



REPORT TO THE ACT GOVERNMENT

EVALUATION OF THE 2015 INNOVATION REFORMS TO THE ON-DEMAND TRANSPORT INDUSTRY IN THE ACT

(INCLUDING TAXIS, HIRE CARS AND RIDESHARE)

RESULTS OF COMMUNITY ENGAGEMENT

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I. INTRODUCTION

In October 2015 the ACT Government introduced reforms to the 'on-demand transport industry', otherwise known as taxis and hire cars, to allow for the regulated introduction of rideshare services in the ACT. At the time of introduction, the government committed to an evaluation of the reforms after a period of two years.

The evaluation involved a range of community and stakeholder engagement activities, research, analysis and commissioned work to support a report government. This is the report of the community survey component of the evaluation's stakeholder engagement.

II. METHODOLOGY

An essential component of the evaluation process was engagement with on-demand transport users, industry participants and the broader ACT community, to understand the impact of the reforms on these various parts of the on-demand transport market.

Eight surveys were conducted with various stakeholders to explore the impact of the reforms, with over 2,500 survey responses received. These included:

Stakeholder Group	Respondents
Quick poll on social media channels	1641
Taxi, hire car and rideshare users	166
Taxi Subsidy Scheme participants	678
Rideshare drivers	21
Taxi owners and drivers	26
Hire car owners and drivers	6
Perpetual taxi licence holders	84
Hotels	15
Total	2637

The eight stakeholder surveys included multiple choice and free-text questions, and captured respondent demographics to better understand the range of people who are either using or contributing to on-demand transport services. At the beginning of each survey, respondents were asked whether their written answers could be publicly quoted as a part of the evaluation.

These surveys were part of a larger program of engagement and consultation with the community and industry, conducted from July to September 2017. This included a range of face-to-face discussions with key stakeholder representative groups and industry participants.

Survey processes included:

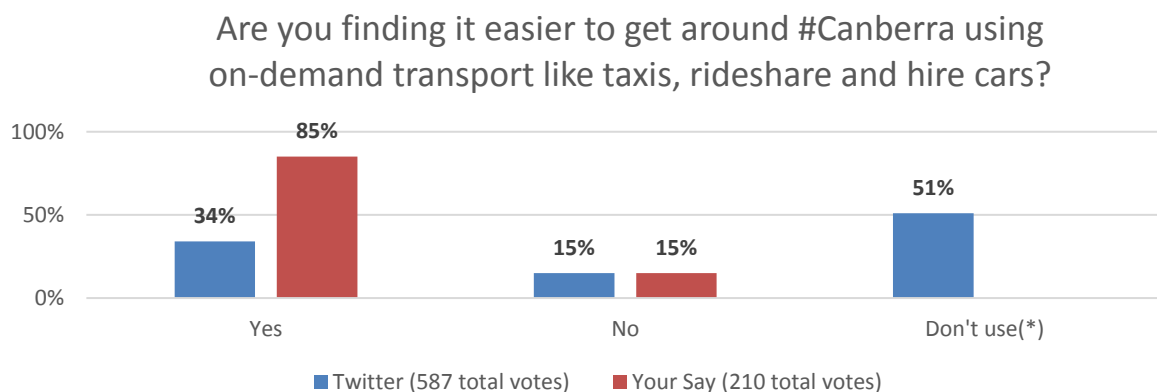
- Quick poll on ACT Government social media channels – Two questions were asked on the ACT Government Twitter asking if respondents were using rideshare services and if they were finding it easier to get around Canberra using on-demand transport. A third question was also asked on the ACT Government's YourSay website asking respondents if the introduction of rideshare and related reforms were a good thing for the ACT.
- Taxi, hire car and rideshare users – This survey was conducted through Survey Monkey and was promoted through the ACT Government's YourSay engagement channel and ACT Government social media channels. The survey captured largely quantitative data on user satisfaction, frequency of use and preferred mode of transport.
- Taxi Subsidy Scheme (TSS) participants – This survey was sent out to the participant list for the TSS and focused on people requiring accessible transport, such as people living with disabilities and older people. The survey captured largely quantitative data on user satisfaction, frequency of use, and preferred mode of transport, with qualitative data capturing user comments largely on the quality of wheelchair accessible taxi (WAT) services and the TSS.
- Rideshare drivers – This survey captured largely quantitative data on how drivers operate (hours worked per week, net earnings per hour, status of vehicle ownership) and how their experience differed from other modes if they also drove taxi and hire cars.
- Taxi vehicle owners and drivers – This survey captured quantitative data on ease of compliance, change of profit levels and hours worked since the start of reforms. The survey also captured a high response of qualitative data in the form of comments on the impact of the reforms since their introduction.
- Hire car owners and drivers – This survey focused on the experience of hire car owners and drivers, with questions similar to those asked in the taxi vehicle owners and drivers' survey.
- Perpetual taxi licence holders – This survey focused on the impact of reforms to perpetual taxi licence holders, capturing qualitative data on how purchasing costs, number of licences and other associated costs affected by the introduction of reforms.
- Hotels – This survey asked hotel operators on the quality of on-demand transport services to and from their hotels and the how their guests used these services.

Information was also sought from the 16 Australian Public Service agencies with the biggest staffing footprint in the ACT on whether they allowed their staff to access rideshare services for official travel and, if they did, the proportion of such use in 2016-17. All of the agencies provided a response.

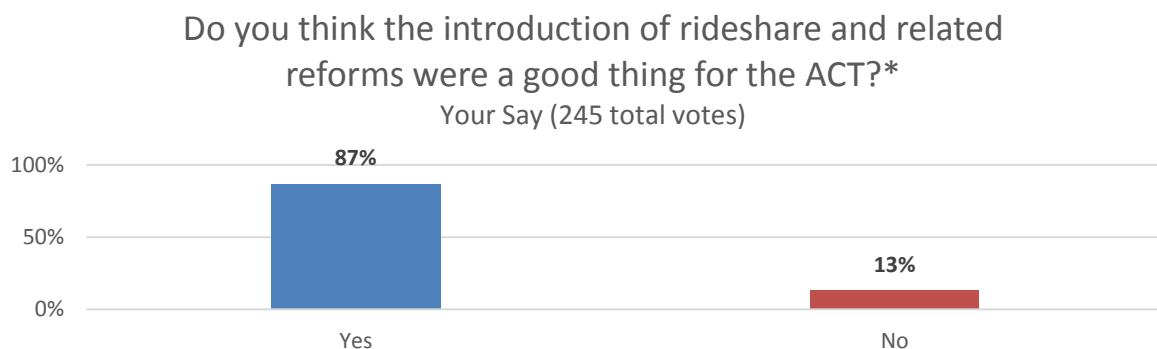
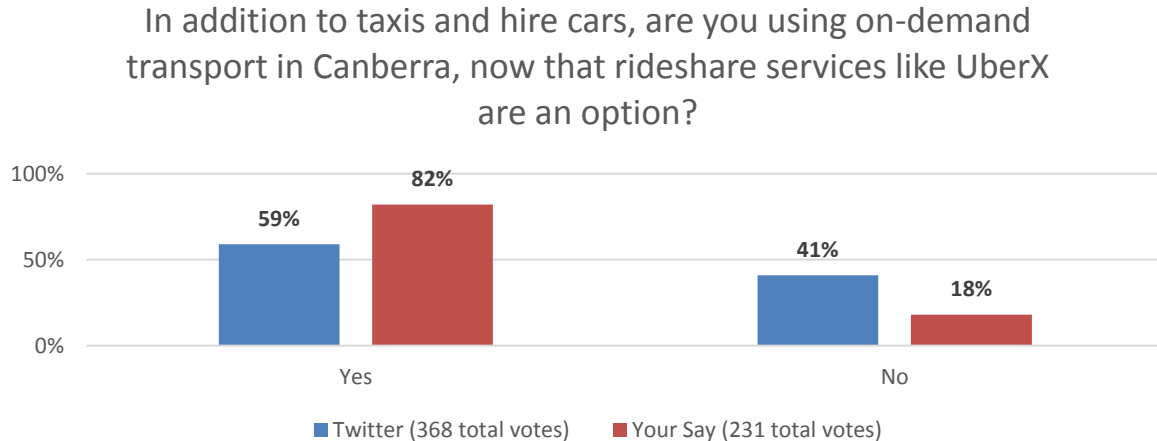
III. QUICK POLL ON ACT GOVERNMENT SOCIAL MEDIA CHANNELS

Summary of findings

Quick poll results indicated that the majority of respondents were in favour of reforms to the on-demand transport industry. The polls indicate that a majority of respondents were finding it easier to get around Canberra using on-demand services and that they were now using rideshare services.



**The "don't use" option was only a choice within the Twitter poll*



**This question was only available on ACT Government's YourSay page*

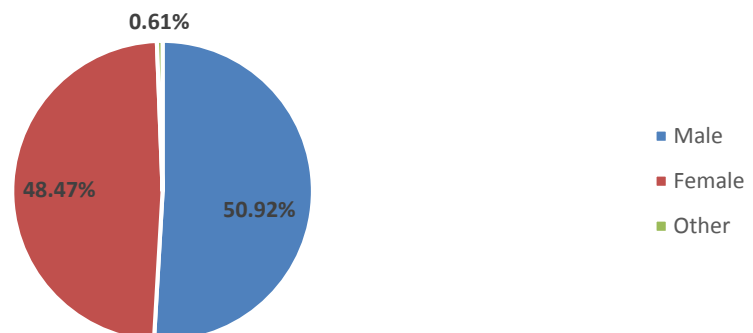
IV. TAXI, HIRE CAR AND RIDESHARE USERS

Summary of findings

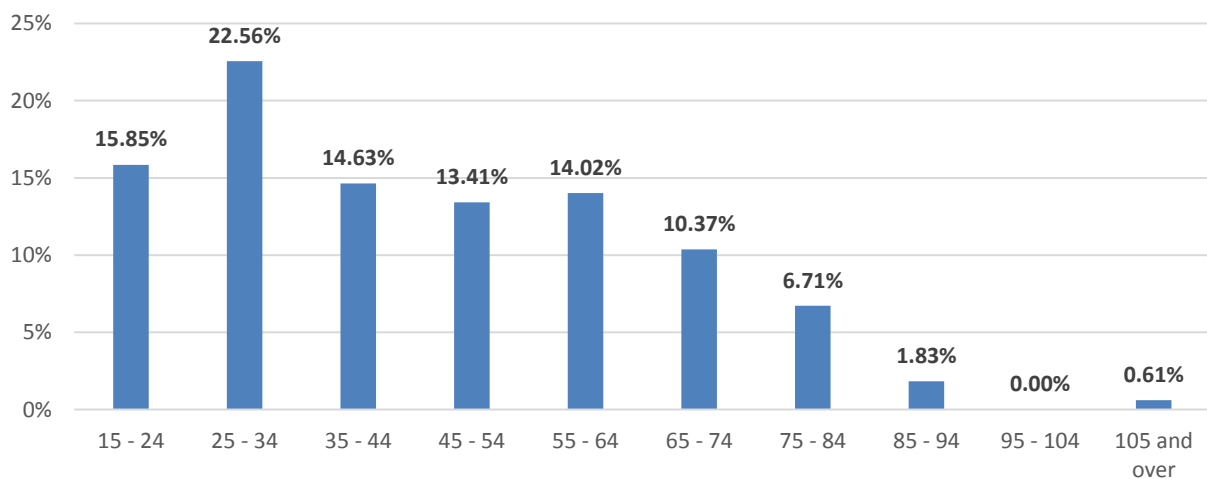
- Rideshare customers generally have higher levels of satisfaction with the level of service compared to the service offered by taxi and hire car services across all factors (availability, wait times, price, safety, driver service and disability access).
- Rideshare is the most preferred service (57%), followed by taxis (37.4%) then hire cars (5.56%).
- Compared to all other factors, respondents found pricing as the most unsatisfactory factor offered by taxi services.
- 98 respondents stated that 63% of their trips would be with taxi or hire care services if rideshare services were not available.
- 52% of respondents stated that they now used taxi services less since rideshare began in the ACT.

Demographics

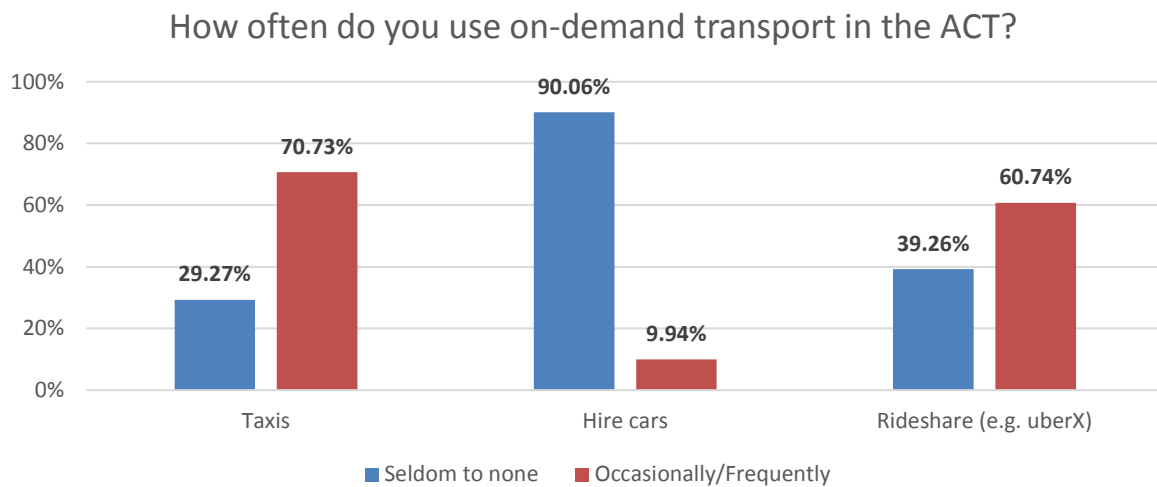
What is your gender?



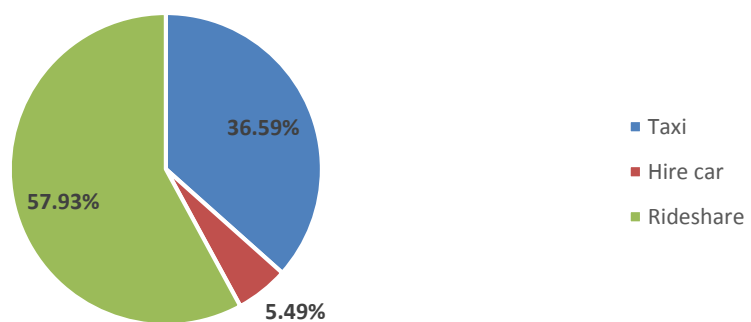
What is your age?



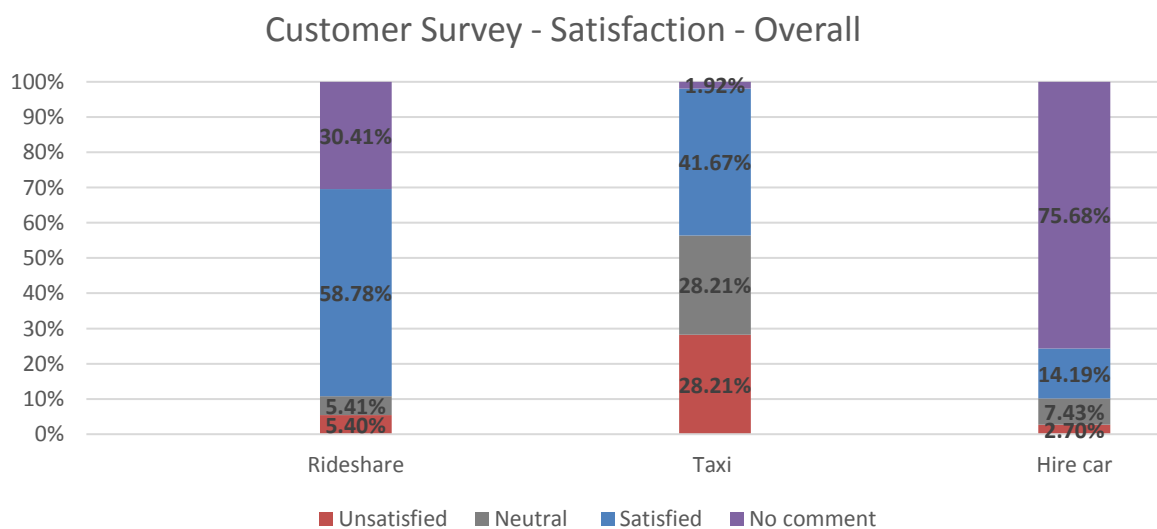
Frequency and service preference



What is your preferred service?

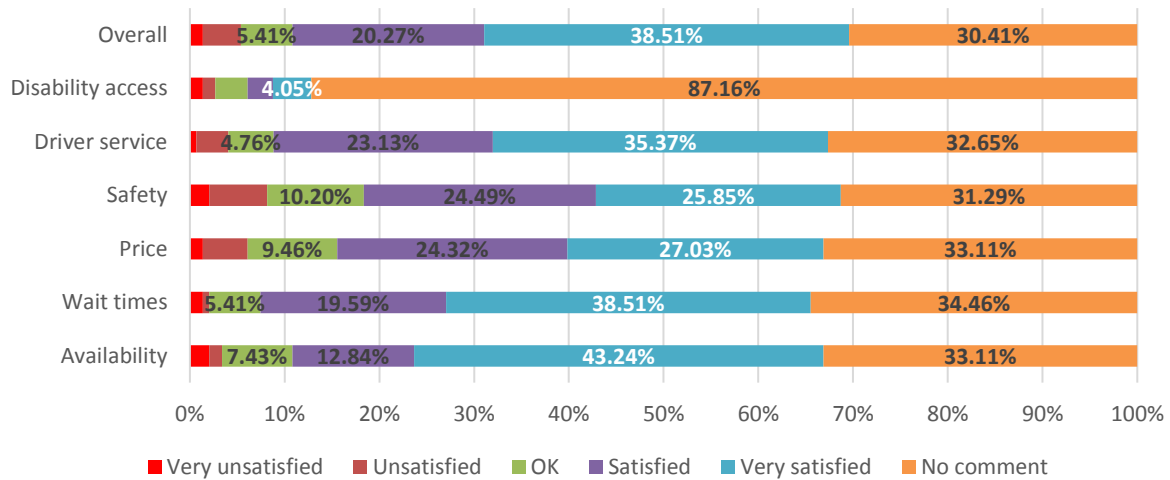


Satisfaction with ODTI services



Rideshare services

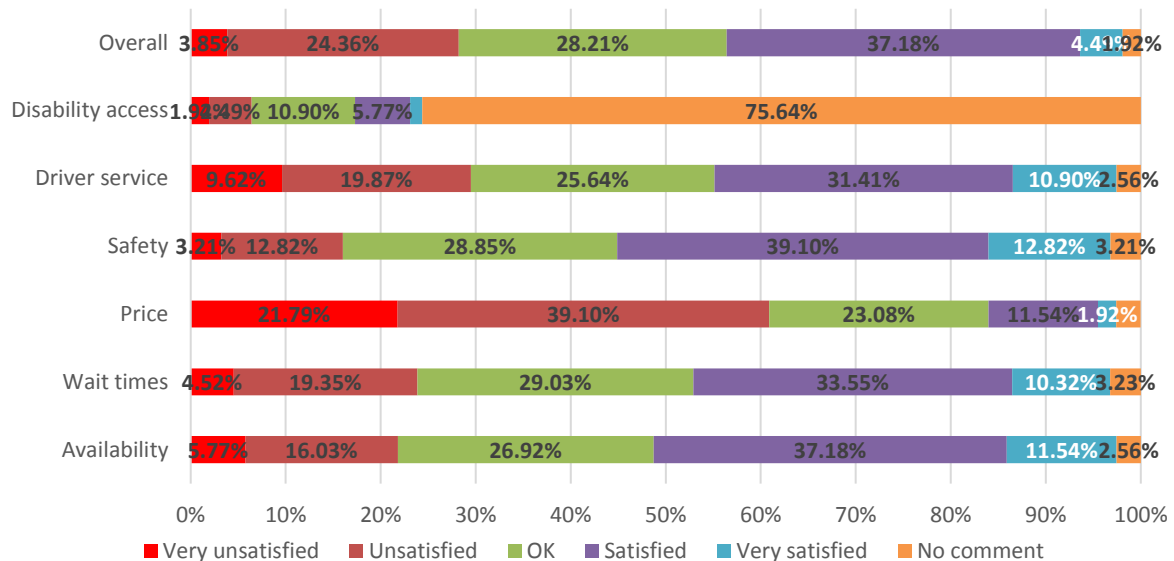
How satisfied are you with rideshare in the ACT?



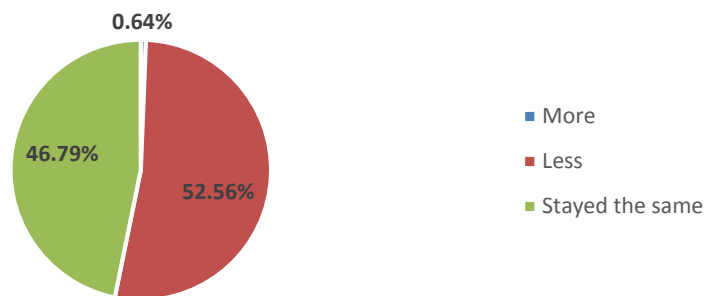
- Generally, most respondents were satisfied with the level of service provided by taxis. However respondents expressed higher levels of general 'dissatisfaction' with all factors of service (more than double in all factors) compared to rideshare.
- 61% of respondents were generally unsatisfied with price.
- 76% of respondents had 'no comment' for disability access. However, of the respondents that provided input, they were generally satisfied with disability access.

Taxi services

How satisfied are you with taxi services in the ACT?

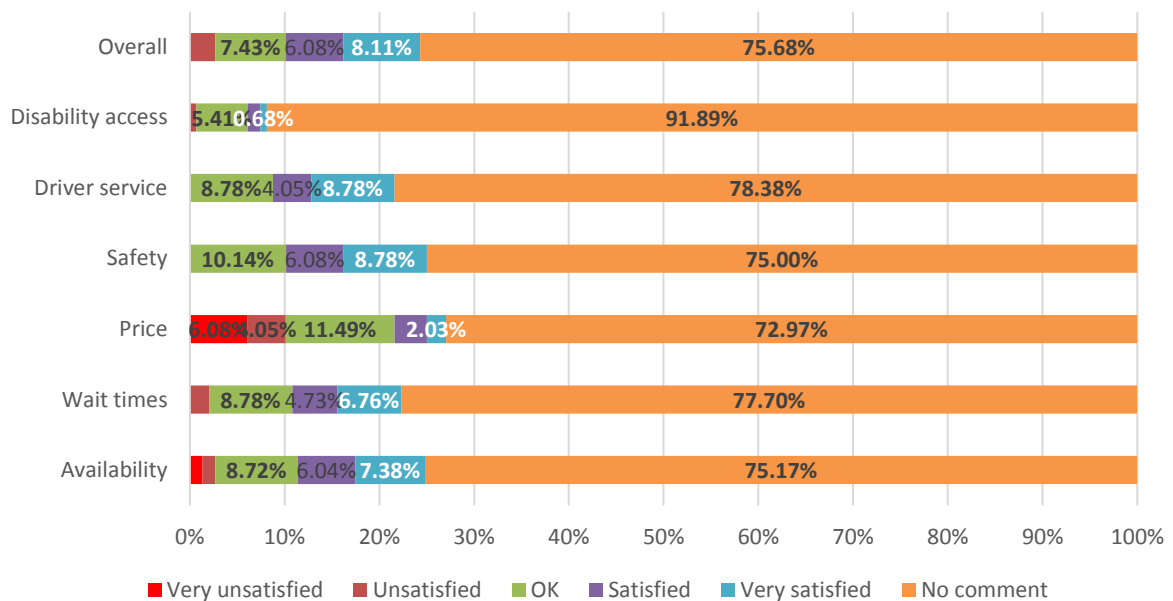


Since rideshare started in the ACT, has your use of taxis changed?

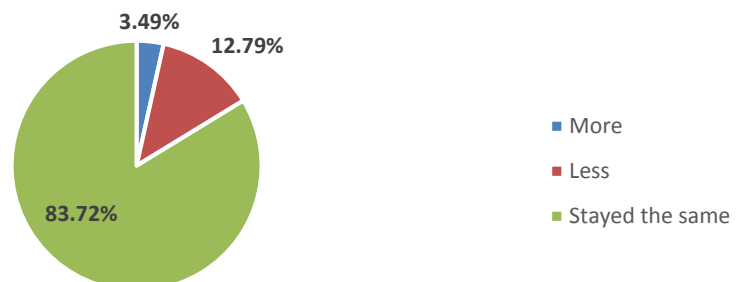


Hire car services

How satisfied are you with hire car services in the ACT?



Since rideshare started in the ACT, has your use of hire cars changed?



- Most respondents stated 'no comment' for every factor of hire car services.
- Respondents who commented saw pricing as the most unsatisfactory factor of hire car services.
- Of the respondents who commented, approximately 84% stated that their use of hire car services has stayed the same since rideshare started in the ACT.

Themes in free-text responses

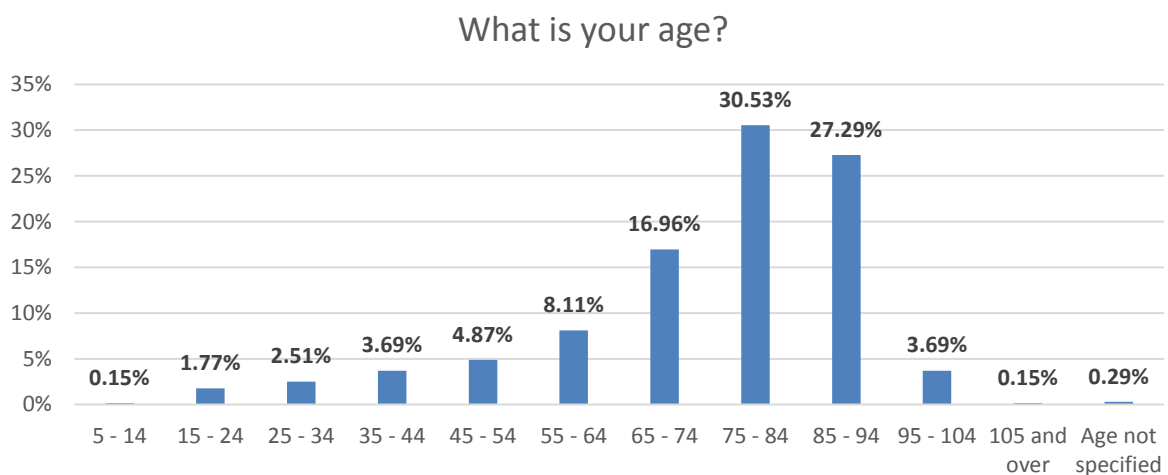
- Safety concerns regarding the use of rideshare.
- Rideshare services seen as more convenient than taxi services.
- Taxi services seen as too expensive.
- Taxi booking services less convenient than booking through rideshare apps.
- Driver odour and hygiene an issue with taxi services.
- Some respondents reported taxi drivers as being 'rude'.
- Rideshare services seen to increase mobility and accessibility across the city.

V. TAXI SUBSIDY SCHEME PARTICIPANTS

Summary of findings

- All respondents to this survey were members of the Taxi Subsidy Scheme (TSS).
- The majority of respondents (86%) were over 55 years of age, with approximately 65% of them using standard taxis or wheelchair accessible taxis (WAT) as their usual method of travel.
- Approximately 90% of respondents have not used a rideshare service, with approximately 80% stating they have no intention of using them in the future.
- Generally, most respondents have found either no change or a better level of service with WAT and standard taxi services since the start of the taxi reforms. However, pricing is still a concern.
- Qualitative results have shown a large number of respondents thankful for the TSS and WAT service.
- Comments on perceptions of drivers ranging from 'very helpful' to 'rude and unhelpful'.

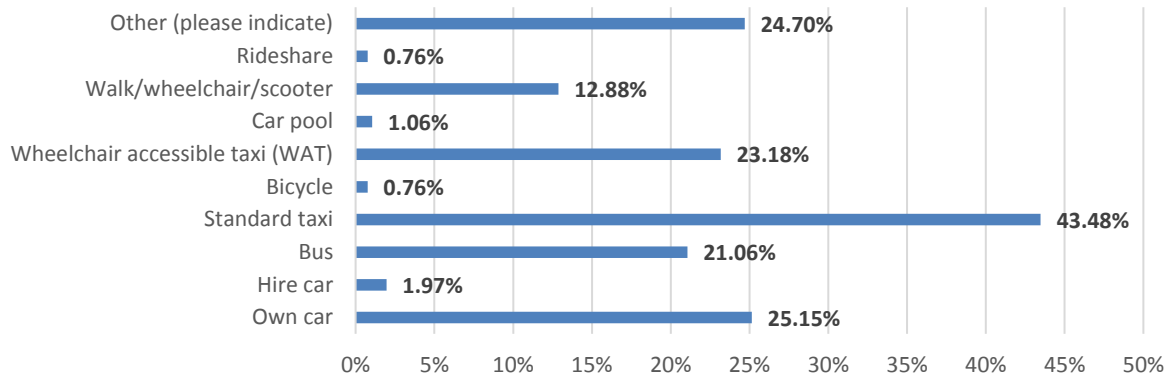
Demographics



What is your gender?



What method of transport do you usually use to travel in Canberra?

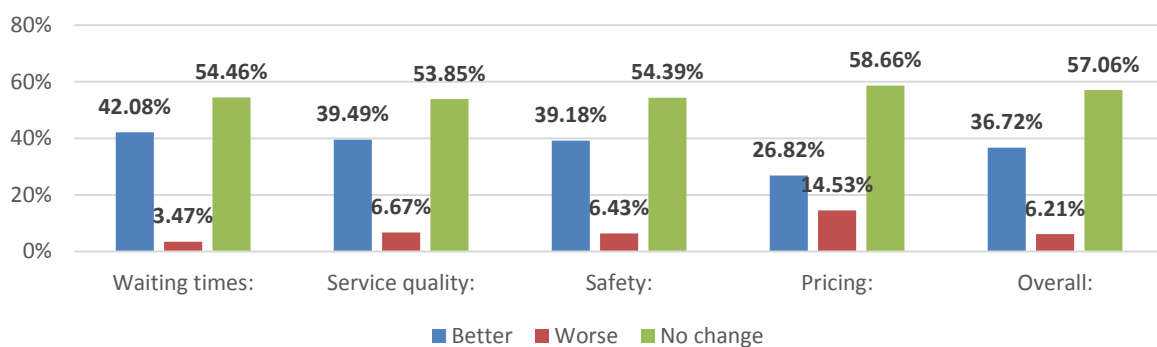


- Approximately 62% of respondents stated having a physical disability, versus other types of disabilities.
- Approximately 43% of respondents usually use standard taxis.
- Community transport was a mode of transport largely indicated in the 'other' option.

Experiences since the introduction of reforms

WATs

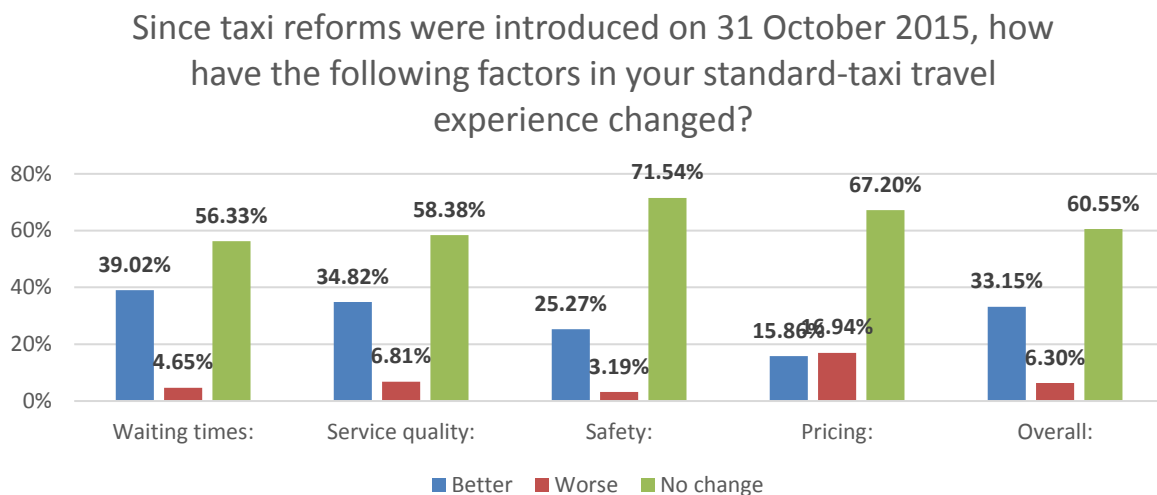
Since taxi reforms were introduced on 31 October 2015, what change have you seen to the following factors of your WAT travel experience?



- Most respondents stated that the reforms had 'no change' or made their WAT travel experience 'better' across all factors (waiting times, service quality, safety, pricing and overall experience).
- Only a small number of respondents stated that their WAT travel had become 'worse' since the introduction of reforms (nothing above 7% across all factors except for pricing).

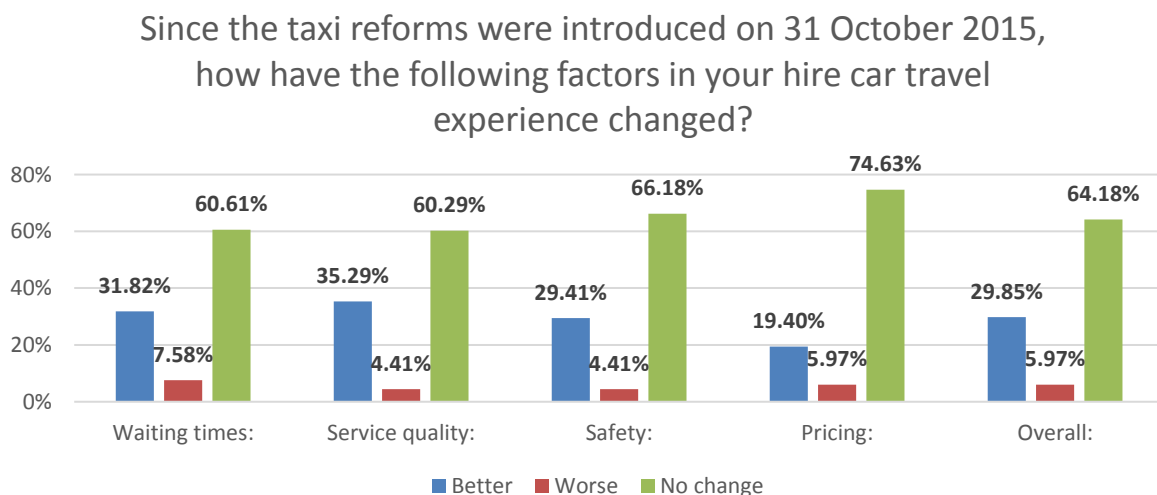
- Approximately 14% of respondents said that pricing had become worse since the reforms.
- Approximately 81% of respondents would like to see more types of WAT vehicles used in the ACT.

Standard taxi services



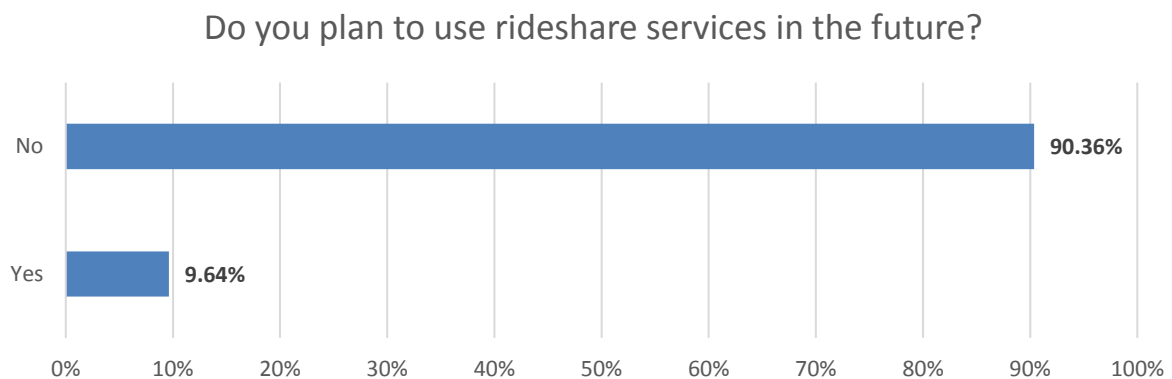
- Most respondents stated that the taxi reforms had 'no change' or made their standard-taxi travel experience 'better' across all factors (waiting times, service quality, safety, pricing and overall experience).

Hire car services



- Most respondents (around 94%) do not use hire car services.
- Most respondents stated that the taxi reforms made 'no change' to their hire car travel across all factors.

Rideshare



- Of the respondents to the question in the TSS survey, 90% stated that they would not use rideshare services in the future.
- As rideshare only started in 2015, there was no data to signify changes in service.

Themes in free-text responses

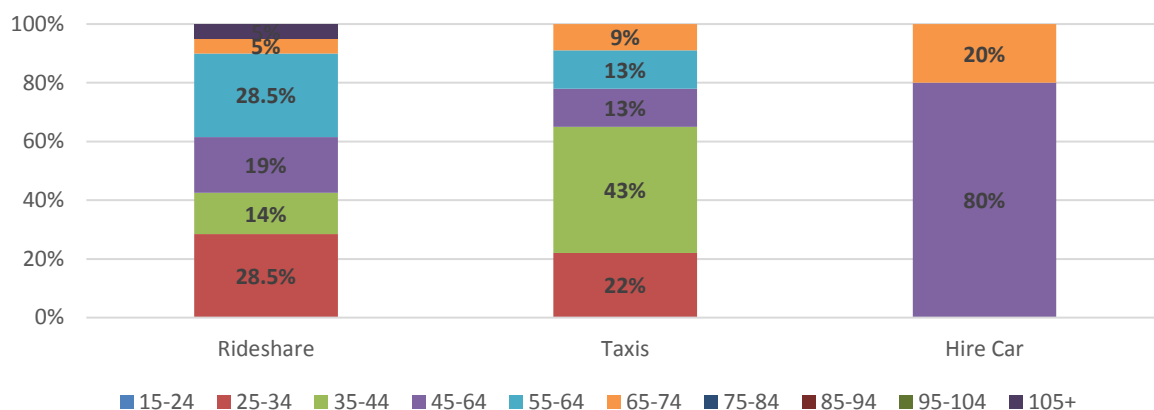
- Appreciation for the TSS and WAT services.
- Frequent usage of on-demand transport for medical appointments.
- Community transport as a popular alternative mode of transport.
- Comments on perceptions that drivers are 'very helpful' to 'rude and unhelpful'.

VI. RIDESHARE, TAXI AND HIRE CAR DRIVERS AND OWNERS

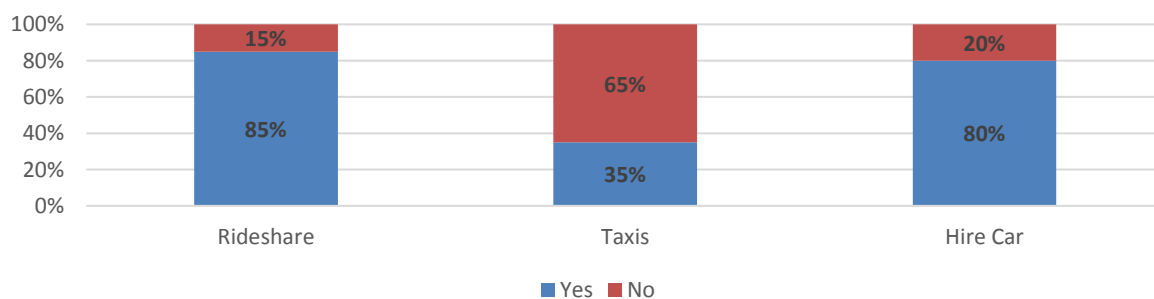
Demographics

Across the on-demand transport sector, respondent drivers were aged 35-44 (26.44%), 25-34 (22.44%) and 55-64 (22.44%) years of age, with English as a first language for the majority of rideshare (85%) and hire drivers (80%). The majority were male (93.75%).

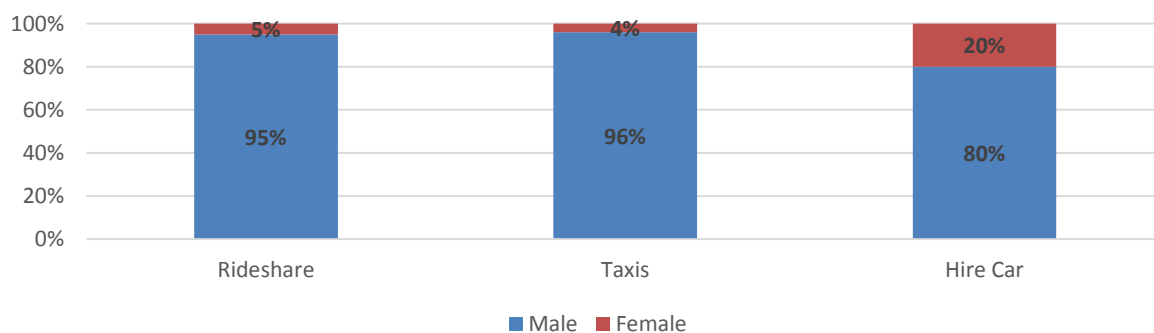
Age of ODTI Drivers



Is English your first language?



What is your gender?



Summary of findings

Rideshare drivers

- Seventeen respondents provided feedback on why they believed rideshare driving was superior to taxi or hire car driving. Of these 17 respondents, five (29%) stated that providing rideshare was a 'more flexible' arrangement, and six (35%) stated that 'being able to use their own vehicle' was an attraction. These were the two predominant factors cited.
- 55% of respondents do not provide assistance services to people with disabilities.
- Approximately 90% of respondents own the vehicle they drive for rideshare.
- 20% of respondents said they have cameras fitted in their vehicles.
- Respondents drive on average 27 hours between Monday and Friday and an average of 17 hours on weekends.
- Respondent drivers make an estimated \$16.76 an hour after expenses.
- Only one of the respondents also drives for a taxi service.
- Approximately 95% of drivers are covered by comprehensive insurance.
- One driver would like clearer guidelines to the operations of security cameras within rideshare vehicles.

Taxi owners and drivers

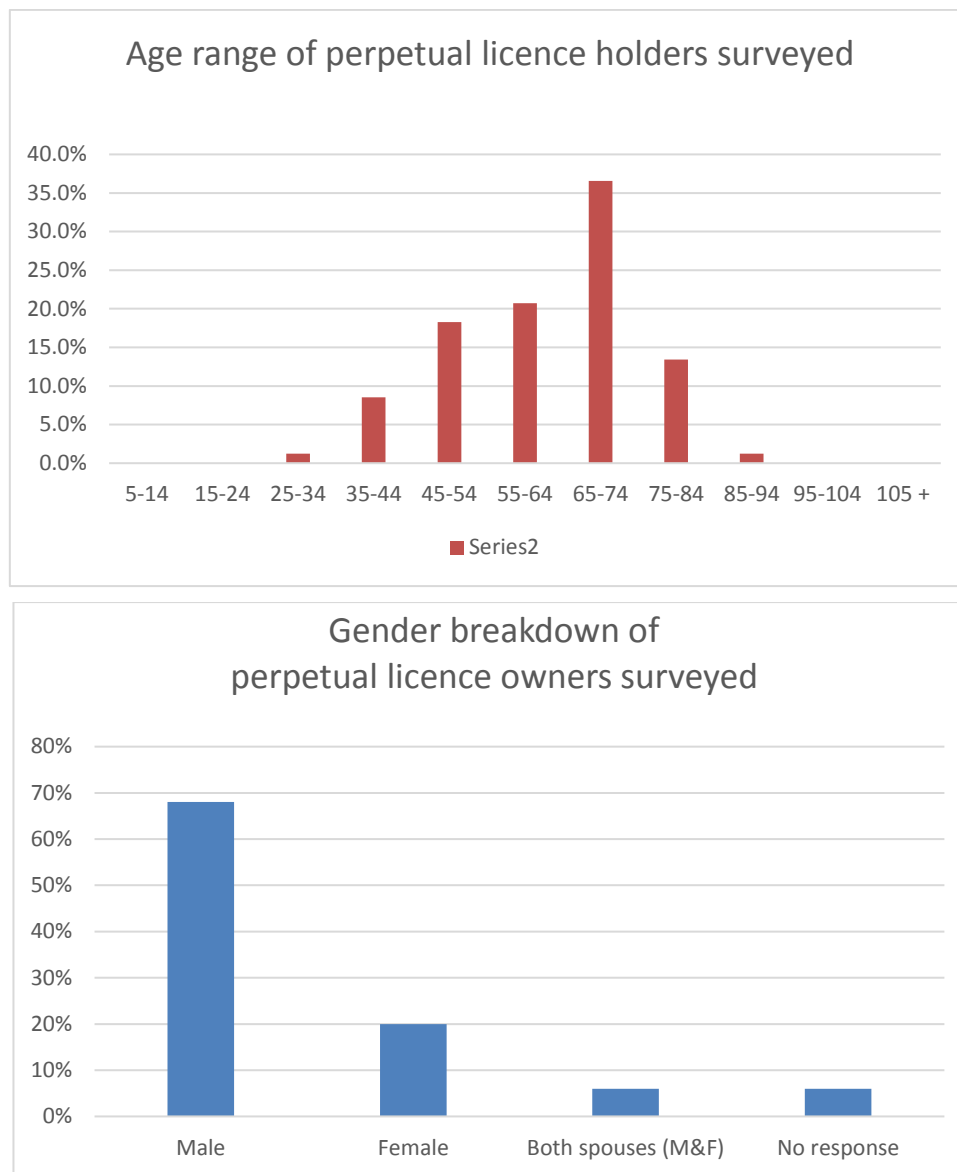
- Approximately 65% of respondents stated that English was not their first language.
- The average length of time that respondents had been either a taxi owner or driver was 10 years.
- Over 60% of respondents stated the reforms have made ease of compliance with government regulations 'harder' or 'much harder'.
- Twenty respondents provided comments on what they thought were key impacts of the reforms. Fourteen of these respondents (70%) provided comments related to reduced income and increased financial stress.
- Approximately 90% of respondents state that their financial and/or working relationship with Transport Booking Services has not improved since the start of reforms.

Hire car owners and drivers

- The low response to this survey makes it difficult to draw any meaningful analysis.

VII. PERPETUAL TAXI LICENCE HOLDERS

Demographics



Summary of findings

- Overall, respondents indicated that perpetual licences comprise substantial investments and a large proportion of all investment and real household assets.
- Lease income also forms a high proportion of retirement income streams.
- Many respondents commented that reforms to the industry are, or will, cause significant decline in the value of the licences.
- Most respondents entirely or significantly financed the acquisition of their licences.
- Respondents stated the market for licences is thin or non-existent, and unpredictable.

- Seventy-two respondents told us how many years they worked in the industry. Data ranged from zero to 52 years. The median number of years worked was 12.
- Some respondents asked for some form of compensation, citing perceptions of increasingly difficult market conditions or declining market values for their perpetual licences.
- Expectations are that lease rates will have to be negotiated down in the future.
- Perpetual licence lease income derived by respondents ranged from \$18,000 to \$24,000, per annum. Lease income was reported on by 31 respondents. The average annual lease rate among these respondents was approximately \$21,000 per annum.
- One respondent said he purchased a licence in 2012 and made enquiries about potential deregulation, and there were no indications of such an initiative.
- Fifty-seven of the 84 survey respondents (68%), stated concerns for their emotional and financial well-being caused by the uncertainty of the market on perpetual licences.
- Some respondents chose not to disclose information in response to some of the questions, citing privacy reasons.

VIII. HOTELS

Summary of findings

Abode Hotels, Gungahlin	Abode Hotels, Group Operations	Abode Hotels, Narrabundah
Abode Hotels, Tuggeranong	Brassey Hotel	Burbury Hotel
East Hotel	Hotel Realm	Hyatt Hotel Canberra
IHG Hotels Group	Little National Hotel	Mantra on Northbourne
Mercure Canberra Hotel	Parklands Hotel	Vibe Hotel

- The hotels surveyed were selected with the assistance of VisitCanberra.
- The majority of the hotels were located within the inner city and inner south, including hotels located in the major town centres and near the airport.
- Respondent hotels indicated that taxis are still the predominant choice of on-demand transport for guests with an approximate average of 46-48% services to and from hotels using taxis.
- Although measuring rideshare use was hard because bookings do not originate at the hotel desk, hoteliers estimated guest use of rideshare to and from hotels had an average use of 18-19%.
- Hotels surveyed indicated an improvement to demand and quality since the start of the reforms across the following factors:
 - 87% of respondents indicated that demand for on-demand transport services had increased at their hotels;
 - 73% of respondents indicated there was a decrease in waiting times; and
 - 73% of respondents indicated there was an increase in quality of service with on-demand transport services.
- An average of 65% of on-demand transport services included travel to and from the Canberra Airport.
- Free text comments discussed themes in relation to a general positivity for rideshare services and reduction in quality for taxi services.

IX. AUSTRALIAN PUBLIC SERVICE AGENCIES

Using data from the Australian Public Service Commission, the 16 Australian Public Service agencies with the largest staff footprint in the ACT were contacted to ascertain whether they allowed their staff to use rideshare services for official travel, and if they did, what proportion of their on-demand transport expenditure in 2016-17 was spent on rideshare services. All of the agencies contacted responded.

Attorney-General's Department	Australian Bureau of Statistics
Australian Taxation Office	Department of Agriculture and Water Resources
Department of Defence	Department of Education and Training
Department of Employment	Department of Environment and Energy
Department of Finance	Department of Foreign Affairs and Trade
Department of Health	Department of Human Services
Department of Immigration and Border Protection	Department of Industry, Innovation and Science
Department of Social Services	Department of the Prime Minister and Cabinet

The ACT Government permits the use of rideshare.

Summary of findings

- In 2016-17, these 16 agencies employed just over 43,000 people in the ACT.
- Of the agencies surveyed, 62.5% permitted their staff to use rideshare for official travel, meaning that 30,854 staff are able to use the service for official travel.
- Of the agencies which permitted the use of rideshare services, the proportion of usage ranged from 1% to 14% of their on-demand transport expenditure in 2016-17.
- Several agencies indicated they were reviewing their agency policies on rideshare and official travel.
- Some agencies expressed concern (noting their work health and safety obligations) about allowing rideshare on a national basis when some state/territory jurisdictions are yet to legalise/regulate the service.

Access to rideshare in the 16 APS agencies with the highest staff footprint in the ACT (by number of employees)

