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FROM HISTORICAL PATTERNS TO FUTURE TRAJECTORIES TRACING THE EVOLUTION OF GEN Z'S MOBILITY PRACTICES

This article examines how Generation Z's mobility behaviors evolve across time – rooted in early-life experiences, reshaped through present transitions, and projected into future mobility choices. Drawing on qualitative research across major East Asian and Indian cities, we trace how emotional memory, technological adaptation, and pragmatic decision-making interact to guide emerging approaches to mobility. Our findings reveal a shift from fixed habits toward flexible, context-dependent “polymobility,” where convenience and integration outweigh ideological motivations. By connecting past patterns, current adaptations, and future decision nodes, the study offers actionable insights for policymakers, brands, and cities designing user-centric, sustainable, and life-compatible mobility systems.

GENERATION Z//URBAN MOBILITY//SUSTAINABILITY//POLYMOBILITY//USER-CENTRIC DESIGN



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As the first generation born and raised in a world of ubiquitous digital technologies, Gen Z has developed distinct habits, giving rise to new consumption patterns that challenge conventional wisdom (Aktan and Kethüda, 2024; Chang, 2022; McKee et al., 2024). And urban mobility is no exception (Wawer et al., 2022). To unpack Gen Z's relationship with mobility and trace the evolution of their mobility behavior, this article is structured around three key temporal pillars – past, present, and future. We begin by examining how early-life experiences, family routines, and brand exposure condition foundational mobility attitudes. We then explore the transitional and sometimes contradictory habits observed in the present, as young people navigate changing roles, technologies, and obstacles. Finally, we look ahead to the decision points and systemic factors that will

influence future mobility choices, highlighting how institutions and mobility brands can act today to mold tomorrow's behaviors.

In a global context where sustainability discourse often leans on ideals and awareness campaigns, in this article we take a different angle: We look at how behaviors evolve over time – not always in line with intention, but shaped by daily experiences, constraints, and perceived convenience. Past habits carry emotional weight; present routines are determined by structural and technological transitions; and the future will be defined less by beliefs than by solutions that make sense to users economically, socially, and practically.

By focusing on Gen Z, the demographic that will increasingly drive demand across urban mobility systems, the aim of this article is to uncover patterns that are already forming the basis for long-term change. Through qualitative insights and lived experiences, we highlight how mobility behaviors are not fixed but constantly evolving, and how understanding this trajectory can help cities, companies, and policymakers design for a scenario of the future that is more adaptive and realistic.

These dynamics are examined through three core research questions that mirror the temporal structure of the study:

- How do early-life experiences and family environments shape Gen Z's foundational mobility attitudes and expectations?
- What characterizes Gen Z's current mobility behaviors, and how are these characteristics dictated by transitional life stages, technologies, and urban conditions?
- Which personal, institutional, and infrastructural factors are most likely to impact Gen Z's future mobility decisions, and how can brands and cities act today to guide these emerging trajectories?

Taken together, these questions connect personal histories, present-day constraints, and future scenarios, offering a comprehensive view of how mobility behaviors are formed, and how they might be steered more intentionally going forward.

The answers are based on the findings from the 2024–25 research program of SDA Bocconi School of Management's Mobius Lab, the research center that focuses on smart and sustainable future mobility. Specifically, the analysis draws on data collected from 52 Gen Z informants (aged 16–30) across more than 20 major cities in China, Hong Kong, Singapore, South Korea, Taiwan, and India. Combining in-depth interviews, ethnography, co-creation tools, and self-recorded video diaries, the study captured not only how these individuals move in urban spaces today, but also how they are imagining, adapting to, and actively mapping out the mobility of tomorrow.

The article is structured in three sections, each anchored to a distinct temporal frame that captures how Gen Z navigates and redefines mobility over time. Rather than viewing behavior as static or ideologically driven, each section explores how habits are formed, reshaped, and projected forward through practices and direct experience. Together, these lenses reveal how emotional memory, transitory situations, and future-facing decision nodes converge to mold mobility practices. Therefore, this work offers valuable cues for cities, companies, and institutions seeking to design systems that are not only sustainable, but life-compatible.

THE PAST REVEALS WHO WE ARE

Early mobility experiences leave lasting imprints, often affecting preferences and attitudes more deeply than we realize. For East Asian and Indian Gen Zers, these foundational scripts are anchored in family routines, cultural models, and early exposure to brands and systems. The mobility choices they experienced as children did more than serve functional needs; they subtly informed perceptions of what is “normal,” desirable, or even aspirational.

In many cases, childhood routines revolved around parental decisions. Being driven to school versus walking, using public transport versus private vehicles: These patterns created emotional associations that still color Gen Z's mobility outlook

today. An example from the research sample is a young woman from Shenzhen who recalled growing up next to a subway station; she continued relying on the subway even after moving to another part of the city. For young people like her, public transport became second nature:

“Since I used to live at an apartment that is really close to the subway station during that time, I usually go out by the subway.”
(Female, 25, Shenzhen)

Others formed attachments not to a specific mode of transport, but to the very idea of travel itself – a connection often rooted in family experiences, as suggested by the following verbatim excerpt:

“I love travelling. It’s not something that has started quite recently, but since my childhood I have been travelling with my family.”
(Female, 23, Mumbai)

These childhood encounters with different modes of transportation often set a personal baseline for what people consider convenient, enjoyable, or even necessary. Building on this, family influence extends beyond daily routines to shape not only habits but also the symbolic meanings attached to mobility. Whether linked to a strong sense of self-discipline (as in East Asia) or to deep spirituality and closeness to family tradition (as in India), we observed that owning a car can symbolize both personal success and a form of filial duty. As one interviewee from Shenzhen shared:

“Since in my childhood, my parents never had a car, so it’s more of their dream rather than my dream to have a car at home. So, maybe, not necessarily for me, but I’ll definitely buy one for them.”
(Male, 25, Shenzhen)

In this context, mobility aspirations are not merely personal goals but also gestures of gratitude or social expectation. Similarly, across East Asia (particularly in places like Singapore and China) the

cultural trope of the “Five Cs” (i.e., cash, car, credit card, country club, and condominium) continues to guide how success and status are perceived. As one Singaporean respondent put it:

“We even put acronyms to know whether we have reached it or not. How many Cs are you at? I’m half a C or I’m at Five Cs.”
(Female, 27, Singapore)

Therefore, these social narratives position mobility within broader systems of achievement and recognition (especially car ownership). Early exposure to mobility brands leaves lasting emotional impressions that often persist into adulthood. In East Asia, Western car brands still carry strong aspirational value (e.g., Ferrari, Lamborghini, Audi, Mercedes, and BMW), while up-and-coming local brands increasingly inspire pride and a sense of cultural identity. In India, a similar dynamic emerges: Attachment to the family’s car and motorbike brands blends with support for local and regional manufacturers like Tata, Maruti Suzuki, Honda, Hyundai, Toyota, Nissan, and Kia. This dual pull, between global prestige and local pride, transforms mobility products into more than mere utilitarian tools; they become markers of status, modernity, and belonging – on both a family and nation level.

Yet perhaps one of the most telling insights from the study is how strongly East Asian and Indian Gen Z remain anchored to the mobility paradigms of their formative years even when envisioning their future journeys. When imagining the future of urban mobility, in fact, most respondents did not foresee radical transformations or entirely new modes of transport. Instead, they projected their present experiences forward, hoping for incremental improvements (more stops, broader coverage) rather than conceptualizing disruptive change. As a young respondent observed:

“We have mainly bus and metros over here. These are the two main ones and for me I feel like there is

no need to go into a third or fourth mode of public transport if we can actually focus on these two.”
(Female, 27, Singapore)

This pragmatic, experience-based view suggests that future mobility systems will be judged less by their novelty and more by their ability to refine and enhance what users already know and trust.

From a managerial perspective, this creates both a challenge and an opportunity. The challenge lies in recognizing that Gen Z's expectations are not created in a vacuum; they are deeply informed by the latent scripts written in childhood and adolescence. Efforts to introduce new mobility solutions must account for these ingrained preferences and emotional reference points. On the other hand, the opportunity lies in leveraging these past experiences as anchors for innovation. By building on familiar habits and upgrading known systems, mobility providers and policymakers can foster adoption and trust, tapping into a reservoir of cultural and emotional capital that already exists.

These dynamics underscore a critical observation: Mobility behaviors are not just responses to current needs, but reflections of formative experiences. The past does not just inform the present; it crafts the lens through which we imagine the future. Recognizing and engaging with these deep-seated patterns can help cities, companies, and institutions design mobility ecosystems that resonate authentically with the generation that to a great extent will be driving urban demand.

THE PRESENT IS A MOVING TARGET

If the past sets the frame, the present tests its limits. East Asian and Indian Gen Z's current mobility behaviors are marked by fluidity, experimentation, and at times, contradictions. Rather than revealing consolidated habits, these patterns reflect a transitional life stage – a passage from dependence to autonomy, from student to worker, from familiar environments to new urban contexts. This in-between phase fosters adaptive choices that are often more about coping with present constraints than expressing long-term preferences.

Many Gen Zers describe their current mobility decisions as temporary compromises, dictated by financial realities, evolving priorities, and practical necessities. For some, this means postponing milestones like getting a driver's license—not because of disinterest, but because it simply doesn't fit into their current life setup. For instance, a 25-year-old woman from Shenzhen explains her choice in terms of timing rather than refusal, reflecting a common attitude of postponement, not rejection:

“That's why I don't have the driver's license. But yes, I will learn it in the future.”
(Female, 25, Shenzhen)

Others voice a pragmatic awareness of financial limitations, prioritizing savings over mobility aspirations. As a 21-year-old from Midnapore shares:

“I need to save money... so it will take maybe five to six years to buy a good car. If I want to buy a second-hand one, then maybe it will take less.”
(Female, 21, Midnapore)

This reflects a common reality for many East Asian and Indian Gen Z students who make sacrifices and save diligently; they can't afford to purchase or even drive the cars they truly want. These choices highlight how this cohort's present behaviors are often provisional, dictated by circumstance rather than reflecting stable preferences.

A key factor amplifying this adaptive mindset is the physical and social dislocation many young people experience. Whether moving away from their hometown for studies or relocating for work, Gen Zers frequently find themselves navigating unfamiliar urban environments, often with limited resources. In these contexts, reliance on local public transport or shared mobility services may become a necessity rather than a deliberate choice. The emotional connection to family cars or motorbikes formed in childhood remains relevant, but practical considerations dominate day-to-day decisions. Mobility, in this phase, becomes a negotiation

between past attachments, present limitations, and future aspirations.

Technology further accelerates this fluidity. The rise of mobility (super) apps, real-time transit information, and digital sharing platforms has opened up a broad spectrum of mobility options, particularly in cities with advanced urban transport ecosystems, such as Shanghai, Singapore, or Mumbai. These tools encourage situational decision-making (i.e., adapting mode selections based on convenience, cost, or immediacy), fostering a habit of flexibility rather than loyalty to a single system. In such environments, behaviors are shaped less by long-term planning and more by moment-to-moment choices, enabled by digital platforms that make switching between options seamless.

However, this same flexibility underscores a critical insight: Today's behaviors are not reliable predictors of tomorrow's habits. The choices Gen Z makes now – whether driven by economic necessity, technological convenience, or transient life situations – may shift considerably as they acquire financial independence, settle into stable careers, or start families. Yet, this phase of experimentation is far from irrelevant. On the contrary, what these young people are trying, testing, and experiencing now can leave lasting imprints, conditioning future expectations, preferences, and trust. Positive experiences with certain systems can foster loyalty, while frustration or perceived limitations may create long-term resistance. The adaptive behaviors of today are, in essence, the seeds of tomorrow's mobility patterns.

For companies, cities, and policymakers, this dynamic presents both a challenge and an opportunity. The challenge lies in resisting the temptation to treat current Gen Z behaviors as fixed indicators of future demand. Misreading transitional habits as permanent could lead to misguided strategies or misaligned investments. The opportunity, however, is equally compelling: By recognizing this phase as a critical window of influence, mobility providers can design interventions that anticipate change rather than reinforce temporary behaviors. This means enabling

positive experimentation, fostering seamless access, and reducing friction; all this would ensure that the experiences Gen Z has today lay the groundwork for sustainable, reliable mobility patterns in the future.

Ultimately, understanding Gen Z's present mobility landscape requires acknowledging the volatility of this cohort. Their behaviors are not contradictions, but reflections of a generation in motion, testing boundaries, adapting to constraints, and navigating choices in a rapidly shifting urban and technological environment. The present, for Gen Z, is a moving target and anyone seeking to engage them must be ready to move with it.

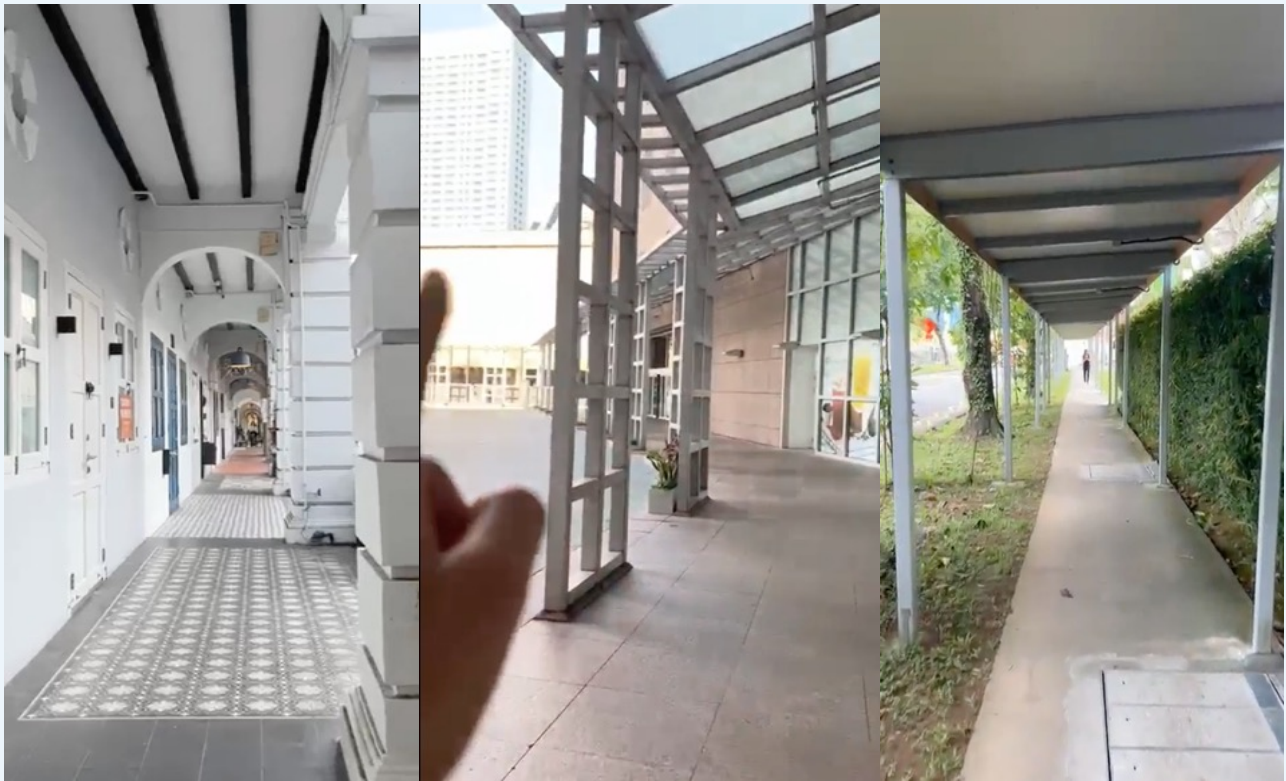
THE FUTURE IS PRAGMATIC

If the past anchors expectations, and the present experiments with possibilities, the future consolidates decisions – not as ideals, but as practical responses to life's turning points. For Gen Z, mobility choices are unlikely to be influenced by ideology alone, whether owning a car, adopting multimodal habits, or embracing electric vehicles. These decisions will crystallize at key life junctions: the first job, moving to a new city, starting a family. These life nodes act as critical points, redefining needs and recalibrating priorities. As a 25-year-old from Shenzhen reflects:

“If I had a family in the future and I had children, I would definitely buy a car. Yes, I would use cars often. But if I live alone and I am a single, I will still use public transportation.”
(Female, 25, Shenzhen)

This pragmatic outlook goes beyond individual circumstances. Policy frameworks, urban infrastructure, and service design will play a decisive role in determining Gen Z's future mobility behaviors. Incentives, low-emission zones, parking reserved for Electric Vehicles (EVs), and integrated micro-mobility in super apps: all these are not just enablers. They can make certain mobility choices feel natural, even inevitable. As

FIGURE 1. FROM DAILY JOURNEYS AS TOLD BY RESPONDENTS: ABOVE-GROUND WALKING UNDER WEATHER-PROTECTED, SHADED WALKWAYS



a respondent from Singapore points out when discussing EV-dedicated parking:

“And because your EV charging stations are reserved for EVs only, you’ll always have a spot in the carpark.”
(Male, 26, Singapore)

In the same vein, in dense urban environments, even seemingly minor interventions can meaningfully affect mobility choices. Case in point: Singapore’s accessible, green, sheltered walkways (Figure 1).

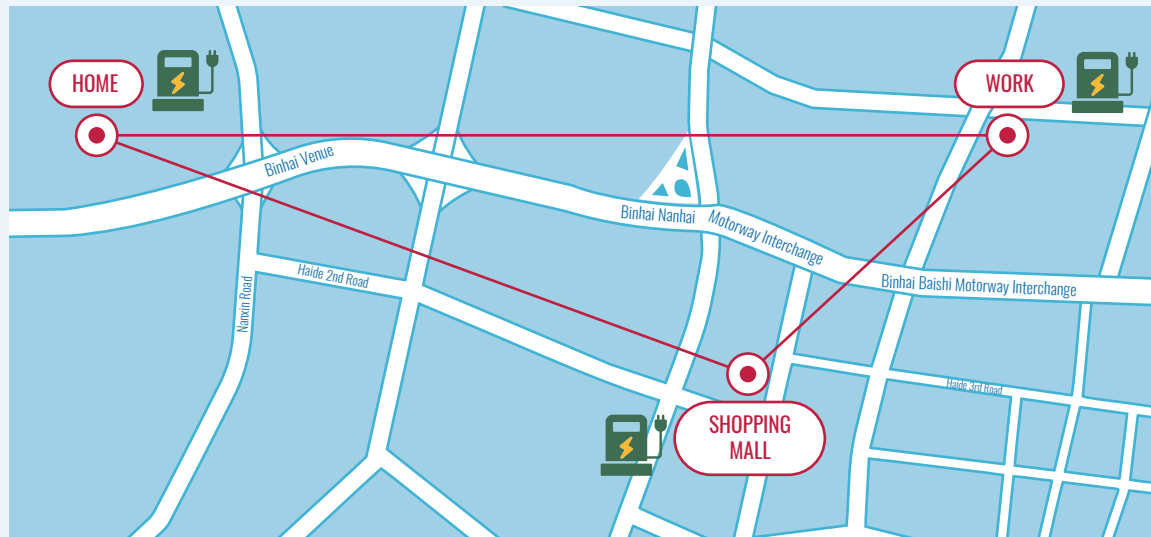
As individuals who value convenience more than green storytelling, East Asian and Indian Gen Z are more receptive to solutions that reduce friction and minimize uncertainty. Take, for instance, the daily routines that respondents narrated. Shaded, weather-protected walkways became valued features of their commutes, subtly reinforcing walking as a preferred option.

At the same time, private actors, especially employers and brands, emerge as key catalysts for new mobility habits. Company-sponsored shuttles in India, for example, don’t just foster a sense of care and community, but first and foremost, they solve logistical challenges and ensure convenience in the daily lives of employees. As a young professional from Kolkata explains:

“I go to the central office, and that’s where they provide the bus transportation. The employees all love it because it makes traveling more convenient.”
(Male, 28, Kolkata)

Super apps also play a crucial role in this ecosystem-building. Platforms like WeChat or Grab, which bundle payments, bookings, and mobility services, go beyond simplifying logistics. They shape how mobility is integrated into

FIGURE 2. FROM THE DAILY JOURNEYS AS TOLD BY RESPONDENTS: ON-PREMISES CHARGING STATIONS (E.G., AT SHOPPING MALLS OR OFFICES)



everyday routines. As a respondent from Shenzhen puts it:

“That includes everything, every aspect of life in WeChat.”

(Female, 25, Shenzhen)

China further exemplifies another dimension of private-sector involvement, where companies often collaborate with commercial venues, such as shopping malls, to offer free EV charging stations and reserved parking spaces, making EV use more convenient and feasible (Figure 2).

From a managerial perspective, the key revelation is clear. Future adoption won't hinge on ideology or aspirations alone; rather it will depend on how seamlessly mobility systems become a part of people's lives. The more accessible, coherent, and frictionless the ecosystem, the more likely it is that new behaviors will emerge and stick. Habits don't form in isolation; they build progressively, carried forward by familiar scripts, tested through lived experience, and consolidated by practical solutions that remove friction.

For mobility providers, this presents both a challenge and an opportunity. The challenge lies in designing systems that go beyond idealistic appeals and instead address the practical realities of Gen Z's daily lives. Without reducing friction and ensuring smooth integration, well-intended offers risk being ignored or abandoned. The opportunity, however, is momentous: By focusing on life-compatible systems that naturally embed sustainable mobility into routine decisions, stakeholders can make smart mobility not just desirable, but the easiest and most obvious choice. This approach fosters habit formation at key life moments, setting the stage for durable adoption.

WHAT MOBILITY DESIGNERS SHOULD DO

Understanding East Asian and Indian Gen Z's mobility means acknowledging the different forces at play across time. The following table summarizes key lessons learned from Gen Z in major cities across East Asia and India, along with actionable implications for mobility planner and providers, both within the Asian context and beyond.

TABLE 1. MOBILITY LESSONS FROM GEN Z AND MANAGERIAL IMPLICATIONS

Lesson Learned	Takeaways for managers
The past reveals who we are	Build on Gen Z's known behaviors rather than forcing disruptive change. Tap into existing symbols, routines, and mobility expectations to foster adoption. Recognize the formative power of past experiences to forecast future demand and guide new solutions. Position new offers as enhancements and upgrades to trusted systems, not as replacements.
The present is a moving target	Recognize that current Gen Z behaviors are transitional. Design flexible, adaptive offers that cater to changing needs rather than fixed usage patterns. Use today's "trial phase" to introduce behaviors and services that can evolve with users. Anticipate shifts by observing how Gen Z navigates trade-offs (e.g., price vs. convenience) and be ready to pivot offers as their life circumstances change.
The future is pragmatic	Focus on reducing friction, ensuring seamless integration and easy access. Drive adoption primarily through practical convenience, rather than relying on ideals or narratives alone. Leverage partnerships (e.g., with employers, commercial hubs, or tech platforms) to embed mobility services naturally into people's routines. Encourage habit formation by offering useful, accessible solutions at the right moment and in the right context.

In conclusion, Gen Z's choices reflect a mix of habit, experimentation, and pragmatism, all

shaped by personal journeys, social environments, and infrastructure. The past leaves a lasting imprint. Early experiences create inertia, anchoring expectations and behaviors that often persist over time. Mobility designers should build on these patterns instead of pushing for abrupt change. The present is inherently volatile. Current behaviors may seem inconsistent or fragmented, but this fluidity is normal in a phase of exploration. Rather than chasing fixed trends, designers should offer flexible solutions that adapt and evolve with users. The future is pragmatic. While values and ideals matter, it's convenience, seamless integration, and reduced friction that ultimately foster lasting adoption. Sustainable choices need to feel like the easiest, most natural option, especially in key life moments when habits are most open to change (such as landing your first job, moving house, or getting new responsibilities).

The opportunity lies in preparing for future tipping points now by designing intuitive, habit-friendly systems that meet evolving needs without forcing disruption. The role of mobility providers, brands, and policymakers is not to "nudge" beliefs, but to design infrastructures and services that make smart mobility the obvious, life-compatible choice.



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