

The Drivers of Change in Urban Mobility

Urban mobility is not a concept that necessarily conjures positive associations. Transportation systems are often at the center of criticism in discussions around the green transition – and with good reason. According to the European Environment Agency (2022), the transport sector is the only segment in the broader energy system that where CO₂ emissions have increased since the end of the twentieth century. Moreover, urban traffic has progressively become an objective constraint on individual freedom. To travel just ten kilometers in the city, it takes a London resident an average of 36 minutes, while someone living in Milan needs 27 minutes, according to TomTom (2022). Urban space, in turn, is flooded by four-wheeled vehicles, which occupy up to 85% of the available public space (FIAB, 2025) and remain stationary for 92% of the time (Heck and Rogers, cited by the European Commission).

At its core, urban mobility remains structurally inefficient precisely because it continues to be a largely private affair. Even in Europe's most advanced cities (such as Paris, Stockholm, or Stuttgart), the proportion of citizens who use public transport as their primary means of mobility barely exceeds 50%. And these places represent best practices, not the prevailing standard. Given that approximately half of the people in the world already reside in urban centers, and that these populations are expected to grow by 40% over the next twenty-five years (World Bank projections), it's clear that rethinking and redesigning urban mobility constitutes both a right and a responsibility for citizens, policymakers, and scholars alike. But fundamentally, this is an extraordinary business opportunity too: As the saying goes, solve a trillion-dollar problem if you want to create a billion-dollar business.

This Focus brings together a selection of research produced by the mobiUS Lab (Smart & Sustainable Mobility Lab) at SDA Bocconi during 2024 and 2025. The research addresses multiple dimensions: the adoption of zero-emission powertrains; the uptake of shared and rental mobility services; and the influence of “soft” factors, such as the value systems guiding younger generations toward new mobility paradigms. The analysis reveals a market characterized by an appreciable openness to innovative mobility solutions, yet guided by pragmatism, cost awareness, and sensitivity to context and purpose of use. Whereas the traditional view portrays citizens as individuals who rely on private transport when possible and on public transport when necessary, current data suggest a shift toward a “polymobility” model – where users move fluidly among owned, rented, and shared modes of transport depending on their situational needs. Such a scenario expands the scope for new business models but also raises strategic questions for organizations seeking to build broad, stable, and loyal customer bases. Finally, in an environment where the positive and negative externalities of individual mobility choices are increasingly visible and tangible, these patterns of warrant careful reflection by public administrators and policymakers, particularly in relation to the infrastructural investments required to enhance the efficiency and sustainability of urban mobility systems.

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