New Mobility

2019 Nationally Representative
Multi-Mode Survey

Prepared by
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CR Consumer Reports®

INTRODUCTION

The focus of this report is consumer usage of and opinions on new transportation modes. In September-October 2019, Consumer Reports conducted a *nationally representative survey of 2,007 U.S. adults* about their current habits, needs, and preferences for getting around on a daily basis for their commute, running errands, and when on vacation. This report focuses on the results of the survey related to consumer preferences and attitudes towards 'new mobility' modes, such as ridehailing and electric scooters. Based on results, it is clear that consumers feel more can be done to protect their safety when using new modes of transportation.

REPORT HIGHLIGHTS

➢ The most common modes of transportation Americans say they have used at all in the past two years include walking (87%), their own car or truck (86%), traditional rental cars (57%), carpooling (52%), and ridehailing services like Uber or Lyft (48%).

48%
HAVE USED A
RIDEHAILING SERVICE

When respondents were asked which modes of transportation they use and how often, 48% say they have used ridehailing services (like Uber & Lyft) at least once, 5% say they use ridehailing at least once per week, and 1% say they use it daily. 23% say they use ridehailing regularly when on vacation.
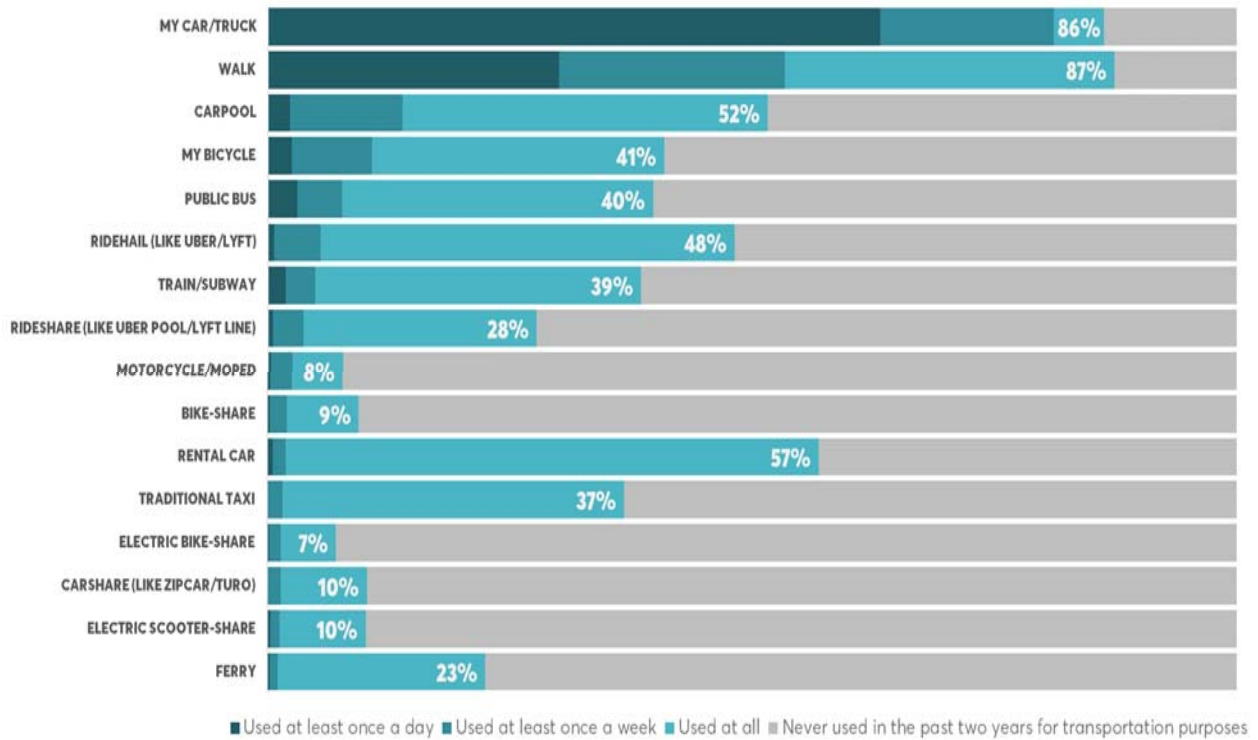
➢ A majority of Americans are in favor of laws in cities about the use of electric scooters. More than eight out of 10 Americans (81%) think there should be laws on where electric scooters can be used, such as on the sidewalk or in a bike lane. Nearly three-quarters (73%) think there should be laws regarding helmet usage.

➢ There is overwhelming support (90%) for mandatory background checks of drivers for ridehailing services. And, over eight out of 10 Americans (82%) think there should be mandatory car inspections.

FINDINGS

When it comes to modes of—and services for—transportation, such as driving your own car, taking a ridehail like Lyft or Uber, riding a bike or electric scooter, or taking public transit, consumers have many different choices.

MODES OF TRANSPORTATION USED MOST REGULARLY

The graph below shows the percentage of Americans who have used some common modes of transportation in the past two years.
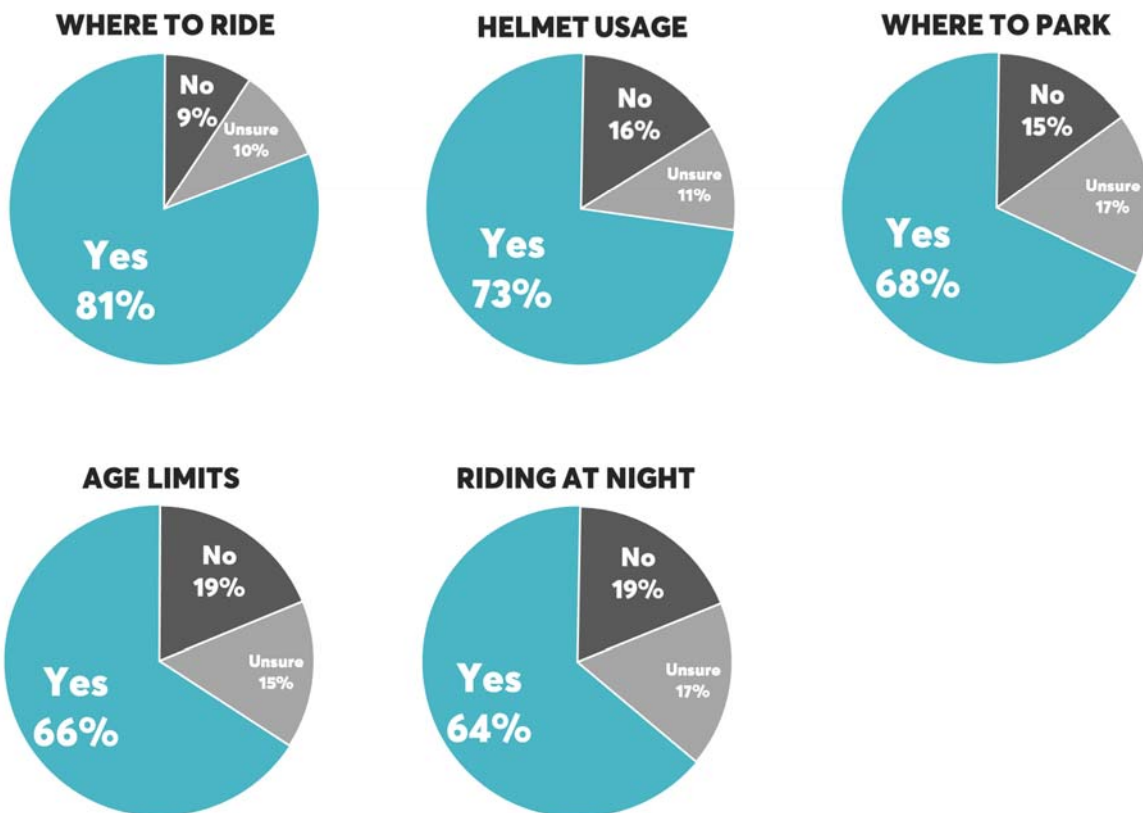
Policies and Regulations

We asked about laws and regulations regarding the use of electric scooters and ridehailing services.

As seen in the graphs below, *a majority of Americans are in favor of laws in cities about the use of electric scooters*. More than eight out of 10 Americans think there should be laws on where electric scooters can be used, such as on the sidewalk or in a bike lane. Nearly three-quarters think there should be laws regarding helmet usage.

Among individuals who say they have used an electric scooter in the past two years, fewer are supportive of these types of regulations, especially among frequent riders. For example, only 46% of people who have used an electric scooter say they think there should be laws regarding helmet usage. Younger individuals are also generally less likely to be in favor of electric scooter regulations compared to older individuals.

DO YOU BELIEVE THAT CITIES SHOULD HAVE LAWS REGARDING THE USE OF ELECTRIC SCOOTERS, SUCH AS:

WHERE TO RIDE
- Yes 81%
- No 9%
- Unsure 10%

HELMET USAGE
- Yes 73%
- No 16%
- Unsure 11%

WHERE TO PARK
- Yes 68%
- No 15%
- Unsure 17%

AGE LIMITS
- Yes 66%
- No 19%
- Unsure 15%

RIDING AT NIGHT
- Yes 64%
- No 19%
- Unsure 17%

Below, graphs show the percentage of Americans who think there should be laws for ridehailing services. *There is overwhelming support for mandatory background checks of drivers.* And, over eight out of 10 Americans think there should be mandatory car inspections. More Americans are unsure about whether or not there should be laws regarding where ridehailing pick-ups and drop-offs can take place.

DO YOU BELIEVE THERE SHOULD BE LAWS FOR RIDEHAILING SERVICES LIKE UBER OR LYFT, SUCH AS:
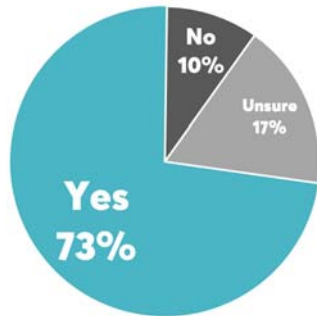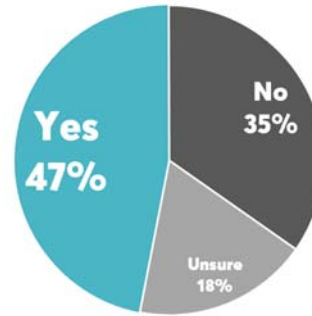
MANDATORY BACKGROUND CHECKS OF DRIVERS

Unsure 4%
No 6%
Yes 90%

MANDATORY CAR INSPECTIONS

No 10%
Unsure 8%
Yes 82%
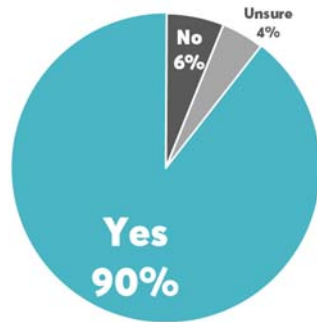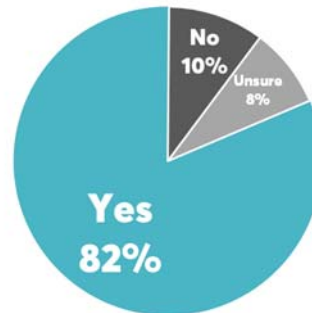
ACTIONS FOR VEHICLE RECALLS

No 10%
Unsure 17%
Yes 73%

PICK-UP/DROP-OFF LOCATIONS

No 35%
Unsure 18%
Yes 47%
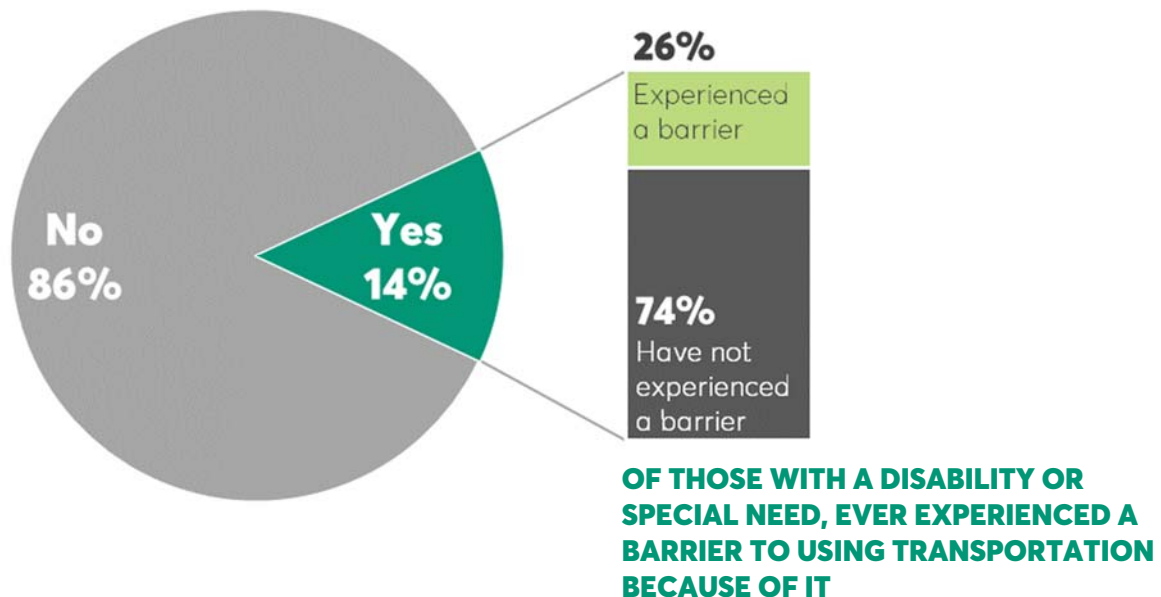
Disabilities and Special Needs

Fourteen percent of Americans say they have a disability or special need that may require accommodation when traveling. Among this group, a quarter say they have experienced a barrier to using a form of transportation they would have liked to use because of their disability, such as inadequate elevator access or a ridehail driver refusing to pick them up.

DO YOU OR A MEMBER OF YOUR HOUSEHOLD HAVE A DISABILITY OR SPECIAL NEED THAT MAY REQUIRE ACCOMMODATION WHEN TRAVELING?

No 86%

Yes 14%

26% Experienced a barrier

74% Have not experienced a barrier

OF THOSE WITH A DISABILITY OR SPECIAL NEED, EVER EXPERIENCED A BARRIER TO USING TRANSPORTATION BECAUSE OF IT

We asked those with a disability or special need who told us they had experienced a barrier to using a form of transportation to tell us about their experiences. Here are some quotes:

- *When traveling some subways didn't have elevators*

- *I sometimes need to bring with me an emotional support animal and not everyone wants dogs in their car*

- *Vehicle was unable to accommodate a wheelchair. Driver not qualified to handle handicapped person.*

- *My niece requires a special kind of car seat that is molded to fit her body, weight, width, and height. She is 15 and can not walk. Most vehicles do not have the proper hook ups that are needed for her car seat.*

- *Due to a mobility issue, we have had to refuse/be refused an Uber ride because my husband was too tall and his crutch and his leg braces would not fit in the smaller cars that were available. I find it ridiculous that we be charged more for a larger car because of disability.*

- *Rented a vehicle and it wouldn't accommodate our wheelchair. When we returned the vehicle, the clerk said it would have only cost 5 dollars more to have a better car that would accommodate my wheelchair.*

- *Spinal injuries make it painful to ride with drivers not accustomed to transporting someone in chronic pain*

- *Too wide a gap to board trains and lack of space on buses*

- *Not having adequate Handicapped Parking Spaces*

Respondent Stories

We were interested in what people say is their "go-to" choice for getting around. In addition to walking (14%), transit options listed below are the most commonly-used methods to commute to work.* We then asked what they like most about this transportation option, what they like least about it, and what they think could make things better for them when trying to get around, in their own words. Below are examples of individual answers, which are not nationally representative:

CAR - 70% use their own car/truck to commute; 12% carpool to commute

Pros	Cons	Needed Improvements
Readily available	Traffic	Better roads
I can come and go as I please	Gas prices	Safer drivers
Don't have to rely on anyone else	Price of insurance	More fuel efficient vehicles
It holds my stuff	Maintenance	Better public transportation options
Private	Environmental impact	More parking

BUS - 8% use a public bus to commute

Pros	Cons	Needed Improvements
App tells me when bus is coming	Connections to another bus	Buses stick to schedule better
Low cost	Doesn't always show up	More routes to places I need to go
Don't need driver's license	Wait times	Less crowded
Can get work done	Don't run very frequently	Better signage
Easy to use	Buses stop running too early	More frequent buses

TRAIN/SUBWAY - 5% use a train/subway to commute

Pros	Cons	Needed Improvements
Less stressful to not be driving	Crowded	Train line extend to reach more areas
Don't have to worry about traffic	Delays	More frequent service
Doesn't require parking	Lack of cleanliness	Modernize/improve subway lines
Fast	Not always reliable	Cheaper fares
Cost-efficient	Dependent on train schedules	Less pollution

RIDEHAILING - 5% use ridehailing to commute; 3% use pooled rideshares to commute

Pros	Cons	Needed Improvements
Simple and convenient	Wait times	Cheaper costs
It shows up wherever I am	Cost	Energy efficient cars
They are in more places than taxis	Bad drivers	More privacy
Drivers are professional	Bad for the environment	Easier app
Very fast	Cars are too small	Drivers keep their vehicle cleaner

BICYCLE - 6% use their own bike to commute; 1% use bicycle-sharing to commute

Pros	Cons	Needed Improvements
I get exercise	Weather	More regulations to car traffic
On my own time	Safety from traffic	More bike lanes
Inexpensive	Can only go limited distance	Less traffic
Good for the environment	Can't carry much with you	Cheaper public transit
Avoid traffic	It's tiring	Bike only routes/paths

*Percentages are among commuters and represent those who say they regularly use this mode on their commute. Respondents could choose multiple types.

SUMMARY

Almost half of Americans have used a ridehailing service (such as Uber and Lyft) at least once in the past two years, with about 5% of commuters using these services regularly on their commute. Nearly all Americans feel more could be done to ensure the safety of customers. There is overwhelming support (90%) for mandatory background checks of drivers for ridehailing services. There is also concern about the quality and safety of the vehicles themselves. Over eight out of 10 Americans (82%) think there should be mandatory car inspections, which could check for open recalls related to the vehicle, and other threats to passenger safety.

In addition, many Americans are in favor of laws that regulate the use of electric scooters. About eight in 10 Americans think there should be laws about where electric scooters can be driven, such as on the sidewalk or in a bike lane. And nearly three-quarters think there should be laws regarding helmet usage.

METHODOLOGY

This multi-mode survey was fielded by NORC at the University of Chicago using a nationally representative sample. The survey was conducted from September 27 – October 14, 2019.

A general population sample of U.S. adults age 18 and over was selected from NORC's AmeriSpeak Panel for this study, using sampling strata based on age, race/ethnicity, education, and gender. In total, NORC collected 2,007 interviews, 1,849 (92%) by web mode and 158 (8%) by phone mode. The margin of error for the sample of 2,007 is +/- 3.03% at the 95% confidence level. Smaller subgroups will have larger error margins.

To encourage study cooperation, NORC sent email and SMS reminders to sampled web-mode panelists. To administer the phone-survey, NORC dialed the sampled phone-mode panelists throughout the field period. Panelists were offered the cash equivalent of $3. Where appropriate, response answer choices were randomized. Final data is weighted by age, gender, region, race/ethnicity, housing tenure, telephone status, and education to be proportionally representative of the U.S. adult population.

Key demographic characteristics (after weighting is applied) are presented below:

- 52% female
- Median age of 47
- 63% White, non-Hispanic
- 33% 4-year college graduates
- 55% have a household income of $50,000 or more