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# *At the Wheel with Gen Z Charting the Roadmap for Future Urban Mobility*

This article explores current and future urban mobility preferences and behaviors of Gen Z in the context of developing smart, sustainable cities. Using a mixed-methods approach, the study identifies four clusters of Gen Z urban movers and their mobility preferences, providing insights for urban mobility companies and highlighting challenges, opportunities, and the need for tailored solutions and educational initiatives for young urban consumers.

URBAN MOBILITY//FUTURE MOBILITY//GENERATION Z//SUSTAINABILITY//MIXED METHODS



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The UN's 2030 Agenda emphasizes the pivotal role of mobility in the Sustainable Development Goal 11 (SDG 11), focusing on safe, affordable, accessible, and sustainable transportation (United Nations, 2023). In parallel, the European Green Deal aims to achieve climate neutrality by 2050, highlighting sustainable and smart mobility initiatives and investments in clean technologies (European Commission, 2023). These urgent calls emphasize the necessary global commitment to sustainable mobility.

Generational change is considered one of the key factors in the evolution of society. Gen Z is now entering adulthood and already accounts for

more than 40% of consumers in some countries. Consequently, these young people play an essential role in the market, and that includes mobility (Wawer et al., 2022). As the United Nations estimates that 70% of the world's population will live in urban areas by 2050 (United Nations, 2023), a better understanding of Gen Z, who will make up the majority of urban dwellers, becomes paramount. As a consequence, this article focuses on the following research questions:

- What are the values of Gen Z – and more specifically, what are their value drivers in the area of urban mobility?
- What are the differences within Gen Z?
- What are their current and future preferences for different mobility solutions?

The answers to these research questions are based on the findings of the 2023-24 Research Program conducted by the Mobius Lab of SDA Bocconi School of Management, focusing on the future of urban mobility for Gen Z. The study takes a new perspective based on a practice-based view (Schatzki, 1996; Schau et al., 2009; Akaka et al., 2022), which emphasizes the importance of practices, repeated activities, and behaviors in understanding how individuals engage with the world. Such a view is useful for understanding current and future consumption patterns because it shifts the focus from seeing consumption solely as individual choices or preferences to recognizing it as embedded in broader social practices, such as routines and habits, implicit behaviors, and social contexts. Examining Gen Z's consumption patterns, and especially their relationship to urban mobility, through the lens of a practice-based view is beneficial precisely because it allows us to explore the practices that shape how young people interact with mobility in their everyday lives (now and in the future). Such an approach looks at the underlying values of behavior to explain for today and predict for tomorrow how Gen Zers will make their mobility choices.

This study adopts a mix of different methodological approaches to fully understand the phenomenon: i.e., exploratory methods based

on primary data collection (42 in-depth interviews, 2 focus groups, and observations); secondary data analyses, including text and image analysis on Instagram and TikTok (128,447 Instagram and TikTok captions and 40,414 Instagram images excluding ads); and an extensive quantitative survey with 8,137 respondents from six European countries (Italy, Germany, France, the UK, the Netherlands, and Spain).

Ultimately, the study aims to (i) identify the Gen Z value drivers that inform young consumers' current and future mobility preferences; (ii) investigate what types of urban mobility movers exist (i.e., which clusters); and (iii) understand how these value drivers are associated with different mobility modes.

## GEN Z'S VALUES REVEAL THE DRIVERS OF THEIR MOBILITY CHOICES

Gen Z, the first generation to come of age in the 21st century, is typically referred to as the cohort of “digital natives” (Addor, 2011), “the Internet Generation” (Lanier, 2017), “Generation Me” (Bennett et al., 2012), or “Mobile Mavens” (Ozkan and Solmaz, 2015). These individuals, born between 1996 and 2010 (McKinsey & Company, 2023), represent the first generation that may live into the 22nd century (Aggarwal et al., 2022); they have grown up in a dynamic and turbulent environment that contributes significantly to shaping their identity. This explains the relevance of childhood and places of origin for Gen Z. The research shows that young consumers are anchored in routines and habits that are “inherited” and learned from parents and teachers (from Generation X) in terms of how they perceive spaces, places, and make consumption choices. The implications of this imprinting are profound and extend to the context of urban mobility. In fact, both qualitative and quantitative data show that familiarity and repetition are crucial factors in shaping attitudes toward mobility modes and perceptions of the urban landscape. Young people

find comfort in repeated routes and familiar modes of transportation, as the following quote from an in-depth interview illustrates:

**“It’s reassuring to always have the same route and means to go to work. You know how much time you have to sleep, or read...”**  
(F, 23, ROMANIA)

Overall (and with strong priming from their families of origin), Gen Z individuals appreciate values such as simplicity (e.g., options that are easy to use and immediately available), stability (e.g., options that allow them to feel safe and secure while allowing for work-life balance), sociality (e.g., options that facilitate interactions and connections with relevant others), and sustainability (e.g., options that are environmentally friendly – even if individual behavior cannot always live up to this ideal). These values (most of which emerged from the exploratory qualitative study) also impact the underlying motivations that guide Gen Z’s preferences and choice of mobility modes. In fact, when asked what characterizes the ideal mobility mode (regardless of the specific mode), Gen Z respondents indicate a clear yet nuanced set of priorities. Differences in responses between Gen Z students and workers are highlighted because this distinction allows us to capture the evolution of preferences as young individuals grow up and transition through their life cycle. Accordingly, Figure 1 shows the performance relevance scores<sup>1</sup> for each mobility mode (i.e., transportation mode) for Gen Z students and workers.

Four key findings emerge from our analysis. First, Gen Z has clear priorities when it comes to choosing among mobility modes, with functionality and risk avoidance being the most important. Immediate availability, cost-effectiveness, and cost predictability are also

paramount for functionality, while feeling safe from aggression and traffic-related risks both carry significant weight for risk avoidance. These preferences suggest that Gen Z is seeking a mix of efficiency (especially in terms of time and cost) and physical-psychological safety when choosing mobility solutions. From this standpoint, a mode of transportation that can provide door-to-door pickup and drop-off not only increases convenience, but also augments the overall perception of safety, especially for students.

Second, economic considerations also play a crucial role: young consumers place a high value on cost-effectiveness, cost predictability, and paying only for actual use.

This attention to reducing cost uncertainty suggests that mobility providers should offer transparent pricing models such as flat rates (e.g., subscriptions) or pay-as-you-go options, both of which allow users in different ways to control the actual cost of the chosen mobility mode.

Third, the experiential aspect of mobility also contributes to Gen Z decision-making. Ease of use, comfort, acceptable levels of crowding, and the possibility to engage in other activities while on the move are all deemed important. This finding highlights the need for mobility providers to enhance not only functional and economic aspects, but also the overall travel experience when marketing mobility solutions.

Fourth and finally, the study reveals differences between Gen Z workers and students. This can be inferred from the smoother intensity decay of workers’ scores from one performance to another (in the graph) compared to students, meaning that workers consider many performances important and need to consider them simultaneously, making their decisions regarding mobility modes more difficult. Indeed, the first four performances are all perceived as a top priority for Gen Z workers

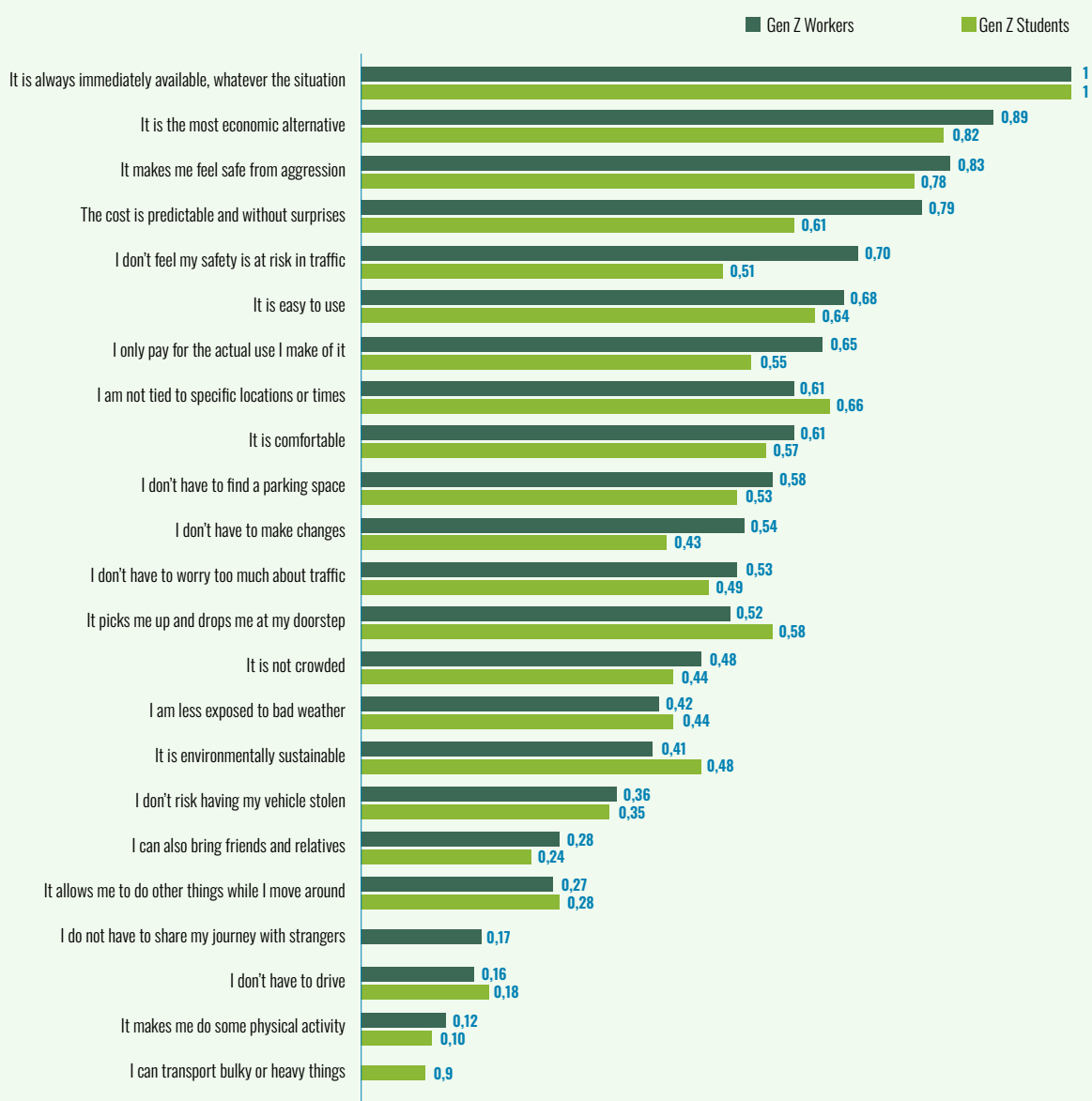
<sup>1</sup> Relevance scores are calculated with the MaxDiff methodology. That is, in the survey, each respondent was given sets of four randomly assigned performances out of a panel of 23 (the ones listed in Figure 1). For each set, the respondents had to select the most and least important performance. The overall difference (i.e., for all respondents) - how many times a performance was rated as most important minus how many times as least important - provides the relevance score. Results are then standardized to allow comparisons: the most important performance is assigned a value of 1, while the least important a value of 0.

(with scores ranging from 1 to 0.79), while there is a steeper decline for Gen Z students (from 1 to 0.61). This suggests that intercepting Gen Z individuals as they enter the workforce presents a strategic opportunity for mobility companies to adapt and simplify their offerings, recognizing the changing habits and preferences of this transitional phase of young people's lives. Milestones (e.g., entering the workforce) also emerge as relevant factors for younger, upcoming generations.

## FOUR CLUSTERS OF GEN Z URBAN MOVERS

The priorities identified in the European multi-country survey suggest that Gen Z is far from homogeneous, which is in line with observations by Wawer and colleagues. As these authors note: "The idea of generational stratification [...], as every generalization, creates a very simplified model of reality that does not address the heterogeneity of Gen Z members" (Wawer et al., 2022, p. 9). In fact,

FIGURE 1 PERFORMANCE RELEVANCE SCORES OF MOBILITY MODES FOR GEN Z (STUDENTS VS. WORKERS)



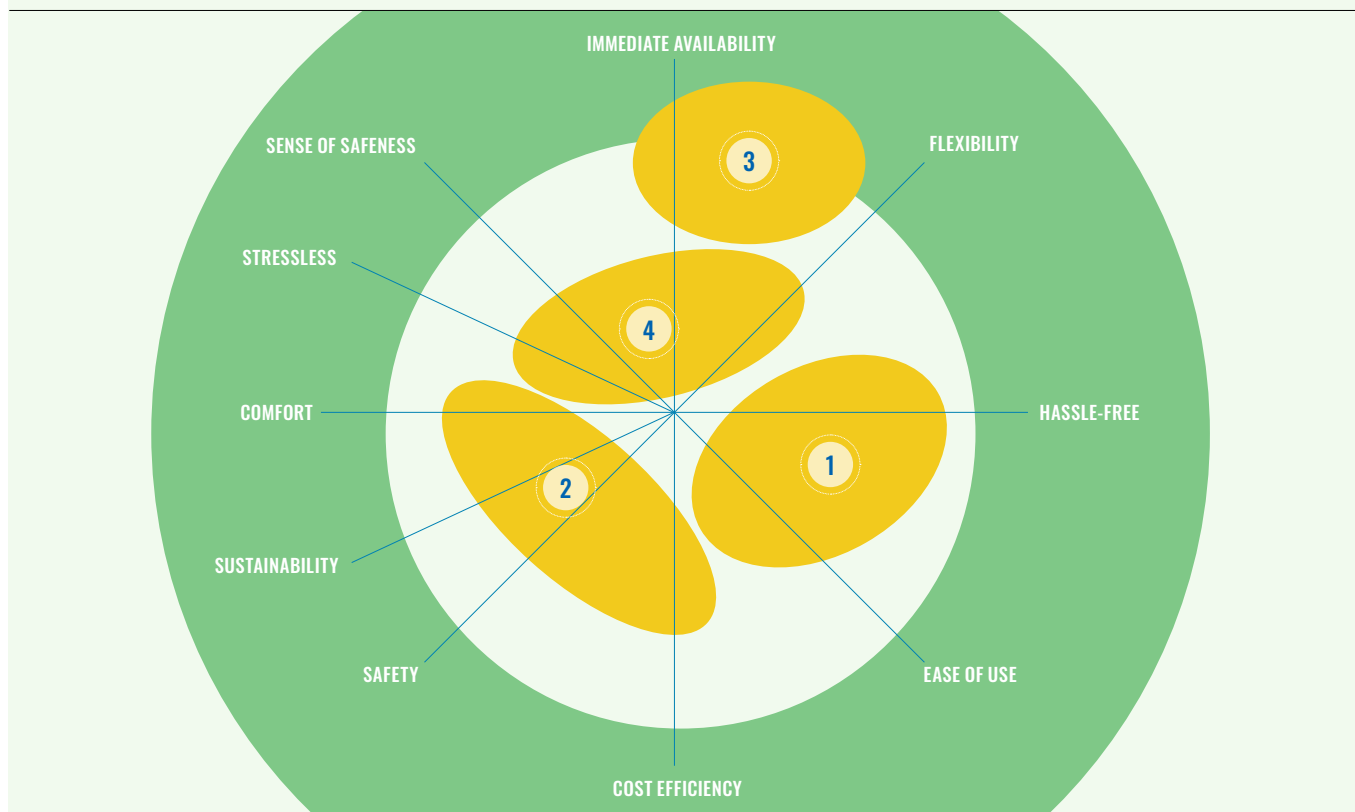
differences between Gen Z students and workers are not the only ones we find. The relevance scores of the expected performances show that not only are decision-making processes nuanced, but preferences are also unevenly distributed. In that respect, our analysis unveils four clusters of preferences that guide Gen Z's choices of urban mobility modes.<sup>2</sup> These clusters are visually depicted in Figure 2; the different labels represent aggregations of the performance priorities identified in Figure 1:

- Stress-free (I can do other things while I move around; I don't have to drive).
- Feeling safe (I get picked up and dropped off at my doorstep; I don't risk having my vehicle stolen; it makes me feel safe from aggression; I don't have to share my journey with strangers).
- Flexibility (I can bring friends and family; I can transport bulky or heavy items).

- Immediate availability (it's always immediately available, whatever the situation; I don't have to make changes; I'm not tied to specific places or times).
- Cost-effectiveness (it's the most economical alternative; I only pay for what I use; costs are predictable, no surprises).
- Comfort (it's not crowded; it's comfortable; I'm less exposed to bad weather).
- Sustainability (I'm getting some exercise; it's environmentally sustainable).
- Hassle-free (I don't have to find a parking space; I don't have to worry too much about traffic).
- Ease of use.
- Safety (I don't feel that my safety is at risk in traffic).

Cluster 1 (28%): This Gen Z group's primary objective is to minimize inconvenience when navigating the city. They are willing to sacrifice

FIGURE 2 THE FOUR CLUSTERS OF GEN Z URBAN MOVERS



<sup>2</sup> The clusters were identified using the k-means criterion based on the priorities outlined in Figure 1.

comfort to reduce the need to park and navigate city traffic. Ease of use is a significant driver for them to reduce hassle. Economic considerations are also paramount; these individuals are concerned about transportation costs and are interested in low-cost solutions. Environmental costs are not considered: they prioritize flexibility over sustainability.

Cluster 1, which includes more workers, women, and households with children, uses a variety of transportation modes, including public transport, and sharing and pooling solutions. They are heavy users of apps for multiple mobility services.

Cluster 2 (16%): This Gen Z group prioritizes comfort as a key factor when choosing transportation modes. They prefer less crowded, weather-protected modes and prioritize comfort over navigating traffic or finding parking. Ease of use, sustainability, cost efficiency, and safety in traffic are highly valued. This cluster primarily uses public transport, with a focus on comfort. They use cars less frequently, do not often ride bicycles or motorcycles, and avoid sharing services.

Cluster 3 (28%): This Gen Z group values immediate availability and accepts the trade-off with cost efficiency. Composed primarily of men, workers, and parents, this cluster uses multiple modes of transportation, with a preference for individual options such as cars, taxis, scooters, bicycles, and motorcycles. They use public transport less frequently.

Cluster 4 (28%): This Gen Z group consists of individuals who prioritize a sense of safety when choosing an urban mobility mode. They are concerned about aggression, theft, and proximity to unfamiliar people. They also prefer modes that allow them to engage in other activities while in transit, and they want instant availability. They'll sacrifice sustainability in favor of flexibility. With more women and students and fewer people with children, Cluster 4 relies heavily on public transport and uses micro-mobility modes sparingly;

they prefer walking. They also use apps for mobility services.

The analysis of Gen Z urban movers reveals a diverse set of mobility preferences, challenging the notion of generational homogeneity. By identifying four distinct clusters, we shed light on the multifaceted decision-making processes that guide urban mobility choices.

From those who prioritize convenience and minimize inconvenience to those who emphasize safety and comfort, our findings reveal the need for tailored approaches in designing future urban transportation solutions.

## GEN Z'S URBAN MOBILITY MODES PREFERENCES

Values and choice drivers influence Gen Z's urban mobility preferences (see Figure 3)<sup>3</sup> and help us understand why these young people prefer certain modes over others.

We can observe that Gen Z students predominantly use either public transport or they walk, while workers rely more on individual mobility modes (e.g., car, taxi/Uber, bicycle). This phenomenon is a consequence of a daily schedule that becomes more rigid as young people enter the workforce, making their commuting choices less flexible. When workers must adhere to strict timetables, they have fewer opportunities to avoid peak traffic periods. Consequently, workers tend to diversify the range of mobility modes they use to increase flexibility in response to the need to accommodate the rigidity of their daily schedules, as illustrated by the following quote from our in-depth interviews:

**"When you start working, you can't afford to lose time anymore...Time is a scarce resource, and you don't want to waste it." (F, 24, ITALIAN)**

<sup>3</sup> The graph displays the average score of responses regarding the frequency of usage for each mode of transportation, measured on an anchored Likert scale ranging from "Almost never" = 1 to "Very often" = 5. The scores are adjusted for the availability of the transportation mode in question in the respondent's city.

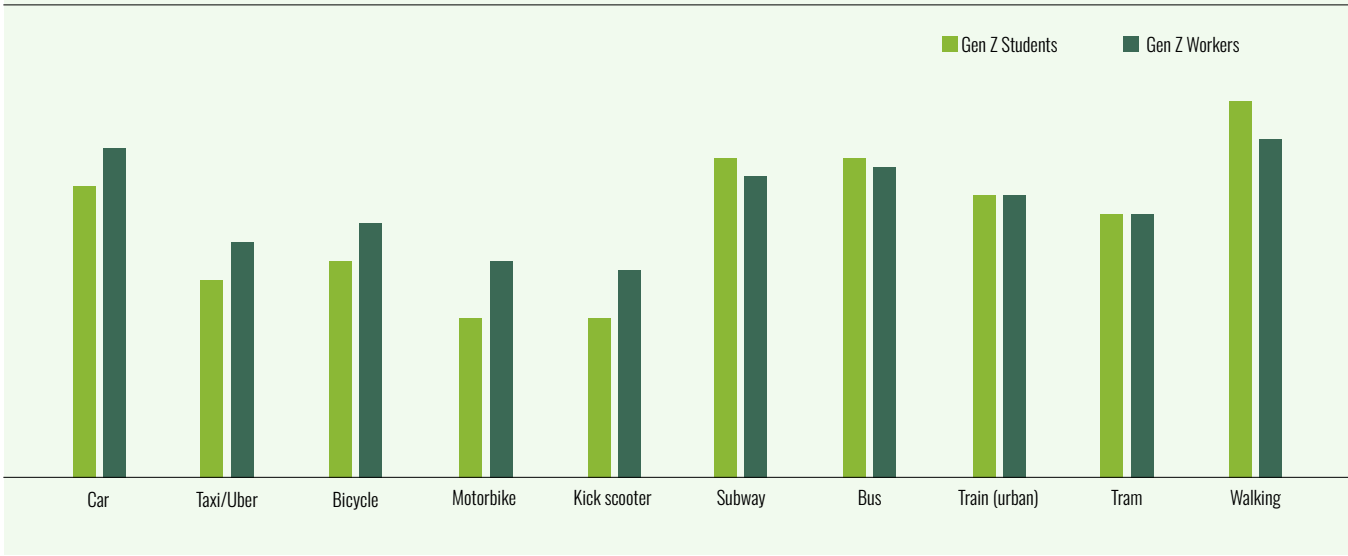
By running regressions on mobility modes according to different priorities, we measured the statistical correlation between usage and priorities.<sup>4</sup>

Walking emerges as the preferred mobility mode for Gen Z overall. Its appeal lies in its freedom, flexibility, utility in terms of physical exercise and detoxing, and the opportunity to enjoy the cityscape or socialize with friends. When experiencing a city as a tourist, this preference is even more pronounced: 84% of respondents said they would walk even very long distances. When it comes to daily mobility, Gen Z students also prefer going on foot, especially in situations where they can establish habits, such as during commuting and repeated journeys. Indeed, they typically walk between 15 and 30 minutes. However, it is not always possible to maintain this healthy habit when entering the workforce, so Gen Z is increasing its use of other mobility modes. This suggests that mobility companies should try to intercept Gen Z individuals as they transition from students to workers: in this window, young consumers are establishing new habits, and mobility providers have the opportunity to be chosen as “new” travel companions.

Public transport stands out as the first choice for Gen Z, especially in city centers where the network is efficient and widespread. This preference is rooted in the economic, environmentally sustainable, convenient, and stress-free experience offered, as well as the ability to make productive use of travel time. Subways, and especially buses, are widely used because of their fast and extensive connections. Buses are perceived to be cost-efficient, reduce traffic stress, provide a good level of safety, and are easy to use. Subway use, on the other hand, is a balancing act, as Gen Zers weigh cost-efficiency against a sense of insecurity. The interviews also reveal an appreciation for trams (especially vintage trams), where available, as they provide a romantic view of the city from an aesthetically-pleasing means of transport.

Due to concerns about accidents safety, cost efficiency, the stress of driving in traffic and parking, cars are perceived quite negatively by Gen Z. Nonetheless, they still hold significance in certain cases. For example, Gen Zers highly value the psychological sense of security that cars provide. Additionally, while daily car use is lower, these vehicles are still essential for weekend

FIGURE 3 USE OF MOBILITY MODES BY GEN Z STUDENTS AND WORKERS



<sup>4</sup> This analysis was run by using a linear regression model that considers only priorities as independent variables. The relationships are weak, as numerous other variables impact observed behaviors in complex contexts such as urban mobility, but statistically significant. Therefore, these regressions provide clues about transportation perceptions, at least by noting the sign of the correlation.

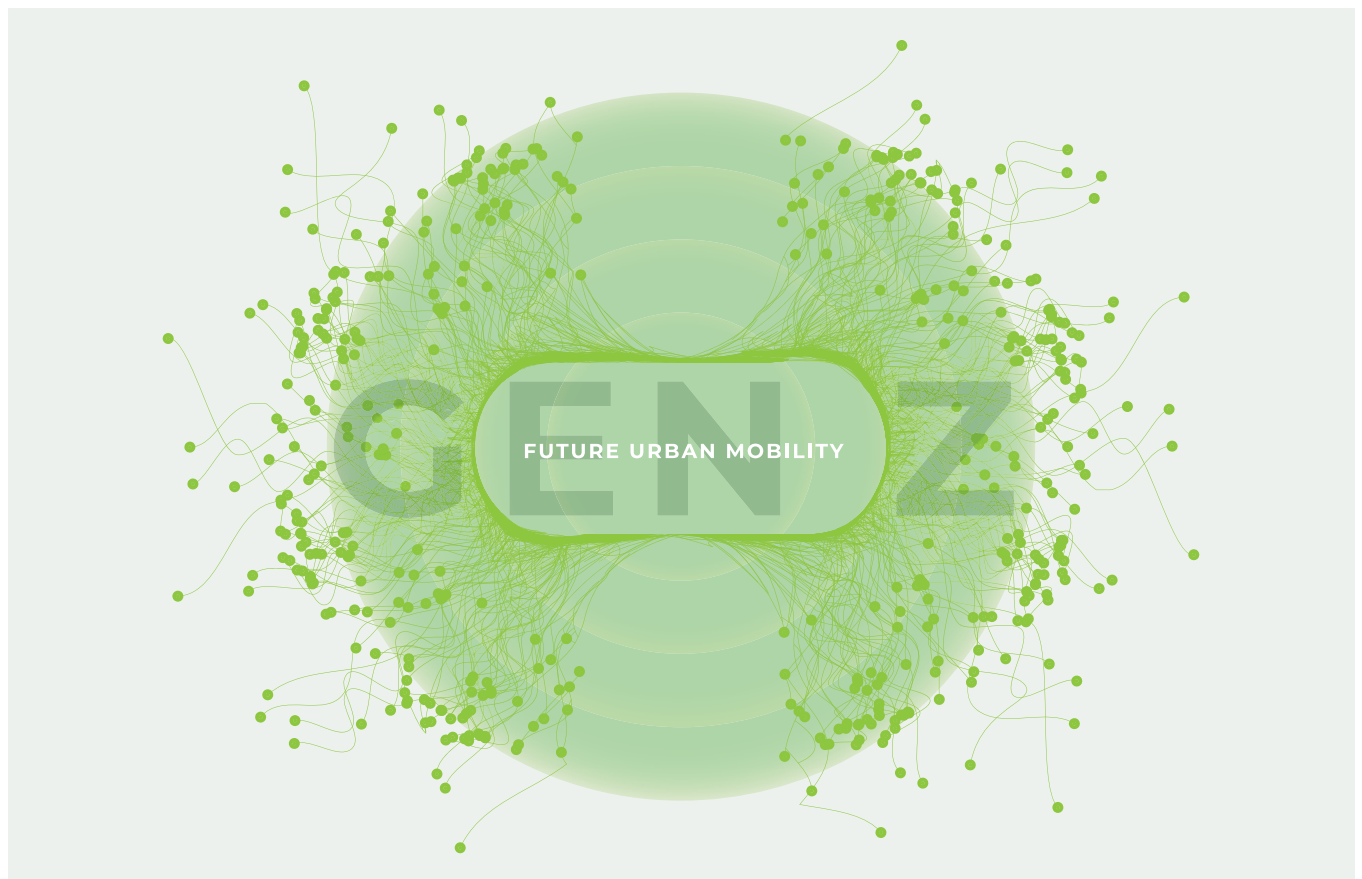


getaways to destinations not well served by public transport, such as the countryside, lakes, or other cities. Looking ahead, especially in the context of potential future family considerations, cars are seen as indispensable vehicles. In fact, 53.9% of Gen Z workers use a car often or very often during the week for commuting and repeated trips around town, compared to 36.4% of Gen Z students. This finding suggests that young consumers will continue to rely on cars as they enter the workforce and start families.

Taxis, ride-hailing, and shared mobility are considered useful options for tourism and occasional travel – such as for nights out, emergencies, transport strikes, or when time is critical. Taxis and ride-hailing are also positively correlated with a sense of safety and security, as they reduce the stress of driving in traffic. Conversely, they are perceived as expensive and potentially not readily available when needed. It is worth noting that 57.7% of Gen Zers surveyed

said they never use car sharing, highlighting that young people are not yet reliant on this mode of mobility. The tendency to experiment with car sharing seems to increase as Gen Zers enter the workforce. Moreover, once they tried it, 15.7% of Gen Z students and 30.8% of Gen Z workers said they became regular users of car sharing. This suggests that usage-based solutions may be a viable option when people need a car. In addition, the preferred typology of car sharing service is station-based rather than free-floating. Importantly, this preference is particularly pronounced among actual users of these services, indicating a genuine preference and not only a mere perception. This would indicate that even though Gen Zers value flexibility overall, they prefer rules and fixed patterns when approaching an unfamiliar mobility mode. This information can be useful for municipalities and mobility providers in terms of designing offerings.

Indeed, Gen Z also seems to prefer station-





based services for shared micro-mobility (bicycles and kick scooters). Overall, these young people seem to consider and use micro-mobility options (both owned and shared) as a “second-best” choice for short or occasional trips. Micro-mobility is unsuitable for work purposes and adverse weather conditions but serves as a viable alternative for late-night trips when roads are less congested. Specifically, the use of bicycles is perceived positively by Gen Z in terms of flexibility and sustainability, but negatively in terms of safety. Bike sharing has additional negatives: high cost, difficulty of use, and the fact that it may not be readily available. Nonetheless, bicycles seem to be appreciated for repeated leisure outings and tourism purposes.

The use of kick scooters is associated with flexibility, sustainability, and the ability to alleviate traffic stress thanks to their maneuverability. Conversely, such scooters are associated with high costs, the perception of being difficult to use and generally dangerous. In the case of shared kick scooters, the lack of comfort and the risk of poor availability are added to the equation. As a result, they are mainly used at night when the streets are empty or when alternative public transport options are limited; otherwise, they are mostly seen as a form of entertainment. As another micro-mobility option, motorcycles are associated with flexibility and are less affected by traffic congestion; they are also positively linked to sustainability but considered expensive.

With respect to the different sharing brands on the market, Gen Zers seem to see them as interchangeable when it comes to choosing a micro-mobility mode. What really makes a difference is the ease of use of the app. Once they opt for a brand, Gen Z users exhibit loyalty (although it may be passive, based on habit) and perceive any potential switching costs as prohibitive. Moreover, the various micro-mobility offers are seen through a unique lens by Gen Z, with no distinctions between traditional and electric options. However, given the often-challenging conditions in European cities (narrow streets and bike lanes, cobblestones,

etc.), there are safety concerns regarding micro-mobility that affect all brands, as highlighted in the following quote from one of the focus groups:

*“I have biked a few times in the city center, but it was not a very nice experience, especially in the center. Plus, the fact that when you go to areas like the ring road, there is not always a bike lane, so you are always a bit in the middle of the road with all the traffic. Also in other cities, it’s a bit of a risk.” (F, 23, SAN MARINO)*

In essence, Gen Z exhibits clear preferences when it comes to urban mobility. Each mode offers a mix of advantages and disadvantages, showing that there does not appear to be a dominant mobility mode in the current context.

While Gen Zers have a clear idea of mobility priorities and value drivers, they use different means of transport depending on specific contextual needs. For this reason, understanding Gen Z’s habits, mobility choices, and preferences is key for mobility providers.

## CONCLUSIONS

The focus of this article was on how Gen Zers experience urban mobility and cityscapes, considering their priorities, preferences, and the modes of transportation they use, while identifying potential differences between Gen Z students and workers, with and without children, today and in the future.

Our analyses revealed the existence of a multifaceted, dynamic set of priorities that influence urban mobility choices and preferences. Young consumers carefully assess and compare the performance of various transportation modes and select them according to a different set of priorities, with immediate availability being the most critical consideration, followed by economic efficiency, uncertainty reduction, safety, and travel comfort. These priorities differ between students and workers, with the latter ranking multiple factors at

similar levels, given the greater complexity of their mobility decisions.

The research also allowed us to identify four clusters, i.e., four distinct mobility preference profiles within Gen Z, ranging from people who prioritize convenience and ease of use to those who emphasize safety, flexibility, and comfort.

In examining how these priorities shape Gen Z's choices, it is worth noting that students express a clear preference for walking and public transportation, while workers tend to favor individual modes of transportation (i.e., services like car sharing and electric scooters) due to their flexibility. When it comes to mobility sharing services, Gen Z prefers station-based options due to their increased safety and reliability compared to free-floating options. While Gen Z shows interest in the sustainability and practicality of micro-mobility options such as bicycles and scooters, concerns about safety and availability seem to prevail so far.

## MANAGERIAL IMPACT FACTOR

- **Tailored mobility solutions:** develop and offer transportation options that address different consumer segments and their specific preferences.
- **Reducing uncertainty:** implement strategies to reduce uncertainty about availability, travel time, and final price of transportation services.
- **Communicating efficiency and reliability:** prioritize clear communication about the efficiency and reliability of transportation solutions and address any information gaps through market education.
- **Understanding usage patterns:** analyze and leverage mode usage patterns based on consumer priorities to help Gen Z effectively manage their transportation trade-offs and integrate urban mobility into the broader smart city ecosystem for future quality of life improvements.
- **Competitive differentiation:** focus on providing safe, comfortable, easy-to-use, and customizable transportation options to differentiate from competitors.



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