

August 2023

What are the habits and views of young people regarding urban mobility and delivery?

A study of 10 EU cities that aim to become climate neutral and smart by 2030



Generation
Climate
Europe

TABLE OF CONTENTS

Executive summary	1
Map of selected cities	3
Introduction	4
Results	
• Brussels	6
• Budapest	8
• Cluj-Napoca	10
• Dublin	12
• Groningen	14
• Krakow	16
• Lisbon	18
• Lund	20
• Lyon	22
• Thessaloniki	24
Key findings	26
Policy recommendations	30
References	32

Executive summary

This study analyses the habits and views of young people regarding urban mobility and delivery in 10 chosen EU cities that aim to become climate neutral and smart by 2030. 112 cities are participating in a European Union mission to become climate-neutral and smart cities by 2030. As transport contributes a third of urban emissions, with last-mile deliveries causing 20-30% of CO2 emissions, prioritising clean transport is pivotal in achieving the objective of climate neutrality. Young people play a crucial role in furthering clean urban mobility, as they are the driving force behind future transportation trends and sustainable practices. Understanding their needs and preferences is important in order to design effective and inclusive clean mobility solutions that resonate with their lifestyles and aspirations. Understanding their delivery habits is also critical due to concerns about last-mile deliveries, such as rising emissions and the need for efficient use of urban spaces. There is an information gap in the literature that we address through a survey and analysis of young people's mobility and delivery preferences in ten diverse EU cities.



Key Findings

Urban mobility use and satisfaction

1. Walking is the most common transport mode in most cities among young people.
2. Results show a bimodal distribution where young people either cycle regularly or never cycle.
3. Public transport, including buses, trams, and metros, is commonly used by young people in most cities. Satisfaction with public transport varies.
4. Low scooter usage has been observed in many cities.
5. Car usage among young people in the cities analysed is mixed, with a substantial number using cars regularly and, in contrast, a significant portion never using cars.
6. Dissatisfaction with urban planning is expressed, in particular, by inadequate road infrastructure, dangerous traffic lights, overall poor city organisation, a lack of a long-term vision, and the reliance on only one transport mode

Delivery habits

1. Online deliveries are commonly used among young people, with varied use patterns.
2. Young people mostly order clothes, footwear, and accessories online.
3. The most important reason for online delivery is to save time and provide convenience.
4. There is a willingness among some young people to accept longer delivery times if it were more sustainable. However, the priority for young people remains affordability over sustainability.

Policy Recommendations

Cycling and walking

- Invest in safe and extensive cycling and walking infrastructure (well-maintained sidewalks, pedestrian crossings and safe pedestrian areas).
- Implement low or no-emission zones and lower speed limits for cars.

Public transport

- Establish a comprehensive, accessible public transport system.
- Prioritise improved weekend and night services, strengthen connectivity.
- Implement clear schedules, real-time information for better user experience.
- Diversify transport modes: invest in tram, metro and intra-city rail services, wherever appropriate in the specific city.

Scooter

- Implement scooter-sharing schemes and micro-mobility options.
- Invest in educational communication for safe scooter usage and balance safety and accessibility for sustainable micro-mobility success.
- Address safety, recycling, and sustainability concerns.
- Develop proper infrastructure, such as lanes and parking facilities.

Urban planning

- Prioritise accessibility, people-centred design, and long-term urban resilience.
- Consider diverse needs, including affordability in Low Emission Zones.
- Adopt a long-term mobility vision, including a comprehensive, forward-looking approach to urban planning.
- Address road infrastructure, traffic flow, and city organisation issues.
- Plan for integrated mobility solutions: public transit, cycling lanes and pedestrian zones.

Last-mile deliveries

- Prioritise cost-effective and sustainable delivery methods like cargo bikes, lockers, and dedicated lanes.
- Foster eco-friendly last-mile logistics with electric vehicles and central drop-off points.
- Implement a holistic approach incorporating nudging tactics, sustainable delivery subsidies, business partnerships, and ongoing assessments to achieve a balanced alignment of convenience, affordability, and eco-friendliness of online delivery.
- Promote mindful online shopping with education campaigns to promote environmentally and socially conscious online shopping to reduce environmental and social impact.

Map of selected cities



Introduction

112 cities (100 in the European Union and 12 in associated partner countries) are participating in a mission to become climate-neutral and smart cities by 2030 (1). To reach this goal, cities have to drastically reduce their emissions. Notably, transport generates one-third of urban emissions (2), and last-mile deliveries account for 20-30% of cities' CO2 emissions (3). Young people and elderly people are the biggest users of public transport (4), making it important to understand their habits and preferences. They play a crucial role in furthering clean urban mobility, as they are the driving force behind future transportation trends and sustainable practices. Understanding their needs and preferences is important in order to design effective and inclusive clean mobility solutions that resonate with their lifestyles and aspirations. By actively involving young people in urban planning and decision-making processes, cities can harness their innovative ideas to create a greener, more efficient, and accessible transportation landscape. Furthermore, by recognising and nurturing the role of young people in shaping the future of urban mobility, cities can pave the way for a more environmentally friendly and socially equitable urban environment.

However, the mobility research landscape, as well as the actual design of many transportation services, has given young people insufficient attention (5). To date, little is known about young people's mobility habits, and the few studies that are available focus on single cities or countries, while comparative data is missing. Therefore, we addressed this information gap by analysing young people's mobility preferences in ten diverse European cities. There is also a lack of knowledge on young people's delivery habits, which is important given the interdependence of delivery options and urban mobility being rooted in economic and environmental considerations, and the need for efficient use of urban spaces.

Integrating these aspects can lead to more sustainable, efficient, and livable urban environments.

The importance of understanding young people's delivery habits results from several factors. First, young people in Europe account for a high share of citizens who order online. 87% of all 25-34 year old internet users ordered online in 2022 (6), which is the highest percentage for an age group-. This statistic underscores the relevance of studying their delivery preferences, as delivery services exert a notable influence on urban mobility, impacting factors like traffic congestion, emissions, transportation efficiency and neighbourhood aesthetics. Particularly problematic in urban areas is the last-mile of deliveries, the final stage where goods move from distribution centres to end-users in city centres or residential zones. Negotiating these densely populated and congested environments presents considerable challenges that need to be addressed. By studying young people's delivery habits, urban planners, and policy-makers can gain a better understanding of the demand for last-mile deliveries, guiding the development of sustainable and efficient transportation solutions. Moreover, with growing environmental concerns, studying young people's delivery habits can shed light on their willingness to adopt eco-friendly delivery options. This information can encourage the implementation of green delivery practices, such as electric or bicycle deliveries, contributing to reduced carbon footprints and more sustainable urban logistics. It can inform policymakers about the potential need for regulations or incentives to promote sustainable delivery practices. Overall, this can help shape policies that support environmentally friendly delivery services and foster responsible urban development

Methodology and scope

Out of the 112 cities that are participating in the EU mission, ten European cities were chosen that best represent a range of different urban settings across different geographical areas and countries. The cities also have a high proportion of young people living in them. The 10 cities analysed are: Brussels, Budapest, Cluj-Napoca, Dublin, Groningen, Krakow, Lisbon, Lund, Lyon, and Thessaloniki.

In July 2023, Generation Climate Europe published two online surveys of the same questions, one on Pollfish and one using Google Forms. This allowed us to reach a wider audience and ensured a good volume of responses from which we could extrapolate. The survey respondents were 18 to 30 years old and residents of one of the ten cities of study. Total responses were 491.

This report summarises the findings from these surveys and is enriched by research on the cities' relevant policies. We gathered feedback on the problems and challenges that young people face, as well as the positive aspects. In addition, the survey collected data on young people's delivery habits as well as their reasons and preferences. It also inquired if, and under which conditions, young people would accept more sustainable forms of delivery.

The next pages report the key findings from each of the ten cities by detailing some key statistics from the responses gathered and several chosen quotes from the pollees' answers. The information will then be analysed and used to draw policy recommendations at a later stage of the paper



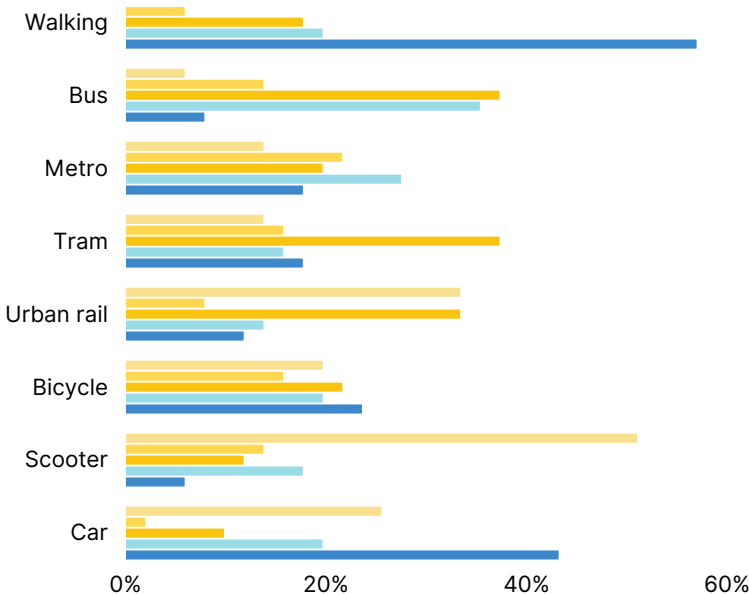
BRUSSELS

Brussels has a population of 1,235,192 inhabitants. The Belgian capital is also the administrative centre of the European Union, as it hosts a number of principal EU institutions

In Brussels, 76% of young people walk regularly. The metro (44%), buses (43%), and trams (32%) are also popular choices. Respondents appreciate the accessibility and convenience of public transportation, but some complain about outdated vehicles. Dissatisfaction with buses, in particular, stems from overcrowding, infrequent service, and limited routes. Cycling is common (42%), but safety concerns and inadequate infrastructure trouble 19% of those who never cycle. Scooters are more or less unpopular (50% never use them), yet 22% use them regularly. Although 25% of young people abstain from cars, a majority (62%) still drive, suggesting potential for eco-friendly alternatives.

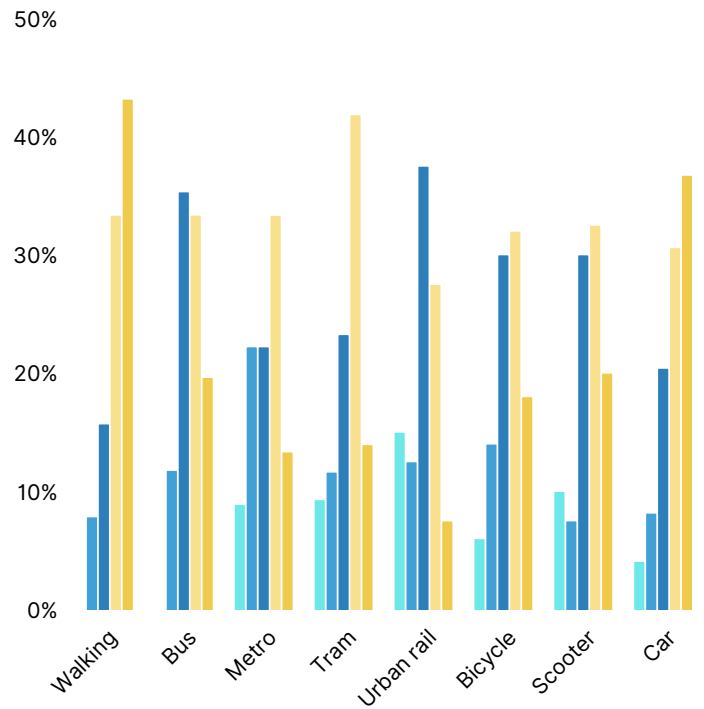
Regularity of urban mobility modes

■ Never ■ Few times ■ Sometimes
■ Regularly ■ Extremely regularly



Satisfaction with urban mobility

■ Very dissatisfied ■ Somehow satisfied ■ Satisfied
■ Very satisfied ■ Extremely satisfied



“ **Brussels should keep reducing the amount of cars, and support affordable alternatives.** ”

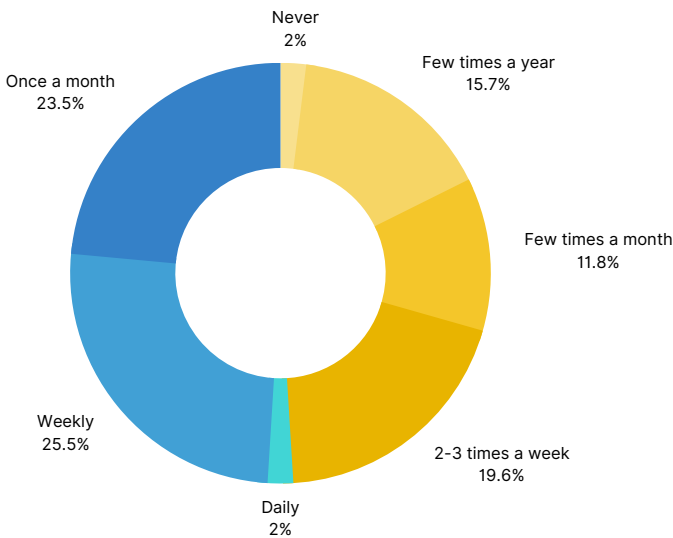
Rental schemes:

- **Bike** (Villo, Blue-Bike, Pro-Velo, Swapfiets, Bolt, Tier, E-bike to go, Cozy wheels)
- **Cargo bike** (Monkey Donkey, Cambio)
- **Car** (Cambio, Cozy Wheels, Wibee, Degage, Greenmobility, MILES, Getaround)
- **Scooter** (Lime, Felyx, Dott, Poppy, Pony, Voi scooters, Bolt, Tier)
- **Shared taxi** (Collecto, With the Taxis Verts)

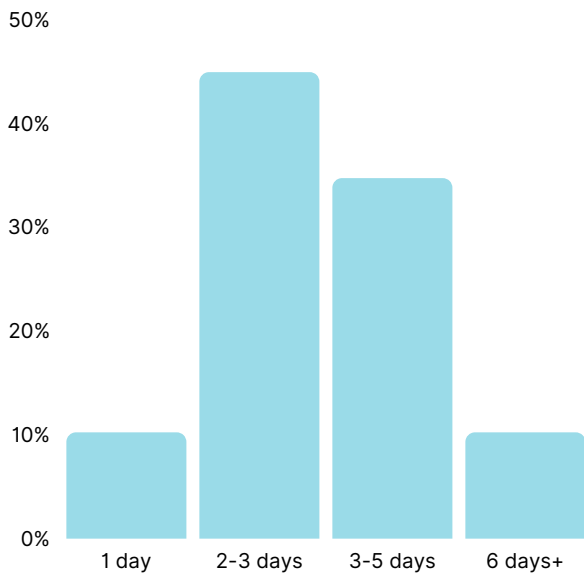
Last-mile deliveries

Delivery use is common, with 25% of respondents making weekly and 23% making monthly orders, driven by time-saving (26%) and convenience (20%). 66% of respondents preferred a longer delivery time if it were cheaper, and 32% if it were more sustainable.

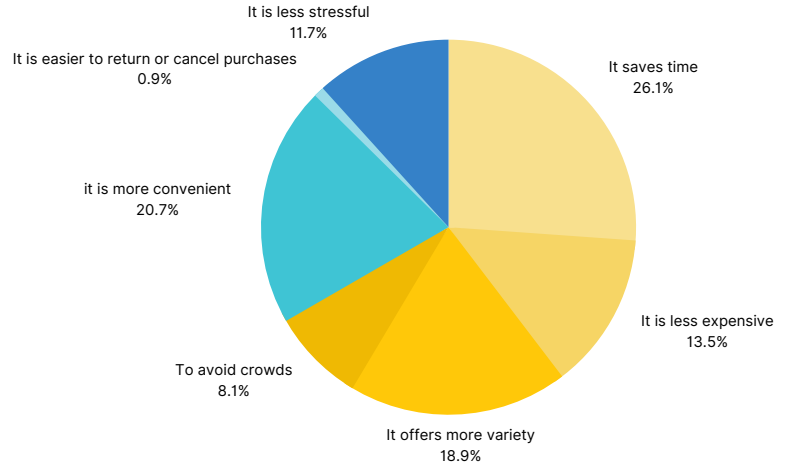
Delivery use



Average delivery time

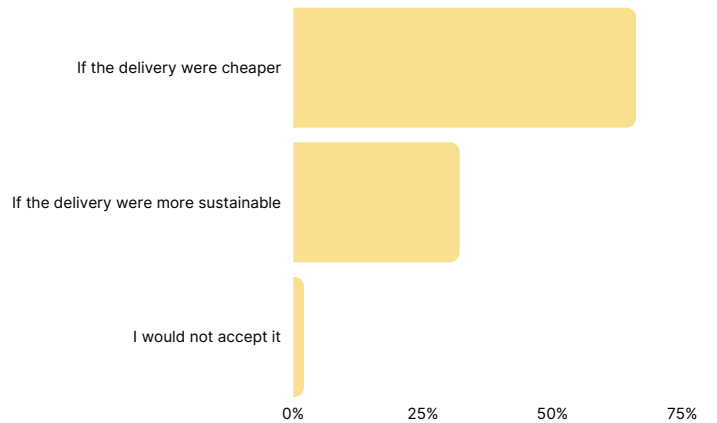


Reasons to order online

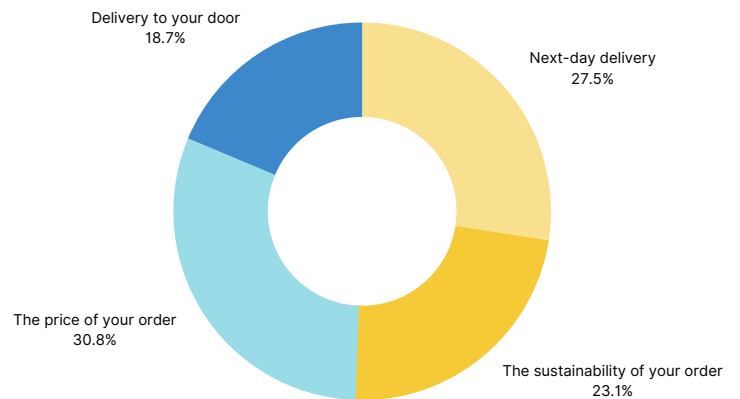


“ Parcel shops are easy because you can collect your order whenever it suits you. ”

Reasons to accept a longer delivery time



Most important order criteria



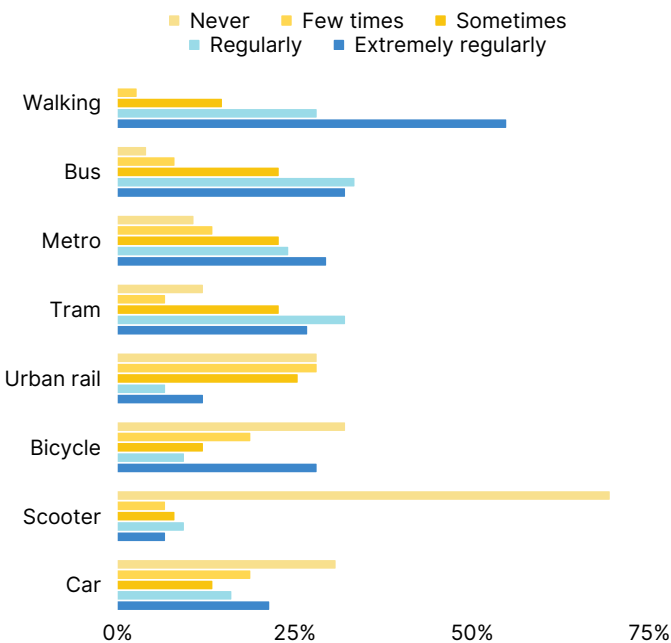
BUDAPEST

Budapest is the capital of Hungary. The city holds a population of 1,729,040 inhabitants and the oldest metro line of continental Europe.

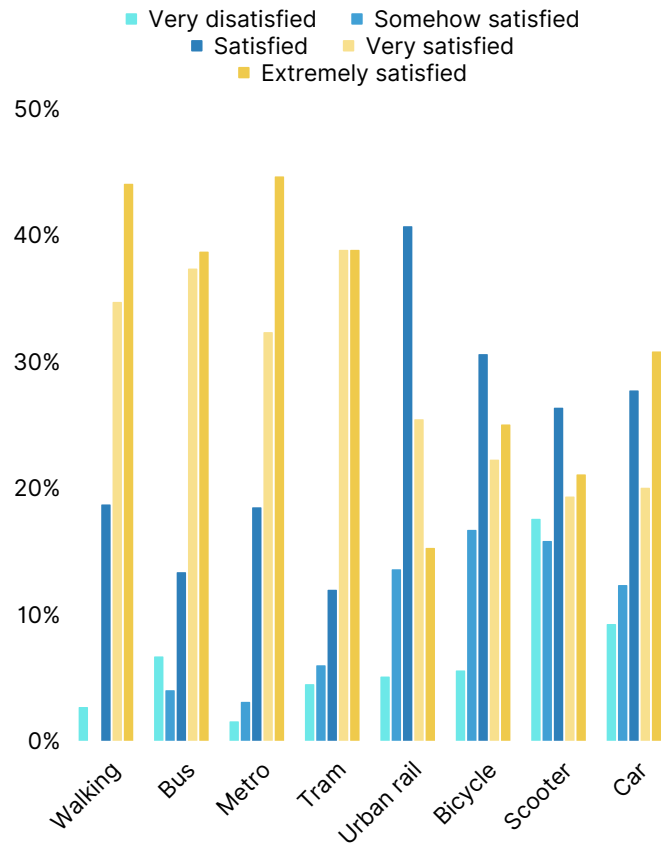
In Budapest, 82% walk regularly, despite mentioning issues with pathways. Over 50% of young people frequently use buses, metros, and trams, which are seen as efficient and environmentally positive, but others point out concerns about comfort, cleanliness, and safety. Cycling has mixed responses, with 37% regular users and 32% never cycling. Infrastructure challenges are highlighted. Car usage is mixed: 30% never use it and 37% use it regularly, reflecting a positive shift away from private vehicles. Scooters are used by 15% regularly, but 69% never use them, indicating limited adoption.

“ All public transport is good in Budapest with good coverage, frequent service and good quality. ”

Regularity of urban mobility modes



Satisfaction with urban mobility



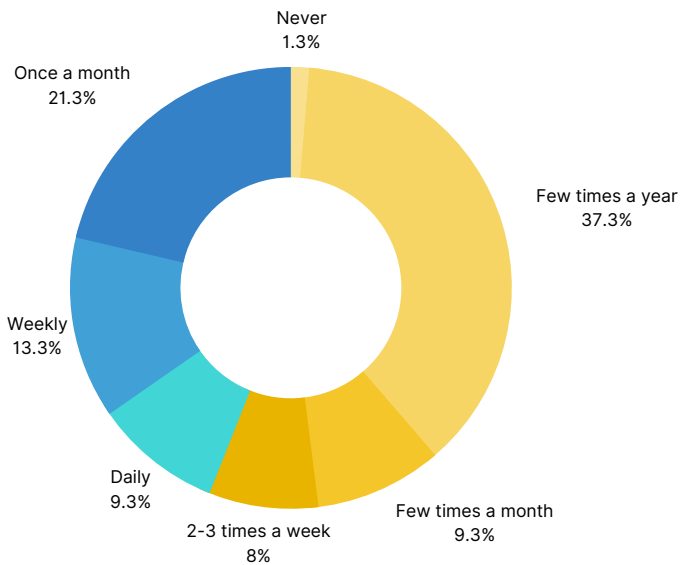
“ Using public transport is a lot more cheaper here than in other similar-sized cities, while the quality exceeds them. ”

Motorised transport was given a priority since the 1960s but cycling numbers are currently increasing.

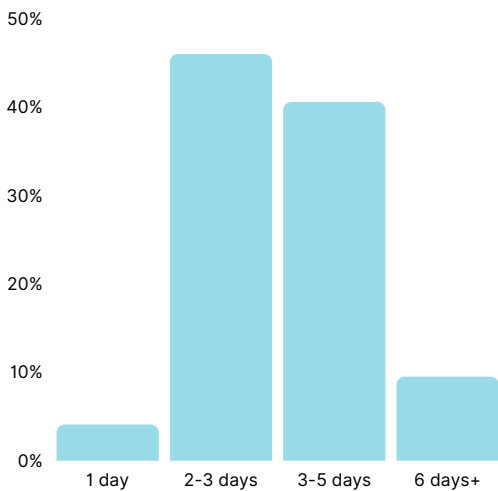
Last-mile deliveries

Online delivery frequency varies, with 37% ordering a few times a year, 21% ordering monthly, 9% daily, and 13% weekly. 29% opt for online shopping to save time, while 47% prioritise price, 26% value doorstep delivery, and 18% value sustainability. About 55% are open to extended delivery times for lower costs and 39% for increased sustainability.

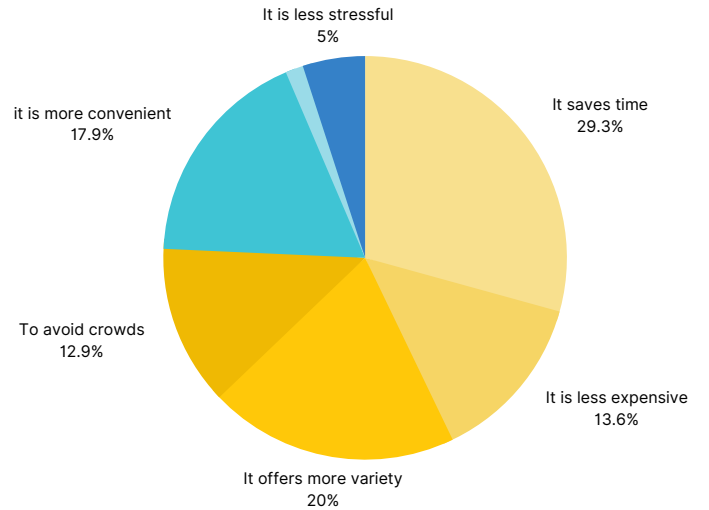
Delivery use



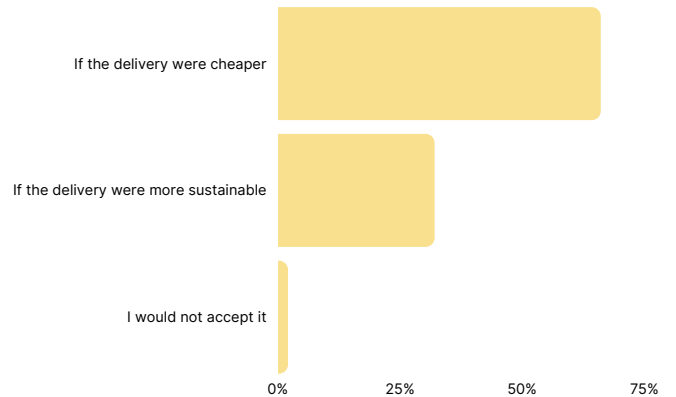
Average delivery time



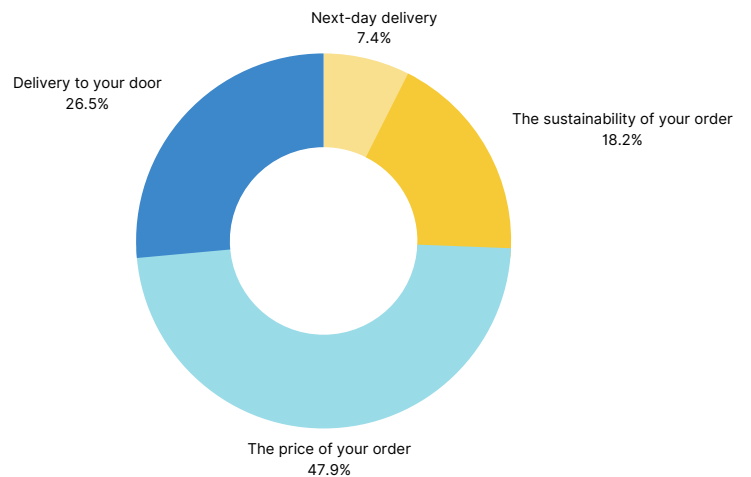
Reasons to order online



Reasons to accept a longer delivery time



Most important order criteria

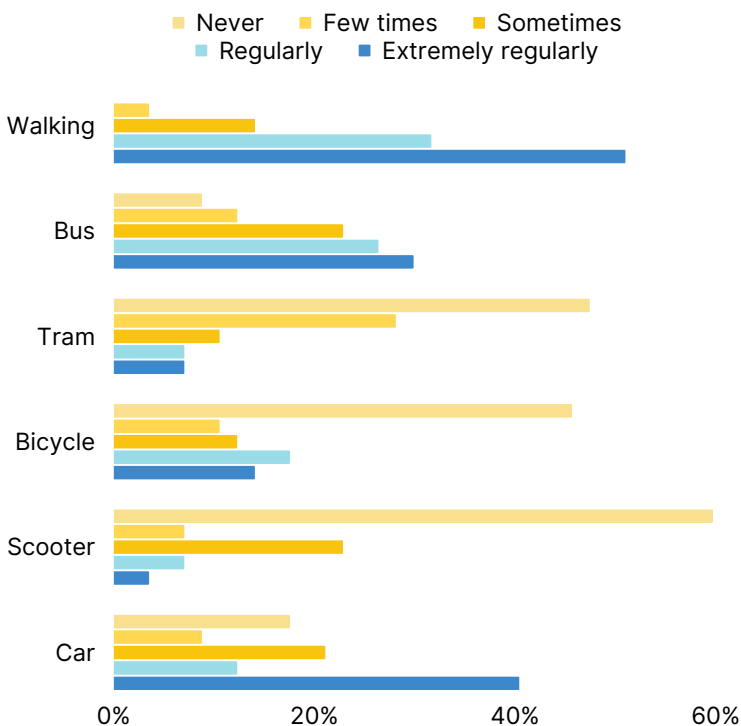


CLUJ-NAPOCA

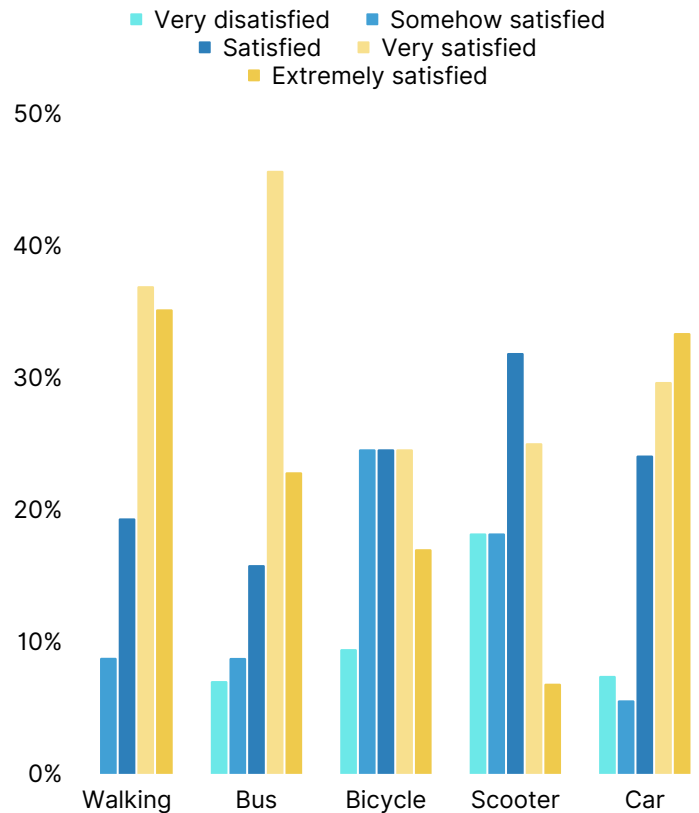
Sometimes named the 'Heart of Transylvania', Cluj-Napoca is the second largest city in Romania with a population of 286,598 inhabitants.

In Cluj, respondents predominantly rely on walking (81%) and driving (52%) as their primary modes of transport. Buses have extensive regular usage among 30% of respondents. While satisfaction exists with walking and bus facilities, dissatisfaction arises from the lack of trains and the absence of a metro. Car dependency and traffic-related issues, including noise and pollution, are highlighted. Bicycle usage is limited, with 18% using it regularly and 46% never using it, possibly due to safety concerns related to inadequate infrastructure and hazardous road conditions.

Regularity of urban mobility modes



Satisfaction with urban mobility



" You have the possibility to go anywhere in the city by public transportation. "

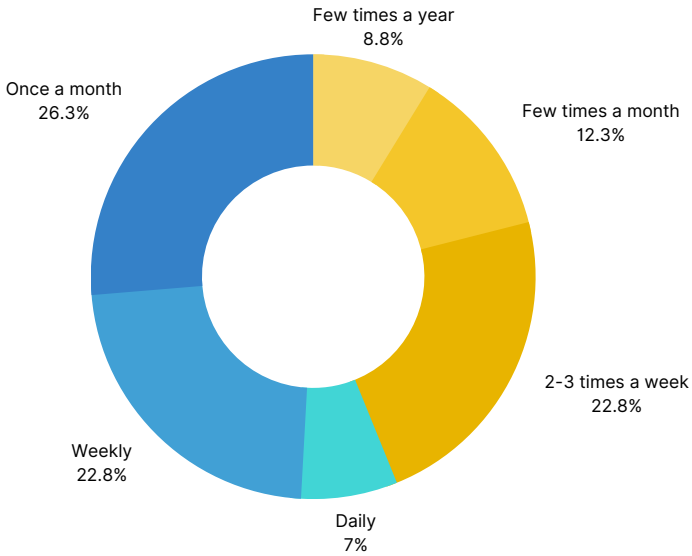
Rental Schemes:

- **Bicycle** (Clujbike)
- **Scooters** (Lime, Bolt etc.)

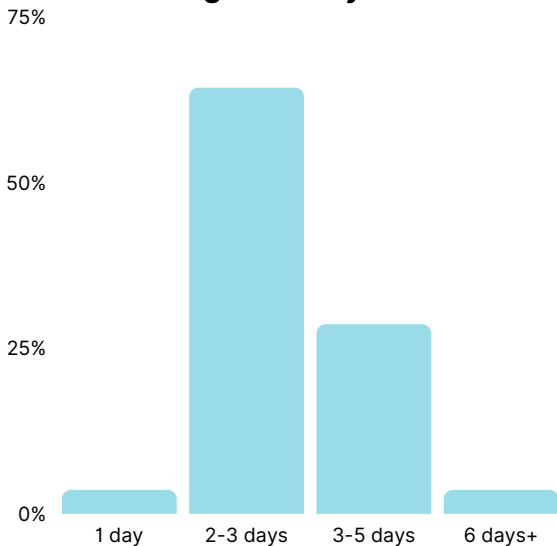
Last-mile deliveries

Young people frequently opt for delivery services, with 72% utilising them from monthly to 2-3 times weekly. Time efficiency is the key driver, as is the price. If delivery is cheaper, longer delivery is acceptable to 63%, while 35% would accept longer delivery if it were more sustainable.

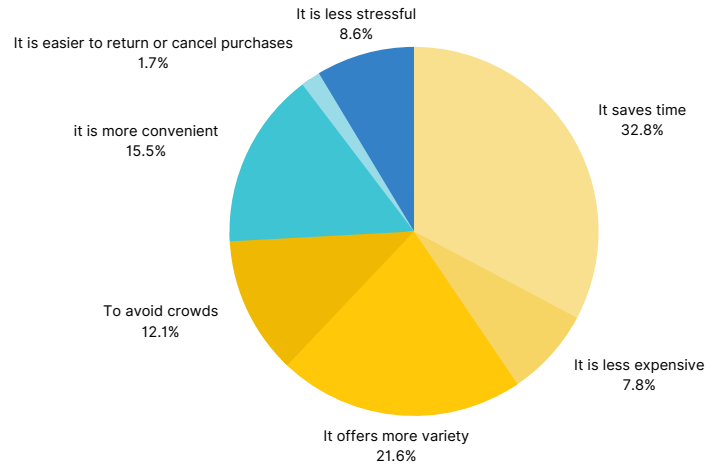
Delivery use



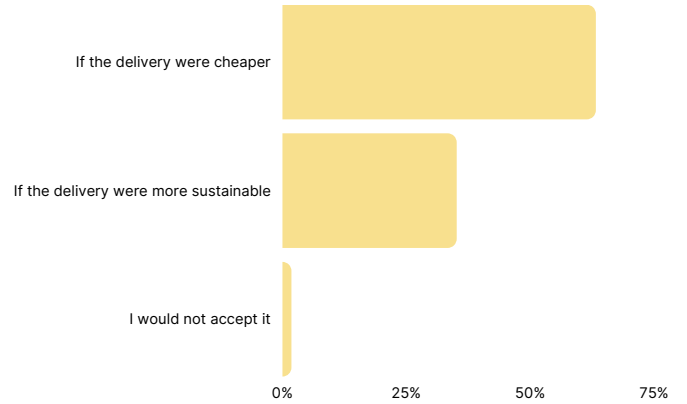
Average delivery time



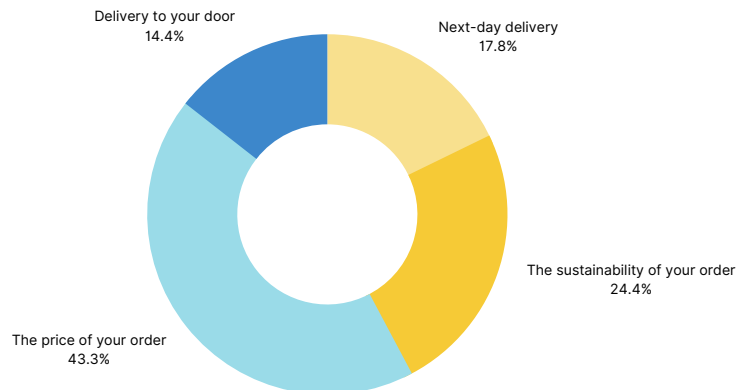
Reasons to order online



Reasons to accept a longer delivery time



Most important order criteria

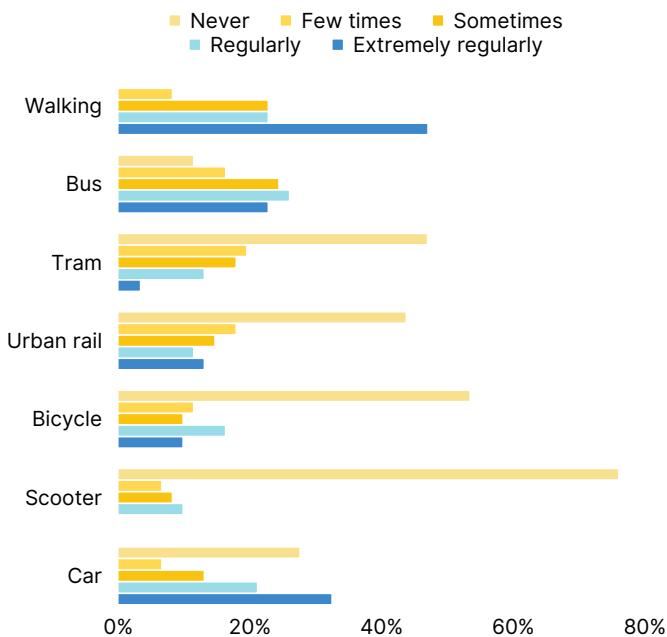


DUBLIN

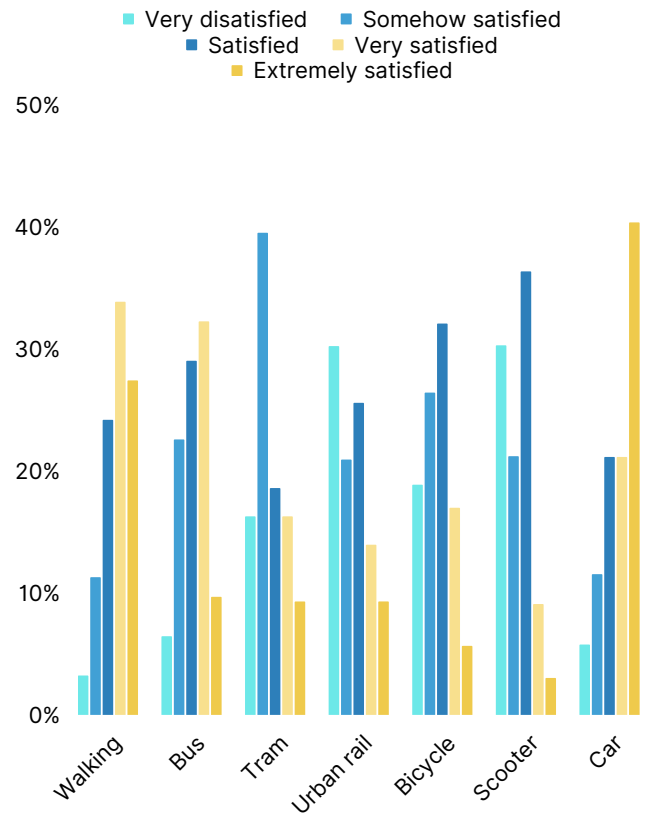
The population of the Irish capital, currently estimated at 1,263,219 inhabitants, notably grows thanks to the European headquarters of major tech companies located there.

In Dublin, walking is the preferred mode, with 68% walking regularly. Buses are popular, being used regularly by 47%, yet 11% abstain. 23% are regular tram users, but 46% never use it, which might be due to limited tram lines, unreliability, and issues with safety (based on criticism). Positive remarks in regards to public transport note improved accessibility and reliable intercity rail services, but negativity concerns reliability, interconnectivity, and inadequate night services. Car reliance is evident, as 52% drive regularly due to its convenience, while 27% never drive, indicating the need for alternative options. Cycling is less popular, with 53% never cycling, but 25% are regular cyclists. Concerns are raised about unsafe infrastructure and a lack of dedicated lanes. Scooter use is minimal, with 75% never using them.

Regularity of urban mobility modes



Satisfaction with urban mobility



“**Dublin is an easy city to traverse on foot and more infrastructure for cycling is being introduced.**”

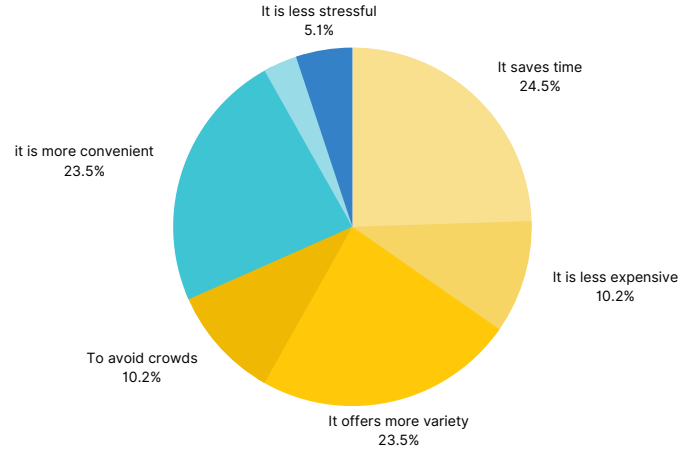
Rental Schemes:

- **Bicycles** (Dublinbikes, Moby)
- **Cargo bikes** (Bleeper, Moby)
- **Car share** (Toyota Yuko, Go Car)
- **Scooters** (Lifty)

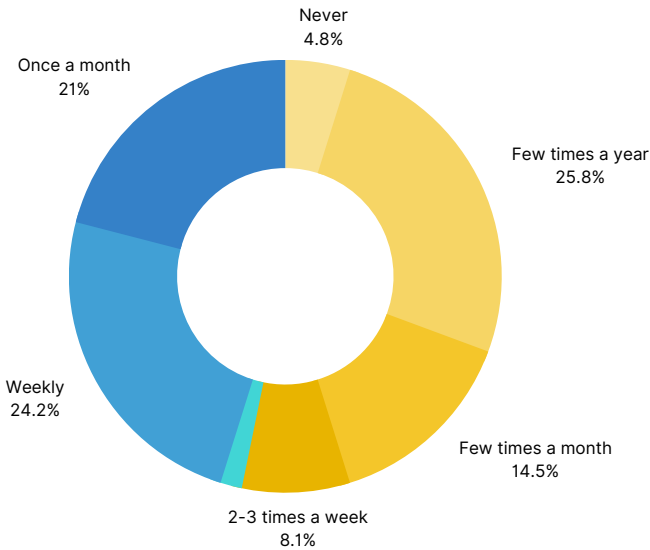
Last-mile deliveries

Online ordering frequency varies. While 24% order weekly, 25% do so a few times a year, and 20% do so monthly. Leading reasons include time-saving (24%), convenience (23%), and variety (23%). If cheaper, 64% accept extended delivery times, aligning with 56% prioritising price. 25% would accept longer deliveries if they were more sustainable.

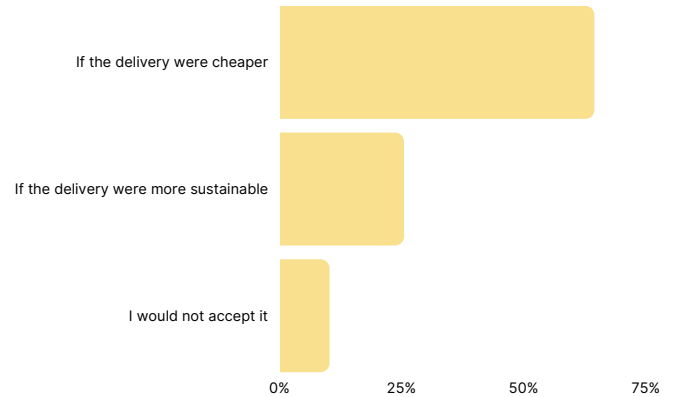
Reasons to order online



Delivery use

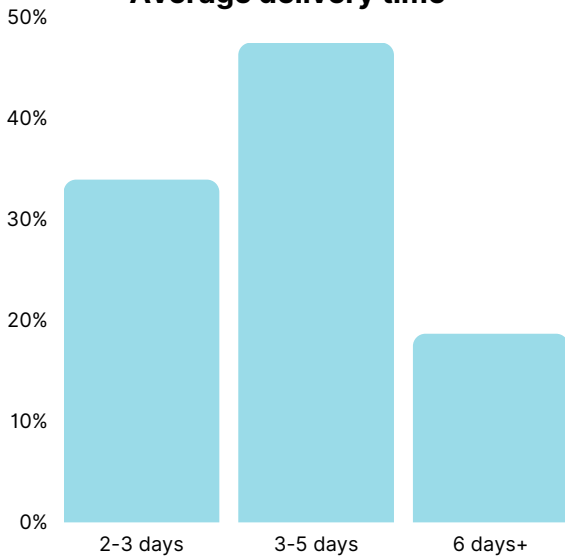


Reasons to accept a longer delivery time

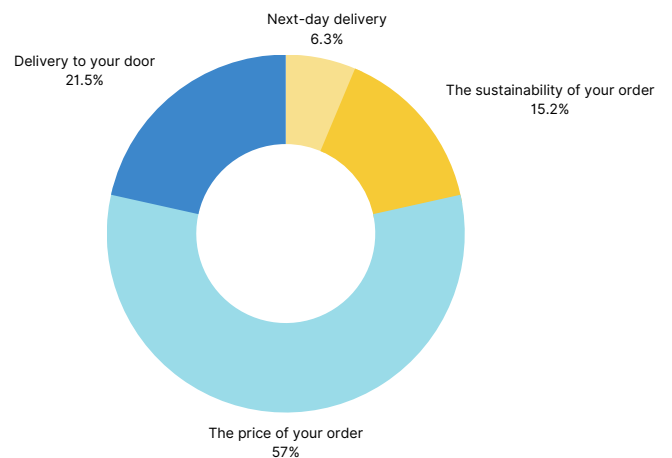


“ I am all for collection points if it means delivery is cheaper. However, sometimes the depot for collection has poor opening hours which can be a nuisance. ”

Average delivery time



Most important order criteria

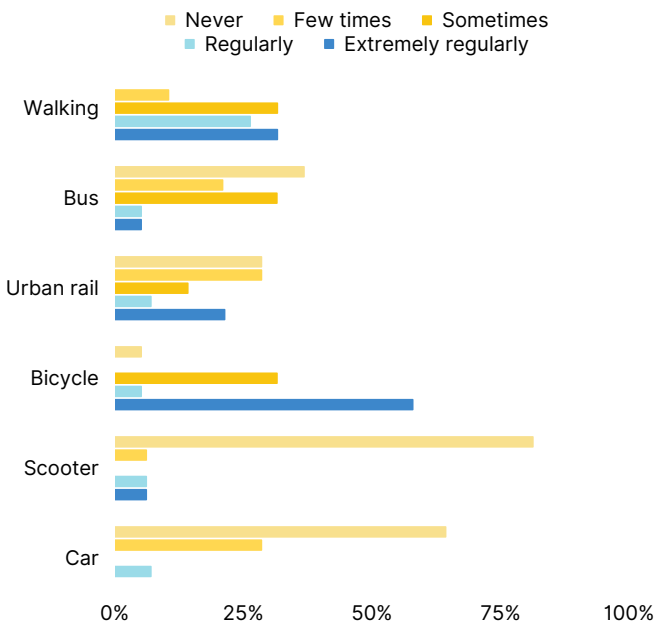


GRONINGEN

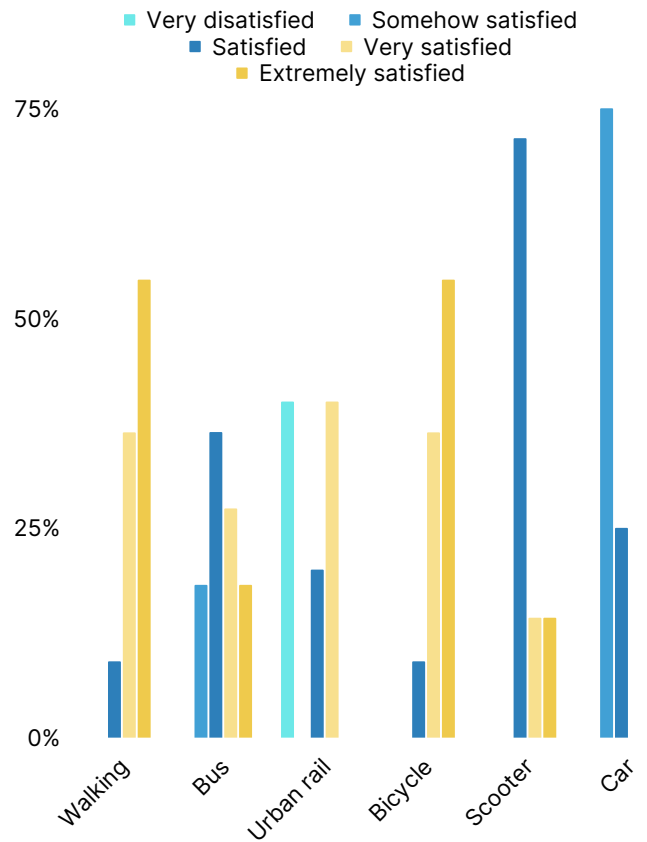
Groningen is a particularly attractive student city in the Netherlands. About a quarter of its 230,000 population consists of students and its Kei-Week is the largest new students introduction week in Europe.

In Groningen, there is a strong affinity for cycling, as 57% cycle extensively and 35% cycle occasionally, contributing to a cityscape that prioritises bicycles (with 90% being satisfied with the cycling in the city). Walking is also common, engaging 57% of respondents regularly. Urban rail garners popularity, with 21% using it extensively. Conversely, bus usage is less frequent, as 37% never use it and only 10% do so regularly. Car usage remains modest (64% never drive, while only 7% drive regularly), showcasing the city's success in promoting eco-friendly alternatives. Scooter use is infrequent (81% never use it). Favourable comments highlight seamless cycling, well-developed bike lanes, and pedestrian-centric infrastructure. Negative feedback highlights issues like unclear pedestrian setups, limited nighttime public transport, and parking-related challenges.

Regularity of urban mobility modes



Satisfaction with urban mobility



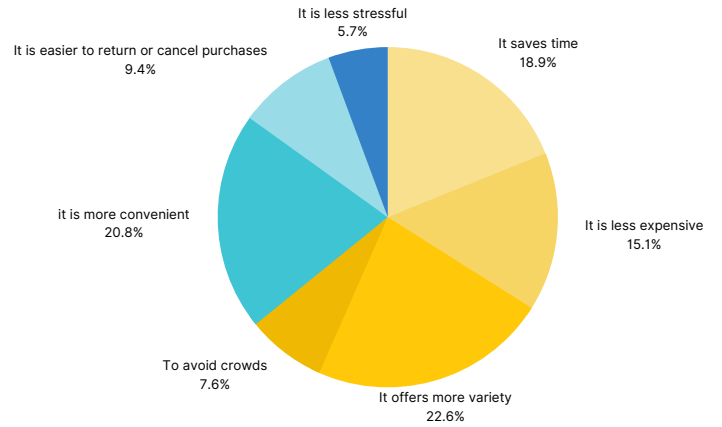
"I love how bikable and walkable the city is. Everything is nearby, making mobility even easier."

Bicycles account for at least **60% of all mobility movements** in Groningen. There is no other place in the world where so many people are cycling.

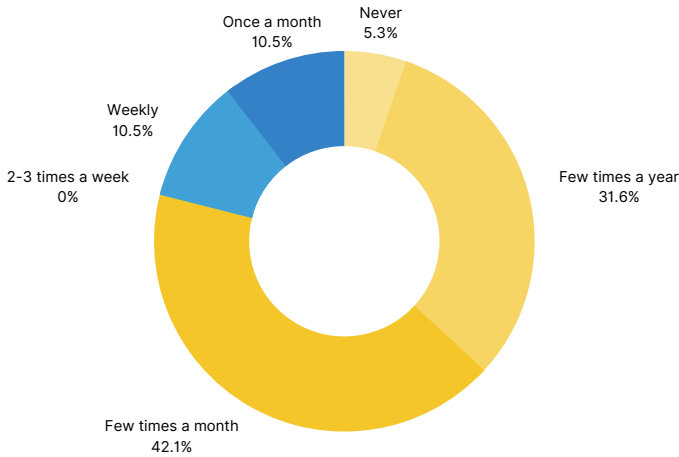
Last-mile deliveries

Online delivery services are used by 42% a few times a month, while 31% use them only a few times a year. Diverse options (22%) and convenience (20%) drive usage, with 46% valuing price and 28% sustainability. In contrast to the other cities, in Groningen, longer delivery times would be accepted if they were sustainable for 50% of respondents, followed by cheaper goods (44%).

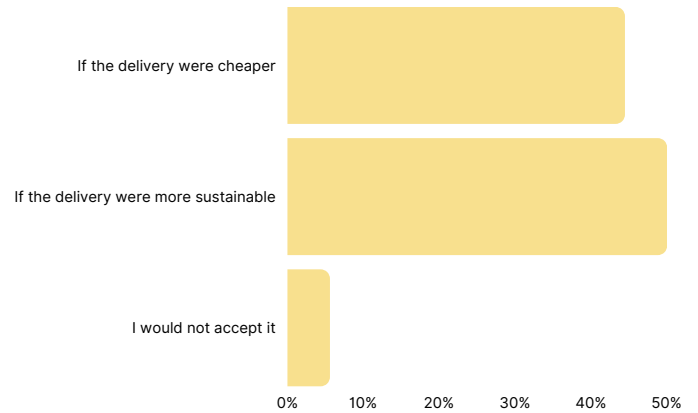
Reasons to order online



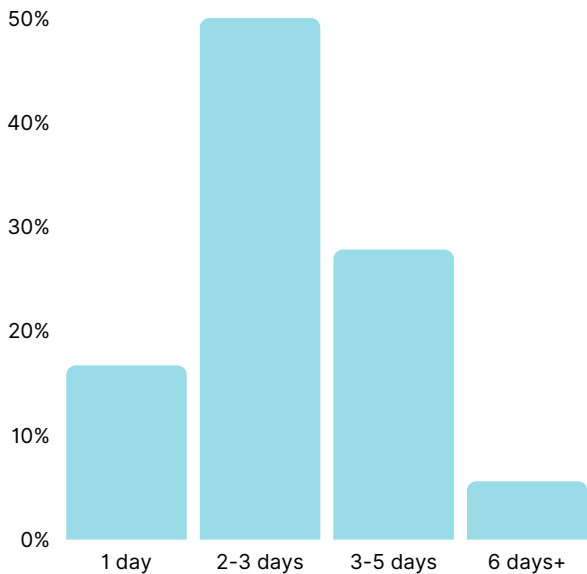
Delivery use



Reasons to accept a longer delivery time

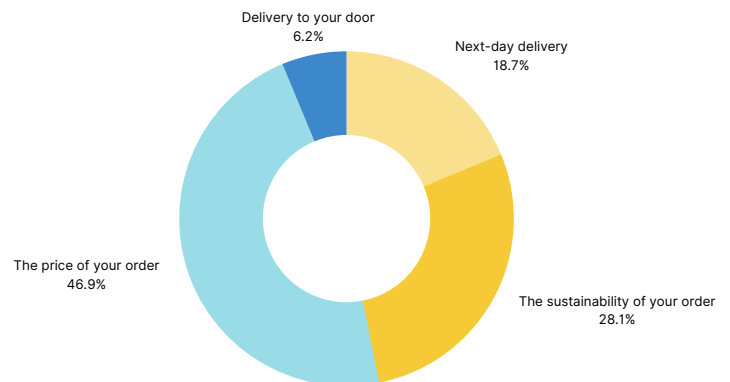


Average delivery time



" I usually use a collection point, there are plenty around, so I don't have to wait for the delivery. "

Most important order criteria

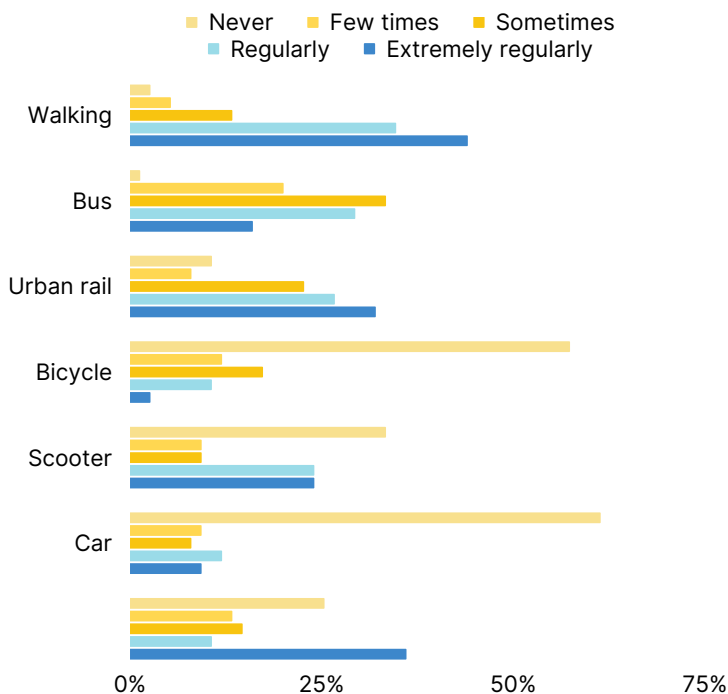


KRAKOW

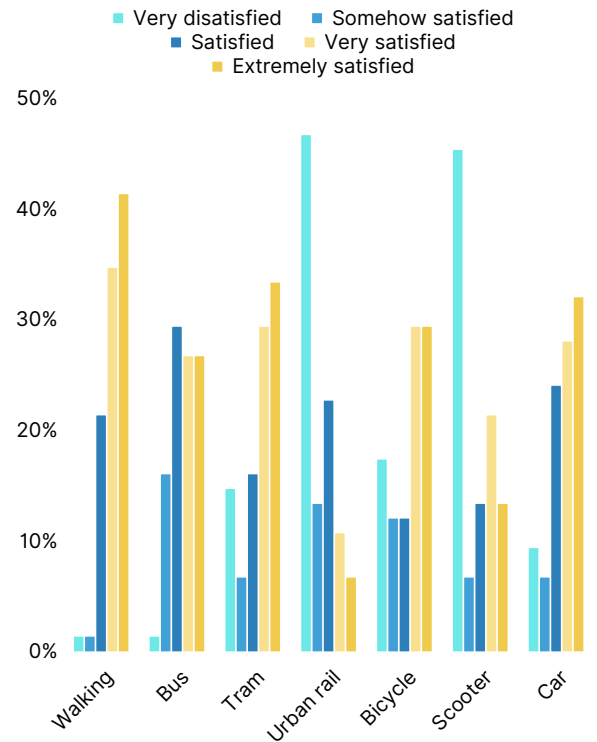
Krakow is one of the major cities in Poland with a population of 800,653 inhabitants. Its Old Town was the first area declared as a UNESCO World Heritage Site in 1978

Krakow's preferred transportation mode is walking (78% regular users), followed by trams (58% regular users) and buses (45% regular users). Satisfaction with tram and bus availability contrasts with frustration over their unreliability and lack of frequency. Urban rail is used less (12% regular, 57% never), while cycling is balanced (48% regular, 33% never). Car usage is divided, with 46% regular and 25% never users. Scooter usage is limited (61% never, 21% regular). This mix reflects a varied mobility landscape with potential for promoting sustainable options while addressing issues of reliability.

Regularity of urban mobility modes



Satisfaction with urban mobility



There are great tram connections, I usually only need to get one or maximum two trams to get to my destination, even if it is in completely different part of the city. Tram stops are close to most interesting places in Krakow.



Rental Schemes:

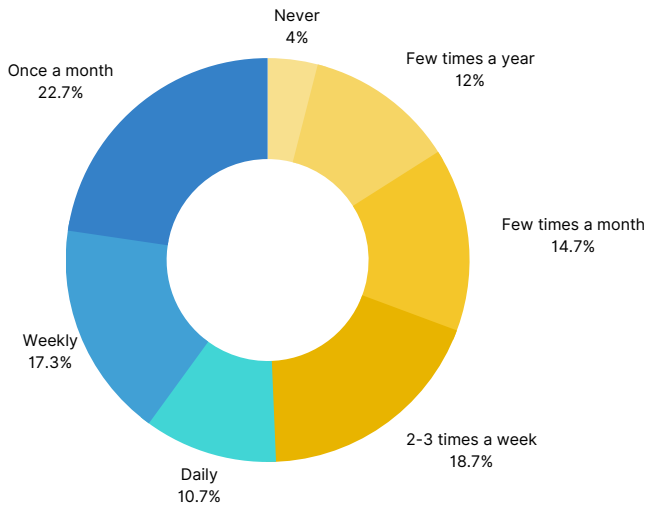
- Bikes
- E-bikes at P+R stations
- Car (Traficar)
- Scooters (Bolt)



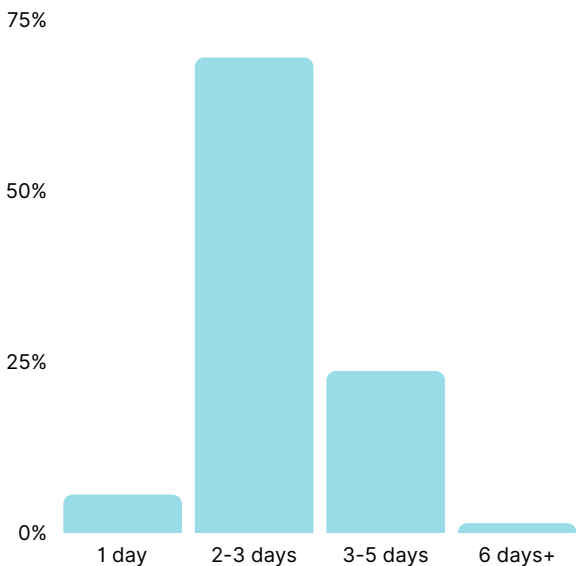
Last-mile deliveries

In Krakow, online delivery is common with weekly orders (17%) or 2-3 times a week (18%). Occasional orders are made a few times a month (14%) or monthly (22%), while daily (10%) and yearly (12%) orders exist to a lesser extent. The most common reasons for ordering are time-saving (29%) and cost (17%). 80% would accept extended delivery for cost savings, while only 18% would for sustainability.

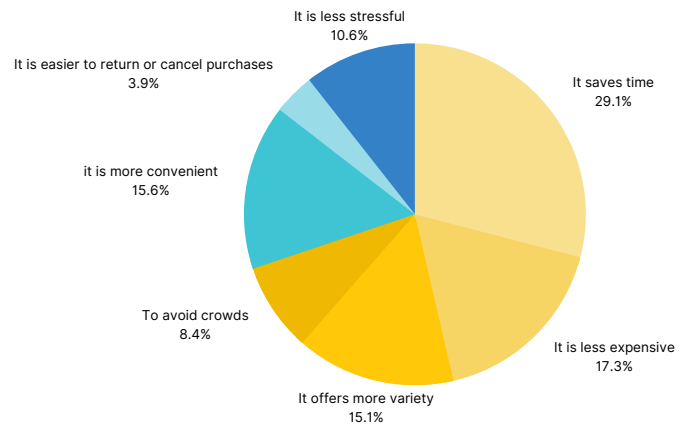
Delivery use



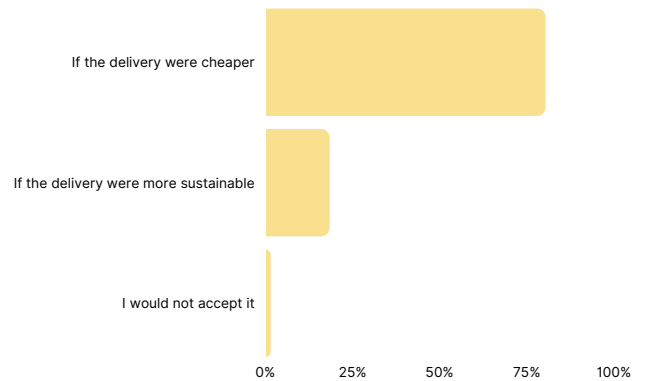
Average delivery time



Reasons to order online

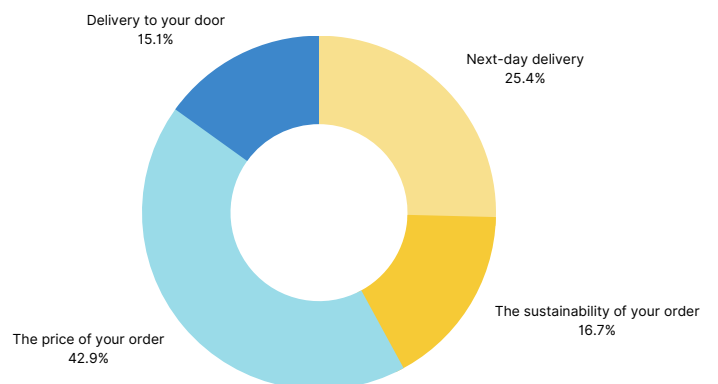


Reasons to accept a longer delivery time



“ I do not use deliveries to my door, only parcel lockers, which are really popular in Poland. It is more sustainable and I can collect my parcel when I have time. ”

Most important order criteria

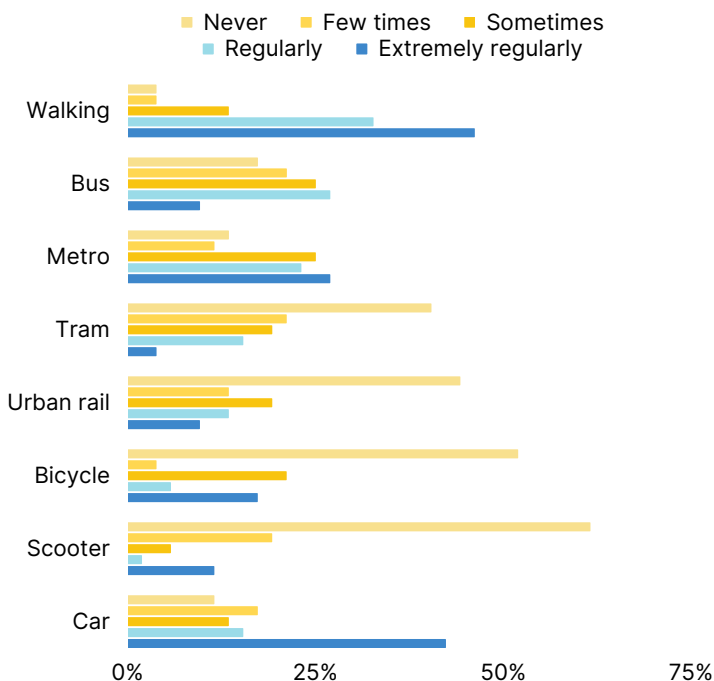


LISBON

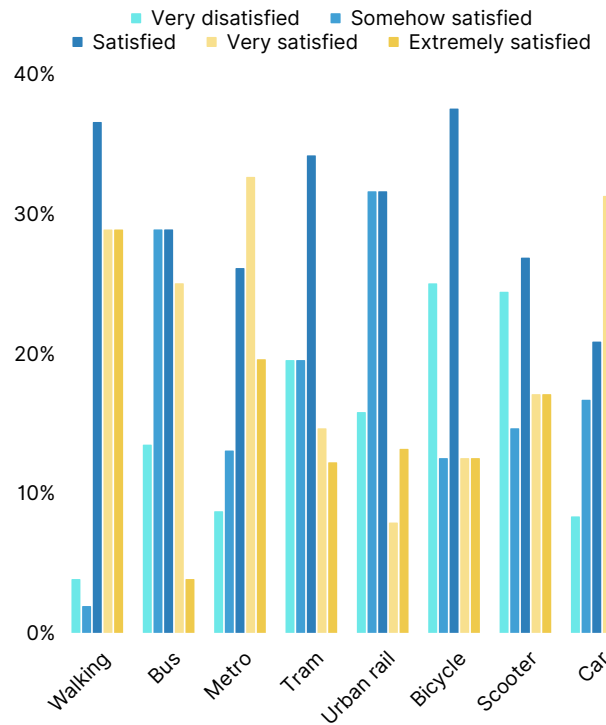
The east and west of Lisbon are linked by the Vasco da Gama bridge, the largest bridge in the European Union. There are 545,796 inhabitants in the Portuguese capital.

Lisbon's young people favour walking (78% regular users) and the metro (49% regular users). Buses see 35% regular use but 17% never use them, suggesting room for improvement. Feedback on public transport is mixed, praising options and environmental aspects but noting reliability, infrastructure, traffic congestion, and coverage issues. Bicycle and scooter use is limited, with 51% never cycling and 61% never using scooters, signifying scope for improved biking and micro mobility infrastructure. However, there is a significant portion of 22% that cycles regularly. Regular car use is at 57%, despite 11% never using cars, signalling a need to address car reliance.

Regularity of urban mobility modes



Satisfaction with urban mobility



“ I enjoy the bike lanes that appeared in the last few years. I also have many buses and a subway next to my home that have good connections. However, they could be more regular. ”

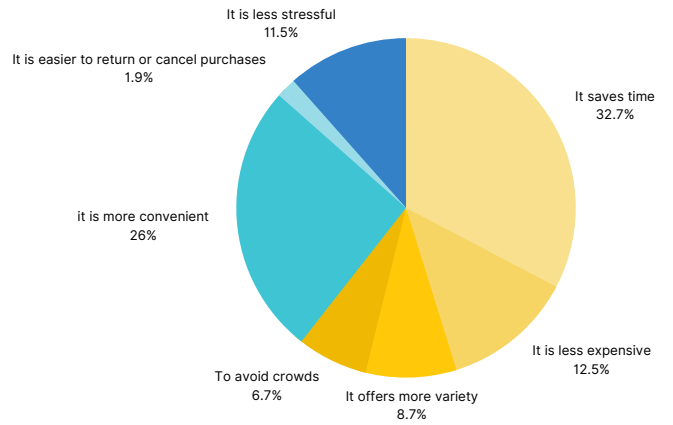
Rental Schemes:

- **Bike** (Gira)
- **Car** (Driiveme)
- **Scooter** (Lime, Hive, Voi, Freenow, Bird, Frog Scooters)

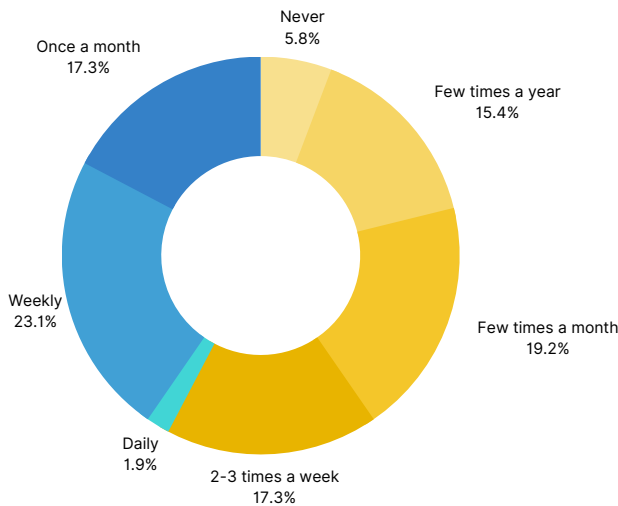
Last-mile deliveries

Online delivery is used by 23% weekly, 19% a few times a month, and 17% two to three times a week, driven by time-saving (32%), convenience (25%). A significant proportion (59%) would opt for longer delivery times for cost-effectiveness, while 30% would do so for sustainability. This inclination towards the price factor is echoed in the most crucial factor for delivery, which is the order's price (44%), followed by doorstep delivery (23%).

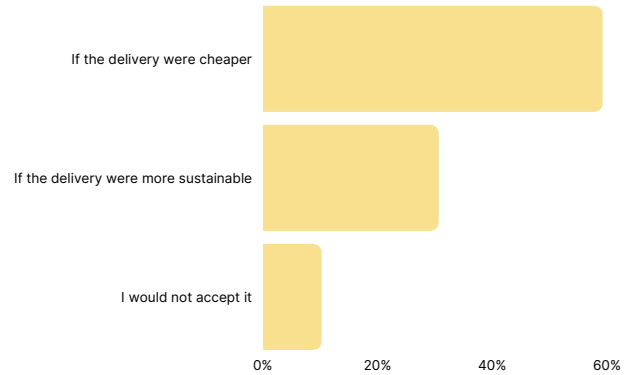
Reasons to order online



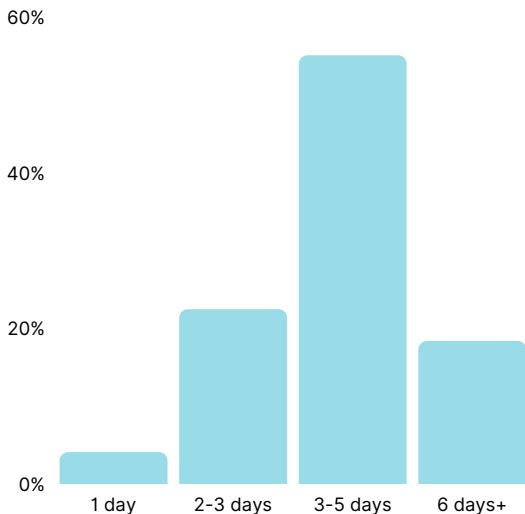
Delivery use



Reasons to accept a longer delivery time

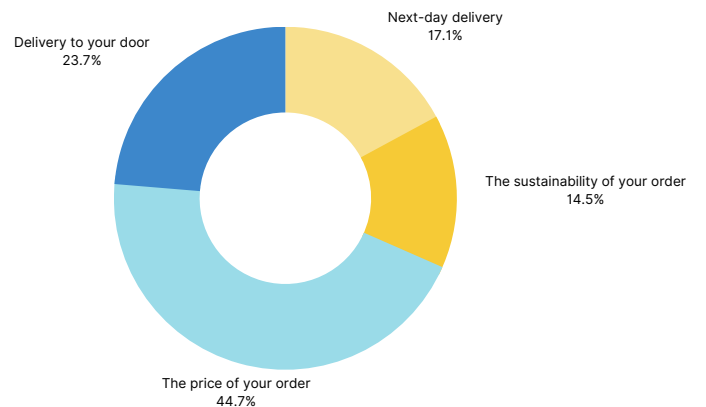


Average delivery time



" I make my groceries online to avoid crowds and to save money as it is easier to compare prices and not buy impulsively. "

Most important order criteria

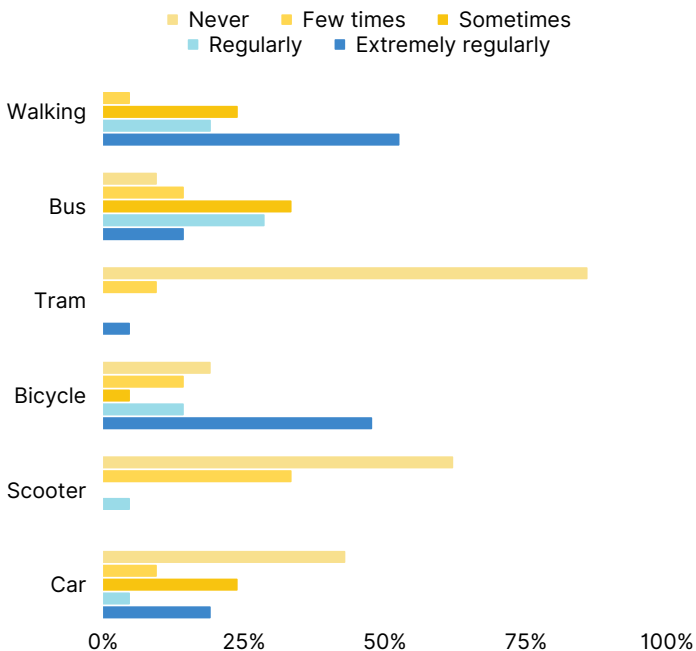


LUND

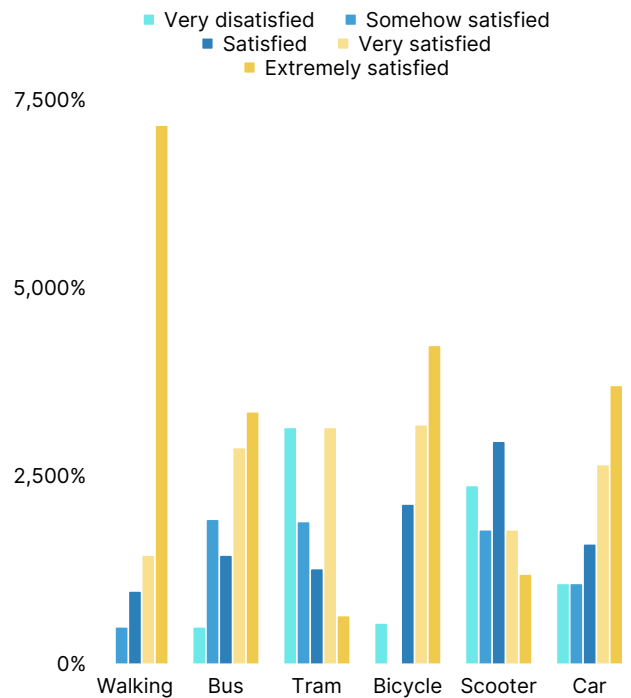
Lund is a Swedish city with 91,940 inhabitants particularly renowned for its 12th century cathedral and the scientific innovations from its university.

In Lund, 71% prefer walking, while cycling is notably popular (47% regular users), indicating that it is a transport habit among young people in Lund. Some (19%) never cycle. The cycling infrastructure is praised, but cobblestone roads pose challenges. Bus use is balanced between occasional (33%), regular (28%), and extremely regular use (14%), with only 9% never using it. Buses are perceived as reliable, though complaints arise about nighttime services and limited routes. Trams are unpopular (81% never use them), with critics underscoring the need for longer tram hours and better reliability, possibly contributing to their infrequent use. Car use varies: 42% never use it, 23% use it occasionally, and 19% use it regularly, indicating a balanced reliance on cars. Scooter usage is limited (61% never, 33% occasional, 4% regular).

Regularity of urban mobility modes



Satisfaction with urban mobility



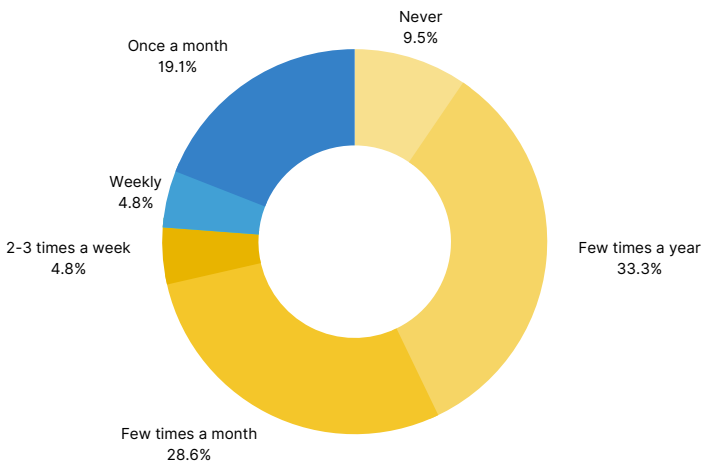
"The public transport system is good, although there is always room for improvement. I wish the tram ran later into the night for example."

Citizens can take part and influence matters relating to cycling in the municipality thanks to Lund's Bicycle Panel.

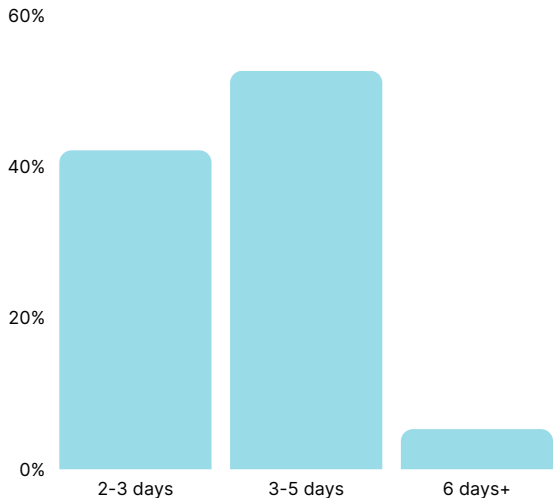
Last-mile deliveries

9% never do online shopping, while most use it occasionally (33% a few times a year and 28% monthly). Weekly and daily use is limited, indicating varied reliance on online shopping. The top reasons are variety (27%) and time-saving (22%). Price matters most to 53%, followed by sustainability (18%) and proximity (18%). If cheaper, 70% accept delayed delivery, and 17% prioritise sustainability, which underscores the significance of cost considerations.

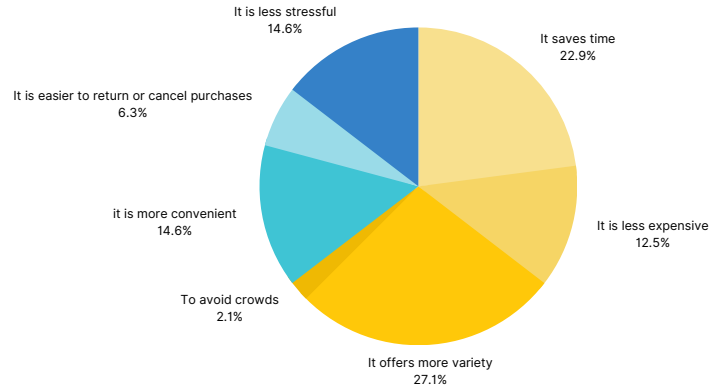
Delivery use



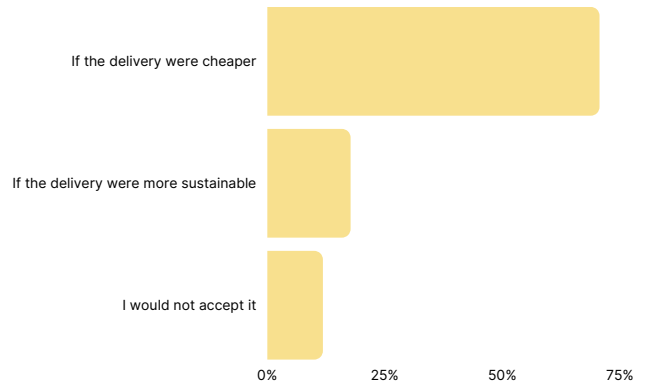
Average delivery time



Reasons to order online

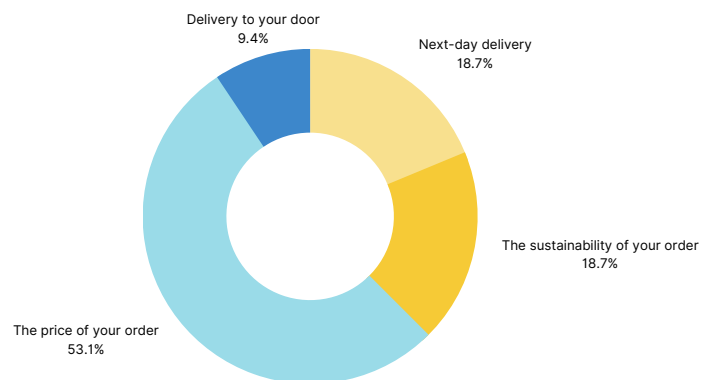


Reasons to accept a longer delivery time



“ Delivery vehicles need to be electrified, to save our environment and our health as well as reducing noise. ”

Most important order criteria

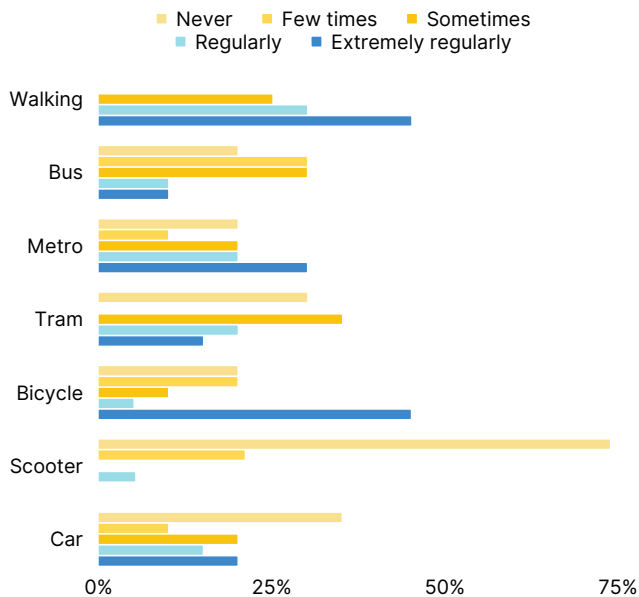


LYON

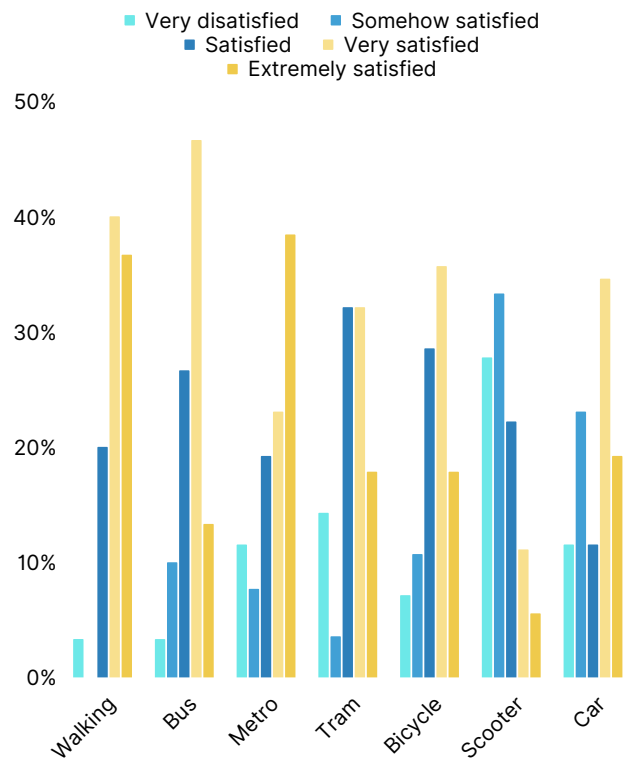
Lyon is located in France and holds a population of 522, 228 inhabitants. Interestingly, the city has been the birthplace of the funiculars and the bateau-mouche during the 19th century.

Walking and cycling stand out as preferred modes, with 75% walking and 50% cycling regularly, highlighting the city's pedestrian-friendly environment and cycling habits. However, 20% never cycle. The metro is the most used public transport mode, with 50% regular and 20% occasional users. Other modes vary: buses have 30% occasional, 30% infrequent, and 20% regular use. Tram usage is similar. Urban rail sees 42% never and 21% regular usage. Views on public transport differ, with convenience and comfort contrasted by concerns over delays, unreliable schedules, and crowding. Car usage is moderate (40% regular and 35% never). Negative feedback addresses traffic and environmental impacts and advocates for greener urban planning. Walking and cycling draw praise, but there are issues like dangerous roads and poor paths in suburban areas. Scooter use is limited (73% never, and a mere 5% regular use).

Regularity of urban mobility modes



Satisfaction with urban mobility



“The bus network is quite dense and frequent but the scheduled timetables are not respected, which makes it hard to plan ahead.”

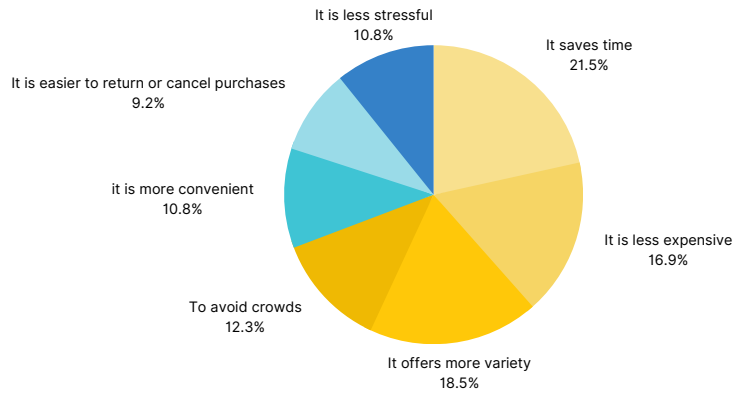
Rental Schemes:

- Bikes (Vélo'v)
- Cargobikes (cargoVélov)
- Electric cars (Zity)
- Scooters (Dott, TIER)

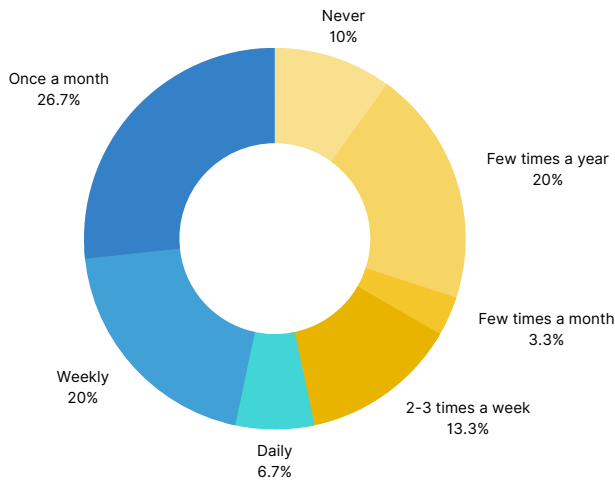
Last-mile deliveries

Online delivery is prevalent among young people, with 20% using it weekly and 26% monthly. However, 20% use it only a few times a year, which suggests that for some it is not a regular practise but rather used for specific occasions. Time-saving (21%) and variety (18%) are the top reasons. Price matters to 32%, sustainability to 30%. If it were cheaper, 57% would accept longer delivery, while 34% would accept longer delivery if it were more sustainable.

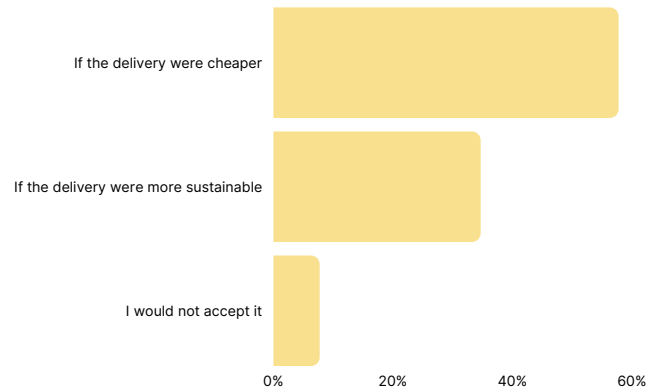
Reasons to order online



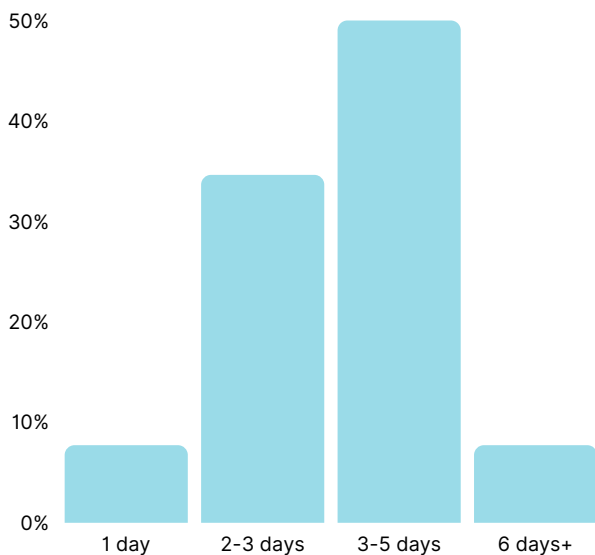
Delivery use



Reasons to accept a longer delivery time

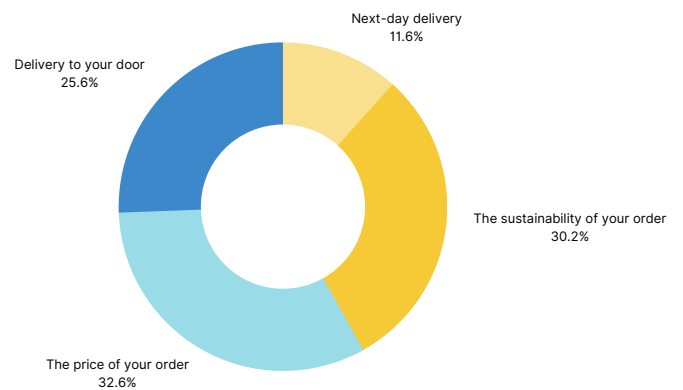


Average delivery time



“ I would like less outsourcing for deliveries. ”

Most important order criteria

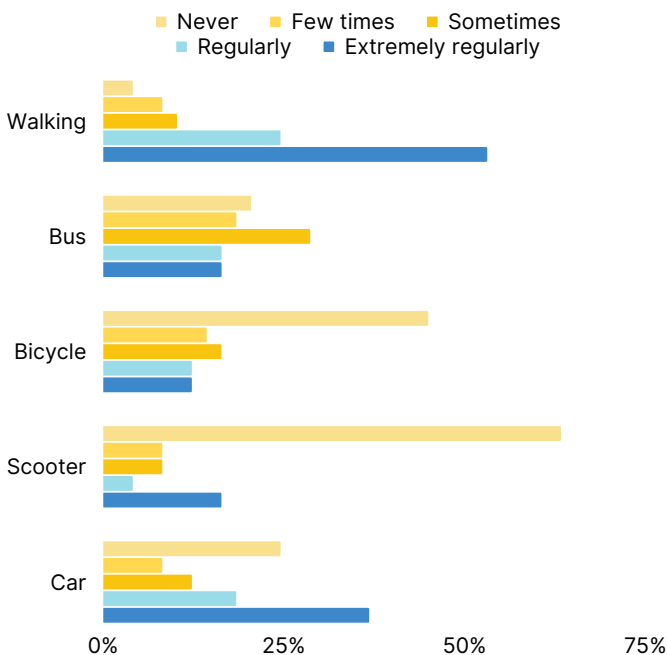


THESSALONIKI

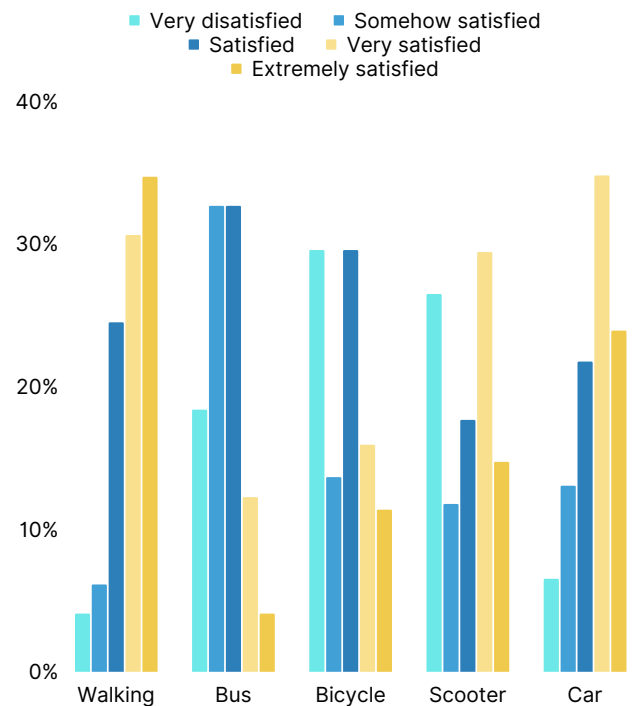
With its 814,524 inhabitants, Thessaloniki is the second largest city in Greece. The rich history of the town and its numerous cultural events make it particularly popular.

In Thessaloniki, walking is the preferred mobility choice for young people (77% regular walkers), with buses used regularly by 32%, though efforts are needed to address the 20% who never use buses. Dissatisfaction with the bus network's reach and unreliability is notable. Many respondents outlined their dissatisfaction with the slowness of building the metro. Car usage is relatively high (53% regular, 24% never), indicating both car reliance and openness to alternatives. Cycling is not that popular for most young people, with 45% never cycling, but with a notable portion of 20% cycling regularly, with satisfaction (56%) and dissatisfaction (44%), based on safety concerns and a lack of bike lanes. Scooter use is limited (20% regular, 63% never), reflecting mixed adoption.

Regularity of urban mobility modes



Satisfaction with urban mobility



“ **The metro has been under construction for 17 years and public transport is limited to buses.** ”

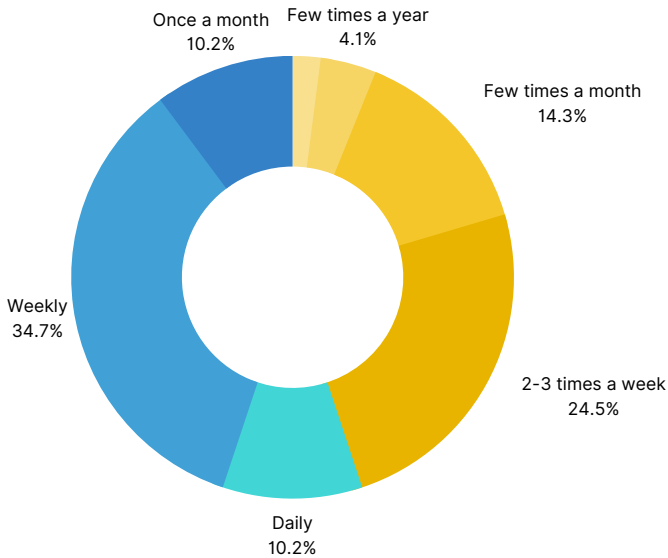
The Intelligent Urban Mobility

Management System of Thessaloniki aims to help citizens move more easily by avoiding congested traffic areas, and to raise environmental awareness and strengthen the use of public transport.

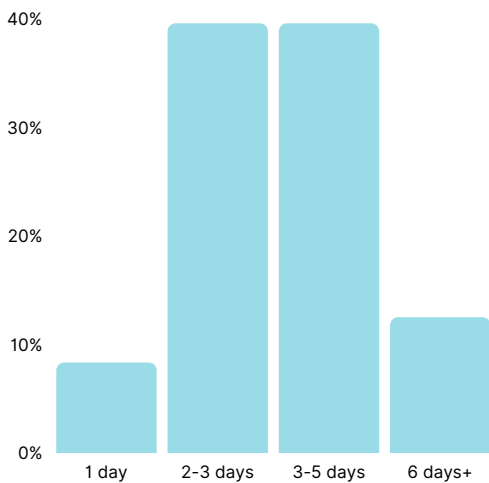
Last-mile deliveries

Delivery use seems to be quite common, with 34% using it weekly, 10% daily, and 24% two to three times a week. Most (49%) choose online delivery to save time. 79% would accept longer delivery times if it were cheaper, and only 10% would accept it if it were more sustainable. For 72%, the price of the order is most important, while only 8% care whether it is sustainable or not.

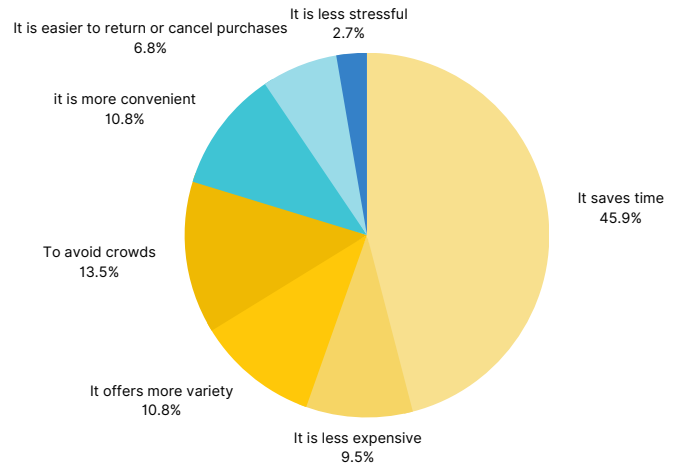
Delivery use



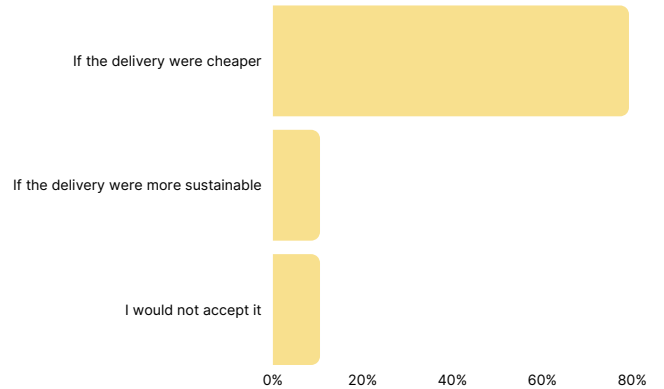
Average delivery time



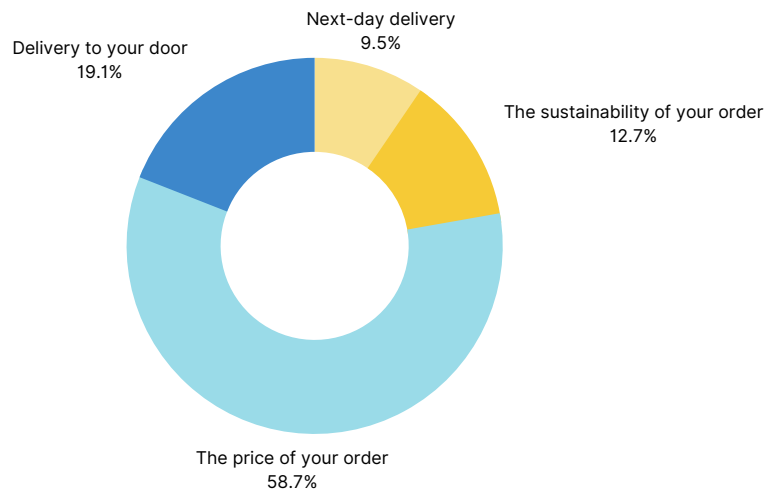
Reasons to order online



Reasons to accept a longer delivery time



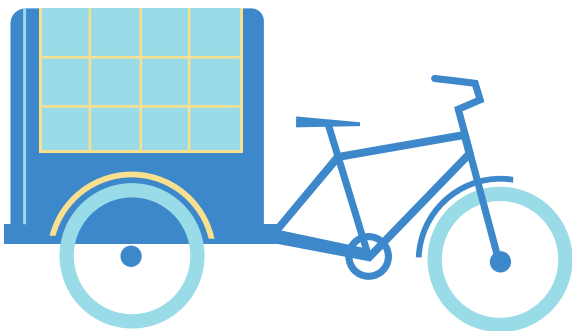
Most important order criteria



Key findings

Walking

Walking is the most preferred mode of transport in most cities among young people (for example, 75% walk regularly in Brussels, 81% in Cluj-Napoca, and 77% in Thessaloniki). The cities with the least regular walking are Groningen with 57% and Dublin with 68% regularity. The strong tendency for walking highlights the importance of pedestrian-friendly urban environments and infrastructure, making it important to invest in well-maintained sidewalks, pedestrian crossings, and safe walking zones to encourage people to choose walking



Cycling

In almost all cities, **there is a large gap between young people who cycle regularly and those who never cycle**. This reflects the diverse range of factors that influence urban mobility choices among young people. It becomes evident that the decision to cycle regularly or abstain from **cycling is shaped by multifaceted considerations that pertain to local infrastructure, safety perceptions, and overall city planning**. In many cities, respondents were concerned about the lack of safety (Thessaloniki, Brussels, Cluj, Dublin). The cities of Krakow and Budapest, among others, were worried about deficient cycling infrastructure.

In many cities, respondents were concerned about the lack of safety (Thessaloniki, Brussels, Cluj, Dublin). The cities of Krakow and Budapest, among others, were worried about deficient cycling infrastructure. Amid this, Groningen stands out as a unique case as the only city where cycling is the most popular mode of transport for young people. This indicates that while cycling can be difficult in some cities, it is a popular and sustainable mode of transport in others. The fact that Groningen stands out as a city where cycling is the most used transport mode and where very few young people use cars suggests the positive impact of pro-cycling and pedestrian-focused urban planning strategies.

The city's approach of letting go of car-centred planning in favour of prioritising cyclists and pedestrians has likely contributed to this trend. This case highlights the potential benefits of creating dedicated cycling infrastructure, reducing speed limits, implementing low- and zero-emission zones and designing road networks that discourage car use within city centres.

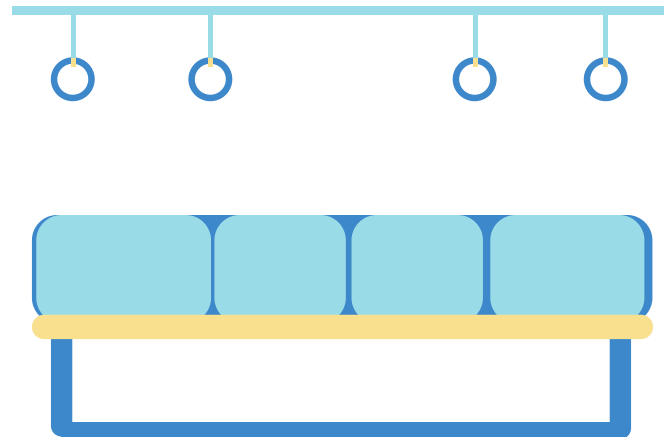
Public transport

Public transport, including buses, trams and metros, is commonly used by young people in most cities. There is, however, a **difference in use patterns between the cities**. In some cities, the bus is used the most, with 55% regular use in Cluj and 47% in Dublin, while in others, it is the metro (44% regular use in Brussels, 49% in Lisbon). In some cities, the tram is not that popular (in Lund, it is never used by 81% of respondents and in Dublin, by 46%). Only in Krakow is the tram the most used public transport mode, with 58% of regular users, while other cities have a more mixed usage.

Urban rail is not commonly used in most of the cities analysed. This might be because central train stations are mostly used for inter-city or international travel. Urban-rail transport could be more suitable for geographically vast cities, whereas in the cities analysed within this report, the tram or metro are better options (particularly for shorter, everyday distances). This diverse public transport use pattern underscores the mixed nature of public transport preferences in these cities as well as their geographic characteristics.

Satisfaction with public transport varies. While some respondents commend the frequency, accessibility, and reliability, there are others who do not share the same perception. Some respondents criticise the lack of reliable information on public transport services (such as in Krakow, Dublin, and Thessaloniki). Respondents expressed dissatisfaction with limited coverage and a lack of connectivity (such as in Lisbon and Dublin), as well as a lack of nighttime and weekend services (Cluj, Dublin, and Groningen). This highlights the need for expanding public transport networks, improving integration between different transport modes, and offering more services during the weekend and nights. Negative comments about strikes and service disruptions (Lisbon and Brussels) underscore the **need for stable and reliable public transport services and a supported workforce.**

Several comments highlight the positive environmental impact of using public transport, such as reducing traffic congestion and contributing to cleaner air, which reflects the environmental awareness of young people. In addition, dissatisfaction occurs when there is only one public transport mode available in their city (for example, Thessaloniki). This leads to the observation that, in certain urban areas, a metro and tram system are important to the younger population.



To delve deeper, critical remarks underscore the necessity of extending or establishing metro networks (particularly in cities like Cluj, where they are absent, and in Thessaloniki, where respondents have expressed impatience due to the gradual pace of construction) to cover more areas and provide better connectivity.

Scooter

Low scooter usage has been observed in many cities (for example, 81% of respondents in Groningen, 75% in Dublin and 69% in Budapest report that they never use scooters). Thessaloniki, Krakow and Brussels are the cities with the highest regular scooter usage (Thessaloniki has a regular use of 20%, Krakow 21% and Brussels 22%). Comments related to scooters are also absent, suggesting their limited presence or awareness in the urban mobility landscape.

This pattern highlights potential challenges and opportunities related to integrating scooters into the urban transport system to enhance livability and sustainability. Another noteworthy observation is the limited utilisation of scooters in Groningen, despite the city's well-established cycling infrastructure. This indicates that the situation extends beyond a simple substitution of cars, highlighting the presence of additional influencing factors.

These factors could encompass elements like behavioural tendencies and accessibility and availability challenges, which particularly impact the engagement of young people with scooter usage. This complexity underscores the need for a comprehensive approach when integrating scooters into the urban transport landscape. Overall, this signifies an opportunity for urban planners and policymakers to explore strategies for increasing the attractiveness of scooters as a viable option for sustainable mobility by better understanding why scooters are not widely used in a city.

Brussels stands out as the city with the highest scooter usage compared to the other cities. This could be attributed to the presence of numerous scooter-sharing platforms, which might contribute to the notable percentage of regular scooter users, albeit not reaching a significantly high level compared to other transport modes within the city. Furthermore, insights from the European mobility platform Bolt (a European scooter operator) corroborate this trend (Z). Data from 2022 reveals a **shift towards shared e-scooters and other micro-mobility options** as viable alternatives to private cars in Belgium. This data underscores the possible growing importance of these sustainable and convenient mobility solutions. However, it is important to note that, recently, Brussels implemented stricter rules on e-scooter usage due to, for example, scooters dumped on sidewalks in the city, and safety issues (The Brussels Times 2022). This could potentially impact the trend and result in lower usage rates in the future.

Cars

Car usage among young people in the cities analysed is mixed, with a substantial number using cars regularly (62% in Brussels, 57% in Lisbon, 54% in Thessaloniki, and 52% in Dublin) and, in contrast, a significant portion never using cars (64% in Groningen, 42% in Lund, and 35% in Lyon).

Several respondents were satisfied with the availability of parking spaces, and car accessibility is appreciated by car users. However, others mention car dependency and the need to reduce the number of cars on the road. The consistent theme of dissatisfaction with traffic congestion and car dependency underscores the importance of promoting alternatives to private car usage and improving public transport systems.

The data suggests that while car usage among young people varies, **there is a shared concern about traffic congestion, car dependency and the need for more sustainable and efficient urban mobility solutions**. This emphasises the importance of urban planning and policies that prioritise accessible, eco-friendly and reliable transportation options for those young people who do not own a car. This further aligns with the goals of reducing traffic congestion and promoting environmental sustainability.

Urban planning

Dissatisfaction with urban planning is expressed, particularly in terms of inadequate road infrastructure, traffic lights and overall city organisation. Moreover, it is pointed out in some cities, such as Thessaloniki, that a **long-term vision is needed** and, for example in Groningen, that there should **not be a reliance on only one transport mode**. Overall, urban planning should adopt an all-encompassing strategy. Cities must not neglect other forms of mobility when making improvements, but instead embrace a variety of transportation options.



The mixed feedback on satisfaction with public transport and car use shows that city planners must take into account different needs and the individuals adversely impacted by new initiatives while trying to reduce harm caused by change. Individuals who cannot afford new vehicles in a Low or Zero Emission Zone. Ultimately, the dissatisfaction expressed by young people in the survey highlights the importance of proactive and forward-thinking urban planning. As cities continue to grow and evolve, it's crucial to ensure that mobility solutions are not only functional but also contribute to a high quality of life for all residents. A holistic and sustainable approach to urban mobility planning can pave the way for vibrant, accessible and people-centric cities that thrive in the long run.

Delivery habits

The data highlights the **prevalence of online deliveries among young people** in the ten cities, however, with varying levels of frequency. Weekly delivery is common in cities such as Thessaloniki (34%) and Dublin (24%). This trend aligns with broader shifts towards e-commerce and the convenience it offers. These delivery habits have implications for transportation, environmental sustainability and the urban logistics infrastructure of the city, requiring thoughtful planning and management to ensure efficient and sustainable delivery systems. In many cities, a relatively large proportion (such as 37% in Budapest, 30% in Lund and 25% in Dublin) use deliveries only a few times a year, which highlights that some young people use online delivery for specific occasions or purposes rather than as a regular practice.

In all cities, **young people mostly order clothes/footwear/accessories online**, with the **most important reason being to save time**. Across the surveyed cities, many young people indicated their willingness to accept a prolonged delivery time in exchange for more sustainable options (with 50% in Groningen, 39% in Budapest, 32% in Brussels and 30% in Lisbon).

Only young people in Thessaloniki (8%) and Krakow (18%) had a very low acceptance percentage of a longer delivery time if it were more sustainable. A significant disparity emerged between the preferences for cost-effectiveness and sustainability. In all cities, the data consistently revealed that young people placed a higher priority on extending delivery times for cost savings than prioritising sustainability considerations (for example, 72% of respondents in Thessaloniki, 66% of respondents in Brussels and 63% in Cluj-Napoca). The data highlights the complexity between convenience, sustainability and cost in young people's online shopping behaviour. While **some are willing to wait longer for eco-friendly delivery**, which shows environmental awareness, **the priority remains cost over sustainability**, revealing the challenge of merging both.

Overall, the data reveals a strong inclination towards online delivery services among young people in these cities, driven by the desire for time efficiency and cost savings. However, there is room for encouraging more sustainable delivery practices and aligning these preferences with broader environmental goals.

Policy recommendations

While walking remains a dominant mode, promoting well-functioning public transport, cycling infrastructure and addressing delivery habits can collectively contribute to more sustainable and efficient urban mobility systems.

Cycling and walking

Several respondents called for better cycling and walking infrastructure, indicating a desire for safer and more attractive active transportation options. It is recommended to adopt a city approach that shifts away from a car-centred focus to prioritise cyclists and pedestrians by investing in dedicated cycling infrastructure, implementing lower speed limits, and designing road networks that discourage car use in city centres. The establishment of low- and zero-emission zones also helps to further sustainability and pollution reduction. Moreover, investing in pedestrian-friendly environments is important. Well-maintained sidewalks, pedestrian crossings, and safe walking zones encourage people to choose walking.

Public transport

To address the demand for enhanced urban mobility, policymakers should focus on establishing a comprehensive and accessible public transport system. Prioritising improved services during weekends and nights, as well as strengthening connectivity, will cater to diverse travel needs. Additionally, implementing effective communication strategies, such as providing clear schedules and real-time information at stops, can significantly enhance the overall public transport experience and meet the expectations of the community for more reliable and convenient transportation options. While there was sometimes positive feedback for buses, many young people expressed their preference for different transport modes.

Hence, cities need to diversify their transport modes by investing in expanding tram, metro, and intra-city rail service (as appropriate for each city's geographical context).

Scooters

Implementing scooter-sharing schemes or similar micro mobility ventures, while investing in educational communication on riding scooters and addressing safety and recycling issues, has the potential to promote their wider usage. They offer convenient, flexible, and cost-effective options for short trips, aligning with the desire for efficient alternatives to personal cars. Yet, addressing issues like safety, integration into transportation networks, sustainability (for example, scooter littering on the streets and recycling of old e-scooters), and proper infrastructure (designated lanes, parking facilities, etc.) is vital for the successful integration of scooters into urban mobility systems. Striking the right balance between safety and accessibility will be crucial for the continued success of micro mobility solutions as a sustainable transport mode. Furthermore, more research should be conducted on the long-term impacts of shared micro mobility in cities to ensure a well-informed approach.

Urban planning

To address urban planning concerns highlighted by the survey, policymakers and urban planners should adopt a comprehensive, forward-looking approach. It is important to address road infrastructure, traffic flow, and city organisation issues and recognise the need for a long-term vision. Planning for integrated mobility solutions that encompass public transit, cycling lanes, and pedestrian zones is crucial, all while keeping future transportation advancements in mind.

Proactive urban planning has the potential to significantly enhance the quality of life and foster vibrant cities. This is inherently linked to the reliability of public transport as well as behaviour-change initiatives that must be adopted in order to gain public support. Embracing sustainable and holistic strategies that prioritise accessibility, people-centred design, and long-term urban resilience can ensure that cities thrive in light of changing transportation landscapes.

Last-mile delivery

The findings of the report indicate that cost-effectiveness is a priority for the majority of young individuals, while sustainability also holds significance for a portion of the population. The majority of respondents answered that they would choose slower delivery times if this saved money. This suggests that more sustainable methods that may take longer, for example cargo bikes, lockers, or city centre hubs, would be actively chosen if they were cheaper. Urban planning should promote sustainable last-mile deliveries by accommodating dedicated lanes and pick-up points for eco-friendly couriers. Nudging strategies, subsidies for sustainable deliveries, collaboration with businesses, and continuous evaluation complete the framework. This comprehensive strategy would harmonise convenience, cost-effectiveness, and sustainability, advancing urban mobility and environmental goals.

Moreover, to foster sustainable delivery practises among young people in urban settings, policymakers should initiate a multifaceted approach. This involves incentivising eco-friendly delivery options by enhancing last-mile logistics with electric vehicles, centralised drop-off points, and promoting sustainable packaging. Education campaigns can raise awareness of environmentally conscious choices, while partnerships with delivery providers ensure transparency and adherence to sustainability standards.

The vast majority of respondents order clothing and accessories online. Communication campaigns and behaviour-change initiatives against this unnecessary consumption can help reduce environmentally and socially damaging orders.



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Authors

Julia Berndt
Ermioni Chatzimichail
Gemma Ellis

Design and Layout

Antoine Hattemer

Further Information

Generation Climate Europe

Email: cleanmobility@gceurope.org & cleancities@gceurope.org

A research paper from Generation Climate Europe, with the support and funding of the Clean Mobility Collective.