Mobility Reimagined

Tracking transportation trends in the U.S. using mobile app & location data

JULY 2020

FOURSQUARE   |   apptopia
Largely driven by the COVID-19 pandemic, people in the U.S. are shifting away from public transportation and ridesharing. Instead, they’re opting for more isolated modes of transportation, such as driving and biking.

By combining Apptopia’s mobile app performance estimates and Foursquare location data, we’ve created a clear, comprehensive picture of this mobility evolution.

These data signals will help you market more intelligently within this rapidly shifting sector — discover new opportunities, identify potential roadblocks, and plan for the road ahead.
Non-essential places of work closed in March, and while public transportation remained open, far fewer people chose this mode of transportation. Even as more people return to work, public transportation continues to decline — perhaps because it’s difficult to distance in these environments.

**KEY INSIGHT:** Visits to metro stations are down 68% since mid-February, while train stations are down 60%.

**KEY INSIGHT:** Daily active users of Apptopia’s Public Transit Index have declined 59% since mid-February.

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**Indexed Foot Traffic To Public Transit Stations**

- Metro Stations
- Train Stations
- Bus Stations

Chart illustrates indexed foot traffic to metro, train & bus stations, where visits February 19, 2020 is 100, using rolling 7 day averages to account for fluctuations by day of week.

**Public Transit Index Daily Active Users, U.S.**

App Index is comprised of DART, MBTA, MTA and MUNI mobile apps [Dallas, Boston, New York City, San Francisco].
Top public transit schedule apps have seen their demand halved from one year ago — further evidence that there’s a lack of interest in subways, trains and buses amongst U.S. commuters.
People may return to public transit in some markets sooner than others. Location data shows the designated market areas (DMAs) in which we expect public transit to recover soonest, based on both the relative decline at the height of the pandemic as well as the rate of recovery.

### Ranking Public Transit Recovery By DMA

<table>
<thead>
<tr>
<th>Rank</th>
<th>DMA</th>
<th>Relative Decline</th>
<th>Rate of Recovery</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Atlanta, GA</td>
<td>Medium</td>
<td>High</td>
</tr>
<tr>
<td>2</td>
<td>San Diego, CA</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>3</td>
<td>Dallas, TX</td>
<td>Low</td>
<td>Medium</td>
</tr>
<tr>
<td>4</td>
<td>Philadelphia, PA</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>5</td>
<td>Minneapolis, MN</td>
<td>Medium</td>
<td>Medium</td>
</tr>
</tbody>
</table>

Relative decline indicates how far a DMA fell in terms of relative foot traffic to public transit locations (metro, train, and bus stations) at the height of the pandemic. Rate of recovery indicates the speed at which visits to public transit is picking back up.

**KEY INSIGHT:** Public transportation is picking back up faster in Southern cities like Atlanta & Dallas, and slower in the Northeast (New York, Boston) and Northwest (San Francisco, Seattle).
While consumers have been slower to start using public transit again, rideshare demand is on the rise. However, combined downloads (March through June) for the two leading ride share apps, Uber and Lyft, are still down 21% year-over-year.

**KEY INSIGHT:** Rideshare demand is still slightly below pre-pandemic levels
ACCELERATING: DRIVING

Rather than taking public transit, commuters are turning to more isolated forms of transportation, like driving, to avoid crowds while commuting.

Indicators from both Foursquare and Apptopia show a returned interest in acquiring new and/or used vehicles.

KEY INSIGHT: Visits to auto dealerships continue to pick up, and active users in Apptopia’s Vehicle Index rebound fully from small dip.
Aside from April, new user growth has increased year-over-year for apps used to shop for and purchase automobiles:

- **March**: +12% YoY
- **April**: -13 YoY
- **May**: +5.2 YoY
- **June**: +16.4% YoY

**KEY INSIGHT:** Interest in and purchases of new and/or used vehicles has grown YoY.

**Vehicle Index New Mobile App Installs, U.S.**

<table>
<thead>
<tr>
<th>Month</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>March</td>
<td>825000</td>
<td>1100000</td>
</tr>
<tr>
<td>April</td>
<td>550000</td>
<td>825000</td>
</tr>
<tr>
<td>May</td>
<td>825000</td>
<td>1100000</td>
</tr>
<tr>
<td>June</td>
<td>825000</td>
<td>1100000</td>
</tr>
</tbody>
</table>

App Index is comprised of Autotrader, CarGurus, Carvana, FordPass, HondaLink, Tesla, Toyota, Volkswagen Car-Net.
As people drive or use ridesharing rather than take public transportation, we’re seeing visitation to gas stations return roughly to pre-pandemic levels. It’s even up in certain regions, despite the fact that fewer people are commuting to and from work.

**KEY INSIGHT:** Visits to gas stations are up most in the Midwest (up 13%), while visits are back to roughly pre-pandemic levels in the West.
ACCELERATING: BIKES & SCOOTERS

As the summer months usher in good weather across the U.S., outdoor forms of isolated travel, including bikes and scooters, are seeing an increase in usage.

While scooters are making their typical comeback from the winter months, it’s bikes that are the inexpensive travel method of choice. New mobile app installs in May & June of bike share apps are up 15.6% and 23.3% year-over-year, respectively.

KEY INSIGHT: Scooter usage is down compared to its ceiling in 2019

Bike Shops & Shares

Indexed Foot Traffic To Bike Shops & Shares

Chart illustrates indexed foot traffic to bike shares/rentals & bike shops where visits on February 19, 2020 = 100, using rolling 7 day averages to account for fluctuations by day of the week.

KEY INSIGHT: Bikeshare providers are in higher demand this year

Bird + Lime Average Daily Active Users Per Month, U.S.

App Index is comprised of Bird and Lime

Bikeshare Index New Mobile App Installs, U.S.

App Index is comprised of Bay Wheels, Bluebikes, Capital Bikeshare, Citi Bike, Divvy Bikes
Not only are modes of transportation changing, but also when we travel is shifting, with people out and about more midday.

Foursquare data 2020; before = week ending 2/19; after = week ending 6/19
**THE DRIVER’S SEAT**

**Commuter Audience Profiles**

<table>
<thead>
<tr>
<th>METRO</th>
<th>TRAIN</th>
<th>DRIVE</th>
<th>BIKE</th>
</tr>
</thead>
</table>
| **COFFEE LOVERS**
  more likely to visit...
  Coffee Shops, Peet’s Coffee, Philz Coffee, Starbucks |
| **CULTURE VULTURES**
  more likely to visit...
  Galleries, Museums, Theaters, Performing Arts Venues |
| **FAST FOOD FANS**
  more likely to visit...
  QSRs, Sonic Drive-In, Hardee’s, Zaxby’s, Burger Joints |
| **FREQUENT TRAVELERS**
  more likely to visit...
  W Hotels, Hotel Bars, Airport Lounges, Marriott Hotels |
| **LUXURY SHOPPERS**
  more likely to visit...
  Bloomingdale’s, Nordstrom, Saks Fifth Avenue |
| **HOSTS & FOODIES**
  more likely to visit...
  Gourmet Shop, Wine Shops, Organic Groceries, BevMo! |
| **FIXER UPPERS**
  more likely to visit...
  Hardware Stores, Garden Centers, Furniture Stores |
| **SPORTS FANS**
  more likely to visit...
  Basketball & Baseball Stadiums, Hockey Arenas, Sports Bars |
| **SELF-CARE ENTHUSIASTS**
  more likely to visit...
  Sephora, Nail Salons, Acupuncturists, Spas |
| **HOUSEHOLD CEOS**
  more likely to visit...
  Big Box & Warehouse Stores, Pet Stores, Post Offices, Banks |
| **OUTDOOR ENTHUSIASTS**
  more likely to visit...
  Parks, REI, Bike Trails, Rock Climbing Spots |

**KEY INSIGHT:** Different audiences may be more apt to choose certain modes of transportation in the days ahead.
KEY TAKEAWAYS
WHAT DOES THIS MEAN FOR YOU?

- **Transportation has changed**
  People are changing how and when they travel

- **Publishers can reach commuters while they’re in transit**
  Take advantage of moments of receptivity

- **Mobility players can capitalize on changing preferences**
  Adapt strategies and contextualize performance

- **Other brands can engage commuters along their journey**
  Influence the places people go on their way from point A to point B.

- **Investors can enable the future of mobility**
  Consider brands and services that tap into consumers’ changing preferences.
Methodology

Apptopia provides competitive intelligence for the mobile app economy. Apptopia was founded on the belief that the mobile app community requires transparency to level the playing field and make way for innovation and industry advancements. Mobile publishers and developers, service providers, and investors use Apptopia on a daily basis to understand and monitor competitors, inform business strategies, and identify emerging consumer interests and trends.

In this report, Apptopia analyzed groupings of individual mobile apps, estimating downloads and daily active users from February through June 2020. Apps included are: DART, MBTA, MTA and MUNI, Citymapper, Moovit, Transit, Uber, Lyft, Autotrader, CarGurus, Carvana, FordPass, HondaLink, Tesla, Toyota, Volkswagen Car-Net, Bird, Lime, Bay Wheels, Bluebikes, Capital Bikeshare, Citi Bike, and Divvy Bikes.

Foursquare is the leading independent location technology platform. Location is at the center of everything we do: we understand location, how people move through the real world, and how those patterns change over time. We use that knowledge and our proprietary technologies to help brands, developers, marketers and analysts understand consumers and engage with them.

In this report, Foursquare analyzed consumer behavior based on foot traffic data from millions of Americans that make up our always-on panel. All data is pseudonymized, aggregated and normalized against U.S. Census data to remove any age, gender and geographical bias. This report analyzes visitation to metro stations, train stations, bus stations, auto dealerships, gas stations, bike rentals, and bike shops in 2019-2020, using rolling 7-day averages to account for fluctuations by day of week.
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