

Evaluation of Wheelchair Accessible Taxi Services

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Executive Summary

Many wheelchair users are highly dependent on taxi services. These users rely on taxis for their everyday travel much more than general taxi users, and use taxis for a wider variety of reasons than do taxi users from the general population. However, it has historically been difficult for them to access taxi services in Tasmania.

The introduction of wheelchair accessible taxis (WAT) into Tasmania is linked to the Commonwealth *Disability Discrimination Act 1992* (DDA). The DDA aims to eliminate discrimination, as far as possible, against people with disabilities, in a range of areas including the provision of services. Public transport, which includes taxi services, is a service covered by the DDA.

Prior to the introduction of WATs, special purpose cabs (SPCs) provided a “taxi-style” service to wheelchair dependent people. However, these vehicles were unable to operate as standard cabs and were typically lower quality vehicles than vehicles able to be used as WATs in Tasmania. It was often reported that these vehicles, of which there were approximately 20 across the State, were in such demand that users would have to book a week or so in advance in order to gain access to an SPC. Additionally, many users reported feeling unsafe or uncomfortable in these vehicles.

WAT licences were first issued in 2004 and subsequently in 2005. As a result of amendments to the *Taxi and Luxury Hire Car Industries Act 1995* designed to fulfil Tasmania’s obligations under the National Competition Policy, the Department of Infrastructure, Energy and Resources (DIER) releases new taxi licences every year. The number of licences made available is equivalent to five per cent of the number of licences currently on issue in each taxi of Tasmania’s 24 taxi areas, or one licence, whichever is the greater. Over the past two years, a total of 33 WAT licences have been made available, in lieu of standard perpetual licences, in the four major metropolitan taxi areas: Hobart, Launceston, Burnie and Devonport. The majority of these licences went to operators that do not operate standard cabs, but have links with radio rooms.

In recognition of the difficulties associated with using other forms of public transport, wheelchair-dependent users with a permanent disability are eligible for membership of the Government’s Transport Access Scheme (TAS). Amongst other benefits, TAS provides taxi fare concessions for those with disabilities through a voucher system. For those classified as “wheelchair reliant”, TAS pays for 60% of the passenger’s fare (to a maximum of \$30 per trip) when they travel in a WAT.

The focus of this report is to determine whether or not the level of service provided by WATs to wheelchair-dependent users is adequate, particularly in comparison to that provided by standard taxis to other members of the community. The methodology included:

- an analysis of TAS voucher data and depersonalised TAS taxi membership records;
- consultations with taxi industry representatives;
- consultations and a mail-out survey of advocacy groups; and
- a telephone survey of wheelchair reliant member of the TAS taxi scheme.

Since it’s the introduction of the TAS in 1991 TAS taxi membership has grown considerably, though growth has slowed in recent years. The growth in members classified as “wheelchair reliant” grew

in 2004 by 2.3%. At the end of September 2005 there were 2773 wheelchair-reliant members of the scheme.

Analysis of this membership however, has determined that a number may not in fact be dependent on wheelchairs. By the same token, there are many TAS taxi members who are not classified as being "wheelchair reliant", but have recently become dependent on a wheelchair, either with ageing or a deterioration of condition, and may now qualify for this classification. A review underway at the time of this consultancy into the current membership list is likely to reduce the number of wheelchair-reliant TAS taxi members.

The introduction of WATs into Tasmania from October 2004 has increased the options for transport for wheelchair-dependent people in Hobart, Launceston, Burnie and more recently, Devonport. By next year the number of wheelchair accessible vehicles operating will be double that of two years ago.

It is evident that younger wheelchair-dependent people use WATs more frequently, but very many more older people are using WATs than younger people and therefore account for the majority of trips. The average age of TAS taxi wheelchair-reliant members who joined the scheme in 2004 at the time of joining was 72 years of age, showing that many become wheelchair dependent due to ageing.

Most users of WATs, surveyed in October 2005, felt there had already been an improvement in service provided by wheelchair accessible taxis in all three regions where WATs were introduced.¹ In virtually every aspect of service, respondents to the survey reported that the service was the same or better than 18 months ago, with more reporting better in most regions for most service attributes. The improvements were also strongly emphasised by the consultations with advocacy groups with comments such as:

- "A quantum leap forward for disabled transport"
- "WATs have changed our lives"

Users and advocacy groups report that wheelchair-dependent people are "getting out more often" and increases in usage of these vehicles is evident in the three regions where WATs have already been introduced.

However, users and advocacy groups report that for the most part, WATs are still not as readily available as standard cabs, particularly at peak times of the day. Response times for WATs are also reportedly higher than standard cabs. The *Disability Standards for Accessible Public Transport 2002* require that response times for WATs are the same as for other taxis by 1 December 2007.

While usage of wheelchair accessible vehicles has grown, trips in standard cabs by wheelchair-reliant members of the TAS taxi scheme have not declined. Many wheelchair dependent people prefer to use standard cabs and are able to "transfer" from their wheelchair into them. This is substantiated by operators of standard taxis, which are still carrying a "significant" number of wheelchair-dependent passengers. Half of all wheelchair-endorsed TAS vouchers redeemed are from standard cabs.

¹ At the time of the user survey, there was no WAT operating in Devonport.

WAT operators and advocacy groups alike recognise that there is a need for a diverse range of vehicle types, so as to address the wide range of needs of those with differing disabilities. For example, under the legislation WATs are required to have a ramp access. However, there are a significant number of both users and operators who would prefer to use a lift or hoist.

It has also been suggested by advocacy groups that the WAT driver training, which is currently under review, be changed so as to provide drivers with a broader knowledge of different disabilities and enable them to better understand their customers.

From an operator's perspective, the viability of WATs is linked to their ability to secure a sufficient number of wheelchair trips or tariff 4 (maxi-taxi) jobs. Given the higher running costs of most WATs, as compared to standard cabs, receiving standard tariff 1 and 2 trips do not provide adequate returns. Different WAT operators use different strategies to cope with this.

The report has found that the current level of service provided by WATs to the wheelchair-dependent public is not equivalent to that provided to the remainder of the community through the standard taxi industry. While making more WAT licences available is likely to be the best way to reduce the differences between the two, it is possible that not all licences will be taken up. However, it is likely that if additional standard licences are released, there is a significant risk that the difference between response times for standard taxis and WATs will once again increase.

1 Introduction

This report was commissioned by the Passenger Transport Policy Branch of the Department of Infrastructure, Energy and Resources to assess the adequacy of wheelchair accessible taxi (WAT) services to wheelchair-dependent taxi users in Tasmania compared to the services provided to users of standard taxis.

1.1 Project brief and background to the project

The terms of reference of the consultancy are as follows:

1. identify a representative group of wheelchair-dependent taxi users and other parties qualified to comment on services provided to WAT users;
2. consult with DIER to finalise the methodology for conducting the review of the adequacy of WAT services;
3. ascertain the demand for WAT services in the four metropolitan taxi areas and to assess the extent to which this demand is being met;
4. determine the extent to which the level of taxi services provided to wheelchair-dependent users has changed since the 2003 wheelchair taxi survey;
5. assess the taxi industry's compliance with the Disability Standards in terms of the response times for WAT services for wheelchair-dependent passengers compared to the response times for all taxis in relation to standard (that is, non-wheelchair) taxi trips;
6. analyse other indicators of the adequacy of WAT services to wheelchair-dependent users in the four metropolitan taxi areas including: suitability of vehicles, number of vehicles, availability of vehicles, driver training and awareness, and any other issues identified during the review, and to suggest ways in which their services to wheelchair-dependent passengers might be improved; and
7. produce a report to DIER about the adequacy of WAT services in the four metropolitan taxi areas.

1.1.1 Regulation of the Tasmanian taxi industry

The Tasmanian taxi industry is principally regulated through the *Taxi and Luxury Hire Car Industries Act 1995* (the Act) and the *Taxi Industry Regulations 1996*. Following a review of the legislation in 1999-2000, significant amendments were made to the Act in 2003. The purpose of the amendments was twofold: to facilitate the industry's compliance with the Commonwealth *Disability Discrimination Act 1992* (DDA); and to ensure that Tasmania's obligations under National Competition Policy were met.

The legislation divides Tasmania into 24 geographic taxi areas that define where a licensed taxi is able to operate. Taxis are restricted to operating to, from or within their nominated area. Of the 404 taxi licences on issue, 85 per cent operate in the four metropolitan taxi areas – Hobart (207), Launceston (91), Burnie (22) and Devonport (22). The remaining licences are in the regional areas.

As a result of the 2003 amendments, the Act requires the Transport Commission to make available a specified number of new perpetual taxi licences in all taxi areas each year. In each area the

number of new licences to be made available each year is equivalent to five per cent of the number of licences currently on issue in that area, or one licence, whichever is the greater.

The Valuer-General assesses licence values every three years. The assessed market value (AMV) is the minimum price at which the Government can make new licences available. The AMVs of taxi licences range from \$1 000 in some rural areas to over \$80 000 in Hobart. Additional licences must be made available in a taxi area if demand for licences in that area exceeds a specified threshold above the AMV.

The Act provides for a two year moratorium (in 2004 and 2005) on the issue of new perpetual taxi licences in the metropolitan taxi areas. The purpose of the moratorium is to facilitate the introduction of WATs into the taxi fleet.

1.1.2 Disability Discrimination Act obligations

The introduction of WAT licences is linked to the Disability Discrimination Act (DDA). The DDA aims to eliminate discrimination, as far as possible, against people with disabilities, in a range of areas including the provision of services. Public transport, which includes taxi services, is a service covered by the DDA.

The *Disability Standards for Accessible Public Transport 2002* (the Disability Standards) prescribe how public transport is to be made accessible for the purposes of the DDA. For instance, they prescribe minimum standards such as access to the vehicles and the size of vehicles. Of particular relevance to this review, the Disability Standards require that response times for WATs are the same as for other taxis by 1 December 2007.

The Act requires that vehicles registered as WATs comply with the Disability Standards, and sets out other requirements for WATs, including the age of the vehicle and the means by which wheelchairs enter the vehicle. In Tasmania wheelchair access to a WAT is by means of a ramp, pursuant to Schedule 6 of the Act.

1.1.3 Wheelchair accessible taxis

In 2004 and 2005 in accordance with the Act, 33 WAT licences have been made available in the metropolitan taxi areas as shown in Table 1. These are equivalent to the number of standard perpetual taxi licences that would otherwise have been made available in 2004 and 2005 in these areas but for the introduction of WATs.

All of the WAT licences released in 2004 were taken up, and all but one are now in service. Sixteen of the 17 WAT licences made available in 2005 have been allocated. These vehicles were rolled out from July 2005. There was no application for a WAT licence in Devonport in 2005 and this licence remains available to anyone who can submit a compliant application.

Table 1. Release of WAT licences by taxi area

Taxi Area	2004 WAT Licences	2005 WAT Licences	Total issued
Hobart	10	10	20
Launceston	4	5	9
Devonport	1	1	2
Burnie	1	1	2
Total	16	17	33

Under the Act, WAT licences are to be made available only in 2004 and 2005 in lieu of standard perpetual taxi licences. However, the *Taxi and Luxury Hire Car Industries Amendment Act 2003* provides the Minister with the discretion to extend the moratorium on perpetual taxi licences in the metropolitan areas for a further 12 months and make further WAT licences available. Further WAT licences can only be made available in 2006 if it is deemed that the response times for WATs are not at least equivalent to the response times for standard taxis in a particular taxi area, as required by the Disability Standards.

There are no WATs currently operating outside the metropolitan taxi areas, but licences are available, on application to the Transport Commission, to operators wishing to enter the WAT market. However, many of these areas have a low level of demand for taxi services, with only one or two taxis per area. It is unlikely that taxi operators see WATs as commercially viable operations in these areas.

Licensing arrangements for WATs differ from those for standard taxis. WAT licences are issued free of charge, but WATs are required to be new, vehicles which are modified in accordance with the Act. The cost of these vehicles is considerably greater than that of standard taxis. The maximum possible life of a WAT is ten years, which is the period for which licences are issued. Unlike perpetual licences WAT licences cannot be leased to third parties. While WAT licences are transferable, only those operators who have held their WAT licence for the whole ten year licence period are entitled to automatic reissue of their licence. These arrangements for licensing and vehicle standards are aimed at ensuring the provision of a high quality, stable WAT service, and preventing the accumulation of scarcity value in WAT licences as has occurred in the case of perpetual licences.

In addition to the metered fare, a trip fee (\$10 in Hobart, \$12 in Launceston and \$16 in Burnie and Devonport) is paid by the Government to WAT operators for each trip where at least one wheelchair passenger is carried.

Under the Act the Transport Commission is able to impose conditions on a WAT licence in respect of the minimum number of wheelchair-dependent passengers carried under that licence if this is deemed necessary to improve the response times of WATs. At this time no such conditions have been imposed on any WAT licences. This review has collected and reviewed data on response times to determine whether such conditions should be imposed.

1.2 Project approach and methodology

The project approach combined statistical information with survey and interview data in order to obtain a comprehensive range of perspectives and to integrate 'objective' data with the experiences of the industry and users of WATs.

The steps undertaken were:

- Meetings with advocacy groups and their members to explore experiences, issues, areas of concern for consideration, including a mail out survey to member groups of ACROD.
- Review statistics available from DIER on Transport Access Scheme (TAS) vouchers² issued, vouchers redeemed, and number of members to determine trends in activity before and after the introduction of WATs. This was extended by sampling actual vouchers redeemed to determine the split in redemptions between wheelchair-reliant and other TAS vouchers by standard taxis and SPCs prior to and post the introduction of WATs. This is particularly important as the introduction of WATs is not yet complete so tracking these trends provides insight into the likely long term outcome as the remaining WATs become available.
- A survey of users to determine their experience with WATs and the level of service received. This was compared to the results of a survey conducted in 2003 covering a similar scope, with many of the same questions repeated for comparability.
- Interviews with standard cab operators, radio rooms, WAT operators, SPC operators and drivers.

Contact with the DIER steering group was maintained throughout the project at regular intervals. They provided significant guidance on contacts and Departmental experience with issues around the taxi industry and the introduction of WATS in Tasmania.

The results were analysed to relate the views collected with available statistical data and provide a meaningful insight into the level of service available in each of the four taxi areas where WATs are licensed to operate.

² Wheelchair reliant member of the TAS are the principal users of WATs so tracking changes in use by this group is a good indicator of WAT take-up. This program is described in detail in Section 2.1

2 Transport assistance for wheelchair-dependent persons

2.1 The Transport Access Scheme

Many wheelchair users are highly dependent on taxi services. These users rely on taxis for their everyday travel much more than general taxi users, and use taxis for a wider variety of reasons than do taxi users from the general population. However, it has historically been difficult for them to access taxi services in Tasmania.

In recognition of the difficulties associated with using other forms of public transport, wheelchair-dependent users with a permanent disability are eligible for membership of the Government's Transport Access Scheme (TAS) that provides taxi fare concessions when travelling in wheelchair accessible vehicles.

The Transport Access Scheme (TAS) provides for three levels of membership:

- General membership provides concessions on registration and MAIB costs, vehicle access to disabled parking spaces and extended times in other parking spaces.
- Taxi membership provides these benefits plus vouchers for use in taxis which provide a 50% reduction in taxi fares to a maximum benefit of \$25 per metered trip. Applicants must demonstrate financial need by submitting proof of receiving Commonwealth benefits.
- Taxi membership, "wheelchair reliant", provides vouchers for use in WATs, which provided a 60% reduction from the WAT tariffs to a maximum benefit of \$30 per metered trip. This membership is not means tested.

The wheelchair-endorsed vouchers may also be redeemed in standard cabs on the same terms as the standard taxi voucher.

To qualify for TAS taxi membership, applicants must submit an application form that has been completed by a doctor. The form has to specify the nature and severity of disability suffered and confirm that it is permanent. Under application forms in effect until November 2005, to receive a wheelchair-reliant TAS taxi membership did not require that the applicant was wheelchair dependent. The requirement was that the applicant was unable to walk unaided for more than 50 m. Assistance may be with a walking frame, rolling frame or by support from carer or other person.

Prior to the introduction of WATs, taxi services for wheelchair-dependent travellers that could not transfer to a standard taxi were provided by Special Purpose Cabs (SPCs). SPCs provide 'taxi style' services to wheelchair-dependent passengers, but are prohibited from providing taxi services to the general public and from standing on a rank or being hailed. As a result of these restrictions SPCs mostly operate in the larger centres. They tend not to operate at times of low demand and the majority of their work is contract work for schools and other institutions, rather than taxi style work.

SPCs are typically modified vans with hoists to lift wheelchair clients into the vehicle. They range

from smaller types of vans (Toyota Hiace, Tarago, etc.) up to small buses. A number have been fitted for carrying multiple wheelchair clients. They operate under accreditation for limited passenger services under Section 3 of the *Passenger Transport Act 1997*.

In contrast, WATs are able to provide general taxi services in addition to wheelchair work. This was intended to increase the commercial viability of these vehicles. In recognition of their existing specialist services to wheelchair clients, operators of SPCs were given the first option to be issued with a new WAT licence. With WATs now undertaking the majority of wheelchair work, SPCs will have their access to the TAS taxi scheme phased out by 30 June 2007.

2.1.1 Other transport assistance

The Transport Assistance Scheme (TAS) is only one of a number of assistance programs available to people who are wheelchair-dependent or who require assistance with mobility. Transport assistance is also available to these individuals from:

- Community Transport, largely funded by Home And Community Care (HACC)
- Transport provided by residential aged care or other specialist care facilities with their own vehicles.
- Department of Veterans Affairs (DVA) assistance for travel for medical needs, and
- Department of Education Inclusive Learning Support (ILS) assistance to disabled students to attend schools
- Motor Accident Insurance Board (MAIB)

The first two of these include providing some vehicles capable of taking wheelchair-dependent persons. The DVA, ILS and MAIB provide financial assistance to access available transport (like the TAS) but also undertake some of the booking arrangements. They rely on others to supply and operate the vehicles. Where given a choice, these alternatives may be preferred to the TAS taxi scheme assistance by a wheelchair-dependent person as the support provided covers a much larger percentage of the fare. In some cases these other agencies have taken the approach of supplementing the TAS taxi scheme to assist their clients, an approach formally discouraged by DIER.

2.1.2 Number of TAS taxi members

The number of TAS taxi members as of 30 September 2005 was 12 694, of which 2 772 were wheelchair-reliant members. The scheme currently gains about 20-25 wheelchair-reliant members and 125-145 non wheelchair-reliant members each month, and loses about 60 members a month due to deaths or other terminations (eg transfers interstate) for an average net gain of about 100 members per month. In the last year, the rate of net gain (% per year) was greater for non wheelchair-reliant members than for wheelchair-reliant members as shown by the comparison of numbers by membership type in Table 2 below.

Table 2. TAS Membership as of 30 June, 2004, 2005

	2004	2005	Change
All TAS members	18 603	20 299	9.1%
TAS Taxi members	11 096	12 469	12.4%
Non-wheelchair	8 415	9 726	15.6%
Wheelchair	2 681	2 743	2.3%

Source: DIER, TAS membership summary

To put this membership in perspective, it is useful to look at estimates of the total number of wheelchair dependent people in the community.

2.1.3 Wheelchair reliance in the community

The Australian Bureau of Statistics (ABS) conducted a *Survey of Disability, Ageing and Carers*, in 1998 and 2003. These surveys included an enumeration of the numbers of persons using various sorts of mobility aids including walking sticks, crutches, walking frames, wheelchairs, and scooters. The use of mobility aids for those requiring relatively greater assistance are summarised in Table 3.

Table 3. Numbers of persons using mobility aids, 1998, 2003

Type of aid	1998	2003	Change (%)
Crutches	21 400	25 100	17
Walking frame	103 200	179 300	74
Manual wheelchair	123 500	115 300	-7
Electric wheelchair	19 100	14 700	-23
Scooter	13 500	24 000	78
Total of aids listed	280 700	358 400	28

Source: ABS Cat No 4430.0 Survey of Disability, Ageing and Carers, Summary of Findings, 1998, 2003

Some notable trends in the data include:

- Overall dependence on mobility assistance has increased sharply, by 28%
- Dependence has increased particularly strongly on walking frames (74%) and scooters (78%)
- Dependence on wheelchairs has declined for both manual and electric wheelchairs.
- Wheelchairs and scooters accounted less than half (43%) of all persons requiring assistance with mobility in 2003, down from 56% in 1998.

Apparently recent health care trends have supported the greater use of walking frames for additional cardiac benefits to patients, and deferred use of wheelchairs until absolutely essential³.

All categories of mobility aids in Table 3 above would be likely to qualify an applicant for

³ Personal communication, Ken Black, ABS Manager for Disability Ageing and Carers statistical program.

membership in the TAS taxi wheelchair-reliant category – if required permanently – according to the application procedure in force up to the date of this consultancy. Clearly as many as half of these do not necessarily need a wheelchair – and therefore a WAT – in order to use a taxi service.

The *Survey of Disability, Ageing and Carers* did not require persons listing mobility aids needed to use them permanently or all the time in order for them to be included in the tabulation. However, based on the population of Australia of approximately 20 million in 2003, about 0.77% of the population at that time (154 000 persons) required the use of wheelchairs and scooters to some extent. Applied to Tasmania's population at the same rate, provides an estimate of 3 700 persons. The actual proportion Tasmania will be slightly higher due to higher levels of disability and an older age profile. Using a 15% increase compared to the national rate would estimate a total of 0.89% or 4 200 persons using wheelchairs and scooters in the state.

2.1.4 Reconciling TAS taxi membership numbers with community wheelchair use

While TAS taxi wheelchair-reliant membership was 2 772 on 30 September 2005 and an estimated 3 700 to 4 200 persons in the state may use a wheelchair, it is not therefore simply the case that about 70% of potential wheelchair-reliant members have joined the TAS taxi scheme, and that membership may grow accordingly if the scheme was more widely known.

1. As shown later in Section 3.1.3, as many as half of the members may qualify for this endorsement on their TAS taxi membership but not be wheelchair dependent. The market survey work undertaken for this project revealed that about half of those contacted did not currently rely on a wheelchair.
2. Not all persons using a wheelchair use it all the time or require it permanently. The proportion in this category is unknown from available sources.
3. Not all persons who are wheelchair dependent are so categorised in the TAS taxi scheme. Based on comments from taxi operators, a significant number of persons that have TAS taxi vouchers that are not endorsed as wheelchair-reliant use wheelchairs. According to them, some apparently entered the TAS taxi scheme when they did not need a wheelchair but have not 'updated' their membership when their needs changed.
4. According to the *Survey of Disability, Ageing and Carers*, over half (53%) of wheelchair-dependent persons are living in non-private residences. These include aged care/nursing homes, disability support homes and other forms of group accommodation. A few retirement villages are also classified as non-private residences. A large proportion of these will have little propensity to travel or will have their transport needs met by their accommodation provider.
5. Not all areas of the State have taxis, let alone wheelchair accessible vehicles. Wheelchair dependent people who live in these areas may not be joining the scheme as there is not an adequate service provided in their area.

The following section profiles TAS taxi membership and other evidence to provide estimates of the numbers of persons in different categories of need, and attempt to reconcile these estimates with the global estimate of persons requiring mobility aids, specifically wheelchairs.

3 Demonstrated demand for WATs

3.1 Profile of TAS taxi wheelchair-reliant members

The following section presents an analysis of wheelchair-reliant TAS taxi members which are used to reconcile existing membership numbers with those of estimated wheelchair use in the community as a whole.

3.1.1 Age of members

The ABS national *Survey of Disability, Ageing and Carers* showed the number of people using most types of mobility aids increases strongly with age. An analysis of TAS taxi wheelchair-reliant memberships shows the membership profile is consistent with this.

Age now

Table 4 shows the proportion of listed wheelchair-reliant members by age as of 30 September 2005. The table shows more than 60% of members are aged 70+ and just under one third are over 85. The proportion in the northwest and west is slightly lower, particularly for those aged over 85, but those over 70 are still more than half of all members. Less than one quarter of members are under 55, but with a higher proportion (31%) in the northwest and west.

Table 4. Share of TAS taxi wheelchair-reliant membership by age, region

	Child	18-24	25-39	40-54	55-69	70-85	85+	All
South	3.6%	2.6%	7.1%	9.5%	13.5%	29.9%	33.1	100%
North	4.5%	2.2%	7.0%	8.9%	15.2%	27.9%	34.2%	100%
Northwest/west	3.7%	2.9%	10.5%	14.4%	17.8%	28.3%	22.3%	100%
Tasmania	4.5%	2.2%	7.0%	8.9%	15.2%	29.0%	31.9%	100%

Source: TAS membership data set

The average age of current members may be slightly overstated as there may be members who have left the state or who are now deceased but who are still on the registry. A recent mailout to wheelchair-reliant members showed a non-deliverable rate returned by Australia Post of 4%. Some of these may have moved and remain within Tasmania but have not updated their address.

Age when joined

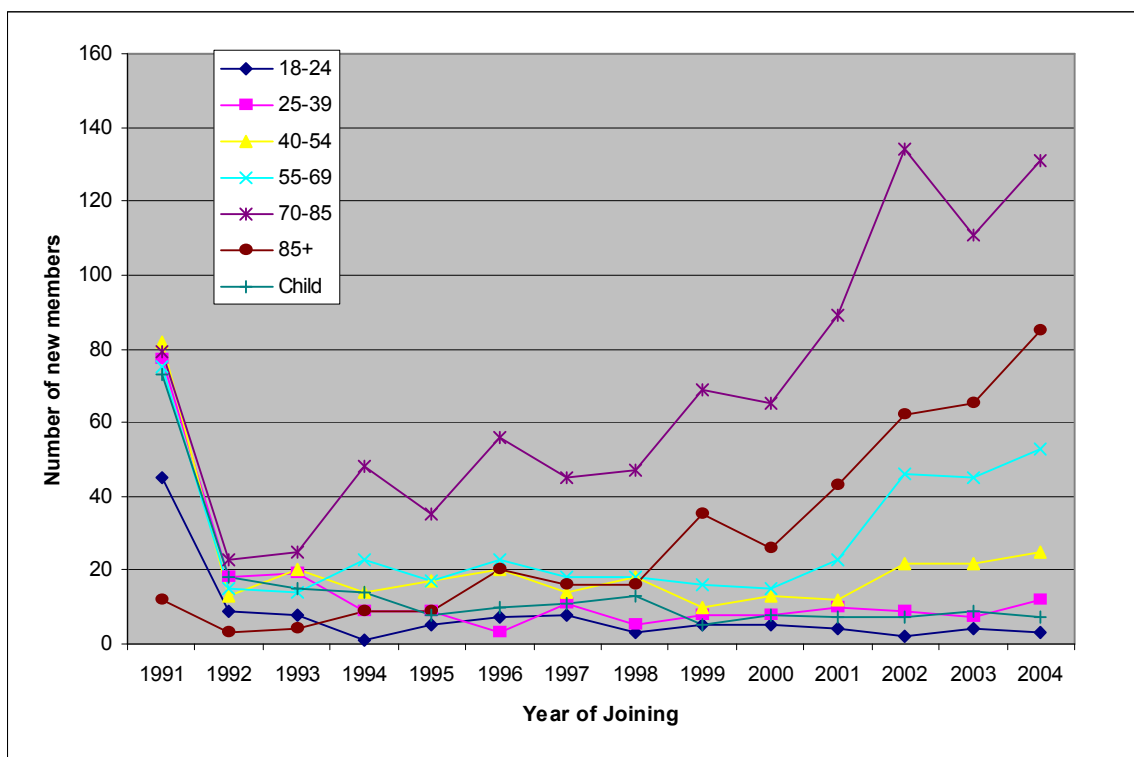
An analysis of the age of current members when they joined shows a different perspective. The chart in Figure 1 suggests that the average age of members when they joined in the early years was lower than more recently. However, as this is the **age when joined** of current members. Older-aged members are more likely to have left the scheme and there will be a greater relative

loss of these members from the early years. Nonetheless, the trend is strong enough to be able to say that:

- in the early years of the scheme, young members were a higher proportion of new members than today
- while the number of new members per year in the under age 55 groups has remained relatively constant, even declining slightly for under 25s, the numbers of older members joining has increasing sharply, particularly since 2000.

The average age at joining for those joining in 2004 was 72.9 years, which is 3.2 years older than the average age of current members at 69.7 years. Over 70% of new members joining in 2004 in the north and south regions and 68% state-wide were over 70 years old when they joined.

Figure 1. Age at joining by year or joining, current TAS taxi members



Source: TAS membership data set

3.1.2 Membership by region

TAS taxi wheelchair-reliant membership is not evenly distributed around the state as a proportion of population as shown in Table 5. Some notable features include:

- There is a large variation in the proportion of the population that are TAS taxi members from area to area, but a much smaller variation from region to region.
- Urban areas have a higher proportion as members than rural areas in all regions.
- Launceston has a particularly high proportion of TAS taxi wheelchair-reliant members
- There is a significantly smaller proportion of TAS taxi members per capita in the northwest than in the rest of the state. As noted earlier, the proportion that are in the older age

groups in the north west is lower than other regions, suggesting this group in particular is significantly under-represented.

It should be kept in mind that TAS taxi wheelchair-reliant membership may not be fully representative of the level of wheelchair dependence. Nonetheless, the pattern is consistent with expected tendencies for:

- persons with mobility difficulties to locate to urban areas.
- persons in rural areas less likely to seek membership due to lack of suitable taxi services.
- lower membership numbers in areas well-served by community transport offering an alternative service, e.g. Devonport and Burnie.
- higher membership numbers in areas well-represented by advocacy groups and/or where the scheme is well-known amongst medical professionals e.g. Hobart and Launceston.

Table 5. Proportion of population as TAS taxi wheelchair-reliant members

Area/Region	TAS Taxi Wheelchair-reliant members	Population	Proportion
Launceston	773	63 339	1.22%
Rest of north region	151	70 853	0.21%
North region	924	134 192	0.69%
Devonport	133	24 567	0.54%
Burnie	118	19 029	0.62%
Rest of northwest & west	130	61 843	0.21%
Northwest & west region	381	105 450	0.36%
Hobart	1340	185 904	0.72%
Rest of south region	119	48 990	0.24%
South region	1459	235 000	0.62%
Tasmania	2772	477 100	0.58%

Note: the three regions exclude King and Finders Islands, some members with unclear addresses. These are included in the state total

Source: TAS membership data set, ABS Estimated Resident Population

3.1.3 Wheelchair-reliant TAS taxi members not needing wheelchairs

The market survey of TAS taxi wheelchair-reliant members asked a number of questions to 'qualify' respondents before proceeding. These were meant to eliminate:

- Persons under 18 years of age
- Persons with a connection with DIER and the taxi industry
- Persons who were not wheelchair-reliant members of the TAS taxi scheme

In addition, the survey excluded persons who were evidently residents of aged care facilities (based on the stated address) as it is common for staff to make transport arrangements and the respondent would be unable to answer key questions about response time, etc.

The screening questions eliminated a surprising 50% of TAS taxi wheelchair-reliant members, 34% of whom were eliminated because they stated they were not wheelchair dependent. That is, one in six wheelchair-reliant members of the TAS taxi scheme are not wheelchair dependent. The main reason the members do not need a wheelchair is simply that this is not a requirement for applicants. The online form, which has recently been updated, had stated:

If the applicant is totally dependent on others for mobility and/or is wheelchair reliant the applicant will be eligible for a 60% discount on taxi travel in wheelchair-accessible vehicles.

Source: DIER website, November 4 2005

Other possibilities include:

- Application was made by a person with a disability that qualified for TAS taxi membership but the form was unclear and not correctly filled out, or was incorrectly processed, and a wheelchair-reliant membership was granted in error.
- The applicant was temporarily in need of a wheelchair but the medical practitioner chose to confirm that the need was permanent in order to provide the applicant with transport assistance.

Our assessment is that this application form was indeed complex and subject to error by applicants and medical persons. Of the 59 replying they were not wheelchair dependent, 6 stated “not in a wheelchair anymore” or “hasn’t been in a wheelchair for so many months” indicating that they once had a need but it was not permanent. They may still have difficulty walking 50 metres, so they may still qualify as TAS taxi wheelchair-reliant members.

Table 6. Wheelchair-reliant members not responding to the survey

Reason	Count	Share
Not wheelchair dependent	59	34%
Do not use wheelchair accessible vehicles	53	30%
Nursing home resident	24	14%
Deceased	11	6%
Other (doesn’t speak English, under 18, etc.), not stated	28	16%
Total	175	100%

Source: Myriad Research telephone survey interview log

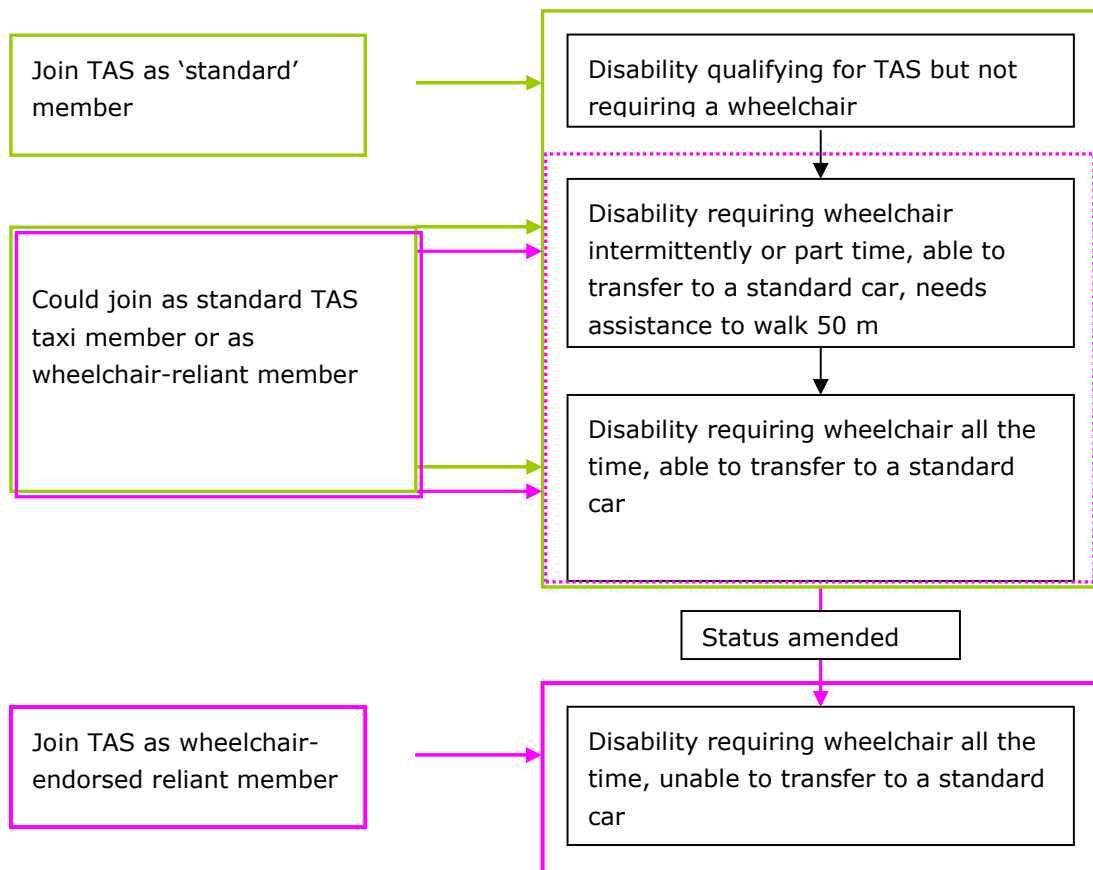
Of those that do not use wheelchair accessible vehicles, a significant proportion are also likely to not use wheelchairs, making the estimate of 35% of non-respondents not wheelchair dependent a conservative estimate. Translated to the total membership, this suggests at least 18% of TAS taxi wheelchair-reliant members and possible as many as 25% are not (currently) wheelchair dependent.

3.1.4 Transitions in TAS taxi status

An individual may join the TAS taxi scheme as a result of some impairment that reduces mobility but does not at first require a wheelchair and thus wheelchair-reliant membership. However, over time, their condition may change leading to need for assistance with walking or a wheelchair, perhaps at first intermittently and then later permanently. Their initial use of a wheelchair may still permit them to transfer to a standard car or taxi, so converting their membership to a wheelchair-reliant membership may not be of consequence.

Later, when they cannot transfer, they may present to a WAT in a wheelchair and the WAT operator can stamp their voucher as being from a person in a wheelchair. DIER has recently introduced a program of checking such stamped vouchers and mailing out a confirmation form to the member to enable their status to be amended to wheelchair-reliant. Figure 2 shows the series of transitions that an individual may go through that affects their status as a TAS taxi member.

Figure 2. TAS taxi status as health status changes



3.1.5 Lapsed Members, Inactive members

The telephone survey revealed 6% of 'non-qualified respondents' were deceased. Non-qualified respondents were 50% of those telephoned. This suggests at least 3% of all TAS taxi members are

deceased but not yet recorded as such. This may be an underestimate as there were also a large number of persons that could not be contacted because they did not have a telephone listing at the address given. A proportion of those may have moved, and others may be deceased.

As noted earlier, a recent mail out to TAS taxi wheelchair-reliant members found 4% of mail undeliverable. This is likely to include those that are deceased, those that have moved interstate, and those that have merely relocated within the state but not notified the registry and not yet reordered vouchers. Another 2% were returned marked deceased or no replied that they were no longer eligible for the scheme. There was no obligation or incentive to reply to this mailout. The proportions from the survey finding a high level of non-respondents suggest there are many more who may not qualify for the scheme. Overall this suggests that at least 10% of TAS taxi wheelchair-reliant members are no longer 'in' the scheme and potentially far more.

3.2 Vouchers Issued

All new taxi voucher members are issued vouchers upon entry to the scheme. When required, a member can reorder another booklet.

The vouchers issued in the 27 months from July 2003 to September 2005 were used to examine the rate of re-ordering vouchers. For those that were members before the period and therefore only received vouchers if specifically requested, 41% of wheelchair-reliant members and 47% of non-wheelchair members ordered vouchers during the period.

For those that joined in the last 27 months, the number that **reordered** books goes down the more recently they joined, as may be expected given that they would not have used their initial issue. Reorder rates for wheelchair-reliant members are shown in Table 7.

Table 7. Rate of vouchers reordered by date of joining

Date Joined	Number reordering vouchers, July 2003 – Sep 2005
Pre July 2003	41%
July – Dec 2003	29%
Jan – Dec 2004	24%
Jan – Sep 2005	16%

Source: TAS vouchers issued data set

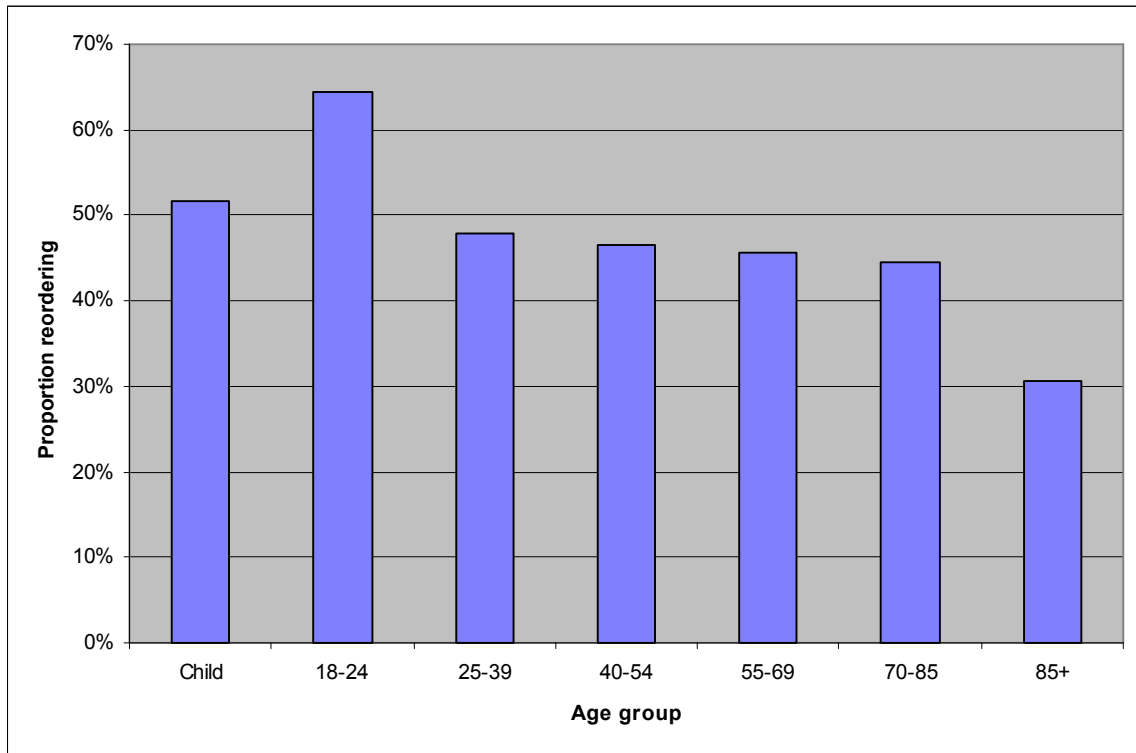
Analysis of the survey results found that those whose did not qualify were ordering at a similar rate to the average for wheelchair-reliant members of the scheme. From the small number of non-qualified (NQs), it was found that 43% of those members who joined pre-July 2003 had reordered vouchers, compared to 41% of the total number. Furthermore, those who explicitly stated they did not use WATs or SPCs were re-ordering at similar rates than other NQs.

The average age of members also affects the tendency to reorder. The proportion of members of each age group that re-ordered books of vouchers in the 27 month period is shown in Figure 3.

This provides an indication of the proportion of members who are active in the TAS taxi scheme by age. While 41% of all members reordered voucher books in the period, the proportion reordering

was higher than this for all age groups under 85. While those aged 18-24 had a significantly higher rate of reorder (64%), the differences between other age groups up to age 85 are relatively small, with a small decline in activity with age. However, the proportion of active members declines to 31% for those over 85 years of age. Some members may still be active and reorder, just not within the 27 month window. However, at 40 vouchers per book, this would imply about one round trip every six weeks, a fairly low level of activity.

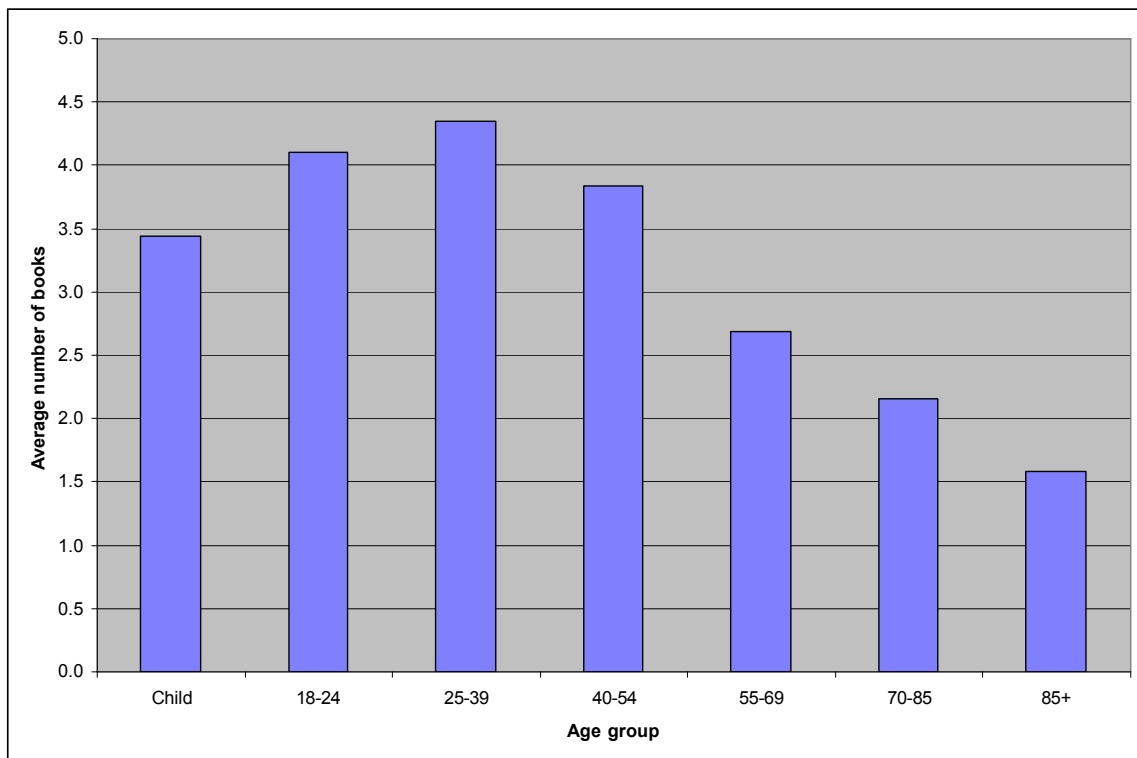
Figure 3. Proportion of members reordering by age group, July 2003 – Sep 2005



Note: Based on members joining prior to July 2003
 Source: TAS taxi vouchers issued data set

For those that did reorder, the number of books ordered per member declines much more strongly by age (Figure 4). The 25-39 year age group uses more vouchers per active member than the 18-24 year age group or children. Beyond that, use drops steadily with age with active members in the 70-85 year age group using less than half as many vouchers as active members in the 25-39 year group, and those 85+ using about one third.

Figure 4. Average number of voucher books issued by age group, Jul '03-Sep '05,



Note: Based on members joining prior to July 2003
 Source: TAS taxi vouchers issued data set

Table 8 expresses this as implied single trips per active member per month. This shows an average of 5.0 trips per month or a little more than one per week. If most outings are round trips, this corresponds to about one 'outing' per fortnight.

Table 8. Average trips per month by age group per active member

Age Group	Trips per month (avg)
Child	5.6
18-24	6.9
25-39	7.3
40-54	7.3
55-69	5.2
70-85	3.9
85+	2.6
All groups	5.0

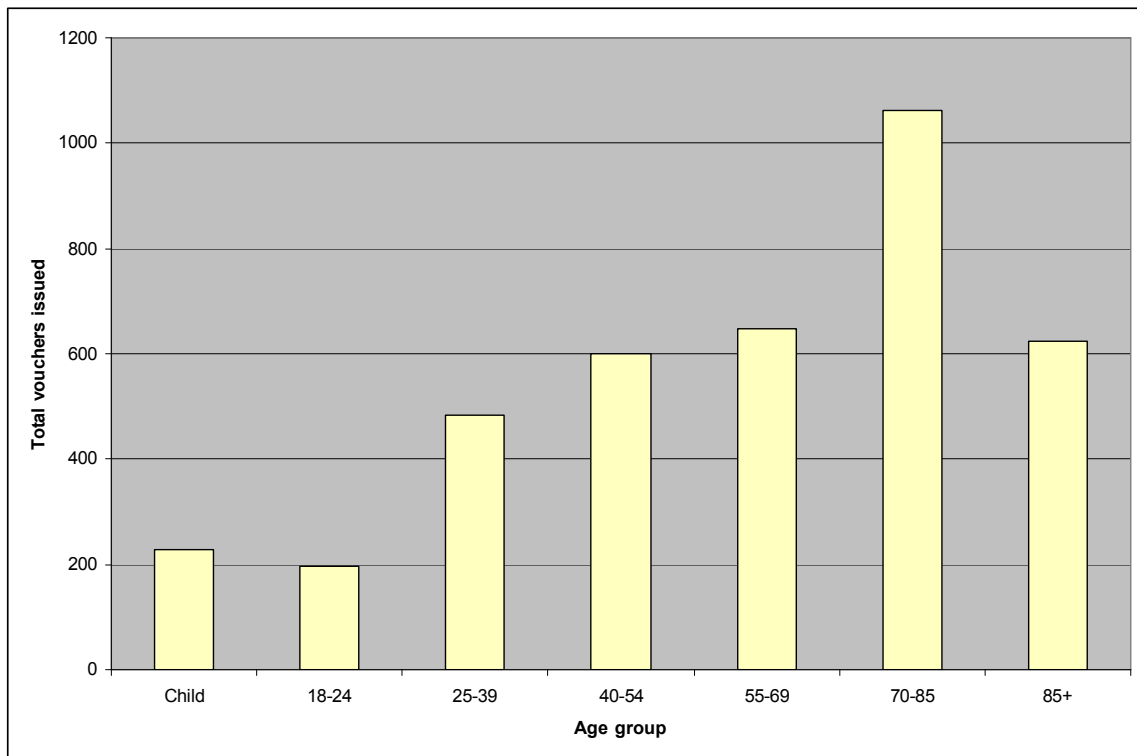
Note: Based on members joining prior to July 2003
 Source: TAS taxi vouchers issued data set

The calculation in Table 8 assumes that all vouchers issued are used. The overall ratio of vouchers

issued to those redeemed is about 87%.⁴ The majority of unused vouchers are expected to be associated with members who are not active and never completely used their first-issued voucher book, so the assumption should not be too misleading.

While a higher proportion of younger members are using vouchers, and younger members use more vouchers than older members, there are very many more, older members in the TAS taxi scheme. Thus the total number of vouchers issued to older members is substantially greater than the number issued to younger members (Figure 5). About 42% of all vouchers were issued to persons over age 70.

Figure 5. Total number of voucher books issued by age group, Jul '03-Sep '05



Note: Based on members joining prior to July 2003
 Source: TAS taxi vouchers issued data set

Table 9 shows the number of trips per month does not vary greatly by region, with a slightly lower frequency in north and northwest rural areas than in most urban areas. The most exceptional urban area is Devonport with a significantly lower rate of trips per month than for other areas.

⁴ Based vouchers issued and redeemed from October 2004 to September 2005.

Table 9. Average trips per month by region per active member

Region	Trips per month (avg)
Burnie	5.1
Devonport	3.5
Hobart*	4.8
Launceston	5.1
Rest of north	4.0
Rest of northwest, west	4.2
Rest of south	5.3
All Tasmania	5.0

Note: Based on members joining prior to July 2003

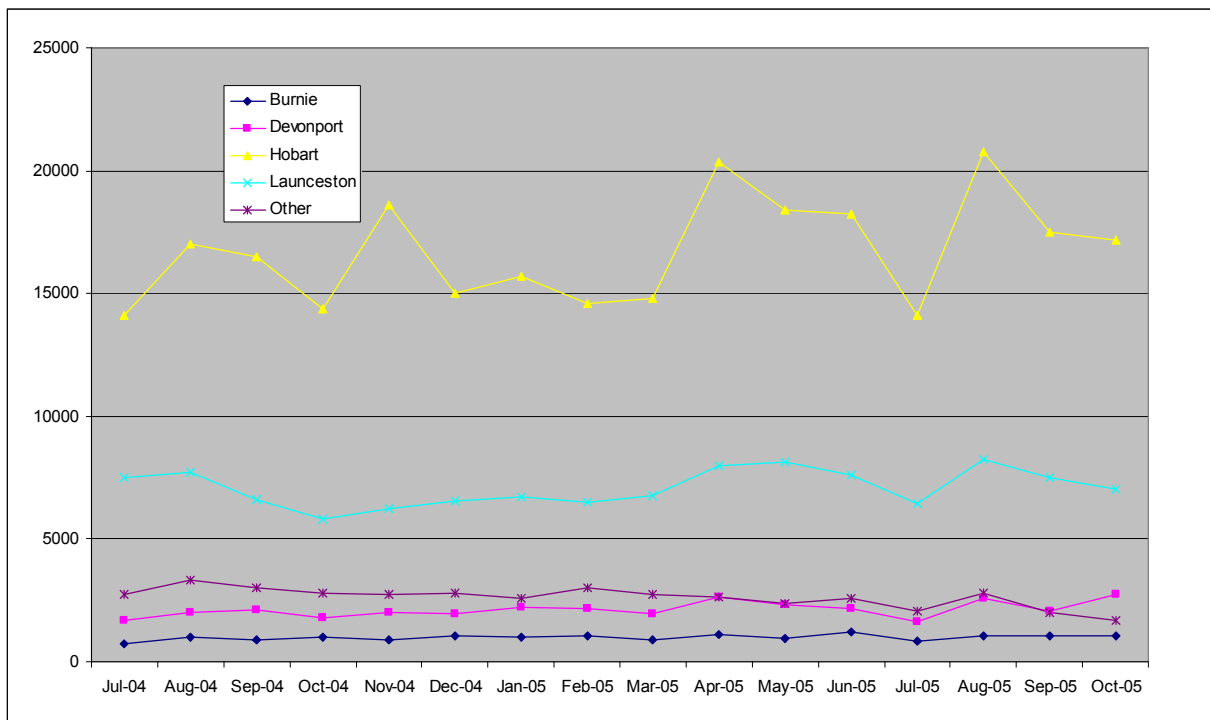
* Excludes large numbers of books ordered by Cosmos for use by its clients

Source: TAS taxi vouchers issued data set

3.3 TAS Taxi Voucher Claims

Figure 6 shows the trend in **total** TAS taxi vouchers claimed by month from Jul 2004 to September 2005, the period covering the introduction of the WATs. The graph does not show actual usage by month as some companies may be slow in claiming voucher redemptions. The graph shows a significant degree of volatility, particularly in Hobart, some of which is probably attributable to delays in redeeming vouchers and others to seasonal variations.

Figure 6. TAS Taxi Voucher Claims by Region, July 2004 – October 2005



Source: DIER voucher redemption data base

A comparison of the four month period from July to October each year avoids the worst of the seasonal variation. This shows a generally increasing trend in use, with a 9% increase across the state over the 12 month interval. This is summarised in Table 10. The table shows strong increases in all urban area but decreases in outside of the urban areas.

Table 10. TAS taxi voucher redemptions, year to year change

	Burnie	Devonport	Hobart	Launceston	Other*	Tasmania
July to October 2004	3 656	7 588	61 969	27 620	11 903	112 736
July to October 2005	4 024	9 039	69 557	29 217	10 583	122 420
	10%	19%	12%	6%	-11%	9%

* includes vouchers where the taxi areas were not specified

Source: DIER TAS taxi voucher redemption data base

The increase in voucher redemptions statewide is actually smaller than the increase in members of the TAS taxi scheme. TAS taxi scheme members grew by an estimated 100 members per month or an increase of 12.4% for the year from June 30 2004 to June 30 2005.

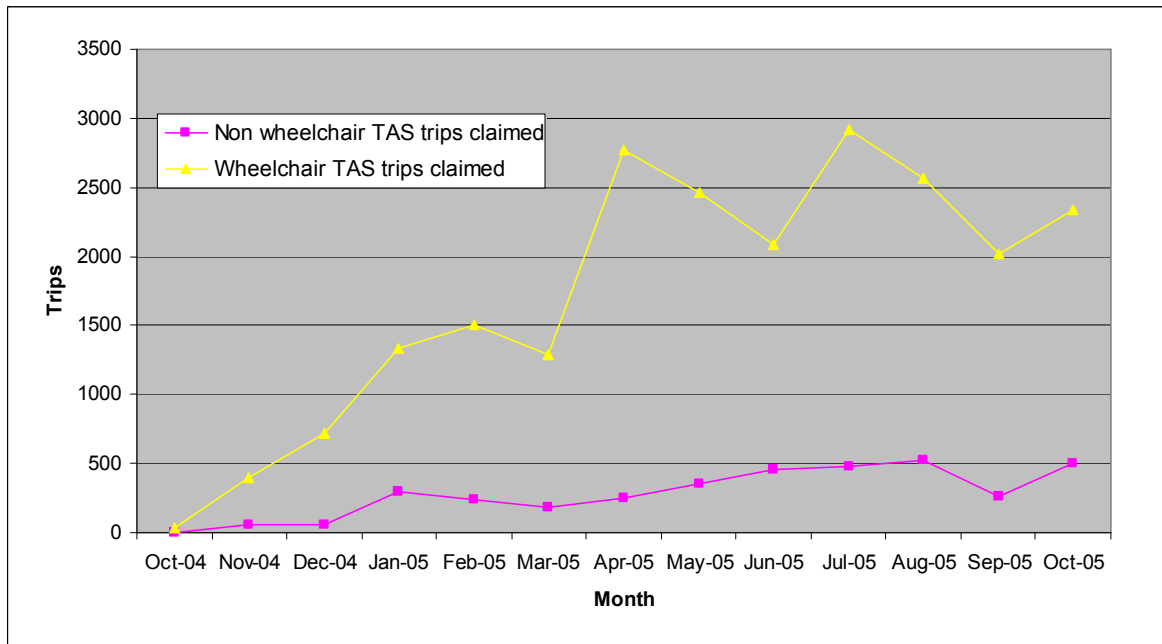
3.3.1 Take up of WATS based on voucher redemptions

Redemption of wheelchair-endorsed vouchers by WAT operators provides an indication of the rate of take-up of these vehicles by users over time. As discussed below, the roll out of the fleet that has already been accredited is incomplete. Additional capacity is still to be added in all taxi areas. As additional WATs become available, it is reasonable to expect some further transfer of riders from standard cabs and SPCs to WATs. Also, to the extent that WATs are a preferred form of transport and enable some to travel that otherwise would not be able, there is likely to be growth in total numbers of riders.

However, as more and more WATs are added, it is also reasonable to expect this process to approach a maximum where adding more WATs does not increase wheelchair rider numbers.

Figure 7 shows the trend in vouchers redeemed since the introduction of WATs. This has relatively quickly reached an apparent plateau. However, it should be acknowledged that the data is of vouchers redeemed, not journeys taken in the month, and that some operators are erratic in the timing of redemptions.

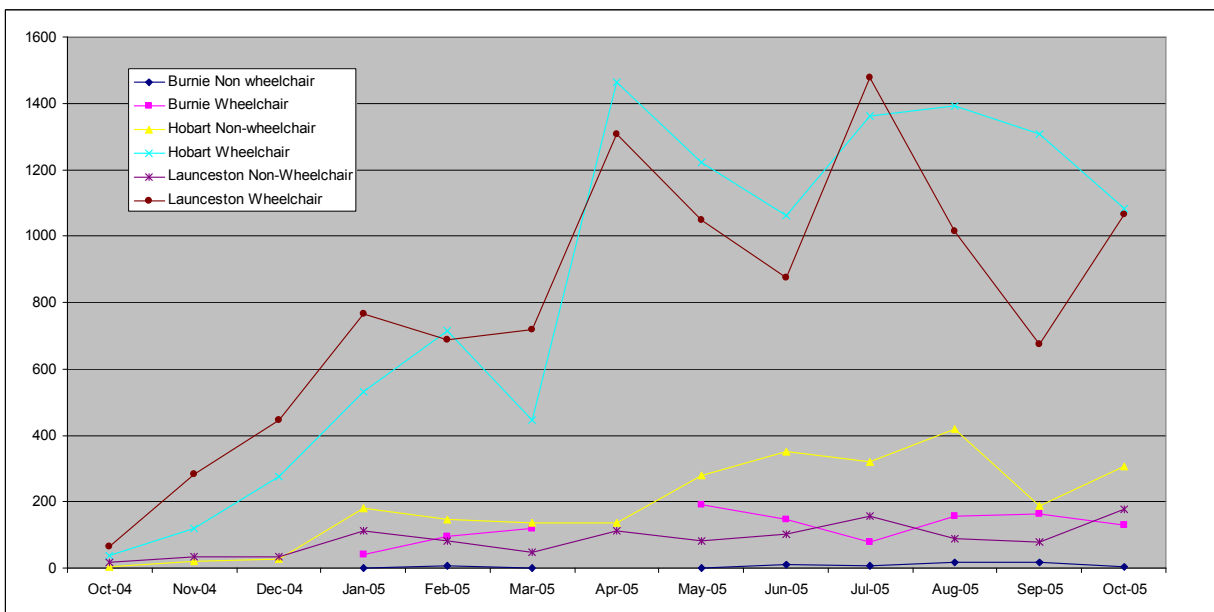
Figure 7. WAT TAS taxi voucher redemptions, wheelchair and non-wheelchair



Source: DIER WAT voucher redemption data base

Figure 8 shows the same data by region, with a roughly similar pattern revealed for each region. Both Devonport and Hobart had additional WATs introduced in the last four months so the levelling off does not reflect a limit set by available capacity. Devonport is not shown as there was no WAT operating there at the time of the consultancy.

Figure 8. TAS taxi voucher redemptions by region from WATs



Source: DIER WAT voucher redemption data base

For WATS, the proportion of wheelchair-endorsed TAS taxi vouchers out of total TAS taxi vouchers submitted in claims averages over 85%. This varies somewhat by region with Hobart at 82%, Launceston 90% and Burnie 95%. This is very high compared to the proportion of wheelchair-endorsed vouchers redeemed by standard cabs, which is generally less than 10%. However, in spite of this, **standard cabs still redeem more wheelchair-endorsed vouchers than one year ago and nearly as many as WAT operators**. This reflects a combination of:

- Wheelchair-endorsed vouchers issued to members who are not wheelchair-dependent
- Wheelchair-reliant members who are able to transfer to standard cabs and prefer to do so.

The breakdown of different groups is presented in detail in Table 11 below.

3.4 Survey findings revealing demand

The respondents in the survey of users were screened to include only those who are wheelchair-dependent. The survey revealed that over one quarter of those interviewed had used a standard cab and just over half had used a friend and/or relatives car in the past 6 months in addition to WATs and other forms of transport.

Furthermore, the survey reveals that for this group, WATs represent the preferred form of transport for only about half of respondents. Other forms of transport which were most highly preferred included: a standard taxi (14%), family car (25%), friend's car (12%) or driving themselves (12%). While a proportion of these vehicles have aids to permit entry or transfer (e.g. hoist), relatively few would be fully accessible for passengers remaining in their wheelchair.

Even more significantly, for just over one third of respondents, WATs were seen as a last resort, used only when nothing else is available. This proportion was notably higher in the northwest (58%) compared to the state average of 35%.

3.5 Summary of user groups and characteristics

The evidence presented above has been used to prepare the indicative estimates for the numbers in different sub-groups as shown in Table 11. Numbers in bold have a relatively high reliability. Numbers in italics are particularly uncertain.

The estimates account for the fact that:

- Survey findings showing about 18-25% of wheelchair-reliant members of the TAS taxi scheme contacted are not wheelchair dependent
- About half of wheelchair-endorsed TAS taxi vouchers are redeemed by standard cabs
- About 5% - 10% of members are likely to not be there
- Standard taxi operators report a small proportion of TAS taxi voucher holders (~6-8%) present in wheelchairs

Table 11. Indicative estimates, wheelchair users

	TAS taxi member, wheelchair reliant+	TAS taxi member, not wheelchair reliant+	Not a TAS taxi member	All
Permanently wheelchair dependent				
Requires a WAT	1100-1500	100-150 [^]		
Able to transfer to a standard cab*	400-800	50-100	1600-2000	3700-4200
Requires wheelchair, pt/temp	50-100			
Not wheelchair dependent	500-700	8400-8800		
Moved, deceased, untraced	150-250	800-1000		
Total	2773	9726		

Colour border indicates core group

+ refers to membership status, not physical condition

* but may prefer a WAT. Also, degrees of difficulty in transfer: some can transfer alone, some need assistance

[^] based on a recent mailout to members, where taxi vouchers in their name had been submitted by WAT operators over a three week period claiming that the TAS taxi member presented in a wheelchair but their taxi voucher did not identify them as wheelchair-reliant: 33 confirmed they were wheelchair reliant, 6 were not, 12 remain outstanding. The estimate in the table allows for a significant share of members that travel infrequently to be revealed over time.

Source: SGS Economics & Planning

Of the nearly half of those that have some wheelchair dependency that are not TAS taxi members, it is expected that:

- Many have only a partial dependency on wheelchairs
- Many are in nursing homes or other institutional care and have transport needs met or do not travel outside the institution
- Some live in rural areas where the vouchers provide little opportunity for transport and so use other alternatives (eg own car or community transport)

Nonetheless, this group still represents a potential source of additional demand.

New members are dominated by the frail aged. On average, frail aged are less likely to travel than younger age groups, so usage rates may not increase as fast as membership numbers.

4 The supply of WATs

4.1.1 Types of WATs

There are two types of WATs, people movers and vans. By the time the vehicles allocated in the 2005 ballot are on the road there will be eight people movers and 23 vans. The people mover type vehicles are the Kia Carnival, Toyota Tarago and the Chrysler Voyager. Seven of the eight people movers are in use in Hobart. Vans include the Renault Trafic, FIAT Ducato and Mercedes Benz Sprinter. The majority of vehicles are rear loading, with only four being side loading, all in Hobart.

Vehicles were introduced gradually from late 2004 in Hobart, Launceston and Burnie, but Devonport did not have any operating WATs before this evaluation began. The roll out of WATS is summarised in Table 12. In Burnie, the only WAT has been in operation since December 2004, so any change since then has not been affected by changes in capacity. Both Launceston and Hobart have seen a gradual increase in capacity since late 2004, right up to the time of the evaluation. In both cases additional WATs remain to be put into service. The pattern of transfer from SPCs to WATs is reviewed in detail by region in Section 4.3, Transition to WATs by Region.

Table 12. Number of WATs by region

Commencement	Number/Type	Operator/Radio Room	Loading	Count
Hobart				
October 2004	1 Chrysler Voyager	J. Riske (Associated – independent from Jul 05)	Rear	1
November 2004	1 Fiat Ducato	J. O'Rourke (Associated)	Rear	2
November 2004	1 Chrysler Voyager	J. O'Rourke (Associated)	Rear	3
December 2004	1 Chrysler Voyager	R. Postma (City Cabs)	Side	4
December 2004	1 Renault Trafic	R. Postma (City Cabs)	Side	5
December 2004	1 Chrysler Voyager	T. Glover (Associated)	Rear	6
April 2005	2 Chrysler Voyager	D. Wylie (Taxi Combined)	Rear	8
May 2005	1 Toyota Tarago	M. Bartusiak (Associated)	Rear	9
June 2005	1 Renault Trafic	R. Postma (City Cabs)	Side	10
October 2005	1 Fiat Ducato	L. Clark (Associated)	Rear	11
November 2005	1 Renault Trafic	R. Postma (City Cabs)	Side	12
December 2005 – March 2006	8 Fiat Ducatos	C. Bakker (City Cabs)	Rear	20
Launceston				
October 2004	2 Fiat Ducatos	C. Bakker (Central Cabs/Independent)	Rear	2
January 2005	2 Fiat Ducatos	C. Bakker (Central Cabs/Independent)	Rear	4
July 2005	1 Fiat Ducato	C. Bakker (Central Cabs/Independent)	Rear	5
August 2005	1 Fiat Ducato	C. Bakker (Central Cabs/Independent)	Rear	6
September 2005	1 Fiat Ducato	C. Bakker (Central Cabs/Independent)	Rear	7
October 2005	1 Fiat Ducato	C. Bakker (Central Cabs/Independent)	Rear	8
November 2005	1 Mercedes-Benz Sprinter	G. Roberts (Independent)	Rear	9
Devonport				
November 2005	1 Kia Carnival	Devonport Taxis	Rear	1
Burnie				
December 2004	1 Fiat Ducato	T. Brooks	Rear	1
2005*	1 Fiat Ducato	T. Brooks	Rear	2

Note: Dotted line indicates date of survey. Vehicles above the line were in service before the survey was conducted, albeit for some vehicles, only for a few weeks.

* Date yet to be determined

Source: DIER registry of WAT licences

4.2 Alternatives to WATS

4.2.1 Special Purpose Cabs

As described in Section 2.1, prior to the introduction of WATs, special purpose cabs (SPCs) were the principal form of commercial transport available to wheelchair-dependent people. The scope of SPCs in the state is not well defined. The Motor Registry has a record of some 180 vehicles under Limited Passenger Services accreditation but cannot differentiate between SPCs and vehicles that provide non-wheelchair transport or offer community transport. Furthermore, while SPCs provide wheelchair transport to a variety of clients, they are not permitted to operate a taxi service and some operate under exclusive contract arrangements to a limited number of clients (eg the Department of Education for school transport).

Prior to the rollout of WATs, 20 vehicles operating under Limited Passenger Services accreditation were recognised as SPCs providing wheelchair-accessible transport across the State. SPC accreditation is free and also once accredited an operator is able to run any number of vehicles provided their vehicles pass inspection and other permit requirements. Special purpose cabs (SPCs) are predominately Toyota Hiaces, Commuters, Taragos or small buses. Nearly all of these vehicles were fitted with a hoist or lift, as opposed to WATs, which are required to have a ramp.

The SPC tariff structure for wheelchair trips is the same as WATs, but they do not get the trip fee. However, SPCs are only obliged to charge these tariffs when carrying a TAS taxi member. At other times the fare structure is at the discretion of the operator.

WAT licences were available to anyone who wished to enter an open ballot for them. However, those who were operating SPCs were given preference ahead of others and could receive one WAT licence for every SPC that they had operating if they met the other qualifications. Some SPC operators who chose not to take up WAT licences commented that in their experience, operating a WAT would not be viable given the limited amount of wheelchair work, the high initial and ongoing costs of the vehicle, and the non-tradable, zero value nature of the licence.

Compared to the 20 SPCs previously in operation, there are now 11 operating in the four regions. Some of the others are now run by different operators and the nature of their work has shifted further towards contract work. Five of the WAT operators continue to operate one or two SPCs. Some standard cab operators have introduced SPC type vehicles as part of their fleet to provide a wheelchair accessible option without obtaining a WAT licence and the limitations that it imposes.

Other operators continue to run two SPCs to meet specialist client needs, eg: buses which can take up to 4 wheelchairs and 11 other passengers and receives almost all of their business from nursing homes and schools and other operators working under contract to the Department of Education. These operators are not generally targeting the same market as WATs and their viability would not be affected by the introduction of additional WATs.

The level of activity of some SPCs is changing. With many of the 2005 WAT vehicles only just coming into service, some operators are phasing out their SPCs as their WATs commence

operating. While the introduction of WATs was intended to replace these vehicles, some operators stated that they are bringing additional SPCs onto the road in the near future, despite the fact that SPCs are set to have their access to the TAS taxi scheme phased out by 30 June 2007. Table 13 shows the number of SPCs which will be operating in the four regions by the end of 2005 based on information from known operators.

Table 13. SPCs available for general work by region, end 2005

Location	Number of SPCs
Hobart	5
Launceston	4#
Devonport	1
Burnie	1
Total	11*

* Does not include community transport or SPCs operating outside the four cities, and excludes SPCs working entirely under contract to the Department of Education, nursing homes or tour operators with wheelchair accessible vehicles.

Includes one vehicle with wheelchair access operating under a standard taxi licence.

Reasons for continuing SPC operations include:

- To increase market share or capacity where WAT licences are unavailable
- To obtain a lower cost vehicle
- To serve niche markets with the capacity to carry groups of wheelchair dependent passengers
- The need for a vehicle with lift capacity for clients for whom ramps are unsuitable.

In particular, operators expected that vehicles would cater for a minority, but significant number, of passengers which due to their weight, the weight of their wheelchair or their individual preference choose to travel in a vehicle with a hoist/lift, not a ramp. Operators commented that it was easier and safer to operate a lift than push a wheelchair into their vehicle.

Another reason for using SPCs was to secure or build their market share. Standard taxi operators which had recently bought SPCs reported doing so to ensure that they could provide wheelchair-accessible transport if requested by a customer without the large investment required by a WAT. One operator reported that he intended to use his SPC under a standard taxi licence so that it was able to do standard taxi work as well as wheelchair work.

One of the main reasons that operators are opting for SPCs is the lower cost of purchase and repair. While a WAT typically costs \$70,000 - \$100,000, an SPC could be bought second hand or refitted for \$10,000 - \$18,000. With lower operating costs, some operators expect that even after paying the lease for a taxi licence, the total cost will be lower.

4.2.2 Community transport

The Community Transport sector provides transport assistance to those in need through a range of providers operating under different funding arrangements for different target groups. By far the

largest is the Home and Community Care sector targeting the disabled and frail elderly. They are specifically seeking to assist individuals to remain able to live independently in their own homes, avoiding institutional care. There is a large overlap between this target group and those eligible for TAS taxi membership and use of WATs.

Community transport in various formats provide over 100 vehicles across the state. Just under one quarter of these (mostly vans and buses) would have some form of aid for loading wheelchair passengers. Boundaries between classifications are at times ambiguous. Some SPCs could be classified as community transport vehicles.

According to a recent report, *Rural Community Transport Audit and Review*⁵, community transport made an estimated 150 000 one way client trips in 2004-05 in rural areas. About 5% of community transport passengers are wheelchair-dependent giving an estimated 7 500 trips in that period in **rural** areas.

The number of trips in urban areas was not established by the report. In urban area it would be less in proportion to the population as there are more transport alternatives available, but even so it is likely to be significant compared to the roughly 350 000 TAS taxi vouchers and 20 000 WAT wheelchair-endorsed vouchers redeemed in the same period.

The extent of wheelchair accessible community transport vehicles varies by region, as will be noted in the regional assessments given below.

4.2.3 Conventional cabs

As noted in Section 3.5, about half of wheelchair-dependent persons are able and even prefer to transfer to conventional cabs rather than travel in WATs. There are clearly far more conventional cabs than WATs, so there is more likely to be a conventional cab free and in your area when requesting a cab for ASAP arrival. Many users associate a conventional cab with greater independence or more normal form of transport than WATs. A number comment that sedans are more comfortable to ride in and they prefer to sit in a car seat than their chair.

One operator stated that many of their clients believed that it was cheaper to travel in standard taxis than WATs. Given the tariff structure currently in effect, standard cabs are cheaper if the comparison is on the basic tariff only. However, a wheelchair-dependent person submitting a TAS taxi wheelchair-endorsed voucher would get a 60% discount on the WAT but only 50% on the standard cab. The WAT becomes cheaper than the standard cab after about 2-3 kilometres, depending on the time of day, all else being equal.

⁵ *Rural Community Transport Audit and Review*, SGS Economics & Planning, 2005 for DIER

Table 14. Taxi fare tariffs, effective November 2, 2005

	Flagfall	Standard Cabs (Metro areas)	WATs	SPCs[^]
Tariff 1 (flagfall): 6am – 8pm weekdays	\$3.00	\$1.58	\$1.58	\$1.58
Tariff 2 (flagfall): other hours	\$3.00	\$1.89	\$1.89	\$1.89
Tariff 3 (flagfall): wheelchair-passenger, 6am – 8pm weekdays	\$4.50	N/A	\$1.75*	\$1.75
Tariff 4 (flagfall): wheelchair-passenger, other hours OR 5 or more passengers	\$4.50	N/A	\$2.09#	\$2.09

* Operator receives a trip fee paid for by DIER through the TAS taxi scheme upon redemption of voucher. Trip fee varies by region: \$10.00 Hobart, \$12.00 Launceston, \$16.00 Devonport & Burnie

#If carrying wheelchair passenger, operator receives trip fee as above.

[^] SPC operators are only obliged to charge these tariffs for TAS taxi members. Their fare structure is not otherwise regulated.

Some WAT operators run their meter while assisting the wheelchair passenger. A number of survey respondents noted that this was the case and can add to the total fare significantly. Standard cab operators normally engage the meter when they pull away from the curb. Thus the trip may have to be significantly longer than 2-3 kilometres to equalise the fares. Voucher redemption statistics show that average distances are quite short for TAS taxi fares, supporting the view that WATs may cost more than standard cabs for many users.

4.3 Transition to WATs by region

4.3.1 Burnie

Burnie has two existing taxi operators:

- a WAT operator with one WAT in service and another pending
- a cooperative which runs 20 standard cabs.

Both WAT licences have been taken up by the existing SPC operator while two standard taxi licences, though bought, remain unused in the Burnie market.

Burnie's first WAT, a Ducato, started mid December 2004 and the second Ducato is expected to commence next year, though the date is not yet set. The WAT has been used in a fashion similar to an SPC, in that it does not take regular taxi fares and all standard work is referred to the cooperative's radio room. This has meant that the vehicle has only done a relatively small number of kilometres. The SPC is still used on the occasion that it receives work where neither the origin nor the destination is inside Burnie. According to the operator it is used very infrequently.

The WAT is currently working for the equivalent of 25 hours a week. The majority of work currently is pre-booked with the operator requesting customers to try to book the day before.

Burnie is relatively well served by community transport vehicles with 5 buses having wheelchair hoists or other aids based in Burnie or Wynyard. It is understood that a significant part of these vehicles' activities are in the adjacent rural area as well as within Burnie taxi area. The vehicles tend to take clients to and from day centres and do not act as general 'taxi' services.

As noted in Section 3, Burnie has about the same number of TAS taxi wheelchair-reliant members per capita as the state as a whole. At present there are 118 wheelchair-reliant members for the one WAT. In principal this should be sufficient to keep it occupied exclusively with wheelchair work. However, to date, the first WAT is reported to be only working 25 hours per week redeeming an equivalent of 5 wheelchair and 0.3 non-wheelchair TAS taxi vouchers per day. Redemptions grew quickly for the first six months, but have remained essentially constant since.

With the introduction of a second WAT, there will be 59 members per WAT. The vehicles will have to seek additional fares to operate full time.

Table 15 summarises the apparent shifts in wheelchair-dependent passenger activity since the introduction of WATs using the three-month periods July-September 2004 to July-September 2005 based primarily on voucher use. It tracks the changes in voucher redemptions by source for each three-month period.

Table 15. Change in wheelchair-dependent activity based on voucher redemptions, Burnie

	Standard cab	SPC	WAT	Total
2004	240	120	0	360
2005	340	0	280	620
Change	+43%		+135%	+74%

Source: Estimate by SGS Economics & Planning based on DIER voucher redemption data, samples of standard and SPC voucher redemptions enumerated by SGS

The table shows a strong 74% growth in wheelchair-endorsed voucher redemptions. While most of the growth was in the SPC/WAT area, quite strong growth also occurred in redemptions from standard cabs. The SPC has shown no voucher redemptions since January 2005. The growth in redemptions clearly exceeds the growth in membership. The growth could be accounted for some transfer of activity from the community transport sector or a stimulation of greater travel activity as a result of greater transport accessibility due to the WAT being available. There may be a higher proportion of members becoming active or already active members travelling more. The available information cannot show which is true.

However, the level of activity remains below the state average so there may be some room for additional growth.

4.3.2 Devonport

One operator services the Devonport market with 19 standard taxis operating currently, with an additional one vehicle likely to be on the road by Christmas. Three of these vehicles are station wagons that are often used by customers that can or prefer to transfer from their wheelchairs. These vehicles can easily accommodate the folded wheelchair in the back whereas sedans with LPG tanks find this difficult.

The operator has been running an SPC for nearly ten years and has taken up the first WAT licence. Devonport's first WAT, a Kia Carnival, is soon to be operating, and at the time of this consultancy the operator was waiting for its WAT plate to be sent from DIER before commencing work. The SPC will continue to operate for clients preferring or requiring a lift entry to the vehicle, at least in the short term.

Like Burnie, two standard licences remain unused, as does one WAT licence. It is considered by the incumbent unlikely that any additional licenses will be taken up.

Community transport, particularly Mersey Community Care, is strong in Devonport and surrounding area. However, compared to Burnie, there are many fewer vehicles (only 2) specifically equipped to load wheelchair-dependent passengers. Nonetheless, the operator expressed the view that demand was limited in Devonport in part because it was well served by community transport.

Devonport has the lowest number of TAS taxi wheelchair members per capita of the four cities and is below the average for the state as a whole. When the first WAT comes into service it will have 133 wheelchair-reliant members for one WAT. However, to date, the existing SPC is reportedly under-worked and is only redeeming an equivalent of 2.5 wheelchair-endorsed TAS taxi vouchers per day. Redemptions have grown only slightly over the last year.

The majority of the wheelchair work done is for the elderly, with reportedly 85% being for people in nursing homes. Most of this work, approximately 90% according to the operator, is for pre-booked work.

Table 16 summarises the changes in wheelchair-dependent passenger activity using the three-month periods July-September 2004 to July-September 2005 based primarily on voucher use.

Table 16. Change in wheelchair-dependent activity based on voucher redemptions, Devonport

	Standard cab	SPC	Total
2004	425	205	630
2005	420	230	650
Change	-1%	+11%	+3%

Source: Estimate by SGS Economics & Planning based on DIER voucher redemption data, samples of standard and SPC voucher redemptions enumerated by SGS

The table shows a very small change in wheelchair-endorsed voucher redemptions. The growth was

in the SPC/WAT area, with a small decline for standard cabs. The fall is smaller than the estimating error and is unlikely to be significant. The growth in redemptions is of the order of size of the growth in TAS taxi wheelchair-reliant membership. Given no change in service provision, this is in line with expectations.

Voucher redemption per TAS taxi wheelchair-reliant member is the lowest for any urban area in the state. Thus Devonport combines a lower level of TAS taxi membership with a lower level of activity per member in the taxi sector. The extent that this is attributable to a well-served community transport sector or a lower perceived standard of service to wheelchair-dependent users is not apparent. It may also suggest that if users were to find a new WAT service attractive, there is significant scope for growth in use.

4.3.3 Launceston

Launceston has 91 standard cabs which predominately operate through two main radio rooms. Currently, two WAT operators provide both WAT and SPC type transport, although the second operator only began WAT service in November 2005. Eight of the nine Launceston WAT licences were issued to one operator in Launceston who had eight SPCs. Four came into service in 2004 and four in 2005. All are FIAT Ducatos.

The latest WAT to enter service is a Sprinter operated by the second operator, the first chance for users to experience a different operator and vehicle type.

With the introduction of the 9 WATS, there has been a reduction of SPCs from 8 to 3, plus one wheelchair-accessible vehicle operating under a standard licence. However, compared to the situation pre-WATS, there are now 50% more wheelchair-accessible vehicles in service. Operators report that the level of activity of SPCs is low and in one case, 2 SPCs are primarily being kept in service to provide hoist service for clients that need or prefer it.

Community transport is also active in Launceston. While the total number of wheelchair-accessible vehicles available in the community transport fleet is not documented, at least four are known.

Launceston has the highest number of TAS taxi wheelchair-reliant members per capita of the four cities and is nearly double the average for the state as a whole. When the first 9 WATs are in service Launceston will have 86 wheelchair-reliant members for each WAT. However, trip rates in Launceston are higher than average.

Operators report that during the day this is indeed the case, with WATS doing primarily wheelchair work and keeping busy, redeeming the equivalent of over 5 wheelchair-endorsed TAS taxi vouchers per day. However, earlier in the year the number exceeded 9 per day. As the fleet has built up during 2005, the number of vouchers redeemed grew but has not increased significantly since April, even though the number of vehicles nearly doubled since then.

The largest operator in Launceston is well-established has developed relationships with many nursing homes and schools, making up 25% and 20% of their total work. This operator also strongly advocates booking ahead to clients, and reported that nearly all did so. (The issue of needing to book ahead was mentioned more often by survey respondents in Launceston than in

any other city.) This is not consistent with the objectives of the DDA which requires that wheelchair-dependent clients should be able to get a taxi as quickly as non-wheelchair dependent persons when booking on an as soon as possible basis. This operator also reports relatively high distances travelled by his vehicles, with standard taxi work actively pursued in periods without wheelchair bookings.

Table 17 summarises the changes in wheelchair-dependent passenger activity from 2004 to 2005. Redemptions have grown very strongly over the last year, nearly as strongly as Burnie. As with Burnie, growth occurred in both wheelchair accessible vehicles and standard cabs, in a roughly similar pattern. However, unlike Burnie, which showed a cessation of SPC activity, in Launceston SPCs still account for a significant proportion of redemptions.

Table 17. Change in wheelchair-dependent activity based on voucher redemptions, Launceston

	Standard cab	SPC	WAT	Total
2004	1350	2050	0	3400
2005	2000	400	3200	5600
Change	+50%	+80%		+65%

Source: Estimate by SGS Economics & Planning based on DIER voucher redemption data, samples of standard and SPC voucher redemptions enumerated by SGS

As with Burnie, the growth is far larger than the growth in TAS taxi wheelchair-reliant membership. It is likely that there has been a growth in activity or some transfer from the community transport sector.

Launceston in 2005 had the highest number of voucher redemption per TAS taxi member in the state, a significant increase in both total number and its relative standing compared to other cities.

4.3.4 Hobart

Over 200 standard cabs operate in Hobart with the majority aligned to one of the three major radio rooms. None of the SPC operators in Hobart took up the offer to apply for WAT licences, with many licences going to operators new to the taxi industry. Ten SPCs were operating in Hobart prior to the WAT rollout operated by three companies. While that number has been reduced to eight, only three will be operating a taxi-style service.

As of November 2005, 12 WATs were on the road in Hobart, with an additional eight expected by early 2006. For the supply of wheelchair-accessible vehicles providing a taxi service therefore, this represents an increase from the previous 10 SPCs to a total of 23, or approximately 10% of the total taxi fleet in Hobart.

Community transport does not appear to be as extensive in Hobart as the other three cities, certainly not on a per capita basis.

The current level of 12 WATs corresponds to 112 TAS taxi wheelchair-reliant members per WAT in service. Operators report a range of experience from not having anything like enough wheelchair work to having too much and looking for additional capacity. With the expansion to 20 vehicles, there will be 67 TAS taxi wheelchair-reliant members for each WAT.

Like Launceston, Hobart experienced a strong growth in WAT voucher redemptions for the first part of 2005, but the number levelled out, even as the fleet continued to grow in the later part of the year. Voucher redemptions per vehicle peaked at about 5 per vehicle per day mid year but have since declined to about 3½. With the overall number of redemptions not increasing in recent months, the addition of another 8 WATs will bring this close to 2 wheelchair-endorsed vouchers per vehicle per day unless total volume increases.

Even at current levels most WAT operators must seek non-wheelchair work to be viable in Hobart.

Table 18. Change in wheelchair-dependent activity based on voucher redemptions, Hobart

	Standard cab	SPC	WAT	Total
2004	4150	2250	0	6400
2005	3750	600	4050	8400
Change	-10%	+110%		+30%

Source: Estimate by SGS Economics & Planning based on DIER voucher redemption data, samples of standard and SPC voucher redemptions enumerated by SGS

The growth in total volume of wheelchair-endorsed vouchers has been smaller in Hobart than in Launceston and Burnie. The fleet has grown as much proportionately as in Burnie but less than in Launceston. Activity per member is relatively strong, with the second highest number of vouchers redeemed per member after Launceston. However, whereas Launceston grew substantially in activity per member over the year, Hobart did not.

5 User consultations

5.1 User surveys

5.1.1 Myriad user survey 2005

A survey of wheelchair-reliant members of the TAS taxi scheme was conducted to assess the degree to which wheelchair accessible taxi (WAT) services meet the needs of users in metropolitan areas of the state – Hobart, Launceston, Devonport and Burnie. The research focused particularly on the key attributes of:

- availability
- response times
- driver courtesy and attention to needs
- ride comfort and convenience
- perceived safety
- value for money

The survey also covered transport patterns generally, service expectations and comparisons with earlier times (SPC transport before the introduction of special purpose wheelchair accessible taxis in 2004).

The random telephone survey was conducted by the Myriad Research field team during late October 2005, with a target sample 200 respondents. Respondents were selected from a list of wheelchair-reliant members of the TAS taxi scheme provided by DIER. Interviews were conducted based on a structured questionnaire developed by the consultants in conjunction with the DIER Project Team (Passenger Transport Policy Branch personnel).

Respondents needed to be wheelchair-reliant members, aged 18 years plus, living independently and not working for a taxi company or for DIER. Some interviews were conducted with the carer of the listed member (if the carer had travelled with the member in a WAT on the last trip taken).

There was a significant number of exclusions from the contact list provided due to a number of factors – non listing/availability of phone contact, nursing home residents (combined close to 50% of total contacts provided) and not wheelchair-dependent (as reported by potential respondent – close to 30% of total contacts made).

The final survey sample of 177 respondents was distributed as shown in Table 18. Appendix A provides the complete Myriad Research report on the survey.

Table 19. Survey sample distribution

	Frequency	%
Hobart	93	52.5
Launceston	58	32.8
NW	26	14.7
Total	177	100.0

5.1.2 Earlier surveys

The survey was a follow-up and provided a comparison with earlier surveys conducted by Colmar Brunton for DIER – a National Taxi Users Survey (2002) and a ‘baseline’ survey of SPC/maxi taxi users in Tasmania (2003).

The national survey of taxi customers was conducted in November and December 2002, under the guidance of the National Taxi Regulators Group. The survey provided nationally comparable data on a range of service and attitudinal measures for the Tasmanian (standard) taxi industry.

DIER also commissioned a survey of wheelchair taxi users in 2003 prior to the introduction of WATs. This survey provides a snapshot of users’ experiences and expectations. It was conducted to enable a comparison to be made between the experiences of wheelchair users and those of standard taxi users collected in the 2002 National Taxi Users Survey.

The 2003 survey provides baseline information against which the effectiveness of WAT services can be now assessed. It found that the wheelchair accessible vehicles did not, in general, provide equivalent transport to users of standard taxis particularly in the areas of availability, cost and value for money. A significant proportion of survey respondents reported that they would not use an SPC for reasons including cost, safety, driver attitudes, discomfort and lack of availability.

According to the survey, wheelchair-dependent passengers experienced difficulty in accessing SPC services ‘on demand’. The survey found that many users needed to pre-book, often a day or more in advance, to ensure travel. Users also expressed concern that drivers were not adequately trained in communicating with and transporting people with disabilities.

The current survey has been designed to provide comparability with the earlier findings. However, in conducting the current survey, greater care was taken to screen non-wheelchair-dependent members from the sample. The earlier survey did not do this. Given the large proportion of non-wheelchair-dependent members in the list supplied, this reduces the confidence in making direct comparisons with the previous survey, which would have included a significant proportion of members who were not wheelchair-dependent and would not have been relying on SPCs.

5.2 Discussions with advocacy groups

In addition to the survey, discussions were held with a range of advocacy groups with an interest in transport for wheelchair-dependent persons. The sessions with advocacy groups were designed for the consultants to gain an understanding of the main issues involved in the availability of transport for people reliant on wheelchairs, in particular, the provision of wheelchair accessible taxi (WAT) services in Tasmania. The sessions covered the organisations' experience with wheelchair accessible transport for its members, what changes have been noticed over recent years, any regional differences, and an assessment of key components of the service delivery (refer to Appendix B). The sessions comprised two forums and a series of in-depth interviews with the groups listed in Table 20.

Table 20. Advocacy groups consulted

Organisation	Format	Attendance	Date
Paraquad	forum	6	11 Oct
Tasmanians with Disabilities	forum	5	18 Oct
ACROD (see below)	interview	1	13 Oct
Disability Services Ministerial Advisory Committee	interview	1	14 Oct
MS Society	interview	1	12 Oct
Headway	interview	1	12 Oct
Tasmanian Pensioners Union	interview	2	14 Oct
Aurora Disability Services	interview	1	16 Nov
Cosmos	interview	2	13 Oct
Cay-lee Home (Anglicare)	interview	1	14 Oct

In order to gain additional response from advocacy groups and service providers, ACROD distributed a survey questionnaire to its members statewide. A total of 8 responses were received from the following organisations:

- Optia Inc
- Northern Residential Support Group
- Star Tasmania Inc
- Kalista Ltd
- Supported Housing Inc
- Paraquad Tas
- Cosmos Inc
- Multicap (Burnie Division)

Responses to the ACROD distributed survey are provided in summary form – refer to Appendix C.

The forums were conducted with executive staff of the relevant organisations, together with a number of their members. The interviews were conducted with senior personnel involved in transport issues for members. The comments from these discussions are included under the headings below in conjunction with the reporting of the survey results.

5.3 Main findings of the user survey and consultations

Overall there was a very high level of satisfaction expressed with WATs in Tasmania in virtually all dimensions of service. In virtually every dimension of service probed, over 90% of respondents rated service as good to very good in every region. This is extraordinarily high compared to most consumer services, but notably, is consistent with the high ratings received for the standard taxi industry in the 2002 survey.

Most respondents also felt there had been an improvement in service in the last 18 months in all regions, though most strongly in Hobart and somewhat less so in the northwest. In virtually every aspect of service, respondents to the survey reported that service was the same or better, with more reporting better in most regions for most service attributes. There were very few reporting that it was worse, and these were mostly in Launceston (availability and timeliness). The improvements were also strongly emphasised by the consultations with advocacy groups with comments such as:

- “A quantum leap forward for disabled transport”
- “WATs have changed our lives”

Nearly all of respondents (92%) reported that they were satisfied or very satisfied with their last wheelchair taxi trip with only two respondents being dissatisfied or not at all satisfied by their last trip. However, while satisfaction levels are high, a portion of respondents still reported poor availability, and contrasted that with the availability of standard taxis. In particular, advocacy groups reported the need to book a day ahead although sometimes you could book the same day and get a WAT. This was confirmed by survey results. **Thus in spite of high reported levels of satisfaction, this still does not comply with DDA requirements.**

However, at least some of the survey responses referred to times either before the current WATs were introduced or very early in the introduction stages. Also, in none of the regions have all of the currently committed WATs been put into service. In some cities there will be a 60%-100% increase in capacity compared to the period before the survey was conducted. Availability should improve further once all WATs are on the road. However, comments about lack of availability were most common in Launceston, where the smallest percent increase in WATs will occur (about 33% increase from the capacity available in the month before the survey).

5.4 Detailed Findings

5.4.1 Availability

A high proportion of users pre-book. The proportion is highest in Launceston (87%) where the operator strongly encourages this but was also high in Hobart and the Northwest (both 82%). Of these, just less than one quarter are regular bookings and a similar number are booked on the same day as the ride is needed. Broadly Launceston has the longest booking lead times, except for the large proportion in the northwest that book over one week ahead (33% of those that pre-

book). The reported rate of pre-booking has actually increased compared to the 2003 survey where only 59% pre-booked, but this probably included a higher proportion ASAP bookings for standard cabs.

State-wide, 85% of respondents rated **availability** as good or very good for their most recent wheelchair taxi trip. This was higher in Hobart (89%) and lowest in Launceston (80%). Two respondents in Hobart (4%) and two in Launceston (5%) thought the availability was below average or poor. In Hobart, 63% thought it was better than 18 months ago, in Launceston 59% and in the northwest 25% thought it was better. Only one respondent in Launceston thought that availability was worse than 18 months ago.

In a later question where respondents were asked their preferred form of transport, 4 respondents in Launceston (7%) said they preferred standard cabs because they could get them more easily than WATs and there was no need to pre-book. These comments were not made in other regions.

Comments about availability included that they are hard to get at 4-5 am and that they should usually be on taxi ranks but are only there occasionally.

17% of users stated that they could not get a wheelchair accessible taxi at some time in the last 6 months. This is slightly down from 18% in 2003. Launceston had the highest rate of non-availability (19%) but regional differences are small and not necessarily meaningful.

This may in fact understate the proportion of times when wheelchair accessible taxis are not available as many respondents had not tried to obtain one. Once this is corrected for, 29% of respondents who tried were unable to obtain a ride when requested at some time in the last 6 months. Regional variations are reduced to insignificant levels.

The *2002 National Taxi Users Survey Report* showed that for standard taxis, 18% of potential clients in Hobart could not get a standard cab when they tried, and 15% in Launceston. Thus the reported rate of failure to get a booking for WATs is roughly 70%-100% higher than the 2002 rate reported for standard cabs.

The fact that WATs are still not as available as standard taxis was raised by the advocacy groups. While all agreed there had been a massive improvement since pre-WAT days, they still considered that booking ahead was necessary. However, in pre-WAT times you had to book days ahead now you could book a day ahead or even the same day and get a WAT. Significant differences in response times between operators were also noted in Hobart. Peak times and out of hours availability were poorest.

One organisation that previously used SPCs heavily noted that availability seemed to have become harder at peak times. They previously pooled rides, with the SPC picking up several clients on a run. They now operate their own fleet of three wheelchair accessible vehicles.

To some extent pre-booking may be a habit retained from when it was necessary with SPCs, where you would have to ring one to three weeks in advance. Some forum participants considered that often they would plan their week in advance so it was just usual to do so. Thus the proportion of those booking in advance is not a reliable measure of service levels, rather the response time for those

that do book either short notice or ASAP is more meaningful.

5.4.2 Response time

Response to pre-booked

Respondents reported that 90% of the pre-booked wheelchair taxis ordered (last trip) arrived early or on time. This was highest for Hobart (94%) and lowest for the northwest (89%). Of those that were late, one was 5 minutes late and all of the others but one were 10-20 minutes late, the exception being 55 minutes late. Late arrivals were most common for 9:00 am requests on weekday mornings.

In general there is an acceptance of some **delay in arrival** even for pre-booked taxis. Arrival within 5 minutes of the booked time was accepted by 80% of respondents, and within 10 minutes was accepted by 64% of respondents. Only 13% of respondents would accept a delay of up to 15 minutes. These acceptance of delays for WATs is generally higher than those reported in the 2003 survey. This may reflect differences in the screening of respondents.

Broadly these expectations of delay are comparable to those considered acceptable by people waiting for a standard cab **on ASAP calls** and roughly double the 5 minutes considered acceptable by the majority of people for standard cabs that are pre-booked.

Expectations of punctuality were higher in Launceston and lower in the other two regions.

Response to ASAP requests

For the 14 **ASAP requests**, 43% arrived within 10 minutes and 71% within 15 minutes. The sample is too small to make meaningful comparisons between regions. Slow responses (30 minutes or more) occurred mostly on afternoons from 2:00 to 4:00 pm. These response times are above the times considered acceptable to respondents, and well below those considered acceptable to users of standard cabs. While directly comparable data between WAT ASAP response times and standard cab response times is not available, it appears from available evidence that **parity is not currently being met and that users do not expect this to be met at this time.**

In rating their last wheelchair taxi trip for **response time** (for both pre-booked and ASAP trips), 89% thought it was good or very good. This was highest in Launceston (92%) and lowest in the northwest (82%). Two respondents in Hobart (4%) thought response time was below average or poor, and one in the northwest (9%). Hobart was considered to be the most improved (61% thought it had improved). Only one person in each of Launceston and Hobart thought response times had got worse since 18 months ago.

Directly comparable data between WAT ASAP response times and standard cab response times is not available. As such, it may be that while standard cab users may have high expectations about fast responses, they may not actually be met.

However, it is evident that:

- The performance of pre-booked WATs is generally within expectations with a high proportion on time
- Wheelchair-dependent users have significantly lower expectations about ASAP response times than standard cab users
- There was some evidence that even these expectations are not being met by WATs on ASAP calls
- Wheelchair-dependent users still report standard cabs come more quickly than WATs to ASAP calls, on average

5.4.3 Courtesy

Courtesy when booking

Levels of courtesy when booking were rated positively everywhere, i.e. 98% rated as good or very good. In Hobart, 96% of responses were positive, while 100% of responses in the other three regions were positive. No one thought courtesy when booking was below average or poor. Statewide, 43% thought that this was improved over 18 months ago, with the greatest improvement in Hobart. No one thought it was worse.

Driver courtesy and attention to needs

Driver courtesy was always reported positively, with 96% of respondents reporting good or very good ratings. This time however, Hobart had the highest rating at 98%, and the northwest the lowest at 91%. Hobart was the most improved, with 66% saying it had improved since 18 months ago. No one thought that driver courtesy was below average or poor. One person in Launceston thought it had got worse.

One person commented that drivers get frustrated with their particular type of wheelchair. Another said the driver was 'pompous'.

Statewide 94% of respondents stated that driver attention to their needs was good or very good, with the northwest region being below average at 82%. Only one Launceston respondent (3%) said this was 'below average'. Hobart showed a strong gain from 18 months ago at 62% saying it had improved. There were no responses saying that this had gotten worse in the last 18 months.

Some advocacy groups stated that drivers were not adequately trained in understanding the different needs of people with different disabilities. One stated their belief that the current WAT driver training did not have adequate input from a broad enough cross-section within the disabled community. Some noted that this training should be extended to be included in the standard taxi driver's training course. One group stated that there was still a proportion of their membership that would not access WATs as they were fearful that drivers would not understand their "situation".

This said however, the majority of advocacy groups stated that WAT drivers were much more attuned to the needs of users than was previously the case with SPC drivers or standard taxis. Often it was reported that drivers went “out of their way” to be helpful and were generally very courteous.

5.4.4 Ride comfort and vehicle type

Ride comfort and convenience

Survey respondents gave ride comfort a rating of good or very good 91% of the time, with Hobart rating 93%, the northwest 91% and Launceston 87%. Two respondents in each of Hobart (4%) and Launceston (5%) thought ride comfort was below average or poor.

About 64% of respondents thought ride comfort was better than 18 months ago, with 79% considering Hobart had improved. No one thought ride comfort worse than 18 months ago.

Comments made by respondents suggest that they know the more comfortable vehicles and choose to call the companies that have them. In particular, it was noted that riding at the back of the vehicle is not comfortable, and that some vehicles are bumpy or rough, or bigger vans sway.

WAT vehicle characteristics

The majority of rides were entered by a ramp at the back of the vehicle. Only Hobart had many side entries (21%). The northwest had a higher proportion of hoists (27%), most likely reflecting the continued operation of SPCs in Devonport, and about 10% of Hobart and Launceston also used hoists.

Statewide 23% of respondents expressed a preference for a hoist over a ramp, but only 12% expressed a preference for side entry over rear entry.

The convenience of entry and exit was rated good to very good by 92% of respondents. The rating was highest for Launceston (97% rear entry Ducatos). Hobart showed the greatest improvement of 66% compared to 18 months ago.

The focus groups had specific comments about different vehicle types. In general they were highly critical of the old SPC formats and rated all WAT vehicles as superior. However, they noted that some WATs gave a rough ride where the passenger is located over the rear axle. Ducatos were given the poorest rating for comfort, and the Grand Voyager the highest. The old Commodore stretch cab, which operated as a standard cab (although wheelchair accessible) before becoming an SPC, was noted as being particularly comfortable with easy loading and good passenger positioning.

It is clear from the survey responses that different people have different preferences about vehicle

characteristics. Some prefer a side entry even though the majority prefer rear. Some prefer a hoist even though a majority prefer a ramp. A 'hoist-ramp' or a low-angled ramp are the apparent overall preference. Clients with particularly large or heavy wheelchairs find only a few vehicle types can accommodate them. A number also stated that they preferred to sit in the vehicle passenger seat, not their wheelchair, especially on longer trips.

5.4.5 Value for money and affordability

Across the state, 87% of respondents thought the value for money was good or very good. The proportion was lower in the northwest at 82%. The proportion saying there was improvement compared to 18 months ago was modest, 38%, but as with other factors assessed, Hobart had the highest proportion saying there was an improvement at 45%.

Affordability was not an issue raised in the user survey, but it was with advocacy groups. Some advocacy groups mentioned that though the subsidy made a difference, the cost was still prohibitive for some of their clientele. Part of this was that those for who rely on WATs to meet their regular transport needs particularly if working, attending training courses or for multiple medical appointments, even paying 40% of the fare was very costly. One group suggested that the fare should be the equivalent to a bus fare, based on their belief that they bore the "extra cost of disability". Given the cost to individuals of using WATs, one stated that there was an unmet demand for wheelchair accessible buses capable of taking groups.

5.4.6 Perceived safety

Respondents perceived a high level of safety, with 94% rating safety as good or very good. This was highest in the northwest (100%) and lowest in Launceston (90%). Two Launceston respondents (5%) considered safety to be below average.

Hobart was considered to be most improved (68%) and Launceston had one person (4%) that thought safety was poorer than 18 months ago.

5.4.7 Other findings

Pattern of activity

Survey findings showed a pattern of demand very similar to that revealed by the analysis of voucher use. It is not directly comparable as many older users resident of nursing homes are excluded, and it includes use of all types of wheelchair accessible vehicles including SPCs.

However, the lower level of activity per respondent in the northwest region is consistent with the voucher redemption data, as is the higher level in Launceston.

Other means of transport

In the past six months 84% of respondents to the survey used some other means of transport besides wheelchair accessible taxis. Some of these were other forms of, potentially, wheelchair accessible transport including buses (6%), community transport (7%) and nursing home, ambulance or group transport vehicles (5%). Mostly transport was in cars, whether a family or friends car (63%), a standard taxi (27%) or a car they drove themselves (15%). The breakdown was roughly similar across regions for most options, except that in the northwest, community transport was much higher (27% compared to 7% statewide).

In spite of the wide variety of transport used, respondents nominated WATs as their preferred form of transport most often, nearly half of the time (49%). Next most popular was the family car (25%) followed by standard taxis (14%). WATs were less preferred in the northwest at 31%, probably a reflection that there was no WAT in Devonport at the time of the survey. The northwest had a correspondingly higher preference for other forms of transport and a much higher dependence on friends and relatives cars (31%) than other regions.

For 35% WATs were seen as a last resort when nothing else is available. This was lower in Hobart (31%) and Launceston (29%) and much higher in the northwest (58%), again a reflection of the lack of WATs in Devonport. It is notable that some of the negative comments about 'WATs' referred to events that occurred before the introduction of the new WAT vehicles or when there were very few: 'Had to wait 2½ hours for a WAT to arrive last year. In the end I called a standard cab instead.'

A significant minority (15%) indicated that WATs were their **only** option for transport.

6 Industry perspective

6.1 Conventional cab operators

6.1.1 Over-riding concerns

The principal concern of the taxi industry is that there are too many taxis on the road now, affecting viability, income, standard of vehicles, standard of drivers and quality of service.

The industry's view is that no *additional* licences should be issued of any kind. If additional WATS licenses are issued, they should replace existing standard cab licenses.

6.1.2 View of WATs

Conventional cab operators spoken to agreed there was a role for WATs. In particular, they identified their own difficulties in carrying wheelchair-dependent people, even where they could transfer into the cab:

- Inability to store the wheelchair in the boot if fitted with LPG without having the boot open and risking scratches to the boot lid
- Damage to the seat if the wheelchair is stowed in the back seat
- Damage to the door (realignment costing \$70) after passengers lean hard on the door during transfers

In spite of these problems, cab drivers report carrying significant numbers of wheelchair-dependent passengers. In part they claim this is due to the fact that WATs are unacceptable to some wheelchair clients. They believed that many wheelchair-dependent people did not want to be seen riding in a vehicle that was distinctly different to that which other people used.

As far as the effectiveness of the current WATs implementation is concerned, it is the view of part of the industry that to be effective, WATs need to be coordinated by a central radio room. They believe this would avoid inefficient co-ordination and deliver the best response times.

The DDA legislation specifies that the radio rooms are responsible for meeting the objective of having the same response time for wheelchair clients as for non-wheelchair clients. Radio rooms are not themselves fleet operators but separate businesses providing dispatch services to operators. If a radio room is unable to attract sufficient WAT operators to their 'stable', they may not be able to achieve this for their fleet, or exert any influence over the response time in general.

Industry representatives also expressed concern that WAT operators were not always providing service to wheelchair passengers as a priority, but competing with standard cabs on ranks, at the airport, etc. This could reduce the response time even where there is in principal sufficient capacity. Radio rooms operating standard cabs reported that when a WAT was waiting for a wheelchair job it would also be in the queue for standard work. With a smaller number of WATs

this may lead, on occasion, to the situation where none are available for ASAP wheelchair jobs, which would affect response times.

One particular concern from the standard operator/drivers was that the maxi-taxi work that WATs were doing was reducing their number fares, particularly of a Friday and Saturday night. They considered that the general public's perceptions about WATs were changing and that increasingly groups of people were using WAT's maxi-taxi capabilities rather than taking multiple cabs as it was more cost effective. One standard operator believed that the fact that WATs were doing such work reflected the fact that they were at their saturation point and that additional WATs would take further work away from standard cabs.

There were many reports of fraudulent use of TAS taxi vouchers which one standard cab operator believed that 10% of the cost of TAS taxi scheme was due to fraud. In particular, they believed wheelchair-endorsed vouchers were being misused by operators, drivers, and even TAS taxi members. One example given was where standard cab operators sell them to WAT operators to get cash in hand. One operator asserted that WAT operators masked the low level of service provided to wheelchair clients by buying wheelchair-endorsed vouchers from standard cabs.

6.2 WAT operators

6.2.1 Mix of Work

The proportion of wheelchair work varies from operator to operator and between regions. A few operators report doing all or almost all wheelchair work. In general, operators report that 40-50% of WATs total work is for wheelchair-dependent passengers, with the remainder being standard trips.

Some WAT operators are explicitly making their vehicles available only for wheelchair work as they believe that operating a large vehicle as a standard cab is uneconomical. A standard cab is less expensive to run than a WAT given that its fuel costs is usually lower, as are the cost of tyres, repairs, spare parts and general maintenance. A second hand vehicle appropriate for standard taxi work can also be purchased at around about \$6,000, compared to a WAT vehicle, which typically costs at about ten times as much.

Operators focusing exclusively on wheelchair work are typically doing 20-50 per cent fewer kilometres than other WAT operators. They appear to be more content with the profitability of their WATs. Some WATs in Hobart report very low levels of wheelchair work, in spite of intentionally targeting this work.

6.2.2 Changing demand

In Hobart the wheelchair accessible taxi market is greatly different now to what it was when SPCs were the only vehicle providing wheelchair transport. Most of the operators are new. One operator noted that users were very happy with the level of service now provided by WATs as compared to

that provided by SPCs. Demand for wheelchair services has reportedly grown in Hobart due to this.

In the other three cities however, the operators and number of vehicles providing wheelchair services is more or less the same. The only significant change is in the type of vehicles. WATs there were taken up by former SPC operators so all operators had a previously established base of customers. However, they all reported that the number of TAS taxi members, and numbers using WATs were growing all the time.

Operators report between 50 and 70 per cent of their work is for the elderly. Much of this work is for nursing homes, more of which now rely on WATs rather than provide their own transport.

6.2.3 Pre-booked and ASAP bookings

Hobart is the only region where operators report that ASAP bookings are becoming more prevalent. In Burnie and Devonport, given that both have only one WAT, it is difficult to guarantee good response times for ASAP bookings. This is one reason why customers often are encouraged to book in a day in advance. This said however, both Devonport and Burnie WAT operators report very low usage of their vehicles by wheelchair-dependent customers. They reported doing between one and four round trips a day, which is confirmed by an analysis of their voucher redemption rates. Their vehicles should be able to deliver good response times in these conditions.

One Launceston operator reported that "99 per cent" of bookings were still made in advance and that they had not noticed any growth in the number of ASAP bookings. In part the prevalence of pre-booked journeys also reflects the user group's tendency to book in advance either as they were used to doing so with SPCs, or because of the preference of planning their days ahead of time. However, it also could be argued that it is a sign that supply has not yet met demand.

6.2.4 Peak demand management

Two peak periods of demand during weekdays in Hobart and Launceston were identified, between 8 and 10 am and between 2 and 4 pm. These times coincide with the start and end of a school day. Many operators report that they have regular bookings for these times for students. One Hobart-based advocacy group found it was difficult to make a permanent booking during these times let alone get an ASAP booking. Some advocacy groups acknowledged however, that such were the poor response times and availability of SPCs that they gave up relying on them and have sought other means of transport. They were therefore unaware that wheelchair accessible taxis had become more available.

In the Hobart market, one SPC operator reported that before the WAT rollout, SPC operators would often refer customers to each other during times of peak demand. This may have been partly due to the fact that demand for wheelchair-accessible taxis far exceeded supply at this time. While one WAT operator said that he referred customers to another operator when his company was unable to meet demand, referring customers to other companies does not seem to be the norm with WAT operators. Part of this reflects the fact that generally it is reported that demand can be met. Operators stated that what ASAP bookings they did receive, they estimated response times were

typically between 10 to 15 minutes. This is consistent with user survey findings.

However, for the majority of WAT operators, response times were not considered an issue, given the predominance of pre-bookings.

6.2.5 Multiple passenger trips

One operator raised the fact that the fare structure provided no incentive for WAT operators to take more than one wheelchair at a time. They said that a "higher occupancy" fare needs to be introduced to encourage them to do so. As a result of the current arrangement they would make two trips rather than one. The operator highlighted the point that if he could make one trip at a higher tariff it would be less costly to the user, TAS, and more profitable for WAT operator. One solution may be to allow drivers to charge tariff four for two wheelchairs.

6.2.6 Viability

There were mixed views expressed by operators about the viability of WATs. Some considered that they were not getting enough wheelchair work to remain viable. One believed that they were losing work to SPCs that were still doing a "considerable" amount of wheelchair work. Another stated that it was due to the fact that not all operators were mentioned by DIER in a letter sent to TAS taxi wheelchair-reliant members which listed WAT operators.

Given the perceived lack of wheelchair work in most regions it is not surprising that not many operators expressed enthusiasm about obtaining additional licences. Those who did express interest typically regarded it as a means of securing or expanding their market share.

Some operators were concerned about the high cost of their vehicles and pointed to some cheaper vehicles that were being put on the road. One operator is seeking to put lower cost SPC type vehicle not complying with WAT specifications on the road to improve viability.

Some operators expressed concern about the lifetime of WAT vehicles, particularly if they are used heavily for non-wheelchair work where they are getting low returns but doing long distances. They expect the vehicle will have to be replaced well before the ten years is up. As there is then a high replacement cost but no value in the licence, they need to make higher returns in the short run.

All operators expressed their belief that the trip fee was a necessary and successful policy for both creating the incentive for doing wheelchair work and also for the part it played in paying off the higher cost of the vehicle. It is not available for non-wheelchair fares, so if the number of wheelchair trips per WAT goes down, it will affect viability.

6.2.7 Successful strategies

Operators which appeared to be more "successful" as operators tended to be able to rely on, and capture, a higher number of wheelchair jobs. These operators can be identified by higher redemption rates and lower kilometres per WAT. One operator pays the driver a percentage of the trip fee which is a strong encouragement for them to make wheelchair trips a priority.

The majority of WAT operators reported that they did not share their trip fee with their driver(s), stating that they used it to cover the high capital and ongoing costs of the car. This gives drivers relatively little incentive to make wheelchair jobs a priority and may encourage drivers may make themselves available for radio work or rank work if they do not receive a share of the trip fee.

While a driver which does not receive a share of the trip fee gets 50% of what would be a higher tariff for doing a wheelchair job, tariff 3 instead of tariff 1 or 2, this incentive may not be sufficient to ensure that they make themselves available for wheelchair work. Many within the taxi industry have reported that WATs do a large amount of maxi-taxi work, i.e. trips with five or more passengers. For doing such a trip, a driver would get tariff 4 which is not only a higher tariff than a wheelchair job, but also perhaps not as time consuming in terms getting a wheelchair-dependent passenger in and out of the vehicle.

6.2.8 References to fraud

WAT operators acknowledged that there were some issues with the voucher system and that fraud was indeed possible. Most were of the belief that these issues would be addressed by a swipe card system, while some had reservations about the system. One operator claimed that it wouldn't work because TAS taxi members would often forget or not carry their card. Some operators were of the belief that if their drivers participated in fraudulent behaviour then it was not the responsibility of the operator to stop it.

References were also made to operators who operated both SPCs and WATs but claimed all vouchers as WAT journeys. Some were annoyed about the length of time it was taking for the swipe card system to come into place.

6.2.9 Other issues

Launceston, Burnie and Devonport operators reported that it was not only costly but also inconvenient to send their drivers to Hobart for both the three-day taxi **training** course for their taxi licences and the one day WAT-specific training course as part of the accreditation process. They felt that this cost was difficult for them to bear given that most of their drivers were part time and hence they needed to pay for training for two to three drivers per vehicle. Some expressed their opinion that given that their drivers did not do standard trips, they felt it was unnecessary for them to do the standard course. Others suggested that the WAT training could be held in conjunction or immediately after the other training course to save two trips being made. Another problem with training, which was expressed by many operators, was the issue of lengthy periods between training sessions. This was due to the fact that sessions would only be offered if there were more than a certain number of drivers.

In spite of these training commitments, all operators reported that they provided in-house training. One operator suggested that rather than having training centralised, DIER could provide individuals to provide training within each company.

Some operators expressed their annoyance that **trips fees** were no longer adjusted for inflation,

as they had been informed was initially the case.

7 Analysis and conclusions

7.1 Expected future demand

7.1.1 Number of wheelchair-reliant members

There are clearly a substantial number of TAS taxi members endorsed as wheelchair-reliant that do not need to use a WAT because they do not use a wheelchair. The current mail out to members to confirm that they require a wheelchair is likely to reduce wheelchair-reliant membership numbers by about 20%-25%. However it is likely that the majority of vouchers redeemed by this group has been through standard cabs, so reducing the number of wheelchair-reliant TAS taxi members by this amount is unlikely to reduce the number of TAS taxi wheelchair-endorsed vouchers redeemed by WATs by anything like this amount. A reduction of 5% from this reclassification is more likely to be realistic.

Membership numbers may be reduced further by the elimination of non-respondent members. These are most likely to be deceased or moved interstate. In either case their elimination from membership will have no effect on demand for WATs as they are currently not active.

When operators report that a TAS taxi member has presented in a wheelchair but they do not have wheelchair-endorsed vouchers, they stamp them and submit them as endorsed vouchers. DIER is proposing to re-classify these members based on mailing out a request to confirm they are reliant on wheelchair for mobility. This will increase wheelchair-endorsed membership. However, as these members are already travelling in WATs and receiving the benefits, there will be little change in WAT usage from this reclassification. A small increase may occur if these members become more confident users because they have the endorsed vouchers.

The combined effect of these changes is likely to be a small reduction in total active members, probably less than 5%.

The findings of chapter 3 suggest that there are a significant number of wheelchair-dependent people who are not members of the TAS taxi scheme. WAT claims show only 1.5% of TAS trip fees are paid for wheelchair trips where the client is not a TAS member. Growth in membership from this latent demand is likely to be very small as most of these are expected to be elderly or have particularly low mobility.

Growth in wheelchair-reliant member numbers is otherwise expected to continue based on the ageing of the population. Recent experience has shown growth in wheelchair dependence has been slower than growth in disability or TAS taxi membership in general. Growth in the wheelchair-reliant TAS taxi membership last year was 2.3%.

7.1.2 Intensity of use

Transport that is attractive to wheelchair-dependent persons and more readily available will lead to some increased propensity to travel. This has already been seen in areas where WATs have been introduced. It is likely that there will be some further growth but it may well be modest compared to the growth to date in all areas except for Devonport because until recently there has been no WAT. The ultimate extent of growth will be constrained by the ability of clients to pay their portion of the fare. That is, although wheelchair-reliant clients may be using WATs more often than they would have used SPCs because they much prefer travelling in them, given that many are on low incomes they cannot afford to use them as frequently as they might like.

In addition to TAS taxi members making trips at their own initiative and share of the cost, WATs are used by other agencies to transport school children or clients to care, hospital patient discharges, or other services. These fares may be fully paid for by agencies such as DVA, MAIB or the Department of Education although DIER would still be liable for the trip fee. Where they are contract prices, agencies may pay negotiated rates for long term services or multiple passenger journeys. As the vehicles become more widespread and their advantages recognised they may displace to a greater or lesser extent the use of SPCs or community transport vehicles. However, at present WAT operators would find it difficult to compete with these alternatives, given that the users are charged less when travelling in community transport or contracted work to SPCs, so are unlikely to replace them fully in the short term. At present 9% of WAT trip fee claims are from TAS members where other agencies are paying all or part of the fare.

Growth in demand from these two sources may add another 20%-40% to demand from current levels, with possibly more in Devonport where WATs have had limited service to date.

7.1.3 Impact of swipe cards

Swipe cards should simplify the operation of WATs, reduce paperwork and improve cash flow for operators. As such most WAT operators support them. It should also greatly reduce the scope for fraudulent redemption of wheelchair-endorsed vouchers, potentially reducing the size of claims for TAS taxi supported wheelchair-dependent transport⁶.

The current system provides a number of opportunities for misuse by voucher holders, standard taxi operators and SPC/WAT operators. Where this misuse is fraudulent, it requires either a degree of collusion between two parties or extreme naivety on the part of the voucher holder. References to this have been frequent enough and the estimate of the scale large enough that the 'returns' of some operators may be significantly affected. This may result in an 'apparent' reduction in WAT usage of the order of 10%, but with greater impacts on some operators than others.

⁶ While the scope will be greatly reduced, it will not be eliminated.

7.1.4 Overall effect on demand

The combined effect of the factors discussed in the previous sections is likely to be a short-term fall in WAT voucher redemptions with the introduction of swipe cards of 5%-15%. This will be followed by a medium term growth in WAT use of 5%-10% for the next 12-24 months (higher in Devonport) and a longer term growth of about 2% -5% per year.

7.2 WAT take up and viability

With the completion of the roll out of the currently allocated WAT licences, there will be roughly a doubling of the total number of wheelchair accessible vehicles available for general services, including the remaining SPCs doing wheelchair work (including that for TAS wheelchair reliant clients). While WATs have largely displaced SPCs from general service nonetheless each city has retained at least one SPC to handle clients preferring or needing hoists. SPCs account for 23% of the total number of these wheelchair accessible vehicles but are providing closer to 10% of the total service delivery.

While demand for wheelchair accessible taxi services has grown strongly in most centres where WATs have been introduced, it has not matched the increase in capacity.

It had always been expected that WAT operators would make part of their return from standard fares including maxi-taxi work. However, the operating cost structure is different for WATs than for standard taxis and varies somewhat with different types of WAT. Generally WATs have a higher capital cost and running cost than standard taxis⁷. However, as operators in Launceston and Hobart do not have the relatively higher fixed cost of a licence, they may have lower overall fixed costs.

Some operators are actively minimising their low-yield tariff 1 and 2 work and maximising the amount of wheelchair or maxi-taxi work that they do. In their view, the returns from standard taxi work are so low with their vehicle, it is better to 'save' the vehicle for the high return work. This strategy also increases their availability for wheelchair-reliant clients, reinforcing the likelihood that they will be preferred as providers. In Hobart, some operators are succeeding with this strategy and keeping their vehicles 'fully' employed. This strategy also particularly suits operators that do not wish to work full time but are looking for a part time income only.

Other operators have already found they cannot get enough wheelchair work to be viable and are actively competing for standard work as well. In general they will make lower returns than a standard cab for tariff 1 and 2 work because of their higher operating costs. Thus they typically seek out tariff 4 maxi-taxi work. This is commonly obtained at airports and evenings in the entertainment areas of town.

If these operators find they are often tied up on a standard fare when a wheelchair call comes through, they may actually further reduce their ability to attract or provide higher yielding

⁷ As the vehicle has a roughly fixed lifetime in terms of distance travelled rather than years, it is most appropriate to regard the capital costs as depreciating at a rate per km akin to a variable cost. The interest payable on the asset value is at a fixed rate per year.

wheelchair work.

Most operators are keeping 100% of the trip fee, saying it is necessary to pay for the higher capital cost of the WAT. Drivers have only a modest incentive to give priorities to wheelchair jobs (a slightly higher tariff), not the much larger additional incentive of the trip fee.

If the operator gives 50% of the trip fee to the driver (as one operator does), drivers have a strong incentive to give wheelchair jobs a priority. However, it pushes down returns to the operator for most vehicles, as the higher tariff does not fully offset the higher operating costs – costs that the operator must bear. However, this may attract and hold better drivers. Returns would still be significantly higher than if the vehicle is carrying a high proportion of tariff 1 or 2 fares.

The focus on wheelchair-reliant clients appears to be the most viable strategy for WATs, but as the fleet expands, it appears unlikely that there will be enough wheelchair demand for all operators to succeed with this strategy.

The likely outcome is a market with three types of operators:

1. Profitable full time operators specialising in wheelchair-reliant clients and topping up with standard taxi fares, primarily maxi-taxi work if required. They may operate relatively expensive vehicles with high running costs but market effectively to TAS taxi members and attract a high proportion of higher margin wheelchair-reliant clients because their vehicles are well suited to these clients' needs and they achieve a high level of client service and satisfaction.
2. Profitable part time operators specialising in wheelchair-reliant clients but working fewer hours. They are viable because they do not have the high fixed cost of a taxi licence.
3. Full time operators operating somewhat lower cost but DDA compliant vehicles that are viable even when carrying clients on Tariff 1 and 2. It appears that some new vehicle models that meet DDA requirements may achieve this, although according to operators, many of the existing ones do not. These may carry relatively small numbers of wheelchair-reliant clients even though they would prefer to carry more when they are available as the trip fee and higher tariff makes them more attractive.

7.3 Vehicle types

Consultation with both operators and user groups show there is a demand for difference types of vehicles and different entry types. While the majority of users prefer to use ramps, a significant number expressed a preference for a lift/hoist. There is evidence that these preferences may change over time. From an operator perspective, there are occupational, health and safety issues with ramps, particularly those that are longer or steeper even though they are DDA compliant. They also expressed concern for larger passengers or passengers in larger wheelchairs, where they considered that a lift/hoist is more appropriate.

Some 'ramps' have a lifting capability. The main concern is keeping them level and stabilising the wheelchair while lifting. Good training is required.

The majority of users apparently prefer rear entry, although side entry WATs are not common and many users may associate side entry with some of the earlier SPCs. One issue raised with side

entry is difficulty in turning the wheelchair inside the WAT after loading. The large clearances required for some wheelchairs make this difficult if not impossible without losing additional seating.

Users expressed preferences for the comfort of some vehicles compared to others. The Commodore stretch cab was favourably mentioned, but is not DDA compliant. At the same time, other users with particularly large or high chairs stated that they could only fit in certain WAT types, even if they are types not preferred by other users. Restricting vehicles to one type of loading, whether ramp or hoist, side or rear potentially has the result of disadvantaging some users unless the specifications allow sufficient flexibility.

Given the need for some wheelchairs to use specific vehicle types, they will often find that there is less choice of vehicle available and that the ability to obtain the right vehicle ASAP or even with a pre-booking will be limited. It will almost certainly mean that they will want call a particular operator or driver rather than take the chance of calling a radio room and getting the wrong kind of vehicle.

The combination of the strategies that are most likely to be viable described in Section 7.2 and the need or preference for different vehicle types by different users, Section 7.3 suggests that some WATs may continue to operate largely for a wheelchair clientele. While this goes against the original intent of the DDA to provide an integrated wheelchair accessible taxi service, it appears to be the outcome that will provide the highest level of service to clients.

A policy of gradually expanding vehicle options will provide a variety of vehicle types that meet a range of wheelchair-reliant clients' needs. Further, only if operators can operate vehicles that give an adequate return in general taxi work while still meeting wheelchair-reliant clients' needs will a truly integrated service develop.

7.4 Driver training

Both operators and advocacy groups raised some issues regarding driver training. For operators in the north, the need to send drivers south puts them at a disadvantage as compared to operators in the south because of the extra travelling time. WAT drivers currently need to attend two courses, the standard taxi driver course and an additional course for WAT drivers, whereas standard taxi drivers only need to attend the standard course.

The scope and quality of the training was also raised by operators and advocacy groups. Some advocacy groups expressed their belief that the scope of the training was not broad enough in that it did not adequately cover the different needs across the disabled community. In addition, they believed strongly that all standard taxi drivers should be trained about dealing with customers with disabilities.

At the time of this consultancy, the process of reviewing driver training had already begun. Combining the two courses may address some of the issues raised.

7.5 Conclusions about adequacy and the effect of releasing more WAT licences

The user survey reveals that while availability and response time has improved in cities where WATs have been introduced, it remains below the level of service available to standard cab users. Service levels should increase as the rest of the allocated licences for 2005 are issued and the vehicles brought into service.

What remains unclear is whether the response time will reach the same level as standard taxis – the benchmark set by the DDA – before any newly released licences are simply not taken up given the current structure of incentives and costs. This will depend on the strategies adopted by operators, strategies that are likely to change as the market develops.

The release of additional WAT licences is unlikely to stimulate substantial additional demand from wheelchair users, nor is there strong expected growth in demand from additional users, as noted in section 7.1.4. If additional licences are issued the relatively higher return wheelchair clientele will be shared among a larger number of vehicles, providing less work from this group per vehicle.

It is likely that well-established operators with a strong reputation will do better than new entrants, placing the burden on new entrants to assess viability from a relatively weaker position. Strong incumbents may well take up new licences as well as new entrants. Existing poor performers are unlikely to take up additional licences and may fail. A significant number of failures is likely to deter new entrants.

An information kit giving details of the TAS taxi wheelchair-reliant membership in each city and surrounding areas and typical trip frequencies would enable better decision-making by potential applicants. This would ensure that applicants were better informed when making decisions about entering the market, meaning they would be better placed for designing successful business strategies, and therefore likely to provide a higher level of service.

Existing WAT operators will not lose any value for their licence as they do not have a perpetual licence with a market value. Operators investing in a WAT that find it is not viable will have the potential to resell the vehicle on the mainland market, albeit likely at a loss.

Additional WATs will add to the competition in the standard taxi industry as at least some operators attempt to gain volume from standard fares. However, as noted earlier, some operators have specifically chosen not to do this or at least to be very selective as their vehicles have relatively higher operating costs. Thus the addition of more WAT licences is likely to put significantly less pressure on the mainstream taxi industry than the release of additional perpetual standard taxi licences, a release that must occur if additional WAT licences are not released in accordance with the *Taxi and Luxury Hire Car Industries Act 1995* in compliance with the National Competition Policy.

If additional standard licences are released, there is a significant risk that the difference between response times for standard taxis and WATs will once again increase.

Appendix A

Myriad Research User Survey Research Report

Appendix B

Myriad Research Advocacy Groups Report

Appendix C

Myriad ACROD Mail-Out Survey Report