

Chello

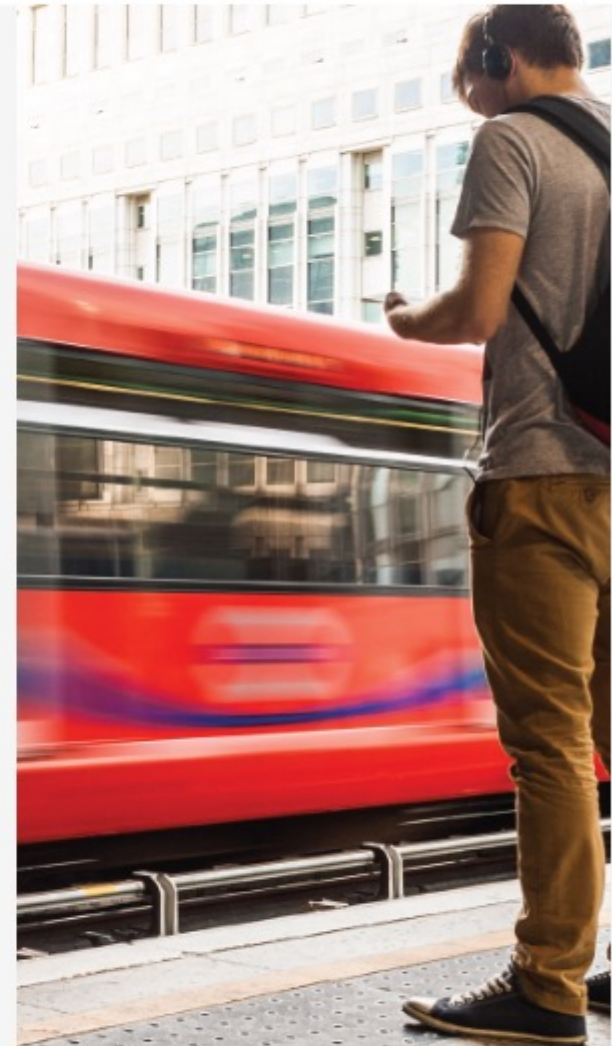
Let's Go!

01

Context of Research and Motivation

Problem Statement:

Mobility solutions today lack the adaptability required to fit the lifestyles of young people





Finding 1

Increase in remote working and digital nomadism means that personal mobility vehicles could become irrelevant to young people's lifestyles.



Finding 2

Young people could have changes in life and family situations very quickly.

02

Goal of Study

To explore if existing transport solutions have experience gaps for young people and identify the factors they require for their personal mobility



1. Identify if Young people desire for a personal transport that is affordable



2. Identify if Vehicles lack the adaptability that millennials require.



3. Understand if Young people prefer for various responsibilities to be carried out by others.



4. Get qualitative data on how many Young people could be open to entirely new mobility experiences and experiment with them.

Assumptions:

In terms of mobility,

1. Young people prefer personalisations and flexibility at affordable prices
2. Importance of owning a vehicle has diminished because it lacks adaptability
3. Young people dislike the responsibilities of vehicle ownership
4. Young people are open to experimentation and new experiences

Hypotheses:

1. A personal transport that is affordable could provide Young people the desired mobility option
2. Vehicles lack the adaptability that Young people require.
3. Young people prefer for various responsibilities to be carried out by others.
4. Young people could be open to entirely new mobility experiences and experiment with them




Key Research Questions:

EXPLORATORY

1. What do you consider when deciding on your mobility solution?
2. Why do you use your existing mobility solution?
3. What do you like/dislike about your existing mobility solution?
4. How would you rate your current existing mobility solution so far?
5. What is your current and expected lifestyles?
6. What would your desired mobility experience be like?

03

Methodology

 Methodology	 Tools	 Utilised For
Screeners Surveys	<ul style="list-style-type: none">• Question Template	<ul style="list-style-type: none">• Screener Surveys
Interviews Contextual Inquiry	<ul style="list-style-type: none">• Interview Template• Question Template• Script• Database• Ethics and Consent Form	<ul style="list-style-type: none">• To know the user journey• Find users needs• User pain points• Uncover users motivation• and feelings
Customer journey mapping	<ul style="list-style-type: none">• Guidelines• Notebooks	<ul style="list-style-type: none">• Create a narrative to clarify the results obtained• Clearer map of people behaviour and thoughts over a process
<ul style="list-style-type: none">• Thematic Analysis• Affinity diagram	<ul style="list-style-type: none">• Online whiteboard• Database	<ul style="list-style-type: none">• Gives holistic view of service, identifying gaps• Uncover problems• Identify design opportunities

04

Procedure



Day 1 to 7

1. Craft screener survey.
2. Recruit participants through screener survey.
3. Identify participants to interview by studying screener survey results.

Material: *Screener Survey*



Day 8 to 15

4. Craft interview questions and prepare consent forms.
5. Prepare location (i.e., Miro) to store the data.
6. Depth inter with participants.
7. Collect data.

Material: *Interview Questions*
Consent Forms



Day 16 to 18

8. Analyse data via thematic analysis.



Day 19

9. Create Customer Journey Map.



Day 20

10. Contrast data with desk research
11. Prepare research report.

Data found in Desk Research

Inquiring more about young people

Contrasting Generation Z with other generations

As the table shows, generations are shaped by the context in which they emerged.

Generation Z was born on the border of two Millennia, and as the youngest generation, it now embodies the zeitgeist of the contemporary world.

Contextual backgrounds for successive generations

	Baby boomer 1940-59	Gen X 1960-79	Gen Y 1980-94	Gen Z 1995-2010
Context	<ul style="list-style-type: none">• Postwar• Cold war	<ul style="list-style-type: none">• Political transition• Capitalism and meritocracy dominate	<ul style="list-style-type: none">• Globalization• Economic stability• Emergence of internet	<ul style="list-style-type: none">• Mobility and multiple realities• Social networks• Digital natives
Behaviour	<ul style="list-style-type: none">• Idealism• Revolutionary• Collectivist	<ul style="list-style-type: none">• Materialistic• Competitive• Individualistic	<ul style="list-style-type: none">• Globalist• Questioning• Oriented to self	<ul style="list-style-type: none">• Undefined ID• "Communaholic"• "Dialoguer"• Realistic
Consumption	<ul style="list-style-type: none">• Ideology• Vinyl and movies	<ul style="list-style-type: none">• Status• Brands and cars• Luxury articles	<ul style="list-style-type: none">• Experience• Festivals and travel• Flagships	<ul style="list-style-type: none">• Uniqueness• Unlimited• Ethical

Source: McKinsey & Company (2018), 'True Gen': Generation Z and its implication for companies

How Different Is Generation Z?

One characteristic with Generation Z can be labelled 'feeling good'.

There are many stories surrounding helicopter parents who expend a huge amount of energy in protecting their little children (even in their mid-20s) against all the uncertainties of life. Helicopter parents confront teachers when they criticise their kids, allowing the kids to feel really good, since the teachers are not allowed to give them bad grades. Everything is taken care of.

Generation Z expects this not only in the family and at school: feeling good is also important for them in companies. Of course, other generations also like feel-good managers. But Generation Z demands a 100 per cent feel-good environment at home, at school, at work.

[Source: GENERATIONS Z IN EUROPE: INPUTS, INSIGHTS AND IMPLICATIONS](#)



To understand the future, we have to comprehend young people

In the EU, Gen Z are the most diverse generation when it comes to their origins, and best educated, in terms of level of education.

They are the most vulnerable, including on the labour market.

They are the generation most at risk of poverty, and worst affected by the lack of intergenerational earning mobility.

In addition, they have been hardest hit by the coronavirus crisis, following school closures and also job losses.



Access over ownership:

Similar to Millennials, Gen Zers value independence and flexibility highly, given that these generations have both grown up during the era of digitisation, location-independent work and the flexibility that online booking brings.

This and the lack of disposable income have led to them fully embracing the collaborative economy.

As a result, they are highly open-minded about sharing or renting their cars, homes, clothes, equipment.



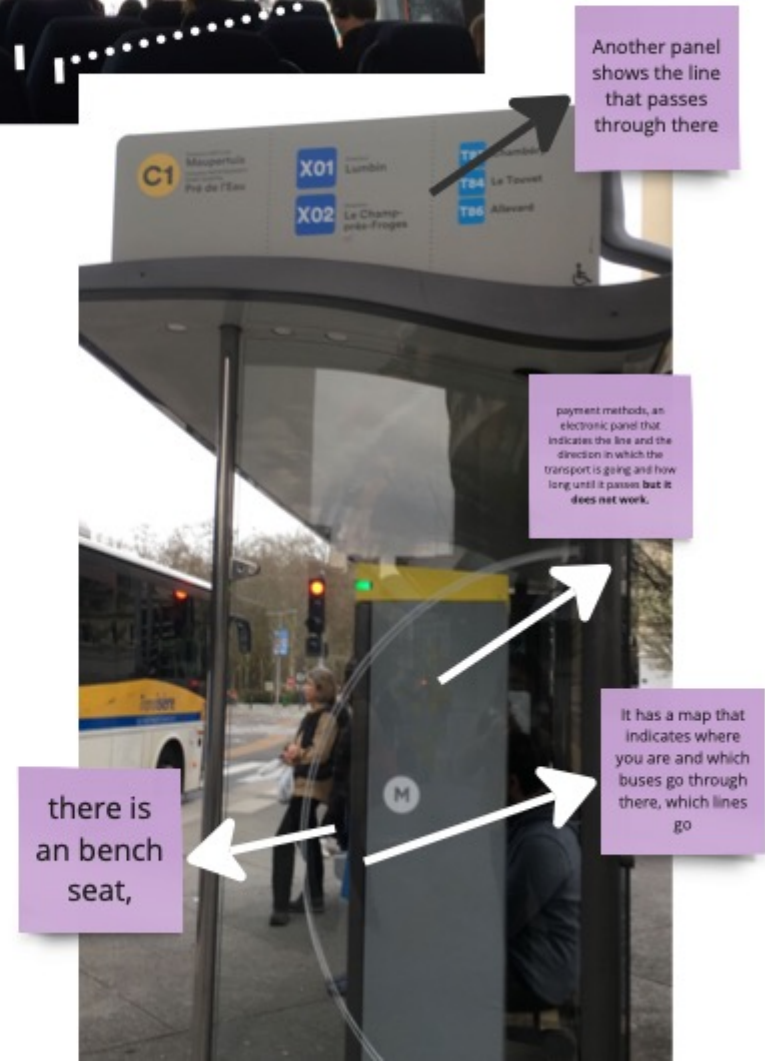
Contextual Inquiry Photos

Insights:

- Painpoints
 - Exposure to weather elements
 - Lack of Privacy due to exposure to crowds and limited space
 - Poor Inter-channel connectivity where apps or displays do not help the user along their journey effectively with information or feedback they require
 - Lack of Reliability due to features that do not function as intended such as electronic panels that do not work
 - Cognitive overload from maps that do not provide specific information users need
 - The consistency of experience is lacking, for example if all the seats are taken up, then the user does not get a bench seat while waiting

Conclusion:

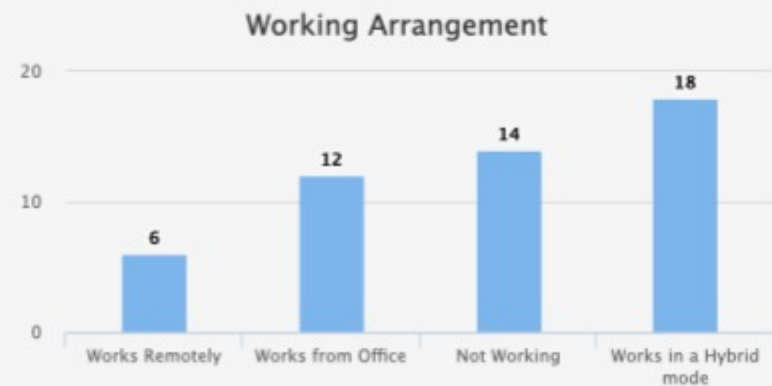
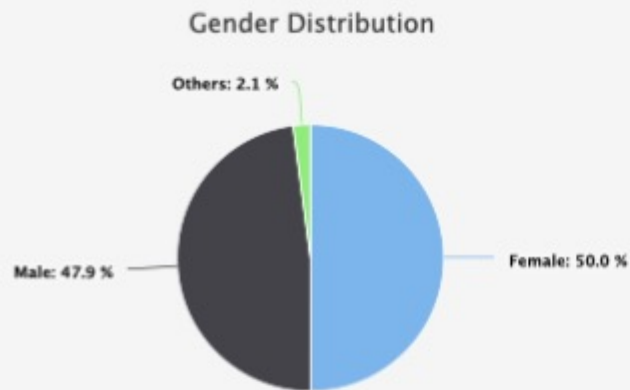
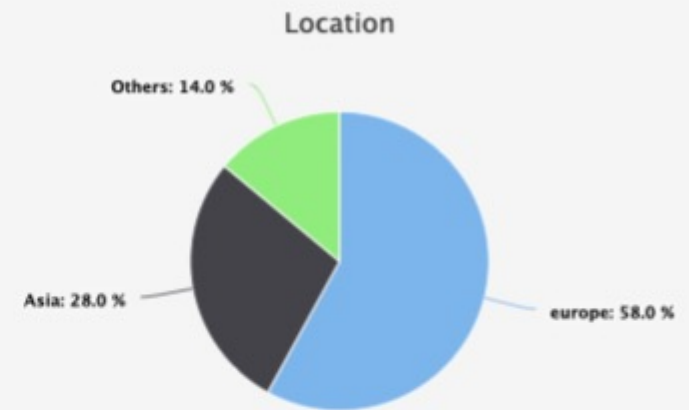
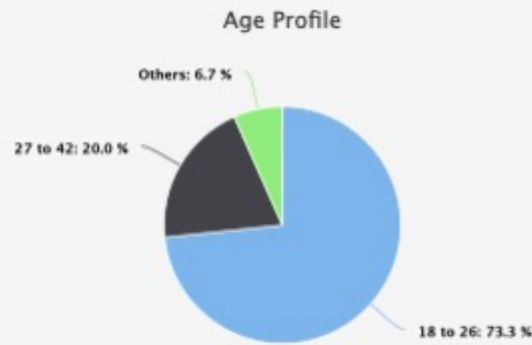
Users are reliant on public transport services that do not deliver a consistently good or usable experience that can cause stressors related to privacy, reliability and information overload.



Research Outcomes

Survey Findings

Quantitative and Qualitative Research



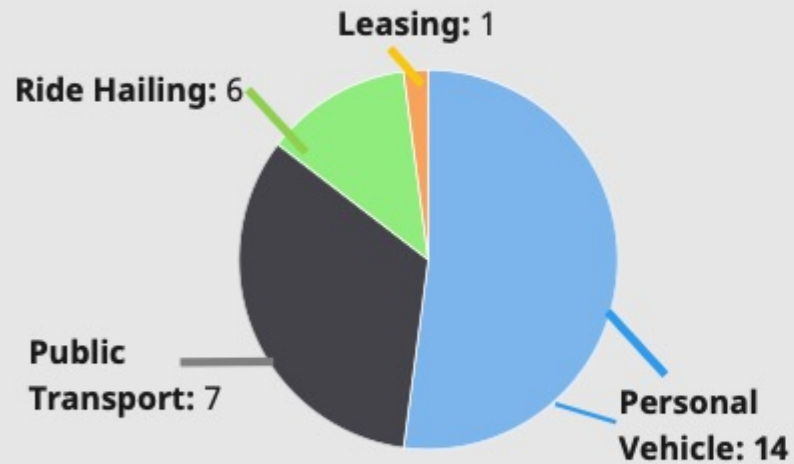
Participants

We surveyed 50 participants of which more of 70% were Generation Z (aged 18 to 26). The genders of the participants were evenly distributed.

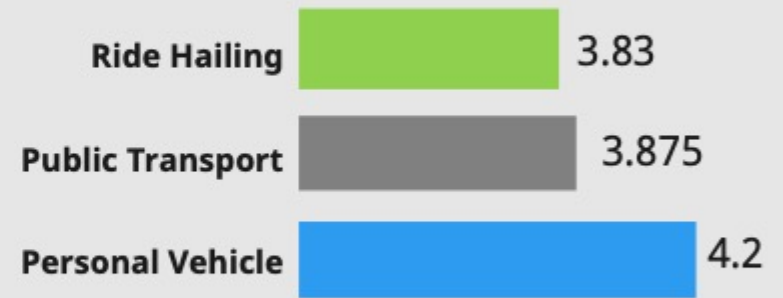
There were 4 main categories for the working arrangements of the participants with working in a hybrid mode the dominant group, those who are not

working, such as students and those who work from office. There was a small group of people who worked remotely.

Transport Mode Used Most Frequently all participant



Experience Rating (1 - Low, 5 - High)

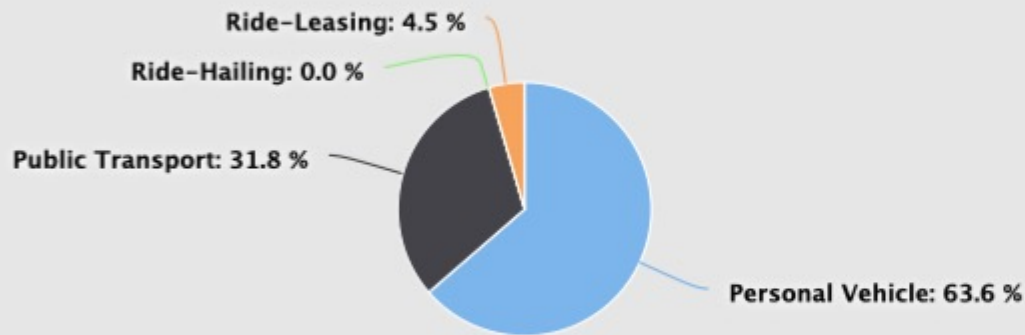


Most of the participants surveyed use their own vehicles such as cars or bikes and they rated their experiences as very satisfied at an average score of 4.2 out of 5.

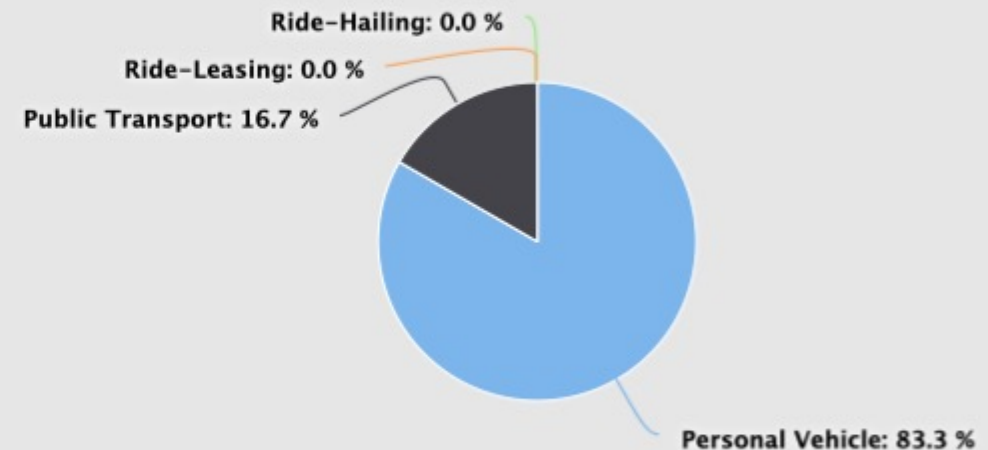
The second most frequently used transport mode was public transportation and it had an average satisfaction score of 3.875 out of 5.

The third most frequent mode of transport used was ride-hailing and the participants rated their satisfaction for such transport at an average score of 3.83 out of 5.

Most Frequent Transport Mode by European Gen Z



Most Frequent Transport Mode by Europeans Millennials



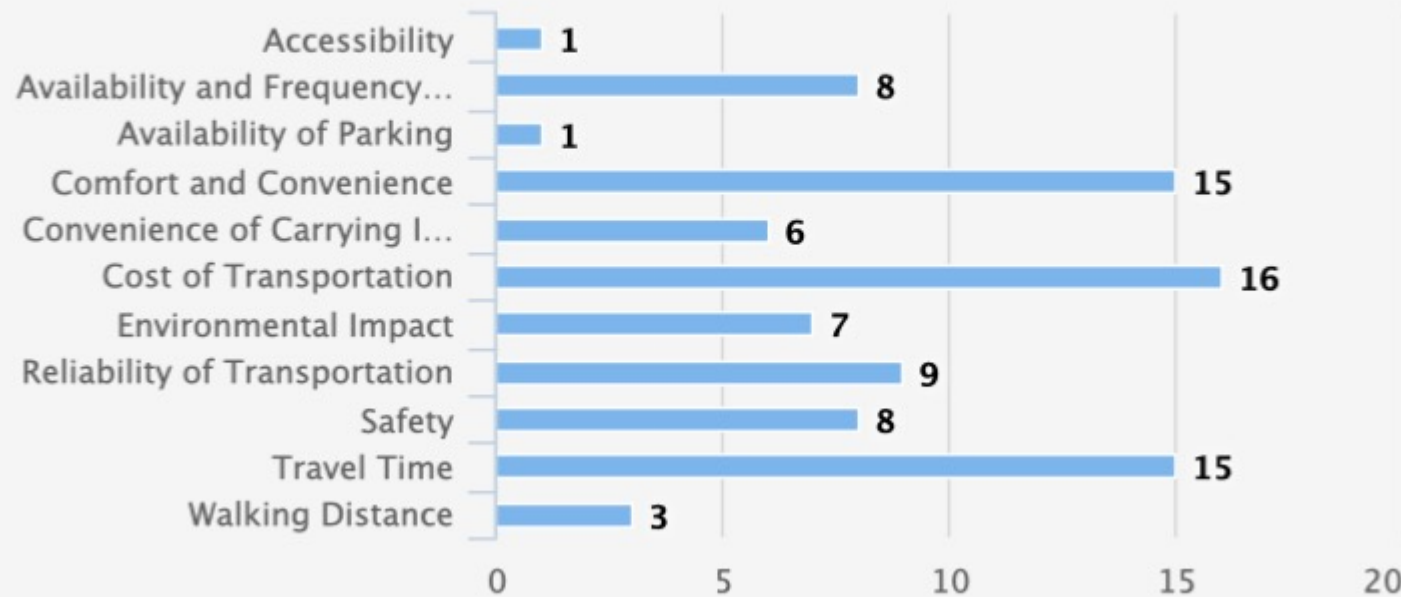
Therefore, Gen Z surveyed use their own vehicles such as cars or bikes and they rated their experiences as very satisfied at an average score of 4.2 out of 5.

The second most frequently used transport mode was public transportation with a 58% and it had an average satisfaction score of 3.875 out of 5.

71.4% of people who use public transport would like to have a car, and the rest would like to use public transport or ride hailing services

The less frequent mode of transport used was ride-hailing and the participants rated their satisfaction for such transport at an average score of 3.83 out of 5.

Transportation Considerations by all participants



As opinions of the transportation systems among continents could vary, we studied 29 European, 11 millennials, 18 Gen Z, and found that the top three considerations for transport were:



**Transport
Cost**

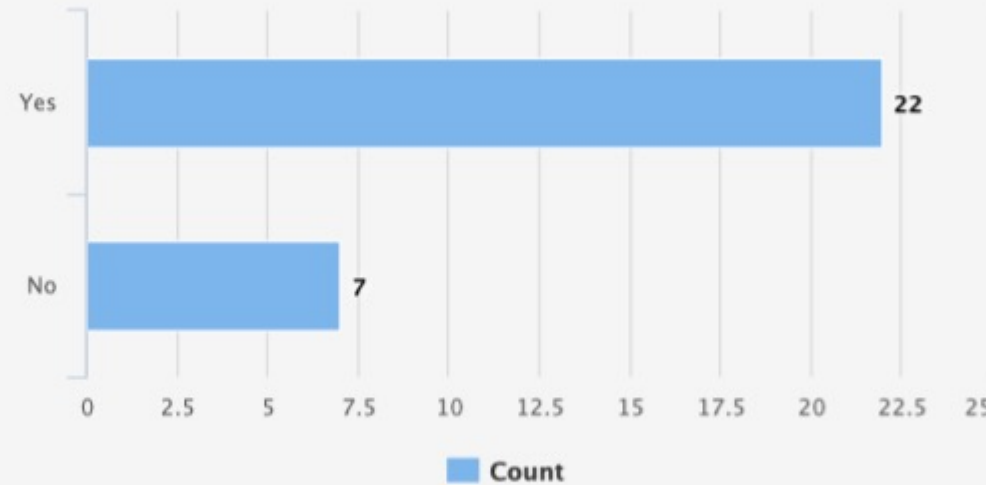


Travel Time



**Comfort and
Convenience**

Preference for Transport Ownership



We wanted to understand if Millennials and Gen Z preferred for various mobility responsibilities to be carried out by others. The findings showed that Millennials mostly preferred ownership of their transport.

The primary reason for their preference is due to independence of the transport option where they can go anywhere anytime on whenever they like.

A secondary reason was for comfort from owning their familiar mode of transport that belongs to them.

Lifestyle Expectations

We surveyed the participants' expectations of changes to life situation, place of stay and work situation. As socio-economic situations could differ, we studied only European generation Z. The dominant perspective held was that there would be changes in respect of all 3 aspects.

To note, of the 9 who informed no change to their work situation, 7 said there would be no change from working on hybrid mode.



Research Outcomes

Interview Findings

Thematic Analysis

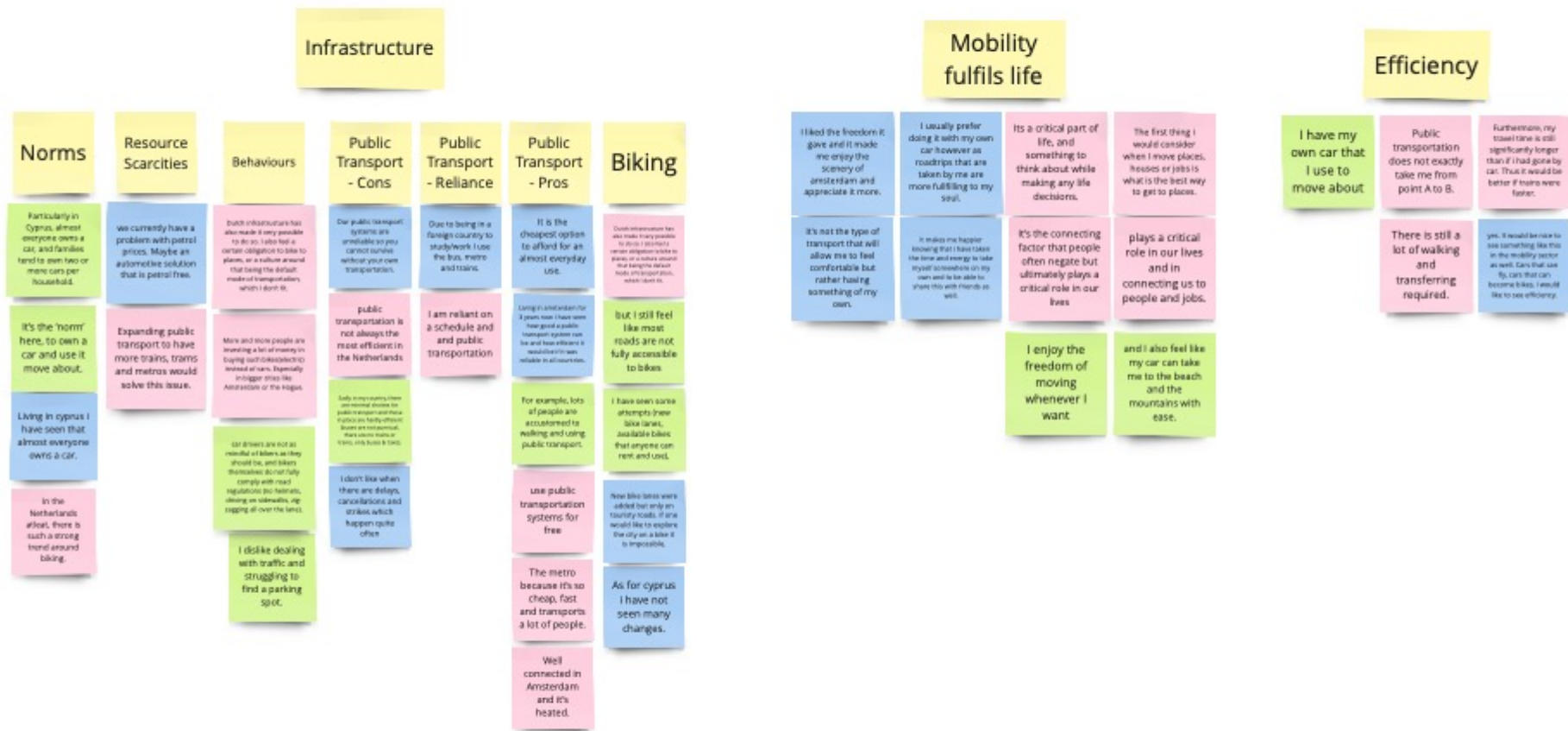
Thematic Analysis - Themes



Affinity Map



Affinity Map





Meet Maria,

Aged 25, Student
Single without a partner
Takes public transport
Rates travel experience at 2.8/5

She is currently a Masters student studying in The Netherlands, which is not her home country.

During Covid, she was unable to return home and due to loneliness, went through feelings of fear and depression.

Her hobbies are travelling, listening to music and sharing her life with her friends.

I'm so reliant on public transportation and its schedules. I wish I had a



Needs

- Low-cost transport
- Efficient and reliable transportation
- Safety



Dislikes

- Relying on a schedule
- Service disruptions
- Crowds



Goals/ Aspirations

- To have choices in transportation
- To have her own vehicle at some point in life



Likes

- Independence
- Freedom
- Convenience

Empathy Map



Pains

- Relying on a schedule
- Dealing with other people
- Service disruptions
- Crowds

Gains

- Independence
- Freedom
- Convenience

Interview Quotes

Lifestyle

*"Mobility, is a critical part of my life, and something to think about while making any **life decisions.**"*

*"I am not a fan of biking in the cold weather, which is why I would prefer transportation that **ensures that i am warm** during the commute"*

User Impact

*"Public transportation is very expensive, so **rely** on private bus transportation eg. Flix bus which is a fraction of cost. But it takes **3 times more duration, inconvenient and exhaustive.**"*

*"During the pandemic lockdown, due to **lack of mobility** and not able to meet friends and family, I **went through feelings of depression, loneliness and insecurity.**"*

Experience

*"Public transportation **does not exactly take me from point A to B.** it is more like I use these services to get to the closest I can from point A to B. there is still **a lot of walking and transferring required.***

Added touch points lead to delay, missing appointments and lot of replanning. Last minute cancellations of trains are frustrating"



Maria

Masters Student | 25 years

Journey goal: Arrive at destinations at anytime, anywhere safely and at low-cost.

<p>Journey Step</p>	I choose the housing location based on the mobility facility	Look for options to commute, so that i can meet my friends and family on a regular basis	Finds a housing which is affordable, however a bit far to reach public transport connectivity.	Start walk / bike for 10-15 mins on an average and reach public transportation	Public transport is not always reliable, there is a variation with the schedules.
<p>Feeling</p>					
<p>Thought</p>	Its a critical part of life, and something to think about while making any life decisions.	I do not have resource such as license to drive a car, dislike biking. Hence public transport is the only viable option	I can walk or bike a reasonable distance and take the public transport to reach point B	My travel has almost doubled due to added tough points to reach from point A to point B	Many time end up having a 3-4 times of the travel time with many touch points to reach from point A to point B
<p>Improvement opportunities</p> <p><i>What measures should be taken in this step from the service side?</i></p>	<ul style="list-style-type: none"> • Improved Infrastructure. • more accessible to remote locations 	<ul style="list-style-type: none"> • Point A to Point B private mobility options. • Autonomous vehicles 	<ul style="list-style-type: none"> • Last mile infrastructure • improved public transport infrastructure 	<ul style="list-style-type: none"> • Faster mode of reaching Point A to Point B 	<ul style="list-style-type: none"> • App alerts for public transportation. • Replan quickly and alternative options, public or private.

Key insights



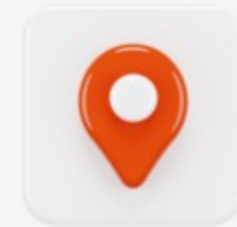
Key Insight 1

Mobility affects the quality of life for young people and whether they achieve their life priorities



Key Insight 2

Young people travel to connect with themselves and connect with others. This is very important for their mental health.



Key Insight 3

Infrastructures impact lifestyles and to obtain desired lifestyles, young people had to make decisions such as to move to more desirable locations with suitable infrastructure are made or to take inconvenient transportation that was cheaper.

Thank You