

# KANTAR

## MOBILITY FUTURES 2021:

**The Next Normal:**  
How will COVID-19 change  
the way mobility evolves in  
the world's great cities?



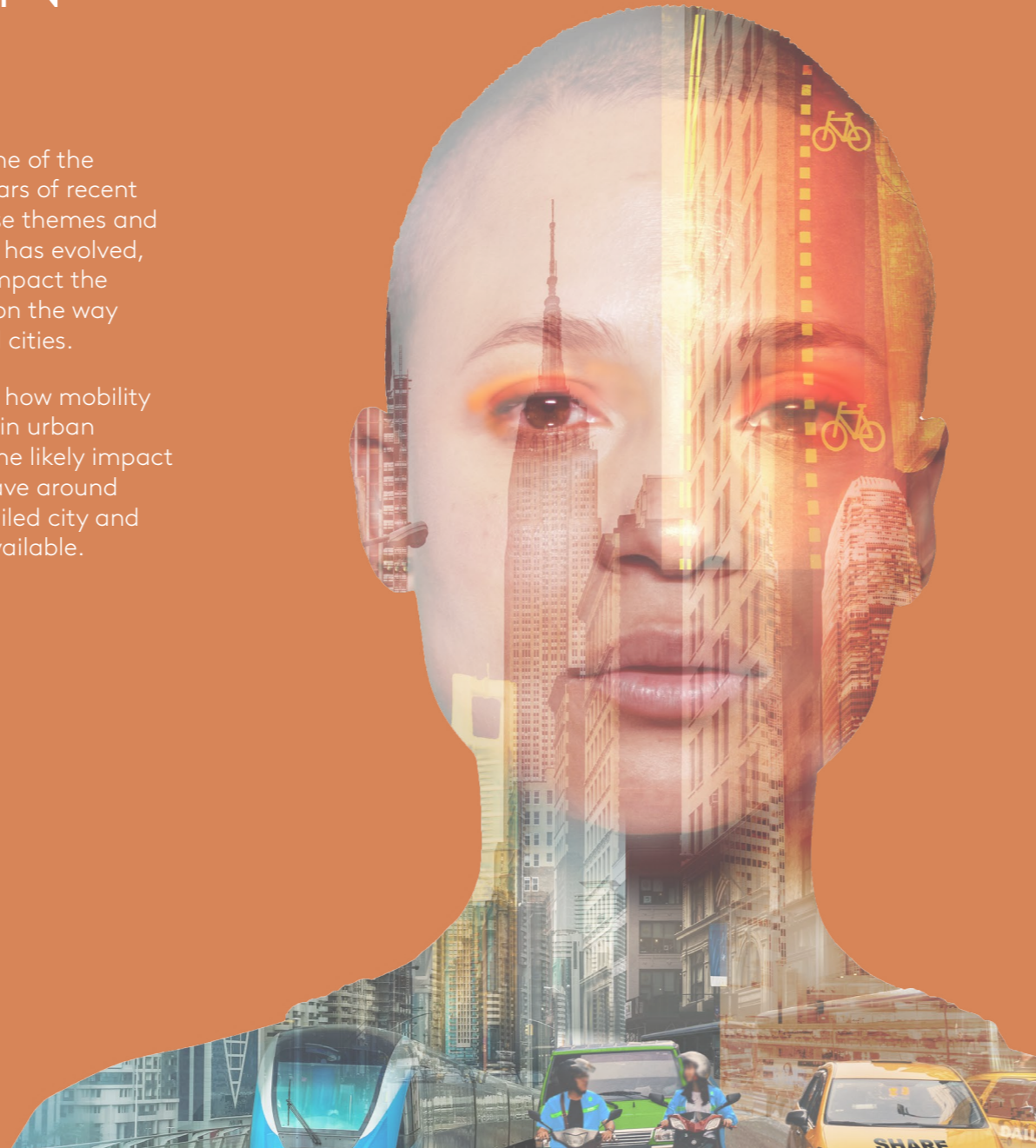
# INTRODUCTION

**Mobility is an important topic for people, legislators, municipalities, mobility providers, car manufacturers, environmentalists and more. It affects our quality of life, major investment and the environment. The world is moving fast, and mobility trends even faster, and of course the COVID-19 pandemic has shaken the world in an unprecedented and unforeseeable way.**

Mobility Futures is a global study that explores people's behaviours and attitudes towards travel and mobility. It looks at how urban mobility is changing in the world's major cities. The first edition in 2019 uncovered important trends affecting the world's major cities.

Now in 2021, after one of the most challenging years of recent times, we revisit those themes and look at how mobility has evolved, and critically what impact the pandemic will have on the way people move around cities.

This booklet looks at how mobility trends have evolved in urban environments, and the likely impact the pandemic will have around the world. More detailed city and global reports are available.

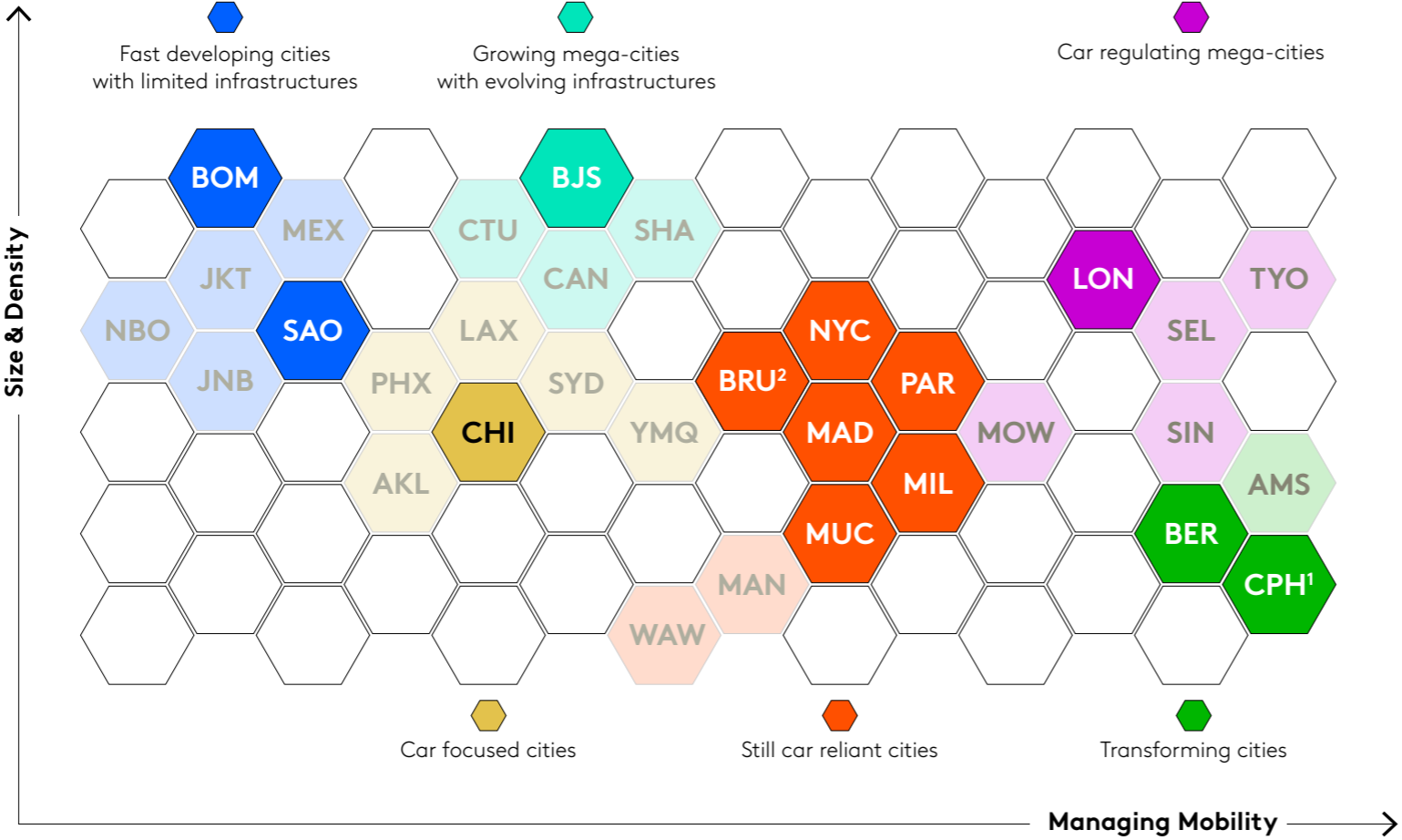


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Mobility Futures 2021 – city coverage

- BER Berlin
- BJS Beijing
- BOM Mumbai
- BRU Brussels
- CHI Chicago
- CPH Copenhagen
- LON London
- MAD Madrid
- MIL Milan
- MUC Munich
- NYC New York
- PAR Paris
- SAO São Paulo



# ABOUT MOBILITY FUTURES

The first edition of [Mobility Futures in 2019](#) interviewed over 20,000 people in 31 cities across the globe and consulted 50 mobility experts to identify mobility challenges, growth opportunities and transport habits. The study helps us understand the key drivers for influencing transport decisions and which emerging trends and technologies provide the best opportunities for mobility growth.

To understand the magnitude of the impact of COVID-19 on urban mobility, we decided together with Mobility Futures subscribers to revisit some of the key themes identified in 2019 and look at new and emerging trends.

In February 2021 we spoke to over 9,500 city dwellers from 13 cities worldwide about their current travel experiences and desired modes of transport (12 of the 31 cities covered in Mobility Futures 2019 plus Brussels). Our investigations focus on the effect the pandemic has had on the way people live and move in their cities.

We continued to test new mobility concepts, as we did in 2019, to assess the potential of future-oriented solutions and analyse the evolution of urban commuters' usage and preferences regarding daily trips and the mode of transports they use.

We will use the Mobility Futures 2021 data to revise our Urban Mobility Forecasts for 2030, to predict future share of volume for different modes of transport.



# THE CHANGING LANDSCAPE

**In 2019 we identified five driving forces that were shaping mobility in urban landscapes: economic, ecological, technological, political and socio-cultural.**

City dwellers were ready to change their mobility habits. We predicted that urban transportation would reach a tipping point by 2030 when the car would no longer be the dominant means of transport. We also revealed the crucial role emotions play for city dwellers when deciding which means of transport to use. And we predicted more leisure-based trips in the future with a drop in commuter levels due to remote working!

Our latest study found that the trends we identified in 2019 are still valid but to a different degree. The pandemic has affected them all, with critical implications for urban planning.

Here's how the pandemic and current city landscape has impacted those issues.



## Economic

COVID-19 has reinforced the inequalities we observed. This may lead to less affluent people looking for more affordable means of transportation.

## Ecological

Most government recovery plans include a strong commitment to more sustainable mobility, in cities as well as nationally. That still resonates with people's expectations, notably the younger generations.

## Technological

The acceleration towards e-commerce, e-entertainment, e-socialisation, e-learning and e-working driven by the pandemic has enhanced people's familiarity with digital technology. A potential accelerator to broader usage of e-mobility apps.

## Political

Many political forces from the municipality level to international ones now have more sustainable and inclusive mobility at the top of their agenda.

## Socio-cultural

Major lifestyle changes evolved over this period, we have become more home-centric, and the dividing lines between work and leisure have become blurred.



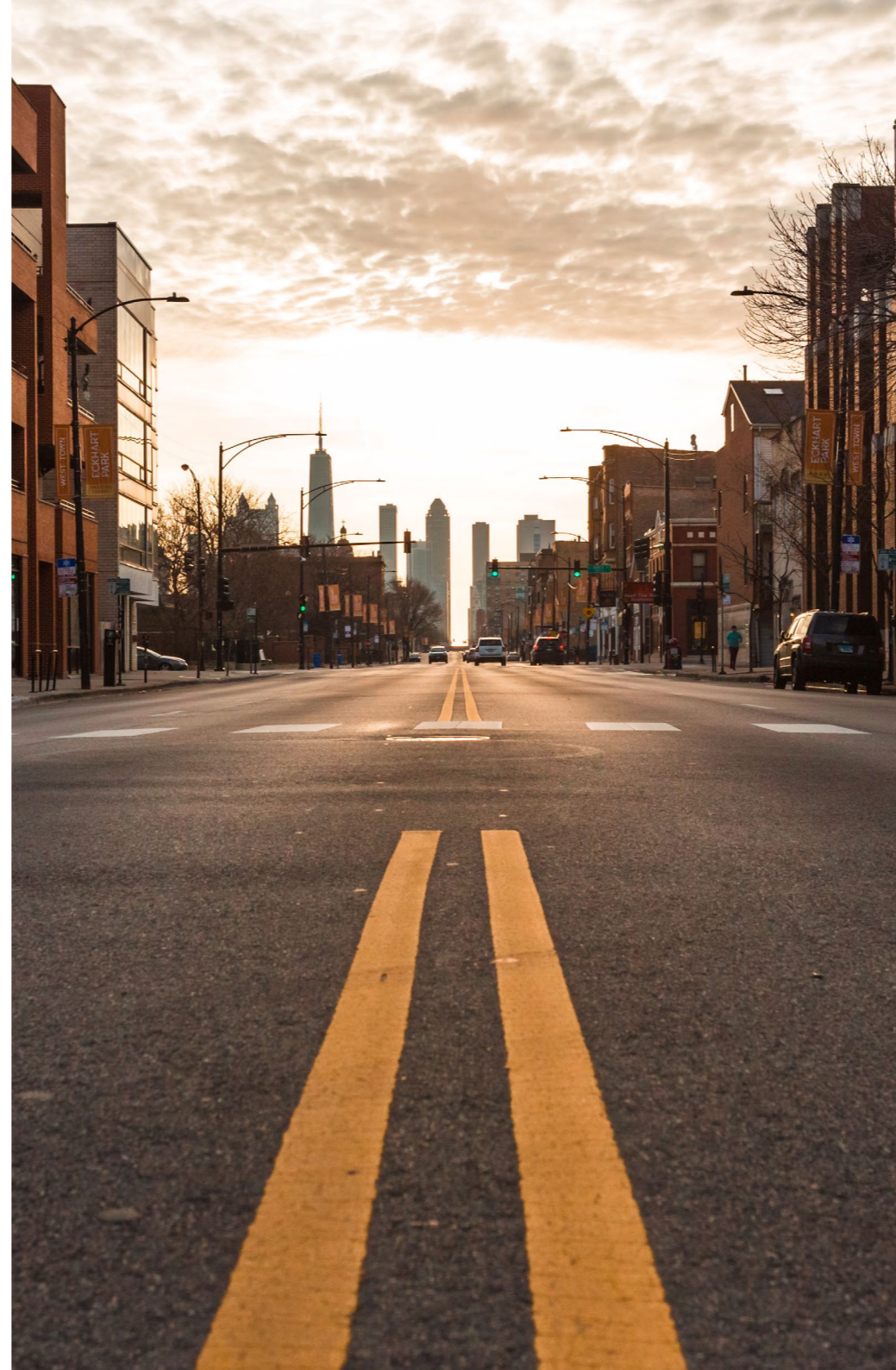


# THE WORLD TODAY

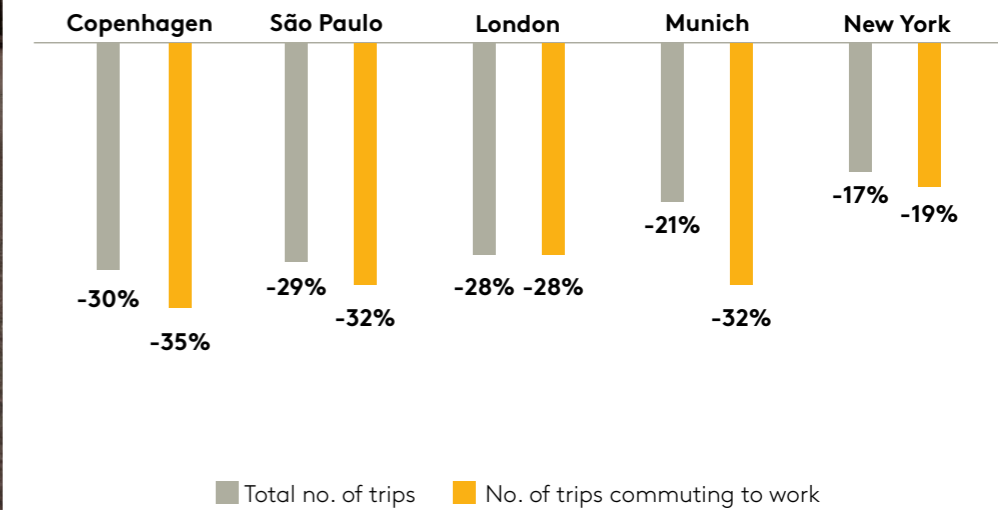
**As COVID-19 struck cities and countries around the world people's lives changed overnight as they became confined to their homes. Daily mobility came to a halt around the globe and travel behaviour changed within days - to a degree never seen before. But what will happen when the pandemic is over? Will people go back to their old habits - or will there be an entirely new normal?**

Mobility Futures 2021 explores the impact of the pandemic on people's behaviour and plans for remote working and travel. It compares current and expected preferences and behaviours to pre-COVID-19 times to uncover emerging patterns and trends and 'The Next Normal'.

The pandemic has led to a significant decline in the number of trips made in major cities. Our data shows a 30% drop in travel volume to work, places of education and leisure activities during the pandemic. People's lives have become centred around their homes. They work at home, shop nearby, walk nearby and travel less, as a consequence, in opposition to the decline in commuting, daily shopping trips stayed about the same (+1% vs 2019).



Change in traffic volume due to pandemic – top 5 cities





# THE THEMES SHAPING 2021 AND BEYOND

In addition to the evolution of the five themes identified in 2019 we found two new forces in COVID-19 times that will fundamentally shape the future of urban mobility.

- 1** REMOTE WORKING IS A GAME CHANGER
- 2** CITIES MUST ACT FAST TO TRANSFORM



1

# REMOTE WORKING IS A GAME-CHANGER



# 1

## REMOTE WORKING IS A GAME-CHANGER

Remote work is booming – 65% of people are currently working from home.

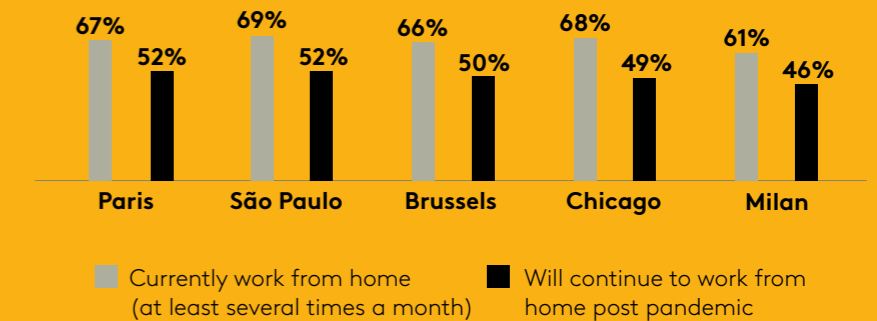
Around 50% plan to continue remote working post-pandemic.

COVID-19 has fundamentally impacted working habits around the globe. The continuation of remote working post pandemic will transform the commuter culture. With more than two-thirds of city dwellers currently working from home there has been a significant shift in travel. Public transport that was used as a primary mode of transport for commuting in city centres has seen a -5.4 point drop in share of transport mode used.

An average of 50% of workers plan to continue working remotely after the pandemic, so the new normal will see a significant change in mobility priorities. The work from home trend differs by city, so municipalities and employers will need to adjust to the local reality and citizens' expectations.



Remote working now and in the future – top 5 cities







2

CITIES MUST ACT  
FAST TO TRANSFORM



# 2

## CITIES MUST ACT FAST TO TRANSFORM

The move to healthy travel has double benefits. Happier commuters and cleaner cities. Cities must act fast to cater for these preferences to drive lasting transformation in urban mobility.

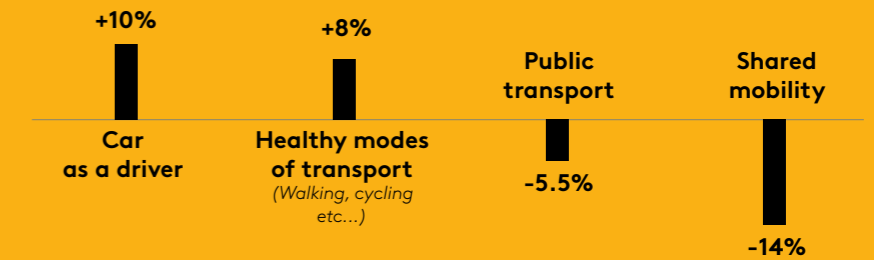
People's needs and preferences are evolving and emerging throughout the different stages of the pandemic. City infrastructure must transform to meet those needs and cities must act fast to meet the pace expected by citizens.

COVID-19 has accelerated preference towards healthier modes of transport. Walking and cycling have seen a noticeable increase in popularity, particularly in Europe (+4.8% YoY). Europeans have favoured walks and bike rides for their daily journeys. Walking is the most preferred mode, and the most satisfying across all cities with satisfaction scores of 78 out of 100. Throughout Europe, pop-up bike lanes demonstrated that it is possible to quickly move the cursor towards healthy travel in cities. E-bikes have also emerged as a highly satisfactory mobility solution in urban areas - with the biggest increase in satisfaction globally - a 8.5% increase from 2019.

In US cities, however, we saw only a slight increase in the use of healthy transport (0.6% YoY), mainly due to longer distances, car-centric infrastructures and lack of cycling infrastructures.



Change in preference for modes of transport Europe



On the contrary, concerns about COVID-19 and social distancing measures also led to an increase in preference for car driving solo and a reduction in use of car sharing and public transport.

COVID-19 has caused behaviour changes never seen before. While these preferences usually evolve slowly over time, this year we have seen strong movements as people and organisations have quickly adapted to the lock downs and social distancing.

Preference for individual methods of transport such as car, bike and walking increased across the globe, while all collective means of transport such as car sharing, public transport declined in preference (as well as in usage).



# THE NEXT NORMAL

People in major cities around the world are still ready for change, but their transport preferences have shifted. The trends observed by Mobility Futures 2021 will have a significant impact on the future of mobility in 2030. Declining traffic volume due to the increased popularity of remote working opens the possibility for city dwellers to follow their personal preferences and use healthy modes for shorter distances. For longer distances the car is regaining people's preference as it is perceived to be safer than shared and collective modes. Public transport on the other hand could face a double blow, with reduced overall traffic volume and declining share of preference linked to the pandemic.

## **These evolutions in mobility also bring opportunities:**

- An accelerated move to greener cities due to a preference for healthier travel
- The chance to bring the voice of commuters to the table and rework transport user experience and improve satisfaction
- The prospect to connect different modes of transports and leverage technology to offer fluid, multi-modal and more sustainable mobility options
- The ability to act on peoples' readiness for change in adjusting city infrastructure for all stakeholders involved in the urban mobility ecosystem.

This booklet highlights some of the overarching mobility trends observed in 2021 and how this has changed since 2019. Detailed city and global reports are also available, providing in-depth analysis and a comparison of trends by city over time and detail on which levers to pull to drive behavioural change. The reports also provide results of the Mobility Concepts tested, and the forecast of Mode of Transport share for 2030.

**To find out more 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](mailto:mobilityfutures@kantar.com).**

## **About Kantar:**

Kantar is the world's leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients **understand people** and **inspire growth**.