

YOUTH AND MOBILITY



KANTAR



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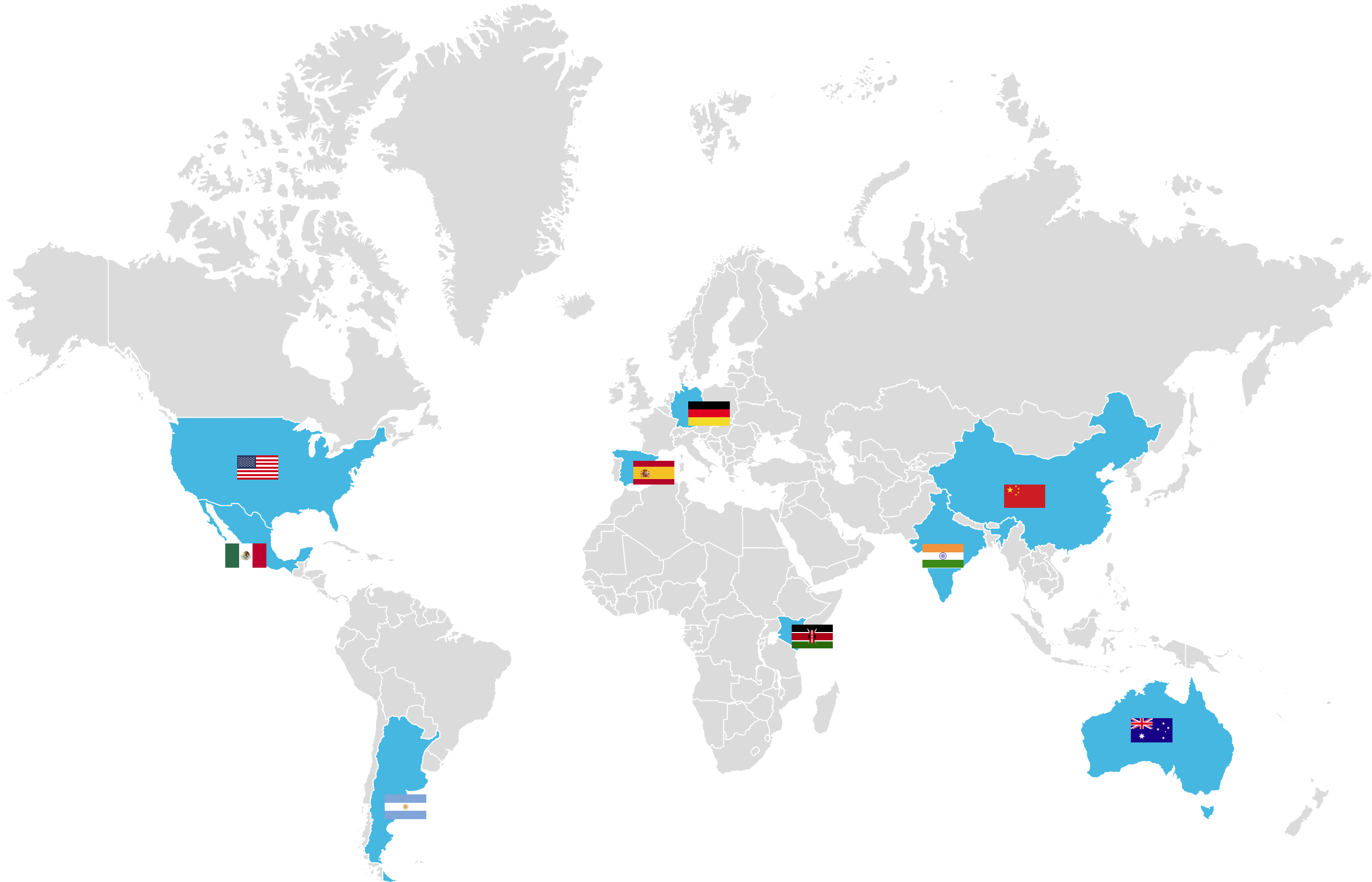
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METHODOLOGY

GETTING AN INTERNATIONAL VIEW ON GEN Z

WHERE?

- GERMANY
- USA
- AUSTRALIA
- INDIA
- KENYA
- MEXICO
- ARGENTINA
- SPAIN
- CHINA



WHO?

Sample of a total of 9000 interviews of 16-25 y.o. (Gen Z) representative of the demographics of each country.

1000 interviews per country.

Results were weighted by gender to ensure they are representative

WHEN?

17 April - 19 May 2023

HOW?

Survey using the CAWI methodology
10 min online questionnaire via Kantar panel and partners with different sections on:

- Socio-demographics
- Youth concerns and sustainable engagement
- Youth and mobility
- FIA Clubs

KEY FINDINGS

UNDERSTANDING GEN Z BEHAVIOURS AND EXPECTATIONS

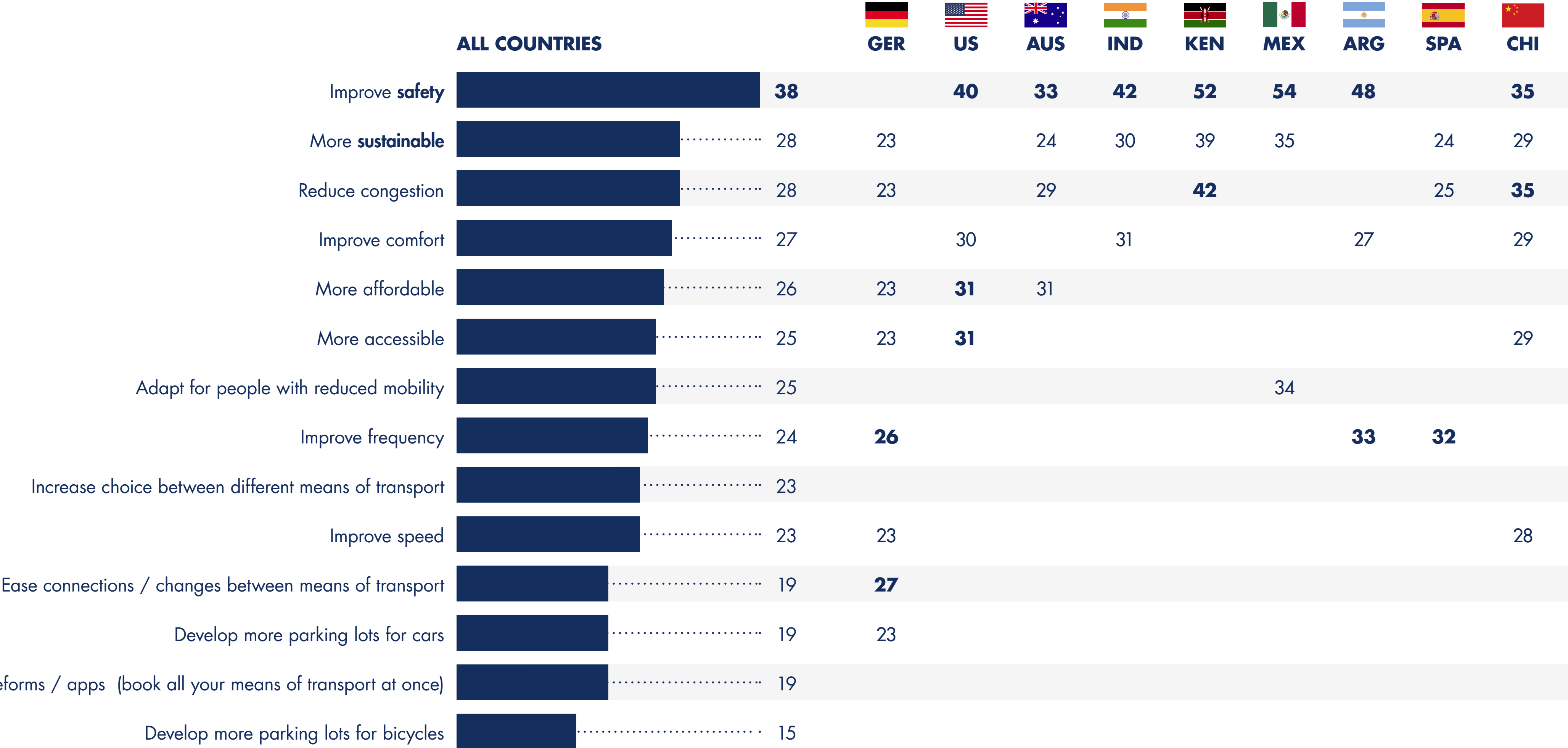


- Mobility is seen as essential to accessing education, work and basic services.
- For Gen Z, safety and sustainability are top priorities when it comes to mobility.
- The majority of Gen Z has a driving licence. Having a car remains aspirational for many.
- Developing access to public transport is essential for them to guarantee everyday mobility.
- Gen Z have strong and varied expectations towards mobility. They want to participate and are looking for a platform to be heard. They are willing to get involved in shaping the future of mobility.

RESULTS' HIGHLIGHTS

EXPECTATIONS IN TERMS OF MOBILITY

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 Gen Z have varied expectations concerning mobility. Safety and sustainability are among their top priorities.

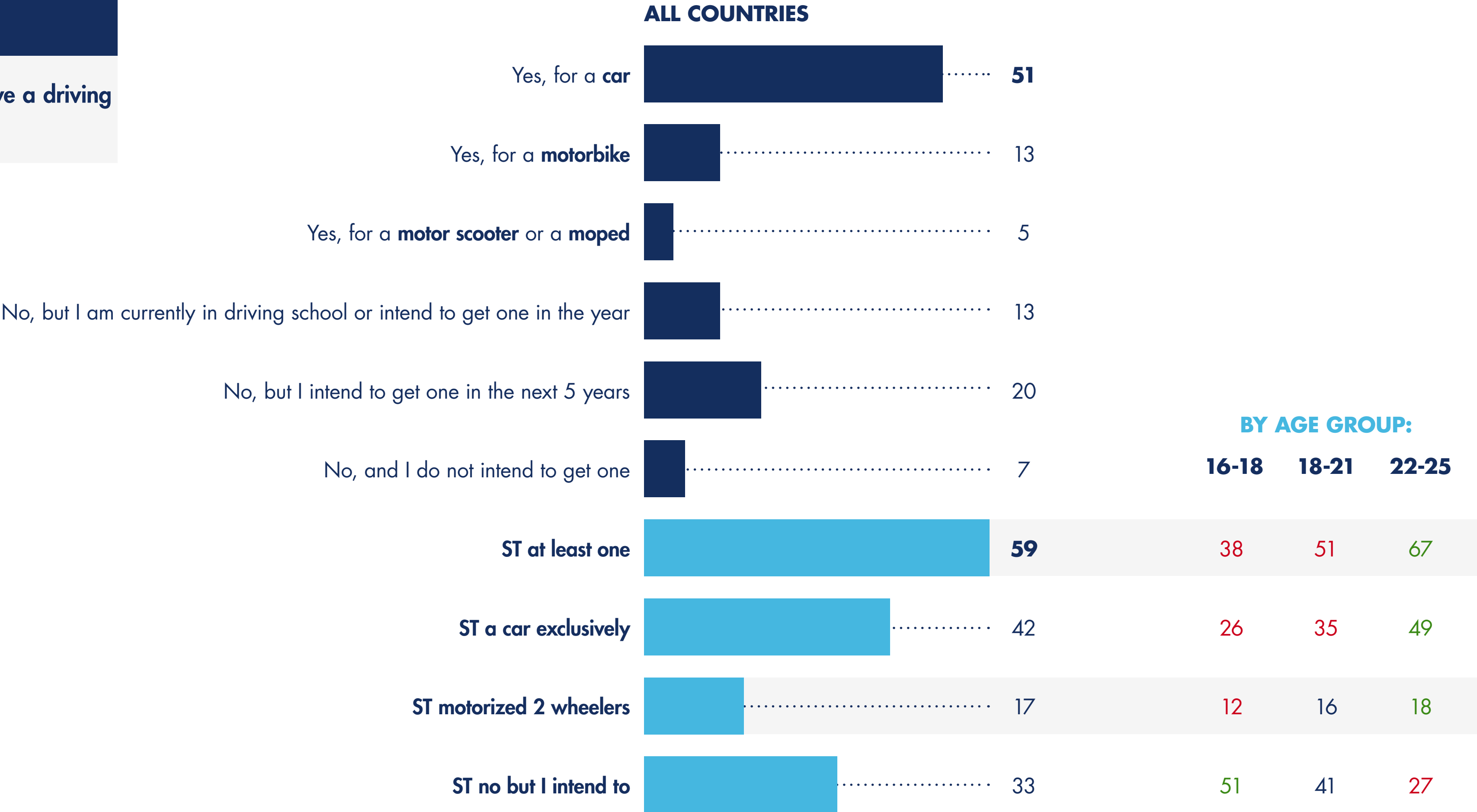


In %
 Base: All respondents (1000 per country)
 B10 Which improvements would you like in priority, to help you move in the environment where you live?

THE CAR: AN ASPIRATION

DRIVING LICENCES

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6 out of 10 Gen Z have a driving licence.



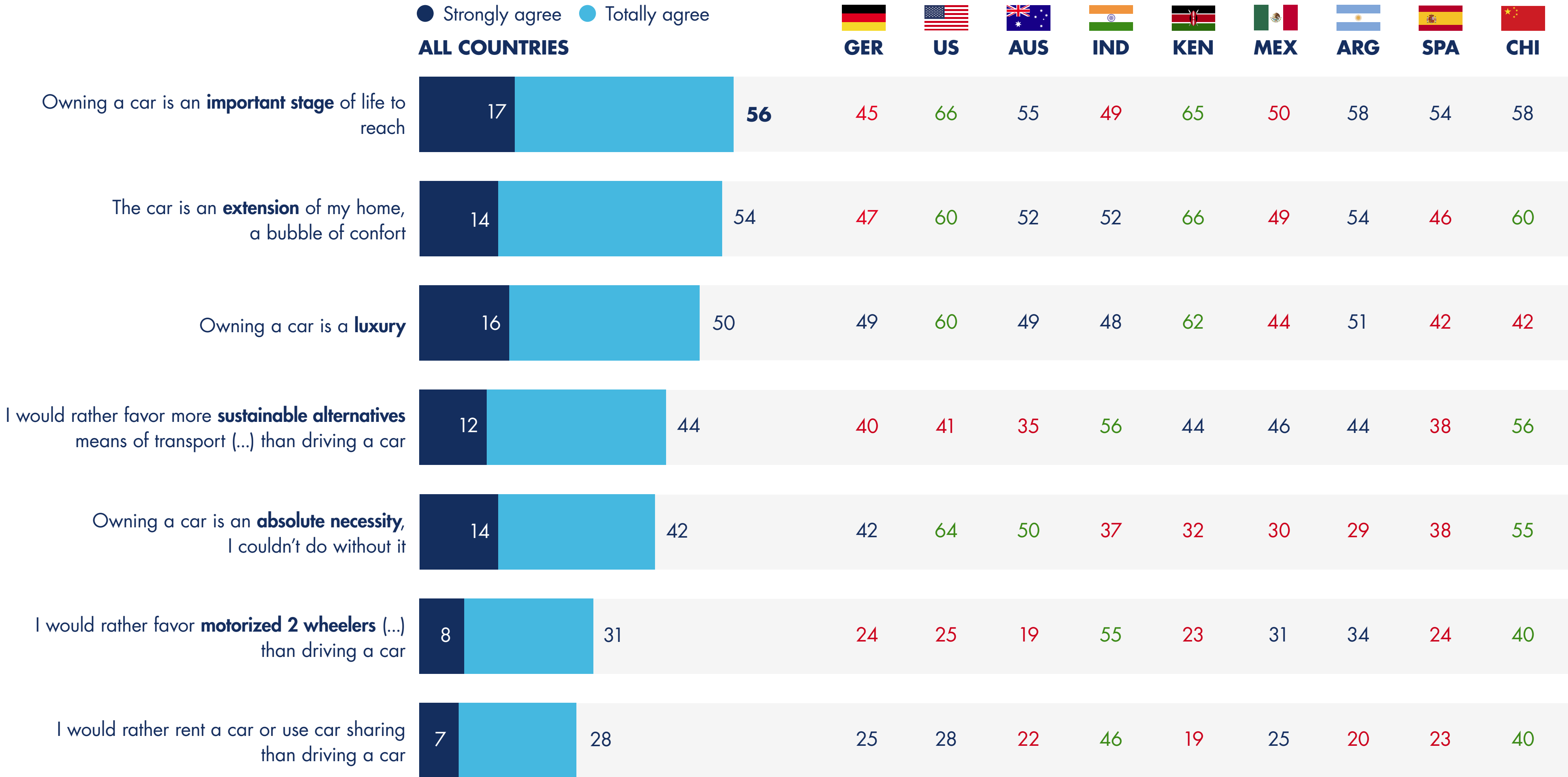
In %
 Base: All respondents (1000 per country)
 Do you hold a driver's license?

THE CAR: AN ASPIRATION

SENTIMENTS ABOUT CAR OWNERSHIP

Gen Z view car ownership as aspirational.

Cars are an absolute necessity in some countries, such as the US and Australia, but around the world young people have an emotional relationship with car ownership - viewing it as a key life stage and an extension of their home. Interestingly, Chinese respondents rely heavily on cars but also expect to see alternatives.



In %
 Base: All respondents (1000 per country)
 B11 When thinking more specifically about the car, whether you drive or not today, would say that...

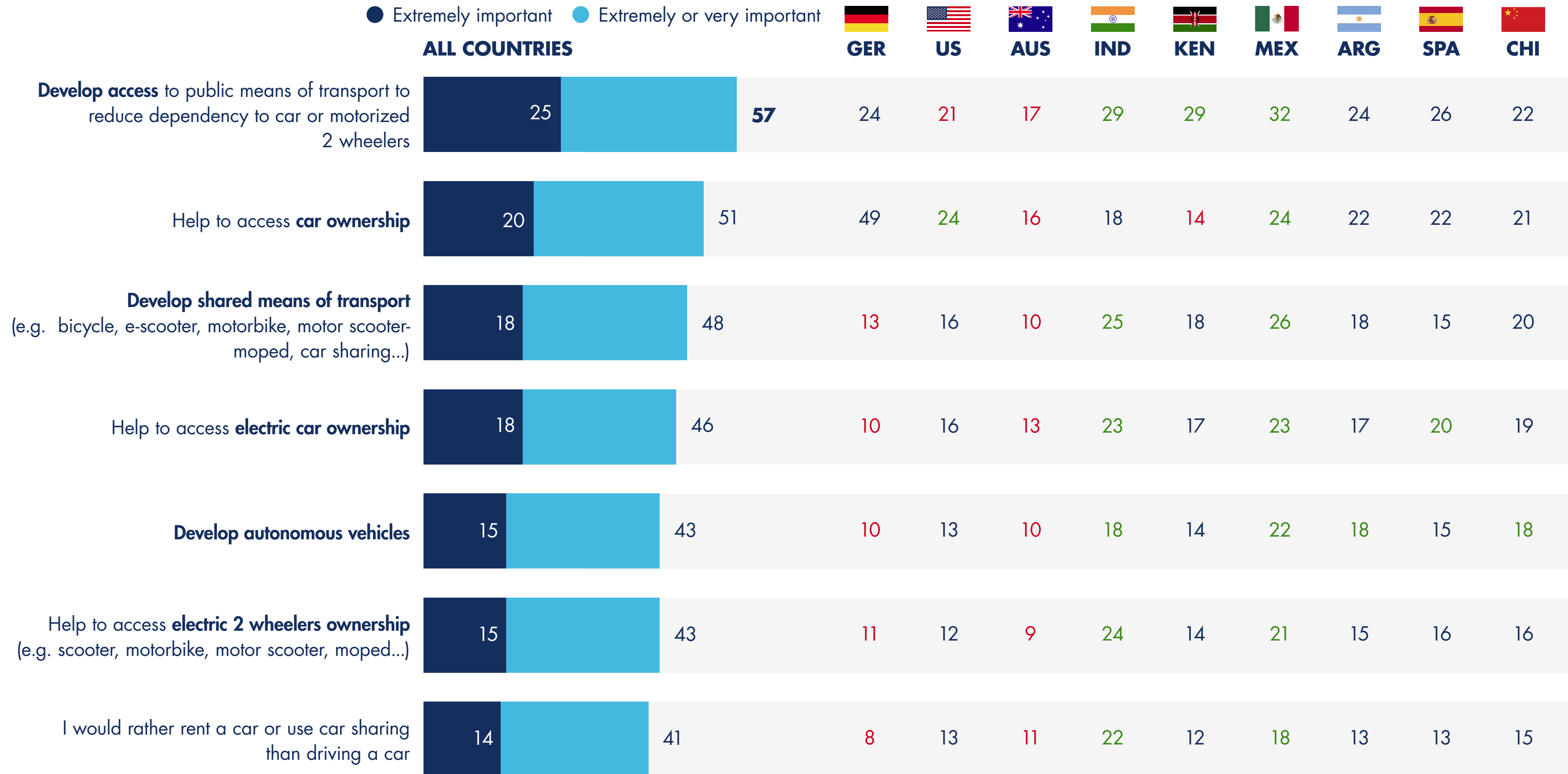
IMPORTANCE OF PUBLIC TRANSPORT FOR EVERYDAY MOBILITY

EXPECTATIONS AROUND FUTURE MEANS OF TRANSPORT



Access to public transport is seen as key for the future, being equally or even more important than access to cars or motorised two-wheelers.

US respondents are the exception, given their strong dependence on cars. Argentina and China respondents also show a stronger interest in autonomous vehicles. India and Mexico respondents are keen to improve the transport offering across the board.



In %

Base: All respondents (1000 per country)

B17 Here are different statements about means of transport in the future. For each of them, how much do you think it is important to develop them, to better move in the environment where you live?



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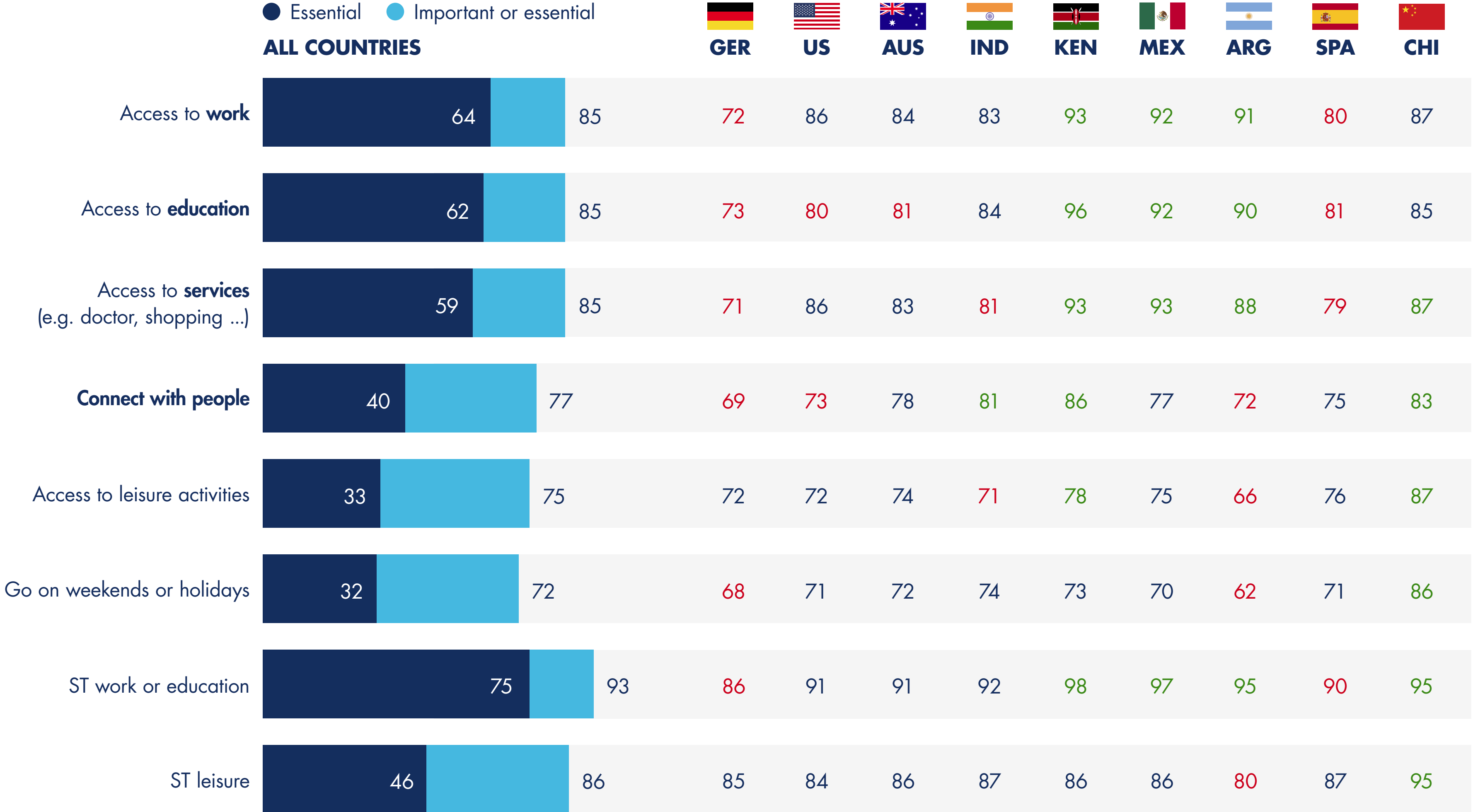
ACCESS TO BASIC SERVICES

IMPORTANCE OF TRANSPORT BY PURPOSE

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Means of transport are perceived as essential to accessing basic services such as work and education.

People who live in larger countries — like India, Kenya or China — also value cars as a way to meet or connect with others.

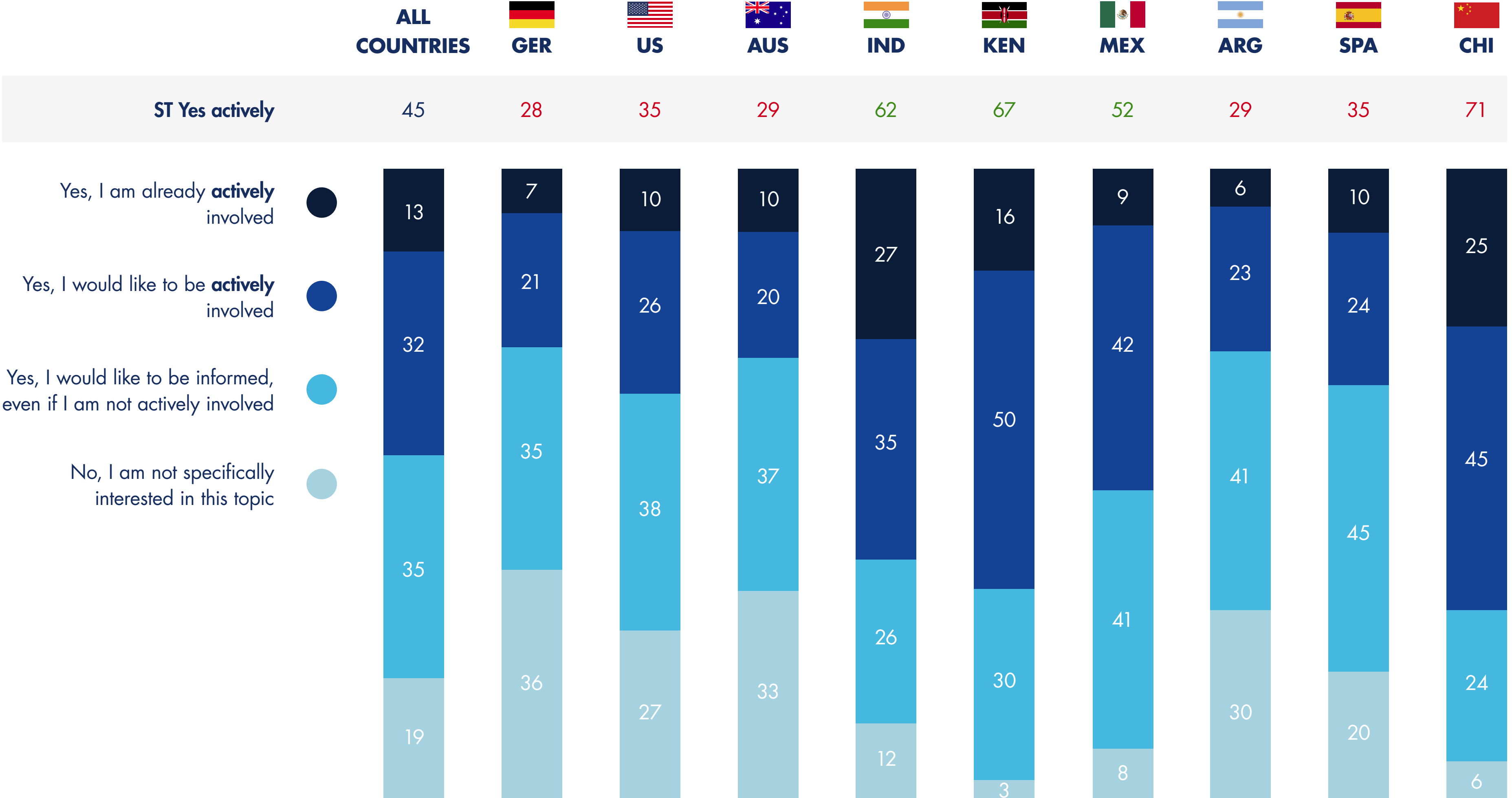


In %
 Base: All respondents (1000 per country)
 B5 How important access to means of transport is for you for the following purposes?

A WILL TO GET INVOLVED

INVOLVEMENT IN THE DEVELOPMENT OF MEANS OF TRANSPORT

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Gen Z want to take an active part in shaping mobility.
 Young people in Kenya, Mexico and China say that they are already actively involved.

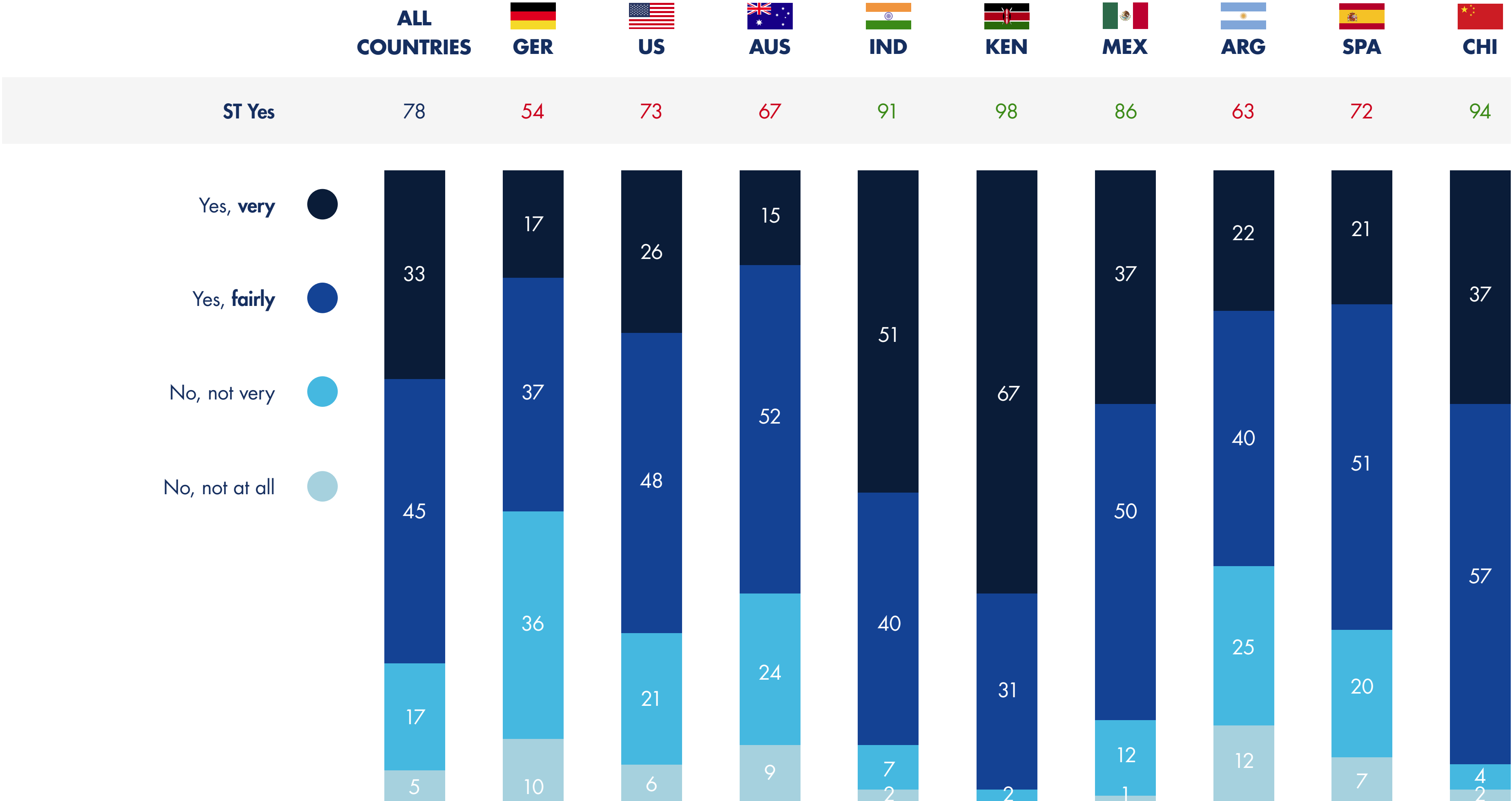


In %
 Base: All respondents (1000 per country)
 B15 Would you like to be involved in the development, changes, improvements of means of transport in the environment where you live?

A WILL TO GET INVOLVED

LEVEL OF INVOLVEMENT IN SAFE AND SUSTAINABLE MOBILITY

i
 They express a high interest in participating in safe and sustainable mobility, with the strongest levels of interest in India, Kenya, Mexico and China.



In %
 Base: All respondents (1000 per country)
 B16 Would you be interested in participating in the development of safer and more sustainable means of transport in the environment where you live?



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FOR THE FULL RESULTS, CONTACT: MOBILITY@FIA.COM