

Citywide Mobility Survey: Transportation Impacts of COVID-19

July 2020 Panel Results - Prepared for NYC DOT by RSG



SURVEY OBJECTIVES

1

Develop a longitudinal panel of participants from the 2019 Citywide Mobility Survey (CMS) to understand the impacts of COVID-19 on citywide travel behavior.

2

Compare panel participants' behavior in spring 2019 to their behavior after the COVID-19 outbreak from spring 2020 through fall 2020.

3

Measure attitudes toward current transportation issues and topics.

COVID-19 PANEL SURVEY DESIGN

Invitation criteria for the COVID-19 summer panel survey:

1. Completed the 2019 CMS conducted from May 2019 through June 2019.
2. Agreed to participate in future NYC DOT surveys.
3. Provided an email address.

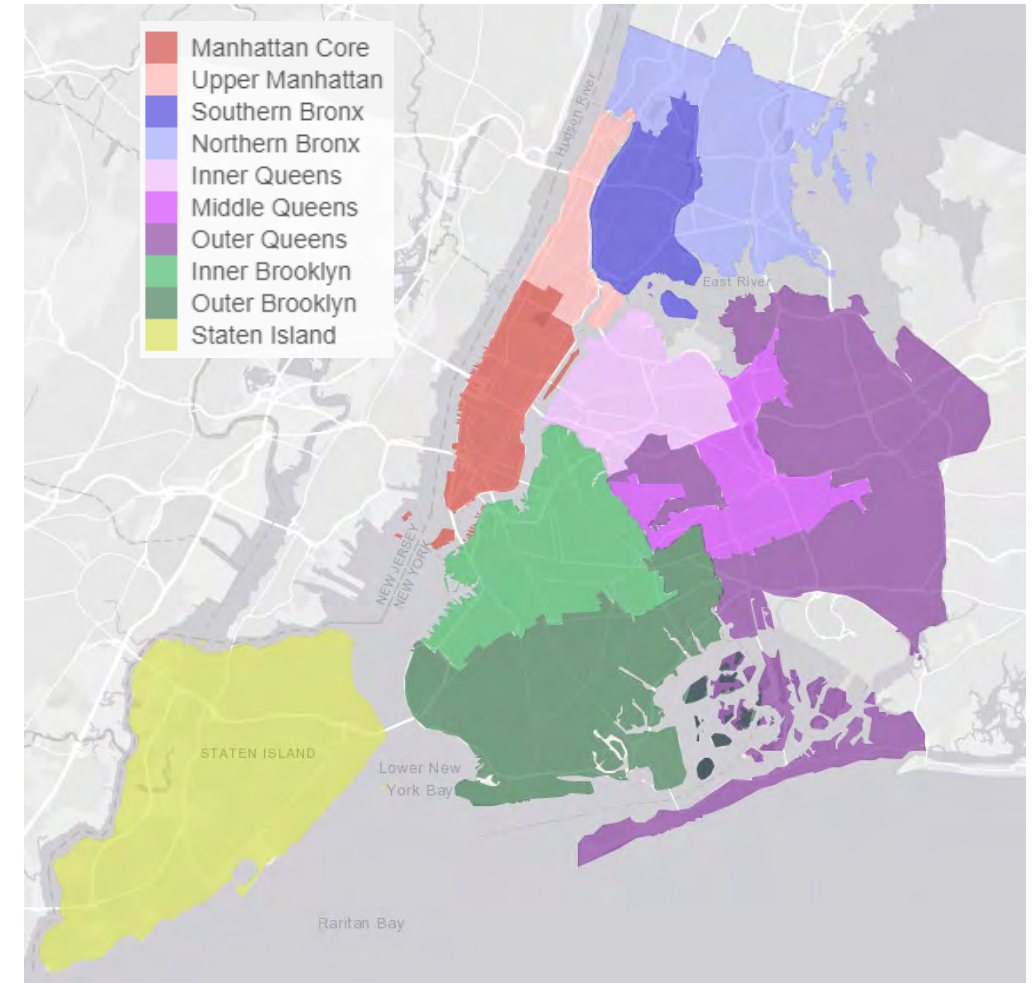
Summer panel fielding period began on July 16, 2020 and concluded on July 31, 2020.



SUMMER SURVEY RESPONSE

CMS ZONE	INVITED	COMPLETED	COMPLETE RATE ¹
Manhattan Core	178	100	56.2%
Upper Manhattan	191	91	47.6%
Inner Brooklyn	183	96	52.5%
Outer Brooklyn	170	86	50.6%
Inner Queens	160	75	46.9%
Middle Queens	177	95	53.7%
Outer Queens	188	102	54.3%
Southern Bronx	255	83	32.5%
Northern Bronx	239	106	44.4%
Staten Island	171	105	61.4%
Outside of New York City	--	20	--
Total	1,912	959	50.2%

¹Complete Rate = Completed / Invited



EXECUTIVE SUMMARY OVERVIEW

- 1 Sample Profile
- 2 Employment Information
- 3 Travel Behavior Over Last 7 Days
- 4 Travel Behavior Changes Since Phase 1 of Reopening
- 5 Attitudinal Questions
- 6 Vehicle Ownership

WEIGHTING KEY:

All figures are weighted to represent the population of New York City unless noted otherwise.



Sample Profile

SAMPLE PROFILE

Demographic Breakdown		Unweighted Sample	Weighted Sample	ACS 5-Year Average (2013-2017)
Age	18 – 24	6%	10%	12%
	25 – 44	46%	41%	40%
	45 – 64	35%	31%	31%
	65 and older	13%	18%	17%
Gender	Female	59%	53%	53%
	Male	41%	47%	47%
Race	American Indian or Alaska Native	1%	1%	0%
	Asian	18%	22%	14%
	Black or African American	17%	20%	24%
	Native Hawaiian or other Pacific Islander	1%	0%	0%
	White	53%	42%	43%
	Two Races or More	3%	4%	3%
	Other	8%	11%	15%
Ethnicity	Hispanic, Latino, or Spanish Origin	20%	26%	29%
	Not of Hispanic, Latino, or Spanish Origin	80%	74%	71%
Income	Under \$25,000	14%	16%	25%
	\$25,000-\$49,999	18%	18%	19%
	\$50,000-\$100,000	31%	28%	26%
	\$100,000-\$199,999	28%	26%	20%
	\$200,000 or more	9%	12%	9%
Borough	Manhattan	20%	24%	21%
	Brooklyn	19%	22%	30%
	Queens	29%	30%	28%
	Bronx	20%	18%	16%
	Staten Island	11%	7%	5%
Employment Status	Employed	61%	59%	64%
	Not employed	39%	41%	36%
Disability	Any disability	9%	16%	13%
	Ambulatory – Difficulty walking or climbing stairs	5%	8%	8%
	Vision disability – Blind or have difficulty seeing	1%	1%	3%
	Hearing disability – Deaf or have difficulty hearing	2%	4%	3%

Note: For variables where “Prefer not the answer” was an option, respondents who selected that answer have been excluded from these calculations.

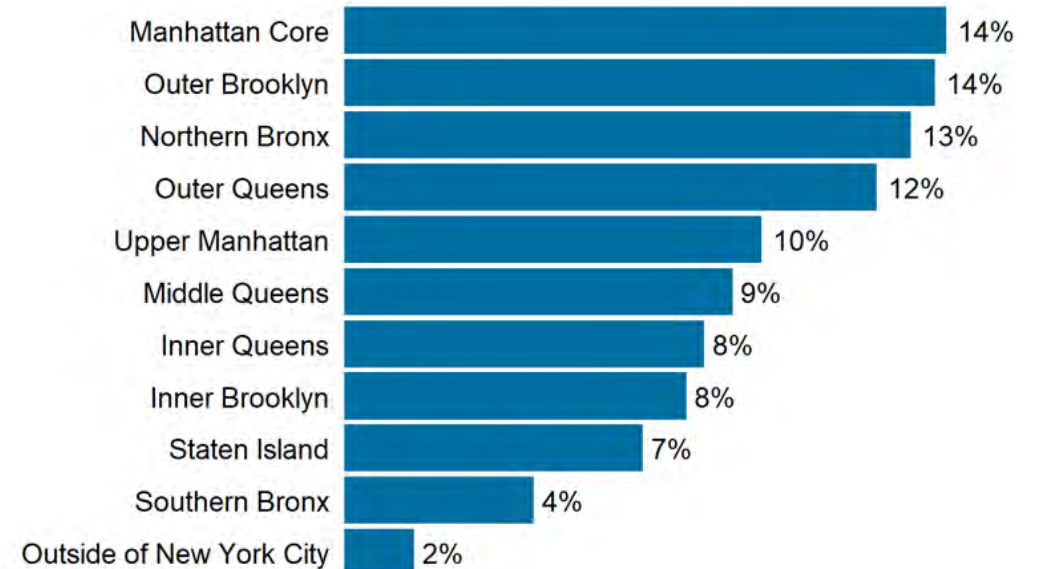
RESIDENCE

11% of New Yorkers plan to move outside of New York City in the next 12 months. An additional 14% do not know yet.

Of the 11% of New Yorkers who plan to move outside of New York City, 18% plan to move somewhere within the New York City metropolitan region.

CURRENT HOME CMS ZONE

UNWEIGHTED N = 959, WEIGHTED N = 6,669,853





**CITYWIDE
MOBILITY**
SURVEY

Employment Information

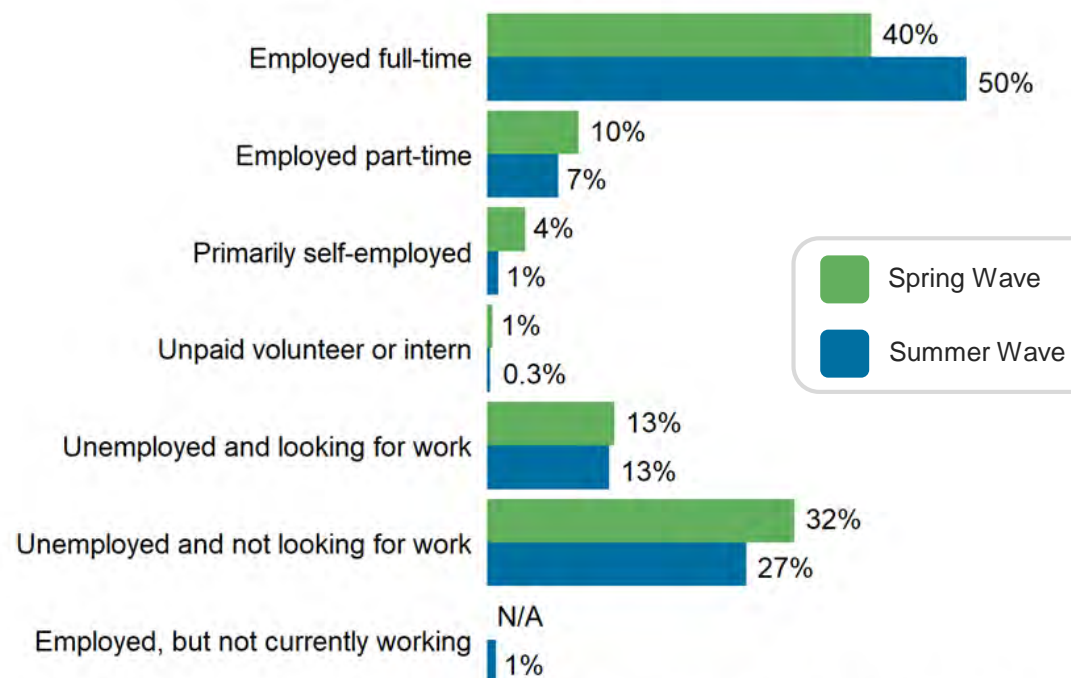
EMPLOYMENT STATUS

The full-time employment rate increased by 10 percentage points since the spring survey.

The part-time employment rate and self-employment rate both dropped by 3 percentage points since the spring survey.

EMPLOYMENT STATUS

SPRING WAVE N = 1,063, SUMMER WAVE N = 959



Note: Employed, but not currently working was a new answer option in the summer wave.

WORK LOCATION

20% of workers telework some days and travel to work other days, compared to 3% in the spring survey.

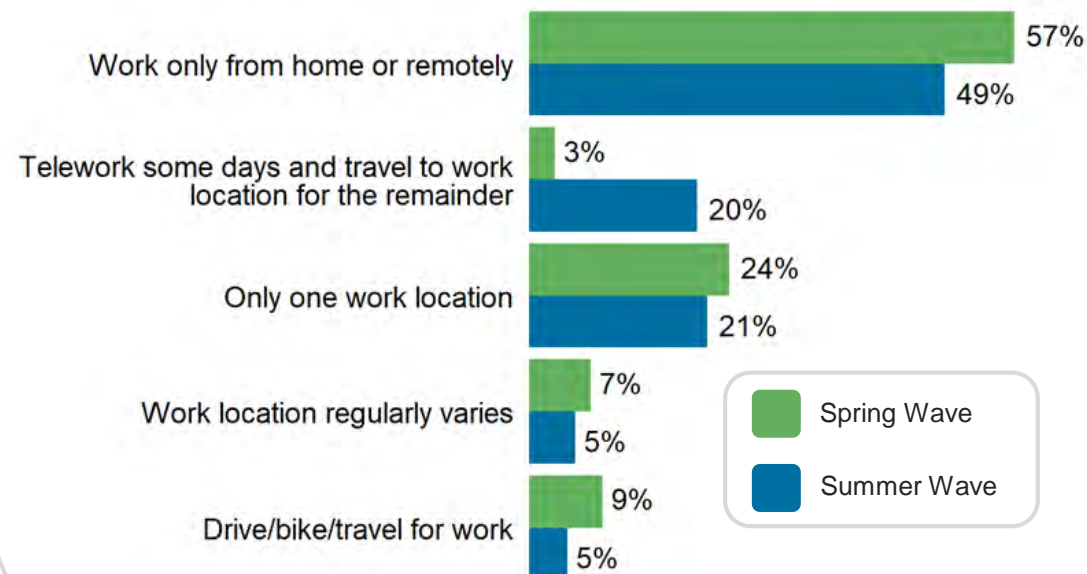
Black New Yorkers and male New Yorkers are significantly less likely to work only from home.*

New Yorkers with household incomes of \$100,000 or more are significantly more likely to work only from home.*

**Note: These statements are based on a logistic regression model.*

WORK LOCATION

SPRING WAVE N = 651, SUMMER WAVE N = 583



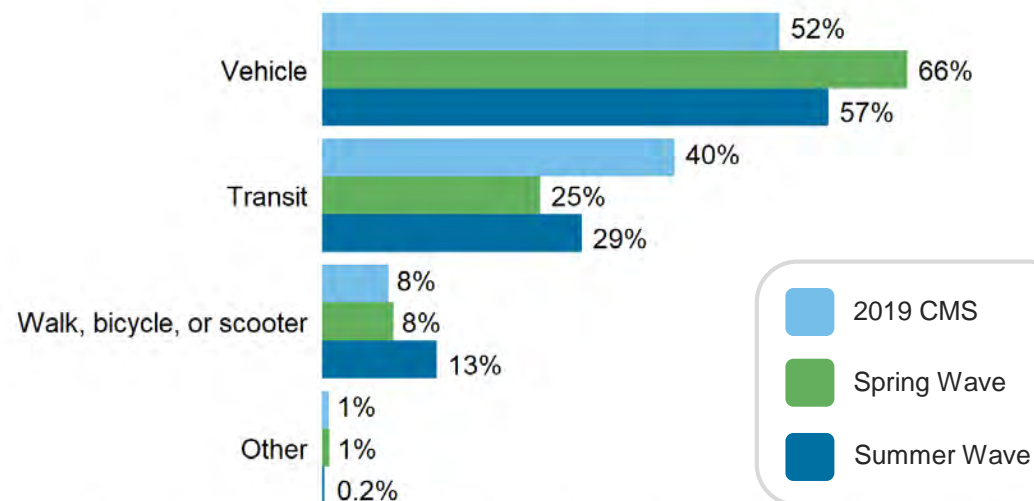
WORK MODE

The share of workers commuting by vehicle dropped by 9 percentage points since the spring survey.

The share of commuters taking transit and the share of commuters traveling by walk, bicycle, or scooter both increased since the spring survey.

WORK MODE

2019 CMS N = 206, SPRING WAVE N = 183, SUMMER WAVE N = 236



Note: Respondents who completed the spring and/or summer panel and reported a work mode in the 2019 CMS are included in the 2019 CMS distribution. One respondent who selected scooter has been removed from this figure due to a high weight.

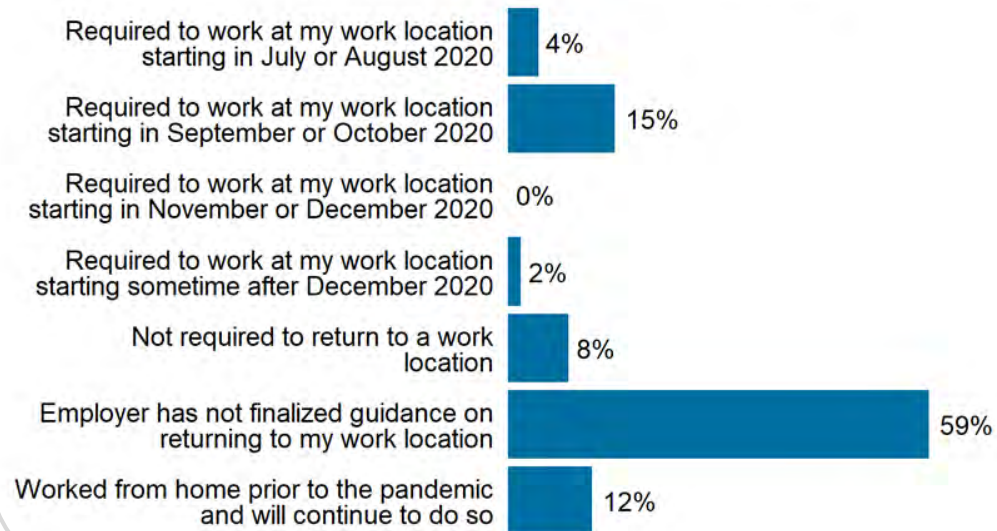
RETURN TO WORKPLACE

59% of employers have not yet finalized guidance on bringing employees back to the workplace.

74% of workers who started teleworking due to the COVID-19 pandemic identified at least one barrier to returning to work.

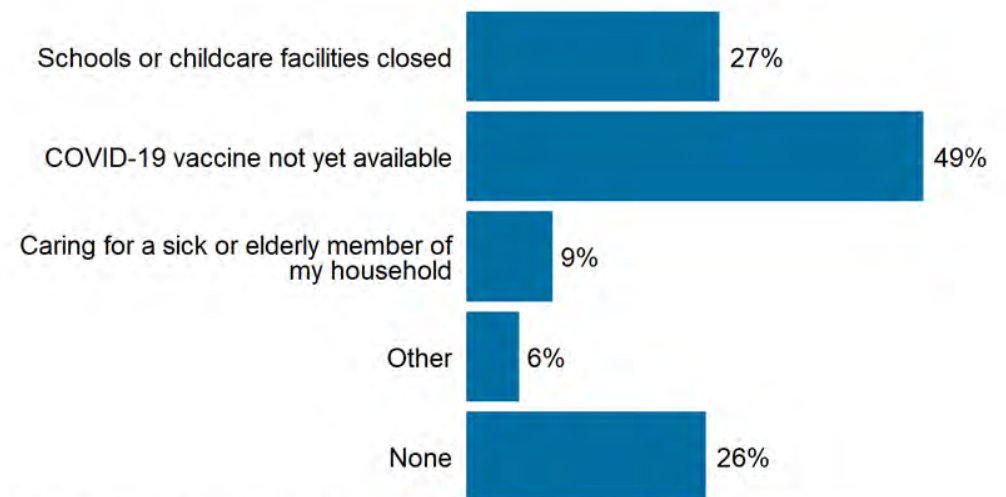
RETURN TO WORKPLACE

UNWEIGHTED N = 346, WEIGHTED N = 1,939,669



BARRIERS TO RETURNING TO WORK

UNWEIGHTED N = 307, WEIGHTED N = 1,711,607



Note: Respondents could select more than one answer to this question.

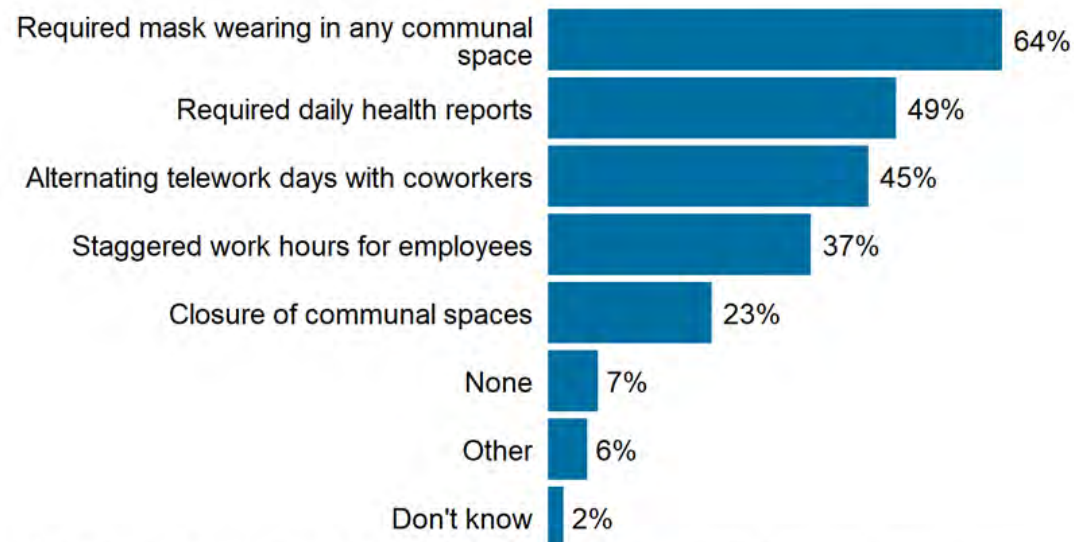
EMPLOYER SAFETY MEASURES

More than 90% workers who currently commute to a workplace report that their employer has put in place at least one safety measure as a result of the COVID-19 pandemic.

The most commonly reported safety measure is requiring mask wearing within communal spaces, followed by required daily health reports.

EMPLOYER SAFETY MEASURES

UNWEIGHTED N = 237, WEIGHTED N = 2,006,670



Note: Respondents could select more than one answer to this question.

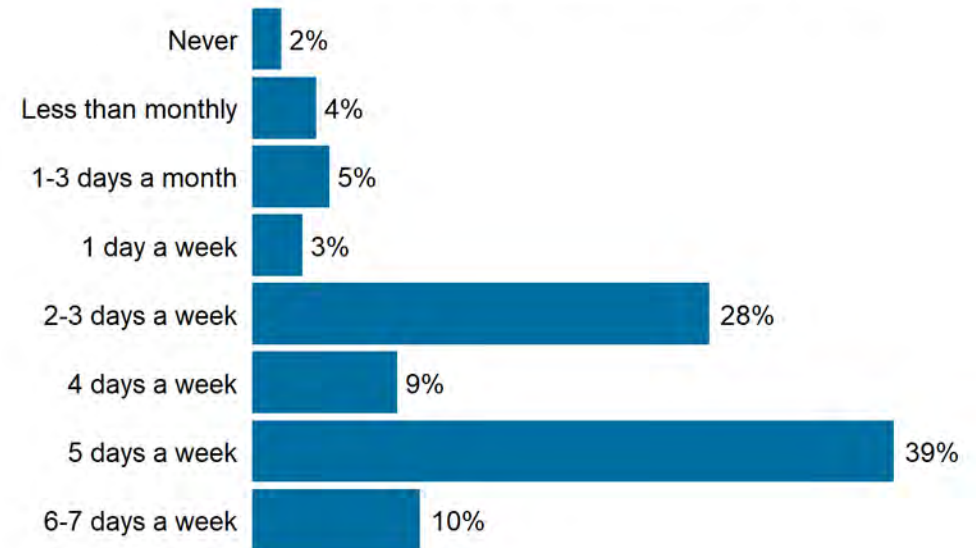
TELEWORK BEHAVIOR

58% of New Yorkers who started teleworking full-time due to the COVID-19 pandemic would prefer to continue to telework 4 days a week or more.

89% would prefer to continue to work from home at least 1 day a week as the city reopens.

PREFERRED TELEWORK FREQUENCY

UNWEIGHTED N = 384, WEIGHTED N = 2,494,740





**CITYWIDE
MOBILITY
SURVEY**

Travel Behavior Over the Last 7 Days

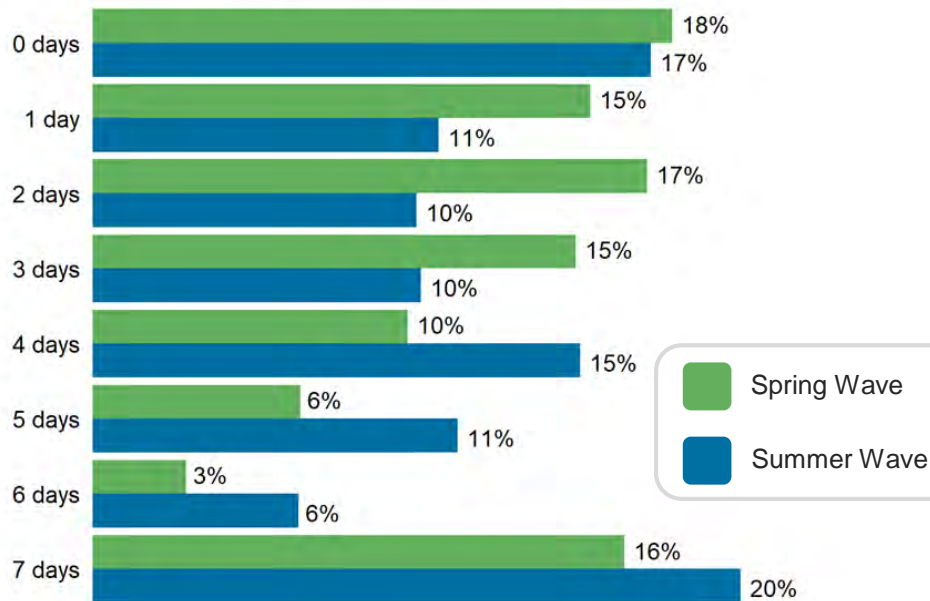
*The summer panel fielding period began on July 16, 2020 and concluded on July 31, 2020.
The “Last 7 Days” refers to July 10, 2020 through July 31, 2020.*

OUTDOOR EXERCISE

37% of New Yorkers exercised outside on 5 or more days in the last week, compared to 25% of New Yorkers in the spring survey.

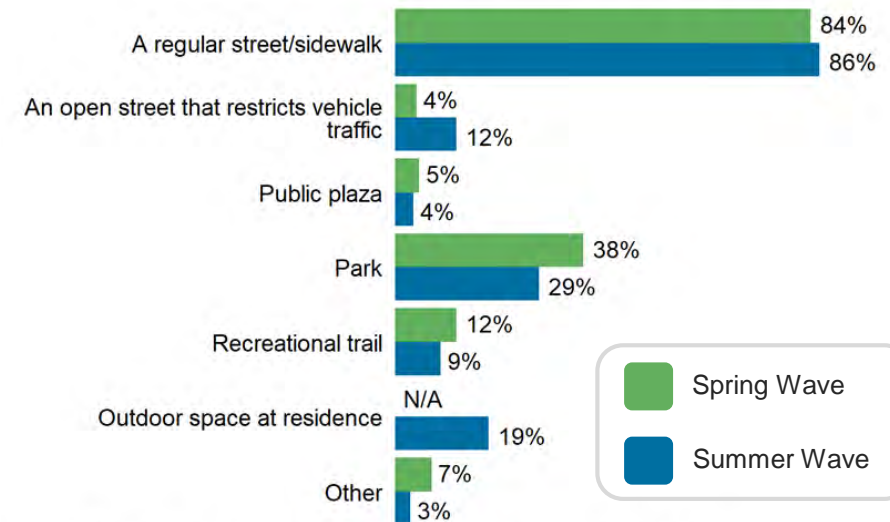
OUTDOOR EXERCISE FREQUENCY IN THE LAST 7 DAYS

SPRING WAVE N = 1,037, SUMMER WAVE N = 939



EXERCISE LOCATION IN THE LAST 7 DAYS

SPRING WAVE N = 830, SUMMER WAVE N = 779



Note: Respondents could select more than one answer to this question.
 Note: Outdoor space at residence was a new answer option in the summer wave.

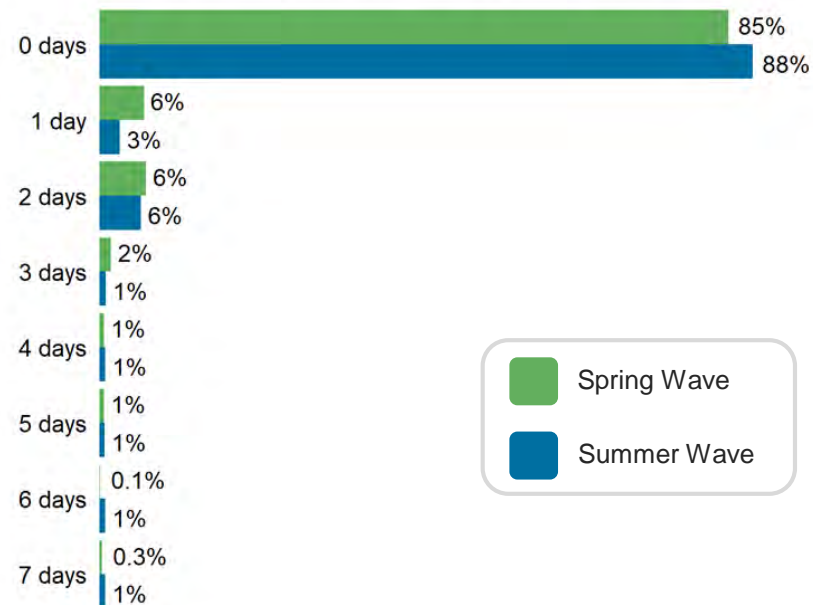
BICYCLE FREQUENCY

12% of New Yorkers rode a bike in the last 7 days.

In the 2019 CMS, 11% of New Yorkers had ridden a bike in the last 7 days.

BICYCLE USE FREQUENCY IN THE LAST 7 DAYS

SPRING WAVE N = 1,037, SUMMER WAVE N = 939



BICYCLE USE FREQUENCY IN THE LAST 7 DAYS FROM THE 2019 CMS

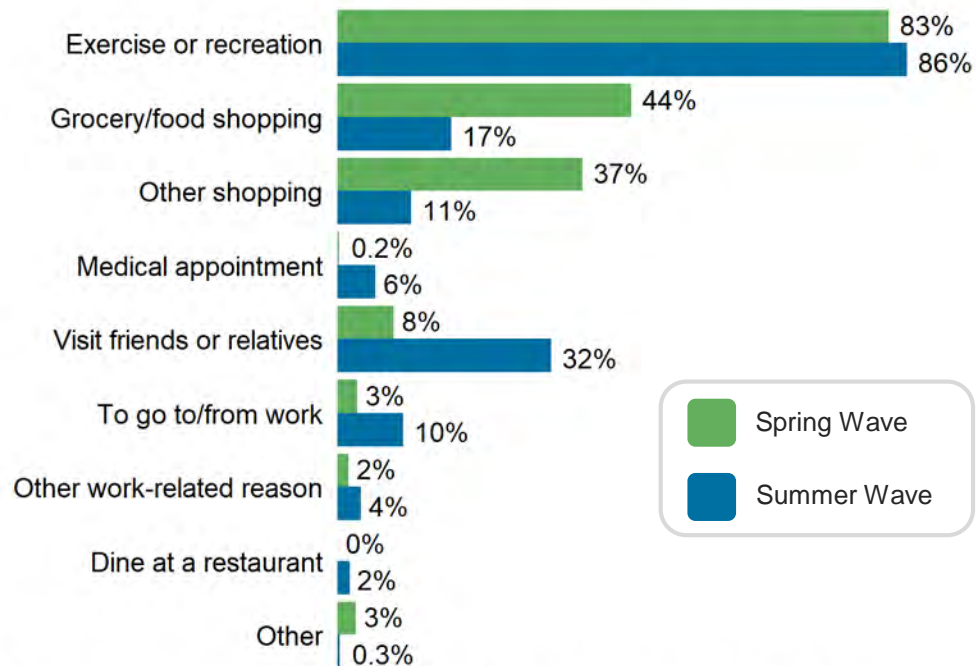
UNWEIGHTED N = 476, WEIGHTED N = 3,170,428



BICYCLE TRIP PURPOSES

BICYCLE TRIP PURPOSE IN THE LAST 7 DAYS

SPRING WAVE N = 132, SUMMER WAVE N = 145



Note: Respondents could select more than one answer to this question.

In the 2019 CMS:

- 89% of New Yorkers who used a bicycle in the city made exercise or recreation trips by bicycle.
- 44% of New Yorkers who used a bicycle in the city ran errands using a bicycle.

Based on 2019 CMS question: “Why do you ride your bicycle in New York City? Select all that apply.” which was asked of anyone who reported riding a bike in the city.

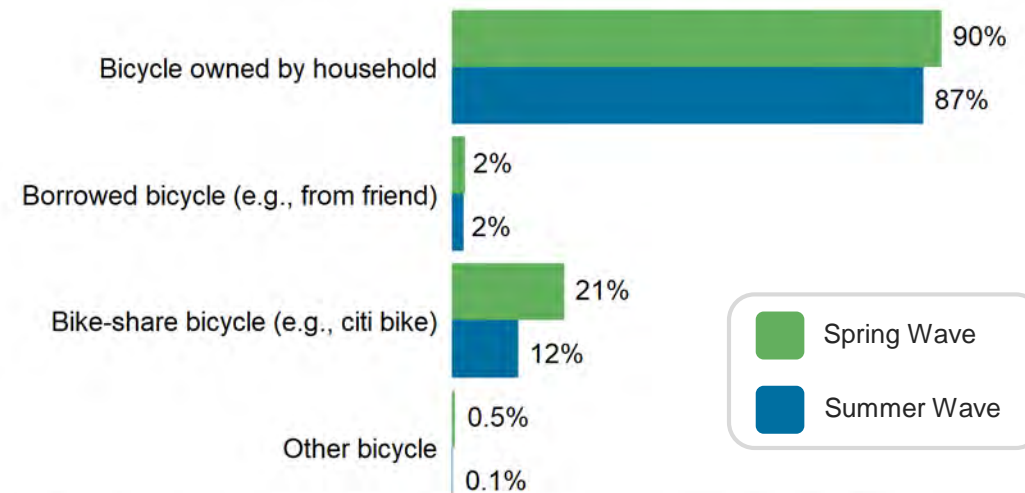
BICYCLE TYPE

87% of New Yorkers who rode a bicycle in the last 7 days rode their personal bicycle.

While the share of bicycle riders who used a bike-share bicycle dropped since the spring survey, this change is not statistically significant.

BICYCLE TYPE USED IN LAST 7 DAYS

SPRING WAVE N = 132, SUMMER WAVE N = 145

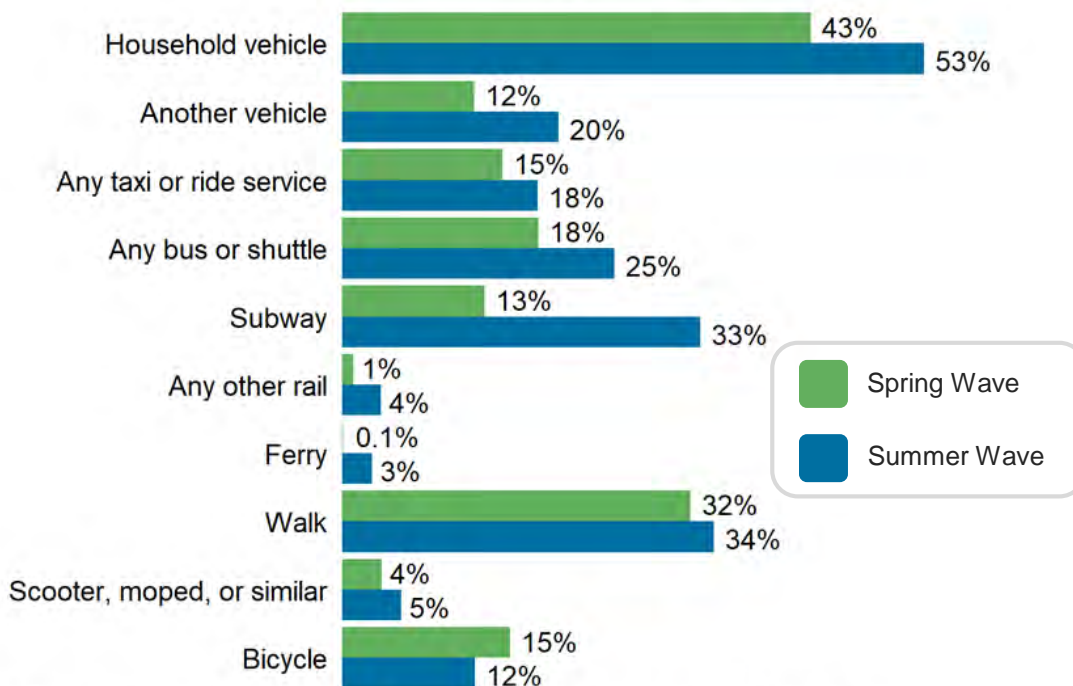


Note: Respondents could select more than one answer to this question.

MODES USED IN THE PAST WEEK

MODES USED IN THE LAST 7 DAYS

SPRING WAVE N = 1,037, SUMMER WAVE N = 939



Note: Respondents could select more than one answer to this question.

Among New Yorkers who used a household vehicle in the last 7 days, 23% made a vehicle trip on all 7 days.

(unweighted N = 436, weighted N = 3,181,742)

58% of New Yorkers who rode the bus in the last week, rode the bus on 1 or 2 of those 7 days.

(unweighted N = 181, weighted N = 1,343,138)

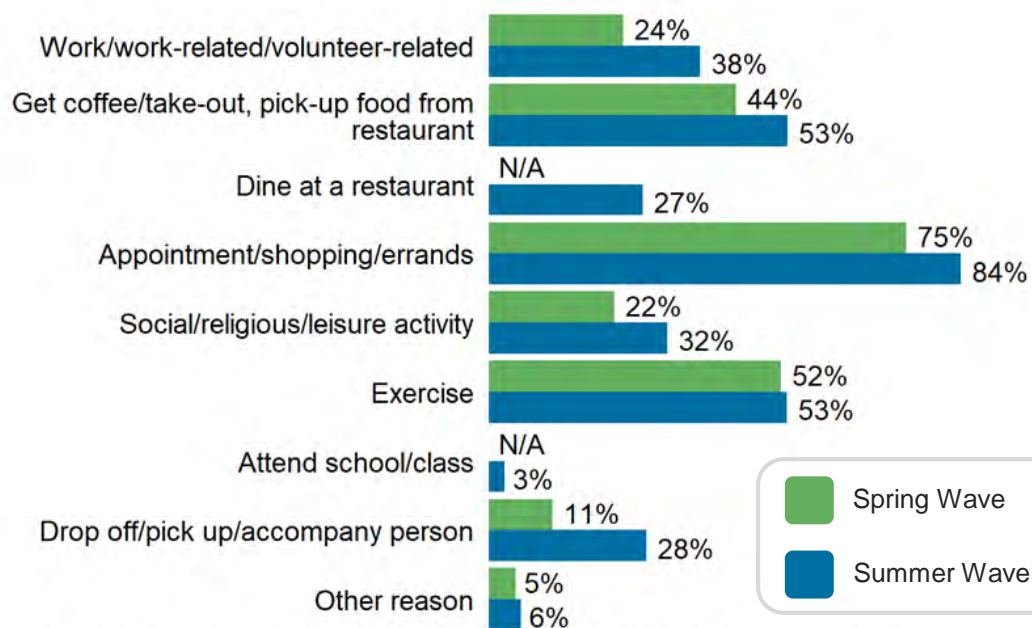
71% of New Yorkers who rode the subway in the last week, rode the subway on 1 or 2 of those 7 days.

(unweighted N = 187, weighted N = 1,712,153)

TRIP PURPOSE IN THE PAST WEEK

TRIP PURPOSES IN THE LAST 7 DAYS

SPRING WAVE N = 1,037, SUMMER WAVE N = 939



Note: Respondents could select more than one answer to this question.

Note: Dine at a restaurant and attend school/class were new answer options in the summer wave.

Of the 84% of New Yorkers who made a trip for an appointment, shopping, or errands, 27% made such a trip on 1 day, and 37% on 2 days in the last 7 days.

(unweighted N = 791, weighted N = 5,540,523)

33% of New Yorkers who made a work trip made work trips on 5 days in the last week.

(unweighted N = 302, weighted N = 2,482,522)

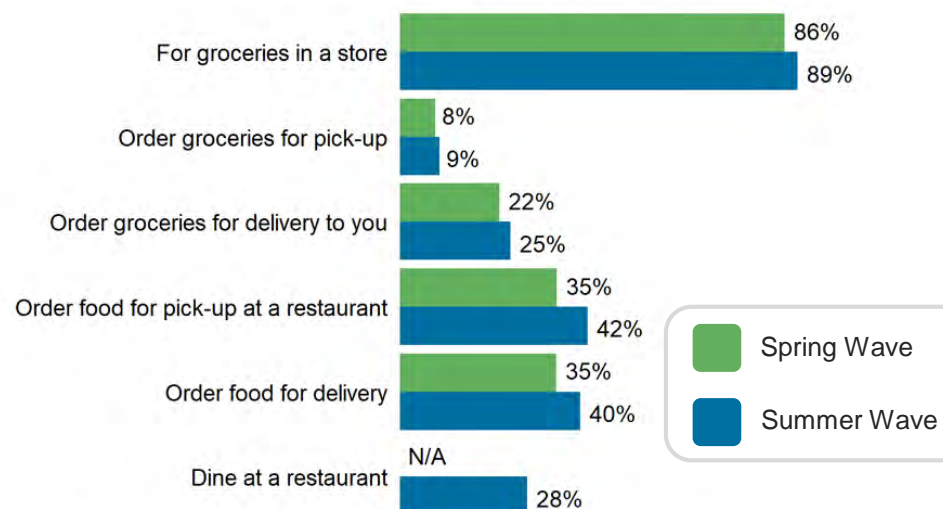
SHOPPING FOR FOOD OR GROCERIES IN THE PAST WEEK

28% of New Yorkers dined at a restaurant in the last week.

Grocery shopping frequency has remained consistent since the spring panel survey.

FOOD SHOPPING IN THE LAST 7 DAYS

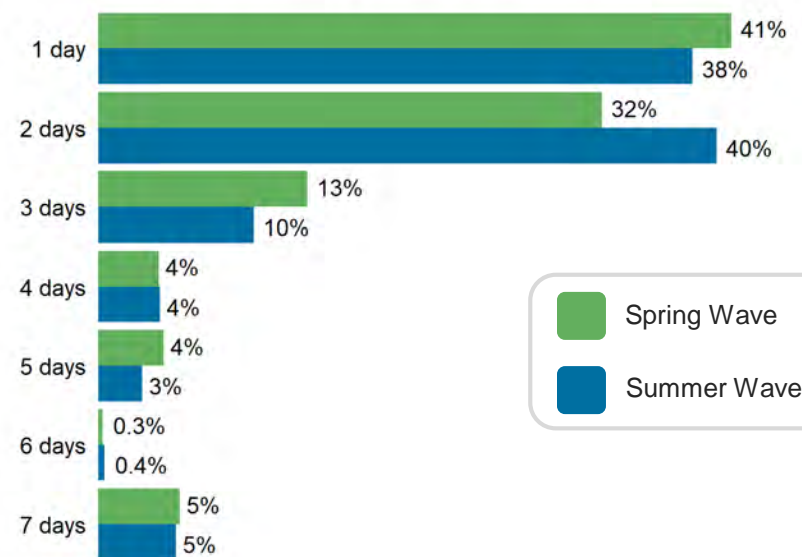
SPRING WAVE N = 1,037, SUMMER WAVE N = 939



Note: Respondents could select more than one answer to this question.
 Note: Dine at a restaurant was a new answer option in the summer wave.

IN-STORE GROCERY SHOPPING FREQUENCY IN THE LAST 7 DAYS

SPRING WAVE N = 839, SUMMER WAVE N = 807

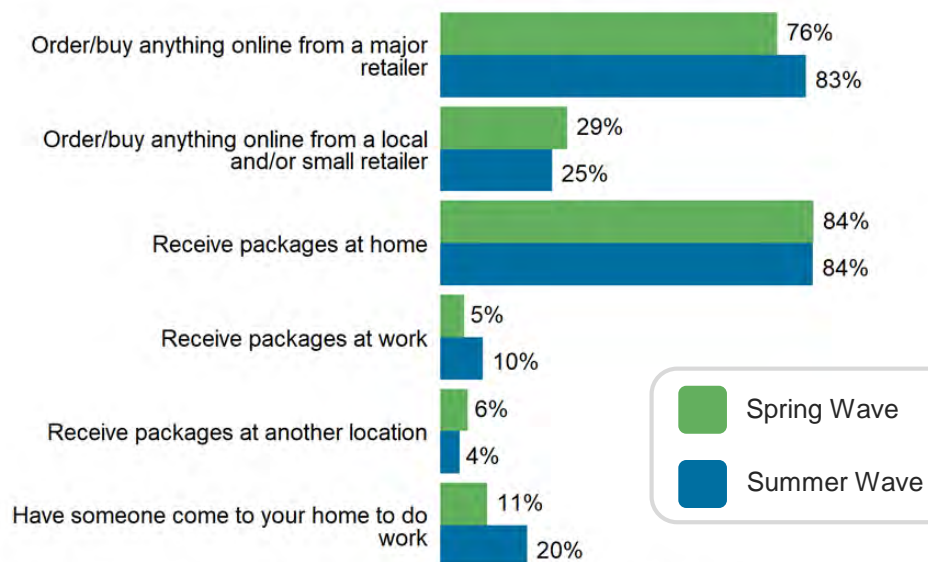


ONLINE PURCHASES AND DELIVERIES IN THE PAST WEEK

Of the 84% of New Yorkers who received a package at home in the last 7 days, 65% received packages on one or two days.

DELIVERIES IN THE LAST 7 DAYS

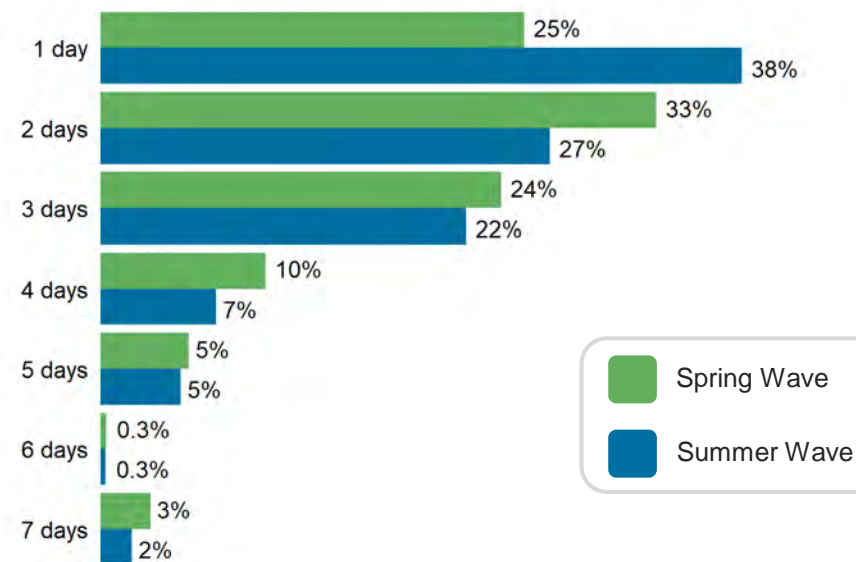
SPRING WAVE N = 1,037, SUMMER WAVE N = 939



Note: Respondents could select more than one answer to this question.

HOME PACKAGE DELIVERY FREQUENCY IN THE LAST 7 DAYS

SPRING WAVE N = 872, SUMMER WAVE N = 777





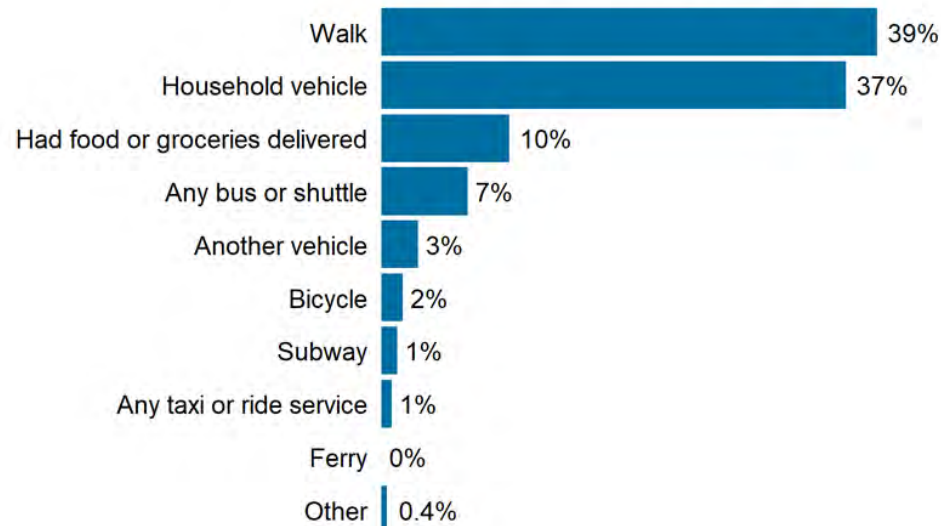
Travel Behavior Since Phase 1 of Reopening

FOOD MODE USE

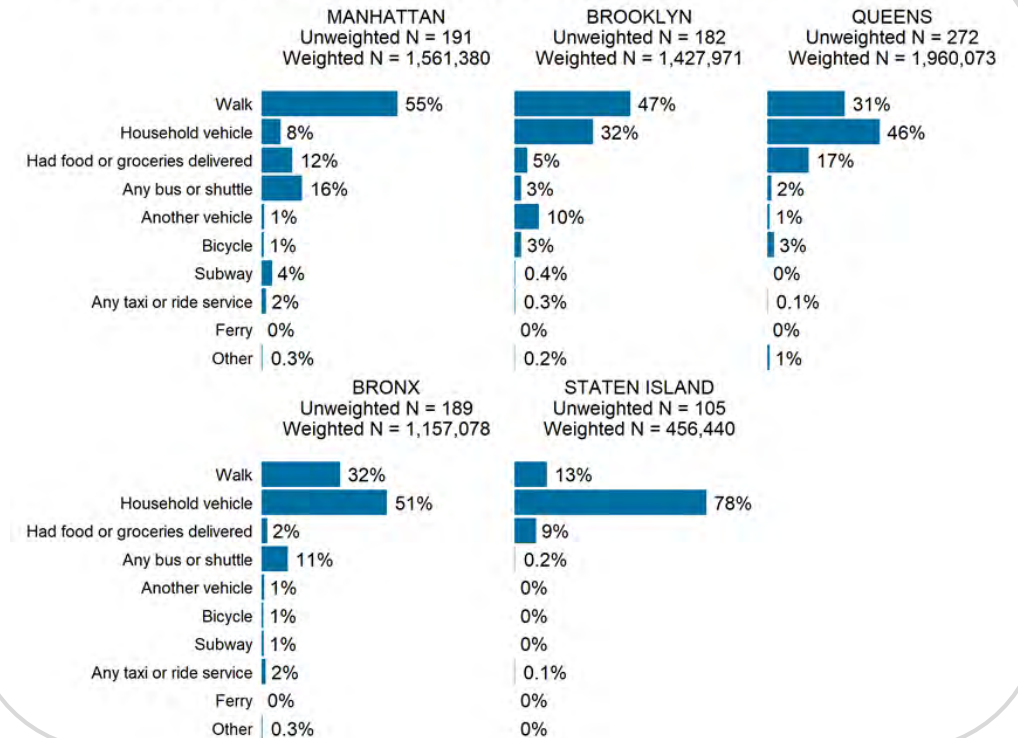
Most New Yorkers walked or traveled in a household vehicle the last time they shopped for food. 10% of New Yorkers had food or groceries delivered the last time they shopped for food.

MODE LAST USED TO SHOP FOR OR PICK UP FOOD

UNWEIGHTED N = 939, WEIGHTED N = 6,562,942



MODE LAST USED TO SHOP FOR OR PICK UP FOOD BY BOROUGH

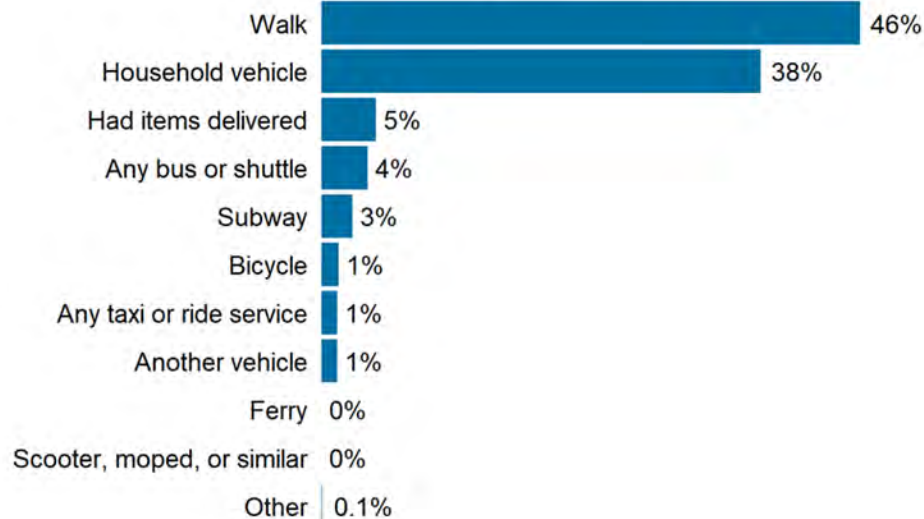


ERRAND MODE USE

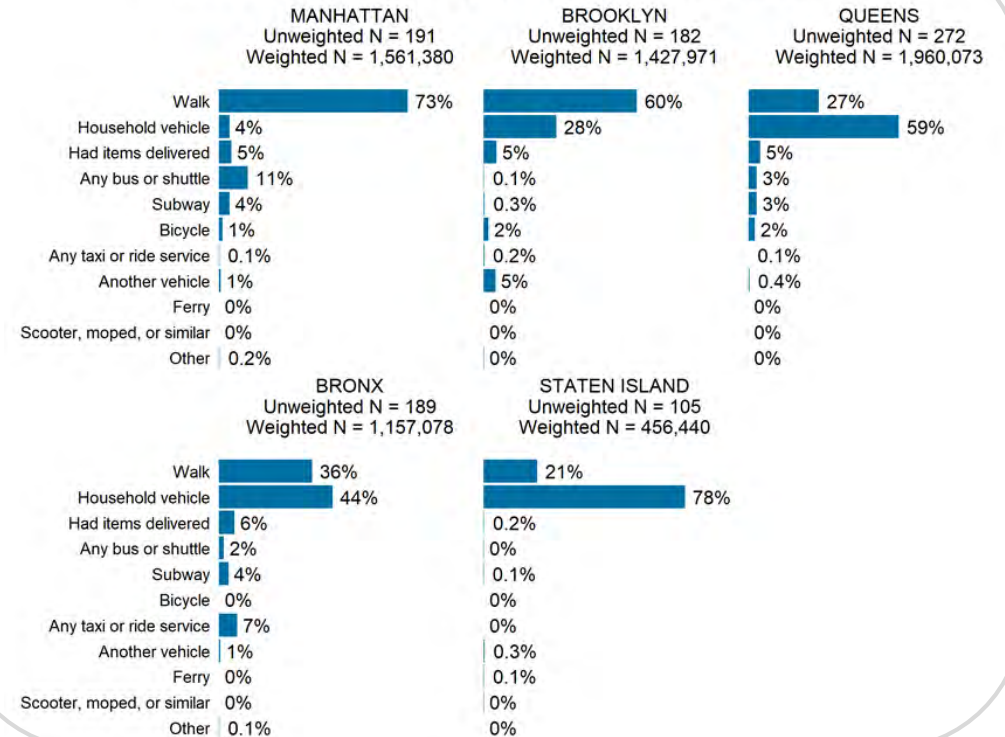
73% of Manhattan residents walked the last time they ran an errand, while 78% of Staten Island residents used a household vehicle.

MODE LAST USED TO RUN ERRANDS

UNWEIGHTED N = 939, WEIGHTED N = 6,562,942



MODE LAST USED TO RUN ERRANDS BY BOROUGH

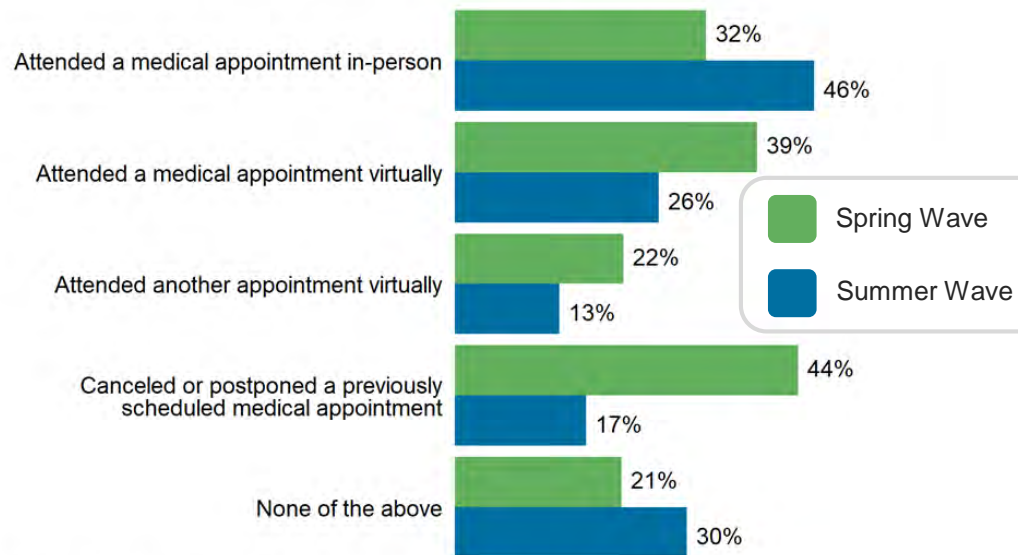


MEDICAL APPOINTMENTS SINCE JUNE 8, 2020

More New Yorkers are attending medical appointments in person and fewer New Yorkers are attending medical appointments virtually compared to the spring survey.

MEDICAL ACTIVITY

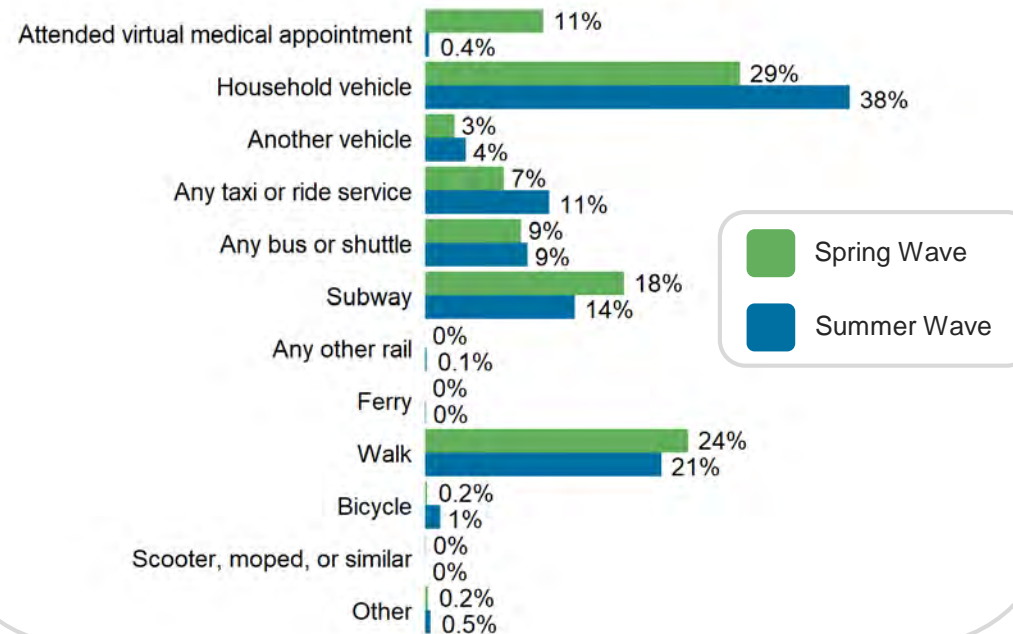
SPRING WAVE N = 1,037, SUMMER WAVE N = 939



Note: Respondents could select more than one answer to this question.

MODE LAST USED TO ATTEND MEDICAL APPOINTMENT

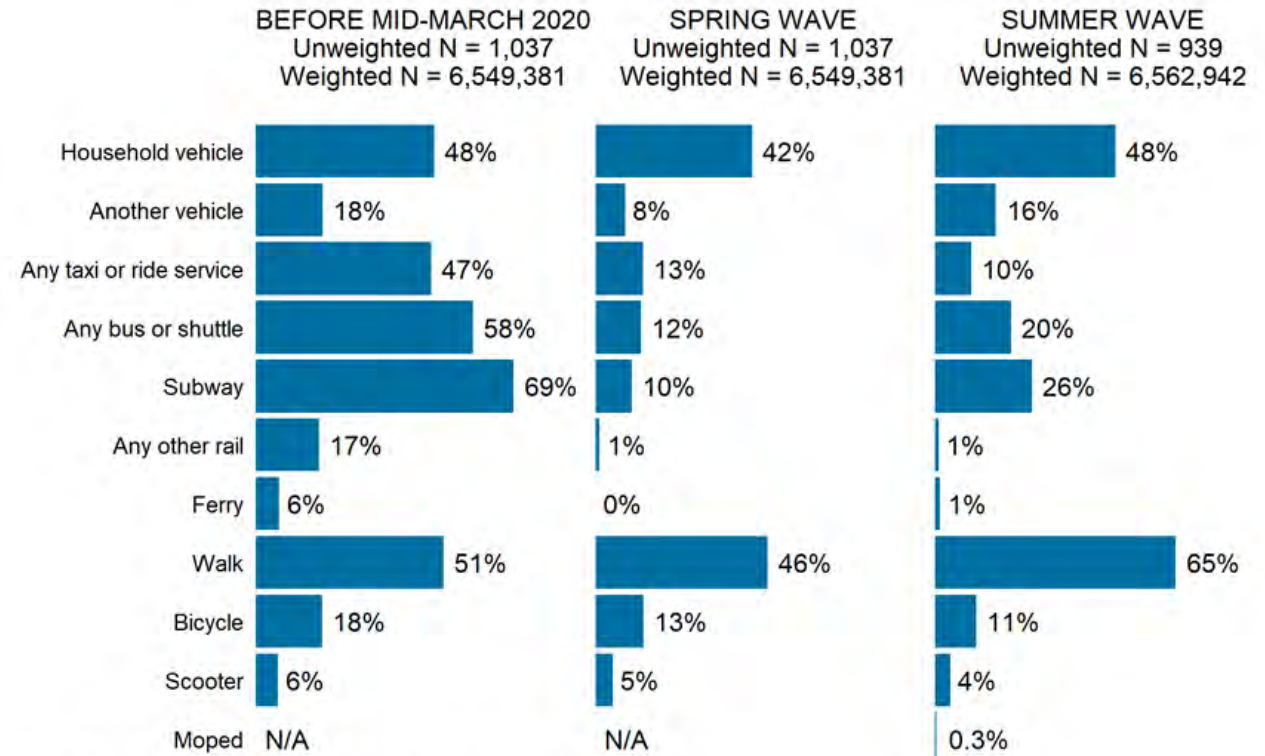
SPRING WAVE N = 225, SUMMER WAVE N = 460



MODES USED BEFORE AND DURING THE COVID-19 PANDEMIC

- 62% of New Yorkers who have used a personal vehicle since June 8, 2020 are using a personal vehicle to take trips they previously would have taken using another mode, an increase from 50% in the spring survey.
- The share of New Yorkers who use the bus in a typical week increased from 12% to 20% since the spring survey.
- The share of New Yorkers who use the subway in a typical week increased from 10% to 26% since the spring survey.

MODES USED IN A TYPICAL WEEK



Note: Respondents could select more than one answer to this question.
 Note: Moped was a new answer option in the summer wave.



Attitudinal Questions

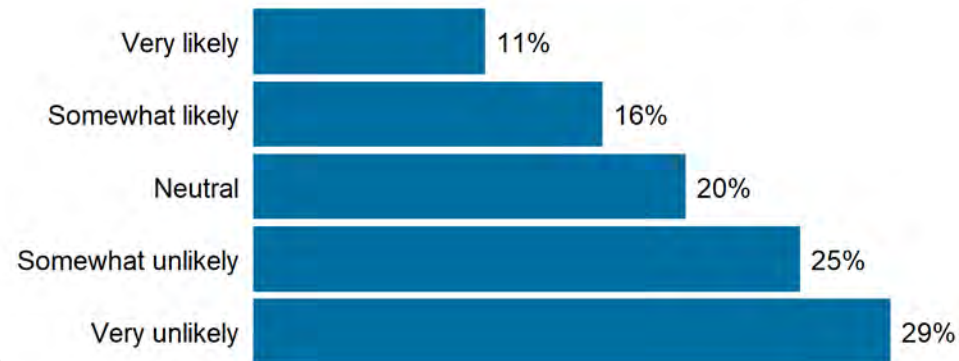
CURRENT ATTITUDES TOWARD USING PUBLIC TRANSIT

27% of New Yorkers who have not used public buses in a typical week since June 8, 2020 are likely to use the bus now that the MTA's Action Plan for a Safe Return is in place, and 54% are unlikely to.

28% of New Yorkers who have not used the subway in a typical week since June 8, 2020 are likely to use the subway now that the MTA's Action Plan for a Safe Return is in place, and 58% are unlikely to.

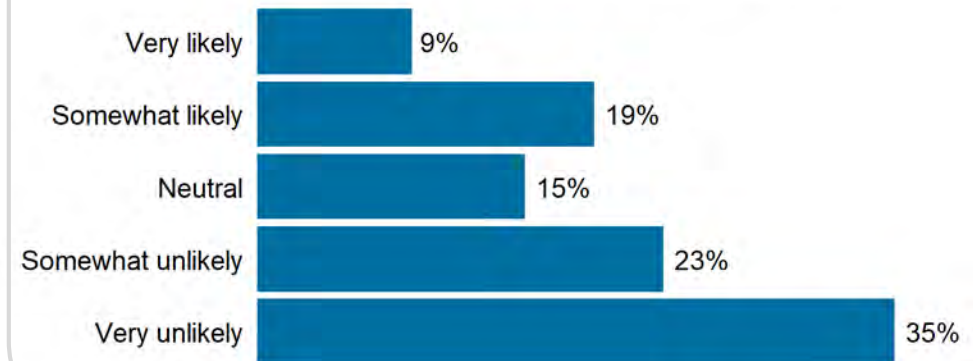
LIKELIHOOD TO USE PUBLIC BUSES

UNWEIGHTED N = 776, WEIGHTED N = 5,307,292



LIKELIHOOD TO USE THE SUBWAY

UNWEIGHTED N = 770, WEIGHTED N = 4,938,277



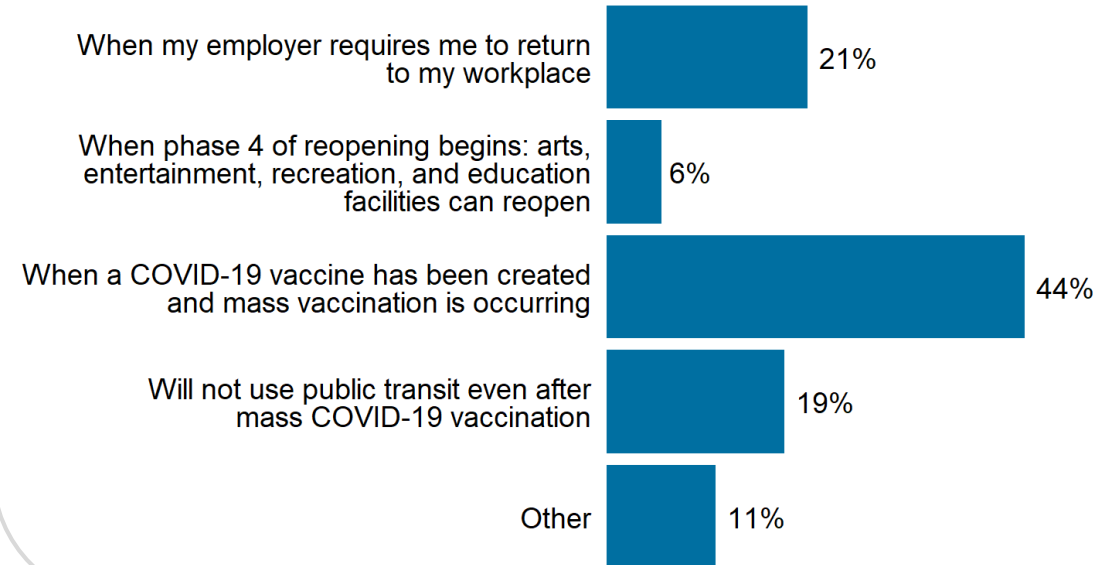
FUTURE PUBLIC TRANSIT USE

44% of New Yorkers who are unlikely or neutral to use the bus or subway state that they will begin to use public transit regularly when a COVID-19 vaccine has been created and mass vaccination is occurring.

19% of New Yorkers will not use public transit in New York City, even after mass COVID-19 vaccination is occurring.

FUTURE PUBLIC TRANSIT USE

UNWEIGHTED N = 649, WEIGHTED N = 4,337,545



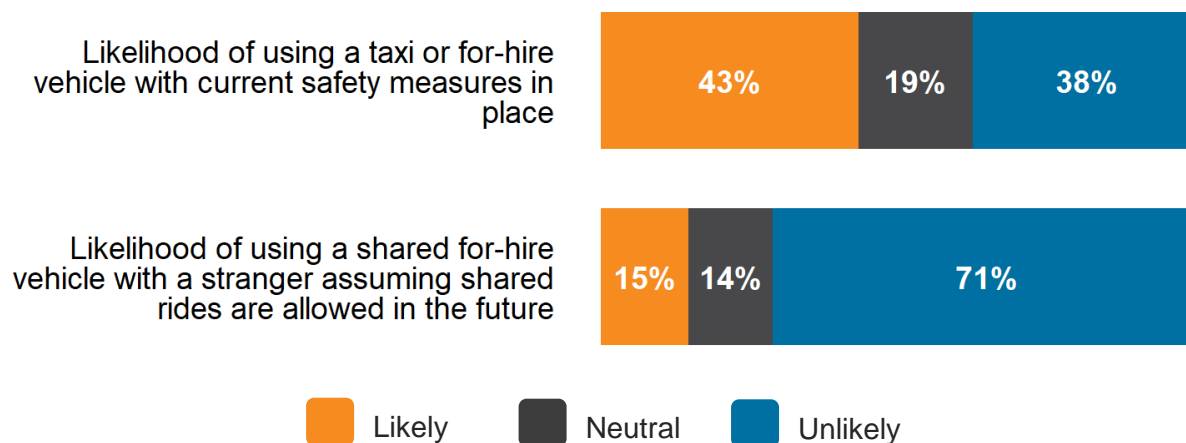
CURRENT ATTITUDES TOWARD FOR-HIRE VEHICLES

43% of New Yorkers are likely to use a for-hire vehicle with current safety measures in place.

71% of New Yorkers are unlikely to share a for-hire vehicle with a stranger if shared rides are allowed in the future.

ATTITUDES TOWARD FOR-HIRE VEHICLES

UNWEIGHTED N = 959, WEIGHTED N = 6,669,853

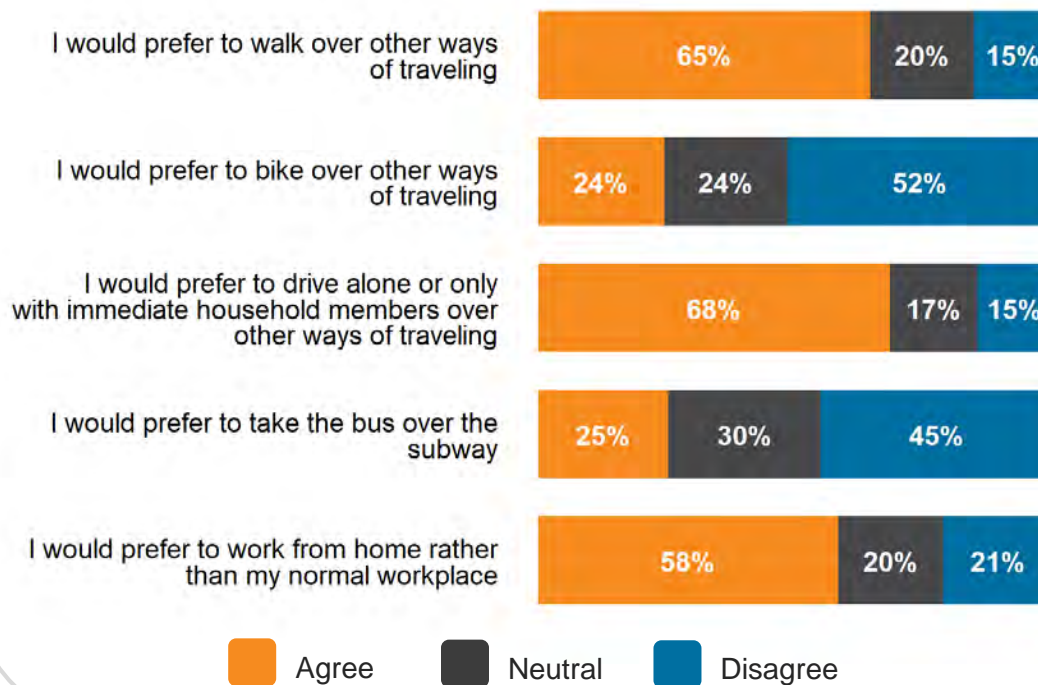


CURRENT ATTITUDES TOWARD TRAVEL

The share of New Yorkers who would prefer to drive alone and the share who would prefer to walk over other ways of traveling both increased by 6 percentage points since the spring survey.

ATTITUDES TOWARD TRAVEL

UNWEIGHTED N = 959, WEIGHTED N = 6,669,853



ATTITUDES TOWARD LEAVING NEW YORK CITY

Younger New Yorkers and New Yorkers with household incomes over \$100,000 are significantly less likely to move out of New York City to avoid future surges of COVID-19 cases and significantly more likely to move due to a decrease in arts, recreation, and entertainment opportunities.

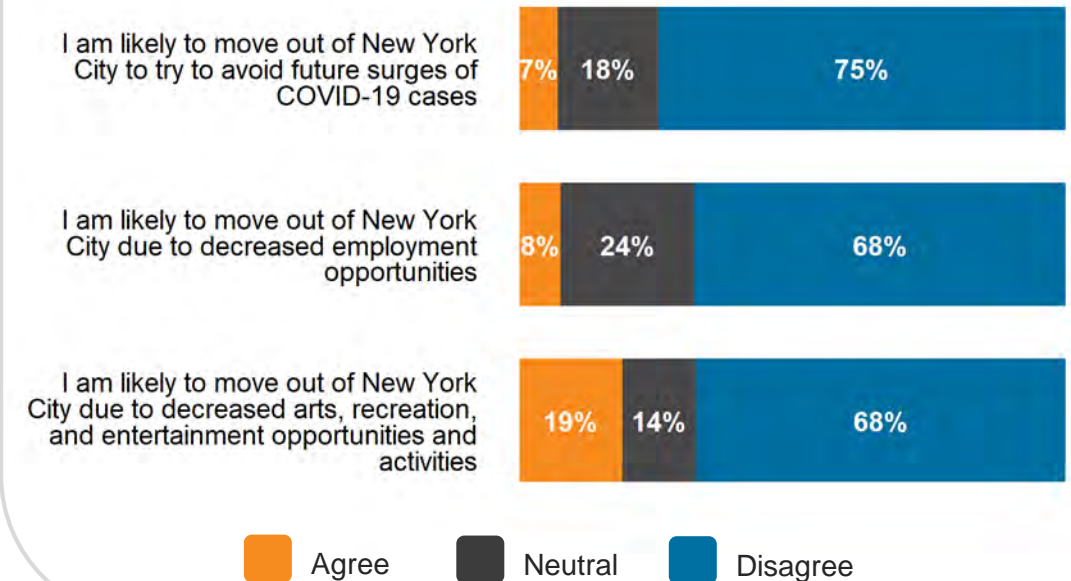
New Yorkers making less than \$50,000 are significantly more likely to move due to a decrease in employment opportunities.

White and Black New Yorkers are equally likely to move due to a decrease in employment opportunities.

Note: These statements are based on a logistic regression model.

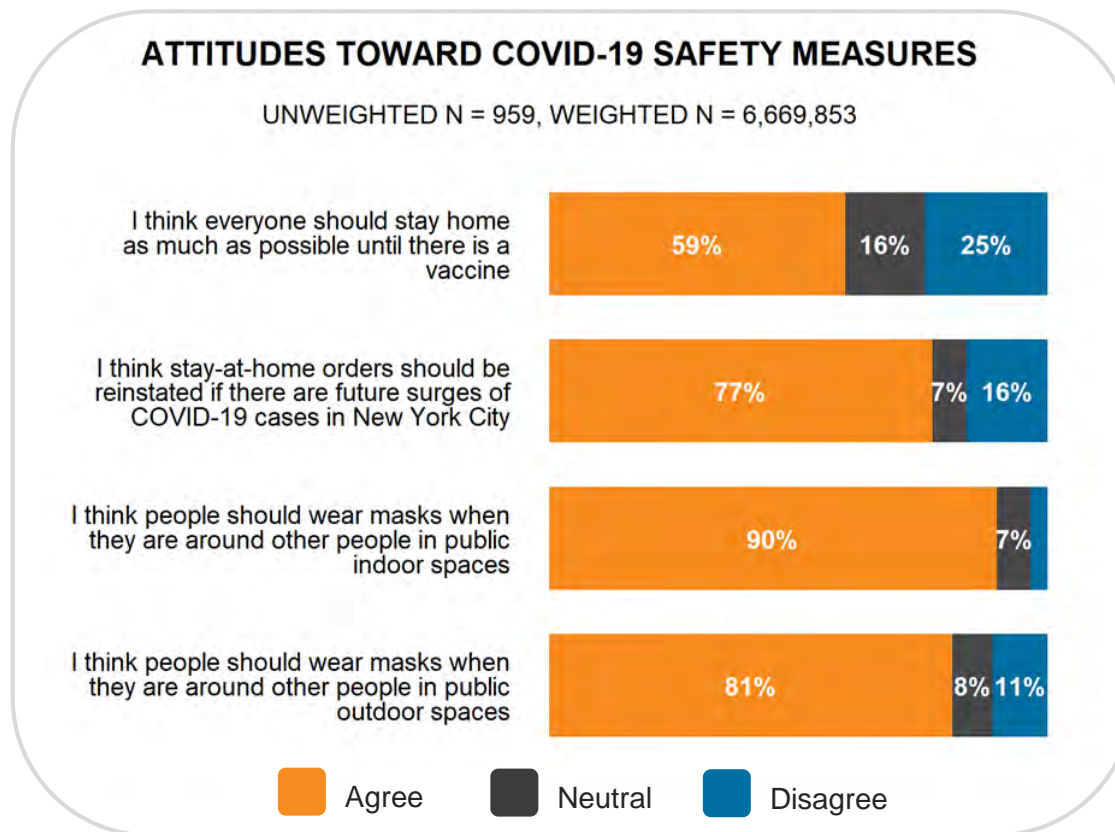
ATTITUDES TOWARD LEAVING NEW YORK CITY

UNWEIGHTED N = 959, WEIGHTED N = 6,669,853



ATTITUDES TOWARD COVID-19 SAFETY MEASURES

The share of New Yorkers who agree that everyone should stay at home as much as possible until there is a vaccine decreased by 9 percentage points since the spring survey.





**CITYWIDE
MOBILITY
SURVEY**

Vehicle Ownership

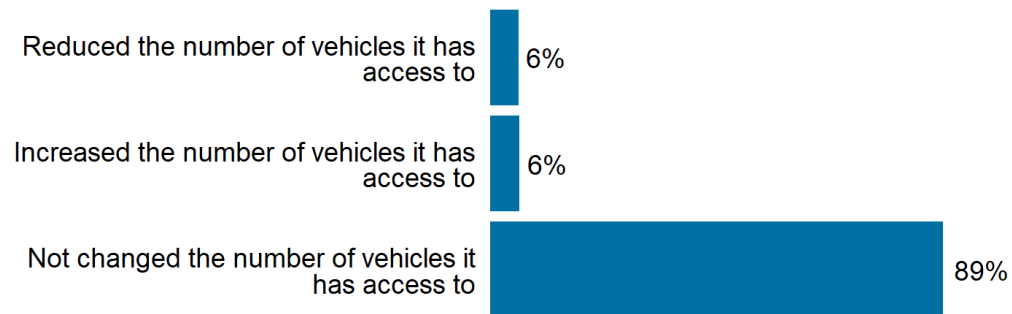
CHANGE IN VEHICLE OWNERSHIP

6% of New Yorkers have reduced the number of vehicles their household has access to during the COVID-19 pandemic.

An equal share have increased the number of vehicles they have access to.

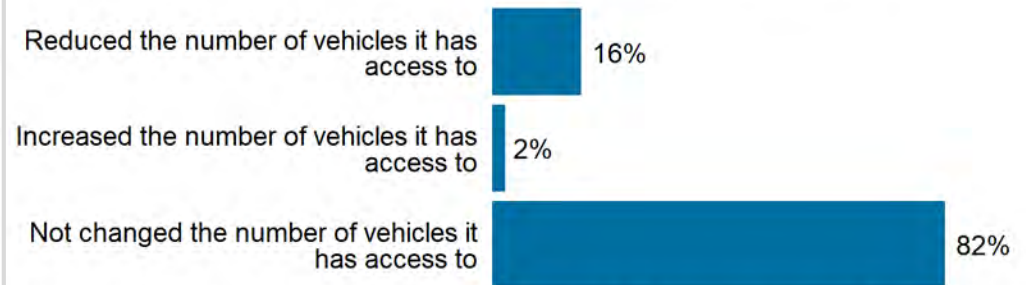
CHANGE IN NUMBER OF HOUSEHOLD VEHICLES SINCE THE BEGINNING OF THE COVID-19 PANDEMIC

UNWEIGHTED N = 959, WEIGHTED N = 6,669,853



FROM THE 2019 CMS: CHANGE IN NUMBER OF HOUSEHOLD VEHICLES IN THE PAST TWO YEARS

UNWEIGHTED N = 949, WEIGHTED N = 6,654,508



Note: The sample size for this figure is smaller due to non-response in the 2019 CMS.

VEHICLE OWNERSHIP DECISION-MAKING

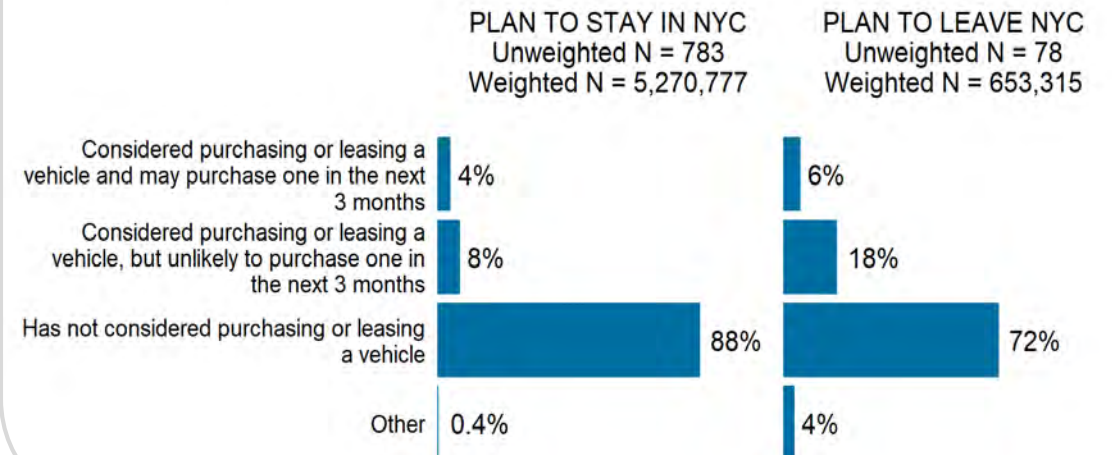
88% of New Yorkers who do not plan to move outside of New York City and have not changed the number of vehicles they have access to during the pandemic have not considered purchasing or leasing a vehicle.

Younger New Yorkers, Black New Yorkers, and Hispanic New Yorkers are significantly more likely to have obtained a vehicle during the COVID-19 pandemic or be interested in obtaining a vehicle.*

Northern Bronx and Outer Brooklyn residents are significantly less likely to have obtained a vehicle during the COVID-19 pandemic or be interested in obtaining a vehicle.*

**Note: These statements are based on a logistic regression model.*

HOUSEHOLD VEHICLE DECISION-MAKING



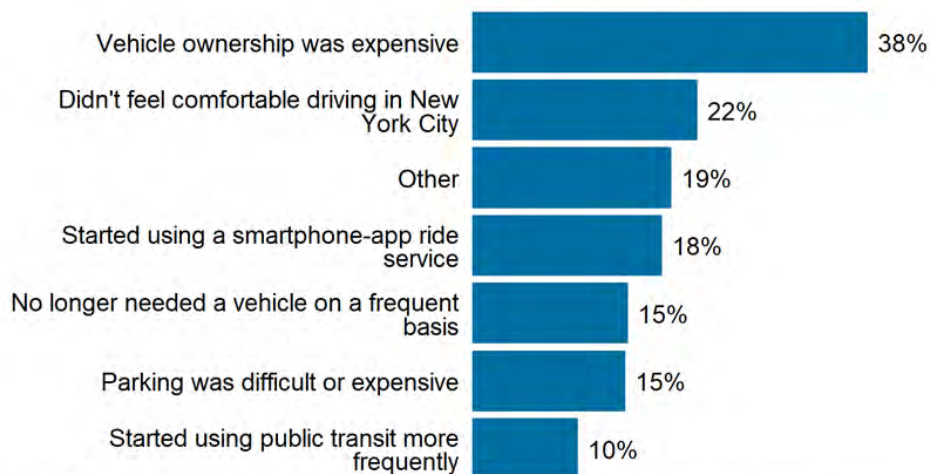
REASONS TO INCREASE/DECREASE VEHICLES

32% of New Yorkers who obtained a vehicle during the COVID-19 pandemic did so because they felt uncomfortable using other transportation modes due to the COVID-19 pandemic.

Note: The estimates in the figures below have large margins of error due to the small sample sizes.

REASONS FOR REDUCING NUMBER OF HOUSEHOLD VEHICLES

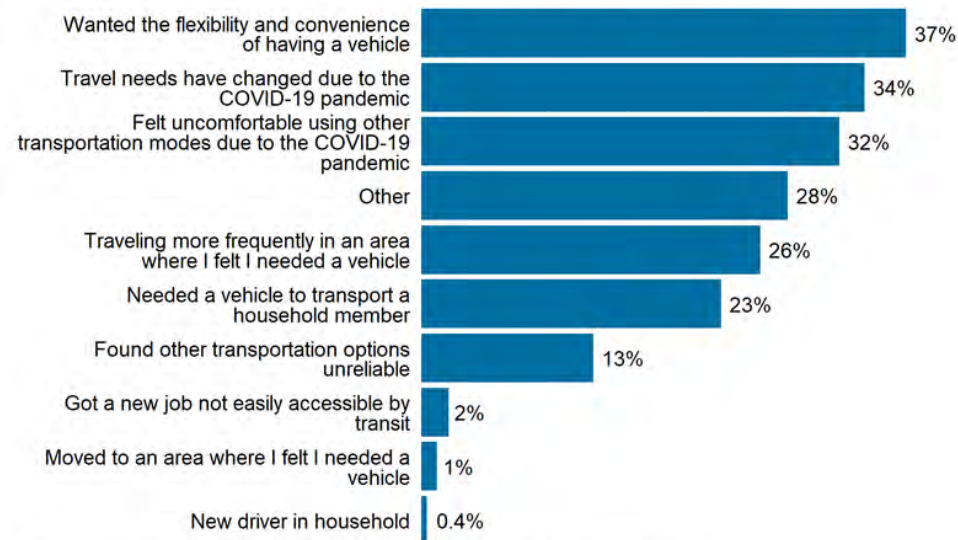
UNWEIGHTED N = 53, WEIGHTED N = 366,875



Note: Respondents could select more than one answer to this question.

REASONS FOR INCREASING NUMBER OF HOUSEHOLD VEHICLES

UNWEIGHTED N = 45, WEIGHTED N = 378,886



Note: Respondents could select more than one answer to this question.



Contacts

www.rsginc.com

JOANN LYNCH
Project Manager

Rachel Schmidt
Lead Analyst