



Údarás Náisiúnta Iompair
National Transport Authority

COVID Impact Research **Wave 2** - Taxi Consumers

National survey
February 2021

Data gathered during Level 5
Government Restrictions





Introduction

Introduction

- This report details the findings of a representative survey of taxi users in Ireland (February/March 2021). The survey is the second one in the series (October 2020).
- It sets out to understand current and expected usage with an exploration of Covid measures that build confidence. The information is to help plan for the future of the industry.
- The survey was undertaken online through the B&A Acumen panel.
- A survey of taxi operators has been undertaken by phone in tandem, covering a similar topic and aimed at understanding the impact Covid has had on taxi usage.



Objectives

The core objective of this survey was to answer the question below:

What impact has Covid had on taxi users and the future of the industry?

- This research covered:
 - ❖ 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 might allay any anxiety around Covid.



Methodology

- A representative survey of taxi users in Ireland.



Sample Size:

1,015 adults
712 Taxi users



Quota Controls:

Quota controls in place for gender, age, region and area to match demographics.

Weights:

Population weights have been added to ensure representivity and to allow us estimate numbers of taxi users as well as percentages.



Fieldwork Dates:

25th February to 9th March, 2021.
Full Level 5 lockdown.



B&A Acumen Panel

Survey was conducted online by inviting relevant demographic cohorts from the membership through quotas to participate.

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Reeling in 2020/2021...



March 2020

Government close schools on Friday 13th with a view to opening on 29th March....



April/May 2020

Two months of lockdown. Office workers work from home while parents continue home schooling. Restaurants, pubs and non-essential retail outlets remained closed.



June 2020

Government's roadmap to reopening the country is underway: shopping centres & restaurants reopen under strict guidelines. Also in this month, we have a new Government.



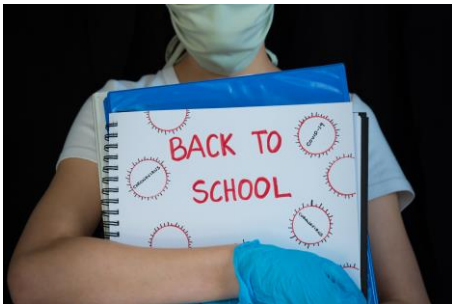
July 2020

Personal services, such as hairdressers and barbers, and creches open once again, and some employees return to the office.



August 2020

Preparations underway for the return to school. Some slight sense of normality with more people dining out, etc.



September 2020

Kids go back to school. Government announce new 5 Level plan, later moving Donegal & Dublin into Level 3.



Oct - Nov 2020

The country is moved to Level 3 restrictions, with only outdoor dining allowed for restaurants/bars, etc. Then, on 21st October, the country is moved to Level 5 for 6 weeks (until 1st Dec) as all non-essential retail and restaurants close.



December 2020

Non-essential retail outlets and services (e.g. hairdressers) opened on 1st Dec, but on 24th country moved back into Level 5: all restaurants, bars & non-essential retail outlets/services closed once again.



Jan – Mar 2021

Case numbers incredibly high in January leading to extended Level 5 lockdown for Q1 2021, with all restaurants restricted to delivery and non-essential retail/services closed. Schools partially reopened in March for the youngest and oldest children.



1. Taxi usage in context of public transport usage in general

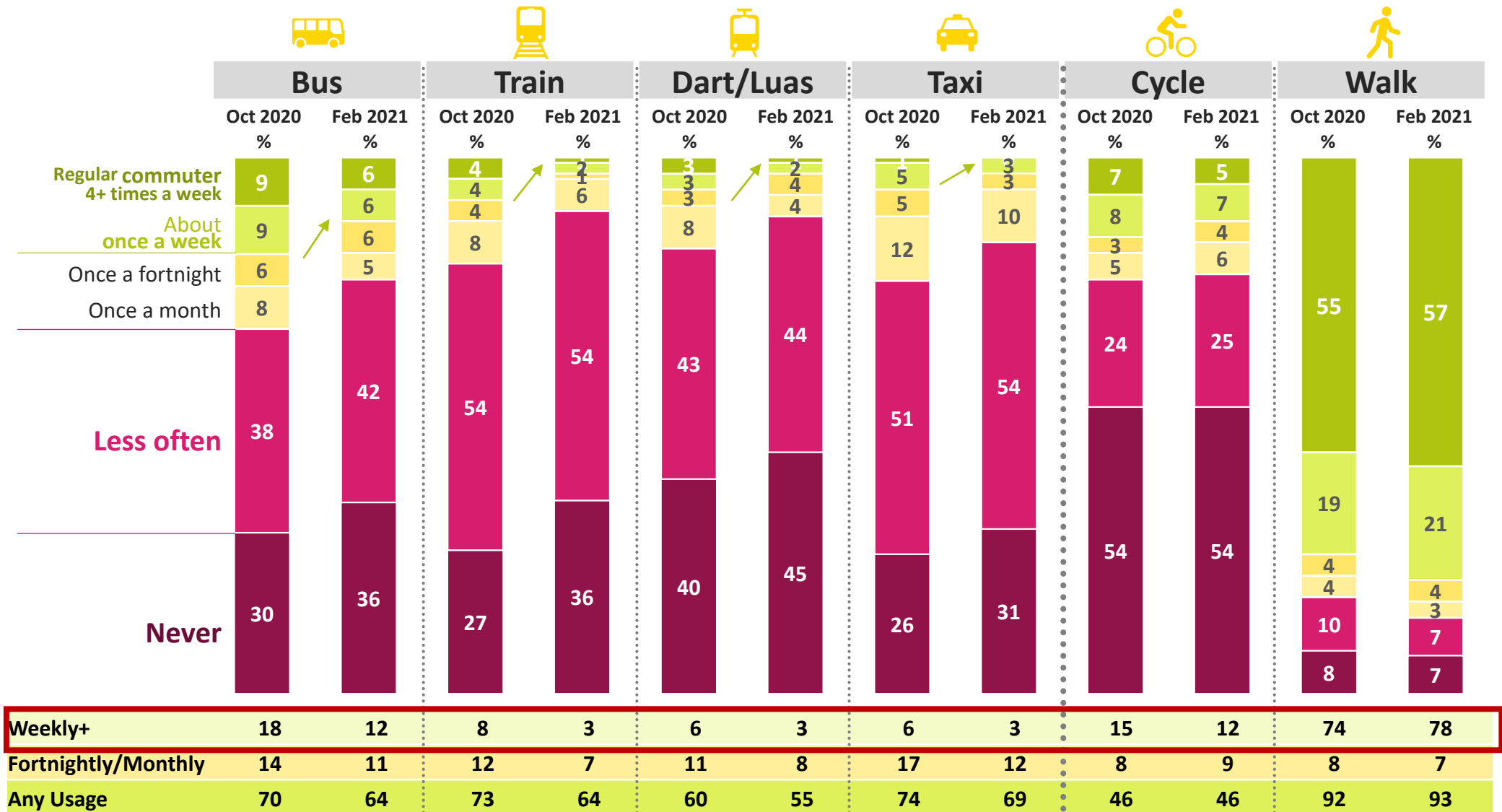


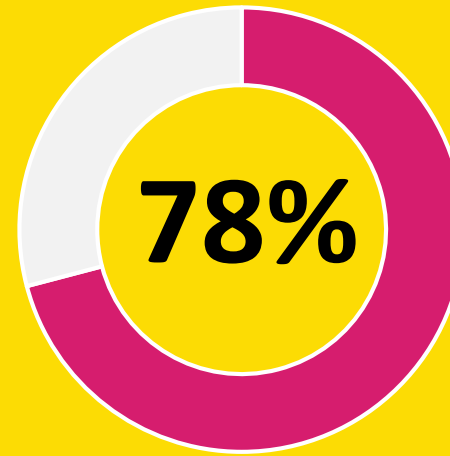
**Evidence of a decline in
taxi usage compared
with October 2020.**

**69% (74%) of adults
currently use taxi with
only 3% (6%) *who now* use
weekly**

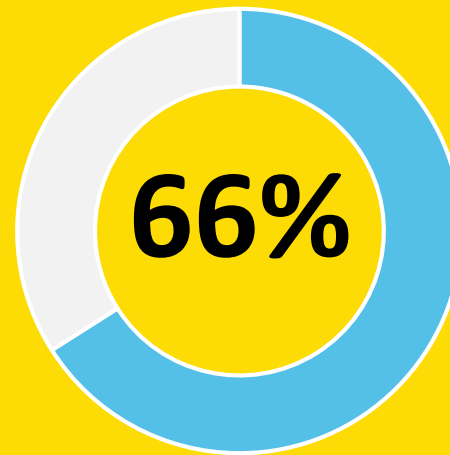
() = Oct 2020

Weekly usage of all forms of public transport have declined since October 2020. **Walking** continues to be the main form of commuter transport.



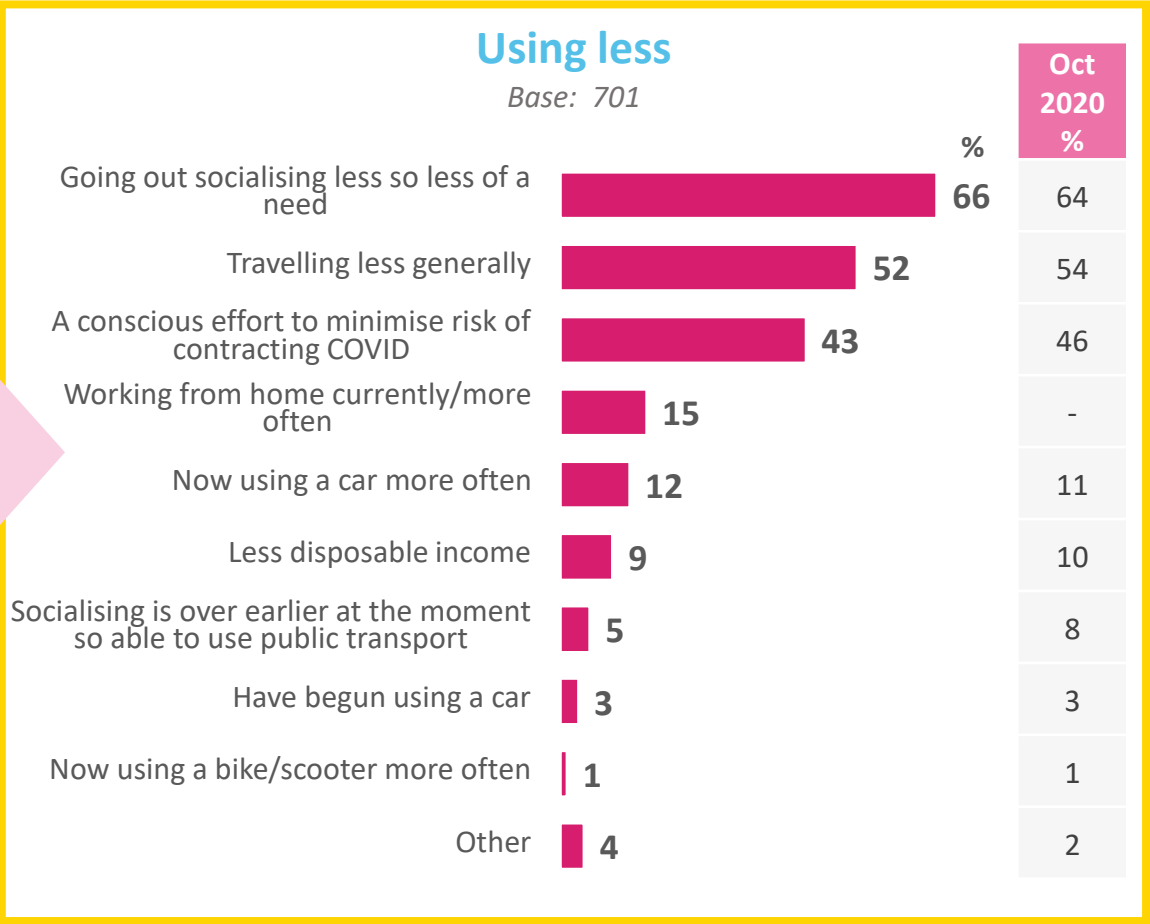
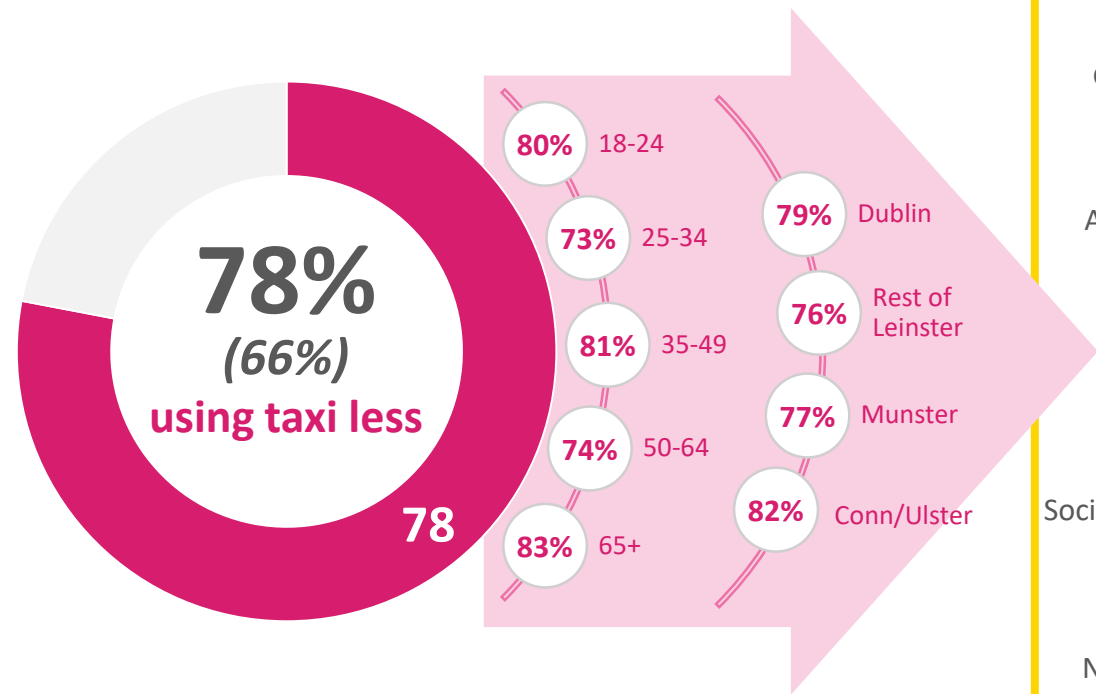


are **using**
a taxi less



of those
using a **taxi less**
are doing so as they
are **going out**
socialising less

Almost 8 in 10 taxi users using taxi **less** often. 4 in 10 are making a conscious effort to avoid using taxis to minimise risk of COVID contraction

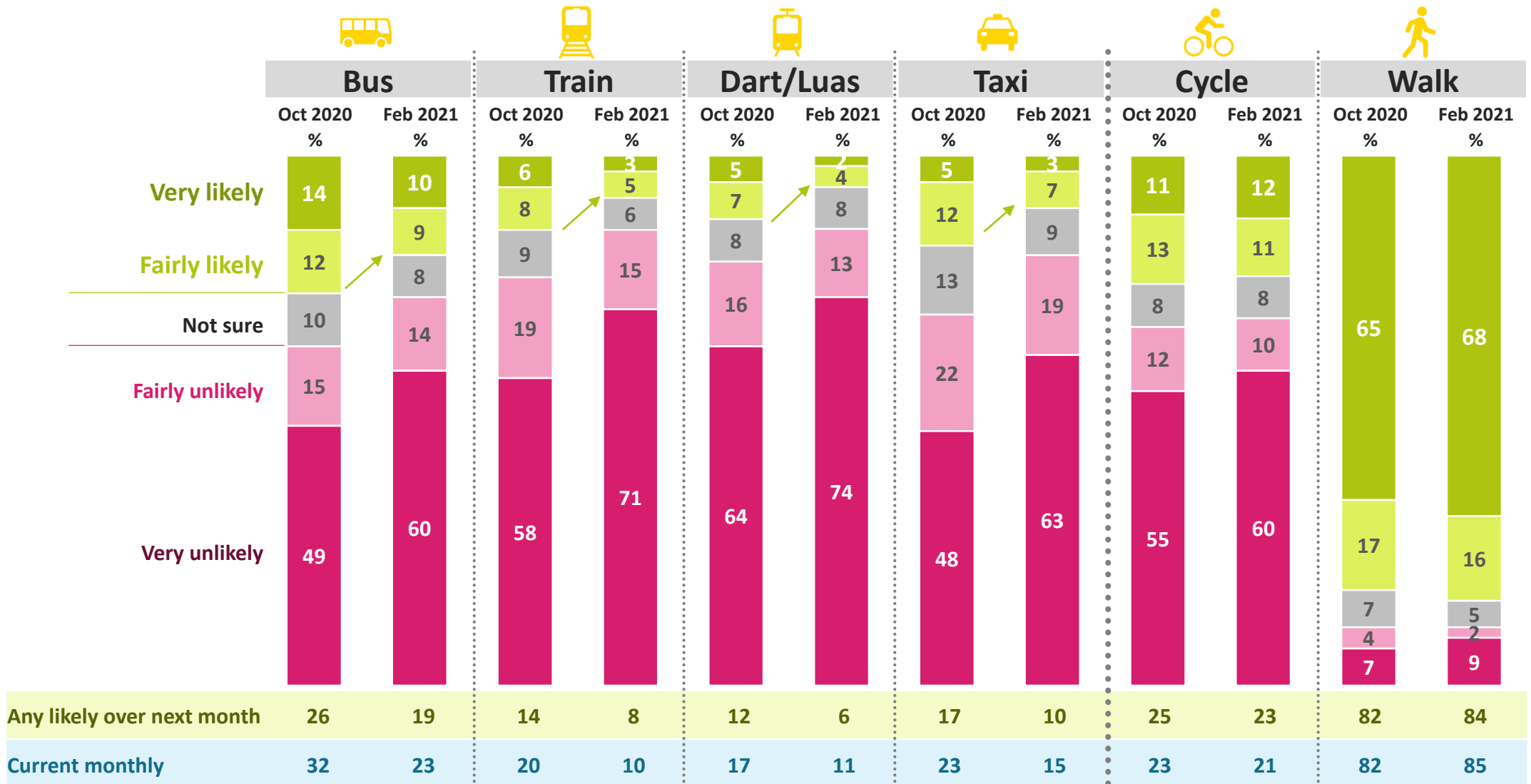


() = Oct 2020

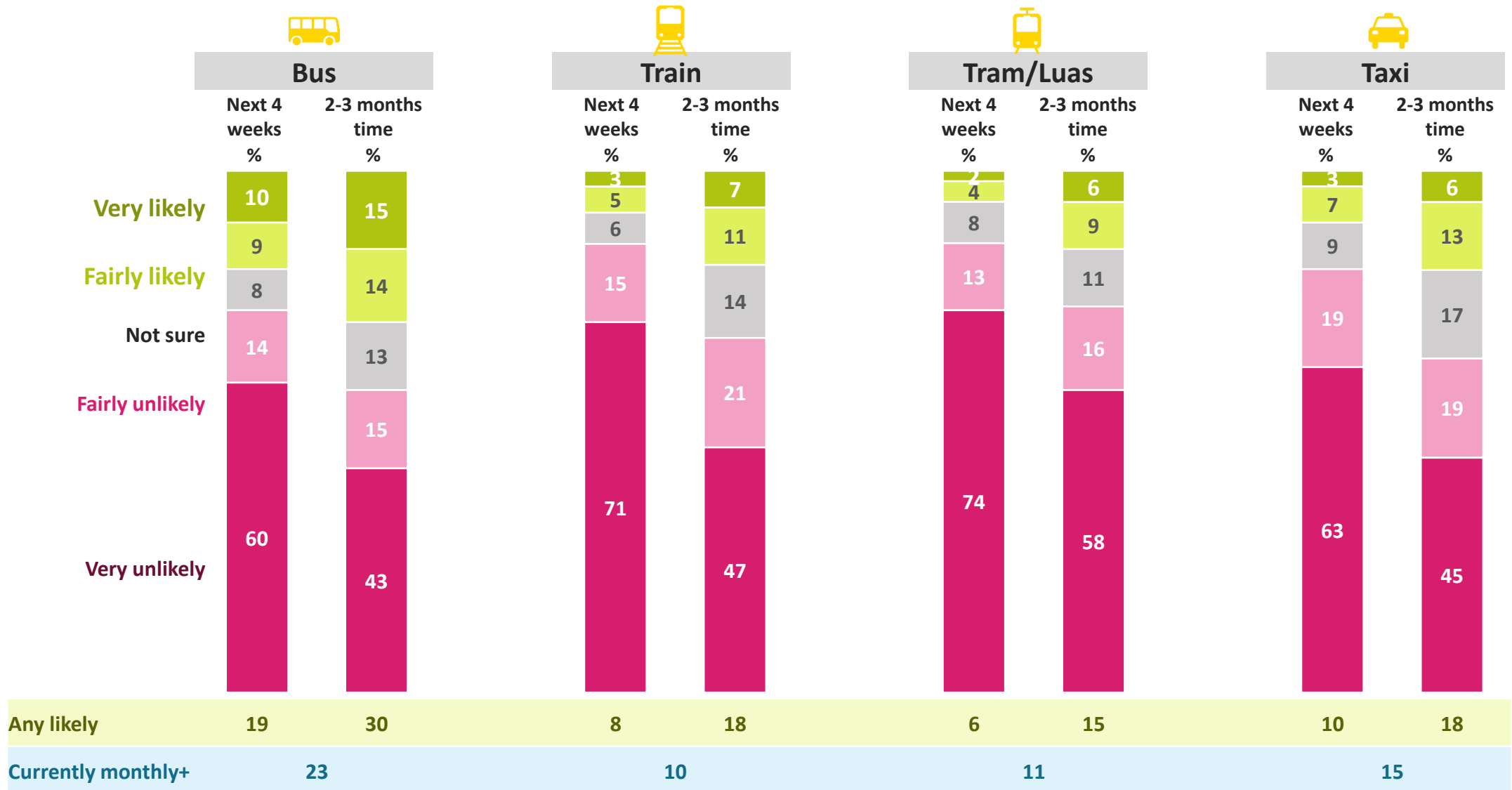


The evidence suggests the
public **are not**
anticipating any
increase in PT
usage for about three
months.

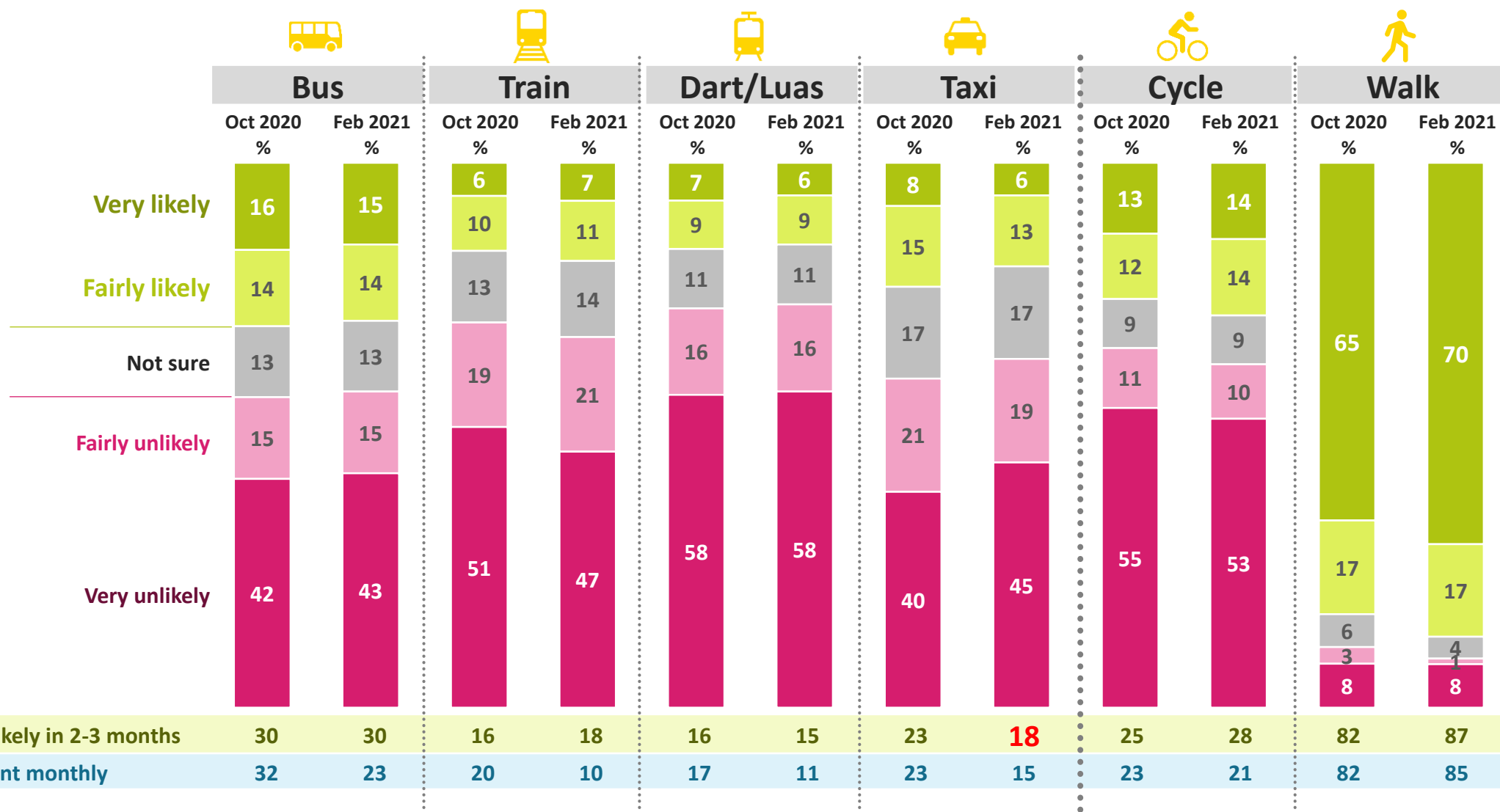
PT usage projections over next month are depressed when compared with projections last October and compared with current usage



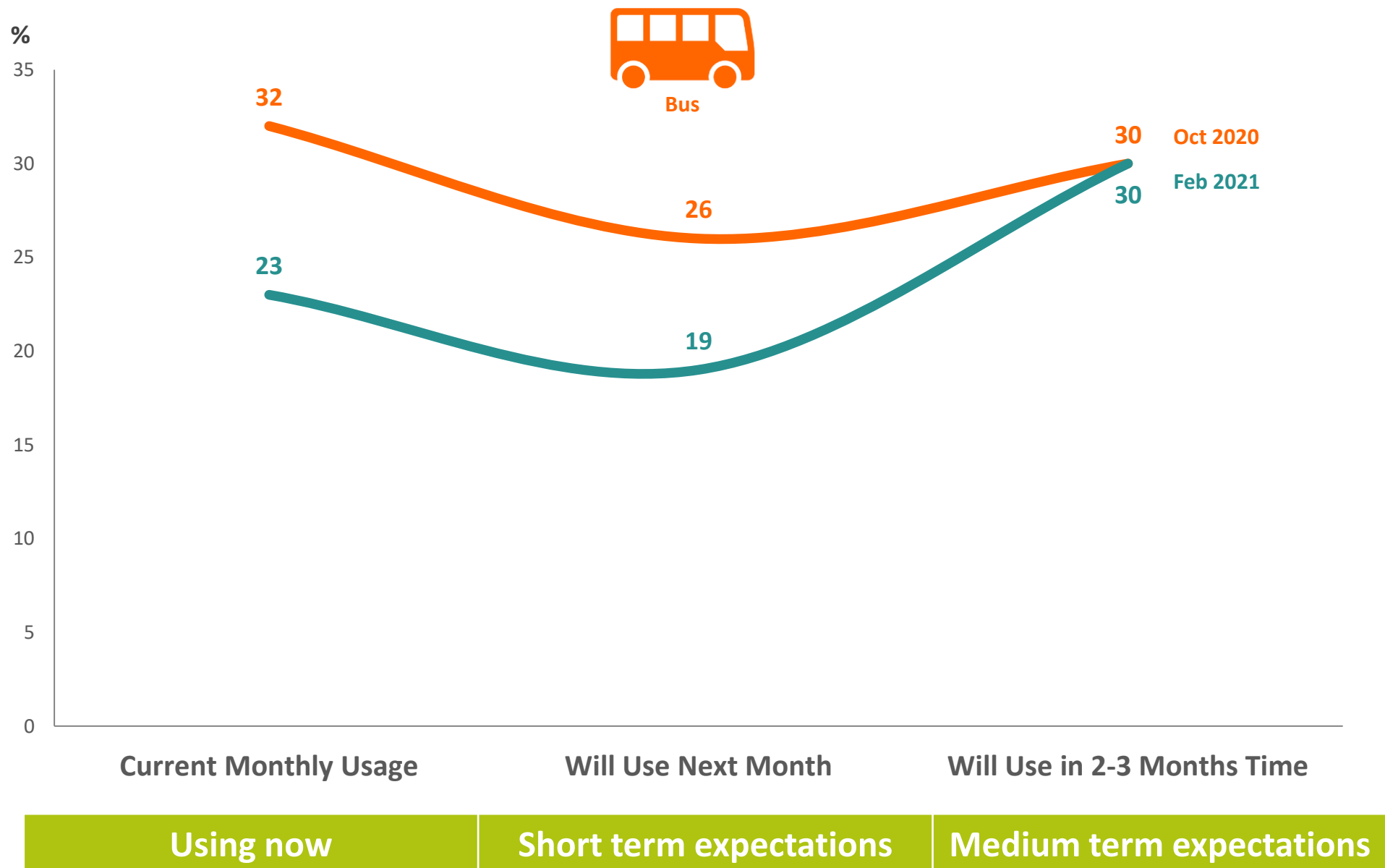
Looking forward, there is evidence of a positive shift in potential usage in 2-3 months time.



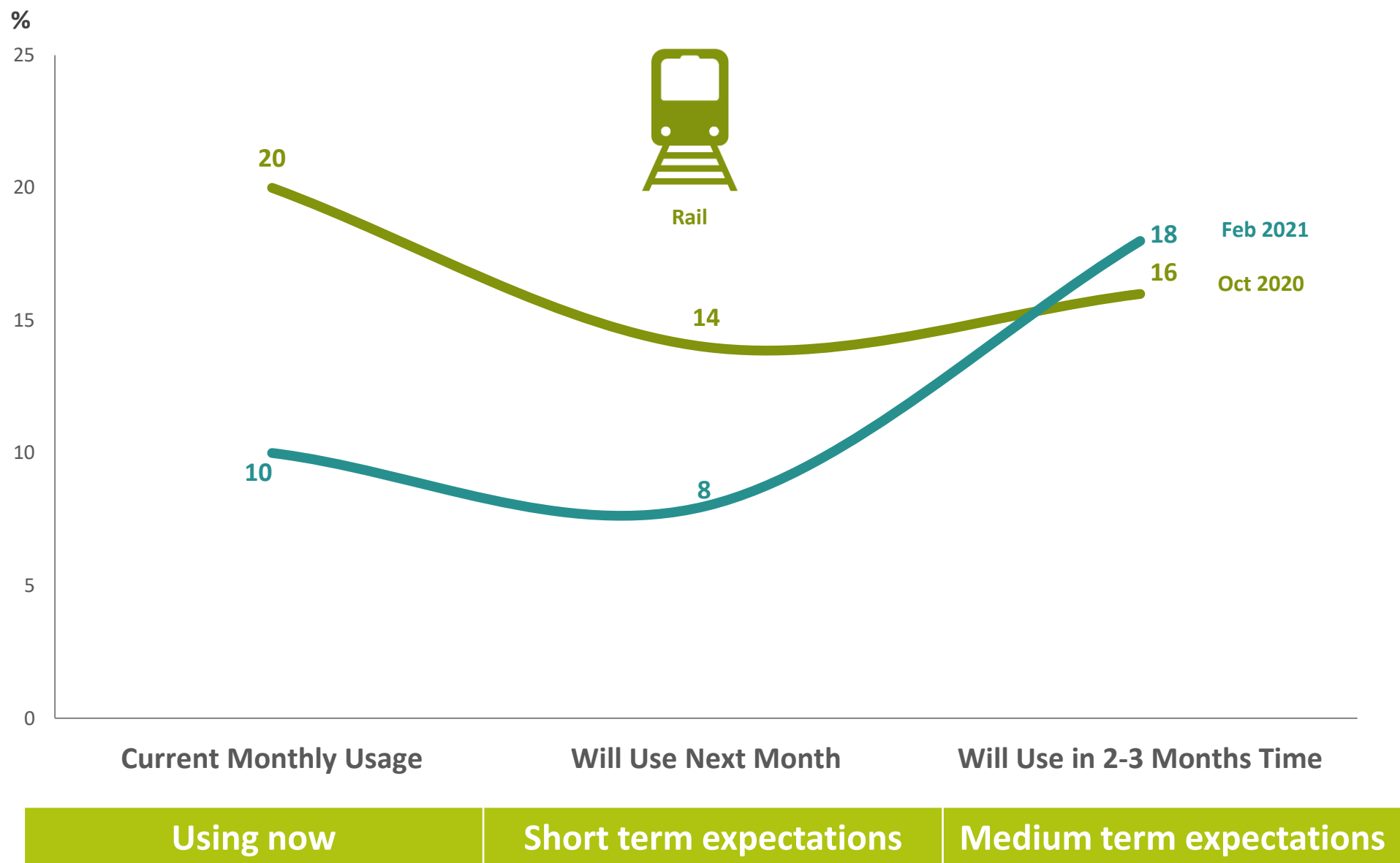
Anticipated PT usage in 2-3 months time is very similar to that recorded last October when those projections would have held the status quo.
Encouragingly there is now an anticipated lift in usage from a lower starting point.
Worryingly taxi usage does not bounce back to the same level.



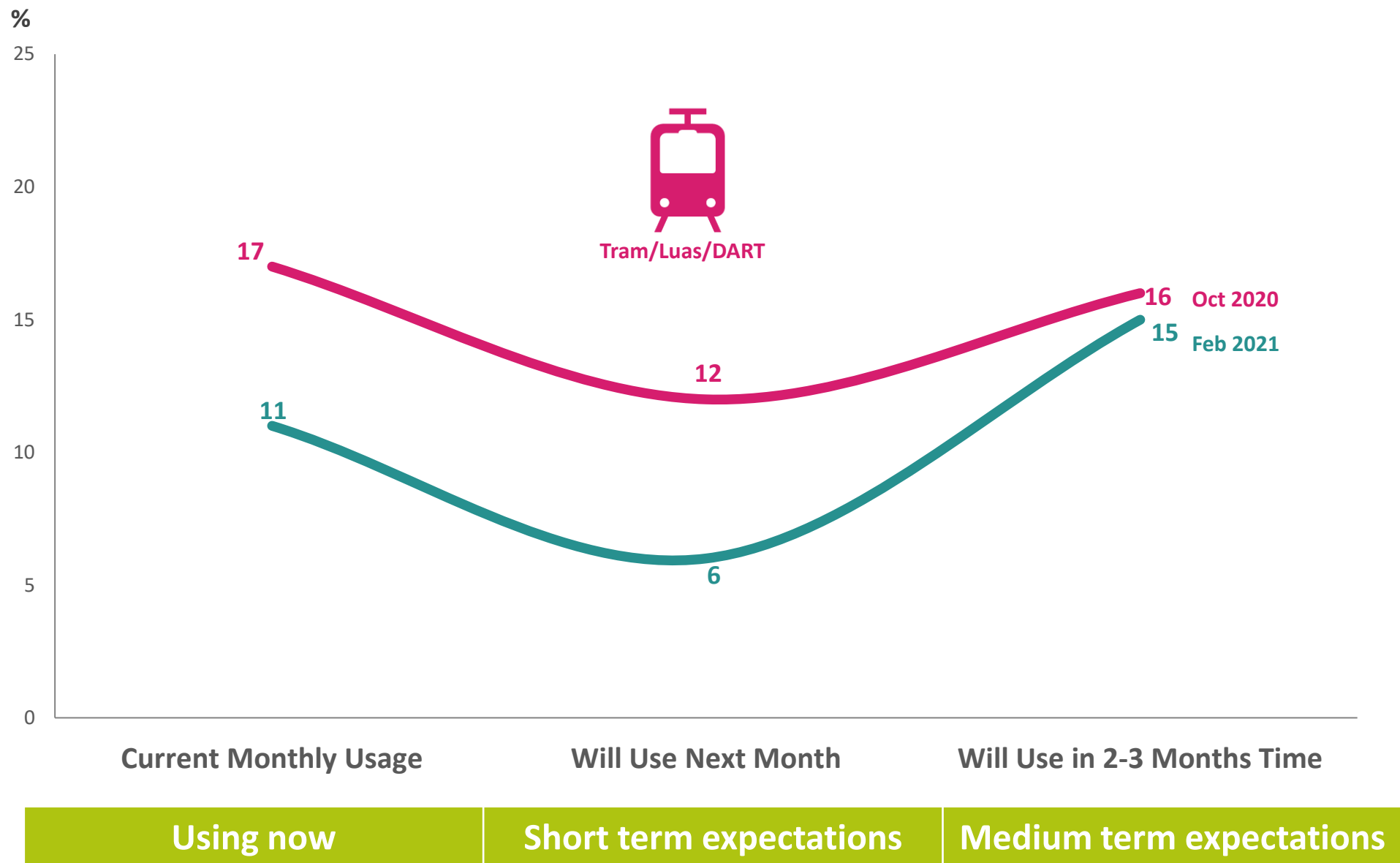
Bus: Current and projected usage:
Lower usage for the next month but then a lift to previous expected levels



Rail: Current and projected usage:
Lower usage for the next month but then a lift to previous expected levels

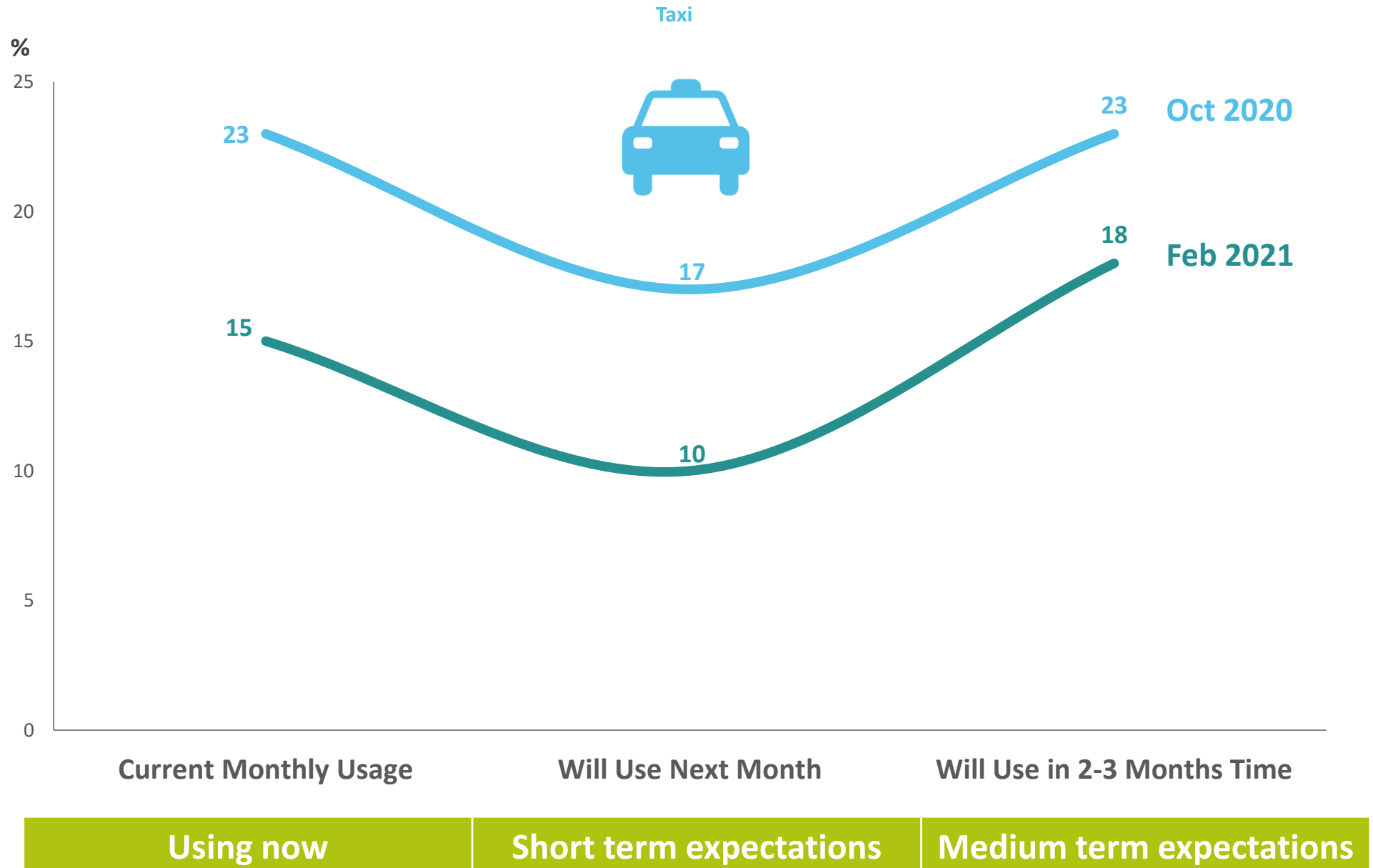


TRAM: Current and projected usage:
Lower usage for the next month but then a lift to previous expected levels

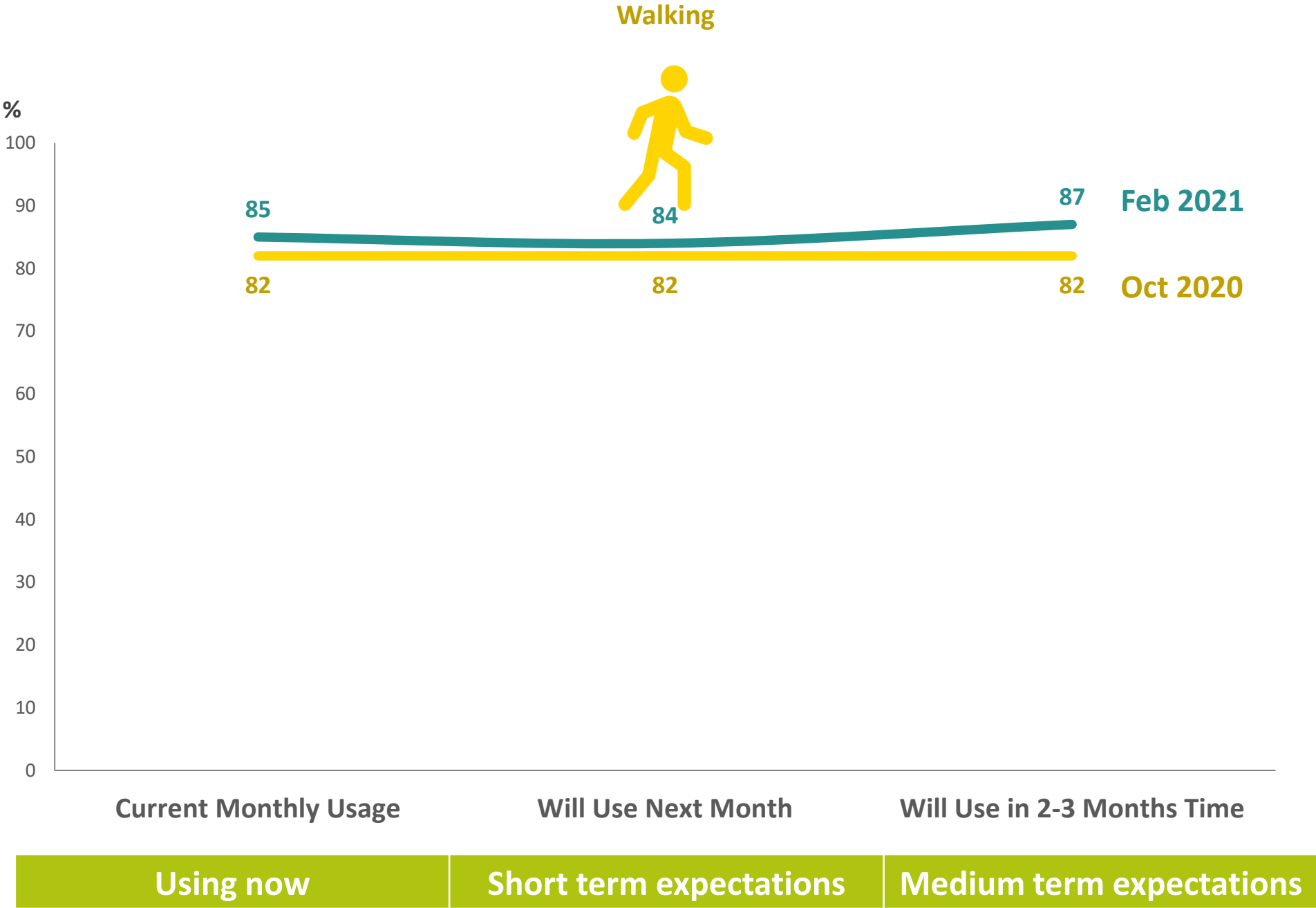


Taxi : Current and projected usage:





Lower usage for the next month but the lift other PT modes experience is considerably lower and indeed not much higher than current levels.



Walking: Current and projected usage:



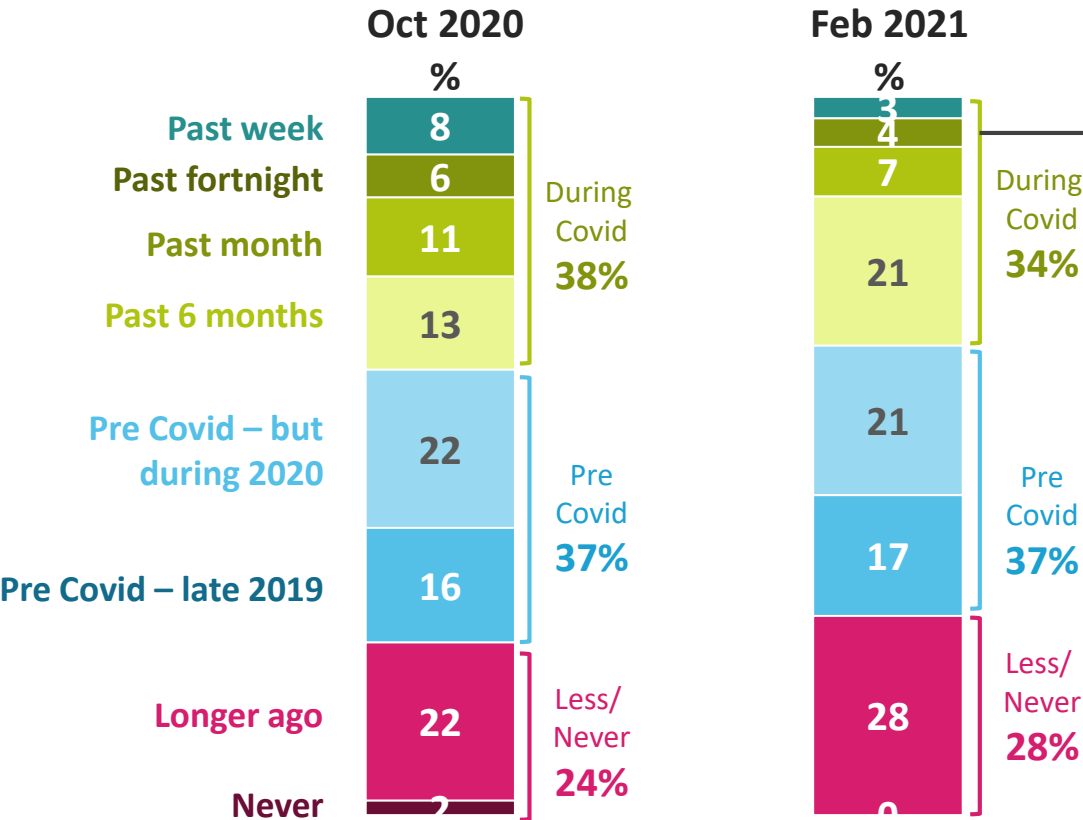
Evidence that slightly more of less regular users will return to usage in 2-3 months time. Tram users showing most potential for growth among the core weekly user base.

	 BUS USERS			 TRAIN USERS			 TRAM USERS			 TAXI USERS		
	Weekly+	Less	Never	Weekly+	Less	Never	Weekly+	Less	Never	Weekly+	Less	Never
Base (unweighted):	132	538	345	32	624	359	32	523	460	34	678	303
	%	%	%	%	%	%	%	%	%	%	%	%
<i>Very/fairly likely to use...</i>												
Next four weeks	81	16	1	73	9	1	54	8	1	90	10	1
In 2-3 months time	87	32	6	79	23	4	78	22	3	89	23	2

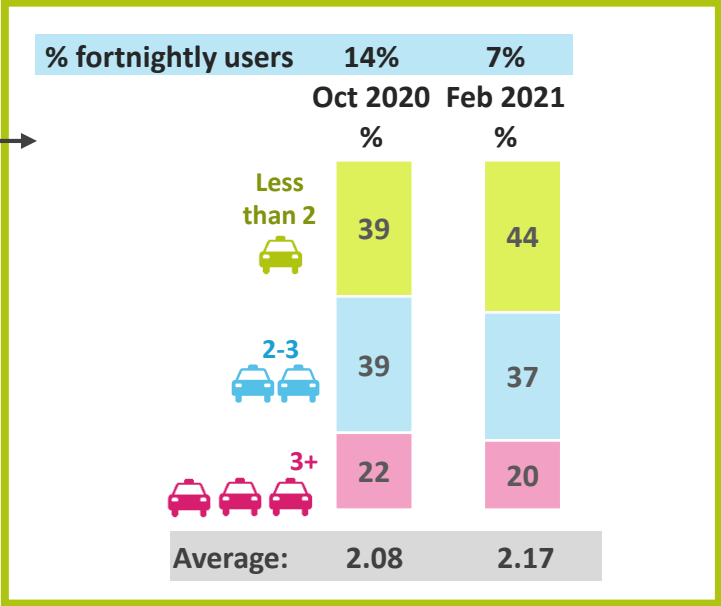


2. How has consumer demand changed?

34% have experience of using a taxi during the Covid pandemic (similar to previous wave) but only 1 in 14 used a taxi in past fortnight compared with 1 in 7 in October. While average number of usage occasions is slightly higher, this is from half the base that was available previously.

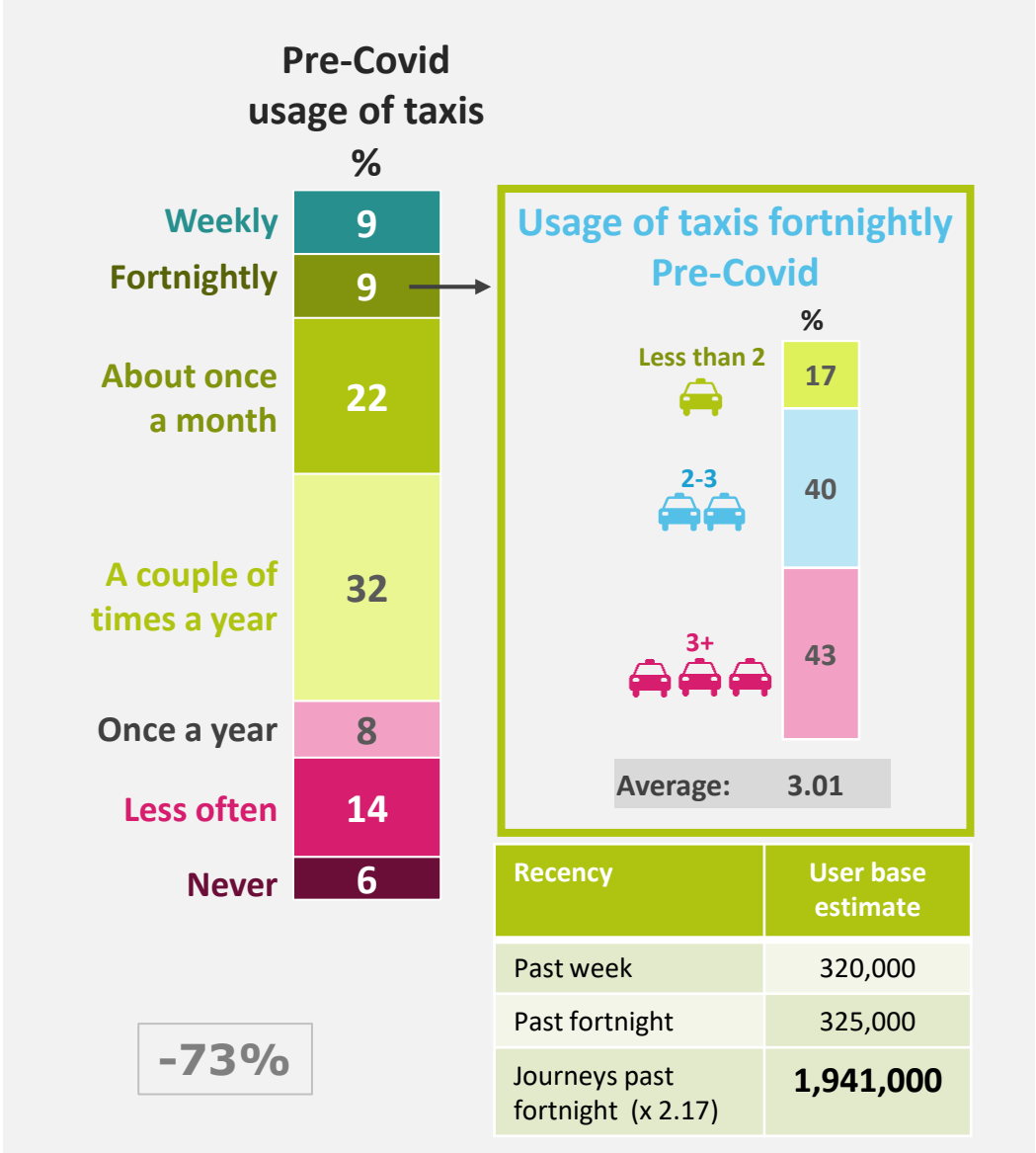
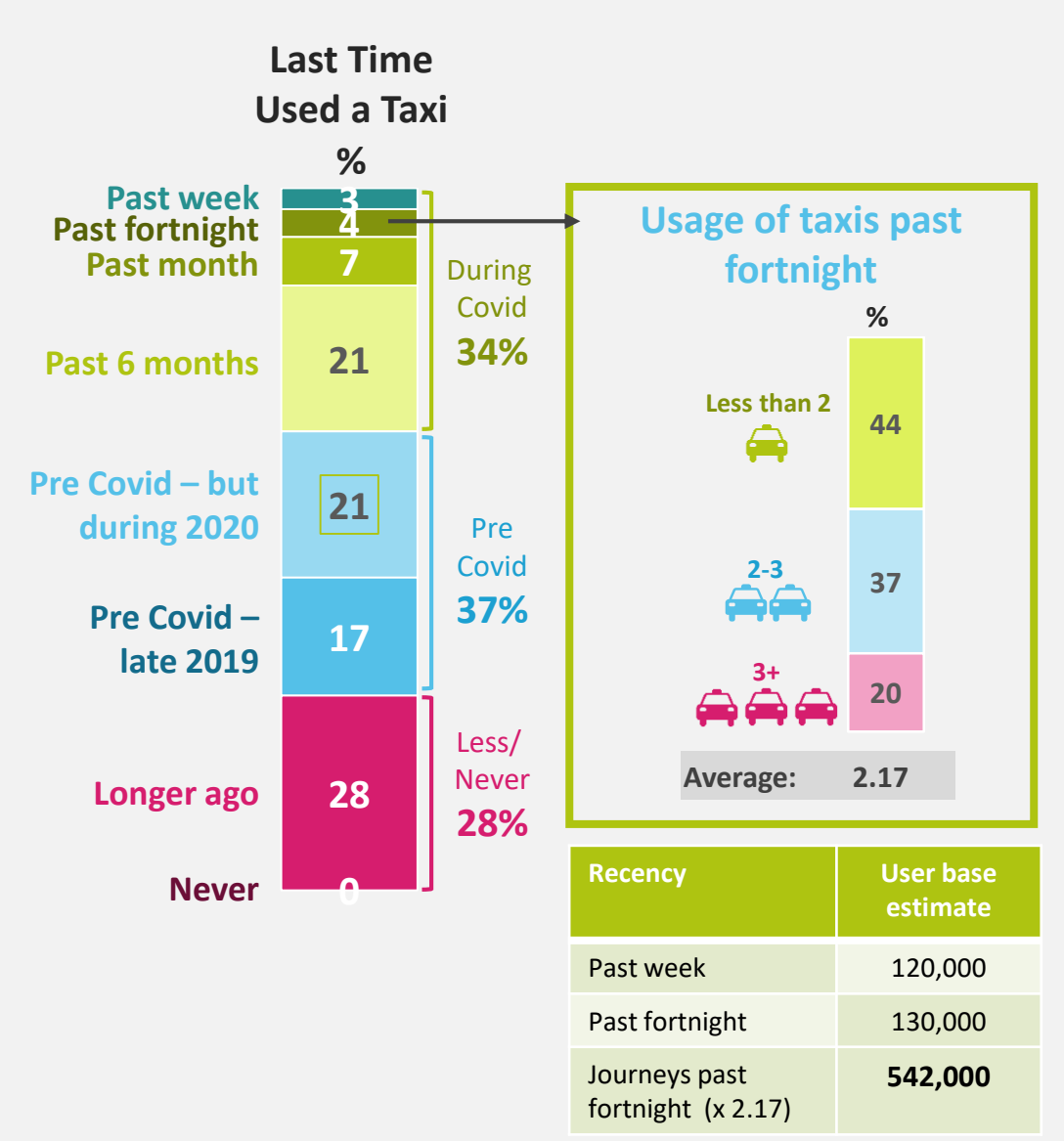


No. of taxis taken in past fortnight



Recency	User base estimates	
	Oct 20	March 21
Past week	300,000	120,000
Past fortnight	225,000	130,000
Past month	425,000	250,000
Journeys past fortnight (x average number)	1,092,000	542,000
	-50%	

Current vs pre Covid consumer usage estimates: Consumer estimates now 73% lower than pre-covid



Taxi usage comparisons. Pre-ordering a taxi is holding firm as the most dominant ordering approach. Evidence to suggest journeys are shorter than previously also.

Duration of journey

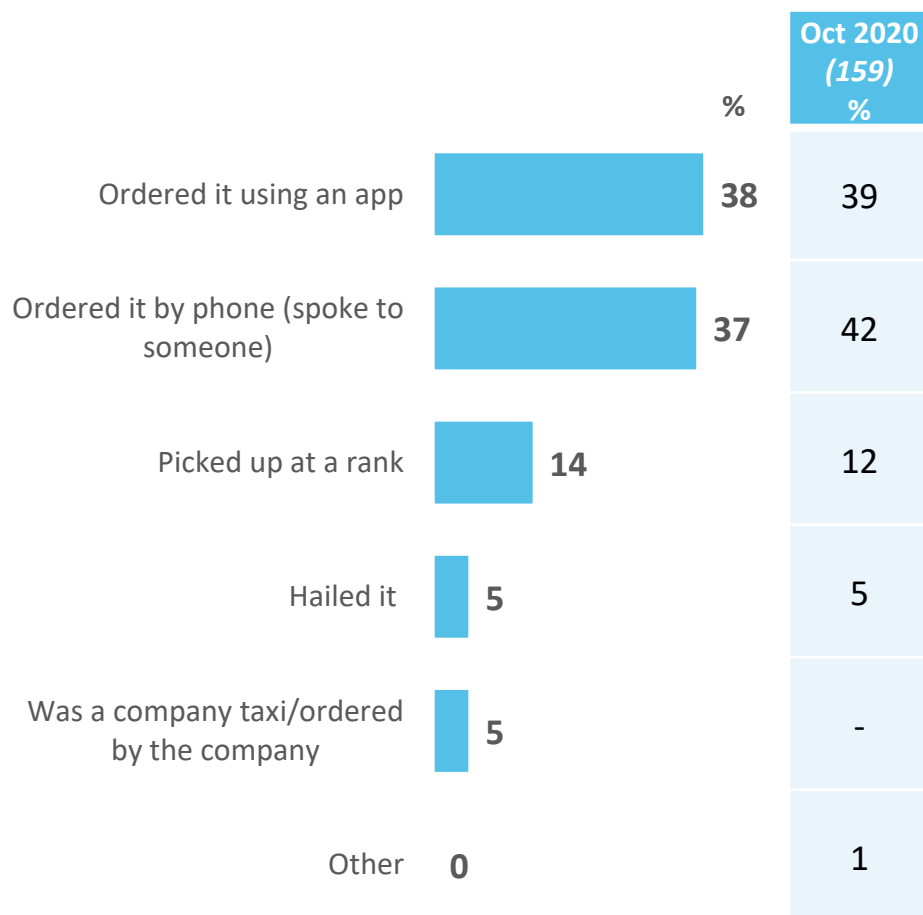
	Past Fortnight	
	Oct 2020	Feb 2021
<i>Base (unweighted):</i>	159	79
	%	%
Less than 5 minutes	6	14
5-10 minutes	35	28
11-15 minutes	32	29
16-20 minutes	17	17
Over 21 minutes	10	12

Method used to get taxi

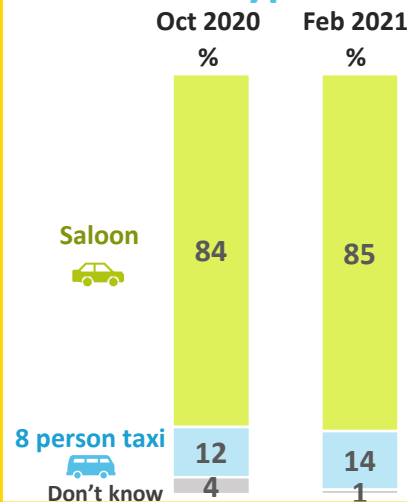
	Past Fortnight	
	Oct 2020	Feb 2021
<i>Base (unweighted):</i>	159	79
	%	%
Ordered it by phone (spoke to someone)	42	37
Ordered it using an app	39	38
Picked up at a rank	12	14
Hailed it	5	5
Booked by my employer/company	-	5
Other	1	-

Recent taxi usage norms: App and phone usage remains most common way to access a taxi currently. Friday is the most popular day with evidence of a shift towards daytime usage.

Method used to get taxi

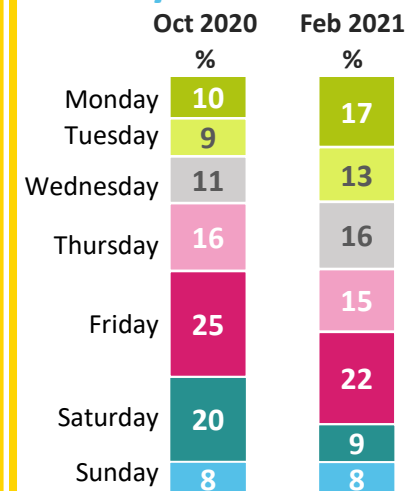


Vehicle type

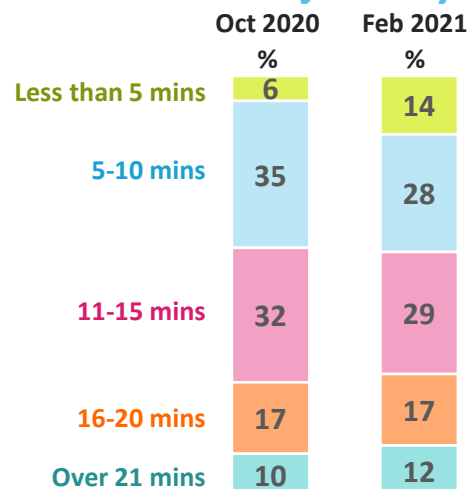


16%
of taxis used
had
wheelchair
access

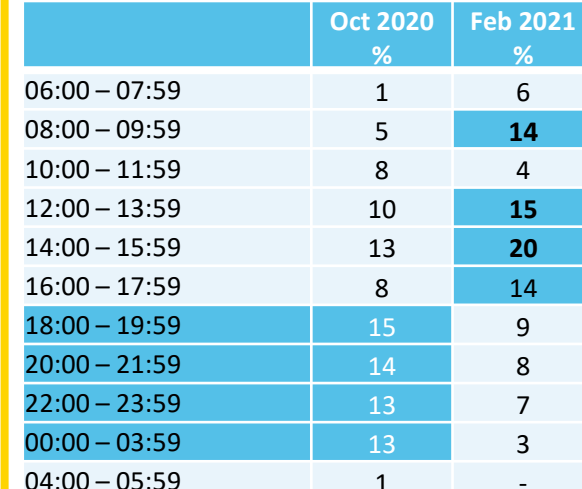
Day of week



Duration of journey



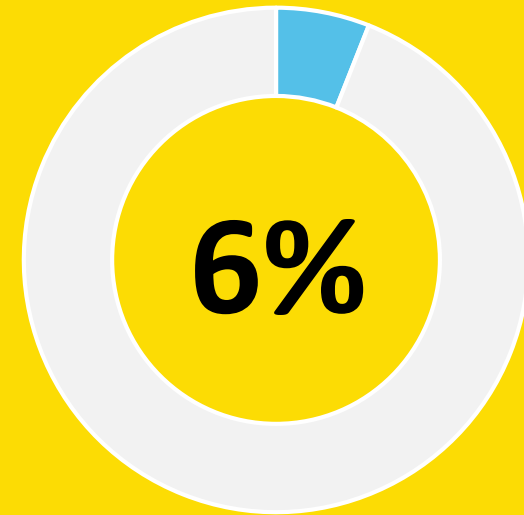
Time of day



Base: All used taxi in **past fortnight**.
Reference to most recent journey



Only



**used a taxi after
midnight**

Taxi usage comparisons. Fridays and between noon and 7p.m the most popular time slots.

Day of week used over past fortnight

	All people taking taxi in past fortnight
<i>Base (unweighted):</i>	79
	%
Monday	23
Tuesday	19
Wednesday	24
Thursday	24
Friday	37
Saturday	19
Sunday	8

Time of day taxi used over past fortnight

	All people taking taxi in past fortnight
<i>Base (unweighted):</i>	79
	%
06:00 – 07:59	8
08:00 – 09:59	15
10:00 – 11:59	8
12:00 – 13:59	22
14:00 – 15:59	29
16:00 – 17:59	21
18:00 – 19:59	18
20:00 – 21:59	10
22:00 – 23:59	8
00:00 – 03:59	5
04:00 – 05:59	1

Share of estimated journeys in past 2 weeks and across time of day

Day of week used over past fortnight

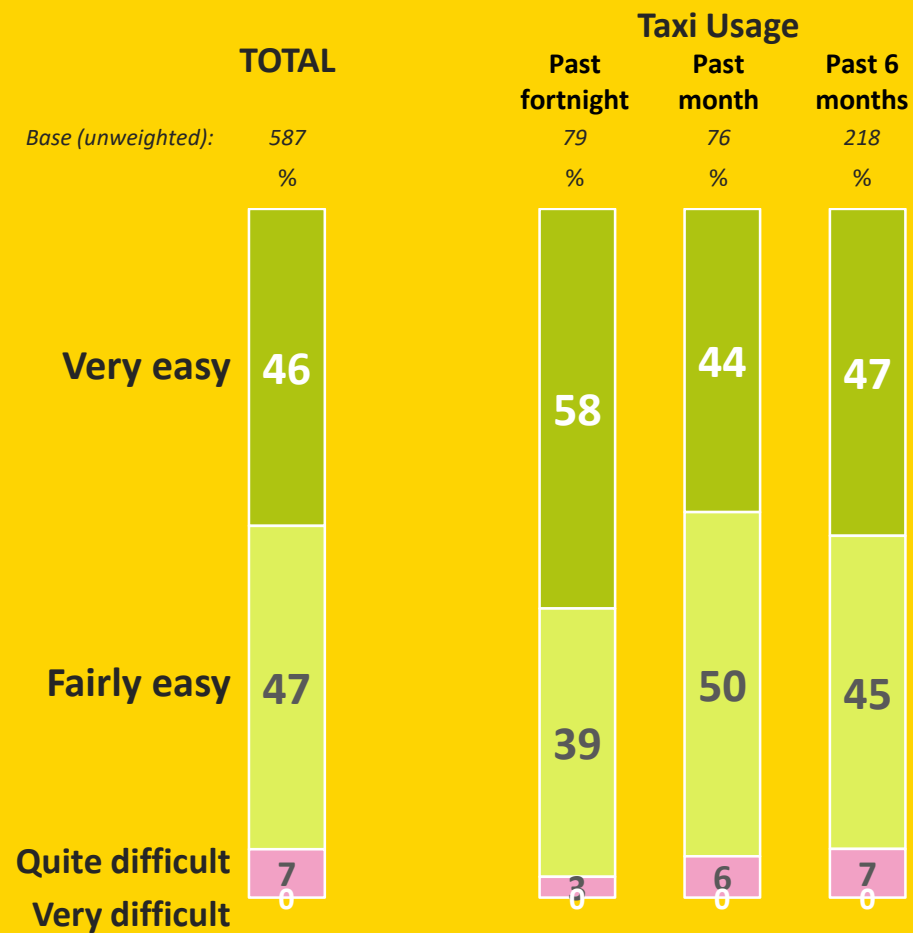
	Trip by day of week	<i>Est no. of journeys</i>
	%	540k
Monday	14%	76K
Tuesday	14%	76k
Wednesday	14%	76K
Thursday	15%	81K
Friday	25%	135k
Saturday	12%	64K
Sunday	7%	38K

Time of day taxi used over past fortnight

	Total trips by time of day	<i>Est no. of journeys</i>
	%	540k
06:00 – 07:59	6%	32k
08:00 – 09:59	13%	70k
10:00 – 11:59	5%	27k
12:00 – 13:59	14%	76k
14:00 – 15:59	20%	108k
16:00 – 17:59	13%	70k
18:00 – 19:59	12%	64k
20:00 – 21:59	7%	38k
22:00 – 23:59	6%	32k
00:00 – 03:59	4%	22k
04:00 – 05:59	1%	5k

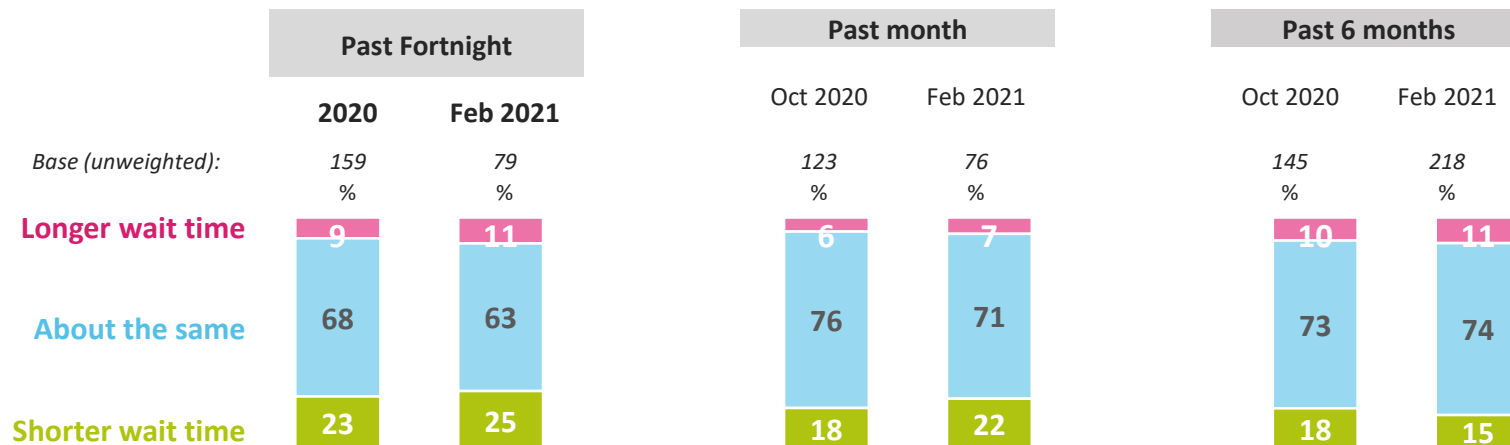
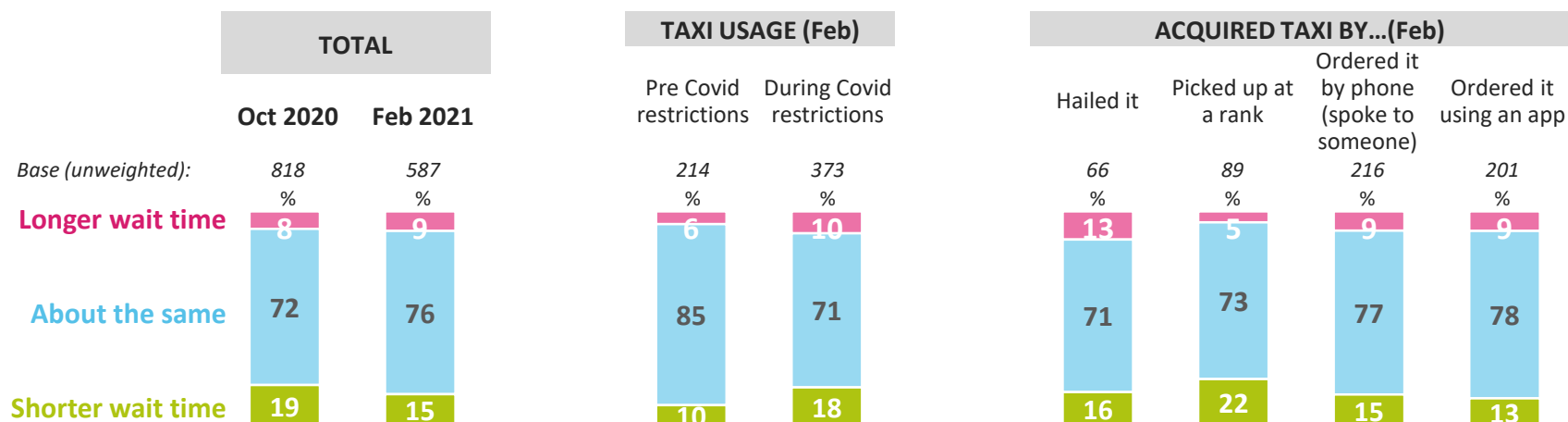
93%

found it easy to get a taxi on
last occasion (and it is
getting easier)



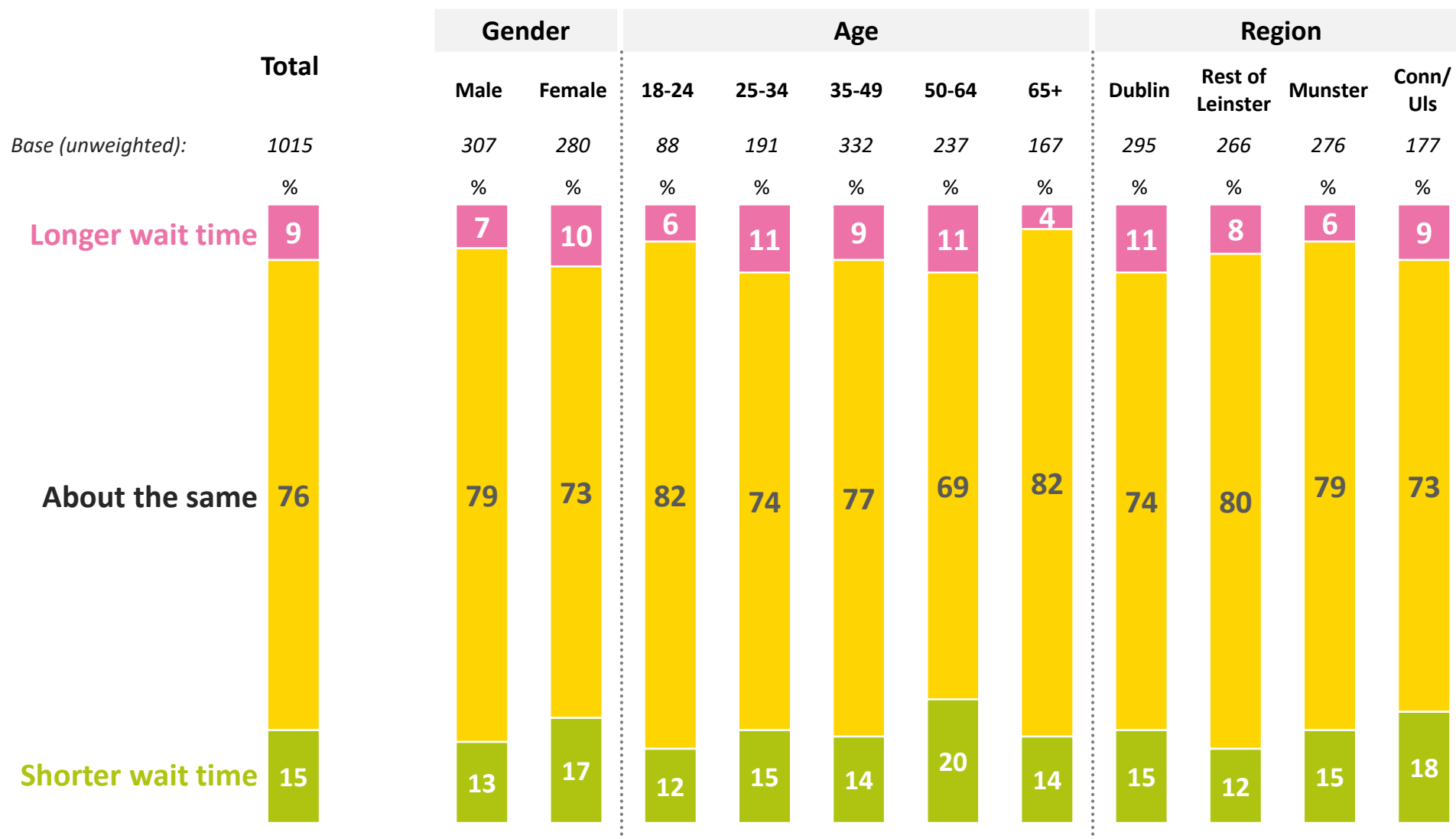
Ease of getting a taxi: On balance, it is a little easier to get taxi during Covid

Wait time compared with pre Covid

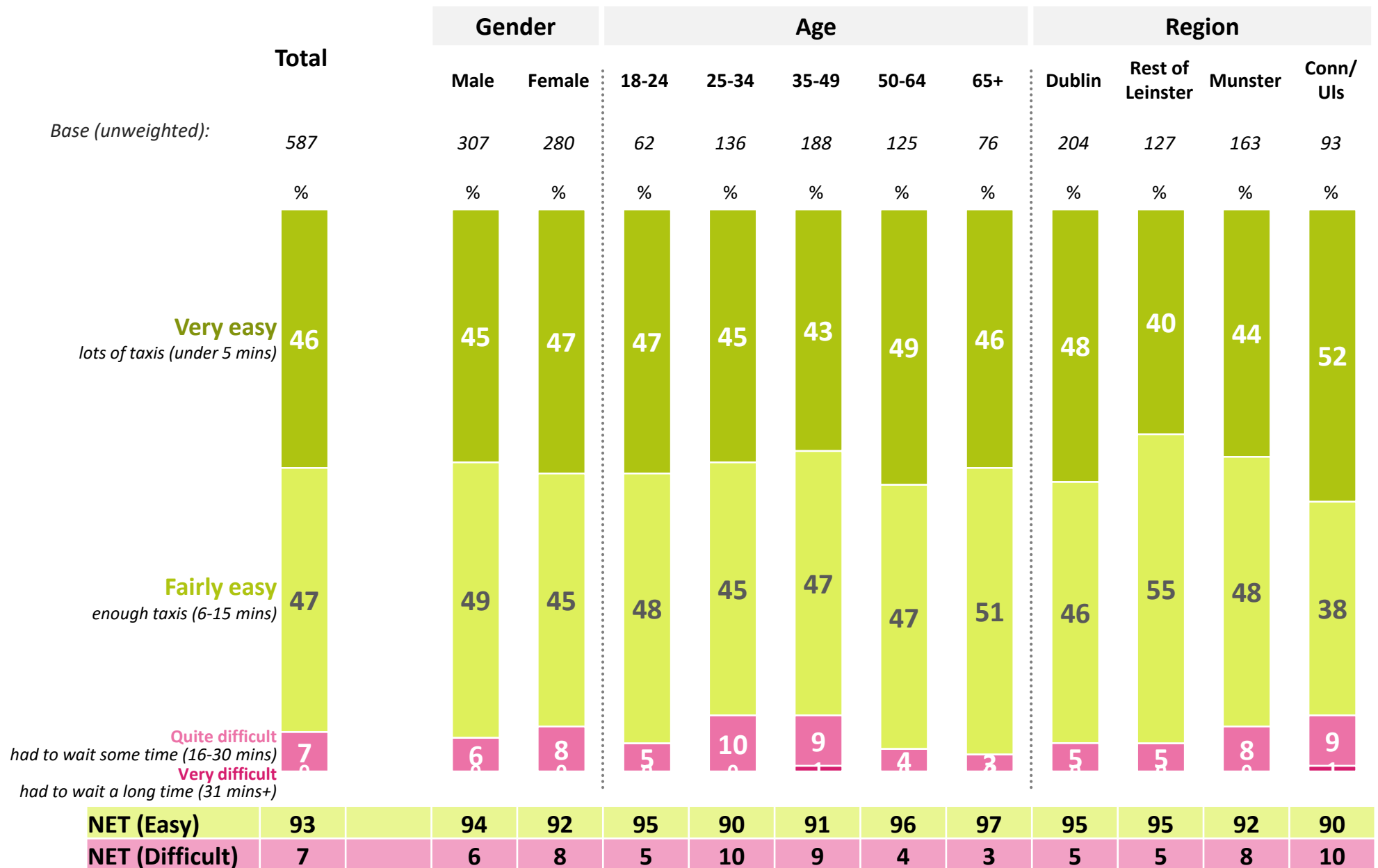


Ease of getting a taxi: On balance, it is a little easier to get taxi during Covid

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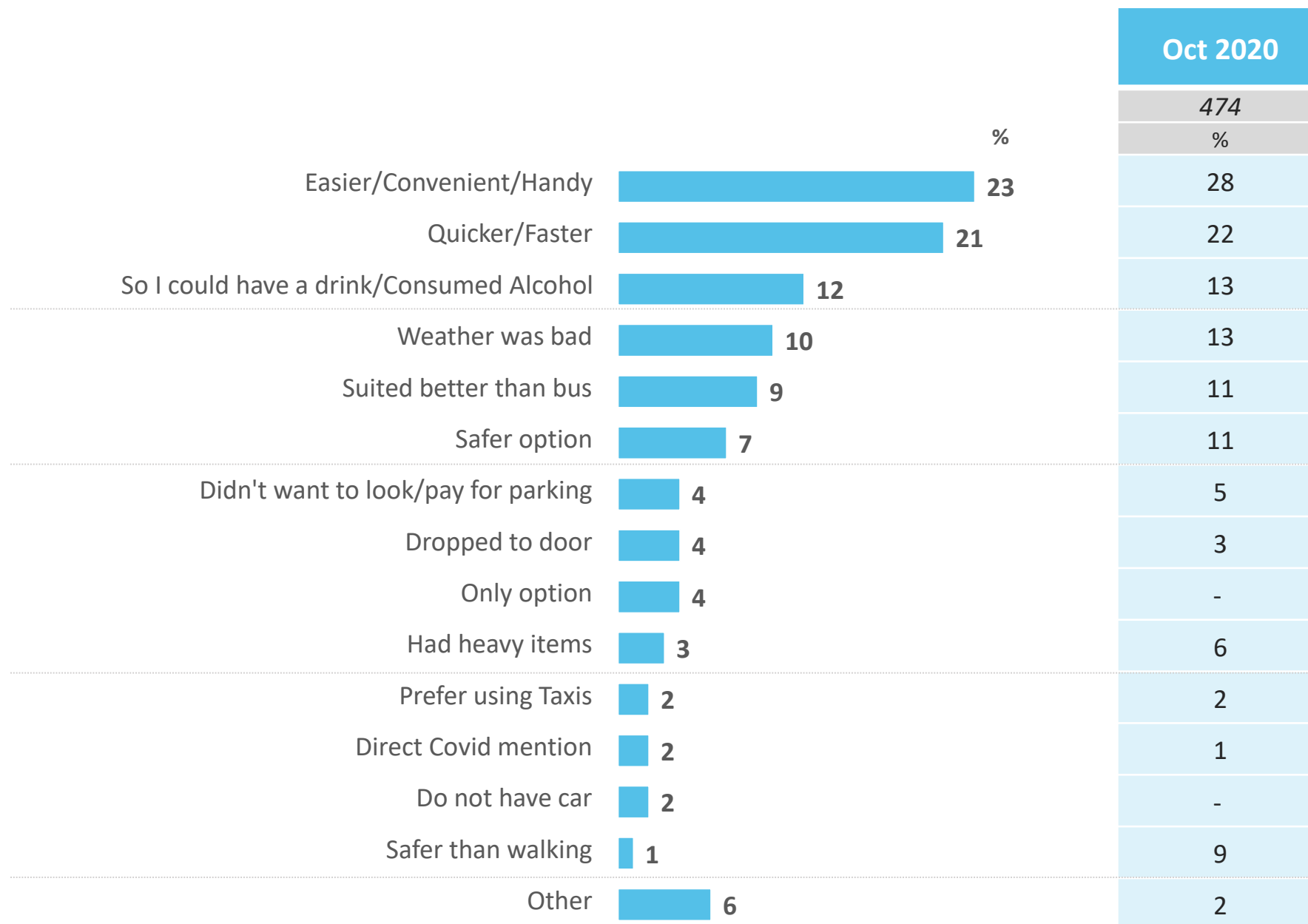
Not a huge difference across demographics



Main purpose of journey: Work, shopping and essential medical appointments dominate taxi usage currently.

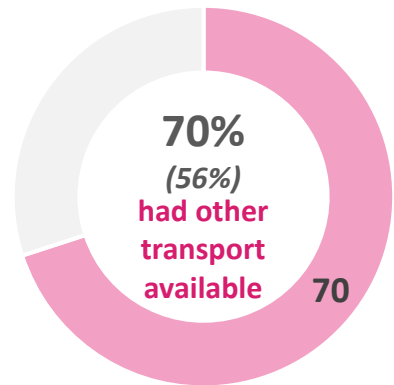
Purpose of Journey	Total	Taxi Usage			
		Past Fortnight	Past month	Past 6 months	Pre COVID-19, although during 2020
	587	79	76	218	214
	%	%	%	%	%
For leisure purposes (restaurant, pub, art/culture event I attended, other paid for leisure activities)	34	2	6	39	49
Visiting friends/family in their homes	18	17	25	21	11
Essential hospital visit or medical appointment (GP, Physio, Dentist, Optician etc.)	12	17	19	11	10
Work	11	25	19	8	6
Shopping/Shops	10	29	11	6	8
Business meeting/work meeting off site/interview etc.	5	4	4	5	5
School/college	2	-	5	1	2
Appointment (other such as hair-dresser, barber, beautician etc.)	2	1	1	2	1
Other	7	5	9	7	7

Reason for using a taxi: The two main reasons for selecting a taxi are convenience and speed (similar to October).



Other forms of transport available: **Very large majority had other transport available and more than in previous measurement in October.**

Availability of other transport

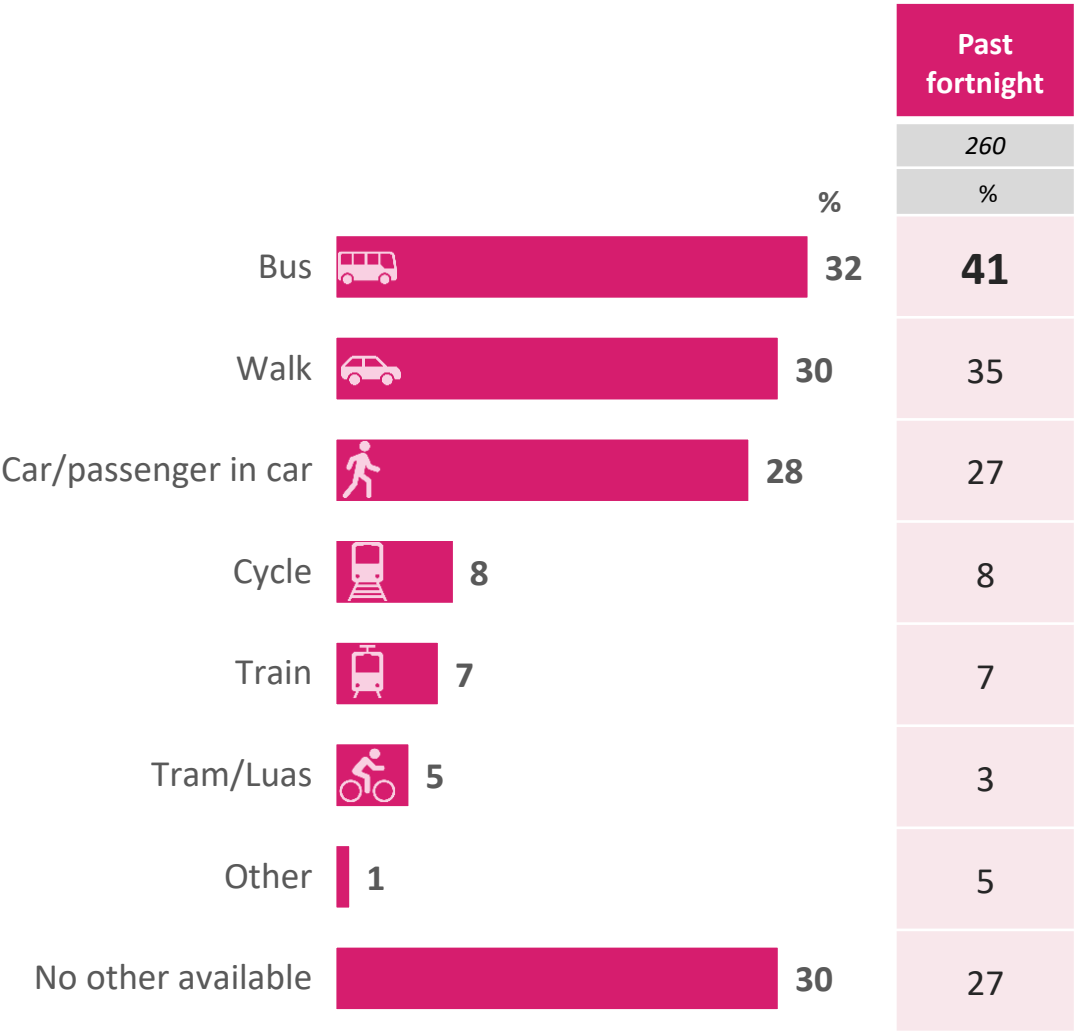


Time of day	
	%
Up to midday	84
Midday to 6pm	79
6pm to Midnight	77
After midnight	72

Region	
	%
Dublin	71
Rest of Leinster	71
Munster	74
Conn/Ulster	61



Other forms of transport available



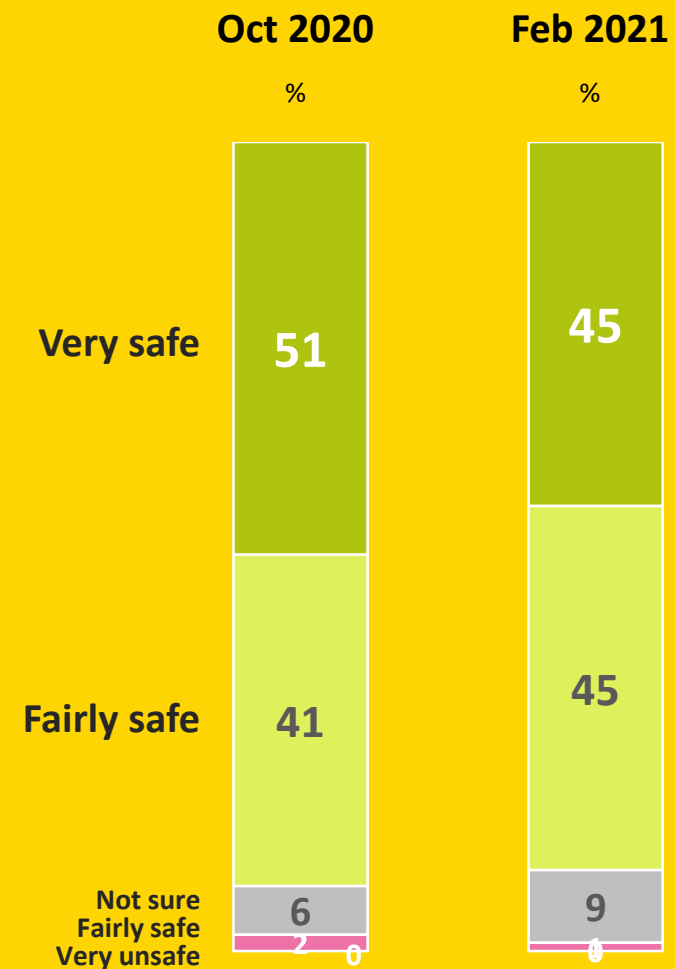
Reason for using a taxi: The two main reasons for selecting a taxi are still convenience and speed. However, more recently speed, needs suitability compared with other PT options and because of carrying heavy load.

	Oct 2020	Feb 2021	Taxi Usage			
			Past fortnight	Past month	Past 6 months	Pre Covid but during 2020
<i>Base (unweighted):</i>	474	438	64	56	173	145
	%	%	%	%	%	%
Easier/Convenient/Handy	28	23	19	27	21	26
Quicker/Faster	22	21	27	16	19	24
So I could have a drink/Consumed Alcohol	13	12	2	3	16	14
Weather was bad	13	10	8	8	12	9
Suited better than Bus	11	9	13	12	7	9
Safer option	11	7	8	7	8	6
Didn't want to look/pay for parking	5	4	4	5	5	3
Dropped to door	3	4	7	-	5	3
Only option	-	4	6	6	3	5
Had heavy items	6	3	10	2	2	2
Direct covid mention	2	2	-	3	2	1
Prefer using Taxis	2	2	-	6	1	4
Do not have car	-	2	3	3	1	3
Safer than walking	9	1	-	-	2	1
Other reason	2	6	10	10	6	3

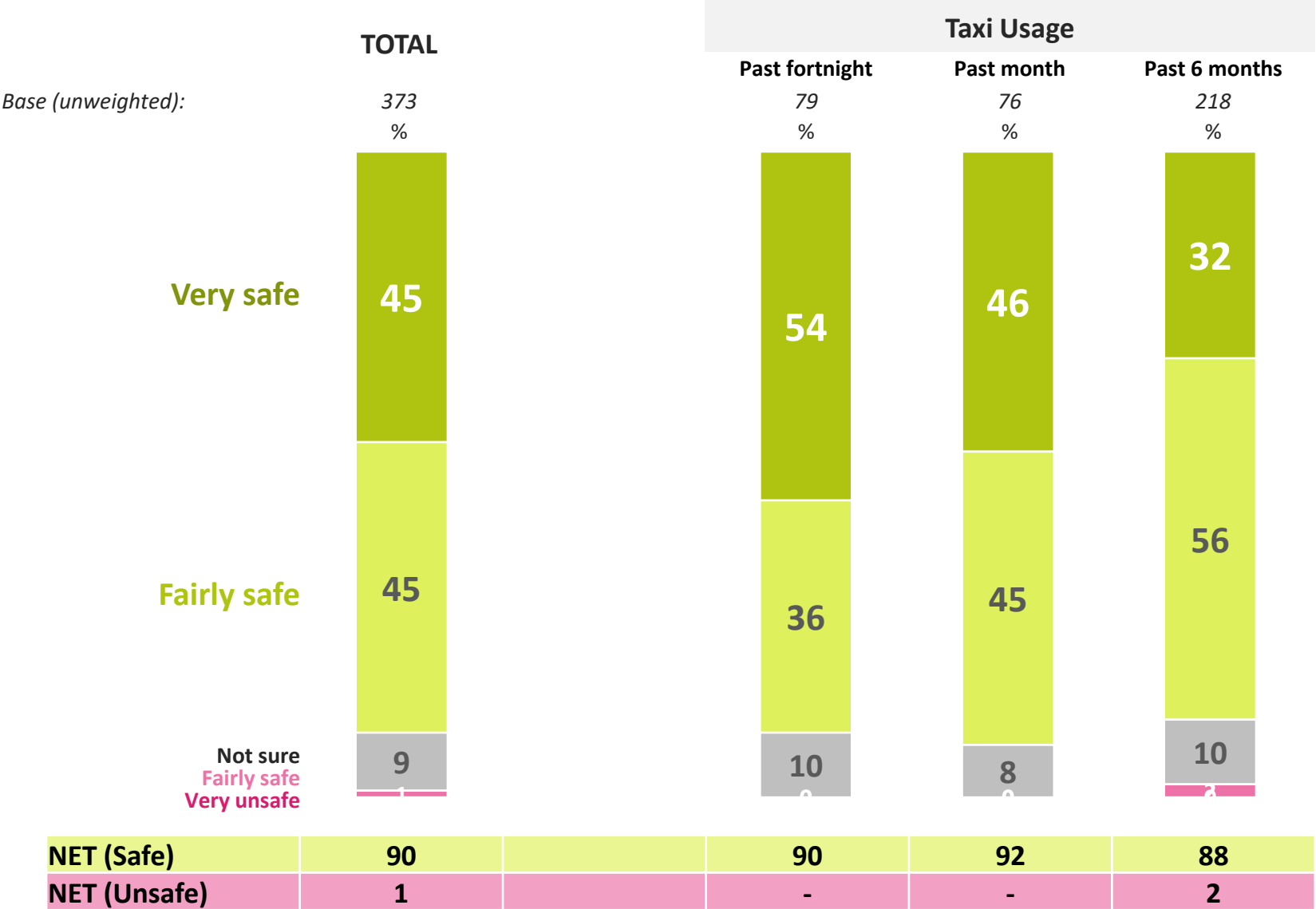


3. Covid safety measures

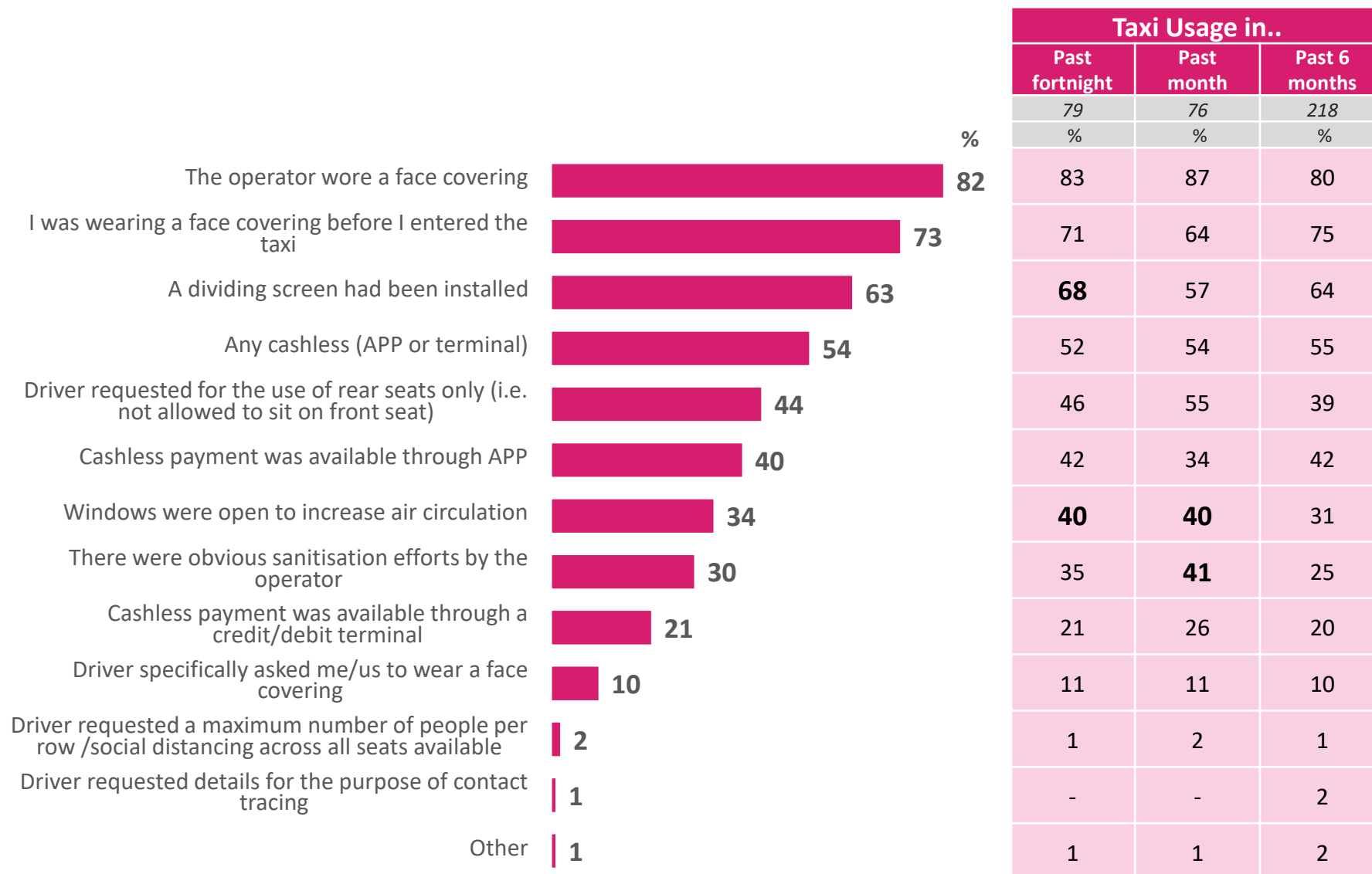
In the context of Covid,
90% (92%)
felt safe on their last
taxi journey



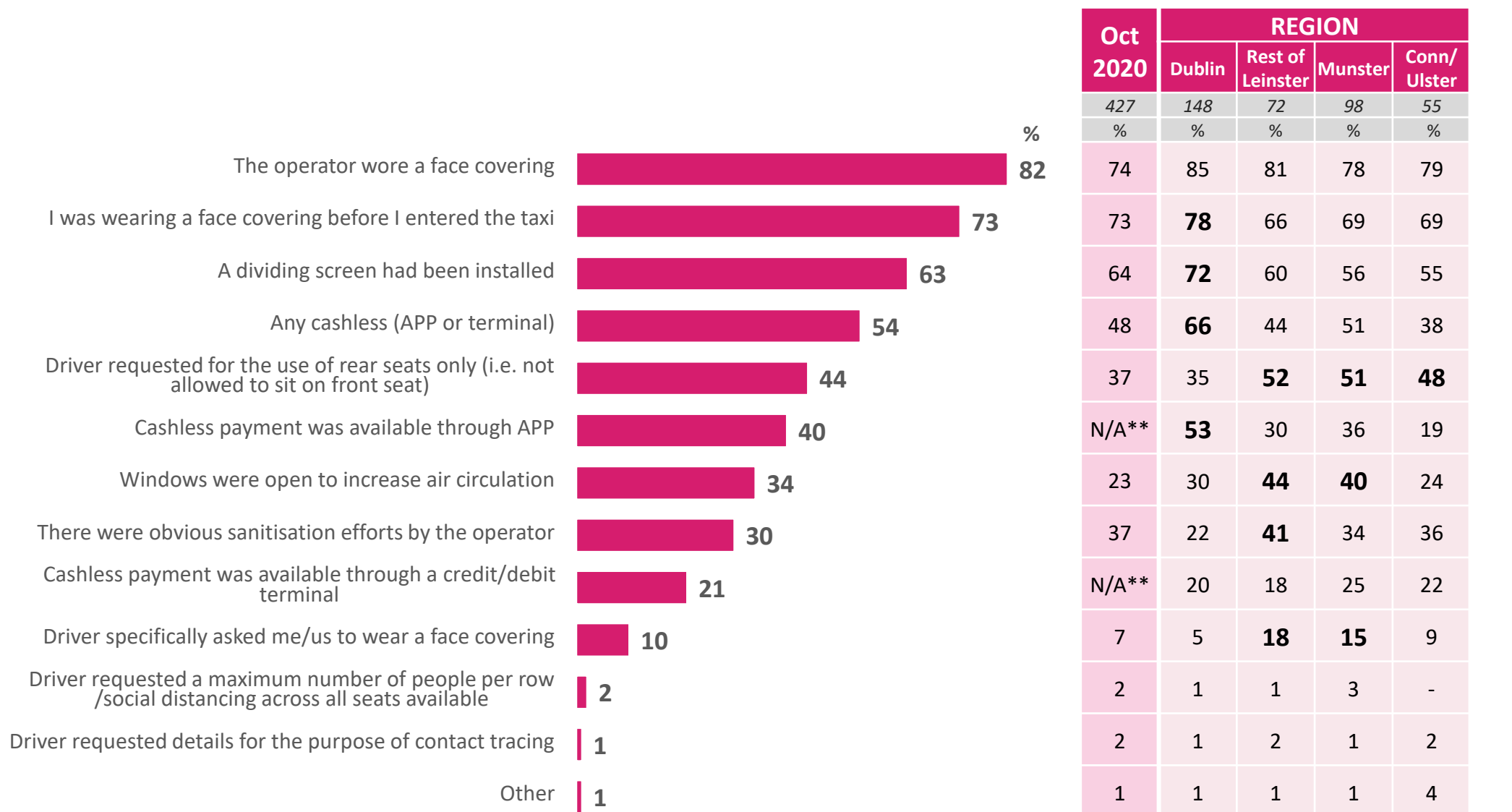
9 in 10 felt safe from Covid on their journey.



Covid related measures: There are a lot of measures in place with some evidence to suggest dividing screens and air circulation increasing more recently.

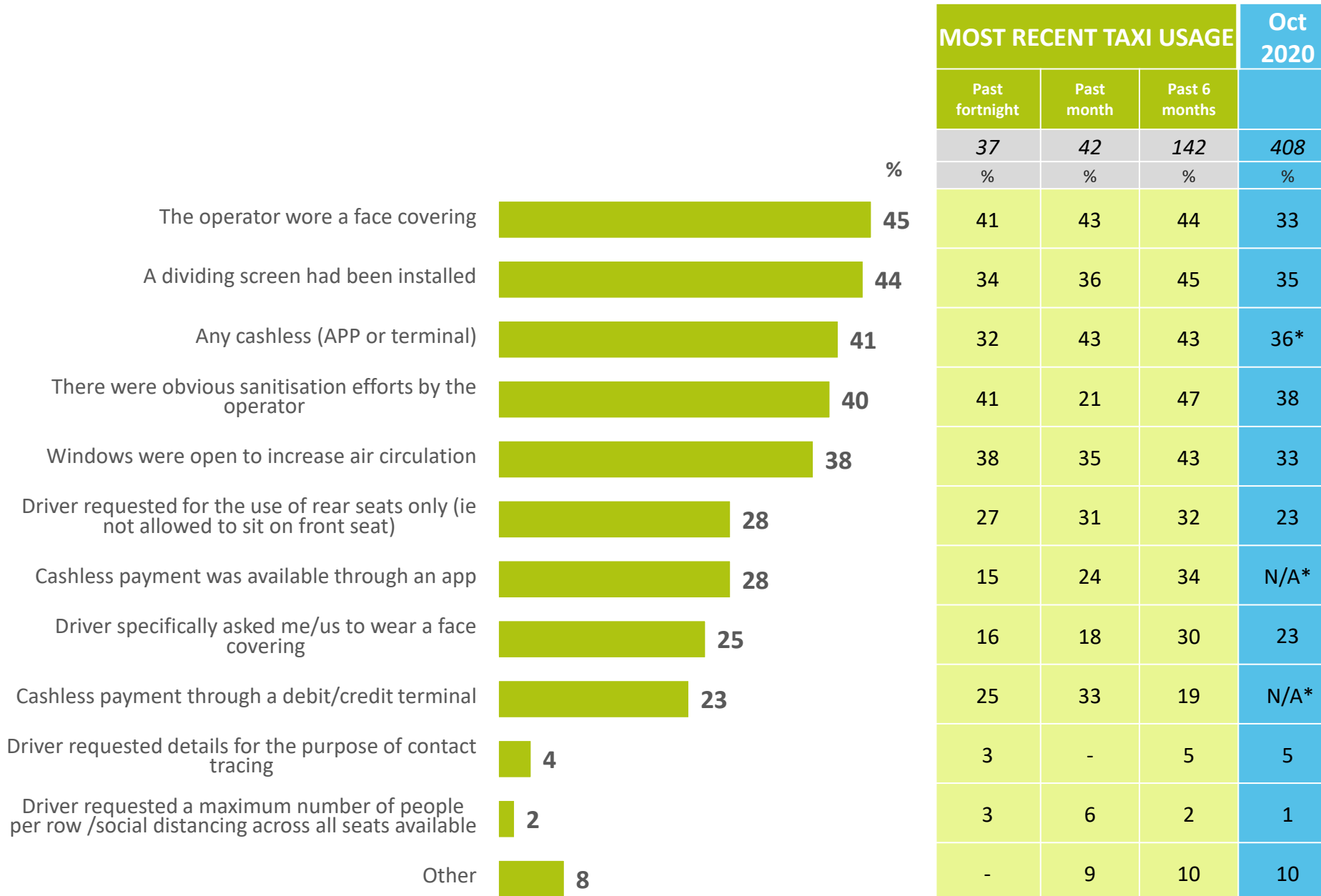


Covid related measures: Face coverings and dividing screens dominate the Covid safety measures.



**One single answer option of cashless payment was available in Phase 1. This was extended to two for Phase 2. Data has also been combined to provide a figure for Any cashless

Aspects that would make passengers feel safe from Covid



**One single option of cashless payment was available. Now two options

Some difference in perception by demographics.

	Total	Gender		Age					Region			
		Male	Female	18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Conn/ Uls
<i>Base (unweighted):</i>	320	171	149	38	87	99	59	37	124	56	89	51
	%	%	%	%	%	%	%	%	%	%	%	%
The operator wore a face covering	45	42	50	48	37	43	44	65	49	41	49	36
A dividing screen had been installed	44	43	46	46	36	46	43	55	51	38	43	34
Any cashless (APP or terminal)	41	41	40	64	43	28	33	42	46	42	31	41
There were obvious sanitisation efforts by the operator	40	39	41	52	42	33	29	48	49	29	34	33
Windows were open to increase air circulation	38	35	41	58	40	27	28	44	47	31	33	27
Driver requested for the use of rear seats only (ie not allowed to sit on front seat)	28	26	29	47	25	22	21	31	34	22	23	24
Cashless payment was available through an app	28	30	25	52	32	18	20	18	33	25	19	30
Driver specifically asked me/us to wear a face covering	25	25	26	42	18	21	17	41	34	24	18	16
Cashless payment through a debit/credit terminal	23	20	27	22	25	19	21	32	24	25	22	19
Driver requested details for the purpose of contact tracing	4	4	4	-	3	6	5	2	5	4	3	1
Driver requested a maximum number of people per row /social distancing across all seats available	2	3	2	-	1	5	-	6	2	2	4	2
Other	8	10	6	6	8	13	7	4	10	9	5	10

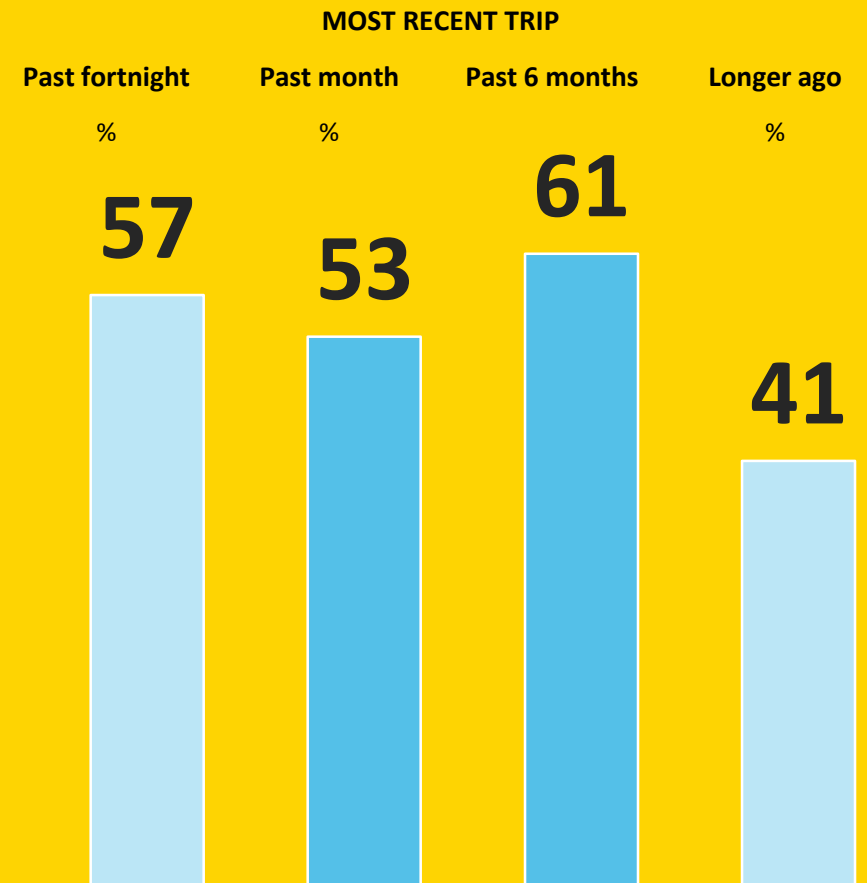


4. How payments are being made



On average use of contactless higher during Covid

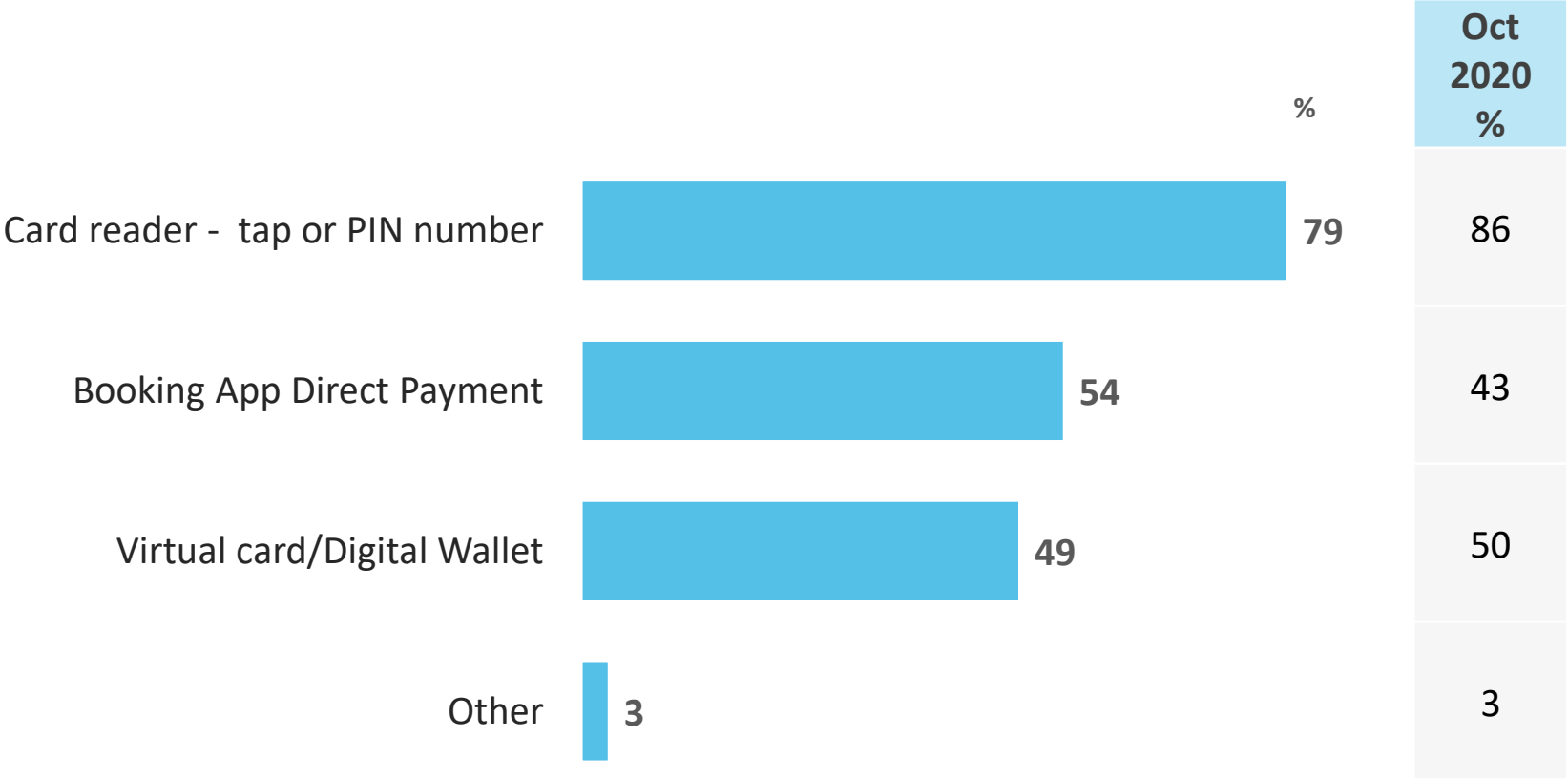
57%
of passengers used
contactless recently
to pay for their taxi



Preferred payment method is heavily led by contactless.

	Total	Region				Taxi Usage				Aquired Taxi by			
		Dublin	RoL	Mun	Conn/ ULs	NET (Past Fort- night)	Past month	Past 6 months	Pre COVID- 19, although during 2020	Hailed it	Picked up at a rank	Ordered it by phone (spoke to someone)	Ordered it using an app
Base (unweighted):	587	204	127	163	93	79	76	218	214	66	89	216	201
	%	%	%	%	%	%	%	%	%	%	%	%	%
Any contactless:	69	80	63	60	60	70	65	77	61	56	59	55	92
The app that I used to order the taxi	32	45	25	27	16	38	25	40	23	17	8	8	74
Tapped a card (no contact)	30	28	29	26	41	21	30	30	34	35	45	39	14
Tapped mobile to pay through Googlepay, Applepay etc	5	5	5	5	3	2	8	6	4	4	6	6	3
Company Account	2	2	4	2	-	9	2	1	0	-	-	2	1
Any contact:	32	19	36	39	40	29	35	23	39	43	41	45	8
By cash	29	17	34	34	38	28	28	21	36	43	40	41	6
Used chip and pin to pay by card	3	2	2	4	2	1	6	2	2	-	1	3	2
Other	0	-	-	1	-	-	1	-	1	-	-	1	-

Payment methods that should be available in addition to cash:
There is widespread interest in having access to card payments in all taxis.



Payment methods that should be available in addition to cash:
Terminals are most popular in terms of what consumers think should be available in addition to cash.

	Total	Age					Region			
		18-24	25-34	35-49	50-64	65+	Dublin	RoL	Mun-ster	Conn/Uls
<i>Base (unweighted):</i>	1015	88	191	332	237	167	295	266	276	177
	%	%	%	%	%	%	%	%	%	%
Payment by card through the use of a terminal available in taxi	79	59	82	78	84	84	73	81	83	80
Payment through a payment app	54	68	66	55	52	37	66	52	48	48
Payment by a virtual card/wallet through phone app (Googlepay, Applepay)	49	54	58	55	48	32	53	49	49	46
Other	3	-	0	4	6	3	1	5	2	5

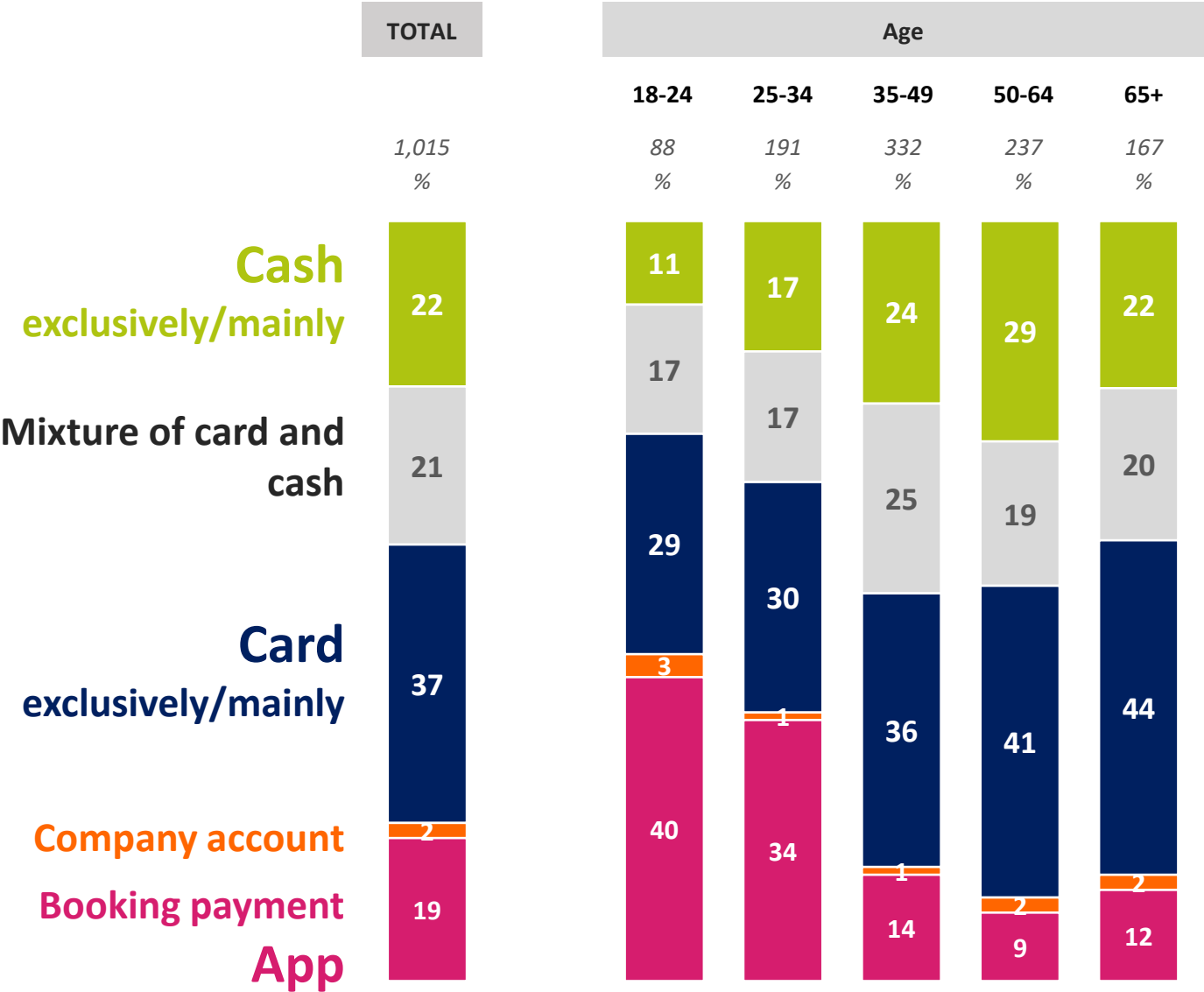
Payment methods Pre Covid: Cash used to be the main form of payment pre covid.

	October 2020	February 2021
<i>Base (unweighted):</i>	1,026	1,015
	%	%
Cash exclusively/mainly	65	69
Mixture of card and cash	24	19
Card exclusively/mainly	10	5
Company account	-	3
Booking payment app	-	16

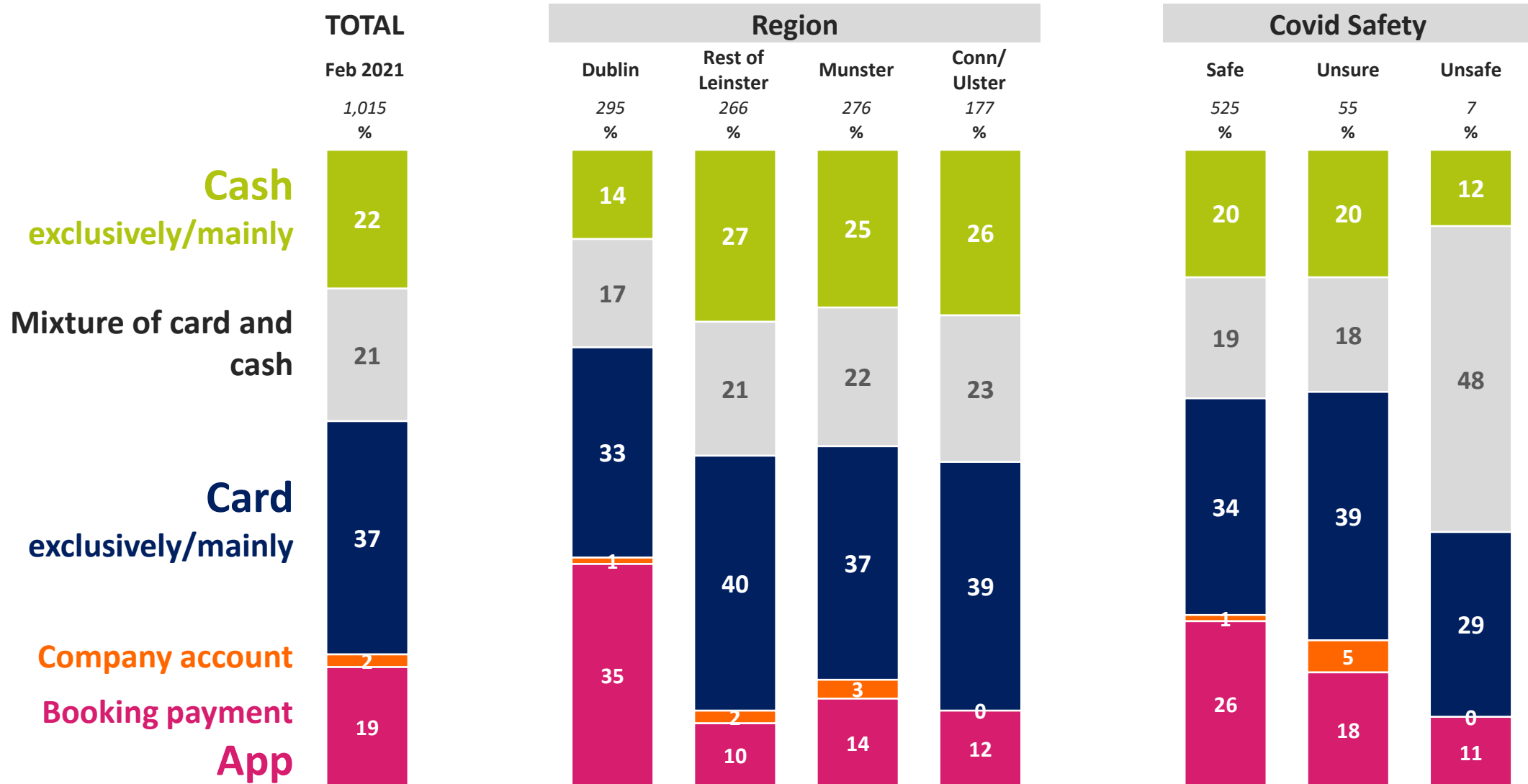
Payment methods used most often pre covid:

Payment Method	Total	Age					Region			
		18-24	25-34	35-49	50-64	65+	Dublin	RoL	Munster	Conn/ Uls
	1015	88	191	332	237	167	295	266	276	177
	%	%	%	%	%	%	%	%	%	%
Cash exclusively/mainly	65	41	43	67	77	80	49	71	68	76
Mixture of card and cash	15	11	17	19	15	12	15	17	16	12
Card exclusively/mainly	5	10	8	5	3	2	6	5	5	4
Company account	2	4	3	2	1	1	2	1	3	1
Booking payment App	13	34	29	7	4	5	27	6	8	7

Payment preferences: 57% of respondents use contactless payment when paying for their taxi journeys with 78% using some form of cashless payment.



Cash emerges with a higher preference outside of Dublin



With Covid restrictions
only 1 in 4 still prefer to
pay using
Cash



Pre Covid
restrictions

Used to pay
CASH

Oct 2020 Feb 2021

%

%

65 69



Now

Currently pay
CASH

Oct 2020 Feb 2021

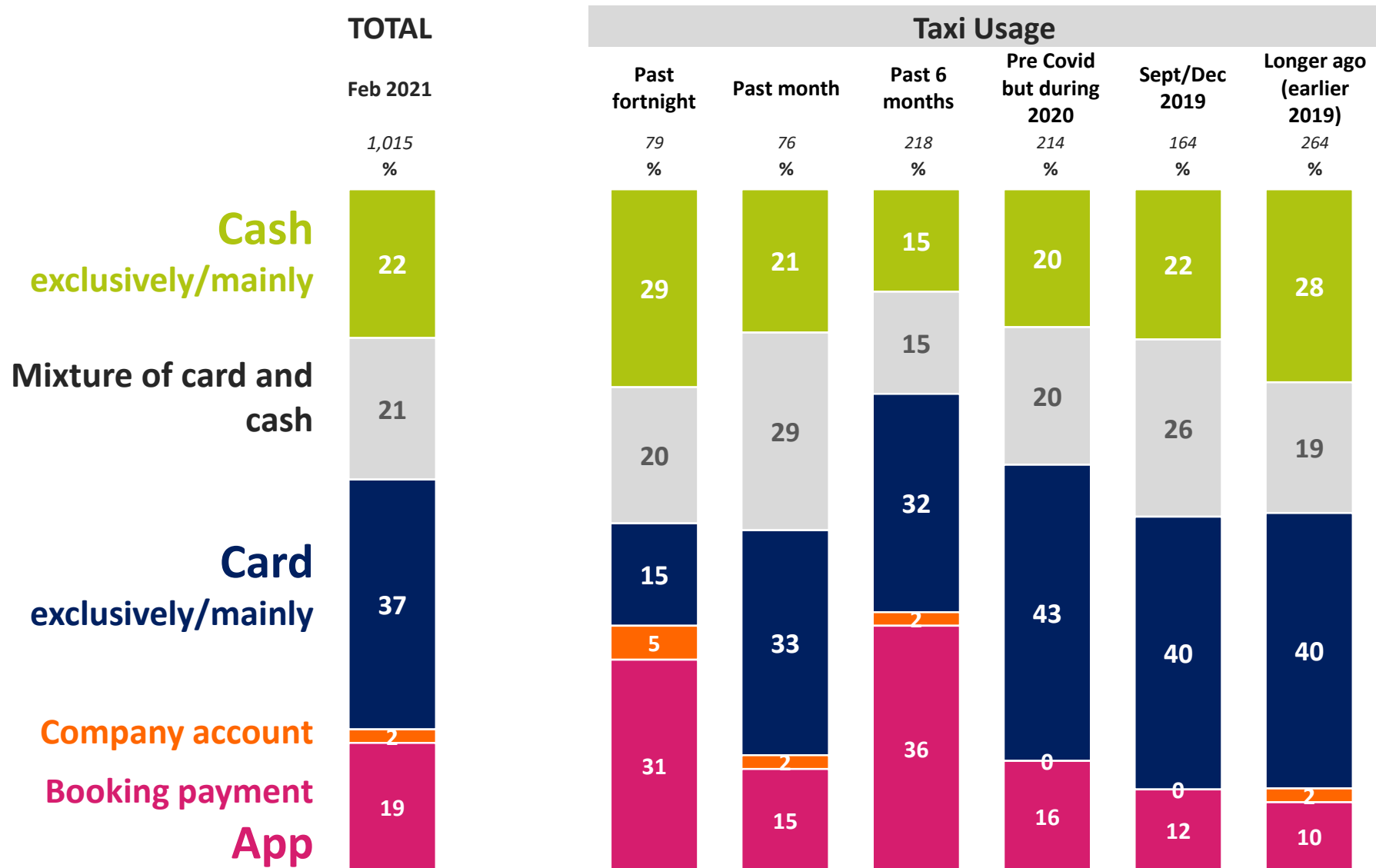
%

%

25 22



Preferences moving in favour of booking apps for recent journeys



Payment methods Pre Covid and since Covid: **More than half now using booking payment app or mainly/exclusively card**

	Pre Covid as a general rule*		Since Covid	
	October 2020	February 2021	October 2020	February 2021
<i>Base (unweighted):</i>	1,026	1,015	1,026	1,015
	%	%	%	%
Cash exclusively/mainly	65	69	25	22
Mixture of card and cash	24	19	24	21
Card exclusively/mainly	10	5	51	37
Booking payment app	n/a	16	n/a	19
Company account	n/a	3	n/a	2

*multiple answers allowed



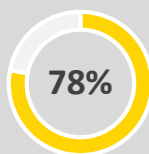
5. Key findings

Key Findings February 2021

Taxi usage



- Only **3%** of adults use taxi services WEEKLY, which is similar to train and Luas/Dart. Bus is higher @ 12% but all are lower than October reported usage norms.



of taxi users are using services less frequently than pre-Covid (up from 66% in Oct).

- Estimates of size of the user base have declined from 300K in past week to 120K.
- Compared with pre Covid, the indicators suggest a decline of 73% in terms of number of journeys.

Covid Safety Measures



- Importantly, **90%** of taxi users during Covid **felt safe** from Covid.
- Taxi customers have witnessed a lot of safety measures in place including driver wearing face coverings (82%) and a dividing screen between the driver and passenger (63%). Using a cashless system to pay also evident: 57% of passengers used contactless recently to pay for their taxi.
- Cashless options and screen dividers more evident in Dublin (53% and 72% respectively).

Looking ahead



- There is no evidence to indicate that taxi usage will increase by any significant degree over next month but there are more positive signs of an increase in 2-3 months time
- Projected usage even in 2-3 months time is lower than predicted in October and when compared with other forms of PT. As such, 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, vehicle sanitation) for the industry must be important to continue to build trust. The main purpose of taxi usage currently is for **shopping, work and medical appointments**. When leisure returns the mix, no doubt demand will grow.

Key usage changes

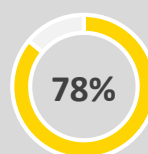


- Among current taxi users, there has been a definite **shift towards ordering the taxi by phone or through an app**.
- Journeys now seems **shorter** even compared with October estimates.
- Day of week usage is slightly more broadly based across the week with Friday the most popular.
- **Most usage is before 6pm**
- The **role for taxi usage** now driven by three main purposes – **shopping, work and medical appointments**.

Payment options



- **57%** of those using taxi services in past fortnight used contactless for payment.
- Contactless higher in Dublin and those ordering from Booking App.
- Cash equally as important outside Dublin and particularly for those hailing, rank usage and even telephone ordering.
- Contactless users more male and younger.



of taxi users now believe that all taxis should have some form of cashless payment option available.

Building trust



- For those who are not feeling as COVID safe with taxi usage, the priorities in order are :-
 - Driver wears a face covering
 - Dividing screens
 - Obvious signs of sanitation of the vehicle
 - Windows open (if possible)

Explanatory Note

In some instances throughout this report, the figures in any one chart may not add to 100%. While in some cases this may be down to the fact that the respondent was given multiple answer options and allowed to select more than one.

In others, where the figures are one or two percentage points off 100%, the reason is likely to be a rounding error. This is a standard occurrence in market research statistics and does not negate the accuracy of our findings.

