Independent Pricing and Regulatory Tribunal of NSW

2022 Point-to-Point Transport Survey Report

ORIMA Contact: David Bruce

Phone number: 02 6109 6300

Our ref: 5297

2 June 2022

Melbourne Canberra Sydney Brisbane
www.orima.com

Contents

Appendices

This research was conducted in accordance with our ISO20252 and ISO27001 accreditation, and with applicable Australian privacy legislation.

1. Executive Summary

Source of data: The 2022 IPART Point-to-Point Transport Survey is the fifth annual survey using a revised and updated questionnaire. Three independent samples are used, one for Sydney (n=2,070 respondents), one for 'other urban' areas (n=541) and one for the rest of NSW (n=412). The current survey was delayed from late 2021 to March 2022 due to the impact of COVID-19 restrictions. The questionnaire captures equivalent data for taxis, rideshare and limousines / other hire vehicles. The post-2018 samples are structured and weighted to match as closely as possible the 2017 sample in order to maximise comparability across waves.

Overview of key results

As was the case in the 2020, the 2022 NSW point-to-point transport survey is dominated by the confluence of the relative life-stage of rideshare services entering the marketplaces, and the impact of COVID-19.

Since the new survey methodology was introduced in 2018, the survey has tracked the rapid growth of rideshare in all locations – but the service has emerged more slowly in other urban areas and the rest of NSW compared to Sydney. Rideshare use exceeded taxi use in Sydney in 2019, and then in other urban areas in 2020. However, even then the growth curve of rideshare was flattening as the services became more established and mature in these larger markets. The impact of COVID-19 was a reduction in total *volumes* of point-to-point transport use, but in 2020 it seemingly had less impact on the relative *patterns* of use. The impact of COVID in 2020 on use of taxis was much greater than the impact on use of rideshare services.

In 2022 the use of point-to-point transport bounced back a little, though remained subdued compared to pre-COVID use. Reported use of taxis in all locations was 14% lower than in 2019, while rideshare use was 4-5% lower in Sydney and other urban areas. 2022 saw a continuation of trends seen in 2020 about how point-to-point transport services were obtained, with a **decline in rank and hail, and an increase in ASAP bookings**. For taxis, the slow general movement towards internet and app bookings continues to be seen during COVID.

Overall, point-to-point transport collectively continues to seemingly meet the majority of needs of NSW residents. Overall satisfaction with last trips remains at 79-90% across all services and locations. Satisfaction with waiting times is generally over 80%, and satisfaction with fares is generally over 60%. Just 8-12% of all respondents in any location were actively dissatisfied with the taxi services available in their area, and 5-10% were actively dissatisfied with the rideshare services available to them. 11-14% of respondents across locations had had at least one failed attempt to get a taxi in the last 6 months, while 17-19% of respondents had at least one failed attempt to get a rideshare. 75-84% of respondents managed to get a taxi the very last time they tried to, and 86-90% managed to get a rideshare the last time they tried to. When users are unable to get a taxi or a rideshare, they tend to use the other service, public transport, or self-transport – and only on less than 1-in-5 times does the trip not go ahead at all (slightly higher than pre-COVID).

After taxis were more significantly impacted than rideshare in 2020, **the 2022 results saw many perceptions of rideshare fall back slightly, while perceptions and use of taxis steadied**. The overall pattern of results suggests that **rideshare is now a fully mature service in Sydney, and close to that in other urban areas** – but in the rest of NSW remains an emerging service.

Rideshare retains an advantage over taxis in many perceptual and usage aspects, including perceptions of waiting times and practicality, and in particular in terms of satisfaction with fares and value. Last trip data suggests that rideshare fares *are* somewhat lower than taxi fares for equivalent length trips, and that waiting times for comparable ASAP booking *are* slightly shorter.

However, **in the 2022 survey many rideshare indicators fell slightly, including these major points of difference**. The measures where slight reductions were seen in the 2022 rideshare results included: experience of failed trips, users experiencing some type of problem, waiting times, satisfaction with fares, satisfaction with the service available, and a range of attributes including value. The proportion of rideshare users who don't compare fares because they are happy with the fare estimate given has also been declining.

While **perceptions of taxis have not changed greatly, where they did change from 2020 to 2022 they were generally in positive directions**, including in terms of value for money and satisfaction with fares.

2. Introduction

A. Background

The Independent Pricing and Regulatory Tribunal (IPART) provides independent regulatory decisions to balance the rights and needs of NSW citizens, taxpayers and service providers. Taxi services have long been among the services IPART contributes to the regulatory environment for. Recent years have seen dramatic changes to the point-to-point transport services environment in which taxis operate, in particular the rapid emergence of rideshare and other hire vehicle categories.

Since 2012 IPART has conducted regular surveys of NSW residents on their experiences, as well as their reasons for using point-to-point transport options. The 2017 survey was timed to run just prior to changes to the regulation of taxis and other point-to-point transport services that came into effect on 1 November 2017. With the changes in landscape and regulations, the 2017 survey took the opportunity to substantially revise the questionnaire to better reflect the current and anticipated short-to-medium term context, in particular adopting an approach of having parallel questions for taxis, rideshare and 'limousines and other hire vehicles' to maximise the consistency and comparability of data across these different services. Throughout the report, the results from the different transport services are now reported in parallel.

Where possible, questions in the new survey retained consistency with previous questions to allow some ongoing tracking. However, 2017 was seen as the opportune time to update the questionnaire to best suit the current situation, and in most cases future relevance was given priority over continuity. To aid calibration of the new method to the historical data, a small concurrent survey utilising the previous method was also conducted. See appendix F for details

After the substantial changes in 2017, the 2018 survey placed the primary emphasis on methodological consistency to maximise comparability and sensitivity to any changes since the previous year. A virtually identical questionnaire and source of data were used in 2018, and then no substantive changes were made at all from 2018-2022. This allows the focus of the reporting to be on updating results and identifying any changes over time.

While the 2020 survey kept an identical method and questionnaire, like all things at present the survey needed to be contextualised to the COVID-19 pandemic. Additional items were added to a number of existing survey questions in 2020 to pick up the extent to which COVID was a new factor in the use of point-to-point transport, and a number of additional explicit COVID questions were included.

Due to the impact of COVID-19 lockdowns in late 2021, the usual October-November timing of the current survey was delayed until March 2022. The survey content and methodology used were identical to 2020 in all ways other than the timing, and the inclusion of one new question about awareness of proposed regulatory changes.

B. Research objectives

The purpose of the survey is to collect data on NSW residents' experiences with and perceptions of point-to-point transport service options.

Specific objectives are to measure:

- Awareness of transport options available in their location
- Usage of transport services, including change in usage in the last 12 months
  - Impact of use of hire vehicles on use of taxis
- Satisfaction with the available transport services
- Incidence of problems trying to use transport services, and alternatives used as a result
- Methods used to obtain point-to-point transport services
- Perceived value for money
  - Possible impact of minimum rank and hail taxi fares
- Perceived reasonableness of waiting times
- Workplace policies towards point-to-point transport options
- Detailed information about the last trip undertaken
- Perceptions of the strengths and weaknesses of different service options
- Preferences for different service options
- Awareness of the impending regulatory changes.

An additional objective in 2020 and 2022 was to understand the effect of COVID on use of point-to-point transport – both overall, and relatively across the different types of transport choice available.

C. Methodology

The 2022 methodology was identical to those used since 2017. The 2022 survey was administered online to a total of 3,023 NSW residents between 8 March and 21 March 2022 (including a brief pause to examine and confirm pilot data). The survey had originally been planned for the usual October-November timing in 2021, but was delayed until March 2022 due to the impact of COVID-19 restrictions in later 2021.

Three independent samples were obtained:

1. Sydney n=2,070
2. Other Urban (Newcastle, Wollongong, Gosford and Wyong) n=541
3. Rest of NSW n=412

As in the past four survey waves, respondents were all members of the ORU online research panel. Panel members are recruited via a combination of online and offline methods to maximise representativeness, and all incentives provided for participation are sent to physical addresses to ensure geographic correctness.

Interlocking age and gender quotas were applied at the time of data collection to match ABS population proportions. In 2017 all age by gender cells were within 1% of the target quota with the exception of 16-29 year old males in the Other Urban sample (who were slightly under sampled), and no weighting was applied to the data for analysis due to its close alignment with the target profiles. The same quota system has been applied in future surveys, but slight variations in exact respondent numbers are always observed. To completely maximise comparability to the 2017 benchmarks, data in later surveys is weighted to exactly match the 2017 sample proportions.

The base questionnaire was developed 2017 by ORIMA Research in collaboration with IPART. This drew on the previous questionnaire where possible, while updating the content and format to better suit the operational balance of taxis and hire vehicles in NSW. The 2018 questionnaire updated codeframes in several questions to reflect answers in 2017, and collect additional detail for some questions (eg: pick up and set down locations). The 2019-20 surveys only updated changed provider names, but in all substantive aspects remain identical to 2018.

The 2022 survey again updated rideshare and carshare provider names to suit the current marketplace. To respond to the COVID context, additional COVID response options were added to some questions in 2020 (eg: reasons for changing use of transport options), and several other additional new COVID-specific questions were included to measure explicit impacts of COVID on customer choices. These questions were retained for 2022.

A copy of the questionnaire can be seen in Appendix A.

The questionnaire takes an average of 12 minutes for respondents to complete.

Demographic details of the sample can be seen in Appendix B.

Note that throughout the report where sample sizes drop below a minimum threshold of n=30 for any subsample, these results are shown in grey or semi-transparent form. These results should be interpreted with caution as being indicative only.

Comparisons to data prior to the 2017 benchmarks should be made with caution due to the substantial change in methodology.

3. Main Survey Findings

Definitions

This report refers to three geographic regions and three types of point-to-point transport services. Each of these has a distinct colour associated with it, used consistently in tables and charts to identify which area and service results relate to more easily.

Geographic areas

	Sydney	Metropolitan Sydney
	Other Urban	Newcastle, Wollongong, Gosford, Wyong
	Rest of NSW	All other areas of NSW outside Sydney and the other urban centres

Point-to-point transport services

	Taxis	A vehicle clearly marked as a taxi and with a TAXI sign on its roof – refers to rank & hail and booked taxis unless otherwise specified.
	Hire Vehicles	Hire vehicle services provide a vehicle with a driver to transport you from one point to another for the payment of a fare
	Rideshare	Rideshare services like Uber, Shebah, Ola or Didi
	Limousines or other hire vehicles	Other hire car services with a driver

Note: Throughout the main body of the report there are tracking charts showing changes in key measures across multiple surveys. Many of these show just the directly comparable 2017-2022 data, but where suitably comparable data from earlier surveys exists this is also shown. Full data tables for the tracking charts can be seen in Appendix E.

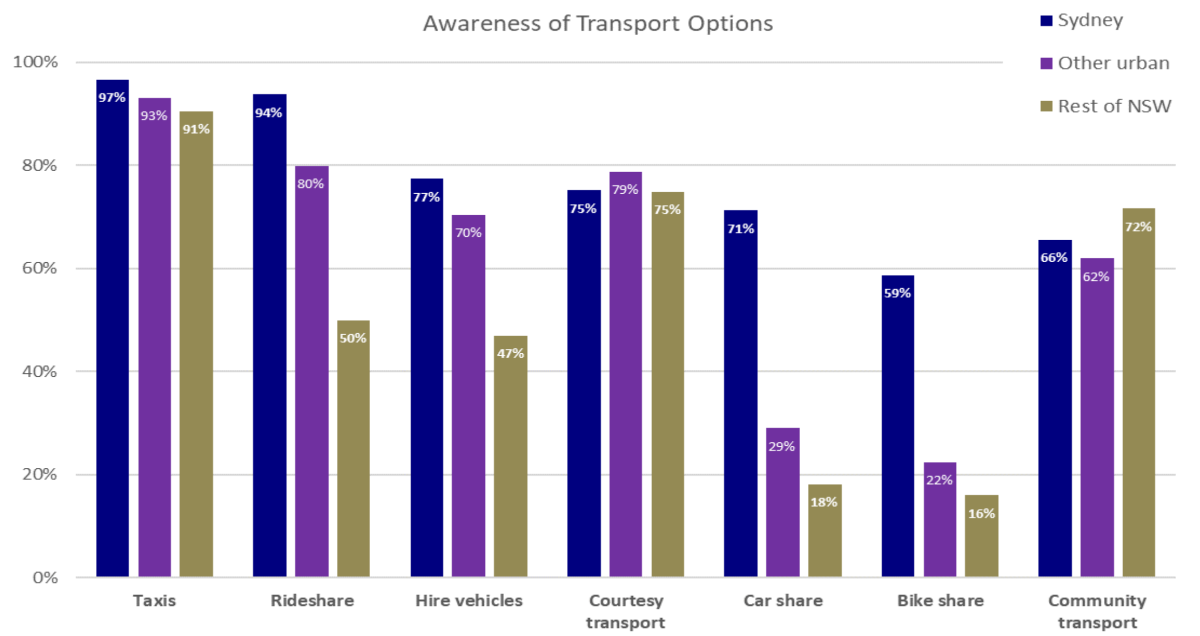
A. Local Transport Services

Awareness and Use

More than 90% of respondents in all three locations were aware of taxis operating in their area. Within Sydney awareness of rideshare services operating were effectively at the same near-ubiquitous level as taxis, but considerably fewer respondents from other urban areas and from the rest of NSW were aware of rideshare services in their location.

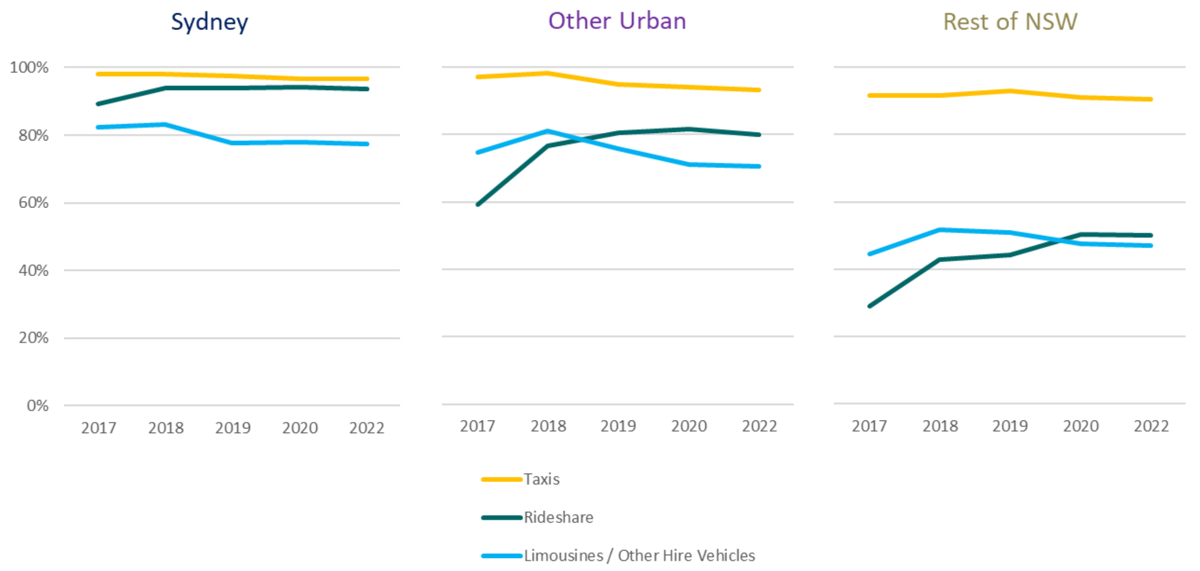
Reported awareness of taxis, rideshare, and limousines and other hire vehicles were all steady compared to the last survey in late 2020. For rideshare, this reflects a plateau in previously rising awareness of service availability outside of Sydney.

Figure 1: Awareness of point-to-point transport services in their location Q5/8/11



Base = all respondents [Sydney n=2,070; Other Urban n=541; Rest of NSW n=412]

Figure 2: Change in awareness of point-to-point transport services in their location Q5/8/11



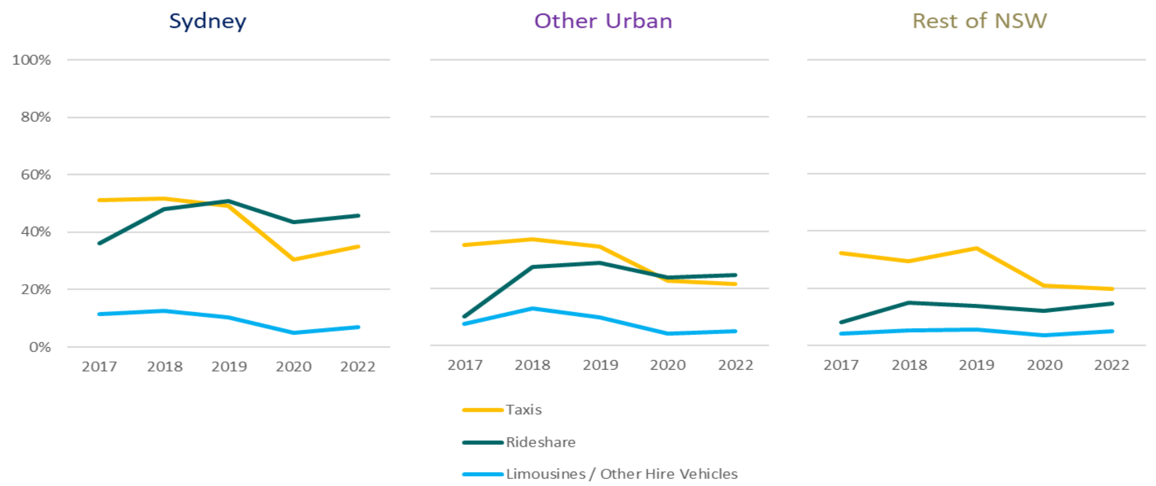
The five waves of the current survey have shown a significant change in relative **usage** of taxis and rideshare. In 2017 taxi usage was much higher than rideshare in all locations. Across 2018 and 2019 rideshare usage increased, especially in Sydney and other urban areas, while taxi usage declined a little. In 2020 the impact of COVID-19 was seen much more strongly in lower use of taxis than in use of rideshare, which declined to a much smaller extent.

In 2020 reported taxi usage in the last 6 months declined 18% in Sydney and 12-13% in other locations. Rideshare usage dropped only 2-7%. Use of taxis in Sydney in the last 6 months was 35% in the 2022 survey, considerably lower than the 46% who reported using Rideshare services. In other urban areas the proportions were more even, at 25% for rideshare and 21% for taxis. In the rest of NSW, even though awareness of rideshare services operating is lower, use of taxis has declined from 32% to 20% since the 2017 survey, while use of rideshare has increased from 8% to 15% in the same time.

Figure 3: Usage of point-to-point transport services in the last 6 months among all respondents and among those aware of the service in their area Q6/9

Use in the last 6 months		Taxis			Rideshare services			Limousines or other hire vehicles		
		Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Used in the last 6 months (Base = <u>all</u> respondents)	**2022**	**35%**	**21%**	**20%**	**46%**	**25%**	**15%**	**7%**	**5%**	**5%**
	Sample size	*2,070*	*541*	*412*	*2,070*	*541*	*412*	*2,070*	*541*	*412*
	2020	31%	23%	21%	44%	24%	12%	5%	4%	3%
	Sample size	*2,026*	*508*	*407*	*2,026*	*508*	*407*	*2,026*	*508*	*407*
	2019	49%	35%	34%	51%	29%	14%	10%	10%	6%
	Sample size	*2,095*	*522*	*446*	*2,095*	*522*	*446*	*2,095*	*522*	*446*
	2018	52%	37%	29%	48%	28%	15%	13%	13%	5%
	Sample size	*2,147*	*533*	*478*	*2,147*	*533*	*478*	*2,147*	*533*	*478*
	2017	51%	35%	32%	36%	10%	8%	11%	8%	4%
	Sample size	*2,048*	*501*	*453*	*2,048*	*501*	*453*	*2,048*	*501*	*453*
Used in the last 6 months (Base = **aware of service**)	**2022**	**36%**	**23%**	**22%**	**49%**	**31%**	**29%**	**9%**	**7%**	**10%**
	Sample size	*2,000*	*504*	*373*	*1,941*	*432*	*206*	*1,601*	*381*	*194*
	2020	**32%**	**24%**	**23%**	**46%**	**29%**	**24%**	**7%**	**6%**	**7%**
	Sample size	*1,960*	*477*	*371*	*1,908*	*415*	*204*	*1,581*	*361*	*193*
	2019	51%	36%	37%	54%	36%	31%	13%	13%	11%
	Sample size	*2,040*	*497*	*415*	*1,968*	*420*	*197*	*1,626*	*396*	*227*
	2018	53%	38%	32%	51%	36%	35%	15%	16%	10%
	Sample size	*2,104*	*523*	*438*	*2,015*	*409*	*205*	*1,784*	*432*	*247*
	2017	52%	36%	35%	41%	17%	27%	14%	10%	9%
	Sample size	*2,009*	*487*	*415*	*1,825*	*297*	*131*	*1,686*	*374*	*202*

Figure 4: Change in usage of point-to-point transport services in the last 6 months among all respondents Q6/9

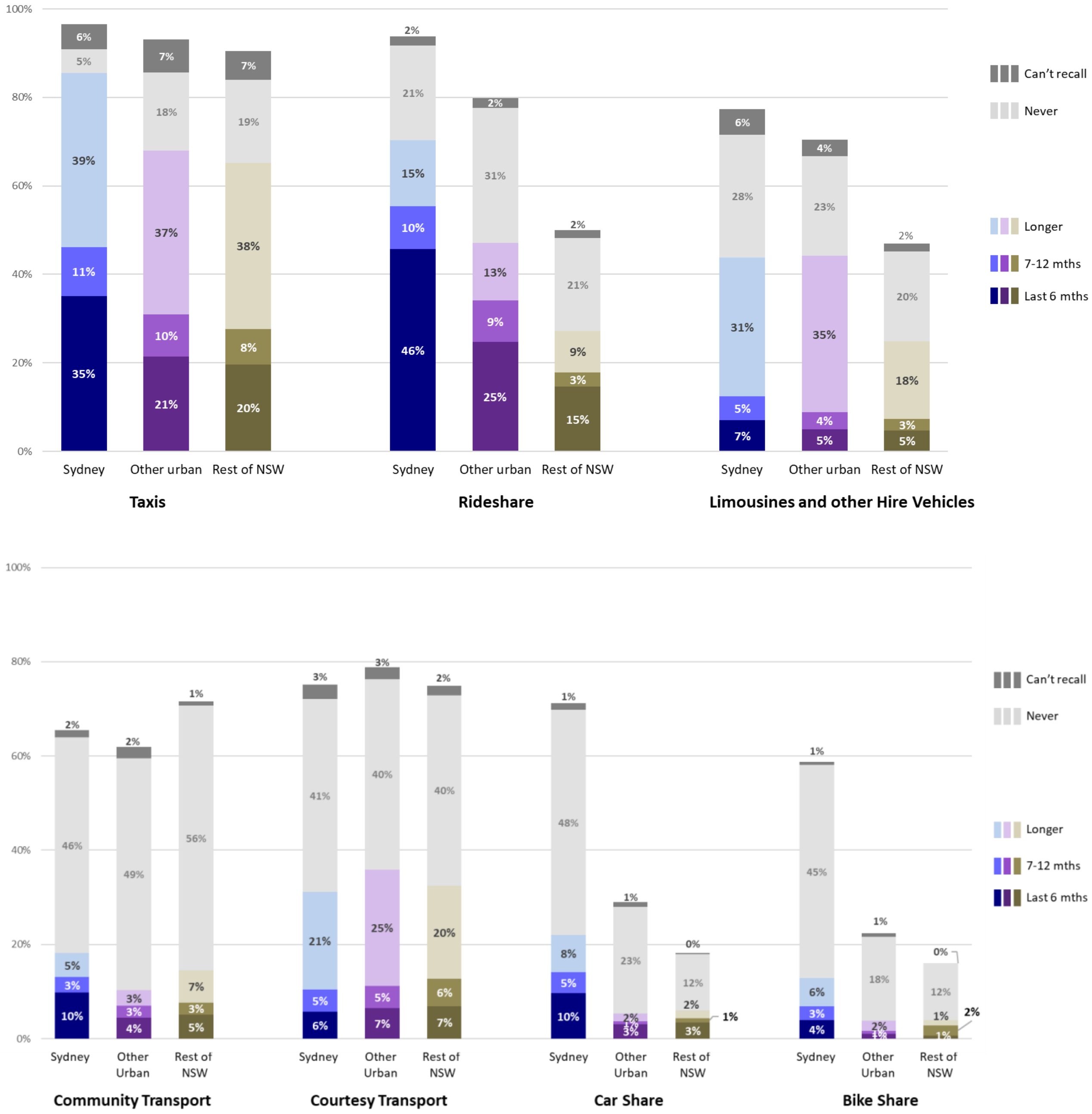


The more detailed breakdown of usage also shows the decline in frequency of using taxis. 46% of Sydney respondents had used a taxi in the last 12 months, compared to 51% in 2020 and 63% in 2019. By comparison 56% reported using a rideshare in the last 12 months, a figure which has been effectively steady since 2019. Similar patterns are seen in other urban areas and the rest of NSW.

The proportion of people who were aware of taxi and rideshare services being available but who have never used them is effectively unchanged since the 2020 survey.

Reported use of limousines and other hire vehicles is also comparable to 2020.

Figure 5: Breakdown of usage of point-to-point transport services Q6/9/12



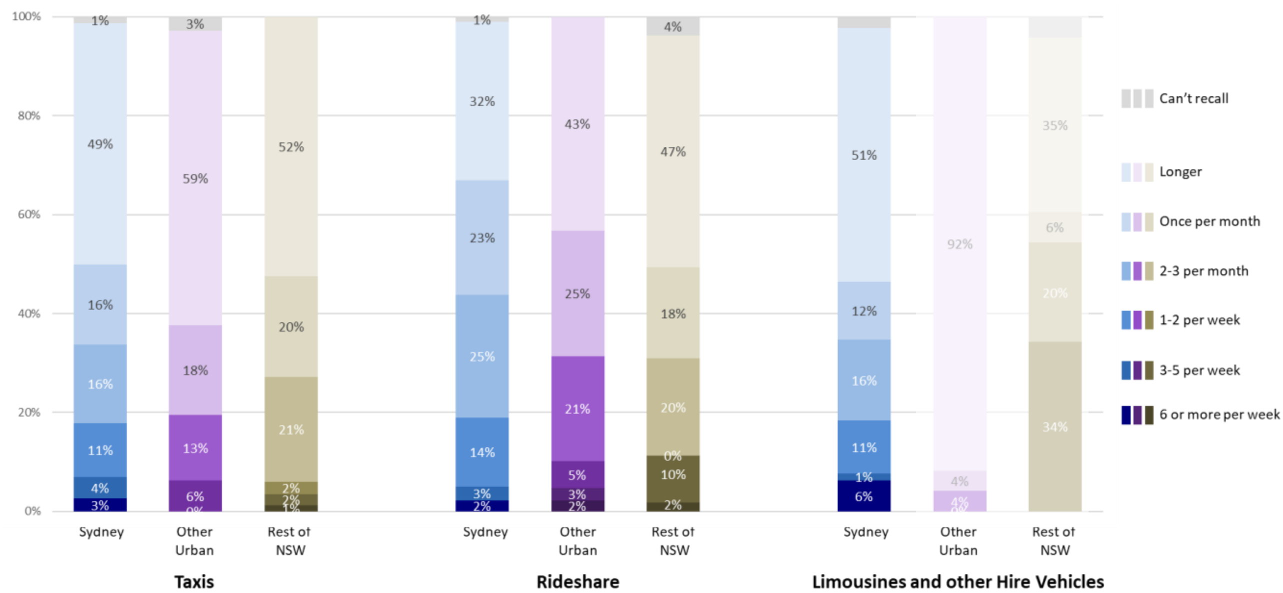
Base = all respondents [Sydney n=2,070; Other Urban n=541; Rest of NSW n=412]

Frequency of Use

The chart and table below show the breakdown only of those respondents who had used taxis or hire vehicles in the last 6 months.

It suggests that in all areas, people who use rideshare services at all continue to do so somewhat more frequently than do those who use taxis or limousines and other hire vehicles. This is a pattern which has been consistently seen across each year of the survey, though the extent to which this is observed on a weekly usage basis is somewhat less in 2022 than in 2020.

Figure 6: Frequency of using point-to-point transport services among service users Q13
Base = used in the last 6 months



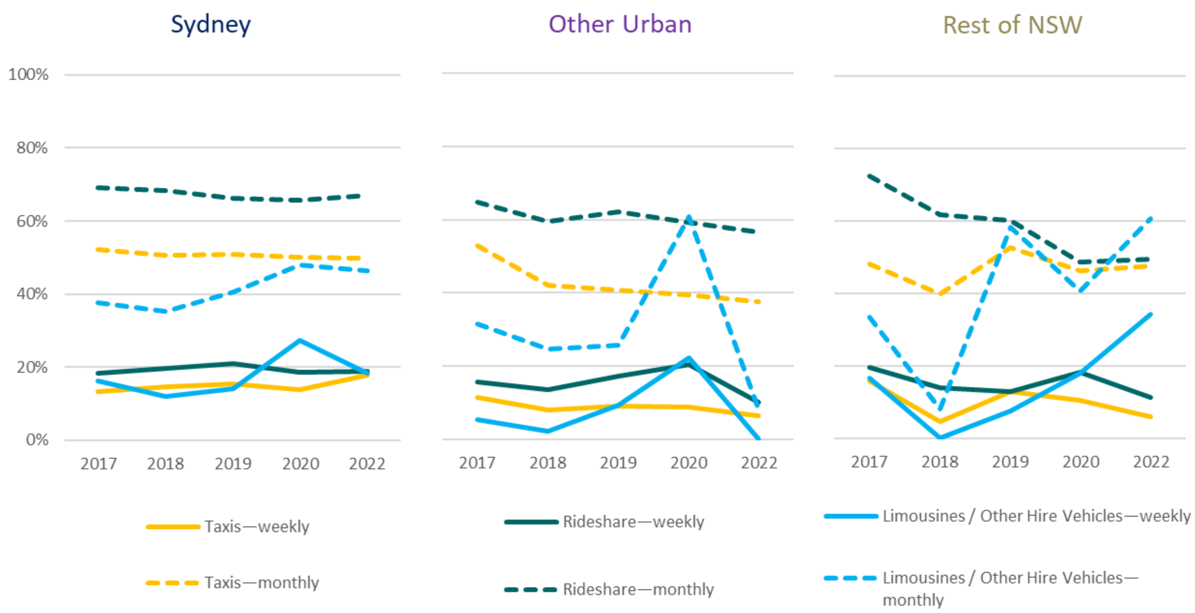
Base = Used service in the last 6 months [See sample sizes in table]

Frequency of use in the last 6 months	Taxis			Rideshare services			Limousines or other hire vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Proportion used in last 6 months	**35%**	**21%**	**20%**	**46%**	**25%**	**15%**	**7%**	**5%**	**5%**
Sample size (base = used in last 6 months)	*709*	*109*	*89*	*882*	*118*	*49*	*140*	*28*	*17*
6 or more times per week	3%	0%	1%	2%	2%	2%	6%	0%	0%
3-5 times per week	4%	0%	2%	3%	3%	10%	1%	0%	0%
1-2 times per week	11%	6%	2%	14%	5%	0%	11%	0%	34%
At least weekly	**18%**	**6%**	**6%**	**19%**	**10%**	**11%**	**18%**	**0%**	**34%**
2-3 times per month	16%	13%	21%	25%	21%	20%	16%	4%	20%
Once every month	16%	18%	20%	23%	25%	18%	12%	4%	6%
At least monthly	**50%**	**38%**	**48%**	**67%**	**57%**	**49%**	**46%**	**8%**	**61%**
Less often	49%	59%	52%	32%	43%	47%	51%	92%	35%
Can't recall	1%	3%	0%	1%	0%	4%	2%	0%	4%

Tracking the frequency of use since 2017 shows that the tendency for greater proportions of rideshare users to be active on a weekly or monthly basis has been consistent across this timeframe. The Sydney chart shows that users of taxis and rideshare were about equally likely to use them weekly in early 2022, whereas in all previous surveys users of rideshare reported slightly higher levels of weekly use.

Although sample sizes are small, the tracking charts suggest that users of limousines and other hire vehicles may have made more frequent use of these services in 2020 – however this seems to have reverted to more usual levels in 2022.

Figure 7: Change in frequency of using point-to-point transport services among service users Q13
Base = used in the last 6 months



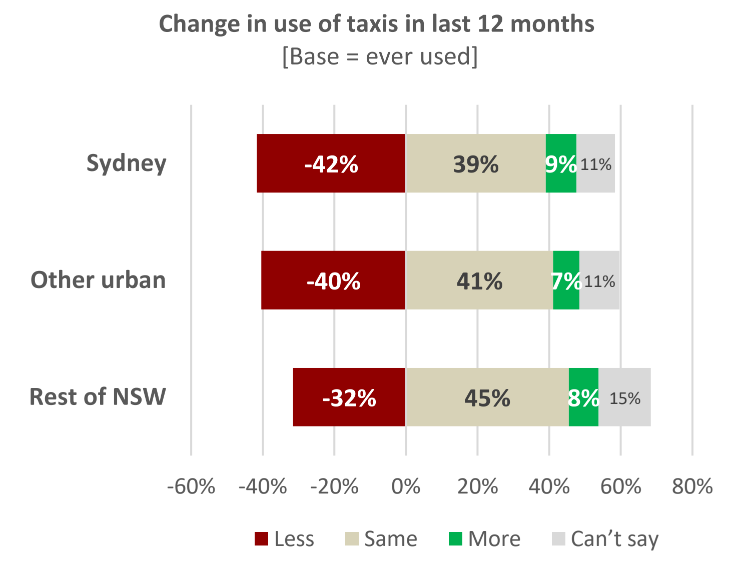
Note: Small sample sizes apply to the use of limousines and other hire vehicles (especially in the Rest of NSW sample), which largely accounts for the high degree of variability seen in that track.

Changes in Usage

Compared to the previous 12 months

Across the 2017-18-19 surveys there was a trend for people who had ever used taxis and limousines or other hire vehicles to report a decrease in their use of these services; while people who had ever used rideshare were likely to report their use was increasing. The 2019 survey suggested that the growth of rideshare was slowing in that 12-month period. The 2020 survey was marked by a dramatic reduction in the use of all point-to-point transport options compared to the previous year. In 2022 very similar patterns were seen to 2020, with users of all point-to-point transport types feeling that their usage continued to decline. Unsurprisingly, the reasons given for using transport less are a combination of direct COVID-related reasons, and going out less / less need.

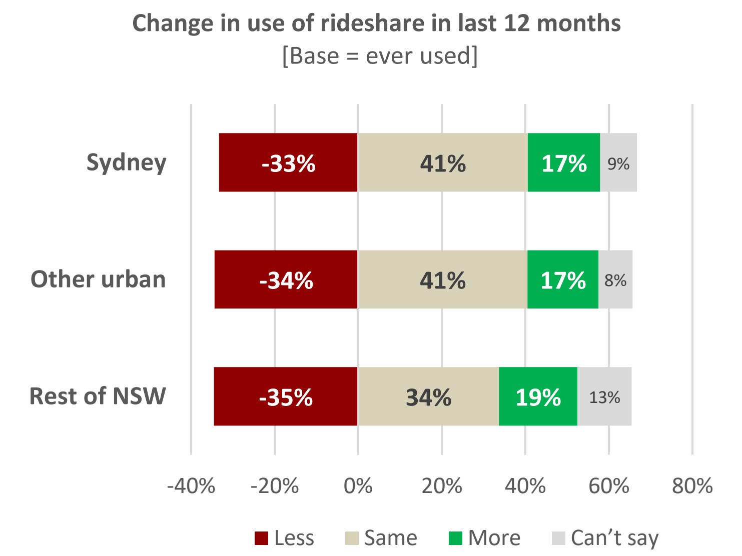
Figure 8: Change in use of transport services in the last 12 months amongst those who have ever used transport services Q16



Base = Ever used each transport type [Sydney n=1,771; Other Urban n=369; Rest of NSW n=271]

Amongst people who had ever used taxis, there was a continuing high level of reported decline – and in 2022 this continued to be higher than in pre-COVID survey years.

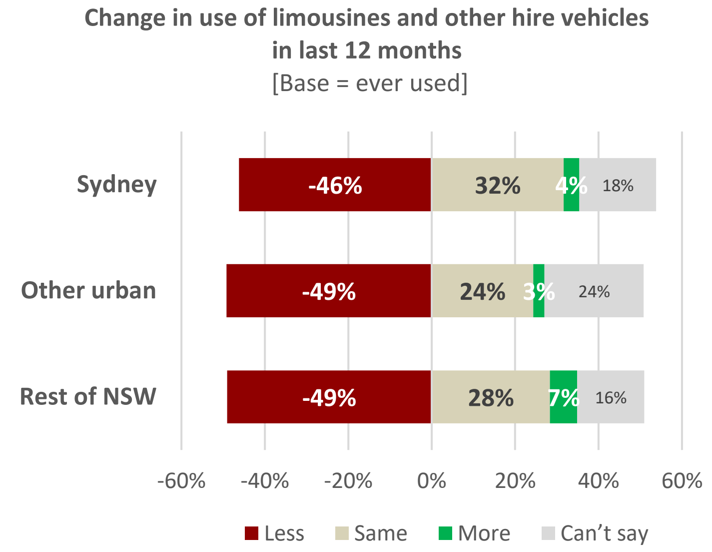
The **nett decline** in Sydney was -33% (42% indicated they used taxis less, compared to 9% who felt they used them more). This is down from -50% in 2020, but remains higher than levels around -25% seen previously. The nett decline in other urban areas was also -33% (the same as in 2020, up from -27% in 2019), and in the rest of NSW was -24% (compared to -28% in 2020 and -20% in 2019).



Base = Ever used each transport type [Sydney n=1,391; Other Urban n=227; Rest of NSW n=98]

Amongst people who had ever used rideshare, pre-COVID surveys had consistently shown a nett positive movement. However, in 2020 rideshare also showed nett declines in use.

In 2022, rideshare users continued to report a **nett decline** in use compared to the previous 12 months. These are smaller than for taxis, but very consistent with 2020. The nett decline in Sydney was -16% (compared to -18% in 2020), -17% in other urban areas (compared to -21%) and -16% in the rest of NSW (compared to -20%). In 2019 nett positive changes of +22%, +21% and +1% respectively had been seen.



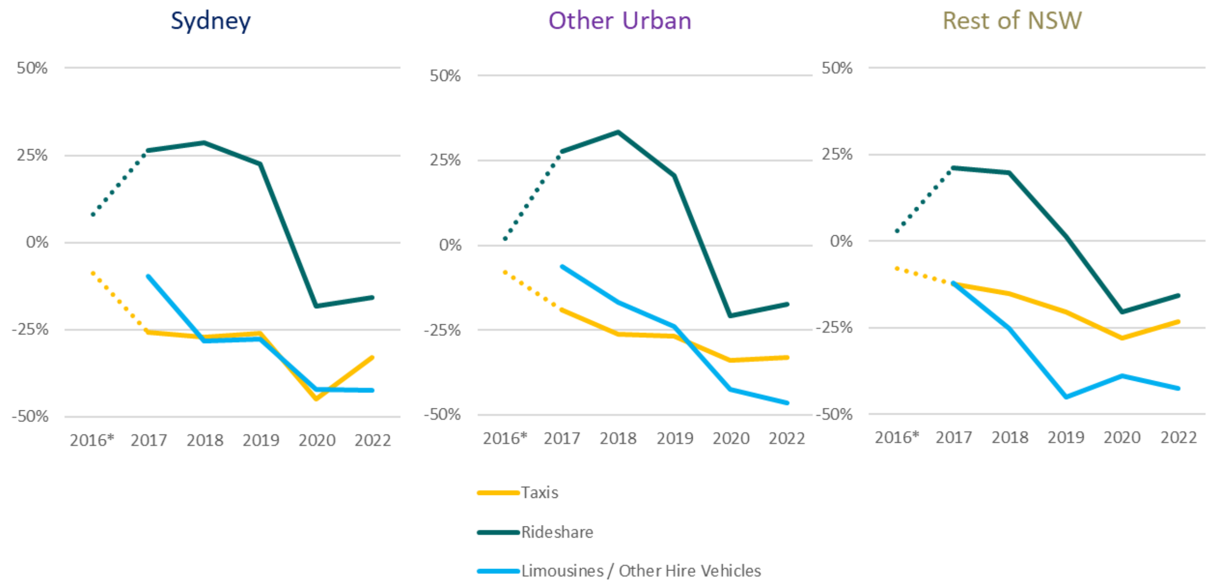
Base = Ever used each transport type [Sydney n=918; Other Urban n=238; Rest of NSW n=103]

Like taxis, respondents who have ever used limousines or other hire vehicles have also report a **nett decline** in all previous surveys (ie: they are using them less often in the last 12 months compared to previous years).

Also like taxis, the nett negative differentials were generally much larger in 2020 and remained that way in 2022. The nett declines of -42% in Sydney, -46% in other urban areas and -42% in the rest of NSW are all within 3% of what was observed in 2020.

Figure 9: Rate of change in use of transport services in the last 12 months amongst those who have ever used transport services. Q16

Chart shows nett differential (i.e: % reported an increase in use minus the proportion who reported a decrease in use)



Note: Small sample sizes apply to the use of limousines and other hire vehicles in the Rest of NSW sample, which largely accounts for the high degree of variability seen in that track.

<u>Reasons for changes in use</u>

For the relatively few people who were using point-to-point transport *more* in the last 12 months, only in Sydney were there sufficient numbers to consider the reasons in any detail. For those who used taxis more, the main reasons were going out more / needing them more, and finding them less expensive. For rideshare that increased need was also apparent, but getting a fare estimate and waiting times were the other most common considerations. COVID-related reasons were equally commonly mentioned by both taxi and rideshare users who used the service more in the last 12 months.

Figure 10: Reasons for using transport services more in the last 12 months Q18

NOTE: Small bases sizes. Interpret grey numbers with caution

Reasons why transport services have been used more in the last 12 months	Taxis			Rideshare services			Limousines or other hire vehicles		
Base = used service more in past 12 months	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*146*	*26*	*19*	*230*	*39*	*15*	*33*	*8*	*7*
I find them **less expensive** than before	23%	17%	4%	**25%**	25%	55%	14%	17%	28%
I have **more disposable income**	14%	4%	4%	13%	8%	9%	22%	31%	13%
I'm **going out more** / needing to get around more	**29%**	19%	52%	**40%**	**31%**	18%	21%	0%	29%
Because I **don't have to wait as long** to catch one, or I think one is **more likely to turn up** after I have booked it	20%	13%	8%	**31%**	**28%**	14%	5%	0%	28%
I have **less access to alternatives**	14%	8%	24%	9%	4%	9%	3%	9%	28%
Because the service for **booking taxis over the phone has improved**	12%	15%	4%						
Because it has become **easier to book taxis with apps** than it was	12%	27%	8%						
Because the **service for booking is better** than it used to be				18%	21%	9%	6%	0%	13%
I think drivers have become **less inclined to take longer routes or overcharge** me	14%	8%	4%	8%	13%	4%	14%	0%	13%
Because I get a **fare estimate quoted** in advance				**39%**	**31%**	38%	10%	23%	39%
I have found that **driver behaviour and knowledge** has improved in [my location]	16%	0%	4%	9%	9%	9%	15%	0%	28%
Because they were **not available previously** or I **did not know** about them before then	5%	9%	4%	6%	16%	16%	6%	0%	13%
Because of things related to **COVID**	23%	21%	6%	20%	13%	5%	9%	23%	15%
For **another reason**	16%	34%	23%	7%	10%	0%	**35%**	43%	14%

Bold figures = 25%+ of respondent group. Green cells = top 3 reasons in Sydney. Note small base sizes in some cases.

NOTES: Note low n values for Rest of NSW and Other Urban.
Data filtered only if used taxi in past 6 months pre-Nov 2017

Why have you used taxis to get around more?

Sydney	Nov 13	Feb 14	Nov 14	Feb 15	Nov 15	Feb 16	Nov 16	Feb 17	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22
Sample size:	335	292	333	302	351	323	296	305	156	177	151	87	146
Less expensive	8%	11%	12%	10%	17%	23%	18%	17%	13%	15%	**22%**	**25%**	**23%**
More disposable income	19%	16%	16%	14%	21%	22%	17%	14%	14%	12%	17%	12%	14%
Going out more	**39%**	**43%**	**40%**	**39%**	**38%**	**37%**	**41%**	**32%**	**28%**	**29%**	**20%**	**21%**	**29%**
Don't have to wait as long	18%	18%	17%	17%	20%	20%	**27%**	23%	13%	19%	19%	20%	20%
Less access to alternatives	**31%**	**27%**	**27%**	**25%**	**30%**	**29%**	24%	23%	12%	11%	11%	15%	14%
Phone booking has improved	11%	14%	15%	10%	15%	13%	21%	13%	10%	14%	13%	12%	12%
Easier to book taxis with apps	13%	15%	18%	11%	14%	17%	22%	12%	13%	15%	16%	14%	12%
Drivers less inclined to take longer routes	10%	8%	6%	5%	6%	9%	8%	8%	10%	10%	10%	9%	14%
Driver behaviour and knowledge improved	8%	10%	6%	7%	8%	11%	10%	8%	13%	9%	14%	11%	16%
Not available (or known) previously	-	-	-	-	-	-	-	-	2%	5%	3%	7%	5%
COVID-related	-	-	-	-	-	-	-	-	-	-	-	**27%**	**23%**
Another reason	**33%**	24%	**26%**	**27%**	20%	19%	16%	17%	**29%**	**31%**	**23%**	21%	16%

	Other urban								Rest of NSW							
	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22
Sample size:	51	54	55	20	26	32	25	26	27	29	26	31	31	31	21	19
Less expensive	14%	7%	13%	20%	10%	**28%**	18%	17%	4%	7%	15%	6%	**16%**	13%	14%	4%
More disposable income	14%	13%	16%	10%	2%	15%	9%	4%	4%	10%	15%	10%	8%	17%	20%	4%
Going out more	**37%**	20%	**29%**	**30%**	**29%**	**37%**	24%	19%	**37%**	**41%**	**42%**	**39%**	**21%**	**25%**	**39%**	**52%**
Don't have to wait as long	18%	17%	18%	10%	24%	25%	25%	13%	7%	21%	15%	0%	0%	16%	5%	8%
Less access to alternatives	**39%**	**33%**	**31%**	20%	15%	18%	**27%**	8%	**26%**	**34%**	**27%**	23%	11%	**20%**	20%	24%
Phone booking has improved	16%	11%	13%	15%	10%	16%	7%	15%	7%	7%	19%	0%	2%	6%	4%	4%
Easier to book taxis with apps	10%	7%	4%	5%	11%	20%	7%	**27%**	11%	3%	12%	0%	10%	4%	4%	8%
Drivers less inclined to take longer routes	12%	0%	7%	5%	6%	18%	11%	8%	7%	10%	15%	0%	0%	7%	4%	4%
Driver behaviour and knowledge improved	16%	7%	13%	10%	6%	12%	13%	0%	11%	7%	19%	0%	7%	6%	5%	4%
Not available (or known) previously	-	-	-	0%	0%	3%	6%	9%	-	-	-	0%	0%	3%	3%	4%
COVID-related	-	-	-	-	-	-	9%	21%	-	-	-	-	-	-	18%	6%
Another reason	**25%**	**37%**	20%	**30%**	**38%**	9%	**29%**	**34%**	**41%**	24%	**42%**	**45%**	**40%**	**27%**	23%	23%

Bold figures show the top 3 responses for each survey

Reasons for **using types of transport services *less*** in the last 12 months typically tend to show a similar overall story. The patterns seen have been very stable since 2017, including in the last two COVID-effected surveys. Taxis are often used less for cost reasons – feeling more expensive than in the past. In Sydney, and to a lesser extent in other urban areas, replacement of taxis with rideshare has also been consistently seen. Outside of Sydney, declining primary demand (including due to better access to a car and going out less / less need to get around) has reduced taxi usage. Fewer respondents tend to have reduced their use of rideshare, but where this had happened in Sydney (the only location with a sufficient sample to really consider), this was mostly due to less need and greater availability of other options, rather than due to competitive perceptions.

Unsurprisingly across the types of transport, in 2020 and 2022, COVID-related reasons and going out less / less need to get around have been the key reasons for lower use of point-to-point transport.

Figure 11: Reasons for using transport services less in the last 12 months Q19

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution

Reasons why transport services have been used less in the last 12 months	Taxis			Rideshare services			Limousines or other hire vehicles		
Base = used service less in past 12 months	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*744*	*144*	*93*	*472*	*72*	*35*	*476*	*124*	*46*
I find them **more expensive** than before	**29%**	23%	18%	12%	10%	3%	13%	21%	15%
I have **less disposable income**	9%	10%	14%	8%	6%	9%	9%	6%	13%
Because **peak or surge pricing** makes them too expensive	10%	5%	6%	15%	7%	9%	4%	4%	9%
I'm **going out less** / have less need to get around	**39%**	**44%**	**47%**	**44%**	**39%**	**43%**	**28%**	**31%**	**39%**
Because I find I have to **wait longer** than I used to catch a one, or I **can't rely on one turning up** after I have booked it	10%	8%	5%	6%	10%	9%	2%	3%	0%
I have **better access to a car**	18%	**31%**	**30%**	19%	18%	20%	12%	19%	**33%**
Public transport has improved when I need it	17%	7%	4%	12%	6%	0%	8%	7%	7%
I **use taxis** instead				6%	3%	6%	7%	9%	4%
I **use limousine or other hire vehicle** services instead	2%	2%	0%	1%	1%	0%			
I **use rideshare** services instead	**28%**	18%	5%				11%	10%	9%
I **use car share, community transport** or **courtesy buses** instead	3%	2%	1%	3%	0%	0%	4%	2%	0%
Because **booking services have become worse**	5%	6%	4%	3%	0%	9%	3%	1%	2%
I have found that **driver behaviour and knowledge** has become worse in [AREA]	10%	5%	2%	5%	1%	6%	16%	6%	4%
I think drivers have become more inclined to **take longer routes or overcharge** me	11%	4%	2%	4%	0%	6%	1%	1%	2%
I have found that **driver behaviour and knowledge** has become worse in [AREA]	10%	5%	2%	5%	1%	6%	16%	6%	4%
Because of things related to **COVID**	**45%**	**47%**	**38%**	**52%**	**60%**	**57%**	**31%**	**46%**	**37%**
For **another reason**	5%	6%	12%	5%	7%	14%	14%	12%	13%

Bold figures = 25%+ of respondent group. Pink cells = top 3 reasons in Sydney. Note small base sizes in some cases.

NOTES: Note low n values for Rest of NSW and Other Urban.
Data filtered only if used taxi in past 6 months pre-Nov 2017

Why have you used taxis to get around less?

Sydney

	Nov 13	Feb 14	Nov 14	Feb 15	Nov 15	Feb 16	Nov 16	Feb 17	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22
Sample size:	335	292	333	302	351	323	296	305	632	697	637	876	744
More expensive	**59%**	**51%**	**50%**	**54%**	**53%**	**60%**	**53%**	**60%**	**46%**	**47%**	**50%**	**33%**	**31%**
Less disposable income	**29%**	22%	22%	22%	21%	23%	17%	13%	12%	11%	10%	12%	9%
Peak or surge pricing	-	-	-	-	-	-	-	-	11%	13%	17%	10%	10%
Going out less	**36%**	**34%**	**32%**	**37%**	**35%**	**32%**	**28%**	**29%**	18%	19%	18%	**43%**	**38%**
Have to wait longer	17%	13%	16%	16%	14%	18%	22%	**26%**	18%	**25%**	21%	14%	11%
Better access to a car	**27%**	17%	**27%**	20%	22%	17%	16%	23%	22%	19%	17%	17%	17%
Public transport improved	22%	23%	**25%**	**26%**	23%	24%	23%	21%	**24%**	23%	**22%**	19%	17%
Use limousine/other hire vehicle	-	-	-	-	-	-	-	-	4%	6%	3%	2%	2%
Use rideshare	-	-	-	-	16%	22%	**31%**	**39%**	**37%**	**41%**	**44%**	**33%**	30%
Use car share, community transport or courtesy buses	-	-	-	-	13%	16%	6%	5%	5%	3%	3%	3%	3%
Booking services have become worse	6%	6%	6%	5%	4%	5%	7%	7%	7%	8%	7%	4%	5%
Drivers more inclined to take longer routes	21%	17%	16%	16%	18%	16%	16%	19%	23%	24%	19%	10%	10%
Driver behaviour/ knowledge worse	**26%**	13%	16%	13%	14%	14%	16%	19%	18%	21%	16%	12%	12%
COVID-related reasons	-	-	-	-	-	-	-	-	-	-	-	**42%**	**43%**
Another reason	7%	14%	11%	9%	7%	6%	8%	4%	10%	9%	11%	7%	5%

Other urban

	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22
Sample size:	46	62	54	96	130	144	139	144
More expensive	**39%**	**48%**	**43%**	**41%**	**41%**	**46%**	**29%**	26%
Less disposable income	**35%**	**27%**	**26%**	16%	16%	17%	10%	12%
Peak or surge pricing	-	-	-	20%	11%	13%	10%	6%
Going out less	**43%**	**34%**	**43%**	**25%**	23%	**26%**	**42%**	**42%**
Have to wait longer	11%	16%	19%	13%	22%	17%	14%	8%
Better access to a car	20%	**34%**	**39%**	**31%**	**31%**	**27%**	**34%**	**28%**
Public transport improved	11%	10%	15%	13%	16%	14%	6%	6%
Use limousine/other hire vehicle	-	-	-	7%	3%	3%	2%	1%
Use rideshare	-	5%	19%	17%	23%	**32%**	21%	21%
Use car share, community transport or courtesy buses	-	10%	4%	5%	4%	4%	1%	2%
Booking services have become worse	2%	6%	7%	10%	9%	6%	4%	6%
Drivers more inclined to take longer routes	9%	8%	13%	14%	13%	5%	10%	5%
Driver behaviour/ knowledge worse	7%	5%	9%	13%	16%	8%	12%	4%
COVID-related reasons	-	-	-	-	-	-	**39%**	**47%**
Another reason	7%	3%	6%	14%	7%	9%	10%	5%

Rest of NSW

	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22
Sample size:	29	22	17	72	82	101	95	93
More expensive	34%	41%	47%	**43%**	**41%**	**39%**	**30%**	20%
Less disposable income	24%	32%	18%	17%	14%	14%	13%	13%
Peak or surge pricing	-	-	-	14%	8%	13%	5%	7%
Going out less	45%	36%	59%	**38%**	**28%**	**34%**	**40%**	**47%**
Have to wait longer	3%	5%	6%	13%	12%	5%	5%	5%
Better access to a car	48%	27%	35%	**26%**	**45%**	**36%**	**28%**	**30%**
Public transport improved	3%	5%	6%	6%	5%	6%	2%	4%
Use limousine/other hire vehicle	-	-	-	3%	2%	0%	1%	0%
Use rideshare	-	0%	0%	14%	9%	12%	12%	6%
Use car share, community transport or courtesy buses	-	14%	6%	1%	4%	1%	3%	1%
Booking services have become worse	3%	0%	0%	7%	7%	3%	3%	5%
Drivers more inclined to take longer routes	7%	0%	6%	6%	5%	3%	4%	2%
Driver behaviour/ knowledge worse	3%	0%	18%	7%	9%	5%	8%	2%
COVID-related reasons	-	-	-	-	-	-	**28%**	**36%**
Another reason	3%	9%	18%	13%	9%	11%	13%	10%

Bold figures show the top 3 responses for each survey

The previous tables reflect the standard reasons included in the annual survey for using point-to-point transport options more or less in the last 12 months, with an additional option of 'COVID related reasons' to reflect the experience in 2020 and 2022.

However, it was also felt important to have an explicit indication from respondents as to what proportion of their change in use was due to COVID. Two additional questions were included in the 2020 survey, and repeated in 2022.

The responses in 2022 show a similar pattern as in 2020. For taxi users who varied their use in the previous 12 months, COVID-related factors were at least somewhat involved to an equal extent for those who used taxis more as for those who used taxis less. However, for users of rideshare, COVID was more commonly a factor for those who used rideshare less. As noted in the 2020 survey, this suggests that a greater proportion of taxi users who used taxis less would have done so whether or not COVID had impacted their usage – which is consistent with the overall declines in use of taxis consistently seen across the last five survey waves.

Supplementary Figure: Impact of COVID as a reason for using transport services more or less in the last 12 months Q18a/Q19a

Extent to which increased use is…	Taxis			Rideshare			Limousines or other hire vehicles		
Base: Respondents reporting increased use	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*146*	*26*	*19*	*230*	*39*	*15*	*33*	*8*	*7*
Completely related to COVID	14%	8%	11%	10%	5%	7%	25%	18%	0%
Mostly related	26%	8%	7%	18%	20%	5%	25%	17%	0%
Somewhat related	29%	27%	50%	29%	21%	16%	13%	48%	59%
At least somewhat related	69%	44%	68%	57%	45%	27%	63%	83%	59%
Not very much related	10%	21%	5%	21%	21%	41%	11%	0%	29%
Not at all related to COVID	21%	35%	28%	21%	34%	32%	26%	17%	12%
Not very or not at all related	31%	56%	32%	43%	55%	73%	37%	17%	41%

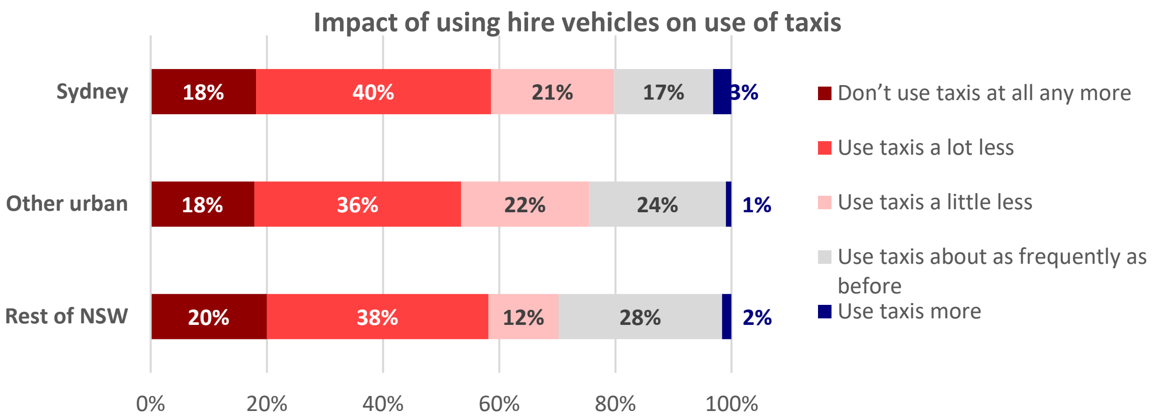
Extent to which decreased use is…	Taxis			Rideshare			Limousines or other hire vehicles		
Base: Respondents reporting decreased use	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*744*	*144*	*93*	*472*	*72*	*35*	*429*	*122*	*45*
Completely related to COVID	23%	27%	19%	30%	36%	28%	25%	27%	18%
Mostly related	24%	16%	16%	35%	25%	36%	20%	19%	26%
Somewhat related	19%	15%	23%	19%	13%	17%	17%	13%	23%
At least somewhat related	66%	57%	57%	85%	74%	82%	62%	60%	68%
Not very much related	14%	17%	14%	7%	8%	4%	10%	16%	5%
Not at all related to COVID	20%	25%	29%	8%	18%	15%	28%	24%	27%
Not very or not at all related	34%	43%	43%	15%	26%	18%	38%	40%	32%

Impact of using hire vehicles in the last 6 months

Given the ongoing trend of a nett decline in the use of taxis and a nett increase in the use of rideshare, it is not surprising that the reported impact of hire vehicles[1] has been a reduction in use of taxis. The chart below is based on respondents who have *ever* used taxis *and* who have also used rideshare in their location in the last 6 months.

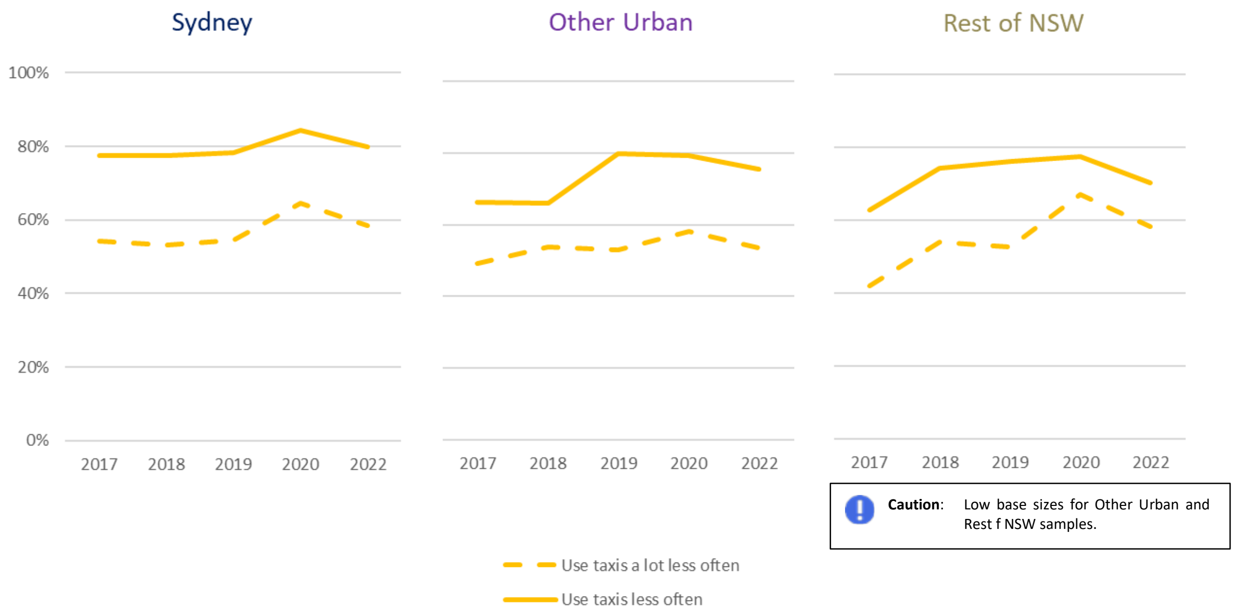
It shows that across the three locations, "*as a result of* using hire vehicles" 18%-20% of respondents now no longer use taxis at all, and more than three-quarters report at least some level of decline in their taxi usage. While the exact magnitudes vary somewhat, the general pattern of the results observed is quite consistent across locations. The proportion who use taxis *a lot less often* was higher across all locations in 2020 – and though it fell back a little, it stayed that way in 2022.

Figure 12: Reported Impact of using hire vehicles on the use of taxis amongst users of both services Q17



Base = Used hire vehicles in the last 6 months and ever used taxis [Sydney n=862; Other Urban n=111; Rest of NSW n=53]

Figure 13: Changes in reported impact of using hire vehicles on the use of taxis amongst users of both services (proportion of taxi users whose use has declined) Q17



[1] Could be *rideshare* and / or *limousines and other hire vehicles* in this question

Problems

Failed Trips

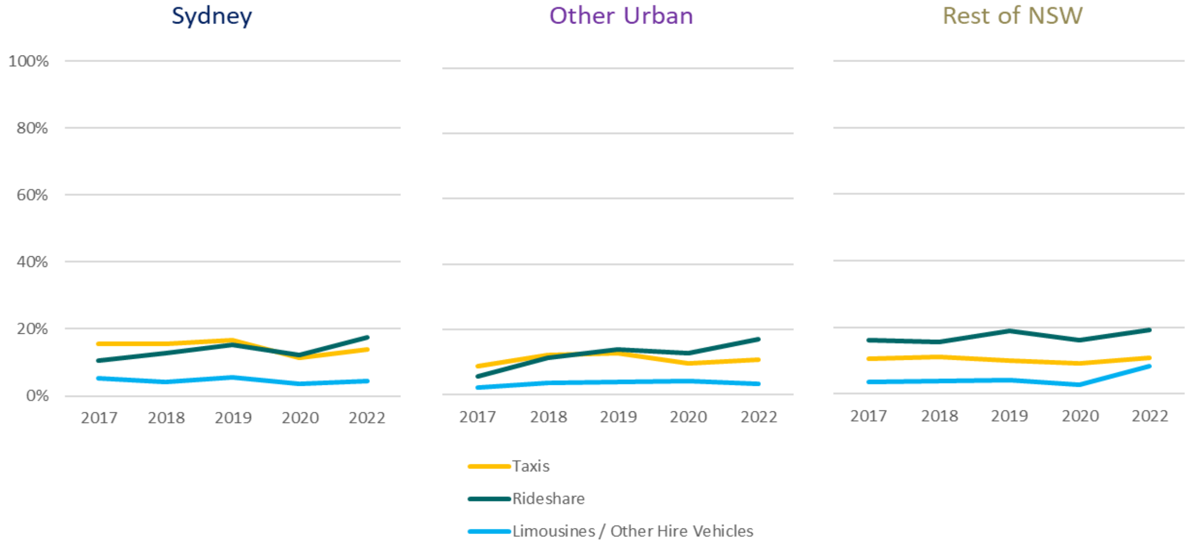
<u>Of those aware of the services operating in their area,</u> small but noticeable minorities of respondents in each location typically report 'failed' trips within the 6 months prior to the survey – that is, where they had tried to use forms of transport and not been able to. Unsurprisingly given their relative usage, this is generally much less common for limousines and other hire vehicles than it is for taxis and rideshare, where the proportions have been approximately comparable.

The tracking charts confirm what the 2022 results suggest, which is that the proportion of people experiencing failed rideshare trips has been growing, and in the 2022 survey was more common than for taxis in all locations. The proportion reporting failed taxi trips has remained very consistent since 2017, while rideshare failed trips have trended upwards in Sydney and other urban areas.

Figure 14: Prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14

Base = Aware of services [Sydney n=1,624-2,003; Other Urban n=388-509; Rest of NSW n=191-371]

Figure 15: Change in prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14



All respondents

Figure 16: Prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location AND all respondents)* Q14

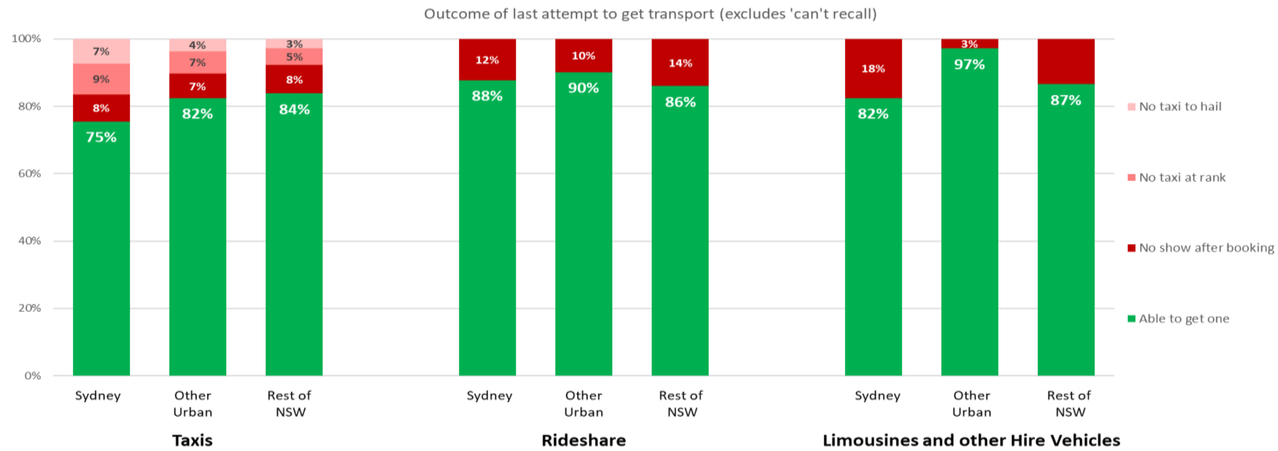
Use in the last 6 months		Taxis			Rideshare services			Limousines or other hire vehicles		
		Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
% of those aware of service in location	**2022**	**14%**	**11%**	**11%**	**18%**	**17%**	**19%**	**5%**	**3%**	**8%**
	Sample size	*2,003*	*509*	*371*	*1,935*	*420*	*194*	*1,624*	*388*	*191*
	2020	12%	10%	9%	12%	13%	16%	4%	4%	3%
	Sample size	*1,962*	*480*	*378*	*1,909*	*400*	*191*	*1,589*	*373*	*203*
	2019	17%	13%	10%	15%	14%	19%	6%	4%	4%
	Sample size	*2,040*	*498*	*416*	*1,968*	*420*	*191*	*1,626*	*399*	*233*
	2018	16%	12%	11%	13%	11%	15%	4%	3%	4%
	Sample size	*2,103*	*523*	*439*	*2,015*	*406*	*193*	*1,781*	*432*	*247*
	2017	15%	9%	11%	11%	5%	16%	5%	2%	3%
	Sample size	*2,009*	*487*	*415*	*1,825*	*297*	*131*	*1,686*	*374*	*202*
% of all respondents	**2022**	**14%**	**10%**	**10%**	**17%**	**14%**	**10%**	**3%**	**2%**	**4%**
	Sample size	*2,070*	*541*	*412*	*2,070*	*541*	*412*	*2,070*	*541*	*412*
	2020	11%	9%	8%	11%	10%	8%	3%	3%	1%
	Sample size	*2,026*	*508*	*407*	*2,026*	*508*	*407*	*2,026*	*508*	*407*
	2019	16%	12%	9%	14%	11%	8%	4%	3%	2%
	Sample size	*2,095*	*522*	*446*	*2,095*	*522*	*446*	*2,095*	*522*	*446*
	2018	15%	12%	10%	12%	9%	7%	4%	3%	2%
	Sample size	*2,147*	*533*	*478*	*2,147*	*533*	*478*	*2,147*	*533*	*478*
	2017	15%	8%	10%	9%	3%	5%	4%	2%	2%
	Sample size	*2,048*	*501*	*453*	*2,048*	*501*	*453*	*2,048*	*501*	*453*

Outcome of last attempt

Despite the increase in the proportion of rideshare users who report any failed trip in the last six months, the proportion of users who successfully got a rideshare on their very last attempt remains higher than for taxis. In part, this is because failed attempts to get taxis also include rank and hail attempts, which do not apply to rideshare (or limousines or other hire vehicles).

In 2022 75-84% of users reported successfully getting a taxi on their last attempt, while 86-90% of rideshare users did.

Figure 17: Outcome of last attempt to obtain transport among users who could recall the outcome
(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses) Q30

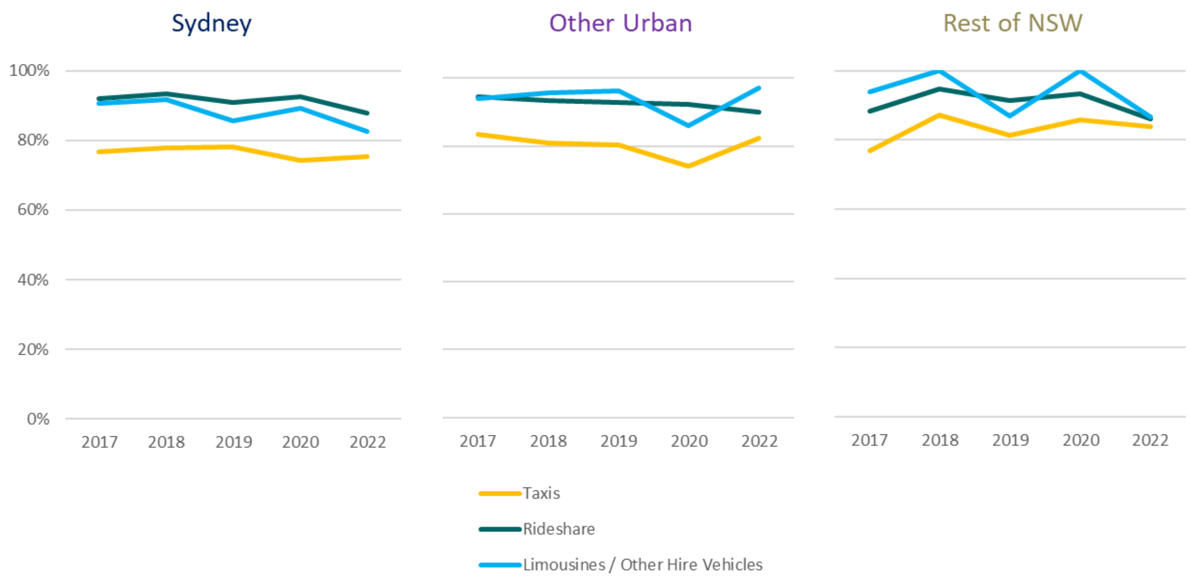


Base = Used services in the last 12 months, excludes 'can't recall outcome' responses
[Sydney n=216-980; Other Urban n=41-147; Rest of NSW n=23-114]

Rank and hail difficulties are peculiar to taxis, but failure to show after booking is a failure common to all services. Rideshare had a post-booking failure rate of 10-14%, somewhat higher than the 7%-8% in 2019 and 2020. When isolated in this way, taxis had a no-show failure rate of 8%-16% across locations (similar to 2020, and slightly higher than the 8%-10% fail rate in 2019).

The tracking chart below shows that the overall success rates for rideshare are trending very slightly downwards, while taxis remain fairly consistent over the five-survey tracking period. Success rates for limousines and other hire vehicles fluctuate much more due to the effect of small sample sizes, but results from the last two surveys suggest there may have been some impact of COVID n the reliability of these services.

Figure 18: Change in success rate for last attempt among users who could recall the outcome
(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses) Q30



Actions when unable to get transport

Only sometimes when a respondent was last unable to get their preferred form of transport did they end up not making the trip at all – with this happening around 1-in-5 times when a taxi was unavailable, and slightly less of the times (14-15%) when rideshare services were unable to be accessed.

Taxis and rideshare pick up a substantial proportion of the cases where the other was not able to be used, with public transport and self-travel covering most other cases. Alternative solutions remain fairly similar across taxis and rideshare. For those unable to get a limousine or other hire vehicle in Sydney in 2022, taxis and rideshare were equally likely to be used instead, but with around half using public transport instead.

In other urban areas, a broadly similar pattern is seen to Sydney, but predictably with less alternative use of public transport options.

Figure 19: Actions taken when unable to get point-to-point transport Q15/31

NOTE: * Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution

Actions taken when last unable to get point-to-point transport Multiple responses allowed, so columns add to more than 100%	When last unable to get a **taxi**			When last unable to get a **rideshare**			When last unable to get a **limousines or other hire vehicle**		
Base: *Combined responses from any failed attempt in last 12 months (Q14/15) OR if last attempt was unsuccessful (q30/31)*	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*257*	*48*	*35*	*309*	*63*	*34*	*64*	*11*	*12*
Took a train	**42%**	20%	31%	**42%**	**20%**	27%	**25%**	9%	36%
Used a **rideshare** service instead	**33%**	**36%**	24%				21%	9%	42%
Took a regular bus (ie, not a courtesy bus)	**26%**	8%	24%	**26%**	17%	30%	**23%**	0%	55%
Drove myself or got a lift	**21%**	**43%**	48%	**28%**	**47%**	38%	17%	22%	28%
Walked or cycled	16%	**26%**	18%	19%	**23%**	10%	11%	28%	5%
Decided not to make the journey at all	22%	17%	22%	15%	14%	25%	14%	19%	47%
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	15%	4%	10%	10%	9%	5%	19%	10%	13%
Used a limousine or other hire vehicle service	8%	4%	0%	7%	3%	14%			
Used courtesy transport provided by a venue such as a pub or club	9%	5%	21%	6%	11%	14%	13%	9%	6%
Used a bikeshare service	8%	4%	0%	5%	1%	0%	12%	18%	0%
Used a car sharing service such as GoGet or Car Next Door	9%	6%	0%	7%	5%	0%	8%	9%	0%
Used a **taxi** instead				**28%**	**38%**	26%	**22%**	9%	5%
Something else	6%	8%	5%	8%	3%	7%	17%	18%	4%
Can't recall	3%	3%	6%	4%	2%	0%	7%	23%	7%

Bold figures = 20%+ of respondent group. Note small base sizes in some cases.

The longer-term trends observed in the following tables show rideshare as an alternative when taxis are not available significantly starting around 2016 and 2017. Over the past few surveys this proportion has not continued to grow in Sydney, but does continue to increase in other urban areas and the rest of NSW.

In Sydney, use of public transport when taxis are not available was lower in 2018 – but in 2020 and 2022, public transport options were commonly reported amongst people when not able to use taxis. The proportion not making the journey at all when taxis are not available has been somewhat higher in the last two COVID-era survey waves.

NOTES: * November 2016 asked the question as a single response and is not directly comparable with other years. Note low n values for Other Urban and Rest of NSW in previous years.

On the last occasion you were unable to use a taxi, what did you do instead?

Sydney	Nov-13	Feb-14	Nov-14	Feb-15	Nov-15	Feb-16	Nov-16	Feb-17	Nov-17	Nov-18	Nov-19	Nov-20	Mar-22
Sample size	*209*	*120*	*254*	*199*	*279*	*266*	*248**	*224*	*311*	*469*	*453*	*227*	*257*
Took a train	**31%**	**34%**	**36%**	**29%**	**33%**	**35%**	29%	**29%**	**35%**	**22%**	**33%**	**42%**	**42%**
Used a rideshare service instead			2%	2%	3%	8%	12%	21%	**32%**	**31%**	**29%**	**38%**	**33%**
Took a regular bus	**32%**	**26%**	**28%**	**40%**	**30%**	**27%**	17%	**25%**	**25%**	**21%**	**21%**	**28%**	**26%**
Drove myself or got a lift	**23%**	**22%**	**22%**	**19%**	**20%**	16%	15%	**21%**	24%	19%	17%	21%	21%
Walked or cycled	17%	18%	15%	14%	18%	14%	9%	9%	18%	14%	14%	18%	16%
No journey	12%	17%	12%	9%	13%	**18%**	8%	8%	12%	10%	14%	17%	22%
Used community transport	6%	2%	8%	8%	10%	7%	6%	8%	12%	9%	9%	14%	15%
Used a limo or other hire vehicle service	2%	3%	3%	3%	7%	7%	2%	7%	10%	7%	7%	13%	8%
Used courtesy transport					2%	2%	0%	2%	8%	5%	8%	8%	9%
Used a bike sharing service										6%	6%	6%	8%
Used a car sharing service			2%	1%	3%	3%	1%	3%	9%	4%	5%	6%	9%
Something else									8%	8%	8%	9%	6%
Can't recall									8%	4%	5%	5%	3%

	Other Urban								Rest of NSW							
	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-20	Mar-22	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-20	Mar-22
Sample size	*39*	*47*	*23**	*42*	*85*	*87*	*36*	*48*	*9*	*13*	*6**	*44*	*61*	*64*	*29*	*35*
Took a train	13%	11%	9%	24%	**17%**	16%	20%	20%	0%	0%	0%	14%	9%	**15%**	14%	**31%**
Used a rideshare service instead	0%	4%	4%	17%	**17%**	**25%**	**32%**	**36%**	0%	0%	0%	14%	**15%**	10%	**14%**	**24%**
Took a regular bus	**28%**	**23%**	35%	**14%**	**18%**	**18%**	**16%**	8%	33%	8%	17%	9%	12%	13%	**10%**	**24%**
Drove myself or got a lift	**28%**	**36%**	22%	**29%**	**30%**	**22%**	**31%**	**43%**	33%	8%	33%	**27%**	**15%**	**18%**	**32%**	**48%**
Walked or cycled	21%	13%	13%	**31%**	15%	13%	29%	**26%**	22%	62%	33%	**32%**	**31%**	**16%**	27%	18%
No journey	**23%**	**17%**	9%	14%	9%	12%	23%	17%	11%	15%	17%	20%	10%	**15%**	5%	22%
Used community transport	8%	11%	4%	7%	3%	7%	6%	4%	0%	0%	0%	7%	3%	7%	10%	10%
Used a limo or other hire vehicle service	3%	4%	4%	10%	9%	2%	5%	4%	0%	0%	0%	5%	1%	3%	4%	0%
Used courtesy transport		4%	0%	5%	5%	7%	7%	5%		8%	0%	2%	4%	7%	2%	21%
Used a bike sharing service					0%	3%	0%	4%					0%	5%	7%	0%
Used a car sharing service	0%	0%	0%	7%	0%	2%	0%	6%	0%	0%	0%	5%	0%	4%	7%	0%
Something else				2%	4%	9%	1%	8%				**9%**	7%	5%	9%	5%
Can't recall				14%	2%	5%	5%	3%				14%	9%	5%	8%	6%

Bold figures show the top 3 responses in each survey

Problems Experienced

There are a range of problems that people can experience using point-to-point transport services, ranging from obtaining a vehicle, driver skill and service, and cost. Over the life of the surveys, people in Sydney and users of taxis have typically reported higher levels of problems overall – however, this pattern is less evident in 2022.

Sydney respondents did report higher levels of problems with taxis, but not with rideshare or with limousines or other hire vehicles. Slightly more users reported a problem with taxis than with rideshare in Sydney, but the reverse was the case in other urban areas.

37% of taxi users in Sydney reported no problems at all, comparable to the 35-40% seen in all surveys going back to 2017. 47% of taxi users in other urban areas reported no problems, compared to 49-50% in 2019-20. 50% reported no problems in the rest of NSW, compared to 46%-51% in the two previous surveys. The most common problems in Sydney were route knowledge and over-charging, while obtaining a taxi was more of a problem outside of Sydney.

The proportion of Sydney rideshare users who report no problems has decreased from over 50% in the last three years to 43% in 2022; and declined steadily from above 60% in 2017 to just 44% in in other urban areas in 2022. The most common problems reported across all areas are surge pricing, route knowledge and difficulty in obtaining a car.

Figure 20: Problems experienced using point-to-point transport amongst users Q28

NOTE: Small bases sizes for Rest of NSW.

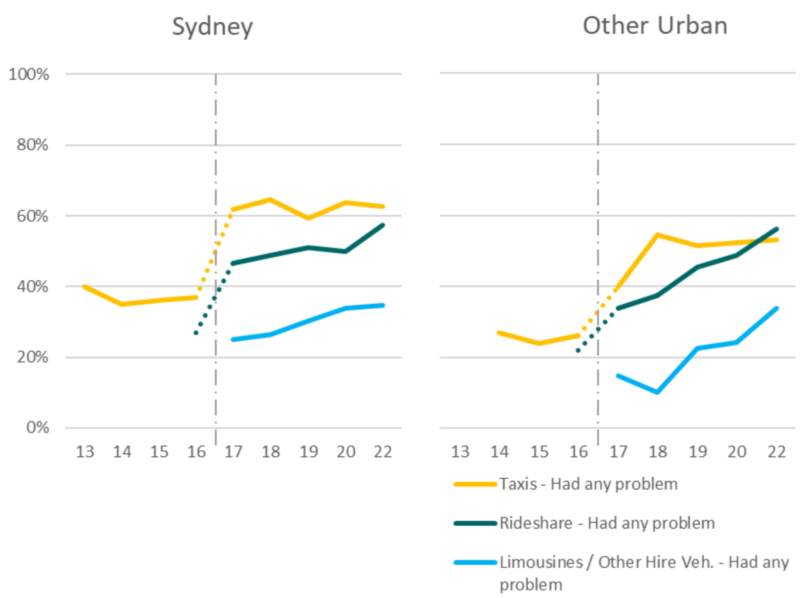
Problems experienced using point-to-point transport *Multiple responses allowed, so columns add to more than 100%*	Using **taxis**			Using **rideshare** services			Using **limousines** or **other hire vehicles**		
Base = used service more in past 12 months	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*931*	*162*	*122*	*1073*	*158*	*62*	*248*	*49*	*27*
Had **no problems**	**37%**	**47%**	**50%**	**43%**	**44%**	**37%**	**65%**	**66%**	**54%**
Driver did not take the most **direct** route	**21%**	**18%**	13%	**15%**	13%	**20%**	7%	8%	4%
Driver did not know **where they were going**	**19%**	11%	10%	10%	9%	**17%**	3%	7%	7%
I was **overcharged**	**19%**	9%	7%	9%	8%	3%	8%	11%	3%
Difficulty getting one at a **major event**	**17%**	**18%**	**19%**	14%	**19%**	**17%**	6%	6%	**26%**
Peak or surge **price**	**15%**	**17%**	12%	**25%**	**30%**	**18%**	5%	4%	3%
COVID-19 cleanliness or hygiene	**15%**	7%	7%	9%	8%	7%	5%	7%	0%
Difficulty getting one at some **other time**	**15%**	**17%**	**20%**	13%	**23%**	**28%**	6%	10%	**29%**
Driver was **rude, unhelpful** or **offensive**	12%	6%	3%	6%	2%	3%	4%	0%	6%
Unsafe (driving manner, breaking road rules)	7%	4%	5%	6%	5%	1%	1%	0%	7%
Driver **refused destination**	6%	2%	3%	2%	0%	0%	2%	4%	0%
Something else	4%	4%	1%	3%	2%	2%	2%	0%	0%

Bold figures = 15%+ of respondent group. Most "something else" responses were back-coded into existing categories.
Note small base sizes in some cases.

The methodology behind this question was changed from the 2017 survey onwards. Previously the question asked whether the user had experienced any problems, and only then for details if they said yes. From 2017, the question presents the list of potential problems, and the proportion recorded here are those who say they had *none of these experiences*. This revised approach is more likely to result in higher reporting, as it both prompts respondents for experiences they may not spontaneously recall, and also makes clear what is meant by *'a problem'*. For this reason, the pre-2017 and post-2017 data in the tracking charts is connected with a dotted line.

In Sydney and other urban areas, from 2017-2020 taxi users tended to report a higher level of experiencing any problem than did rideshare users. However, in 2022 rideshare and taxi users were approximately just as likely to report experiencing at least one problem in the last 12 months, with these figures sharply higher for rideshare in 2022 – but steady for taxis. Over the past three surveys the level of problems reported has been flat in all locations for taxis, and risen for rideshare. Interestingly, the level of experiencing problems has also risen in all areas for limousines and other hire vehicles across the five years of the current survey question.

Figure 21: Change in experiencing ANY problem using point-to-point transport amongst users Q28



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

ORIMA

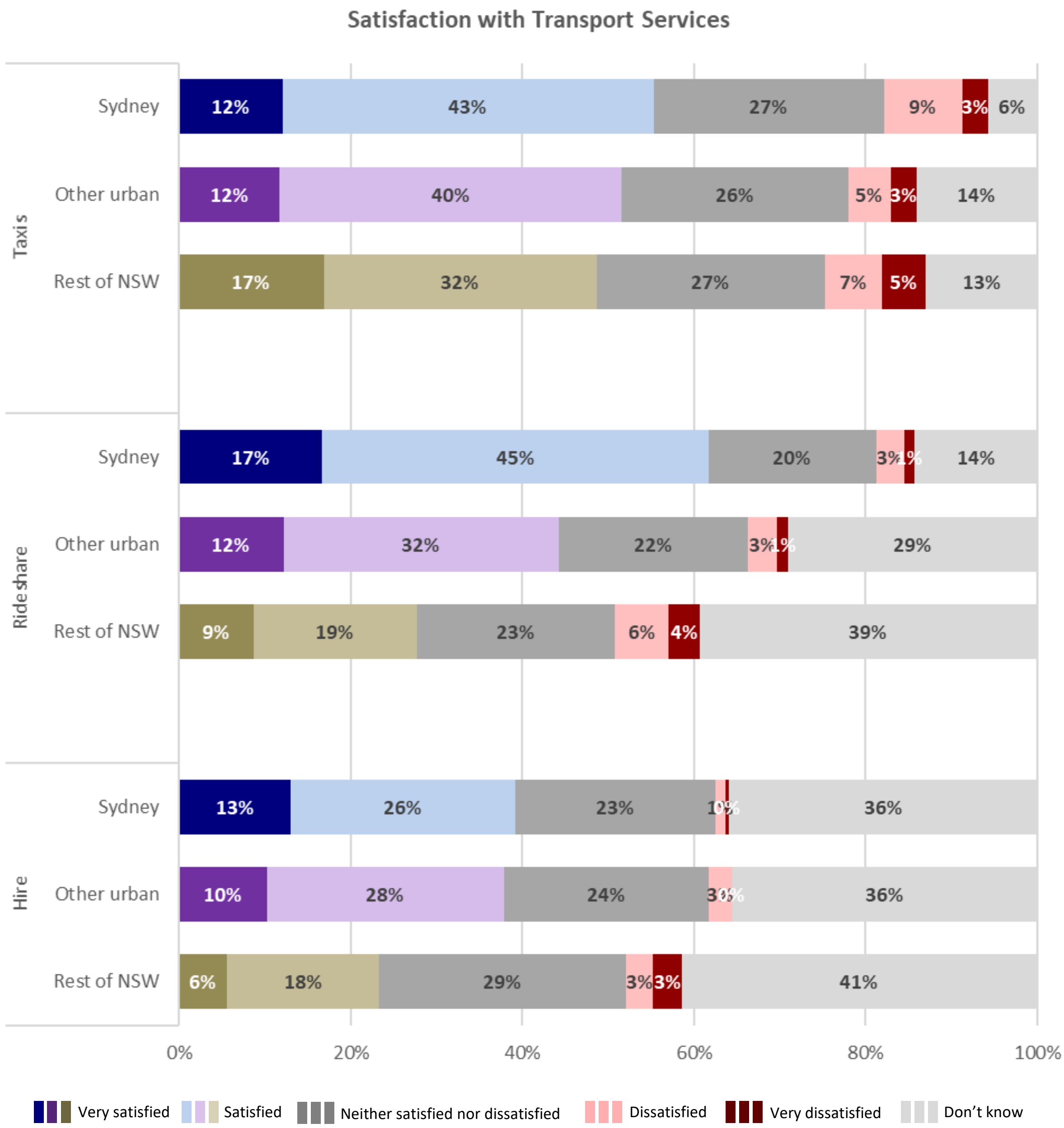
Satisfaction with Services

Satisfaction with taxi services amongst all respondents (not just users) remains moderately strong at 49-55% across all locations, and within +4pp of the 2020 figures.

Satisfaction with rideshare services is higher than taxis in Sydney (62% v 55%), but lower in other urban (44% v 52%) and in the rest of NSW (28% v 49%). These figures were also within +4pp of 2020.

Absolute satisfaction with limousines and other hire vehicle services remains considerably lower, but also within +4pp of 2020.

Figure 22: Satisfaction with point-to-point transport services Q7/10



	Taxis			Rideshare			Limousines or other hire vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*2070*	*541*	*412*	*2070*	*541*	*412*	*2070*	*541*	*412*
Satisfied	55%	52%	49%	62%	44%	28%	39%	38%	23%
Dissatisfied	12%	8%	12%	5%	5%	10%	2%	3%	7%
Differential	+43%	+44%	+37%	+57%	+39%	+18%	+38%	+35%	+17%
Compared to 2019	*+4%*	*+2%*	*-7%*	*-4%*	*-3%*	*+2%*	*+%*	*-3%*	*-8%*

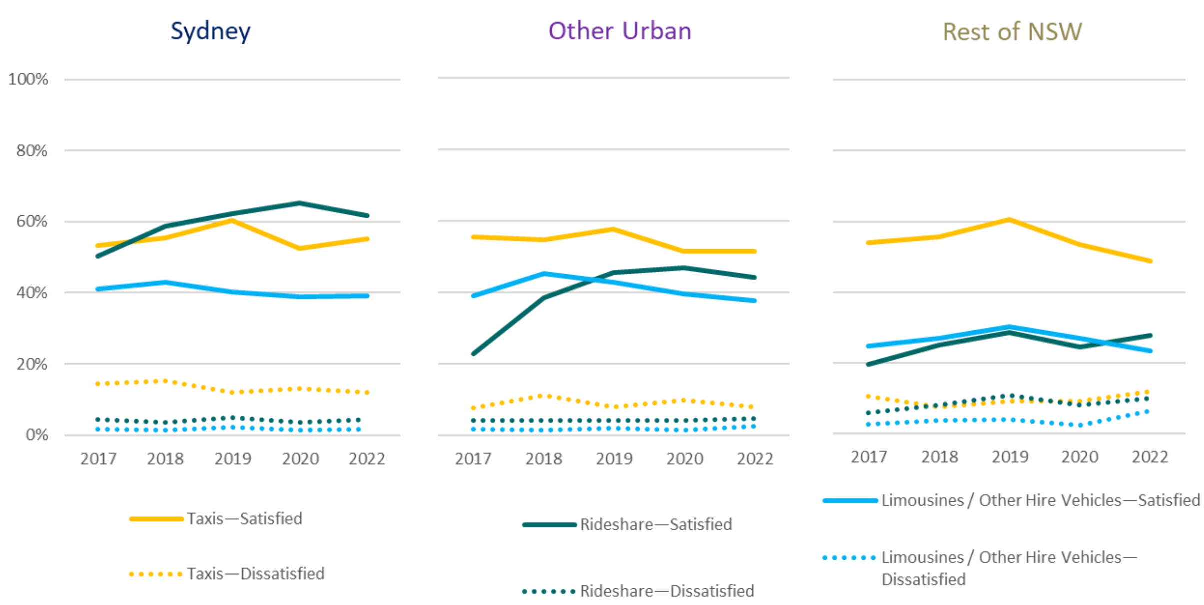
Base = All respondents [Sydney n=2,070; Other Urban n=541; Rest of NSW n=412]

* Differential = % (Very satisfied + Satisfied) minus % (Very dissatisfied + Dissatisfied). The higher the differential, the better the perceived value. *Note: differentials are based on results to one decimal place, and may look different to the rounded whole numbers shown in the table.*

While many of the indicators in the 2019 survey showed a plateauing of penetration and use of rideshare services, satisfaction with available rideshare services continued to increase. At the same time, satisfaction with taxi services had also increased and active dissatisfaction reduced slightly. In 2020 satisfaction with taxi services in all locations then decreased a little, while satisfaction with rideshare services continued to grow in Sydney and Other Urban areas. As a result, satisfaction with rideshare in Sydney was substantially higher than for taxis, while in other urban areas satisfaction with taxis was only just slightly higher than for rideshare.

In 2022 satisfaction with taxi services in Sydney and other urban areas trended slightly upwards, and satisfaction with rideshare service slightly downwards. These declines for rideshare is the first time that satisfaction with available services has declined since the survey began measuring this – though satisfaction in both locations is still considerably higher than the 2017 baseline figures. Satisfaction with taxi services and with limousine and other hire vehicle services have not significantly changed over the five survey waves, but if anything are all slightly lower.

Figure 23: Change in satisfaction with point-to-point transport services Q7/10



B. Perceptions of Point-to-Point Transport Options

Strengths and Weaknesses

Customer perceptions of 11 dimensions are considered in the survey, which can be classified into two broad groups:

Practical dimensions	Quality dimensions
Convenience	Vehicle quality
Safety	Navigation and route knowledge
Availability	Driving skills
Waiting times	Driver presentation and attitude
Value for money	Customer service
Hygiene during COVID New in 2020	

Respondents are asked to rate each dimension as a 'strength', a 'weakness' or a 'neutral' characteristic of each type of transport. Over the following pages, charts show perceptions for each type of transport for each of the three locations. The figures reported are the 'differential' between the proportion of people who identified each dimension as a *strength* minus the proportion who identified it as a *weakness*.

There are broad consistencies in the way that taxis, rideshare and limousines / other hire vehicles have been perceived across the three survey locations, but there are some nuances. Both the macro patterns and the tone of the nuances have been consistent – suggesting that even though there has been substantial changes in the marketplace dynamics in recent years, perceptions of the fundamental characteristics and strengths of the transport services have not changed greatly.

The key consistencies seen are:

- Rideshare tends to be the leader in the practical dimensions. The major positive point of difference for rideshare is felt to be *value for money*, while *convenience*, *waiting times* and *availability* are also key competitive strengths. The least positive facets are largely driver-related, being *safety*, *driving skills* and *navigation*. In 2020, while *value for money* remains a very strong strength for rideshare, it did diminish somewhat.
- Limousines and other hire vehicles are seen as the leader in quality dimensions, seen as having relative strengths in terms of the 'quality' dimensions plus *safety*. They have a relative weakness in terms of *value*, and are lower in *availability*, *convenience* and *waiting times*.
- Taxis do not tend to have any clear points of differentiation as strengths, and they score particularly low for perceived *value for money*. They are the most likely to have *all* dimensions rated as a weakness. In 2022 the nett negative differential for *value for money* tended to become slightly less negative than in 2020. See Appendix C

Variations across the locations are described on the following pages. See appendix C for detailed charts showing strengths and weaknesses ratings.

On the new hygiene during COVID dimension introduced in 2020, limousines and other hire vehicles were rated highest, with rideshare rated higher than taxis in Sydney, but approximately equal in other locations.

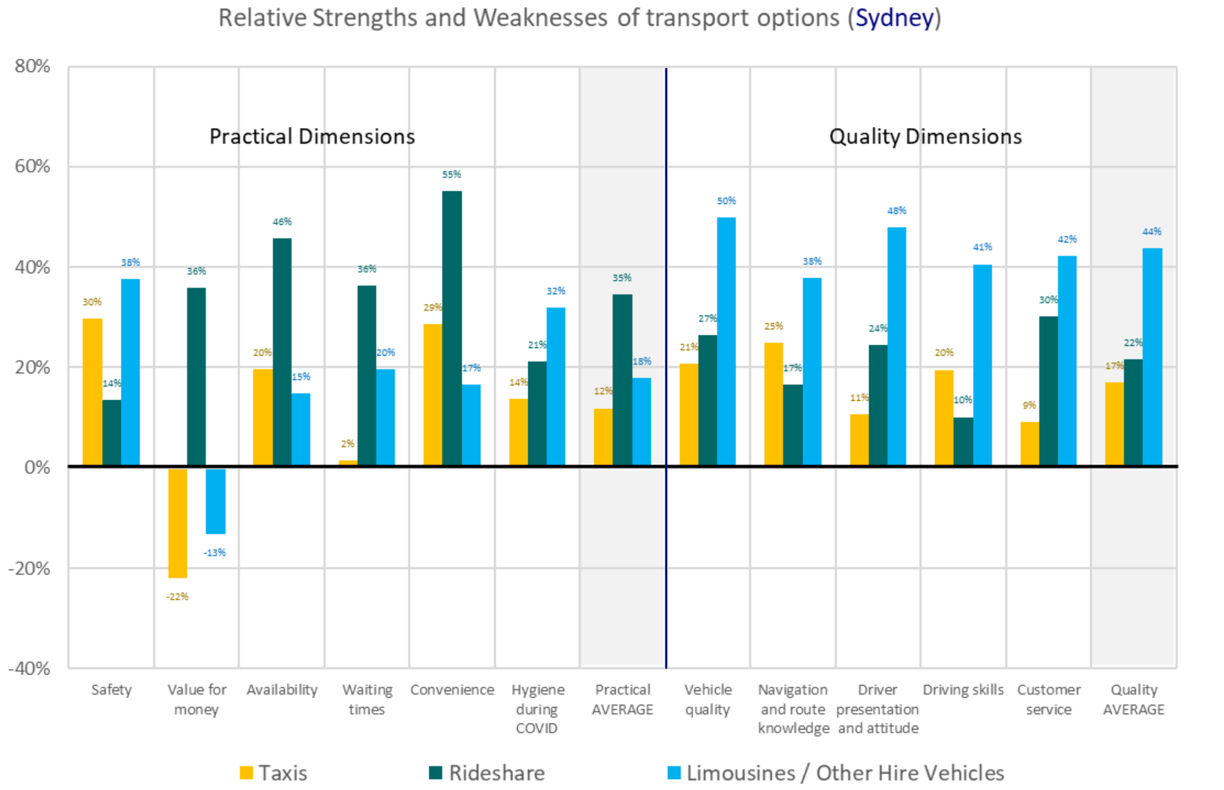
Perceptions of the three different types of services have been generally consistent across the years these items have been included in the survey. These charts show the **nett differential rating**, being the difference between the proportions who say each dimension is a strength minus those who say it is a weakness. A positive differential indicates more people think of the dimension as a strength, and a negative differential indicates more people think of a dimension as a weakness.

In Sydney, taxis typically have the lowest differential scores for a number of quality and practical dimensions, and the lowest overall average for both categories. The overall patterns continue, but with some subtle improvements compared to 2020. Taxis outrated rideshare in terms of the quality dimensions *navigation and route knowledge* and *driving skills* in 2022, and perceptions of *value for money* – while still strongly negative – were not *as* negative.

Rideshare retains its very strong positive differentiation on *value*, but it is somewhat less strong in 2022. It leads taxis on the other practical dimensions except for *safety*, and still scores a little higher on the new *hygiene during COVID* dimension. Rideshare doesn't match limousines and other hire vehicles on the quality dimensions, but is ahead of taxis for *vehicle quality, driver presentation and attitude* and especially *customer service*.

Broadly, rideshare scores highest across practical dimensions (with the exception of an apparent and persistent concern about *safety*), and is particularly positively differentiated in terms of *value*. Limousines and other hire vehicles have a clear and strong position on the 'quality' dimensions – and these macro patterns are all as per what has been seen in previous waves of the survey.

Figure 24: Strengths and weaknesses of transport options amongst those aware of the service in their region - Sydney Q64



Base = Respondents aware of service in location [Taxis n=2,003; Rideshare n=1,935; Limo / Other n=1,624]

Charts show 'differential' scores calculated as '% strength' minus '% weakness'

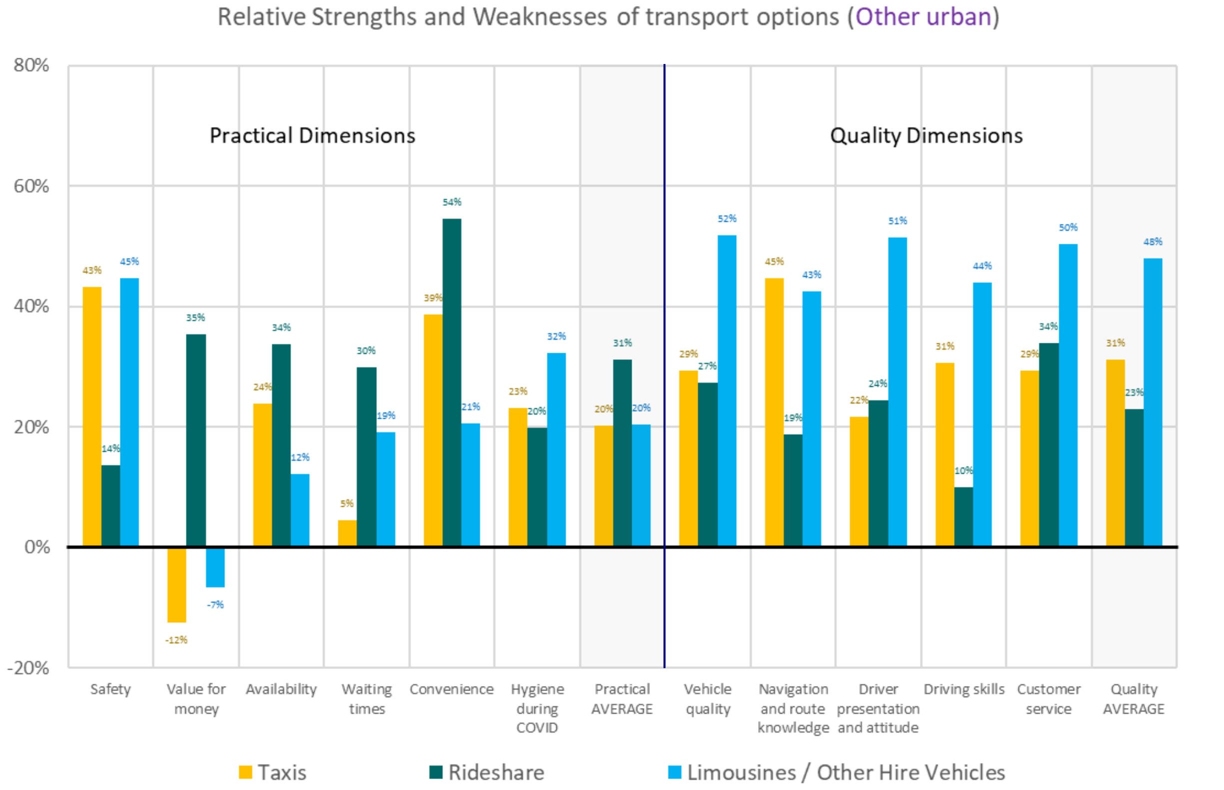
While there are some minor variations seen in other urban areas, overall the macro patterns are very similar to those that are seen in Sydney. Rideshare owns perceptions of *value,* and limousines and other hire vehicles own 'quality'.

Compared to Sydney, in other urban areas taxis are rated more positively on a number of dimensions. This is best summarised by the averages of both the practical and quality dimensions. The practical average for taxis in other urban areas is 20% (+1% on 2020) compared to 12% (+5%) in Sydney, and the quality average is 31% (unchanged) compared to 17% (+6%).

By comparison, the rideshare practical average is 31% in other urban areas (-3%) and 35% (-2%) in Sydney, and virtually identical for the quality average in other urban areas (23%) and Sydney (22%).

While the differentials between taxis and rideshare are not quite as high in other urban areas compared to Sydney, the overall pattern of relativities tells effectively the same story. However, while in both locations the practical average is considerably higher for rideshare than taxis, in other urban areas the quality average remains slightly higher for taxis than rideshare – reversing the pattern in Sydney.

Figure 25: Strengths and weaknesses of transport options amongst those aware of the service in their region - Other Urban Q64



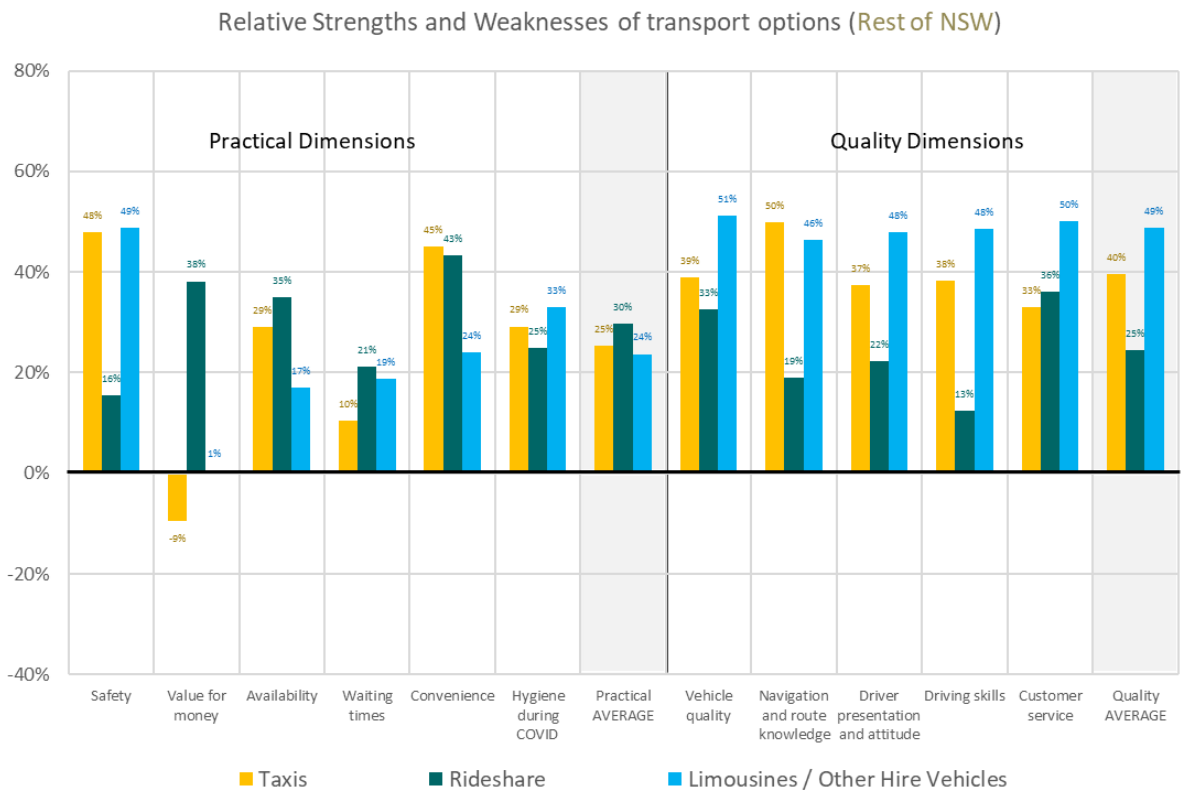
Base = Respondents aware of service in location [Taxis n=509; Rideshare n=420; Limo / Other n=388]

Charts show 'differential' scores calculated as '% strength' minus '% weakness'

In the rest of NSW though, there is quite a different dynamic which has been evident, and this pattern continues to hold in 2022.

In these areas, taxis are viewed more similarly to limousines and other hire vehicles, and equal or ahead of rideshare on most facets other than *value, waiting times* and *customer service.* This results in rideshare having only a small lead on practical average (due almost exclusively to its strength in perceived value), but both taxis and limousines and other hire vehicles having higher quality averages than rideshare.

Figure 26: Strengths and weaknesses of transport options amongst those aware of the service in their region - Rest of NSW Q64



Base = Respondents aware of service in location [Taxis n=371; Rideshare n=194; Limo / Other n=191]

Charts show 'differential' scores calculated as '% strength' minus '% weakness'

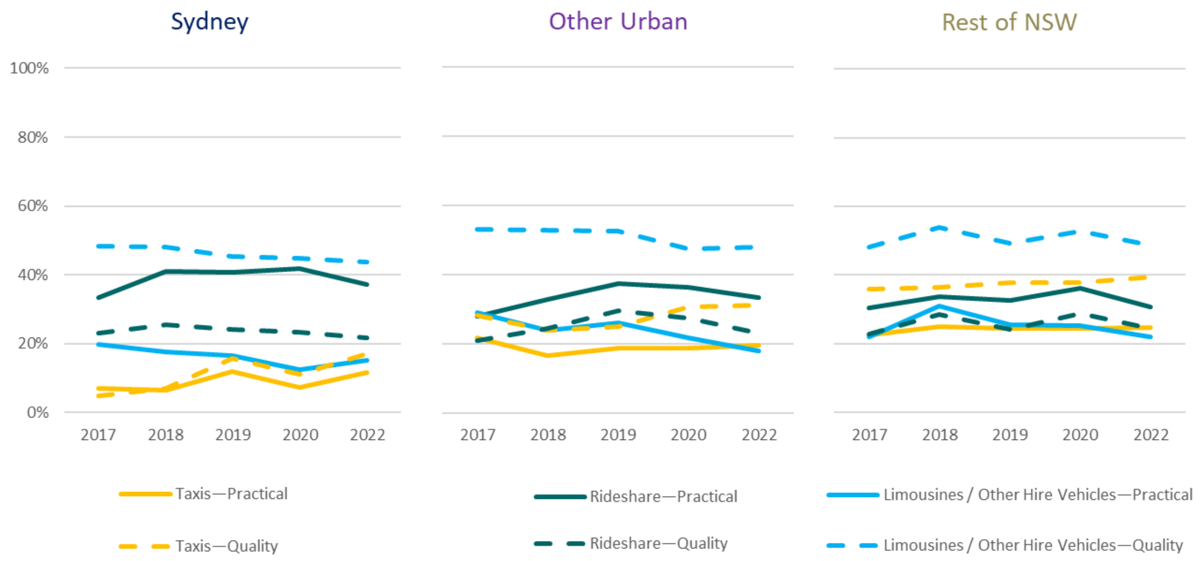
The tracking chart below shows the average of the practical dimensions and the quality dimensions for each area.

The macro patterns in these charts are:

- Rideshare consistently scores highest for practical dimensions, and higher than taxis on quality dimensions.
- Limousines and other hire vehicles score highest on the quality dimensions, but still generally higher than taxis on the practical dimensions.
- Taxis tend to score higher on quality than on practical dimensions – reversing the pattern of rideshare services on the two averages.

Perceptions of rideshare generally fell slightly in 2022, while perceptions of taxis generally rose a little since the previous survey.

Figure 27: Changes in perceived strengths and weaknesses of transport options amongst those aware of the service in their region (average Practical Dimensions and Quality Dimensions scores) Q64



Preferences

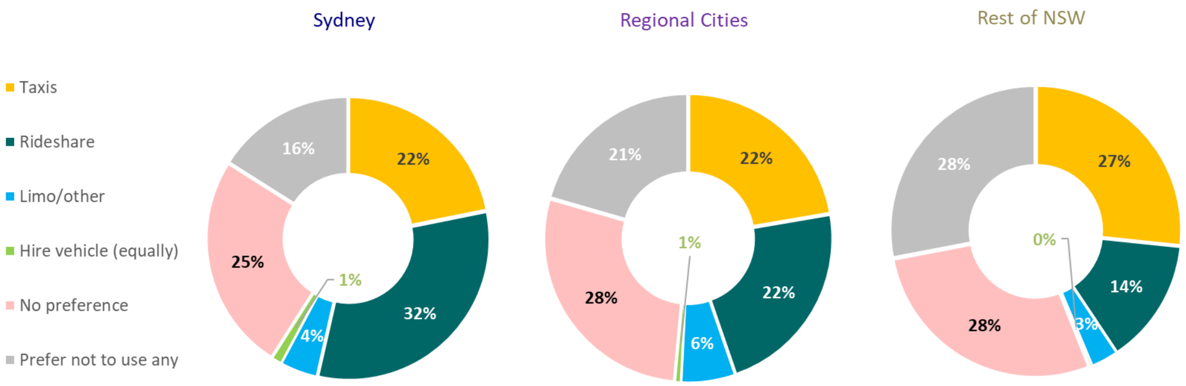
Preferred forms of transport do vary substantially across locations, but the trends that have been observed over the past few surveys were somewhat different in 2022.

- In Sydney, 37% of people expressed a preference for some form of hire vehicle (down slightly from 40-41% in the last two surveys), while 22% had a preference for taxis (up from 18% in 2020, but still lower than the 25% in 2019). As in recent years, the majority of the preference for hire vehicles is for rideshare (32%, down from 36% in 2020).

- In Other Urban areas the proportion preferring taxis continues to decline slowly, and is now at 22% compared to 27% back in 2017. The proportion preferring hire vehicles had increased from 18% in 2017 to 31% in 2020, but was 29% in 2022. As in Sydney, the preference for hire vehicles is mostly for rideshare, but also this proportion declined for the first time, from 26% to 22% (though still much higher than the 9% seen in 2017). Rideshare and taxis have had very similar levels of preference for the last three surveys in other urban areas.

- In the rest of NSW there remains a strong preference for taxis (27%, bouncing back from a low of 25% in 2020). 14% had a preference for rideshare, a figure that has been fairly steady for several surveys.

Figure 28: Preferences for transport options Q65/66



Base = all respondents [Sydney n=2,070; Other Urban n=541; Rest of NSW n=412]

Preferred form of point-to-point transport	**Sydney**	**Other Urban**	**Rest of NSW**
Sample size	*2095*	*522*	*446*
Taxis	**22%**	**22%**	**27%**
Rideshare	32%	22%	14%
Limousine / Other hire vehicle	4%	6%	3%
Hire Vehicle (equally)	1%	1%	0%
Any form of Hire Vehicle	**37%**	**29%**	**17%**
No preference	25%	28%	28%
Prefer not to use any	16%	21%	28%

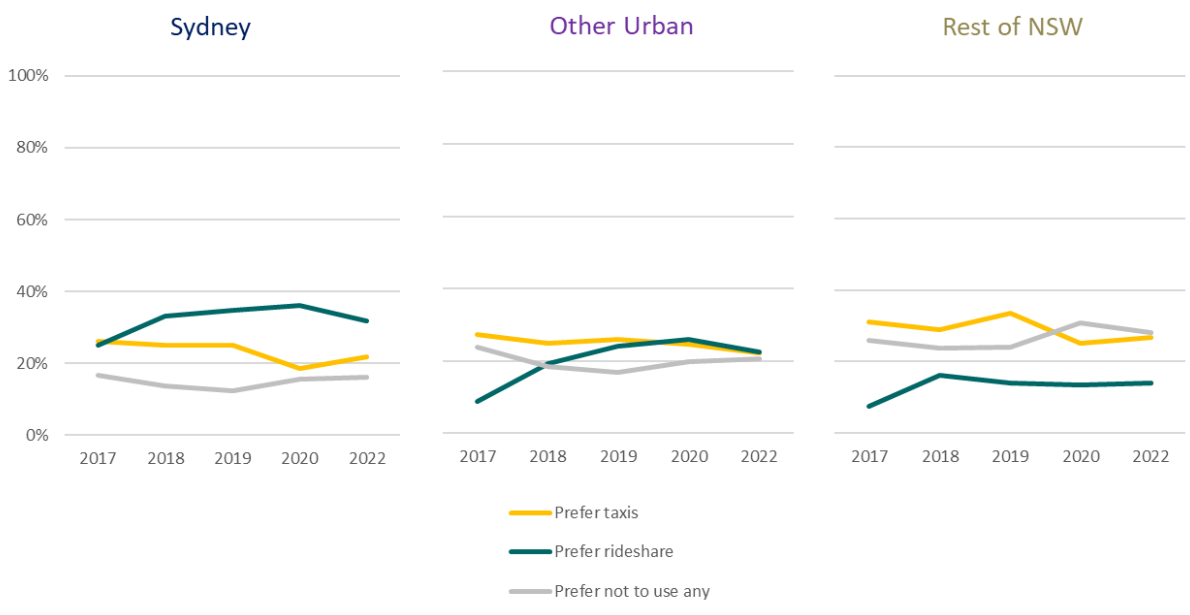
Consistent with other trends in awareness and usage in the survey, the tracking charts here show preferences for rideshare increasing in Sydney and other urban areas from 2017 to 2020, though slowing in 2020 – and then even falling back slightly in the 2022 survey.

In the 2020 survey both general results and preferences specifically fell more so for taxis than they did for rideshare – but in 2022 the survey results for taxis have bounced back a little.

The macro patterns that have developed over the last five surveys remain present though. Rideshare is now more preferred in Sydney than taxis, while the preference for taxis remains in the rest of NSW areas. In other urban areas preferences for rideshare have virtually mirrored those for taxis since 2019.

The charts here also show those who prefer not to use *any* forms of point-to-point transport. This had shown a slight downwards movement from 2017 to 2019, suggesting that the collective range of point-to-point transport options available may have been appealing to a wider proportion of the community (ie: so that fewer had a preference to avoid point-to-point transport at all where possible). In all locations this proportion was somewhat higher again during the last two COVID-affected survey periods. If the next 12 months do see a return to more pre-COVID lifestyle patterns, it will be interesting to see whether the previous trend to fewer people having a preference to avoid point-to-point transport returns.

Figure 29: Changes in preferences for transport options Q65/66

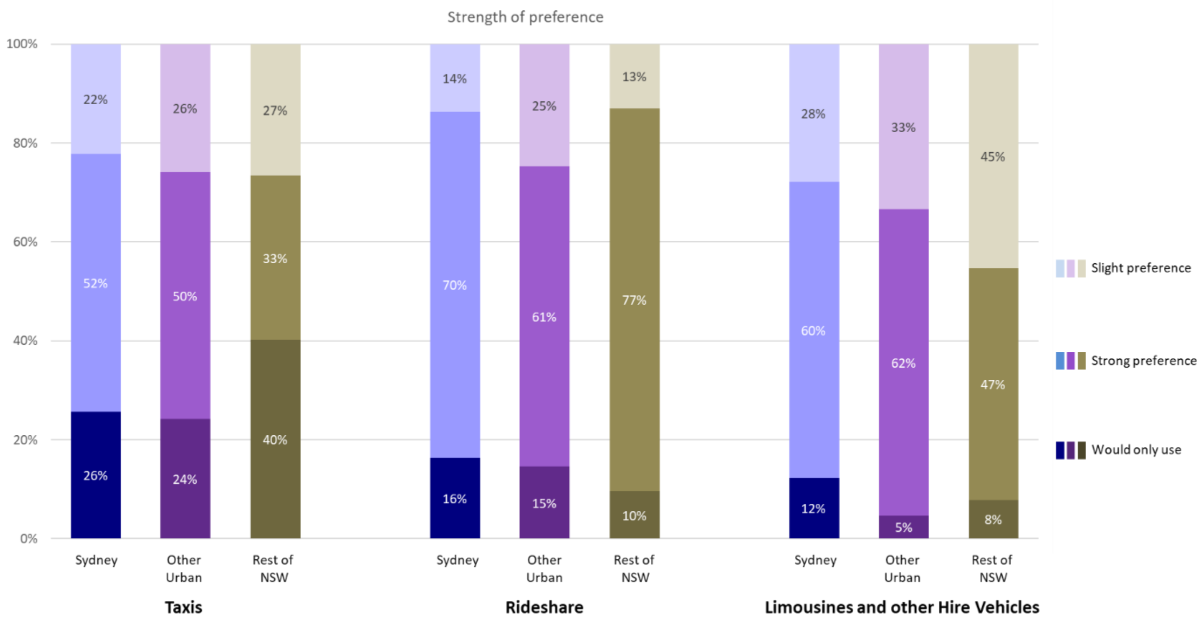


Strength of preference

There are generally slightly different patterns seen in the strength of preferences for taxis and rideshare, and these continue to be apparent within the groups who have different preferences, even as the size of those groups changes.

People who have a preference for rideshare are more likely to describe this as *a strong preference* than are those who have a preference for taxis. Those who have a preference for using taxis are more likely to say they *will only use taxis*, but are also more likely to say they have only a *slight preference*.

Figure 30: Strength of preference for transport options amongst those who have a preference for one of taxis, rideshare or limousines / other hire vehicles Q67



Base = Have preference for taxis, rideshare or limos / other HVs [Sydney n=120-619; Other Urban n=42-131; Rest of NSW n=16-118]
Note small base size for limousines / other HV in rest of NSW.

Proportion of all respondents represented in chart: Sydney = 59%; Other Urban = 51%; Rest of NSW = 44% - the balance have no preference, or prefer not to use any of these forms of transport

Changes that May Increase Use

There have been no substantive changes in the type of changes respondents felt might make them likely to use point-to-point transport services more often, with responses very stable across all waves of the survey.

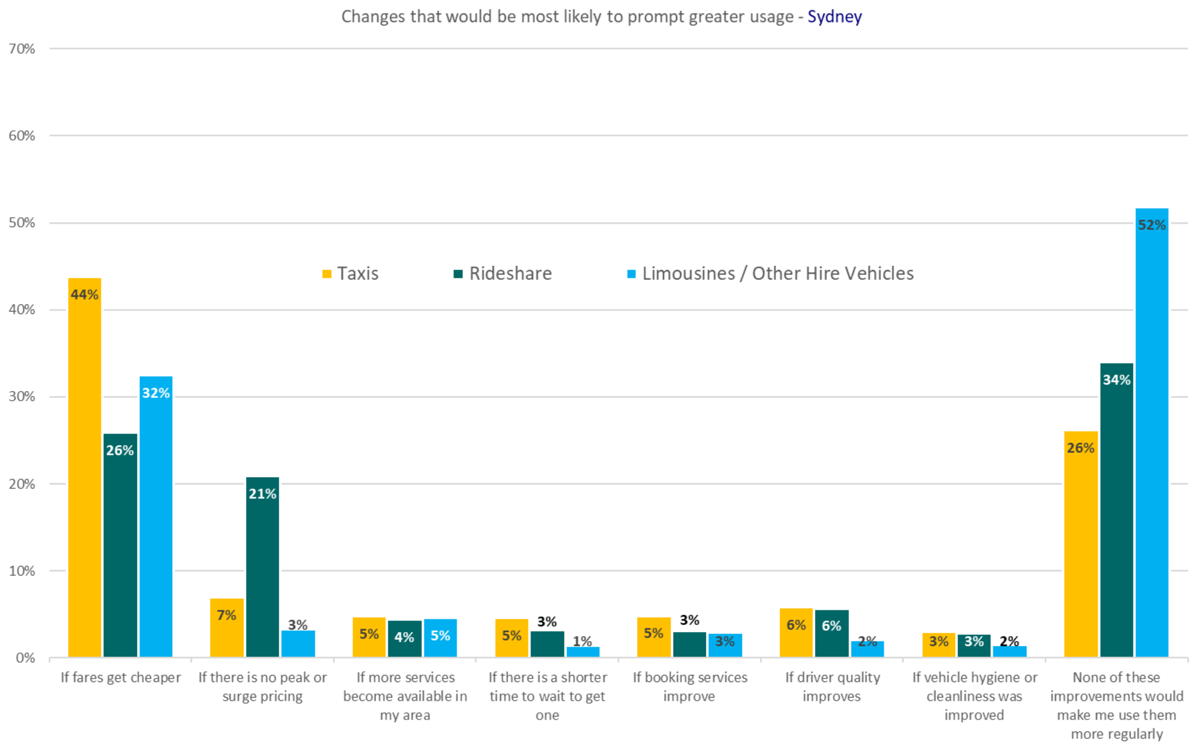
26%-51% of respondents across the different regions in 2022 said that nothing would get them to use taxis more often, with the equivalent figures for rideshare being 10%-11% higher, and higher again for limousines and other hire vehicles. For each type of service, willingness to consider increasing usage remains highest in Sydney and lowest in the Rest of NSW. These patterns and results are very consistent with the 2020 and earlier results.

Given the stability, factors relating to cost remain those considered by users the most likely to prompt increased usage of any of the types of point-to-point transport.

Cost (or value) is a key factor on which rideshare seems differentiated from taxis across the survey, and that strongly comes through in this result too. In all areas by far the single most commonly identified change which may prompt greater usage was *if fares get cheaper*, and this remains an especially dominant and singular factor for taxis.

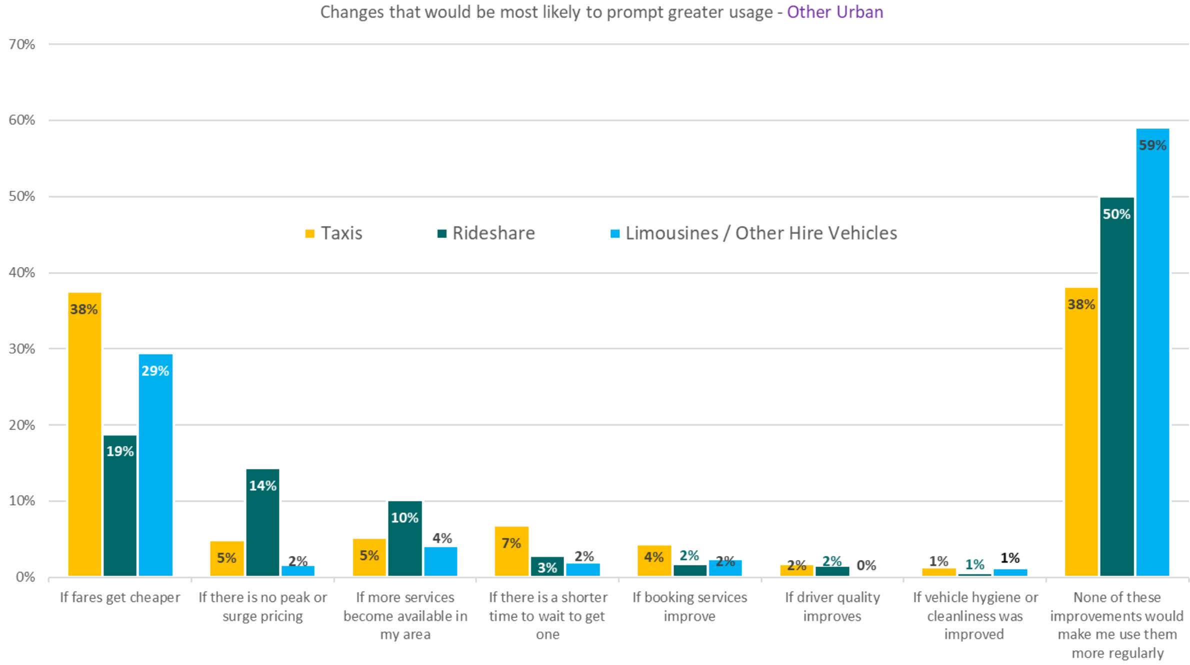
For rideshare services *surge or peak pricing* is also identified as barrier in Sydney and Other Urban areas. *Availability* of rideshare services remains a barrier in other urban areas and the Rest of NSW.

Figure 31: Changes which may prompt greater use of transport services – Sydney Q68



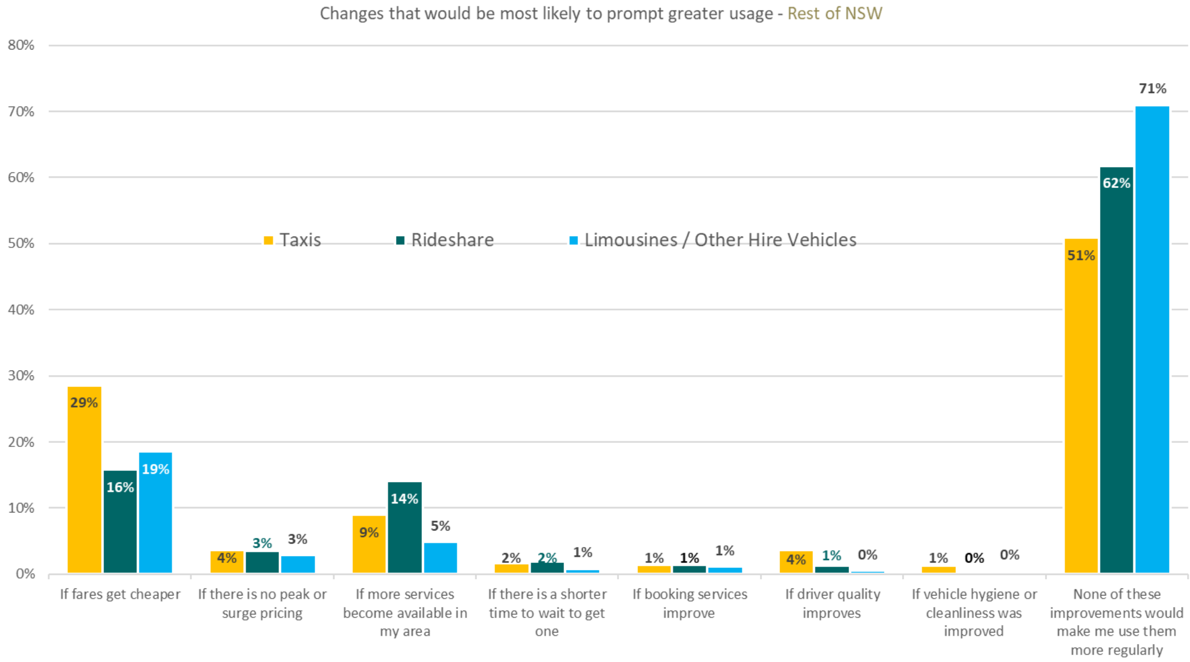
Base = All respondents [Sydney n=2,070]

Figure 32: Changes which may prompt greater use of transport services – Other Urban Q68



Base = All respondents [Other Urban n=541]

Figure 33: Changes which may prompt greater use of transport services – Rest of NSW Q68



Base = All respondents [Rest of NSW n=412]

C. Perceived Value for Money

As in previous years, rideshare is seen as offering considerably better value for money than taxis, with limousines and other hire vehicles unsurprisingly least likely to be rated as *good or ok* value. Higher proportions of respondents in Sydney rate the value of rideshare as *good or ok* compared to taxis, but similar proportions do so in other urban areas and the rest of NSW. However, even in these areas, greater proportions rate the value of taxis as *poor* compared to rideshare.

The pattern of green and pink shading in the 2022 table suggests that respondents are less positive about the value of rideshare compared to at the time of the 2020 survey, but somewhat more positive about the value of taxis.

Figure 34: Summary of perceptions of value for money by time of trip amongst those aware of the service in their region Q20/21

		Taxis			Rideshare			Limousines or other hire vehicles		
		Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
	Sample size	*2003*	*509*	*371*	*1935*	*420*	*194*	*1624*	*388*	*191*
Overall	**Good + OK**	**50%**	**49%**	**52%**	**65%**	**52%**	**55%**	**33%**	**39%**	**42%**
	Poor	35%	21%	21%	10%	8%	7%	16%	13%	15%
	Differential	*16%*	*28%*	*31%*	*54%*	*44%*	*48%*	*17%*	*26%*	*28%*
During the day, and before 10pm	**Good + OK**	**50%**	**48%**	**49%**	**61%**	**51%**	**51%**	**30%**	**39%**	**37%**
	Poor	30%	17%	19%	10%	7%	8%	16%	11%	14%
	Differential	*20%*	*30%*	*31%*	*51%*	*44%*	*43%*	*14%*	*28%*	*24%*
After 10pm - Sunday to Thursday	**Good + OK**	**36%**	**29%**	**35%**	**47%**	**36%**	**42%**	**25%**	**27%**	**33%**
	Poor	33%	25%	23%	18%	16%	13%	16%	12%	13%
	Differential	*3%*	*4%*	*12%*	*30%*	*20%*	*29%*	*9%*	*16%*	*20%*
After 10pm - Friday and Saturday	**Good + OK**	**34%**	**28%**	**34%**	**43%**	**31%**	**40%**	**25%**	**26%**	**34%**
	Poor	36%	28%	25%	23%	21%	16%	16%	13%	14%
	Differential	*-3%*	*0%*	*9%*	*20%*	*10%*	*23%*	*9%*	*13%*	*20%*
For short trips (under 5km)	**Good + OK**	**51%**	**46%**	**51%**	**60%**	**47%**	**47%**	**25%**	**26%**	**30%**
	Poor	33%	25%	20%	14%	10%	12%	21%	17%	20%
	Differential	*17%*	*21%*	*31%*	*47%*	*36%*	*35%*	*4%*	*9%*	*9%*
For long distances (over 15km)	**Good + OK**	**40%**	**33%**	**33%**	**57%**	**40%**	**45%**	**29%**	**36%**	**36%**
	Poor	41%	29%	31%	15%	14%	12%	18%	13%	15%
	Differential	*-1%*	*4%*	*2%*	*41%*	*27%*	*33%*	*11%*	*23%*	*20%*

* **Differential = % (good + OK) minus % (poor). The higher the differential, the better the perceived value.**

Note: differentials are based on results to one decimal place, and may look different to the rounded whole numbers shown in the table

Cells highlighted green are >5% more positive in 2022 compared to 2020. Cells highlighted pink are >5% less positive in 2022.

ORIMA

In Sydney

Figure 35: Perceptions of value for money by time of trip amongst those aware of the service in their region (Sydney) Q20

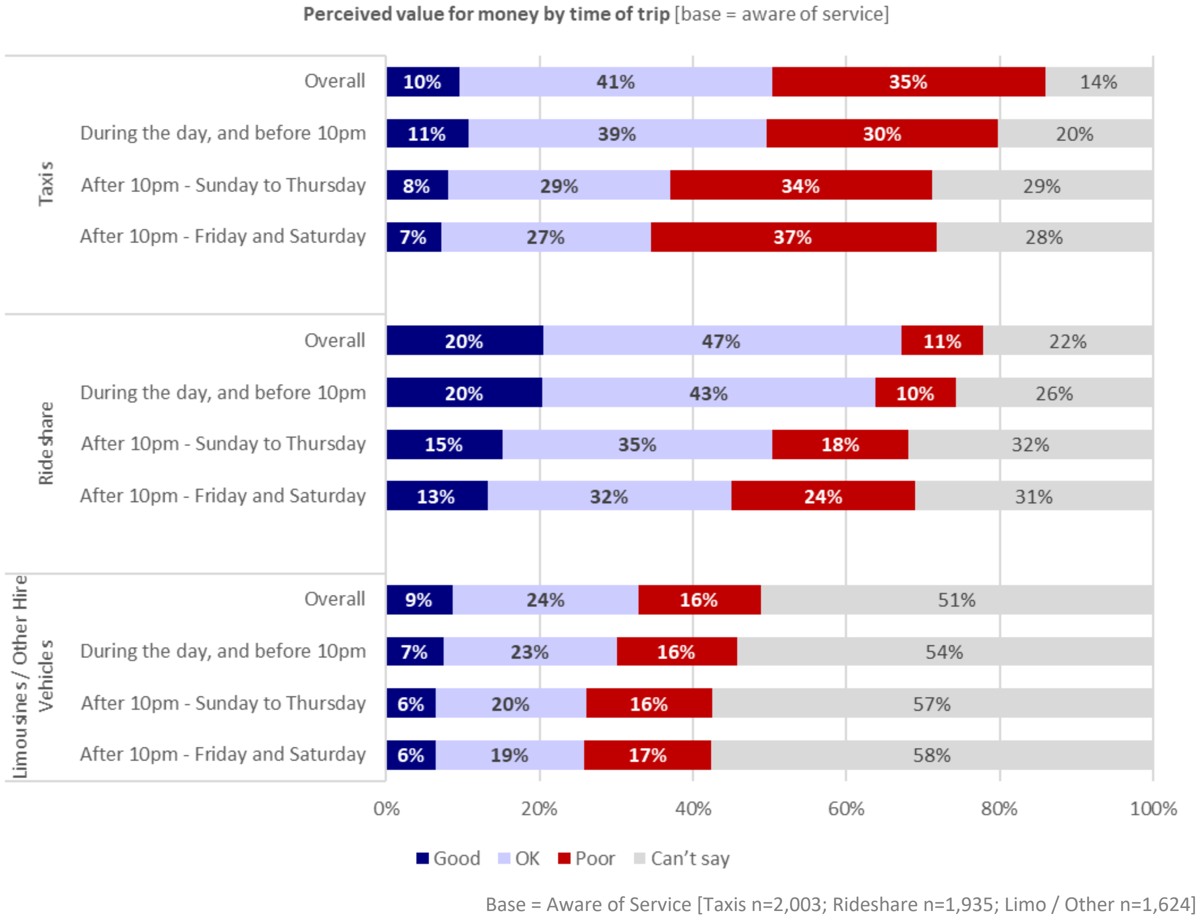
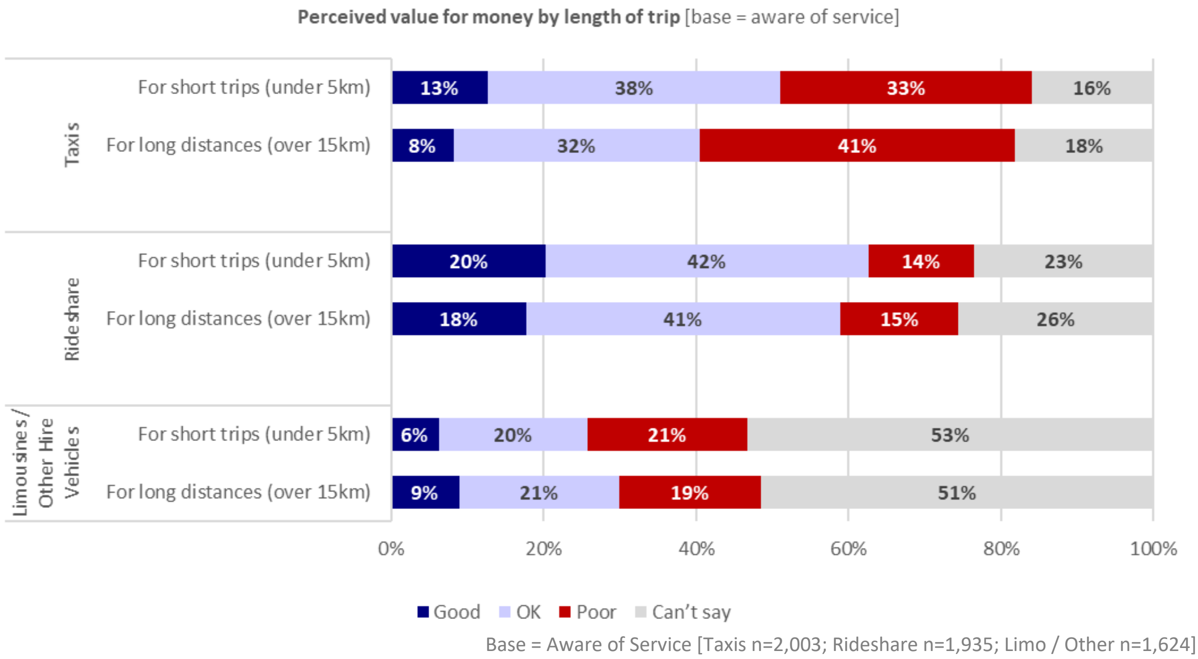


Figure 36: Perceptions of value for money by length of trip amongst those aware of the service in their region (Sydney) Q21



In Other Urban

Figure 37: Perceptions of value for money by time of trip amongst those aware of the service in their region (Other Urban) Q20

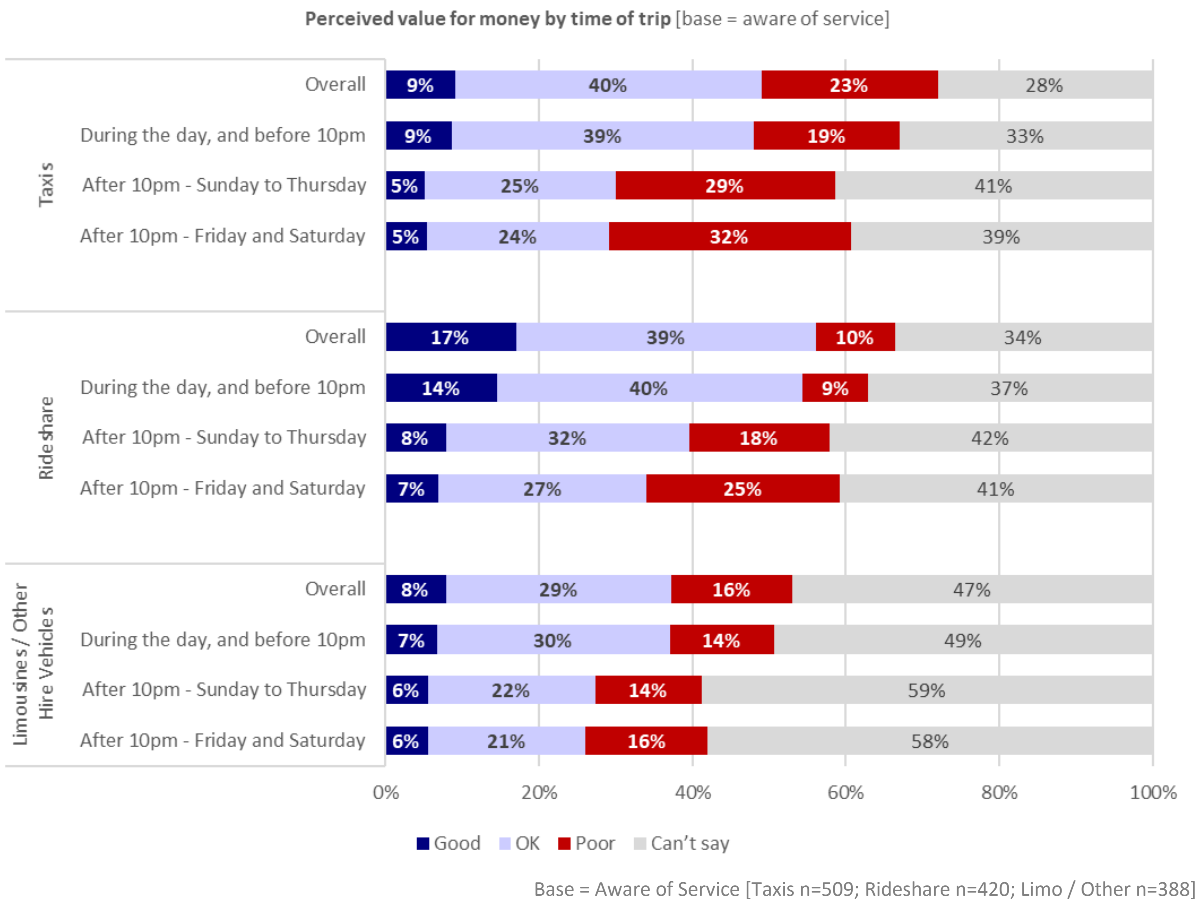
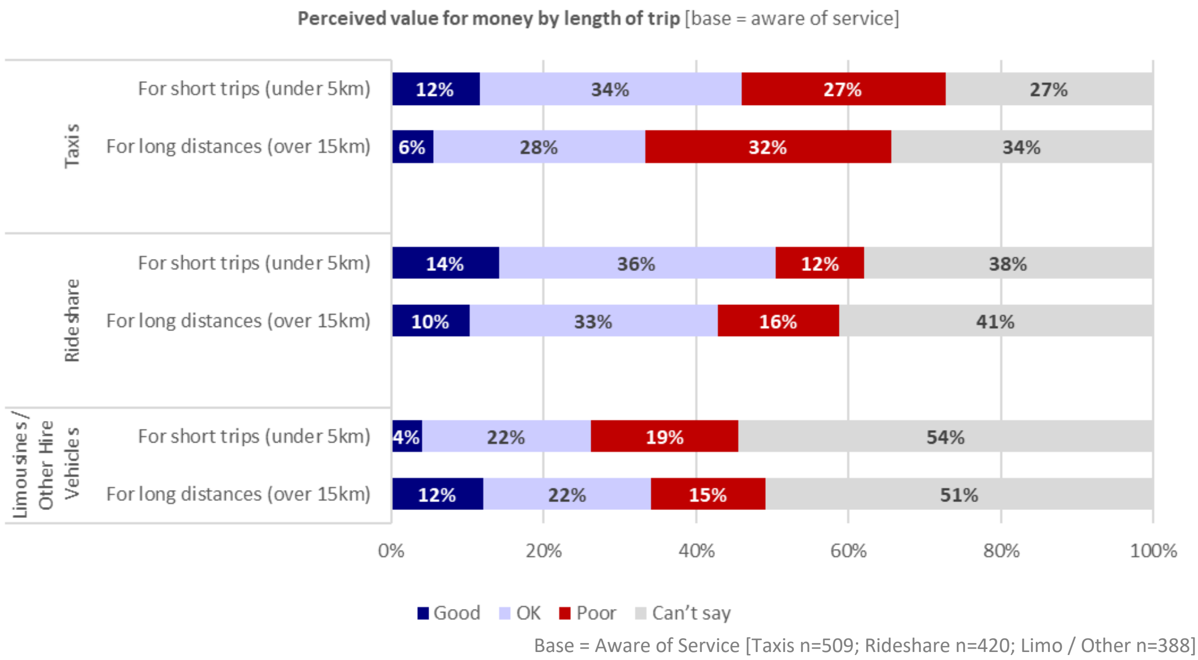
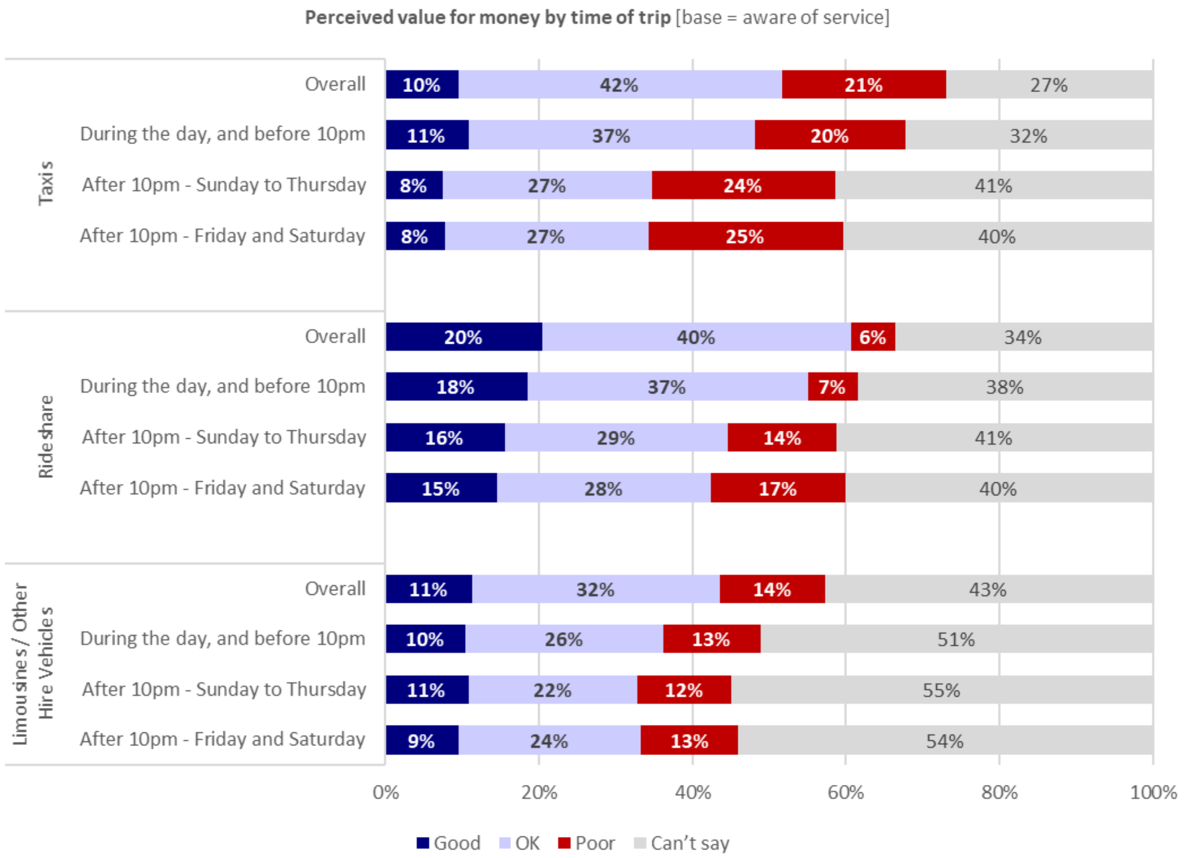


Figure 38: Perceptions of value for money by length of trip amongst those aware of the service in their region (Other Urban) Q21



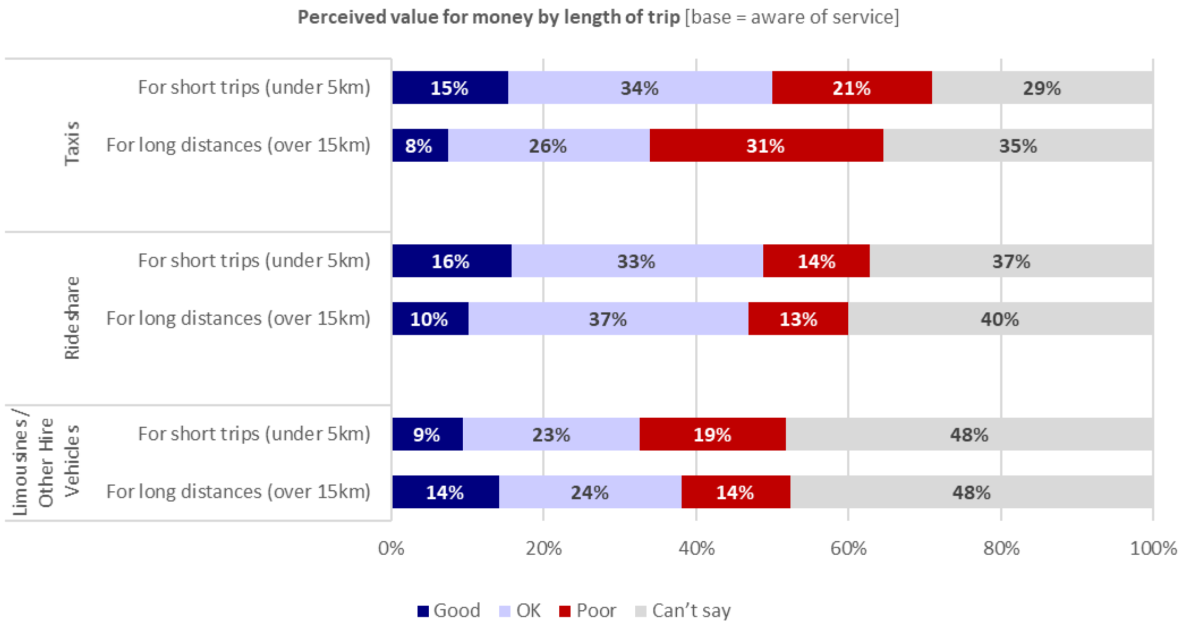
In the Rest of NSW

Figure 39: Perceptions of value for money by time of trip amongst those aware of the service in their region (Rest of NSW) [Q20]



Base = Aware of Service [Taxis n=371; Rideshare n=194; Limo / Other n=191]

Figure 40: Perceptions of value for money by length of trip amongst those aware of the service in their region (Rest of NSW) [Q21]



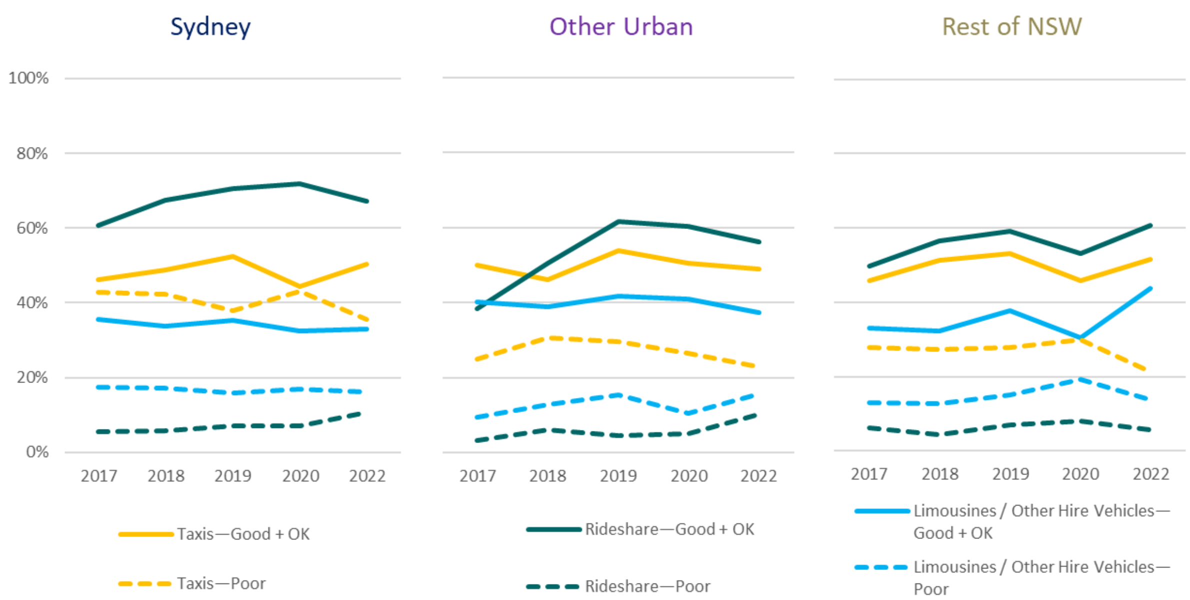
Base = Aware of Service [Taxis n=371; Rideshare n=194; Limo / Other n=191]

The tracking chart shows change in perceptions of overall value over time. This clearly shows the upwards perceptions of value associated with rideshare from 2017 to 2019 in the slope of the three solid dark green lines. This has been most apparent in the other urban areas, where awareness and use also climbed the most steeply in that time. In 2020 the perceived value of rideshare flattened off and even fell in the rest of NSW region. In Sydney and the other urban areas tracking charts, the decline in perceived value of rideshare in 2022 can be clearly seen.

Perceived value of taxis also tended to increase slightly from 2017-2019, though not to the same extent. In 2020 the perceived value of taxis fell in all locations – but bounced back in Sydney and the rest of NSW.

These tracking charts also show that the bigger difference in perceived value between rideshare and taxis lies not so much in the proportions who consider each to be *good / OK* value (though rideshare is consistently higher on these ratings), but more so in the much higher proportions who consider taxis to be *poor* value.

Figure 41: Change in perceptions of OVERALL value for money amongst those aware of the service in their region Q20



Impact of Minimum Rank & Hail Fares

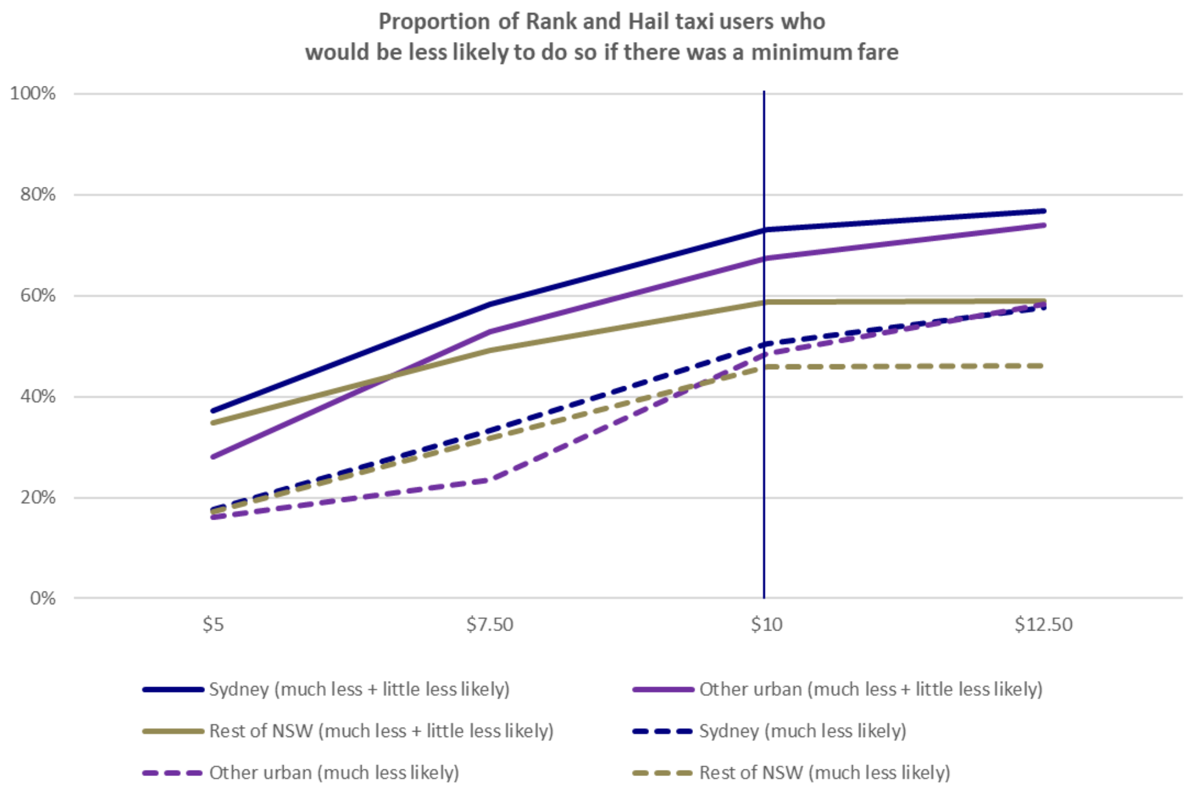
The overall sensitivity of those who use rank and hail taxis to a minimum fare has not changed substantively across the four surveys where these questions have been asked, but there are some nuances in each year.

In 2020 the rest of NSW region was the most sensitive and other urban areas the least sensitive to the concept of minimum fares. In 2022 though, the rest of NSW was the *least* sensitive, and Sydney respondents were by a small margin the most sensitive.

Likely decline in use of rank and hail taxis still peaks at around 70-80% of users saying they would feel less likely to use them if there was a minimum fare in the $10 - $12.50 range.

As noted in previous reports, survey responses about anticipated behaviour changes as a result of hypothetical scenarios should be treated indicatively rather than as a quantitative predictor of the magnitude of any change. However, the patterns can show how respondents view different levels of changes and identify sensitivities, and these questions have shown that respondents have a fairly consistent view of how they expect that minimum fares may impact their use of rank and hail taxis.

Figure 42: Likely impact of a minimum fare on use of Rank and Hail taxi users Q27



Base = Used or tried to use rank and hail taxis within the last 6 months [Sydney n=432; Other Urban n=35; Rest of NSW n=35]

D. Methods of Obtaining Transport Services

The *relative patterns* in ways respondents report getting point-to-point transport services have remained quite consistent across the 2017-2022 surveys, but the absolute magnitudes have changed.

- In Sydney in 2022 all four methods of obtaining taxis are still approximately equally prevalent, but outside of Sydney ASAP bookings are by far the most common method used.
- Rideshare services are most commonly obtained by ASAP bookings.
- Limousines and other hire vehicles are most commonly pre-booked, rather than ASAP bookings.

Figure 43: Prevalence of methods of obtaining transport in the population Q22

Base = all respondents [Sydney n=2,070; Other Urban n=541; Rest of NSW n=412]

% of population		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	11%	6%	6%
	ASAP booked	14%	**15%**	**13%**
	Rank	14%	6%	7%
	Hail	13%	2%	3%
Rideshare	Pre-booked	15%	8%	6%
	ASAP booked	**36%**	**21%**	**10%**
Limousines and other hire vehicles	Pre-booked	**6%**	**4%**	2%
	ASAP booked	2%	1%	3%

Figure 44: Prevalence of methods of obtaining transport amongst recent users Q22

Base = Used transport type within the last 6 months [Sydney n=112-882; Other Urban n=28-118; Rest of NSW n=17-89]

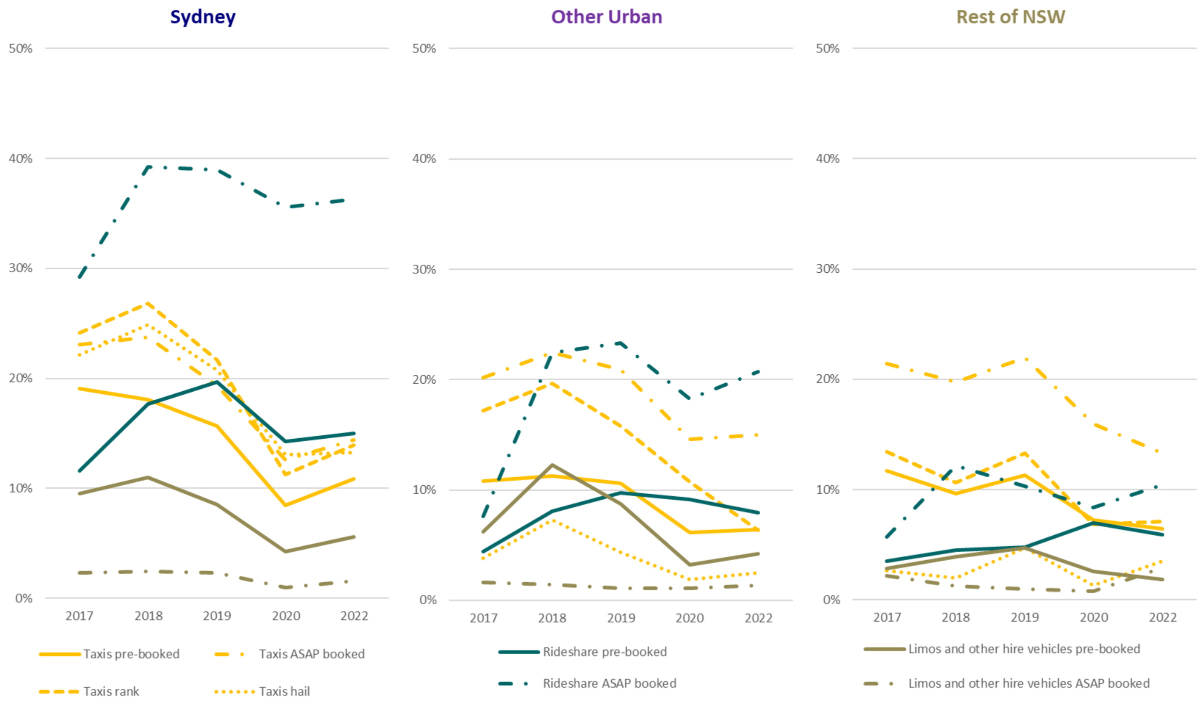
% of users (last 6 months)		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	31%	30%	33%
	ASAP booked	41%	**70%**	**68%**
	Rank	40%	30%	36%
	Hail	38%	12%	18%
Rideshare	Pre-booked	33%	32%	41%
	ASAP booked	**79%**	**84%**	**71%**
Limousines and other hire vehicles	Pre-booked	**79%**	84%	39%
	ASAP booked	23%	26%	61%

The tracking charts here show the changes in the prevalence of each of these different methods of obtaining point-to-point transport in the population – but the shape of the curves for the different methods used for each type of transport show how it is the absolute levels of use that is changing, not the relative prevalence of different methods of obtaining transport.

The green lines show the rapid increase in use of rideshare, at least through to 2019 before COVID arrived. The differences between the dotted line for ASAP bookings versus the solid lines for pre-bookings show the preference for ASAP bookings for rideshare.

By comparison, the yellow lines show the decline in overall use of taxis has been spread approximately equally across all the different ways that they can be obtained. If anything the decline in the use of ranks is slightly greater, but only to a small extent.

Figure 45: Changes in prevalence of methods of obtaining transport in the population [Q22]



Waiting Times

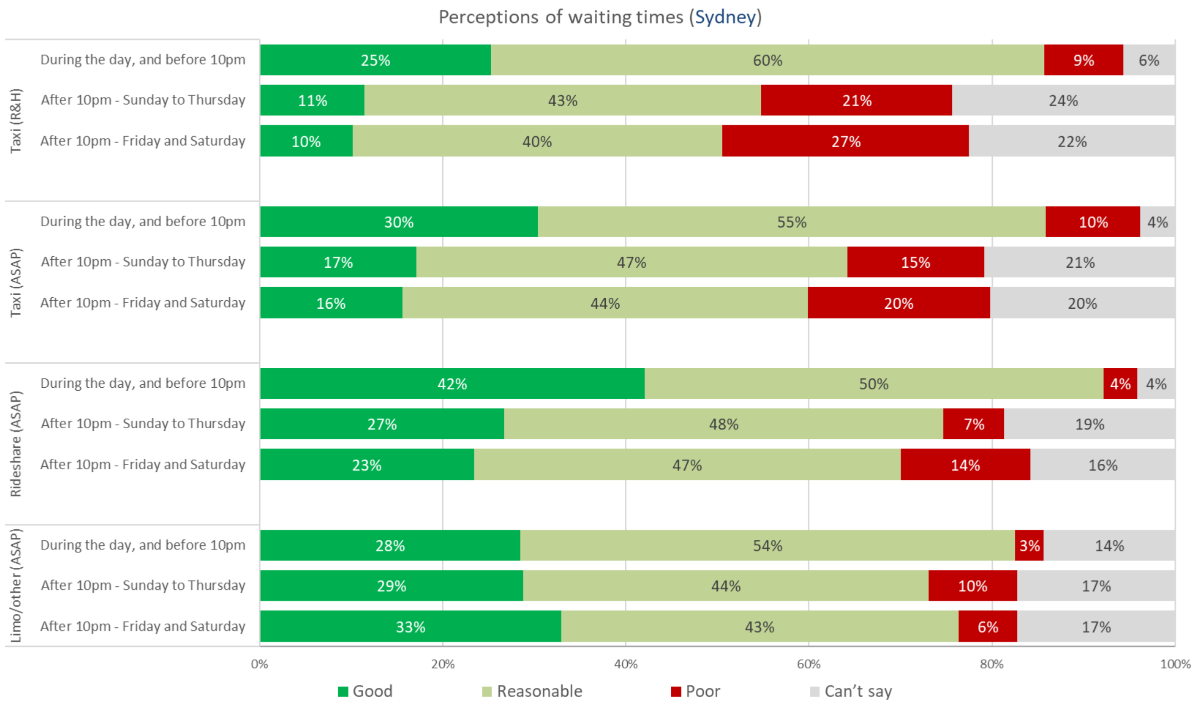
As might be expected, perceived waiting times are typically somewhat poorer in peak periods after 10pm, across all transport types and locations.

Before 2020 there was little difference in perceptions of waiting times after 10pm on Sunday-Thursday or on Friday-Saturday. In 2020 though, other than for rank and hail taxis, respondents perceived that waiting times were worse again on Friday and Saturdays than during off-peak periods, especially outside of Sydney. In 2022 this pattern is seen even more strongly, and in Sydney as well as outside of Sydney.

There are several other general observations about waiting times which have been consistently seen:

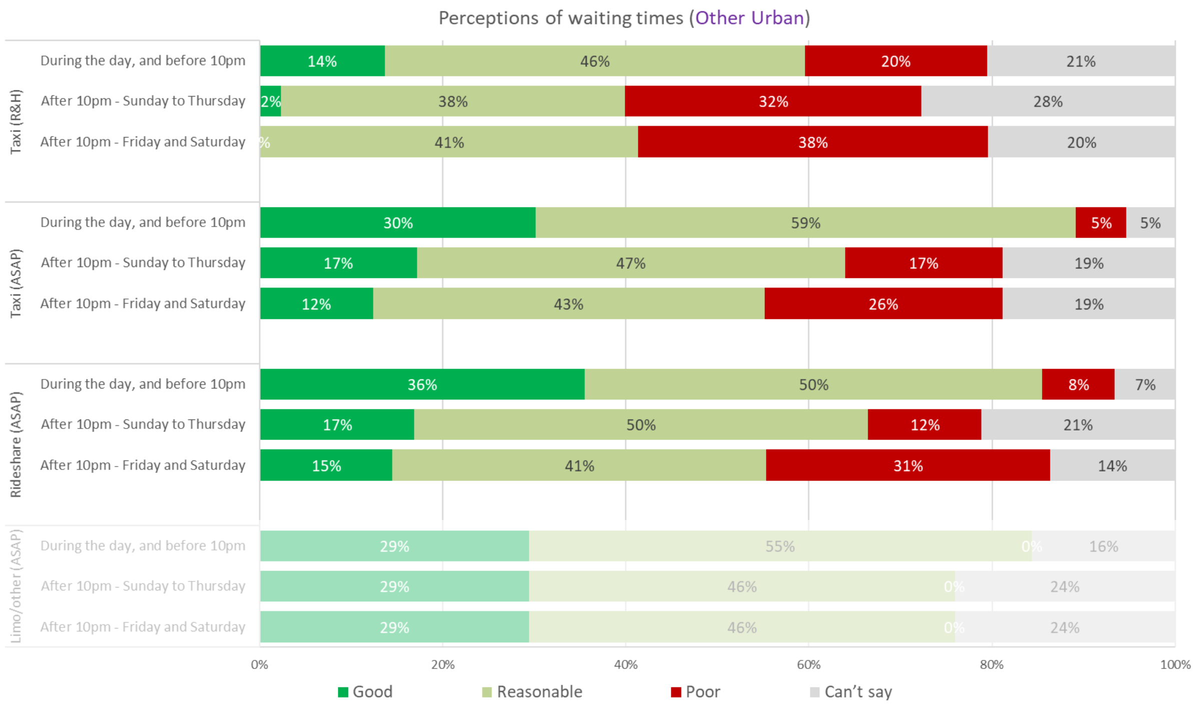
- Rideshare waiting times continue to be viewed more favourably than taxi waiting times.
- There is little perceived distinction between rank and hail taxi waiting times and ASAP booking waiting times – but if anything waiting times for ASAP bookings are felt to be a little better than rank and hail.
- Perceptions of waiting times are more similar than dissimilar across locations.

Figure 46: User perceptions of waiting times (Sydney) Q23-26



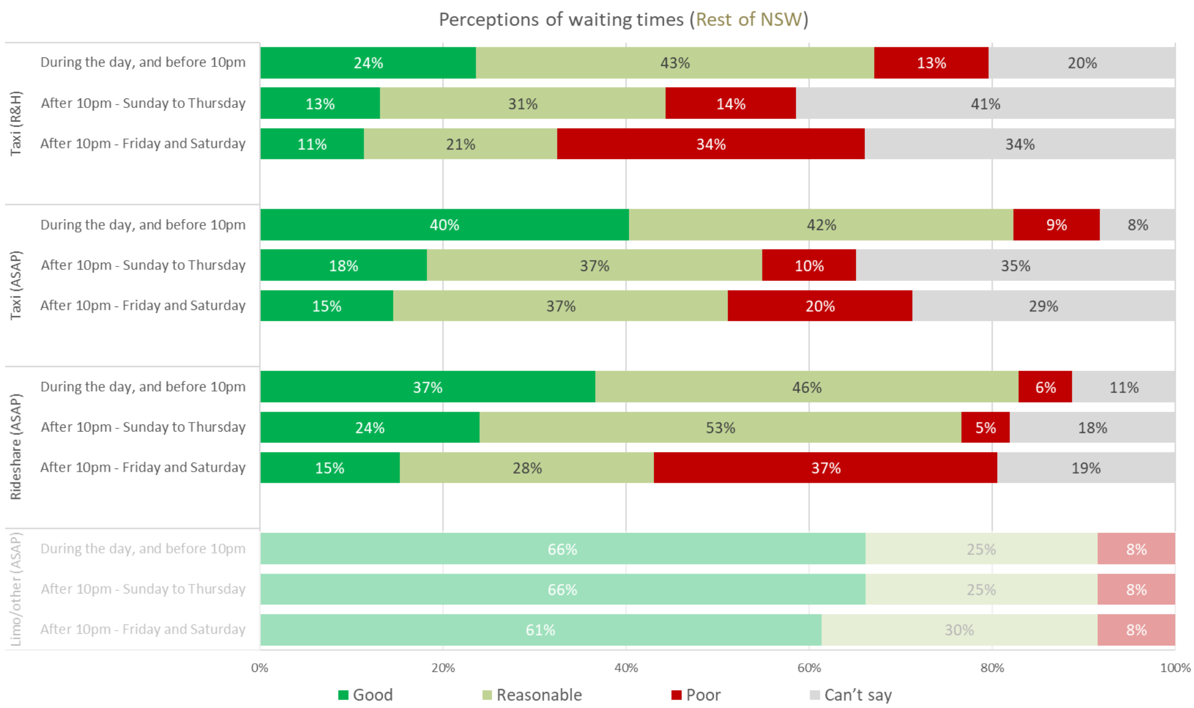
Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=432; Taxi ASAP n=293; Rideshare ASAP n=704; Limo / Other ASAP n=31]

Figure 47: User perceptions of waiting times (Other Urban) Q23-26



Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=35; Taxi ASAP n=76; Rideshare ASAP n=98; Limo / Other ASAP n=6*]

Figure 48: User perceptions of waiting times (Rest of NSW) Q23-26

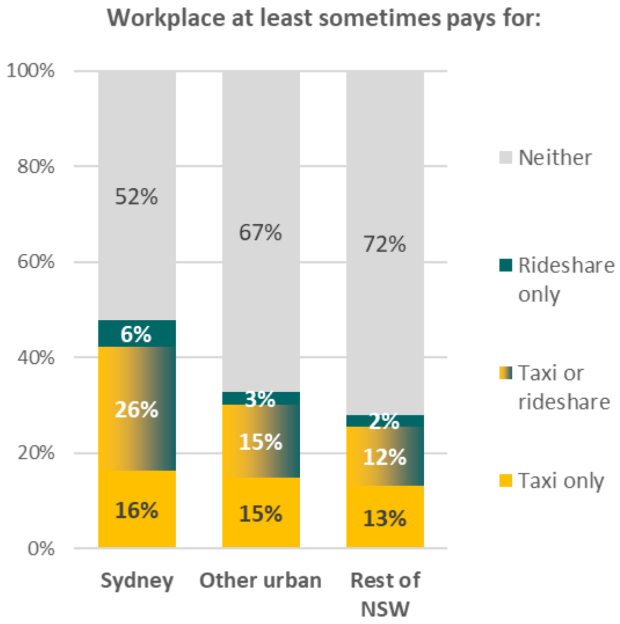


Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=35; Taxi ASAP n=61; Rideshare ASAP n=37; Limo / Other ASAP n=8*]

* Results from sample sizes below n=30 are greyed out and should be interpreted with caution

E. Workplace Policies

Figure 49: Workplace paying for transport Q32



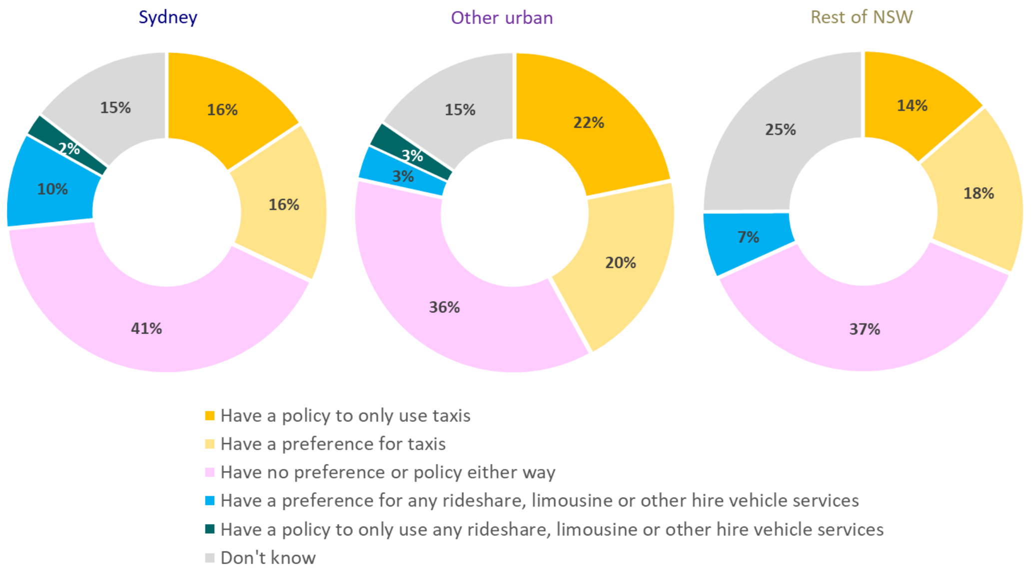
Just under half of all employed Sydney respondents (48%) said that their employer at least sometimes pays for employees to use point-to-point transport (this figure has been between 49% and 54% for the past four surveys). These proportions are usually considerably lower in the other locations, with the lowest recorded in 2022 being the rest of NSW (28%).

Where employers *did* pay for transport, as in previous years almost all at least sometimes pay for taxis – either only taxis or in combination with rideshare.

Very few employers pay for rideshare use only, and not taxis (just 2%-6%, and not significantly increasing). Much larger proportions pay for taxis only (13%-16% - and also not substantively changing over the survey timeframe).

Employers are still more likely to have a policy or a preference to use taxis than rideshare, where a preference or policy is known to exist. There have been no substantive changes in the past three surveys. The rest of NSW result fluctuates the most, but this variation is likely more due to the small sample sizes involved, and there is no clear year-on-year pattern in these variations.

Figure 50: Workplace policies and preferences on paying for transport Q34



Base = Workplace at least sometimes pays for transport [Sydney n=645; Other Urban n=93; Rest of NSW n=58]

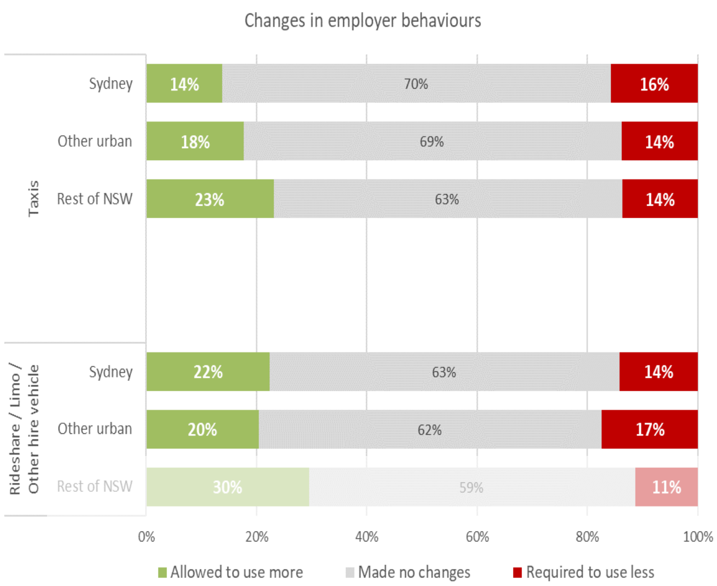
Employer policies may result in a small number of respondents using taxis for work purposes despite having a personal preference for using rideshare. Across all locations 3-6% of employed respondents had a preference for rideshare, but an employer who only paid for employees to use taxis. No more than 1% had a preference for taxis, but an employer who only paid for hire vehicles.

Change in employer behaviours

While respondents perceive that their employers are more likely to pay for employees to use taxis than 'hire vehicles'[2], and to have policies and preferences that are more positive towards taxis – they have also consistently indicated they see a nett change away from them. However, the magnitude of this perception is also lower in 2022, especially outside of Sydney.

In Sydney 14% of respondents felt their employer has allowed more use of taxis in the last 12 months, and 16% required them to use taxis less – for a nett differential of -2%. Outside of Sydney the nett differential for taxis was actually positive. For rideshare, in all locations the nett differentials remained positive, but the lowest seen other than in 2020 when COVID impacted all point-to-point transport use.

Figure 51: Changes in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33



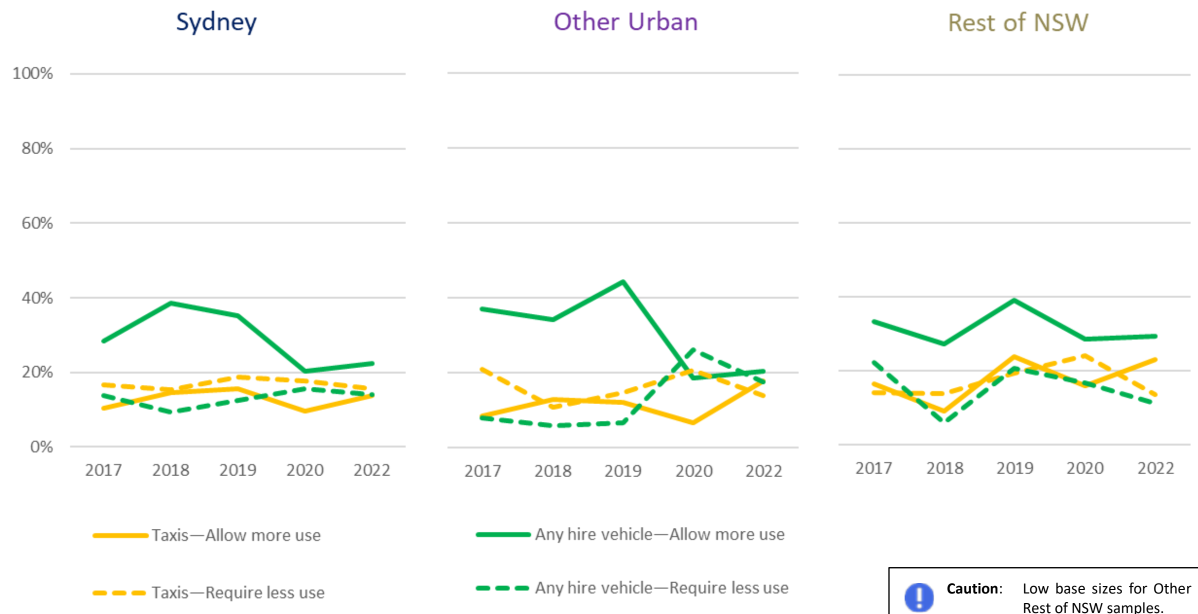
		2022	2020	2019	2018	2017
Taxis	Sydney	-2%	-8%	-3%	-1%	-6%
	Other urban	+4%	-14%	-3%	+2%	-13%
	Rest of NSW	+9%	-8%	+4%	-5%	+2%
Rideshare / Limo / Other hire vehicle	Sydney	+8%	+4%	+23%	+29%	+15%
	Other urban	+3%	-8%	+38%	+29%	+29%
	Rest of NSW	+18%	+12%	+18%	+21%	+11%

Base = Workplace at least sometimes pays for that transport [Sydney n=418-573; Other Urban n=51-85; Rest of NSW n=28-52]

Taken together, these results suggest that while taxis do remain the dominant form of point-to-point transport used by workplaces, there is an increasing acceptance of rideshare. However, in 2022 the scale of the move towards rideshare and away from taxis is much reduced.

[2] For simplicity, this question refers to "any rideshare, limousine or other hire vehicle" rather than differentiating.

Figure 52: Change over time in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33



Caution: Low base sizes for Other Urban and Rest of NSW samples.

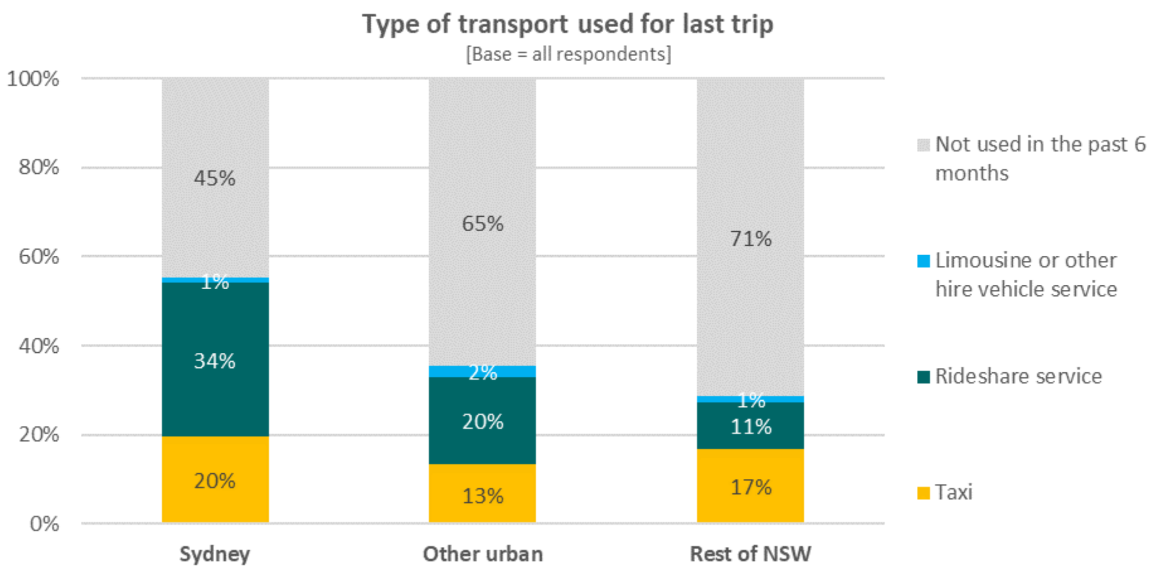
F. Last-Trip Details

Type of point-to-point transport

55% of Sydney respondents had used point-to-point transport in the last 6 months (similar to the 52% in 2020 but still well down from 68% in 2019), along with 35% in other urban areas (the same as 2020 and down from 51% in 2019) and 29% in the rest of NSW (similar to 26%, down from 40% in 2019).

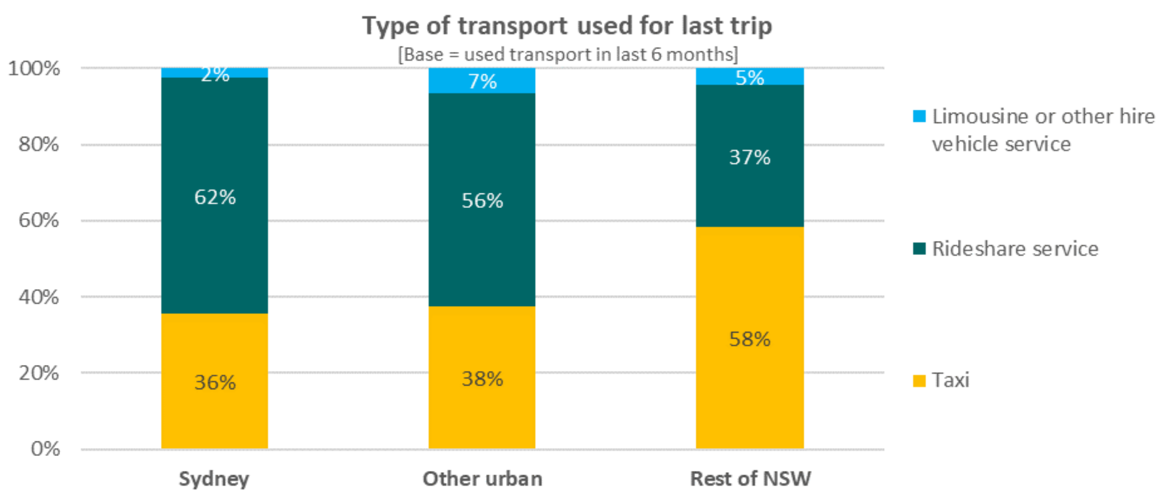
Similar to the pre-COVID surveys, even in this period of reduced total use, the usage of rideshare services has exceeded the usage of taxis in Sydney. In other urban areas, in 2020 both services were used to a similar extent, but in 2022 a greater proportion reported using rideshare for their very last trip rather than a taxi. In the rest of NSW taxis are still the predominant transport service being used. The following tracking chart highlights the increasing proportions of users of point-to-point transport in all locations who report that they used rideshare for the most recent trip.

Figure 53: Usage of vehicle types for last trip (base = all respondents) QX



Base = all respondents [Sydney n=2,070; Other Urban n=541; Rest of NSW n=412]

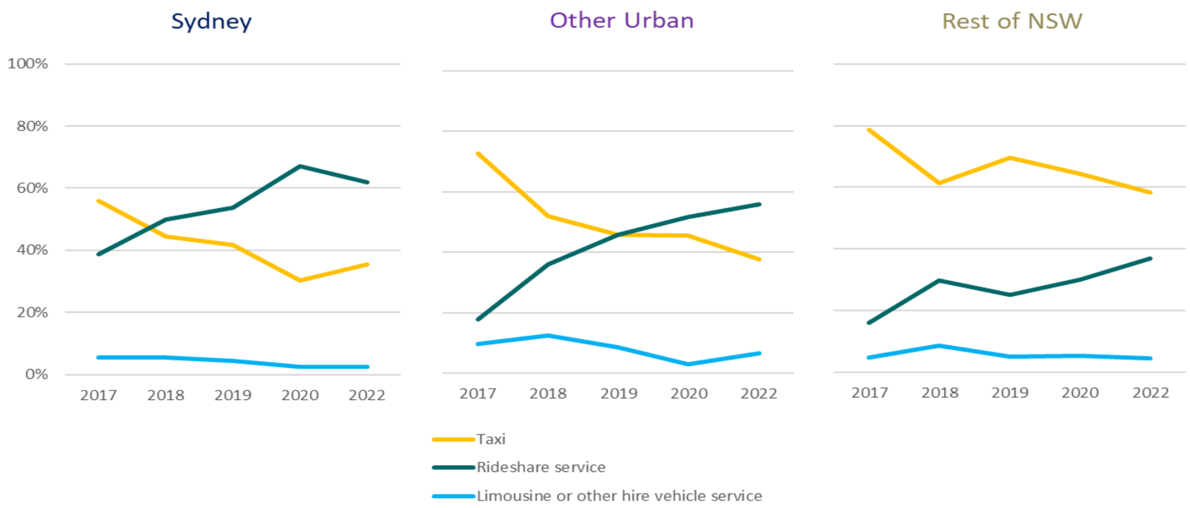
Figure 54: Usage of vehicle types for last trip (base = used transport in last 6 months) QX



Base = Used transport in the last 6 months [Sydney n=1,101; Other Urban n=180; Rest of NSW n=115]

The tracking chart here uses the data in the second chart on the previous page, showing the proportion of last trips taken using different forms of transport only for respondents who had taken at least one trip in the last six months. The slopes of the yellow taxi lines and the dark green rideshare lines very clearly show the change in distribution across the years, and how in 2020 and 2022 this proportionality has changed even within the lower overall volume of use.

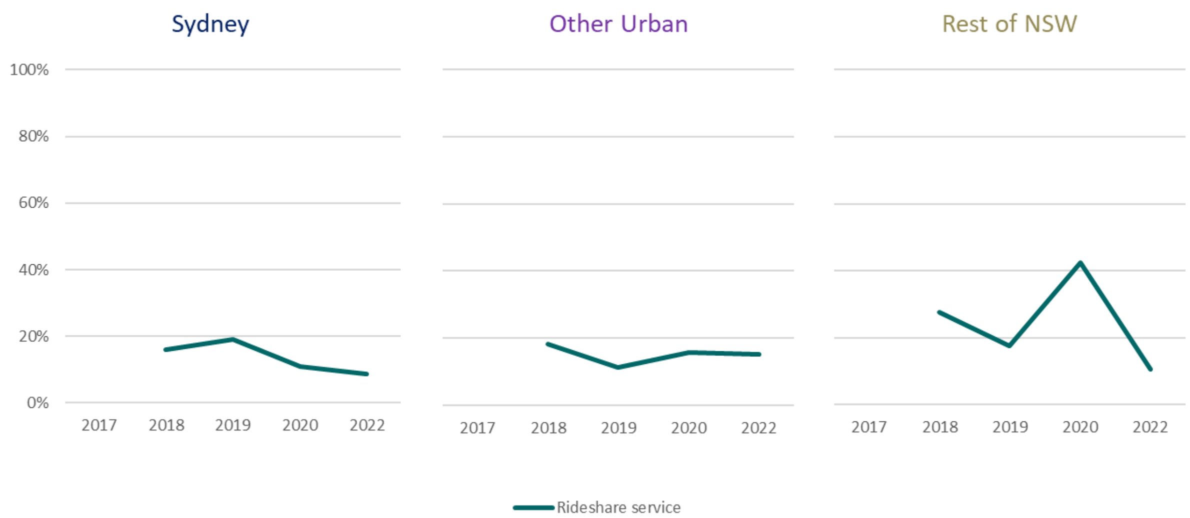
Figure 55: Changes in usage of vehicle types for last trip (base = used transport in last 6 months) QX



Pooled Rideshare

Pooled rideshare services involve multiple customers making a similar trip sharing the costs. Approximately one-in-ten respondents whose last trip was a rideshare in Sydney or other urban areas reported that a pooled rideshare service was used (9% and 15% respectively). The variation in estimates of rideshare users in the rest of NSW who report their last rideshare to be pooled are likely mostly explained by lower sample sizes in that location.

Figure 56: Usage of 'pooled' rideshare facility for last trip (base = used rideshare for last trip) Q36a



***Note**: These figures may be elevated by some respondents misunderstanding the term to mean 'sharing costs with people they were travelling with' rather than 'strangers who happen to be making a similar trip'. We suggest that the description of pooled rideshare may be expanded in future surveys to ensure correct interpretation. Comparable results across years suggest no dramatic change, but misinterpretation is potentially masking trends in this data.*

Last Trip Characteristics

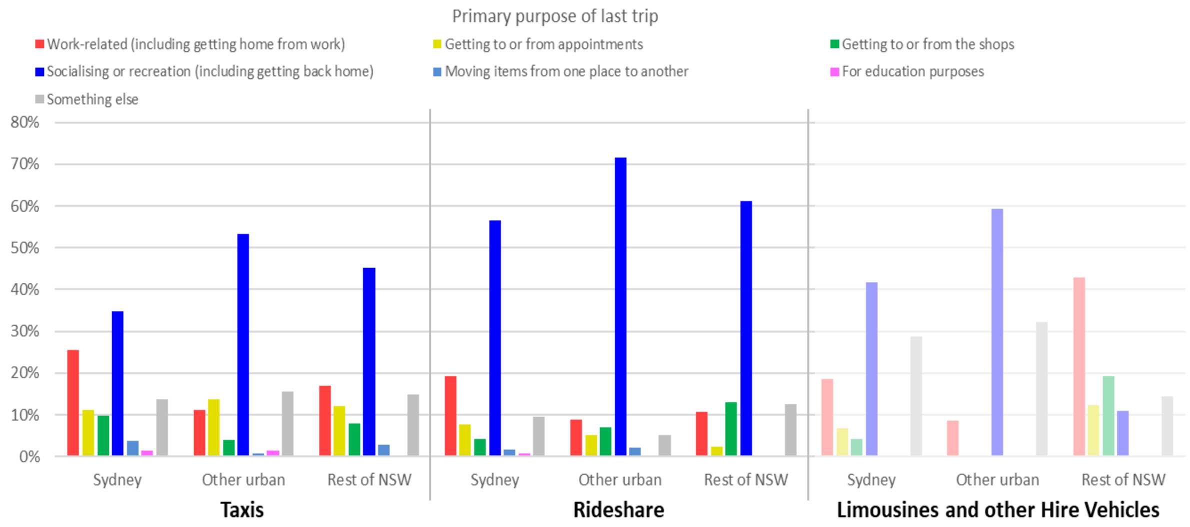
The next section looks at details of respondents' last trip in any type of point-to-point transport. Sample sizes for hire vehicles outside of Sydney are very small, and results for groups with sample of less than 30 are generally shown in a greyed out form in all tables and charts, and should be interpreted with great caution due to the small sample sizes.

Group	Sydney – Taxi	Sydney – Rideshare	Sydney – Limo / other HV	Other urban – Taxi	Other urban – Rideshare	Other urban – Limo / other HV	Rest of NSW – Taxi	Rest of NSW – Rideshare	Rest of NSW – Limo / other HV
2017 Sample	719	499	71	151	37	20*	126	26*	8*
2018 Sample	647	731	81	141	95	35	109	46	16*
2019 Sample	596	763	65	121	120	25*	121	41	9*
2020 Sample	325	715	26*	81	76	7*	69	22*	4*
2022 Sample	**415**	**657**	**29***	**69**	**95**	**16***	**77**	**32**	**6***

Purpose

Despite the lower volume of point-to-point transport usage in 2020 and 2022, the reasons for using point-to-point transport have remained fairly consistent. Socialising remains the dominant purpose for trips generally, and especially for rideshare. Socialising is also the main purpose for taxis, but to a lesser extent in all areas.

Figure 57: Last trip – Primary purpose C[Q39]



	Taxis			Rideshare			Limousines or other hire vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
	415	69	77	657	95	32	29	16	6
Work-related (inc getting home from work)	**25%**	11%	**17%**	**19%**	**9%**	11%	19%	9%	**43%**
Getting to or from **appointments**	11%	**14%**	12%	8%	5%	2%	7%	0%	12%
Getting to or from the **shops**	10%	4%	8%	4%	**7%**	**13%**	4%	0%	19%
Socialising or recreation (inc getting back home)	**35%**	**53%**	**45%**	**57%**	**72%**	**61%**	**42%**	**59%**	11%
Moving items from one place to another	4%	1%	3%	2%	2%	0%	0%	0%	0%
For **education** purposes	1%	2%	0%	1%	0%	0%	0%	0%	0%
Something else	**14%**	**16%**	**15%**	**10%**	5%	**13%**	**29%**	**32%**	15%

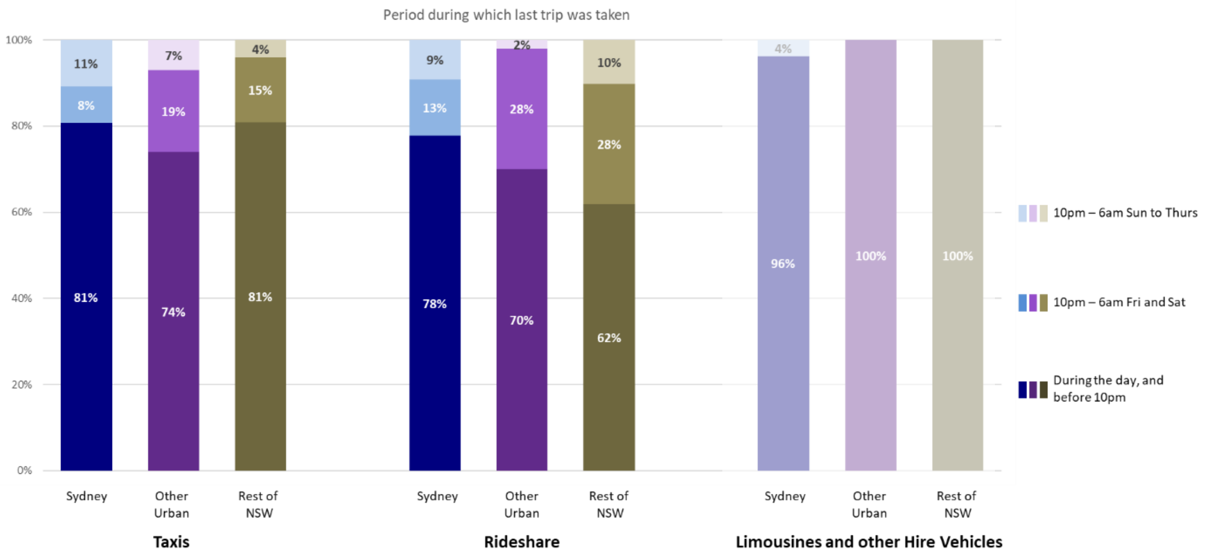
Bold figures = Top 3 responses.
Note small base sizes in some cases.

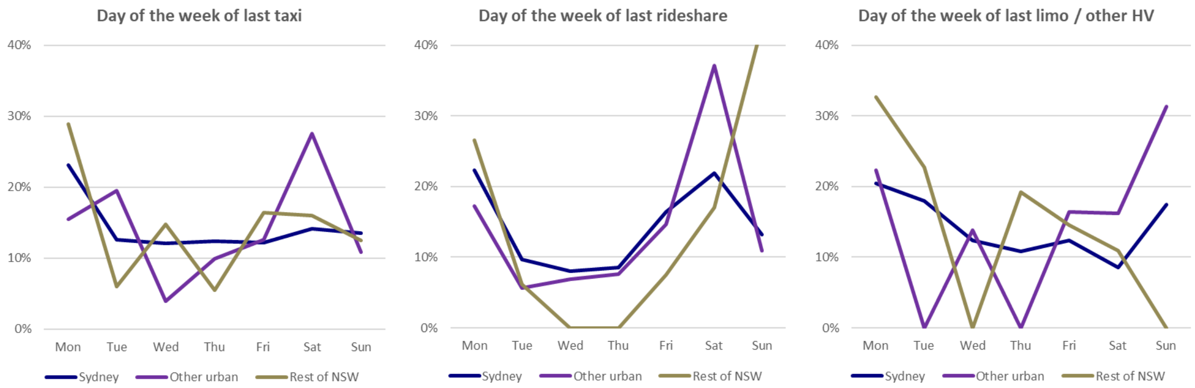
Time

Consistent with previous surveys, a majority of last trips reported on were during the day or before 10pm. Outside of Sydney, last rideshare use is somewhat more likely after 10pm.

Overall, rideshare trips show a more substantial peak on Fridays and Saturdays as compared to taxis, which are more evenly distributed through the week including on the weekends. This pattern is consistent with previous years, suggesting again that patterns of use of taxis and rideshare have remained reasonably consistent with previous years, just with lower overall volumes. This different distribution, alongside the different ways taxis and rideshare are obtained, suggests that they are often used in quite different ways by their user bases.

Figure 58: Last trip – Period and day commenced Q38





Base = Used transport in the last 6 months [Sydney n=29*-657; Other Urban n=16*-95; Rest of NSW n=6*-77]

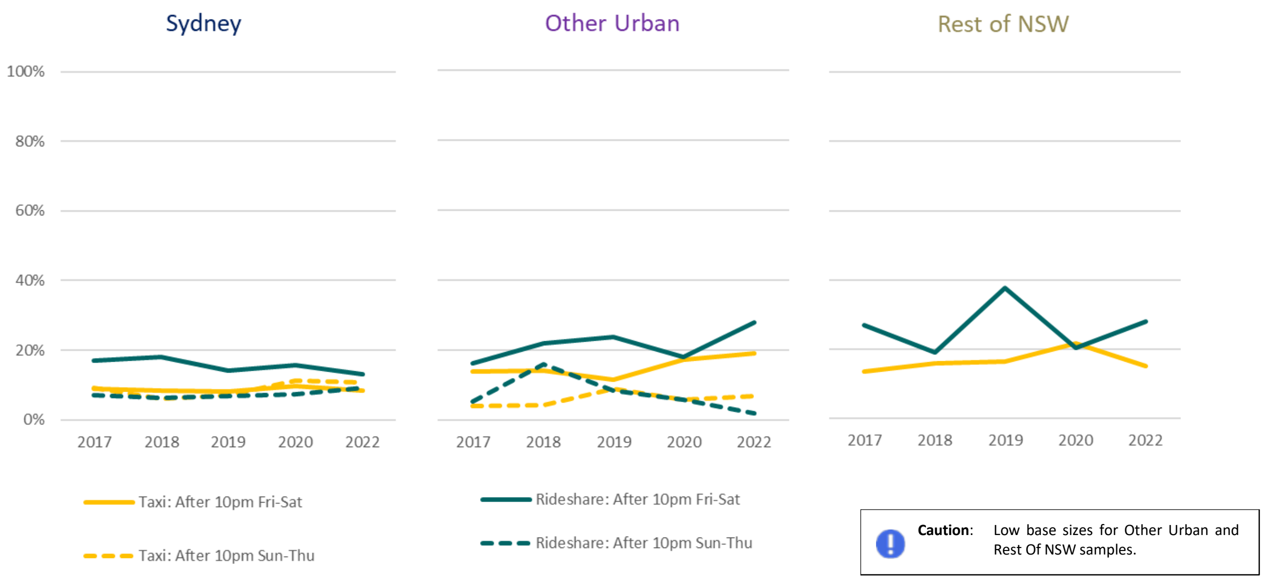
Caution: Low base sizes for Other Urban and Rest Of NSW samples.

***Note**: This question was slightly modified from 2017 to 2018. In 2017 the response table showed up to midnight for each day, and then midnight-6am as part of the following day. The data suggested that some respondents were mis-classifying trips taken after midnight. In 2018 a separate category of 'after midnight' was added to each day, and the following day started with 'early morning – midday'. The improved response scale has given a more natural looking distribution.*

The tracking chart looking at the proportion of last trips shows more clearly the consistently higher proportion of rideshare trips that are after 10pm on Friday or Saturday night. The tracking chart does suggest that proportional use of rideshare after 10pm on Friday and Saturday nights is slowly becoming less common in Sydney, but more common in other urban areas.

The rest of NSW samples here are very small, and so results should be interpreted with caution.

Figure 59: Last trip – Change in proportion of Last Trips after 10pm Q38



Note: Due to changes in the way this question was asked in 2018, some care should be taken comparing the post-2018 results to 2017.

Pick-up Location

The biggest difference in pick up and drop off locations in 2020 was the reduced prevalence of airport trips for taxis, but beyond that the pattern of locations was quite similar to previous surveys. In 2022 airport use returned to some extent, while private homes remain the most commonly reported pick up point for a last trip. A consistent pattern observed is that rideshare services are equally likely to pick up or drop off at a private home, whereas taxis are more likely to drop off and limousines and other hire vehicles are more likely to pick up. This broad pattern is again seen in 2022.

Figure 60: Last trip – pick up locations Q37

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

Sydney Last trip – Pick up / Drop off locations	Taxi		Rideshare		Limousines or other hire vehicle services	
	Pick up	*Drop off*	*Pick up*	*Drop off*	*Pick up*	*Drop off*
Sample size (Excludes can't recall):	*415*	*415*	*657*	*657*	*29*	*29*
A private **home** or apartment	**31%**	**48%**	**48%**	**45%**	**51%**	**25%**
A **workplace** or office	13%	**10%**	**8%**	**11%**	4%	4%
A **shop** or shopping centre	8%	7%	5%	5%	0%	0%
A **pub, club** or other similar type of location	6%	5%	**11%**	**11%**	12%	8%
In a **CBD**, town centre or other busy area	**14%**	6%	10%	8%	0%	0%
At an **event**	3%	6%	4%	6%	**8%**	**13%**
At an **airport**	**15%**	**10%**	6%	10%	**20%**	**48%**
At a **train station** or other transport connection	8%	2%	4%	2%	4%	0%
Hospital or **medical** facility	1%	5%	1%	1%	0%	3%
Somewhere else	2%	1%	1%	1%	0%	0%

Other urban Last trip – Pick up / Drop off locations	Taxi		Rideshare		Limousines or other hire vehicle services	
	Pick up	*Drop off*	*Pick up*	*Drop off*	*Pick up*	*Drop off*
Sample size (Excludes can't recall):	*69*	*69*	*95*	*95*	*16*	*16*
A private **home** or apartment	**44%**	**49%**	**58%**	**44%**	65%	30%
A **workplace** or office	5%	**12%**	3%	6%	0%	0%
A **shop** or shopping centre	5%	4%	**6%**	4%	5%	0%
A **pub, club** or other similar type of location	**20%**	**12%**	**17%**	**22%**	0%	5%
In a **CBD**, town centre or other busy area	5%	4%	4%	6%	0%	0%
At an **event**	2%	3%	3%	6%	0%	40%
At an **airport**	2%	3%	3%	4%	23%	21%
At a **train station** or other transport connection	**13%**	8%	4%	3%	0%	0%
Hospital or **medical** facility	2%	3%	1%	4%	0%	0%
Somewhere else	4%	2%	1%	3%	7%	5%

Base: Used the type of transport in the last 6 months

Bold figures = Top 3 responses. Most "something else" responses were back-coded into existing categories. Note small base sizes in some cases.

Rest of NSW Last trip – Pick up / Drop off locations	Taxi		Rideshare		Limousines or other hire vehicle services	
	Pick up	*Drop off*	*Pick up*	*Drop off*	*Pick up*	*Drop off*
Sample size (Excludes can't recall):	*77*	*77*	*32*	*32*	*6*	*6*
A private **home** or apartment	**44%**	**52%**	**38%**	**39%**	88%	11%
A **workplace** or office	3%	8%	20%	9%	0%	20%
A **shop** or shopping centre	**12%**	**0%**	**2%**	**9%**	0%	19%
A **pub, club** or other similar type of location	**21%**	**9%**	**26%**	**35%**	0%	0%
In a **CBD**, town centre or other busy area	12%	9%	0%	0%	12%	0%
At an **event**	1%	1%	7%	0%	0%	0%
At an **airport**	0%	9%	3%	2%	0%	37%
At a **train station** or other transport connection	6%	2%	0%	2%	0%	0%
Hospital or **medical** facility	2%	6%	0%	0%	0%	0%
Somewhere else	0%	4%	3%	3%	0%	12%

Base: Used the type of transport in the last 6 months

Bold figures = Top 3 responses. Most "something else" responses were back-coded into existing categories. Note small base sizes in some cases.

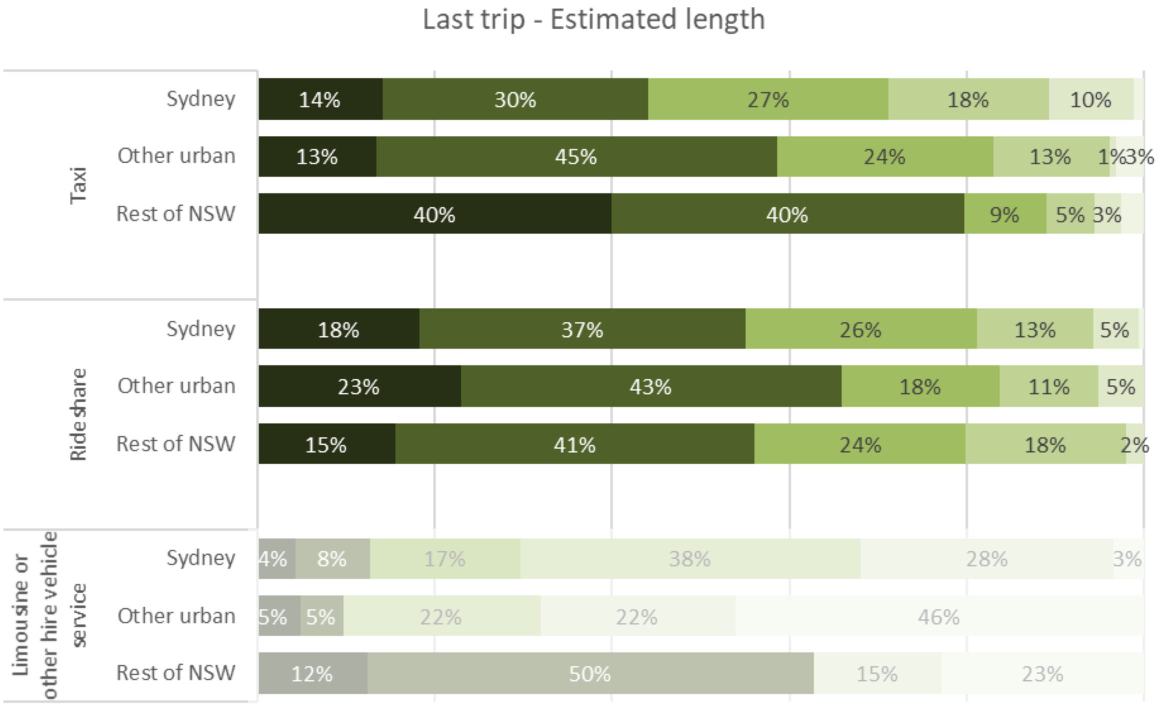
Length

Estimated length of taxi trips tend to be shortest from the Rest of NSW respondents, and longest in Sydney, likely reflecting the relative geographic size of centres. In the 2020 survey this effect was still visible, but not to the same extent as usual – but in 2022 the more usual pattern is apparent.

Before 2020 there appeared to be less variation in length of rideshare trips across locations than there was in taxi trips (bearing in mind the smaller sample sizes outside Sydney) – but in 2020 the data in Sydney and Other Urban areas was very similar in this respect. In 2022 rideshare variations in length across locations are again less than seen for taxi users.

Perhaps not surprisingly, trips in limousines or other hire vehicles tend to be somewhat longer, though sample sizes for these trips are very small in all locations in 2022.

Figure 61: Last trip – Estimated length Q55



Base = Used transport in the last 6 months [Sydney n=29-657; Other Urban n=16-95; Rest of NSW n=6-77]

Reason for Choice of Vehicle Type

Since the 2018 survey, reasons for choosing the particular type of transport service are allowed more detail, collecting not only the *main* reason for the choice, but also any other reasons ('*total*'). In 2020, perceptions of convenience are still the most important reason for choice, both as the main reason and amongst total reasons.

Being more convenient than driving is a common reason for choosing point-to-point transport in all locations, and for all types of choice made. Waiting times are generally more important than travel times, and in all locations generally appear in the top three main and total reasons for choice made.

In Sydney, total travel time is the third biggest reason for choice of vehicle. Outside of Sydney not having access to any other transport options is a major consideration when choosing taxis, while for rideshare the other common consideration is it being cheaper than alternative.

Only a small proportion indicate that being a good option in COVID was a consideration.

Figure 62: Reasons for using a particular type of transport for the most recent trip Q40

Reasons for use instead of other transport options or driving yourself		Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
		Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
n=	*Main*	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
	Total	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Quicker to get / shorter waiting time	Main	23%	19%	8%	21%	21%	9%	4%	0%	33%
	Total	33%	21%	11%	39%	36%	14%	19%	13%	44%
Quicker or more direct travel time	Main	15%	11%	10%	11%	6%	5%	11%	7%	0%
	Total	27%	19%	17%	26%	14%	9%	16%	7%	0%
More convenient than driving	Main	21%	29%	28%	23%	38%	39%	25%	30%	0%
	Total	30%	45%	34%	33%	46%	44%	36%	30%	20%
More convenient than other paid transport options I could have used	Main	9%	2%	7%	8%	3%	5%	10%	9%	0%
	Total	24%	17%	13%	23%	12%	16%	27%	20%	15%
Cheaper than alternatives	Main	3%	0%	3%	11%	14%	22%	4%	0%	34%
	Total	9%	9%	5%	23%	25%	29%	14%	0%	34%
More reliable than alternatives	Main	2%	7%	6%	3%	1%	0%	11%	13%	0%
	Total	10%	7%	12%	11%	7%	0%	22%	21%	11%
Makes different types of vehicle (eg: van, ute or luxury) available	Main	1%	0%	0%	1%	0%	0%	8%	9%	0%
	Total	4%	4%	2%	3%	3%	0%	16%	26%	0%
I didn't have access to any other transport options	Main	10%	20%	22%	10%	9%	3%	4%	9%	34%
	Total	16%	21%	33%	15%	15%	19%	6%	18%	34%
It's what I am most comfortable or familiar using	Main	5%	7%	1%	5%	1%	0%	0%	5%	0%
	Total	13%	14%	6%	15%	7%	0%	14%	10%	12%
It was a good option to use during COVID conditions	Main	4%	0%	1%	2%	2%	3%	9%	4%	0%
	Total	9%	2%	4%	7%	3%	3%	25%	9%	0%
Other	Main	8%	5%	14%	3%	6%	14%	14%	14%	0%
	Total	8%	7%	14%	5%	10%	16%	18%	19%	0%

Base = Used transport in the last 6 months

Obtaining a Vehicle

The bulk of taxis in all locations (68%-81%) are obtained through a combination of rank and hail, and by phoning taxi companies. This total proportion has been slightly down on the 75%-91% in 2019 in both 2020 and 2022, with the cumulative use of apps and internet bookings slowly increasing to make up nearly a quarter of last taxis caught in Sydney and in other urban areas.

In Sydney rank and hail still represented nearly half of all most recent taxi trips (47%) – but this total proportion has declined from 54% in 2019. Outside of Sydney the proportions switch to be more dominantly from telephone, and hailing typically accounts for a very small proportion only. Internet or app booking is less used in the rest of NSW region, but growing (from 5% in 2019 to 14% in 2022).

Rideshare is almost exclusively obtained by smartphone apps (more than three quarters of all last rideshares in Sydney were obtained this way) or by an internet booking.

The relatively small number of last trips that were by limousines and other hire vehicles are mostly obtained by phone or internet bookings, or by contacting a driver directly. Sample sizes are too small for this type of transport in 2022 to draw any strong conclusions, but a similar pattern is visible.

Figure 63: Last trip – Method of obtaining vehicle Q41

Last trip – Method of obtaining vehicle	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
At a **taxi rank**	**27%**	15%	22%						
Hailed/waved down on the street	20%	2%	5%						
Rank + hail	**47%**	17%	27%						
Phoned a taxi company	21%	**54%**	**54%**						
Rank + hail + phone taxi company	**68%**	**71%**	**81%**						
By calling a **phone number**				2%	2%	3%	24%	55%	77%
By **internet booking**	13%	12%	7%	**11%**	**19%**	**18%**	25%	23%	23%
Contacted a **driver directly**	5%	1%	1%	2%	0%	18%	28%	5%	0%
Had a **regular booking**	3%	2%	1%	3%	1%	0%	4%	0%	0%
Used a **smartphone application** (app)	9%	13%	7%	**80%**	**74%**	**56%**	0%	9%	0%
Some **other way**	0%	0%	0%	0%	2%	0%	3%	0%	0%
Not sure, someone else organised it	2%	2%	2%	1%	2%	5%	17%	9%	0%

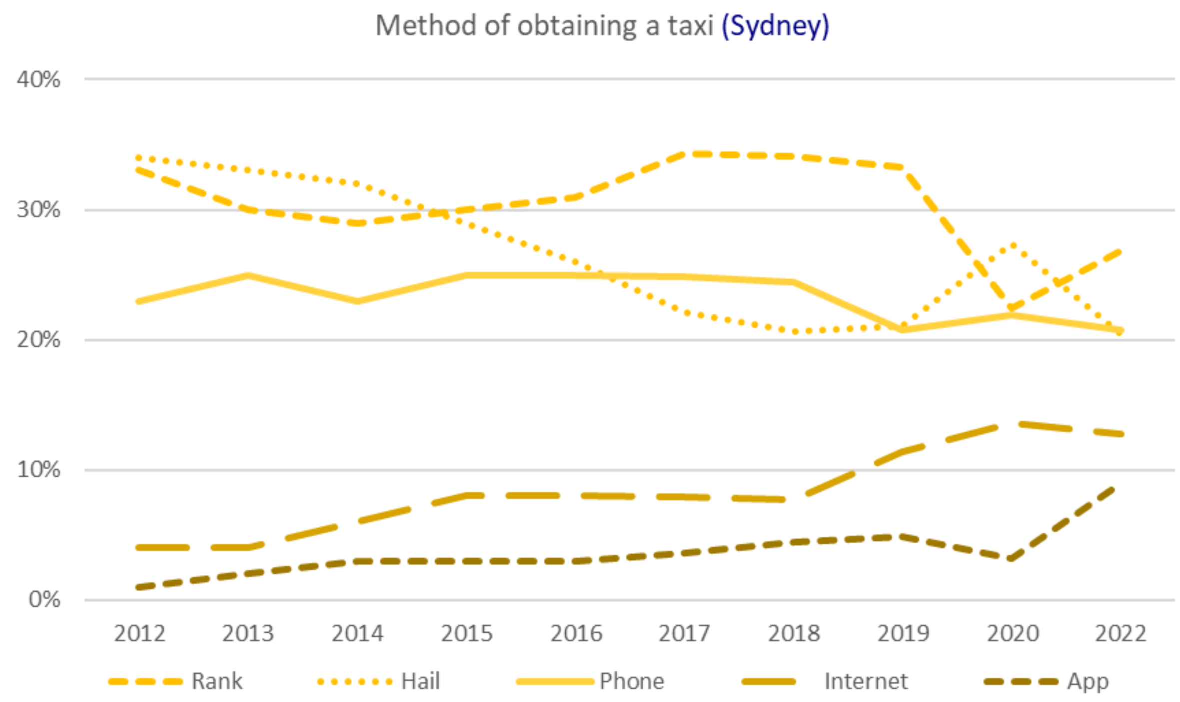
NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

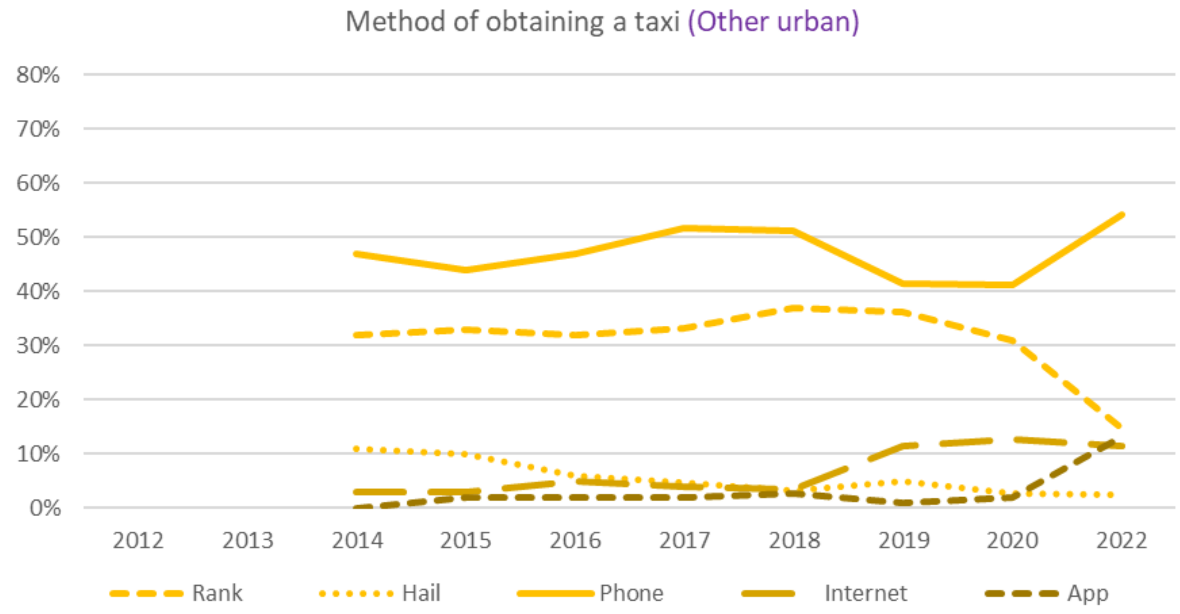
Note small base sizes in some cases.

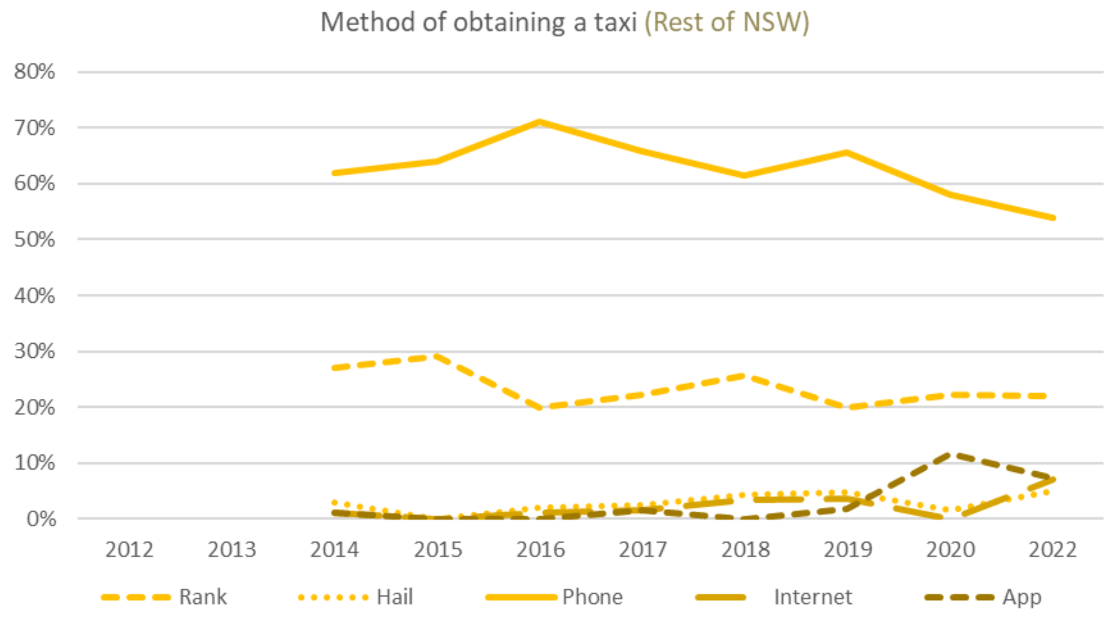
The most substantive change over time in how taxis are obtained has been the increase in taxis obtained via internet bookings and via an app. In Sydney and other urban areas this combined approach now accounts for nearly a quarter of last taxi trips. This change seems to be primarily reducing reliance on hailing one in the street, though reported use of ranks also fell sharply in the 2020 survey and remains lower in 2022.

Outside of Sydney, most taxis are usually obtained by phone or from a rank, with hailing much less common. Use of ranks in other urban areas has fallen very sharply in the 2020 and 2022 surveys.

Figure 64: Last trip – Changes in method of obtaining vehicle Q41







In 2020 and again in 2022 there was a somewhat greater reliance on ASAP / next available bookings rather than cars pre-booked for a particular time, and this was seen across both taxis and rideshare. 61% of booked taxis were ASAP bookings in Sydney in 2022, consistent with the 62% seen in 2020 and both up from 55% in 2019. The equivalent figure for rideshare was 92%, unchanged from 2020 and both slightly higher than the 88% seen in 2019.

Trends outside of Sydney are less consistent, but if anything suggest that in those areas booked taxis are becoming slightly more likely to be ASAP bookings, while rideshare is slightly less likely to be booked for an ASAP pickup.

As usual, the majority of limousines and other hire vehicles were booked for a particular time, even amongst the small sample sizes available in 2022.

Figure 65: Last trip – Type of booking Q48

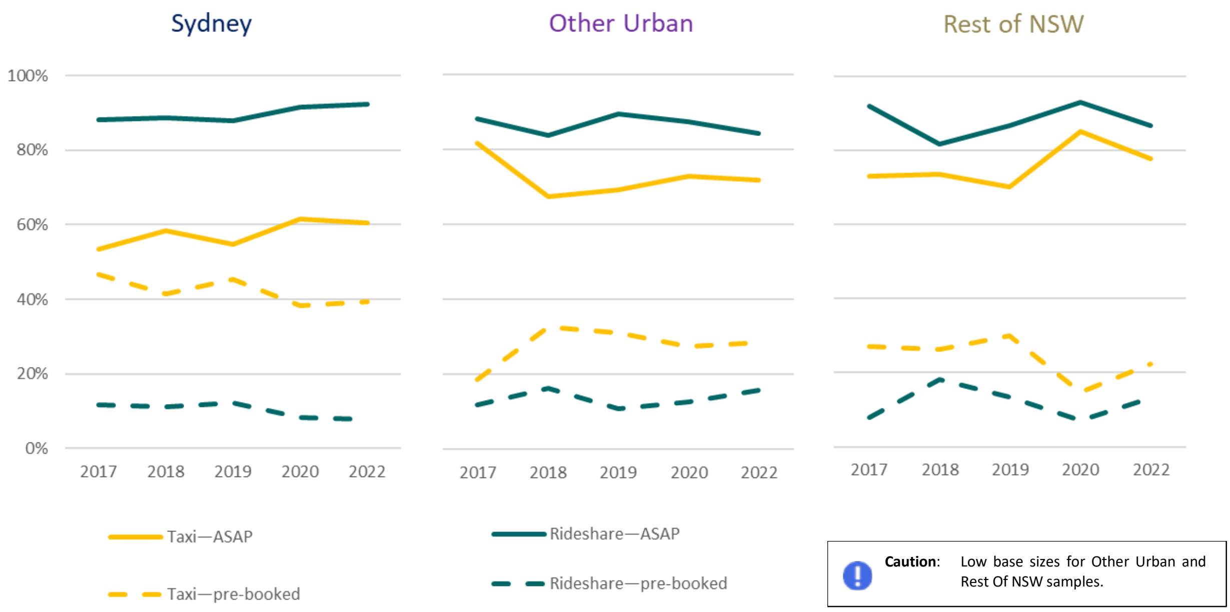
NOTE: Reduced base sizes / small bases sizes for Other Urban and Rest of NSW.

Last trip – Method of obtaining vehicle	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Booked the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*195*	*56*	*56*	*632*	*90*	*30*	*23*	*15*	*6*
As soon as possible / the next available	**61%**	**72%**	**78%**	**92%**	**84%**	**87%**	11%	5%	43%
For a particular time	**39%**	**28%**	22%	8%	16%	13%	89%	95%	57%

In Sydney both taxis and rideshare bookings have become slightly more likely to be ASAP bookings. In other urban areas and the rest of NSW there was a slight tendency for bookings to be pre-bookings in 2022. Overall though, the tracking charts suggest that the macro proportions of ASAP and pre-bookings across locations and transport types is not changing dramatically.

Figure 66: Last trip – Changes in type of booking Q48

NOTE: Reduced base sizes / small bases sizes for Other Urban and Rest of NSW.



Awareness of service provider

Awareness of service provider names is not significantly changing. The great majority of rideshare users (around 4-in-5) report that they know the name of the service they used, while far fewer users of taxis do, especially those who are using rank and hail taxis.

Typically around 2-in-5 users of booked taxis think they are aware of the name of the taxi company they used, while typically less than 1-in-5 users of rank and hail taxis think they do.

Figure 67: Last trip – Awareness of service provider Q42/Q45

Last Trip—Awareness of Service Provider	Taxi					
Base: Used the type of transport in the last 6 months AND method of obtaining last vehicle	Sydney	Sydney	Other urban	Other urban	Rest of NSW	Rest of NSW
	Rank & Hail	Booked	Rank & Hail	Booked	Rank & Hail	Booked
Sample size	*199*	*174*	*11*	*55*	*18*	*55*
Aware	12%	40%	22%	37%	23%	**52%**
"Think so"	2%	3%	5%	11%	13%	7%
Not aware	**86%**	**57%**	**73%**	**52%**	**64%**	41%

	Rideshare Services			Limousines or Other Hire Vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
	Booked	Booked	Booked	Booked	Booked	Booked
Sample size	*619*	*90*	*27*	*15*	*14*	*6*
Aware	**80%**	**78%**	**74%**	28%	30%	46%
"Think so"	1%	2%	0%	9%	0%	0%
Not aware	19%	20%	26%	**63%**	**70%**	**54%**

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

Bold figures = 50%+ of category. Note small base sizes in some cases.

Consideration of booking when using rank and hail

1-in-5 respondents in Sydney whose most recent trip was a rank or hail taxi did at least consider calling or booking a vehicle too – similar to the 18%-20% seen in 2019 and 2020. Outside of Sydney, due to the small sample size, these results should be considered as purely indicative.

Figure 68: Rank and Hail taxi users who considered calling or booking transport instead Q43

	Sydney	Other Urban	Rest of NSW
Proportion of people whose last trip was by taxi obtained from Rank or Hail who at least considered calling or booking instead:	23%	14%	39%
Sample size	*199*	*11*	*18*

Base = Used Rank or Hail taxi for the last trip

Clearly the most common reason for not calling or booking a vehicle after considering doing so was once again having immediate access to a taxi by rank or hail. Beyond this immediate availability, the next most common reason was not wanting to pay a booking fee.

The general relative proportions of these reasons are consistent with what has been previously seen, even with the small samples involved.

Figure 69: Reasons for not calling or booking transport after considering that option Q44

NOTE: Small bases sizes. Interpret grey numbers with caution

Reasons for not calling or booking after considering that option	Sydney	Other Urban	Rest of NSW
There was a taxi immediately available at the rank/to be hailed on the street	**46%**	36%	34%
You did not want to pay a booking fee	**25%**	0%	39%
You didn't think a booked taxi would arrive any faster	12%	0%	14%
You wanted to be anonymous	13%	64%	0%
You didn't have access to a phone or the internet to make a booking	5%	0%	13%
You didn't know how to book a taxi or other vehicle	0%	0%	0%
Something else	7%	0%	0%
Sample size	*43*	*2*	*7*

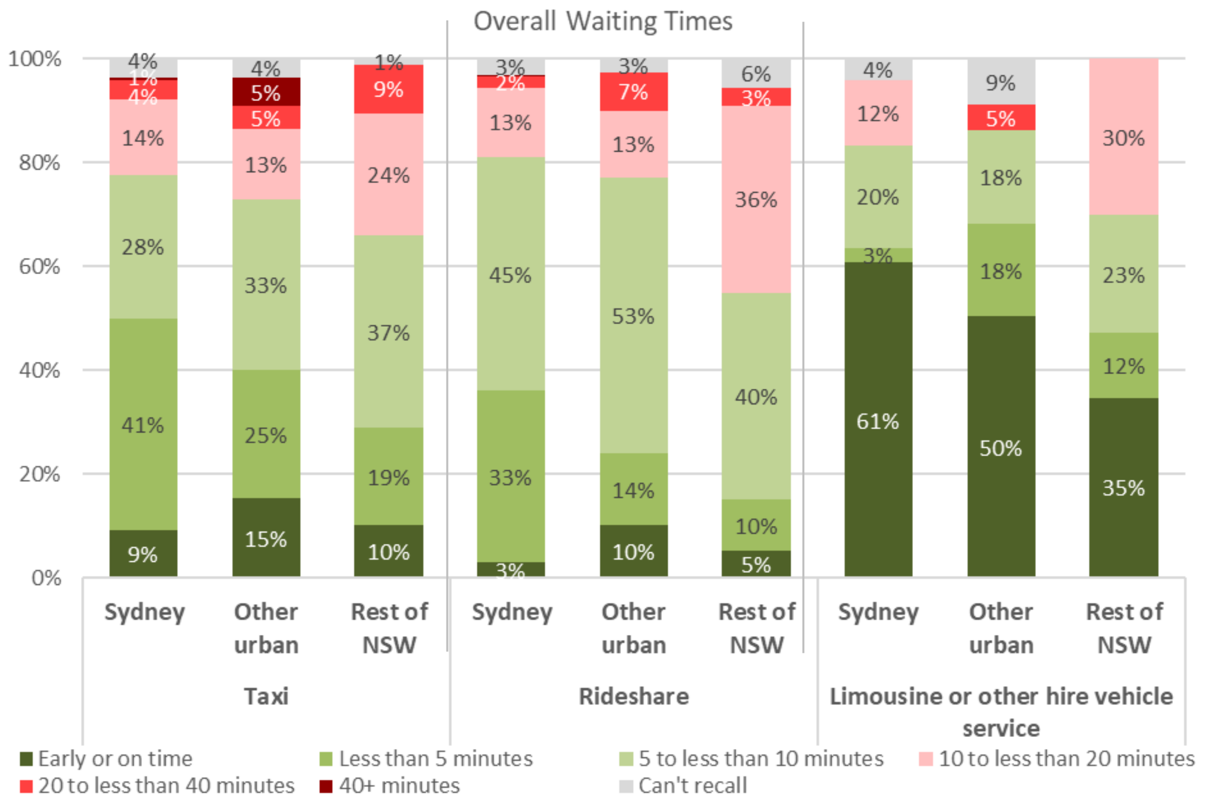
Base = Used Rank or Hail taxi for the last trip AND considered calling or booking transport

Waiting Time

Despite waiting times and availability being perceived to be strong competitive advantages of rideshare services over taxis in general, respondents again report only small differences on the last time used, and if anything, taxis were once again slightly more likely than rideshare to be obtained within 5 minutes. However, the detailed breakdowns in the following section show that the strong performance of taxis overall is mostly driven by short rank and hail waiting times, and in the ASAP booking category – which is most directly equivalent to the typical rideshare process of getting a vehicle – waiting times for taxis *are* typically somewhat longer.

Figure 70: Overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52

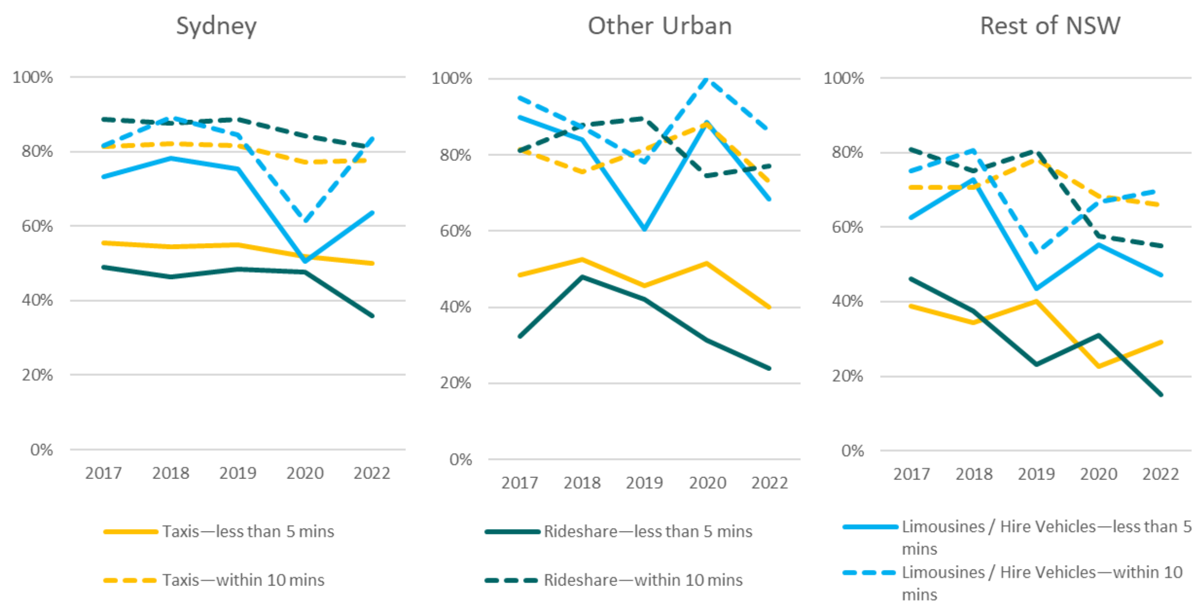
Last trip – Overall waiting time	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Early or on time (pre-booking only)	9%	15%	10%	3%	10%	5%	61%	50%	35%
Less than 5 minutes	41%	25%	19%	33%	14%	10%	3%	18%	12%
Within 5 minutes	**50%**	**40%**	**29%**	**36%**	**24%**	**15%**	**64%**	**68%**	**47%**
5 to less than 10 minutes	28%	33%	37%	45%	53%	40%	20%	18%	23%
Within 10 minutes	**78%**	**73%**	**66%**	**81%**	**77%**	**55%**	**83%**	**86%**	**70%**
10 to less than 20 minutes	14%	13%	24%	13%	13%	36%	12%	0%	30%
20 to less than 40 minutes	4%	5%	9%	2%	7%	3%	0%	5%	0%
40 or more minutes	1%	5%	0%	0%	0%	0%	0%	0%	0%
Can't recall	4%	4%	1%	3%	3%	6%	4%	9%	0%



Base = Last trip within last 6 months [Sydney n=24-702; Other Urban n=1-114; Rest of NSW n=3-72]

The tracking charts suggest that waiting times for point-to-point transport services have been getting slightly longer over time, especially for rideshare. Results in 2020 and 2022 indicate that fewer vehicles have been available in 5 or 10 minutes than was previously the case.

Figure 71: Changes in overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Detailed waiting times by time of day

Waiting times in Sydney were very consistent across the time of the day or week. While the majority of respondents' last trip was during the day and before 10pm, there were sufficient sample sizes who trips were after 10pm on Friday-Saturday or Sunday-Thursday to compare waiting times. For both taxis and for rideshare, there was virtually no difference in reported waiting times across these groups.

Figure 72: Overall waiting times for taxis and rideshare, by region Q46/47/50/51/52

Last trip – Overall waiting time in Sydney, by time of week	**Taxis**			**Rideshare Services**		
Base: Used the type of transport in the last 6 months	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**
Sample size	*341*	*32*	*42*	*518*	*81*	*58*
Early or on time (pre-booking only)	11%	0%	6%	4%	1%	0%
Less than 5 minutes	39%	49%	44%	34%	33%	30%
Within 5 minutes	**50%**	**49%**	**51%**	**37%**	**34%**	**30%**
5 to less than 10 minutes	28%	26%	29%	44%	51%	45%
Within 10 minutes	**78%**	**75%**	**80%**	**81%**	**84%**	**75%**
10 to less than 20 minutes	15%	12%	15%	13%	9%	20%
20 to less than 40 minutes	4%	2%	2%	2%	4%	2%
40 or more minutes	0%	3%	0%	0%	0%	0%
Can't recall	3%	8%	2%	3%	2%	4%

Sample sizes were too small in the other areas to look at waiting times other than for those whose last trip was during the day and before 10pm.

Last trip – Overall waiting time other urban areas, by time of week	**Taxis**			**Rideshare Services**		
Base: Used the type of transport in the last 6 months	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**
Sample size	*55*	*11*	*3*	*69*	*24*	*2*
Early or on time (pre-booking only)	21%	0%	0%	15%	0%	0%
Less than 5 minutes	23%	24%	42%	17%	7%	0%
Within 5 minutes	**44%**	**24%**	**42%**	**31%**	**7%**	**0%**
5 to less than 10 minutes	36%	25%	22%	49%	60%	100%
Within 10 minutes	**80%**	**49%**	**65%**	**80%**	**68%**	**100%**
10 to less than 20 minutes	11%	15%	35%	12%	15%	0%
20 to less than 40 minutes	2%	15%	0%	5%	13%	0%
40 or more minutes	3%	16%	0%	0%	0%	0%
Can't recall	4%	4%	0%	2%	4%	0%

Last trip – Overall waiting time other NSW, by time of week	**Taxis**			**Rideshare Services**		
Base: Used the type of transport in the last 6 months	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**
Sample size	*64*	*10*	*3*	*21*	*7*	*4*
Early or on time (pre-booking only)	12%	0%	0%	4%	0%	23%
Less than 5 minutes	23%	0%	0%	8%	19%	0%
Within 5 minutes	**36%**	**0%**	**0%**	**12%**	**19%**	**23%**
5 to less than 10 minutes	39%	37%	0%	57%	9%	24%
Within 10 minutes	**75%**	**37%**	**0%**	**69%**	**27%**	**47%**
10 to less than 20 minutes	16%	52%	65%	26%	64%	21%
20 to less than 40 minutes	8%	10%	35%	5%	0%	0%
40 or more minutes	0%	0%	0%	0%	0%	0%
Can't recall	2%	0%	0%	0%	9%	32%

Detailed waiting times by method of obtaining vehicles

While there was little overall difference in reported waiting times for taxis and rideshare, for the directly comparable ASAP bookings category, rideshare users *did* report shorter wait times than taxis in all locations. For pre-booked cars, taxis were a little more likely to arrive early or on time. These patterns are as have been previously observed.

Figure 73: Detailed waiting times by methods of obtaining a vehicle Q46/47/50/52

Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Rank									
Less than 5 minutes	74%	85%	37%						
5 to less than 10 minutes	22%	15%	33%						
10 to less than 20 minutes	3%	0%	19%						
20 to less than 40 minutes	0%	0%	7%						
More than 40 minutes	0%	0%	0%						
Can't recall	1%	0%	6%						
Sample	112	10	15						
Hail									
Less than 5 minutes	61%	100%	65%						
5 to less than 10 minutes	22%	0%	0%						
10 to less than 20 minutes	10%	0%	35%						
20 to less than 40 minutes	4%	0%	0%						
More than 40 minutes	0%	0%	0%						
Can't recall	3%	0%	0%						
Sample	87	1	3						
ASAP booking									
Less than 5 minutes	14%	15%	11%	36%	15%	9%	0%	0%	-
5 to less than 10 minutes	45%	49%	50%	47%	62%	46%	0%	0%	-
10 to less than 20 minutes	28%	23%	28%	12%	13%	38%	100%	0%	-
20 to less than 40 minutes	8%	5%	11%	2%	7%	4%	0%	100%	-
More than 40 minutes	1%	7%	0%	0%	0%	0%	0%	0%	-
Can't recall	4%	1%	0%	3%	3%	3%	0%	0%	-
Sample	118	39	44	582	74	25	2	1	3
Pre-booking									
It was early or on-time	43%	63%	60%	28%	64%	41%	84%	58%	60%
Less than 5 minutes	15%	6%	10%	10%	6%	18%	0%	10%	0%
5 to less than 10 minutes	18%	12%	16%	28%	13%	18%	10%	21%	40%
10 to less than 20 minutes	15%	0%	9%	23%	7%	22%	6%	0%	0%
20 to less than 40 minutes	3%	7%	5%	5%	10%	0%	0%	0%	0%
More than 40 minutes	0%	0%	0%	0%	0%	0%	0%	0%	0%
Can't recall	6%	12%	0%	5%	0%	0%	0%	10%	0%
Sample	87	18	13	67	17	5	22	14	3

Waiting time estimates

Waiting time estimates remain extremely common for ASAP booked rideshares, with just 3%-4% who were confident they were not given a waiting time estimate – consistent with previous years.

For ASAP taxis, providing waiting time estimates remains less widespread, though still common. 53%-67% of booked taxis gave a waiting time estimate in 2022, similar to the 2020 (51%-58%) and 2019 (53%-61%) figures given the sample sizes involved.

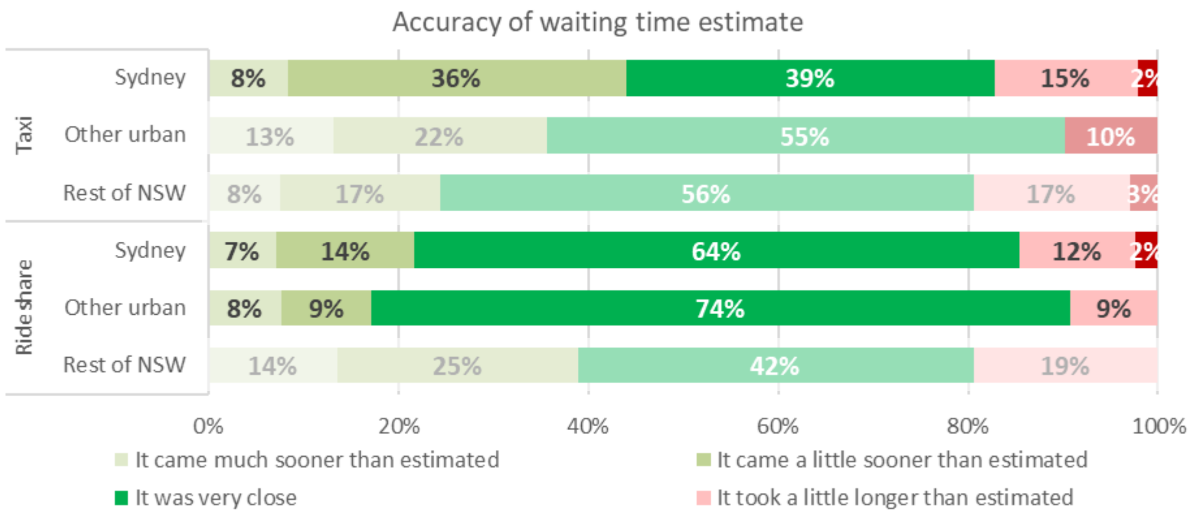
Figure 74: Last trip – Prevalence of being given a waiting time estimate for ASAP bookings Q49

Last trip – Given waiting time estimate	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months and made ASAP booking	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*118*	*39*	*44*	*582*	*74*	*25*	*2*	*1*	*3*
Yes	67%	53%	54%	92%	92%	97%	0%	-	100%
No	16%	33%	36%	3%	4%	3%	48%	-	0%
Can't recall	17%	15%	11%	5%	4%	0%	52%	-	0%

Waiting time estimates were mostly considered very close, or the vehicle actually arrived sooner than estimated. Only small proportions of those given an estimate by either taxis or rideshare services reported the vehicle being longer than estimated.

Sample sizes here are very small for comparison across transport types, or locations. However, in 2022 users of taxis who were given a waiting time were the most likely to report that the taxi arrived earlier than the estimate they had been given.

Figure 75: Last trip – Accuracy of waiting time estimate for ASAP bookings Q53



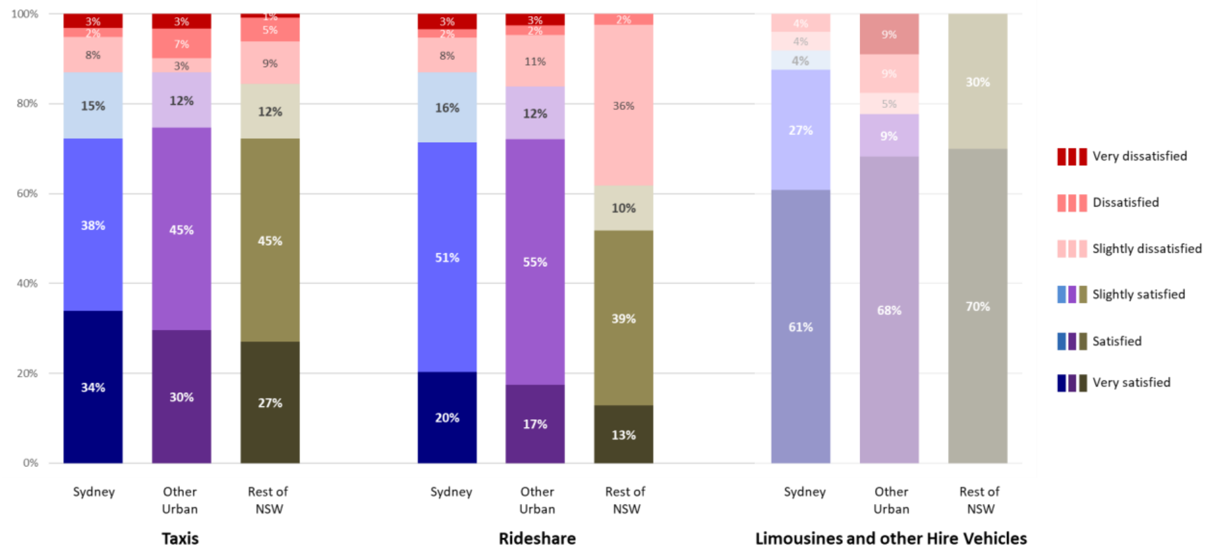
Base = Last trip within last 6 months by ASAP booking and given a waiting time estimate
[Sydney n=78-536; Other Urban n=19-69; Rest of NSW n=22-24]

Satisfaction with waiting times

Satisfaction with waiting times remains generally strong and fairly consistent, above 80% across all locations and types of transport service other than rideshare in the rest of NSW, which dropped to 62% in 2022 (noting that the sample size here each year is quite small).

- Satisfaction with rideshare waiting times was equal to or lower than for taxis in all locations in 2022, reversing the previously observed pattern of results.
- For the most part, overall satisfaction with taxi and rideshare waiting times was quite consistent across locations in 2022 – but the proportion of taxi users who were 'very satisfied' was higher than for rideshare.

Figure 76: Last trip – Satisfaction with waiting time Q54

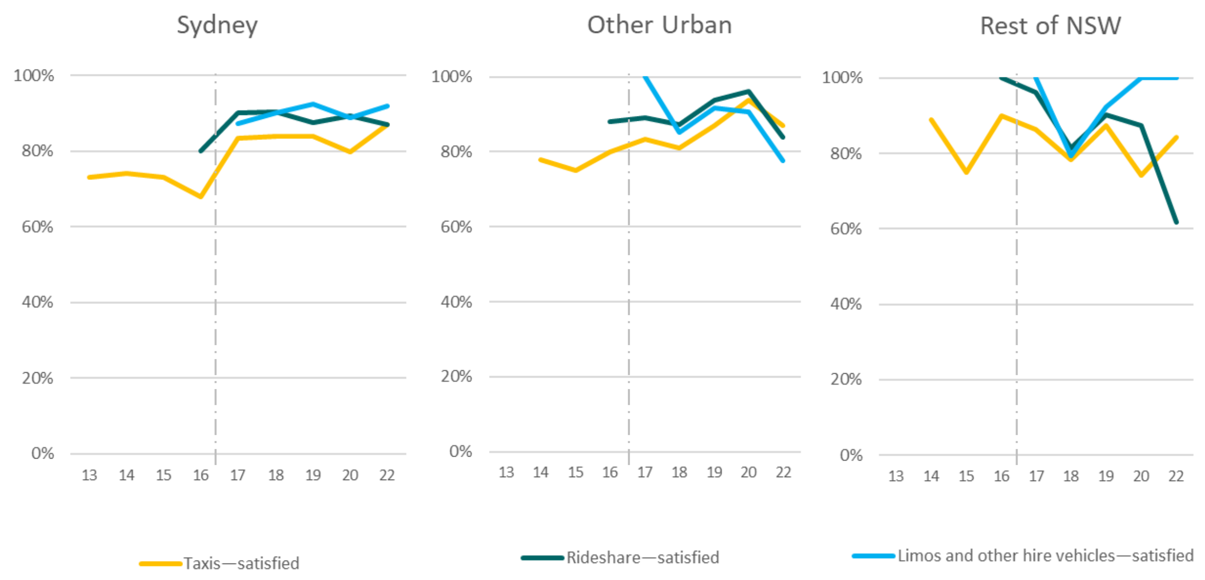


Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Very Satisfied	34%	30%	27%	20%	17%	13%	61%	68%	70%
Satisfied	38%	45%	45%	51%	55%	39%	27%	9%	30%
Slightly satisfied	15%	12%	12%	16%	12%	10%	4%	0%	0%
Total satisfied	**87%**	**87%**	**84%**	**87%**	**84%**	**62%**	**92%**	**78%**	**100%**
Slightly dissatisfied	8%	3%	9%	8%	11%	36%	4%	5%	0%
Dissatisfied	2%	7%	5%	2%	2%	2%	4%	9%	0%
Very dissatisfied	3%	3%	1%	3%	3%	0%	0%	9%	0%
Total dissatisfied	**13%**	**13%**	**16%**	**13%**	**16%**	**38%**	**8%**	**22%**	**0%**

Tracking of waiting time satisfaction shows some variable patterns across transport types and times. The most substantive pattern in the 2022 survey results is that satisfaction with rideshare waiting times dropped in all locations, to the point that it is equal to that for taxis in Sydney and other urban areas (and lower than taxis amongst the smaller rest of NSW sample).

Satisfaction with taxi waiting times has been fairly steady in Sydney and has trended upwards in other urban areas in the five surveys using the new methodology introduced in 2017. In all locations rideshare waiting time satisfaction is lower in 2022 than was seen in 2017 – though not by a large margin in Sydney and other urban areas.

Figure 77: Last trip – Changes in satisfaction with waiting time Q54



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Fares

***Note**: In 2017 this question used the response categories shown below. However, while this encourages more responses by making it easy to answer, it gives less precise data for more sensitive analysis. In 2018 an exact figure (estimate) was introduced. This resulted in a higher level of respondents saying that they were unsure because someone else paid, or that they could not recall, but gives more detailed and likely more reliable data from the remaining respondents. The tables shown below show the full range of responses at the top, and then a summary excluding the 'others paid / can't recall' in the bottom table. For consistency across years, the bottom 'filtered' data is used for comparison.*

As per 2019 and 2020, reported taxi fares in 2022 were again highest in Sydney (likely reflecting longer trips), but rideshare fares were more equal across locations. Only 8% of taxi fares in Sydney were under $20, and 32% were under $40 – both lower than the 15% and 37% respectively seen in 2020. 20% of Sydney rideshare fares were under $20 and 43% were under $40 – also lower than 2020 when they were 31% and 53% respectively.

In other urban areas the sample size is much smaller, but the higher fares seen in Sydney in 2022 were only seen in these areas as somewhat fewer fares under $20.

Figure 78: Last trip – Fares paid Q59
Top table: full responses; Bottom table: Excluding when others paid / can't recall

Last trip – Fares Paid *Full responses, recoded to categories*	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*94*	*32*	*29*	*16*	*6*
Less than $10	0%	2%	7%	1%	3%	5%	0%	0%	0%
At least $10 and less than $20	7%	12%	23%	19%	22%	11%	0%	0%	63%
Less than $20	**8%**	**14%**	**29%**	**20%**	**25%**	**16%**	0%	0%	63%
At least $20 and less than $30	14%	29%	21%	15%	14%	12%	0%	5%	0%
At least $30 and less than $40	11%	6%	3%	9%	4%	9%	0%	0%	0%
Less than $40	**32%**	**49%**	**52%**	**43%**	**44%**	**37%**	0%	5%	63%
At least $40 and less than $60	8%	6%	4%	9%	10%	15%	0%	9%	0%
At least $60 and less than $100	11%	4%	1%	5%	3%	0%	13%	23%	37%
At least $100 and less than $150	4%	0%	4%	2%	0%	0%	15%	0%	0%
$150 or more	2%	2%	1%	0%	0%	0%	10%	25%	0%
$40 or more	**26%**	**12%**	**10%**	**16%**	**12%**	**15%**	38%	57%	37%
I'm not sure because someone else paid	16%	12%	8%	13%	17%	27%	37%	9%	0%
Can't recall	26%	27%	29%	27%	27%	20%	25%	30%	0%

Last trip – Fares Paid ***Excluding:** Other paid / Can't recall*	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
*Sample size (after **excluding** other paid / can't recall)*	*247*	*43*	*50*	*396*	*53*	*17*	*12*	*10*	*6*
Less than $20	**13%**	**23%**	**47%**	**34%**	**44%**	31%	0%	0%	63%
$20 to $40	**42%**	**58%**	**37%**	**39%**	**33%**	40%	0%	8%	0%
$40 or more	**44%**	**19%**	**16%**	**27%**	**22%**	29%	100%	92%	37%

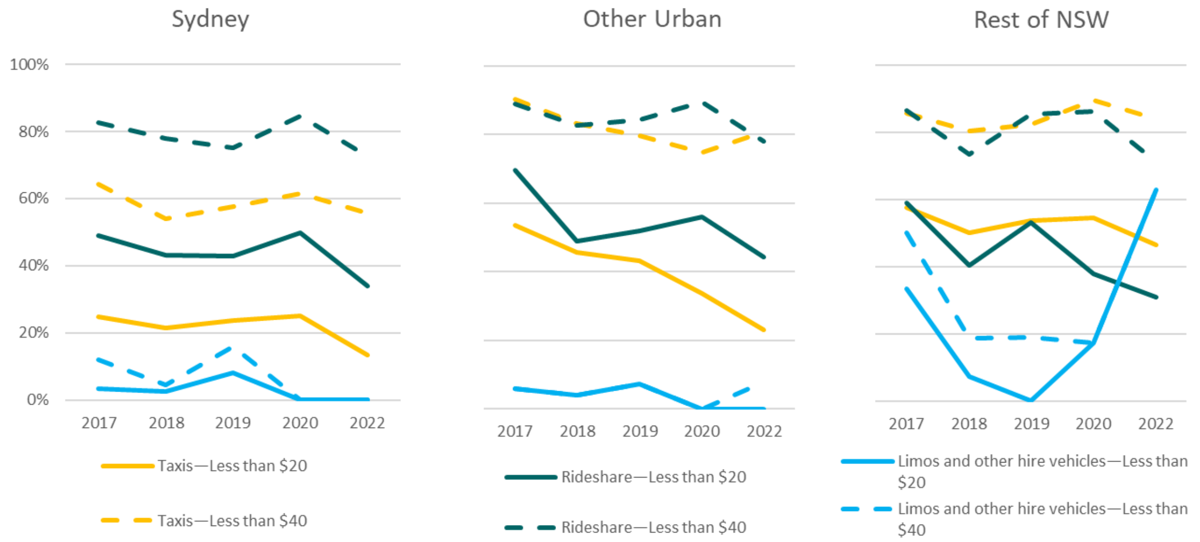
Average fare (mean of exact $ estimates)	**$53**	**$31**	**$33**	**$32**	**$25**	**$32**	$204	$202	$42
Median (i.e. $50 more costly, %50 less costly)	**$35**	**$25**	**$20**	**$25**	**$20**	**$25**	$108	$80	$16

The median fare is less affected by the small number of extremely high fare estimates reported than is the mean / average.

The tracking charts for fares paid shows a spike in less expensive fares in 2020 for rideshare in both Sydney and other urban areas. However, this spike was only seen for taxis in Sydney.

Overall, the tracking shows that the proportion of all fares under $20 (solid lines) and under $40 (dashed lines) have been falling for both main types of point-to-point transport in both locations. They also show that there are a generally greater proportion of rideshare fares under these thresholds than is the case for reported taxi fares.

Figure 79: Last trip – Change in fares paid [Excluding 'others paid / can't recall'] Q59



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Fares for point-to-point transport are of course closely tied to length of trip, and so a further breakdown of fares by distance was examined. Sample sizes are small within individual distance categories, but in Sydney where there were larger total samples a clear pattern can be seen comparing taxi and rideshare fares by estimated length.

Average fare x distance	**Taxis**	**Rideshare**
Mean $ estimate	**Sydney**	**Sydney**
Less than 5 km	$21	$15
5 km to under 10 km	$77	$25
10 km to under 15 km	$43	$35
15 km to under 25 km	$80	$51
25 km to under 50 km	$137	$69
50 km or more	$151	$150
Total Sample	*197*	*442*

This table shows that Sydney users of rideshare services continue to report a lower average fare than users of taxi services for trips of the same approximately estimated length. This pattern has been apparent in previous years and strongly supports (or reinforces) the enduring perception that one of the primary advantages of rideshare compared to taxis is the cost or value proposition.

The detailed breakdown of taxi fares in Sydney (see next page) shows that respondents whose most recent taxi was obtained by hailing or calling a taxi company was somewhat lower than those obtained from ranks or by 'other methods'. This relative pattern of higher and lower fares based on method of obtaining them was also seen in 2019.

Figure 80: Detailed fare paid by methods of obtaining a taxi Q59

Last trip – Fare paid x method	Taxi		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW
Rank Average:	**$93**	**$20**	**$25**
Less than $10	0%	5%	13%
At least $10 and less than $20	8%	11%	33%
At least $20 and less than $30	15%	63%	0%
At least $30 and less than $40	16%	0%	0%
At least $40 and less than $60	10%	0%	4%
At least $60 and less than $100	13%	0%	0%
At least $100 and less than $150	4%	0%	6%
$150 or more	2%	0%	0%
I'm not sure because someone else paid	*10%*	*10%*	*0%*
Can't recall	*23%*	*11%*	*44%*
Sample	112	10	15
Hail Average:	**$53**	**-**	**$16**
Less than $10	1%	0%	0%
At least $10 and less than $20	13%	0%	24%
At least $20 and less than $30	18%	0%	41%
At least $30 and less than $40	11%	0%	0%
At least $40 and less than $60	11%	0%	0%
At least $60 and less than $100	10%	0%	0%
At least $100 and less than $150	1%	0%	0%
$150 or more	3%	0%	0%
I'm not sure because someone else paid	*11%*	*100%*	*0%*
Can't recall	*21%*	*0%*	*35%*
Sample	87	1	3
Called taxi company Average:	**$62**	**$32**	**$21**
Less than $10	0%	0%	7%
At least $10 and less than $20	6%	15%	26%
At least $20 and less than $30	15%	27%	25%
At least $30 and less than $40	6%	6%	5%
At least $40 and less than $60	9%	12%	3%
At least $60 and less than $100	13%	7%	2%
At least $100 and less than $150	3%	0%	0%
$150 or more	1%	0%	0%
I'm not sure because someone else paid	*19%*	*10%*	*15%*
Can't recall	*29%*	*24%*	*17%*
Sample	90	41	45
All other methods Average:	**$56**	**$41**	**$89**
Less than $10	1%	3%	0%
At least $10 and less than $20	4%	10%	0%
At least $20 and less than $30	10%	17%	29%
At least $30 and less than $40	10%	10%	0%
At least $40 and less than $60	5%	0%	6%
At least $60 and less than $100	11%	0%	0%
At least $100 and less than $150	7%	0%	14%
$150 or more	2%	5%	6%
I'm not sure because someone else paid	*24%*	*11%*	*0%*
Can't recall	*29%*	*43%*	*45%*
Sample	126	17	14

Fare estimates

Reported levels of getting fare estimates for hire vehicles is high, but still remains slightly lower than the levels seen for waiting time estimates. Similar rates of fare estimates were seen both in and outside of Sydney, with the 87% in other areas somewhat higher than the 77%-79% in 2019 and 2020.

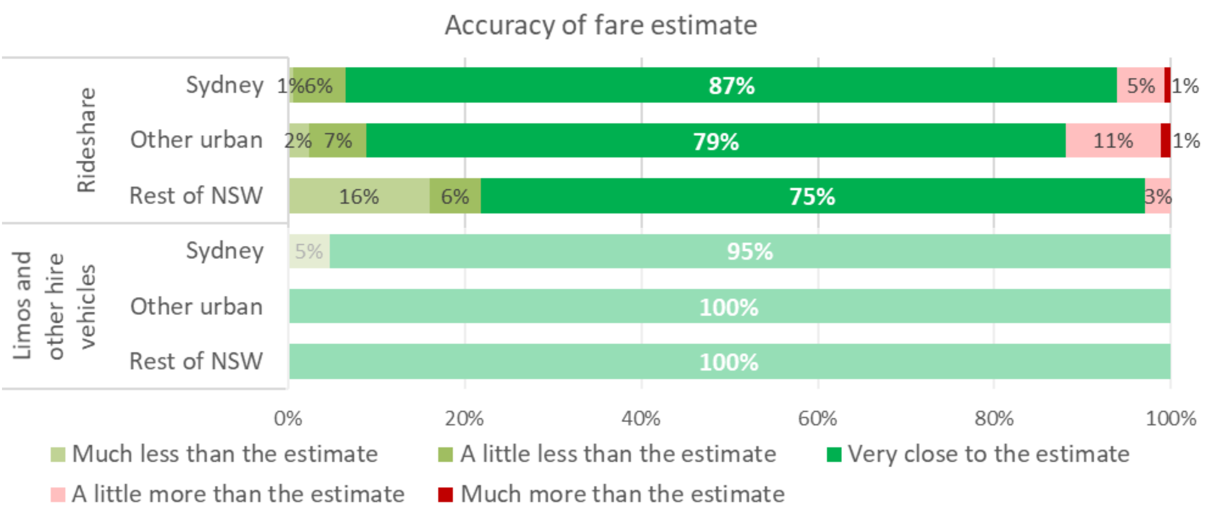
Figure 81: Last trip – Prevalence of being given a fare estimate for hire vehicle bookings Q58

Last trip – Given fare estimate	Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*657*	*95*	*32*	*29*	*16*	*6*
Yes	83%	87%	82%	54%	64%	57%
No	8%	4%	0%	29%	27%	43%
Can't recall	*9%*	*9%*	*18%*	17%	9%	*0%*

While rideshare fare estimates are not quite as common as waiting time estimates, they are still perceived as being more accurate. In Sydney and Other Urban areas there is sufficient sample size for rideshare customers given an estimate to interpret the accuracy results with some confidence. In Sydney 87% customers said the estimate was *very close to the final fare*, the same as 2020. 79% of a smaller number of customers in other urban areas and 75% of those in the rest of NSW said the same thing.

Results are not substantially different from those seen in 2019 and 2020.

Figure 82: Last trip – Accuracy of fare estimate for rideshare and hire vehicle bookings Q60



Base = Last trip within 6 months by rideshare and hire vehicle and given a fare estimate [Sydney n=17-546; Other Urban n=11-79; Rest of NSW n=3-25]

Comparing fares

Just over one-in-four rideshare users indicated that they compared prices for different hire vehicles prior to booking their trip. In Sydney 26% of rideshare users did, compared to 50% of limousine / other hire vehicle users. In Other Urban areas the comparable figures were 28% and 29%*; while in the Rest of NSW they were 36% and 25%*. Sample sizes outside Sydney are too small and variable for confident interpretation of trends, and results are provided as being indicative only.

Comparing prices on the internet or by using apps was the most common method – being used by close to one-fifth of all respondents who had compared prices.

Reasons for not comparing fares in Sydney were almost identical to those reported in 2020, but the proportion who were happy with the price estimate given (51%) is lower than the 57% seen in 2019. In other urban areas the proportion who reported not comparing because they were happy with the price estimate has dropped from 61% in 2019 to 40% in 2022 – significant even within the relatively small sample, and consistent with other results in the survey that suggest rideshare fares are not seen as quite such strong value in 2022.

Figure 83: Last trip – Comparing fares Q56

Last trip – Comparing fares	Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*657*	*95*	*32*	*29*	*16*	*6*
Yes – on the internet or using apps	22%	23%	20%	29%	32%	43%
Yes – by phoning around	3%	3%	16%	4%	4%	0%
Yes – in some other way	2%	2%	0%	8%	9%	0%
No	*73%*	*73%*	*65%*	60%	55%	*57%*

Figure 84: Last trip – Reasons for not comparing fares Q57

Last trip –Reasons for not comparing fares	Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months AND did not compare fares before trip	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*484*	*69*	*26*	*18*	*8*	*4*
I always use that provider or service	49%	44%	35%	47%	35%	75%
I was happy with the price estimate I was given	51%	40%	49%	36%	56%	59%
Some other reason	10%	19%	16%	25%	9%	0%

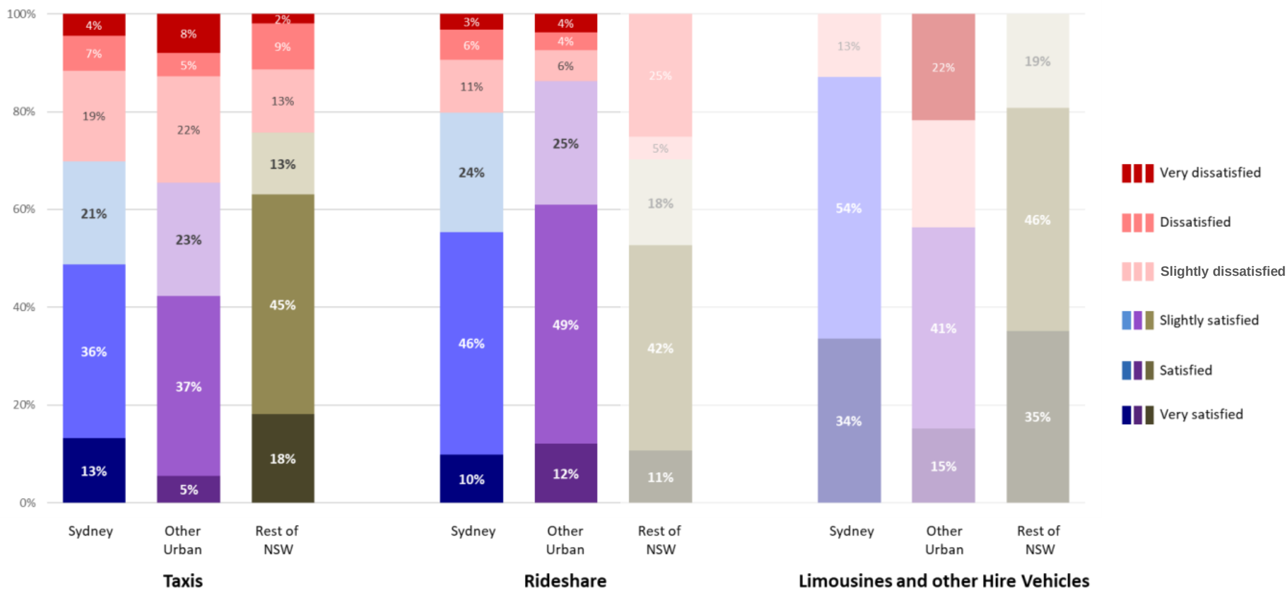
Satisfaction with fares

Consistent with perceptions of the relative cost and value of taxis and rideshare services in general, users of rideshare services are usually much more satisfied with the fare they paid for their last trip than are users of taxis, and this pattern remains evident in 2022. However, also consistent with a pattern in the 2022 survey for rideshare to be seen as slightly less good value than in previous surveys, satisfaction with rideshare fares is slightly lower compared to previous surveys; while satisfaction of taxi users with fares is somewhat higher.

65%-76% of users of taxis considered themselves *at least slightly satisfied*, compared to 56%-68% in 2020. For rideshare, the equivalent figures were 80%-86%, compared to 84%-91%. The proportion of taxi users who said they were *dissatisfied* or *very dissatisfied* remains higher than for rideshare.

There was a greater difference in fare satisfaction between rideshare and taxi users in other urban areas than there was in Sydney.

Figure 85: Last trip – Satisfaction with fares (if aware of amount) Q61

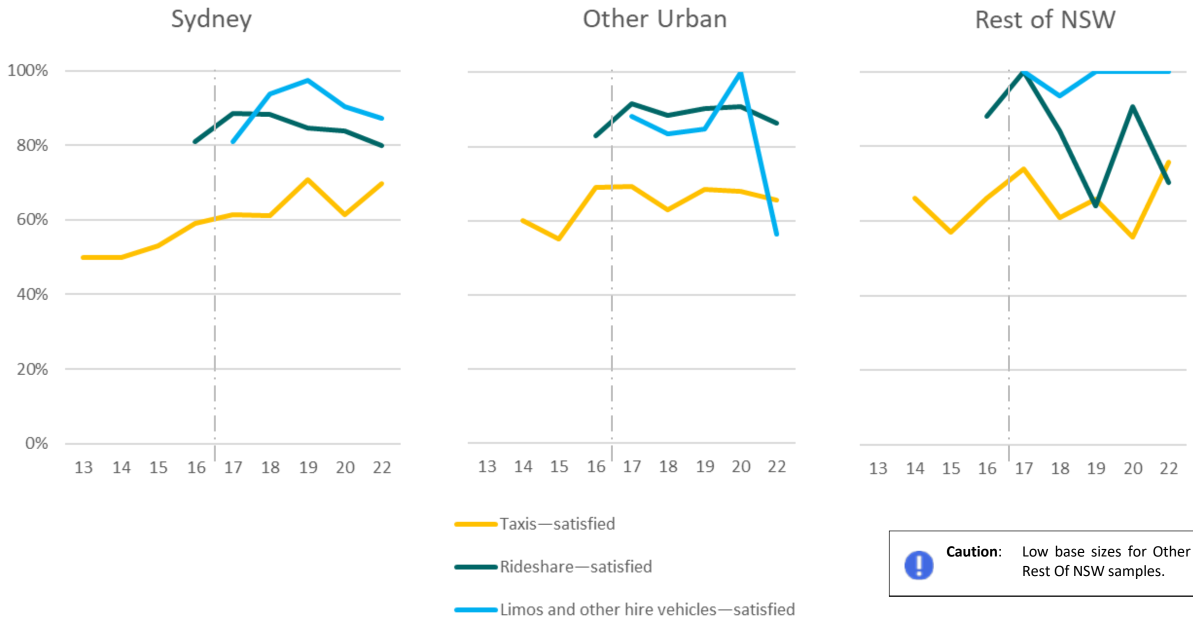


Last trip – Satisfaction with fares	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*247*	*43*	*50*	*396*	*54*	*17*	*12*	*10*	*6*
Very Satisfied	13%	5%	18%	10%	12%	11%	34%	15%	35%
Satisfied	36%	37%	45%	46%	49%	42%	54%	41%	46%
Slightly satisfied	21%	23%	13%	24%	25%	18%	0%	0%	19%
Total satisfied	**70%**	**65%**	**76%**	**80%**	**86%**	**70%**	**87%**	**56%**	**100%**
Slightly dissatisfied	19%	22%	13%	11%	6%	5%	13%	22%	0%
Dissatisfied	7%	5%	9%	6%	4%	25%	0%	0%	0%
Very dissatisfied	4%	8%	2%	3%	4%	0%	0%	22%	0%
Total dissatisfied	**30%**	**35%**	**24%**	**20%**	**14%**	**30%**	**13%**	**44%**	**0%**

Satisfaction with taxi fares in Sydney has trended somewhat higher in the five years of the new survey methodology, while satisfaction with rideshare fares has fallen slightly. Despite this narrowing, satisfaction with rideshare fares remains clearly higher.

In other urban areas the gap between satisfaction with rideshare and taxi fares has remained consistent over the same timeframe, with both trending very slightly downwards.

Figure 86: Last trip – Change in satisfaction with fares (if aware of amount) Q61



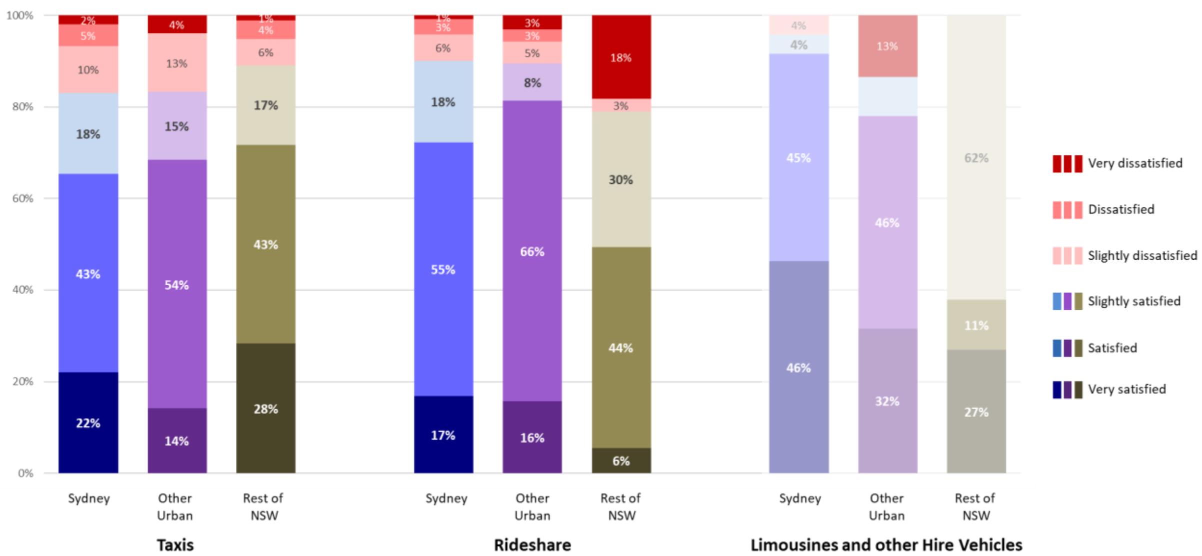
Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Overall Trip Satisfaction

Overall trip satisfaction remains high amongst users, across all locations and service types. In every combination, even where small samples were available, at least 4-in-5 respondents indicated they were *at least slightly satisfied* in 2022. This suggests that overall, the point-to-point transport service in NSW is largely meeting the needs and expectations of people who successfully access it.

- Satisfaction is highest for rideshare in 2022, and slightly lower for taxis – except in the rest of NSW where fewer rideshare users were satisfied in the current survey.
- There is little differentiation in satisfaction by areas, but if anything it is slightly lower in Sydney than in Other Urban areas. The biggest different in services by location was in the rest of NSW, where the lower rideshare satisfaction in 2022 is an unusual result (noting that this segment always has low sample sizes).

Figure 87: Last trip – Overall Satisfaction with last trip Q62

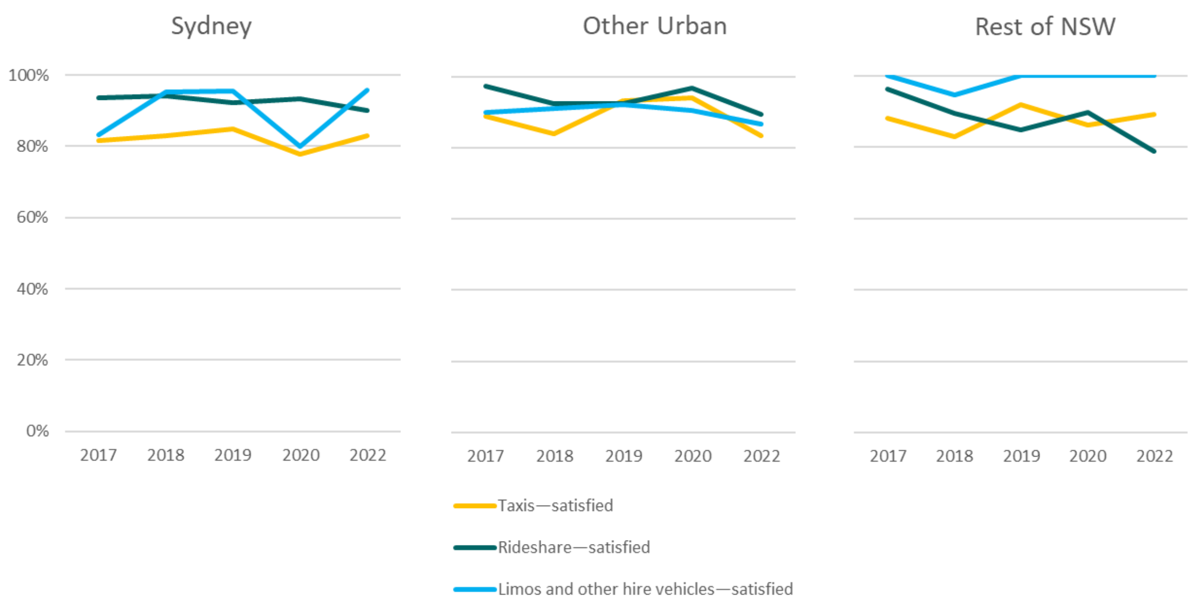


Last trip – Overall satisfaction	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Very Satisfied	22%	14%	28%	17%	16%	6%	46%	32%	27%
Satisfied	43%	54%	43%	55%	66%	44%	45%	46%	11%
Slightly satisfied	18%	15%	17%	18%	8%	30%	4%	9%	62%
Total satisfied	**83%**	**83%**	**89%**	**90%**	**89%**	**79%**	**96%**	**87%**	**100%**
Slightly dissatisfied	10%	13%	6%	6%	5%	3%	4%	0%	0%
Dissatisfied	5%	0%	4%	3%	3%	0%	0%	0%	0%
Very dissatisfied	2%	4%	1%	1%	3%	18%	0%	13%	0%
Total dissatisfied	**17%**	**17%**	**11%**	**10%**	**11%**	**21%**	**4%**	**13%**	**0%**

Overall last trip satisfaction has generally shown a small advantage for rideshare over taxis in all locations, and this remains the case in Sydney and other urban areas in 2022 – though only to a small extent.

- In Sydney, overall last trip satisfaction with both taxis and rideshare has remained quite stable in the five years of the current survey methodology. From 2017-2019 the gap in satisfaction between taxis and rideshare narrowed slightly, before increasing in 2020 (when COVID seemed to impact taxi use more so than rideshare use). However in 2022 the gap closed again, with results very similar to those seen in 2019.
- In Other Urban areas, respondents have given very similar satisfaction ratings for all three services in each survey. Rideshare satisfaction has consistently been very slightly higher than taxis, and this is still the case in 2022, though satisfaction with both services fell from 2020.
- Sample sizes in the Rest of NSW are too small for any detailed analysis, but the overall pattern suggests satisfaction levels are reasonably similar between taxis and rideshare.

Figure 88: Last trip – Change in overall Satisfaction with last trip Q62



COVID Considerations

In 2020 a number of additional questions were included in the last trip section of the survey, specifically relating to COVID considerations, and these were retained for the 2022 survey. In general, perceptions were still higher outside of Sydney, and for rideshare services compared to taxis – but both differences were much smaller than in 2020.

Confidence when using

Around half of all users of taxis and rideshare services in all locations were *totally or very confident* in using this type of transport in a COVID-environment when taking their last trip – and no more than 1-in-10 were *not very or not at all confident*. Confidence in using rideshare services was consistent with 2020, but confidence in using taxis was higher in Sydney in 2022 (50%) than in 2020 (37%).

Figure 89: Last trip – Confidence using in a COVID environment Q62A

Last trip –Confidence using in a COVID environment	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Totally confident	21%	19%	21%	17%	30%	33%	39%	48%	35%
Very confident	29%	33%	30%	32%	32%	22%	33%	34%	46%
Totally + very confident	**50%**	**53%**	**51%**	**49%**	**63%**	**55%**	**73%**	**82%**	**81%**
Somewhat confident	39%	46%	40%	43%	31%	36%	11%	10%	19%
Not very confident	10%	2%	7%	8%	6%	5%	9%	9%	0%
Not at all confident	1%	0%	2%	0%	0%	4%	8%	0%	0%
Not very + Not at all confident	**11%**	**2%**	**9%**	**8%**	**6%**	**9%**	**16%**	**9%**	**0%**

Cleanliness and sanitising

No more than 5% of point-to-point transport users rated the cleanliness and sanitisation of their last trip vehicle as *unacceptable* from a COVID perspective. The proportion of *good* ratings for taxis in Sydney increased from 33% in 2020 to 45% in 2022, while the ratio of *good* to *acceptable* ratings remained fairly consistent for taxis outside of Sydney and for rideshare in all locations.

Figure 90: Last trip – Perceptions of cleanliness and sanitising Q62B_1

Last trip – cleanliness and sanitising	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Good	45%	45%	46%	50%	66%	53%	66%	77%	66%
Acceptable	51%	55%	52%	47%	33%	47%	34%	23%	34%
Unacceptable	**5%**	**0%**	**2%**	**3%**	**1%**	**0%**	**0%**	**0%**	**0%**

Maintaining social distancing

Similarly, and consistent with 2020, very few users of point-to-point transport rated the maintenance of social distancing on their last trip as *unacceptable* (0%-4%) – but also consistent with 2020, generally only around half rated it as *good*. The tendency for rideshare to score higher was still seen, but again taxis in Sydney were the only place to show a substantive increase (from 40% to 48% *good*).

Figure 91: Last trip – Perceptions of maintaining social distancing Q62B_2

Last trip – maintaining social distance	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Good	48%	45%	49%	53%	60%	51%	64%	69%	38%
Acceptable	50%	51%	48%	44%	36%	49%	27%	31%	62%
Unacceptable	**3%**	**4%**	**3%**	**3%**	**4%**	**0%**	**9%**	**0%**	**0%**

Use of masks

Use of masks was moderately common at the time of last trips in 2020 (noting that these could have been up to six months prior to the survey and rules or expectations about mask use varied across this time).

Reported mask use was dramatically higher in the 2022 survey compared to 2020. In 2020 respondents reported that rideshare drivers were much more likely to have worn a mask, especially outside of Sydney. In 2022, while taxi users reported slightly less use of masks compared to rideshare, this was only to a small extent, and the great majority of respondents reported masks being used by both drivers and passengers.

Figure 92: Last trip – Use of masks Q62C/D

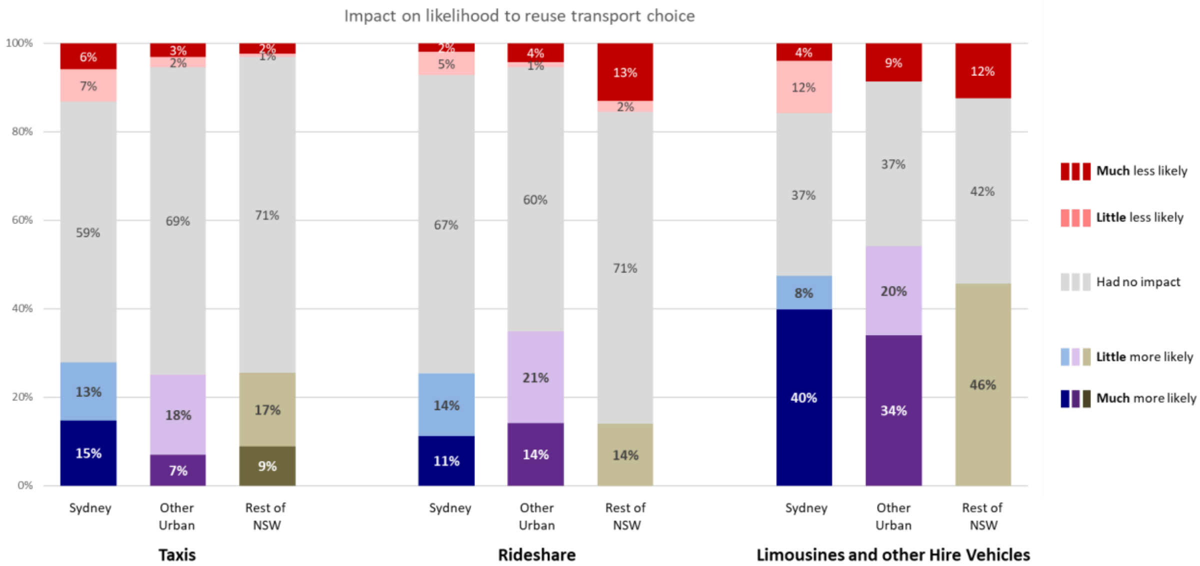
Last trip – use of masks	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Driver wore a mask	85%	88%	88%	92%	89%	97%	91%	87%	66%
Respondent wore a mask	86%	77%	79%	89%	81%	85%	74%	73%	89%
If wore mask – had own	97%	95%	98%	98%	96%	97%	94%	82%	86%
If wore mask – driver provided	2%	2%	2%	1%	3%	0%	6%	18%	14%
All other passengers wore a mask *Excludes 'not applicable'*	83%	76%	76%	88%	79%	81%	68%	62%	100%

Impact on intended use

Prior to 2020, across all transport services and locations, there was a nett positive differential impact on likelihood to re-use transport services again in the future. That is, at least as many respondents said the experience made them *more* likely to re-use a service as those who said it made them *less* likely to do so. Rideshare has had a considerably higher nett differential than taxis, though this was reduced in 2020.

In 2022 taxi nett differentials were around the most positive they have been in the last five years in all locations (+15% to +20%). Rideshare nett differentials were slightly more positive than taxis in Sydney and other urban areas, but lower in the rest of NSW, and lower than seen in any previous survey other than 2020.

Figure 93: Last trip – Impact on likelihood to re-use the transport service again Q63



Last trip – Impact on using again	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*415*	*69*	*77*	*657*	*95*	*32*	*29*	*16*	*6*
Much more likely to use it again	15%	7%	9%	11%	14%	0%	40%	34%	0%
A little more likely to use it again	13%	18%	17%	14%	21%	14%	8%	20%	46%
Total more likely to re-use	**28%**	**25%**	**26%**	**25%**	**35%**	**14%**	**47%**	**54%**	**46%**
Had no impact	59%	69%	71%	67%	60%	71%	37%	37%	42%
A little less likely to use it again	7%	2%	1%	5%	1%	2%	12%	0%	0%
Much less likely to use it again	6%	3%	2%	2%	4%	13%	4%	9%	12%
Total less likely to re-use	**13%**	**5%**	**3%**	**7%**	**5%**	**16%**	**16%**	**9%**	**12%**
Differential impact (More likely minus less likely)	**+15%**	**+20%**	**+22%**	**+18%**	**+29%**	**-2%**	**+32%**	**+45%**	**+33%**

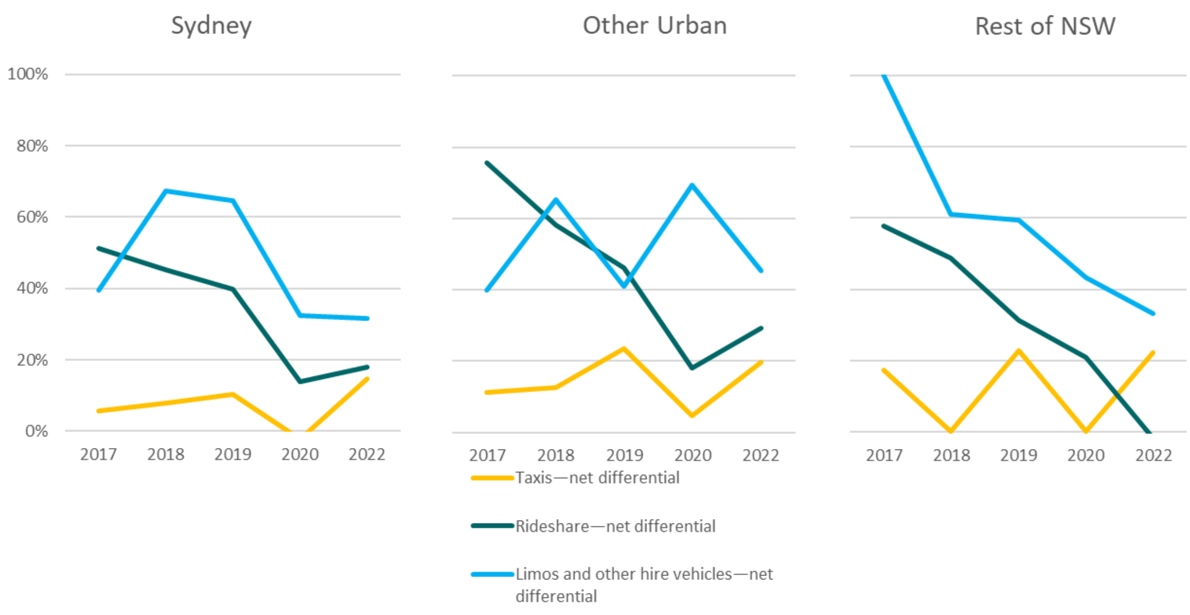
The charts tracking the nett differential in terms of impact on likelihood to re-use a form of point-to-point transport shows quite different patterns for each service type.

As the most mature service, it would be expected that each experience of using taxis would have less impact on expectations to re-use, and this is what is observed. Across all locations there has generally been a slightly positive nett differential for taxis, but limited to up to about +20%. In 2022, these nett differentials are as positive as have been observed though, which is consistent with the generally slightly higher ratings seen for taxis across the 2022 survey.

For rideshare, a very different pattern has been apparent. As the least established service, individual experiences are likely to have a greater impact on future intentions. As perceptions of rideshare have also been strong in the past four surveys, this has translated to a higher nett positive differential – but one that has been diminishing as users become more familiar and the service becomes more mature. Satisfaction with rideshare has remained strong, and mostly stronger than taxis, but has been slowly diminishing. The combination of these two influences results in the nett differentials for rideshare becoming lower overall.

Use of and perceptions of limousines and other hire vehicles are subject to the fluctuations of lower use, and are harder to interpret. Nett differentials amongst users remain positive and relatively large, but increasingly less so.

Figure 94: Last trip – Change in impact on likelihood to re-use the transport service again Q63



G. Impact of COVID on point-to-point transport

The COVID-19 pandemic has been the defining event of 2020-21-22, and the 2020 point-to-point transport survey confirmed that usage and expectations of usage of such transport services has been substantially reduced. The 2020 survey showed a larger impact on use of taxi services than on rideshare services, but that while *volumes* of use reduced, *patterns* of use were not that different.

Two new questions were introduced in the 2020 survey to explicitly explore the impact of COVID on the likelihood and confidence to use point-to-point transport services, and were repeated in 2022. Unsurprisingly, both indicators show a substantial (and similar) nett negative impact across both years.

Across all locations and transport types, the nett differential for likelihood of use was between -21% and -31% in 2022, compared to between -20% and -35% in 2020. The range for confidence in 2022 was -17% to -27%, compared to -22% to -32% in 2020. Overall, it seems that the negative impact is very slightly less in 2022 than it was in 2020 – but *only* very slightly.

Perceptions of impact on use and confidence is slightly less negative in Sydney in 2022, but the changes are less consistent outside of Sydney.

Figure 95: Perceived impact of COVID-19 (new questions) Q77

Impact of COVID-19 on: **Your likelihood of using**	Taxis			Rideshare			Limousines or other hire vehicles		
Base: All respondents	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*2070*	*541*	*412*	*2070*	*541*	*412*	*2070*	*541*	*412*
Higher	8%	5%	6%	10%	8%	4%	5%	4%	5%
Same	53%	58%	62%	55%	58%	65%	63%	64%	68%
Lower	39%	37%	32%	34%	34%	31%	32%	32%	27%
Differential Higher *minus* lower	**-31%**	**-31%**	**-26%**	**-24%**	**-27%**	**-28%**	**-27%**	**-29%**	**-21%**

Impact of COVID-19 on: **Your confidence in using**	Taxis			Rideshare			Limousines or other hire vehicles		
Base: All respondents	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*2070*	*541*	*412*	*2070*	*541*	*412*	*2070*	*541*	*412*
Higher	7%	4%	6%	9%	5%	3%	6%	5%	5%
Same	63%	68%	70%	63%	65%	67%	68%	70%	72%
Lower	30%	28%	24%	28%	30%	30%	26%	26%	23%
Differential Higher *minus* lower	**-23%**	**-24%**	**-17%**	**-20%**	**-26%**	**-27%**	**-20%**	**-21%**	**-18%**

H. Awareness of Regulatory Changes

Respondents have limited awareness of rules and regulations that apply to point-to-point transport. Across the three regions 59%-67% were unaware of any of the current rules they were asked about, with no more than 20% in any location aware of any specific rule or regulation. Only 5%-7% in any location had heard that the NSW Government has announced it will shortly stop regulating the number of taxi licences and taxi fares, though another 8%-16% thought that they had heard something about changes being planned, without knowing the details.

Figure 96: Awareness of rules and regulations that apply to point-to-point transport Q70

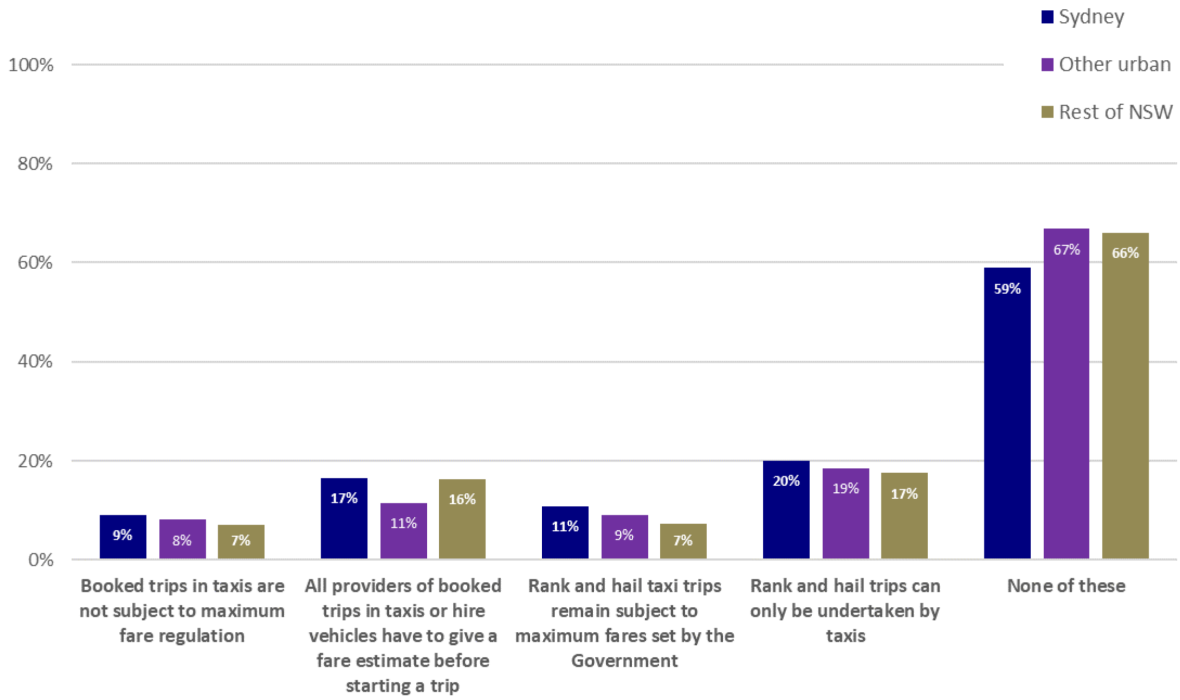
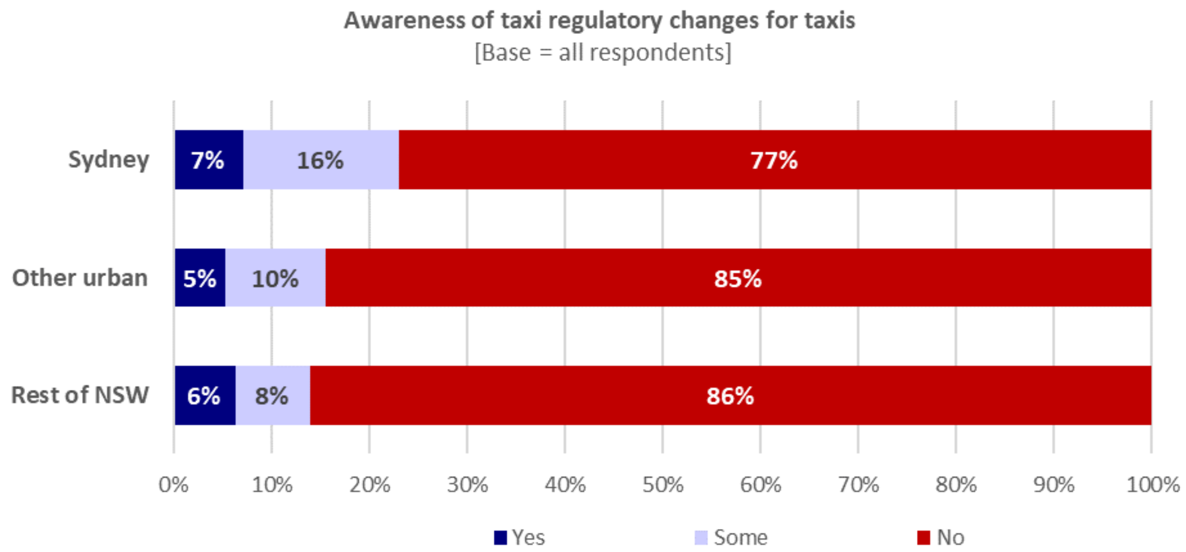


Figure 97: Awareness that the NSW Government intends to stop regulating taxi licences and fares Q69



Base = all respondents [Sydney n=2,070; Other Urban n=541; Rest of NSW n=412]

Appendix A: Questionnaire

INTRODUCTORY TEXT

Who is conducting the survey?

This research is being conducted for the NSW Government by ORIMA Research and the ORU.

How long will the survey take?

This survey should take around 10 minutes to complete (depending on what comments you include when invited to provide additional information).

Is my participation voluntary?

Participation in this research is voluntary. You can choose not to answer any question. You can decide to stop at any time.

Is my confidentiality and information privacy ensured?

The information you provide will be treated as private and confidential. No individual will be able to be identified from the research results. Your answers will only be used for the purposes of the research.

At any time during or after the survey, you can ask that the information you provided not be used by ORIMA Research.

PART 1: QUOTA DEMOGRAPHICS

1. **What is your gender?**
   (1) Male
   (2) Female
   (3) Other
   (4) Prefer not to say

2. **Which age group are you in?**
   (1) Under 16 TERMINATE
   (2) 16 to19
   (3) 20 to 29
   (4) 30 to 39
   (5) 40 to 49
   (6) 50 to 59
   (7) 60 to 69
   (8) 70 to 79
   (9) 80 and over

3. **What is the postcode where you live?**

NUMERIC (4 DIGITS ONLY)

Use postcode to set [LOCATION] variable to Sydney, Wollongong, Newcastle, Gosford or Wyong, or "your local region".

4. **Which of these describe you?** ***Please select all that apply***

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

PART 2: AWARENESS AND USAGE OF SERVICES

This survey is about a range of transport options that you may use in [LOCATION].

ASK ALL

5. A "**taxi"** is a vehicle clearly marked as a taxi and with a TAXI or CAB sign on its roof. Are you aware of **taxis** operating in [LOCATION]?
   (1) Yes
   (2) No
   (3) Unsure

ASK IF AWARE OF TAXIS (IE: Q5 = 1)

6. When was the last time you used a **taxi** in [LOCATION]?
   (1) In the last 6 months
   (2) 7-12 months ago
   (3) Longer ago
   (4) Never
   (5) Can't recall

ASK ALL

7. Overall, [INSERT IF Q6=4-5 "even if you don't use the service"], how satisfied or dissatisfied are you with the **taxi** service in [LOCATION]?
   (1) Very satisfied
   (2) Satisfied
   (3) Neither satisfied nor dissatisfied
   (4) Dissatisfied
   (5) Very dissatisfied
   (6) Don't know

ASK ALL

There are several types of "**hire vehicle services"** that operate in NSW. Hire vehicle services **do not** include taxis, or rental cars that you can drive yourself. Hire vehicle services provide a passenger service to transport you by a motor vehicle from one point to another for the payment of a fare. They include rideshare services, limousines and other hire vehicle services such as airport shuttles in smaller vehicles.

8. Are you aware of any of the following types of **hire vehicle** services operating in [LOCATION]?

		Yes	No	Unsure
A	**Rideshare** services like Uber, Shebah, Ola or Didi	1	2	3
B	**Limousines** or **other hire vehicle services**	1	2	3

ASK IF AWARE OF ANY IN Q8 / SHOW ONLY THOSE AWARE OF IN Q8

9. When was the last time you used any of the following types of **hire vehicle** services in [LOCATION]?

		In the last 6 months	7-12 months ago	Longer ago	Never	Can't recall
A	**Rideshare service** (eg: Uber, Shebah, Ola or Didi)	1	2	3	4	5
B	**Limousines** or **other hire vehicle service**	1	2	3	4	5

ASK ALL

10. Across these different types of **hire vehicle** services – overall [INSERT IF Q9A OR B=4-5 ", even if you don't use this type of service,"] how satisfied or dissatisfied are you with the service in [LOCATION]?

		Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Don't know
A	**Rideshare** services (eg: Uber, Shebah, Ola or Didi)	1	2	3	4	5	6
B	**Limousines** or **other hire vehicles service**	1	2	3	4	5	6

ASK ALL

There are several <u>other</u> types of **transport services** that are available in some parts of NSW. These types of transport are **not** considered 'hire vehicles'.

11. Are you aware of any of the following types of **transport services** operating in [LOCATION]?

		Yes	No	Unsure
A	**Community transport** - government-subsidised door to door transport available to eligible people experiencing transport disadvantage. A user charge generally applies.	1	2	3
B	**Courtesy Transport** - transport provided by pubs, clubs or community organisations (eg, Lions, Rotary and churches) which is free of charge.	1	2	3
C	**Car share** – a membership based service where people can rent vehicles to drive themselves for short periods of time (e.g. GoGet, Car Next Door, Flexicar, Popcar).	1	2	3
D	**Bikeshare** – where you can make short-term use of push-bikes, either for free or for a small cost	1	2	3

ASK IF AWARE OF ANY IN Q11 / SHOW ONLY THOSE AWARE OF [Q11 = 1]

12. When was the last time you used any of the following types of **transport services** in [LOCATION]?

		In the last 6 months	7-12 months ago	Longer ago	Never	Can't recall
A	**Community transport** - government-subsidised door to door transport available to eligible people experiencing transport disadvantage. A user charge generally applies.	1	2	3	4	5
B	**Courtesy Transport** - transport provided by pubs, clubs or community organisations (eg, Lions, Rotary and churches) which is free of charge.	1	2	3	4	5
C	**Car share** – a membership based service where people can rent vehicles to drive themselves for short periods of time (e.g. GoGet, Car Next Door, Flexicar, Popcar).	1	2	3	4	5
D	**Bikeshare** – where you can make short-term use of push-bikes, either for free or for a small cost	1	2	3	4	5

ASK IF USED TAXIS (Q6=1) OR ANY FORM OF HIRE VEHICLE (Q9A OR B=1)

SHOW ONLY TYPES OF TRANSPORT USED IN THE LAST 6 MONTHS

13. In the last 6 months, on average how many times have you used these types of transport to get around [LOCATION]?

		6 or more times per week	3-5 times per week	1-2 times per week	2-3 times per month	Once every month	Less often	Can't say
A	**Taxis**	1	2	3	4	5	6	7
B	**Rideshare services** (eg: Uber, Shebah, Ola or Didi)	1	2	3	4	5	6	7
C	**Limousines** or **other hire vehicle services**	1	2	3	4	5	6	7

ASK ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

14. In the last 6 months, have you had any experiences where you **tried to use** these types of transport services in [LOCATION] but were **not able to**?

		Yes	No
A	**Taxis**	1	2
B	**Rideshare services** (eg: Uber, Shebah, Ola or Didi)	1	2
C	**Limousines** or **other hire vehicle services**	1	2

ASK IF YES TO ANY IN Q14 / SHOW ONLY OPTIONS WITH CODE 1 IN Q14

15. On the last occasion you were unable to use [INSERT APPROPRIATE TEXT: “a taxi” OR “a rideshare service” OR “a limousine or other hire vehicle service” OR “a taxi or rideshare service” OR “a taxi or a limousine or other hire vehicle service” OR “a rideshare service, limousine or other hire vehicle service” OR “a taxi, rideshare service, limousine or other hire vehicle service”] what did you do instead? *Please select all that apply*

MULTIPLE RESPONSE

	A	B	C
	The last time you couldn’t use a **taxi**	The last time you couldn’t use a **rideshare service**	The last time you couldn’t use a **limousine or other hire vehicle service**
Decided not to make the journey at all	1	1	1
Took a train	2	2	2
Took a regular bus (ie, not a courtesy bus)	3	3	3
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	4	4	4
Used courtesy transport provided by a venue such as a pub or club	5	5	5
Drove myself or got a lift	6	6	6
Used a rideshare service instead	7	7	7
Used a limousine or other hire vehicle service	8	8	8
Used a taxi instead	9	9	9
Walked or cycled	10	10	10
Used a bikeshare service	14	14	14
Used a car sharing service such as GoGet or Car Next Door, Flexicar, Popcar	11	11	11
Something else	12	12	12
Can’t recall	13	13	13

** **NOTE**: PEOPLE WHO ARE NOT AWARE OF TAXI [Q5=2-3] / HV SERVICES [Q9A AND B = 2-3] OR WHO HAVE NEVER USED THEM [Q6=4-5 AND Q9A AND B =4-5]: SKIP FROM HERE TO q20/21; AND THEN TO PART 4 (WORKPLACE POLICIES, Q32-33-34); AND THEN TO PART 6 (STRENGTHS AND WEAKENESSES, Q64 OWNARDS)**

PART 3: TAXIS AND HIRE VEHICLES GENERALLY

SHOW ONLY TYPES OF TRANSPORT EVER USED [Q6=1-3 or Q9A or B=1-3]

16. For each of the following – to get around [LOCATION] in the last 12 months, have you:

		Used them **more** than in the previous 12 months	Used them about the **same**	Used them **less** than in the previous 12 months	Can't say
A	**Taxis**	1	2	3	4
B	**Rideshare** services (eg: Uber, Shebah, Ola or Didi)	1	2	3	4
C	**Limousines** or **other hire vehicle services**	1	2	3	4

SHOW IF EVER USED TAXIS (Q6=1-3) AND USED HVs IN LAST 6 MONTHS (either Q9A OR B=1)

17. As a result of using [INSERT APPROPRIATE TEXT: "rideshare services" OR "limousines or other hire vehicle services" OR "rideshare services, limousines or other hire vehicle services", do you use **taxis** to get around [LOCATION]…
    (1) Not at all any more
    (2) A lot less
    (3) A little less
    (4) About as frequently as before
    (5) More

ASK IF USED TAXIS OR HIRE VEHICLES MORE OFTEN IN THE LAST 12 MONTHS (Q16A/B/C=1)

18. You said you have used [INSERT APPROPRIATE TEXT: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"] more often in the last 12 months than the previous 12 months to get around [LOCATION]. Why is that? *Please select all that apply*

MULTIPLE RESPONSES ALLOWED / SHOW ONLY OPTIONS USED MORE IN Q16 [IE: CODE 1]

	A	B	C
	Why have you used **taxis** more often in the last 12 months	Why have you used **rideshare services** more often in the last 12 months	Why have you used **limousines or other hire vehicles** more often in the last 12 months
I find them less expensive than before	1	1	1
I have more disposable income	2	2	2
I'm going out more / needing to get around more	3	3	3
Because I don't have to wait as long to catch one, or I think one is more likely to turn up after I have booked it	4	4	4
I have less access to alternatives	5	5	5
Because the service for booking taxis over the phone has improved	6	6	6
Because it has become easier to book taxis with apps than it was	7	7	7
Because the service for booking is better than it used to be	8	8	8
I think drivers have become less inclined to take longer routes or overcharge me	9	9	9
Because I get a fare estimate quoted in advance	10	10	10
I have found that driver behaviour and knowledge has improved in [LOCATION, IF NOT A SPECIFIED CITY INSERT "my local region"]	11	11	11
Because they were not available previously or I did not know about them before then	12	12	12
Because of things related to COVID	14	14	14
For another reason	13	13	13

ASK IF USED TAXIS OR HIRE VEHICLES MORE OFTEN IN THE LAST 12 MONTHS (Q16A/B/C=1)

18a. To what extent is your increased use of [INSERT APPROPRIATE TEXT: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"] to get around [LOCATION] in the last 12 months due to the impact of things related to COVID?

	A	B	C
	Taxis	**Rideshare services**	**Limousines or other hire vehicles**
Completely related to COVID	1	1	1
Mostly	2	2	2
Somewhat	3	3	3
Not very much	4	4	4
Not at all related to COVID	5	5	5

ASK IF USED TAXIS OR HIRE VEHICLES LESS OFTEN IN THE LAST 12 MONTHS (Q16A/B/C=3)

19. You said you have used [INSERT APPROPRIATE TEXT: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"] less often in the last 12 months than the previous 12 months to get around [LOCATION]. Why is that? *Please select all that apply*

MULTIPLE RESPONSES ALLOWED / SHOW ONLY OPTIONS USED LESS IN Q16

	A	B	C
	Why have you used **taxis** less often in the last 12 months	Why have you used **rideshare services** less often in the last 12 months	Why have you used **limousines or other hire vehicles** less often in the last 12 months
I find them more expensive than before	1	1	1
I have less disposable income	2	2	2
Because peak or surge pricing makes them too expensive	3	3	3
I'm going out less / have less need to get around	4	4	4
Because I find I have to wait longer than I used to catch a one, or I can't rely on one turning up after I have booked it	5	5	5
I have better access to a car	6	6	6
Public transport has improved when I need it	7	7	7
I use taxis instead	8	8	8
I use limousine or other hire vehicle services instead	9	9	9
I use rideshare services instead	10	10	10
I use car share, community transport or courtesy buses instead	11	11	11
Because booking services have become worse	12	12	12
I think drivers have become more inclined to take longer routes or overcharge me	13	13	13
I have found that driver behaviour and knowledge has become worse in [LOCATION, IF NOT A SPECIFIED CITY INSERT "my local region"]	14	14	14
Because of things related to COVID	16	16	16
For another reason	15	15	15

ASK IF USED TAXIS OR HIRE VEHICLES LESS OFTEN IN THE LAST 12 MONTHS (Q16A/B/C=3)

19a. To what extent is your lower use of [INSERT APPROPRIATE TEXT: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"] to get around [LOCATION] in the last 12 months due to the impact of things related to COVID?

	A	B	C
	Taxis	**Rideshare services**	**Limousines or other hire vehicles**
Completely related to COVID	1	1	1
Mostly	2	2	2
Somewhat	3	3	3
Not very much	4	4	4
Not at all related to COVID	5	5	5

ASK Q20/21 FOR ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

20. What do you think of the **value for money** for fares to use [INSERT APPROPRIATE TEXT OPTION: "taxis" OR "rideshare services" OR "limousines or other hire vehicle services" OR "taxis or rideshare services" OR "rideshare services, limousines or other hire vehicle services" OR "taxis, rideshare services, limousines or other hire vehicle services"] in [LOCATION]?

SHOW OPTIONS AWARE OF / SHOW ALL ON ONE SCREEN

		Value of **taxis**			
		Good	OK	Poor	Can't say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

		Value of **rideshare** services (eg: Uber, Shebah, Ola, Didi)			
		Good	OK	Poor	Can't say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

		Value of **limousines** or **other hire vehicle services**			
		Good	OK	Poor	Can't say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

21. What do you think of the **value for money** for fares to use [INSERT APPROPRIATE TEXT OPTION: "taxis" OR "rideshare services" OR "limousines or other hire vehicle services" OR "taxis or rideshare services" OR "rideshare services, limousines or other hire vehicle services" OR "taxis, rideshare services, limousines or other hire vehicle services"] in [LOCATION]?

SHOW OPTIONS AWARE OF / SHOW ALL ON ONE SCREEN

		Value of **taxis**			
		Good	OK	Poor	Can't say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

		Value of **rideshare** services (eg: Uber, Shebah, Ola, Didi)			
		Good	OK	Poor	Can't say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

		Value of **limousines or other hire vehicle services**			
		Good	OK	Poor	Can't say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

SHOW IF USE TAXIS (Q6=1) AND / OR HIRE VEHICLES (Q9A OR B=1) IN THE LAST 6 MONTHS

22. What methods have you used (or tried to use) to get ["taxis" OR "rideshare services" OR "limousines or other hire vehicle services" OR "taxis or rideshare services" OR "rideshare services, limousines or other hire vehicle services" OR "taxis, rideshare services, limousines or other hire vehicle services"] in the last 6 months in [LOCATION]?

MULTIPLE RESPONSE / SHOW ONLY OPTIONS USED IN LAST 6 MONTHS

		Pre-booking for a particular time or at least 15 minutes ahead (including regular bookings)	Booking – to come as soon as possible (including 'next available')	From a rank	By hailing in the street
A	**Taxis**	1	2	3	4
B	**Rideshare services** (eg: Uber, Shebah, Ola, Didi)	1	2		
C	**Limousines or other hire vehicle services**	1	2		

ASK IF USED / TRIED TO USE RANK OR HAIL TO GET TAXIS IN LAST 6 MONTHS (Q22A=3-4)

23. When you try to get a **taxi** at a rank or to hail one in the street – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET TAXIS IN LAST 6 MONTHS (Q22A=2)

24. When you try to get a **taxi** by booking one to come as soon as possible (including 'next available' bookings) – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET RIDESHARE IN LAST 6 MONTHS (Q22B=2)

25. When you try to use a **rideshare service** by booking one to come as soon as possible – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET LIMO / OTHER HV LAST 6 MTHS (Q22C=2)

26. When you try to use **limousines or other hire vehicle services** by booking one to come as soon as possible – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE RANK OR HAIL TO GET TAXIS IN LAST 6 MONTHS (Q22A=3-4)

27. What impact, if any, would it have on you if there was a **minimum fare** in [LOCATION] for any **taxi** caught from a rank or by hailing it in the street of…

		I would be **much less** likely to use ranks or hail a taxi	I would be **a little less** likely to use ranks or hail a taxi	It would make **no difference** to how often I would use a rank or hail a taxi	Can't say
A	$5	1	2	3	4
B	$7.50	1	2	3	4
C	$10	1	2	3	4
D	$12.50	1	2	3	4

ASK IF USED TAXIS (Q6=1-2) OR HIRE VEHICLES (Q9A OR B=1-2) IN LAST 12 MONTHS

28. In the past 12 months, which – if any – of the following **problems** have you personally experienced using [INSERT APPROPRIATE TEXT OPTION: **"taxis"** OR **"rideshare services"** OR **"limousines or other hire vehicle services**" OR **"taxis or rideshare services"** OR **"rideshare services, limousines or other hire vehicle services"** OR **"taxis, rideshare services, limousines or other hire vehicle services**"]?

MULTIPLE RESPONSE / IF CODE 10 SELECTED CANNOT SELECT ANY OTHER CODE IN **COLUMN**

SHOW OPTIONS USED IN LAST 12 MONTHS

	A	B	C
	Using **Taxis**	Using **Rideshare services**	Using **Limousines or other hire vehicle services**
Difficulty getting one at a major event (ie: had to wait an unreasonably long time, or unable to get one at all)	11	11	11
I couldn't get one when I wanted one some other time	1	1	1
I was overcharged	2	2	2
The driver did not take the most direct route	3	3	3
The driver did not know where they were going	4	4	4
The driver refused to take me somewhere after I told them where I was going	5	5	5
I felt unsafe because of the way the driver was driving, or the driver was breaking the road rules	6	6	6
The driver was rude, unhelpful, or offensive	7	7	7
The price during peak or surge pricing was too high	8	8	8
Concerns about cleanliness or hygiene during COVID	12	12	12
Something else	9	9	9
Had no problems	10	10	10

ASK IF SELECT SOMETHING ELSE CODE 9 IN Q28

29. What other problems did you experience…. SHOW IF CODE 9 SELECTED IN Q28

A	B	C
Using **Taxis**	Using **Rideshare services**	Using **Limousines or other hire vehicle services**
TEXT BOX	TEXT BOX	TEXT BOX

ASK IF USED TAXIS (Q6=1-2) OR HIRE VEHICLES (Q9A OR B=1-2) IN LAST 12 MONTHS

30. The last time you tried to use [INSERT APPROPRIATE TEXT OPTION BASED ON ANY ATTEMPT TO USE METHODS: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"], what happened?

	A	B	C
	Last time trying to use a **taxi**	Last time trying to use a **rideshare**	Last time trying to use a **limousine** or **other hire vehicle service**
I was able to get one	1	1	1
It didn't turn up after I had booked it	2	2	2
No taxi came to the rank	3		
No taxi was available to hail on the street	4		
Can't recall	5	5	5

ASK ONLY IF ANY CODE 2-4 IN Q30 AND MATCHING CODE 2 IN Q14 [IE: Q14A=2 AND Q30A=2-4; OR Q14B=2 AND Q30B=2; OR Q14C=2 AND Q30C=2]

31. When you were unable to use a [INSERT APPROPRIATE TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**" OR "**taxi or rideshare service**" OR "**rideshare service, limousine or other hire vehicle service**" OR "**taxi, rideshare service, limousine or other hire vehicle service**"], what did you do instead?

MULTIPLE RESPONSE / SHOW OPTIONS WHERE CODE 2-4 SELECTED IN Q30

PROG NOTE: NOTE THAT TEXT INSERT OPTIONS IN THE QUESTION WORDING ARE SINGULAR, NOT PLURAL AS IN MOST OTHER QUESTIONS

	A	B	C
	Last time trying to use a **taxi**	Last time trying to use a **rideshare service**	Last time trying to use a **limousine** or **other hire vehicle service**
Decided not to make the journey at all	1	1	1
Took a train	2	2	2
Took a regular bus (ie, not a courtesy bus)	3	3	3
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	4	4	4
Used courtesy transport provided by a venue such as a pub or club	5	5	5
Drove myself or got a lift	6	6	6
Used a rideshare service instead	7	7	7
Used a limousine or other hire vehicle service	8	8	8
Used a taxi instead	9	9	9
Walked or cycled	10	10	10
Used a bikeshare service	13	13	13
Used a car sharing service such as GoGet or Car Next Door, Flexicar, Popcar	11	11	11
Something else	12	12	12
Can't recall	13	13	13

PART 4: WORKPLACE POLICY

ASK IF EMPLOYED (Q4=1-2)

ASK EVEN IF NOT AWARE OF OR USE ANY TRANSPORT SERVICES

32. Does your workplace at least sometimes pay for staff to travel for work-related purposes using:

		Yes	No	Don't know
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle services** (eg: Uber, Shebah, Ola, Didi)	1	2	3

ASK ONLY IF CODE 1 TO AT LEAST ONE IN Q32

33. In the last 12 months, has your employer: SHOW ONLY OPTIONS SELECTED IN Q32

		Allowed staff to use this service more than in previous years	Required staff to use this service less than in previous years	Made no changes to policy or preference that you know of
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle** services (eg: Uber, Shebah, Ola, Didi)	1	2	3

ASK ONLY IF CODE 1-2 TO AT LEAST ONE IN Q33

33a. Is the change in your employer's views on employee transport related to COVID : SHOW ONLY OPTIONS SELECTED IN Q33

		Completely related to COVID	Partly related to COVID	Not related to COVID
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle** services (eg: Uber, Shebah, Ola, Didi)	1	2	3

ASK ONLY IF CODE 1 TO AT LEAST ONE IN Q32

34. Thinking about staff using **taxis** or **any rideshare, limousine or other hire vehicle** services (eg: Uber, Shebah, Ola, Didi)… does your workplace:
    (1) Have a **policy** to only use **taxis**
    (2) Have a **preference** for **taxis**
    (3) Have **no** preference or policy either way
    (4) Have a **preference** for **any rideshare, limousine or other hire vehicle** services
    (5) Have a **policy** to only use **any rideshare, limousine or other hire vehicle** services
    (6) Don't know

PART 5: LAST TRIP SECTION – BASED ON LAST TRIP

IF NOT USED A TAXI IN THE LAST 6 MONTHS (Q6=2-5) OR ANY HIRE VEHICLE IN THE LAST 6 MONTHS (Q9A OR B=2-5) THEN SKIP TO Q64

SHOW IF USED TAXI IN LAST 6 MONTHS (Q6=1) BUT NOT ANY HIRE VEHICLE (Q9A OR B=2-5)

Please now think about just your **very last trip** in a **taxi**.

SHOW IF USED A RIDESHARE IN LAST 6 MONTHS (Q9A=1) BUT NOT LIMOUSINE OR OTHER HIRE VEHICLE SERVICE (Q9B=2-5) OR A TAXI (Q6=2-5)

Please now think about just your **very last trip** using **a rideshare** service.

SHOW IF USED A LIMOUSINE OR OTHER HIRE VEHICLE SERVICE IN LAST 6 MONTHS (Q9B=1) BUT NOT RIDESHARE (Q9A=2-5) OR A TAXI (Q6=2-5)

Please now think about just your **very last trip** using a **limousine or other hire vehicle service**.

ASK IF USED BOTH RIDESHARE (Q9A=1) AND A LIMOUSINE OR OTHER HIRE VEHICLE SERVICE (Q9B=1) IN LAST 6 MONTHS BUT NOT A TAXI (Q6=2-5)

35. Please think now about just your **very last** trip. Was that last trip using:
    (1) A **rideshare** service
    (2) A **limousine** or **other hire vehicle**

ASK IF USED BOTH TAXIS (Q6=1) AND ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

ONLY SHOW CODE 2 IF Q9A=1 / ONLY SHOW CODE 3 IF Q9B=1

36. Was your very last trip :
    (1) Using a **taxi**
    (2) Using a **rideshare** service
    (3) Using a **limousine** or **other hire vehicle service**

ASK IF LAST TRIP WAS A RIDESHARE [Q36 = 2]

36A. Did you use a 'pooled' rideshare facility for that last trip (ie: where you share the costs with someone else who is doing a similar trip at the same time)?
    (1) Yes
    (2) No
    (3) Unsure / can't recall

37. Which of these best describes the type of place **where** you were picked up and dropped off for that very last trip?

	Pick up location SINGLE RESPONSE	**Drop off location** SINGLE RESPONSE
A private home or apartment	☐1	☐1
A workplace or office	☐2	☐2
A shop or shopping centre	☐3	☐3
A pub, club or other similar type of location	☐4	☐4
In a CBD, town centre or other busy area	☐5	☐5
At an event	☐6	☐6
At an airport	☐7	☐7
At a train station or other transport connection	☐8	☐8
Hospital or medical facility	☐9	☐9
Somewhere else: Please describe __________	☐10	☐10

38. What **day and time** were you picked up? *Please select ONE time period only. Note that after midnight is the morning of the following day*

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Early morning - midday	☐12	☐22	☐32	☐42	☐52	☐62	☐72
Midday-6pm	☐13	☐23	☐33	☐43	☐53	☐63	☐73
6pm-10pm	☐14	☐24	☐34	☐44	☐54	☐64	☐74
10pm-midnight	☐15	☐25	☐35	☐45	☐55	☐65	☐75
After midnight	☐21	☐31	☐41	☐51	☐61	☐71	☐11

Peak weekend period

39. What was your **main purpose** in taking your most recent trip?

SINGLE RESPONSE

(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) For education purposes
(7) Something else

40. What were the reasons you used a [INSERT TEXT: **"taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service"**] for this journey instead of other transport options or driving yourself?

	Main reason SINGLE RESPONSE	**Other reasons** MULTIPLE RESPONSE
Quicker to get / shorter waiting time	☐1	☐1
Quicker or more direct travel time	☐2	☐2
More convenient than driving (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	☐3
More convenient than other paid transport options I could have used	☐4	☐4
Cheaper than alternatives	☐5	☐5
More reliable than alternatives	☐6	☐6
Makes different types of vehicle (like a van, ute or luxury car) available	☐7	☐7
I didn't have access to any other transport options	☐8	☐8
It's what I am most comfortable or familiar using	☐9	☐9
It was a good option to use during COVID conditions	☐11	☐11
Another reason: Please describe _____________	☐10	☐10

41. How was the [INSERT TEXT: "**taxi**" OR **"rideshare service"** OR **"limousine** or **other hire vehicle service**"] organised for that trip?

IF TAXI SHOW ALL CODES EXCEPT 4 / IF ANY TYPE OF HIRE VEHICLE DO NOT SHOW CODES 1-3

(1) At a taxi rank
(2) Hailed/waved down on the street
(3) Phoned a taxi company
(4) By calling a phone number
(5) By internet booking
(6) Contacted a driver directly
(7) Had a regular booking
(8) Used a smartphone application (app)
(9) Some other way
(10) I'm not sure because someone else organised it

ASK IF CAUGHT FROM RANK (Q41=1) or HAILED (Q41=2)

42. Do you recall the name of the taxi company whose car you caught?

(1) Yes: *Please specify* _________________
(2) I think so: *Please specify* _________________
(3) No

ASK IF CAUGHT FROM RANK (Q41=1) or HAILED (Q41=2)

43. When you thought about catching the taxi, did you…
    (1) Consider calling or booking a taxi or other type of vehicle instead
    (2) **Not** consider calling or booking a taxi or other type of vehicle.

ASK IF CONSIDERED BOOKING BUT DID NOT (q43=1)

44. Given you considered booking a taxi (or other type of vehicle) but instead [INSERT IF Q41=1 “got a taxi at a rank” OR IF Q41=2 “hailed a taxi on the street”], was that because…
    please select all that apply

MULTIPLE RESPONSE

(1) You did not want to pay a booking fee
(2) You didn’t think a booked taxi would arrive any faster
(3) You didn’t have access to a phone or the internet to make a booking
(4) You didn’t know how to book a taxi or other vehicle
(5) You wanted to be anonymous
(6) There was a taxi immediately available [INSERT IF Q41=1 “at the rank” OR IF Q41=2 “to be hailed on the street”]
(7) Something else: *Please specify* _______

ASK IF USED SOME FORM OF BOOKING SERVICE OR APP (Q41=3,4,5,8)

45. Do you recall the

INSERT IF Q41=3 “name of the taxi company you called?”

INSERT IF Q41=4 “phone number or the name of the phone service you called?”

INSERT IF Q41=5 “website you used?”

INSERT IF Q41=8 “smartphone application (app) you used?”

(1) Yes: *Please specify* _________________
(2) I think so: *Please specify* _________________
(3) No

ASK IF CAUGHT FROM RANK (Q41=1)

46. How long did you have to wait at the rank?
    (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
    (6) Can’t recall

ASK IF CAUGHT BY HAILING (Q41=2)

47. How long did you have to wait to hail a taxi?
    (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
    (7) More than 40 minutes
    (8) Can't recall

ASK IF BOOKED (Q41=3, 4, 5, 6, 8)

48. Did you ask for a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"]:
    (1) As soon as possible / the next available
    (2) For a particular time

ASK IF BOOKED NEXT AVAILABLE VEHICLE (Q48=1)

49. Were you given an estimate of the waiting time till the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"] would arrive?
    (1) Yes
    (2) No
    (3) Can't recall

ASK IF BOOKED NEXT AVAILABLE VEHICLE (Q48=1)

50. How long did you have to wait for the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"] after you booked it?
    (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
    (6) Can't recall

ASK IF UNSURE OR OTHER METHOD OF GETTING VEHICLE (Q41=9-10)

51. How long did you have to wait for the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"]?
    (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
    (6) Can't recall

ASK IF REGULAR BOOKING (Q41=7) OR PREBOOKED (Q48=2)

52. How long, if at all, did you have to wait for the [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service**"] after your booked time?
    - **(0) It was early or on-time**
    - (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
    - (6) Can't recall

ASK IF GIVEN A WAITING TIME ESTIMATE (q49=1)

53. How accurate was the estimate of your waiting time?
    - (1) It came **much sooner** than estimated
    - (2) It came **a little sooner** than estimated
    - (3) It was **very close**
    - (4) It took **a little longer** than estimated
    - (5) It took **much longer** than estimated

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

54. How satisfied or dissatisfied were you with <u>how long you had to wait</u> to use the [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service**"]?
    - (1) Very dissatisfied
    - (2) Dissatisfied
    - (3) Slightly dissatisfied
    - (4) Slightly satisfied
    - (5) Satisfied
    - (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

55. Approximately how long do you think your last trip was?
    - (1) Less than 5 km
    - (2) 5 km to under 10 km
    - (3) 10 km to under 15 km
    - (4) 15 km to under 25 km
    - (5) 25 km to under 50 km
    - (6) 50 km or more

ASK IF LAST TRIP IN RIDESHARE OR LIMOUSINE OR OTHER OF HIRE VEHICLE

56. Before you booked the trip, did you compare prices for different hire vehicles?
    (1) Yes – on the internet or using apps
    (2) Yes – by phoning around
    (3) Yes – in some other way
    (4) No

ASK IF DID NOT COMAPRE PRICES (Q56=4)

57. Why did you not compare prices before you booked the trip?

MULTIPLE RESPONSE
    (1) I always use that provider or service
    (2) I was happy with the price estimate I was given
    (3) Some other reason

ASK IF LAST TRIP IN RIDESHARE OR LIMOUSINE OR OTHER OF HIRE VEHICLE

58. While you were making the booking, were you given a fare estimate?
    (1) Yes
    (2) No
    (3) Can't recall

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

59. Including any service fee for electronic payment and any other charges, what was the cost of your last trip? *Please enter your **best estimate** of the total cost to the nearest dollar*

    $_____
    (1) I'm not sure because someone else paid
    (2) Can't recall

ASK IF LAST TRIP IN ANY TYPE OF HIRE VEHICLE AND GIVEN A FARE ESTIMATE (q58=1)

60. How accurate did you find the fare estimate to be? Was the actual fare you paid…
    (1) **Much less** than the estimate
    (2) **A little less** than the estimate
    (3) **Very close** to the estimate
    (4) **A little more** than the estimate
    (5) **Much more** than the estimate

ASK ALL IF AWARE OF COST OF LAST TRIP [Q59=1-8]

61. How satisfied or dissatisfied were you with the amount you paid for the trip?
    (1) Very dissatisfied
    (2) Dissatisfied
    (3) Slightly dissatisfied
    (4) Slightly satisfied
    (5) Satisfied
    (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

62. Thinking about all aspects of your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"], how satisfied or dissatisfied were you with the overall experience?
    (1) Very dissatisfied
    (2) Dissatisfied
    (3) Slightly dissatisfied
    (4) Slightly satisfied
    (5) Satisfied
    (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

These next few questions about your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"] are specifically in relation to COVID.

62A. On your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"], how confident were you using this type of transport in a COVID environment?
    (1) Totally confident
    (2) Very confident
    (3) Somewhat confident
    (4) Not very confident
    (5) Not at all confident

62B. From a COVID perspective, for that last trip how well did you consider:

		Good	Acceptable	Unacceptable
A	The vehicle to have been cleaned and sanitised	1	2	3
B	Social distancing to be maintained	1	2	3

62C. On that last trip in a [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service**"], did:

		Yes	No	Not applicable
A	The driver wear a mask	1	2	
B	You wear a mask	1	2	
C	All other passengers wear a mask	1	2	3

ASK IF PASSENGER WORE A MASK [q62C-B = CODE 1]

62D. You said that you wore a mask on that last trip. Did:

(1) You wear a mask of your own
(2) The driver provide the mask.
(3) Can't recall

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

63. And what impact, if any, did your last trip in a [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service** "] have on how likely you are to use that service again?

(1) Made you **much less** likely to use it again
(2) Made you a **little less** likely to use it again
(3) Had **no impact**
(4) Made you a **little more** likely to use it again
(5) Made you **much more** likely to use it again

PART 6: PERCEIVED STRENGTHS AND WEAKNESSES OF SERVICES

ASK Q64 FOR ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

64. Do you personally think that each of the following is a strength (✓), weakness (✗) or neutral (○) characteristic of the different types of transport options? *If you don't have any experience or opinion, please tell us what you think is most likely the case.*

REQUIRES ONE ANSWER FOR EACH TYPE OF TRANSPORT PER ROW

RANDOMISE ORDER		Taxis			Rideshare			Limousines or other hire vehicle services		
		✓	○	✗	✓	○	✗	✓	○	✗
A	Safety	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
B	Value for money	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
C	Availability	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
D	Waiting times	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
E	Vehicle quality	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
F	Navigation and route knowledge	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
G	Driver presentation and attitude	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
H	Driving skills	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
I	Customer service	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
J	Convenience	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
K	Hygiene during COVID	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

65. Overall, do you have a preference for using:
    (1) **Taxis**
    (2) Hire vehicles - **Rideshare, Limousines** or **other hire vehicle services**
    (3) No preference
    (4) Prefer not to use any of these

ASK IF PREFERENCE FOR HIRE VEHICLES [Q65=2]

66. Do you have a preference for:
    (1) **Rideshare** services (eg: Uber, Shebah, Ola, Didi)
    (2) **Limousines** or **other hire vehicle services**
    (3) Both equally

ASK IF HAVE A PREFERENCE FOR TAXIS [Q65=1] OR HIRE VEHICLES [Q65=2]

67. How strong is your preference for using [INSERT TEXT: "**taxis"** OR **"rideshare services"** OR **"limousine** or **other hire vehicle services**" OR "**any type of hire vehicles**"]? Would you say…
    (1) You would **only** use them
    (2) You **strongly** prefer to use them
    (3) You have only a **slight** preference for using them

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

68. In the next 12 months, what is the thing that is <u>most likely</u> to get you to use different types of transport more regularly?

SINGLE RESPONSE PER **COLUMN**

	A	B	C
	Taxis	**Rideshare services**	**Limousines or other hire vehicle services**
If fares get cheaper	1	1	1
If there is no peak or surge pricing	2	2	2
If more services become available in my area	3	3	3
If there is a shorter time to wait to get one	4	4	4
If booking services improve	5	5	5
If driver quality improves	6	6	6
If vehicle hygiene or cleanliness was improved	8	8	8
None of these improvements would make me use them more regularly	7	7	7

PART 7: CONTEXT

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

70. Are you aware of any of these **rules or regulations** that currently apply to using types of point-to-point transport? MULTIPLE RESPONSE EXCEPT CODE 5
    (1) Booked trips in **taxis** are not subject to maximum fare regulation
    (2) All providers of booked trips in **taxis** or **hire vehicles** have to give a fare estimate before starting a trip
    (3) Rank and hail **taxi** trips remain subject to maximum fares set by the Government
    (4) Rank and hail trips can only be undertaken by **taxis**
    (5) None of these

69. The NSW Government has recently announced that it will shortly stop regulating the number of taxi licences and taxi fares. Prior to doing this survey, were you aware that the NSW Government was intending to make these changes?
    (1) Yes
    (2) I had heard there will be changes, but not aware exactly what they were
    (3) Was not aware that there will be changes.

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

77. Overall, what has been the impact of the COVID 19 pandemic on your level of use of these services, and how confident you would feel to use them:

	Taxis			Rideshare			Limousines or other hire vehicle services		
	Higher	Same	Lower	Higher	Same	Lower	Higher	Same	Lower
Your **use** of:	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
How **confident** you would feel to use:	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

78. Right at the moment, what do you feel the impact of the COVID-19 situation is…

	Extremely negative impact				Small negative impact	No real impact	Small positive impact				Extremely positive impact
A. For you personally	-5	-4	-3	-2	-1	0	1	2	3	4	5
B. For Australia	-5	-4	-3	-2	-1	0	1	2	3	4	5

PART 8: OTHER DEMOGRAPHICS

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

73. 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 ORIMA 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) Prefer not to say

74. Do you have a physical disability

SINGLE RESPONSE

(1) Yes
(2) No
(3) Prefer not to say

ASK IF HAVE DISABILITY (Q74=1)

75. Can you:

SINGLE RESPONSE

(1) Catch any type of taxi or rideshare
(2) Only use a wheelchair accessible taxi or rideshare
(3) Can't say
(4) Prefer not to say

ASK IF HAVE DISABILITY (Q74=1)

76. Do you get payment assistance for taxis from:

CODES 1 AND 2 ARE MULTIPLE RESPONSE

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

CLOSE

Thank you for taking the time to answer this survey. The survey is being conducted by ORIMA Research and the ORU 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.

Appendix B: Sample Demographics

Targets

The table below shows the 2022 sample demographics versus quotas based on ABS population data. The 2022 survey sample was weighted to match the original 2017 weighted sample, to maximise consistency of the year-by-year comparisons.

Quotas (based on population)

Sydney	Male	Female	Total
16-29	12%	14%	27%
30-39	10%	9%	19%
40-49	9%	9%	18%
50-59	7%	8%	15%
60-69	6%	6%	11%
70+	5%	5%	10%
Total	49%	51%	100%

Reg City	Male	Female	Total
16-29	6%	12%	18%
30-39	6%	9%	15%
40-49	9%	10%	19%
50-59	8%	10%	18%
60-69	7%	7%	15%
70+	7%	9%	16%
Total	44%	56%	100%

Rest NSW	Male	Female	Total
16-29	10%	10%	20%
30-39	7%	8%	15%
40-49	8%	10%	18%
50-59	8%	9%	17%
60-69	8%	8%	16%
70+	7%	8%	15%
Total	48%	52%	100%

Actual 2022 sample

Sydney	Male	Female	Total
16-29	10%	10%	21%
30-39	9%	9%	18%
40-49	8%	8%	17%
50-59	8%	8%	16%
60-69	7%	8%	15%
70+	8%	7%	14%
Total	50%	50%	100%

Reg City	Male	Female	Total
16-29	6%	10%	16%
30-39	5%	5%	11%
40-49	5%	5%	10%
50-59	7%	9%	16%
60-69	13%	12%	25%
70+	12%	10%	22%
Total	49%	51%	100%

Rest NSW	Male	Female	Total
16-29	2%	9%	11%
30-39	7%	8%	14%
40-49	6%	8%	14%
50-59	10%	9%	19%
60-69	14%	10%	24%
70+	11%	8%	18%
Total	49%	51%	100%

Difference

Sydney	Male	Female	Total
16-29	-2%	-4%	-6%
30-39	-1%	-1%	-2%
40-49	0%	-1%	-1%
50-59	1%	0%	1%
60-69	1%	2%	3%
70+	3%	2%	5%
Total	1%	-1%	0%

Reg City	Male	Female	Total
16-29	0%	-1%	-2%
30-39	-1%	-4%	-4%
40-49	-4%	-5%	-9%
50-59	-1%	-1%	-2%
60-69	6%	5%	11%
70+	5%	1%	6%
Total	5%	-5%	0%

Rest NSW	Male	Female	Total
16-29	-8%	-1%	-9%
30-39	0%	0%	0%
40-49	-2%	-2%	-4%
50-59	2%	1%	2%
60-69	6%	2%	8%
70+	4%	-1%	3%
Total	1%	-1%	0%

Appendix C: Detailed Strengths and Weaknesses

Figure 98: Detailed strengths and weaknesses of transport options - Sydney Q64

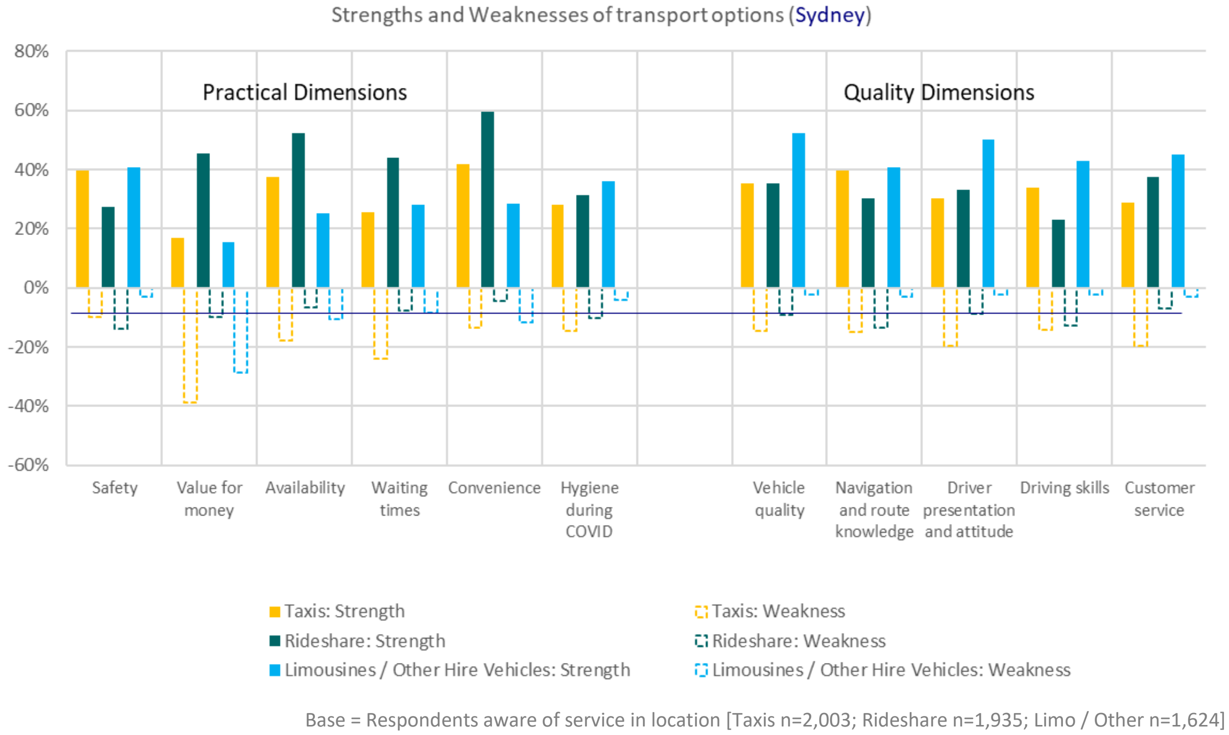


Figure 99: Detailed strengths and weaknesses of transport options - Other Urban Q64

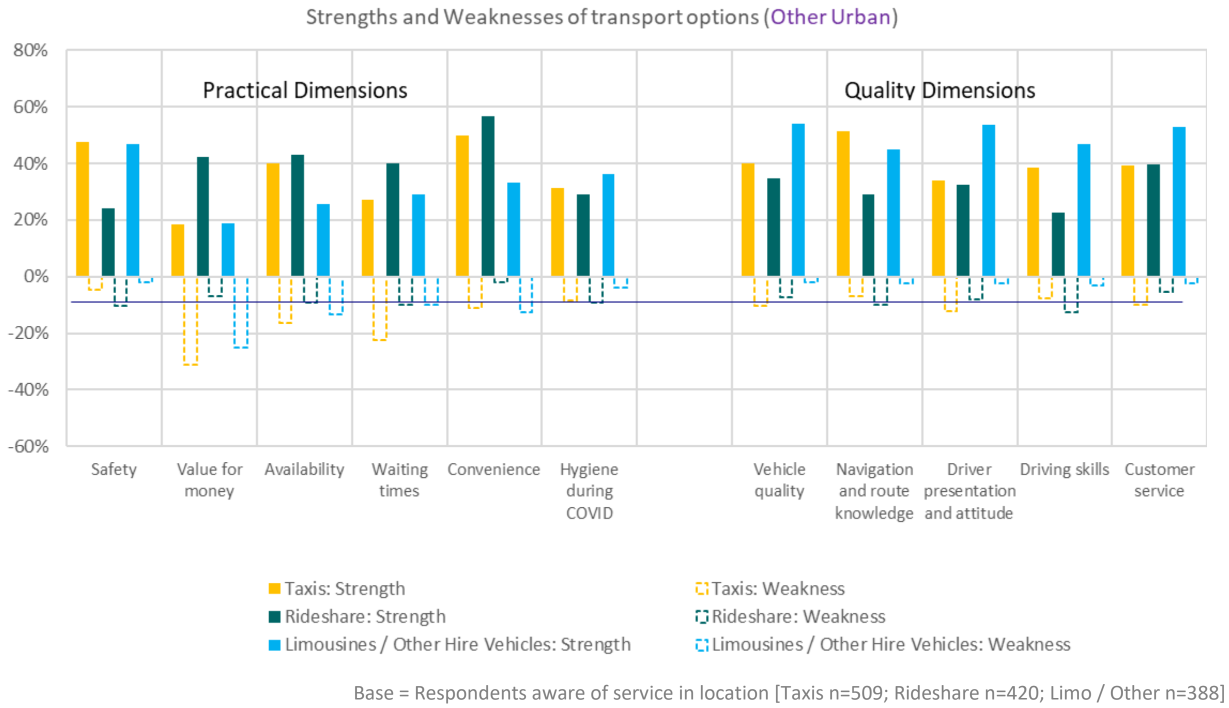
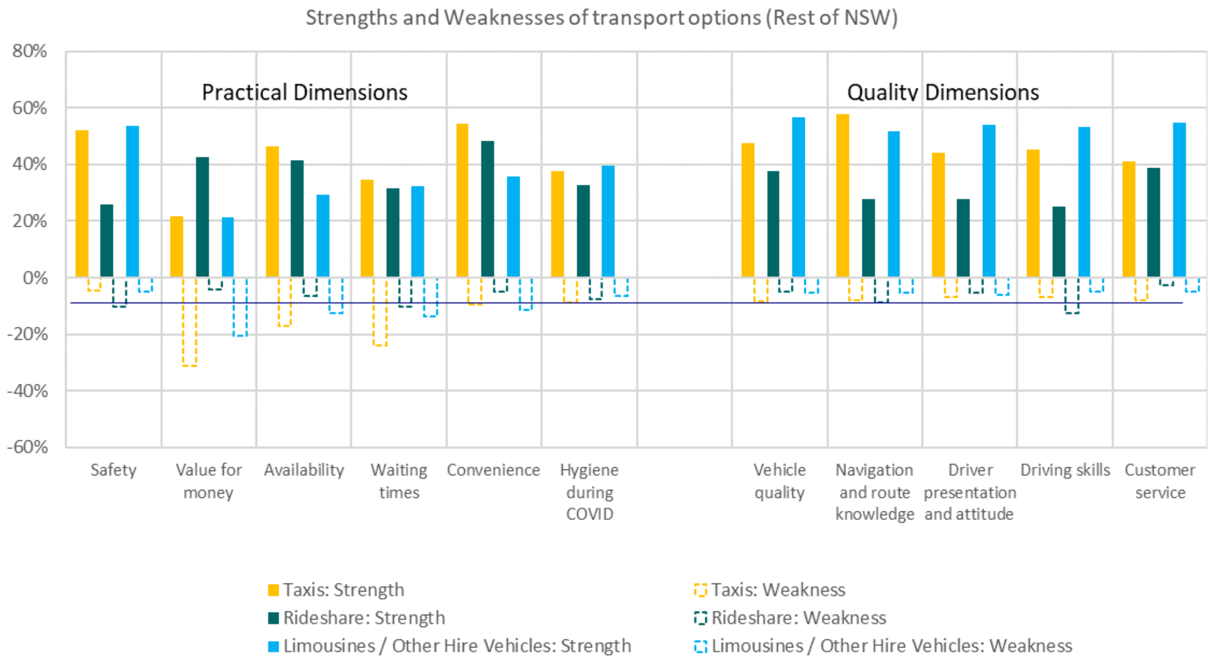


Figure 100: Strengths and weaknesses of transport options - Rest of NSW Q64



Base = Respondents aware of service in location [Taxis n=371; Rideshare n=194; Limo / Other n=191]

Appendix D: Demographic Comparisons

Demographic breakdowns for the 2022 survey are provided in a separate interactive electronic format.

Appendix E: Tracking Chart Data

This section shows the data underlying each of the tracking charts throughout the report.

Figure numbers shown in the captions relate to the position of the tracking chart in the main body of the report.

Figure 2: Change in awareness of point-to-point transport services in their location Q5/8/11

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	98%	89%	82%	97%	59%	75%	92%	29%	45%
2018	98%	94%	83%	98%	77%	81%	92%	43%	52%
2019	97%	94%	78%	95%	80%	76%	93%	44%	51%
2020	97%	94%	78%	94%	82%	71%	91%	50%	48%
2022	97%	94%	77%	93%	80%	70%	91%	50%	47%

Figure 4: Change in usage of point-to-point transport services in the last 6 months among all respondents Q6/9

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	51%	36%	11%	35%	10%	8%	32%	8%	4%
2018	52%	48%	13%	37%	28%	13%	29%	15%	5%
2019	49%	51%	10%	35%	29%	10%	34%	14%	6%
2020	31%	44%	5%	23%	24%	4%	21%	12%	3%
2022	35%	46%	7%	21%	25%	5%	20%	15%	5%

Figure 7: Change in frequency of using point-to-point transport services among service users Q13

Base = used in the last 6 months

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
		weekly			*monthly*	
2017	13%	18%	16%	52%	69%	38%
2018	15%	20%	12%	51%	68%	35%
2019	15%	21%	14%	51%	66%	41%
2020	14%	19%	27%	50%	66%	48%
2022	18%	19%	18%	50%	67%	46%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
		weekly			*monthly*	
2017	11%	16%	5%	53%	65%	32%
2018	8%	13%	2%	42%	59%	25%
2019	9%	17%	9%	41%	62%	26%
2020	9%	20%	22%	39%	59%	61%
2022	6%	10%	0%	38%	57%	8%

	Rest of NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
		weekly			*monthly*	
2017	16%	19%	17%	48%	72%	33%
2018	5%	14%	0%	40%	62%	8%
2019	13%	13%	8%	53%	60%	58%
2020	10%	18%	18%	46%	49%	41%
2022	6%	11%	34%	48%	49%	61%

Figure 9: Rate of change in use of transport services in the last 12 months amongst those who have ever used transport services. Q16
Table shows nett differential (i.e.: % reported an increase in use minus the proportion who reported a decrease in use)

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2016*	-9%	8%		-8%	2%		-8%	3%	
2017	-26%	26%	-10%	-19%	28%	-6%	-12%	21%	-12%
2018	-27%	29%	-28%	-26%	34%	-17%	-15%	20%	-25%
2019	-26%	23%	-28%	-27%	20%	-24%	-20%	1%	-45%
2020	-45%	-18%	-42%	-34%	-21%	-42%	-28%	-21%	-39%
2022	-33%	-16%	-42%	-33%	-17%	-47%	-23%	-16%	-43%

Figure 13: Changes in reported Impact of using hire vehicles on the use of taxis amongst users of both services Q17

	Sydney		Other urban		Other NSW	
	Use taxis a lot less often	Use taxis less often	Use taxis a lot less often	Use taxis less often	Use taxis a lot less often	Use taxis less often
2017	54%	78%	49%	66%	42%	63%
2018	53%	78%	54%	66%	54%	74%
2019	54%	78%	53%	80%	53%	76%
2020	65%	84%	58%	79%	67%	77%
2022	59%	80%	53%	75%	58%	70%

Figure 15: Change in prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	15%	11%	5%	9%	5%	2%	11%	16%	3%
2018	16%	13%	4%	12%	11%	3%	11%	15%	4%
2019	17%	15%	6%	13%	14%	4%	10%	19%	4%
2020	12%	12%	4%	10%	13%	4%	9%	16%	3%
2022	14%	18%	5%	11%	17%	3%	11%	19%	8%

Figure 18: Change in success rate for last attempt among users who could recall the outcome
(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses) Q30

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	77%	92%	91%	83%	95%	94%	77%	88%	94%
2018	78%	93%	92%	81%	93%	96%	87%	95%	100%
2019	78%	91%	86%	80%	93%	96%	81%	91%	87%
2020	74%	93%	89%	74%	92%	86%	86%	93%	100%
2022	75%	88%	82%	82%	90%	97%	84%	86%	87%

Figure 21: Change in experiencing ANY problem using point-to-point transport amongst users [Q28]

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2013	40%	-	-	-	-	-	-	-	-
2014	35%	-	-	27%	-	-	26%	-	-
2015	36%	-	-	24%	-	-	24%	-	-
2016	37%	27%	-	26%	22%	-	27%	22%	-
2017	62%	46%	25%	40%	34%	15%	45%	40%	18%
2018	65%	49%	26%	55%	37%	10%	48%	49%	17%
2019	59%	51%	30%	51%	45%	23%	54%	54%	36%
2020	64%	50%	34%	52%	49%	24%	49%	45%	34%
2022	63%	57%	35%	53%	56%	34%	50%	63%	46%

Figure 23: Change in satisfaction with point-to-point transport services [Q7/10]

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	53%	50%	41%	14%	4%	2%
2018	56%	59%	43%	15%	4%	1%
2019	60%	62%	40%	12%	5%	2%
2020	52%	65%	39%	13%	4%	2%
2022	55%	62%	39%	12%	5%	2%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	55%	23%	39%	8%	4%	2%
2018	55%	38%	45%	11%	4%	2%
2019	58%	45%	43%	8%	4%	2%
2020	52%	47%	40%	10%	4%	2%
2022	52%	44%	38%	8%	5%	3%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	54%	19%	25%	11%	6%	3%
2018	56%	25%	27%	8%	8%	4%
2019	61%	29%	30%	9%	11%	4%
2020	53%	24%	27%	9%	8%	2%
2022	49%	28%	23%	12%	10%	7%

Figure 27: Changes in perceived strengths and weaknesses of transport options amongst those aware of the service in their region (average Practical Dimensions and Quality Dimensions scores) Q64

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	7%	33%	20%	5%	23%	48%
2018	6%	41%	18%	7%	26%	48%
2019	12%	41%	16%	16%	24%	45%
2020	7%	42%	12%	11%	23%	45%
2022	11%	37%	15%	17%	22%	44%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	22%	28%	29%	28%	21%	53%
2018	16%	33%	24%	24%	24%	53%
2019	19%	37%	26%	25%	29%	53%
2020	19%	36%	22%	31%	27%	47%
2022	20%	33%	18%	31%	23%	48%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	23%	31%	22%	36%	23%	48%
2018	25%	34%	31%	36%	29%	54%
2019	25%	33%	25%	38%	24%	49%
2020	24%	36%	25%	38%	29%	53%
2022	25%	31%	22%	40%	25%	49%

Figure 29: Changes in preferences for transport options Q65/66

	Sydney			Other urban			Other NSW		
	Taxis	Rideshare	Prefer not to use any	Taxis	Rideshare	Prefer not to use any	Taxis	Rideshare	Prefer not to use any
2017	26%	25%	17%	27%	9%	24%	31%	8%	26%
2018	25%	33%	14%	25%	19%	18%	29%	16%	24%
2019	25%	35%	12%	26%	24%	17%	33%	14%	24%
2020	18%	36%	16%	25%	26%	20%	25%	13%	31%
2022	22%	32%	16%	22%	22%	21%	27%	14%	28%

Figure 41: Change in perceptions of OVERALL value for money amongst those aware of the service in their region Q20

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good + OK			*Poor*		
2017	46%	61%	36%	43%	5%	17%
2018	49%	67%	34%	42%	6%	17%
2019	52%	70%	35%	38%	7%	16%
2020	44%	72%	33%	43%	7%	17%
2022	50%	67%	33%	35%	11%	16%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good + OK			*Poor*		
2017	50%	38%	40%	25%	3%	10%
2018	46%	50%	39%	31%	6%	13%
2019	54%	62%	42%	30%	5%	16%
2020	50%	60%	41%	27%	5%	10%
2022	49%	56%	37%	23%	10%	16%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good + OK			*Poor*		
2017	46%	50%	33%	28%	6%	13%
2018	51%	56%	32%	27%	4%	13%
2019	53%	59%	38%	28%	7%	15%
2020	46%	53%	30%	30%	8%	19%
2022	52%	61%	44%	21%	6%	14%

Figure 52: Change over time in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33

	Sydney				Other urban				Other NSW			
	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use
2017	10%	28%	17%	14%	8%	37%	21%	8%	17%	33%	14%	22%
2018	15%	39%	15%	9%	13%	34%	11%	6%	9%	27%	14%	6%
2019	16%	35%	19%	12%	12%	44%	14%	7%	24%	39%	19%	21%
2020	10%	20%	18%	16%	6%	18%	21%	26%	16%	29%	24%	17%
2022	14%	22%	16%	14%	18%	20%	14%	17%	23%	30%	14%	11%

Figure 55: Changes in usage of vehicle types for last trip (base = used transport in last 6 months) QX

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	56%	39%	6%	73%	18%	10%	79%	16%	5%
2018	45%	50%	6%	52%	36%	12%	61%	30%	9%
2019	42%	54%	5%	46%	46%	8%	70%	25%	5%
2020	30%	67%	2%	46%	52%	3%	64%	30%	5%
2022	36%	62%	2%	38%	56%	7%	58%	37%	5%

Figure 56: Usage of 'pooled' rideshare facility for last trip (base = used rideshare for last trip) Q36a

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	-	-	-	-	-	-	-	-	-
2018	-	16%	-	-	18%	-	-	28%	-
2019	-	19%	-	-	11%	-	-	17%	-
2020	-	11%	-	-	16%	-	-	42%	-
2022	-	9%	-	-	15%	-	-	10%	-

Figure 58: Last trip – Change in proportion of Last Trips after 10pm Q38

	Sydney				Other urban				Other NSW			
	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs
2017	9%	17%	9%	7%	14%	16%	4%	5%	13%	27%	-	-
2018	8%	18%	6%	6%	14%	22%	4%	16%	16%	19%	-	-
2019	8%	14%	7%	7%	11%	24%	9%	9%	16%	38%	-	-
2020	10%	16%	11%	7%	17%	18%	6%	6%	22%	20%	-	-
2022	8%	13%	11%	9%	19%	28%	7%	2%	15%	28%	-	-

Figure 63: Last trip – Changes in method of obtaining vehicle Q41

	Sydney				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2012	33%	34%	23%	4%	1%
2013	30%	33%	25%	4%	2%
2014	29%	32%	23%	6%	3%
2015	30%	29%	25%	8%	3%
2016	31%	26%	25%	8%	3%
2017	34%	22%	25%	8%	4%
2018	34%	21%	24%	8%	4%
2019	33%	21%	21%	11%	5%
2020	22%	27%	22%	14%	3%
2022	27%	20%	21%	13%	9%

	Other urban				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2014	32%	11%	47%	3%	0%
2015	33%	10%	44%	3%	2%
2016	32%	6%	47%	5%	2%
2017	33%	5%	52%	4%	2%
2018	37%	3%	51%	4%	3%
2019	36%	5%	41%	11%	1%
2020	31%	3%	41%	13%	2%
2022	15%	2%	54%	12%	13%

	Other NSW				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2014	27%	3%	62%	1%	1%
2015	29%	0%	64%	0%	0%
2016	20%	2%	71%	1%	0%
2017	22%	2%	66%	2%	2%
2018	26%	4%	61%	3%	0%
2019	20%	5%	66%	4%	2%
2020	22%	2%	58%	0%	12%
2022	22%	5%	54%	7%	7%

Figure 65: Last trip – Changes in type of booking Q48

	Sydney				Other urban				Other NSW			
	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked
2017	53%	88%	47%	12%	82%	88%	18%	12%	73%	92%	27%	8%
2018	58%	89%	42%	11%	67%	84%	33%	16%	74%	82%	26%	18%
2019	55%	88%	45%	12%	69%	89%	31%	11%	70%	87%	30%	13%
2020	62%	92%	38%	8%	73%	87%	27%	13%	85%	93%	15%	7%
2022	61%	92%	39%	8%	72%	84%	28%	16%	78%	87%	22%	13%

Figure 70: Changes in overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	56%	49%	73%	82%	89%	82%
2018	55%	46%	78%	82%	88%	89%
2019	55%	49%	75%	82%	89%	85%
2020	52%	48%	51%	77%	84%	61%
2022	50%	36%	64%	78%	81%	83%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	48%	32%	90%	81%	81%	95%
2018	53%	48%	84%	76%	88%	87%
2019	46%	42%	61%	81%	90%	78%
2020	52%	31%	89%	88%	74%	100%
2022	40%	24%	68%	73%	77%	86%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	39%	46%	63%	71%	81%	75%
2018	34%	38%	73%	71%	75%	81%
2019	40%	23%	43%	78%	81%	53%
2020	23%	31%	55%	68%	58%	67%
2022	29%	15%	47%	66%	55%	70%

Figure 75: Last trip – Changes in satisfaction with waiting time Q54

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2013	73%	-	-	-	-	-	-	-	-
2014	74%	-	-	78%	-	-	89%	-	-
2015	73%	-	-	75%	-	-	75%	-	-
2016	68%	80%	0%	80%	88%	-	90%	100%	-
2017	83%	90%	87%	83%	89%	100%	87%	96%	100%
2018	84%	90%	90%	81%	87%	85%	78%	82%	79%
2019	84%	88%	92%	87%	94%	92%	88%	90%	92%
2020	80%	89%	89%	94%	96%	91%	74%	87%	100%
2022	87%	87%	92%	87%	84%	78%	84%	62%	100%

Figure 77: Last trip – Change in fares paid [Excluding 'others paid / can't recall'] Q59

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			Less than $40		
2017	25%	49%	3%	64%	83%	12%
2018	22%	43%	2%	54%	78%	4%
2019	24%	43%	8%	58%	75%	16%
2020	25%	50%	0%	62%	85%	0%
2022	13%	34%	0%	56%	73%	0%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			Less than $40		
2017	53%	69%	6%	90%	89%	6%
2018	46%	49%	4%	83%	83%	4%
2019	43%	52%	7%	80%	84%	7%
2020	34%	56%	0%	75%	89%	0%
2022	23%	44%	0%	81%	78%	8%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			Less than $40		
2017	58%	59%	33%	86%	86%	50%
2018	50%	40%	7%	80%	73%	19%
2019	54%	53%	0%	82%	85%	19%
2020	55%	38%	17%	89%	86%	17%
2022	47%	31%	63%	84%	71%	63%

Figure 83: Last trip – Change in satisfaction with fares (if aware of amount) Q61

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2013	50%	0%	0%	0%	0%	0%	0%	0%	0%
2014	50%	0%	0%	60%	0%	0%	66%	0%	0%
2015	53%	0%	0%	55%	0%	0%	57%	0%	0%
2016	59%	81%	0%	69%	83%	0%	66%	88%	0%
2017	61%	89%	81%	69%	92%	88%	74%	100%	100%
2018	61%	88%	94%	63%	88%	84%	61%	84%	94%
2019	71%	85%	97%	68%	90%	85%	66%	64%	100%
2020	61%	84%	90%	68%	91%	100%	56%	91%	100%
2022	70%	80%	87%	65%	86%	56%	76%	70%	100%

Figure 85: Last trip – Change in overall Satisfaction with last trip Q62

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	82%	94%	83%	89%	97%	90%	88%	96%	100%
2018	83%	94%	95%	84%	92%	91%	83%	89%	95%
2019	85%	92%	95%	93%	92%	92%	92%	85%	100%
2020	78%	93%	80%	94%	97%	91%	86%	90%	100%
2022	83%	90%	96%	83%	89%	87%	89%	79%	100%

Figure 87: Last trip – Change in impact on likelihood to re-use the transport service again Q63

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	6%	51%	39%	11%	76%	40%	17%	58%	100%
2018	8%	45%	67%	13%	58%	65%	0%	49%	61%
2019	10%	40%	65%	23%	46%	41%	23%	31%	59%
2020	-2%	14%	32%	5%	18%	69%	0%	21%	43%
2022	15%	18%	32%	20%	29%	45%	22%	-2%	33%

Appendix F: Methodology check in 2017

Details of a small concurrent survey using the previous survey method in 2017, to calibrate the revised survey and methodology that has been used from 2017-2022.

Measurement of usage of point-to-point transport services is one of the key purposes of the survey. The change in method for measuring usage from a 'one-step' process of measuring awareness, usage and frequency to an iterative three-step process in 2017 resulted in an apparent discontinuity in the longer-term track. To confirm that underlying trends continued to operate and to assist in calibrating the new methodology to the older data, IPART conducted a small-scale version of the previous methodology concurrently with the new survey in November 2017.

This exercise enabled us to look at data from the two methodologies at the same point in time – represented by the solid vertical line in the chart below. In November 2017 this gave us the confidence to conclude that although the new methodology yields a lower estimate of usage at a weekly and 6-monthly level, the underlying paradigm remained. The addition of the subsequent data using the new methodology confirmed this, with the results showing a continuation of the steady increase in use of rideshare, alongside the more consistent level of use of taxis.

The 2019 survey showed an apparent slowing of the growth of rideshare into the NSW market. In the 2019 report it was speculated that 2020 would reveal more of the relative shape of taxi and rideshare usage. The impact of COVID has interfered with the natural trajectories, but it is clear that in 2020 taxi use declined far more sharply than did rideshare use – but it also bounced back slightly more in 2022.