



Údarás Náisiúnta Iompair
National Transport Authority

COVID Impact Research - Taxi Consumers

National survey
October 2020

Data gathered in September/October -
pre Level 5 Government Restrictions





Introduction

Introduction

- This report details the findings of a representative survey of taxi users in Ireland.
- The survey was undertaken online through the B&A Acumen panel between **9th September – 3rd October, pre Level 5 Government Restrictions.**
- A survey of taxi operators has been undertaken by phone in tandem, covering a similar topic and aimed at understanding the impact COVID-19 has had on taxi usage and attitudes towards the safety of using taxis.
- The survey is the first one looking at the impact of the COVID-19 pandemic on the taxi industry from a consumer perspective.
- The objective is to utilise the data to assist the industry and travelling public during these uncertain times.



Objectives

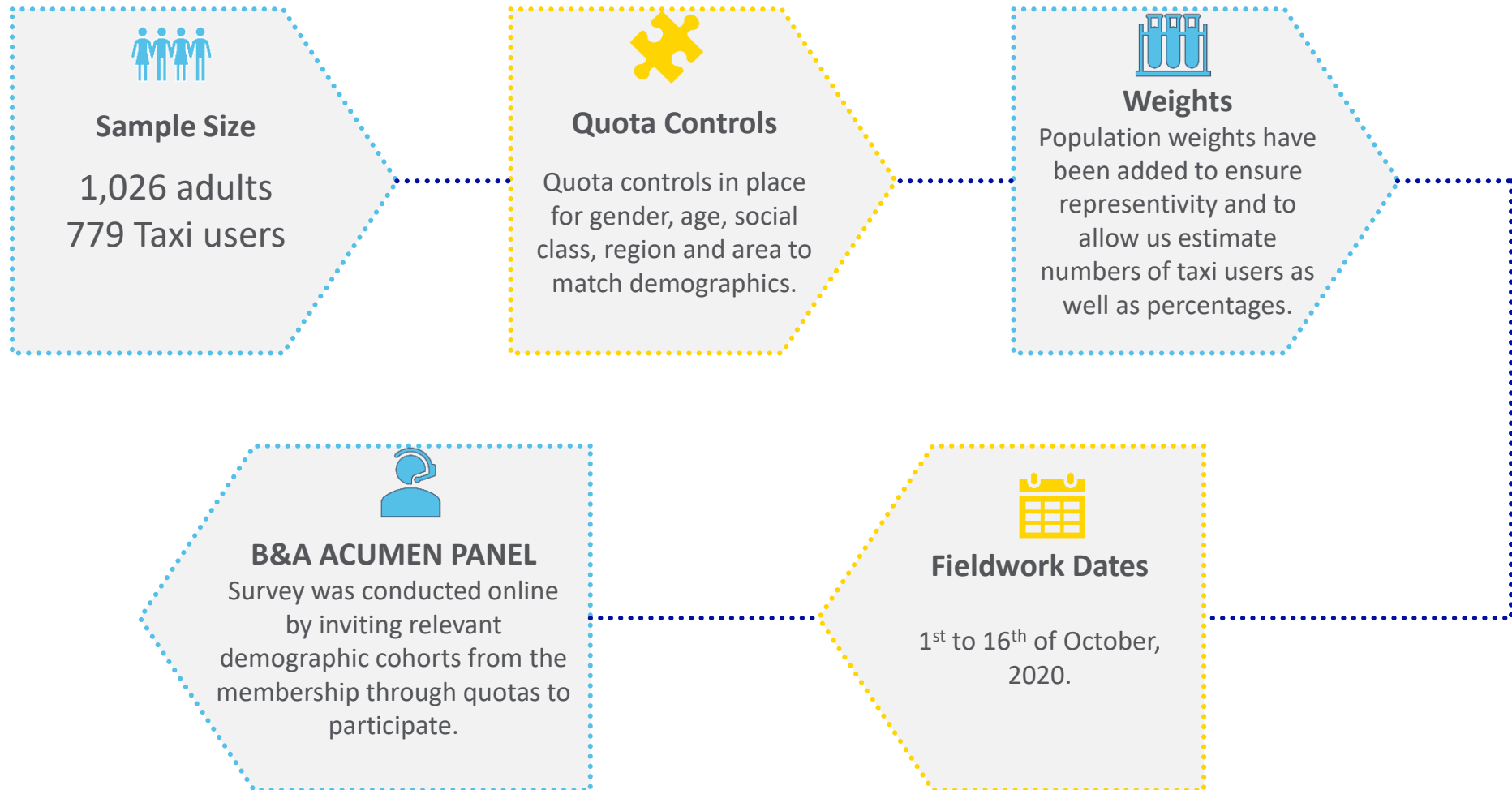
- This research aimed to understand:
 - ❖ Incidence of taxi usage both in itself and in the context of other public transport modes.
 - ❖ Projected usage looking forward
 - ❖ Usage behaviour around ordering and payment
 - ❖ Attitudes to safety measures and an exploration of what aspects would help allay any anxiety around health safety in survey
- The core objective of this survey was to answer the question below:

What impact has COVID-19 had on taxi users and the future of the industry?



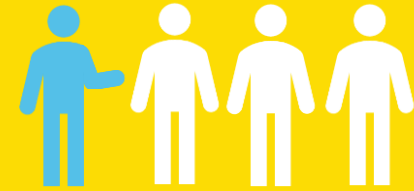
Methodology

A representative survey of taxi users in Ireland.





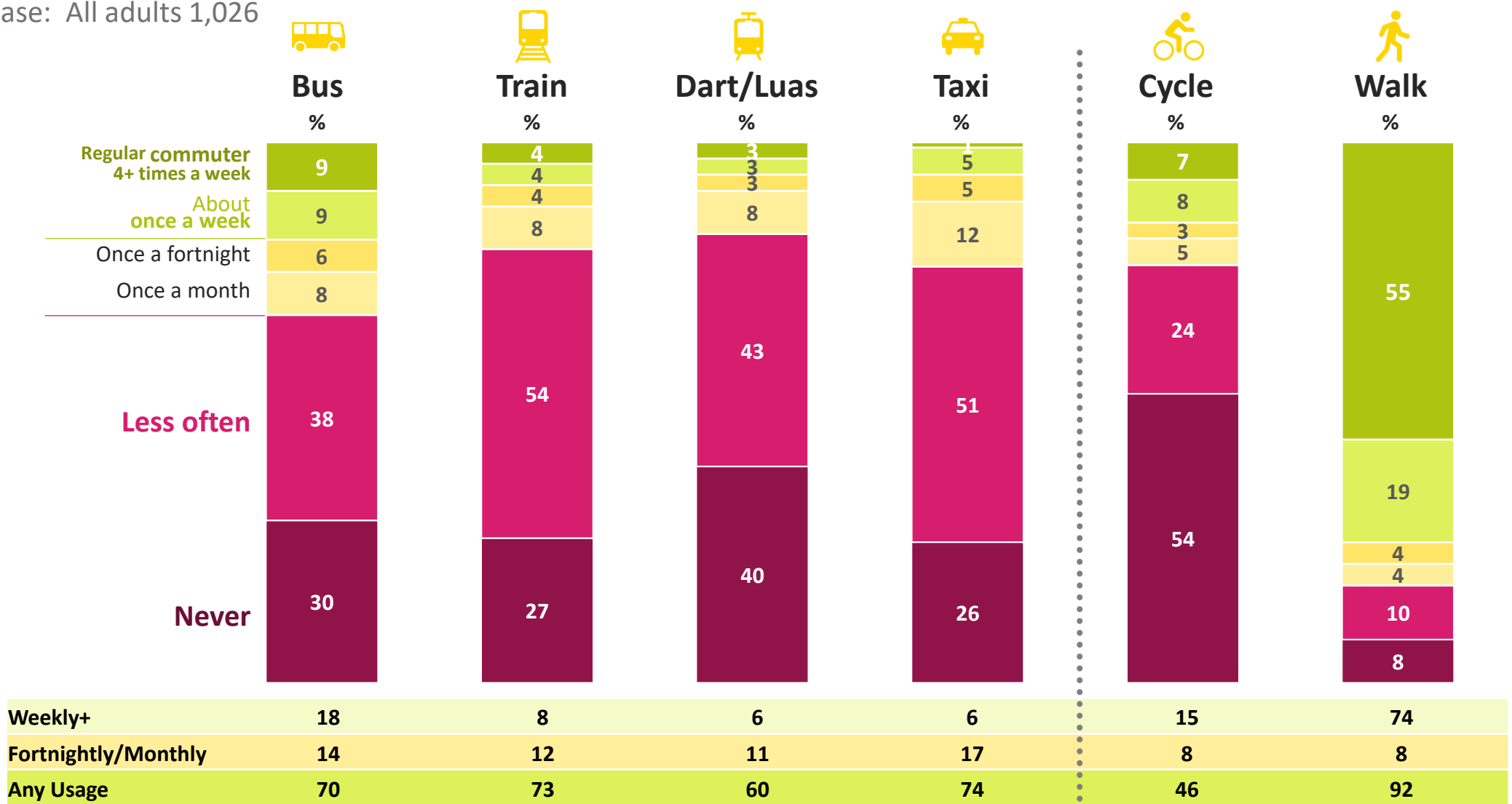
Taxi usage in context of public
transport usage



**74% of
adults are taxi
users but only 6%
use weekly**







Walking is now the main form of commuter transport. Of all vehicular modes, taxi has the lowest heavy user base. However three quarters of the population claim to be occasional users which is in line with other transport modes.

Base: All adults 1,026



Data suggests that weekly taxi users account for about 100k journeys

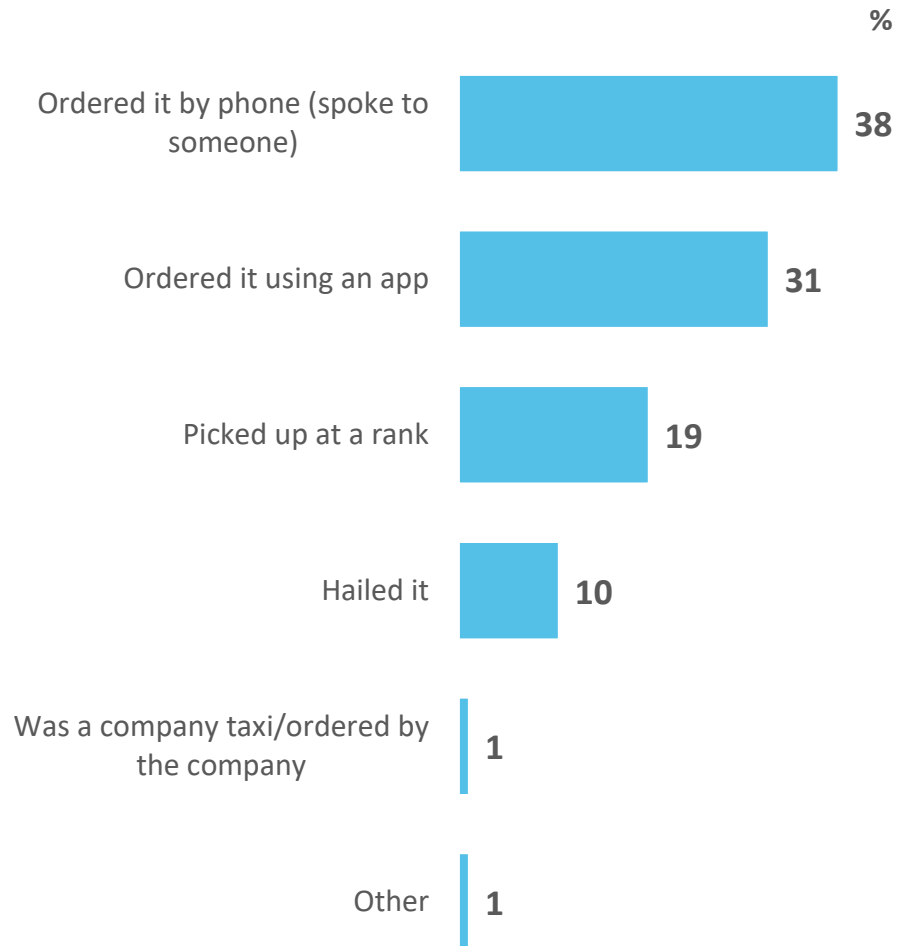
Base: All adults 1,026

						
	Bus	Train	Tram/Luas	Taxi	Cycle	Walk
	Nos (000)	Nos (000)	Nos (000)	Nos (000)	Nos (000)	Nos (000)
4+ times a week	360	135	110	25	240	2050
Once a week	330	140	110	170	280	750
Less often	1,910	2,425	1,980	2,505	1,180	600
ANY USAGE (people)	2,600	2,700	2,200	2,700	1,700	3,400
ANNUAL VOLUME ESTIMATE (journeys)	110,347	54,037	44,867	36,061	74,230	468,038
ROUNDED	110M	54M	45M	36M	74M	468M
Share %	14%	7%	6%	5%	9%	59%

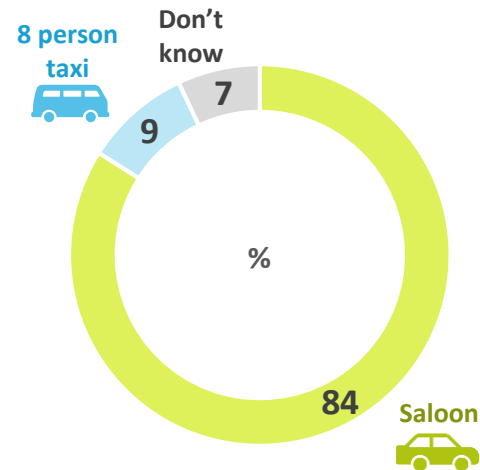
Current taxi usage norms: Phone and app usage most common to find a taxi currently. Friday and Saturday the most popular days and there is greater demand after 6p.m.

Method used to get taxi

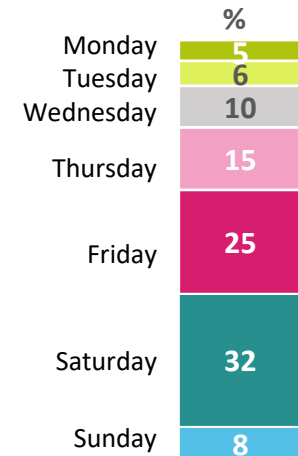
Base: All used taxi in past year - 818



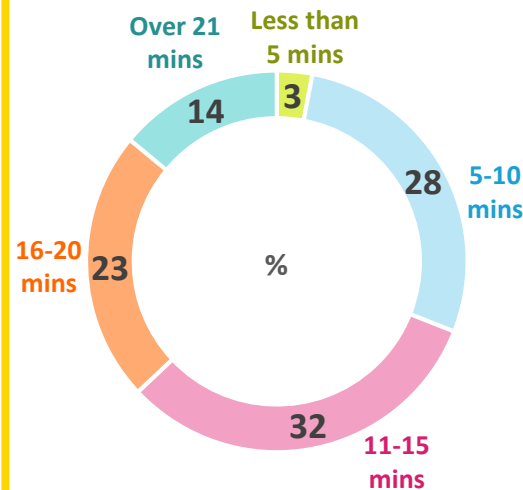
Vehicle type



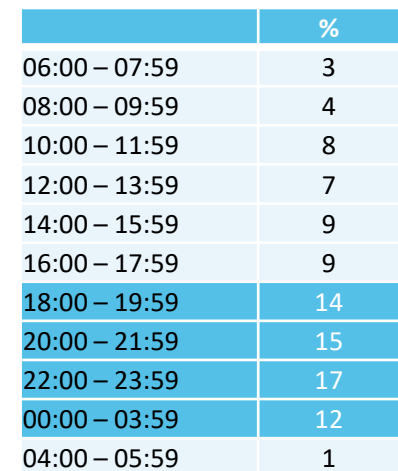
Day of week



Duration of journey

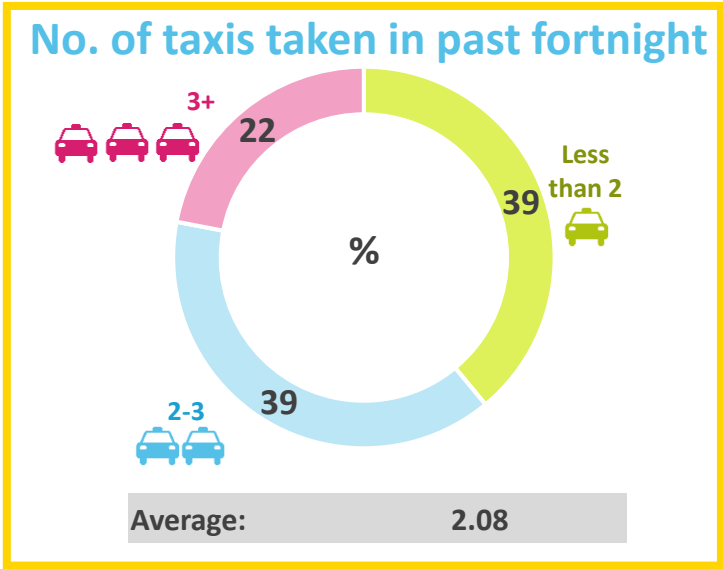
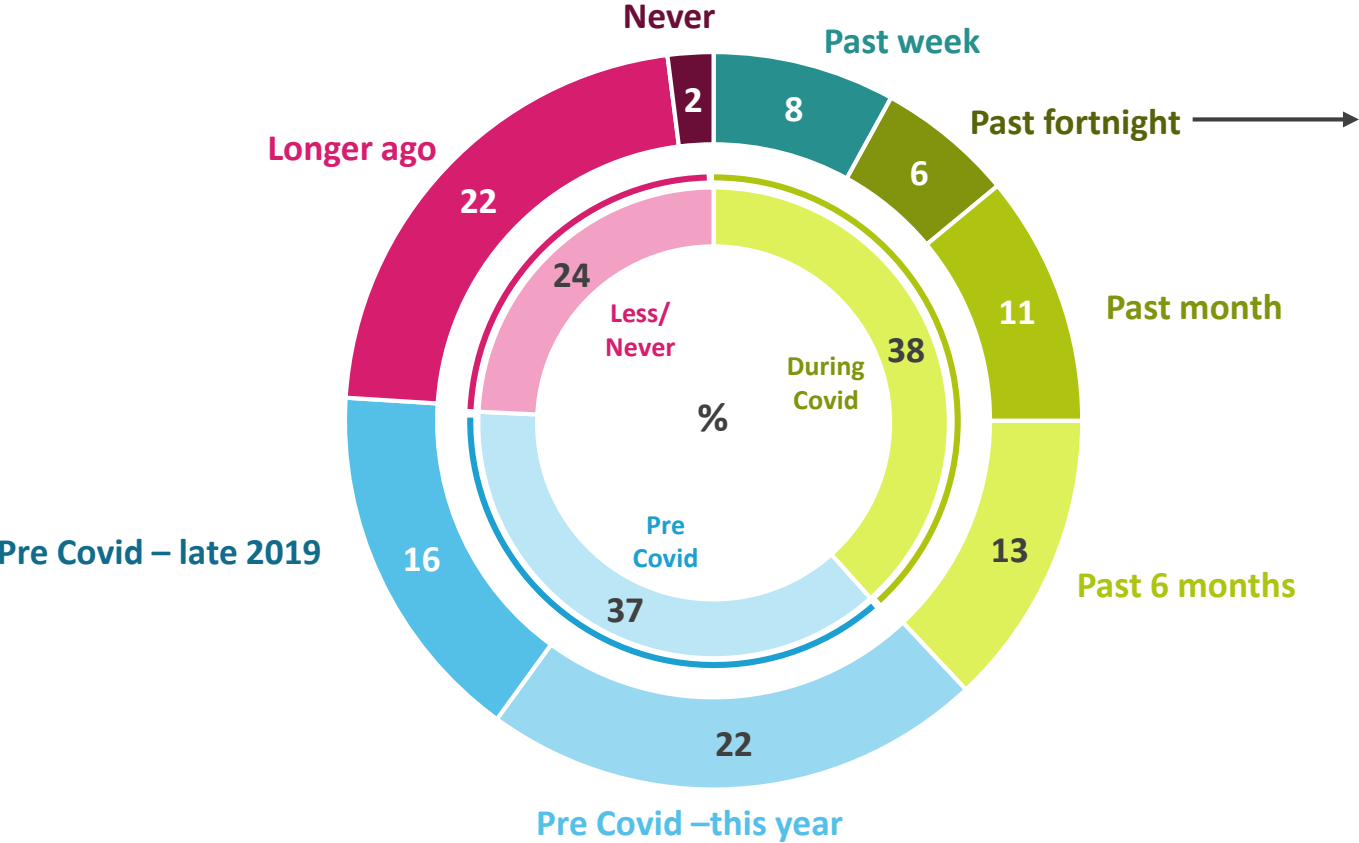


Time of day

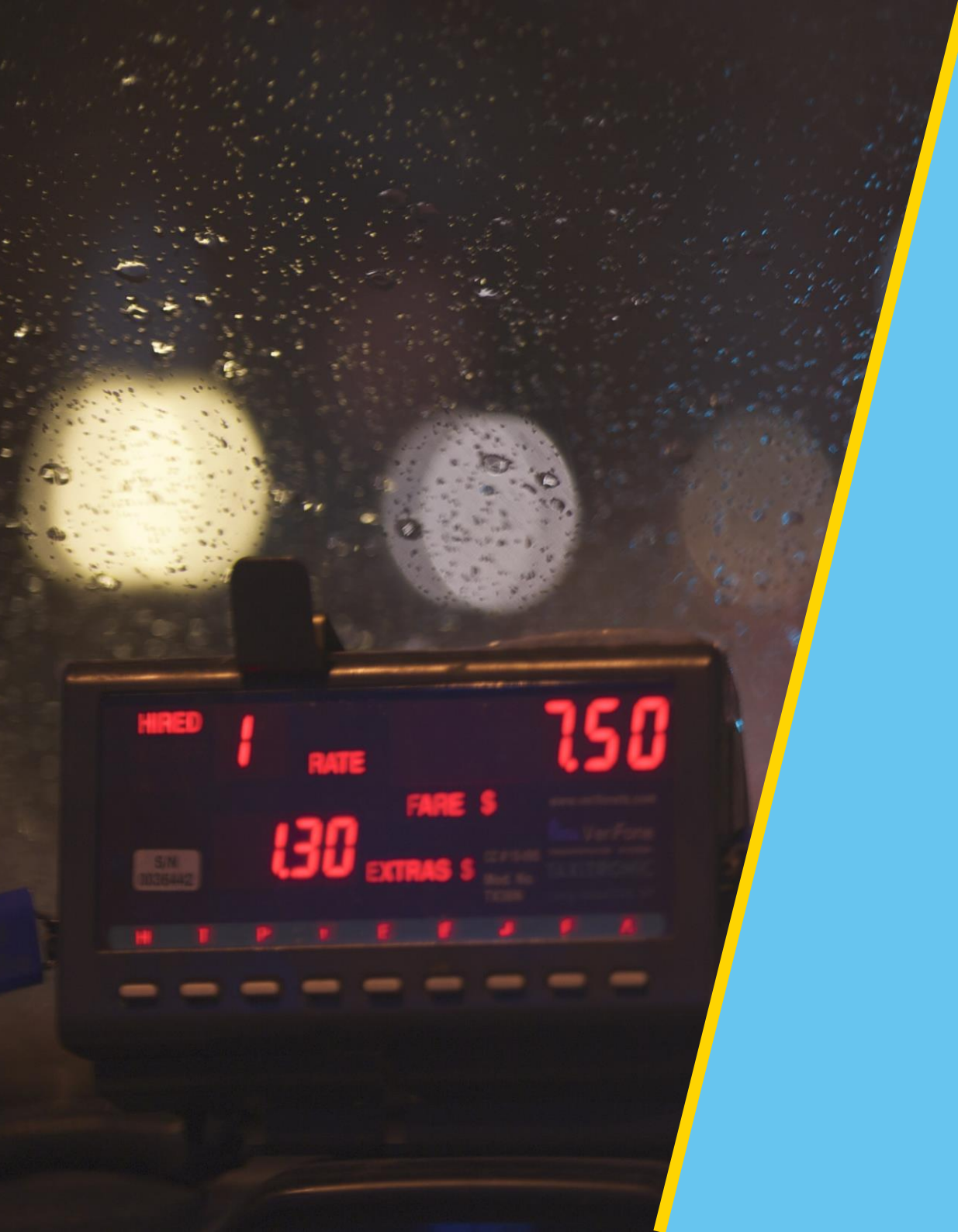


38% have experience of using a taxi during the Covid pandemic. 1 in 7 (15%) used a taxi in past fortnight on average twice during in that time frame (data gathered between 9th September - 3rd October.)

Base: All adults 1,043



Recency	User base estimate
Past week	300,000
Past fortnight	225,000
Past month	425,000



**Convenience
(26%) and speed
(24%) the main
reasons for using
taxi**

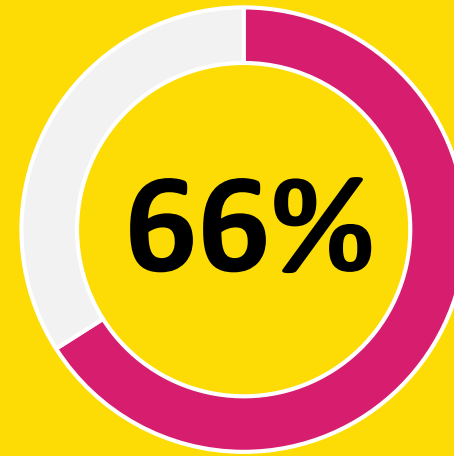
Reason for using a taxi: The two main reasons for selecting a taxi are convenience and speed.

Base: All with other transport available - 474

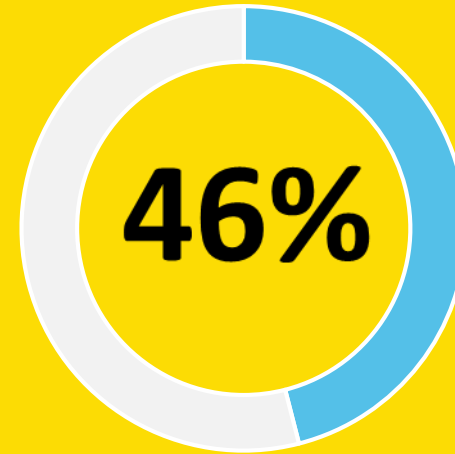
	TOTAL
<i>Base (unweighted):</i>	474
	%
Easier/Convenient/Handy	28
Quicker/Faster	22
So I could have a drink/Consumed Alcohol	13
Weather was bad	13
Safer option	11
Suited better than bus	11
Safer than walking	9
Had heavy items	6
Didn't want to look/pay for parking	5
Dropped to door	3
Prefer using Taxis	2
Direct Covid mention	1
High heels on!	1
Other	2



So what has changed in
consumer view of taxi usage?



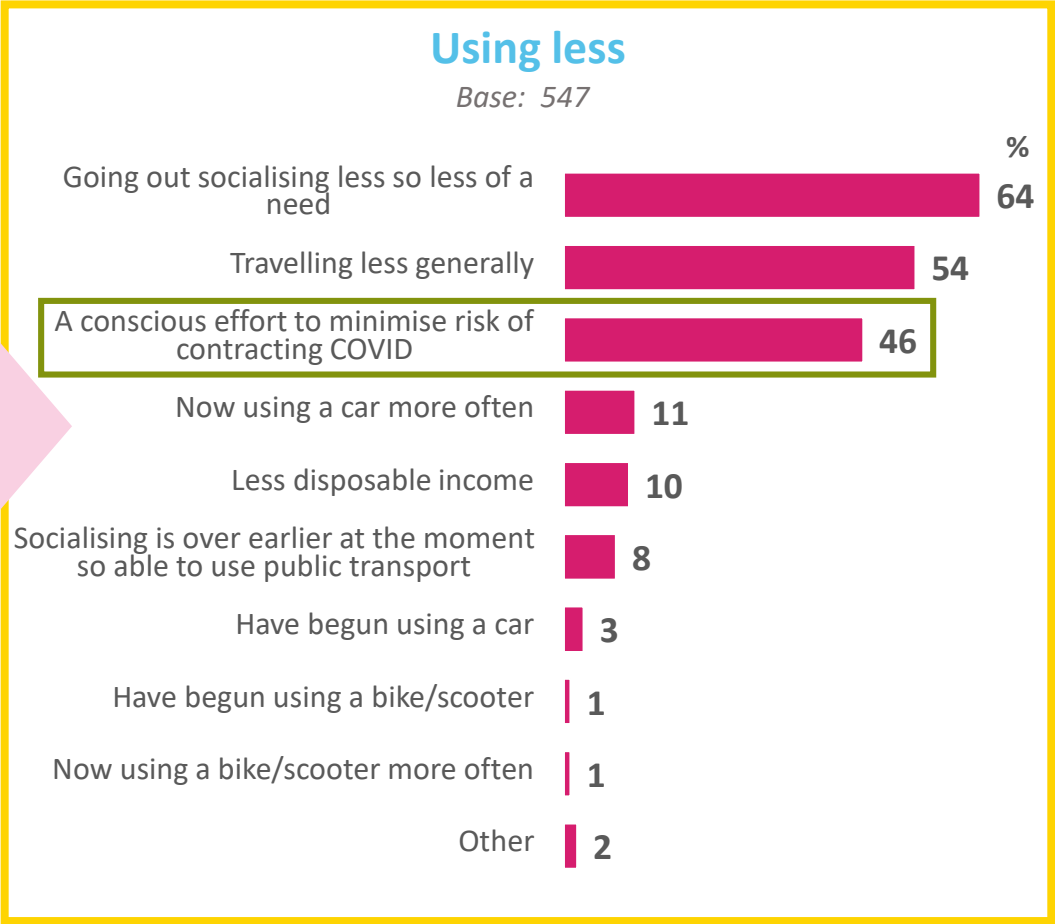
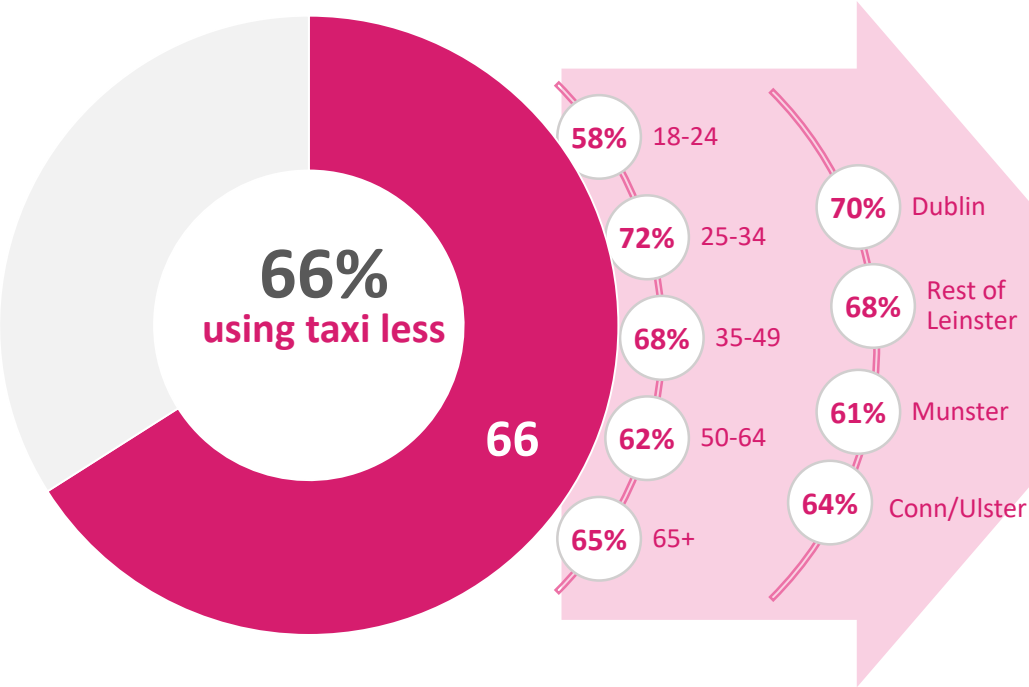
are **using**
a taxi less



of those
using a **taxi less** are doing so to
minimise the risk of
contracting Covid.

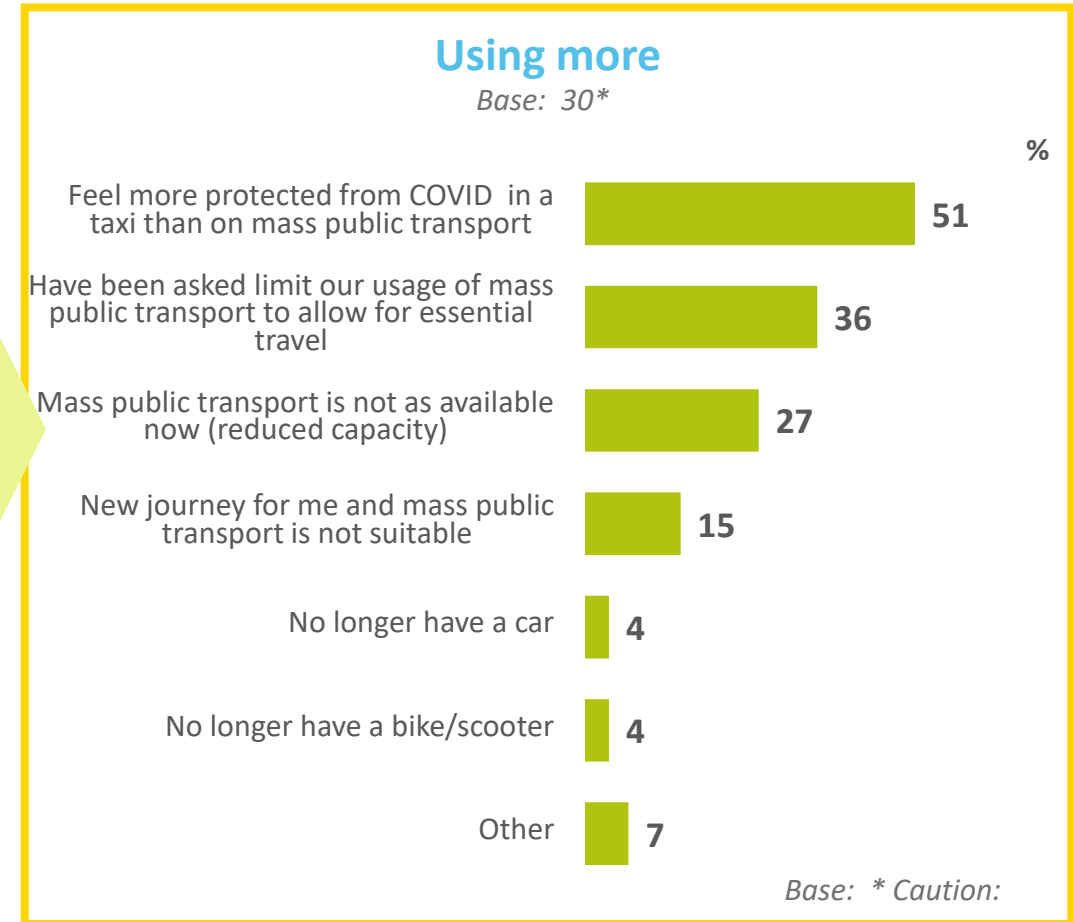
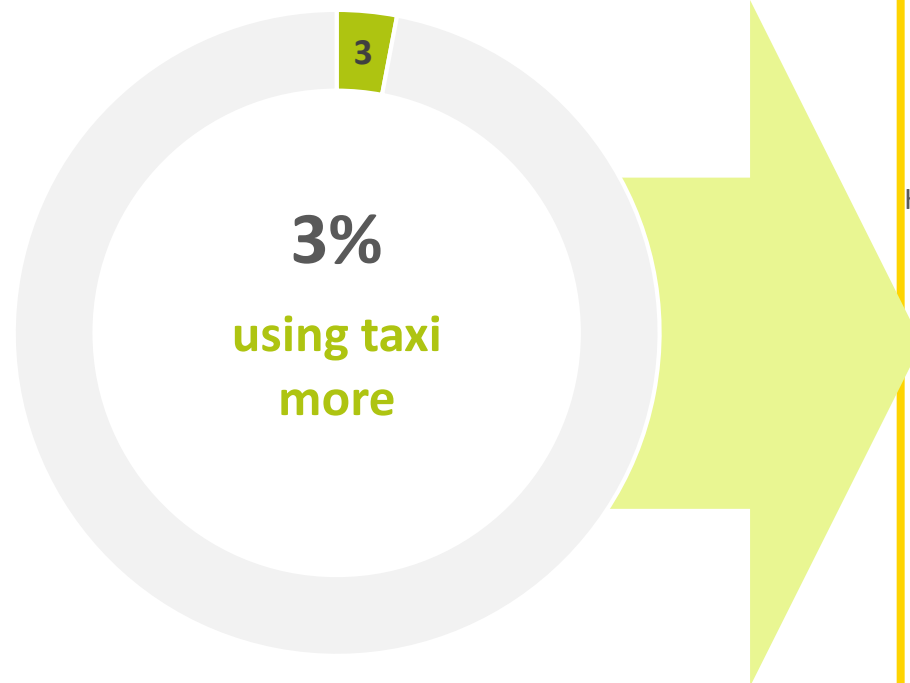
Two thirds of taxi users using this service **less** often. Highest in Dublin and among those 25-34. Close on half are making a conscious effort to avoid to minimise risk of COVID contraction

Base: All taxi users past year 818



Only a small minority are using taxi services more often and for this small group, about half feel more protected than on mass public transport

Base: All Adults 1,026

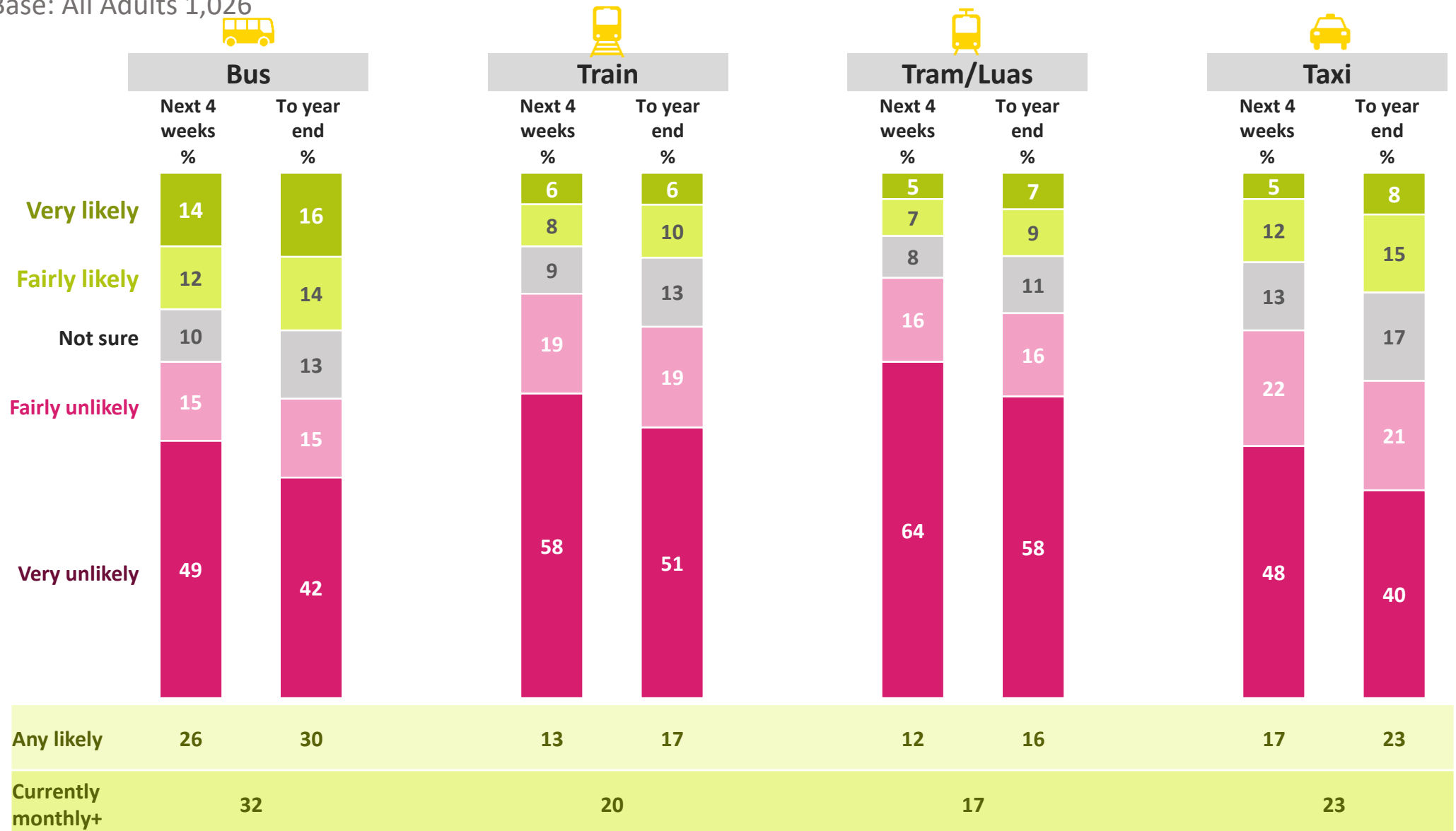




**The evidence suggests
public were not
anticipating very much
change in public
transport usage
patterns (even without
lockdown) for the
remainder of the year.**





Looking forward, if lockdown had not occurred, the evidence suggests that perceptually there was only minor potential growth for all modes of public transport.

Base: All Adults 1,026

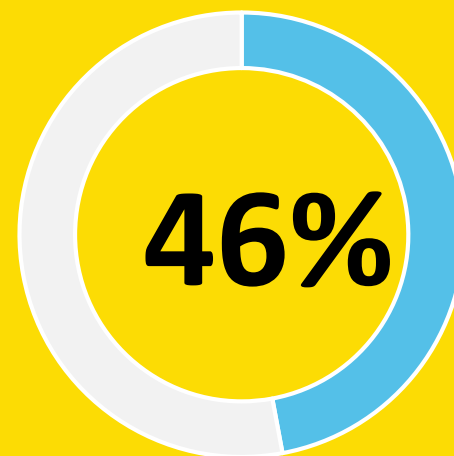


Very little evidence of any major potential shift in transport usage patterns*

Base: All Adults 1,026

	 BUS USERS			 TRAIN USERS			 TRAM USERS			 TAXI USERS		
	Weekly+	Less	Never	Weekly+	Less	Never	Weekly+	Less	Never	Weekly+	Less	Never
Base (unweighted):	204	544	295	83	682	278	65	560	418	63	718	262
	%	%	%	%	%	%	%	%	%	%	%	%
Very/fairly likely to use...												
Next four weeks	75	21	2	68	12	2	70	13	3	77	18	1
Before year end	78	27	3	72	17	1	74	20	10	73	27	2

****Data refers to bus users projections for Bus usage, train users projections of tram usage etc.***

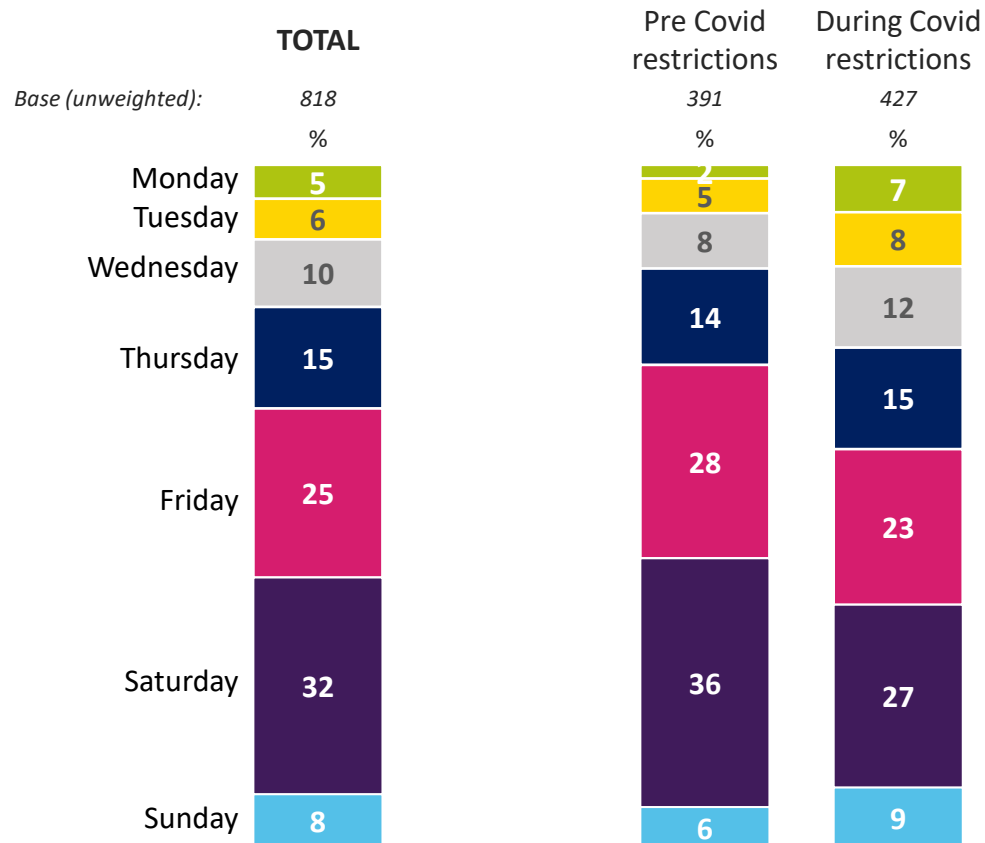


**Used a taxi between
6pm and
midnight**
(minor change to
normal trends)

Taxi usage comparisons. While Friday and Saturday continue to dominate where usage need is greatest, day of week is more broadly based than previously.

Base: All used taxi in past year - 818

Day of week



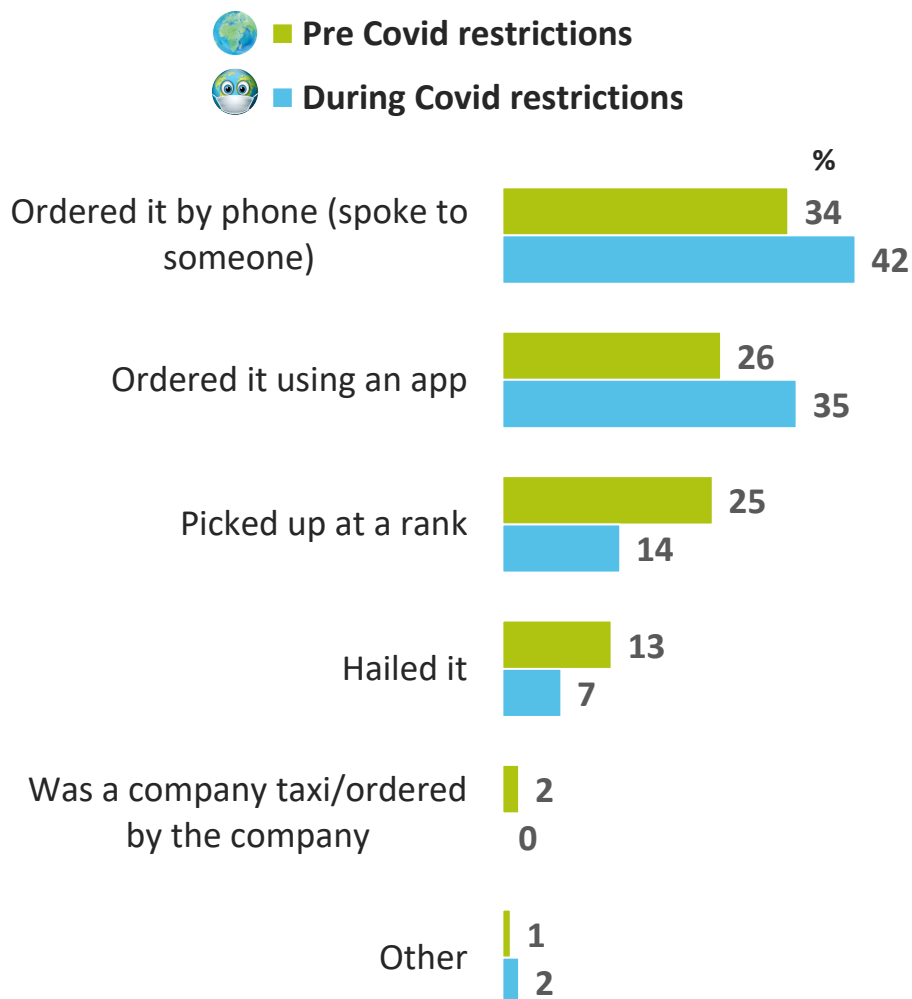
Time of day

	TOTAL	Pre Covid restrictions	During Covid restrictions
Base (unweighted):	818	391	427
	%	%	%
06:00 – 07:59	3	3	2
08:00 – 09:59	4	5	4
10:00 – 11:59	8	9	8
12:00 – 13:59	7	7	8
14:00 – 15:59	9	7	11
16:00 – 17:59	9	9	10
18:00 – 19:59	14	12	16
20:00 – 21:59	15	19	12
22:00 – 23:59	17	17	16
00:00 – 03:59	12	12	12
04:00 – 05:59	1	1	1

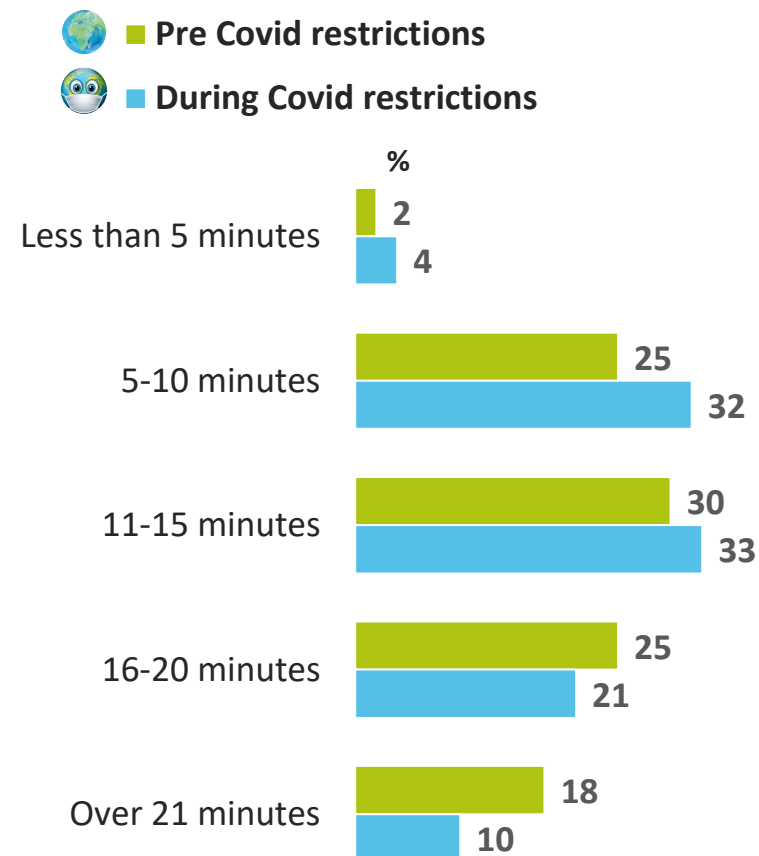
Taxi usage comparisons. Pre-ordering a taxi has increased while journey time has reduced

Base: All used taxi in past year - 818

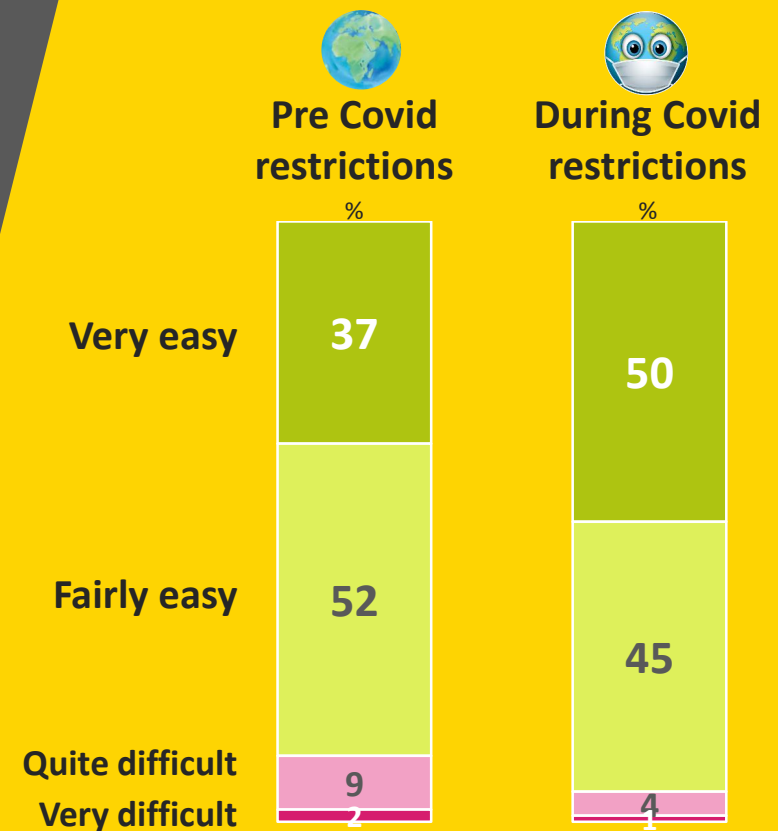
Method used to get taxi



Duration of journey



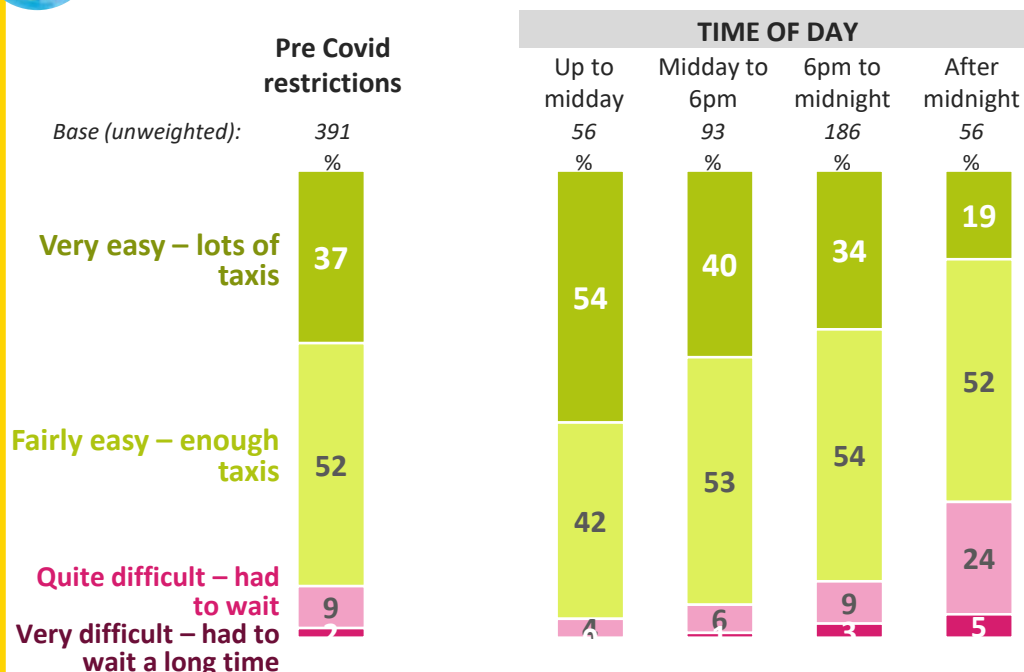
95%
found it easy to get a taxi
during Covid restrictions



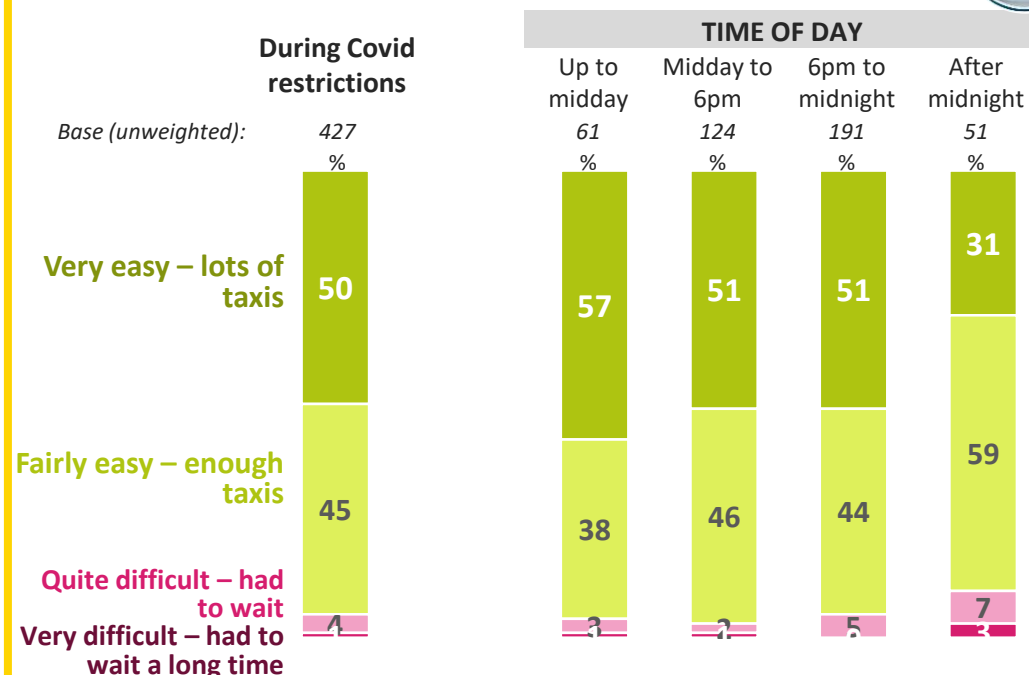
Ease of getting a taxi: It is now easier for the consumer to find a taxi than pre-Covid.



Pre Covid restrictions

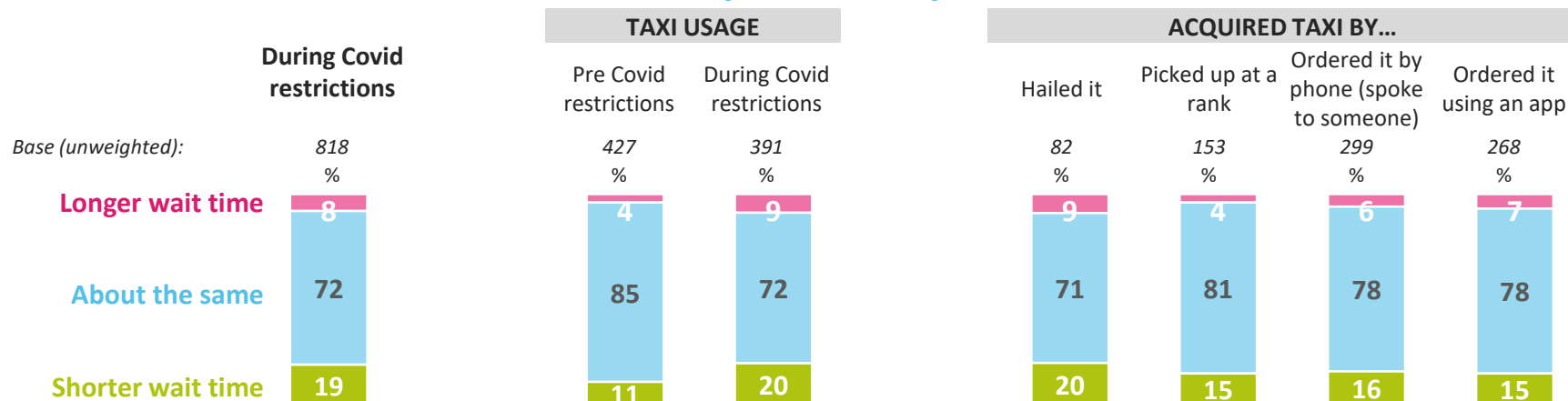


During Covid restrictions



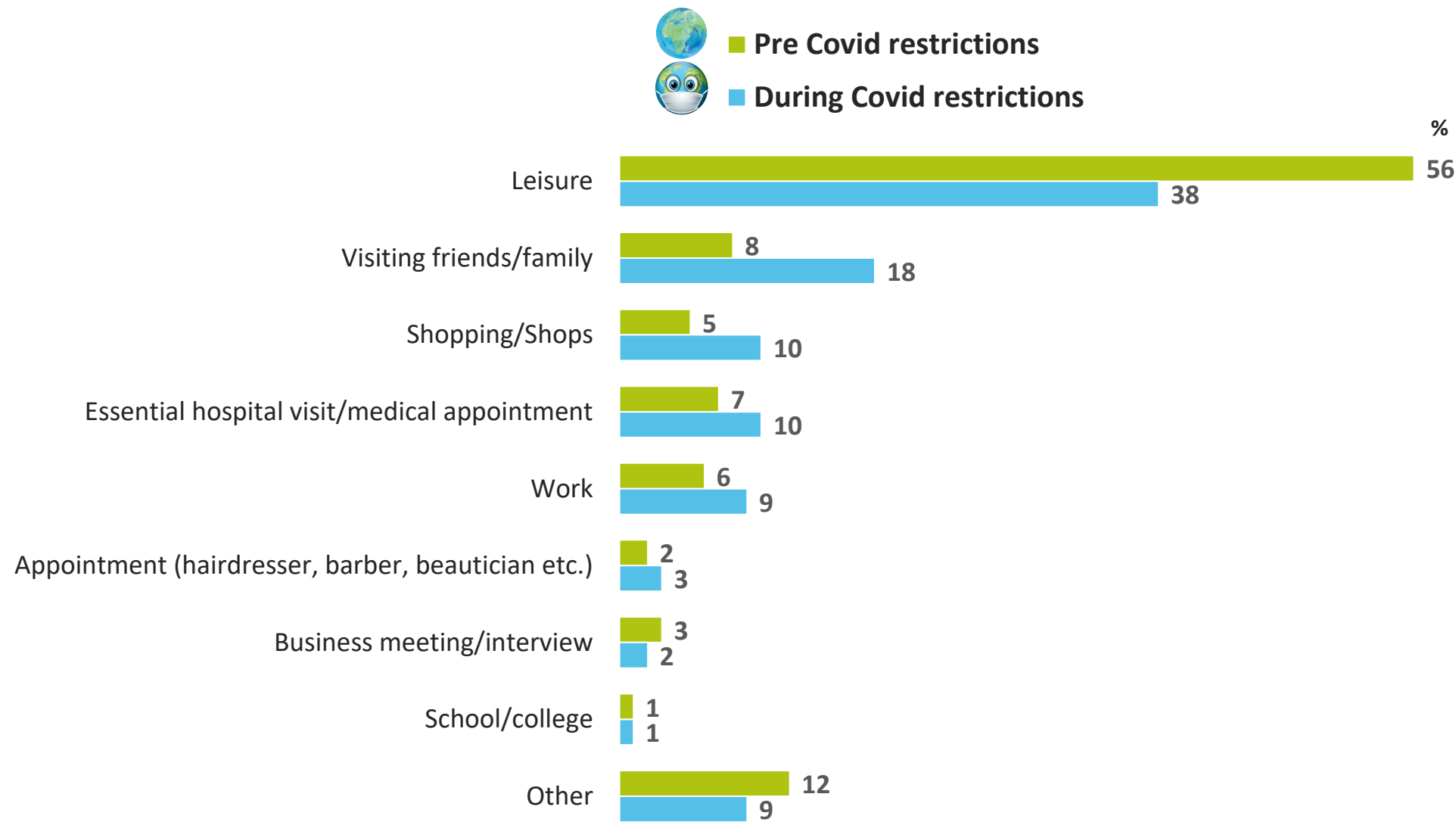
Base: All used taxi in past year - 818

Wait time compared with pre Covid



Main purpose of journey: While leisure continues to dominate, visiting family and friends, shopping and appointments are more important for current taxi users.

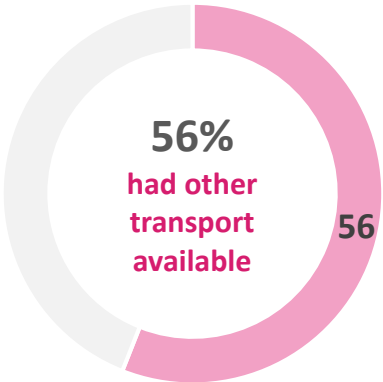
Base: All used taxi in past year - 818



Other forms of transport available: Over half had other transport available - most common being bus but also walking or the car. Very little difference between now and pre Covid on this issue.

Base: All used taxi in past year - 818

Availability of other transport

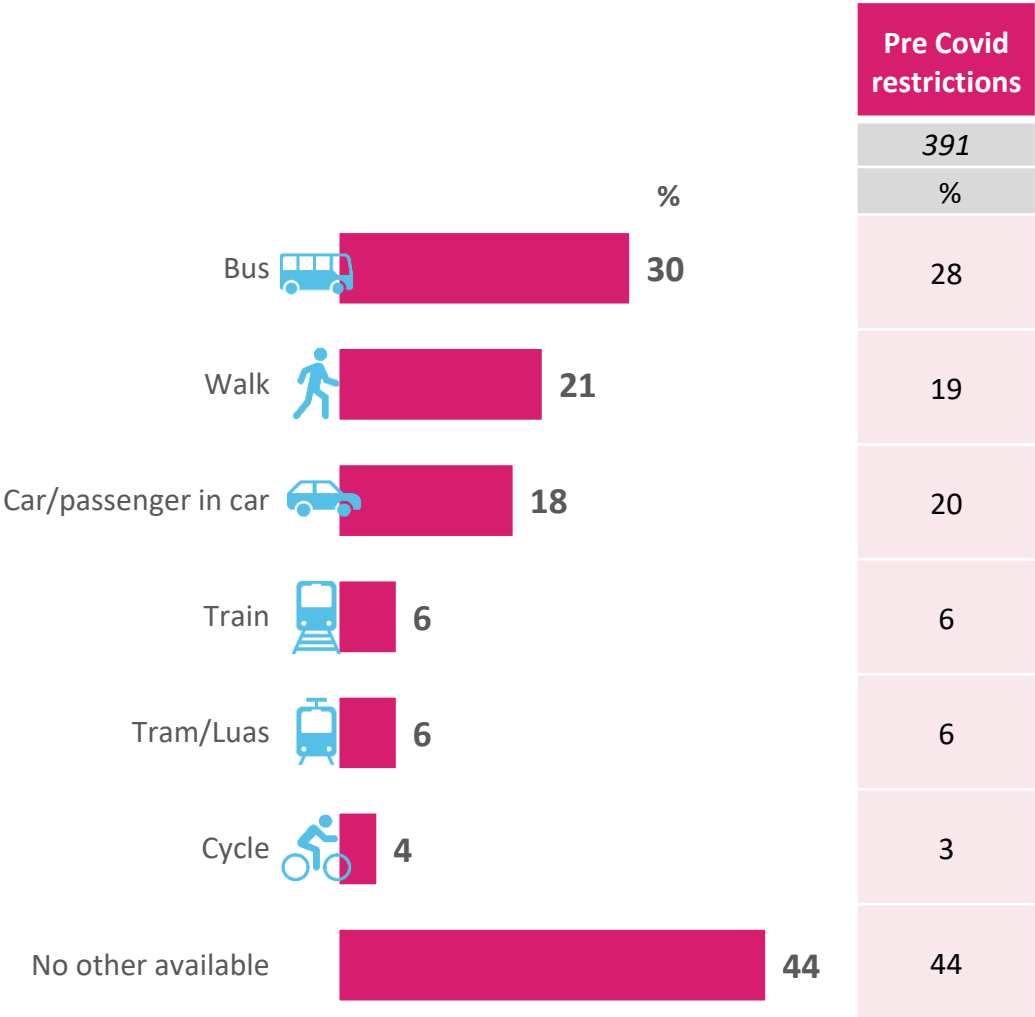


Time of day	
	%
Up to midday	53
Midday to 6pm	66
6pm to Midnight	58
After midnight	36

Pre Covid	During Covid
56%	57%

Region	
	%
Dublin	63
Rest of Leinster	56
Munster	49
Conn/Ulster	57

Other forms of transport available



Reason for using a taxi: The two main reasons for selecting a taxi are convenience and speed. No change between now and pre-Covid



Base: All with other transport available - 474

	TOTAL	Pre Covid restrictions	During Covid restrictions
<i>Base (unweighted):</i>	474	226	248
	%	%	%
Easier/Convenient/Handy	28	30	26
Quicker/Faster	22	21	24
So I could have a drink/Consumed Alcohol	13	13	13
Weather was bad	13	12	14
Safer option	11	10	11
Suited better than bus	11	10	13
Safer than walking	9	7	11
Had heavy items	6	6	6
Didn't want to look/pay for parking	5	8	3
Dropped to door	3	4	2
Prefer using Taxis	2	4	1
Direct Covid mention	1	0	2
High heels on!	1	1	1
Other	2	3	2



How payments are being
made



1 in 2
passengers used
contactless
during Covid
restrictions to pay for their taxi



Pre Covid
restrictions
%



During Covid
restrictions
%

32



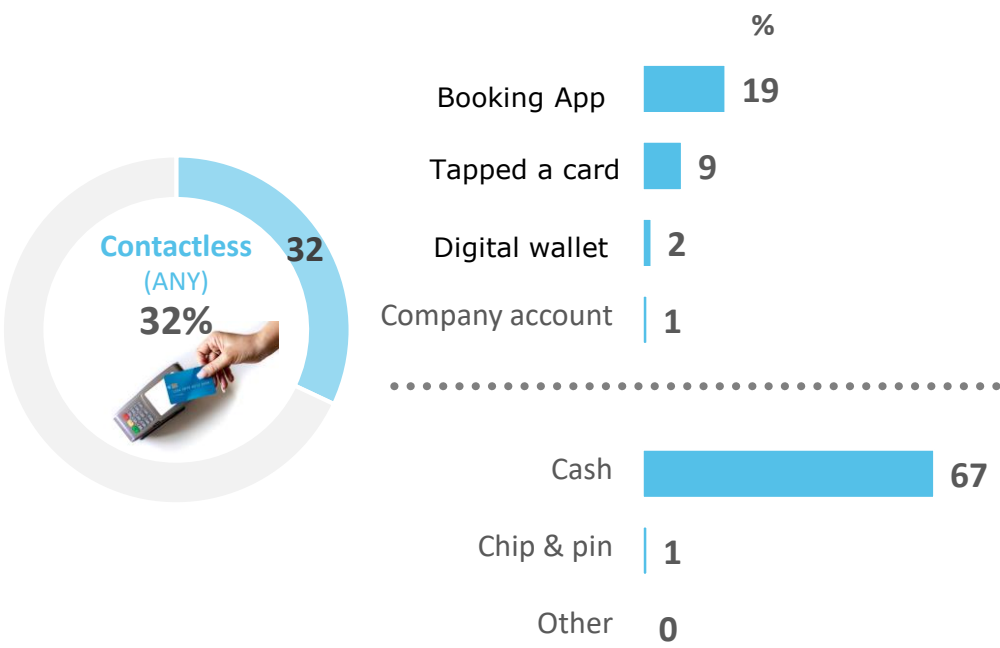
50



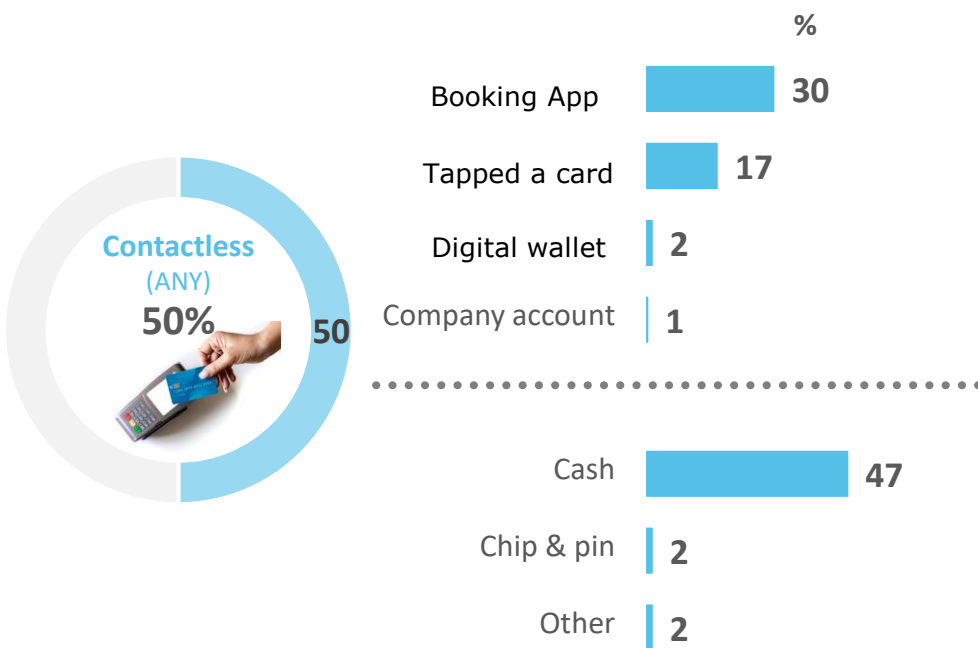
Payment methods: Still close on half of all taxi users use cash to pay but the use of cashless systems has increased significantly.

Base: All used taxi in past year - 818

Pre Covid restrictions



During Covid restrictions



Payment methods

Base: Taxi users during Covid - 427

	TOTAL	REGION				SAFETY		
		Dublin	Rest of Leinster	Munster	Conn/ Ulster	Safe	Not sure	Unsafe
<i>Base (unweighted):</i>	427	149	85	120	73	376	35*	16*
	%	%	%	%	%	%	%	%
Any contactless:	50	68	32	40	47	50	52	31
The app	30	51	15	22	16	31	28	22
Tapped a card	17	16	15	13	28	17	17	9
Google Pay	2	1	1	3	3	2	3	-
Company Account	1	-	1	2	-	0	4	-
Any contact								
Cash	47	28	66	56	51	46	45	61
Chip & pin	2	3	1	1	2	2	3	-
Other	1	1	-	3	-	1	-	8

With Covid restrictions
Only 1 in 4 still prefer to
 use **cash**



Pre Covid
 restrictions
 Used to pay

%



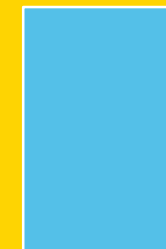
During Covid
 restrictions
 Prefer to pay

%

65



25



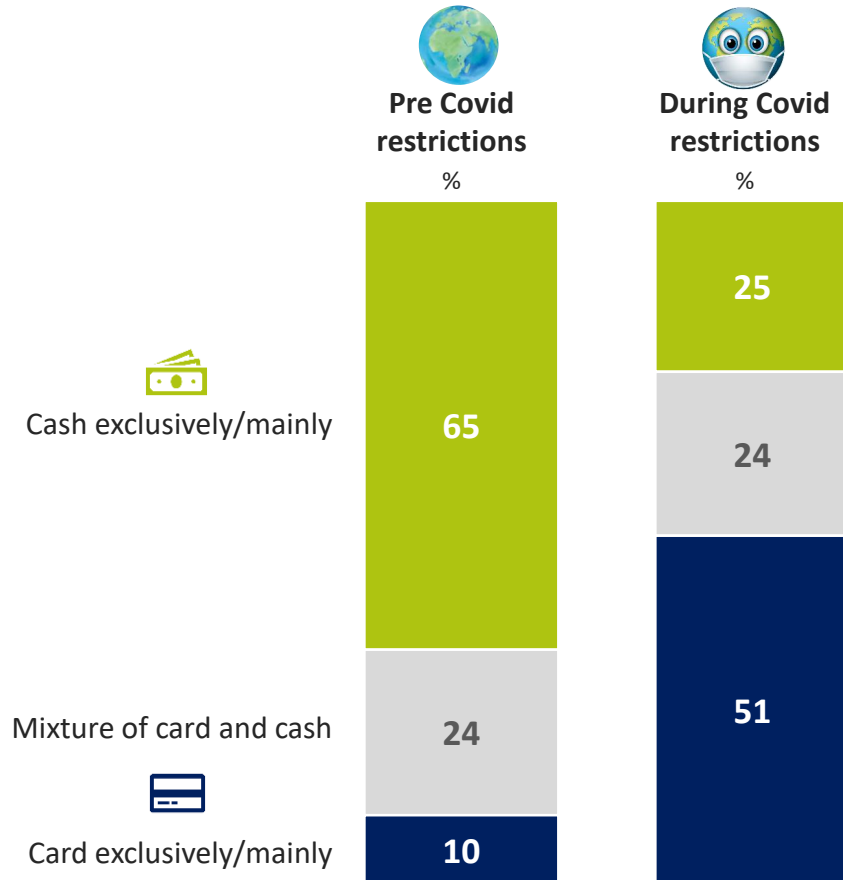
Q.21a Pre Covid, as a general rule how did you used to pay for taxi services?

Q.21b And now, how do you prefer to pay for taxi services now during the pandemic?

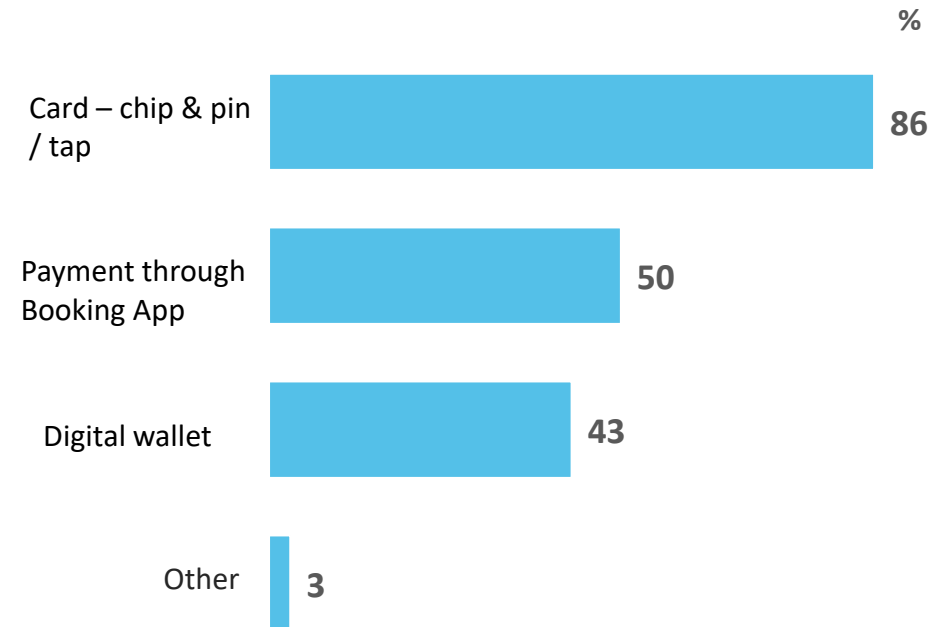
Payment methods: Clear evidence of a shift among taxi users and how they pay for their fare. There is widespread interest in having access to card payments in all taxis.

Base: All used taxi in past year - 818

How do taxi users generally pay for taxi usage?

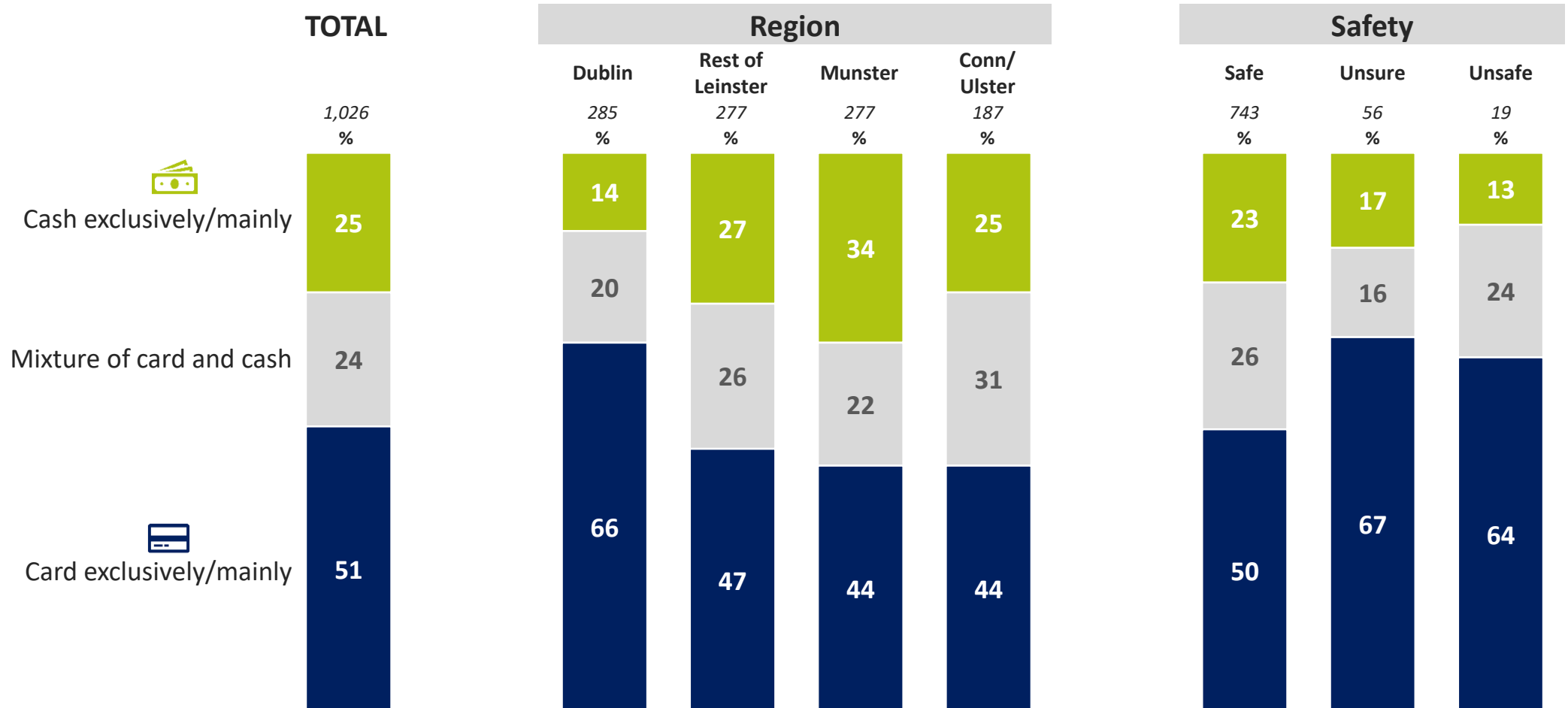


What payment types should be available?



Preferred method of payment now (living with Covid)

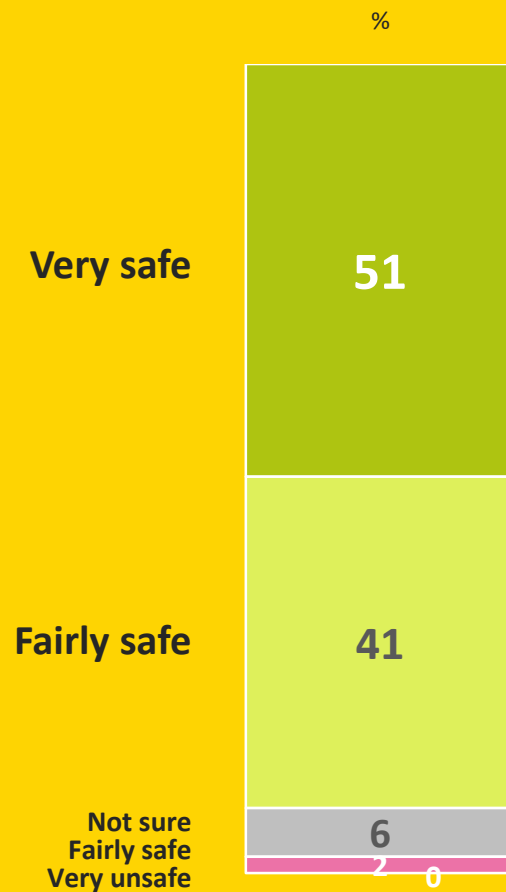
Base: All adults 1,026





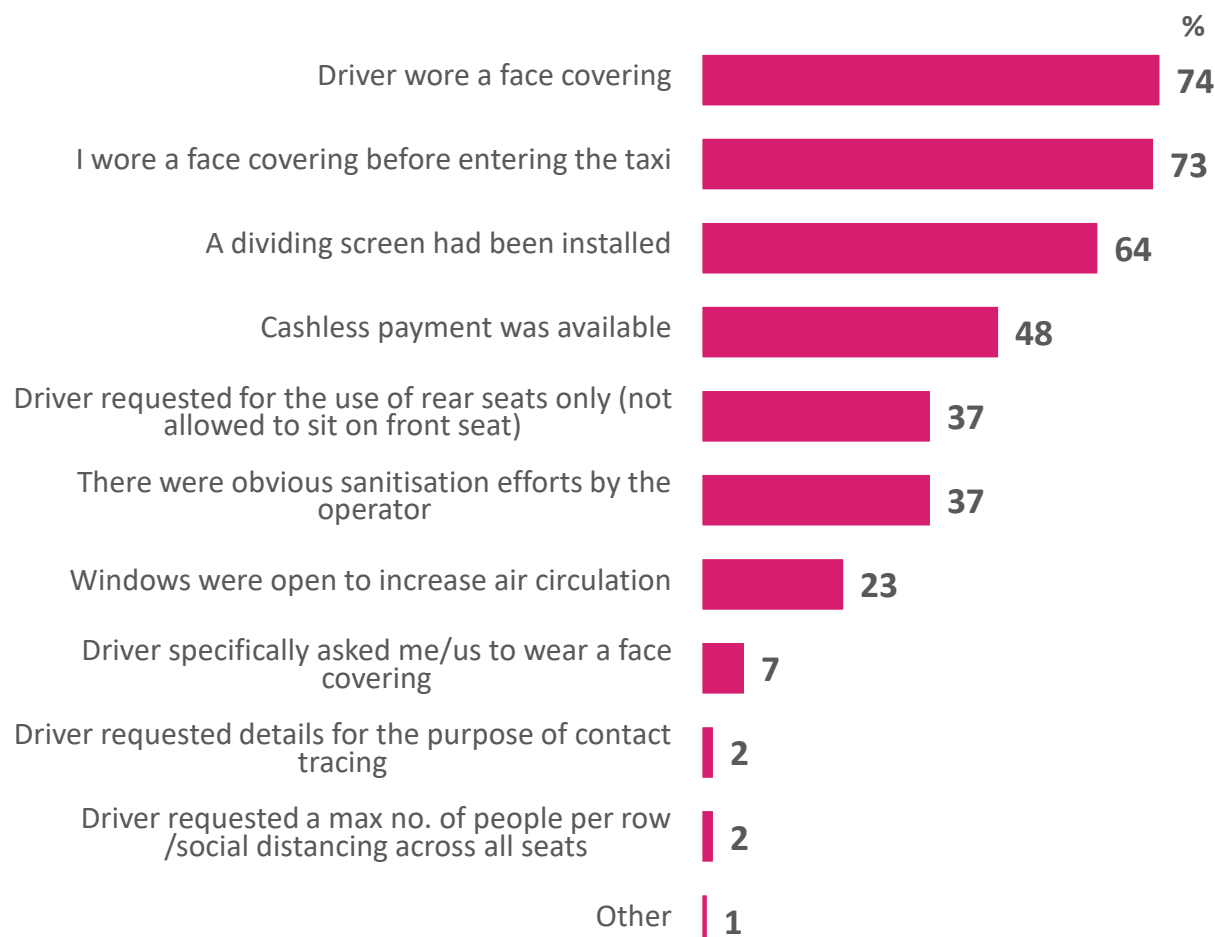
**Building confidence in safety
measures**

92%
felt safe
on their last taxi journey



Covid related measures: Face coverings and dividing screens dominate the Covid safety measures. Half reference that cashless payment is available.

Base: All used taxi during Covid - 427

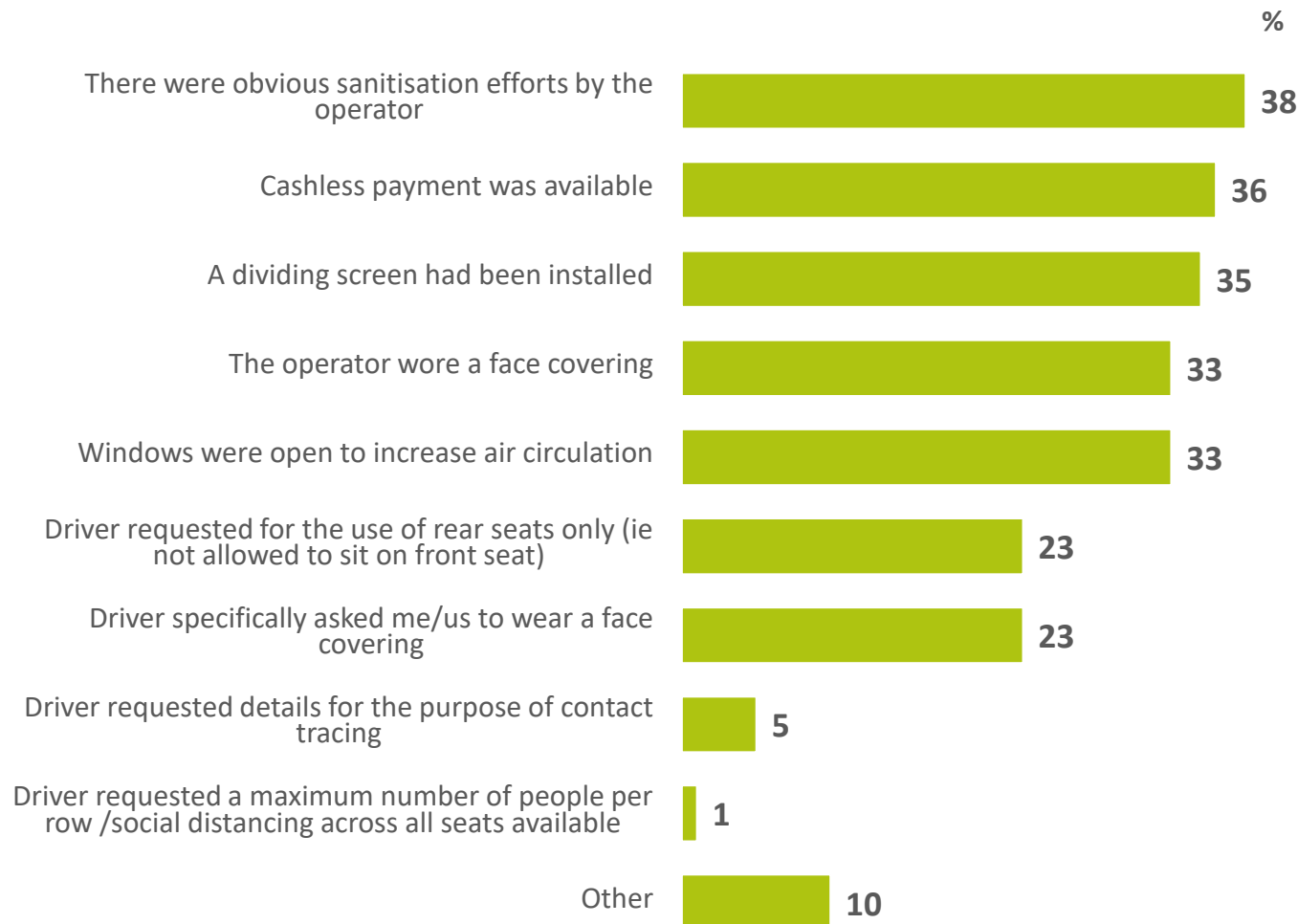


REGION				FEELING OF SAFETY		
Dublin	Rest of Leinster	Munster	Conn/ Ulster	Safe	Not sure	Unsafe
149	85	120	73	376	35*	16*
%	%	%	%	%	%	%
70	73	75	81	77	62	23
72	74	76	69	73	60	83
76	67	57	47	67	49	26
62	35	42	40	50	35	9
29	44	43	38	39	18	7
28	46	39	44	39	18	-
22	20	31	17	24	18	4
6	6	8	9	8	5	-
-	2	2	4	2	-	-
-	4	3	-	2	-	-
-	3	1	2	1	2	10

* Extremely small base sizes. Caution.

Aspect that would make passengers feel safer

Base: All feeling fairly safe/unsure/unsafe



FEELING OF SAFETY					
Fairly safe	Not sure	Fairly unsafe	Very unsafe	NET SAFE	NET UNSAFE
333	56	17	2	333	19
%	%	%	%	%	%
36	42	73	53	36	71
34	46	35	100	34	41
32	44	68	53	32	67
32	34	64	53	32	63
32	30	49	53	32	49
21	27	56	-	21	51
20	31	55	-	20	50
4	8	19	53	4	22
1	1	-	-	1	-
11	4	16	-	11	14

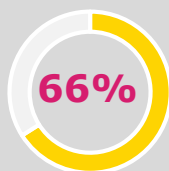


Key findings

Taxi usage



- Only **1%** are very regular taxi users (compared with 3-4% for tram or train and 18% for bus). Still 74% use at one time or another.



of taxi users are **using the service less** often than pre-Covid. This is mainly because of reduced need but still close on half of these users are

making the decision to use the service less because they want to minimise the risk of contracting Covid.

- Only **38%** of adults (of the possible 74% who are users) have experience of taxi usage during Covid. 40% still have to be encouraged back.

Safety Measures



- Taxi customers have witnessed a lot of safety measures now in place including driving wearing face coverings (74%) and a dividing screen between the driver and passenger (64%). Using a cashless system to pay also evident (48%).
- Cashless options and screen dividers more evident in Dublin.
- Importantly, **92%** of taxi users during Covid **felt safe**.



Looking ahead



- There is no evidence to indicate that taxi usage will increase by any significant degree before year end (and this data was collected before Level 5 was announced).
- Dublin is in a stronger position with regard to implementing safety measures that help build confidence in perceptions of taxi safety.
- However, as leisure remains the main 'need' for taxi usage and this is so limited currently (and still will be limited after the 4th December), **a recovery for taxi demand seems likely to be slow**.
- Highlighting the fact that recent **users felt safe**, the **convenience of apps** as well as other **safety measures** implemented (dividers, cashless transactions, deep cleaning) for the industry must be important to continue to build trust. The main need currently is more for **shopping and appointments**.

Key usage changes

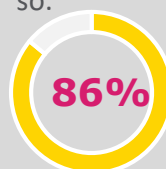


- Among current taxi users, there has been a definite **shift towards ordering the taxi by phone or through an app**. Also the journeys now seems shorter now than pre Covid (perhaps less traffic having an impact here).
- Day of week usage is slightly more broadly based across the week although Friday and Saturday continued to dominate. **Most usage is after 6pm**. (and so not so different to pre-Covid).
- The **role for taxi is mainly leisure** but this has decreased in importance (albeit remaining the most important one) **while visiting friends and family and shopping have increased**.

Payment options



- There has been a definite decline in the usage of cash to pay for taxi journeys. Half used contactless on last occasions (rising to **68%** in Dublin).
- While two thirds typically used cash to pay, now only a quarter have a preference to do so.



of taxi users now believe that all taxis should provide a card as a payment option

Building trust



- For those who are not feeling as safe with taxi usage, the priorities in order of importance are :-
 - Obvious signs of sanitation of the vehicle
 - Dividing screens
 - Driver wears a face covering
 - Driver requests the passenger to wear a face covering
 - Windows open (if possible)
 - Cashless payment being available.