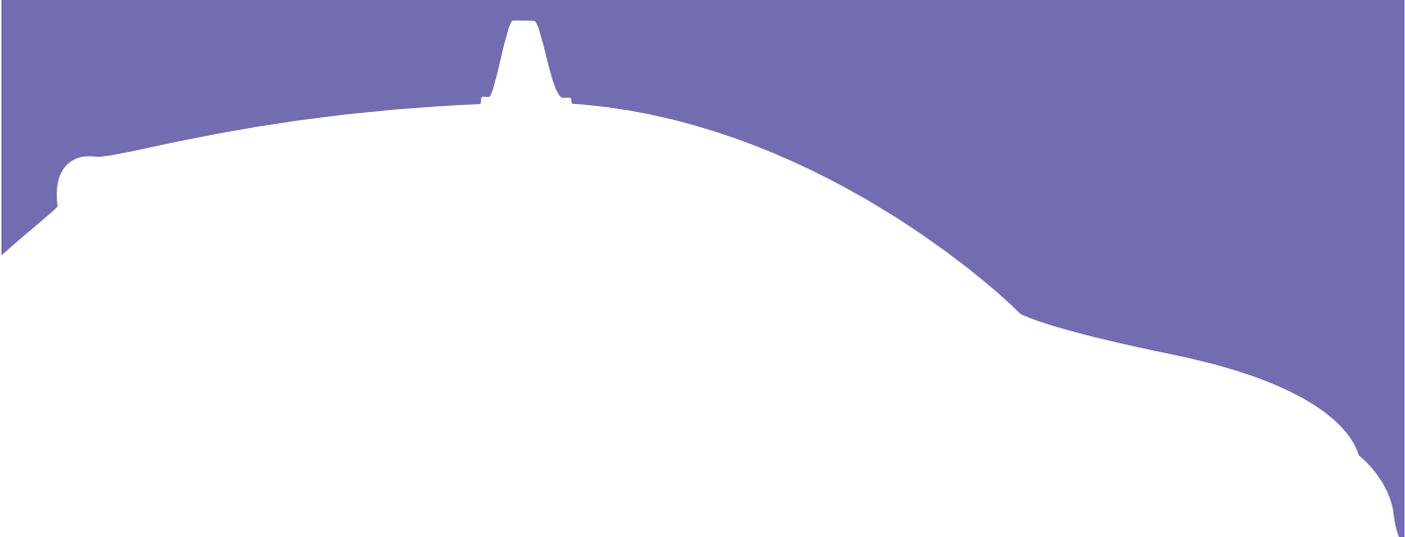


South Australian Taxi and Chauffeur Vehicle Industry Review



February 2016



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1. Introduction

The Taxi and Chauffeur vehicle industry plays a vitally important role in the economy as well in the overall public transport network in South Australia. For thousands of visitors and tourists the drivers of taxi and chauffeured vehicles often represent their first experience of our state – about 60% of visitors to Adelaide arrive via Adelaide Airport and take a taxi. For people who live in Adelaide they provide an essential form of everyday transport.

Any reforms from this review aim to put the needs of customers first and balance the interests of drivers, operators and industry.

It is noted that the taxi and chauffeured vehicle industry are an important source of mobility for many aged, disabled, youth and vulnerable sectors of the community who rely upon this form of transportation to access important and essential services. Many of these journeys are supported by government subsidies.

If the industry is to grow and thrive it must continuously work at improving services to deliver an enhanced customer experience. There is increasing demand and expectation to have safe, clean taxis and chauffeured vehicles, well presented, courteous, highly trained and knowledgeable drivers. This Taxi and Chauffeur Vehicle Industry Review aims to provide the direction for achieving these outcomes.

Changes in technology and consumer demands present a significant opportunity to review the taxi and chauffeur vehicle industry so that lasting improvements can be implemented.

The taxi industry can be a national leader of this new service culture by embracing the opportunity to respond to the challenges presented in the State Strategic Priorities, in particular:

- growth through innovation;
- a destination of choice for travellers;
- Adelaide: the heart of the vibrant State;
- the best place to do business;
- promoting South Australia's international connections and engagement.

The Review has identified the following key objectives to rejuvenate this industry:

- set, maintain and monitor high levels of customer service;
- implement new technologies which enable more efficient and effective customer experience;
- lift standards of training with particular emphasis on vehicle and driver presentation, English language; skills, customer service, cultural awareness and provision of relevant, timely and valued information to visitors and customers;
- reposition taxis as part of a unique high quality South Australia passenger experience;
- greater co-ordination and integration into the passenger transport service network.

To achieve sustainability and economic viability into the future the industry must deliver the highest standards of customer service by ensuring stringent safety requirements, fostering innovation and allowing fair competition

At the same time the market needs to remain open for both existing operators and others who wish to join the industry. It is through greater efficiencies and responsiveness to the needs of passengers that the current market will grow.

Throughout Australia, including South Australia, the taxi and hire car industry is subject to regulation. Taxis and chauffeured vehicles are regulated by the State Government for both metropolitan and regional transport services and in some instances in regional areas they are regulated by local government. Currently the sector is represented by various services, such as hire cars or chauffeured vehicles, taxis and wheelchair accessible taxis, which operate under different conditions and regulations.

In recent years, new and innovative technologies and business models have emerged across the world and are now operating in some cities in Australia. As a result, these emerging technologies and interfaces provide new opportunities and challenge existing members of the taxi and chauffeur vehicle industry to apply new practices. These platforms can provide substantial growth opportunities for the on-demand transport market.

Application based booking systems have been readily taken up by consumers where they have been introduced, with companies that provide booking platforms gaining market share.

These global market trends will have significant implications for all of the stakeholders in the taxi and chauffeur vehicle industry – from consumers, to drivers, owners, operators and taxi networks.

In particular, taxi networks and licence plate holders with significant investments will face increasing competitive pressures.

New digital technologies and emerging alternative business models are presenting exciting opportunities for the on-demand public transport industry in Australia and around the world, providing greater choice for the consumer. These include smartphone applications to book, track and pay for taxis and chauffeured vehicles. They offer the ability to expand the range of, and access to, reliable and convenient transport options for consumers, and promote competition in value and service.

More innovative and differentiated public transport solutions fit key State priorities. They can support economic growth in South Australia, provide a competitive environment that serves consumers well, and contribute to making South Australia a leading digital smart city.

Innovation has the potential to promote change for the better. There needs to be appropriate regulatory settings to support the broader public good and opening of the market to ensure competition flourishes.

2. Executive Overview

- Taxis undertake approximately 8 million trips per annum and in 2014/15 the South Australian taxi industry made a direct employment contribution of 4,200 FTE jobs¹, indirect employment contribution of 194 FTE jobs² and generated \$242 million³ in revenue.
- For thousands of visitors and tourists the drivers of taxis and chauffeured vehicles often represent their first experience of our state. For people who live in Adelaide they provide an essential form of everyday transport.
- The industry has substantial growth potential by comparison with other Australian states if it embraces the State strategic priorities.
- If the industry is to achieve growth, the market needs to be opened up. The industry needs to embrace new technologies and become less reliant on regulation. Most importantly, the SA industry need to improve its culture of innovation and competition with a commitment to high quality customer service.
- Driver incomes are very low and working hours are long. Consequently, there is a high turnover of drivers, who in the main receive little training and supervision. This results in poor customer experience and inefficiency in the industry.
- The current training program for both taxi and chauffeured vehicles does not provide for any consistent or ongoing development of drivers and it appears there is a lack of focus on customer service culture, cultural awareness and tourism related modules. The Panel recommends a thorough review of the training provision for both taxis and chauffeur drivers and operators.
- It is for these reasons the Panel recommends the introduction of appropriate regulation, to be inclusive of the new technology based entrants in the South Australian market. All providers need to be accredited and the service provider's outcome focussed. Further to this the panel recommends a levy on all journeys undertaken by metropolitan taxis and on demand vehicles to ensure that all those benefiting from reform help to bear any costs and support implementation of the reforms. A levy of \$1 per journey is expected to provide over \$80 million over the next decade.
- The Panel is in favour of reduced regulation of this industry, a reduction in annual fees where appropriate and new taxi licences to be limited to owners/drivers so that over a longer period of time the industry becomes small business driven with career pathways and long-time participants.
- The Panel recommends the introduction of a Green Taxi Initiative, which allows the taxi industry to contribute to environmentally sustainable practices and provides passengers with a choice of a more environmentally friendly vehicle. This initiative will help position taxis as an integral part of developing Adelaide as a Global Smart City.
- The establishment of a skill based Advisory Committee is recommended by the Panel, which is expertise based and advisory in nature to oversee the orderly growth and development of the industry and provide sound objective advice to government.
- New digital technologies and emerging alternative business models are presenting exciting opportunities for the on-demand public transport industry in Australia and around the world, providing greater choice and responsiveness for the consumer. While innovation has the potential to promote change for the better, there needs to be appropriate regulatory settings to support the broader public good and opening of the market to ensure competition flourishes. There is an opportunity for national harmonisation for regulations associated with on demand travel.

¹ Table 5: South Australian taxi industry, direct employment contribution – Cadence Economics - SA Taxi Economic and Social Contribution

² Table 7: indirect employment contribution – Cadence Economics – SA Taxi Economic and Social Contribution

³ Table 2: South Australian taxi sector – revenue by region – Cadence Economics – SA Taxi Economic and Social Contribution

3. Review Recommendations

The Review recommendations have been formulated through extensive consultation and information provided in verbal and written submissions to the Panel. The pertinent matters highlighted throughout consultation are outlined in the appendices of the report.

The overarching objectives of the Review are to ensure the best possible outcomes for the consumer, industry and the broader community as follows:

3.1 Terms of Reference – Service Standards and Opportunities for Improvement

1. Allow new entrants and technologies into the market.
2. Review the licence fees for all providers and make more equitable.
3. Introduce a user friendly complaints mechanism independent of industry across the entire on demand passenger transport network.
4. Encourage national harmonisation. Given recent Australian history of transport reform there is now an opportunity for a national approach to on demand travel that has a consistent national regulatory framework.

3.2 Terms of Reference - Safety and Security for Passengers and Drivers

1. Implement universal taxi driver certification and identifier which is consistent throughout the industry to facilitate the elimination of rogue drivers and practices.
2. Implement legal accountability, similar to provisions in heavy vehicle industry regulations, to all parties involved in the on demand passenger transport industry for their actions or inactions. This will encourage good behaviour and penalise any person or corporation who gains an unfair commercial advantage by breaching passenger transport legislation, road laws, or risks road safety.
3. Activate audio recording capability as part of the existing security cameras in taxis. This will support the investigation of incidents and complaints.
4. Only taxis permitted rank and hail work.
5. In order to provide an appropriate level of policing of the industry, consideration be given to the greater utilisation of inspectorial officers across government agencies.
6. Driver accreditation photo identification must be displayed across all vehicle categories at all times and also to be available on any fixed and wireless booking devices
7. Each chauffeur vehicle is to display an approved identifier as a basic measure of security
8. Review the effectiveness of the deterrent value of the current range of legislative penalties for non-compliance, particularly in line with recommendation 2.1.3 (legal accountability/chain of responsibility) and consider the introduction of on the spot fines.
9. Chauffeured vehicles centralised booking offices be required to have a physical address and contact person resident in South Australia who can provide evidence to police and investigators.

10. All drivers who consistently receive bad ratings from passengers and/or who transfer within the industry with immunity must be reported to the Regulator.
11. Transfer of the functions of the Passenger Transport Standards Committee to the South Australia Administrative Appeals Tribunal, in all matters except issues relating to health and fit and proper person criteria where specialist panels are to be retained.

3.3 Terms of Reference - Driver Remuneration and Working Conditions

1. The Minister to consider issuing on a fixed term basis or leasing a fixed number of low cost new owner/driver plates/licences, which are to be driven by the owner and not further leased. This is a new category of taxi plate encourage small business participation, career based drivers and long term involvement in the industry.
2. The Minister to review annual on demand metropolitan passenger transport fees on the basis of a more equitable impost across both taxis and chauffeured vehicles following substantial de-regulation of the industry.
3. Allow multiple booking services for taxis for greater customer choice and industry efficiency and responsiveness.
4. Review the CTP insurance arrangements for on demand passenger transport providers to determine the reason for discrepancy in premiums.

3.4 Terms of Reference - Fares and Surcharges

1. All taxi fares to remain as metered fares.
2. ESCOSA to undertake an annual independent review of taxi fares.
3. Decisions with respect to numbers and fees of premium taxi operations to be determined by owners and operators.
4. Reduction of credit card fare payment transaction fees attributed to the consumer to be no greater than 5% of the total fare.
5. Prohibit on demand work under the TV category and remove the \$20 minimum fare requirement.
6. Passenger fares of chauffeured vehicles, including new entrants, to be transparent and an accurate estimate provided to the customer prior to commencement of the journey.

3.5 Terms of Reference - Training and Accreditation Requirements

1. Establish new and improved training programs to provide consistent and ongoing development of drivers. Taking into account national best practice in industry training and in consultation with interest groups, establish a roots and branches review of the training provision for this industry. The training of drivers and operators must address vehicle and driver presentation, driving and safety skills, cultural awareness, use of technology, access to up to date state tourism and event information, English language skills, a culture of customer service and knowledge of metropolitan Adelaide and regions.
2. Ensure all training providers are appropriately qualified, independent of vested interests and meet relevant competitive tendering requirements.
3. All public transport drivers, including new entrants, must have the same independent checking process (determined by government) for criminal history working with children, medical health and vehicle roadworthiness and amenity.

4. Amend passenger transport legislation to include disqualifying offences.

3.6 Terms of Reference - Vehicle Standards and Requirements

1. Establish contemporary vehicle standards for all current and new industry entrants. Minister to consider:
 - o strict adherence to roadworthiness standards;
 - o amenity of all passenger transport vehicles;
 - o compliance with passenger and driver security standards;
 - o all vehicles must meet established standards of passenger and luggage carrying capacity;
 - o reducing the taxi vehicle age limit from 6.5yrs to 5 years for all new taxi vehicles.
2. The industry to commit to environmentally sustainable practices and in particular the goal of carbon neutrality.
3. Position taxis as an integral part of developing Adelaide as a Global Smart City.
4. Establish a "Green Taxi" initiative for eligible taxis in existing fleet and new entrants to be Green Coded, which may include:
 - o vehicle type (electric, plug in hybrid, petrol hybrid, diesel, petrol);
 - o new technology provisions which enable the measurement of motor vehicle and driver performance;
 - o on/off engine technology while stationary and other emerging technologies;
 - o re-branding to identify "Green Taxis".
5. The Minister and industry representatives to engage in discussions with motor vehicle manufacturers to develop environmentally sustainable vehicles for use by the taxi and chauffeured vehicle industry.
6. Remove the current restrictive policies to increase the range of vehicles to be eligible for use as chauffeured vehicles in the Small Passenger Vehicle Metropolitan Vehicle (MV) and Traditional Vehicle (TV) category.
7. Establish a clear distinction between MV and TV categories to ensure that all pre-booked on demand work is MV accredited.
8. Allow contact details to be discreetly displayed on chauffeur vehicles.
9. Exempt chauffeur vehicles from displaying a not for hire sign.

3.7 Terms of Reference - Centralised Booking Services

1. Establish criteria to ensure passenger, driver and public safety, vehicle roadworthiness standards and compliance to service standards required of the industry including such matters as lost property retrieval.
2. During peak hour times and in order to provide a more responsive service to consumers, establish processes and procedures to achieve greater co-operation between Radio Rooms and Booking Services.
3. Country taxis be allowed to co-service outer metropolitan areas – such as Adelaide Hills, Willunga, Gawler region.
4. Consideration is given to alignment of the metropolitan boundaries under the *Passenger Transport Act 1994* and those defined by the Motor Accident Commission.

5. Introduce a ‘no destination’ policy where the CBS is not told the destination of the passenger to encourage all potential trips to be taken up and reduce the amount of times passengers are left waiting for a taxi that does not arrive as it is perceived to be a short fare.

3.8 Terms of Reference - Synergies with other forms of Public Transport

1. Country taxis be allowed to co-service outer metropolitan areas – such as Adelaide Hills, Willunga, Gawler region.
2. Consideration is given to alignment of the metropolitan boundaries under the *Passenger Transport Act 1994* and those defined by the Motor Accident Commission.
3. Taxi and Other private transport services operating in regional areas to be considered as a critical part of the review shortly to be commenced in the target regions. These forms of transport will need to form part of the broader solution to address transport disadvantage in regional areas, including representation on any future Regional Access Committees and participation in local trials and pilot programs.
4. Taxi and passenger transport services to be regularly consulted and participate actively in planning of future regular transport services, i.e. local neighbourhood or late night services as well as planning for major events. Review the accreditation of courtesy vehicles.

3.9 Terms of Reference - Innovation New Technologies and Competition

1. Establish a Taxi and Chauffeured Vehicle Advisory Committee comprising an independent Chair and membership with expertise in tourism and events, retail, technology, business, transport and representation from the Taxi and Chauffeured Vehicle Industry with responsibilities, which may include:
 - Development and strategic direction of the industry with an emphasis on growth.
 - Monitoring national and global trends.
 - Monitor the needs of regional South Australian communities.
 - The development of an environmentally sustainable industry that complements infrastructure and economic development.
 - Advise on standards in relation to complaint mechanisms, customer service and driver quality.
 - Advise on policy development.
 - Best practice monitoring.
 - Oversee the establishment of a professional training curriculum and registered training organisations.
 - Provide regular periodic data on performance of the industry.
2. The Taxi and Chauffeured Vehicle Advisory Committee to be consulted in the planning stages of all major development projects where there is likely to be an impact on passenger transport.
3. Implement an Industry Development Levy of \$1 per journey for all taxi and chauffeured metropolitan vehicles, which will be used to improve the sector as a whole with all revenue to be deposited into a taxi and chauffeur vehicle development fund and to be applied for the orderly development of the industry.

3.10 Terms of Reference - Taxis and Chauffeured Vehicles in the Tourism Visitor Experience

1. All taxis, chauffeured vehicles and new entrants are required to provide passengers with up to date tourism and event information.

2. All taxis, chauffeured vehicles and new entrants to have a mobile, readable matrix type based optical barcode (e.g. QR code) that contains live “what’s on in Adelaide” for events and information on South Australia.

3.11 Terms of Reference - Adequacy and Cost of Accessible Taxis

1. The Minister to investigate:
Implementation of a flat charge Lifting Fee while loading a passenger and redefine and clarify the definition of the commencement of a journey. The Lifting Fee should be in addition to a revised on-time bonus.
2. Selection, Training and Accreditation of drivers to take into account the specific requirements of this sector of the community.
3. Introduction of significant penalties and deterrents for drivers, operators and booking services that do not meet service level requirements.
4. Introduction of user friendly complaints mechanism independent of industry.
5. Revision of tender documentation to ensure that there is appropriate sanctions to achieve strict adherence to response times in line with the *Commonwealth Disability Discrimination Act 1992*.
6. Revision of tender documentation to ensure the application of new technologies and processes to minimise non-compliance and fraud.

4. Review process

The Minister for Transport and Infrastructure appointed the independent Taxi and Chauffeur Vehicle Industry Review Panel to consult with industry and consumers and provide final recommendations to government.

The Review Panel had a broad scope to examine the sector and its performance against the following terms of reference (Appendix):

- service standards and opportunities for improvement;
- safety and security for passengers and drivers;
- driver remuneration and working conditions;
- fares and surcharges;
- training and accreditation requirements;
- vehicle standards and requirements;
- centralised booking services;
- synergies with other forms of public transport;
- innovation, new technologies and competition;
- taxi and hire car roles in the tourism visitor experience; -
- adequacy and cost of accessible taxis.

Review methodology

The Minister sought industry input by writing to all accredited drivers and operators of taxis and chauffeured driven vehicles (Appendix), while the Panel undertook extensive public consultation to obtain a broad range of views. This included:

- meetings with key stakeholders (Appendix)
- written submissions from key stakeholders
- comments from the general public through a notice in the Advertiser (Appendix)
- an online survey (Appendix) that could be accessed via a QR code (Appendix) in all taxis and some chauffeured vehicles.

All of the submissions and survey feedback were considered by the panel and used to provide a better understanding of the public opinion about current services and how the industry as a whole could be improved. Several stakeholders expressed concern about their submissions being released for public comment and the therefore in consideration of stakeholders views and for commercial in-confidence reasons the Panel has decided to keep all submissions to the Review.

The panel also considered, where appropriate, the work of other recent comprehensive taxi and hire-car reviews, including those in other jurisdictions and some conducted overseas.

Additionally, the Panel requested an independent analysis of the economic contribution of the taxi and chauffeured vehicle industry, which is provided in Section 4 of this report.

Panel members

The Panel members, Michael Luchich, Greg Crafter AO and Jane Jeffreys, bring an array of expertise in business, IT, public administration, tourism and hospitality.

Michael Luchich has more than 20 years senior executive, board and commercial experience across a range of industries and organisational structures in Australia and overseas. He is State Director of the global IT organisation Dimension Data, and was formerly the State Director of Telstra in SA/NT. He has also previously held Executive positions with Dell Computers Australia, Olivetti Australia & Datamatic Australia. His current Board appointments are, Chair of Carnegie Mellon University Advisory Board, ACH Board Director and Flinders Medical Centre Foundation Board Director.

His previous Board appointments include, Chair of the Australian Information Industry Association, University of South Australia ITR Advisory Board Director, Chair of the Adelaide Festival Centre Foundation.

Honourable Greg Crafter AO was a former South Australian Government Minister (1982 – 1993), a member of the Passenger Transport Board (1994-2004) and Chair of the Passenger Transport Standards Committee. He was a member of the national Board of Calvary Hospitals from 2006 - 2015 and is currently a member of the Board of the South Australia Housing Trust.

Jane Jeffreys is an experienced company director who has worked widely in business, tourism and hospitality, including executive and consulting roles to both the public and private sectors. She has held Executive positions with Hilton Hotels, The Adelaide Casino and the University of South Australia. Her current board appointments include the South Australian Tourism Commission, Funds S.A., West Beach Trust. Her previous Board appointments include, of the Adelaide Convention Centre and Director of Tourism Australia. She is also a facilitator for the AICD Company Directors courses conducted in South Australia and Interstate.

5. Review Context

5.1 Service Standards and Opportunities for Improvement

Context

The general service standards of taxis within metropolitan Adelaide have not progressed in line with customer expectations. Taxis are often not available to cater for peak demand or are late and opportunities exist to improve vehicle cleanliness, driver and service responsiveness. New models of service provide opportunities for improving access to services, but may require changes to vehicle standards. There is a need for a level playing field for on demand transport providers in South Australia.

South Australian Taxi Industry

In South Australia, metropolitan taxis have a restriction on entry through a licensing system. All other passenger vehicle categories, including country taxis, have no limitations on numbers and do not have licences.

Pre-booked services for taxis are open to direct competition from hire cars and minibuses and the restricted service aspect for taxi licenses relates to provision of taxi rank and street hail services. Limitations on operators relate to minimum vehicle quality.

Any unmet demand in the taxi industry can be taken up by these alternative point-to point services.

A key concern for the taxi licensing system is to ensure that there are adequate numbers of wheelchair accessible taxis to meet the needs of those passengers who require use of specially fitted taxis.

Regulation of taxis does not only manage the number of taxis, it also includes vehicle standards, driver training, service standards, including disability access, and driver behaviour standards, health and criminal history. These are areas of regulation that overlap with public safety. The *Passenger Transport Act 1994* and passenger Transport Regulations 2009 are predominantly concerned with passenger safety and welfare, including protection from exploitative fare practices.

The *Passenger Transport Act 1994* regulates passenger transport services across all transport modes including accreditation and licensing of passenger transport drivers and fitness to drive. The Government has announced a major review of transport laws which include the Passenger Transport Act. This is to be progressed from 2016 to establish an integrated Transport Act and thereby reduce duplication, red tape and the costs of compliance/enforcement and aiming to ensuring better compliance, customer service and the safety of all users.

These regulations do not currently prohibit smart phone app and technology companies from providing services but requires them to become accredited under the legislation which was designed around traditional “bricks and mortar” style businesses.

Safety is a common issue for customers and the Government may consider introducing a safety system akin to other transport industries e.g. rail safety act, chain of responsibility in heavy vehicle regulation. Compliance could be part of this review as well as vehicle standards. The prescriptive approach has not worked to date and there needs to be more of an outcomes focus.

Competition Policy Review 2014

In 2014, Professor Ian Harper and an expert panel undertook an independent review of competition policy for the Federal Government. The Competition Policy Review Final Report on 31 March 2015 made 56 recommendations for reforms across three key themes: competition policy, laws and institutions. A recommendation addressing taxis and hire cars was included (Harper et al., 2015)

The final report states:

Taxis and ride-sharing

Reform of taxi regulation in most jurisdictions is long overdue. Regulation limiting the number of taxi licences and preventing other services from competing with taxis has raised costs for consumers, including elderly and disadvantaged consumers, and hindered the emergence of innovative passenger transport services. Regulation of taxi and hire car services should be focusing on ensuring minimum standards for the benefit of consumers rather than on restricting competition or supporting a particular business model. An independent body should oversee the regulations.

Taxi regulation should be reviewed taking competition into account. Those jurisdictions that have undertaken or are undertaking reviews should implement the reforms.

The Competition Policy Review Recommendation 10 – Priorities for regulation review

Further to Recommendation 8 and in addition to reviewing planning and zoning rules (Recommendation ()), the following should be priority areas for review:

Taxis and ride-sharing: in particular, regulations that restrict numbers of taxi licences and competition in the taxi industry, including from ride-sharing and other passenger transport services that compete with taxis.

More detailed discussion in section 10.2 of the final report includes the following statements:

Regulations governing quality cover areas such as the age of vehicles, roadworthiness, driver presentation and knowledge, as well as access to radio dispatch facilities. These regulations are aimed at ensuring minimum standards to promote public confidence that taxis are safe and will provide a minimum standard of service. On the whole, they appear to impose little cost on the taxi industry and their customers because they do not significantly restrict competition between taxi services.

Although laws that regulate safety and minimum service levels are commonplace in the Australian economy, the taxi industry is virtually unique among customer services industries in having absolute limits on the number of service providers.

Technological change is also disrupting the taxi industry, with ride-sharing apps, such as Uber, connecting passengers with private drivers. Traditional booking methods are also being challenged by the emergence of apps such as GoCatch and Ingogo.

...The Panel does not endorse illegal activity, nor encourage new players to ignore or defy relevant laws or regulations. The Panel's primary concern is to ensure that the regulations respond to changes in technology in a way that allows new entrants to meet consumer demand, while continuing to ensure the health and safety of consumers.

Although taxi reform is not expected to make a major contribution to national productivity, the sector is an important component of metropolitan transport and can be particularly important for the mobility of the elderly and those with a disability. More affordable and convenient taxi services give consumers options. Significantly, reduced barriers to entry could see more services operate at peak times, without needing to operate at off-peak times.

The focus of reform in the taxi industry needs to be twofold: to reduce or eliminate restrictions on the supply of taxis that limit choice and increase price for consumers; and to encourage technological change that can benefit consumers. There is also an opportunity for the taxi industry to consider a reduction in the current level of red tape that applies to their industry.

An important element of reforming regulation should be to separate out CSOs (Community Service Obligations) currently embedded in taxi regulation and fund those CSOs explicitly. This would allow the taxi industry and ride-sharing services to compete with each other more effectively.

And

Regulations cover minimum quality standards for taxi services, a range of other requirements that amount to Community Service Obligations (CSOs), restrictions preventing other services from competing directly with taxis and restrictions limiting the number of taxis that can operate.

The taxi and chauffeur vehicle industry needs to exist within the context of Australia's approach to competition.

Complaints and Commendations

Both complaints and commendations have been steadily decreasing each year since 2009. However, the customer experience is that taxi services are in need of improvement.

Two main complaints from passengers are about the condition of the cars and drivers. Drivers, operators and Central Booking Services must take responsibility for their industry and in particular maintain their fleets, keep them clean and serviceable.

Industry should take more ownership of management issues such as the uniform requirements for drivers. Taxi management (taxi owner / licence holder / CBS etc) should take more direct responsibility to ensure that their employees are presented favourably every time they have contact with the public.

Taxis are inspected every six months. There is a perception that different inspection centres provide a different standard of inspection. There is a possible conflict of interest where a company is being paid by the customer to inspect a vehicle where the customer does not want faults identified.

Recommendations

1. **Allow new entrants and technologies into the market.**
2. **Review the licence fees for all providers and make more equitable.**
3. **Introduce a user friendly complaints mechanism independent of industry across the entire on demand passenger transport network.**
4. **Encourage national harmonisation. Given recent Australian history of transport reform there is now an opportunity for a national approach to on demand travel that has a consistent national regulatory framework.**

5.2 Safety and Security for Passengers and Drivers

Context

Taxis must be available 24 hours per day, cannot refuse reasonable requests for hire and must respond to pre-booked, street hails and taxi rank requests for hire. They also must accept cash where that is offered by the passenger as payment. These requirements can place drivers at risk because passengers can be anonymous, direct drivers to unsafe locations or be targets for theft. For passengers, the drivers and vehicles they catch have an element of chance. As such taxis must have 24/7 GPS tracking of the vehicle and CCTV surveillance as deterrents (and possible evidence) against incidents. CCTV does not include audio recording outside of an incident resulting in

incomplete records of the events leading to incidents. SA Police and the Taxi Council SA have indicated support for audio recording to be used only for investigative purposes.

Chauffeured vehicles must only accept prebooked work, including as soon as possible requests through apps. Anonymity of passengers and drivers is significantly reduced or eliminated. They are not required to have GPS tracking or CCTV.

Anonymity of drivers is an issue for passenger safety including as a deterrent and for investigations. Individual PINs to log in to taxi despatch systems and smart phone apps that identify drivers in other on demand transport address this to a significant extent, but both are fallible.

One option is to restrict on demand transport to pre-booked requests. This is an unreasonable expectation for the public and may limit their ad hoc hiring of vehicles from the street or rank and options for payment (e.g. by cash).

Police and transport inspectors need to be able to easily visually identify a vehicle in the event of an incident or to target on demand vehicles for random (roadworthiness) inspections. Removable signage can be obstructed, removed or interfered with by drivers or perpetrators of an offence to minimise detection. Non-removable physical identifiers and technological alternatives should be considered.

A common unique identifier (e.g. PIN) and use of multiple driver identification systems can enhance customer confidence and safety. CCTV systems in taxis can be improved to fully record available information in a taxi using encrypted technology (e.g. audio).

Motor vehicles can be involved in accidents which can be exacerbated by vehicles with inadequate safety standards; either because vehicles are too old to have contemporary safety design features or are poorly maintained. Driver behaviour is a major contributor to accidents. New vehicle safety systems can reduce accidents and trauma. These systems include predictive collision avoidance, through driver warnings and vehicle to pedestrian communication as well as night vision, and virtual vehicle navigation systems.

The heavy vehicle industry has implemented chain of responsibility requirements ensuring vehicle standards and safe driving practices are the responsibility of all parties involved in the delivery of the service. On demand public transport could readily adopt a similar regulatory environment.

The Panel believes that multi-lease operators who lease large numbers of taxis (but don't own the licences) must take greater responsibility to enforce proper management systems and sustain a high level of service delivery.

Comprehensive and robust records of events leading to incidents should form part of the chain of responsibility requirements.

As a deterrent, appropriate penalties need to be applied for on demand transport providers that acknowledge the seriousness of offences. The South Australian Civil and Administrative Tribunal (SACAT) have been established to deal with offences under licensing and accreditation systems. At present all disciplinary functions are dealt with by the Passenger Transport Standards Committee.

Passenger Transport Standards Committee

The Passenger Transport Standards Committee (PTSC) was established under the *Passenger Transport Act 1994*. It is a statutory committee separate from DPTI but is provided administrative support by the Department which is the regulating agency for the Act. Division 5 of the Act grants powers to the committee which has three roles:

- Determine the fitness and propriety of people seeking to obtain or renew accreditation for all on-road public transport operators, drivers and centralised booking services.
- Adjudicate in matters related to breaches of the Act and the Passenger Transport Regulations 2009. This involves determining whether someone has breached the legislation, and if they should be disciplined in the form of a fine, suspension or disqualification from accreditation.

- Consider applications from industry for exemptions and plans of operation relating to public passenger vehicles. This includes vehicle age and kilometre limit approvals, and the suitability of a vehicle in relation to the provision of passenger transport services.

Committee members are appointed by the Minister for Transport and Infrastructure and selected from the general community. They have expertise in a variety of areas, including medicine, the law, social justice, transport, tourism and vehicle standards.

The *Act* prescribes that a committee must have quorum of three members for each proceeding. Members are chosen to comprise a quorum on the basis of their expertise and availability. Currently there is a pool of 19 members from which a quorum for each meeting is derived, including five chairs.

Unlike a judicial body, the PTSC is not bound by the rules of evidence but can make decisions based on the balance of probabilities and in the public interest. Decisions may be appealed in the District Court which can review the procedures and overturn a decision. The court can impose its own penalty or decision based on the *Act* and regulations.

Penalties range from a caution through to fines, suspension, disqualification or permanent disqualification of accreditation. A suspension means a person's accreditation is automatically reinstated at the end of the suspension period and a disqualification means a person must reapply (and usually appear before the committee) before their accreditation can be granted.

In 2014-15 the PTSC met on 89 occasions and considered 277 matters including:

- 142 accreditation applications
- 134 disciplinary matters
- One vehicle related matter.

After enquiries, the PTSC found no cause for disciplinary action against 19 accredited people, while the remaining accredited people were fined, required to undertake re-training or reprimanded.

Consistency and adequacy of penalties of on demand transport with other industries could be addressed through the SACAT.

Despite this effort the concerns about taxi services remains a real issue. Change is needed.

Recommendations

1. **Implement universal taxi driver certification and identifier which is consistent throughout the industry to facilitate the elimination of rogue drivers and practices.**
2. **Implement legal accountability, similar to provisions in heavy vehicle industry regulations, to all parties involved in the on demand passenger transport industry for their actions or inactions. This will encourage good behaviour and penalise any person or corporation who gains an unfair commercial advantage by breaching passenger transport legislation, road laws, or risks road safety.**
3. **Activate audio recording capability as part of the existing security cameras in taxis. This will support the investigation of incidents and complaints.**
4. **Only taxis permitted to do rank and hail work.**
5. **In order to provide an appropriate level of policing of the industry, consideration be given to the greater utilisation of inspectorial officers across government agencies.**

6. Driver accreditation photo identification must be displayed across all vehicle categories at all times and also to be available on any fixed and wireless booking devices
7. Each chauffeur vehicle is to display an approved identifier as a basic measure of security
8. Review the effectiveness of the deterrent value of the current range of legislative penalties for non-compliance, particularly in line with recommendation 2.1.3 (legal accountability/chain of responsibility) and consider the introduction of on the spot fines.
9. Chauffeured vehicles centralised booking offices are required to have a physical address and contact person resident in South Australia who can provide evidence to police and investigators.
10. All drivers who consistently receive bad ratings from passengers and/or who transfer within the industry with immunity must be reported to the Regulator.
11. Transfer of the functions of the Passenger Transport Standards Committee to the South Australia Administrative Appeals Tribunal, in all matters except issues relating to health and fit and proper person criteria where specialist panels are to be retained.

5.3 Driver Remuneration and Working Conditions

Context

The industry has traditionally relied on a steady flow of temporary drivers, which reflects a lack of investment and commitment to retaining good drivers. Apart from input into the taxi fare model, there has been little consideration of driver wages and conditions and the consequential impacts this has on services provided by the driver.

Taxi drivers are not employees of operators or Centralised Booking Services and generally earn income on the number and type of jobs they undertake.

A driver's working conditions (i.e. occupational health and safety and fatigue management) are usually managed by the taxi operator. Operators determine the general condition and presentation of the vehicle; its age, roadworthiness, presentation and amenity. As the operator incurs these costs, fares taken in taxis must be shared between drivers and operators.

Taxi drivers are engaged by a taxi operator to drive their taxi vehicles under a bailment (rental) agreement. These bailment agreements set out terms and conditions the driver is required to agree to use the licensed taxi for a period of time and in exchange the drivers is required to pay either a fixed shift amount or a percentage of the metered fare takings (usually 50/50% in South Australia).

Booking services directly influence the ease and positive experience of booking a taxi and are positioned to influence the overall quality, timeliness and reliability of the service through incentives and penalties within their pool of taxis. Driver income can therefore be impacted through their performance in their duties.

Submissions from the taxi drivers have referred to the low income they receive. They must cover periods in which they do not drive, such as annual leave and sick leave themselves and superannuation from any earnings.

Other Australian jurisdictions have attempted to address the issue of driver remuneration through bailment agreements (e.g. in Victoria a driver must get 60% of the fare) although this is directly affected by the amount of work taxis, and therefore their drivers get.

There may be less capacity to offer drivers a greater share of the income, where there are multiple levels of people deriving an income from the taxi. For example, lease operators earn approximately 11% of the taxi income available for redistribution (based on the economic date contained in Chapter 4).

Taxis pay a considerable Compulsory Third Party Insurance Premium compared to other metropolitan small passenger vehicles (in excess of six times the CTP for MV vehicles). Country taxis in the outer metropolitan regions are required to pay higher CTP premiums as they are considered to be metropolitan by the Motor Accident Commission but under the Passenger Transport Act they are deemed to be country taxis.

The ACT Compulsory Third-Party (CTP) Insurance Regulator has recently established a new class of premiums for rideshare vehicles and announced a reduction in rates for taxis, passenger cars and hire cars.

Table – Annual vehicle fees

	TAXI		CHAUFFEUR			
	Metro Taxi	Country Taxi	MV Plate	TV Plate	SV Plate	NV Plate (country)
Registration Fee ⁴	\$243	\$243	\$243	\$243	\$243	\$243
Insurance Premium (CTP)	\$4399	\$599	\$647	\$647	\$647	\$476
Vehicle fee	\$0	\$85	\$1912	\$85	\$85	\$85
Proposed	\$85	\$85	\$85	\$85	\$85	\$85

Table – Approximate Annual costs

Per Annum costs	Driver	Operator	Centralised Booking Service
Accreditation	\$55	\$425	\$924
DCSI working with children clearance (3 years)	\$37	N/A	
National Police Certificate	N/A	\$20	\$20 (per director)
Lease	\$33,000 (based on \$1,300 per week driver income)	\$20,000 (approximately)	
CBS base fees	N/A	\$8,000	
MTData System	N/A	\$1,300	
Cameras	N/A	\$900	
Public Liability Insurance	N/A	\$100	

New models (ridesharing) allow drivers to keep a greater percentage of the fare (up to 75%), although this needs to include fuel and vehicle costs borne by the driver.

Enhancing the viability of taxi operations by reducing costs and providing the industry with greater choice and flexibility in the services they provide is expected to increase the demand for taxis, provide more jobs and better remuneration leading to a higher standard of driver.

Driver income could be increased if their engagement arrangements were different, for example if they were employees of operators or were paid an hourly rate (similar to chauffeur vehicle drivers).

Allowing multiple booking services for taxis would provide a range of benefits including:

⁴ Registration fees are \$118 for 4 cylinder vehicles.

- improve taxi drivers ability to access more work rather than being restricted to only one centralised booking service resulting in increased remuneration and improved service levels;
- potentially reduce the burden of phone operations on CBS therefore reducing the costs of CBS.

If there was an opportunity for drivers to purchase and operate their own taxi licence at affordable prices, it could result in improved conditions and the potential for drivers to earn more income.

Recommendations

1. **The Minister to consider issuing on a fixed term basis or leasing a fixed number of low cost new owner/driver plates/licences, which are to be driven by the owner and not further leased. This is a new category of taxi plate encourage small business participation, career based drivers and long term involvement in the industry.**
2. **The Minister to review annual on demand metropolitan passenger transport fees on the basis of a more equitable impost across both taxis and chauffeured vehicles following substantial de-regulation of the industry.**
3. **Allow multiple booking services for taxis for greater customer choice and industry efficiency and responsiveness.**
4. **Review the CTP insurance arrangements for on demand passenger transport providers to determine the reason for discrepancy in premiums.**

5.4 Fares and Surcharges

Context

A common complaint is that taxis are too expensive. The maximum fare charged by taxis is regulated under Schedule 3 of the Passenger Transport Regulations 2009. The process for setting fares involves the taxi industry requesting a fare increase and costs being assessed against cost movements on a range of key cost components using a Taxi Cost Index.

Taxi fare increases and the analysis of cost movements are conducted retrospectively; taxi fares are at least six months behind real cost changes.

Premium taxis (e.g. Silver Service) can apply booking fees but premium taxis need to be approved under regulations as a special type of taxi service. No other booking fees are allowed in South Australia. The taxi fare structure does not provide flexibility for booking services to tailor services to customer needs.

New taxi booking services, presently operating in other jurisdictions, that could offer choice to customers use booking fees and other charges (for example cancellation fees) to fund and support their services. The present fare structure does not allow for new ways of providing taxi services.

All other on demand transport, such as chauffeured vehicles, has negotiated fares with a booking office or operator (which encompasses advertised set fares, final fare prices negotiated at point of contract and formula for calculating a fare, as occurs in some app based booking systems). Taxi companies argue this allows competitors to have dynamic pricing which enables the competitors to undercut taxi fares at times and an unfair advantage in attracting drivers away from taxis when competitors can apply surcharges for peak demand periods.

Payment systems in taxis (e.g. Cabcharge) must be approved under Regulation 64A. Despite there being 5 approved payment providers for taxis, all charge 10% (or more) of the total fare for payment services. Rather than competition

among these providers that directly results in lower charges for paying passengers, competition appears to be directed at inducements to operators and drivers to use their payment services.

At present operators are responsible for determining the electronic payment systems in taxis, leading to drivers operating payment systems without their operator's knowledge to maximise their income.

Chauffeured vehicles in the Traditional Vehicle category have a minimum fare requirement of \$20. This has not been adjusted since the 1990's. The distinction between traditional vehicle and metropolitan vehicle should be abolished.

Taxi fares could be set by an independent body such as ESCOSA as occurs in other jurisdictions. In NSW fares are set by Independent Pricing and Regulatory Tribunal (IPART) and in Victoria by the Essential Services Commission.

The electronic payment surcharge in Victoria was reduced from 10 per cent to a maximum of 5 per cent (incl. GST) on 1 February 2014. This was implemented as a result of government endorsement of a recommendation from the Taxi Industry Inquiry of 2011/12. Part 3 of the *Transport Legislation Amendment (Foundation Taxi and Hire Car Reforms) Act 2013 (Vic)* (Taxi Fares and Taxi Non-Cash Payment Surcharges) applies to taxi fares where payment is made by a non-cash payment method, including using a credit, debit or charge card, eticket or smartphone apps or a (Cabcharge or other) voucher to pay for the taxi fare. Other States including NSW and WA, are implementing 5% caps on electronic payment fees.

Jurisdictions allow booking fees and alternative tariffs.

Region	Booking Fee \$	Flagfall \$			Kilometre Rate \$			Multiseat Fare	Premium Service Fare
		Tariff 1 (day)	Tariff 2 (night)	Tariff 3 (peak)	Tariff 1	Tariff 2	Tariff 3		
Sydney	2.50	3.60	6.10	2.50 fee	2.19	2.63	-	Up to 150% on Fare	-
Melbourne	2.00	4.20	5.20	6.20	1.62	1.80	1.99	\$14 fee	\$11 Fee
Brisbane	1.50	2.90	6.30	2.00 fee	2.17	2.17	-	\$10 fee booked only	Fee or additional % on negotiation
Adelaide	-	3.70	4.90	-	1.77	1.94	-	30% additional to Tariff 1 and 2	\$5 - \$10

The NSW government recently announced in December 2015 that it will amend legislation to allow taxi fares for pre-booked services to be set by negotiation at the time of booking while rank and hail will be scheduled. A potential issue with this is taxis ignoring rank and hail work at scheduled rates in favour of higher paying pre-booked work, when other on demand providers cover this market.

Allow booked fares in taxis to be calculated and agreed /accepted as a total fare in advance (i.e. does not have to be on the meter). By allowing booked fares to be negotiated individually or in bulk, and including all fees and charges (including the Adelaide Airport service fee) passengers then know exactly how much they will pay and can shop around for best rates. Negotiated and pre-booked fares (even in taxis) should be able to be paid in advance.

NSW and Victoria are moving away from prescribing taxi- meters in taxis and allowing fare calculation devices. Many existing app based and GPS fare calculation devices do not have accurate dead reckoning with potential inaccuracies as vehicles travel through GPS "blind spots" such as tunnels. For rank and hail work GPS fare calculations should be at least as accurate as taxi meters and new systems are developing this. Negotiated pre-booked fares can be calculated on existing GPS fare calculation devices and an accurate estimate should be provided to the passenger prior to the commencement of the journey.

Fare calculation and payment services which link to booking or despatch systems in all forms of on demand transport provide the most accuracy for auditing and validating trip information by passengers (for personal or business purposes) or by police and department investigators.

As referred to later in the report, chauffeur vehicles in the traditional small passenger vehicle category (TV) should only be undertaking “traditional limousine” type work, including weddings, funerals, formals and special occasion chauffeur services and therefore should be prohibiting these vehicles from undertaking on demand work. As a result the minimum \$20 fare requirement for chauffeur vehicles in the TV category could be removed as these vehicles will no longer compete with metropolitan on demand passenger transport providers.

Recommendations

1. All taxi fares to remain as metered fares.
2. ESCOSA to undertake an annual independent review of taxi fares.
3. Decisions with respect to numbers and fees of premium taxi operations to be determined by owners and operators.
4. Reduction of credit card fare payment transaction fees attributed to the consumer to be no greater than 5% of the total fare.
5. Prohibit on demand work under the Traditional Vehicle category and remove the \$20 minimum fare requirement.
6. Passenger fares of chauffeured vehicles, including new entrants, to be transparent and an accurate estimate provided to the customer prior to commencement of the journey.

5.5 Training and Accreditation Requirements

Context

Training

The South Australian Taxi Driver Training Course meets the national competencies for taxi driver training, which were independently developed by the Transport and Logistics Industry Skills Council and approved by Transport Ministers at the Australian Transport Council in November 2009. These training requirements are designed to establish well prepared drivers that provide high quality service and safety standards within the taxi industry for customers and drivers.

The feedback from passengers throughout the review was that taxi customer service standards are lacking and drivers often present before the Passenger Transport Standards Committee claiming they are unaware of regulations, which indicates shortcomings in the current training process.

Presently training for drivers is provided through two recognised training organisations (RTO's) under an approval from DPTI. Up until September 2015 the two RTOs were the Taxi Cab Training Centre of the Access Training Centre and the Transport Training Centre. When the Transport Training Centre ceased operations in September, the Taxi Council SA was approved by DPTI as an interim measure to provide driver training (as the Taxi Council was already an approved RTO for taxi operator training). All trainers from the RTOs have Certificate IV Training and Assessment qualifications.

Both RTOs have been criticised for being too closely associated and controlled by the taxi industry.

Taxi driver training is a 5 day course and consists of 4 days in the classroom and 1 day on road practical driving a taxi and operating all the equipment including assessments. It is then followed by 384 hours of on road training and 2 professional development modules. Consistent feedback to the Review is the process is overly convoluted and takes too long. The Review has been told of the process taking 40 days to complete or longer.

While the national competencies for driver training covers the operational aspects of providing a taxi service there is a lack of customer service culture, cultural awareness and tourism related modules.

All states and territories adopted the English language proficiency and all, except Victoria, adopted the national competency units for training.

The Knowledge of Adelaide requires a person to be at least 80% correct to pass as having sufficient knowledge. Since the implementation of Knowledge of Adelaide learning resource and testing sessions in 2010 - 89% of candidates have passed the knowledge assessment. The remaining 11% are not suitable for taxi driving as they do not reach the basic entry requirement.

Chauffeured vehicle drivers receive a half day course primarily on regulatory responsibilities, as well as an English language and road law assessment and an in-vehicle driving assessment. The Chauffeured Vehicle Industry believes that the training for small passenger drivers is inadequate and believes *'there is no specific training based upon the actual experiential role of a being a value-added chauffeur, with skills based on life knowledge of protocols and serious job training. It is crucial to have an understanding of on-the-job training'*⁵

There is no separate category of country taxi driver accreditation. Country Taxi drivers may be accredited either as small passenger vehicle drivers or metropolitan taxi drivers. They undertake the training either small passenger or taxi driver for the relevant category in which they hold accreditation.

The chauffeur vehicle industry and each of the current taxi Centralised Booking Services have requested the Review to consider allowing them to provide training to drivers so that they can better influence the quality of drivers in their fleets and streamline the process.

The current training program for both taxi and chauffeured vehicles does not appear to provide for any consistent or ongoing development of drivers.

There is no compulsory training program proposed for on demand passenger transport drivers in New South Wales. The New South Wales On demand Transport Taskforce recommended the requirement for a prospective Sydney taxi driver to satisfy the Regulator they have passed an assessment or that they meet the 'National Minimum English Standard' requirement be removed. Instead, the Taskforce has recommended a taxi organisation is given flexibility in determining how to satisfy itself that a driver meets that standard.

Accreditation

DPTI has a responsibility, in accordance with the *Passenger Transport Act 1994* and associated regulations, to ensure taxi drivers are of good repute and in all other respects a fit and proper person to be the driver of a public passenger vehicle. Driver accreditation is a means of providing a minimum standard for all drivers of public passenger vehicles. It includes an assessment of the person's driving qualifications with the requirement for an appropriate drivers licence, a medical fitness assessment against nationally recognised standards, a criminal history assessment and an approval to 'work with children' to verify that the person is of good repute and in all other respects a fit and proper person to drive a public passenger vehicle.

New entrants to the market have suggested third party criminal checking of drivers. Risk arises through the potential conflict of interest with transport companies setting the standards for driver and vehicle checks, particularly in times where drivers and vehicles are in short supply.

In New South Wales, the taskforce proposed that criminal history checks no longer be conducted by the Regulator. Booking services and taxi organisations are required to ensure drivers do not have any offences disqualifying them from accreditation and are periodically audited to ensure they are meeting the obligation appropriately.

⁵ Submission from the Chauffeured Vehicle Association, page 5

Considering the level of risk to passengers and drivers, it is considered prudent that the government continue to undertake all criminal history and working with children checks relating to accreditation in South Australia. Having one independent regulator undertaking these checks ensures a robust vetting process and promotes consistent outcomes.

In the survey for this review, there was an overwhelmingly positive response to the proposal that the Government should be able to automatically suspend someone charged with a serious criminal offence such as rape or assault (over 90% of respondents considered this to be important in the taxi and chauffeured vehicle survey). In the interest of public safety, the government could introduce disqualifying criminal offences to passenger transport legislation that would specifically exclude people from accreditation if they have been convicted of a scheduled offence.

The current process for sanctioning minor breaches of the Act and Regulations is dealt with by expiation. Alternatively, a defendant may elect to be prosecuted for the offence. The only penalty available is a monetary fine and there are no other consequences to a driver's accreditation. A penalty points or demerit points regime could be considered for minor offences (like the scheme in place for breaches of Australian Road Rules) leading to a suspension or disqualification of the person's accreditation. This would provide more general and personal deterrence from committing minor offences. A similar scheme has recently been legislated in Western Australia, but has not yet commenced.

Recommendations

1. Establish new and improved training programs to provide consistent and ongoing development of drivers. Taking into account national best practice in industry training and in consultation with interest groups, establish a roots and branches review of the training provision for this industry. The training of drivers and operators must address vehicle and driver presentation, driving and safety skills, cultural awareness, use of technology, access to up to date state tourism and event information, English language skills, a culture of customer service and knowledge of metropolitan Adelaide and regions.
2. Ensure all training providers are appropriately qualified, independent of vested interests and meet relevant competitive tendering requirements.
3. All public transport drivers, including new entrants, must have the same independent checking process (determined by government) for criminal history working with children, medical health and vehicle roadworthiness and amenity.
4. Amend passenger transport legislation to include disqualifying offences.

5.6 Vehicle Standard and Requirements

Context

Vehicle standards differ between taxis and chauffeured vehicles. Taxis must comfortably carry four adult size passengers and have adequate head and leg room.

Chauffeured vehicles have specifications around the vehicle wheelbase and class of vehicle. Chauffeured vehicles require ministerial approval for each model and type of vehicle which is cumbersome and can lead to inconsistencies.

In addition, chauffeured vehicles have different vehicle standards (in age and kilometre limits) depending on the category they are accredited in. Use of vehicles for different purposes to historical models has resulted in a lack of clarity on vehicle standards for different categories, notably Metropolitan (MV) and Traditional Vehicle (TV) accreditations.

The present requirements for chauffeured vehicles are that they be “Top of the Range” for that manufacturer, resulting in vehicle choice limitations. Equivalent top of the range standards do not exist across manufacturers or in the perception of the public (e.g. Hyundai vs. Mercedes) leading to varied quality.

The chauffeured vehicle industry opposes the not for hire sign needing to be displayed at all times. A bright yellow and black sign does not have the importance it once did prior to the development of smartphone app based booking systems and detracts from the customer experience, particularly in the premium service market.

Broadening the range of vehicles that can be used for taxis and chauffeured vehicles will increase customer and operator choice and assist to future proof against the changing vehicle market. The Standard could be set as equivalent or greater than a sedan style taxi or could be broader and allow smaller vehicles. To give customers greater control over the vehicle they hire, operators, through advertising, and booking services/apps could indicate the type of vehicle – at a minimum if it is small, medium or large. This will reduce red tape for Ministerial approval, and address inconsistencies and rigidity in the types of vehicles that have been approved as chauffeured vehicles in the past. Booking services/operators would be free to determine their own market niche.

Any on demand work should be in a single vehicle accreditation category (or be a taxi). The traditional category for chauffeur vehicles could be retained for vehicles that only provide transport for wedding, formals, tours and other specific events. Alternatively these “special event” service vehicles could be placed in a Special Vehicle category – which differentiates only on the basis of the class of vehicle for registration purposes (e.g. stretch limousine, motorbike, super car, vintage and veteran and 4 wheel drive).

Age limitations exist to ensure fleets remain contemporary and vehicles maintain up to date improvements in vehicle safety and features. Age extensions could be allowed on the basis of safety features, maintenance and exceptional presentation. Older vehicles may not meet contemporary vehicle safety standards.

The taxi industry has suggested a 5 year maximum age limit for sedan style taxis to replace the existing 6 and a half year maximum age. Reducing the maximum age for taxis will ensure Adelaide has a modern fleet which maintains the latest advancements in environmental, safety and amenity standards and features for vehicles and attractiveness to the public.

If chauffeur vehicle age limits do not change from 6 and a half years or increase, this will result in differing age limits for chauffeured vehicles and taxis.

The size of the vehicle is important for taxis undertaking rank and hail work where passengers may have little choice as to the type of vehicle available when they wish to hire it. The vehicle must have adequate passenger and luggage carrying capacity, particularly for servicing tourism and hospitality sectors (such as the Airport and hotels).

Vehicle standards can impact on environmental issues such as climate change and air quality through exhaust. The taxi industry provides an opportunity to develop an environmentally responsible on demand transport system as they are continuously on the road providing rank and hail services as well as pre-booked.

The NSW government announced in December 2015 that taxi vehicle standards will remain as four door sedans and the standard for vehicle roadworthiness for on demand vehicles be retained, that is, the standard required for passenger vehicle registration. Although inspection requirements for registration purposes of all vehicles used for on demand transport will be aligned to those of other light vehicles, they will need to be inspected once a year, at a minimum, regardless of vehicle age. Vehicle registration categories will be revised in light of the flexible use of vehicles across different categories of registration, with guidelines for defining “private use” recommended as an initial step to be developed and vehicle owners required to nominate at registration that their vehicle is being used for on demand services. Regulations are being removed on specifications for vehicles used to deliver on demand transport services and maximum age limits.

In Victoria chauffeured vehicles providing on demand transport have a maximum age limit of 6 and half years for a non luxury vehicle, which must be under the luxury car tax threshold. Luxury vehicles are approved by model and manufacturer and have a 5 or 7 year age limit depending on the vehicle. Vehicles that can be used as taxis are specifically listed by model and manufacturer and have prescriptive standards including door height and width, seat height, shoulder width, and leg room measurements. The maximum age for a conventional taxi is 6 and a half years.

Not for hire signs were used to prevent chauffeured vehicles from undertaking rank and hail work. Not for hire signs could be regarded as redundant, given new technology and booking systems.

Environmental impact issues can be addressed through vehicle standards on fuel emissions. Environmentally “green” vehicle standards for taxis could be adopted.

Any change in vehicle standards, including age, should only apply to new vehicles from the date of those changes, thereby ensuring a natural transition period.

Recommendations

1. **Establish contemporary vehicle standards for all current and new industry entrants. Minister to consider:**
 - strict adherence to roadworthiness standards;
 - amenity of all passenger transport vehicles;
 - compliance with passenger and driver security standards;
 - all vehicles must meet established standards of passenger and luggage carrying capacity;
 - reducing the taxi vehicle age limit from 6.5yrs to 5 years for all new taxi vehicles.
2. **The industry to commit to environmentally sustainable practices and in particular the goal of carbon neutrality.**
3. **Position taxis as an integral part of developing Adelaide as a Global Smart City.**
4. **Establish a “Green Taxi” initiative for eligible taxis in existing fleet and new entrants to be Green Coded, which may include:**
 - vehicle type (electric, plug in hybrid, petrol hybrid, diesel, petrol);
 - new technology provisions which enable the measurement of motor vehicle and driver performance;
 - on/off engine technology while stationary and other emerging technologies;
 - re-branding to identify “Green Taxis”.
5. **The Minister and industry representatives to engage in discussions with motor vehicle manufacturers to develop environmentally sustainable vehicles for use by the taxi and chauffeured vehicle industry.**
6. **Remove the current restrictive policies to increase the range of vehicles to be eligible for use as chauffeured vehicles in the Small Passenger Vehicle Metropolitan Vehicle (MV) and Traditional Vehicle (TV) category.**
7. **Establish a clear distinction between MV and TV categories to ensure that all pre-booked on demand work is MV accredited.**
8. **Allow contact details to be discreetly displayed on chauffeur vehicles.**
9. **Exempt chauffeur vehicles from displaying a not for hire sign.**

5.7 Centralised Booking Services

Context

The current booking systems for taxis are outdated and give priority to the business over customers e.g. the customer's destination is provided to the driver so he/she has the discretion rather than the customer. There is also an issue with separate call centres which has created duplicated infrastructure which is reflected in taxi fares. The new app based on demand providers such as Uber do not have this problem, nor do app based booking services for taxis.

There needs to be a "no destination policy" introduced where the CBS is not told the destination of the passenger to encourage all potential trips to be taken up and reduce the amount of times passengers are left waiting for a taxi that does not arrive as it is perceived to be a short fare.

Taxis have different requirements for booking services than do chauffeured vehicles.

Centralised Booking Services for taxis require accreditation as a separate entity from an operator of a taxi. Booking services, called booking offices, for chauffeured vehicles only need to be approved under a chauffeured vehicle operator's accreditation.

Both types of booking services require a physical presence (or office) in South Australia. Centralised Booking Services for taxis have a number of regulated requirements beyond providing a booking and despatch service including fleet support services for safety and security, livery/signage, lost property assistance and driver welfare. New app based booking services for taxis have entered the market in other states, notably Victoria and NSW. These have been quick to adopt innovative systems for customer bookings and payment services.

Victoria has separated fleet services and security from booking systems. This frees drivers and passengers to choose the best booking services for their needs, increases competition in booking services and frees operators to choose a fleet support service provider separately from the booking system.

Removing trip destination information for drivers so that short or low paying jobs are less likely to be refused. Regulations requiring outcomes rather than being prescriptive in how tasks are managed, for all forms of booking services, can assist with greater flexibility for booking services but ensure minimum expectations by customers are met.

Recommendations

1. Establish criteria to ensure passenger, driver and public safety, vehicle roadworthiness standards and compliance to service standards required of the industry including such matters as lost property retrieval.
2. During peak hour times and in order to provide a more responsive service to consumers, establish processes and procedures to achieve greater co-operation between Radio Rooms and Booking Services.
3. Country taxis be allowed to co-service outer metropolitan areas – such as Adelaide Hills, Willunga, Gawler region.
4. Consideration is given to alignment of the metropolitan boundaries under the Passenger Transport Act 1994 and those defined by the Motor Accident Commission.
5. Introduce a 'no destination' policy where the CBS is not told the destination of the passenger to encourage all potential trips to be taken up and reduce the amount of times passengers are left waiting for a taxi that does not arrive as it is perceived to be a short fare.

5.8 Synergies with other forms of Public Transport

Context

Regional – Many regional communities have limited access to accessible and affordable passenger transport services. Opportunities exist in those regional cities and towns where country taxi services exist to better coordinate and integrate all forms of passenger transport services available in a region.

Metropolitan – Taxi services and other private passenger transport services are often considered as a separate and isolated industry to other forms of public transport. These services deliver a significant number of transport trips to the community and therefore need to be better integrated into the broader public transport network to provide a holistic approach to moving people around Adelaide, particularly during times of high demand.

Regional - The Government currently supports a number of passenger transport services in regional areas ranging regular route services, dial-a-ride, demand responsive services, dedicated medical or disability based services and tailored service packages that meet specific needs. While DPTI has introduced integrated transport packages in some regions, which combine education, medical and other social services, it is critical that this model continues to be expanded and also include other forms of transport such as taxis and other passenger services. Some service models, particularly long distance route services present a number of financial challenges to maintain viability and therefore greater integration with alternative services such as greater use of school and community buses as well as creating partnership with local taxis and hire car services provides a more sustainable model in the longer term.

The Government also supports 12 Community Passenger Networks (CPNs) across regional SA whose role is to provide information regarding transport services in their region, coordinate and broker services and provide direct transport where no other appropriate services exist. These CPNs are managed by DCSI however are currently transitioning to the federal government for clients 65 years and over. DPTI is working with DCSI to ensure the preservation of DPTI's contribution to these services which could then be used to address specific transport disadvantage in CPN regions.

The outer Adelaide metropolitan areas are not adequately covered by taxis, particularly in the Southern and dill regions metropolitan taxis tend to congregate where there is more work such as the CBD and Adelaide airport.

Metropolitan – Greater representation and participation from the taxi and passenger transport industry is required to position this industry as a key component of the public transport network in Adelaide. This can include courtesy vehicles which are currently not accredited and are therefore an unknown quantity in the industry.

Recommendation

1. **Country taxis are allowed to co-service outer metropolitan areas such as the Adelaide Hills, Willunga and the Gawler region.**
2. **Review the alignment of the metropolitan boundaries under the Passenger Transport Act 1994 and those defined by the Motor Accident Commission.**
3. **Taxi and Other private transport services operating in regional areas to be considered as a critical part of the review shortly to be commenced in the target regions. These forms of transport will need to form part of the broader solution to address transport disadvantage in regional areas, including representation on any future Regional Access Committees and participation in local trials and pilot programs.**
4. **Taxi and passenger transport services to be regularly consulted and participate actively in planning of future regular transport services, i.e. local neighbourhood or late night services as well as planning for major events. Review the accreditation of courtesy vehicles.**

5.9 Innovation, New Technologies and Competition

Context

Since 2006 when the Passenger Transport regulations were amended that introduced PINs for driver log in to taxi booking systems and continuous GPS tracking of vehicles, there have been significant advances in technology.

Mobile apps enable people with smartphones to request and often pay for transport via the phone app. The request is either directed to a taxi driver, chauffeur vehicle driver or a private individual depending on the model of service. The best known of these is Uber, which offers several service options to customers, including their “ridesharing” service known as UberX in Australia, where drivers use their own private cars. In these service models, vehicle, service and driver standards are determined and checked by the app. booking company.

The South Australian legislation presently holds the operator of a chauffeur vehicle service responsible for the booking and booking information regardless of whether it is through a third party provider. Bookings for taxis can only be made through accredited Centralised Booking Services.

The travelling public has embraced the new technology and the responsiveness of the new entrants to the sector.

New entrants whose services are based on the use of mobile technologies cannot either avoid regulation or be excluded from the industry. There needs to be ongoing consideration of their impact as they emerge in the market.

Entry to the Adelaide taxi market is restricted through a licensing system, which is first sold through tender by the government and can then be transferred or sold in the market. The current value of general taxi licences is approximately \$300, 000 (a decrease from \$375, 000 four years ago) with Access Taxis around half that amount. Taxi licences have been sold by the government since 2007-08.

The taxi and chauffeured vehicle industries believe allowing the entrance of new on demand transport providers under a different set of regulations for ridesharing services may diminishes the value of their business. In addition, mandated training for drivers, security cameras and other customer safety and service requirements add costs, which the ridesharing models do not incur, as proposed.

The State government has never placed a minimum value on taxi licences and the market has therefore set the value of taxi licences.

Since the late 1990s, SA has always had an open market in the pre-booked area with chauffeured vehicles being able to undertake on demand metropolitan work (excluding rank and hail). While taxi licence values may fluctuate, competition from chauffeured vehicles has not diminished the taxi industry.

Both New South Wales and Victoria provided some form of assistance to owners of perpetual taxi licences. The Victorian Government established a hardship fund of \$4 million to provide assistance to owners of perpetual taxi licences facing severe financial hardship and the New South Wales inquiry recommended assistance funded through either a consolidated fund or through a levy on the on demand industry. The Panel does not have a firm view on the need for compensation and if compensation was to be considered, the following issues would require consideration by government:

- an appropriate level of compensation; and
- criteria used to determine real hardship against mismanagement or a desire to simply retire from the industry or sector.

The new technologies in personal communication has enabled significant innovation in the booking service area with the emergence of taxi booking companies including GoCatch, ingogo, Oiii etc. These booking systems only allow registered taxi drivers, driving metered taxis, to take fares through their app, and cross checks drivers' accreditation with the relevant regulatory authority in each state.

The Panel believes that opening the market by allowing increased competition within the on-demand passenger transport industry will improve consumer choice, price competitiveness and may lead to an increased focus on consumer experience.

Allowing a taxi driver to register with more than one booking service (currently they are only restricted to one CBS) to increase access to more work resulting in increased remuneration for the driver and improved responsiveness for the consumer.

Require all metropolitan on demand service providers to work within the current vehicle inspection regime applying to metropolitan chauffeured vehicles.

Consideration needs to be given to the provision of assistance to perpetual taxi licence holders based on hardship, due to the introduction of innovative new models of service, which could be funded by implementation of a levy on all metropolitan on demand transport journeys.

Recommendations

1. **Establish a Taxi and Chauffeured Vehicle Advisory Committee comprising an independent Chair and membership with expertise in tourism and events, retail, technology, business, transport and representation from the Taxi and Chauffeured Vehicle Industry with responsibilities, which may include:**
 - Development and strategic direction of the industry with an emphasis on growth.
 - Monitoring national and global trends.
 - Monitor the needs of regional South Australian communities.
 - The development of an environmentally sustainable industry that complements infrastructure and economic development.
 - Advise on standards in relation to complaint mechanisms, customer service and driver quality.
 - Advise on policy development.
 - Best practice monitoring.
 - Oversee the establishment of a professional training curriculum and registered training organisations.
 - Provide regular periodic data on performance of the industry.
2. **The Taxi and Chauffeured Vehicle Advisory Committee to be consulted in the planning stages of all major development projects where there is likely to be an impact on passenger transport.**
3. **Implement an Industry Development Levy of \$1 per journey for all taxi and chauffeured metropolitan vehicles, which will be used to improve the sector as a whole with all revenue to be deposited into a taxi and chauffeur vehicle development fund and to be applied for the orderly development of the industry.**

5.10 Taxi and Chauffeured Vehicles in the Tourism Visitor Experience

Context

The tourism sector reports taxi drivers are often unaware of tourism and cultural events, and locations.

Tourism is a major contributor to economic activity in South Australia. Tourists spent \$52 million on taxi fares in South Australia in 2013-14, representing about 22% of total expenditure of taxis in the state.

The taxi driver and their vehicle often provide the first impression for visitors to South Australia and, in most cases, are also one of the last contacts in Adelaide. For visitors a positive impression can influence investment and confidence in the state.

There is no unit in the taxi training program or in the chauffeured vehicle training, which specifically addresses tourism.

In some countries key public transport people are identified as ambassadors e.g. staff on train from airport in Hong Kong. Concierges at taxi ranks and taxi drivers could also be tourism ambassadors, as could other drivers of on demand transport.

Bodies with a strong interest in tourism and cultural events have indicated promotional initiatives could include taxi drivers (including tickets and invitations to events) to incentivise drivers to promote events.

New booking services interstate have partnered with airlines and event organising agencies to promote and offer benefits to customers.

New technology through apps and other mechanisms can deliver information on tourism and events directly to passengers. New York City taxis have been doing this for some time through video screens, but advances in personal communication mean that greater amounts and personalisation of promotional material is available.

Recommendations

1. All taxis, chauffeured vehicles and new entrants be required to provide passengers with up to date tourism and event information.
2. All taxis, chauffeured vehicles and new entrants to have a mobile, readable matrix type based optical barcode (e.g. QR code) that contains live “what’s on in Adelaide” for events and information on South Australia.

5.11 Adequacy and Cost of Accessible Taxis

Context

The availability of wheelchair accessible taxis (Access Taxis) during peak demand periods is lacking for customers. When Access Taxis are late, this can have severe impacts for passengers with disabilities.

Passengers using access taxis can be financially disadvantaged compared to users of standard taxis because drivers can potentially charge passengers waiting time rates while they are assisted into and out of the vehicles. Training of Access Taxi drivers is provided by the Access Taxi Centralised Booking Service.

Payment for Access Taxis is through the SA Transport Subsidy Scheme, which is still paper voucher based and leads to potential for mistakes and misuse.

Encourage all on demand transport to provide wheelchair accessible services. The National Disability Insurance Scheme (NDIS) has responsibility for funding transport services to people with disabilities aged under 65 years. At present the NDIS in South Australia is supporting children but will gradually assume responsibility for adults. The NDIS will assist people to access a choice of transport options which will not be limited to taxis. South Australia is “cashing out” the subsidy payments for SATSS members eligible for the NDIS and transferring funding. For people not eligible for the NDIS due to their disability or age, any transport subsidy payment will remain with the State Government.

Wheelchair accessible vehicles can be encouraged through a variety of mechanisms including lower government fees and charges and longer life spans through reduced age restrictions on vehicles. Future taxi licences could be directed to wheelchair accessible vehicles. There are presently 102 Access Taxi licences for Adelaide.

Chauffeured vehicle providers, who compete directly in the taxi market place, should be aware that they are not immune from Disability Discrimination Complaints if they do not provide wheelchair and other accessible services.

At present there is a single centralised booking service for Access Taxis in Adelaide. The alternative is that all booking services be required to provide wheelchair accessible services. This need not be restricted to taxis.

In 2014-15 the average waiting time for Access taxis was equivalent to general taxis. The average waiting time for Access Taxis was 8.50 minutes during the day (6 am to 6 pm), which is less than the 8.97 minutes for general taxis. Between 6 pm and 6 am the average waiting time for Access Taxis was 10.00 minutes, which is a 0.08 minute difference longer than the average waiting time of 9.52 minutes for general taxis.

The government could consider replacing waiting time charges with a set lifting fee for Access Taxis. Scheduled fares should not commence until the vehicle is moving and cease when the vehicle comes to a stop. Smart taxi meters and GPS based systems can determine vehicle movement and location.

Performance based payments and incentives (e.g. the on time bonus paid in SA) encourage Access Taxi drivers to respond to requests for hire quickly and reduce waiting times.

The SA Transport Subsidy Scheme should adopt new technologies, for example smart card and or app based electronic payment and verification systems. Electronic payment of the SA Transport Subsidy Scheme could allow the scheme to be extended to other on demand providers.

Taxi Subsidy Schemes and Lift Fees in Australia

Jurisdiction	Smartcard	Lift fees & Incentives
New South Wales	No	\$7.70 lift fee, per passenger
Victoria	Yes (2007)	\$16.50 lift fee for wheelchair accessible taxis. \$8.25 lift fee for conventional taxis.
Queensland	Yes (2007)	N/A
South Australia	No	No lift fee. 'On time bonus', \$5 to driver plus \$1 to booking company if driver arrives within 12 minutes.
Western Australia	No	\$10 lift fee for a rank/hail job, \$12 lift fee for a pre-booked job.
Tasmania	Yes (2014)	\$20 lift fee, per passenger.
Northern Territory	Yes (2010)	\$20 lift fee per trip.
ACT	Yes (2013)	\$13 lift fee, per passenger (increases on public holidays).

"Talking" taximeters and electronic fare calculation systems can inform passengers of the scheduled fare.

Easy and direct feedback systems on drivers from passengers can assist with identifying poor performance. Training for Access Taxi drivers should be provided by disability (training) organisations to ensure customer needs and expectations can be directly addressed.

Recommendations

1. **The Minister to investigate:**
Implementation of a flat charge Lifting Fee while loading a passenger and redefine and clarify the definition of the commencement of a journey. The Lifting Fee should be in addition to a revised on-time bonus.
2. **Selection, Training and Accreditation of drivers to take into account the specific requirements of this sector of the community.**
3. **Introduction of significant penalties and deterrents for drivers, operators and booking services that do not meet service level requirements.**
4. **Introduction of user friendly complaints mechanism independent of industry.**
5. **Revision of tender documentation to ensure that there is appropriate sanctions to achieve strict adherence to response times in line with the Commonwealth Disability Discrimination Act 1992.**
6. **Revision of tender documentation to ensure the application of new technologies and processes to minimise non-compliance and fraud.**

6. The Economic and Social contribution of the South Australian taxi and chauffeur industry.

The Review Panel considered it necessary to understand the nature and extent of the economic impact of the taxi industries in order to chart for it a positive future.

Unfortunately it is not possible to calculate the social and other immeasurable contributions the taxi and chauffeur vehicle industry makes to the economy and general well-being of the residents and visitor to South Australia.

The taxi and chauffeured vehicle industry provides direct and indirect employment to thousands of workers and provides necessary transportation services. This section of the report estimates the economic contribution of the taxi industry, narrowly defined to exclude for-hire small passenger vehicles, such as traditional vehicles, pre-booked metropolitan vehicles like chauffeured cars and special purpose vehicles like wedding hire cars and ride sharing services.

Summary of the analysis

As part of the review, The Panel commissioned Cadence Economics to estimate the economic contribution of the taxi industry to the South Australian economy. The analysis is confined to taxis only, and does not consider chauffeured vehicles other specialist hire car operations and ride sharing services, but includes consideration of upstream supply sectors like maintenance, cleaning and fuel. The economic contribution considered in the report relates to direct and indirect value added (that is, the contribution to gross state product) and employment, including separate treatment of the contributions made by drivers, operators, CBS and licence holders for the financial year 2014/15.

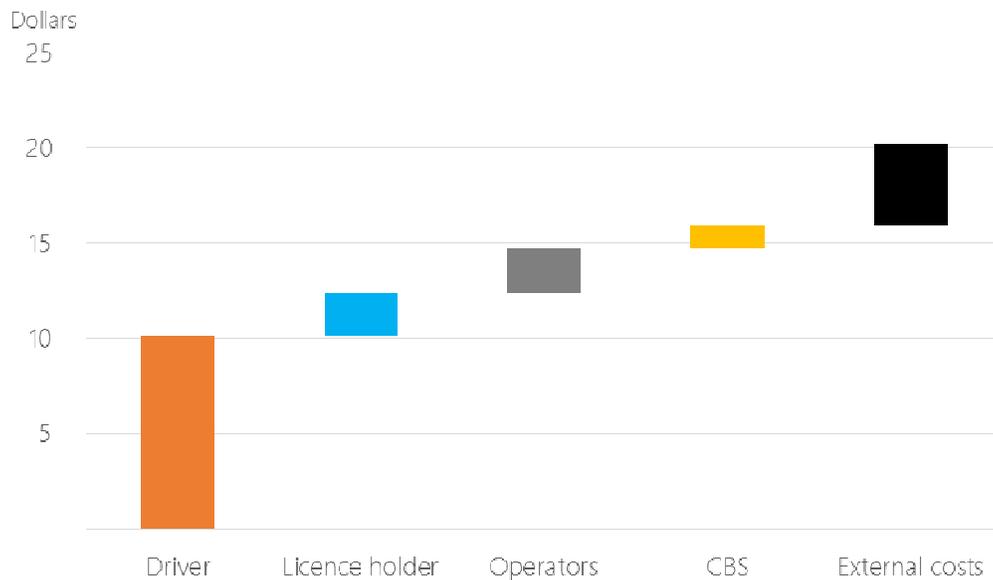
This report summarises the analysis undertaken to determine the economic contribution of the South Australia taxi industry, and includes:

- a summary of the key statistics underpinning the analysis
- an assessment of the aggregate revenue generated by the industry
- distribution of the revenue that accrues to drivers, operators and CBS
- analysis of the industry's cost structure in order to assess the direct and indirect contribution of the industry to value added and employment.

Key points

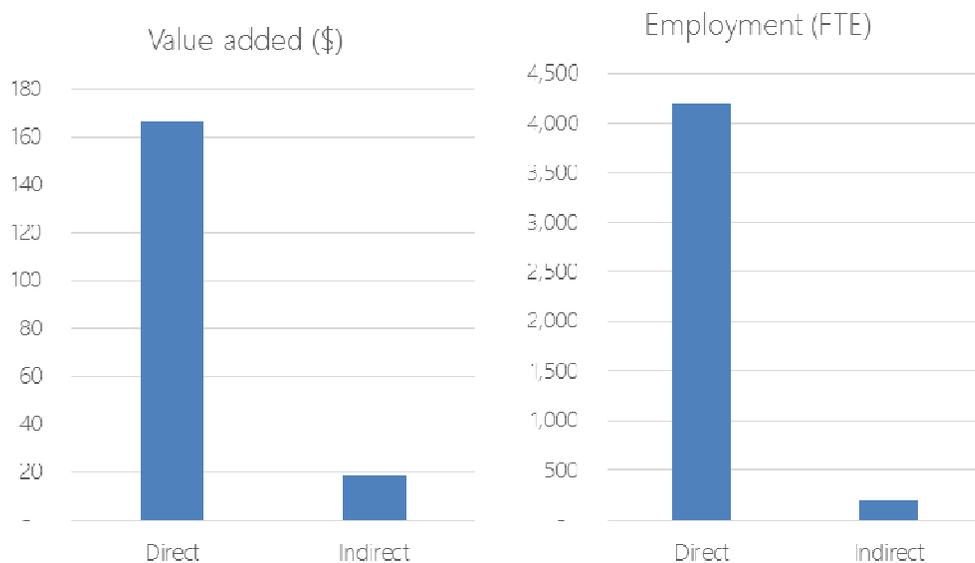
- Analysis shows that in 2014/15 there were 4,496 accredited taxi drivers and 1,080 accredited taxi operators in South Australia.
- There were 1,362 taxis in operation at May 2015 undertaking an average of 7,985 trips per year.
- Metro taxis account for 1,137 of the total taxis in South Australia with an average fare of \$21.50 (incl. GST – or \$19.55 excl. GST), with 225 taxis in non-metro areas attracting an average fare of \$25.80 (incl. GST – or \$23.45 excl. GST).
- Taking into account the number of taxis in each region the average fare across the State is \$22.21 (incl. GST or \$20.19 excl. GST).
- The total revenue estimated for taxi services is estimated to be \$242 million in 2014-15.
- The distribution of revenue to drivers, operators and CBSs from an average \$20.19 fare is shown in **Figure 1**. Our analysis shows that drivers receive 50% of an average fare, with operators and licence holders receiving about 11% each, CBSs about 6% and external costs including maintenance and fuel accounting for about 20% of the typical fare.

Figure 1: Average fare (a) – distribution of activity



- (a) Average fare excludes GST
- (b) Upstream costs of approximately \$46m were paid by taxi industry in 2014-15. The main suppliers include fuel, maintenance, insurance, registration costs and car repayments.
- (c) The direct value added contribution of South Australia’s taxi industry was approximately \$167m in 2014-15, consisting of \$113m in wages and \$54m in gross operating profit (return to capital including taxes). This accounted for about 0.17% of South Australia’s Gross State Product (GSP) in that year.
- (d) The South Australian taxi industry accounted directly for 4,200 full time equivalent (FTE) employees in 2014-15.

Figure 2: Economic contribution of the South Australian taxi industry, summary results



- (e) The indirect value added and employment associated with upstream suppliers is estimated at \$19m and 194 FTE respectively in 2014-15.

- (f) The combined direct and indirect contribution of the taxi industry to South Australian GSP in 2014-15 is estimated to be \$185m, with an associated total employment contribution of 4,394 FTE.

Table 1: South Australian taxi industry – key data

Information source	
Information from ATIA (a)	
Average metro fare (incl. GST) (\$)	21.50
Average non-metro fare (incl. GST) (\$) (c)	25.80
Average number of taxi trips per year (d)	7,985
Information from DPTI (b)	
Number of taxis	1,362
Metro	1,137
Non-metro	225
Accredited taxi operators	1,080
Drivers per taxi	2.3
Accredited drivers	4,496

(a) ATIA - Calendar year 2014

(b) DPTI - at May 2015

(c) Derived from ATIA, assumed to be 20% higher than metro fares

(d) Derived from ATIA data, indicating 10,164,900 taxi trips per year (2014) and the number of taxis 1,273 at December 2014.

Revenue estimate

The South Australian taxi industry generated \$242m (incl. GST) in revenue for the financial year 2014-15. As described in **Table 2** the large majority of this revenue, or \$195m, is due to metro taxis. Each year metro taxis undertake 7,985 jobs with an average fare of \$21.50 (incl. GST), while non-metro taxis generate \$46m in revenue at slightly higher average fare of \$25.80 (incl. GST) per trip.

Table 2: South Australian taxi sector – revenue by region

Region of South Australia	
Metro	
Number of taxis	1,137
Jobs per taxi per year	7,985
Average revenue per trip (\$)	21.50
Revenue (\$m)	195
Non-Metro	
Number of taxis	225
Trips per taxi per year	7,985
Average revenue per trip (\$)	25.8
Revenue (\$m)	46
Total Revenue (incl. GST)	242
Total Revenue (excl. GST)	220

Source: Cadence Economics estimates

For the purposes of the economic contribution analysis we remove the GST component of \$22m from the analysis. This is consistent with the standard National Accounting framework attribution of taxes on products (such as the GST) to households rather than the industry where the tax has been raised.

Break down of revenue and cost structure

Table 3 provides an account of the cost structure within the sector, including the incomes earned within the sector and the external costs. Drivers receive wages of \$110m representing approximately 50% of total revenue, while operators and licence holders receive \$25m each and \$14m is paid to CBS. Operators incur \$46 million in costs that are supplied from other sectors of the economy, including maintenance and registration costs.

Table 3: Revenue and distribution of activity, \$m, 2014-15

	\$m
Revenue	220
<i>Drivers</i>	110
<i>Licence payments</i>	25
<i>Operators</i>	25
<i>Revenue to CBS</i>	14
External Costs	46
<i>Insurance cost</i>	5
<i>Registration Cost</i>	8
<i>Car Repayments</i>	7
<i>Miscellaneous</i>	5
<i>Maintenance</i>	12
<i>Fuel</i>	8

Direct contribution of the taxi industry

Directly the South Australian taxi sector contributes \$167m in value added, primarily through wages paid to drivers, with \$50m in value added through license payments and operator incomes. As payments to labour and capital these flows represent immediate contributions to direct value added in South Australia.

To estimate the value added generated in the CBS sector we applied our in-house Cadence Economic Regional Input-Output Model (CERIOM), indicating a direct value added share of 50% of revenue. The value added in the CBS sector is made up of \$3m in wages paid to employees and \$4m of gross operating surplus.

Table 4: South Australian taxi industry, direct value added contribution, \$m

Sector	\$m
Driver wage income	110
Licence income	25
Operator income	25
<i>CBS revenue</i>	14
<i>Direct value added share of revenue (a)</i>	50%
CBS direct value added	7
<i>Wages paid</i>	3
<i>Gross Operating Surplus</i>	4

(a) Cadence Economics Regional Input-Output Model

In total the South Australian taxi sector contributed \$113m in wages and \$54m in gross operating profit (return to capital including taxes), accounting for 0.17% of South Australian GSP.

Direct employment contribution

The South Australian taxi industry made a direct employment contribution of 4,200 FTEs in the financial year 2014-15 through drivers and those employed in the CBS sector. Drivers accounted for a large majority of the direct employment at 4,140 FTEs. As outlined in **Table 5** the average driver worked almost 50 hours per week.

The CBS sub-sector made a further direct contribution of 60 FTE with an estimated wage bill of \$3m at an estimated average wage rate of \$47,876 per year.

Table 5: South Australian taxi industry, direct employment contribution

Employment (FTE)	
Drivers	
Number of Taxis	1,362
Average hours worked per taxi per week	114
Full-time equivalent worker (hours per week)	37.5
FTE (37.5 hours per FTE per week)	4,140
Centralised Booking Services employment	
Revenue (\$m)	14
Labour income share of revenue (%) (a)	21
Total wages paid (\$m)	3
Assumed average wage rate (b)	47,876
Total CBS employment (FTE)	60
Total Employment (FTE)	4,200

(a) Cadence Economics Regional Input-Output Model, (b) 2011 Census of Population and Housing – Total Personal Income for the Transport Support Services sector South Australia and Cadence Economics estimates

Indirect contribution of the taxi industry

The taxi industry indirectly contributes \$19m of value added to South Australian Gross State Product. The indirect contribution represents the value added generated within the state in sectors that supply the taxi industry with intermediate inputs including maintenance services and fuel.

Vehicle registration contributes \$6m to State value added, with maintenance contributing a further \$5m. While fuel is a significant input for taxi operators, it only contributes a relatively small share to value added as only 13% of the money spent on fuel stays within the State, including as wholesale and retail margins.

Table 6: Indirect value added contribution

Sector	Total intermediate inputs (\$m)	Assumed SA domestic share (%) (a)	Total value added percentage (a)	Indirect value added to SA (\$m)
CBS costs	7	100	35	2
Insurance cost	5	47	67	2
Registration cost	8	100	71	6
Car repayments	7	31	42	1
Miscellaneous	5	65	60	2
Maintenance	12	67	62	5
Fuel	8	13	73	1
Total	53			19

(a) Cadence Economics Regional Input-Output Model

The South Australian taxi industry makes an indirect employment contribution of 194 FTE to the State, primarily through employment generated in vehicle maintenance and public sector employment resulting from vehicle registration costs. A complete breakdown of indirect employment is provided in **Table 7**.

Table 7: Indirect employment contribution

Sector	Total intermediate inputs (\$m)	Assumed domestic share (%) (a)	Employment to inputs ratio (a)	Employment in SA (FTE)
CBS costs	7	100	3.0	21
Insurance cost	5	47	3.4	9
Registration cost	8	100	6.9	54
Car repayments	7	31	4.8	11
Miscellaneous	5	65	6.3	22
Maintenance	12	67	8.2	67
Fuel	8	13	10.3	11
Total	53			194

(a) Cadence Economics Regional Input-Output Model

Social contribution

In the discussion above we have outlined the contribution of the South Australian taxi industry to economic activity and modelled the value added and employment generated by the sector. The contribution analysis set out above is a narrow form of value generated by a sector, as it does not take into account the role the sector plays in meeting the needs of its users, nor the consumer surplus accruing to users of taxi services. Taxis supply services to users that have special needs or cannot access other forms of transport because of the times they are travelling. Also, taxi transport is used extensively by tourists visiting South Australia.

Special needs users

The South Australian Transport Subsidy Scheme (SATSS) administered by the South Australian Government provides vouchers for people with permanent and severe disabilities who cannot use public transport because of their disability. Similar schemes operate in other states and territories of Australia, which allows people with disabilities enhanced opportunities to work and participate in social activities that may otherwise be limited. Members of the scheme are able to access 80 trips over a six month period. Members are classified into two categories,

- Ambulant members (available for people who are able to walk, but are not confined to a wheelchair); and,
- Wheelchair members.

At November 2015 there were 70,488 members of the SATSS, with 26,933 of those being classified as active members.

Table 8: South Australian Transport Subsidy Scheme (at November 2015)

South Australia	
SATSS members (No.)	70,488
Active members (No.)	26,933
Type of members	
Ambulant	23,619
Wheelchair	3,314
Activity members by region	
Metro	86%
Regional	14%
Total subsidies paid (\$m) (2012-13)	\$10.6

Source: South Australian Department of Planning Transport and Infrastructure

The South Australian Government spent \$10.6m on the scheme for the 2012-13 financial year.

Contribution to the night time economy and tourism activity

Taxis provide important services to people who engage in the night-time economy, such as socialising with friends over a meal and alcoholic beverages. The economic activity associated with night-time activity is significant and government stakeholders have identified ways to increase the use of late night activity. A recent study suggests the night time economy in Adelaide attracted \$1,016m of expenditure and employed 10,361 people.⁶ Through the *Good Evening, Adelaide* strategy the South Australian Government and the Adelaide City Council have identified ways to increase activity in the city after 5pm. The strategy outlines both safety and transport as the main issues that impact city visitor's likelihood to stay in the city and enjoy Adelaide's attractions.

Tourism is a major contributor to economic activity in South Australia, generating \$6,656m in tourism consumption in 2013-14. Tourists spent \$52m on taxi fares in South Australia, representing about 22% of total expenditure on taxis in the state, see **Table 9**.

⁶National Local government Drug and Alcohol Committee, *The Australian Night Time Economy and the NTE Economic Performance of Key LGAs 2009 to 2013* (2015)

Table 9: Tourism consumption, in South Australia (a) by product – 2013-14

Sector	\$m
Tourism characteristic Products	
<i>Accommodation services</i>	647
<i>Actual and imputed rent on dwellings</i>	384
<i>Takeaway and restaurant meals</i>	1,011
Taxi fares	52
<i>Local area passenger transportation</i>	46
<i>Long distance passenger transportation</i>	1,056
<i>Motor vehicle hire and lease</i>	112
<i>Travel agency and tour operator services</i>	222
<i>Recreational, cultural and sporting services</i>	174
<i>Gambling and betting services</i>	78
Total tourism characteristic products	3,783
Tourism connected products	
<i>Shopping (including gifts and souvenirs)</i>	793
<i>Food products</i>	447
<i>Alcoholic beverages and other beverages</i>	302
<i>Motor vehicles, caravans, boats etc.</i>	187
<i>Fuel (petrol, diesel)</i>	768
<i>Repair and maintenance of motor vehicles</i>	68
<i>Education services</i>	145
Total tourism connected products	2,709
All other industries	164
Total consumption	6,656

Source: Austrade, Tourism Research Australia, *State Tourism Satellite Accounts, 2013-14*

(a) at Purchases Prices.

Benchmarking the South Australian taxi sector

Queensland has the most active taxi sector when compared to the relative size of its economy. For each million dollars of GSP Queensland taxis travel just below 1,800 km. The high taxi activity of the taxi sector may be a result of the relatively high tourism activity within the state. South Australia in comparison has a relatively low proportion of taxi activity compared to other Australian states and territories with only 804 km travelled per million dollars of GSP.

Table 10: Activity in the Australian taxi industry, by state (a), at December 2014

	NSW	Victoria	Queensland	South Australia (c)	ACT	NT	Australia
Number of Taxis	7,347	5,778	3,264	1,273	316	209	21,344
Average job (km)	7.0	9.7	11.5	7.8	8.1	18.0	8.9
Total taxi km per year (million)	679	340	548	79	20	24	2,022
GSP (2014-15) (\$m)	513	361	305	99	23	35	1,610
Taxi km per million dollars of GSP (b)	1,323	942	1,795	804	851	699	1,256

(a) Australian Taxi Industry Association, *2014 State & Territory Taxi Statistics (as at December 2014)*

(b) Cadence Economics estimates

(c) as at December 2014, number of taxis used in the contribution

7. Current Taxi and Chauffeur Vehicle Industry overview

Legislative framework

Passenger transport in South Australia is highly regulated. The *Passenger Transport Act 1994* is supported by the Passenger Transport Regulations 2009 which bring together various regulations. These cover the accreditation of drivers, operators and centralised booking services (CBS) in the taxi and chauffeured vehicle industry, and what minimum requirements they need. They are also bound by codes of practice which are also contained in the regulations.

In general terms, the legislation is aimed at ensuring:

- The safety of passengers. Accreditation specifies drivers must meet medical and fitness standards, and have suitable equipment and procedures, including safety and security camera systems, and identification signage on taxis.
- Minimum quality and amenity of services. This includes minimum vehicle standards, such as age and size of vehicle, protocol for lost property, prevention of exploitation of customers through taxi-meter specifications and scheduled fares, requirements to accept a hiring, acceptance of all payment methods in taxis, expectations around CBSs and booking offices for chauffeured vehicles.
- Responsibility and accountability for vehicle safety and compliant equipment.
- The contracting of services and allocation of taxi licences.

The regulations also address passenger conduct to help provide a safe environment for drivers and the safety and comfort of other passengers.

Much of the regulation is prescriptive. This in part has arisen where regulation has been too open to interpretation or has been silent on topics that have then been exploited by operators or drivers.

Regulations range from determining uniforms for taxi drivers, through to a prohibition on overloading public passenger vehicle. Taxis are also highly regulated with regard to fares, customer service and passenger and driver safety.

Taxis are the only passenger service that can 'ply for hire' from ranks and street hails. Unlike hire cars, taxis must accept any reasonable requests for hire and must be available 24 hours per day.

To protect customers from potential exploitative fare practices, maximum fares are scheduled through regulation and are calculated by a tamper-proof meter. Taxis must also accept all forms of payment, belong to a CBS, have safety camera systems, constant GPS recording (even when not operating as a taxi) and clearly visible livery.

General and wheelchair accessible taxis must also meet requirements under the federal disability standards for accessible public transport. In addition, access taxi licences must only undertake wheelchair requests during dedicated hours and provide priority to wheelchair requests at all other times. Access taxi licences cannot be leased. Hire cars do not have any disability standards they are required to meet.

In South Australia there are four main participants in the taxi industry:

- licence plate owners
- taxi operators
- drivers
- centralised booking services.

There are three CBSs covered by regulation: 13 Cabs, Adelaide Independent Taxis and Suburban Taxis. Centralised booking services must accept bookings through various methods including telephone landlines.

Taxi operators are required to be affiliated with a CBS, fit the taxi with prescribed communication and safety devices, ensure taxis are fitted with the decals of the network, observe the published rules of the CBS and comply with all reasonable requests of the network.

General taxis must not exceed 6.5 years of age, while access taxis have a maximum life of eight years (with a possible two-year extension) and both types are inspected twice a year.

Taxi drivers are not employees of operators or CBSs and generally earn income on the number and type of jobs they undertake. This is influenced by competition within the taxi industry and from hire cars in the pre-booked market and fluctuations in demand.

Over the years, premium taxis have also been introduced which compete directly with pre-booked hire cars. Premium taxis provide a higher quality of vehicle standard and service delivery and provide a 'chauffeured vehicle' experience. Consequently they are permitted to charge a fare determined by contract. Premium taxis are not additional licences in the fleet, but rather replace existing vehicles.

Currently the taxi industry in South Australia has 1,138 taxi licences, which includes 1036 general licences, 102 access taxis, and approximately 19 standby plates (this number can increase or decrease at any time). The value of these licences or plates is driven by market forces including demand, return and the number of new licences and plates issued annually the government.

Vehicle drivers

Drivers in the taxi and chauffeured vehicle industries are predominantly male. Currently there are approximately 4,500 accredited taxi drivers and 4,200 small passenger drivers (SPDs).

All require accreditation to ensure they are fit and proper to drive a taxi or hire car. New applicants and drivers seeking a renewal must obtain a medical certificate and a national criminal history check, including a working with children clearance, through the government's screening unit. (Other states and territories only require a working with children check for drivers undertaking contractual or regular work where they transport children or vulnerable adults.)

Applicants who have potential fitness and propriety issues are independently considered by the Passenger Transport Standards Committee, a statutory body under the *Passenger Transport Act 1994*.

Over the decades taxi drivers have tended to reflect settlement patterns in Australia. Returned servicemen from the Second World War, and other conflicts, comprised a discrete cohort of drivers in the 1940s and 1950s. In the 1960s people of southern European descent, notably from Greece and Italy, became taxi drivers, and this was followed in subsequent decades by people from Vietnam, other Asian countries of mostly Chinese speaking descent, and the Middle East (notably Iraq, Afghanistan and Iran).

In the past 10 to 15 years drivers have predominantly come from India and Pakistan. Tertiary students seeking income have also been a consistent group but they tend not to view the industry as a long-term career.

In contrast, chauffeur vehicle drivers in recent years have tended to be retirees from full-time employment.

Industry associations

The taxi industry is represented by Taxi Council SA (TCSA) whose members must hold current operator accreditation. This includes those involved in centralised booking services, lease operators and owners. The taxi driver of the year is also invited to be a council member together with a customer representative.

Representatives of the Department of Planning, Transport and Infrastructure (DPTI) and SA Police attend monthly council meetings for an information exchange, and in the past a representative of SA Tourism has also attended. Driver issues are considered by a driver welfare subcommittee.

Taxi driver associations have also existed at different periods but membership is dependent on issues effecting drivers. The Chauffeured Vehicle Association represents operators of hire cars, including stretch limousines. It does not appear that other business expertise is represented on the boards of these associations.

History of the taxi and chauffeur vehicle sector:

Taxis

1956 – Licensing of taxis in Adelaide began with the introduction of the *Metropolitan Taxi Cab Act 1956* and the establishment of the Metropolitan Taxi Cab Board. Prior to that taxis were administered by local councils. Initially there was a two-plate system for taxis operating in and from the Adelaide CBD and those in suburban areas. This was replaced in 1985 with a single system for all of metropolitan Adelaide.

1986 – Regulations were introduced to establish standby taxis to replace taxis temporarily out of service for maintenance, repairs or other reasons. They are also approved as additional taxis during peak demand periods such as New Year's Eve, Mad March and for specific sporting, entertainment and community events.

1990 – Leasing policy for taxi licences was amended to allow licence holders to immediately lease a licence after purchase, instead of having to own that licence for a minimum five-year period. That same year, 50 general taxi licences were released by ballot.

1991 – Mandatory training for taxi drivers was introduced.

1993 – Wheelchair accessible taxi licences were introduced and were made non-transferable, meaning they could not be sold or leased.

1994 – Introduction of the *Passenger Transport Act 1994* and its supporting regulations (for taxis this was the Passenger Transport (General) Regulations 1994) saw significant changes in accreditation for all passenger transport operators and drivers. Country taxis remained the licensing responsibility of non-metropolitan local governments.

The legislation provided minimum standards covering fitness and propriety and also service and vehicle standards. Accreditation was also introduced for centralised booking services responsible for bookings and despatching taxis. These requirements prescribed minimum service and safety standards, including global positioning systems and minimum response/waiting times of 12 minutes for metropolitan taxi services. The maximum age for taxis was reduced from 10 to eight years and a requirement for taxi drivers to wear an approved uniform was introduced.

The *Passenger Transport Act 1994* also established the Passenger Transport Board to administer the legislation and regulate the passenger transport industry. In addition, the *Act* introduced the Passenger Transport Standards Committee as a statutory committee to adjudicate on accreditation and disciplinary matters for the industry.

1997 – The prohibition on the sale of wheelchair accessible taxi licences was removed and new grades of licences were created. This enabled conditions to be placed on wheelchair accessible taxi licences, including vehicle and service standards, but the restriction on leasing out these licences remained.

1998 – The Passenger Transport (General) Regulations 1994 were amended, with most of the significant changes affecting the chauffeur vehicle and charter bus industries. The following changes relate specifically to the taxi industry:

- reduction in the age limit for taxis from eight to 6.5 years;
- maximum age of vehicles entering the industry was introduced and set at 3.5 years;
- requirements for all taxi operators to have a minimum \$5 million public liability insurance;
- introduction of standardised livery including a requirement that all taxis must be coloured white;
- location and type of advertising permitted on taxis, including company livery and signage;
- compulsory six-monthly testing of taxi meters;
- standardisation of taxi roof signs.

Also in June 1998, non-residents of South Australia were allowed to purchase a taxi licence.

2001 – Taxi security surveillance camera systems were introduced in amendments to the Passenger Transport (General) Regulations 1994.

2004 – The *Passenger Transport Act 1994* was remade, dissolving the Passenger Transport Board and transferring its powers to the Minister for Transport. The Department of Transport and Urban Planning (now Department of Planning, Transport and Infrastructure) assumed the regulatory role for the passenger transport industry.

2005 – A one-stop-shop – the Accreditation and Licensing Centre – was introduced for taxi services. This combined over-the-counter services provided by different agencies within the government and co-located them with TCSA to increase the convenience for drivers and operators.

2006 – Following a series of assaults, additional safety measures aimed primarily at passenger safety were implemented for metropolitan taxis. These included driver Personal Identification Numbers (PINs) and continuous GPS tracking which allows real-time monitoring of vehicles and provides a record of vehicle movement, even when all equipment in the taxi is deactivated. Large external, reflective taxi licence numbers were also introduced to vehicles.

2009 – Regulations under the *Passenger Transport Act* were remade and consolidated into one set of rules. The Passenger Transport Regulations 2009 revoked the Passenger Transport (General) Regulations 1994, Passenger Transport (Regular Passenger Services; Conduct of Passengers) Regulations 1994 and Passenger Transport (Regular Passenger Services; Fares and Charges) Regulations 1994.

Three new requirements were also introduced as pre-requisites for drivers before they could commence taxi driver training to qualify for accreditation. All new applicants must:

- have held a full Australian driver licence for six months;
- undertake a Knowledge of Adelaide assessment;
- undertake an English language proficiency assessment.

2010 – Taxi operator training for all new taxi operators was introduced. A National Criminal History Check and a valid clearance letter to work with children from the Screening Unit of the Department for Communities and Social Inclusion (DCSI) were also made a pre-requisite for accreditation. The maximum period of driver accreditation was fixed at three years.

2014 – Amendments to the passenger transport regulations came into force on 13 January and included the introduction of:

- additional offences under the South Australian Transport Subsidy Scheme (SATSS) aimed at reducing misuse and fraud;
- the Adelaide Metrocard ticketing system;
- EFTPOS payment standards in taxis;
- prohibition on the use of unaccredited taxi booking services;
- transit barring orders from all public transport;
- distinguishing bus number plates;
- measures to permit the Passenger Transport Standards Committee to use taxi security camera footage; for disciplinary matters under the passenger transport legislation;
- increased penalties for taxi fare evasion to align with penalties for other passenger services;
- offences for people whose behaviour brings the passenger transport industry into disrepute and for drivers and operators who fail to abide by the policies and procedures of the CBS.

Country taxis

Following the decisions by non-metropolitan local governments to cease licensing taxis, the Passenger Transport Regulations were amended in February 2009 to formalise the operation of country taxi services in South Australia. This included the introduction of a new category of country taxi accreditation and associated requirements.

The regulations formalised previous practice, provided consumer protection and allowed vehicles providing taxi services in regional South Australia, which did not have a licence from a local council, to call themselves taxis.

The amended regulations recognised and supported the right of local government to license taxis under the *Local Government Act 1934*. In addition, they provided a safety net of accreditation to ensure that country taxis could continue to operate as taxis outside of council areas that did license taxis.

Country taxis not licensed by local government cannot operate within a council jurisdiction which licenses taxis.

Under the regulations, country taxis are distinguishable by taxi livery and have distinctive 'country taxi' number plates linked to the accreditation or licensed by local government.

The City of Mount Gambier continues to licence taxis in its council area and requires these taxis to be accredited under the State Government system.

Taxi security

1996 – Shortly after the murder of a taxi driver in October 1996, the State Government worked with the taxi industry to consider a range of driver safety measures. These included improved systems, such as the leave porch light on campaign, improved driver training, and better technology, such as video surveillance and improved lighting.

1997 – At the request of the South Australian Taxi Association, a 1% levy on fares was introduced to fund safety initiatives. The levy was collected and retained by taxi operators to spend on safety and the government assisted by supporting video surveillance, duress alarm trials and community awareness and television advertising campaigns.

1998 – The final report of the Video Surveillance Review Group was the first initiative of its kind in Australia. It examined seven different surveillance systems and recognised cameras as effective in improving driver safety.

2001 – Amendments to the Passenger Transport (General) Regulations required all taxis to be fitted with a security camera system by 1 December 2001. This was extended until 1 February 2002 to ensure that operators had adequate time to select the most appropriate camera system.

Technology limitations meant the cameras were 'snap-shot' style, only taking images upon activation of an alarm by the driver. Limited storage capacity meant images were locked when the duress alarm was activated and cameras needed to be independently reset to start recording again.

2002 – Regulations were amended limiting audio recording in taxis in the event of an incident.

2010 – The cameras were reviewed and new specifications introduced from May 2011 for the protection of both passengers and drivers. This allowed continuous recording of at least one image per second without the need for driver activation. Alarm activation tags the images to assist with investigations and also allow audio recording of the incident.

The reduced cost of commercial-grade flash and hard drive memory meant the minimum period for retaining images before they are overwritten could be extended. This gave police and transport investigators sufficient time to access the camera recordings after a passenger complaint. The old systems held images for as little as two days.

2011 – The cost of new cameras was incorporated into an increase in taxi fares. There have been several successful prosecutions of driver offending, the most notable in 2013 when the passenger could not provide testimony.

2014 – The Department of Education and Child Development, including Families SA, introduced a contractual requirement for country taxis and hire cars. These are not regulated camera systems and differ on system elements.

Chauffeured vehicles and hire cars

1956 – The Metropolitan Taxi Cab Board was made responsible for issuing and administering chauffeured vehicle licences with a seating capacity of up to eight seats. Vehicles with more than an eight-seat capacity were licensed through the Office of Transport Policy and Planning under the *Road Traffic Act 1961*.

All chauffeured vehicles had to be pre-booked. Between 1956 and 1990 there was an average of 58 chauffeured vehicles operating under licence with up to eight seats

1980 – All pre-existing licences were able to do general for-hire work and 12 non-transferable wedding-only licences were issued. An additional five non-transferable licences were issued to a chauffeured vehicle company in 1984 to meet demand from tourists and business people.

1987 – Limits on the number of tour and charter coaches, regulated by the Office of Transport Policy and Planning, were removed which led to a mini-bus sector that challenged both hire cars taxis.

1988 – Chauffeured vehicles were approved to pick up passengers without pre-bookings in designated areas on New Year's Eve.

1989 – Restrictions on wedding-only licences were lifted to enable operators to undertake general for-hire work. A system of temporary wedding licences was introduced for vehicles to participate in weddings for two consecutive days without the need for a permanent licence.

1991 – Restrictions were lifted on the number of chauffeured vehicles, allowing open-entry to the hire car industry. The goodwill value of chauffeur vehicle licences, which were around \$30,000 each at the time, disappeared following the decision. It meant small passenger vehicles (SPVs) could compete with taxis for pre-booked services, but only taxis could undertake rank and hail services.

1994 – Under the *Passenger Transport Act 1994* licences for chauffeured vehicles were replaced by an accreditation system, and both hire cars and mini-buses were brought under a single regulatory authority. SPVs were defined as vehicles designed to carry 12 or fewer persons.

(In Queensland, New South Wales, the Australian Capital Territory and Victoria the hire car sector is subject to either numerical limits and hire car licences have a tradable value. This is not the case in Tasmania, Western Australia or South Australia.)

The legislative framework governing SPVs is designed to ensure that hire cars compete fairly with taxis as the taxi sector is burdened by high entry cost. All states prevent hire cars from plying for hire in the streets or portraying themselves as taxis. As a result, hire cars are generally not permitted to:

- be called taxis, or to be advertised as a taxi service;
- use designated taxi stands;
- ply for hire in the streets;
- use a taxi-meter.

In South Australia it is also a requirement for operators of SPVs to produce a business plan and display a 'not-for-hire' sign when not carrying passengers.

Uber Black

On 10 December 2014, the Minister for Transport approved Uber Australia as a booking office for third-party accredited SPV services. This allows accredited hire car operators to use Uber Black as a booking service.

Accredited operators that use or contract as Uber partners must obtain Ministerial approval under regulation 154 of the Passenger Transport Regulations 2009 to use Uber Black as a booking office.

Small Passenger Vehicles

Small passenger vehicles (12 or less seats) in both the metropolitan and traditional vehicle categories are required to be of a luxury standard, which has, to date, been determined as a higher quality class of vehicle, which exceeds that of a taxi.

Traditional vehicles (TVs) are intended to undertake “traditional limousine” type work, including weddings, funerals, formals and special occasion chauffeur services. TVs have a 15-year maximum vehicle age but are limited to 40, 000 kms per annum (to a maximum of 320, 000 kms over their life) and a minimum fare of \$20. TVs are inspected once annually.

Metropolitan vehicles (MVs) may undertake on demand or taxi type pre-booked services, cannot exceed a maximum of 6.5 years of age but do not have kilometre or minimum fare limits. MVs are inspected twice in a 12-month period.

The fees applicable are prescribed under Schedule 1 of the Passenger Transport Regulations 2009 and include an application fee for operator accreditation of \$425 per annum in addition to a fee for each vehicle that will be used under the operator accreditation. MVs pay a higher annual vehicle fee to the Department of \$1,912 per vehicle compared to TV fees of \$85 per vehicle.

Special purpose vehicles fall into four sub-categories:

SV1: off-road vehicles

SV2: motor cycles

SV3: classic, veteran and vintage (CVV) vehicles

SV4: novelty vehicles.

The Special purpose category is for a limited plan of operation that reflects the vehicle type as an integral component of the service. For example classic vehicles would generally be intended for weddings or special occasions where the passengers are seeking an experience or image of being associated with a particular service. This category is limited to a minimum pre booked fare of \$20 and the kilometres to be travelled both per annum (40,000) and overall (320,000). 4WD and Motor Cycles have a longer age year limit of 15 years compared to 6.5 years for other SV vehicles.

Non metropolitan vehicles (NV) operate outside the metropolitan area and can be operated until the vehicle is 15 years of age. The vehicle must have a minimum seating capacity (4 passengers, plus the driver), a minimum engine capacity (6 cylinders) and be air-conditioned. NVs are inspected annually.

Country taxi vehicles (CTs) operate in areas outside Metropolitan Adelaide⁷ which are not currently regulated by the relevant local council. CT vehicles have a 15-year minimum age limit.

Table 12: Small Passenger Vehicles

Small passenger vehicles	Approximate number of vehicles (June 2015)
MV	130
TV	200
SV	220
NV	155
CT	225

There are no numerical restrictions on entry into the hire car industry which means there is no scarcity licence value. Applicants for operator status are subject to medical and police checks and, when seeking accreditation for a vehicle, must provide a plan of operations to explain the proposed use of the vehicle, including financial estimates.

⁷ Metropolitan Adelaide is specifically defined in s 4(1) PTA as within the meaning of the *Development Act 1993*. The metropolitan area is bounded by Houghton and Bridgewater in the East, Willunga in the South and Gawler and Roseworthy townships in the North. It does not align to the metropolitan ticketing system for Adelaide Metro services which includes other areas of the Adelaide Hills or the area used for Compulsory Third Party premiums for commercial vehicles. Both of these include Mount Barker.

Applicants for driver accreditation are subject to police and medical checks, must sit a training course and are subject to tests measuring their ability to meet various aspects of the driving task.

All operators and drivers are subject to codes of practice that appear as schedules in the regulations. There is a code of practice specifically for SPV operators and applies to all drivers of passenger vehicles regulated under the Act.

Leasing of taxis

Under the legislation a taxi licence cannot be sub-leased by a lessee (Regulation 31(a)(iv) and S49). The licence owner can lease the licence to another party, but that party must operate the licence and cannot lease it to anyone else.

The licence holder or lessee must have operator accreditation. The licence owner, regardless of whether they operate the licence, has the same obligations as an operator.

Formal lease arrangements, coordinated through the TCSA, ensure that the taxi operator is responsible for all functions under the legislation. The licence holder or lessee is directly responsible for drivers using the taxi at all times.

A shift lease is not a lease in the context of the legislation but a description of the bailment agreement between the operator and driver in sharing income from the use of the taxi during a shift. This is in effect an alternative to traditional bailment arrangements (e.g. 50/50 split) and provides for greater flexibility in sharing income taking into account the potential value of shift income, while providing an incentive for drivers to operate lower income shifts. Drivers can have bailment arrangements for multiple shifts but cannot engage other drivers.

The operator cannot delegate operator accreditation to a shift lessee. Shift lessees have no operator responsibility for the vehicle which remains with the lessee or the licence holder.

There are currently 89 owner operators who operate their own licence and a number of multiple licence owners who lease the licence to multiple lessees.

Table 13: Multiple Taxi Licence Statistics

Number of licences	Number of lessees
2 - 10	53
11 - 20	6
21 - 30	3
31 - 40	2
41 - 50	3
51 - 60	0
61 - 70	2
Over 70	1

Cabcharge Australia Ltd has 44 general licences and is the largest single owner.

Taxi licence values

Entry to the Adelaide taxi sector is restricted through a licensing system, which is first sold through tender by the government and can be transferred or sold in the market. The current value of general taxi licences is approximately \$230,000 – \$250,000 a decrease from \$375,000 four years ago. Access taxis are valued at approximately half the value of a general licence.

Taxi licences have been sold by the government since 2007/08 and budget forward estimates include annual licence sales as an ongoing revenue target.

Table 14: Tender Outcomes for General Licences

Financial year	2010/11	2011/12	2012/13	2013/14	2014/15
Total value of licences sold	\$7,230,345	\$8,087,620	\$7,715,210	\$4,094,030	\$3,967,223
Average price	\$377,213	\$372,291	\$344,761	\$326,953	\$305,171
Number of licences tendered	18	20	22 (20 taken up)	15	13 (12 taken up)

Table 15: Tender Outcomes for Access Licences

Financial year	2010/11	2011/12	2012/13	2013/14	2014/15
Total value of licences sold	\$894,549	\$374,001			\$287,560.00
Average price	\$93,250	\$133,824			\$143,780.00
Number of licences tendered	7	3	0	0	2

Table 16: Accreditation fee revenue

Financial year	2012/13	2013/14	2014/15
Driver accreditation fees	\$471,786	\$442,318	\$467,458
Estimated taxi and hire car operator accreditation fees	\$747,000	\$697,000	\$769,000

Complaints and commendations

DPTI provides information on the number of complaints and commendations it has received regarding taxis and chauffeur vehicles. Complaints may lead to disciplinary action if there is a breach of the regulations under the *Act*. In 2014/15 taxi complaints represented less than 0.01% of the estimated eight million journeys provided. Both complaints and commendations have been steadily decreasing each year.

Table 17: Feedback on taxis and chauffeured vehicles

	2009-10	2010/11	2011/12	2012/13	2013/14	2014/15
Commendations	26	17	8	7	4	4
Complaints	1386	1086	771	639	559	502

Compliance resources

DPTI has four dedicated passenger transport compliance officers – usually two on day shift and two on night shift. There is no regional on-road passenger transport compliance work undertaken.

There are approximately 100 sworn Transit Police Officers engaged in enforcement within the public transport sector but in practice are excluded from the taxi and chauffeured vehicle sector except for serious criminal offences.

Authorised inspection stations

Periods of inspection for taxis and small passenger vehicles are prescribed under regulation 138 of the Passenger Transport Regulations 2009. Taxis and small passenger vehicles metropolitan (SPV Metro) must be inspected six monthly and all other small passenger vehicles (SPV non-metro, SPV traditional and SPV special purpose), together with country taxis, are required to be inspected annually.

On 11 August 2010 the Minister for Transport entered into a deed of approval with the Royal Automobile Association and Rightway Automotive Services Pty Ltd to conduct inspections of taxis and SPVs for roadworthiness and compliance with passenger comfort standards.

Vehicle inspectors employed by authorised inspection stations are responsible for inspecting, issuing vehicle inspection certificates and clearing defect notices on public passenger vehicles issued under the *Passenger Transport Act 1994* (PTA) and the *Road Traffic Act 1961* (RTA).

Vehicle inspectors are accredited as approved vehicle inspectors under Section 53 of the PTA and appointed as authorised officers under section 35 of the RTA by the Minister.

Inspections are undertaken in accordance with the Vehicle Inspection Standards Guidelines issued by DPTI.

Investigations into the authorised inspection station scheme has revealed that while the department does undertake some auditing of the authorised inspection stations, it is administrative in nature and does not audit the actual inspection, such as equipment used, inspection processes etc.

Driver training

Training for drivers is provided through two recognised training organisations (RTO's) under approval from DPTI. Up until September 2015 the two RTOs were the Taxi Cab Training Centre (TCTC) of the Access Training Centre and the Transport Training Centre.

When the Transport Training Centre ceased operations in September, TCSA was made an interim driver training provider as it was already an approved RTO for taxi operator training. All trainers from the RTOs have Certificate IV Training and Assessment qualifications.

The TCSA is a non-profit organisation while TCTC is for profit. Both organisations have been criticised for being too closely associated and controlled by the taxi industry.

Table 19: Chauffeur Driver Training Fees – Current Fees (as at November 2015) for the two providers

	TCTC	Taxi Council SA
English and road law assessment	\$60	\$50
Driving assessment	\$120	\$100
Half-day course	\$195	\$150
Total	\$375	\$300

Table 20: Taxi Driver Training Fees – Current Fees (as at November 2015) for the two providers

	TCTC	Taxi Council SA
English and road law assessment	\$60	\$50
Driving assessment	\$120	\$100
Five day course	\$695	\$450
Final assessment	\$110	\$100
Total	\$985	\$700

National competencies for taxi driver training were independently developed by the Transport and Logistics Industry Skills Council in consultation with the taxi industry and government regulators. They were approved by transport ministers at the Australian Transport Council in November 2009 and full delivery of the units began in August 2011, including enhanced English language proficiency skills.

Chauffeured vehicle drivers receive a half-day course primarily on regulatory responsibilities, as well as English language, road law and in-vehicle driving assessment.

Taxi driver training is a more extensive five-day course and consists of four days in the classroom and one day of practical training including driving a taxi and operating equipment. It is followed by 384 hours of on-road training and two professional development modules. The course includes nine national competency units which are part of Certificate II in driving operations TLI21210 (Appendix).

TCSA owns the overall driver training course delivered by the two RTOs and they in turn own the specific curriculum. The national training units are aligned to mutual recognition standards so that taxi driver accreditation is recognised and transferable around Australia.

Training courses, materials and the RTOs are accredited and audited by the Australian Skills Quality Authority (ASQA). The national competencies were reviewed in 2014/15 by the Transport and Logistics Industry Skills Council.

All states and territories have adopted the English language proficiency and all use the national competency units for training, with the exception of Victoria which moved to its own Knowledge of Melbourne in 2012. Unlike the Knowledge of Adelaide, which only assesses knowledge of locations, such as landmarks, major roads and destinations, the Knowledge of Melbourne includes other aspects of taxi driver training. Victorian taxi drivers are assessed against the national competencies in the Knowledge of Melbourne assessment.

The Knowledge of Adelaide requires a pass mark of at least 80% and since the system was introduced in 2010, 89% of candidates have graduated. The remaining 11% were not considered suitable for taxi driving as they did not reach the basic entry requirement.

The English language assessment is validated against the International Second Language Proficiency Rating (ISLPR) scale 3. There are five separate tasks and the applicant must score a minimum of three for each task to achieve an overall minimum score of 15 to obtain competency. The 5 tasks are:

- follow verbal instructions;
- explain a situation;
- reading and comprehension;
- complete a form;
- simple numeracy.

All taxi driver candidates are required to successfully complete the English assessment interview prior to commencing formal training.

The national competency units relevant to the taxi industry

TLIB2090	Use communication systems in a taxicab
TLIC2009	Drive taxi
TLIC2040	Provide wheelchair accessible taxi services to passengers with disabilities
TLIF2072	Comply with safety and security procedures
TLIH3004	Identify major roads, services and attractions
TLII2019	Provide taxicab customer service
TLIC3011	Transport passengers with disabilities.
TLIL2060	Complete induction to the transport industry
TLIP203	Carry out financial transactions and maintain records

An additional unit, TLIF1001, is also provided for work, health and safety procedures, which includes fatigue management.

There is no unit which specifically addresses tourism.

Training reform

Country taxi drivers may be accredited either as small passenger vehicle drivers or taxi drivers. They undertake training for the relevant category in which they hold accreditation.

The process involves drivers attending a centralised booking service for information, the TCSA for information kits and assessments and an RTO for training at various stages.

For operators, only taxi operators are required to complete a training course. New operators must complete an accredited course provided by the TCSA prior to applying for operator accreditation from DPTI. The course, Monitor and Manage Small Business Operations, provides operators with the standards required to operate a taxi under the *Passenger Transport Act* and regulations.

Wheelchair accessible taxis

Wheelchair accessible taxi services, known as access taxis, were previously reviewed in *Assessment of the Access Cabs System*, (Kowalick, 2001) (Appendix).

In Adelaide, wheelchair accessible taxis have specific licences – general licences with special conditions. These conditions state that access taxis must operate through a single government-nominated CBS and can only do wheelchair hiring between 7.30am and 6.30pm, unless rostered off.

Priority has to be given to wheelchair hiring at all other times and the taxis must be constantly linked to the nominated wheelchair accessible taxi CBS even if work is undertaken for another fleet outside of those dedicated hours. On days of maximum effort – Christmas day, mother's day and other specified times – all access taxis must operate in the wheelchair accessible taxi fleet for specified hours.

Only ACT has a similar performance-based system which it adopted after reviewing wheelchair accessible taxi services across Australia. Other jurisdictions require all taxi companies to have wheelchair accessible taxis as part of their fleets.

In September 2011, DPTI awarded a five-year contract to Adelaide Access Taxis for the provision of a centralised booking service for the dispatching, monitoring and management of accessible taxi services in metropolitan Adelaide. Adelaide Access Taxis is part of Adelaide Independent Taxis, which held the contract for the previous five-year period. Prior to that, Yellow Cabs held the contract.

Access taxi licences have increased from 69 in 2006/07 to the present fleet of 102 taxis, an increase of 47.83%. Access taxis comprise approximately 9% of the total taxi fleet in the Adelaide metropolitan area compared to 12% Australia-wide.

For the 2014/15 period there were 100 general taxi licenses with special conditions for access taxis.

Access taxi waiting times

The Disability Standards for Accessible Public Transport (DSAPT) under the *Commonwealth Disability Discrimination Act 1992* require that response times for wheelchair accessible taxis is equivalent to general taxis.

DPTI reports there is no agreed or national method for reporting response times in taxis or for comparing general taxis with access taxis, as taxi regulation differs in each state and territory of Australia.

However, taxi companies can now accurately collect data on taxi response times based on GPS and other sources. In South Australia access taxis comply with the DSAPT standard, depending on which measure or comparison is used.

In 2014/15 the average waiting time for access taxis was equivalent to general taxis – 8.5 minutes during the day (6am to 6pm), which is less than the 8.97 minutes for general taxis. Between 6pm and 6am the average waiting time for access taxis was 10 minutes – 0.08 minutes longer than the average time of 9.52 minutes for general taxis. For the 2014/15 financial year:

- 79.52% of access taxi passengers were picked up within 10 minutes, a minor increase compared to 78.89% in 2013/14
- 87.93% of access taxi passengers were picked up within 15 minutes, a minor increase compared to 87.41% in 2013/14
- 98.00% of access taxi passengers were picked up within 30 minutes, a minor increase compared to 97.92% in 2013/14.

(These figures do not include work undertaken under contract to the Department of Education and Child Development or the Department of Veterans' Affairs.)

Performance statistics do not detail the entire customer experience for access taxi users. Comments to the review panel from people with a disability indicate they tend to avoid booking access taxis during peak times when taxis are undertaking regular bookings for school and work-related trips.

In addition, when access taxis are late it can have a significant impact for people with a disability in areas such as carer availability and appointments with health professionals or other services. It also raises issues such as waiting in locations exposed to the weather and limited opportunities for hiring alternative transport.

In addition to licence conditions and a single CBS arrangement, response times have been supported by two other initiatives – multi-seat work for access taxis and an on-time bonus.

Multi-seat tariffs were introduced in 2009 primarily in response to changes in sedan design. It enabled access taxis with capacity to carry five or more passengers to undertake requests for hire outside of dedicated hours or when rostered off.

Prior to this, there were very few wheelchair accessible taxis available outside of dedicated hours. On some nights, drivers would need to be specifically rostered to ensure at least one access taxi was available after hours. Today access taxis can operate over 24 hours in their capacity as multi-seat taxis but can also be requested for wheelchair accessible work.

Feedback from people with disability indicates that when an access taxi arrives outside of dedicated hours it is often set up as a multi-seat taxi. They must then wait while the driver removes the seats to make way for their mobility devices, sometimes charging the passenger waiting time rates.

On-time bonus scheme

The on-time bonus scheme was introduced in 2002 as an incentive payment for access taxi drivers to pick up bookings within an equivalent response time to general taxis. The annual expenditure for the scheme is approximately \$989,000 (GST inclusive).

Under the scheme, access taxis and the Adelaide Access Taxis CBS have specific performance requirements and receive an on-time bonus payment for pickups within specified periods of booked times. The trip must involve the use of an SA Taxi Subsidy Scheme (SATSS) voucher (see section below) with a booking number from Adelaide Access Taxis.

The scheme pays \$5 to drivers and \$0.50 to the CBS for bookings that are met in less than 31 minutes of the booked time. For jobs made within 13 minutes of the booked time the CBS receives \$1 and drivers still receive the \$5 payment. Where services that do not meet the targeted pick up time of 30 minutes and 59 seconds after the agreed booking time, the CBS incurs a defective service penalty, dependent on the waiting time incurred. These sanctions are applied as deductions to the CBS's monthly contract payment.

Access taxi driver's states that the on-time bonus has not increased since it was introduced and have requested a lifting fee, similar to other jurisdiction (Appendix), to cover time assisting passengers to board or alight the vehicle. It is not specified in the request as to whether this should replace the on-time bonus or is in addition to.

There are issues with a lifting fee:

- Compared to the on-time bonus, lifting fees are not performance based and are paid regardless of a late pick-up.
- At present, SATSS allows the waiting time to cover assisting passengers to alight and board vehicles. A lifting fee would therefore need to replace this allowance.
- For a lifting fee, the meter should not be activated until the passenger is seated in the vehicle with the seatbelt applied and the driver has been informed of the destination. There is the potential for a double payment if the meter is activated prior to this. Meters can be programmed to only activate when vehicle is moving.
- Essentially a lifting fee is a minimum fare or flagfall for passengers in mobility devices which is paid by the government. A lifting fee that is applied to people who pay for a taxi from their own pocket could be considered discriminatory.

South Australian Transport Subsidy Scheme

The South Australian Transport Subsidy Scheme (SATSS) was established in 1987 to provide taxi transport assistance to people with a mobility disability. Permanent residents of South Australia who have severe and permanent disabilities which limit their capacity to use public transport independently are eligible to apply for membership.

There has been a slight growth in membership each year; however this is partially offset by members who pass away.

SATSS is used exclusively in metropolitan Adelaide by taxis which have a scheduled maximum fare that is auditable through meter and booking records, and have specific standards associated with the federal *Disability Discrimination Act 1992*. In country areas, chauffeured vehicles can accept SATSS where there are no country taxis.

Over one million trips a year are subsidised for members.

The scheme provides members a maximum of one book of 80 personalised vouchers every six months for subsidised taxi travel with a maximum fare limit of \$40 per voucher. The vouchers are not limited by time but members cannot re-order a new book earlier than six months from the date of issue of the previous book. There are two categories of membership, one for those who are ambulant and one for those who are confined to wheelchairs. Ambulant members receive a 50% subsidy and wheelchair members receive 75%.

Country members are able to use up to three vouchers per trip to assist with long distance travel in regional areas.

In general, people who receive a 75% subsidy and have a large mobility device, use access taxis, while other members use general taxis. This is not a hard and fast rule as some people with foldable manual wheelchairs may also use general taxis.

The scheme is not intended to meet all of a person's transport needs. There are two additional schemes available for wheelchair members receiving the 75% subsidy – the Journey to Work Scheme (JTWS) and Tertiary Education Assistance Scheme (TEAS).

JTWS provides additional vouchers for members who undertake paid or voluntary work with a subsidy of 75% up to a fare limit of \$40 for travel to and from prescribed employment locations.

TEAS provides additional vouchers for members who undertake tertiary education with a subsidy of 100% up to a fare limit of \$40 for travel to and from their nominated educational institution.

DPTI also administers the Plus One Companion Card which allows a companion to accompany the SATSS member on all Adelaide Metro services for free, providing the member has a valid Metroticket. This scheme is also subject to eligibility criteria relating to the need for a carer or companion.

The eligibility criteria for SATSS changed in 2006 when it was broadened from being diagnostically based and only focused on physical disability. The scheme now focuses on a person's individual functional capacity to use mass public transport and not on diagnosis or specific conditions. Also in 2006, the SATSS allowance was increased from 60 to the current 80 vouchers every six months, and the subsidy rose from a maximum \$30 fare to \$40.

Applications for SATSS are completed in conjunction with an applicant's medical practitioner and health professional. All applications are reviewed by an independent health professional and assessed against eligibility criteria which includes:

- evidence of a person's inability to use public transport independently;
- the effect of a combination of impairments on an individual's abilities;
- the appropriateness of SATSS to provide transport assistance;
- personal safety issues from the individual, transport provider and general public perspective;
- total and permanent dependence on a wheelchair;
- severe permanent inability to negotiate three bus steps 350mm high;
- permanent inability to use their arms to assist balance and safety when using public transport;
- unable to walk for more than 100 metres without brief rests;
- sensory impairments, including vision;
- cognitive and intellectual impairment;
- communication impairments.

Those not eligible for SATSS include people:

- who have an impairment that is temporary or treatable;
- with challenging behaviours which places themselves, a driver or another passenger at risk, including the risk of absconding from vehicles and behaviours that may distract a driver while operating a vehicle or result in the person being evicted from the taxi in an unfamiliar area putting them at risk;
- who are legally blind and are able to travel independently at all times on public transport.

Minor behaviours that can be managed form part of these considerations, however do not necessarily exclude an applicant from the scheme. SATSS does not mandate that applicants must travel with a carer and therefore behaviours that can only be managed by a carer will result in applicants not meeting the safety considerations as part of the eligibility assessment.

Taxi drivers are able to assist passengers to some degree, however they are not carers. Their primary role is to provide safe transport, so if a passenger is unable to take or provide instruction significant duty of care issues arise.

Specific mobility criteria are not publicly available and the application forms are designed to elicit information about the person's conditions and mobility rather than ask whether they meet criteria. This is to guard against questions being answered in such a way to ensure the applicant meets the criteria.

SATSS budget

There are currently 70,173 SATSS members of which 61,503 receive 50% subsidies and 8,670 receive 75% subsidies. Of this total, 26,733 members are classed as 'active', having used a voucher within the last nine months. This data was current at November 2015 so does not include a Christmas Day when members who do not travel at other times of the year may travel in a taxi. In April 2015, 37,076 members were classed as active.

The total SATSS budget for the current year is \$10.88 million, which includes administrative costs of \$640,000. The budget for JTWS is \$400,000 with 74 active members, and the budget for TEAS is \$38,000 which had 10 members during the 2015 academic year.

During 2014/15, 977,774 trips were taken by SATSS members to the value of \$10.5 million in subsidies paid.

On average there are around 400 new members with approximately 150 members notified as deceased per month.

New applicants who are in the eligible age groups for the National Disability Insurance Scheme are referred to the National Disability Insurance Agency in the first instance.

SATSS and National Disability Insurance Agency

When SATSS was first introduced the disability sector provided a range of direct transport services through various agencies. This is reflected in the Act and regulations which specifically exclude some disability services. Over time, disability transport services provided by agencies have been reduced and funding from the disability sector for transport has not been transferred to the transport portfolio.

SATSS is considered to be 'in-scope' for the National Disability Insurance Scheme (NDIS). Approval has been obtained to change the SATSS contribution from 'in-kind' to a cash contribution. That is, funding from SATSS for NDIS eligible members is being transferred to the National Disability Insurance Agency (NDIA).

The eligibility criteria and application form have been updated to reflect that those who have been assessed as eligible for support through NDIA are not eligible for SATSS.

The intention of NDIS is that there will be greater control and flexibility for the use of these funds by individuals. NDIA will include transport where required in a person's assistance plan which applies to those from birth to 64 years.

To date, South Australia has been an NDIS trial site for children with disability. SATSS members under 18 have been transferred to the NDIA in age cohorts. It is intended that 15 to 17 year olds will be transferred in 2016/17 and then a geographical approach to the transfer of adults may be implemented from 2017/18.

Only 10 children were transitioned initially, although there will be as many as 5,597 members with funding of approximately \$2 million to be transitioned in the next phase.

The State Government will retain responsibility for members that are not eligible for the NDIS. Current figures indicate that almost 83% of current SATSS members are aged 65 years and over. Accordingly, the impact on membership numbers and therefore costs will not be significant.

As the future scope of NDIS becomes more certain, and as mass public transport becomes fully accessible, it may be appropriate to review SATSS and its eligibility criteria at that time.

Access taxis and the ageing population

According to the Australian Bureau of Statistics *Survey of Disability, Ageing and Carers 2012*, South Australia has the second highest rate of disability in Australia. More than 21.5% of South Australians – 357,100 people – have a disability and of these 32% – 114,300 people – have a profound or severe restriction in core activities, including mobility. In 2012, 79,000 South Australians reported needing assistance with transport, an increase of 8.7% from 2009. Over the same period the number of South Australians who used a mobility aid, including walking frames, wheelchairs and scooters, increased by 12% to 58,900 people.

The *ABS Population Projections, Australia, 2012* for South Australia identifies the peak of the baby-boomer cohort at 50-54 years of age. Early-born baby boomers are now in their 60s and may not require significant disability services within the Budget Forward Estimates period.

For Australia as a whole, the proportion of people aged 65 to 74 years of age is projected to grow from 7% of the population in 2007 to 9.5% by 2017 and those aged 75 to 84 years from 4.7% to 5% of the population in the same period. Eighty-five year olds and over will comprise 2.2% of the population by 2017, up from 1.7%.

Despite these changes, ageing and disability population increases do not necessarily have a direct correlation with the use of access taxis. For example, while the membership of SATSS is increasing, the number of active members, those who used at least one voucher in the preceding nine-month period, remains fairly stable. As at October 2012, there were 3,759 active members in receipt of the 75% wheelchair subsidy compared to 3283 in October 2015.

The access taxi fleet has reached the point where the number of jobs per vehicle has decreased as new licences have been released. There were 7.3 jobs per day per access taxi with a 90-car fleet in 2010, compared with 5.11 jobs per day with a 102-car fleet in 2015.

Table 21: Access Taxi Jobs

Calendar year	Despatched	Despatched jobs per taxi per day
2010	240,747	7.3
2011	246,470	7.33
2012	242,235	6.7
2013	230,957	6.33
2014	230,176	6.31
2015 (10 months only)	187,370	5.11

Future challenges with access taxi licences

Access taxis require private individuals to pay for a licence through tender or private transfer/sale, approximately \$125,000 to \$155,000, and purchase and modify a vehicle at a cost of about \$70,000. They also have special conditions placed on their licence which limits their opportunity to income derived primarily through wheelchair work for around 50% of the time.

Changes to the funding of disability services through NDIS will result in the 'cashing out' of SATSS for NDIS eligible people. They may elect not to use access taxis and instead spend their allocation on other forms of transport. As mass public transport vehicles increase in accessibility the demand for access taxis and SATSS may diminish over time. As such, access taxi licences should be reviewed within the changing environment rather than released as a set amount each financial year without reference to demand.

Risk minimisation

SATSS is managed by DPTI as part of the Public Transport Planning and Operations section. Support is also provided by staff from the Risk and Assurance section, who investigate incidents of misuse and fraud either by taxi drivers and operators as well as members. Significant matters are referred to the Passenger Transport Standards Committee with a few also referred to the courts.

Through risk minimisation strategies, including the strict application of eligibility criteria, regular usage audits and reviews and investigations, the current SATSS expenditure is the lowest it has been since 2007/08.

South Australia uses paper voucher system together with a photographic ID card for members. Such a system is open to deliberate and accidental mistakes because it relies on drivers and passengers accurately completing the voucher. While the data entry systems contracted by DPTI reject or highlight vouchers where information does not match (e.g. booking numbers) or is outside certain parameters, vouchers can still be intentionally falsified.

Other jurisdictions in Australia have or are investigating smartcard systems for managing taxi subsidy schemes Smart electronic payment systems can assist with monitoring fraud.

To date the only option for a smart system has been the Cabcharge smartcard. New technology for payment and booking systems have the potential for other providers to be considered and compared.

Taxi cost index

The maximum fare charged by taxi drivers is regulated under Schedule 3 of the Passenger Transport Regulations 2009.

In the late 1990s, the then Passenger Transport Board engaged an independent consultant (Booz Allen Hamilton Australia Limited) to monitor taxi industry costs in South Australia. Booz Allen Hamilton had previously been involved with the development of taxi and bus cost indices for interstate government authorities, including Western Australia, Queensland and Victoria. A taxi cost index (TCI) was developed for the department to assess taxi fare increases in collaboration with the former Taxi Industry Advisory Panel.

The TCI is used to assist with applications for fare increases from the taxi industry and measures the average cost of providing a typical taxi service per vehicle over the period under consideration. It measures movements in taxi operating costs, including LPG fuel prices, insurance, repairs, maintenance, parts, tyres, vehicle capital charges and government charges. The fares are generally increased annually in accordance with cost increases incurred since the previous fare increase.

The taxi fare review process currently involves the TCSA, on behalf of metropolitan taxi owners and operators, contacting DPTI to seek a fare increase. In response, DPTI reviews movements in the TCI over the relevant period and this information is referred for independent verification.

Advice regarding movement in the TCI is relayed to the TCSA which formally applies to increase taxi fares in line with the agreed overall change in costs. The TCSA currently determines how any increase is applied to the fares, i.e. the allocation to flagfall, distance rate and waiting time.

Following this process, DPTI prepares a Cabinet submission endorsing the requested fare increase. The submission involves consultation with various government agencies, such as the Department of Treasury and Finance (costing comment), Department for Education and Child Development (expenditure impacts incurred in the provision of taxi services to children with a disability) and the Department of Communities and Social Inclusion (family, community and social impacts).

Due to the lengthy process involved in considering and scheduling fares, the taxi industry is generally six months behind in real costs in the implementation of a fare rise.

DPTI is supportive of an independent economic regulatory body, such as the Essential Services Commission of South Australia (ESCOSA), assessing future claims for taxi fare increases in consultation with DPTI. There are benefits to limiting the involvement of DPTI in reviewing and determining fare levels for taxis, particularly in regard to perceptions of potential bias.

Fare tariff structure for metropolitan taxis

South Australia has a four tariff fare structure:

- Tariff one applies for taxis hired between 6am and 7pm Monday to Friday.
- Tariff two applies to taxis hired between 7pm and 6am Monday to Friday and on weekends and public holidays.
- Tariff three is for more than four passengers (six people including the driver) and covers the same period as Tariff one.
- Tariff four is for more than four passengers (six people including the driver) and covers the same period as Tariff four.

Multi-seat tariffs

The proposed introduction of multi-seat tariffs will encourage the industry to offer better value for money for passengers. Groups consisting of five or more people will be able to book one vehicle rather than two, thereby reducing the cost of the trip.

Multi-seat tariffs are based on cost differences identified between a multi-seat taxi van and a standard four-passenger taxi. To ensure comparability of costs, assumptions underlying the TCI were used to derive a relative cost model.

A 30% fare increase for multi-seat vehicles has been suggested. This takes into consideration the expectation that multi-seat taxi vans will be carrying five or more passengers 40% of the time, and that the expectation of higher than usual distances travelled without passengers for which they receive no remuneration.

The department has reviewed the cost structures of operating a standard taxi and multi-seat van, and validates that the 30% price difference is justified.

To avoid confusion by the public and possible incorrect application of the multi-seat tariffs, the following conditions must be met:

- Meters with multi-seat tariffs are only approved for taxis that can seat five or more people.
- Signage must be placed inside the taxi advising passengers when entering a vehicle of multi-seat rates.
- A printed receipt from the meter indicating the tariff must be provided to the passenger who has hired the taxi.
- Multi-hiring, where individuals share a taxi to different destinations and pay a percentage of the metered fare at each drop-off, cannot apply to multi-seat tariffs. Multi-hiring is for separate hirings of a single vehicle.

SATSS may be used for multi-seat tariffs but is not intended to subsidise taxi travel for non-SATSS members. It is expected that other individuals who travel on a multi-seat tariff should contribute to the full cost of the fare. The SATSS member's usual level of subsidy would apply, which in this case would be 50% or 75% of their share of the fare to a maximum of \$40.

New technologies

There have been significant advances in technology since 2006 when the public transport regulations were amended to introduce PINs for driver log-in to taxi booking systems and continuous GPS tracking of vehicles. Smart handheld devices such as the iPhone (2007), iPad (2010) and other tablet computers and phones have been introduced and refined.

The development of software applications (apps) for these products started to become available through app stores in 2008 and together with other new technologies they have the potential to transform the transport sector.

Mobile apps enable people with smartphones to request and often pay for transport via the phone app. The request is either directed to a taxi driver, chauffeur vehicle driver or a private individual depending on the model of service.

The best known of these is Uber, which offers several service options to customers, including their ridesharing service known as UberX in Australia, where drivers use their own private cars. In these service models, vehicle, service and driver standards are determined and checked by the app booking company, unless otherwise specified.

Since Uber's launch in 2009 in the US, other companies have developed app-based booking and payment systems, including traditional taxi companies or centralised booking services.

South Australian legislation presently holds the operator of a chauffeur vehicle service responsible for the booking and booking information regardless of whether it is through a third party provider. Bookings for taxis can only be made through an accredited CBS, which provides a range of services including driver safety and fleet support.

New vehicle safety systems are being developed for vehicles including:

- Vehicle-to-pedestrian communication systems, which enable a vehicle to transmit a warning to a pedestrian's mobile phone or warns the driver, by sensing a pedestrian's phone, of a person about to cross their path.
- Predictive forward and rear collision warnings and adaptive cruise control sensors to scan the road for hazards and warn the driver through audible, visual or physical (e.g. seatbelt tightening) means. Hazards include those that might otherwise be obscured from the driver. Systems may also initiate braking and collision avoidance by the vehicle.
- Lane departure warning systems and lane change assist which employ sensors, such as cameras or lasers, to detect the vehicle's position in the lane and either warn or automatically adjust the steering to avoid drifting and potential collision.
- Automatic collision notification systems that transmit information from the vehicle to emergency and other services in the event of an accident, including location and severity of damage.
- Ghost car GPS navigation which projects a 'ghost car' onto the vehicle windscreen for the driver to follow, allowing drivers to keep their view on the road while receiving navigational assistance information.
- Night vision which uses infrared sensors and cameras to detect warm objects ahead of the vehicle and display these onto a monitor screen or onto the windscreen.
- Alcohol and seatbelt interlocks to disable vehicles where drivers fail to meet assessment criteria.

These systems were featured in RAA's *SAMotor* magazine (Winter 2015) and RACV's Emerging Vehicle Safety Technology (December 2014).

It is now feasible to connect mobile devices to a car's automated systems so that booking, despatch, payment and other systems can interact with the vehicle as well as the driver and passenger. It is also possible that in future navigation, despatch, fares and other information can be projected onto the driver windscreen.

Driverless cars

Driverless cars have the ability to revolutionise transport in Australia with the technology promising to not only improve safety but reduce congestion and lower emissions. It's predicted that within 15 years, the international driverless car industry will be worth \$90 billion. Driverless car trials took place on the Southern Expressway in Adelaide on 7-8 November 2015.

Almost all major car manufacturers are working on driverless cars, including General Motors, BMW, Audi, Ford, Mercedes, Renault and tech giant Google.

The *Act* already includes the carriage of passengers by an automated, or semi-automated, vehicular system.

8. Summary of Findings

The Panel's recommendations were greatly assisted by the information and feedback provided throughout the extensive consultation period.

In addition to stakeholder meetings and written submissions, the review panel was provided with demonstrations of mobile phone and tablet-based technology, which includes biometric log-in checks for drivers involving facial recognition.

Community feedback

A public survey was conducted as part of the review to obtain community feedback on the taxi and chauffeured vehicle sector. The survey could be accessed online and via a QR code in all taxis and some chauffeured vehicles, and resulted in 2,226 responses.

Results from the survey can be viewed in the Appendices. Analysis of the feedback identified that the community considers the following important:

- tracking of the vehicle
- safety cameras that continually record
- signage or number plates to make the vehicle easily identifiable from the street
- identification of the driver to be clearly displayed.

Among the proposals, two received overwhelmingly positive responses:

- the Government should be able to automatically suspend someone charged with a serious criminal offence, such as rape or assault – 1,683 in favour
- taxi drivers must take a person regardless of distance and therefore cannot refuse short trips – 1671 in favour.

Respondents also indicated they:

- do not want to pay more for point-to-point transport during periods of peak demand
- do not agree with people being able to jump the queue if they are prepared to pay more for the service
- do not want to pay extra for guaranteed on-time pick up
- are happy to share the vehicle with unknown passengers
- would like the option to choose smaller no frills vehicles.

Taxis

While many taxi drivers provide an excellent service there were a number of issues that were repeatedly raised throughout the consultation process including:

- drivers using mobile phones
- poor hygiene and presentation
- lack of tourism knowledge and assistance
- not helpful
- lack of knowledge
- cultural issues and attitudes towards women
- incorrect charging of metered fares.

While complaints to the department have been steadily declining, it appears that either the perception versus the actual quality of service provided is distorted or customers have no faith in the current complaints process.

There were various other recurring comments from the public and customers. They don't like waiting in periods of extreme peak demand and want:

- greater choice, flexibility and the ability to provide instant feedback

- greater control over when the vehicle will arrive
- convenience of new technology
- the option of paying upfront
- to know how far away the taxi is
- the ability for the transaction to be cashless.

Chauffeured vehicles

There was no public or community concerns raised about the chauffeured vehicle industry. Matters flagged in relation to chauffeured vehicles are industry related and include the following:

- being recognised as an essential public transport service like taxis and receiving the same benefits, such as being able to use bus lanes
- not for hire sign requirement
- need for a level playing field
- range of vehicles.

The State Government has found it extremely difficult to apply vehicle regulations and standards with variations in vehicle production. There are a range of different quality vehicles from people movers through to luxury vehicles. There is a perception that a mid-range luxury vehicle is still better than a top of the range people mover. Top of the range is also difficult to stipulate when comparing varying standards for different makes and models of vehicles such as Mercedes versus Hyundai.

Written Submissions received

The review panel received over 200⁸ written submissions predominantly from people associated with the passenger transport industry. Following is a summary of the major issues raised in those submissions.

Taxis

- service standards – improve timeliness of pick-ups, cleanliness of vehicles and cleanliness, hygiene and politeness of drivers, and introduce driver uniforms
- fatigue management – introduce working hours and log-in restrictions
- cease the release of licences.

Chauffeured vehicles

- allow use of bus lanes
- provide more pick-up and drop-off zones
- remove need for not-for-hire signs.

Taxis and chauffeured vehicles

- Improve airport pick up and drop off system
- the sector is over-regulated
- ability to use EzyReg
- improve speed of driver screening
- new technology welcome
- need for level playing field in terms of fees and charges
- all vehicles should have GPS tracking
- government driver screening for all drivers.

The full range of issues and suggestions are attached in Appendix 3.

⁸ The Premier, Minister for Transport and Infrastructure and panel also received more than 4,000 automated pro forma emails developed by one company that wishes to enter into the point-to-point transport market.

9. References

Harper, P., Anderson, P., McClusky, S. and O'Bryan QC, M. (2015). *Competition Policy Review: Final Report*. [online] Australia. Available at: http://competitionpolicyreview.gov.au/files/2015/03/Competition-policy-review-report_online.pdf [Accessed 15 Jan. 2016].

Kowalick, I. (2001). *Assessment of the Access Cabs System*. Adelaide, pp.54-55.

Tlisc.org.au, (2016). *Transport & Logistics Industry Skills Council » Driving Operations*. [online] Available at: <http://tlisc.org.au/driving-operations/> [Accessed Nov. 2016].

10. Appendix

Stakeholder Meetings with the Panel

- Transport Training Centre
- Access Training Centre
- Adelaide Convention Centre
- 13 Cabs
- Adelaide Casino
- Adelaide Independent Taxis
- Adelaide Access Taxis
- Taxi Council of SA
- Taxi Council of SA CEO
- Suburban Taxi
- Country Taxis
- Chauffeured Vehicle Association
- Impressions
- Department of Planning, Transport and Infrastructure Compliance
- Uber
- Ingogo
- GoCatch
- MTData
- NetCABS
- Adelaide City Council
- Passenger Transport Standards Committee
- Adelaide Oval Stadium Management Authority
- Department for Health and Ageing
- Rightway Automotive Services
- Department for Communities and Social Inclusion
- Hughes Limousines
- Adelaide Airport Corporation
- South Australian Tourism Commission
- SAPOL
- Seniors and disability representatives
- Department for Education and Child Development

Summary of Issues Raised in Written Submissions

Safety

- Separate the driver from passengers in the vehicle
- Fatigue management – introduce working hours/log in restrictions
- Introduce biometric scanning
- Remove front passenger seat
- Allow upfront and cashless payment
- Introduce security screens
- Streamline police response
- All vehicles to have GPS tracking
- Passenger transport ID card for passengers

Improve services

- Jobs not covered in five minutes should go to nearest taxi (any company)
- Reduce maximum age of vehicles (general, access and multi-seat)
- Increase maximum age of vehicles
- More flexibility in types of vehicles for chauffeur industry
- Taxis should have bigger vehicles
- Driven taxi owners – drop in service quality
- Offer free WiFi in taxis
- Need booking system updated
- London Taxi/ New York taxi
- Taxis should use Tesla cars
- Drivers not to speak in own language when passenger in car
- Drivers must accept short fares/trips
- Drivers to have positive attitude
- On-time pick-up taxi
- Involve Chauffeured Vehicle Association in parking for hire cars at hotels, venues etc.
- CBSs should penalise rogue drivers
- Retain CBS's
- Have just one CBS
- Promote car pooling more instead of taxis, public transport etc.
- More access to bus lanes for taxis
- Hire cars to use bus lanes
- Hire cars to park in taxi, bus, loading zones etc.
- Fix Adelaide Airport rank and drop off
- Increase training for concierges
- Metropolitan vehicles bringing down standards
- Passengers ringing all CBSs for single trip creating inefficiencies
- Penalties should be in the form of demerit points and higher accreditation fees
- Taxi and hire car availability by visual indicators (lights)
- Ability to book taxis and hire cars via DPTI or tourism websites
- Tell passengers of different transport methods or share modes – e.g. taxi there and bus back
- Industry needs a clear plan of what customers want

Access taxis

- Increase on-time bonus incentive from \$5 to \$10
- CBS to provide additional incentive
- Remove rank restrictions
- Increase penalties
- Stop releasing general licences – only release access licences
- Better training for access drivers

Country taxis and hire cars

- Apply surcharges to attract service provision
- Have a minimum fare of \$8
- Include vacant running charges
- Untie country taxi fares from metro (or from 20% limit)
- Have one uniform country taxi fare
- New despatch systems needed in country taxis
- Allow GPS meters
- Lack of knowledge of country drivers – more training needed
- Should be able to use EzyReg
- Doctors hard to see for medicals – timing issue for accreditation renewals
- Vehicle standards too low in country

Coordinated public transport

- Develop transport hubs for all transport
- Contract taxis for low patronage Adelaide metro areas/times

Fares and incentives

- Establish a joint committee on driver remuneration
- Need an independent body for setting taxi fares
- Taxi fares to be reviewed and increased annually
- Cease the release of licences
- CBS should develop reward system for drivers
- Need a booking fee for taxis
- Introduce midnight to dawn surcharge
- Lower the CTP premiums for taxis by spreading costs across all vehicles
- Pro rata CBS fees for bookings received by drivers
- Delete country running with negotiated fare based on meter
- Set estimated fare up front
- Pay taxi drivers by the hour, wage or on commission like hire cars
- Increase the taxi subsidy amount
- Have a higher flagfall but first two kilometres included (e.g. \$10 and \$12)
- Charge for loading luggage but flagfall only applies when in car
- Fares for taxis need to be increased by 50%
- Tourism work should be charged by the hour (e.g. \$50 per hour)
- Passengers should be charged if job cancelled
- Uniform fees and fares across Australia
- Stop licence release

Training

- Combine Knowledge of Adelaide with English and road laws
- Greater knowledge required by taxi drivers
- CBSs to do part or all of driver training
- Taxi Council SA to do driver training
- TAFE SA to do driver training
- Better/more training for taxi drivers
- Community training for drivers to cover conflict, work and life balance, stress, fitness etc.
- Train taxi drivers to be tourism ambassadors
- Incentives for drivers to do training
- Sexual discrimination and cultural training for drivers
- More training for hire car drivers
- Provide free training seminars for operators
- Have refresher/follow-up training for drivers

Lease

- CBS should have no role in brokering or leasing plates
- Lease fees to be based on 15% of turnover by MTDData
- Restrict numbers of licences that can be leased per operator
- Have more owner-drivers
- Reduce cost burden on lessees
- Access taxis should have fewer commercial restrictions, e.g. they should be able to lease licences to others

Regulation

- Over regulation
- Too much paperwork
- Government should buy back taxi licences
- Chauffeur vehicles should be able to keep original/vintage plates and should not be sold off by government
- Reclassify small tour vehicles
- Ability to have an inspection on vehicles prior to purchase
- Plates should be transferred at local Services SA office
- Should be able to use Ezyreg on-line
- Reduce duplication of medical checks for licence and accreditation
- Issue a temporary accreditation while drivers are getting screened
- Petcabs to use name 'cab' and have special vehicle requirements
- Public servants should only use taxis
- Drivers should be permitted to use electronic worksheets
- Vehicle inspections using tablets
- First inspection for roadworthy and tidy followed by monthly tidiness inspections
- Fix TV plates rorting system (TV s doing MV work).
- MV/TV categories need to be reviewed
- Pro-rata charge for renewal, e.g. only pay for renewal period actually used
- Change the definition of bus from special-purpose vehicle for minibuses and commuter vans. Bus should be 18 seats and traditional bus shape.
- Tourism and transport departments need to talk to each other
- DCSI driver screening too slow
- TV hire cars should keep log book of worked kilometres
- Yearly vehicle inspections should be retained for hire cars
- Entry level for TV hire cars – maximum of 320,000 km
- All stretch limousines should have maximum of 15 years from date of stretch
- Combine not-for-hire sign with inspection label
- Cost of screening, medicals etc. too high for drivers
- Hire cars taking taxi work where operator has both hire cars and taxis
- Operators should contract directly with departments after the CBS wins the contract for its fleet
- Large passenger accreditation too long
- Cost of registration etc. too high for operators

Rideshare issues

- Rideshare safety lacking
- Rideshare should pay tax
- Loss of work/jobs from taxis and hire cars to rideshare
- Rideshare will lead to a reduction in service standards
- Investment in plate and business values for taxis and hire cars will drop
- Allow rideshare but regulate.

Taxi Subsidy Scheme – Lift Fee

Jurisdiction	Smartcard	Incentives
Queensland	Yes (2007)	N/A
Victoria	Yes (2007)	\$16.50 lifting fee for wheelchair accessible taxis. \$8.25 lifting fee for conventional taxis.
South Australia	No	'On time bonus', \$5 to operator/driver plus \$1 to booking company if driver arrives within 12 minutes.
Western Australia	No	\$10 lift fee for a rank/hail job, \$12 lift fee for a pre-booked job.
Tasmania	Yes (2014)	\$20 lift fee, per passenger.
Northern Territory	Yes (2010)	\$20 per trip lift fee.
Australian Capital Territory	Yes (2013)	\$13 lift fee, per passenger (increases on public holidays).
New South Wales	No	\$7.70 lift fee, per passenger

Kowalick Recommendations

The following represents an overview of the actions undertaken in relation to each of the key recommendations within the Kowalick Report (Kowalick, 2001).

Recommendation 1 - All Access Cab booking should be logged with the Access Cabs CBS by customers.

Progress

Programming changes were implemented which resulted in booking numbers being dispatched to all drivers of Access Taxi vehicles. The changes ensured a validation procedure is in place for all vouchers lodged by Access Taxi operators.

Recommendation 2 - A CBS must know what cabs are available for work at any time

Progress

This was implemented.

Recommendation 3 - All jobs dispatched via the Access Cabs CBS should require an auditable booking number from the CBS.

Progress

This was implemented.

Recommendation 4 - The CBS operator to have the authority from the PTB to direct a driver to take a job to achieve acceptable performance standards.

Progress

This was implemented

Recommendation 5 - The system should use an existing CBS operator's infrastructure but with more manual intervention to ensure that excessive waiting times or delays are rectified by manual intervention.

Progress

This was implemented.

Recommendation 6 - Second radios should be phased out over a short period.

Progress

This recommendation was not supported and has not been implemented.

Recommendation 7 - Interference with, or disconnection of, the cars, GPS systems should be banned and policed.

Progress

This recommendation was implemented.

Recommendation 8 - Consideration should be given to payment of a loading fee to Access drivers.

Progress

This recommendation was implemented as an on-time bonus.

Recommendation 9 - The Government should consider removal of the limit on the number of SATSS vouchers issued to persons eligible for a 75%.

Progress

This recommendation was not implemented. However, the number of SATSS vouchers issued to individuals was increased and the value of the rebate to customers for each trip was also increased by 33% in 2006.

Training Units for Taxi Drivers (Tlisc.org.au, 2016)

TLIC3011 Transport passengers with disabilities

APPLICATION

This unit involves the skills and knowledge required to operate vehicles used for the transport of people who have a disability, in accordance with relevant state/territory road and traffic authority licence requirements and regulations.

It includes undertaking pre-operational vehicle checks and vehicle ancillary equipment; assisting passengers to use restraints and ancillary equipment; providing appropriate support to passengers during their journey; and manoeuvring the vehicle with due consideration of passengers' disabilities and the requirements of relevant government regulations.

Work is performed with limited or minimum supervision, and within duty of care responsibility for self and others in achieving the prescribed outcomes.

UNIT TITLE TLIB2090 Use communication systems in a taxi

APPLICATION

This unit involves the skills and knowledge required to use taxi cab communications systems by applying established communications principles and practices for taxi drivers.

It includes identifying features of taxi communications system and operating it effectively, using appropriate communications protocols and communicating with a base. It also includes identifying faulty communications equipment operation and taking appropriate action, and using technical and colloquial language and vocabulary in day-to-day communications.

Communication systems are used in accordance with codes/regulations and workplace requirements relevant for using taxi communications systems in the taxi industry.

Safety checks and equipment tests are performed with limited or no supervision, and with full accountability and responsibility for self and others in achieving the prescribed outcomes.

This unit meets part of the certification requirements for obtaining taxi driver accreditation. As requirements may vary between states and territories, people seeking taxi accreditation should contact their state/territory taxi regulator.

UNIT TITLE TLIL2019 Provide taxi customer service

APPLICATION

This unit involves the skills and knowledge required to apply routine customer service procedures to passengers in taxis, in accordance with taxi industry regulations and relevant legislative requirements.

It includes establishing effective communication, identifying and assessing the needs and expectations of different customers, meeting identified customer requirements and dealing with difficult customer situations at all points of customer contact before, during and after a journey.

Work is performed with limited or not supervision, and with full accountability and responsibility for self and others in achieving the prescribed outcomes.

This unit meets part of the certification requirements for obtaining taxi driver accreditation. As requirements may vary between states and territories, people seeking taxi accreditation should contact their state/territory taxi regulator.

UNIT TITLE TLIL2060 Complete induction to the transport industry**APPLICATION**

This unit involves the skills and knowledge required to complete workplace induction procedures when commencing work in the transport and logistics industry, in accordance with regulatory requirements, and operational policies and procedures.

The unit enables a driver to enter and participate in typical workplace activities. It includes identifying major areas of the occupations; applying legislation, regulations and codes of practice; and identifying key industrial relations elements.

This unit applies to all employees wishing to enter the transport and logistics industry; however it is predominantly aimed at taxi to multi-combination drivers. It can also be used within the warehousing and logistics sectors of the industry.

Work is performed with limited or no supervision, and with full accountability and responsibility for self and others in achieving the prescribed outcomes.

This unit meets part of the certification requirements for obtaining taxi driver accreditation. As requirements may vary between states and territories, people seeking taxi accreditation should contact their state/territory taxi regulator.

UNIT TITLE TLIP2037 Carry out financial transactions and maintain records.**APPLICATION**

This unit involves the skills and knowledge required to carry out financial transactions and to maintain records when providing taxi services. This involves using basic financial transaction principles, routine procedures and regulatory requirements, as part of taxi driving operations.

It includes operating a taxi meter in accordance with different tariff structures and taxi hire arrangements, calculating fares and handling payment transactions, and maintaining daily records for accounting purposes.

This unit meets part of the certification requirements for obtaining taxi driver accreditation. As requirements may vary between states and territories, people seeking taxi accreditation should contact their state/territory taxi regulator.

UNIT TITLE TLIH3004 Identify major roads, services and attractions**APPLICATION**

This unit involves the skills and knowledge required by taxi drivers, bus/coach drivers and other transport drivers to identify and describe major roads, services and attractions, on a map and as required, physically pointing them out. Work must be carried out in accordance with relevant transport regulations and workplace procedures.

It includes knowing about local geographical details and features of major roads, highways and suburbs in the area of operation.

It also includes identifying transport interchanges, jetties, ports, stations, terminals, suburbs, landmarks, public services, facilities, tourist attractions and central business districts.

Work is performed with limited supervision, and with duty of care responsibility for self and others in achieving the prescribed outcomes.

This unit meets part of the certification requirements for obtaining specialist driver accreditations. As requirements may vary between state and territories, people seeking specialist driver accreditation should contact their state/territory licensing regulator.

TLIF2010 Apply fatigue management strategies.**APPLICATION**

This unit involves the skills and knowledge required to apply fatigue management strategies within the transport and logistics industry. Work is undertaken in compliance with relevant legislation, regulations, codes and guidelines.

It includes identifying and acting on signs of fatigue and implementing appropriate strategies to minimise fatigue during work activities, in particular when operating equipment, trains, vehicles, load shifting equipment, marine vessels and aircraft.

Work is performed under some supervision generally within a team environment.

UNIT TITLE TLIF2072 Comply with safety and security procedures**APPLICATION**

This unit involves the skills and knowledge required to work safely in the taxi industry by following and applying work health and safety (WHS)/occupational health and safety (OHS) and security procedures when carrying out taxi work activities. Work is undertaken in accordance with relevant WHS/OHS regulations and procedures.

It includes identifying and following workplace procedures for safety/security and accident/emergency situations, and identifying, minimising and managing fatigue.

Work is performed with limited or no supervision and with full accountability and responsibility for self and others in achieving the prescribed outcomes.

This unit meets part of the certification requirements for obtaining taxi driver accreditation. As requirements may vary between states and territories, people seeking taxi accreditation should contact their state/territory taxi regulator.

TLIF1001 Follow work health and safety procedures**APPLICATION**

This unit involves the skills and knowledge required to follow and apply work health and safety (WHS)/occupational health and safety (OHS) procedures when carrying out work activities in compliance with the relevant WHS/OHS regulations and procedures.

It includes following workplace procedures for hazard identification and risk control, contributing to WHS/OHS management arrangements and completing WHS/OHS records.

Work is performed under some supervision generally within a team environment. It involves applying established WHS/OHS and hazard minimisation principles and procedures to conduct workplace activities.

On Road Training.

The on road training session is conducted by the approved training provider (RTO) in a operating taxi and covers,

- Completing Pre Shift vehicle checks for roadworthiness.
- Operational procedures and practical training on taxi equipment including;
- Central door locking operation including child proof locks
- Manual “in boot” release location
- Changing a flat tyre procedure
- LPG filling, practical and safety demonstration
- Baby capsule fitting

- MTDData functions and operation, using inbuilt Navigation System
- Each trainee accepts and completes a dummy job from the MTDData
- Meter functions and operation
- EFTPOS machine functions and operation
- Two Way operation and protocols when speaking to dispatcher
- Alarm and Security Camera instruction and operation
- GPS tracking
- Each trainee completes a worksheet for their drive

Each trainee is assessed at the completion of the practical on road training session to meet the required skills and knowledge under TLIL2060A.

Letter from the Minister to all accredited Taxi and Chauffeur Vehicle drivers and operators



Government
of South Australia

The Hon Stephen Mullighan MP

Dear Sir/Madam,

I write regarding the review of the taxi and chauffeur vehicle industry announced by the government.

Taxis and chauffeur vehicle services are vital for our community. They are often the first experience of Adelaide for tourists and visitors, and many South Australians rely on services to get home safely after a night out, or to move around our communities.

Vehicles, technologies and customer expectations are changing and a wide ranging review of the South Australian Government's regulation of the taxi and chauffeur vehicle industry seeks to identify opportunities to improve services, ensure drivers and properly remunerated, and the industry continues to grow into the future.

A review panel (the panel) has been established to produce a discussion paper, consult with industry and consumers, and provide final recommendations to government.

The panel comprises Mr Greg Crafter, Mr Michael Luchich, and Ms Jane Jeffreys who bring an array of expertise in business, IT, public administration, tourism and hospitality.

The review will focus on the following terms of reference:

- service standards and opportunities for improvement
- safety and security for passengers and drivers
- driver remuneration and working conditions
- fares and surcharges
- training and accreditation requirements
- vehicle standards and requirements
- centralised booking services
- synergies with other forms of public transport
- innovation, new technologies and competition
- taxi and chauffeured vehicle roles in the tourism visitor experience
- regional Services
- adequacy and cost of accessible taxis

I am seeking your feedback on these issues, including your views on how we can improve and change to meet these new challenges.

Minister for Transport and Infrastructure
Minister Assisting the Minister for Planning
Minister Assisting the Minister for Housing and Urban Development



Please provide your feedback by email to DPTI.TaxiHireCarReview@sa.gov.au, by calling 7109 7212, or by visiting the Your Say website at www.yoursay.sa.gov.au

I look forward to working with you in the future.

Yours sincerely

A handwritten signature in blue ink, appearing to read 'Steve', with a horizontal line underneath.

HON STEPHEN MULLIGHAN MP
MINISTER FOR TRANSPORT AND INFRASTRUCTURE

16 June 2015

Advertisement seeking public comment in the Advertiser – Friday 24 July 2015



Government of South Australia
Department of Planning,
Transport and Infrastructure

Have your say on the future of the Taxi and Chauffeur Vehicle Industry

A review of the taxi and chauffeur vehicle industry has been announced by the State Government.

Taxis and chauffeur vehicles are an important part of our public transport network, and are often the first experience of Adelaide for visitors and tourists. It is necessary for the industry to grow and thrive into the future. Changes in technology and consumer demands are presenting a significant opportunity to review the taxi and chauffeur vehicle industry that will lead to lasting improvements.

A review panel (the panel) has been established to produce a discussion paper, consult with industry and consumers, and provide final recommendations to government.

The panel is calling for input and comments regarding:

- what are the opportunities for improvement of the taxi and chauffeur industry?
- an outline of the current and future challenges of the taxi and chauffeur industry
- how and what the future of the taxi and chauffeur industry looks like.

Submissions can be sent via:
email: DPTI.TaxiHireCarReview@sa.gov.au

Post: The Taxi and Chauffeur Vehicle Industry Review Panel
C/- Department of Planning, Transport and Infrastructure
PO Box 1533
Adelaide SA 5001

Closing date for submissions is 5pm 11 September 2015

PN0020

www.dpti.sa.gov.au



URGENT PROOF

Please read and check that all information is correct

P 08 8130 1900

CLIENT	DPTI
JOB NUMBER	PN0020
COORDINATOR	Ali
APPROVAL BY	Thur 23 July

PUBLICATION	Advertiser
CLASSIFICATION	EGN
SIZE	M5x2 (156 x 85mm)
INSERTION	Fri 24 July

ARTIST	Mark
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Please advise us of approval ASAP.
The final responsibility for the accuracy of your
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APPROVAL

SIGNED
DATE

AUTHORS ALTERATIONS VERSION

2

Survey Sticker with QR Code



Help shape the future of taxis and hire cars in SA

Visit www.dpti.sa.gov.au or scan our QR code to **have your say here**

Adelaide Metro Info Line: **1300 311 108**



Terms of Reference and Review Panel

Taxi and Chauffeur Vehicle Industry Review

Taxis and chauffeur vehicles are an important part of our public transport network, and are often the first experience of Adelaide for visitors and tourists. It is necessary for the industry to grow and thrive into the future. The ability to provide improved services and an enhanced customer experience to these journeys is one of many outcomes intended in this review.

While many drivers and vehicles involved in the industry do a stellar job, there is concern that service standards must increase and improve.

Changes in technology and consumer demands are presenting a significant opportunity to review the taxi and chauffeur vehicle industry that will lead to lasting improvements.

The South Australian Government believes the system should provide the highest standards of customer service while providing stringent safety requirements, foster innovation and allow fair competition, and secure the future viability of the industry, and at the same time preserving a level playing-field for those operating, or wishing to operate, within the industry.

Timeline

The Review Panel will meet with industry representatives, participants and stakeholders, and produce a discussion paper. This paper will be released for public comment and discussion for one month. Feedback from this will inform a final report and recommendations to the Government. It is anticipated the review will be completed within six months. ■

Terms of Reference

- Service standards and opportunities for improvement
- Safety and security for passengers and drivers
- Driver remuneration and working conditions
- Fares and surcharges
- Training and accreditation requirements
- Vehicle standards and requirements
- Centralised booking services
- Synergies with other forms of public transport
- Innovation, new technologies and competition
- Taxi and chauffeured vehicle roles in the tourism visitor experience
- Regional services
- Adequacy and cost of accessible taxis

The Review Panel



Mr Michael Luchich

Mr Luchich has more than 20 years domestic, interstate, national and international senior executive and commercial experience at Board level, CEO/MD & General Manager levels, across a range of industries and organisational structures. He is the State Director of Dimension Data, a Global IT organisation and was formerly the State Director of Telstra in SA/NT, and is a former chair of the Australian Information Industry Association.



Mr Greg Crafter

Mr Crafter is highly regarded as a former South Australian Government Minister. He served as a member of the Passenger Transport Board from 1994 to 2004 and his current roles include being a member of the national board of the Calvary Hospitals and a member of the South Australian Housing Trust Board.



Ms Jane Jeffreys

Ms Jane Jeffreys is an experienced Company Director and has extensive experience in business, tourism and hospitality including as a consultant to both the public and private sectors. Current board appointments include the South Australian Tourism Commission and the Adelaide Convention Centre.



**Government of
South Australia**

Follow @DPTI_SA or @adelaidemetroSA on Twitter and Facebook for updates. In the meantime tell us your thoughts on what can be done to improve the Taxi and Chauffeur Vehicle Industry:

Enquiries:

Email: DPTI.TaxiHireCarReview@sa.gov.au
Phone: 7109 7212

Written submissions:

Taxi and Chauffeur Vehicle Review
PO Box 1533
Adelaide SA 5001



Results

Survey 444787

Number of records in this query:	2266
Total records in survey:	2266
Percentage of total:	100.00%



Field summary for PageOne1

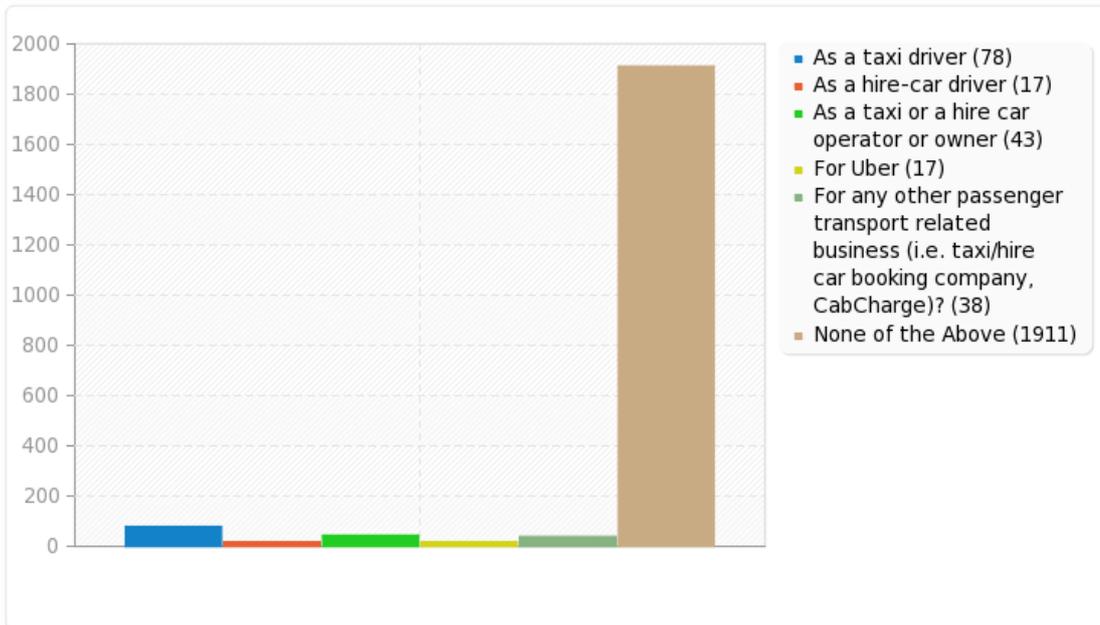
1. Do you or anyone else in your household work:

Answer	Count	Percentage
As a taxi driver (SQ001)	78	3.70%
As a hire-car driver (SQ002)	17	0.81%
As a taxi or a hire car operator or owner (SQ003)	43	2.04%
For Uber (SQ004)	17	0.81%
For any other passenger transport related business (i.e. taxi/hire car booking company, CabCharge)? (SQ005)	38	1.80%
None of the Above (SQ006)	1911	90.74%



Field summary for PageOne1

1. Do you or anyone else in your household work:





Field summary for PageOne2(SQ001)

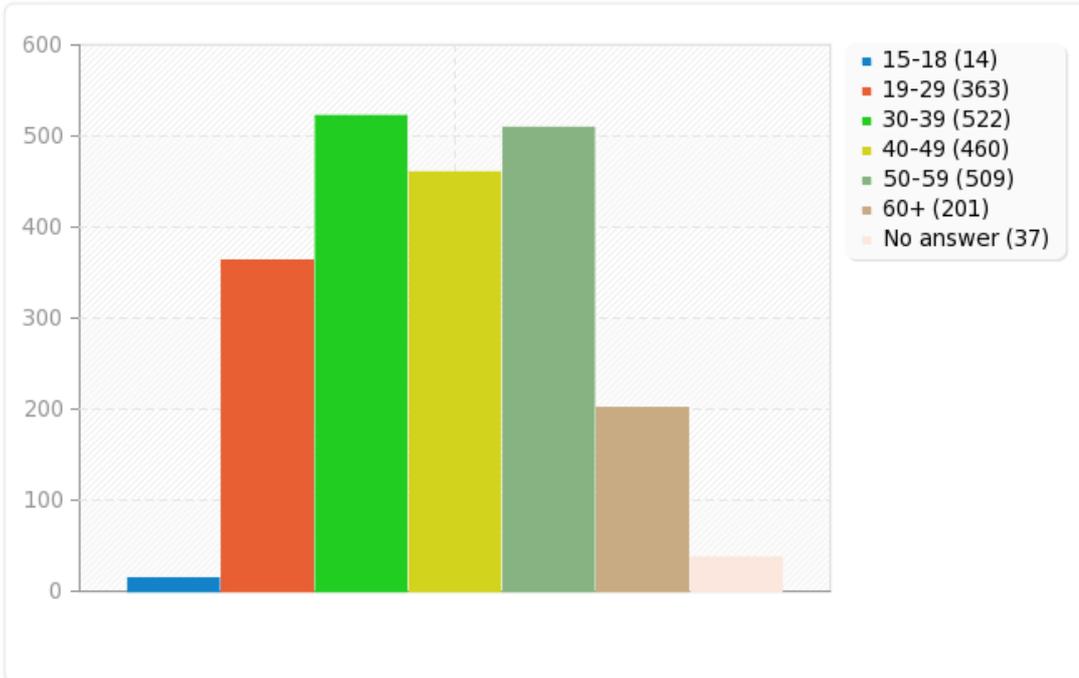
2. Which of the following groups do you fit into? [Choose an age group:]

Answer	Count	Percentage
15-18 (A1)	14	0.66%
19-29 (A2)	363	17.24%
30-39 (A3)	522	24.79%
40-49 (A4)	460	21.84%
50-59 (A5)	509	24.17%
60+ (A6)	201	9.54%
No answer	37	1.76%



Field summary for PageOne2(SQ001)

2. Which of the following groups do you fit into? [Choose an age group:]





Field summary for PageOne3(SQ001)

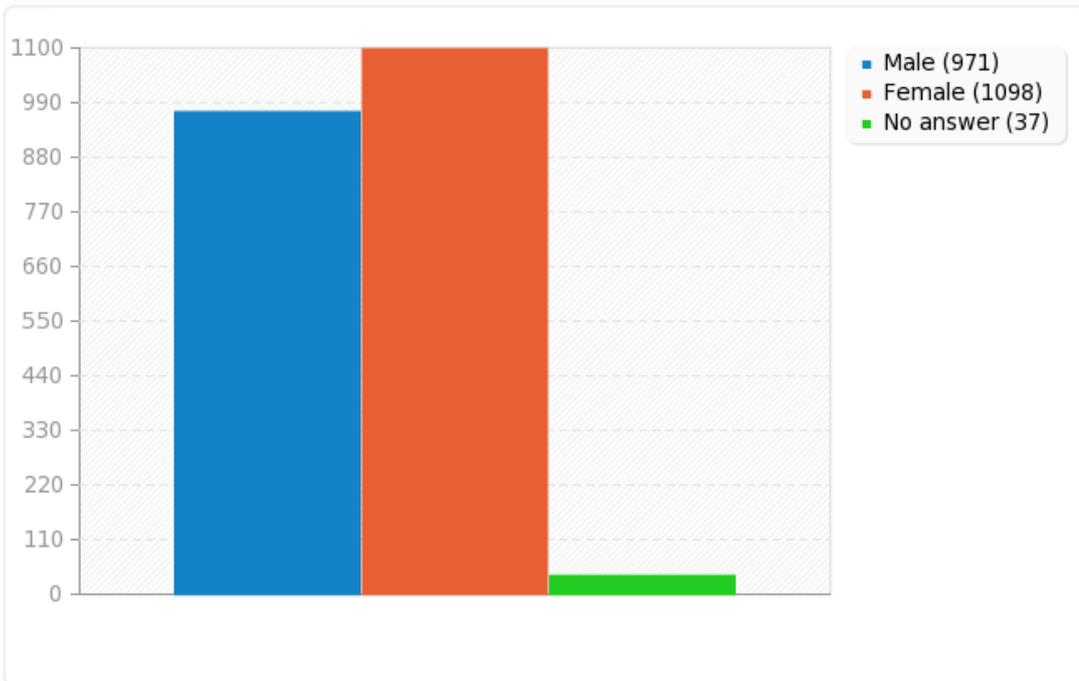
3. What is your gender? [Choose a gender option:]

Answer	Count	Percentage
Male (A1)	971	46.11%
Female (A2)	1098	52.14%
No answer	37	1.76%



Field summary for PageOne3(SQ001)

3. What is your gender? [Choose a gender option:]





Field summary for PageOne4(SQ001)

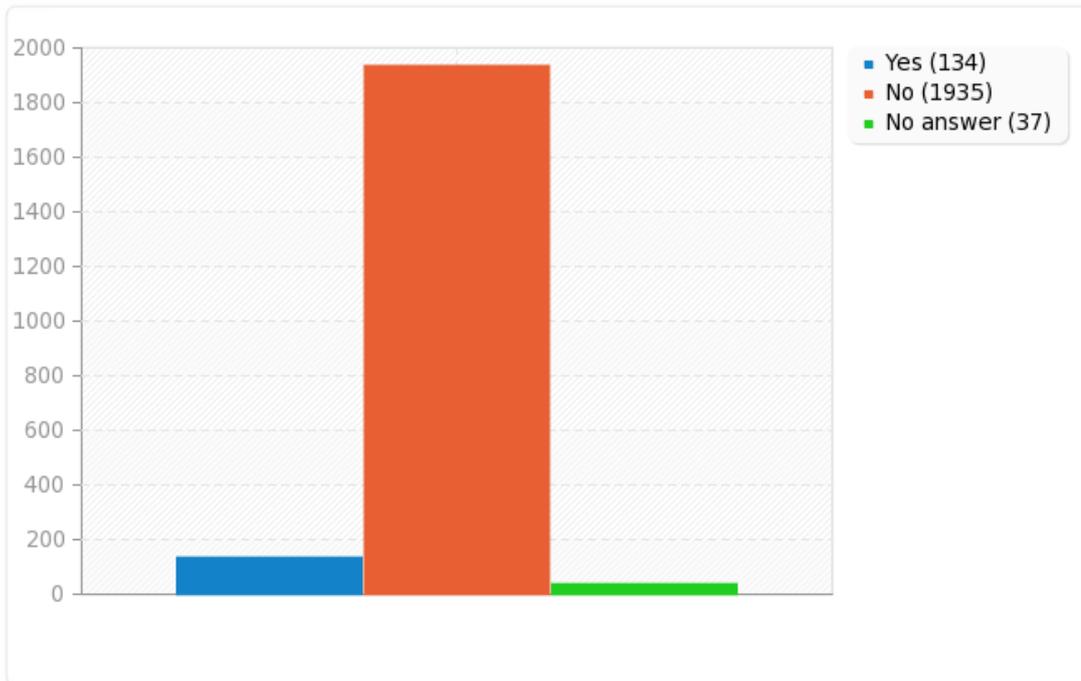
4. Do you receive any subsidised taxi fare from the government (i.e. access vouchers)? [Choose an option:]

Answer	Count	Percentage
Yes (A1)	134	6.36%
No (A2)	1935	91.88%
No answer	37	1.76%



Field summary for PageOne4(SQ001)

4. Do you receive any subsidised taxi fare from the government (i.e. access vouchers)? [Choose an option:]





Field summary for PageTwo5

5. What is your postcode?

Calculation	Result
Count	1971
Sum	9993957.0000000000
Standard deviation	257.64
Average	5070.5
Minimum	506.0000000000
1st quartile (Q1)	5034
2nd quartile (Median)	5066
3rd quartile (Q3)	5098
Maximum	6152.0000000000

Null values are ignored in calculations

Q1 and Q3 calculated using minitab method



Field summary for PageTwo6(SQ001)

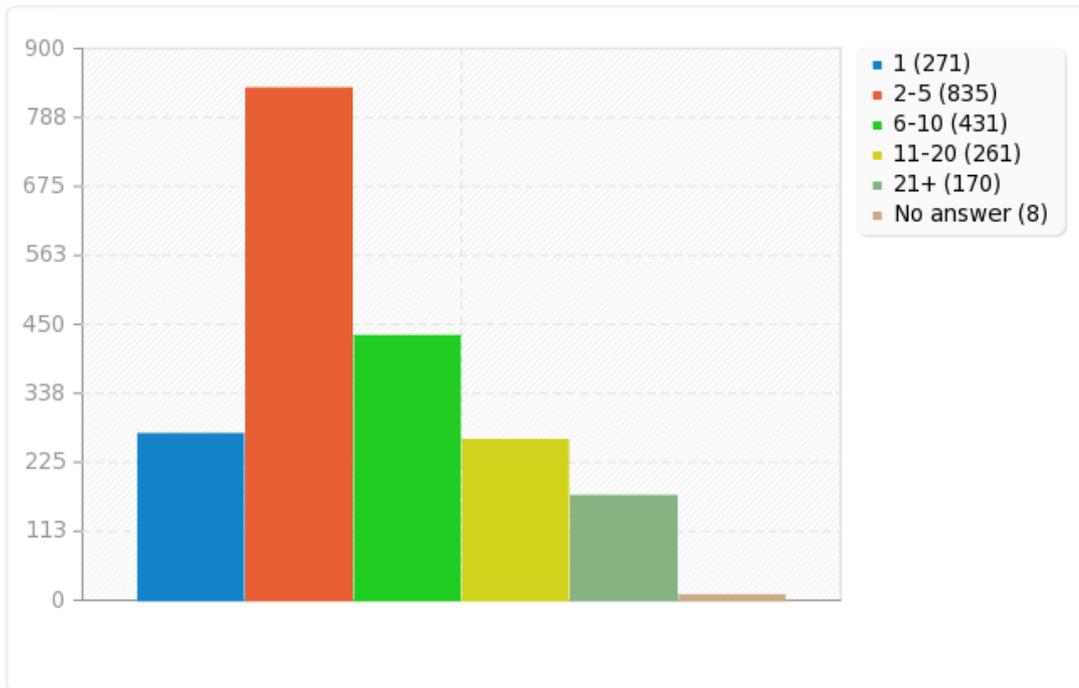
6. How many times have you used a taxi or hire-car (including UberBlack) in the last 6 months? [Choose an option:]

Answer	Count	Percentage
1 (A1)	271	13.71%
2-5 (A2)	835	42.26%
6-10 (A3)	431	21.81%
11-20 (A4)	261	13.21%
21+ (A5)	170	8.60%
No answer	8	0.40%



Field summary for PageTwo6(SQ001)

6. How many times have you used a taxi or hire-car (including UberBlack) in the last 6 months? [Choose an option:]





Field summary for PageTwo7[SQ001][SQ001]

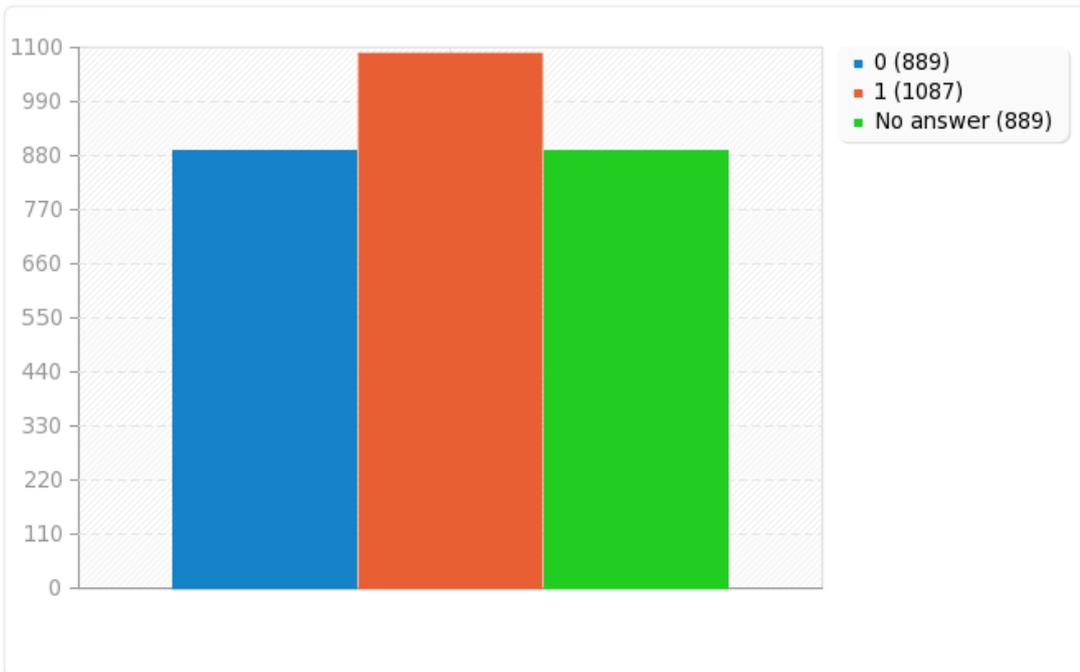
7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [Airport transport]

Answer	Count	Percentage
0 (0)	889	31.03%
1 (1)	1087	37.94%
No answer	889	31.03%



Field summary for PageTwo7[SQ001][SQ001]

7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [Airport transport]





Field summary for PageTwo7[SQ001][SQ002]

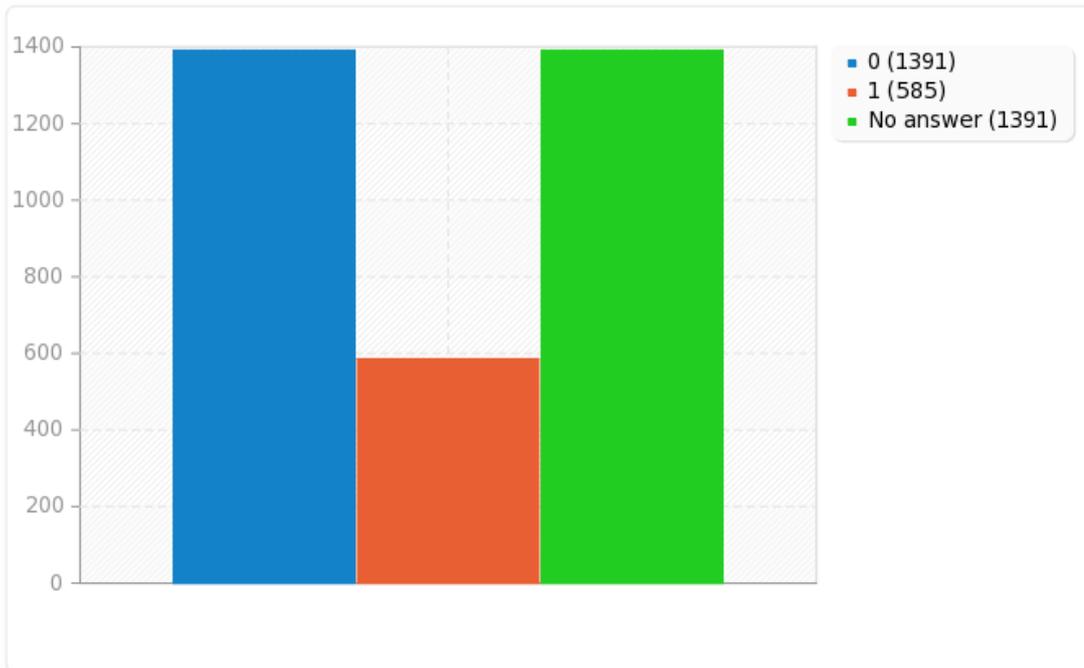
7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [Special and community events (e.g. attend wedding, football, concert)]

Answer	Count	Percentage
0 (0)	1391	41.31%
1 (1)	585	17.37%
No answer	1391	41.31%



Field summary for PageTwo7[SQ001][SQ002]

7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [Special and community events (e.g. attend wedding, football, concert)]





Field summary for PageTwo7[SQ001][SQ003]

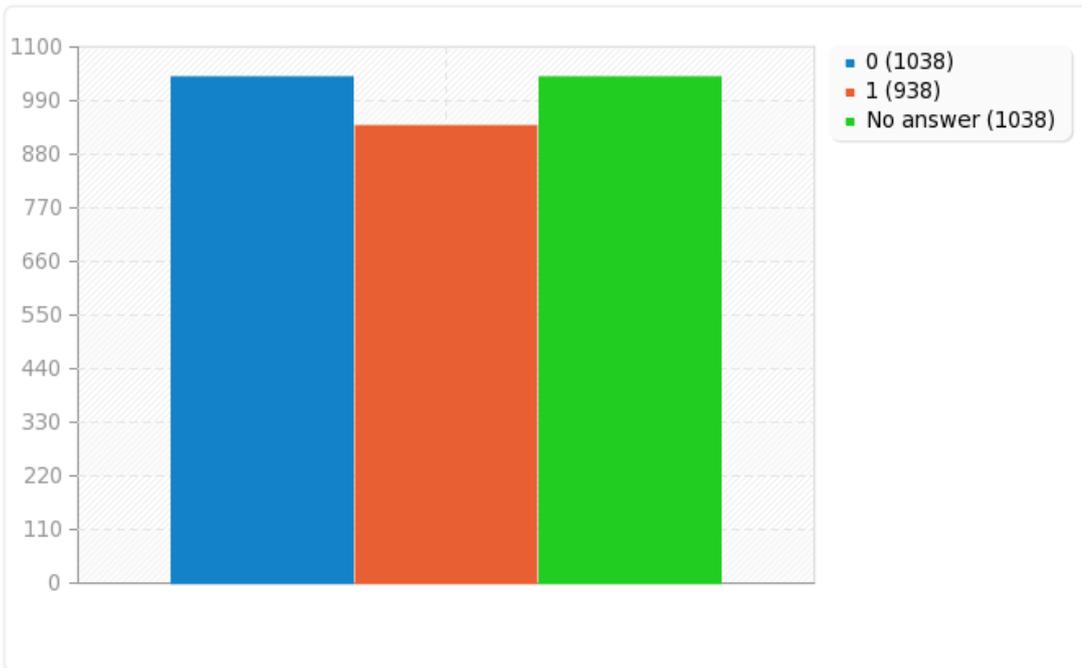
7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [General personal/social events (eg restaurants, medical)]

Answer	Count	Percentage
0 (0)	1038	34.44%
1 (1)	938	31.12%
No answer	1038	34.44%



Field summary for PageTwo7[SQ001][SQ003]

7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [General personal/social events (eg restaurants, medical)]





Field summary for PageTwo7[SQ001][SQ004]

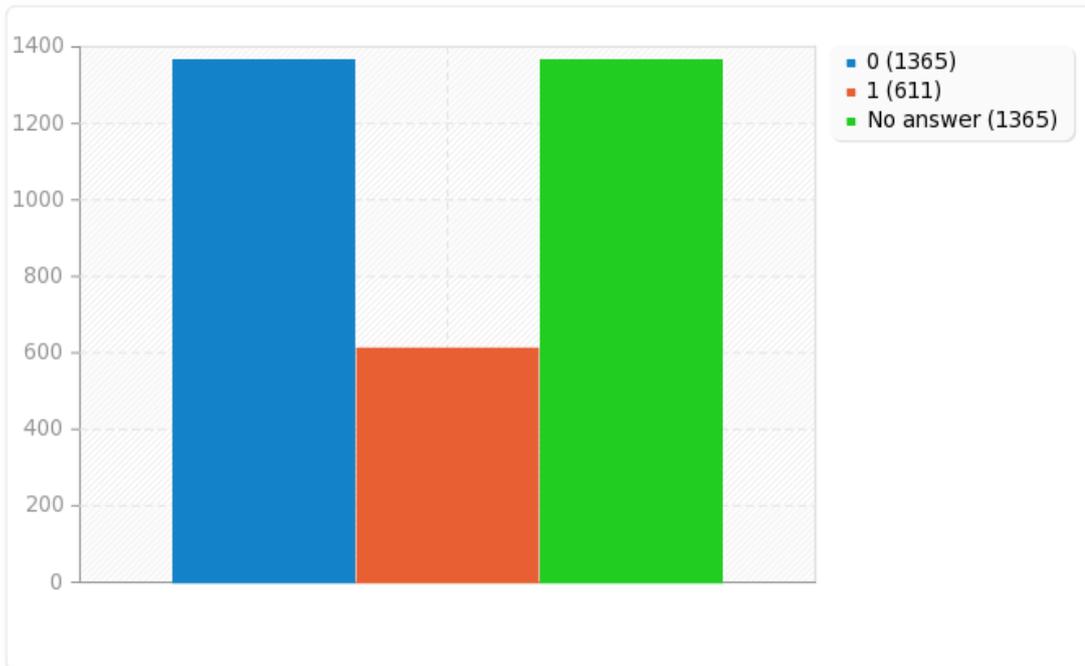
7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [General business trips (e.g. meetings)]

Answer	Count	Percentage
0 (0)	1365	40.86%
1 (1)	611	18.29%
No answer	1365	40.86%



Field summary for PageTwo7[SQ001][SQ004]

7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [General business trips (e.g. meetings)]





Field summary for PageTwo7[SQ001][SQ005]

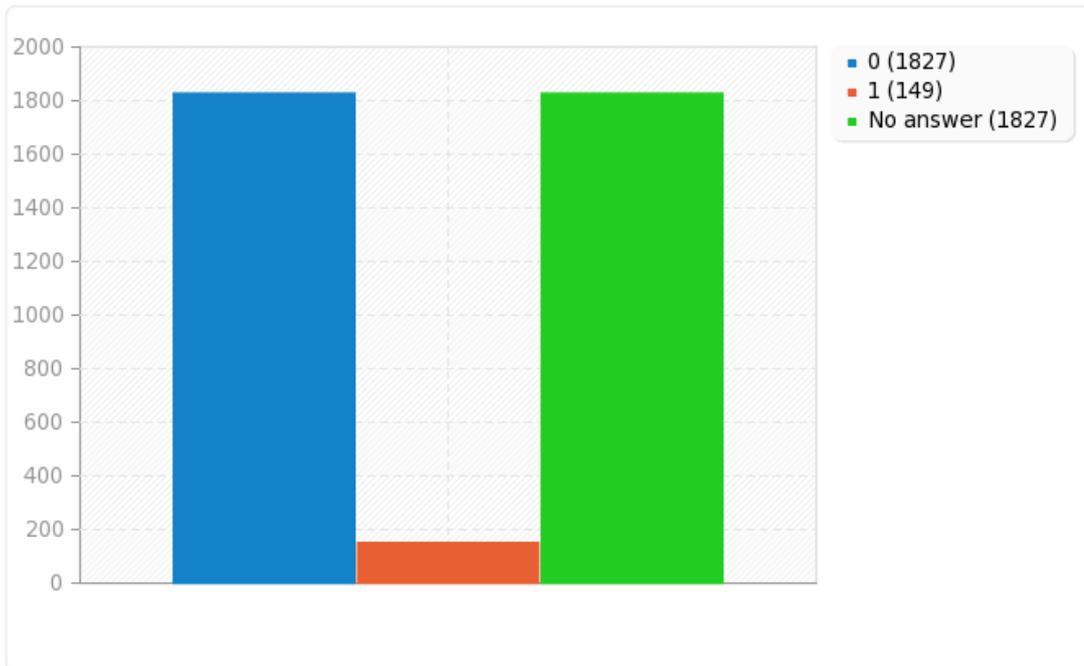
7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [Everyday travel (e.g. to and from work, shopping)]

Answer	Count	Percentage
0 (0)	1827	48.04%
1 (1)	149	3.92%
No answer	1827	48.04%



Field summary for PageTwo7[SQ001][SQ005]

7. When you use a taxi or hire car is it usually for: (you may choose more than 1) [Choose an option:] [Everyday travel (e.g. to and from work, shopping)]





Field summary for PageTwo8(SQ001)

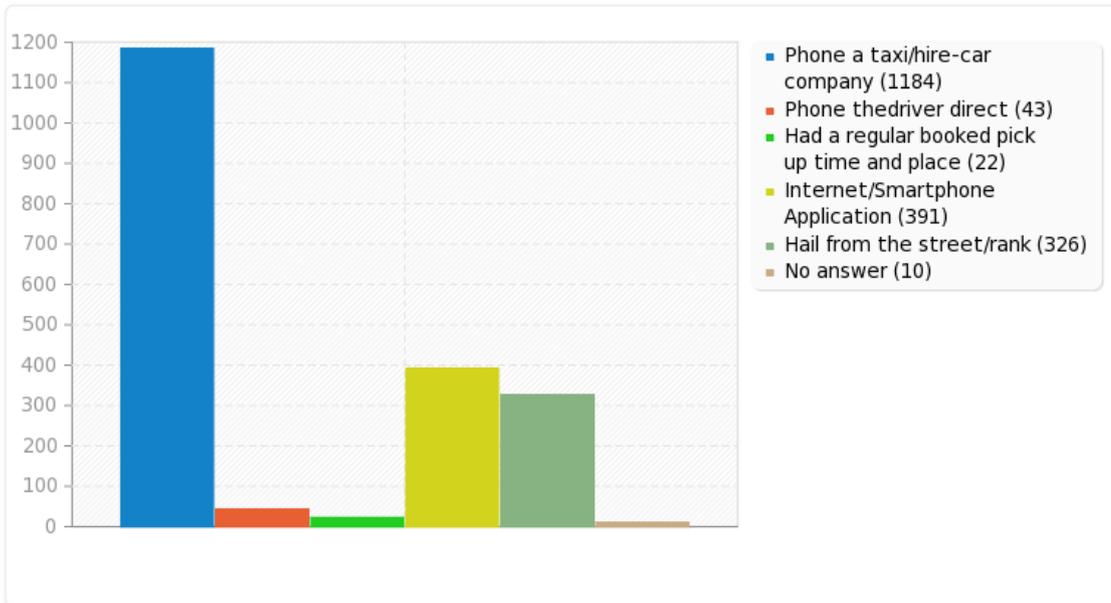
8. How do you usually HIRE (e.g. book) a taxi/hire car service? [Choose an option:]

Answer	Count	Percentage
Phone a taxi/hire-car company (A1)	1184	59.92%
Phone thedriver direct (A2)	43	2.18%
Had a regular booked pick up time and place (A3)	22	1.11%
Internet/Smartphone Application (A4)	391	19.79%
Hail from the street/rank (A5)	326	16.50%
No answer	10	0.51%



Field summary for PageTwo8(SQ001)

8. How do you usually HIRE (e.g. book) a taxi/hire car service? [Choose an option:]





Field summary for PageThree9(SQ001)

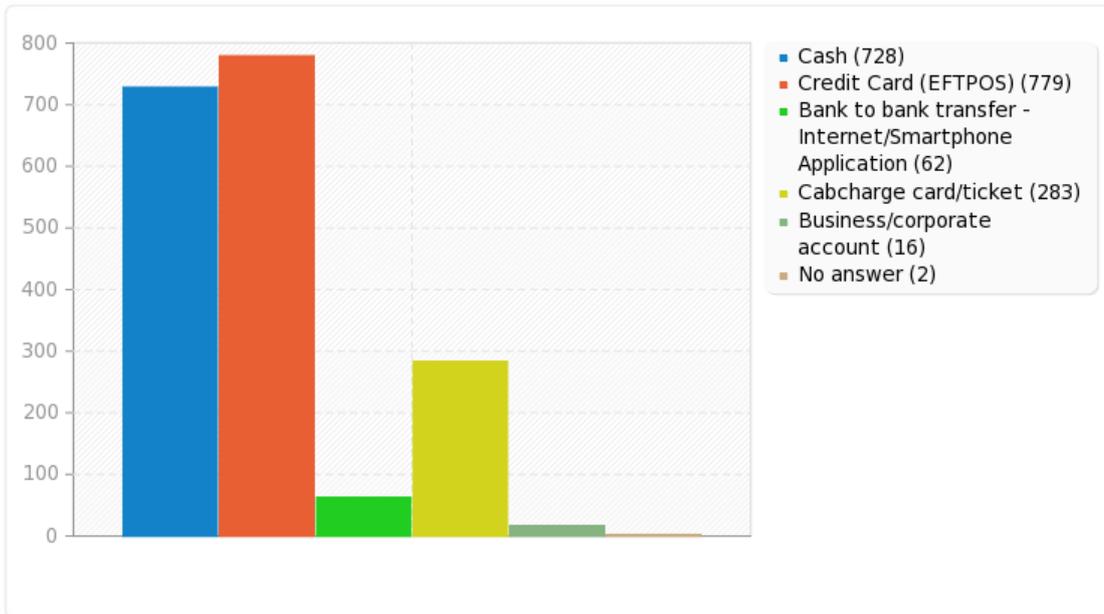
9. How do you usually PAY for a taxi/hire car service? [Choose an option:]

Answer	Count	Percentage
Cash (A1)	728	38.93%
Credit Card (EFTPOS) (A2)	779	41.66%
Bank to bank transfer - Internet/Smartphone Application (A3)	62	3.32%
Cabcharge card/ticket (A4)	283	15.13%
Business/corporate account (A5)	16	0.86%
No answer	2	0.11%



Field summary for PageThree9(SQ001)

9. How do you usually PAY for a taxi/hire car service? [Choose an option:]





Field summary for PageThree10(SQ001)

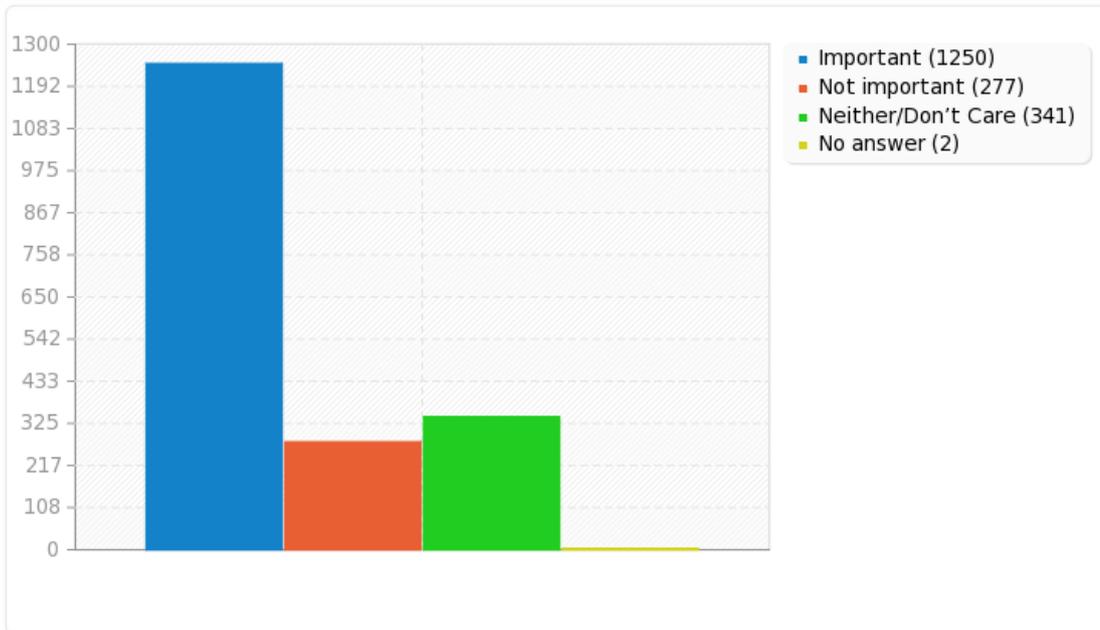
10. In terms of payment of a taxi/hire-car fare, how important are credit card transaction FEES when choosing how you pay? [Choose an option:]

Answer	Count	Percentage
Important (A1)	1250	66.84%
Not important (A2)	277	14.81%
Neither/Don't Care (A3)	341	18.24%
No answer	2	0.11%



Field summary for PageThree10(SQ001)

10. In terms of payment of a taxi/hire-car fare, how important are credit card transaction FEES when choosing how you pay? [Choose an option:]





Field summary for PageThree11(SQ001)

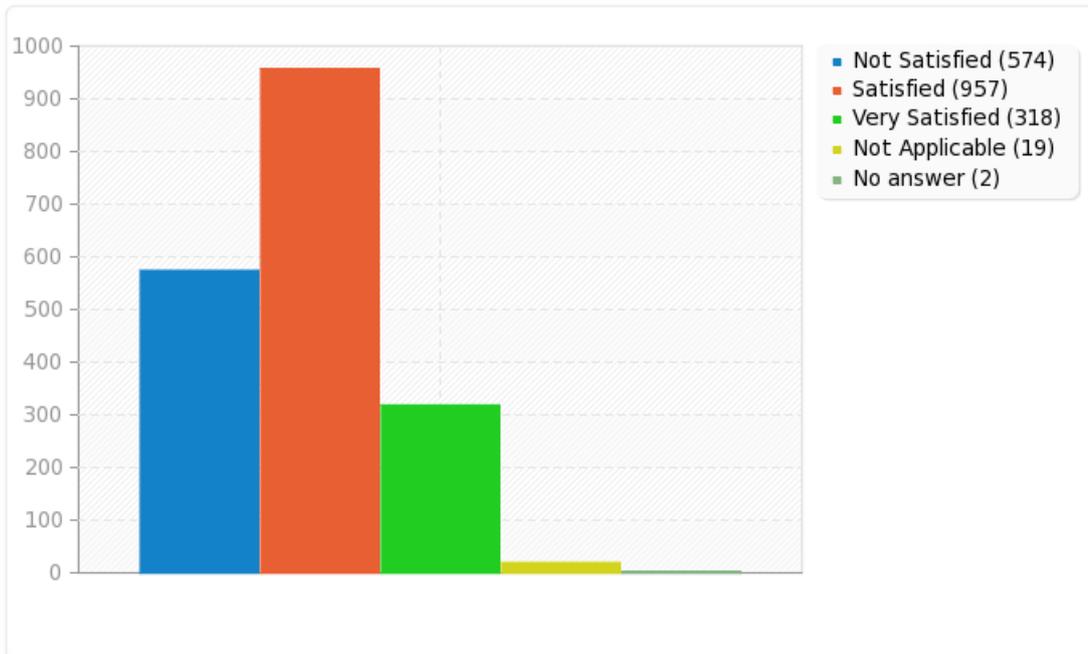
11. Thinking about your most recent TAXI journey, how satisfied were you with the service provided?
[Choose an option:]

Answer	Count	Percentage
Not Satisfied (A1)	574	30.70%
Satisfied (A2)	957	51.18%
Very Satisfied (A3)	318	17.01%
Not Applicable (A4)	19	1.02%
No answer	2	0.11%



Field summary for PageThree11(SQ001)

11. Thinking about your most recent TAXI journey, how satisfied were you with the service provided?
[Choose an option:]





Field summary for PageThree12(SQ001)

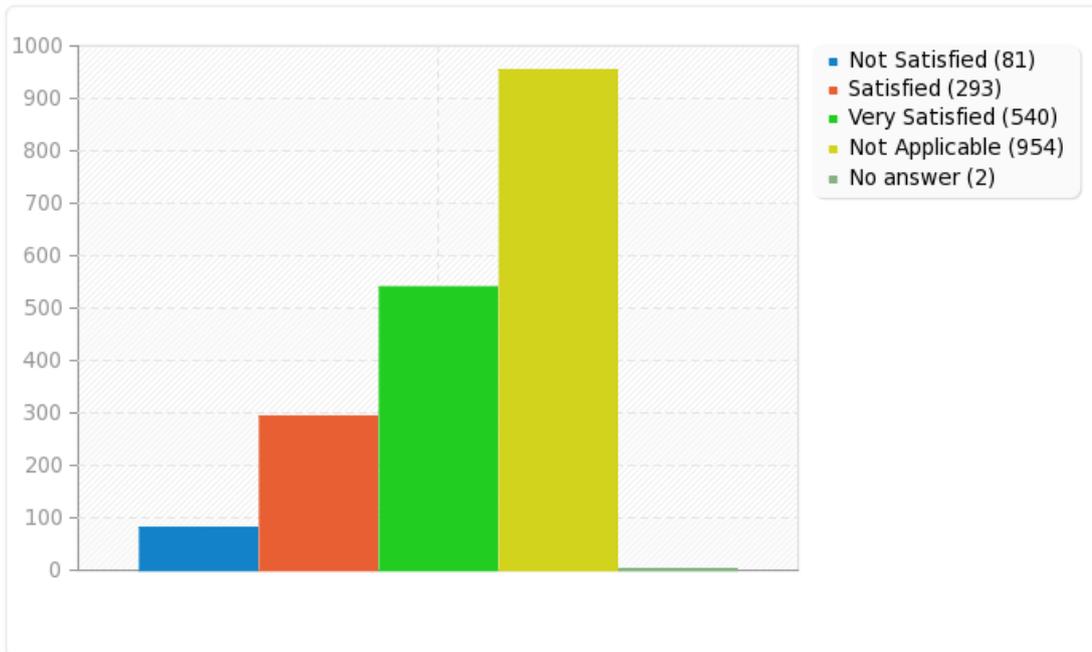
12. Thinking about your most recent HIRE-CAR (including UberBlack) journey, how satisfied were you with the service provided? [Choose an option:]

Answer	Count	Percentage
Not Satisfied (A1)	81	4.33%
Satisfied (A2)	293	15.67%
Very Satisfied (A3)	540	28.88%
Not Applicable (A4)	954	51.02%
No answer	2	0.11%



Field summary for PageThree12(SQ001)

12. Thinking about your most recent HIRE-CAR (including UberBlack) journey, how satisfied were you with the service provided? [Choose an option:]





Field summary for PageFour13(SQ001)

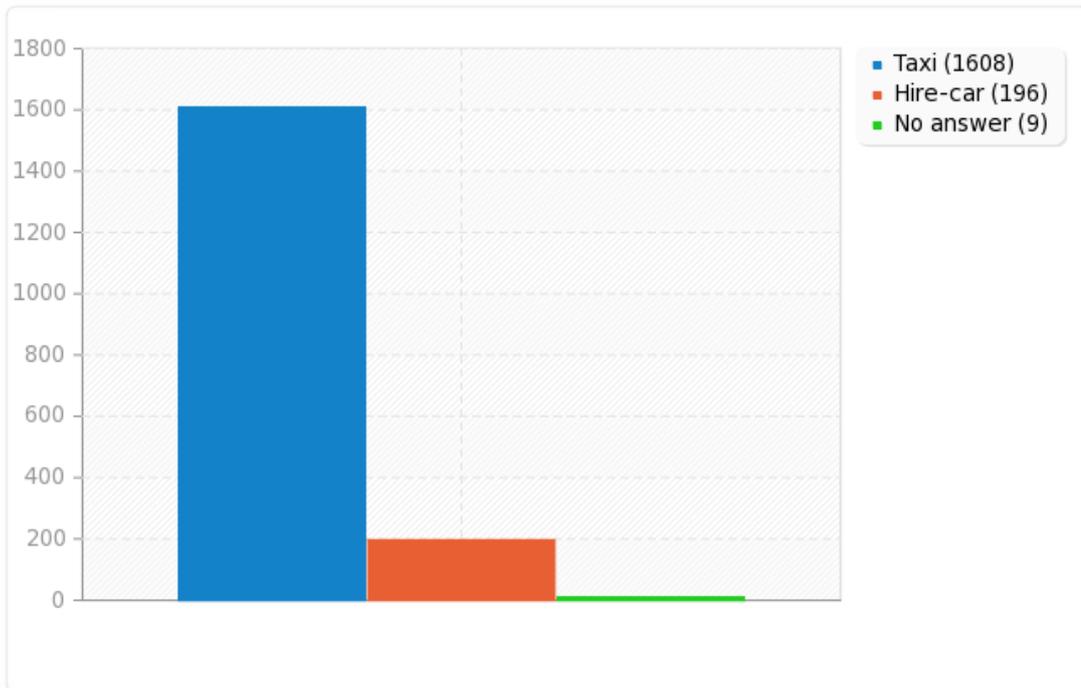
13. Which do you use the most frequently? [Choose an option:]

Answer	Count	Percentage
Taxi (A1)	1608	88.69%
Hire-car (A2)	196	10.81%
No answer	9	0.50%



Field summary for PageFour13(SQ001)

13. Which do you use the most frequently? [Choose an option:]





Field summary for PageFour14A(SQ001)

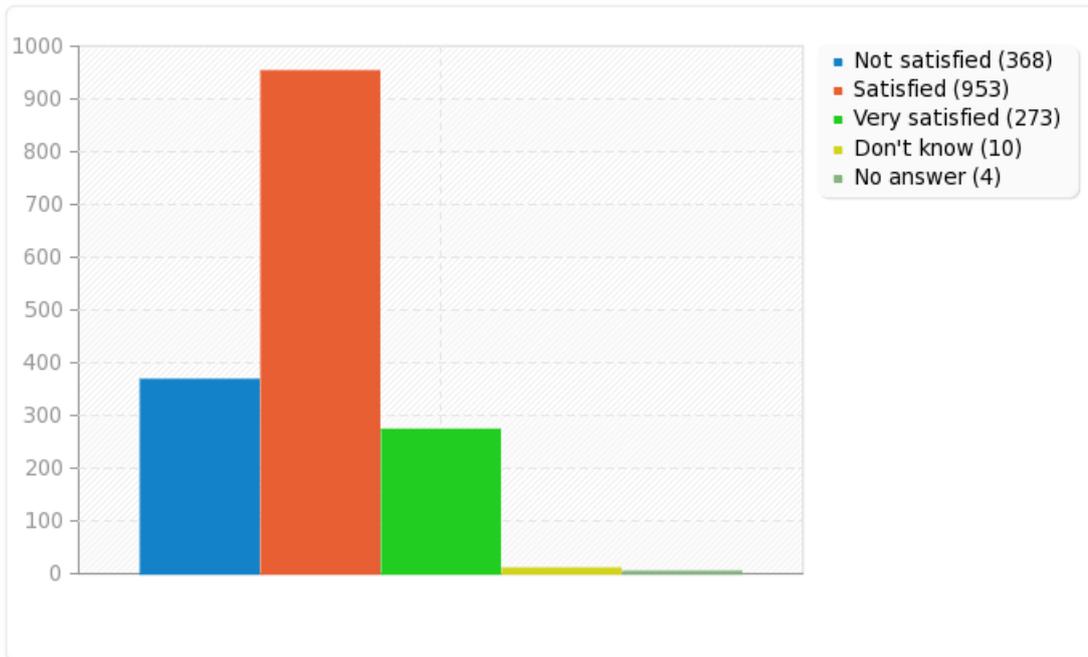
14A. In terms of a TAXI generally how satisfied were you with the following? [Condition of the Car (clean, undamaged)]

Answer	Count	Percentage
Not satisfied (A1)	368	22.89%
Satisfied (A2)	953	59.27%
Very satisfied (A3)	273	16.98%
Don't know (A4)	10	0.62%
No answer	4	0.25%



Field summary for PageFour14A(SQ001)

14A. In terms of a TAXI generally how satisfied were you with the following? [Condition of the Car (clean, undamaged)]





Field summary for PageFour14A(SQ002)

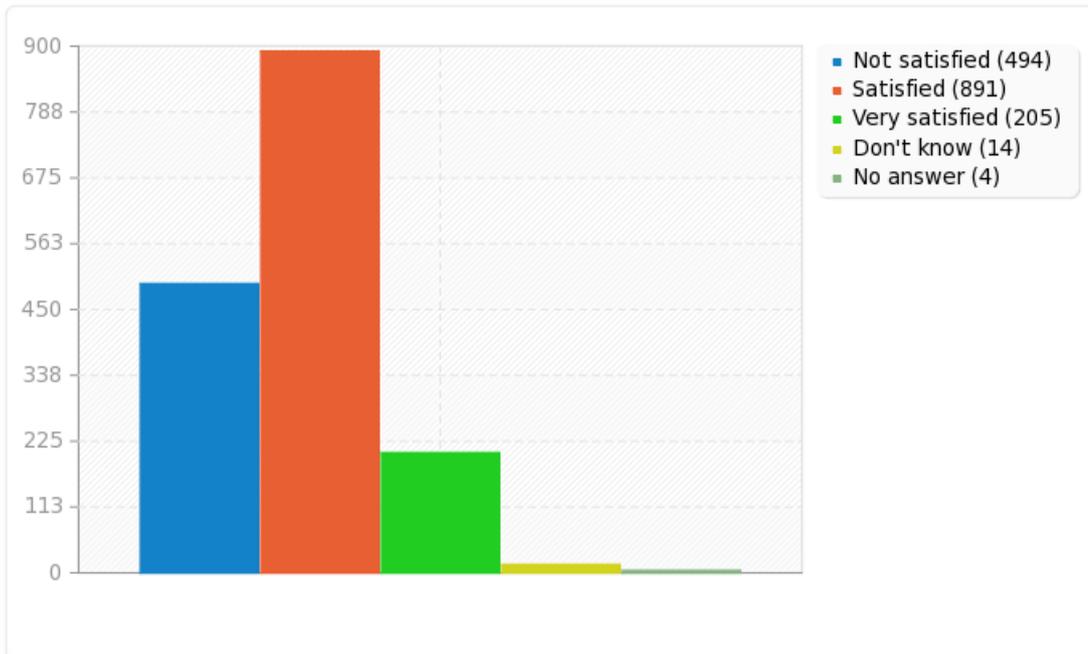
14A. In terms of a TAXI generally how satisfied were you with the following? [Appearance and personal hygiene of the Driver]

Answer	Count	Percentage
Not satisfied (A1)	494	30.72%
Satisfied (A2)	891	55.41%
Very satisfied (A3)	205	12.75%
Don't know (A4)	14	0.87%
No answer	4	0.25%



Field summary for PageFour14A(SQ002)

14A. In terms of a TAXI generally how satisfied were you with the following? [Appearance and personal hygiene of the Driver]





Field summary for PageFour14A(SQ003)

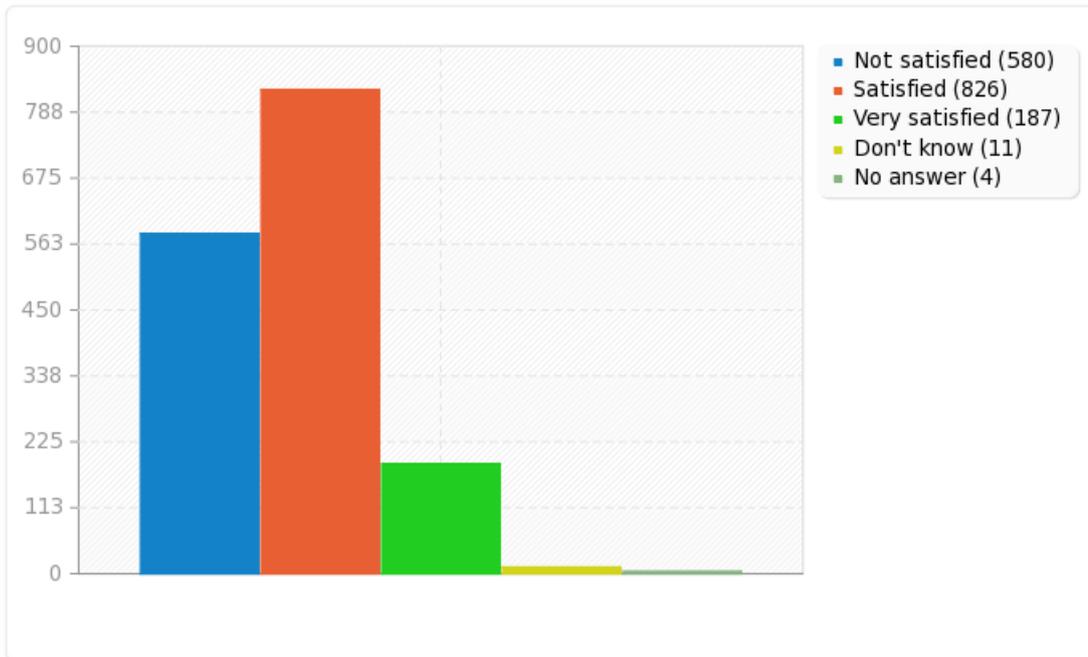
14A. In terms of a TAXI generally how satisfied were you with the following? [The driver's driving skills]

Answer	Count	Percentage
Not satisfied (A1)	580	36.07%
Satisfied (A2)	826	51.37%
Very satisfied (A3)	187	11.63%
Don't know (A4)	11	0.68%
No answer	4	0.25%



Field summary for PageFour14A(SQ003)

14A. In terms of a TAXI generally how satisfied were you with the following? [The driver's driving skills]





Field summary for PageFour14A(SQ004)

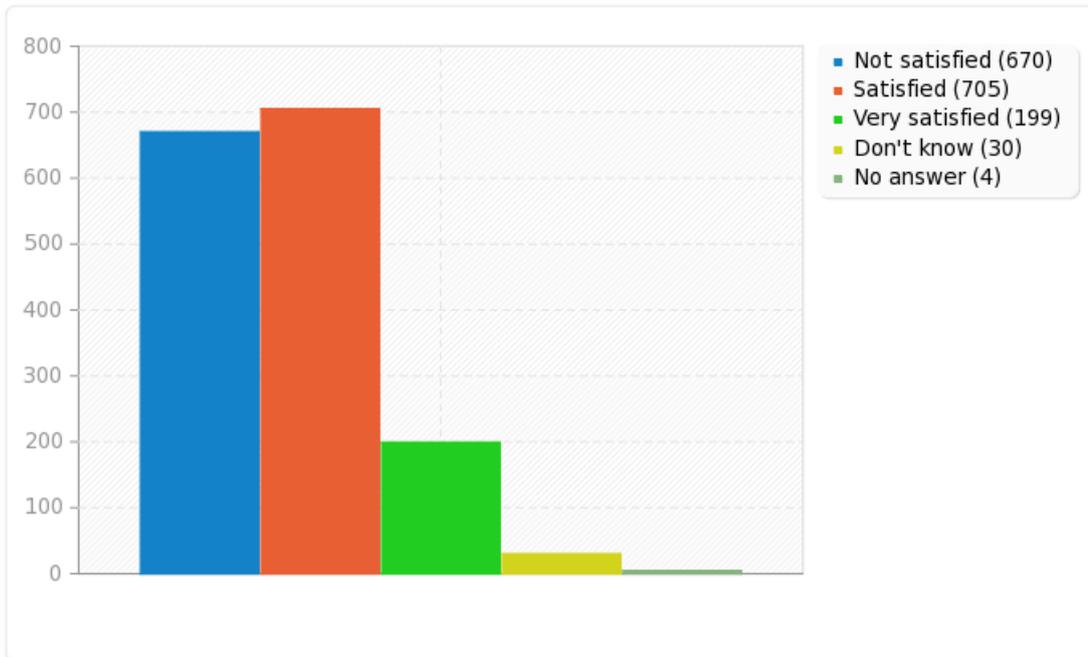
14A. In terms of a TAXI generally how satisfied were you with the following? [The driver's knowledge of routes or streets]

Answer	Count	Percentage
Not satisfied (A1)	670	41.67%
Satisfied (A2)	705	43.84%
Very satisfied (A3)	199	12.38%
Don't know (A4)	30	1.87%
No answer	4	0.25%



Field summary for PageFour14A(SQ004)

14A. In terms of a TAXI generally how satisfied were you with the following? [The driver's knowledge of routes or streets]





Field summary for PageFour14A(SQ005)

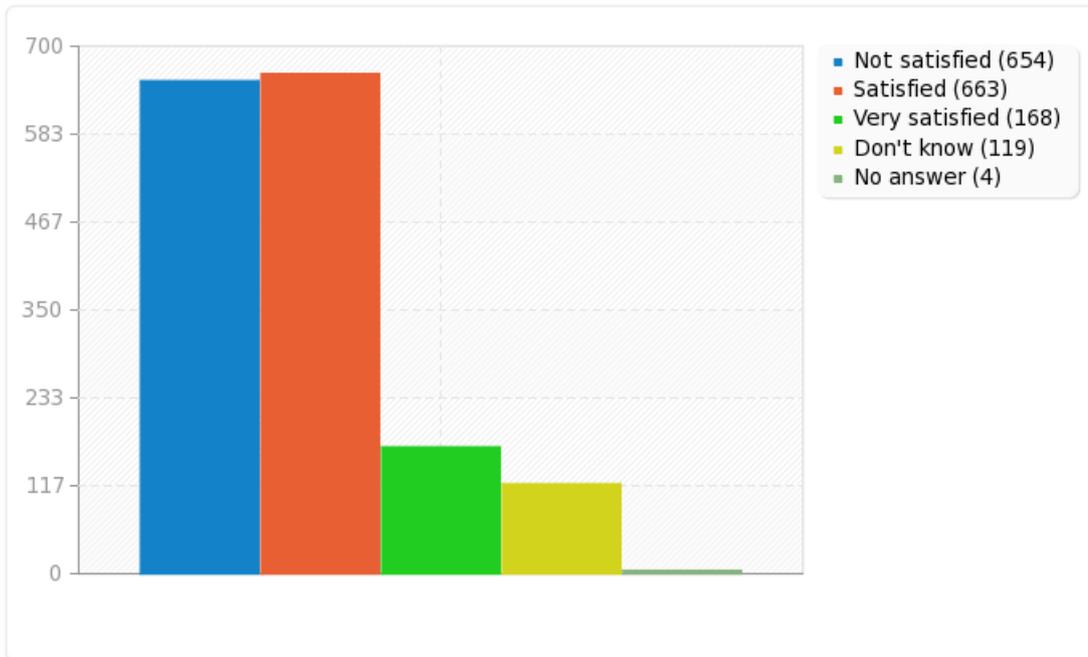
14A. In terms of a TAXI generally how satisfied were you with the following? [The drivers ability to take the cheapest route to where I wanted to go]

Answer	Count	Percentage
Not satisfied (A1)	654	40.67%
Satisfied (A2)	663	41.23%
Very satisfied (A3)	168	10.45%
Don't know (A4)	119	7.40%
No answer	4	0.25%



Field summary for PageFour14A(SQ005)

14A. In terms of a TAXI generally how satisfied were you with the following? [The drivers ability to take the cheapest route to where I wanted to go]





Field summary for PageFour14A(SQ006)

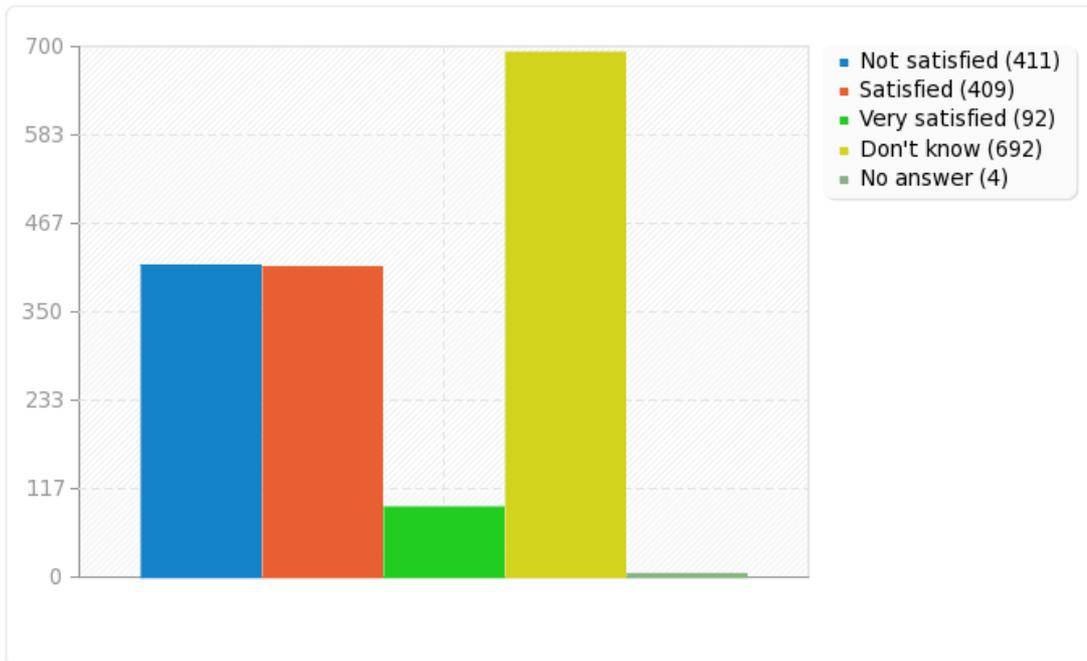
14A. In terms of a TAXI generally how satisfied were you with the following? [Drivers knowledge of tourist places and events]

Answer	Count	Percentage
Not satisfied (A1)	411	25.56%
Satisfied (A2)	409	25.44%
Very satisfied (A3)	92	5.72%
Don't know (A4)	692	43.03%
No answer	4	0.25%



Field summary for PageFour14A(SQ006)

14A. In terms of a TAXI generally how satisfied were you with the following? [Drivers knowledge of tourist places and events]





Field summary for PageFour14A(SQ007)

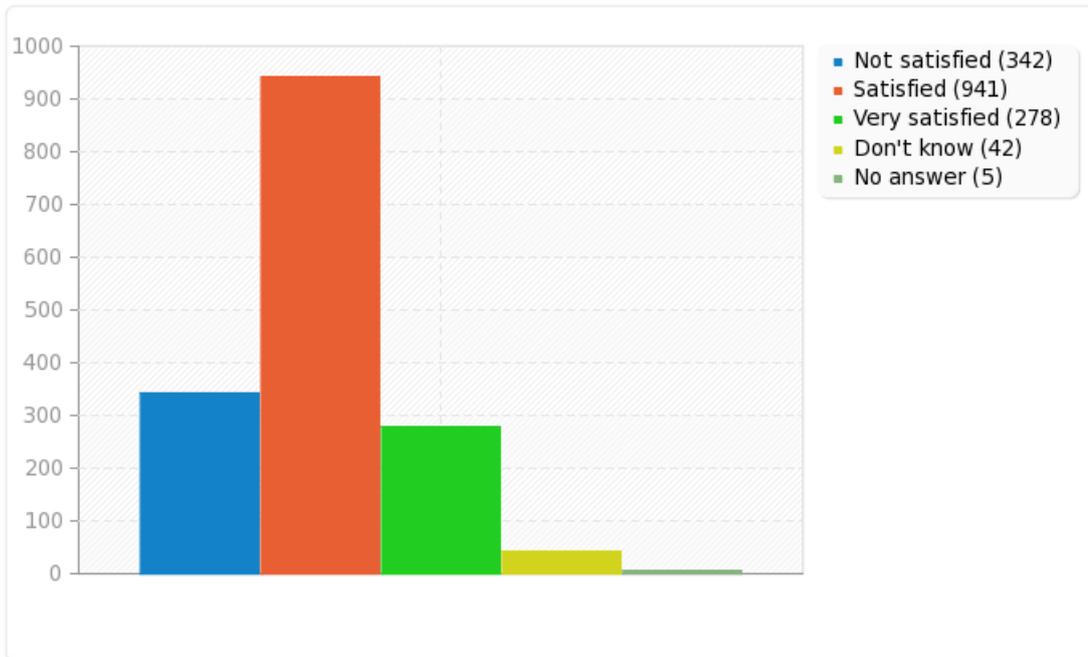
14A. In terms of a TAXI generally how satisfied were you with the following? [The timeliness of arrival]

Answer	Count	Percentage
Not satisfied (A1)	342	21.27%
Satisfied (A2)	941	58.52%
Very satisfied (A3)	278	17.29%
Don't know (A4)	42	2.61%
No answer	5	0.31%



Field summary for PageFour14A(SQ007)

14A. In terms of a TAXI generally how satisfied were you with the following? [The timeliness of arrival]





Field summary for PageFour14A(SQ008)

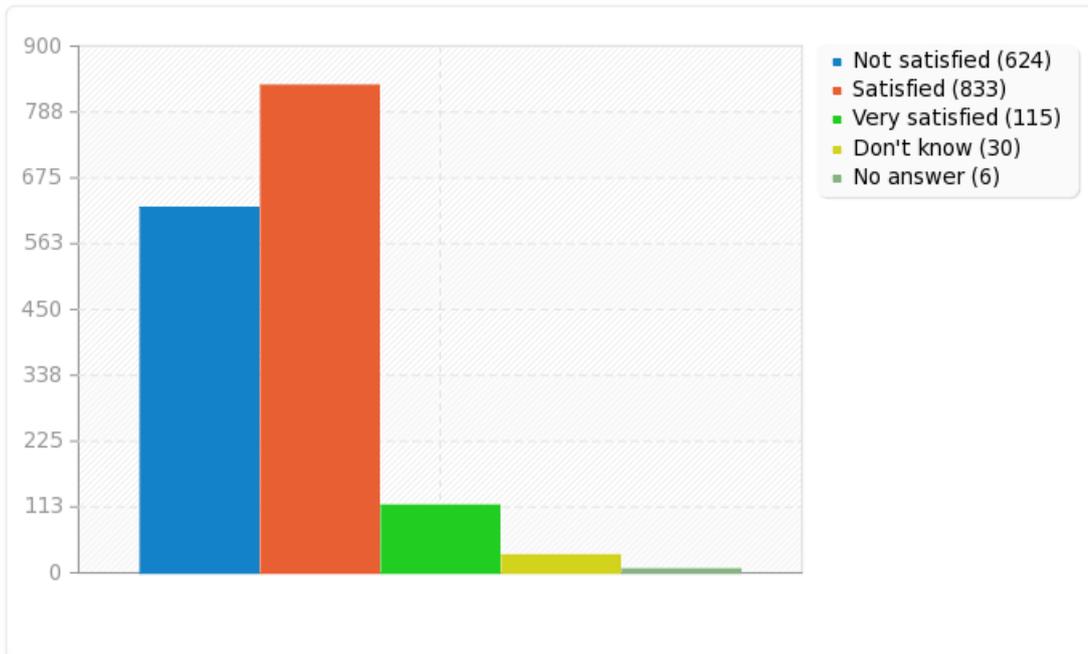
14A. In terms of a TAXI generally how satisfied were you with the following? [The cost of the trip (price)]

Answer	Count	Percentage
Not satisfied (A1)	624	38.81%
Satisfied (A2)	833	51.80%
Very satisfied (A3)	115	7.15%
Don't know (A4)	30	1.87%
No answer	6	0.37%



Field summary for PageFour14A(SQ008)

14A. In terms of a TAXI generally how satisfied were you with the following? [The cost of the trip (price)]





Field summary for PageFour14A(SQ009)

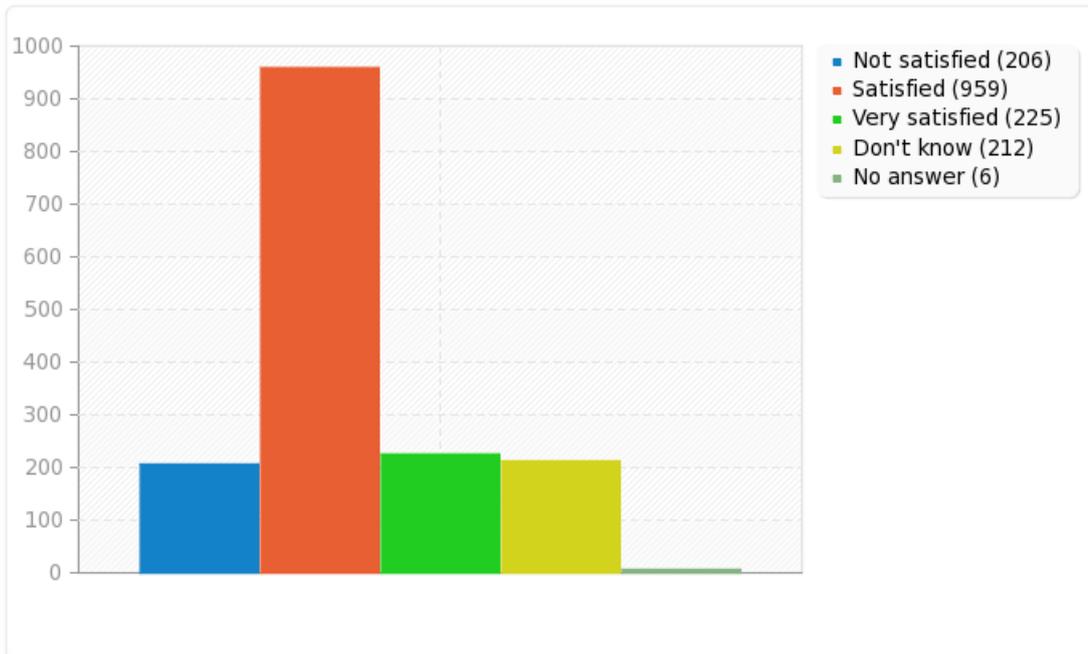
14A. In terms of a TAXI generally how satisfied were you with the following? [Payment (eg EFTPOS was working, driver wanted cash)]

Answer	Count	Percentage
Not satisfied (A1)	206	12.81%
Satisfied (A2)	959	59.64%
Very satisfied (A3)	225	13.99%
Don't know (A4)	212	13.18%
No answer	6	0.37%



Field summary for PageFour14A(SQ009)

14A. In terms of a TAXI generally how satisfied were you with the following? [Payment (eg EFTPOS was working, driver wanted cash)]





Field summary for PageFour14B(SQ001)

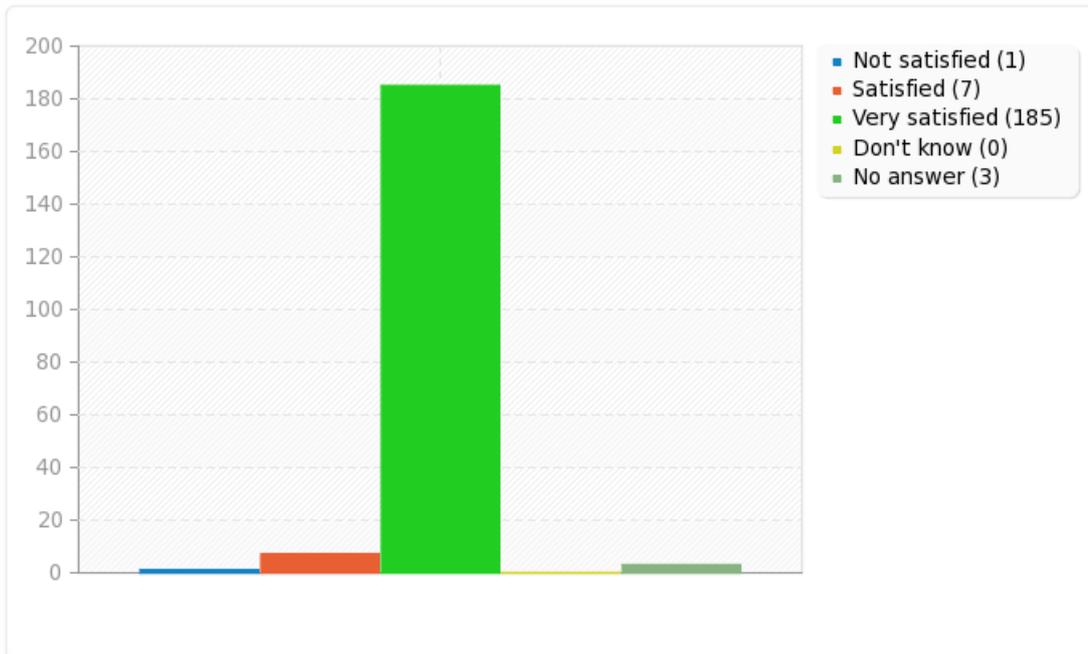
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [Condition of the Car (clean, undamaged)]

Answer	Count	Percentage
Not satisfied (A1)	1	0.51%
Satisfied (A2)	7	3.57%
Very satisfied (A3)	185	94.39%
Don't know (A4)	0	0.00%
No answer	3	1.53%



Field summary for PageFour14B(SQ001)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [Condition of the Car (clean, undamaged)]





Field summary for PageFour14B(SQ002)

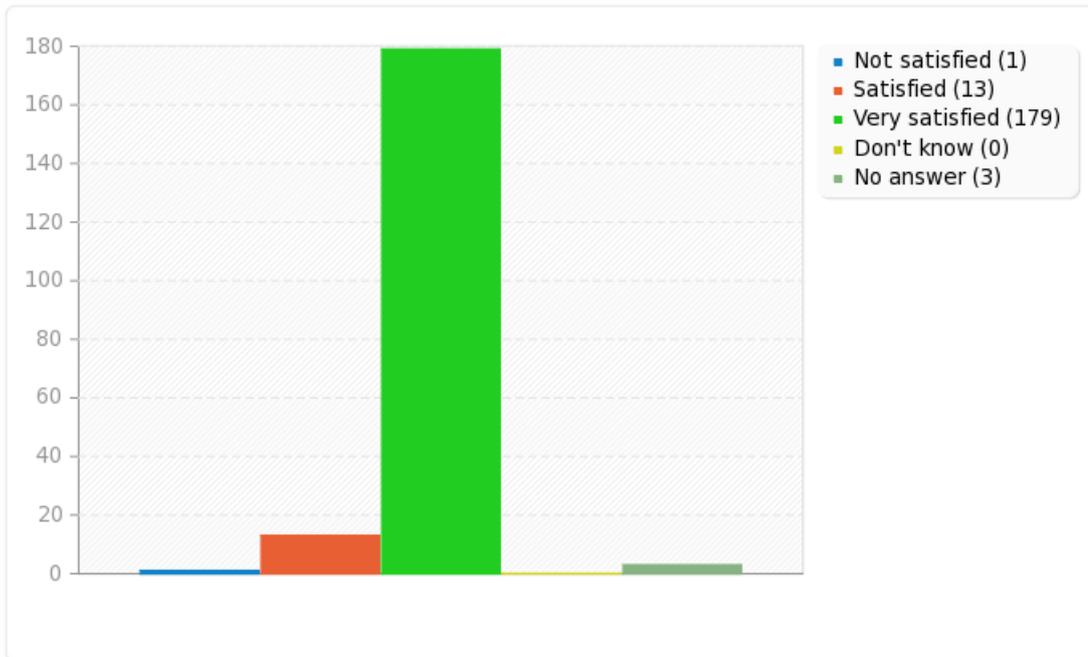
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [Appearance and personal hygiene of the Driver]

Answer	Count	Percentage
Not satisfied (A1)	1	0.51%
Satisfied (A2)	13	6.63%
Very satisfied (A3)	179	91.33%
Don't know (A4)	0	0.00%
No answer	3	1.53%



Field summary for PageFour14B(SQ002)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [Appearance and personal hygiene of the Driver]





Field summary for PageFour14B(SQ003)

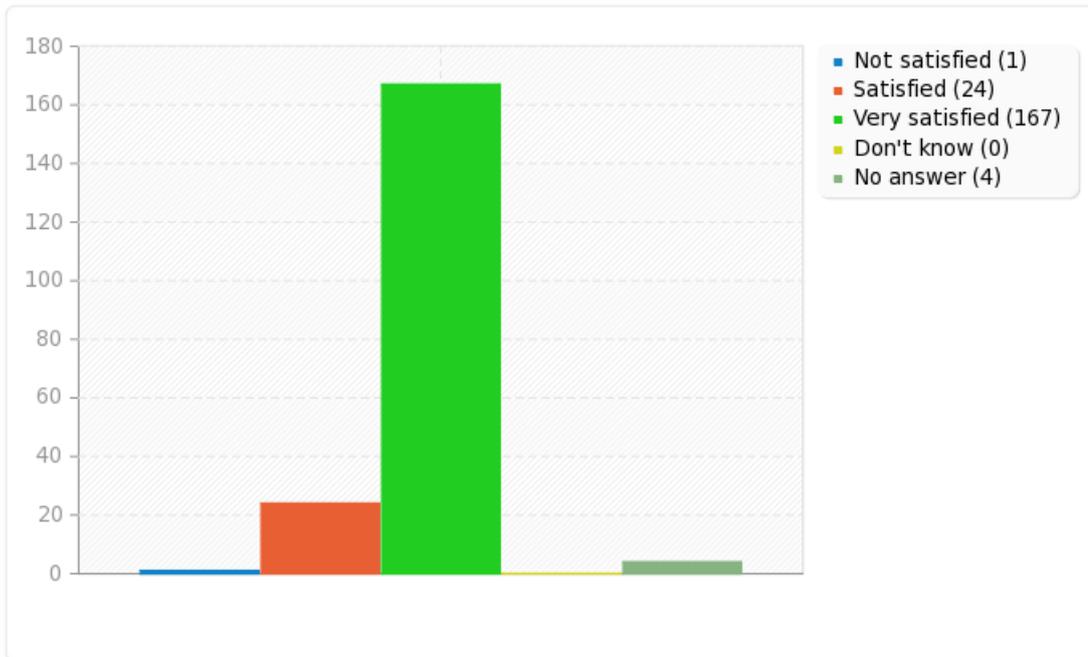
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The driver's driving skills]

Answer	Count	Percentage
Not satisfied (A1)	1	0.51%
Satisfied (A2)	24	12.24%
Very satisfied (A3)	167	85.20%
Don't know (A4)	0	0.00%
No answer	4	2.04%



Field summary for PageFour14B(SQ003)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The driver's driving skills]





Field summary for PageFour14B(SQ004)

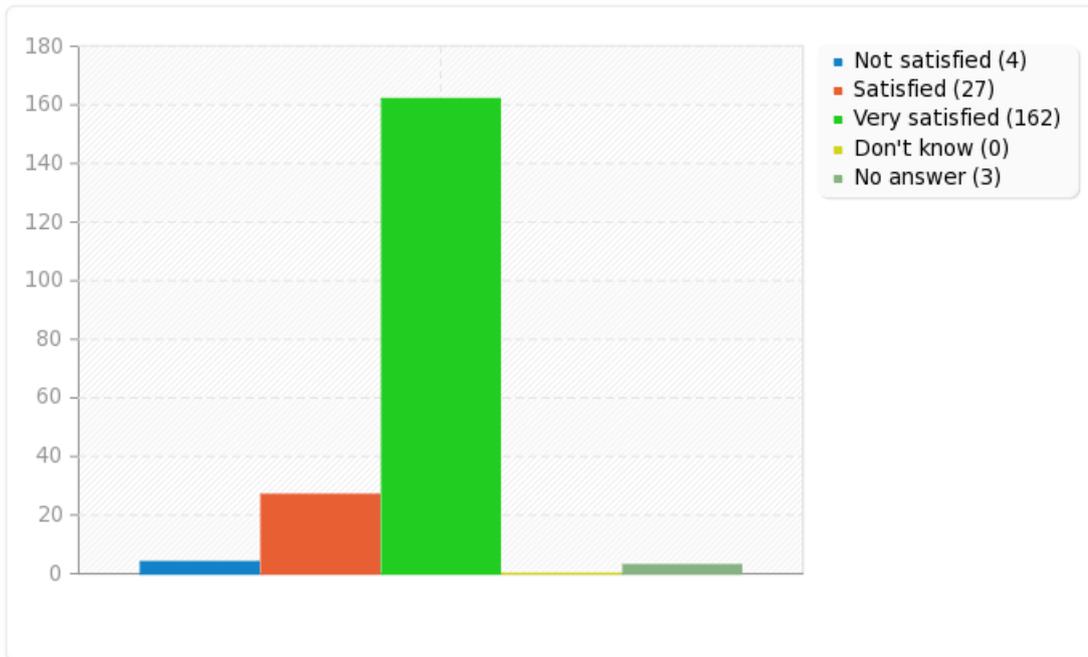
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The driver's knowledge of routes or streets]

Answer	Count	Percentage
Not satisfied (A1)	4	2.04%
Satisfied (A2)	27	13.78%
Very satisfied (A3)	162	82.65%
Don't know (A4)	0	0.00%
No answer	3	1.53%



Field summary for PageFour14B(SQ004)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The driver's knowledge of routes or streets]





Field summary for PageFour14B(SQ005)

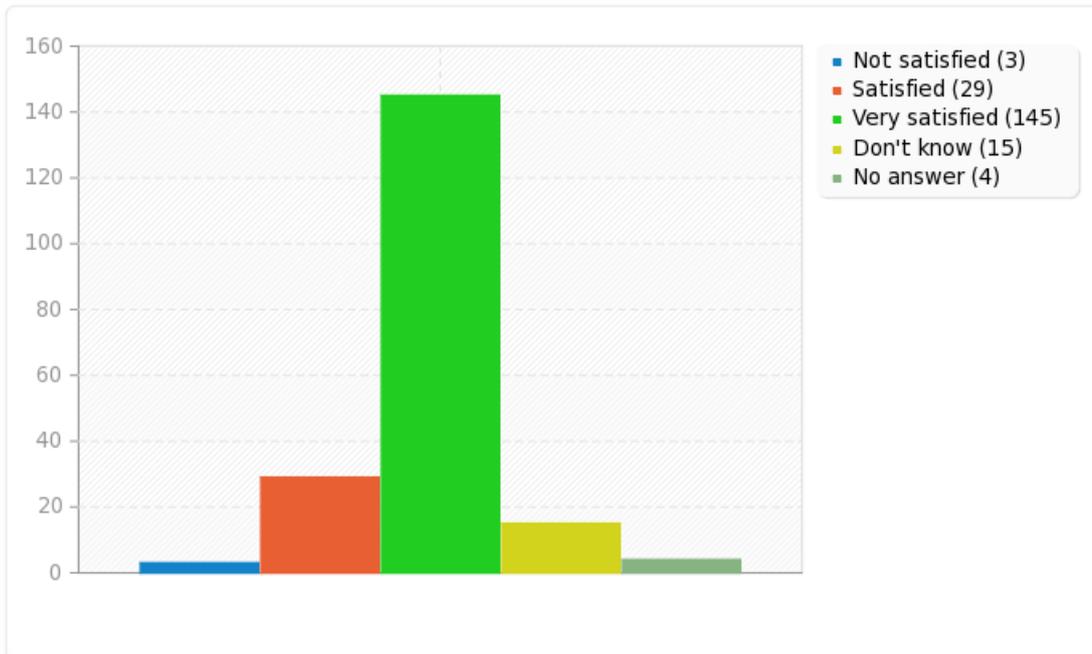
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The drivers ability to take the cheapest route to where I wanted to go]

Answer	Count	Percentage
Not satisfied (A1)	3	1.53%
Satisfied (A2)	29	14.80%
Very satisfied (A3)	145	73.98%
Don't know (A4)	15	7.65%
No answer	4	2.04%



Field summary for PageFour14B(SQ005)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The drivers ability to take the cheapest route to where I wanted to go]





Field summary for PageFour14B(SQ006)

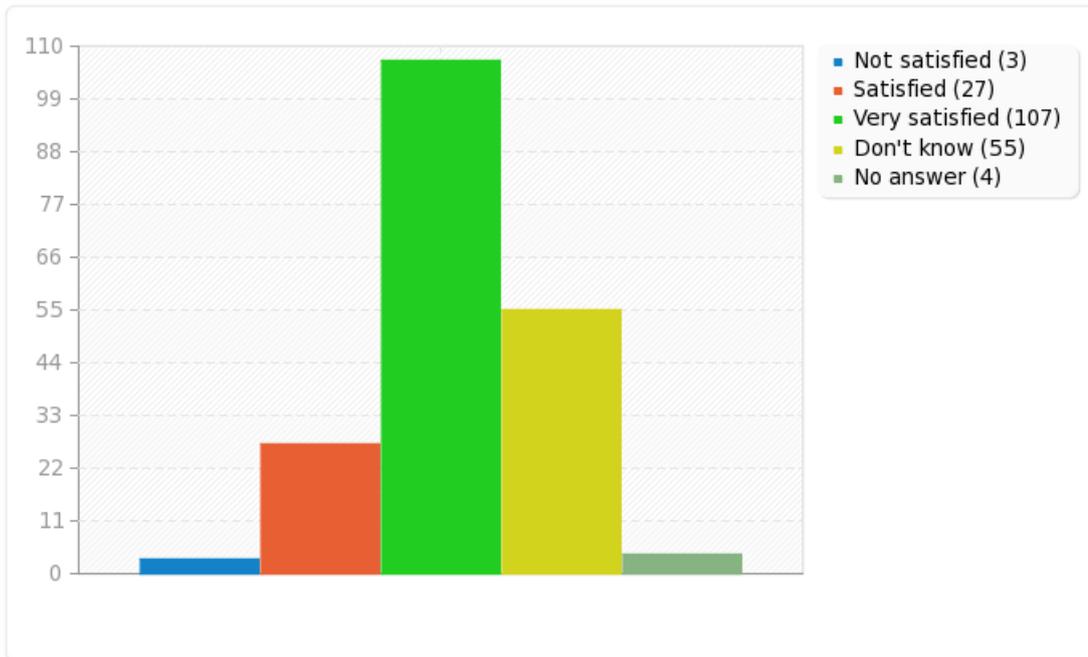
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [Drivers knowledge of tourist places and events]

Answer	Count	Percentage
Not satisfied (A1)	3	1.53%
Satisfied (A2)	27	13.78%
Very satisfied (A3)	107	54.59%
Don't know (A4)	55	28.06%
No answer	4	2.04%



Field summary for PageFour14B(SQ006)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [Drivers knowledge of tourist places and events]





Field summary for PageFour14B(SQ007)

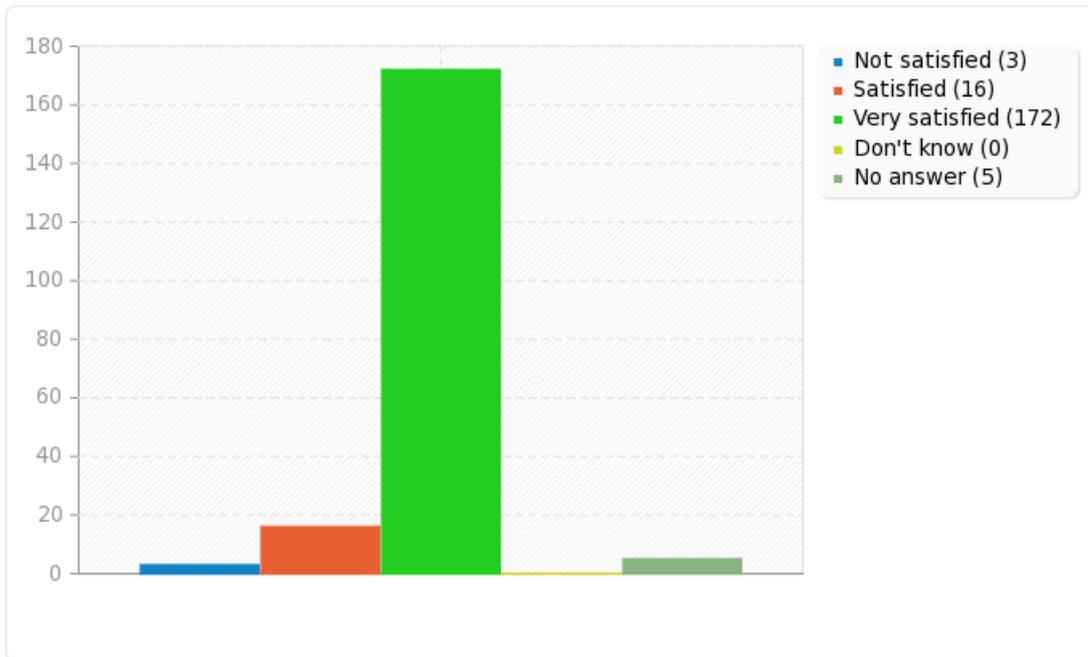
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The timeliness of arrival]

Answer	Count	Percentage
Not satisfied (A1)	3	1.53%
Satisfied (A2)	16	8.16%
Very satisfied (A3)	172	87.76%
Don't know (A4)	0	0.00%
No answer	5	2.55%



Field summary for PageFour14B(SQ007)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The timeliness of arrival]





Field summary for PageFour14B(SQ008)

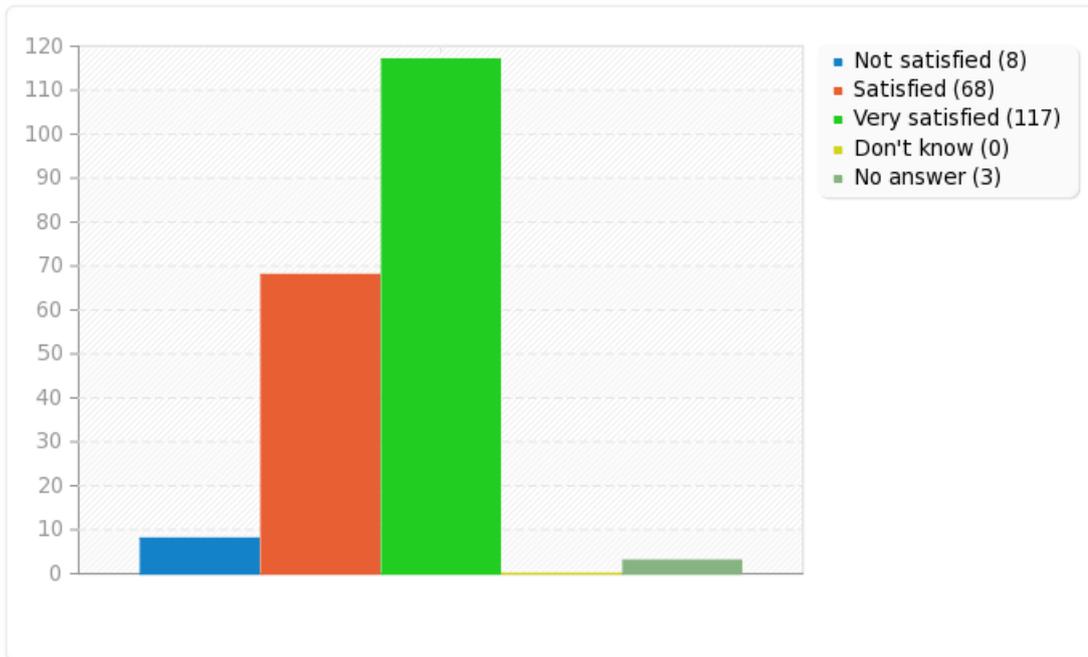
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The cost of the trip (price)]

Answer	Count	Percentage
Not satisfied (A1)	8	4.08%
Satisfied (A2)	68	34.69%
Very satisfied (A3)	117	59.69%
Don't know (A4)	0	0.00%
No answer	3	1.53%



Field summary for PageFour14B(SQ008)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [The cost of the trip (price)]





Field summary for PageFour14B(SQ009)

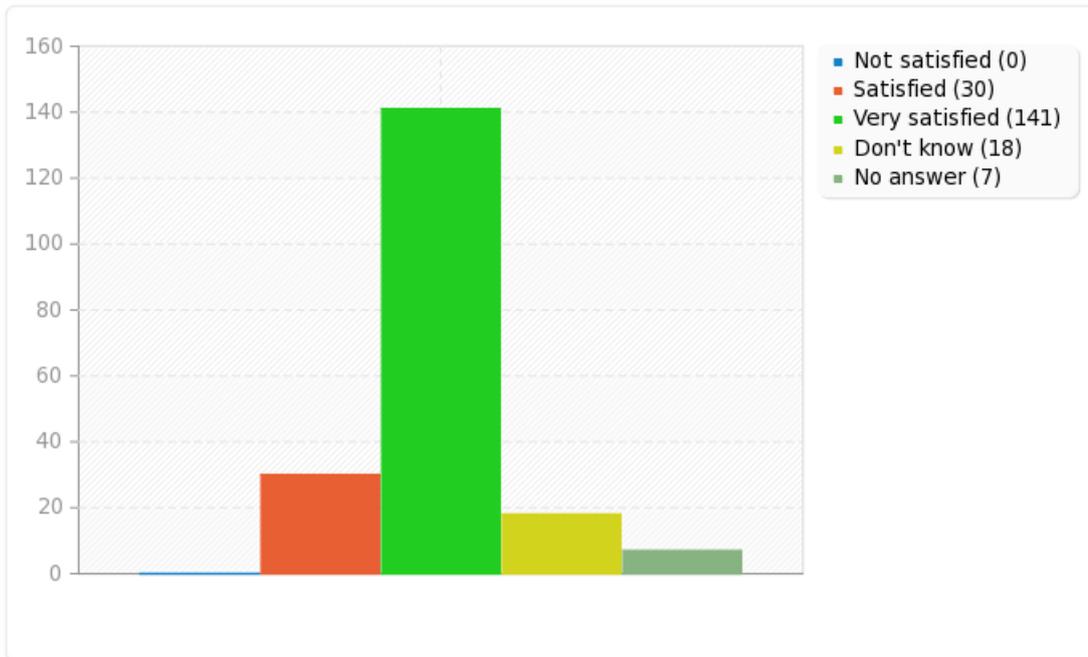
14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [Payment (eg EFTPOS was working, driver wanted cash)]

Answer	Count	Percentage
Not satisfied (A1)	0	0.00%
Satisfied (A2)	30	15.31%
Very satisfied (A3)	141	71.94%
Don't know (A4)	18	9.18%
No answer	7	3.57%



Field summary for PageFour14B(SQ009)

14B. In terms of a HIRE-CAR generally how satisfied were you with the following? [Payment (eg EFTPOS was working, driver wanted cash)]





Field summary for PageFourFifteen(SQ001)

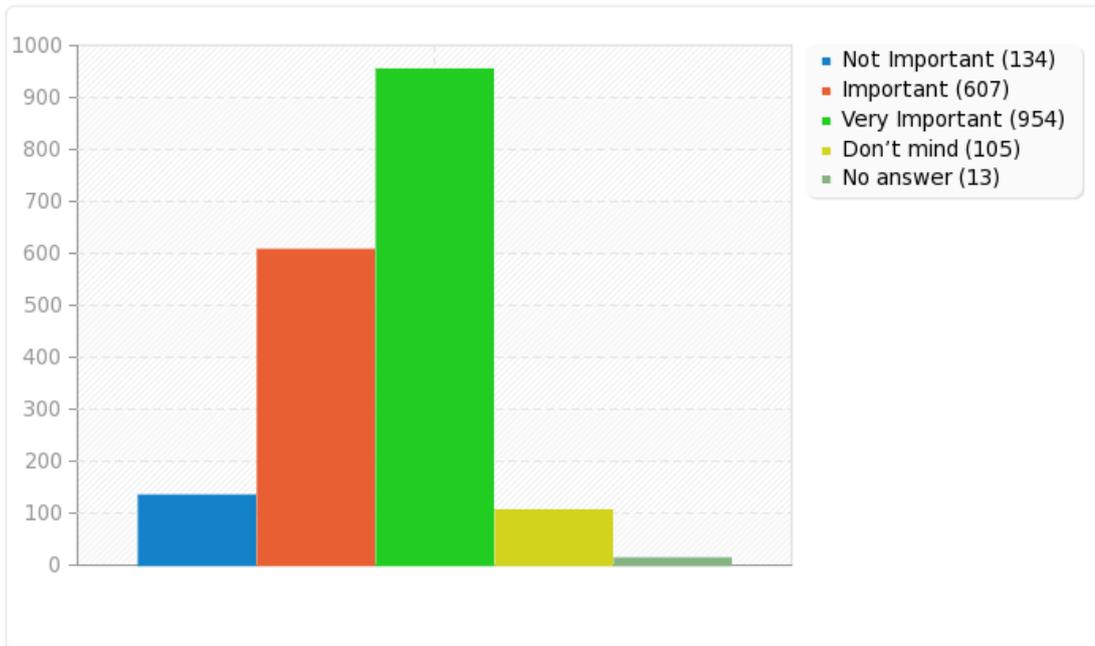
15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Tracking of the vehicle by police/company]

Answer	Count	Percentage
Not Important (A1)	134	7.39%
Important (A2)	607	33.48%
Very Important (A3)	954	52.62%
Don't mind (A4)	105	5.79%
No answer	13	0.72%



Field summary for PageFourFifteen(SQ001)

15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Tracking of the vehicle by police/company]





Field summary for PageFourFifteen(SQ002)

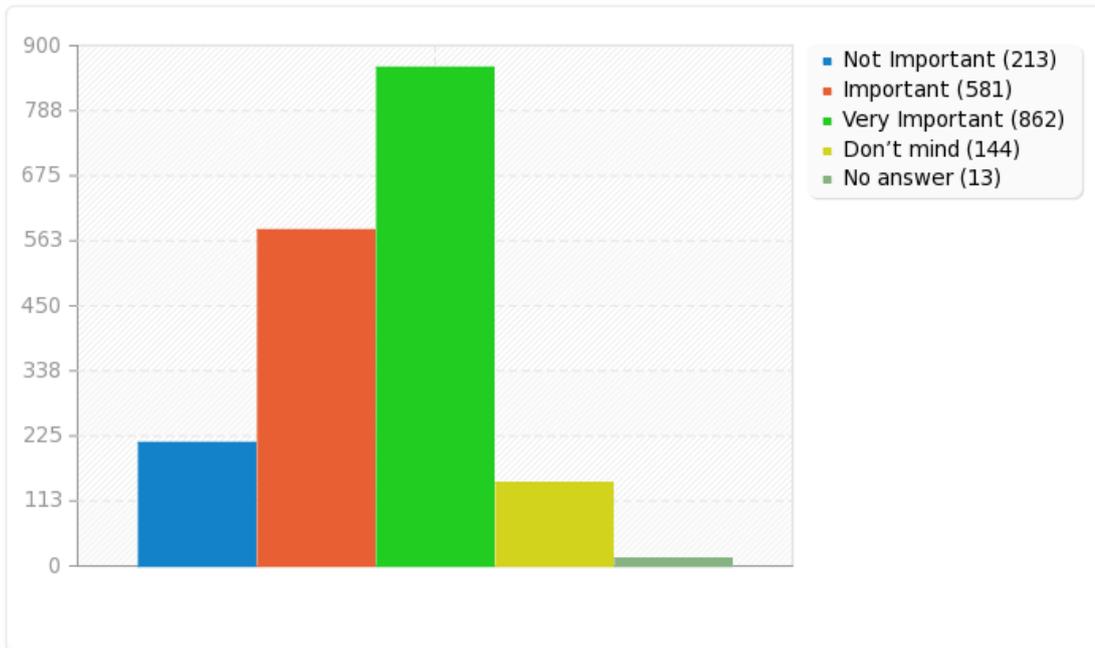
15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Continuous recording security cameras (pictures)]

Answer	Count	Percentage
Not Important (A1)	213	11.75%
Important (A2)	581	32.05%
Very Important (A3)	862	47.55%
Don't mind (A4)	144	7.94%
No answer	13	0.72%



Field summary for PageFourFifteen(SQ002)

15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Continuous recording security cameras (pictures)]





Field summary for PageFourFifteen(SQ003)

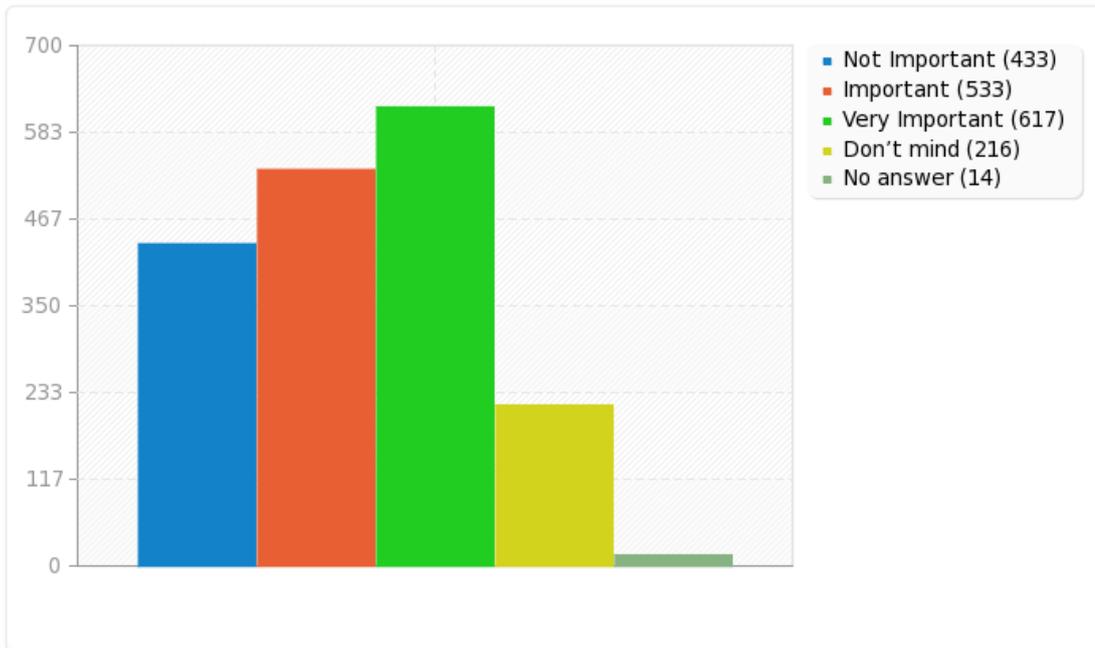
15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Audio recording (encrypted for privacy)]

Answer	Count	Percentage
Not Important (A1)	433	23.88%
Important (A2)	533	29.40%
Very Important (A3)	617	34.03%
Don't mind (A4)	216	11.91%
No answer	14	0.77%



Field summary for PageFourFifteen(SQ003)

15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Audio recording (encrypted for privacy)]





Field summary for PageFourFifteen(SQ004)

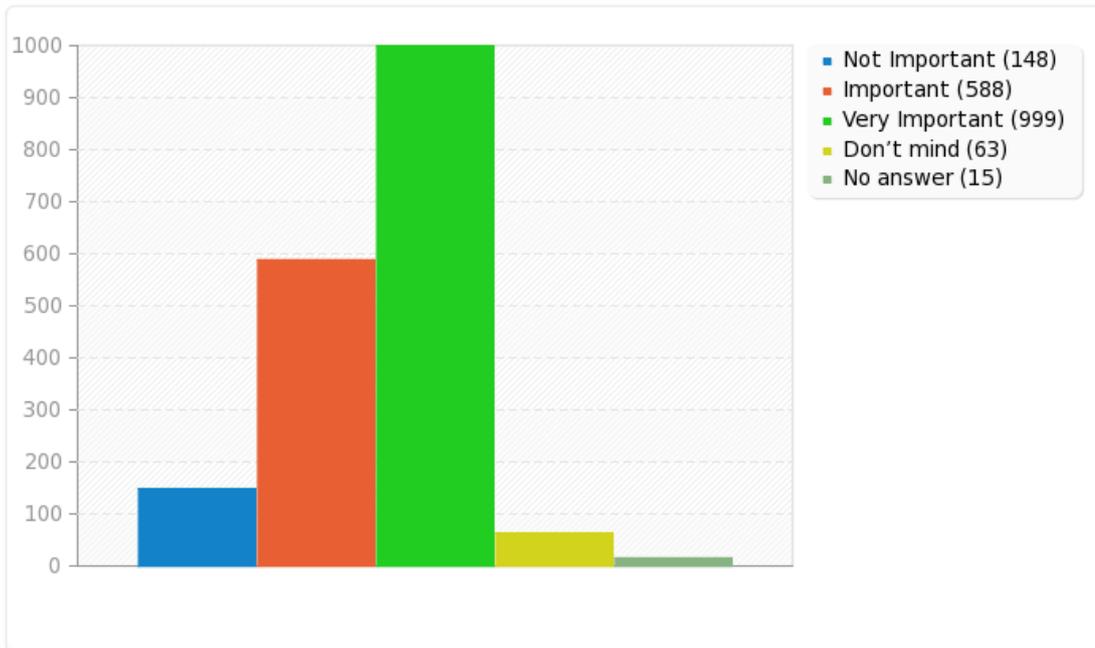
15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Signage or number plate to identify vehicle from street]

Answer	Count	Percentage
Not Important (A1)	148	8.16%
Important (A2)	588	32.43%
Very Important (A3)	999	55.10%
Don't mind (A4)	63	3.47%
No answer	15	0.83%



Field summary for PageFourFifteen(SQ004)

15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Signage or number plate to identify vehicle from street]





Field summary for PageFourFifteen(SQ005)

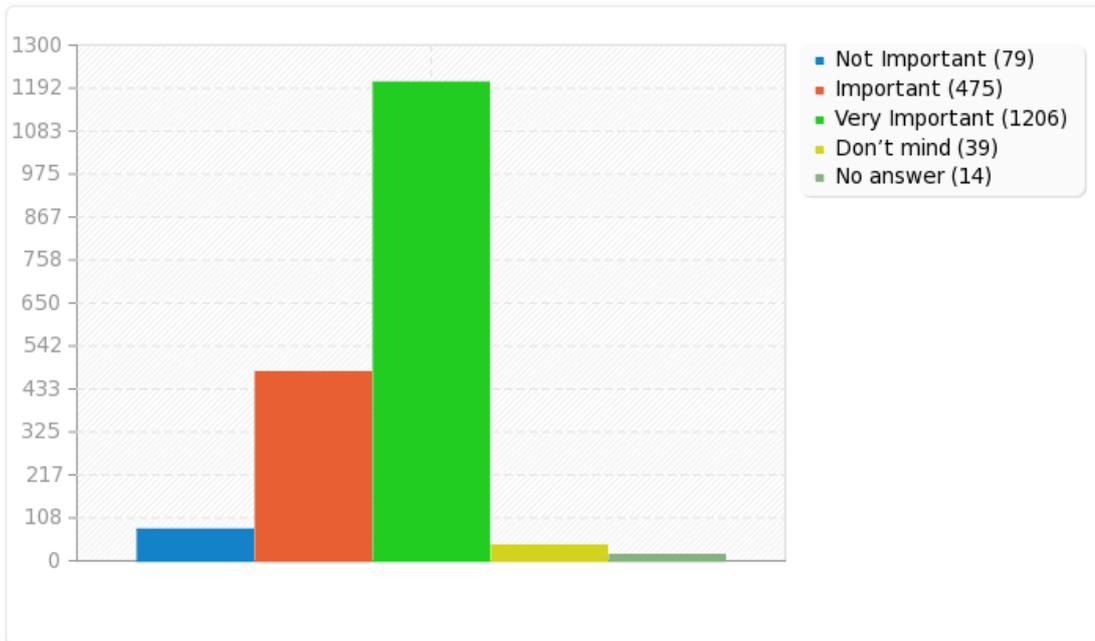
15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Identification of driver (badge or id card display)]

Answer	Count	Percentage
Not Important (A1)	79	4.36%
Important (A2)	475	26.20%
Very Important (A3)	1206	66.52%
Don't mind (A4)	39	2.15%
No answer	14	0.77%



Field summary for PageFourFifteen(SQ005)

15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Identification of driver (badge or id card display)]





Field summary for PageFourFifteen(SQ006)

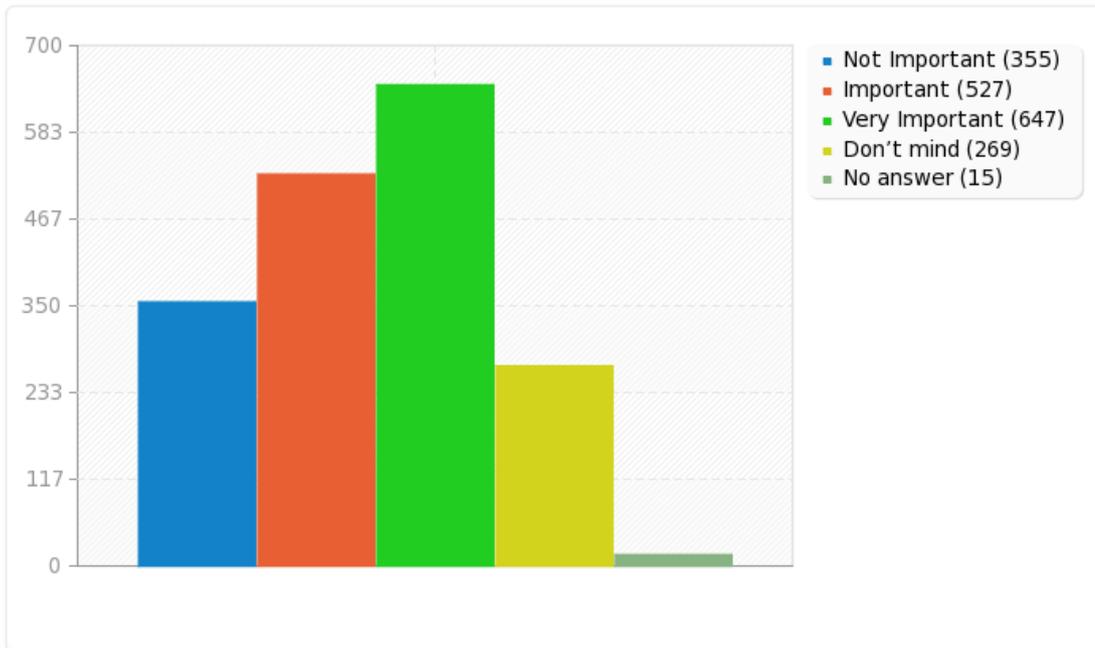
15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Identification of driver on your smartphone/ tablet]

Answer	Count	Percentage
Not Important (A1)	355	19.58%
Important (A2)	527	29.07%
Very Important (A3)	647	35.69%
Don't mind (A4)	269	14.84%
No answer	15	0.83%



Field summary for PageFourFifteen(SQ006)

15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Identification of driver on your smartphone/ tablet]





Field summary for PageFourFifteen(SQ007)

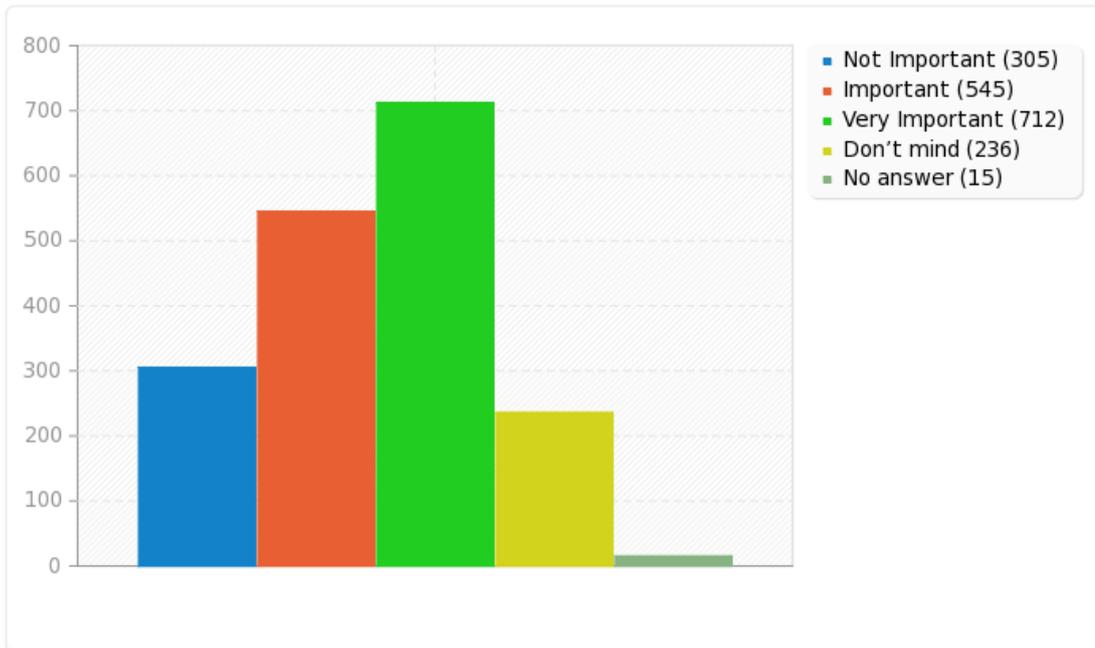
15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Tracking of vehicle on your smart phone / tablet app]

Answer	Count	Percentage
Not Important (A1)	305	16.82%
Important (A2)	545	30.06%
Very Important (A3)	712	39.27%
Don't mind (A4)	236	13.02%
No answer	15	0.83%



Field summary for PageFourFifteen(SQ007)

15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Tracking of vehicle on your smart phone / tablet app]





Field summary for PageFourFifteen(SQ008)

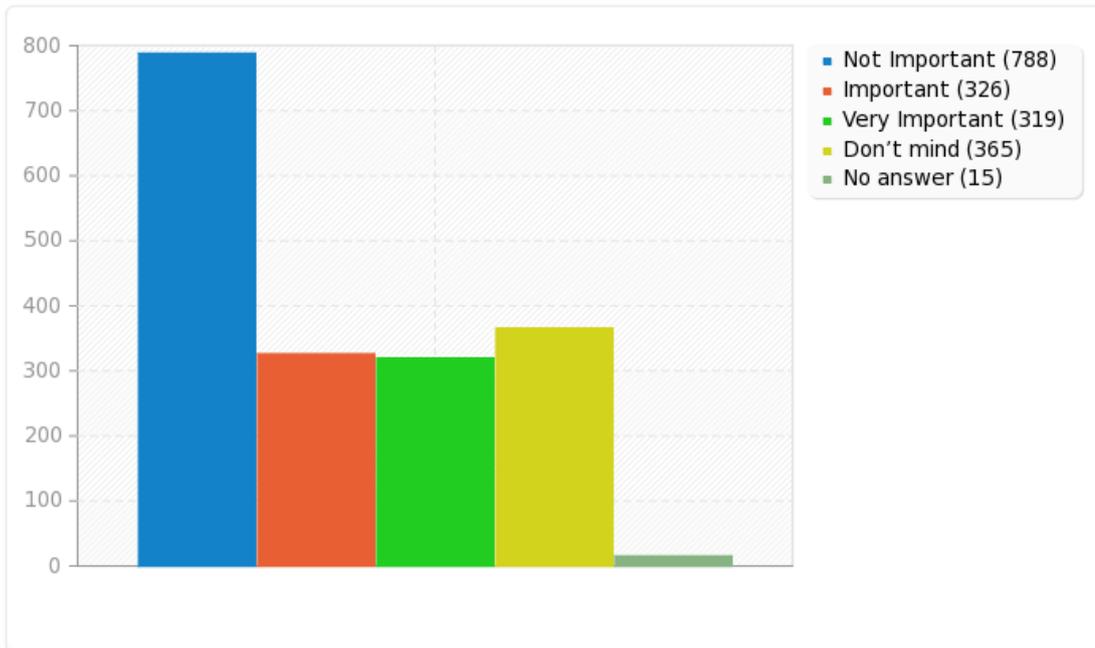
15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Barrier/shield between driver and passenger]

Answer	Count	Percentage
Not Important (A1)	788	43.46%
Important (A2)	326	17.98%
Very Important (A3)	319	17.60%
Don't mind (A4)	365	20.13%
No answer	15	0.83%



Field summary for PageFourFifteen(SQ008)

15. In terms of the SAFETY for you or a loved one in a taxi/hire car, how important are each of the following? [Barrier/shield between driver and passenger]





Field summary for PageFive16(SQ001)

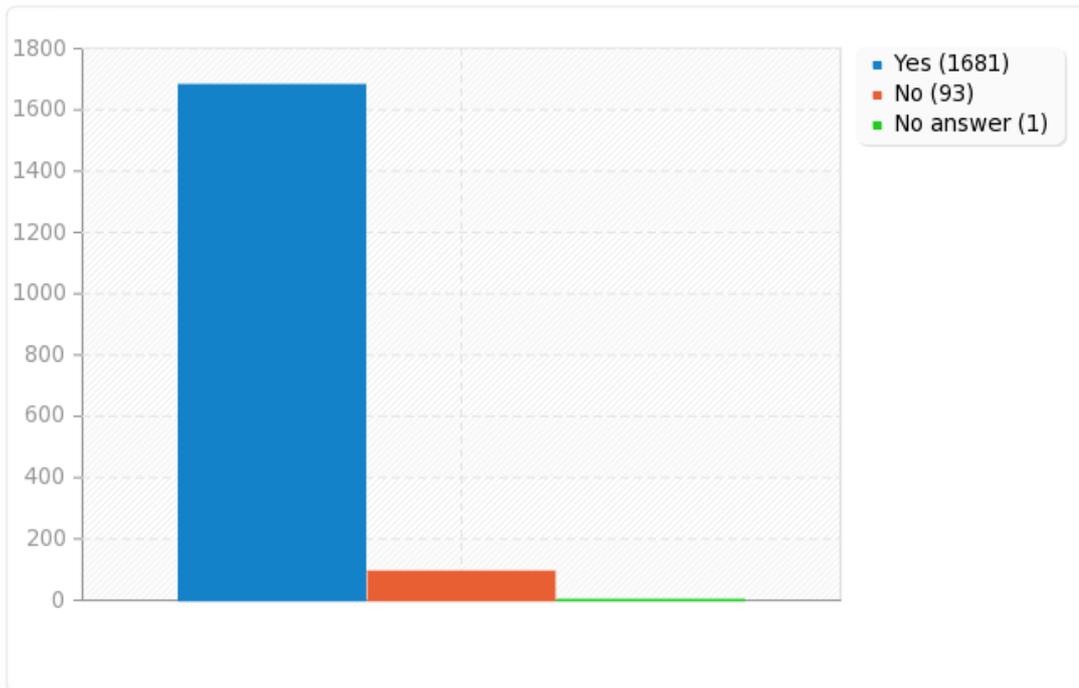
16. Do you believe the government should be able to automatically suspend someone who is charged with a serious criminal offence (i.e. rape, assault)? [Choose an option:]

Answer	Count	Percentage
Yes (A1)	1681	94.70%
No (A2)	93	5.24%
No answer	1	0.06%



Field summary for PageFive16(SQ001)

16. Do you believe the government should be able to automatically suspend someone who is charged with a serious criminal offence (i.e. rape, assault)? [Choose an option:]





Field summary for PageFive17(SQ001)

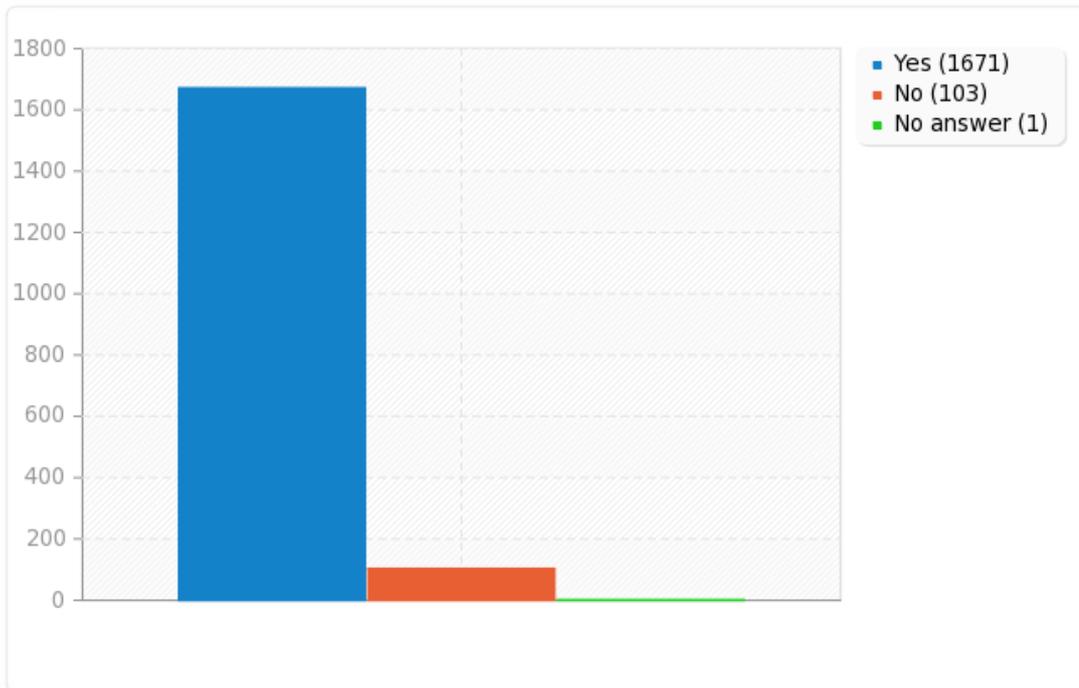
17. Do you believe that all taxi drivers must take a person regardless of distance they wish to travel (i.e. cannot refuse a short trip) [Choose an option:]

Answer	Count	Percentage
Yes (A1)	1671	94.14%
No (A2)	103	5.80%
No answer	1	0.06%



Field summary for PageFive17(SQ001)

17. Do you believe that all taxi drivers must take a person regardless of distance they wish to travel (i.e. cannot refuse a short trip) [Choose an option:]





Field summary for PageFive18(SQ001)

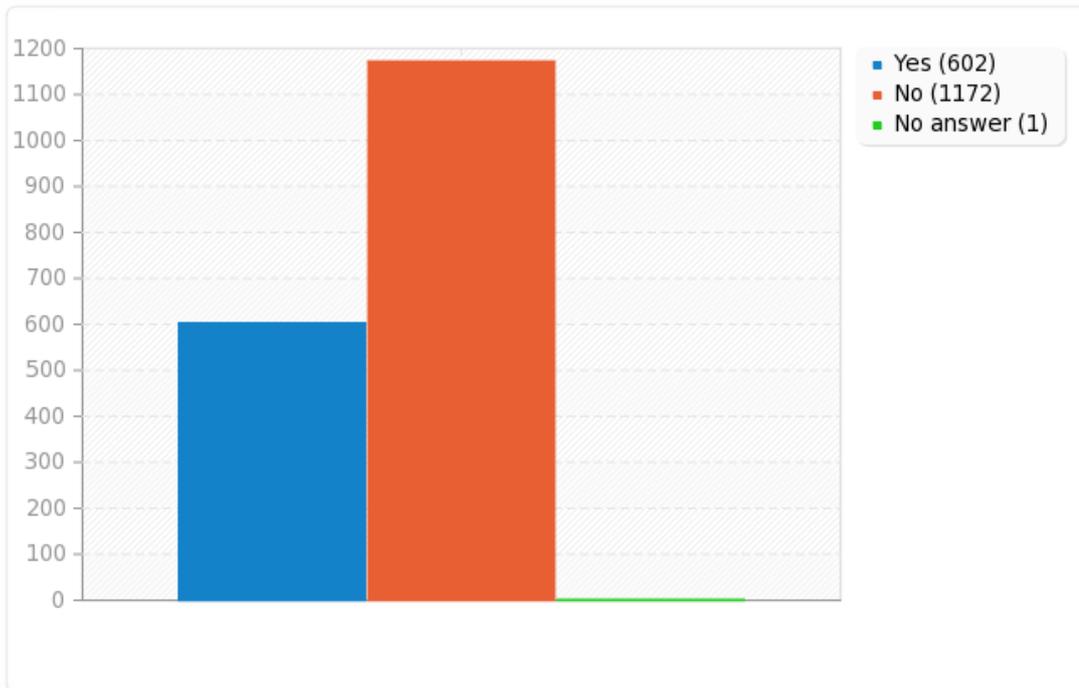
18. Would you pay more for taxi or hire-car service during periods of peak demand (New Years Eve, Mad March etc) when vehicles are hard to get and there is a long waiting time? [Taxi]

Answer	Count	Percentage
Yes (A1)	602	33.92%
No (A2)	1172	66.03%
No answer	1	0.06%



Field summary for PageFive18(SQ001)

18. Would you pay more for taxi or hire-car service during periods of peak demand (New Years Eve, Mad March etc) when vehicles are hard to get and there is a long waiting time? [Taxi]





Field summary for PageFive18(SQ002)

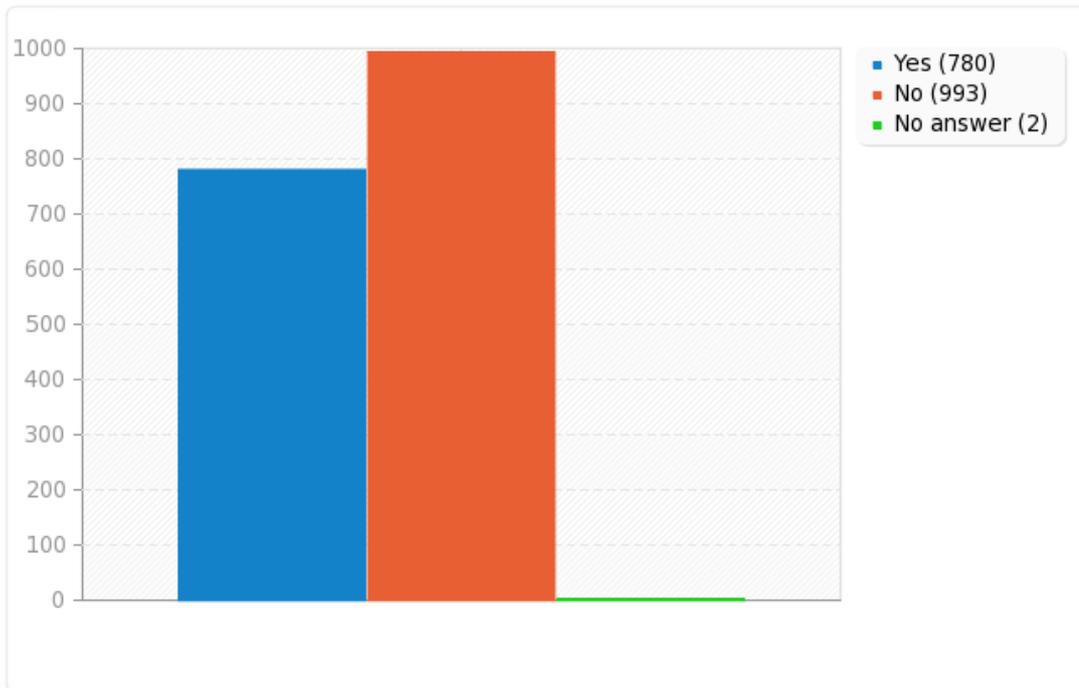
18. Would you pay more for taxi or hire-car service during periods of peak demand (New Years Eve, Mad March etc) when vehicles are hard to get and there is a long waiting time? [Hire-car]

Answer	Count	Percentage
Yes (A1)	780	43.94%
No (A2)	993	55.94%
No answer	2	0.11%



Field summary for PageFive18(SQ002)

18. Would you pay more for taxi or hire-car service during periods of peak demand (New Years Eve, Mad March etc) when vehicles are hard to get and there is a long waiting time? [Hire-car]





Field summary for PageFive19(SQ001)

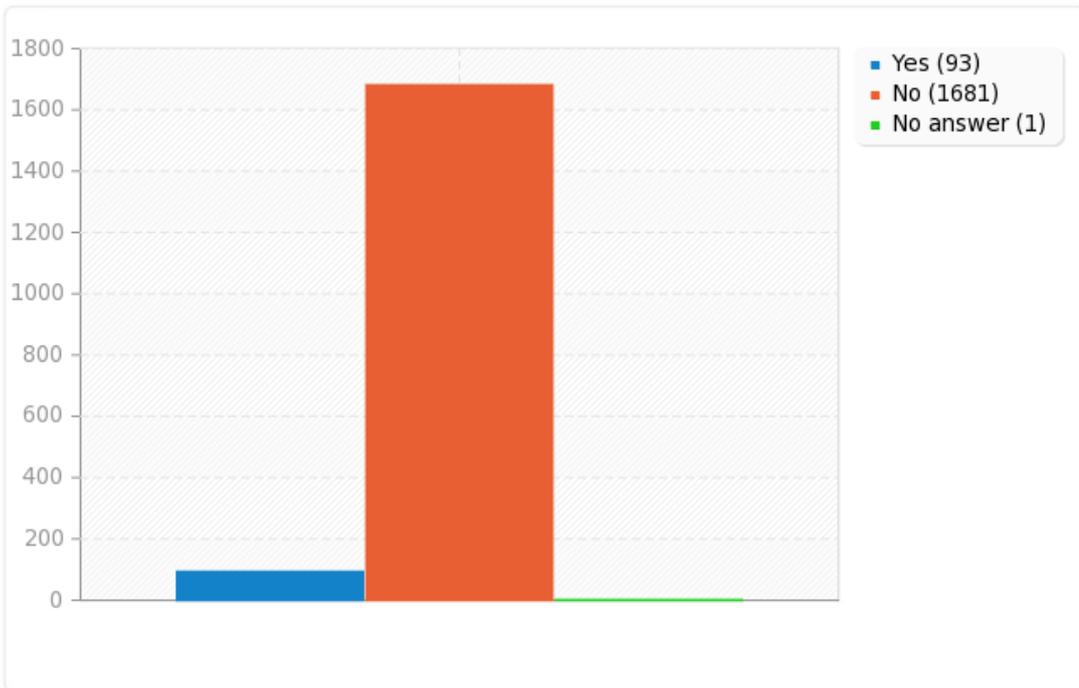
19. If you were in a queue (at a rank or prebooked) for a taxi/hire-car do you think someone should be able to jump the queue if they pay more? [Taxi]

Answer	Count	Percentage
Yes (A1)	93	5.24%
No (A2)	1681	94.70%
No answer	1	0.06%



Field summary for PageFive19(SQ001)

19. If you were in a queue (at a rank or prebooked) for a taxi/hire-car do you think someone should be able to jump the queue if they pay more? [Taxi]





Field summary for PageFive19(SQ002)

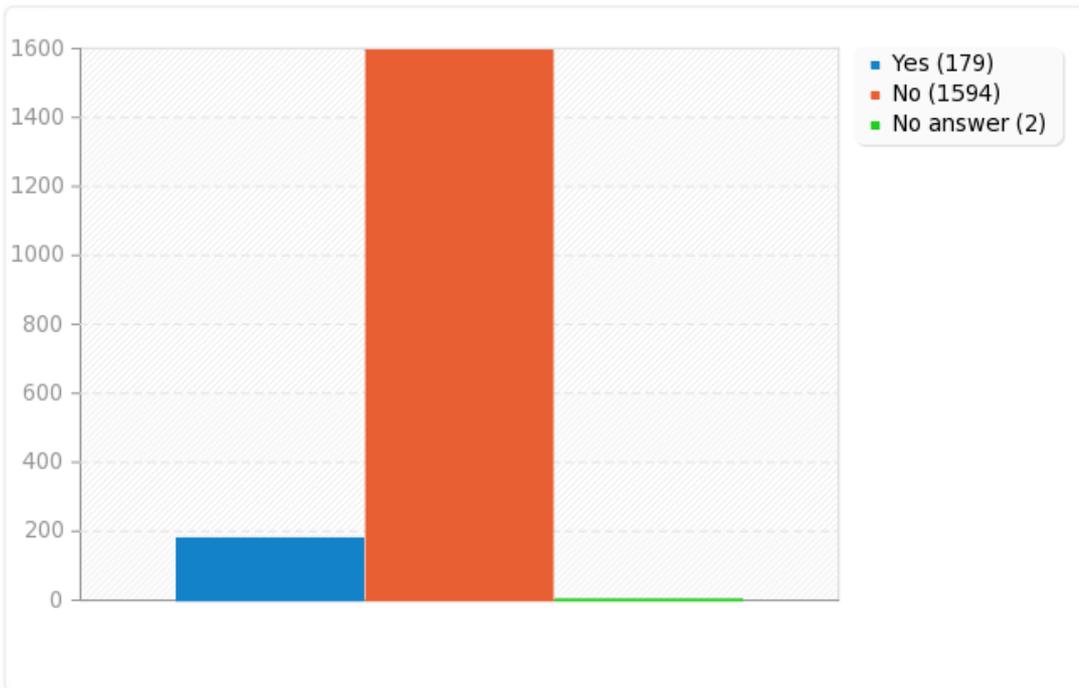
19. If you were in a queue (at a rank or prebooked) for a taxi/hire-car do you think someone should be able to jump the queue if they pay more? [Hire-car]

Answer	Count	Percentage
Yes (A1)	179	10.08%
No (A2)	1594	89.80%
No answer	2	0.11%



Field summary for PageFive19(SQ002)

19. If you were in a queue (at a rank or prebooked) for a taxi/hire-car do you think someone should be able to jump the queue if they pay more? [Hire-car]





Field summary for PageSix20(SQ001)

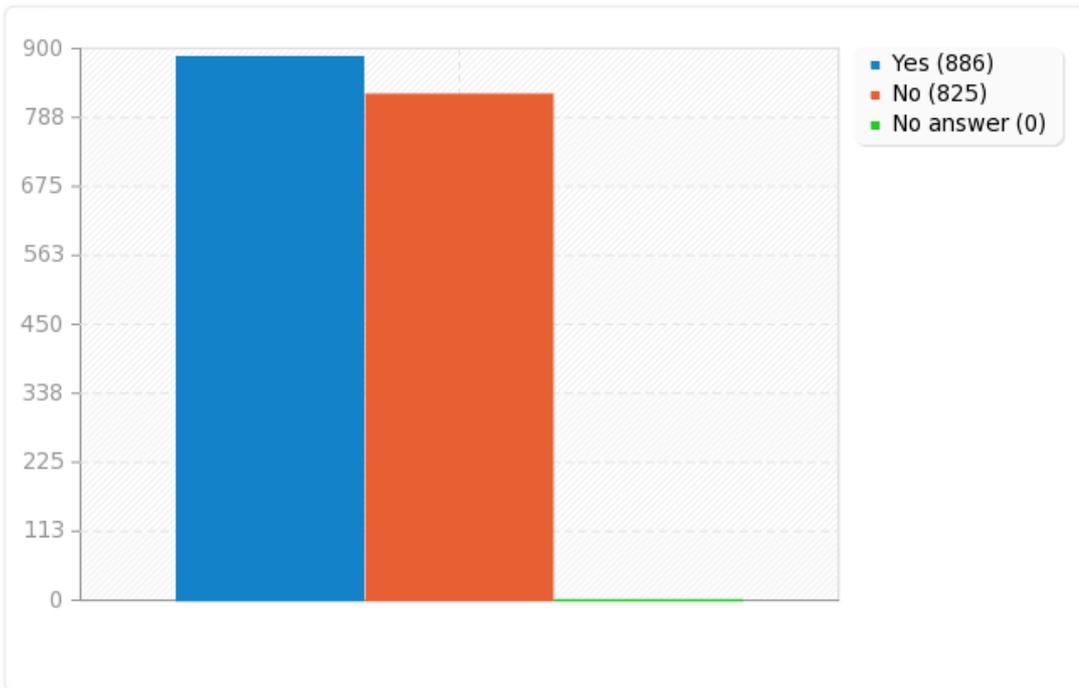
20. Are you happy to share a taxi/hire-car with other passengers who are unknown to you, when it is busy?
[Taxi]

Answer	Count	Percentage
Yes (A1)	886	51.78%
No (A2)	825	48.22%
No answer	0	0.00%



Field summary for PageSix20(SQ001)

20. Are you happy to share a taxi/hire-car with other passengers who are unknown to you, when it is busy?
[Taxi]





Field summary for PageSix20(SQ002)

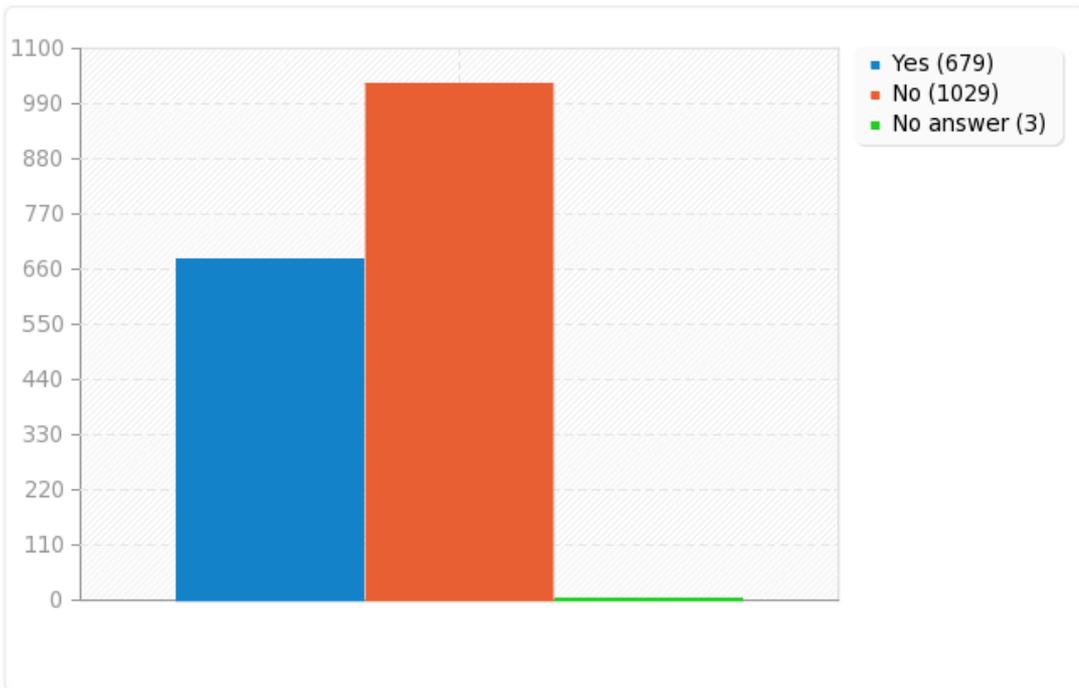
20. Are you happy to share a taxi/hire-car with other passengers who are unknown to you, when it is busy?
[Hire-car]

Answer	Count	Percentage
Yes (A1)	679	39.68%
No (A2)	1029	60.14%
No answer	3	0.18%



Field summary for PageSix20(SQ002)

20. Are you happy to share a taxi/hire-car with other passengers who are unknown to you, when it is busy?
[Hire-car]





Field summary for PageSix21(SQ001)

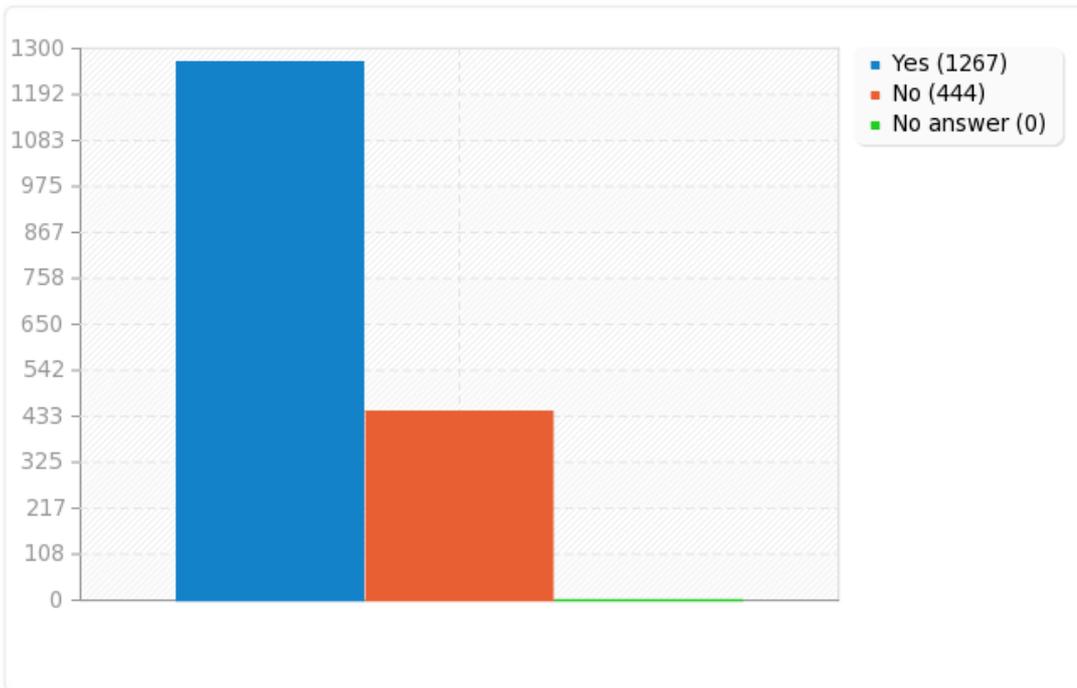
21. Currently there is no option to choose a smaller 'no frills' vehicle. Do you think you should be able to choose a smaller 'no frills' vehicle (i.e.smaller than a taxi)? [Choose an option:]

Answer	Count	Percentage
Yes (A1)	1267	74.05%
No (A2)	444	25.95%
No answer	0	0.00%



Field summary for PageSix21(SQ001)

21. Currently there is no option to choose a smaller 'no frills' vehicle. Do you think you should be able to choose a smaller 'no frills' vehicle (i.e.smaller than a taxi)? [Choose an option:]





Field summary for PageSix22(SQ001)

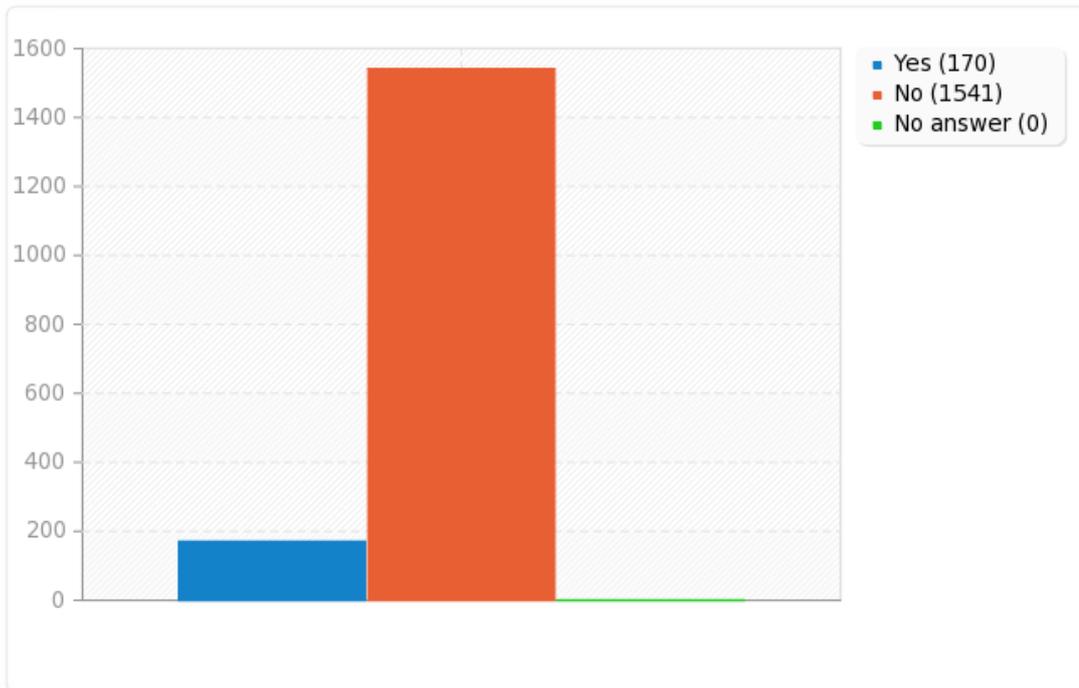
22. Are you currently registered or are you interested in being a driver with a rideshare service if approved in Adelaide? [Choose an option:]

Answer	Count	Percentage
Yes (A1)	170	9.94%
No (A2)	1541	90.06%
No answer	0	0.00%



Field summary for PageSix22(SQ001)

22. Are you currently registered or are you interested in being a driver with a rideshare service if approved in Adelaide? [Choose an option:]





Field summary for PageSixx23(SQ001)

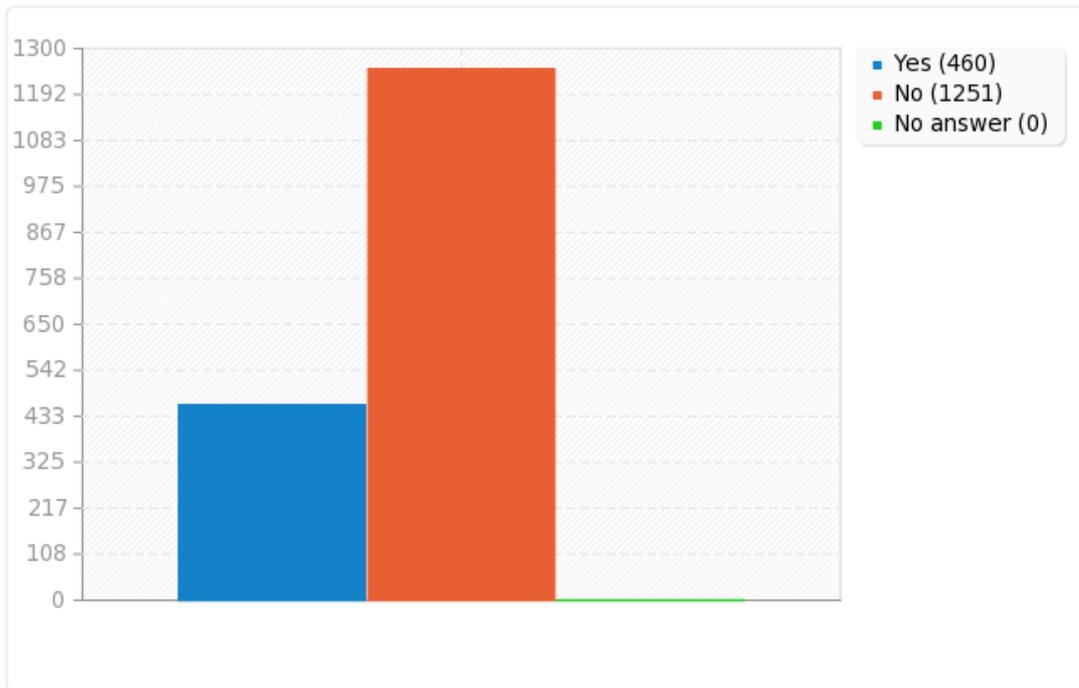
23. Would you pay extra for guaranteed on- time pick up service from a taxi? [Choose an option:]

Answer	Count	Percentage
Yes (A1)	460	26.88%
No (A2)	1251	73.12%
No answer	0	0.00%



Field summary for PageSixx23(SQ001)

23. Would you pay extra for guaranteed on- time pick up service from a taxi? [Choose an option:]





Field summary for PageSixx23A(SQ001)

23A: What amount do you believe is reasonable? [Choose an option:]

Answer	Count	Percentage
\$0 - \$5 (A1)	302	65.65%
\$5 - \$10 (A2)	129	28.04%
\$10 - \$20 (A3)	15	3.26%
\$20+ (A4)	2	0.43%
No answer	12	2.61%



Field summary for PageSixx23A(SQ001)

23A: What amount do you believe is reasonable? [Choose an option:]

