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The Mobility Leader

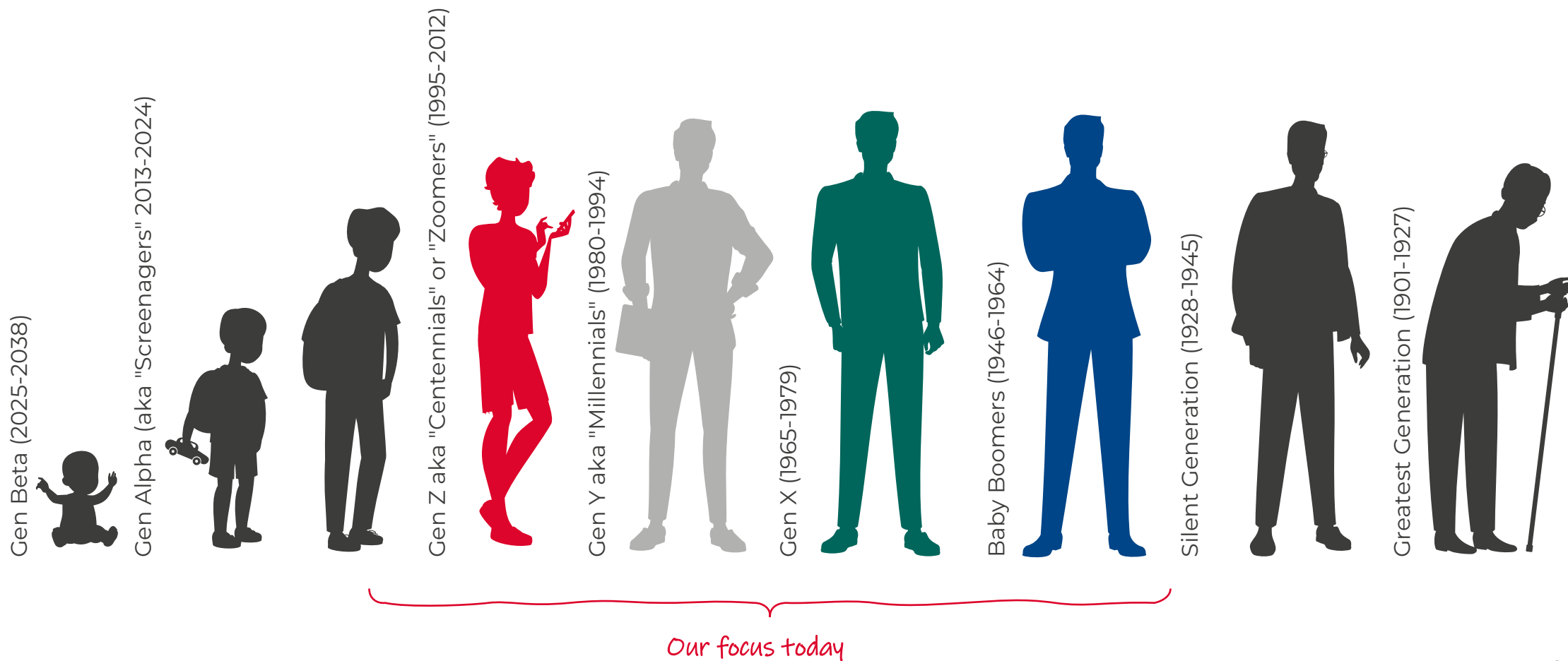
Driving next generations into future mobility Leveraging technologies and modalities

Mario Tartaglia

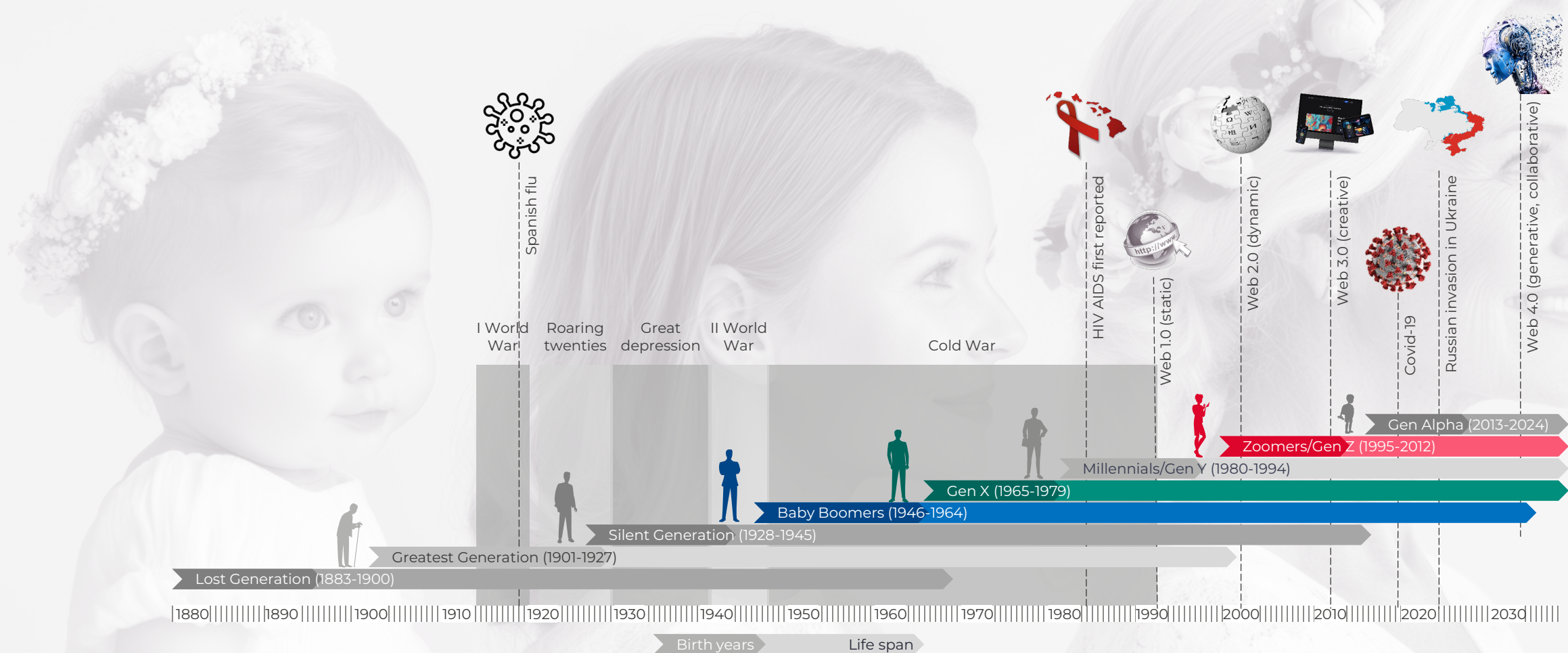
Leader of FS Research Centre

4th March 2025

Generations by birth years



Generation and history



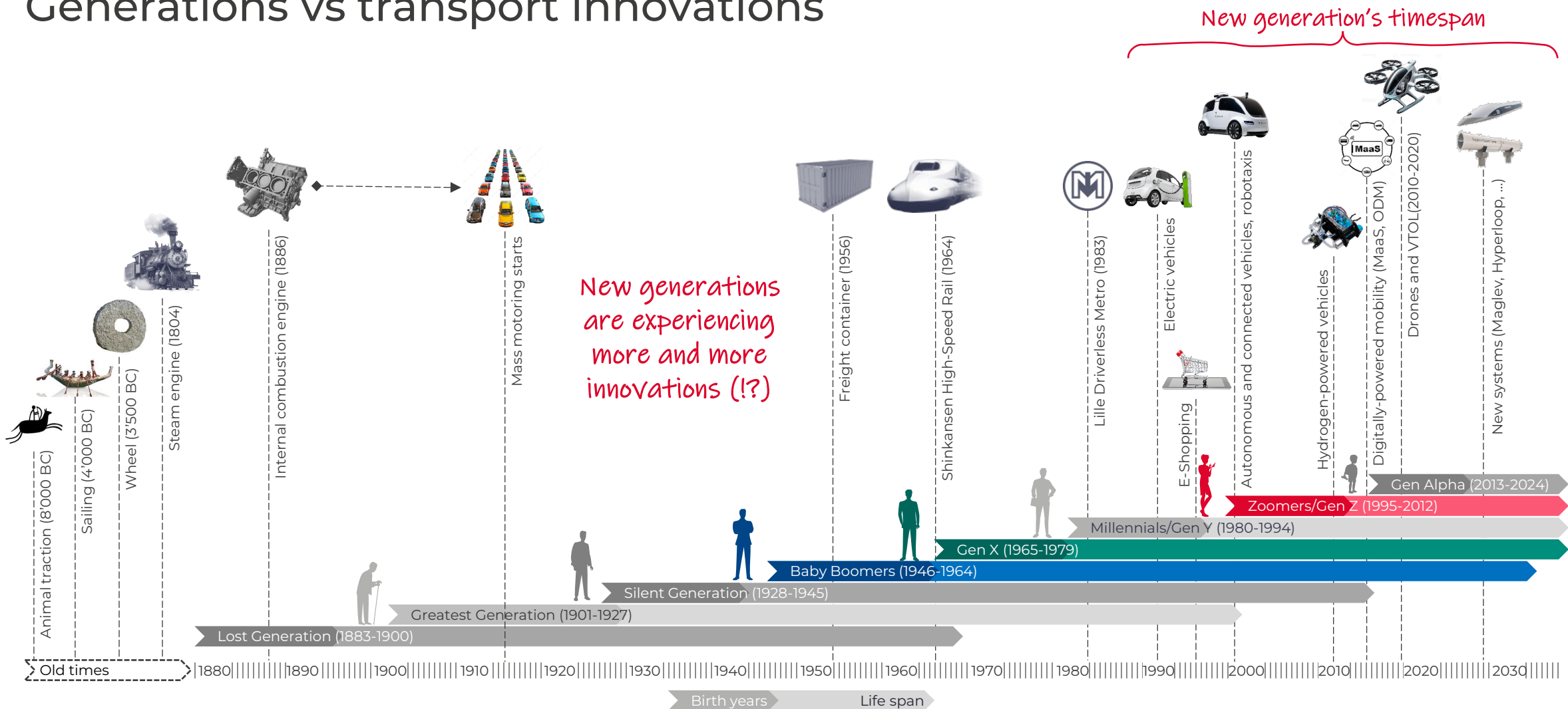


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New generations and transportation

Generations vs transport innovations



Source: Author's processing based on [1] Van Wee B, et al. (2021) Innovations in Transport; [2] Standage, T (2021) A Brief History of Motion: From the Wheel, to the Car, to What; [3] Cascetta, E. et al (2021) The six transport revolutions and their evolutions. A brief history from the beginnings to the present day [4] Cascetta, E. et al (2021) The seventh transport revolution. Ongoing innovations and possible future scenarios. Picture sources: Adobe Stock, the Web.



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New generation's attitudes

From new generation's attitudes to mobility behaviour

GenZ's general attitude

Mobility behaviour

Simplicity. Being digital natives, they get used to quick, fast and simple means for acting. [1], [2], [3], [4].



Need for a **unique (digital) access point** to mobility services.

Stability. Living unstable times, they try to avoid risks and prefer routines.



Inclination to **systematic** mobility behaviours.

Sociality. They aim to spend quality time in presence with friends and people.



Significant share of **mobility for leisure** reasons.

Sustainability. They got a strong commitment to the environment and sustainability (as long as it doesn't entail considerable restrictions to their life balance). [1], [2], [4].



Preference for the use of **sustainable transport modes** sometimes even when it involves decreased performance.

Flexibility. As financial and space-time resources are generally less than in the past, they pay attention to resources optimization, that need high flexibility. [1], [2], [3], [4].



Attitude for the use of **integrated mobility**, as long as it is not complicated. Lacking it, **the car** could be an alternative for getting simplicity.

Gen Z's mobility is more multimodal

- ✓ Younger generations seem to be more inclined to **mix different transport modes**,
- ✓ reducing their private-car reliance in favour of shared-mobility modes, micromobility and public transport.

Gen Z is committed to sustainability

- ✓ Younger generations seem to be very interested in adopting a mobility behaviour that is as **sustainable** as possible, particularly with regard to climate effects.
- ✓ Their favourite choices about means of transport include:
 - using fully **electric** individual vehicles
 - preferring **smaller vehicles**, such as compact cars and even smaller mini and micro-mobility vehicles
 - being sensitive to the **protection of nature** and concerned about the **environmental impacts** and sustainability of their mobility choices
- ✓ European Gen Z **acknowledges sustainability but prioritizes cost, quality, and convenience.**

GenZ: from ownership to usership

- Younger generations seem to be very interested in non-conventional methods for accessing mobility, such as:
 - sharing their private vehicles with others,
 - renting vehicles,
 - using car subscription
 - getting bundles including shared-mobility modes and ride hailing

Gen Z likes new purchasing approaches

- In order to buy a personal vehicle, they take especially into account its **design** and **innovative technologies**, such as **safety** systems, driver **assistance** systems, **multimedia**, and **digital** features.
- They are very **concerned about price**, that is usually the top buying factor.
- Their vehicle purchasing approach is usually **online-based** both for searching and configuring and buying the mobility solution. Hence, their choices could be influenced by **digital marketing**. They also look online for a financing solution.

Gen Z inventing new mobility patterns

- ✓ **Bleisure**: combining business travel with leisure, such as adding a day off to a business trip in order to do some exploring. Generation Z values experiences more than possessions, so consider flexible working hours, as well as the opportunity to work remotely.
- ✓ **Autonomy**: The younger generation prefers to be in charge of business travel and associated arrangements, such as booking hotels and transport, that in the past were managed entirely by the employer. The only thing that Generation Z expects of the employer is to make the budget available and to keep the declarations as simple as possible.



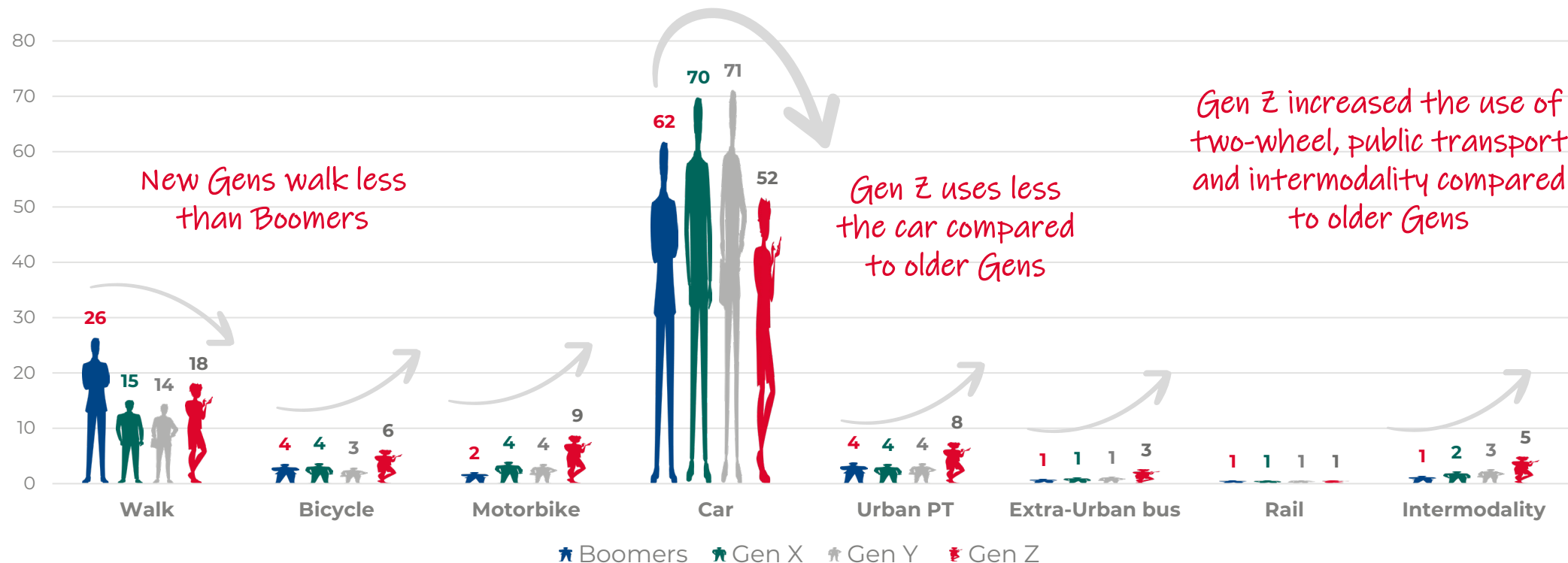
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New generation's mobility behaviour

New generation's mode choice

Transport mode share (%) - [1] Scope: Italy. Year: 2023

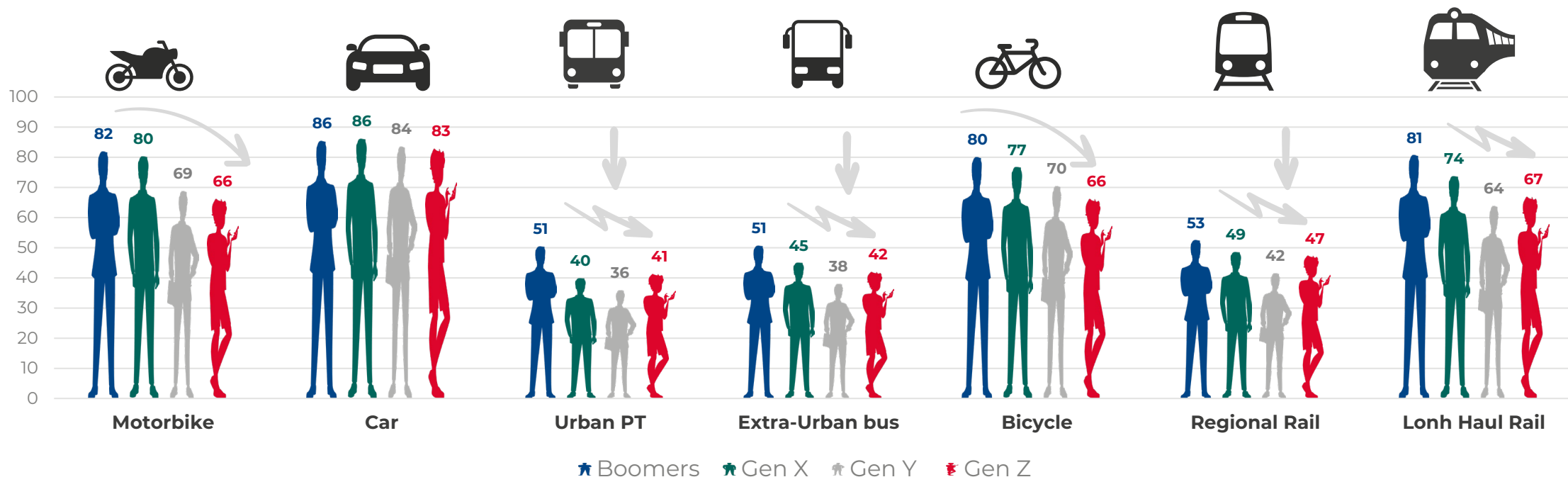


New generation's favourite transport modes

Transport mode satisfaction (%) - [1] Scope: Italy. Year: 2023

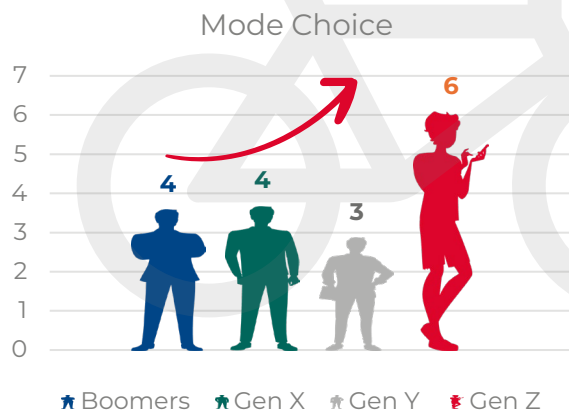
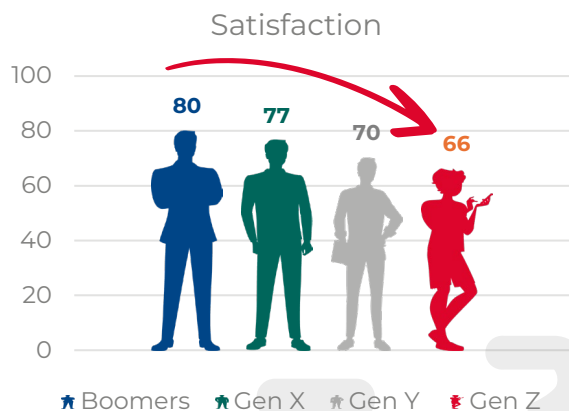


Although they are strongly interested in integrated and sustainable mobility, newer generation aren't so satisfied by two-wheeled and Public Transport (!)

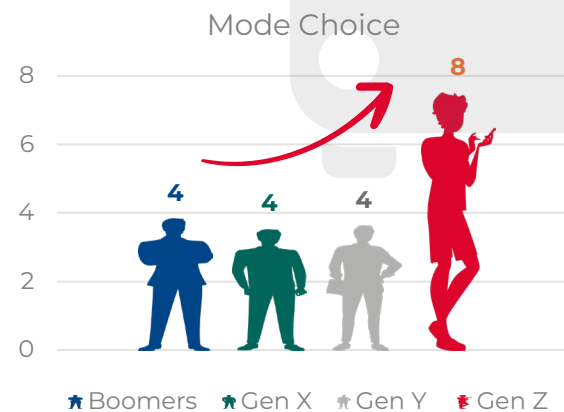
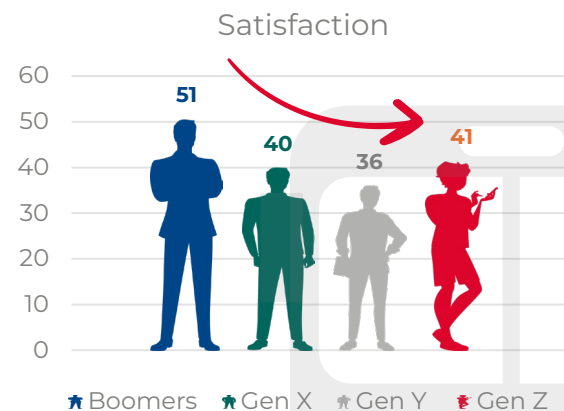


Crossing data: an illusory contradiction?

Transport mode share (%) and satisfaction (%) - [1] Scope: Italy. Year: 2023

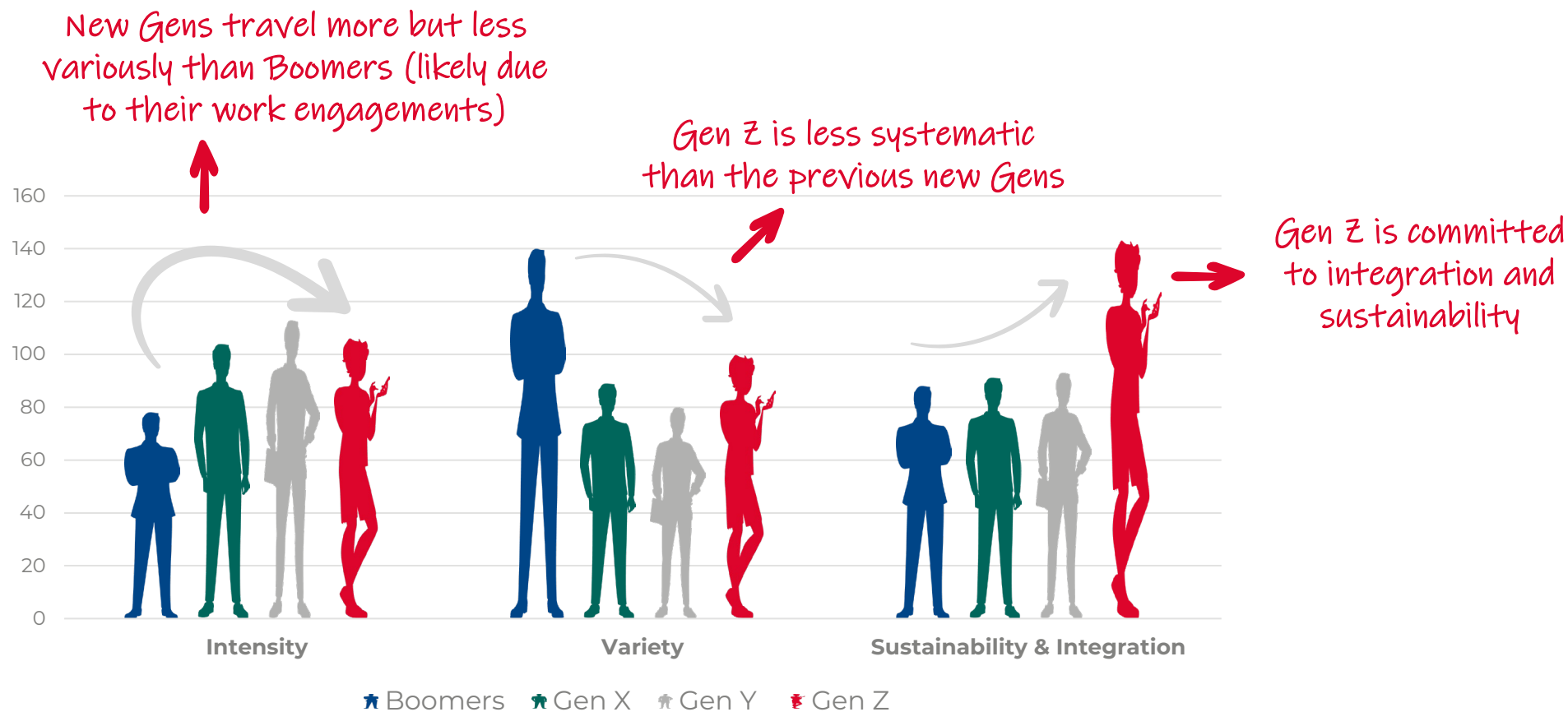


Compared to the former Gens, Gen Z uses even more bicycle and public transport, but it is less satisfied with them



New generation's mobility patterns

Mobility pattern index - [1] Scope: Italy. Year: 2023



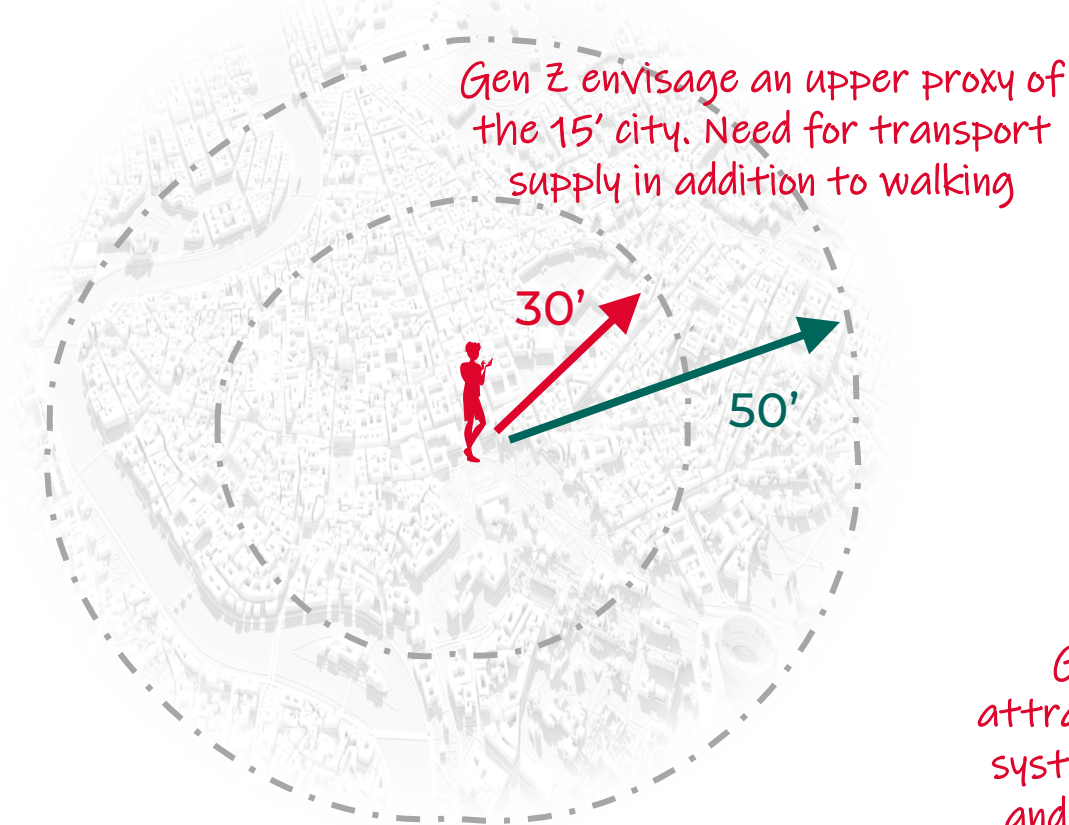


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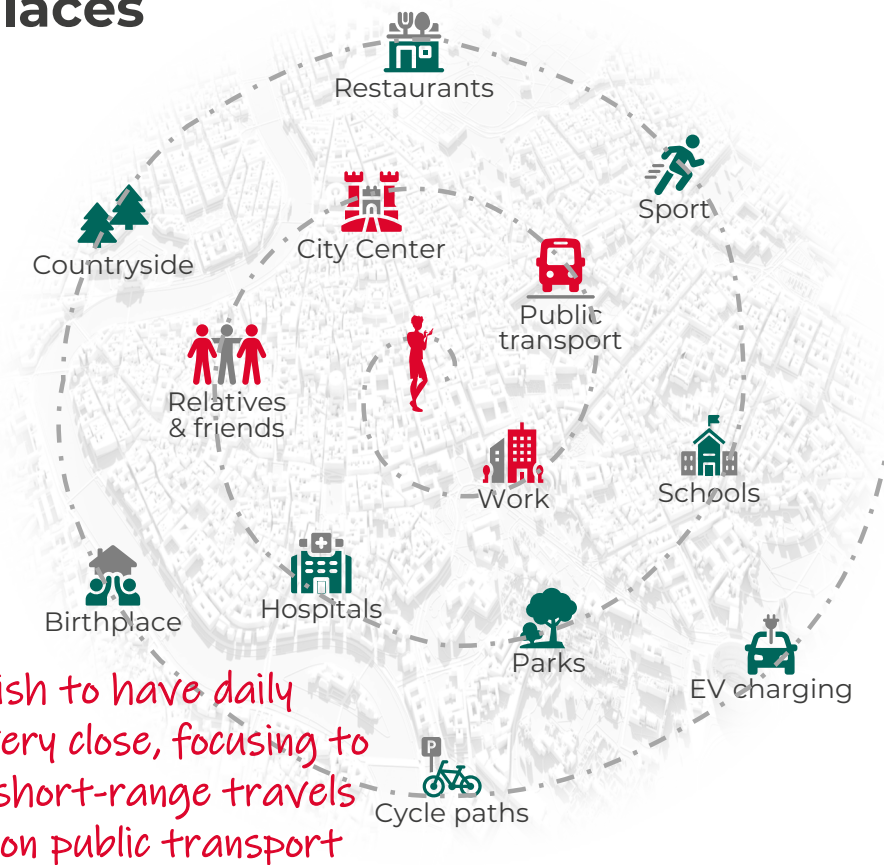
New Gens and the (smart) city

GenZ's urban mobility radius and favourite places by wished proximity

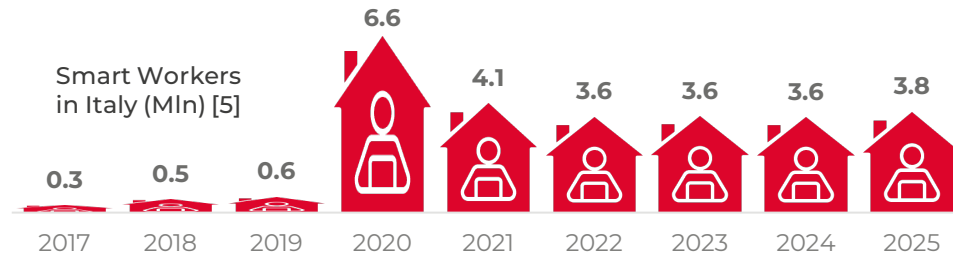
Time radius



Places



New Gens working patterns



✓ In Italy, after the 12.3% peak recorded in 2020 due to Covid-19 pandemic, the percentage of workers using **remote-work** opportunities fell to **4.4%** in 2023 [1].

- ✓ Some international surveys show that all the **New Generations (X, Y, Z)** seems to need a **balance between remote and in-person interactions** [2], with the preference for hybrid work proportionally stronger for younger people [3].
- ✓ In Italy, despite being digital native, even the younger GenZ workers aren't willing to work totally by remote [4]. They strongly request **flexibility regarding to both job location and work schedule**.



A new space/time-flexible mobility supply is required



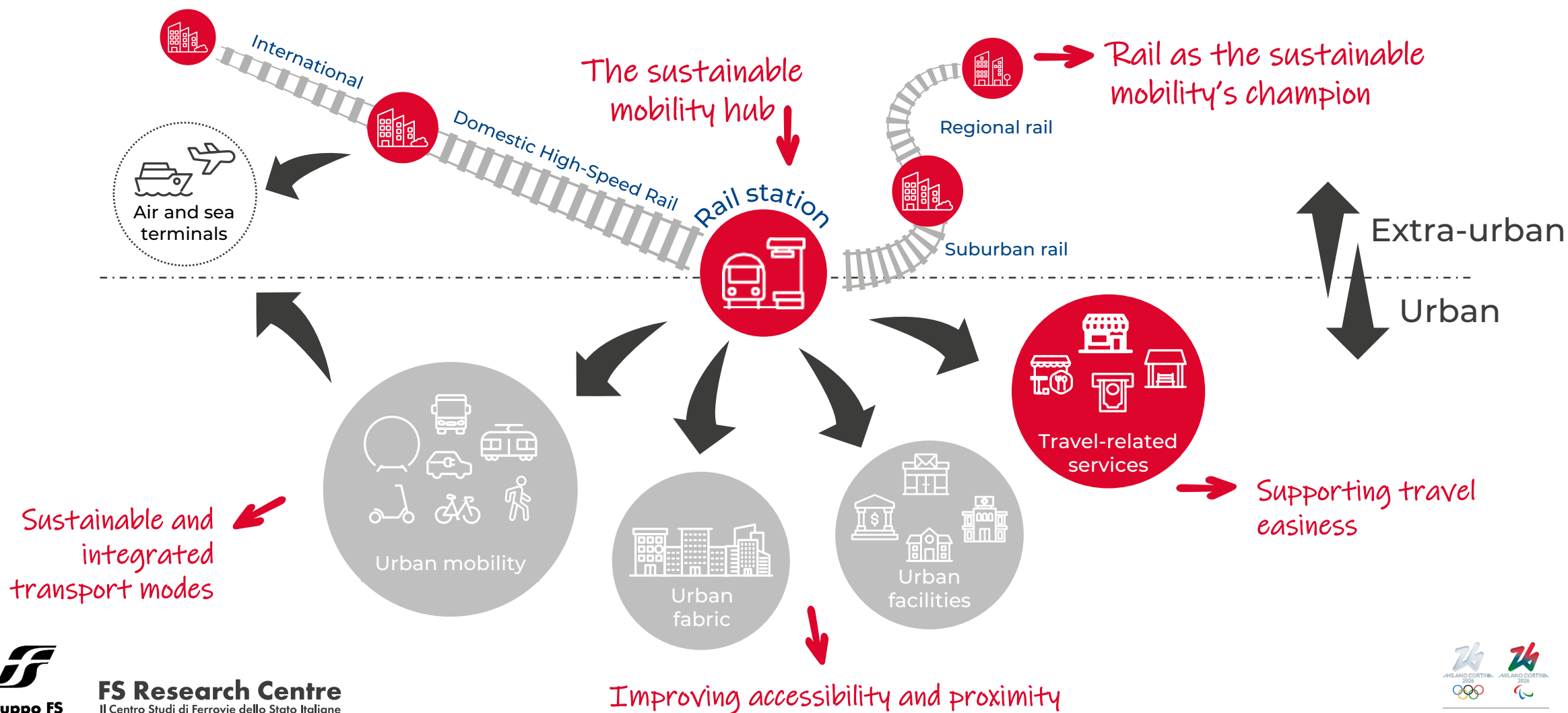
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Meeting the New Gen's needs

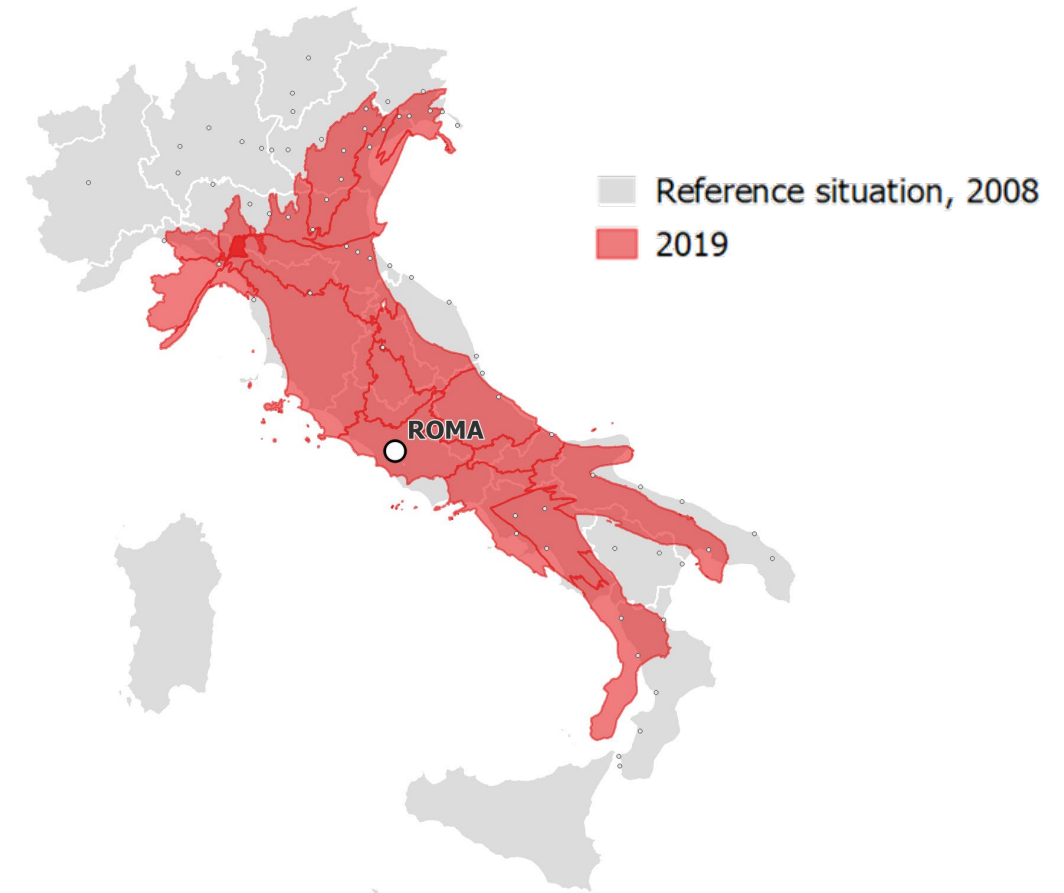
Meeting the New Gen's needs

Providing integrated sustainable mobility



A sustainable and efficient mobility supply could be a game changer

- ✓ The cartogram on the right shows Italy's **virtual perceived deformation** based on travel time changes occurred in 2019 between Roma and the rest of the country.
- ✓ The changes were due to the entry into service of the **High-Speed Rail** and the new rail service timetables.



↙ This kind of interventions could expand individual activity space-time prism.



How to support flexibility needs

Get seamless travelling by means of digitally integrated mobility supply



Mobility as a Service (MaaS). It integrates various forms of transport and transport-related services into a single, comprehensive, and on-demand mobility service, managed by means of digital solutions and including public transport, walking, cycling, ride/car/bike-sharing, taxi, car rental or lease, and others [1].



Mobility as a Feature (MaaF). It is an extension of the MaaS concept, aimed at integrate mobility with unrelated services such as food delivery, financial services, e-commerce and shopping and so on [2; 3].



Mobility on Demand (MoD). It provides on-demand mobility services on request, mainly through digital platforms, with flexible routes and schedules. Examples are: taxi, ride-hailing, carpooling, demand-responsive collective transport, robotaxi [4].



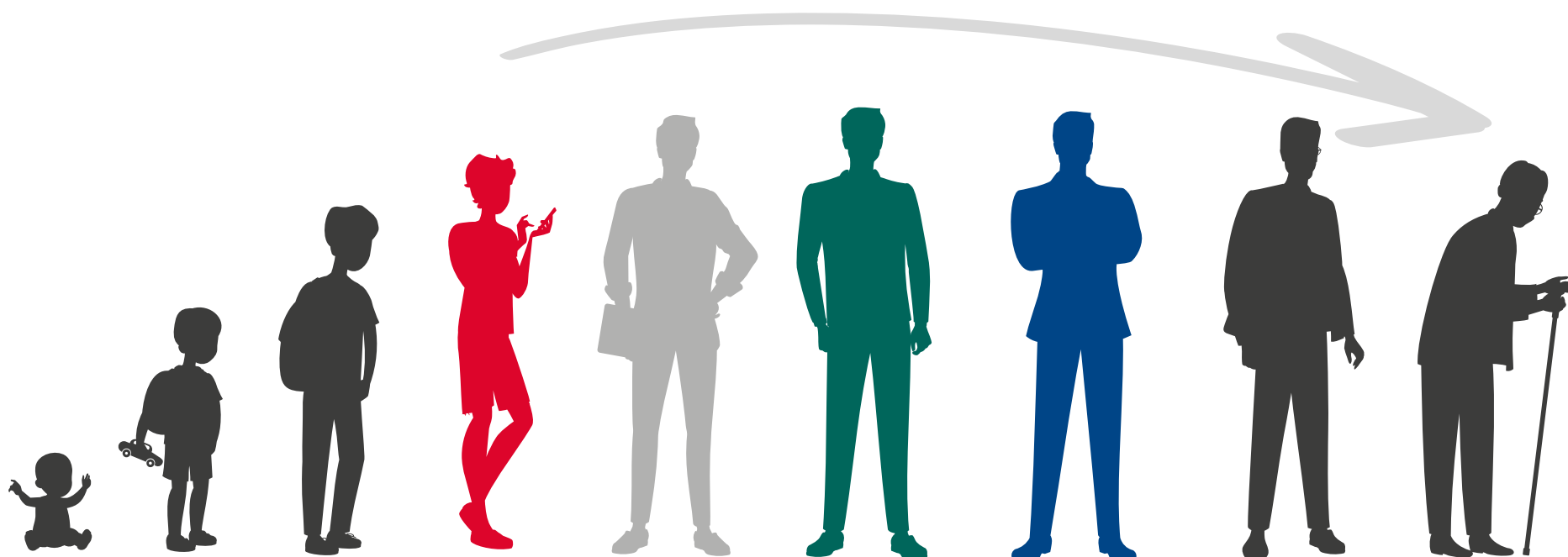
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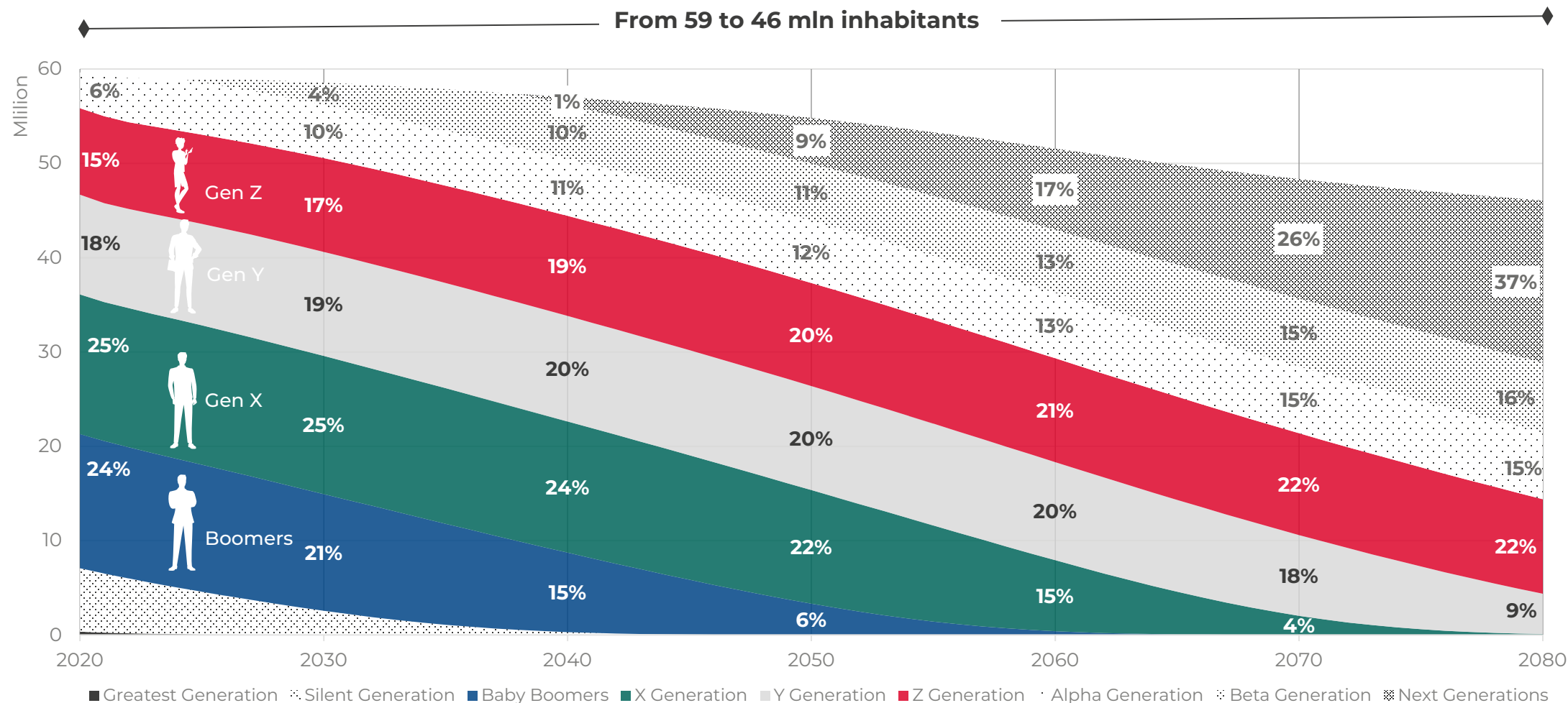
Gen Z and the future

Will Gen Z hold its behaviour forever?

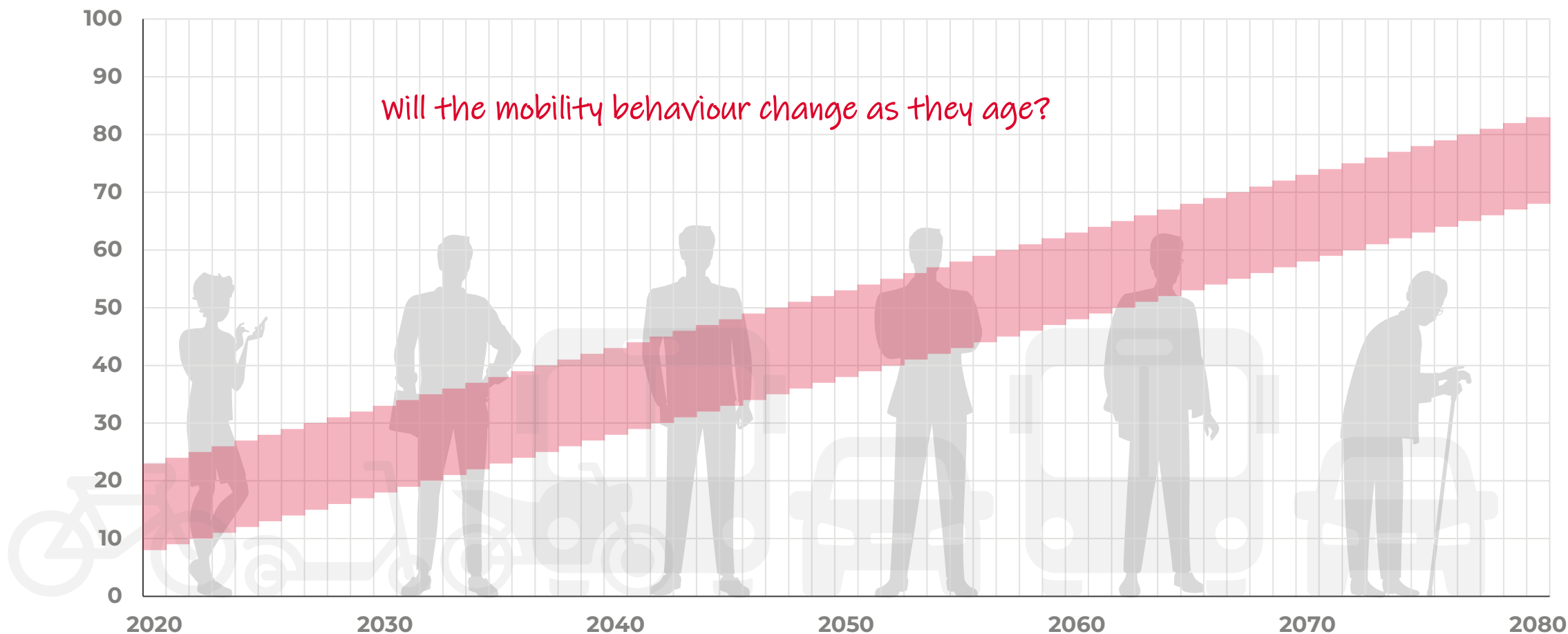
- ✓ How long Gen Z will keep their new attitude in mobility?
- ✓ Is Gen Z mobility behaviour really new, or is it just due to being young?
- ✓ If ageing is leading to an increasingly elderly society, what will Gen Z's weight be?



The weight of Generations in the next future



GenZ age range evolution





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Thanks for your attention

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<https://www.fsitaliane.it/content/fsitaliane/en/fs-research-centre.html>

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