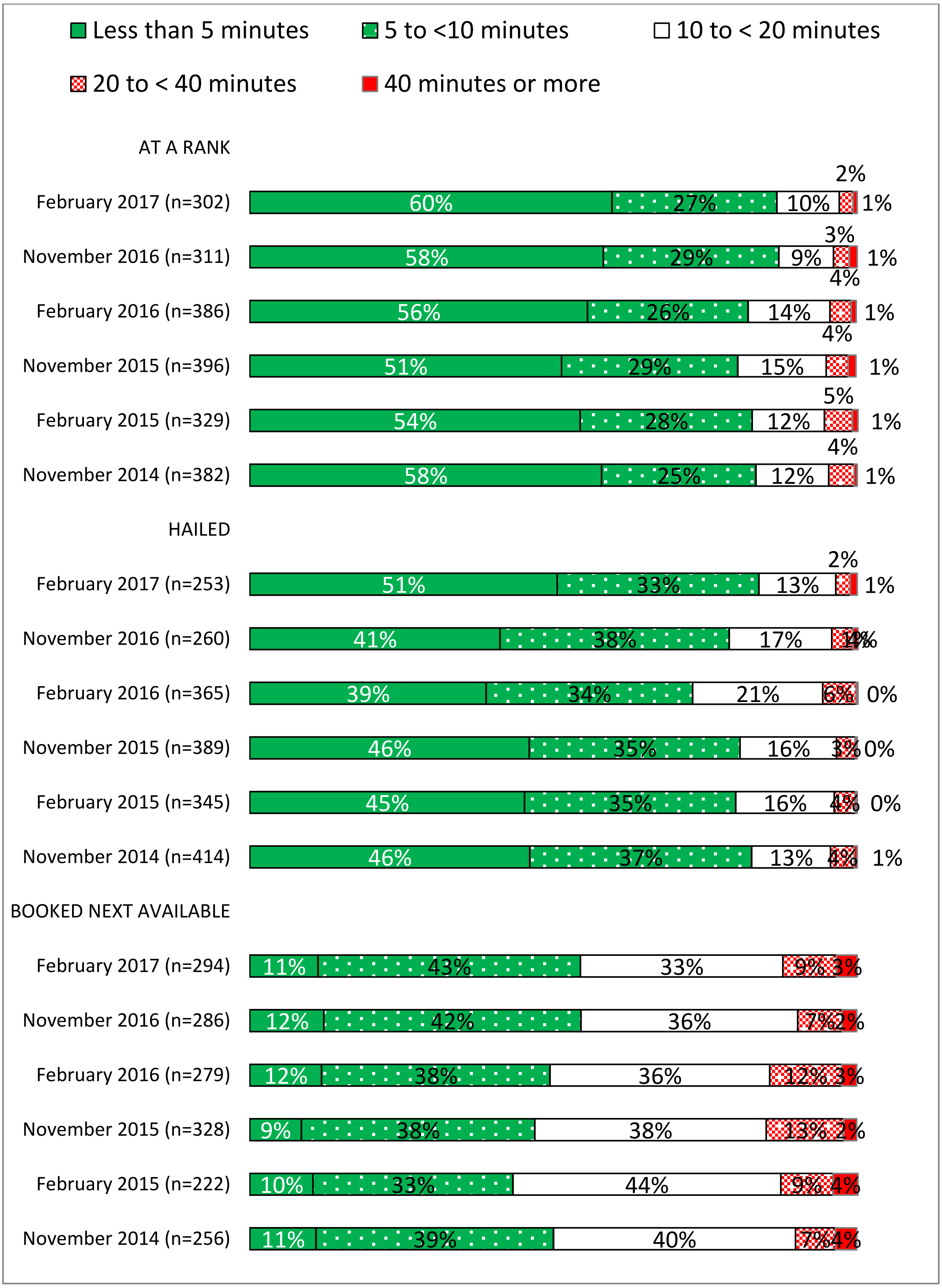
The time taken to obtain a taxi has been shown in every survey Wave to be longest when the next available taxi is booked, with booking for a particular time producing the shortest waits. The waiting time has shown some variation in waiting time between obtaining the taxi at a rank and hailing a passing taxi from the street, but which produces the shorter waiting times varies with the survey Wave and other variables, such as origin and destination. By far the strongest impact on waiting time is due to how the taxi is obtained.

There has been somewhat variable evidence that waiting times tend to be longer, once controlled for the method used to obtain the taxi, on Friday evenings and Saturdays. The number who report their last taxi was taken on a Sunday is so low that it has been difficult to draw firm conclusions about waiting times on Sunday.

Given the consistency of these findings and the complexity of the analyses required, reported waiting times are shown here by survey Wave but more detailed analyses are not reported.

Figure 23 shows the distribution of waiting times for each mode of obtaining the next available taxi (at a rank, hailing from the street and booking the next available taxi). Clearly, booking the next taxi available is more likely to take ten minutes or more, and obtaining a taxi at a rank is more likely to involve a wait of less than five minutes than hailing the taxi from the street.

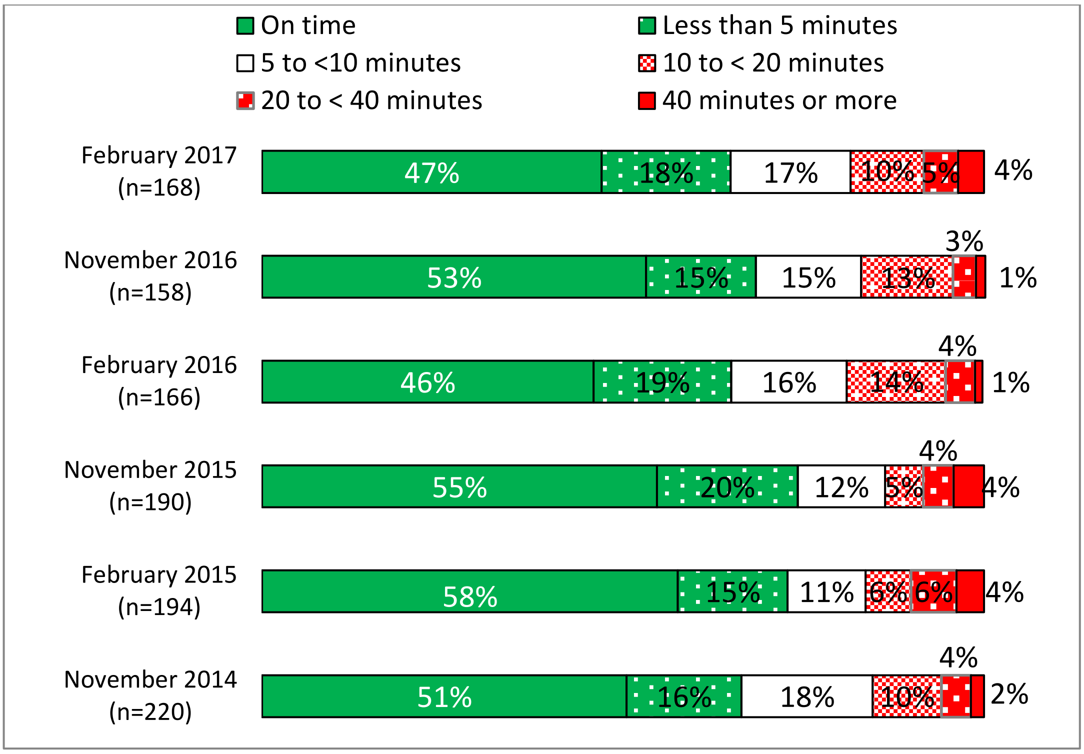
Figure 23. Waiting time by how taxi obtained by survey Wave



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

Booking a taxi for a particular time has the possibility of no waiting time, and so the rating scale for this method has "On time" as the first response option. Figure 24 shows that, largely due to those that turn up on time, 80% or more of taxi trips using this method to obtain the taxi involved waits of less than ten minutes. Less impressive is that in every survey Wave, only 46% to 58% of taxis booked for a particular time arrived on time.

Figure 24. Taxi arrival time performance - booked for a particular time, by survey Wave



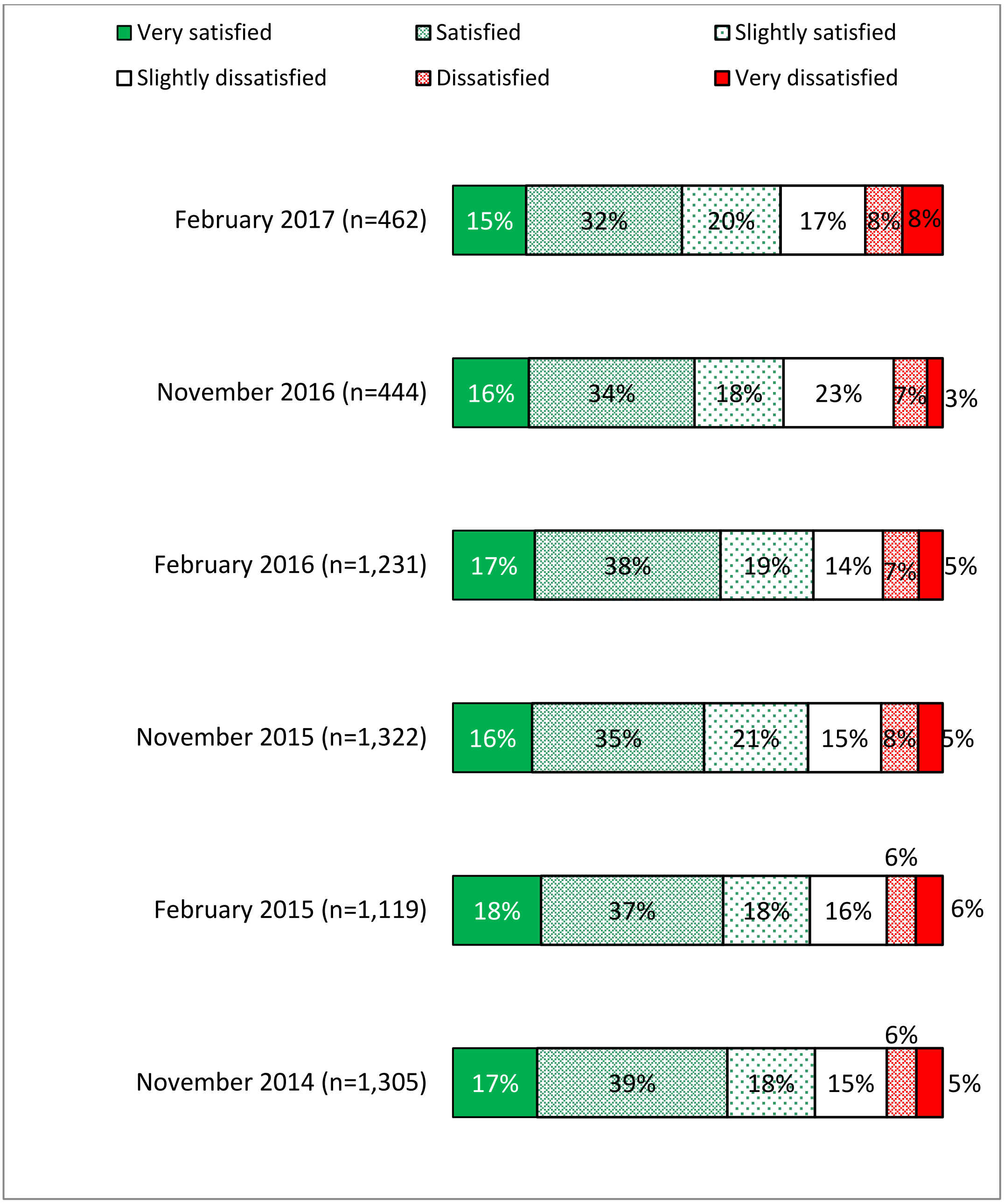
Q24b. The taxi arrived …
ASKED IF: Q24 = booked a taxi for a particular time

5.10. Satisfaction with time waiting for a taxi

In every survey Wave, over half were at least slightly satisfied with the time taken to obtain a taxi (see Figure 25).

More detailed analysis in previous reports shows that being satisfied or very satisfied with the time taken decreases sharply once the time taken exceeds ten minutes, and that being dissatisfied or very dissatisfied increases sharply once the time taken exceeds ten minutes.

Figure 25. Satisfaction with time waiting for a taxi by survey Wave



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

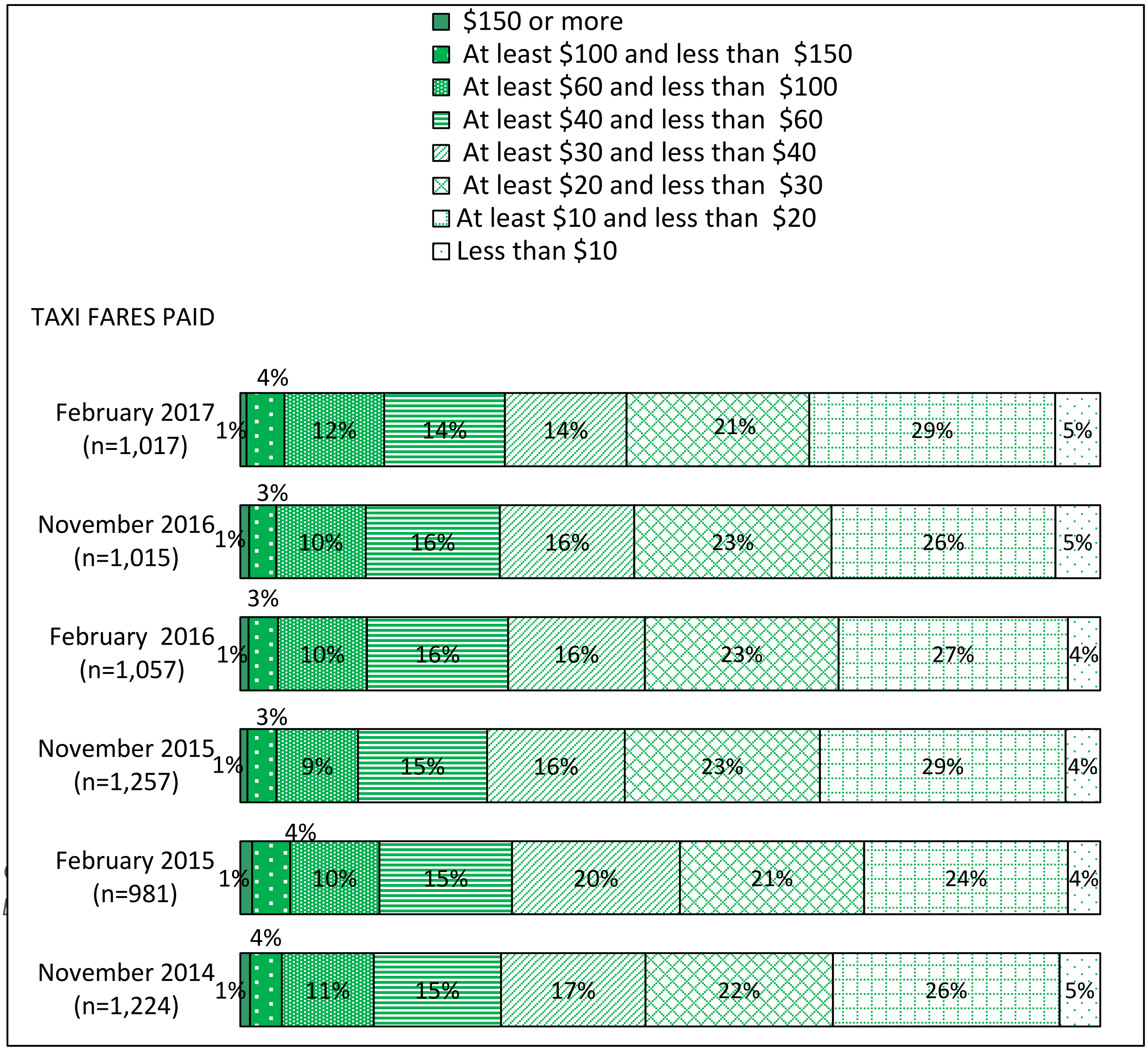
NOTE: The lower base numbers for November 2016 and February 2017 are due to selection of cases to be asked about their about last taxi trip or last ride share trip.

5.11. Amount paid for last taxi trip

As shown by Figure 26, between 49% and 55% of those taxi users who reported the fare paid had paid under $30. The percentage paying under $30 in February 2015 was slightly lower (at 49%) than in the other five Waves (all 53% to 55%), and the percentage was highest (55%) in February 2017 and November 2015. The median fare has ranged from just under $28 to just under $30.

However, these variations are no greater than can be attributed to chance. There is no clear trend for the percentage of higher fares to increase.

Figure 26. Amount paid on last taxi trip by survey Wave

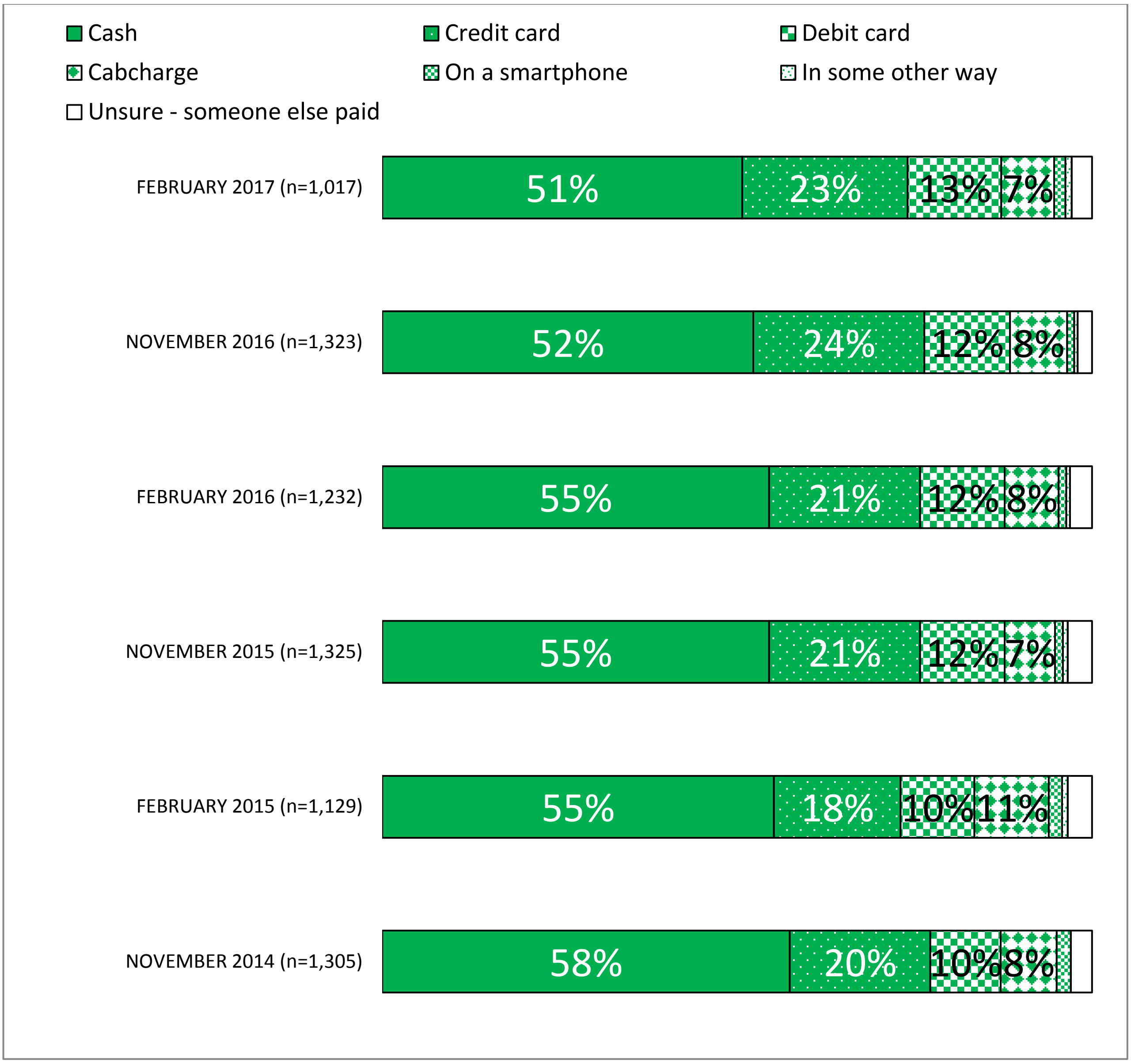


Q26. *The fare, including any service fee for electronic payment, was …*

In every survey Wave, the fare was most often paid by cash (51% to 58%), followed by credit card (18% to 24%) and debit card (10% to 13%). Cabcharge (7% to 11%) was much less often used, and other methods (including use of a smart phone) were rarely reported (3% or under).

Figure 27 shows the result by survey Wave. Variations are generally small and show no consistent pattern. Even the use of Cabcharge and of payment by smartphone show little variation over time.

Figure 27. How fare paid on last taxi trip by survey Wave



Q27 The fare was paid by ....

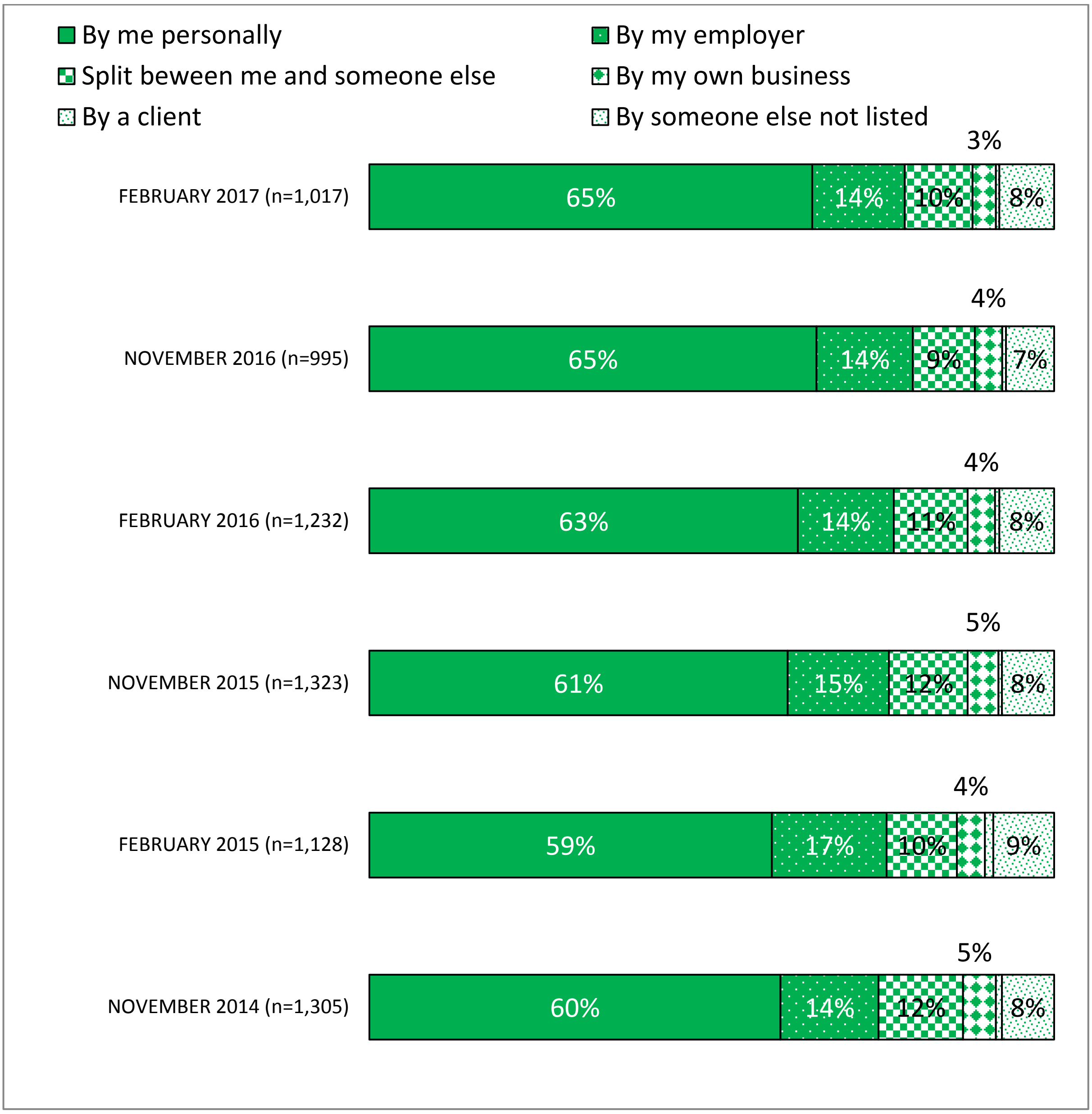
Note: Values of 3% or less are not shown

The lower base numbers for November 2016 and February 2017 are due to selection of cases to be asked about their about last taxi trip or last ride share trip.

5.13. Who paid the taxi fare

For the majority of taxi trips (59% to 65%) the fare was paid personally by the respondents (see Figure 28). Employers (14% to 17%) and splitting the fare with someone else (9% to 12%) account for most of the other cases. Payment by a client was rare (1%). There was little variation by survey Wave.

Figure 28. Who covered the fare on last taxi trip by survey Wave



Q28 The cost of the trip was covered ...

Notes: Values of 3% or less are not shown

The lower base numbers for November 2016 and February 2017 are due to selection of cases to be asked about their about last taxi trip or last ride share trip.

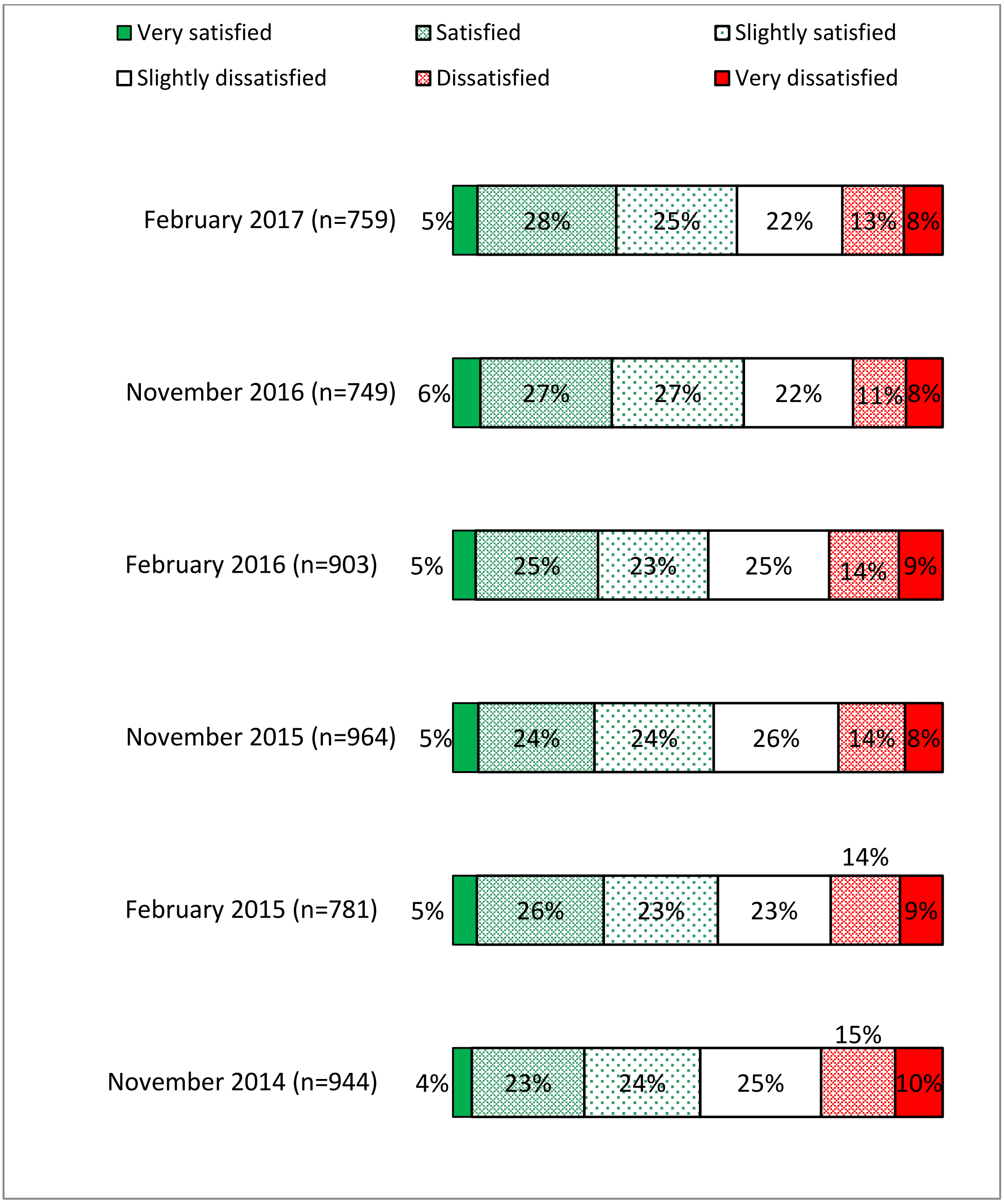
5.14. Satisfaction with the fare paid

As seen in Figure 29 around half those who recalled the fare paid were satisfied with the amount paid (from 50% in November 2014 to 59% in November 2016). The total very satisfied or satisfied ranged from 27% to 33%. Users were more likely to be very dissatisfied with the amount paid (8% to 10%) than to be very satisfied (4% to 6%).

The total percentage satisfied in November 2016 and February 2017 is significantly higher than in November 2014 This may reflect the fact that fares have not increased since 2014.

In each survey Wave, further analysis shows that satisfaction is higher where the amount paid is lower, and dissatisfaction is much higher where the amount paid is lower. Results of these analyses have been given in previous reports for the November Waves.

Figure 29. Satisfaction with taxi fare paid by survey Wave



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

NOTE: The lower base numbers for November 2016 and February 2017 are due to selection of cases to be asked about their about last taxi trip or last ride share trip.

5.15. Main purpose of last taxi trip taken

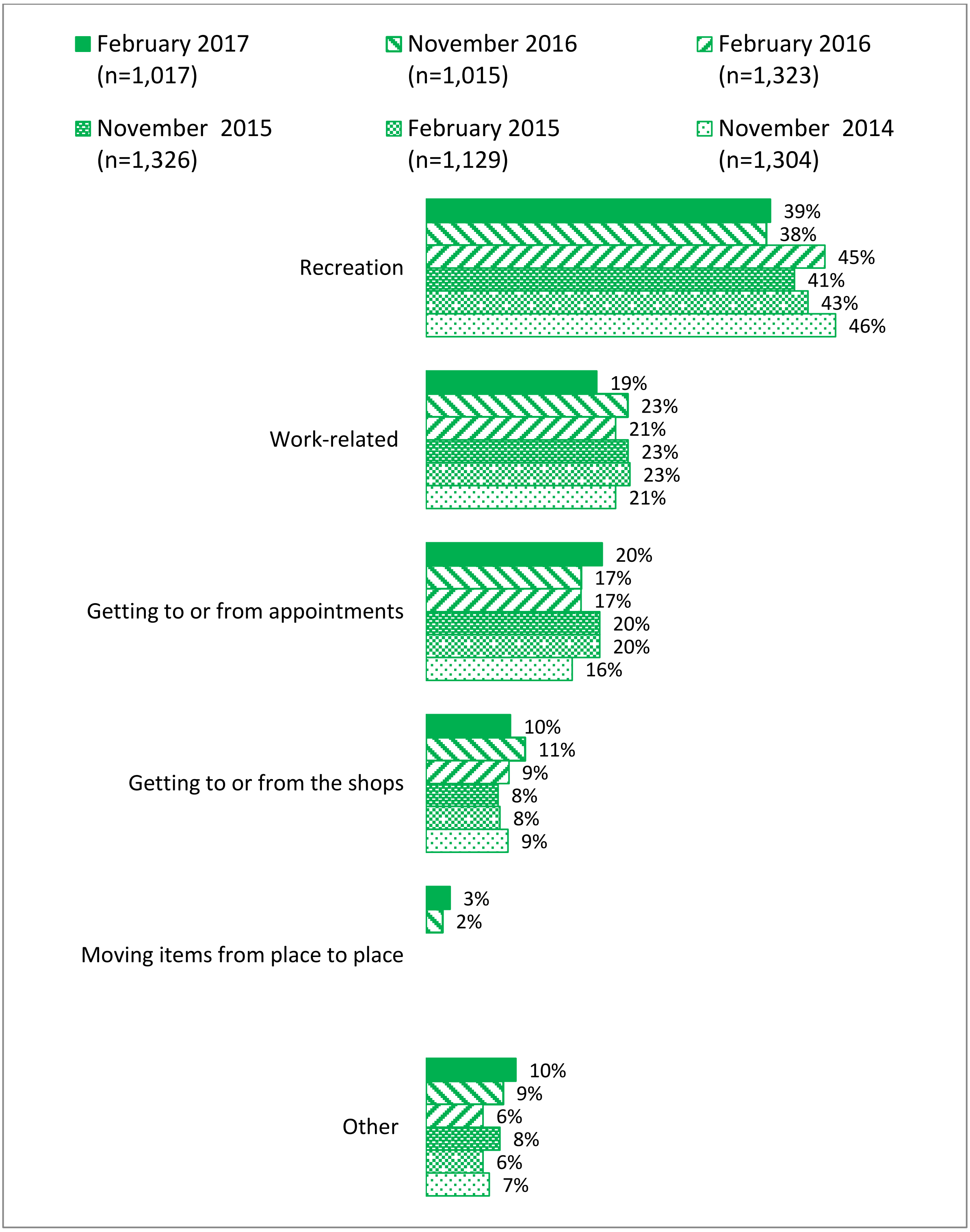
As seen in Figure 30, the most common main purpose of the last taxi trip taken was recreation (38% to 46%). This varied significantly across the six survey Waves, with the lowest levels of endorsement for this reason being in the two most recent Waves.

The other two most common purposes were for work (19% to 23%) and to get to and from appointments (16% to 20%). Variations in these two purposes are not significant.

Some taxi users reported getting to and from the shops as the main reason for the most recent taxi trip (8% to 11%). Moving items from place to place (an option added in November 2016) was rarely chosen (2% to 3%). Only 6% to 10% indicated having other main reasons not listed.

Thus despite some significant changes in the pattern of replies, the answers to this item show considerable stability.

Figure 30. Main purpose of taxi trip by survey Wave



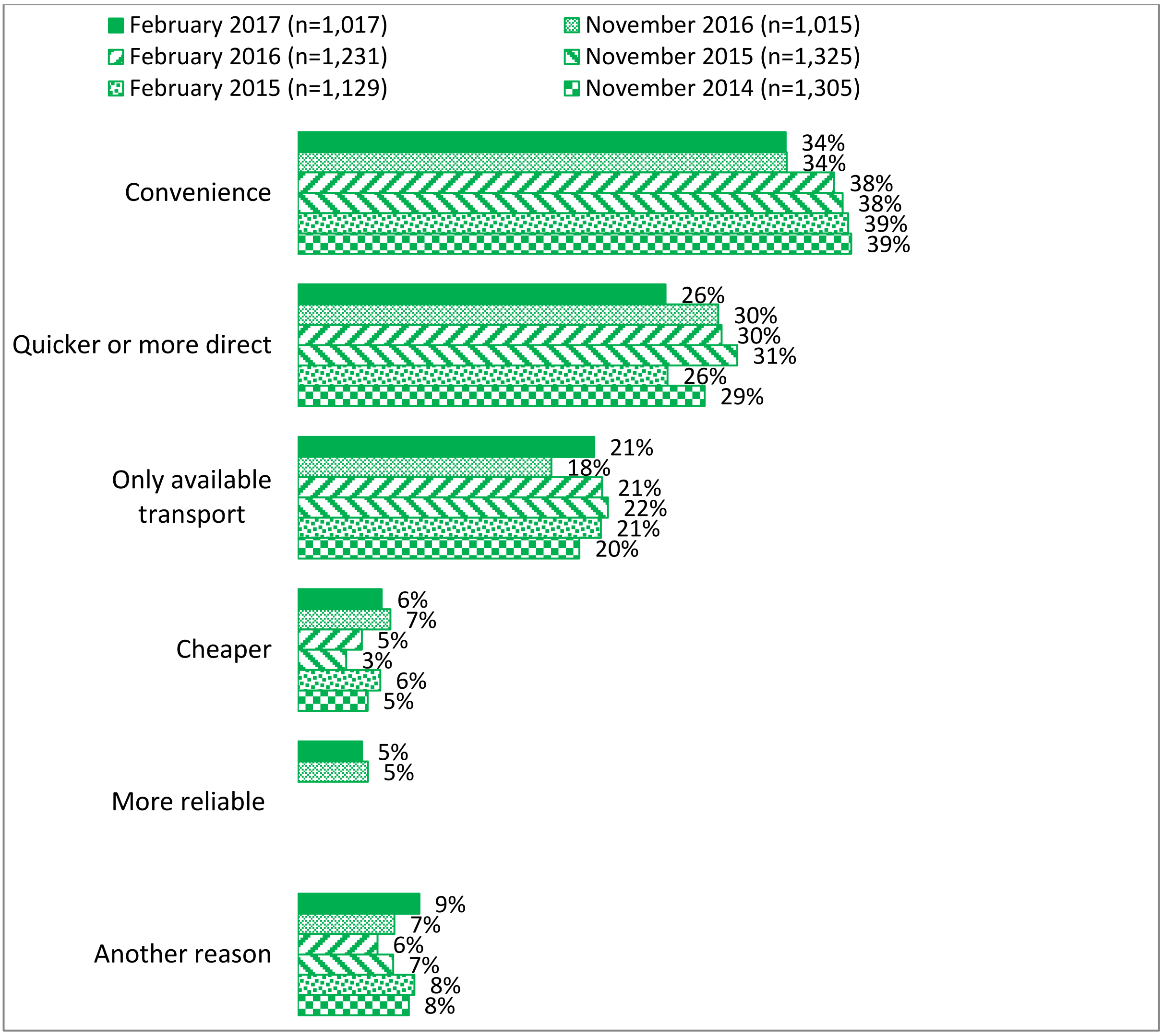
Q20 My main purpose in taking my most recent taxi trip in Sydney was …
Work-related (including getting home from work)
Getting to or from appointments / Getting to or from the shops / Recreation (such as entertainment, social visits, 'going out', including getting back home) / [2016 ONLY] Moving items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

5.16. Main reason for using a taxi

As seen in Figure 31, the three main reasons for using a taxi rather than some other mode of transport have been consistent across all six survey Waves. The most common reason has always been convenience (34% to 39%). Taxis being quicker or more direct is the second most common reason across all Waves (26% to 31%), with around one out of five (18% to 21%) in each Wave indicating it was the only available transport.

Being cheaper or more reliable have similarly low levels of endorsement in all survey Waves (3% to 7%) indicating these are not key drivers in taxi usage.

Figure 31. Main reason for taking a taxi by survey Wave



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

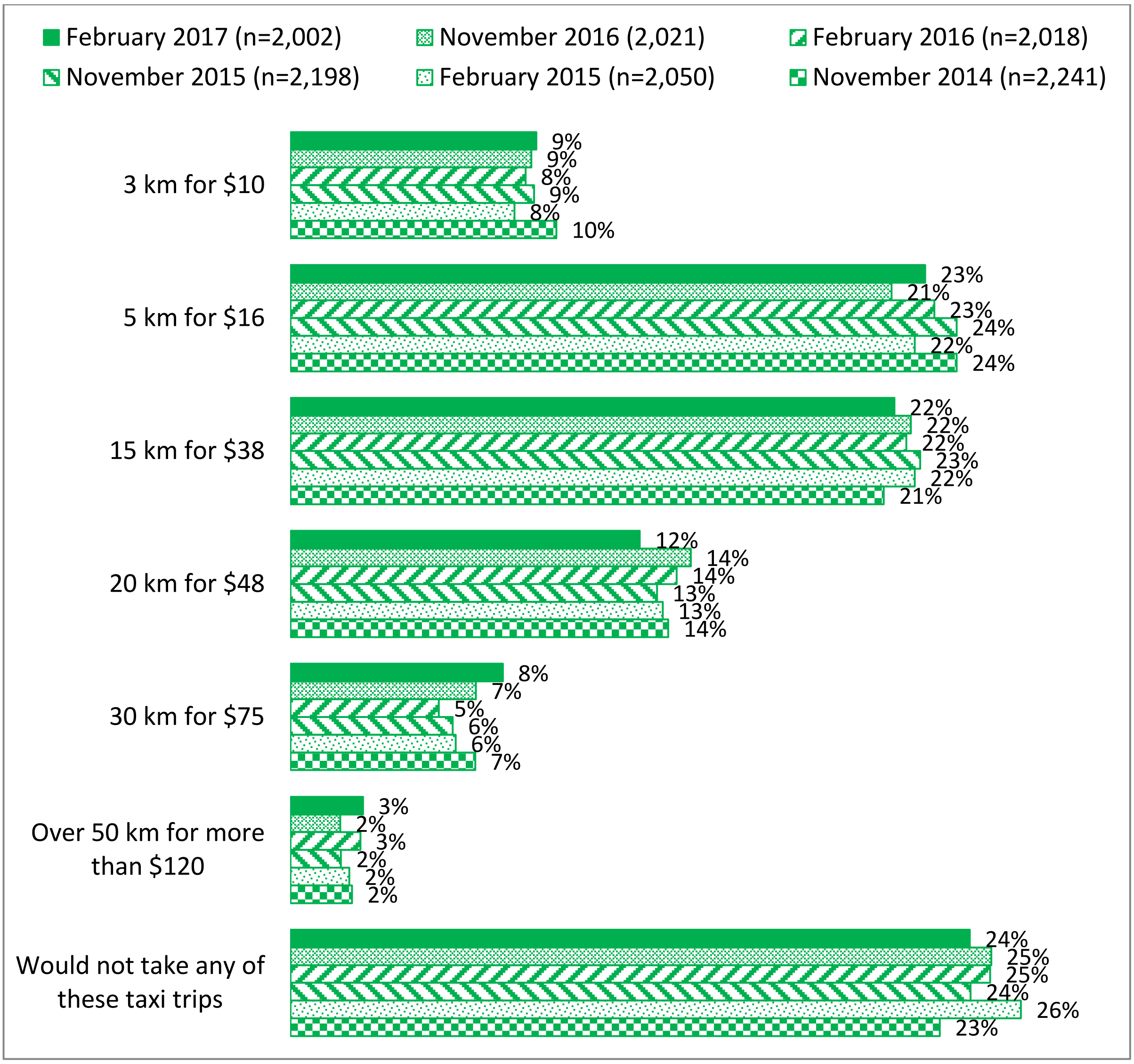
5.17. Longest taxi trip

All respondents in each survey Wave were asked what would be the longest taxi trip they would be willing to pay for (see Figure 32).

Around one quarter indicate they would not be willing to pay for any of the taxi trips listed (23% to 26%).

There was little variation between Waves indicating there is no impact based on "seasonality", and attitudes have not changed over the past three years. Over half (52% to 55%) the respondents indicated that trips of 15km for $38 or less would be the most they would be willing to pay, with the majority of these selecting 5km for $16 or 15km for $38.

Figure 32. Longest taxi trip respondent willing to pay for by survey Wave



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 ....

5.18. Value for money of taxi trips

Taxi users were asked whether taxis are good value for money or not good value overall, and then for a number of taxi use scenarios defined by combinations of time and day, and for short trips or long trips.

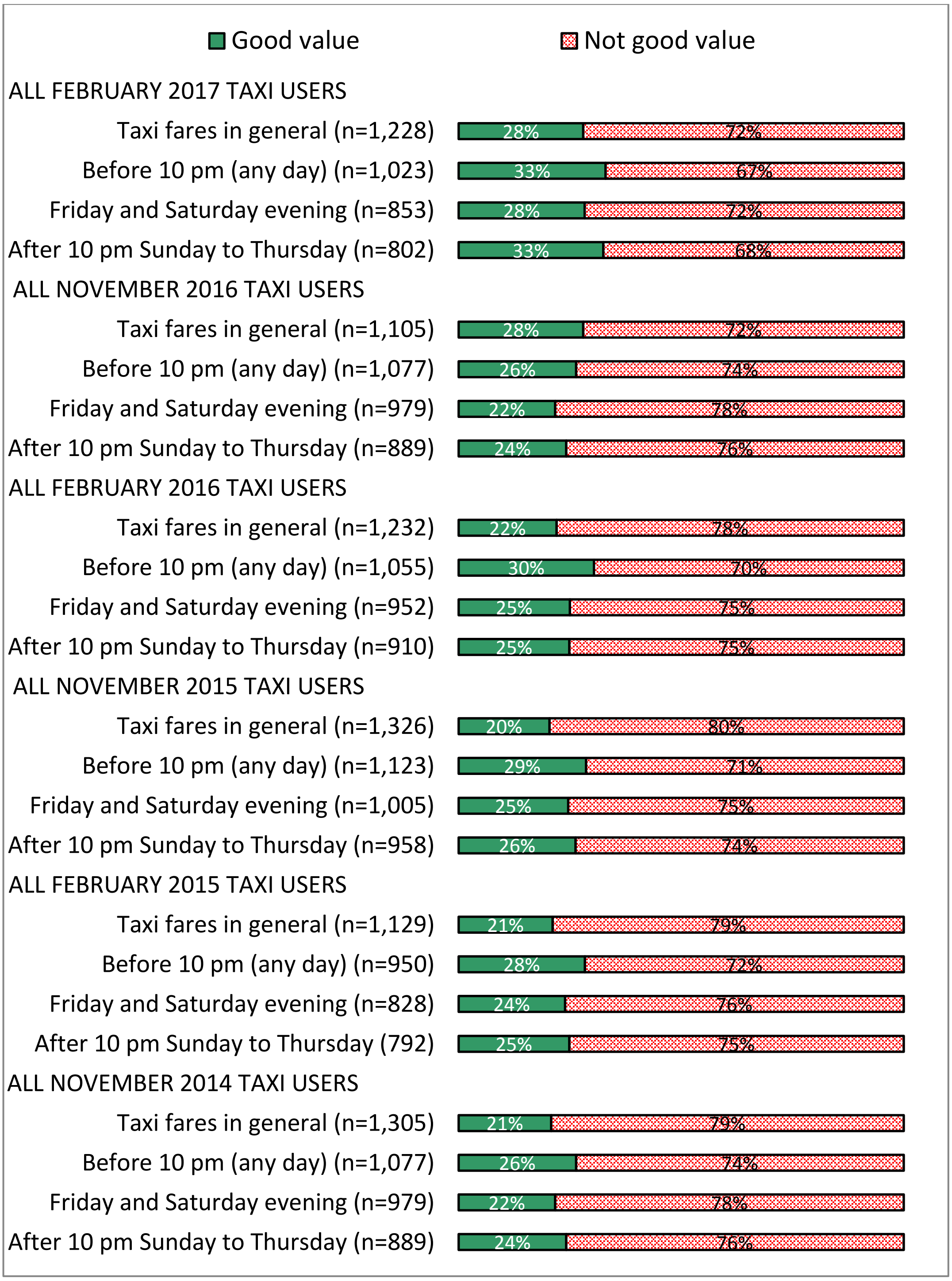
For taxi use scenarios involving scenarios, respondents could reply that they could not say because they had not used a taxi in that scenario. As this varied considerably between scenarios, to be able to compare perceived value across scenarios, those who gave this reply have been removed from the sample base, so that the answers are limited to those who considered they have relevant experience.

Figure 33 compares the results for the value of taxis overall and for the different time and day scenarios from different survey Waves.

In every wave, the percentage of taxi users considering taxi fares in general to be good value is low (20% to 28%). Although there are some differences between the scenarios by time and day that are statistically significant, there is no clear and consistent pattern in the differences. The overall differences are consistent with the variations being due to chance rather than reflecting differences in perceived value for different times and day.

The strongest finding is that in every survey wave, over 70% of those with relevant experience consider taxi fares are not good value in any scenario.

Figure 33. Trips seen as offering value for money by time and day and survey Wave



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

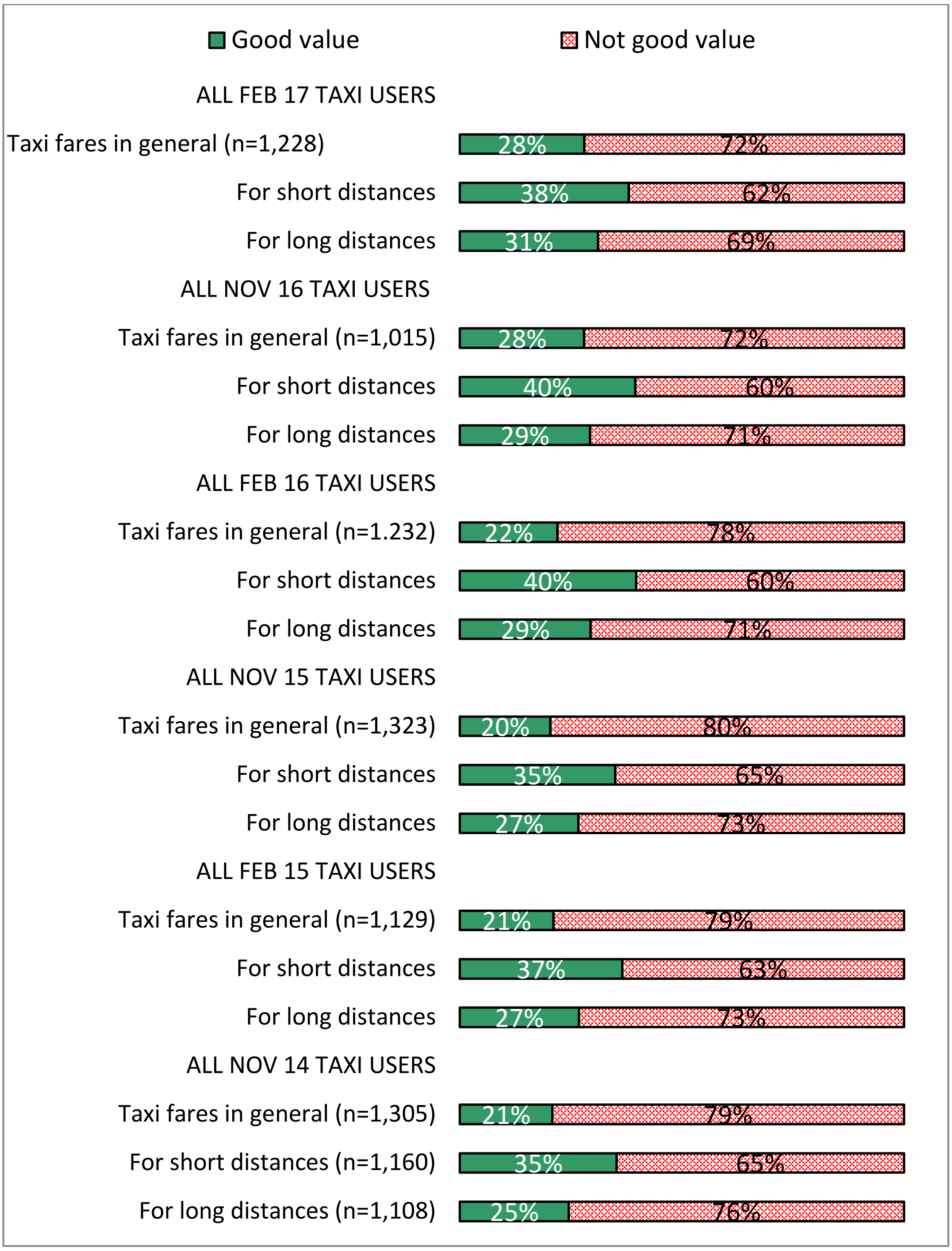
Q7 Taxi fares at night (after 10 pm) on Sunday to Thursday are …

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

BASE: Those with experience of such trips

As shown in Figure 34 taxi trips for short distances are significantly more likely to be seen as good value than long distance trips, with the ratings of 'good value' being between seven and eleven percentage points higher for short distances.

Figure 34. Trips seen as offering value for money by distance and survey Wave



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

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

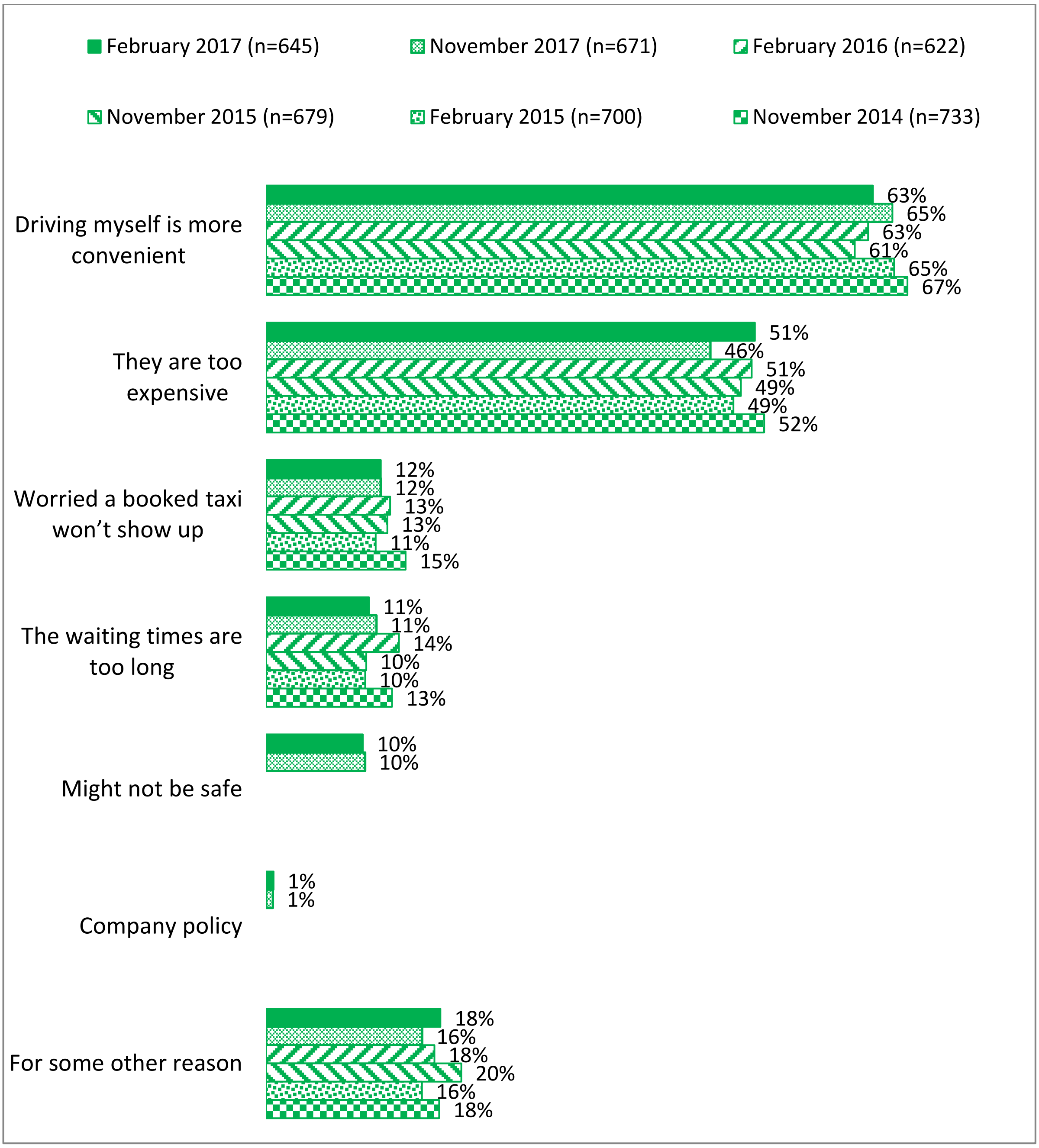
5.19. Reasons for not using a taxi

The majority of taxi non-users (not taken a taxi in the last six months) indicate that they had not taken a taxi because "driving myself is more convenient" (see Figure 35). The proportion giving this reply is relatively stable and there is no consistent trend evident over the past six Waves.

Around half of the non-users' responded that they have not used a taxi because taxis are too expensive (46% to 52%).

Each other reason listed has a stable level of endorsement across the Waves and are around one out of ten, with the exception of company policy (added to the options listed in November 2016) which is only 1% for November 2016 and February 2017.

Figure 35. Reasons for not using taxis in the past six months by survey Wave



Q41 I have not considered taking a taxi because

PROMPTED REASONS:

1. Driving myself is more convenient (2013 to 2017)

2. They are too expensive (2013 to 2017)

3. The waiting times are too long (2013 to 20176)

4. I am worried a taxi won't show up after I book one (2013 to 2017)

6. Taxi might not be safe (2016 to 2017)

7. Company policy (2016 to 2017)

5. For some other reason

5.20. Problems experienced with taxi use

The percentage of taxi users reporting having had one or more problems either during a taxi journey or when trying to catch one in the last 12 months varied between 33% and 38%, with no clear pattern over time (see Figure 36).

Figure 36. Prevalence of problems with taxi use among taxi users by survey Wave

Q40. 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

BASE: ALL TAXI USERS

Figure 37 shows the range of problems endorsed from the prompted list. Problems volunteered when a respondent who replied "something else" is asked to describe the problem were categorised and coded. Those giving a verbatim answer that fits one of the prompted problems are recoded against that problem and treated as not having another problem. Additional codes capture the remaining verbatim replies. However, none of these were given by more than 2% of respondents, and so they are not shown.

All of the additional problems are reported by no more than 2% of the taxi users who report a problem.

In each wave reported here the most common problem is being unable to get a taxi when one was needed (44% to 51%), closely followed by the driver not taking the most direct route (42% to 47%), and drivers not knowing where they were going (35% to 39% of those with a problem).

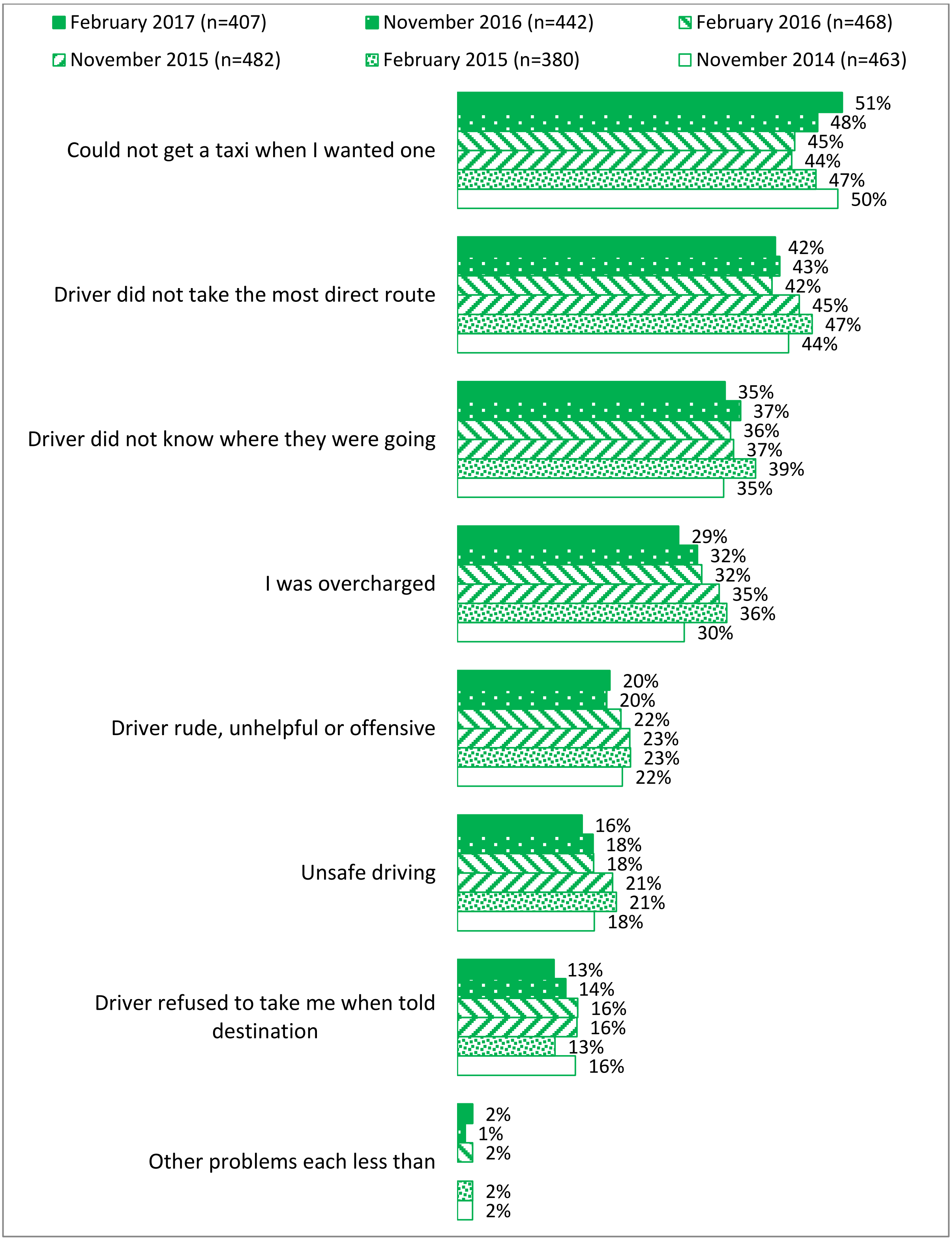
Note that the most common problem is reported by only 16% to 17% of those who have used a taxi in the past six months.

Other problems with driver behaviour or competence are endorsed by 4% to 16% of those who had taken a taxi in the past six months. Some additional problems with driver behaviour (some extremely serious) and a few with booking systems or the actual vehicle are each volunteered by under 2% or less of those with a problem and by less than half of one percent of all taxi users. Some of the volunteered replies might be endorsed by larger numbers if they had been included in the prompted list.

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

Most (80% or more) of the users with a problem are able to categorise it using the list of problems provided. Several problems were mentioned by 30% to 51% of those with a problem, including being unable to get a taxi, the driver not taking the most direct route, the driver not knowing where he was going, and being overcharged.

Figure 37. Problems experienced with taxi use by survey Wave



Q40a Problems I have experienced in the last 12 months include: (can choose more than one) with verbatim "other" replies coded
Base: Number reporting they had a problem

6. Ride share behaviour, beliefs and attitudes

In the November 2016 and February 2017 surveys, a number of additional questions were added to obtain more understanding of how ride share services are being used and of beliefs about and attitudes to ride share services.

This section of the report summarises the responses to these items, with comparisons to taxis included where this provides insight into the choice between using a taxi and using a ride share service.

As already reported, the prevalence of ride share use in the previous six months has continued to increase by around nine to ten percentage points over each twelve month period since November 2015, and the frequency of use reported by users is similar to or somewhat higher than that reported for taxis by taxi users.

6.1. Reasons for increased use of ride share services

The reasons given by ride share users for increased use of a ride share services are led by issues relating to cost (See Figure 38).

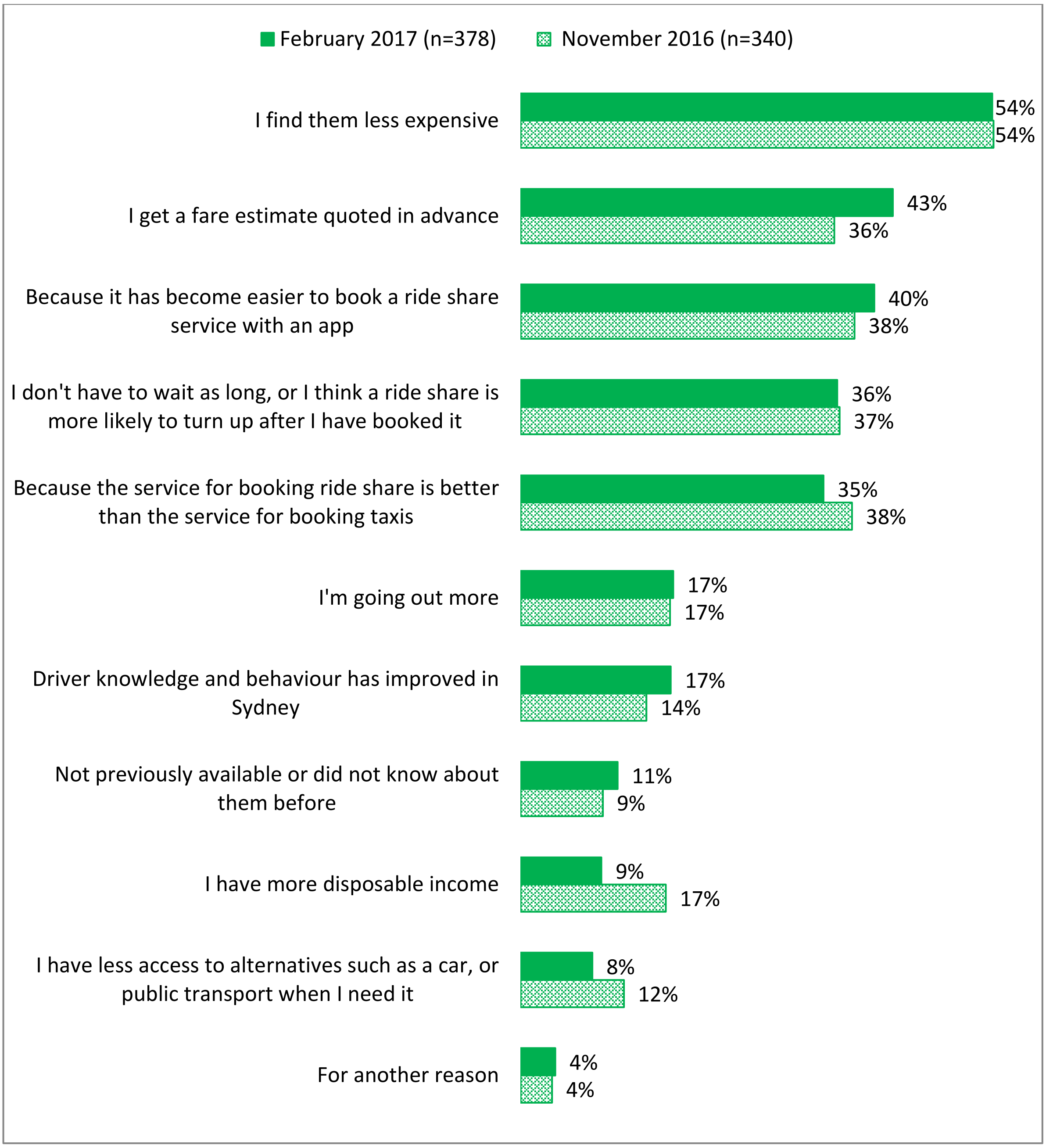
Just over half those who had reported increased use of ride share services in the previous twelve months gave being less expensive (than a taxi) as their reason for increased use (54% in both survey Waves asked this question). Being able to obtain a fare estimate in advance was also widely endorsed and was significantly higher in February 2017 (43%) than in November 2016 (36%).

Ease of booking with an app (38% to 40%), reliability (not having to wait as long or being more sure the ride share will turn up, 36% to 37%) and finding the ride share booking service better than the service for booking taxis (35% to 38%) are each widely endorsed.

Going out more is selected by 17% of those using ride share services more, suggesting that there is no seasonal difference in social activity between the November 2016 and February 2017 Waves.

Other reasons are given by under 20% of ride share users who say they have increased ride share use.

Figure 38. Reasons for increased frequency of ride share use Feb 2017 and Nov 2016



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

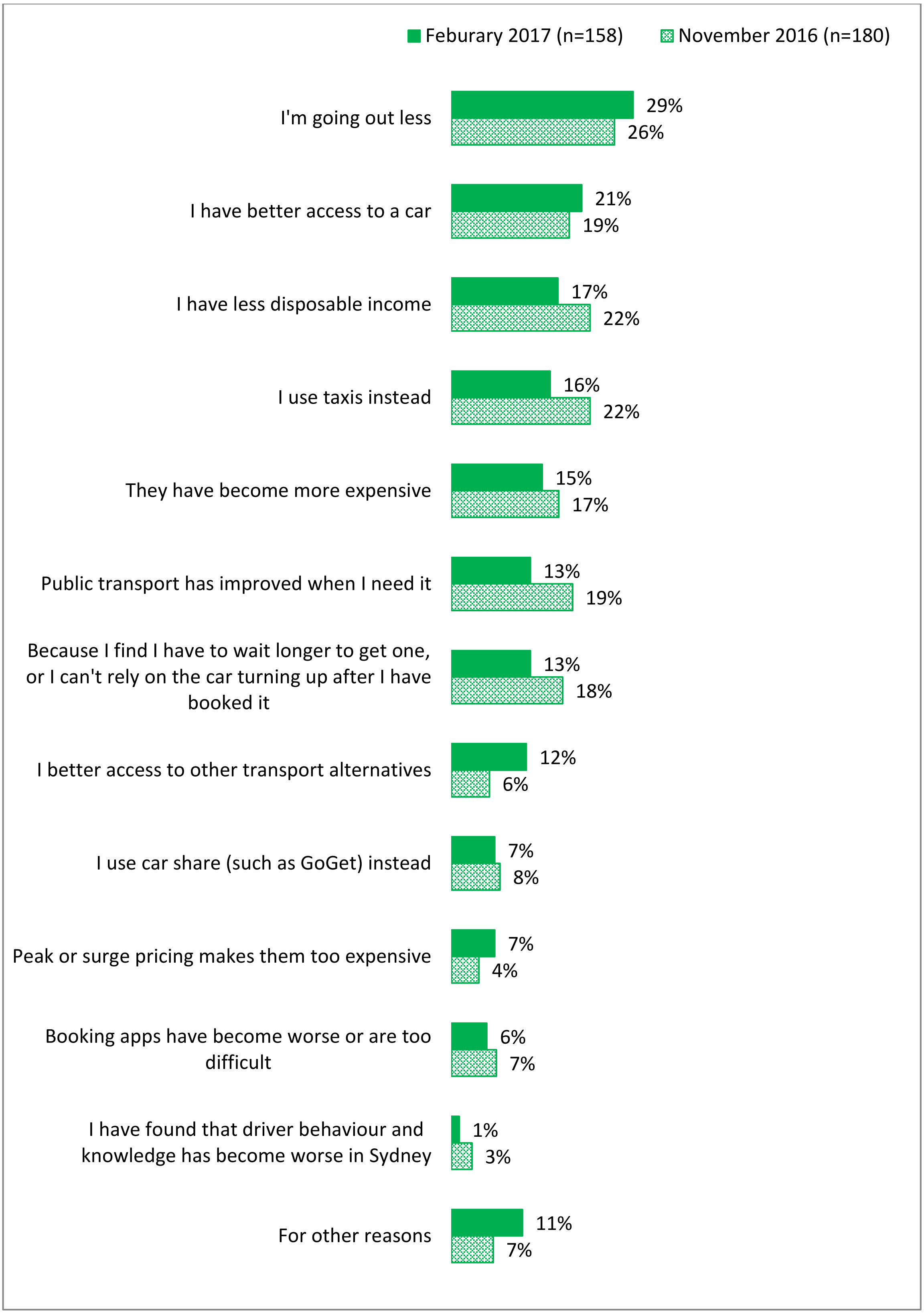
6.2. Reasons for decreased use of ride share services

The reasons given by ride share users for decreased use of a ride share services are led by issues relating to reduced need (See Figure 39). These include going out less (26% to 29%) having better access to a car (19% to 21%), switching back to taxi use (16% to 22%) and improved public transport (13% to 19%).

Reasons that involve finding ride share services less satisfactory than before are also given, including ride share services becoming more expensive (15% to 17%), increased waiting time or reliability (13% to 18%), reduced quality of the booking apps (6% to 7%), and driver knowledge or behaviour becoming worse (1% to 3%).

A few mentioned peak or surge pricing making ride share too expensive (4% to 7%).

Figure 39. Reasons for decreased frequency of ride share use Feb 2017 and Nov 2016



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

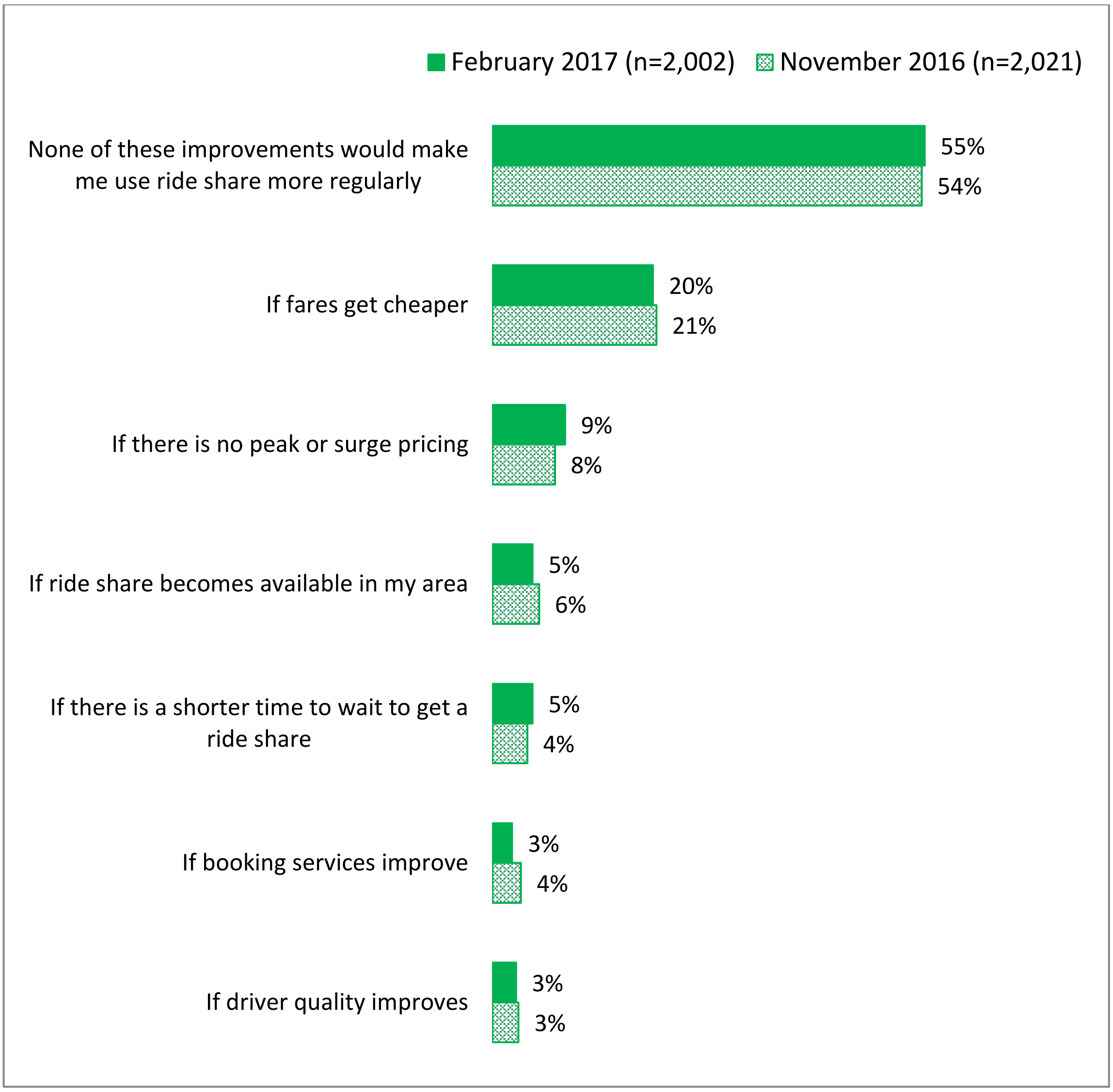
6.3. Most likely to increase ride share use

When shown a list of potential improvements in ride share services and asked which one would be most likely to get them to use ride share services more, just over half the total samples in both November 2016 and February 2017 say none of the listed improvements would get them to use ride share services more regularly.

The change most often selected as likely to achieve increased use is fares getting cheaper (20% to 21%), followed by removal of peak or surge pricing (8% to 9%), reflecting the importance of price in choosing a paid point to point transport option. The relatively low endorsement of becoming available in the respondent’s area (5% to 6%) suggests that most people in the Urban Sydney region are aware that they can access ride share services.

The other listed improvements were selected as most likely to increase ride share use by 5% or under of the total samples.

Figure 40. Most likely to increase ride share use in the next year Feb 2017 and Nov 2016



Q49E. In the next 12 months, the thing that is most likely to get me to use ride share services more regularly is: (pick only 1)

6.4. Value for money of ride share services

Some ride share services charge a premium fare in periods of peak load or when there is a surge in demand. This is called peak pricing or surge pricing.

Ride share users were asked whether ride share services offer good value for money or not overall, when peak or surge pricing is operating, and when peak or surge pricing is NOT operating.

The replies are shown in Figure 41.

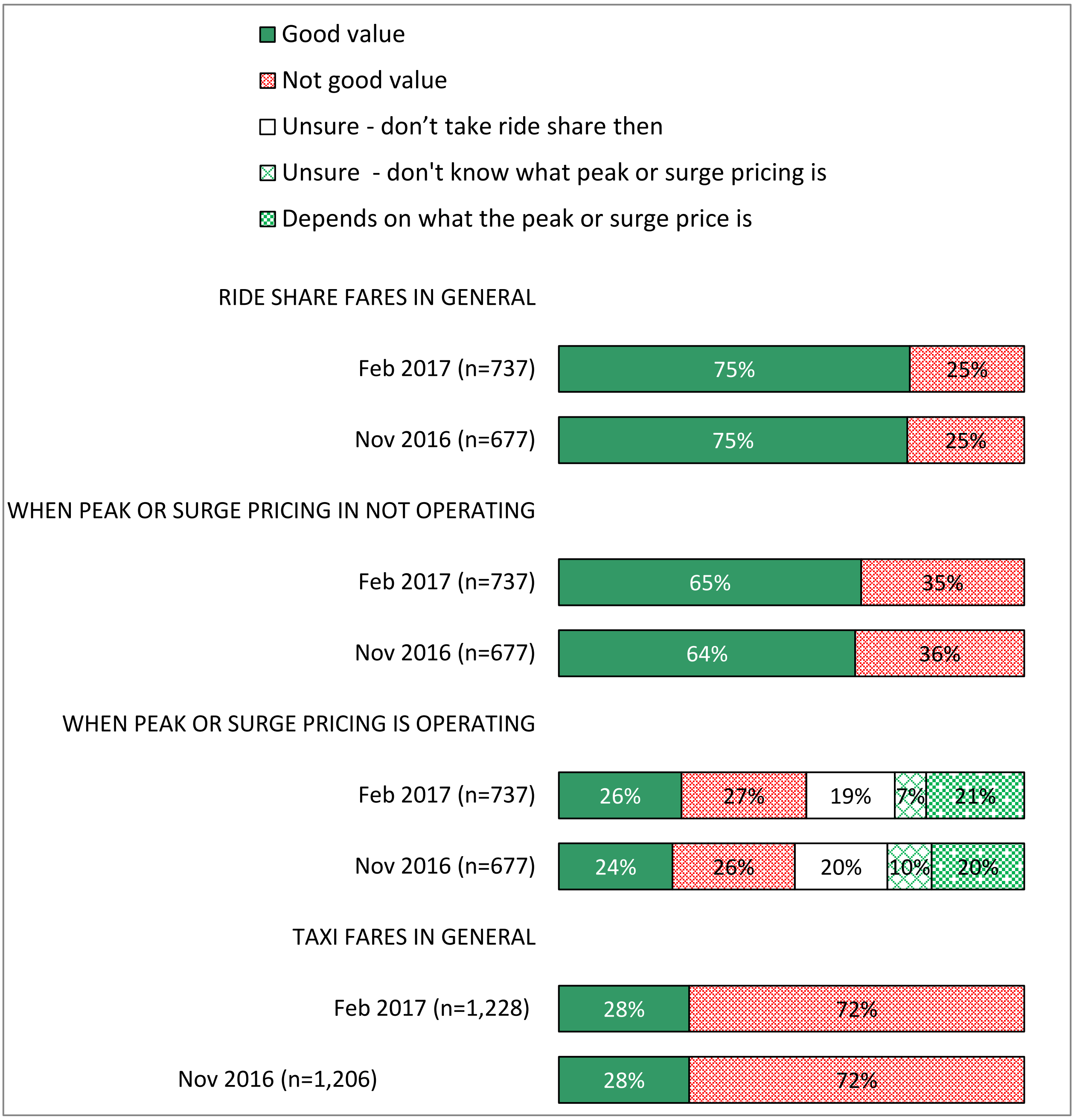
Most ride share users consider ride share service in general offer good value for money (75% in both Waves) and when peak or surge pricing is NOT operating (64% to 65%). The reduced percentage for the second item perhaps reflects a negative response on being reminded about peak or surge pricing.

These results indicate that ride share users are much more likely to consider ride share services in general or at usual rates offer good value for money than taxi users judge taxis to be (28%).

Even when peak or surge pricing is operating, ride share users who have an opinion are more likely to consider ride share services offer good value for money than are taxi users. To arrive at this conclusion, we first remove the 19% to 20% who are unsure because they have never used ride share services when peak or surge pricing is in effect, and the 7% to 10% who are unsure because they do not know what peak pricing or surge pricing is. Using this reduced base of those with an opinion, 35% consider ride share to be good value even when peak or surge pricing is operating, and 28% believe it depends on what the peak or surge price is. Only 36% to 37% outright consider ride share charges to not be good value for money when peak or surge pricing is operating.

These results strongly support the conclusion that the perceived value for money of ride share services is a major drivers for use among users, That peak or surge pricing can reduce the perceived value for money of ride share services (although the effect depends on what the increased prices actually are) is completely consistent with the over-riding importance of price for those choosing to use ride share services rather than taking a taxi.

Figure 41. Value for money of ride share trips in general and when peak or surge pricing operating or not operating Feb 2017 and Nov 2016

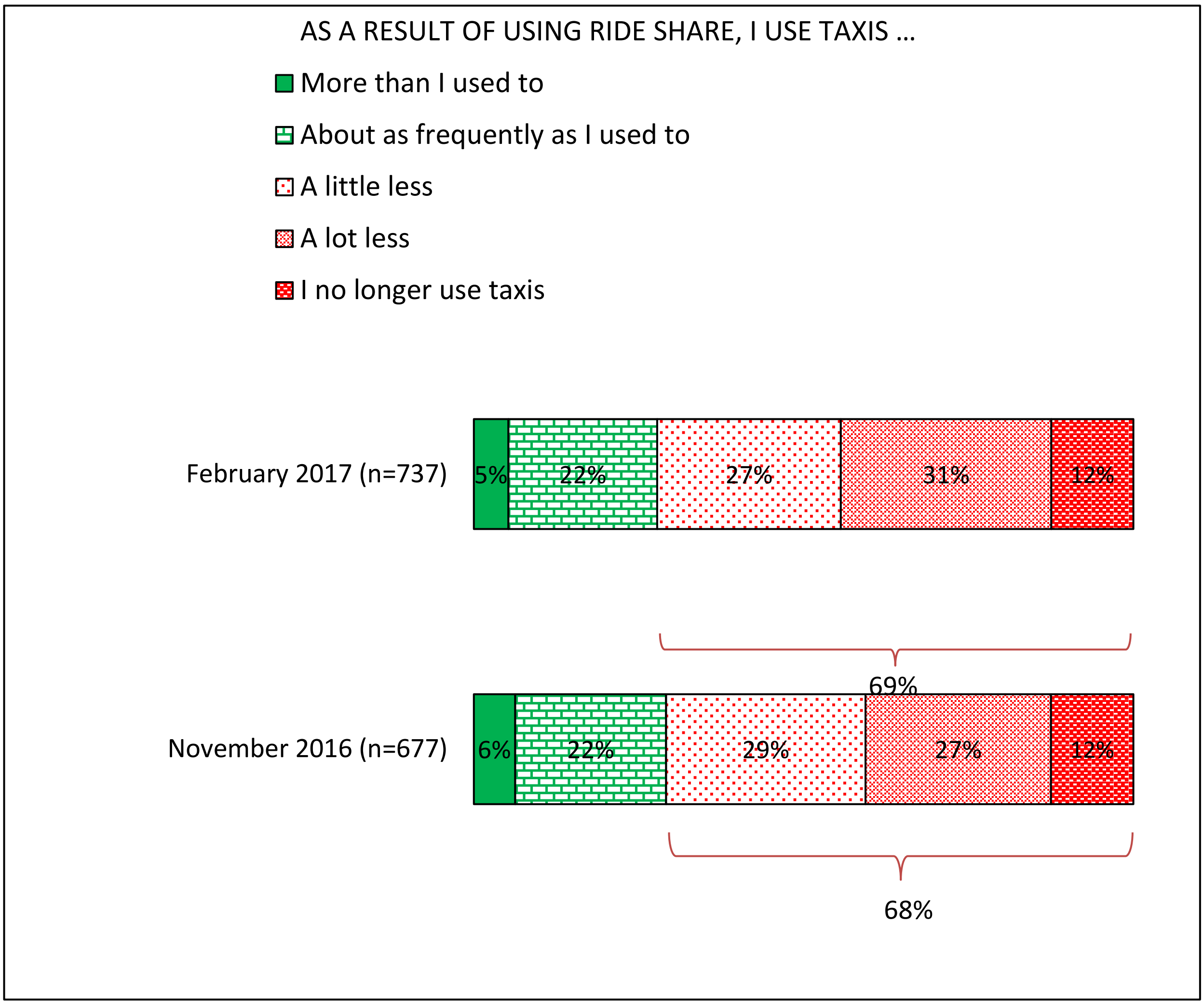


Q49F. Overall I think …
Q49G Ride share fares when peak or surge pricing is NOT operating …
Q49H Ride share fares when peak or surge pricing IS operating…
1. Ride share fares are good value for money /
2. Ride share fares are not good value for money

6.5. Effect of ride share use on taxi use

Ride share users were also asked about the effect of their use of ride share services on their use of taxis. As Figure 42 shows, over two in three ride share users believe it has reduced or stopped their use of taxis (68% to 69%). Just over one in five (22% in both Waves) consider it has not changed their use of taxis, and a few (5% to 6%) that they have increased their use of taxis. Some ride share users (4% to 5%) report they have never used taxis – suggesting that the availability of ride share services has expanded the total market for paid point to point transport.

Figure 42. Effect of ride share use on taxi use Feb 2017 and Nov 2016



Q49i. As a result of using ride share, I use taxis ...
Item introduced November 2016

6.6. Waiting times for ride share services

Ride share users were asked whether they believed that the time taken to obtain a ride share service was reasonable or too long in the daytime, on Friday or Saturday nights, and on other week nights. Similar questions were asked about the wait required to obtain a taxi.

Figure 43 shows the distribution of replies for ride share services and compares this to replies for taxi services for the November 2016 and February 2017 survey Waves. For both ride share and taxis, those who indicated they had no opinion because they have not used the service at the specified time have been removed from the sample bases.

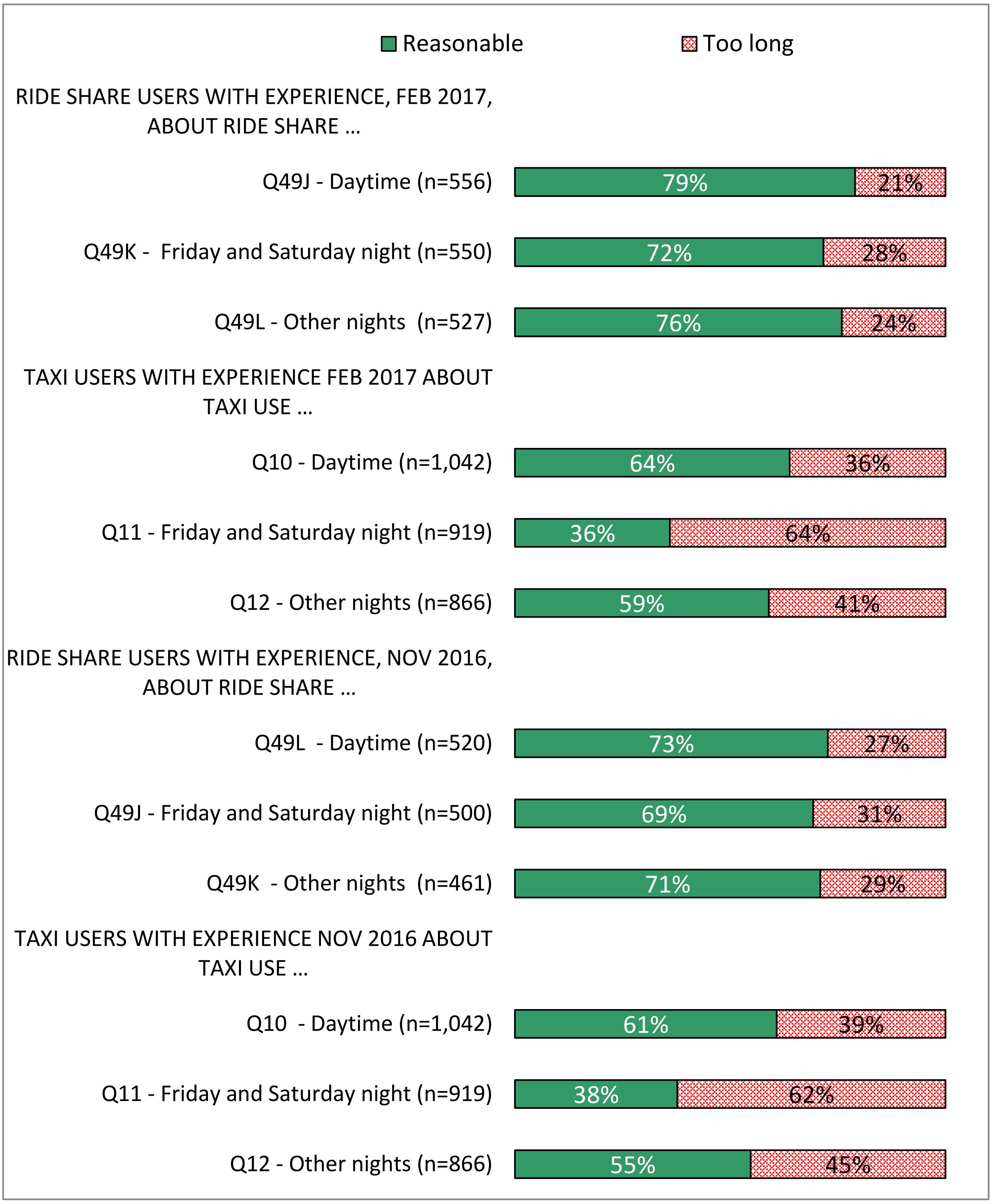
In both survey Waves, ride share users with relevant experience are significantly and substantially more likely to consider waiting times for a ride share to be reasonable on a Friday or Saturday night (69% to 72%) than taxi users with relevant experience asked about waiting times to obtain a taxi on a Friday or Saturday night (36% to 38%).

While the differences are smaller for other nights (71% to 76% for ride share and 55% to 59% for taxis), waiting times for a ride share are significantly more likely to be considered reasonable on other nights than waiting times for a taxi.

The differences for daytime trips are somewhat smaller (73% to 79% for ride share compared to 61% to 64% for taxis) but are again statistically significant.

All results for ride share for February 2017 were higher than for ride share for November 2016 although the differences (three to six percentage points) are at most marginally significant. Given these questions about perceptions of ride share have only been asked in two survey Waves no confident conclusion can be drawn about a trend, but there is no sign that the belief that waiting times are reasonable is declining as the prevalence of ride share use increases.

Figure 43. Whether waiting times considered reasonable Feb 2017 and Nov 2016



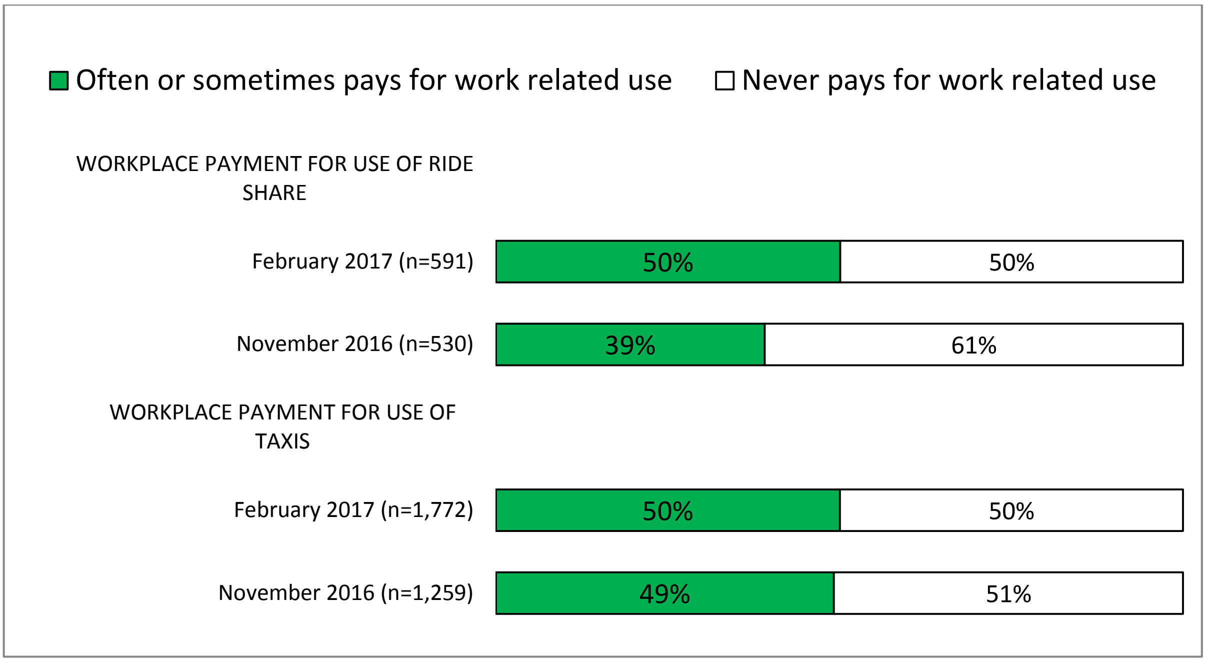
Q. During the day, I think that the time taken to get .[Q10 a taxi] / [Q49L a ride share]
Q. On Friday and Saturday nights, I think that the time taken to get [Q11 a taxi] /[Q49J a ride share]
Q On Sunday to Thursday nights, I think that the time taken to get .[Q12 a taxi] / [Q49K a ride share] is …
Bases exclude those who replied "Don't know – have not used a ride share/taxi at that time"

6.7. Use of ride share services in workplaces

The November 2016 and February 2017 survey Waves asked a series of questions about the willingness of respondent's workplaces to pay for use of ride share services. These parallel the items asked about taxi use.

Figure 44 shows that the willingness of workplaces to pay for ride share trips taken for work related use has reached the same prevalence in February 2017 (50%) as taxis in November 2016 (49%) and February 2017 (50%), significantly higher than in November 2016 (39%).

Figure 44. Workplace ride share and taxi use policies, Feb 2017 and Nov 2016



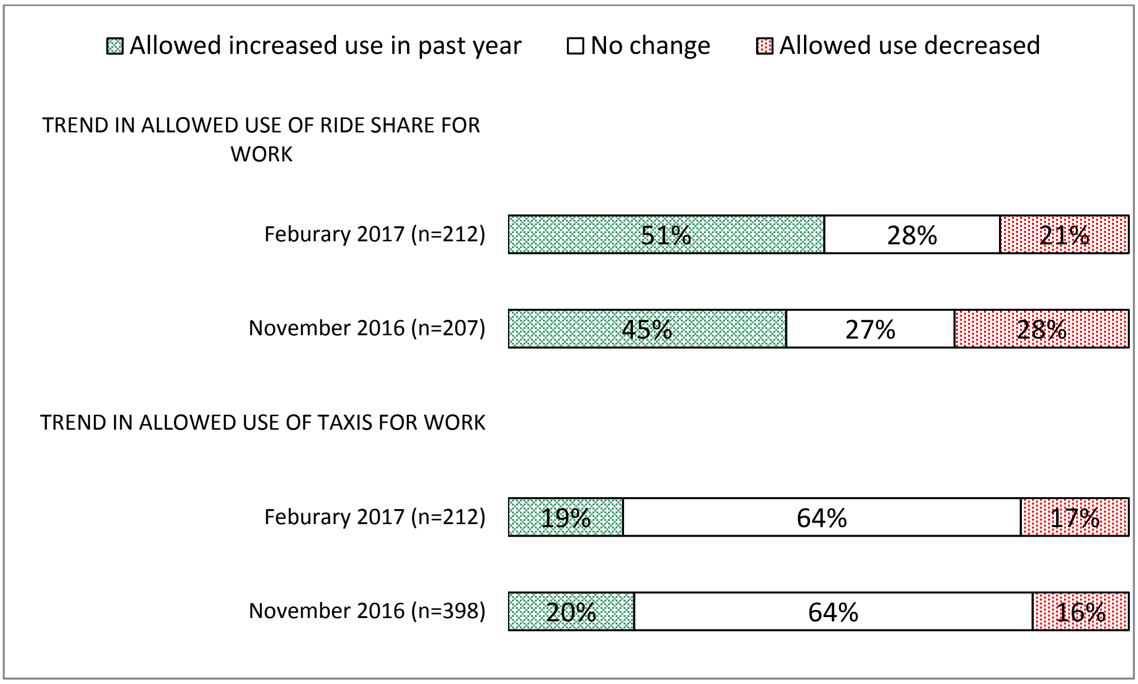
Q. My workplace .... Often or sometimes pays for staff to travel by [Q49m ride share/ Q2c taxi] for work related purposes / Never pays for staff to travel by [Q49m ride share/ Q2c taxi] for work related purposes
Base: Those in paid work using each service mode

Ride share users who are working were also asked whether their workplace had increased, not changed or decreased use of ride share services for work purposes. Figure 45 shows that in both November 2016 and February 2017, significantly more ride share users reported that their workplace had increased allowing use of ride share services (45% and 51%) than reported their workplace had decreased use (28% and 21%), with the gap increasing from 17 percentage points to 30 percentage points.

This contrasts strongly with the limited percentage indicating policy about taxi use had changed, with those reported increased use (19% to 20%) being only slightly more than those reporting decreased use (16% to 17%), differences of between two and four percentage points.

These results suggest that workplace use of ride share services is increasing, and perhaps doing so at an increasing rate, while workplace use of taxis is on balance not changing. This is consistent with the overall increase in prevalence of ride share use while prevalence of taxi use remains unchanged.

Figure 45. Trend in workplace ride share use and taxi use policies Feb 2017 and Nov 2016



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

6.8. Not using a ride share service

In the two most recent survey Waves, a sample of ride share users were asked if they had ever tried to use a ride share service and been unable to do so.

Based on those who had either used a ride share service or tried to do so but been unable to obtain a ride, 21% (November 2016) and 16% (February 2017) of all actual and potential ride share users said they were unable to get a ride share when they wanted one. These percentages might slightly overstate the rate of not being able to get a ride share, as some of those who said they could not get one said they decided to not go ahead because of the cost under peak or surge pricing. Allowing for this reduces the rate of not being able to obtain a ride share when one was wanted to 15% for February 2017 and does not change the percentage unable to get a ride share in November 2016.

Those who said this had happened to them were then asked to select one reply from a list of possible reasons for not taking the ride share service the last time this happened.

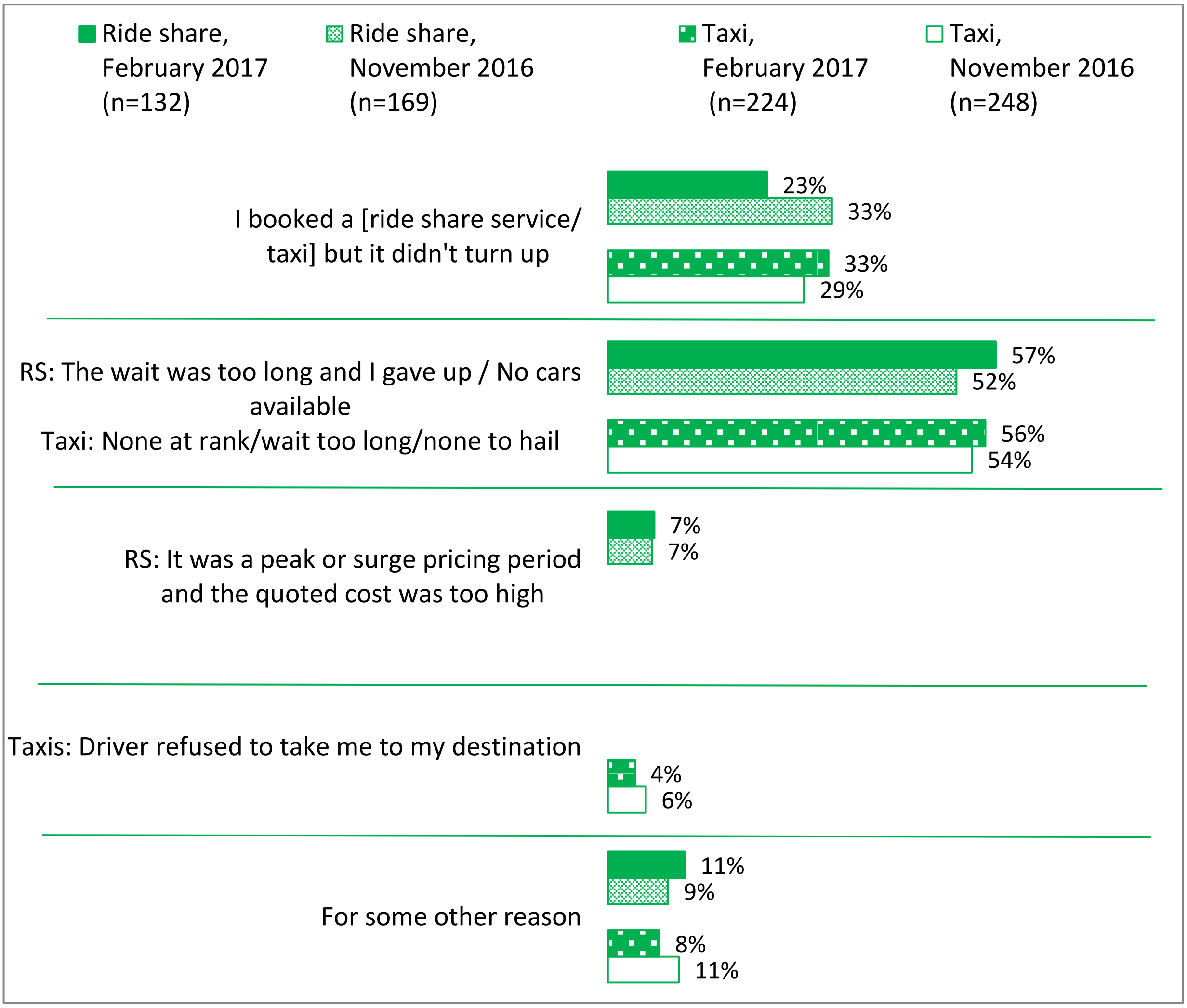
Results for this question are compared to the results for a similar question asked those seeking to use a taxi and shown in Figure 46.

Three reasons for not taking a ride share when trying to do so dominated (see Figure 46): giving up after finding the wait was too long (27% in both Waves), finding there were no cars available in the respondent’s area (25% in November 2016, 31% in February 2017) and booking a ride share service that did not turn up (33% in November 2016, 23% in February 2017). The second and third reasons listed are combined in Figure 46 to facilitate comparison with the replies to the similar question asked about taxi use. The two combined reasons are compared to the combination of three mutually exclusive replies offered for taxis – no taxi at a rank or having to wait too long at a rank or being unable to hail a passing taxi.

None of the differences between Waves are statistically significant, perhaps due to the relatively small sample sizes (132 and 169). The percentage saying that the ride share car they had booked did not turn up appears lower in February 2017 than in November 2016, and lower than the equivalent reason for not taking a taxi but the difference is not large enough to be statistically significant given these sample sizes.

Finding the cost too high due to peak or surge pricing (7% in both Waves) and other reasons that were not stated (9% and 11%) were much less commonly selected by those seeking to use a ride share service. Those seeking to use a taxi were much less likely to say the driver refused once told their destination (4% to 6%) or gave some other reason not listed (8% to 11%).

Figure 46. Reasons did not use a ride share or did not use a taxi when tried to do so Feb 2017 and Nov 2016



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

To round out the picture, those who had used a ride share service in the past six months were asked if they had ever considered doing so and decided not to, and then asked their reason for not going ahead.

Concern about the cost (35% to 37%) and that the vehicle might not turn up (25% to 29%) dominated the replies (see Figure 47). A few (10% to 11%) reported that a bus arrived while they were waiting and they took the bus, and others that a taxi came before the ride share and they decided to take the taxi (10% to 12%). However over one in three (31% to 35%) had some other reason not listed, and no follow-up question was asked to establish the reason for these respondents.

Comparison with the replies given to the similar list of reasons given in the parallel question about reasons for deciding to not take a taxi, (see Figure 20) shows a quite different picture.

Using only the results for taxis in the last two survey Waves, 68% to 69% of those who had decided to after all not take a taxi gave concern that is would be too expensive as their reason effectively twice as many as for ride share.

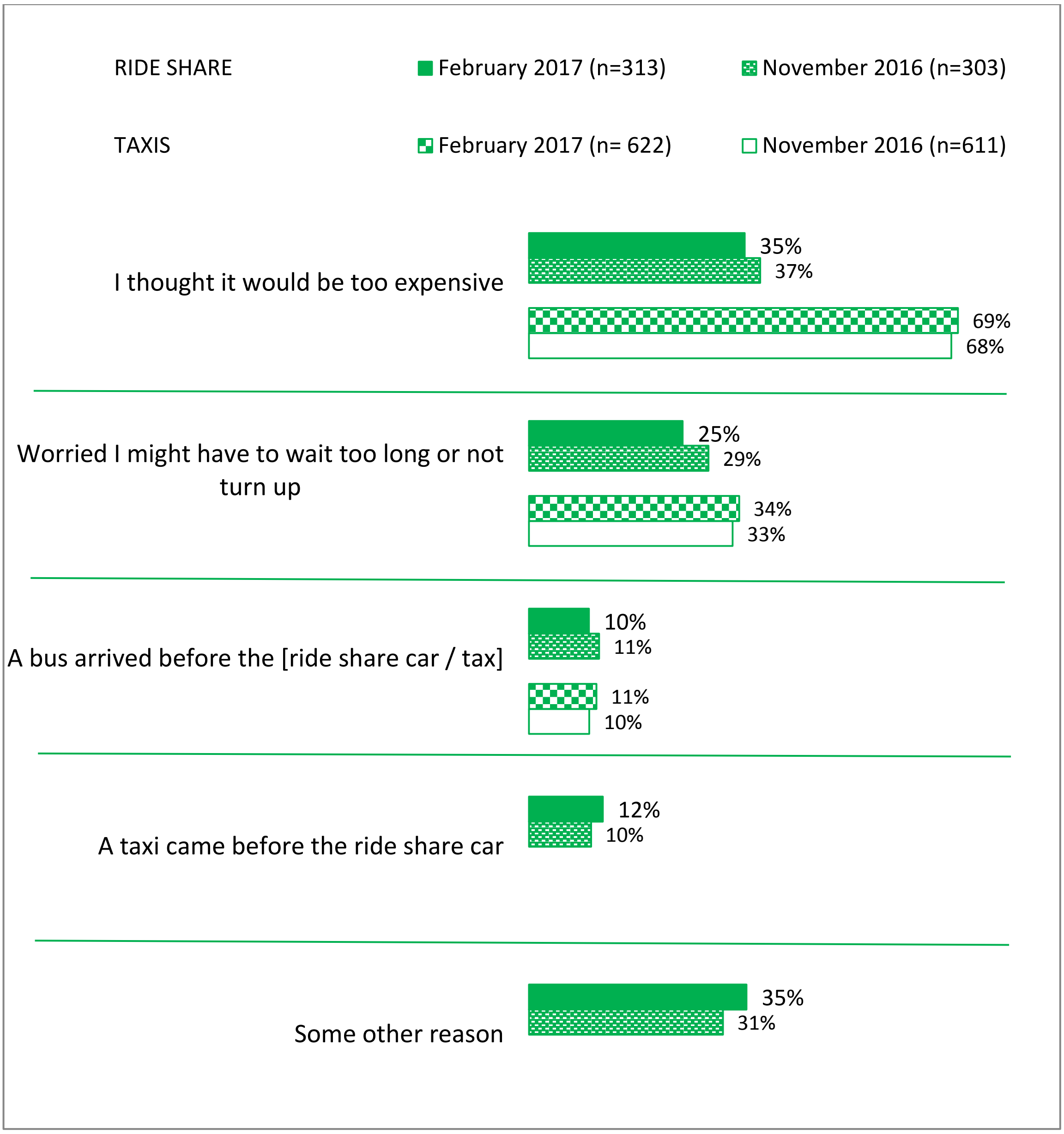
Even if those who replied “Some other reason” are excluded from the results for ride share (as this option was not offered in the similar item about taxi use) the 53% to 54% who replied “It would be too expensive” for ride share is well below the 68% to 69% giving this reason for not taking a taxi.

While 25% and 29% of those who considered taking a ride share and then decided not to are concerned that the ride share might take too long or not turn up, 33% to 34% of taxi users who considered taking a taxi and then did not were concerned that it might take too long to get a taxi or that a booked taxi might not turn up. This difference might in part be due to the fact that all ride share services require booking either the next available car or asking for a car in a specific time slot, while only some taxis are booked.

For both ride share and taxis, 10% to 11% took a bus that came along before the ride share car or before they could get a taxi.

The major difference between taxis and ride share is concern about it being too expensive, being a much more common issue for taxis than for ride share. Concern about not being able to get a ride or that the wait might be too long also appeared more prevalent for taxis than for ride share. However, we do not know what the other reasons not listed for not going ahead and using a ride share service might be.

Figure 47. Reasons decided to not use a ride share service Feb 2017 and Nov 2016



Q33b/Q33RSb The last time I did not use a [taxi / ride share service] although I thought about it, I decided not to because ...

Base: Thought about using a [taxi / ride share service] but then decided to do something different at Q31/Q31RS

Note: For taxis, the code "Worried I might have to wait too long or that the taxi might not turn up" nets together all those who gave any of the replies "Worried a booked taxi might be late or not turn up", "Considered hailing but decided wait would be too long" or "Thought the wait at a taxi rank would be too long"

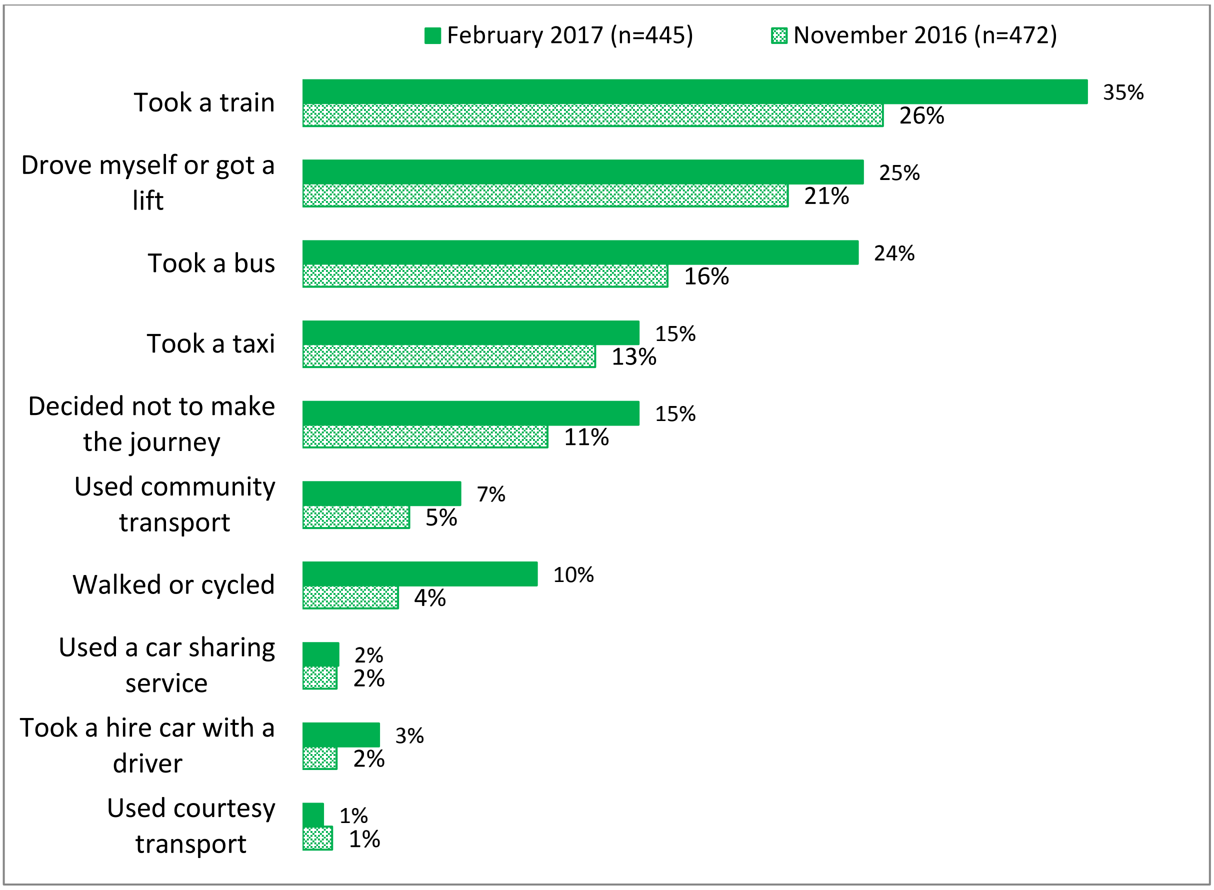
Those asked about taxis were not given the option of choosing "Some other reason". If those replying "Some other reason" when asked about ride share are excluded, in both survey Waves, 54% replies "I thought it would be too expensive"

6.9. Action taken instead of taking a ride share service

In both survey Waves (see Figure 48) those asked what they did instead of taking a ride share service when they had thought about taking one and then did not were most likely to take a train (26% in November 2016 and 35% in February 2017), drive themselves or get a lift (21% and 25%), or take a bus (16% in November 2016, 24% in February 2017). Some decided to not take the journey (11% and 15%), took a taxi (11% and 15%), or walked or cycled (4% and 10%). A few used community transport (5% and 7%) while under 5% did any of taking a hire car with a driver, using a car sharing service, or using courtesy transport.

These results are quite similar to those for what was done instead of taking a taxi (see Figure 21). The percentage who reported using a ride share service instead of taking a taxi (11% and 17%) reached a similar level to taking a taxi instead of using a ride share service(13% and 15%).

Figure 48. Action taken instead of using a ride share service Feb 2017 and Nov 2016



Q32RS The last time I tried to use a ride share service or thought about using one and in the end did not, I ...
Base: Those who said "I thought about using a ride share service but then decided to do something different" PLUS those who had been "unable to get one" in Q31RS - total n=472 in November 2016, 445 in February 2017. Note item was single reply only in November 2016, and allowed multiple replies in February 2017, which explains the overall increase in the percentage giving most replies.

6.10. Problems experienced with ride share services

A sample of those who had used ride share services were asked if they had experienced any problems and (if they had) asked to select all those problems they had experienced from a list. This item closely paralleled the similar question asked about problems with taxi use.

In the past two survey Waves, 27% and 24% of the ride share users asked report they have had one or more problems with ride share services. This is somewhat less than the prevalence of having a problem reported by taxi users (33% and 37% - see Figure 37). The differences in both Waves are statistically significant: taxi users are more likely to report having had a problem than ride share users.

Figure 49 shows the percentages of those reporting they had a problem who selected each of the listed problem descriptions. Note that anyone who indicated they had another problem not listed was asked to describe that problem and where possible this was coded back into the listed options. Additional categories identified from the verbatim replies did not account for more than a couple of percent of respondents.

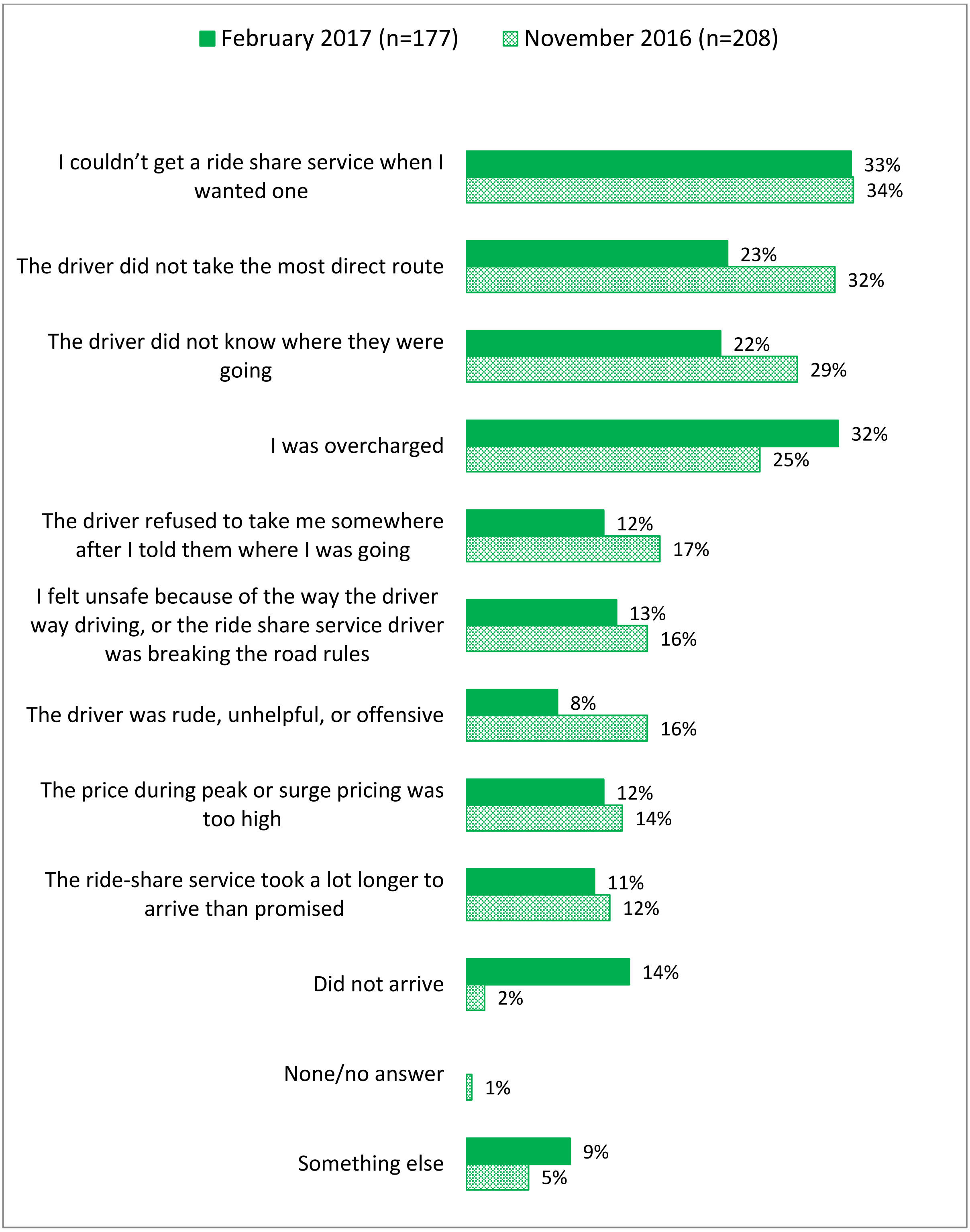
Four problems stand out in the last two surveys as the most likely to be reported: not being able to get a ride whare when one was wanted (33% to 34%), the driver not taking the most direct route (32% and 23%), being overcharged (25% and 32%) and the driver not knowing where they were going (29% and 22%). Each of these problems was reported by between 5% and 9% of the ride share users asked.

A range of even less common problems reported are shown in Figure 49. Each of these were reported by less than 5% of ride share users.

Several of the problems listed were more often reported by those taxi users who had a problem, than by ride share users with a problem, as comparison with Figure 37 shows.

Given these results, although the initial motive for trying ride share services might be the lower cost, it seems likely that given the lower prevalence of problems experienced with ride share services, that satisfaction with the service is likely to support continued growth in the market share of these services.

Figure 49. Problems experienced with ride share use Feb 17 and Nov 16



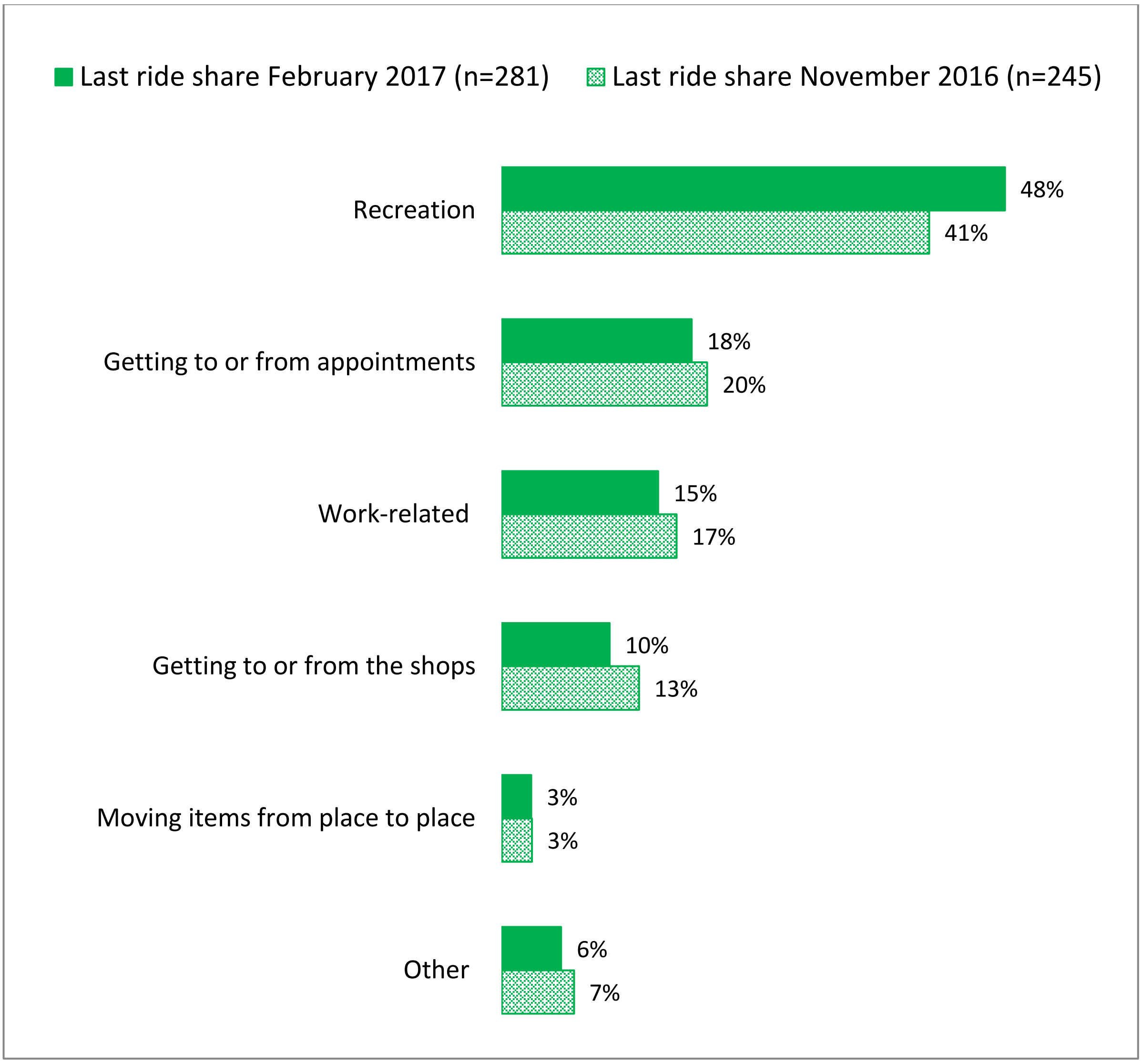
Q40RSA Problems I have experienced in the last 12 months include: (can choose more than one) with verbatim "other" replies coded.

6.11. Main purpose of the last ride share trip

The reported purpose of the last ride share trip is most likely to be recreation (41% to 48% - see Figure 50), followed by getting to and from appointments (18% to 20%), and shopping (10% to 13%). A few use ride share to move items from place to place.

Recreational purposes are even more dominant for ride share trips than for taxi trips (see Figure 31 for taxi results). Travelling to and from appointments and work-related purposes are fairly close to each other (as for taxis), but somewhat less often selected for ride share. As for taxis, shopping

Figure 50. Main purpose of last ride share trip Feb 17 and Nov 16



Q20RS My main purpose in taking my most recent ride share trip in Sydney was Work-related (including getting home from work)
Getting to or from appointments / Getting to or from the shops / Recreation (such as entertainment, social visits, 'going out', including getting back home) / [2016 ONLY] Moving items from place to place Other (such as education related)

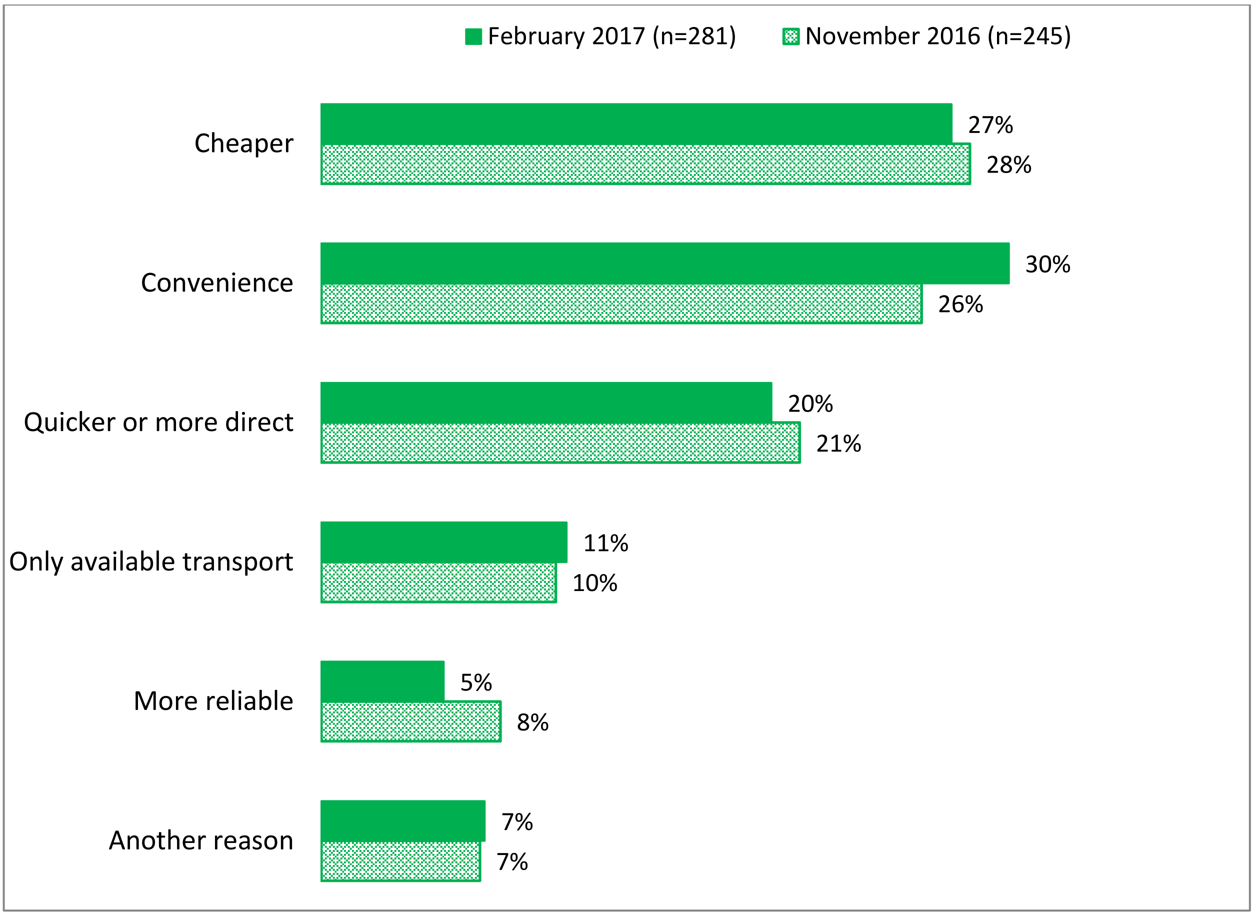
6.12. Main reason for using ride share

When asked to select the reason for using ride share rather than some other transport mode, the sample of ride share users was most likely to report convenience (26% to 30%), being cheaper (27% to 28%) or being quicker or more direct (20% to 21%) as the reason for selecting ride share (see Figure 51). Some indicated that ride share was the only available form of transport (10% to 11%) and few that it is more reliable than alternative (5% to 8%).

Being cheaper is much more likely to be selected by ride share users (27% to 28%) than by taxi users (6% to 7% – see Figure 31 for the results for taxis).

Perhaps as a result, some other reasons were more often selected for taxis than for ride share: convenience (34% for taxis in both Waves, 26% and 30% for ride share); being quicker or more direct (26% to 30% for taxis, 20% to 21% for ride share); and being the only available option (18% to 21% for taxis, 10% and 11% for ride share.

Figure 51. Main reason for last using ride share Feb 2017 and Nov 2016



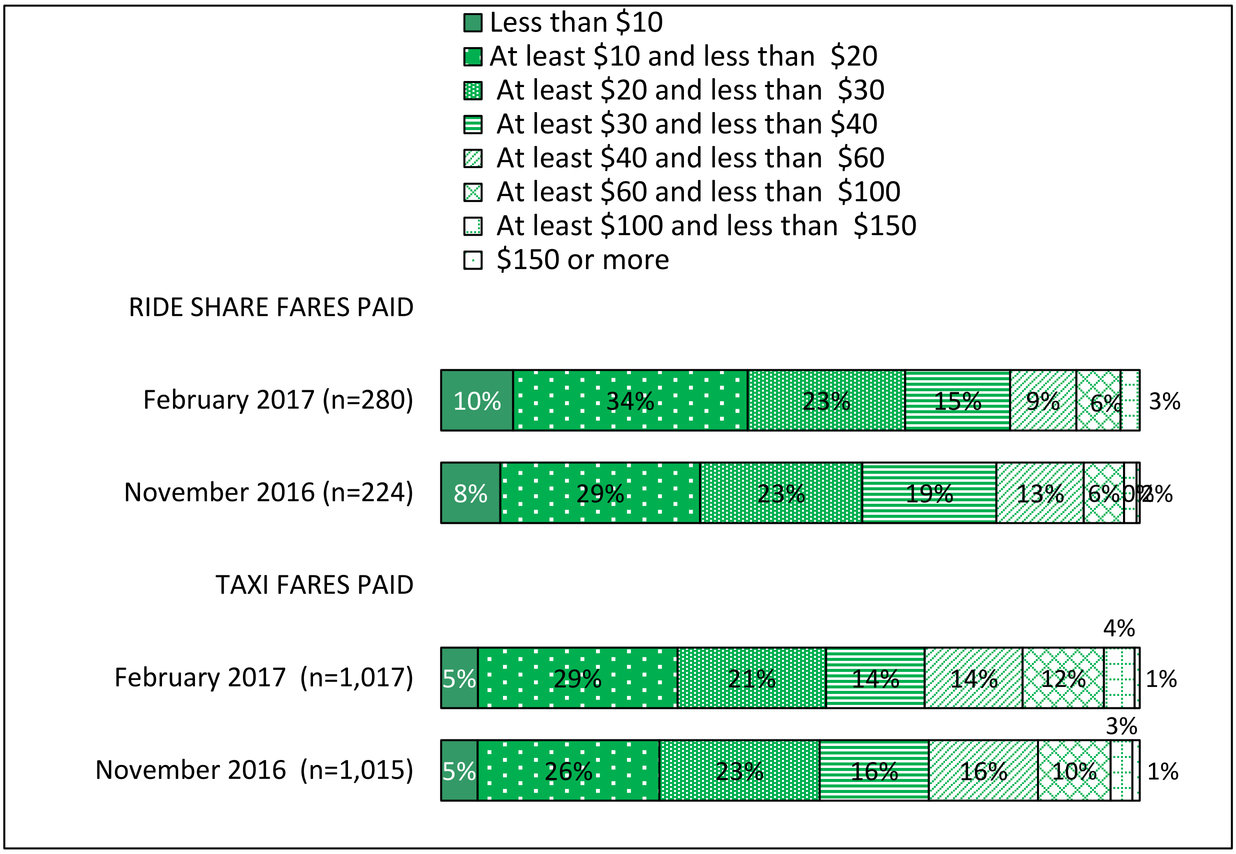
Q21RS The main reason I took a ride share / taxi] instead of other transport options was ... Convenience (for example, I didn't have to worry about parking, I had luggage, I didn't want to get wet) / Was quicker or more direct / Was cheaper / I didn't have access to any other transport options / Another reason

6.13. Amount paid for last ride share trip

Only 19% to 21% of those able to recall the fare paid on their last ride share trip in November 2016 and February 2017 reported paying $40 or more, compared to 30% to 31% of those ale to recall the fare paid on their last taxi trip (see Figure 52). While 60% to 66% paid under $30 for their last ride share trip, 54% to 55% paid under $30 for their last taxi trip. Thus the estimated median fare for the ride share trips is around $23 in February 2017 and $25 to $26 in November 2016[2], while for taxis it is around $28 in both these survey Waves.

Those taking a trip by ride share appear to have paid less than those taking a taxi trip. This might confirm the perception that ride share is cheaper than taxis, but to firmly draw this conclusion requires checking on the fare paid broken down by the distances travelled.

Figure 52. Amount paid on last ride share and taxi trip Feb 2017 and Nov 2016



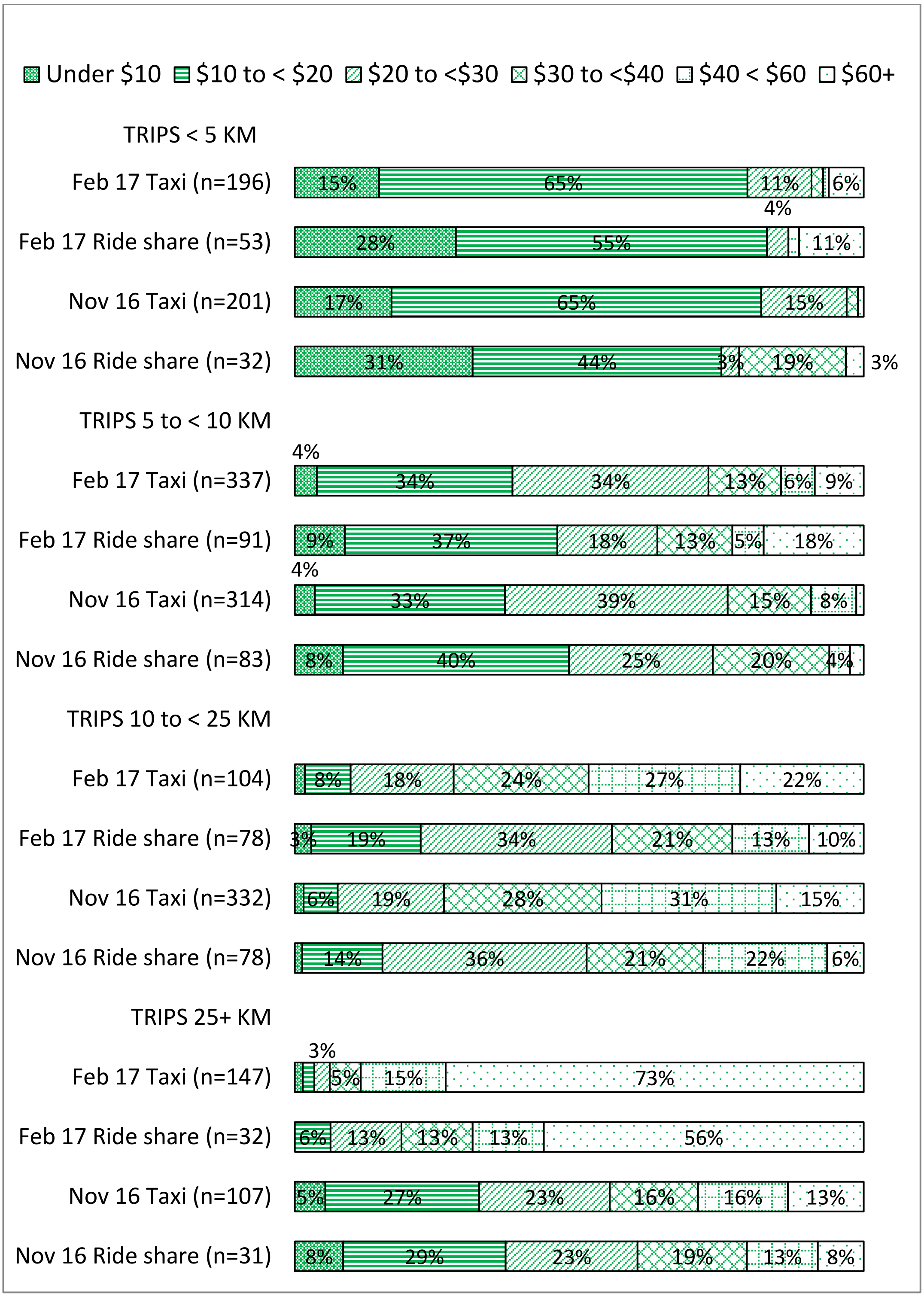
Q26/Q26RS The fare, including any service fee for electronic payment, was ...

[2] In the November 2016 report, the median ride share fare was incorrectly reported as $34, higher than the median taxi fare. The correct value is between $25 and $26.

Figure 53 confirms that when controlled by the distance travelled, in February 2017 and November 2016, the fare paid was lower for ride share trips of a given length than for taxi trips of the same length.

The common belief that a ride share trip will generally be cheaper than a taxi trip for the same journey is confirmed by these analyses.

Figure 53. Fare paid by distance travelled for ride share and taxi trips Feb 2017 and Nov 16



Taxis: Q26, Ride share Q26RS.The fare, including any fee for electronic payment, was …
by Taxis Q16 / Ride share Q16RS My most recent taxi/ride share trip was …
Where the percentage giving a reply was 2% or less, the value is not shown. All values of 3% or more are shown.

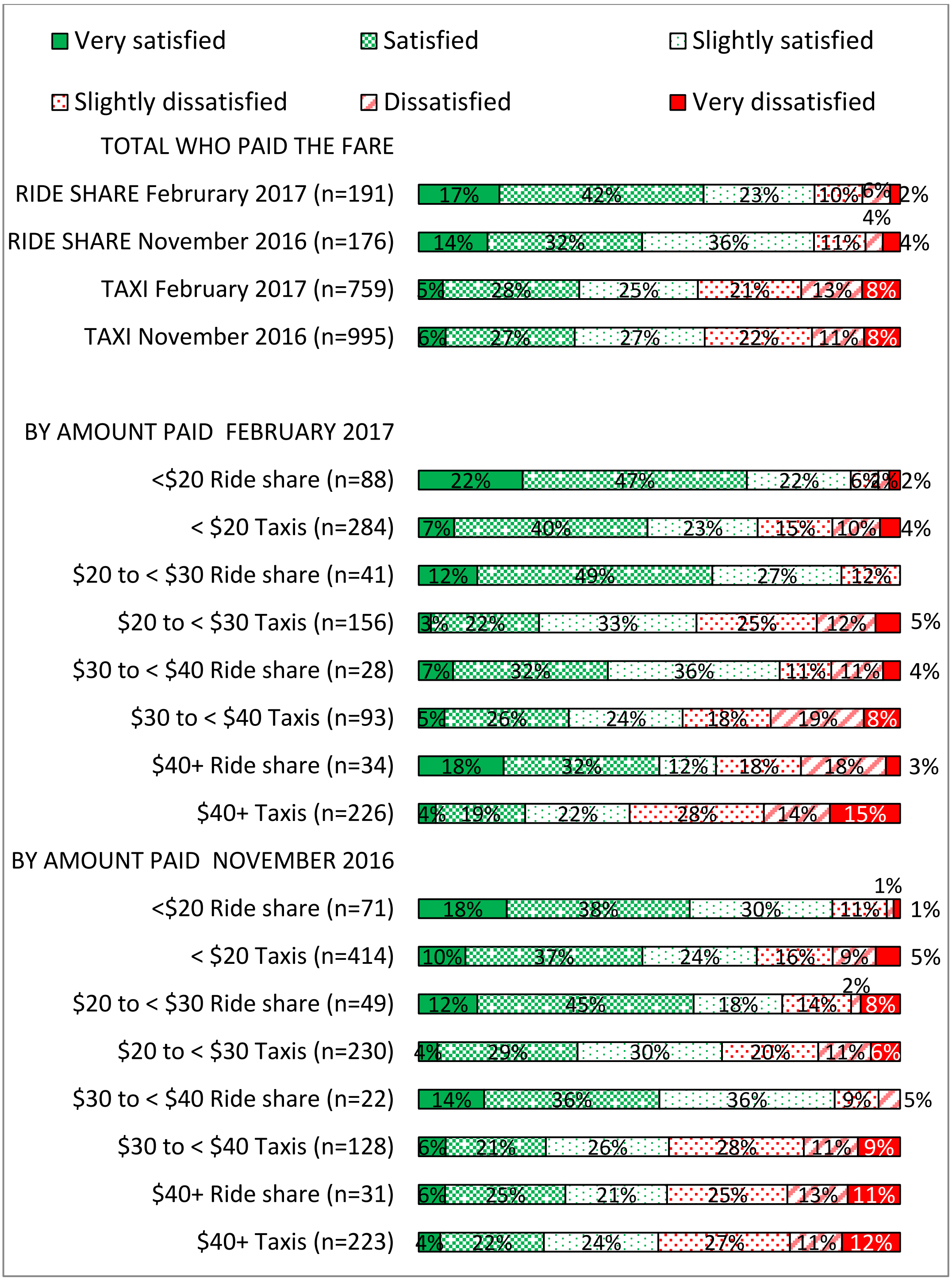
6.14. Satisfaction with ride share fare paid

As Figure 54 shows, among those asked to rate how satisfied they are with the fare paid on their last ride share trip 82% were satisfied (slightly to very) in both survey Waves. These are significantly higher than the 58% and 59% satisfied with the fare paid for the last taxi trip taken in those survey Waves.

The percentage who rated the fare paid for the last ride share trip as very satisfactory or satisfactory was significantly higher in February 2017 (59%) than in November 2016 (46%). Both are significantly higher than for the last taxi trip fare the corresponding Wave (33% and 32%).

It can be concluded that ride share users are more satisfied with the fares paid than are taxi users.

Figure 54. Satisfaction with ride share fare paid by amount paid Feb 2017 and Nov 2016



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

Ride share Q29RS

NOTE: Results based on samples of <50 should be treated with caution. Results for samples of <20 are not shown.

7. Car share services

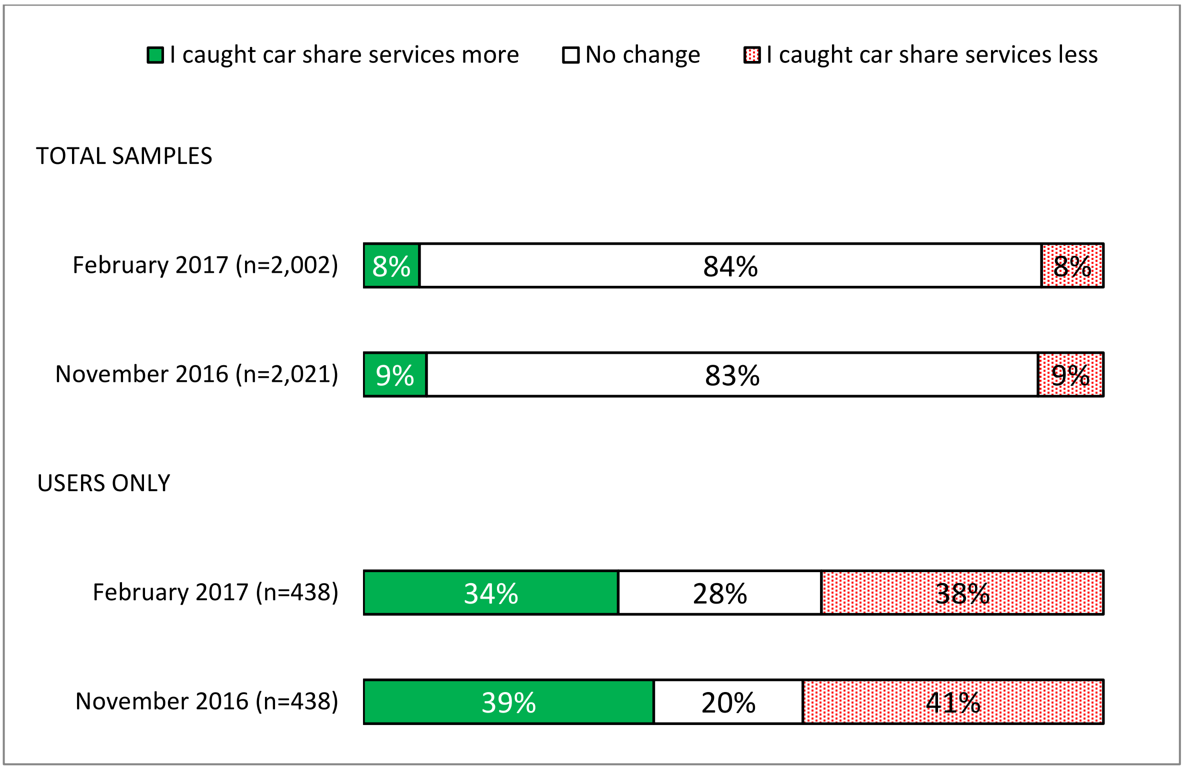
Respondents were also asked additional questions about their use of, beliefs about and attitudes to car share services.

This section of the report summarises the replies to these questions.

The prevalence and frequency of using car share services has already been reported (see section 4.4). In summary, it appears that the prevalence of use might be stabilising at around 22%, and the frequency of use among users is similar to the frequency of use of taxis and of ride share services among users of those services.

The percentages of the total sample reporting increased use are similar to the percentages of the total sample reporting decreased use (see Figure 55). This is of course equally true among car share users although the percentages are much higher. This is consistent with the fairly stable prevalence of use.

Figure 55. Change in frequency of car share use – past year from previous year by survey Wave



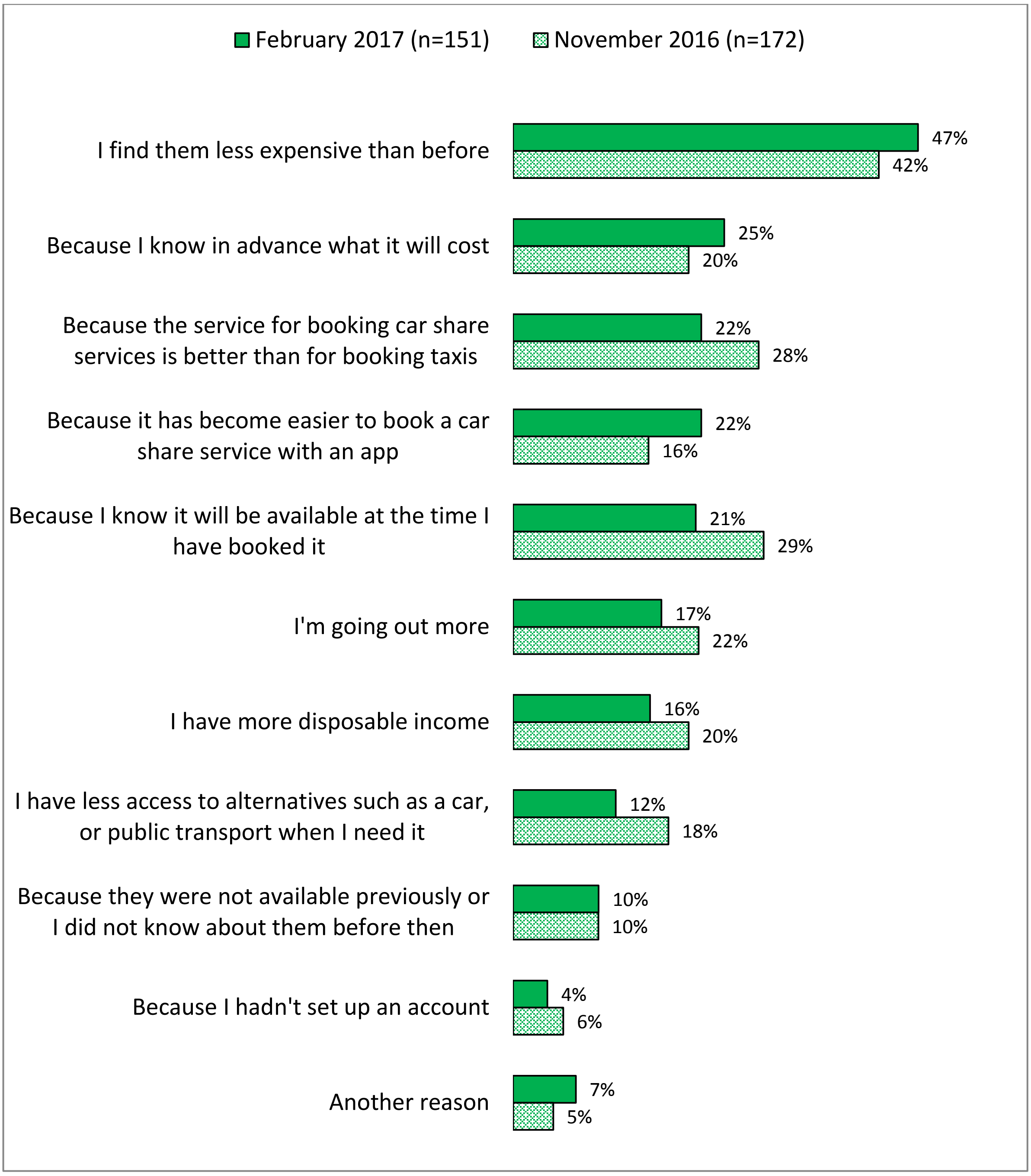
Q48b. Compared to the previous 12 months, in the last 12 months ….
I used car share services more/ I used car share services less/ There has been no change in how often I have used car share services

7.1. Reasons for increasing car share use

Car share users surveyed in November 2016 and February 2017 reporting they had made more use of car share services in the past twelve months than in the previous year were asked to select their reasons for increasing use from a list. Figure 56 shows the distribution of replies.

The dominant reason selected was finding car share services less expensive than before, given by almost half those asked (42% and 47%). Other reasons given in in both survey Waves by between 20% and 30% of those asked were knowing the cost in advance, finding booking a car share service easier than booking a taxi, and knowing it will be available when booked. Finding it easier to book a car share service with an app increased to 22% in February 2017 from 16% in November 2016. These reasons, largely relating to convenience and reliability account for most of the other reasons given. Increased need (going out more, and having less access to alternative transport modes) and capacity (having more disposable income) were selected somewhat less often, Only 10% in either Wave reported they were now using car share services because these had become available where they live.

Figure 56. Reasons for increased frequency of car share use by Feb 17 and Nov 16



Q48c. I used car share services more frequently because (can choose more than one) …

7.2. Reasons for using car share services less often

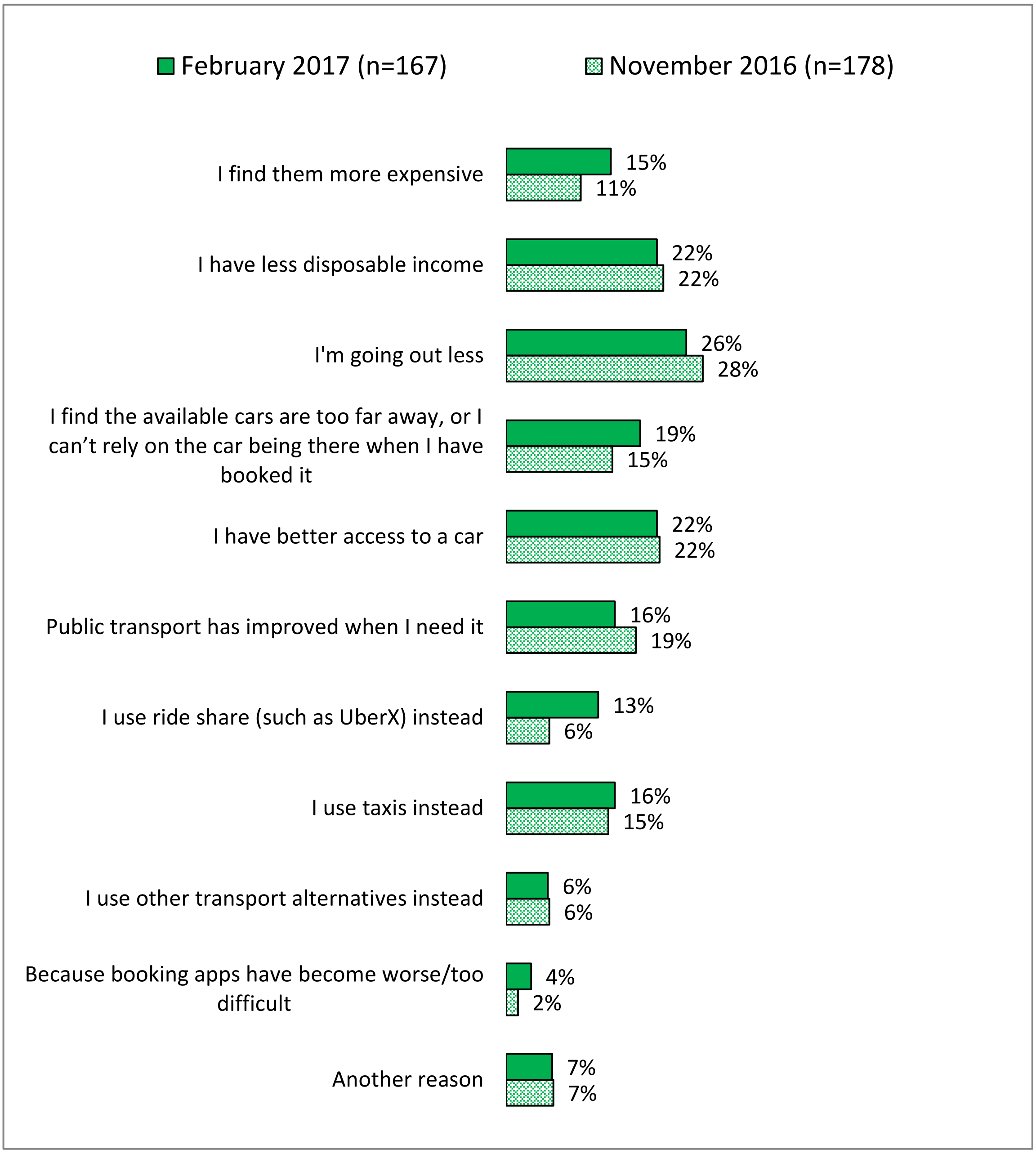
Those saying they had used car share services less often in the past twelve months than in the previous year showed a wide variation in the reasons they selected. The most common showed a reduced need (going out less 26% to 28%; having less disposable income, and having better access to a car, both 22% in both Waves; improved public transport, 19% and 16%).

Finding the available cars too far away or not there when the time came to pick up was reported by 15% to 19%.

Finding them more expensive (11% and 15%), using taxis instead without any reason for why this was done (15% to 16%) were the other main reasons.

Using ride share increased from only 6% in November 2016 to 13% in February 2017.

Figure 57. Reasons for decreased frequency of car share use by Feb 17 and Nov 16

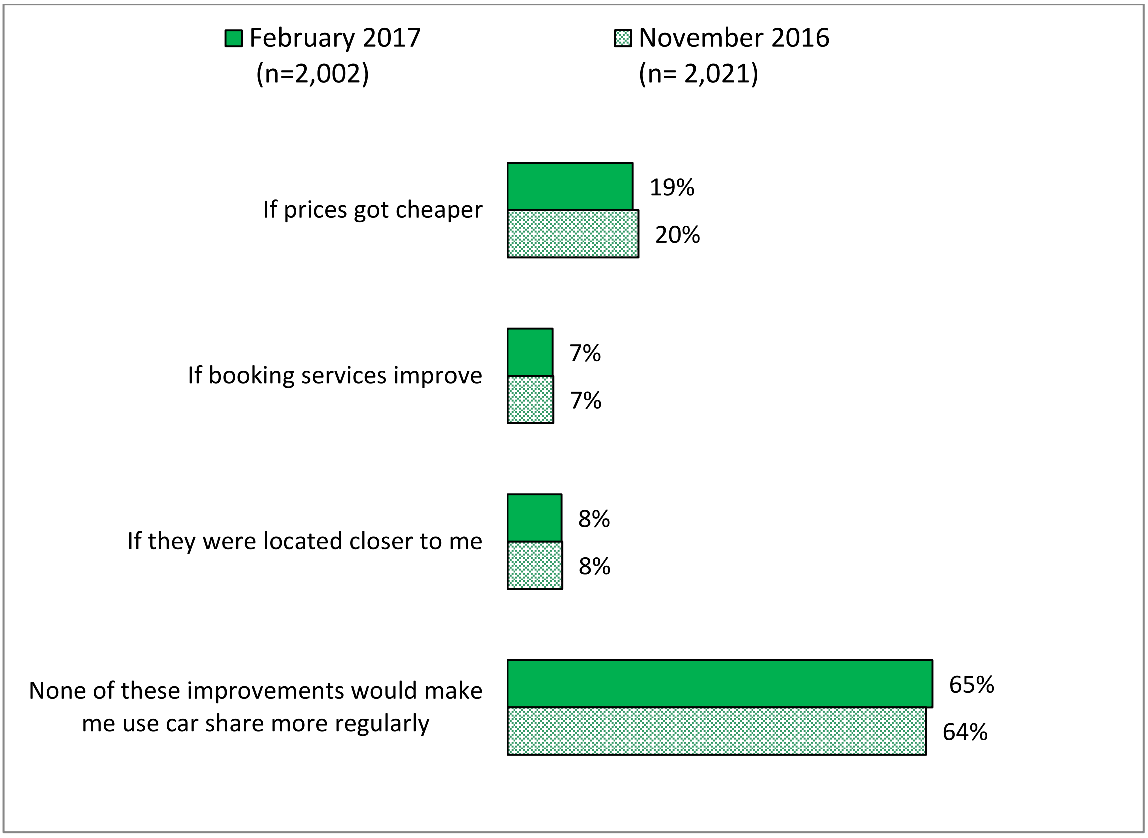


Q48D. I used car share services less frequently because (can choose more than one) …

7.3. Most likely to increase car share use

All respondents were asked which (if any) of three improvements would be most likely to increase their use of car share services. Figure 58 shows that most respondents would not increase use for any of the three (64% to 65%). Cheaper prices (19% to 20%), are more likely than the services being located closer to home (8% in both Waves) or improved booking services (7% in both Waves) to motivate increased use.

Figure 58. Most likely to increase car share use in the next year by survey Wave

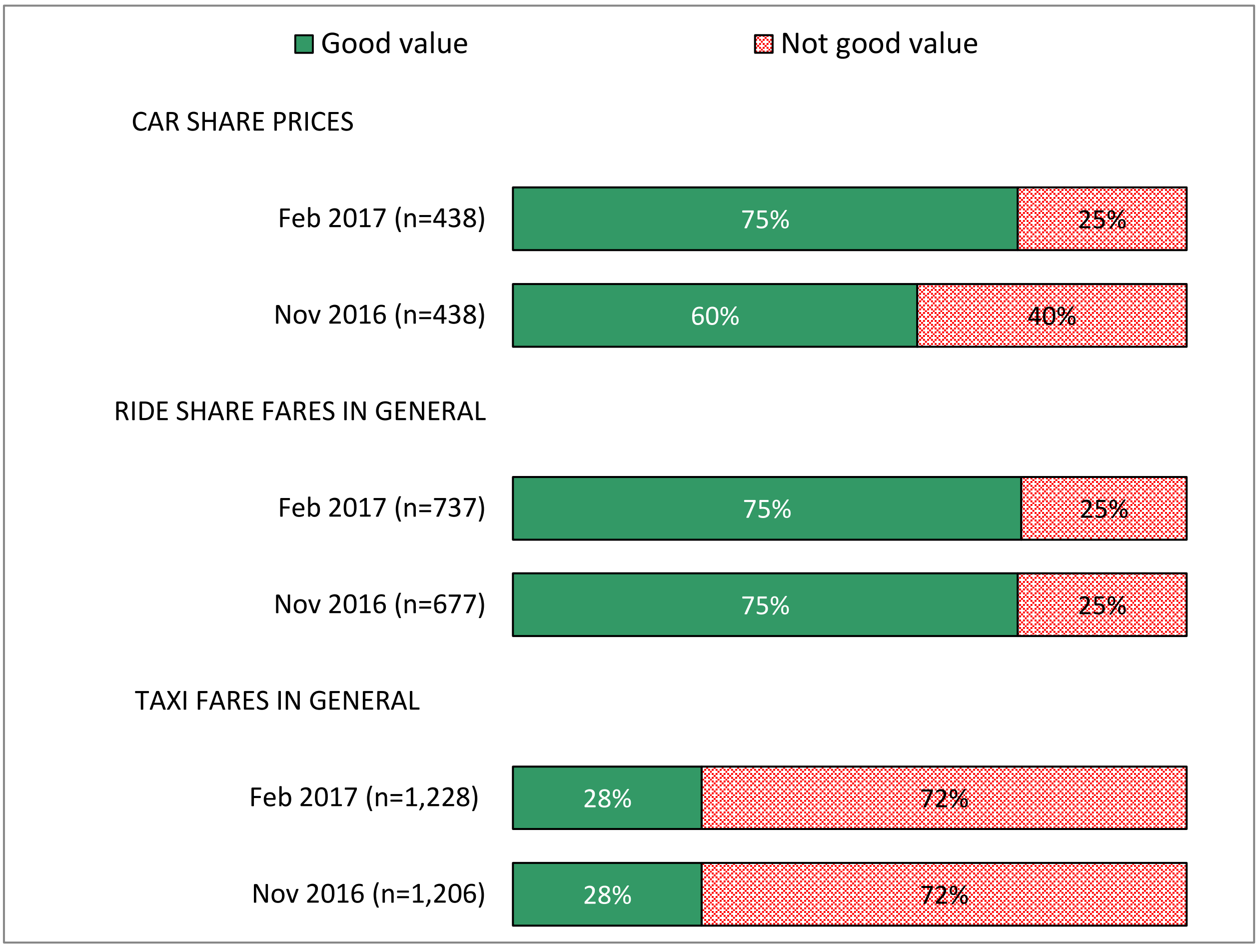


Q48E. In the next 12 months, the thing that is most likely to get me to use car share more regularly is: (pick only 1)

7.4. Value for money of car share services

All car share users were asked whether car share services are good value for money or not good value. The percentage saying they are good value for money is significantly higher in February 2017 (75%) than in November 2016 (60%), and matches the 75% found in both waves for ride share services among ride share users. All are significantly and substantially higher than the percentage of taxi users who consider taxi fares good value for money (28% in both Waves).

Figure 59. Value for money of car share trips by survey Wave



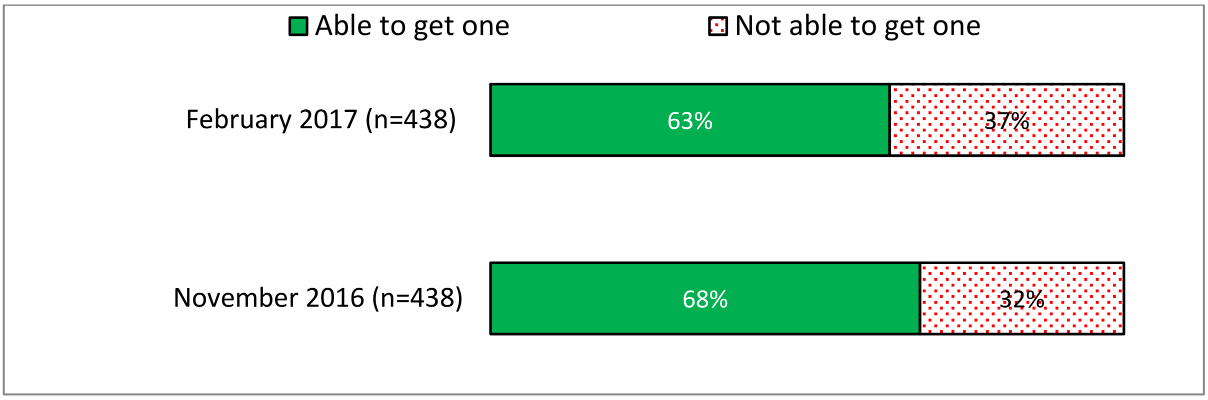
Q48F. Overall, I think: 1. Car are prices are good value for money / 2. Car share prices are not good value for money
Q49F. Overall I think 1. Ride share fares are good value for money / 2. Ride share fares are not good value for money
Q4: Overall I think taxi fares are 1. Good value for money / 2. Not good value for money

7.5. Being able to get a car share

Figure 60 shows that around two in three car share users were able to get a car share the last time they tried to get one, but 32% and 37% were not able to get one. This compares to 24% to 25% for taxis (see Figure 18) and 16% to 21% for ride share services (see page 86).

It appears that there might be greater difficulty in obtaining a car share service when one is wanted than for taxis and for ride share services.

Figure 60. Being able to get a car share when wanted one by survey Wave



Q48g. When I last tried to get a car share I was: 1. Able to get one when I wanted 2. Not able to get one when I wanted

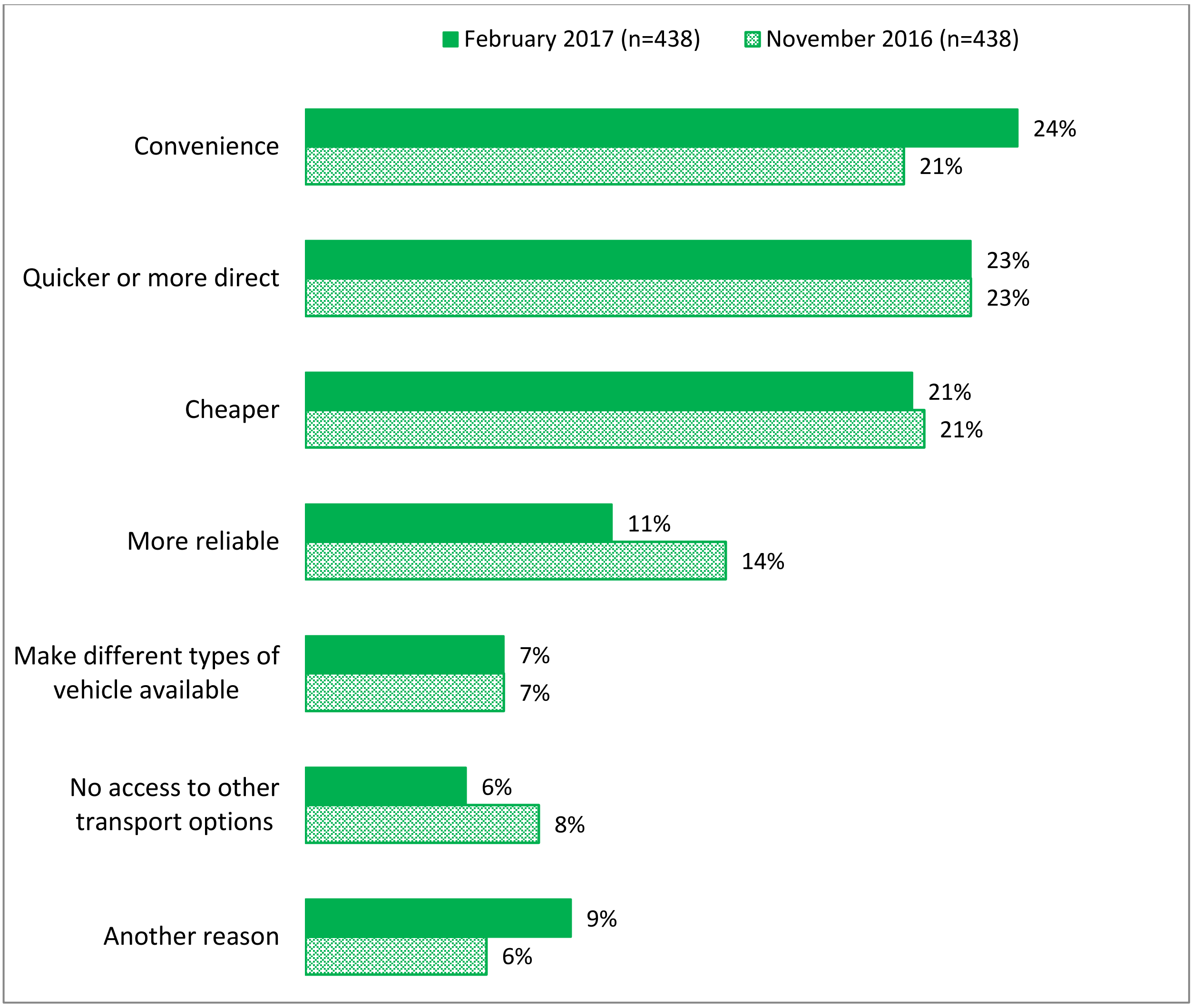
BASE: Car share users

7.6. Main reason for using a car share service

Three reasons dominated the explanation selected by car share users for their use of car share services (see Figure 61): convenience (21% to 24%), being quicker or more direct (23% in both Waves) and being cheaper (21% in both Waves). Being more reliable (11% to 14%), having no access to other forms of transport (6% to 8%) and making different types of vehicle available (7% in both Waves) were selected by a few, and a few had other reasons not listed (6% and 9%).

While being cheaper than alternatives is one of the major reasons, it is not as dominant for car share services as it is for ride share.

Figure 61. Reason for last using car share by survey Wave



Q48g The main reason I took a car share for this journey instead of other transport options was … 1. Quicker or more direct / 2. Convenience (for example, I didn't have to worry about parking, I had luggage, I didn't want to get wet) / 3. Cheaper than alternatives / 4. I didn't have access to any other transport options / 6. More reliable than alternatives / 7. Makes different types of vehicle (like a van, ute or luxury car) available / 5. Another reason

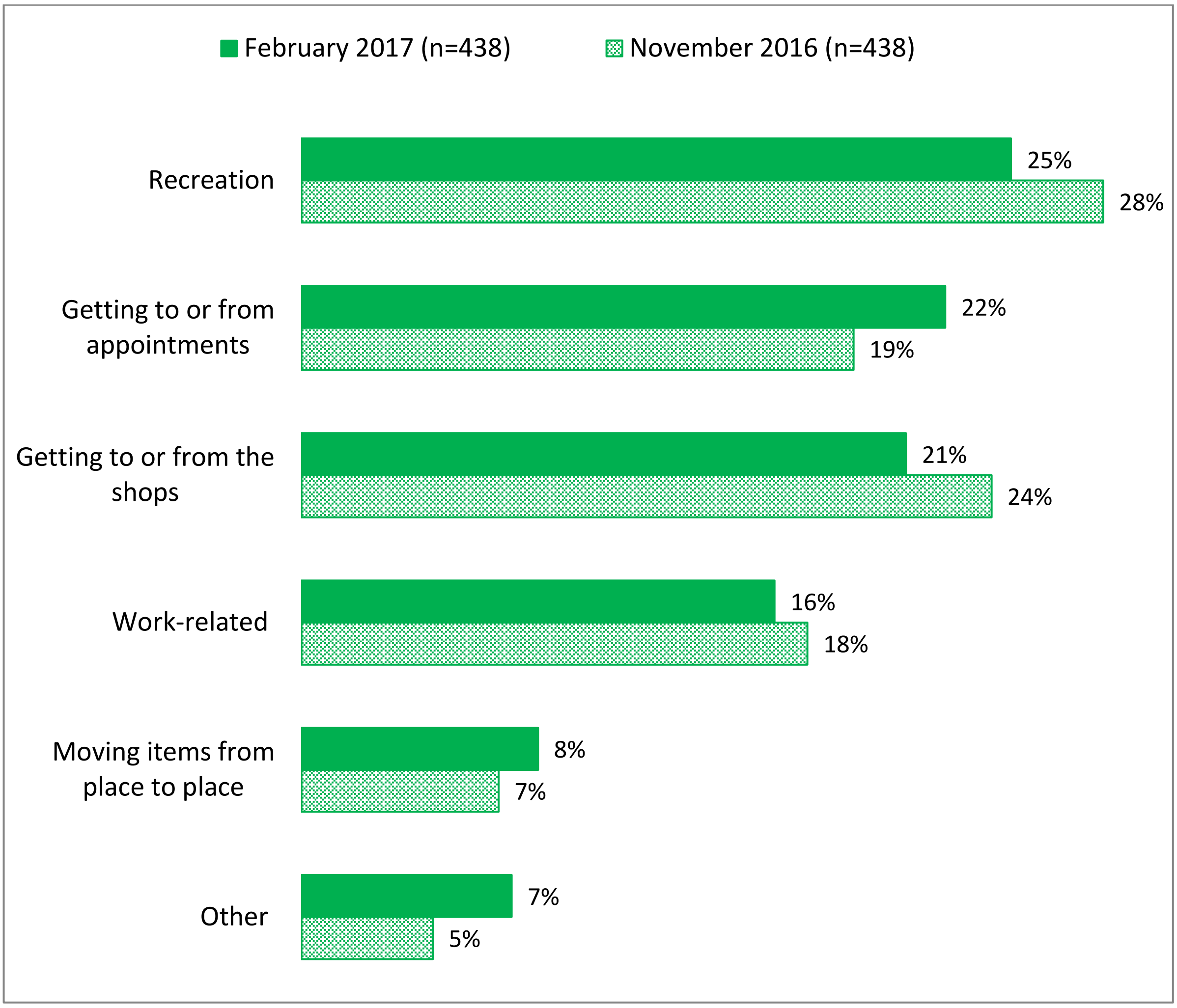
7.7. Main purpose of the last car share trip

While some car share use is work related (16% to 18%), most of the most recent car share trips were recreational (25% to 28%), to go to or from shops (21% to 24%) or to get to or from an appointment (19% to 22%) as shown in Figure 62. Moving things from place to place was an uncommon purpose (7% to 8%).

Socialising or recreational use was less often selected for car share use (25% to 28%) than for taxi use (38%) or ride share use (41%), and moving things from place to place was more often selected (7% compared to 2% to 3% for the other modes). The other purposes were also less often selected for taxis and ride share, being displaced by recreational use.

Use of car share services thus appears to be more task oriented than use of taxis or ride share services.

Figure 62. Main purpose of car share use by survey Wave



Q48l. My main purpose in taking my most recent car share trip in Sydney was ...
Work-related (including getting home from work)
Getting to or from appointments / Getting to or from the shops / Recreation (such as entertainment, social visits, 'going out', including getting back home) / [2016 ONLY] Moving items from place to place / Other (such as education related)

7.8. Amount paid for car share use

The amount paid for the last car share trip was almost as likely to be $40 or more (29% to 30% – see Figure 63) as the amount paid for the last taxi trip (30% to 31%), and more likely to be this high than the last ride share trip (19% to 21%). Fares below $20 were also less common for car share trips (22% to 25%) than for taxi trips (31% to 34%) and for ride share trips (37% to 44%).

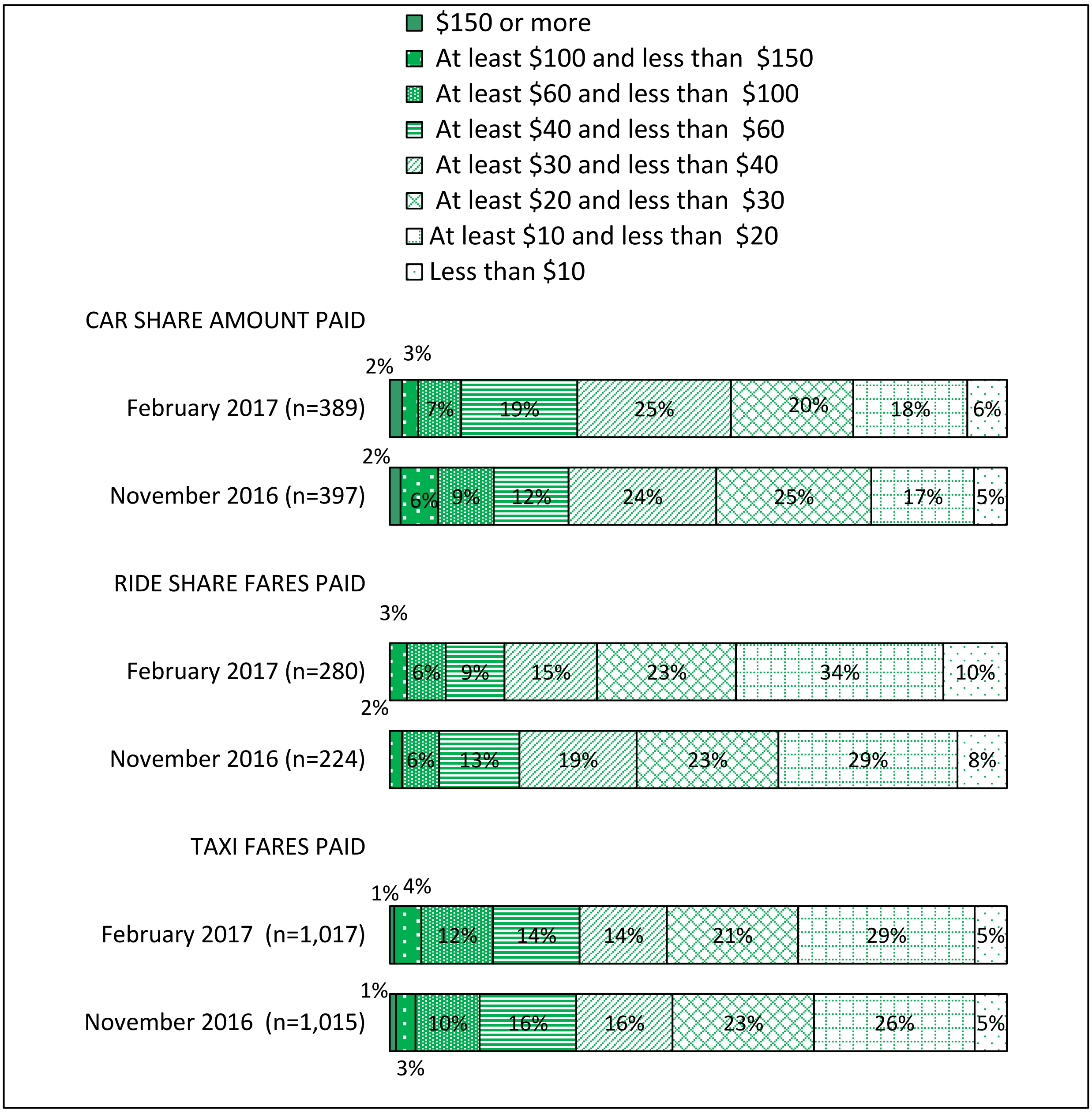
The median amount paid for the last car share trip was just over $31 (November 2016) to just over $32 (February 2017).

Car share users thus are spending about as much as taxi users, and more than ride share users.

Thus, although some car share users take this service because they believe it is cheaper than other modes, from the data obtained, it appears it is not.

Car share services might be used for multiple trips in the one use charge, as the car might be retained between different legs of the total journey. Thus the apparently higher cost of car share trips might be due to differences in the distance travelled, the length of time the shared car is used, or the journey in a car share including time between the different legs of the total trip. It thus might need to be compared to two or more trips by taxi or by ride share. If car share use could be compared to taxi and ride share trips of similar duration, waiting time between trips taken and distance covered, the difference in cost might be smaller.

Figure 63. Amount paid for last car share trip by survey Wave



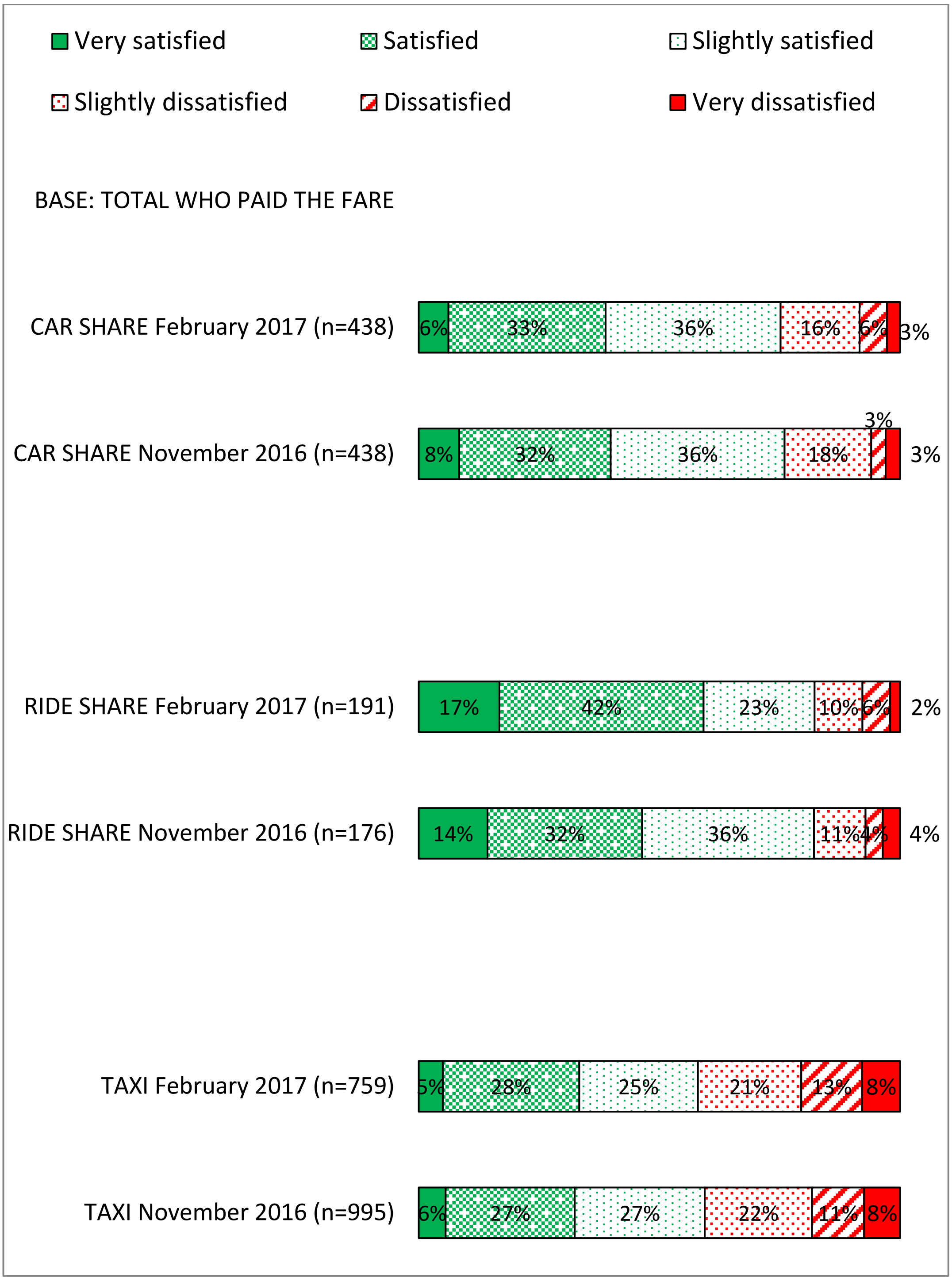
Q26/Q26RS The fare, including any service fee for electronic payment, was ...

7.9. Satisfaction with the amount paid for car share use

Most car share users were at least slightly satisfied with what they paid for their last car share trip (75% to 76%) and 39% to 40% were satisfied or very satisfied (see Figure 64). The total percentage at least slightly satisfied (75% to 76%) is slightly below the percentage for ride share users (82% in both Waves) and significantly and substantially higher than for taxi users (58% to 59%). The percentage of car share uses either satisfied or very satisfied (39% to 40%) is significantly lower than for ride share service users (46% in November 2016 and 59% in February 2017) and significantly higher than for taxi users (32% to 33%).

These results align quite well with the perceptions of value for money being highest for ride share, with car share somewhat lower and taxis much lower.

Figure 64. Satisfaction with car share amount paid by survey Wave



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

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

8. Other point to point services

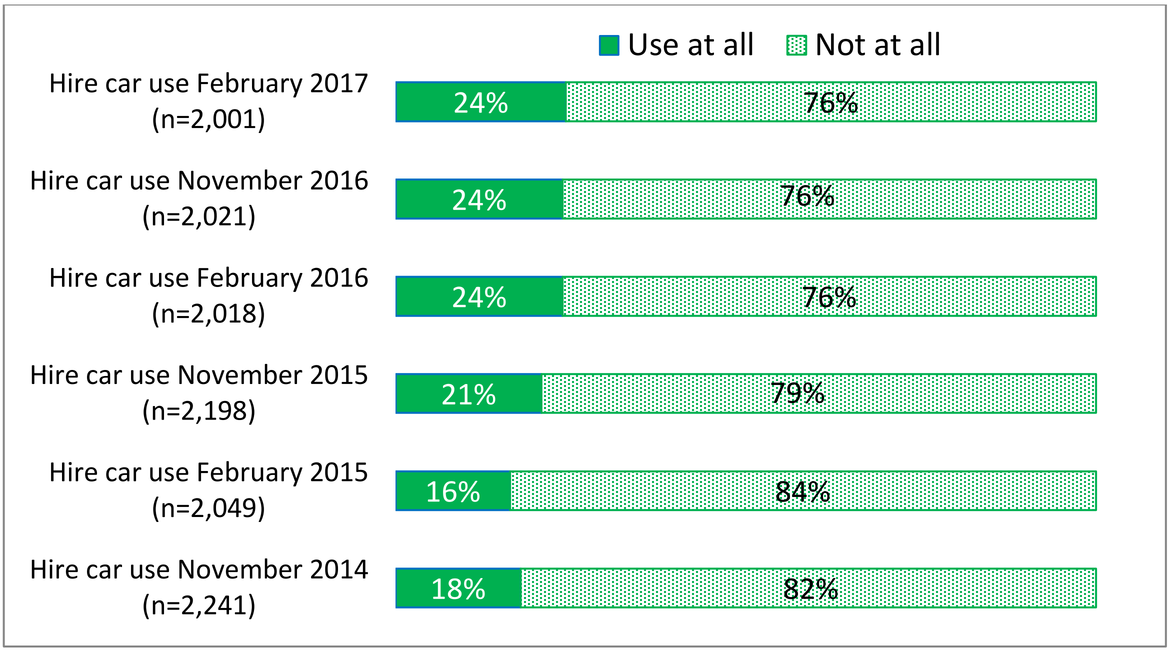
In this section we summarise the replies given to questions asked about using hire car services, courtesy transport and community transport.

8.1. Hire car services

The prevalence of using a hire car in the past six months is shown by survey Wave in Figure 65. These results have already been shown in comparison to other paid point to point transport modes Figure 1.

Prevalence of use is significantly but only slightly higher in the three most recent survey Waves (24%) than in November 2014 and February 2015 (16% to 18%). The increase of six to eight percentage points is not large and prevalence appears to have stabilised.

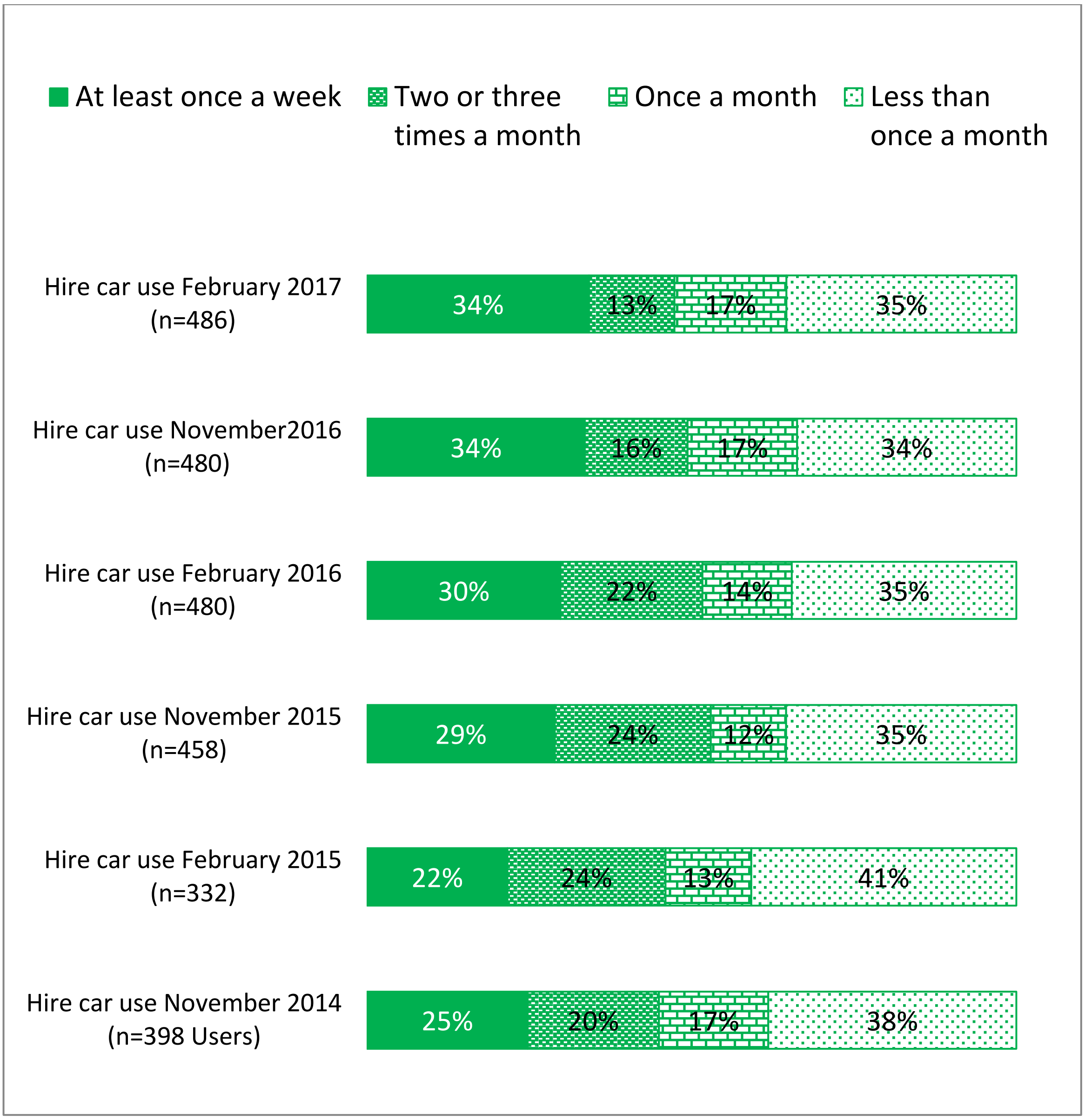
Figure 65. Prevalence of using hire car in last six months by survey Wave



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

The frequency of hire car use among users shows a trend for use once a week or more often to have increased, but appears to have stabilised at 34% in the two most recent survey Waves. Use less than once a month has been quite stable for the last four survey Waves at 34% to 35%, but somewhat lower than in November 2014 and February 2015 (38% to 41%). The increases in weekly use (of around nine to twelve percentage points) are statistically significant, while the decreases in using less than once a month (of three to six percentage points) are not. However, it appears that those who use hire cars are using them more often (but has now stabilised), as well as there being some (now stabilised) growth in the prevalence of use.

Figure 66. Frequency of using hire car in last six months by survey Wave (users only)

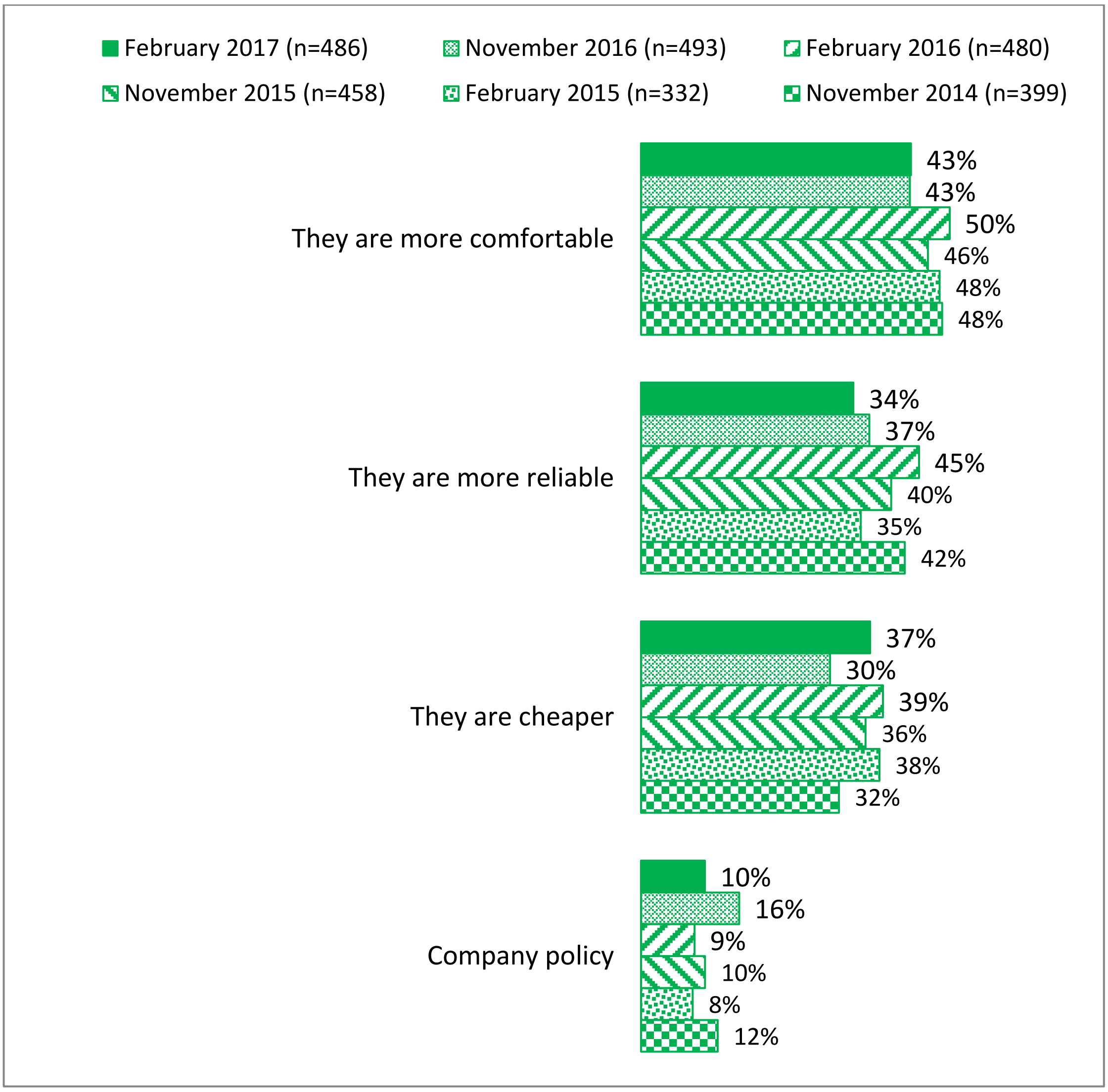


Q42. In the last six months I have used a hire car with a driver … (Base: Users)

The reasons given for using a hire car instead of a taxi are summarised in Figure 67. Comfort (43% to 50% of users), reliability (34% to 45%), and being cheaper than taxis (30% to 39%) dominated the replies, with a few (8% to 16%) attributing use to company policy.

There were no evident trends for either a "seasonal" effect, or for a trend for any reason to increase or decrease over the successive Waves.

Figure 67. Reasons for using a hire car by Survey Wave



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

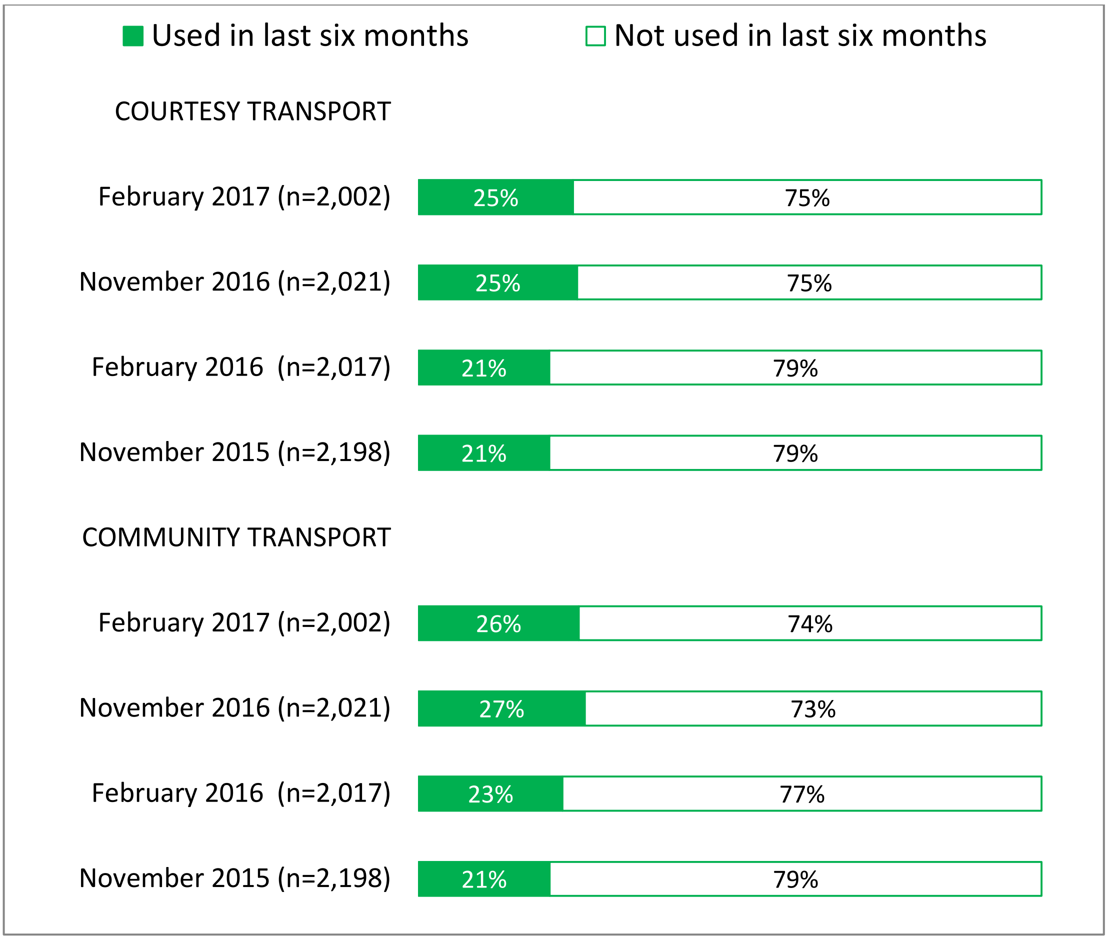
8.2. Use of courtesy and community transport

Courtesy transport is provided to assist people when their private vehicle is not available for example when their private vehicle is being serviced or repaired, or by some entertainment venues to help patrons to reach their homes without driving when they have been drinking alcohol or for patrons who have difficulty using public transport due to age or disability. Community transport is provided by community organisations for people with special transport needs or who lack access to a private vehicle for trips that would be difficult to take by public transport. Both are usually provided free of charge.

The prevalence of use by survey Wave is shown in Figure 68. Between one in five and one in four respondents report having used each of these two free point to point transport modes in the past six months, similar to the prevalence of using hire cars and car share services, but below the level recently reached for ride share services.

Over the four survey Waves in which this question has been asked there has been a small trend for the prevalence of use of these services to have increased by four to six percentage points. Although the changes are small they are statistically significant. There is little or no difference between the results for November and the following February. Whether the trend for increasing prevalence of use will continue is unclear, as we effectively only have two data points, given the lack of change between November and February Waves.

Figure 68. Prevalence of using other point to point services in the past six months by survey Wave



Q51. In the last six months I have used courtesy transport provided by a pub, club or other venue....
Q53. In the last six months I have used community transport (provided in a vehicle other than a taxi)…

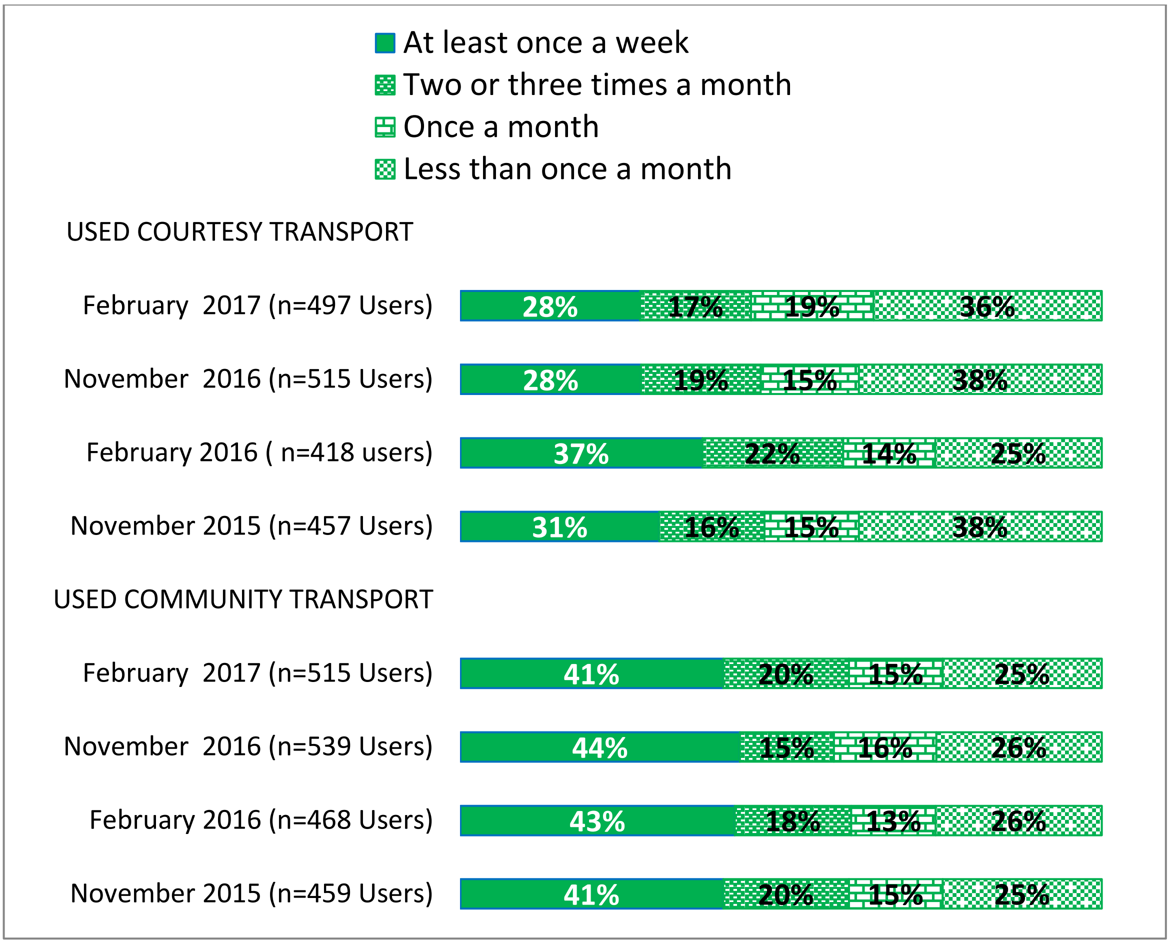
Figure 69 shows the frequency of using each service for the four most recent survey Waves.

The only significant difference is a higher frequency of use of courtesy transport in February 2016 than in the other survey Waves. Otherwise, the reported frequency of use is very similar across survey Waves for both courtesy transport and community transport.

Courtesy transport is about as likely to be used once a week or more often as the paid modes of point to point transport, and users of community transport are somewhat more likely to do so at least once a week than other forms of point to point transport.

In the last four survey Waves, 41% to 44% of community transport users report using at least once a week, compared to 23% to 26% of taxi users doing so in these four Waves (see Figure 4), 30% to 39% of ride share users (see Figure 8), 33% to 39% of car share users (see Figure 9) and 29% to 34% of hire car users (see Figure 66).

Figure 69. Frequency of using courtesy transport and community transport services in last six months (users only)

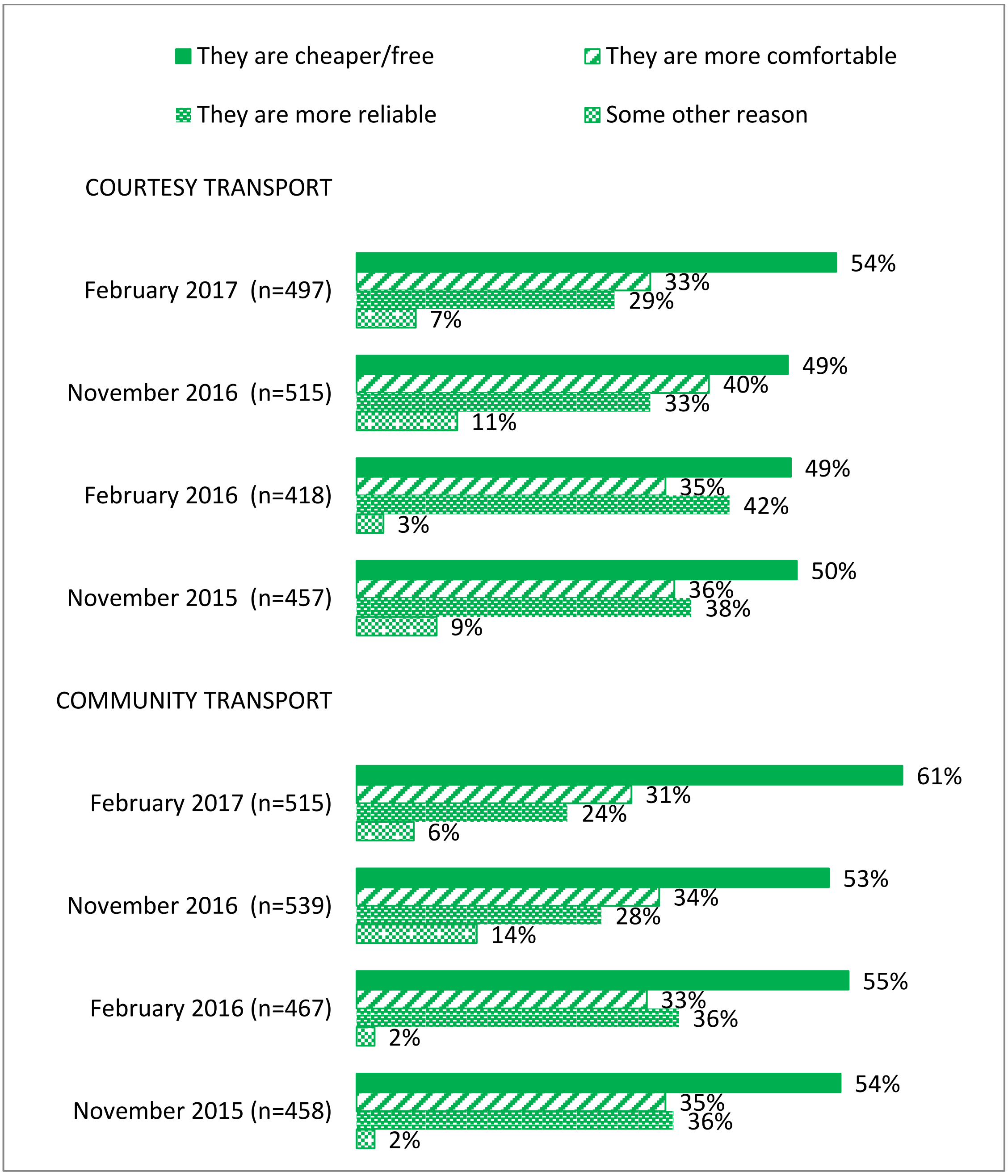


Q51. In the last six months I have used courtesy transport provided by a pub, club or other venue

Q53. In the last six months I have used community transport instead of a taxi ….

The reasons given for using courtesy transport and community transport shown in Figure 70 are dominated by the service being cheaper or free. (49% to 54% for courtesy transport, and 53% to 61% for community transport). Comfort and reliability were endorsed by quite variable percentages of users (29% to 42%) with no apparent patterns over survey Waves, and neither being consistently more often endorsed than the other. Very few indicated that they have any other reason for using these transport modes.

Figure 70. Reasons for using courtesy transport or community transport



Q52 I used the community transport service because …
Q54 I used the courtesy transport service because …
NOTE: Q52 and Q54 were introduced in November 2015. In November 2016, the probe to identify those choosing the option "Because it was free" was not included, and these replies are covered by the "Some other reason" option..

9. APPENDIX 1: The questionnaire

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

5180 IPART TAXIS SURVEY Version: 10

INTRO

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

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

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

About Taverner Research

Who are we/Privacy Policy

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

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

Thank you in advance for taking part.

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

INITIAL DEMOGRAPHICS

PREAMBLE:

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

Q1DEM (GENDER) I am…

1. Male
2. Female

Q2DEM (AGE GROUP) I am aged…

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

Q3DEM (LOCATION) What is the postcode where you live?

NUMERIC (4 DIGITS ONLY)

Q3M (AREA) Hidden variable to capture location

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

FOR DEFINITION OF CODE 1 (SYDNEY) SEE FOLLOWING LIST

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

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

Q4DEM (OCCUPATIONAL STATUS) **I am…**

MULTIPLE RESPONSE

1. Working full-time
2. Working part-time
3. Full-time student
4. Part-time student
5. Unemployed
6. Household duties / caring for children
7. Retired
8. Disability / defence veteran or aged pensioner
9. Other

Q3PRE

**SHOW ALL

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

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

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

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

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

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

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

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

Compared to the previous 12 months, in the last 12 months

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

SHOW Q2A IF 1 AT Q2

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

MULTIPLE RESPONSE

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

SHOW Q2B IF 2 AT Q2

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

MULTIPLE RESPONSE

1. I find them more expensive
2. I have less disposable income
3. I'm going out less
4. Because I find I have to wait longer to catch a taxi, or I can't rely on the taxi turning up after I have booked it
5. I have better access to a car
6. Public transport has improved when I need it

11. I use ride share (such as UberX) instead
12. I use car share, hire car, community transport or courtesy buses instead

7. Because booking services have become worse
8. I think drivers have become more inclined to take longer routes or overcharge me
9. I have found that driver behaviour and knowledge has become worse in [Q3M]
10. For another reason

TAXI USE

SHOW Q2C IF 1 OR 2 AT Q4DEM

Q2C (WORK TAXI POLICY) My workplace…

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

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

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

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

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

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

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

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

IF Q1 = 7 GO TO Q13

IF Q1 = 1-6 GO TO Q4

<u>THOSE WHO USED TAXI IN PAST 6 MONTHS</u>

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

RANDOMISE

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

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

RANDOMISE CODES 1 AND 2 ONLY

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

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

RANDOMISE CODES 1 AND 2 ONLY

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

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

RANDOMISE CODES 1 AND 2 ONLY

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

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

RANDOMISE CODES 1 AND 2 ONLY

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

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

RANDOMISE CODES 1 AND 2 ONLY

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

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

RANDOMISE CODES 1 AND 2 ONLY

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

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

RANDOMISE CODES 1 AND 2 ONLY

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

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

RANDOMISE CODES 1 AND 2 ONLY

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

ASK ALL

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

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

<u>**SELECT WHETHER WILL ASK ABOUT MOST RECENT TAXI OR MOST RECENT RIDESHARE TRIP**</u>

IF 7 in Q1 AND 7 IN Q49 GO TO Q30

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

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

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

DO NOT SHOW Q13A.

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

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

SKIP Q13A IF 1-6 IN Q1 AND 1-6 IN Q49 AND GO TO <u>RANDOM NUMBER GENERATOR</u>

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

1, Taxi
2, Rideshare

IF 1 IN Q13A GO TO Q14

IF 2 IN Q13A GO TO Q14RS

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

**DO NOT DISPLAY Q13-SEL

MAKE SELECTION ON Q13SEL IF Q13A IS EMPTY

Q13_SEL. SELECTION MASK

1, taxi
2, rideshare

SHOW Q14 IF Q13_SEL=1 OR Q13A = 1.

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

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

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

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

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

IF 4 IN Q14 GO TO Q15

Q14A. BOARD - This was….

1, From my house
2, From somewhere else

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

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

IF 4-17 IN Q3M DISPLAY CODES 5-7

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

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

Q15A. (ALIGHTED - HOME) This was….

1, To my house
2, To somewhere else

IF NOT 1 IN Q3M SKIP TO Q16

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

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

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

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

SHOW Q17 FOR FEB WAVE ONLY

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

1, December
2, January
3, Another month

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

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

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

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

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

1, Work-related (including getting home from work)
2, Getting to or from appointments
3, Getting to or from the shops
4, Socialising or recreation (including getting back home)
6, Moving items from one place to another
5, Other (such as education related)

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

1, Quicker or more direct
2, Convenience (for example, I didn't have to worry about parking, I had luggage, it was raining and I didn't want to get wet, I was drinking)
3, Cheaper than alternatives
6, More reliable than alternatives
7, Makes different types of vehicle (like a van, ute or luxury car) available
4, I didn't have access to any other transport options
5, Another reason

BOOKING AND WAIT FOR TAXIS

Q22. HOW ORGANISED I got the taxi …

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

IF 1 IN Q22 GO TO 23A

IF 2 IN Q22 GO TO Q23B

IF 3 TO 6 IN Q22 GO TO Q24

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

IF 8 IN Q22 GO TO Q25

SHOW Q22A IF 7 AT Q22

Q22A. (APP ORGANISED) I used

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

GO TO Q24

SHOW Q23A IF 1 AT Q22

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

1, Less than 5 minutes
2, 5 to less than 10 minutes
3, 10 to less than 20 minutes
4, 20 to less than 40 minutes
5, More than 40 minutes

GO TO Q25

SHOW Q23B IF 2 AT Q22

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

1, Less than 5 minutes
2, 5 to less than 10 minutes
3, 10 to less than 20 minutes
4, 20 to less than 40 minutes
5, More than 40 minutes

GO TO Q25

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

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

IF 2 IN Q24 GO TO Q24B

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

1, Less than 5 minutes
2, 5 to less than 10 minutes
3, 10 to less than 20 minutes
4, 20 to less than 40 minutes
5, More than 40 minutes

IF 1-2 IN Q24A GO TO Q25

IF 3-5 IN Q24A GO TO Q24C

Q24B (BOOKED ARRIVAL TIME) The taxi arrived ..

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

IF 1 IN Q24B GO TO Q25

Q24C (LATE ARRIVAL) Which did you do?

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

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

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

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

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

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

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

Q27. HOW FARE PAID The fare was paid by ...

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

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

1, By me personally
2, Split between me and some else
3, By my own business
4, By my employer
5, By a client
6, By someone else not listed above

IF 3-6 IN Q28 GO TO Q30

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

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

NOT CATCHING TAXI – ASK ALL

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

IF 1-6 IN Q1 HIDE CODE 2

IF 7 IN Q1 HIDE CODE 3

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

IF 2 IN Q30 GO TO Q41

IF 3 IN Q30 GO TO Q40

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

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

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

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

SHOW Q33A IF 1 IN Q31

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

SELECT ONE

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

GO TO QUESTION 36

SHOW Q33B IF 2 IN Q31

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

MULTIPLE RESPONSE

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

IF WAVE 1 GO TO Q38

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

1, December
2, January
3, Another month

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

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

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

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

TAXI PROBLEMS

IF 7 IN Q1 GO TO Q41

Q40. PROBLEMS WITH TAXI USE In the past 12 months

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

IF 2 IN Q40 GO TO PREQ49

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

MULTIPLE RESPONSE

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

IF Q40A = 8, SHOW Q40B

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

OPEN

SHOW Q41 IF 2 AT Q30

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

MULTIPLE RESPONSE

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

<u>**RIDE SHARE USE**</u>

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

PREQ49 Now for some questions about your views on using ride share services (for example, UberX or GoCar or GoBuggy).

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

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

SHOW Q49C IF Q49B = 1

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

MULTIPLE RESPONSE

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

SHOW Q49D IF Q49B = 2

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

MULTIPLE RESPONSE

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

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

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

IF 7 IN Q49 GO TO Q30RS

IF 1-6 in Q49 CONTINUE WITH Q49F

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

RANDOMISE DISPLAY

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

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

RANDOMISE

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

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

RANDOMISE IN BLOCKS OF 2

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

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

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

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

RANDOMISE 1 AND 2

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

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

RANDOMISE 1 AND 2

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

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

RANDOMISE 1 AND 2

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

SHOW Q49M FOR CODES 1 OR 2 AT Q4DEM

Q49M (WORK RIDESHARE POLICY) My workplace ….

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

SHOW Q49N IF 1 AT Q49M

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

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

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

IF 2 IN Q13A OR 2 IN Q13_SEL SHOW Q14RS

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

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

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

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

IF 4 IN Q14RS GO TO Q15RS

Q14RSA. BOARD - This was….

1, From my house
2, From somewhere else

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

IF 1 OR 2 IN Q3M DISPLAY CODES 1-4

IF 3 IN Q3M DISPLAY CODES 1-3

IF 4-17 IN Q3M DISPLAY CODES 5-7

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

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

Q15RSA. (ALIGHTED - HOME) This was….

1. To my house
2. To somewhere else

IF NOT 1 IN Q3M SKIP TO Q16RS

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

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

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

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

SHOW Q17RS FOR FEB WAVE ONLY

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

1. December
2. January
3. Another month

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

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

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

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

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

1. Work-related (including getting home from work)
2. Getting to or from appointments
3. Getting to or from the shops
4. Socialising or recreation (including getting back home)
5. Moving items from one place to another
6. Other (such as education related)

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

1. Quicker or more direct
2. Convenience (for example, I didn't have to worry about parking, I had luggage, it was raining and I didn't want to get wet, I was drinking)
3. Cheaper than alternatives
4. More reliable than alternatives
5. Makes different types of vehicle (like a van, ute or luxury car) available
6. I didn't have access to any other transport options
7. Another reason

Q22RSB APP USED TO BOOK RIDESHARE I used

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

GO TO Q24RS

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

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

IF 2 IN Q24RS GO TO Q24RSB

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

1. Less than 5 minutes
2. 5 to less than 10 minutes
3. 10 to less than 20 minutes
4. 20 to less than 40 minutes
5. More than 40 minutes

IF 1-2 IN Q24RSA GO TO Q25RS

IF 3-5 IN Q24RSA GO TO Q24RSC

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

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

IF 1 IN Q24RSB GO TO Q25RS

Q24RSC (LATE ARRIVAL) Which did you do?

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

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

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

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

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

Q26RS. (FARE AMOUNT) The fare, including any service fee for electronic payment, was …

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

Q28RS. WHO COVERED COST The cost of the trip was covered …

1. By me personally
2. Split between me and some else
3. By my own business
4. By my employer
5. By a client
6. By someone else not listed above

IF 3-6 IN Q28RS GO TO Q30RS

Q29RS. FARE SATISFACTION For the amount I paid for this trip, I was:

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

NOT GETTING RIDE SHARE

Q30RS. CONSIDERED USING A RIDE SHARE SERVICE BUT DID NOT In the last 6 months …

IF 1-6 IN Q49 HIDE CODE 2

IF 7 IN Q49 HIDE CODE 3

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

IF 2 IN Q30RS GO TO Q41RS

IF 3 IN Q30RS GO TO Q40RS

Q31RS. The last time that I thought about using a ride share service but in the end did not

1, I tried to take a ride share service but I couldn’t get one
2, I thought about taking a ride share service but then decided to do something different

Q32RS. ALTERNATIVE USED The last time I tried to catch a ride share service or thought about catching a ride share service and in the end did not, I …

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

SHOW Q33RSA IF 1 AT Q31RS

Q33RSA. REASONS DID NOT TAKE A RIDE SHARE SERVICE WHEN I TRIED TO The last time I did not take a ride share service although I tried to, I did something else because …

SELECT ONE

1, The wait was too long and I gave up
2, I booked a ride share service but it didn't turn up
3, There were no cars available in my area
4, It was a peak or surge pricing period and the quoted cost was too high
5, For some other reason

GO TO Q36RS

SHOW Q33RSB IF 2 AT Q31RS

Q33RSB. REASONS DID NOT TAKE A RIDE SHARE SERVICE WHEN THOUGHT ABOUT IT The last time I did not take a ride share service although I thought about it, I did something else because …

MULTIPLE RESPONSE

1, I thought it would be too expensive
2, I was worried I might have to wait too long for one to come or that a ride share service might not turn up at all
3, A bus arrived before the ride share car
4, A taxi came before the ride share car arrived and I decided to take the taxi
5, For some other reason

SHOW Q36RS FOR FEB WAVE ONLY

Q36RS. MONTH The last time I tried to catch a ride share service or thought about catching a ride share service but in the end did not, was in …

1, December
2, January
3, Another month

Q38RS. DAY The last time I tried to use a ride share service or thought about using a ride share service but in the end did not, was on …

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

Q39RS. TIME The last time I tried to use a ride share service or thought about using a ride share service but in the end did not, was …

In the morning (before midday)

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

RIDESHARE PROBLEMS

IF 7 IN Q49 GO TO Q41RS

Q40RS. PROBLEMS WITH RIDE SHARE SERVICE USE In the past 12 months

1, I have personally experienced one or more problems either during a ride share service journey or when I was trying to get one
2, I have not experienced a problem during a ride share service journey or when I was trying to get one

If 2 IN Q40RS, GO TO Q42

Q40RSA. IDENTIFY RIDE SHARE SERVICE PROBLEMS The problems I have experienced in the last 12 months with a ride share service include:

MULTIPLE RESPONSE

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

SHOW Q40RSB IF 8 IN Q40RSA

Q40RSB When I said I had a problem with something else, it was:

OPEN

SHOW Q41RS IF 2 AT Q30RS

Q41RS. REASON HAVEN'T CONSIDERED A RIDE SHARE SERVICE I have not considered taking a ride share service because…

MULTIPLE RESPONSE

1, Driving myself is more convenient
2, They are too expensive
3, The waiting times are too long
4, I am worried the ride share car won't show up after I book one
6, The ride share service might not be safe
7, I don't understand how they work
8, I'm unsure how to get one
9, I did not want to download and install the app for getting a ride share car
10, Against company policy
11, I think the services are exploiting their drivers
12, I did not know that services like this are available
13, I object to the peak or surge pricing policy
5, For some other reason

CAR SHARE USE

****SHOW PREQ48 FOR ALL RESPONDENTS**

PREQ48 Now for some questions about your views on using car share services (for example, driving myself in a car from GoGet, GreenShareCar, Car Next Door or Hertz 24/7).

****DISPLAY PREQ49 ON A SEPARATE PAGE**

Q48B. (USAGE CHANGE) Compared to the previous 12 months, in the last 12 months

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

SHOW Q48C IF 1 IN Q48B

Q48C (USED CAR SHARE SERVICES MORE) Now some questions about your views on using car share services.
I used car share services more frequently because…

MULTIPLE RESPONSE

1, I find them less expensive than before
2, I have more disposable income
3, I'm going out more
4, Because I know it will be available at the time I have booked it
5, I have less access to alternatives such as a car, or public transport when I need it
6, Because the service for booking car share services is better than for booking taxis
7, Because it has become easier to book a car share service with an app
8, Because I know in advance what it will cost
11, Because they were not available previously or I did not know about them before then
10, For another reason

GO TO QUESTION 48E

Q48D. USE CAR SHARE SERVICES LESS I used car share services less frequently because (can choose more than one)

1, They have become more expensive than they were
2, I have less disposable income
3, I'm going out less
4, Because I find the available cars are too far away, or I can't rely on the car being there when I have booked it
5, I have better access to a car
6, Public transport has improved when I need it
12, I use ride share (such as UberX) instead
13, I use taxis instead
11, I have better access to other transport alternatives
7, Because the booking apps have become worse or are too difficult
10, For another reason

Q48E. FUTURE CAR SHARE USE In the next 12 months, the thing that is most likely to get me to use car share more regularly is:

SINGLE RESPONSE

6, If car share becomes available in [Q3M]
1, If prices get cheaper
3, If booking services improve
7, If they were located closer to me
5, None of these improvements would make me use car share more regularly

IF 7 IN Q47 GO TO Q42

IF 1-6 in Q47 CONTINUE WITH Q48F

Q48F. (CAR SHARE VALUE FOR MONEY) Overall, I think:

RANDOMISE

1, Car share prices are good value for money
2, Car share prices are not good value for money

Q48G. (ABLE TO GET CAR SHARE FOR LAST JOURNEY) When I last tried to get a car share I was

1, Able to get one when I wanted
2, Not able to get one when I wanted

Q48H. (DISTANCE) My most recent car share trip in [Q3M] was…

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

Q48I. (PURPOSE) My main purpose in taking my most recent car share trip in [Q3M] was …

1, Work-related (including getting home from work)
2, Getting to or from appointments
3, Getting to or from the shops
4, Socialising or recreation (including getting back home)
6, Moving items from one place to another
5, Other (such as education related)

Q48J. (REASON FOR CAR SHARE USE) The main reason I took a car share for this journey instead of other transport options was …

1, Quicker or more direct
2, Convenience (for example, I didn't have to worry about parking, I had luggage, it was raining and I didn't want to get wet)
3, Cheaper than alternatives
6, More reliable than alternatives
7, Makes different types of vehicle (like a van, ute or luxury car) available
4, I didn't have access to any other transport options
5, Another reason

Q48K. (COST OF THE CAR SHARE USE) The cost of this car share use, including any service fee for electronic payment, was …

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

Q48L (FARE SATISFACTION – CAR SHARE) For the amount I paid for this trip, I was:

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

HIRE CARS

****SHOW PREQ42 FOR ALL REPSONDENTS**

PREQ42. Now for some questions on hire cars, courtesy transport and community transport

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

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

IF 7 IN Q42 GO TO Q51

Q43. REASONS USED A HIRE CAR I used the hire car with a driver instead of a taxi or rideshare because ....

MULTIPLE RESPONSE

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

Q51. COURTESY TRANSPORT In the last six months I have used courtesy transport provided by a pub, club or other venue

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

SHOW Q52 IF 1-6 AT Q51

Q52. REASONS USED COURTESY TRANSPORT I used courtesy transport instead of a taxi or rideshare because ....

MULTIPLE RESPONSE

1, It is more reliable
2, It is more comfortable
3, It is cheaper
4, Other reasons

** IN February 2017 Q52A ASKED IF 4 IN Q52

Q52A. My other reason is ...

1, It is free – no charge made for the service
2, Something else

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

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

SHOW Q54 IF 1-6 AT Q53

Q54. REASONS USED COMMUNITY TRANSPORT I used community transport instead of a taxi or rideshare because ....

MULTIPLE RESPONSE

1, It is more reliable
2, It is more comfortable
3, It is cheaper
4, Other reasons

** IN February 2017 Q54A ASKED IF 4 IN Q54

Q54A. My other reason is ...

1, It is free – no charge made for the service
2, Something else

Q44. NUMBER OF VEHICLES The number of registered vehicles, counting both private and company owned, used by my household is ...

1, None
2, 1
3, 2
4, 3 or more

Q45. USUAL TRAVEL I usually get around by ...

MULTIPLE RESPONSE

1, Driving myself using a company or private vehicle
2, Driving myself using a GoGet car or other car sharing service
3, Getting a lift
4, Public transport
5, Cycling or walking
6, Taking a taxi
7, Using rideshare (such as UberX)
8, Using community transport
9, Using courtesy transport provided by a pub, club or other venue

OTHER DEMOGRAPHICS

Q5DEM HOUSEHOLD INCOME Would you mind telling us your approximate household annual income from all sources before tax, bearing in mind that this information will remain strictly confidential and that Taverner Research and its client have no way of identifying you? Just click on the answer below you believe comes closest, even if you are not completely sure.

1, Under $20,000
2, $20,000 to under $30,000
3, $30,000 to under $40,000
4, $40,000 to under $50,000
5, $50,000 to under $60,000
6, $60,000 to under $80,000
7, $80,000 to under $100,000
8, $100,000 to under $120,000
9, $120,000 to under $180,000
10, $180,000 or more
11, Can't say
12, Don't want to say

Q6DEM DISABLITY I ...

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

IF CODE 2 AT Q6DEM GO TO Q99END

Q7DEM WHEELCHAIR I can ...

1, Catch any type of taxi or rideshare
2, Only use a wheelchair accessible taxi or rideshare

Q8DEM TAXI SUBSIDY I get payment assistance for taxis from the

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

Q99END TERMINATE SURVEY

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

Please click on SUBMIT below to submit your survey answers and ensure you receive your incentive.

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