#### **MOVIN'ON MOBILITY SURVEY**

powered by **KANTAR** 

### NEW GENERATION'S VIEW ON THE FUTURE OF MOBILITY IN A (POST)-COVID WORLD



## Post-COVID mobility and lifestyles: What changes do 18-34 year olds want to see?

With the pandemic limiting mobility, young urban dwellers aged 18-34 are keen to change their mobility habits and, more generally, their lifestyles.

Movin'On, the world's leading ecosystem for sustainable mobility, presents the results of a survey conducted by leading market research partner Kantar among young, urban and environmentally committed students and working people (18-34 years old). The results of this qualitative survey constitute a trend book, which provides some keys to better understand the challenges of tomorrow's mobility as seen by these young generations.

With the support of five of its members - Accenture, CGI, Kantar, Michelin and Microsoft - Movin'On led a survey to understand how this unique health crisis leading to months of lockdown and restrictions has impacted young people's mobility, desires and expectations. Involving the younger generation is an essential part of Movin'On's collective strategy.

These 18-34 year old urban dwellers project themselves into a new kind of post-COVID mobility. More pragmatic than idealistic, they do not reject any means of transportation and still dream of cars, as long as they are clean. They have adopted new mobility habits with COVID and intend to keep them, even if this means adapting their lifestyle. They want "hybrid mobility" where different modes of transportation, as well as work and private life, are no longer opposed. For this change to happen, they understand that companies and public authorities need to collaborate, and they intend to be part of this process.

FOUR major insights emerged from this qualitative survey conducted in Europe and North America.





## **GEN Z is more pragmatic** than idealistic.

Refusing to reject any means of transportation including the car, they are the first truly multi-modal generation.

Committed, but not utopian, the young respondents seek first and foremost to meet their needs in terms of convenience and cost. Then they naturally value modes of transport that pollute less and are more inclusive. This means public transportation - even if they are not fully satisfied by the experience - and shared mobility. However, they remain just as attached to the idea of owning a car as

previous generations, provided it is clean.

These digital natives are the first generation to fully embrace multimodality. They want all means of transport. They have the appropriate mindset, easy access to various modes of transportation, the agility to choose the right one for the right occasion, and the willingness to be game changers.



I use my car and streetcar. I stop my car at a streetcar stop and finish the journey with a streetcar, so I don't have to park and it's faster. I'm quite focused on creating less waste and eating better. However, for everything that is transportation, I do it more for convenience than to care for the environment. **Nantes** 



When travelling, young people use the means of transportation that is most convenient and matches their budget. Sustainability comes next: pragmatism over idealism.

They are the generation that uses public transport most. But they are not blindly satisfied. They call for drastic improvement in the service, meaning more comfort, better quality time while travelling, better interconnection with other means of transport, and, in North America, cheaper prices.

Public transport accounts for 31% of the transport used by GenZ, compared with 25% for GenX and beyond.

They remain just as attached to the idea of owning a car as the previous generations. But they want it to be clean.

32% of Gen Z and 38% of GenY consider that owning a car is an important step in their lives (versus 34% for GenX and beyond).

More than 36% of 18-34 year olds will definitely or are very likely to buy an EV (compared to 16% for the previous generation).



The car is expensive, for sure, but the car is essential with the children etc. I know that in a year, I will switch to an electric car. If you're addicted to cars like me, it's still the best compromise on the carbon footprint. **Nantes** 

These digital natives are able of choosing the best compromise for their mobility needs, including their budget and commitment to the environment. They are always looking to optimise their trip, establishing a smart balance between duration, practicality, cost and sustainability, taking advantages of all available possibilities.

61% of Gen Z and Y use shared mobility applications, compared with 27% for Gen X.



## THE GEN Z, A GENERATION MORE PRAGMATIC THAN IDEALISTIC

Rising multimodalists, looking for efficiency and positive impact

#### **NATIVE DIGITALS!**



Using twice more mobility apps (public transport, car sharing, bike sharing) than Gen X

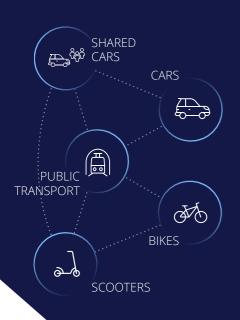
### BETWEEN THEIR NEEDS AND WHAT THEY VALUE

Once the basics are addressed

49%	Punctuality 🧭
48%	Quick to destination 🕣
46%	Convenience

#### **MULTIMODALISTS**

#### **GEN Z VALUE MUCH MORE VERSUS GEN X**











#### WHO STILL WANT A CAR, BUT A GREEN ONE!

32%

think that **owning a car** is an **important stage in life** (vs 34% for Gen X)

40%

**feel delighted** when using a car (vs 24% for Gen X) - In North America

36%

will definitely or very likely **buy next** car as **100% EV** (vs 16% for Gen X)

### COVID has hindered mobility.

## But it has also accelerated trends like chosen mobility, bike use, walking and clean cars.

The protective reflexes that have emerged with COVID have not spared this generation - less out of fear for their own health than for the sake of more fragile loved ones. This has resulted in a return to individual modes of transportation and a growing mistrust of public transport.

But COVID has also been a trend accelerator with an increase in bike usage and walking, both of which have many arguments in their favour: an

outdoor physical activity that is cheap and sustainable with health safety benefits.

Beyond the means of transportation, the pandemic has accelerated the transition to a less constrictive and more chosen kindofmobility. This means reconsidering whether you need to go to the office every day, limiting unnecessary travel - and therefore adapting transportation modes - and living more locally.



I will keep biking more in the future. The Citi Bike system in NYC is really accessible and efficient - and fun! Increased bike usage has probably been my biggest and most welcome travel adjustment. **NYC** 



Anxiety due to COVID and the sense of responsibility that this generation feels towards its fragile loved ones has resulted in a return to individual modes of transportation and a growing defiance towards public transportation. The car has become more attractive, particularly in North America (with COVID-related car purchases). Beyond freedom, safety and convenience come first.

Only 7% are "delighted" when using public transport, compared to 20% for bicycles and 27% for cars.

This generation's love/hate relationship with public transport has been amplified in the COVID context. Given that it is affordable and contributes to a more inclusive and greener society, it should be the preferred mode for young people. But it suffers from negative user experience (service, cleanliness and safety), accentuated by COVID.



Why take the public transport when the bike is faster and more convenient. **Paris** 

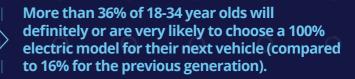
On the other hand, COVID has also been a trend accelerator, giving rise to an increase in bike use and walking. Bike were encouraged by COVID19 infrastructures like "pop-up" bike paths in cities, and subsidies in Paris. Cycling and walking have a lot going for them including being an open-air physical activity and a cheap and sustainable form of transportation.



Living car-free has been a revelation to me. It has allowed me to be more active and ecoconscious, feel a greater purpose, and change my values. I am an avid supporter of walkable cities, good urban design, and public transit development. Montréal



As for the car, the move towards clean cars is accelerating. Young people recognise the value of having a car, but it must be clean - hybrid or electric.



COVID was a moment for them to take stock and rethink their mobility to focus on well-being and limit constraint trips. For this generation, five key levers will have a major impact on tomorrow's mobility.

TOP 5 levers will have a major impact on mobility developments in the next 10 years:



1. Working from home



2. Improving cycling infrastructures



3. Zero-emission mobility



4. Mobility hubs



5. Value of time

Beyond the means of transportation, the pandemic has accelerated the transition to a mobility with less constraints and more choice. This means reconsidering whether you need to go to the office every day, limiting the need to travel – and adapting transportation modes accordingly - and living more locally.



## THE COVID, AN IMMEDIATE BRAKE ON MOBILITY, BUT ALSO A TREND ACCELERATOR

#### **BRAKE ON MOBILITY**

With Covid, the emergence of multi-faceted risk triggered protective behaviors from all.

# NOMOBILITY VIRUS FEAR ANXIETY UNSAFE CONTAMINATION HYGIENIC MEASURES UNCERTAINTY LOSSOFINCOME



#### TREND ACCELERATOR

For young generation, 5 key levers will have a major impact on mobility developments within the next 10 years.



Working from home



Improvement of cycling infrastructure



Zero-emission mobility



Mobility hubs



Value of time

Reconsidering the daily presence at the office, favoring pleasant and healthy modes like bicycle or walk, over energy consuming ones, and also shopping within their neighborhood.





Living car-free has been a revelation to me: it has allowed me to be more active, be more eco-conscious, feel a greater purpose, and changed my values. I am an avid supporter of walkable cities, good urban design, and public transit development. Montreal

## This generation wants to change things, without giving up the notion of pleasure.

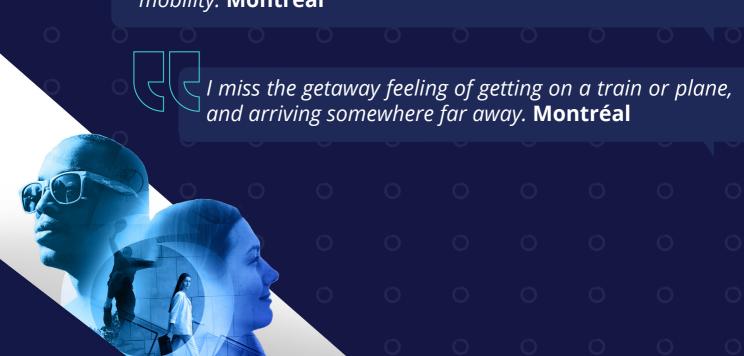
18-34 year olds are in favour of living within a 15-minute radius of their home. But they still want to discover the world, in a different way.

By questioning the necessity of each trip, COVID has strongly influenced daily mobility. These young urban dwellers want to free themselves from the morning and evening mobility constraints, find a village lifestyle in their neighbourhood and be able to organise their daily life within a 15-minute radius of their home. This is an opportunity to focus on healthy modes of transportation and take advantage of the opportunity

to work from home.

In their mobility, as in their lifestyle, the notions of pleasure and meaning remain key. It is with the same mindset that they consider long-distance travel and want to continue travelling to discover the world. Their sustainable mentality will lead them to travel less often, but for longer trips. And they imagine "hybrid travel" where work and tourism are usefully mixed and enjoyed.

I think that more people will work from home, which will change travel patterns and perhaps encourage more local micromobility. Montréal



By questioning the necessity of each trip, COVID has opened a window to a new way of life. These young urbans want to find a village lifestyle in their neighbourhood and be able to organise their daily life within a 15-minute radius of their home. This is an opportunity to focus on healthy modes of transportation and take advantage of the opportunity to work from home. For some, this means leaving large urban centres for smaller, more affordable locations.

I don't see myself living in a city forever, but if a city was designed with this quality of life, I would definitely consider staying in an urban situation a lot longer. **Seattle** 

With more and more people getting used to the "work from home" lifestyle, I think the use of car will go down significantly.

I think that more people will work from home, which will change travel patterns and perhaps encourage more local micro-mobility. **Montréal** 

Beyond mobility, COVID is raising questions about their way of life. These young generations are looking for a better quality of life where the notions of pleasure and meaning are key. This means making wise choices without giving up a work-life balance.

This state of mind is exactly the same when it comes to long distance travel. They want to continue discovering the world and do not envisage giving up long-distance travel, even if today this is mainly by air. When fast trains or carpooling are possible, they prefer them. This sustainable mentality will lead them to travel less often, but for longer trips. And to combine remote working and discovery during these trips to make the most of their time and minimise their impact on the planet.

I hope to be able to travel abroad as soon as the sanitary context is more favourable, even if today the option of the plane seems inevitable, unfortunately. **Paris** 

For me, lockdown marks the total end of mobility. What I miss the most is to be able to travel freely. **Nantes** 

In North America, this generation is impatient to see more high-speed trains to replace air travel for short-haul destinations. But with no viable alternative at the moment, they are still willing to fly.

Across Europe and America, the Gen Z and Y interviewed called for a new kind of mobility, a "hybrid mobility" that smartly combines rather than opposing - all modes and situations. They are ready to mix travel occasions (work or leisure) and transportation modes (collective and individual). Rather than giving up all the things that brighten their lives, they try to adapt their way of traveling to their values.

Once again, these digital natives, looking for a balance between work and private life, want to adapt the way they travel to the life they want, accelerating the transformation of mobility.

#### **A SPATIAL SHIFT**

Remote

working 's

A generation in favor of everyday life within a 15-minute radius to reduce carbon footprint but still aspiring to discover the world

Preference for healthier transportation modes



Acceleration of delivery options



15 minutes

They imagine a
"15-minute radius"
life organization,
coming from the
combination of



Save some precious time to relax, socialize, practice



A broader sustainability consciousness

I think that more people will work from home, which will change travel patterns and perhaps encourage more local micro-mobility (the need for shorter trips). Montreal

My life has felt more relaxed overall ...I enjoy being able to go out for a long walk or bike ride during the day, and value that flexibility in my schedule now. Seattle

The more technology evolves, the less the population will move, because there will be everything that man considers a need nearby, why bother moving? **Paris** 

But still aspiring to discover the distant world... in reasoned mode

#### **SUSTAINABLE MOBILITY FRIENDLY TRADE OFF**



Travel far away, less often but for longer time



Bullet train when available, plane where no other choice



I miss the getaway feeling of getting on a train or plane and arriving somewhere far. **Montreal** 

#### **HYBRID MOBILITY FOR LONG HAUL**



COMBINING TRAVEL OCCASIONS:

Travel far away, stay longer, mixing remote work and leisure



COMBINING TRANSPORT MEANS

for greener and effective travel (collective/green transport to reach airport)

## Sustainable mobility is like the Everest, joining forces is key to reaching it.

Young people expect a lot from public authorities, cities and companies in order to act together and speed up change.

This generation is ready to make many changes in the way it uses mobility. But when it comes to infrastructure, innovation, urban planning and safety, they feel powerless to act. They expect public and private stakeholders to mobilise and listen to them. Expectations are different in Europe and North America with greater mistrust in Europe, and particularly France, regarding the use of personal data and the choice of operators. They are especially worried

about possible collaboration with GAFAs\*.

On both sides of the Atlantic, young people expect employers to get involved and promote a different kind of mobility for their teams including subsidies, working from home and shared infrastructures.

This generation wants to be part of the change and will use all its influence to make things happen as citizens, employees, customers and mobility users.



Cities will have to offer alternatives to driving, so that we can live in a less polluted world. **Madrid** 



Even as they adopt responsible behaviours in terms of mobility, these young urban dwellers feel powerless to create deep change without the help of public and private actors. When it comes to infrastructures, innovation, urban planning and safety, young people expect them to mobilise, listen and give them the means to change things.

In the US, expectations are higher for the private sector, especially innovative companies and visionary personalities, who invest heavily and are therefore most likely to influence future mobility. Conversely, public authorities, especially at the federal level, have, in their view, little influence. However, local elected officials are a useful lever. Young people are excited about bike lanes etc, and they voted for the current Montreal mayor because she promised she would extend the metro and bus systems.

Montréal

Cities will have to offer alternatives to driving so that we can live in a less polluted world. **Madrid** 

In Europe, and in particular in France, there are high expectations of public authorities, who must lead the way and guarantee general interest, ensuring that decisions are not taken to benefit private companies, in particular GAFAs. But this generation also believes that private players must commit. They acknowledge the know-how of leading companies in industrial and technological innovation, and they want them to step up.

It is the public authorities because they have a role in the creation of infrastructures, bike paths... And then it's the employers by encouraging remote working, rewarding those who come to work in groups and developing, as in Northern Europe, the equipment available when you come by bike like showers and lockers. Paris

On both sides of the Atlantic, young people expect employers to get involved and promote a different kind of mobility for their teams including subsidies, working from hom and shared infrastructures.

If they expect a lot from different stakeholders, this generation also wants to be part of the change. They will use all their influence to make things happen as citizens, employees, customers and mobility users.

I believe the younger generation understands the importance of public transit and biking, and walking. I think that we will see a trend toward sustainability because many people my age and younger are passionate about seeing and making a change, and about rewarding companies who are leaders in making changes.

Montréal

#### **ACTING TOGETHER**

Sustainable mobility, a challenge too huge to take on alone. 18-34 years old can contribute, provided that public authorities and private sector take the initiative and listen.

#### **EXPECTATIONS TOWARDS PUBLIC AUTHORITIES**

Mainly in Europe



It's the public authorities because they have a role in the creation of infrastructures as well as in the creation of bicycle paths, for the implementation of greener things. **Paris** 

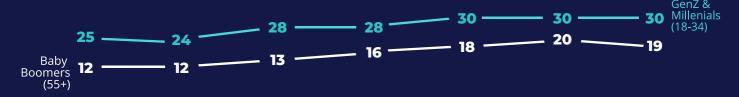


Cities will have to offer alternatives to driving so that we can live in a less polluted world. Madrid

#### EXPECTATIONS TOWARDS PRIVATE PLAYERS TO DRIVE THE CHANGE AND GET INVOLVED IN THEIR AREA OF EXPERTISE

In North America and Europe

«Brand should be an example and lead and drive the change»



AUGUST

Kantar Covid19 Barometer - March to August 2020

☐ I believe the younger generation understands the importance of public transit and biking, and walking. I think that we will see a trend toward sustainability because many people my age and younger are passionate about seeing and making a change, and about rewarding companies who are leaders in making changes. Montreal



And then it's the employers by encouraging remote working, rewarding those who come to work in groups; where is there space, when you come by bike, to shower or store your stuff like in northern countries. Paris



### MOVIN'ON MOBILITY SURVEY powered by KANTAR

#### Study: methodology and panel

This study relied on two components:

- A quantitative survey conducted in 2019 with 5,000 young urban dwellers in Europe and North America. This survey provided precise quantitative data on the mobility habits of young urban dwellers between the ages of 18 and 34.
- A qualitative survey conducted during autumn 2020, after the first lockdown, with around 70 young urban students or workers, all concerned about the environment. They were brought together in small discussion groups in six cities, three in North America (New York, Seattle and Montreal) and three in Europe (Paris, Nantes and Madrid).

The two regions selected for this survey, Europe and North America, provide insights from two geographies where the role of cars differs greatly, which has an impact on how their populations view mobility.

#### **Trend sensor**

The aim of the study launched by Movin'On was to explore how 18-34 year old see their lifestyles and mobility in a post-COVID world. The focus groups allowed us to capture the signals emitted while sharing their desires, fears and needs.

The results of the study constitute a trend book enabling us to direct our work and resources where we perceive new needs and structural changes.

Movin'On provides its ecosystem (companies, cities, countries and civil society) with tools, resources and technological monitoring in order to innovate together. This survey is one of these tools that Movin'On is delighted to share with all members, as well as more widely.

#### **MOVIN'ON**

Movin'On is the world's leading co-innovation ecosystem committed to sustainable mobility. It brings together more than 250 public, private, collective and individual players to provide concrete solutions and innovations. This is done largely through its think-and-do tank Movin'On Lab and Communities of Interest. Every year, the Movin'On community organises physical and digital events to drive projects forward in tangible ways, together with major companies, start-ups, international organisations, public authorities and academia.

Learn more at www.movinonconnect.com/en



