NielsenIQ

Mobility in America:

Seven trends shaping the road ahead

2026 US report



NIQ Consumer Life US
November 2026

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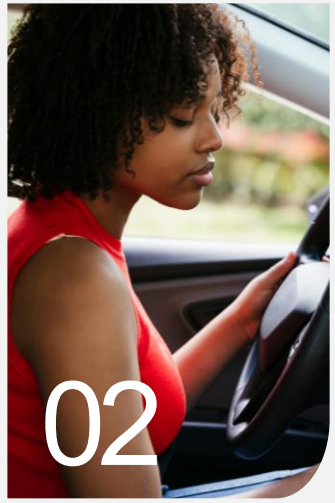
Seven trends shaping mobility needs in 2026 and beyond

Click on the image to find out more about the trend and what it means for marketers



The great slowdown

Americans are driving less as digital lifestyles encourage more home-centered routines and higher gas prices make driving more costly.



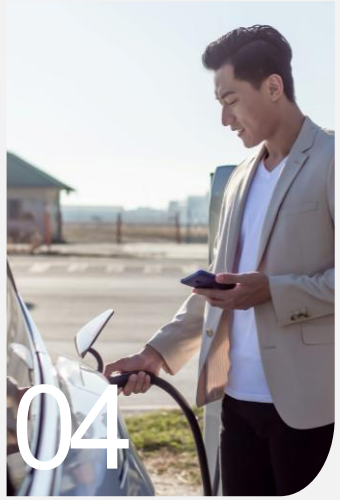
Gen Z fuels auto demand, not car culture

Gen Z is becoming a key driver of auto demand, but with a less car-centric mindset. Less passionate about driving, they tend to view personal vehicles as just one part of their broader transportation mix.



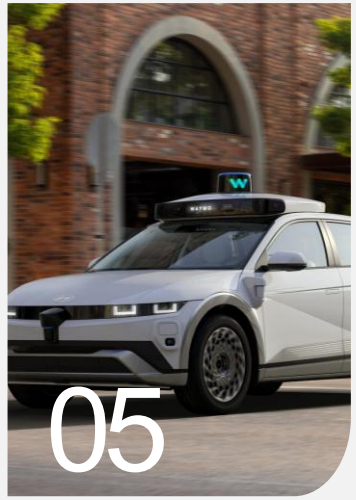
Affordability takes the wheel

Affordability has become a dominant force in vehicle purchases, steering consumers toward smaller, value-oriented vehicles. As AI becomes a gateway to shoppers in the purchase journey, success will depend not only on product competitiveness but also on visibility in AI-generated recommendations.



New engines, shifting power

Despite policy headwinds, electrification continues to gain ground amid soaring gas prices. Hybrid sales are reaching record highs, and improving EV economics, strong global demand, and growing interest among younger consumers point to an increasingly electrified future.



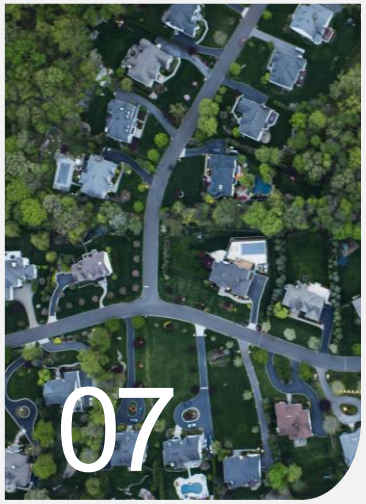
Assistance over autonomy

While growing safety concerns have tempered enthusiasm for fully autonomous vehicles, demand for driver-assistance and safety features has gone mainstream as consumers embrace technologies that empower drivers rather than replace them.



Generation Gig: the new power buyers

Nearly one in five drivers, including almost four in ten Gen Zers, are using personal vehicles to generate income through gig work. These drivers are highly engaged shoppers with distinct transportation and vehicle needs.



The new geography of growth

Domestic migration continues to favor suburbs, exurbs, smaller metros, and the South, while slower immigration reinforces the growth advantage of lower-density communities over large urban cores, remapping retail opportunities across sectors.

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01



BACK TO TRENDS LIST

The great slowdown

Americans are driving less as digital lifestyles support more home-centered ways of life and elevated gas prices weigh on drivers. Driving remains an important part of life, but physical mobility has become less structured and more discretionary than it once was.

Implications

With errands and leisure activities now far surpassing daily commutes as the leading driving occasions, vehicles that balance **everyday efficiency with long-distance versatility** are poised to strike a chord with consumers.

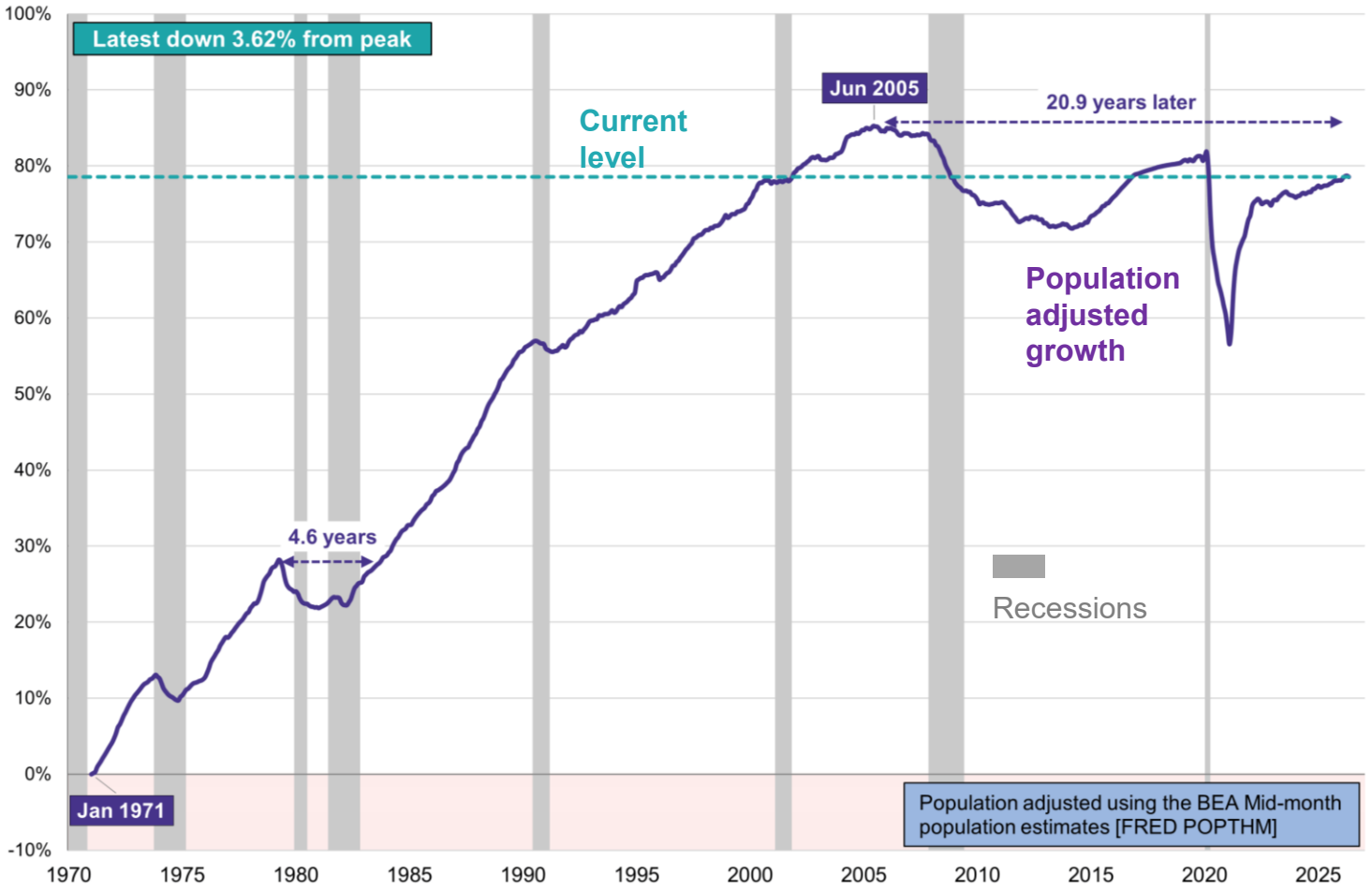
The implications extend well beyond the auto industry. Brands that help consumers **accomplish more from home or within their local communities** will be well positioned to benefit from more home-centered lifestyles.

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Americans are not driving as much as they used to

Vehicle miles traveled remained below pre-COVID levels and well below the peak reached over two decades ago despite the recent recovery

Estimated vehicle miles traveled on all US roads



When adjusted for population growth, miles traveled peaked in Jun. 2005 before its decade-long descent. The subsequent rebound was disrupted by the COVID pandemic. As of May 2026, the number remained below pre-pandemic levels and 3.62% off the peak over two decades ago.



America's Driving Habits: May 2026

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A more home-bound life is a long-term trend

The rise of the digital lifestyle pushes many routine activities home

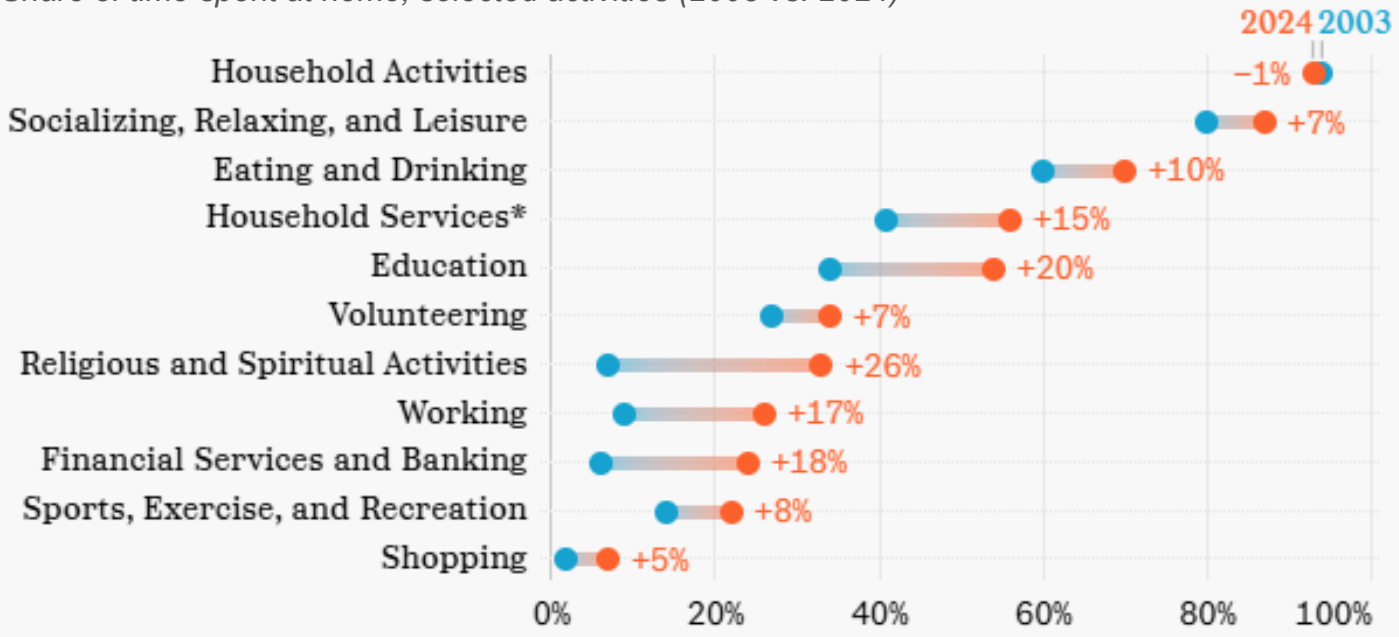
In 2003, the average American spent XX hours per day at home, according to data from the American Time Use Survey (ATUS) conducted by the Bureau of Labor Statistics. By 2024, that rose to **XX hours**, with the pandemic only accelerating the climb.

↑XX%

Time spent at home 2003-2024

More of our routines are done at home

Share of time spent at home, selected activities (2003 vs. 2024)



Increasingly, virtual over physical mobility

% of American consumers citing the following as the last thing they would give up if they had to cut back on expenses



Population aging has contributed to the rise of a more home-bound America, but the more powerful long-term force is the shift toward a digital lifestyle, accelerated by the COVID-19 pandemic. Compared with two decades ago, Americans are far more likely to work, socialize, shop, bank, and entertain themselves from the comfort of home. The growing importance of virtual vs. physical mobility is also reflected in the fact that mobile phones are widening the gap with driving as the last thing that Americans would let go.

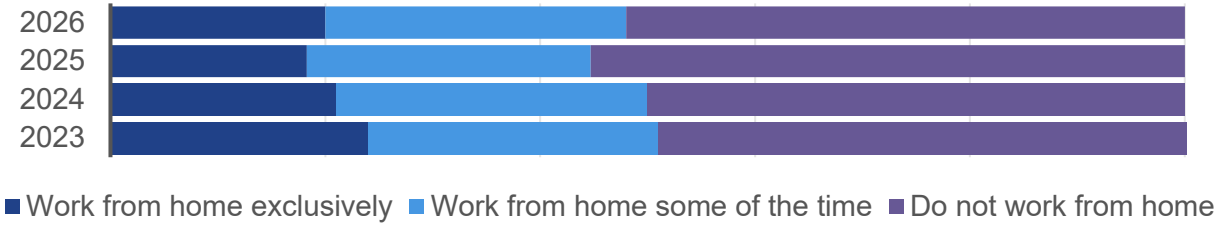
Home. Alone, NIQ Consumer Life US 2010, 2013, 2016, and 2025 A09

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One in two workers now telecommute at least some of the time

Hybrid arrangements show remarkable strength

Work arrangement (%, among employed American consumers)

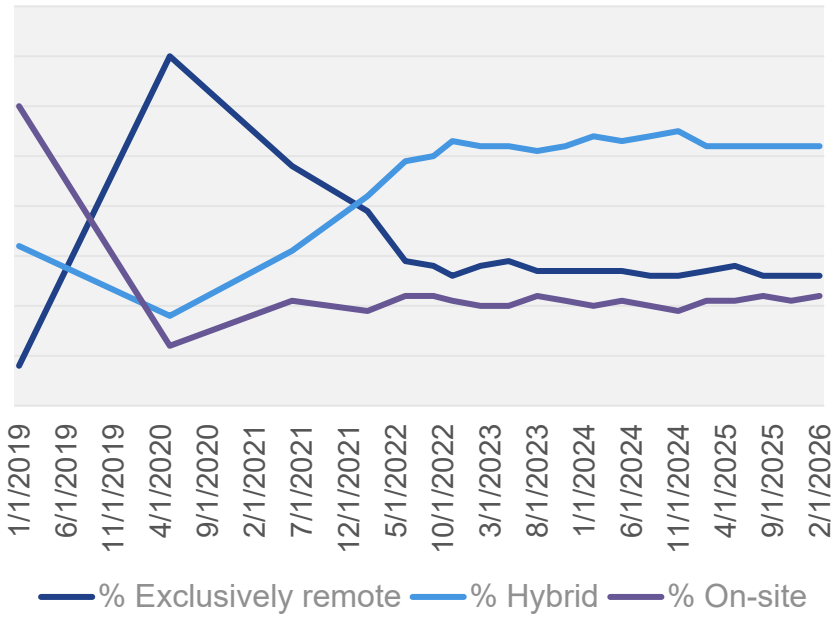


%, among employed American consumers	Work from home exclusively	Work from home some of the time	Do not work from home
Male			
Female			
Gen Z			
Millennials		■	
Gen X			■
Boomers			
HHI < $50K			■
$50K-$99.9K			
$100K-$149.9K			
$150K+	■	■	
Salaried job (regular schedule and pay)		■	
Wage job (paid only for hours worked)			■
Freelance/independent contractor	■	■	
Own business	■	■	

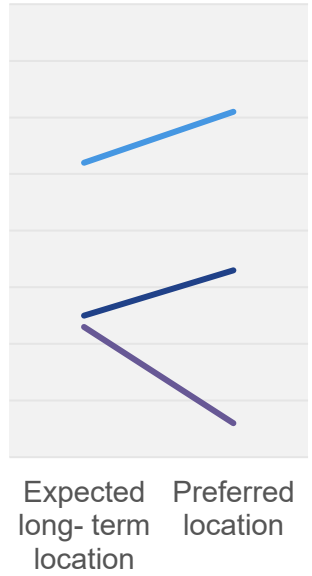
■ Notably higher than among other segment(s)

Office occupancy rates increased in the first three months of 2026 but remain well below pre-COVID levels, averaging around 54% of pre-pandemic levels. As of early 2026, the majority of remote-capable employees are currently working in a hybrid (52%) or exclusively remote arrangement (26%), with 22% working on-site. Future expectations and preference suggest that telecommuting will remain popular in coming years.

% of remote-capable employees working (or expecting or preferring to work) at each location



Future Locations and Preferences



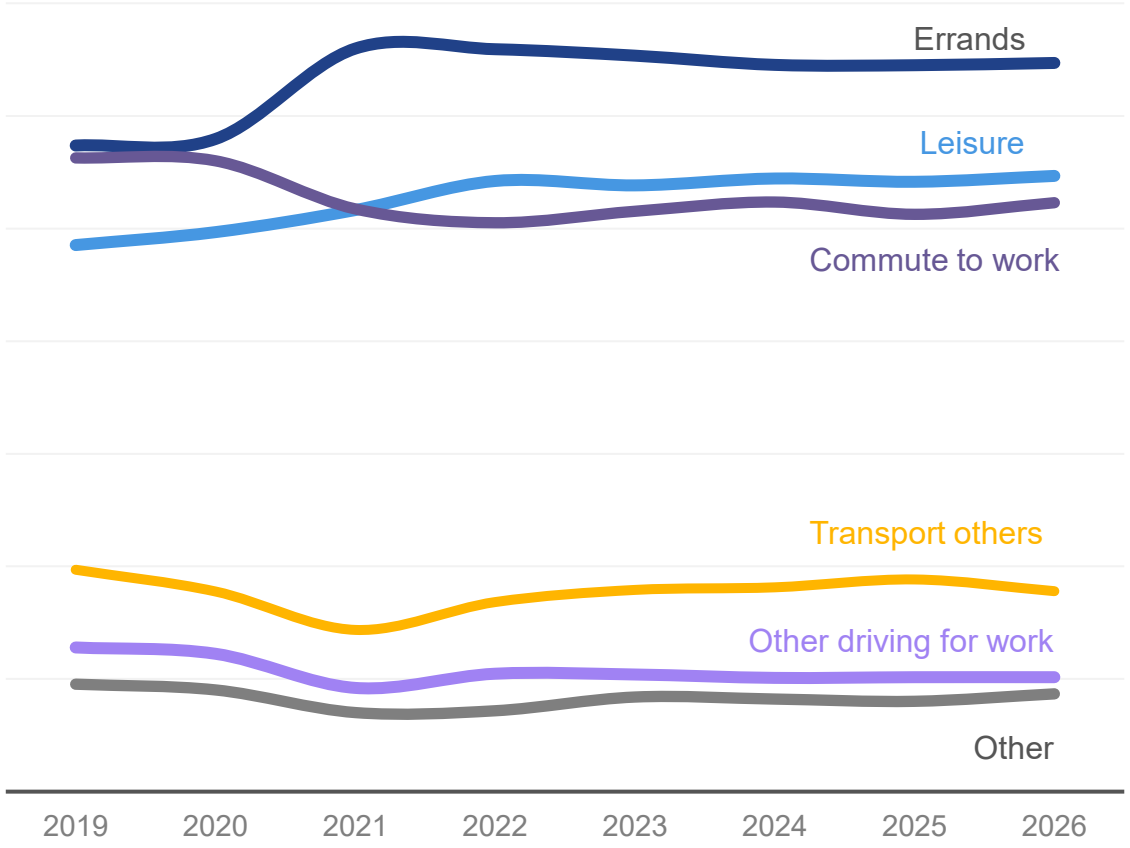
NIQ Consumer Life US 2023-2026 demo, P53, Where Do U.S. employees with remote-capable jobs do their work?

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A notable shift in why Americans drive

Errands and leisure have emerged as the top reasons for driving, ahead of daily commute

% of American consumers citing the following as the primary reason that they personally drove in the past 12 months, among drivers



MRI 2019 and 2020 Spring, MRI-Simmons 2021-2026 Summer





02



BACK TO
TRENDS LIST

Gen Z fuels auto demand, not car culture

Gen Z is becoming a major force in the auto market, but with a fundamentally different relationship to transportation. At the forefront of a long-term shift toward a more practical view of cars and driving, they are more likely to blend public transit, ridesharing, biking, and other alternatives into a broader mobility ecosystem.

Implications

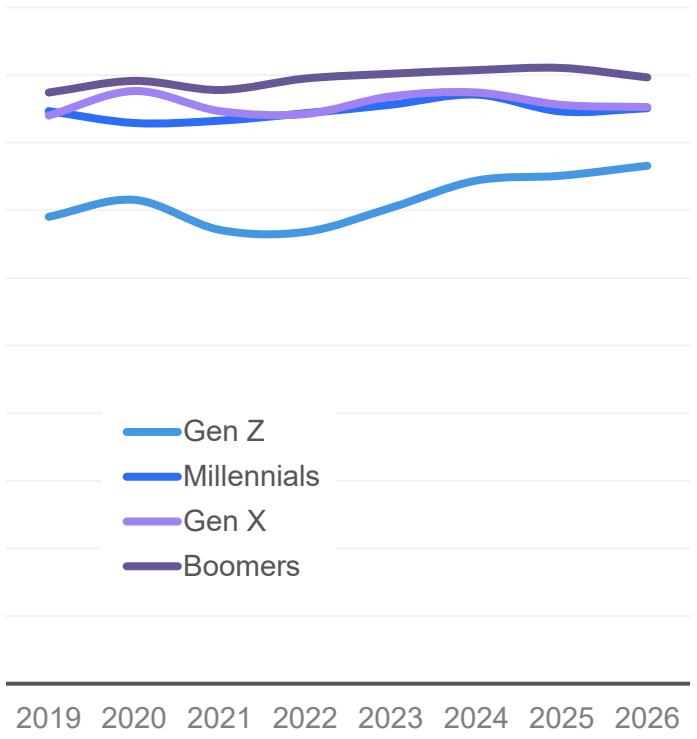
Gen Z has finally arrived in the auto market, but messaging that resonated with previous generations of young buyers may not be as effective with this cohort. Appeals centered on the **thrill of driving are likely to carry less weight**. As Gen Z embraces a more **multi-modal** approach to transportation, automakers, cities, insurers, and mobility providers should consider how personal vehicles fit alongside transit, ridesharing, e-bikes, and other mobility options.

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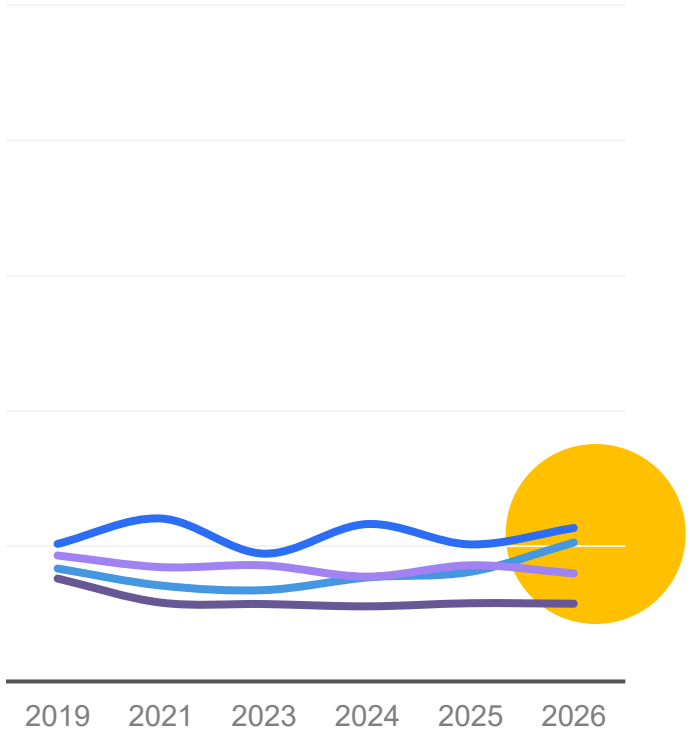
Gen Z emerges as the driving force in the auto market

While Gen Z adults are still catching up with older generations in driving, they already rival Millennials as the most in-market generation for auto purchases

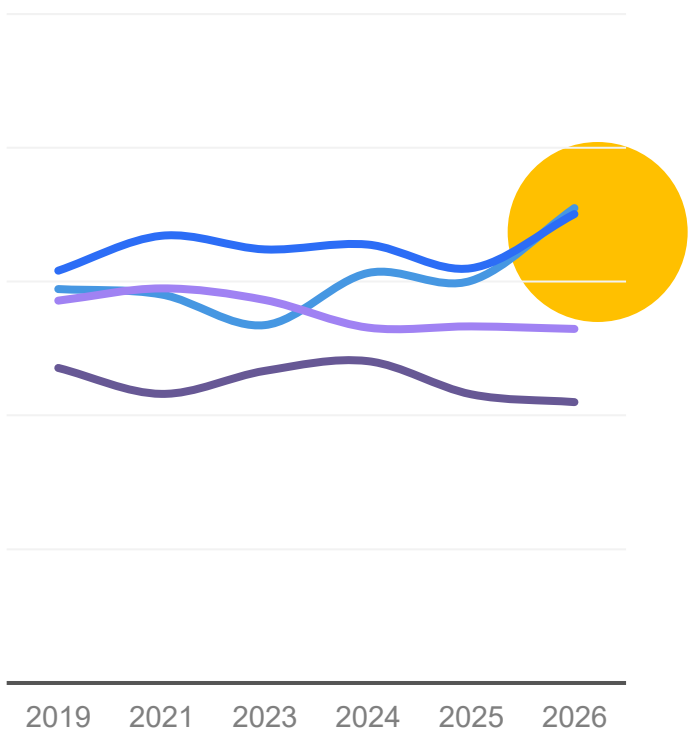
% of American consumers who drive household vehicles



% of American consumers who plan to purchase vehicles in less than a year



% of American consumers who plan to purchase vehicles within three years



NIQ Consumer Life US 2019-2026 D1, D2, D9

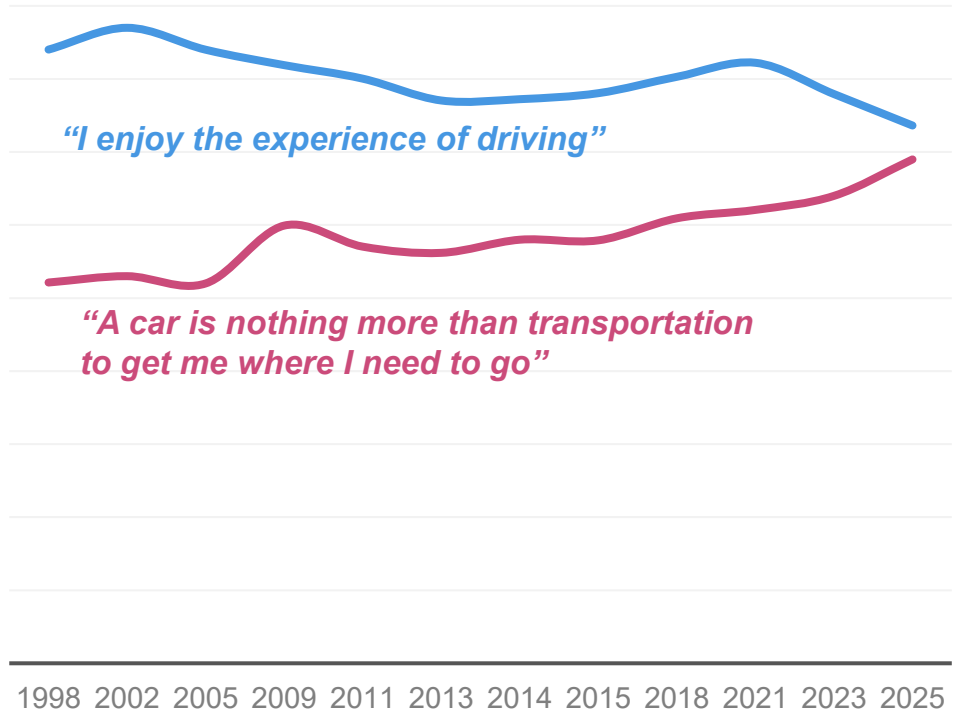
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Growing adoption ≠ Rising passion

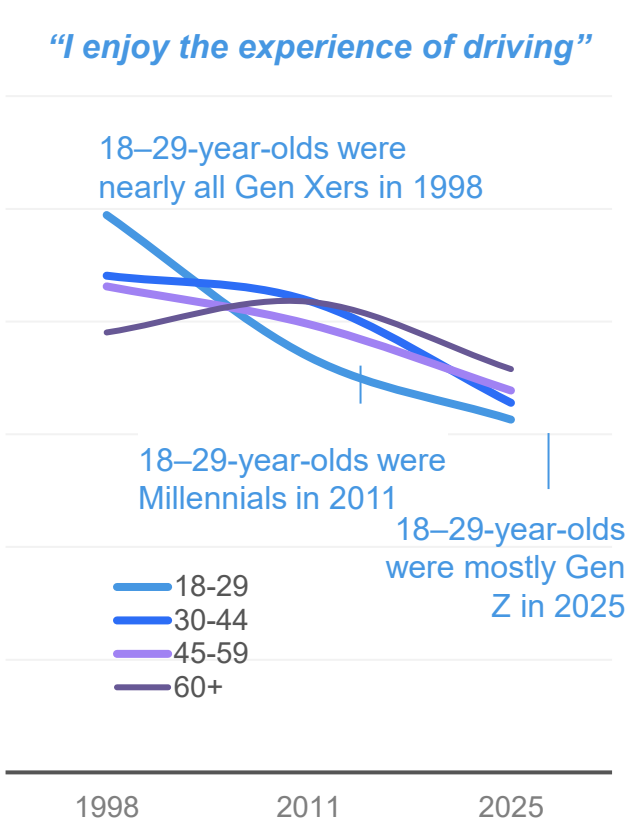
Gen Z and Millennials drive a long decline in emotional ties with cars and driving

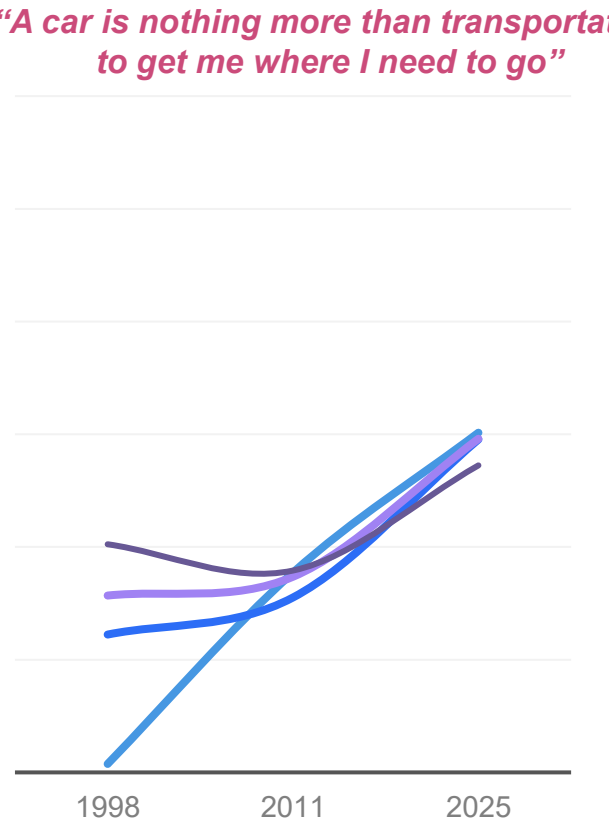
Passion towards driving hit a record low as a more practical view about cars reached a high

% of American consumers who agree with the statement



The shifts have been the sharpest among young adults. In the late 1990s, young Gen X adults were more passionate about driving and less likely than older Americans to see cars as mere transportation. It has been the other way around for Gen Z and Millennials.





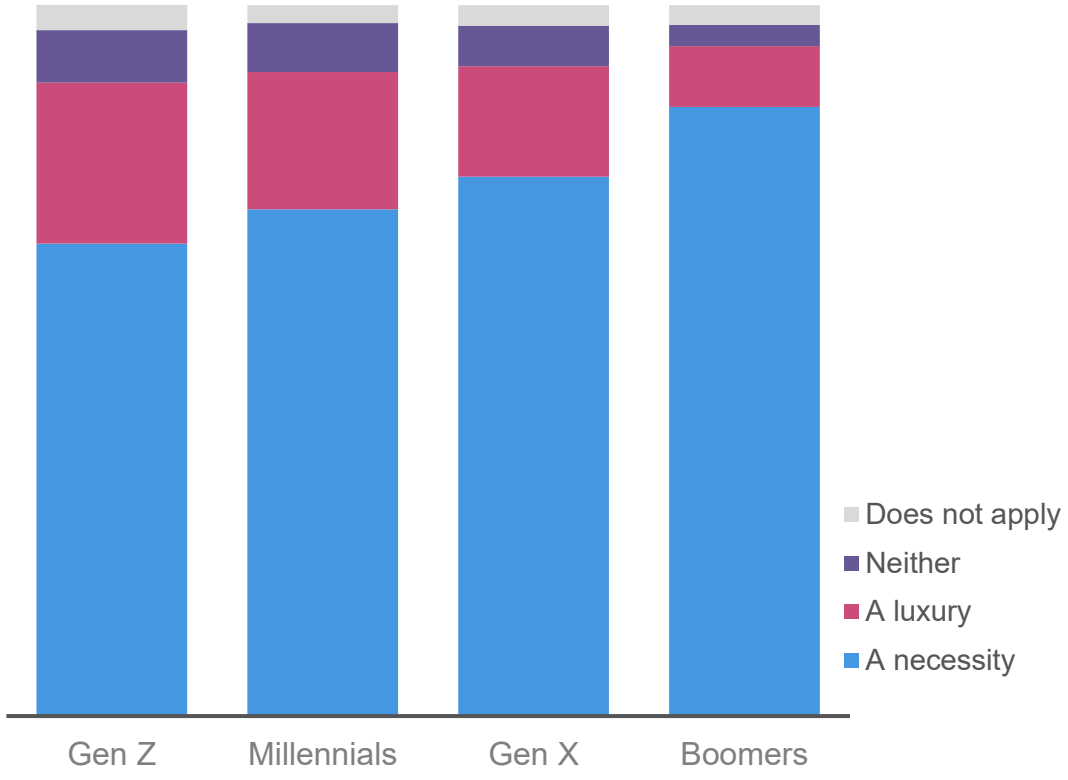
NIQ Consumer Life US 1998-2023, NIQ Consumer Life Global 2025 D12 (US filter, age 18+)

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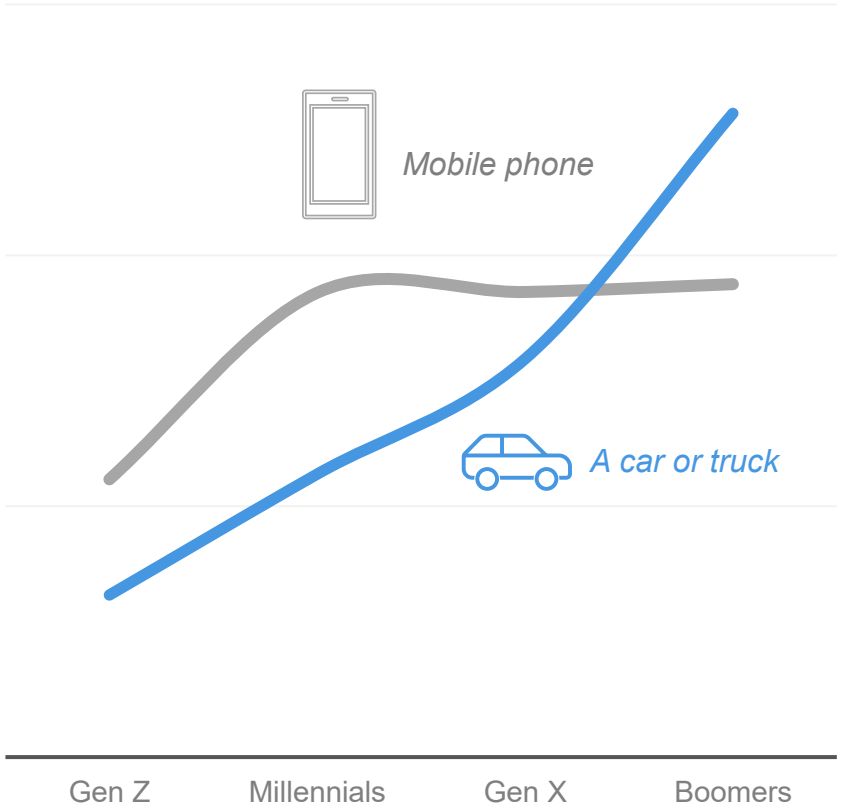
Despite rising adoption, Gen Z is more likely to view private vehicles as a luxury vs. a necessity

Younger generations tend to consider virtual mobility as more fundamental than physical mobility

% of American consumers saying a car or truck is…



% of American consumers citing the following as a necessity



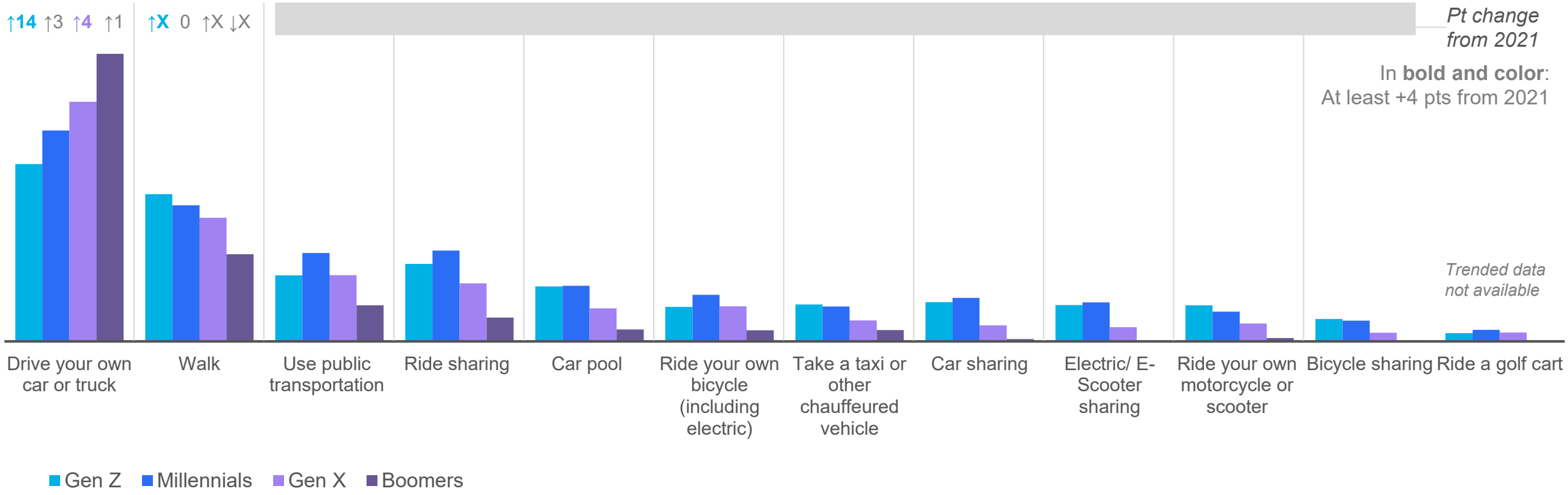
NIQ Consumer Life US 2025 B47

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Gen Z helps fuel the rise of multi-modal transportation

Among Gen Z, use of alternative forms of transportation rises along with driving private vehicles

% of American consumers who currently use the following forms of transportation



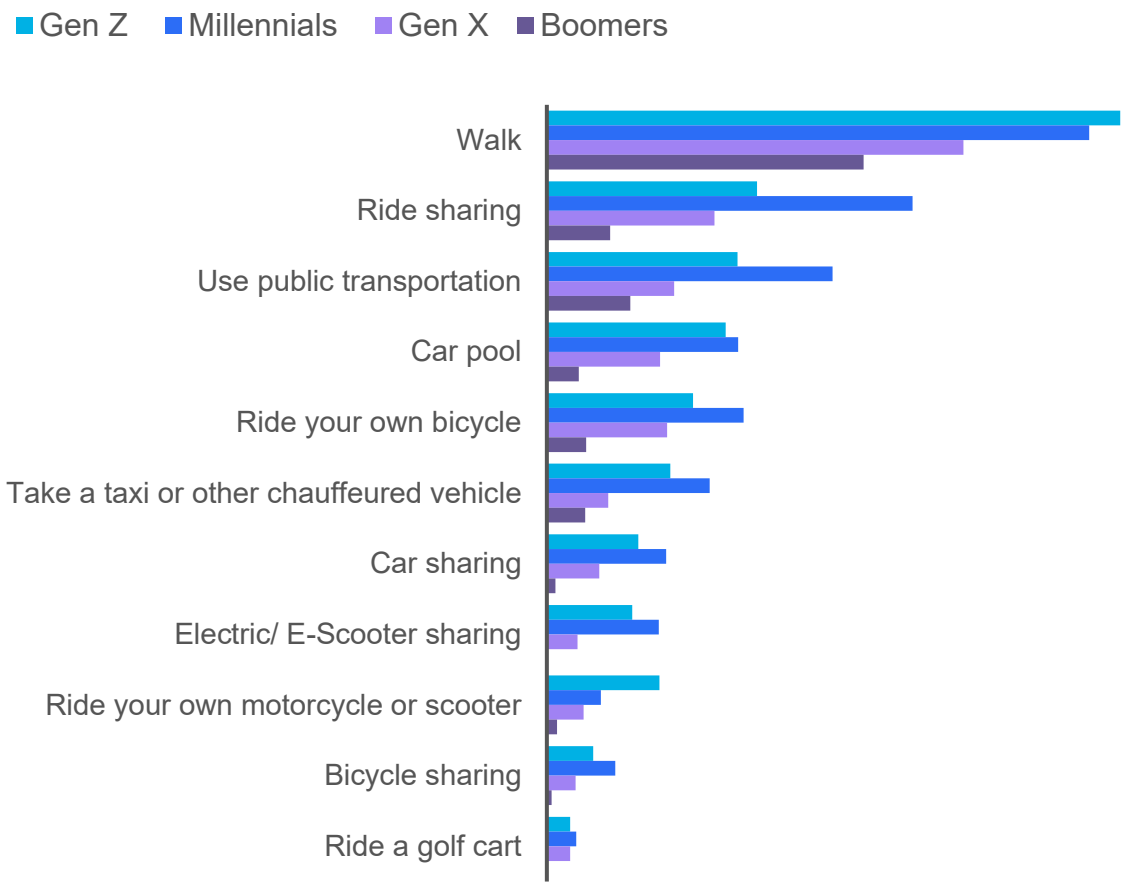
NIQ Consumer Life Global 2021 and 2026 D5a (US filter)

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Mobility goes well beyond private vehicles for younger generations, even among drivers

Gen Z and Millennial drivers are more likely than their older peers to tap into alternative forms of transportation

% of American drivers who currently use the following forms of transportation*



NIQ Consumer Life Global 2026 D5a (US filter), *Those who drive their own cars or trucks as a current form of transportation



Gen Z leads on the interest in micromobility solutions

A quarter of Gen Z adults are interested in purchasing 2-wheelers

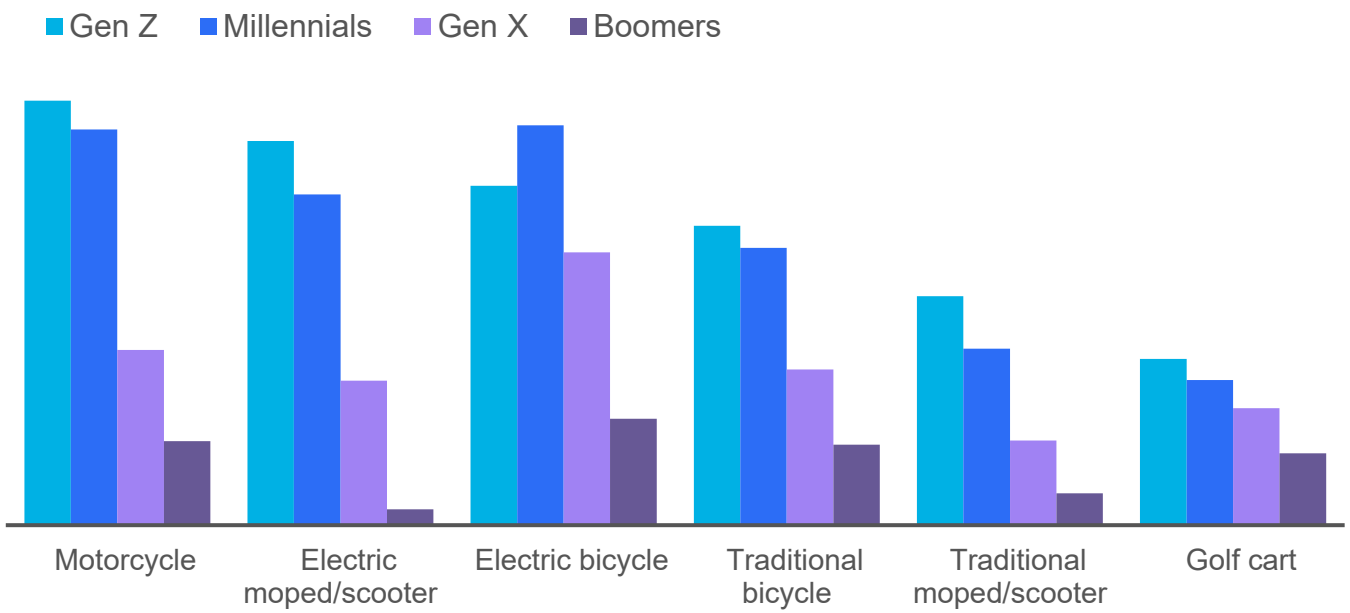
XX%

of Gen Z adults are seriously considering buying 2-wheelers* in the next three years

Compared with

XX% of Millennials
XX% of Gen X
XX% of Boomers

% of American consumers seriously considering buying the following in the next 3 years



Micromobility meets tighter regulations

Governments across the nation are tightening regulations on e-bikes and electric scooters to address rising street accidents, "stunt" riding, and fire safety hazards.

For example, a new law taking effect in Oct. 2026 in California bans manufacturers and retailers from marketing or advertising any vehicle as an "e-bike" if it lacks pedals, exceeds 750 watts, or travels faster than 28 mph. Local municipalities are also passing ordinances to control where and how fast micromobility devices can travel.

This shift signals a maturing micromobility market. As regulatory frameworks become more established, manufacturers and retailers face higher compliance requirements, but the changes may also improve consumer confidence, promote safer products, and create clearer distinctions between legal e-bikes and higher-powered vehicles.

NIQ Consumer Life US 2026 D43, *net of motorcycles, electric mopeds/scooters, electric bikes, traditional bikes, and traditional mopeds/scooters,
Gavin Newsom signs bill distinguishing e-bikes and e-motos in California, New e-bike rules adopted in Orange County, Michigan communities tighten e-bike rules as crashes raise safety concerns

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