



Údarás Náisiúnta Iompair
National Transport Authority

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

Quantitative Survey
September/October 2021

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





Introduction

Introduction

- This report details the findings of a representative survey of taxi users in Ireland **(September/October 2021)**. This is the fourth iteration of this study.
- It sets out to understand current and expected taxi usage with a focus on understanding the impact of the pandemic. The information is to help plan the future of the industry for the future.
- 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:

1,038 adults
642 Used taxi in past year
211 Fortnightly taxi users
201 used taxi in past fortnight



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:

23rd September – 4th October.

Context:

Limited restrictions in place as masks continue to be a requirement in crowded spaces. Fieldwork finished before further changes to restrictions on 22nd October.



B&A Acumen Panel

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

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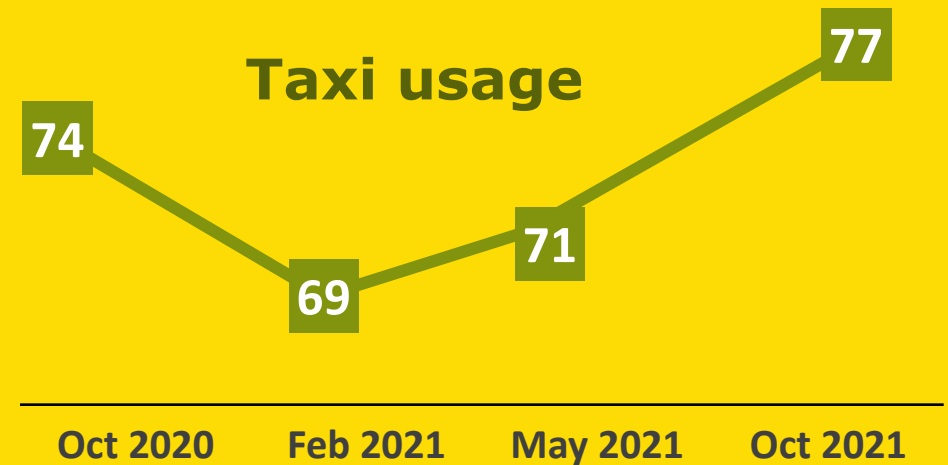
5. Key findings



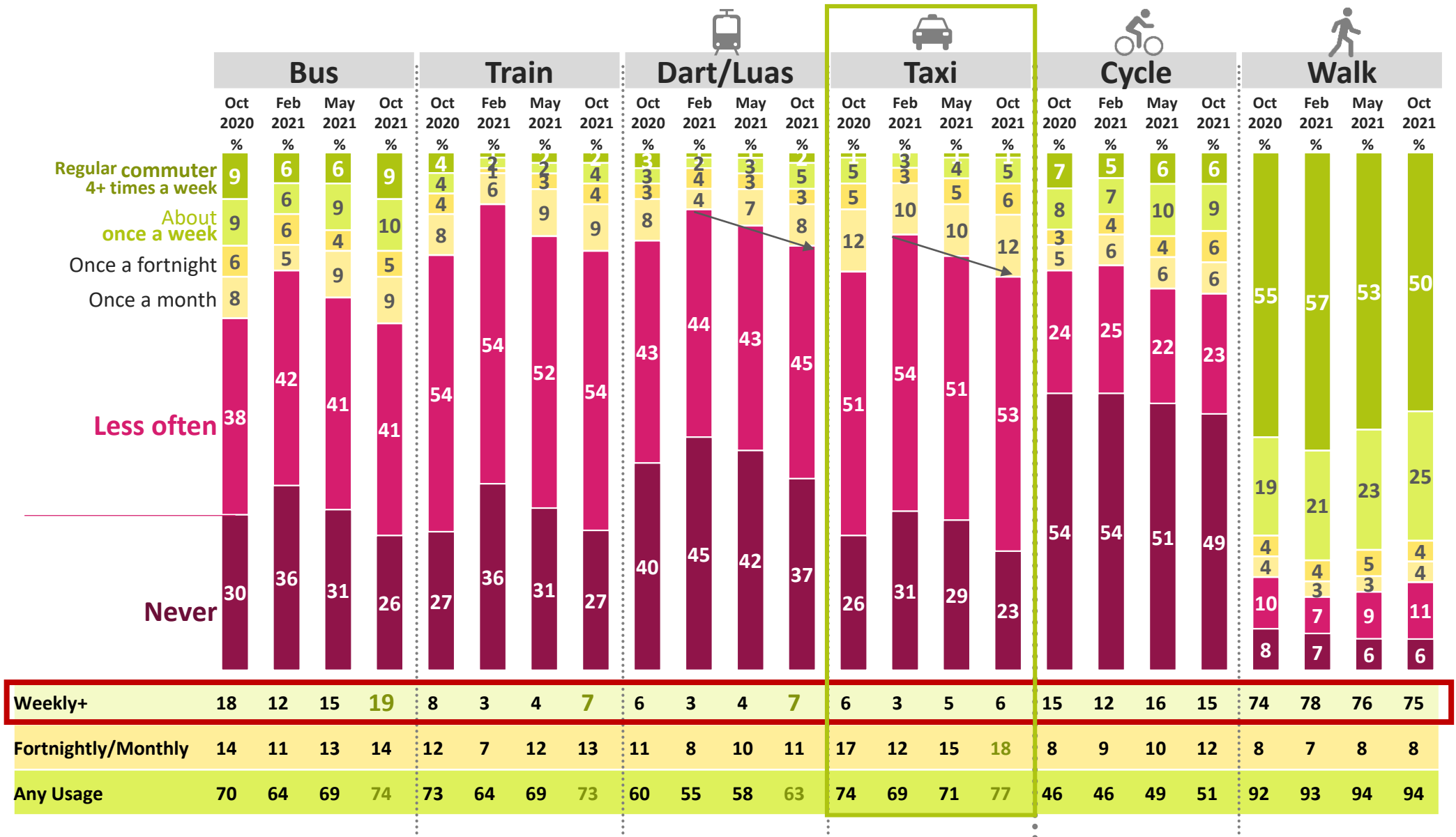
1. Taxi usage in context of public transport usage in general



There has been an increase in the size of the taxi user base compared with May. This is welcome on the back of limited growth post a decline in February 2021 (Level 5)

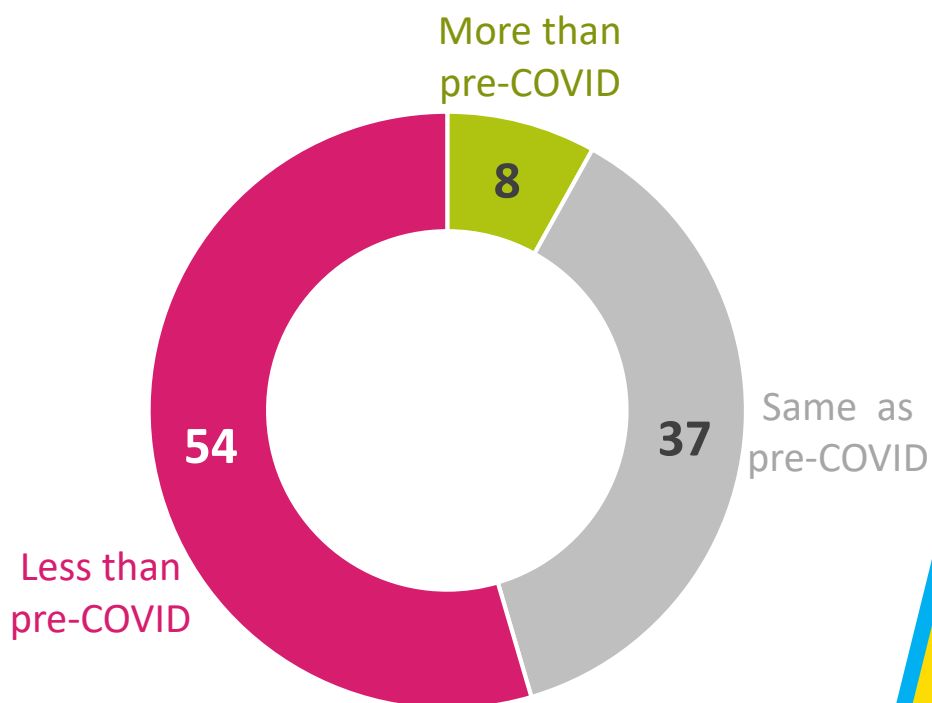


There has been a clear increase in the size of the weekly user for bus, train and tram while the same user base for taxi, cycling and walking remains largely unchanged.



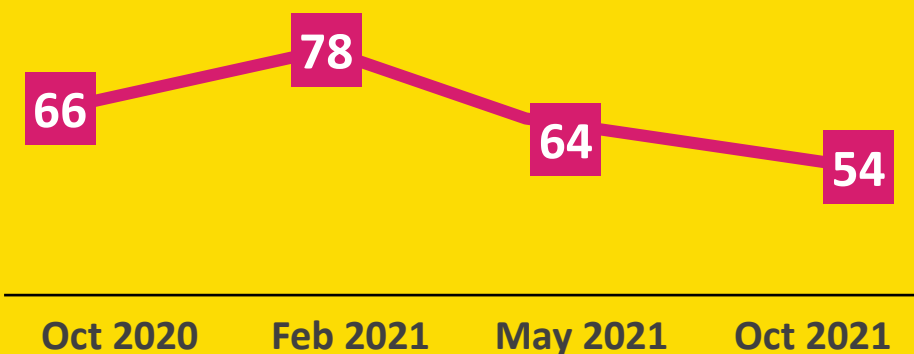
Base: All adults 1,038

Almost 2 in 5 (37%) using taxis as often as they were pre-COVID



Backing that up, fewer people are reporting reduced usage of taxis compared with pre-Covid (down from 78% in Feb 2021 to just 54% in October).

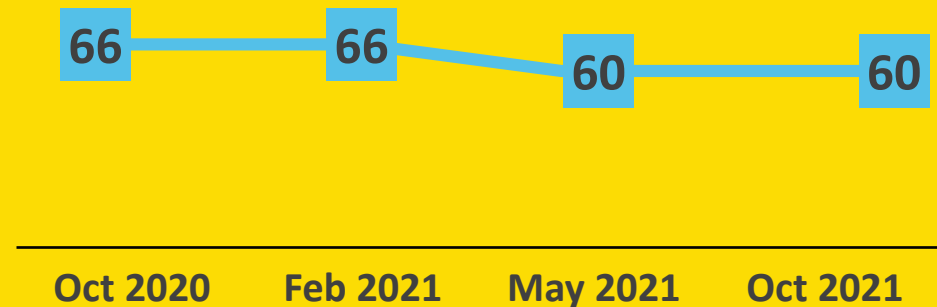
% using taxis less frequently than pre-COVID





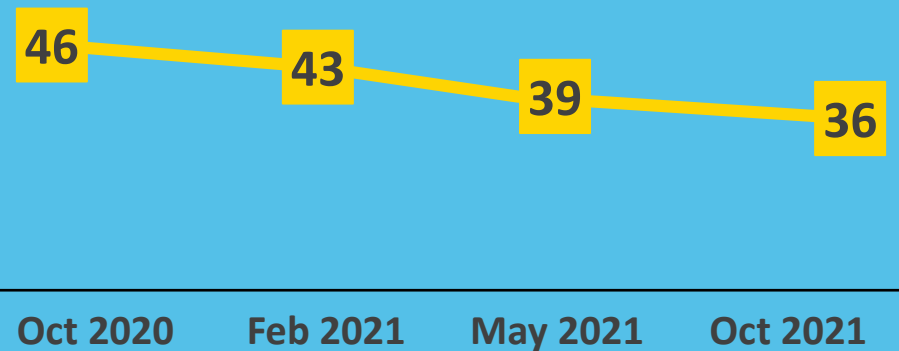
The most common reason for reduced usage continues to be 'going out less'

% using less taxis because going out less



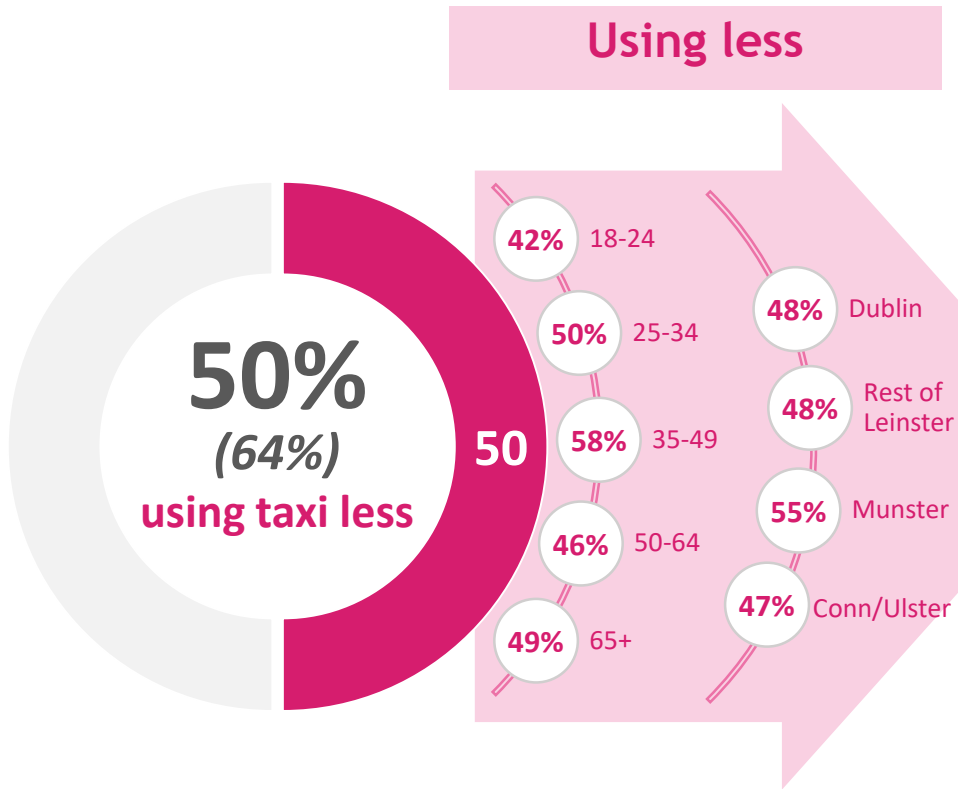


Importantly, the % using taxis less often because of a **conscious effort to minimise risk** of contracting COVID has been **steadily declining** over the past year

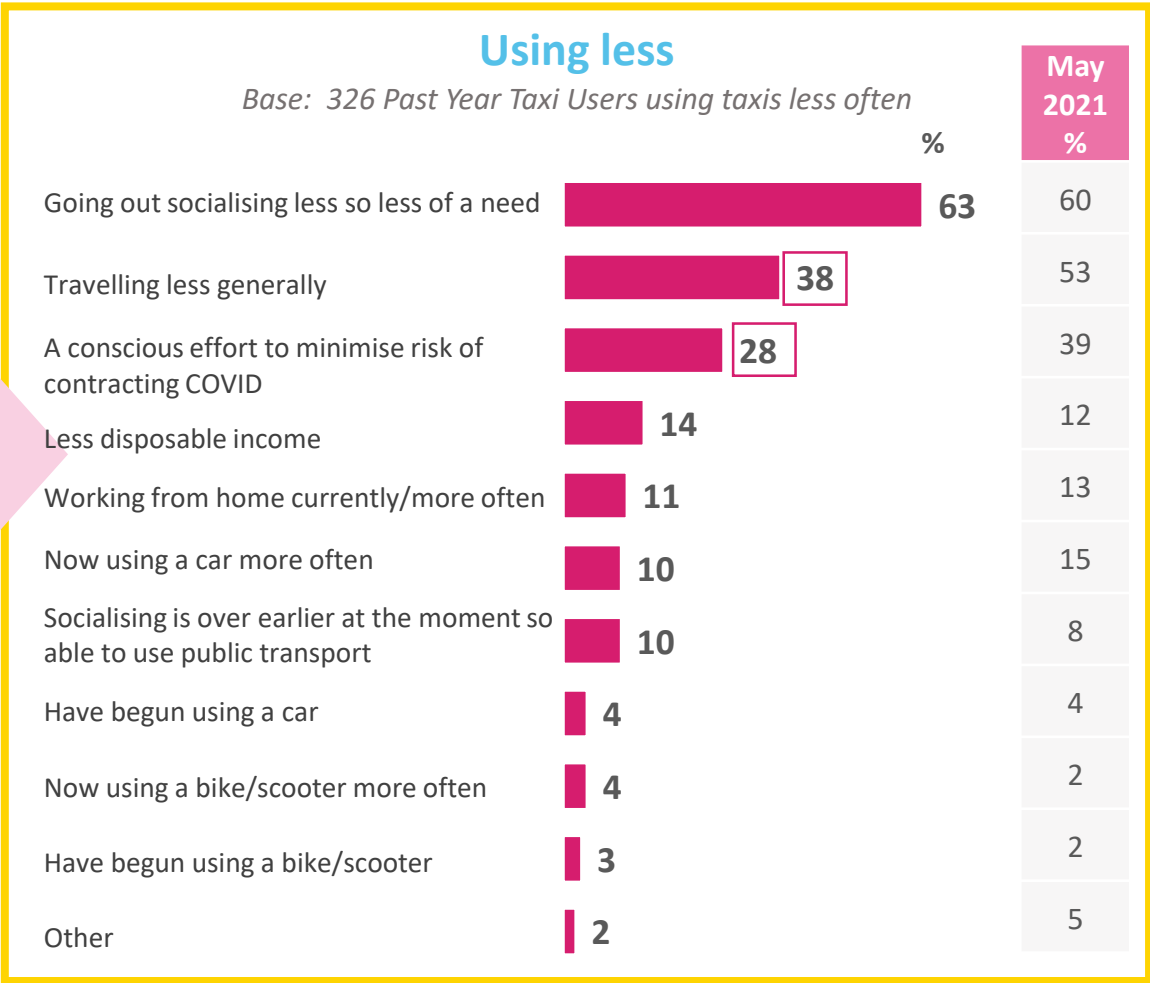


Fewer avoiding taxis because they are travelling less often or attempting to minimise the risk of contracting COVID, but socialising less frequently remains at 63%

Base: All taxi users past year 642



Lower incidence of reduced taxi usage reported (50% in Oct vs 64% in May) which is a shift in the right direction.



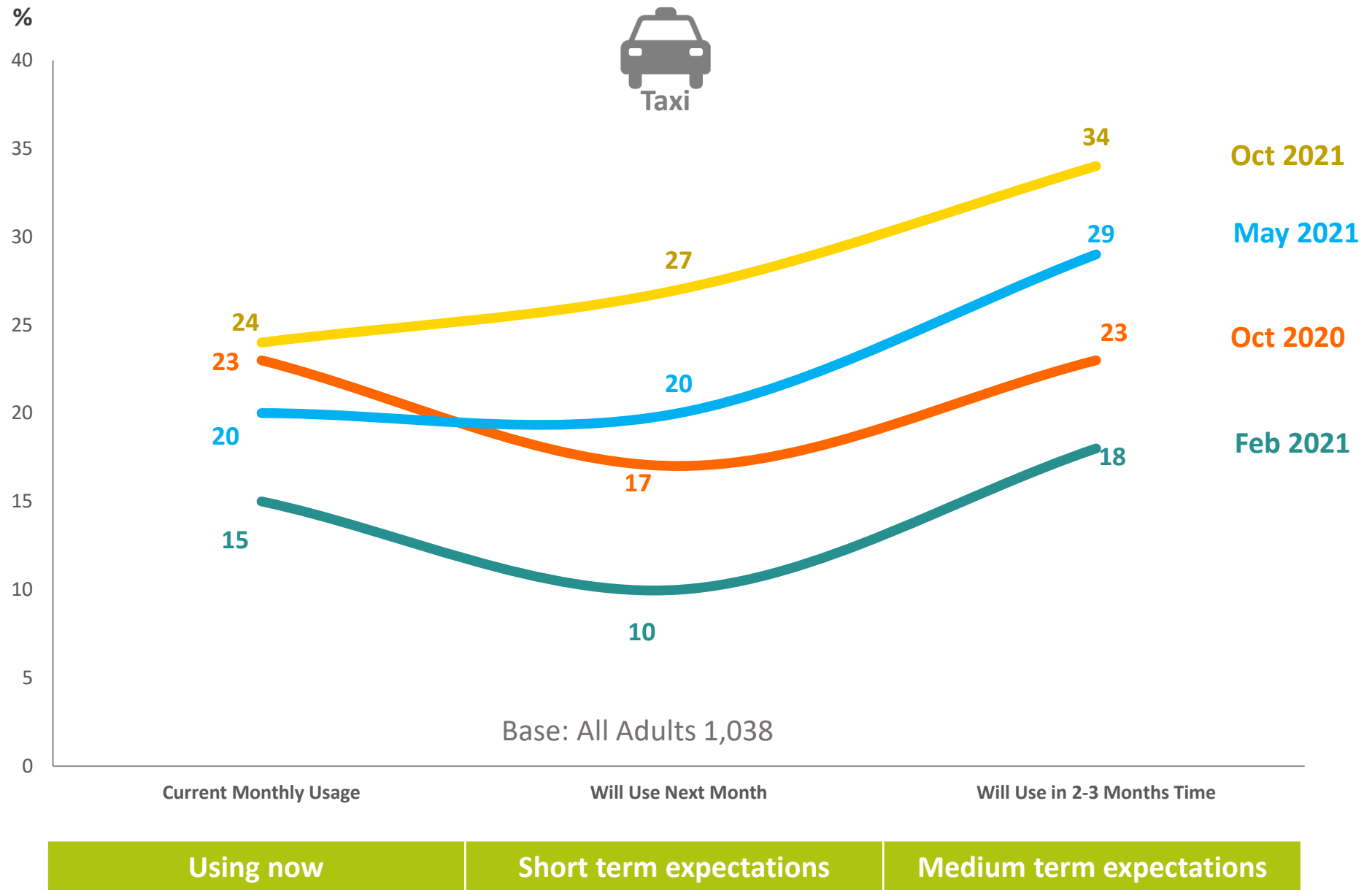
() = May 2021

When we review projected usage in 2-3 months time, there is a much more positive picture for all modes including taxi

Base: All Adults 1,038



Taxi: Current and projected usage: Interestingly, similar proportion predicting usage next month (27%) as were predicting that level of usage in 2-3 months time in May (29%). All indicators showing a positive picture emerging for taxi usage



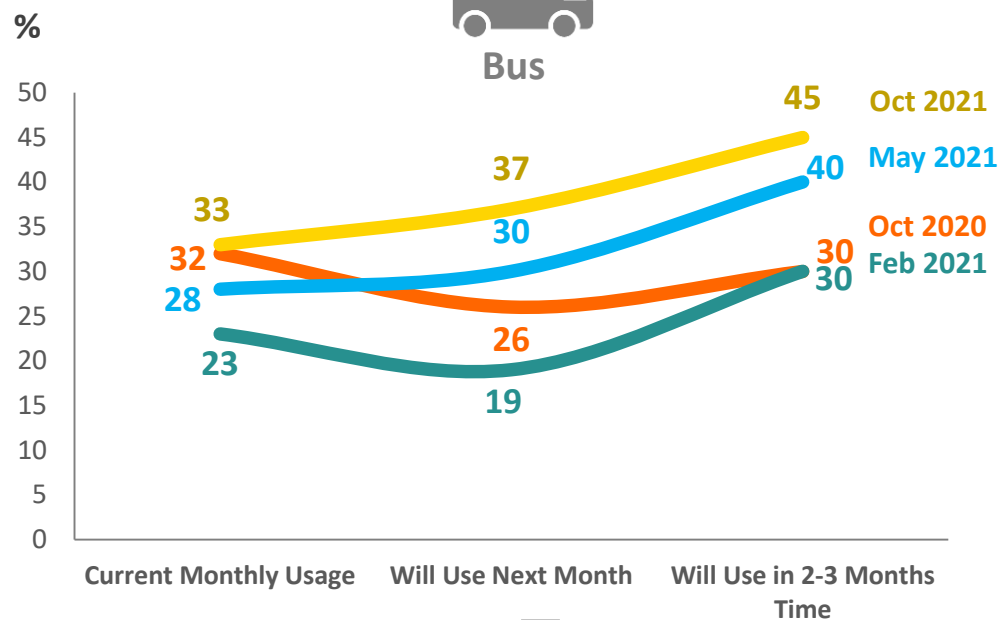
Summary: Public transport current and projected usage:

A much more positive picture emerging for taxis in October 2021.

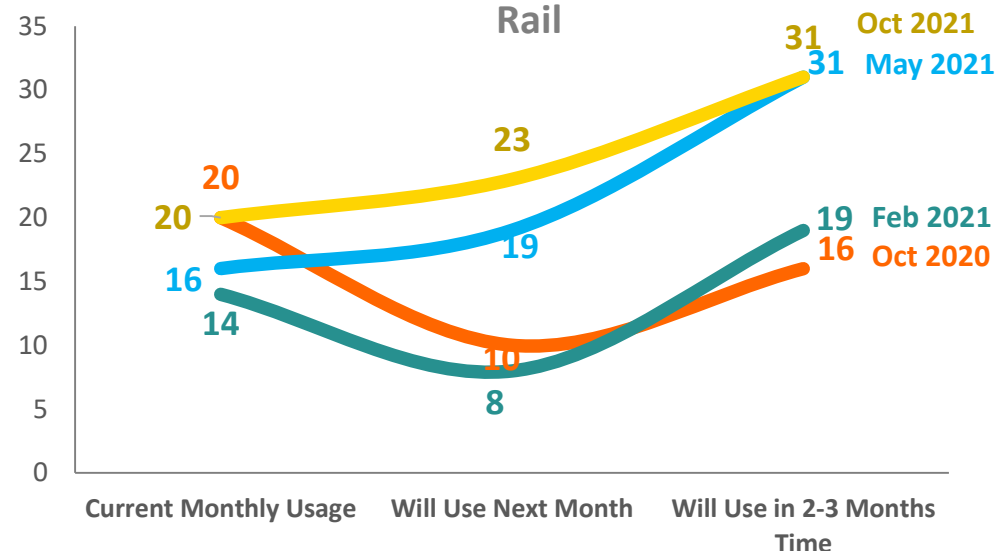
Base: All Adults 1,038



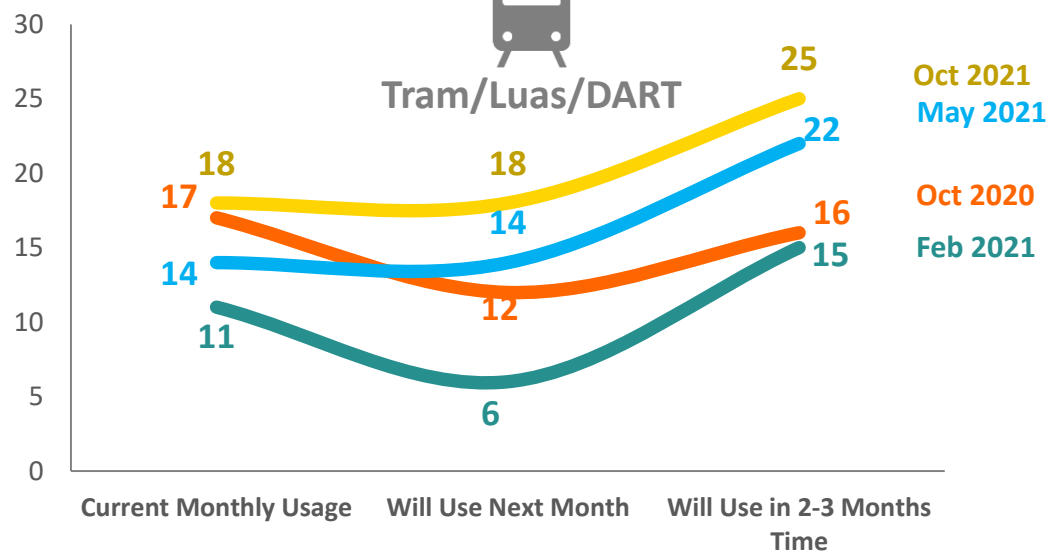
Bus



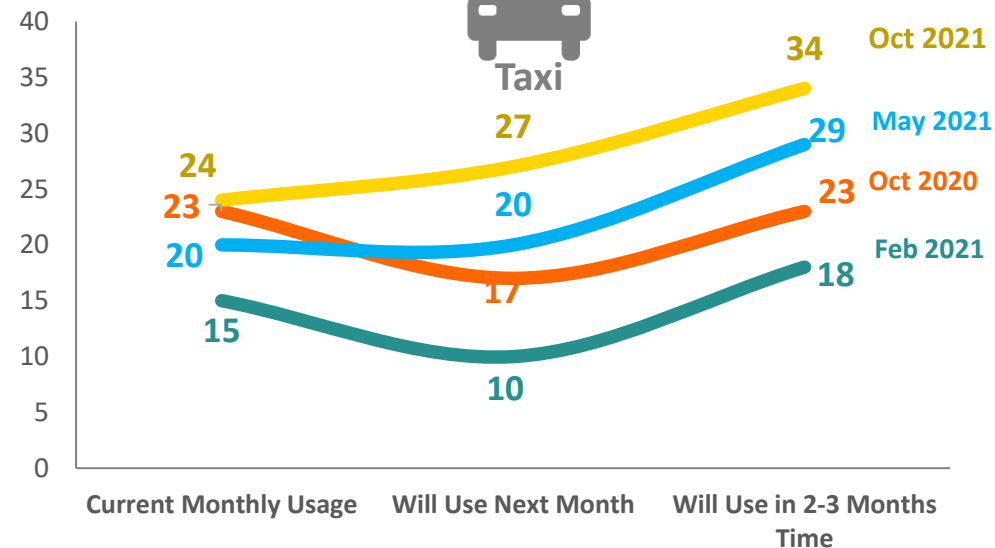
Rail



Tram/Luas/DART

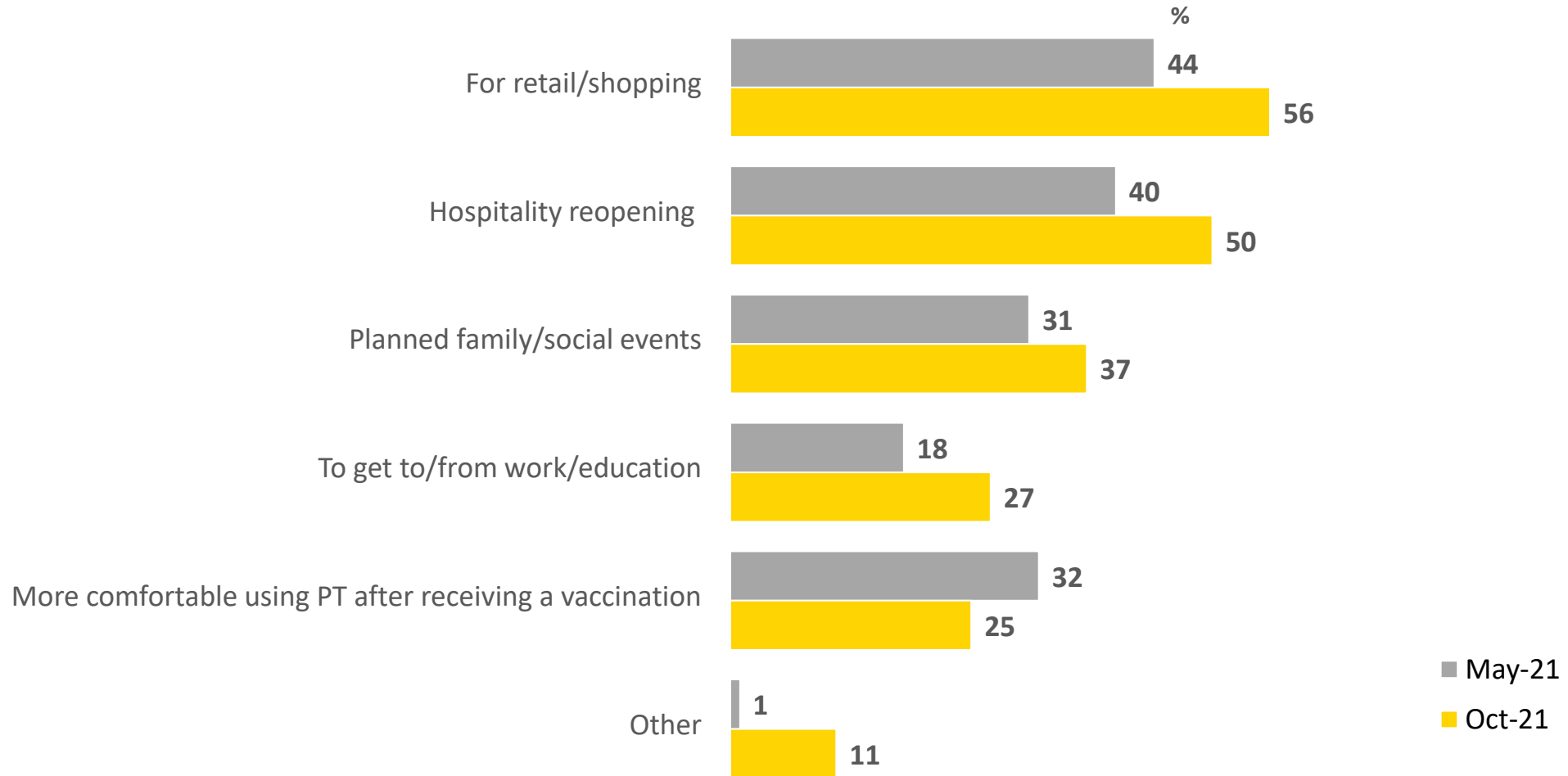


Taxi



Wider multiplicity of projected usage this wave for public transport with retail and hospitality continuing to lead demand.

Base: All likely to use PT over the coming weeks - 644



Weekly+ taxi users over index on being likely to use PT in near future for retail, hospitality and/or because they feel more comfortable having received a vaccination

Base: All likely to use public transport - 644

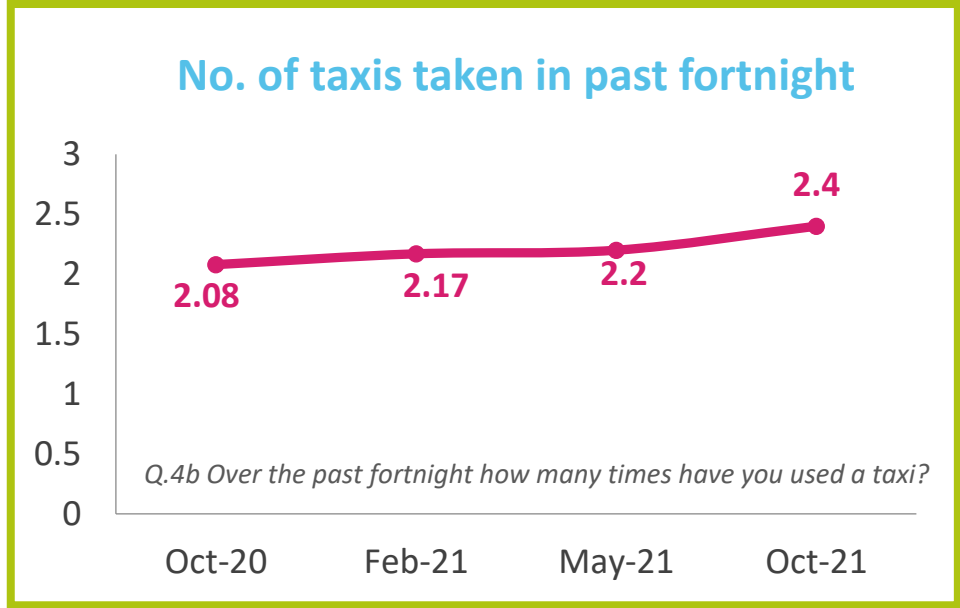
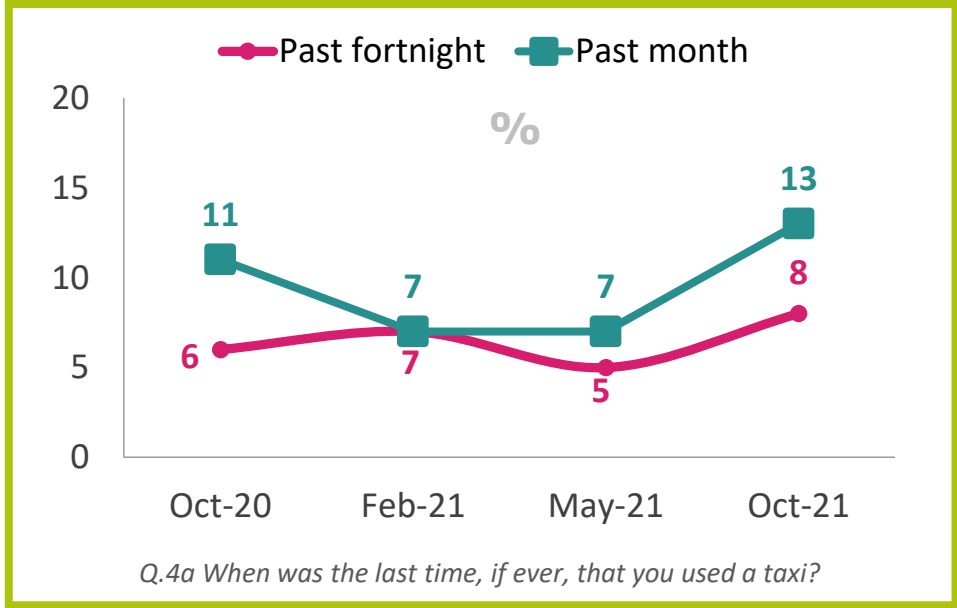
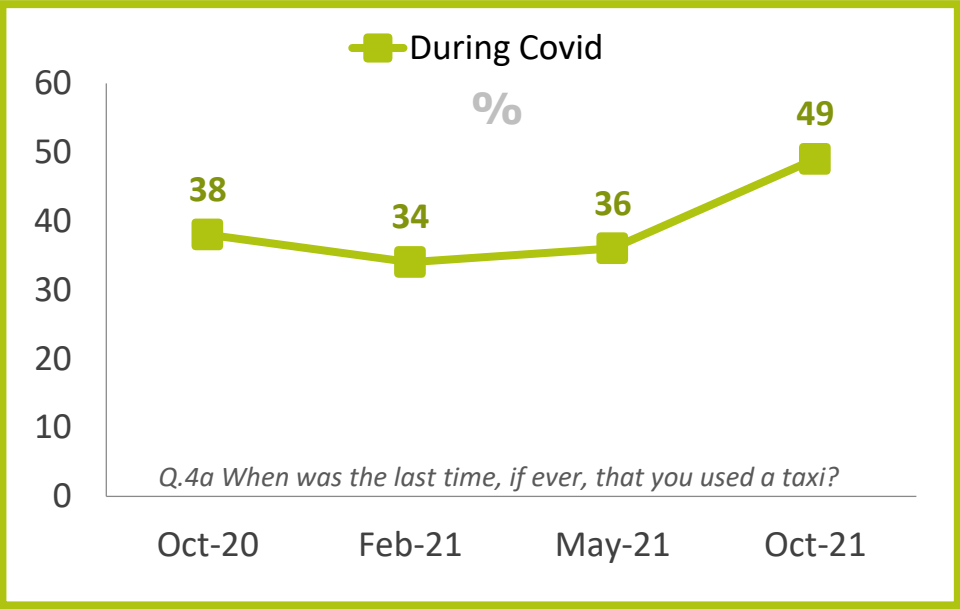
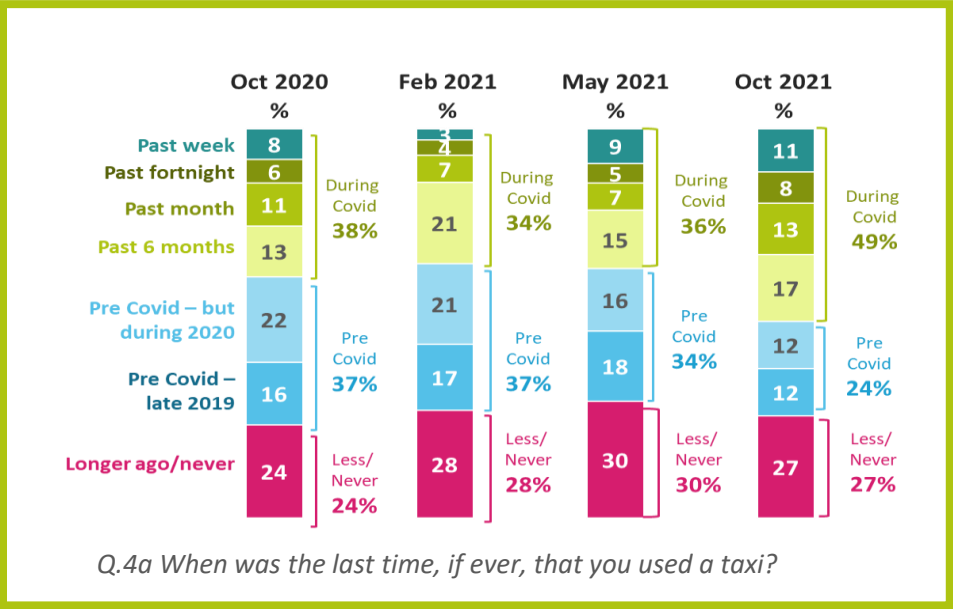
	Total	Current usage							
		Bus frequency		Train Frequency		Tram/Luas Frequency		Taxi Frequency	
		Weekly+	Less often	Weekly+	Less often	Weekly+	Less often	Weekly+	Less often
<i>Base (unweighted):</i>	644 %	182 %	392 %	64 %	472 %	60 %	403 %	64 %	500 %
For retail/shopping	56	57	48	57	48	58	51	63	52
Hospitality is reopening (e.g. bars, restaurants, etc)	50	65	54	68	56	68	59	60	55
Planned family/social events	37	30	24	40	25	34	27	27	25
To get to/from work/education	27	39	38	36	39	37	38	29	39
I am more comfortable using PT after receiving a vaccination	25	47	21	48	26	52	27	34	27
Other	11	6	12	5	11	5	11	5	11



2. How has consumer demand changed?

Proportion who have used a taxi during COVID continues to grow : +13% pts vs May 2021. Encouragingly, average number of taxis taken in past fortnight has increased : up to 2.4 from 2.2.

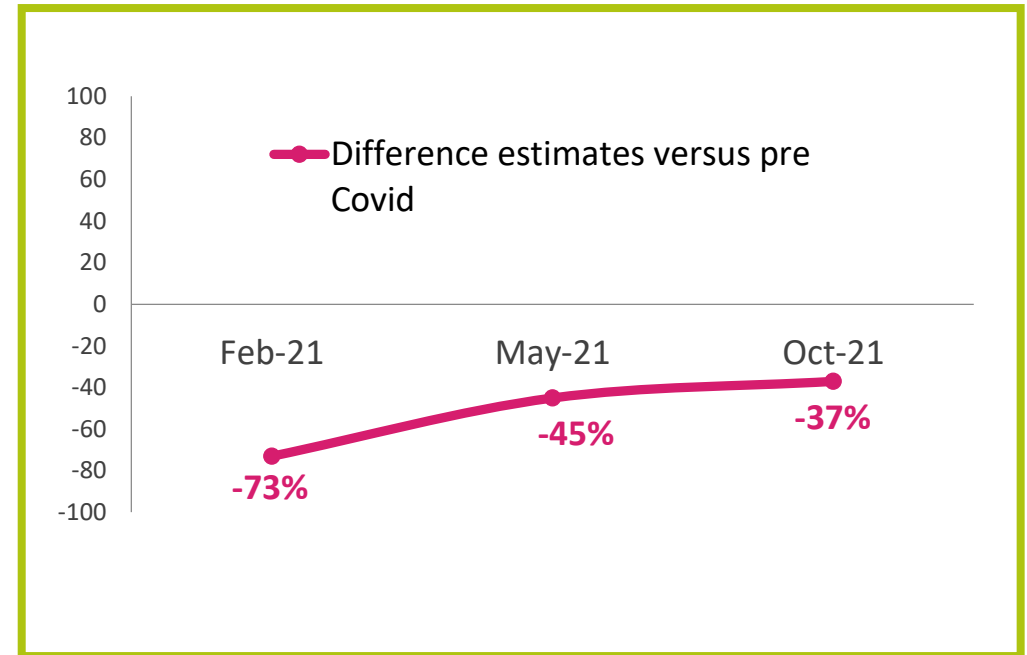
Base: All Adults 1,038



Grossing that up to population we estimate a 36% increase in volume on past fortnight taxi journeys since May. Best estimates is that current operations now 37% lower than pre-Covid but this is still a significant improvement compared with earlier this year.

Base: All taxi users past fortnight

Frequency	User base estimates			
	Oct 20	Feb 21	May-21	Oct-21
Past week/weekly	300,000	120,000	320,000	430,000
Past fortnight	225,000	130,000	190,000	300,000
Fortnight average	2.08	2.17	2.20	2.40
Journeys past fortnight	1,092,000	542,000	1,122,000	1,752,000
		-50%	+52%	+36%



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

Taxi usage comparisons (multi-day usage included). **Shift evident towards weekend and evening/night time usage**

Base: All used taxi in past two weeks - 201

Day of week used over past fortnight

	Feb '21	May '21	October '21
<i>Base (unweighted):</i>	79	146	201
	%	%	%
Monday	23	17	18
Tuesday	19	17	20
Wednesday	24	20	21
Thursday	24	22	19
Friday	37	30	31
Saturday	19	34	39
Sunday	8	7	11
Average days usage	1.54	1.47	1.59

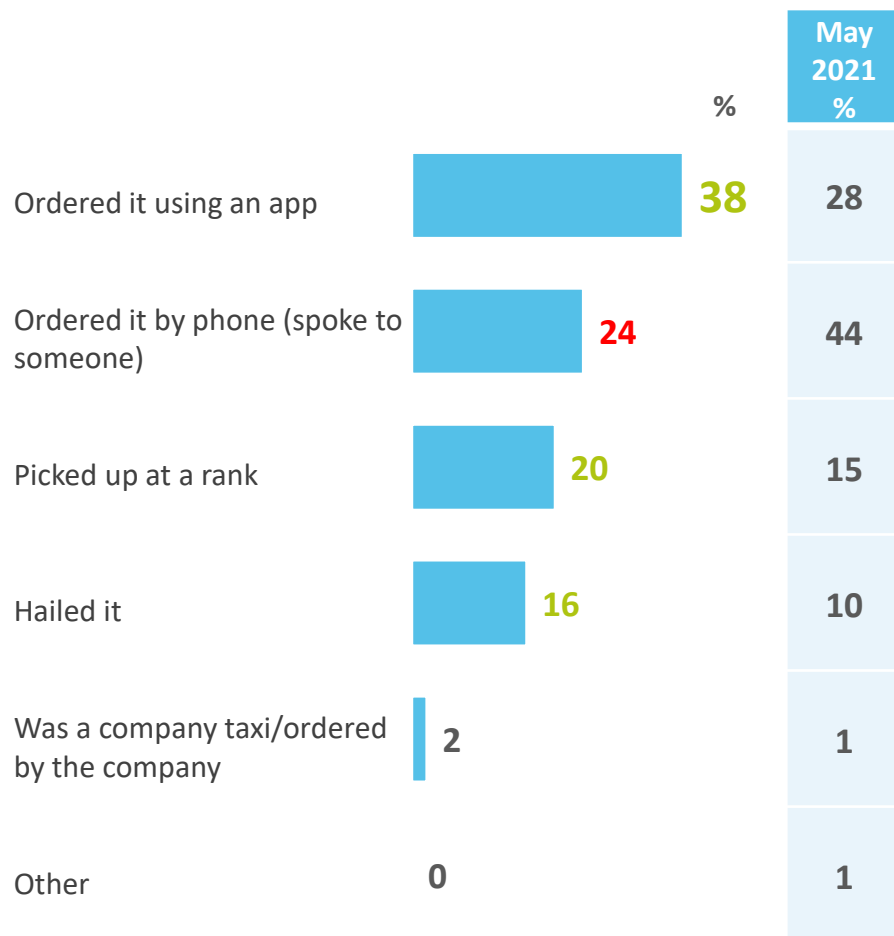
Time of day taxi used over past fortnight

	Feb '21	May '21	October '21
<i>Base (unweighted):</i>	79	146	201
	%	%	%
06:00 – 07:59	8	6	8
08:00 – 09:59	15	9	11
10:00 – 11:59	8	16	17
12:00 – 13:59	22	17	17
14:00 – 15:59	29	18	13
16:00 – 17:59	21	14	15
18:00 – 19:59	18	12	19
20:00 – 21:59	10	14	18
22:00 – 23:59	8	15	25
00:00 – 03:59	5	19	12
04:00 – 05:59	1	2	2

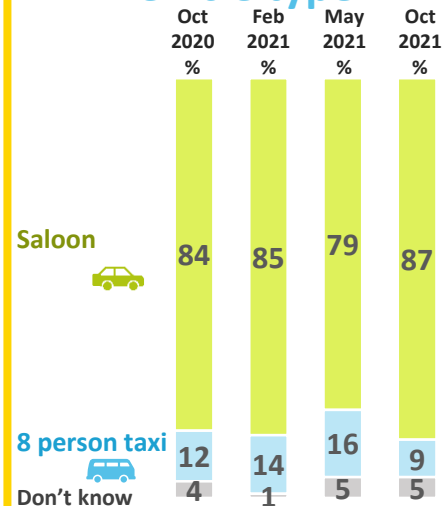
Recent taxi usage norms: App usage has grown, along with on street access. There is evidence of a steady increase in taxi usage at the weekends, particularly Saturday, along with more being used between 10p.m and midnight. Slightly longer journey durations also.

Method used to get most recent taxi

Base: All used taxi in **past fortnight** – 201



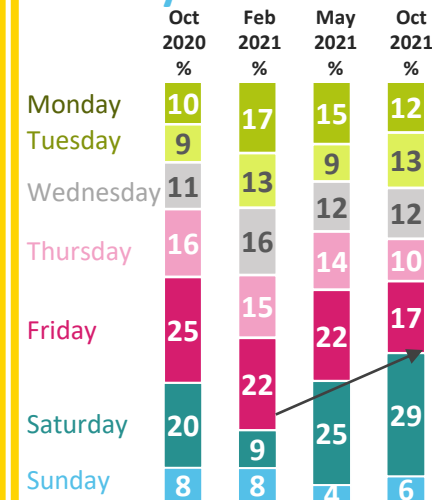
Vehicle type



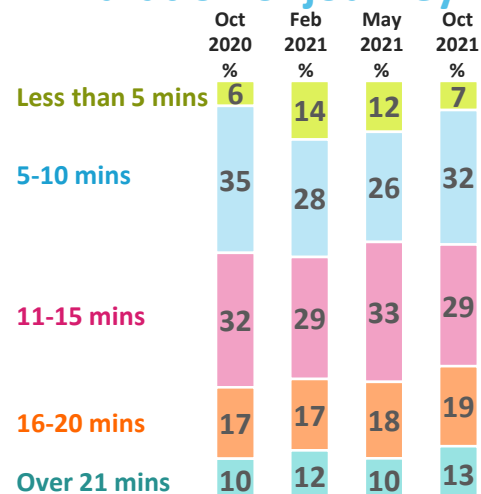
23%

(23%)
of taxis used
had
wheelchair
access

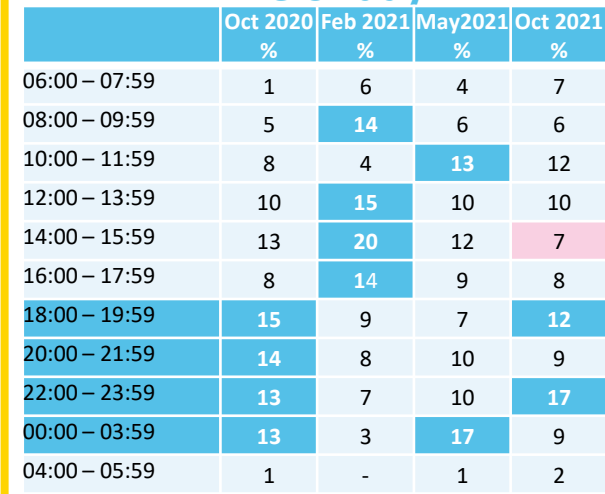
Day of week



Duration of journey



Time of day

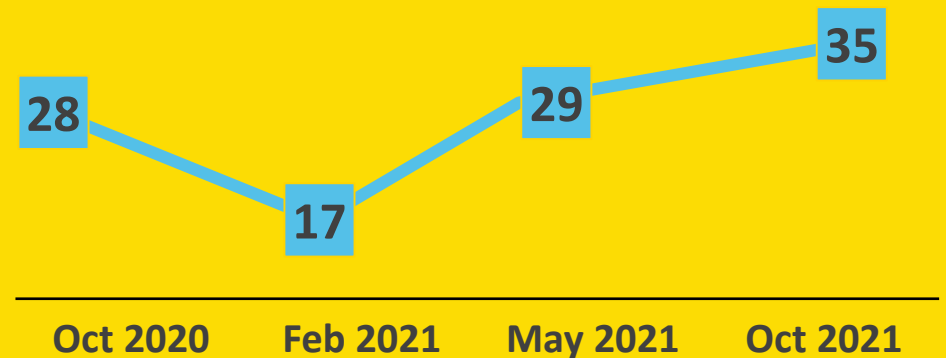


Base: All used taxi in **past fortnight**.
Reference to most recent journey



The easing of restrictions has resulted in a shift in taxi usage trends to weekends.

% most recent taxis taken on weekend (Sat/Sun)

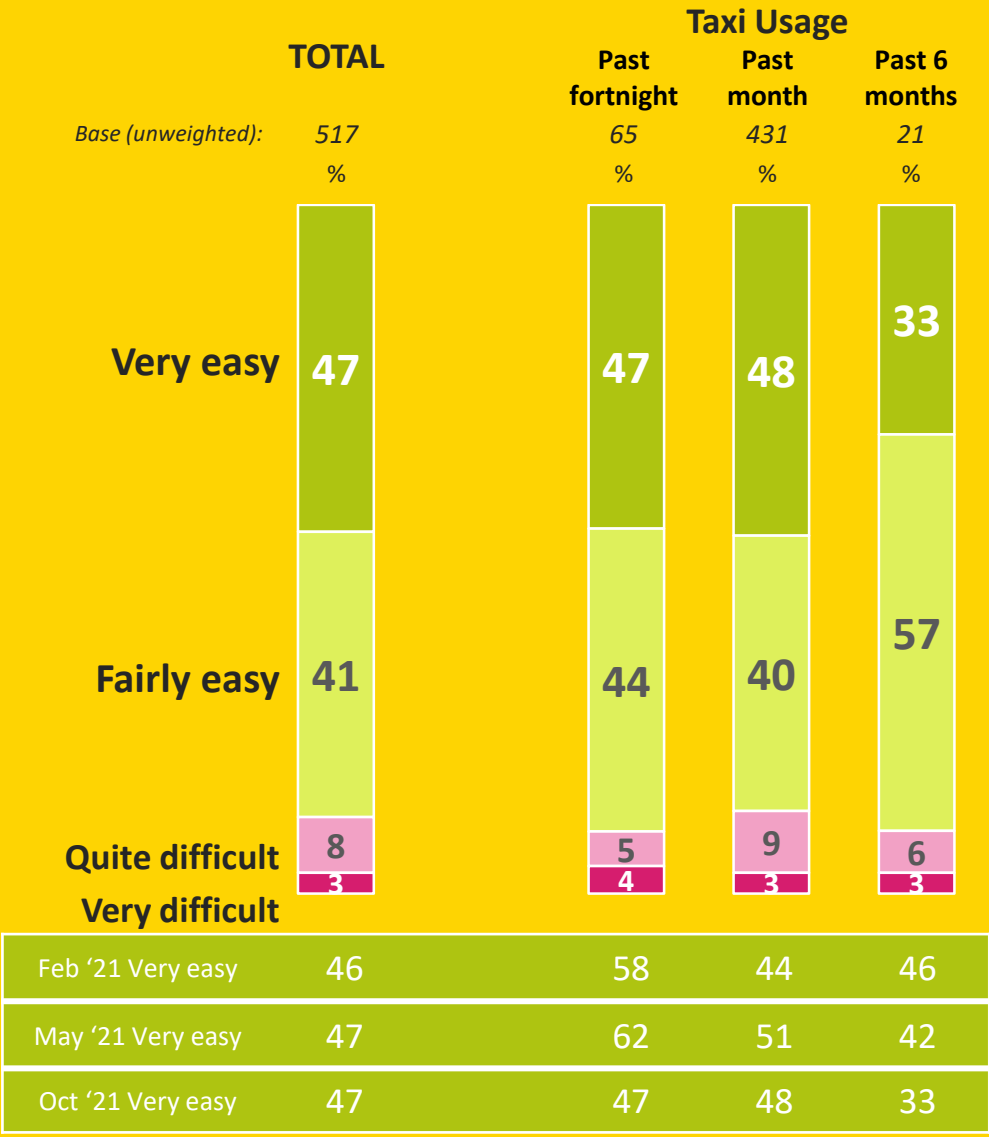




Ease of getting a taxi?

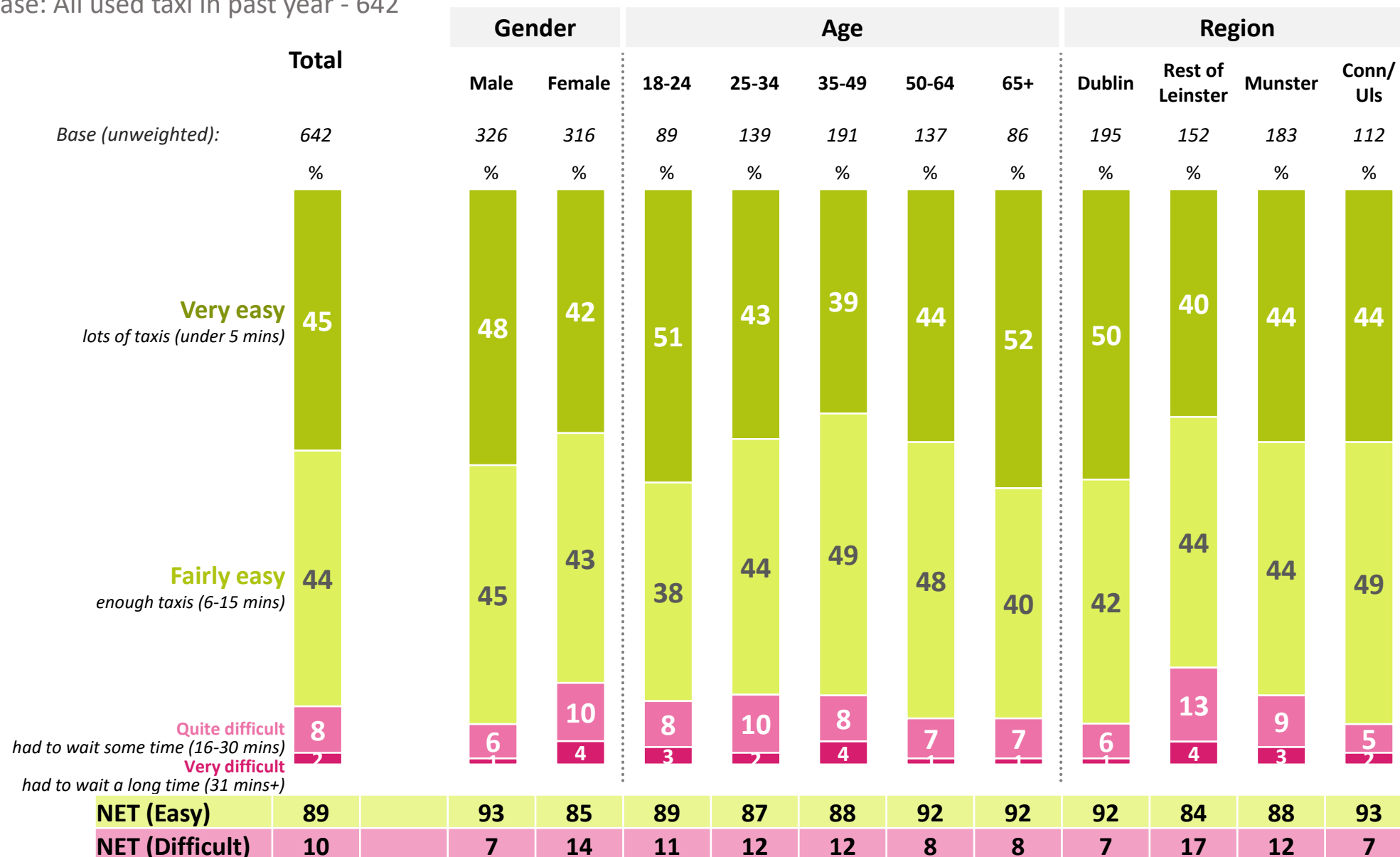
Base: All used taxi since Covid - 517

89%
found it easy to get a taxi on
last occasion



Vast majority (89%) indicate it was very/fairly easy to get their last taxi. Marginally higher among men, older adults, Dubliners and Connacht/ Ulster dwellers

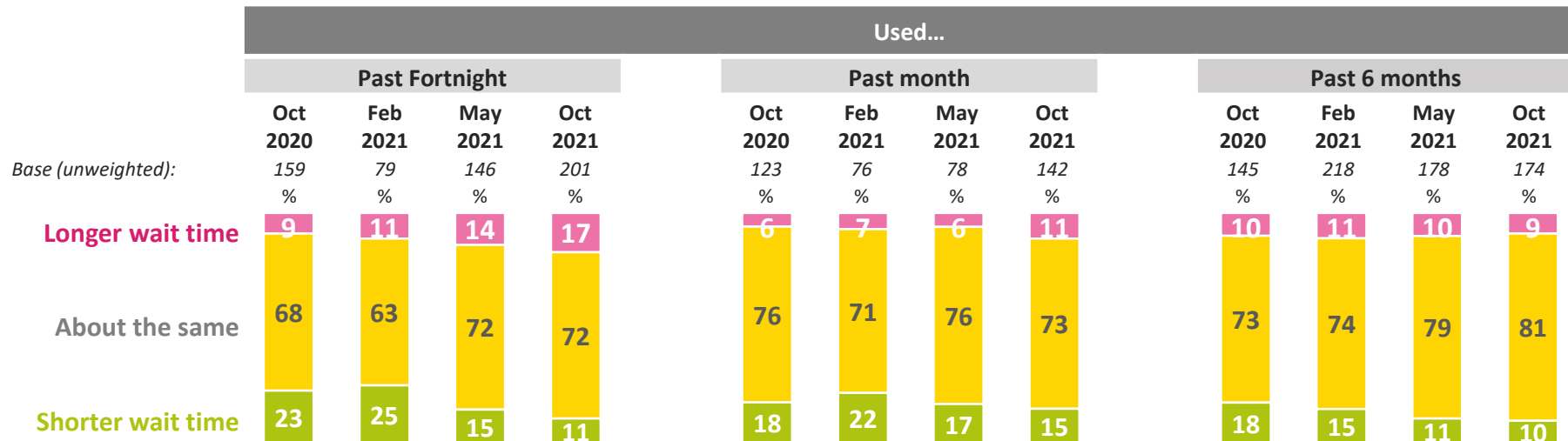
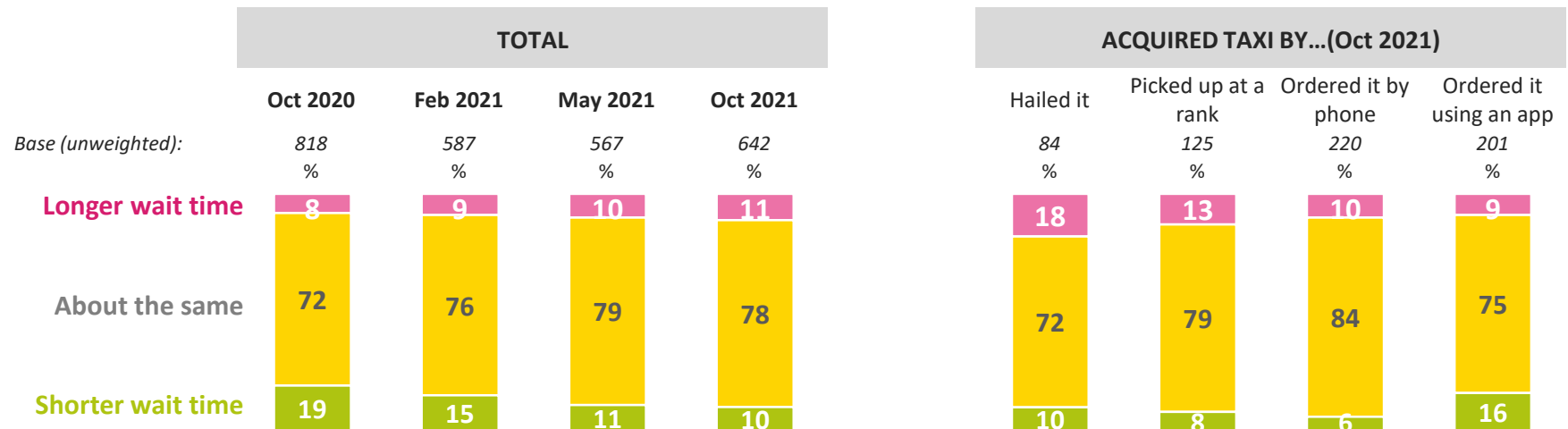
Base: All used taxi in past year - 642



Wait Time: Majority continue to report that wait time is much the same as pre-Covid

Base: All used taxi in past year - 642

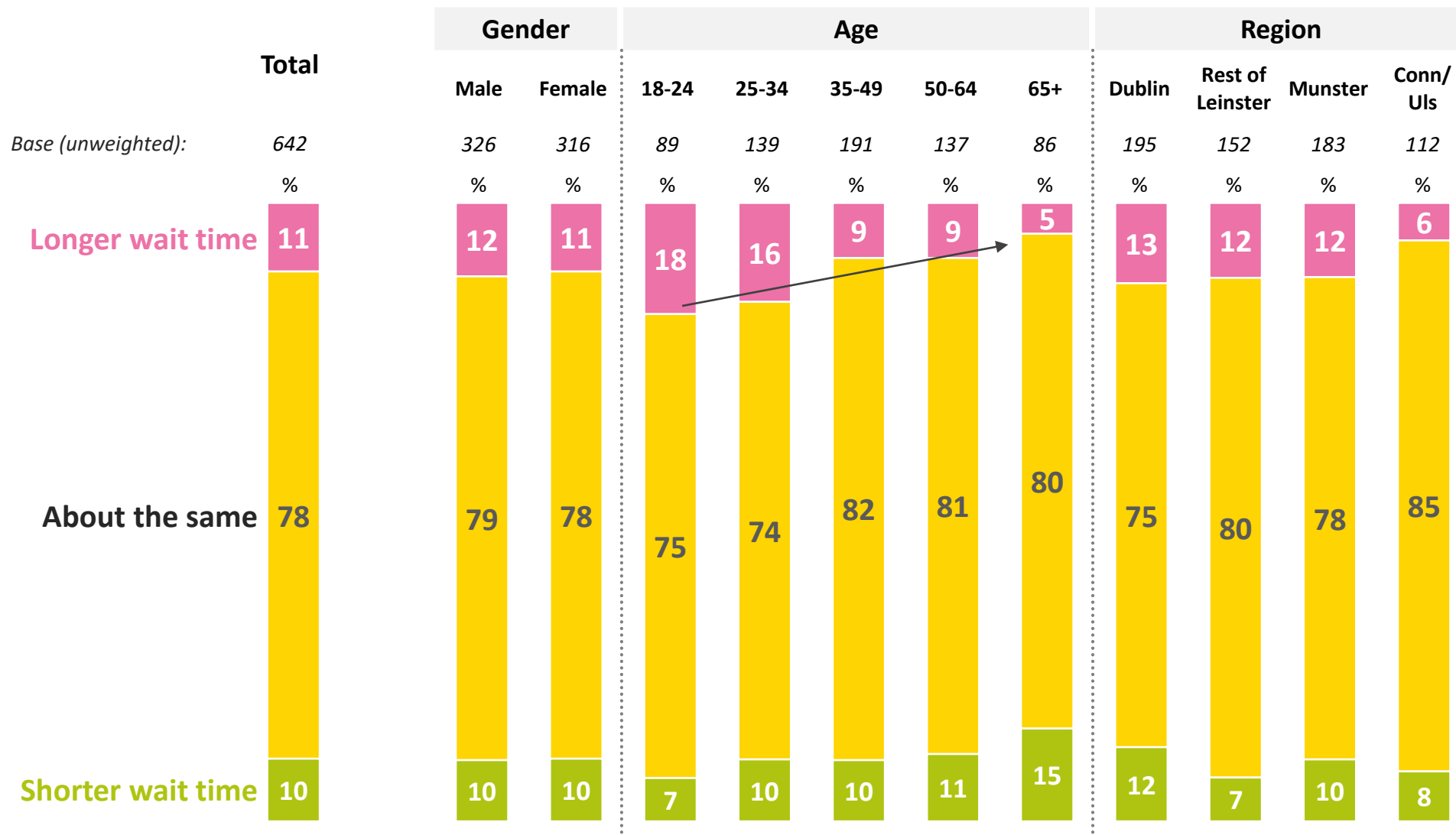
Wait time compared with pre Covid



Wait time: Younger adults more likely to be reporting longer wait times than others, although even among this group, the majority report wait times are much the same as pre-COVID

Base: All used taxi in past year - 642

Wait time compared with pre Covid



In line with changing restrictions, there is a much higher proportion using taxis for leisure purposes this wave ('going out'), with fewer visiting family/friends in their homes

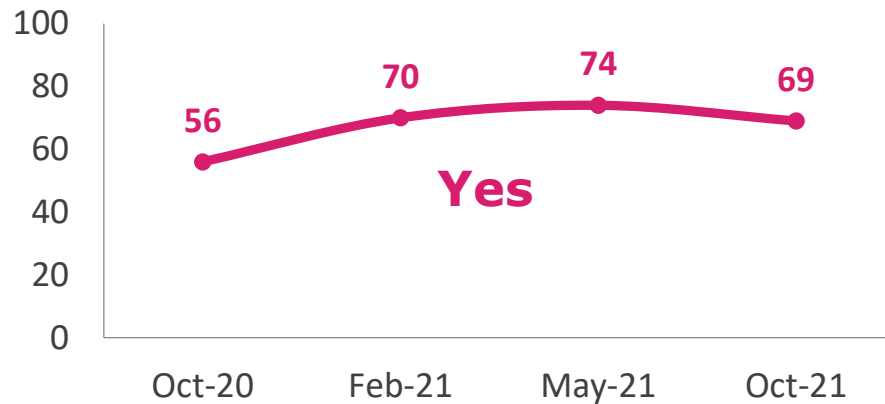
Base: All used taxi in past fortnight - 201

	Taxi Usage		
	Past Fortnight		
	Feb '21	May '21	Oct '21
	79	146	201
	%	%	%
For leisure purposes (restaurant, pub, art/culture event I attended, other paid for leisure activities)	2	19	42
Visiting friends/family in their homes	17	24	8
Essential hospital visit or medical appointment (GP, Physio, Dentist, Optician etc.)	17	6	6
Work	25	25	20
Shopping/Shops	29	15	9
Business meeting/work meeting off site/interview etc.	4	2	2
School/college	-	3	5
Appointment (other such as hair-dresser, barber, beautician etc.)	1	2	0
Other	5	3	9

Other forms of transport available: Slightly fewer had other forms of transport available (-5% pts), with a drop in percentage with a car available (-9% pts)

Base: All used taxi in past year - 642

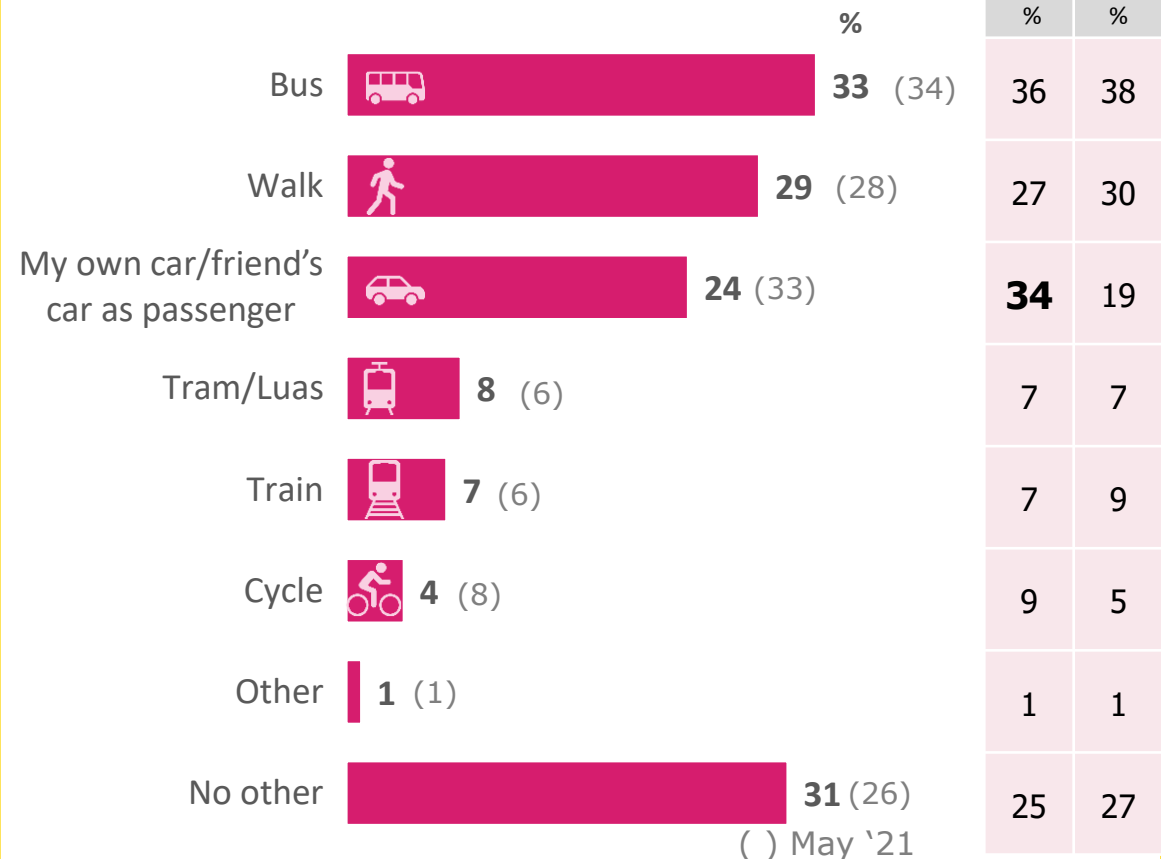
Availability levels of other transport



Region			
	Feb '21	May '21	Oct '21
	%	%	%
Dublin	71	76	74
Rest of Leinster	71	73	74
Munster	74	70	60
Conn/Ulster	61	77	69

Other forms of transport available

Base: **All** used taxi in past year - 642

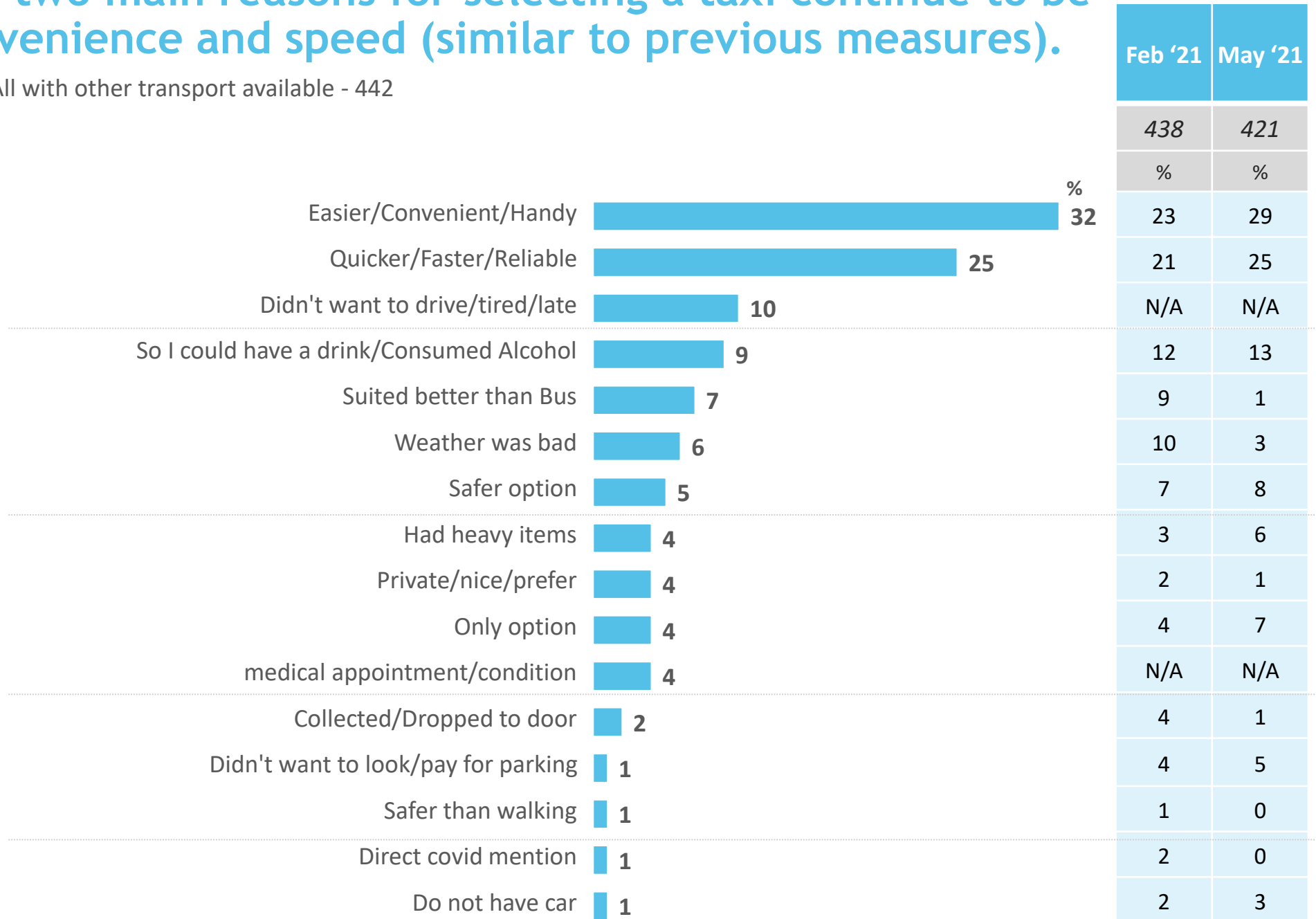


() May '21

Reason for using a taxi over alternative options:

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

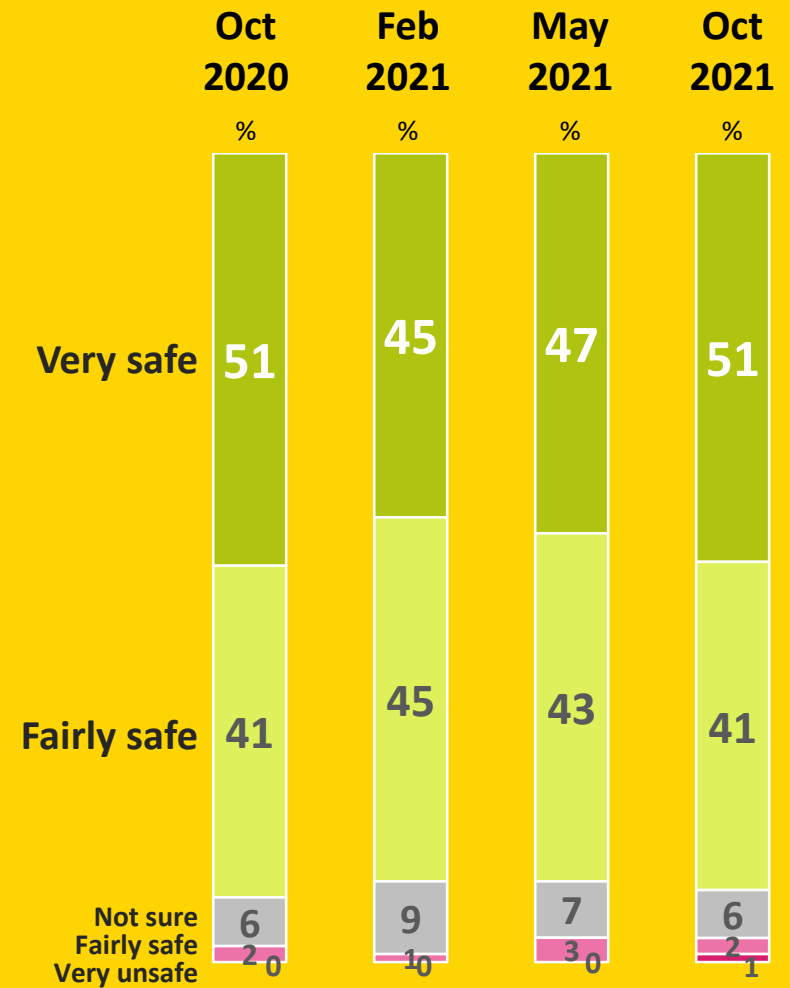
Base: All with other transport available - 442





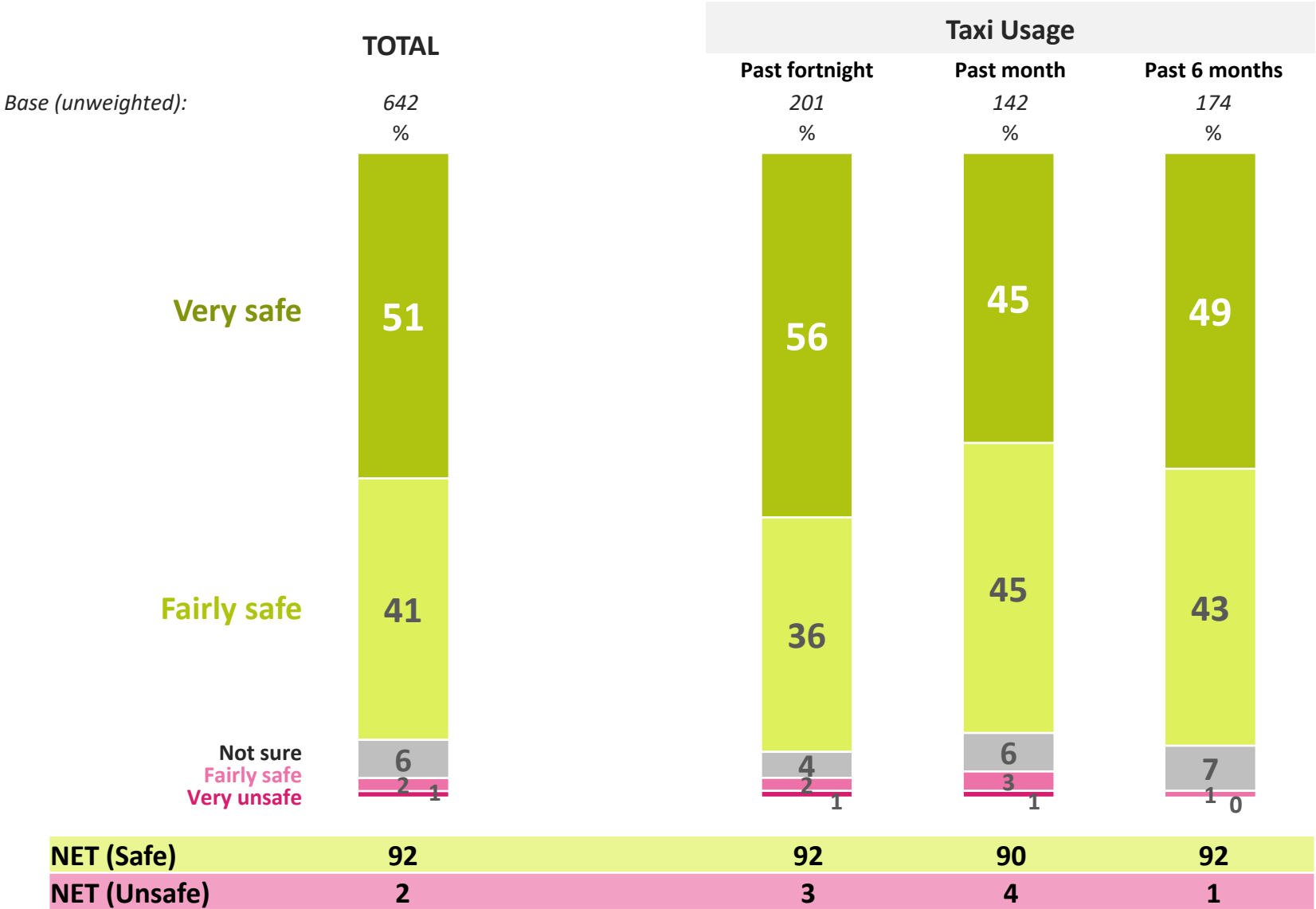
3. Covid safety measures

In the context of Covid, 92% of taxi users felt safe on their last journey.



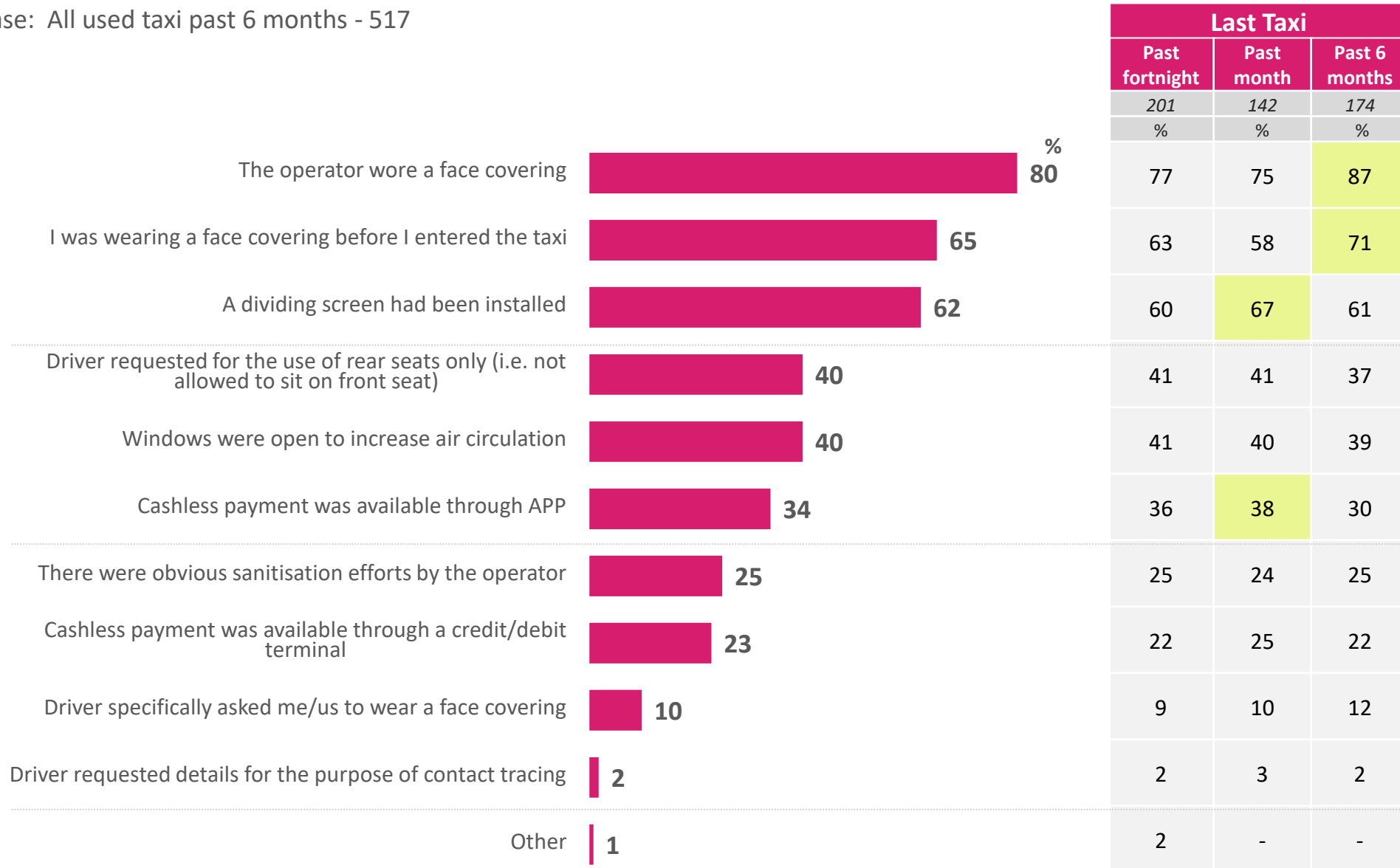
Recent taxi users more inclined to have felt very safe compared with those whose last taxi taken was at least a month ago.

Base: All used taxi in past year - 642



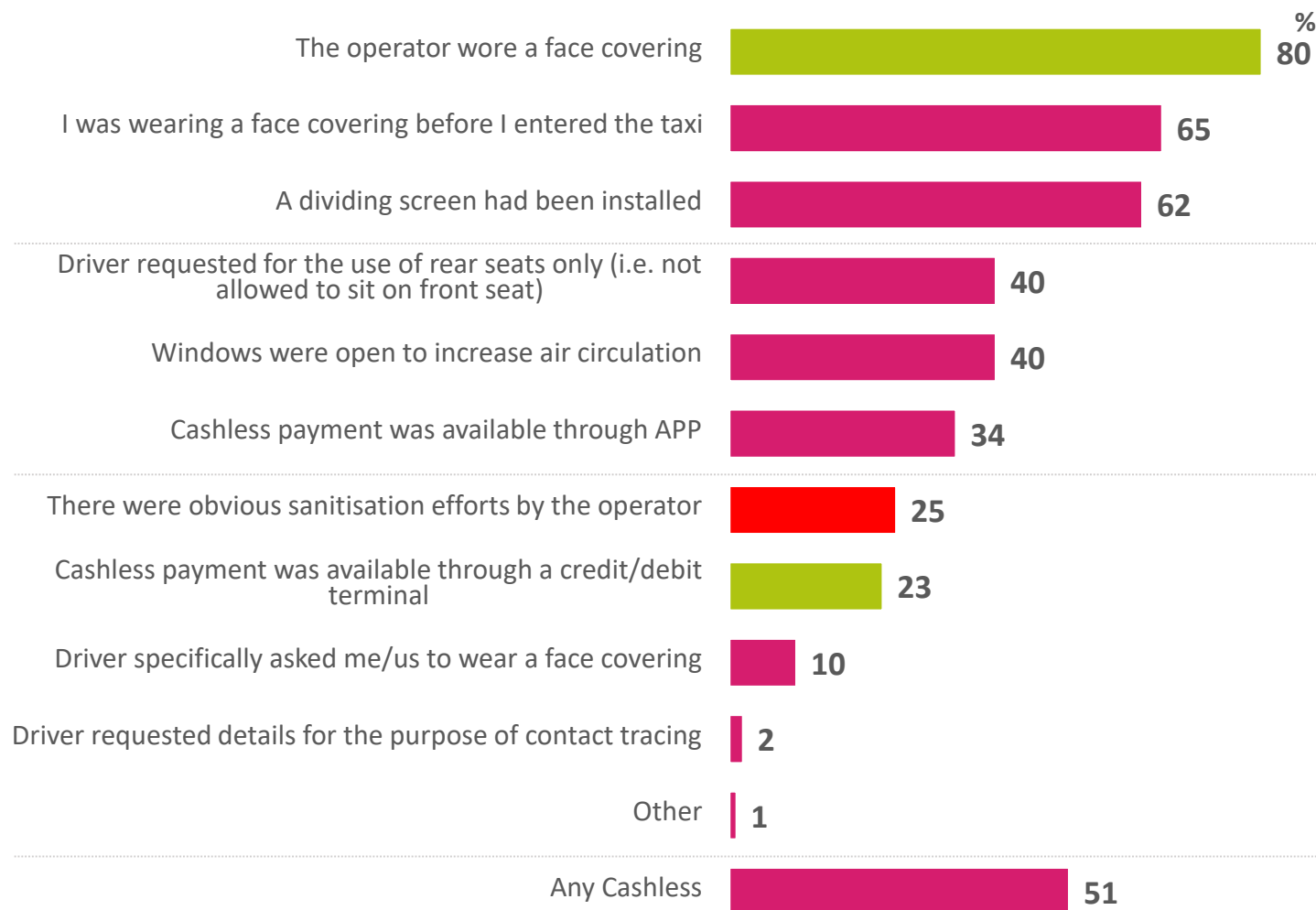
Covid related measures: Interestingly, those who last took a taxi in the past fortnight or past month are less inclined to indicate their driver wore a face covering than those who last took one in the past 6 months

Base: All used taxi past 6 months - 517



Covid related measures: Two areas increased - face coverings and cashless payment available. One decline (more significantly) for obvious signs of sanitation.

Base: All used taxi past 6 months - 517



May '21	REGION			
	Dublin	Rest of Leinster	Munster	Conn/ Ulster
389	166	111	152	88
%	%	%	%	%
76	78	85	79	78
64	63	60	68	69
59	69	55	58	66
41	37	46	39	40
39	41	41	40	37
37	46	30	24	31
34	17	24	32	33
19	23	22	25	20
10	7	15	13	9
1	2	5	-	4
1	1	-	-	2
49	61	46	44	46

**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

Covid related measures: **More than 4 in 5 of those who felt safe in their last taxi journey indicated that the operator wore a face covering**

Base: All felt safe and used taxi during Covid



Aspects that would make passengers feel safer - reasonably similar recommendations over time.

Base: All feeling fairly safe/unsure/unsafe - 320

IF..

			MOST RECENT TAXI USAGE			Feb 21	May 21
			Past fortnight	Past month	Past 6 months	Fairly safe - Unsafe	Fairly safe - Unsafe
		%	92	79	86	320	315
		%	%	%	%	%	%
A dividing screen had been installed		39	42	36	31	44	32
The operator wore a face covering		34	32	27	35	45	30
There were obvious sanitisation efforts by the operator		32	37	28	35	40	32
Windows were open to increase air circulation		30	32	28	29	38	34
Cashless payment was available through an app		27	29	31	19	28	24
Cashless payment through a debit/credit terminal		23	22	30	16	23	25
Driver requested for the use of rear seats only (ie not allowed to sit on front seat)		20	25	22	18	28	20
Driver specifically asked me/us to wear a face covering		15	7	5	3	25	15
Other		7	1	4	-	8	8
Driver requested details for the purpose of contact tracing		6	15	12	11	4	4
Driver requested a maximum number of people per row /social distancing across all seats available		2	6	6	7	2	1
Any cashless		39	41	45	30	41	39

Some difference in perception by demographics.

Higher than average
Lower than average

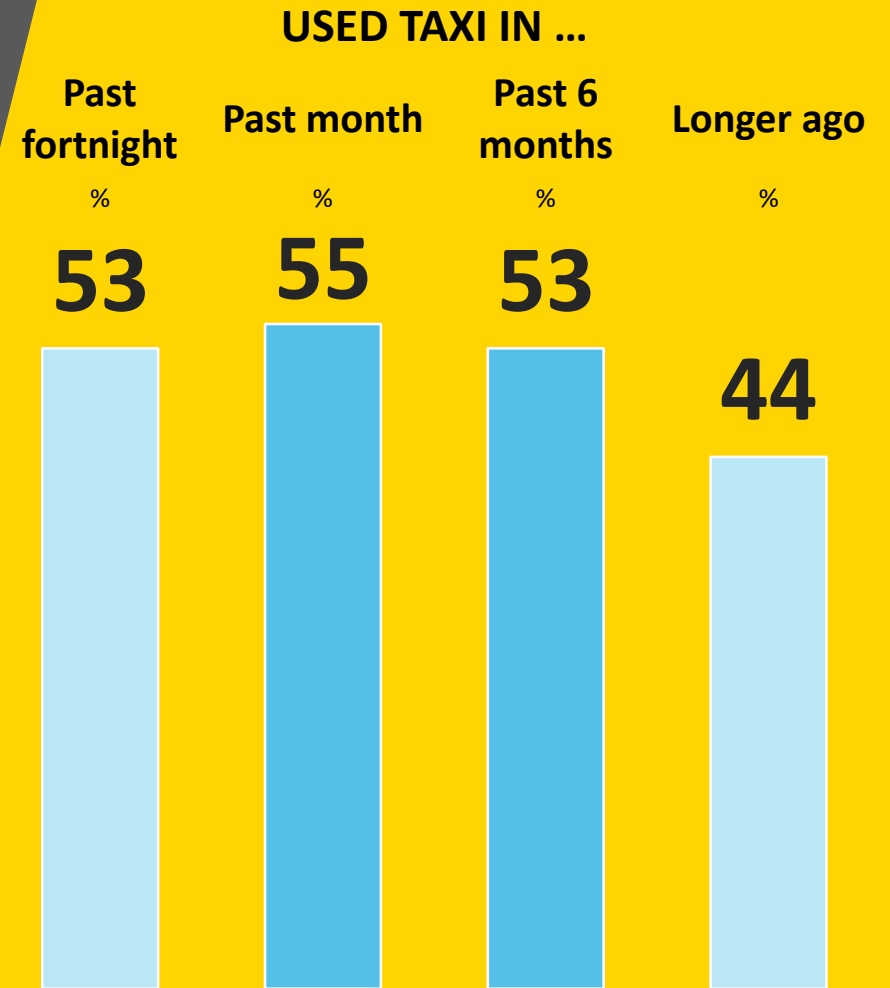
Base: All feeling fairly safe/unsure/unsafe - 320

	Total	Gender		Age					Region			
		Male	Female	18-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Conn/ Uls
<i>Base (unweighted):</i>	320	166	154	41	81	93	68	37	90	75	99	56
	%	%	%	%	%	%	%	%	%	%	%	%
A dividing screen had been installed	39	39	39	35	40	37	39	48	38	39	42	36
The operator wore a face covering	34	38	29	38	24	28	43	42	29	32	40	31
There were obvious sanitisation efforts by the operator	32	31	34	26	28	36	39	32	31	36	30	33
Windows were open to increase air circulation	30	26	34	22	37	31	33	23	38	30	20	33
Cashless payment was available through an app	27	29	24	31	36	27	17	17	33	23	20	32
Cashless payment through a debit/credit terminal	23	18	27	7	30	21	26	33	26	19	16	32
Driver requested for the use of rear seats only (ie not allowed to sit on front seat)	20	25	15	22	20	19	23	15	18	16	20	31
Driver specifically asked me/us to wear a face covering	15	13	18	9	20	13	12	23	11	20	12	21
Driver requested details for the purpose of contact tracing	6	6	5	1	7	6	8	6	6	9	2	7
Driver requested a maximum number of people per row /social distancing across all seats available	2	3	1	6	-	3	-	-	1	4	2	-
Other	7	5	9	2	5	8	10	11	5	8	7	6
Any cashless app or terminal	39	41	37	36	51	40	29	37	49	33	28	49



4. Payment methods used and preferences

53%
of recent passengers
paid using contactless
for the last taxi they
used



...but it has not changed much
over time.

Recent payment methods: Slight shift back towards cash in terms of most recent payment method.

Base: All used taxi in past fortnight - 201

	Taxis usage Past Fortnight		
	Feb '21	May '21	Oct '21
<i>Base (unweighted):</i>	79	146	201
	%	%	%
Any contactless:	57	57	53
The app that I used to order the taxi	29	30	35
Tapped a card (no contact)	17	18	14
Tapped mobile to pay through Googlepay, Applepay etc	1	4	2
Company Account	10	5	2
Any contact:	43	43	47
By cash	43	41	45
Used chip and pin to pay by card	-	1	1
Other	-	1	1

Recent payment method: Younger adults continue to be more likely to prefer contactless payments

Base: All used taxi in past year - 642

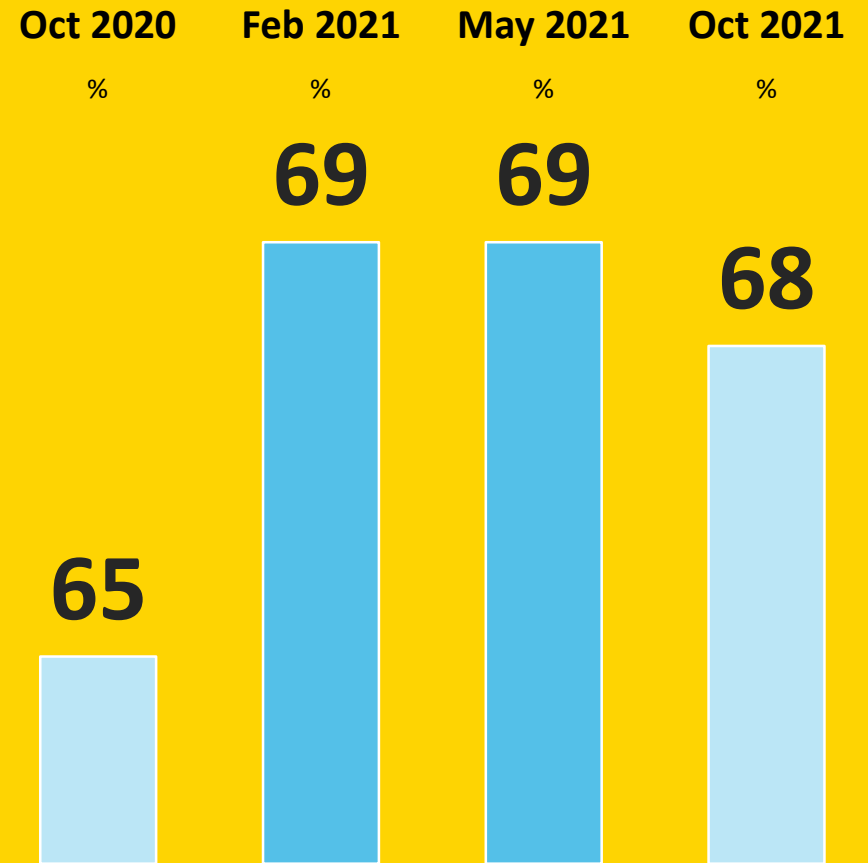
	Total	Gender		Age				
		Male	Female	18-24	25-34	35-49	50-64	65+
<i>Base (unweighted):</i>	642	326	316	89	139	191	137	86
	%	%	%	%	%	%	%	%
Any contactless:	52	53	49	65	62	53	38	34
The app that I used to order the taxi	30	32	27	43	44	29	14	15
Tapped a card (no contact)	19	18	20	15	16	21	23	17
Tapped mobile to pay through Googlepay, Applepay etc	2	2	1	4	2	1	1	2
Company Account	1	1	1	3	-	2	-	-
Any contact:	49	47	51	36	38	47	62	66
By cash	47	45	49	35	36	46	59	64
Used chip and pin to pay by card	1	1	2	1	2	1	1	1
Other	1	1	0	-	-	0	2	1

Recent payment methods: Two thirds in Dublin last paid via contactless method, whereas cash remains more prominent outside Dublin

Base: All used taxi in past year - 642

	Total	Region				Acquired Taxi by			
		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
<i>Base (unweighted):</i>	642	195	152	183	112	84	125	220	201
	%	%	%	%	%	%	%	%	%
Any contactless:	52	66	44	47	42	42	40	29	85
The app that I used to order the taxi	30	46	19	24	20	15	8	5	75
Tapped a card (no contact)	19	15	23	20	21	24	28	21	9
Tapped mobile to pay through Googlepay, Applepay etc	2	2	1	3	1	2	2	2	1
Company Account	1	3	1	-	-	1	2	1	-
Any contact:	49	35	57	54	59	57	60	70	16
By cash	47	34	54	52	57	54	58	68	15
Used chip and pin to pay by card	1	0	3	1	1	2	2	1	0
Other	1	1	-	1	1	1	-	1	1

Pre-Covid
68%
used cash to pay
for their taxi





Now only a
quarter prefer
to pay by
Cash during
the pandemic

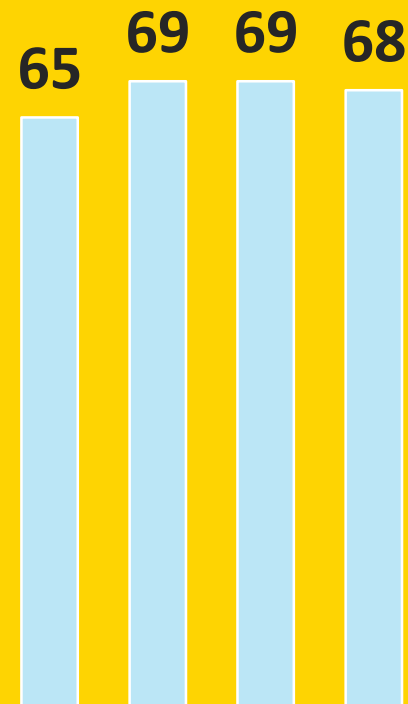


Payment preferences

Pre Covid restrictions

Used to pay
EXCLUSIVELY CASH

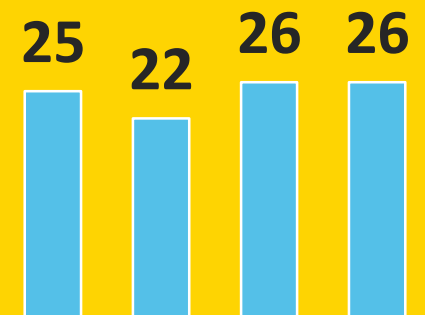
Oct 2020	Feb 2021	May 2021	Oct 2021
%	%	%	%



Prefer during the pandemic

EXCLUSIVELY
CASH

Oct 2020	Feb 2021	May 2021	Oct 2021
%	%	%	%



Payment preferences: Payment preferences strongly dominated by contactless for younger adults. More evenly divided for those over 65

Base: All used taxi in past year - 642

	Total	Gender		Age				
		Male	Female	18-24	25-34	35-49	50-64	65+
<i>Base (unweighted):</i>	642	326	316	89	139	191	137	86
	%	%	%	%	%	%	%	%
Any contactless:	65	64	65	72	78	64	57	48
The app that I used to order the taxi	33	34	32	49	47	31	18	16
Tapped a card (no contact)	28	28	28	19	25	29	37	29
Tapped mobile to pay through Googlepay, Applepay etc	3	1	4	2	5	2	2	2
Company Account	1	1	1	2	1	2	-	1
Any contact:	36	37	35	28	23	37	43	52
By cash	33	33	34	27	22	33	40	48
Used chip and pin to pay by card	2	2	1	1	1	2	3	2
Other	1	2	-	-	-	2	1	2

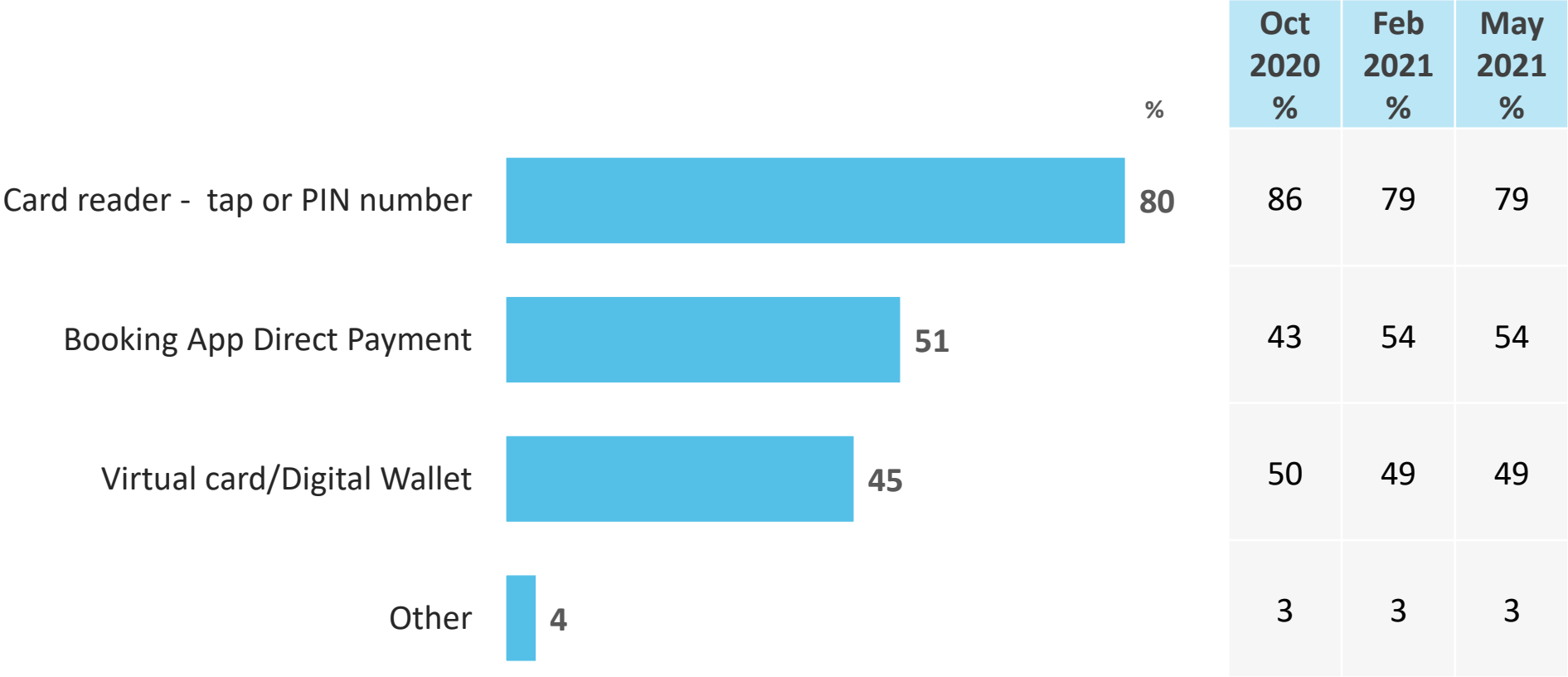
Importantly however, even those who are accessing a taxi on the street have a preference for contactless, with preference for contactless growing among this cohort

Base: All used taxi in past year - 642

	Total		Acquired Taxi by							
			Hailed it		Picked up at a rank		Ordered it by phone (spoke to someone)		Ordered it using an app	
	May '21	Oct '21	May	Oct	May	Oct	May	Oct	May	Oct
<i>Base (unweighted):</i>	567	642	61	84	95	125	213	220	181	201
	%	%	%	%	%	%	%	%	%	%
Any contactless:	52	65	53	64 ↑	40	54 ↑	33	45 ↑	79	91
The app that I used to order the taxi	26	33	14	24	9	10	8	10	64	74
Tapped a card (no contact)	18	28	25	35	24	37	19	32	9	15
Tapped mobile to pay through Googlepay, Applepay etc	4	3	8	4	4	5	3	2	3	2
Company Account	4	1	6	1	3	2	3	1	3	-
Any contact:	48	36	47	37	61	46	67	55	21	10
By cash	46	33	47	34	60	42	63	53	18	8
Used chip and pin to pay by card	2	2	-	1	1	3	3	2	2	1
Other	1	1	-	2	-	1	1	0	1	1

Payment methods that **should** be available in addition to cash: **4 in 5 (80%) feel that a card reader should be available: relatively stable across 2021**

Base: All adults 1038



Payment methods that should be available in addition to cash:

The youngest age group are the most inclined to suggest that payment by a virtual card/wallet should be available (57%)

Base: All adults 1038

	Total	Age					Region			
		18-24	25-34	35-49	50-64	65+	Dublin	RoL	Mun-ster	Conn/Uls
Base (unweighted):	1038	102	193	308	266	169	266	280	296	196
	%	%	%	%	%	%	%	%	%	%
Payment by card through the use of a terminal available in taxi	80	72	78	77	83	86	78	78	82	81
Payment through a payment app	51	53	52	53	54	41	56	50	49	46
Payment by a virtual card/wallet through phone app (Googlepay, Applepay)	45	57	50	50	43	29	49	44	47	39



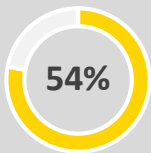
5. Key findings

Key Findings

Taxi usage



- Only 6% of adults use taxi services WEEKLY, which is similar to train (6%) and Luas/Dart (7%). Bus is higher @ 19% with an increase noted since May (15%), but still lower than October reported usage norms (18%).



of taxi users are using services less frequently than pre-Covid. However, this is down from 78% in February and 64% in May which is an encouraging trend.

- Furthermore, over the next month, the public are projecting an increase in usage of all forms of public transport, including taxis. (27% likely to use a taxi over the next month, in comparison with 20% in May 2021.)

Key usage changes



- There has been a definite shift AWAY from ordering taxis by phone (was 44% in May and is now 24%), but an evident increase in bookings made through an app (from 28% to 38% this wave)
- Journeys now seems slightly longer compared with May estimates (fewer under 5 mins and more between 5-12 mins)
- Day of week usage shows higher weekend usage, on Saturday in particular, and also more usage between the hours of 22.00 and midnight compared with May.
- The reason for taxi usage is now shifting back towards entertainment (more like Pre-covid times). However, work usage is considerably more important now than pre-covid and is the second most common recent usage.

Covid Safety Measures



- Importantly, 92% of taxi users during Covid **felt safe** from Covid, which is up 2 points since May.
- Taxi customers have witnessed a lot of safety measures in place including driver wearing a face covering (80%), a dividing screen between the driver and passenger (62%) and using a cashless system to pay (51%).
- Cashless options and screen dividers more evident in Dublin 61% and 69% respectively.

Payment options



- 53% of those using taxi services in past fortnight used contactless for payment which is lower than reported in May (was 57%).
- Contactless remains higher in Dublin and among those booking through an App.
- Cash has the edge outside Dublin and particularly for telephone ordering (68%) and rank usage (58%).
- The preference for contactless remains highest in younger users, in Dublin and in those ordering through an app.



of taxi users believe a card reader should be available in addition to cash.

Looking ahead



- There is evidence of a further modest increase in the number of taxi users overall (77% vs. 71% in May).
- However, there is a more substantial shift in passenger journey estimates versus pre Covid (journey estimates were at -73% in Feb; -45 in May and now stands at -37%).
- Based on the data to hand, the project taxi user base in 2 to 3 month is estimated at +30% of current levels. As such, **recovery for taxi demand seems imminent.**

Building trust



- For those who are not feeling as safe with taxi usage, the priorities in order are :
 - Using cashless payment methods (39% vs. 39% in May 2021)
 - Driver wears a face covering (34% vs 30%)
 - Obvious signs of sanitation of the vehicle (32% vs 32%)
 - Windows open to increase air circulation (if possible) (30% vs 34%)

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.