Q13

How often has surge pricing applied in your use of hire cars?

Respondent skipped this question

Q14

How do you normally book a hire car?

Other

Q15

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

Stayed the same

Page 5: Part D - Rideshare

Q16

How satisfied are you with rideshare in the ACT?

Availability	Very satisfied
Wait times	Very satisfied
Price	Very satisfied
Safety	OK
Driver service	OK
Disability access	No comment
Overall	Satisfied

Q17

How often have you been offered a discount to the stated fare in your use of rideshare?

20

Q18

How often has surge pricing applied in your use of rideshare?

0

Q19

What share of your rideshare trips would you have taken by taxi or hire car if rideshare services were not available?

0

Q20

Do you have any additional comments on on-demand transport in the ACT?

Rideshare has encouraged me to get out of the house more as it makes it easy and affordable to go out, have a good time, and get safely home again.
I've also paid for others' rides using the Uber app when they have been stranded - something I would never have done (wouldn't be able to do) with a taxi.

COMPLETE

Collector:	**Web Link 1** (Web Link)
Started:	**Friday, August 04, 2017 11:21:27 PM**
Last Modified:	**Friday, August 04, 2017 11:24:16 PM**
Time Spent:	**00:02:48**
IP Address:	2.2(a)(ii) [redacted]

Page 2: Part A - General

Q1

May we publicly quote any written answers you have provided, in whole or in part, in this survey?

Yes. I give consent for any of my answers to be published, in whole or in part, when communicating the outcomes of this survey. I understand that my name or other formal means of my identification will not accompany any of my answers.

Q2

What is your age?

15 to 24

Q3

What is your gender?

Male

Q4

How often do you use on-demand transport in the ACT?

Taxis	Seldom to none
Hire cars	Seldom to none
Rideshare (e.g. uberX)	Occasionally

Q5

What is your preferred service?

Rideshare

Q6

Why is this above your preferred service?

Less expensive

Page 3: Part B - Taxis

Q7

How satisfied are you with taxi services in the ACT?

Availability	OK
Wait times	OK
Price	OK
Safety	Unsatisfied
Driver service	OK
Disability access	No comment
Overall	OK

Q8

How often have you been offered a discount to the maximum fare in your use of taxis?

0

Q9

How do you normally hire a taxi?

Internet

Q10

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

Less,

Please explain any changes
Almost no taxi usage now that UberX is available

Page 4: Part C - Hire cars

Q11

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

Availability	No comment
Wait times	No comment
Price	No comment
Safety	No comment
Driver service	No comment
Disability access	No comment
Overall	No comment

Q12

How often have you been offered a discount to the stated fare in your use of hire cars?

0

Q13

How often has surge pricing applied in your use of hire cars?

0

Q14

How do you normally book a hire car?

Respondent skipped this question

Q15

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

Stayed the same,

Please explain any changes never used hire cars

Page 5: Part D - Rideshare

Q16

How satisfied are you with rideshare in the ACT?

Availability	Satisfied
Wait times	Satisfied
Price	Satisfied
Safety	OK
Driver service	Satisfied
Disability access	No comment
Overall	Satisfied

Q17

How often have you been offered a discount to the stated fare in your use of rideshare?

0

Q18

How often has surge pricing applied in your use of rideshare?

20

Q19

What share of your rideshare trips would you have taken by taxi or hire car if rideshare services were not available?

60

Q20

Do you have any additional comments on on-demand transport in the ACT?

I'm really disappointed that there are no other market participants apart from Uber. I'd prefer to use other rideshare companies with higher ethical standards than both Uber and the Canberra taxi operators.

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Monday, August 07, 2017 12:23:25 AM
Last Modified: Monday, August 07, 2017 12:32:41 AM
Time Spent: 00:09:15
IP Address: 2.2(a)(ii) [redacted]

Page 2: Part A - General

Q1

May we publicly quote any written answers you have provided, in whole or in part, in this survey?

Yes. I give consent for any of my answers to be published, in whole or in part, when communicating the outcomes of this survey. I understand that my name or other formal means of my identification will not accompany any of my answers.

Q2

What is your age?

25 to 34

Q3

What is your gender?

Female

Q4

How often do you use on-demand transport in the ACT?

Taxis	Seldom to none
Hire cars	Seldom to none
Rideshare (e.g. uberX)	Frequently

Q5

What is your preferred service?

Rideshare

Q6

Why is this above your preferred service?

Other (please specify)
Less expensive, much cleaner vehicles and friendlier drivers, but most importantly as a young woman I feel much safer, particularly as Uber gives you the drivers rego and profile (so often the person driving the taxi does not match the person on the displayed taxi permit) and Uber also allows you to share your trip status with friends, so you can ensure eachother get home safely. Additionally, if you are low on cash you can still get home safely - as long as you have $1 in your account you can book an Uber (and pay later, if required). Bookings are more reliable (Taxi bookings often don't show up), and the convenience of estimating and splitting fares also make Uber far superior to taxis.

Page 3: Part B - Taxis

Q7

How satisfied are you with taxi services in the ACT?

Availability	Very unsatisfied
Wait times	Very unsatisfied
Price	Unsatisfied
Safety	Unsatisfied
Driver service	Unsatisfied
Disability access	No comment
Overall	Very unsatisfied

Q8

How often have you been offered a discount to the maximum fare in your use of taxis?

Respondent skipped this question

Q9

How do you normally hire a taxi?

Rank or hail

Q10

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

Less,

Please explain any changes
I actively avoid taxis in favour of uber

Page 4: Part C - Hire cars

Q11

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

Availability	No comment
Wait times	No comment
Price	No comment
Safety	No comment
Driver service	No comment
Disability access	No comment
Overall	No comment

Q12

How often have you been offered a discount to the stated fare in your use of hire cars?

Respondent skipped this question

Q13

How often has surge pricing applied in your use of hire cars?

Respondent skipped this question

Q14

How do you normally book a hire car?

Respondent skipped this question

Q15

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

Stayed the same

Page 5: Part D - Rideshare

Q16

How satisfied are you with rideshare in the ACT?

Availability	Very satisfied
Wait times	Very satisfied
Price	Satisfied
Safety	Very satisfied
Driver service	Very satisfied
Disability access	No comment
Overall	Very satisfied

Q17

How often have you been offered a discount to the stated fare in your use of rideshare?

Respondent skipped this question

Q18

How often has surge pricing applied in your use of rideshare?

30

Q19

What share of your rideshare trips would you have taken by taxi or hire car if rideshare services were not available?

70

Q20

Do you have any additional comments on on-demand transport in the ACT?

Respondent skipped this question

COMPLETE

Collector:	**Web Link 1** (Web Link)
Started:	**Monday, August 07, 2017 3:38:32 PM**
Last Modified:	**Monday, August 07, 2017 3:40:49 PM**
Time Spent:	**00:02:16**
IP Address:	2.2(a)(ii) [redacted]

Page 2: Part A - General

Q1

May we publicly quote any written answers you have provided, in whole or in part, in this survey?

Yes. I give consent for any of my answers to be published, in whole or in part, when communicating the outcomes of this survey. I understand that my name or other formal means of my identification will not accompany any of my answers.

Q2

What is your age?

25 to 34

Q3

What is your gender?

Male

Q4

How often do you use on-demand transport in the ACT?

Taxis	Occasionally
Hire cars	Seldom to none
Rideshare (e.g. uberX)	Occasionally

Q5

What is your preferred service?

Rideshare

Q6

Why is this above your preferred service?

Less expensive

Page 3: Part B - Taxis

Q7

How satisfied are you with taxi services in the ACT?

Availability	OK
Wait times	OK
Price	Unsatisfied
Safety	OK
Driver service	OK
Disability access	No comment
Overall	OK

Q8

How often have you been offered a discount to the maximum fare in your use of taxis?

Respondent skipped this question

Q9

How do you normally hire a taxi?

Rank or hail

Q10

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

Less

Page 4: Part C - Hire cars

Q11

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

Respondent skipped this question

Q12

How often have you been offered a discount to the stated fare in your use of hire cars?

Respondent skipped this question

Q13

How often has surge pricing applied in your use of hire cars?

Respondent skipped this question

Q14

How do you normally book a hire car?

Respondent skipped this question

Q15

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

Respondent skipped this question

Page 5: Part D - Rideshare

Q16

How satisfied are you with rideshare in the ACT?

Availability	Satisfied
Wait times	Satisfied
Price	Satisfied
Safety	Satisfied
Driver service	Satisfied
Disability access	No comment
Overall	Satisfied

Q17

How often have you been offered a discount to the stated fare in your use of rideshare?

Respondent skipped this question

Q18

How often has surge pricing applied in your use of rideshare?

Respondent skipped this question

Q19

What share of your rideshare trips would you have taken by taxi or hire car if rideshare services were not available?

Respondent skipped this question

Q20

Do you have any additional comments on on-demand transport in the ACT?

Respondent skipped this question

[redacted]"
Sent:28/08/2017 5:11 AM
To:"[redacted]
Subject:FW: Taxi booking services in ACT [SEC=UNCLASSIFIED]

[redacted]

For [redacted] comments (below) I talked to him over the phone. We discussed a range of numbers Reg Reform had found from different sources in the market (airport, hotels, rideshare-driver surveys) and I suggested to him that, at least for now, he model three outcomes of rideshare providing 15%, 20% and 25% of the total ODT supply in the market. Hire car service would be held roughly as constant of the total share, from pre-reform to post-reform, because substitution has been low to rideshare service. He will do this.

FYI, the 17 rideshare drivers surveys said the following:

1) The rideshare survey shows its respondents driving on average 27 hours per week, <u>between Monday and Friday</u>. There were 16 responses to this question.

2) The rideshare survey shows its respondents driving on average 14 hours per week, <u>between Saturday and Sunday</u>. There were also 16 responses to this question.

I imagine that people who filled out these surveys are on the higher side of driving hours.

We'll speak more about it.

[redacted]

From: [redacted]
Sent: Monday, 28 August 2017 11:37 AM
To: [redacted]
Cc: [redacted]
Subject: RE: Taxi booking services in ACT [SEC=UNCLASSIFIED]

Hi [redacted]

Interpolating from drivers to market share of demand will be very difficult, given the very large variation in active driver hours. UBER drivers would be expected to work on average a lot less than taxi drivers, but whether they average 10 hours a week, 20 hours a week or more would make a very large difference to estimated market share. Is there anything you have that can make this more precise – maybe the survey of ride share drivers?

Looks like the survey of passengers attracted mainly those using ride sharing!

[redacted]

[redacted]
Director

[redacted]
Suite 1 Level 16
1 York St
Sydney NSW 2000

www.TheCIE.com.au

From: [redacted]
Sent: Monday, 28 August 2017 11:21 AM
To [redacted]
Cc: [redacted]
Subject: Taxi booking services in ACT [SEC=UNCLASSIFIED]

[redacted]

As per our conversation last week please find below lists of Transport Booking Services, for the three modes of travel.

For clarity, we note that:

1. There are currently 323 taxi licences available for use on the road – of which 292 are standard and 31 are WAT
2. The TBSs actually operating with fleets, to-date, are:

   [redacted]

3. There is one independent taxi operating, which is standard.
4. Other TBSs listed, below, are either:
   a. Not yet operating but accredited
   b. Operating but provide booking services for rideshare (uberX, Doyengo)
   c. Providing third-party booking services only, and do not have a branded fleet (like goCatch)

Let us know if you have additional questions.

[redacted]

As at 1 July 2017

	Drivers	**Operators**	**TBS**
Taxi	1891	184	8 *Aerial –(t/a Silver Service and Canberra Elite now operating under 1 TBS) *goCatch *Cabxpress *ACTCabs

			*Glide *UZA Direct Pty Ltd *Doyengo Technologies *EBA Solutions
Rideshare	1568	1192	5 Uber ACT Cabs GoCatch Doyengo Tech Uza Direct P/L
Hire car	266	34	5 Aerial EBA Solutions ACTCabs Doyengo Tech Uza Direct P/L

2.2(a)(ii) [redacted]"
Sent:28/08/2017 1:26 AM
To:2.2(a)(ii) [redacted]
Subject:IN-CONFIDENCE: Current conditrions and recent plate releases [SEC=UNCLASSIFIED, DLM=Sensitive]
Attachments:CM17 31263 Attach A - Market conditions.doc

2.2(a)(ii) [redacted],

Please find attached background on current market conditions and discussion around recent and prospective licence releases.

It is in-confidence and sensitive.

Regards,

2.2(a)(ii) [redacted]

2.2(a)(ii) [redacted] | Senior Policy Officer
Regulatory Reform | Government Reform | Chief Minister, Treasury & Economic Development Directorate | **ACT Government**
Phone. 2.2(a)(ii) [redacted] | Email 2.2(a)(ii) [redacted]
Level 4, Canberra Nara Centre | GPO Box 158 CANBERRA ACT 2601| www.act.gov.au

ATTACHMENT A

ON-DEMAND TRANSPORT MARKET CONDITIONS

14 August 2017

As part of its taxi licence release program announced in February 2017, the ACT Government indicated that it would consider market conditions with each scheduled release. There is no single measure to determine further releases; rather, there is consideration of a range of factors to ensure that the industry is there to provide the services consumers want, at a level of price and service that makes them safe and accessible to the community. In making a decision to release additional licences, there are a breadth of matters and stakeholder interests to balance.

Market conditions considered:

- Consumer outcomes
    - price competition – advertised fares, average fares
    - service quality – consumer perceptions, waiting times (average, traditional performance benchmarks, geographic), complaints/service ratings
- Market demand
    - hirings – booked, rank and hail
    - service preference/take up – hirings across companies and service types
    - peak demand – hirings over peak- and off-peak periods (daily/monthly/annually)
- Market supply
    - available supply – number of licensed service providers (including taxi cap and availability)
    - potential market supply – for example, waiting lists for licences
    - distribution and allocation – across services and locations
    - impacts on participants – including market incentives and viability.

CONSUMER MEASURES

Price

Taxis – The regulated maximum for ACT taxi fares has not changed since prior to the reforms. No evidence has been presented of taxi providers offering discounting fares under the regulated maximum. With nominal fare prices unchanged, fares are declining in real terms over time.

ACT-NSW cross-border taxi fare changes commenced on 1 May 2017. Queanbeyan-based cross border taxis are now required to apply fares up to the ACT regulated maximum when commencing a hiring in the ACT, as is required of ACT-licensed taxis.

Table 1: Taxi fares

Description of matter in respect of which fare is payable	**Maximum fare ($)**
Radio Bookings	$0.00
Booking Fee for Canberra Silver Service Taxis	$13.80
Standard Taxi (single hiring)	
Flagfall	$5.00
Kilometre Rate	
- For a journey commencing between 6 am and 9 pm on a day other than a Saturday, Sunday or public holiday	$2.06
- For a journey commencing before 6 am or after 9 pm Monday to Friday and all day on a Saturday, Sunday or public holiday	$2.37
Other fees and charges are also regulated such as: multiple hirings, high occupancy; wait time; baby capsule, commissionaire surcharge.	

Source: Road Transport (Public Passenger Services) Maximum Fares for Taxi Services Determination 2015 (No 1)

Average taxi fares (per month) reported from April 2017 to June 2017 across all ACT taxi TBS varied from $22.78 to $23.41. This is 7 to 10% higher than average fares of $21.23 in 2014.[1] There was significant variation between taxi TBS, from 2.2(a)(xii) [redacted], to 2.2(a)(xii) [redacted]

- Actual fares represent a combination of price and distance travelled. For example, taxis undertaking hirings only around Civic may have a greater number of trips but at a lower average. Taxis operating from the Airport may cover greater distances and have higher average fares but may less hirings due to the greater time in transit.

[1] Australian Taxi Industry Association statistics.

Rideshare – Uber's fare structure changed on 9 June 2017 across Australia. Note that Uber customers may also be subject to 'surge' pricing in periods of higher demand.

Table 2: Canberra Uber fares

Fare structure	3 November 2015	16 November 2016	3 May 2017	3 August 2017
Booking fee				$0.55
Base fare	$2.35	$2.35	$2.35	$2.35
Per minute	$0.45	$0.45	$0.45	$0.45
Per kilometre	$1.35	$1.35	$1.35	$1.35
Minimum Fare	NA	$6.00	$6.00	$8.00

Source: Uber website, https://www.uber.com/en-AU/cities/canberra/

Average fares (per month) reported from January 2017 to May 2017 vary from $18.31 to $19.51. Note that this is subject to factors for both price and distance travelled.

goCatch has commenced rideshare services in the ACT, with pricing under Uber's pricing. The service fee for drivers is also lower, at 15%.

Table 3: Canberra goCatch fares

Fare structure	10 August 2017
Booking fee	-
Base fare	$1.90
Per minute	$0.33
Per kilometre	$0.95
Minimum Fare	$6.00

Source: http://www.gocatch.com/ride/?utm_source=GoCatch+Drivers+Australia&utm_campaign=7edf96f365-EMAIL_CAMPAIGN_2017_07_26&utm_medium=email&utm_term=0_020e7031ef-7edf96f365-64982561#lp-pom-text-670

Hire cars – no data available.

Service quality

Consumer views

Detail on consumer perceptions is subject to the conduct of consumer surveys. Initial surveys were undertaken during the 2015 review.

Further surveys are currently being undertaken as part of the evaluation of taxi reforms.

- As at 23 July 2017, the ACT Government had received 504 responses to three key questions posed on the *Your Say* website regarding the impact of the reforms
    - 87 per cent of respondents find it easier to get around Canberra using on-demand transport – such as taxis, rideshare and hire cars – since the reforms began
    - 89 per cent of respondents think rideshare and related reforms are a good thing for Canberra
    - 82 per cent of respondents are using on-demand transport, now that rideshare services like uberX are an option
- Industry, users and community stakeholders are being asked for their input regarding the impact of the reforms until 5 September 2017.

Waiting times

Rideshare

Uber publicly advises an average waiting time of less than 5 minutes in the ACT and that it has serviced passengers from 58 different countries in the ACT. TBS reporting data from January to May 2017 indicate average waiting times (per month) from 3.22 to 3.64 minutes.

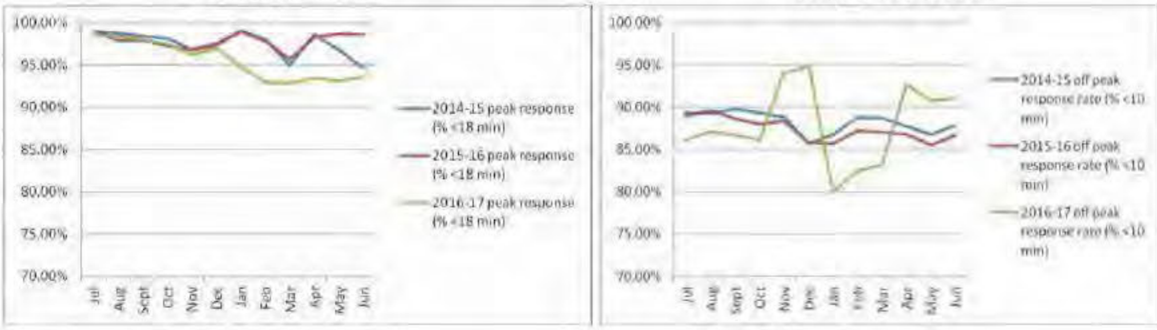
Taxis – standard

Taxi waiting times have been somewhat volatile in performance during the post-reform period. In the latest quarter, waiting times have levelled off during peak periods and drastically improved during off-peak periods.

This variability may be associated with factors such as new brands with developing fleets entering the market and attempt to satisfy bookings across the ACT or taxi drivers moving to rideshare services at different times of the day or week.

Graph 1: Standard taxi waiting time performance

Peak periods **Off-peak periods**

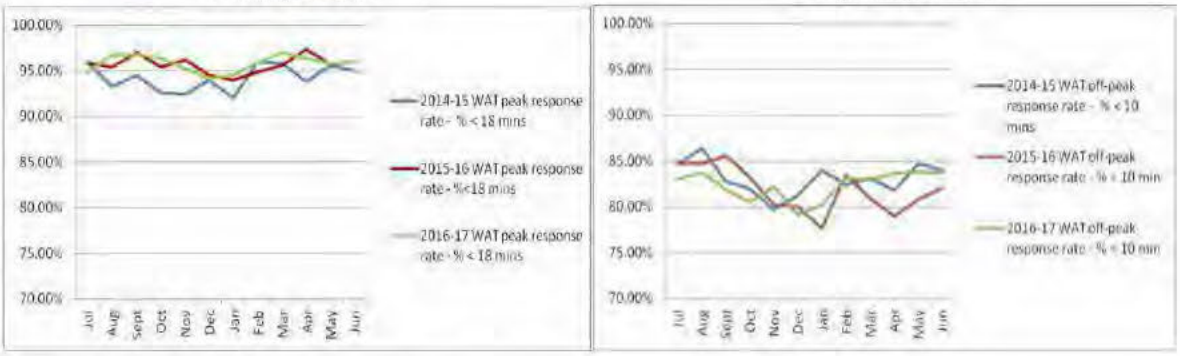


Taxis – Wheelchair accessible taxi

WATs waiting times have not been affected by the reforms, and are consistent with previous performance trends.

Graph 2: WAT waiting time performance

Peak periods **Off-peak periods**



Geographic

Data from Aerial shows waiting times improved across the ACT over the last quarter. Services to central Canberra still have a lower wait time than that of other areas, averaging less than 5 minutes. Woden and Weston Creek have average wait times in the mid to low 5-minutes range. Tuggeranong and Gungahlin and Belconnen are in the 6- to 7-minute range. Given the relative distances, a similar ordering could be expected from other providers but times may vary (for example, dependent on available fleet size).

Initial data from smaller operators 2.2(a)(xii) [redacted]) show longer wait times. This is expected due to the smaller fleets available to service the same area. 2.2(a)(xii) [redacted] has the longest wait times, at 10.73 to 15.25 minutes.

<u>Service ratings and complaints</u>

Taxi reporting shows varied outcomes across companies. 2.2(a)(xii) [redacted] reported complaints of between 2.2(a)(xii) [redacted] per cent of hirings per month (between April and June 2017). goCatch reported complaints of up to 1 per cent of hirings.

2.2(a)(ii) [redacted] reported customer satisfaction ratings of between 4.05 and 4.51 (out of five) over the quarter.

Uber reports average driver-partner ratings of [redacted] (out of five) from over the same period.

Consumer complaints directly to Access Canberra regarding on-demand transport services increased in 2016, after dipping in 2015. Predominantly, concerns have related to the operation of taxis. Complaints have covered matters ranging from overcharging, rudeness and no shows to more serious actions such dangerous driving and disability discrimination.

Table 4: Number of complaints received by Access Canberra

Year	Taxi	Hire car	Rideshare
2014	76	-	NA
2015	64	1	NA
2016	104	1	4
2017 (to 1 June)	35	-	10

Source: Access Canberra

However, complaints to Access Canberra may not be a reliable indicator of relative consumer quality due to differences in the ability of consumer to raise concerns. With Uber, the feedback and complaints mechanism is linked to the app, which the consumer is already using. Uber passengers also readily know how to contact this booking service. With taxis (in particular, rank and hail), a consumer may not immediate know who to contact.

AVAILABLE SERVICES

Overall, we continue to suggest that since the commencement of the ACT Government's reforms there has been increase in on-demand transport market services.

Rideshare services have increased. Standard taxi services have decreased (both booked and rank and hail); however, WAT booked services continue to grow.

Booked services

Rideshare

Uber advises (as at 29 April 2017):

- just under 1,000 active partner drivers; and
- 71,000 active riders (i.e., passengers who have activated the Uber app in the last 28 days).

As at the end March 2017, [redacted]

As an indicative estimate, assuming a similar increase to the Airport in general Uber patronage this would suggest in the order of [redacted]. Alternatively, if it is assumed that all active riders took at least one trip per month, then this would equate to [redacted] trips.

- These estimates would represent between 21.7 to 35 per cent of the 2014 total taxi trips in the ACT.[4]
- Against the booked standard taxi market for 2016-17 these rideshare estimate figures equate to between 55 per cent and 89 per cent.
- The number of rideshare trips, compared to a reduction in reported booked standard-taxi hirings of 206,199 since the reforms (November 2015 to June 2017), suggest growth in the market.

An earlier RiotACT poll (April 2017) indicated that 69 per cent of 203 surveyed respondents had used Uber in Canberra.[5]

Taxis

The 10 standard taxis from the March release were all on the road during the week of 1 May 2017. The five WATs from the June release are scheduled to all be on the road by October/November 2017.

The [redacted] continues to advise that the foremost impact on taxis from rideshare is in demand on Friday and Saturday nights[6], with taxi incomes during 'normal working hours' apparently not

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[2] We are awaiting data from the Airport on hire car numbers and revised numbers of terminal passengers.

[3] [redacted].

[4] ATIA data indicates total ACT taxi jobs of 2,431,950 in 2014.

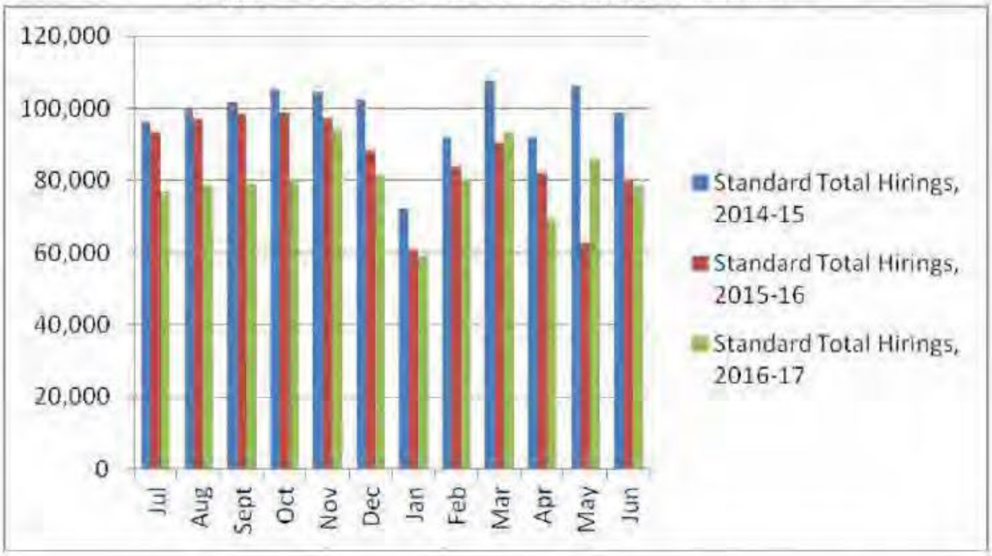
[5] See https://the-riotact.com/meet-australias-first-uber-driver-and-he-is-still-driving/201058. Poll votes as at 28 July 2017.

[6] This carries on early reports on Uber's operations in Canberra with 'more than a third of trips were requested between 6pm and 3am on Friday and Saturday nights' – see Canberra Times link.

affected by rideshare. 2.2(a)(xii) [redacted]), including booked and rank and hail.[7] Some taxi operators are describing a 20 reduction in income.

The data received by Access Canberra as part of Transport Booking Service (TBS) reporting suggests a reduction in booked services for standard taxis averaging in the order of 15 per cent per month over the first year of reforms (from November 2016 to October 2016 excluding May). In the second year (to March 2017), the average monthly decline has slowed to around 7 per cent.

Graph 3: Standard taxi booked hirings per month[8]



Over the first year of the reforms number of booked trips for standard taxis for the period November 2015 to October 2016,[9] compared to the prior year, declined by around 14,500 trips per month[10] and is equivalent to the prior workload for nearly 21.5 taxis[11]. In the second year, from November 2016 to today,[12] there has been a further decline however much reduced – averaging 3,299 trips per month.

Caution is required in interpretation of the potential impact of rideshare since its introduction, and the actual impact of reforms on industry participants.

- In the four months prior to rideshare commencing taxi bookings had declined by an average of approximately 3,900 trips (equivalent to services for 5.8 taxis).
- The impact on participants, such as operators and drivers, is reduced by reforms that reduced charges – either directly government or through competition between. See 'Operators' below.

[7] CTIA figures are based on Aerial data. This figure differs from advice the CTIA provided to the ATIA conference at the beginning of May 2017, which referred to a 10 per cent decrease.

[8] Note data from January 2017 now includes ACT Cabs and goCatch.

[9] Excludes May 2016 due to anomalous figures related to the Federal election.

[10] The figures represent an annualised amount excluding May 2016 due to what we consider is the impact of the 2016 Federal election, which is not consistent with more normalised periods of operation.

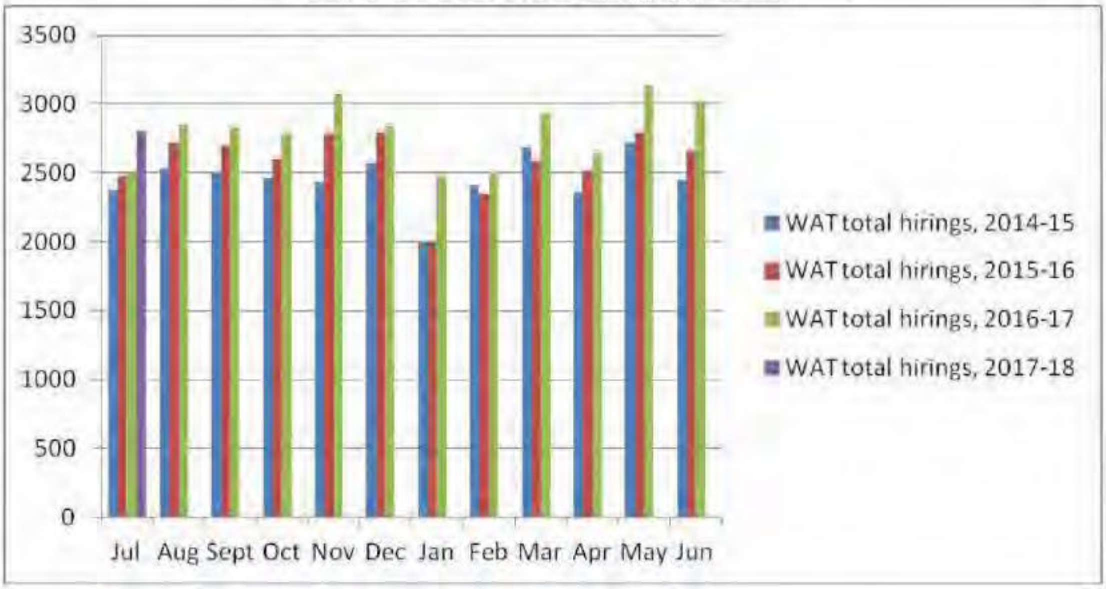
[11] The estimate use Australian Taxi Industry Association (ATIA) data which indicated a pre-reform average of 8,106 jobs per taxi in 2014.

[12] Excludes May 2017 due to anomalous figures for the prior year related to the 2016 Federal election.

WAT services

Demand for booked WAT services continues to increase. (Note that WAT services for people with disabilities are all subject to bookings through a centralised TBS.)

Graph 4: WAT booked hirings per month



A cap of 31 WAT licences now applies. WAT hirings have increased from around 11,000 in 2002-03 to 33,954 in 2016-17. In 2016-17, WAT bookings increased on the prior year by 13.8 per cent.

All WAT licences made available in June 2017 are expected to be on the road during October or November 2017 (a lag was expected due to time required to source vehicles). A further three WATs will be returned following earlier surrenders, two of which were previously advised to have been off the road for an extended period. A further operator surrendered a licence due to retirement.

Rank and hail

TBS data is available for the second quarter of 2017. In comparing the data with that from 2.2(a)(xii) for the same period over 2015 and 2016 reveals some variance from periods on a year-on-year basis. However, the average per month for the second quarter of 2017 (at nearly 94,000) is within the range of values for 2015 and 2016 (around 98,300 and 86,500, respectively).

In the ACT, rank and hail activity is understood to be the origin of approximately half of taxi fares. It has been increasing as a proportion of total trips, from 45 per cent in 2010 to 51 per cent in 2014 (according to ATIA statistics) [13] and to around 53 per cent in 2016 (based on CTIA supplied data). The Australian Taxi Industry Association (ATIA) has not updated data since the 2014 calendar year.

If you extrapolate 2.2(a)(xii) figure of a 13 per cent reduction trips per taxi per day (to 19.6) between 2015 and 2016, this equates to around 360,000 taxi trips per annum or the equivalent of around 45 taxis. This suggest that there has also been a drop in taxi rank and hail services between 2015

[13] Note that these figures were incorrectly inverted with the last market conditions briefing.

and 2016 of around 180,000 trips per annum (comparable to the abovementioned decline in booked services over the first year).

- However, we note that trips per day at these levels have been experienced previously. Based on ATIA data from 2013, when all 358 taxi licences were available, we understand that the average number of jobs per taxi per day averaged only 20.

Hire cars

No trip data are available. From September 2015 to July 2017, the number of licensed hire cars increased from 38 to 58. See 'Vehicle supply,' below.

December release – Holiday slow down

The ACT on-demand transport market has a clear annual slowdown period over the holiday months, from late December through to February. Graphs 3, and 5a and 5b evidence this with a clear drop in bookings and movements for taxis.

The TBS reporting data show regular declines in bookings for standard taxis of around 20,000 hirings or over. Even WAT booking volumes decline in the hundreds.

The 2.2(a)(xii) [redacted] data indicate a drop of around 2.2(a)(xii) [redacted] per month. This primarily relates to taxis as, while there was a slight drop in number over December 2016, the number of Uber movements picked up again in January 2017.

2.2(a)(xii) [redacted]

- Taxi services at the Airport are subject to significant variances in demand. Based on data supplied during peak periods (8am to 9am, Mon - Wed) taxi movements can vary from 2.2(a)(xii) [redacted]
  - The variability in demand means that for drivers/operators/TBS it is a difficult section of the market to service adequately through business planning.
  - This compares to taxis available for licence of 323 (not all of which are on the road) and the need to service the remainder of the ACT market.
- Take-up of uberX services at the Airport may be affected by exogenous factors such as corporate business clientele ability to use uberX (either through private corporate policies or the lack of tax receipt from uberX).
- We are not aware of any specific actions by the Airport to incentivise drivers to provide services. We have also raised with the Airport the potential to better engage and address passenger expectations (e.g. waiting time information as with buses).
  - While we understand that the Airport meets with the Canberra Taxi Industry Association (and its sole member, Aerial), we are not aware of similar approaches to other taxi providers.
- ACTCOSS and People with Disabilities ACT (PWD Shout) have also advised of a lack of consideration of services to vulnerable peoples waiting for taxis at the Airport.

2.2(a)(xii) [redacted]

ACTION bus services to the Airport commenced on 20 March 2017. As at the end of June, there had been 4,050 passenger movements at the Airport stop, with 2,346 boardings.

MARKET SUPPLY

All facets of on-demand transport market supply have grown since the ACT Government's reforms, predominantly in terms of rideshare, but also in relation to taxis (across drivers, operators and booking services) and hire cars.

Transport Booking Services

The number of transport booking services (TBS) licensed to serve taxi has increased since the commencement of the licence release strategy with the addition of Glide Taxis.

Table 5: Transport Booking Services (as at 1 August 2017)

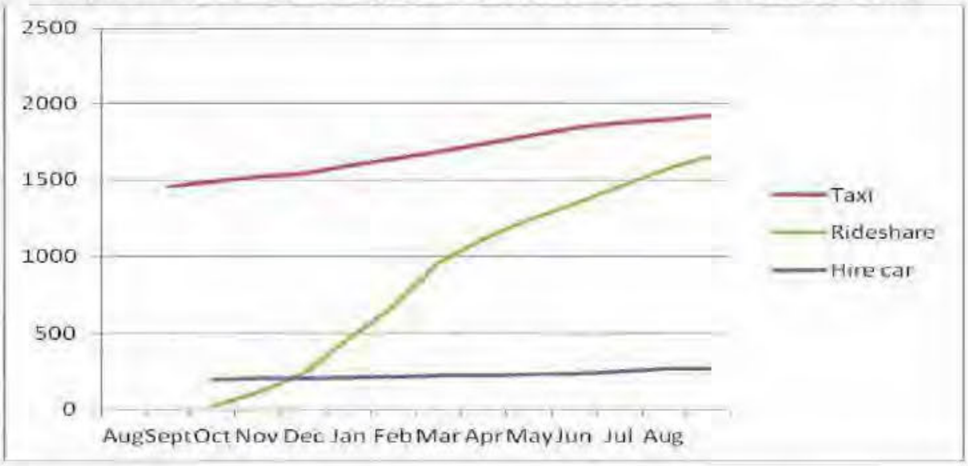
Type	Number	Company
Taxi	9	o Aerial Capital Group – t/a Silver Service and Canberra Elite (now operating under oneTBS) o goCatch o Cabxpress o ACTCabs o Glide Taxis o UZA Direct Pty Ltd o Doyen Technologies o EBA Solutions o Marshy's Chauffeured Services
Rideshare	6	o Uber – under uberX brand name o ACT Cabs o GoCatch o Doyengo Tech o Uza Direct P/L o Marshy's Chauffeured Services
Hire car	5	o Aerial Capital Group o EBA Solutions o ACTCabs o Doyengo Tech o Uza Direct P/L

* Note that not all licensed TBSs are currently active in the ACT market. goCatch has now commenced as an active rideshare provider. UZA Direct P/L (UZA), Doyen Technologies and EBA Solutions are not known to be offering transport services at this time. UZA is an associate of Aerial Capital Group.

Drivers

Access Canberra is recording increasing licence numbers for all types of drivers.

Graph 6: On-demand transport drivers – Licensed with Access Canberra



Increases in licensed drivers from 1 September 2016 to 1 August 2017 are as follows:

- taxis – 32.1 per cent; and
- hire cars – 36.5 per cent.

Meetings with operators as part of evaluation consultation suggest that these numbers do not reflect the availability of taxi drivers. Problems obtaining drivers for weekend and night time taxi shifts are advised, as drivers take the opportunity to provide rideshare services instead.

From 1 April 2017 to 1 August 2017, the number of licensed rideshare drivers increased by over 33 per cent.

Changes in number of rideshare drivers since before that time are not stated as we consider the data to be more reflective of the transition to formal licensing arrangements. The numbers may also include drivers who have obtained a combination of licences or who have dropped out of service (as part of the expected churn in rideshare drivers who try for a period but do not continue). The number of 'active drivers' advised by Uber has not been update (previously stated to be just under 1,000).

- UberEats, a food delivery platform, commenced operations in the ACT during July 2017. This service offers rideshare drivers access to an additional income stream but may also impact on the availability of drivers for public passenger services.

Operators

Rideshare operator numbers are increasing in line with expectations of licensing transition. Taxis are subject to limited variation. However, there has been significant growth in hire car operators on a proportional basis.

Table 6: On-demand transport operators – Licensed with Access Canberra

	1 Sept 2016	1 April 2017	1 August 2017	Difference
(as at 1st of month)				
Taxi	169		184	8.9%
Rideshare		958	1,274	33.0%
Hire car	24		34	41.7%

There is some churn in rideshare operators which is not evident in the point in time numbers above. Access Canberra has accredited 1,302 rideshare operators and license 1,437 rideshare vehicles (current vehicles are 1,323). Some rideshare operators are opting out by surrendering their licences and accreditation. The underlying reasons for surrender are not advised. There are administrative costs for Access Canberra in providing refunds.

Taxi operators leasing standard GOTL remain at a significant advantage to those leasing perpetual licences, in the order of $17,000 per annum. (This is equivalent to around 680 average taxi fares[14]. Over the 75 standard GOTL currently available, this represents around 51,000 taxi hirings per annum.)

CTP premiums for taxis were reduced with the reforms[15], by up to approximately 13 per cent or $1,160. However, the relative difference with rideshare premiums (nearly 14 times higher) is regarded as a significant competitive disadvantage.

We understand that there are differences in charges being levied on operators by different TBS since the start of the reforms.

2.2(a)(xii) [redacted]

Vehicle supply – Taxi equivalence

Available taxi vehicles now stand at 323, including 292 standard taxi and 31 WATs. This is an increase of 15 vehicles (or 4.9 per cent) with the March and June 2017 release.

Licensed hire car numbers have increased from 38 (September 2015) to 58 (July 2017). This is an increase of 20 vehicles (or 52.6 per cent).

With Uber drivers working part time and without trip data, it is difficult to compare the extent of rideshare services and supply provided into the market.

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[14] Estimated at $22.

[15] See http://www.cmd.act.gov.au/open_government/inform/act_government_media_releases/td/2016/taxi-and-hire-car-rates-fall-rideshare-premiums.

Based on Regulatory Reform calculations of theoretical maximum potential hours of supply[16], Uber may represent the equivalent of 60 to 119 taxis based on whether Uber drivers average 10 or 20 hours per week. As such, Uber may comprise between approximately 14 to 25 per cent of available on-demand market supply.

Table 7: Estimated on-demand market supply shares by available vehicles

	Pre-reform	Assumed average Uber driver hours	
		10 hours per week	20 hours per week
Taxi	89%	73.2%	64.2%
Hire car	11.0%	12.6%	11.0%
Rideshare	NA	14.2%	24.8%

TAXI LICENCES – GOTL AND PERPETUAL SURRENDERS, TRANSFERS AND LEASES

Government-owned taxi licences (GOTL)

Lease charges for GOTL remain at $5,000 per annum.

During 2017 (to 1 July), four GOTL were surrendered and have been returned to the market via the pre-approval waiting list.

As a 9 August 2017, the pre-approval waiting list stood at:

- standard taxis – 247 applicants (up from 242 as at 10 May); and
- WAT – 19 applicants (down from 31 as at 10 May, including the eight accepted licences referred to above).

Perpetual

During 2017 (to 1 April), there had been three transfers of perpetual taxi licences. Only one was a market based transfer with a price of $186,000. This compares to averages prices for transfers in:

- 2014 (pre-review/reform) – eight (8) plates at an average of $244,900;
- 2015 – 13 plates at an average of $244,200; and
- 2016 – three (3) plates at an average of $231,600.

During March 2017, 10 perpetual plate leases were subject to changes in operator. Prices advised to Access Canberra by operators remained in the order of $22,000. (In February 2017, leases prices were understood to average $22,872 per annum.)

2.2(a)(xii) [redacted]

Accordingly, we do not expect a substantive impact on plate holders from the next scheduled release.

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[16] In December 2015, the *Canberra Times* reported that Canberra Uber drivers were working 19 hours per week, however Uber prefers to refer to the proportion of drivers working 10 hours or less per week. For estimation purposes, taxis and hire cars are assumed to be available 24/7. Figures excludes cross border taxis.

[redacted]"
Sent:28/08/2017 1:21 AM
To:[redacted]
Subject: Taxi booking services in ACT [SEC=UNCLASSIFIED]

Hello [redacted],

As per our conversation last week please find below lists of Transport Booking Services, for the three modes of travel.

For clarity, we note that:

1) There are currently 323 taxi licences available for use on the road – of which 292 are standard and 31 are WAT

2) The TBSs actually operating with fleets, to-date, are:

   a. Aerial ([redacted]);

   b. CabXpress[redacted] and

   c. ACT Cabs ([redacted])

3) There is one independent taxi operating, which is standard.

4) Other TBSs listed, below, are either:

   a. Not yet operating but accredited

   b. Operating but provide booking services for rideshare (uberX, Doyengo)

   c. Providing third-party booking services only, and do not have a branded fleet (like goCatch)

Let us know if you have additional questions.

[redacted]

As at 1 July 2017

	Drivers	**Operators**	**TBS**
Taxi	1891	184	8 *Aerial –(t/a Silver Service and Canberra Elite now operating under 1 TBS) *goCatch *Cabxpress *ACTCabs *Glide *UZA Direct Pty Ltd

			*Doyengo Technologies *EBA Solutions
Rideshare	1568	1192	5 Uber ACT Cabs GoCatch Doyengo Tech Uza Direct P/L
Hire car	266	34	5 Aerial EBA Solutions ACTCabs Doyengo Tech Uza Direct P/L

From: [redacted]
To: [redacted]
Subject: FW: Taxi Data [DLM=Sensitive]
Date: Wednesday, 11 October 2017 12:12:00 PM
Attachments: Standard Waiting Time Performance - 201708.xlsx
WAT Waiting Time Performance - 201710.xlsx
Airport 201708.xlsx
On demand participants 201709.xlsx

[redacted]
[redacted] had mentioned that you had referred to passenger-hiring data sourced only from [redacted]
You might want to review the hiring data in these spreadsheets, too, from booking services, to see how they corroborate. This information above is provided to us as a requirement.
Also, he noticed your comments that surveys suggested an improbable, roughly 50% rideshare share of the market. For modelling, what range did you end up using?
Happy to discuss
[redacted]

From: [redacted]
Sent: Wednesday, 11 October 2017 12:02 PM
To: [redacted]
Subject: Taxi Data [DLM=Sensitive]

Its all under Taxi – Monitoring and Evaluation/1 - Data

[redacted] | Senior Manager
Regulatory Reform | Government Reform | Chief Minister, Treasury & Economic Development | **ACT Government**
Phone. +[redacted] | Email [redacted]
Level 4, Canberra Nara Centre | GPO Box 158 CANBERRA ACT 2601| www.act.gov.au

2.2(a)(xii)

2.2(a)(xii)

2.2(a)(xii)

2.2(a)(xii)

COMP AINTS RECE VED BY ACCESS CANBERRA

No e s me ompla n s a ea con i uance o la t mont s umbe s)

Yea	2016						2017
	Ju y	Augu t	Septembe	Oc obe	Novembe	Decembe	Janua y
Ta is	2 No Show WAT Ove cha ge	6 Sublea ing agg e sive d ving No show TSS i sue Ae ial By aws	11 a e ove cha g ng E pos su cha ge No show Agg ess ve d ve Dange ous d ving Sub easing	9 3 Ove cha ge – e unded 1 TSS issue – esolved w th ope a o 1 uspected mis onduct assau t – nvest gated N A 1 no how – e e ed to TBS 1 ompla nt against ta i nd Ae al – e e d om ai t ad ng nvest gated N A	7 1 – G oss Ove cha ge (unde nvest gat on) 2 – D ive s abi i y o d ve (N A) 2 - D ive cou e y (N A) 1 – D sabi i y D sc m na ion (N A) 1 – taxi d ve s not us ng mete and o e ing highe nego iated a es w th custome s at t mes o hi h demand (N A as unable to identi v d ive)	4 Agg e sive d ve - complete D ve know edge o Canbe a - comp ete Ove cha ge – unde nvest gat on SS ac eptance – d ve ssues – T ain ng ssues o d ive s ised w th BS s	6 Dan e ous d iv ng demanding cash a e TSS ssue cha ing o luggage ude d ve lost p ope v
R desha e	2 D ve censing gene al ompla nt that Ube s ki l ng tax indust v	0 NA	0 NA	0 0 - Consume e ated 7 - D ive s hav ng thei egi t at on documen s eje ted on up oad om Ube Ac ess Canbe a p ovided assi tance to hese d ive s Ube	2 2 – u ge p ic ng (N A) Othe – D ve s egi t at on and Ube admin st a ion ongo ng)	0 Othe – D ive s eg st ation and Ube adm nist at on ongo ng)	2 Demand ng ca h payment B each o sa e d iv ng hou s
Hi e ca	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA
Othe	1 Thi d-pa y Taxi TBS Rece pt – use o p vate eg ste ed ca	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA

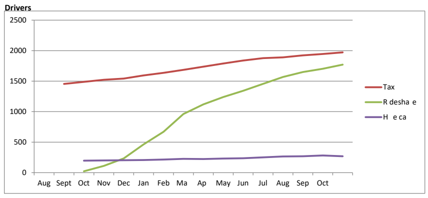
Yea	2017							
	eb ua y	Ma ch	Ap l	May	June	Ju y	August	Septembe
Ta is	12 ***D v ng Ab y*** 1 D ve s causing nu sance on p ivate p ope y 4 Dange ous D ving ***D ve onduct*** 3 Poo behaviou agg ess v e 3TX e using passenge s on he ank 1 ai u e o d splay PVDAC ***Su tab ty to ho d PV cence*** 1 nvest gation and ev ew ongo ng	9 2 pa king ank 2 d ve s epo ing othe d ve s 1 d ve s d iv ng ab l ty 1 WATS PX e using to t ans e om scoote 1 d ve conduct towa d vis on mpai ed pass nge s 1 el abi i y long wa t t me 1 ove cha ge	2 D ve s d ving abi i v	4 Va ious	4 Va ious – d iv ng abi ity d nge ous d iv ng and poo att tude o d ive	5 Va ious – d iv ng abi ity poo custome se vice	8 Va ous – a es lost p ope v oute taken	5 Va ous – a es lo t p ope v oute taken
R desha e	2 2 ai u e o di p ay R de ha e veh cle icence 2 Re ection o documents by UBER	6 1 Seat be ts chi d e t a nts 5 x not d splay ng icen e du ng hi ings	0 egist at on documen s ejec ed on up oad om Ube Access Canbe a p ov ded a sis ance o these d ive s Ube admin st a ion issue	0 eg st a ion documents e ected on up oad om Ube Access Canbe a p ovided ass stance to these d ive s Ube adm nist at on i sue	0	0 NA	0 NA	0 NA
Hi e ca	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA
Othe	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA	0 NA

	Govt	Ae al	
2014	76		521
2015			
2016	86		

ON DEMAND MARKET PARTIC PANTS

(As at 1st of month)

Yea		2016					2017									
Month		**Aug**	**Sept**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**
Drivers																
Tax		1455	1489	1523	1543	1594	1636	1685	1738	1790	1839	1877	1891	1922	1946	1972
R desha e			23	112	233	464	670	961	1119	1240	1343	1456	1568	1650	1704	1771
H e ca			197	201	204	208	216	226	224	232	236	251	266	269	282	269
Operators																
Tax		164	169	170	169	175	172	174	174	180	178	181	184	184	159	164
R desha e		-	7	35	83	190	283	570	822	958	1008	1090	1192	1274	1338	1391
H e ca		24	24	23	26	28	29	31	30	31	31	32	34	33	35	33
TBS																
Tax		4	4	4	4	4	4	4	5	5	8	8	8	9	9	9
R desha e		3	3	3	1	1	1	1	1	1	5	5	5	6	7	7
H e ca					1	1	1	1	1	1	5	5	5	5	5	5
Tax d ve % change f om Sep			2.34%	4.67%	6.05%	9.55%	12 44%	15.81%	19.45%	20 21%	23.51%	26 06%	29.97%	32.10%	33.75%	35.53%
R desha e d ve % change f om Sep				386.96%	913.04%	1917.39%	2813 04%	4078.26%	4765.22%	5291 30%	8.31%	17 42%	26.45%	33.06%	37.42%	42.82%
H eca d ve % change f om Sep				2.03%	3.55%	5.58%	9 64%	14.72%	13.71%	17 77%	19.80%	27 41%	35.03%	36.55%	43.15%	36.55%



Supply equivalence - against theoret cal maximum possible hours of service

Tax s No.	328	(cu ently ava lable w th Sep 2017 elease)
Max h s pe week (24/7)	168	
H e ca No.	53	(Access Canbe a 3 May 2017)
Max h s pe week (24/7)	168	
R desha e (act ve d ve)	1000	
Av hou s pe week 1	10	
Av hou s pe week 2	20	

Max hou s			*Tax equ valence*	
Tax	55104	55104		
H e ca	8904	8904		
R desha e 1	10000		59.5	
R desha e 2		20000		119.0
Total	74008	84008		

Theo et cal max ma ket cove age		
Tax	0 744568	0.655938
H e ca	0 120311	0.10599
R desha e 1	0 135121	
R desha e 2		0.238073
Total	1	1

Access Canberra Reporting - Taxi plate changes

2017

As at 1 February 2017

Perpetual Plate Transfers	Nil. Operation of taxi licence continues to occur. Current contract price for 2 years - $22,872 ($1906 per month)
Taxi Plate surrender	1 standard plate – has already been offered to top of pre-approval list.

As at 1 March 2017

Perpetual Plate Transfers	Nil.
Taxi Plate surrender	Nil.

As at 1 April 2017

Perpetual Plate Transfers	3 – 1 x sale $186,000, 1 x deceased estate, 1 x change to estate; 10 change of operator on perpetual plates were conducted this month. Price is still around $22,000pa as advised by operators.
Taxi Plate surrender	Nil.

As at 1 May 2017	
Perpetual Plate Transfers	1 - to family trust
Taxi Plate surrender	2.2(a)(ii) [redacted] surrendered and released – on road by 7 August 17

As at 1 June 2017	
Perpetual Plate Transfers	0
Taxi Plate surrender	2.2(a)(ii) [redacted] surrendered and released

As at 1 July 2017	
Perpetual Plate Transfers	5 operator transfers/0 sales

Taxi Plate surrender	2.2(a)(ii) [redacted] surrendered and released re released surrendered and released

As at 1 August 2017	
Perpetual Plate Transfers	3 operator transfers; 0 sales
Taxi Plate surrender	2.2(a)(ii) [redacted] surrendered and released

As at 1 September 2017	
Perpetual Plate Transfers	5 operator transfers; 0 sales
Taxi Plate surrender	0

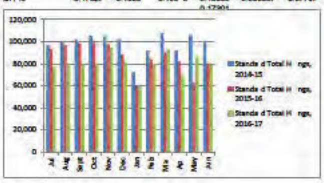
As at 1 October 2017	
Perpetual Plate Transfers	3 operator transfers; 0 sales
Taxi Plate surrender	0

axi Industry Waiting mes Performance Outputting Standard hirings 2016 17

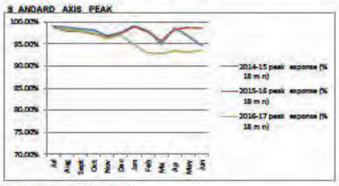
		Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	total
peak	under 10 mins	8,153	9,125	8, 09	7 952									33839
morning	10-18 mins	979	1,122	1,212	1 273	21,826	18,2	12,218	18 5 3	22,056	1 ,867	20 9 7	19, 30	150717
	18-30 mins	108	157	169	233	22,511	18,658	12,867	19 7 9	23,503	15,885	22 28	20,705	15 893
	30-60 mins	8	27	59	50									1
	over 60 mins	1	2	1	1									5
peak	under 10 mins	7,306	8,180	7,936	7,199									30623
a ternoon	10-18 mins	931	955	1,067	955									3908
	18-30 mins	130	111	112	129									82
	30-60 mins	22	1	18	20									7
	over 60 mins	0	2	1	0									3
2015-16 st	% < 18 mins	98 8%	98 1%	98.00%	97.57%	98.19%	97.0 %	9 .78%	92.97%	92.82%	93 %	93.13%	93.61%	
2015-16 st	% < 30 mins	99.82%	99.77%	99.58%	99.60%	99.21%	99.52%	99.61%	99.01%	98.91%	99.83%	99.71%	99.75%	
								122 1	109 8	23781				
Per ormance Against Measure	required 85%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%				
	required 95%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%				
o f-peak	under 10 mins	51,05	51,1 8	52,032	53, 82	67,3 8	61, 83	35,7 1	6,123	55, 5	9,882	57 792	52,7 8	63 065
	10-20 mins	7,575	6,979	7,305	7 83	70,926	6 ,3 5	6,253	53 5 3	62,526	53,255	63 35	57,565	501 52
	20-30 mins	92	8	633	557									2030
	30-60 mins	150	128	17	188									6 0
	over 60 mins	6		7	16									33
2015-16 st	% < 10 mins	86.13%	87.12%	86.65%	86.15%	9 .09%	9 .8 %	79.92%	82.53%	83.2 %	92.71%	90.73%	91.01%	55.71%
2015-16 st	% < 20 mins	98.91%	99.01%	98.81%	98.77%	99.03%	99.25%	98.38%	98.29%	98.22%	99. 1%	99. 6%	99.31%	99.78%
e Against	required 85%	100.00%	100.00%	100.00%	100.00%	100.00%	[illegible]	[illegible]	97.10%	97.93%	100.00%	100.00%	100.00%	
	required 95%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	
								719	55885	66621				0.09%
								701	5 75	63659				YTD PAM
Average Monthly PAM		100.00%	100.00%	100.00%	100.00%									
Total Hirings		76917	78 02	79055	79889	9 315	81568	59222	79908	93328	69 80	88190	78710	956982
	2015-16	93376	97157	9838	987	97323	88 66	60699	839 6	90229	82050	62527	80205	1033108
	Di ference	-16 59	-18755	-19329	-18855	-3008	-6898	-1 77	- 0 0	3097	-12570	25663	-1 95	76126
	Di f %	-0.17627	-0.1930	-0.196 8	-0.19095	-0.030907	-0.07797	-0.02 33319	-0.0 813	0.03 322	-0.1532	0.378	-0.0186	7 37%

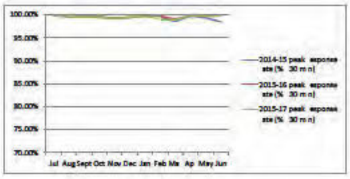
-0.17301

66835.5
59658
7177.50 1.56%

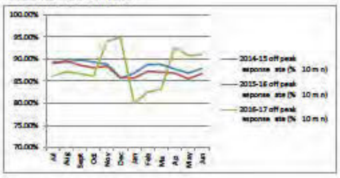


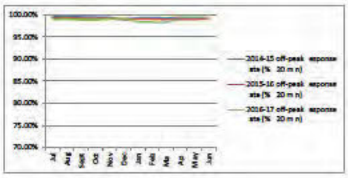
S ANDARD AXIS PEAK





S ANDARD AXIS OFF PEAK





Effective taxi supply change (booked hir ngs)

Di ference n jobs - First year	Taxi jobs
(Nov 15 - Oct 16 excluding May 16)	
Average per month	-1 99
Annualised	-173992
No of tax s	-21.4646
Di ference n jobs - Second year (to date)	Taxi jobs
(Nov 16 - Jun 17 excluding May 17)	
Average per month	-3298.93
Annualised	-39587 2
No of tax s	-4.88369
Pr or monthly trend	
(Jun 15 - Oct 15)	
Annualised	- 73 3
No of tax s	-5.84049
Av taxi jobs per year (201)	

Reported diff Nov 15 to un 2017
-208199

C IA/Aerial data*	Std	A l hirings	Cars	Std/per car	All hirings
2015	2201 17	23 0 08	28	8068.3807	82 0.873
2016	193 08	197 82	277	6982.2527	7128.09
Di f	-357333	-365926		-1086.117	-1112.78
Di f %	-0.1559	-0.15635		-0.13 61 2	-0.13503
					-3 2736
No. of tax s	-44.0625	-45.1420			- 2.2818

* No e not fu ly al gned with reported TBS data.

Difference since 2010 11

2010-11	1318553
2016-17	956982
No. hirings	-361571
%	-27. 2%
Taxi equiv	96.17019

Performance Standards

Standard taxis
Peak Periods (8.00am – 10.00am & 3.00pm – 5.00pm Monday - Friday)
(a) 85% of all hirings have a maximum waiting time of no more than 18 minutes
(b) 95% of all hirings have a maximum wa ting time of no more than 30 minutes
At all other times
(c) 85% of all hirings have a maximum waiting time of no more than 10 minutes
(d) 95% of all hirings have a maximum wa ting time of no more than 20 minutes and

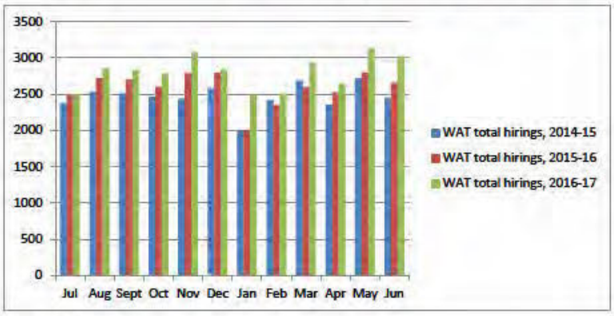
Legend

Rideshare is introduced
Decline in SNT taxi fleet *

* **2015** - 43 standard taxis 15 WAT taxis used in SNT program
2016 - 15 standard taxis 7 WAT taxis used in SNT program

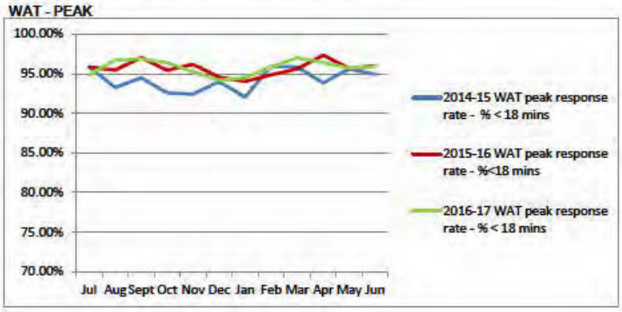
Taxi Industry Waiting Times Performance Outputting - Wheelchair Accessible Taxis (WATs) - 2016-17

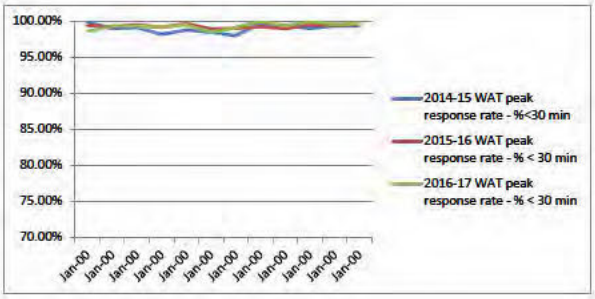
		Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	total
peak	under 10 mins	119	190	182	181	225	139	74	130	133	71	143	149	1736
morning	10-18 mins	15	24	19	15	24	12	8	5	10	9	11	13	165
	18-30 mins	6	8	4	4	9	6	3	6	2	0	9	5	62
	30-60 mins	4	0	0	0	1	3	1	0	0	0	2	0	11
	over 60 mins	0	2	1	0	0	0	0	0	0	0	1	0	4
peak	under 10 mins	358	501	451	395	451	362	330	340	429	324	438	421	4800
a/noon	10-18 mins	43	52	53	53	61	51	34	56	41	54	80	50	628
	18-30 mins	15	13	14	15	25	20	19	17	13	17	18	20	206
	30-60 mins	4	3	4	4	3	6	3	0	4	0	0	2	33
	over 60 mins	0	0	0	1	0	0	0	0	0	0	0	0	1
2015-16 W	% < 18 mins	94.86%	96.72%	96.84%	96.41%	95.24%	94.16%	94.49%	95.85%	96.99%	96.42%	95.73%	95.91%	95.85%
2015-16 W	% < 30 mins	98.58%	99.37%	99.31%	99.25%	99.50%	98.50%	99.15%	100.00%	99.37%	100.00%	99.57%	99.70%	99.36%
Performance Against Measure	required 85%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
	required 95%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
off-peak	under 10 mins	1,602	1,723	1,719	1,700	1,874	1,774	1,609	1,626	1,912	1816	2036	1973	21364
	10-20 mins	231	258	263	290	293	333	280	242	286	262	309	284	3331
	20-30 mins	62	51	75	77	81	89	79	58	82	69	63	62	848
	30-60 mins	33	25	40	42	24	41	35	28	25	25	19	35	372
	over 60 mins	2	2	3	5	7	4	3	3	0	0	2	2	33
2015-16 W	% < 10 mins	83.01%	83.68%	81.86%	80.42%	82.23%	79.16%	80.21%	83.09%	82.95%	83.61%	83.82%	83.74%	82.33%
2015-16 W	% < 20 mins	94.97%	96.21%	94.38%	94.13%	95.09%	94.02%	94.17%	95.45%	95.36%	95.67%	96.54%	95.80%	95.17%
Performance Against Measure	required 85%	97.65%	98.45%	96.30%	94.61%	96.74%	93.13%	94.36%	97.75%	97.59%	98.36%	98.61%	98.52%	96.86%
	required 95%	99.97%	100.00%	99.35%	99.09%	100.00%	98.97%	99.12%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Average Monthly PAM		99.41%	99.61%	98.91%	98.42%	99.19%	98.02%	98.37%	99.44%	99.40%	99.59%	99.65%	99.63%	99 22%
														*YTD PAM
Total Hirings		2494	2852	2828	2782	3078	2840	2478	2511	2937	2647	3131	3016	33594
	2015-16	2480	2721	2700	2601	2786	2794	2004	2350	2594	2520	2795	2655	29516
	Diff	14	131	128	181	292	46	474	161	343	127	336	361	4078
	Diff %	0.6%	4.8%	4.7%	7.0%	10.5%	1.6%	23.7%	6.9%	13.2%	5.0%	12.0%	13.6%	13.8%



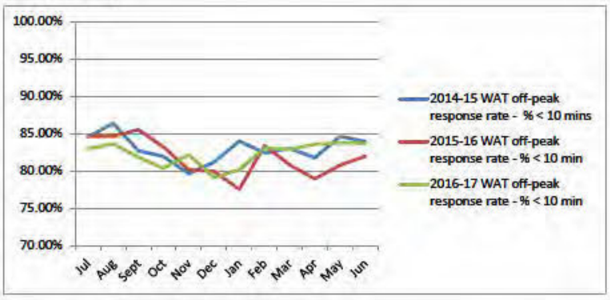
WAT 2016 bookings 31792

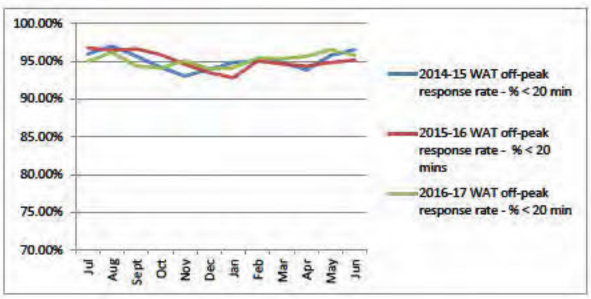
WAT - PEAK





WAT - OFF PEAK





[redacted]
Sent:11/10/2017 1:35 AM
To:'[redacted]
Subject:RE: Taxi Data [DLM=Sensitive]

Thanks, [redacted]

From: [redacted]
Sent: Wednesday, 11 October 2017 12:21 PM
To: [redacted] [redacted]>
Subject: RE: Taxi Data [DLM=Sensitive]

Thanks [redacted] Will check it out. The modelling used a low of 20% and a high of 40%.

[redacted]

[redacted]
Director

[redacted]
Suite 1 Level 16
1 York St
Sydney NSW 2000

CIE *www.TheCIE.com.au*

From: [redacted]]
Sent: Wednesday, 11 October 2017 12:13 PM
To: [redacted]
Subject: FW: Taxi Data [DLM=Sensitive]

[redacted]

[redacted] had mentioned that you had referred to passenger-hiring data sourced only from Aerial. You might want to review the hiring data in these spreadsheets, too, from booking services, to see how they corroborate. This information above is provided to us as a requirement.

Also, he noticed your comments that surveys suggested an improbable, roughly 50% rideshare share of the market. For modelling, what range did you end up using?

Happy to discuss

[redacted]

From: [redacted]
Sent: Wednesday, 11 October 2017 12:02 PM
To: [redacted]
Subject: Taxi Data [DLM=Sensitive]

Its all under Taxi – Monitoring and Evaluation/1 - Data

[redacted] | Senior Manager
Regulatory Reform | Government Reform | Chief Minister, Treasury & Economic Development | **ACT Government**
Phone. +[redacted] | Email [redacted]
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