

AMERICANS' VIEWS AND USE OF MOBILITY ON DEMAND

ITS America's Mobility on Demand (MOD) Alliance and AAA produced a national survey on consumers' perception and use of on-demand mobility services, such as Lyft, Uber, Gig Car Share, Zipcar, electric scooters, bike-sharing, car-sharing, and micro transit. The survey sought to assess who uses these mobility offerings, how they see Mobility on Demand (MOD) benefiting or creating challenges in their communities, and future interest in on-demand services, should they be added in their communities. The survey also assessed the impact of COVID-19 on the use of MOD services. Recognizing the impact of community type (i.e., urban, suburban, rural) on the availability of MOD services, the study was designed to understand perceptions and usage in these different areas.

Key findings include:

- Most respondents (62%) have never used or are infrequent users of MOD. The remaining 38% of respondents use on-demand mobility options from time to time or more frequently.
- Younger adults from 18 – 54 are most likely to use MOD services (44%) than older adults. While 27% of all 55+ adults use MOD services, the rate jumps sharply in urban areas (36%) compared to suburban (25%) and rural (16%) areas.
- In the past six months, MOD users have primarily used ride-hailing (such as Lyft and Uber, 48%), with scooter and bike modalities used by only 5%.
- Most MOD users (80%) are satisfied with their current MOD transportation options regardless of urbanicity or race/ethnicity. Users who are 55 and older tend to be somewhat more satisfied than younger users (86% vs. 78%, respectively) – though satisfaction rates were generally high across generations.
- Users generally think their community is better off (66%) with MOD services regardless of urbanicity. They cite fewer DUI episodes, easier trip planning, and faster trip times as some of the most common benefits. Increased expense, congestion, and pollution are the most commonly cited drawbacks.
- For MOD users, rented bikes/scooters typically replace walking, whereas ride-hailing (such as Lyft and Uber) typically replace rides from friends, public transit, and the traveler's own car.
- Only 13% of respondents would be likely to give up their personal car/s in favor of on-demand options within the next two years. Respondents who are younger, non-white, or lower-income are more likely to give up their vehicles compared to their counterparts.
- When asked for their concerns about MOD, 72% of Americans cite safety, including use of bikes/scooters in traffic, poorly vetted hired drivers and/or liability for damage to shared vehicles.
- Following patterns of current use, we expect ride-hailing to be the most widely used modality in the future. Scooters and bicycles will remain as a niche modality but should experience the strongest rate of growth going forward. Our results suggest the introduction of an app that consolidates the full range of MOD modalities will do well.