Fjord and Volkswagen
Future of Mobility Study
What is this about?

Understanding behavior
If you want to transport people, you have to know what moves them.

To create the products and services people really want — in mobility and beyond — we set out with the Volkswagen Group to learn what motivates people’s transport-related decisions in particular environments.

Other mobility studies often focus on technology, or concepts for mobility, like autonomous vehicles.

This is limiting because it narrows your view into what’s possible, and makes you disregard what people truly need and want.

The chief difference between this study and others is a keen focus on understanding people and their context so that we can build a complete picture.

We dug right into what makes different people tick, what drives their choices, and what connects their influences with those of other people in other places.

What did we learn?

Long live the archetype
Movement happens in places. Global archetypes of space enable scaled mobility services more effectively than marketing segments.

Expectations travel the last mile
Do you think you need to be great in your service? People expect you to move them to destinations — not to the end of your operating zone.

Intermodal minds set mobility
People’s circumstances (and their behaviors) are constantly shifting. Focus on fitting to mindset, not mode of transportation.

Going for gain, leaving behind pain
Mobility companies have focused almost singularly on solving one problem: how to get people from point A to point B. But the science of moving people is about so much more than access to transportation.

Partner-play defeats platform-play
We found many mobility needs unaddressed in the market — and it shows. Access to partner networks, rather than vehicles, will form the successful mobility platform of tomorrow.
“When the going gets tough, the tough reinvent.”

– Rupaul, 2014
Our research is articulated in three views, a concept that reaches well beyond the auto industry. Whether an energy provider, a city, government, airline or transportation-related business, for a company to understand fully how it should evolve itself for the future, it must take as keen an interest in learning about people as it does in analyzing the market.

The real magic lies in marrying the two sets of insights to create a merged view.
Our goal was to obtain a market view not limited by national borders or country clusters.

We used quantitative research methods to obtain a market view unconfined by national borders or country clusters. It no longer makes sense to offer the entirety of any large country a single solution to meet their diverse needs.

We worked within a framework that allows for more granular, intelligent clustering of target regions, and considers the many diverse characteristics that make up a mobility environment.

Our market research spanned the globe, and drew meaningful similarities between regions that share common features.
Our goal with the human view was to investigate what people want, expect and need when they’re commuting and traveling in their daily lives.

We put people at the centre of our research to learn directly from them, and truly understand what they think about when they make mobility-related decisions.

We talked to people in five carefully selected places, choosing each place for its unique characteristics, which would give us as many insights as possible.

We looked into the habits they develop, what makes them happy, what frustrates them, and what would make them change their routines.
Bringing the market and human view together.

We collided emotions with numbers to see whether they would work together to create the magic we sought. They do.

The two together give us meaningful, tangible insights, allowing us to see clearly what behaviors are most common in certain places – and how people's environments affect their choices.
I need to plan ahead.
I like to be in control
I need systems and structure to stay on track
I want to use my time wisely

Key beliefs
I like to be in control
I need systems and structure to stay on track
I want to use my time wisely

Key behaviors
I check the calendar in advance to be prepared for everything
I habitually take the same route on regular journeys
I change plans if my preferred transportation is inaccessible

Planners are naturally driven to plan and be in control. They don’t respond well to uncertainty; it can have a negative impact on how they feel and act.

For some, this is just a part of who they are. For others, circumstances make it necessary to become planners; for instance, if their local public transport is poor or if they have specific accessibility needs.
Challenge accepted

Some people need to plan their journeys carefully due to a physical challenge.

People with physical challenges have specialized mobility needs that demand extensive planning. This might mean pregnant women, parents with small children, elderly people, people who use wheelchairs or walking aids, people who are very tall and/or overweight, deaf or blind people, as well as people who need to transport large items. Each group has their own particular set of requirements.

Modes of transport themselves can cause people issues, although even access can be very difficult. Even if step-free access points are marked on maps, they’re often unavailable, changing a person’s whole plan, possibly even forcing them to use expensive specialist taxi services (which are difficult to book at short notice). People with disabilities often need to rely on the kindness of strangers, especially on public transport. This could mean waiting for someone to bring a ramp so they can get on or off a train, or waiting on the sidewalk for a bus driver to help them. These experiences can make people uncomfortable both physically and psychologically, as they can’t avoid being the center of attention and causing delays for other passengers.

Short-term physical challenges like reparable injuries, tiredness or pregnancy can require extra levels of planning, like researching alternatives to habitual choices; options that are accessible, step-free and comfortable. People traveling with young children must check the availability of child seats and/or storage space for a stroller. Even dog owners must know which transport options will accept their beloved pet, which can vary between taxi drivers in the same city. Getting hold of a vehicle to transport large items can be difficult and often very expensive, given that in many locations on-demand vehicles are limited or unavailable.

Put simply, these people need to spend more time planning their mobility. Sometimes this makes them completely inflexible and unable to attend spontaneous social activities.

“I don’t have a driver’s license. My wife took me to work before she got pregnant, but now I use public transportation, so every day I have to check the bus and weather before I leave.”

Steven, 36 – UK
Road ahead closed

In some cases, people’s transport choices are shaped by the need to anticipate and plan around infrastructural challenges in their area.

Transport infrastructures (and, in fact, the environment in general) are always subject to change for various reasons, including railway signal failures, unavailability of mobility options, road repairs, industrial action and extreme weather conditions. Some modes of transport are notoriously unreliable in certain places.

People living with these types of infrastructure challenges find that they have to plan their routes precisely, regardless of whether the desire comes naturally to them.

Common challenges include traffic congestion, weather conditions or the unavailability, infrequency or unpredictability of public transportation. In certain cases, people strongly believe that their government should be improving the transport infrastructure where they live.

Some people plan their schedule around rush hour and to avoid infrastructural challenges. These include poor public transportation options or insufficient running times: in some areas, certain modes stop running very early and no alternatives are given. Consequently, people complain about missing out on social events and in exceptional examples people have to find a place to stay close to work as they have no way to get home after they finish. In situations where individual transportation is available, it’s often prohibitively expensive.

Limited or costly parking make it difficult or impossible for people to use their own car, so people often use park-and-ride systems and public transport the closer they get to urban areas.

Transition times between modes of transport are often so tightly scheduled that people have to run to the next connection, often not waiting for green lights to cross streets safely. Additionally, transition times are often not synchronized, and missed connections or delays mean losing valuable time. Zones for sharing and hailing services are often too limited, sometimes due to dangerous/high crime zones. These limitations force people to be organized and it even motivates some to relocate to a well-connected place to avoid such issues.

“I have to leave the office at 18:00 to be home at 19:00. If I leave at 18:15, it takes an hour-and-a-half. But if I leave at 18:30, it takes me almost two hours to get home. I cannot spend time with my colleagues after work.”

Veronica, 35 – US
Planning is king

Some people’s travel choices are shaped by their desire to stick to strict routines and extremely detailed planning of routes and modes of transport.

A strong impulse to be in control at all times during a journey means that people can struggle to be flexible and spontaneous when things around them change. It feels like a loss of control even if they’re still on track to arrive on time. Sometimes people who work this way are perceived as “control freaks” by others.

People who instinctively plan make it a habit to check their public transport routes for the next day before they go to sleep to ensure that they’re prepared. Some people can even recite their commute routines to the minute. They plan each start, stop and transfer to precision, and know exactly what effect any delays will have on the rest of their journey. They use community-based traffic apps to obtain real-time information during their journey.

If their train suddenly stops at an unknown station or if their plan is affected by missed connections or delays, it breaks the planner’s routine and can easily result in stress. It requires additional planning and hence additional time that they hadn’t allocated. This could affect their whole day, which had been carefully planned.

The motivation to fall into this pattern can strongly vary. Besides the control factor, people also plan their routines to take advantage of the most cost-efficient option. Booking tickets a long time in advance and buying annual or monthly season tickets can reduce costs dramatically, especially in comparison with on-demand options like car-hailing.

A downside of this way of traveling is that people’s inflexibility can lead to social isolation. When colleagues or friends spontaneously decide to meet after work for drinks, people who are rigid about sticking to their plan often don’t want to change their plans and thus they might choose not to join in.

“I must trust the [public transportation] company that they are reliable. We have made a deal that I will arrive on time.”

Magnus, 65 – Sweden
I need to be comfortable.
Comfort-seekers love to enjoy the present and they put their immediate happiness above other priorities. Their desire to be comfortable leads them to either allow extra time so they can use their favorite mode of transport or use several different services so they have a comfortable option available whenever they want it.

Key beliefs
I’m spontaneous
I’m happy to pay more for the lifestyle I choose
If something works at home, it should work anywhere
I don’t want to care about how to get there
I want to be entertained

Key behaviors
I’m willing to use costlier on-demand options than cheaper public transport
I never really like to plan in advance
I happily use convenient delivery services like Amazon Prime Now
I watch movies or play games so that I don’t get bored
Bring it

Some people use delivery services as a great alternative to running errands themselves.

Not everybody associates delivery services with mobility, but ultimately they affect people’s mobility behavior, so in this study delivery services are treated as a mobility service.

For many people, the convenience of delivery is much more preferable to traveling to do things themselves. In many places, food and grocery delivery services are either established or on the rise. The availability of these kinds of services offers a source of comfort for those who find it difficult to move around, and by giving people more time for the activities, they value them more strongly.

Whether due to a lack of transport options or simply convenience, many people prefer to use delivery services instead of spending time and effort on grocery shopping, even if it means spending more money. Heavy or cumbersome goods are most often ordered online to reduce physical effort. In more remote places, people can’t always get what they need or want in local stores, so delivery options are much more preferable to long drives elsewhere. Even car owners prefer to use delivery services if it will save them time and effort.

Some people would like to make use of delivery services but might be reluctant because they can’t easily track their delivery, or because they don’t trust the service providers to get their goods to them on time and in good condition. Some can’t access innovative delivery services as they’re currently only available in large metropolitan areas, although services like Amazon Prime Now are now more widely available. There’s also a question of environmental concerns, as many people resist delivery services as much as they can because they dislike the ways in which goods are packaged or disapprove of labor practices and price dumping.

Some people prefer to see and touch items before they choose to buy them, which renders delivery services less useful. Others prefer a traditional, human approach, choosing to ask other people do their shopping for them: certain supermarkets offer this as an additional service.

“I get everything delivered as I don’t wanna drive to the store, which is 20 miles away.”

John, 49 – UK
In the bubble

Some people try their best to keep their lives contained to a small area close to their home. They like to stay inside their comfort zone.

Having everything they need just around the corner from home is a source of comfort to many people. However, it limits their awareness of places outside of their comfort zone.

Within this theme, once people have found a good local coffee shop, bar, restaurant, etc., they will keep going back and stop exploring further afield. They set their bubble close to their workplace to avoid traffic and make life more comfortable, through saving time and minimizing effort. In their bubble, journeys are very short and don’t require long commutes or transitions. Life in the bubble is easy, so they rarely venture beyond it.

People who fit this theme avoid leaving their bubble, often without realizing. They’re determined to cover all their life essentials within their local area. If that’s not possible, they’ll either search for a delivery service or reluctantly leave their bubble, which can make them feel disoriented and overwhelmed.

In cities with a high crime rate, it’s more likely that people can end up in sketchy neighborhoods if they leave their bubble. If their situation really worries them, people use on-demand services or call relatives to collect them quickly. Their desire for familiar solutions and services that they already know is very high. When people leave their comfort zone, they need to be able to use their smartphones to navigate and access on-demand services, but in neighborhoods with higher crime rates they might be reluctant to make their smartphone visible for fear of becoming a target. Such experiences reinforce their need to live within their bubble.

In some areas, people live in contained neighborhoods within the city or in isolated villages outside the city, and they hardly ever leave because that would demand planning and effort, which reduces their level of comfort. If these people want to meet friends beyond their bubble, they often find it difficult to get back home at night. They have to either stay overnight, choose not to drink alcohol so they can drive home or use expensive private transport services.

Our research showed that the wealthier people are, the more likely that they live in an urban bubble. This is because wealthy people can choose their neighborhood more freely, so they choose places that are well connected and boast all of the services and facilities they want. In many places, such bubbles are almost like secure islands, isolated from nearby insecure neighborhoods.

“I have chosen a life where I have got everything around me. All of my journeys are short. Supermarket, etc. Even when my daughter is staying with her mother, it is only a mile away.”

Anthony, 53 – UK
Using dead time

A behavioral pattern where people perceive commuting and traveling as a waste of time, but try to make the best out of it.

Some people find time spent traveling restrictive and frustrating, and they choose to pass the time by entertaining themselves on their smartphones, listening to music, reading or simply watching the world go by through the window.

In other words, people engage in various activities and actions to make the time that they "lose" while traveling as enjoyable or useful as possible.

For some people, time in transit feels like dead or wasted time, so they develop different coping mechanisms. While conducting the research, we observed zombie-like behavior in these people: once they're in the vehicle, they zone out and create a personal space by taking their focus away from the physical environment. They disconnect from their surroundings by diving into the digital world on their gadgets, and they engage only with their headphones and their screens. People listen to music or podcasts or talk to friends on the phone to make lonely car rides less boring. They find it impossible to zone out if unpleasant fellow passengers, a physically-uncomfortable atmosphere or circumstances when they can't use their devices; for instance, in environments with high crime rates, where people avoid using their devices for fear of robbery.

Transforming “dead” time into useful time is the goal, which people choose to do by being productive, doing something enjoyable or meaningful. They really want a device-friendly journey without interruptions, with connectivity, a power outlet, and a small table. They might even pay for a first-class ticket if it guarantees these things.

Any circumstances that prolong the journey make the situation even worse for people with this behavior; for instance, when they encounter unexpected delays.

"The bus is a means to an end. I either look out the window or I sleep."

Birgit, 52 – Tenerife
Peace of mind

This refers to people who wish to use as little cognitive resource as possible. Low-admin travel is their definition of comfort.

For some people, comfort means not having to think too hard about planning their travel: they simply want to identify the easiest way to get around. Journey time and costs definitely come second to their wish for an easy life.

People who fit this pattern prefer easy options that don’t demand too much brain power, and that don’t place too much responsibility on them. They’re happy to spend money for an easier experience. “Mental comfort” can be a subjective thing: it might mean taking a longer route to avoid transitions, being able to use contactless payment cards rather than having to buy a ticket or avoiding the risk of encountering unpleasant fellow passengers. For others, it’s much more complicated.

Travelers with special requirements might experience mental discomfort if a mode of transport can’t accommodate them comfortably, if they feel like they’re bothering people or if they find themselves at the center of attention. This could include people with physical disabilities who need help to access vehicles, people traveling with children (who might be crying or causing a disturbance) or people who require two seats on an airplane. When people are outside of their familiar environment, they feel even more strongly about not having to think too hard. When they’re not familiar with local transport options, they will always choose the easiest one, even if it’s more expensive.

Some within this theme prefer to take on-demand services that take them door-to-door without them having to drive themselves or find parking. It’s comfortable, seamless and doesn’t need much planning, which liberates them to think about other things. For others, they find mental comfort in driving their own cars. There are also those who opt to avoid the roads altogether because traffic congestion causes them anxiety.

Renting cars can prove to be too cognitively taxing for some people, as they hate the idea of reading through complex terms and conditions that could lead to hidden fees. It feels like too much responsibility, which has a huge impact on their perception of comfort.

Some people become anxious about the prospect of missing their stop or connection, so they avoid tasks that demand their full attention while they travel, like fascinating books or compelling smartphone games. Remaining alert to their surroundings gives them mental comfort.

“Whatever requires less cognitive power, that’s the route I prefer.”

Trevor, 35 – US
Now or never

The ability to be spontaneous is an important driver for some people’s everyday travel choices.

Some people want reliable access to multiple transportation options any time and anywhere, so they have freedom of choice and can be spontaneous.

They love their personal freedom and like to avoid making plans in advance or living by rigid routines.

People can enjoy this impromptu lifestyle by owning a car or a bike, or by using on-demand mobility services like car-sharing, ride-sharing and car-hailing. Some people use transportation very spontaneously, choosing not to plan around the specific constraints of the city they’re in but rather taking ad-hoc options whenever they need to get somewhere. When their need for spontaneity is affected by delays like congestion, they become frustrated that their progress and flexibility is out of their hands.

This lifestyle doesn’t come cheap: privately-owned, on-demand or individual transport options are usually expensive in comparison with public transport, using privately-owned cars is often strongly disincentivized by taxes and tolls, and in rural areas hailing services are necessarily more expensive due to the distances involved. Some people actively choose costlier package solutions for their vacations so that they can maintain their spontaneity with the inclusive mobility options.

People who live impulsively often have liquid expectations of transport options. Whichever city they’re in, they expect access to the same convenient services they have at home – like Uber or DriveNow – and they become frustrated if the same service operates differently in different locations. If a certain service isn’t available, people struggle to research alternatives and in many cases they can’t access those alternatives without a resident’s phone number or ID number. In a similar vein, once people have experienced an easy, barrier-free service in one location, they expect the same everywhere and across services. For instance, one interviewee expected his car rental experience with Sixt to be as straightforward and quick as it was to hop into an on-demand street car. He was frustrated by the extensive paperwork and time investment he had to make to rent one of their cars, which indicated a much greater commitment.

On-demand services are more common in urban areas, and they are usually accessed via internet-enabled smartphones and an active user account. People can become frustrated if they can’t access such services because they have no cellular data, or because they can’t set up an account from their foreign home address. People are mindful of the environmental impact of on-demand options, albeit often not to the extent that they stop using them.

One of the few situations that will make a spontaneous traveler plan more carefully is when they have a change in circumstances, like traveling with a dog or a child, or when they’re transporting large items. Often they’ll need to compromise and take routes they’d usually reject, and private on-demand services don’t accommodate all needs that fall into this category.

“When I want to go somewhere, I shouldn’t need to plan: transport should just be there. That for me is the comfort.”

Rudy, 28 – US
Physical comfort

An individual’s own definition of physical comfort can strongly influence their travel decisions.

To different people, “physical comfort” means different things. It might drive people to choose options that offer benefits like cleanliness, privacy, plenty of leg room, comfortable seats or the ability to travel even in extreme weather conditions.

For some, this is about the expectation of a certain degree of luxury, although the definition of luxury is highly subjective and can lead to very different choices.

When it comes to physical comfort, people’s expectations vary dramatically, especially on public transport. Some are easily pleased and consider a journey comfortable if it’s not overly crowded and seats are available. Other expectations can include anything from cleanliness, air quality, temperature, privacy to personal space. People tend to be willing to spend time and money to get the level of physical comfort that they expect, taking costly private options when public transport disappoints them, even if that means a longer journey time. People who really want physical comfort will prioritize it over their environmental concerns about using private transportation. It bothers them, albeit not enough to prompt them to change their behavior.

For some people, having immediate access to a vehicle that isn’t constrained by timetables or weather conditions is key. For others, it’s all about a heated or air-conditioned car with comfortable leather seats. Whatever physical comfort means to them, these people notice when something exceeds their expectations. Conversely, complex transitions, longer walking distances or waiting times will negatively affect how they feel about a certain service.

People with special physical needs such as a disability, transporting large goods or traveling with children or pets appreciate the comfort and convenience of using their own cars, as it enables them to travel easily and offers them a relaxed physical space.

“My car the is most comfortable. I always want the privacy to listen to the news and music.”

Anthony, 53 – UK
I need to spend my money wisely.
I don’t want to spend my money on transport (public transport should be free)
I think it’s wise to find ways to save money whenever you can

Key behaviors
I’m always looking for the cheapest option
I split commuting costs with co-workers or friends
I’m willing to exploit loopholes and gray areas to cut costs
I like to find creative solutions to optimize spending

The cost-aware among us strive to choose the cheapest travel options available. They often feel frustrated by the expense of getting around. Their frugal attitude can be driven by limited income or a wish to set money aside for other priorities.
Hack the system

Necessity is the mother of invention. When mobility is restricted or perceived as too expensive, some people will find workarounds.

To save money and for the joy of having outsmarted the system, people find and exploit legal gray areas and loopholes. Whenever their “hacks” are discovered and blocked, these people are motivated to find other weaknesses that they can use.

Entire families share one monthly public transport student ticket as it is for free (in São Paulo, authorities responded by equipping buses or metros with facial recognition ticket control).

Drivers from hailing services use third-party apps to increase efficiency and reduce potential losses. Uber drivers exchange the newest tips and tricks to exploit Uber in online forums. One popular application sends fake GPS signals, which moves Uber drivers up in the queue at airports to avoid waiting time.

Uber doesn’t operate in dangerous neighborhoods. However, Ubra does, as a bootleg version of the popular service that serves neighborhoods where the original doesn’t dare to operate.

Some metropolitan areas disincentivize car ownership by enforcing quotas, increasing tolls and fees or prohibiting people from using their car on certain days of the week. Some people find workarounds by buying a motorcycle or a second car they can alternate with: a luxury few can afford. People who know and trust each other and have the same destination or route gather together to share a ride, save money or help each other on rotation days.

“With this app, I can skip the Uber waiting line. But I can’t tell you the name, because it’s not really allowed.”

Uber Driver, 59 – Brazil
Money, money, money

Cost is a powerful driver (sometimes even the single determining factor) for many people’s mobility behavior.

Some people are forced into being very cost-efficient because they simply have little or no money to spend. Price is the single determining factor for their mode of transport.

Other people are budget-conscious because they perceive certain mobility modes as not being worth the money. They’d rather take a cheaper, slower option and spend their money on more important things.

For those whose budgets are very tight, it’s often impossible to afford a car or other private or on-demand transportation solutions. In most cases, this makes them highly dependent on cheap public transportation and forces some to walk or cycle. They simply have to choose these cost-effective options, even if it means much longer travel times or exposure to potentially-dangerous situations. In extreme cases, people would walk for long distances (we heard two hours) to avoid paying for a bus ticket.

People who choose cheaper options through want rather than necessity are generally more flexible about switching to costlier modes in emergencies or if they fancy a late night out. Even if they can afford a rental car, they might be hesitant due to hidden costs and intransparent terms and conditions, which could lead to unexpected fees or insurance costs. If they own a car, they might choose public transport to avoid parking costs and tolls. They’re happy to spend time comparing options to find the cheapest solution.

Whatever their motivation for watching their budget, the costs of owning and running a car (insurance, tax, gas, parking, tolls) will often be the main reason why people decide not to own a car. Further complicating things, if people also want to be environmentally friendly, they will be looking at more expensive hybrid or electric cars.

While on vacation, people might have saved enough to be able to spend slightly more liberally, although they’ll do it selectively, often choosing to spend less on mobility and more on food and entertainment.

People who know, like and trust each other and have the same destination or route gather together to share a ride and save money.

“There share a ride with a colleague; we take the same route to work. For me, it’s easy because I don’t have to spend any money on car taxes and so on.”

Diego, 59 – Brazil
I want to avoid risks.
Some people make decisions based on minimizing the chance of something happening. It may simply be that they’d like to avoid the chance of having an uncomfortable encounter with a stranger, it can be significant risks like dangerous road conditions or high crime rates, and it could be anything in between.

I feel comfortable when things around me are predictable and familiar
I stay alert to my surrounding environment
It’s possible to avoid some of life’s dangers

Key beliefs

Key behaviors
I use headphones because I’d rather not chat with strangers on public transport
I avoid traveling through certain neighbourhoods
I choose private options over public transport, either all of the time or at certain times
I don’t let my children travel alone, even the older ones
I always use seatbelts on buses and coaches
Risky roads

The risk of being harmed in road accidents influences people’s mobility behavior.

Risk-averse behavior can be caused by bad road conditions and infrastructure and/or reckless and inconsiderate fellow road users. Depending on the traffic situation and the public’s compliance with traffic laws, people display a strong concern for road safety. In some cases, people heavily base their choice of mode on road safety.

Extreme weather conditions can worsen road safety conditions, making surfaces slippery and reducing visibility: in some areas, snow and ice make it impossible to drive or cycle. Once frozen weather has thawed, often the roads become susceptible to huge potholes, which poses a very real danger for cyclists and motorcyclists. People hold governments responsible for making repairs and altering road infrastructure to support and protect more vulnerable road users like cyclists and pedestrians. They also believe that the government should step up their efforts with enforcing traffic laws so that road users cannot get away with driving recklessly.

Densely-packed traffic can be very dangerous to cyclists, as drivers of larger vehicles can often make impulsive decisions to move without seeing a cyclist approaching or weaving through stationary traffic. Some people are so concerned about the potential for disaster that they’d never consider certain modes of travel, like cycling, walking or using a scooter.

There’s also something of a “blame game”, where different road users accuse others of behaving recklessly and dangerously.

“Amon, 37 – Bristol

“Using the bike lane doesn’t mean that you’re safe. The little plastic sticker on the floor separating me from the cars is not going to give me any security.”
The risk of becoming a victim of crime profoundly affects some people’s travel choices.

The risk of crime has an enormous impact on society and makes people alter their mobility behavior, even to an extent that they might avoid certain modes altogether. Some people make changes when the danger is only perceived and not actual, fueled by media and sensationalism. The potential threats are human-based, such as robbery, theft, rape, violence or kidnapping.

The more dangerous an area is, the more that people seek individual, secure transport options. They’re obviously more expensive and – in extreme cases – only affordable for people who are financially comfortable: the wealthier that people are, the more options they have available to help them to avoid dangerous situations. In some regions, owning a bulletproof car with tinted windows is common place.

Many people are constantly aware of how criminals think and operate. They tend to keep their valuables out of sight in public spaces, so that criminals cannot see what they own and identify them as people worth robbing. This renders them unable to use their electronic devices, and without access to mobility and entertainment apps they might experience stress or boredom, whereby they might even have to memorize entire routes so that they can navigate without a map app.

Businesses and people prefer cashless payment options to reduce the risk of theft and robbery. If people don’t have a bank account, they can acquire prepaid cards to pay Uber or Taxi so that they can avoid flashing cash in public.

Some people are shocked by the idea of ride-sharing because they’d feel unsafe having a stranger drive them.

In some places, people are so concerned about traveling to unknown areas that they’ll often try to avoid doing so completely.

“The idea was to have two bulletproof cars. But since sometimes we travel out of the city we decided to have one that isn’t bulletproof, because if you have a crash, it will take a long time to get you out of the car.”

Joanna, 34 – Brazil
Weirdos everywhere

Some people’s transport choices are influenced by distrusting or being irritated by fellow passengers.

Some people are very cautious of and even actively mistrust strangers. They’re easily irritated when others invade their personal space. Many people feel exposed and want to avoid uncomfortable encounters with “weirdos”.

The fear is having to deal with people that are drunk, smelly, too talkative and disrespectful of other people’s personal space.

Awkward conversations with strangers who might have different mindsets, ideas or political viewpoints are also part of this theme. These are especially bad in situations where people have no way to escape, like a shared car ride with BlaBlaCar. For some people, this is sufficient reason to avoid these types of mobility options completely, even if they’re otherwise convenient and more affordable.

Some people deliberately shield themselves from others. Their coping strategies might include pretending to sleep, leaving a bag on the seat next to them, reading or listening to music with headphones.

While on vacation, the threshold for people’s comfort levels towards being with strangers seems to be more lenient. For people who would never take a bus in their home country, a bus ride on holidays with strangers can even turn into a source of entertainment as they’re in a more cheerful, sociable mood.

“At night, I prefer not to talk when I use public transportation.”

Naomi, 43 – US
I do it because I enjoy it.
People in this mindset tend to travel just because it brings them joy. This group of people try to infuse their everyday travel plans with joy and meaning.

They love their mode of transportation, so much so that they might give their car a name or take their grandchildren on public transport simply for fun.

**Key beliefs**
- I love my car more than people might think reasonable
- I enjoy interacting with people
- A stranger is just a friend I haven’t met yet
- “Me time” helps me to relax and focus on whatever lies ahead of me

**Key behaviors**
- I like to ride public transport or go for a drive just because it’s fun
- I love to talk to people on public transport
- I often go for walks, hikes, bike rides: it’s about freedom, not just getting from A to B
- I “zone out” on public transport to prepare mentally for work or to wind down always use seatbelts on buses and coaches
Enjoy the journey

For many people, mobility is not only about getting from A to B but rather an enjoyable experience in itself.

Some people simply enjoy exploring their surroundings or going on trips where the transportation mode itself is the adventure, or at least a significant source of enjoyment. They will choose a route or mode of transport based on what they consider to be most fun.

Many people love to go for walks, cycle or take the bus with their children and enjoy the opportunity to spend time together. Some are inspired to take routes that will offer them an attractive view, stunning scenery or a chance to enjoy the weather. If they have multiple options for their commute to work, people within this theme tend to take the option that they consider more enjoyable. Taking the same route everyday is boring for some people, so they derive joy in mixing it up from day to day. People will often choose a ride on a ferry for the scenic experience, even if the journey is much longer than other options.

Several people combine the need to get somewhere with a journey that they know they’ll find fun, like walking, running or cycling. Some people get off public transport a couple of stops earlier to enjoy walking the last mile.

The degree to which people enjoy their journey is strongly influenced by physical and mental hygiene factors such as crowdedness, weather and traffic. The threshold at which people stop enjoying a journey strongly varies from person to person.

While on vacation, people tend to enjoy their journeys a lot more than they do in their familiar environments at home. For some who might not choose to take a bus at home, riding a public bus in a new place is an appealing way to observe the local scenery and life.

“I take quite a nice route to work because the city center is super busy: it takes approximately 12 min. I use Google maps to pick which route is the best: it says how long each route will take. Then the one I pick is 6 min longer but nicer.”

Peter, 28 – UK
Me Time

Some people appreciate certain modes of transport because they can enjoy uninterrupted “me time” while they travel.

Some people find comfort in mobility situations where they can use their time solely for themselves. They see commuting alone as an opportunity rather than a chore, where they can be alone with their thoughts and transition from home to work mode in peace.

People use their “me time” for activities like texting, gaming, reading and listening to podcasts or music.

Walking seems to be a particularly popular way to guarantee “me time”. When on public transport, people wear headphones and/or keep their eyes on a screen or book to communicate their desire to be left alone.

A device-friendly environment is often an essential for people who want to have a moment for themselves. It’d be a bonus to have a network connection in the subway to chat with family or friends, or a table to comfortably finish that presentation on the train, but many simply want the time and space to mentally prepare for the day. Physical and mental comfort are closely related. Overcrowded public transport makes it difficult for people to open and read their book or simply to keep their mind clear.

“I commute every day for about an hour. I love this time because my family lives in Spain and it’s perfect to catch up with my family as my mornings are their evenings.”

Veronica, 35 – US
My ride, my pride

Some people display a highly-emotional behavior and attitude when it comes to certain vehicles, especially their own.

Car owners can have a profound connection with their vehicles, and they just love to drive or ride. They often try to avoid using other modes, even if it were the rational choice.

Many people consider their vehicle as a status symbol, and they appreciate the independence and freedom that it offers. Some even give loving names to their personal vehicles. Such emotional bonds are not exclusive to cars: the same affection can apply to vehicles like motorbikes, scooters and bicycles.

Car-lovers love their cars despite high costs, traffic, governmental disincentives, insufficient infrastructure to support cars or many other disturbing factors that would make other people choose alternative options. The car is still a status symbol for many: even more so in places where privately-owned cars are not affordable for everyone.

Bicycle-lovers face the challenge of wet/windy/snowy weather or unsafe traffic, but it rarely puts them off. For some, the bicycle reflects their character and is a sign of health and environmentally-conscious values.

“\textit{I love my car. I live three blocks from here. I could and I should walk but I am addicted to my car.}”

Janene, 65 – Brazil
Social butterfly

A behavioral pattern in which people love to take public transport modes simply to meet and talk to new acquaintances.

Some people actively seek out conversations or like to listen to strangers during transit. They actually enjoy traveling on public transportation because it gives them an opportunity to engage with new people.

There are people who go on trips simply because they enjoy being sociable and interacting with strangers. Some people start conversations for the fun of it, while for others they do it to avoid the feeling of awkward silence.

People in this theme prefer to ask real humans for directions or the time instead of relying on their electronic devices. Their preferences directly clash with people who want to be left alone and prefer a quiet environment while they travel.

When on vacation, some people become more of a social butterfly than at home. They find talking to a fellow tourist on the bus to the beach much easier and more fun than trying to engage with a grumpy commuter on an overcrowded subway. Besides, their minds are generally free from the noise of daily life when they’re on vacation, making them generally more cheerful and friendly.

“Sometimes I take the bus, simply because I like to make new friends.”

Maria Luzia, 62 – Brazil
Our future is important.
The world’s shared future is more important than my short-term comfort
I am doing what I can to preserve this planet for the next generation
I want to ensure that I stay healthy
I need to ensure that people are treated fairly

Key beliefs
- The world’s shared future is more important than my short-term comfort
- I am doing what I can to preserve this planet for the next generation
- I want to ensure that I stay healthy
- I need to ensure that people are treated fairly

Key behaviors
- I actively seek environmentally-friendly options
- I’ll pay extra for sustainable options
- Biking instead of taking public transport or a car
- I actively buy from companies that take social responsibility

MINDSET: HUMANITARIANS

Humanitarians are willing to change their instinctive behaviors if it’s for the greater good.

They’ll make huge gestures to serve a worthy cause, like making great efforts to live sustainably, picking their go-to brands based on social responsibility. It can be shown in choosing mobility modes that have an impact on their health and physical well-being.
Fitness factor

Personal health is a significant factor for some people. For them, mobility is not about getting somewhere but rather an opportunity to make healthy choices.

Some people consider the consequences of their transport choices on their personal health. Walking, running, cycling and other means of muscle-powered transportation are perceived as healthy, as well as a way to weave exercise and fitness into their daily routines. Some people are much more deliberate about these sorts of choices than others, whose healthy choices are less consciously made.

Some people get off the subway, tram, bus, etc. a couple of stops earlier to boost their step count for the day.

Genuine cycling advocates even ride in rough weather conditions such as rain, hail, snow and wind. This behavior can be intrinsically motivated and/or fueled by necessity to save money. Others switch willingly to more comfortable modes of transport when the weather is wet, or their cargo becomes too heavy or awkward (laptop, bag, groceries).

For people who cycle or run, road conditions, traffic, infrastructural challenges and security are determining factors for their choice of route and mode. A lack of information about these aspects can be a significant source of discomfort and stress.

For some people, health and well-being goes hand-in-hand with environmentally-friendly behavior. Riding a bike becomes a source of well-being for them, as well as for the environment.

“I prefer to walk a while to the cheaper parking area for the exercise. Weather isn’t important: I have an umbrella.”

John, 49 – UK
Leave no trace

In some cases, people’s mobility behavior is driven by their desire to protect their surroundings and sustain a healthy environment.

People are willing to adjust their behavior so that they can live in a cleaner environment and feel that they’re helping to preserve the planet for future generations. Their beliefs and attitudes influence their choice of certain mobility brands and modes, whereby they make choices based on companies’ ethical actions.

People are ready to compromise their level of personal comfort, journey time and costs if it means they can make a more environmentally-friendly choice. Some people make such decisions subconsciously and they don’t always reflect upon the positive impact of their actions.

The motivation for environmental responsibility can come from different sources. Some people would happily adapt their behavior if it was made law, but they wouldn’t be one of the first to make such a change voluntarily. Others happily adapt their behavior regardless of incentives or rules. To protect the environment, this group would rather walk, cycle or take mass transport vehicles.

Environmentally-conscious people are very careful about the products and brands that they choose to consume. Many believe that delivery services produce too much waste through packaging, although some still reluctantly use them because there are no alternatives that align with their beliefs. The most environmentally-friendly vehicles are still too expensive for some people who really need to use a car. Others become frustrated by the fact that they can only reach certain destinations by using environmentally-unfriendly means of transport.

Some people want there to be far fewer cars on the roads: they think that cars should be fully utilized or not exist at all. People who have a strong sense for environmental sustainability try to avoid private or individual on-demand solutions.

“I have a subscription for a car club. I did it because of green thinking and working about the environment.”

Anthony, 53 – UK
Social well-being

Some people consciously consider the social consequences of their mobility behavior.

People in this theme strive for a healthy society. They actively avoid or seek out modes and services that satisfy their claim on social responsibility. This also leads to the occasional or permanent compromise on personal comfort, speed or costs.

People have strong expectations towards the government/officials to solve mobility challenges for them and society.

Some people actively boycott services that treat employees badly and support those that align with their personal ethical beliefs.

Some people feel like they’re forced to use products and services from “evil” brands because they are the only ones that meet their demands on e.g. speed, comfort, costs, transport, accessibility, etc.

People want the government or officials to solve many of their mobility-related problems, like better infrastructure, free public transport or the introduction and enforcement of mobility-related laws and regulations for cars in cities.

“I won’t use Uber since the drivers are underpaid.”

Carin, 59 – Sweden
“To infinity and beyond.”

- Buzz Lightyear, 1995
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