

Arpo

The Mobility Revolution



The new
mobility
scenario from
the perspective
of millennials.

1. How do I want to travel today? p. 1 1
2. Trends, brands and services that are making a mark on mobility p. 1 9
3. What do young people expect from mobility in the years to come? p. 3 1
4. Final Reflections p. 5 1



Millennials 21-39 years old
(10 people, male & female)

In different moments of life:
living at home with their family
or independently, with and
without children, at university
(students), and working

Madrid, Barcelona and Seville

Users of different solutions
and means of transport: own
vehicle, car sharing, bike
sharing, scooter sharing,
motorcycle and scooter
sharing, public transport,
shared trips, long-distance
trains, aeroplanes... People
who travel both nationally and
internationally.

Gain insights on use, attitude
and expectations of this
target in relation to mobility
and brands:

What does it
mean to them
and what do
they expect
from it in the
future?

How do I want to
travel today?





Movement is a vital trait in millennials' DNA.

Arpo Context

This new concept of mobility does not only revolve around “where do I have to go?”, but incorporates a fundamental element: “how do I want to get there?”

The revolution in mobility over the last few years has enhanced this essence, further expanding its possibilities...

A more dynamic, spontaneous, diverse, emotional and “on demand” scenario (especially in large cities) that fully connects with the millennial reality. The rules of the game are changing in accessibility and immediacy (availability in the “here” and the

“now”), in efficiency (“ad hoc” adaptation to changing motivations and needs throughout the day: streamlining, saving time and waiting), in enjoyment (fun, unpredictable, playful and experiential component).

“Regarding current mobility, I value the large number of options that we have nowadays and that make it possible to always do what one feels like doing the most: if one day you don’t feel like driving, you can use public transport calmly reading. If one day you have less time, you take a rental motorbike, bicycle or scooter and you get where you’re going in no time. You decide and always do what you want to do.”



Three main keys to understanding this phenomenon...

Technology

The appearance of apps, services and digital tools that have transformed mobility by placing the user at the center of decision-making and facilitating their day-to-day life.

Liberation of the environment

Young people's inclination towards use vs. possession. The rise of sharing and specific mobility solutions (such as the absence of dependency or ties to a specific means of transport).

Intermodality

The possibility of combining different and successive means to cover the same route makes travel less routine and mechanical. Your own choice breaks the monotony, brings enjoyment and makes moving around fun, relaxing, less stressful... depending on the moment and need.

Long-haul travel has also been transformed, allowing millennials to recognize themselves as a generation passionate about traveling, both nationally and internationally.

Interconnection

Progress in infrastructure, connections and routes between cities and countries. Physical borders are blurred, and travel is more direct compared to the past.

Democratization

Greater accessibility and options for everyone (low cost, offers, shared trips to set off costs).

Immediacy

The digital environment allows spending less time managing and planning trips, doing it less in advance (even at the "last minute") and focusing more on enjoying the experience.



Trends, brands and services that are making a mark on mobility



Regulation

New European laws, regulation protocols, energy labels, restrictions on mobility, ban on petrol and diesel vehicles in coming years.

Sustainability

Awareness of environmental impact and climate change, search for efficiency, relevance of the effects of pollution not only on the environment, but also on health.

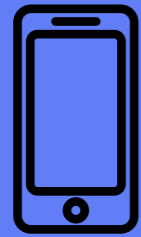
Urban design and planning of public spaces

Increasing importance of the pedestrian and cyclist: pavement, bike lanes, spaces... Closure of streets to traffic, decongestion of city centre, provision of new services (sharing, renting, charging points, connectivity..).

COVID-19

Only essential travel. Overcrowded means of transport are avoided, more of a leaning towards private and individual: car, motorbike, bicycle, scooter... Preference for "surface" and outdoor travel, less long-distance collective travel (plane, train).





Apps

Apps are here to stay due to their immediacy, ease, efficiency and personalization of mobility services.



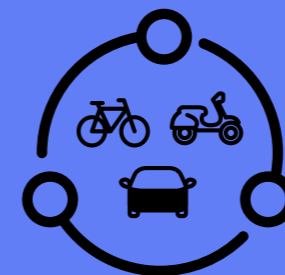
Savings

Young people are strongly committed to solutions that allow them to save the most time and money.



Hybrid Mobility

As a first step towards electric mobility, and a solution to circumvent the restrictions on diesel and petrol.



Sharing & Renting

Raising awareness towards a more responsible, economical, sustainable and circular use of transport.

Not all existing brands and services have been able to connect with young people. The best rated by millennials are:



The electric vehicle accessible to all: autonomy, sustainability and ease



Freedom of movement in the big city



Google Maps

A benchmark of technology, innovation and progress for young people when it comes to moving around



Musts for planning and making "smart" use of public transport



Savings, possibility of socializing and contribution to the environment



The solution of reference, especially when out for the evening

“Waiting for the bus is no longer a thing.”

“Mapping apps save your life because you don’t have to waste time waiting and you can move faster and more efficiently, I don’t know anyone my age who doesn’t have one of these apps on their phone, waiting for the bus to arrive is no longer a thing.”



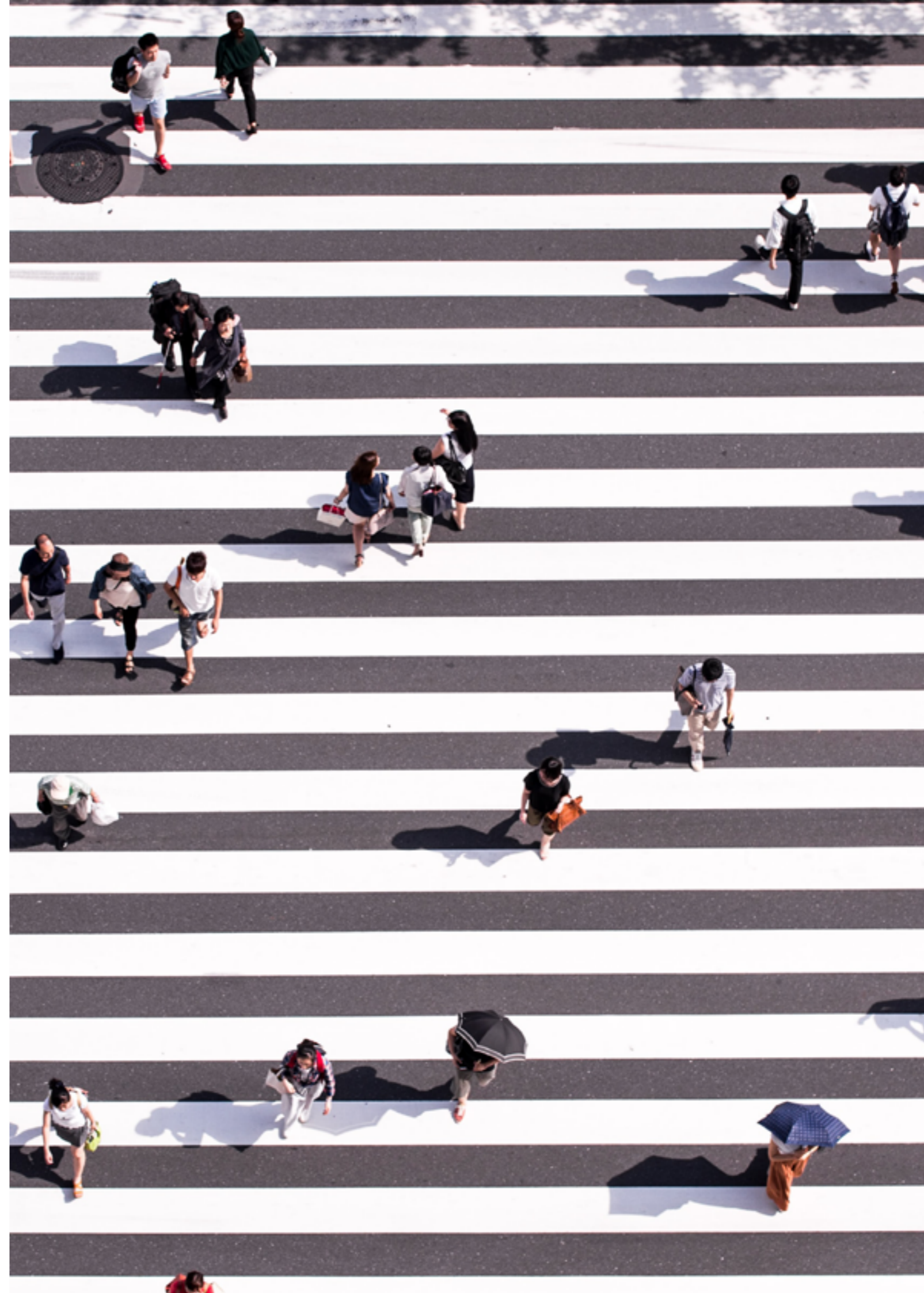
What do young people expect from mobility in the years to come?

Millennials expect a profound change
in mindset in society, institutions and
brands in the coming years regarding
mobility...

... since it transcends areas such as health or caring for the planet, being a cornerstone for the future of this generation and future generations.

“In my opinion, the main change will be in mentality, in the way we see things. We’re beginning to realize that by taking care of our planet, the place we live, we can be healthier and live more happily.”

“The way we move determines our present and future quality of life. We have a moral and social obligation to preserve it by choosing to go on foot or by bicycle whenever we can, lean towards public transport or opt for electric mobility whenever it is within our reach. All switch mindset and go all out.”



Arpo What do young people expect from mobility in the years to come?

AS a SERVICE

A complete offer of solutions that allow the user to efficiently and effectively manage all their travel.

Brands and companies as relevant agents in the coming years, from the creation of services in response to new needs to a more holistic mobility.

Electric & autonomous

No fuel, clean, sustainable, no noise... and more automated: autonomous, assisted, connected, driverless vehicles.

Greater progress and development of the electric sphere as regards infrastructures, autonomy on roads, charging points and lower prices. Possibility of integrating maps for automatic driving.

Technology

Digitally connected, intelligent, managed by platforms and apps that add services (search, information, reservation, payment, access to different modes of transport...).

Alliances between transport, energy and mobility companies and large technology companies, such as Google or Samsung, are visualized to create comprehensive user service platforms.

Accessible & collaborative

Simple, inexpensive solutions and services, available to everyone, that can be easily shared between several users, that are paid only for use and without associated complications.

Consolidation of rental as a reference service in large cities and commitment to shared travel solutions based on economic savings and sustainability.

Organized

A mobility ecosystem, less chaotic and crowded, more structured and harmonious, regulated, controlled, legislated, safer and more efficient.

Projection of less traffic and saturation on the roads, reduction of accidents... mobility is better coordinated at all levels.

“In the future there will be cars, but we’ll use them much less as there’ll be more sharing options. They won’t be essentially private either, they’ll be shared more with other people.”

“Driving without traffic jams will be facilitated and vehicles that pollute will be avoided by investment in electric and self-driving cars.”

“I’d opt for creating cheap and accessible services for everyone, reducing costs with apps and the possibility of picking other people up along the way to share the same journey.”

“I hope that the current panorama changes a lot, that the use of bicycles and scooters is encouraged more and that most of the means (of transport) are electric.”

“The use of environmentally friendly means of transport will be promoted, governments need to help implement them in society.”

“Transport options will unite and concentrate services so that people pay for only those they use.”

“In the future, companies like Google will have agreements with many transport options and will develop very comprehensive apps for new means of mobility. Also the energy companies, such as Naturgy, are going to promote from the side of renewables.”

“The concentration of people in large cities makes it inevitable to rethink the way we travel, which is simply not sustainable. And these needs will be better read by companies such as Cabify, BlaBlaCar...”

“Technology companies are going to start to getting into this area by releasing products that meet new mobility needs and even creating new needs.”

“Little by little we’ll stop owning vehicles and rent everything more.”



Focusing on apps, a progressive trend towards service integration is expected. The ideal app for young people is seen as:

A free app that connects all mobility services (including public transport), allows you to compare them and suggests the most effective ones based on need.

That includes self-driving vehicles.

All functionalities: information, mapping, planning, search, comparison, prices, choice of services and extras, payment, suggestions, loyalty, other users' opinions, promotions and discounts, alerts, incidents, history, preferences, personalization, QR...

That promotes and "rewards" sustainable use: accumulation of points, incentives... when choosing electric / hybrid alternatives.

That makes it possible to change from individual / private use to shared use on the spur of the moment or when user chooses.

Final Reflections



Mobility is transformed into a more dynamic, open and spontaneous scenario that fully connects with the millennial, enhancing its essence and expanding its possibilities.

The future of mobility is visualized with the use of digital management and integrative platforms / apps for services and global mobility solutions.

We are moving towards a concept of mobility as a service in which the user is the protagonist. Mobility incorporates elements such as technology, sustainability or the possibility of sharing vs. possession of bygone days.

Brands are considered a key agent in the evolution of mobility in the coming years. They respond to new needs with adaptive services and solutions; and also have the ability to raise awareness for a global change in mentality.

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54

We
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know