RPS

DEMAND FOR TAXI SERVICES IN QUEENSLAND

Technical Research Report prepared for TCQ

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Introduction

- RPS has been engaged by TCQ ("TCQ") to undertake comprehensive research on the Queensland Taxi Industry.
- This Technical Research Report includes research and analysis on the size, rate, characteristics and drivers of demand and need for taxi services in Queensland. This research forms the basis of TCQ's submission to the Opportunities for Personalised Transport Review ("OPT Review").
- This Research Report draws upon extensive information and evidence derived from consultation with industry across the State and representatives of international taxi jurisdictions in the US, UK and Singapore, data provided by Queensland Taxi TBCs ("TBCs"), market research and desktop research.

Drivers of Taxi Need in Queensland

- The demand and need for taxi services in the Queensland community is a function of a range of socio-demographic, spatial, climate, transport choice and economic factors. Changes in any of these drivers can have significant flow on impacts on the drawdown of taxi services by the community.
- Traditional wisdom is that the demand for taxi services is principally determined by the size and rate of growth of the population. Between 2004/05 and 2008/09, the population growth rate in Queensland consistently exceeded 2.0% per year and reached over 2.5% for several years. However, from 2009/10, the population growth rate in the State has slowed, and only exceeded 2.0% in 2011/12.
- The Queensland economy experienced strong and rapid growth during most of the late 1990s and 2000s, with annual growth rates exceeding three percent every year and regularly exceeding 5%. However, the onset of the Global Financial Crisis in 2008/09, coupled with the recent decline in the performance of the mining and resources sector, has resulted in the Queensland economy have returned to a more normalised rate of growth. With the exception of the year to June 2012, annual economic growth rates have not exceeded 3% since 2008/09.
- In addition to population growth, changing demographics can have a significant impact on taxi services. In fact, it is arguable that the growth of older age cohorts is of more relevance to taxi service demand than aggregate population growth, due to the high propensity and reliance of older members of the community on taxis to maintain their mobility and social and economic engagement.
- The demand for taxi services, and other forms of public transport, is influenced by the relative cost of ownership, maintenance and operation of private motor vehicles. Further, the affordability of cars in Australia has been trending downwards for many years in response to a range of factors.

Current Characteristics of Queensland Taxi Need

- Any reform of the Queensland Taxi Industry and associated regulations must be based on a comprehensive understanding of the current state of taxi services in the State and the capacity of the industry to achieve positive and lasting outcomes for the community.
- Taxis are so critical to the Queensland economy and community that, rather than personalised transport, they are in fact a form of decentralised and flexible, point-to-point public transport. This view is shared by the majority of Queenslanders. In their recent survey of the Queensland population, UMR Strategic Research ("UMR") found that 53% of Queenslanders regarded taxis as part of the Queensland's public transport system.
- In the 2015 calendar year, the Queensland Taxi Industry completed over 102 million trips. This is down from 107 million passengers in 2014, potentially reflecting the impact of a combination of wider macro-economic headwinds and the emergence and proliferation of major illegal and non-complying taxi operations in the State.

- Queenslanders also rely on taxi services for their transport to a greater extent than in other States. In particular, demand for taxi services in Queensland is almost double taxi demand in Victoria, despite the latter State having a much larger and more urbanised population. Overall, Queenslanders accounted for more than one in four taxi trips in the country (26.3%), well above the State's share of national population (20.1%).
- The cost of a taxi trip to Queenslanders is broadly comparable with other States, averaging $24.16. This is less than New South Wales ($24.75) but more than Victoria ($23.50). However, when the average longer travel distance of Queensland taxi users is taken into account, Queenslanders get the best value for money from their taxi industry.
- The customer should always be the principal focus of any market-based reform. However, in the case of public transport services, such as Queensland taxis, the needs of the individual customer must be balanced with those of the wider community.
- According to data in 2015/16 Budget, 65% or two in every three Queenslanders were satisfied with the quality of the services they received from the Queensland Taxi Industry.
- This was confirmed by the 2013 Mystery Shopper by a recent survey undertaken by UMR that found a large majority of Queenslanders with satisfied about Queensland taxi services, across a range of specific characteristics. In fact, with the exception of the price of fares, the majority of Queenslanders are satisfied with the current service they receive from the Queensland Taxi Industry.

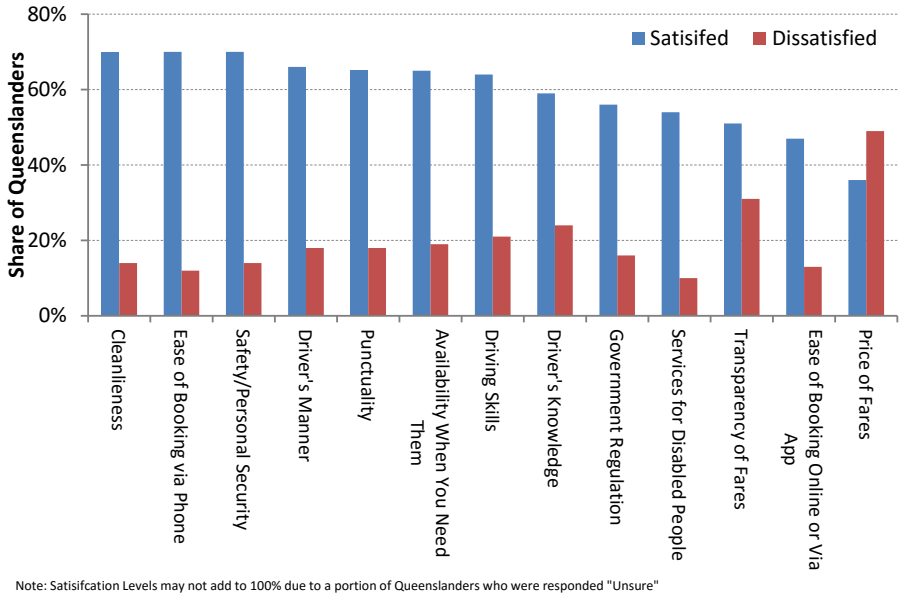


Figure 1 Community Satisfaction in Queensland Taxis, by Service Attribute February 2016

- Interestingly, when customers were asked immediately following their journey, as part of the Queensland Government's Mystery Shopper survey in December 2013, satisifcation was even higher at 88% iof Queenslanders.
- Going forward, opportunities for regulatory reform must first acknowledge the exemplary performance and outstanding achievements of the Queensland Taxi Industry in meeting the needs and exceeding the expectations of both individual customers and the wider community. This establishes the platform from which an innovative and community-focused taxi industry regulatory framework can be established for the next 20 to 50 years.

Who Catches Taxis?

- The sources of demand for taxis is diverse and varied. Taxis service a range of groups within the community. Taxi services extend beyond entertainment and airport-related travel (for which taxis are

mostly commonly associated) to service those whose personal mobility, social engagement and economic contributions are dependent on timely access to taxi services.

- This diversity of demand reflects two types of need for taxi services:
  - » **Discretionary –** where the consumer has a number of potential transport options but chooses to use a taxi.
  - » **Non-Discretionary –** where the consumer has limited choice and must rely upon taxis to meet their transport needs.
- The results of survey research undertaken by UMR on the Queensland Taxi Industry found that 66% of Queenslanders use taxis for business/work, or because they lack access to other transport options and therefore classify themselves as non-discretionary users.
- RPS has modelled the level of demand from individual groups in the community and found that People with Disabilities and in Wheelchairs represent the single largest cohort, ahead of both entertainment and airport-related travel in the State.

Figure 2 Examples of Different Taxi Users, Queensland, 2015

Taxi User	Estimated Trips
People with Disabilities and in Wheelchairs	7.40 million
Tourism and Airport Users	4.76 million
Entertainment-Related Users (Brisbane Only)	4.65 million
Employment-Related Users	3.41 million
Children and Minors	1.04 million
General Business and Community Users	80.8 million

Timing of Demand

- Meeting demand for taxi services requires more than consideration of the type and requirements of different groups in the community, but also the timing of that demand. TBCs in the State have a range of Universal Service Obligations ("USOs") that they are required to fulfil under the Act, Regulation and Service Contracts with Government.
- The demand for taxi services is not consistent. It is highly concentrated in certain times of the day, in certain days of the weeks and even in certain months of the year. This timing is heavily influenced by the diversity of demand for taxi services in Queensland. Different groups require taxis at different times for different reasons. This has the effect of creating volatility in the demand profile of taxi services in the State, which is why the current approach to the central management and distribution of Queensland's taxi fleet has been so successful.
- Data for Queensland provided to TCQ by TBCs reveals a moderate degree of volatility from month to month in taxi trips. February is traditionally the business month for the Queensland Taxi Industry, with business/employment, entertainment travel patterns re-establishing for the year post the Christmas/New Year holidays.
- The months of April, June and September also correspond to above average trip volumes. These months align with school holiday periods suggesting the role of tourist and visitation-related travel in driving higher trip volumes.
- Finally, the month of January also records strong volumes. However, discussion with TBCs and taxi operators suggest that these figures are heavily influenced by large trip volumes associated with New Year's Eve celebrations as well as some tourist and visitation-related travel during the Christmas holidays.
- The need for taxis also changes across the week and even by the hour. During the average week, demand for taxi services grows over the course of the week, before peaking on Friday. Despite this trend,

the weekly demand profile is not as volatile as one might have expected and shows a high degree of structural demand for taxi services, outside of traditional Friday and Saturday night peaks.

- During an average day demand is low until morning work-related travel and then slowly moderates over the course of the day. The exception to this profile is Friday and Saturday nights, when demand accelerates once again in the late evening.

How Do Queenslanders Catch Taxis?

- Queenslanders are unique. We have a "booking" culture in the State, with 65% or two in every three trips in the State pre-booked. This share is high by both national and international standards. In Australia, only the Northern Territory has a similar share of taxi trips booked at 60%.
- Internationally, the share of taxi services booked by customers is very low. Of the Jurisdictions visited by RPS representatives during our study tour, Singapore had the highest share of taxi trips booked with approximately 20%, which is comparable to that of NSW.
- The segmented and demarcated structure of London and New York industries make accurate booking estimates difficult in both cities. In London, the traditional Black Cab market has very low levels of bookings, reflecting their principal role servicing the City of London and the London Airports in the "rank-and-hail" market. This is analogous with the Yellow Cab fleet in New York, which primarily operate on part of the Island of Manhattan providing "rank-and-hail" services.
- To address these spatial and service accessibility shortfalls, both London and New York have secondary taxi industries – minicabs in London and livery or private hire car vehicles in New York – which only accept booked work.
- This contrasts with the structure of the Queensland industry, which is a hybrid "rank-and-hail" and booked jurisdiction. This model is regarded as more effective as it provides a much greater level of flexibility in fleet management and was part of the justification for the establishment of Boro Taxis in New York as a hybrid service.
- In the case of San Francisco, the inefficiency in booked taxi services was partly filled through the creation of Transportation Network Companies ("TNCs") at a State level. These TNCs represent nascent and simplified versions of Queensland TBCs, using less sophisticated technologies and processes than were established by regulation in Queensland in 1994.
- This experience highlights the fact that not only is the level of booked services in Queensland unique, but that this is supported by a hybrid industry structure that maximises the accessibility and availability of taxis for all parts of the community.

Demand for Illegal Taxi Services

- There is much confusion in the community and among policy makers on how to define "ride sharing" in the Queensland context. Commentary from major "ride sharing" providers such as uber and lyft suggest that "ride sharing" is different from taxi services.
- The basis for this differentiation however, does not appear to be the nature of the service offered but instead the way in which the service in secured (by an app-based booking and dispatch platform).
- Consultation undertaken by RPS of international taxi markets in the US, UK and South East Asia found that the taxi industry in almost all locations lack the presence of major centralised booking and dispatch companies like those that have been operating in Queensland for several decades.
- As such "ride sharing" services, like those provided by uber and lyft, represent a differentiated service offering to the traditional taxi industry only in those Australian and overseas jurisdictions where centralised TBCs, with compulsory affiliation requirements, do not exist.
- However, in locations with a strong history of centralised booking – of which Queensland can be rightfully

regarded as global best practice – the emergence of "ride sharing" services provide no practical differentiated offering from the existing taxi industry.

- In fact, the technologies used by "ride sharing" apps are generally of a lower quality and possess a lower capacity than current centralised GIS booking and dispatch software and systems that are at the core of Queensland's taxi industry.
- In the absence of any differentiated booking offering by "ride sharing" companies in the Queensland context and limited to no flexibility, quality and availability differences, "ride sharing" cannot be practically separated from taxi services.
- This view is shared by Queenslanders, with the recent market research undertaken by UMR indicating that 68% of people regard uber as a taxi service, including 67% of people who identify themselves as major uber and "ride sharing" supporters and users.

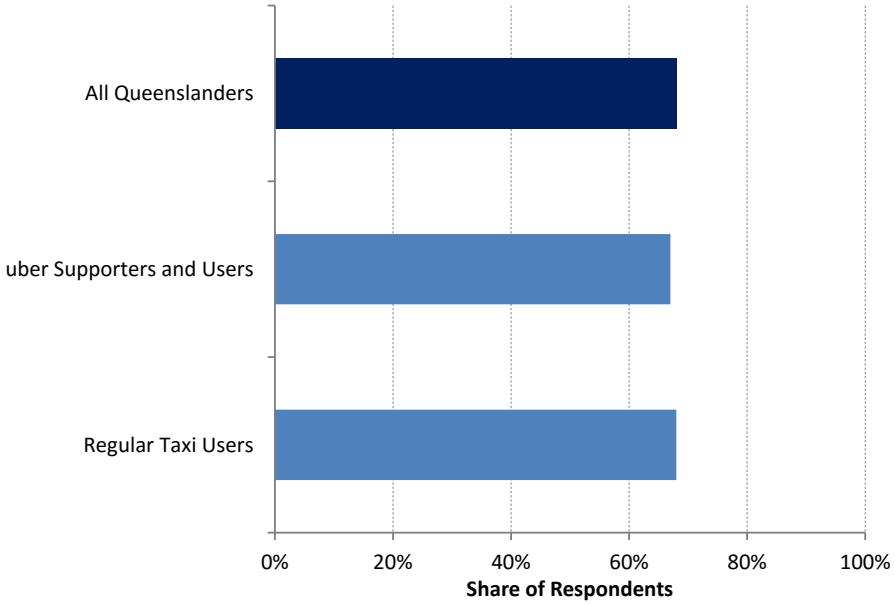


Figure 3 Share of Survey Respondents Who Regard uber as a Taxi Service

- Nevertheless, when compared to taxi trips across the three major Eastern Seaboard States, the demand for informal taxi services currently accounts for only 4.5-6% of all taxi trips.
- In 2015, the total number of taxi trips in Queensland fell by approximately 5 million trips to 102 million. This represents a fall of 4.6% in the year.
- This fall coincided with the introduction of corporately backed informal taxi services in Brisbane and other select South East Queensland locations. However, the entirety of this fall cannot be attributed to "ride sharing".
- Multi-variate regression analysis of taxi trips volumes in Queensland over the past decade by RPS suggests that almost half (48.7%) of the movement in taxi trips in any year can be attributed to changes in the Queensland economy, with a further 28.4% due to higher private passenger vehicle numbers and 14.3% associated with slower population growth.
- The Other Factors category, which includes "Ride sharing" also includes non-ride sharing issues including:
  - » The growth of informal point-to-point passenger services offered by clubs, RSLs and aged care and nursing homes using Commonwealth and State Government-funded community transport services.
  - » The increased growth of illegal taxi services in regional Queensland which predate illegal services in South East Queensland but that have become more overt and extensive over the past 18 months.

  - » Volatile tourism and visitation numbers over the period in response to changing global economic conditions, major global shocks (such as health and medical alerts) and the value of the Australian dollar.
- Overall, RPS estimates that the impact to date of informal illegal taxi operations in South East Queensland has been less than 1% of trips. This is a comparatively low take up of services in Queensland, likely due to limited differentiation of "ride sharing" (beyond price), but also partly reflects the comparatively new nature of corporately-back illegal taxi services in South East Queensland.

Conclusion

- Taxis are one of the most popular, pervasive and universal forms of public transport in the State. Second only to buses in terms of the number of passengers moved, taxis offer a flexible, point-to-point passenger transport services that are available and accessible to all.
- Overall, Queenslanders are very satisfied with their taxi services, rating the Queensland Taxi Industry highly across a range of characteristics and attributes including cleanliness, ease of booking, security, driver manner, knowledge and skills and availability.
- Demand for taxis is diverse including both discretionary and non-discretionary users. Two thirds of Queenslanders identify themselves as non-discretionary users, confirming the high level of reliance of the population on taxi services in the State. Analysis of select cohorts of the community demonstrates the diversity of sources of demand for taxi services, with people with disabilities and in wheelchairs representing the single largest cohesive group, ahead of both entertainment and tourism and airport-related travel.
- Price appears to be the primary motivation for those Queenslanders who use illegal taxi services, with Queensland taxis rating well in terms of punctuality, accessibility and availability. The major reason for this lower cost is the fact that illegal taxis do not comply with the State's stringent regulatory framework for taxi services. Further, the Queensland Taxi Industry does not set fares; these are regulated by the Government to provide certainty and reduce opportunities for exploitation of customers.
- "Ride sharing" offers little new to the Queensland community. The existence of a strong booking culture in the State, coupled a long history of sophisticated computerised central booking and dispatch capabilities means Queensland does not have the same "service gap" of many national and overseas jurisdictions. Instead, "ride sharing" services are similar in most ways to the Queensland Taxi Industry in the State, a fact reflected in the views of Queenslanders that regard uber as simply another type of taxi.
- Instead, "ride sharing" in the Queensland context is merely a form of informal and therefore illegal taxi service. "Ride sharing" is neither new nor an improvement on current services and does not provide a net benefit to the community. It currently services only a small and homogenous segment of the Queensland population and lacks the diversity of demand supported by the Queensland Taxi Industry.
- It is therefore important, when considering the reform of the regulatory framework in Queensland, to prioritise the Queensland community as a whole, rather than the individual consumer. A framework that focuses on individual customers lacks longevity and sustainability and results in the benefits of the taxi industry being concentrated in the hands of a small number of discretionary users to the detriment of more vulnerable non-discretionary user groups.
- Instead, the long-term prosperity of the State and welfare of the population is contingent on a regulatory framework that puts the needs of all members of the community first.

1.0 Introduction

1.1 Research Context

RPS has been engaged by TCQ to undertake comprehensive research on the Queensland Taxi Industry. This research forms the basis of TCQ's submission to the OPT Review.

It also represents the first comprehensive profiling and analysis of the Queensland Taxi Industry in 20 years and will form a key reference source of the characteristics, trends, challenges and opportunities facing the industry over the next several decades.

The research undertaken is comprised of a series of concise, interrelated technical research reports that cover all aspects of the Queensland Taxi Industry. Research topics covered by the reports include:

- **Demand –** analysing the characteristics and drivers of demand for taxi services in Queensland.
- **Supply –** profiling and analysing the supply of taxi services in Queensland, including the current characteristics and structure of the industry, comparisons with the way taxi services are delivered around Australia and overseas and opportunities for improvements in the way taxi supplies are regulated.
- **Pricing –** assessment of the way in which pricing and fares are regulated and set, the appropriateness of these settings based on both industry viability and community affordability concerns, the underlying cost structure of delivering taxi services and complying with regulations.
- **Innovation –** identifying and profiling recent and future innovations in the delivery of taxi services including digital and online dispatch services, in vehicle equipment and technology, business and service delivery models and in the regulations themselves.
- **Economic Analysis –** assessment of the economic contribution of the taxi industry to the Queensland economy including direct and indirect impacts and support provided to industry, the economy and wider community.

These reports include a series of practical recommendations and insights into future development and growth of the industry including business, service, technological and regulatory enhancements that would benefit all stakeholders in the industry and the wider community.

1.2 The OPT Review

In late 2015, the Queensland Government commissioned an independent review of taxi, limousine and ride share services in Queensland. The purpose of the review being:

"…ensure Queenslanders are provided with safe and efficient personalised transport services and with a sustainable industry to deliver the services."

The terms of reference for the Review – referred to the Opportunities for Personalised Transport or OPT Review – are broad in nature and cover all aspects of the personalised transport services sector. The scope includes:

- the safety of the community and drivers
- the delivery of a flexible legislative framework that supports competition and innovation for all participants
- customer opinions of ride share services
- steps undertaken by the taxi industry in adapting to changing customer needs and expectations
- supporting a sustainable industry that is forward-looking and fosters innovation

- competition in the sector including vertical integration, anti-competitive practices and incentives for innovation
- the provision of affordable and customer-focused services
- the needs of the community across Queensland, including those with disabilities or reduced mobility
- the current and potential role of taxis, limousines and ride share services in an integrated transport system, with a focus on the role of these services to foster social inclusion
- transitional arrangements from the current regulatory and service arrangements to the recommended model
- other models and new approaches to delivering personalised transport services both in Australia and overseas
- potential use of personalised transport services by participants of the National Disability Insurance Scheme ("NDIS")
- operational procedures and practices within the sector
- any other related matters

TCQ, supported by RPS, has prepared a submission to the Review.

1.3 Need Technical Research Paper Structure

This report compiles the results of technical research and analysis of the size, characteristics and drivers of demand and need for taxi services in the Queensland economy and community. It includes a number of key sections:

- **Drivers of Taxi Need in Queensland –** a summary of the key megatrends influencing the movement in passenger numbers serviced by the Queensland Taxi Industry.
- **Current Characteristics of Queensland Taxi Need –** analysis of the role of taxis as a major form of public transport in the State, of the level of usage and reliance on taxis and the results of surveys and performance monitoring of the satisfaction of the community.
- **Who Catches Taxi? –** summary of discretionary and non-discretionary sources of demand and detailed technical analysis of the number of trips from key sources of demand in the community.
- **Timing of Demand –** a profile of the monthly, daily and hourly demand for taxi services and the impacts that that cause volatility in demand over a year.
- **How Do Queenslanders Catch Taxis? –** analysis of the unique ways in which Queenslanders secure taxi services and the impact of the time of day on booking patterns.
- **Demand for Illegal Taxi Services –** summary of the results of survey and analysis on the demand for informal and illegal taxis in the State and analysis of the lack of differentiation between "ride sharing" and Queensland taxi services.
- **Conclusions** - summary of key findings from the technical report.

1.4 Sources of Evidence

This Technical Report, and the broader Submission, relies upon an extensive base of both quantitative and qualitative information and evidence. The sources of this evidence can be broken into four broad categories.

1.4.1 Consultation

RPS, in partnership with TCQ, undertook a series of consultation workshops and interviews in Queensland and around the world.

Between December 2015 and February 2016, RPS facilitated workshops with industry stakeholders in the following locations:

- Brisbane Metro North
- Brisbane Metro South
- Ipswich
- Gold Coast
- Sunshine Coast
- Toowoomba
- Hervey Bay/Maryborough
- Gympie
- Cairns
- Townsville
- Mackay
- Rockhampton
- Gladstone
- Mount Isa

These workshops included representatives from the taxi industry – including drivers, licence owners, operators and TBCs.

In March 2016 representatives of RPS, TCQ and the Australian Taxi Industry Association ("ATIA") travelled to a number of overseas taxi jurisdictions to gain an insight into the regulatory, operational and market characteristics of each location. The jurisdictions visited included:

- San Francisco
- New York
- London
- Singapore

In each location RPS met with representatives of local regulators, operators and politicians and gained an understanding of both the unique and shared attributes of the local taxi industry to understand the potential lessons that could be learnt for the Queensland context.

1.4.2 TBC Data and Other Statistics

TCQ facilitated the delivery of a comprehensive set of taxi industry performance and operational data to RPS from a number of major TBCs in the State. These statistics included a full profile of the number, duration, cost, frequency and distribution of taxi jobs and trips, as well as information on the operational costs of delivery taxi services and the level of utilisation of the Taxi Subsidy Scheme ("TSS").

Data sets and other information was also made available to RPS by those overseas taxi jurisdictions with which RPS and TCQ consulted in March 2016. The nature and scope of this information varied depending on the jurisdiction and their capacity to collect, collate and analyse data.

In addition to this information, RPS drew on statistics information from a range of publicly available sources. This included the Australian Bureau of Statistics ("ABS"), Queensland Government Statistics Office ("QGSO"), ATIA and individual reports, surveys and other publicly available data sets from desktop research.

1.4.3 Market Research

TCQ engaged the public opinion and strategic market research firm, UMR, to undertake qualitative and quantitative market research on issues and attitudes affecting the Queensland Taxi Industry.

Research included a combination of facilitated workshops and interviews (via online survey) with representative samples of the Queensland population aged 18+.The surveys were conducted in late February and early March 2016 and covered a range of topics including:

- classification of taxis as public transport and the level of integration of taxis into the Queensland public transport network
- attitudes towards taxis and public understanding of the industry
- service satisfaction levels and key areas of impacting satisfaction both positively and negatively
- frequency of use of taxis
- level of discretionary and non-discretionary usage
- the degree to which taxis provide a benefit to the community
- the role of Government regulation in the taxi industry
- the level of support for passengers with disabilities and the TSS
- level of familiarity with usage of and attitudes towards uber
- socio-economic and demographic characteristics of uber supporters
- classification of “ride sharing” as taxis
- level and type of regulation of “ride sharing” services
- attitudes towards a range of specific potential changes to the regulation of the Queensland Taxi Industry

1.4.4 Desktop Research

RPS has also undertaken desktop research on the issue of taxi industry regulation to complement other sources of information and evidence outlined above. The focus of the desktop research has been on gaining further appreciation of national and international taxi jurisdictions recent and past experiences with regulatory reforms. RPS has also undertaken extensive research on the role of “ride sharing” in overseas markets as well as the economic theory and practice around the causes and regulation of informal economic activity.

Research has been comprehensively cited throughout the Report.

1.5 Author Profile

1.5.1 RPS

RPS is an international consultancy providing world-class local solutions in infrastructure, urban growth, energy, mining and natural resource management.

RPS employs some 5,000 people in the UK, Ireland, the Netherlands, the United States, Canada, Brazil, Africa, the Middle East, Australia and Asia and undertake projects in many other parts of the world. In the Australia and Asia Pacific region our 1,000 professional and technical staff work from offices in 26 locations, including metropolitan and regional centres in high growth areas.

The geographic spread and experience in these strategic locations means our on-the-ground staff have a strong understanding of the local environment and can be mobilised quickly to respond to client's needs. RPS has a reputation for meeting the challenges posed by large, complex projects and for conducting business in an open and responsible manner.

1.5.2 Mark Wallace

Mark Wallace is the Regional Technical Director and head of Economics Advisory Services for RPS in Australia Asia Pacific.

He is one of Australia's leading economics consultants and strategic advisor, providing market research, project evaluation, policy development and reform and detailed economic analysis for a wide range of public and private sector clients across Australia.

His career has included time with the Queensland Government, Brisbane City Council, the employment and training sector and economic consultancies.

Over the past decade as an economic consultant, Mark has developed nationally recognised expertise in a range of areas including:

- innovation policy and implementation
- regulatory reform in major public utilities
- property development economics
- major project evaluation and cost benefit analysis
- health economics
- regional and local economic development

Mark is the principal author of the submission by TCQ to the OPT Review and associated Technical Research Reports.

1.6 Glossary and Abbreviations

ABS	Australian Bureau of Statistics
ATIA	Australian Taxi Industry Association
CARRS-Q	The Centre for Accident Research & Road Safety
CAV	Connected and autonomous vehicles
DSAPT	Disability Standards for Accessible Public Transport 2002
DDA	Discrimination Act 1992 (Cth)
QGSO	Queensland Government Statistical Office
IPNRC	Infrastructure, Planning and Natural Resources Committee
ITS	Intelligent Transport Systems
KMS	Kilometres
MSL	Minimum Service Levels
OPT Review	Opportunities for Personalised Transport Review
SEQ	South East Queensland
TBC	Taxi Booking Company

TCQ	TCQ
TNCs	Transport Network Companies
TMR	Department of Transport and Main Roads
WAT	Wheelchair Accessible Taxi
USO	Universal Service Obligations

2.0 Drivers of Taxi Need in Queensland

The demand and need for taxi services in the Queensland community is a function of a range of socio-demographic, spatial, climate, transport choice and economic factors. Changes in any of these drivers can have significant flow on impacts on the drawdown of taxi services by the community.

This section examines a selection of these drivers including changes in population growth, economic conditions, ageing and disability levels and private motor vehicle ownership rates.

2.1 Population Growth

Traditional wisdom is that the demand for taxi services is principally determined by the size and rate of growth of the population. Between 2004/05 and 2008/09, the population growth rate in Queensland consistently exceeded 2.0% per year and reached over 2.5% for several years. However, from 2009/10, the population growth rate in the State has slowed, and only exceeded 2.0% in 2011/12[1].

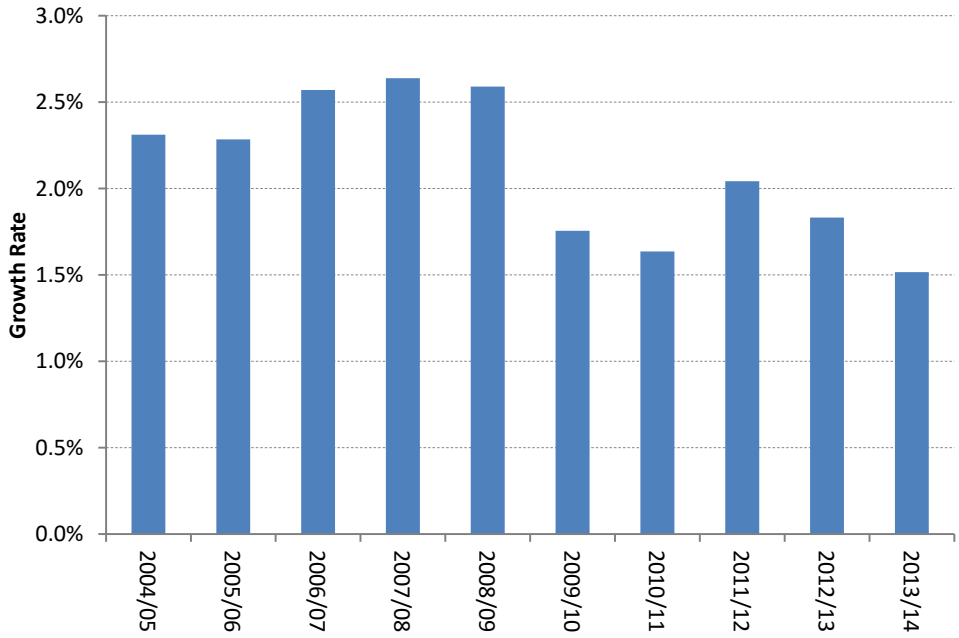


Figure 4 Annual Population Growth Rate, Queensland, 2004/05 to 2014/15

RPS acknowledges that rate of population growth in a region does impact the rate of growth of demand for taxi services. However, population growth is not the only factor, with other factors either accentuating or offsetting population-based demand drivers.

[1] *ABS (2015) Estimated Residential Population Cat No. 3218.0, Australian Bureau of Statistics, Canberra*

2.2 The Queensland Economy

Due to the important contribution to demand made by business, employment and tourism-related taxi travel, the overall state of the economy has had a significant impact on the level and growth of demand for taxi services.

The Queensland economy experienced strong and rapid growth during most of the late 1990s and 2000s, with annual growth rates exceeding three percent every year and regularly exceeding 5%. However, the onset of the Global Financial Crisis in 2008/09, coupled with the recent decline in the performance of the mining and resources sector, has resulted in the Queensland economy have returned to a more normalised rate of growth. With the exception of the year to June 2012, annual economic growth rates have not exceeded 3% since 2008/09.[2].

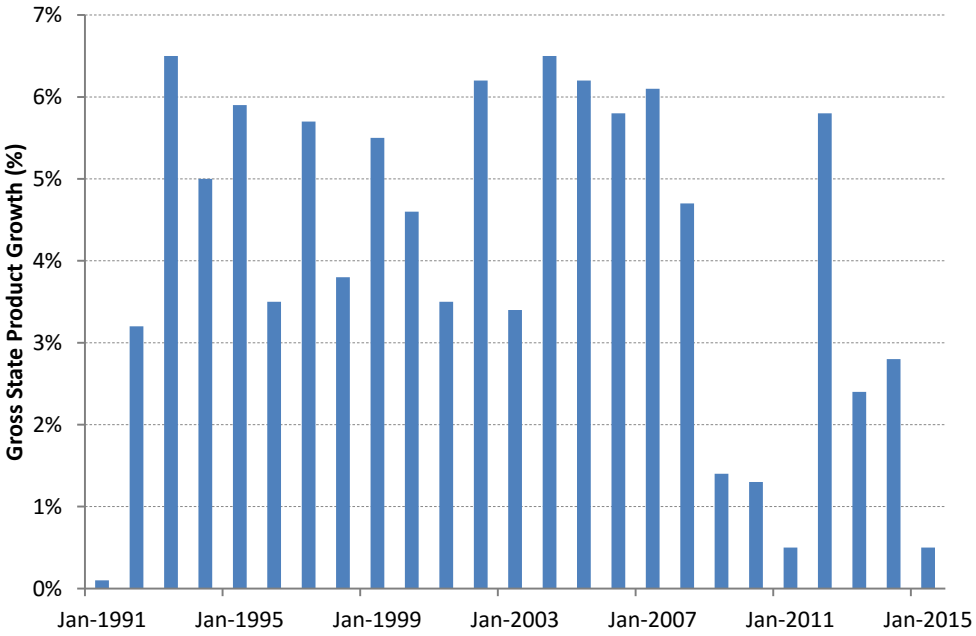


Figure 5 Annual Change in Gross State Product, Queensland, 1991 to 2015

The slowing of the Queensland economy invariably impacts the demand and need for taxi services from the community. Businesses, employment and tourism-related travel is all reduced during periods of lower economic activity.

2.3 Population Ageing and People with Disabilities

In addition to population growth, changing demographics can have a significant impact on taxi services. In fact, it is arguable that the growth of older age cohorts is of more relevance to taxi service need than aggregate population growth, due to the high propensity and reliance of older members of the community on taxis to maintain their mobility and social and economic engagement.

In addition to general mobility issues, people in older age groups are more likely to have profound and severe core limitations or disabilities. According to the ABS, 5.5% of people had a profound or severe core

[2] *ABS (2015) National Accounts – State Accounts 2014/15, Cat Not 5220.0 Australian Bureau of Statistics, Canberra*

limitation in 2012[3]. This varies by age group, and is most prominent in age cohorts above 70 years. As the population ages, this group will grow to account for 7.0% of the population by 2036 (496,000 people) and 8.5% by 2061 (852,000 people)[4].

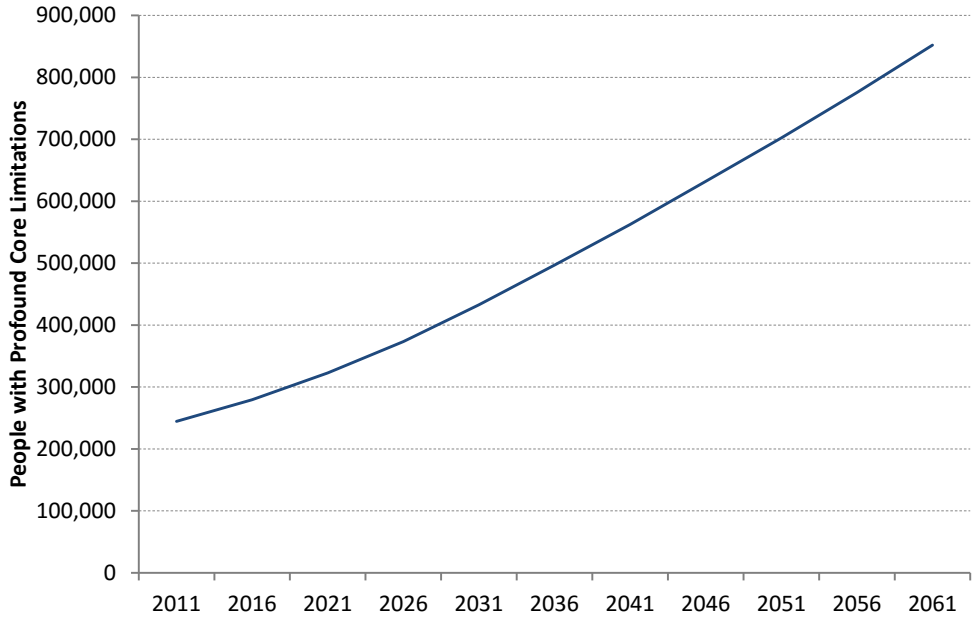


Figure 6 Projected Number of People with Profound Core Limitations, Queensland, 2011 to 2061

This demographic trend will likely drive considerable long-term demand for taxi services and result in the share of total trips associated with TSS-related customers increasing.

2.4 Motor Vehicle Ownership Rates

The demand for taxi services, and other forms of public transport, is influenced by the relative cost of ownership, maintenance and operation of private motor vehicles. The affordability of cars in Australia has been trending downwards for many years, in response to a range of factors including:

- the relative strength of the Australian Dollar relative to other currencies
- the relative strength of the Australian economy relative to other countries
- removal of trade barriers and tariffs through both bilateral and multilateral trade agreements

The effect has been that private motor vehicle prices are broadly the same now as they were 35 years ago (nominally), despite the impacts of inflation. Modern private motor vehicles also possess a range of technologies and safety measures that have been added at effectively no additional cost to consumers. This has also made the purchasing of a motor vehicle in Australia highly attractive to compared to many other countries.

[3] *ABS (2014) Disability, Ageing and Carers, Australia: Queensland, Cat Not 4430.0, Australian Bureau of Statistics Canberra*
[4] *This analysis is based on Queensland Government (2013) Projected Population, by Age and Sex, Queensland, Queensland Government Statistical Office, Brisbane*

Figure 7 Purchase Cost of Select Vehicles, Australia and Select Countries, 2014 AUD[5]

Country	Ford Focus	Mazda3	Toyota Corolla
Australia	$24,590	$22,490	$22,240
UK	$32,029	$33,562	$34,470
USA	$22,804	$24,925	$21,539

The effect of higher affordability has been a higher take up of private motor vehicles by the Queensland community. Over the past 10 years, the number of vehicles registered per 1,000 Queenslanders has increased by almost 4%[6]. This means that vehicle ownership is growing at a faster rate than the population.

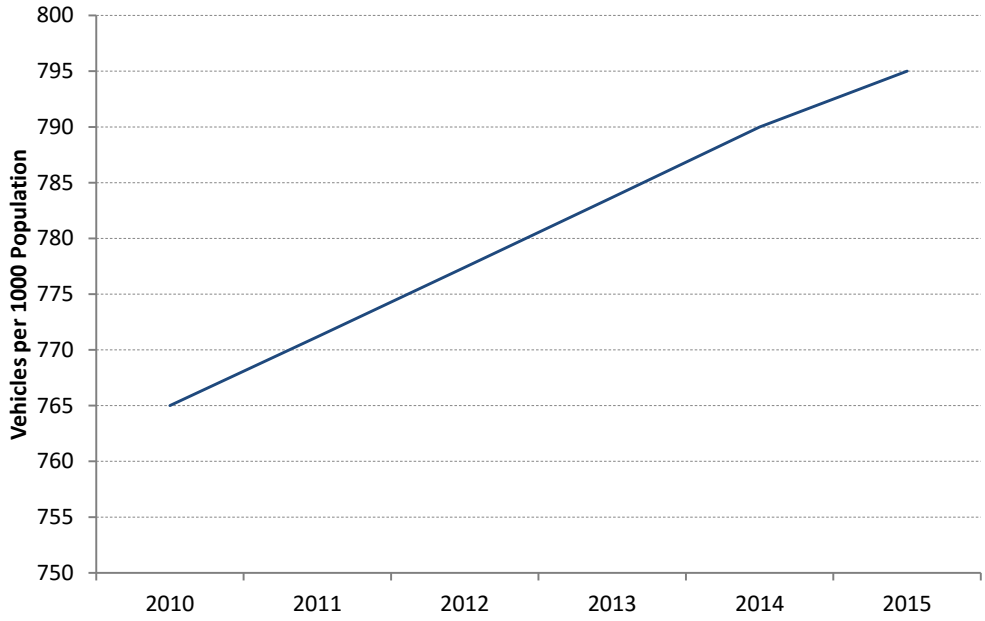


Figure 8 Vehicle Registration per 1,000 Residents, Queensland, 2010-2015

These related trends of affordability and ownership rates mean that there is less requirement for many groups in the community to use taxis on a regular basis. This either reduces the need for taxi services generally or limits their usage to particular circumstances (such as when they are consuming alcohol or where other factors such as parking or traffic congestion making using a private motor vehicle difficult).

2.5 Summary of Findings

The impact of these macro-economic trends has been the slowing and in some years decrease in demand for taxi services in Queensland. It is into this climate that illegal and non-complying taxi services have entered. This has undoubtedly exacerbated the impact on the regulated and legal taxi industry in Queensland. This is causing significant financial costs to taxi drivers, licence owners, operators and TBCs and calling into question the sustainability of both universal service delivery and the continued delivery of taxi-based public transport services at no cost to Government.

[5] *Newscorp (2014), Data access on 24 February 2016 at http://www.news.com.au/finance/money/budgeting/car-affordability-hits-new-high-prices-at-new-lows/news-story/5fd194098463c07ce890317914a0717e*
[6] *ABS (2016) Census of Motor Vehicles, Cat No 9309.0, Australian Bureau of Statistics, Canberra*

3.0 Current Characteristics of Queensland Taxi Need

Any reform of the Queensland Taxi Industry and associated regulations must be based on a comprehensive understanding of the current state of taxi services in the State and the capacity of the industry to achieve positive and lasting outcomes for the community. In particular, focus must be afforded to understanding:

- the size of need for taxi services
- the level of reliance on taxi services
- how and when services are being required by the community
- the level of satisfaction of the community of the Queensland Taxi Industry

This section profiles the current characteristics of demand for taxi services from Queenslanders in order to provide an evidence-base for consideration of potential regulatory reforms.

3.1 Popular Form of Public Transport

Taxis are an essential form of public transport. They are critical for enabling and facilitating economic activity, ensuring social engagement and participation of people with disabilities and, in regional communities, often represent the only form of non-private motor vehicle transport available.

Taxis are so critical to the Queensland economy and community that, rather than personalised transport, they are in fact a form of decentralised and flexible, point-to-point public transport. This view is shared by the majority of Queenslanders. In their recent survey of the Queensland population, UMR found that 53% of Queenslanders regarded taxis as part of the State's public transport system[7].

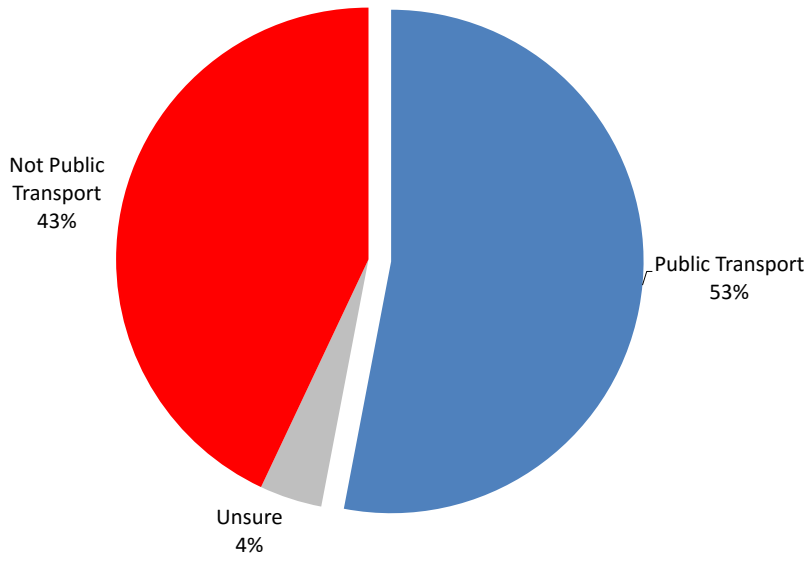


Figure 9 Share of Queenslander's Who Consider Taxis to be Public Transport, February 2016

[7] *UMR (2016), TCQ - Issues affecting the taxi industry, UMR Strategic Research, Sydney*

This view of the majority of Queenslanders is understandable when the characteristics of taxis are compared with that of other more traditional forms of public transport. In fact, with the exception of route-based travel and large Government funding contracts and subsidies, ***taxis share all the characteristics of other public transport services in Queensland.***

Figure 10 Attributes of Public Transport

Attributes	Trains	Buses	Ferries	Light Rail	Taxis
Regulated and Transparent Fares	✓	✓	✓	✓	✓
Centralised Fleet Management	✓	✓	✓	✓	✓
Government Regulation	✓	✓	✓	✓	✓
Route-Based Travel	✓	✓	✓	✓	✗
Area-Based Service Contracts	✓	✓	✓	✓	✓
Government Subsidies for Disadvantages Commuters	✓	✓	✓	✓	✓
Government Funded and Subsidised	✓	✓	✓	✓	✗
Universal Accessibility	✓	✓	✓	✓	✓
MSLs	✓	✓	✓	✓	✓
Shared Usage	✓	✓	✓	✓	✓

3.2 Level of Taxi Usage and Demand

In the calendar year of 2015, the Queensland Taxi Industry completed over 102 million trips[8]. This is down from 107 million passengers in 2014, potentially reflecting the impact of a combination wider macro-economic headwinds and the emergence and proliferation of major illegal and non-complying taxi operations in the State.

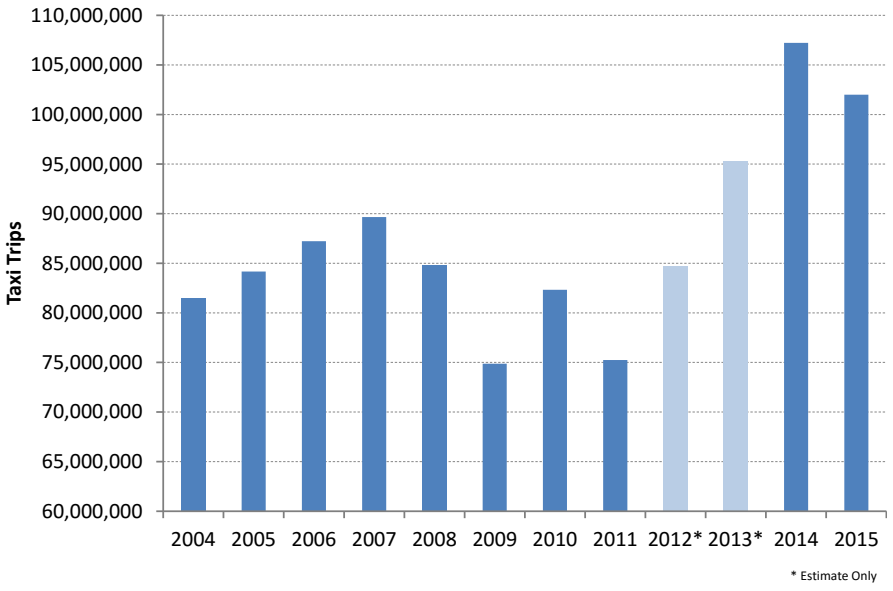


Figure 11 Taxi Trips, Queensland, 2006 to 2015[9]

[8] *TCQ (2016) Unpublished data, TCQ, Stones Corner*
[9] *ATIA (2015) Taxi Industry Statistics, 2014 accessed at* http://www.atia.org.au/taxi-statistics *and TCQ (2016) Unpublished data, TCQ,*

Despite this, taxi services remain a critical form of public transport in Queensland. To place its role in context, RPS estimates that in 2015 taxis were second only to buses in terms of patronage in Queensland. Government contracted bus services across the State exceeded 125 million passengers, though patronage has been falling[10] in recent years in response to high fare costs.

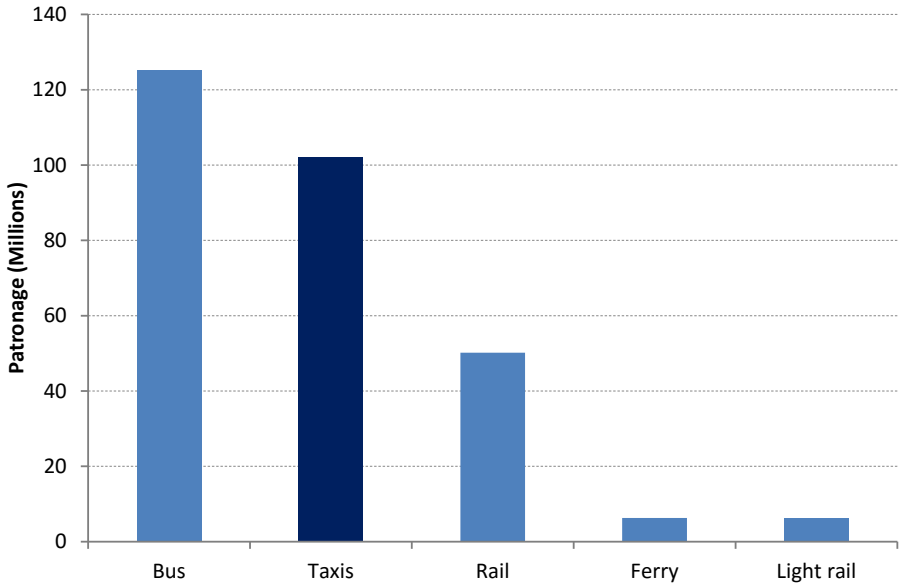


Figure 12 Passengers, by Public Transport Mode, 2015

This performance is exemplary, when the average bus and rail passenger in Queensland is subsidised by the Government at a rate of $7.10 per trip. In contrast, taxi passengers receive no subsidy (with the exception of TSS recipients)[11].

3.3 Reliance on Taxi Services

Queenslanders also rely on taxi services for their transport to a greater extent than in other States. Data from the ATIA indicates that Queenslanders use taxi services more than any other State, except New South Wales. In particular, demand for taxi services in Queensland are almost double taxi demand in Victoria, despite the latter State having a much larger and more urban population.

Stones Corner

[10] Estimates derived from QGSO data sets on Translink patronage, Translink Tracker Reports from the Department of Transport and Main Roads, Queensland Government Budget 2015/16 and Queensland Rail Annual Report 2013/14.

[11] QTT (2015) Budget 2015 Department of Transport and Main Roads Service Delivery Statement, accessed at http://www.budget.qld.gov.au/budget-papers/documents/bp5-tmr-2015-16.pdf

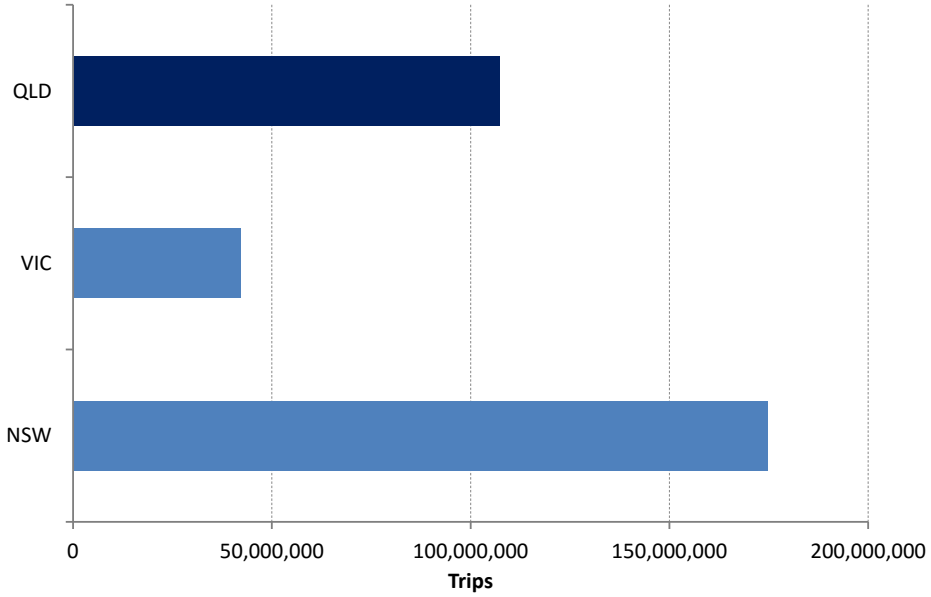


Figure 13 Taxi Trips, by State, 2014[12]

This equates to the average Queenslander catching a taxi 22.6 times per year. This is three times higher than Victorians (7.1) and broadly in line with NSW averages (23.1). Overall, Queenslanders accounted for more than one in four taxi trips in the country (26.3%), well above the State's share of national population[13].

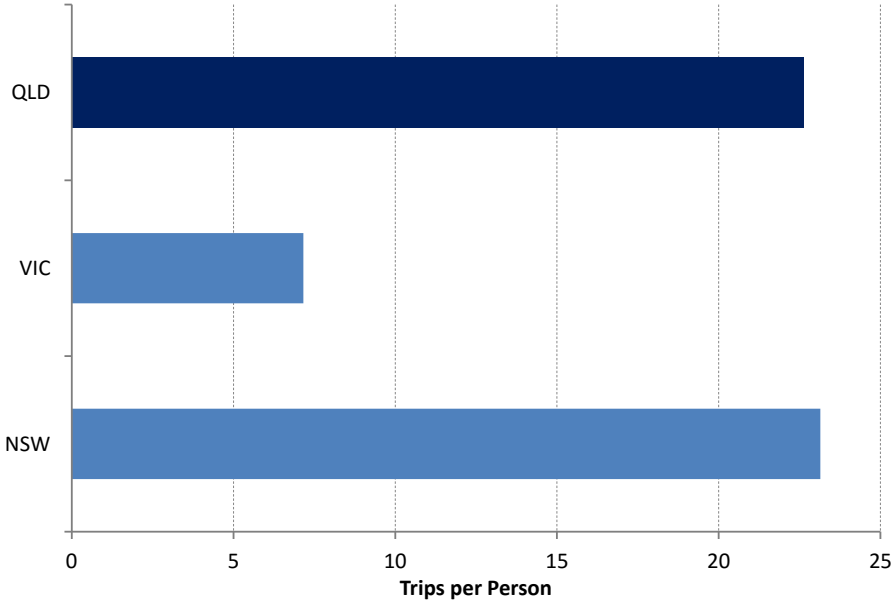


Figure 14 Taxi Trips per Person, by State, 2014[14]

[12] *ATIA (2015) Taxi Industry Statistics, 2014 accessed at http://www.atia.org.au/taxi-statistics*
[13] *Population estimates from ABS (2015) Estimated Residential Population, Cat No 3218.0, Australian Bureau of Statistics, Canberra*
[14] *ATIA (2015) Taxi Industry Statistics, 2014 accessed at http://www.atia.org.au/taxi-statistics*

Queenslanders also use taxis differently to other States. The number of passengers per taxi job[15] in Queensland is significantly higher than other States, averaging 2.2 per job. In contrast, NSW had an average of 1.8 passengers per taxi job while Victoria had an average of only 1.2[16].

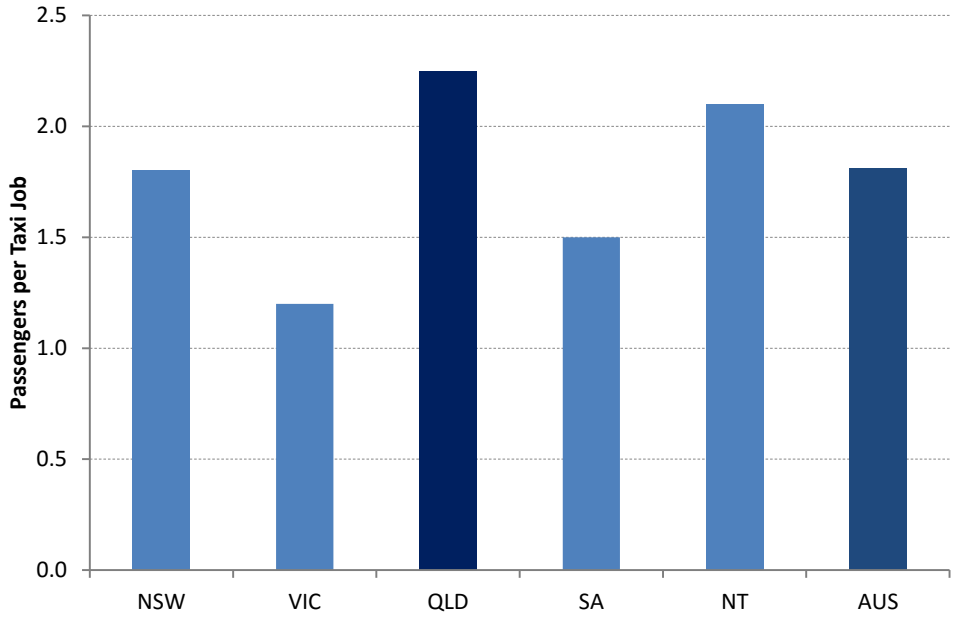


Figure 15 Taxi Occupancy Rate, Average Number of Passengers per Metered Job, 2014/15

3.4 Distance, Time and Cost

Queenslander's also travel further in taxis on average than other States. In 2014, the average travel distance per taxi job in metropolitan Queensland was 11.5 kms, longer than Metro Victoria (9.7 kms) and Metro New South Wales (7.0kms)[17].

[15] *The number of taxi jobs is on measured by the number of taxi meter activations*
[16] *ATIA (2015) Taxi Industry Statistics, 2014 accessed at http://www.atia.org.au/taxi-statistics*
[17] *ATIA (2015) Taxi Industry Statistics, 2014 accessed at http://www.atia.org.au/taxi-statistics*

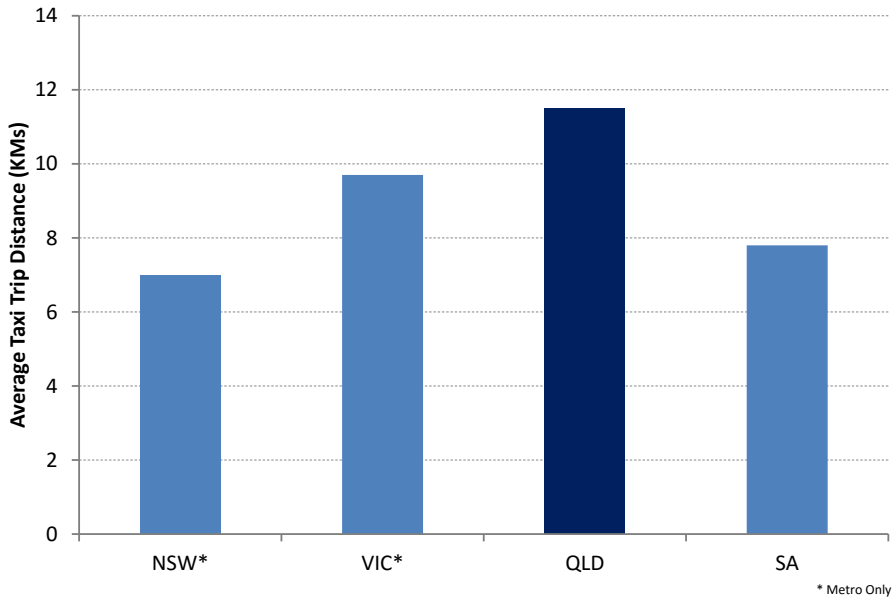


Figure 16 Average Distance Travel per Metered Taxi Jobs, Queensland and Select States, 2014

Despite the added travel distance, the cost of a taxi trip to Queenslanders is broadly comparable with other States, averaging $24.16. This is less than New South Wales ($24.75) but more than Victoria ($23.50). However, when the average travel distance is taken into consideration, Queenslanders get the best value for money from their taxi industry.

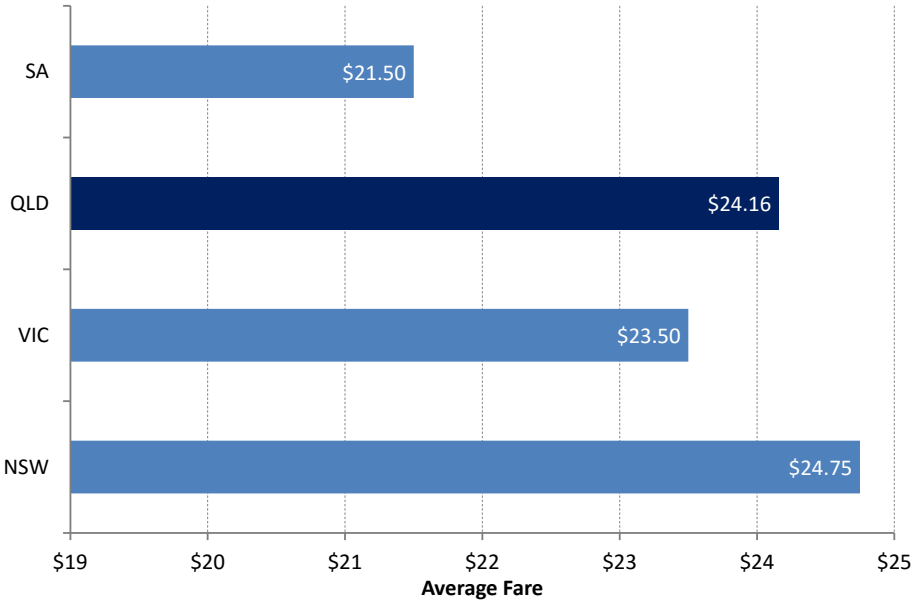


Figure 17 Average Fare, Queensland and Select States, 2014

The average cost per km travelled in 2014 in Queensland taxi trips was $0.93, lower than NSW ($1.96), Victoria ($2.02) and South Australia ($1.84). This reflects the fact that on shorter trips, flag fall represents a larger proportion of the fare.

Therefore, taxi services that provide customers with transport options for longer trips are more cost effective and provider greater value to the community.

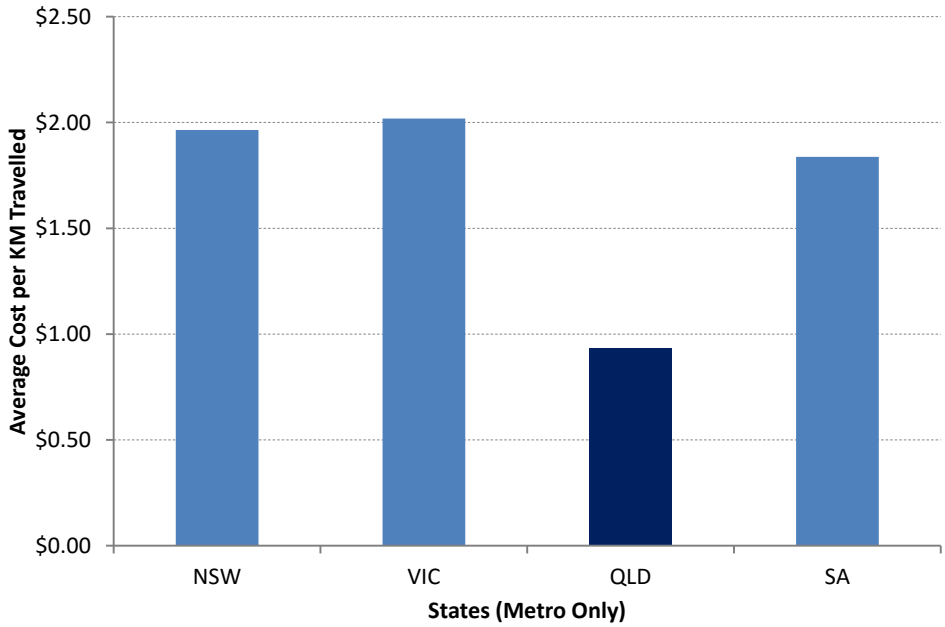


Figure 18 Average Cost per passenger per KM Travelled, 2014[18]

3.5 Community Satisfaction

The customer should always be the principal focus of any market-based reform. In the case of public transport services, such as Queensland taxis, the needs of the individual customer must be balanced with those of the wider community. This is important, as a major failure of market and competition based economic theory is that elevating the individual can often undermine the long-term sustainability of services to the community, resulting in the loss of service quality, accessibility and reliable o the individual and society in the long-term.

Community satisfaction in the services provided by the Queensland Taxi Industry has been the subject of surveys for a number of years. Satisfaction levels are captured in the Service Delivery Statements of the Department of Transport and Main Roads ("TMR") as part of the Queensland Budget each year[19]. According to data in 2015/16 Budget, 65% or two in every three Queenslanders were satisfied with the quality of the services they received from the Queensland Taxi Industry. This is less than the target level of 69%, however, this reflects the impact of two major issues – transparency of fare information and the affordability of fares.

This was confirmed by a recent survey undertake by UMR[20] which found that a large majority of Queenslanders were satisfied about Queensland taxi services, across a range of specific characteristics. In fact, with the exception of the price of fares, the majority of Queenslanders are satisfied with the current service they receive from the Queensland Taxi Industry.

[18] *Estimates derived by RPS from ATIA (2015) Taxi Industry Statistics, 2014, ATIA, Sydney*
[19] *QTT (2015) Queensland Budget 2015/16, Service Delivery Statement, Department of Transport and Main Roads accessed at http://www.budget.qld.gov.au/budget-papers/documents/bp5-tmr-2015-16.pdf*
[20] *UMR (2016), TCQ - Issues affecting the taxi industry, UMR Strategic Research, Sydney*

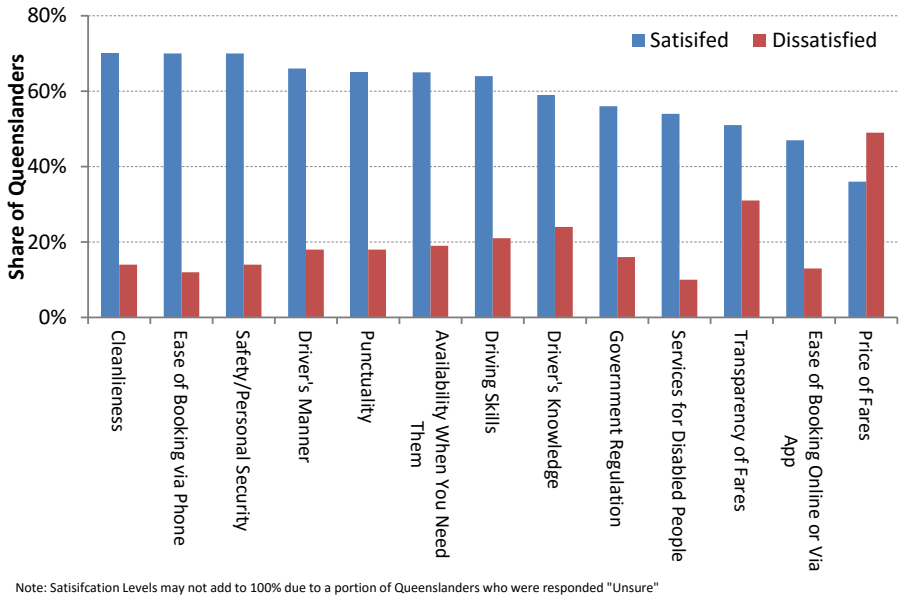


Figure 19 Community Satisfaction in Queensland Taxis, by Service Attribute February 2016

Interestingly, the survey revealed two key issues:

- Highest levels of dissatisfaction among Queenslanders are in those attributes primarily determined by Government regulation. The structure and level of fares for example are mandated by TMR. Not only do these attributes have high levels of dissatisfaction, they also have high shares of Queenslanders who are "Unsure" indicating a lack of understanding and awareness of fare information.
- The share of Queenslanders who are "Unsure" about the availability of Online and App-based Booking Systems of TBCs is very high and is the principal cause of a lower total Satisfaction level for that attribute. This suggests greater communication and promotion of these booking capabilities is required. Despite this poor awareness, current estimates are that booking apps from Queensland TBCs have been downloaded on iOS and Android phones over 750,000 times since their release.[21]

RPS believes that, in anything, the results of both UMR and TMR Service Delivery State, potentially understate actual satisfaction levels. The Mystery Shopper Survey, conducted for the Queensland Government in December 2013, found overall satisifcation level among the Queenslanders who were surveyed upon completion of their taxi trip was as high as 88% or almost nine in every ten[22].

Overall, the level of satisfaction by Queenslanders in their taxi service is high. But more importantly, the level of dissatisfaction is extraordinarily low, only exceeding 20% in four of the service attributes analysed by UMR. It is from this perspective that regulatory reform must be viewed in order to build upon the strong performance of the Queensland Taxi Industry in servicing the community for the past two decades.

[21] *TCQ (2016) Unpublished Data, TCQ, Stones Corner*
[22] *Roy Morgan (2014) Taxi Mystery Shopper Survey December 2013 accessed at http://www.tcq.org.au/uploads/3/0/6/0/30604245/2013_taxi_mystery_shopper_survey_results.pdf*

3.6 Summary of Findings

Taxis form a major part of the Queensland public transport network, second only to buses in terms of patronage. They move Queenslanders over 100 million times per year and, unlike all other forms of public transport in the State, do so without broad subsidies from the Queensland taxpayer.

Queenslanders use and rely upon taxis more than in any other State. We travel more often, in larger groups and for longer distances than anywhere else in Australia and receive a higher quality service at a lower cost than in other States. This circumstance has been the basis for high levels of satisfaction by Queenslanders in our taxi services, with the major points of contention being around fares, which are solely determined by Government.

Going forward, opportunities for regulatory reform must first acknowledge the exemplary performance and outstanding achievements of the Queensland Taxi Industry in meeting the needs of both individual customers and the wider community. Reform must also acknowledge the unique characteristics and drivers of the Queensland community in their engagement and use of taxi services. Recognising both of these factors will help established the platform from which an innovative and community-focused taxi industry regulatory framework can be delivered for the next 20 to 50 years.

4.0 Who Catches Taxis?

The sources of demand for taxis is diverse and varied. Taxis service a range of groups within the community extending beyond entertainment and airport-related travel (for which taxis are mostly commonly associated) to service those whose personal mobility, social engagement and economic contributions are dependent on timely access to taxi services.

This section profiles and analyses the sources of demand and need for taxi services in Queensland. It includes a broad classification of the levels of reliance and dependence on taxis by different user groups, analyses the usage profile by the community and analyses the level of demand from specific groups.

4.1 Discretionary and Non-Discretionary Users

Taxis service a diverse range of groups of the community, ranging from occasional taxi users to those whose personal mobility, social engagement and economic contributions are dependent on timely access to taxi services.

This diversity of demand reflects two types of need for taxi services:

- ***Discretionary– where the consumer has a number of potential transport options but chooses to use a taxi.***
- ***Non-Discretionary– where the consumer has limited choice and must rely upon taxis to meet their transport needs.***

The motivations for catching a taxi in each of these categories varies. ***Discretionary*** users have a choice and choose taxi for a range of reasons. These may include:

- convenience
- point to point travel – the trip can be undertaken with only one mode
- cost – particularly when considering the whole of life cost of motor vehicle ownership
- productivity – being able to undertake other tasks while travelling
- weather or climate – due to heavy rain or high temperatures
- security

For ***non-discretionary*** users, catching a taxi is their only option. This limited choice can be due to a range of factors:

- time of day – other transport options are not available
- health or medical conditions – making private and non-taxi public transport options unviable
- vehicle requirements – for example, wheelchair accessible taxis
- age – either older or younger members of the community
- lack of availability of alternatives – such as the lack of comprehensive public transport networks in many regional and rural communities

The existence of both of these categories of demand makes regulating taxi services complex. It also makes the classification of taxis as public transport as appropriate. The existence of groups within the community who choose taxis over other viable transport options does not undermine the classification of taxis in Queensland as public transport. There is a component of discretionary demand in all forms of public

transport, where the consumer chooses public transport because of its value proposition, for lifestyle or social reasons or other motivations.

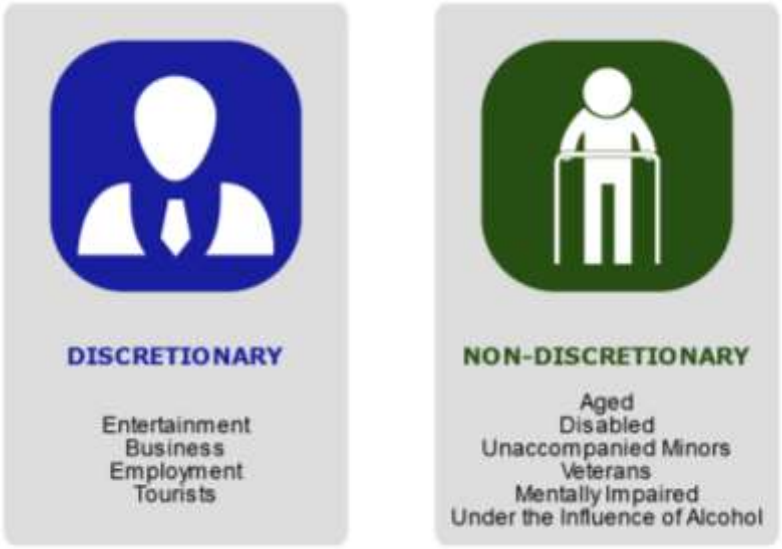


Figure 20 Main Categories of Demand for Taxis in Queensland

This also undermines the assertion that taxis operate in a market environment as claimed by other commentators. The existence of a large share of non-discretionary demand means that choice – a fundamental feature of any market – is not universal. The results of survey research undertaken by UMR on the Queensland Taxi Industry found that 66% of Queenslanders use taxis for business/work or because they lack access to other transport options and therefore classify themselves as non-discretionary users[23].

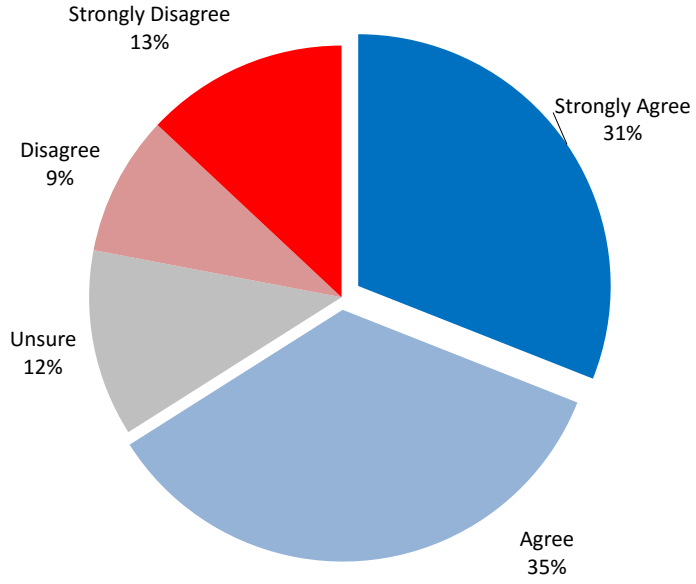


Figure 21 Share of Queenslanders Who Use Taxis for Work or Where They Have No Other Option, February 2016

[23] *UMR (2016), TCQ - Issues affecting the taxi industry, UMR Strategic Research, Sydney*

Therefore, regulating taxi services as though it is a private commercial market – focused on maximising competition and individual consumer power and utility – can have negative and perverse impacts on those who depend most on the service and those who are already the most at-risk and most in need of support.

This reality has been borne out in other jurisdictions, where market-based regulatory framework has left those with disabilities, minors and lower income households with limited access to quality taxi services, requiring the Government to either reimpose regulation[24] or directly procure services[25].

Instead, like other forms of public transport in Queensland, discretionary demand cross-subsidises demand from non-discretionary users, allowing for universally accessible services (in terms of vehicle and service quality, time availability and geographic distribution). But unlike other forms of public transport, this outcome is achieved for consumers with no direct funding support or broad subsidy from the State Government.

4.2 Profile of Taxi Usage

While the average Queenslander makes a taxi trip 22 times a year, this is not representative of the entire population. Recent research by UMR revealed that almost one third of Queenslanders are ***Non-Users*** – using taxis less than once a year. In contrast, more than half are classified as ***Occasional Users*** – using taxies a few times a year. Only 14% of Queenslanders are regarded as ***Regular Users*** – catching taxis monthly or more.

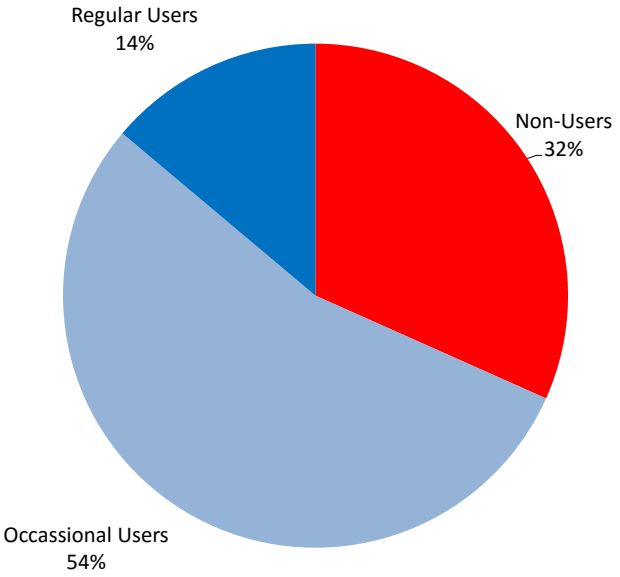


Figure 22 Frequency of Use of Taxis in Queensland, February 2016[26]

4.3 Diverse Demand

This concentration in the need for taxis is further complicated by the diversity of characteristics of "Regular Users". These users draw on taxi services for both Discretionary and Non-Discretionary travel and come from a wide range of groups within the community. Much of this demand is occasional or based on specific

[24] *As was the case in Ireland in 2008 and 2011.*
[25] *50% of taxi services in Sweden are procured by the Government on behalf of the population.*
[26] *UMR (2016), TCQ - Issues affecting the taxi industry, UMR Strategic Research, Sydney*

circumstances (such as attending a major sporting or community event or travelling to and from hospital). There is also a large component of demand that is directly linked to travel for business or commercial purposes.

However, beyond these broader social and economic categories, there are a range of specific groups who rely and depend on taxis to meet their transport needs. RPS has selected a series of these groups and analysed their demand for taxi services in Queensland. These groups are illustrated below:

Figure 23 Sources of Demand for Taxi Services

4.4 Entertainment-Related Travel

4.4.1 Drivers of Need

The most common association that members of the public and the media make with the need for taxi services is the traditional “peak times” of Friday and Saturday nights. This is due to these times being traditionally the most popular with younger age groups to attending clubs and bars in entertainment precincts, particularly in Brisbane and on the Gold Coast.

Taxi services have historically been popular with passengers on Friday and Saturday nights for a number of reasons. Firstly, given that most entertainment venues serve alcohol, members of the public don’t have the option of driving their own vehicle. This means that passengers must generally rely on non-personal motor vehicle transport options.

Secondly, the availability of public transport late at night is particularly poor. In Queensland, there are very few public transport services that operate after 12:00 am and those that do are infrequent[27]. Further, because of the route-based nature of public transport, the passenger is often left with the need to get home from the closest station or stop, which can be both challenging and dangerous for passengers who may be intoxicated. All of these factors support the classification of entertainment-based travel using taxi services as non-discretionary.

As such, the demand for taxi services on Friday and Saturday nights, particularly in key entertainment precincts around the State is higher than average. This can create perceptions among the community, echoed by the media and commentators of a lack of available and accessible taxis during these times. However, this perception is not necessarily supported by the evidence. Data collated by TCQ on passenger movements at secure taxi ranks in Fortitude Valley and the Brisbane CBD indicates that average wait time for a taxi by passengers at ranks was only 90 seconds[28]. A major driver of this outstanding performance has been the improved information flows to TBCs and across the fleet provided by rank supervisors.

Instead, the perception appears to be borne out from higher than average wait times for booked taxis during this period. The strong history and culture of booking cabs in Queensland (refer to section 5.0) means that passengers continue to book a taxi during Friday and Saturday peak times, when catching a taxi at a rank is actually a more time effective solution. The concentration of demand during these “peak periods” in key entertainment precincts means that a rank-based supply model is likely to be more appropriate.

Therefore, effort should focus on promoting and encouraging a behavioural shift away from booking a taxi during these peak times towards the use of ranks. This will help to improve the timeliness of access by passengers to taxi services and enhance overall fleet efficiency and productivity. This would need to be supported by improved rank infrastructure, optimally including the establishment of secure ranks outside of all major entertainment establishments in key precincts across Queensland.

4.4.2 Role of Taxis

RPS has been provided access to performance data for Queensland taxis by a select number of TBCs. This includes the average takings of taxis in Queensland by shift during the week. A review of this data for Brisbane-based taxis during the Friday and Saturday PM shifts – the times most associated with late night entertainment-related travel – indicates that each taxi secures up to 31 trips per night (based on 2.2 passengers per taxi job) over these two shifts. Applying this to the Brisbane fleet that is active during those shifts (76% of the total fleet), this equates to ***over 4.65 million trips in Brisbane*** that can be associated with evening entertainment activities.

Friday and Saturday nights account for 7-8% of total taxi trips in Brisbane per year. This illustrates the fact that entertainment-related travel to major entertainment precincts represents only one segment of demand for taxi services in the community and the folly of basing regulatory reform on this segment of demand alone.

Nevertheless, the concentration of taxi need during Fridays and Saturday nights across many centres in Queensland means these shifts are a critical and reliable source of revenue for Queensland taxis. The additional revenue earnt during these shifts allows the industry to cross-subsidise the delivery of services at

[27] *Based on a review of train, bus and ferry timetables for Translink services after 12am in Brisbane, Gold Coast and Sunshine Coast Local Government Areas*
[28] *TCQ (2016), Unpublished data, Taxi, Passengers and Wait Times, Secure Ranks July 2013 to December 2015, TCQ, Stones Corner.*

other low volume times (such as Sunday, Monday and Tuesday AM Shifts) and provide equitable access to taxi services even in local areas lacking a critical mass of demand (in line with geographic distribution and accessibility regulations).

Figure 24 Variation of Shift Income from the Weekly Shift Average, Brisbane Taxis, 2015

Day	AM	PM
Sunday	28.7%	115.4%
Monday	81.5%	104.1%
Tuesday	88.7%	95.3%
Wednesday	111.8%	100.5%
Thursday	111.5%	114.8%
Friday	104.1%	151.6%
Saturday	49.1%	142.9%
Average	**100%**	

4.5 People with Disabilities and in Wheelchairs

4.5.1 Drivers of Need

Taxi services are of critical importance to the mobility and therefore engagement and participation in society and the economy – of people with disabilities.

All forms of public transport in Australia are required to comply with the *Disability Standards for Accessible Public Transport 2002* ("DSAPT")**.** Formulated by the Attorney-General under subsection 31 (1) of the *Disability Discrimination Act 1992 (Cth)* ("DDA"), the DSAPT seek to provide a level of certainty to operators and providers of public transport services and infrastructure about their responsibilities under the DDA. The DSAPT also identify a series of target dates for compliance extending over a 30-year timeframe[29].

The Queensland Taxi Industry is currently the one of the only transport sectors in the State that fully complies with the DSAPT. This is reflected in the high share of WATs (incorporating hydraulic lift and hoists, rather than ramps as in most jurisdictions) as well as the training of drivers in ways to properly support disabled passengers.

4.5.2 Role of Taxis

The Queensland Government currently funds the TSS. This scheme does not subsidise the operations of the taxi industry but instead provides an allowance of up to 50% of the cost of a taxi fare (up to $25) for people with disabilities.

In order to qualify for the TSS, a person must be a Queensland resident and meet one of the following criteria:

- *physical disability requiring dependence on a wheelchair for all mobility outside the home*
- *severe ambulatory problem that cannot functionally be improved and restricts walking to an extremely limited distance*

[29] *Department of Infrastructure and Regional Development (2016) Transport for People with Disability accessed at https://infrastructure.gov.au/transport/disabilities/index.aspx*

- *total loss of vision or severe visual impairment (both eyes)*
- *severe and uncontrollable epilepsy with seizures involving loss of consciousness*
- *intellectual impairment or dementia resulting in the need to be accompanied by another person at all times for travel on public transport*
- *severe emotional and/or behaviour disorders with a level of disorganisation resulting in the need to be accompanied by another person at all times for travel on public transport*[30]

These criteria demonstrate that "disability", as referred to under the TSS, is broader than people in wheelchairs. While those in wheelchairs are often the most visible in terms of their mobility constraints and challenges, taxi services are recognised as critical for people with a wide range of movement, vision, memory and behavioural conditions.

This is an important distinction as servicing these groups requires more than equipment or technological solutions alone. While Wheelchair Accessible Taxies ("WATs") are important for those with physical disabilities, impacting their mobility outside the home, servicing people with other types of disabilities often requires skilled and experienced drivers trained in appropriate techniques for assisting and securing passengers.

Similarly, consultation with the industry revealed that there are passengers with non-wheelchair mobility disabilities (particularly those associated with ageing), who struggle to enter and exit from WATs. This inappropriate vehicle match to the needs of the passenger can result in falls and injury.

It is therefore critical the regulations understand the complexity and diversity of needs of people with disabilities and ensure the current and future taxi fleet is optimised to meet the specific requirements of this cohort.

RPS was provided data from TBCs in Queensland on the number of TSS-related trips in 2015. The data provided included the number of TSS trips in the 2015 calendar as well as the total metered trips by taxis affiliated with those TBCs.

Based on this data, RPS estimates that approximately 7.3% of total trips by Queenslanders are TSS-related. This is a substantial share of total taxi trips over the course of a year. This is higher than the share of Queenslanders with Profound and Severe Core Limitations for 5.5%[31].

[30] *Queensland Government (2016) Subsidies and Concessions Information access on 28 February 2016 at https://www.qld.gov.au/disability/out-and-about/taxi-subsidy/*
[31] *ABS (2014) Disability, Ageing and Carers, Australia: Queensland, Cat Not 4430.0, Australian Bureau of Statistics Canberra*

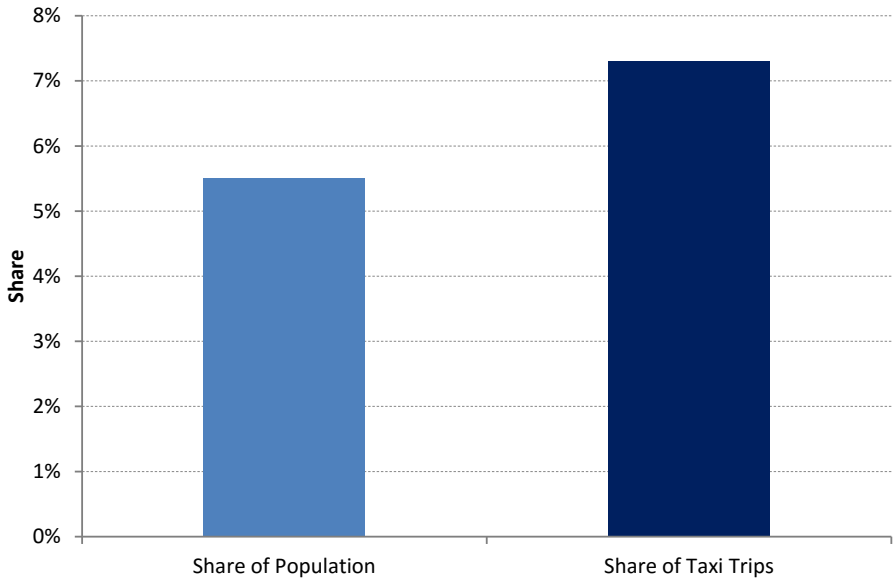


Figure 25 Disabled Queenslanders, Share of Taxi Trips and Population

Applying this share, TSS-related trips accounted for a total of 7.4 million trips in 2015 across Queensland. This is the single largest individual segment of demand analysed for taxi trips in Queensland analysed by RPS.

4.6 Tourists and Travellers

4.6.1 Drivers of Need

Tourism is a core driver of the Queensland economy. In 2013/14, tourism contributed over $22.5 billion or 7.6% to the Queensland Gross Regional Product and almost 10% to State employment[32]. Tourism plays a particularly important role in the Queensland economy with the State accounting for one in four visitors, higher than Queensland's share of the national population.

[32] *Deloitte Access (2015), Queensland Regional Tourism Satellite Accounts 2013-14 Tourism Research Australia accessed at http://cdn.queensland.com/~/media/2F85A62DE4794D3AB5F6AADDE13C323A.ashx?la=en-AU&vs=1&d=20150817T092926*

Tourist visitation is expected to continue to grow strongly over the next 5-10 years. According to Tourism Research Australia, interstate and international visitor nights in Queensland will reach over 185,000,000 by 2024/25 with over half in Regional Queensland[33].

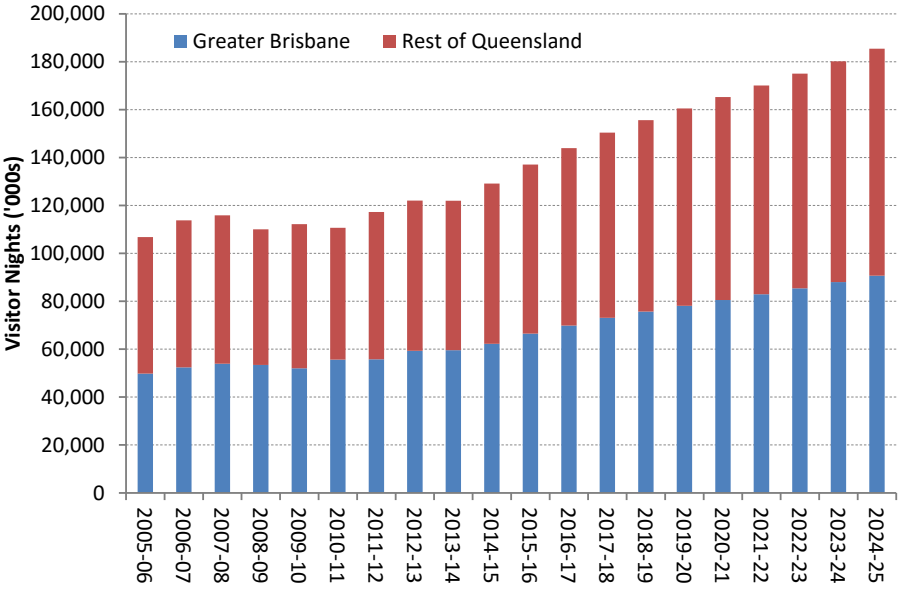


Figure 26 Tourist Visitor Nights, by Part of Queensland to 2024/25

Similarly, outbound and interstate travel by Australians has been particularly strong in recent years. The relative strength of the Australian Dollar for much of the past decade and the comparative robustness and resilience of the Australian economy, has meant that Australians have remained one of the most mobile countries in the world.

These factors have contributed significantly to the growth of airport patronage in recent years. Data from Bureau of Infrastructure, Tourism and Regional Economics, major airports in Queensland had a passenger throughput of over 38 million in 2014/15. This is up from 18.2 million in 2000/01 and 29.8 million in 2006/07[34].

[33] *Tourism Research Australia (2015) State and Territory Forecasts 2015, accessed at http://www.tra.gov.au/research/State-and-Territory-Tourism-Forecasts-2015.html*
[34] *BITRE (2016) Airport Traffic Data, accessed at http://bitre.gov.au/publications/ongoing/airport_traffic_data.aspx*

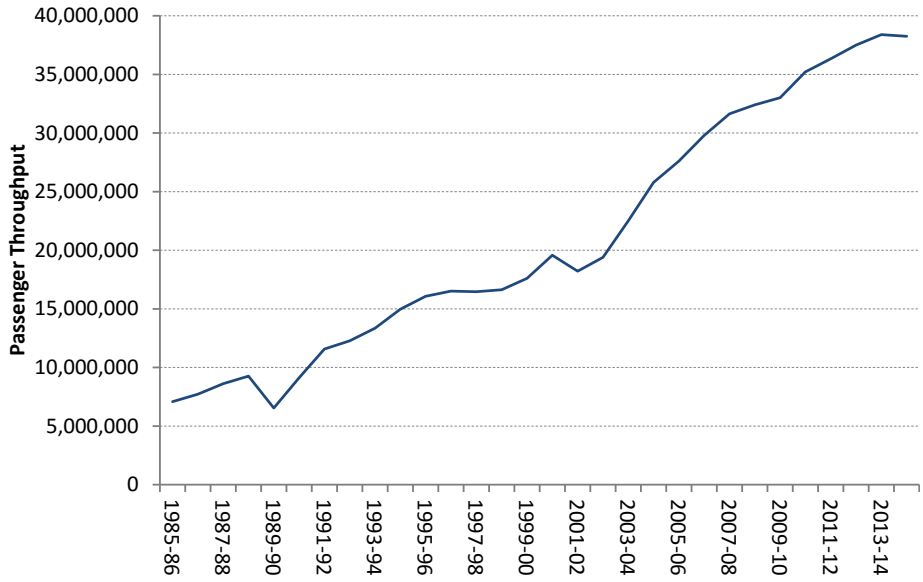


Figure 27 Airport Passenger Throughput, Major Queensland Airports to 2014/15

This is driving demand for taxi services to move passengers to and from Queensland airports.

4.6.2 Role of Taxis

Taxis play an important role in the movement of airline passengers to and from airport precincts. According to a study commissioned by the Tourism and Transport Forum entitled "Accessing our Airports", taxis feature prominently in the land transport options of major Queensland airports. Taxi shares of land passenger movements at a selection of major Queensland Airports is outlined in below.

Airport	Passengers	Taxi Share
Brisbane	21,918,357	8.5%
Cairns	4,391,014	26.0%
Gold Coast	5,867,294	17.0%
Other	6,074,990	12.4%
Total	38251655	12.4%

Figure 28 Taxi Share of Land Transport of Passengers, Queensland's Major Airports[35]

Based on the application of these shares, and an assumed 12.4% share for other airports in Queensland (based on a weighted average of the three major airports), RPS estimates that airport passengers generate approximately 4.76 million trips a year or 4.7% of the total number of taxi trips in the State in 2015.

[35] *TTF (2014) Accessing our Airports, accessed at http://www.ttf.org.au/Content/airportaccess0211.aspx*

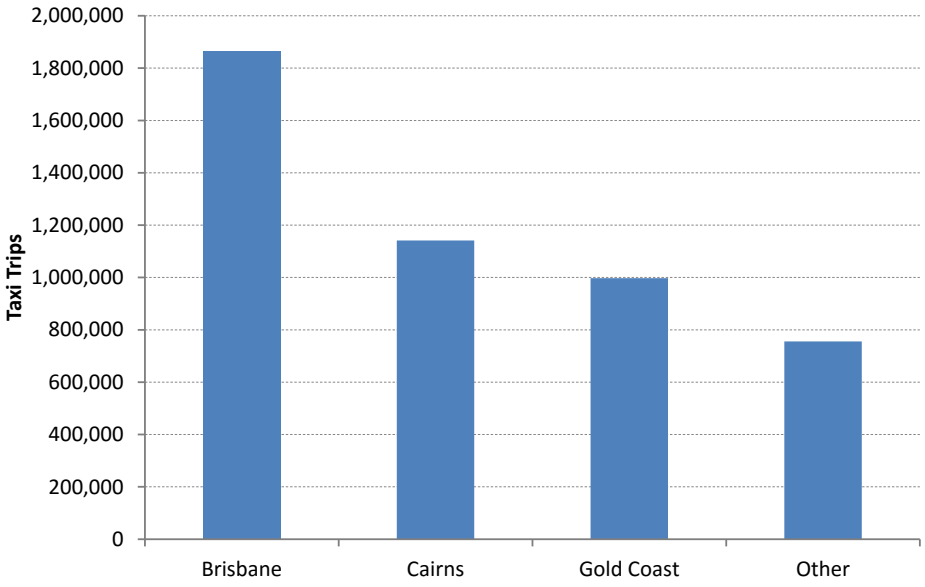


Figure 29 Taxi Trips, To and From Queensland Airports

4.7 Employment-Related Travel

4.7.1 Drivers of Need

In addition to supporting tourism activity in the State, taxi services are often relied upon by people as their primary mode of transport to work. Accessibility to employment opportunities is critical to ensuring the prosperity and welfare of individuals and households in the State and ensuring that businesses can readily source skilled workers.

Queensland's unemployment rate has been structurally high (i.e. above 6 per cent) for much of the past two (2) years. This reflected the deterioration in the underlying economic performance of key sectors of the Queensland economy – namely mining. Nevertheless, the unemployment rate trended downwards for much of 2015, and despite a spike in joblessness in January 2016, this trend has continued into the early part of 2016[36].

[36] *ABS (2016) Labour Force Australia Detailed, Cat No 6291.0.55.001, Australian Bureau of Statistics, Canberra*

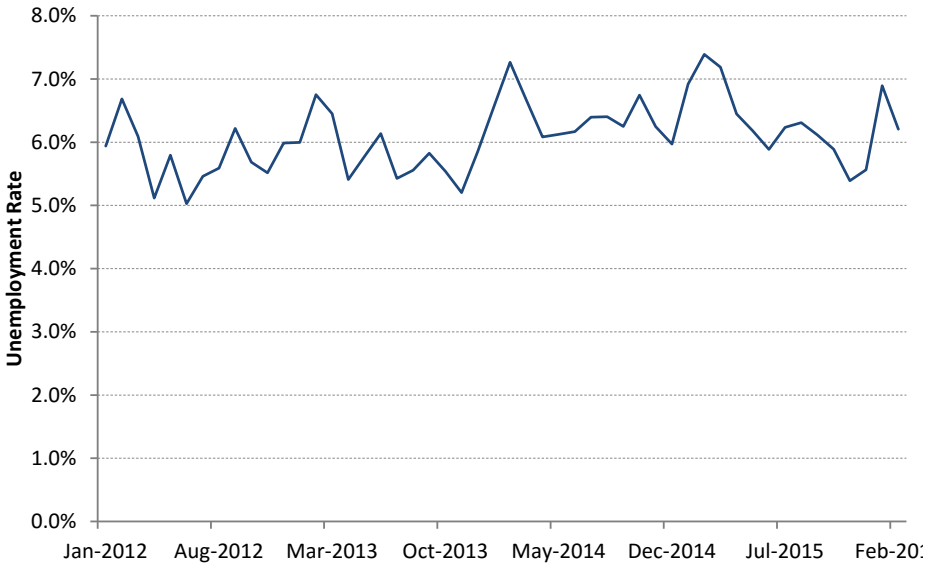


Figure 30 Unemployment Rate, Queensland, February 2016

This improvement in underlying employment conditions however hides a more worrying trend. The share of people working only part-time hours continues to rise in Queensland. The part-time share of workers in Queensland has now been consistently above 30% or three in every ten jobs since August 2015 – the longest run in Queensland history. If this trend continues, the improvement in unemployment rates will not prevent a structural decline in the quality of living and financial sustainability of Queensland households in the long-term.

Therefore, it is essential for the Government to continue to ensure that all Queenslanders can readily access high income, high skilled full-time employment opportunities as they arise. This includes maximising the choice of travel modes available to workers – such as taxis – particularly in regional areas most impacted by the recent slowing of the Queensland economy.

4.7.2 Role of Taxis

According to the 2011 Census of Population and Housing by the ABS, 0.3% of Queenslanders aged 15 and over who were employed used a taxi as their primary mode of transport[37]. As at January 2016, this equates to approximately 7,100 workers who rely on taxis to get them to work, to earn a living and support their families.

[37] *ABS (2012) Census of Population and Housing 2011, Australian Bureau of Statistics, Canberra*

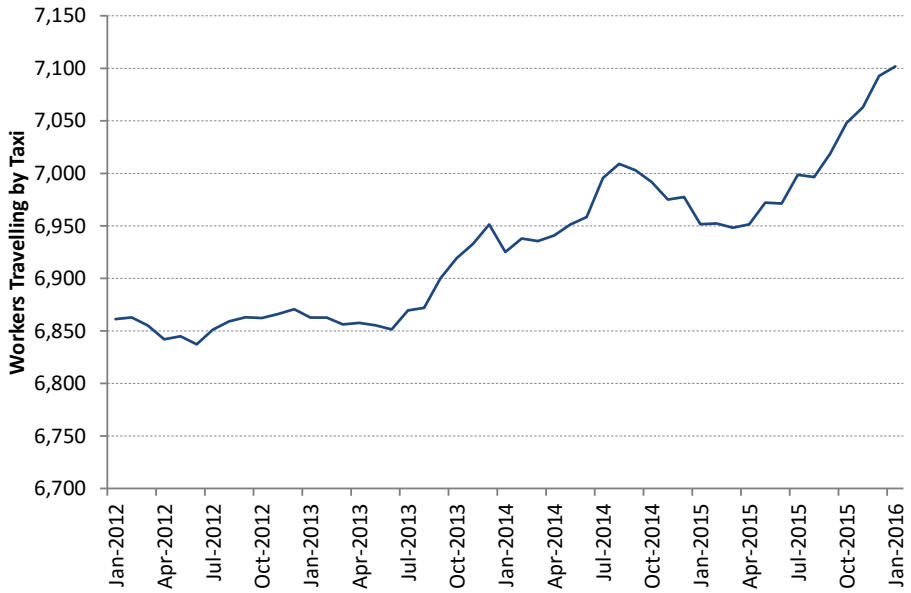


Figure 31 Estimate of Workers Who Travel to Work by Taxi, Queensland, 2012 to 2016

This level has increased sharply in recent months and has been climbing for much of the time since mid-2013. Based on a 48-week working year and two trips per workday (to and from the place of employment), these workers generate need for ***3.41 million taxi trips.***

4.8 Children and Minors

4.8.1 Drivers of Need

In certain circumstances, parents use taxis to transport their children to school and other activities. The secure and regulated nature of taxi services, with supporting GPS tracking and monitoring, in vehicle cameras and ongoing communication by the TBC to the taxi – means the parents can rely upon Queensland taxis to safely transport their children.

The most common travel destination for children is school. Attendance at primary and secondary school is not only compulsory in Queensland, it also represents a fundamental component of the development of young people into productive and engaged contributors to the Queensland community and economy. A combination of worsening congestion and two working parent households meaning getting children to school is increasingly challenging.

In 2015, there are currently 319,487 primary school students (Prep to Year 6) in Queensland State Schools[38]. This is up from 271,339 students in 2011 – growth of 48,148 students or 17.7% over the four years. This is twice as fast as the growth of the wider population, highlighting the impact of higher fertility rates during the mid-2000s and general population growth.

[38] *Department of Education and Training (2015) Full-Time Enrolments – February 2015, Reports and Statistics, Queensland Government, Brisbane*

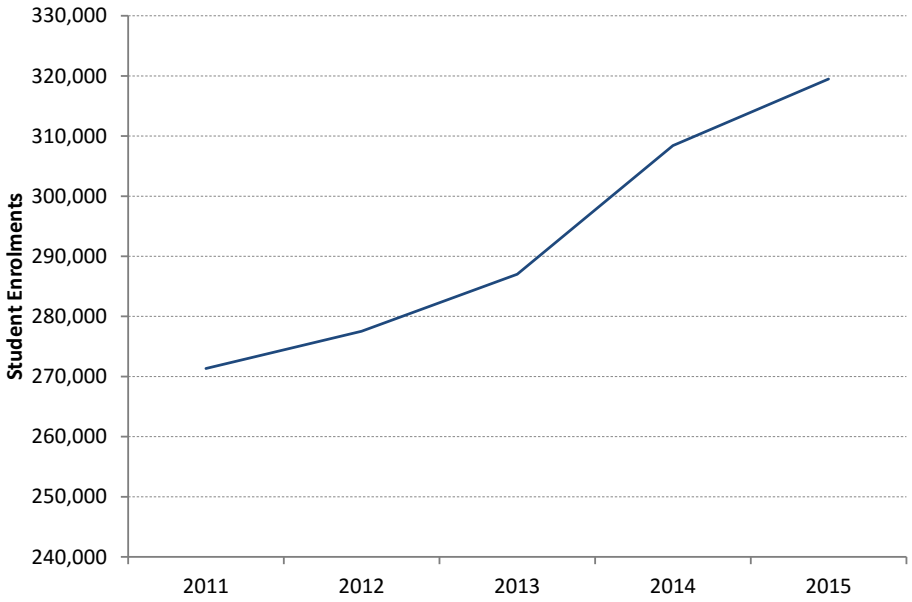


Figure 32 Primary School Students, State Schools, Queensland, 2011 to 2015

This growth in school student numbers in recent years is placing further pressure on transport networks and on families. Maximising the choice of households to transport their children to school in a safe and timely manner is therefore an essential consideration of the Queensland Government integrated transport policy generally and the regulatory framework of the Queensland Taxi Industry specifically.

4.8.2 Role of Taxis

A study in 2005 of the mode of travel of primary school student in Brisbane across four schools found that private motor vehicles represented the 0.8% of students travel to and from school by taxi[39]. This level varied between schools, with taxis being a more common form of transport in some locations than others. Applying the taxi travel rate, it is estimated that 2,595 students caught taxis to school in 2015. This is up from 2,200 in 2011.

[39] *Ridgewell, C, Sipe, N and Buchanan, N (2005) School Travel Modes in Brisbane, Urban Research Program Research Paper 4, Griffith University, Brisbane*

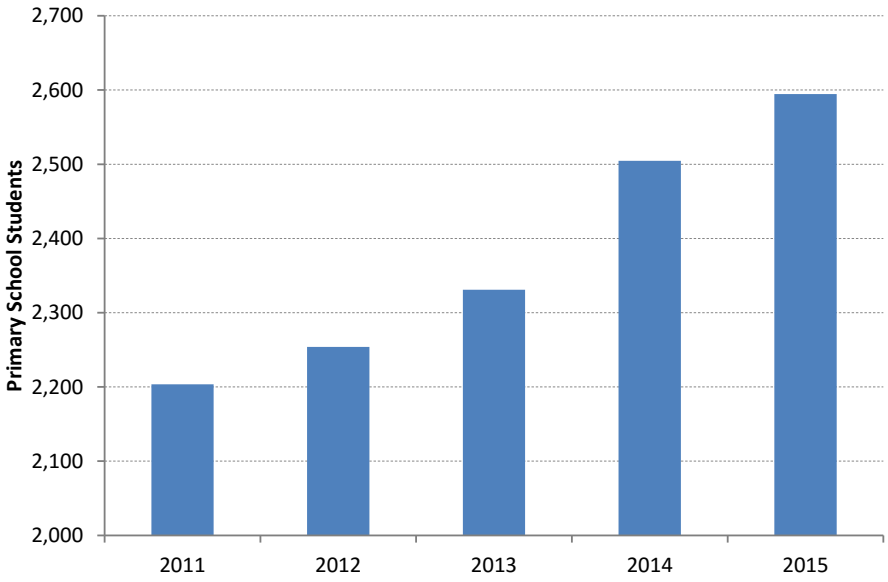


Figure 33 Primary School Students Travelling by Taxi, Queensland, 2011-2015

Based on 200 school days (40 weeks) and two trips per day, RPS estimates that primary school students accounted for over 1.04 million taxi trips in 2015. Without access to taxis, the ability of over 2,500 primary school students to attend the education essential for their development and future success would be seriously impeded and compromised.

4.9 Summary of Findings

The demand for taxi services in Queensland is diverse. Taxi need is linked to all sectors of the economy through employment-related travel and by supporting the efficient and effective operation of entertainment and tourism precincts across the State. Taxis also provide critical transport services to both older age groups, people with mobility issues and disabilities and for children and minors.

Figure 34 Examples of Different Taxi Users, Queensland, 2015

Taxi User	Estimated Trips
People with Disabilities and in Wheelchairs	7.40 million
Tourism and Airport Users	4.76 million
Entertainment-Related Users (Brisbane Only)	4.65 million
Employment-Related Users	3.41 million
Children and Minors	1.04 million
General Business and Community Users	80.8 million

It is therefore critical that the regulatory framework governing the Queensland Taxi Industry continues to ensure that all Queenslanders have timely, consistent and reliable access to taxis 24 hours a day, 365 days per year. Maintaining this accessibility requires a sustainable and viable taxi industry that can rely upon servicing higher volume cohorts to help to cross-subsidise the delivery of services other groups in the community.

5.0 Timing of Demand

Meeting demand for taxi services requires more than consideration of the type and requirements of different groups in the community, but also the timing of that demand. TBCs in the State have a range of USOs that they are required to fulfil under the Act, Regulation and Service Contracts with Government. Namely, TBCs must provide, through Operators and Drivers, a 24 hour, 7 day a week taxi service that meets and exceeds MSLs regarding wait times for both conventional taxis and WATs.

This section analyses the timing of demand for taxi services in Queensland during 2015. It includes consideration of monthly and seasonal variations, the relative importance of certain days and the profile of demand by hour across an average day. This will help to demonstrate the degree to which meeting demand during peak times cross-subsidises the provision of available and accessible services in off peak times.

5.1 Monthly Demand Profiles

The demand for taxi services is not consistent. It is highly concentrated in certain times of the day, in certain days of the weeks and even in certain months of the year. This timing is heavily influenced by the diversity of demand for taxi services in Queensland. Different groups require taxis at different times for different reasons. This has the effect of creating volatility in the demand profile of taxi services in the State, making the central management and distribution of the taxi fleet a critical feature of the Queensland Taxi Industry.

Data for Queensland provided to TCQ by TBCs reveals a moderate degree of volatility from month to month in taxi trips. February is traditionally the business month for the Queensland Taxi Industry, with business/employment, entertainment travel patterns re-establishing for the year post the Christmas/New Year holidays.

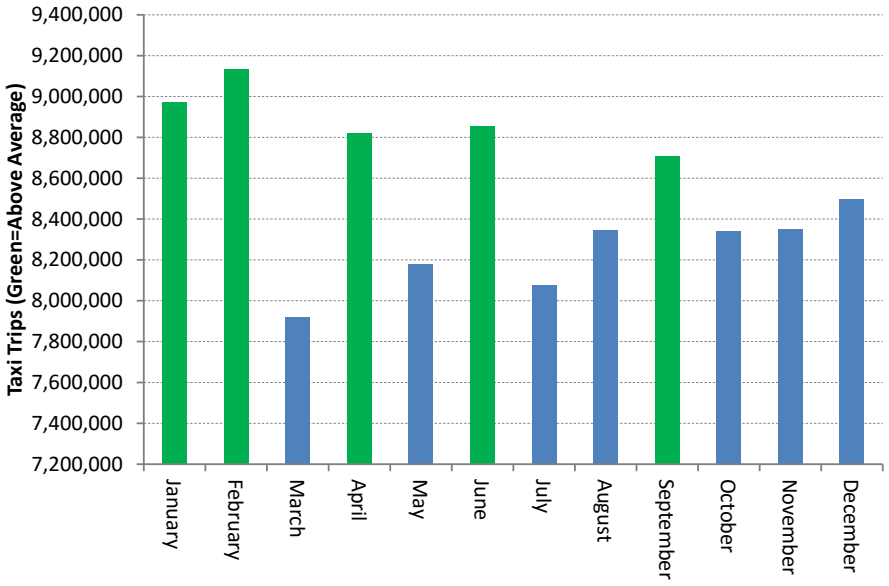


Figure 35 Taxi Trips, by Month, Queensland, 2015[40]

[40] *TCQ (2016) Unpublished data, TCQ, Stones Corner*

The months of April, June and September also correspond to above average trip volumes. These months align with school holiday periods suggesting the role of tourist and visit-related travel in driving higher trip volumes.

Finally, the month of January also records strong volumes. However, discussion with TBCs and taxi operators suggest that these figures are heavily influenced by large trip volumes associated with New Year's Eve celebrations as well as some tourist and visit-related travel during the Christmas holidays.

Overall, the distribution of demand from one month to the next means the taxi industry has a comparably volatile demand profile with limited consistency. This is a challenging environment in which to deliver a service, particularly with the requirement to meet MSLs and USOs throughout the year, regardless of the level of demand from month to month. It also shows the degree to which the activity in some months cross-subsidises the delivery of services in lower volume months.

5.2 Daily and Hourly Demand Profiles

The need for taxis also changes across the week. Analysis of data from TBCs provided to TCQ illustrates a traditional and somewhat expected profile, with demand for taxi services growing over the course of the week, before peaking on Friday.

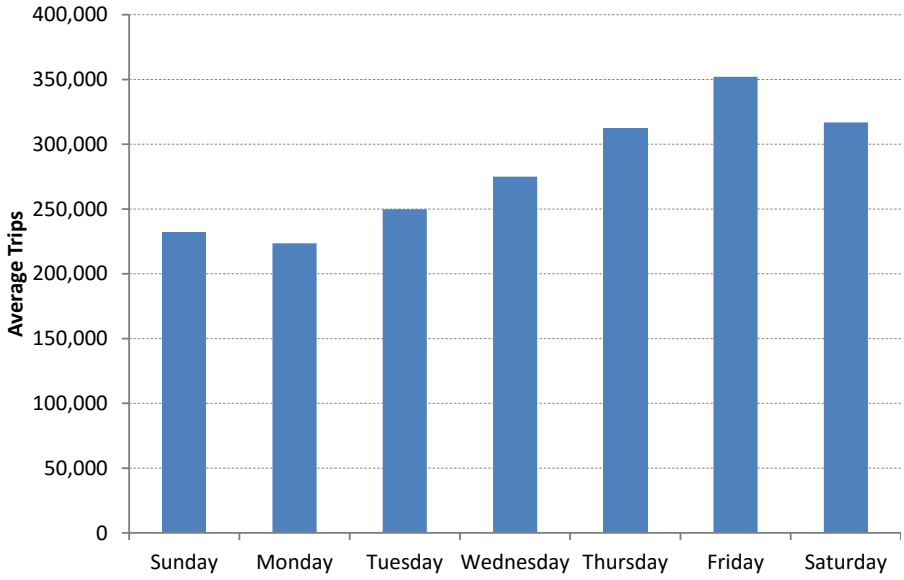


Figure 36 Average Weekly Taxi Trips, by Day, Queensland, 2015[41]

This profile reflects the fact that dual impact of higher volumes of work and business-related travel during the day on Friday and higher entertainment-related trips on Friday nights.

The demand for taxi services can even vary from hour to hour. This applies to both how the customer secures taxi services (refer to section 6.2) as well as the aggregate volumes of trips during this time.

[41] *TCQ (2016) Unpublished data, TCQ, Stones Corner*

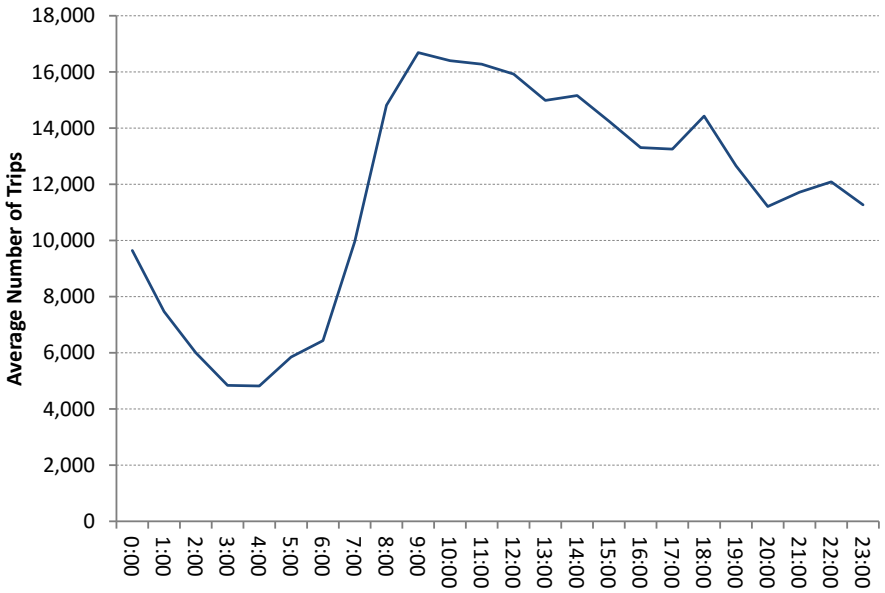


Figure 37 Average Daily Taxi Trips, by Hour, Queensland, 2015

Over the course of 2015, the highest volume of taxi trips in Queensland was at 9:00 am, which corresponds to the start of the workday. This ramps up rapidly from 6:00 am and remains at these levels until after lunchtime. Demand then steadily declines, peaking marginally at 6:00 pm before declining more sharply in the early morning hours.

The hourly profile highlights the degree to which demand for taxi services is linked to the daily business hours. This reflects the important role that business people and workers play in driving taxi demand and therefore its strong correlation with the health and prosperity of the economy.

However, these average hourly figures hide considerable volatility from day to day. While late night and early morning hours generally experience lower trip demand on average, these times are associated with extremely high levels of demand on Friday and (to a lesser extent) Saturday nights. Data analysed by RPS on the Brisbane cab fleet in section 4.4 indicated that there are substantially higher trip volumes than average during the Friday and Saturday PM shifts than the same shifts on other days[42].

This is corroborated by data for the Sunshine Coast for last week of October 2015 (regarded as representative of a standard week), which showed that the number of taxi jobs on Saturday morning between 12:00 am and 4:00 am was 11.9 times higher than the same time period on Thursday morning.

[42] *TCQ (2016) Unpublished data, TCQ, Stones Corner*

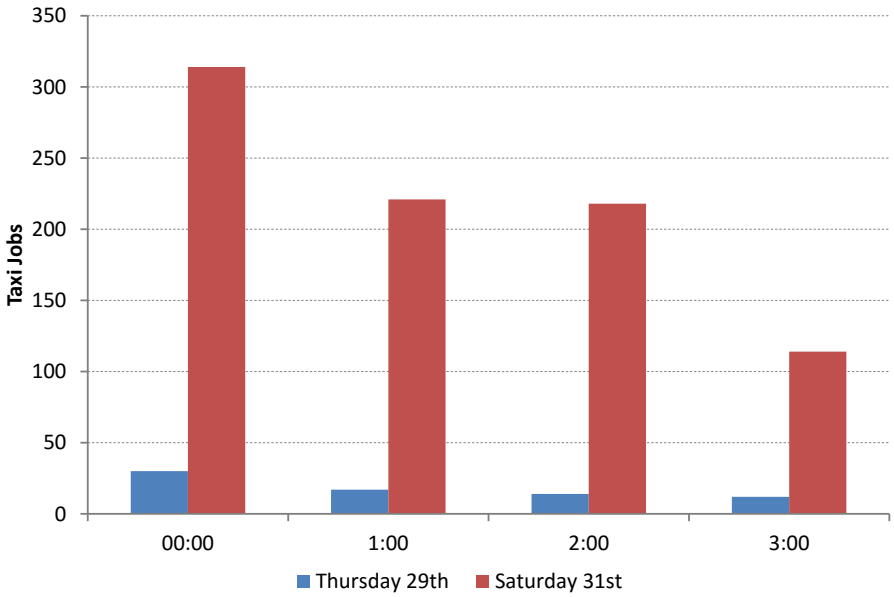


Figure 38 Number of Taxi Jobs, Sunshine Coast, Thursday 29 and Saturday 31 October 2015[43]

5.3 Summary of Findings

This analysis highlights the fact that the timing and distribution of demand is highly volatile and inconsistent over the course of a year, a week or even during a single day. It also demonstrates the fact that the timing profile of the demand for taxi services in Queensland is influenced by a range of interrelated and overlapping factors, reflecting the diverse customer base and community segments services by the Queensland Taxi Industry.

In particular:

- Monthly demand appears to be primarily driven by the school holiday periods, the New Year (impacting January) and the full return of students and workers from the Christmas holidays in February.
- Demand over the course of a week steadily ramps up to its highest point on Friday, when a combination of business/employment and entertainment demand drives trip numbers.
- Hourly demand appears to be primarily driven by the workday, with demand accelerating rapidly up to 9:00 am and remaining at high levels until after midday. It is acknowledged however that these annual averages do not reveal the impact on select days (namely Friday and Saturdays) of entertainment-related travel.

The combination of business, employment, entertainment, tourism/visitation and education/school-related travel on a daily, weekly and monthly basis underpins the complexity and volatility of the demand for taxi services in Queensland. It also highlights the degree to which certain times of the year cross-subsidise the delivery of a universal taxi service during other, lower volume periods.

[43] *TCQ (2016) Unpublished data, TCQ, Stones Corner*

6.0 How Do Queenslanders Catch Taxis?

A major driver globally of the emergence and adoption of "ride sharing" is the booked nature of the travel. In many jurisdictions, including major US, European and Asian countries, taxi services continue to be dominated by the "rank-and-hail" market. Most of these jurisdictions had limited quality-booking options available for customers and the community, creating major gaps in the supply of taxi services.

In this section, RPS examines the way in which Queenslanders secure taxi services in the State and the impact the time of day has on the preferred approach of Queensland.

6.1 Booking vs Rank-and-Hail

Queenslanders are unique in how they catch taxis. Unlike most jurisdictions around Australia and the world, where "rank-and-hail" jobs are the predominant source of taxi work, Queenslanders use a wide range of communication tools to pre-book taxis.

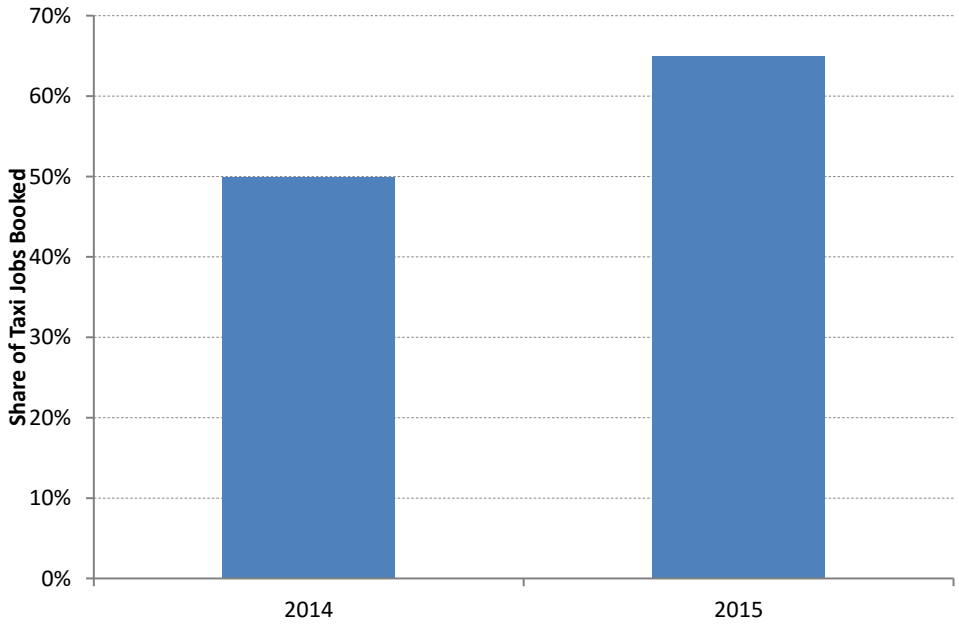


Figure 39 Share of Taxi Jobs Booked, Queensland, 2014 and 2015

Data provided to TCQ by TBCs in Queensland indicated that approximately 65% or two in every three taxi trips was booked[44]. This included a combination of telephone, online and app-based bookings. This share is up by over 10% in 2015, which coincides with the rollout of booking apps by TBCs in many Queensland centres (particularly in South East Queensland).

This share is high by both national and international standards. In Australia, only the Northern Territory has a similar share of taxi trips booked at 60%. However, this is a smaller location – equivalent to half the size of the Sunshine Coast – and not directly comparable with a large State like Queensland[45].

[44] *TCQ (2016) Unpublished data, TCQ, Stones Corner*
[45] *ATIA (2015) Taxi Industry Statistics, 2014, ATIA, Sydney*

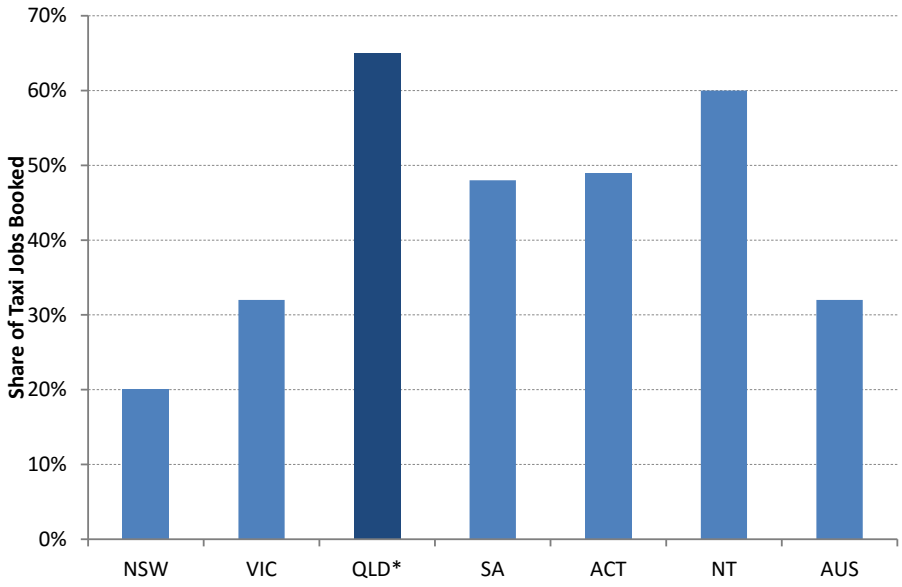


Figure 40 Share of Taxi Jobs Booked, Queensland and Select States, 2014 (*2015 for QLD)

Of greater interest is the low shares of booked taxi trips in New South Wales (20%) and Victoria (31%). In both of these States, the taxi industry can be rightfully and accurately classified as “rank-and-hail” markets, with the share of taxi trips booked through TBCs comparably low. This reflects a combination of factors:

- different industry structures and regulatory frameworks
- the impacts of the de-regulation of taxi supplies in recent years
- softer booking company affiliation requirements
- larger numbers of TBCs, diluting the whole-of-fleet dispatch capacity of any one company

Internationally, the share of taxi services booked by customers is very low. Of the Jurisdictions visited by RPS representatives during our study tour, Singapore had the highest share of taxi trips booked with approximately 20%. In contrast, the structure of London and New York industries make accurate booking estimates difficult as both cities have highly segmented structures. In London, the traditional Black Cab market has very low levels of bookings, reflecting their principal role servicing the City of London and the London Airports. This is analogous with the Yellow Cab fleet in New York that only operate on part of Manhattan Island providing “rank-and-hail” services.

Figure 41 Boro Taxi Service Area and Exclusion Zones (Yellow Cabs), New York[46]

To address these spatial and service shortfalls, both London and New York have secondary taxi industries – minicabs in London and livery or private hire car vehicles in New York – that only accepted booked work. This contrasts with the structure of the Queensland industry, which is a hybrid "rank-and-hail" and booked jurisdiction. This model is regarded as more effective as it provides a much greater level of flexibility in fleet management and was part of the justification for the establishment of Boro Taxis in New York as a hybrid service[47].

In the case of San Francisco, the gap in booked taxi services was partly filled through the creation of TNCs at a State level. These TNCs represent nascent and simplified versions of Queensland TBCs, using less sophisticated technologies and processes than were established by regulation in Queensland in 1994.

This experience highlights the fact that not only is the level of booked services in Queensland unique, but that this is supported by a hybrid industry structure that maximises the accessibility and availability of taxis for all parts of the community.

[46] *NWC TLC (2015) Taxicab Fact Book 2014 accessed at http://www.nyc.gov/html/tlc/downloads/pdf/2014_taxicab_fact_book.pdf*
[47] *NWC TLC (2015) Taxicab Fact Book 2014 accessed at http://www.nyc.gov/html/tlc/downloads/pdf/2014_taxicab_fact_book.pdf*

6.2 Impact of Time of Day on Booking Patterns

The way in which the community catch a taxi depends greatly on the time of day. Rank-and-hail jobs are most prevalent in South East Queensland during the early hours of the morning (between midnight and 3:00 am)[48].

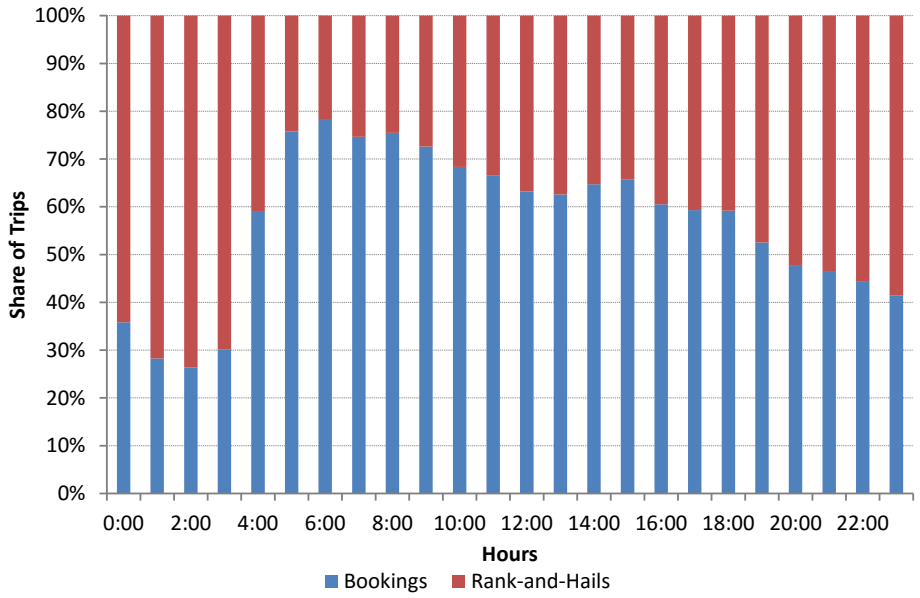


Figure 42 Booking and Rank-and-Hail Shares of Metered Taxi Trips, SEQ, 2015 Average

However, the share booked quickly ramp up to almost four in five trips by 6:00 am after which its share declines steadily across the rest of the day. However, booking a taxi remains the most common way in which customers secure taxi services until 8:00 pm.

This change in consumer behaviour during the course of any 24-hour period is particularly important for TBCs to determine how best to distribute and manage their fleets in order to meet their contractually mandated MSLs and USOs.

6.3 Summary of Findings

Queensland is unique in how we secure taxi services and the way we deliver those services. Unlike almost all other taxi jurisdictions in the world, Queensland can be rightfully classified as a "booked" taxi market.

Further, the hybrid structure – combining "rank-and-hail" and booking – of the Queensland Industry is comparatively unique. Most locations, including London and New York, have segmented industry structures that have primary taxi sectors offering only "rank-and-hail" services and secondary taxi sectors for booked services. RPS considers this industry structure as sub-optimal in maximising fleet efficiency and taxi services availability and accessibility.

[48] *TCQ (2016) Unpublished data, TCQ, Stones Corner*

These unique characteristics of the Queensland Taxi Industry raises questions as to whether “ride sharing”, which is increasingly filling the “booking” gap in international jurisdictions, offers genuine benefits to the Queensland community.

7.0 Demand for Illegal Taxi Services

There is much confusion in the community and among policy makers on how to define "ride sharing" in the Queensland context. Commentary from major "ride sharing" providers such as uber and lyft suggest that "ride sharing" is different from taxi services. The basis for this differentiation however, does not appear to be the nature of the service offered but instead the way in which the service in secured: by an app-based booking and dispatch platform.

This section examines the characteristics and sources of demand for "ride sharing" in the State and the motivation and drivers of some Queenslanders to travel with informal and illegal taxis.

7.1 "Ride sharing" are Informal and Illegal Taxis

Consultation undertaken by RPS of international taxi markets in the US, UK and South East Asia found that the taxi industry in almost all locations lack the presence of major centralised booking and dispatch companies like those that have been operating in Queensland for several decades. This absence of centralised dispatch and bookings has resulted in taxi services being secured by the customer primarily through rank-and-hail. This characteristic is shared with the NSW market, which has the lowest share of booked taxi trips of any Australian State and Territory[49].

As such, "ride sharing" services, such as those provided by uber and lyft, represent a differentiated service offering to the traditional taxi industry only in those Australian and overseas jurisdictions where centralised TBCs, with compulsory affiliation requirements, do not exist. And in these locations, "ride sharing" is only differentiated from taxis by the way in which the service is secured rather than the nature of the service itself (both are on-call, point to point personalised transport).

However, in locations with a strong history of centralised booking – of which Queensland can be rightfully regarded as global best practice – the emergence of "ride sharing" services provide no practical differentiated offering from the existing taxi industry. In fact, the technologies used by "ride sharing" apps are generally of a lower quality and possess a lower capacity than current centralised GIS booking and dispatch software and systems that are at the core of Queensland's taxi industry.

Other differentiations between "ride sharing" services claimed by the large multinational companies include:

- ***Accepting credit card payment*** – this is a major issue in the US but credit cards have been accepted as a form of payment in Queensland since 1990: over 25 years ago.
- ***Vehicle quality*** – again, this was identified as a major issue in other jurisdictions where vehicle quality regulations are not as strict as in Queensland.
- ***Cost*** – it is claimed that "ride sharing" is cheaper than taxi services but such price comparisons are not accurate. Fares in Queensland's taxi industry are regulated by the Government and reflect the high cost impost of complying with customer protection regulations. This claim also does not take into consideration the impact of surge pricing on overall affordability. Consultation by RPS with the taxi industry during State-wide industry workshops identified an emerging trend that customers using "ride sharing" services are gaming the system by booking a "ride sharing" vehicle for their trip to an entertainment precinct, but then avoiding surge pricing on the return trip by catching a taxi with limited waiting time.

[49] *ATIA (2015) Taxi Industry Statistics, 2014, ATIA, Sydney*

- ***Availability*** – it is claimed that "ride sharing" services are more available than taxis, in both more remote and suburban areas and at non-peak times, but this is only the case in locations where the taxi industry is not subject to both MSLs and USOs[50].

In the absence of any differentiated booking offering by "ride sharing" companies in the Queensland context and limited to no flexibility, quality and availability differences, "ride sharing" cannot be practically separated from taxi services. This view is shared by Queenslanders, with the recent market research undertaken by UMR indicating that 68% of people regard uber as a taxi service, including 67% of people who identify themselves as major uber and "ride sharing" supporters and users[51].

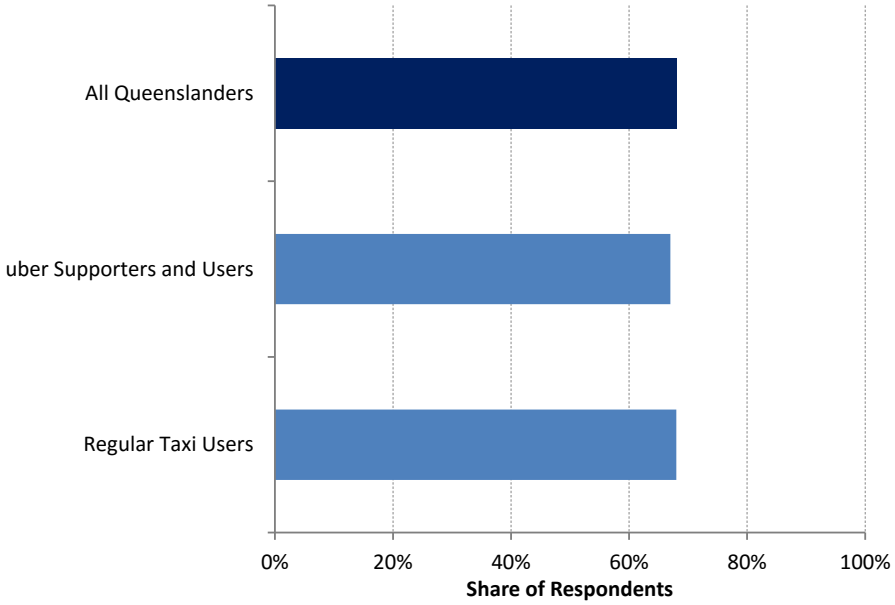


Figure 43 Share of Survey Respondents Who Regard uber as a Taxi Service

At best, "ride sharing" is a form of informal taxi services, similar in character to services that have been operated illegally within the State – particularly regional Queensland. This was confirmed in the recent IPNRC Report on the Transport Legislation (Taxi Services) Amendment Bill 2015 which confirmed:

"At the public briefing the department advised the committee that ride sharing services operate outside the regulations and that "if they are not following the regulations set down by Queensland, it is illegal

They are operating outside the regulations. They do not follow the fare infrastructure in the regulation, they do not have cameras, they do not have meters. They are not following the legislation and the costs of operating..... They do not have a fare infrastructure that is agreed to.... They do not hold taxi licences"[52].

RPS therefore asserts that in Queensland, "ride sharing" services are best defined informal taxi services operating outside of the current laws of the States.

[50] *Motley Fool (2015) Lyft vs. Uber: Just How Dominant Is Uber in the Ridesharing Business? Accessed at http://www.fool.com/investing/general/2015/05/24/lyft-vs-uber-just-how-dominant-is-uber-ridesharing.aspx on 28 February 2016*
[51] *UMR (2016), TCQ - Issues affecting the taxi industry, UMR Strategic Research, Sydney*
[52] *IPNRC (2016) Transport Legislation (Taxi Services) Amendment Bill 2015, accessed at https://www.parliament.qld.gov.au/documents/committees/IPNRC/2016/TLTSAB2015/10-rpt-021-16Mar2016.pdf*

7.2 Level of Demand for Informal Taxi Services

There is limited statistical evidence on the level, extent and character of demand for "ride sharing" services in Australia. Analysis recently commissioned by uber from Deloitte Access Economics claims that uberX provides 14.5 million trips per year in locations in Sydney, Melbourne and Brisbane[53]. This estimate is calculated by annualising the trips from a single month (August 2015) across the entire year: an approach with lacks the necessary evidentiary rigour to be regarded as an accurate and reliable estimate of service demand, especially given the level of demand volatility demonstrated in Section 5.0.

Nevertheless, when compared to taxi trips across the three major Eastern Seaboard States, the demand for informal taxi services currently accounts for only 4.5-6% of all taxi trips[54]. Estimates for the total market share of trips in more locations where informal taxi services are more established (such as in the US) can be as high as 15% in the wider community and 45% in business travel[55].

Arguably these market shares in part reflect the characteristics of US locations where informal taxi services are offered. RPS identified consistent issues of quality, cost, availability and reliability of taxi services across almost all jurisdictions visited by RPS as part of our international consultation. In these circumstances, higher market shares for an alternate form of taxi services ("ride sharing") is to be expected.

In locations that do not share these issues, such as Queensland, the practical market shares of informal taxi services are likely to be constrained. In 2015, the total number of taxi trips in Queensland fell by approximately 5 million trips to 102 million[56]. This represents a fall of 4.6% in the year.

This fall coincided with the introduction of corporately-backed informal taxi services in Brisbane and other select South East Queensland locations. However, the entirety of this fall cannot be attributed to "ride sharing". As highlighted in section 2.0, taxi demand is heavily influenced by a range of other factors.

[53] *Deloitte (2016) Economic Effects of Ridesharing in Australia, Deloitte Access, Melbourne*
[54] *Calculated using ATIA data on taxi trips for NSW, Qld, and Victoria for 2014/15*
[55] *Certify (2015) Sharing the Road: Business Travelers Increasingly Choose Uber accessed at http://www.certify.com/infograph-sharing-the-road.aspx on 28 February 2016*
[56] *ATIA (2015) Taxi Industry Statistics, 2014, ATIA, Sydney*

7.3 Impact of Informal Taxi Services

Multi-variate regression analysis of taxi trips volumes in Queensland over the past decade by RPS suggests that almost half (48.7%) of the movement in taxi trips in any year can be attributed to changes in the Queensland economy, with a further 28.4% due to higher private passenger vehicle numbers and 14.3% associated with slower population growth.

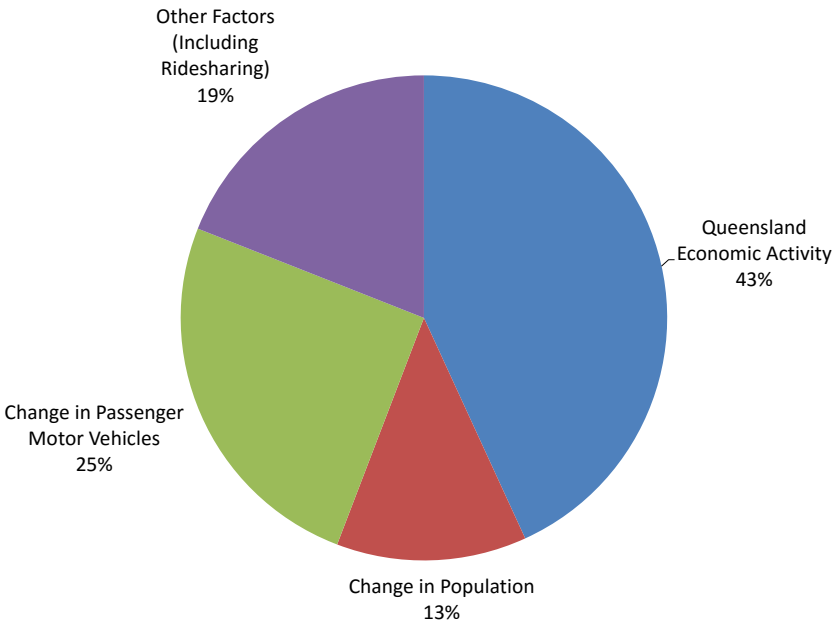


Figure 44 Contribution to the Movement in Taxi Trips Each Year, Queensland, 2004-2015[57]

The Other Factors category, which includes "ride sharing" also includes non-ride sharing issues including:

- The growth of informal point-to-point passenger services offered by clubs, RSLs and aged care and nursing homes using Commonwealth and State Government-funded community transport services.
- The increased growth of illegal taxi services in regional Queensland, which predate illegal services in South East Queensland but that have become more overt and extensive over the past 18 months.
- Volatile tourism and visitation numbers over the time period in response to changing global economic conditions, major global shocks (such as health and medical alerts) and the value of the Australian dollar.

Overall, RPS estimates that the impact to date of informal illegal taxi operations in South East Queensland has been less than 1% of trips. This is a comparatively low take up of services in Queensland, likely due to limited differentiation of "ride sharing", but also partly reflects the comparatively new nature of corporately-back illegal taxi services in South East Queensland.

[57] *Based on multi-variate regression analysis of taxi trips in Queensland between 2004 and 2015 and select independent variables identified by RPS and from industry consultation and research.*

7.4 Source and Reasons for Using Illegal Taxi Services

Analysis of the results of the recent survey of Queenslanders by UMR revealed that only 12% of Queenslanders classify themselves as "Established or Regular" users of uber in the State. A further 11% claim to have "experimented" with uber. However, the vast majority of Queenslanders have not used uber or any other "ride sharing" service in the State[58].

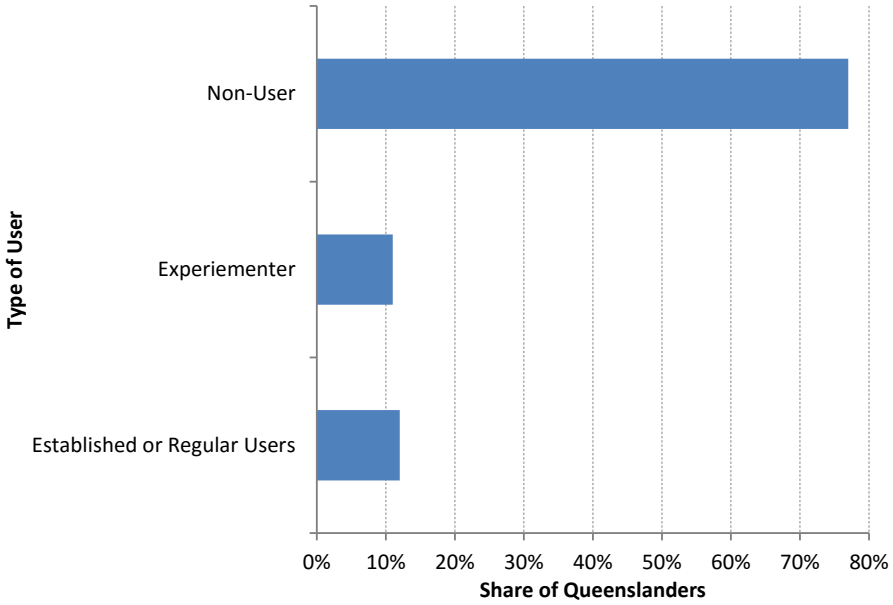


Figure 45 Share of Queenslanders by Level of Use of uber Taxi Services, February 2016

Interestingly, Queenslanders have similar views regarding uber as they do about the Queensland Taxi Industry, with 30-32% of the population have negative views of the sector. For those people who have a positive view of uber and "ride sharing" the main attributes sighted were the price of fares and the ease of booking via the app. In contrast, positive attributes of taxis included:

- Government Regulation
- Services for Disabled Passengers
- Safety/Personal Security
- Ease of Booking via Phone
- Driver's Knowledge and Skills[59]

UMR estimates that approximately 4% of Queenslanders can be regarded, from their views expressed in the survey, as strong supporters of uber. These supports have a core set of socio-economic and demographic characteristics including:

- Living in the Brisbane or Gold Coast (79%)
- Young professional and "no-kids" households (67%)

[58] *UMR (2016), TCQ - Issues affecting the taxi industry, UMR Strategic Research, Sydney*
[59] *UMR (2016), TCQ - Issues affecting the taxi industry, UMR Strategic Research, Sydney*

- Aged 18-29 (59%)
- Employed (94%) in full-time work (58%)
- University education (40%)[60]

The conformity and homogeneity of this demographic and socio-economic profile of uber supporters suggests that the "ride sharing" principally appeals to and is demanded by a very narrow segment of the community.

This raises a serious concern regarding the prominence that "ride sharing" appears to be afforded by the OPT Review. The current regulatory framework for taxis, including MSLs and USOs enforced by unique Service Contracts, is intentionally structured to maximise the benefit for the community as a whole and for those people and groups in society most in need of support.

In contrast, supporters and users of "ride sharing" have a much narrower set of demographic and socio-economic characteristics are not necessarily representative of the diversity of the wider community.

[60] *UMR (2016), TCQ - Issues affecting the taxi industry, UMR Strategic Research, Sydney*

8.0 Conclusions

Taxis are one of the most popular, pervasive and universal forms of public transport in the State. Second only to buses in terms of the number of passengers moved, taxis offer a flexible, point-to-point passenger transport services that is available and accessible to all. Demand for taxis are heavily influenced by a range of socio-economic megatrends including population and economic growth profiles, ageing and disability rates and the level of private motor vehicle ownership.

Taxi demand has grown strongly in recent years, reflecting a high usage rate by the Queensland population, but has been impacted recently by the emergence of illegal taxi services. Queenslanders not only use taxis more often, but they travel further and in larger groups, reinforcing the unique characteristics of Queensland taxi demand. Taxis are also better value for money in Queensland than in other Australian States, though the cost and transparency of fares is the most common negative factor in assessments of customer satisfaction levels.

Overall, Queenslanders are very satisfied with their taxi services, rating the Queensland Taxi Industry highly across a range of characteristics and attributes including cleanliness, ease of booking, security, driver manner, knowledge and skills and availability.

Queenslanders catch taxis all year round with months associated with school holidays and the beginning of the work year accounting for the highest share of demand. Demand is skewed slightly towards the end of the week, with Thursday, Friday and Saturdays accounting for the largest share of weekly taxi trips. However, the difference between the number of trips on an average Monday and an average Saturday is not as large as could be expected and reflects both the composition and structural nature of demand. Demand is also relatively balanced between morning and evening demand on an average day, reflecting the role of taxis in serving both business and entertainment-related travellers.

Demand for taxis is diverse including both discretionary and non-discretionary users. Two thirds of Queenslanders identify themselves as non-discretionary users, confirming the high level of reliance of the population on taxi services in the State.

Analysis of select cohorts of the community demonstrates the diversity of sources of demand for taxi services, with people with disabilities and in wheelchairs representing the single largest cohesive group, ahead of both entertainment and tourism and airport-related travel.

Figure 46 Examples of Different Taxi Users, Queensland, 2015

Taxi User	Estimated Trips
People with Disabilities and in Wheelchairs	7.40 million
Tourism and Airport Travel	4.76 million
Entertainment-Related Travel (Brisbane Only)	4.65 million
Employment-Related Travel	3.41 million
Children and Minors	1.04 million
General Business and Community Users	80.8 million

Queenslanders are unique in how they catch taxis. Unlike most jurisdiction around the Australia and the world, Queenslanders use a wide range of communication tools to pre-book taxis. Over 65% of taxi trips were booked in 2015, the highest share in the world. This booking culture in Queensland differentiates the State from other jurisdictions that have segmented and demarcated supply structures (separating “rank-and-hail” and “booked” markets) thus raising questions as to the genuine value proposition of a “ride sharing” model in the State.

"Ride sharing" offers little new to the Queensland community. The existence of a strong booking culture in the State, coupled with a long history of sophisticated computerised central booking and dispatch capabilities means Queensland does not have the same "service gap" of many national and overseas jurisdictions. Instead, "ride sharing" services are similar in most ways to the Queensland Taxi Industry in the State, a fact reflected in the views of a majority Queenslanders that regard uber as simply another type of taxi.

Instead, "ride sharing" in the Queensland context is merely a form of informal and therefore illegal taxi service. "Ride sharing" is neither new nor an improvement on current services and does not provide a net benefit to the community. It currently services only a small and homogenous segment of the Queensland population and lacks the diversity of demand supported by the Queensland Taxi Industry

Price appears to be the primary motivation for those Queenslanders who use illegal taxi services, with Queensland taxis rating well in terms of punctuality, accessibility and availability. However, the major reason for this lower cost is the fact that illegal taxis do not comply with the State's stringent regulatory framework for taxi services. Further, the Queensland Taxi Industry does not set fares, which are regulated by the Government to provide certainty and reduce opportunities for exploitation of customers.

It is therefore important, when considering the reform of the regulatory framework in Queensland, to prioritise the Queensland community as a whole, rather than the individual consumer. A framework that focuses on individual customers lacks longevity and sustainability and results in the benefits of the taxi industry being concentrated in the hands of a small number of discretionary users to the detriment of more vulnerable non-discretionary user groups.

Instead, the long-term prosperity of the State and welfare of the population is contingent on a regulatory framework that puts the needs of all members of the community first.

Appendix 1 – Estimated Residential Population, Queensland

Data on the size of population growth in Queensland, from June 1981 to September 2015.

Quarter	Estimated Residential Population	Quarterly Growth	Annual Growth
Jun-1981	2,345,208		
Sep-1981	2,367,477	22,269	
Dec-1981	2,387,943	20,466	
Mar-1982	2,406,355	18,412	
Jun-1982	2,424,586	18,231	79,378
Sep-1982	2,442,912	18,326	75,435
Dec-1982	2,456,475	13,563	68,532
Mar-1983	2,469,709	13,234	63,354
Jun-1983	2,482,282	12,573	57,696
Sep-1983	2,493,373	11,091	50,461
Dec-1983	2,503,285	9,912	46,810
Mar-1984	2,513,443	10,158	43,734
Jun-1984	2,523,859	10,416	41,577
Sep-1984	2,535,976	12,117	42,603
Dec-1984	2,547,078	11,102	43,793
Mar-1985	2,559,452	12,374	46,009
Jun-1985	2,571,218	11,766	47,359
Sep-1985	2,583,368	12,150	47,392
Dec-1985	2,597,100	13,732	50,022
Mar-1986	2,610,205	13,105	50,753
Jun-1986	2,624,595	14,390	53,377
Sep-1986	2,636,477	11,882	53,109
Dec-1986	2,648,778	12,301	51,678
Mar-1987	2,662,654	13,876	52,449
Jun-1987	2,675,107	12,453	50,512
Sep-1987	2,688,129	13,022	51,652
Dec-1987	2,703,516	15,387	54,738
Mar-1988	2,723,992	20,476	61,338
Jun-1988	2,739,907	15,915	64,800
Sep-1988	2,760,389	20,482	72,260
Dec-1988	2,780,869	20,480	77,353
Mar-1989	2,806,845	25,976	82,853
Jun-1989	2,827,637	20,792	87,730
Sep-1989	2,847,045	19,408	86,656
Dec-1989	2,864,007	16,962	83,138
Mar-1990	2,884,170	20,163	77,325
Jun-1990	2,899,283	15,113	71,646
Sep-1990	2,913,538	14,255	66,493
Dec-1990	2,928,713	15,175	64,706

Quarter	Estimated Residential Population	Quarterly Growth	Annual Growth
Mar-1991	2,947,512	18,799	63,342
Jun-1991	2,960,951	13,439	61,668
Sep-1991	2,975,984	15,033	62,446
Dec-1991	2,990,441	14,457	61,728
Mar-1992	3,010,322	19,881	62,810
Jun-1992	3,023,198	12,876	62,247
Sep-1992	3,041,149	17,951	65,165
Dec-1992	3,057,138	15,989	66,697
Mar-1993	3,081,331	24,193	71,009
Jun-1993	3,096,185	14,854	72,987
Sep-1993	3,115,843	19,658	74,694
Dec-1993	3,130,986	15,143	73,848
Mar-1994	3,151,365	20,379	70,034
Jun-1994	3,166,566	15,201	70,381
Sep-1994	3,184,148	17,582	68,305
Dec-1994	3,198,877	14,729	67,891
Mar-1995	3,218,314	19,437	66,949
Jun-1995	3,237,380	19,066	70,814
Sep-1995	3,255,117	17,737	70,969
Dec-1995	3,271,743	16,626	72,866
Mar-1996	3,289,507	17,764	71,193
Jun-1996	3,303,192	13,685	65,812
Sep-1996	3,318,599	15,407	63,482
Dec-1996	3,330,579	11,980	58,836
Mar-1997	3,343,777	13,198	54,270
Jun-1997	3,355,417	11,640	52,225
Sep-1997	3,369,184	13,767	50,585
Dec-1997	3,380,394	11,210	49,815
Mar-1998	3,393,483	13,089	49,706
Jun-1998	3,404,484	11,001	49,067
Sep-1998	3,416,076	11,592	46,892
Dec-1998	3,427,505	11,429	47,111
Mar-1999	3,442,196	14,691	48,713
Jun-1999	3,453,936	11,740	49,452
Sep-1999	3,466,399	12,463	50,323
Dec-1999	3,481,034	14,635	53,529
Mar-2000	3,497,147	16,113	54,951
Jun-2000	3,509,458	12,311	55,522
Sep-2000	3,523,446	13,988	57,047
Dec-2000	3,537,670	14,224	56,636
Mar-2001	3,556,466	18,796	59,319
Jun-2001	3,571,469	15,003	62,011
Sep-2001	3,590,969	19,500	67,523
Dec-2001	3,611,203	20,234	73,533

Quarter	Estimated Residential Population	Quarterly Growth	Annual Growth
Mar-2002	3,631,451	20,248	74,985
Jun-2002	3,653,123	21,672	81,654
Sep-2002	3,676,870	23,747	85,901
Dec-2002	3,700,791	23,921	89,588
Mar-2003	3,723,239	22,448	91,788
Jun-2003	3,743,121	19,882	89,998
Sep-2003	3,765,109	21,988	88,239
Dec-2003	3,788,560	23,451	87,769
Mar-2004	3,810,921	22,361	87,682
Jun-2004	3,829,970	19,049	86,849
Sep-2004	3,849,852	19,882	84,743
Dec-2004	3,872,351	22,499	83,791
Mar-2005	3,896,951	24,600	86,030
Jun-2005	3,918,494	21,543	88,524
Sep-2005	3,940,494	22,000	90,642
Dec-2005	3,964,175	23,681	91,824
Mar-2006	3,987,653	23,478	90,702
Jun-2006	4,007,992	20,339	89,498
Sep-2006	4,031,580	23,588	91,086
Dec-2006	4,055,845	24,265	91,670
Mar-2007	4,084,531	28,686	96,878
Jun-2007	4,111,018	26,487	103,026
Sep-2007	4,134,958	23,940	103,378
Dec-2007	4,159,990	25,032	104,145
Mar-2008	4,191,479	31,489	106,948
Jun-2008	4,219,505	28,026	108,487
Sep-2008	4,247,991	28,486	113,033
Dec-2008	4,275,551	27,560	115,561
Mar-2009	4,305,605	30,054	114,126
Jun-2009	4,328,771	23,166	109,266
Sep-2009	4,350,135	21,364	102,144
Dec-2009	4,367,454	17,319	91,903
Mar-2010	4,387,801	20,347	82,196
Jun-2010	4,404,744	16,943	75,973
Sep-2010	4,421,470	16,726	71,335
Dec-2010	4,436,882	15,412	69,428
Mar-2011	4,457,971	21,089	70,170
Jun-2011	4,476,778	18,807	72,034
Sep-2011	4,498,204	21,426	76,734
Dec-2011	4,518,605	20,401	81,723
Mar-2012	4,545,421	26,816	87,450
Jun-2012	4,568,205	22,784	91,427
Sep-2012	4,590,528	22,323	92,324
Dec-2012	4,608,886	18,358	90,281

Quarter	Estimated Residential Population	Quarterly Growth	Annual Growth
Mar-2013	4,631,968	23,082	86,547
Jun-2013	4,651,359	19,391	83,154
Sep-2013	4,670,132	18,773	79,604
Dec-2013	4,685,080	14,948	76,194
Mar-2014	4,704,807	19,727	72,839
Jun-2014	4,719,925	15,118	68,566
Sep-2014	4,737,674	17,749	67,542
Dec-2014	4,749,090	11,416	64,010
Mar-2015	4,765,396	16,306	60,589
Jun-2015	4,778,854	13,458	58,929
Sep-2015	4,792,906	14,052	55,232

Appendix 2 – Gross State Product

Data on the change in the Gross State Product of Queensland, total and per capita at current prices.

Year	GSP ($m)	GSP Per Capita
Jun-1990	$60,483	$21,118
Jun-1991	$61,740	$21,081
Jun-1992	$65,419	$21,876
Jun-1993	$71,095	$23,255
Jun-1994	$75,297	$24,049
Jun-1995	$81,658	$25,527
Jun-1996	$86,373	$26,400
Jun-1997	$92,550	$27,788
Jun-1998	$97,649	$28,887
Jun-1999	$102,385	$29,872
Jun-2000	$108,635	$31,208
Jun-2001	$117,074	$33,094
Jun-2002	$129,472	$35,853
Jun-2003	$136,325	$36,837
Jun-2004	$151,170	$39,902
Jun-2005	$168,774	$43,584
Jun-2006	$192,823	$48,641
Jun-2007	$214,833	$52,969
Jun-2008	$232,195	$55,816
Jun-2009	$259,902	$60,788
Jun-2010	$252,946	$57,916
Jun-2011	$269,289	$60,693
Jun-2012	$289,077	$63,975
Jun-2013	$290,416	$63,012
Jun-2014	$298,680	$63,751
Jun-2015	$305,354	$64,280

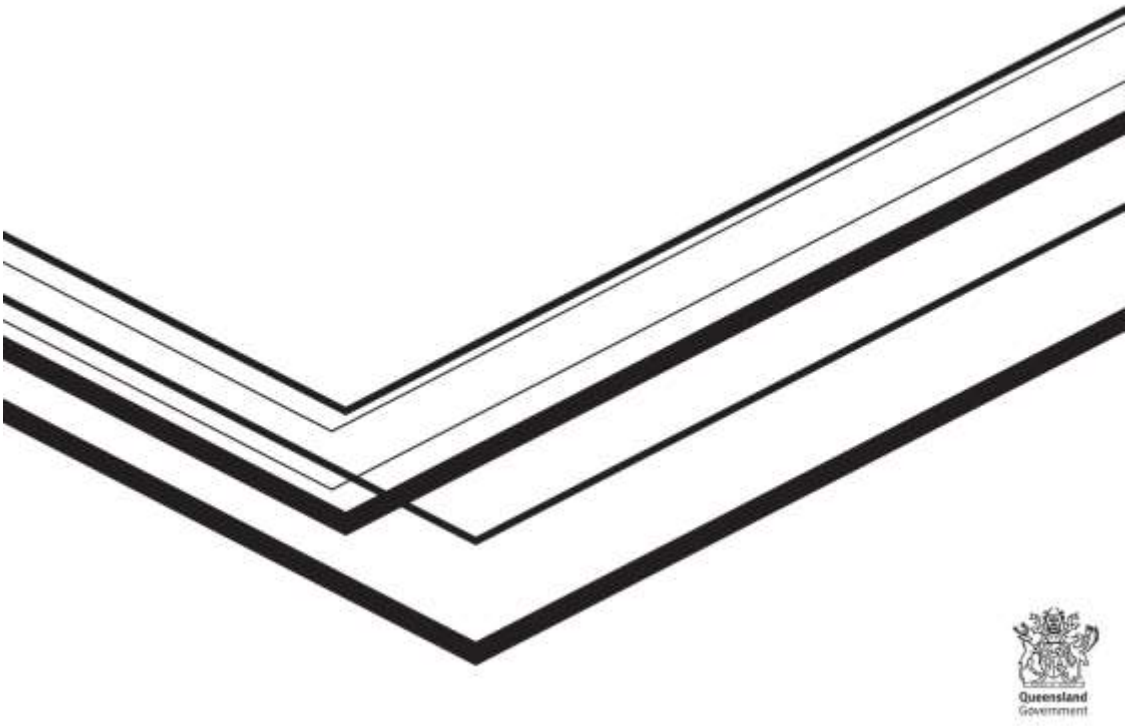
Appendix 3 – Queensland Budget Service Delivery Statement DTMR

Select pages from the Service Delivery Statement of the Department of Transport and Main Roads in the 2015/16 Budget of the Queensland Government.

Queensland Budget 2015-16

Service Delivery Statements

Department of Transport and Main Roads



Queensland Government

Customer Experience

Service area objective

To deliver and improve the experience for customers who access TMR products, services and infrastructure including licensing and registration, public transport and roads.

Service area description

Products and services are delivered to the community via self-service and assisted channels. TMR is delivering services with a 'customers first' approach, engaging with customers to better understand their needs and behaviours with regard to:

- licensing services
- registration services
- passenger transport services
- roads usage
- maritime safety information.

2015-16 service area highlights

The department will build on its 2014-15 achievements and continue its focus on delivering the Government's commitments for the people of Queensland, with 2015-16 highlights under this service area to include:

- embedding the customer experience approach within all departmental activities
- introducing additional online customer services such as:
  - a direct debit registration renewal scheme that allows customers to pay their registration renewals by regular direct debit in smaller more manageable amounts
  - eTicketing for a range of infringements and registration transfers online
  - an electronic logbook for learner drivers and electronic notifications to customers.

Department of Transport and Main Roads	Notes	2014-15 Target/Est.	2014-15 Est. Actual	2015-16 Target/Est.
Service area: Customer Experience	1			
Service standards *Effectiveness measures*				
Average wait time in Customer Service Centres (minutes)	T,2	8	7	8
Percentage of call centre calls answered within three minutes	T,2,3	80	59	80
Overall customer satisfaction with transactional services (on a scale of 1 to 10)	T,2,4	8	8.3	8
Customer satisfaction ratings of public transport by service type (using a 0 - 100 index – 100 being excellent)	T,5,6			
Whole of Queensland Taxi	7	≥69	65	≥69
South-east Queensland Bus		≥70	70	≥70
Rail		≥70	70	≥70

Passenger Transport Services

Service area objective

To lead and shape Queensland's passenger transport system, by providing an integrated transport network, safe and accessible to all.

Service area description

This service area facilitates passenger transport systems across the State and aims to provide a single integrated transport system allowing fair access to everyone. Key passenger transport activities managed by this service area include:

- providing funding for fair access to public transport to deliver economic, social and community benefits for Queenslanders
- effectively managing and regulating the passenger transport industry
- enhancing customer experience by improving service integration, passenger information and ticketing products
- driving efficiencies through network optimisation and next generation service contracts
- supporting public transport patronage increases by maximising our service offering, extending the network and delivering innovative ticketing products
- overseeing and funding the School Transport Assistance Scheme.

2015-16 service area highlights

The department will build on its 2014-15 achievements and continue its focus on delivering the Government's commitments for the people of Queensland, with 2015-16 highlights under this service area to include:

- undertaking a fare review of passenger transport services on the TransLink network in south-east Queensland
- providing accessible passenger transport to local residents by implementing the Cape York and Gulf fare scheme
- commencing rail passenger services between Petrie and Kippa-Ring station on the Moreton Bay Rail Link
- continuing the New Generation Rolling Stock project to deliver 75 new six car train sets for south-east Queensland
- delivering additional public transport infrastructure including Deception Bay – Bay Avenue Bus Station, Warrigal Road Green Link, Kawana Bus Station (stage 2) and Mains Road transit way stops.

Department of Transport and Main Roads	Notes	2014-15 Target/Est.	2014-15 Est. Actual	2015-16 Target/Est.
Service area: Passenger Transport Services				
Service standards *Effectiveness measures*				
Wheelchair accessible taxi response times compared to conventional taxi fleet response times	T			
Peak Percentage within 18 minutes - Conventional		85	95	85
- Wheelchair		85	85	85
Percentage within 30 minutes - Conventional		95	97	95
- Wheelchair		95	94	95
Off peak Percentage within 10 minutes		85	88	85

2015-16 Queensland State Budget – Service Delivery Statements – Department of Transport and Main Roads 14

Department of Transport and Main Roads	Notes	2014-15 Target/Est.	2014-15 Est. Actual	2015-16 Target/Est.
- Conventional				
- Wheelchair	1	85	75	85
Percentage within 20 minutes - Conventional		95	97	95
- Wheelchair		95	90	95
Patronage on Government contracted services (millions)	T			
South-east Queensland		180.48	176.27	179.74
Bus	2	117.69	113.62	115.81
Rail		49.52	50.19	51.10
Light rail		5.70	6.18	6.81
Ferry	3	7.57	6.28	6.02
Rest of Queensland		12.35	12.29	12.09
Regional air	4	0.40	0.42	0.27
Long distance bus	5	0.12	0.08	0.06
Regional urban bus		11.45	11.45	11.45
TravelTrain	6,7	0.37	0.34	0.31
Average on-time running performance in peak times – CityTrain	T	95%	98%	95%
Percentage of scheduled services delivered – CityTrain	T	99.87	99.80	99.50
Efficiency measures				
Average subsidy per trip provided through the Taxi Subsidy Scheme	T	$7.88	$7.88	$8.05
Average subsidy per passenger on Government contracted services	T			
Regional air	8	$22.74	$21.85	$18.30
Long distance bus	9	$38.38	$51.28	$78.77
Regional urban bus		$3.36	$3.23	$3.22
TravelTrain	10	$462.77	$505.27	$ 541.28
Average cost of subsidy per passenger trip in SEQ – bus, rail, light rail and ferry	T	$7.10	$6.78	$6.82

Notes:

T. Denotes service standards for which accountability rests with the Deputy Premier, Minister for Transport, Minister for Infrastructure, Local Government and Planning and Minister for Trade.

1. Response times for wheelchair accessible jobs are longer than response times for conventional taxis. This may be due to drivers not prioritising wheelchair work or because they are engaged in providing other services under a contract with other entities such as Department of Veterans' Affairs.
2. The decrease in bus patronage is due to the mode shift from bus services to G:Link light rail services which commenced in July 2014.
3. The decrease in ferry patronage is due to timetable changes and ferry terminal closures/works.
4. The 2015-16 regional air patronage target/estimate has decreased due to a reduction in government contracted routes. New regional air contracts commenced on 1 January 2015 for seven contracted routes. Three routes were deregulated.
5. The decrease in long distance bus patronage is due to increased competition from other long distance bus and air operators, and a drop off in resource sector activity in some parts of regional Queensland.
6. The decrease in TravelTrain patronage is due to changes to the Westlander and Inlander service offering. Competition with other transport modes is maintaining downward pressure for TravelTrain services and reflects a continuation of historical trends of decreasing patronage.

7. The 2015-16 patronage Target/Estimate has decreased as electric tilt trains will be out-of-service for scheduled maintenance. The replacement diesel trains have lower seating capacity and will add additional time to the customer's journey.
8. New regional air contracts commenced on 1 January 2015. The new contracts operate under a risk/revenue-sharing funding model which has resulted in a change to the calculation methodology to include operator revenue in this service standard. The 2015-16 Target/Estimate has been adjusted accordingly.
9. New long distance bus contracts commenced on 1 January 2015. The new contracts operate under a risk/revenue-sharing funding model which has resulted in a change to the calculation methodology to include operator revenue in this service standard. Increasing average subsidy on long distance bus services can be attributed to an additional four contracted routes and declining patronage.
10. Increasing average subsidy on TravelTrain services is due to declining patronage and indexation on cost of service.

Appendix 4 – Disability Standards for Accessible Public Transport

The contents of the Australian Government's *Disability Standards for Accessible Public Transport 2002*.

Part 1	Preliminary	
Division 1.1	Purpose and application of Standards	
	1.1	Name of Standards
	1.2	Purpose of Standards
	1.3	Acknowledgment of rights of passengers, operators and providers
	1.4	Application of Standards
	1.5	Guidelines
	1.6	Incorporation of Australian Standards and Australian Design Rules
	1.7	Applicability of Standards
Division 1.2	Meaning of important terms	
	1.8	Purpose of Division 1.2
	1.9	Access path
	1.1	Airport that does not accept regular public transport services
	1.11	Allocated space
	1.12	Conveyance
	1.13	Dedicated school bus and dedicated school bus service
	1.14	Dial-a-ride service
	1.15	Direct assistance
	1.16	Equivalent access
	1.17	Hail-and-ride service
	1.18	Infrastructure
	1.19	Manoeuvring areas
	1.2	Operator
	1.21	Premises
	1.22	Provider
	1.23	Public transport service
	1.24	Small aircraft
Part 2	Access paths	
	2.1	Unhindered passage
	2.2	Continuous accessibility
	2.3	Path branching into 2 or more parallel tracks
	2.4	Minimum unobstructed width
	2.5	Poles and obstacles, etc
Part 3	Manoeuvring	

	areas	
	3.1	Circulation space for wheelchairs to turn in
	3.2	Access for passengers in wheelchairs, etc
	3.3	Limited on-board manoeuvring
Part 4	Passing areas	
	4.1	Minimum width
	4.2	Two-way access paths and aerobridges
Part 5	Resting points	
	5.1	When resting points must be provided
Part 6	Ramps	
	6.1	Ramps on access paths
	6.2	Boarding ramps
	6.3	Minimum allowable width
	6.4	Slope of external boarding ramps
	6.5	Slope of ramps connected to pontoon wharves
Part 7	Waiting areas	
	7.1	Minimum number of seats to be provided
	7.2	Minimum number of allocated spaces to be provided
Part 8	Boarding	
	8.1	Boarding points and kerbs
	8.2	When boarding devices must be provided
	8.3	Use of boarding devices
	8.4	Hail-and-ride services
	8.5	Width and surface of boarding devices
	8.6	Maximum load to be supported by boarding device
	8.7	Signals requesting use of boarding device
	8.8	Notification by passenger of need for boarding device
Part 9	Allocated space	
	9.1	Minimum size for allocated space
	9.2	Minimum number of allocated spaces to be provided
	9.3	Minimum head room
	9.4	Number of allocated spaces to be provided — buses
	9.5	Number of allocated spaces to be provided — ferries
	9.6	Number of allocated spaces to be provided — train cars, etc
	9.7	Consolidation of allocated spaces
	9.8	Allocated spaces in aircraft and coaches
	9.9	Use of allocated space for other purposes
	9.1	International symbol of accessibility to be displayed
	9.11	Movement of mobility aid in allocated space
Part 10	Surfaces	
	10.1	Compliance with Australian Standard
Part 11	Handrails and grabrails	

	11.1	Compliance with Australian Standard — premises and infrastructure
	11.2	Handrails to be provided on access paths
	11.3	Handrails on steps
	11.4	Handrails above access paths
	11.5	Compliance with Australian Standard
	11.6	Grabrail to be provided where fares are to be paid
	11.7	Grabrails to be provided in allocated spaces
Part 12	Doorways and doors	
	12.1	Doors on access paths
	12.2	Compliance with Australian Standard — premises and infrastructure
	12.3	Weight activated doors and sensors
	12.4	Clear opening of doorways
	12.5	Vertical height of doorways
	12.6	Automatic or power-assisted doors
Part 13	Lifts	
	13.1	Compliance with Australian Standard — premises and infrastructure
Part 14	Stairs	
	14.1	Stairs not to be sole means of access
	14.2	Compliance with Australian Standards — premises and infrastructure
	14.3	Compliance with Australian Standards — conveyances
	14.4	Compliance with Australian Design Rule 58 — conveyances
Part 15	Toilets	
	15.1	Unisex accessible toilet — premises and infrastructure
	15.2	Location of accessible toilets
	15.3	Unisex accessible toilet — ferries and accessible rail cars
	15.4	Requirements for accessible toilets — ferries and accessible rail cars
	15.5	Accessible toilet to be provided — aircraft
	15.6	Stops to be offered if accessible toilet not provided — coaches
Part 16	Symbols	
	16.1	International symbols for accessibility and deafness
	16.2	Compliance with AS2899.1 (1986)
	16.3	Accessibility symbols to incorporate directional arrows
	16.4	Accessibility symbol to be visible on accessible buses
	16.5	Accessibility symbol to be visible on accessible doors
Part 17	Signs	
	17.1	Height and illumination
	17.2	Location — premises and infrastructure
	17.3	Location — conveyances
	17.4	Destination signs to be visible from boarding point
	17.5	Electronic notices
	17.6	Raised lettering or symbols or use of Braille
	17.7	Taxi registration numbers

Part 18	Tactile ground surface indicators	
	18.1	Location
	18.2	Style and dimensions
	18.3	Instalment at accessible bus boarding points
	18.4	Instalment at railway stations
	18.5	Instalment at wharves
Part 19	Alarms	
	19.1	Emergency warning systems
Part 20	Lighting	
	20.1	Illumination levels
Part 21	Controls	
	21.1	Compliance with Australian Standard — premises and infrastructure
	21.2	Passenger-operated devices for opening and closing doors
	21.3	Location of passenger-operated controls for opening and locking doors
	21.4	Signal devices for conveyances that stop on request
Part 22	Furniture and fitments	
	22.1	Tables, benches, counters, etc
	22.2	Information desks, check-in counters, etc — airports
	22.3	Accessible sleeping berths — ferries and trains
	22.4	Accessible sleeping berths — ferries
	22.5	Accessible sleeping berths — trains
	22.6	Accessible berths to be connected to access path — ferries and trains
Part 23	Street furniture	
	23.1	Seats
Part 24	Gateways	
	24.1	Gateways and checkouts
Part 25	Payment of fares	
	25.1	Passengers to pay fares
	25.2	Fare payment and ticket validation systems
	25.3	Vending machines
	25.4	Circulation space in front of vending machine
Part 26	Hearing augmentation–listening systems	
	26.1	Public address systems
Part 27	Information	
	27.1	Access to information about transport services
	27.2	Direct assistance to be provided
	27.3	Size and format of printing
	27.4	Access to information about location
Part 28	Booked services	
	28.1	Notice of requirement for accessible travel

	28.2	Period of notice of requirement for accessible travel
	28.3	Location of carers, assistants and service animals
	28.4	Accessible seats to be available for passengers with disabilities
Part 29	Food and drink services	
	29.1	Equal access to food and drink services
	29.2	Distance around accessible tables
	29.3	Space for passengers using mobility aids
Part 30	Belongings	
	30.1	Disability aids to be in addition to baggage allowance
Part 31	Priority	
	31.1	Priority seating
	31.2	Information to be provided about vacating priority seating
Part 32	Adoption	
	32.1	Effect and application of these Standards
	32.2	Manufacture to be completed before target dates
Part 33	Compliance	
	33.1	Date for compliance with these Standards — new conveyances, premises and infrastructure
	33.2	Date for compliance with these Standards — conveyances, premises and infrastructure in use at target dates
	33.3	Equivalent access
	33.4	Consultation about proposals for equivalent access
	33.5	Equivalent access without discrimination
	33.6	Direct assistance
	33.7	Exceptional cases — unjustifiable hardship
Part 34	Review	
	34.1	Timetable for review
Schedule 1	Target dates for compliance	
Part 1	Target date — 31 December 2007	
Part 2	Target date — 31 December 2012	
Part 3	Target date — 31 December 2017	
Part 4	Target date — 31 December 2022	
Part 5	Target date — 31 December 2032	

Appendix 5 – Tourism Forecasts

Forecast of Tourism Visitor Nights in Queensland, by broad location and reason for travel, from Tourism Research Australia.

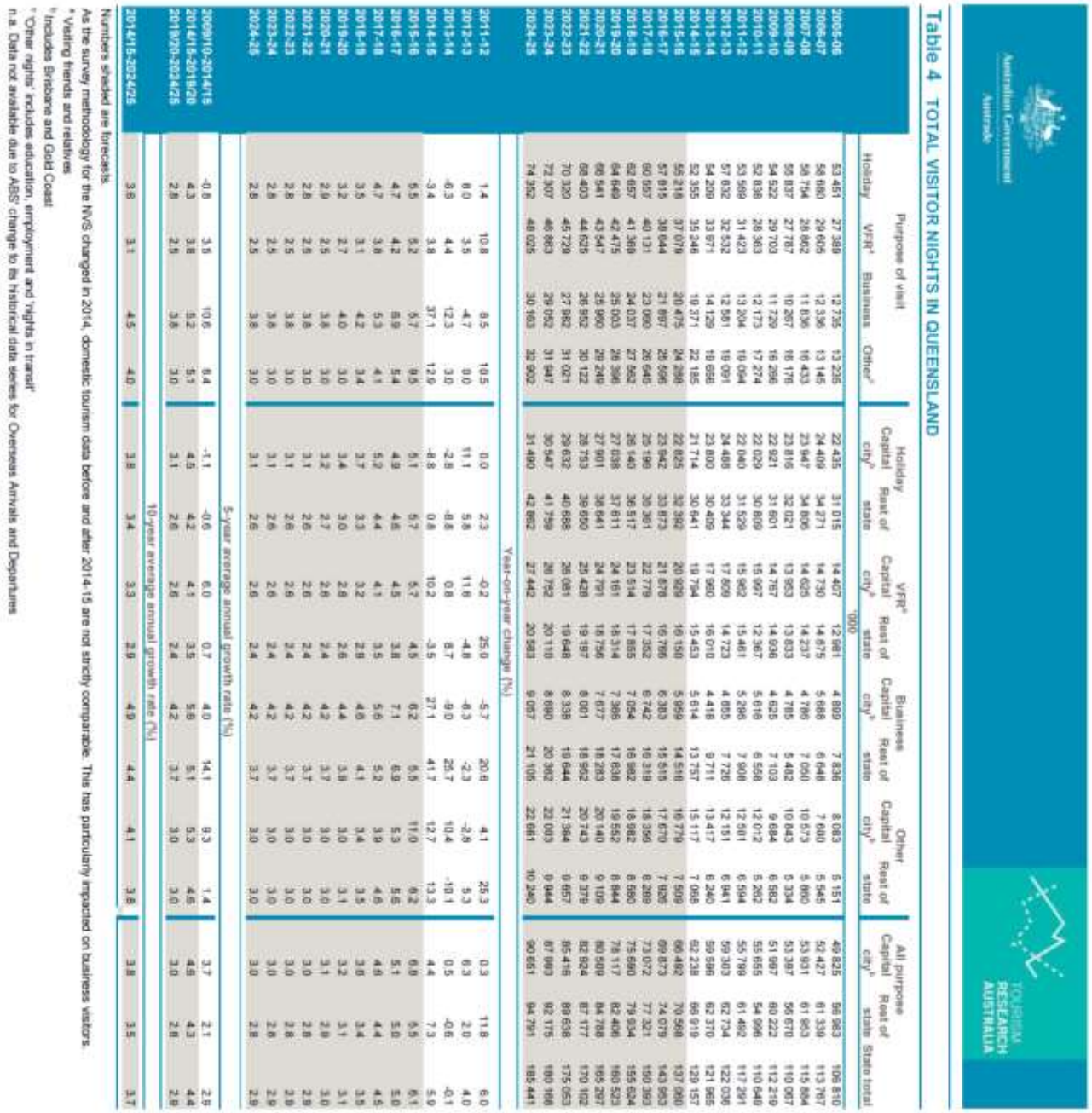


Table 4 TOTAL VISITOR NIGHTS IN QUEENSLAND

	Purpose of visit															
	Holiday	VFR[1]	Business	Other[2]	Holiday		VFR[1]		Business		Other		All purpose			
					Capital city[3]	Rest of state	Capital city[3]	Rest of state	Capital city[3]	Rest of state	Capital city[3]	Rest of state	Capital city[3]	Rest of state	State total
	'000															
2005-06	53 451	27 389	12 725	13 235	22 435	31 015	14 407	12 981	4 899	7 826	8 083	5 151	49 825	56 983	106 810	6.0
2006-07	58 680	29 605	12 336	13 145	24 469	34 271	14 730	14 875	5 686	6 648	7 600	5 545	52 427	61 339	113 767	4.0
2007-08	58 754	28 862	11 836	16 433	23 947	34 806	14 625	14 237	4 786	7 060	10 573	5 860	53 931	61 953	115 884	-0.1
2008-09	56 837	27 787	10 267	16 176	23 816	32 021	13 953	13 833	4 785	5 482	10 843	5 334	53 397	56 670	110 067	5.9
2009-10	54 522	29 703	11 729	16 266	22 921	31 601	14 767	14 936	4 625	7 103	9 684	6 582	51 997	60 222	112 219	6.1
2010-11	52 838	28 363	12 173	17 274	22 029	30 809	15 997	12 367	5 616	6 558	12 012	5 282	55 655	54 996	110 649	5.0
2011-12	53 569	31 423	13 204	19 094	22 040	31 529	15 962	15 461	5 286	7 908	12 501	6 594	55 799	61 492	117 291	6.0
2012-13	57 632	32 532	12 581	19 091	24 488	33 344	17 809	14 723	4 695	7 726	12 151	6 841	59 303	62 734	122 036	4.0
2013-14	54 209	33 971	14 129	19 656	23 800	30 409	17 960	16 010	4 416	9 711	13 417	6 240	59 586	62 370	121 965	-0.1
2014-15	52 355	35 246	19 371	22 185	21 714	30 641	19 794	15 453	5 614	13 757	15 117	7 068	62 238	66 919	129 157	5.9
2015-16	55 216	37 079	20 475	24 268	22 625	32 392	20 929	16 150	5 959	14 516	16 779	7 509	66 492	70 568	137 060	6.1
2016-17	57 815	38 044	21 897	25 596	23 942	33 873	21 878	16 766	6 383	15 515	17 670	7 826	69 873	74 079	143 953	5.0
2017-18	60 557	40 131	23 060	26 545	25 196	35 361	22 779	17 362	6 742	16 319	18 356	8 289	73 072	77 321	150 393	4.5
2018-19	62 657	41 369	24 037	27 862	26 140	36 517	23 514	17 885	7 054	16 982	18 982	8 580	75 690	79 934	155 624	3.5
2019-20	64 649	42 475	25 003	28 396	27 038	37 611	24 161	18 314	7 366	17 638	19 552	8 844	78 117	82 406	160 523	3.1
2020-21	66 541	43 547	25 960	29 249	27 901	38 641	24 791	18 796	7 677	18 283	20 140	9 109	80 509	84 788	165 297	3.0
2021-22	68 403	44 626	26 952	30 122	28 793	39 650	25 428	19 197	8 001	18 952	20 743	9 379	82 924	87 177	170 102	2.9
2022-23	70 320	45 729	27 982	31 021	29 632	40 688	26 081	19 648	8 338	19 644	21 364	9 657	85 416	89 658	175 053	2.9
2023-24	72 307	46 863	29 052	31 947	30 547	41 759	26 752	20 110	8 690	20 362	22 003	9 944	87 993	92 175	180 168	2.9
2024-25	74 352	48 025	30 163	32 902	31 490	42 862	27 442	20 583	9 057	21 105	22 661	10 240	90 651	94 791	185 441	2.9
	Year-on-year change (%)															
2011-12	1.4	10.8	8.5	10.5	0.0	2.3	-0.2	25.0	-5.7	20.6	4.1	25.3	0.3	11.8	6.0	
2012-13	8.0	3.5	-4.7	0.0	11.1	5.8	11.6	-4.8	-6.3	-2.3	-2.9	5.3	6.3	2.0	4.0	
2013-14	-6.3	4.4	12.3	3.0	-2.8	-8.8	0.8	8.7	-9.0	25.7	10.4	-10.1	0.5	-0.6	-0.1	
2014-15	-3.4	3.8	37.1	12.9	-8.8	0.8	10.2	-3.5	27.1	41.7	12.7	13.3	4.4	7.3	5.9	
2015-16	5.5	5.2	5.7	9.5	5.1	5.7	5.7	4.5	6.2	5.5	11.0	6.2	6.8	5.5	6.1	
2016-17	4.7	4.2	6.9	5.4	4.9	4.6	4.5	3.8	7.1	6.9	5.3	5.6	5.1	5.0	5.0	
2017-18	4.7	3.6	5.3	4.1	5.2	4.4	4.1	3.5	5.6	5.2	3.9	4.6	4.6	4.4	4.5	
2018-19	3.5	3.1	4.2	3.4	3.7	3.3	3.2	2.8	4.6	4.1	3.4	3.5	3.6	3.4	3.5	
2019-20	3.2	2.7	4.0	3.0	3.4	3.0	2.8	2.6	4.4	3.8	3.0	3.1	3.2	3.1	3.1	
2020-21	2.9	2.5	3.8	3.0	3.2	2.7	2.6	2.4	4.2	3.7	3.0	3.0	3.1	2.9	3.0	
2021-22	2.8	2.5	3.8	3.0	3.1	2.6	2.6	2.4	4.2	3.7	3.0	3.0	3.0	2.8	2.9	
2022-23	2.8	2.5	3.8	3.0	3.1	2.6	2.6	2.4	4.2	3.7	3.0	3.0	3.0	2.8	2.9	
2023-24	2.8	2.5	3.8	3.0	3.1	2.6	2.6	2.4	4.2	3.7	3.0	3.0	3.0	2.8	2.9	
2024-25	2.8	2.5	3.8	3.0	3.1	2.6	2.6	2.4	4.2	3.7	3.0	3.0	3.0	2.8	2.9	
	5-year average annual growth rate (%)															
2009/10-2014/15	-0.6	3.5	10.6	6.4	-1.1	-0.6	6.0	0.7	4.0	14.1	9.3	1.4	3.7	2.1	2.5	
2014/15-2019/20	4.3	3.8	5.2	5.1	4.5	4.2	4.1	3.5	5.0	5.1	5.3	4.6	4.8	4.3	4.4	
2019/20-2024/25	2.8	2.5	3.8	3.0	3.1	2.6	2.6	2.4	4.2	3.7	3.0	3.0	3.0	2.8	2.8	
	10-year average annual growth rate (%)															
2014/15-2024/25	3.6	3.1	4.5	4.0	3.8	3.4	3.3	2.9	4.9	4.4	4.1	3.8	3.8	3.5	3.7	

Numbers shaded are forecasts

As the survey methodology for the NVS changed in 2014, domestic tourism data before and after 2014-15 are not strictly comparable. This has particularly impacted on business visitors.

[1] Visiting friends and relatives

[2] Includes Brisbane and Gold Coast

[3] 'Other nights' includes education, employment and 'nights in transit'

n.a. Data not available due to ABS' change to its historical data series for Overseas Arrivals and Departures

Australian Government
Austrade

TOURISM RESEARCH AUSTRALIA

International visitor nights (15 years and over), state summary excluding external regions and other Australia

Table 10 INBOUND VISITOR NIGHTS IN AUSTRALIA BY PURPOSE OF VISIT (STOPOVER REASON) AND BY STATE/TERRITORY

	Holiday[a]	VFR[b]	Business	Other[c]	City	Regional	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total[d]
	'000														
2005-06	48 606	32 652	9 080	52 368	111 006	33 020	52 171	28 615	32 442	7 133	16 108	2 947	2 893	1 817	144 026
2006-07	58 950	34 632	10 380	54 280	122 353	35 889	57 306	31 158	36 296	7 255	17 109	3 366	3 542	2 180	150 243
2007-08	56 067	33 467	10 209	59 569	123 705	35 597	54 780	31 245	36 474	7 020	19 159	2 800	3 014	2 811	159 302
2008-09	60 782	36 428	8 526	65 984	133 993	38 735	60 716	33 944	40 746	7 187	21 018	2 729	3 439	2 952	172 731
2009-10	62 471	40 203	9 440	69 234	141 388	39 960	61 070	40 210	39 953	8 271	21 901	2 662	4 455	2 937	181 348
2010-11	59 742	45 105	10 281	74 632	149 619	40 141	66 216	41 019	41 026	8 631	22 537	2 853	4 009	3 487	189 760
2011-12	63 632	46 043	11 044	77 280	155 987	42 212	66 744	43 615	42 119	9 224	25 890	2 820	3 605	4 180	198 199
2012-13	70 942	50 913	11 273	81 063	159 399	44 791	70 180	47 052	46 728	10 446	28 047	3 226	3 736	4 774	214 160
2013-14	70 665	56 807	10 368	79 178	171 182	45 836	75 367	47 746	45 859	9 459	27 409	2 762	4 102	4 235	217 019
2014-15	74 838	60 803	10 733	86 574	187 199	47 749	79 716	54 674	49 957	8 997	28 961	3 218	4 821	4 572	234 948
2015-16	79 432	65 736	11 983	96 137	202 680	51 609	85 579	60 340	54 571	9 460	30 928	3 434	5 162	4 915	254 389
2016-17	84 782	70 388	11 980	104 572	216 185	55 158	91 234	64 322	57 996	10 246	33 139	3 661	5 520	5 234	271 323
2017-18	90 176	74 677	12 059	109 693	228 009	58 596	96 023	67 685	61 352	11 003	35 289	3 871	5 829	5 552	286 604
2018-19	94 727	78 210	12 460	114 269	238 283	61 463	100 221	70 737	63 936	11 702	37 117	4 073	6 108	5 853	299 716
2019-20	99 230	81 401	12 868	118 653	248 045	64 128	104 356	73 663	66 225	12 370	38 766	4 269	6 373	6 149	312 173
2020-21	103 737	84 614	13 280	123 171	256 038	66 764	108 557	76 671	68 564	13 058	40 309	4 468	6 635	6 449	324 802
2021-22	108 249	87 844	13 674	127 819	266 186	69 416	112 747	79 757	70 830	13 775	42 049	4 675	6 904	6 749	337 580
2022-23	112 955	91 189	14 077	132 657	276 699	72 179	117 100	82 972	73 377	14 530	43 764	4 891	7 184	7 059	350 878
2023-24	117 908	94 660	14 491	137 695	289 693	75 062	121 643	86 330	75 921	15 329	45 559	5 118	7 476	7 383	364 756
2024-25	123 074	98 247	14 917	142 949	301 127	78 061	126 359	89 830	78 552	16 171	47 419	5 365	7 780	7 723	379 186
	Year-on-year change (%)														
2011-12	6.8	2.1	7.4	3.5	4.3	5.2	0.6	6.3	2.7	6.9	14.9	-0.4	-10.1	19.9	4.4
2012-13	11.1	10.6	2.1	4.9	8.6	6.1	5.1	7.9	10.9	13.2	8.3	14.4	3.7	14.2	8.1
2013-14	-0.4	11.6	-8.0	-2.3	1.1	2.3	7.4	1.5	-1.9	-9.4	-2.0	-14.7	9.7	-11.3	1.3
2014-15	5.9	7.0	3.5	11.9	9.4	4.2	5.8	14.5	9.0	-4.9	5.4	16.9	17.5	8.0	8.3
2015-16	6.1	8.1	3.3	10.8	8.4	7.9	7.4	10.4	9.2	5.1	6.7	6.7	7.1	7.5	8.3
2016-17	6.7	7.1	4.5	6.6	6.5	7.1	6.6	6.6	6.2	9.3	7.1	6.6	6.9	6.5	6.7
2017-18	6.4	6.1	4.1	4.9	5.5	6.2	5.2	5.2	5.8	7.4	6.5	5.7	5.6	6.1	5.6
2018-19	5.0	4.7	3.6	4.2	4.5	4.9	4.4	4.5	4.2	6.4	5.2	5.2	4.8	5.4	4.6
2019-20	4.8	4.1	3.2	3.8	4.1	4.3	4.1	4.1	3.6	5.7	4.4	4.8	4.3	5.1	4.2
2020-21	4.6	3.9	3.0	3.8	4.0	4.1	4.0	4.1	3.5	5.6	4.2	4.6	4.1	4.9	4.0
2021-22	4.3	3.8	3.0	3.8	3.9	4.0	3.9	4.0	3.5	5.5	4.1	4.6	4.1	4.6	3.9
2022-23	4.3	3.8	2.9	3.8	3.9	4.0	3.9	4.0	3.5	5.5	4.1	4.6	4.1	4.6	3.9
2023-24	4.4	3.8	2.9	3.8	3.9	4.0	3.9	4.0	3.5	5.5	4.1	4.6	4.1	4.6	4.0
2024-25	4.4	3.8	2.9	3.8	3.9	4.0	3.9	4.1	3.5	5.5	4.1	4.6	4.1	4.6	4.0
	5-year average annual growth rate (%)														
2009/10-2014/15	3.7	8.6	2.8	5.1	5.5	3.6	5.5	6.3	4.6	1.7	5.7	4.6	1.6	9.5	5.3
2014/15-2019/20	5.8	6.0	3.7	6.0	5.8	6.1	5.5	6.1	6.8	6.6	6.0	5.8	5.7	6.1	5.8
2019/20-2024/25	4.4	3.8	3.0	3.8	4.0	4.0	3.9	4.0	3.5	5.5	4.1	4.6	4.1	4.7	4.0
	10-year average annual growth rate (%)														
2014/15-2024/25	5.1	4.9	3.3	4.9	4.9	5.0	4.7	5.1	4.6	6.0	5.0	5.2	4.9	5.4	4.9

Numbers shaded are forecasts

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Table 13 INBOUND VISITOR NIGHTS IN QUEENSLAND

	Purpose of visit				Holiday		VFR[b]		Business		Other		All purpose		State total
	Holiday[a]	VFR[b]	Business	Other[c]	Capital city[d]	Rest of state	Capital city[d]	Rest of state	Capital city[d]	Rest of state	Capital city[d]	Rest of state	Capital city[d]	Rest of state	
	'000														
2005-06	18 284	8 193	1 284	8 671	6 827	9 457	4 325	1 868	859	395	6 135	2 535	18 177	14 265	32 442
2006-07	19 570	6 929	1 250	8 548	6 969	10 601	4 600	2 329	855	395	5 901	2 645	20 325	15 970	36 296
2007-08	18 498	6 960	1 642	11 775	6 328	10 169	4 456	2 102	1 050	592	9 261	2 514	23 097	15 377	38 474
2008-09	20 206	7 196	1 042	12 302	6 848	10 558	4 908	2 288	723	319	8 977	3 325	24 256	16 490	40 746
2009-10	19 222	7 770	1 162	11 800	6 123	10 098	5 461	2 309	823	339	8 548	3 252	23 955	15 998	39 953
2010-11	19 128	8 471	1 370	13 056	6 632	9 496	6 044	2 427	1 001	369	10 086	2 960	25 744	15 282	41 026
2011-12	18 617	8 219	1 638	13 656	9 204	9 413	5 976	2 243	1 078	550	10 480	3 177	26 736	15 383	42 119
2012-13	20 283	10 128	1 642	14 675	9 839	10 444	7 306	2 762	1 201	441	10 740	3 935	29 146	17 582	46 728
2013-14	19 690	9 863	1 245	15 061	9 841	9 849	7 180	2 892	859	387	10 918	4 543	28 798	17 061	45 859
2014-15	20 535	10 960	1 367	17 105	9 945	10 590	8 010	2 951	987	380	12 801	4 304	31 742	18 225	49 967
2015-16	22 207	11 979	1 422	18 963	10 596	11 612	8 782	3 217	1 035	387	14 346	4 618	34 737	19 833	54 571
2016-17	23 662	12 770	1 478	20 967	11 263	12 368	9 340	3 420	1 078	402	15 139	4 669	36 826	21 140	57 966
2017-18	25 367	13 613	1 530	20 942	12 114	13 253	9 603	3 610	1 115	416	15 737	5 205	38 868	22 484	61 352
2018-19	26 521	14 075	1 581	21 729	12 683	13 838	10 324	3 760	1 152	429	16 297	5 432	40 457	23 449	63 906
2019-20	27 508	14 540	1 627	22 460	13 217	14 361	10 676	3 864	1 186	441	16 813	5 647	41 802	24 333	66 225
2020-21	28 660	15 002	1 672	23 231	13 746	14 914	11 026	3 978	1 219	452	17 356	5 875	43 347	25 217	68 564
2021-22	29 707	15 478	1 717	24 009	14 269	15 439	11 387	4 091	1 253	464	17 917	6 111	44 825	26 105	70 930
2022-23	30 792	15 969	1 762	24 854	14 811	15 981	11 759	4 210	1 287	475	18 497	6 357	46 354	27 023	73 377
2023-24	31 909	16 476	1 809	25 707	15 381	16 547	12 144	4 331	1 322	487	19 096	6 612	47 942	27 978	75 921
2024-25	33 106	16 999	1 858	26 589	15 972	17 134	12 542	4 457	1 359	500	19 712	6 877	49 583	28 969	78 552
	Year-on-year change (%)														
2011-12	2.7	-3.0	18.7	4.6	5.6	-0.9	-1.1	-7.6	7.5	49.1	4.1	6.2	3.9	0.7	2.7
2012-13	8.9	23.2	1.0	7.5	6.9	11.0	23.3	23.1	11.9	-19.8	2.5	23.9	9.0	14.3	10.9
2013-14	-2.9	-2.6	-24.2	2.6	0.0	-5.7	-2.5	-2.9	-28.6	-12.3	1.7	5.3	-1.2	-3.0	-1.9
2014-15	4.3	11.1	9.8	13.6	1.1	7.5	11.5	10.0	15.0	-1.8	17.2	3.9	10.2	6.8	9.0
2015-16	8.1	9.3	4.1	10.9	6.5	9.6	9.4	9.0	4.9	1.8	12.1	7.3	9.4	8.8	9.2
2016-17	6.5	6.6	3.9	6.6	6.3	6.7	6.7	6.3	4.0	3.8	5.6	6.8	6.0	6.6	6.2
2017-18	7.3	5.8	3.5	4.4	7.6	7.0	6.9	5.6	3.6	3.4	4.0	5.6	5.5	6.4	5.8
2018-19	4.6	4.2	3.3	3.8	4.7	4.4	4.3	3.8	3.3	3.2	3.6	4.4	4.1	4.3	4.2
2019-20	4.1	3.3	2.9	3.4	4.2	3.9	3.4	3.0	3.0	2.8	3.2	4.0	3.5	3.8	3.6
2020-21	3.8	3.2	2.8	3.4	4.0	3.7	3.3	2.9	2.8	2.6	3.2	4.0	3.5	3.6	3.6
2021-22	3.7	3.2	2.7	3.4	3.8	3.5	3.3	2.8	2.7	2.6	3.2	4.0	3.4	3.5	3.5
2022-23	3.7	3.2	2.7	3.4	3.8	3.5	3.3	2.9	2.7	2.5	3.2	4.0	3.4	3.5	3.5
2023-24	3.7	3.2	2.7	3.4	3.8	3.5	3.3	2.9	2.7	2.5	3.2	4.0	3.4	3.5	3.5
2024-25	3.7	3.2	2.7	3.4	3.8	3.5	3.3	2.9	2.7	2.5	3.2	4.0	3.4	3.5	3.5
	5-year average annual growth rate (%)														
2009/10-2014/15	1.3	7.1	3.3	7.7	1.7	1.0	6.0	5.0	3.7	2.3	8.4	5.8	5.8	2.5	4.6
2014/15-2019/20	6.1	5.8	3.5	5.6	5.8	6.3	5.9	5.5	3.8	3.0	5.6	5.6	5.7	6.0	5.8
2019/20-2024/25	3.7	3.2	2.7	3.4	3.9	3.6	3.3	2.9	2.7	2.6	3.2	4.0	3.4	3.5	3.6
	10-year average annual growth rate (%)														
2014/15-2024/25	4.9	4.5	3.1	4.5	4.9	4.9	4.6	4.2	3.2	2.8	4.4	4.8	4.6	4.7	4.6

Numbers shaded are forecasts

[a] 'Holiday' includes participated in or watched an organised sporting event and/or experienced Indigenous culture and/or attended a specific leisure event

[b] 'Visiting friends and relatives'

[c] 'Other nights' includes education, employment and 'nights in transit'

[d] Includes Brisbane and Gold Coast

n.a. Data not available due to ABS' change to its historical data series for Overseas Arrivals and Departures

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Domestic visitor nights - 15 years and up, state summary excluding external regions and other Australia

Table 19 DOMESTIC VISITOR NIGHTS

	Holiday	VFR[b]	Business	Other[c]	City	Regional	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total[d]
							'000								
2004-05	133 463	66 910	40 464	19 805	103 976	185 668	87 138	52 252	79 261	19 655	30 837	8 623	6 520	5 159	289 645
2005-06	131 742	68 869	41 357	18 408	106 869	174 526	83 911	52 999	74 368	19 456	28 295	9 445	6 378	5 584	280 396
2006-07	140 449	69 318	43 517	15 850	106 919	182 214	85 028	53 019	77 471	18 895	31 635	9 562	7 575	5 949	289 134
2007-08	141 052	66 582	42 157	15 699	103 379	182 108	83 500	53 357	77 410	19 061	30 809	9 386	6 697	5 272	285 492
2008-09	130 722	61 362	37 261	14 020	98 715	164 652	78 670	50 490	69 321	18 452	26 373	8 363	6 678	5 019	263 366
2009-10	129 766	60 882	37 988	15 626	96 892	167 568	78 033	51 664	72 266	18 524	22 685	8 841	6 497	5 561	264 261
2010-11	130 229	79 687	40 534	15 785	98 047	168 190	82 833	52 114	69 623	18 529	24 810	7 815	5 727	4 683	266 234
2011-12	128 440	88 808	43 140	17 669	100 054	178 294	82 849	54 129	75 172	18 826	27 247	8 774	6 302	5 049	278 348
2012-13	135 066	89 159	45 612	16 219	103 713	182 343	84 499	56 121	75 308	18 961	29 975	9 001	5 956	6 233	286 054
2013-14	132 310	96 148	49 428	18 093	107 130	187 851	86 746	59 961	76 106	19 911	33 115	8 692	5 238	5 209	294 978
2014-15	129 005	98 726	55 646	19 971	111 867	201 470	89 715	62 174	79 190	21 009	37 649	9 879	7 440	6 291	313 347
2015-16	132 230	101 764	59 471	20 727	115 919	208 294	92 861	64 006	82 489	21 568	38 977	10 210	7 728	6 525	324 213
2016-17	135 946	104 667	74 106	21 383	120 284	216 017	96 330	66 091	85 967	22 235	40 382	10 541	8 011	6 765	336 302
2017-18	139 344	107 593	78 286	21 632	124 293	222 863	99 461	68 043	89 041	22 865	41 618	10 857	8 274	6 968	347 156
2018-19	142 549	110 128	81 808	22 329	127 858	228 928	102 244	69 713	91 718	23 451	42 874	11 142	8 517	7 157	356 815
2019-20	145 671	112 596	85 326	22 598	131 306	234 795	104 829	71 302	94 298	24 023	44 150	11 419	8 748	7 335	366 193
2020-21	148 730	114 968	88 824	22 800	134 825	240 527	107 434	73 094	96 733	24 575	45 336	11 696	8 973	7 512	375 354
2021-22	151 675	117 360	92 366	22 979	138 220	246 180	109 958	74 782	99 171	25 118	46 510	11 972	9 196	7 691	384 400
2022-23	154 754	119 766	96 091	23 153	141 719	252 045	112 884	76 550	101 676	25 677	47 719	12 259	9 426	7 873	393 764
2023-24	157 896	122 221	99 944	23 324	145 312	258 074	115 302	78 547	104 248	26 249	48 963	12 553	9 664	8 060	403 385
2024-25	161 101	124 727	103 952	23 493	149 009	264 264	118 098	80 195	106 890	26 834	50 244	12 854	9 908	8 253	413 273
							Year-on-year change (%)								
2011-12	-1.4	11.4	6.4	13.8	2.0	6.0	-0.1	3.9	8.0	1.6	9.8	12.3	10.0	7.8	4.6
2012-13	5.2	0.4	5.7	-9.7	3.7	2.3	2.0	3.7	0.2	0.7	10.0	2.6	-5.5	23.5	2.8
2013-14	-2.0	6.7	8.4	11.6	3.3	3.0	2.7	6.8	1.1	5.0	10.5	-3.4	-12.1	-16.4	3.1
2014-15	-2.5	3.8	32.8	10.4	4.4	7.3	3.4	3.7	4.1	5.5	13.7	13.7	42.0	20.8	6.2
2015-16	2.5	3.1	6.8	3.8	3.6	3.4	3.3	3.0	4.2	2.7	3.5	3.3	3.9	3.7	3.5
2016-17	2.8	3.0	6.7	3.2	3.8	3.7	4.0	3.2	4.2	3.1	3.5	3.3	3.7	3.5	3.7
2017-18	2.5	2.6	5.6	2.6	3.3	3.2	3.3	3.0	3.6	2.8	3.1	3.0	3.3	3.2	3.2
2018-19	2.3	2.4	4.5	1.8	2.9	2.7	2.8	2.5	3.0	2.6	3.0	2.6	2.9	2.7	2.8
2019-20	2.2	2.2	4.3	1.2	2.7	2.6	2.5	2.4	2.8	2.4	3.0	2.5	2.7	2.5	2.6
2020-21	2.1	2.1	4.1	0.9	2.6	2.4	2.5	2.4	2.6	2.3	2.7	2.4	2.6	2.4	2.5
2021-22	2.0	2.1	4.0	0.8	2.5	2.4	2.3	2.3	2.5	2.2	2.6	2.4	2.5	2.4	2.4
2022-23	2.0	2.1	4.0	0.8	2.5	2.4	2.3	2.4	2.5	2.2	2.6	2.4	2.5	2.4	2.4
2023-24	2.0	2.1	4.0	0.7	2.5	2.4	2.4	2.3	2.5	2.2	2.6	2.4	2.5	2.4	2.4
2024-25	2.0	2.1	4.0	0.7	2.5	2.4	2.4	2.4	2.5	2.2	2.6	2.4	2.5	2.4	2.5
							5-year average annual growth rate (%)								
2004/05-2009/10	-0.6	-3.4	-1.3	-4.8	-1.4	-2.0	-2.2	-0.1	-1.8	-1.2	-6.0	0.0	-0.1	1.5	-1.8
2009/10-2014/15	-0.1	4.1	11.6	5.0	3.0	3.8	2.8	3.7	1.8	2.5	10.7	2.2	2.7	2.5	3.5
2014/15-2019/20	2.5	2.7	5.4	2.5	3.3	3.1	3.2	2.8	3.6	2.7	3.2	2.9	3.3	3.2	3.2
2019/20-2024/25	2.0	2.1	4.0	0.8	2.5	2.4	2.4	2.4	2.5	2.2	2.6	2.4	2.5	2.4	2.4
							10-year average annual growth rate (%)								
2004/05-2014/15	-0.3	0.3	5.0	0.1	0.7	0.8	0.3	1.8	0.0	0.7	2.0	1.1	1.3	2.0	0.8
2014/15-2024/25	2.2	2.4	4.7	1.6	2.9	2.7	2.8	2.6	3.0	2.5	2.9	2.7	2.9	2.8	2.8

Numbers shaded are forecasts.

As the survey methodology for the NVS changed in 2014, domestic tourism data before and after 2014-15 are not strictly comparable. This has particularly impacted on business visitors.

[a] 'Visiting friends and relatives'.

[c] 'Other nights' includes education, employment, 'nights in transit' and purpose of visit not asked.

[d] Total excludes offshore locations.

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Table 22 DOMESTIC VISITOR NIGHTS IN QUEENSLAND

	Purpose of visit																					
	Holiday	VFR[b]	Business	Other[c]	Holiday Capital city[d]	Holiday Rest of state	VFR[b] Capital city[d]	VFR[b] Rest of state	Business Capital city[d]	Business Rest of state	Other Capital city[d]	Other Rest of state	All purpose Capital city[d]	All purpose Rest of state	State total
					'000										
2004-05	39 457	24 712	9 727	5 366	16 969	22 488	11 155	13 567	3 774	5 953	1 778	3 567	33 666	45 565	79 231
2005-06	37 157	21 196	11 451	4 564	15 608	21 548	10 082	11 113	4 010	7 441	1 948	2 616	31 848	42 718	74 566
2006-07	39 110	22 676	11 066	4 599	15 440	23 670	10 130	12 546	4 633	6 253	1 699	2 900	32 102	45 369	77 471
2007-08	40 256	22 302	10 194	4 658	15 619	24 637	10 167	12 135	3 738	6 458	1 312	3 346	30 834	46 576	77 410
2008-09	36 631	20 591	9 225	3 874	14 168	21 463	9 045	11 545	4 062	5 163	1 866	2 009	29 141	40 180	69 321
2009-10	35 300	21 933	10 567	4 466	13 706	21 503	9 306	12 627	3 802	6 764	1 136	3 330	28 042	44 224	72 266
2010-11	34 710	19 892	10 803	4 218	13 397	21 313	9 863	9 940	4 615	6 189	1 946	2 272	29 811	39 714	69 523
2011-12	34 952	23 204	11 578	5 438	12 836	22 116	9 986	13 218	4 220	7 358	2 021	3 417	29 063	46 109	75 172
2012-13	37 549	22 404	10 939	4 416	14 649	22 900	10 443	11 961	3 654	7 285	1 411	3 006	30 157	45 152	75 308
2013-14	34 519	24 108	12 884	4 506	13 959	20 560	10 780	13 328	3 560	9 324	2 499	2 097	30 708	45 309	76 106
2014-15	31 820	24 286	18 004	5 080	11 769	20 051	11 784	12 502	4 627	13 377	2 316	2 784	30 496	48 694	79 190
2015-16	33 011	23 100	19 063	5 326	12 290	20 781	12 167	12 934	4 824	14 129	2 433	2 891	31 764	50 735	82 499
2016-17	34 164	25 674	20 419	5 629	12 679	21 495	12 529	13 345	5 307	15 113	2 533	2 906	33 047	52 939	85 987
2017-18	35 190	26 618	21 530	5 700	13 062	22 106	12 876	13 742	5 627	15 903	2 619	3 084	34 204	54 836	89 041
2018-19	36 135	27 294	22 456	5 833	13 456	22 679	13 189	14 105	5 903	16 564	2 685	3 148	35 233	56 485	91 718
2019-20	37 051	27 935	23 377	5 936	13 821	23 230	13 485	14 450	6 180	17 197	2 739	3 197	36 225	58 073	94 298
2020-21	37 881	28 545	24 288	6 017	14 155	23 727	13 765	14 780	6 458	17 831	2 784	3 234	37 162	59 571	96 733
2021-22	38 686	29 147	25 206	6 093	14 464	24 212	14 041	15 106	6 748	18 488	2 826	3 267	38 099	61 073	99 171
2022-23	39 528	29 760	26 220	6 168	14 821	24 707	14 322	15 439	7 051	19 169	2 867	3 300	39 062	62 614	101 675
2023-24	40 378	30 387	27 243	6 241	15 186	25 212	14 608	15 779	7 368	19 874	2 909	3 332	40 051	64 197	104 248
2024-25	41 246	31 026	28 305	6 312	15 516	25 726	14 900	16 126	7 700	20 605	2 949	3 363	41 068	65 822	106 890
	Year-on-year change (%)														
2011-12	0.7	16.6	7.2	28.9	-4.2	3.8	0.3	33.0	-8.6	18.9	-3.9	50.4	-2.8	16.1	8.0
2012-13	7.4	-3.4	-5.5	-18.8	14.1	3.5	4.6	-9.5	-13.4	-1.0	-30.2	-12.0	3.8	-2.1	0.2
2013-14	-8.1	7.6	17.8	4.1	-4.7	-30.2	3.2	11.4	-2.6	28.0	77.1	-30.2	2.1	0.3	1.1
2014-15	-7.8	0.7	39.7	10.6	-15.7	-2.5	-6.2	30.0	43.5	-7.3	318	-1.0	4.1	7.5	4.1
2015-16	3.7	3.4	5.8	4.8	3.9	3.6	3.5	6.4	5.6	5.1	4.6	4.1	4.2	4.3	4.2
2016-17	3.5	3.1	7.2	3.8	3.7	3.4	3.0	3.2	7.0	7.0	5.2	3.4	2.9	4.1	3.6	4.2
2017-18	3.0	2.9	5.4	3.1	3.2	2.9	2.8	3.0	6.0	6.0	5.2	3.4	2.9	3.5	3.6	3.6
2018-19	2.7	2.5	4.3	2.3	2.9	2.6	2.4	2.6	4.9	4.1	2.5	2.1	2.0	3.0	3.0	3.0
2019-20	2.5	2.3	4.1	1.8	2.7	2.4	2.2	2.4	4.7	3.9	2.0	1.6	2.8	2.8	2.8	2.8
2020-21	2.2	2.2	3.9	1.4	2.4	2.1	2.1	2.3	4.5	3.7	1.6	1.2	2.6	2.6	2.6	2.6
2021-22	2.2	2.1	3.9	1.3	2.3	2.0	2.0	2.2	4.5	3.7	1.5	1.0	2.5	2.5	2.5	2.5
2022-23	2.2	2.1	3.9	1.2	2.3	2.0	2.0	2.2	4.5	3.7	1.5	1.0	2.5	2.5	2.5	2.5
2023-24	2.2	2.1	3.9	1.2	2.3	2.0	2.0	2.2	4.5	3.7	1.4	1.0	2.5	2.5	2.5	2.5
2024-25	2.2	2.1	3.9	1.2	2.3	2.0	2.0	2.2	4.5	3.7	1.4	0.9	2.5	2.5	2.5	2.5
	5-year average annual growth rate (%)														
2004-05–2009-10	-2.2	-2.4	1.7	-3.6	-4.1	-0.9	-3.6	-1.4	0.1	2.6	-8.6	-1.5	-3.6	-0.6	-1.8
2009-10–2014-15	-2.1	2.1	11.2	2.6	-3.1	-1.4	4.8	-0.2	4.0	14.6	15.3	-3.7	1.7	1.9	1.8
2014-15–2019-20	3.1	2.8	5.4	3.2	3.3	3.0	2.7	2.9	6.0	5.2	3.4	3.0	3.5	3.6	3.6
2019-20–2024-25	2.2	2.1	3.9	1.2	2.3	2.1	2.0	2.2	4.5	3.7	1.5	1.0	2.5	2.5	2.5
	10-year average annual growth rate (%)														
2004-05–2014-15	-2.1	-0.2	6.4	-0.5	-3.6	-1.1	0.6	-0.8	2.1	8.4	2.7	-2.5	-1.0	0.7	0.0
2014-15–2024-25	2.6	2.5	4.6	2.2	2.8	2.5	2.4	2.6	5.2	4.4	2.4	2.0	3.0	3.1	3.0

Numbers shaded are forecasts.

As the survey methodology for the NVS changed in 2014, domestic tourism data before and after 2014-15 are not strictly comparable. This has particularly impacted on business visitors.

[b] Visiting friends and relatives

[c] 'Other nights' includes education, employment, 'nights in transit' and purpose of visit not asked

[d] Includes Brisbane and Gold Coast

Appendix 6 – BITRE Airport Traffic Data

Airport passenger throughput data for major Queensland Airports, collated by the Bureau of Infrastructure, Transport and Regional Economics.

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
BRISBANE	1985-86	1,475,837	1,453,594	270,970	256,371	1,746,807	1,709,965	3,456,772
BRISBANE	1986-87	1,565,805	1,537,227	317,291	308,006	1,883,096	1,845,233	3,728,329
BRISBANE	1987-88	1,793,200	1,737,473	413,724	380,834	2,206,924	2,118,307	4,325,231
BRISBANE	1988-89	1,931,813	1,928,589	507,298	466,710	2,439,111	2,395,299	4,834,410
BRISBANE	1989-90	1,454,607	1,458,604	538,811	480,478	1,993,418	1,939,082	3,932,500
BRISBANE	1990-91	2,078,547	2,068,845	572,134	525,989	2,650,681	2,594,834	5,245,515
BRISBANE	1991-92	2,699,067	2,670,728	653,034	621,014	3,352,101	3,291,742	6,643,843
BRISBANE	1992-93	2,756,000	2,715,115	741,456	687,404	3,497,456	3,402,519	6,899,975
BRISBANE	1993-94	2,946,961	2,947,063	816,018	783,068	3,762,979	3,730,131	7,493,110
BRISBANE	1994-95	3,293,247	3,377,346	990,549	847,474	4,283,796	4,224,820	8,508,616
BRISBANE	1995-96	3,538,131	3,632,386	1,127,180	938,189	4,665,311	4,570,575	9,235,886
BRISBANE	1996-97	3,675,280	3,754,743	1,228,188	1,024,667	4,903,468	4,779,410	9,682,878
BRISBANE	1997-98	3,690,952	3,776,436	1,238,910	1,031,179	4,929,862	4,807,615	9,737,477
BRISBANE	1998-99	3,740,025	3,804,095	1,219,427	1,070,792	4,959,452	4,874,887	9,834,339
BRISBANE	1999-00	4,039,425	4,064,820	1,293,479	1,136,540	5,332,904	5,201,360	10,534,264
BRISBANE	2000-01	4,948,279	4,979,622	1,351,459	1,187,233	6,299,738	6,166,855	12,466,593
BRISBANE	2001-02	4,622,782	4,674,388	1,290,537	1,185,974	5,913,319	5,860,362	11,773,681
BRISBANE	2002-03	4,687,254	4,711,024	1,258,863	1,184,055	5,946,117	5,895,079	11,841,196
BRISBANE	2003-04	5,436,996	5,430,638	1,481,043	1,431,401	6,918,039	6,862,039	13,780,078
BRISBANE	2004-05	5,949,120	5,925,053	1,764,467	1,719,390	7,713,587	7,644,443	15,358,030
BRISBANE	2005-06	6,196,599	6,172,433	1,844,375	1,802,516	8,040,974	7,974,949	16,015,923
BRISBANE	2006-07	6,749,618	6,744,285	1,965,894	1,920,012	8,715,512	8,664,297	17,379,809
BRISBANE	2007-08	7,160,858	7,152,037	2,006,766	1,978,069	9,167,624	9,130,106	18,297,730
BRISBANE	2008-09	7,347,296	7,307,279	2,033,560	2,032,160	9,380,856	9,339,439	18,720,295
BRISBANE	2009-10	7,369,460	7,364,755	2,073,584	2,089,157	9,443,044	9,453,912	18,896,956
BRISBANE	2010-11	7,815,606	7,818,366	2,170,333	2,170,441	9,985,939	9,988,807	19,974,746
BRISBANE	2011-12	8,181,200	8,172,414	2,286,413	2,233,591	10,467,613	10,406,005	20,873,618
BRISBANE	2012-13	8,318,108	8,303,638	2,298,186	2,224,793	10,616,294	10,528,431	21,144,725
BRISBANE	2013-14	8,528,683	8,484,622	2,438,447	2,369,546	10,967,130	10,854,168	21,821,298
BRISBANE	2014-15	8,394,739	8,380,282	2,589,500	2,553,836	10,984,239	10,934,118	21,918,357
BUNDABERG	1985-86	43,861	44,205	0	0	43,861	44,205	88,066
BUNDABERG	1986-87	42,767	42,542	0	0	42,767	42,542	85,309
BUNDABERG	1987-88	14,619	14,312	0	0	14,619	14,312	28,931
BUNDABERG	1988-89	21,873	21,683	0	0	21,873	21,683	43,556
BUNDABERG	1989-90	19,948	20,342	0	0	19,948	20,342	40,290
BUNDABERG	1990-91	20,666	20,829	0	0	20,666	20,829	41,495
BUNDABERG	1991-92	27,765	28,818	0	0	27,765	28,818	56,583
BUNDABERG	1992-93	27,345	27,585	0	0	27,345	27,585	54,930
BUNDABERG	1993-94	30,349	30,928	0	0	30,349	30,928	61,277
BUNDABERG	1994-95	43,288	43,931	0	0	43,288	43,931	87,219
BUNDABERG	1995-96	35,337	35,798	0	0	35,337	35,798	71,135
BUNDABERG	1996-97	33,954	34,415	0	0	33,954	34,415	68,369
BUNDABERG	1997-98	34,275	34,467	0	0	34,275	34,467	68,742
BUNDABERG	1998-99	34,068	34,367	0	0	34,068	34,367	68,435

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
BUNDABERG	1999-00	39,373	39,618	0	0	39,373	39,618	78,991
BUNDABERG	2000-01	34,005	34,634	0	0	34,005	34,634	68,639
BUNDABERG	2001-02	27,142	27,209	0	0	27,142	27,209	54,351
BUNDABERG	2002-03	28,079	28,470	0	0	28,079	28,470	56,549
BUNDABERG	2003-04	33,289	33,427	0	0	33,289	33,427	66,716
BUNDABERG	2004-05	43,396	43,981	0	0	43,396	43,981	87,377
BUNDABERG	2005-06	48,472	49,804	0	0	48,472	49,804	98,276
BUNDABERG	2006-07	51,162	52,784	0	0	51,162	52,784	103,946
BUNDABERG	2007-08	57,868	58,704	0	0	57,868	58,704	116,572
BUNDABERG	2008-09	57,377	57,338	0	0	57,377	57,338	114,715
BUNDABERG	2009-10	57,640	58,249	0	0	57,640	58,249	115,889
BUNDABERG	2010-11	65,866	66,865	0	0	65,866	66,865	132,731
BUNDABERG	2011-12	62,144	62,693	0	0	62,144	62,693	124,837
BUNDABERG	2012-13	66,470	67,417	0	0	66,470	67,417	133,887
BUNDABERG	2013-14	79,478	79,734	0	0	79,478	79,734	159,212
BUNDABERG	2014-15	78,004	78,227	0	0	78,004	78,227	156,231
CAIRNS	1985-86	262,864	261,781	29,585	24,064	292,449	285,845	578,294
CAIRNS	1986-87	331,738	328,329	45,144	37,236	376,882	365,565	742,447
CAIRNS	1987-88	399,888	403,727	71,131	58,956	471,019	462,683	933,702
CAIRNS	1988-89	432,033	432,082	100,572	88,974	532,605	521,056	1,053,661
CAIRNS	1989-90	296,181	303,849	125,945	114,417	422,126	418,266	840,392
CAIRNS	1990-91	482,017	477,423	170,743	157,817	652,760	635,240	1,288,000
CAIRNS	1991-92	666,512	673,667	227,376	208,448	893,888	882,115	1,776,003
CAIRNS	1992-93	663,952	684,399	330,034	270,113	993,986	954,512	1,948,498
CAIRNS	1993-94	755,919	779,248	379,886	308,229	1,135,805	1,087,477	2,223,282
CAIRNS	1994-95	878,389	899,081	327,401	313,976	1,205,790	1,213,057	2,418,847
CAIRNS	1995-96	947,850	952,357	345,708	348,942	1,293,558	1,301,299	2,594,857
CAIRNS	1996-97	953,149	964,161	379,368	360,740	1,332,517	1,324,901	2,657,418
CAIRNS	1997-98	939,602	954,258	352,446	352,177	1,292,048	1,306,435	2,598,483
CAIRNS	1998-99	984,484	987,722	337,135	346,308	1,321,619	1,334,030	2,655,649
CAIRNS	1999-00	1,032,656	1,029,801	328,203	327,718	1,360,859	1,357,519	2,718,378
CAIRNS	2000-01	1,089,488	1,100,239	352,671	348,354	1,442,159	1,448,593	2,890,752
CAIRNS	2001-02	972,587	979,279	349,624	341,008	1,322,211	1,320,287	2,642,498
CAIRNS	2002-03	1,075,811	1,072,135	375,953	376,573	1,451,764	1,448,708	2,900,472
CAIRNS	2003-04	1,203,923	1,217,601	407,687	393,114	1,611,610	1,610,715	3,222,325
CAIRNS	2004-05	1,343,223	1,349,626	431,937	426,208	1,775,160	1,775,834	3,550,994
CAIRNS	2005-06	1,431,614	1,443,615	432,723	423,226	1,864,337	1,866,841	3,731,178
CAIRNS	2006-07	1,528,729	1,523,790	368,590	361,074	1,897,319	1,884,864	3,782,183
CAIRNS	2007-08	1,561,908	1,559,327	331,041	324,878	1,892,949	1,884,205	3,777,154
CAIRNS	2008-09	1,577,980	1,580,378	250,454	244,732	1,828,434	1,825,110	3,653,544
CAIRNS	2009-10	1,563,237	1,559,623	215,827	211,553	1,779,064	1,771,176	3,550,240
CAIRNS	2010-11	1,676,834	1,671,528	258,236	252,741	1,935,070	1,924,269	3,859,339
CAIRNS	2011-12	1,718,818	1,719,704	253,770	250,430	1,972,588	1,970,134	3,942,722
CAIRNS	2012-13	1,810,475	1,829,638	260,818	256,921	2,071,293	2,086,559	4,157,852
CAIRNS	2013-14	1,898,892	1,927,860	235,985	233,599	2,134,877	2,161,459	4,296,336
CAIRNS	2014-15	1,947,614	1,955,021	243,490	244,889	2,191,104	2,199,910	4,391,014
COOKTOWN	1985-86	1,977	2,030	0	0	1,977	2,030	4,007
COOKTOWN	1986-87	3,073	3,149	0	0	3,073	3,149	6,222
COOKTOWN	1987-88	2,321	2,254	0	0	2,321	2,254	4,575

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
COOKTOWN	1988-89	29	8	0	0	29	8	37
COOKTOWN	1989-90	11	8	0	0	11	8	19
COOKTOWN	1990-91	3,339	3,308	0	0	3,339	3,308	6,647
COOKTOWN	1991-92	5,233	5,611	0	0	5,233	5,611	10,844
COOKTOWN	1992-93	5,802	6,054	0	0	5,802	6,054	11,856
COOKTOWN	1993-94	5,248	5,540	0	0	5,248	5,540	10,788
COOKTOWN	1994-95	5,420	5,674	0	0	5,420	5,674	11,094
COOKTOWN	1995-96	7,771	8,031	0	0	7,771	8,031	15,802
COOKTOWN	1996-97	7,163	7,366	0	0	7,163	7,366	14,529
COOKTOWN	1997-98	7,300	7,580	0	0	7,300	7,580	14,880
COOKTOWN	1998-99	7,463	7,735	0	0	7,463	7,735	15,198
COOKTOWN	1999-00	7,657	7,793	0	0	7,657	7,793	15,450
COOKTOWN	2000-01	7,875	8,057	0	0	7,875	8,057	15,932
COOKTOWN	2001-02	5,207	5,004	0	0	5,207	5,004	10,211
COOKTOWN	2002-03	5,963	5,879	0	0	5,963	5,879	11,842
COOKTOWN	2003-04	6,525	6,323	0	0	6,525	6,323	12,848
COOKTOWN	2004-05	7,535	7,513	0	0	7,535	7,513	15,048
COOKTOWN	2005-06	7,876	7,996	0	0	7,876	7,996	15,872
COOKTOWN	2006-07	7,894	8,376	0	0	7,894	8,376	16,270
COOKTOWN	2007-08	8,876	9,308	0	0	8,876	9,308	18,184
COOKTOWN	2008-09	5,670	5,994	0	0	5,670	5,994	11,664
COOKTOWN	2009-10	5,617	5,771	0	0	5,617	5,771	11,388
COOKTOWN	2010-11	4,512	4,782	0	0	4,512	4,782	9,294
COOKTOWN	2011-12	4,364	4,641	0	0	4,364	4,641	9,005
COOKTOWN	2012-13	4,219	4,494	0	0	4,219	4,494	8,713
COOKTOWN	2013-14	4,633	4,930	0	0	4,633	4,930	9,563
COOKTOWN	2014-15	5,085	5,227	0	0	5,085	5,227	10,312
EMERALD	1985-86	6,824	6,729	0	0	6,824	6,729	13,553
EMERALD	1986-87	7,390	7,283	0	0	7,390	7,283	14,673
EMERALD	1987-88	4,713	4,627	0	0	4,713	4,627	9,340
EMERALD	1988-89	5,949	6,138	0	0	5,949	6,138	12,087
EMERALD	1989-90	7,350	7,329	0	0	7,350	7,329	14,679
EMERALD	1990-91	9,183	9,212	0	0	9,183	9,212	18,395
EMERALD	1991-92	15,934	15,821	0	0	15,934	15,821	31,755
EMERALD	1992-93	17,183	17,343	0	0	17,183	17,343	34,526
EMERALD	1993-94	18,258	18,109	0	0	18,258	18,109	36,367
EMERALD	1994-95	18,765	18,735	0	0	18,765	18,735	37,500
EMERALD	1995-96	18,106	17,943	0	0	18,106	17,943	36,049
EMERALD	1996-97	18,760	18,518	0	0	18,760	18,518	37,278
EMERALD	1997-98	18,397	18,503	0	0	18,397	18,503	36,900
EMERALD	1998-99	17,365	17,330	0	0	17,365	17,330	34,695
EMERALD	1999-00	19,903	19,549	0	0	19,903	19,549	39,452
EMERALD	2000-01	19,224	19,212	0	0	19,224	19,212	38,436
EMERALD	2001-02	17,221	17,253	0	0	17,221	17,253	34,474
EMERALD	2002-03	20,634	20,595	0	0	20,634	20,595	41,229
EMERALD	2003-04	23,596	24,118	0	0	23,596	24,118	47,714
EMERALD	2004-05	30,630	31,106	0	0	30,630	31,106	61,736
EMERALD	2005-06	38,903	39,748	0	0	38,903	39,748	78,651
EMERALD	2006-07	47,141	48,549	0	0	47,141	48,549	95,690

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
EMERALD	2007-08	52,558	54,200	0	0	52,558	54,200	106,758
EMERALD	2008-09	59,005	60,827	0	0	59,005	60,827	119,832
EMERALD	2009-10	61,167	62,896	0	0	61,167	62,896	124,063
EMERALD	2010-11	81,703	84,082	0	0	81,703	84,082	165,785
EMERALD	2011-12	116,490	118,270	0	0	116,490	118,270	234,760
EMERALD	2012-13	146,806	149,139	0	0	146,806	149,139	295,945
EMERALD	2013-14	131,023	132,509	0	0	131,023	132,509	263,532
EMERALD	2014-15	115,592	114,682	0	0	115,592	114,682	230,274
GLADSTONE	1985-86	32,025	33,179	0	0	32,025	33,179	65,204
GLADSTONE	1986-87	33,675	34,761	0	0	33,675	34,761	68,436
GLADSTONE	1987-88	29,220	30,748	0	0	29,220	30,748	59,968
GLADSTONE	1988-89	31,411	32,443	0	0	31,411	32,443	63,854
GLADSTONE	1989-90	28,424	29,664	0	0	28,424	29,664	58,088
GLADSTONE	1990-91	31,225	32,546	0	0	31,225	32,546	63,771
GLADSTONE	1991-92	40,892	41,965	0	0	40,892	41,965	82,857
GLADSTONE	1992-93	45,453	46,756	0	0	45,453	46,756	92,209
GLADSTONE	1993-94	46,193	47,175	0	0	46,193	47,175	93,368
GLADSTONE	1994-95	49,844	50,338	0	0	49,844	50,338	100,182
GLADSTONE	1995-96	51,978	52,401	0	0	51,978	52,401	104,379
GLADSTONE	1996-97	52,791	53,259	0	0	52,791	53,259	106,050
GLADSTONE	1997-98	51,398	51,931	0	0	51,398	51,931	103,329
GLADSTONE	1998-99	52,137	52,723	0	0	52,137	52,723	104,860
GLADSTONE	1999-00	52,543	53,366	0	0	52,543	53,366	105,909
GLADSTONE	2000-01	50,136	51,051	0	0	50,136	51,051	101,187
GLADSTONE	2001-02	51,294	51,767	0	0	51,294	51,767	103,061
GLADSTONE	2002-03	65,555	67,111	0	0	65,555	67,111	132,666
GLADSTONE	2003-04	65,240	68,269	0	0	65,240	68,269	133,509
GLADSTONE	2004-05	68,619	71,309	0	0	68,619	71,309	139,928
GLADSTONE	2005-06	79,063	80,887	0	0	79,063	80,887	159,950
GLADSTONE	2006-07	92,897	95,714	0	0	92,897	95,714	188,611
GLADSTONE	2007-08	98,840	101,771	0	0	98,840	101,771	200,611
GLADSTONE	2008-09	95,893	96,985	0	0	95,893	96,985	192,878
GLADSTONE	2009-10	88,016	89,528	0	0	88,016	89,528	177,544
GLADSTONE	2010-11	119,561	120,714	0	0	119,561	120,714	240,275
GLADSTONE	2011-12	177,247	178,639	0	0	177,247	178,639	355,886
GLADSTONE	2012-13	229,096	228,508	0	0	229,096	228,508	457,604
GLADSTONE	2013-14	249,527	251,613	0	0	249,527	251,613	501,140
GLADSTONE	2014-15	219,455	224,275	0	0	219,455	224,275	443,730
GOLD COAST	1985-86	374,898	402,900	0	0	374,898	402,900	777,798
GOLD COAST	1986-87	445,247	484,880	0	0	445,247	484,880	930,127
GOLD COAST	1987-88	529,350	590,272	0	0	529,350	590,272	1,119,622
GOLD COAST	1988-89	588,514	670,019	0	0	588,514	670,019	1,258,533
GOLD COAST	1989-90	306,991	352,074	0	0	306,991	352,074	659,065
GOLD COAST	1990-91	515,846	573,800	0	0	515,846	573,800	1,089,646
GOLD COAST	1991-92	712,403	782,527	0	0	712,403	782,527	1,494,930
GOLD COAST	1992-93	736,095	828,023	0	0	736,095	828,023	1,564,118
GOLD COAST	1993-94	812,062	899,376	0	0	812,062	899,376	1,711,438
GOLD COAST	1994-95	894,326	984,969	0	0	894,326	984,969	1,879,295
GOLD COAST	1995-96	955,644	1,037,218	0	0	955,644	1,037,218	1,992,862

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
GOLD COAST	1996-97	923,257	1,009,887	2,362	1,917	925,619	1,011,804	1,937,423
GOLD COAST	1997-98	888,878	962,297	8,136	8,329	897,014	970,626	1,867,640
GOLD COAST	1998-99	900,111	948,686	7,938	7,245	908,049	955,931	1,863,980
GOLD COAST	1999-00	950,583	987,178	11,085	10,171	961,668	997,349	1,959,017
GOLD COAST	2000-01	915,099	939,110	17,330	16,469	932,429	955,579	1,888,008
GOLD COAST	2001-02	826,192	842,979	34,022	32,811	860,214	875,790	1,736,004
GOLD COAST	2002-03	1,017,071	1,024,501	68,256	67,774	1,085,327	1,092,275	2,177,602
GOLD COAST	2003-04	1,180,736	1,185,886	68,818	68,561	1,249,554	1,254,447	2,504,001
GOLD COAST	2004-05	1,490,024	1,492,303	79,068	80,376	1,569,092	1,572,679	3,141,771
GOLD COAST	2005-06	1,653,793	1,650,733	104,097	106,398	1,757,890	1,757,131	3,515,021
GOLD COAST	2006-07	1,786,012	1,799,024	96,633	96,187	1,882,645	1,895,211	3,777,856
GOLD COAST	2007-08	2,031,867	2,030,396	131,255	129,837	2,163,122	2,160,233	4,323,355
GOLD COAST	2008-09	2,070,710	2,071,982	239,820	235,688	2,310,530	2,307,670	4,618,200
GOLD COAST	2009-10	2,231,528	2,224,685	360,343	369,591	2,591,871	2,594,276	5,186,147
GOLD COAST	2010-11	2,351,750	2,362,622	380,990	390,710	2,732,740	2,753,332	5,486,072
GOLD COAST	2011-12	2,306,971	2,294,595	358,943	366,061	2,665,914	2,660,656	5,326,570
GOLD COAST	2012-13	2,452,757	2,469,653	440,347	442,189	2,893,104	2,911,842	5,804,946
GOLD COAST	2013-14	2,446,138	2,462,393	441,521	433,789	2,887,659	2,896,182	5,783,841
GOLD COAST	2014-15	2,488,939	2,499,398	444,466	434,491	2,933,405	2,933,889	5,867,294
HAMILTON ISLAND	1985-86	27,909	28,233	0	0	27,909	28,233	56,142
HAMILTON ISLAND	1986-87	55,807	55,550	0	0	55,807	55,550	111,357
HAMILTON ISLAND	1987-88	86,419	86,749	0	0	86,419	86,749	173,168
HAMILTON ISLAND	1988-89	89,213	91,372	0	0	89,213	91,372	180,585
HAMILTON ISLAND	1989-90	58,814	61,889	0	0	58,814	61,889	120,703
HAMILTON ISLAND	1990-91	93,953	94,743	0	0	93,953	94,743	188,696
HAMILTON ISLAND	1991-92	111,502	112,945	0	0	111,502	112,945	224,447
HAMILTON ISLAND	1992-93	121,941	121,086	0	0	121,941	121,086	243,027
HAMILTON ISLAND	1993-94	142,363	141,652	0	0	142,363	141,652	284,015
HAMILTON ISLAND	1994-95	156,876	156,170	0	0	156,876	156,170	313,046
HAMILTON ISLAND	1995-96	153,791	151,496	0	0	153,791	151,496	305,287
HAMILTON ISLAND	1996-97	147,627	145,712	0	0	147,627	145,712	293,339
HAMILTON ISLAND	1997-98	149,346	148,772	0	0	149,346	148,772	298,118
HAMILTON ISLAND	1998-99	152,977	153,188	0	0	152,977	153,188	306,165
HAMILTON ISLAND	1999-00	163,660	164,314	0	0	163,660	164,314	327,974
HAMILTON ISLAND	2000-01	156,095	157,607	0	0	156,095	157,607	313,702
HAMILTON ISLAND	2001-02	123,816	124,507	0	0	123,816	124,507	248,323
HAMILTON ISLAND	2002-03	140,591	140,889	0	0	140,591	140,889	281,480
HAMILTON ISLAND	2003-04	168,575	170,403	0	0	168,575	170,403	338,978
HAMILTON ISLAND	2004-05	177,902	179,468	0	0	177,902	179,468	357,370
HAMILTON ISLAND	2005-06	214,645	217,406	0	0	214,645	217,406	432,051

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
HAMILTON ISLAND	2006-07	232,101	233,840	0	0	232,101	233,840	465,941
HAMILTON ISLAND	2007-08	231,205	232,640	0	0	231,205	232,640	463,845
HAMILTON ISLAND	2008-09	216,189	218,116	0	0	216,189	218,116	434,305
HAMILTON ISLAND	2009-10	238,109	239,950	0	0	238,109	239,950	478,059
HAMILTON ISLAND	2010-11	227,698	229,943	0	0	227,698	229,943	457,641
HAMILTON ISLAND	2011-12	226,242	226,852	0	0	226,242	226,852	453,094
HAMILTON ISLAND	2012-13	224,047	222,673	0	0	224,047	222,673	446,720
HAMILTON ISLAND	2013-14	238,867	238,445	0	0	238,867	238,445	477,312
HAMILTON ISLAND	2014-15	246,704	247,156	0	0	246,704	247,156	493,860
HERVEY BAY	1985-86	1,464	1,829	0	0	1,464	1,829	3,293
HERVEY BAY	1986-87	1,311	1,374	0	0	1,311	1,374	2,685
HERVEY BAY	1987-88	2,666	2,582	0	0	2,666	2,582	5,248
HERVEY BAY	1988-89	3,373	3,460	0	0	3,373	3,460	6,833
HERVEY BAY	1989-90	3,296	3,382	0	0	3,296	3,382	6,678
HERVEY BAY	1990-91	4,910	5,195	0	0	4,910	5,195	10,105
HERVEY BAY	1991-92	6,795	7,112	0	0	6,795	7,112	13,907
HERVEY BAY	1992-93	9,907	10,102	0	0	9,907	10,102	20,009
HERVEY BAY	1993-94	14,930	15,356	0	0	14,930	15,356	30,286
HERVEY BAY	1994-95	22,609	22,503	0	0	22,609	22,503	45,112
HERVEY BAY	1995-96	20,121	20,227	0	0	20,121	20,227	40,348
HERVEY BAY	1996-97	20,151	20,334	0	0	20,151	20,334	40,485
HERVEY BAY	1997-98	20,981	21,114	0	0	20,981	21,114	42,095
HERVEY BAY	1998-99	20,113	20,282	0	0	20,113	20,282	40,395
HERVEY BAY	1999-00	21,882	22,274	0	0	21,882	22,274	44,156
HERVEY BAY	2000-01	20,062	20,347	0	0	20,062	20,347	40,409
HERVEY BAY	2001-02	15,249	15,546	0	0	15,249	15,546	30,795
HERVEY BAY	2002-03	14,123	14,058	0	0	14,123	14,058	28,181
HERVEY BAY	2003-04	15,574	15,768	0	0	15,574	15,768	31,342
HERVEY BAY	2004-05	17,566	17,904	0	0	17,566	17,904	35,470
HERVEY BAY	2005-06	70,044	70,819	0	0	70,044	70,819	140,863
HERVEY BAY	2006-07	93,296	96,133	0	0	93,296	96,133	189,429
HERVEY BAY	2007-08	103,187	107,553	0	0	103,187	107,553	210,740
HERVEY BAY	2008-09	98,964	102,051	0	0	98,964	102,051	201,015
HERVEY BAY	2009-10	71,437	71,662	0	0	71,437	71,662	143,099
HERVEY BAY	2010-11	79,181	79,410	0	0	79,181	79,410	158,591
HERVEY BAY	2011-12	73,980	74,231	0	0	73,980	74,231	148,211
HERVEY BAY	2012-13	74,884	74,646	0	0	74,884	74,646	149,530
HERVEY BAY	2013-14	74,904	74,539	0	0	74,904	74,539	149,443
HERVEY BAY	2014-15	81,578	81,110	0	0	81,578	81,110	162,688
LONGREACH	1985-86	3,115	3,070	0	0	3,115	3,070	6,185
LONGREACH	1986-87	2,792	2,719	0	0	2,792	2,719	5,511
LONGREACH	1987-88	0	0	0	0	0	0	0
LONGREACH	1988-89	0	0	0	0	0	0	0
LONGREACH	1989-90	0	0	0	0	0	0	0
LONGREACH	1990-91	1,533	1,532	0	0	1,533	1,532	3,065

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
LONGREACH	1991-92	3,876	3,878	0	0	3,876	3,878	7,754
LONGREACH	1992-93	4,067	4,195	0	0	4,067	4,195	8,262
LONGREACH	1993-94	3,798	3,867	0	0	3,798	3,867	7,665
LONGREACH	1994-95	4,925	5,220	0	0	4,925	5,220	10,145
LONGREACH	1995-96	5,996	6,183	0	0	5,996	6,183	12,179
LONGREACH	1996-97	5,540	5,797	0	0	5,540	5,797	11,337
LONGREACH	1997-98	6,031	7,128	0	0	6,031	7,128	13,159
LONGREACH	1998-99	8,526	8,892	0	0	8,526	8,892	17,418
LONGREACH	1999-00	9,841	10,098	0	0	9,841	10,098	19,939
LONGREACH	2000-01	9,109	9,323	0	0	9,109	9,323	18,432
LONGREACH	2001-02	9,596	9,592	0	0	9,596	9,592	19,188
LONGREACH	2002-03	9,731	10,079	0	0	9,731	10,079	19,810
LONGREACH	2003-04	8,729	9,397	0	0	8,729	9,397	18,126
LONGREACH	2004-05	8,336	8,894	0	0	8,336	8,894	17,230
LONGREACH	2005-06	8,816	9,262	0	0	8,816	9,262	18,078
LONGREACH	2006-07	10,022	10,833	0	0	10,022	10,833	20,855
LONGREACH	2007-08	13,166	14,201	0	0	13,166	14,201	27,367
LONGREACH	2008-09	13,776	14,867	0	0	13,776	14,867	28,643
LONGREACH	2009-10	14,272	15,314	0	0	14,272	15,314	29,586
LONGREACH	2010-11	15,909	16,721	0	0	15,909	16,721	32,630
LONGREACH	2011-12	14,932	19,209	0	0	14,932	19,209	34,141
LONGREACH	2012-13	14,541	15,501	0	0	14,541	15,501	30,042
LONGREACH	2013-14	15,653	16,694	0	0	15,653	16,694	32,347
LONGREACH	2014-15	15,074	15,859	0	0	15,074	15,859	30,933
MACKAY	1985-86	105,627	106,032	0	0	105,627	106,032	211,659
MACKAY	1986-87	105,860	106,695	0	0	105,860	106,695	212,555
MACKAY	1987-88	98,579	99,894	0	0	98,579	99,894	198,473
MACKAY	1988-89	95,477	96,980	0	0	95,477	96,980	192,457
MACKAY	1989-90	61,808	63,913	0	0	61,808	63,913	125,721
MACKAY	1990-91	90,719	92,851	0	0	90,719	92,851	183,570
MACKAY	1991-92	99,635	101,638	0	0	99,635	101,638	201,273
MACKAY	1992-93	111,276	113,393	0	0	111,276	113,393	224,669
MACKAY	1993-94	120,858	122,570	0	0	120,858	122,570	243,428
MACKAY	1994-95	133,988	136,301	0	0	133,988	136,301	270,289
MACKAY	1995-96	144,223	145,615	0	0	144,223	145,615	289,838
MACKAY	1996-97	148,288	149,084	0	0	148,288	149,084	297,372
MACKAY	1997-98	147,389	148,401	0	0	147,389	148,401	295,790
MACKAY	1998-99	137,183	139,058	0	0	137,183	139,058	276,241
MACKAY	1999-00	137,962	139,256	0	0	137,962	139,256	277,218
MACKAY	2000-01	140,298	142,353	0	0	140,298	142,353	282,651
MACKAY	2001-02	147,632	148,500	0	0	147,632	148,500	296,132
MACKAY	2002-03	185,710	186,121	0	0	185,710	186,121	371,831
MACKAY	2003-04	222,143	220,566	0	0	222,143	220,566	442,709
MACKAY	2004-05	290,841	292,233	0	0	290,841	292,233	583,074
MACKAY	2005-06	329,545	331,087	0	0	329,545	331,087	660,632
MACKAY	2006-07	370,628	372,693	0	0	370,628	372,693	743,321
MACKAY	2007-08	418,671	418,745	0	0	418,671	418,745	837,416
MACKAY	2008-09	473,823	472,495	0	0	473,823	472,495	946,318
MACKAY	2009-10	457,563	459,675	0	0	457,563	459,675	917,238

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
MACKAY	2010-11	524,049	525,123	0	0	524,049	525,123	1,049,172
MACKAY	2011-12	561,465	564,682	0	0	561,465	564,682	1,126,147
MACKAY	2012-13	557,212	558,719	0	0	557,212	558,719	1,115,931
MACKAY	2013-14	516,490	516,698	0	0	516,490	516,698	1,033,188
MACKAY	2014-15	463,471	464,883	0	0	463,471	464,883	928,354
MORANBAH	1985-86	357	353	0	0	357	353	710
MORANBAH	1986-87	481	483	0	0	481	483	964
MORANBAH	1987-88	251	296	0	0	251	296	547
MORANBAH	1988-89	147	199	0	0	147	199	346
MORANBAH	1989-90	47	63	0	0	47	63	110
MORANBAH	1990-91	17	5	0	0	17	5	22
MORANBAH	1991-92	0	0	0	0	0	0	0
MORANBAH	1992-93	0	0	0	0	0	0	0
MORANBAH	1993-94	0	0	0	0	0	0	0
MORANBAH	1994-95	0	0	0	0	0	0	0
MORANBAH	1995-96	0	0	0	0	0	0	0
MORANBAH	1996-97	0	0	0	0	0	0	0
MORANBAH	1997-98	0	0	0	0	0	0	0
MORANBAH	1998-99	0	0	0	0	0	0	0
MORANBAH	1999-00	0	0	0	0	0	0	0
MORANBAH	2000-01	0	0	0	0	0	0	0
MORANBAH	2001-02	0	0	0	0	0	0	0
MORANBAH	2002-03	0	0	0	0	0	0	0
MORANBAH	2003-04	1,041	1,040	0	0	1,041	1,040	2,081
MORANBAH	2004-05	3,342	3,340	0	0	3,342	3,340	6,682
MORANBAH	2005-06	4,276	4,273	0	0	4,276	4,273	8,549
MORANBAH	2006-07	5,756	5,797	0	0	5,756	5,797	11,553
MORANBAH	2007-08	6,146	6,213	0	0	6,146	6,213	12,359
MORANBAH	2008-09	3,622	3,732	0	0	3,622	3,732	7,354
MORANBAH	2009-10	7,810	7,028	0	0	7,810	7,028	14,838
MORANBAH	2010-11	20,989	20,499	0	0	20,989	20,499	41,488
MORANBAH	2011-12	59,709	59,636	0	0	59,709	59,636	119,345
MORANBAH	2012-13	73,587	75,893	0	0	73,587	75,893	149,480
MORANBAH	2013-14	91,049	94,037	0	0	91,049	94,037	185,086
MORANBAH	2014-15	77,072	79,120	0	0	77,072	79,120	156,192
MOUNT ISA	1985-86	104,568	105,454	0	0	104,568	105,454	210,022
MOUNT ISA	1986-87	110,060	110,624	0	0	110,060	110,624	220,684
MOUNT ISA	1987-88	86,856	87,232	0	0	86,856	87,232	174,088
MOUNT ISA	1988-89	80,565	80,095	0	0	80,565	80,095	160,660
MOUNT ISA	1989-90	23,090	23,161	0	0	23,090	23,161	46,251
MOUNT ISA	1990-91	32,077	32,581	0	0	32,077	32,581	64,658
MOUNT ISA	1991-92	42,763	43,374	0	0	42,763	43,374	86,137
MOUNT ISA	1992-93	40,874	41,380	0	0	40,874	41,380	82,254
MOUNT ISA	1993-94	42,386	42,602	0	0	42,386	42,602	84,988
MOUNT ISA	1994-95	46,247	46,226	0	0	46,247	46,226	92,473
MOUNT ISA	1995-96	50,753	50,715	0	0	50,753	50,715	101,468
MOUNT ISA	1996-97	52,893	52,634	0	0	52,893	52,634	105,527
MOUNT ISA	1997-98	57,683	58,030	0	0	57,683	58,030	115,713
MOUNT ISA	1998-99	69,964	69,980	0	0	69,964	69,980	139,944

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
MOUNT ISA	1999-00	70,066	71,447	0	0	70,066	71,447	141,513
MOUNT ISA	2000-01	67,000	67,589	0	0	67,000	67,589	134,589
MOUNT ISA	2001-02	44,424	45,009	0	0	44,424	45,009	89,433
MOUNT ISA	2002-03	44,092	44,701	0	0	44,092	44,701	88,793
MOUNT ISA	2003-04	50,545	48,660	0	0	50,545	48,660	99,205
MOUNT ISA	2004-05	56,073	55,230	0	0	56,073	55,230	111,303
MOUNT ISA	2005-06	66,630	65,845	0	0	66,630	65,845	132,475
MOUNT ISA	2006-07	77,972	77,600	0	0	77,972	77,600	155,572
MOUNT ISA	2007-08	93,420	93,259	0	0	93,420	93,259	186,679
MOUNT ISA	2008-09	86,028	87,489	0	0	86,028	87,489	173,517
MOUNT ISA	2009-10	86,996	86,817	0	0	86,996	86,817	173,813
MOUNT ISA	2010-11	109,192	108,333	0	0	109,192	108,333	217,525
MOUNT ISA	2011-12	120,309	119,616	0	0	120,309	119,616	239,925
MOUNT ISA	2012-13	131,847	131,756	0	0	131,847	131,756	263,603
MOUNT ISA	2013-14	119,410	118,629	0	0	119,410	118,629	238,039
MOUNT ISA	2014-15	104,192	104,203	0	0	104,192	104,203	208,395
ROCKHAMPTON	1985-86	216,995	217,629	0	0	216,995	217,629	434,624
ROCKHAMPTON	1986-87	219,769	220,400	0	0	219,769	220,400	440,169
ROCKHAMPTON	1987-88	221,073	222,425	0	0	221,073	222,425	443,498
ROCKHAMPTON	1988-89	203,462	204,140	0	0	203,462	204,140	407,602
ROCKHAMPTON	1989-90	93,370	93,544	0	0	93,370	93,544	186,914
ROCKHAMPTON	1990-91	143,355	142,727	0	0	143,355	142,727	286,082
ROCKHAMPTON	1991-92	150,363	150,545	0	0	150,363	150,545	300,908
ROCKHAMPTON	1992-93	157,455	157,346	0	0	157,455	157,346	314,801
ROCKHAMPTON	1993-94	151,719	151,444	0	0	151,719	151,444	303,163
ROCKHAMPTON	1994-95	151,333	152,173	0	0	151,333	152,173	303,506
ROCKHAMPTON	1995-96	156,082	156,771	0	0	156,082	156,771	312,853
ROCKHAMPTON	1996-97	152,748	153,392	0	0	152,748	153,392	306,140
ROCKHAMPTON	1997-98	157,144	157,389	0	0	157,144	157,389	314,533
ROCKHAMPTON	1998-99	141,358	141,078	0	0	141,358	141,078	282,436
ROCKHAMPTON	1999-00	148,281	148,950	0	0	148,281	148,950	297,231
ROCKHAMPTON	2000-01	142,962	143,855	0	0	142,962	143,855	286,817
ROCKHAMPTON	2001-02	108,731	108,808	0	0	108,731	108,808	217,539
ROCKHAMPTON	2002-03	154,720	154,357	0	0	154,720	154,357	309,077
ROCKHAMPTON	2003-04	200,185	198,118	0	0	200,185	198,118	398,303
ROCKHAMPTON	2004-05	273,618	275,581	0	0	273,618	275,581	549,199
ROCKHAMPTON	2005-06	292,551	295,477	0	0	292,551	295,477	588,028
ROCKHAMPTON	2006-07	318,091	320,511	0	0	318,091	320,511	638,602
ROCKHAMPTON	2007-08	346,485	343,757	0	0	346,485	343,757	690,242
ROCKHAMPTON	2008-09	361,341	363,674	0	0	361,341	363,674	725,015
ROCKHAMPTON	2009-10	378,460	378,944	0	0	378,460	378,944	757,404
ROCKHAMPTON	2010-11	358,894	360,911	0	0	358,894	360,911	719,805
ROCKHAMPTON	2011-12	374,517	376,116	0	0	374,517	376,116	750,633
ROCKHAMPTON	2012-13	353,524	357,577	0	0	353,524	357,577	711,101
ROCKHAMPTON	2013-14	339,329	342,058	0	0	339,329	342,058	681,387
ROCKHAMPTON	2014-15	316,550	318,363	0	0	316,550	318,363	634,913
ROMA	1985-86	8,787	8,766	0	0	8,787	8,766	17,553
ROMA	1986-87	5,068	4,978	0	0	5,068	4,978	10,046
ROMA	1987-88	0	0	0	0	0	0	0

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
ROMA	1988-89	0	0	0	0	0	0	0
ROMA	1989-90	0	0	0	0	0	0	0
ROMA	1990-91	714	736	0	0	714	736	1,450
ROMA	1991-92	2,796	3,007	0	0	2,796	3,007	5,803
ROMA	1992-93	3,387	3,458	0	0	3,387	3,458	6,845
ROMA	1993-94	3,585	3,626	0	0	3,585	3,626	7,211
ROMA	1994-95	3,791	3,876	0	0	3,791	3,876	7,667
ROMA	1995-96	4,637	4,691	0	0	4,637	4,691	9,328
ROMA	1996-97	4,610	4,655	0	0	4,610	4,655	9,265
ROMA	1997-98	5,444	5,503	0	0	5,444	5,503	10,947
ROMA	1998-99	5,932	5,966	0	0	5,932	5,966	11,898
ROMA	1999-00	5,573	5,676	0	0	5,573	5,676	11,249
ROMA	2000-01	5,652	5,544	0	0	5,652	5,544	11,196
ROMA	2001-02	5,315	5,217	0	0	5,315	5,217	10,532
ROMA	2002-03	5,152	5,067	0	0	5,152	5,067	10,219
ROMA	2003-04	5,721	5,756	0	0	5,721	5,756	11,477
ROMA	2004-05	7,244	7,158	0	0	7,244	7,158	14,402
ROMA	2005-06	8,054	8,193	0	0	8,054	8,193	16,247
ROMA	2006-07	11,121	11,210	0	0	11,121	11,210	22,331
ROMA	2007-08	14,975	14,990	0	0	14,975	14,990	29,965
ROMA	2008-09	20,019	19,960	0	0	20,019	19,960	39,979
ROMA	2009-10	23,878	23,535	0	0	23,878	23,535	47,413
ROMA	2010-11	30,002	29,522	0	0	30,002	29,522	59,524
ROMA	2011-12	47,068	52,117	0	0	47,068	52,117	99,185
ROMA	2012-13	85,526	84,782	0	0	85,526	84,782	170,308
ROMA	2013-14	121,940	121,961	0	0	121,940	121,961	243,901
ROMA	2014-15	96,857	101,242	0	0	96,857	101,242	198,099
SUNSHINE COAST	1985-86	43,901	44,248	0	0	43,901	44,248	88,149
SUNSHINE COAST	1986-87	43,099	43,302	0	0	43,099	43,302	86,401
SUNSHINE COAST	1987-88	41,799	41,446	0	0	41,799	41,446	83,245
SUNSHINE COAST	1988-89	45,555	46,214	0	0	45,555	46,214	91,769
SUNSHINE COAST	1989-90	23,273	23,076	0	0	23,273	23,076	46,349
SUNSHINE COAST	1990-91	46,559	45,824	0	0	46,559	45,824	92,383
SUNSHINE COAST	1991-92	63,038	63,431	0	0	63,038	63,431	126,469
SUNSHINE COAST	1992-93	90,760	89,115	0	0	90,760	89,115	179,875
SUNSHINE COAST	1993-94	107,317	107,329	0	0	107,317	107,329	214,646
SUNSHINE COAST	1994-95	134,450	134,781	0	0	134,450	134,781	269,231
SUNSHINE COAST	1995-96	155,384	154,501	0	0	155,384	154,501	309,885
SUNSHINE COAST	1996-97	152,247	150,570	0	0	152,247	150,570	302,817
SUNSHINE COAST	1997-98	140,956	138,831	0	0	140,956	138,831	279,787
SUNSHINE COAST	1998-99	145,345	143,184	0	0	145,345	143,184	288,529
SUNSHINE COAST	1999-00	153,293	153,969	0	0	153,293	153,969	307,262
SUNSHINE	2000-01	118,945	119,036	0	0	118,945	119,036	237,981

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
COAST								
SUNSHINE COAST	2001-02	108,482	107,832	0	0	108,482	107,832	216,314
SUNSHINE COAST	2002-03	160,478	158,335	0	0	160,478	158,335	318,813
SUNSHINE COAST	2003-04	215,958	215,337	0	0	215,958	215,337	431,295
SUNSHINE COAST	2004-05	331,537	332,406	0	0	331,537	332,406	663,943
SUNSHINE COAST	2005-06	392,100	394,068	0	0	392,100	394,068	786,168
SUNSHINE COAST	2006-07	440,865	439,957	0	0	440,865	439,957	880,822
SUNSHINE COAST	2007-08	461,246	458,147	0	0	461,246	458,147	919,393
SUNSHINE COAST	2008-09	458,126	458,719	0	0	458,126	458,719	916,845
SUNSHINE COAST	2009-10	405,426	406,980	0	0	405,426	406,980	812,406
SUNSHINE COAST	2010-11	455,766	458,409	0	0	455,766	458,409	914,175
SUNSHINE COAST	2011-12	395,639	395,470	0	0	395,639	395,470	791,109
SUNSHINE COAST	2012-13	400,982	401,448	3,375	3,178	404,357	404,626	808,983
SUNSHINE COAST	2013-14	445,515	447,792	4,165	3,861	449,680	451,653	901,333
SUNSHINE COAST	2014-15	418,053	419,625	5,414	4,814	423,467	424,439	847,906
TOOWOOMBA	1985-86	4,756	4,826	0	0	4,756	4,826	9,582
TOOWOOMBA	1986-87	2,940	2,819	0	0	2,940	2,819	5,759
TOOWOOMBA	1987-88	2,745	2,453	0	0	2,745	2,453	5,198
TOOWOOMBA	1988-89	2,588	2,519	0	0	2,588	2,519	5,107
TOOWOOMBA	1989-90	334	332	0	0	334	332	666
TOOWOOMBA	1990-91	1,573	1,704	0	0	1,573	1,704	3,277
TOOWOOMBA	1991-92	3,602	3,632	0	0	3,602	3,632	7,234
TOOWOOMBA	1992-93	4,557	4,451	0	0	4,557	4,451	9,008
TOOWOOMBA	1993-94	4,530	4,599	0	0	4,530	4,599	9,129
TOOWOOMBA	1994-95	5,196	5,299	0	0	5,196	5,299	10,495
TOOWOOMBA	1995-96	5,765	5,951	0	0	5,765	5,951	11,716
TOOWOOMBA	1996-97	5,227	5,335	0	0	5,227	5,335	10,562
TOOWOOMBA	1997-98	5,042	4,930	0	0	5,042	4,930	9,972
TOOWOOMBA	1998-99	4,999	4,838	0	0	4,999	4,838	9,837
TOOWOOMBA	1999-00	6,279	6,312	0	0	6,279	6,312	12,591
TOOWOOMBA	2000-01	6,648	6,775	0	0	6,648	6,775	13,423
TOOWOOMBA	2001-02	4,839	4,737	0	0	4,839	4,737	9,576
TOOWOOMBA	2002-03	0	0	0	0	0	0	0
TOOWOOMBA	2003-04	0	0	0	0	0	0	0
TOOWOOMBA	2004-05	0	0	0	0	0	0	0
TOOWOOMBA	2005-06	0	0	0	0	0	0	0
TOOWOOMBA	2006-07	0	0	0	0	0	0	0
TOOWOOMBA	2007-08	0	0	0	0	0	0	0
TOOWOOMBA	2008-09	0	0	0	0	0	0	0
TOOWOOMBA	2009-10	0	0	0	0	0	0	0
TOOWOOMBA	2010-11	1,472	1,568	0	0	1,472	1,568	3,040
TOOWOOMBA	2011-12	1,607	1,715	0	0	1,607	1,715	3,322
TOOWOOMBA	2012-13	9,386	9,391	0	0	9,386	9,391	18,777

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
TOOWOOMBA	2013-14	9,695	9,573	0	0	9,695	9,573	19,268
TOOWOOMBA	2014-15	4,826	4,717	0	0	4,826	4,717	9,543
TOWNSVILLE	1985-86	501,001	502,587	13,524	12,637	514,525	515,224	1,029,749
TOWNSVILLE	1986-87	489,702	491,482	14,515	14,584	504,217	506,066	1,010,283
TOWNSVILLE	1987-88	491,035	493,979	11,498	10,684	502,533	504,663	1,007,196
TOWNSVILLE	1988-89	442,855	443,606	10,560	10,593	453,415	454,199	907,614
TOWNSVILLE	1989-90	217,457	217,376	10,121	10,192	227,578	227,568	455,146
TOWNSVILLE	1990-91	249,627	250,897	5,632	5,679	255,259	256,576	511,835
TOWNSVILLE	1991-92	240,290	241,489	0	0	240,290	241,489	481,779
TOWNSVILLE	1992-93	275,123	277,087	1,354	1,520	276,477	278,607	555,084
TOWNSVILLE	1993-94	253,652	255,149	2,494	3,063	256,146	258,212	514,358
TOWNSVILLE	1994-95	286,182	288,894	686	925	286,868	289,819	576,687
TOWNSVILLE	1995-96	297,359	300,756	0	0	297,359	300,756	598,115
TOWNSVILLE	1996-97	302,345	304,987	54	40	302,399	305,027	607,426
TOWNSVILLE	1997-98	313,157	314,599	52	94	313,209	314,693	627,902
TOWNSVILLE	1998-99	325,529	326,677	372	286	325,901	326,963	652,864
TOWNSVILLE	1999-00	339,700	341,938	0	0	339,700	341,938	681,638
TOWNSVILLE	2000-01	365,655	366,253	0	0	365,655	366,253	731,908
TOWNSVILLE	2001-02	346,794	348,925	68	79	346,862	349,004	695,866
TOWNSVILLE	2002-03	387,961	390,409	0	0	387,961	390,409	778,370
TOWNSVILLE	2003-04	458,642	464,747	0	0	458,642	464,747	923,389
TOWNSVILLE	2004-05	526,473	528,814	0	0	526,473	528,814	1,055,287
TOWNSVILLE	2005-06	579,690	581,600	0	0	579,690	581,600	1,161,290
TOWNSVILLE	2006-07	638,263	640,625	0	0	638,263	640,625	1,278,888
TOWNSVILLE	2007-08	682,307	683,652	0	0	682,307	683,652	1,365,959
TOWNSVILLE	2008-09	721,245	714,722	0	0	721,245	714,722	1,435,967
TOWNSVILLE	2009-10	762,994	755,375	0	0	762,994	755,375	1,518,369
TOWNSVILLE	2010-11	810,119	812,123	3,976	4,197	814,095	816,320	1,630,415
TOWNSVILLE	2011-12	810,397	813,441	1,502	1,231	811,899	814,672	1,626,571
TOWNSVILLE	2012-13	783,769	785,950	0	0	783,769	785,950	1,569,719
TOWNSVILLE	2013-14	760,898	762,014	0	0	760,898	762,014	1,522,912
TOWNSVILLE	2014-15	748,764	749,182	0	0	748,764	749,182	1,497,946
WEIPA	1985-86	18,258	18,005	0	0	18,258	18,005	36,263
WEIPA	1986-87	20,756	20,795	0	0	20,756	20,795	41,551
WEIPA	1987-88	19,271	19,159	0	0	19,271	19,159	38,430
WEIPA	1988-89	23,296	24,103	0	0	23,296	24,103	47,399
WEIPA	1989-90	4,511	4,542	0	0	4,511	4,542	9,053
WEIPA	1990-91	12,542	13,062	0	0	12,542	13,062	25,604
WEIPA	1991-92	12,022	12,286	0	0	12,022	12,286	24,308
WEIPA	1992-93	11,530	11,827	0	0	11,530	11,827	23,357
WEIPA	1993-94	12,015	12,208	0	0	12,015	12,208	24,223
WEIPA	1994-95	13,955	14,096	0	0	13,955	14,096	28,051
WEIPA	1995-96	15,272	15,538	0	0	15,272	15,538	30,810
WEIPA	1996-97	15,056	15,879	0	0	15,056	15,879	30,935
WEIPA	1997-98	15,943	15,916	0	0	15,943	15,916	31,859
WEIPA	1998-99	16,555	16,953	0	0	16,555	16,953	33,508
WEIPA	1999-00	14,860	15,132	0	0	14,860	15,132	29,992
WEIPA	2000-01	14,820	14,682	0	0	14,820	14,682	29,502
WEIPA	2001-02	14,392	14,728	0	0	14,392	14,728	29,120

AIRPORT	Year	DOMESTIC AIRLINES		INTERNATIONAL AIRLINES		TOTAL PASSENGERS		
		INBOUND	OUTBOUND	INBOUND	OUTBOUND	INBOUND	OUTBOUND	TOTAL
WEIPA	2002-03	15,645	15,782	0	0	15,645	15,782	31,427
WEIPA	2003-04	19,091	19,157	0	0	19,091	19,157	38,248
WEIPA	2004-05	21,496	21,986	0	0	21,496	21,986	43,482
WEIPA	2005-06	22,335	22,724	0	0	22,335	22,724	45,059
WEIPA	2006-07	23,475	23,827	0	0	23,475	23,827	47,302
WEIPA	2007-08	27,159	27,317	0	0	27,159	27,317	54,476
WEIPA	2008-09	29,730	30,262	0	0	29,730	30,262	59,992
WEIPA	2009-10	26,904	27,292	0	0	26,904	27,292	54,196
WEIPA	2010-11	29,384	29,504	0	0	29,384	29,504	58,888
WEIPA	2011-12	35,306	36,033	0	0	35,306	36,033	71,339
WEIPA	2012-13	33,448	34,623	0	0	33,448	34,623	68,071
WEIPA	2013-14	34,513	35,000	0	0	34,513	35,000	69,513
WEIPA	2014-15	32,828	32,786	0	0	32,828	32,786	65,614

Appendix 7 – Brisbane Airport Land Transport Profile

Profile of the land transport options at Brisbane Airport, developed by the Tourism Transport

Brisbane Airport

Brisbane is the third largest airport in Australia in terms of passenger movements and is located 15km from the Brisbane CBD. In 2008/09, 18.8 million passengers passed through the airport, or an average of 52,000 per day. Throughput is expected to increase annually by 4.9 per cent over the next 20 years to 51.2 million passengers in 2029/30, or an average of 140,000 per day[15]. Brisbane Airport currently employs more than 16,000 full time equivalents. With ongoing expansion of the airport, employees accessing the airport are forecast to increase to more than 50,000 full time equivalent workers by 2029.

Table 8
Brisbane Airport passenger movements

	2008/09	2029/30	Forecast Annual Growth Rate
Passenger Movements	18.8 million	51.2 million	4.9%
Employee Population	16,000	50,000	5.6%

Passenger Movements Source: BITRE, Employee Population Source: Brisbane Airport

Strong growth in passenger movements and employees working onsite at Brisbane Airport will place further pressure on the surrounding road network. Land transport to and from Brisbane Airport is dominated by private car travel (i.e. drop-off and pick-up, parked car and rental car) with mode share exceeding 80 per cent of journeys. Of the remaining trips to and from Brisbane Airport, taxis (8.5 per cent) and the Airtrain (5 per cent[16]) are frequently used. Brisbane Airport has projected a mode share increase in 2029 for public transport – Airtrain from 5 per cent to 8.8 per cent and bus from 1.0 per cent to 4.0 per cent. This would imply that the mode share for private vehicle declines by 11.7 per cent to 71.3 per cent in 2029.

Table 9
Brisbane Airport land transport mode share

Mode	Mode Share
Private Car - Drop-Off and Pick-Up (includes parked car)	70%
Public Transport – Airtrain	5%*
Public Transport – Bus	1.0%
Taxi	8.5%
Limo	0.5%
Rental Cars	11%
Private Coaches and Shuttles	4%
Active Transport (i.e. walking and cycling)	<0.01%

Note: Mode Share reported at 2008, *Airtrain mode share reported for airport wide movements. Estimated mode share at the terminals is 10.5 per cent

Given the expected growth in passengers and employee daily travel to Brisbane Airport, very rapid growth in public transport carriage to the airport will be required if the mode share target is to be met. Ignoring meeter and greeter travel, the number of passengers and employees on a peak day is expected to increase from around 80,000 currently to perhaps 210,000 in 2029/30. This implies that to meet the airport's targets, public transport carriage would need to increase from around 4,800 on a current peak day to around 27,000 on a peak day in 2029/30.

Brisbane Airport sees its strategic focus for land transport to offer passengers alternative modes to get to the airport.

Key short, medium and long term land transport priorities to address this strategic focus are provided in Table 10.

15 BITRE, 2010, Airport Movements through Capital City Airports to 2029-30.
16 Note: Airtrain mode share of 5 per cent is reported by Brisbane Airport Corporation.

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Table 10
Land transport planning priorities for Brisbane Airport

Time rame	Project Priority	Rationale
Short Term (projects to address existing capacity deficiencies and priorities within 3 years)	Brisbane Airport is constructing new roads to improve capacity for the drop-off and pick-up areas for private cars, taxis and land transport operators at the Domestic Terminal.	Congestion in the drop-off and pick-up area directly outside the Qantas terminal despite spare capacity towards the end of the pick-up and drop-off road outside the Virgin terminal.
	Brisbane Airport is addressing current parking demands with the construction of a new 5,200 bay multi level carpark at the domestic terminal which compliments the existing multi level parking facility bringing the total parking bays to approximately 9,000 within the precinct	Availability of parking facilities; - "Parklong": consistently close to capacity; and - "Parkshort": close to capacity on Tuesdays and Wednesdays.
	Brisbane Airport is currently planning the roll out of public transport and cycle networks to improve access to all parts of airport.	To provide alternatives to road based land transport to the airport.
Medium Term (projects expected to meet 2020 demand)	Brisbane City Council to improve capacity of external access roads in particular of Kingsford Smith Drive.	Significant congestion experienced on the key access road - Kingsford Smith Drive, particularly during peak periods.
	Translink Transit Authority in conjunction with Brisbane Transport to discuss improving the provision of public transport services through increasing bus services to the airport from areas not serviced by Airtrain, and extension of bus services to Terminals.	There are two (2) public buses servicing the airport site include the 308 and 303/304 (i.e. connects to rail at Eagle Junction Station). Route 308 does not service the airport terminals but services the Brisbane 1 Village. However, Brisbane Airport currently operate a shuttle service between the terminals and the Airport Village.
	Airport to continue the roll out of its cycle network which provide connections across the airport.	To provide alternatives to road based land transport to the airport.
Long Term (projects expected to meet 2030 demand)	State government to create additional capacity on Gateway Arterial (i.e. Nudgee to Bruce Highway) as a key access road to Brisbane Airport.	The Nudgee Interchange needs to extend to Deagon to mitigate traffic risk and congestion.
	Queensland Government to develop a third heavy rail station to service the Airport Brisbane 1 Village on the Airport Line (i.e. where the feasibility study is imminent).	Demand for ancillary services at the airport site could be facilitated by development of an additional rail station.

Other key challenges for land transport at Brisbane Airport include:

- Airtrain patronage declining since completion of the new access roads (i.e. Moreton Drive); and
- Securing free capacity for additional public transport measures which will increase a mode shift to public transport (e.g. discuss with Airtrain and QR the ability to secure additional rolling stock for rail services and discuss with Translink additional buses to service new and extended routes across airport).

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Cairns Airport

Cairns Airport is located relatively close to the CBD (7 km) and had passenger throughput of approximately 3.7 million passengers in 2008/09. Passenger movements are expected to grow at 4.2 per cent to 8.6 million passengers in 2029/30.

Table 11
Cairns Airport passenger movements and employee population

	2008/09	2029/30	Forecast Annual Growth Rate
Passenger Movements	3.7 million	8.6 million	4.3%
Employee Population	N/A	N/A	N/A

Passenger Movements Source: BITRE

Land transport at Cairns Airport is spread across private car, shuttle bus and taxi services. Private vehicles, including drop-off and pick-up (15 per cent), onsite parking (9 per cent) and offsite parking (1 per cent), account for 25 per cent of land transport mode share. Both shuttle bus (i.e. hotel transfers, shuttle and tour buses) and taxis each account for 26 per cent mode share. With one of the largest rental car markets across Australia, Cairns Airport has a rental car mode share of 19 per cent.

Table 12
Cairns Airport land transport mode share

Mode	Mode Share
Private Car - Drop-Off and Pick-Up	15%
Private Car – Parked Car	9%
Private Car – Parked off site	1%
Shuttle Bus (includes tour bus and hotel transfers)	26%
Taxi	26%
Rental Cars	19%
Limo	1%

Note: Mode Share reported for Domestic passengers only as at October 2009

The strategic focus of Cairns Airport is to plan road and public transport access to the airport with the state government and to develop and consolidate efficient and cost effective transport for passengers. Directing efforts to land transport planning with local and state governments that identify the required road infrastructure improvements will contribute to addressing congestion at Cairns Airport. Short and long term land transport priorities for Cairns Airport are provided in more detail in Table 13.

Table 13
Land transport priorities for Cairns Airport

Time Frame	Project Priority	Rationale
Short Term (projects to address existing capacity deficiencies and priorities within 3 years)	Cairns Airport in conjunction with the state government to plan for additional access points to the Airport (i.e. as opposed to the single access road currently used).	The single access road to the airport is congested at peak times and any road incidents become a major issue in accessing the airport.
	Cairns Airport to develop a covered car park for premium users (short and long stay). Planning for the car park is in concept design phase.	Cairns Airport currently has no undercover parking facilities and demand exists for the facilities.
Long Term (projects expected to meet 2030 demand)	Cairns Airport to work in conjunction with the state government to plan for the provision of public transport services (i.e. bus).	One of the key issues for Cairns Airport is that public transport is limited. The majority of passengers use tour buses, taxis and rental cars to get to and from the airport.

Gold Coast Airport

The Gold Coast Airport is located approximately 20 km from central Surfers Paradise (i.e. Cavill Ave). In 2009/10, Gold Coast Airport had an estimated 4.2 million passenger movements. From 2002/03 to 2009/10, the compound average annual growth rate at the Gold Coast Airport was 12.9 per cent. This comprised 11.6 per cent annual growth for the domestic market and 23.4 per cent for the international market. It is expected that Gold Coast Airport will grow at 5 per cent per annum over 20 years to 11 million passenger movements in 2029/30.

An estimated 587 full time equivalents were employed at the Gold Coast Airport as at June 2005. Growing at an annual rate of 22 per cent, by June 2010 a total of 1,719 individuals were employed within the aviation precinct of the Gold Coast Airport (i.e. equivalent to 1,319 full time equivalents).

Table 20
Gold Coast Airport passenger movements and employee population

	2009/10	2029/30	Forecast Annual Growth Rate
Passenger Movements	5.2 million	11.0 million	4.9%
Employee Population	1,319	NA	NA

Passenger Movements and Employee Population Source: Gold Coast Airport Passenger Statistics and Economic Impact Studies

Journeys to Gold Coast Airport are conducted primarily by private car. Mode share for private car (including parked at airport site and drop-off and pick-up) accounts for an estimated 36 per cent of all journeys to the airport. Mode share for the remaining land transport, taxi, rental car and shuttle bus/ coach options are relatively similar. Rental cars account for 21 per cent of journeys to the airport, while taxi and shuttle bus/ coach both have a mode share of 17 per cent. Private vehicles are the predominant form of land transport to the Gold Coast Airport and the land transport issues of most concern for the airport include road congestion, parking and the master planning process.

Table 21
Gold Coast land transport mode share

Mode	Mode Share
Private Car - Drop-Off and Pick-Up and Parked Car	36%
Taxi	17%
Rental Car	21%
Shuttle Bus/ Coach	17%

Note: Figures do not add to 100% as Gold Coast figures were calculated with reference to a base patronage figure that includes transfer passengers not using ground transport. Mode share reported at October 2009.

The strategic focus of the Gold Coast Airport is on providing an efficient, diverse and responsive land transport network, by improving access to the airport, improving car parking, and undertaking formal consultation with the state government during the master planning process. A detailed list of short, medium and long term land transport planning priorities is discussed in detail in Table 22.

Table 22
Land transport priorities for Gold Coast Airport

Time Frame	Project Priority	Rationale
Short Term (projects to address existing capacity deficiencies and priorities within 3 years)	Queensland Department of Transport and Main Roads (DTMR) in conjunction with Gold Coast Airport to plan an additional entry/exit point at the Bilinga Interchange which will divert traffic from the Tugun Bypass. The funding agreement is currently being negotiated.	Congested Airport entry point. An additional entry/exit point is needed at Bilinga Interchange, which will take traffic from the Tugun Bypass.
Medium Term (projects expected to meet 2020 demand)	DTMR, Gold Coast City Council and Gold Coast Airport to plan for light rail construction to extend to the Gold Coast Airport.	The Gold Coast bid for the 2018 Commonwealth Games would require mass transit planning for national and international visitors to the region.
Long Term (projects expected to meet 2030 demand)	DTMR in conjunction with Gold Coast Airport to upgrade a second entrance to the airport through an at-grade signalised intersection at the intersection of the Gold Coast Highway and the Tweed Bypass.	The current entrance can no longer cater for traffic volumes with an acceptable level of service.
	Gold Coast Airport to develop a multi-modal transit centre to include bus and rail connections, ground transportation facilities, information regarding hotel and tourist accommodation.	Development of a multi-modal transit centre at the airport terminal to connect the airport to the existing transport network and to provide local support to the tourist market.
	Gold Coast Airport is making a provision for a heavy rail in their master planning process. This will require early planning by the State government and Gold Coast Airport.	Forecast long term passenger movements at Gold Coast Airport will require planning for mass transit land transport options.

Other issues for Gold Coast Airport include:

- Landside roads and the car park area require road improvements; and
- There is no formal consultation with the Queensland Government regarding land transport issues, recognising that some issues affect the NSW Government.