



18 November 2015

**Chief Executive Officer's Presentation
Annual General Meeting – 18 November 2015**

Attached is a copy of the Chief Executive Officer's presentation to be delivered today at the Annual General Meeting of Cabcharge Australia Limited at the Westin Hotel, Sydney.

Adrian Lucchese
Company Secretary

ANDREW SKELTON
CHIEF EXECUTIVE OFFICER

TRANSF

Cabcharge

FY15 FINANCIAL OVERVIEW

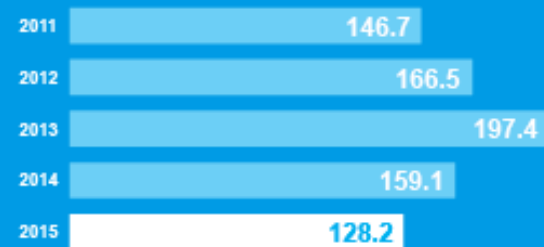
REVENUE (\$m)



NORMALISED PROFIT AFTER TAX* (\$m)



GROSS DEBT (\$m)



NET PROFIT AFTER TAX

\$46.5m

DIVIDEND (FULL YEAR FULLY FRANKED) PER SHARE

20c

- ^ Before:
- Impairment charges in FY12, FY13, FY14 and FY15
 - ACCC settlement in FY11

FY15 HIGHLIGHTS



**RECORD FLEET GROWTH
IN TAXI SERVICES**

TOTAL FLEET
7,259 CARS
An increase of 533 cars (up 7.9%)



**CONTINUED GROWTH
IN TAXI FARES PROCESSED**

\$1,118 M
An increase of 8.6%



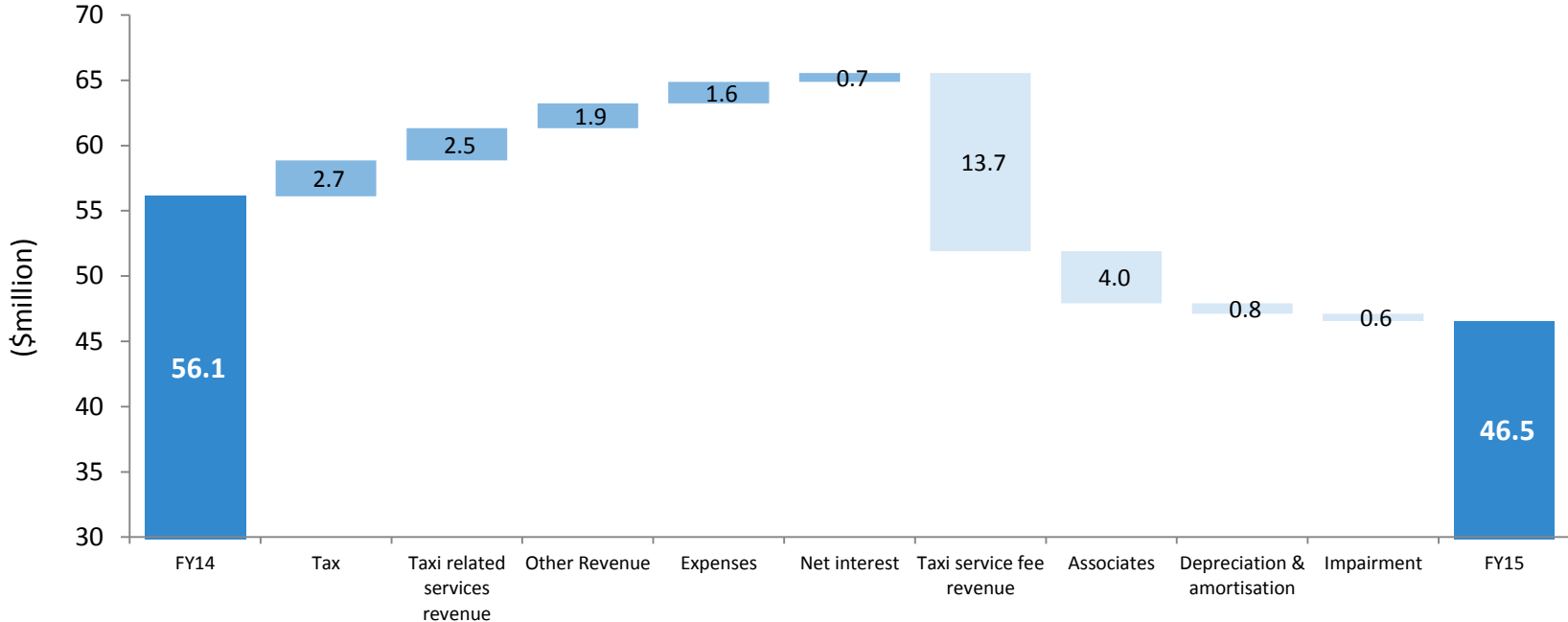
**ADDRESSING DECLINE IN
CABCHARGE ACCOUNTS (2H15)**

-0.4%
Previously - 4.8%



OPERATIONALISED A PAYMENTS SWITCH

PROFIT AFTER TAX – TWELVE MONTH MOVEMENT



PARTNERSHIP with ComfortDelGro

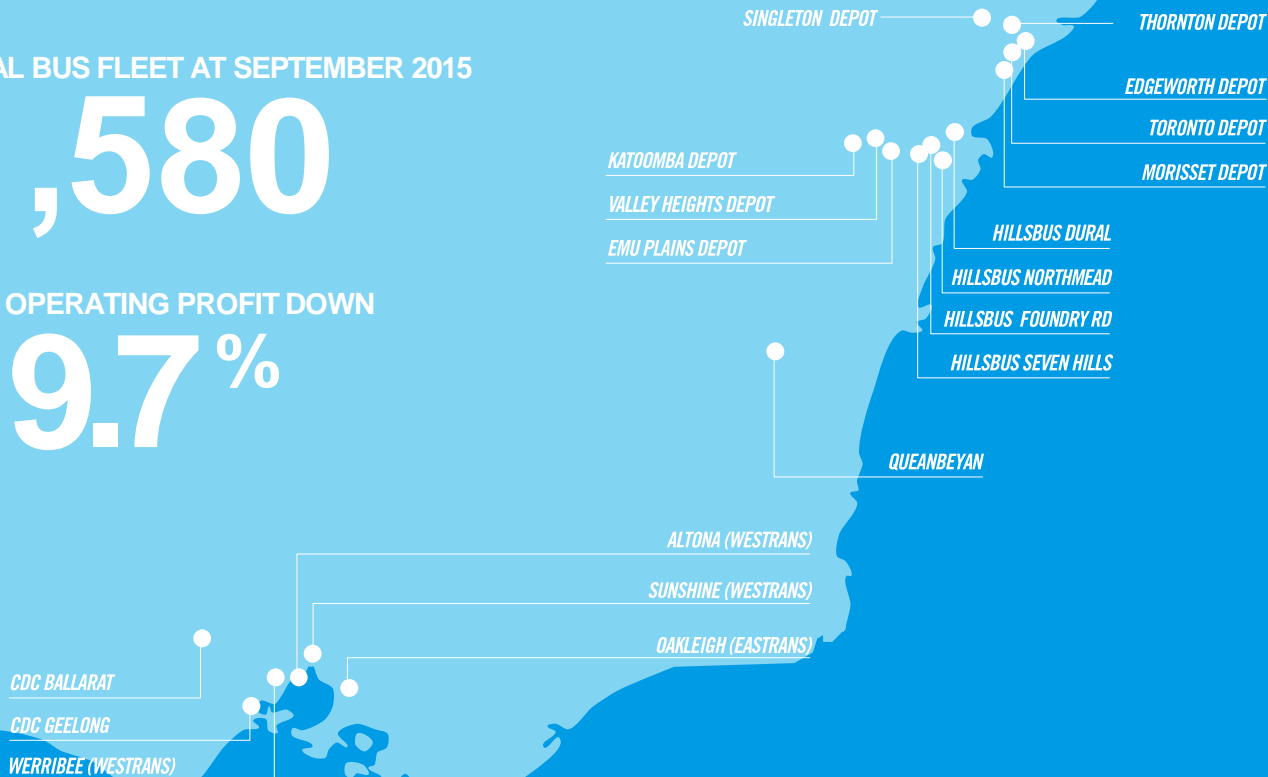


TOTAL BUS FLEET AT SEPTEMBER 2015

1,580

FY15 OPERATING PROFIT DOWN

-19.7%



PARTNERSHIP with ComfortDelGro - UK



FY15 OPERATING PROFIT DOWN
-15.5%

ComCab Taxis
Comfort Executive Private Hire
ComfortCars Private Hire
Westbus Coaches Charter

ABERDEEN



EDINBURGH



TOTAL TAXI / HIRE CAR FLEET

2,918

TOTAL COACH FLEET

42

LIVERPOOL



BIRMINGHAM



LONDON



TAXI FLEET

TOTAL FLEET SIZE OF CABCHARGE OPERATED NETWORKS

6,959 / 7,483
AGM 2014 / CURRENT

SOUTH AUSTRALIA

297 / 289
AGM 2014 / CURRENT

NEW SOUTH WALES

4,158 / 4,299
AGM 2014 / CURRENT

VICTORIA

2,504 / 2,895
AGM 2014 / CURRENT

BUREAU SERVICES



BUREAU SERVICES

ALICE SPRINGS 2015



PAKENHAM TAXIS 2015



FY15 TECHNOLOGY

PAYMENT TERMINALS

22,048

TURNOVER

\$1.2b

TRANSACTIONS PROCESSED

42m

CONTACTLESS TRANSACTIONS

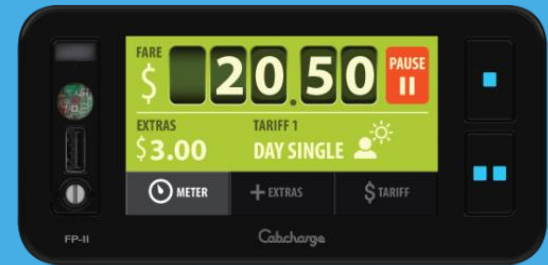
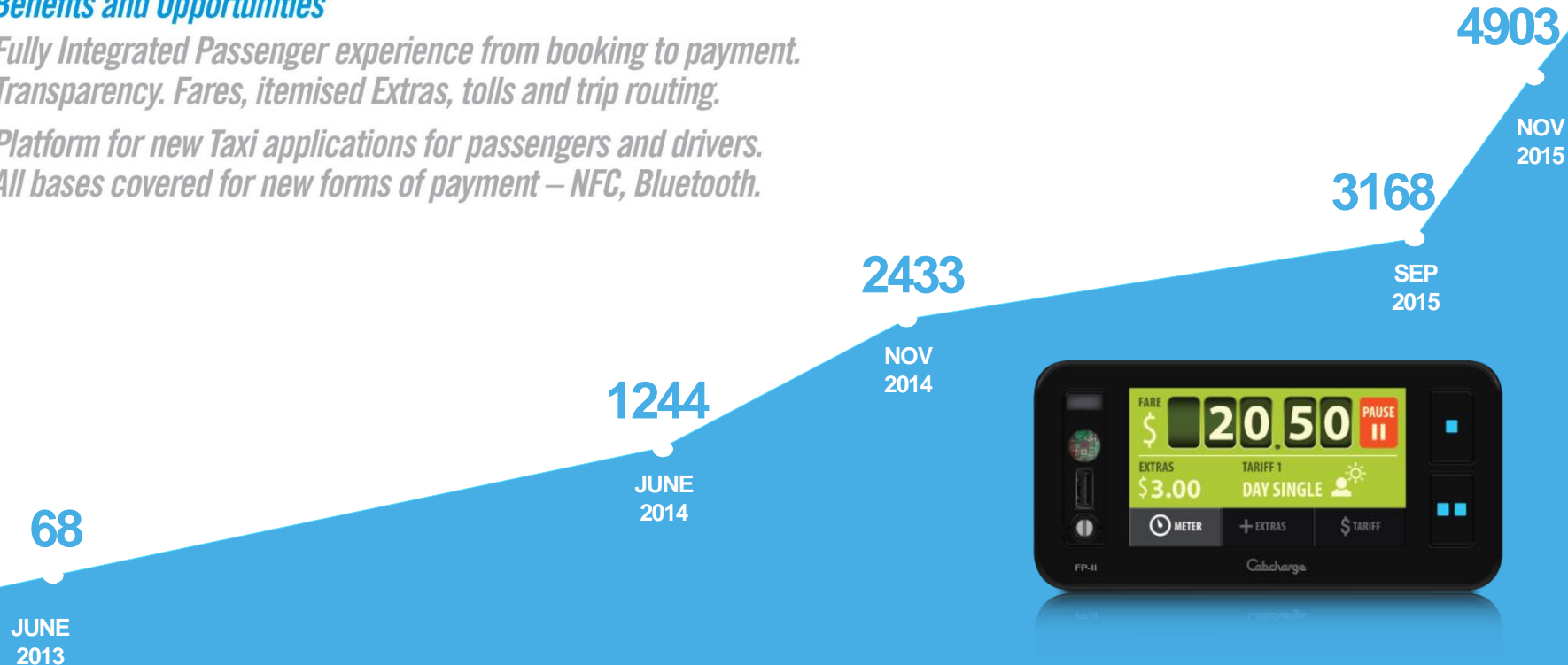
50%+

FAREWAYplus

Benefits and Opportunities

*Fully Integrated Passenger experience from booking to payment.
Transparency. Fares, itemised Extras, tolls and trip routing.*

*Platform for new Taxi applications for passengers and drivers.
All bases covered for new forms of payment – NFC, Bluetooth.*



Technology

Launched Australia's first taxi booking app for Apple Watch

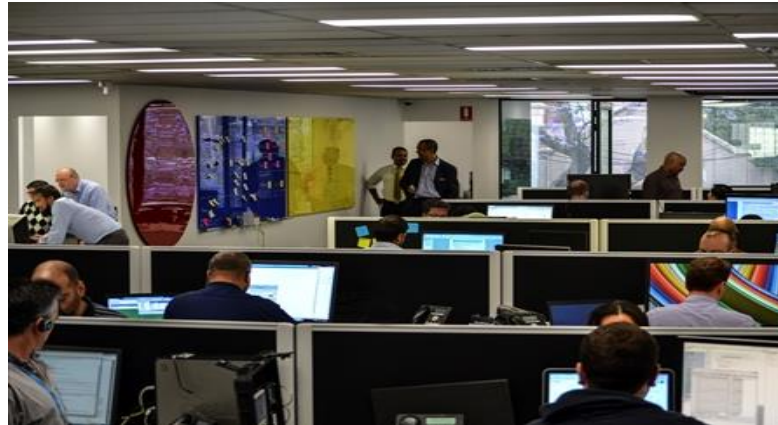


Migrated all taxi dispatch centres onto common technology

Processed first Apple Pay transaction

Operations

Relocated EFT Solutions technology team to Corporate Office



Relocated Adelaide Taxi Network to better premises

Relocated Sydney vehicle inspection and regulatory compliance centre

Marketing & Sales

*Launched Tax
Subsidy Scheme
for the Tasmanian
Government*

*Upgraded Account
Statements and
information for Cabcharge
account holders*

*“The new invoice/statement
format is much clearer and
easy to read”*

Aruna, Department of Social Services

*Became the AFL's
official partner for
Private Transport
Services*



Taxi Operations

Completed the acquisition of Dandenong Taxis in South East Melbourne

Launched 13CABS Peninsula Taxis on Victoria's Mornington Peninsula

Introduced Tiger Team into Adelaide (mobile driver security and support services)



PEOPLE & CULTURE

Staff & Culture “Embracing Change”

Past

Silos
Cost focused, defensive
*‘We’ve always done it
this way’*

Now

Agile & Active
*Structured multi-
disciplinary project
approach*
*Broader vision of
Cabcharge’s relevance*

Looking Ahead

*Sophisticated HR
practice group linking
recruitment,
development and
performance with
corporate strategy*

STRATEGIC TASKS



INTEGRATING
NETWORKS



COMMITTING
TO A KEY BRAND



LINKING BOOKINGS
AND PAYMENTS



SUPPORTING OUR
MERCHANT PARTNERS



LOOKING AFTER
OUR CUSTOMERS

Integrating Networks



**Implemented
A National Management
Structure with a new
team**

November 2014

**Standardised
taxi booking
Input software**

April 2015

**Standardised
Smartphone apps**

June 2015

**Progressed
Standardisation of
Dispatch processes**

April 2015

**Selected a new
Phone system for
National Roll-out
and finalised project plan
for implementation**

“We are building a stronger company”

STRATEGIC TASKS

2/5

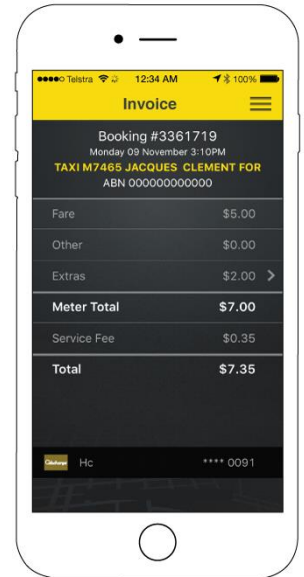
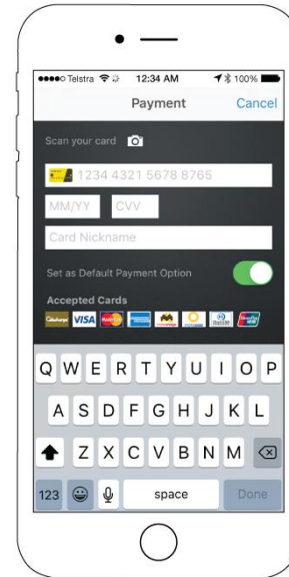
Committing to a Key Brand



**Consolidated
Legacy network
Brands in Sydney
(Silver Service and
Taxis Combined)**

**Relaunched taxi network
Brand in Adelaide and
consolidated branding
between Adelaide and
Melbourne networks**
May 2015

**Prepared national app
functionality**



Linking Bookings + Payments



Built and tested app for rank and hail payments

November 2014

Built and delivered in-app payment functionality to MTDData for testing with MTDData clients

May 2015

Designed and successfully processed in-app payments for Bellarine Taxis (Pilot)

March 2015

Payment functionality to be released for network apps (eg 13CABS) in 1H16

“Preparing to launch step change service improvements”

Supporting our Merchant Partners



Introduced a dedicated Merchant Support Team

November 2014

Entered new Merchant Agreements with networks affected by the introduction of government price controls

November 2014

Rolled out new Application process For Merchants

December 2014

Introduced daily Payment of transactions for taxi networks

March 2015

Implemented CRM For Merchant Partners

January 2015

Designed and implemented new website for Merchants

May 2015

“Focused on supporting market share gains”

STRATEGIC TASKS

5/5

Looking after our Customers



**Instituted
National call
Answer standards**

November 2014

**Restructured CCN
Contact Centre to adopt a
best practice team based
structure**

March 2015

**Introduced Transport
Solutions staff in
Adelaide and Sydney**

December 2014

**Reconfigured
Driver Services
Team at CCN**

March 2015

**Upgraded
Recruitment and training
processes and increased
number of customer
service roles**

“Retention is a cornerstone of our growth”

PICKING UP

SERVICE IMPROVEMENTS ON THE STREET

- *Enhanced booking dispatch process implemented in Sydney on 29 October 2015*
- *Incentivising Drivers to pick up passengers*
- *Rewarding Drivers for servicing short trips*



11.5%

Average Bookings per Day



3.6%

*Average Customer Pickup Time**



54.2%

Average Recalls

**Based on short trips post dispatch enhancements*

PICKING UP

SERVICE IMPROVEMENTS ON THE PHONES

- 1. Delivering faster service*
- 2. Servicing more customers*



59.7%

*Average time to answer calls in Sydney
Sep 15 compared to Sep 14*



12.6%

*Customer Calls answered in Sydney
Sep 15 compared to Sep 14*

KEY MESSAGES

- 1. The fundamentals of our business are continuing to improve with structural and leadership change***
- 2. Our business has developed strong platforms and products that can be adapted to new markets***
- 3. 2016 will see a continuing effort to streamline the organisation with a particular emphasis on customer centricity and solutions innovation***

Disclaimer

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