Covid Impact Research Wave 3 - Taxi Users

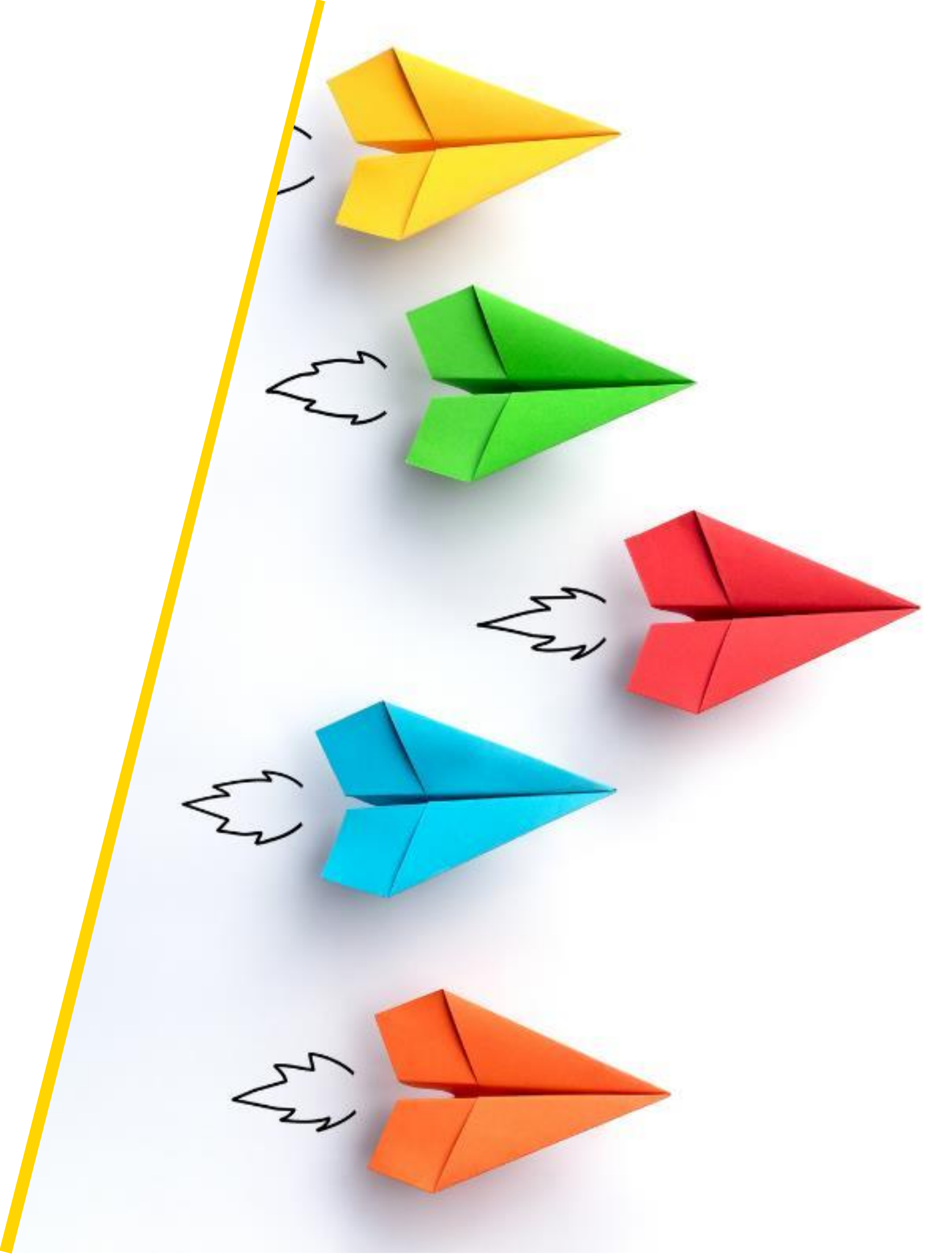
National survey
May/June 2021

Data gathered during period of easing of Government restrictions

Introduction

Introduction

- This report details the findings of a representative survey of taxi users in Ireland (May/June 2021). The survey is the third survey in the series.
- It sets out to understand current and expected usage with a focus on understanding the impact of the pandemic. The information is to help plan 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-19 has had on taxi drivers.



Objectives

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

What ongoing impact has Covid-19 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

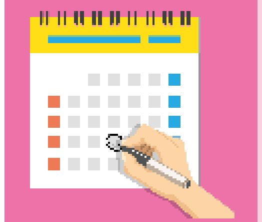
A representative survey of taxi users in Ireland.

Sample Size:

1,015 adults
658 Taxi users
567 Past year taxi users

Quota Controls:
Quota controls in place for gender, age, social class, 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:

27th May to 14th June, 2021.

B&A Acumen Panel

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

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Research Timeline

March 2020

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

Apr/May 2020

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.

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

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

Oct-Nov 2020

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 & 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

High case numbers leads 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.

Apr-May 2021

All children back to school and some restrictions eased. Outdoor meet ups permitted in small groups, but hospitality remained closed and working from home encouraged. Non-essential retail back as well as professional services (e.g. hairdressers, etc.)

June 2021

Outdoor dining re-opened. Test events being rolled out and vaccine programme opened up to under 50s.

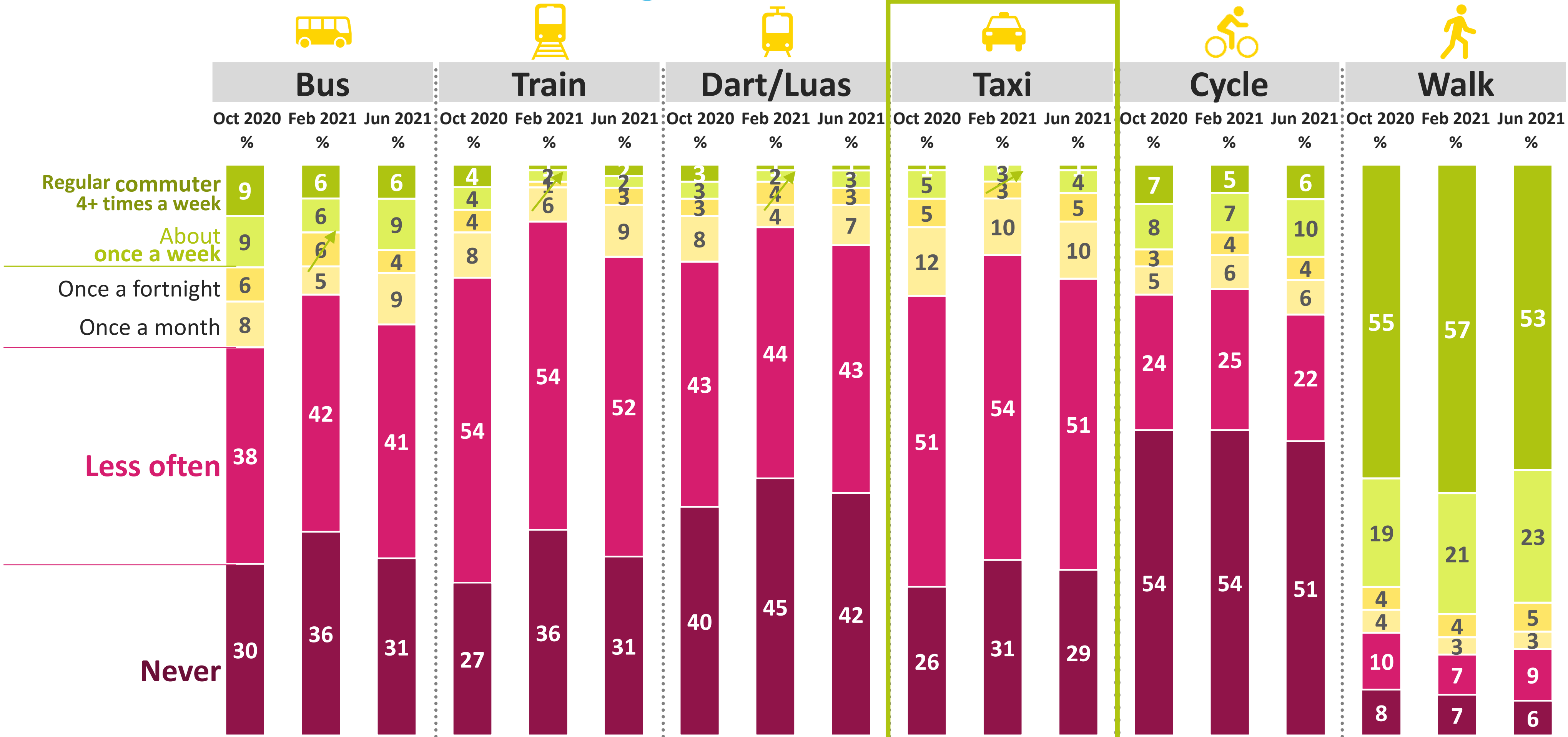
1. Taxi usage in context of public transport usage in general

There is evidence of a modest increase in the number of taxi users and this does impact positively on journey estimates.

71% ***(69%)*** **of adults currently use taxi with 5%** ***(3%) who now*** **use weekly and 15%** ***(12%)*** **using fortnight/monthly**

( ) = Feb 2021

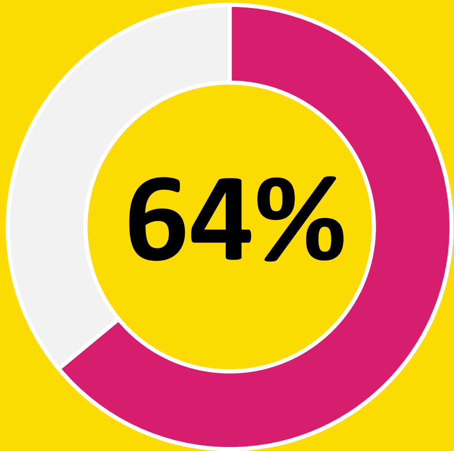
The absolute number of public transport users has only really increased on the periphery compared with February. Walking continues to be the main form of commuter transport, although it may be a little less regular now. There is a modest increase in regular taxi user numbers.



	Bus Oct 2020	Bus Feb 2021	Bus Jun 2021	Train Oct 2020	Train Feb 2021	Train Jun 2021	Dart/Luas Oct 2020	Dart/Luas Feb 2021	Dart/Luas Jun 2021	Taxi Oct 2020	Taxi Feb 2021	Taxi Jun 2021	Cycle Oct 2020	Cycle Feb 2021	Cycle Jun 2021	Walk Oct 2020	Walk Feb 2021	Walk Jun 2021
Weekly+	18	12	15	8	3	4	6	3	4	6	3	5	15	12	16	74	78	76
Fortnightly/ Monthly	14	11	13	12	7	12	11	8	10	17	12	15	8	9	10	8	7	8
Any Usage	70	64	69	73	64	69	60	55	58	74	69	71	46	46	49	92	93	94

Base: All adults 1,047

May/June 2021



Indicate they are **using taxis less** now **than** they were **pre Covid**

(78%) *= Feb 2021*

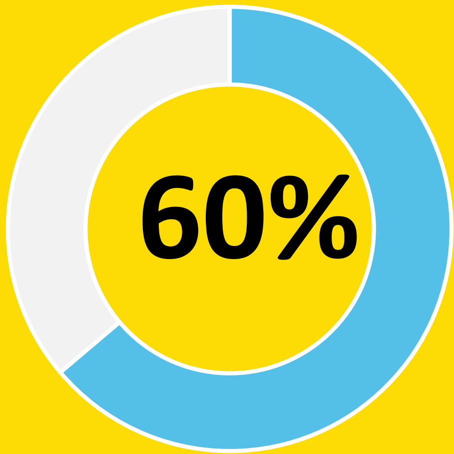
So, while the increase in the number of taxi users is modest, we are seeing a stronger

perceptual shift

in consumer taxi usage behaviour. Considerably fewer reporting less usage compared with Feb.

The main reason for reduced usage is the reduced level of socialising

Going out less

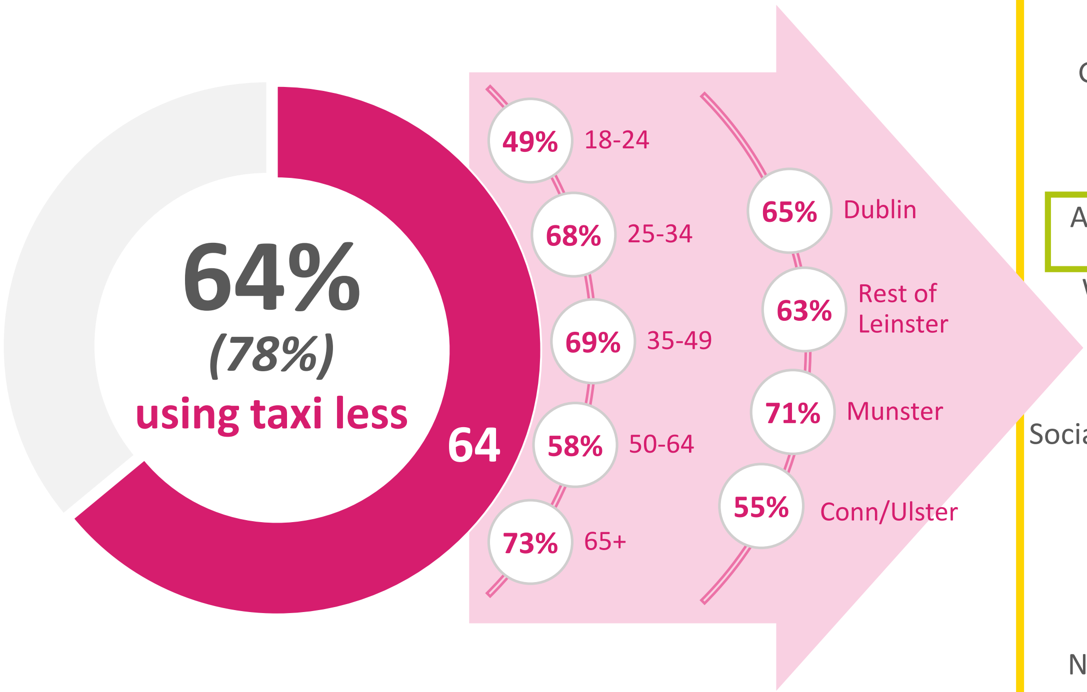


Encouragingly, this is a little lower than in February.

(66%) *= Feb 2021*

Importantly we are seeing fewer saying they are reducing usage because of a conscious effort to minimise risk of contracting COVID, with the main reason remaining that potential taxi users are going out less often

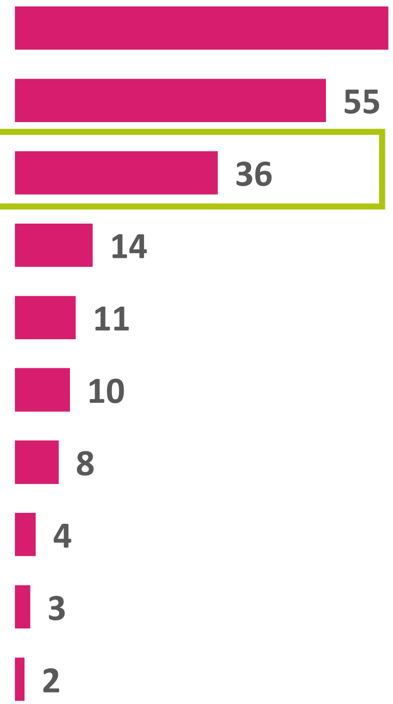
Base: All taxi users past year 567



Now two thirds reporting taxi usage lower than pre Covid, compared with 78% in February 2021 - so that is a positive shift.

Using less

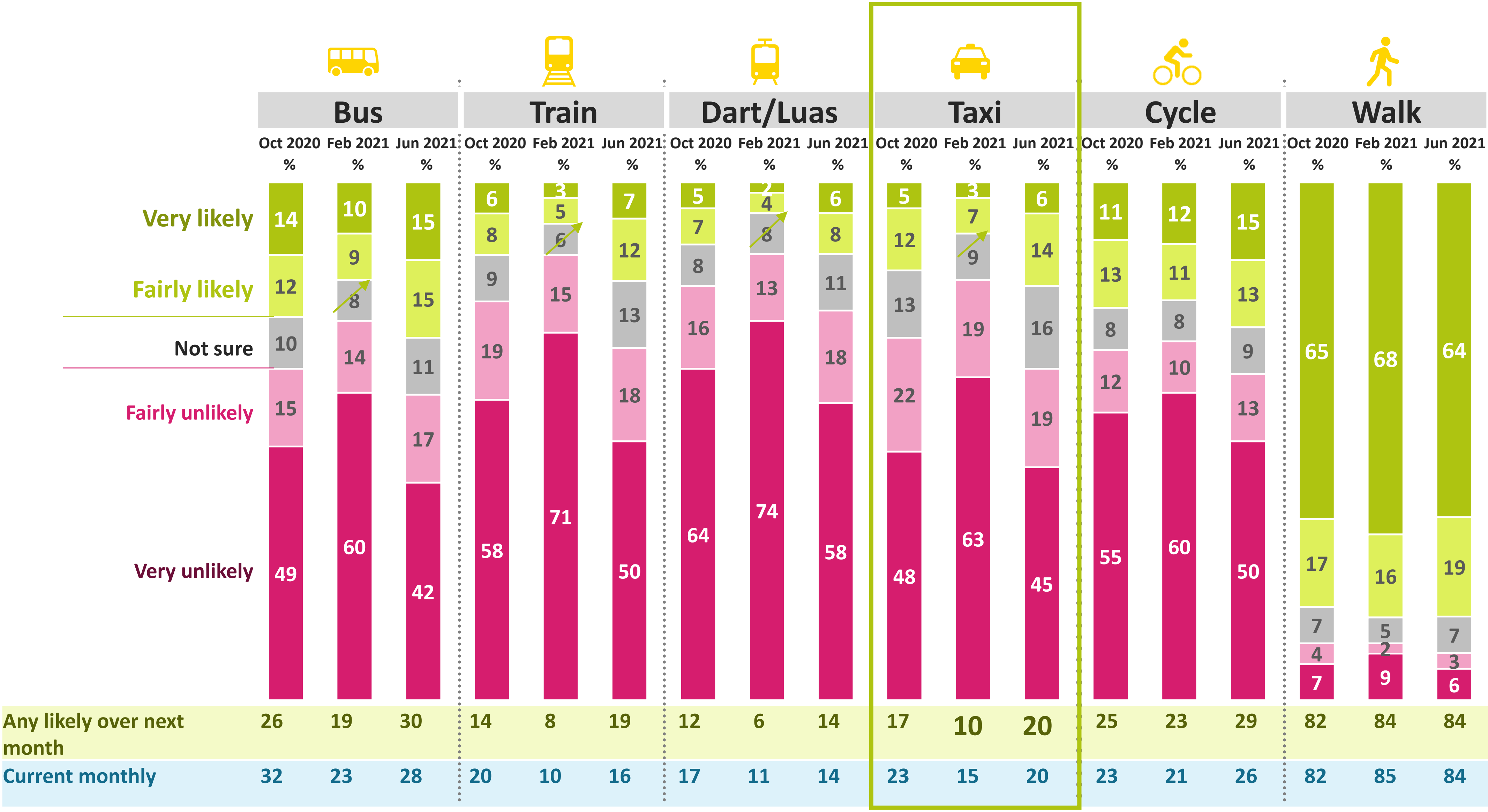
Base: 373 Past Year Taxi Users using taxis less often



	%	Feb 2021 %
Going out socialising less so less of a need	66	66
Travelling less generally	55	52
A conscious effort to minimise risk of contracting COVID	36	**43**
Working from home currently/more often	14	15
Less disposable income	11	9
Socialising is over earlier at the moment so able to use public transport	10	5
Now using a car more often	8	12
Have begun using a car	4	3
Now using a bike/scooter more often	3	1
I am now using a bike/scooter more often	2	-

() = Feb 2021

Over the next month, Public Transport usage projections almost all double compared with February (bus the exception). Importantly also cycling has a projected increase. However, this only represents the current status quo. Notwithstanding that, a perceptual shift is usually the step before action.

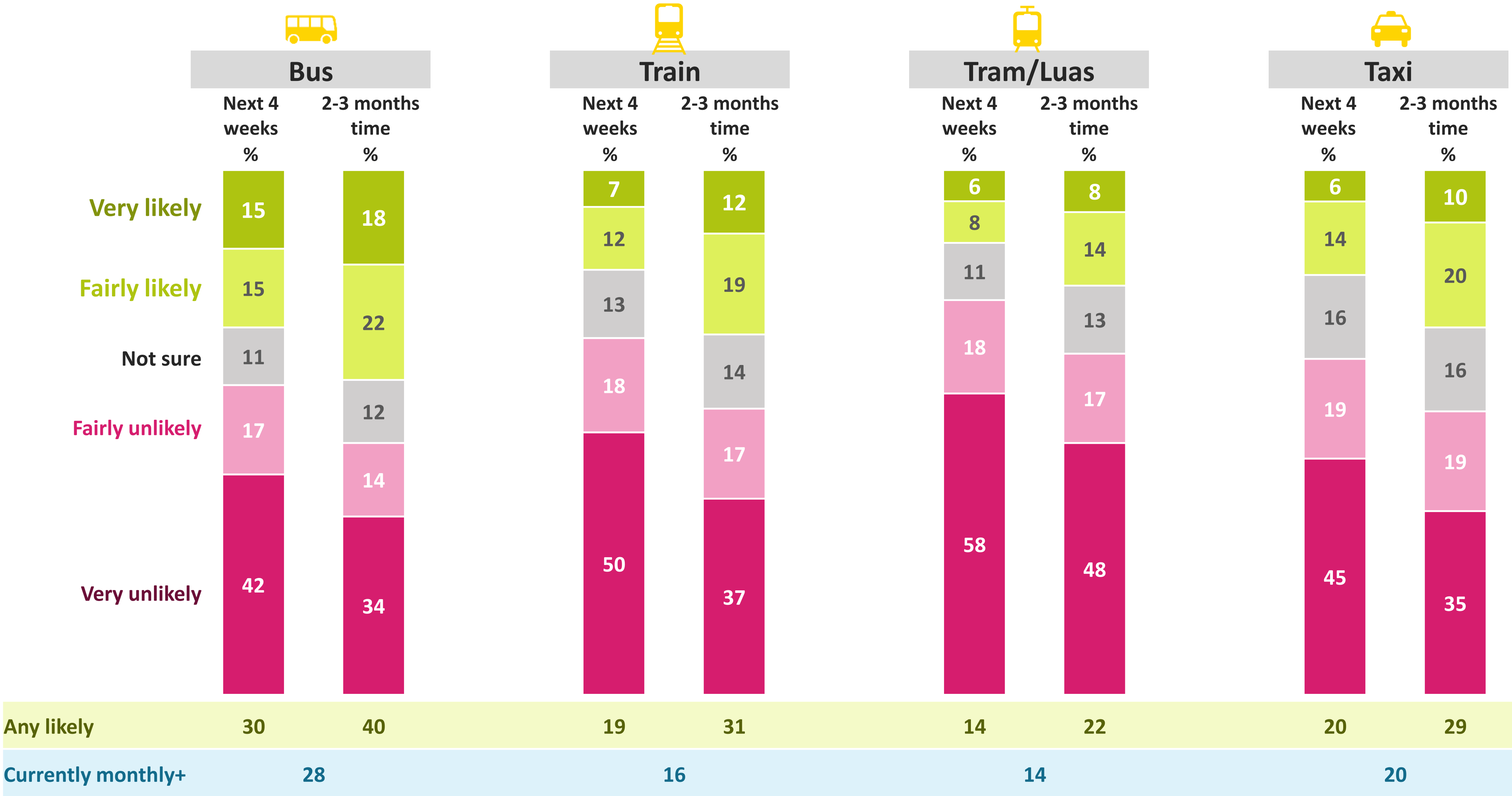


	Bus Oct 2020 %	Bus Feb 2021 %	Bus Jun 2021 %	Train Oct 2020 %	Train Feb 2021 %	Train Jun 2021 %	Dart/Luas Oct 2020 %	Dart/Luas Feb 2021 %	Dart/Luas Jun 2021 %	Taxi Oct 2020 %	Taxi Feb 2021 %	Taxi Jun 2021 %	Cycle Oct 2020 %	Cycle Feb 2021 %	Cycle Jun 2021 %	Walk Oct 2020 %	Walk Feb 2021 %	Walk Jun 2021 %
Very likely	14	10	15	6	3	7	5	2	6	5	3	6	11	12	15	65	68	64
Fairly likely	12	9	15	8	5	12	7	4	8	12	7	14	13	11	13	17	16	19
Not sure	10	8	11	9	6	13	8	8	11	13	9	16	8	8	9	7	5	7
Fairly unlikely	15	14	17	19	15	18	16	13	18	22	19	19	12	10	13	4	2	3
Very unlikely	49	60	42	58	71	50	64	74	58	48	63	45	55	60	50	7	9	6
Any likely over next month	26	19	30	14	8	19	12	6	14	17	10	20	25	23	29	82	84	84
Current monthly	32	23	28	20	10	16	17	11	14	23	15	20	23	21	26	82	85	84

Base: All Adults 1,047

Looking beyond the next month, there is further evidence of a positive shift in potential usage in 2-3 months time.

Base: All Adults 1,047



May/June 2021

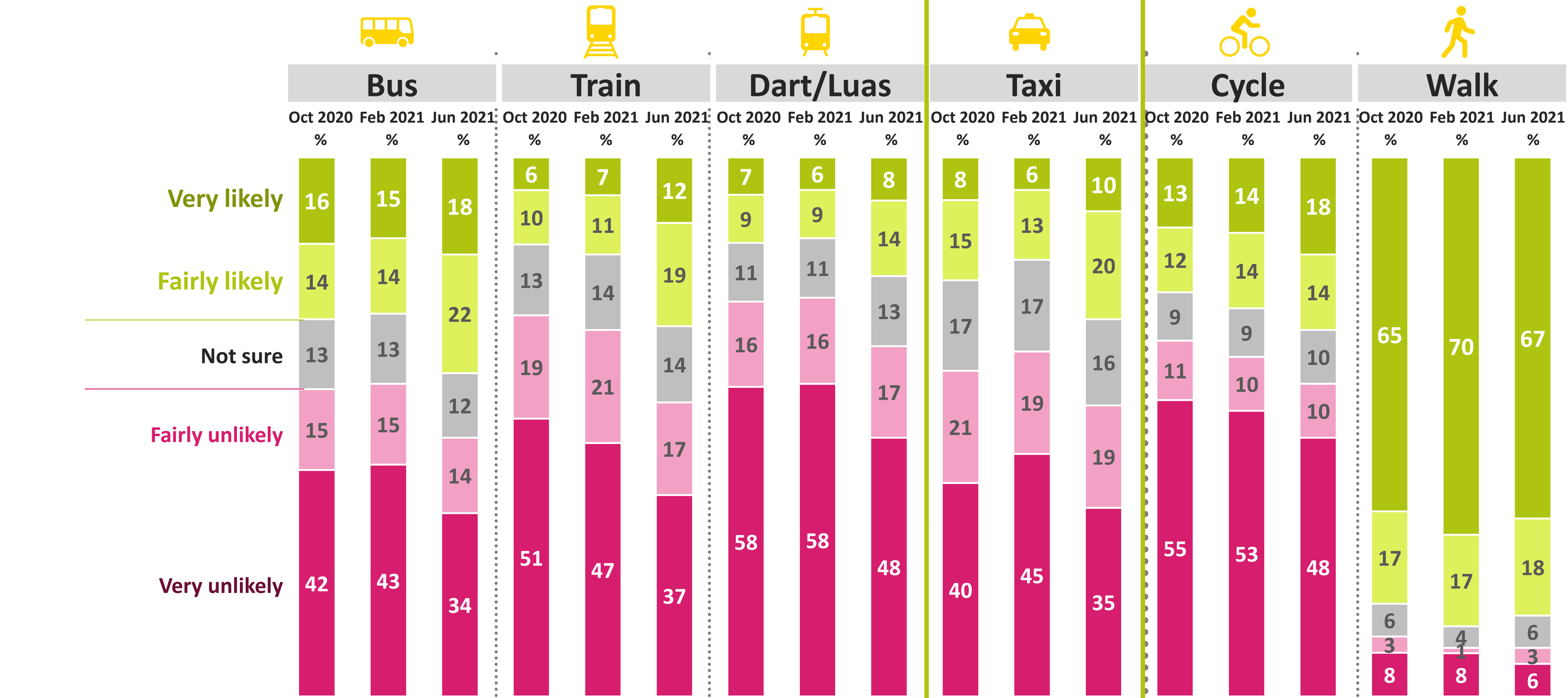
Encouragingly, there is a significant increase in Public Transport projected usage in 2-3 months time

Estimates of +31% for taxis

Compared with current position

Clear evidence of an anticipated increase in Public Transport usage as we look forward to the third quarter of the year, including cycling. Most significant projected increase is for train services. Higher proportion than October projected taxi usage in 2-3 months.

Base: All adults 1,047

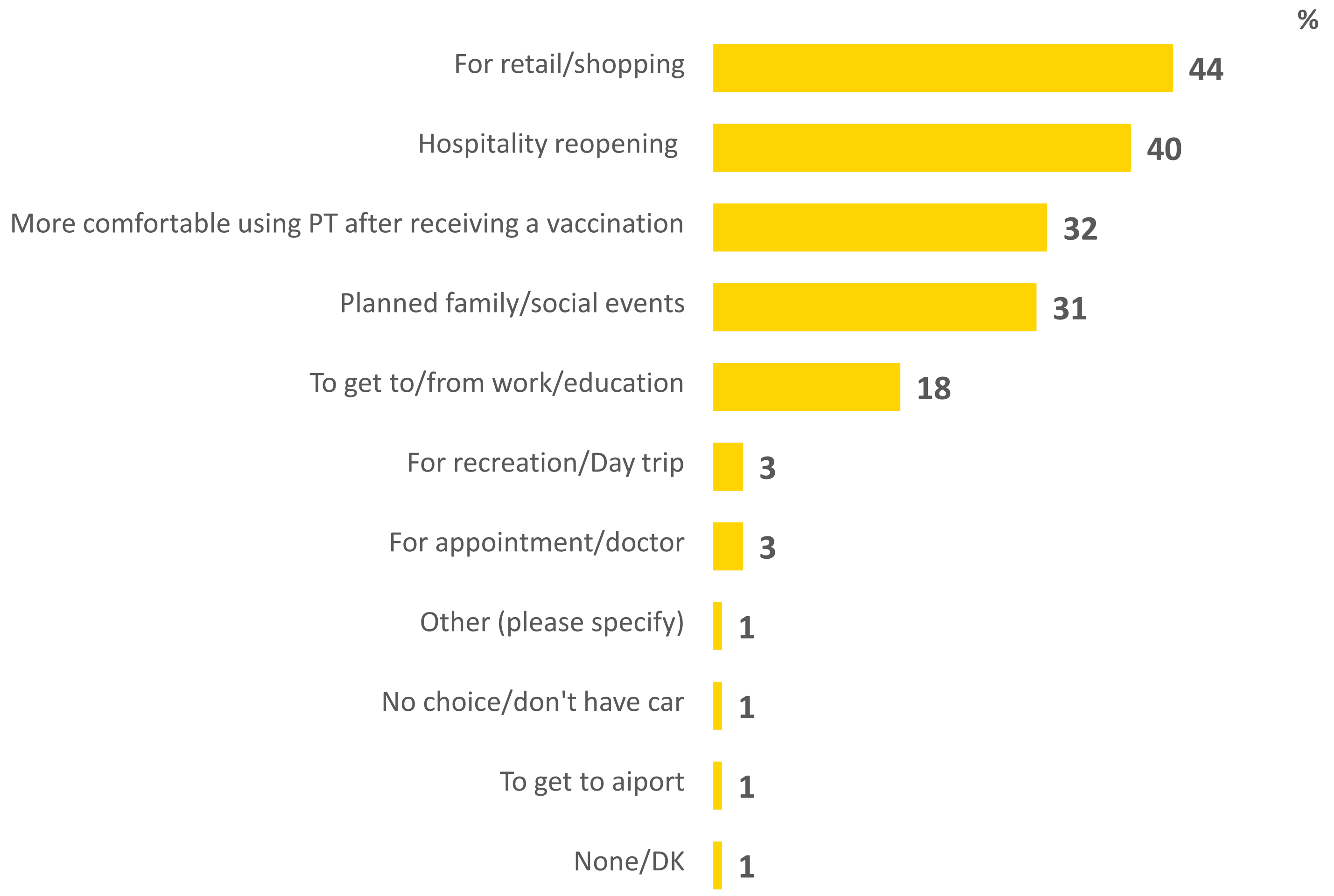


	Bus Oct 2020	Bus Feb 2021	Bus Jun 2021	Train Oct 2020	Train Feb 2021	Train Jun 2021	Dart/Luas Oct 2020	Dart/Luas Feb 2021	Dart/Luas Jun 2021	Taxi Oct 2020	Taxi Feb 2021	Taxi Jun 2021	Cycle Oct 2020	Cycle Feb 2021	Cycle Jun 2021	Walk Oct 2020	Walk Feb 2021	Walk Jun 2021
Any likely in 2-3 months	30	30	40	16	18	31	16	15	22	23	18	29	25	28	32	82	87	85
Current monthly	32	23	28	20	10	16	17	11	14	23	15	20	23	21	26	82	85	84
From current position			+30%			+48%			+36%			+31%			+19%			

May/June 2021

Looking forward, retail/shopping is a key driver for renewed use of Public Transport

Base: All Adults 1,047



Reasons for future taxi usage

	Total	Age					Region			
		18-24	25-34	35-49	50-64	65+	Dublin	RoL	Munster	Conn/ Uls
Base	1047	112	195	334	223	183	302	276	263	206
Reason for usage	%	%	%	%	%	%	%	%	%	%
For retail/shopping	44	69	44	37	37	46	49	42	40	44
Hospitality is reopening (e.g. bars, restaurants, etc)	40	42	42	41	37	39	52	32	40	35
I am more comfortable using PT after receiving a vaccination	32	17	18	27	40	50	37	32	31	23
Planned family/social events	31	42	36	30	22	31	35	26	27	35
To get to/from work/education	18	43	23	20	10	5	23	18	11	21
For recreation/Day trip	3	1	1	5	4	2	3	3	4	2
For appointment/doctor	3	1	1	2	1	8	1	4	2	4
No choice/don't have car	1	-	-	-	2	1	-	1	1	1
To get to aiport	1	-	1	1	1	1	1	1	1	1
Other	1	-	1	1	0	1	-	1	1	1

Base: All Adults 1,047

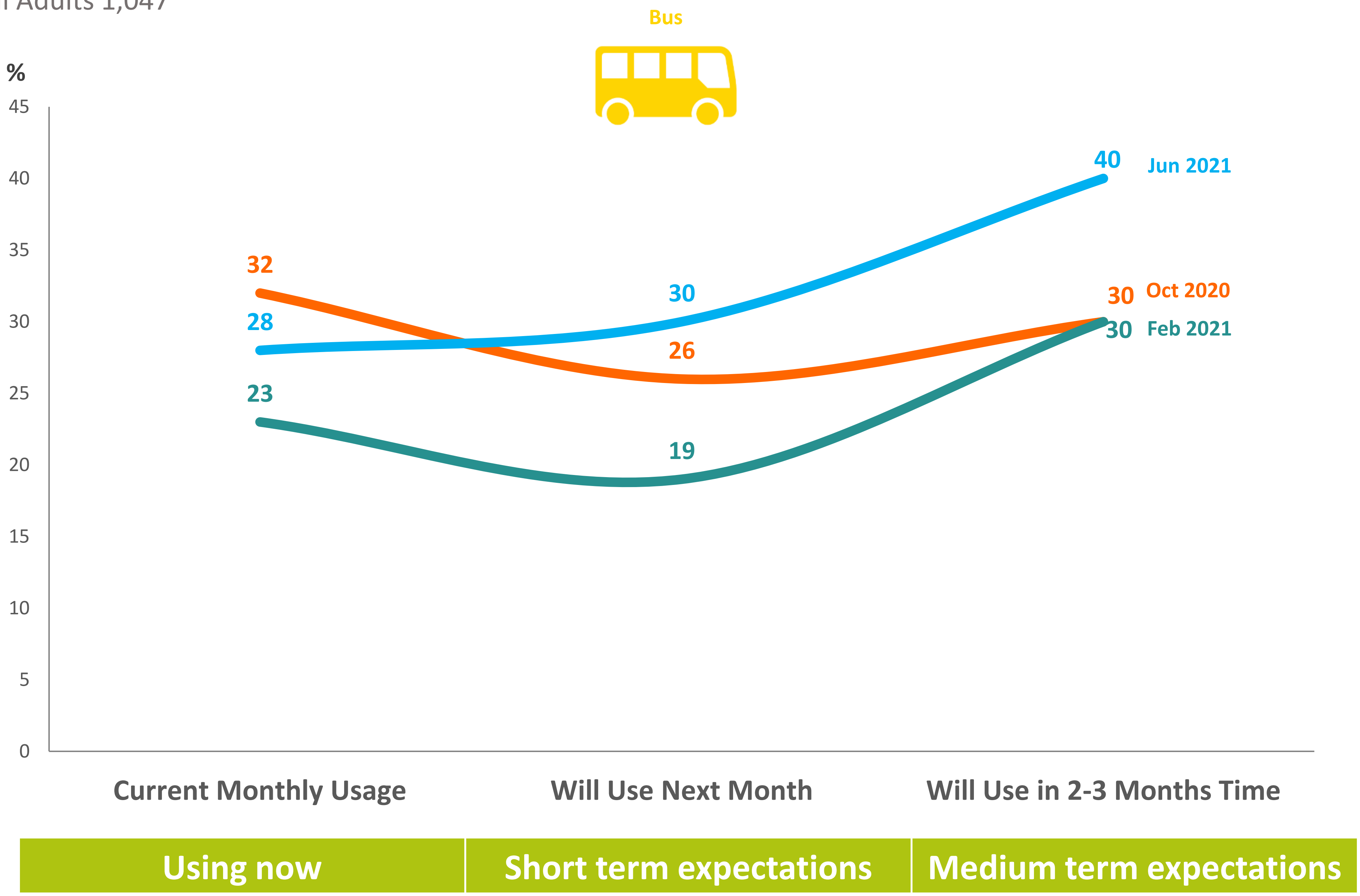
Pattern of potential Taxi usage draws on a higher than average occasional usage for hospitality. Positive to see that current non users cautiously seeing a role for all forms of Public Transport.

		Current usage											
		Bus frequency			**Train Frequency**			**Tram/Luas Frequency**			**Taxi Frequency**		
	Total	Weekly+	Less often	Not now	Weekly+	Less often	Not now	Weekly+	Less often	Not now	Weekly+	Less often	Not now
	1047	160	572	315	51	673	323	52	565	430	53	710	284
	%	%	%	%	%	%	%	%	%	%	%	%	%
For retail/shopping	44	66	45	29	62	48	31	60	48	37	57	45	38
Hospitality is reopening (e.g. bars, restaurants, etc.)	40	47	41	34	41	42	35	52	45	33	40	47	24
I am more comfortable using PT after receiving a vaccination	32	31	39	20	29	37	21	35	38	23	28	35	25
Planned family/social events	31	41	32	24	41	33	25	35	32	28	34	32	27
To get to/from work/education	18	45	15	10	44	18	14	45	18	16	25	17	18
For recreation/Day trip	3	3	2	5	-	3	4	-	4	2	-	2	6
For appointment/doctor	3	2	4	2	2	3	3	2	3	2	2	3	1
No choice/don't have car	1	1	1	0	-	1	0	-	1	1	-	1	1
To get to airport	1	-	1	1	-	1	1	-	1	1	-	1	0
Other	1	1	1	1	-	0	1	-	1	1	-	1	1

Base: All Adults 1,047

Bus: Current and projected usage:
Gradual growth to higher levels expected

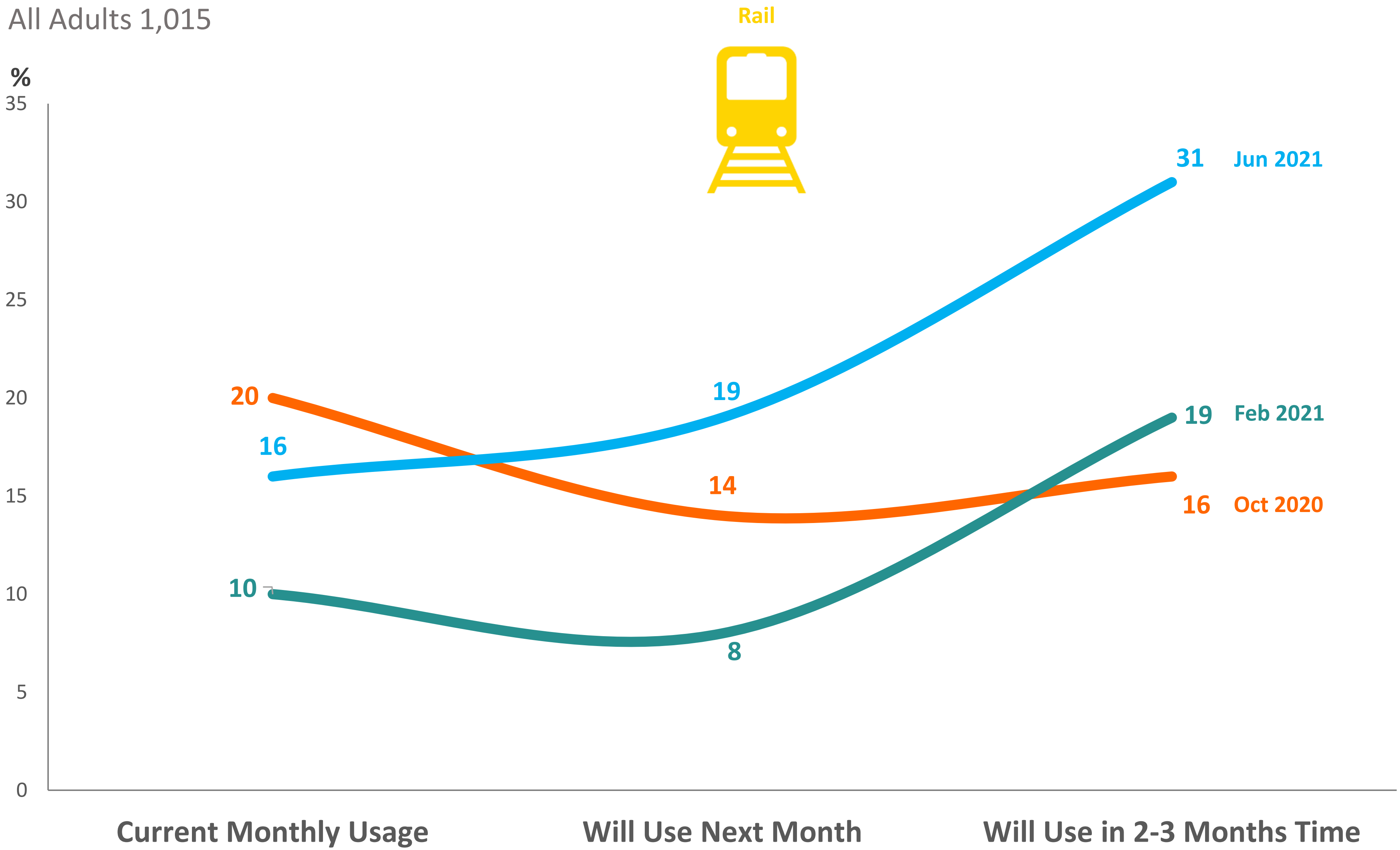
Base: All Adults 1,047



May/June 2021

Rail: Current and projected usage:
Significant growth but reasonably stable at moment

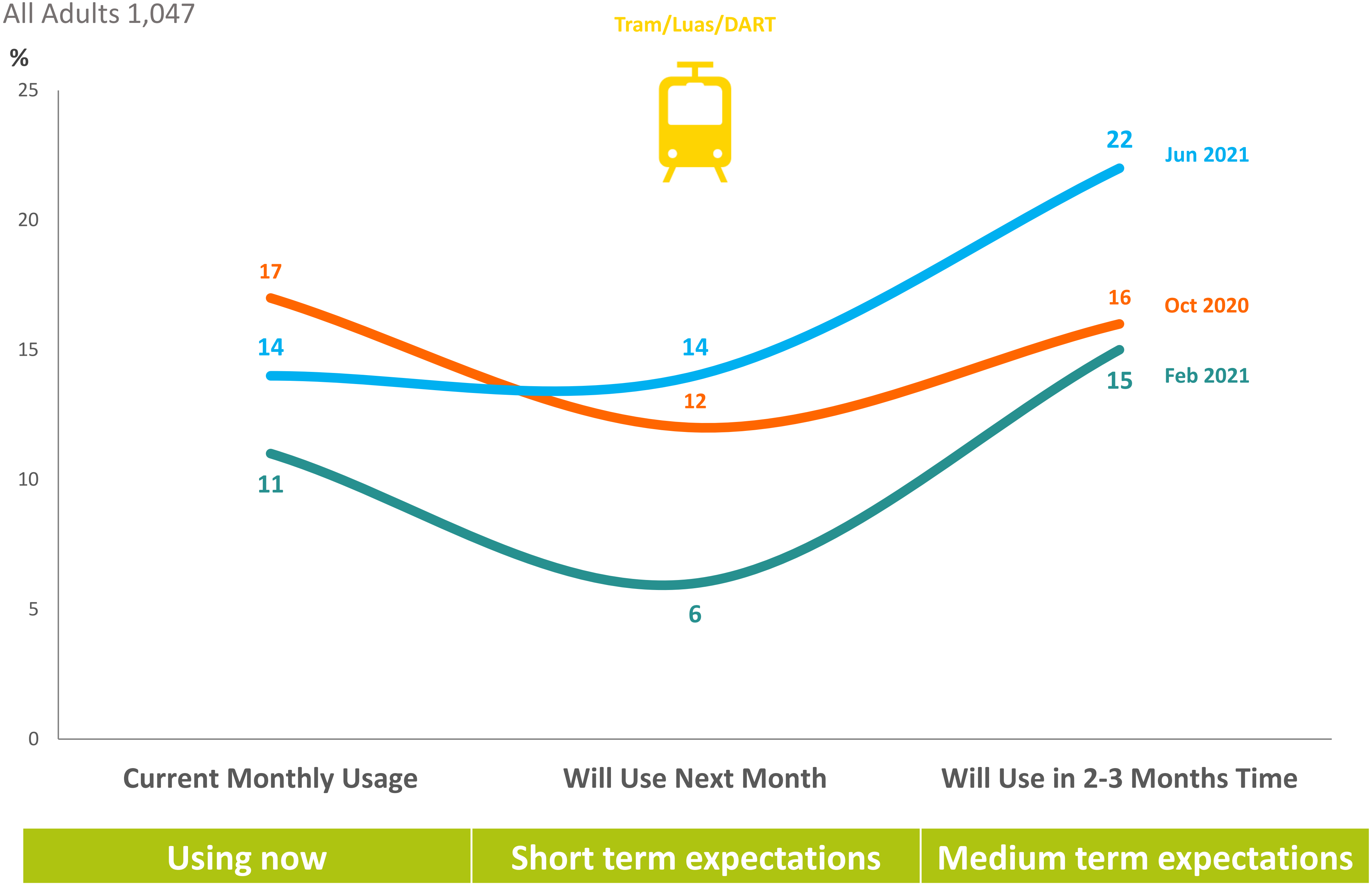
Base: All Adults 1,015



Using now	Short term expectations	Medium term expectations

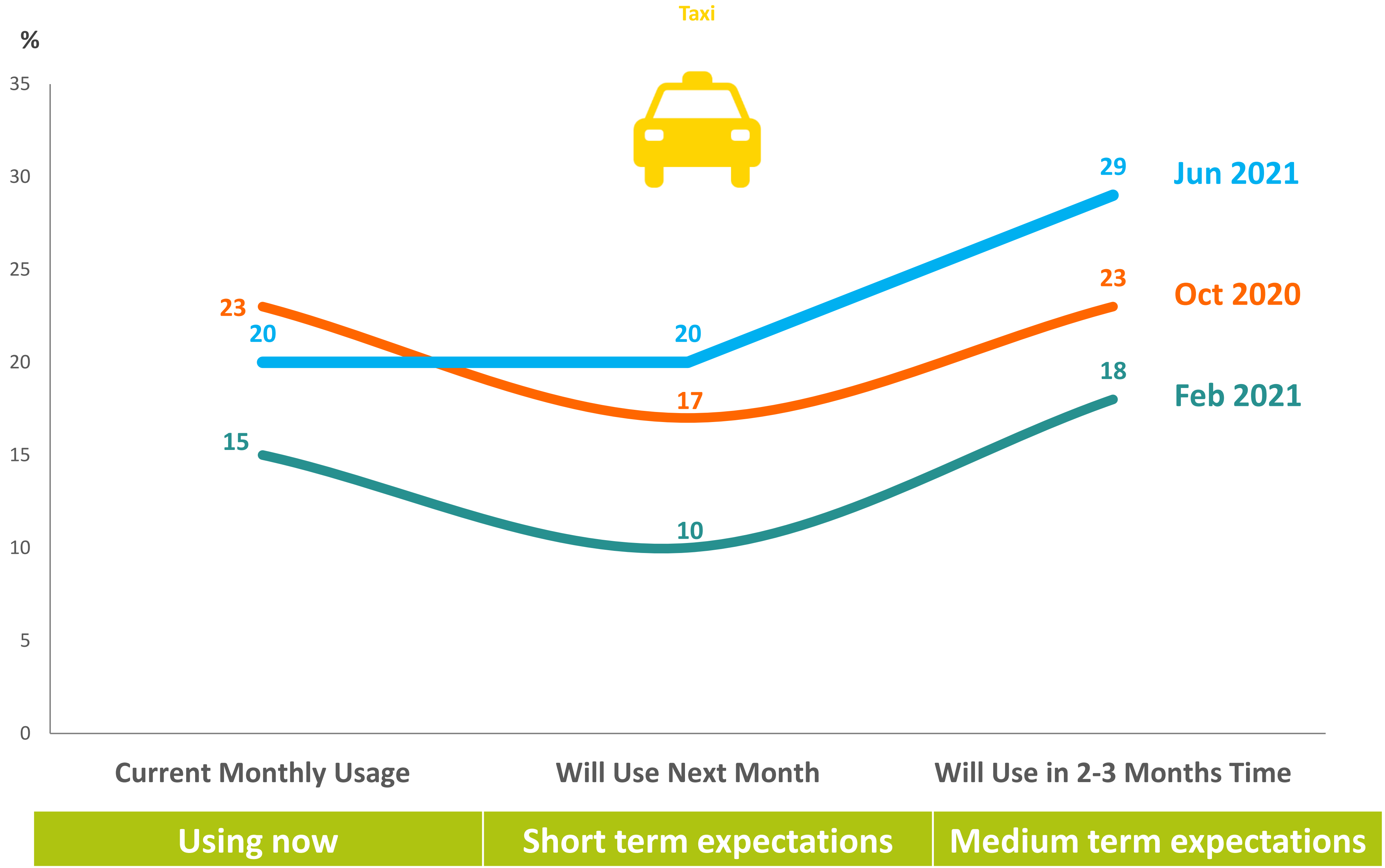
TRAM: Current and projected usage:
Tram also following a similar pathway. Stable in immediate term but expected growth over next 2-3 months.

Base: All Adults 1,047



Taxi : Current and projected usage:
Where previously only modest growth from current was projected, expectations of usage are more significant in 2-3 months time.

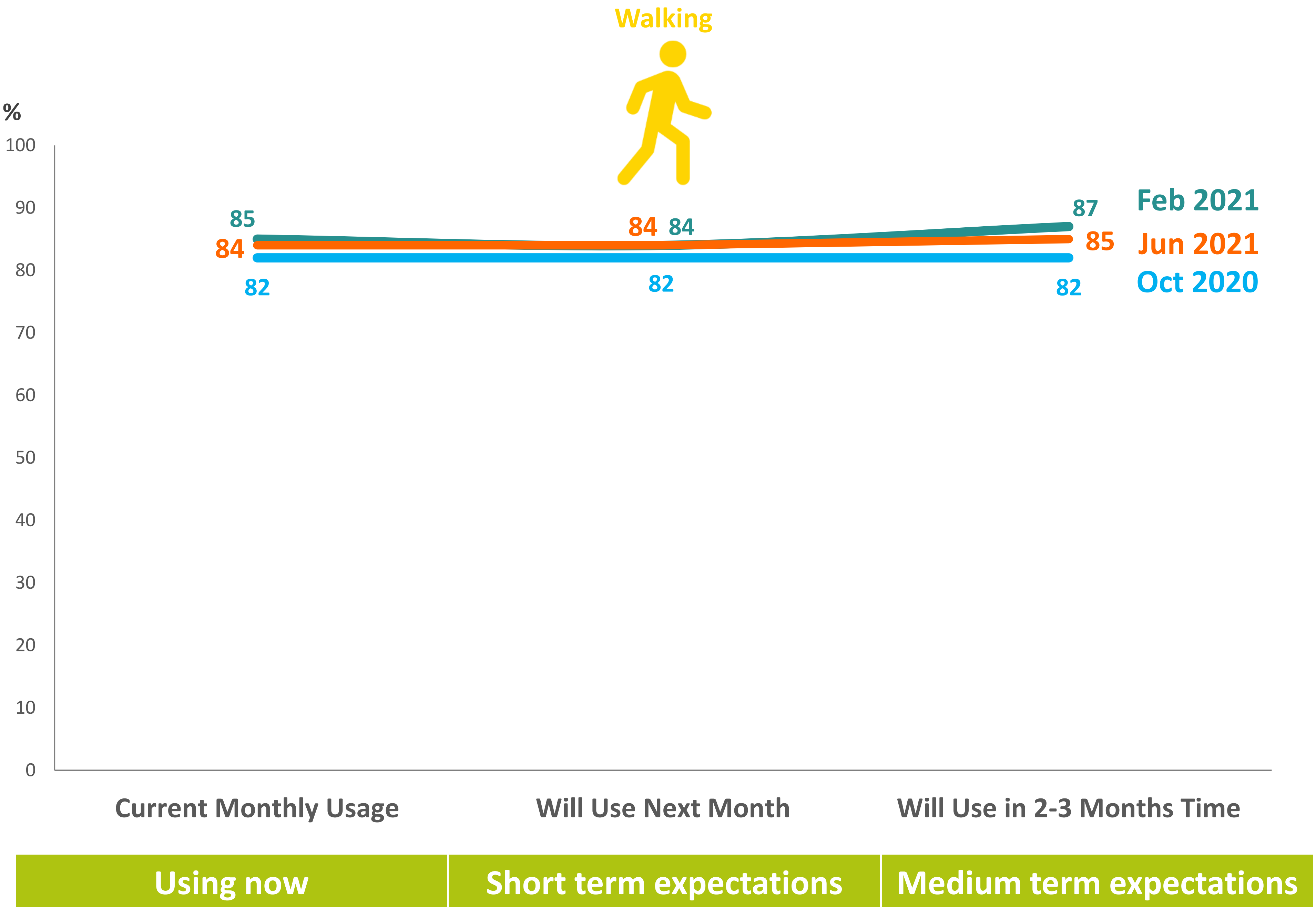
Base: All Adults 1,047



May/June 2021

Walking: Current and projected usage:

Base: All Adults 1,047

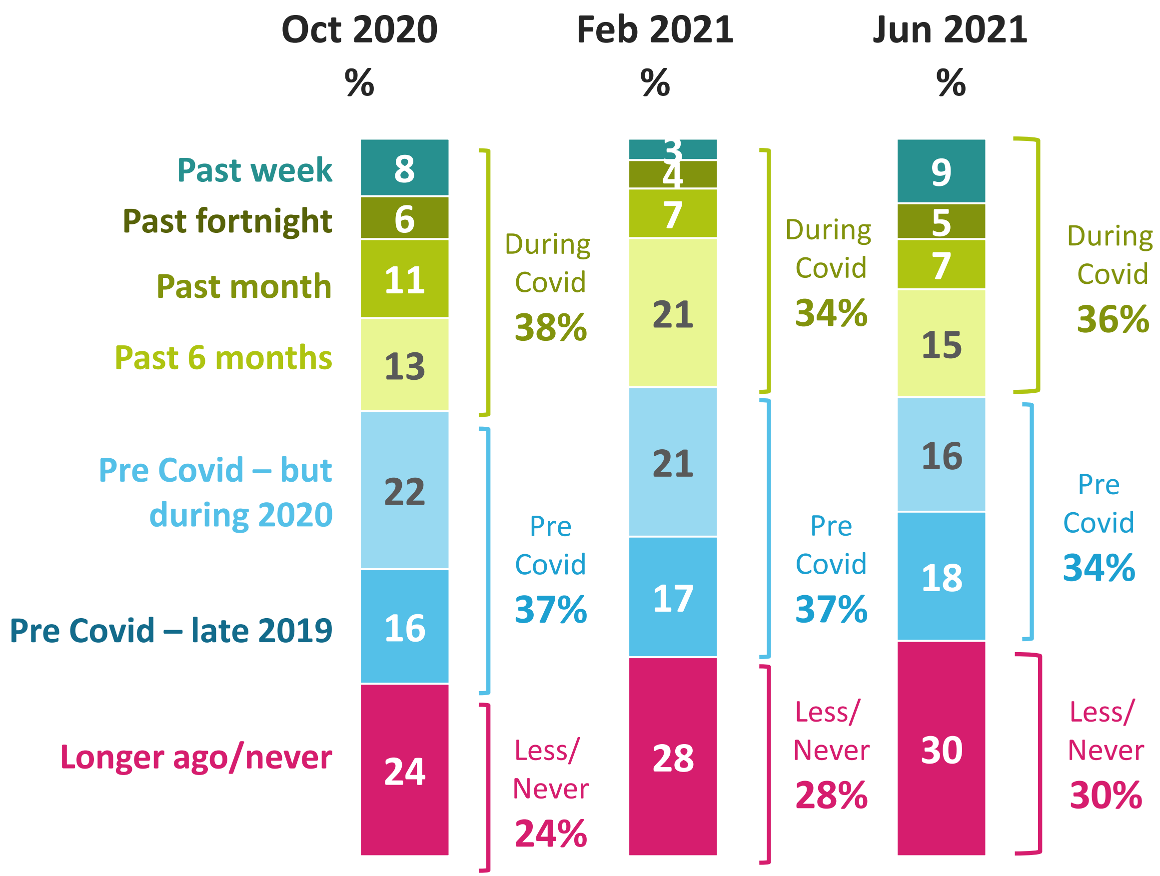


May/June 2021

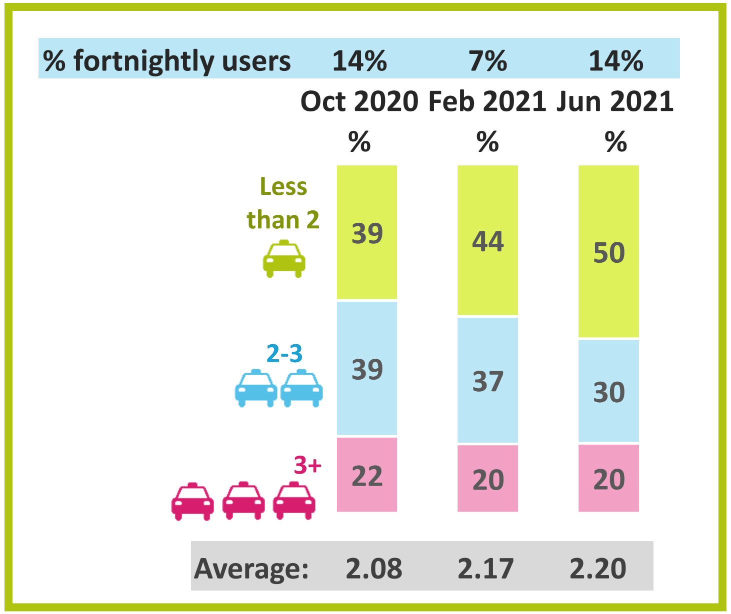
2. How has consumer demand changed?

36% have experience of using a taxi during the Covid pandemic (similar to previous waves). A higher number of 1 in 7 used a taxi in past fortnight compared with 1 in 14 in February. The average number of usage occasions is stable but as the user base has returned to October levels this creates a substantial increase in volume estimates.

Base: All adults 1,047



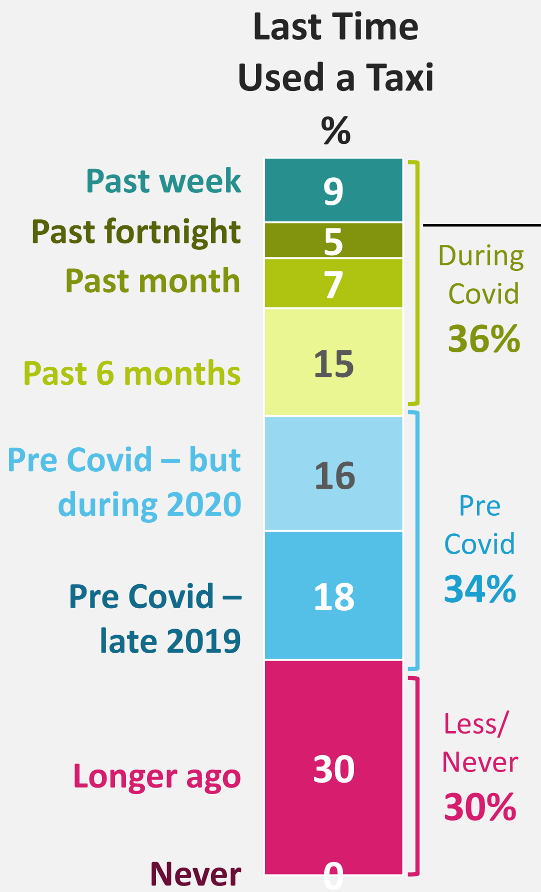
No. of taxis taken in past fortnight

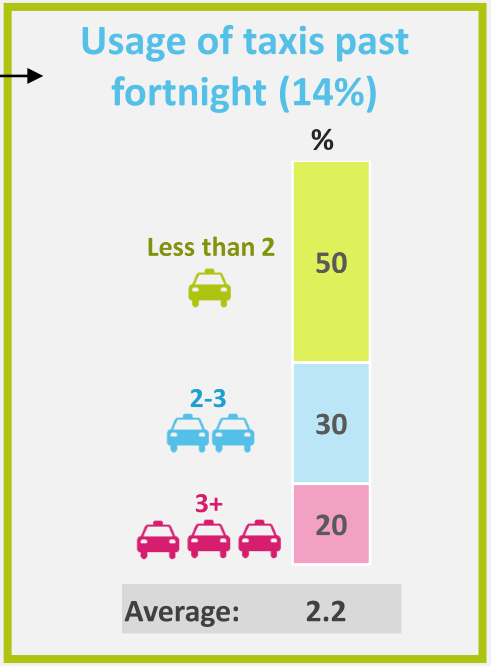


Recency	User base estimates		
	Oct 20	Feb 21	Jun 21
Past week	300,000	120,000	320,000
Past fortnight	225,000	130,000	190,000
Journeys past fortnight (x average number)	**1,092,000**	**542,000**	**1,122,000**
	-50% vs Oct		**+52% vs Feb**

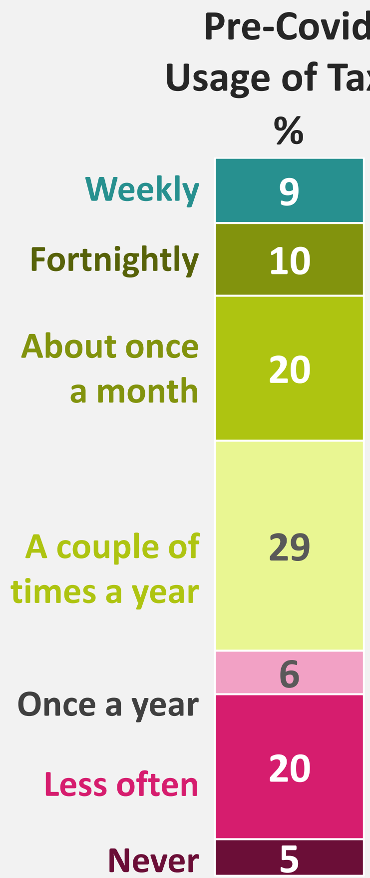
User base estimates = Sum of population estimates for past week users and past fortnight users x average number of taxis taken. We then calculate the percentage increase of journeys since the previous waves

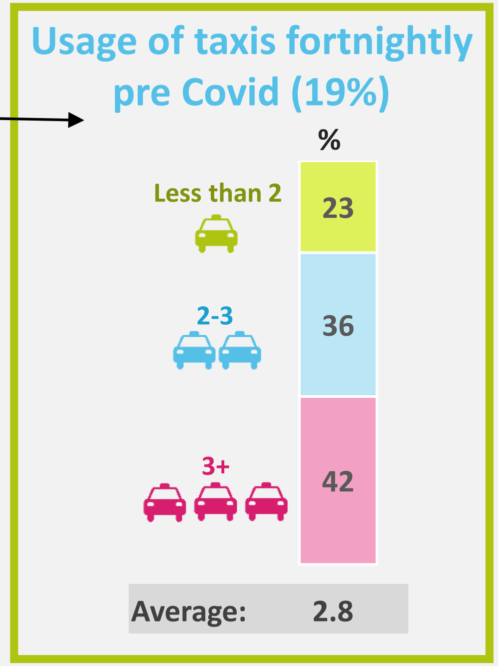
Current vs pre Covid consumer usage estimates: Consumer estimates have improved to -45% vs pre-Covid compared with -73% reported in February





Recency	User base estimate
Past week	320,000
Past fortnight	190,000
Journeys past fortnight (x 2.20)	**1,122,000**





Diff vs pre-Covid

-73% Feb
-45% June

Frequency	User base estimate
Weekly	340,000
Fortnightly	385,000
Journeys past fortnight (x 2.80)	**2,030,000**

User base estimates = Sum of population estimates for past week users and past fortnight users x average number of taxis taken. We then calculate the percentage decrease of journeys in comparison with pre-COVID usage estimates.

Base: All adults 1,047

May/June 2021

Taxi usage comparisons on order and duration. pre-ordering a taxi by phone the most popular ordering approach (app usage lower than previous research waves).

Base: All used taxi in past fortnight

Method used to get taxi

	Net Past Fortnight		
	Oct 2020	Feb 2021	Jun 21
Base (unweighted):	*159*	*79*	*146*
	%	%	%
Ordered it by phone (spoke to someone)	42	37	**44**
Ordered it using an app	39	38	**28**
Picked up at a rank	12	14	15
Hailed it	5	5	10
Booked by my employer/company	-	5	1
Other	1	-	1

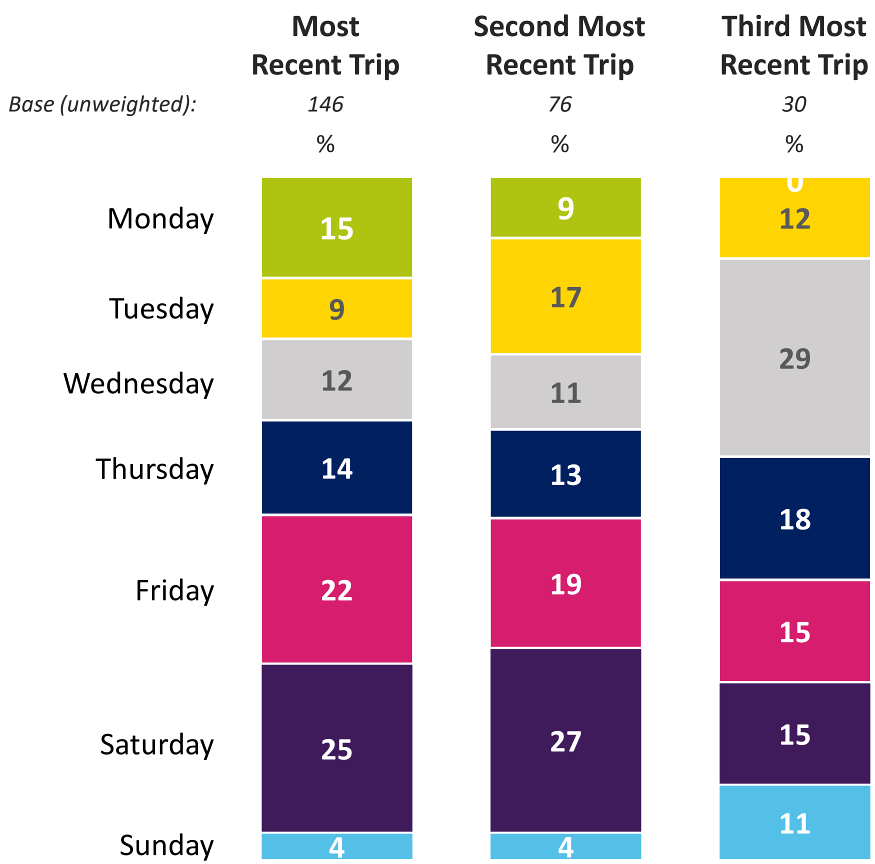
Duration of journey

	Net Past Fortnight		
	Oct 2020	Feb 2021	Jun 21
Base (unweighted):	*159*	*79*	*146*
	%	%	%
Less than 5 minutes	6	14	12
5-10 minutes	35	28	26
11-15 minutes	32	29	33
16-20 minutes	17	17	18
Over 21 minutes	10	12	10

Taxi usage comparisons. Visible variations in both day of week used and also time of day.

Base: All used taxi in past two weeks - 59

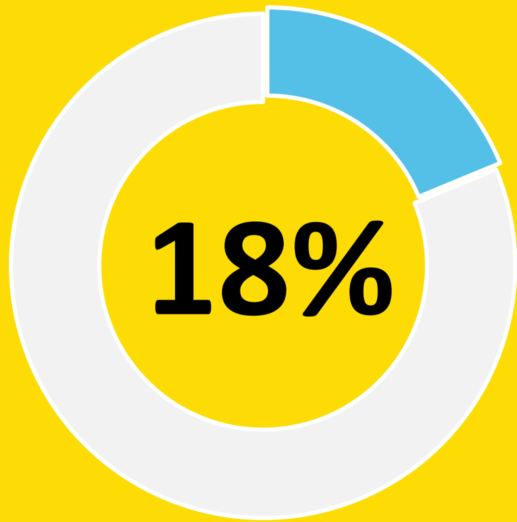
Day of week



Time of day

	Most Recent Trip	Second Most Recent Trip	Third Most Recent Trip
Base (unweighted):	*146*	*76*	*30*
	%	%	%
06:00 – 07:59	4	8	11
08:00 – 09:59	6	7	2
10:00 – 11:59	13	13	**24**
12:00 – 13:59	10	14	7
14:00 – 15:59	12	10	15
16:00 – 17:59	9	10	7
18:00 – 19:59	7	10	11
20:00 – 21:59	**10**	7	10
22:00 – 23:59	**10**	13	-
00:00 – 03:59	**17**	7	9
04:00 – 05:59	1	1	4

There are some method order
shifts (more phone), day of we
(more weekend) and time of d
shifts apparent (more after midn

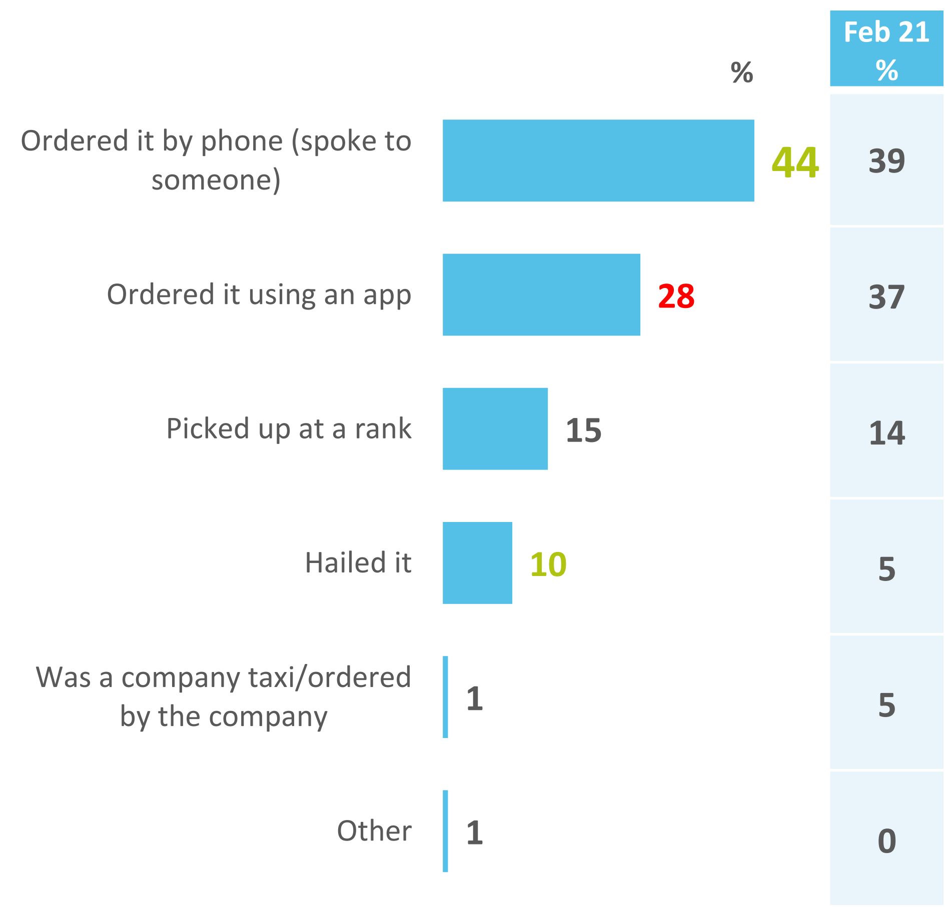


used a taxi after
midnight
(versus 6% Feb 21)

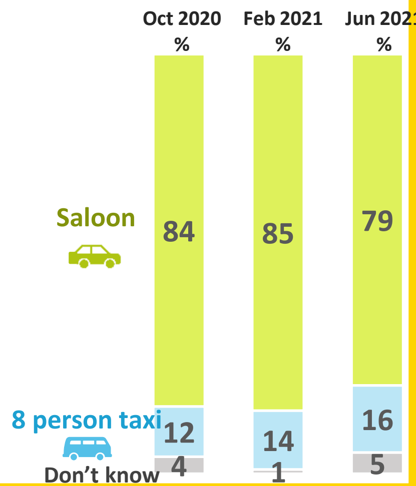
Recent taxi usage norms: App and phone usage remains most common way to access a taxi currently. Friday is the most popular day with evidence of a shift towards daytime usage.

Method used to get taxi

Base: All used taxi in **past fortnight** – 146



Vehicle type

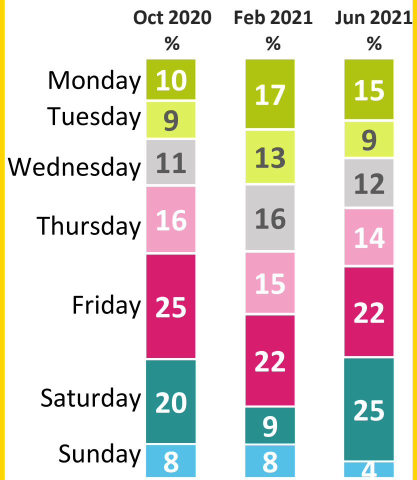


23%

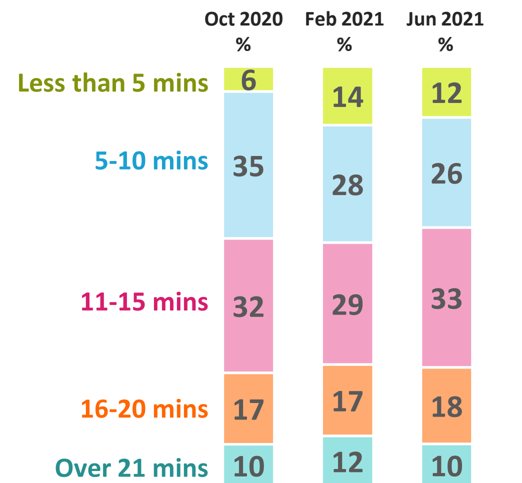
(15%)

of taxis used **had wheelchair access**

Day of week



Duration of journey



Time of day

	Oct 2020 %	Feb 2021 %	Jun 2021 %
06:00 – 07:59	1	6	4
08:00 – 09:59	5	**14**	6
10:00 – 11:59	8	4	13
12:00 – 13:59	10	**15**	10
14:00 – 15:59	13	**20**	12
16:00 – 17:59	8	14	9
18:00 – 19:59	15	9	7
20:00 – 21:59	14	8	10
22:00 – 23:59	13	7	10
00:00 – 03:59	13	3	17
04:00 – 05:59	1	-	1

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

May/June 2021

() = Feb 2021

Outside Dublin influencing the use of phone to order taxi at a national level

Base: All used taxi past year - 567

	Total	Region			
		Dublin	RoL	Munster	Conn/Uls
	567	*205*	*122*	*137*	*103*
	%	%	%	%	%
Hailed it	10	**16**	10	5	6
Picked up at a rank	17	16	**20**	13	**20**
Ordered it by phone (spoke to someone)	39	20	44	**52**	**54**
Ordered it using an app	31	**45**	20	28	16
Was a company taxi/ordered by the company	2	1	5	-	4
Other (specify)	1	2	-	3	-
Other (specify)	1	2	-	3	-

Taxi usage comparisons (multi-day usage included). Daily use shift towards Saturday as are the late hour shifts.

Base: All used taxi in past two weeks - 146

Day of week used over past fortnight

	All people taking taxi in past fortnight	Feb '21 %
Base (unweighted):	*146*	*79*
	%	%
Monday	17	23
Tuesday	17	19
Wednesday	20	24
Thursday	22	24
Friday	30	**37**
Saturday	**34**	19
Sunday	7	8

Time of day taxi used over past fortnight

	All people taking taxi in past fortnight	Feb '21 %
Base (unweighted):	*146*	*79*
	%	%
06:00 – 07:59	6	8
08:00 – 09:59	9	15
10:00 – 11:59	**16**	8
12:00 – 13:59	17	**22**
14:00 – 15:59	18	**29**
16:00 – 17:59	14	**21**
18:00 – 19:59	12	**18**
20:00 – 21:59	**14**	10
22:00 – 23:59	**15**	8
00:00 – 03:59	**19**	5
04:00 – 05:59	2	1

Share of estimated journeys in past 2 weeks and across day parts (all multi users counted)

Base: All used taxi in past two weeks - 146

Day of week used over past fortnight

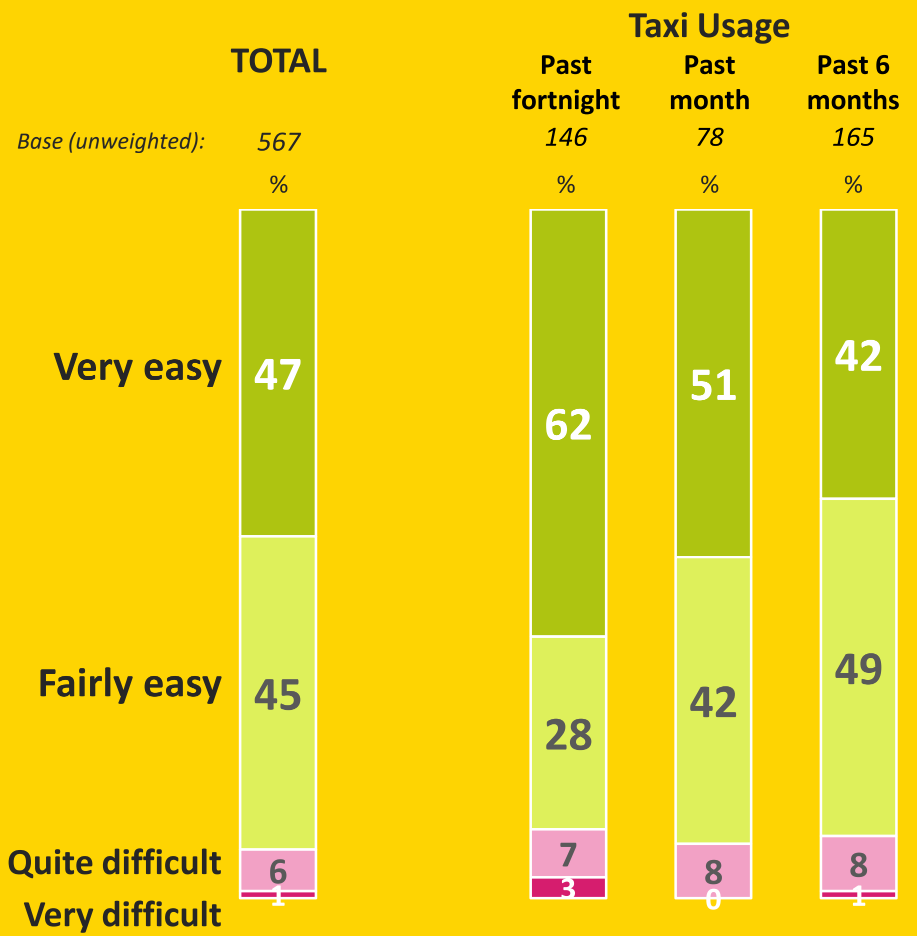
	Trip by day of week	*Est no. of journeys*
	%	**1.122m**
Monday	12	134.6k
Tuesday	11	123.4k
Wednesday	13	145.9k
Thursday	14	157.0k
Friday	21	235.6k
Saturday	25	280.5k
Sunday	5	56.1k

Time of day taxi used over past fortnight

	Total trips by time of day	*Est no. of journeys*
	%	**1.122m**
06:00 – 07:59	6	67.3k
08:00 – 09:59	6	67.3k
10:00 – 11:59	14	157.0k
12:00 – 13:59	11	123.4k
14:00 – 15:59	11	123.4k
16:00 – 17:59	9	101.0k
18:00 – 19:59	8	89.8k
20:00 – 21:59	9	101.0k
22:00 – 23:59	10	112.2k
00:00 – 03:59	13	145.9k
04:00 – 05:59	1	11.2k

92%

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

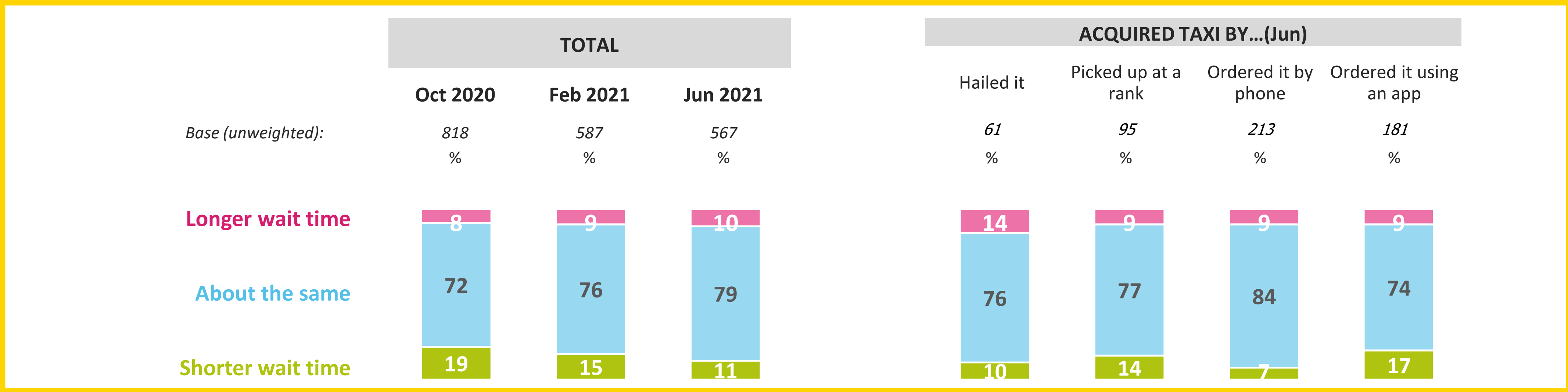


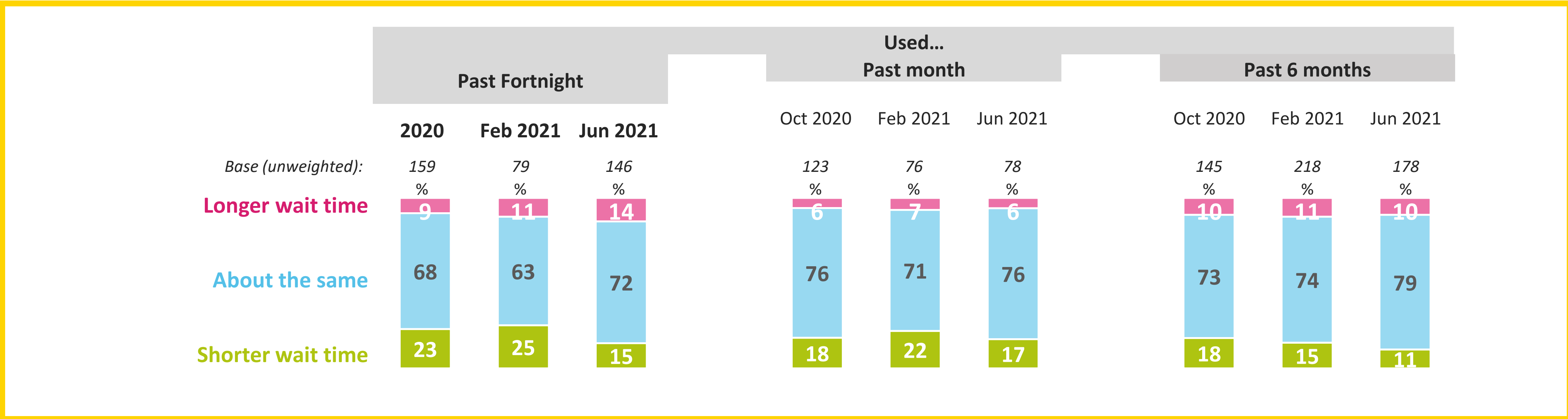
	TOTAL		Past fortnight	Past month	Past 6 months
Feb Very easy	46		58	44	46

Ease of getting a taxi: Majority reporting wait time much the same as pre Covid

Base: All used taxi in past year - 567

Wait time compared with pre Covid

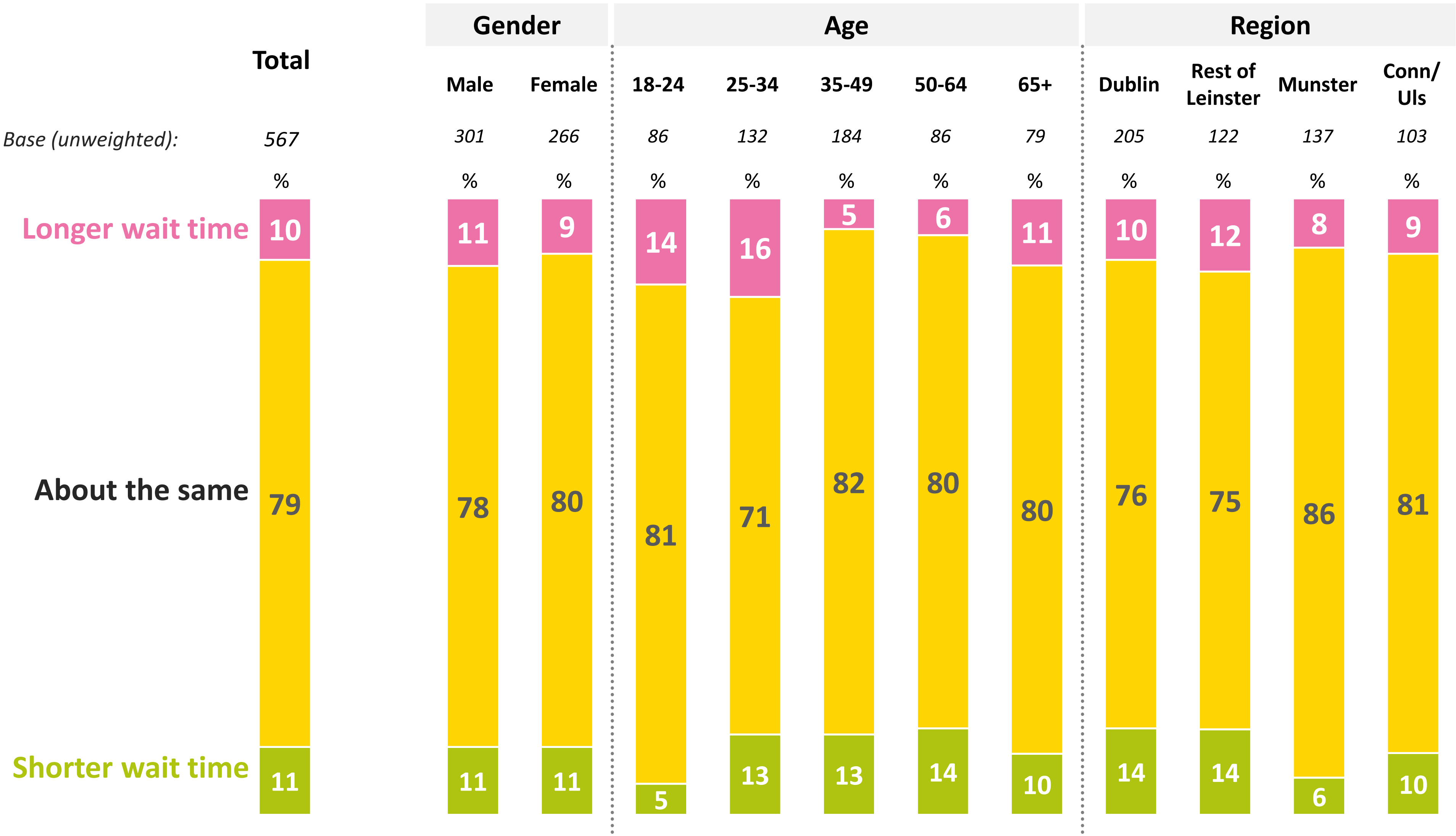




Ease of getting a taxi: Wait times now much the same as pre Covid

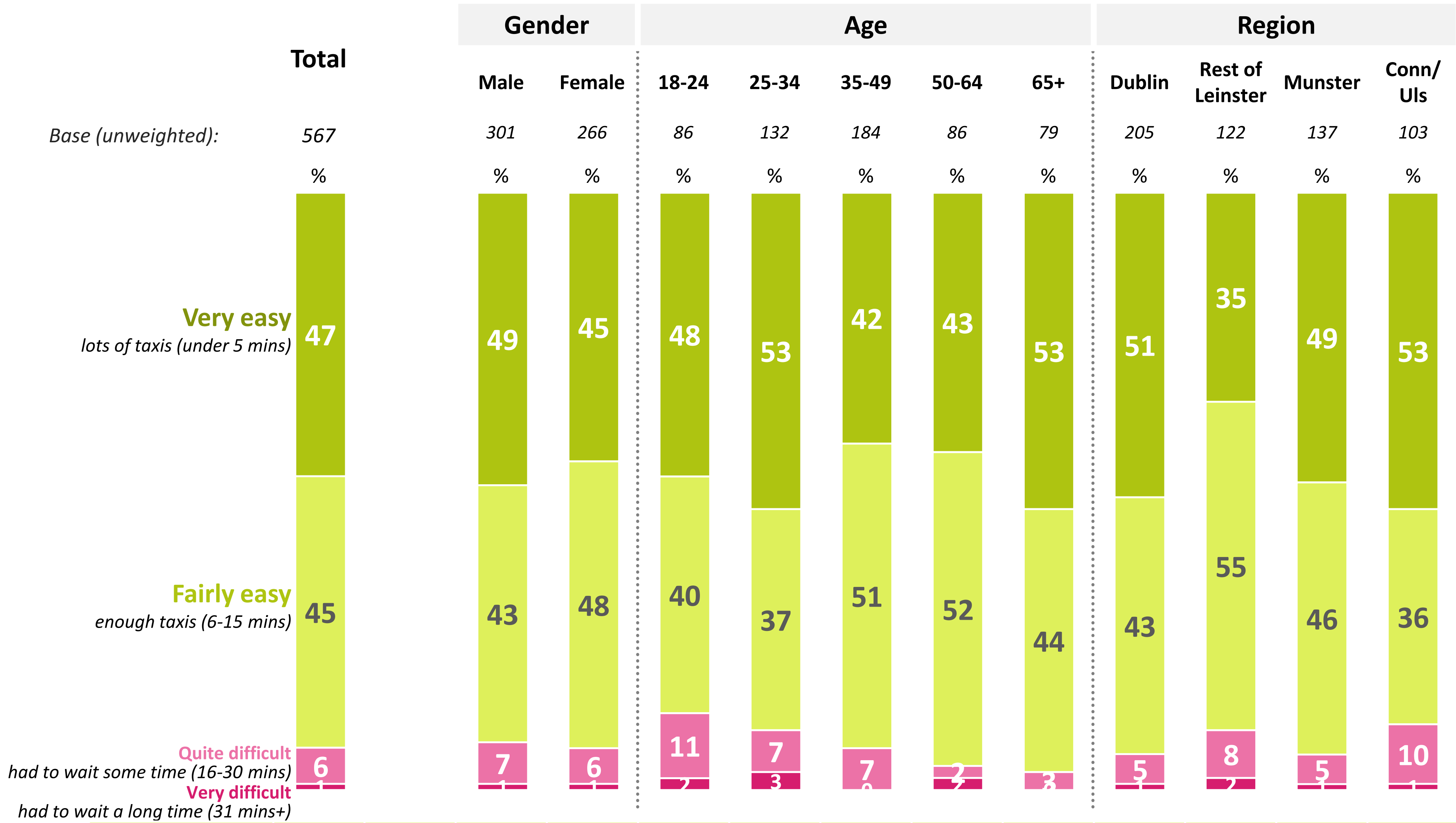
Base: All used taxi in past year - 567

Wait time compared with pre Covid



No issues with taxi access little difference across demographics

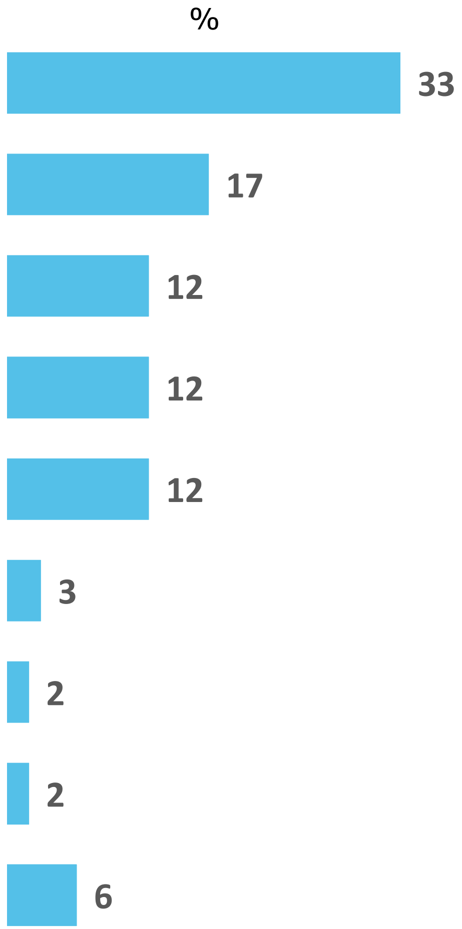
Base: All used taxi in past year - 567



	Total		Male	Female	18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Conn/ Uls
NET (Easy)	92		92	93	88	90	93	95	97	93	90	95	89
NET (Difficult)	8		8	7	12	10	7	5	3	7	10	5	11

Main purpose of journey: Work, visiting friends and family and leisure dominate current usage

Base: All used taxi in past year - 567



	%	Past Fortnight	Past month	Past 6 months	Pre Covid-19, although during 2020
		146	78	165	178
		%	%	%	%
For leisure purposes (restaurant, pub, art/culture event I attended, other paid for leisure activities)	33	19	21	35	48
Visiting friends/family in their homes	17	24	14	16	13
Work	12	25	13	7	6
Shopping/Shops	12	15	20	11	7
Essential hospital visit or medical appointment (GP, Physio, Dentist, Optician etc.)	12	6	18	16	10
School/college	3	3	8	3	1
Business meeting/work meeting off site/interview etc.	2	2	-	1	5
Appointment (other such as hair-dresser, barber, beautician etc.)	2	2	5	2	2
Other	6	3	2	8	8

A shift in taxi usage to more visiting friends & family and leisure. Still overall its work, visiting friends & family and leisure in that order.

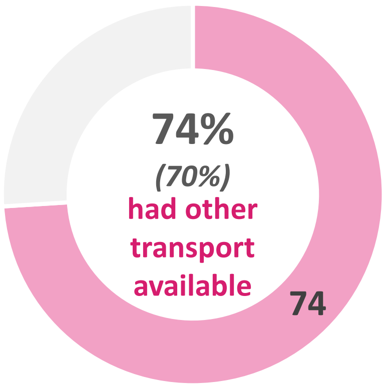
Base: All used taxi in past fortnight - 146

	Taxi Usage	
	Net Past Fortnight	
	Feb '21	June '21
	79	*146*
Reason for Usage	*%*	*%*
For leisure purposes (restaurant, pub, art/culture event I attended, other paid for leisure activities)	2	**19**
Visiting friends/family in their homes	17	**24**
Essential hospital visit or medical appointment (GP, Physio, Dentist, Optician etc.)	17	6
Work	25	25
Shopping/Shops	**29**	15
Business meeting/work meeting off site/interview etc.	4	2
School/college	-	3
Appointment (other such as hair-dresser, barber, beautician etc.)	1	2
Other	5	3

Other forms of transport available: Very large majority had other transport available. All very similar to previous research undertaken in February 2020

Base: All used taxi in past year - 567

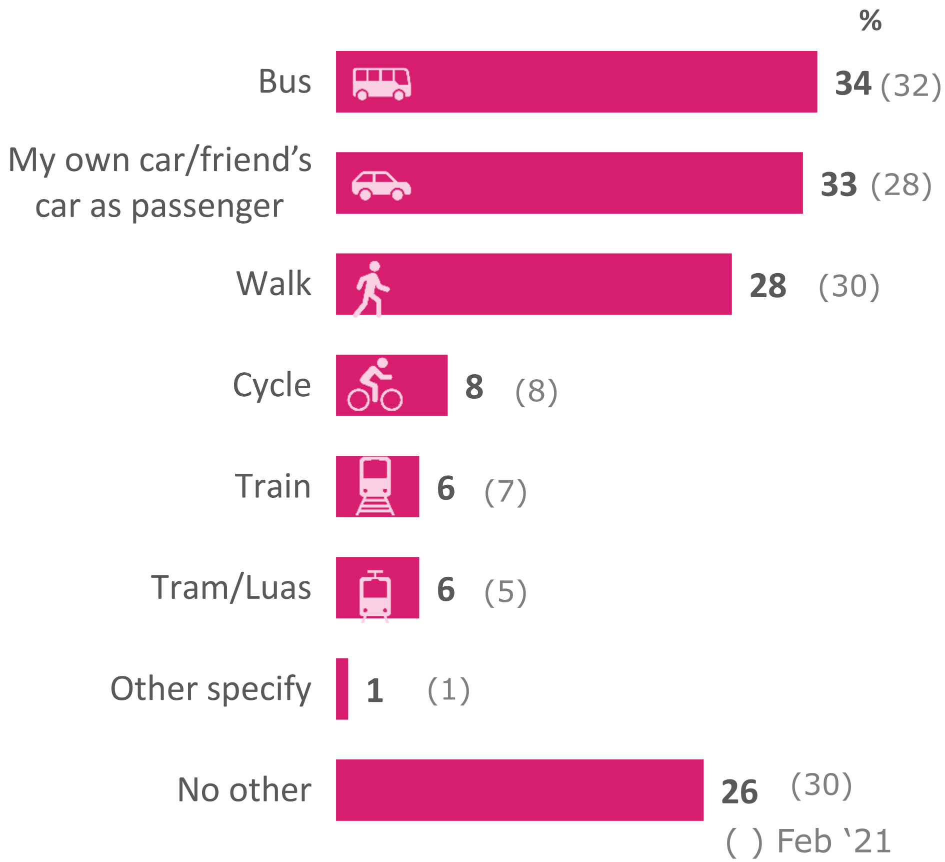
Availability of other transport



( ) Feb '21

Region		
	June '21 %	Feb '21 %
Dublin	76	71
Rest of Leinster	73	71
Munster	70	74
Conn/Ulster	77	61

Other forms of transport available



Past fortnight	
Feb '21	June '21
260	146
%	%
41	36
35	34
27	27
8	9
7	7
3	7
5	1
27	25

Reason for using a taxi over alternative options:

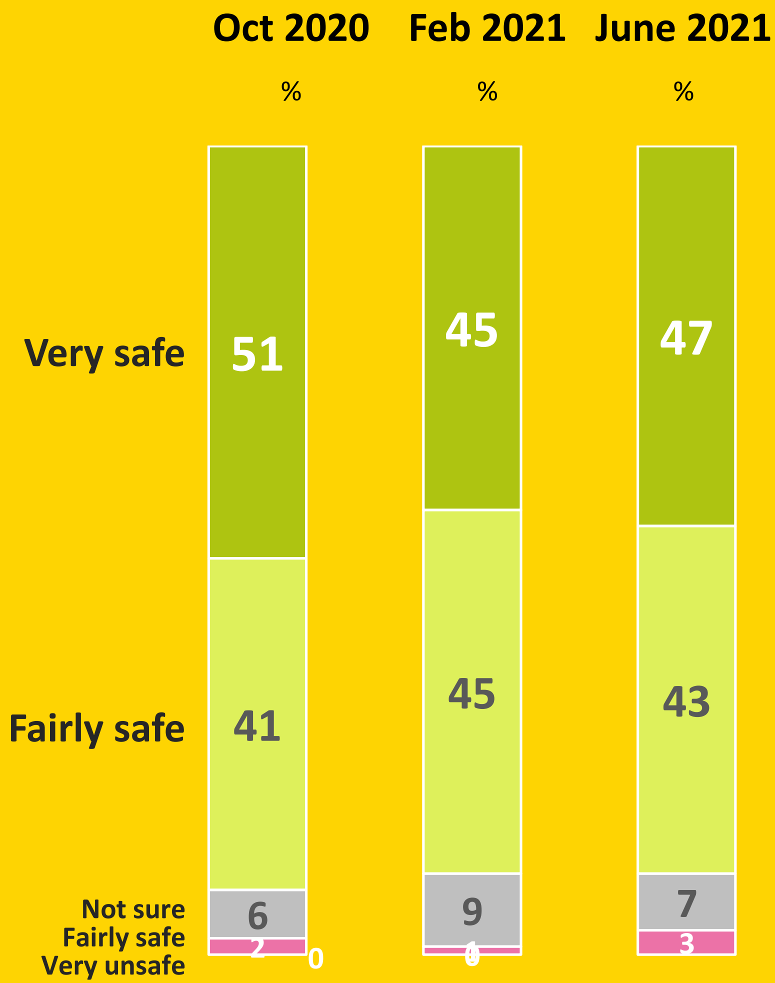
The two main reasons for selecting a taxi are convenience and speed (similar to previous measures).

Base: All with other transport available - 421

	%	Feb 21 (438) %
Easier/Convenient/Handy	29	23
Quicker/Faster	25	21
So I could have a drink/Consumed Alcohol	13	12
Safer option	8	7
Only option	7	4
Had heavy items	6	3
Didnt want to look/pay for parking	5	4
Weather was bad	3	**10**
Do not have car	3	2
Suited better than Bus	1	**9**
Dropped to door	1	4
Prefer using Taxis	1	2
Safer than walking	0	1
Direct covid mention	0	2
No reason	5	-
Other reason	2	6

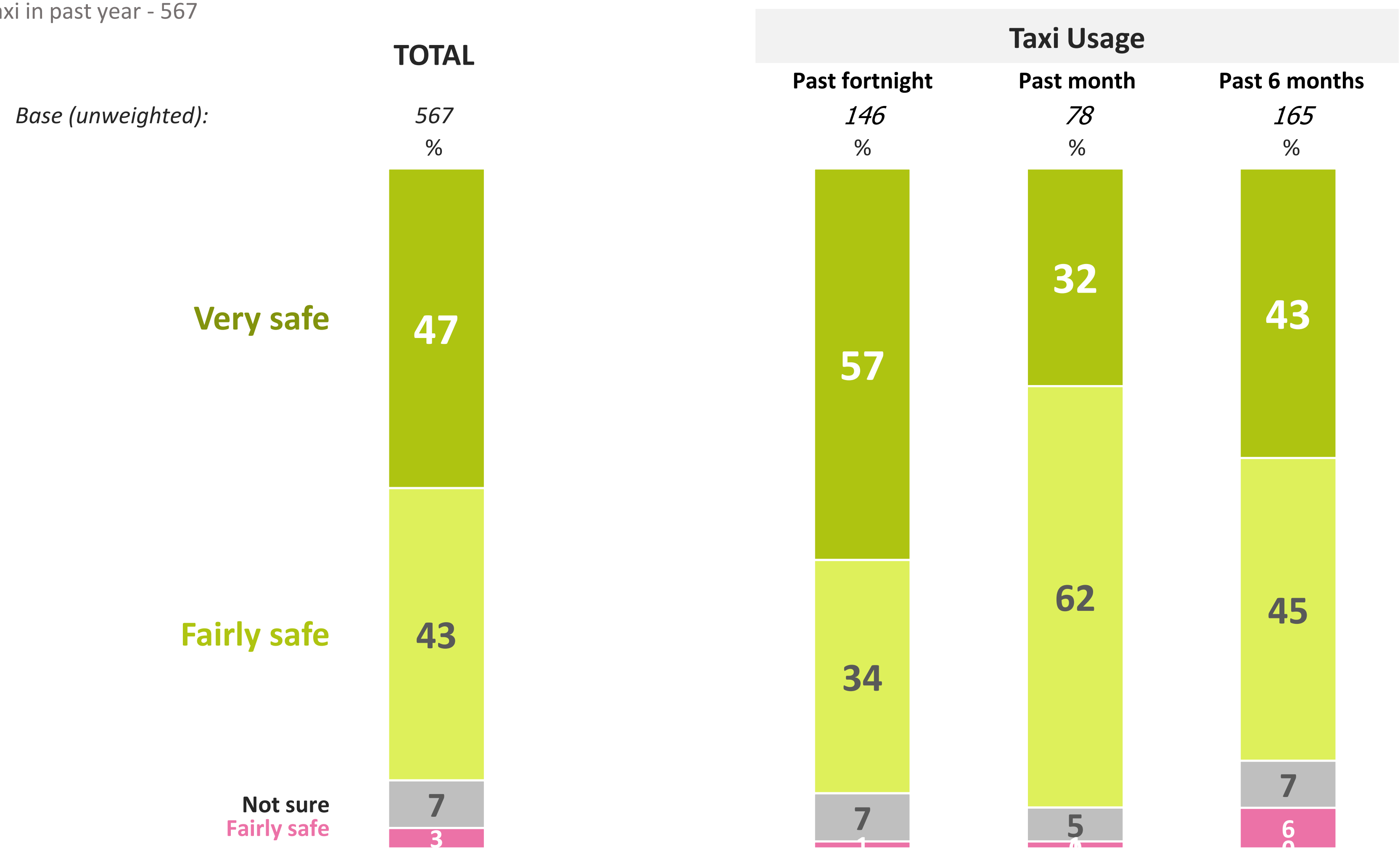
3. Covid safety measures

In the context of Covid, **90% felt safe** on their last taxi journey.



9 in 10 felt safe from Covid on their last journey and those using taxis in past fortnight are more confident than those using longer ago.

Base: All used taxi in past year - 567



	TOTAL		Past fortnight	Past month	Past 6 months
NET (Safe)	90		92	94	87
NET (Unsafe)	3		1	1	6

Covid related measures: There are a lot of measures in place. These findings are very similar to safety measures available in February.

Base: All used taxi during Covid - 389

	%	Feb '21	REGION: Dublin	REGION: Rest of Leinster	REGION: Munster	REGION: Conn/ Ulster
		373	145	80	93	71
		%	%	%	%	%
The operator wore a face covering	76	82	75	66	86	78
I was wearing a face covering before I entered the taxi	64	73	60	54	75	67
A dividing screen had been installed	59	63	71	49	61	39
Driver requested for the use of rear seats only (i.e. not allowed to sit on front seat)	41	44	40	36	45	42
Windows were open to increase air circulation	39	34	33	38	56	25
Cashless payment was available through APP	37	40	52	28	28	26
There were obvious sanitisation efforts by the operator	34	30	30	31	38	40
Cashless payment was available through a credit/debit terminal	19	21	16	18	22	24
Driver specifically asked me/us to wear a face covering	10	10	9	15	10	8
Driver requested a maximum number of people per row /social distancing across all seats available	2	2	-	-	5	3
Driver requested details for the purpose of contact tracing	1	1	2	-	1	2
Other	1	1	1	2	-	4
Any Cashless	49	54	**63**	40	45	38

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

Covid related measures: There are a lot of measures in place. Some minor differences over time

Base: All used taxi during Covid - 389

	%	Taxi Usage in.. Past fortnight	Past month	Past 6 months
		146	78	165
		%	%	%
The operator wore a face covering	76	74	79	78
I was wearing a face covering before I entered the taxi	64	63	60	66
A dividing screen had been installed	59	53	59	64
Driver requested for the use of rear seats only (i.e. not allowed to sit on front seat)	41	36	**44**	**43**
Windows were open to increase air circulation	39	39	**43**	36
Cashless payment was available through APP	37	37	38	36
There were obvious sanitisation efforts by the operator	34	31	**40**	34
Cashless payment was available through a credit/debit terminal	19	14	**25**	21
Driver specifically asked me/us to wear a face covering	10	7	11	12
Driver requested a maximum number of people per row /social distancing across all seats available	2	1	3	2
Driver requested details for the purpose of contact tracing	1	2	1	0
Other	1	1	-	2
Any Cashless	49	**48**	**57**	**47**

Aspect that would make passengers feel safer

Base: All feeling fairly safe/unsure/unsafe - 315

		MOST RECENT TAXI USAGE			Feb 21
		Past fortnight	Past month	Past 6 months	Fairly safe - Unsafe
		69	*54*	*97*	*320*
	%	*%*	*%*	*%*	%
Windows were open to increase air circulation	**34**	30	37	36	38
A dividing screen had been installed	**32**	29	19	29	44
There were obvious sanitisation efforts by the operator	**32**	**36**	**36**	27	40
The operator wore a face covering	**30**	23	28	**34**	45
Cashless payment through a debit/credit terminal	**25**	27	23	19	23
Cashless payment was available through an app	**24**	21	23	24	28
Driver requested for the use of rear seats only (ie not allowed to sit on front seat)	**20**	15	30	17	28
Driver specifically asked me/us to wear a face covering	**15**	12	20	12	25
Driver requested details for the purpose of contact tracing	**4**	3	5	6	4
Driver requested a maximum number of people per row /social distancing across all seats available	**1**	2	2	1	2
Other	**8**	7	4	6	8
Any Cashless	**39**	**41**	37	34	41

Some difference in perception by demographics.

Base: All feeling fairly safe/unsure/unsafe - 315

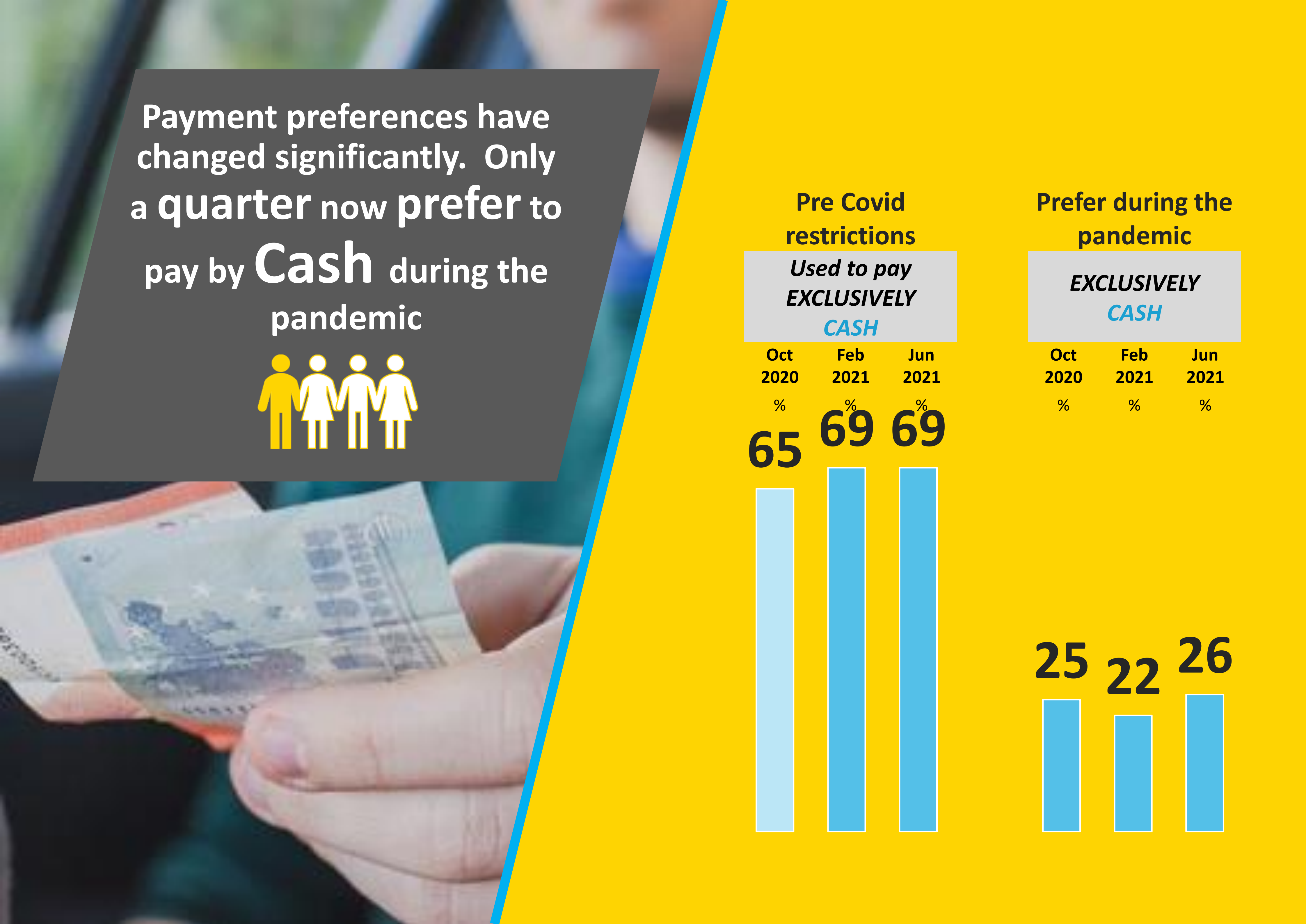
Higher than average

Lower than average

	Total	Gender		Age					Region			
		Male	Female	18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Conn/ Uls
Base (unweighted):	*315*	*166*	*149*	*64*	*76*	*97*	*43*	*35*	*112*	*78*	*64*	61
	%	%	%	%	%	%	%	%	%	%	%	%
Windows were open to increase air circulation	34	33	34	26	36	35	38	34	42	27	25	36
A dividing screen had been installed	32	30	33	11	32	33	36	57	33	23	34	38
There were obvious sanitisation efforts by the operator	32	30	34	22	37	32	38	32	39	18	39	29
The operator wore a face covering	30	30	30	28	38	30	25	25	35	29	22	30
Cashless payment through a debit/credit terminal	25	25	25	31	24	17	29	31	27	23	25	24
Cashless payment was available through an app	24	26	21	14	35	26	18	21	27	18	23	26
Driver requested for the use of rear seats only (ie not allowed to sit on front seat)	20	19	21	21	23	20	15	20	23	21	15	20
Driver specifically asked me/us to wear a face covering	15	13	17	12	15	12	24	18	15	13	17	15
Driver requested details for the purpose of contact tracing	4	4	5	1	1	5	8	9	5	1	5	7
Driver requested a maximum number of people per row /social distancing across all seats available	1	2	-	2	-	1	2	-	1	1	2	-
Other	7	7	7	2	6	11	10	5	9	7	9	1
Any CASHLESS app or terminal	39	41	36	39	**45**	34	37	**42**	41	33	42	38

May/June 2021

4. Attitudes to payments types


Payment preferences have changed significantly. Only a quarter now prefer to pay by Cash during the pandemic
Pre Covid restrictions
Used to pay EXCLUSIVELY CASH
Oct 2020
Feb 2021
Jun 2021
%
65
69
69
Prefer during the pandemic
EXCLUSIVELY CASH
Oct 2020
Feb 2021
Jun 2021
%
25
22
26

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

Base: All adults

	October 2020	February 2021	June 2021
Base (unweighted):	*1,026*	*1,015*	*1047*
	%	*%*	*%*
Cash exclusively/mainly	**65**	**69**	**69**
Mixture of card and cash	24	19	20
Card exclusively/mainly	10	5	6
Company account	-	3	3
Booking payment app	-	16	14

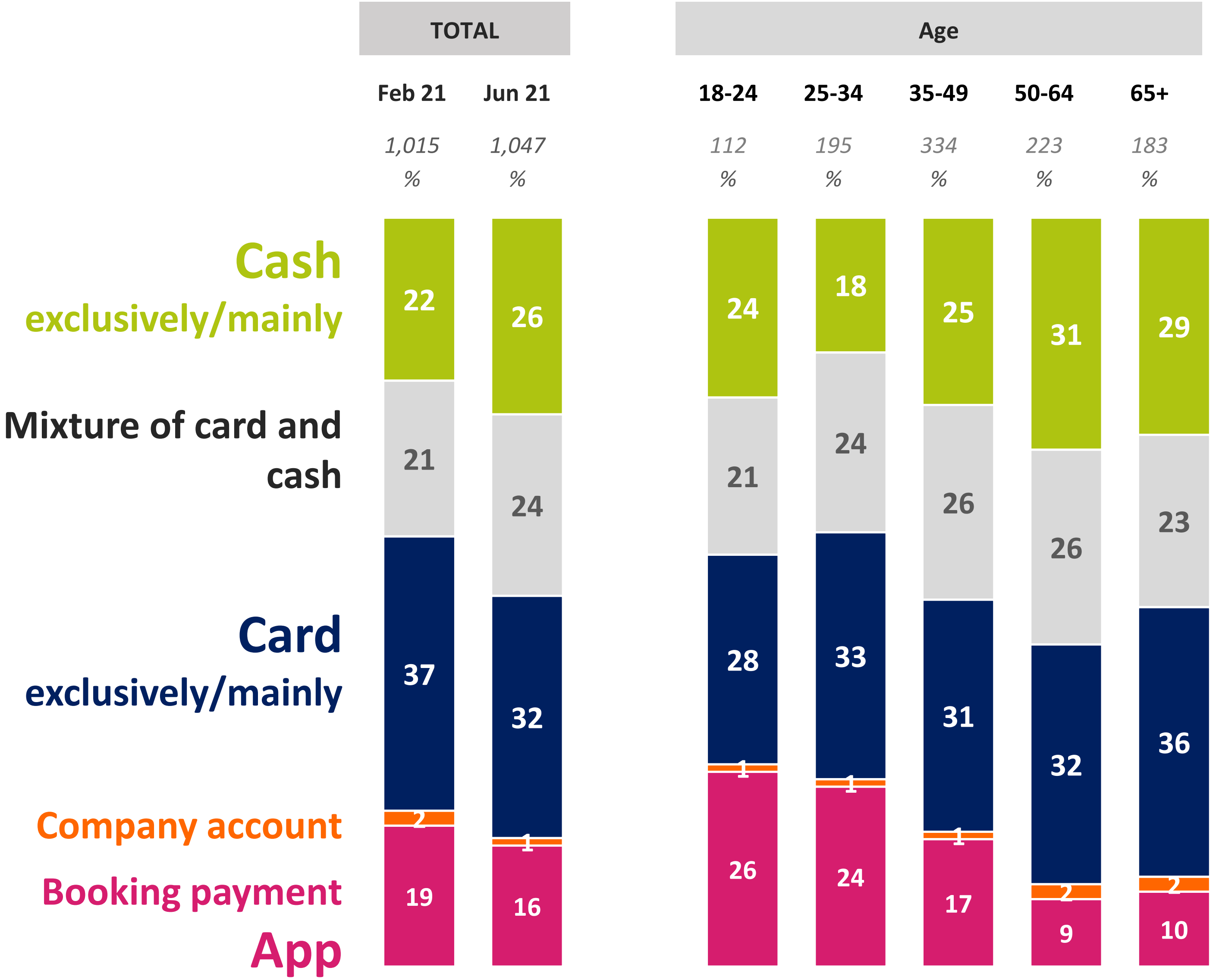
Payment methods used most often pre Covid:

Base: All adults

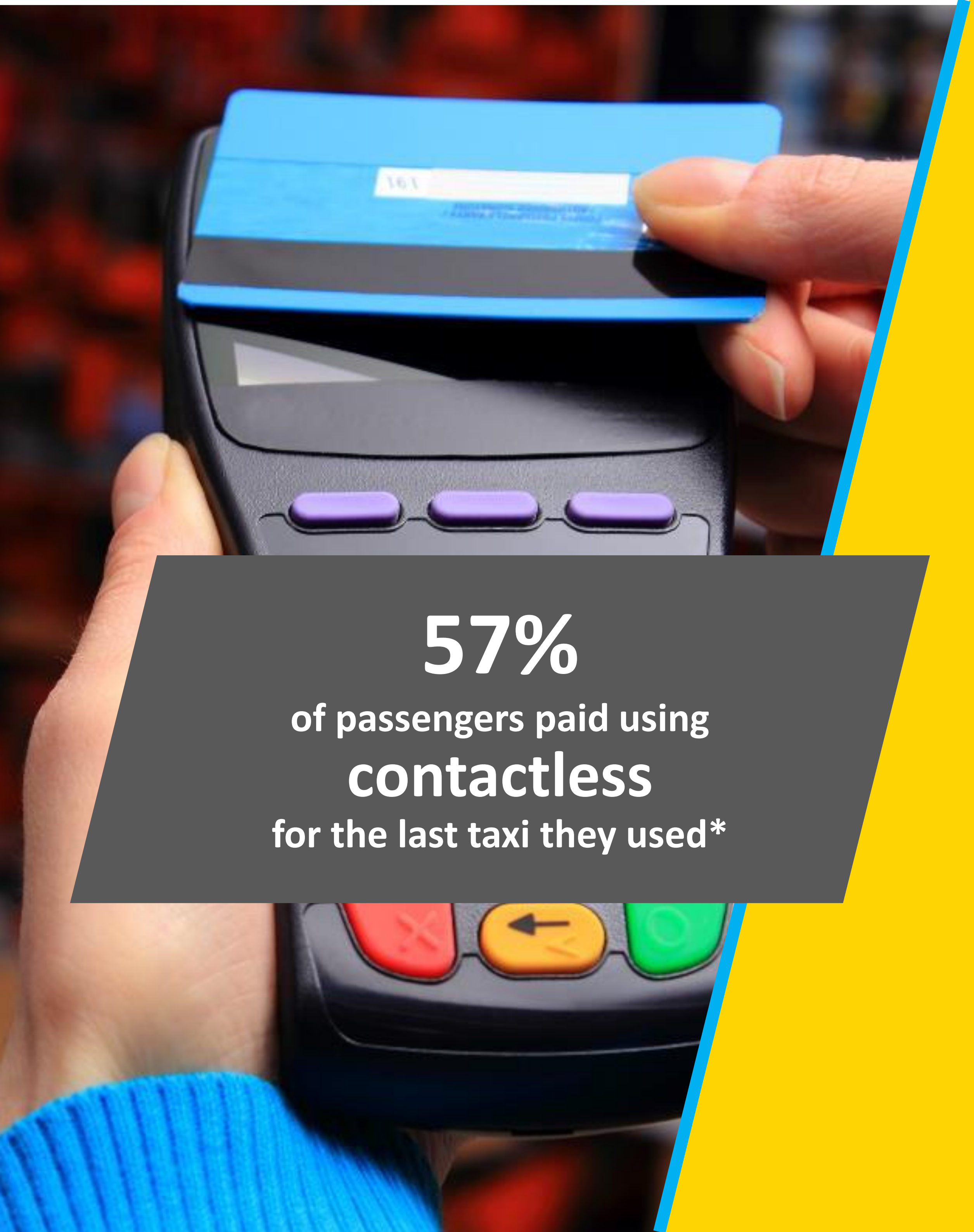
	Feb 2021	June 2021	Age					Region			
			18-24	25-34	35-49	50-64	65+	Dublin	RoL	Munster	Conn/ Uls
	1015	*1047*	*112*	*195*	*334*	*223*	*183*	*302*	*276*	*263*	*206*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Cash exclusively/mainly	65	65	36	57	64	74	81	51	67	72	78
Mixture of card and cash	15	16	26	17	18	14	11	20	16	15	13
Card exclusively/mainly	5	7	20	5	6	6	3	7	8	7	4
Company account	2	1	2	1	1	1	0	2	1	0	0
Booking payment App	13	10	16	19	12	4	5	20	7	7	5

Payment preferences during pandemic: 49% of respondents use cashless payment when paying for their taxi journeys with 73% using some form of cashless payment.

Base: All adults, 1057



May/June 2021

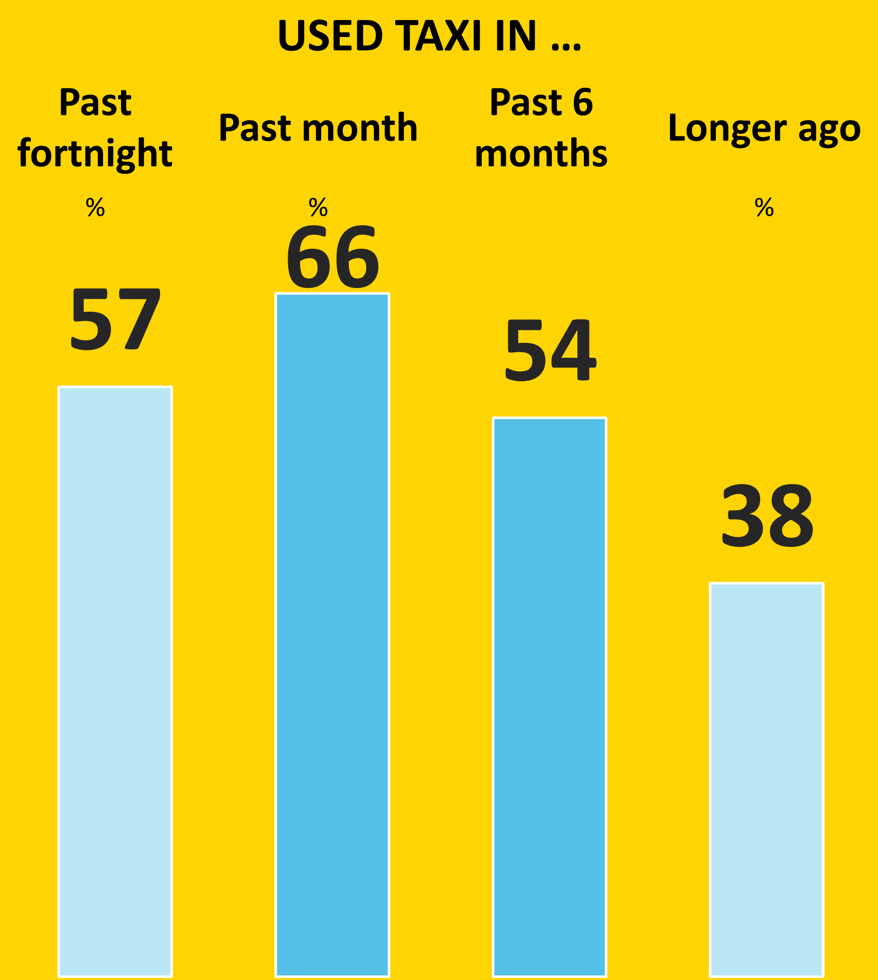


57%

of passengers paid using

contactless

for the last taxi they used*



** Used in past fortnight*

Recent payment methods: Very little difference from last measure among recent taxi users.

Base: All used taxi in past year - 567

	NET taxi usage (Past Fortnight)	
	Feb '21	**June '21**
Base (unweighted):	*79*	*146*
	%	*%*
Any contactless:	**57**	**57**
The app that I used to order the taxi	29	30
Tapped a card (no contact)	17	18
Tapped mobile to pay through Googlepay, Applepay etc	1	4
Company Account	10	5
Any contact:	**43**	**43**
By cash	43	41
Used chip and pin to pay by card	-	1
Other	-	1

Recent payment methods: Cashless payment is more popular in Dublin and when pre-ordered through an app.

Base: All used taxi in past year - 567

	Total	Region				Acquired Taxi by				Safety on last journey	
		Dublin	RoL	Munster	Conn/ Uls	Hailed it	Picked up at a rank	Ordered it by phone (spoke to some-one)	Ordered it using an app	Safe	Not Sure/ Unsafe
Base (unweighted):	*567*	86	132	184	86	61	95	213	181	505	17
	%	%	%	%	%	%	%	%	%	%	%
Any contactless:	**52**	**64**	**44**	**50**	**37**	**53**	**40**	**33**	**79**	**52**	**47**
The app that I used to order the taxi	26	39	14	25	14	14	9	8	**64**	27	19
Tapped a card (no contact)	18	16	17	21	16	25	24	19	9	18	6
Tapped mobile to pay through Googlepay, Applepay etc	4	3	10	1	4	8	4	3	3	4	5
Company Account	4	6	3	3	3	6	3	3	3	3	17
Any contact:	**48**	**36**	**57**	**51**	**63**	**47**	**61**	**67**	**21**	**49**	**53**
By cash	46	34	52	48	63	47	60	63	18	46	47
Used chip and pin to pay by card	2	2	5	1	-	-	1	3	2	2	6
Other	1	0	-	2	-	-	-	1	1	1	-

Payment preferences: Younger adults more likely prefer contactless payments

Base: All used taxi in past year - 567

	Total	Gender		Age				
		Male	Female	18-24	25-34	35-49	50-64	65+
Base (unweighted):	*567*	*301*	*266*	*86*	*132*	*184*	*86*	*79*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Any contactless:	**63**	**66**	**59**	**68**	**73**	**63**	**51**	**52**
The app that I used to order the taxi	27	29	25	33	42	29	13	11
Tapped a card (no contact)	28	28	28	26	23	26	33	33
Tapped mobile to pay through Googlepay, Applepay etc	5	6	4	3	7	5	3	7
Company Account	3	3	2	6	1	3	2	1
Any contact:	**38**	**34**	**41**	**32**	**26**	**37**	**49**	**47**
By cash	36	32	40	32	24	36	48	42
Used chip and pin to pay by card	2	2	1	-	2	1	1	5

Preferred payment method is heavily led by contactless.

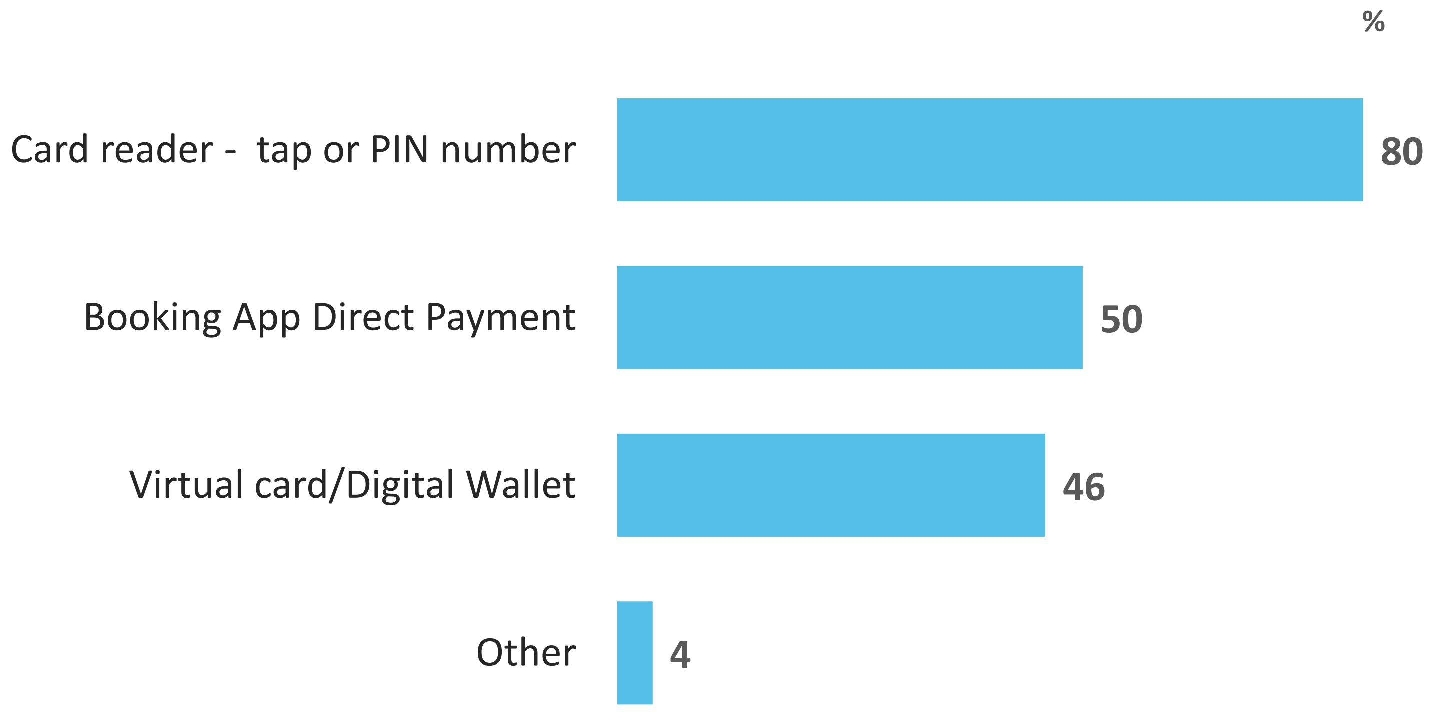
Base: All used taxi in past year - 567

	Total	Region				Taxi Usage				Acquired 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:	**63**	**76**	**55**	**56**	**50**	**65**	**71**	**62**	**58**	**63**	**56**	**46**	**84**
The app that I used to order the taxi	27	39	17	25	18	32	25	28	23	18	13	10	61
Tapped a card (no contact)	28	28	30	25	28	27	35	26	27	32	30	31	18
Tapped mobile to pay through Googlepay, Applepay etc	5	6	5	4	3	4	3	6	6	10	10	3	2
Company Account	3	3	3	2	1	2	8	2	2	3	3	2	3
Any contact:	**38**	**23**	**45**	**44**	**49**	**36**	**29**	**39**	**42**	**38**	**45**	**53**	**16**
By cash	36	22	41	43	47	35	27	36	40	34	42	51	15
Used chip and pin to pay by card	2	1	4	1	2	1	2	3	2	4	3	2	1

Payment methods that should be available in addition to cash:

There is widespread interest in having access to card payments in all taxis.

Base: All adults 1047



	Oct 2020 %	Feb 2021 %
Card reader - tap or PIN number	86	79
Booking App Direct Payment	43	54
Virtual card/Digital Wallet	50	49
Other	3	3

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.

Base: All adults 1047

	Total	Age					Region			
		18-24	25-34	35-49	50-64	65+	Dublin	RoL	Mun-ster	Conn/ Uls
Base (unweighted):	*1047*	*112*	*195*	*334*	*223*	*183*	*302*	*276*	*263*	*206*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Payment by card through the use of a terminal available in taxi	80	78	75	79	82	**85**	81	80	81	78
Payment through a payment app	50	48	**61**	**54**	47	36	56	44	54	42
Payment by a virtual card/wallet through phone app (Googlepay, Applepay)	46	**56**	**53**	49	44	29	48	44	50	36

5. Key findings

Key Findings

NTA
Údarás Náisiúnta Iompair
National Transport Authority

Taxi usage

- **Only 5%** of adults use taxi services WEEKLY, which is similar to train and Luas/Dart (all 4%). Bus is higher @ 15% which is slightly higher than February (12%) but still lower than October reported usage norms (18%).

64% of taxi users are using services less frequently than pre Covid (down from 78% in Feb but closer to 66% in Oct).

- Encouragingly, over the next month, the public are projecting a doubling in size of the Public Transport user base.
- Compared with pre Covid, the indicators suggests that consumer estimates have improved to -45% vs. -73% in February in terms of number of journeys.

Covid Safety Measures

SAFETY FIRST

- Importantly, **90%** of taxi users during Covid **felt safe** from **Covid,** which remains unchanged from the last wave (Feb).
- Taxi customers have witnessed a lot of safety measures in place including the use of face coverings and dividing screens between the driver and passenger (59%). Using a cashless system to pay also evident (49% although down from 54%).
- Cashless options and screen dividers more evident in Dublin 63% and 71% respectively.

Looking ahead

- There is evidence of a modest increase in the number of regular taxi users (71% vs. 69% in Feb) but a more substantial shift in passenger journey estimates (was at -73% vs pre Covid now at -45%)
- Projected usage even in 2-3 months time is higher than predicted in October/February and when compared with other forms of Public Transport. As such, **recovery for taxi demand seems imminent.**
- Highlighting the fact that recent **users felt safe**, the **convenience of apps** as well as other **safety measures** implemented (windows open, dividers and obvious signs of sanitation) for the industry must be important to continue to hold trust. The main purpose of taxi usage currently is for **work, visiting friends & family and leisure.**

Key usage changes

- Among current taxi users, there has been a definite **shift towards ordering the taxi by phone, but an evident decrease this wave in ordering through an app (28% vs 38% in February)**.
- Journeys now seems **slightly longer** compared with October/February estimates.
- Day of week usage is still slightly broadly based across the week with Saturday now the most popular (25% of all journeys (share of all) vs. 9% in Feb).
- **There is slightly less usage throughout the afternoon** and more usage in the morning and evening compared to February estimates.
- The **role for taxi usage** now driven by three main purposes – **work, visiting friends & family and leisure.**

Payment options

- **57%** of those using taxi services in past fortnight used contactless for payment which is similar levels to what we saw in February.
- Contactless remains higher in Dublin and those ordering from Booking App.
- Use of case as a payment method more popular outside Dublin: Connacht/Ulster (63%) and the rest of Leinster (57%), and particularly for telephone ordering (63%), rank usage (60%) and hailing (47%)
- Contactless users remain more male and younger.

79% of taxi users believe that all taxis should have some form of contactless payment option available (78% in Feb).

Building trust

- For those who are not feeling as Covid safe with taxi usage, the priorities in order are :-
  - Windows open to increase air circulation (if possible) (34%)
  - Dividing screens (32%)
  - Obvious signs of sanitation of the vehicle (32%)
  - Driver wears a face covering (30%)

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.

NTA

Údarás Náisiúnta Iompair
National Transport Authority