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

- Young urban dwellers shed light on tomorrow's mobility trends
- In small discussion groups, these environmentally committed young people share their vision and aspirations
- In Europe and North America, they have adopted new habits with COVID and want to change their lifestyles

**Paris – Nantes – Madrid – Montréal – New York – Seattle, March 9<sup>th</sup>, 2021** – 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**.

1

**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**

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## 2

**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 kind of mobility**. 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.

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*“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**

## 3

**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.

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

*“I miss the getaway feeling of getting on a train or plane, and arriving somewhere far away”.* **Montréal**

## 4

**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.

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

## 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.

Detailed report of the study is available [here](#).

## 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.

## About 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](http://www.movinonconnect.com/en)

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