



# NYC DEPARTMENT OF TRANSPORTATION

## CITYWIDE MOBILITY SURVEY 2018

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Prepared by PSB

November 2018



# AGENDA

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- (4) Car Ownership & Access [p. 41]
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# Objectives & Methodology

# 1

# OBJECTIVES

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- Track results from last year's survey to investigate year-over-year trends regarding transportation preferences and usage patterns
- Understand the factors and experiences that drive transportation choices for New York City residents
- Assess views on the current state of transportation within New York City
- Measure reactions and perceptions to relevant trends and topics in New York City transportation



# METHODOLOGICAL OVERVIEW

- Telephone & online survey among n=3,301 New York City Residents age 18+



**n=2,500**

- Sample of New York City general population via RDD.
- 60% of completes were completed via landline, 40% via cell phone.



**n=801**

- Oversamples across 10 designated survey zones.
- Sample de-duped from phone survey via address and self-reported participation.

## Across both the phone and online modes:

- Pre-test occurred May 1-5, primary calling and contacts occurred May 3-June 24
- 87% of the interviews were conducted in English, 12% in Spanish (10% Spanish-speaking households), and 1% in Chinese (4% Chinese-speaking households)
- 73% of the trip diaries asked about weekday travel, 27% about weekend travel
- The 2018 phone sample was weighted to match the 5 year (2012-2016) American Community Survey average for NYC based on the following factors: age, gender, educational attainment, race, income, and borough. The 2017 sample was also weighted to the most recent 5-year ACS at the time (2011-2015)
  - The online sample was weighted to match the phone sample
- Phone sample has a margin of error of 1.96%, down from last year (2.3%) due to the increase in phone sample size
- Overall incidence rate for the survey, showing completion rate out of total survey starts, was 46%
- The response rate for completes out of the total sample contacted was 1%
- The response rate for completes out of the total sample that was reached was 8%
  - Distinction between contacted/reached was based on if the potential respondent was both contacted and eligible

# CHANGES IN METHODOLOGY

	2017 (Wave 1)	2018 (Wave 2)
<b>Sample size</b>	N=3,600 total N=1,800 phone N=1,800 online	N=3,300 total N=2,500 phone N=800 online
<b>Oversamples</b>	Oversample in the 10 survey zones to reach ~n=350 per zone	Oversample in the 10 survey zones to reach ~n=300 per zone

- This year's methodology shifted towards more phone interviews and less online than last year:
  - 2018: 75% phone; 25% online
  - 2017: 50% phone; 50% online
- Additional probes were added, including automatic probes if they indicated they did not start or end their day at home, and probes broken out by morning/afternoon/evening. This tripled the number of probes asked if respondents were not recalling every trip from the prior day
- Adjustments were made to how multi-punch, perceptual questions were asked to minimize the modal affect. Those taking the survey online were more likely to select more than one option than those on the phone. Thus, multi-punch questions were asked as yes/no metrics for each answer choice
- Captured address of origin for each trip, in addition to the address of each trip destination
- Captured how long it took to get to/from the transit boarding location
- Removed the "return home" choice for trip purpose
- Respondents were asked to enter their addresses differently online vs. phone. For online, a custom tool was developed that allowed respondents to drop a pin at their location (or the closest cross street), automatically coding GPS location, NTA, survey zone, zip code, and borough. Over the phone, respondents were asked for the address, and if refused, asked for the nearest cross street and then the zip code

# A NOTE ON REPORTING

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- This report contains data from both the phone and online survey
- Data at the All NYC or All NYC Trip level (and relevant demographic sub-groups) includes only the phone survey data, not the online data
- Data at the zone level (e.g. Manhattan Core) or zone trip level includes both the online and phone survey data (combo data)
  - Combo data is in line with demographic trends within each survey zone based on publicly available census data
- In this report, trip diary data is aggregated by trip and not respondent – percentages indicate the share of trips with each characteristic. All other data is aggregated by respondent – percentages indicate the share of New York City residents with each characteristic
- Significance testing is calculated at the 95% confidence level for year-over-year comparisons
  - Significance was not reported on between the phone and online samples, as the absolute modal bias is not directly measurable with the methodology
  - For questions with significant modal bias (multi-punch, perception), a 10% or greater difference against the base is highlighted
  - Statistical significance indicated at the 95% confidence interval is standard for probabilistic general population samples

# RE-CONTACT METHODOLOGY

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Upon review by the client, three errors were identified that were rooted back to the questionnaire stage concerning logic or typos. Re-contact took place for both phone and online with revised questions. The re-contact process took place from Thursday 8/30 through Monday 9/17, resulting in 19 days of fielding. Overall we were able to re-contact 797 respondents, reaching 562 over the phone and 235 online.

- **Change 1:** In the Ride Hail section, online respondents were shown a question with “Gett” as a possible response. The correct response was “Chariot,” which phone respondents were asked. According to the final questionnaire, Chariot should have been included in both phone and online responses. It was asked correctly over the phone but incorrectly online.
  - In order to rectify this mismatch, PSB went back into field to reach as many of the 800 online survey respondents as possible to rebuild the data for the affected portion (online) of the survey (substituting “Chariot” for “Gett” as a response) with the expectation of completing ~200 interviews. We ended up with 210 completes.
- **Change 2:** In the Bicycle section, a series of questions (Q25f-j) were incorrectly filtered to be asked of only bike owners, but should have been asked of all respondents. This was correctly asked of all respondents online, but only asked of bicycle owners on the phone.
  - In order to rectify this logic error, PSB went back into field to reach as many of the 1,597 phone survey respondents as possible to rebuild the data for the affected portion (phone) of the survey (fixing the logic so that all respondents were able to answer, not just bike owners) with the expectation of completing ~600 interviews. We ended up with 531 number of completes.
- **Change 3:** In the State of Public Transportation section, among those who say they are using the bus less, Q28F asks them what mode of transportation they are using instead of the bus. C2 was mistakenly listed as “bus” instead of “subway”.
  - In order to rectify this mismatch, PSB went back into field to reach as many of the 307 phone and online survey respondents as possible to rebuild the data for the affected portions (both phone and online) of the survey (substituting “Subway” for “Bus” as a response) with the expectation of completing ~100 interviews. We ended up with 88 number of completes.

# RE-CONTACT WEIGHTING

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- PSB's marketing sciences team performed a series of statistical analyses to investigate:
  1. Whether the re-contact data are demographically skewed
  2. If the data are skewed, whether the skew was due to the demographic make-up of the re-contact respondents
- The team found marginal (non-significant) skewing in the re-contact data, but the strength of the relationship is very weak and most of the skew can be attributed to the marginal skewing we see in the overall sample due to under/over sampling certain demographic categories
- In other words, we are not concerned that the missing data will cause any significant distortions of the data, nor do we believe the missing data will require us to apply any extra weighting on either the re-contact cases themselves or the dataset at large
- We also had our marketing sciences team run some preliminary analyses to investigate whether the skewing was affecting any attitudinal variables, and they were able to confirm that the marginal skewing is confined to demographic variables, so none of the attitudinal or behavioral questions will be affected

# CITYWIDE PHONE SAMPLE PROFILE

Demographic Breakdown – Phone Sample		2018 Unweighted Sample	2018 Weighted Sample	ACS 5-Year Average (2012-2016)	2017 Weighted Sample
Age & Gender	Male – 18-34 years old	10%	16%	17%	16%
	Male – 35-54 years old	16%	17%	17%	16%
	Male – 55 and older	13%	15%	14%	13%
	Female – 18-34 years old	15%	17%	18%	18%
	Female – 35-54 years old	26%	18%	18%	18%
	Female – 55 and older	21%	17%	18%	18%
Ethnicity	White / Caucasian, non-Hispanic	35%	36%	32%	34%
	Black /African American / Caribbean American	35%	28%	25%	26%
	Asian	5%	13%	14%	13%
	Other (Including American Indian & Pacific Islander)	22%	21%	18%	17%
	Hispanic / Latino (Including Puerto Rican, Mexican, Cuban)	30%	30%	29%	26%
HH Income	Less than \$25,000 per year	23%	26%	28%	26%
	\$25,000 – \$49,999 per year	22%	20%	20%	24%
	\$50,000 – \$99,999 per year	25%	27%	26%	30%
	\$100,000 - \$149,999 per year	10%	16%	13%	11%
	\$150,000 and over per year	11%	6%	14%	10%
Borough	Manhattan	21%	21%	19%	19%
	Brooklyn	33%	30%	31%	31%
	Queens	21%	27%	27%	27%
	Bronx	19%	16%	17%	17%
	Staten Island	6%	6%	6%	6%
Jobs	Employed (Including full-time and part-time)	63%	62%	58%	60%
	Unemployed	7%	7%	6%	7%
Disability*	Any disability	17%	16%	10%	13%
	Ambulatory – Difficulty walking or climbing stairs	8%	7%	5%	8%
	Vision disability – Blind or have difficulty seeing	2%	3%	2%	2%
	Hearing disability – Deaf or have difficulty hearing	2%	2%	2%	1%

# FIELDING TIMELINE SNAPSHOT

- The survey fielded over the course of seven weeks, with temperatures between 50 and 94 degrees and no days with precipitation of more than one inch
- Notable holidays and events during this time period include Mother's Day, Father's Day, Memorial Day, the Puerto Rican Day Parade, the Mermaid Parade, Israel Day Parade, Eid al-Fitr, and the Pride Parade

May 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

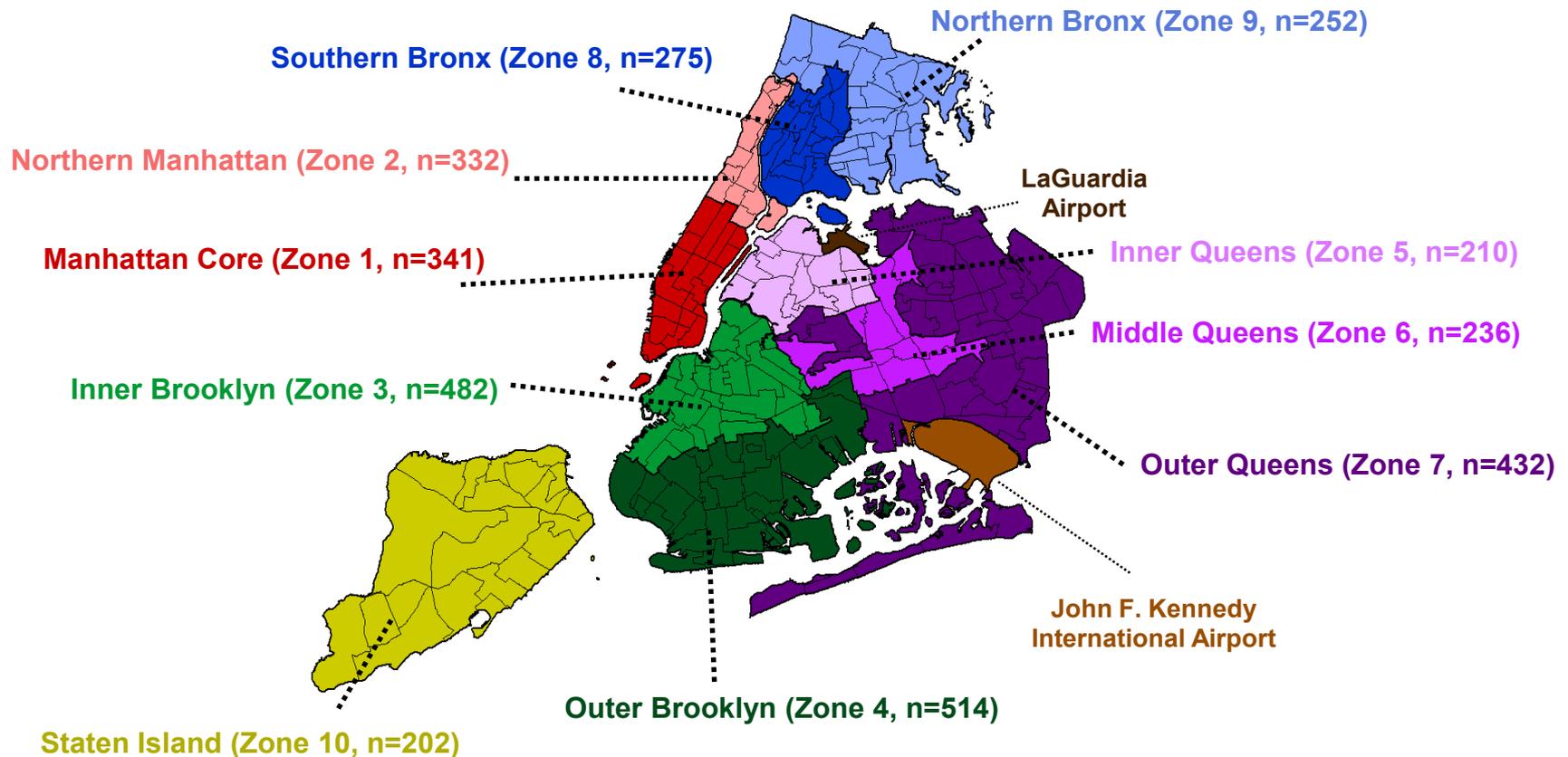
June 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17*	18	19	20	21	22	23
24	25	26	27	28	29	30

■ Days with 1" of precipitation or more     
 ■ Days with temperature above 90 degrees     
 ■ Notable holiday or event

*\*NOTE: Dates with an asterisk indicate a notable holiday in addition to a temperature exceeding 90 degrees. Weather data sourced from the National Weather Service's Central Park Observatory readings.*

# SURVEY ZONES

- We used online oversamples to supplement the phone survey and reach a readable sample size in 10 geographical zones based on census-derived Neighborhood Tabulation Areas (NTAs)



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# Trip Diary Profiling

(Trip Level Data)

# 2

# TRIP DIARY – METHODOLOGICAL DETAILS

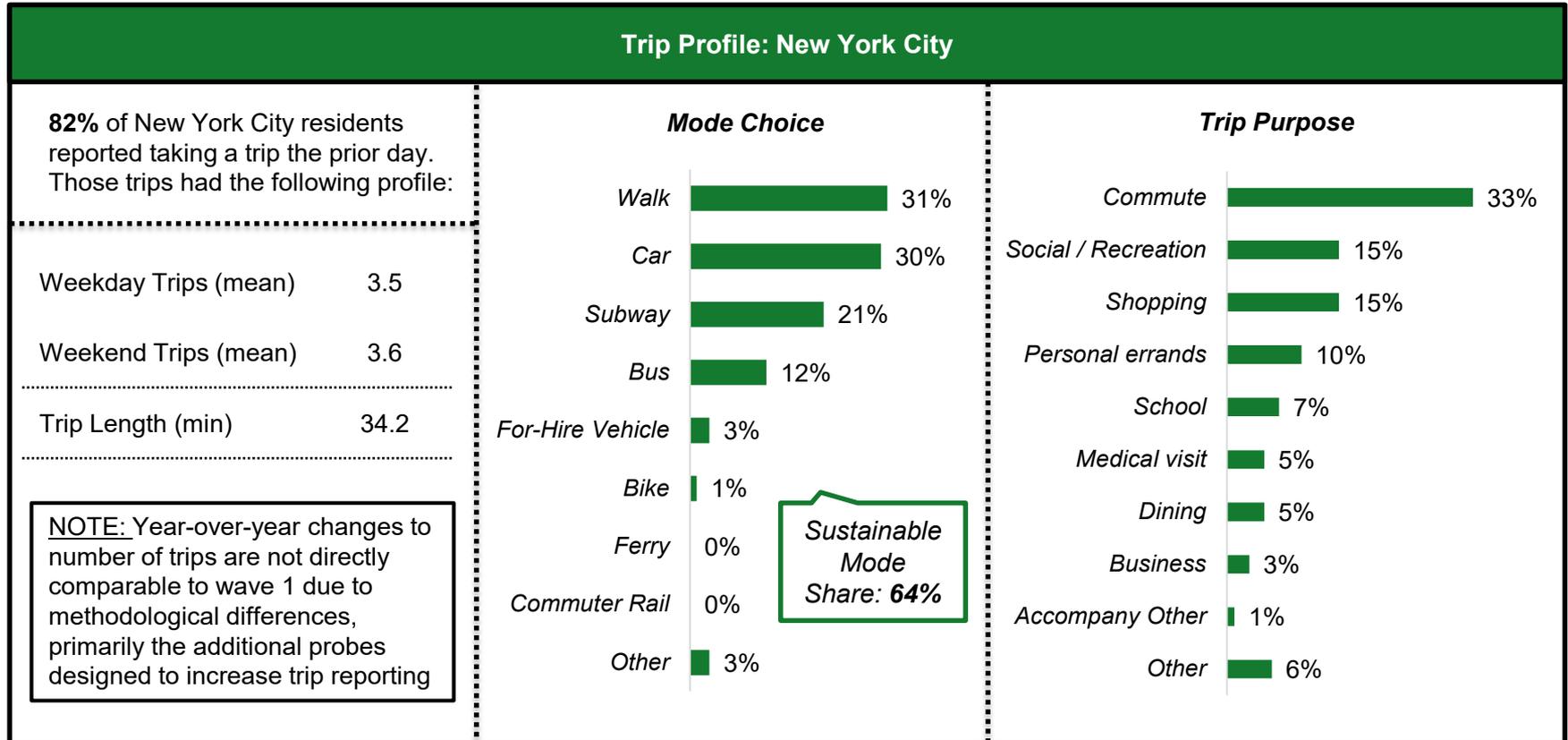
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- Each respondent was asked to give a detailed description of all trips taken the prior day. This included the following questions:
  - Trip origin & destination
  - Transportation modes taken
  - Trip length
  - Trip purpose
  - Location of destination
  - How typical the trips that day were
- This year, additional probes were added to encourage complete and accurate trip reporting, including ensuring that the destination of respondents' last trip was where they ended their day
- In total, we captured trip details for 7,977 trips: 6,063 trips captured over the phone, 1,914 online
  - In 2017 we captured trip details for 6,986 trips: 3,252 over the phone and 3,734 online
- In this section, data is aggregated by trip and not respondent – percentages indicate the share of trips with each characteristic
- “All NYC Trips” refers to phone data only; online data is only included at the survey zone level

# 2018 TRIP DIARY SNAPSHOT

PHONE ONLY (N = 6,063)

- New Yorkers are most likely to use public transit, with 33% of trips occurring by subway or bus
- 64% of trips were by a sustainable mode such as walking, biking, or transit



# TRIP TAKING – TYPICAL DAY

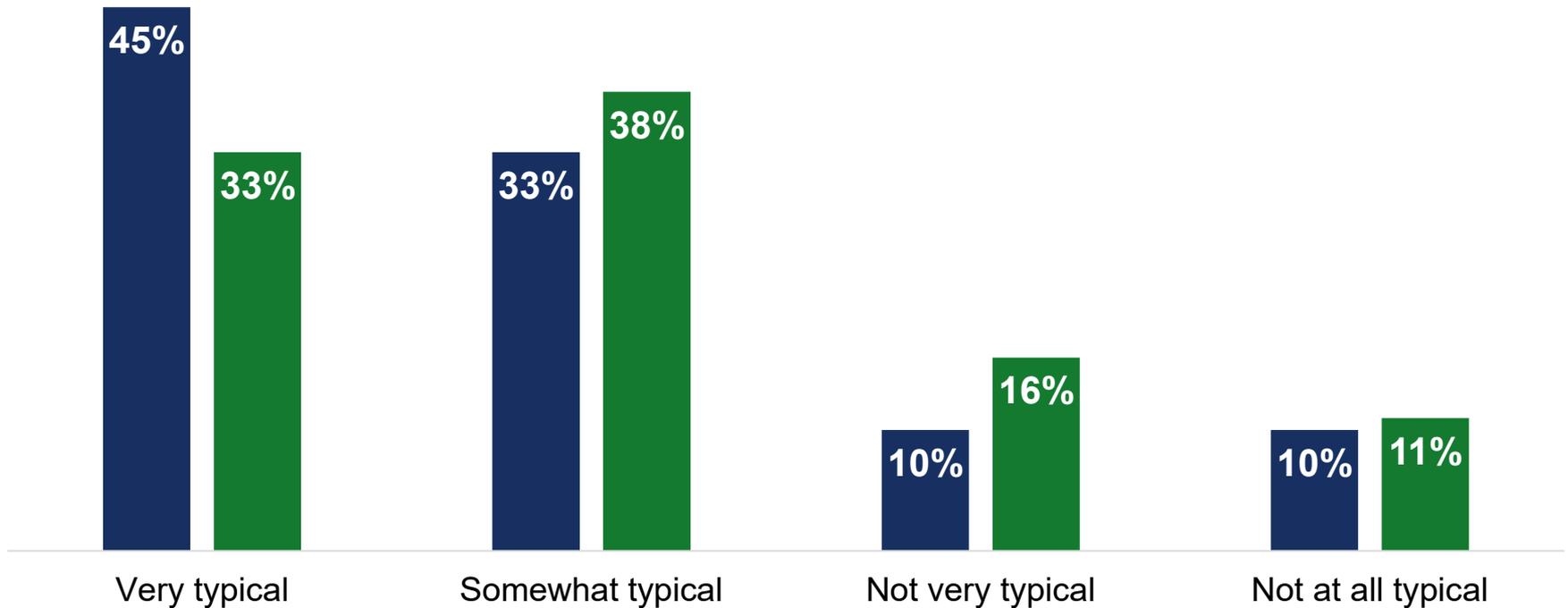
*PHONE ONLY (N = 6,063)*

- Weekday respondents reported their days as “typical” more often than weekend respondents
- Three quarters (78%) of weekday respondents said their travel that day was either “very” or “somewhat” typical. 71% of weekend respondents said their weekend day was typical

## Trip Taking - Typical

*Showing All NYC (Phone)*

■ Weekday ■ Weekend



# TRIP DURATION

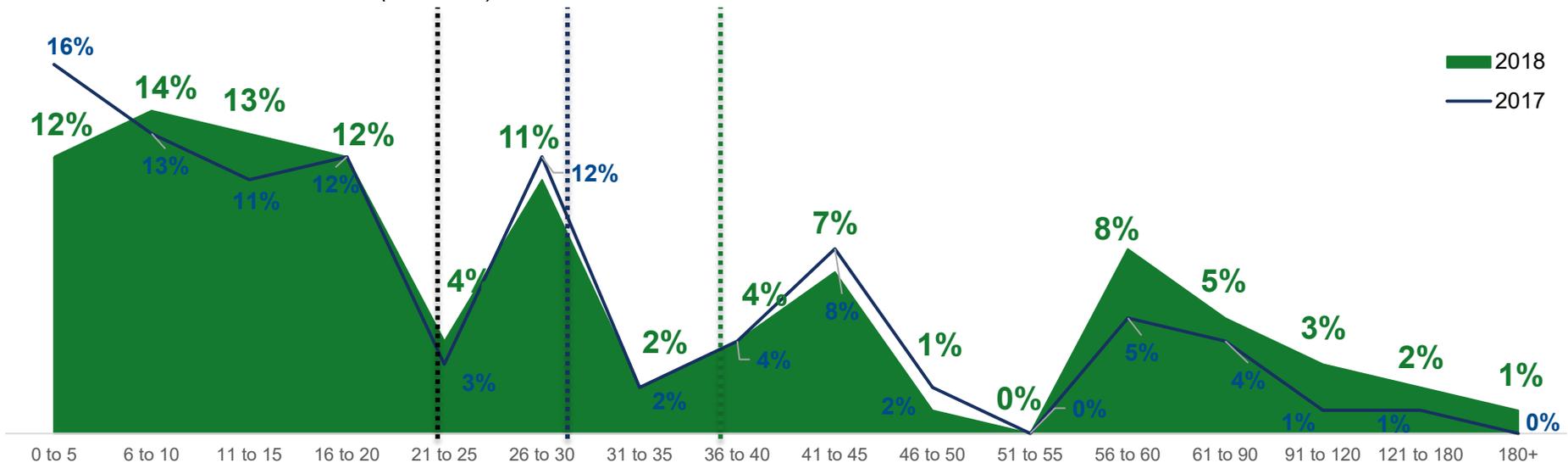
## PHONE ONLY

- An average trip lasts 34 minutes, about half (49%) last less than 20 minutes
- Average trip length is up 2 minutes since last year, though the median trip length remained the same (20 minutes)

How long did it take you to get to your destination?

Showing all NYC

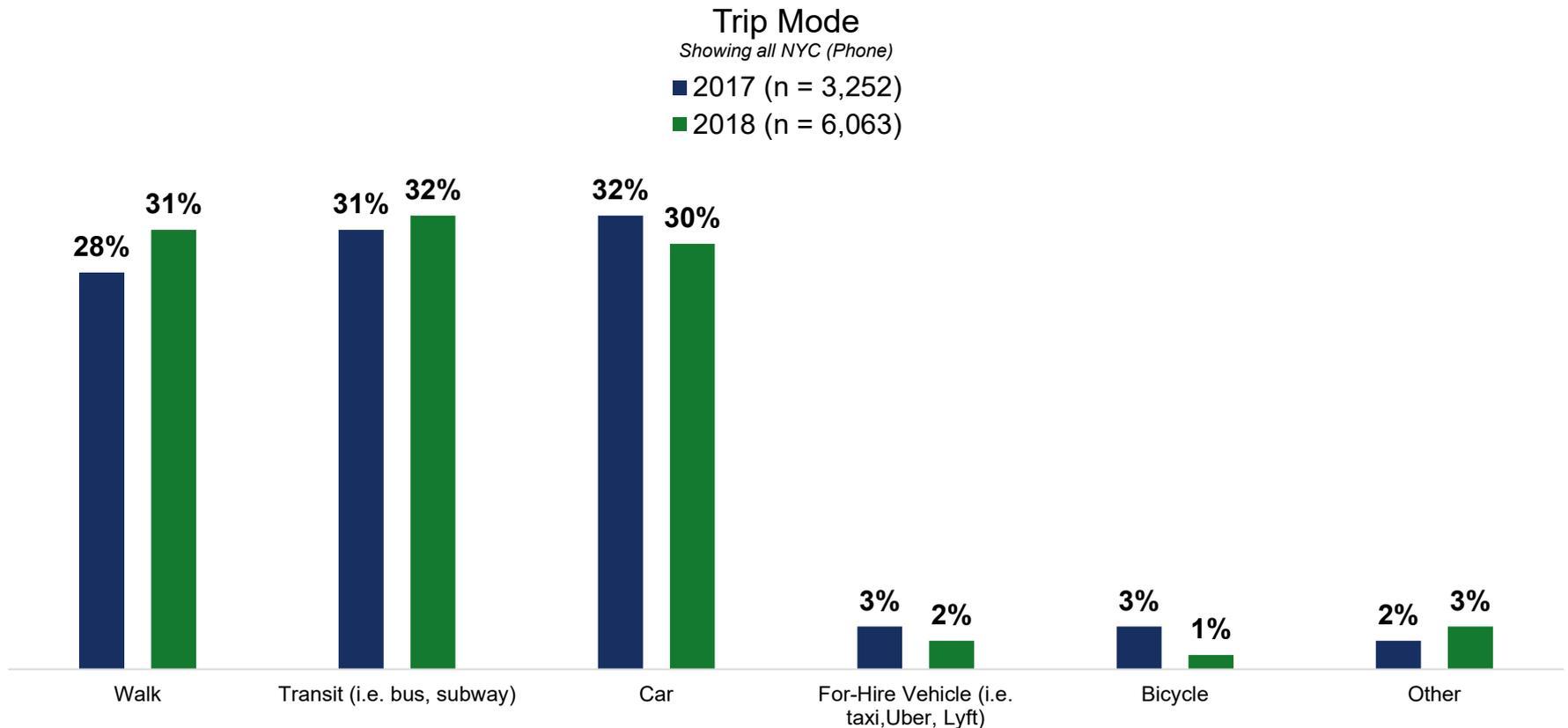
Median:  
20 minutes ('17 & '18)  
2017 Mean: 32 minutes  
2018 Mean: 34 minutes



# TRIP MODE

## PHONE ONLY

- New Yorkers mostly walk, take transit, or a car to get to their destination (relatively unchanged since 2017)



# TRIP MODE – WEEKDAY VS WEEKEND

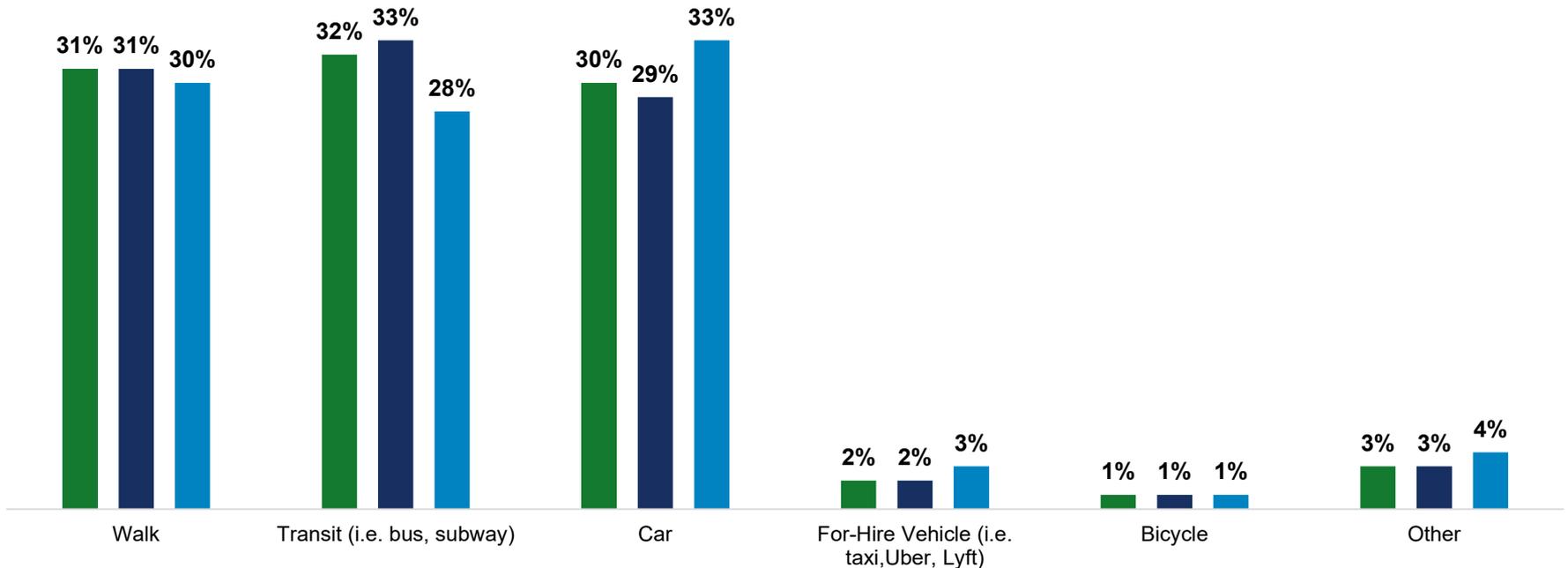
## PHONE ONLY

- Walking, transit, and car are the most common modes, regardless of weekday, though car trips are slightly more common on weekends

Trip Mode (n = 6,063)

Showing all NYC (Phone)

■ Overall ■ Weekday ■ Weekend



# MODAL BREAKDOWN

## PHONE & ONLINE (COMBO)

- Manhattan Core, Northern Manhattan, Inner Brooklyn, and Inner Queens residents are significantly more likely to take trips that are only walking
- Inner Queens, Outer Queens, Middle Queens, and Staten Island residents are significantly more likely to utilize car, while Manhattan Core residents are the most likely to utilize the subway

Modal Breakdown by Survey Zone Residence	All NYC Trips (n=6,063)	Manhattan Core Trips (n=820)	Northern Manhattan Trips (n=783)	Inner Brooklyn Trips (n=1,173)	Outer Brooklyn Trips (n=1,238)	Inner Queens Trips (n=519)	Middle Queens Trips (n=520)	Outer Queens Trips (n=1,094)	Southern Bronx Trips (n=633)	Northern Bronx Trips (n=653)	Staten Island Trips (n=489)
Trip Duration (min.)	34.2	29.2	40.5	30.1	34.8	36.1	28.9	32.1	34.4	37.6	30.7
Walk	31%	50%	37%	45%	33%	41%	30%	18%	33%	31%	11%
Car	30%	8%	14%	16%	30%	18%	36%	53%	18%	26%	67%
Subway	21%	26%	28%	25%	18%	30%	18%	10%	22%	21%	3%
Bus	12%	7%	15%	8%	9%	5%	8%	12%	22%	14%	12%
For-Hire Vehicle	2%	4%	3%	2%	4%	1%	2%	2%	3%	3%	1%
Bike	1%	1%	1%	1%	1%	2%	3%	0%	0%	0%	0%
Commuter Rail	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Ferry	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%
Other	3%	3%	2%	3%	4%	2%	4%	5%	2%	4%	4%

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

# MODAL BREAKDOWN – TRACKING (1 OF 2)

**PHONE & ONLINE (COMBO)\***

2018 vs 2017

Modal Breakdown by Survey Zone Residence	All NYC Trips (n=6,063)	Manhattan Core Trips (n=820)	Northern Manhattan Trips (n=783)	Inner Brooklyn Trips (n=1,173)	Outer Brooklyn Trips (n=1,238)
Trip Duration (min.)	34.2	29.2	40.5	30.1	34.8
Walk	31% (28%)	50% (47%)	37% (33%)	45% (32%)	33% (28%)
Car	30% (32%)	8% (6%)	14% (7%)	16% (26%)	30% (40%)
Subway	21% (23%)	26% (22%)	28% (37%)	25% (29%)	18% (20%)
Bus	12% (8%)	7% (10%)	15% (14%)	8% (5%)	9% (5%)
For-Hire Vehicle	2% (3%)	4% (6%)	3% (3%)	2% (4%)	4% (2%)
Bike	1% (3%)	1% (6%)	1% (2%)	1% (3%)	1% (3%)
Commuter Rail	0% (0%)	0% (0%)	0% (0%)	0% (0%)	0% (0%)
Ferry	0% (0%)	0% (0%)	0% (0%)	0% (0%)	0% (0%)
Other	3% (2%)	3% (2%)	2% (3%)	3% (2%)	4% (2%)

Blue arrows indicate significantly above 2017 at 95% confidence interval

Red arrows indicate significantly below 2017 at 95% confidence interval

\*Data in parentheses is 2017 tracked data

# MODAL BREAKDOWN – TRACKING (2 OF 2)

PHONE & ONLINE (COMBO)\*

2018 vs 2017

Modal Breakdown by Survey Zone Residence	All NYC Trips (n=6,063)	Inner Queens Trips (n=519)	Middle Queens Trips (n=520)	Outer Queens Trips (n=1,094)	Southern Bronx Trips (n=633)	Northern Bronx Trips (n=653)	Staten Island Trips (n=489)
Trip Duration (min.)	34.2	36.1	28.9	32.1	34.4	37.6	30.7
Walk	31% (28%)	41% (32%)	30% (24%)	18% (18%)	33% (31%)	31% (19%)	11% (6%)
Car	30% (32%)	18% (30%)	36% (37%)	53% (47%)	18% (24%)	26% (33%)	67% (75%)
Subway	21% (23%)	30% (24%)	18% (28%)	10% (21%)	22% (25%)	21% (20%)	3% (2%)
Bus	12% (8%)	5% (3%)	8% (3%)	12% (7%)	22% (17%)	14% (18%)	12% (10%)
For-Hire Vehicle	2% (3%)	1% (3%)	2% (1%)	2% (2%)	3% (1%)	3% (1%)	1% (3%)
Bike	1% (3%)	2% (2%)	3% (4%)	0% (2%)	0% (1%)	0% (2%)	0% (0%)
Commuter Rail	0% (0%)	0% (0%)	0% (1%)	0% (3%)	0% (0%)	0% (0%)	0% (0%)
Ferry	0% (0%)	0% (0%)	0% (0%)	0% (0%)	0% (0%)	0% (0%)	2% (3%)
Other	3% (2%)	2% (7%)	4% (2%)	5% (1%)	2% (0%)	4% (6%)	4% (0%)

Blue arrows indicate significantly above 2017 at 95% confidence interval

Red arrows indicate significantly below 2017 at 95% confidence interval

\*Data in parentheses is 2017 tracked data

# MODAL CHOICE BY TRIP PURPOSE

## PHONE

Modal Breakdown	All NYC Trips (n=6,063)	Commute Trips (n=2,330)	Business Trips (n=236)	School Trips (n=406)	Shopping Trips (n=1,113)	Social/ Recreation Trips (n=1,024)	Personal Errands Trips (n=798)	Medical Trips (n=354)
Trip Duration (min.)	34.2	41.9	37.0	38.6	25.5	33.6	34.3	40.9
Walk	31%	19%	20%	35%	53%	32%	40%	14%
Car	30%	29%	29%	25%	24%	30%	31%	27%
Subway	21%	35%	22%	20%	11%	18%	15%	14%
Bus	12%	11%	15%	14%	9%	10%	10%	29%
For-Hire Vehicle	2%	2%	3%	2%	1%	4%	3%	8%
Bike	1%	1%	0%	2%	0%	3%	0%	0%
Commuter Rail	0%	0%	0%	0%	0%	0%	0%	0%
Ferry	0%	0%	0%	0%	0%	0%	0%	0%
Other	3%	3%	11%	1%	2%	1%	1%	9%

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

# THE “FIRST MILE” CONNECTIONS

## PHONE & ONLINE (COMBO)

- Nearly all “first mile” connections to transit are made via walking
- Car is the next most used mode, seeing heaviest use in Staten Island, Northern Bronx, Outer Queens and Outer Brooklyn

Connecting To Transit (based on residence zone) <i>Showing % selected</i>	All NYC Trips (n=1,995)	Manhattan Core Trips (n=281)	Northern Manhattan Trips (n=342)	Inner Brooklyn Trips (n=391)	Outer Brooklyn Trips (n=347)	Inner Queens Trips (n=185)	Middle Queens Trips (n=138)	Outer Queens Trips (n=251)	Southern Bronx Trips (n=290)	Northern Bronx Trips (n=228)	Staten Island Trips (n=87*)
Walk	96.0	98.2	99.3	98.6	93.4	95.5	98.4	86.9	96.3	92.5	91.0
For-Hire vehicle	0.6	0.4	0.0	0.3	1.5	0.9	0.0	0.9	0.7	0.4	0.0
Bicycle	0.2	0.0	0.0	0.4	0.0	0.0	0.0	0.8	0.4	3.9	0.1
Car	1.3	0.0	0.1	0.8	3.9	1.9	1.9	4.3	0.9	4.4	8.9
Other	2.0	1.4	0.6	0.3	1.2	2.3	0.0	6.3	2.6	2.3	0.0

Taking another form of travel including bus, train, carpool, or getting a ride from friends/family  
(Note: small sample size)

Red circles call out unique data points

\* Indicates low base size in Staten Island, displaying unweighted percentages

# THE “LAST MILE” CONNECTIONS

## PHONE & ONLINE (COMBO)

- Nearly all “last mile” connections from transit are made via walking
- Staten Island trips are more likely than other trips to end with a mode other than walking (primarily local bus routes or friend/family pick ups)

Connecting From Transit (based on residence zone) <i>Showing % selected</i>	All NYC Trips (n=1,995)	Manhattan Core Trips (n=281)	Northern Manhattan Trips (n=342)	Inner Brooklyn Trips (n=391)	Outer Brooklyn Trips (n=347)	Inner Queens Trips (n=185)	Middle Queens Trips (n=138)	Outer Queens Trips (n=251)	Southern Bronx Trips (n=290)	Northern Bronx Trips (n=228)	Staten Island Trips (n=87*)
Walk	94.1	95.2	97.0	94.8	90.9	98.0	98.8	89.9	95.5	95.9	85.7
For-Hire vehicle	0.8	1.4	0.0	0.6	1.7	0.0	0.3	0.7	0.9	1.4	1.0
Bicycle	0.2	0.7	0.0	0.4	0.0	0.0	0.0	1.2	0.2	3.8	6.1
Car	1.0	0.3	0.7	0.8	5.0	1.3	0.0	3.0	0.5	1.4	1.0
Other	3.9	2.7	1.6	4.0	2.1	0.8	1.7	6.2	3.2	1.2	6.1

Taking another form of travel including bus, train, carpool, or getting a ride from friends/family  
(Note: small sample size)

Red circles call out unique data points

\* Indicates low base size in Staten Island, displaying unweighted percentages

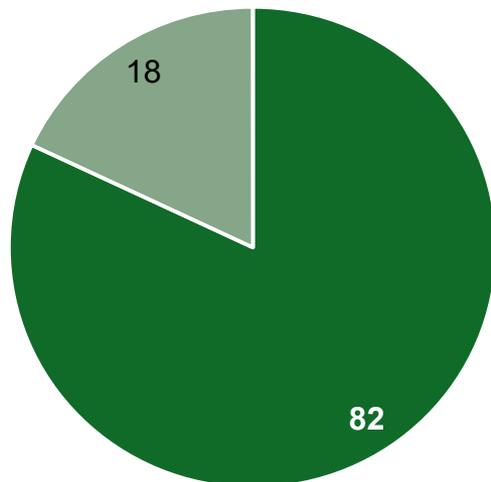
# TRIPS TAKEN – PROFILE

## PHONE ONLY

- Four in five respondents (82%) reported taking a trip the prior day
- Those who did not take a trip are significantly more likely to be lower income, disabled, or 55+

Thinking back to yesterday, did you take any trips?

■ Yes ■ No



Demographic Breakdown		All NYC (n=2,509)	Trip Takers (n=2,055)	Non-trip Takers (n=449)
Showing % of column				
Borough	Manhattan	21%	20%	24%
	Brooklyn	30%	30%	30%
	Queens	27%	28%	22%
	The Bronx	16%	16%	17%
	Staten Island	6%	6%	7%
Age	18-34	33%	35%	25%
	35-54	35%	37%	26%
	55+	32%	28%	48%
Race	White	36%	35%	37%
	Non-White	64%	65%	63%
	Hispanic	29%	29%	30%
	Non-Hispanic	71%	71%	70%
Employ. Status	Employed Full time	49%	54%	28%
	Employed Part-time	13%	13%	10%
	Unemployed	7%	6%	10%
	Other	33%	27%	49%
HH Income	Less than \$25K	26%	23%	42%
	\$25K-\$50K	20%	21%	16%
	\$50K-\$100K	27%	29%	19%
	\$100K-\$150K	16%	17%	11%
	\$150K+	6%	6%	6%
	Any disability	16%	12%	30%
	No disability	84%	88%	70%

Green boxes indicate significantly above All NYC at 95% confidence interval  
 Red boxes indicate significantly below All NYC at 95% confidence interval

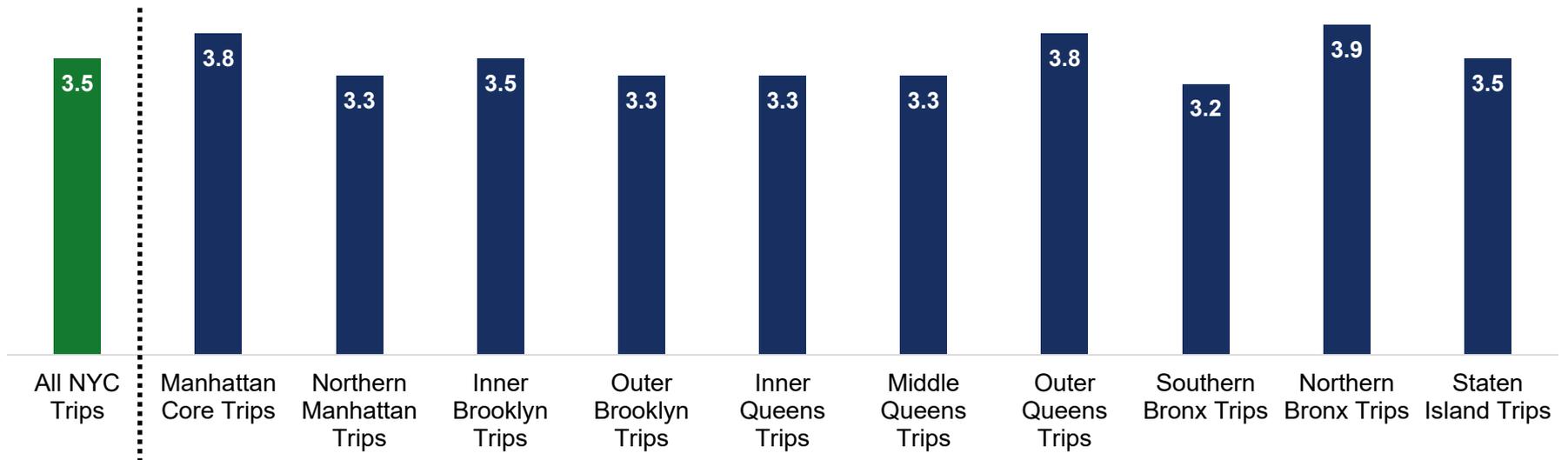
# NUMBER OF TRIPS

## PHONE & ONLINE (COMBO)

- New York trip takers report taking an average of 3.5 trips per day
- Residents in Northern Bronx, Outer Queens, and Manhattan Core report taking the most trips

### Average Number of Trips Taken

*Showing average (mean) in each survey zones*



# NUMBER OF TRIPS – WEEKDAY VS WEEKEND

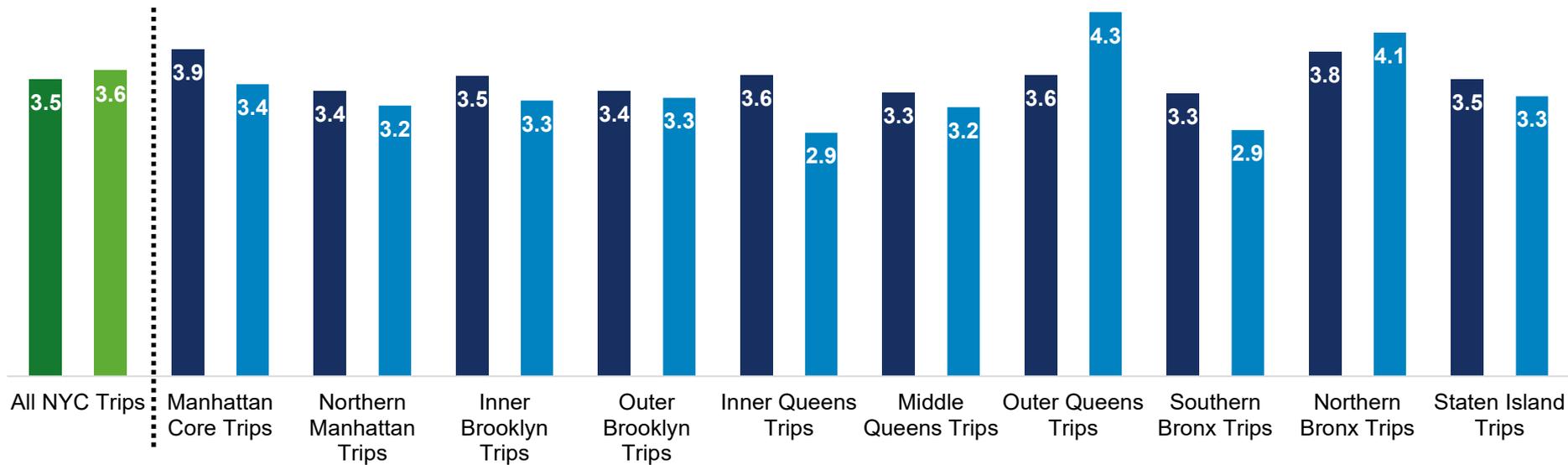
## PHONE & ONLINE (COMBO)

- New York trip takers report taking an average of 3.5 trips per day on weekdays and 3.6 trips on the weekend
- Residents in Outer Queens and Northern Bronx report taking more trips on the weekend; residents in all other zones report more trips on weekdays

### Average Number of Trips Taken

*Showing average (mean) in each survey zones*

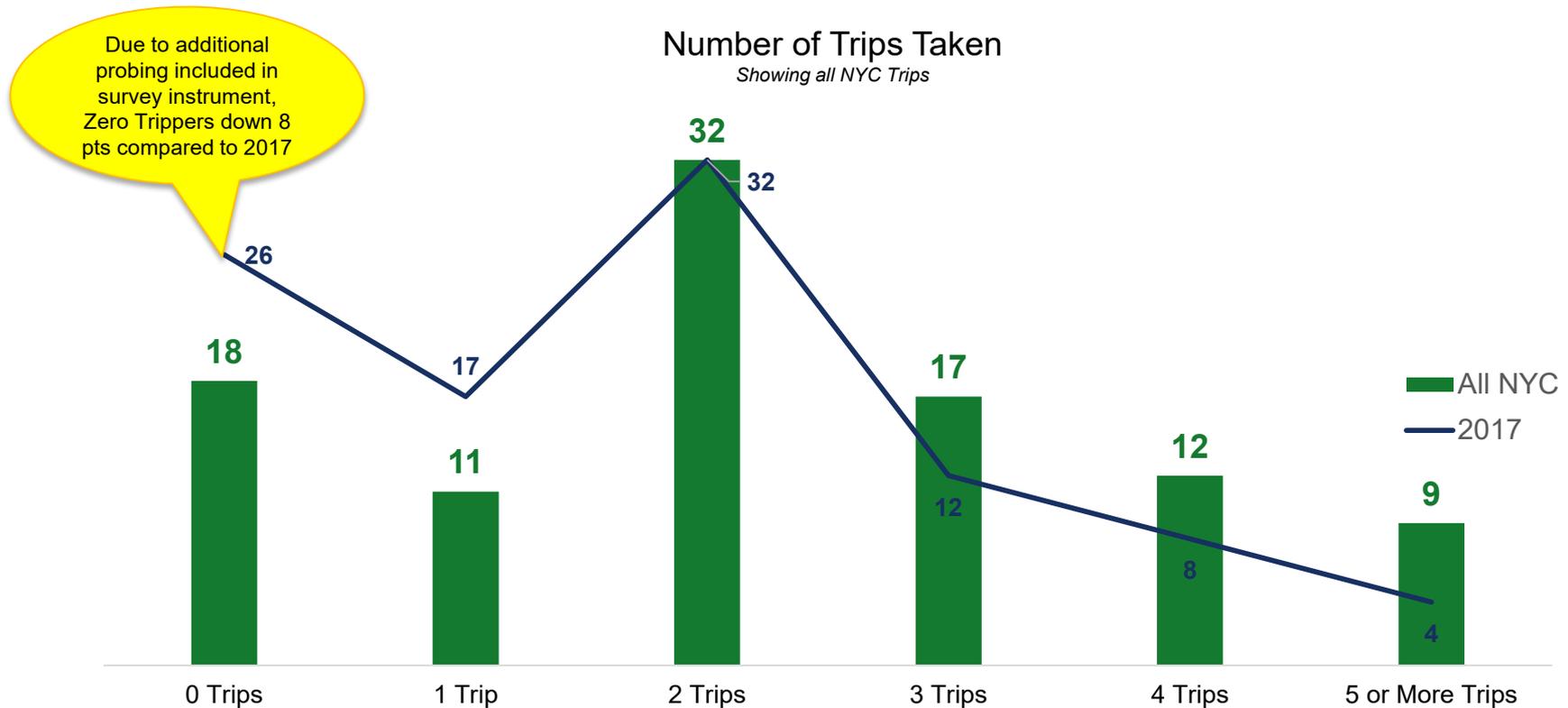
■ Weekdays    ■ Weekends



# DISTRIBUTION OF TRIPS

## PHONE ONLY

- 70% reported taking two or more trips, while 22% reported taking four or more trips
- All respondents confirmed that the destination of their last trip was where they ended their day
- All respondents who took 0 trips confirmed they did not leave their residence that day



# COMMUTE VS. NON-COMMUTE TRIPS

## PHONE ONLY

- Commute trips are much more likely to involve the subway, and less likely to include walking than non-commute trips
- Commute trips are also 10.7 minutes longer on average than non-commute trips

Trip Key Metrics <i>Showing % of column</i>		All NYC Trips (n=6,063)	Commute Trips (n=1,958)	Non-Commute Trips (n=3,833)
Trip Mode	Walk	31%	19%	35%
	Car	30%	30%	30%
	Subway	21%	33%	15%
	Bus	12%	12%	12%
	For Hire Vehicle	2%	2%	3%
	Bike	1%	1%	1%
Start Borough	Manhattan	34%	39%	31%
	Brooklyn	25%	25%	24%
	Queens	19%	15%	22%
	The Bronx	11%	11%	12%
	Staten Island	5%	5%	4%
	Outside NYC	5%	4%	5%
End Borough	Manhattan	32%	42%	27%
	Brooklyn	26%	24%	26%
	Queens	20%	15%	22%
	The Bronx	12%	10%	14%
	Staten Island	5%	5%	5%
	Outside NYC	4%	4%	5%
Avg. Trip Length (mins)		34.2	41.9	31.2

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

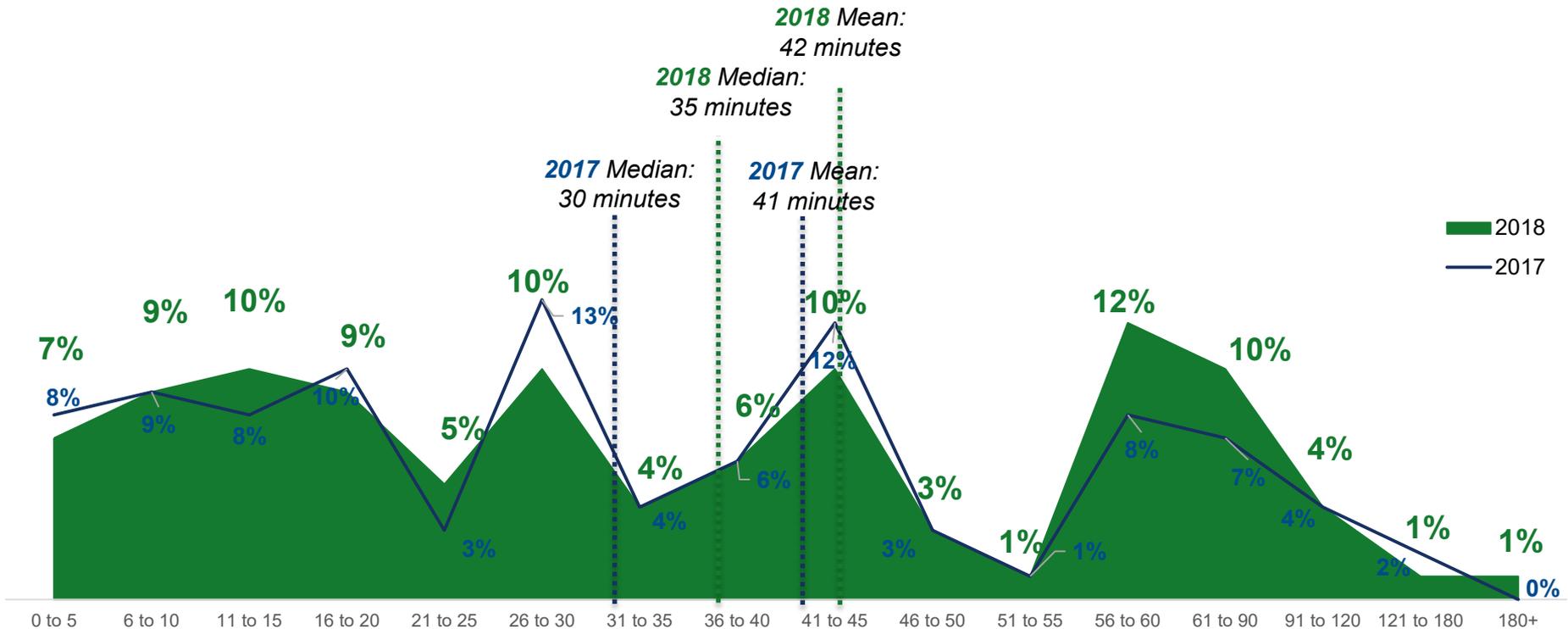
# COMMUTE TRIP DURATION

## PHONE ONLY

- An average commute trip lasts 42 minutes, in-line with last year (41)
- Commute trips last longer than the overall trip average (34)

How long did it take you to get to your destination?

Showing Commute trips



# MANHATTAN VS. NON-MANHATTAN TRIPS

## PHONE ONLY

- Trips ending in Manhattan are less likely to be by car (11% compared to 30% citywide)
- Trips ending in Manhattan have an 83% sustainable mode share

	All NYC Trips (n = 6,063)	Trips Ending in Manhattan (n = 1,279)	Trips Ending in Outer Boroughs (n = 3,685)
Walk	31%	37%	30%
Car	30%	11%	35%
Subway	21%	35%	16%
Bus	12%	10%	13%
For-Hire Vehicle	3%	4%	2%
Bike	1%	1%	1%

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# New Transportation Options

(Respondent Level Data)

3

# RIDE HAILING APPS

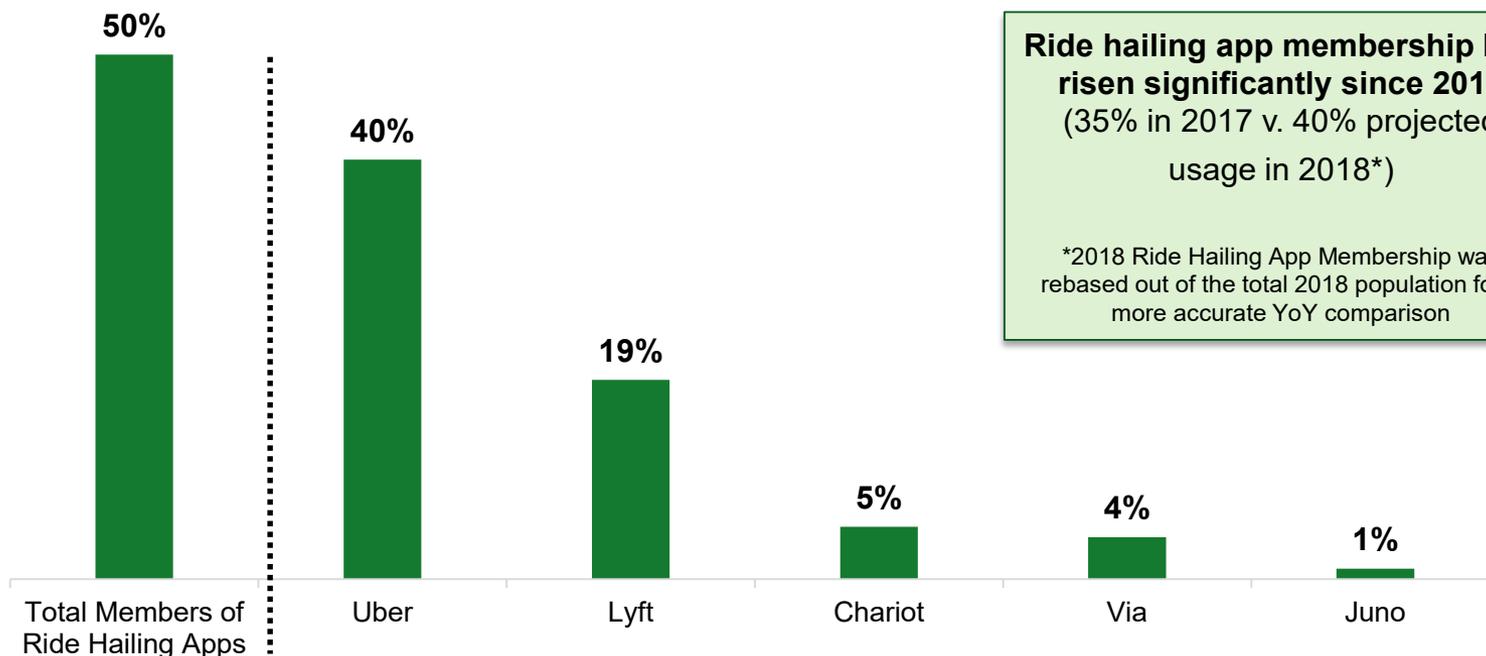
## PHONE ONLY

Displaying  
Re-Contact  
Data

- Of the 78% of New Yorkers who own a smartphone, 50% are members of ride hailing apps

### Ride Hailing App Membership

Among smartphone owners (n=1,969)



*\*NOTE: Direct comparisons cannot be made to 2017 as the question was asked differently*

# RIDE HAILING APP MEMBERSHIP

## PHONE & ONLINE (COMBO)

- Uber is the most popular app among all survey zones (40%), seeing higher use among Manhattan Core (57%) and Inner Queens (55%) residents
- Lyft sees much higher use in Inner Brooklyn (34%) and Via in Manhattan Core (17%)

Ride Hailing App Membership Among Smartphone Owners	All NYC n=1,969	Manhattan Core n=251	Northern Manhattan n=213	Inner Brooklyn n=275	Outer Brooklyn n=339	Inner Queens n=136	Middle Queens n=132	Outer Queens n=313	Southern Bronx n=162	Northern Bronx n=171	Staten Island n=147
Overall Use	50%	73%	46%	61%	48%	64%	50%	39%	45%	47%	39%
Uber	40%	57%	36%	46%	38%	55%	38%	35%	40%	39%	35%
Lyft	19%	29%	21%	34%	16%	17%	24%	13%	12%	21%	10%
Chariot	5%	8%	3%	5%	5%	3%	4%	3%	2%	4%	1%
Via	4%	17%	7%	2%	2%	2%	5%	1%	0%	2%	1%
Juno	1%	1%	2%	0%	1%	4%	2%	1%	1%	0%	1%

Green boxes indicate +10pts above All NYC

\*NOTE: There was a modal bias on multi-punch questions where respondents were more likely to select more than one choice online versus over the phone. While overall distribution of results remains the same, there is a 5-10 point increase per answer choice when looking at the online data versus the phone data.

\*NOTE: Direct comparisons cannot be made to 2017 as the question was asked differently

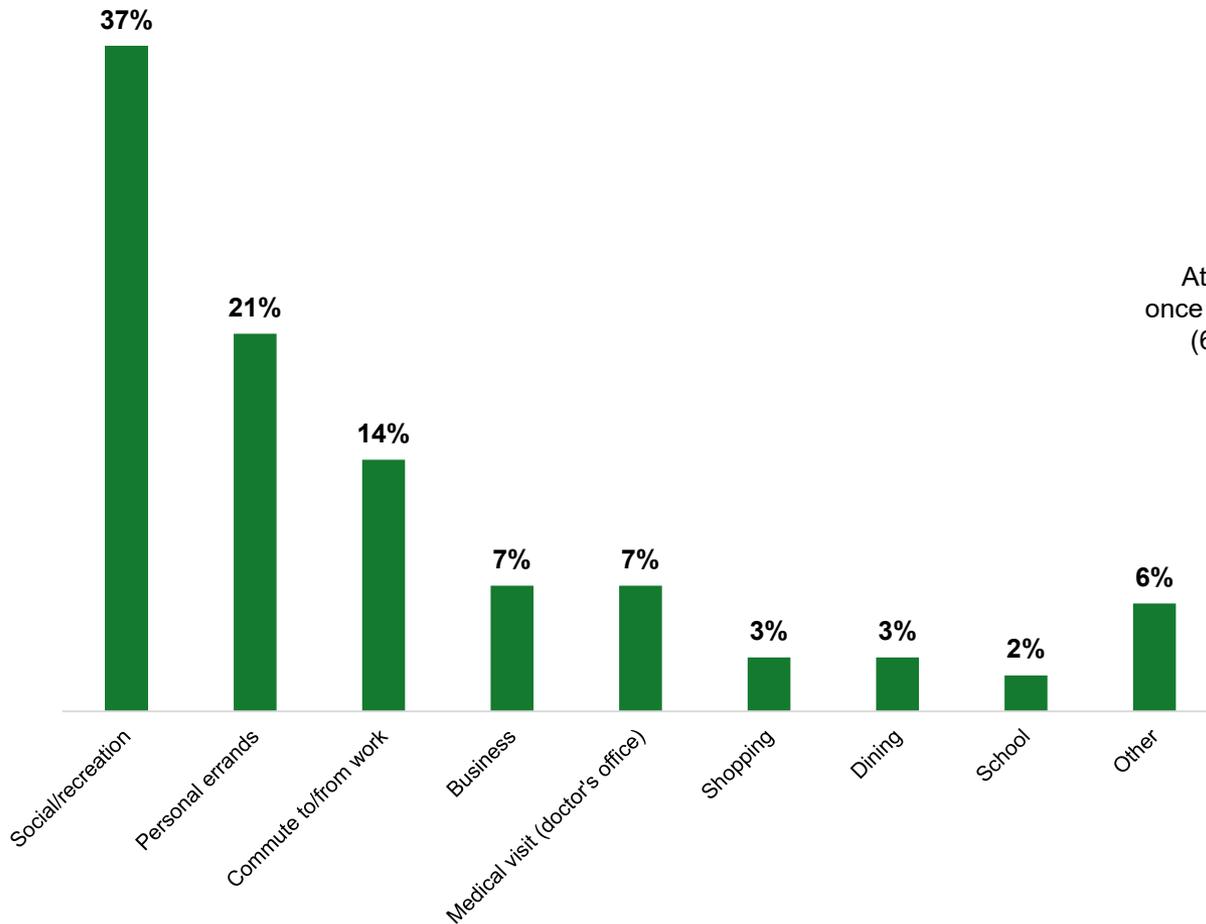
# TRIP PURPOSE – RIDE HAILING APPS

PHONE ONLY

Displaying  
Re-Contact  
Data

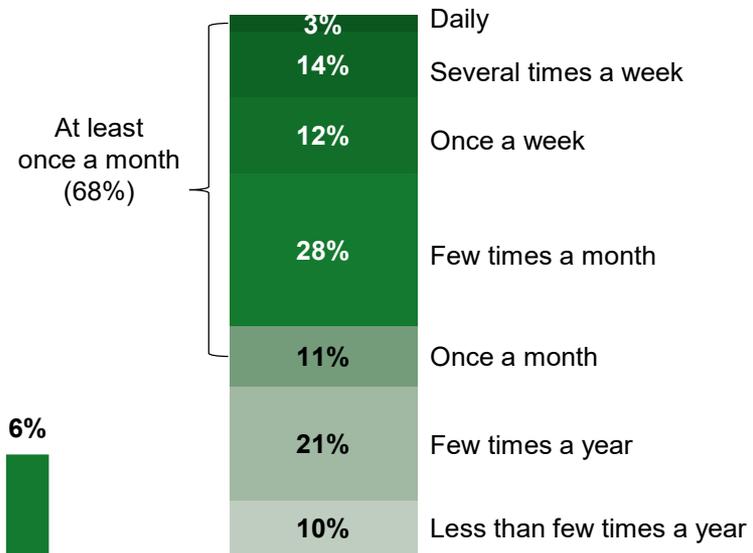
What is the most common purpose of your ride-hail trips?

Among ride hail app users (n=985)



How frequently do you use ride hailing apps?

Among ride hail app users (n=985)



\*NOTE: Direct comparisons cannot be made to 2017 as the questions were asked differently

# MODE REPLACEMENT - RIDE HAILING

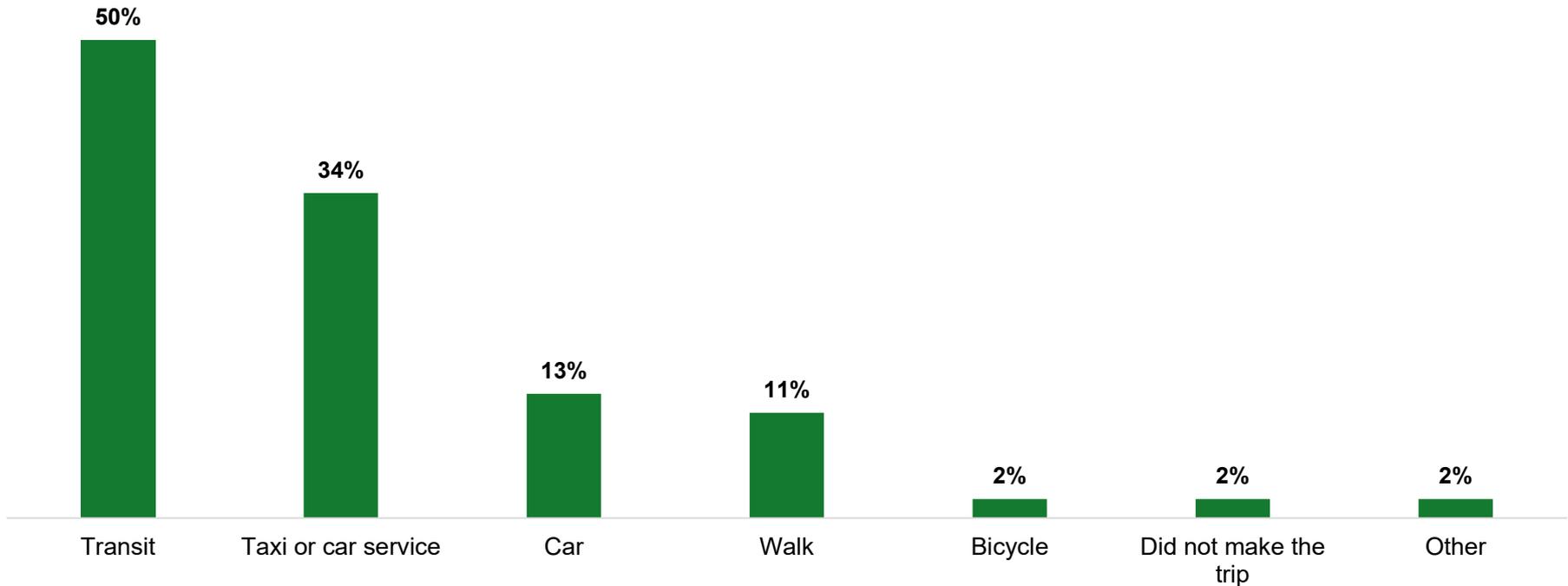
PHONE ONLY

Displaying  
Re-Contact  
Data

- Ride hailing apps are mostly replacing transit (50%) and traditional taxi (34%) services

## Mode Replacement for Ride Hailing Apps

*Among ride hail app users (n=927)*



*\*NOTE: Direct comparisons cannot be made to 2017 as the questions were asked differently*

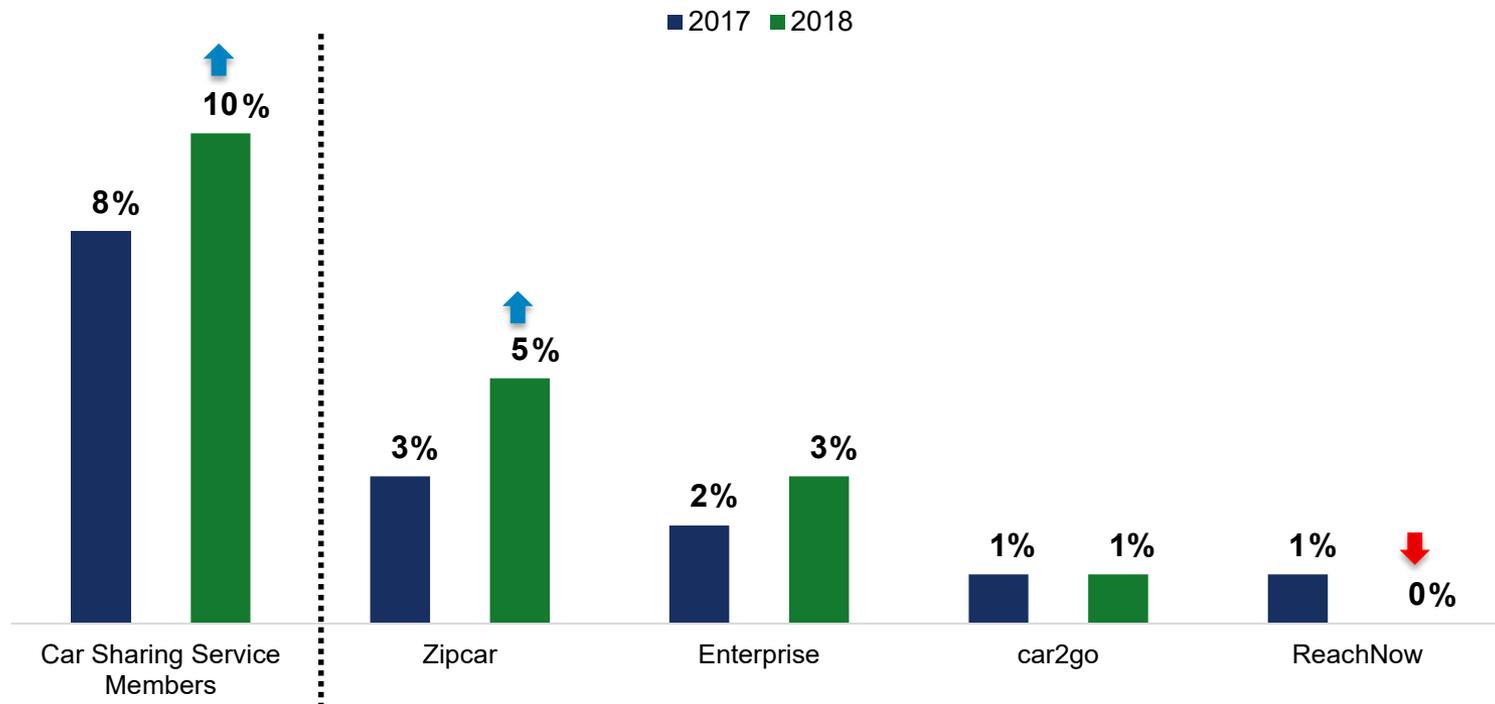
# CAR SHARING SERVICE

## PHONE ONLY

- 10% of New Yorkers participate in car sharing services, an increase from 2017
- Zipcar saw a significant uptick to 5% since 2017

### Car Sharing Service Membership

Showing All NYC (2017 n=1,801; 2018 n=2,509)



↑ Indicates significantly higher than All NYC in 2017 at 95% confidence interval  
↓ Indicates significantly lower than All NYC in 2017 at 95% confidence interval

\*Note: ReachNow left the NYC market during this time.

# CAR SHARING SERVICE MEMBERSHIP

## PHONE & ONLINE (COMBO)

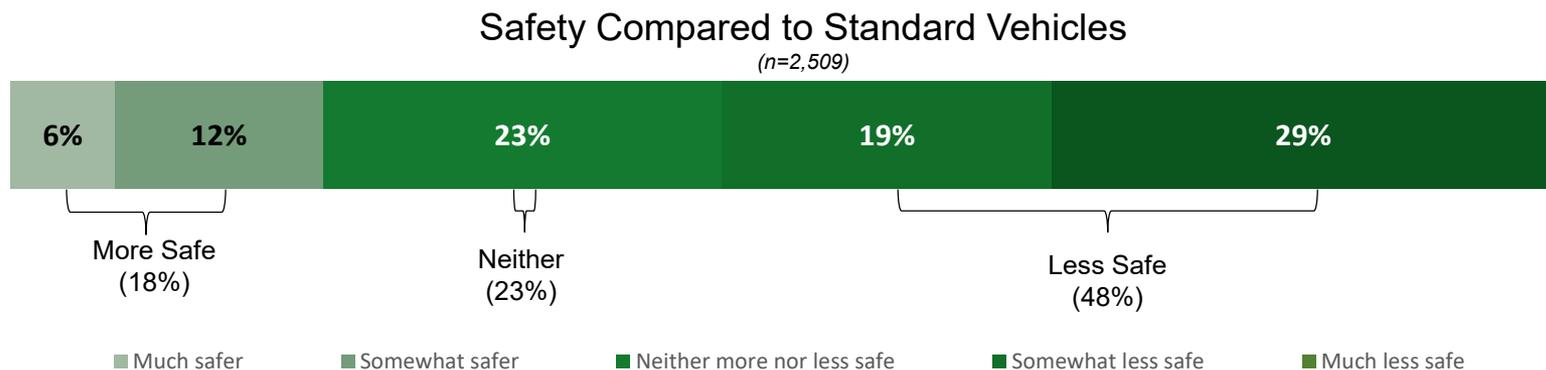
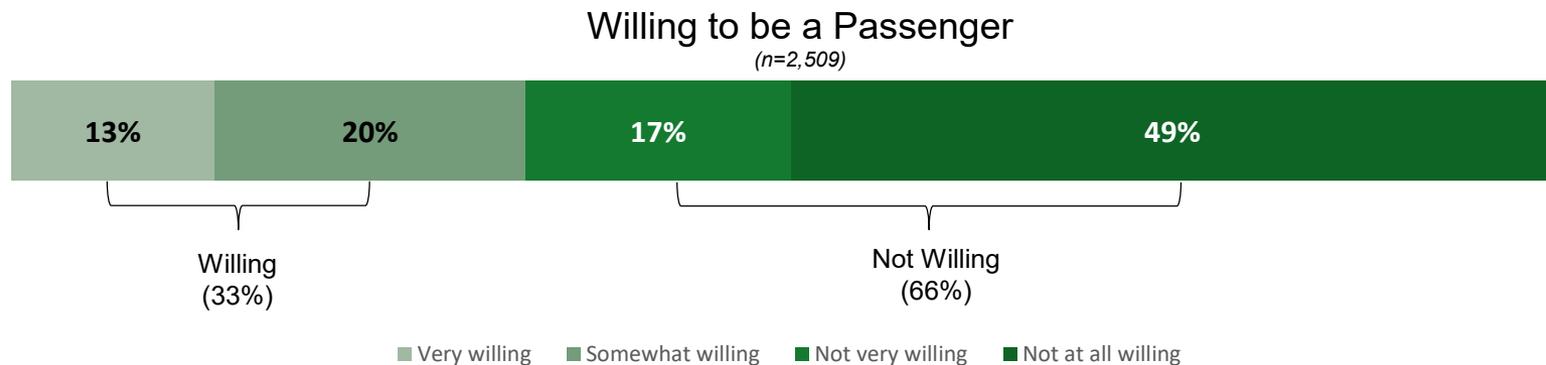
Car Sharing Service Membership	All NYC n=2,509	Manhattan Core n=341	Northern Manhattan n=332	Inner Brooklyn n=482	Outer Brooklyn n=514	Inner Queens n=210	Middle Queens n=236	Outer Queens n=432	Southern Bronx n=275	Northern Bronx n=252	Staten Island n=202
Overall	10%	16%	14%	16%	13%	17%	8%	7%	11%	10%	9%
Zipcar	5%	10%	8%	10%	5%	9%	3%	0%	2%	2%	1%
Enterprise	3%	4%	4%	4%	3%	4%	2%	3%	5%	5%	6%
car2go	1%	0%	1%	4%	3%	3%	1%	1%	0%	1%	0%
ReachNow	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%

\*NOTE: There was a modal bias on multi-punch questions where respondents were more likely to select more than one choice online versus over the phone. While overall distribution of results remains the same, there is a 5-10 point increase per answer choice when looking at the online data versus the phone data.

# AUTOMATED VEHICLES

## PHONE ONLY

- Two out of three (66%) New Yorkers would not be willing to be a passenger in an automated vehicle, with almost half (49%) not at all willing
- About half (48%) of New Yorkers feel they are less safe than a standard vehicle while 23% feel they are neither more nor less safe



\*NOTE: Direct comparisons cannot be made to 2017 as this is a new question.

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# Car Ownership & Access

(Respondent Level Data)

# 4

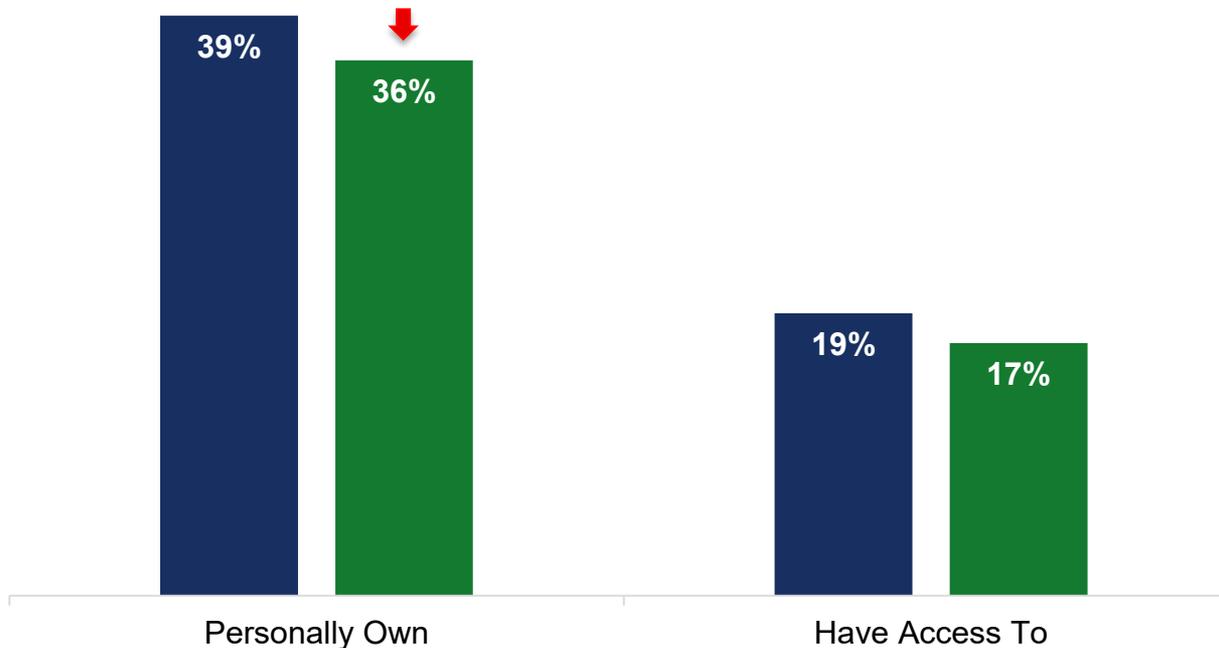
# CAR OWNERSHIP & ACCESS

PHONE ONLY

## Car Ownership and Access

(2017 n=1,801; 2018 n=2,509)

■ 2017 ■ 2018



↑ Indicates significantly higher than All NYC in 2017 at 95% confidence interval  
↓ Indicates significantly lower than All NYC in 2017 at 95% confidence interval

# CAR OWNERSHIP & ACCESS

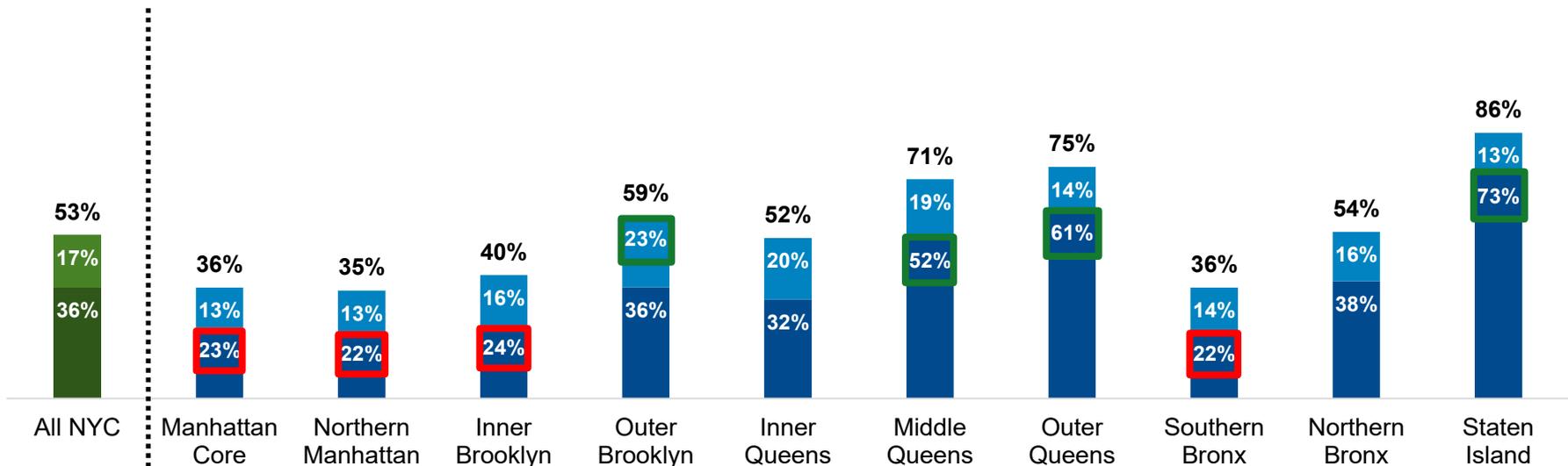
## PHONE & ONLINE (COMBO)

- Just over half (53%) of New Yorkers personally own or have access to a car
- Car ownership and access is highest in Staten Island (86%) and lowest in Northern Manhattan (35%) and Manhattan Core/Southern Bronx (36%)

### Car Ownership and Access

Among All NYC (n=2,509)

■ Currently owns / leases
 ■ Has access



   Indicates significantly higher than All NYC at 95% confidence interval  
   Indicates significantly lower than All NYC at 95% confidence interval

# PARKING BEHAVIOR

## PHONE & ONLINE (COMBO)

Parking Behavior	All NYC n=2,069	Manhattan Core n=151	Northern Manhattan n=130	Inner Brooklyn n=246	Outer Brooklyn n=454	Inner Queens n=131	Middle Queens n=259	Outer Queens n=594	Southern Bronx n=115	Northern Bronx n=185	Staten Island n=314
On the street	51%	31%	68%	63%	53%	46%	43%	50%	64%	42%	39%
In a single-family-home garage or driveway	25%	18%	13%	18%	23%	25%	23%	33%	5%	30%	45%
In a garage or lot in your apartment building	10%	23%	10%	8%	8%	21%	16%	6%	16%	14%	4%
In a shared driveway	6%	4%	0%	5%	12%	2%	7%	6%	2%	9%	6%
In another parking garage or lot	6%	20%	8%	2%	4%	5%	5%	2%	13%	6%	6%
Parking monthly spend (Among those who pay)	\$222 n=132	\$347 n=41	\$327 n=18	\$122 n=10	\$232 n=15	\$125 n=22	\$188 n=22	\$72 n=20	\$126 n=14	\$188 n=16	\$32 n=2

Green boxes indicate significantly above All NYC at 95% confidence interval

Grey text indicates directional data due to low base size

Red boxes indicate significantly below All NYC at 95% confidence interval

**Note:** Data for this slide are aggregated at the car level (i.e. on a car by car basis) as opposed to at the respondent level to better represent the entire car population (with up to four cars reported)

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# Bike Ownership

(Respondent Level Data)

5

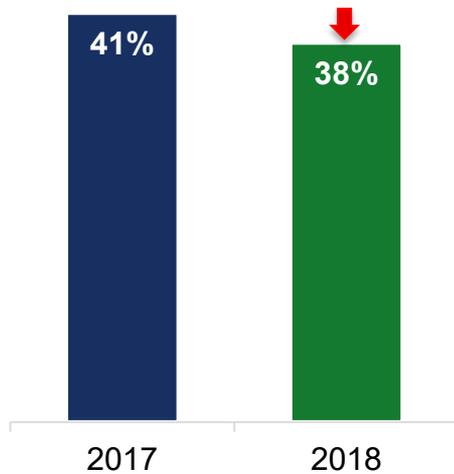
# BIKE USAGE

## PHONE ONLY

Displaying  
Re-Contact  
Data

### Bike Ownership

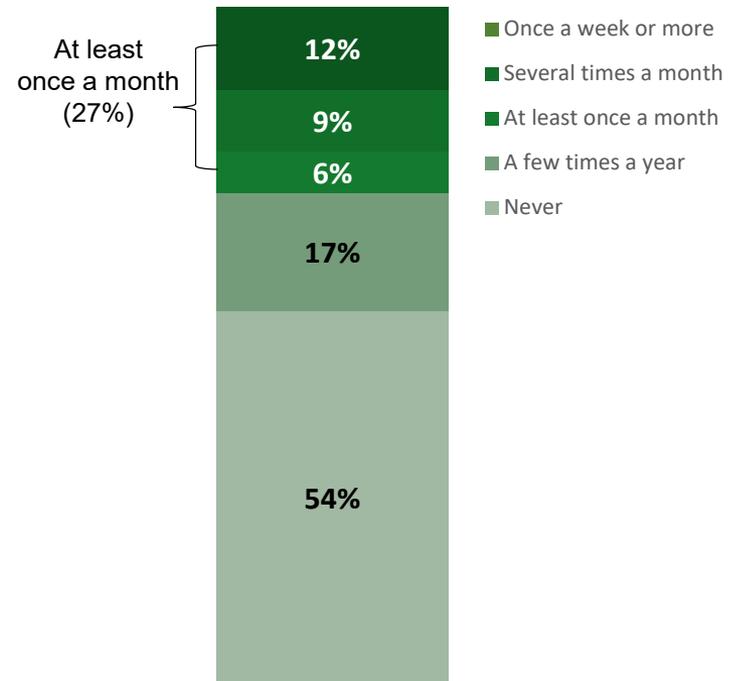
Showing All NYC (2017 n=1,801; 2018 n=2,509)



 Indicates significantly higher than All NYC in 2017 at 95% confidence interval  
 Indicates significantly lower than All NYC in 2017 at 95% confidence interval

### Bike Usage Frequency\*

Showing All NYC (n=1,344)



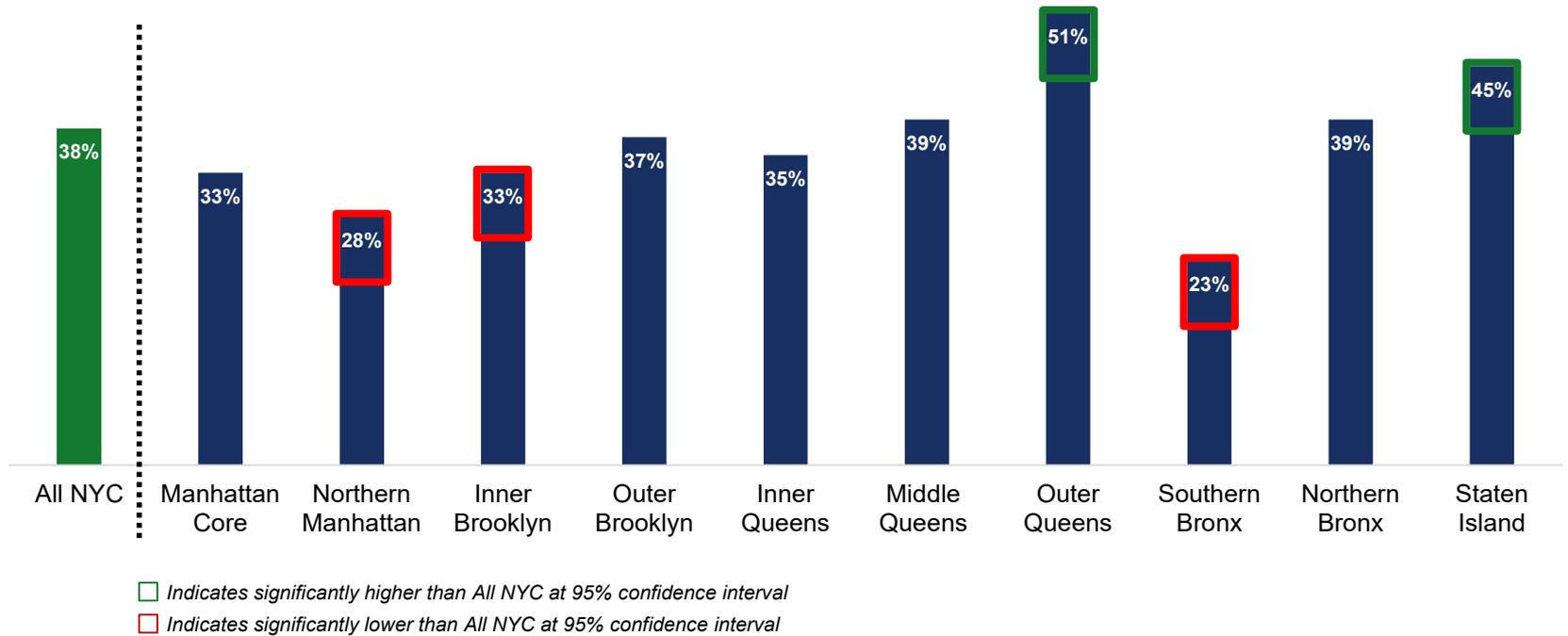
\*NOTE: This is one of the questions that used incorrect logic and required re-contacting respondents. See slide 8 for additional details.

# BIKE OWNERSHIP

## PHONE & ONLINE (COMBO)

Displaying  
Re-Contact  
Data

Bike Ownership  
Among All NYC (n=2,509)



# BIKE PURPOSE

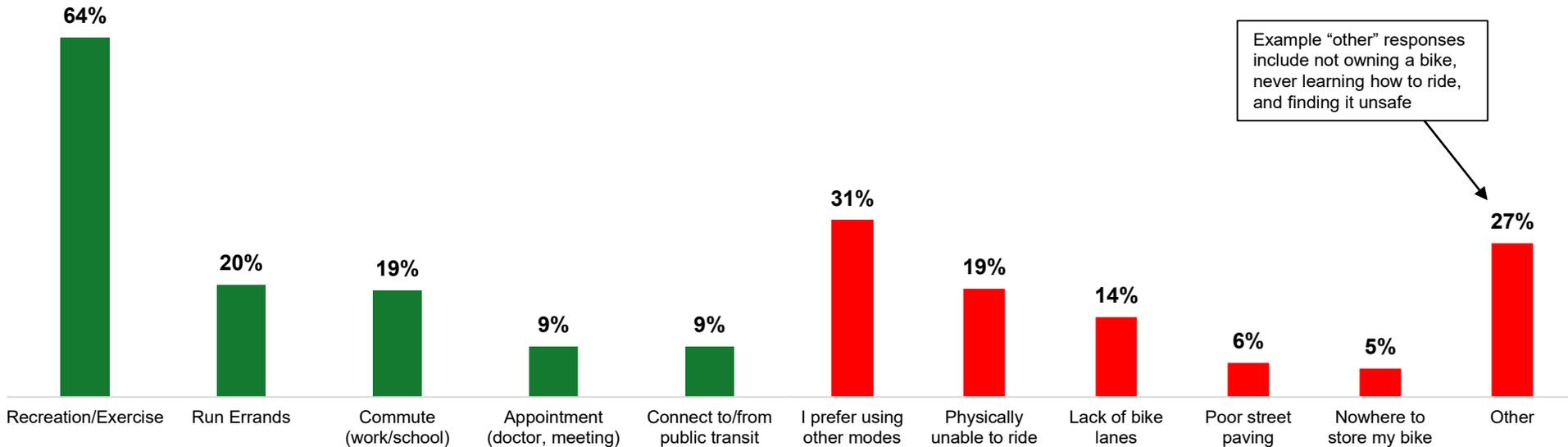
## PHONE ONLY

Displaying  
Re-Contact  
Data

- Among those who ride a bike at least once a month, their main reason for riding is overwhelmingly for recreational purposes and/or exercise (64%)
- Among those who rarely (if ever) ride a bike, the main reason they don't ride is because they prefer using other modes of transportation (31%)

### Why Do You Ride?

Among those who ride a bike at least once a month or more (n=357)



Example "other" responses include not owning a bike, never learning how to ride, and finding it unsafe

\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

# BIKE STORAGE

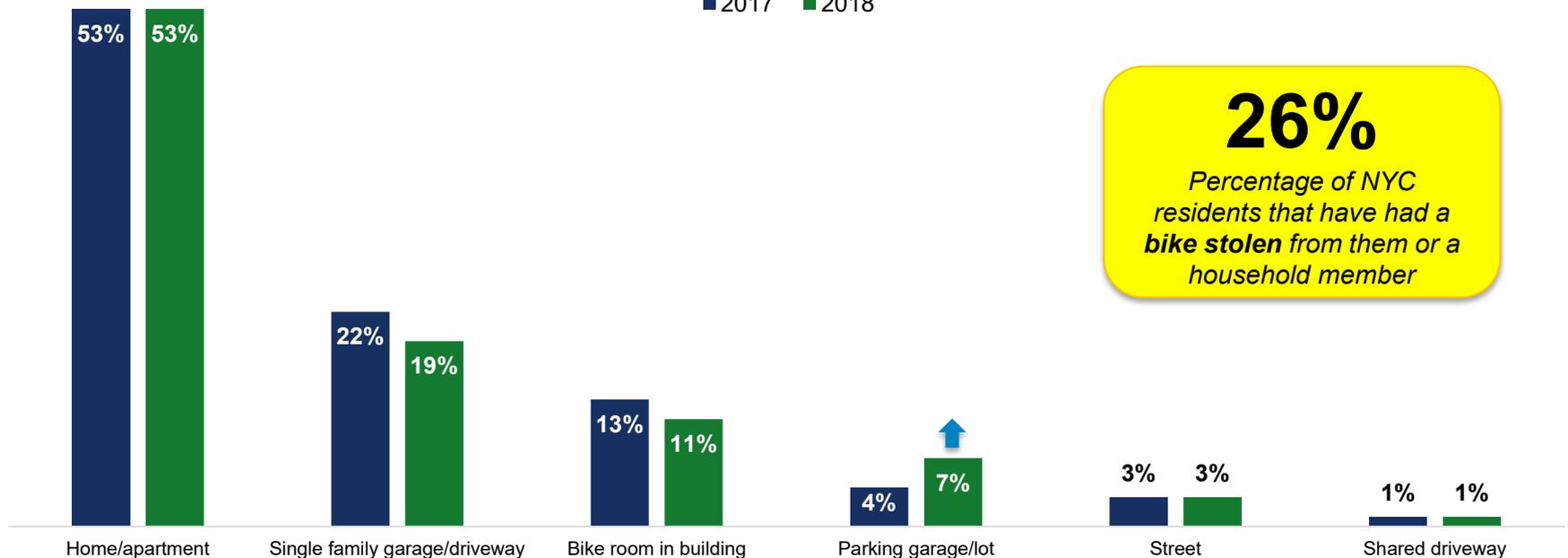
## PHONE ONLY

- For those who own a bike, the most frequent place to store that bike is inside their home or apartment (53%)
- Of note, 26% of all NYC residents say they have had a bike stolen from them or a household member

### Bike Storage

Among those who own a bike (2017 n=742; 2018 n=893)

■ 2017 ■ 2018



**26%**  
Percentage of NYC residents that have had a **bike stolen** from them or a household member

↑ Indicates significantly higher than All NYC in 2017 at 95% confidence interval  
↓ Indicates significantly lower than All NYC in 2017 at 95% confidence interval

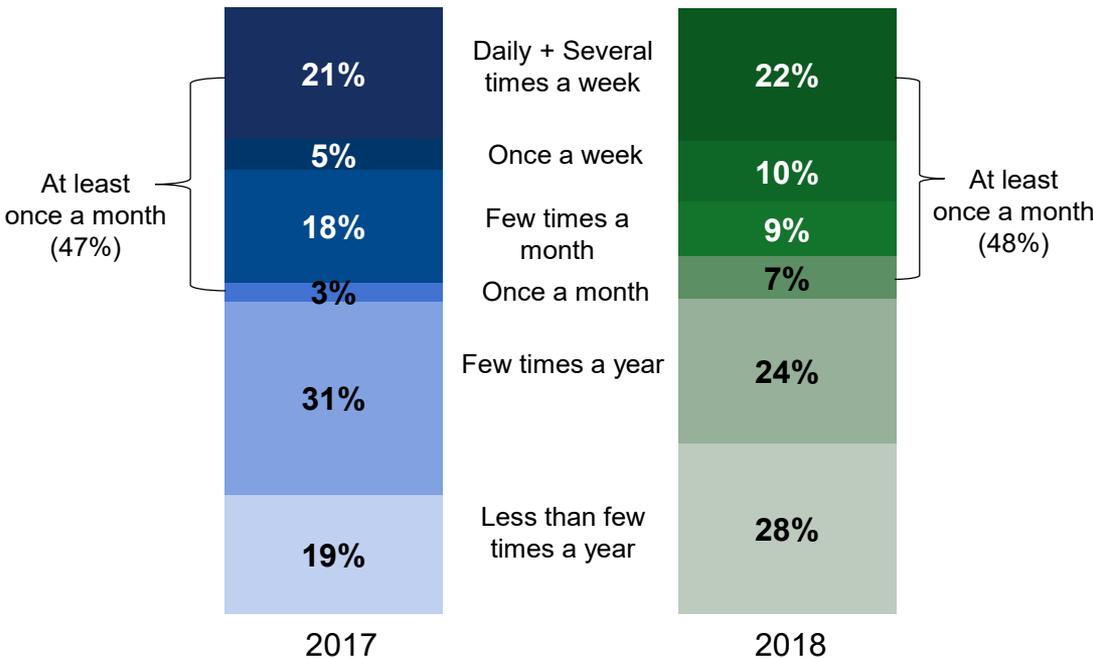
# CITI BIKE USAGE

## PHONE ONLY

4% of New Yorkers use Citi Bike

### How frequently do you use Citi Bike?

Among Citi Bike Users (2017 n=72; 2018 n=108)



Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

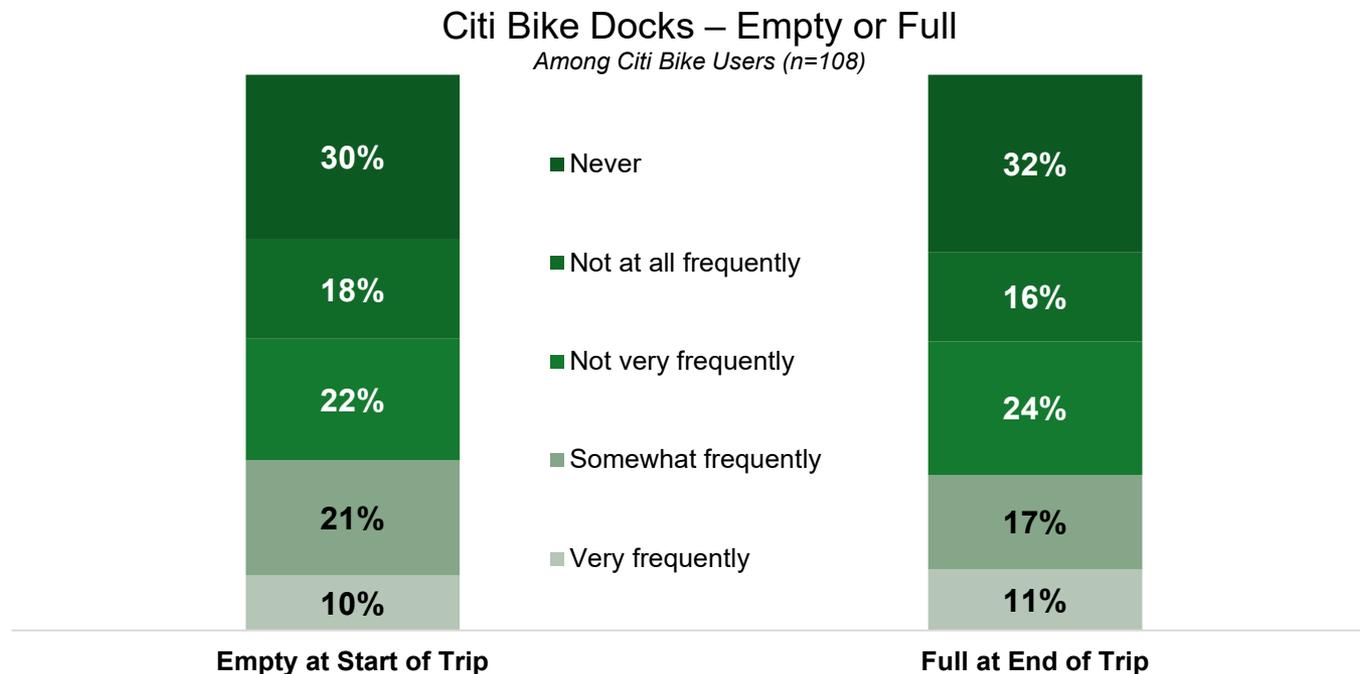
\*Note: the sample size of Citi Bike users is small

Demographic Breakdown		All NYC n=2,509	Citi Bike Users n=108
Showing % of column			
Borough	Manhattan	21%	41%
	Brooklyn	30%	23%
	Queens	27%	18%
	The Bronx	16%	13%
	Staten Island	6%	5%
Gender	Male	48%	55%
	Female	52%	45%
Age	18-24	11%	12%
	25-34	22%	32%
	35-44	18%	19%
	45-54	17%	26%
	55-64	15%	4%
	65+	17%	6%
Race	White	32%	41%
	Black	22%	15%
	Hispanic	29%	24%
	Asian	13%	17%
Employ. Status	Employed (Full)	49%	64%
	Employed (Part)	13%	9%
	Unemployed	7%	6%
	Retired	17%	6%
HH Income	Less than \$25K	26%	12%
	\$25K-\$50K	20%	18%
	\$50K-\$100K	27%	29%
	\$100K-\$150K	16%	16%
	\$150K+	6%	17%

# CITI BIKE USAGE

## PHONE ONLY

- Seven in ten Citi Bike users (70%) say they encounter empty docks at the start of their trip “not very frequently” or less often
- Similarly, nearly three quarters (72%) or more say they encounter full bike racks at the end of their trips “not very frequently” or less often



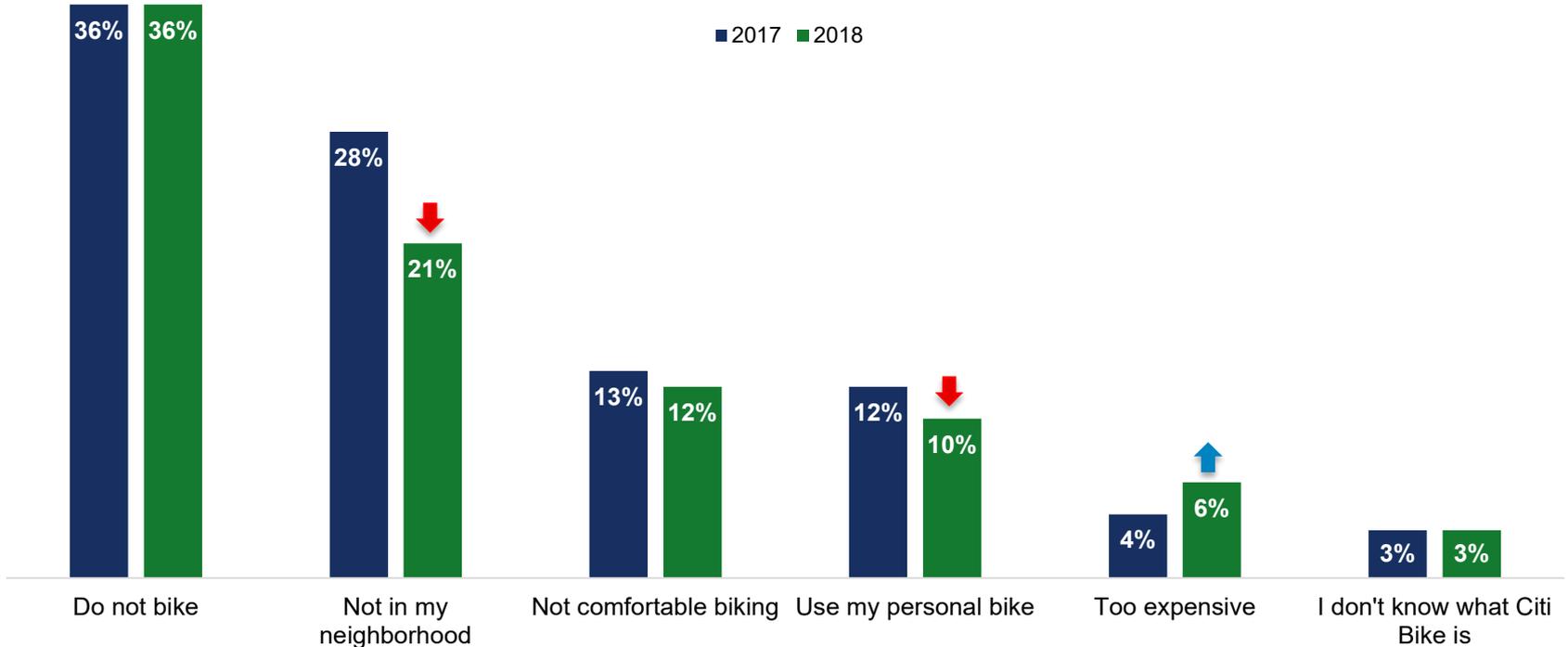
*\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question*

# CITI BIKE USAGE

## PHONE ONLY

### Why don't you use Citi Bike?

Among Non-Citi Bike Users (2017 n=1,726; 2018 n=2,354)



 Indicates significantly higher than All NYC in 2017 at 95% confidence interval  
 Indicates significantly lower than All NYC in 2017 at 95% confidence interval

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# Freight

(Respondent Level Data)

# 6

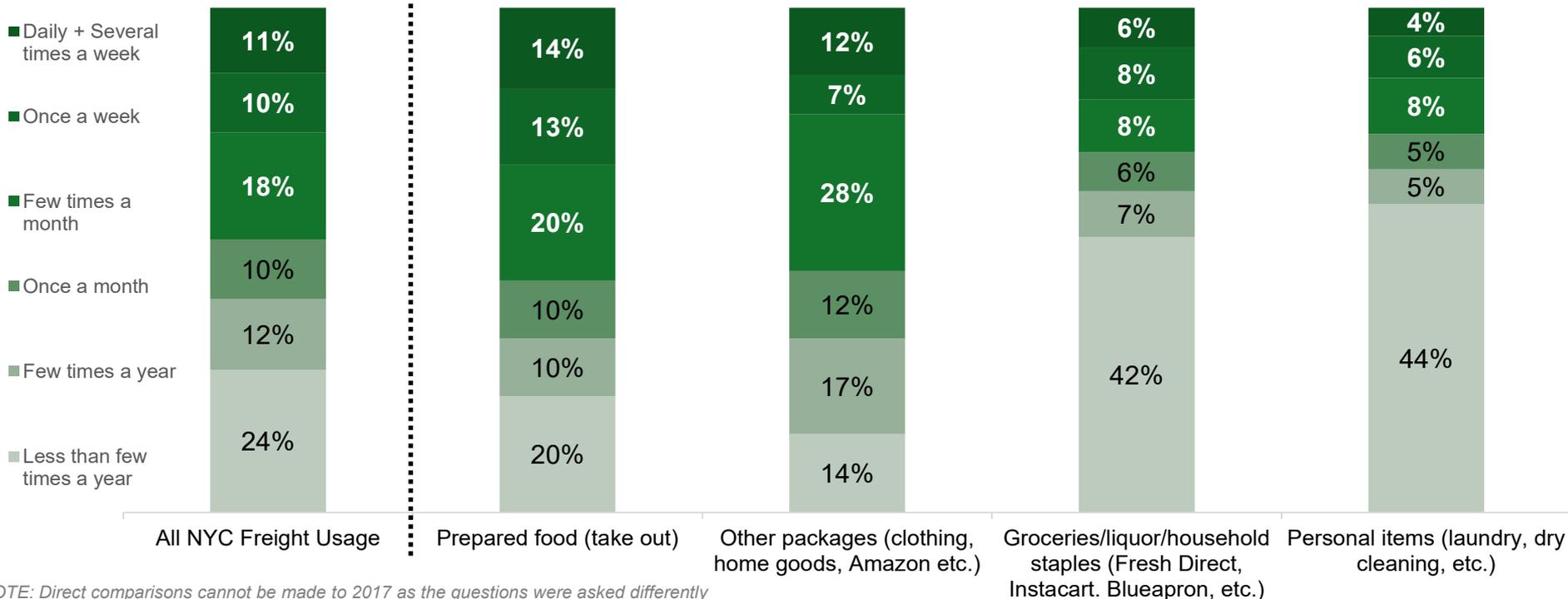
# FREIGHT USAGE

## PHONE ONLY

- The most frequently used freight options, based on several times a week, are prepared food like take out (14%) and other packages like Amazon (12%)
- Nearly half indicate they rarely receive deliveries at home for groceries or personal items like dry cleaning

### Frequency of Receiving Freight Deliveries

Among All NYC, Ranked By Top 2 Box (Daily + Several times a week)



\*NOTE: Direct comparisons cannot be made to 2017 as the questions were asked differently

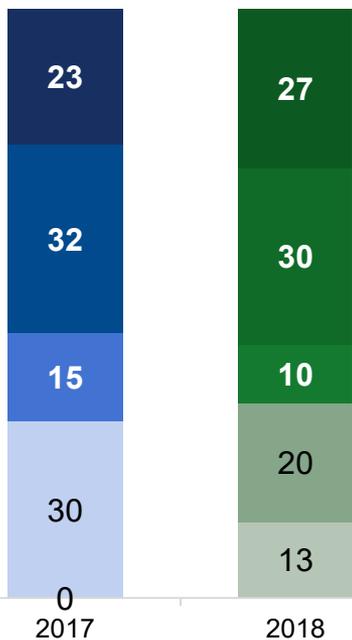
# FREIGHT USAGE TRACKING

## PHONE ONLY

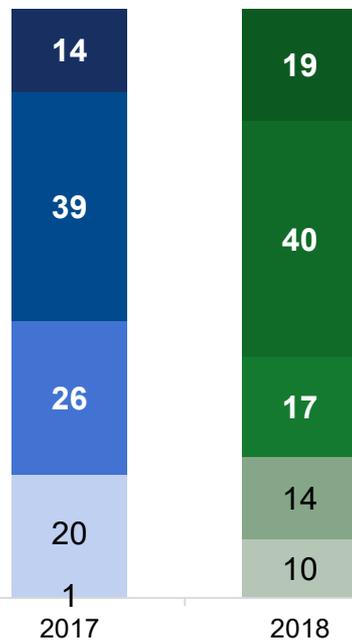
- While direct comparisons cannot be made to 2017 due to different scales, we do see slight upticks year-over-year in weekly freight usage in prepared foods and other packages

KEY					
Bucket	Weekly	Monthly	Yearly	Less	Don't Know/Refused
2017	Daily Most days Few times week	Few times month	Few times year	Never	Don't Know Refused
2018	Daily Several times week Once a week	Few times month Once month	Few times year	Less few times year	Don't Know Refused

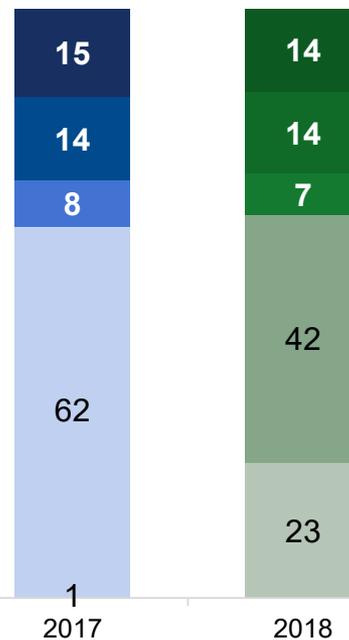
Prepared Food



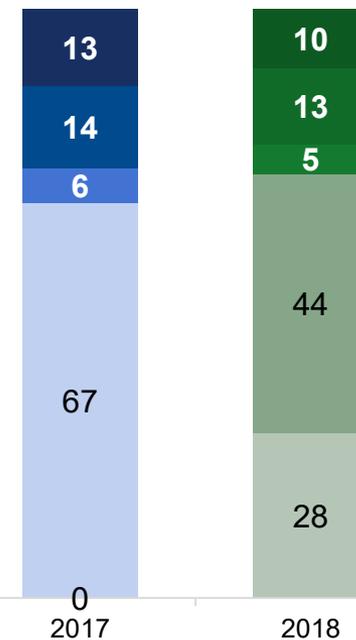
Other Packages



Groceries



Personal Items



\*NOTE: Direct comparisons cannot be made to 2017 as the questions were asked differently

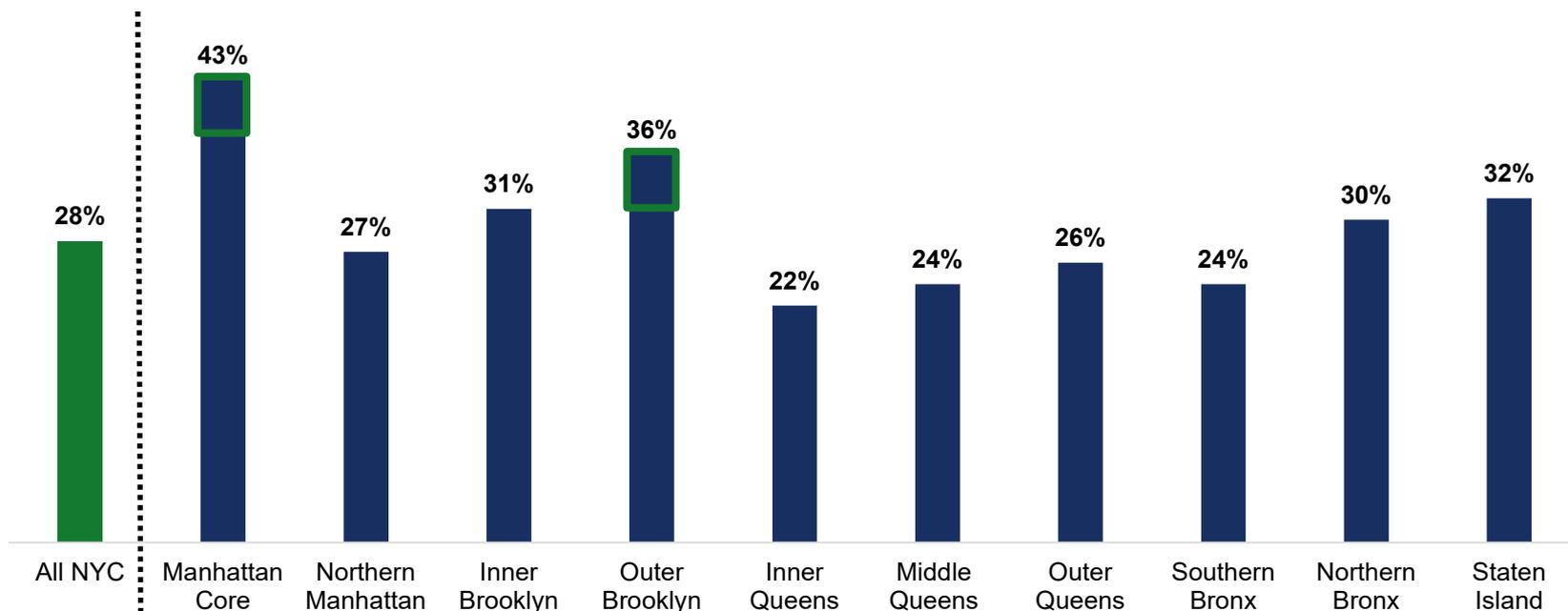
# FREIGHT USAGE – SURVEY ZONE

## PHONE & ONLINE (COMBO)

- More than one in four New Yorkers (28%) receive some kind of delivery at least several times a week
- Deliveries are significantly most common in Manhattan Core (43%) and Outer Brooklyn (36%), and least common in Inner Queens (22%) and Middle Queens/Southern Bronx (24%)

### How often do you receive deliveries at home?

Showing at Daily + Several times a week



■ Indicates significantly higher than All NYC at 95% confidence interval

■ Indicates significantly lower than All NYC at 95% confidence interval

\*NOTE: Data is combined across multiple questions to give a look at freight usage (prepared food/other deliveries/groceries/personal items)

# FREIGHT USAGE – SURVEY ZONE

## PHONE & ONLINE (COMBO)

- Manhattan Core leads among all freight deliveries, while Outer Brooklyn leads for groceries (14%) and personal items (9%)
- Northern Bronx (20%) and Staten Island (19%) also see higher levels of prepared food delivery

Freight Usage <i>Showing at Daily + Several times a week</i>	All NYC <i>n=2,509</i>	Manhattan Core <i>n=341</i>	Northern Manhattan <i>n=332</i>	Inner Brooklyn <i>n=482</i>	Outer Brooklyn <i>n=514</i>	Inner Queens <i>n=210</i>	Middle Queens <i>n=236</i>	Outer Queens <i>n=432</i>	Southern Bronx <i>n=275</i>	Northern Bronx <i>n=252</i>	Staten Island <i>n=202</i>
Prepared food	14%	25%	17%	17%	14%	11%	12%	12%	14%	20%	19%
Other packages	12%	18%	9%	10%	13%	10%	10%	11%	6%	12%	14%
Groceries / liquor / household staples	6%	9%	6%	6%	14%	5%	7%	3%	5%	6%	5%
Personal items	4%	8%	4%	5%	9%	4%	5%	6%	5%	6%	2%

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

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# State of Public Transportation

(Respondent Level Data)

*New Section Since 2017 Tracking*



# TRANSIT COMMUTER - PROFILE

## PHONE ONLY

Demographic Breakdown <i>Showing % of column</i>		All NYC <i>n=2,509</i>	Transit Commuters <i>n=764</i>	Non-Transit Commuters <i>n=679</i>
Residence Borough	Manhattan	21%	25%	17%
	Brooklyn	30%	30%	29%
	Queens	27%	24%	30%
	The Bronx	16%	19%	15%
	Staten Island	6%	4%	10%
Gender	Male	48%	50%	57%
	Female	52%	50%	43%
Age	18-24	11%	9%	9%
	25-34	22%	32%	26%
	35-44	18%	23%	23%
	45-54	17%	18%	22%
	55-64	15%	13%	15%
	65+	17%	6%	4%
Race	White	32%	28%	39%
	Black	22%	24%	21%
	Hispanic	29%	31%	25%
	Asian	13%	13%	10%
Employment Status	Employed (Full)	49%	77%	84%
	Employed (Part)	13%	23%	16%
	Unemployed	7%	0%	0%
	Retired	17%	0%	0%
HH Income	Less than \$25K	26%	19%	13%
	\$25K-\$50K	20%	21%	17%
	\$50K-\$100K	27%	30%	34%
	\$100K-\$150K	16%	17%	25%
	\$150K+	6%	8%	7%

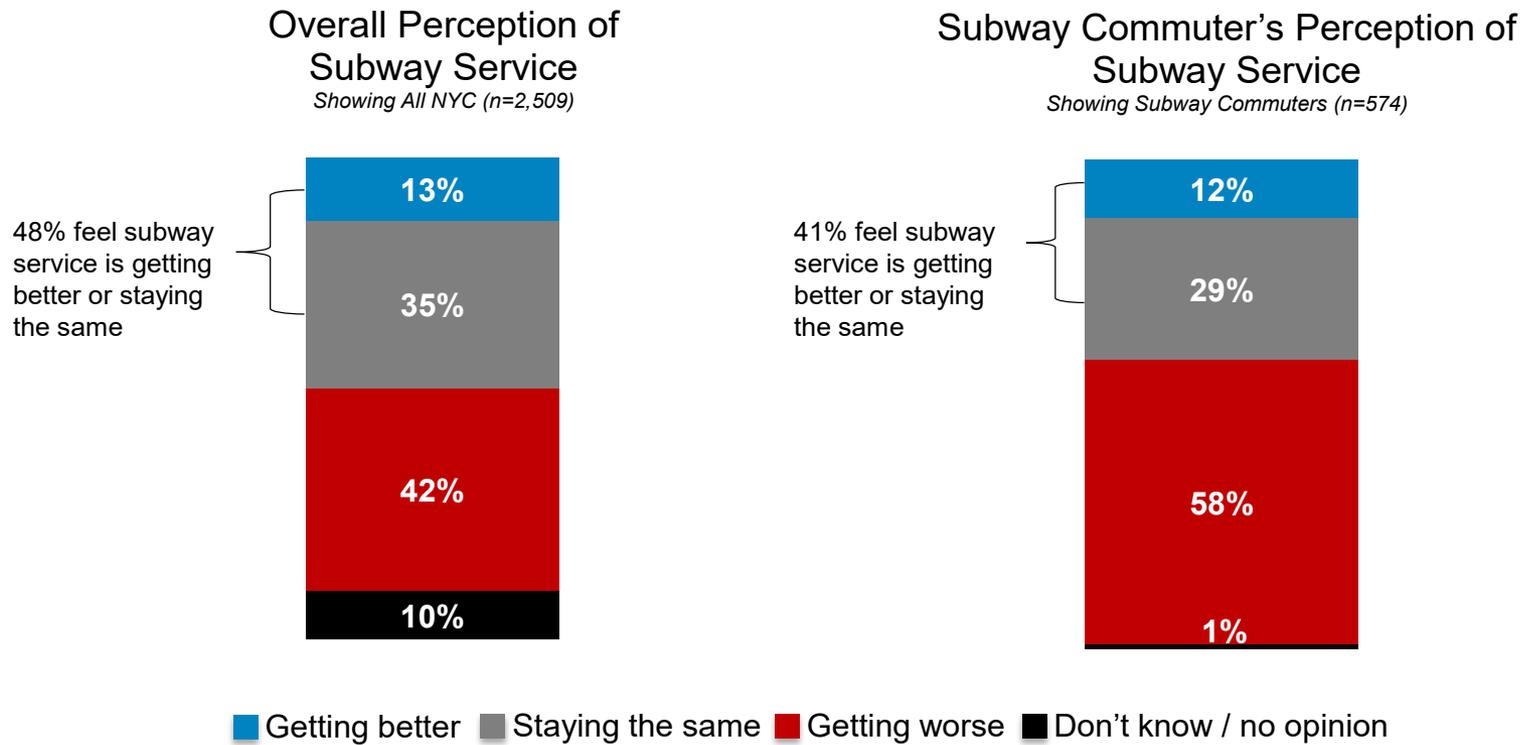
Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

# SUBWAY SERVICE – SUBWAY COMMUTERS

## PHONE ONLY

- Overall perception of the subway service among all NYC residents is split, with about half (48%) saying that the subway is either getting better (13%) or staying the same (35%), while 42% feel that it is getting worse
- Subway Commuters have a more negative perception of subway service. Over half of Subway Commuters (58%) say subway service is getting worse



\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

# SUBWAY SERVICE

## PHONE ONLY

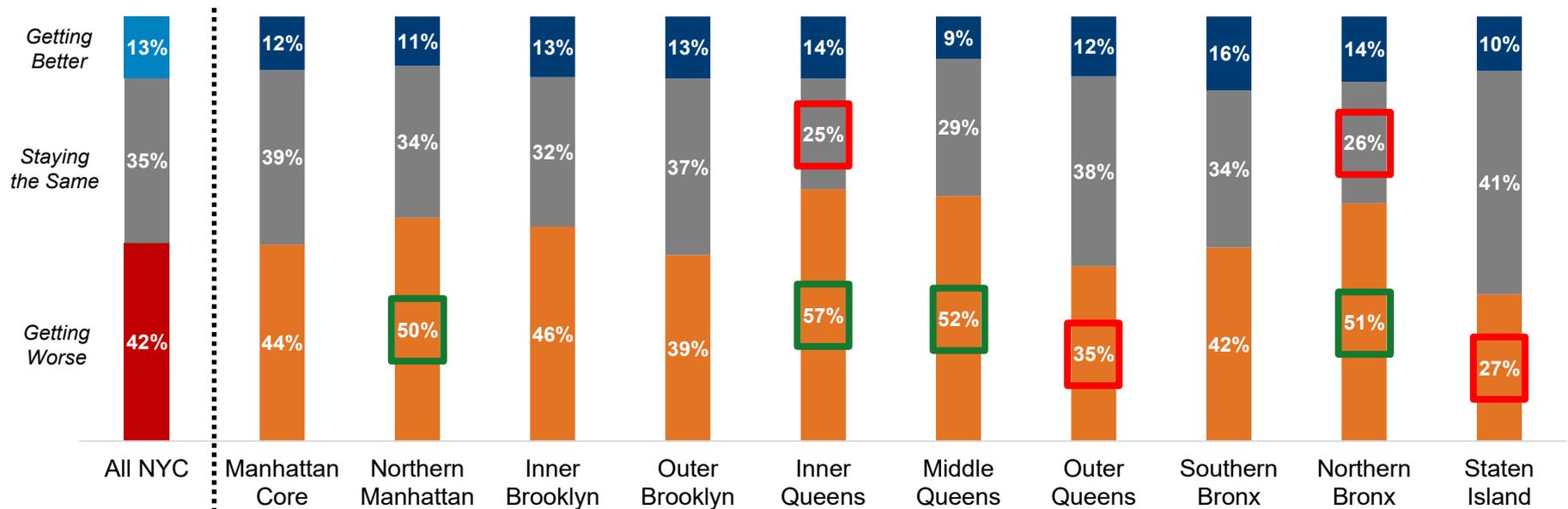
Demographic Breakdown <i>Showing % of column</i>		All NYC <i>(n=2,509)</i>	Getting Better <i>(n=319)</i>	Staying the Same <i>(n=870)</i>	Getting Worse <i>(n=1,063)</i>
Borough	Manhattan	21%	22%	22%	23%
	Brooklyn	30%	28%	32%	30%
	Queens	27%	27%	25%	27%
	The Bronx	16%	18%	14%	17%
	Staten Island	6%	4%	7%	3%
Gender	Male	48%	50%	49%	48%
	Female	52%	50%	51%	52%
Age	18-24	11%	12%	14%	10%
	25-34	22%	19%	22%	27%
	35-44	18%	18%	17%	20%
	45-54	17%	16%	17%	18%
	55-64	15%	13%	15%	15%
	65+	17%	21%	16%	11%
Race	White	32%	22%	33%	33%
	Black	22%	22%	22%	21%
	Hispanic	29%	37%	26%	30%
	Asian	13%	16%	14%	12%
Employ. Status	Employed (Full)	49%	40%	47%	57%
	Employed (Part)	13%	18%	13%	13%
	Unemployed	7%	6%	8%	6%
	Retired	17%	20%	16%	10%
HH Income	Less than \$25K	26%	38%	25%	22%
	\$25K-\$50K	20%	20%	22%	19%
	\$50K-\$100K	27%	26%	26%	30%
	\$100K-\$150K	16%	7%	17%	18%
	\$150K+	6%	4%	5%	7%

# SUBWAY SERVICE

## PHONE & ONLINE (COMBO)

- Southern Bronx residents are the most optimistic about the subway service, with 16% feeling that it is getting better
- Over half of the residents within Inner Queens (57%), Middle Queens (52%), Northern Bronx (51%) and Northern Manhattan (50%) feel that the subway service is getting worse

Perceptions of Subway Service



□ Indicates significantly higher than All NYC at 95% confidence interval

□ Indicates significantly lower than All NYC at 95% confidence interval

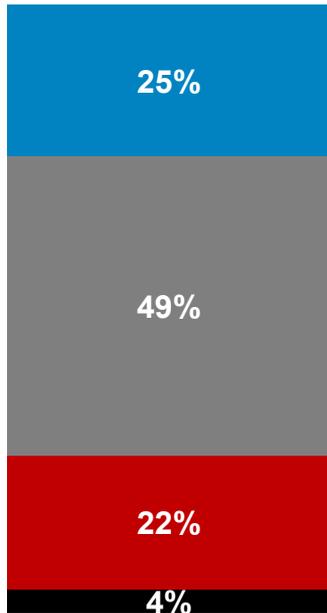
\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

# SUBWAY SERVICE

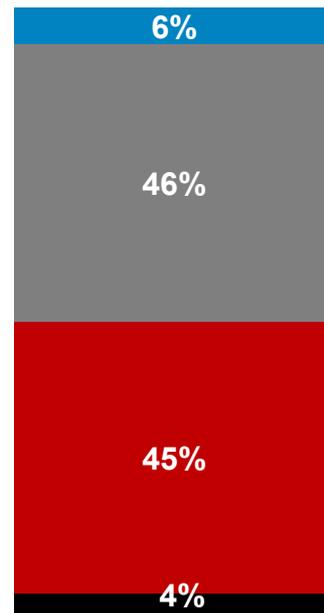
## PHONE ONLY

- Those who feel like it's getting better are more likely to use it more frequently (25%) while those who feel like it's getting worse are more likely to use it less frequently (45%)

Getting Better:  
Impact on Subway Use  
Showing those who answered Getting Better (n=319)



Getting Worse:  
Impact on Subway Use  
Showing those who answered Getting Worse (n=1,063)



■ More frequently ■ Same amount ■ Less frequently ■ Don't know / Refused

\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

# REPLACING SUBWAY SERVICE

## PHONE ONLY

- Of those who use the subway less frequently, they are instead using cars (29%) and the bus (24%) more often, while 4% no longer make the trip

Replacing Subway Transportation  
Showing those who use the subway less frequently (n=546)



\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

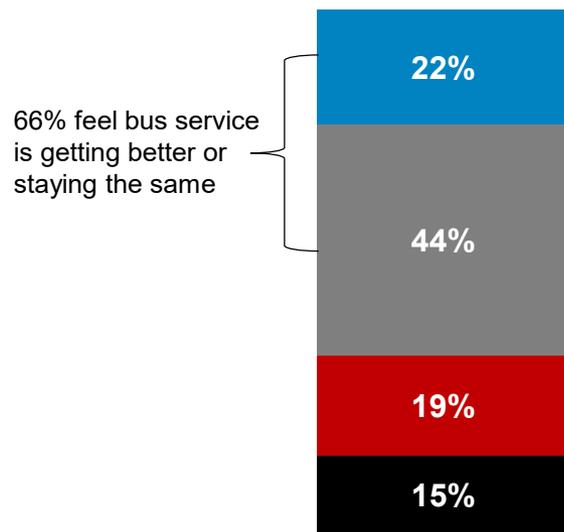
# BUS SERVICE – BUS COMMUTERS

## PHONE ONLY

- New Yorkers feel that bus service is either getting better (22%) or staying the same (44%), outweighing those who feel that it is getting worse (19%)
- Bus Commuters' perception of bus service a bit more positive than all NYC residents, with 71% feeling that bus service is either getting better (31%) or staying the same (40%)

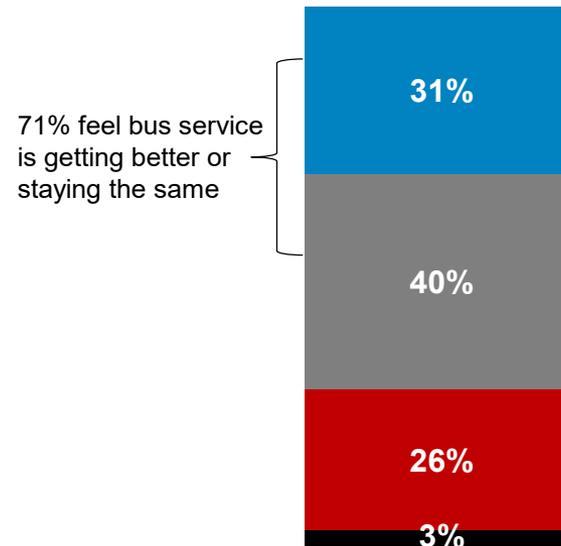
Overall Perception of Bus Service

Showing All NYC (n=2,509)



Bus Commuter's Perception of Bus Service

Showing Bus Commuters (n=263)



■ Getting better ■ Staying the same ■ Getting worse ■ Don't know / no opinion

\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

# BUS SERVICE

## PHONE ONLY

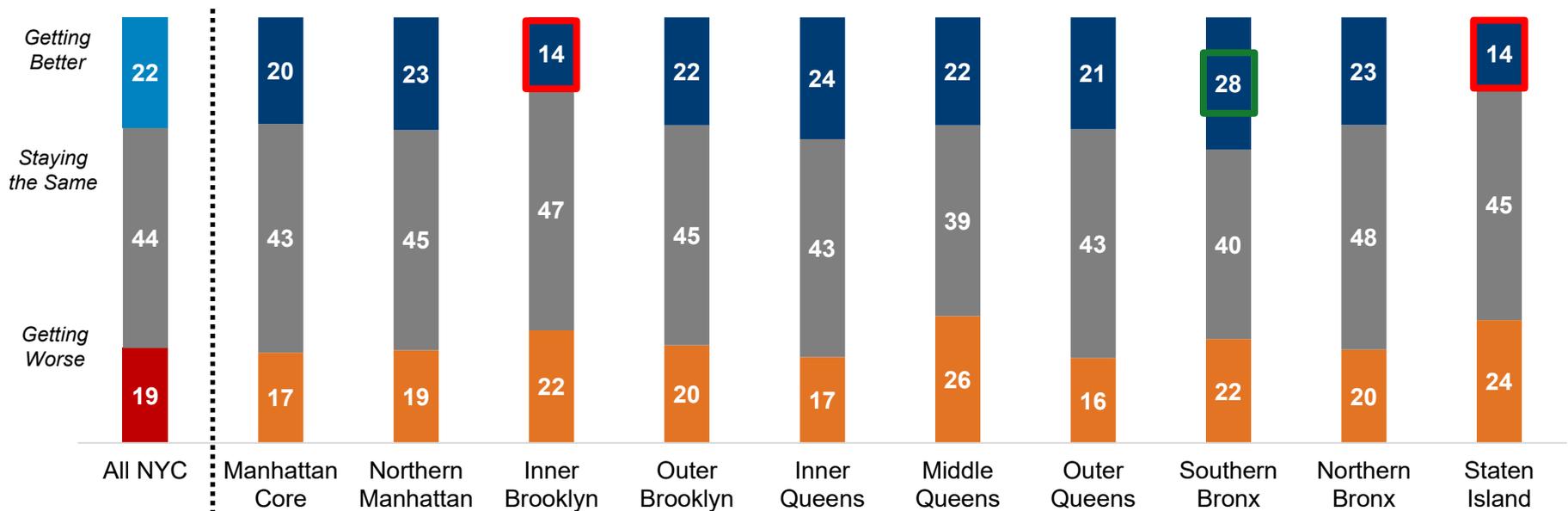
Demographic Breakdown <i>Showing % of column</i>		All NYC <i>(n=2,509)</i>	Getting Better <i>(n=554)</i>	Staying the Same <i>(n=1,095)</i>	Getting Worse <i>(n=480)</i>
Borough	Manhattan	21%	23%	21%	20%
	Brooklyn	30%	26%	32%	31%
	Queens	27%	27%	26%	26%
	The Bronx	16%	20%	15%	16%
	Staten Island	6%	4%	6%	7%
Gender	Male	48%	51%	48%	42%
	Female	52%	49%	52%	58%
Age	18-24	11%	20%	10%	6%
	25-34	22%	18%	24%	22%
	35-44	18%	20%	16%	16%
	45-54	17%	14%	17%	19%
	55-64	15%	12%	15%	19%
	65+	17%	16%	17%	17%
Race	White	32%	23%	34%	29%
	Black	22%	24%	22%	25%
	Hispanic	29%	31%	29%	34%
	Asian	13%	20%	12%	7%
Employ. Status	Employed (Full)	49%	44%	48%	51%
	Employed (Part)	13%	16%	11%	14%
	Unemployed	7%	7%	7%	7%
	Retired	17%	15%	18%	16%
HH Income	Less than \$25K	26%	28%	27%	29%
	\$25K-\$50K	20%	22%	20%	23%
	\$50K-\$100K	27%	29%	25%	26%
	\$100K-\$150K	16%	12%	17%	12%
	\$150K+	6%	5%	6%	5%

# BUS SERVICE

## PHONE & ONLINE (COMBO)

- Southern Bronx residents are the most optimistic about the bus service, with 28% feeling that it is getting better
- Middle Queens residents are among those most likely to say that bus service is getting worse (26%)

Perceptions of Bus Service



□ Indicates significantly higher than All NYC at 95% confidence interval

□ Indicates significantly lower than All NYC at 95% confidence interval

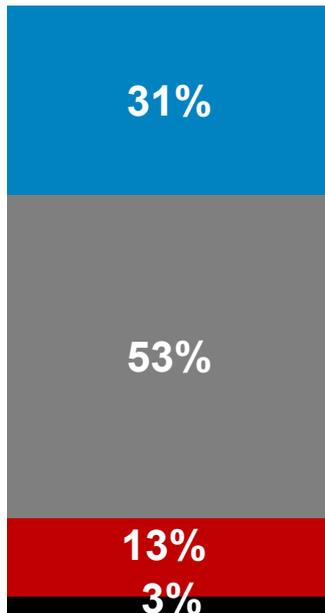
\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

# BUS SERVICE

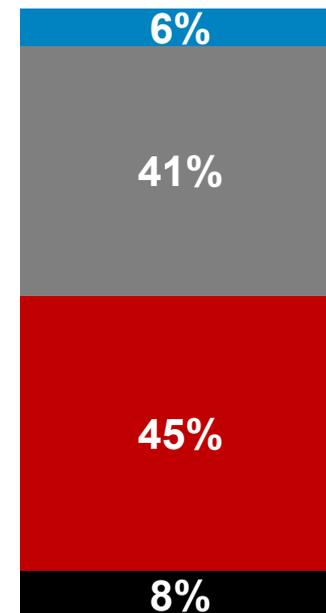
## PHONE ONLY

- Those who feel like it's getting better are more likely to use it more frequently (31%) while those who feel like it's getting worse are more likely to use it less frequently (45%)

Getting Better:  
Impact on Bus Use  
Showing those who answered Getting Better (n=554)



Getting Worse:  
Impact on Bus Use  
Showing those who answered Getting Worse (n=480)



■ More frequently ■ Same amount ■ Less frequently ■ Don't know / Refused

\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

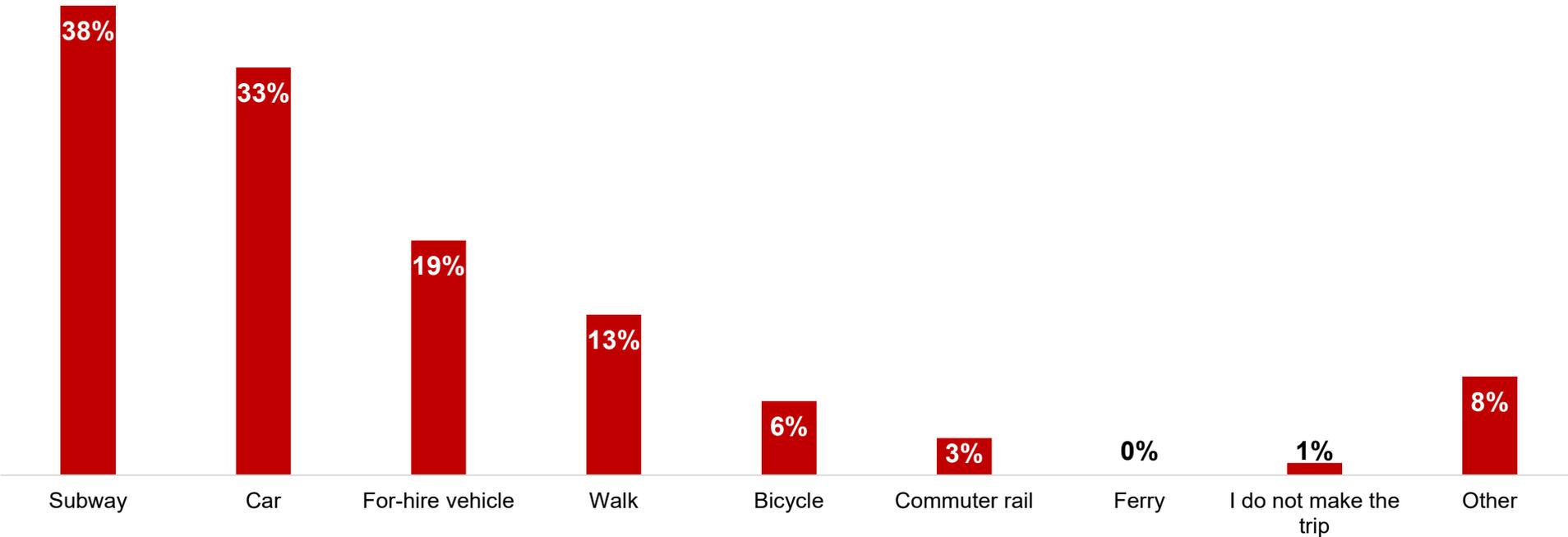
# REPLACING BUS SERVICE

## PHONE ONLY

Displaying  
Re-Contact  
Data

- Of those who use the bus less frequently, they are instead using the subway (38%), cars (33%) and for-hire vehicles (19%) more often, while only 1% no longer make the trip

Replacing Bus Transportation  
Showing those who use the bus less frequently (n=53)



\*NOTE: Direct comparisons cannot be made to 2017 as this is a newly tracked question

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## Low Income Segment

(Respondent Level Data)

*New Section Since 2017 Tracking*



# INCOME PROFILES

## PHONE ONLY

		All NYC n=2,509	Low HH Income <\$25k n=652	Middle HH Income \$25k-\$75k n=883	High HH Income \$75k+ n=848
Age	18-24	11%	14%	13%	5%
	25-34	22%	19%	25%	23%
	35-44	18%	15%	17%	22%
	45-54	17%	13%	14%	23%
	55-64	15%	13%	14%	18%
	65+	17%	27%	17%	9%
Race	White	32%	13%	26%	53%
	Black	22%	23%	28%	16%
	Hispanic	29%	49%	28%	16%
	Asian	13%	11%	14%	12%
Education	Less than HS	12%	29%	10%	0%
	HS/Some College	54%	59%	55%	21%
	College Degree or more	34%	13%	35%	68%
Employment	Employed (Full Time)	49%	19%	50%	73%
	Employed (Part Time)	13%	21%	11%	8%
	Unemployed	7%	11%	7%	2%
	Retired	17%	25%	17%	9%
Home /Borough	Manhattan	21%	21%	18%	24%
	Brooklyn	30%	32%	34%	24%
	Queens	27%	21%	27%	32%
	The Bronx	16%	24%	17%	10%
	Staten Island	6%	3%	4%	10%

Green boxes indicate significantly above All NYC at 95% confidence interval Red boxes indicate significantly below All NYC at 95% confidence interval

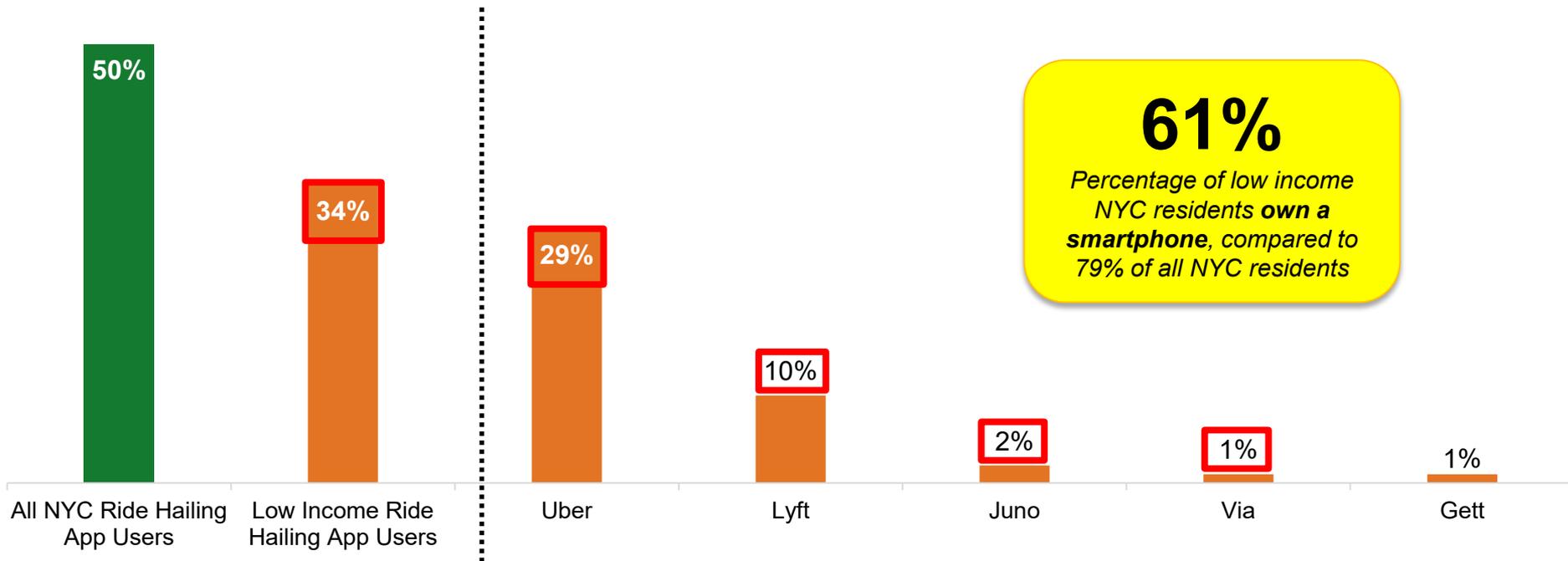
# LOW INCOME – RIDE HAILING APPS

## PHONE ONLY

- Of the 61% of low income New Yorkers who own a smartphone, 34% are members of ride hailing apps
- Uber (29%) is the most used service, followed by Lyft (10%), mirroring the trend we saw in All NYC where Uber was 40% and Lyft was 19%

### Ride Hailing App Membership [Low Income]

Among Low Income Smartphone Owners (n=400) and All NYC Low Income Smartphone Owners (n=1,978)



Indicates significantly higher than All NYC at 95% confidence interval

Indicates significantly lower than All NYC at 95% confidence interval

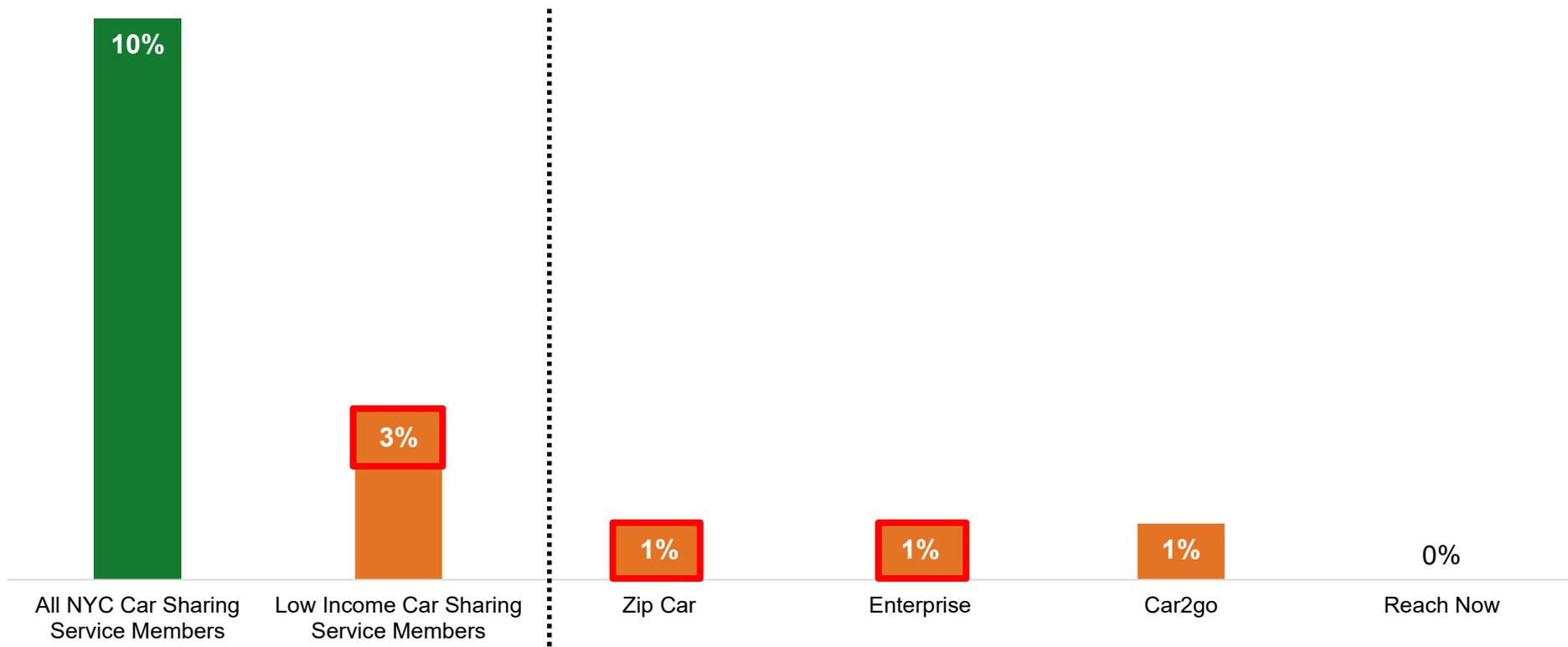
# LOW INCOME – CAR SHARING SERVICE

## PHONE ONLY

- Only 3% of low income New Yorkers participate in car sharing services, coming in below the All NYC average (10%)

### Car Sharing Service Membership [Low Income]

Showing Low Income NYC (n=652) and All NYC (n=2,509)



Indicates significantly higher than All NYC at 95% confidence interval

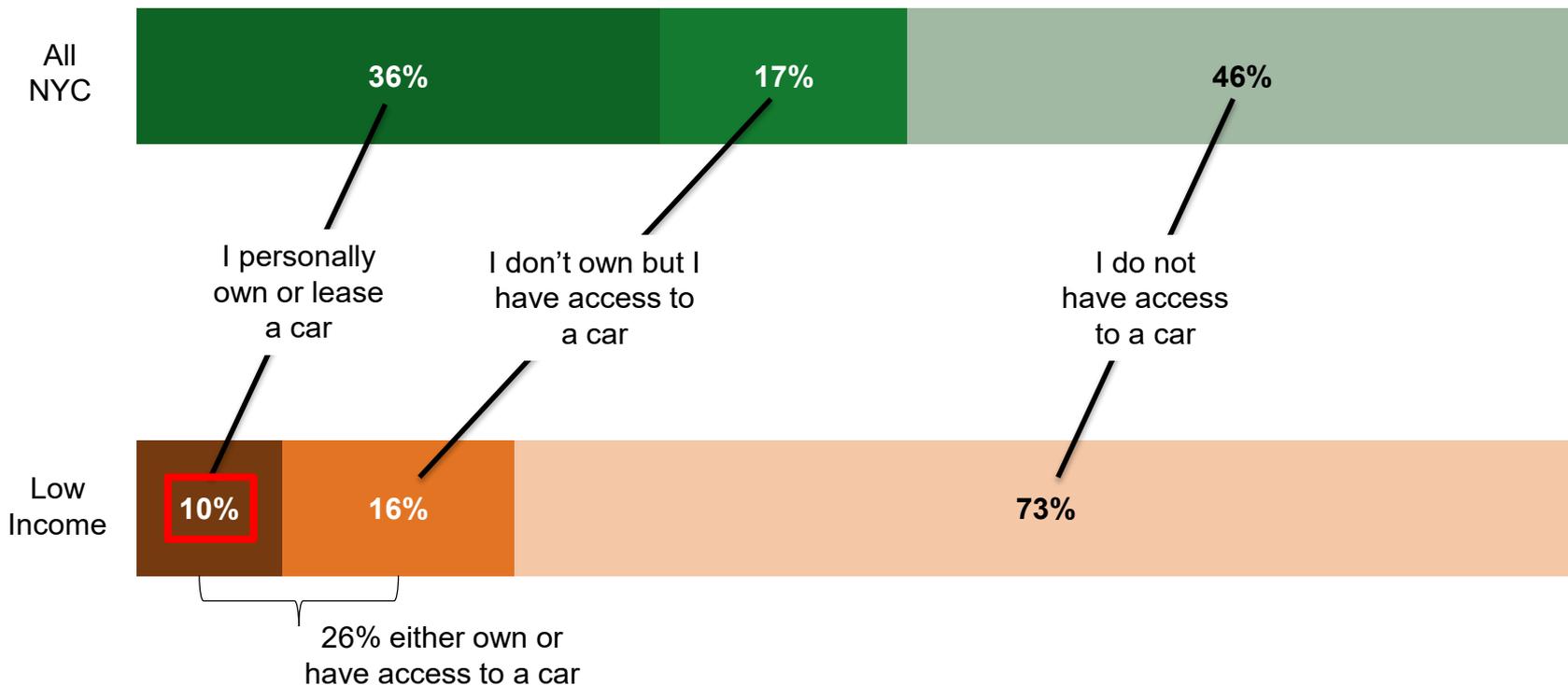
Indicates significantly lower than All NYC at 95% confidence interval

# LOW INCOME – CAR ACCESS

## PHONE ONLY

- 26% of low income New Yorkers either own or have access to a car, compared to the All NYC average (53%)

Car Ownership and Access  
Showing Low Income NYC (n=652) and All NYC (n=2,509)



Indicates significantly higher than All NYC at 95% confidence interval

Indicates significantly lower than All NYC at 95% confidence interval

# LOW INCOME – FREIGHT USAGE

## PHONE ONLY

- Low income New Yorkers overall receive deliveries significantly less (8%) at least several times a week than the All NYC average (11%)
- The most frequently used freight option among low income New Yorkers, based on daily and several times a week frequency, is prepared food (10%), slightly below the All NYC average (14%)
- Similar to the All NYC average, low income New Yorkers rarely have groceries or personal items delivered

### Frequency of Receiving Freight Deliveries [Low Income]

Among Low Income All NYC, Ranked By Top 2 Box (Daily + Several times a week)



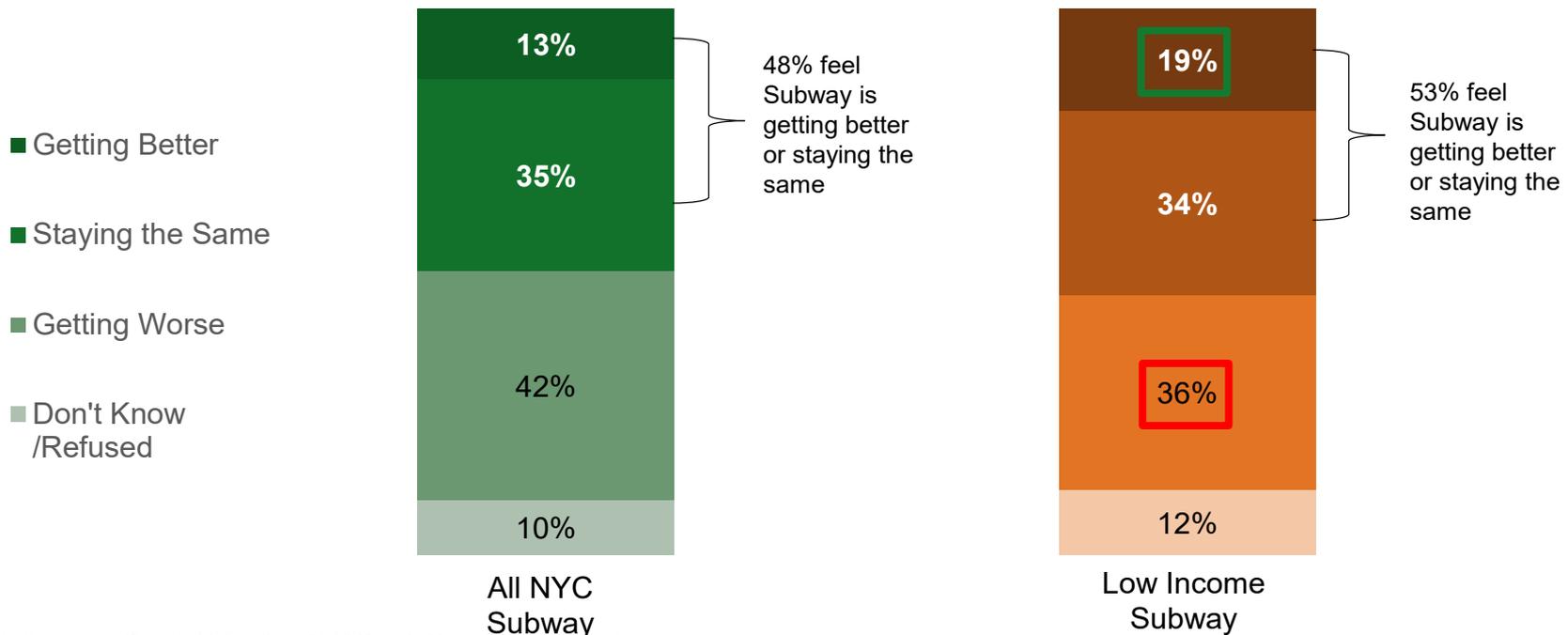
# LOW INCOME – SUBWAY SERVICE

## PHONE ONLY

- Over half (53%) of low income New Yorkers feel that the subway is getting better or staying the same, more than the All NYC average (48%)

### Perception of Subway Services [Low Income]

Showing Low Income NYC (n=652) and All NYC (n=2,509)



Indicates significantly higher than All NYC at 95% confidence interval

Indicates significantly lower than All NYC at 95% confidence interval

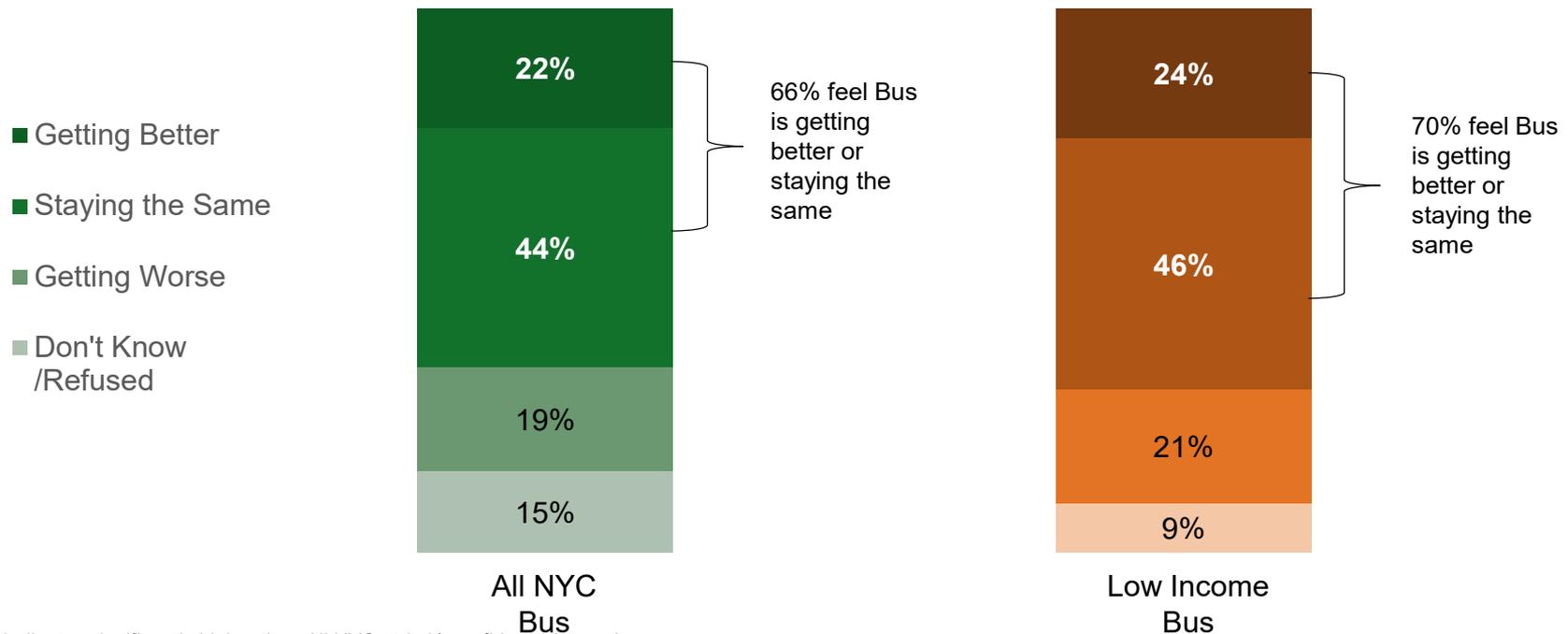
# LOW INCOME –BUS SERVICE

## PHONE ONLY

- 70% of low income New Yorkers feel that the bus is getting better or staying the same, more than the All NYC average (66%)

### Perception of Subway and Bus Services [Low Income]

Showing Low Income NYC (n=652) and All NYC (2,509)



- Getting Better
- Staying the Same
- Getting Worse
- Don't Know /Refused

■ Indicates significantly higher than All NYC at 95% confidence interval  
■ Indicates significantly lower than All NYC at 95% confidence interval

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# Appendix

# 9

# Zone Snapshots

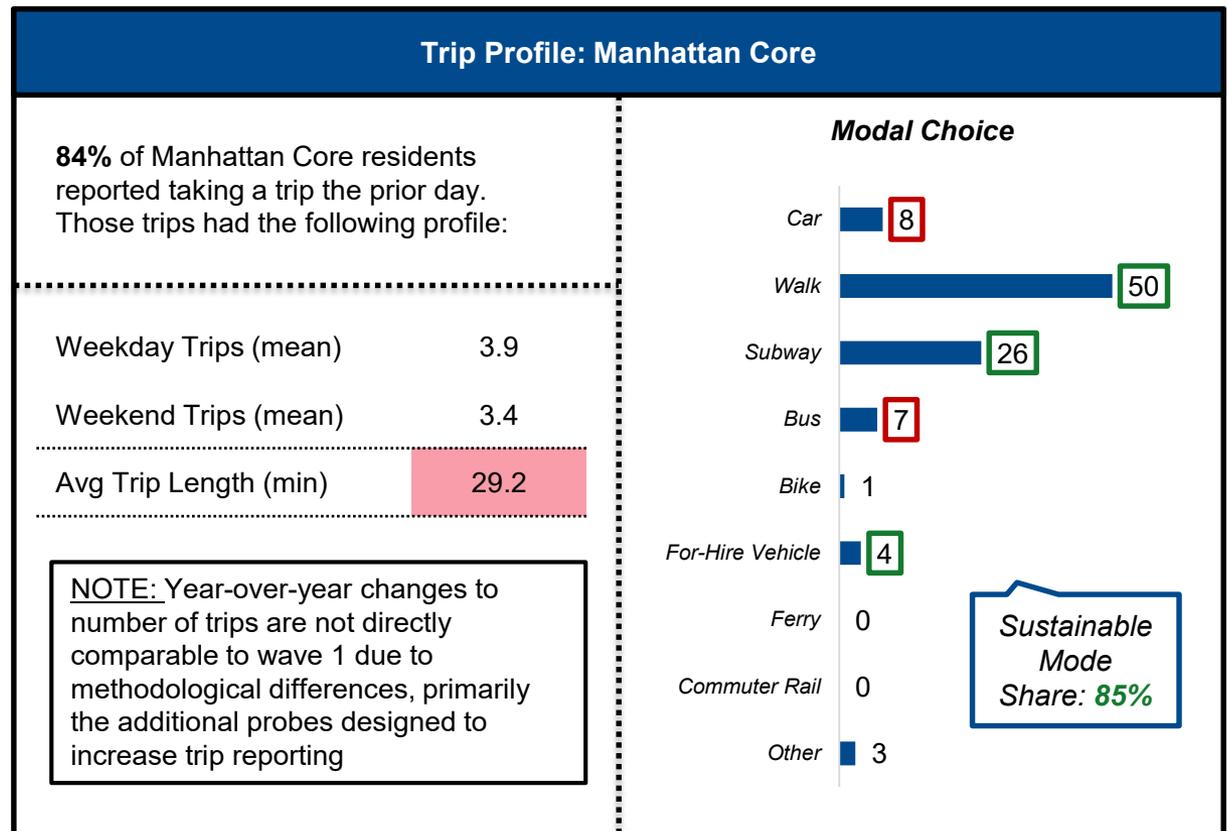


# ZONE SNAPSHOT – MANHATTAN CORE

## PHONE & ONLINE (COMBO)

- Manhattan Core’s trips are predominately walking trips
- Manhattan Core residents’ trips are significantly shorter in length than New Yorkers’ at large

Demographic Profile	Manhattan Core	
Age	18-34	32
	35-54	34
	55+	33
Ethnicity	White	58
	Non-White	42
	Hispanic	19
Income	Less than \$25K	15
	\$25K-\$50K	11
	\$50K-\$100K	29
	\$100K-\$150K	20
	\$150K+	20



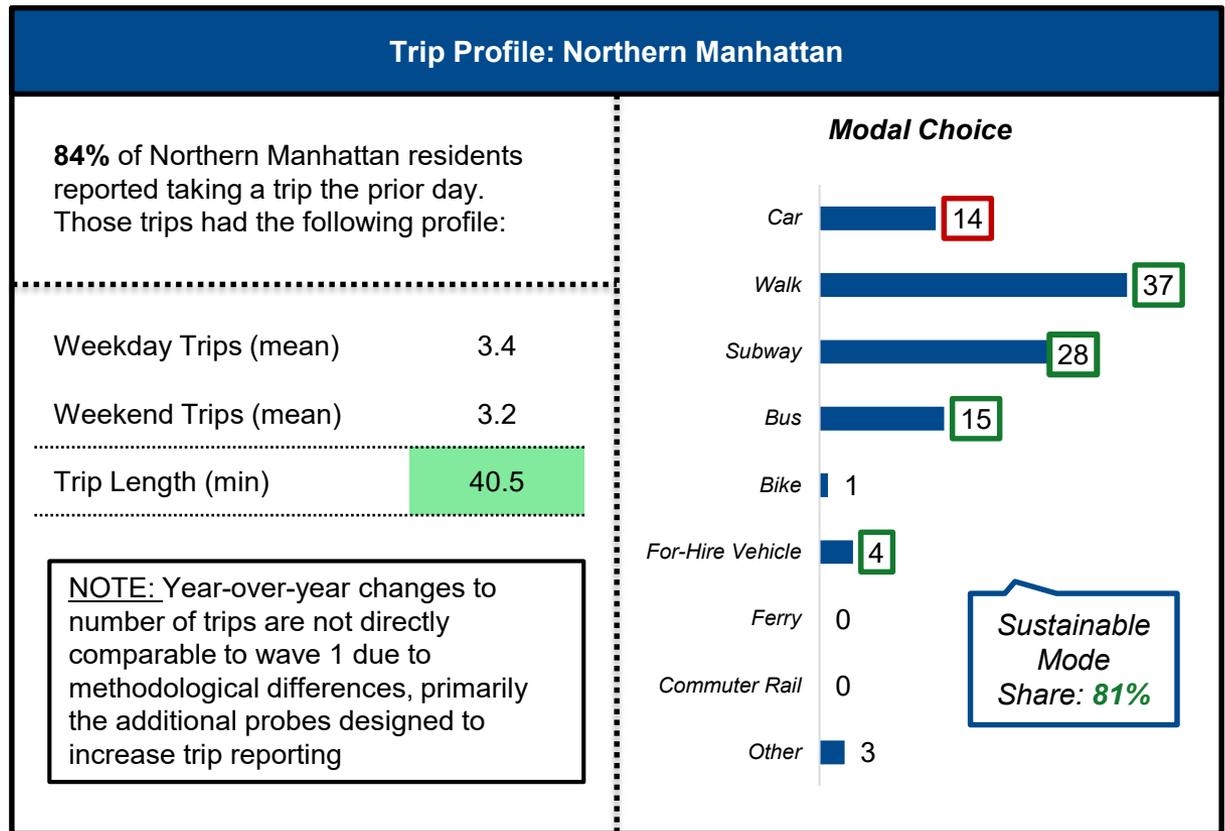
■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

# ZONE SNAPSHOT – NORTHERN MANHATTAN

## PHONE & ONLINE (COMBO)

- Northern Manhattan’s trips are significantly more likely to be subway, bus, or walking trips
- Residents report significantly longer trips than New Yorkers in general
- For-hire vehicle is a significantly more popular trip mode in Northern Manhattan than in other zones

Demographic Profile	Northern Manhattan	
Age	18-34	31
	35-54	36
	55+	33
Ethnicity	White	30
	Non-White	70
	Hispanic	51
Income	Less than \$25K	35
	\$25K-\$50K	20
	\$50K-\$100K	24
	\$100K-\$150K	12
	\$150K+	6



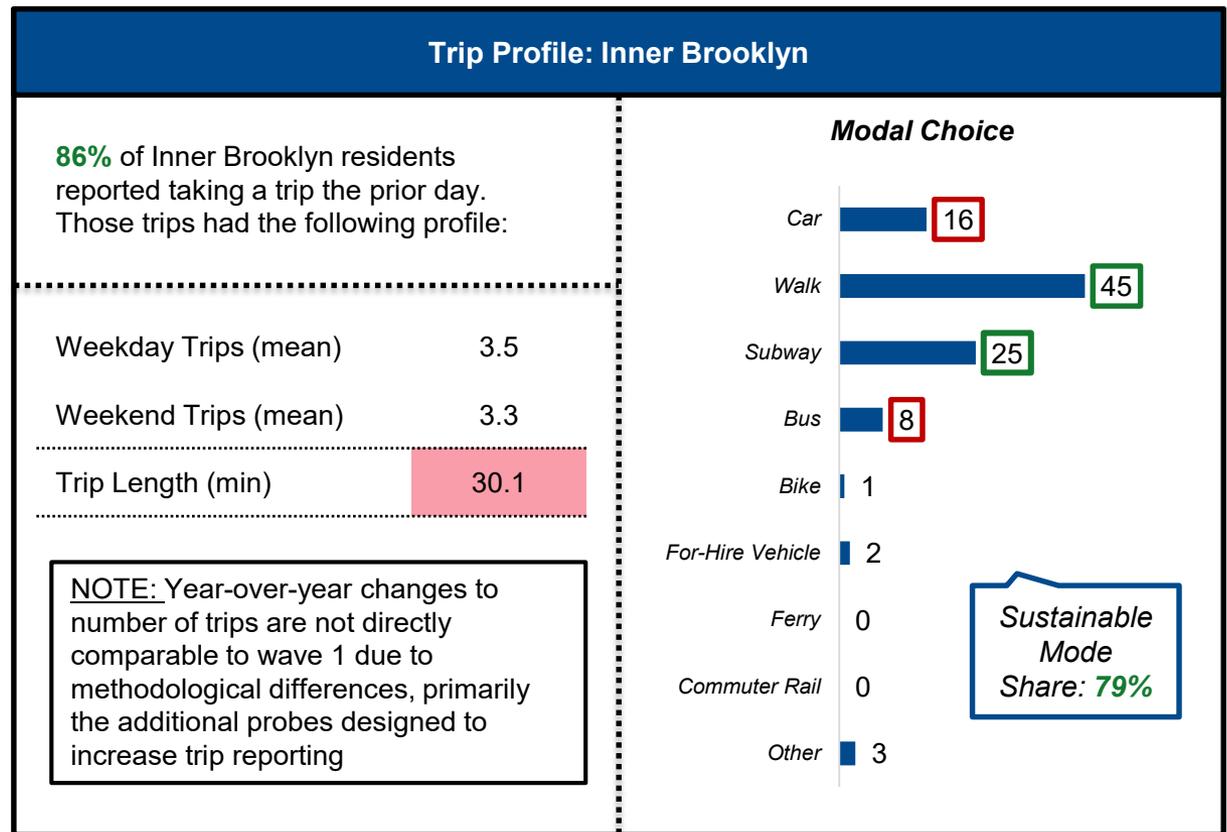
■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

# ZONE SNAPSHOT – INNER BROOKLYN

## PHONE & ONLINE (COMBO)

- Inner Brooklyn residents are significantly more likely to report walking and subway trips
- Car and bus are less popular trip modes in Inner Brooklyn
- Residents' trips are also shorter than average

Demographic Profile	Inner Brooklyn	
Age	18-34	34
	35-54	40
	55+	26
Ethnicity	White	35
	African American	38
	Hispanic	27
Income	Less than \$25K	32
	\$25K-\$50K	25
	\$50K-\$100K	21
	\$100K-\$150K	14
	\$150K+	4



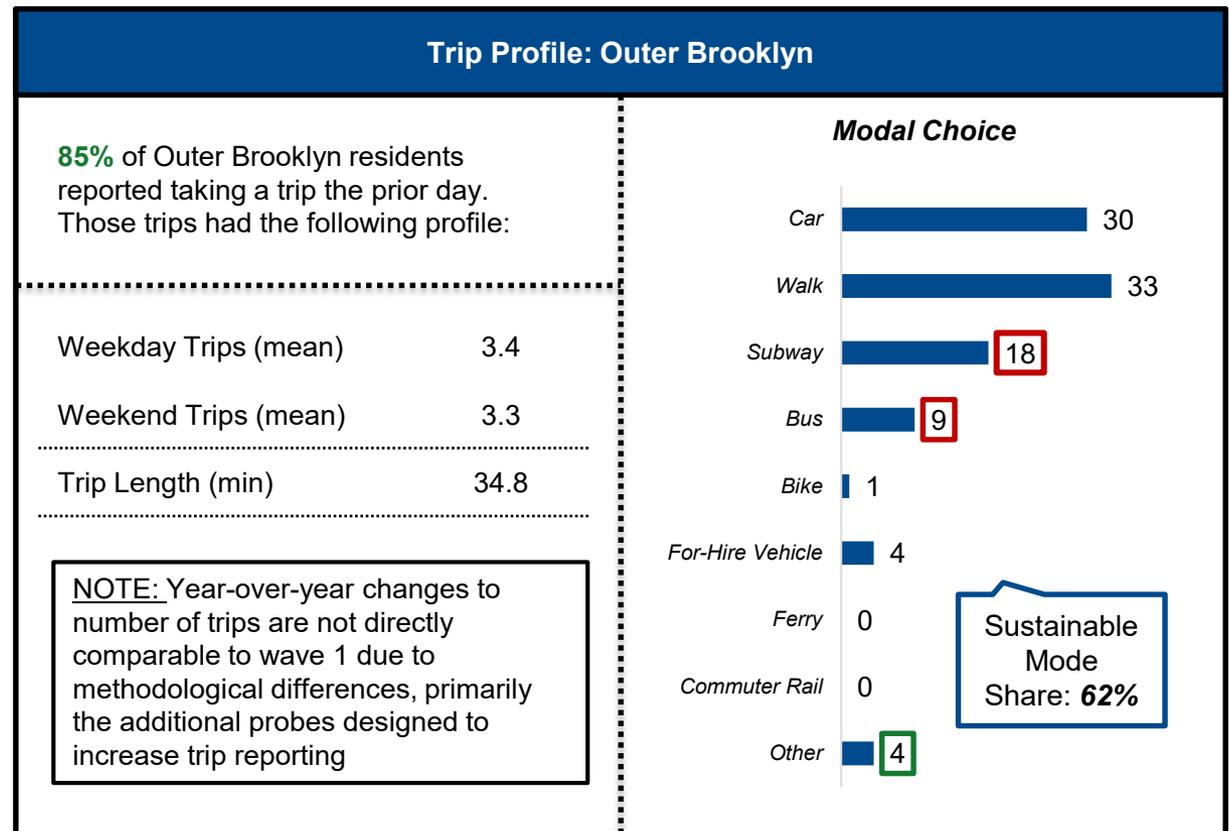
■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

# ZONE SNAPSHOT – OUTER BROOKLYN

## PHONE & ONLINE (COMBO)

- Outer Brooklyn residents are significantly to report taking trips than New Yorkers on average
- Residents' trips are significantly less likely to be subway or bus trips

Demographic Profile	Outer Brooklyn	
Age	18-34	44
	35-54	28
	55+	28
Ethnicity	White	41
	Non-White	59
	Hispanic	18
Income	Less than \$25K	27
	\$25K-\$50K	27
	\$50K-\$100K	25
	\$100K-\$150K	14
	\$150K+	4



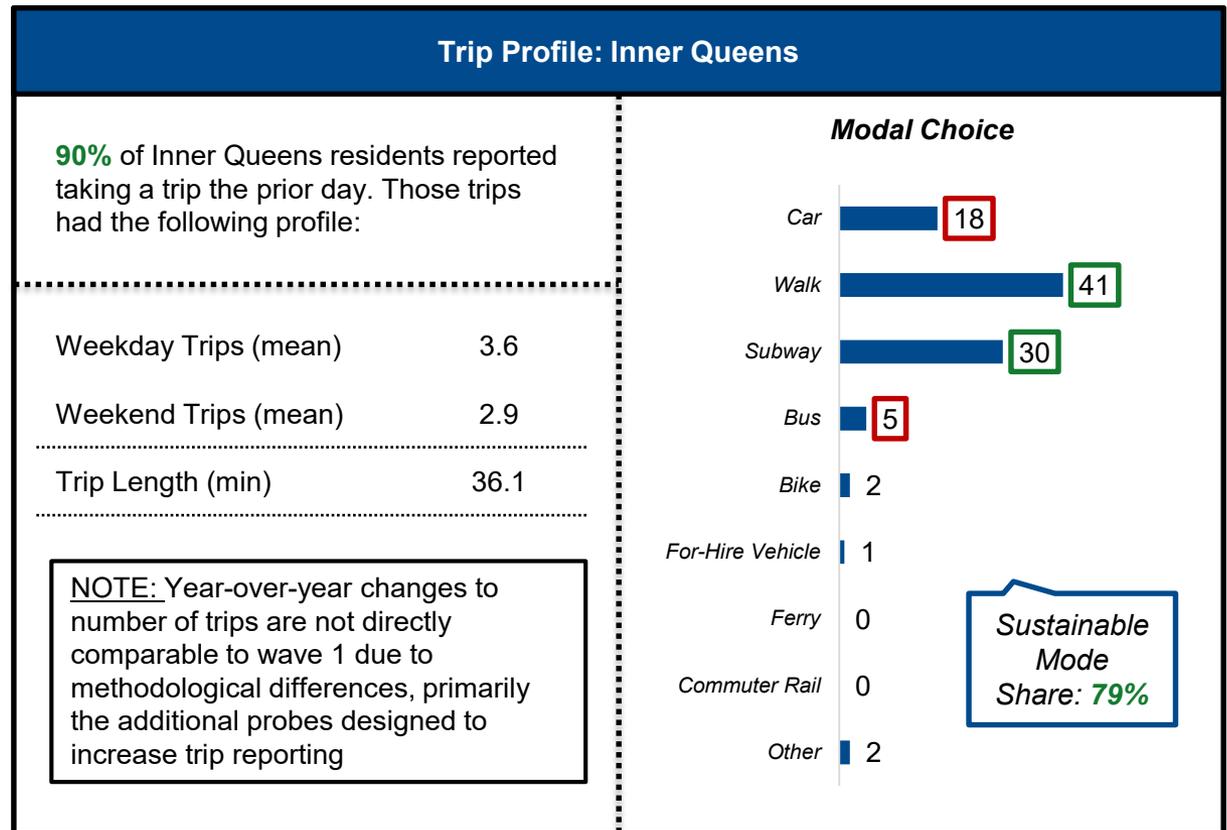
■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

# ZONE SNAPSHOT – INNER QUEENS

## PHONE & ONLINE (COMBO)

- Inner Queens residents are significantly more likely to report walking or subway trips
- Residents' are also significantly more likely to report having taken a trip, and their sustainable mode share is higher than New Yorkers' on average

Demographic Profile	Inner Queens	
Age	18-34	38
	35-54	34
	55+	29
Ethnicity	White	35
	Non-White	65
	Hispanic	29
Income	Less than \$25K	24
	\$25K-\$50K	19
	\$50K-\$100K	34
	\$100K-\$150K	13
	\$150K+	7



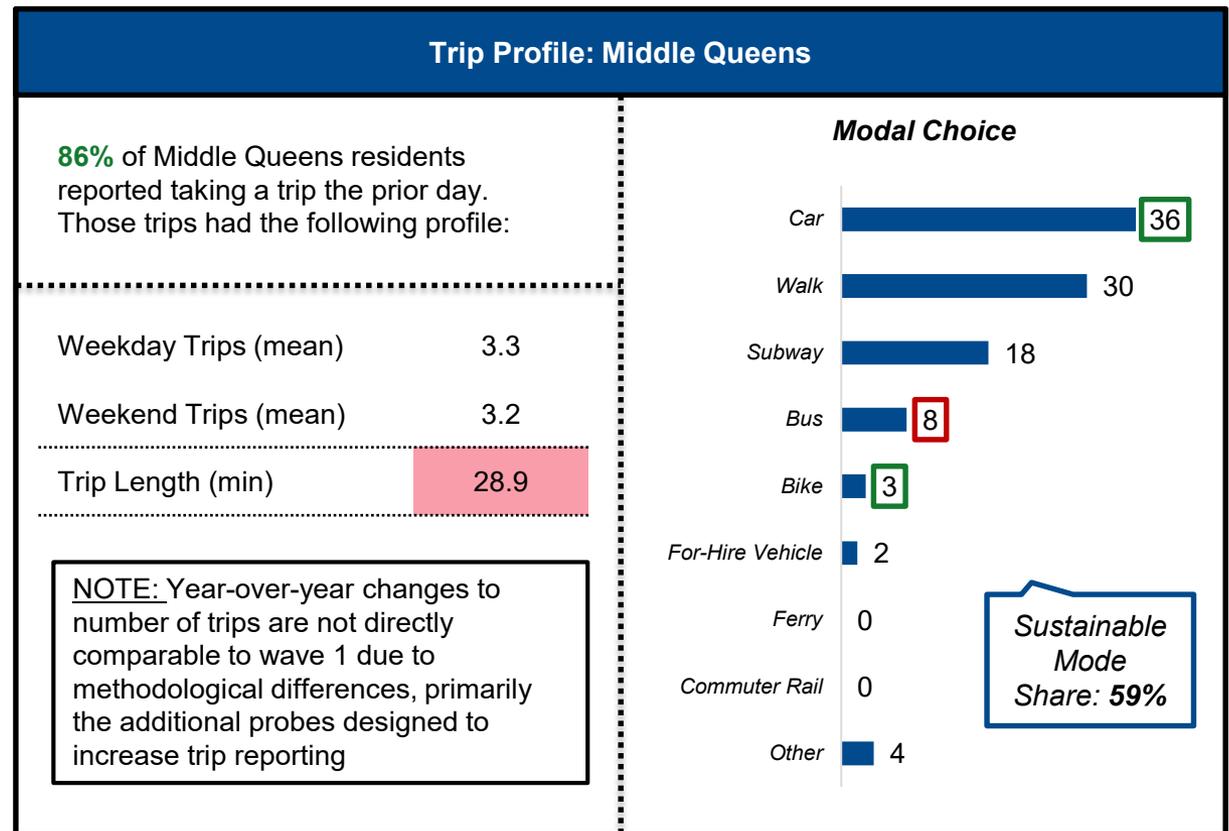
■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

# ZONE SNAPSHOT – MIDDLE QUEENS

## PHONE & ONLINE (COMBO)

- Middle Queens residents report significantly more car and bike trips, but significantly less bus trips
- Middle Queens trips are significantly shorter than average

Demographic Profile	Middle Queens	
Age	18-34	29
	35-54	35
	55+	36
Ethnicity	White	46
	Asian	33
	Hispanic	14
Income	Less than \$25K	19
	\$25K-\$50K	15
	\$50K-\$100K	30
	\$100K-\$150K	25
	\$150K+	8



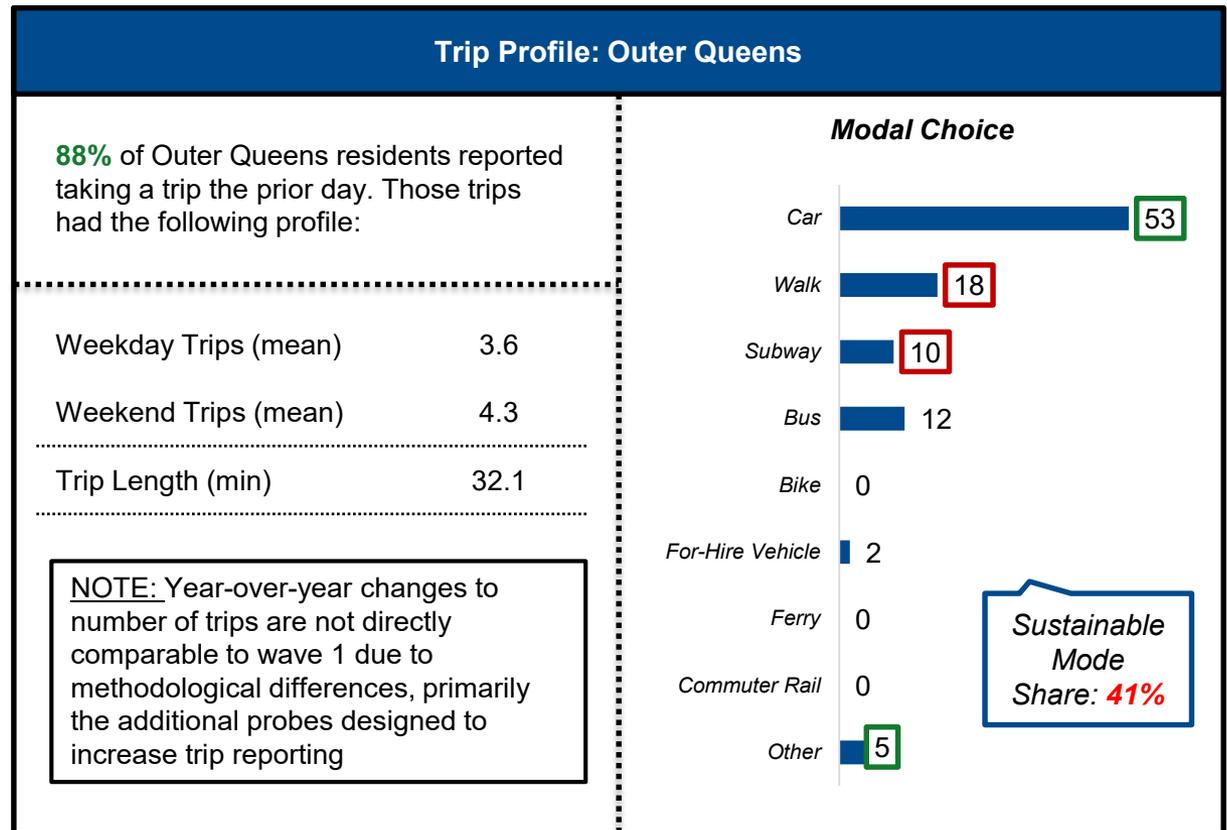
■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

# ZONE SNAPSHOT – OUTER QUEENS

## PHONE & ONLINE (COMBO)

- Outer Queens residents are significantly more likely to report car trips and are significantly less likely to report walking or subway trips
- Residents also have a significantly lower than average sustainable mode share

Demographic Profile	Outer Queens	
Age	18-34	29
	35-54	31
	55+	41
Ethnicity	White	38
	Asian	18
	Hispanic	18
Income	Less than \$25K	20
	\$25K-\$50K	19
	\$50K-\$100K	34
	\$100K-\$150K	21
	\$150K+	4



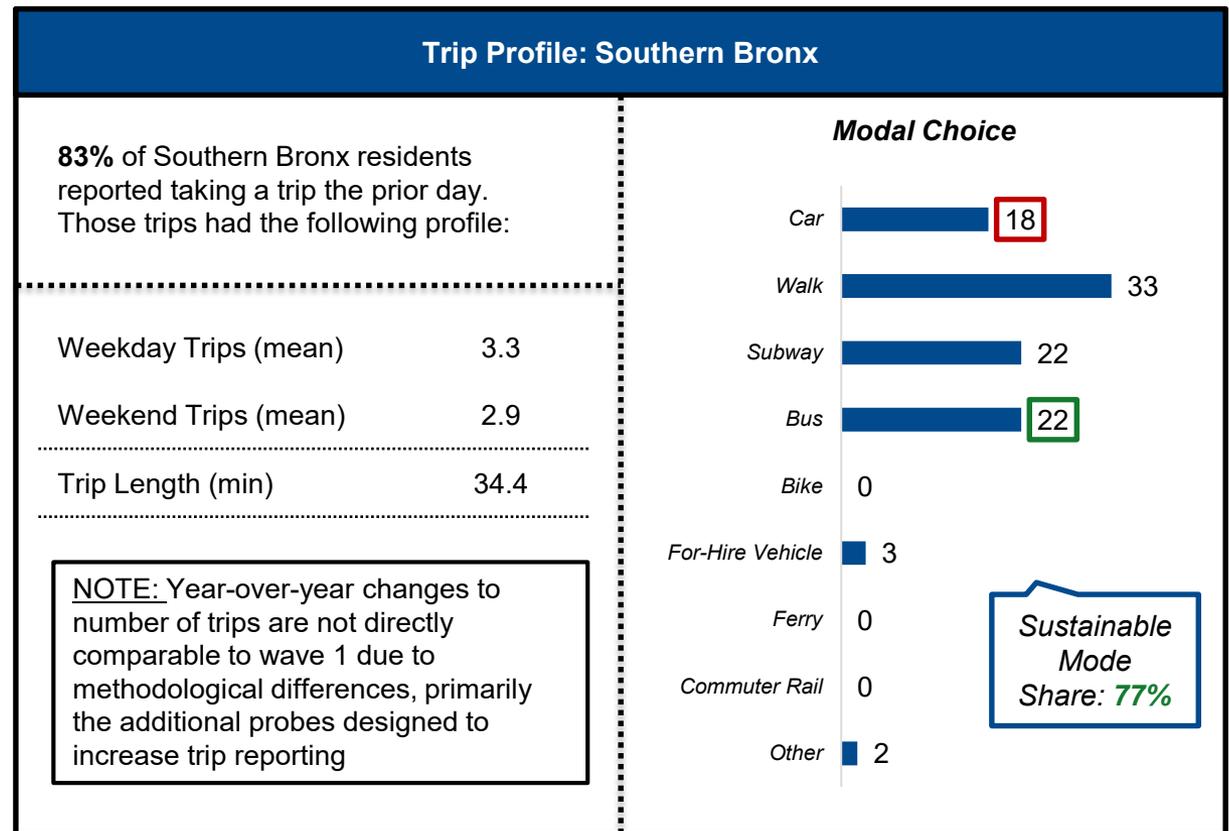
■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

# ZONE SNAPSHOT – SOUTHERN BRONX

## PHONE & ONLINE (COMBO)

- Southern Bronx residents are significantly more likely report bus trips, and less likely to report car trips
- Southern Bronx residents report significantly more sustainable mode trips

Demographic Profile	Southern Bronx	
Age	18-34	34
	35-54	37
	55+	28
Ethnicity	White	8
	Non-White	92
	Hispanic	65
Income	Less than \$25K	49
	\$25K-\$50K	24
	\$50K-\$100K	17
	\$100K-\$150K	6
	\$150K+	0



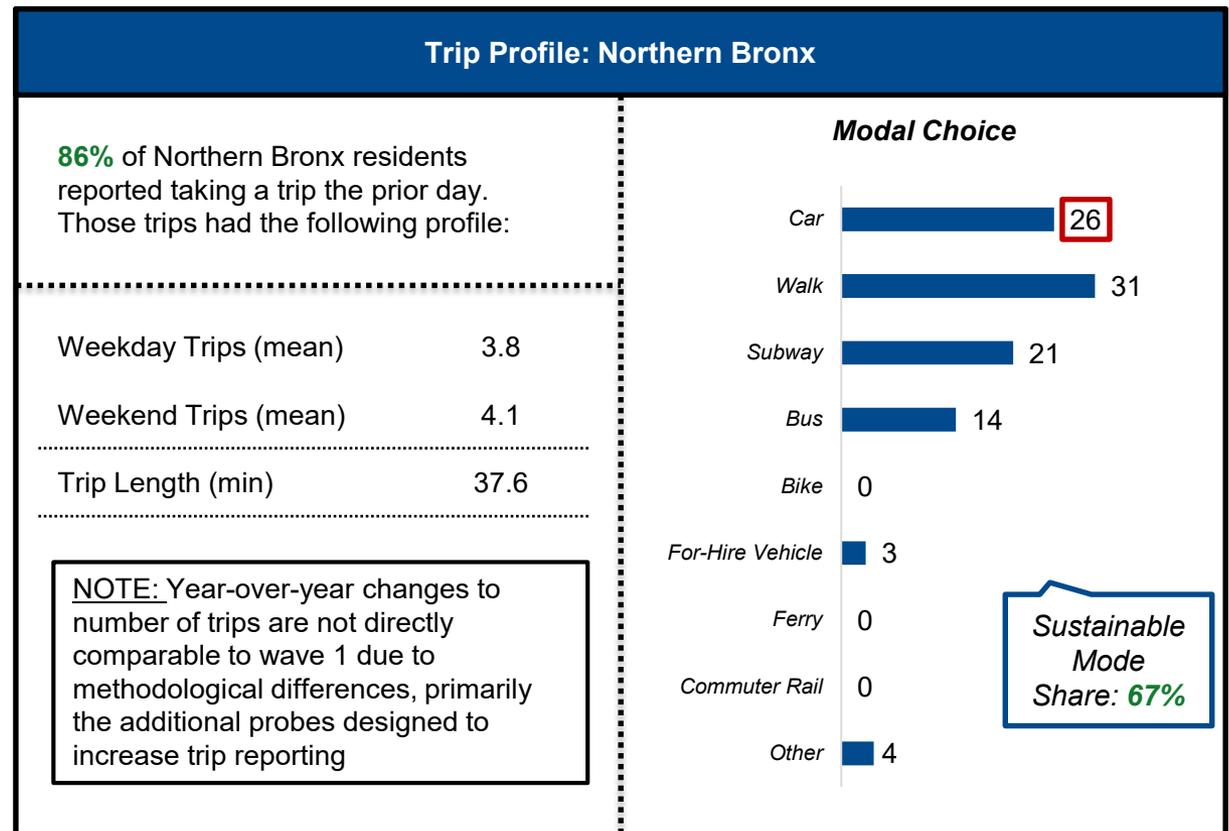
■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

# ZONE SNAPSHOT – NORTHERN BRONX

## PHONE & ONLINE (COMBO)

- Northern Bronx residents are significantly less likely to include car
- Northern Bronx residents also have a significantly higher than average sustainable mode share

Demographic Profile	Northern Bronx	
Age	18-34	31
	35-54	35
	55+	34
Ethnicity	White	20
	Non-White	80
	Hispanic	40
Income	Less than \$25K	24
	\$25K-\$50K	21
	\$50K-\$100K	34
	\$100K-\$150K	15
	\$150K+	2



■ Indicates significantly higher than All NYC at 95% confidence interval ■ Indicates significantly lower than All NYC at 95% confidence interval

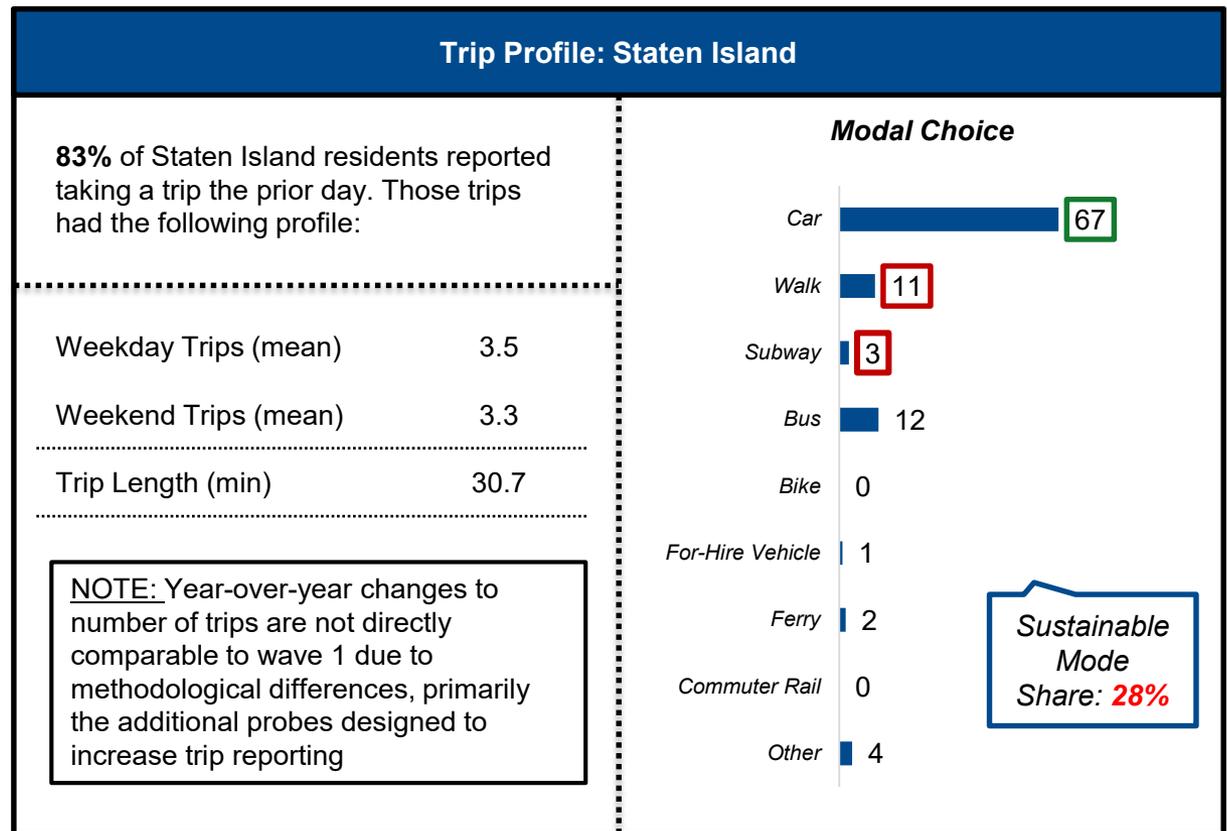
# ZONE SNAPSHOT – STATEN ISLAND

## PHONE & ONLINE (COMBO)

- Two thirds of Staten Island residents' trips utilize cars and Staten Island residents' trips are the least likely to include walking or the subway
- Staten Island residents have the lowest sustainable mode share of any zone

Demographic Profile	Staten Island	
Age	18-34	20
	35-54	45
	55+	35
Ethnicity	White	71
	Non-White	29
	Hispanic	18
Income	Less than \$25K	13
	\$25K-\$50K	14
	\$50K-\$100K	30
	\$100K-\$150K	27
	\$150K+	11

■ Indicates significantly higher than All NYC at 95% confidence interval
 ■ Indicates significantly lower than All NYC at 95% confidence interval



# Mode Detail



# MODAL CHOICE – COMMUTE

## PHONE & ONLINE (COMBO)

- Across zones, commutes are significantly more likely to utilize the subway and significantly more likely to be multi-modal.
- Bus trips make up a higher proportion of commutes in Outer Queens, the Bronx, and Staten Island.

Modal Choice – Commuting Trips	All NYC n=2,330	Manhattan Core n=221	Northern Manhattan n=226	Inner Brooklyn n=327	Outer Brooklyn n=372	Inner Queens n=155	Middle Queens n=135	Outer Queens n=299	Southern Bronx n=212	Northern Bronx n=218	Staten Island n=145
Trip Duration (min.)	41.5	32.8	36.0	37.8	46.2	45.6	42.9	43.5	41.2	46.1	41.3
Subway	35	42	48	45	33	42	43	18	40	36	3
Car	29	9	13	19	34	18	30	54	20	25	62
Walk	19	33	21	25	19	21	15	9	19	17	5
Bus	11	8	13	7	9	12	7	10	16	14	21
For-Hire Vehicle	2	3	4	1	2	1	1	2	2	2	0
Commuter Rail	0	0	0	0	0	0	1	1	0	0	0
Bike	1	2	1	1	0	4	1	0	0	0	0
Ferry	0	0	0	0	0	0	0	0	0	0	7
Other	3	3	0	2	3	2	3	5	2	6	2

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

# MODAL CHOICE – SHOPPING

## PHONE & ONLINE (COMBO)

- Across zones, shopping trips are significantly less likely to be multi-modal and utilize transit.
- Shopping trips among Manhattan Core residents are almost entirely walking trips.
- Outer Queens residents utilize their car trips primarily for shopping.

Modal Choice – Shopping Trips	All NYC n=1,113	Manhattan Core n=78	Northern Manhattan n=100	Inner Brooklyn n=203	Outer Brooklyn n=150	Inner Queens n=83	Middle Queens n=90	Outer Queens n=168	Southern Bronx n=89	Northern Bronx n=66	Staten Island n=78
Trip Duration (min.)	25.5	26.3	27.6	24.3	24.8	28.6	22.5	24.2	30.3	28.9	21.1
Walk	53	72	67	72	58	49	47	32	56	45	19
Car	24	1	17	13	23	13	31	43	9	23	69
Bus	9	5	3	4	10	2	10	17	20	11	8
Subway	11	21	13	11	6	31	7	7	14	13	2
For-Hire Vehicle	1	1	0	0	2	2	1	0	0	1	0
Bike	0	1	0	0	0	0	0	0	0	0	1
Commuter Rail	0	0	0	0	0	0	0	0	0	0	0
Ferry	0	0	0	0	0	0	0	0	0	0	0
Other	2	0	0	1	1	3	5	1	0	7	2

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

# MODAL CHOICE – SOCIAL

## PHONE & ONLINE (COMBO)

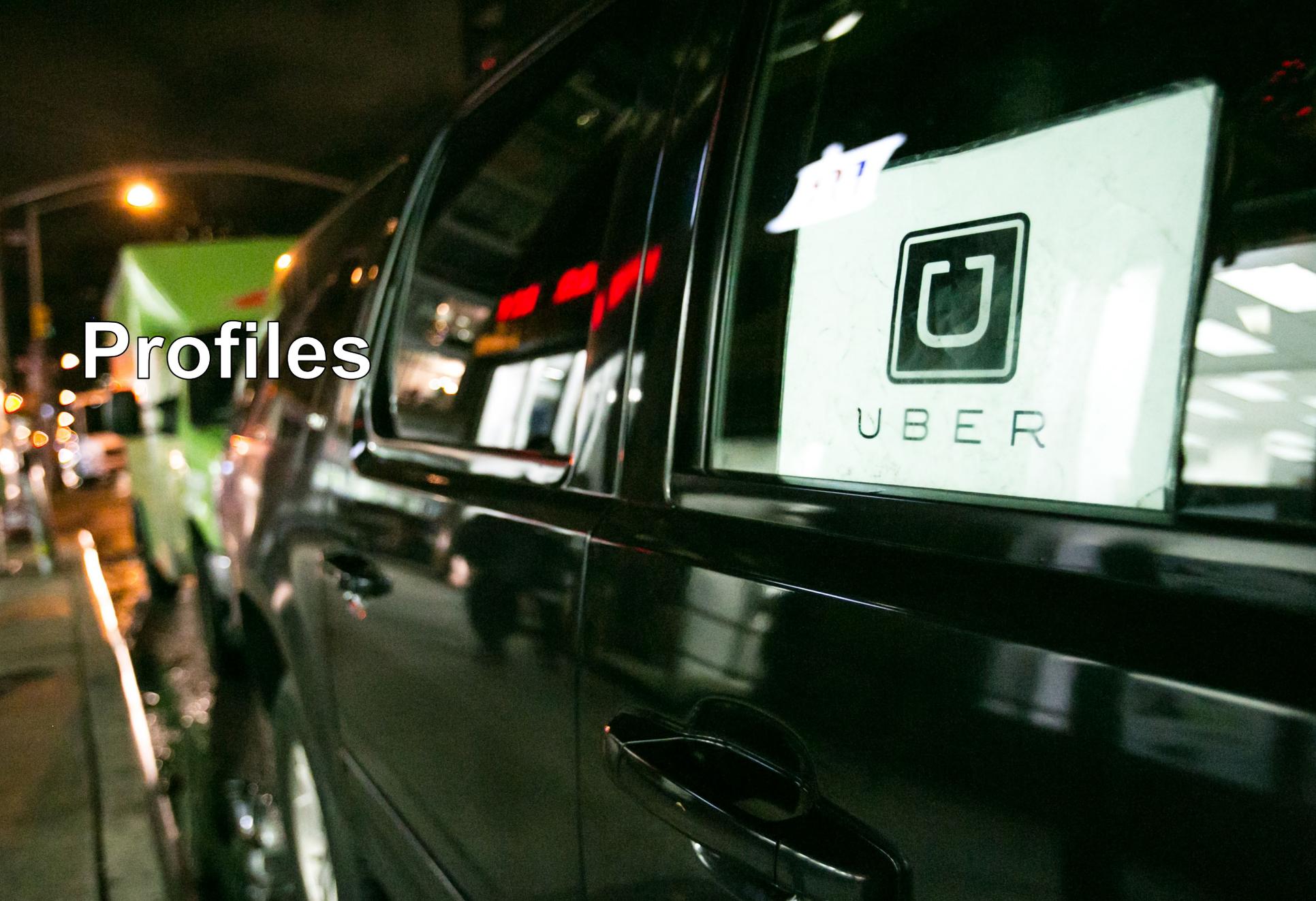
- Residents of Inner Brooklyn, Inner Queens, and Middle Queens are less likely to utilize the subway for social trips.
- Overall, social trips are less likely to be multi-modal outside of Manhattan.

Modal Choice – Social Trips	All NYC n=1,024	Manhattan Core n=158	Northern Manhattan n=100	Inner Brooklyn n=167	Outer Brooklyn n=178	Inner Queens n=53	Middle Queens n=66	Outer Queens n=98	Southern Bronx n=77	Northern Bronx n=67	Staten Island n=55
Trip Duration (min.)	33.6	40.2	36.9	30.3	31.2	52.9	35.5	21.1	30.9	35.6	30.3
Walk	32	42	40	40	24	51	23	21	43	16	18
Car	30	13	12	27	35	15	42	62	8	47	56
Subway	18	29	27	18	21	24	12	3	16	15	9
Bus	10	4	15	7	11	0	2	10	25	16	11
Bike	3	4	3	2	5	6	16	1	1	0	0
For-Hire Vehicle	4	6	3	5	2	3	5	2	6	5	0
Commuter Rail	0	1	0	0	0	0	0	1	0	0	0
Ferry	0	0	0	1	0	1	0	0	0	0	1
Other	1	1	1	1	3	0	0	0	2	1	5

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

# Profiles



# PROFILING NEW MODE USERS

## PHONE ONLY

- Citi Bike, ride-hailing app, and car sharing service members are significantly more likely to be younger, college educated and live in Manhattan

		All NYC (n=2,509) (6,063 trips)	Ride Hailing App Users (n=994) (2,492 trips)	Car Sharing Service Members (n=221) (516 trips)	Citi Bike Users (n=108) (277 trips)
Home Borough	Manhattan	21	26	30	41
	Brooklyn	30	29	35	23
	Queens	27	26	20	18
	The Bronx	16	14	11	13
	Staten Island	6	5	4	5
Age	18-34	33	48	44	45
	35-54	35	38	39	45
	55+	32	14	17	10
Race	White	32	34	46	41
	Black	22	21	20	15
	Hispanic	29	25	22	24
	Asian	13	17	9	17
Income	Less than \$25K	26	14	10	13
	\$25K-\$50K	20	19	16	18
	\$50K-\$100K	27	32	34	29
	\$100K-\$150K	16	21	25	16
	\$150K+	6	9	9	18
Education	Less than HS	12	4	5	4
	HS/Some College	54	44	46	36
	College Degree or more	34	52	49	60
Trip Mode Breakdown	For-Hire Vehicle	2	4	3	4
	Commuter Rail	0	0	0	1
	Bus	12	11	8	8
	Ferry	0	0	0	0
	Subway	21	26	24	30

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

QRIDEHAIL: Which of the following ride hailing apps do you use?

QSHARE: Which of the following car sharing services are you a member of?

QCITIBIKE: Do you use Citi Bike?

# PROFILING CAR OWNERS

## PHONE ONLY

- Over half (52%) of the trips taken the prior day by those with car access were taken by car
- Those with access to a car are significantly more likely to be white and living in Queens

		All NYC (n=2,509) (6,063 trips)	Car access (n=1,325) (3,312 trips)	No car access (n=1,146) (2,687 trips)
Home / Work Borough	Manhattan	21	14	29
	Brooklyn	30	28	33
	Queens	27	35	18
	The Bronx	16	13	19
	Staten Island	6	10	2
Age	18-34	33	29	37
	35-54	35	38	33
	55+	32	33	30
Race	White	32	38	25
	Black	22	22	23
	Hispanic	29	24	35
	Asian	13	13	13
Income	Less than \$25K	26	12	42
	\$25K-\$50K	20	18	22
	\$50K-\$100K	27	33	19
	\$100K-\$150K	16	23	9
	\$150K+	6	8	3
Education	Less than HS	12	6	18
	HS/Some College	54	54	55
	College Degree or more	34	40	27
Trip Mode Breakdown	Car	30	52	5
	Walk	31	22	41
	Subway	21	13	30
	Bus	12	7	18
	Bike	1	1	1

Green boxes indicate significantly above All NYC at 95% confidence interval

Red boxes indicate significantly below All NYC at 95% confidence interval

QCARACCESS: Which of the following best describes your current access to a car?

# Car Ownership



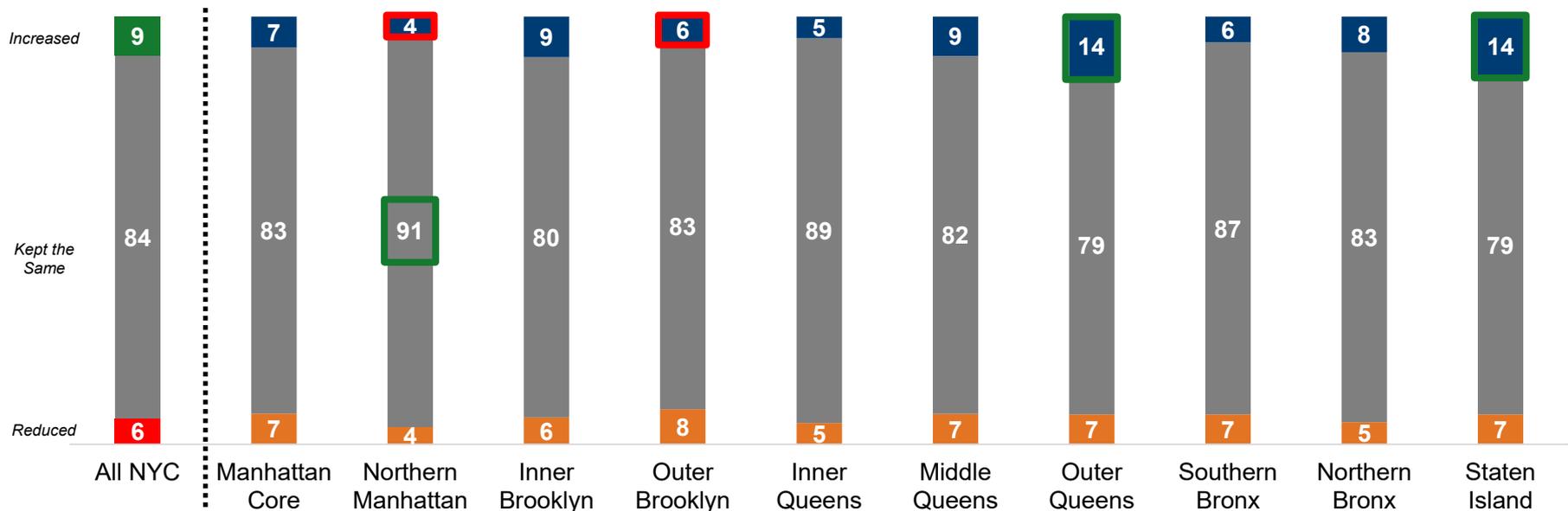
# CHANGING CAR OWNERSHIP

## PHONE & ONLINE (COMBO)

- The vast majority of households with cars report that the number of cars in their household stayed the same over the past two years
- Car ownership increased the most in Staten Island and Outer Queens (by 14%)
- Car ownership was reduced the most in Outer Brooklyn (by 8%)

### Changing Car Ownership in Prior Two Years

Among those with access to a car (n=1,325)



Indicates significantly higher than All NYC at 95% confidence interval

Indicates significantly lower than All NYC at 95% confidence interval

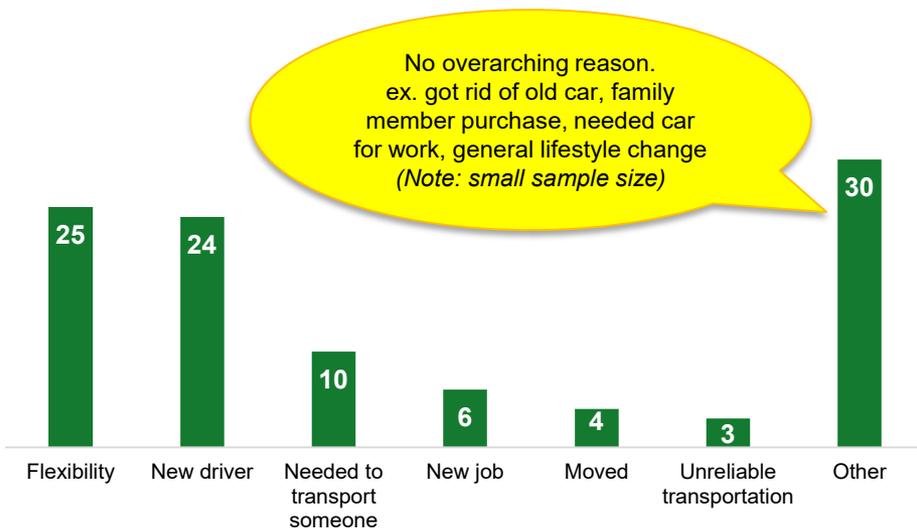
# REASONS FOR CHANGING CAR OWNERSHIP

## PHONE ONLY

- Greater flexibility (25%) and the addition of new drivers (24%) were the top two reasons New Yorkers added cars to their households
- The top reported reason for reducing the number of cars was that they were no longer needed (27%), followed by expensive ownership (17%) and difficult/expensive parking (7%)

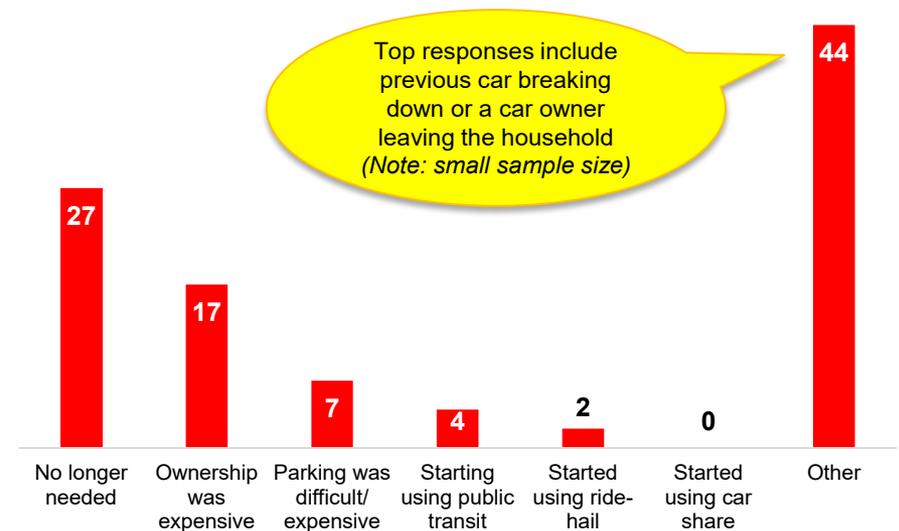
### Reasons for Car Addition

Showing those who added a car in their household in the last two years (n=123)



### Reasons for Car Reduction

Showing those who reduced the number of cars in their household in the last two years (n=81)



\*NOTE: Direct comparisons cannot be made to 2017 as the question was asked differently