

## 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, Zipcar, electric scooters, bike-sharing, car-sharing, and microtransit. 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. 27% of 55+ year-old adults use MOD services compared to 44% of 18-54 year-old adults.
- Most MOD users (80%) are satisfied with their current 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, use of rented bikes/scooters typically replace walkable trips, whereas use of car-share services (such as GIG Car Share and Zipcar) typically replace rides from friends, use of public transit, and trips made in the traveler's 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 about MOD broadly, 72% of Americans cite safety concerns, including:
  - Half (50%) of Americans cite safety concerns using micromobility options alongside vehicle traffic;
  - Trust of hired drivers who may not be properly vetted is a concern for 48% of Americans; and
  - Approximately four in 10 (39%) Americans raise questions about the liability of shared vehicles in traffic crashes.