

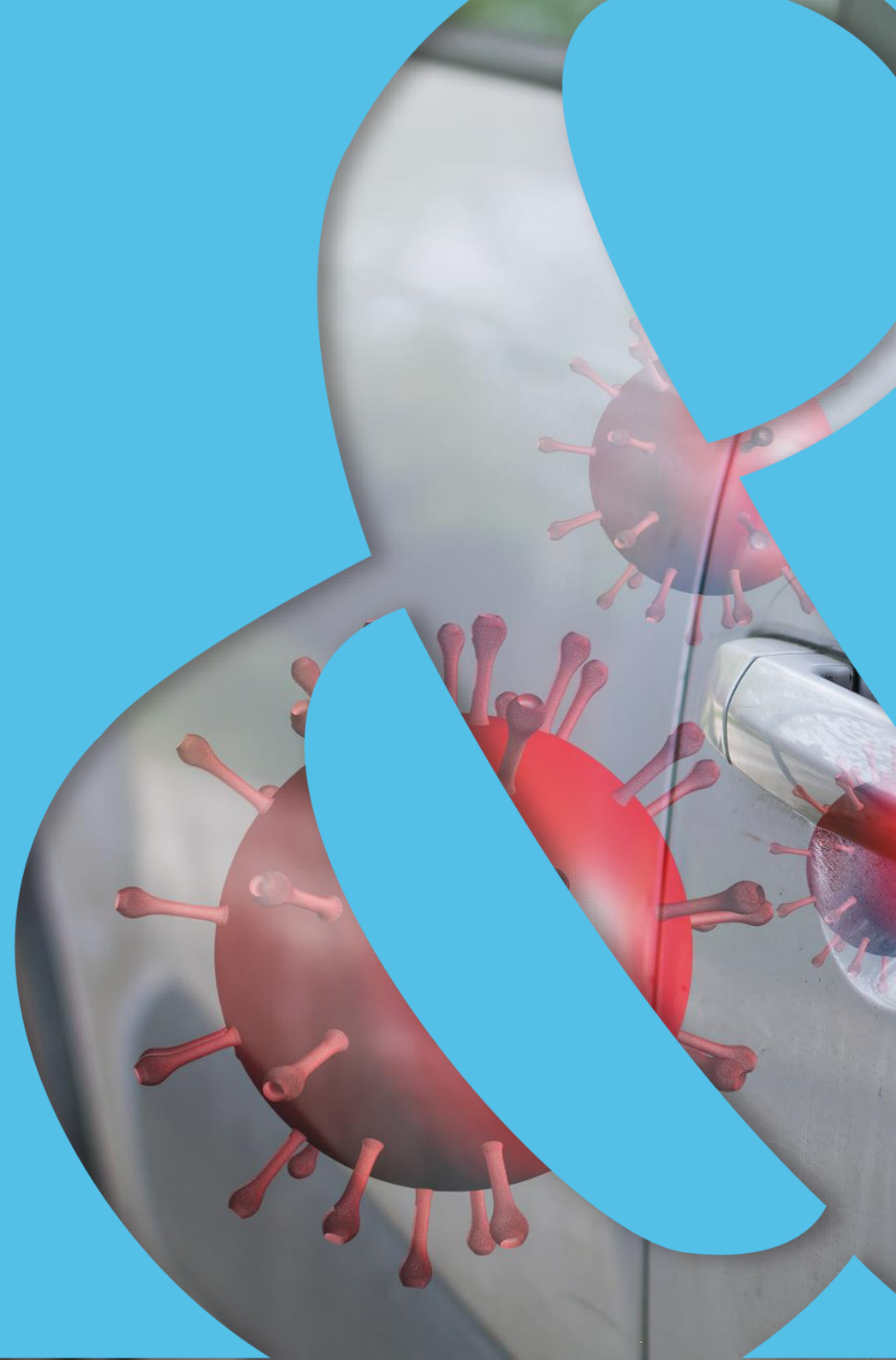


Údarás Náisiúnta Iompair
National Transport Authority

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

Quantitative Survey
March 2021

Data gathered during Level 5
Government Restrictions





Introduction

Introduction

- This report details the findings of a representative survey of taxi drivers in Ireland.
- This is the second iteration of this study, and was, as previously, undertaken by telephone, with a randomly selected list of drivers provided by the NTA for interview.
- A survey of taxi consumers has been undertaken online in tandem, covering a similar topic and aimed at understanding the impact COVID has had on taxi usage and attitudes towards the safety of using taxis during the COVID pandemic.
- Where possible, findings have been compared with that of the previous wave, and indeed with a previous survey of taxi drivers conducted by B&A in July 2019 (NTA Taxi Fare Review 2019).



Objectives

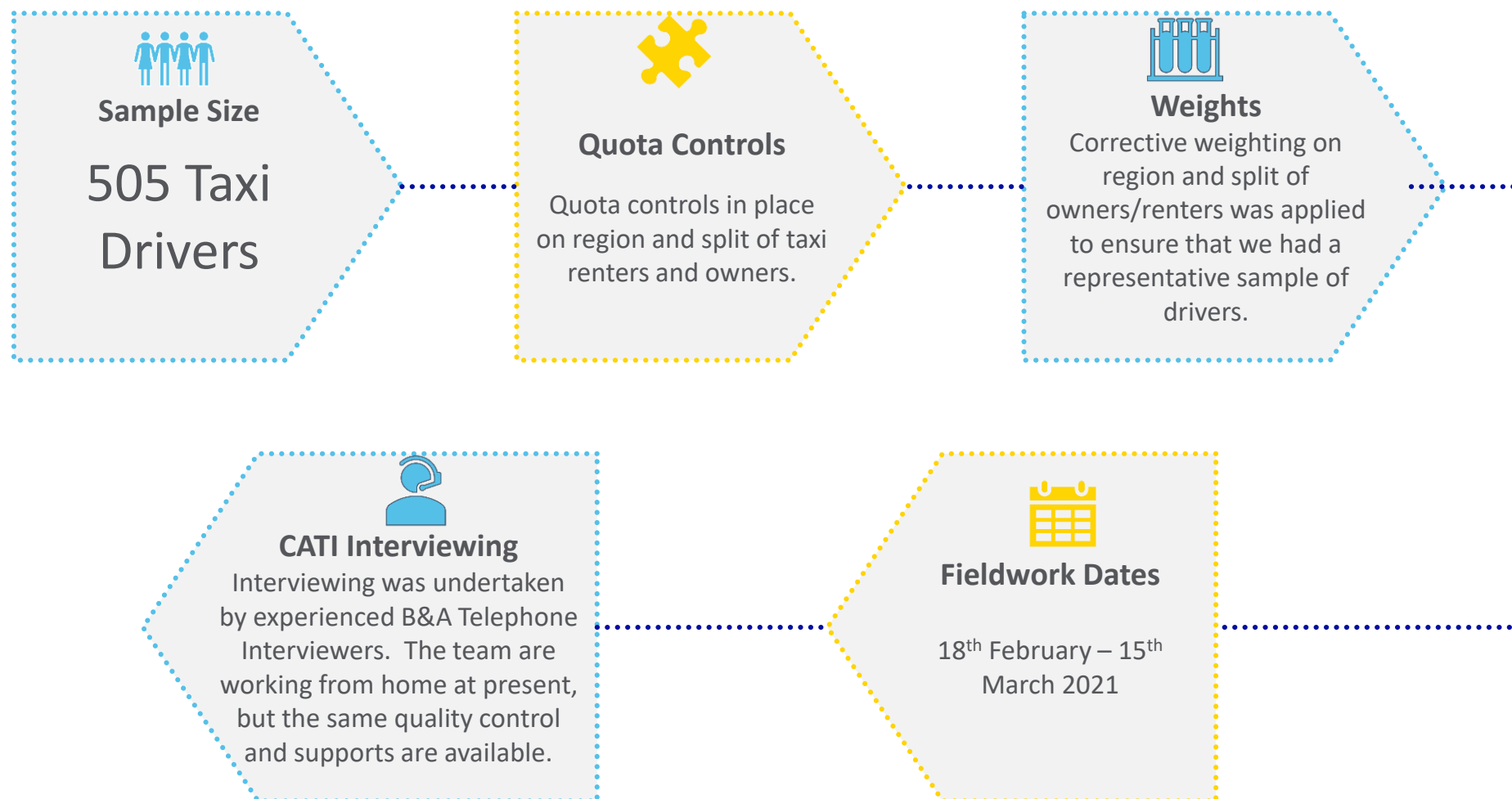
- This research aimed to understand:
 - ❖ The impact COVID is having on taxi drivers
 - ❖ The COVID safety measures drivers have introduced in their vehicles
 - ❖ Incidence of and openness to the use of cashless payments in taxis
- The core objective of this survey was to answer the question below:

What impact has COVID-19 had on taxi drivers and the future of the industry and how has the situation changed since our previous survey in Sept 2020?



Methodology

A representative survey of taxi drivers in Ireland.



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

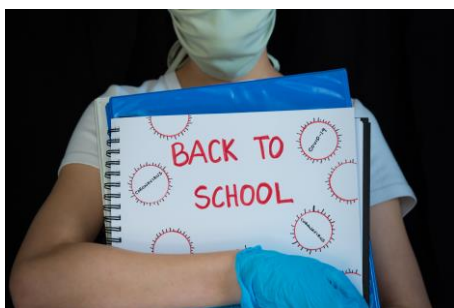
Government's roadmap to reopening the country is underway: shopping centres & restaurants reopen under strict guidelines. Also in this month, we have a new Government.

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.



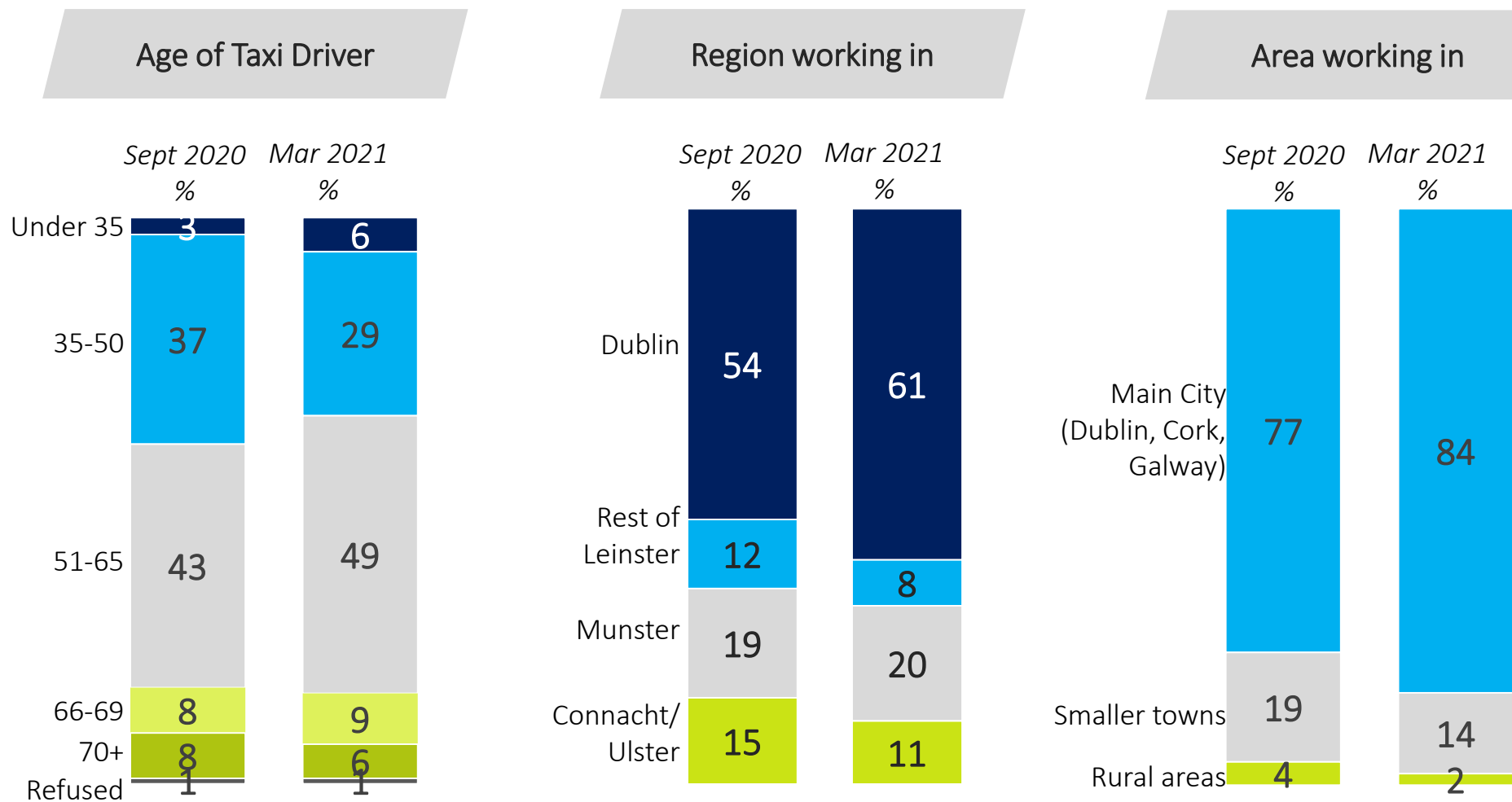
Jan – Mar 2021

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.



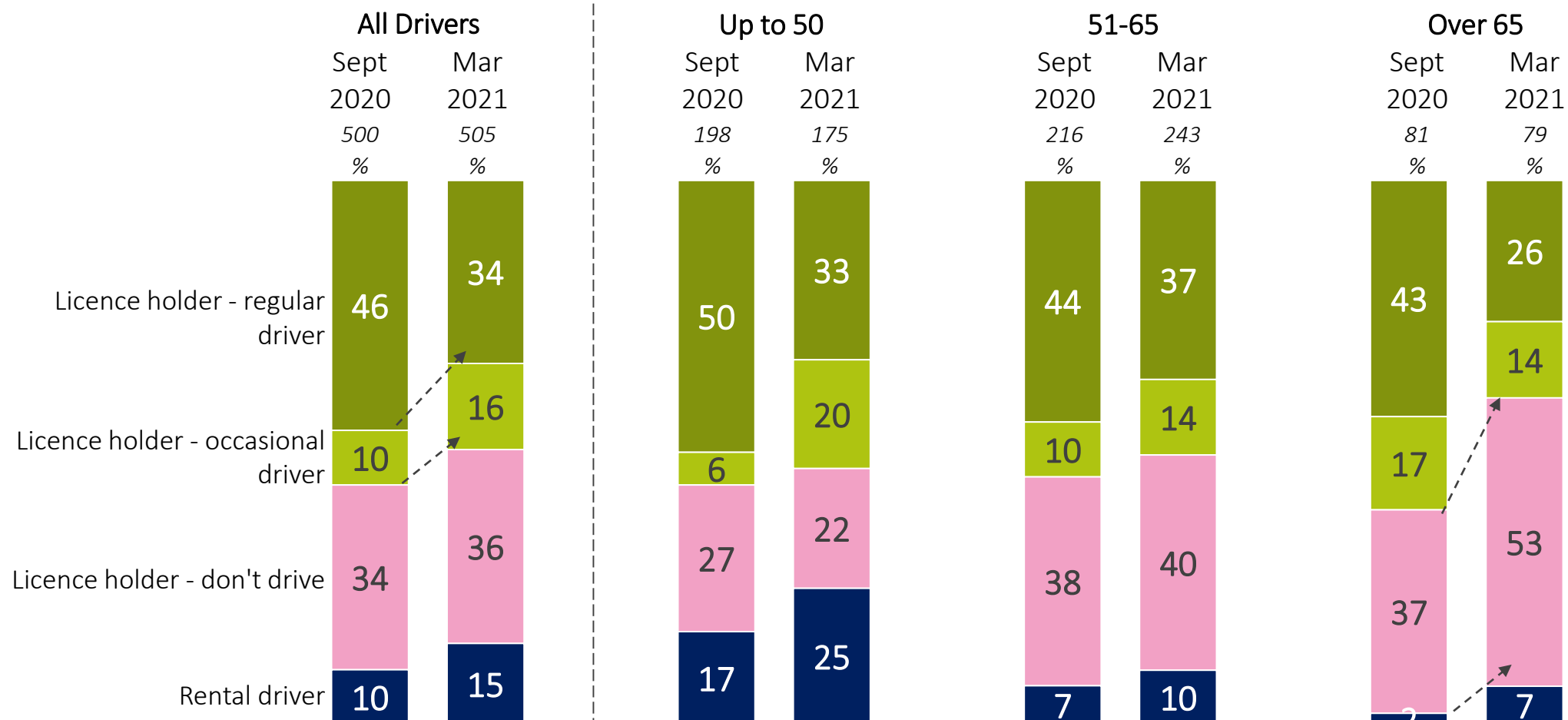
Profile of Sample

Profile of taxi drivers interviewed



Similar age profile of taxi drivers interviewed, while marginally higher proportion working in main cities than was found in the previous wave.

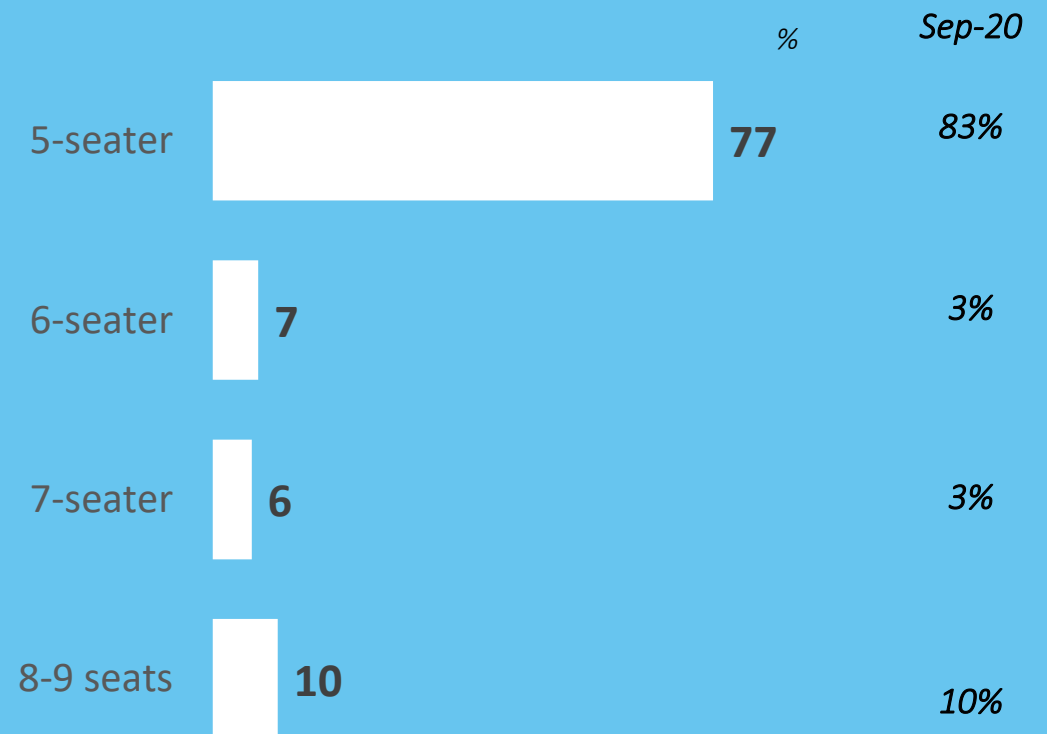
Status of employment



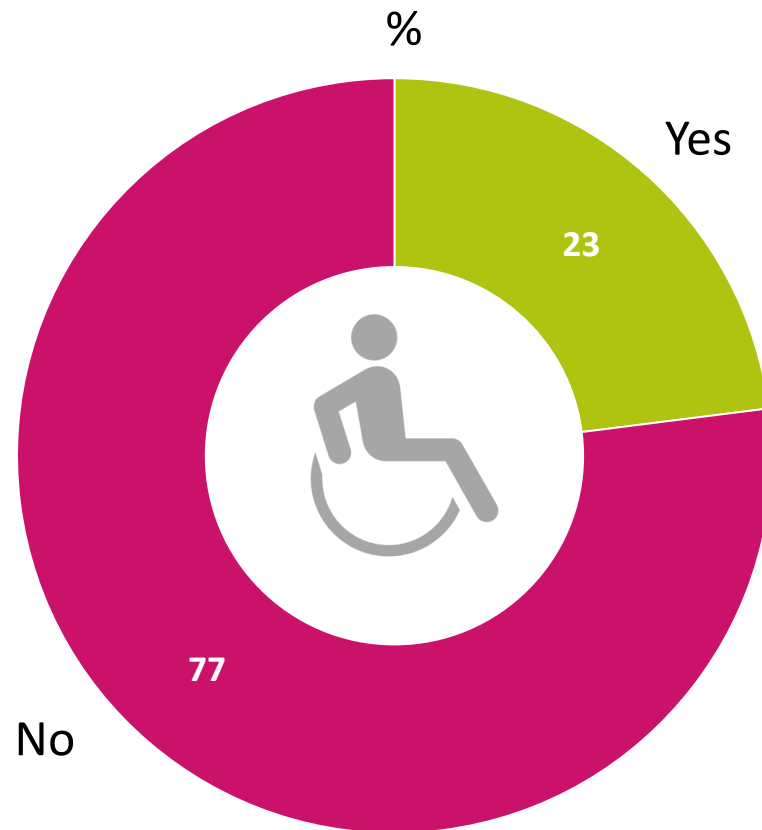
Proportion of over 65s who are licence holders but don't drive has grown from 37% to 53% this wave. Higher proportion of under 50s indicate they are rental drivers this time, while we have seen a shift overall from regular to occasional work.



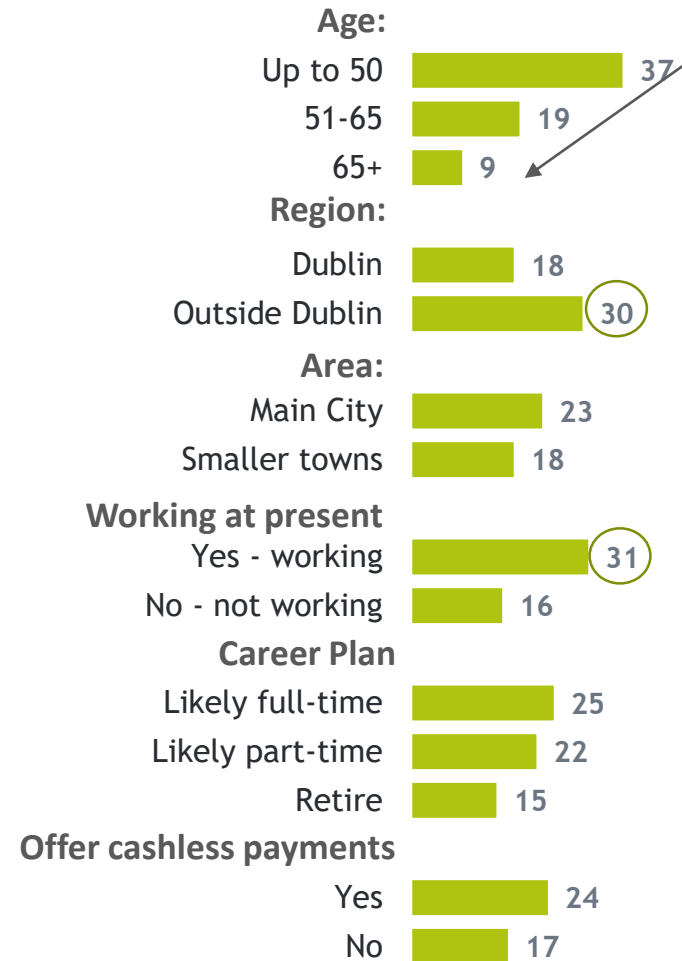
More than three quarters (77%) operating a 5-seater vehicle.



Wheelchair Accessible



Any Yes %



As we have seen previously, incidence of operating a wheelchair accessible taxi declines with age. WATs more commonly found in outside Dublin, while those driving them are more likely to be working at present.

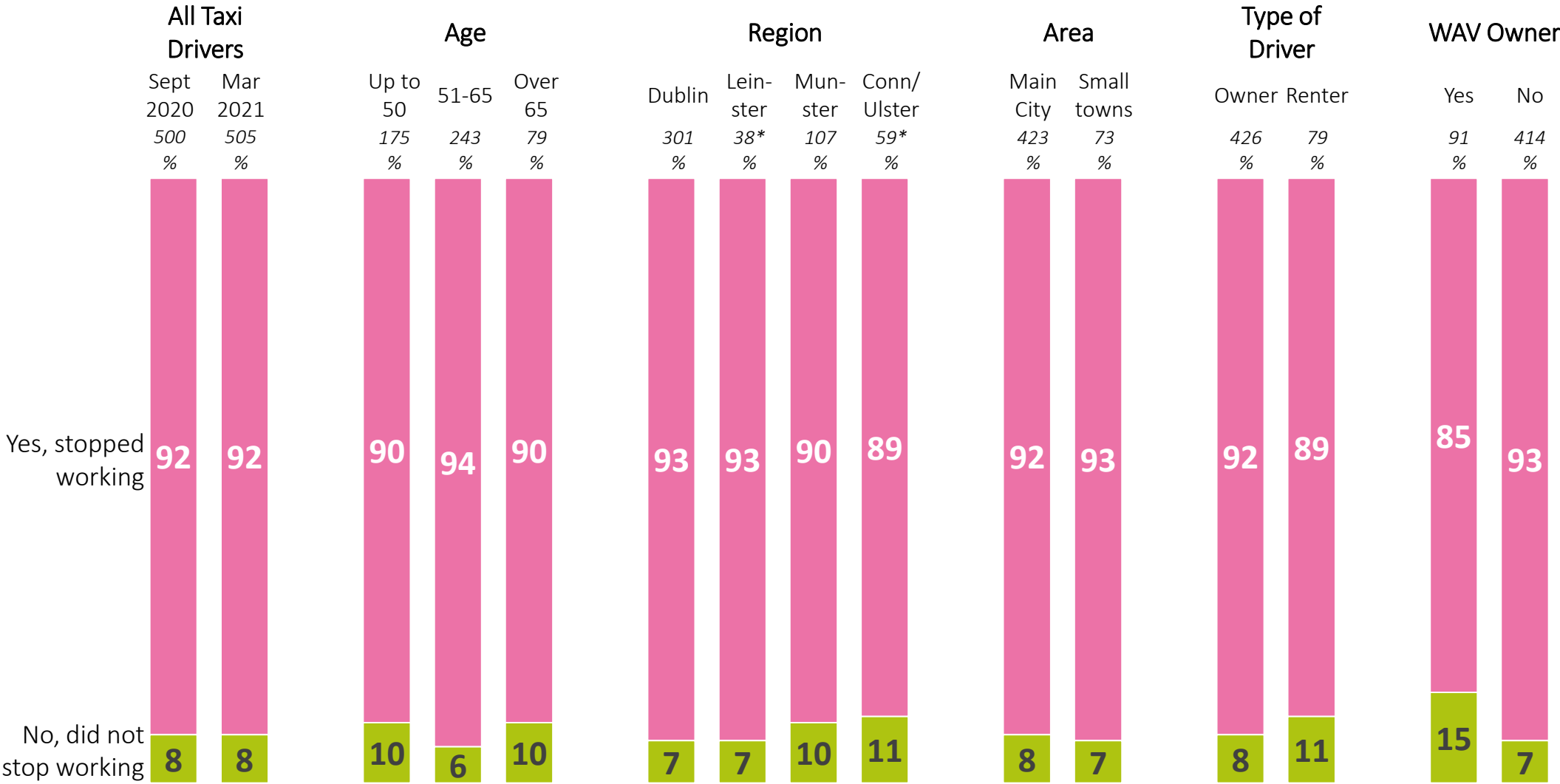


**Impact of COVID-19
on income**



Overall, the vast majority of taxi drivers (92%) have stopped working at some point since the COVID restrictions were introduced, with little difference by age, region, area or type of driver. It can be said, however, that those driving a WAV (85%) were less inclined to have stopped working than non-WAV drivers (93%).

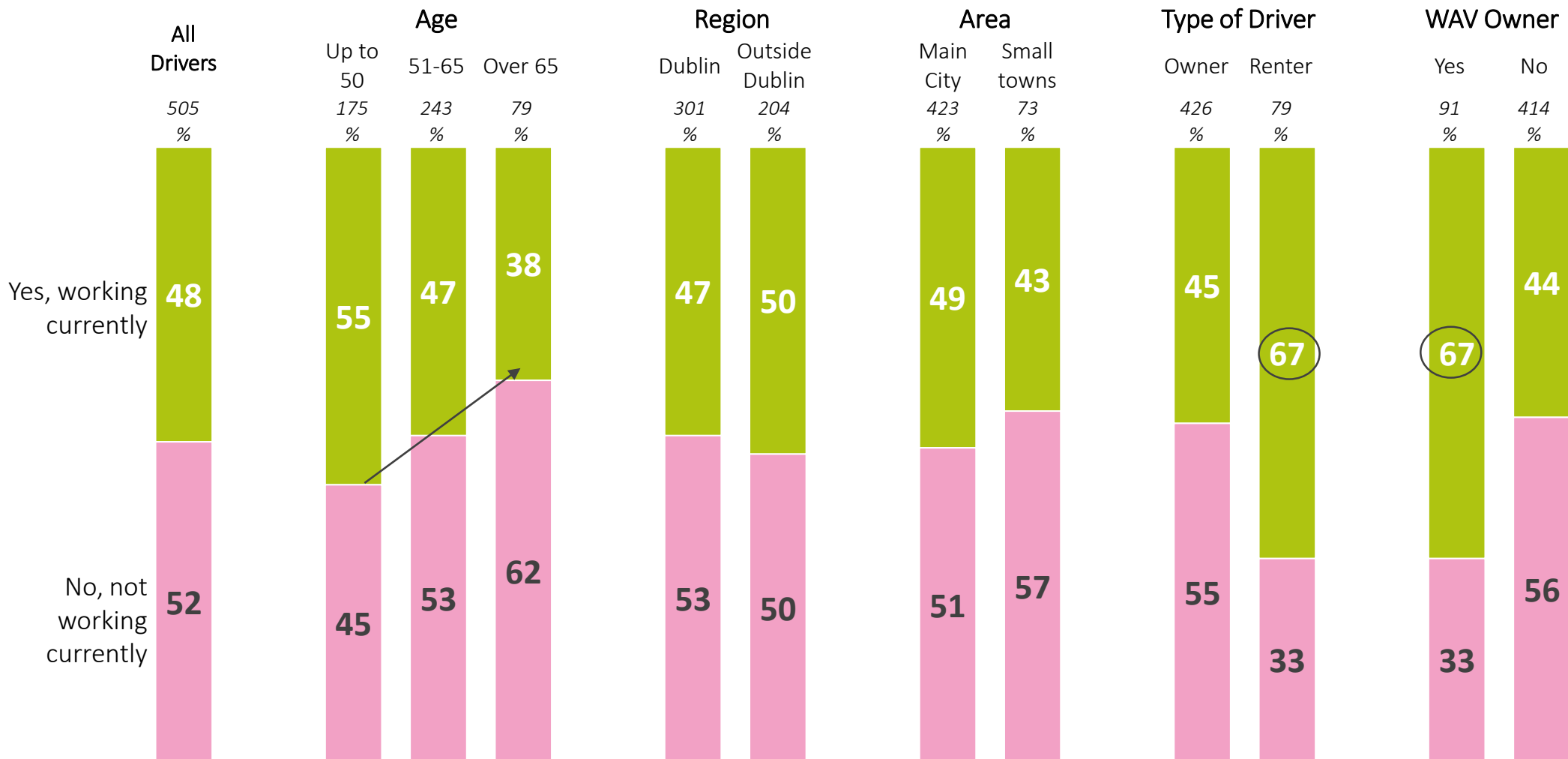
Incidence of stopping work due to pandemic



Overall, the vast majority have stopped working at some point since the COVID restrictions were introduced, with little difference by age, region, area or type of driver. It can be said, however, that those driving a WAV were less inclined to have stopped working than non-WAV drivers.

**Caution: small base*

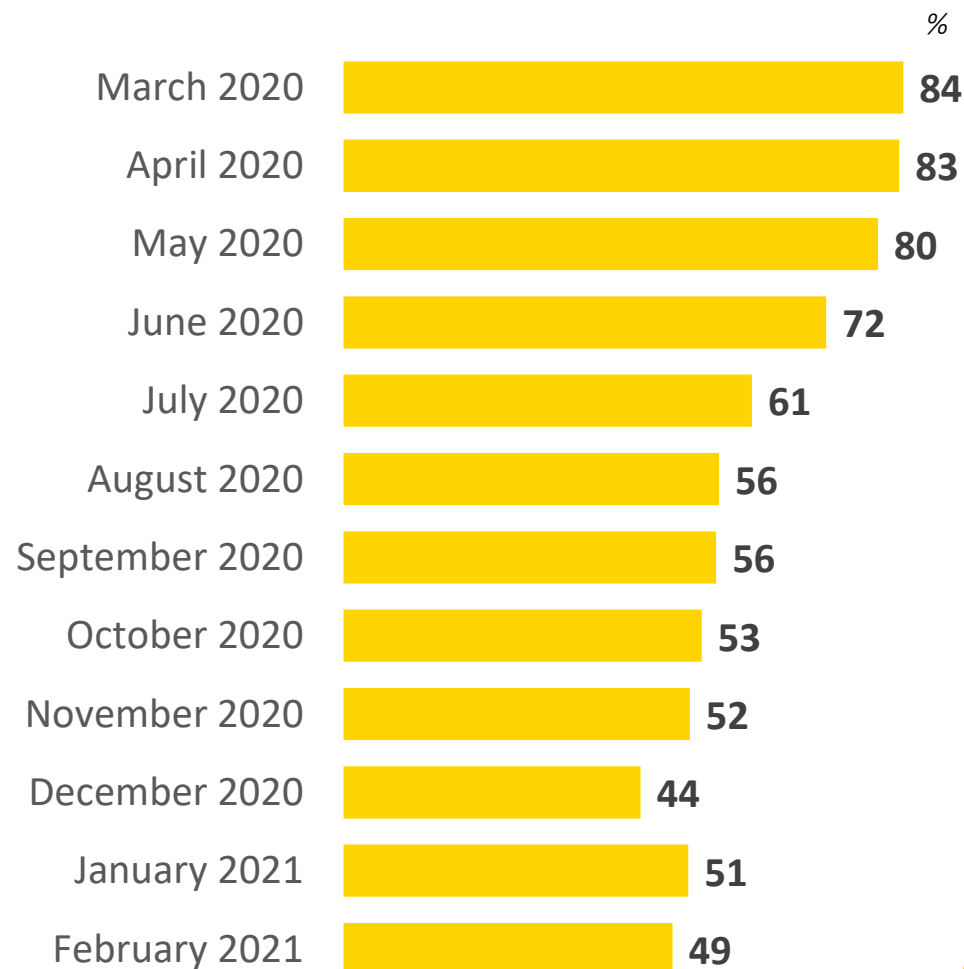
Who is working currently?



Just over half of taxi drivers are not working at present. Younger drivers more likely to be working (with incidence declining with age), while those renting their vehicle and those driving WAV taxis are more inclined than others to be working currently. Those in smaller towns marginally less likely to be working, while little difference by region.

*Caution: small base

Months not working



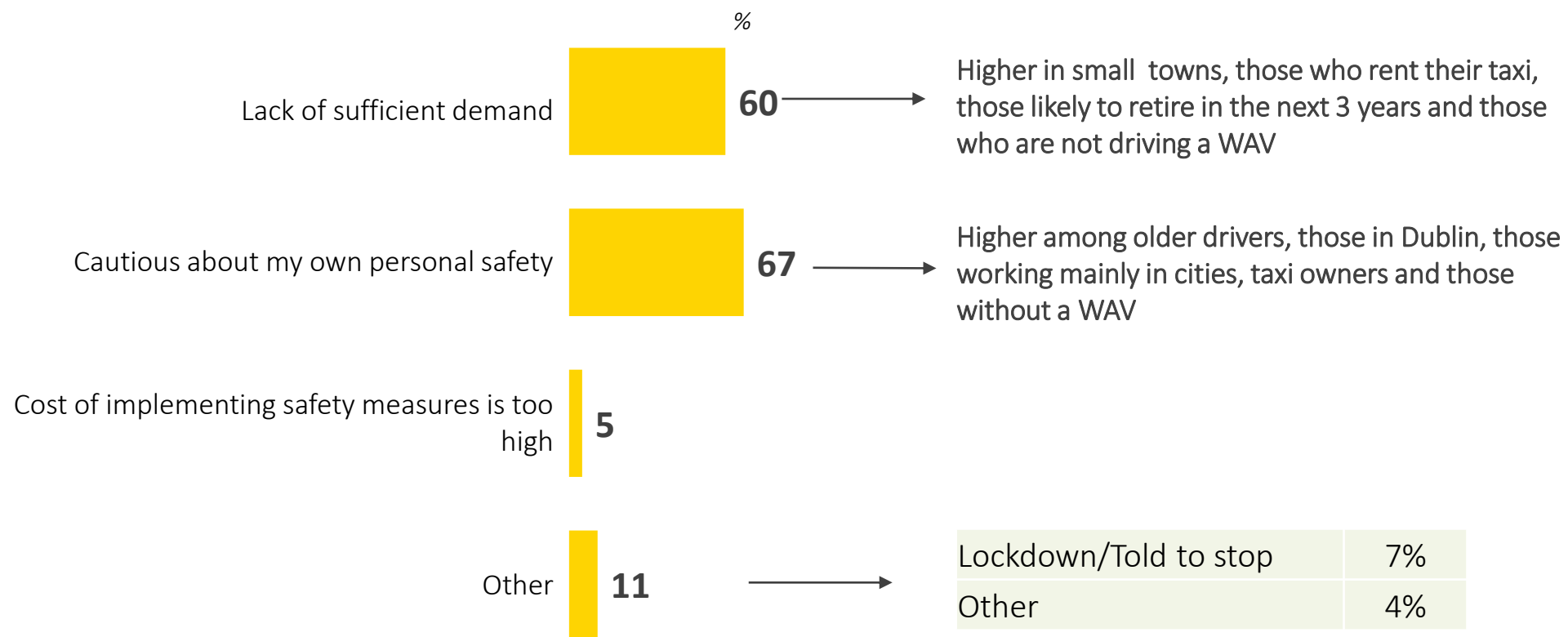
4 in 5 taxi drivers were not working in March, April or May, with a further 72% indicating they did not work in June. December was the busiest month in terms of drivers returning to work, but even then only 56% of them did so.

When those who stopped returned to work

	All Drivers	Age			Region		Area		Type of Driver		WAT?	
		Under 50	51-65	Over 65	Dublin	Outside Dublin	Mainly cities	Smaller towns	Owner	Renter	Yes	No
Base:	463	157	228	71	301	184	388	67	392	71	77	386
	%	%	%	%	%	%	%	%	%	%	%	%
March 2020	84	80	87	82	85	90	84	82	84	80	74	86
April 2020	83	83	84	81	84	89	84	76	84	78	77	84
May 2020	80	77	84	73	83	83	81	72	81	76	74	81
June 2020	72	66	77	71	73	78	73	68	74	62	65	74
July 2020	61	53	68	57	63	64	62	60	64	43	52	63
August 2020	56	45	63	57	60	55	56	56	60	34	42	59
September 2020	56	43	62	63	61	53	56	53	59	34	42	59
October 2020	53	43	59	59	60	49	54	56	57	34	37	57
November 2020	52	42	58	54	56	49	52	51	55	35	37	55
December 2020	44	31	51	52	46	46	45	46	47	28	36	46
January 2021	51	42	53	65	53	55	51	57	55	32	44	53
February 2021	49	38	52	65	50	53	49	51	53	28	36	52

Those aged 51-65, taxi owners and those driving a non-WAV taxi are more likely to have stopped working for a longer period of time than others. Those outside Dublin more inclined to have stopped at the beginning of the pandemic, whereas Dublin drivers more likely to have stopped in Autumn and Winter (which would tie in with harsher restrictions in Dublin at that time).

Why stopped working

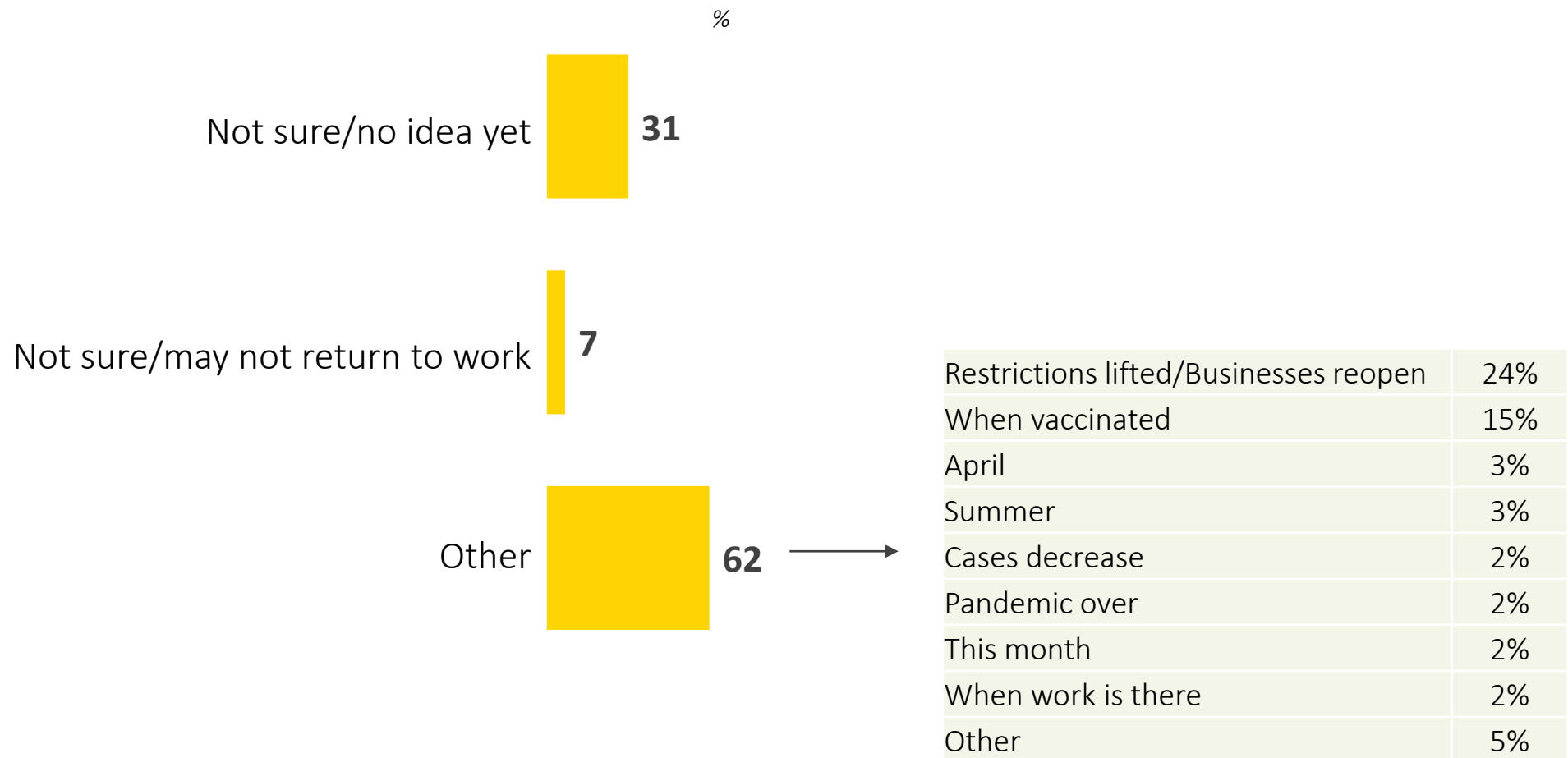


The majority of respondents who stopped working did so because of a lack of demand and/or caution for their own safety. Other mentions dominated by the pandemic in more general terms.



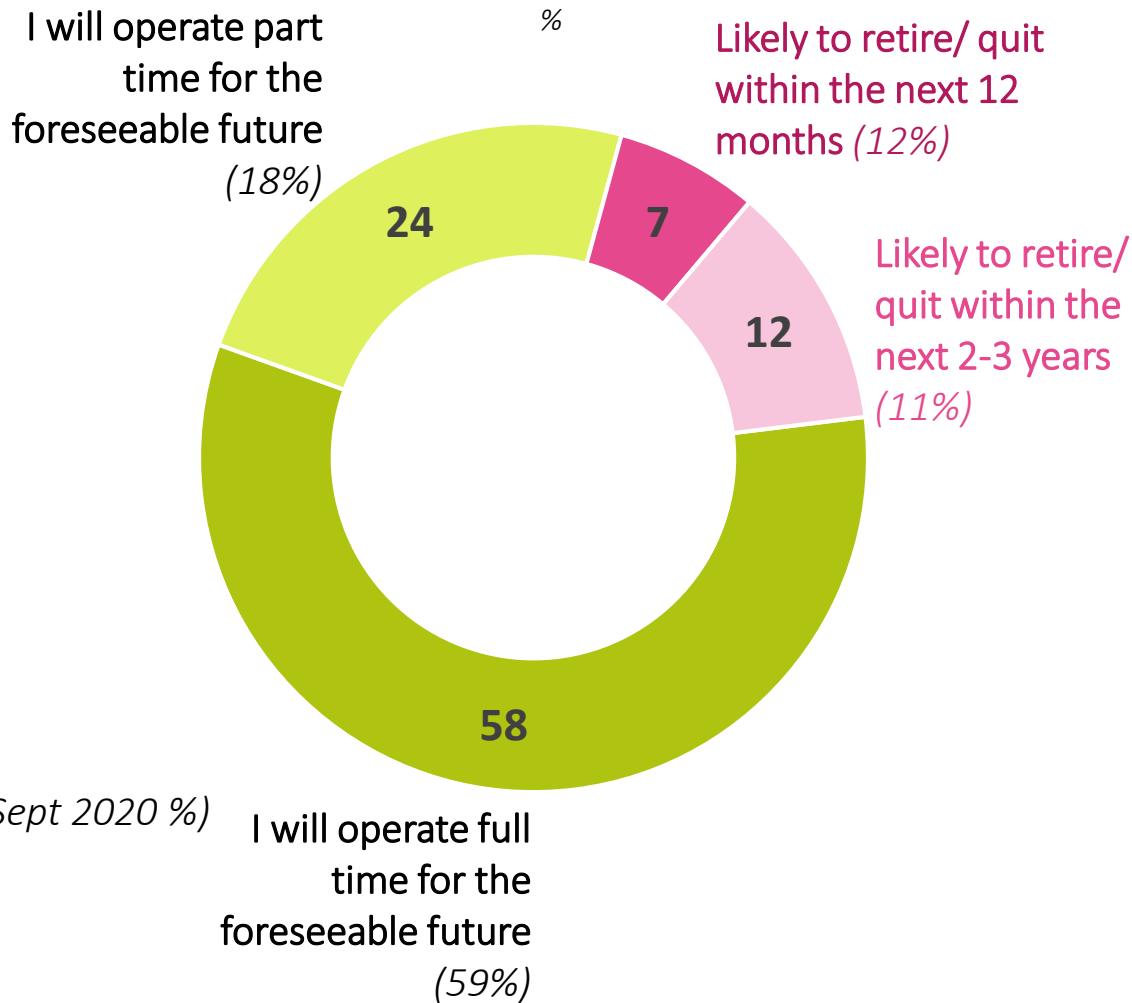
In September 2020,
60% of taxi drivers
had no idea when
they would be
going back to work,
however in March
2021 that figure is
down to 31%.

When plan on returning to work

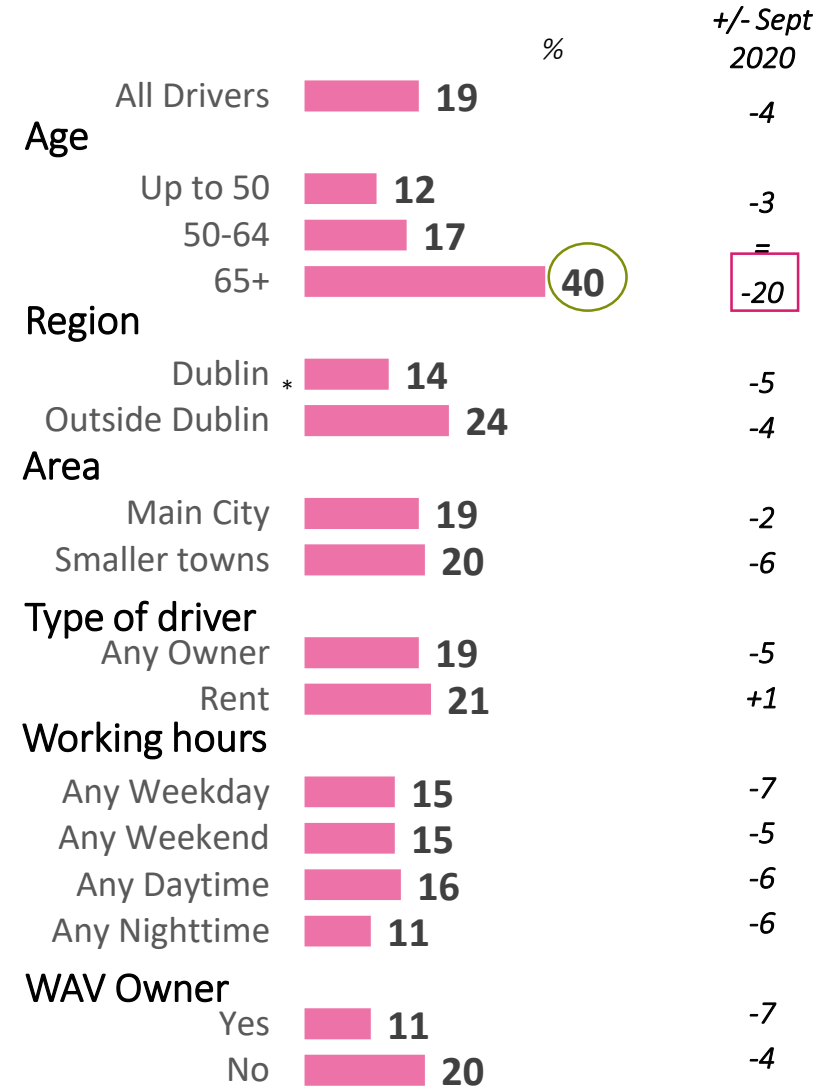


Around a quarter of those not working are waiting for restrictions to be lifted/things to open back up again, while more than 1 in 7 (15%) are waiting on the vaccination programme to be rolled out/themselves or family to have been vaccinated.

Future plans for career

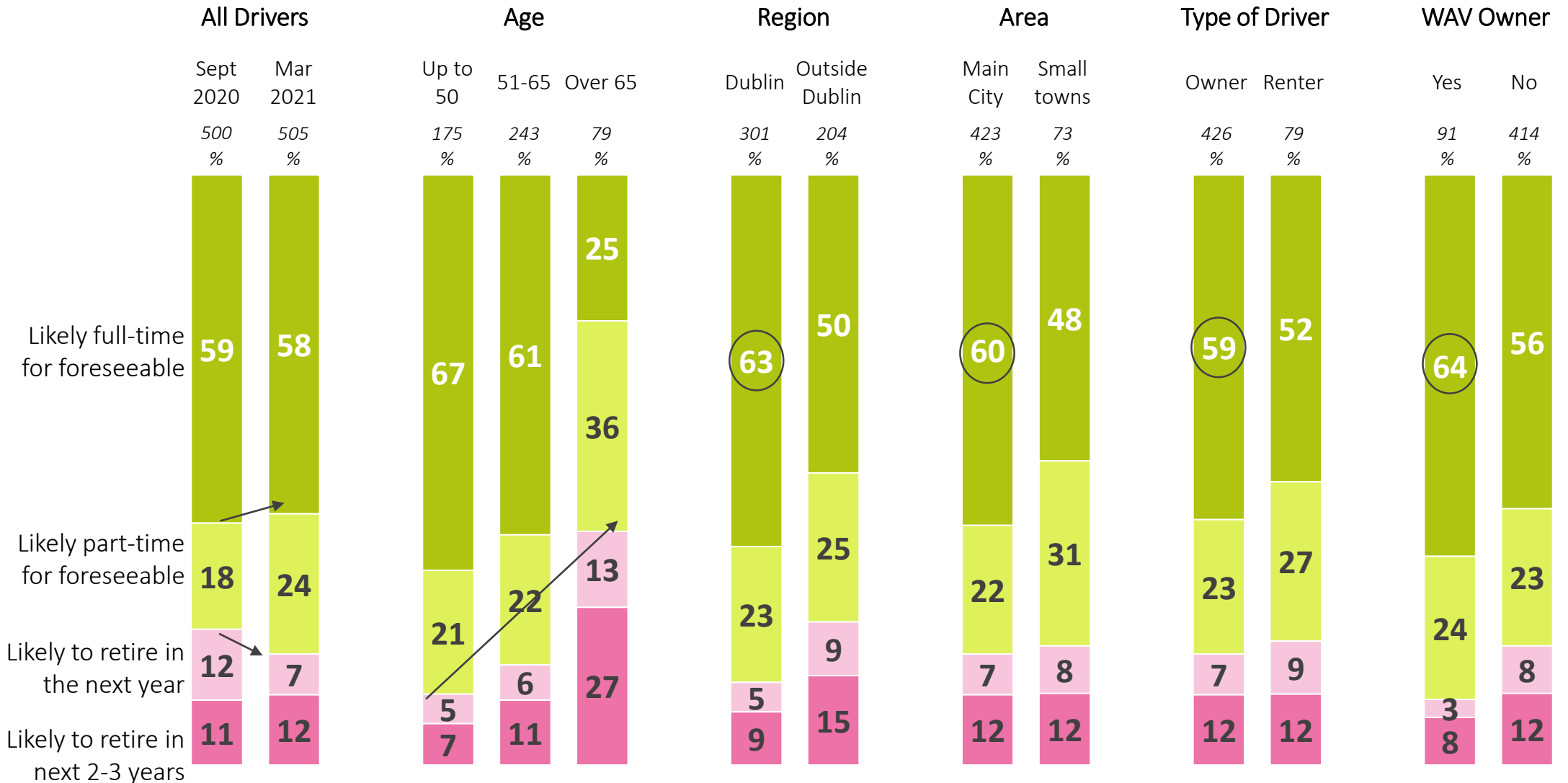


Any likely to retire in next 3 years



A fifth (19%) of taxi drivers interviewed indicate that they are planning to retire or quit the profession in the next three years (-4% pts vs September 2020). Slight decline driven by a substantial one among those over the age of 65 (40% now suggesting they will retire in comparison with 60% in September). However, it should be noted, that the shift is more towards part-time work (+6% pts) than full time work (-1% pt)

Future plans for career

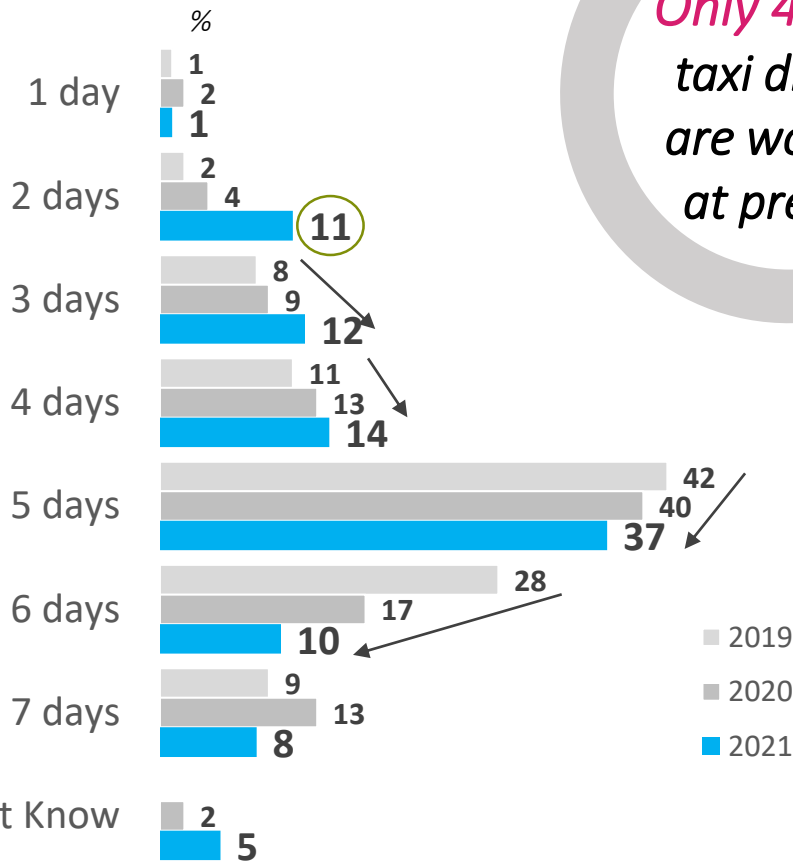


Shift towards part-time work evident this wave (+6% pts), while likelihood of retiring in the next 3 years appears to increase with age. Those in Dublin, working in main cities, taxi owners and/or those with a WAV are the more inclined to suggest they will work full-time for the foreseeable.

*Caution: small base

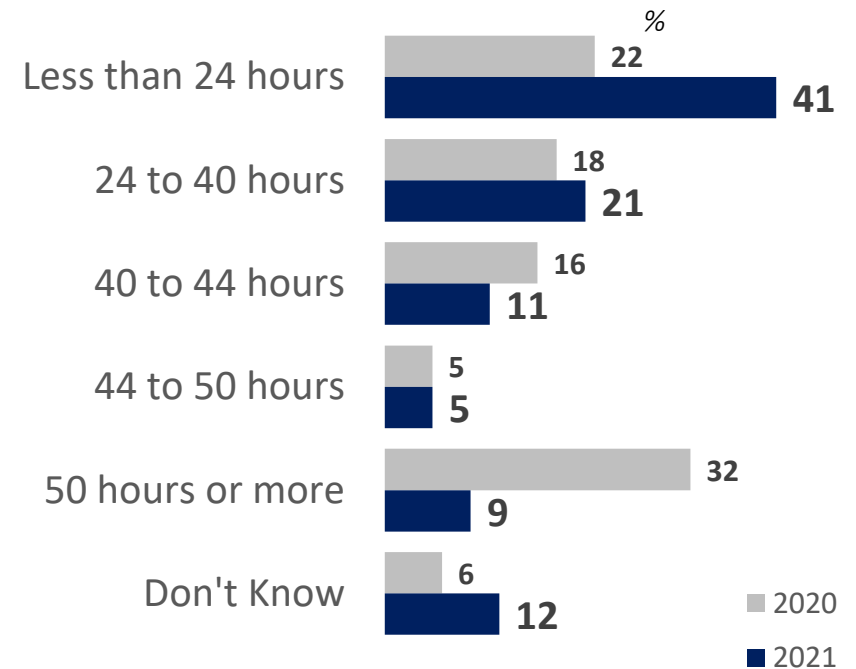
Current working hours

Number of days working



Only 48% of taxi drivers are working at present

Number of hours working

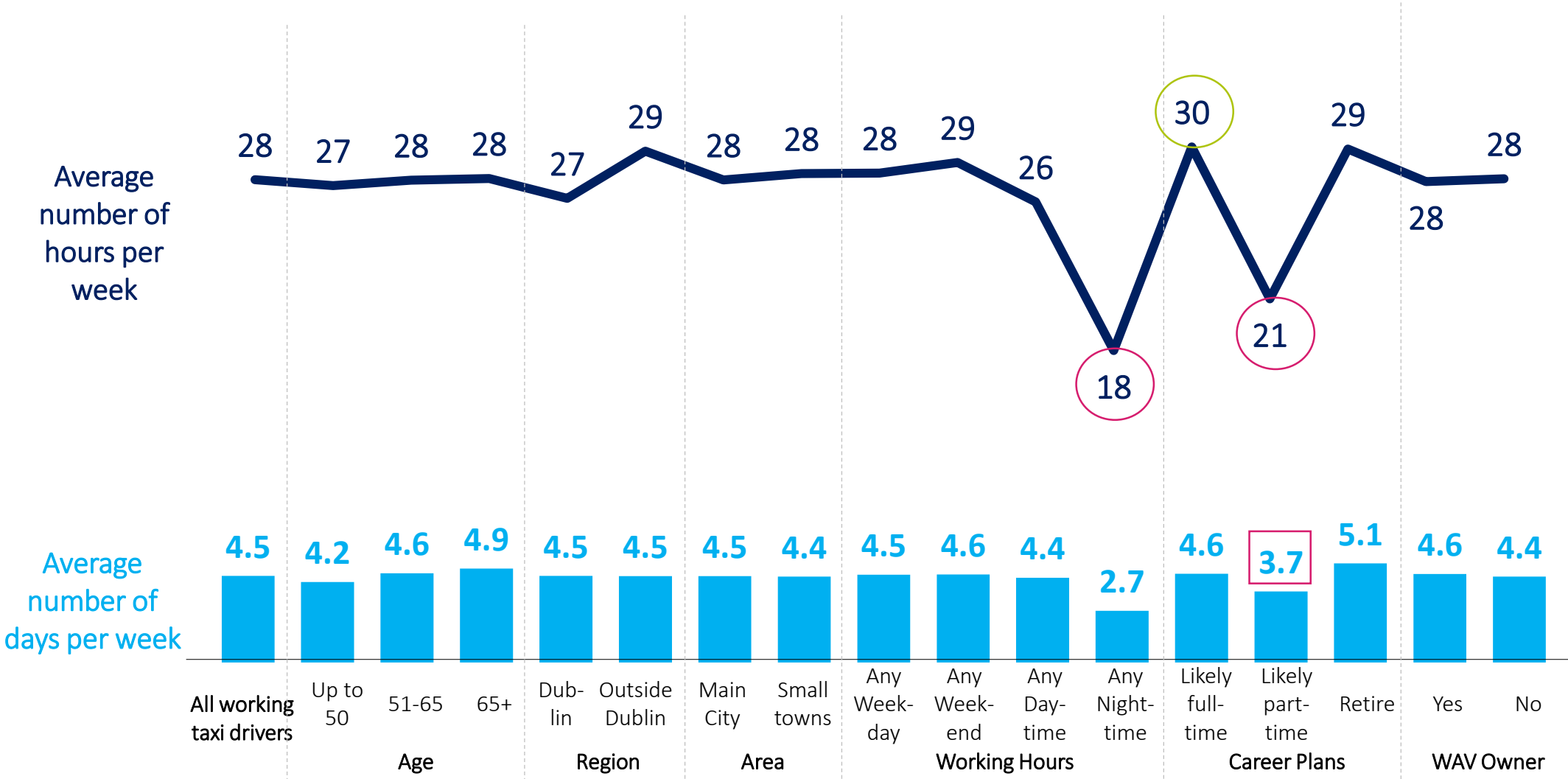


Average no. of days 2021	4.5 days
Average no. of days 2020	4.9 days
Average no. of days 2019	5.1 days

Average no. of hours 2021	28 hours
Average no. of hours 2020	38 hours
Average no. of hours 2019	44 hours

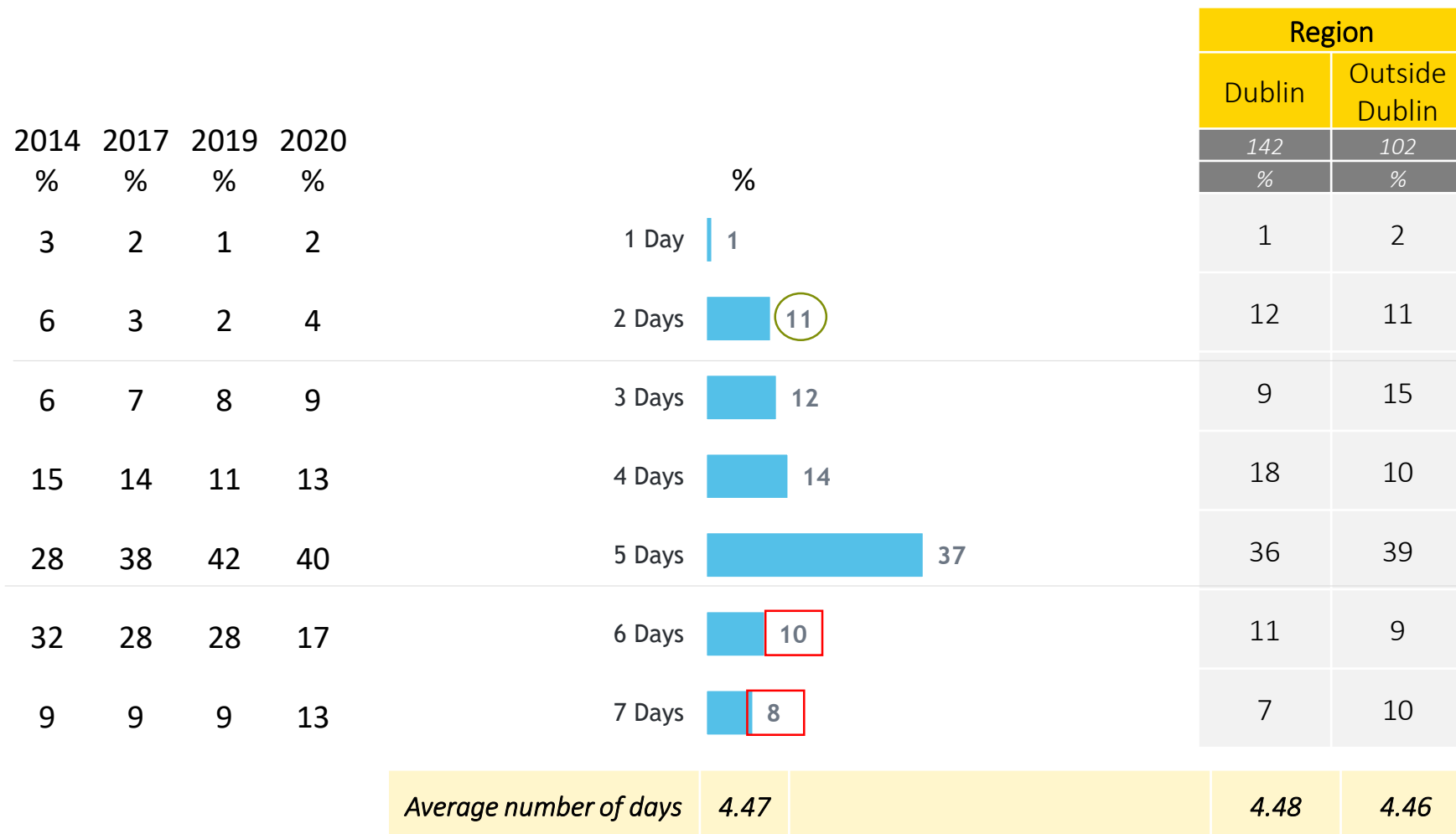
While we see a downward trend in terms of the proportion working 5 or 6 days per week, there has been an increase in the proportion working 2, 3 or 4 days. Sharp reduction in the number of hours worked per week also (from 38 hours in September 2020 to just 28 hours in March 2021).

Average working hours by driver profile



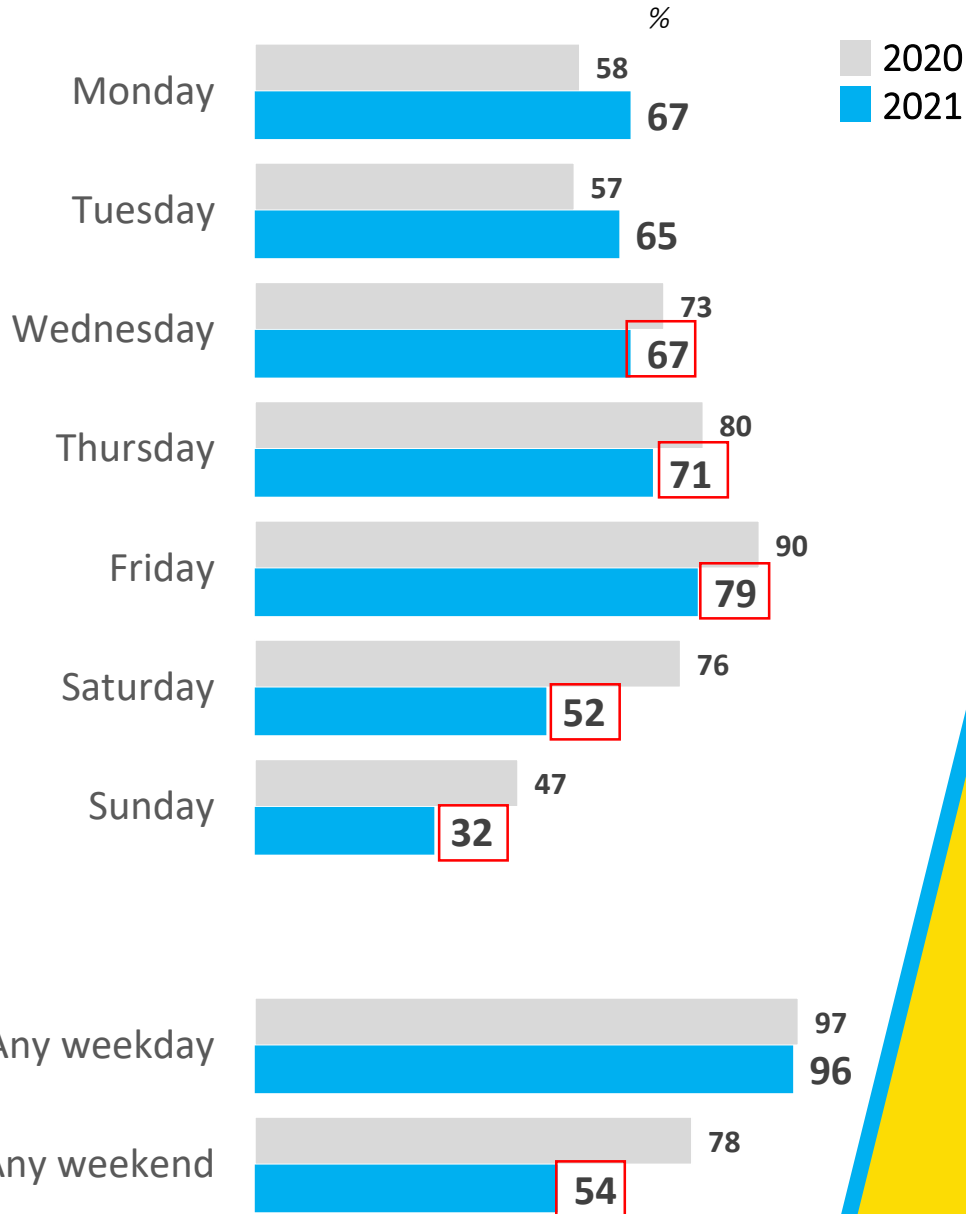
Those who are working any night time hours and those likely to work part time for the foreseeable are working fewer hours per week on average. Little difference within other taxi driver cohorts.

Number of days per week normally work



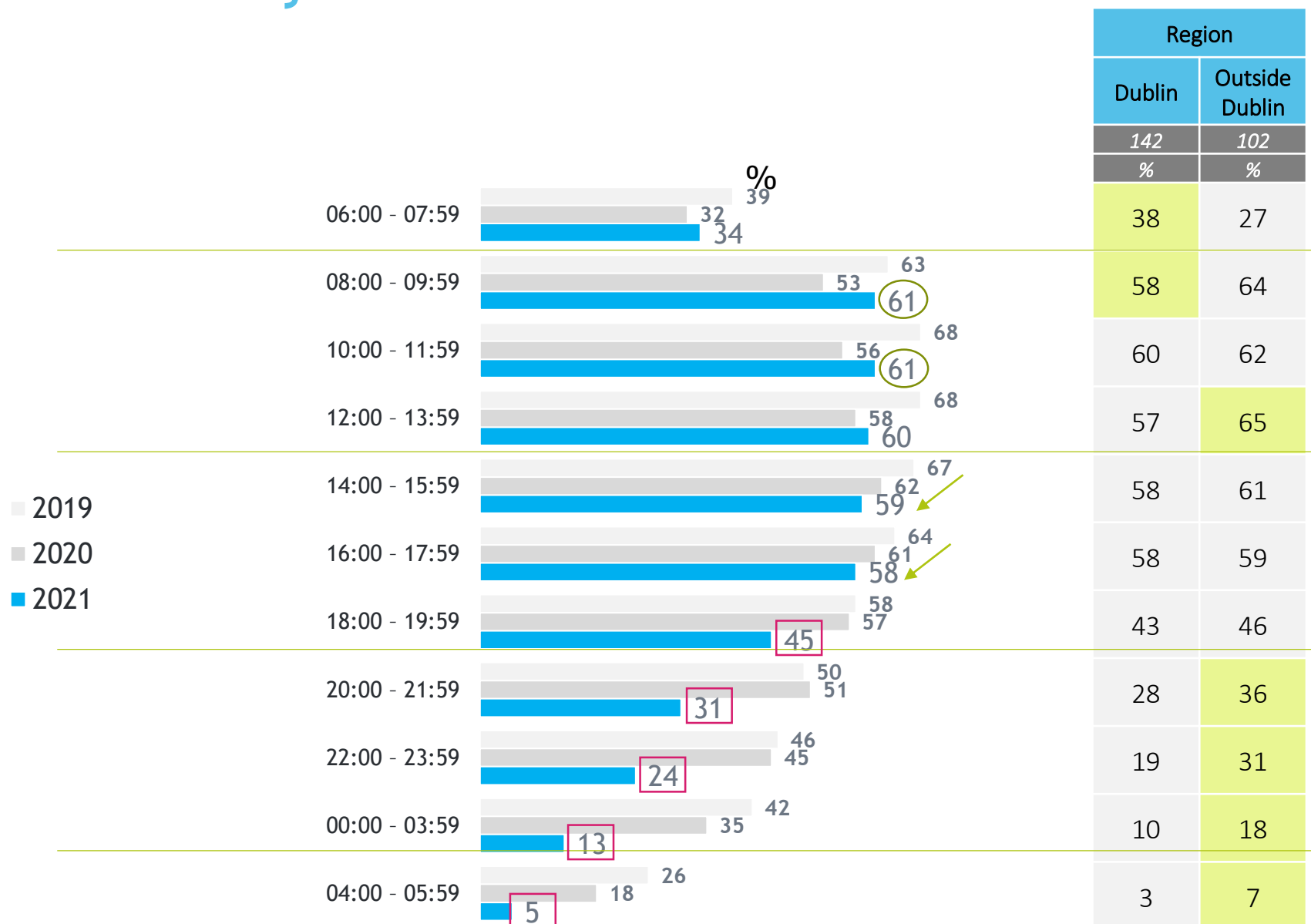
Fewer working 6 or 7 days a week, while we see a substantial increase in the proportion working 2 days a week (+7% pts).

Days typically work



The vast majority (96%) continue to work on any weekday, while we see a sharp decline in proportion working on weekends (-24% pts to 54%).

Time normally work

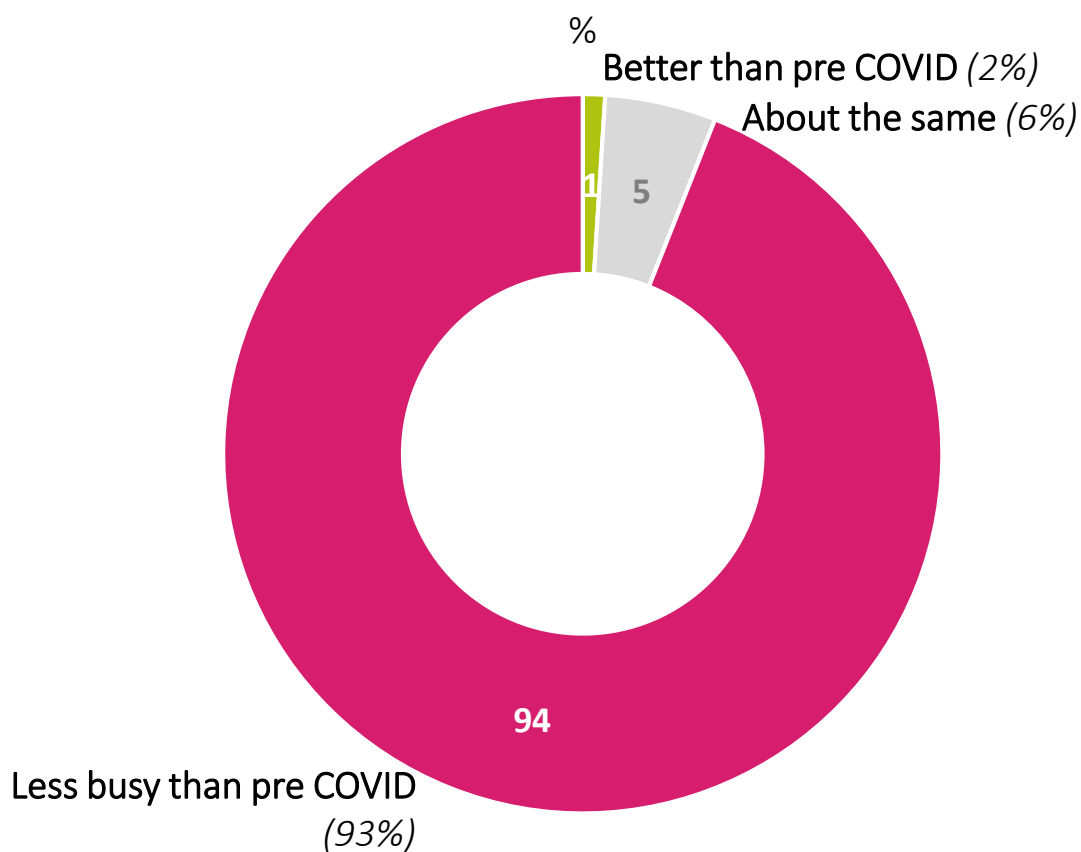


Higher proportion of taxi drivers working in the morning now, while fewer working the evening/night-time shifts. Morning shifts more common in Dublin, whereas evening shifts more common outside Dublin (bearing in mind, majority working earlier in the day outside Dublin).



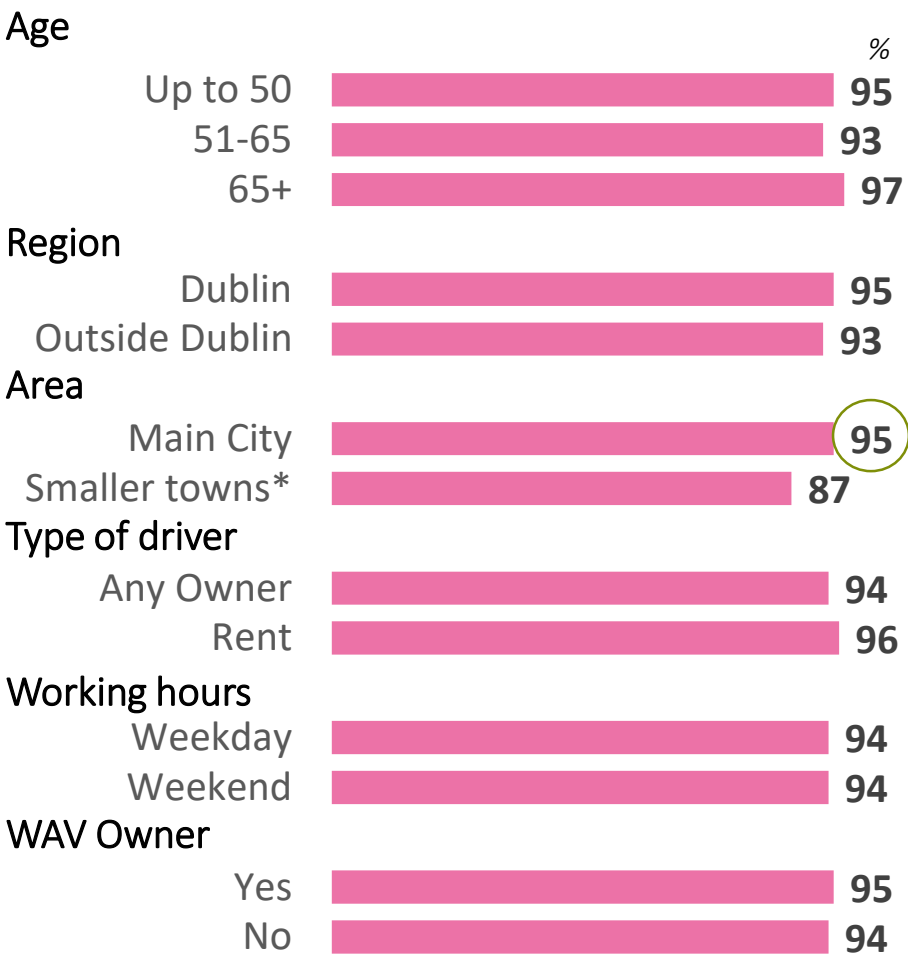
94% of working
taxi drivers are less
busy than they
were pre-COVID.
(+1% pt vs Sept 2020)

Demand for taxi services compared with pre COVID

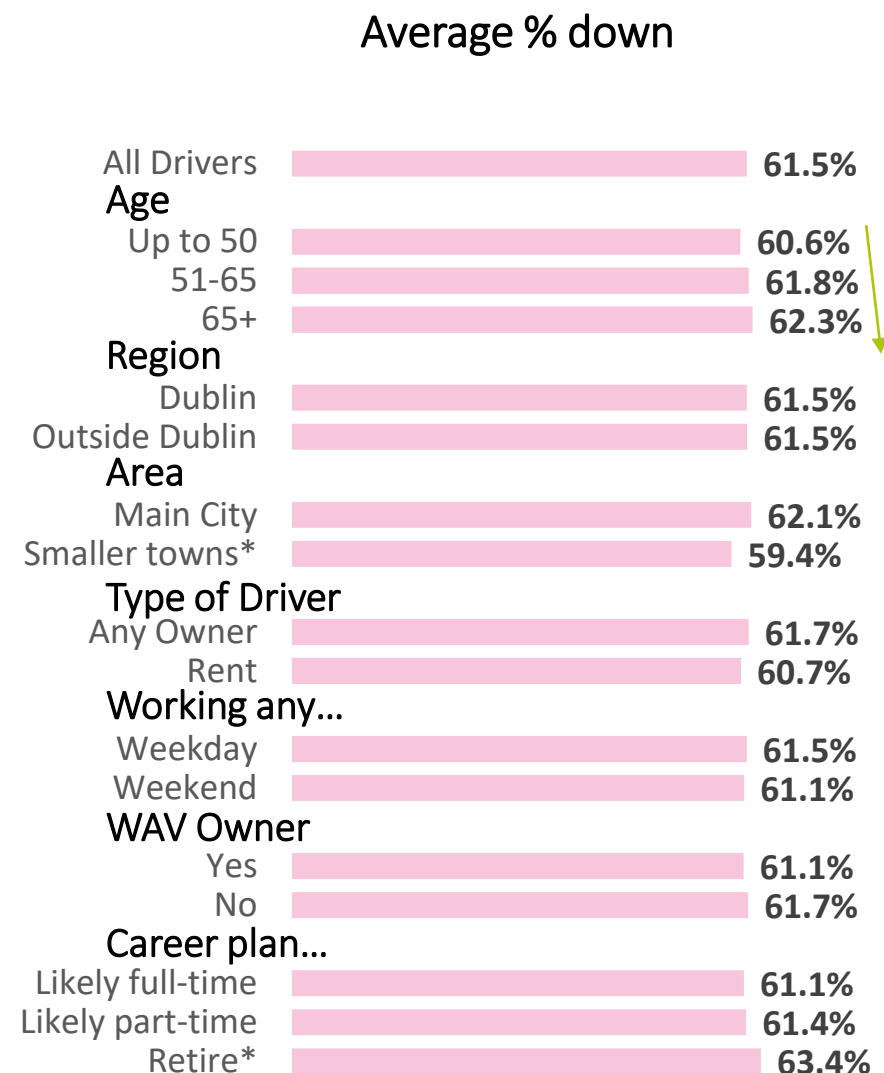
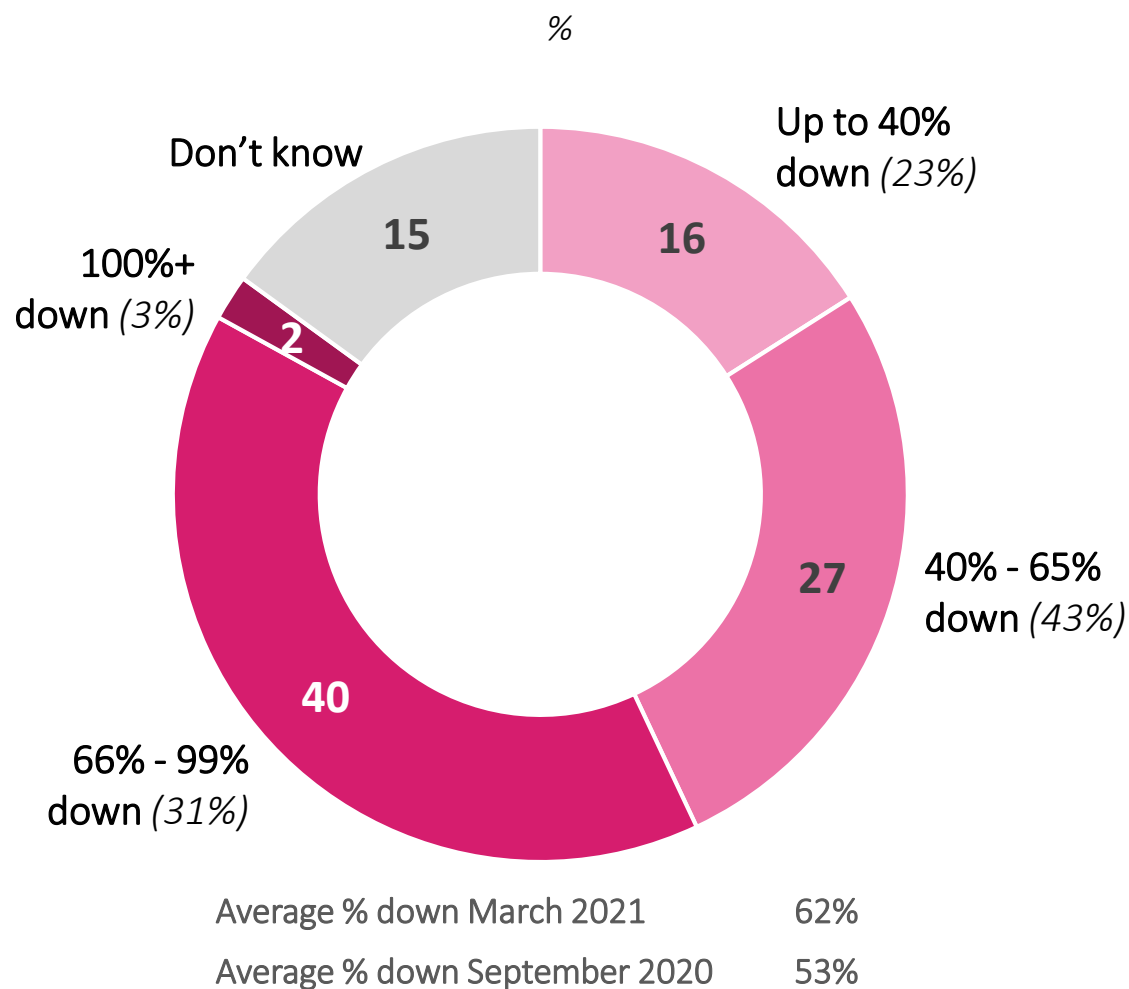


Those working in main cities are the most likely to suggest they are less busy than they were in pre-COVID times.

Any less busy



How much less are drivers working?

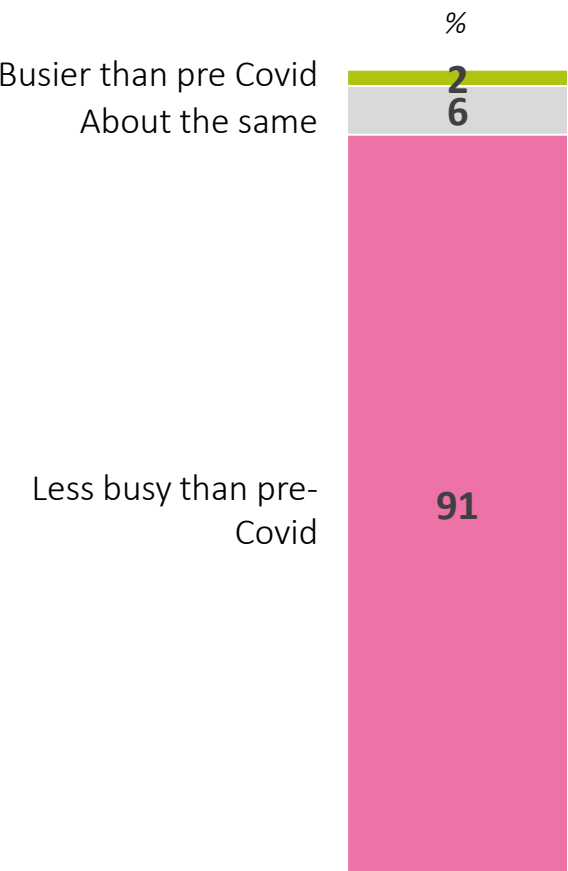


On average, drivers who are working are down 62%, with an increase in the proportion suggesting they are down between 66%-99% this wave (+9% pts) in comparison with September 2020.

*Caution: small base

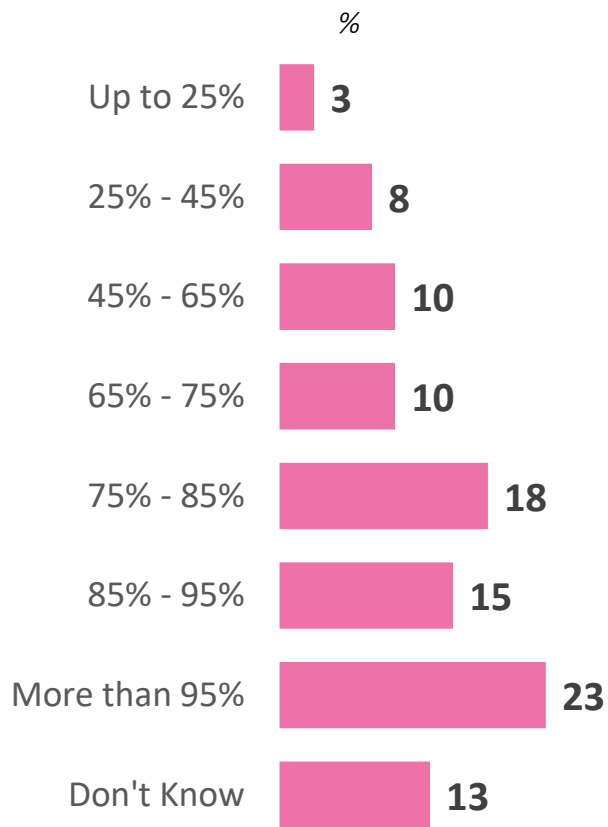
Business compared with pre-Covid for those who were working but stopped

While working were...



% less busy than pre-COVID times

(116 were less busy when working)



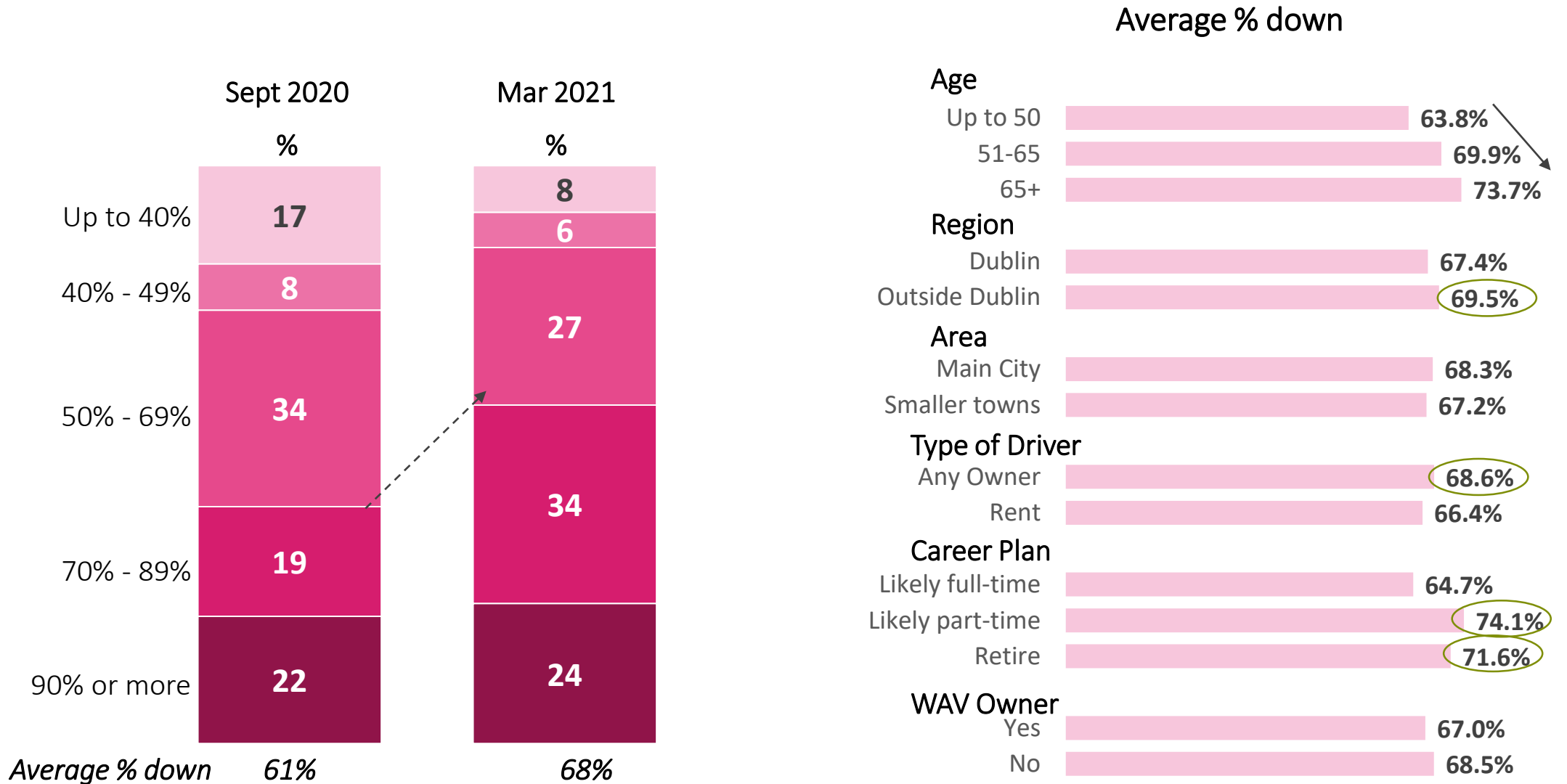
Down 75% on average

Of those who were working during the pandemic but are not now, a similar 9 out of 10 suggested they were less busy than pre-Covid times, with more than half (56%) of those who were less busy indicating business levels were down 75% or more.



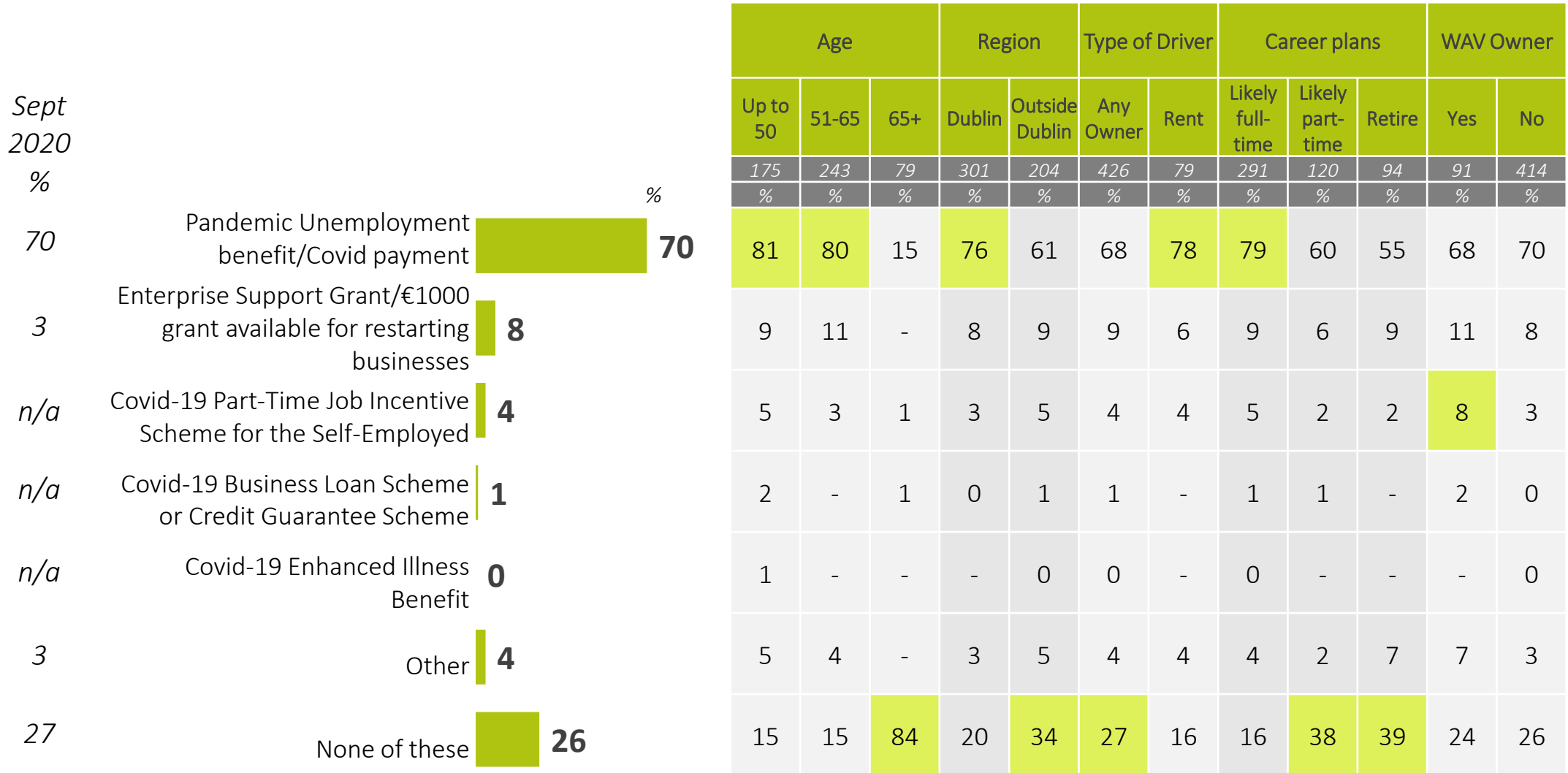
**Almost all
(96%) taxi
drivers are
earning less
now than they
were pre-COVID.
*(-1% pt vs September 2020)***

How much less are drivers earning?



There has been an increase in the proportion of taxi drivers indicating their income is down 70% or more this wave (+17% pts). Loss of earnings appear to increase with age, while those working outside Dublin (particularly in Leinster, although small base size here) have been hit the hardest. Owners and those who are likely going to work part time/retire in the foreseeable are more inclined to see a bigger drop in income than others also.


Government supports availed of



Older drivers, those outside Dublin, taxi owners and those who are likely to work part-time or retire in the foreseeable are more inclined to suggest they received no supports. Meanwhile, younger drivers, those working in Dublin, taxi renters and those likely to work full time for the foreseeable are the most inclined to have availed of the PUP.



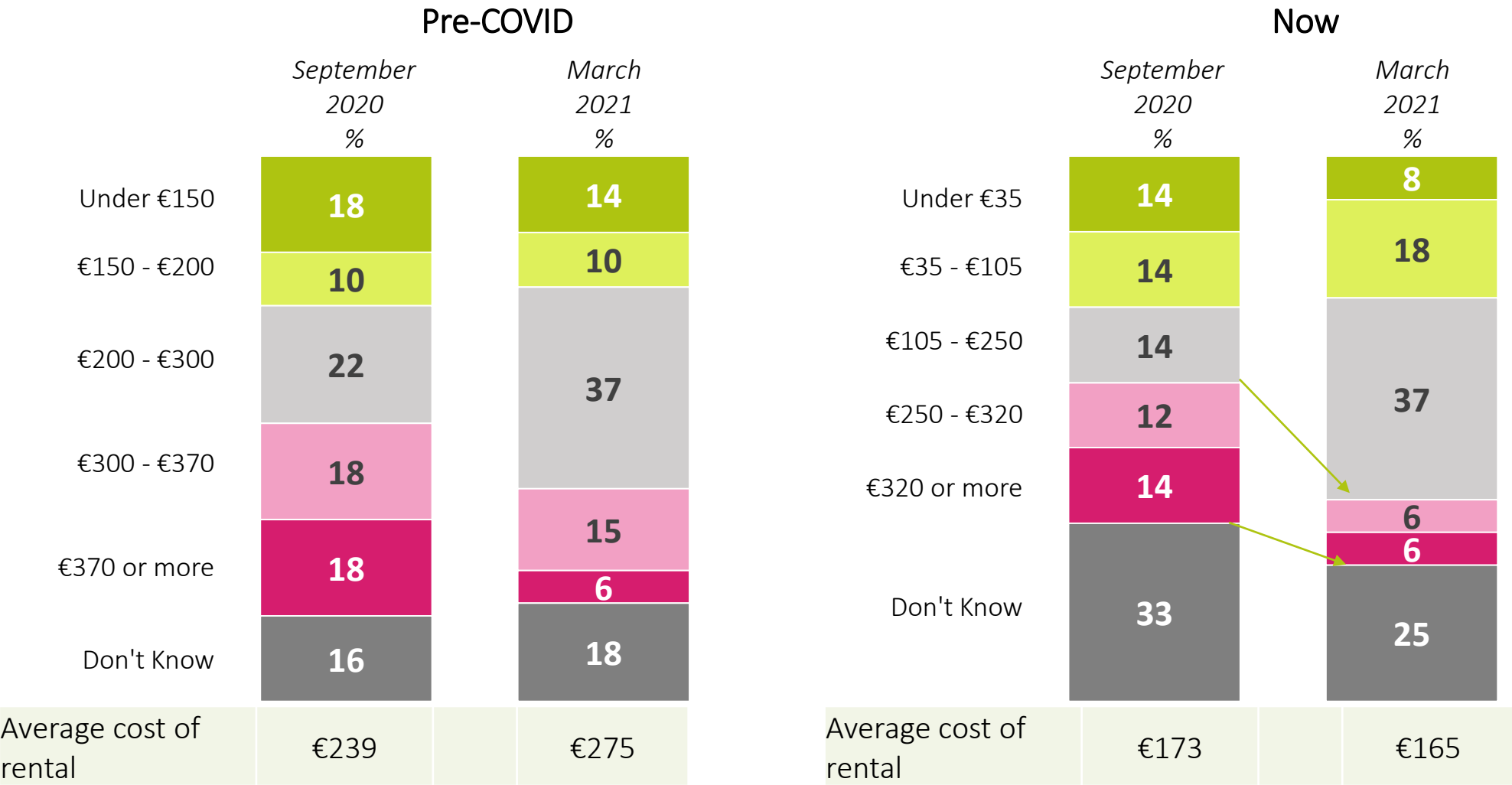
**Impact of COVID-19 on
expenses/work practices**



According to taxi
renters, the average
weekly cost of renting
has gone from €275
pre-COVID to €165
now.

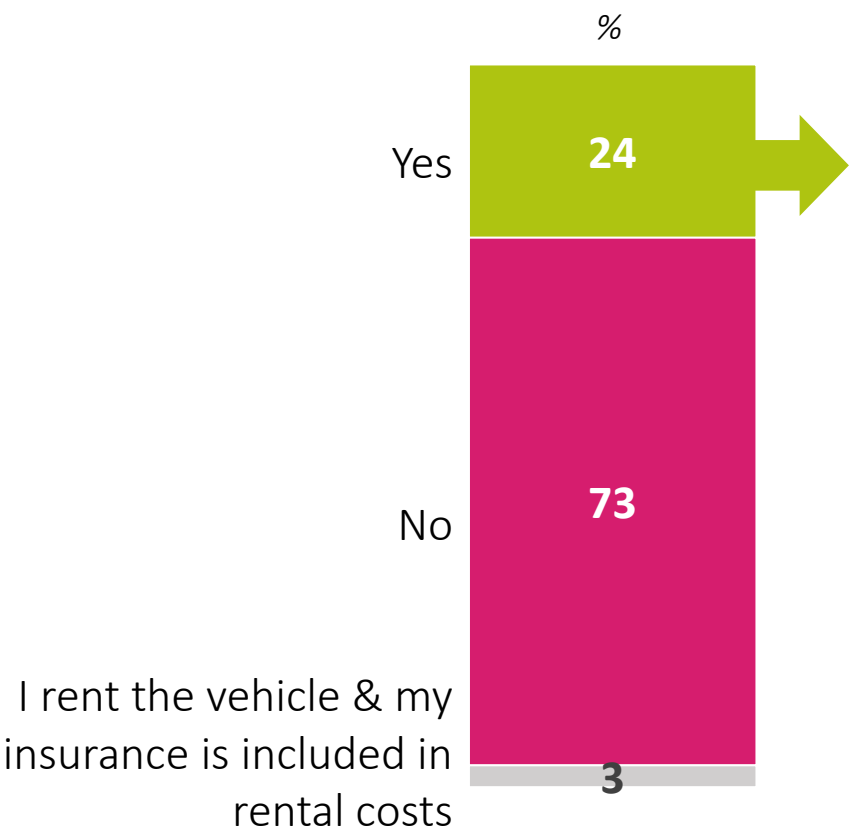
(averages €239 and €173 in
September 2020)

Weekly rental cost before and since COVID

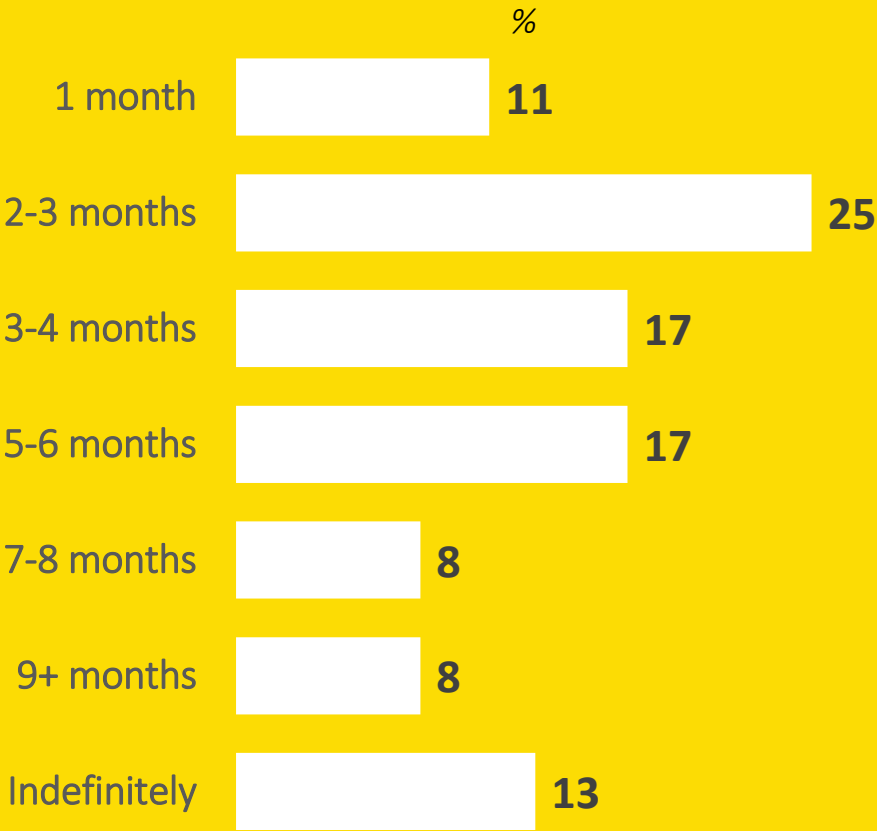


Fewer suggesting they are paying a weekly fee of €250 or more now than did in September 2020, as the average weekly rental cost drops from €173 to €165.

Incidence of reducing insurance cover since pandemic began

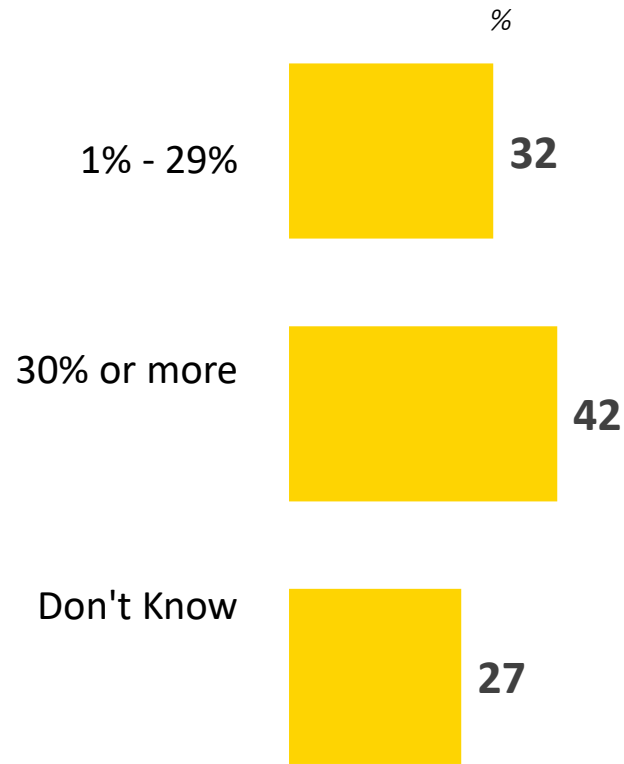


How long reduced insurance for *(Base: 121 taxi drivers reduced insurance cover)*



A quarter (24%) of taxi drivers have reduced their insurance cover at some point since the pandemic began, with 1 in 8 (13%) of those who did claiming to have done so indefinitely.

Percentage discount received on annual insurance premium

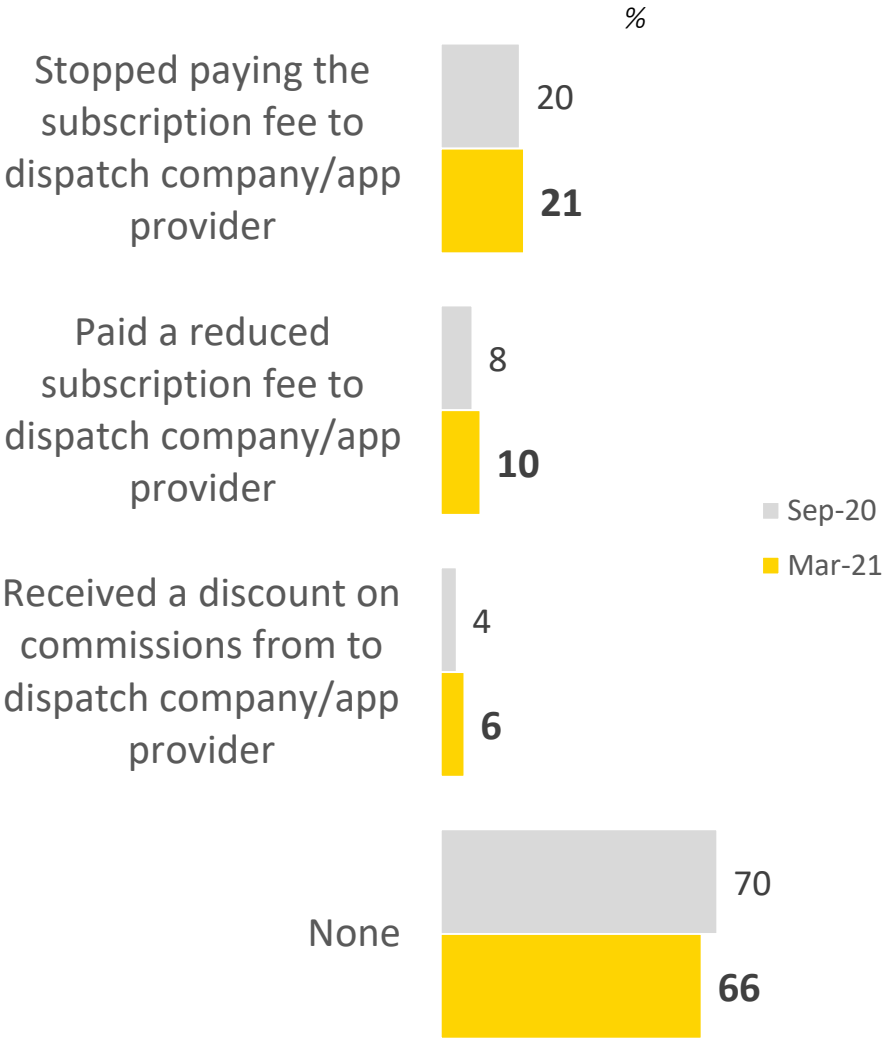


Average percentage
discount given on annual
insurance premium

34.1%

More than 2 in 5 (42%) received a discount of 30% or more.

Change in fees paid to dispatch company/ app provider



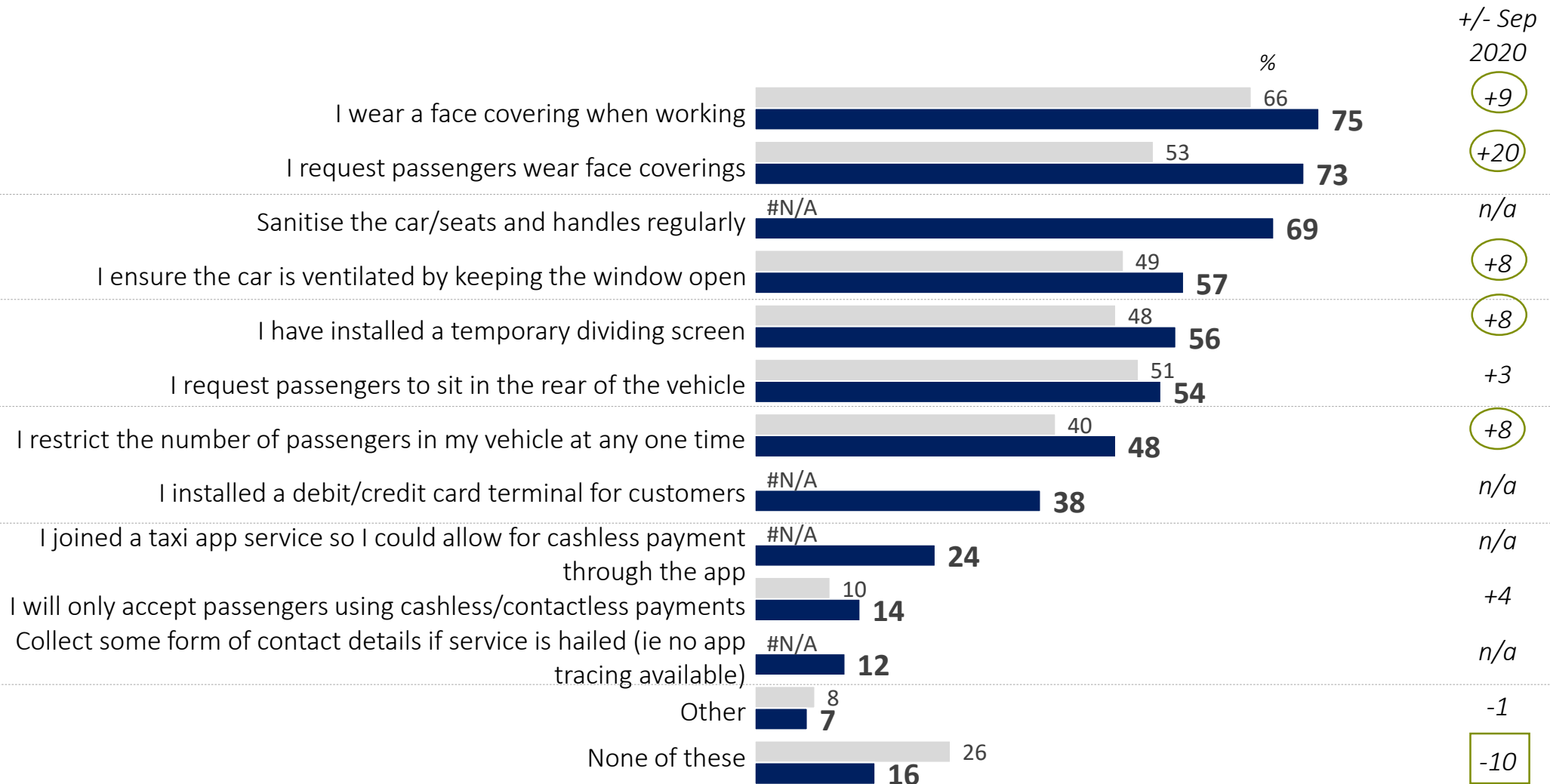
**Caution: small base*

Average percentage discount given on annual subscription to dispatch/app provider
(Base: 29 taxi drivers)*

36.9%
(31.7% Sept 2020)

Measures put in place to ensure safety

Sep 2020
Mar 2021



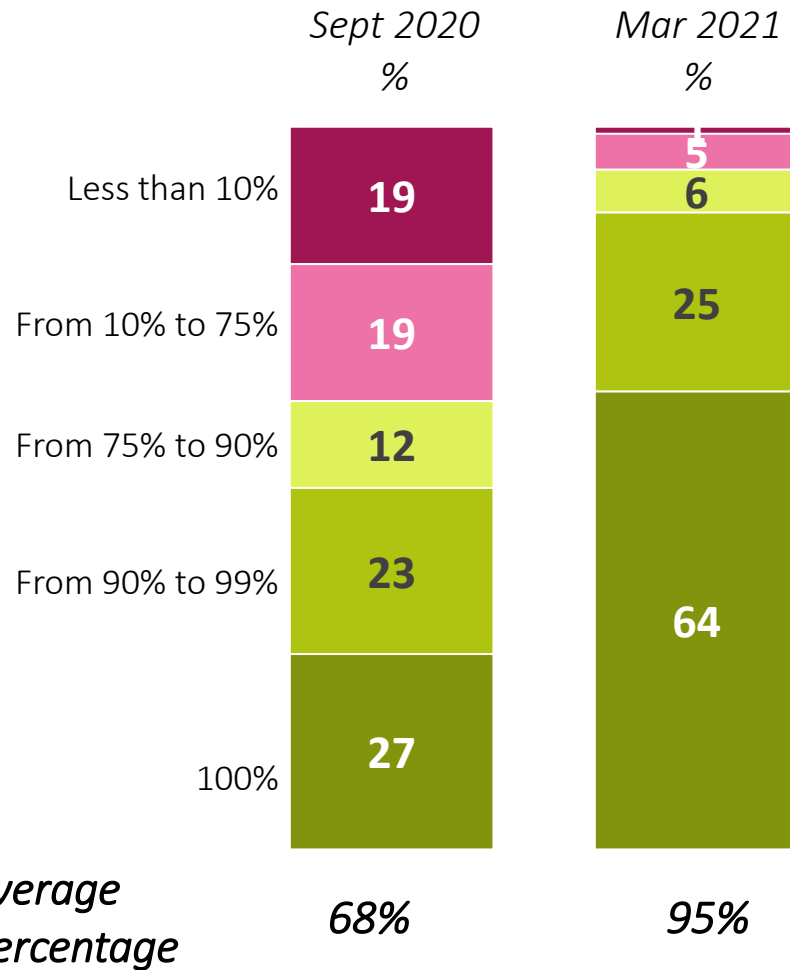
Fewer taxi drivers with no measures in place this wave (-10% pts), while we see a substantially higher proportion wearing face coverings (+9% pts), requesting that passengers do the same (+20% pts), leaving the window open (+8% pts), installing a temporary screen (+8% pts) and/or restricting the number of passengers at any one time (+8% pts).

Measures put in place to ensure safety by driver profile

	All Drivers	Age			Region		Area		WAT		Use....			Working at present	
		Up to 50	51-65	65+	Dublin	Outside Dublin	Main City	Small towns	Yes	No	App	Dispatch	Neither	Yes	No
<i>Base:</i>	505	175	243	79	301	204	423	73	91	414	320	100	132	244	261
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I ensure the car is ventilated by keeping the window open	57	65	51	59	57	58	56	62	57	57	63	61	45	70	46
I wear a face covering when working	75	89	67	72	73	78	74	81	88	72	82	78	61	91	61
I request passengers wear face coverings	73	84	66	72	71	76	72	78	85	70	79	75	59	90	56
Sanitise the car/seats and handles regularly	69	78	66	65	68	71	69	68	78	67	76	72	57	84	55
I have installed a temporary dividing screen	56	67	54	41	60	51	59	49	65	54	66	59	34	72	42
I request passengers to sit in the rear of the vehicle	54	61	51	54	53	57	54	62	54	54	62	66	37	69	41
I restrict the number of passengers in my vehicle at any one time	48	55	47	39	49	48	48	55	52	47	55	55	36	60	38
I installed a debit/credit card terminal for customers	38	45	38	28	41	34	39	33	41	38	47	42	21	49	28
I joined a taxi app service so I could allow for cashless payment through the app	24	28	24	21	28	18	24	26	26	24	33	21	9	29	20
I will only accept passengers using cashless/contactless payments	14	19	11	15	15	14	14	14	17	14	17	15	10	15	14
Collect some form of contact details if service is hailed (i.e. no app tracing available)	12	13	12	14	11	14	11	21	13	12	13	18	10	14	11
Other	7	5	9	5	8	6	7	6	7	7	6	5	9	3	10
None of these	16	7	20	17	16	15	16	15	7	17	10	14	28	3	27

Younger drivers, those working at present and those who work on behalf of an app service are the most likely to have taken on a wider range of these measures. Overall, the majority of taxi drivers have taken on some measures (even among those who are not working at present).

Percentage of customers wearing masks now

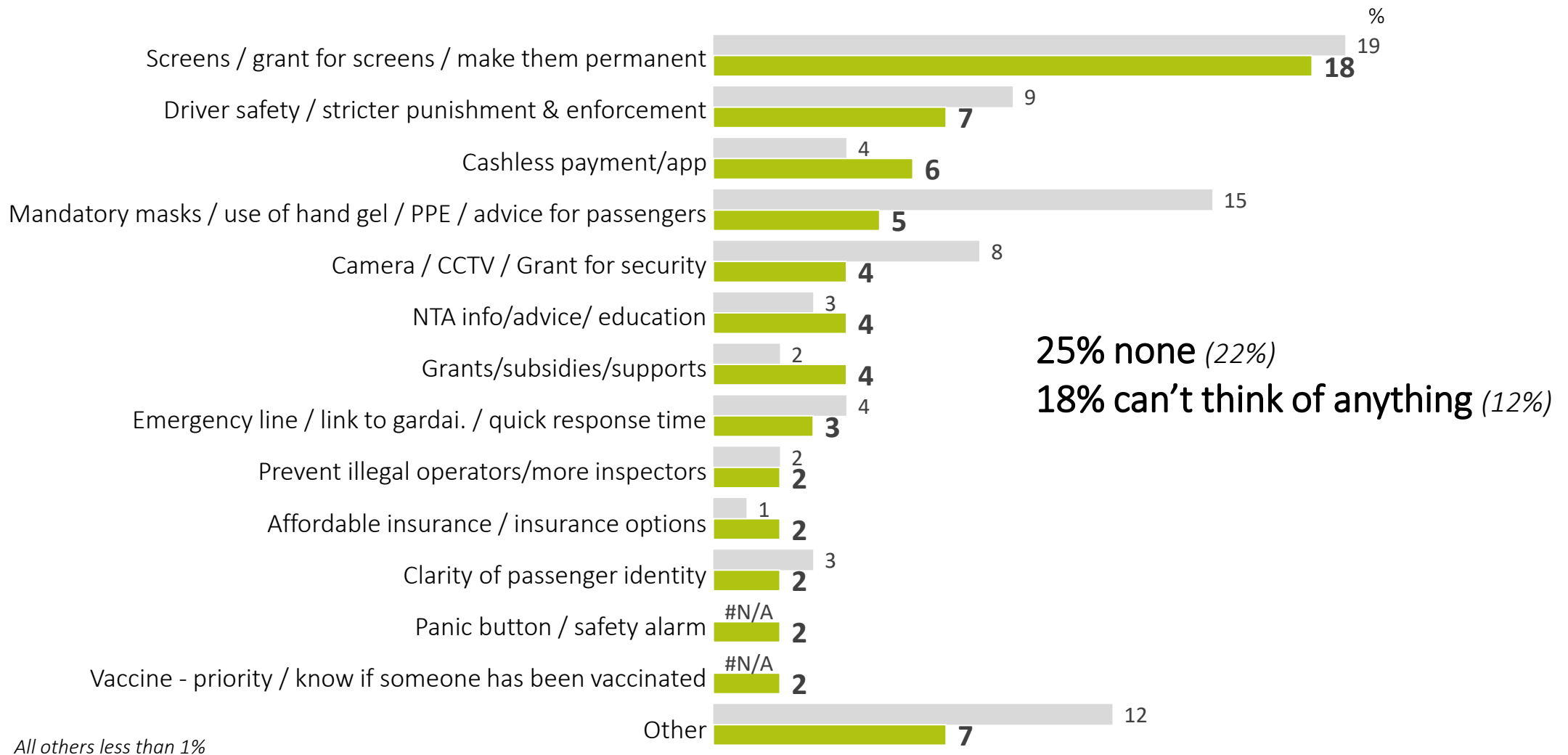


There has been a significant increase in the proportion who feel that all passengers are wearing masks now: on average taxi drivers feel 95% of customers are (up from 68% in September 2020).

This is an encouraging improvement given the 'compulsory face covering' regulation introduced in December.

<https://www.nationaltransport.ie/compulsory-face-coverings-will-help-rebuild-confidence-in-spsv-sector/>

Safety measures that drivers believe would be beneficial



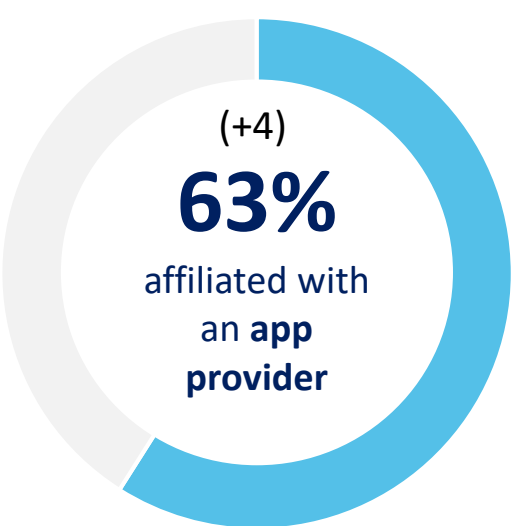
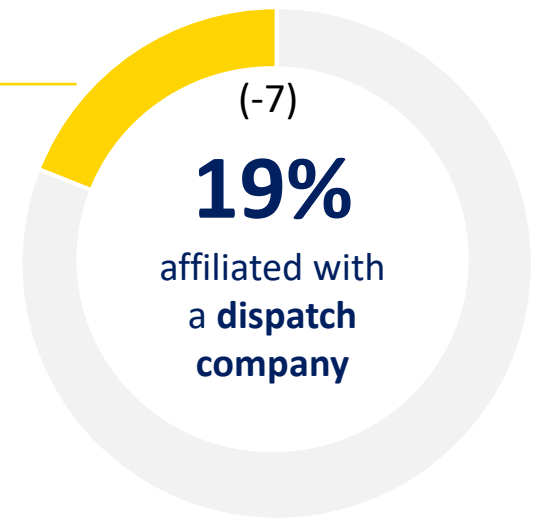
Grants for screens remain the most commonly mentioned measure suggested (18%), while there has been a decline in the proportion recommending the mandatory use of masks/hand gel etc. Fewer looking for a CCTV grant this wave also, although still 4% mention it spontaneously.



Cashless
payments

Taxi Driver Affiliates

Dublin	16%
Outside Dublin	25%



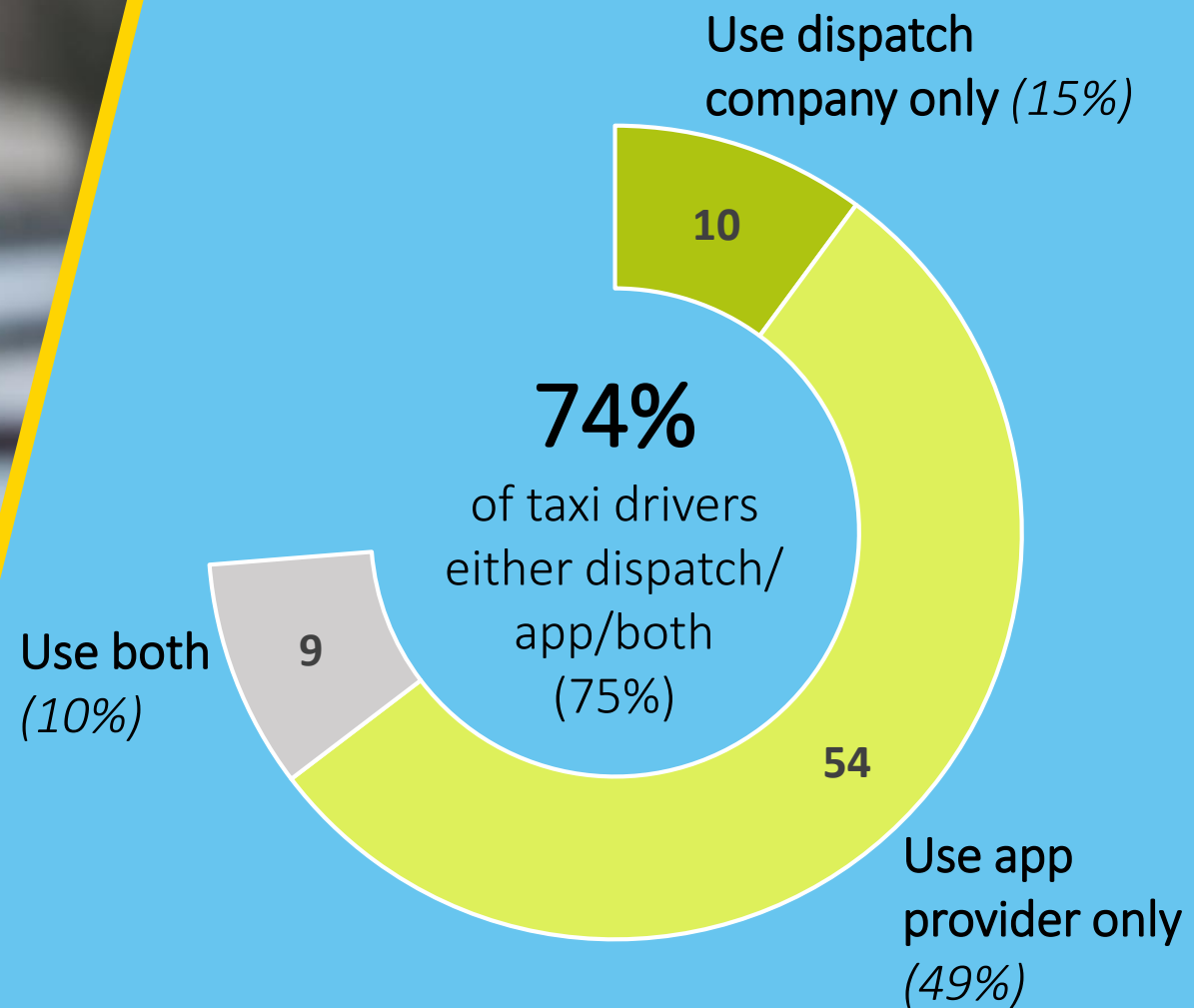
Dublin	69%
Outside Dublin	55%

(September 2020 results)



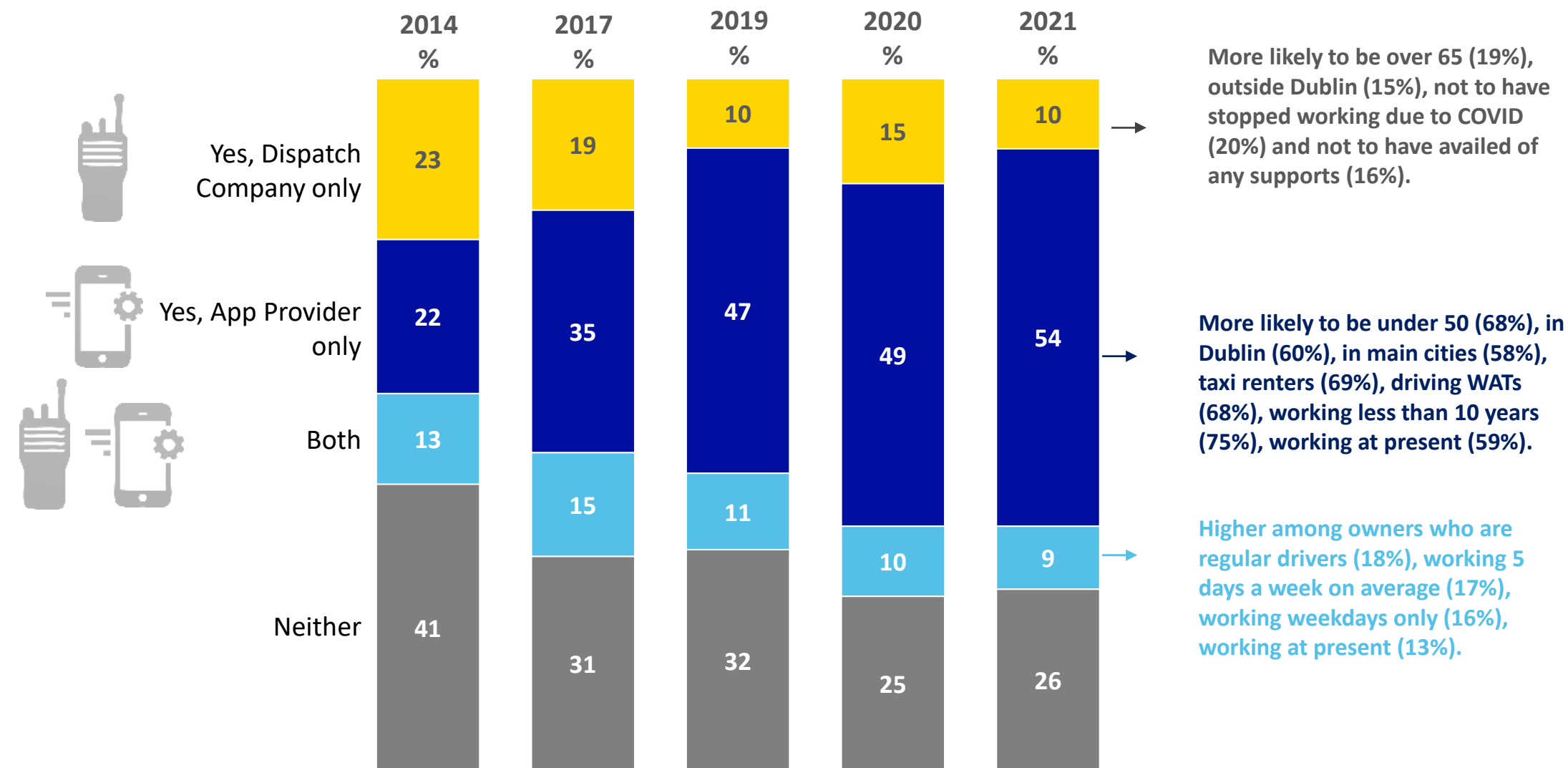


Use of apps/dispatch



(% September 2020)

Taxi Driver Affiliates



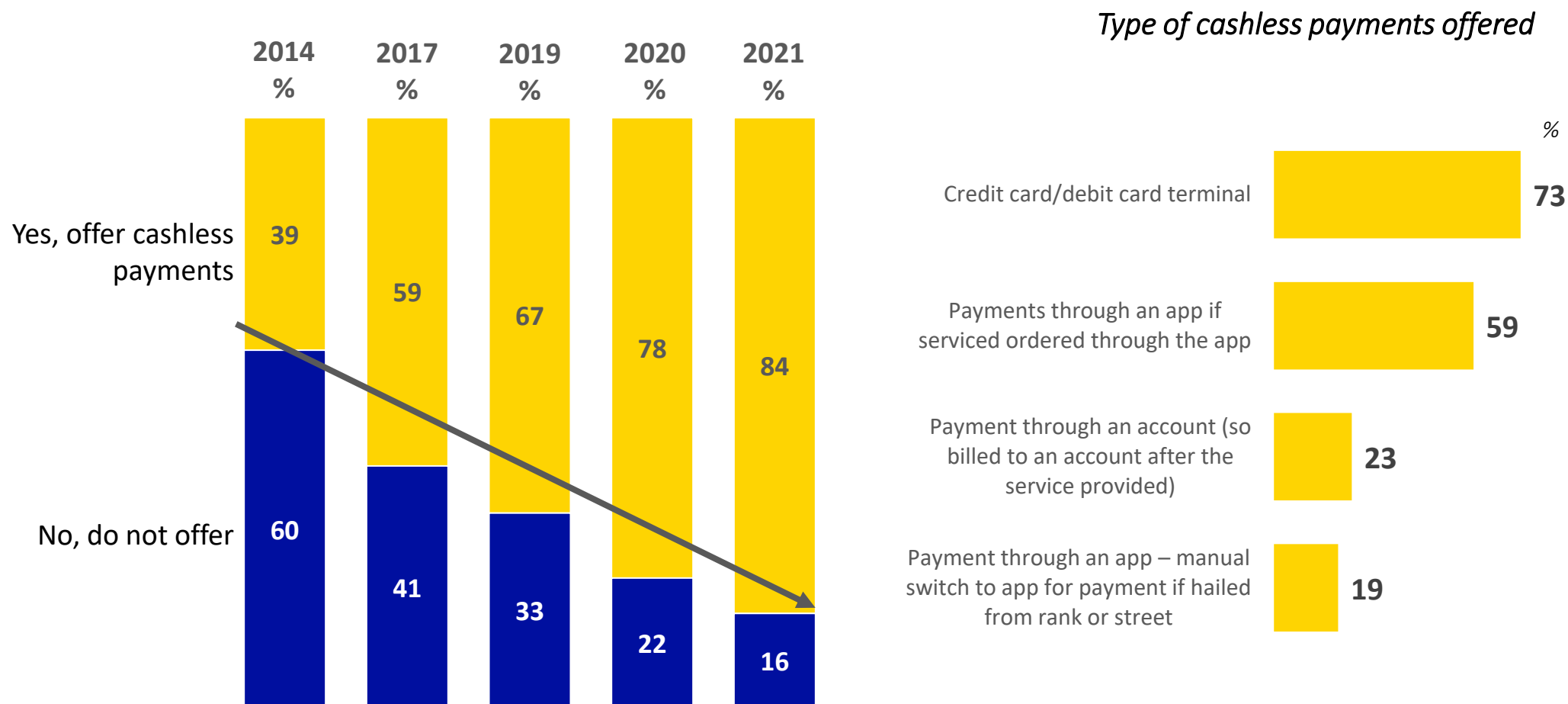
Usage of apps continues to grow, although this time it appears to be eating into the proportion of dispatch users rather than the proportion using neither. As we have seen previously, dispatch only users more inclined to be older and outside Dublin, whereas app only users more prominent in Dublin and among younger drivers.

App/Dispatch Crossover

	Any use of...	
	App	Dispatch
<i>Base:</i>	320	100
	%	%
Yes, Dispatch company only	-	53
Yes, App provider only	85	-
Both	15	47

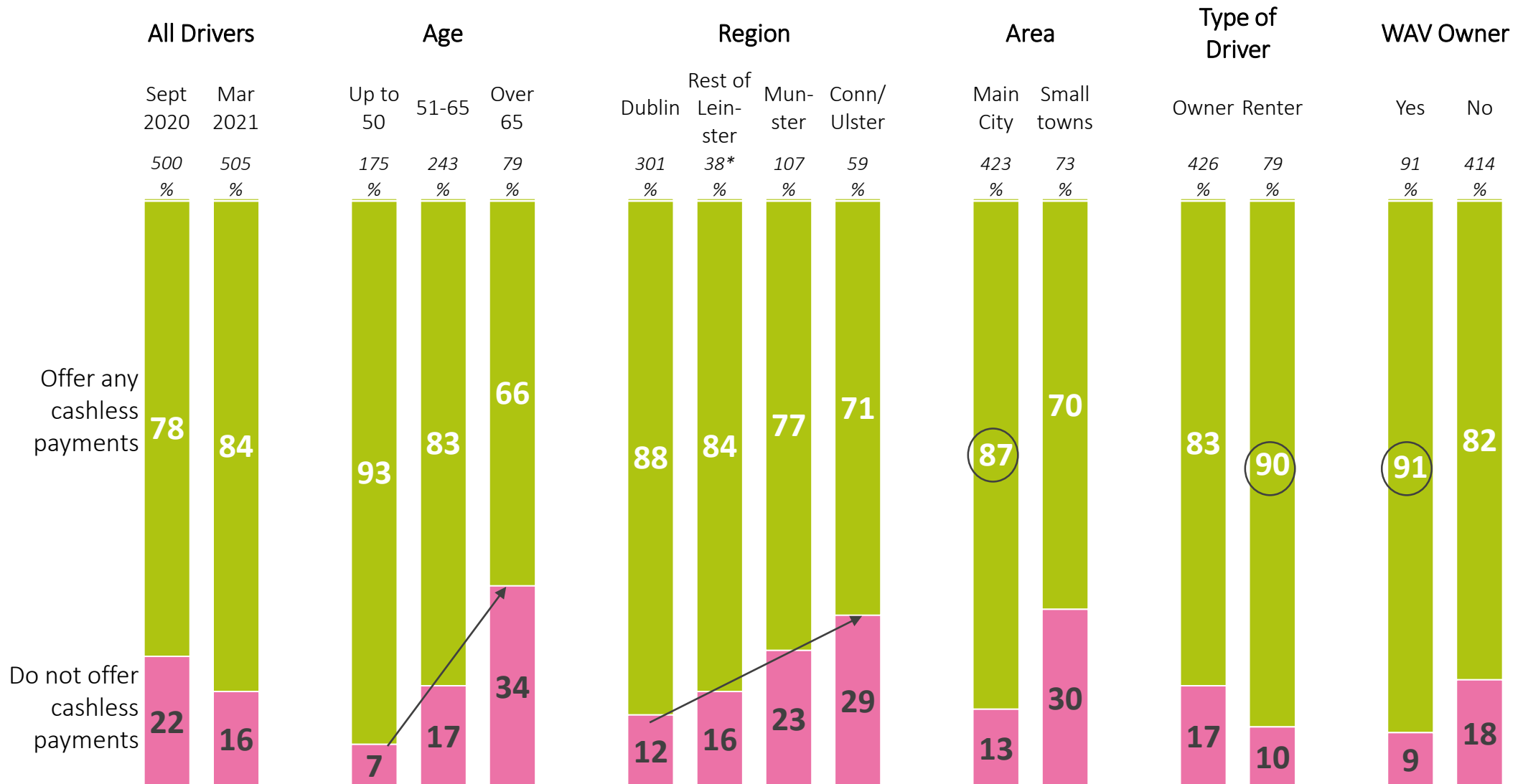
The vast majority of app users (85%) are using the app only, while almost half of those using a dispatch service (47%) are also using the app.

Incidence of cashless payments



Incidence of accepting cashless payments continues to grow, as 84% now offer this in some form. Almost three quarters (73%) of all drivers have a card terminal, while a further 3 in 5 (59%) offer payment through an app if the service is ordered in that manner.

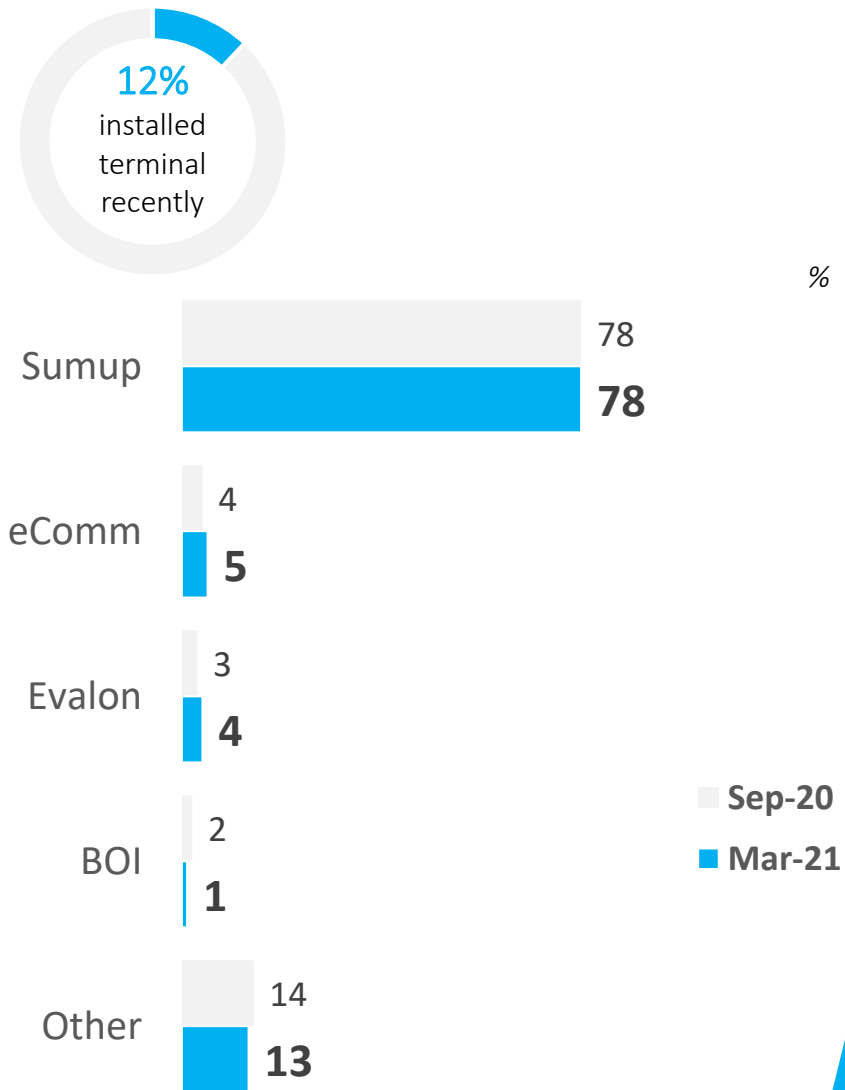
Cashless payments



Incidence of offering any cashless payments declines with age and declines the further you move from Dublin. Those working in main cities more likely to offer cashless payments, as are renters and those driving a WAT.

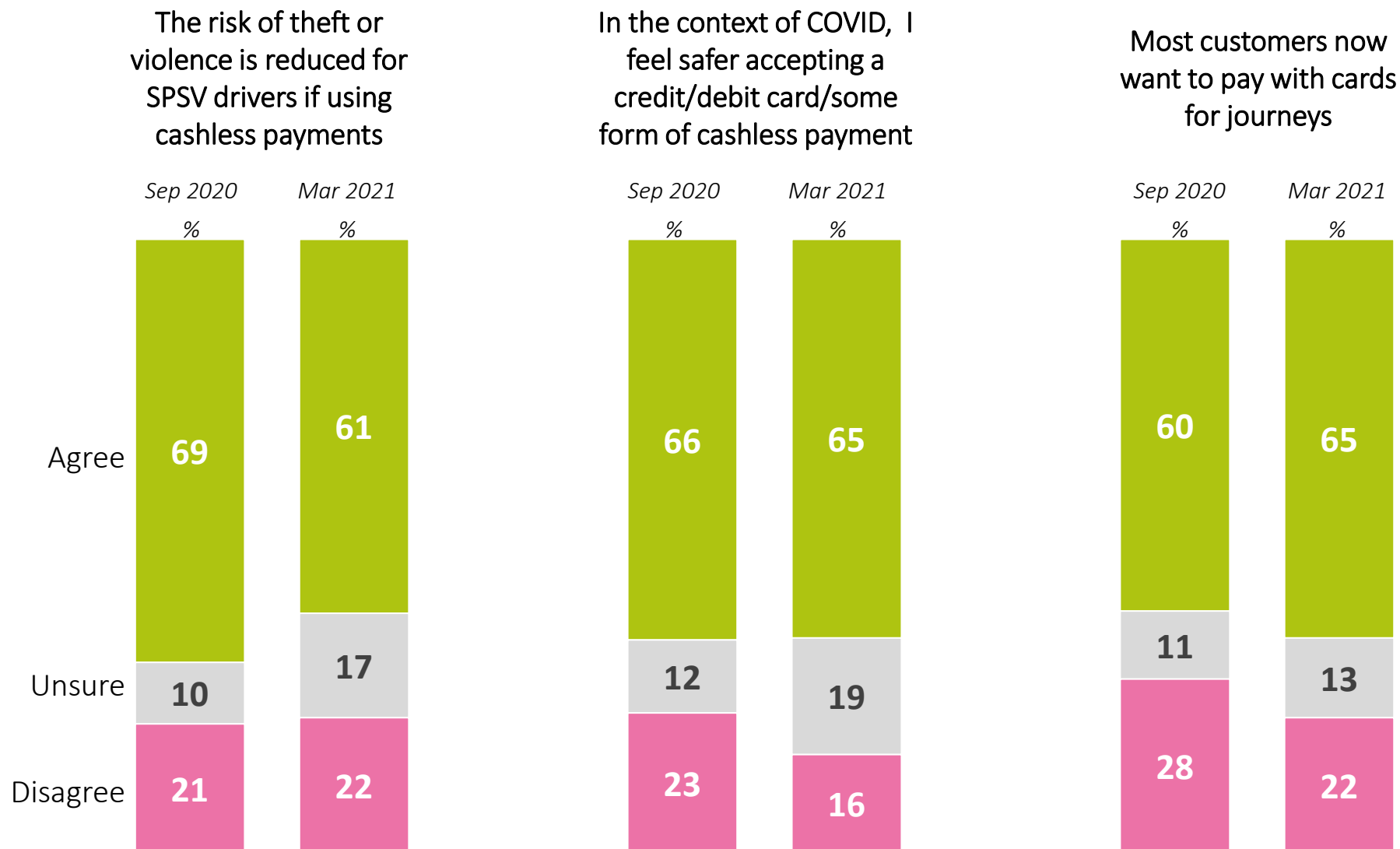
**Caution: small base*

Type of terminal used



Little change in the type of terminals being used: Sumup remains the most popular choice (78%). Meanwhile, the vast majority (88%) installed their terminal some time ago.

Attitudes towards cashless payments



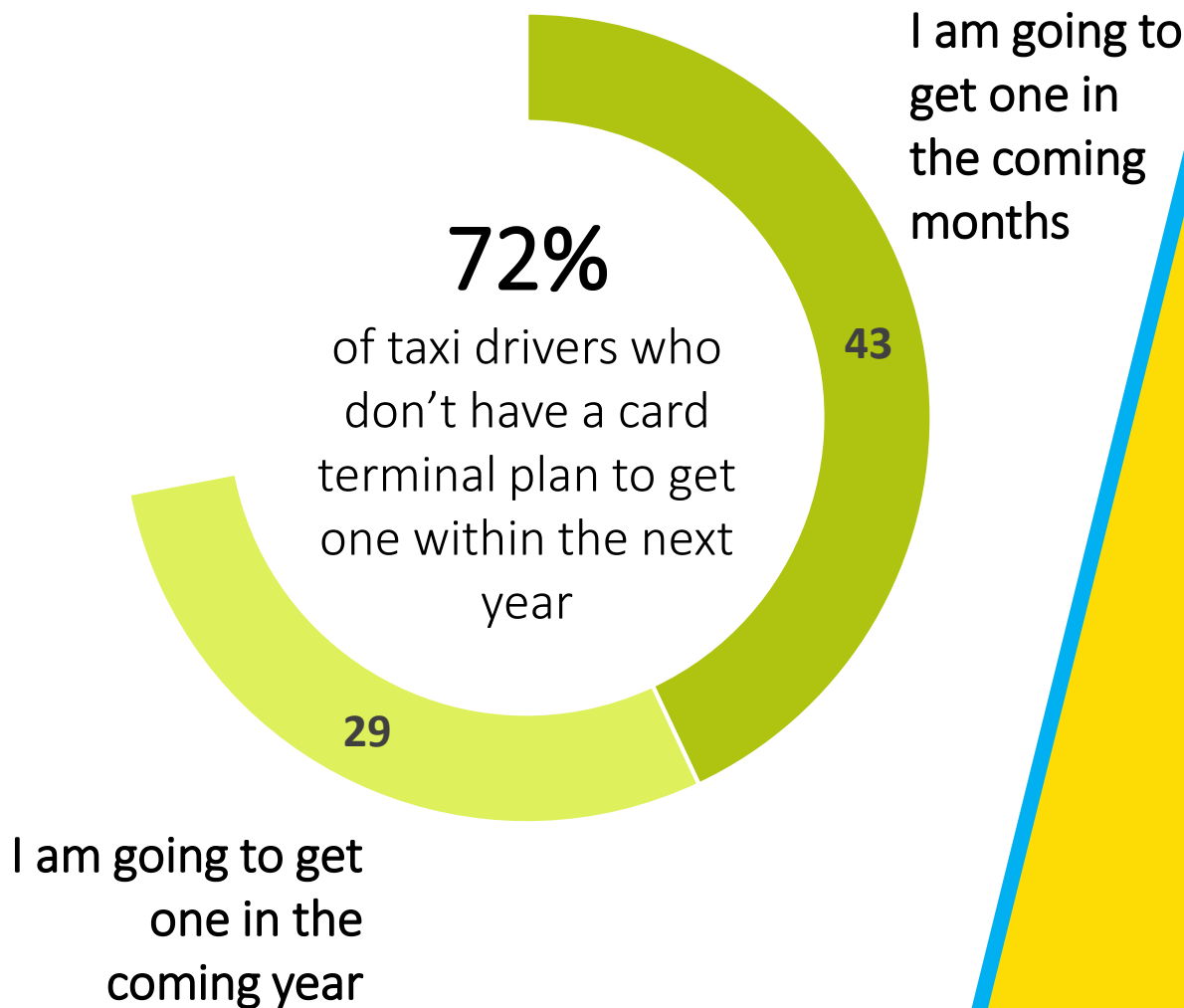
While we've seen a decline in the proportion in agreement that the risk of theft or violence is reduced when using cashless payments (-8% pts), there has been an increase in the proportion who acknowledge that most customers now want to pay with cards (+5% pts).

Attitudes towards cashless payments

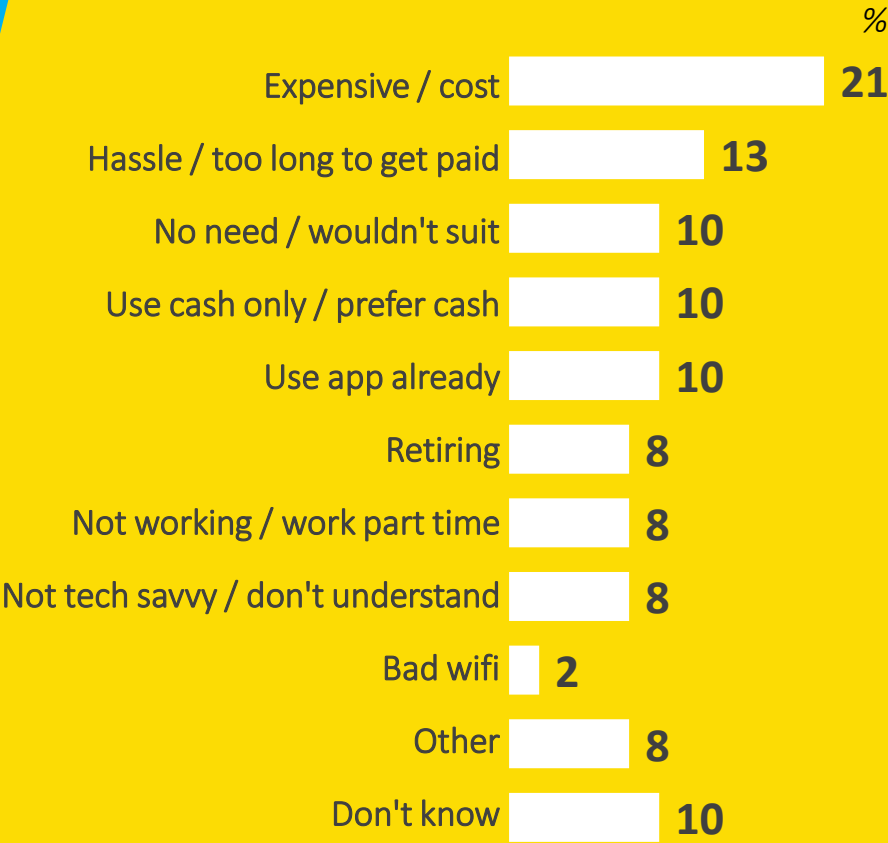
	All Drivers	Age			Region		Area		Type of Driver		WAV Owner	
		Up to 50	51-65	65+	Dublin	Outside Dublin	Main City	Smaller towns	Any Owner	Rent	Yes	No
<i>Base:</i>	505	175	243	79	301	204	423	73	426	79	91	414
	%	%	%	%	%	%	%	%	%	%	%	%
Most customers now want to pay with cards for journeys	65	75	60	60	66	63	67	57	64	75	75	63
In the context of Covid, I feel safer accepting a credit/debit card/some form of cashless payment	65	70	63	60	65	66	65	68	63	75	65	65
The risk of theft or violence is reduced for SPSV drivers if using cashless payments	61	65	59	58	59	63	61	60	59	71	62	61

Younger drivers, those in main cities, taxi renters and those driving a WAT are the more inclined to agree that most customers want cashless payments. Overall, younger drivers and taxi renters are more inclined to agree with each of the three benefits of cashless payments listed.

Plan to get card terminal if don't have one



Reasons don't want one *(Base: 39* taxi drivers don't plan to get one)*



Of the 505 taxi drivers surveyed, 136 (27%) do not have a card terminal. However 72% of these taxi drivers who don't have a card terminal plan to get one in the next year. Meanwhile, among the few who don't plan on getting one/don't want one in their taxi, the expense is the most common reason given.

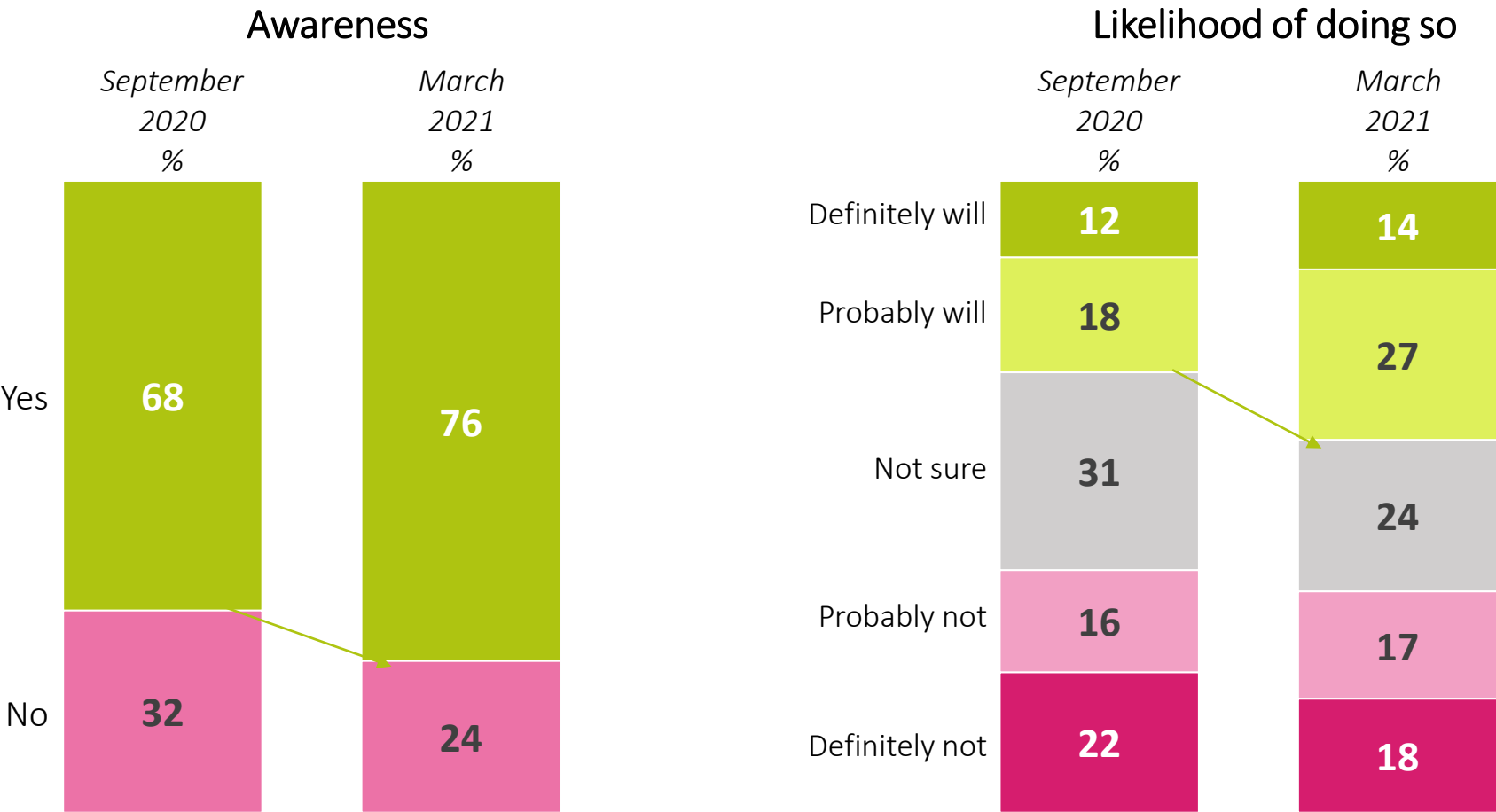


Licence Laws



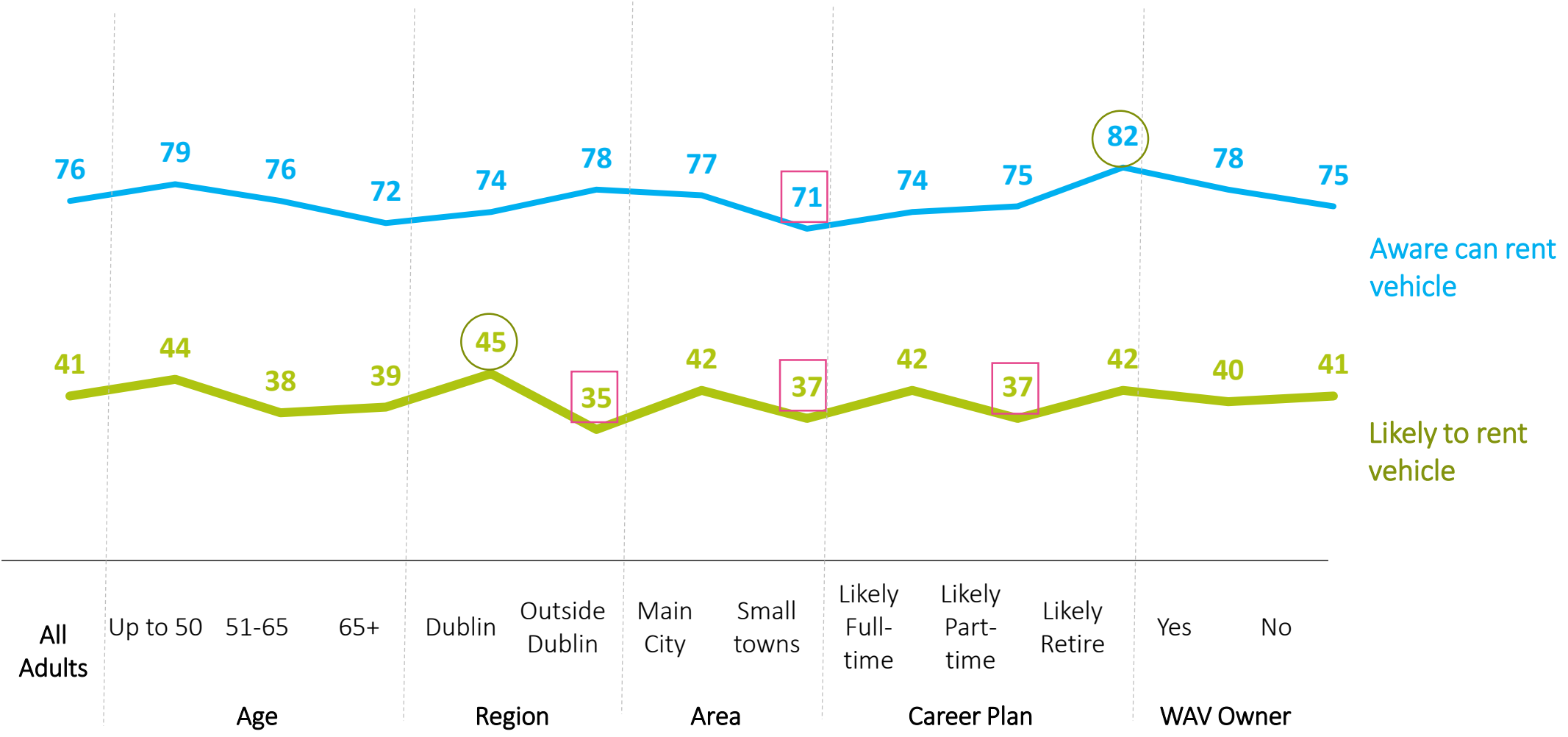
There has been an increase in awareness of the possibility to rent out a taxi once you retire among licence holders (+8% pts to 76%), as well as an increase in the likelihood to do so (+11pts to 41% definitely/probably will)

Awareness & likelihood of renting vehicle to someone else following retirement



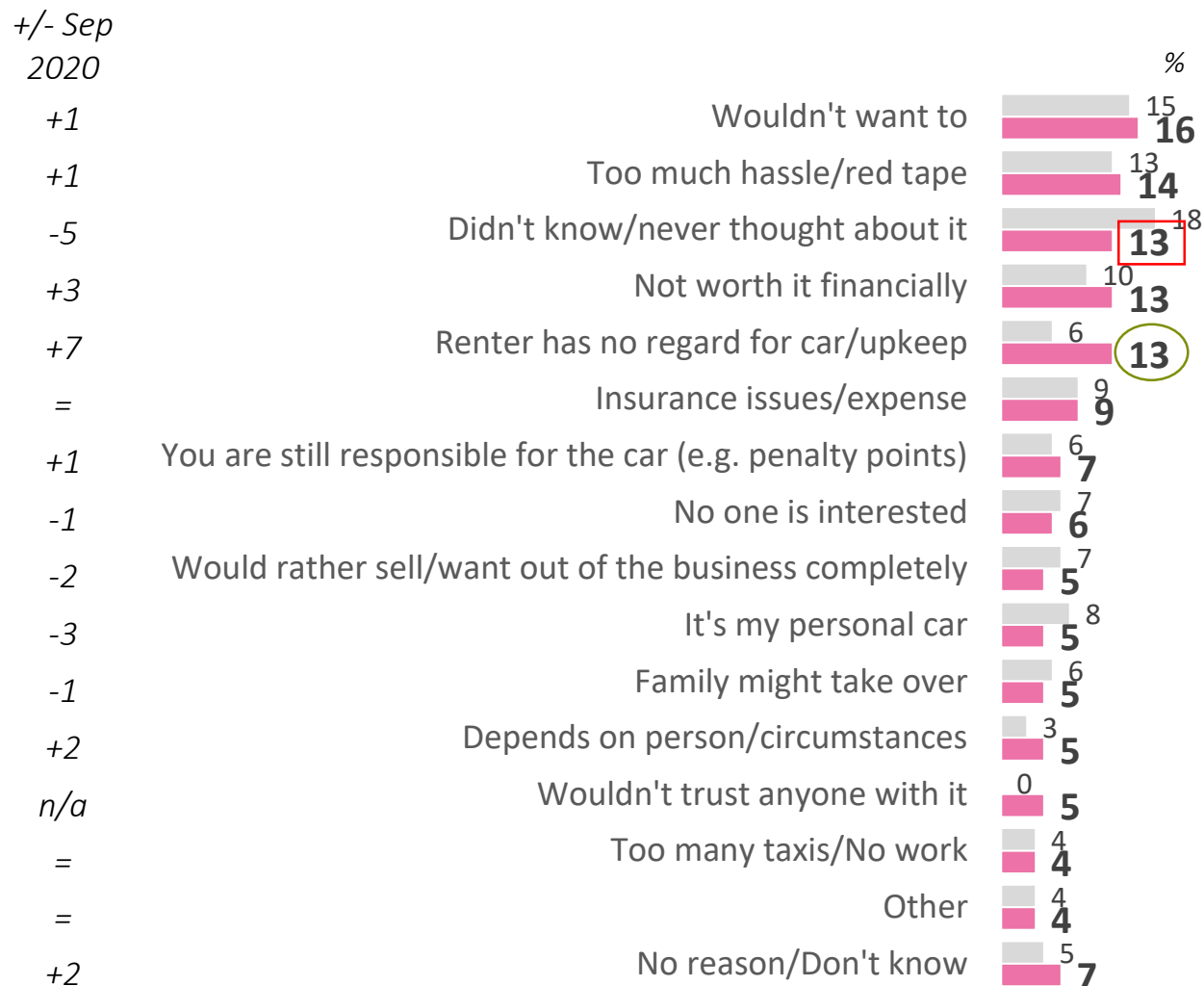
Higher proportion aware that they can rent out their licenced vehicles to someone else to operate when they stop driving (+8% pts), while more than 2 in 5 (41%) now indicate they definitely/probably will do so (+11% pts). Meanwhile, the proportion who definitely would not do so has shrunk (-4% pts vs Sept 2020).

Awareness by likelihood of renting licenced vehicle



Key differences this wave relate to region and area: those in smaller towns are less inclined to know about the possibility of renting their licenced vehicle and indeed less likely to suggest they would do so. Meanwhile, those in cities, Dublin in particular, are more inclined to suggest they definitely/probably will rent their vehicle to others when they stop driving. And while 82% of those likely to retire in the next 3 years are aware of the option, only 42% are likely to do so.

Reasons unlikely to rent licenced vehicle



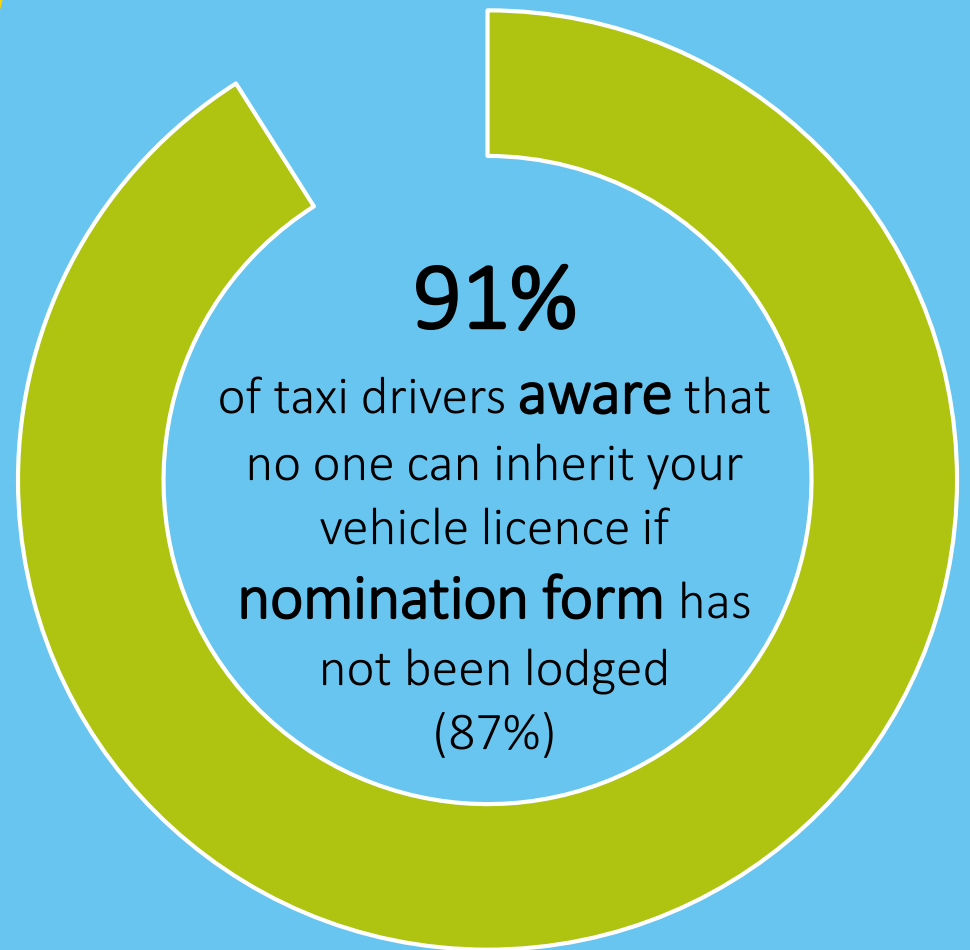
Age		
Up to 50	51-65	65+
73	134	45*
%	%	%
23	13	11
5	19	16
18	14	4
11	12	18
10	16	9
8	9	7
4	10	5
7	7	2
5	4	7
4	5	4
6	2	16
7	5	2
4	7	-
6	3	2
6	3	4
7	6	13

Fewer have never considered (-5% pts), while a higher proportion indicate that the renter would have no regard for the car/upkeep (+7% pts). Meanwhile, main reason differs by age: younger drivers more likely to suggest they wouldn't want to or had never thought about, whereas older drivers most likely to suggest it's not worth it financially, their family might take over or it would be too much hassle/red tape.

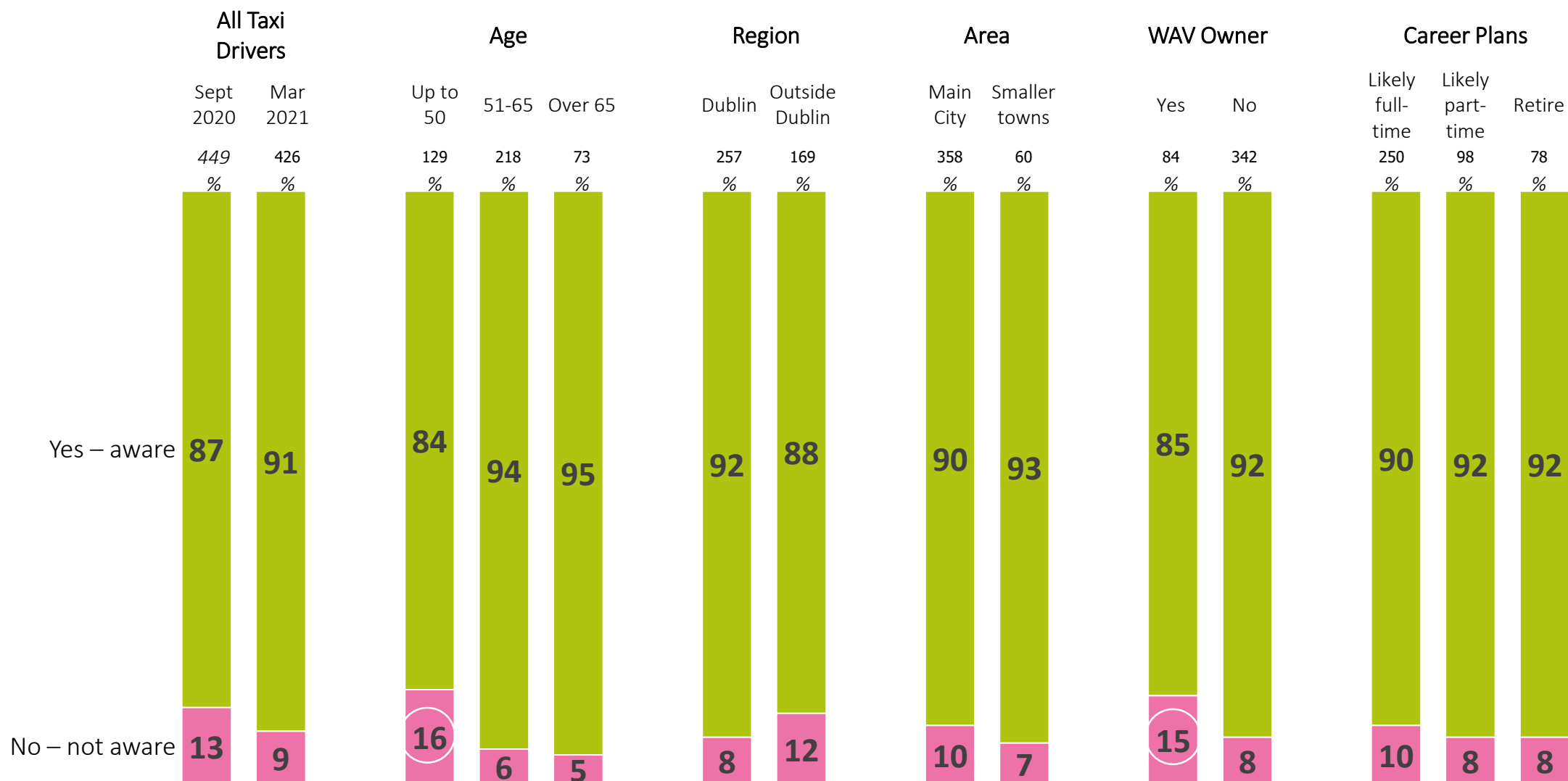
All others 2% or less

March 2021

*Caution: small base

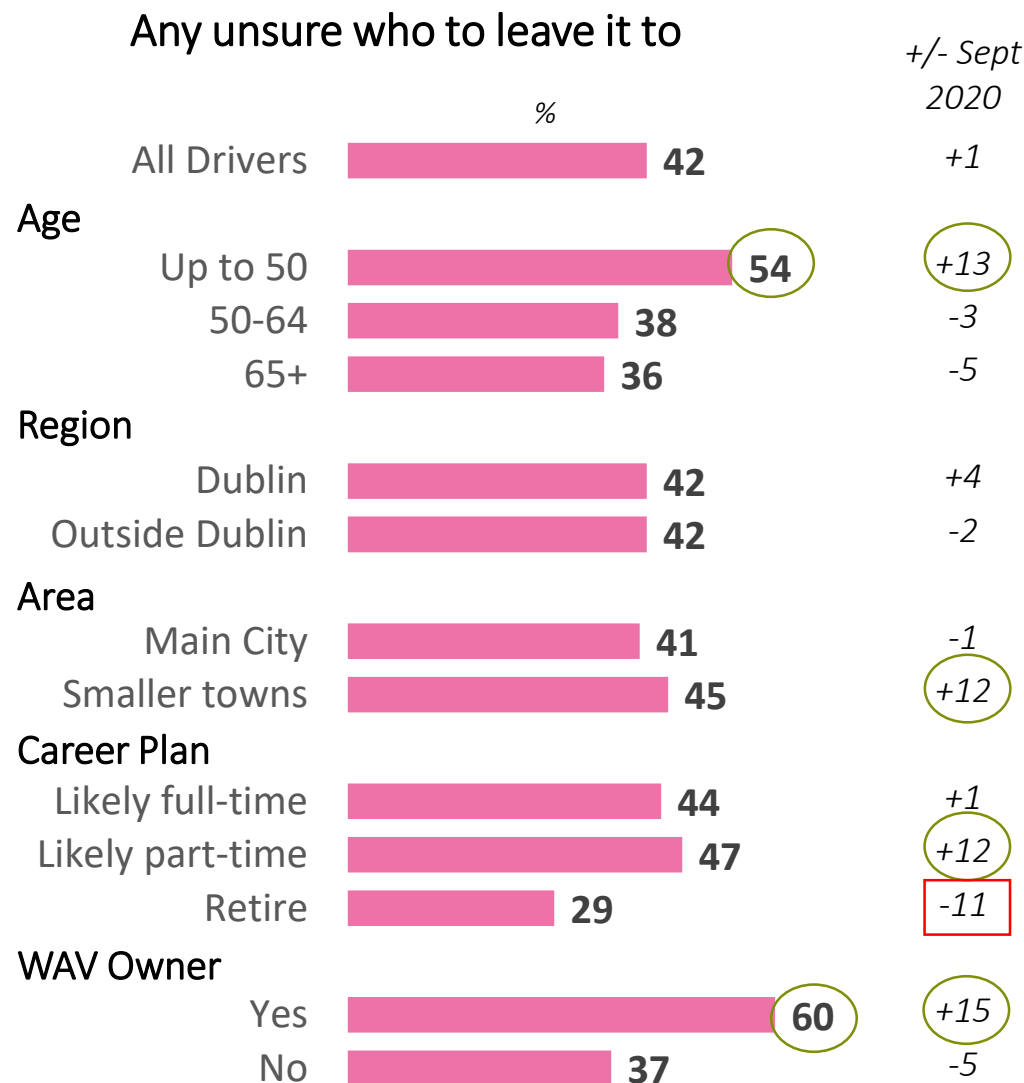
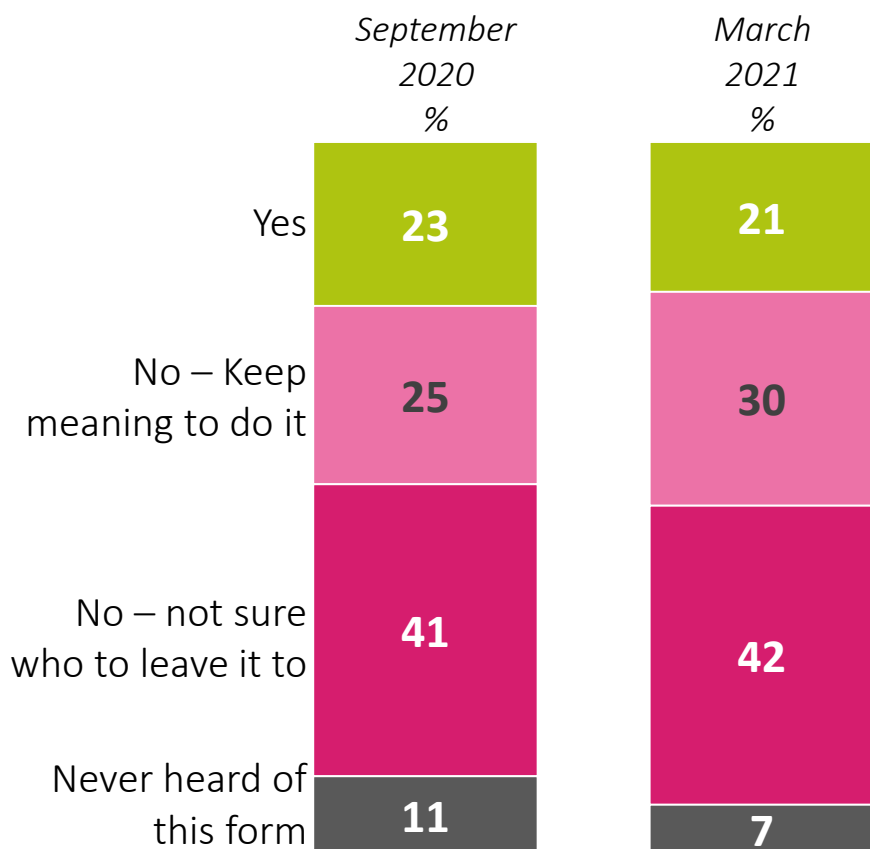


Awareness of need for Nomination Form



Marginal improvement in awareness of the need for a nomination form: younger drivers and those driving a WAT the least inclined to be aware of it.

Incidence of having completed nomination form



Little change in proportion who have completed the form, with a marginally higher proportion suggesting that they keep meaning to do it (+5% pts). 2 in 5 (42%) remain unsure as to who to leave their taxi to, rising to more than half of those under 50 (54%) and 3 in 5 WAT drivers (60%).



Key findings

Key Findings March 2021

IMPACT OF COVID-19

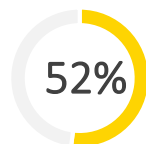
While just over 9 in 10 (92%) **have stopped working at some point** since COVID-19...



- **Very few of those not working have any date for returning to work**, with many suggesting when vaccines have been rolled out or when restrictions are lifted.
- **Fewer suggesting they will retire** in the next three years this wave (-4% pts), but the **move is more towards part-time work than full-time** work.



More than 9 in 10 (95%) of **working taxi drivers are less busy** than pre-COVID.

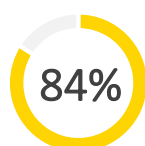


...of drivers are **not working** at present



Almost all (96%) taxi drivers are **earning less** now than they were pre-COVID. While **on average**, they are **earning 68% less** (up from 61% in Sept 2020)

- **Average loss of earnings increases with age**: on average, over 65s are down 74% on their pre-COVID income. And remember...



More than 4 in 5 (84%) over 65s have **not availed of any Government supports** since the pandemic began.

COVID MEASURES IMPLEMENTED

- **Higher proportion** of taxi drivers have **implemented any COVID measures** this wave than seen in September (+10% pts to 84%).

On average, taxi drivers feel that **vast majority of customers wear face coverings**...(+27% pts)

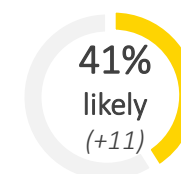
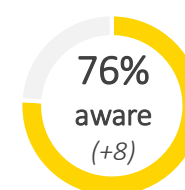


More than 4 in 5 (84%) taxi drivers **offer some form of cashless payment** (+6% pts)

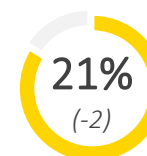
- **72%** of those **without a card terminal plan on getting one** in the **next year**.

LICENCING LAWS

When it comes to the option of **renting out taxi when retired**...



9 in 10 (91%) **aware of the need for a nomination form** (+4)



Have completed and **lodged their nomination form**...

- While **30%** (+5% pts) **keep meaning to** do it.

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.

