MOBILITY FUTURES

How mobility will be shaped by the world's great cities

KANTAR

WHY WE NEED SLICKER CITIES

The great cities of the world are energising and challenging places to live. One of those challenges is how people travel to, across and within the urban landscape.

As populations grow and the pace of life intensifies, a city's mobility needs increase. Its citizens demand more convenient and efficient ways to travel.

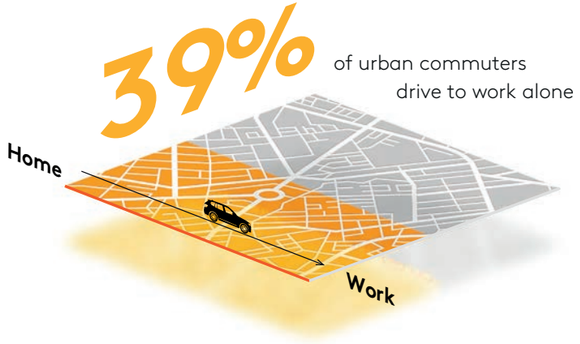
Our analysis of behavioural change over the past two years and people's intentions for the coming five, show an increasing appetite for cross-city travel alongside a change in requirements – more leisure-based trips as commuter levels drop due to remote working.

Although people appreciate the environmental need to limit the use of cars for personal transport, they still feel there are reasons that justify using them such as convenience, safety and accessibility. Particularly in the emerging cities, there is a strong emotional connection with the car as a symbol of status and success.

So, it falls to the cities themselves to design, implement and promote genuine alternatives. They need to create the environment and the positive conditions that motivate the population to change its behaviour. This will enable start-ups to offer new services and products. It also demonstrates how industry players can stay relevant by developing new products, offers and services.

The future of mobility will be shaped in the great cities of the world. But only if it is shaped **by** the great cities. Their citizens will not act alone.

To achieve meaningful behavioural change, strong, sustainable initiatives must be established. They must also be integrated across the entire mobility ecosystem, with public/private collaboration to find the best solutions and alternatives to the car.



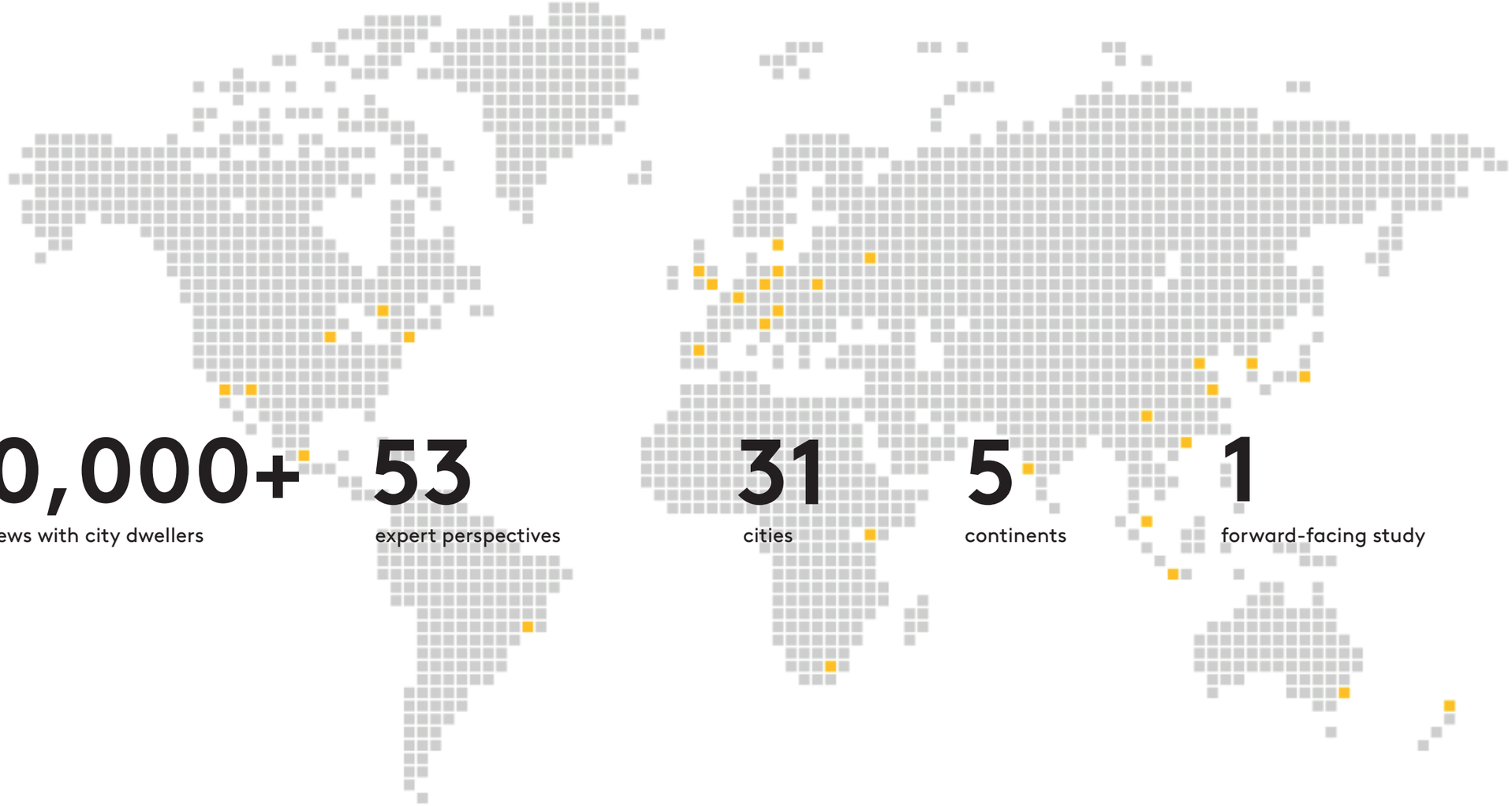
TODAY'S SITUATION

TOMORROW'S OPPORTUNITIES

To better understand today's challenges and uncover tomorrow's opportunities for mobility players and municipalities, we've talked with 20,000 people across 31 cities.

This allowed us to create comparative rankings taking into account a wide range of factors including affordability, congestion levels and the availability of public transport. This data was then complemented with interview responses from city dwellers, exploring their current travel experiences, desired modes of transport and the emotions they attach to each one.

We presented the findings to 53 of the world's leading mobility experts, asking them to interpret the results and predict their impact by 2030. Some of their comments are featured in the pages that follow.



20,000+
interviews with city dwellers

53
expert perspectives

31
cities

5
continents

1
forward-facing study

Amsterdam	Chengdu	Jakarta	Madrid	Montreal	Nairobi	Sao Paulo	Sydney
Auckland	Chicago	Johannesburg	Manchester	Moscow	New York	Seoul	Tokyo
Beijing	Copenhagen	London	Mexico City	Mumbai	Paris	Shanghai	Warsaw
Berlin	Guangzhou	Los Angeles	Milan	Munich	Phoenix	Singapore	

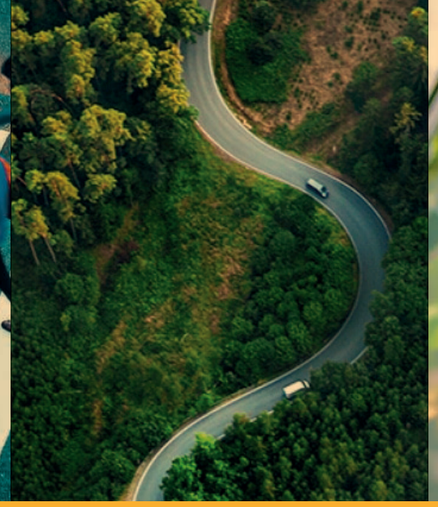
WHY CHANGE?

The underlying context of today's mobility landscape is a complex, interwoven backdrop.

Aside from the personal circumstances and motivations of travellers, other factors impact the mobility options available.

Economic
Employment investment is centred in the places with the most capable, most available workforces.

This drives urbanisation and in turn, necessitates delay-free commuting.



Ecological
Improving mobility infrastructure helps cities to address environmental issues.

Technological
Innovations will replace significant parts of established, traditional systems.

Political
Authorities with regulatory power have the ability to influence mobility behaviour.

Socio-cultural
As behaviour evolves, cities will adopt new mobility business models.

KEY THEMES

1. PEOPLE ARE READY FOR CHANGE
2. TRAVEL CHOICES ARE EMOTIONAL
3. ALL CITIES ARE DIFFERENT
4. SHARING IS TRANSFORMATIVE

1

PEOPLE ARE READY FOR CHANGE

When we asked people how they currently travel in and around the city versus how they would ideally want to travel, a clear narrative emerged.

Solo car commuters or those choosing public transport were the most likely to seek alternatives.

Over 37% of those driving would gladly leave their car at home, while 43% of public transport users are keen to find an alternative. This is in contrast to the number of people who want to walk, ride-share, car pool and cycle. More people want to use those methods than they currently do.

There's the potential for almost a 25% growth in alternative mobility modes. This includes a wish for people to be a passenger in the car instead of driver to make the most of the travel time and to reduce the frustration felt when wasting time stuck in traffic jams.

Would like to change mode of transport (global average)

Change 25%

No change 75%

1

PEOPLE ARE READY FOR CHANGE

"Driven by digital technologies and cost-effectiveness, on-demand shared micro-bus systems and ride-hailing services will improve city traffic and disrupt public transport."

Mobility Futures Expert Panel

INSIGHT TO OPPORTUNITY

Mobility as a Service (MaaS)

By enabling convenient, individually optimised inter-modal travelling in the city, Mobility as a Service (MaaS) will fulfil the desires of the 25% car and public transport defectors. It's not a huge leap of the imagination to suggest that this could, in time, become the preferred way of moving within the city.

Cities implementing MaaS as an open platform with adaptive rates for each user will win big. Some cities, such as Berlin, are starting to transform multi-modal mobility by using innovative, integrated technology that allows access to every possible route and mode of public transport, offering people a wider selection of credible travel choices and promoting the most efficient.

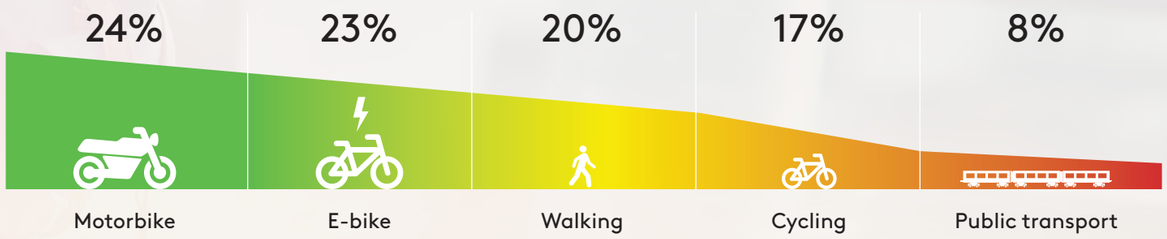
And for the drivers who would rather be passengers, there's also an opportunity to encourage and promote alternative car-based solutions such as autonomous vehicles and a variety of sharing options.

2
TRAVEL CHOICES ARE EMOTIONAL

We asked urban commuters how they felt about different forms of mobility, indicating the level of happiness they felt when using specific modes.

It was the two-wheeled options that made people happiest with motorbikes and e-bikes delighting the most, followed by walking and bicycles. Public transport languished far behind.

Feeling delighted with current mode of transport



2
TRAVEL CHOICES ARE EMOTIONAL

"Micro-mobility will benefit from car-free cities. With safer routes, e-scooters and cycling will gain share."

Mobility Futures Expert Panel

INSIGHT TO OPPORTUNITY

Cities are well-placed to delight their citizens by providing more cycle lanes and rewarding riders of low-emission or electric motorcycles and scooters. Not only will it benefit the environment, it will have an uplifting effect on the collective mood of its citizens. These vehicles take up much less space than cars, so it also helps to address the issues of densification and scarcity of space.

Promising a happier life is a compelling proposition for municipalities keen to improve quality of life for their inhabitants, not to mention garner a few extra votes come election time. Gaining a reputation for being a great place to live will attract the brightest minds into the local workforce, while improving the mental and physical health of those already living there.

People centricity

3

ALL CITIES ARE DIFFERENT

All cities are different in terms of both their mobility issues and the solutions they have developed to address them. Understanding these differences helps.

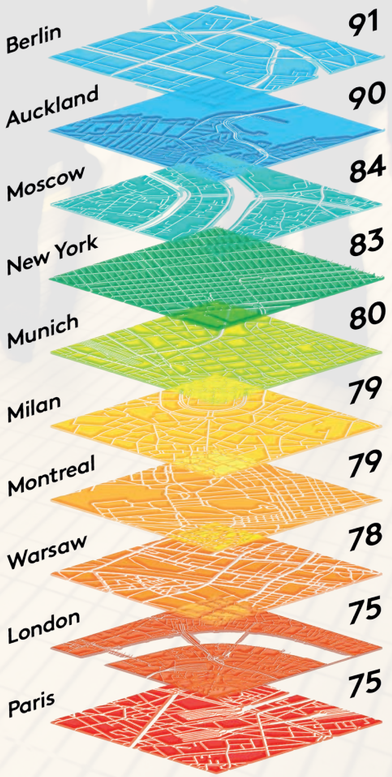
Our comparative indices ranked cities across a range of factors: population, environment, economy, public transport and overall mobility.

They measured the ease of movement around and through the urban environment.

Our City Mobility index highlights the cities that perform well and those with work to do to ensure the free flow of its people.

City Mobility index*

Top ten cities



*The index considers income equality, transport costs vs. income, public transport network vs. population size, availability of public transport or motorisation rate.

3
ALL CITIES ARE DIFFERENT

"People-centric cities will be the future. The question is how fast. In order to remove single cars from city centres, we need long-term investment into public transport capacity, a vast shared mobility offering, and cities have to solve their logistical issues."

Mobility Futures Expert Panel

INSIGHT TO OPPORTUNITY

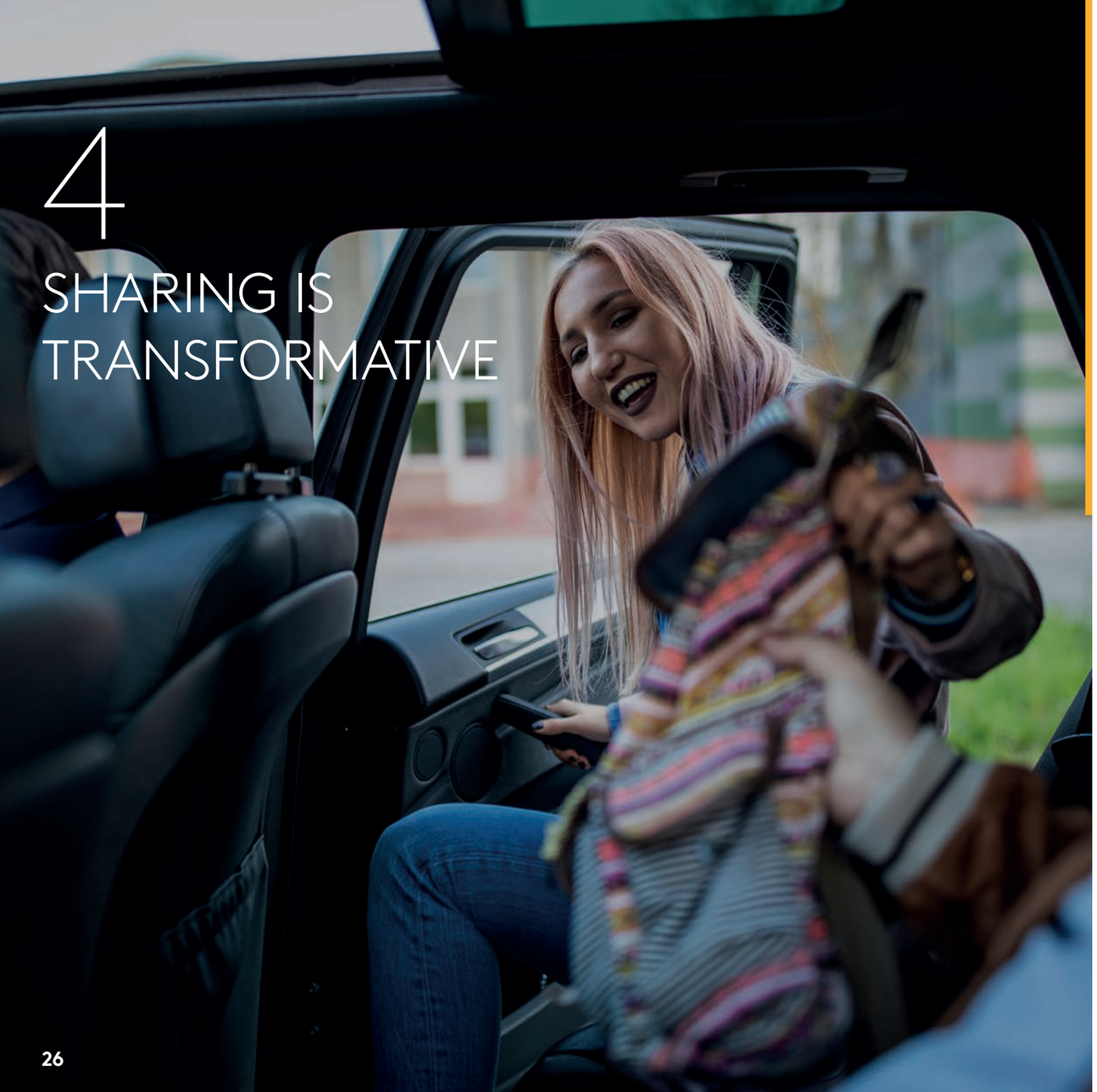
Many governments and municipalities with weaker scores in our indices simply do not have the financial resources or local expertise necessary to turn their mobility fortunes around.

For them, reaching out to cities closer to the top of the league to learn and understand how to implement the most effective mobility measures will save them time and money. It will also help them to gain insight they would otherwise never have known existed, were it not for our city rankings. Thinking smarter, not spending bigger could be the simplest way to accelerate mobility transformation.

Thinking smarter

4

SHARING IS TRANSFORMATIVE



Our experts believe that shared services are a substantial opportunity for the future of urban mobility and there is an appetite for sharing in most cities surveyed.

Car sharing (the short-term rental through providers like car2go and Zipcar), car pooling (sharing the journey so there's more than one person in the car) and bike sharing reveal great potential worldwide.

Car sharing offers a sustainable role for cars, and the benefits associated with them, as part of the urban mobility landscape. Across the countries studied, this is currently used on average by just under 1% of the population. However, the number of people who expressed a preference for car sharing instead of their current mode of transport indicates that this could more than double in size making it a hip and significant niche.

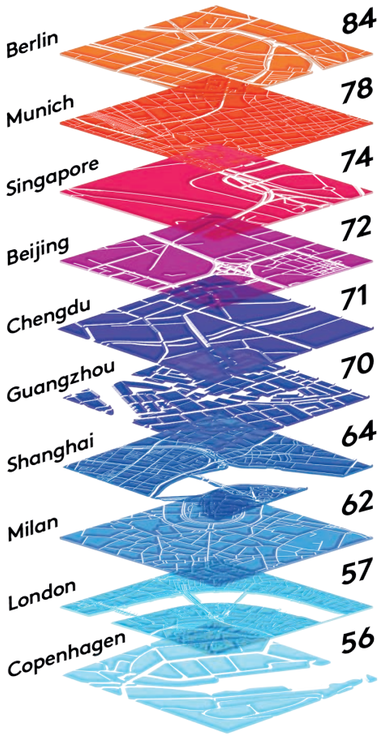
The car sharing opportunity is significantly bigger in some cities than others, the top five being Beijing, Milan, Moscow, Shanghai and Madrid.

The Shared Mobility index

Our index measures the city's readiness for the sharing economy. It takes into account the sharing cost related to income, number of sharing systems, number of cars and number of bikes per capita.

We see from these results that two German cities top our ranking. This is due to their successful car sharing scheme which is run at a relatively low cost. The Chinese cities which follow are highly-ranked due to their very large bike sharing offer.

Top ten cities



4

SHARING IS TRANSFORMATIVE

"The automotive industry will have to transform their businesses by providing mobility services instead of "just" hardware. They also must partner with innovative players."

Mobility Futures Expert Panel

INSIGHT TO OPPORTUNITY

Car manufacturers (OEMs) can gain a competitive advantage by becoming mobility service providers. And cities can accelerate their growth further by offering tempting incentives to bring car sharing onto their streets. It's a paradigm shift for the auto sector, but a necessary one if they are to thrive in the new urban mobility reality.

By concentrating their efforts in the cities most receptive to car sharing schemes, they are more likely to succeed.

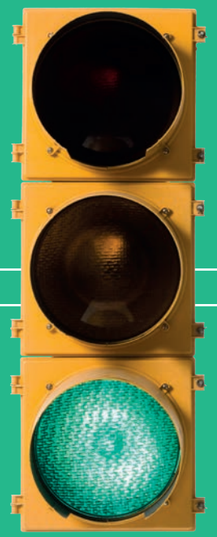
Focusing on cities with the highest population density has been the traditional business model thus far. Now with robust data pointing them towards easy wins, and city legislators keen to bring them on board, a large amount of speculation and risk has been removed from the equation.

Incentivise sharing

4 BIG OPPORTUNITIES

1 **PEOPLE ARE READY FOR CHANGE**
There's a large proportion of every city's population hungry for convenient, individually-optimised travelling.

2 **TRAVEL CHOICES ARE EMOTIONAL**
People are more likely to use modes of transport that bring a little bit of delight into their daily commute and become a lifestyle choice rather than just a way to get around.



3 **ALL CITIES ARE DIFFERENT**
By reaching out to the cities with best practice mobility, less well-resourced governments and municipalities can minimise up-front spend to avoid a costly trial and error approach. Collective thinking can deliver relevant, personalised solutions that tackle the specific challenges of each city.

4 **SHARING IS TRANSFORMATIVE**
Identifying cities most receptive to sharing schemes gives OEMs extra confidence for partnering with local authorities or innovative service providers when launching their own initiatives.

Successfully integrating mobility across vast, complex urban environments is one of the greatest challenges facing legislators, municipalities, mobility providers and car manufacturers. But done well, it has the potential to secure the future prosperity and wellbeing of citizens and the cities in which they live, work and travel through each day.

Our Mobility Futures study offers a comprehensive overview and city-by-city analysis of current mobility provisions and the potential for future improvement.

"Putting the 'human' into the centre of the research, in order to understand actual mobility needs and to forecast future mobility behaviour, has unveiled interesting results."

Stefanie Holzwarth,
Urban Mobility Unit, UN-Habitat

Get in touch

Want to know more about urban mobility and why people make the choices that they do?
We'd love to help you develop successful strategies to prepare for the future of mobility.

Get in touch with our mobility experts by emailing us at **mobilityfutures@kantar.com**

KANTAR

Kantar is the world's leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else. Combining our expertise in human understanding with advanced technologies, Kantar's 30,000 people help the world's leading organisations succeed and grow.

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