



Údarás Náisiúnta Iompair
National Transport Authority

COVID Impact Research **Wave 4** - Taxi Drivers

Quantitative Survey
October 2021

Data gathered during period of
further easing of Government
restrictions in line with rollout of
vaccination programme.





Introduction

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- This report details the findings of a representative survey of taxi drivers in Ireland.
- This is the fourth iteration of this study, and was, as previously, undertaken by telephone, with a list of drivers provided by the Taxi Regulator for interview.
- A survey of taxi consumers has been undertaken online in tandem, covering a similar topic and aimed at understanding the impact COVID-19 has had on taxi usage and attitudes towards the safety of using taxis.
- Where possible, findings have been compared with previous waves of this study, and with previous iterations of the NTA Taxi Fare Review study.



Objectives

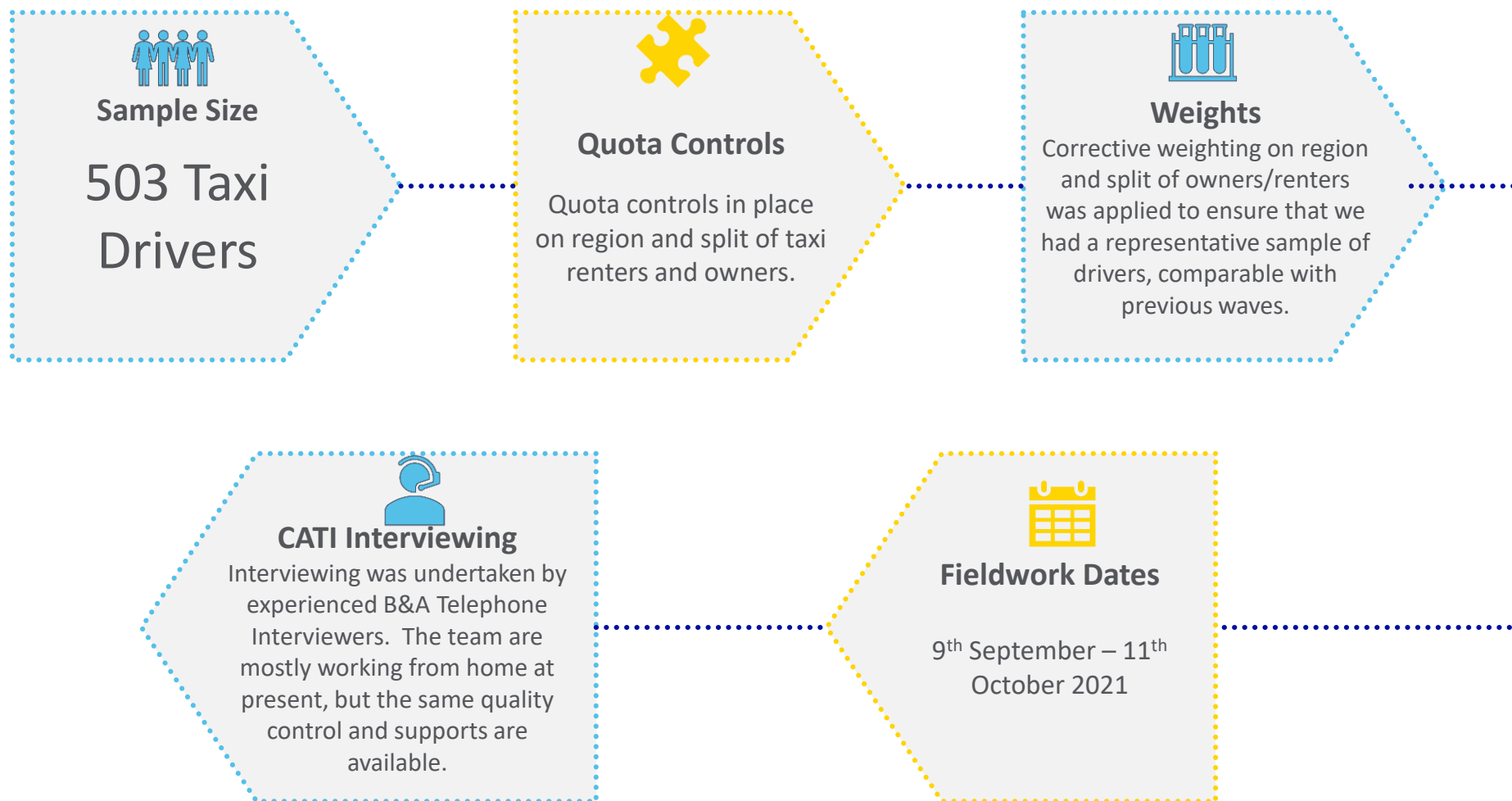
- This research aimed to understand:
 - ❖ The impact COVID-19 is having on taxi drivers
 - ❖ The COVID safety measures drivers have introduced in their vehicles
 - ❖ Incidence of and openness to the use of cashless payments in taxis
 - ❖ Understanding and planning in place to inheriting a licences
- 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 May 2021?

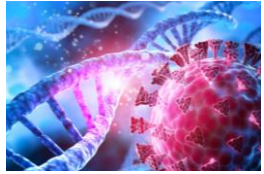


Methodology

A representative survey of taxi drivers in Ireland.



Research Timeline



Mar 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. **Strict lockdown measures.**

Jun 2020

Roadmap to reopening the country is underway: **shopping centres & restaurants reopen** under strict guidelines.

Jul 2020

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

Aug 2020

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

Sep 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** (only outdoor dining allowed). On 21st Oct, country moves to **Level 5 for 6 weeks** (until 1st Dec) with all non-essential retail and restaurants closing.



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 & working from home encouraged. Non-essential retail & professional services back

Jun 2021

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

Jul-Aug 2021

Indoor dining for those vaccinated opened on 26th July, while further **test events** (e.g. outdoor music festival) were held in July also. At the end of August it was announced that almost all restrictions would be lifted on October 22nd

Sep-Oct 2021

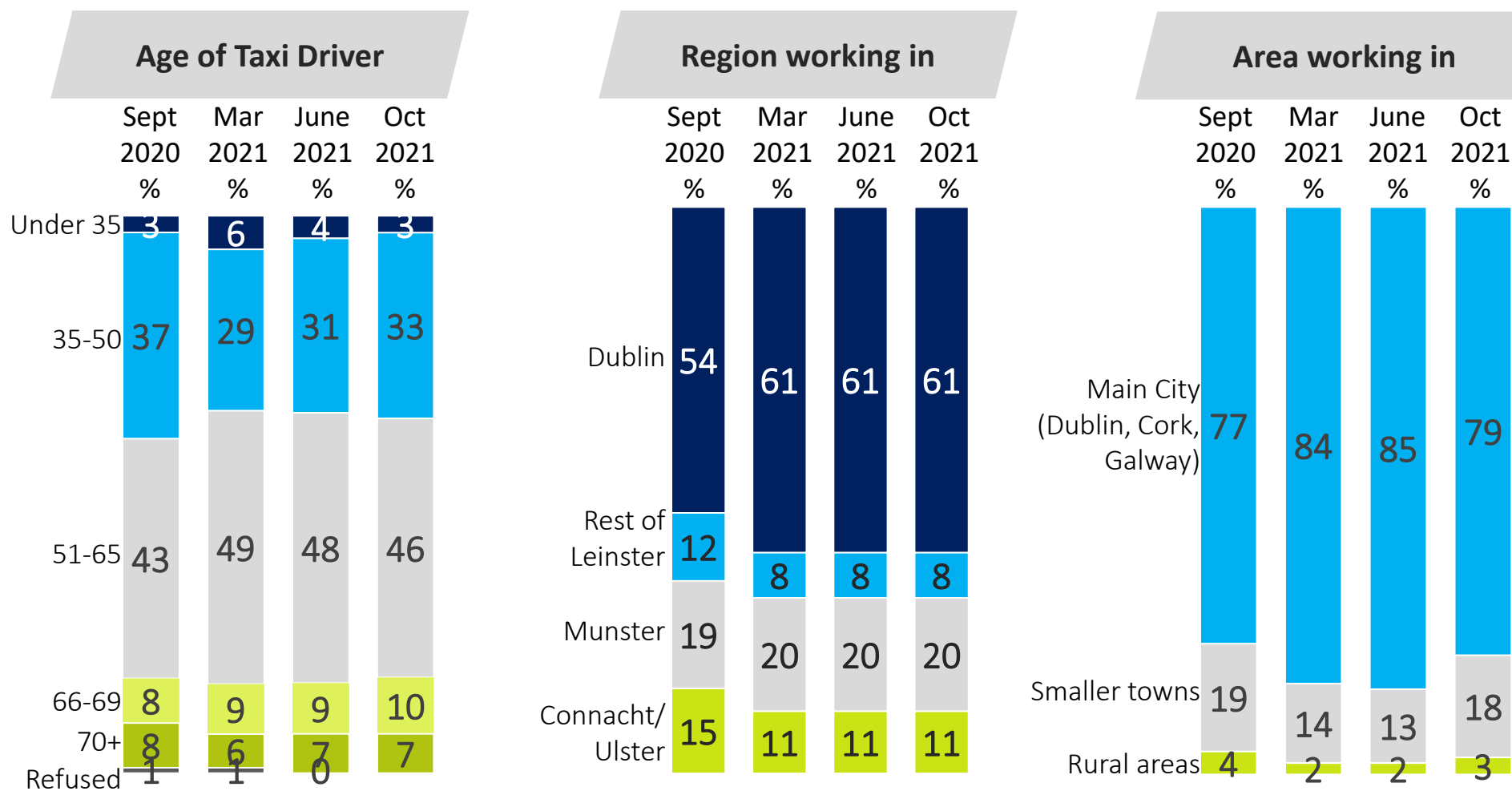
Limited restrictions remain in place as masks continue to be a requirement in crowded spaces. Important to note that fieldwork finished on 11th October before further changes to restrictions on 22nd October.



Profile of Sample

Profile of taxi drivers interviewed

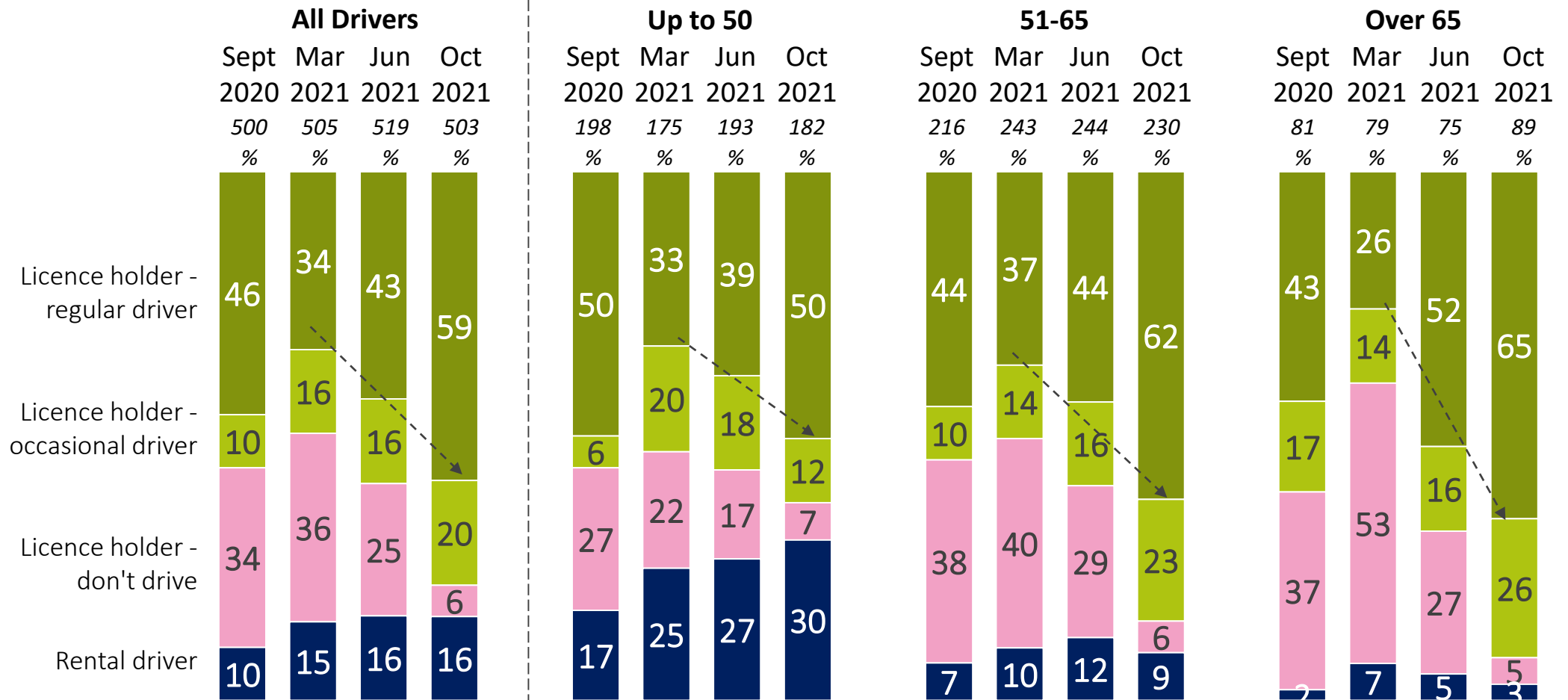
Base: 503 taxi drivers



Similar sample interviewed to that of previous waves. Fewer main city drivers in comparison with March and June, but similar to around this time last year.

Status of employment

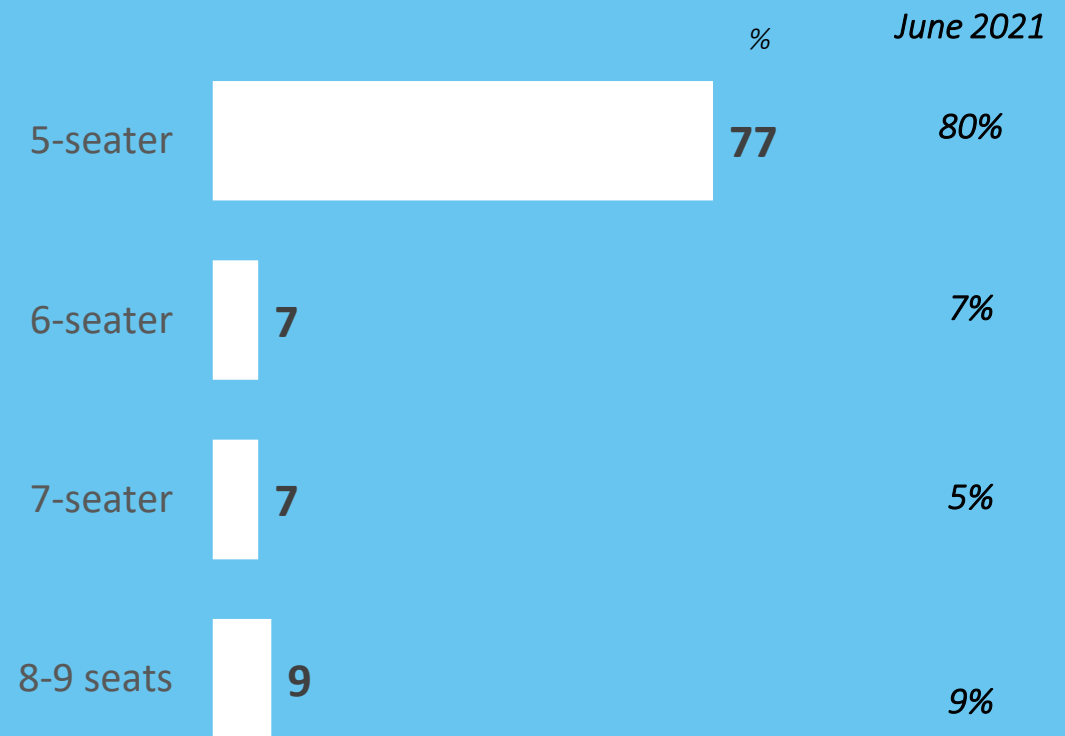
Base: 503 taxi drivers



Steady increase in the proportion of licence holders who are regular drivers over the past two waves: from 43% to 59% this wave. Increases noted across the board in terms of age groups, but most pronounced among the over 65s, who were least inclined to have been working in March 2021.



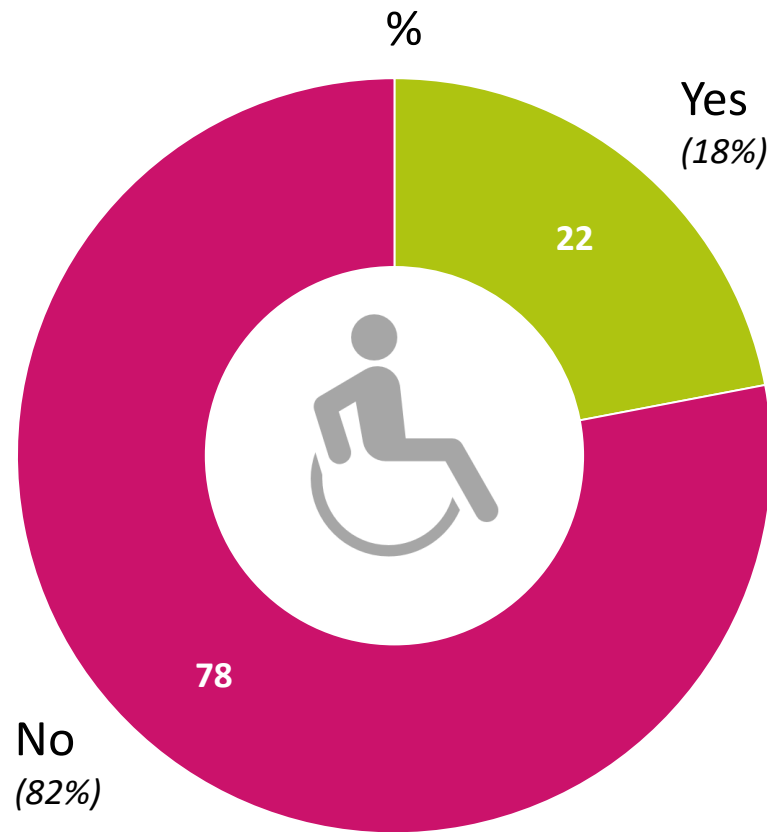
Three quarters driving a 5 seater vehicle, with little difference in comparison with the previous wave.



• Q. How many seats does the vehicle you operate have?

Wheelchair Accessible

Base: 423 licence holders



Any Yes %



Just over a fifth of licence holders drive a wheelchair accessible vehicle, rising to 38% amongst those aged up to 50.



15 years remains the average length of time taxi drivers have been working.

	Sep 2020 %	Mar 2021 %	Jun 2021 %	Oct 2021 %
Less than 6 years	19	20	18	20
From 6 to 13 years	19	22	19	17
From 13 to 16 years	20	16	16	20
From 16 to 21 years	20	19	25	19
21 years or more	20	22	21	23



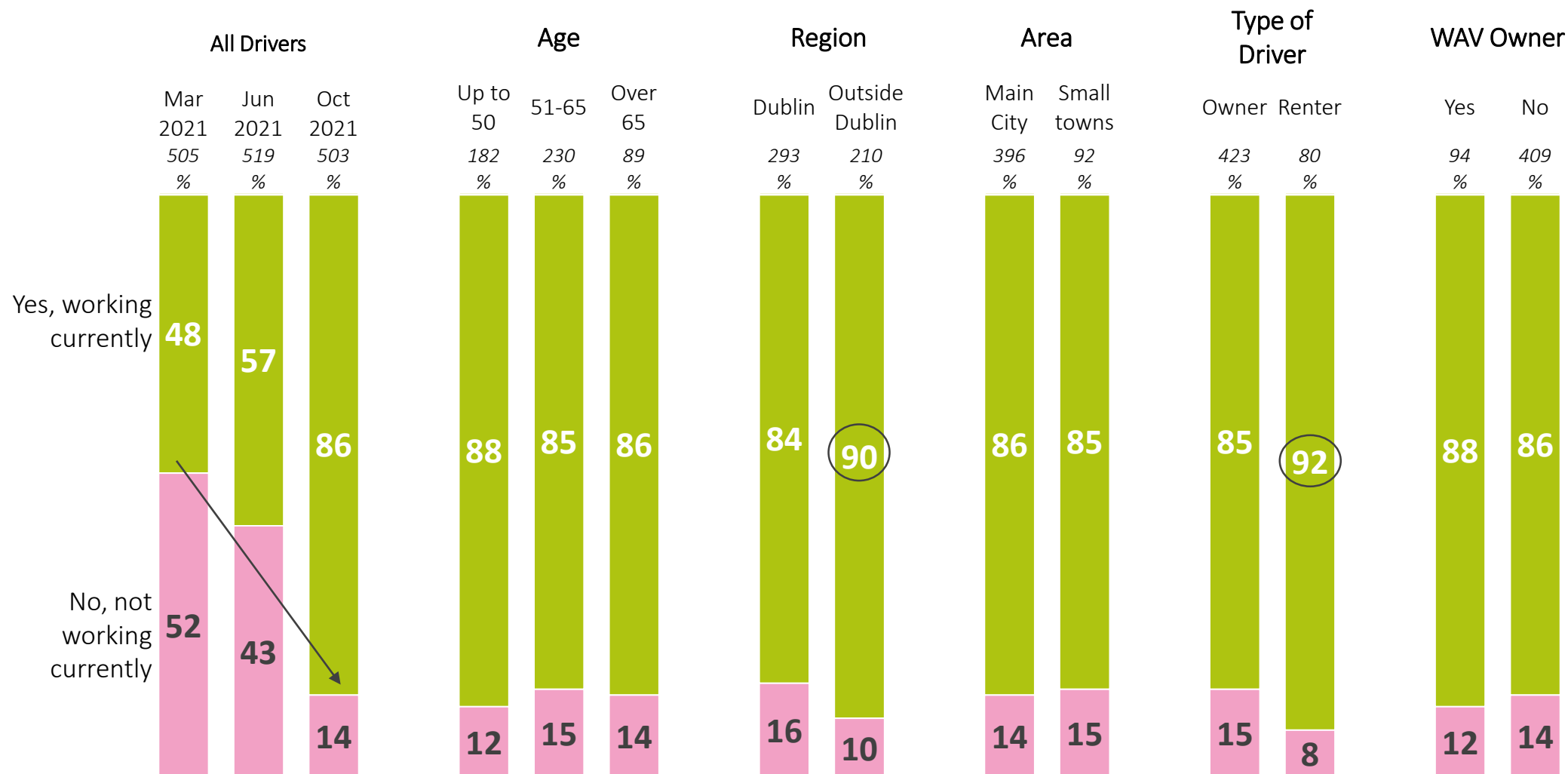
**Impact of COVID-19
on income**



Overall, the vast majority (90%) have stopped working at some point since the COVID restrictions were introduced. Those driving a Wheelchair Accessible Vehicle are less inclined than others to have stopped working.

Who is working currently? (Fieldwork: 9th Sept - 11th Oct)

Base: 503 taxi drivers

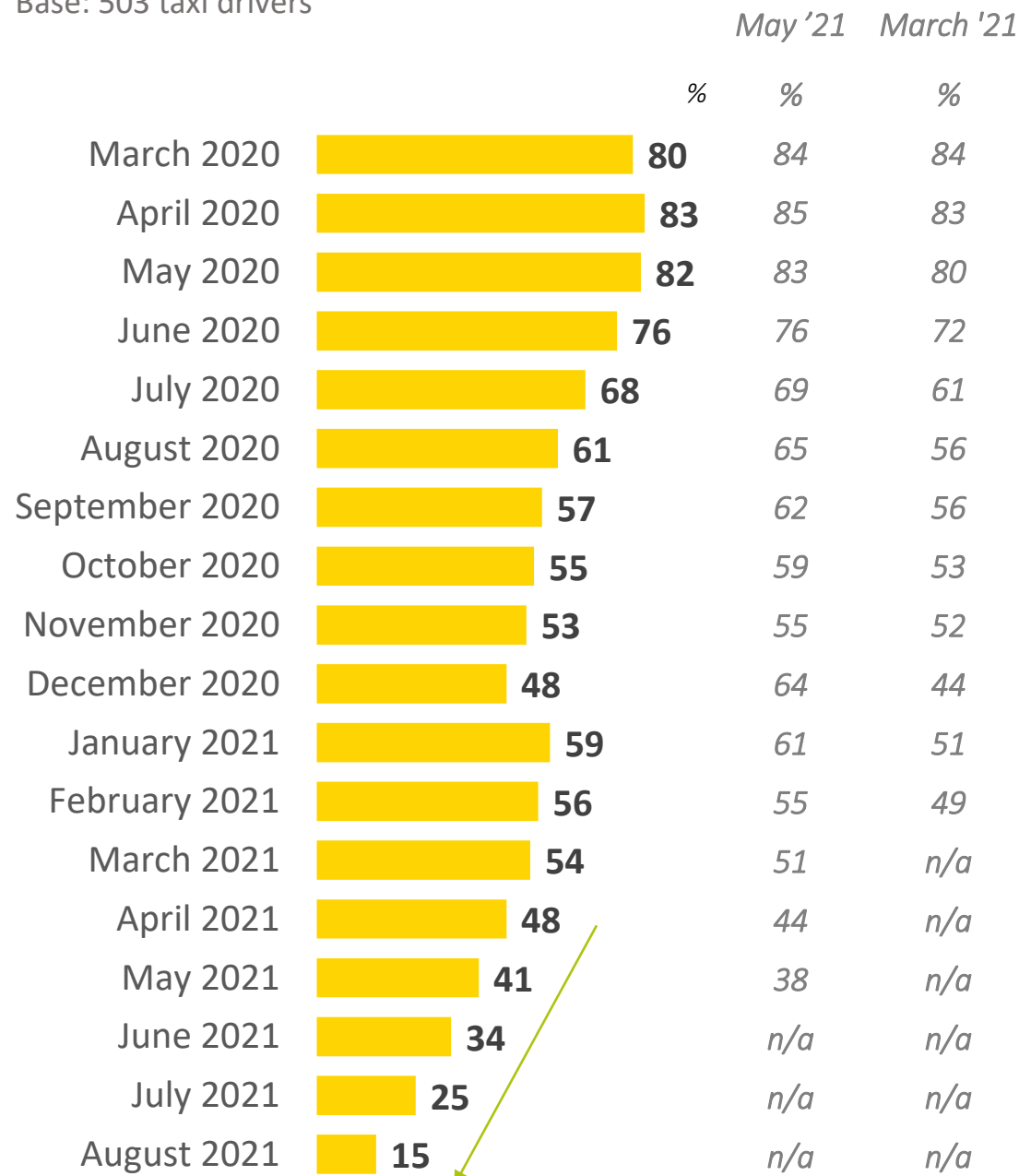


Sharp increase in proportion who are currently working in October: +29% points vs June 2021. Highest outside Dublin and among taxi Renters, although difference is marginal.

*Caution: small base

Months not working

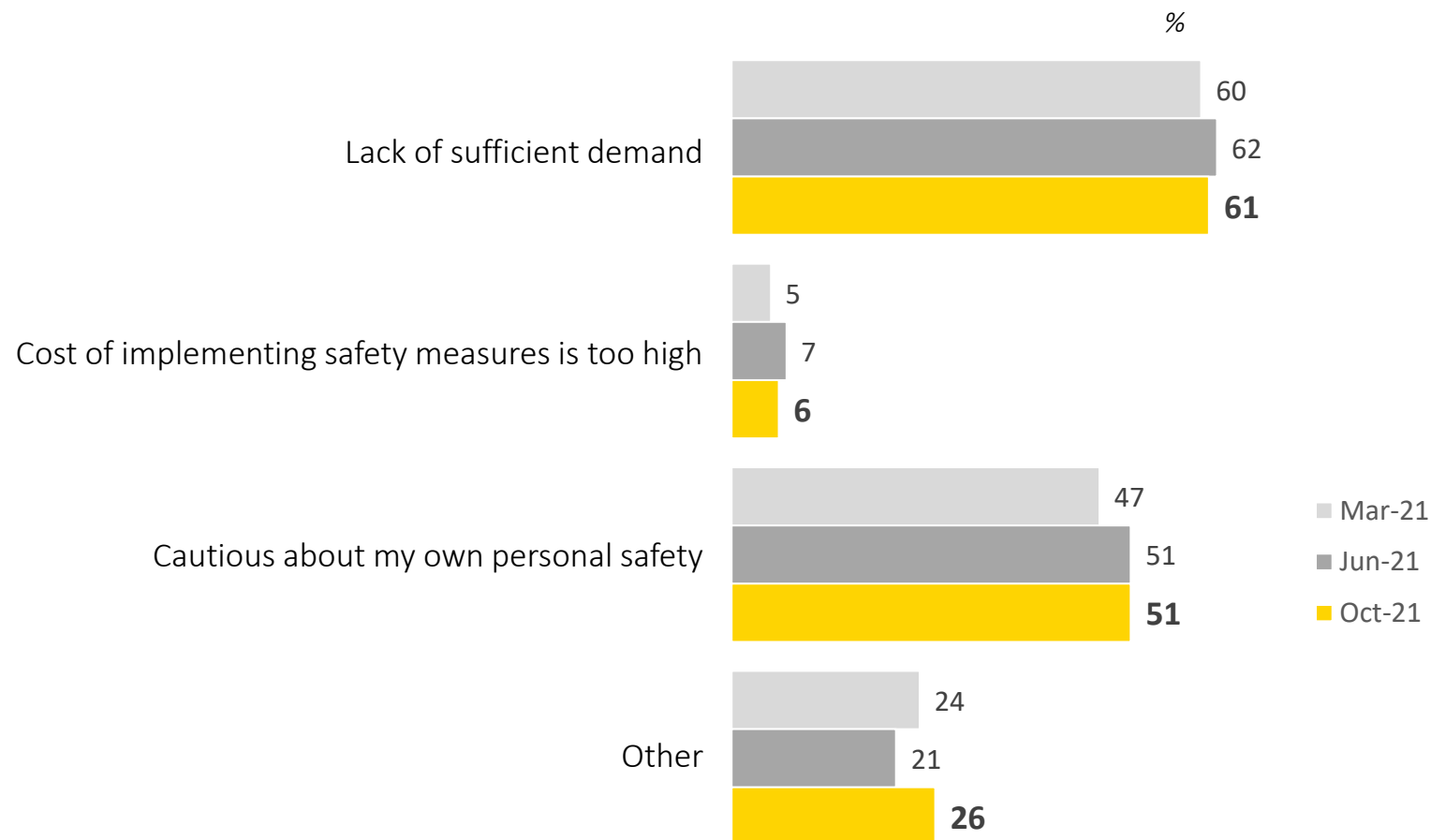
Base: 503 taxi drivers



Since the Level 5 lockdown ended in April, there has been a steady decline in the proportion of drivers not working: down to just 15% in August 2021.

Why stopped working

Base: 452 taxi drivers who stopped working at some point since COVID

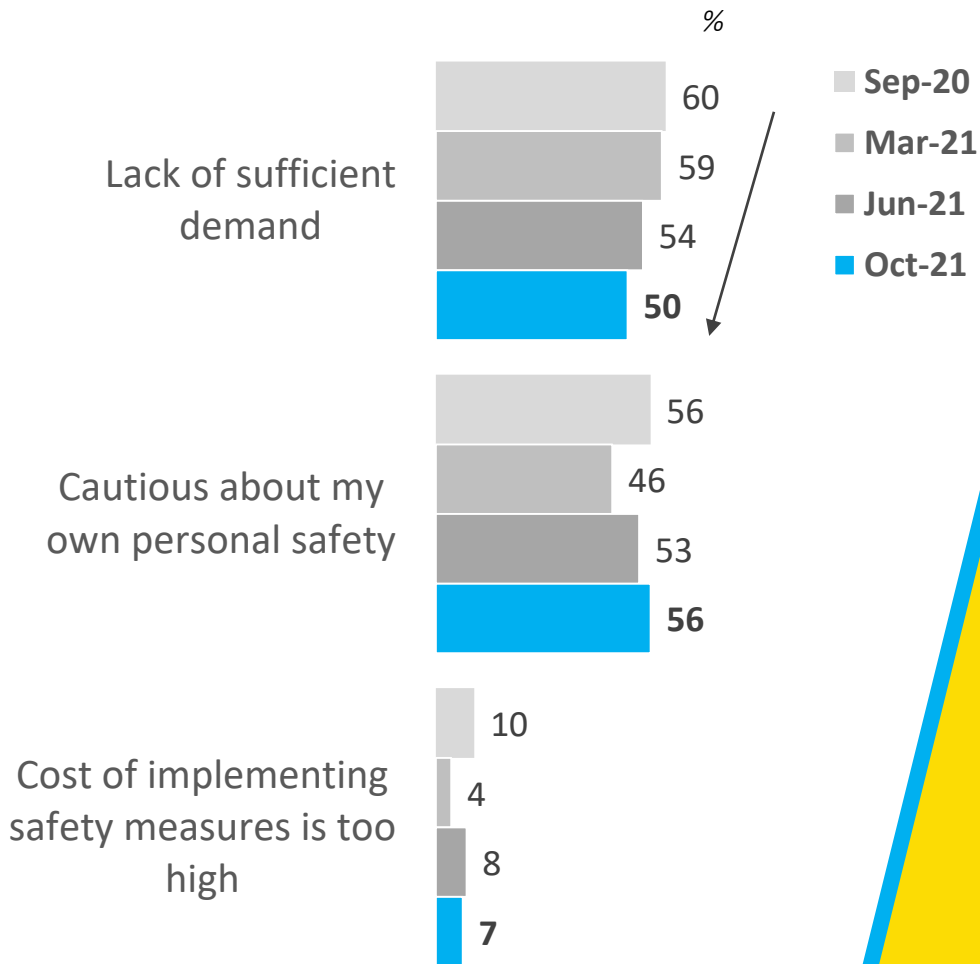


Similar pattern emerges to that of June 2021 with the majority mentioning lack of sufficient demand and/or caution about own personal safety.

**Caution: small base*

Reasons for not returning to work

Base: 71 taxi drivers not working at present



Among those not working at present, perceived lack of demand is declining whereas caution about personal safety is increasing in terms of reasons for not returning to work.

When plan on returning to work

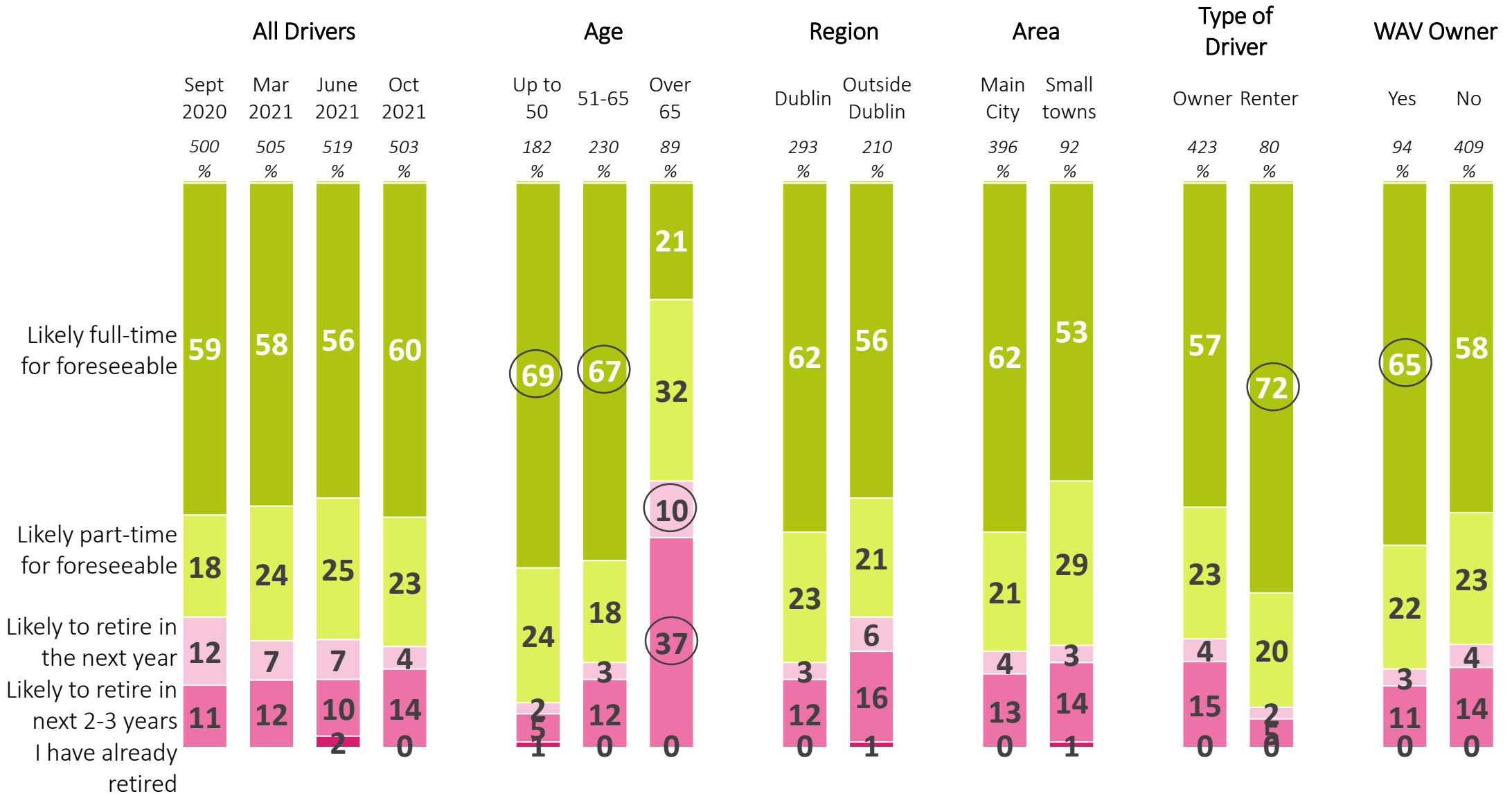
Base: 71 taxi drivers not working at present

March '21	May '21		
%	%		%
n/a	12	Specific date/month	38
n/a	8	Going back this week/next 2 weeks	16
24	26	When hospitality (bars/restaurants) are open	14
15	20	When I am vaccinated	7
n/a	14	When normality returns	4
n/a	4	Will not be going back	0
n/a	1	Once taxi docs/passport docs sorted	0
n/a	1	Once car is fixed	0
n/a	2	Other	12
31	22	Not sure/no idea yet	26

Those not working at present are much more likely to have a plan in place as to when they will return to work in October than they were in May: 38% have a specific timeline in mind, while 16% are going back within the next fortnight.

Future plans for career

Base: 503 taxi drivers



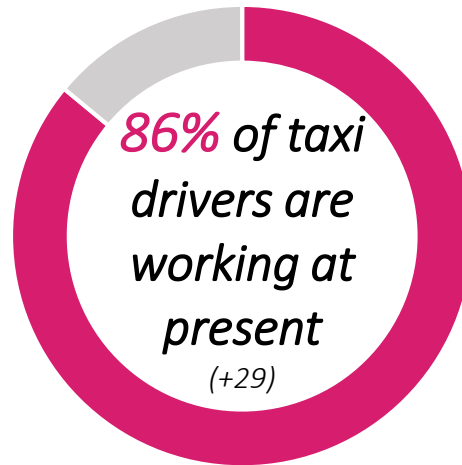
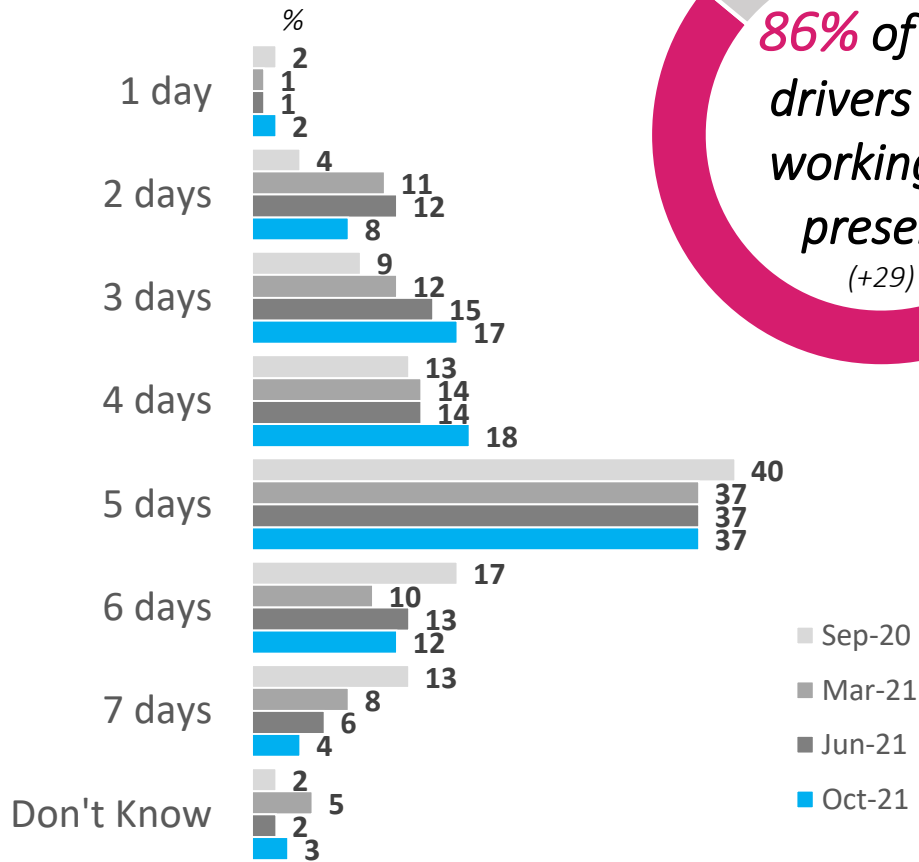
Younger drivers, taxi renters and those driving a WAV are the more inclined to indicate they will likely work full-time for the foreseeable, while just under half of those over 65 plan on retiring within the next three years.

*Caution: small base

Current working hours

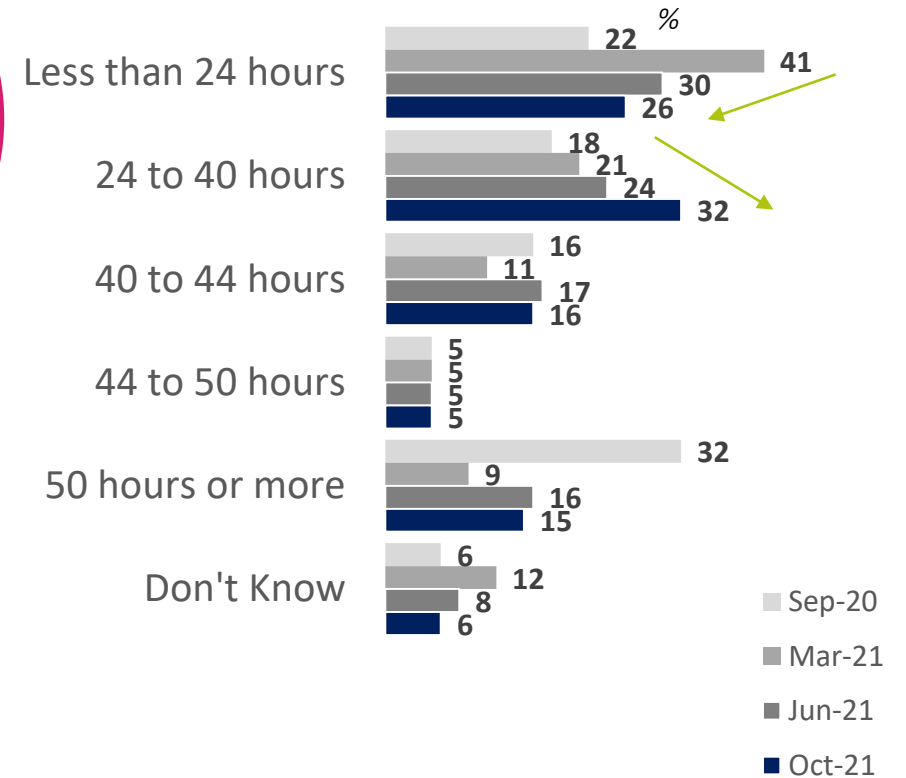
Base: 432 working taxi drivers

Number of days working



Average no. of days Oct '21	4.4 days
Average no. of days Jun '21	4.4 days
Average no. of days Mar '21	4.5 days
Average no. of days Sep '20	4.9 days

Number of hours working

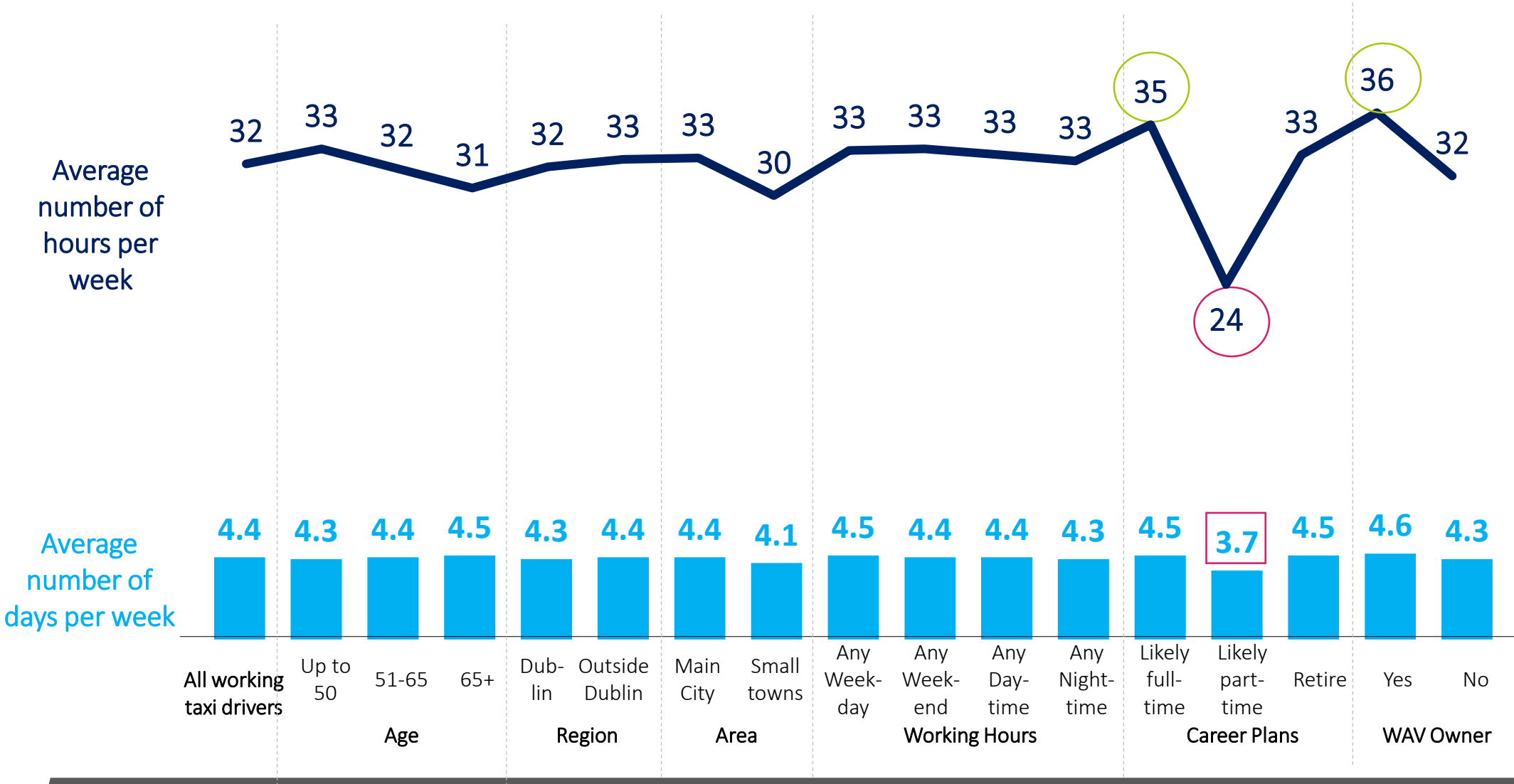


Average no. of hours Oct '21	32 hours
Average no. of hours Jun '21	32 hours
Average no. of hours Mar '21	28 hours
Average no. of hours Sep '20	38 hours

Little change in days working in comparison with previous wave, although we do see fewer working less than 24 hours per week and more working 24-40 hours.

Average working hours x driver profile

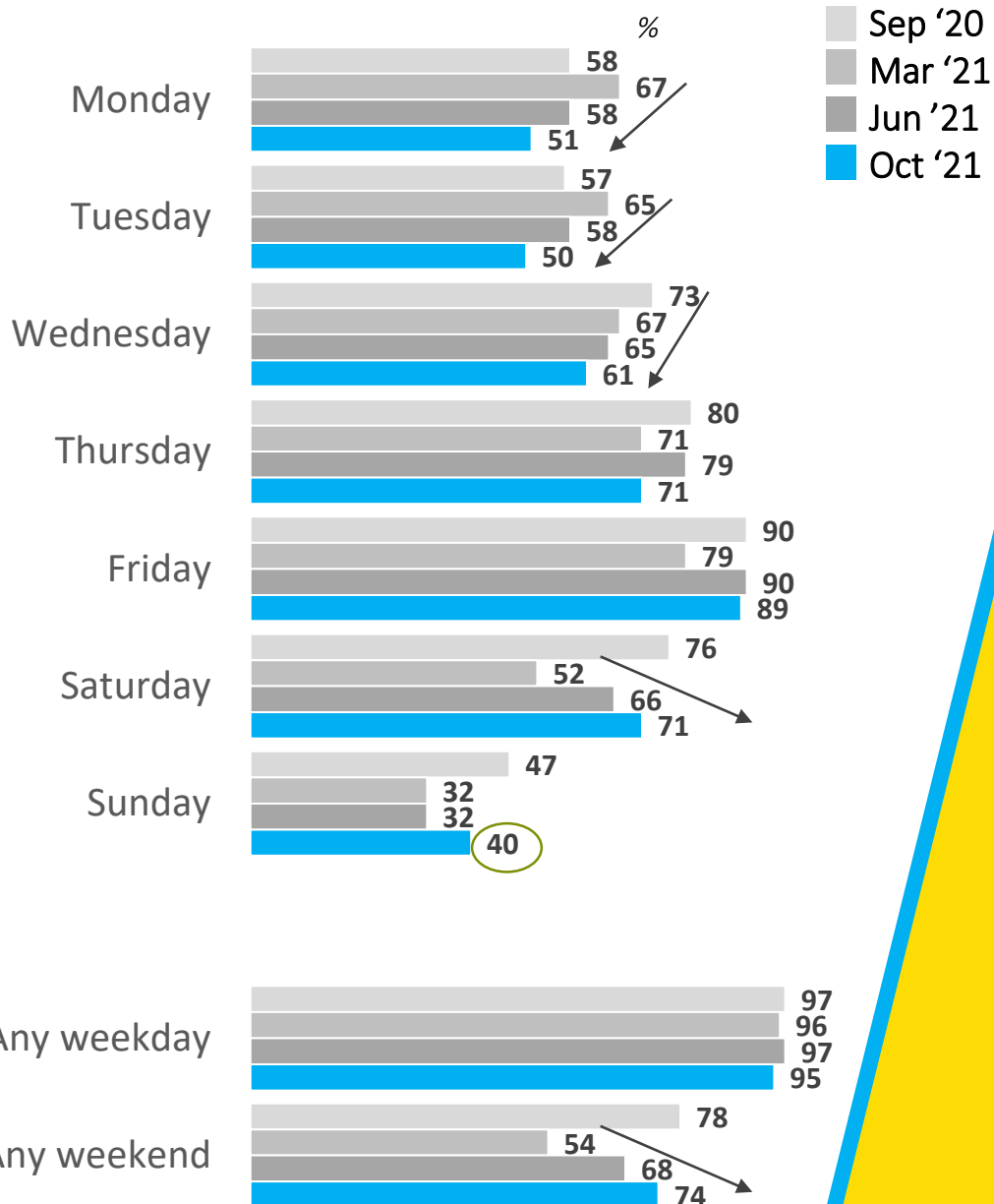
Base: 432 working taxi drivers



Similar pattern to the previous wave, as likely part time workers for the foreseeable are inclined to be working fewer hours, while full time drivers and those driving a WAT are working a higher number on average.

Days typically work

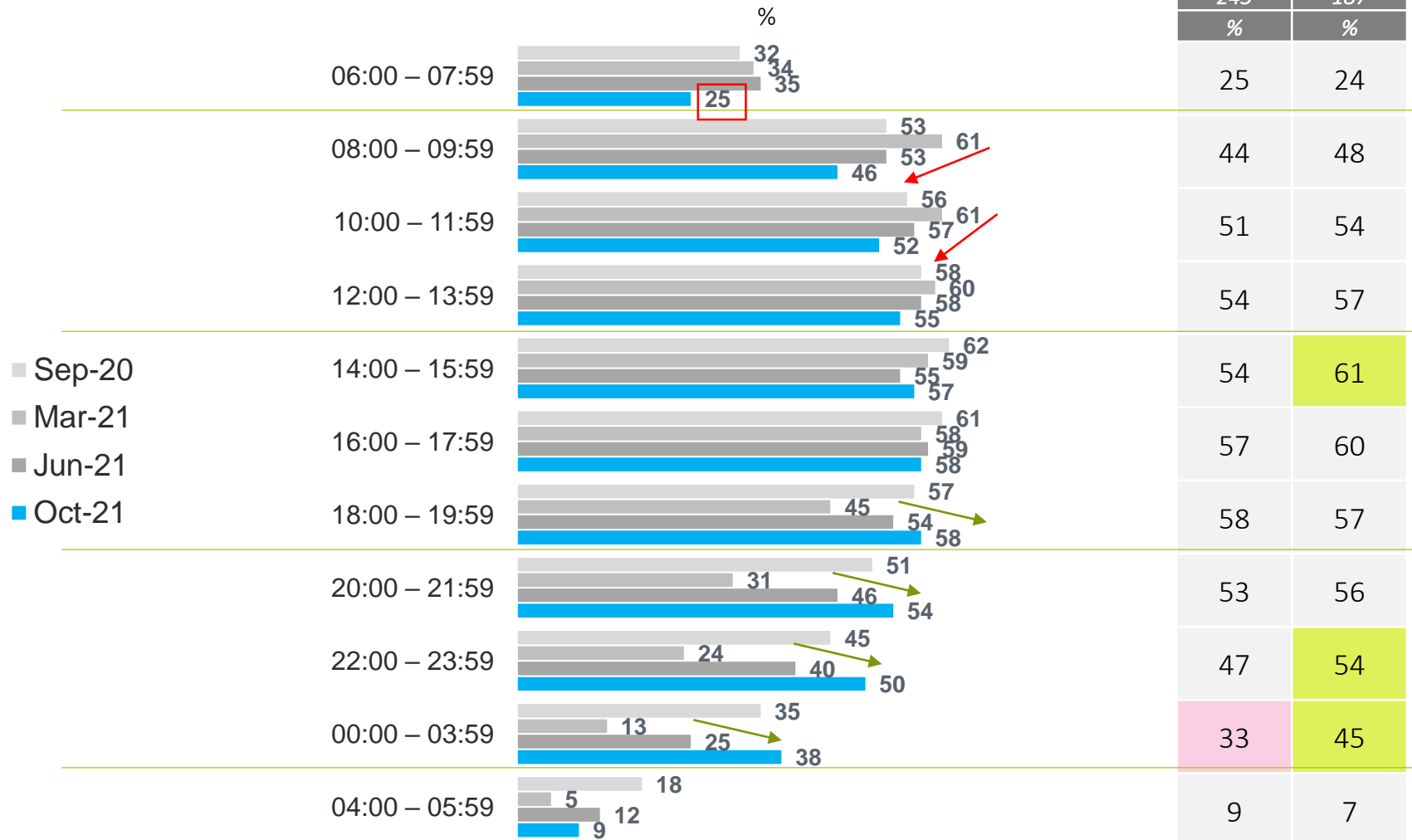
Base: 432 working taxi drivers



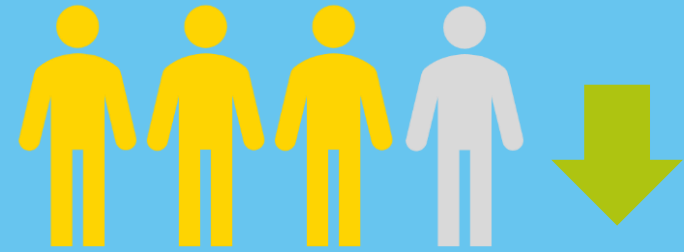
There appears to have been a shift away from working Monday-Wednesday, with higher proportions working on Saturday and Sunday. Percentage doing any weekend work has increased over the past two waves (since last Level 5 lockdown).

Time normally work

Base: 432 working taxi drivers



Shift away from working early mornings towards evening and night work evident over the past two waves: since the end of the Level 5 lockdown. Fewer drivers in Dublin working between 12am and 4am.

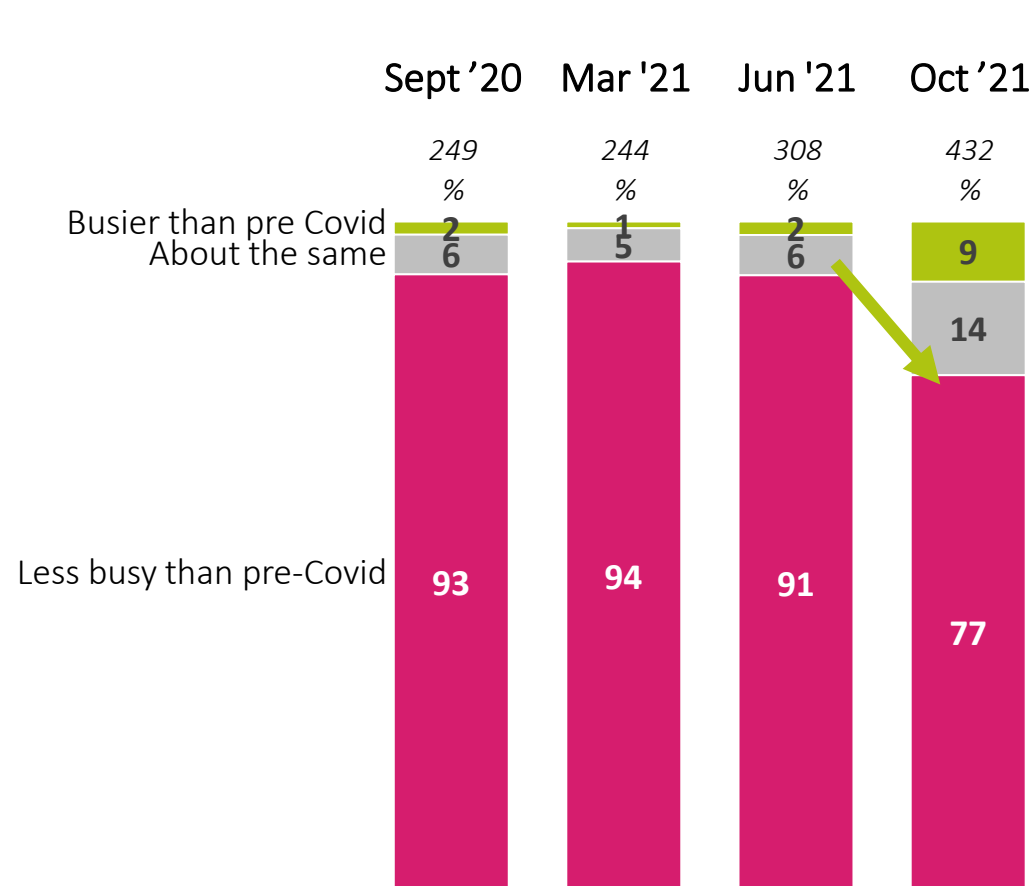


3 in 4 (77%) of working
taxi drivers are less
busy than they were
pre-COVID.

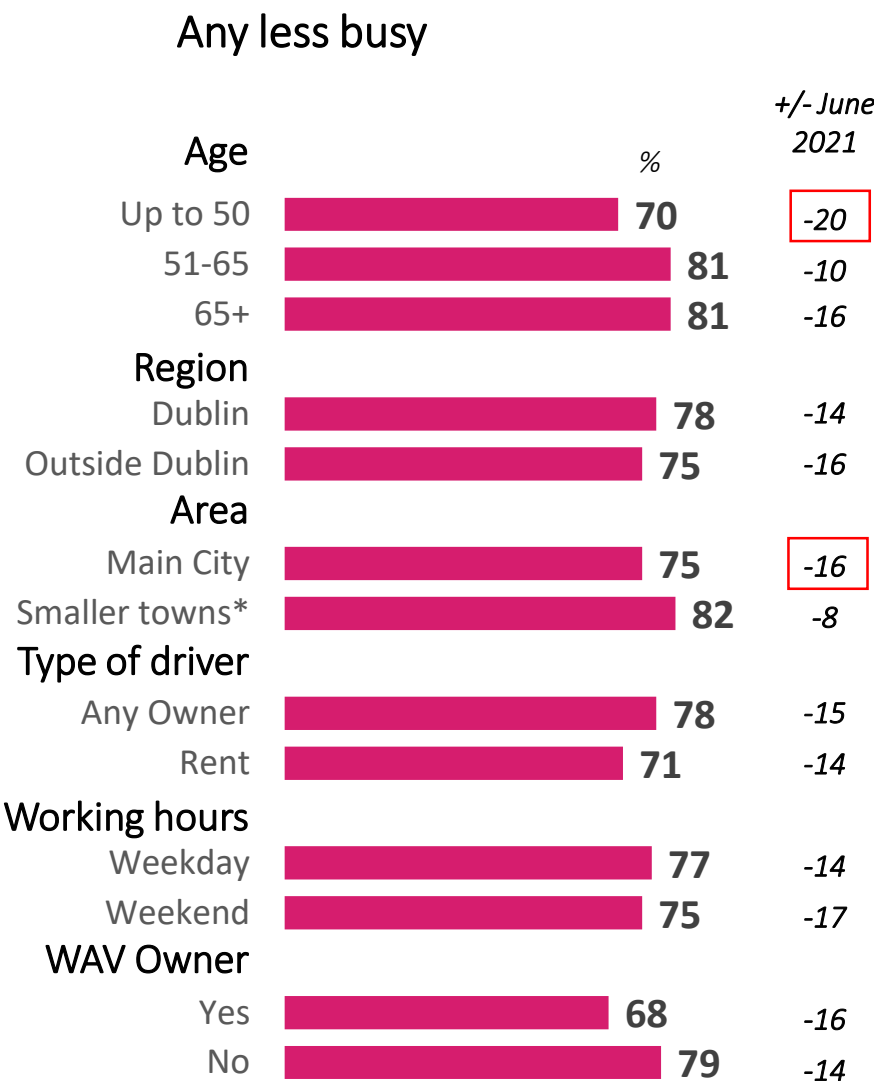
(-14% pts vs June 2021)

Demand for taxi services compared with pre COVID

Base: 432 working taxi drivers

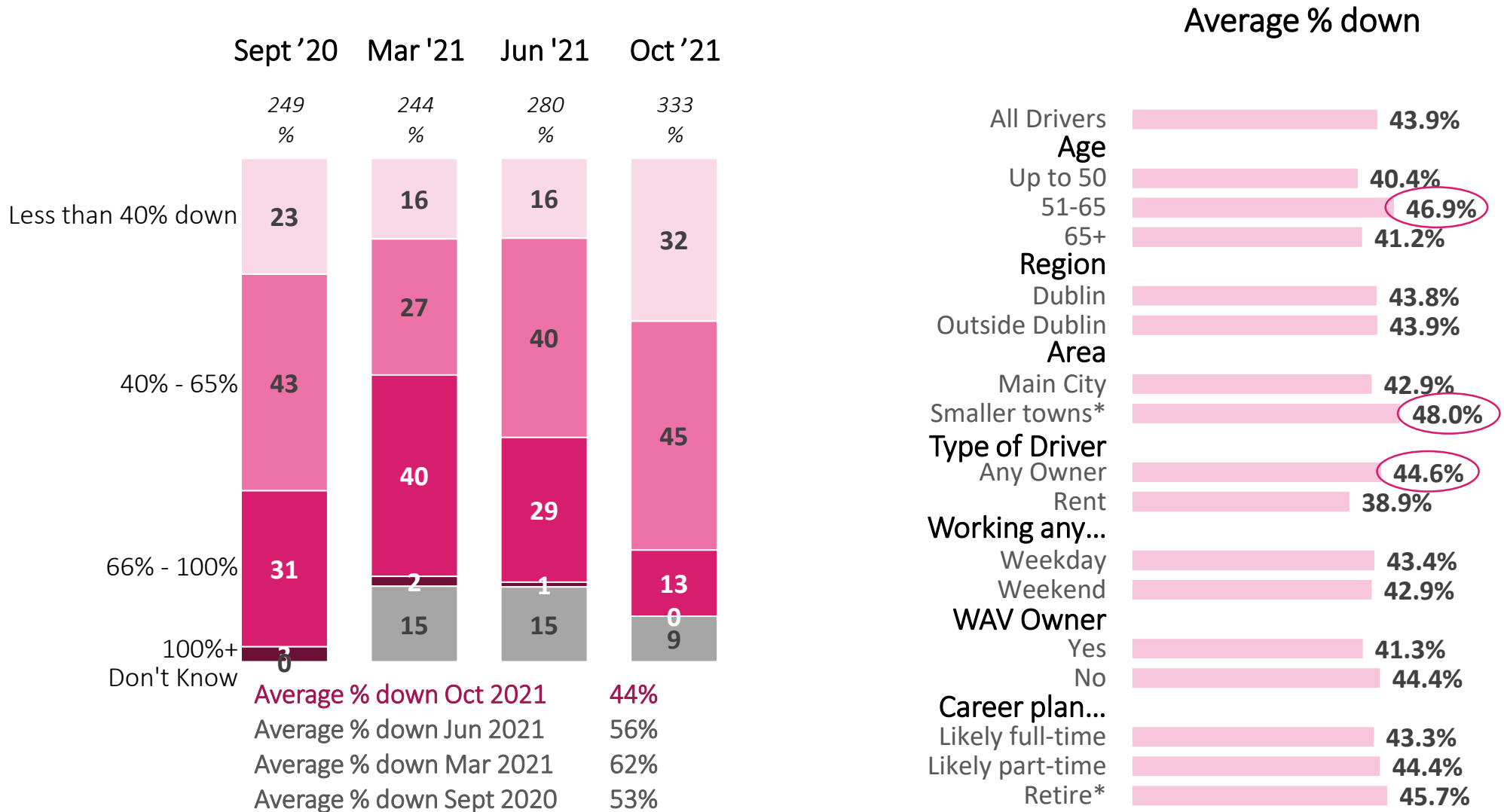


Definite improvement noted this wave, as 23% of working taxi drivers indicate they are busier than or about the same as pre-COVID times: more working and more reporting they are busier.



How much less are drivers working?

Base: 333 working taxi drivers less busy than pre-COVID

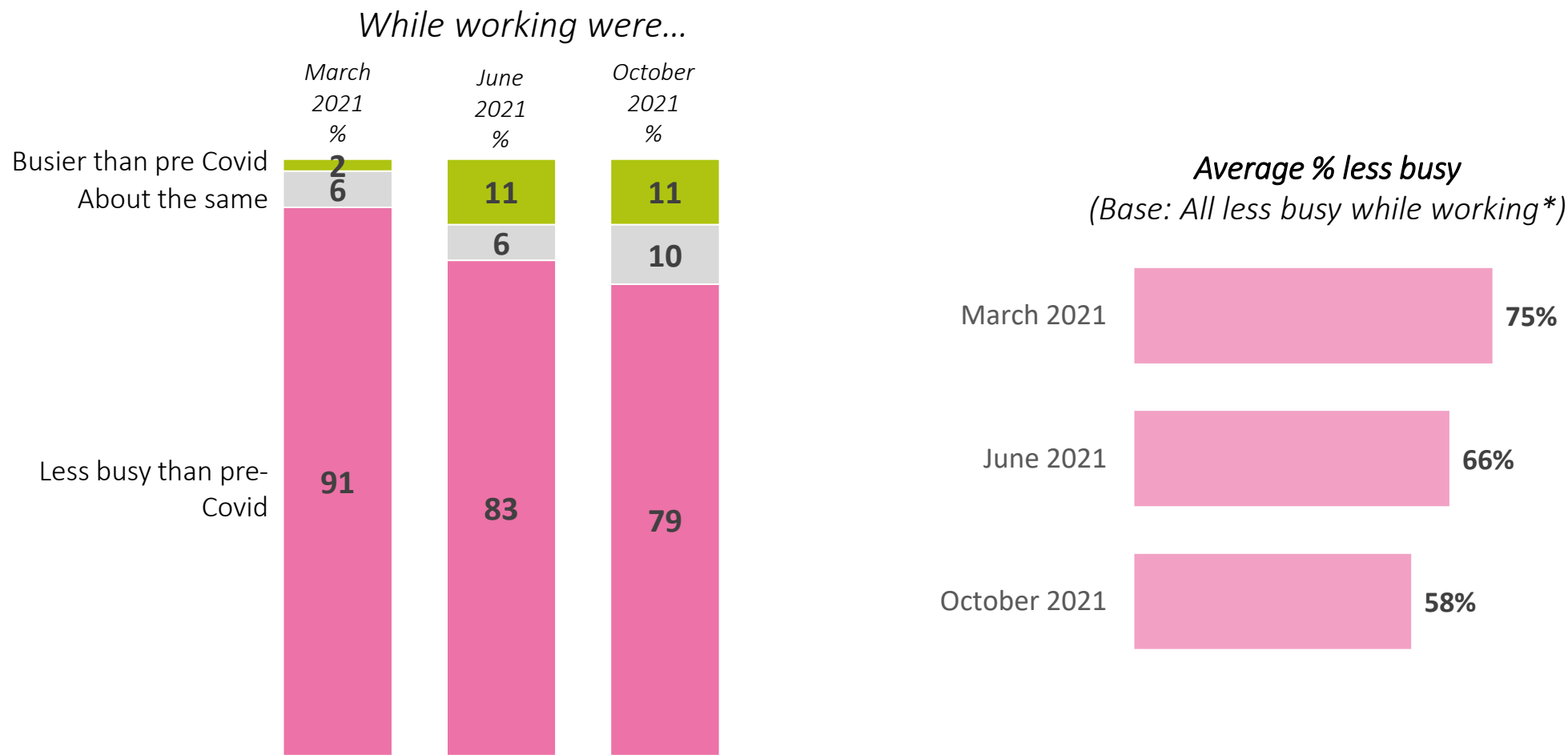


Encouragingly, the percentage of those less busy terms of workload continues to trend downwards in October 2021: 44% less busy, down from 56% in June. Those aged 51-65, those in smaller towns and those who own their taxi report higher figures on average.

*Caution: small base

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

Base: 30 taxi drivers who were working but stopped*



Very few reporting they were working but stopped (only 30 out of 503). Of those who did, 21% were busier/about the same as they were pre-COVID, with the average % less busy declining over the past two waves.

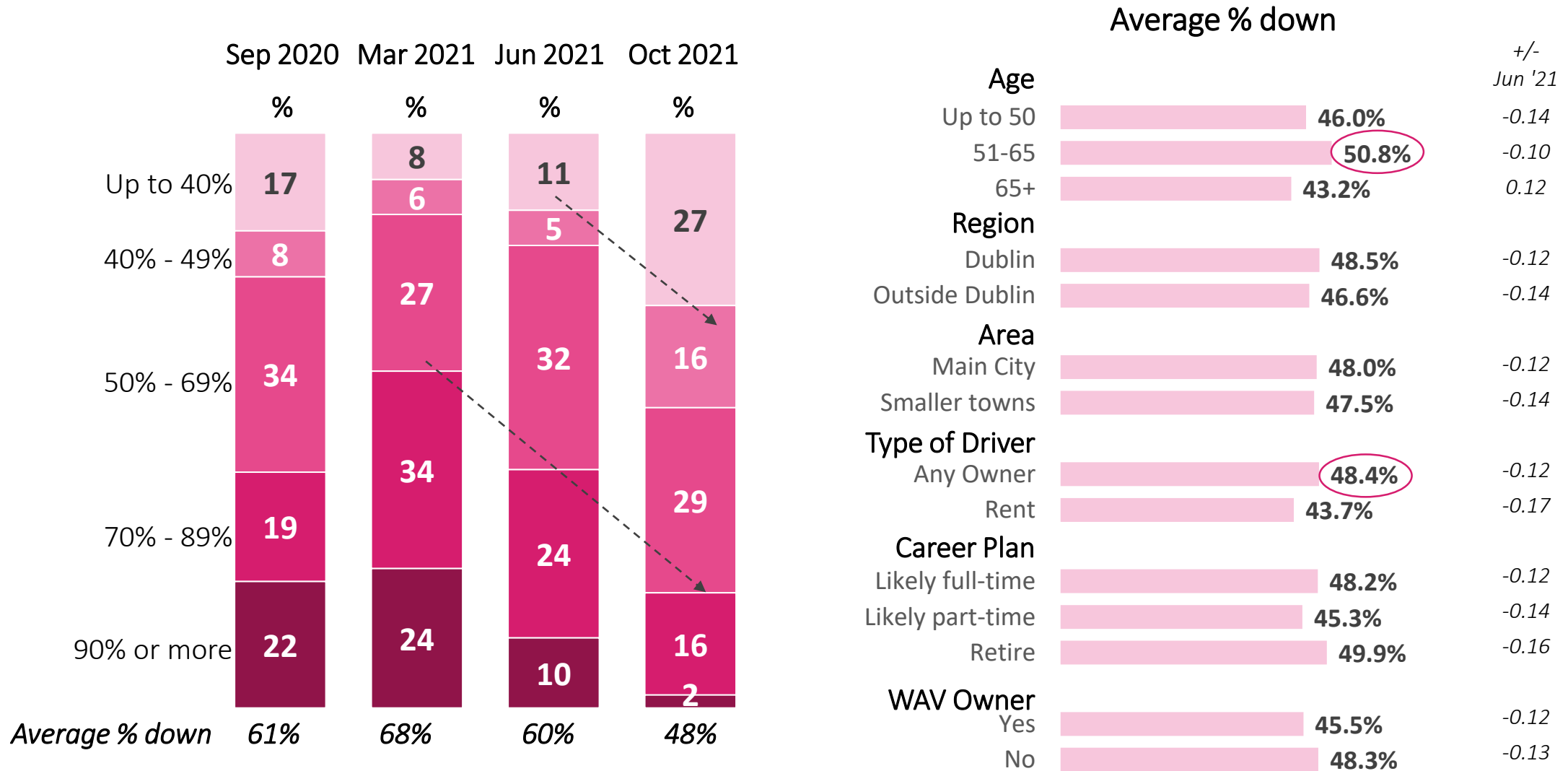
*Caution small base for October



Marginal recovery noted, as 85% of taxi drivers are earning less now than they were pre-COVID. (91% claim they were earning less in June 2021)

How much less are drivers earning?

Base: 425 taxi drivers earning less than they were pre-COVID

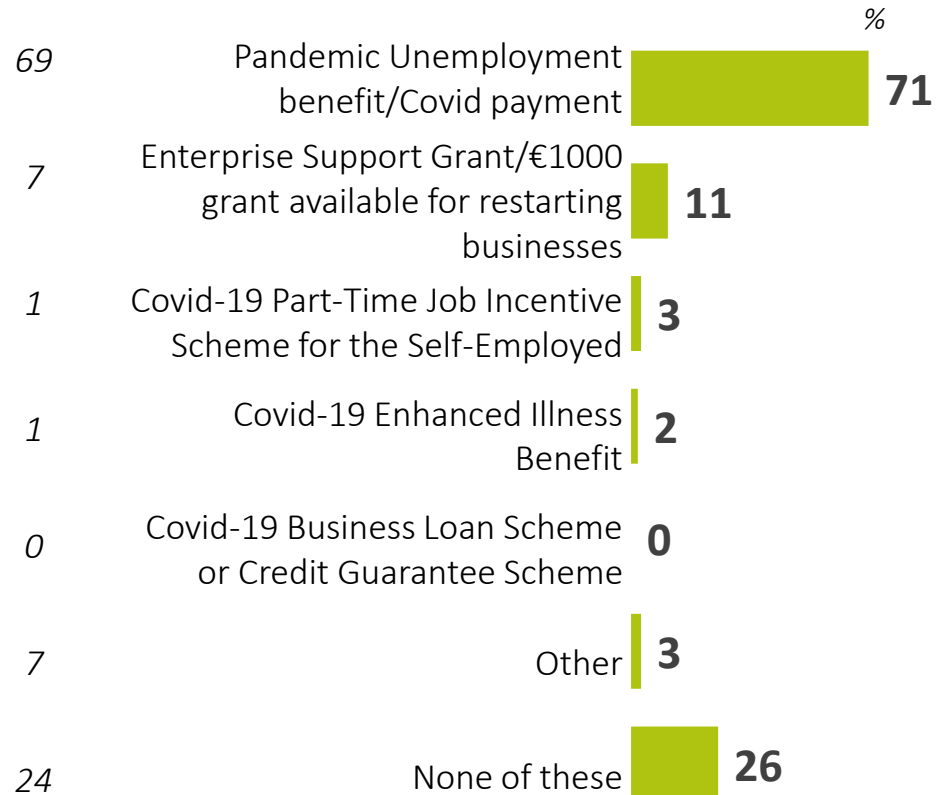


Outlook again more positive than it was in terms of how much less drivers are earning. Higher proportion reporting losses of up to 40% this wave, with fewer indicating they are down 70% or more. That said, those earning less are still 48% down on their pre-COVID income.

Government supports availed of

Base: 503 taxi drivers

June
2021
%



Age			Region		Type of Driver		Career plans			WAV Owner	
Up to 50	51-65	65+	Dublin	Outside Dublin	Any Owner	Rent	Likely full-time	Likely part-time	Retire	Yes	No
182	230	89	293	210	423	80	300	113	89	94	409
%	%	%	%	%	%	%	%	%	%	%	%
78	83	25	75	64	72	65	79	62	54	66	72
11	14	2	11	11	12	6	12	9	9	15	10
5	3	-	4	2	4	1	4	3	2	3	3
1	3	-	2	2	2	-	3	-	-	1	2
-	0	-	-	1	0	-	0	-	-	1	-
3	3	3	3	3	3	5	3	4	4	5	3
18	14	72	21	34	25	29	18	33	43	30	25

7 in 10 (71%) of drivers availed of the PUP, while 1 in 9 availed of the Enterprise Support Grant (+4% pts vs June 2021).



80% of those who
availed of the
Enterprise grant
had also installed a
temporary screen
in their vehicles.
(68% in June 2021)



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

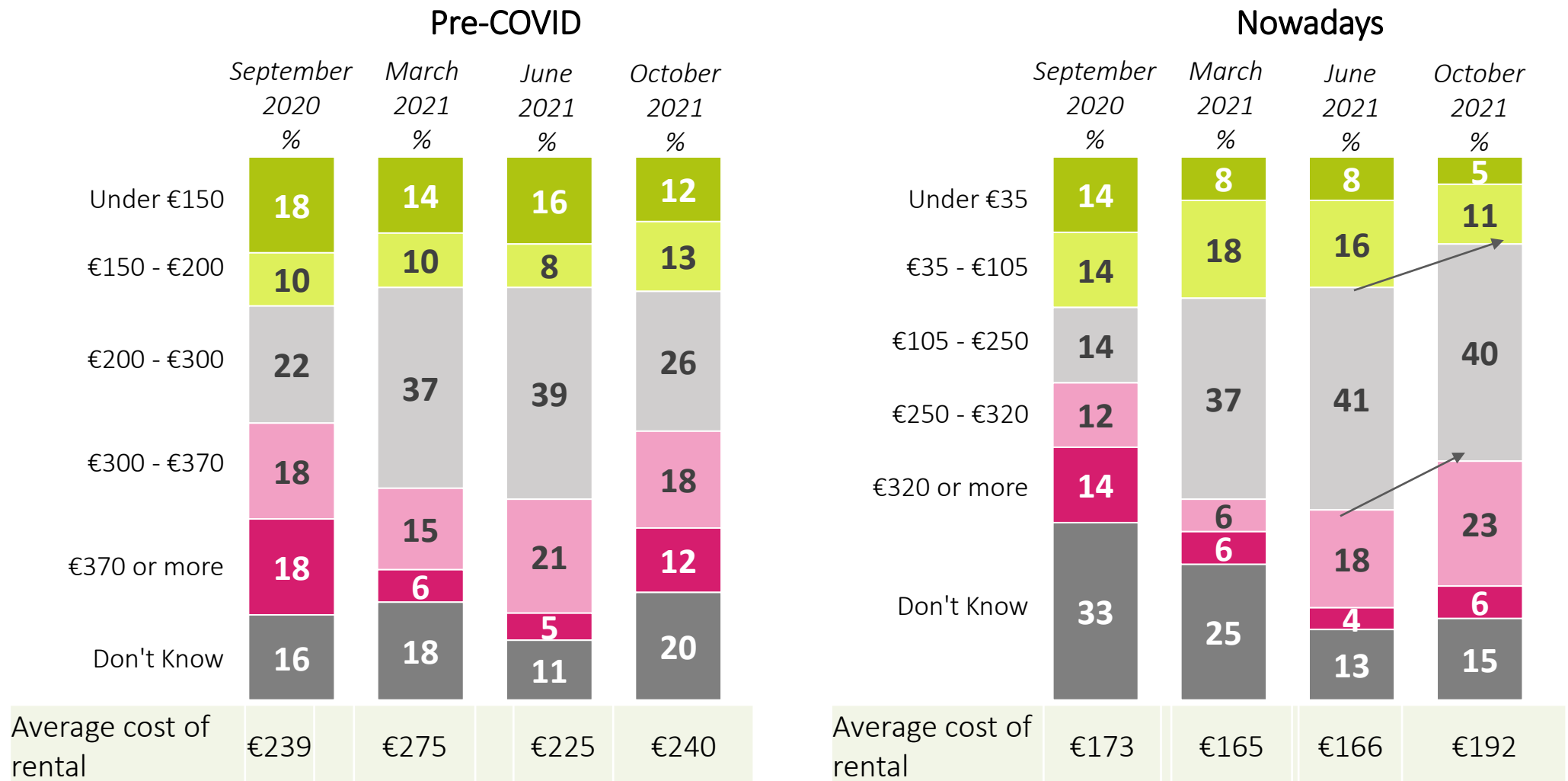


According to taxi
renters, the average
weekly cost of renting
has gone from €240
pre-COVID to €192
nowadays.

(averages €225 and €166 in
June 2021)

Weekly rental cost before and since COVID

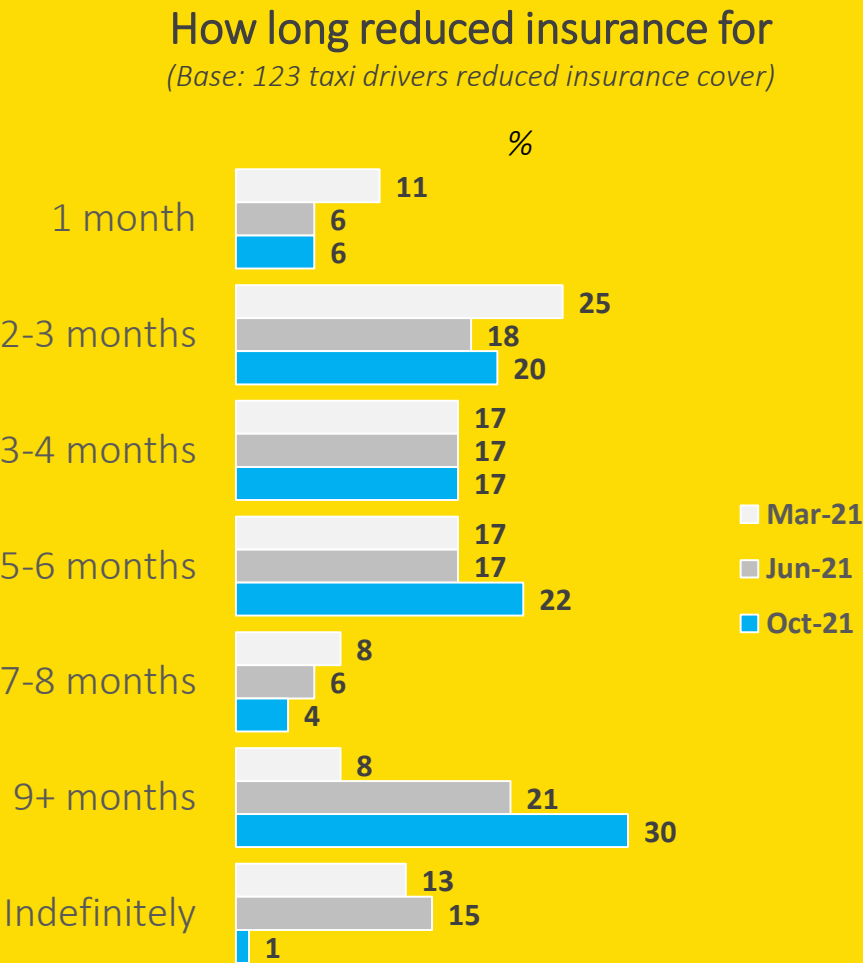
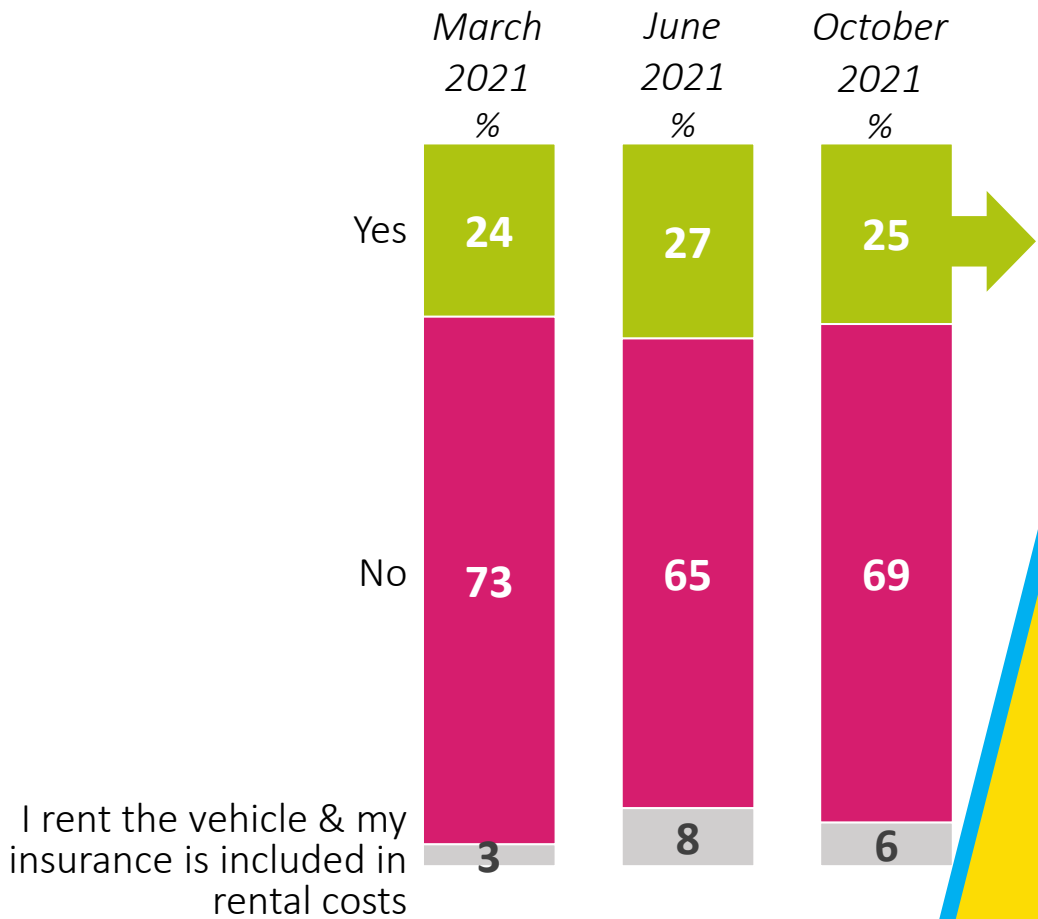
Base: 80 taxi renters



Cost of renting nowadays has gone up this wave, with fewer paying under €105 and a higher proportion paying more than €250.

Incidence of reducing insurance cover since pandemic began

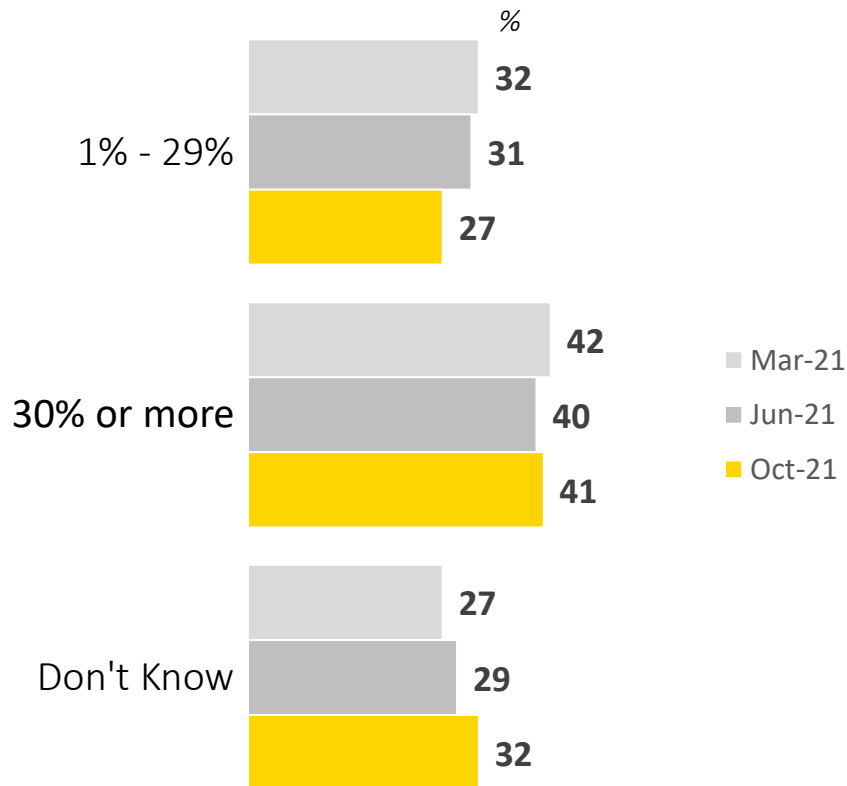
Base: 503 taxi drivers



A quarter of taxi drivers have reduced their insurance since the pandemic began. Among those who did, we see fewer this wave having done so indefinitely, with a higher proportion doing so for 5-6 months or for more than 9 months.

Percentage discount received on annual insurance premium

Base: 123 taxi drivers reduced insurance cover



Average percentage discount received on annual insurance premium

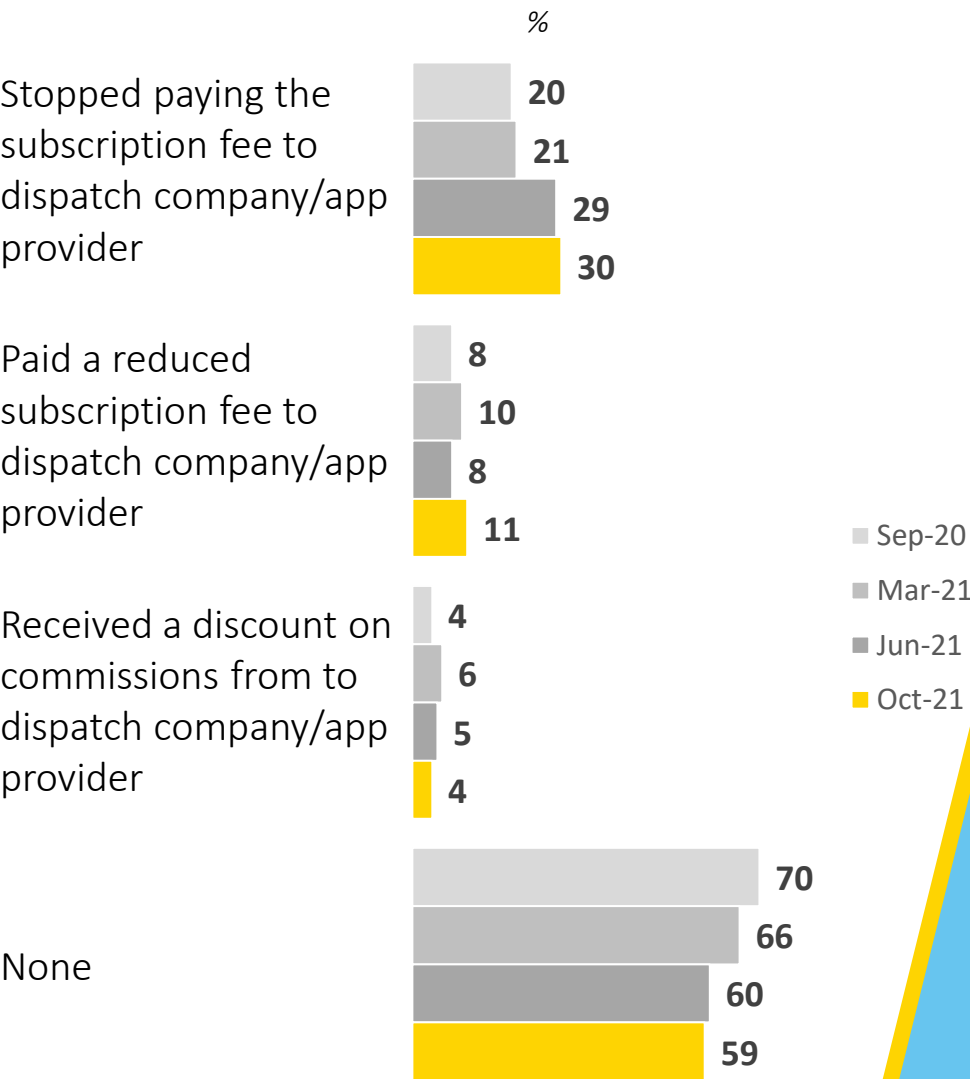
35.7%

31.9% June 2021
34.1% March 2021

Roughly 2 in 5 of those who reduced their insurance cover at some point since the pandemic received a discount of over 30%, with the average discount received being 35.7%.

Change in fees paid to dispatch company/ app provider

Base: 373 taxi drivers who use an app provider/dispatch company



*Caution: small base

Average percentage discount given on annual subscription to dispatch/app provider
(Base: 40 taxi drivers*)

33.9%
(35.4% Jun 2021
36.9% Mar 2021
31.7% Sept 2020)

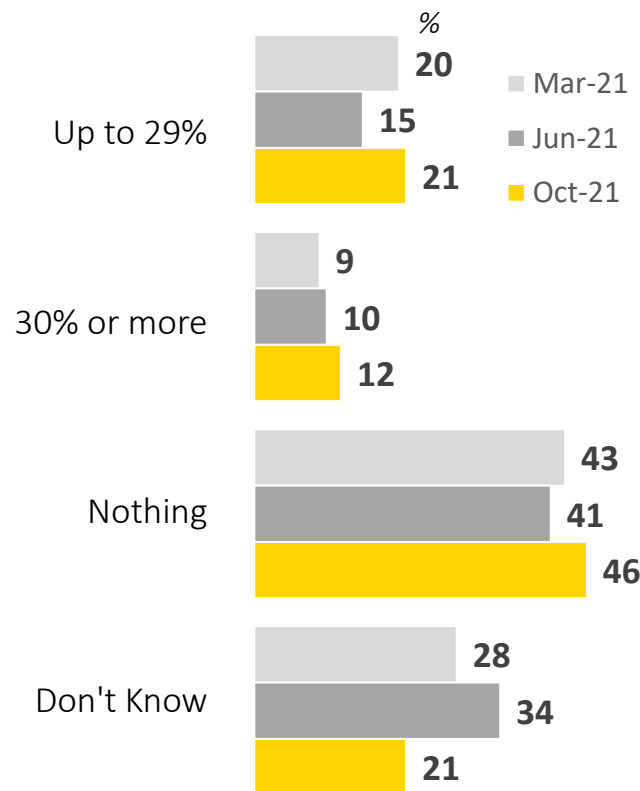
Percentage discount received on annual insurance premium compared with pre-Covid figure

Base: 219 taxi drivers did not stop paying or pay a reduced subscription fee/receive any discount on commissions from app/dispatch provider

9.5% on average

(9.3% June 2021

8.7% March 2021)



Age			Region		Area		Type of Driver		Career plans			WAV Owner	
Up to 50	51-65	65+	Dublin	Outside Dublin	Main City	Small towns	Any Owner	Rent	Likely full-time	Likely part-time	Retire	Yes	No
114	86	17*	146	73	186	32*	166	53	146	50	23*	53	166
%	%	%	%	%	%	%	%	%	%	%	%	%	%
21	21	29	21	23	22	26	24	12	18	31	23	23	21
11	14	5	10	15	12	10	11	13	12	12	9	7	13
40	52	48	49	40	46	44	47	44	45	45	53	41	48
28	12	18	20	22	21	21	17	32	24	12	16	30	18

 = Significant difference + 3%

Little change in comparison to the previous wave, as this cohort received a 9.5% discount on average in comparison with 9.3% in June 2021.

*Caution: small base

Measures put in place to ensure safety

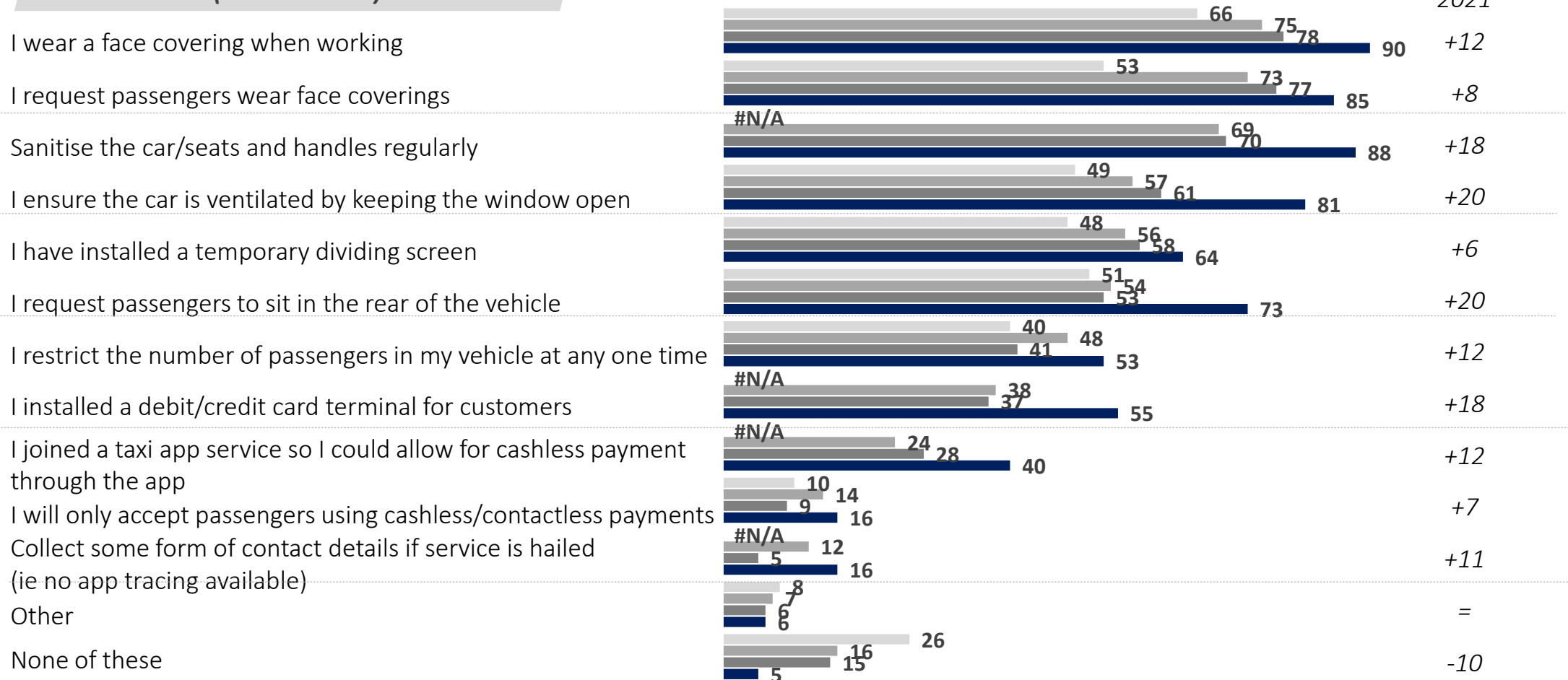
Base: 503 taxi drivers

Sep 2020
Mar 2021
Jun 2021
Oct 2021

6.8 measures on average

(6.1 June 2021)

+/- June
2021



Substantial increases in the usage of each safety measure this wave, most notably in keeping the windows open (+20% pts), requesting passengers sit in the rear of the vehicle (+20% pts), sanitizing the car regularly (+18% pts) and installing a card terminal (+18% pts).



Overall, those more likely to have implemented a wider range of measures:

- Younger drivers
- Those working at present
- WAT drivers
- Those using an app service

Drivers outside Dublin more likely to:

- Be using face masks while working
- Requesting passengers wear face masks
- Sanitising cars regularly

Drivers in Dublin more likely to:

- Have installed a screen
- Be restricting passengers
- Have installed a card terminal
- Joined an app service

Measures put in place to ensure safety x driver profile

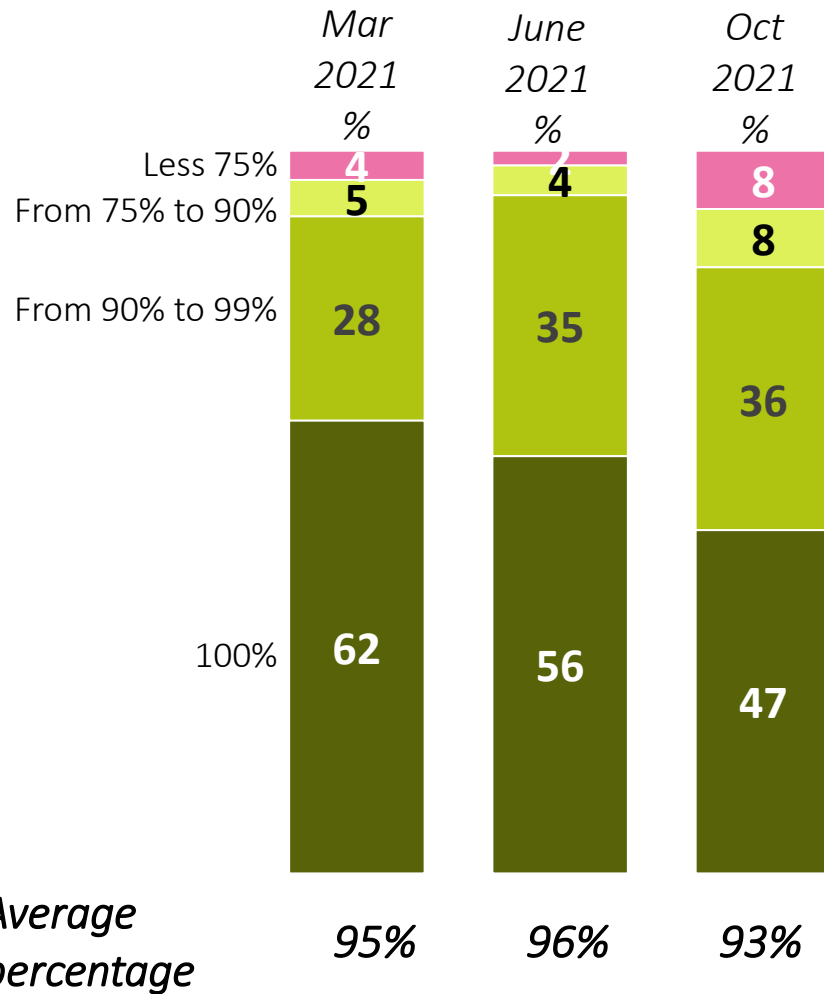
Base: 503 taxi drivers

	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>	519	193	244	75	269	250	430	75	89	430	332	118	126	308	211
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I wear a face covering when working	90	91	90	89	88	93	90	89	90	90	92	87	84	96	55
Sanitise the car/seats and handles regularly	88	90	87	86	85	92	89	82	91	87	89	83	84	93	53
I request passengers wear face coverings	85	85	85	83	82	90	86	81	80	86	86	84	80	90	54
I ensure the car is ventilated by keeping the window open	81	80	82	82	78	86	83	73	80	82	82	78	77	86	52
I request passengers to sit in the rear of the vehicle	73	74	72	72	68	79	73	69	77	72	73	75	67	77	47
I have installed a temporary dividing screen	64	72	60	57	72	51	64	61	66	63	72	63	41	68	36
I installed a debit/credit card terminal for customers	55	56	57	46	56	54	58	43	51	56	62	52	36	59	31
I restrict the number of passengers in my vehicle at any one time	53	55	52	51	48	61	55	42	54	53	54	56	47	56	34
I joined a taxi app service to allow for cashless payment through the app	40	47	36	37	42	36	44	28	46	38	53	36	9	43	23
I will only accept passengers using cashless/contactless payments	16	18	15	11	16	14	16	15	19	15	17	19	11	17	9
Collect some form of contact details if service is hailed	16	18	16	9	13	19	16	11	14	16	15	25	14	16	11
Other	6	4	7	5	5	6	5	7	7	5	6	4	5	5	11
None of these	5	5	5	2	6	2	5	3	6	4	4	9	6	0	31

Younger drivers more likely to have installed a dividing screen and/or joined a taxi app service than others. Those outside Dublin more inclined to be requesting face coverings, passengers sit in rear and/or sanitising their vehicle regularly, whereas Dublin taxi drivers more likely to have a dividing screen.

Percentage of customers wearing masks nowadays

Base: 432 taxi drivers working at present



The amount of working taxi drivers who claim that 90% or more customers are wearing face coverings has dropped this wave: -8% pts vs June 2021

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

Suggestions from taxi drivers about industry measures by wave

Base: 503 taxi drivers

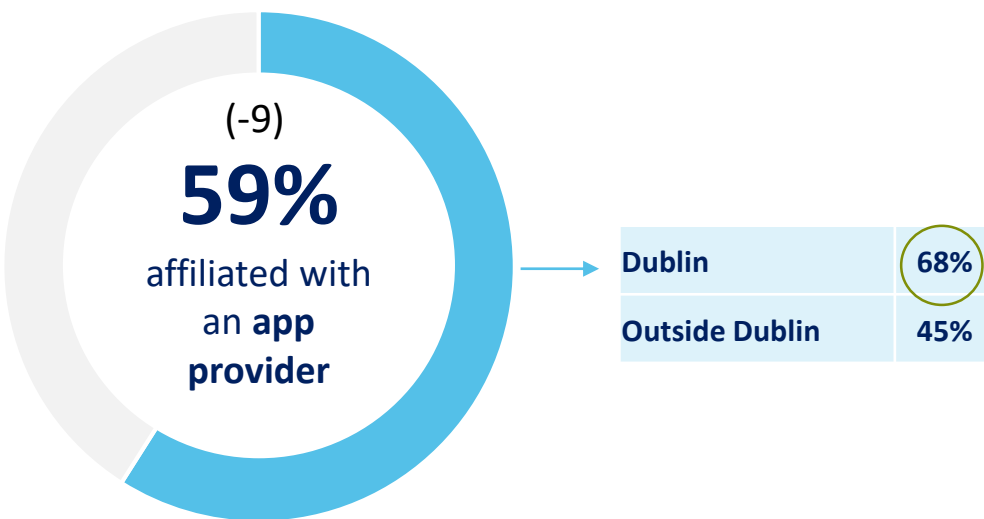
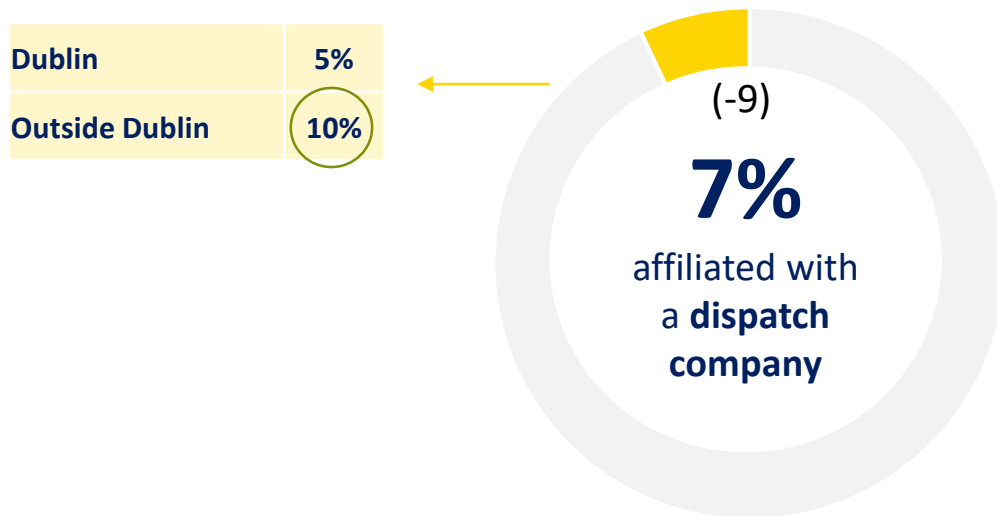
	Wave 1	Wave 2	Wave 3	Wave 4
Screens / grant for screens	19	18	22	22
Mandatory masks / use of hand gel / PPE / advice for passengers	15	5	6	5
Driver safety / stricter enforcement	9	7	10	14
Camera / CCTV / Grant for security	8	4	7	8
Cashless payment / app	4	6	3	7
Emergency line / link to Gardaí.	4	3	6	7
Policing / bus lanes / taxi ranks	3	N/A	2	2
NTA info/advice.	3	4	3	7
Clarity of passenger identity	3	2	3	3
Fewer taxis /no new drivers	2	N/A	N/A	N/A
Prevent illegal operators/more inspectors	2	2	N/A	3
Option to sell licence/plate	2	N/A	N/A	2
Remove 10yr rule on car even if passed NCT	2	N/A	3	N/A
It's our own responsibility	2	N/A	N/A	2
Grants/subsidies/supports	2	4	4	4
Right to refuse passengers	1	N/A	N/A	N/A
Right to refuse front seat passenger	1	N/A	N/A	2
Affordable insurance	1	2	2	N/A
Shouldn't have to wear seat belt	1	N/A	N/A	N/A
Panic button / safety alarm	N/A	2	N/A	N/A
Vaccine - priority / know if someone has been	N/A	2	N/A	N/A
Other	12	7	9	13
None	22	25	25	12
Can't think of anything	12	18	11	21



**Cashless
payments**

Taxi Driver Affiliates

Base: All taxi drivers: 503

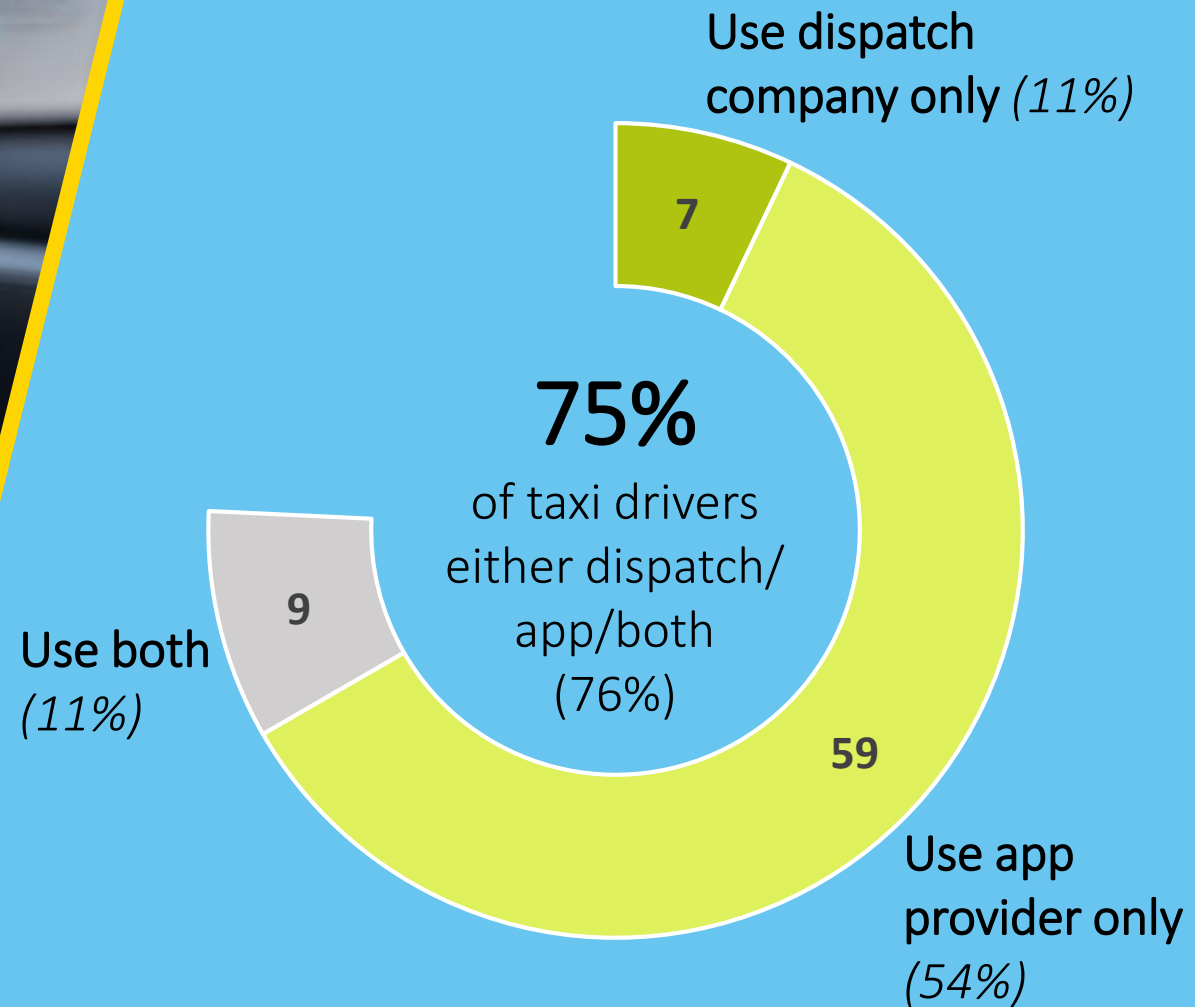


(Wave 3 results)





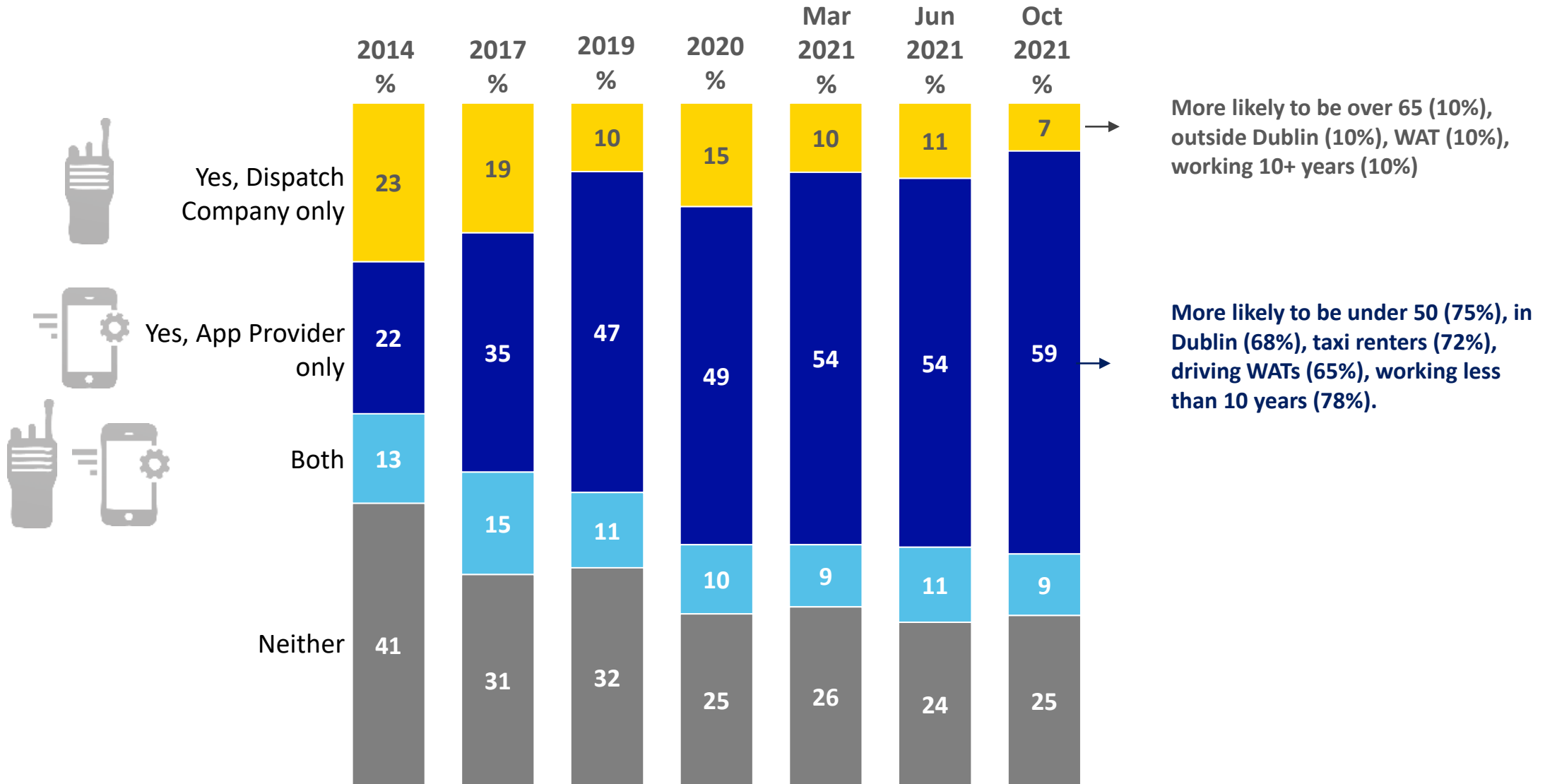
Use of apps/dispatch



(% June 2021)

Taxi Driver Affiliates

Base: All taxi drivers: 503



Although the proportion affiliated with either or both appears to have plateaued, it would seem that app provider affiliations are eating into the share of dispatch company affiliations this wave, as app only affiliations are up +5% pts, while dispatch only are down -4% pts.

App/Dispatch Crossover

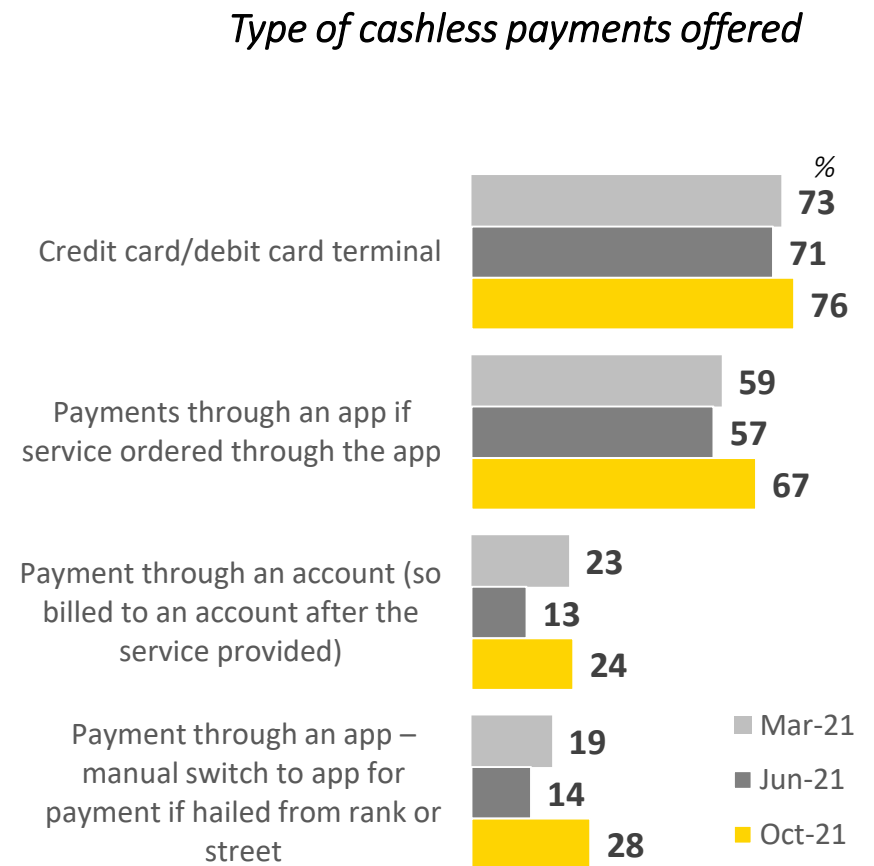
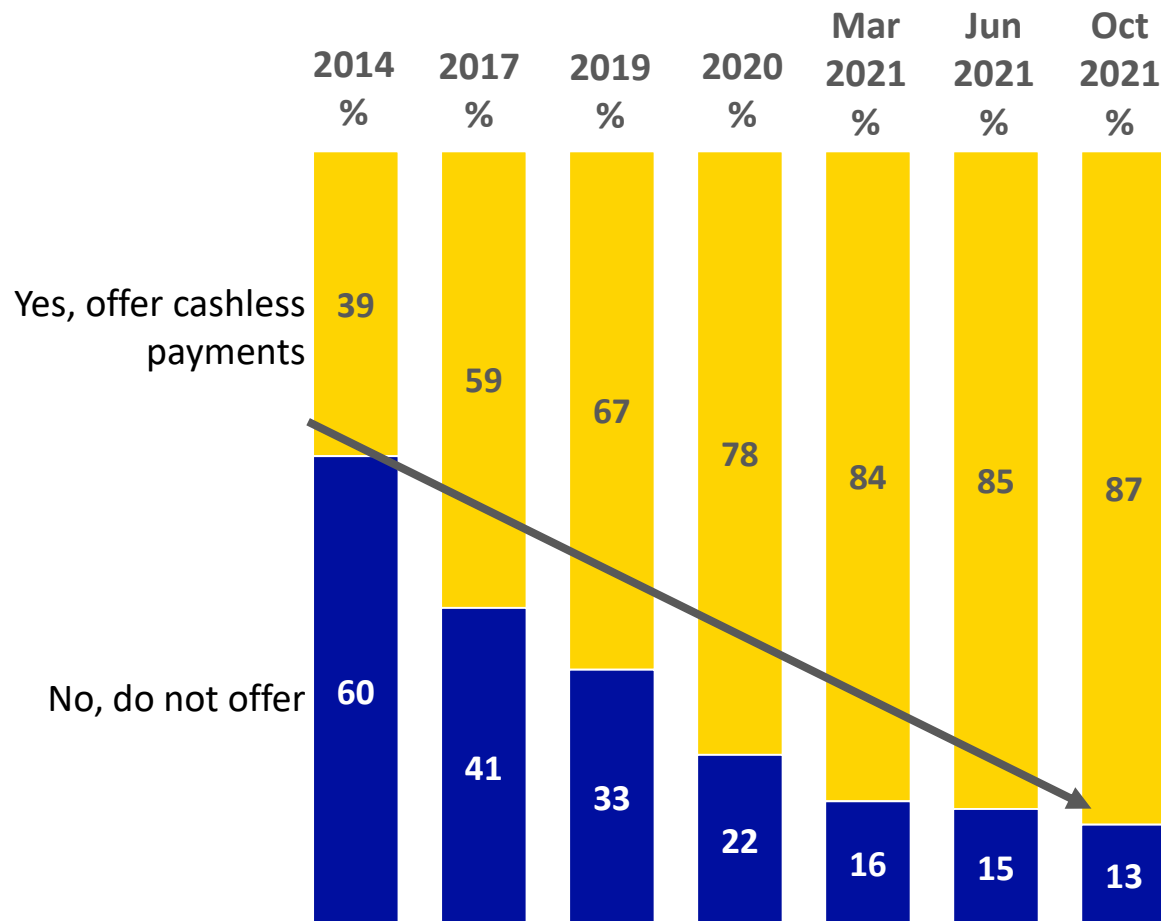
Base: All taxi drivers: 503

	Any use of...	
	App	Dispatch
<i>Base:</i>	338	79
	%	%
Yes, Dispatch company only	-	44
Yes, App provider only	87	-
Both	13	56

Once again, the vast majority of app users (87%) are using the app only, while more than half of those using a dispatch service (56%) are also using the app. (Similar to previous waves of research, although with app encroaching even more on dispatch affiliations this wave.)

Incidence of cashless payments

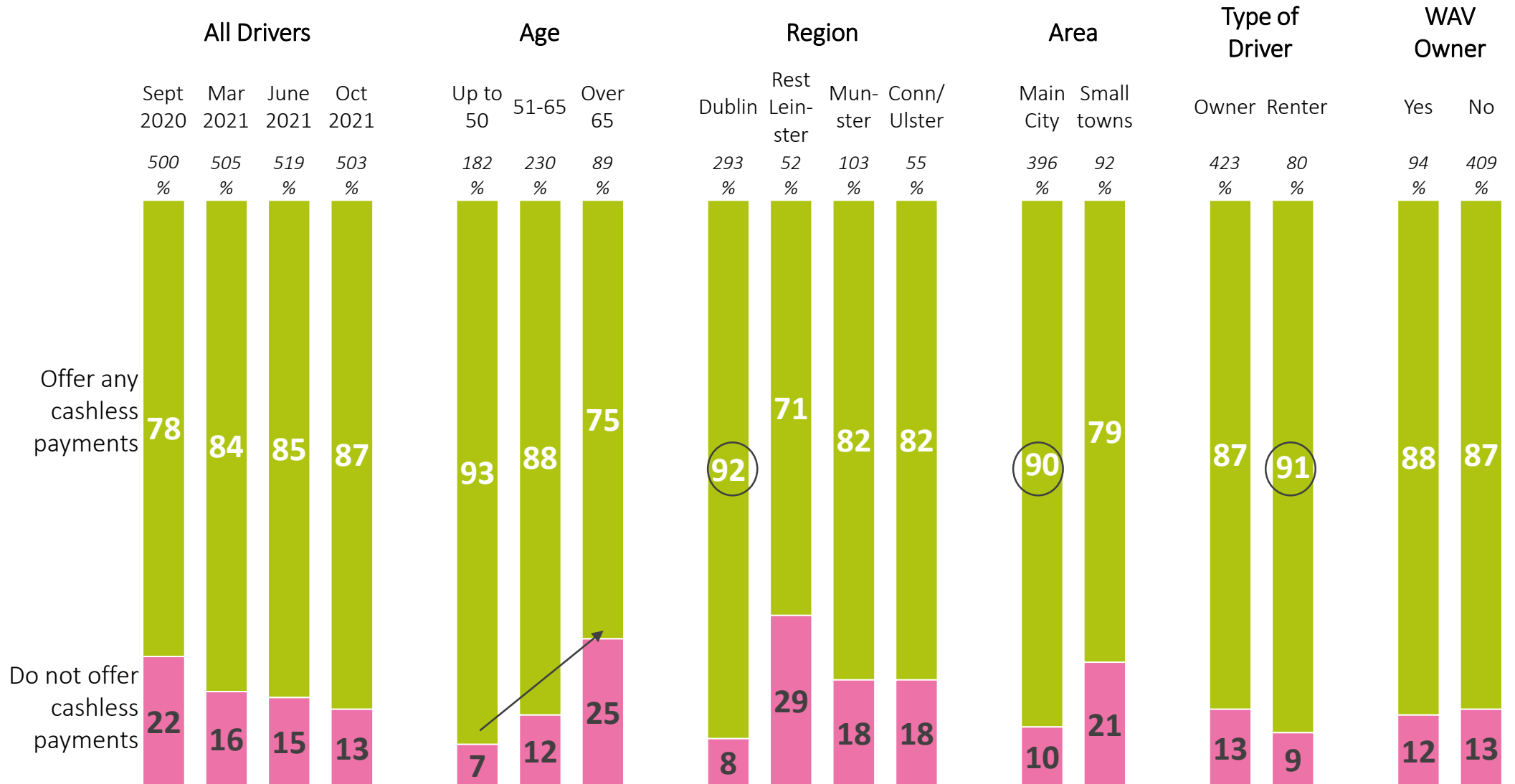
Base: 503 taxi drivers



Little change in proportion offering cashless payments, albeit the figure continues to trend upwards. However, we do see increases in the proportion offering various types of cashless payments in comparison with June 2021: card terminal +5% pts, payments through app service ordered through +10% pts, payments through account +11% pts and manual payment through an app +14% pts.

Cashless payments

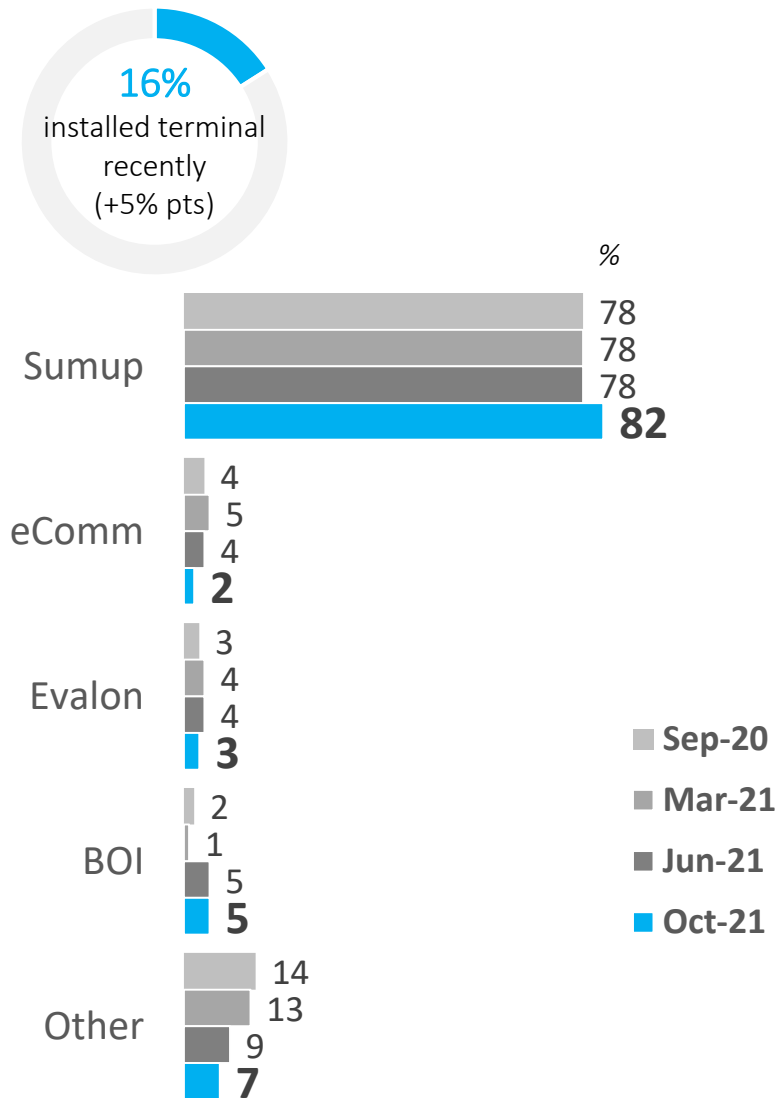
Base: 503 taxi drivers



Decline in incidence of offering cashless payments with age, while those in Dublin, those in main cities and drivers who rent the vehicles they operate, are more inclined to offer cashless payments than others. Incidence lowest among over 65s, in Leinster (outside Dublin) and in small towns overall.

Type of terminal used

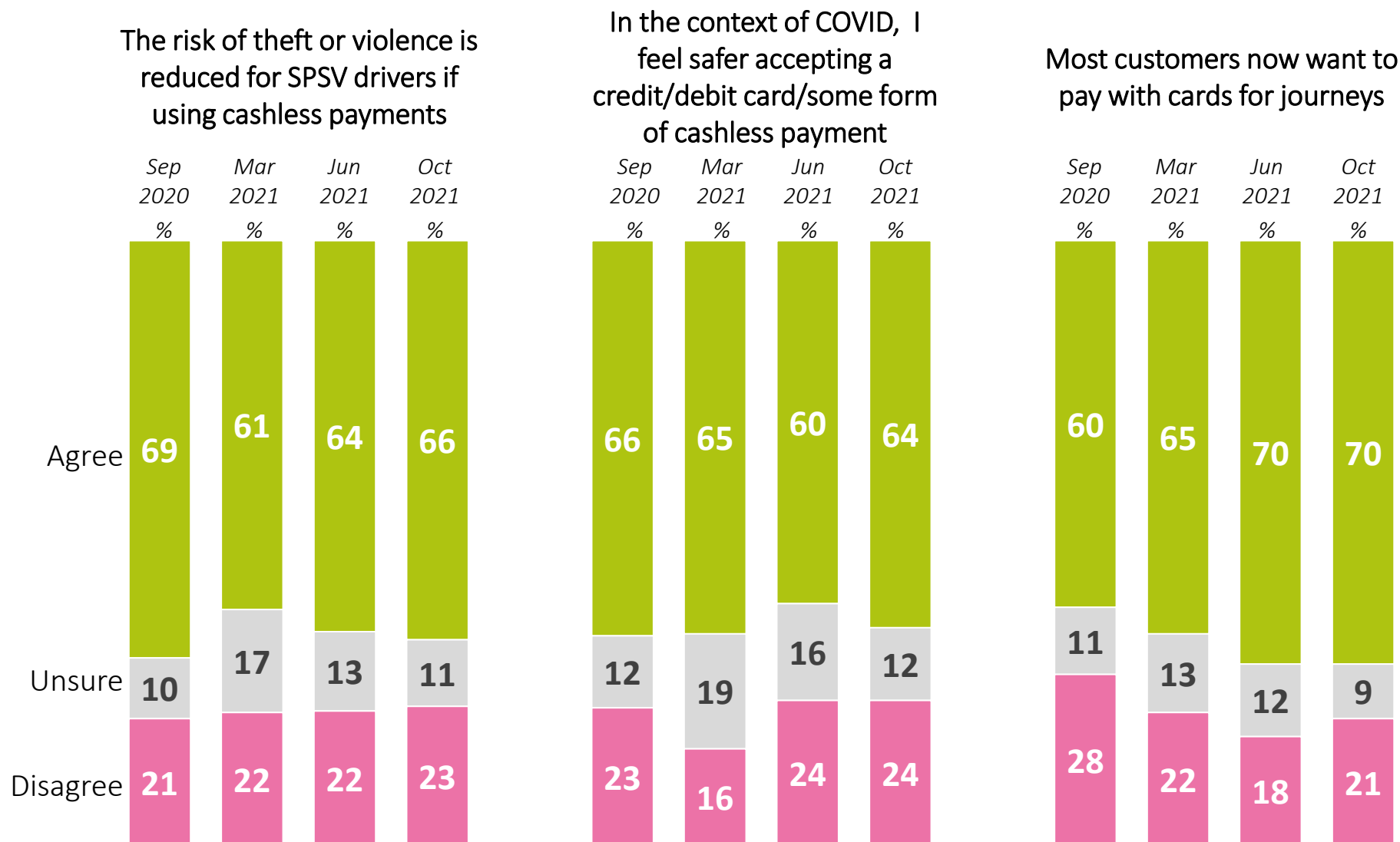
Base: 380 taxi drivers use a credit/debit card terminal



1 in 6 of those who use a card terminal installed it recently, while just over 4 in 5 of those who use one have a Sumup device (+4% pts vs June 2021).

Attitudes towards cashless payments

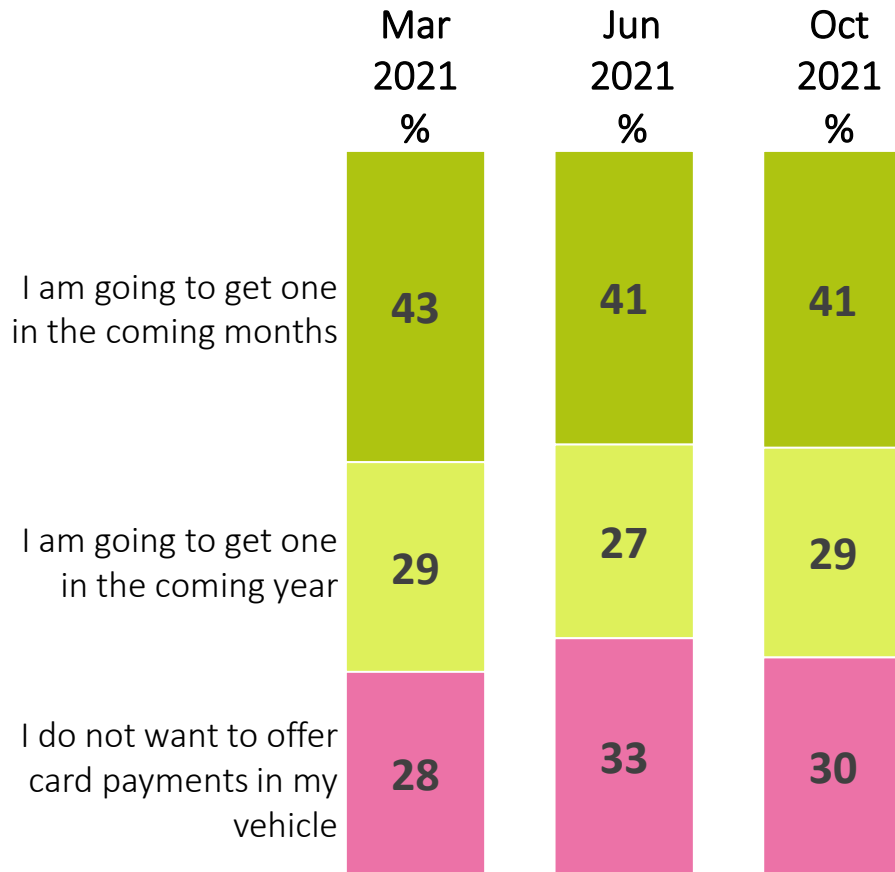
Base: 503 taxi drivers



Slight uplift in proportion who feel safer accepting cashless payments in the context of COVID this wave (+4% pts), while little change elsewhere. 7 in 10 continue to feel that most customers want to pay with cards for journeys.

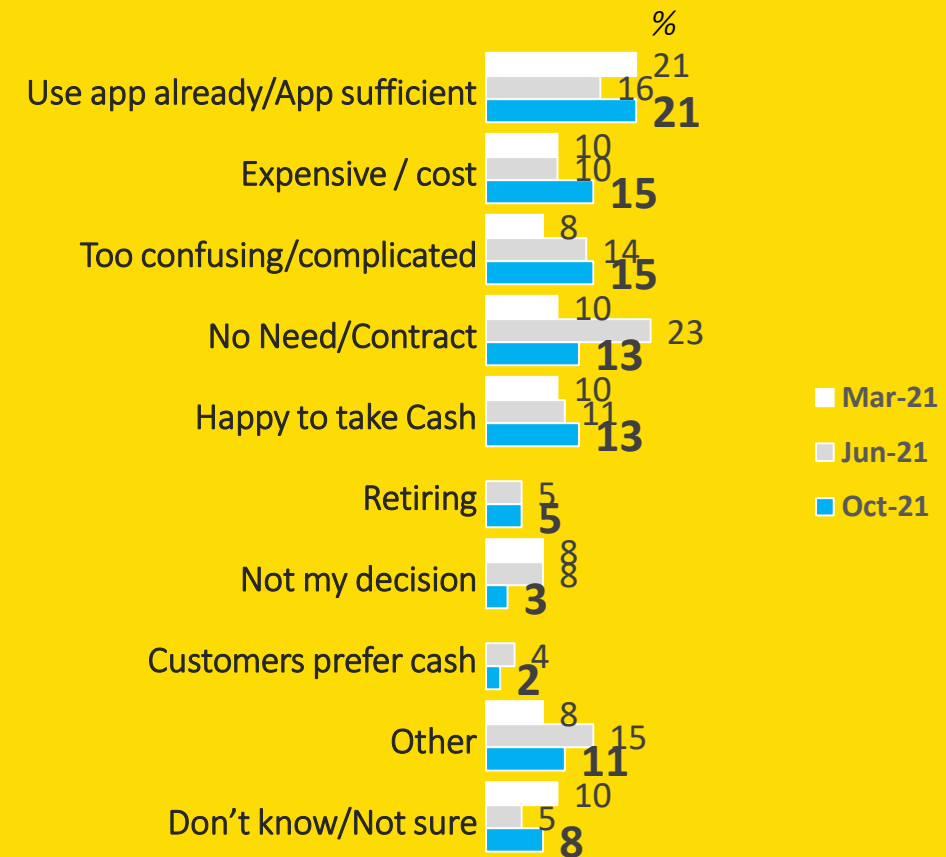
Plan to get card terminal if don't have one

Base: 122 taxi drivers don't have a card terminal



Reasons don't want one

(Base: 38* taxi drivers don't plan to get one)



No real change in plans of those who don't have a card terminal at present: 41% plan to get one in coming months, while 29% indicate they plan on getting one in the coming year. Among the small few who don't want one, the most common reason given is that they feel the app they are using is sufficient.

*Caution: small base



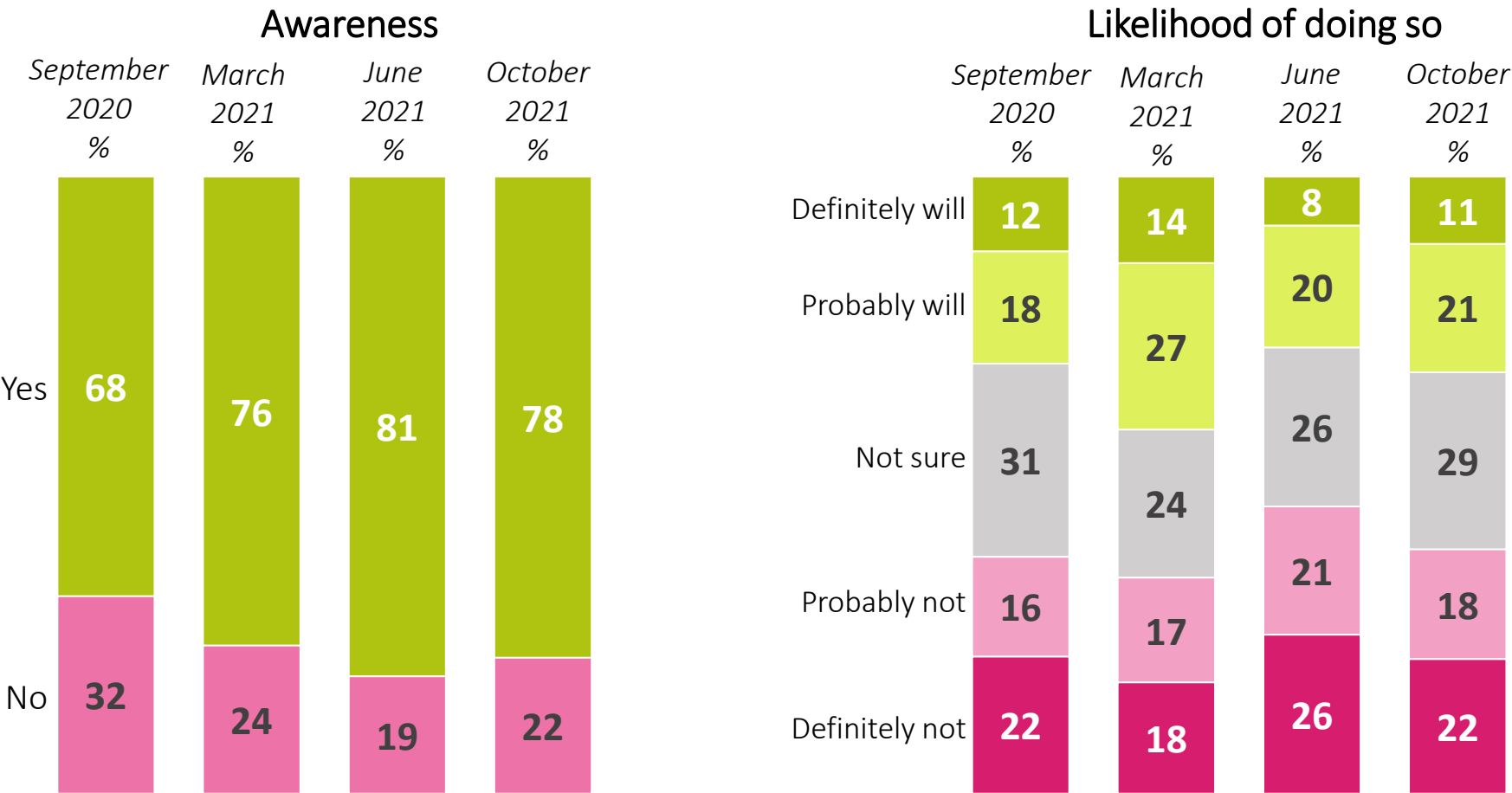
Licence Laws



Awareness of the possibility to rent out a taxi once you retire among licence holders stands at 78% (-3% vs June), while likelihood of doing so has reached 32% (+4% pts)

Awareness & likelihood of renting vehicle to someone else following retirement

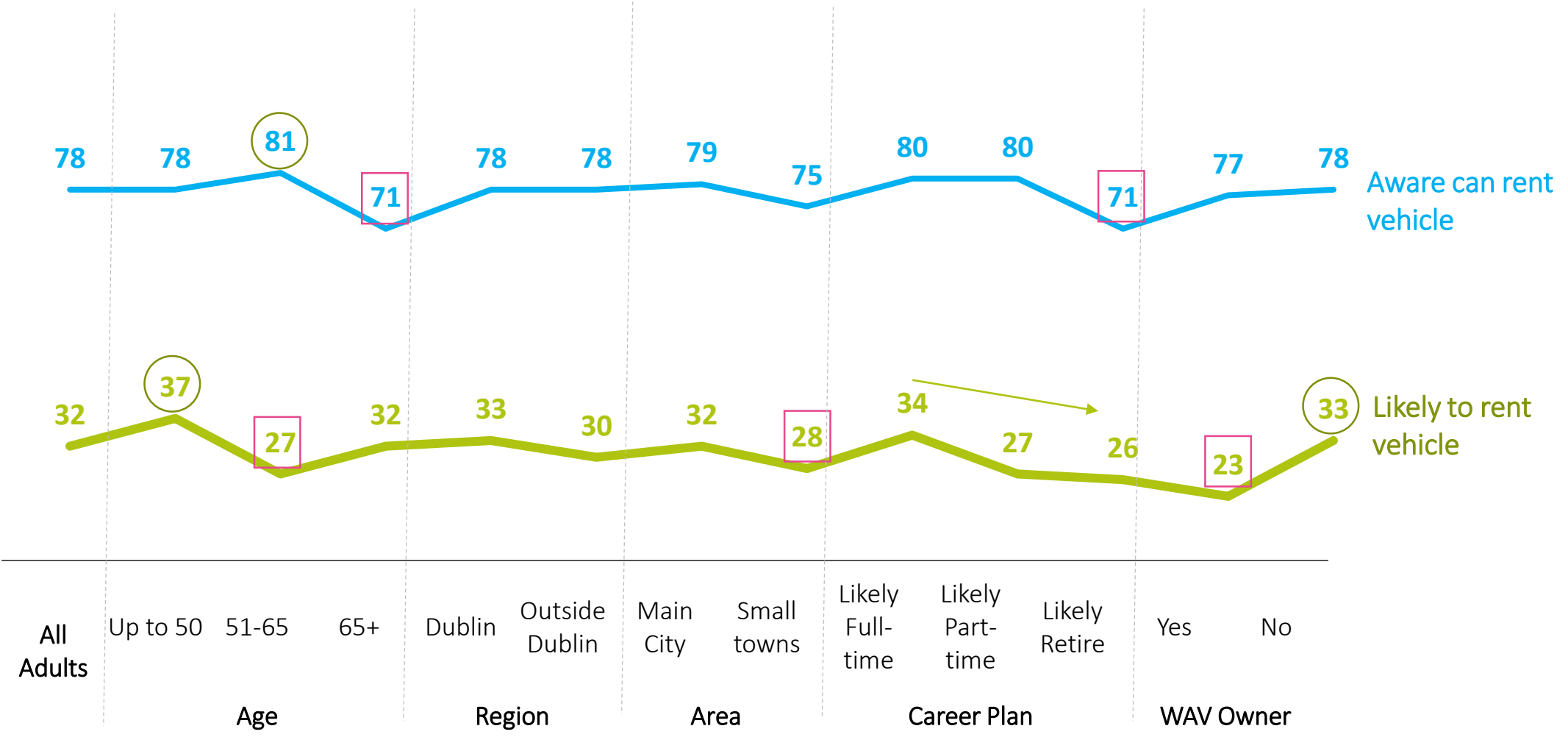
Base: 423 licence holders



Little change in level of awareness that you can rent your licenced vehicle when you stop driving, although upward trend has abated. Marginally fewer less likely to do so: 40% definitely/probably will not this wave vs. 47% in June 2021.

Awareness x likelihood of renting licenced vehicle

Base: 423 licence holders



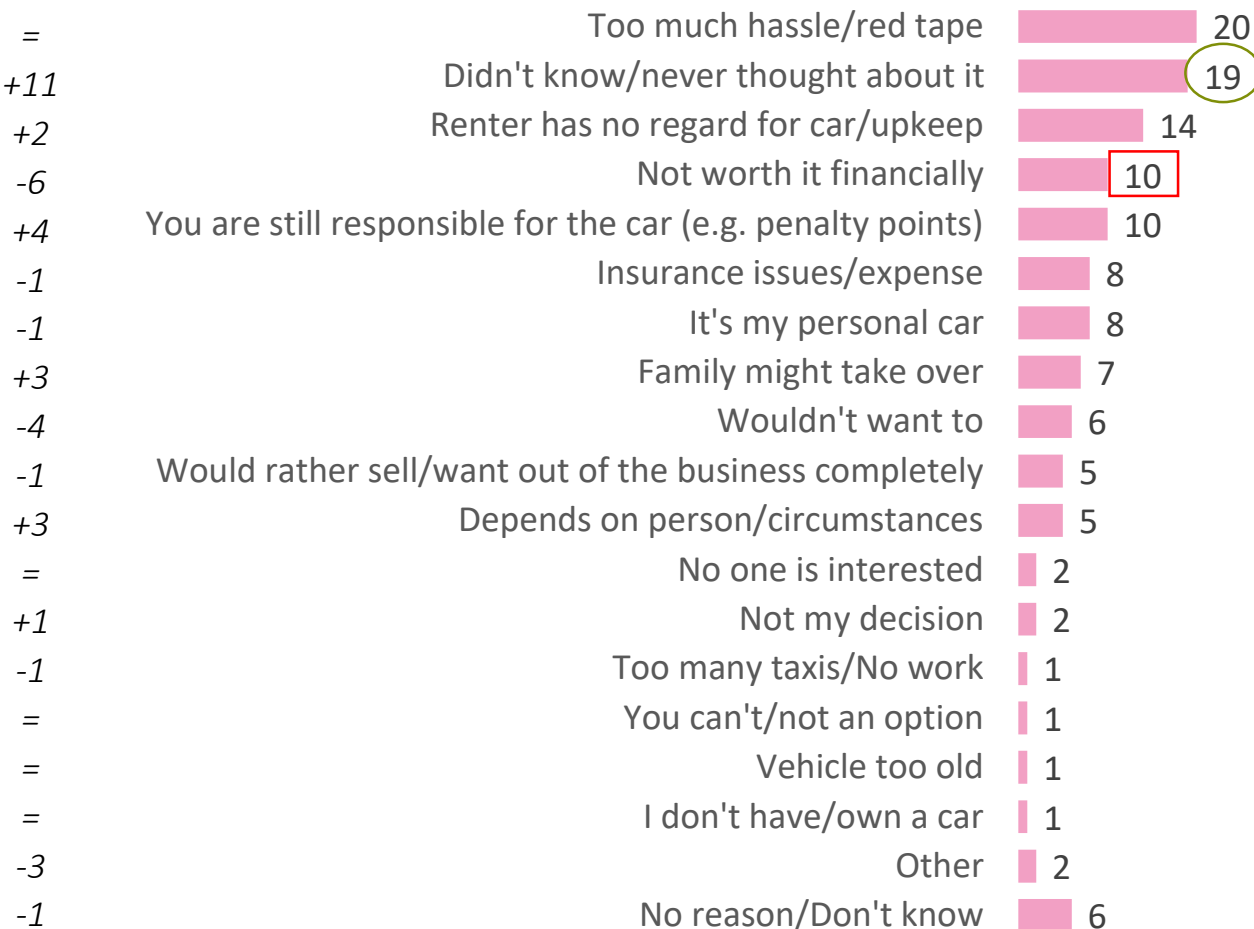
Awareness is strongest among the 51-65 age group, although they are the least inclined to suggest they would definitely/probably do it. Younger drivers and those who are not driving a WAT are the most likely to suggest they would rent out their vehicle once they stopped driving, whereas those likely to retire in the coming three years, those in small towns and those with a WAT are less likely to say so.

Reasons unlikely to rent licenced vehicle

Base: 303 taxi drivers who own a taxi licence and are unlikely to rent vehicle

+/- June

2021



Age			Region	
Up to 50	51-65	65+	Dublin	Outside
79	153	58	165	127
%	%	%	%	%
14	22	25	24	15
26	16	14	22	13
15	15	8	16	10
6	10	15	9	13
14	8	8	10	10
5	6	19	4	14
8	7	9	7	9
2	8	11	7	8
8	6	2	4	9
1	8	3	3	8
9	3	7	8	1
-	3	2	-	4
1	2	3	1	4
1	1	-	1	1
1	1	-	1	2
1	-	2	1	1
-	1	2	1	1
-	3	2	2	2
12	6	-	5	8

Incidence of perceiving renting a licenced vehicle to be too much hassle increases with age and is higher in Dublin, whereas younger drivers are more inclined to indicate they never thought about it.

All others less than 1%

*Caution: small base



91%

of taxi drivers are **aware**
that no one can inherit
your vehicle licence unless
a **nomination form** has
been lodged
(88%)

Awareness of need for Nomination Form

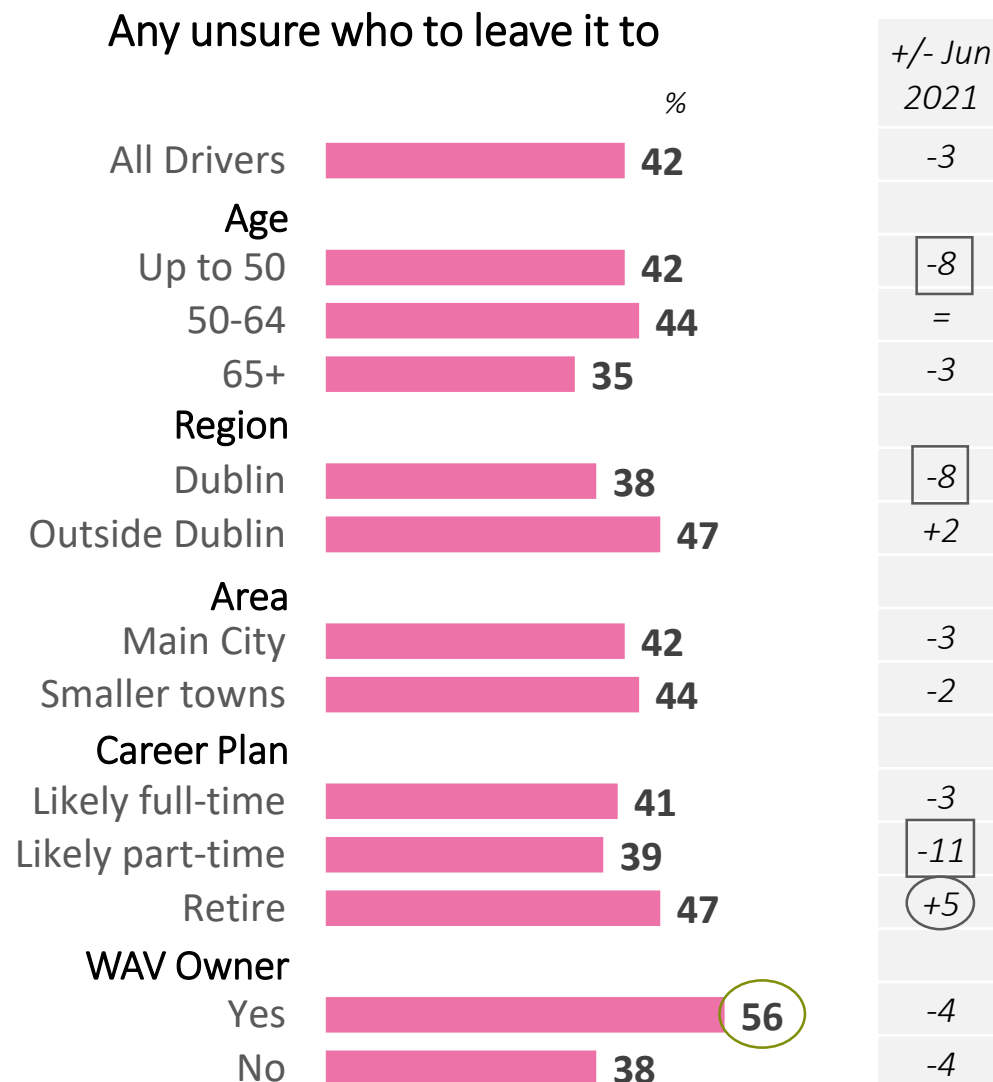
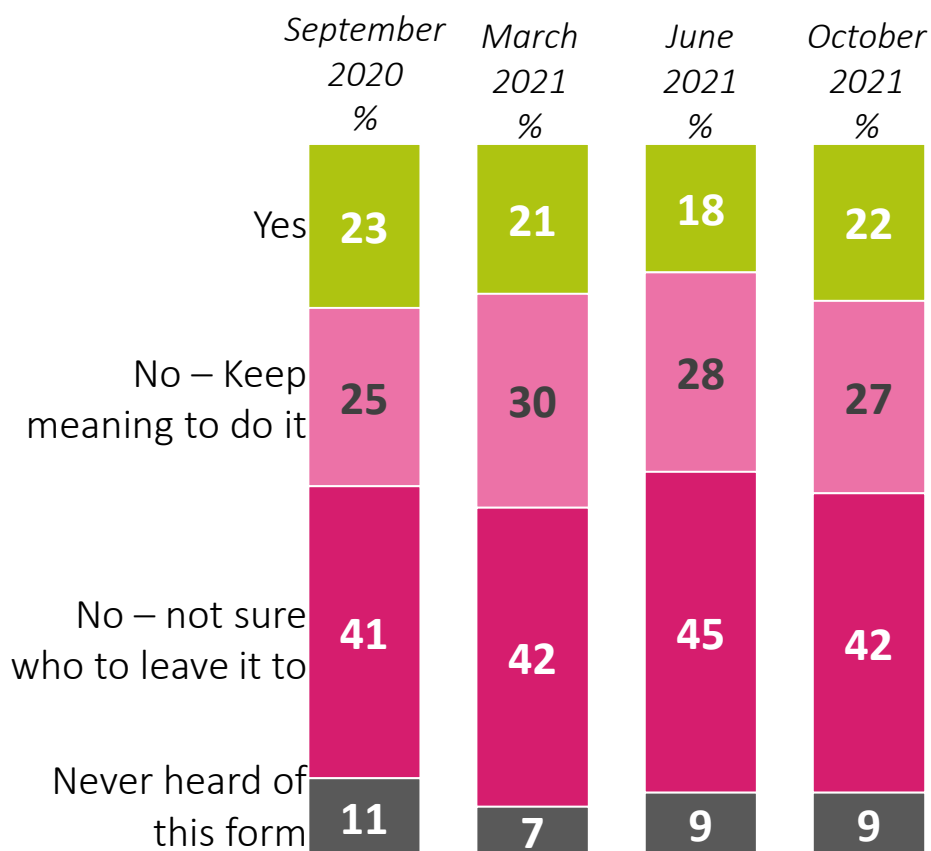
Base: 423 licence holders



Younger adults and those working in smaller towns are the more inclined to indicate that they had not been aware of the need of a nomination form prior to this survey.

Incidence of having completed nomination form

Base: 423 licence holders

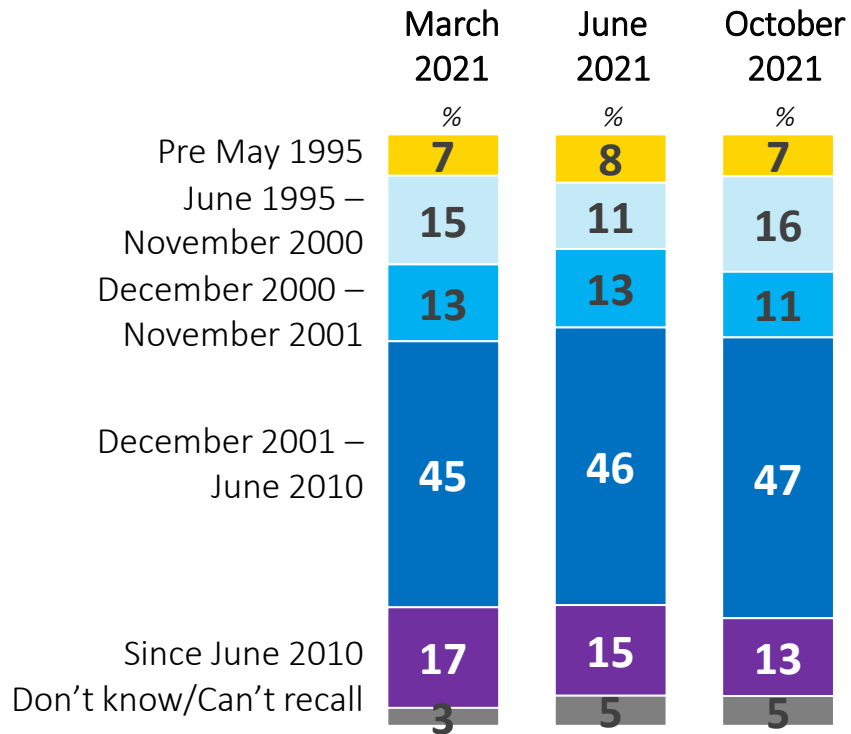


Slight increase in proportion who have completed their nomination form, although change marginal. Fewer aged under 50, in Dublin and/or working part time are unsure of who to leave their vehicle to this wave, while a higher proportion of those who are likely to retire in the next three years indicate they are unsure of this in comparison with June 2021.

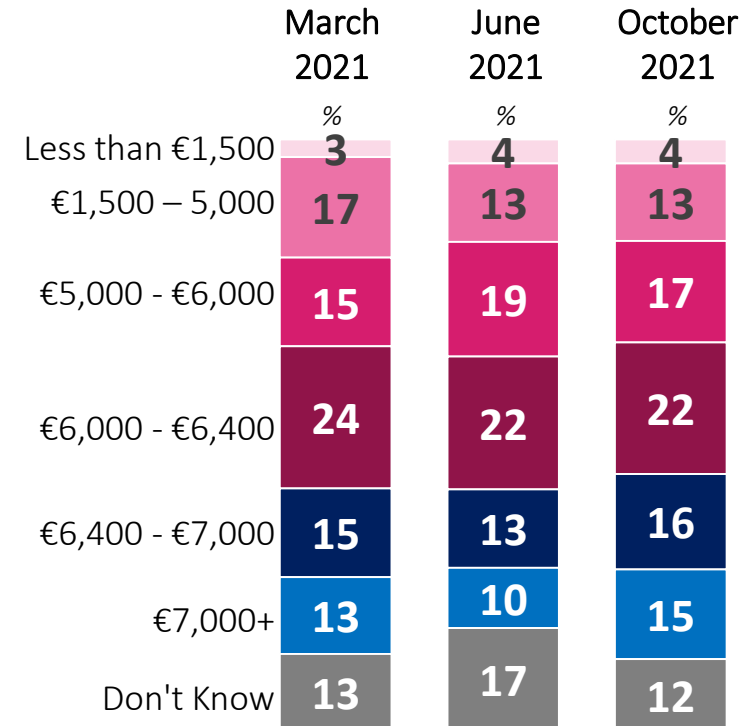
Profile of taxi licences held

Base: 331 taxi drivers who own a licence and do not drive a WAT

Year Purchased Taxi Licence



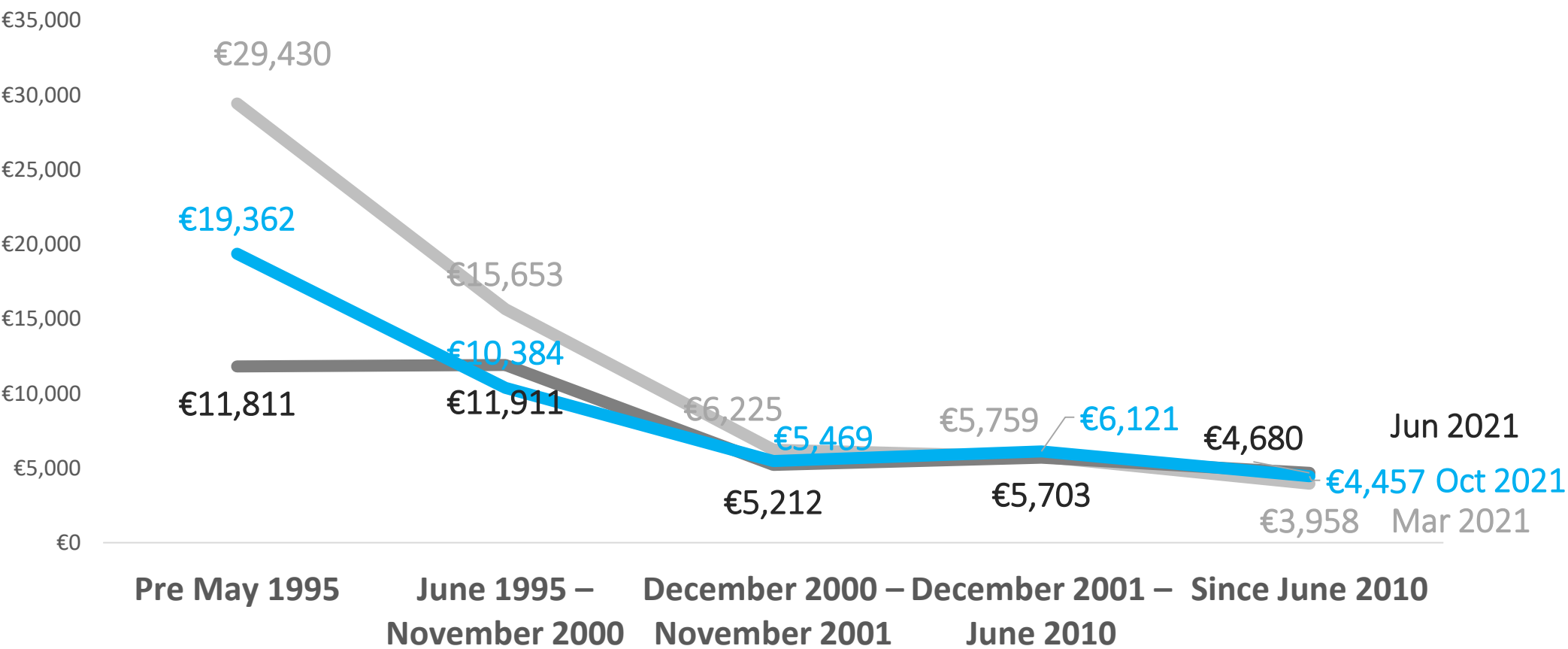
Fee Paid for Taxi Licence



Little change over the course of the three waves in reported year purchased taxi or price paid for it.

Average licence fee paid by year

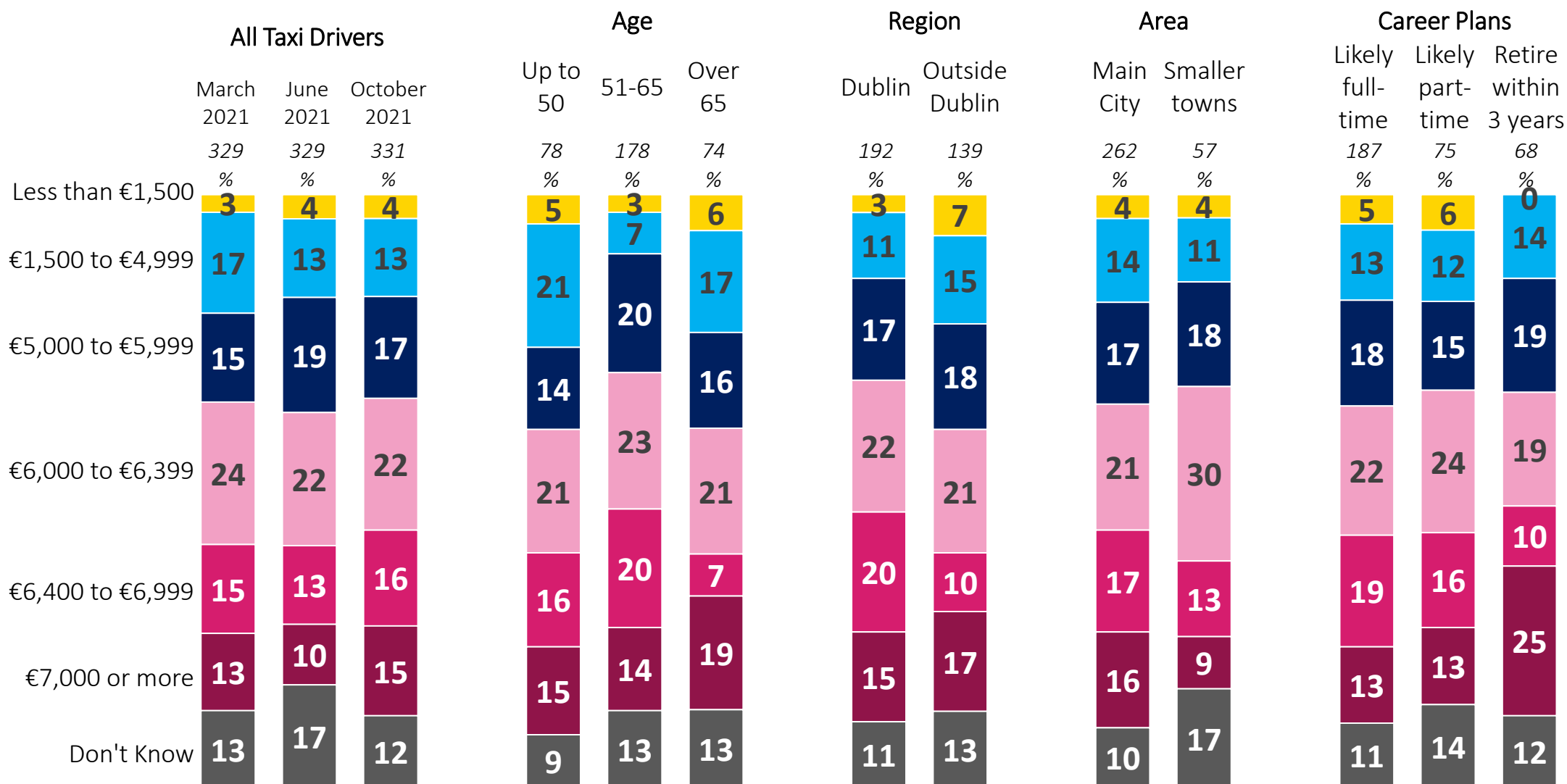
Base: 331 taxi drivers who own a licence and do not drive a WAT



Base sizes of those who purchased their vehicle prior to December 2001 are very small and thus the data is less reliable.

How much paid for taxi licence x taxi driver profile

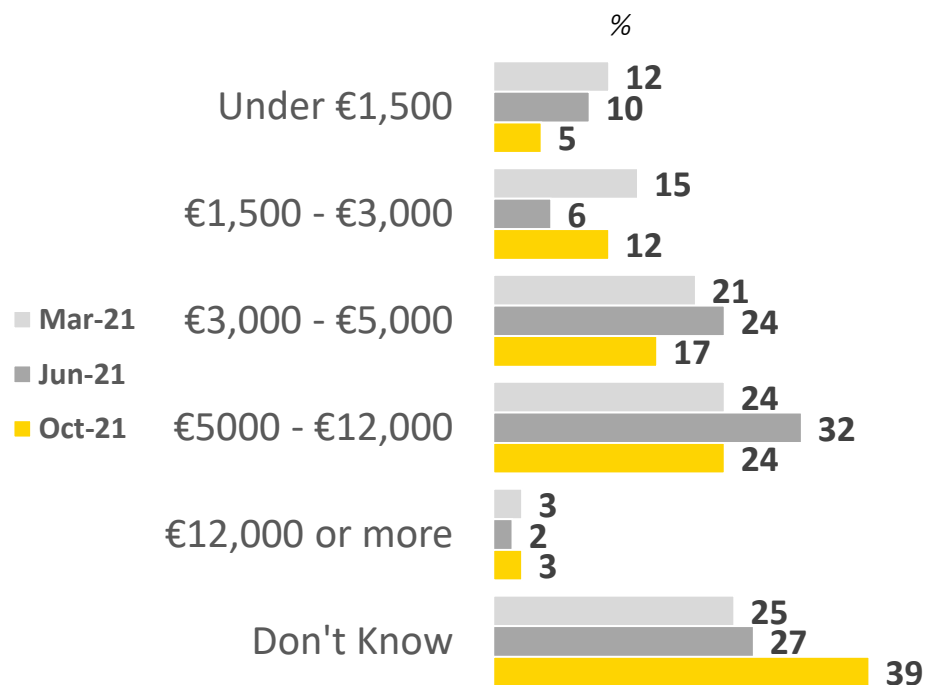
Base: 331 taxi drivers who own a licence and do not drive a WAT



Higher incidence of paying less than 5k among younger drivers and those outside Dublin.

Price would consider good value if option to buy

Base: 80 taxi drivers who rent their vehicle



Average Amount Suggested Oct 2021: €4,137

Average Amount Suggested Jun 2021: €4,191

Average Amount Suggested Mar 2021: €3,969

Average Amount Suggested Sept 2020: €5,499

Age		Likely work full-time
Up to 50	51-65	
56	21*	58
%	%	%
4	8	5
16	4	13
21	10	15
14	45	23
4	-	3
42	33	40
€4,054	€4,141	€4,238

Slight decrease in average price would consider to be good value in comparison with June 2021.

*Caution: small base

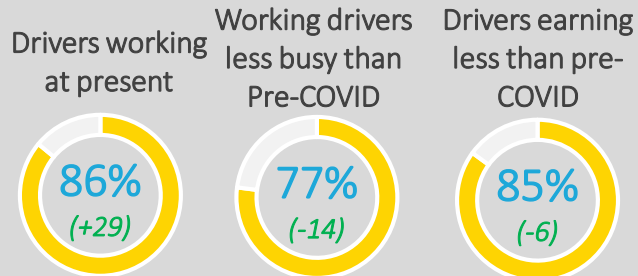


Key findings

Key Findings

IMPACT OF COVID-19

- A **slightly more positive picture** emerging in October 2021:

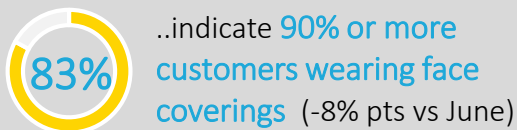


- There has **been a further slight improvement for those still feeling the effects** (although must note that **many are still in a tough situation** in comparison to pre-COVID):

Among those less busy, business
-44%
(-56% in June)

Among those earning less, income
-48%
(-60% in June)

- We see a **drop in reported mask wearing by customers** in comparison with June 2021:

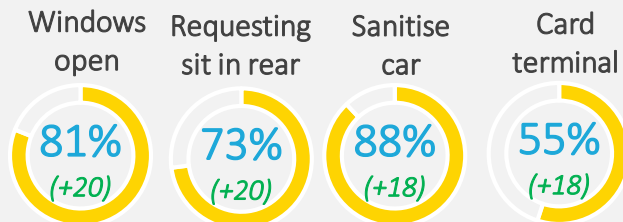


COVID MEASURES

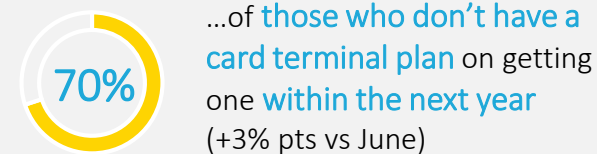
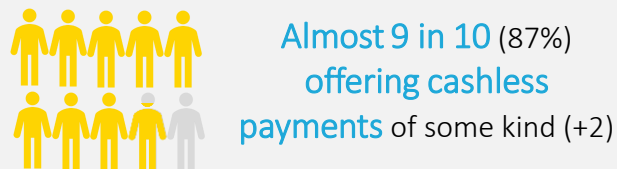
- An increase noted in adherence to most measures:

Implementing **6.8 measures** on average vs 6.1 in June

- Most substantial increases:



- Incidence of offering cashless payments continues to trend upwards:



LICENCING LAWS

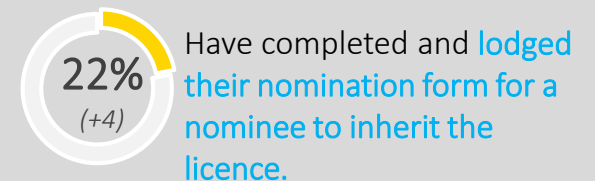
- Marginally fewer aware you can rent out your vehicle when you retire, but marginally more are likely to:



- Most common reason for being unlikely:



- Meanwhile, **fewer believe** it would **not be worth it financially**: -6% pts to 10%.



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.