



Údarás Náisiúnta Iompair
National Transport Authority

National Maximum Taxi Fare Review 2019

Taxi Driver Survey

July 2019



Introduction



- This report details the findings of a telephone survey of taxi drivers undertaken by Behaviour & Attitudes on behalf of the National Transport Authority.
- The main objective of the research is to gauge current expenses incurred by taxi drivers, as well as an assessment of their potential income, in order to conduct a taxi fare review.
- Where possible, comparative results have been included from previous waves. The previous waves were conducted by Kantar Millward Brown Research.
- We have included findings relative to wheelchair and non-wheelchair accessible vehicles.

Methodology

A telephone survey undertaken with taxi drivers, using a list provided by the NTA.

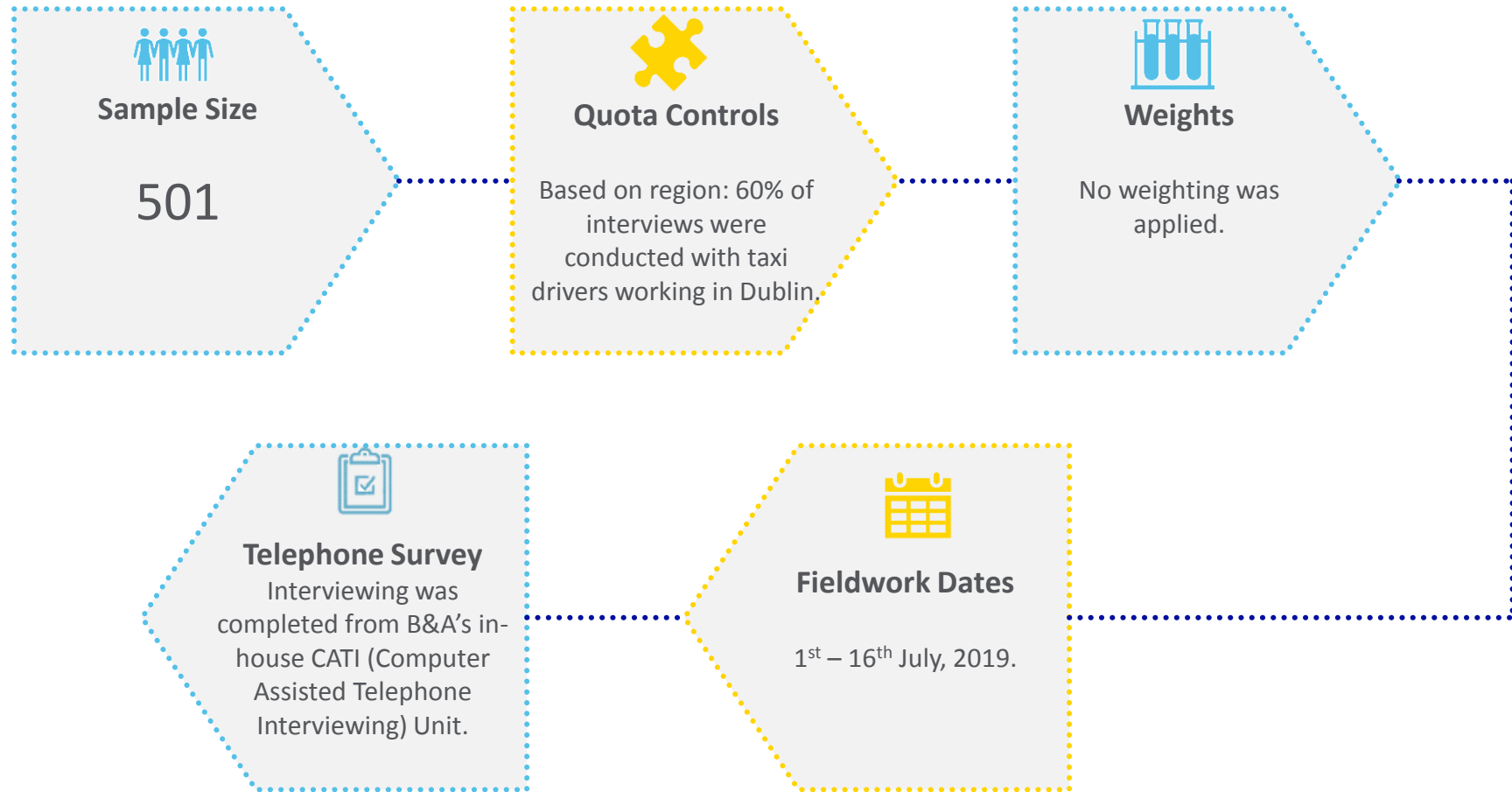




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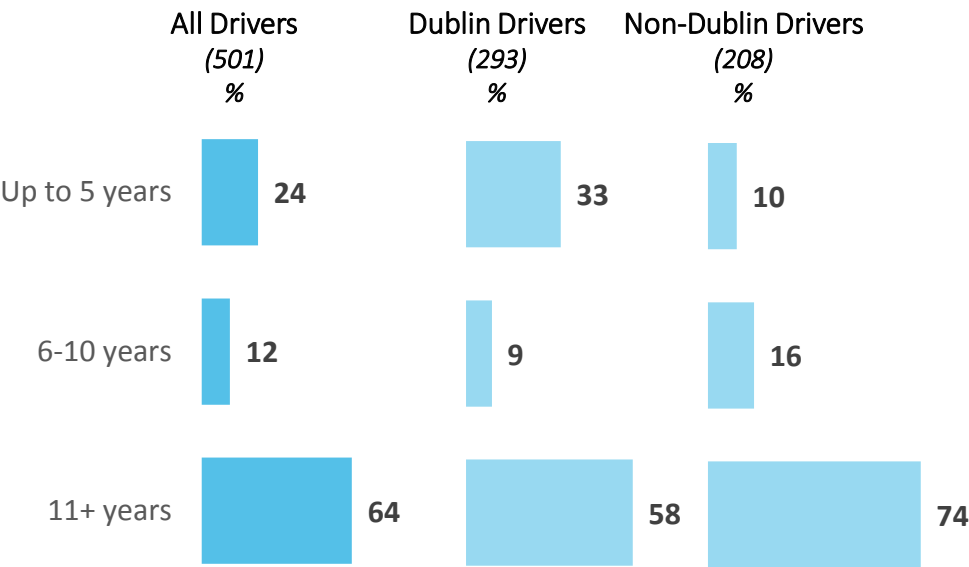
Profile of sample

Profile of sample

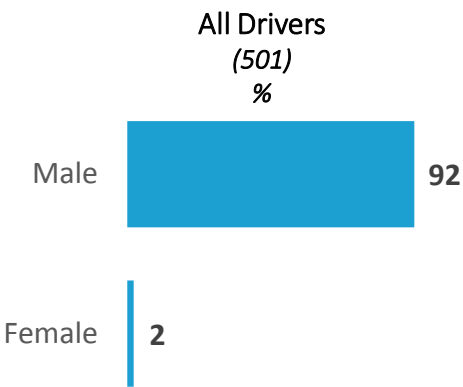


Base: All taxi drivers: 501

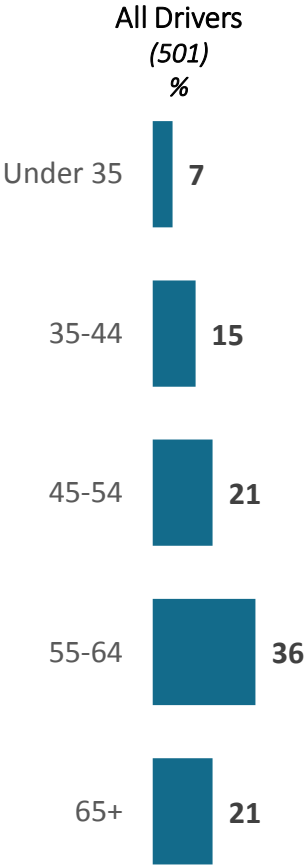
Number of years working as a taxi driver....



Gender



Age



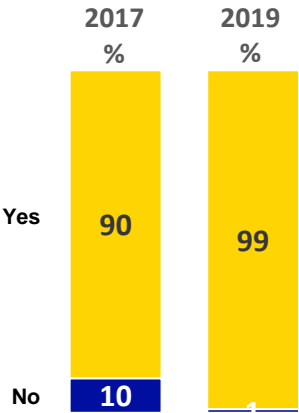
***Almost all (99%)
of taxi drivers
interviewed
own their
vehicle
(+9 vs. 2017)***

***100%: WAV Drivers
98%: Non-WAV Drivers***

Profile of sample

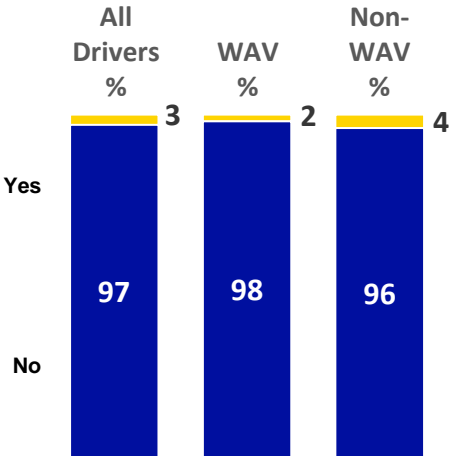
Base: All taxi drivers: 501

Own a Taxi

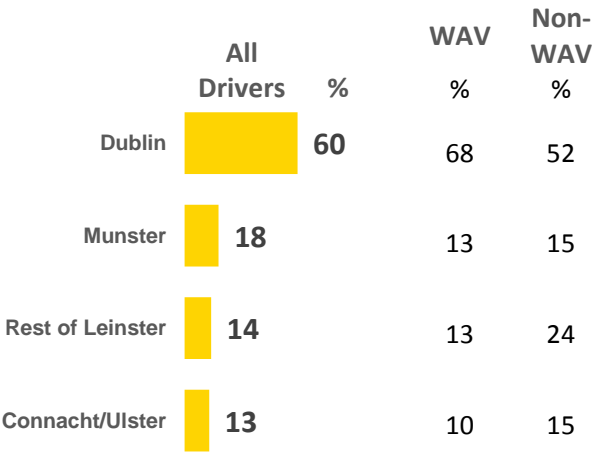


(Base: 496 own a taxi)
6% own a fleet (n=30),
with 2.77 taxis owned on
average among this group.

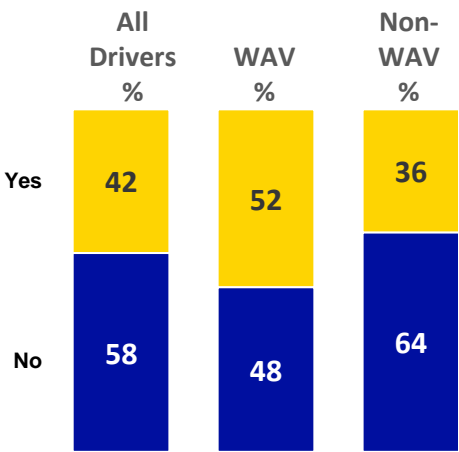
Share a Taxi



Region



Operate in Rural Areas

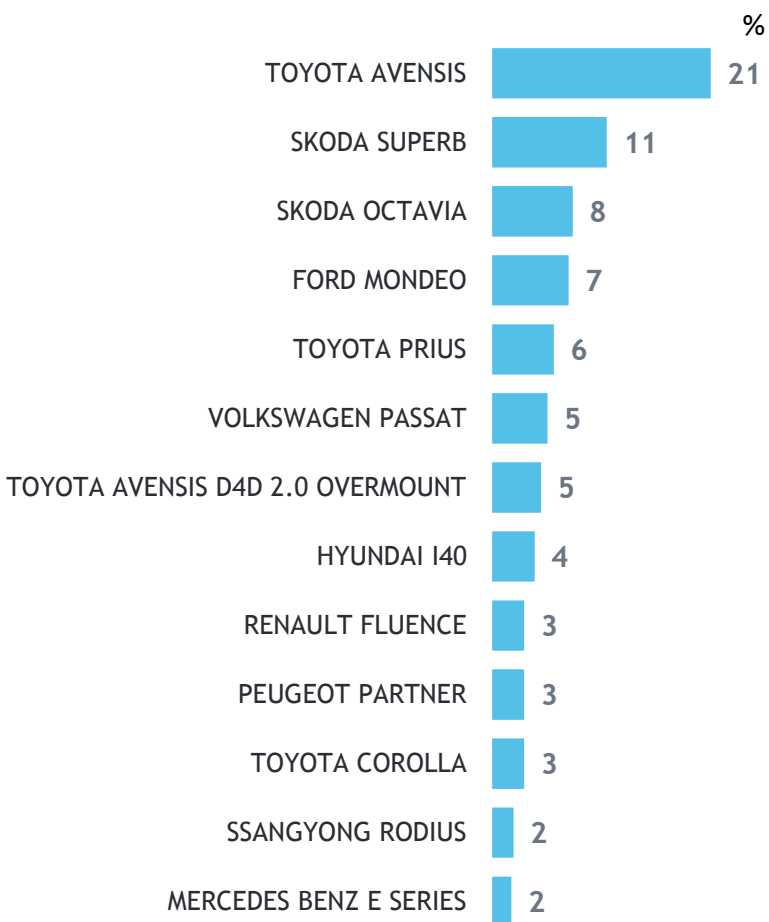




Vehicle Details

Type of vehicle: Non-WAV

Base: All Non-WAV taxi drivers: 253



Average No. of Seats

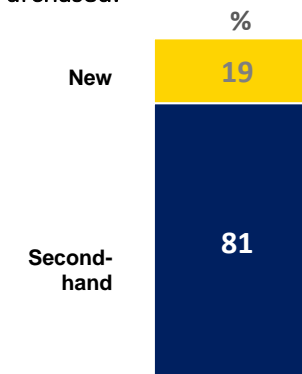
4.89
on average

Engine Type

| | % |
|------------------|----|
| Diesel | 87 |
| Petrol | 7 |
| Hybrid | 6 |
| Plug in electric | 0 |

New/Second-hand

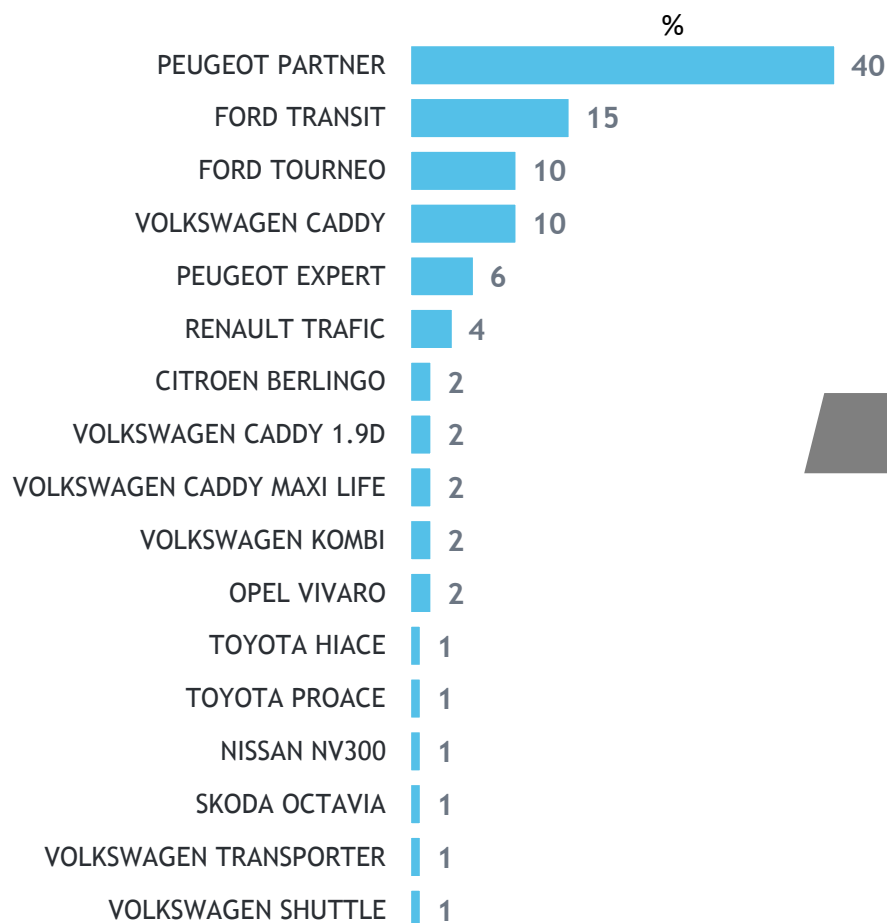
Purchased:



A fifth of those driving non-wheelchair accessible vehicles have a Toyota Avensis. Diesel most popular type of car (87%), while 19% of drivers of non-WAV vehicles purchased them new.

Type of vehicle: WAV

Base: All WAV taxi drivers: 248



Average No. of Seats

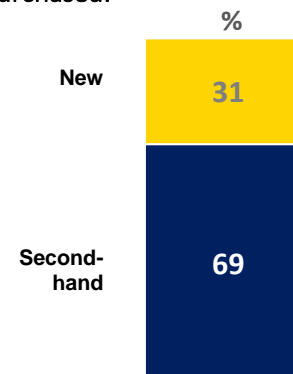
6.21
on average

Engine Type

| | % |
|------------------|-----|
| Diesel | 100 |
| Petrol | - |
| Hybrid | - |
| Plug in electric | - |

New/Second-hand

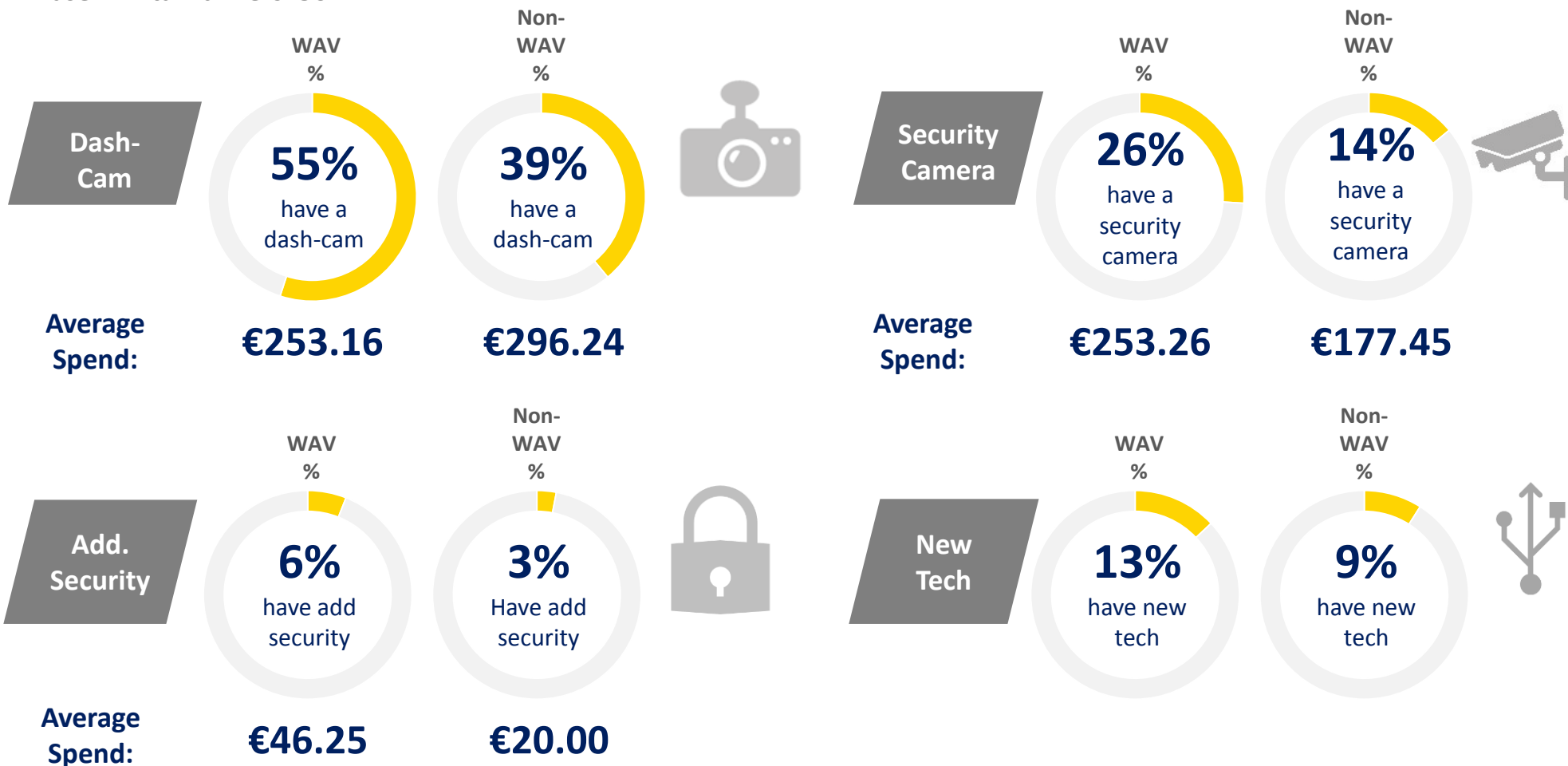
Purchased:



2 in 5 drivers of WAV vehicles are driving a Peugeot Partner. On average, they have 6 seats, and all are diesel engines. 3 in 10 purchased their vehicles new.

Security & technology in vehicles

Base: All taxi drivers: 501



Dash-cams more common among WAV vehicles, as are security cameras. 6% of WAV have additional security vs. 3% of non-WAV drivers.

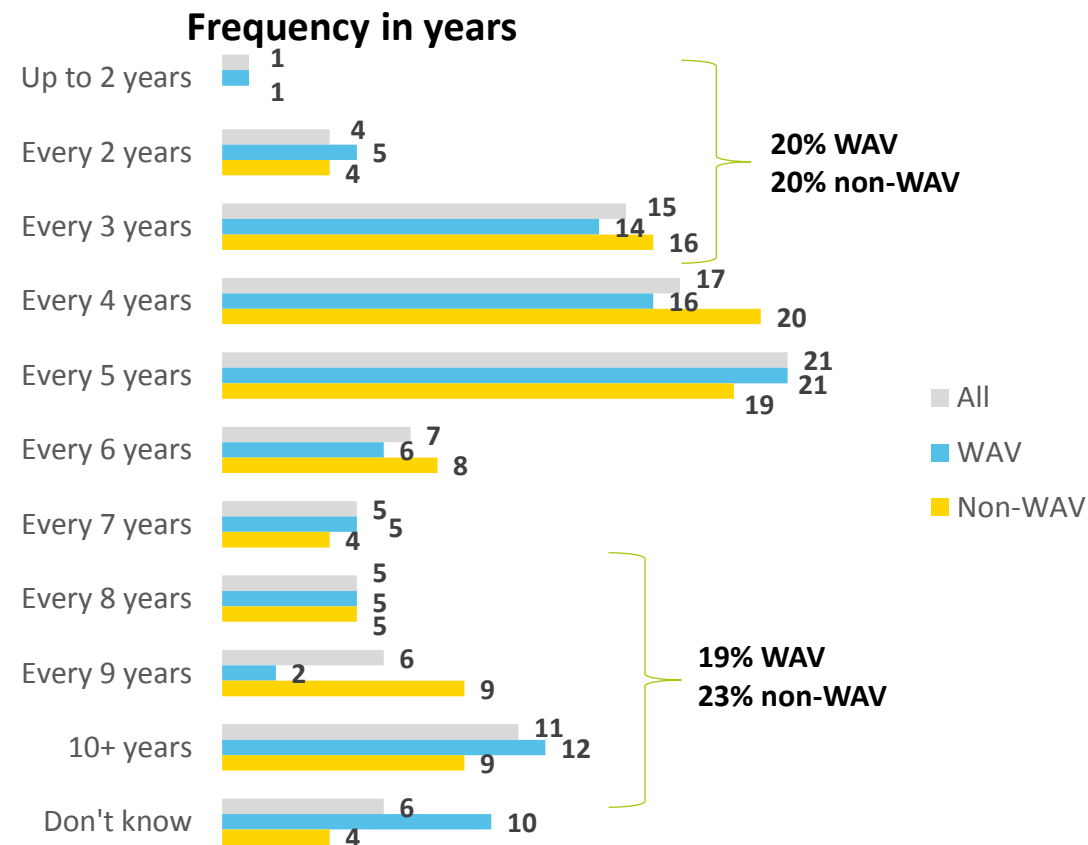


***On average,
taxi drivers
change their
vehicle every
5.5 years.***

| | |
|---------|------|
| WAV | 5.37 |
| Non-WAV | 5.60 |

Frequency of replacing vehicle

Base: 496 taxi drivers own their vehicle



Average frequency in kilometres

ALL
216,112
kilometres

WAV
224,820
kilometres

Non-WAV
209,042
kilometres

Although a similar proportion of WAV and non-WAV drivers change their cars once every 3 years, non-WAV drivers marginally more likely to change every 8 years or longer. WAV drivers claim to do more kilometres before changing on average, however.

***Taxi drivers
claim to change
their tyres 1.82
times a year on
average.***

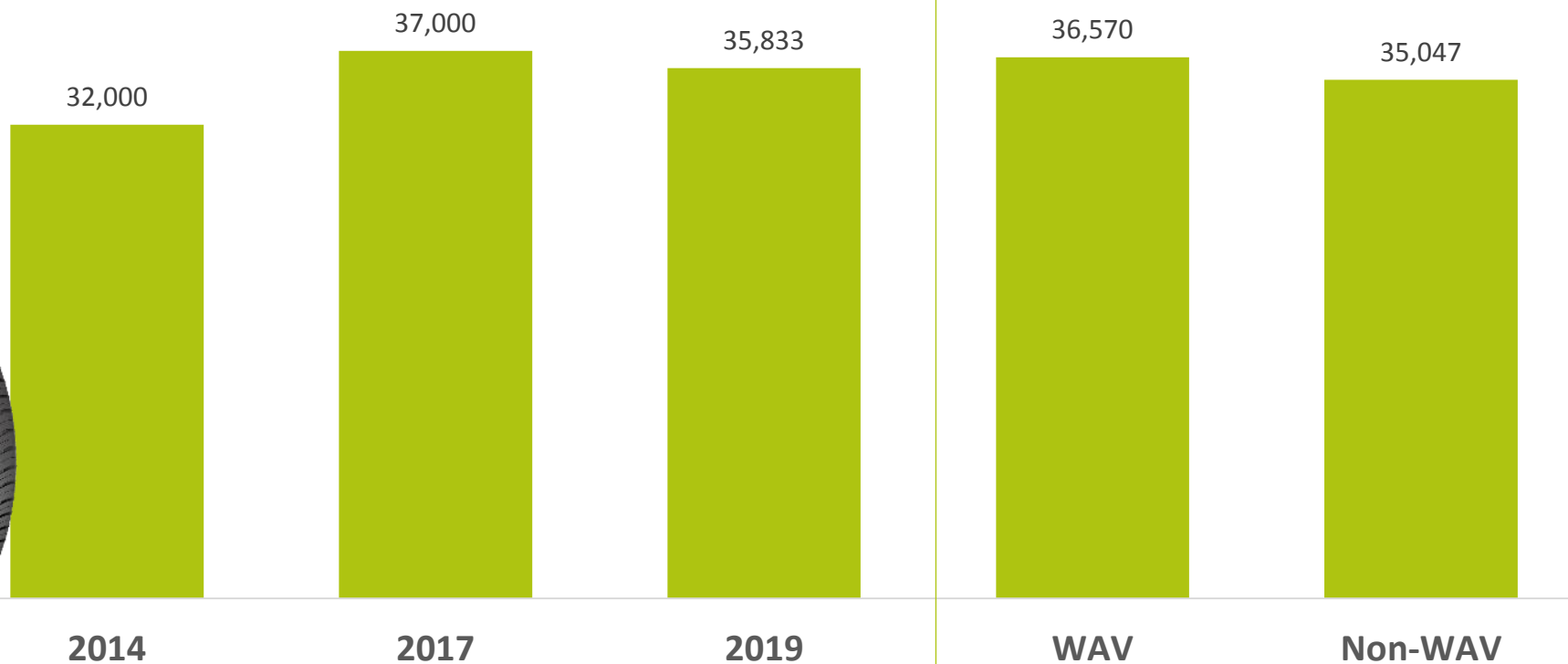
***(Similar to 2017 findings –
twice a year.)***

| | |
|---------|------|
| WAV | 1.94 |
| Non-WAV | 1.70 |

Frequency of replacing tyres

Base: All Taxi drivers: 501

Average frequency in kilometres



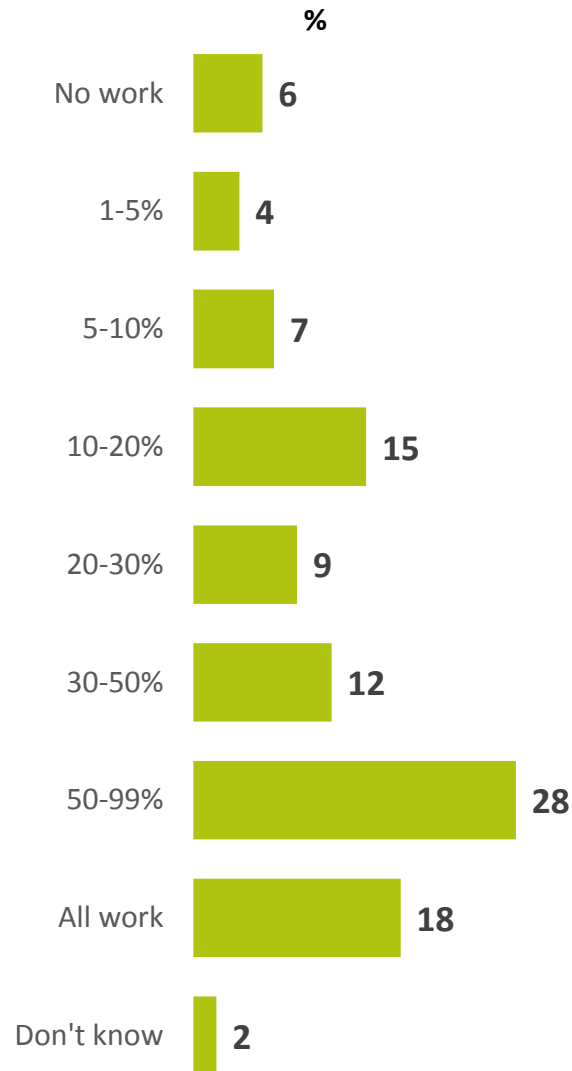
*On average, taxi drivers change their tyres every 35,800 kilometres.
This is slightly lower than the average recorded in 2017.*



Taxi driver affiliates

Proportion of on-street work: Non-WAV

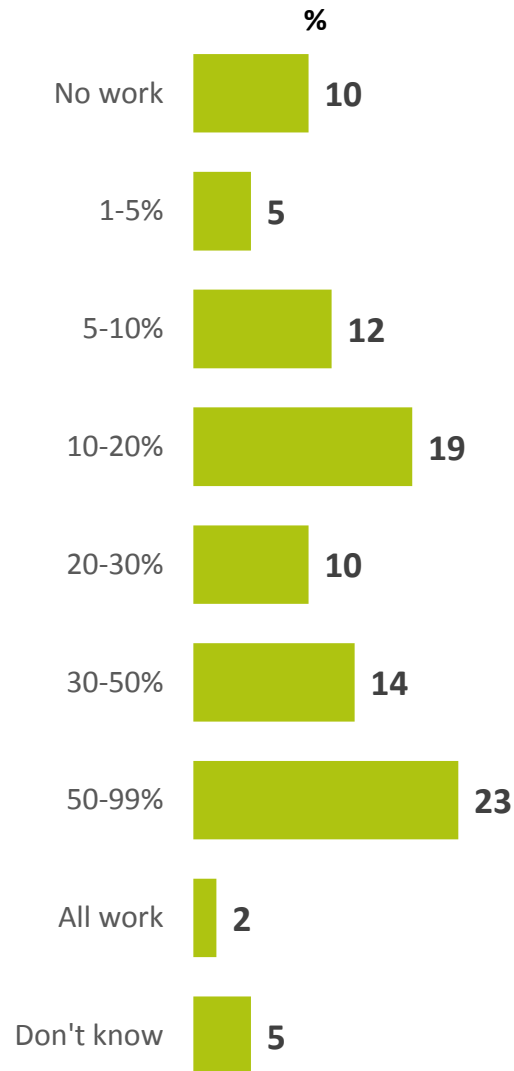
Base: 253 Non-WAV taxi drivers



***On average,
46% of work
comes from
on-street.***

Proportion of on-street work: WAV

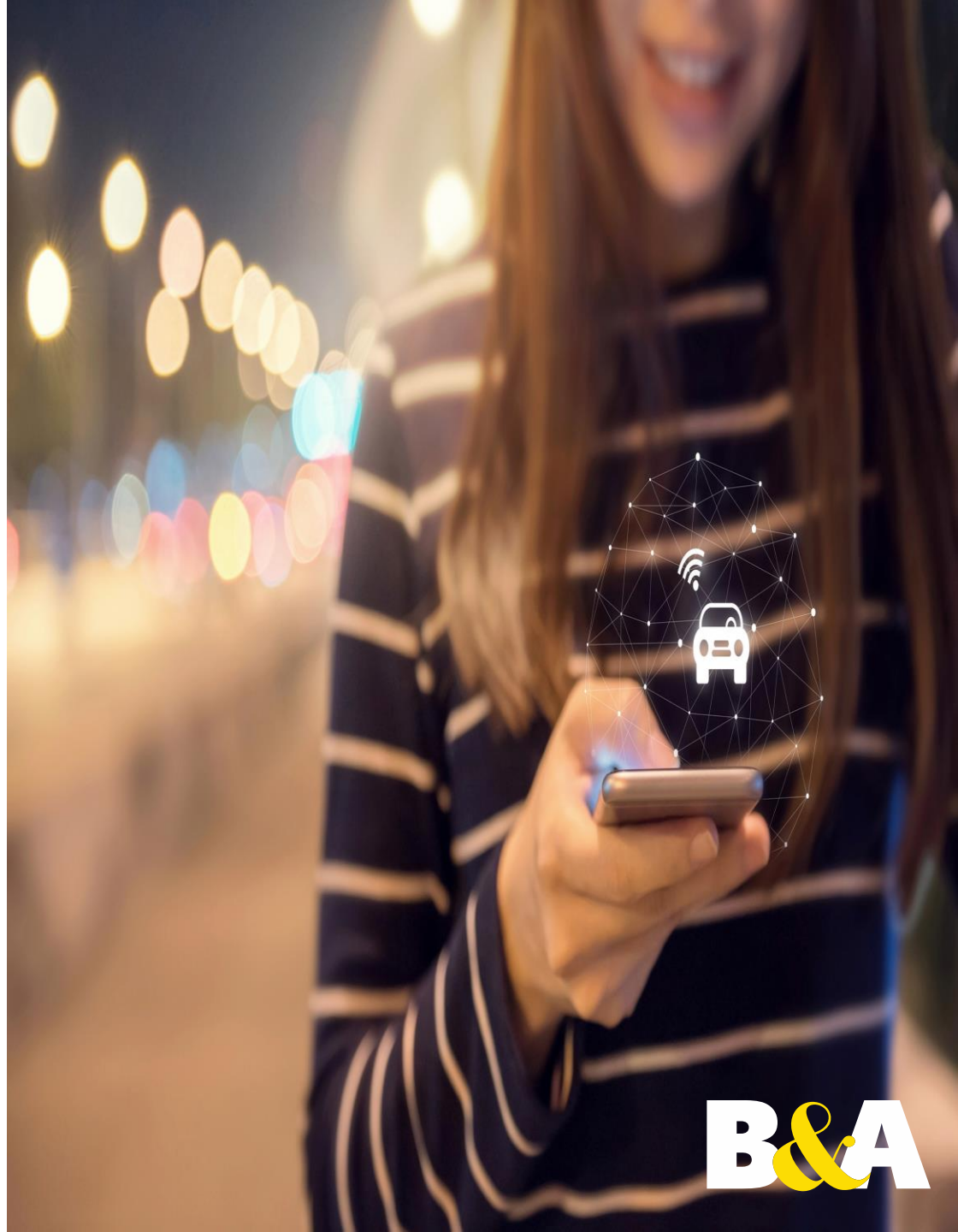
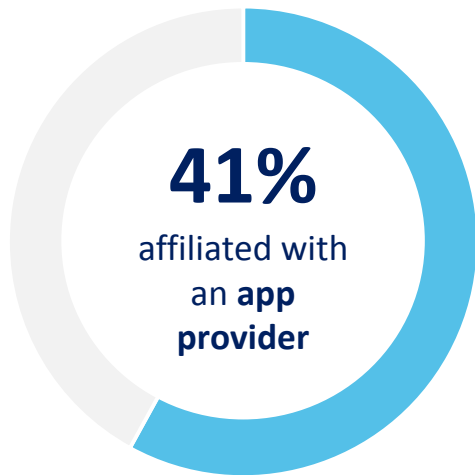
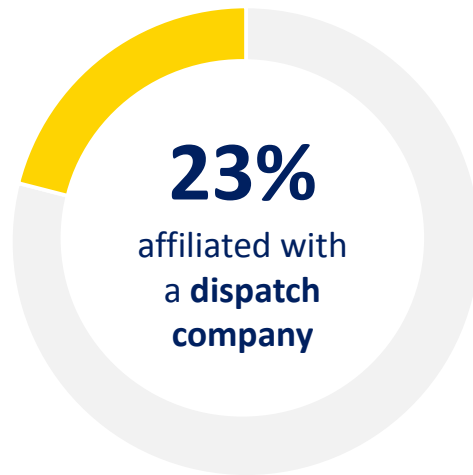
Base: 248 WAV taxi drivers



***On average,
28% of work
comes from
on-street.***

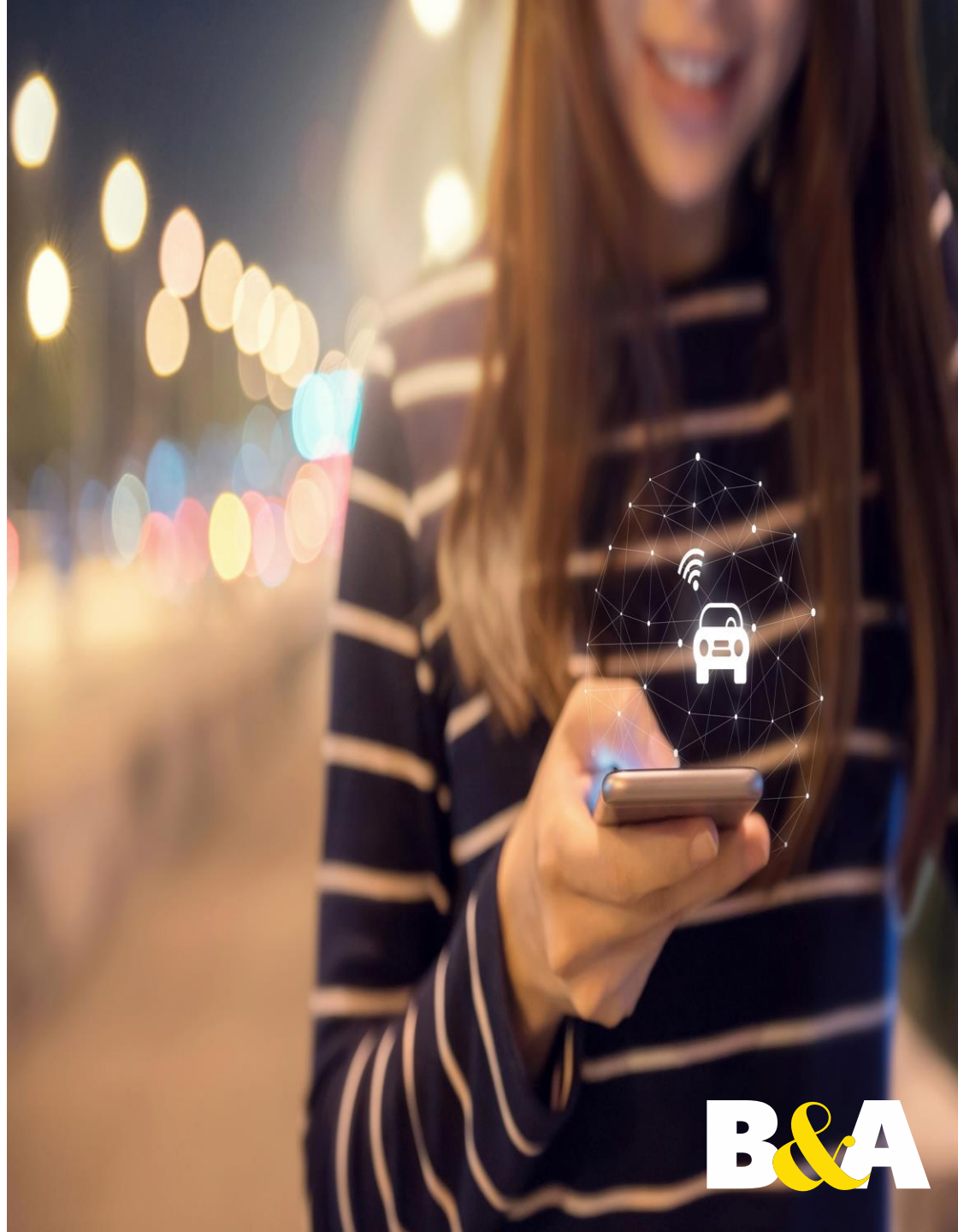
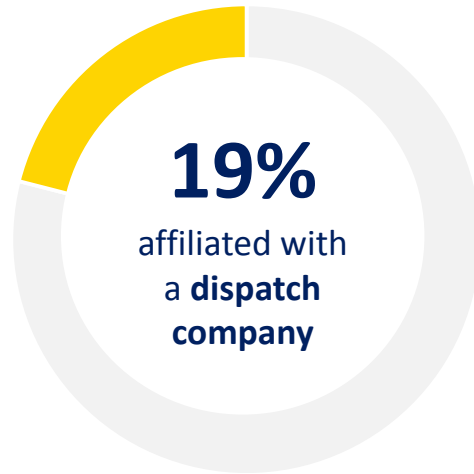
Non-WAV Taxi Driver Affiliates

Base: 253 Non-WAV taxi drivers



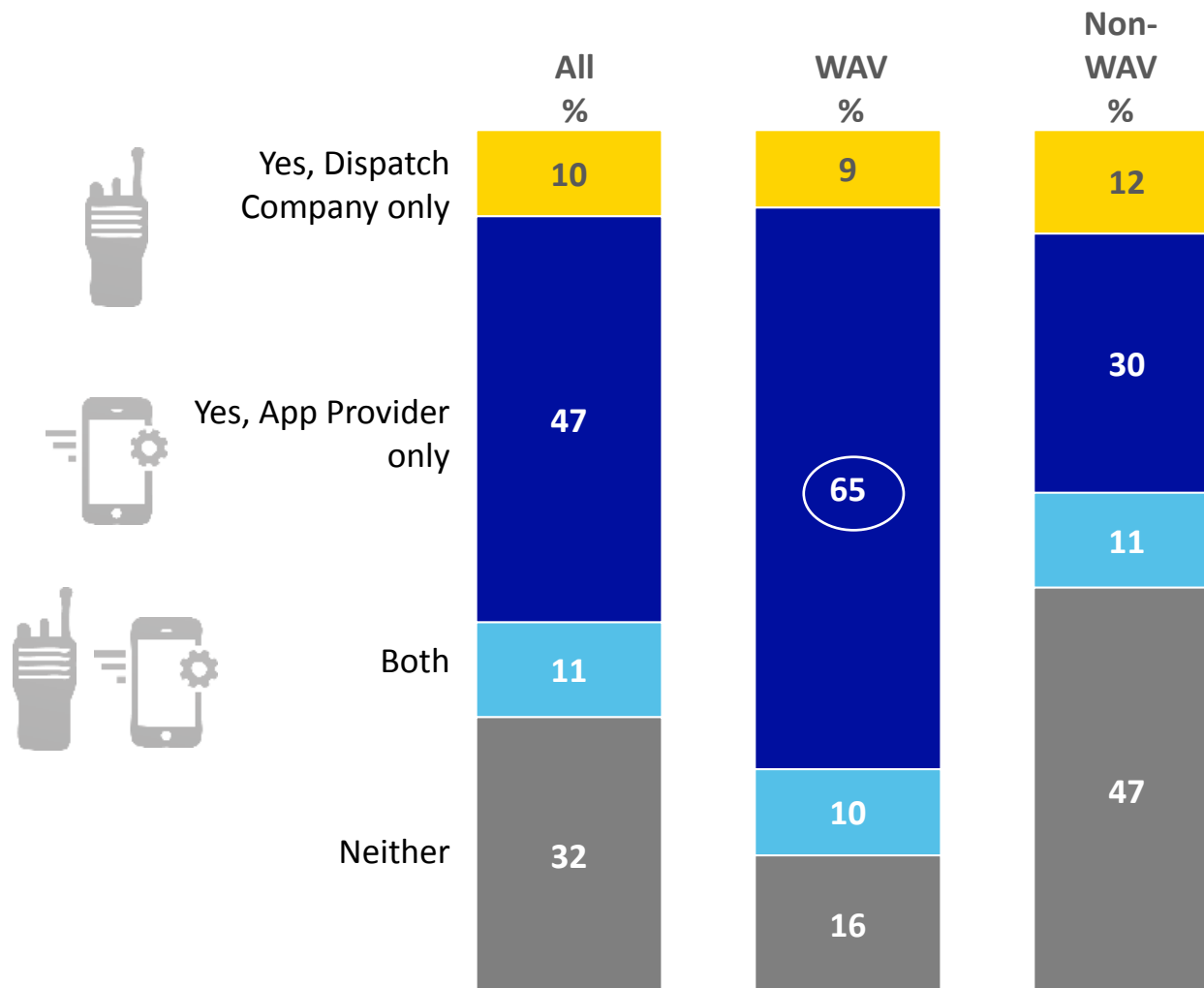
WAV Taxi Driver Affiliates

Base: 248 WAV taxi drivers



Taxi Driver Affiliates

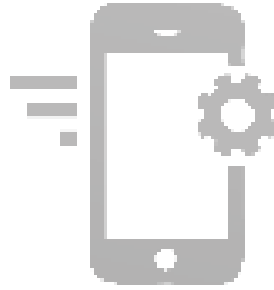
Base: All taxi drivers: 501



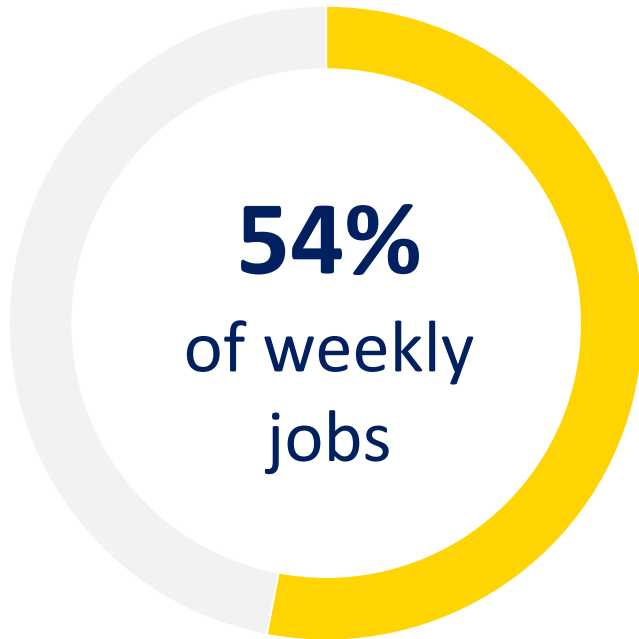
65% of WAV drivers are affiliated with an app provider but not a dispatch company compared with 30% of Non-WAV drivers. The latter marginally more likely to be affiliated with a dispatch company only (12% vs. 9% among WAV drivers).

Average weekly jobs via smartphone apps

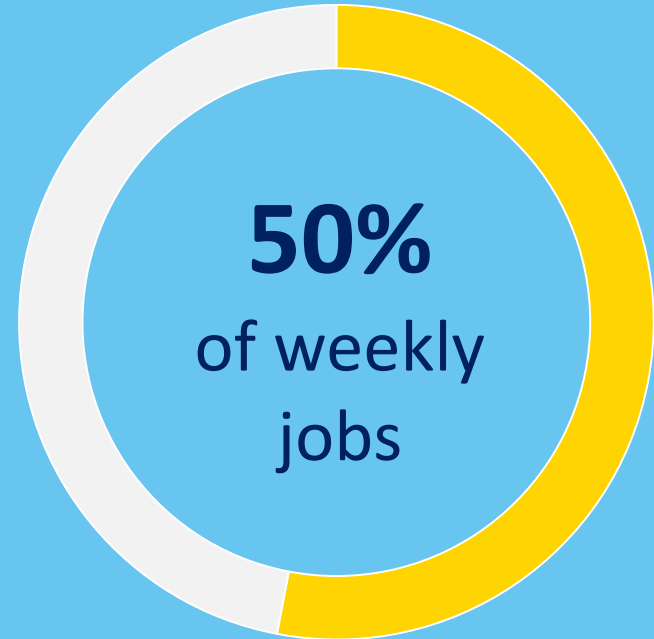
Base: 290 drivers ever get work via an app



WAV
%

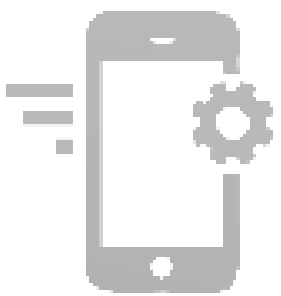
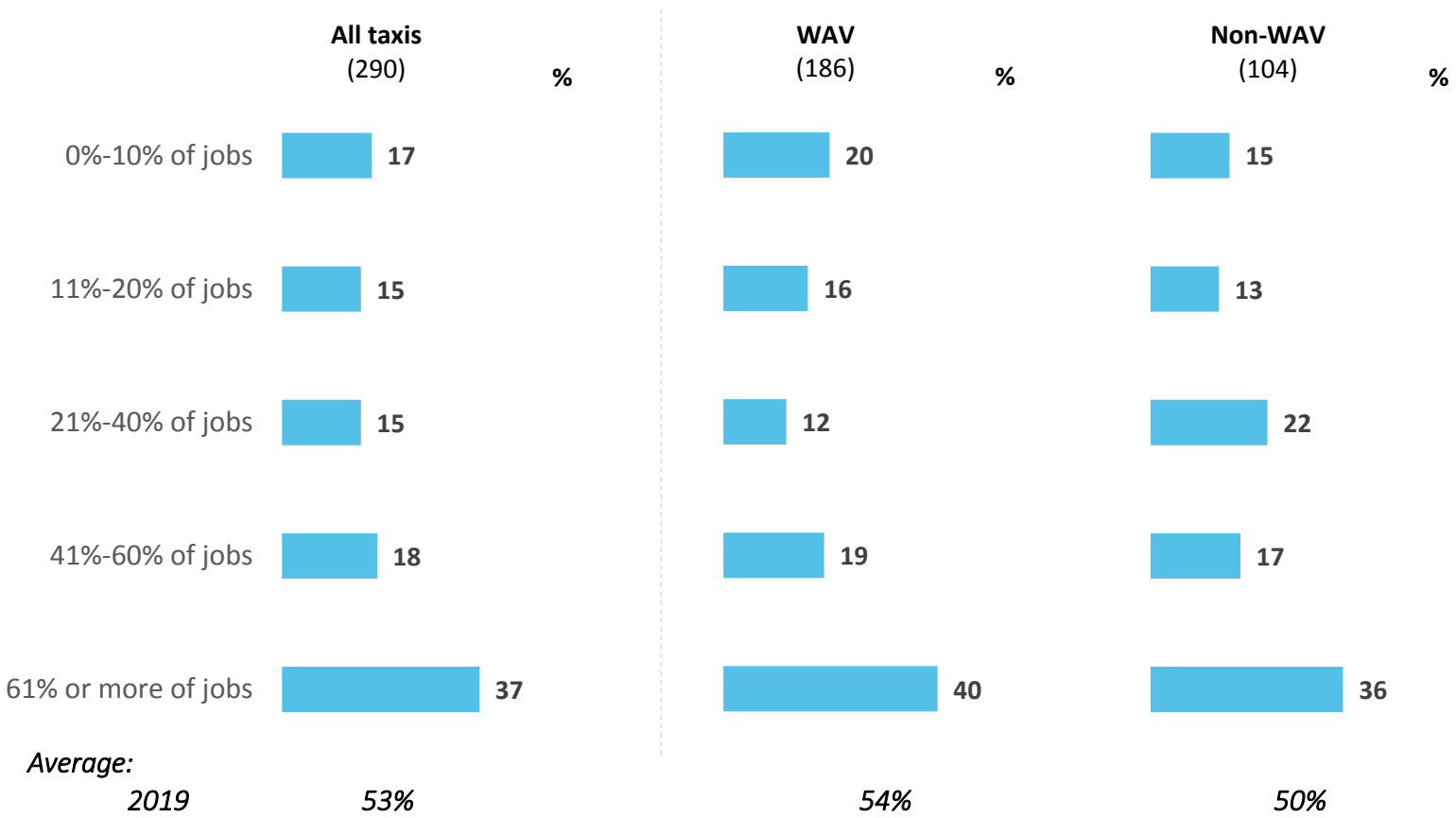


Non-WAV
%



Source of weekly jobs: smartphone app

Base: 290 ever get work via an app

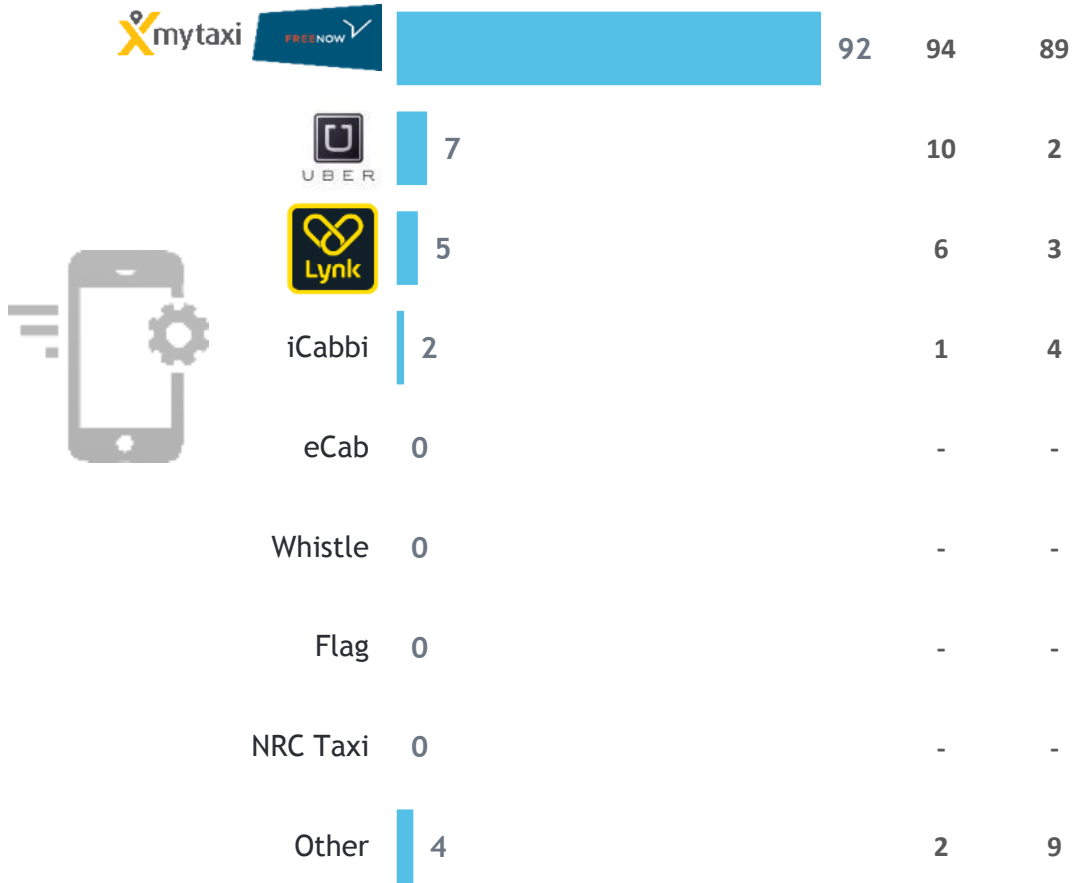


Marginally higher proportion of jobs come from smartphone apps for WAV drivers than non-WAV: stands to reason, given WAV more likely to be affiliated with them.

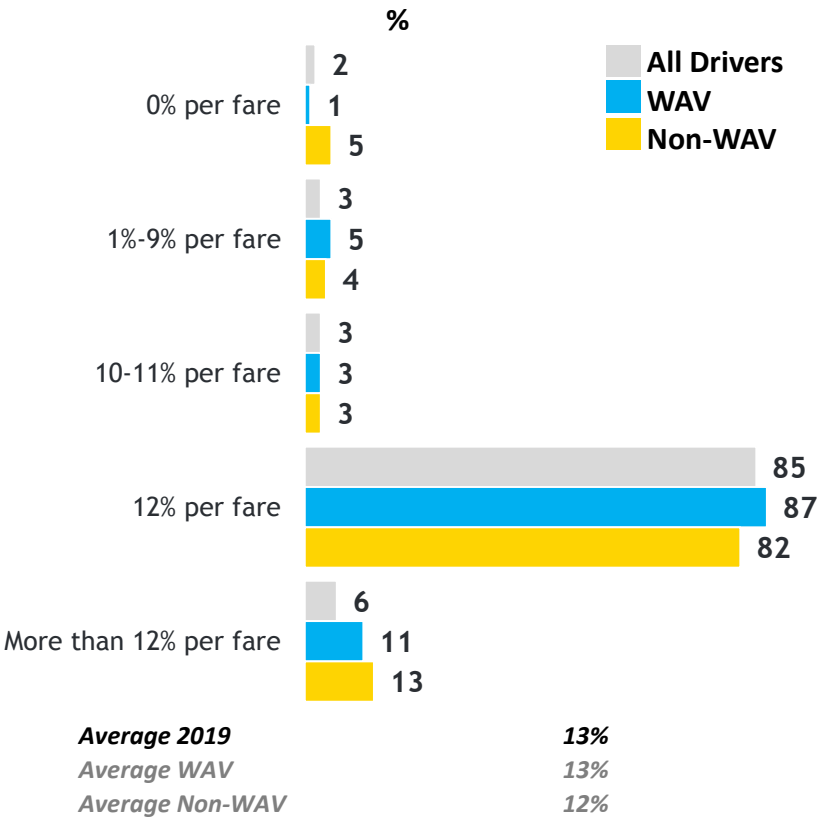
Smartphone apps summary

Base: 290 taxi drivers use app provider

Smartphone apps used



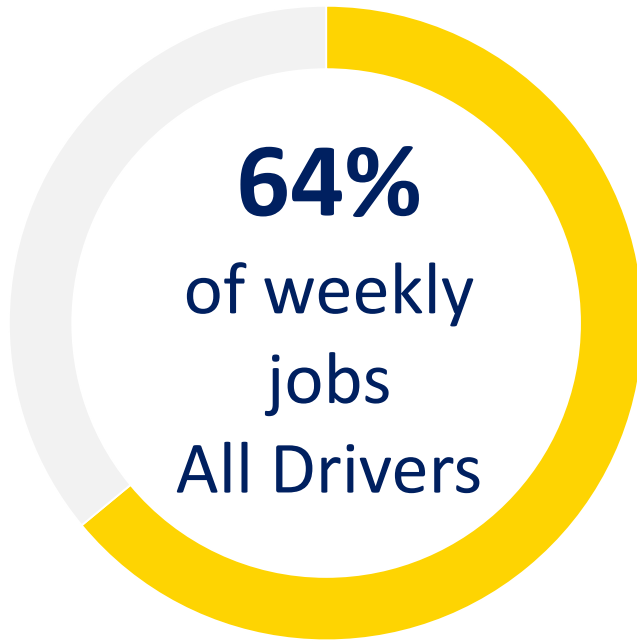
Percentage of each fare charged by app provider



WAV drivers marginally more likely to claim they are paying more than 12% per fare, resulting in their average per fare being marginally higher than that of Non-WAV drivers.

Average weekly jobs via dispatch company

Base: 105 taxi drivers ever get work via dispatch company

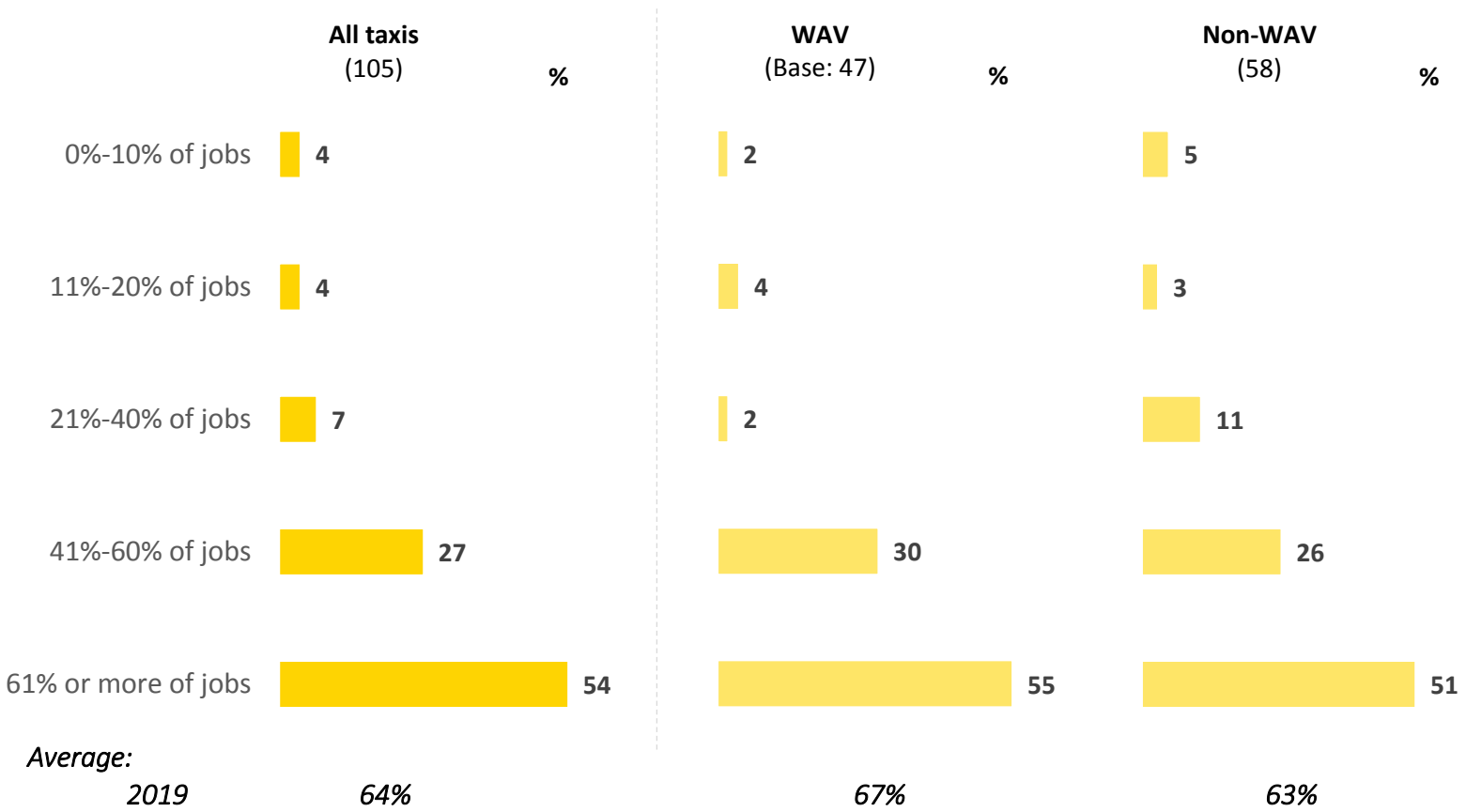


66% WAV
63% Non-Wav

Average proportion of weekly jobs sourced via dispatch among those who use them remains stable at 64%.

Source of weekly jobs: dispatch company

Base: 105 taxi drivers ever get work via dispatch company

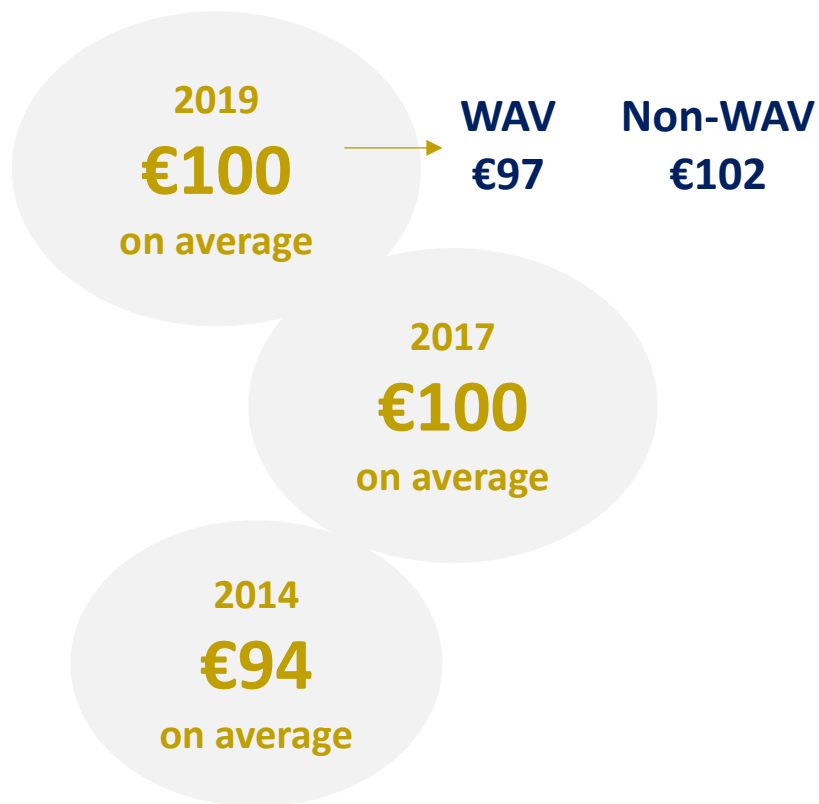


Marginally higher proportion of weekly jobs come from dispatch company among WAV taxi drivers who are affiliated with one.

Dispatch company summary

Base: 105 taxi drivers ever get work via dispatch company

Average weekly fee charged



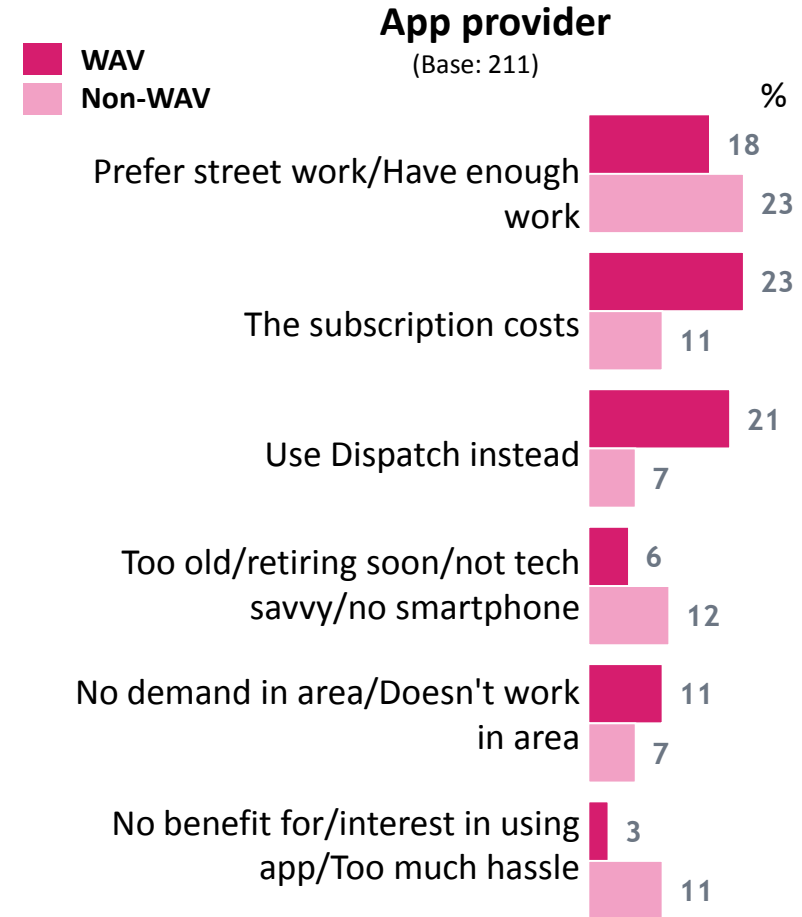
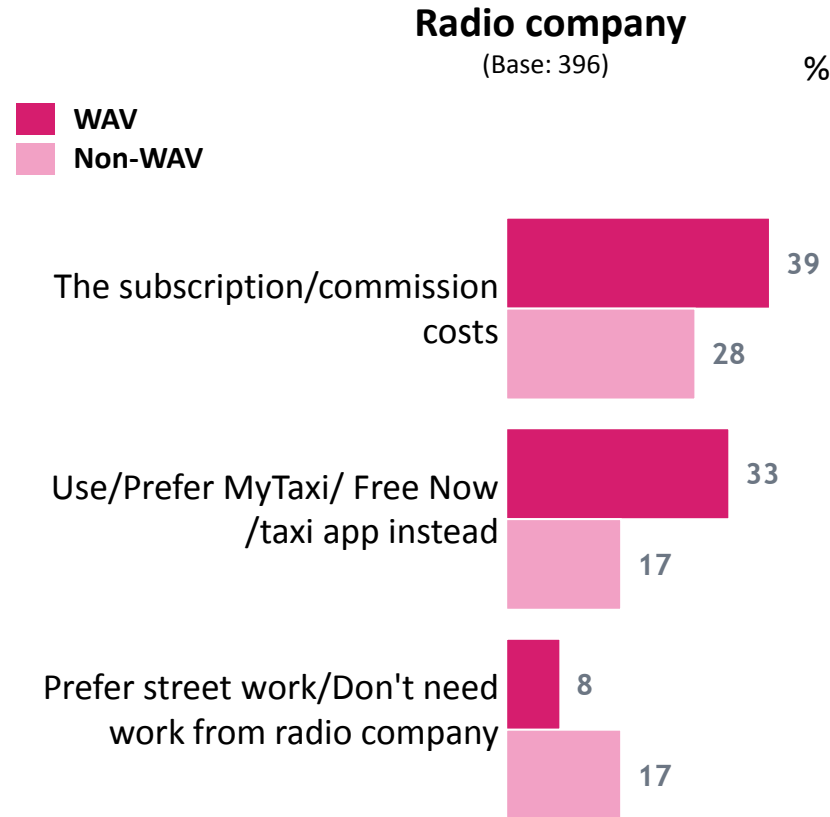
Does company ever offer discounted fares?



The average weekly fee charged by dispatch companies remains unchanged vs. 2017 (€100). Meanwhile, the proportion claiming their dispatch company offers discounted fares is marginally higher among WAV taxi drivers.

Most common reasons for not using...

Base: Taxi drivers use do not use dispatch company/app provider



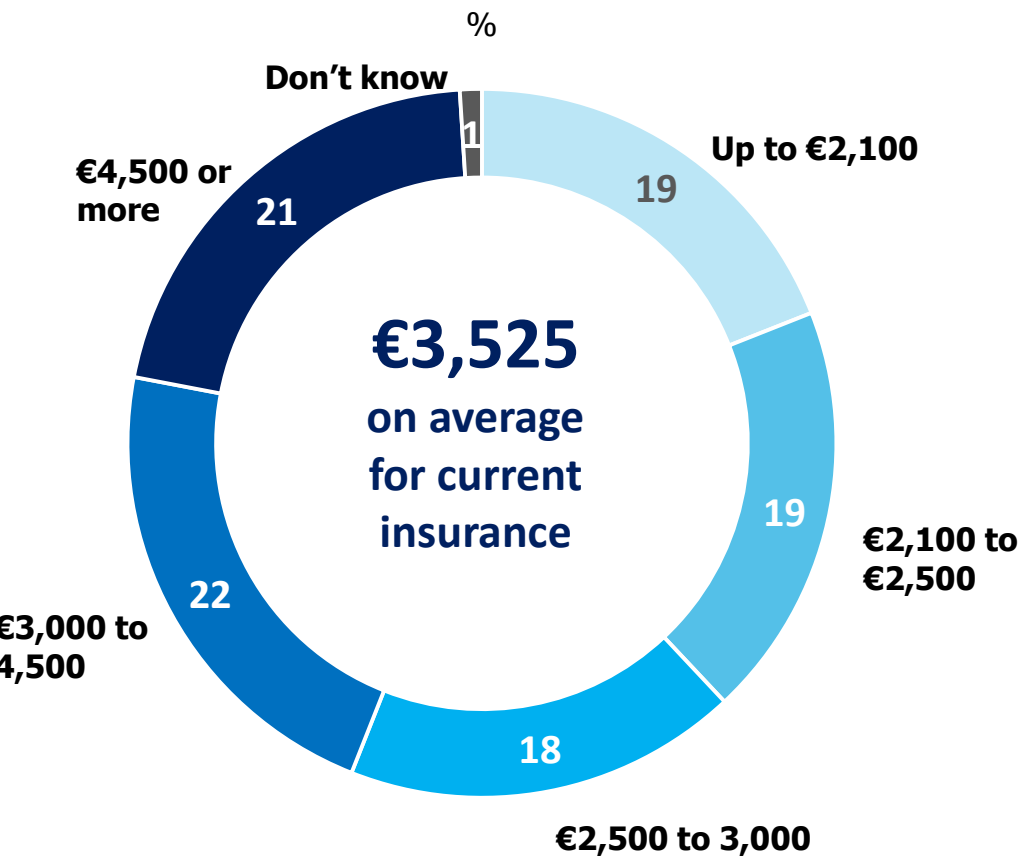
Non-WAV drivers who do not use radio companies and/or app providers are more likely to claim they prefer street work than WAV drivers. Costs a more significant barrier for WAV drivers.



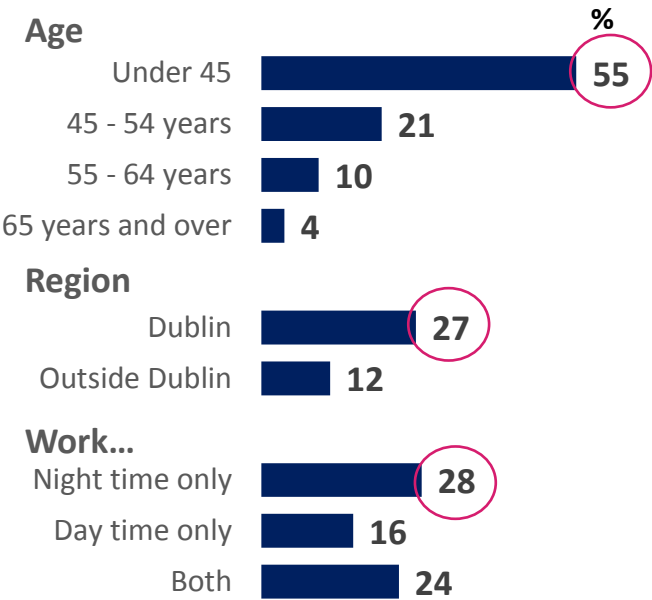
**Maintenance & running
costs**

Cost of insurance for most recent renewal

Base: All Taxi drivers: 501



Paid €4,500 or more

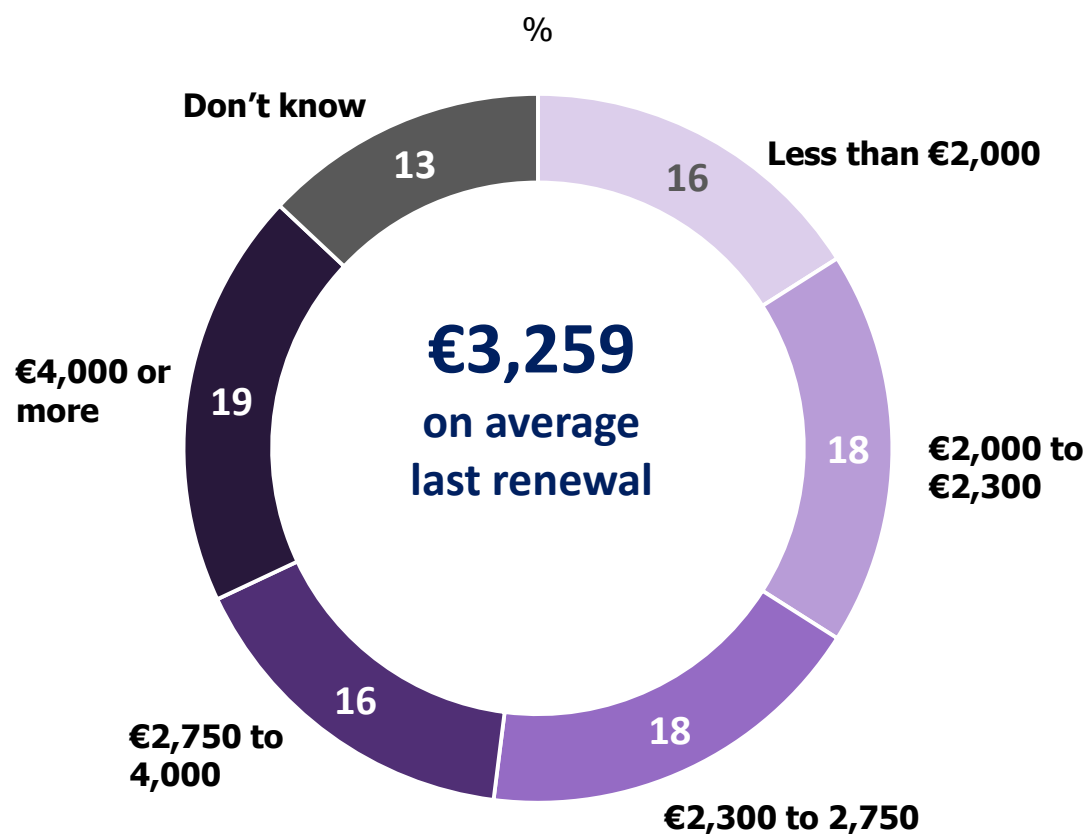


| | Average € |
|----------------|-----------|
| Dublin | €3,835 |
| Outside Dublin | €3,087 |

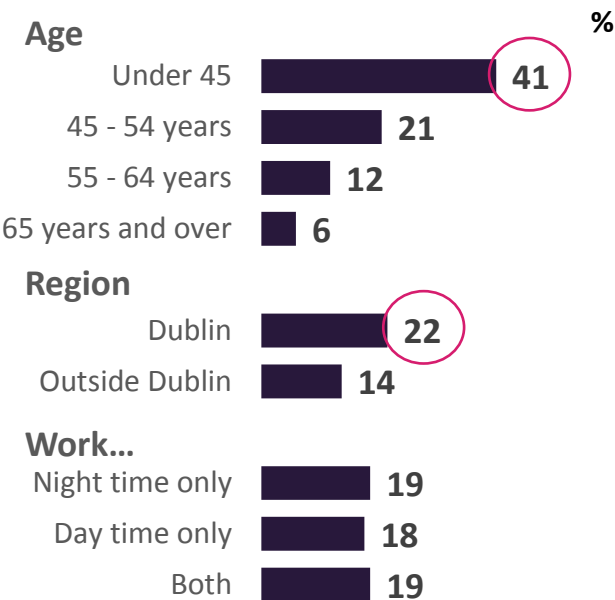
Driving experience is the key factor for calculating insurance premiums. In the 2017 survey only 4% of drivers had less than 5 years SPSV experience and the average premium was €2,248. In this survey, 24% had less than 5 years experience, giving rise to a higher average premium. The Taxi Cost Index balances this difference.

Cost of insurance last renewal

Base: All Taxi drivers: 501



Paid €4,000 or more

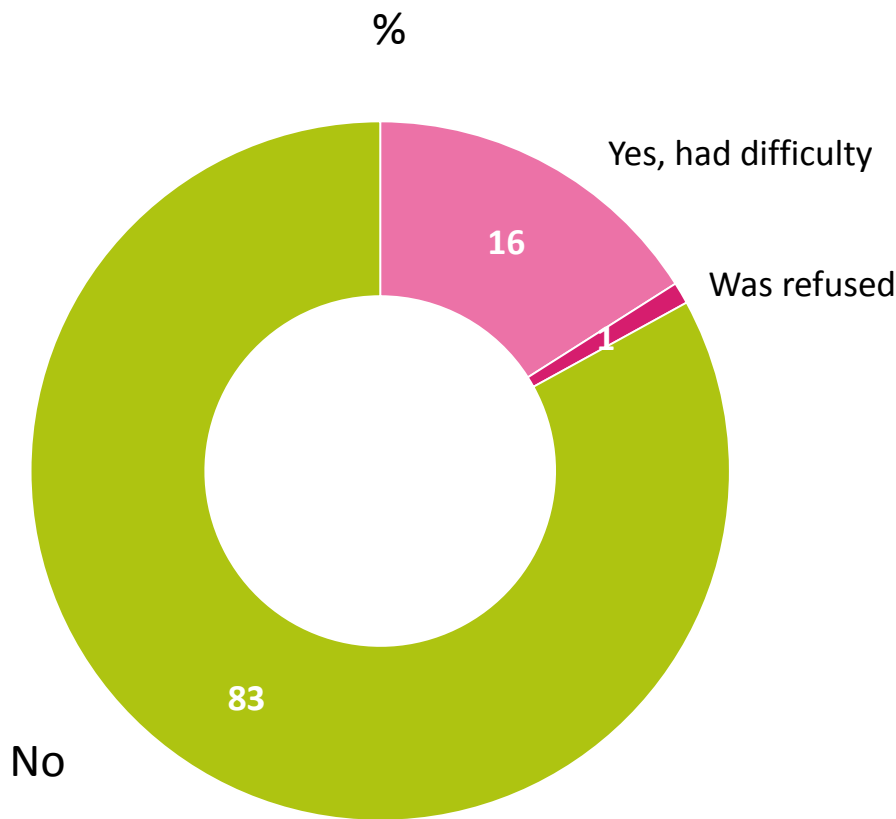


| | Average € |
|----------------|-----------|
| Dublin | €3,537 |
| Outside Dublin | €2,902 |

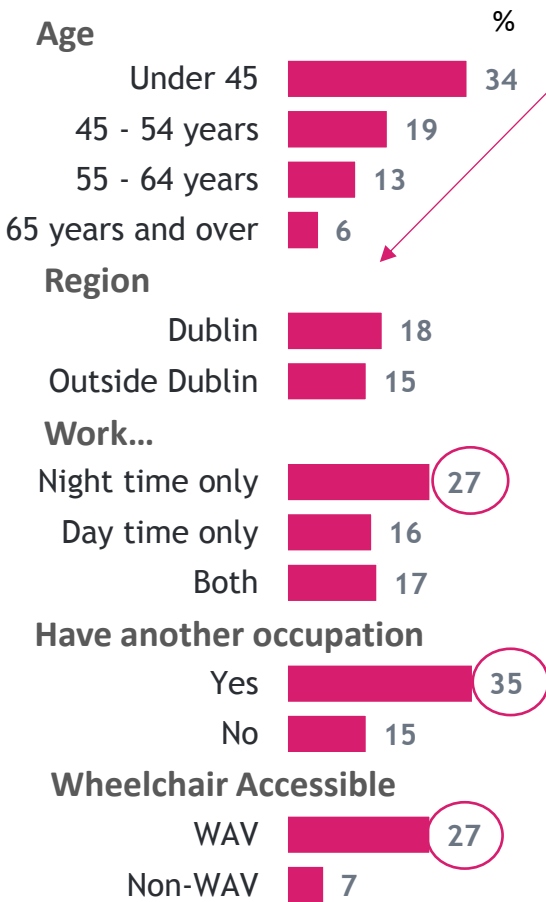
The average claimed to have been paid for last year's insurance premium is €3,259, which is not far off the average for the most recent premium paid at €3,525 in this survey. As with the previous slide, it is important to note that **24%** of these drivers had less than 5 years SPSV driving experience, whereas in the 2017 survey that figure was only 4%.

Difficulty getting insurance when last renewed

Base: All taxi drivers: 501



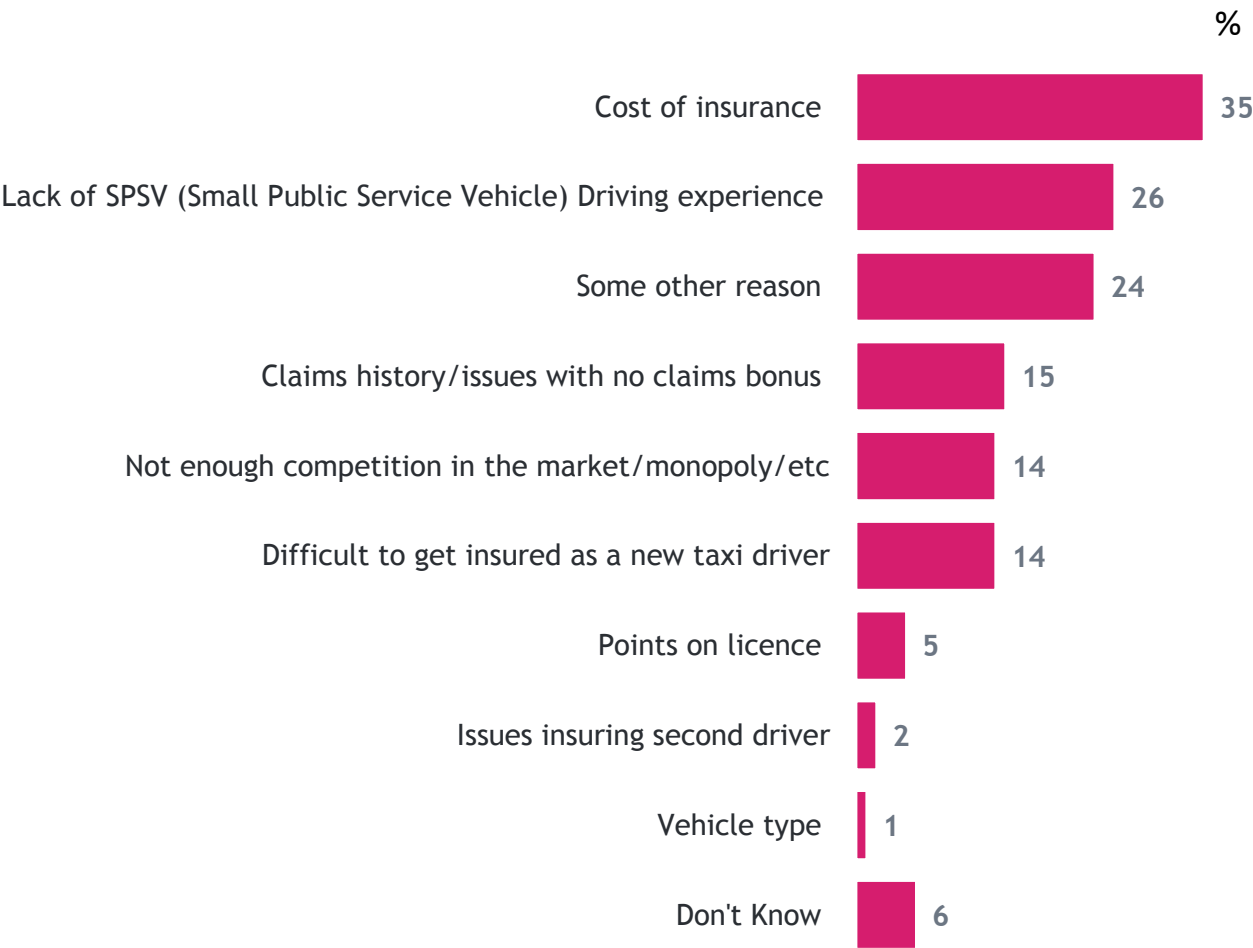
Any Difficulty/Refused



1 in 6 (17%) had difficulty or were refused insurance last time around. Proportion rises to a third of those under 45 (34%), a third of those with another occupation (35%), a quarter of those work nights only (27%) and a quarter (27%) of WAV taxi drivers.

Reasons had difficulty/were refused insurance

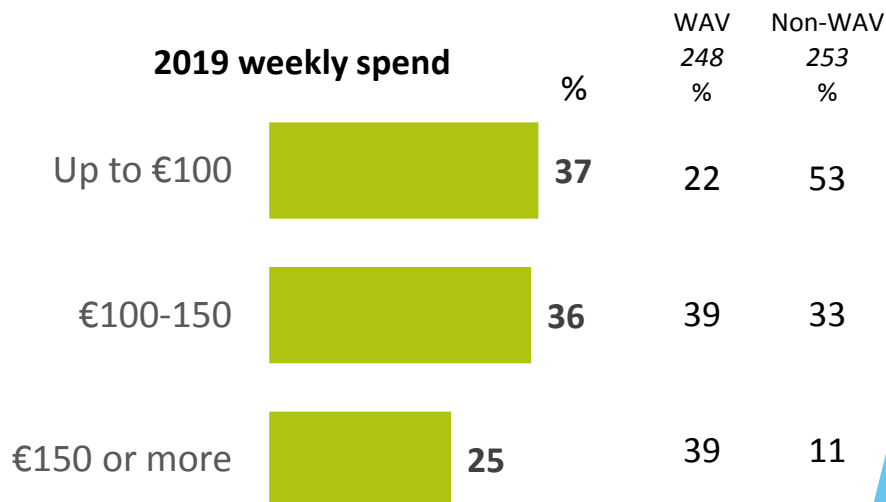
Base: 85 Taxi drivers had difficulty/were refused insurance



Overall, cost was a key issue for those who had difficulty/were refused insurance (35%), followed by lack of SPSV (26%).

Average weekly spend on fuel

Base: 501 taxi drivers



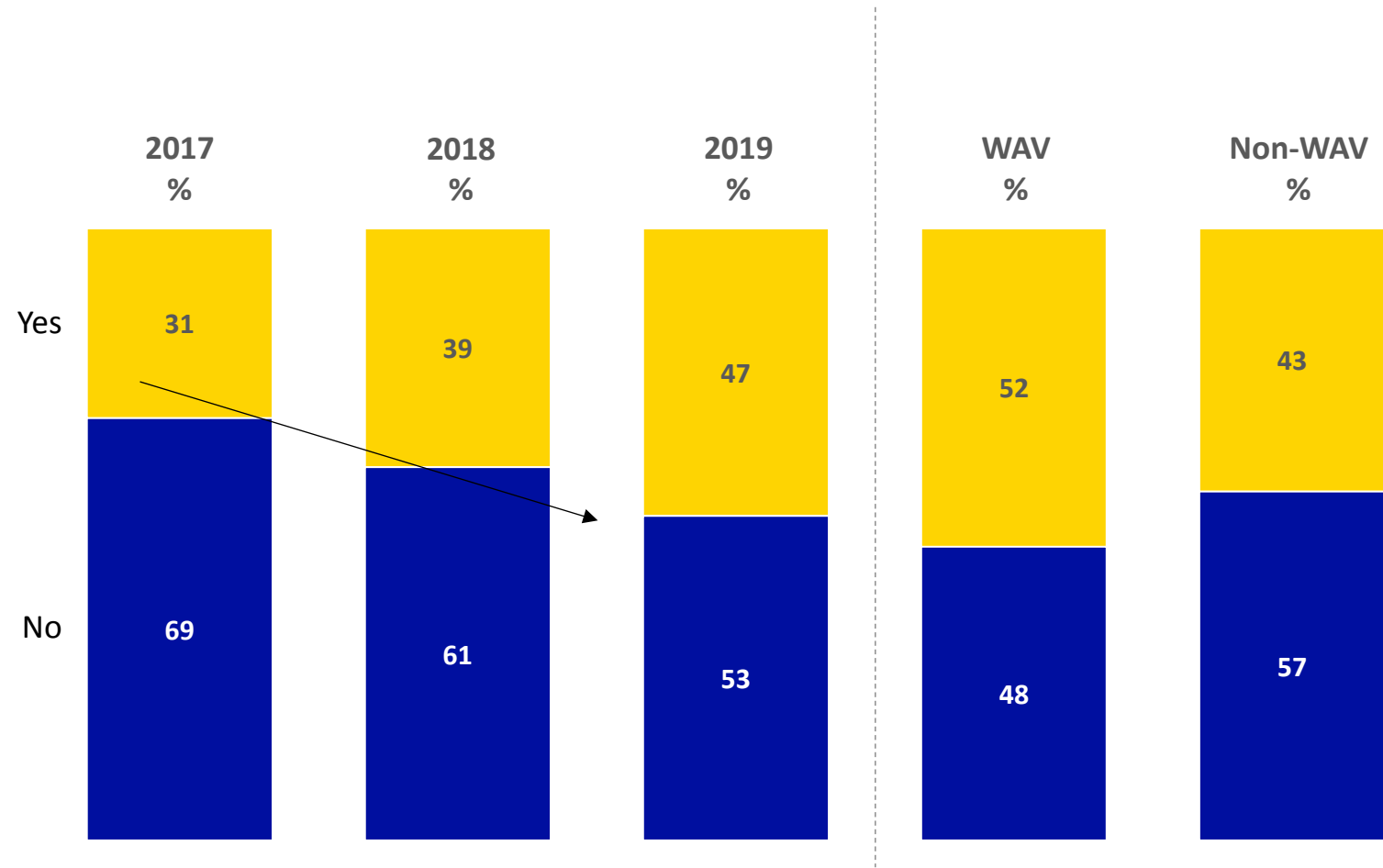
**Average spend on fuel
per week:**

All Drivers: €116
WAV: €137
Non-WAV: €95

| | 2014 | 2017 | 2019 |
|-----------------------------|------|------|------|
| All Taxi Drivers | €119 | €103 | €116 |
| Dublin Taxi Drivers | €119 | €107 | €116 |
| Taxi Drivers Outside Dublin | €118 | €96 | €115 |

Loan/Car Finance

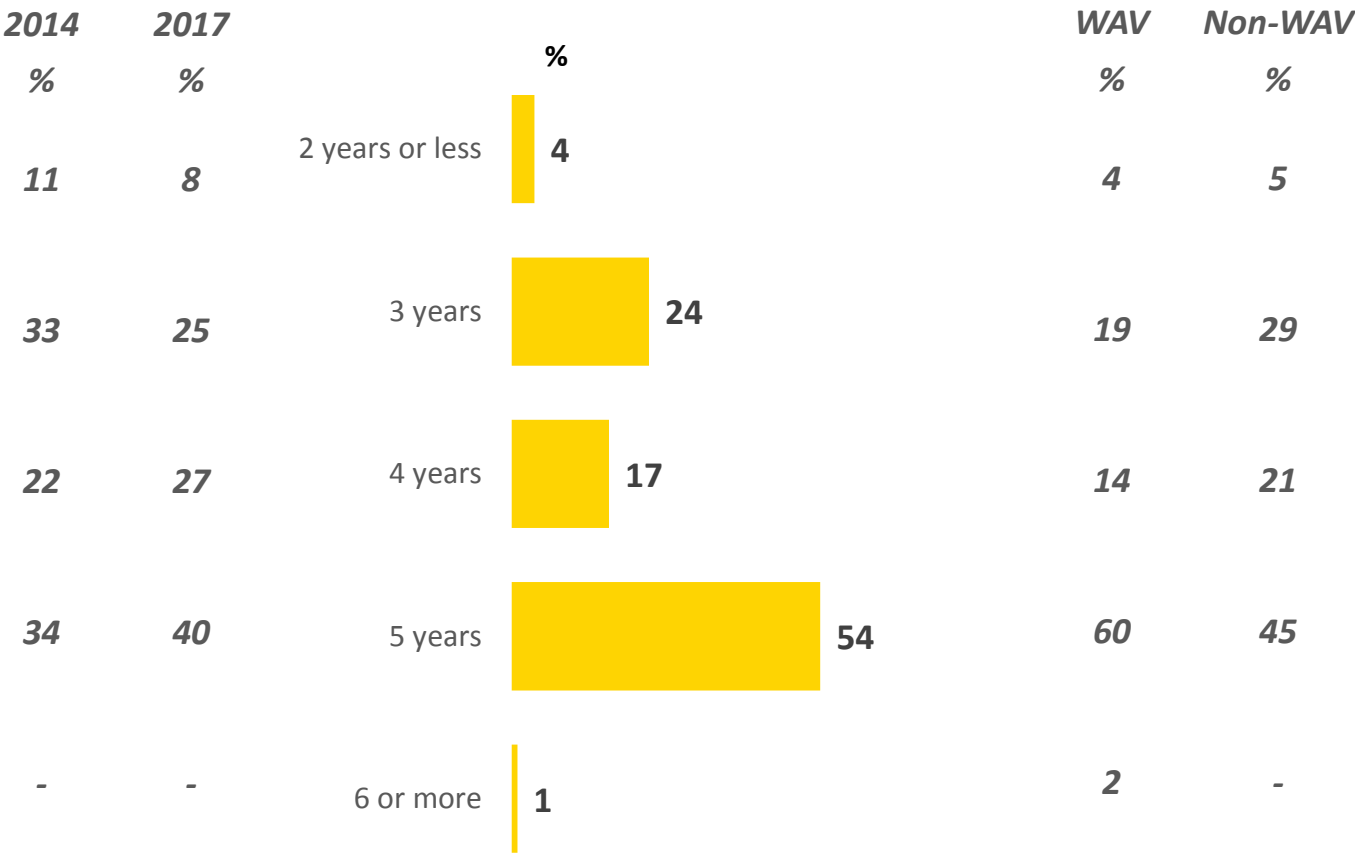
Base: 496 Taxi drivers own their taxi



Consistent increase in the proportion of taxi drivers who have a loan/car finance for their car: now stands at almost half (47%). WAV drivers more likely to have car finance than non-WAV: remember they are also more likely to have purchased their vehicle new.

Term/Period the loan was for

Base: 496 Taxi drivers own their taxi



Terms of finance appear to be longer nowadays: 55% of those with a loan had a term of 5 years or more this year (vs. 40% in 2017 and 34% in 2014). This appears to be driven by WAV drivers with finance, 62% of whom have a 5+ year term.

Servicing summary: WAV

Base: All Taxi drivers: 501

Frequency of full service

Average kms driven per year

Average number per year

14,960kms
on average 2019

51,416 kms
on average 2019

3 per year
on average 2019

Average cost of full service

Average number per year

Average cost per year

€232
on average 2019

3 per year
on average 2019

€696 per year
on average 2019

On average, WAV drivers claim to have their vehicles serviced 3 times per year at €232 per service.

Servicing summary: Non-WAV

Base: All Taxi drivers: 501

Frequency of full service

Average kms driven per year

Average number per year

14,652kms
on average 2019

40,680kms
on average 2019

3 per year
on average 2019

Average cost of full service

Average number per year

Average cost per year

€221
on average 2019

3 per year
on average 2019

€663 per year
on average 2019

Non-WAV drivers claim to service their vehicles serviced a similar number of times per year on average, but at a marginally lower cost (€221).

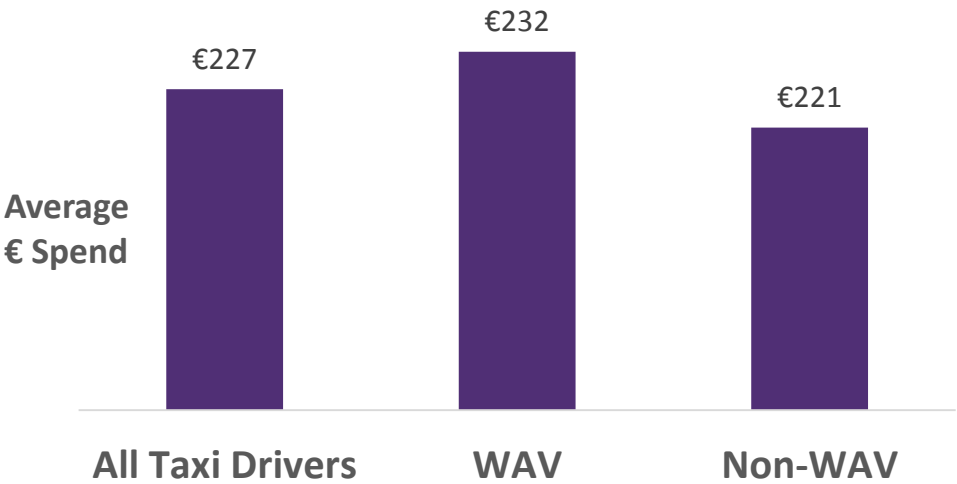
Full service: Dublin vs. Outside Dublin

Base: All Taxi drivers: 501

Frequency of full service



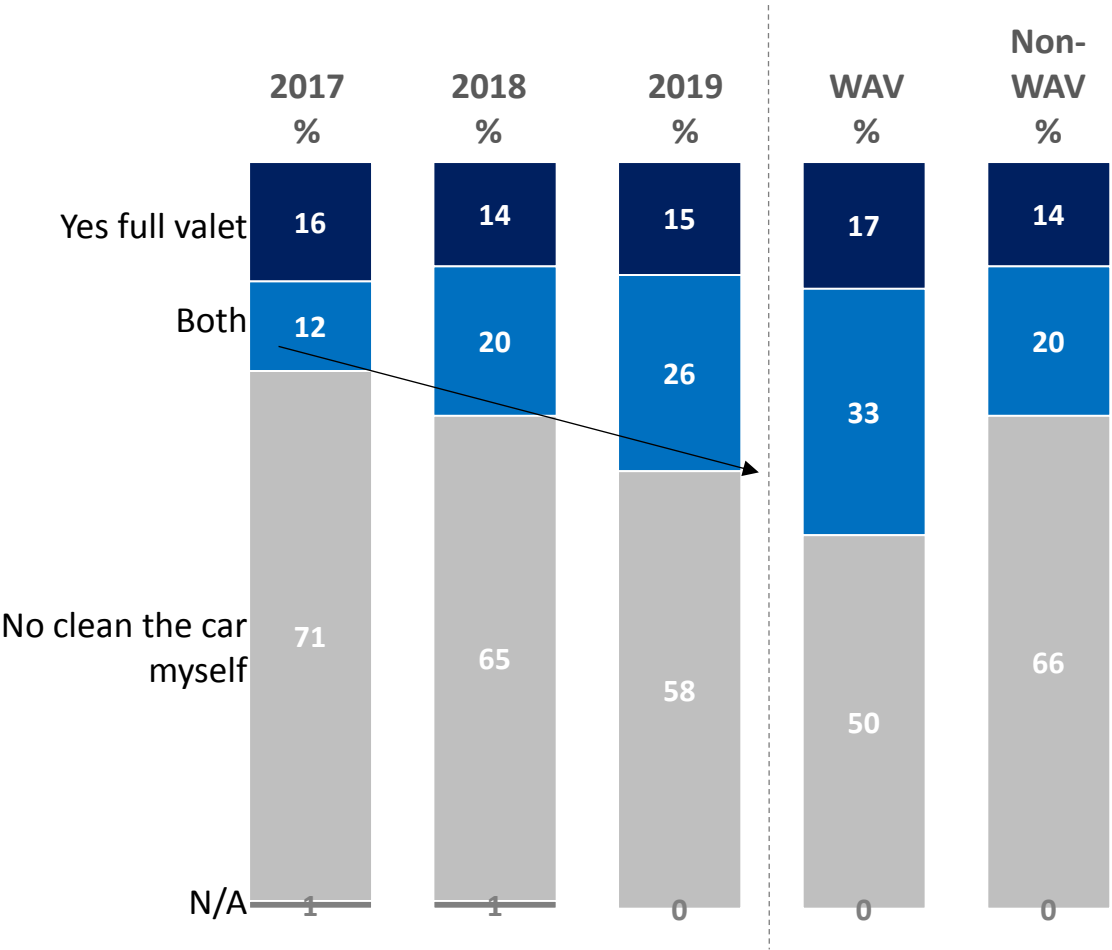
Cost of full service



Non-WAV drivers claim to drive fewer kilometres before a service than WAV, while WAV drivers claim a higher cost per service.

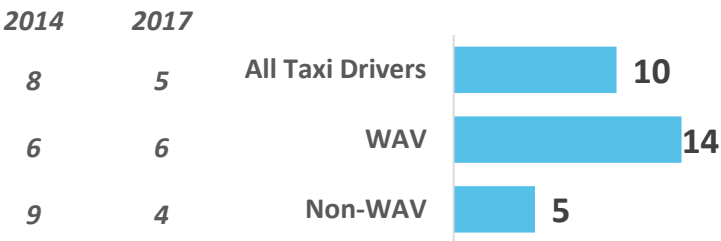
Full valet service

Base: 501 taxi drivers



Average number per year

Base: 77 taxi drivers ever get valet



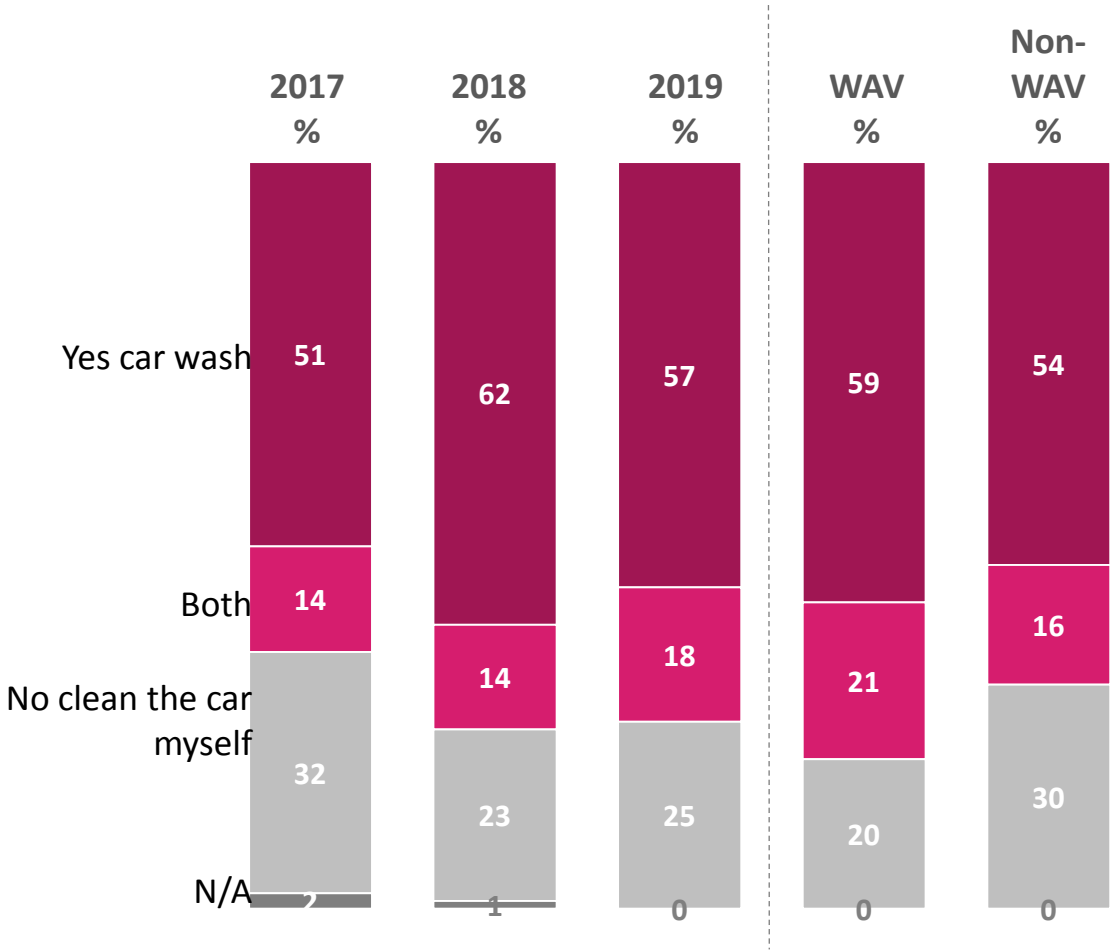
Average cost of full valet



WAV drivers more likely to ever have a full valet service than non-WAV. Not only that, but those WAV drivers who do, have a valet more frequently than their non-WAV driver counterparts. Similar cost reported by both.

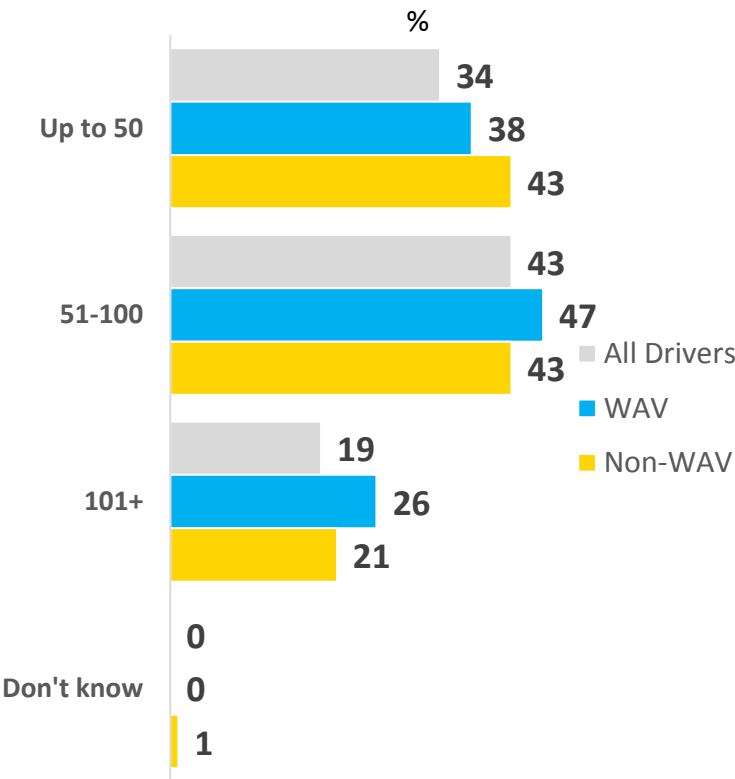
Car wash

Base: 501 taxi drivers



Average number per year

Base: 375 taxi drivers ever use car wash



Again, WAV drivers more likely to use the car wash than Non-WAV drivers. They are also more likely to have more than a 100 car washes in a year than Non-WAV drivers.

Average cost of car washes

Base: 375 taxi drivers ever use car wash



€9

per car wash
2019

€10

WAV

€9

Non-WAV

Number of Car Washes per year

| | |
|---------|----|
| WAV | 70 |
| Non-WAV | 63 |

**67 car washes on
average per year**

€9 on average
per car wash

**€603 car wash spend
on average per year**

Spend on Car Washes per year

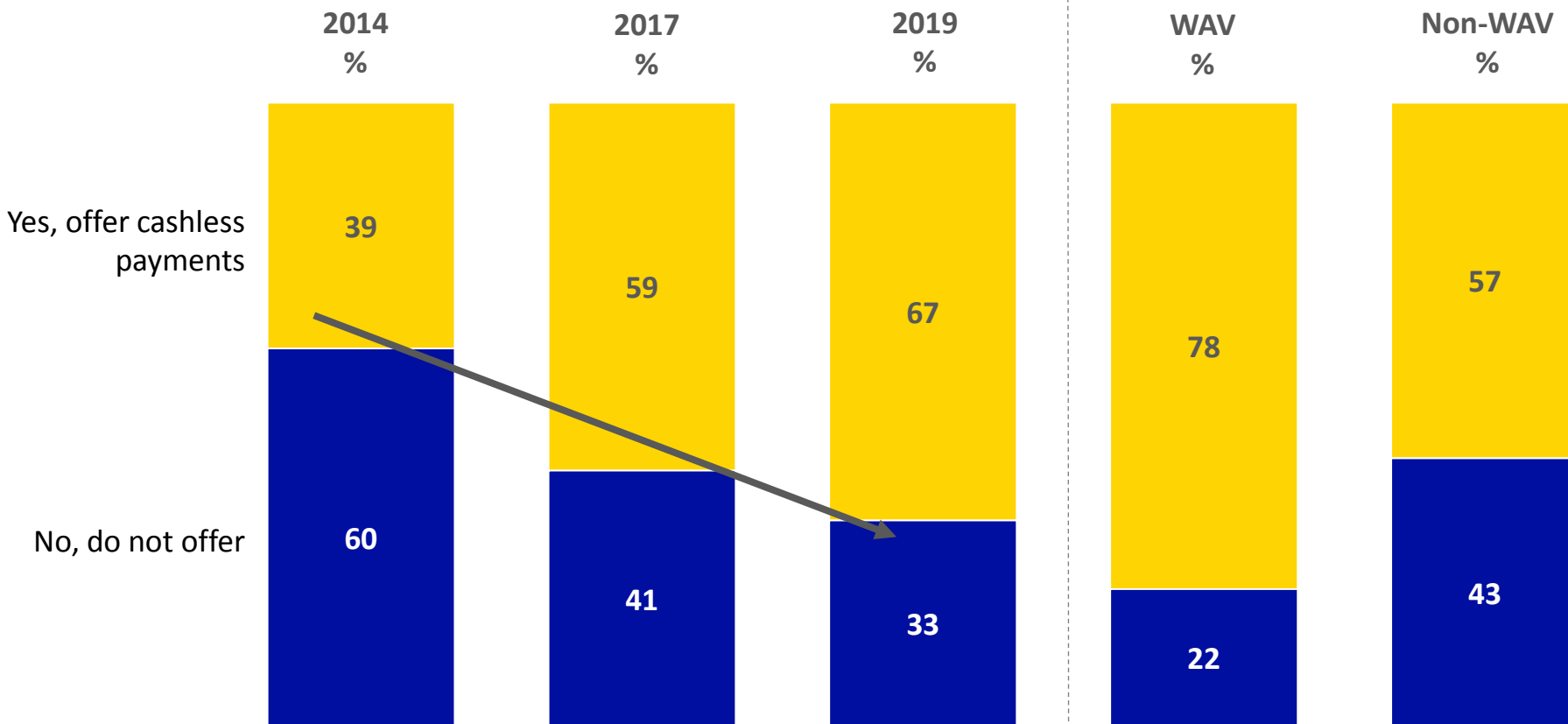
| | |
|---------|------|
| WAV | €700 |
| Non-WAV | €567 |



Payments & discounts

Incidence of cashless payments

Base: 501 taxi drivers



The proportion of taxi drivers offering cashless payments increasing; +8% pts vs. 2017, with two thirds now offering cashless payments. WAV drivers much more likely to offer cashless payments than non-WAV drivers.

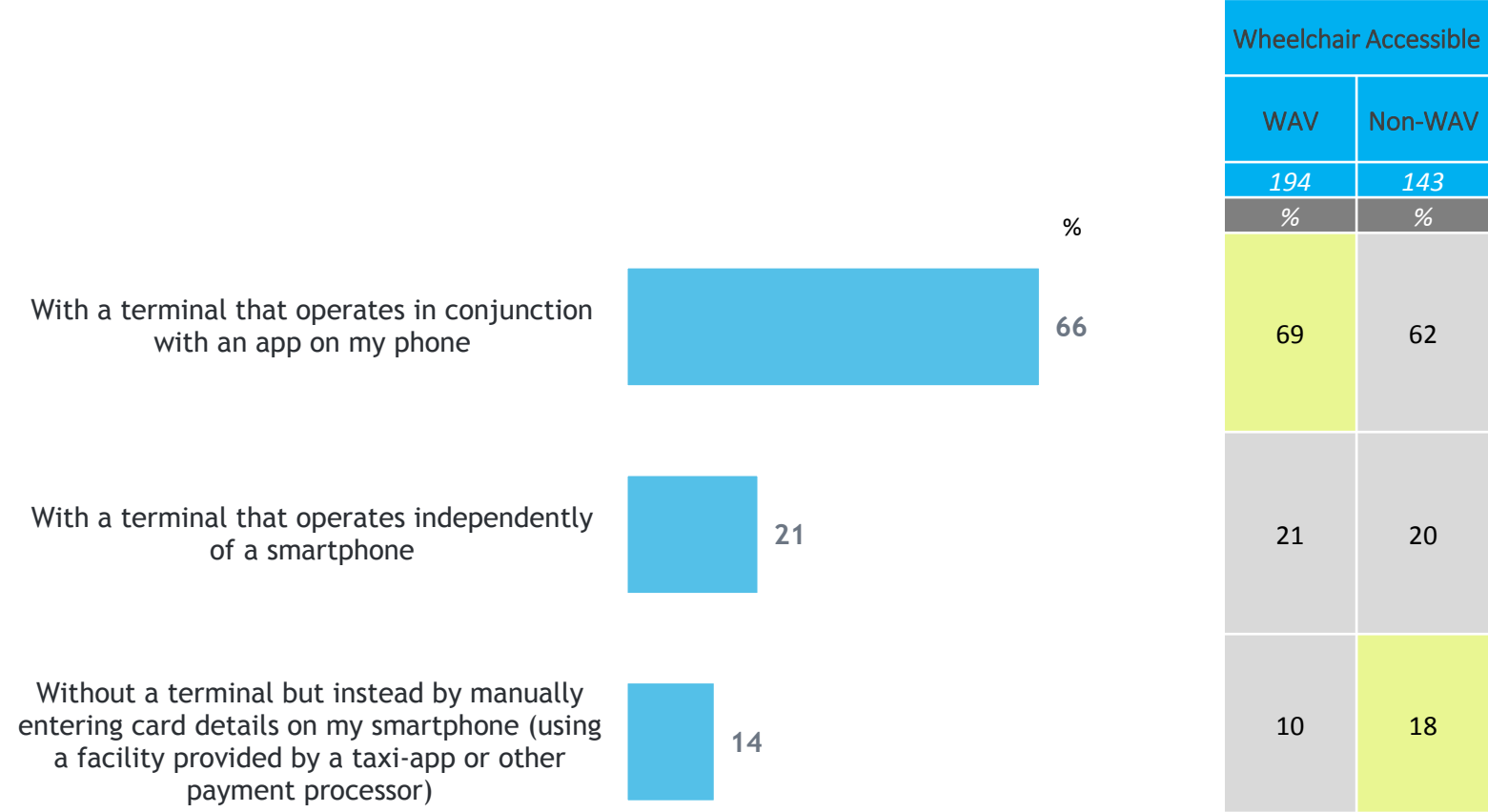


***Almost 9 in 10
(88%) of those
who offer cashless
payments do so to
all passengers.***

***WAV: 92%
Non-WAV: 84%***

Who cashless payments are offered to

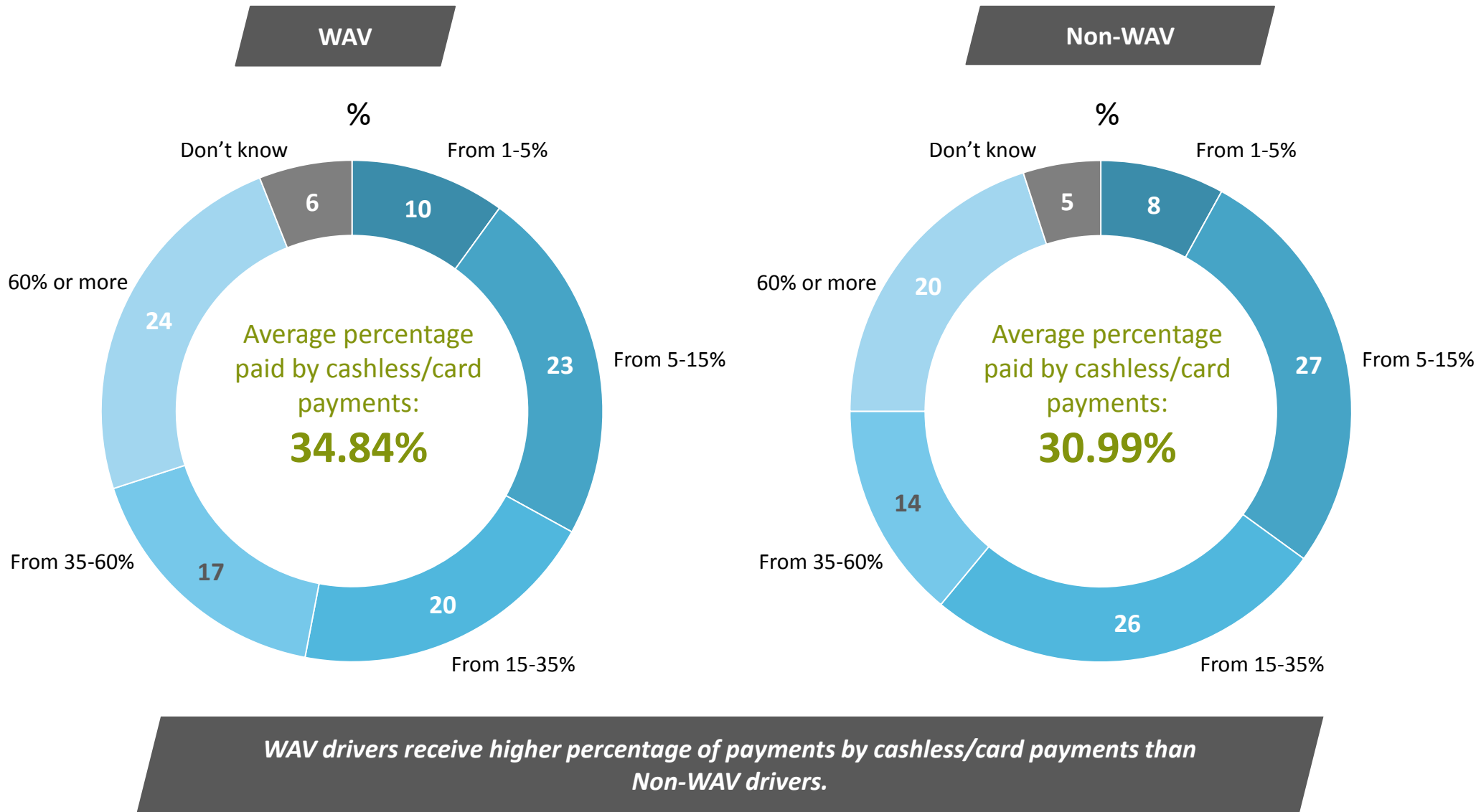
Base: 337 taxi drivers take cashless payments



WAV drivers more likely to mention a terminal that operates in conjunction with an app on their phone, while Non-WAV drivers more inclined to claim without a terminal but manually entering card details on their smartphone.

Proportion paid by cashless/card payment

Base: 337 taxi drivers take credit card/cashless payment





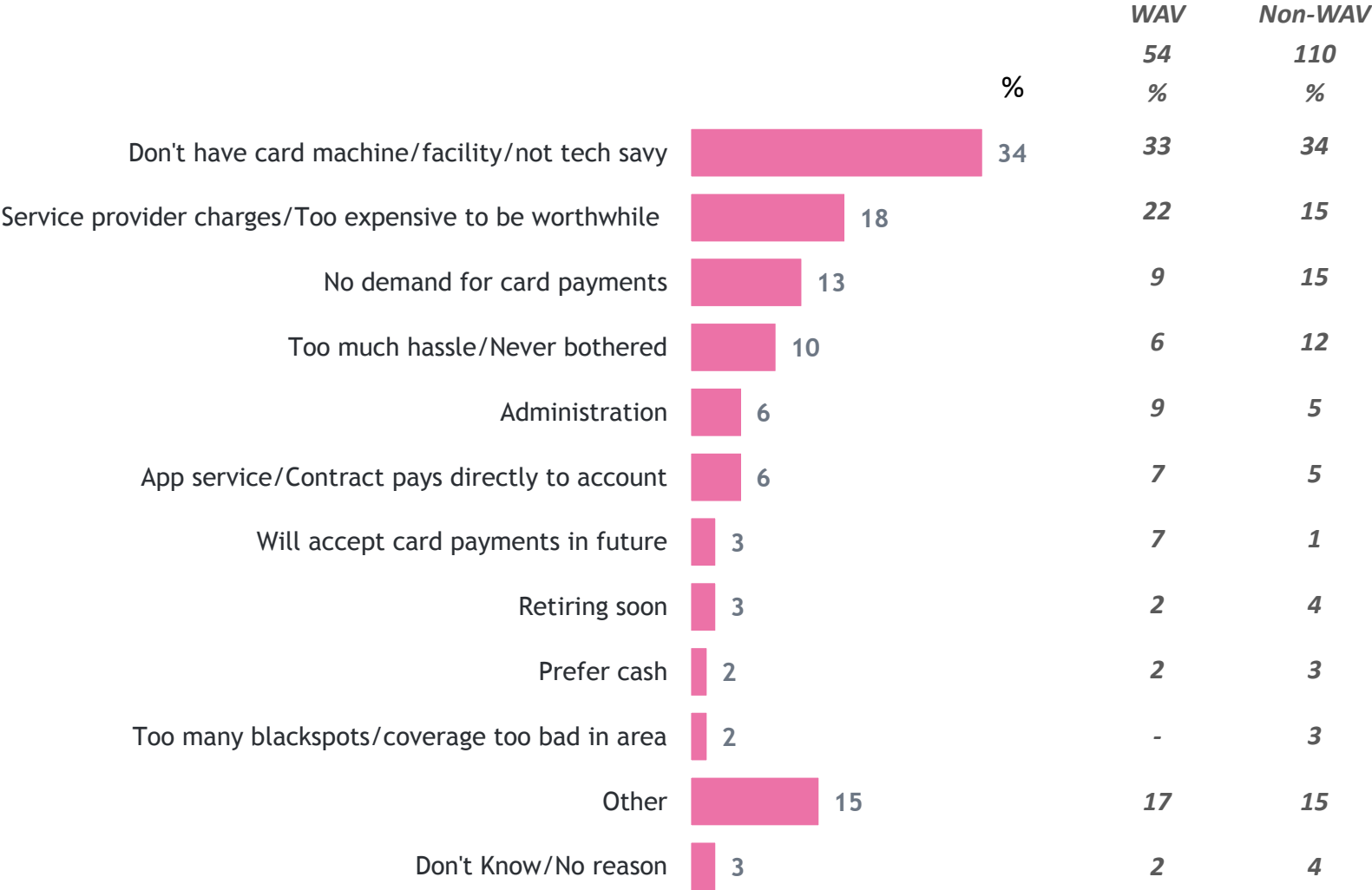
***Average service
charge paid to
credit card
provider in 2019:
3.43% ↓***

| | |
|---------|------|
| WAV | 3.54 |
| Non-WAV | 3.30 |

Reasons for not taking credit card/cashless payments



Base: 211 taxi drivers use do not use app provider

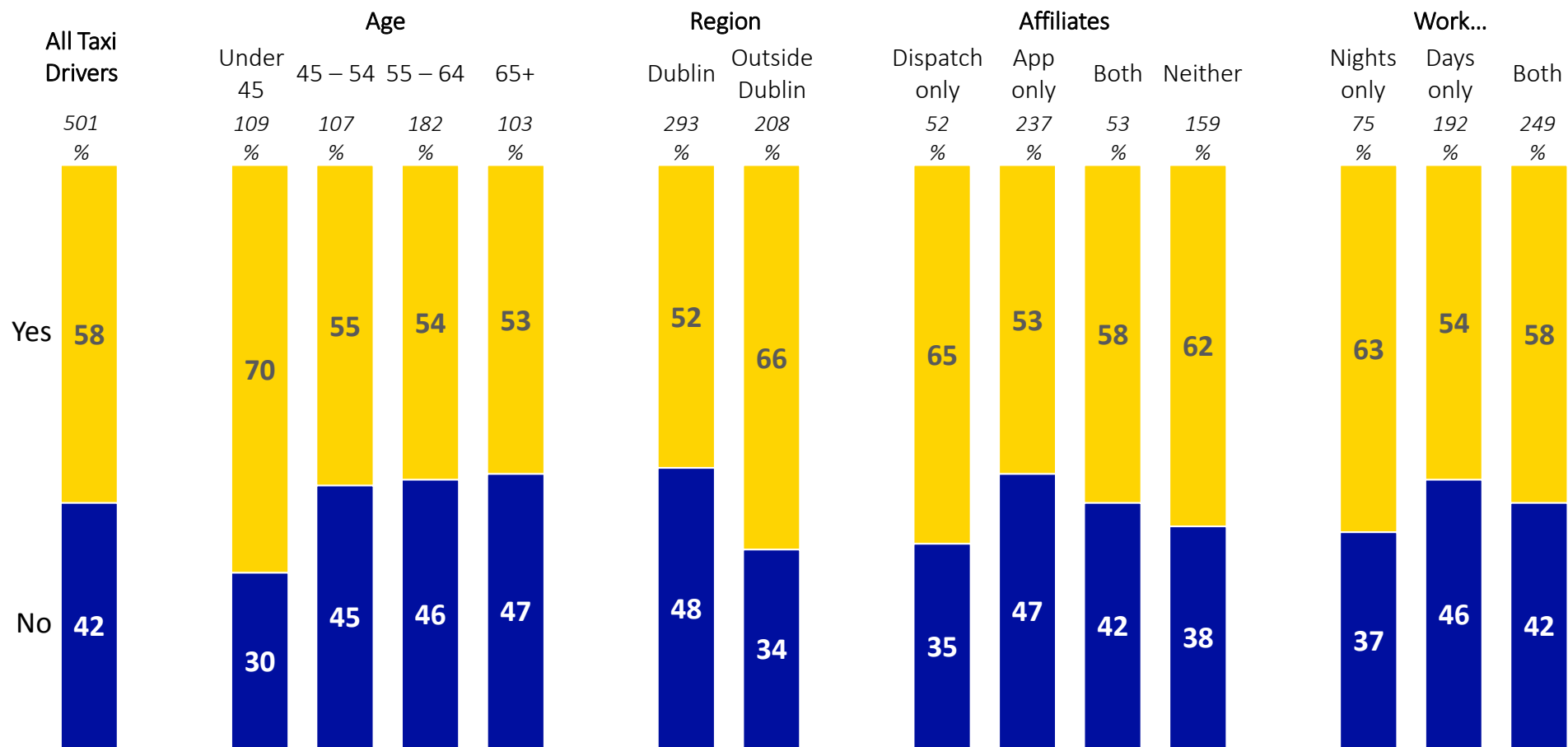


The most common reason given for not taking credit card/cashless payments is not having the machine/being tech savvy (34%), followed by charges/expense (18%).

Ever offer discounted fares to customers



Base: 501 taxi drivers

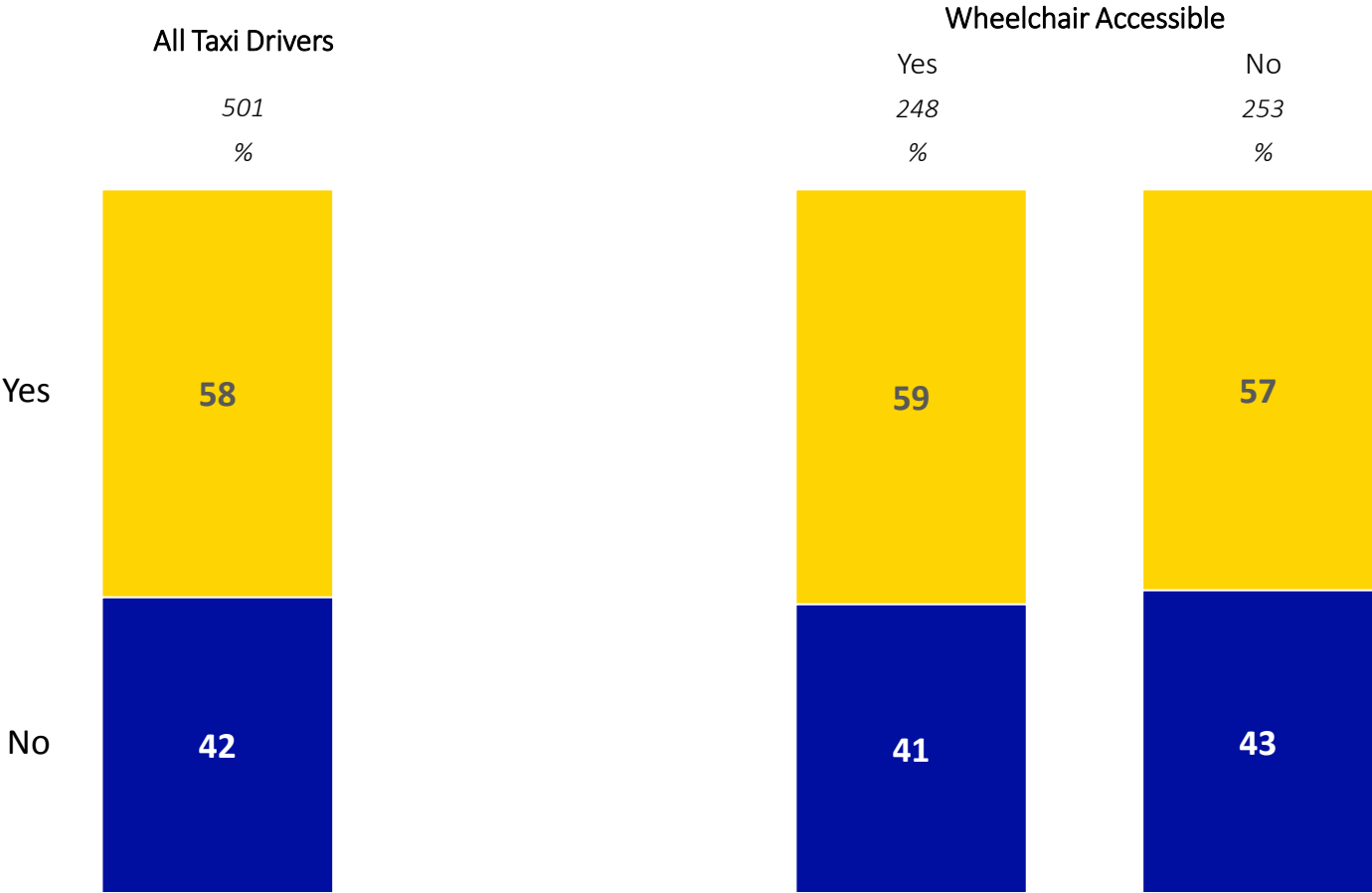


Overall, almost 3 in 5 (58%) ever offer discounted fares to customers. Higher among those under 45, those working outside Dublin, those who use dispatch but not apps, and those who work nights only.

Ever offer discounted fares to customers



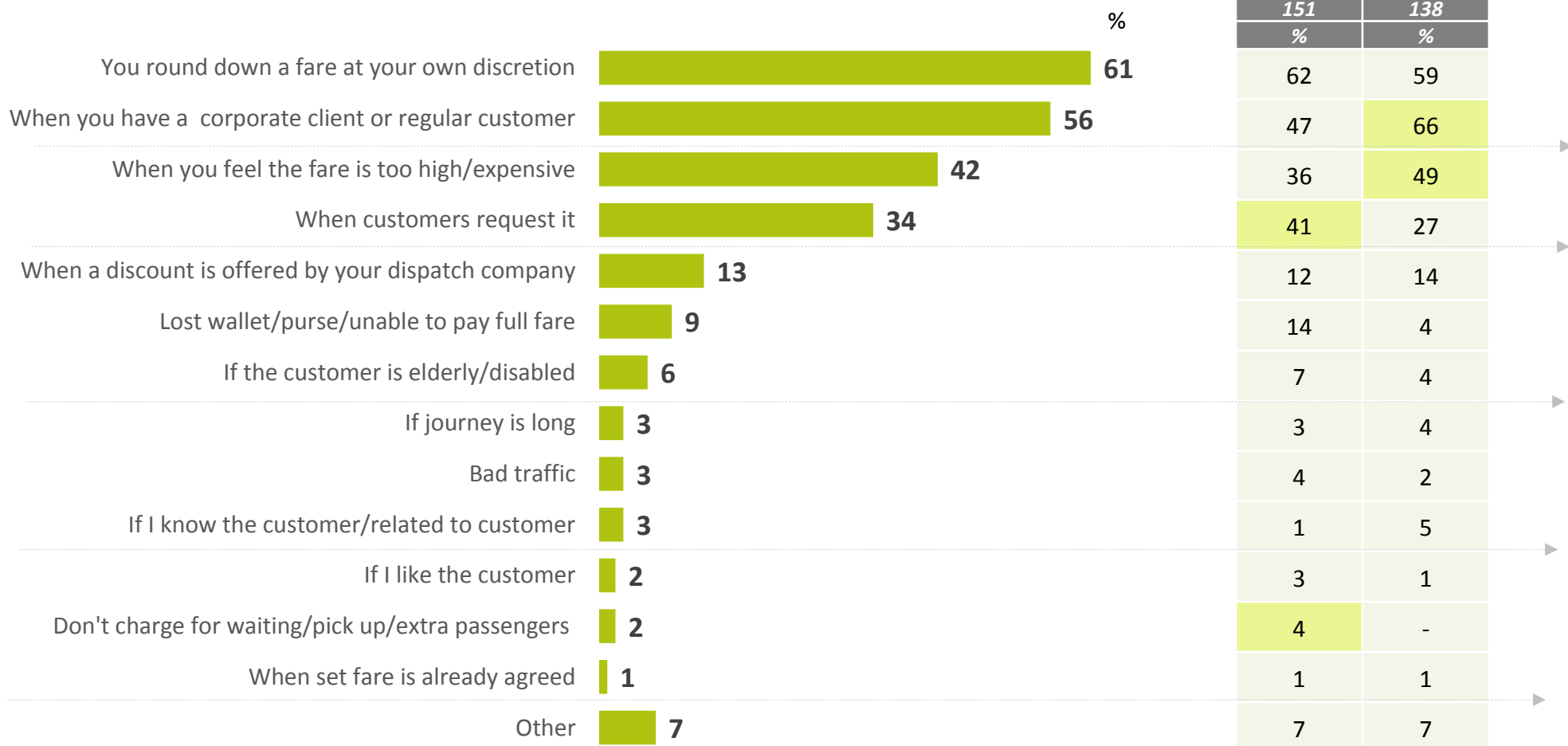
Base: 501 taxi drivers



No real difference by WAV and non-WAV drivers in terms of incidence of offering discounted fares to customers.

Occasions most likely to offer a discount

Base: 289 taxi drivers offer discounts

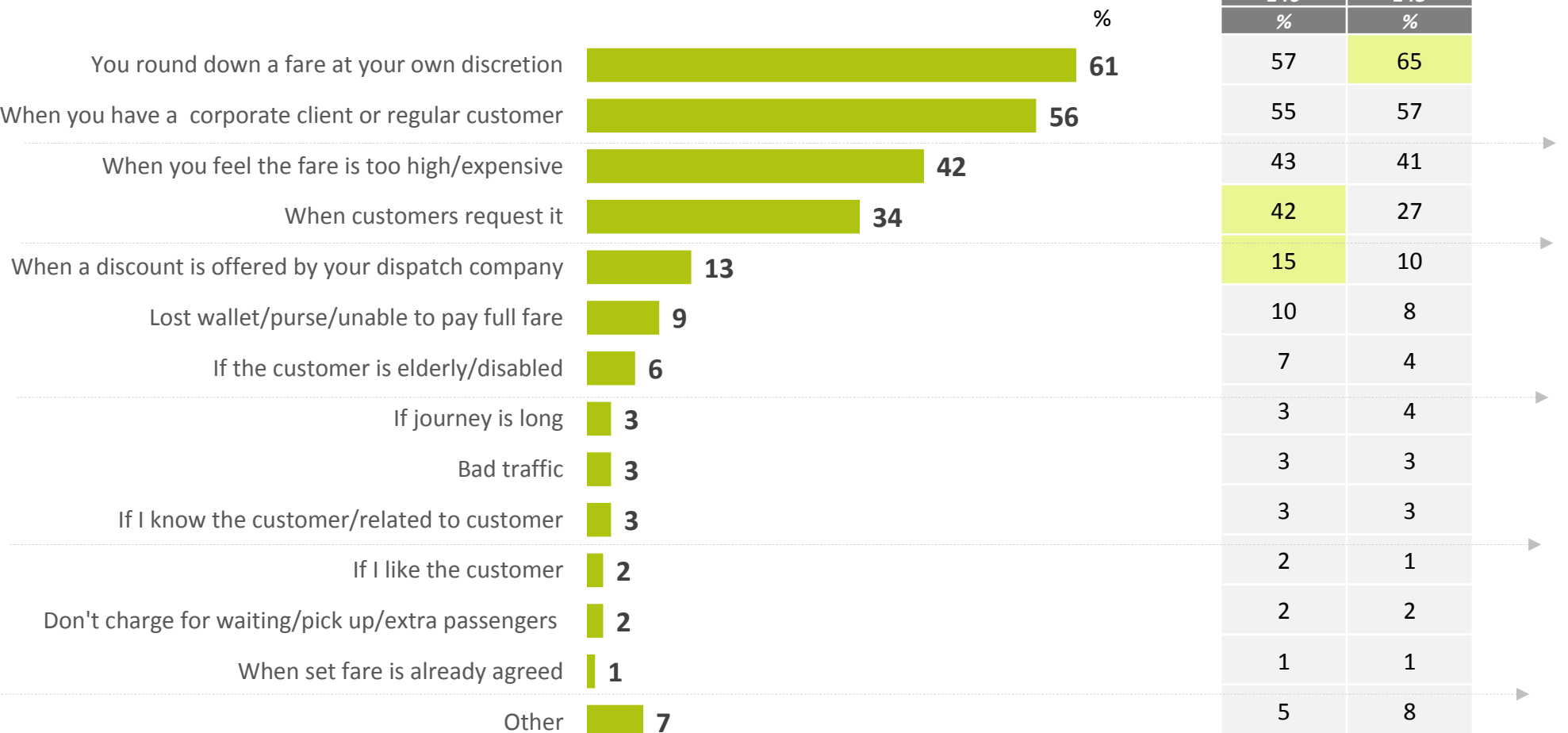


Overall, rounding down the fare at their own discretion is the most common reason for discounts mentioned (61%). Those outside Dublin more likely to mention when they have a corporate client or regular customer and/or when they feel the fare is too expensive, whereas those in Dublin are more likely to mention customers requesting a discount.

Occasions most likely to offer a discount: WAV v Non-WAV



Base: 289 taxi drivers offer discounts



Non-WAV drivers more inclined to mention rounding down fares at own discretion, while WAV drivers more likely than others to claim they offer discounts when the customer requests and/or when one is available from their dispatch company.



**Working hours &
income**



***On average, taxi drivers are
doing 46,000kms per
year.***

| | |
|---------|--------|
| WAV | 51,400 |
| Non-WAV | 40,600 |



***On average, taxi
drivers working
5.1 days;
44 hours
per week***

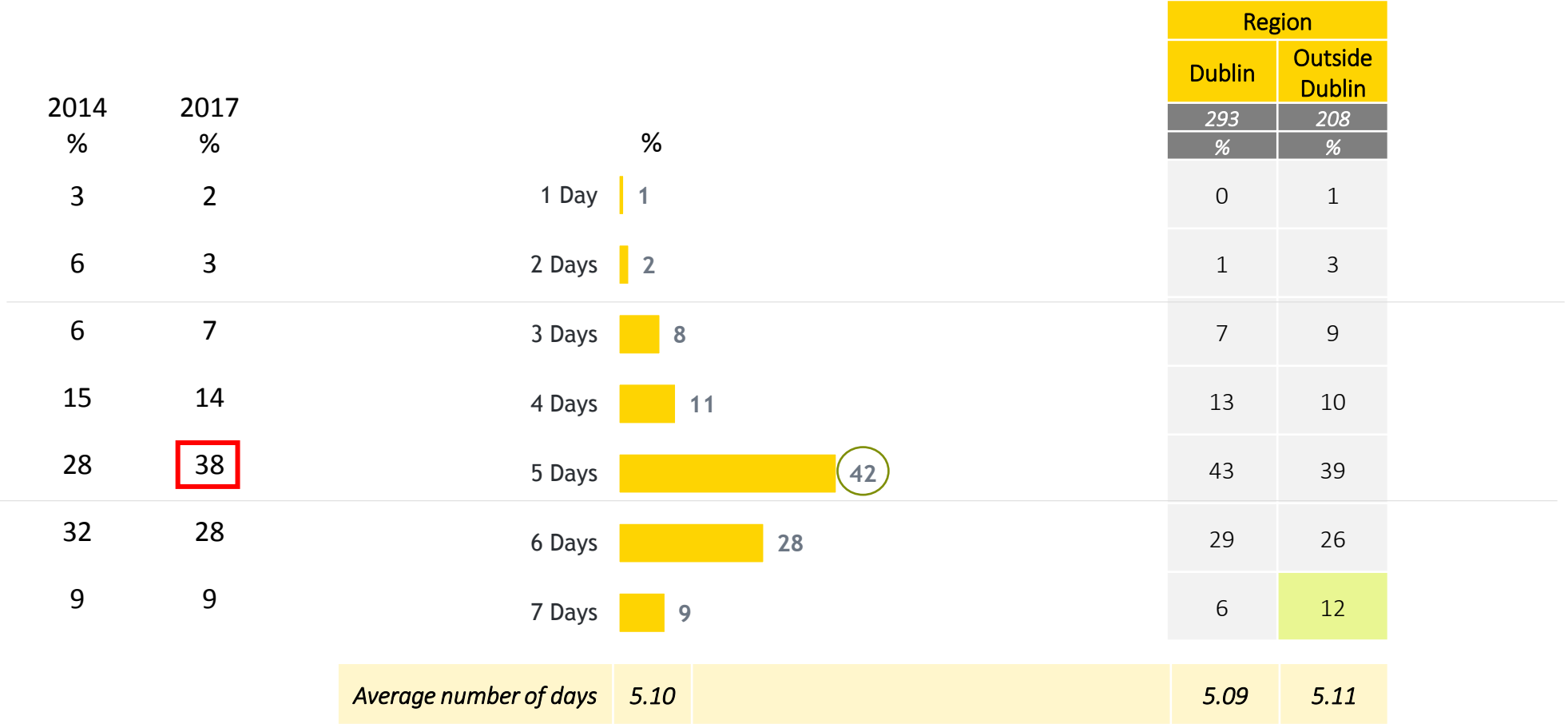
Average number of hours:

| | |
|---------|----------|
| WAV | 45 hours |
| Non-WAV | 43 hours |

Number of days per week normally work



Base: All Taxi drivers: 501



Despite the fact that there is a much higher proportion working 7 days a week outside Dublin than in Dublin, the average number of days per week is relatively similar: 5 days per week.

Number of days per week normally work

Base: All Taxi drivers: 501

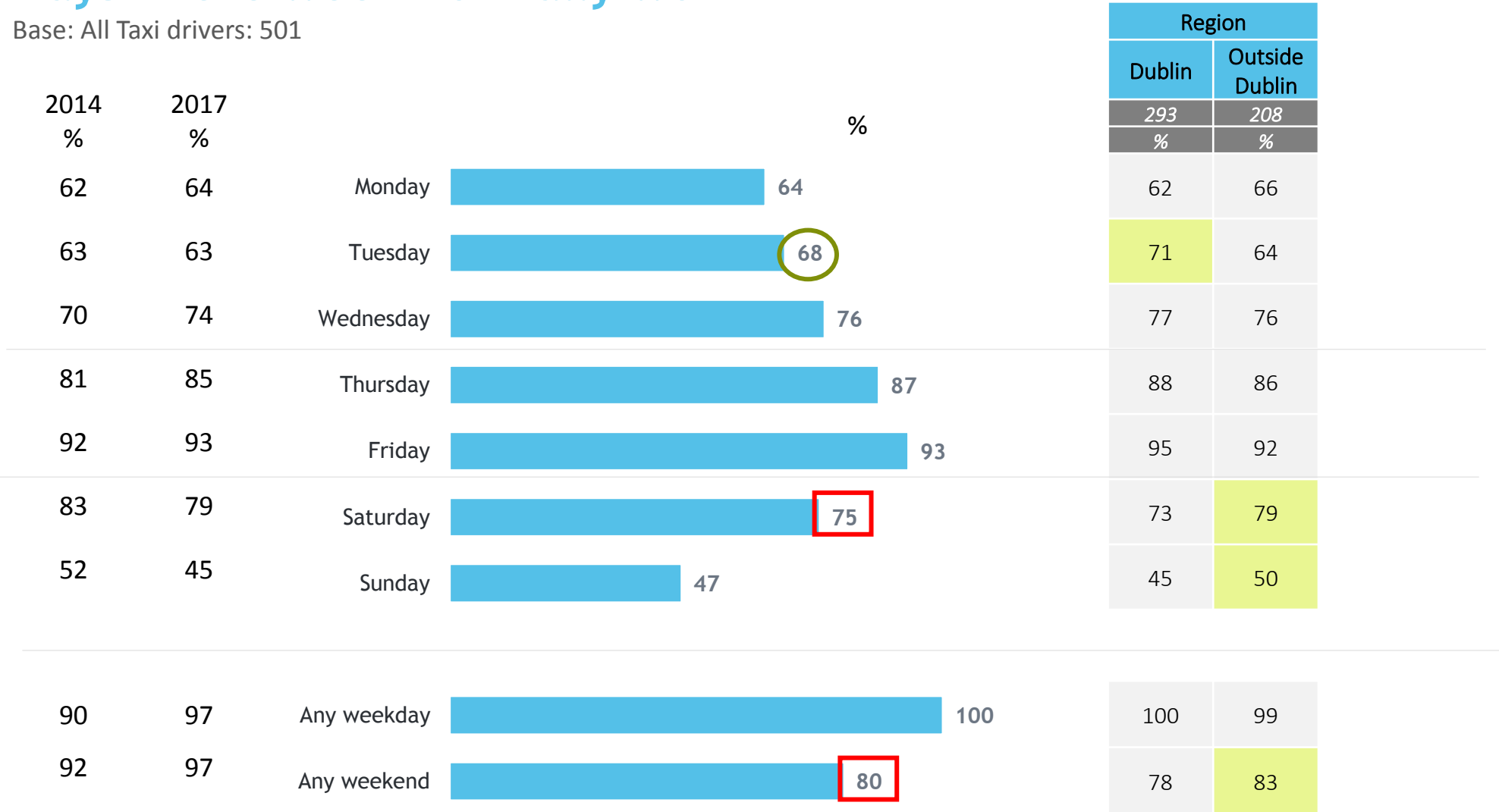


| | | | | Wheelchair Accessible | |
|------------------------|------|--------|----|-----------------------|------|
| | | | | Yes | No |
| 2014 | 2017 | | | 248 | 253 |
| % | % | | | % | % |
| 3 | 2 | 1 Day | 1 | - | 1 |
| 6 | 3 | 2 Days | 2 | 1 | 3 |
| 6 | 7 | 3 Days | 8 | 7 | 9 |
| 15 | 14 | 4 Days | 11 | 13 | 9 |
| 28 | 38 | 5 Days | 42 | 44 | 40 |
| 32 | 28 | 6 Days | 28 | 27 | 28 |
| 9 | 9 | 7 Days | 9 | 7 | 10 |
| Average number of days | | | | 5.11 | 5.08 |

Little difference by WAV and non-WAV drivers in terms of the number of days per week they work.

Days in the week normally work

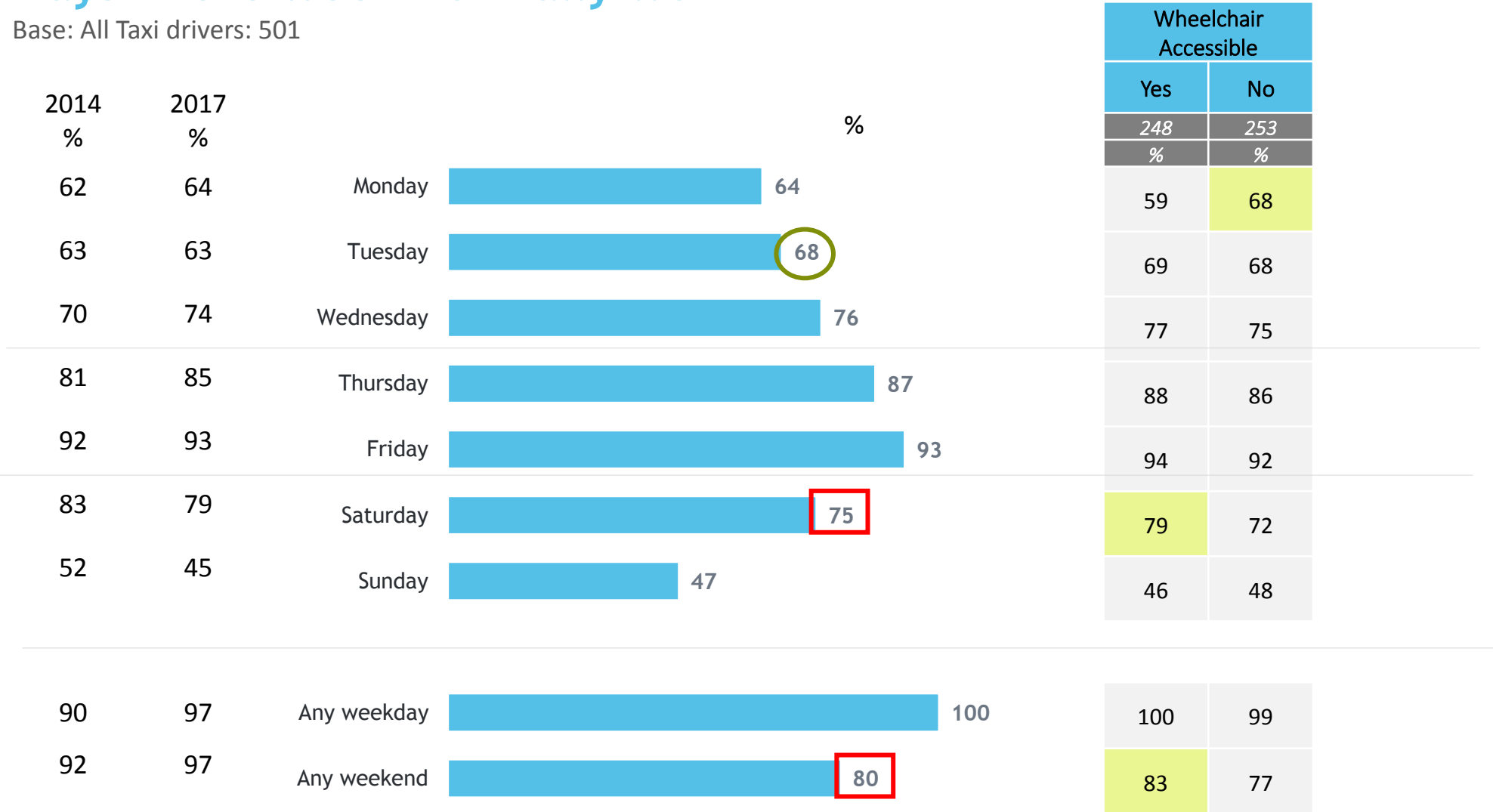
Base: All Taxi drivers: 501



Higher proportion working weekends outside of Dublin. Decline noted in overall percentage working on a Saturday, with an increase in numbers working on Tuesday vs. 2017.

Days in the week normally work

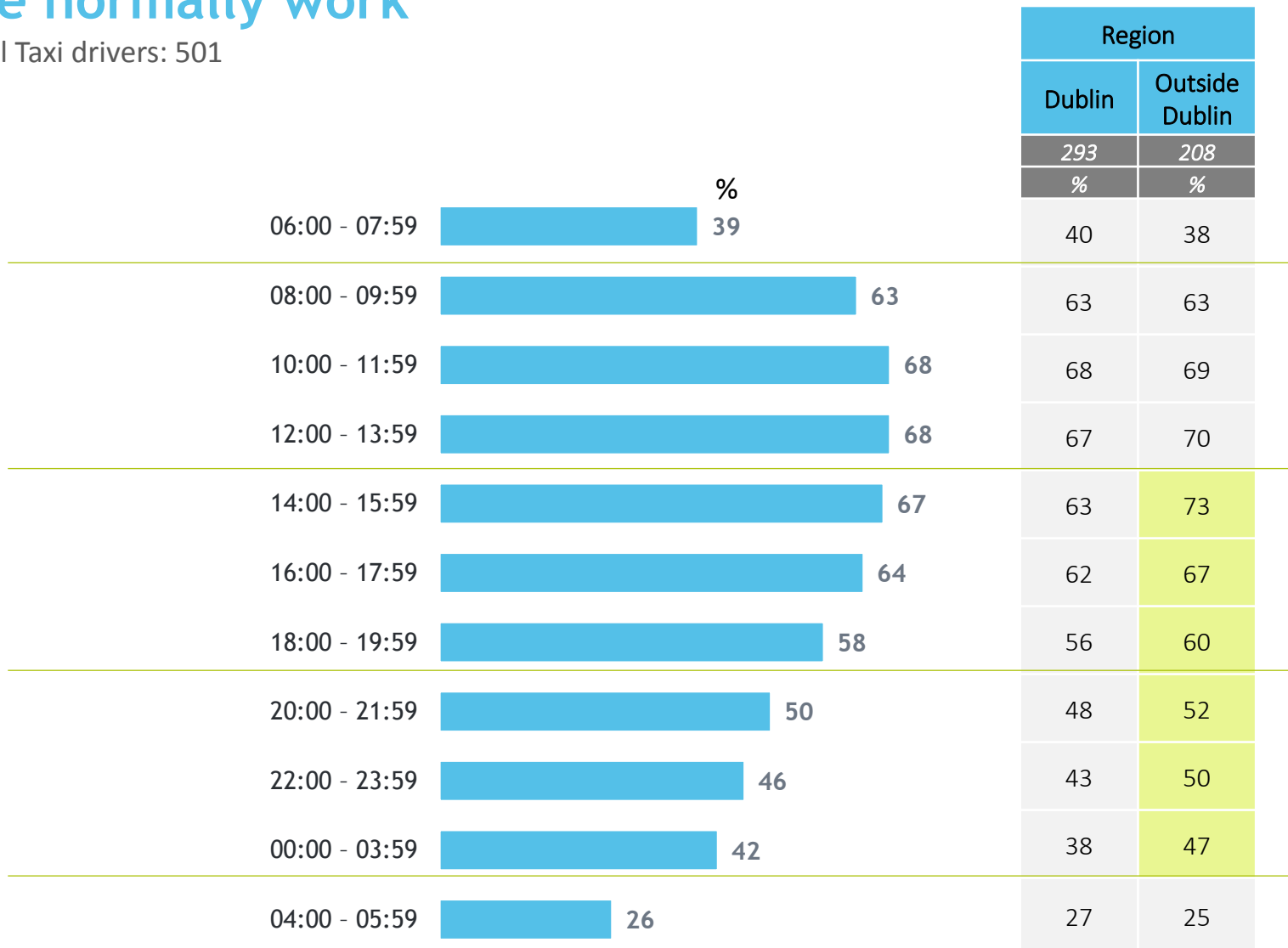
Base: All Taxi drivers: 501



WAV drivers more likely to be working weekends than non-WAV drivers, who are more likely to work Mondays.

Time normally work

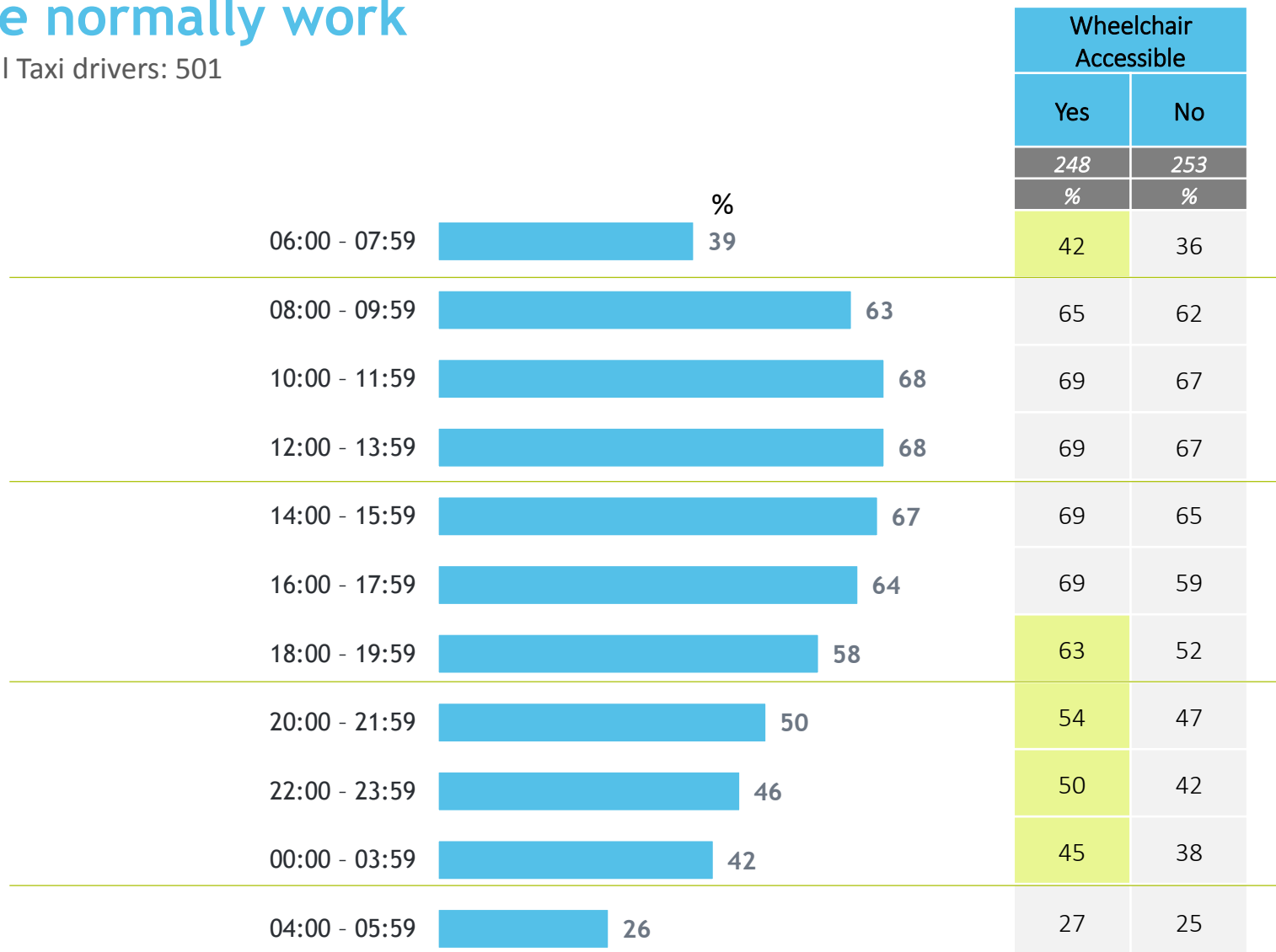
Base: All Taxi drivers: 501



Higher proportion of taxi drivers working between the hours of 2pm and 4am outside of Dublin.

Time normally work

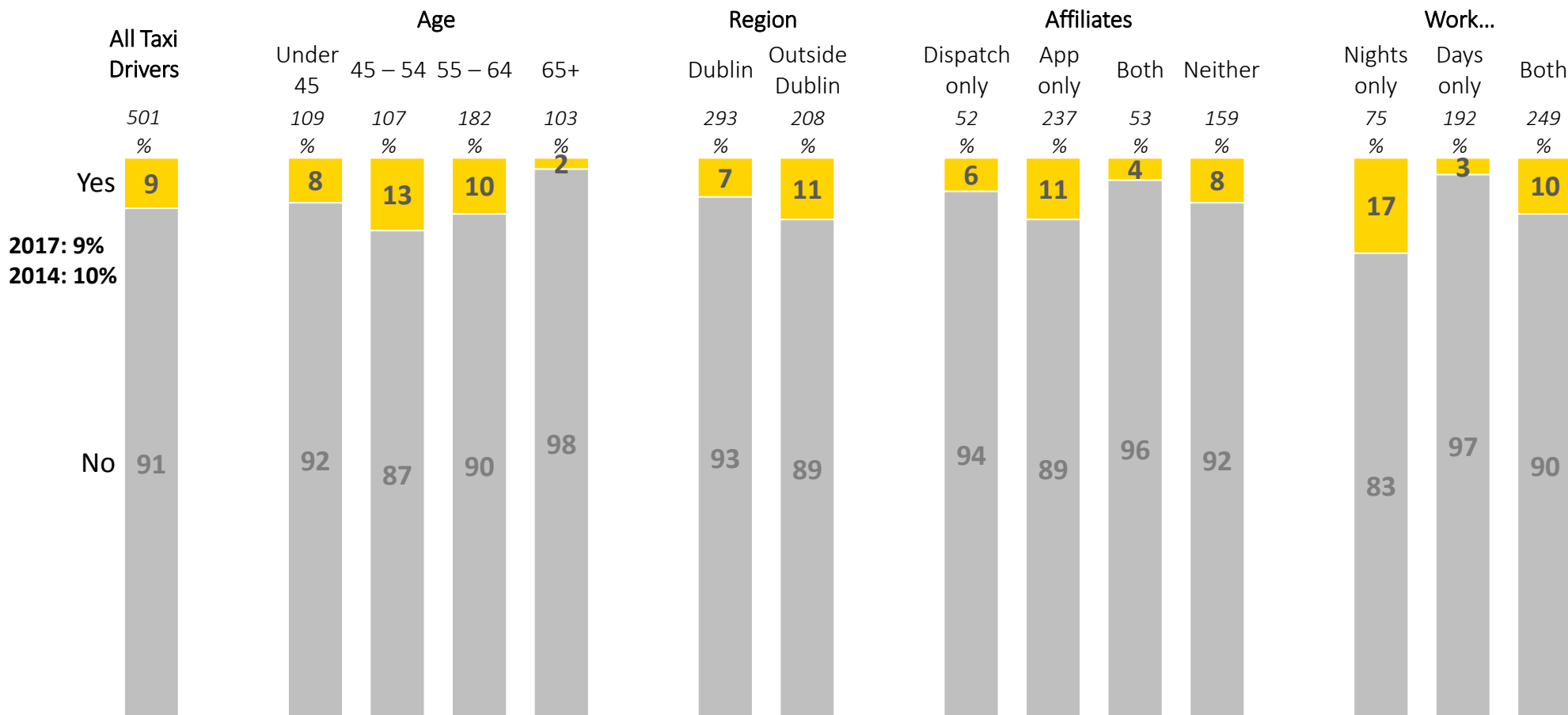
Base: All Taxi drivers: 501



Higher proportion of WAV taxi drivers working evenings and nights than non-WAV.

Other occupation

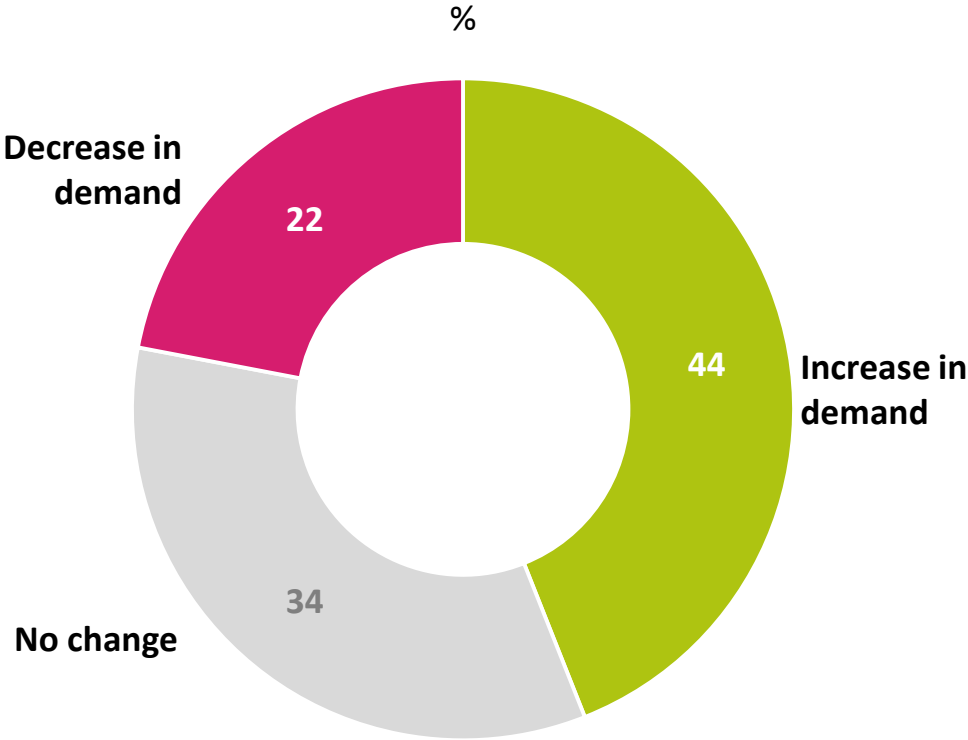
Base: 501 taxi drivers



1 in 11 (9%) have another occupation. More likely to be middle aged, living outside Dublin and/or working nights only.

Demand for taxi services in the past 2 years

Base: 501 taxi drivers



| | Increase | No change | Decrease |
|---------|----------|-----------|----------|
| | % | % | % |
| WAV | 42 | 33 | 25 |
| Non-WAV | 45 | 35 | 20 |
| | | | |
| 2019 | 44 | 34 | 22 |
| 2017 | 42 | 38 | 18 |
| 2014 | 20 | 25 | 53 |

More than 2 in 5 (44%) feel there has been an increase in the demand for taxis (+2% pts vs. 2017). In addition, the proportion claiming there has been no change has increased (+4% pts vs. 2017). Very different picture to 2014, when over half (53%) felt there had been a decline in demand. WAV drivers more inclined to claim there has been a decline in demand than non-WAV.

Taxi driver income: WAV

Base: 248 taxi drivers

11 jobs per 8 hour shift
on average

54 jobs per week
on average

x

€14.64 fare charged
on average

=

c. €791 weekly earnings on average
(Estimate)

Taxi driver income: Non-WAV

Base: 253 taxi drivers

11 jobs per 8 hour shift
on average

54 jobs per week
on average

X

€11.12 fare charged
on average

=

c. €600 weekly earnings on average
(Estimate)