ORIMA

Point-to-Point Transport Passenger Survey 2024

Prepared for

IPART Independent Pricing and Regulatory Tribunal | NSW

November 2024

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Summary

Overall, there is **slightly higher confidence that taxis would successfully pick up or drop off respondents at their home compared to rideshare**. Confidence in both services is similar in central and eastern Sydney, but confidence in taxis is considerably higher in western Sydney and outside of Sydney. **Satisfaction with the available services reflects this pattern**. Overall, 59% of respondents in Sydney and 60% of those outside Sydney were at least partially satisfied with the taxi service available where they lived, compared to 61% and 41% respectively for rideshare services.

Despite this, reported usage of rideshare is higher than for taxis in all Sydney zones, and similar to taxis in all but the most regional areas outside of Sydney. In total 55% of Sydney respondents reported using a rideshare at least once in the last 6 months, compared to 46% for taxis. Outside of Sydney 43% had used a taxi in the last 6 months, and 36% had used a rideshare. It will take several more cycles of the new survey to clearly establish a new data series, but these figures are closely aligned with the 2023 survey. Greater proportions in both Sydney and non-Sydney locations reported being regular users of rideshare than of taxis – but so too did greater proportions report being non-users. This suggests that people who do use rideshare do so somewhat more frequently.

There is considerable latent demand for P2P transport, with substantial proportions who would ideally like to use both rideshare and taxis (and also public transport) more, if there were no barriers to them doing so. This was lowest for rank and hail taxis.

Across both Sydney and non-Sydney respondents **there was a perception that the taxi services available to them had gotten slightly worse** in the last 1-2 years, while **both rideshare and public transport services had improved**.

Overall satisfaction with last trips was high, with 75% of taxi users and 83% of rideshare users at least partially satisfied with their most recent trip (very similar across Sydney and non-Sydney respondents). Satisfaction with waiting times was similar (76% vs 79% respectively), but satisfaction with taxi fares was a little lower (63% vs 70). Satisfaction with fares in Sydney was similar across both services (70% for taxis and 67% for rideshare), but much lower for taxis (55%) than rideshare (76%) outside of Sydney.

Source of data

The new IPART P2P Passenger Survey was introduced in 2024. The simplified survey is now conducted across four zones within Sydney and five regions across the rest of the state.

Results are aggregated at an overall state level and at the level of Sydney and non-Sydney, as well as each of the nine geographic regions. The survey measures satisfaction and use of services, and has been designed to monitor the ability of the now largely deregulated P2P industry (primarily taxis and rideshare) to meet the needs of the NSW community. A Core Module is asked of all respondents, and then a Last Trip Module is asked only of respondents with a recent trip.

A total of 2,587 people responded to the survey over a 10 week period from July to October 2024, with 1,079 providing feedback on a recent trip (within the last 3 months).

Technical Details

The P2P transport survey is conducted online with NSW residents. It consists of a Core Module (5 minutes average duration) that measures perceptions of available taxi and rideshare services, as well as usage and preferences. For respondents who have recently used P2P transport, a 'Last Trip' module (4 minutes average) assesses their methods of obtaining the vehicle and their satisfaction with the trip experience.

The 2024 survey was conducted between 22 July and 6 October, with an approximately consistent rate of completions per week. Filtering into the last trip module was managed to achieve approximately 1,000 completions. The filtering varied between last month and last three months to keep recall as recent as possible while achieving the target sample sizes.

A total of 2,587 surveys were completed, with 1,079 last trips reported on.

P2P Passenger Survey *2024 sample sizes*	Core Module				Last Trip Module		
	Targets	Male	Female	Total	Taxi	Rideshare	Total
Sydney Metro	*1,400*	697	727	**1,424**	239	351	**590**
Central River City	*350*	177	184	**361**	62	100	**162**
Eastern Harbour City (North)	*350*	160	176	**336**	62	109	**171**
Easter Harbour City (South)	*350*	181	182	**363**	43	75	**118**
Western Parkland City	*350*	179	185	**364**	72	67	**139**
Non-Sydney	*1,100*	561	602	**1,163**	274	215	**489**
Illawarra-Shoalhaven City	*150*	76	81	**157**	33	43	**76**
Central Coast (NSW)	*150*	75	85	**160**	45	33	**78**
Lower Hunter & Greater Newcastle	*350*	175	190	**365**	62	78	**140**
Regional Towns w population 30K+	*300*	155	167	**322**	92	47	**139**
Rest of NSW	*150*	80	79	**159**	42	14	**56**
Total	*2,500*	**1,258**	**1,329**	**2,587**	**513**	**566**	**1,079**

Interlocking age x gender quotas within each of the nine locations were used to manage the overall sample.
Final results reported here are weighted at the Sydney / non-Sydney level, and at the overall state level.

Survey History

NSW Independent Pricing and Regulatory Tribunal (IPART) has conducted regular surveys of users of point-to-point (P2P) transport in NSW since 2012.

In 2017 a significant redesign of the survey was undertaken. The new survey retained an online format, but updated the content to measure awareness, use and satisfaction in somewhat different ways. More substantively, the survey equalised the treatment of taxis and the then-emerging rideshare industry.

As the P2P industry has become largely deregulated in NSW, the P2P survey was again significantly updated in 2024. The new survey focusses on broad satisfaction with available services across geographic regions, while retaining an in-vehicle satisfaction component.

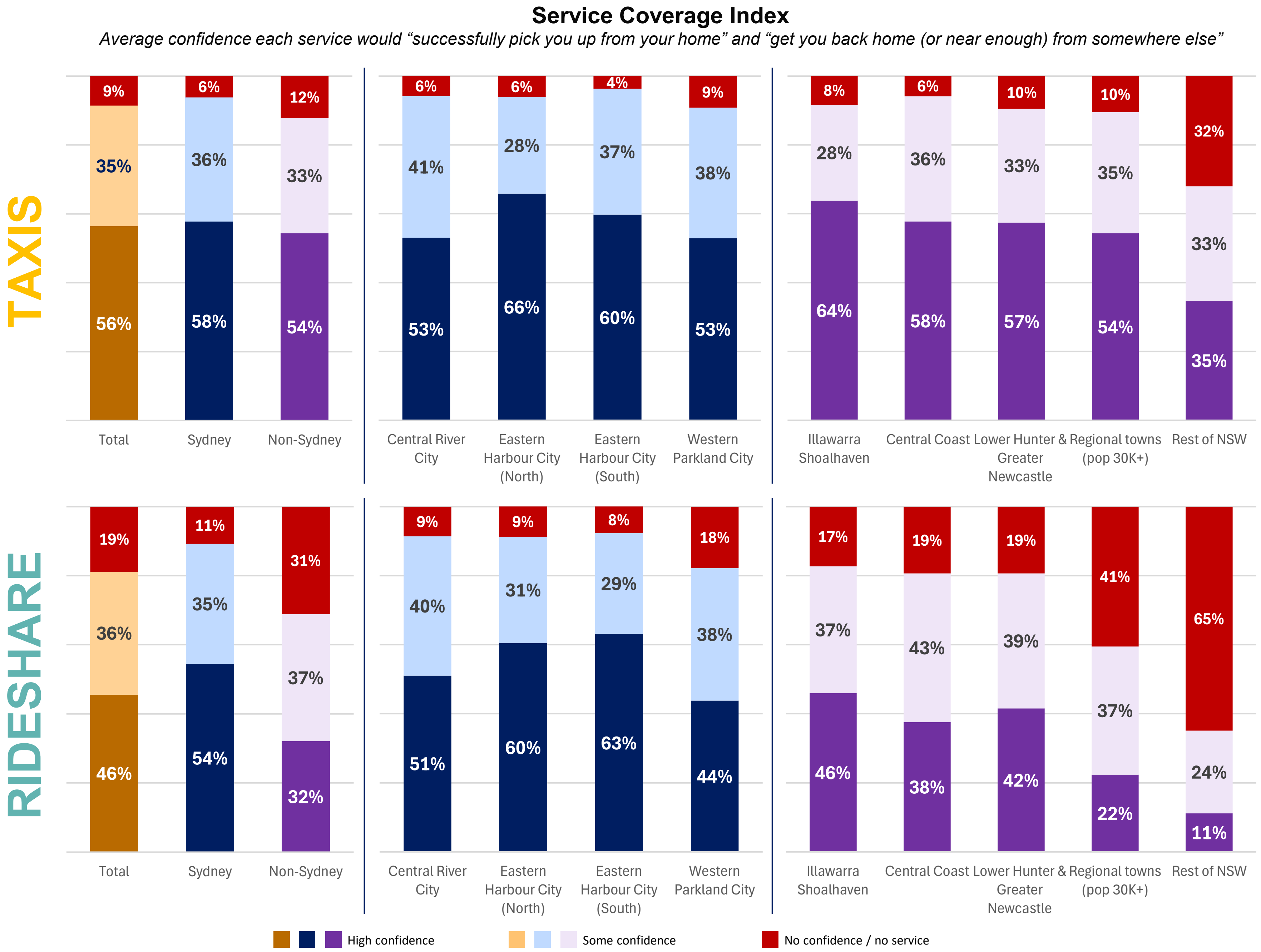
The new questions were specifically designed to allow retrospective benchmarks to be derived from historical data for some key metrics.

Section 1: Core Service Perceptions and Usage

SERVICE COVERAGE

Respondents had slightly greater confidence that they would be able to effectively use taxis than rideshare to get to or from where they live.

Expectations of rideshare coverage were most similar to taxis in central and eastern Sydney, but lower everywhere else.



SATISFACTION WITH AVAILABLE SERVICE

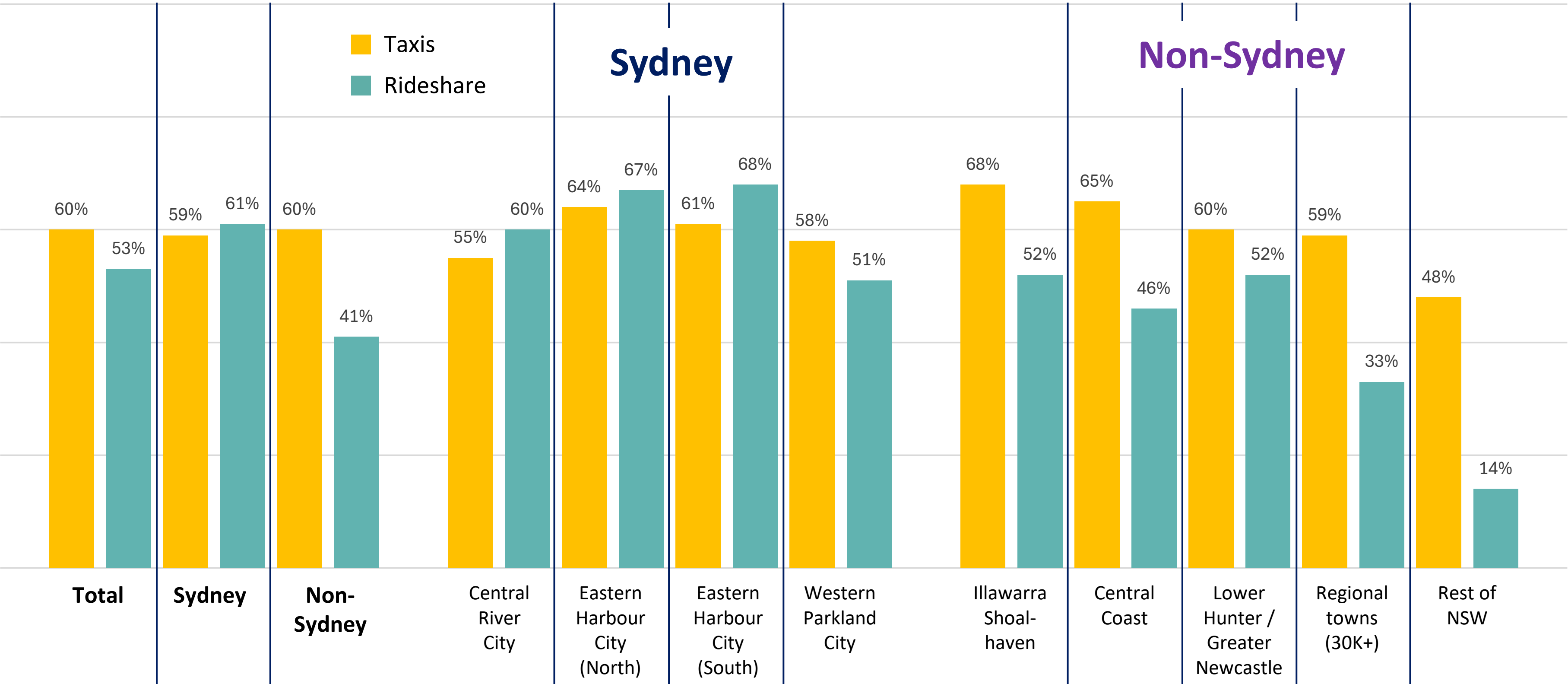
Overall satisfaction with available taxi services is slightly higher than rideshare services, but the balance is very different.

59-60% of respondents in both Sydney and non-Sydney locations were at least partially satisfied with the taxi service available – whereas satisfaction with available rideshare service was much higher in Sydney (61%) than outside of Sydney (41%).

Satisfaction with both services declines in more regional areas and away from the Eastern Harbour City areas in Sydney.

Satisfaction with available service

% Very Satisfied + Satisfied + Partially Satisfied



	Total		Sydney		Non-Sydney		Central River City		Eastern Harbour City (North)		Eastern Harbour City (South)		Western Parkland City		Illawarra Shoal-haven		Central Coast		Lower Hunter / Greater Newcastle		Regional towns (30K+)		Rest of NSW	
2022/23 "Benchmark"	**59%**	66%	**58%**	70%	**59%**	54%	**60%**	68%	**61%**	74%	**56%**	71%	**57%**	64%	**61%**	61%	**57%**	54%	**62%**	65%	**59%**	41%	**54%**	33%

"**Relative Benchmarking**": A benchmark indicator of relative satisfaction with service levels has been derived from the previous survey methodology. The benchmarks cannot be directly compared to the current results due to fundamental differences in the surveys, but the *relative* satisfaction across locations can be considered. Previous respondents were retrospectively allocated to their respective region in the new survey. The score shown is the average from 2022 and 2023 who were satisfied (using a 5-point rather than the current 7-point scale). Note that the 22/23 "benchmark" scores exclude those who said "can't say", which includes many of those who were not aware of a service operating in their area. No "can't say" option is provided in the new survey – encouraging people who do not have a service to report how satisfied or dissatisfied they are about that. This appears to have primarily affected rideshare service satisfaction scores, where coverage was lower – and the taxi benchmark scores are generally within a few percentage points of the current results.

USAGE

The proportions of respondents reporting using booked taxis and rank & hail taxis is very similar in Sydney, with booked being slightly more common outside of Sydney. 25% of Sydney respondents reported using any taxi in the last month, and 46% in the last six months (unchanged from 46% in the 2023 P2P survey). These figures were 19% in the last month and 43% in the last six months (higher in the new survey compared to 34% in 2023) for non-Sydney respondents.

A third of respondents in Sydney reported using a rideshare in the last month, with just over half doing so in the last six months (55%, compared to 54% in the 2023 P2P survey). Unlike taxi use in non-Sydney areas that was somewhat higher in the new survey compared to 2023, the 36% of non-Sydney respondents who reported using rideshare in the last six months was in line with the 2023 survey (37%).

Substantial minorities reported failed attempts to get P2P rides across all service types and locations in the last six months (19-30%).

Usage of P2P Transport

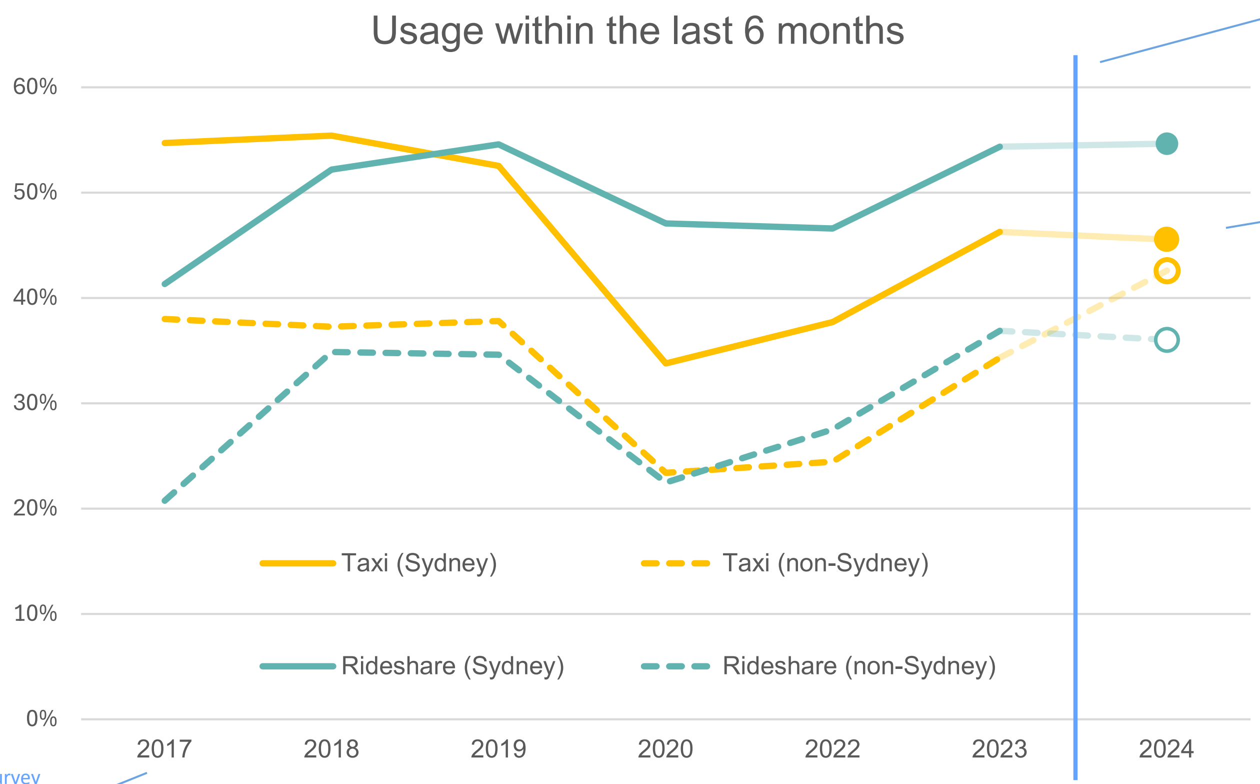
Public Transport use shown for reference

	Used in last month					Used in last 6 months					Failed attempt in last 6 months			
	Booked Taxi	Rank & hail taxi	*Any taxi^*	Ride-share	Public transport	Booked Taxi	Rank & hail taxi	*Any taxi^*	Ride-share	Public transport	Booked Taxi	Rank & hail taxi	Ride-share	Public transport
Sydney Metro	**18%**	**18%**	***(25%)***	**33%**	**71%**	**36%**	**36%**	***(46%)***	**55%**	**87%**	**23%**	**25%**	**30%**	
Central River City	18%	16%	*(22%)*	30%	74%	39%	35%	*(46%)*	53%	89%	28%	26%	32%	
Eastern Harbour City (North)	16%	17%	*(23%)*	34%	79%	34%	38%	*(48%)*	55%	92%	17%	17%	22%	
Easter Harbour City (South)	19%	20%	*(28%)*	46%	81%	37%	40%	*(48%)*	65%	92%	23%	27%	37%	
Western Parkland City	19%	20%	*(27%)*	23%	53%	33%	31%	*(41%)*	45%	75%	25%	27%	29%	
Non-Sydney	**15%**	**13%**	***(19%)***	**19%**	**32%**	**37%**	**30%**	***(43%)***	**36%**	**58%**	**21%**	**19%**	**24%**	
Illawarra-Shoalhaven City	15%	15%	*(21%)*	23%	40%	34%	32%	*(42%)*	41%	65%	20%	20%	24%	
Central Coast (NSW)	13%	14%	*(19%)*	23%	45%	34%	34%	*(46%)*	40%	71%	18%	19%	32%	
Lower Hunter & Greater Newcastle	14%	12%	*(18%)*	24%	36%	37%	29%	*(41%)*	43%	66%	23%	20%	24%	
Regional Towns w population 30K+	16%	14%	*(20%)*	13%	22%	41%	29%	*(45%)*	31%	45%	23%	18%	22%	
Rest of NSW	16%	10%	*(19%)*	11%	21%	34%	28%	*(39%)*	21%	45%	19%	17%	18%	
Total	**17%**	**16%**	***(23%)***	**28%**	**56%**	**36%**	**33%**	***(44%)***	**47%**	**75%**	**22%**	**22%**	**28%**	

^ "Any taxi" usage score derived from responses to booked + rank & hail.

USAGE
Cont.

Comparing the 'last 6 months usage' estimates from the previous P2P transport survey and the new methodology shows a strong, but not quite perfect congruence. This is normal when survey methodologies are changed, as differences in process, timing and survey questions can impact on respondent recall of behaviours and experience. In this case the data source has not changed (the same online research panel previously used is still used. However, the format of the questions has changed somewhat, and taxi usage is now split out into booked taxis and rank & hail taxis (and aggregated here). The survey is now conducted over a much longer time period (in 2024 over 10 weeks instead of 2-3 in recent surveys). The differences between the 2017-2023 results and the 2024 results would be characterised as 'methodology effects' due to the change in question sequence and format. As future years of data are added to the tracking charts, it would be expected that a coherent new track will emerge that can be intuitively connected to the historical data.



The change in methodology should be considered as a temporary break in the data series until such time as a new data series is established.

The previous major P2P survey methodology review occurred prior to the 2017 survey.

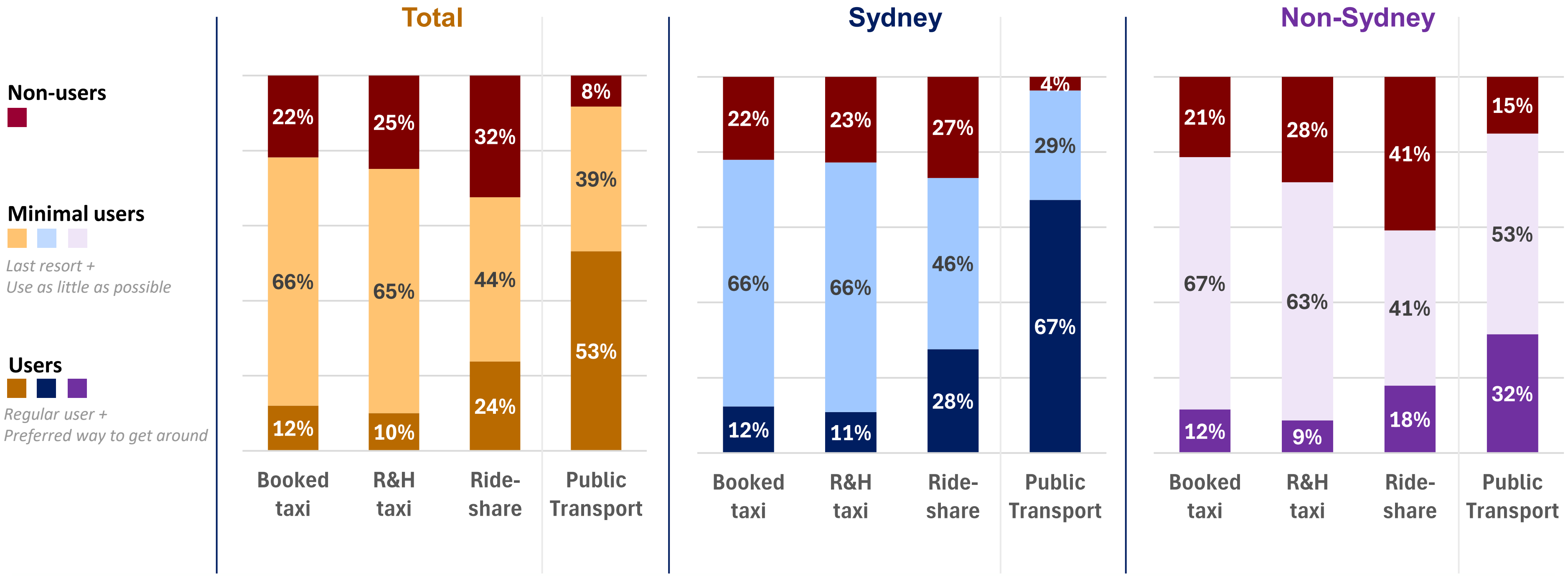
The reported use of taxis in Sydney and rideshare in both Sydney and non-Sydney locations was very similar to that seen in the 2023 P2P survey.

Use of taxis outside of Sydney was higher than in 2023 – but more consistent with the post-COVID recovery trend that had been observed in 2022 and 2023.

It will only be with the addition of further cycles of survey data that the new patterns and connection to the historical data will be clearly understood. However, it is clear that the broad usage estimates generated by the new survey are closely aligned to those from the previous survey.

PREFERRED USAGE

While service levels of taxis appear more consistent than rideshare, a greater proportion of respondents reported themselves to be regular users of rideshare services – even outside of Sydney; though more are also non-users of rideshare. Usage of rank and hail was approximately equal to booked taxis. There is considerable 'latent demand' for all point-to-point (and public) transport services, with more respondents who would ideally increase their use of the services if all barriers were removed.



Lots of things affect how much people use these types of transport services – including being able to access the service when and where they want to use them, and the cost. **If none of these were a barrier for you, ideally, how much would you like to use these transport services in your day-to-day life?**

	Total: Booked taxi	Total: R&H taxi	Total: Ride-share	Total: Public Transport	Sydney: Booked taxi	Sydney: R&H taxi	Sydney: Ride-share	Sydney: Public Transport	Non-Sydney: Booked taxi	Non-Sydney: R&H taxi	Non-Sydney: Ride-share	Non-Sydney: Public Transport
Less	17%	19%	19%	9%	19%	21%	18%	8%	13%	17%	19%	10%
Same	50%	53%	46%	44%	48%	51%	44%	44%	53%	57%	50%	46%
More	33%	27%	35%	46%	33%	28%	37%	48%	33%	26%	32%	44%
Differential	+16%	+8%	+16%	+37%	+14%	+7%	+19%	+40%	+20%	+9%	+13%	+34%

PERCEPTIONS

As seen in the previous point-to-point transport survey, respondents continue to perceive a stronger trajectory for rideshare services compared to taxis. A positive nett differential of around +10-20% of respondents in all areas felt that rideshare services had improved to some extent in the last 1-2 years (and public transport services were viewed similarly), while there was a small nett negative differential for taxi services. The value for money of both taxis and rideshare was moderate, with a slightly more positive view of rideshare in Sydney and a slightly more positive view of taxis outside of Sydney. Respondents in Sydney were nearly twice as likely to have a preference for using rideshare than taxis (41% vs 22%), while those outside of Sydney were marginally more likely to have a preference or taxis (33% vs 29%).

	Change in last 1-2 years *% better minus % worse*			Value for money *% Good + OK*		Preference for using *Excludes either / neither*	
	Taxi	Rideshare	Public transport	Taxi	Rideshare	Taxi	Rideshare
Sydney Metro	**-2%**	**17%**	**19%**	**51%**	**61%**	**22%**	**41%**
Central River City	3%	20%	26%	53%	63%	21%	37%
Eastern Harbour City (North)	-8%	10%	16%	48%	59%	19%	44%
Easter Harbour City (South)	-5%	17%	17%	51%	69%	18%	49%
Western Parkland City	3%	19%	16%	50%	53%	31%	33%
Non-Sydney	**-3%**	**12%**	**3%**	**52%**	**47%**	**33%**	**29%**
Illawarra-Shoalhaven City	5%	21%	7%	43%	51%	27%	35%
Central Coast (NSW)	-2%	17%	4%	60%	53%	28%	30%
Lower Hunter & Greater Newcastle	-3%	12%	-4%	52%	55%	31%	35%
Regional Towns w population 30K+	-6%	11%	10%	52%	43%	37%	23%
Rest of NSW	-9%	0%	2%	50%	30%	39%	18%
Total	**-2%**	**15%**	**13%**	**51%**	**56%**	**26%**	**36%**

A positive nett differential indicates more people feel a service has got better than feel it has got worse; while a negative nett differential indicates more people feel the service has got worse than better.

Section 2: Last Trip Experience

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LAST TRIP STATISTICS

Overall around half the last trip experiences reported on were taken in a taxi (47%) and half in a rideshare (53%). In Sydney 60% of last trips were rideshare, while outside of Sydney 56% were in a taxi.

Rideshare had slightly higher levels of overall trip satisfaction (83% vs 75% for taxis), satisfaction with waiting times (79% vs 76%) and with fares paid (70% vs 63%). The difference in overall satisfaction was consistent across Sydney and non-Sydney locations, as was the very slight advantage in satisfaction with waiting times. Satisfaction with fares was more variable, and mostly seen in outside of Sydney – even in those regions where rideshare use was relatively lower.

Satisfaction is measured using a the standard NSW Government 7-point scale, with reported satisfaction being the total of 'very satisfied + satisfied + partially satisfied'.

	Last trip taken was in a…		Satisfaction with waiting time		Satisfaction with fare paid		Trip satisfaction	
	Taxi	Rideshare	Taxi	Rideshare	Taxi	Rideshare	Taxi	Rideshare
Sydney Metro	**40%**	**60%**	**78%**	**80%**	**70%**	**67%**	**74%**	**83%**
Central River City	38%	62%	73%	84%	70%	68%	67%	87%
Eastern Harbour City (North)	36%	64%	82%	77%	67%	67%	79%	80%
Easter Harbour City (South)	36%	64%	81%	79%	68%	68%	74%	87%
Western Parkland City	52%	48%	75%	80%	75%	65%	78%	75%
Non-Sydney	**56%**	**44%**	**74%**	**76%**	**55%**	**76%**	**75%**	**84%**
Illawarra-Shoalhaven City	44%	56%	82%	77%	59%	83%	82%	77%
Central Coast (NSW)	58%	42%	80%	76%	64%	69%	80%	91%
Lower Hunter & Greater Newcastle	44%	56%	79%	79%	61%	73%	79%	89%
Regional Towns w population 30K+	66%	34%	69%	74%	49%	79%	70%	79%
Rest of NSW	75%	25%	65%	72%	52%	79%	67%	86%
Total	**47%**	**53%**	**76%**	**79%**	**63%**	**70%**	**75%**	**83%**

Thank you

We would also like to acknowledge and thank all the participants who were involved in the research for their valuable contribution and input.

This project was conducted in accordance with the international quality standard ISO 20252 and the Australian Privacy Principles contained in the Privacy Act 1988.

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