

Mobility Reimagined

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

JULY 2020

FOURSQUARE |  apptopia

MOBILITY REIMAGINED

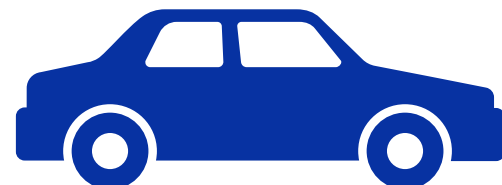
Largely driven by the COVID-19 pandemic, people in the U.S. are shifting away from public transportation and ridesharing. Instead, they're opting for more isolated modes of transportation, such as driving and biking.

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.



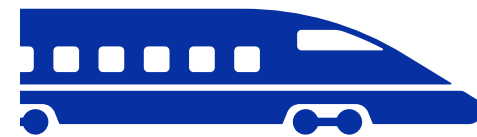
RIDESHARE



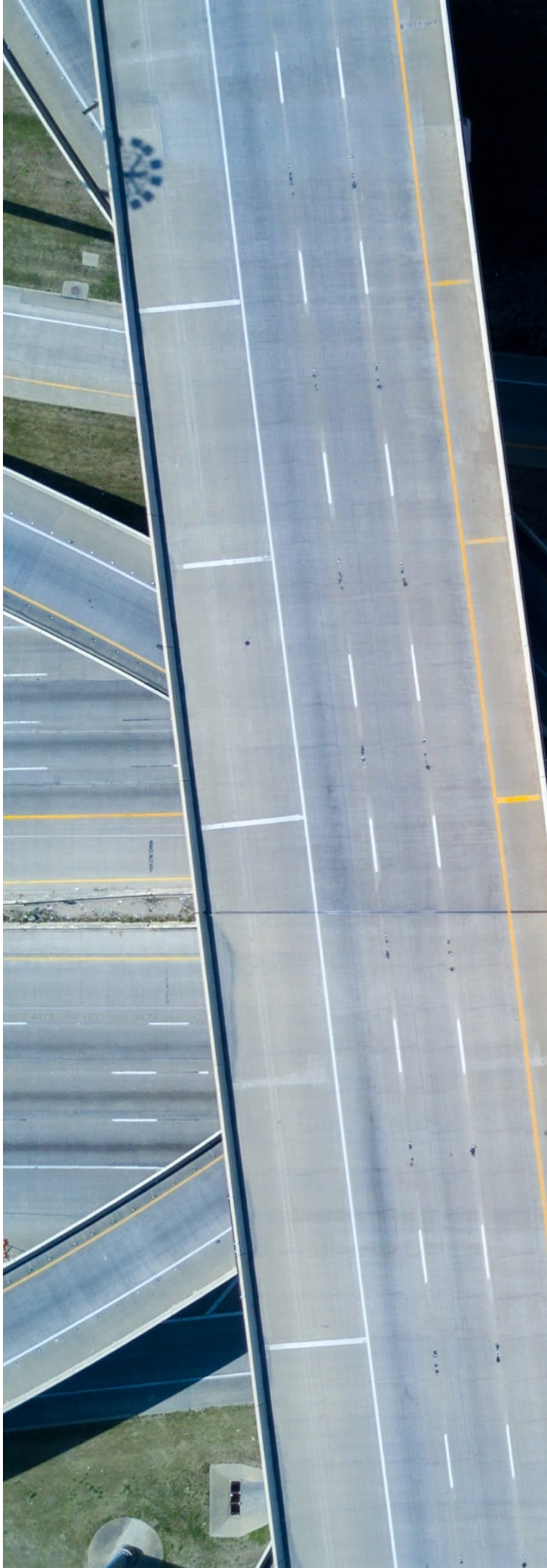
DRIVING



BIKES & SCOOTERS



PUBLIC TRANSIT

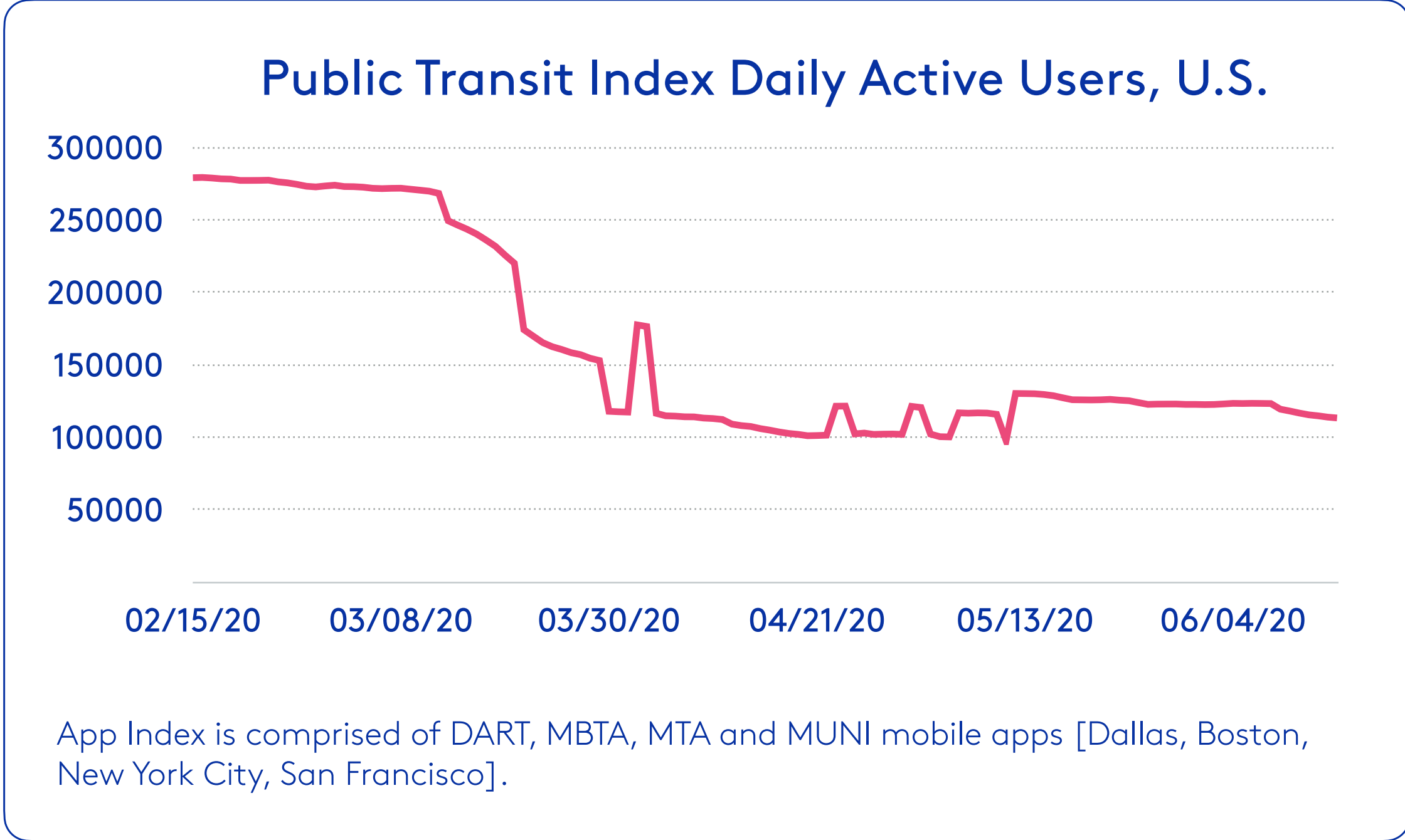
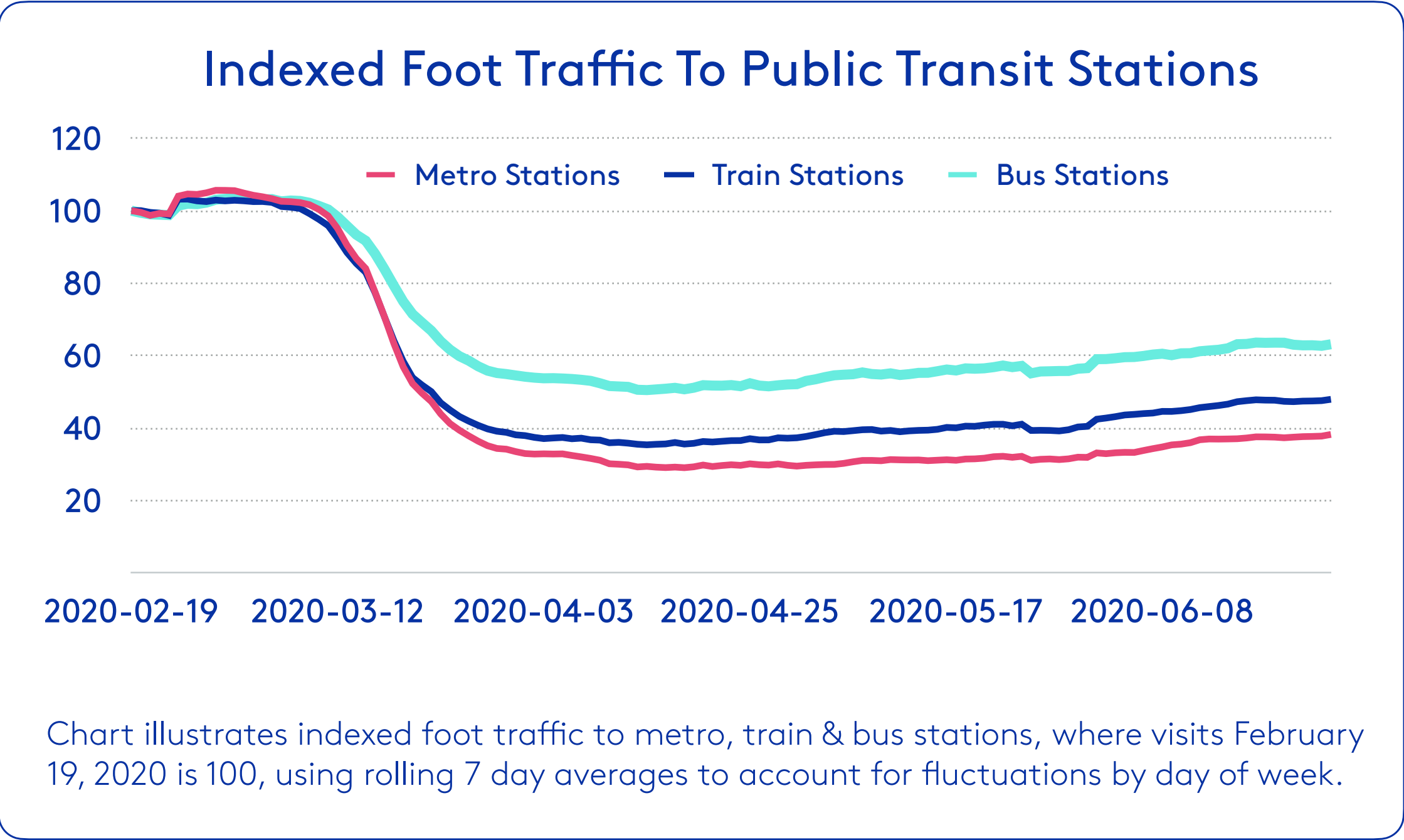


DOWNSHIFT: PUBLIC TRANSIT

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%**

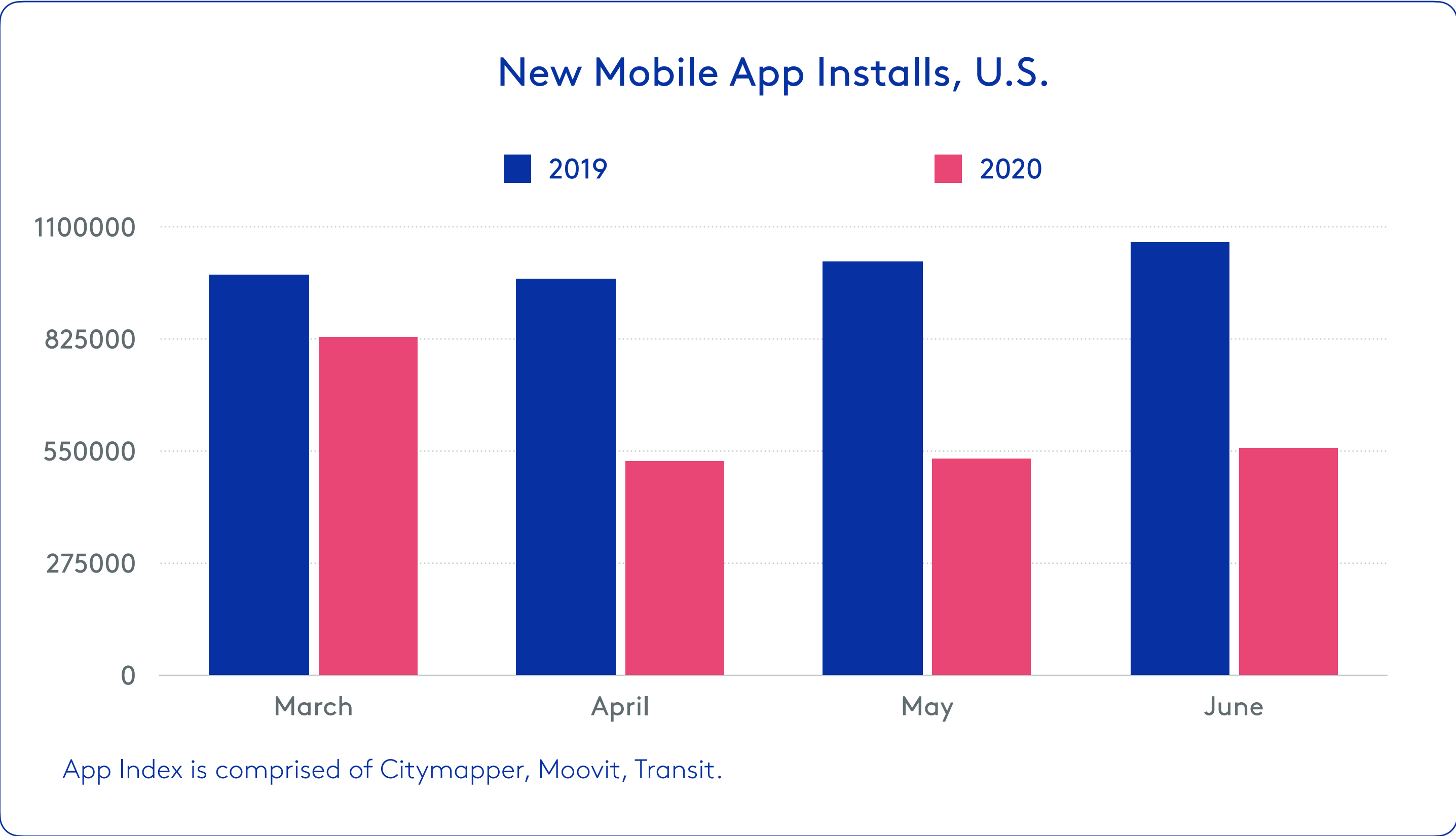
KEY INSIGHT: Daily active users of Apptopia’s Public Transit Index have declined **59%** since mid-February





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.

KEY INSIGHT: Top public transit apps saw their downloads halved year-over-year



DOWNSHIFT: PUBLIC TRANSIT

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

Rank	DMA	Relative Decline	Rate of Recovery
1	Atlanta, GA	Medium	High
2	San Diego, CA	Medium	Medium
3	Dallas, TX	Low	Medium
4	Philadelphia, PA	Medium	Medium
5	Minneapolis, MN	Medium	Medium

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.

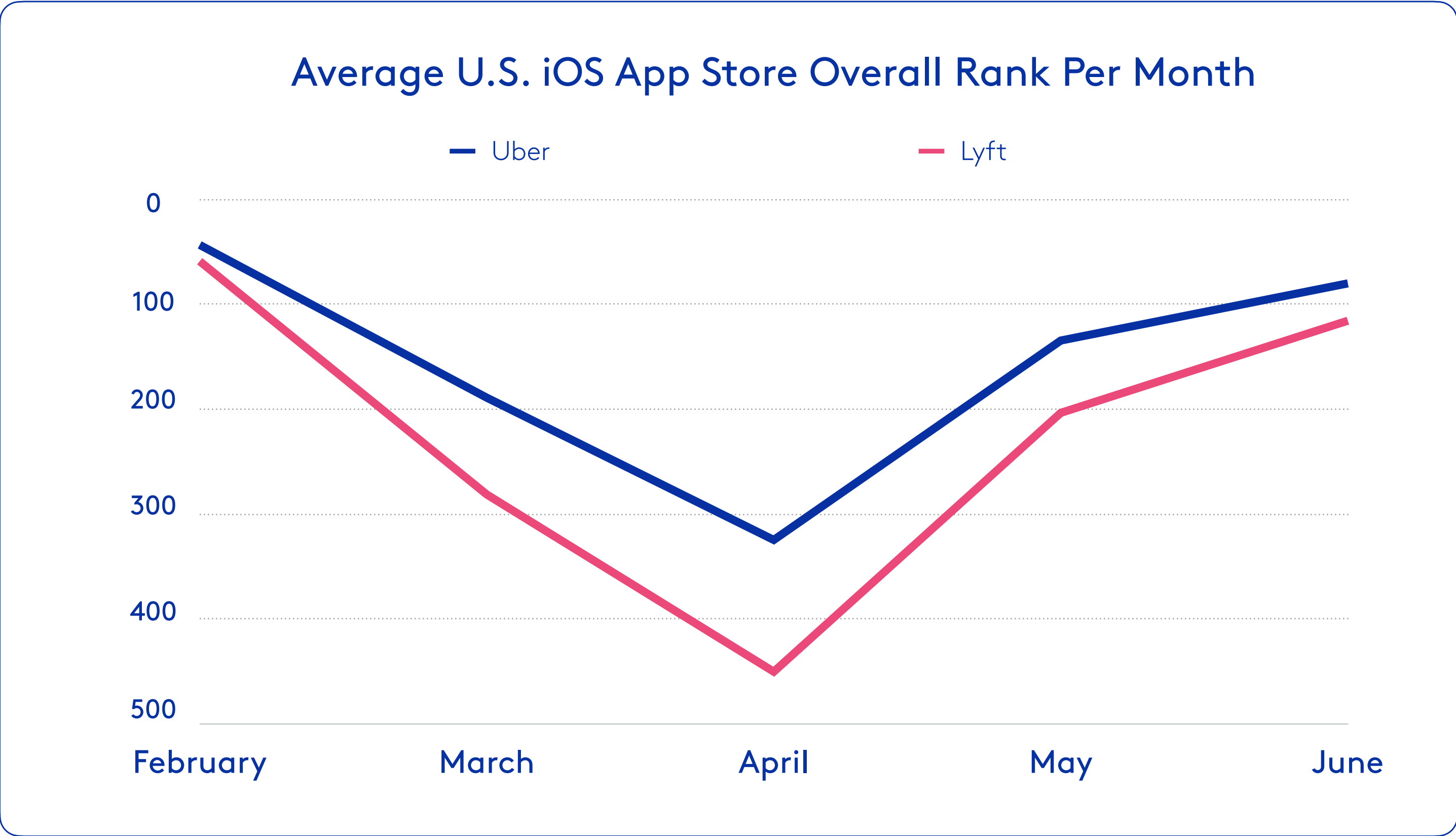
KEY INSIGHT: Public transportation is picking back up faster in Southern cities like Atlanta & Dallas, and slower in the Northeast (New York, Boston) and Northwest (San Francisco, Seattle)



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



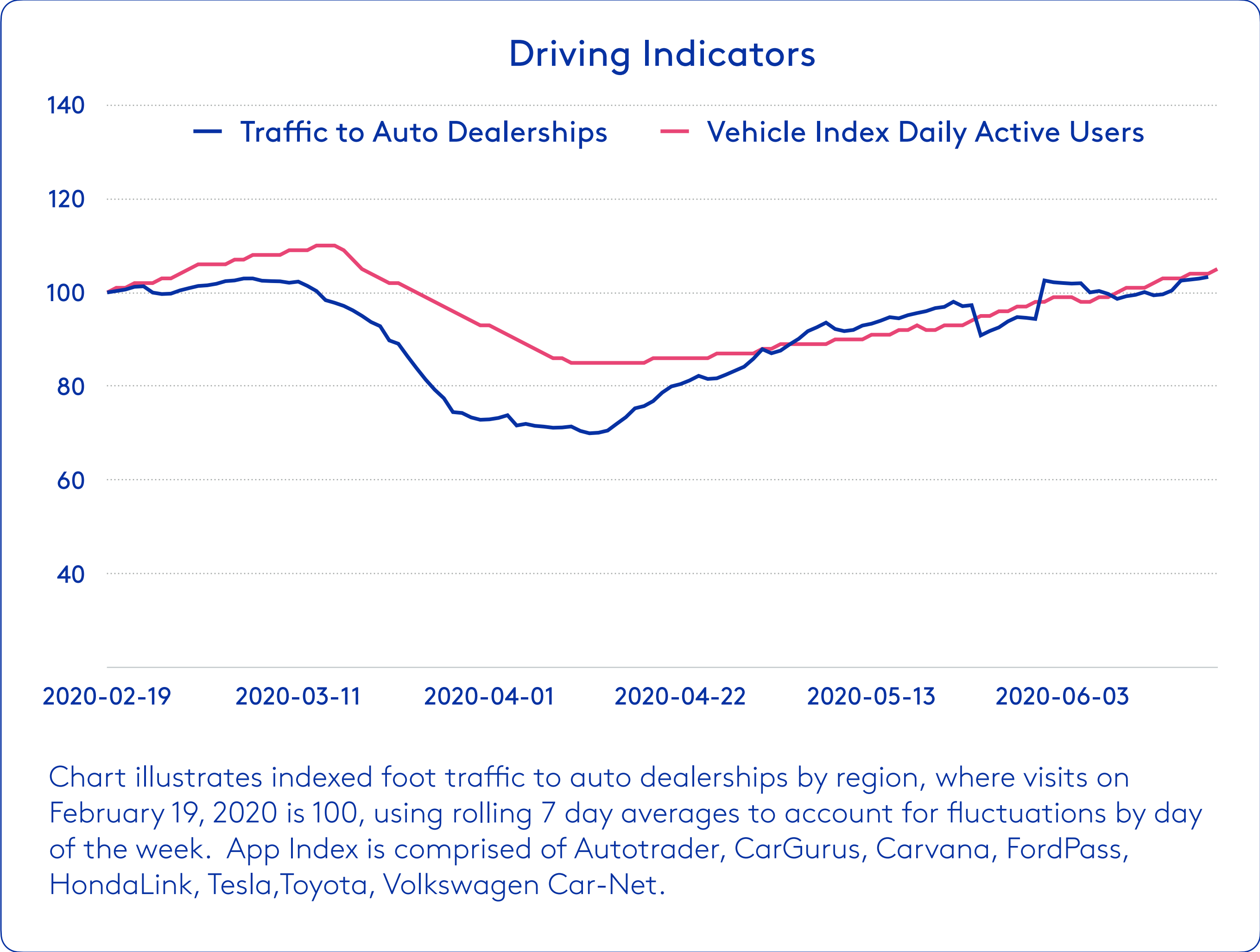
ACCELERATING: DRIVING

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

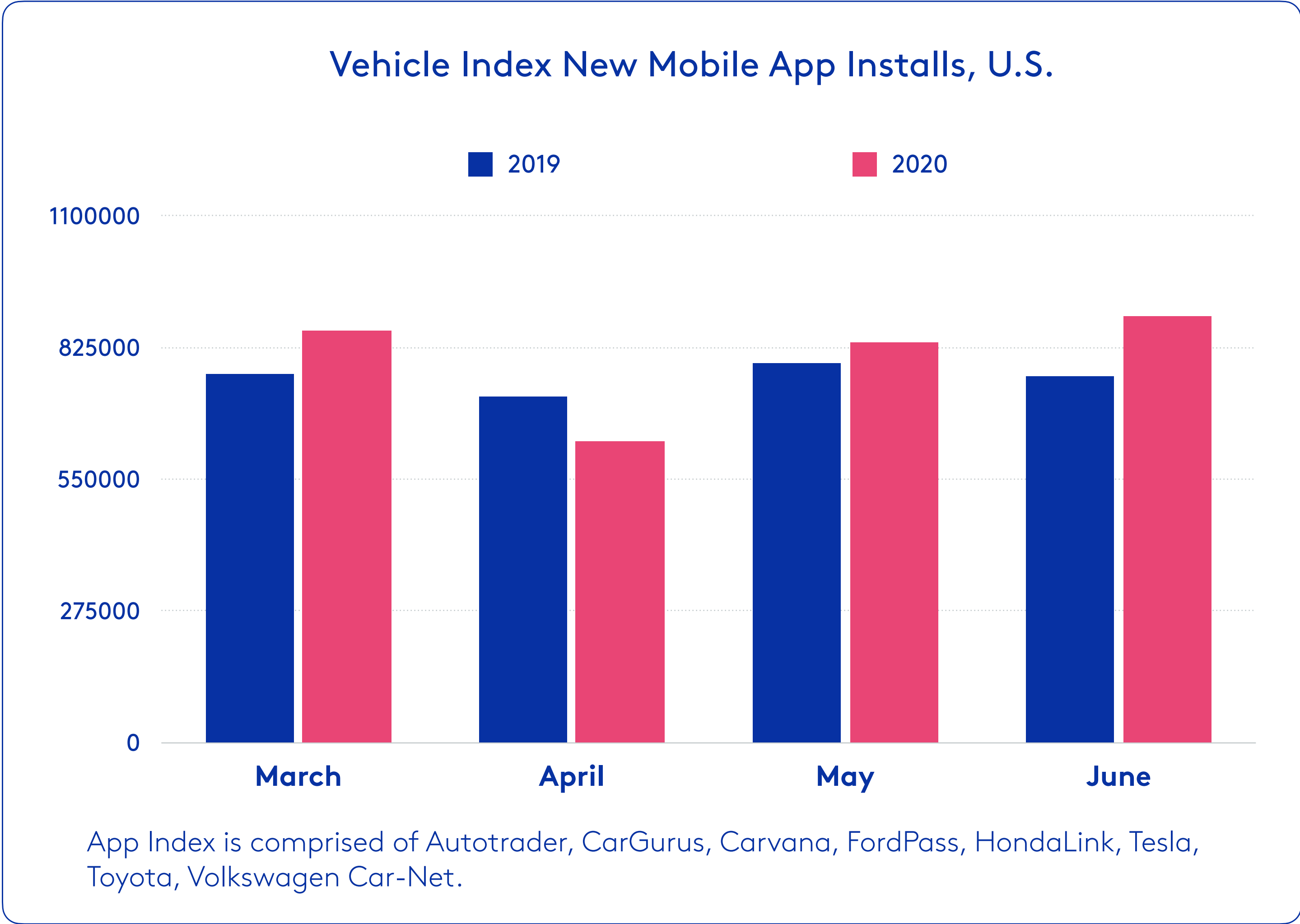




Aside from April, new user growth has increased year-over-year for apps used to shop for and purchase automobiles

- **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

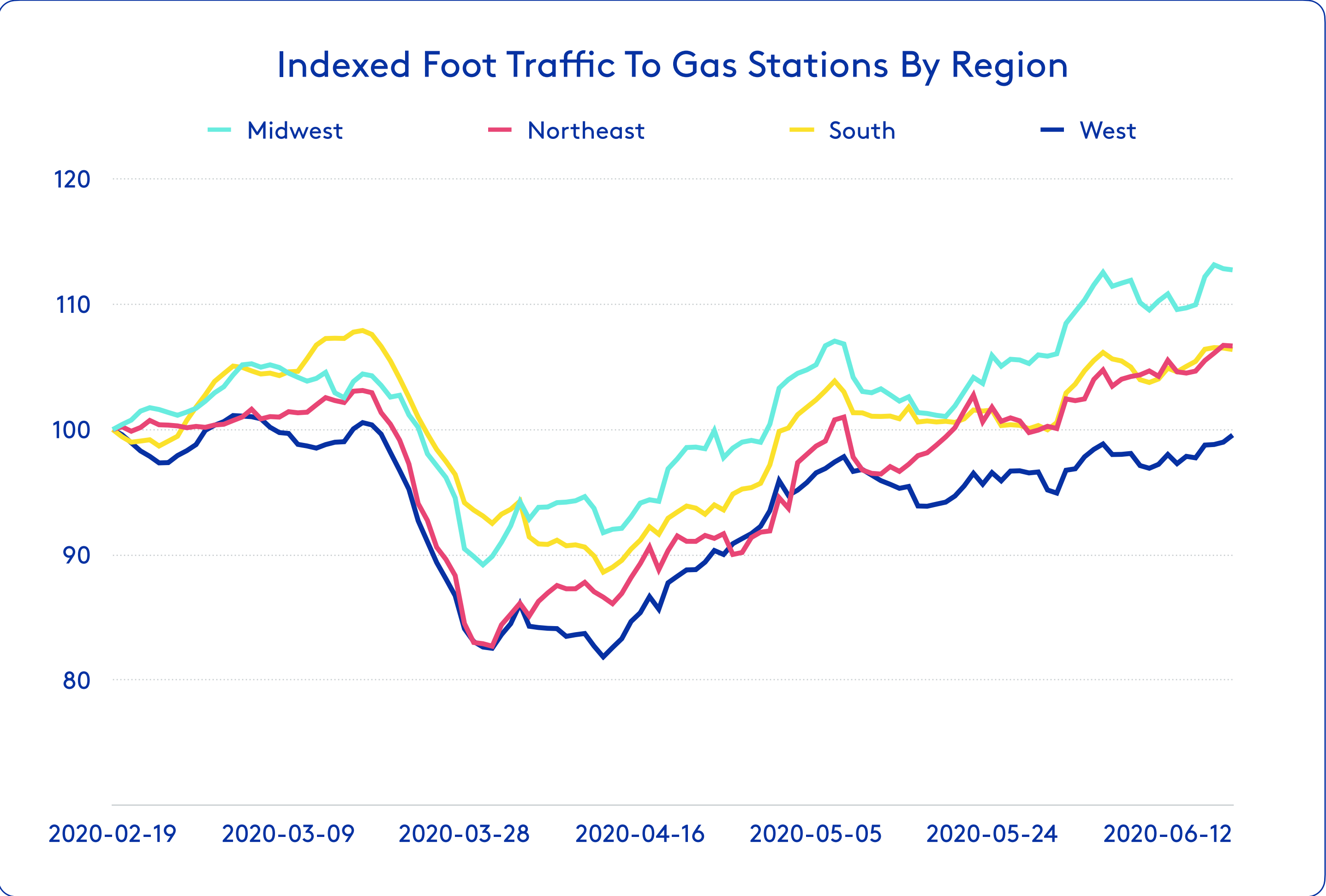


ACCELERATING: DRIVING

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.



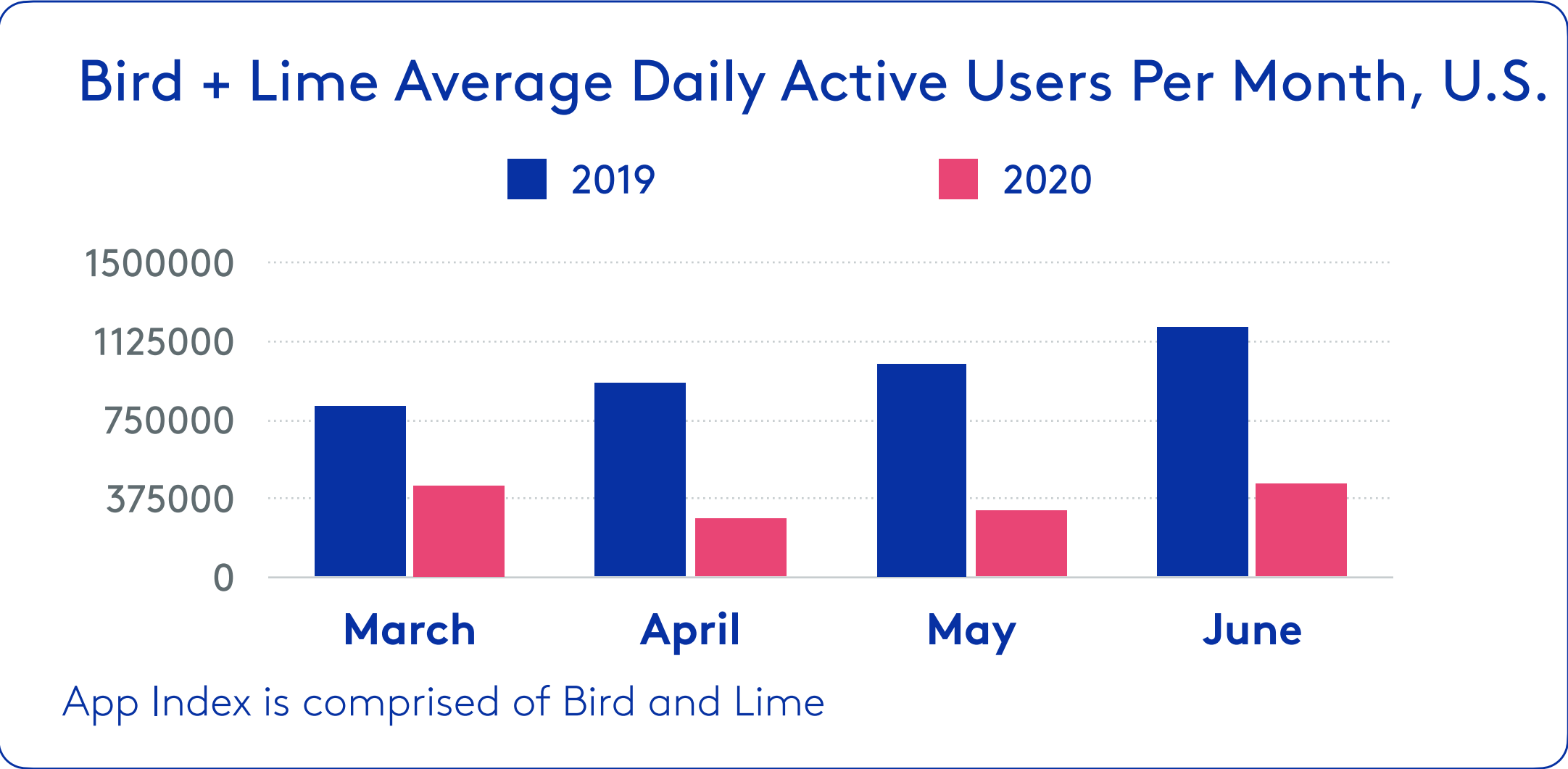
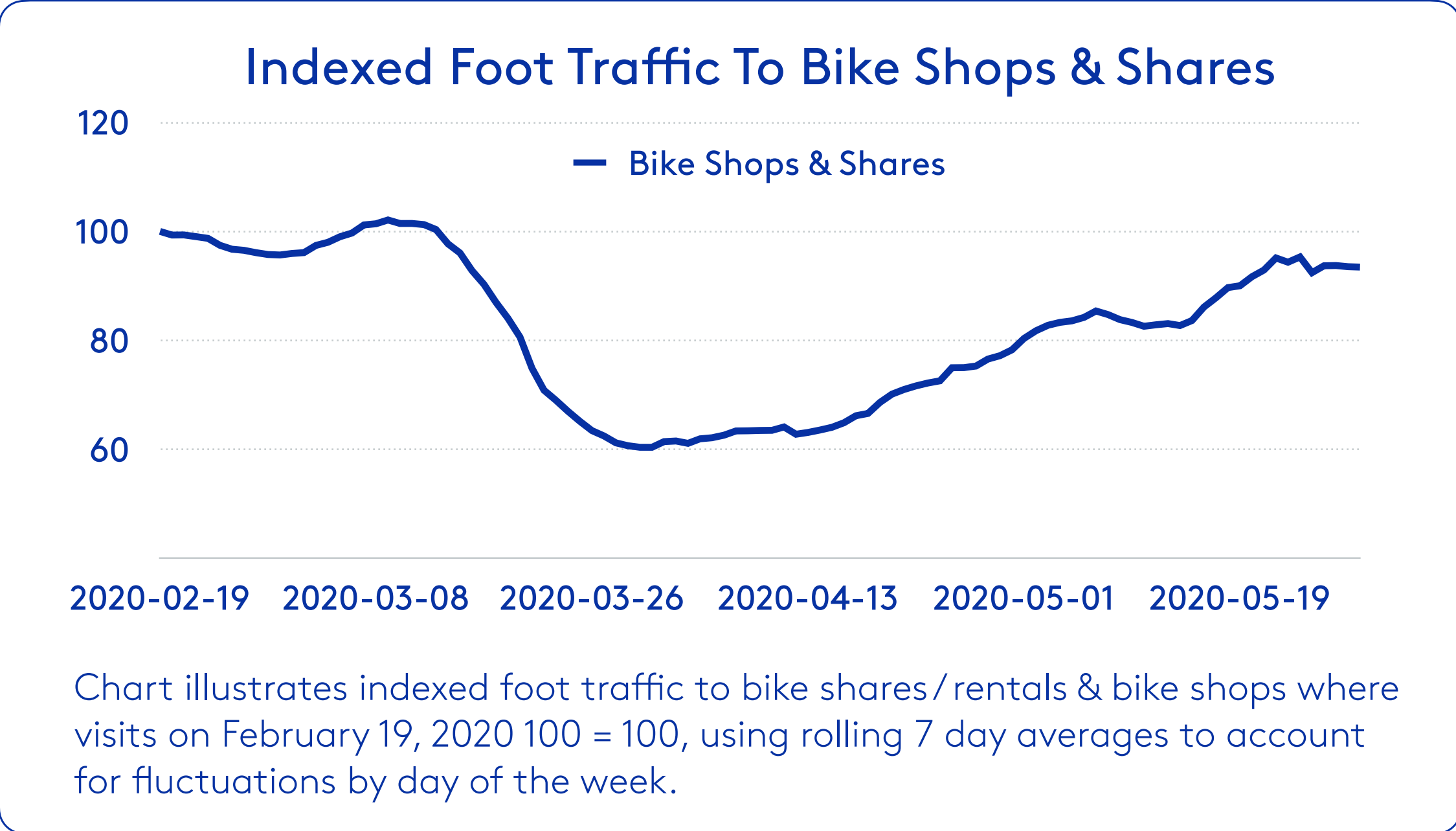
KEY INSIGHT: Visits to gas stations are up most in the Midwest (up 13%), while visits are back to roughly pre-pandemic levels in the West



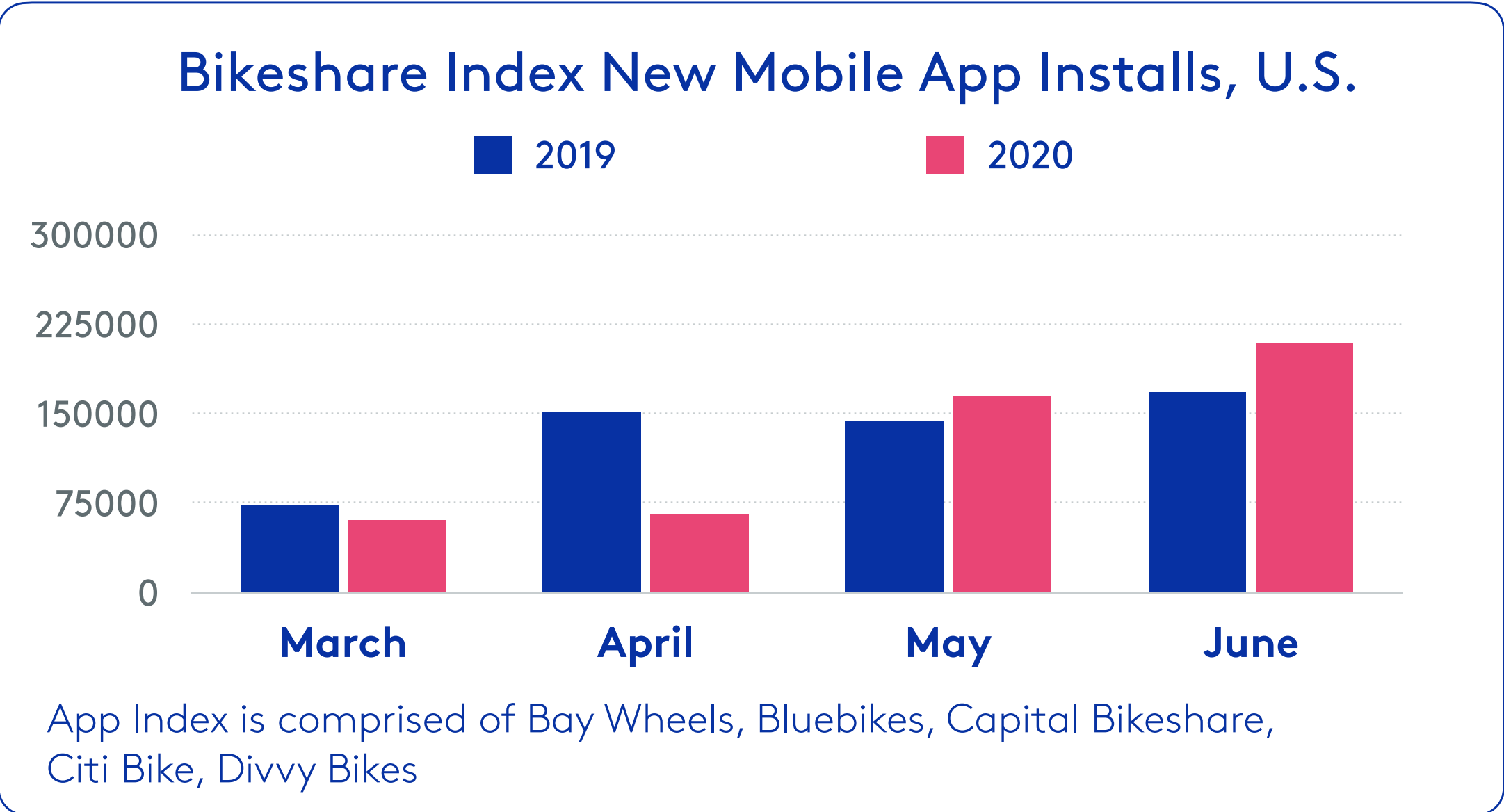
ACCELERATING: BIKES & SCOOTERS

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.



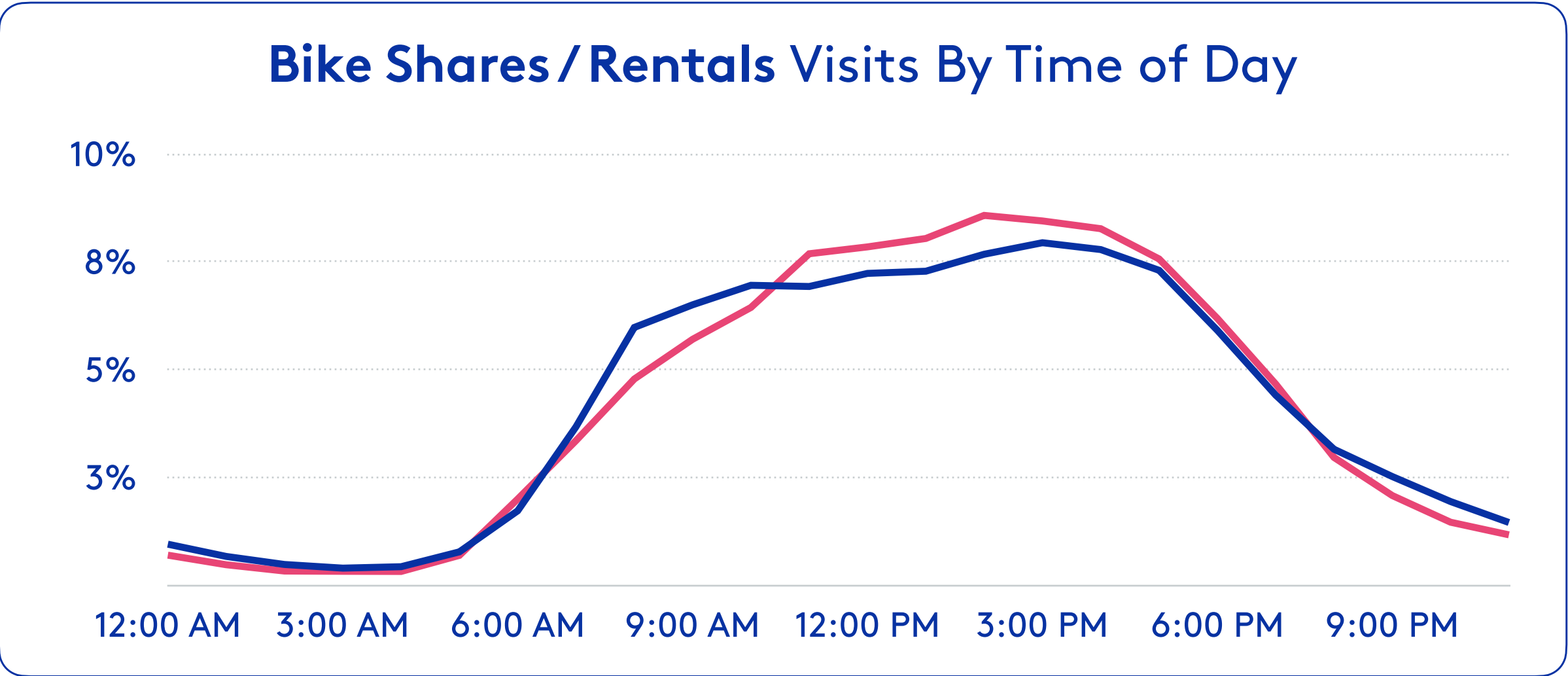
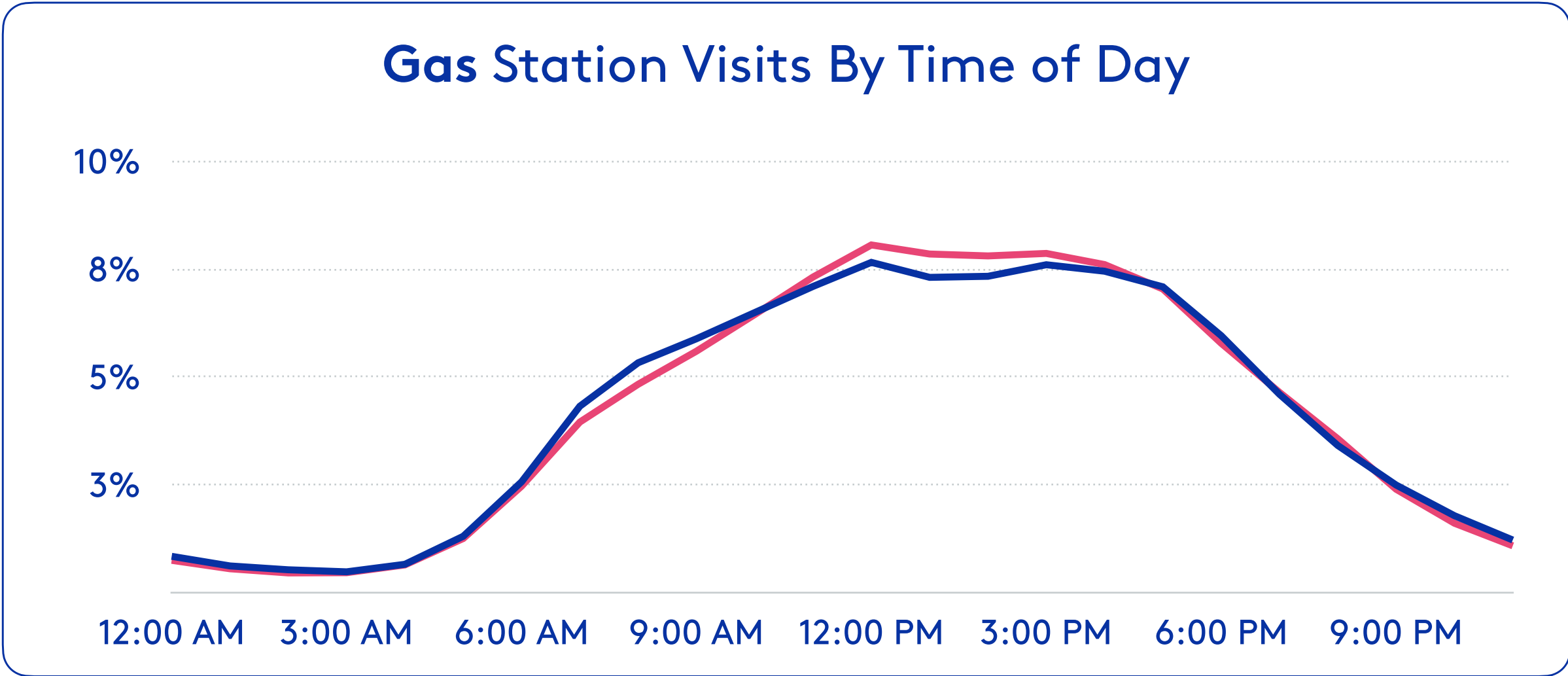
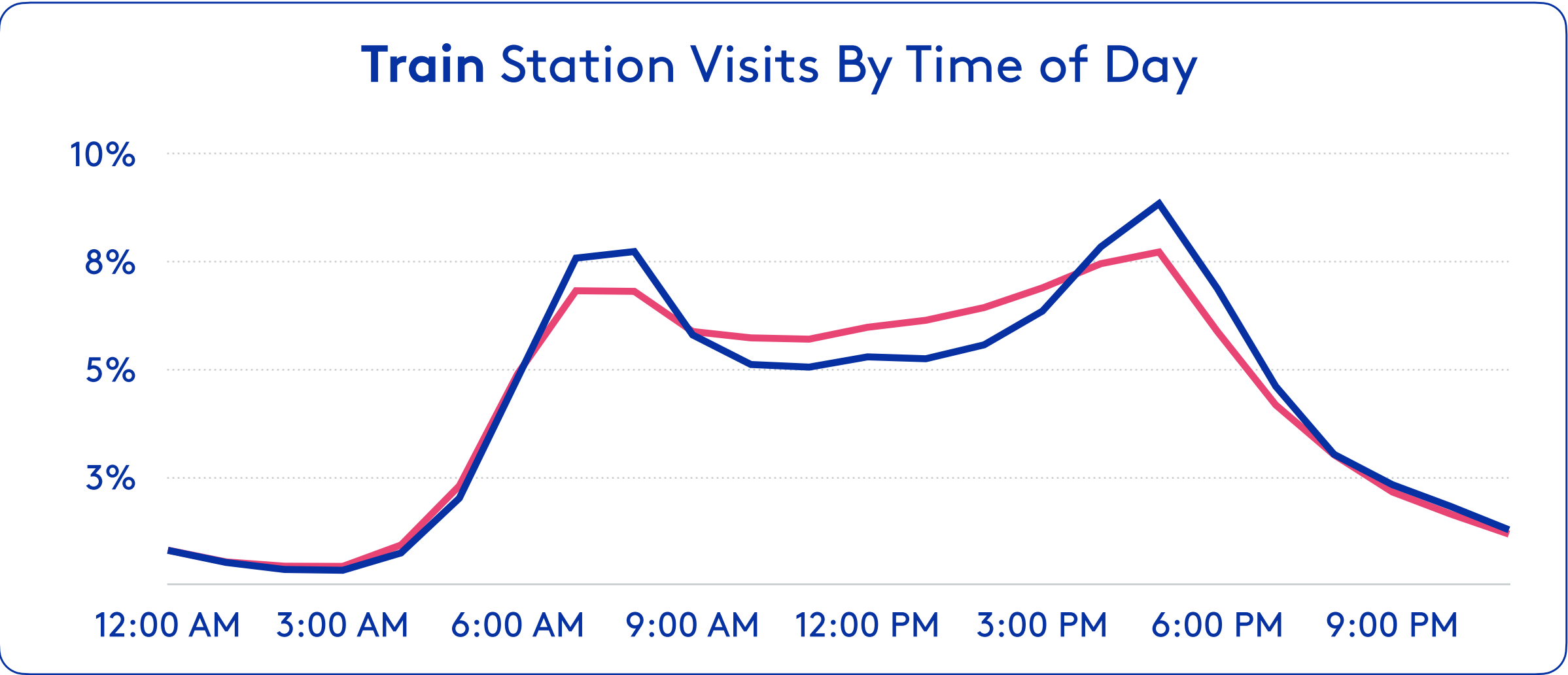
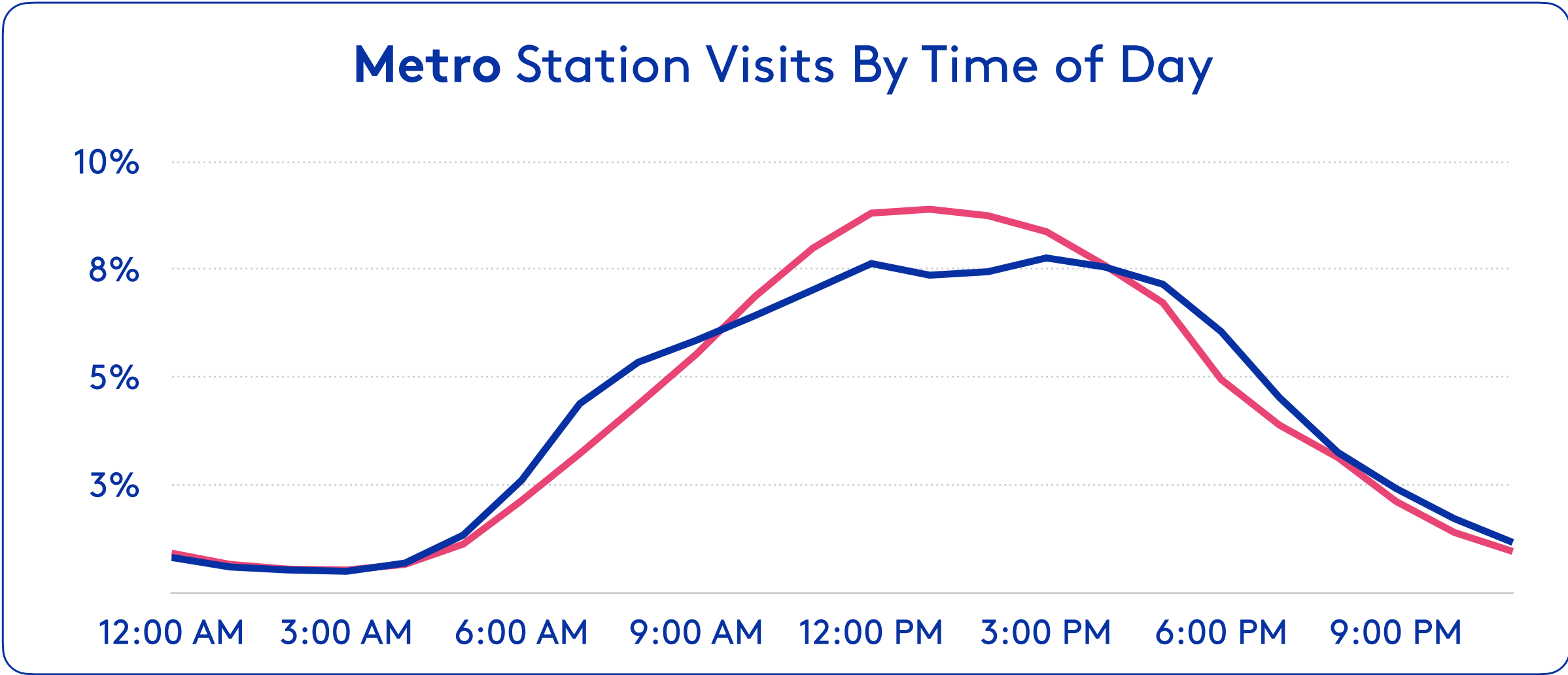
KEY INSIGHT: Scooter usage is down compared to its ceiling in 2019



KEY INSIGHT: Bikeshare providers are in higher demand this year

TIME WARP

Not only are modes of transportation changing, but also when we travel is shifting, with people out and about more midday.



Commuter Audience Profiles

METRO



COFFEE LOVERS

more likely to visit...

Coffee Shops, Peet's Coffee, Philz Coffee, Starbucks

LUXURY SHOPPERS

more likely to visit...

Bloomingdale's, Nordstrom, Saks Fifth Avenue

SPORTS FANS

more likely to visit...

Basketball & Baseball Stadiums, Hockey Arenas, Sports Bars

TRAIN



CULTURE VULTURES

more likely to visit...

Galleries, Museums, Theaters, Performing Arts Venues

HOSTS & FOODIES

more likely to visit...

Gourmet Shop, Wine Shops, Organic Groceries, BevMo!

SELF-CARE ENTHUSIASTS

more likely to visit...

Sephora, Nail Salons, Acupuncturists, Spas

DRIVE



FAST FOOD FANS

more likely to visit...

QSRs, Sonic Drive-In, Hardee's, Zaxby's, Burger Joints

FIXER UPPERS

more likely to visit...

Hardware Stores, Garden Centers, Furniture Stores

HOUSEHOLD CEOS

more likely to visit...

Big Box & Warehouse Stores, Pet Stores, Post Offices, Banks

BIKE



FREQUENT TRAVELERS

more likely to visit...

W Hotels, Hotel Bars, Airport Lounges, Marriott Hotels

ACTIVE HEALTH FOOD FANS

more likely to visit...

Nike, Cycle Studios, CorePower Yoga, Salad Places, Juice Bars

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

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

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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