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PERSPECTIVES

# HOW THE BIRTH OF MOBILITY CULTURE AND THE RISE OF NEW CONSUMER VALUES WILL REDEFINE OUR JOURNEY FROM HERE TO THERE

ALLISON+  
PARTNERS



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**The best of emerging Silicon Valley companies and iconic automotive brands have transformed the way we travel. The attention and consumer adoption of ridesharing, carsharing services, e-scooters, e-bikes and other alternatives to traditional car ownership has hinted at the end of America's car culture.**

In a recent Allison+Partners study, we explored the impact technology has had on how we define transportation, and how an influx of new mobility options has paved the way for mobility culture's birth. Allison+Partners Senior Vice President and Automotive Specialty Group Head Marcus Gamo spoke to senior marketing and corporate communications leadership from Toyota, Uber and Trōv about the findings to learn how industry leaders adapt to this critical shift in consumer values.



**BRIAN LYONS**

Senior Manager of Advanced Technology Communications, Toyota



**DAVIS WHITE**

Director of California Public Affairs, Uber



**JEFF BEREZNY**

Head of Global Product & Marketing, Trōv



**MARCUS GAMO**

Senior Vice President, Allison+Partners



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## MARCUS GAMO

**Overall, what new aspects of transportation and mobility have captured your attention?**



### LYONS (TOYOTA)

The biggest news has been around connected automation and electrified vehicles. However, as Toyota continues to transition from an automobile to a mobility company, what's more interesting is how mobility culture is changing our business. We want to do more than just build hardware. We want to be of service to society – building its software, its platforms and really helping people reach the unreachable.



### BEREZNY (TRÖV)

Many are making predictions about what transportation will look like in the future, and I think many of those will be true. But what I'm shocked at is the rapid, unpredictable change. For example, I don't think anyone could have predicted what's happening with scooters right now. It's the Wild West in cities where they exist with people on and off sidewalks and there is very little regulation. That's something we're trying to tackle at Tröv – offering digital insurance that's built to adapt to the different cases that come up within mobility.

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## MARCUS GAMO

**Davis, a large part of your role at Uber is policy and regulation. What are your thoughts?**



### WHITE (UBER)

Yes, that's how I spend my days. I manage our policy communications for Uber across the Western United States. I also would not have predicted the bike and scooter activity this time last year. This year I've been working with the city of Los Angeles on the bike and scooter regulations that were recently released and final permits.

I judge what's happening with mobility innovation by what I have to do sometimes. A lot of these cities moved from a pilot to a one-year permit. We now not only have to ask what they're requiring, but also what connections exist between how they're regulating bikes and scooters with how they seek to regulate other modes of transit, be it cars or couriers.

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## MARCUS GAMO

**Thinking about innovation and the way we communicate about new mobility options, we seem to have arrived at a cultural shift. How would you define mobility culture today?**



### BEREZNY (TRÖV)

You have to ladder back to where mobility culture comes from, which would be car culture. It might not be exciting outside of a group of recreational enthusiasts to say, "I'm going to get a special license so that I can be part of this car culture." However, I think mobility culture today is very utility-based. It's less about a brand and more about the ability to get from one place to the other. This will likely change in the future, as the services get commoditized and brand becomes the differentiating factor.

It's confusing right now, and with confusion comes opportunity. Right now, if you travel from city to city, you have to open somewhere around 5 to 10 different mobility apps. There's this fragmentation of brands, and I personally think that it will all aggregate together and narrow into two or three big brands that will pick them up.



### WHITE (UBER)

Yes, the complex web of partnerships... In San Francisco, you can open your Uber app, rent a car, use Getaround and check out a bike or a scooter. But unfortunately, it's not the case everywhere. It would be great to expand accessibility to these services and that fewer platforms options are better, just as long as true partnerships are there.



### LYONS (TOYOTA)

All great points. From an automaker's perspective, it's more about figuring out how to satisfy all those needs. How do you develop a mobility as a service platform while still producing and selling personal vehicles and balancing automation and electrification? It's challenging, especially when trying to blend these approaches into a larger transportation ecosystem.

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## MARCUS GAMO

**Brian, you speak quite publicly about mobility being an inherent human right. That it's very much in our DNA. How has that sentiment fueled the way Toyota introduces mobility innovation and markets it, especially to consumers today?**



### LYONS (TOYOTA)

First off, it begins with a shift in company culture. I've been with Toyota over 33 years. But we're approaching mobility differently now. In the past, we didn't look at the human challenges that some people would have towards movement. It was always about building great cars that were fun to drive.

Now, we're considering how to make them more accessible for a broader range of people. Some of the things we're discussing today are new. For instance, how do we give back the keys to aging parents. Or, when automation finally arrives and we start seeing Level 4 and Level 5 autonomous vehicles, how do we build a car that is safer for a teenager to drive or ride in?

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**MARCUS GAMO**

**If we think about how technology can help keep the keys in an aging demographic's hands and still make sure that we're meeting the needs of today's youth, what from a policy standpoint needs to change?**

**WHITE (UBER)**

It's actually quite complicated. Lawmakers and trends officials have very hard jobs. While people might think Uber is regulated at the state level like insurance, our businesses is hyper-local down to the curb. So, we need to explore what partnerships can be formed with government around sharing data and improving operations for safety and congestion and really help cities rethink the future of the curb. Then we need to assess the impact that has on everything related – bike lanes, metered parking and more. There's a lot to consider and Uber will pop up at unlikely places with an opinion on everything from road or congestion pricing to help shape these decisions.

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**MARCUS GAMO**

**Jeff, from your perspective, how has the new mobility culture impacted the protection needs of those taking new forms of transportation?**

**BEREZNY (TRÖV)**

The introduction of new modes of transportation definitely creates new protection needs. For example, with autonomous vehicles, one of the most common statements around insurance is, "Oh, we won't need insurance anymore. There will be no accidents." Hopefully, yes, there will be no accidents. But it doesn't mean people don't need insurance. Rather, they might need a different type or the insurance just needs to move to a different place – either to the OEM or the manufacturer. That's something people will need to get their heads around, whether they're in an autonomous vehicle, an Uber or on a scooter. And there are still insurance requirements because somebody is liable if something happens. So, if you are on a scooter and, I don't know, crash into another car or crash into another scooter or cause an accident, there's a lot of confusion around who's liable for that right now in the different municipalities.

I think the perspective on insurance will change from, "I have to get insurance because I have a car," to, "I have to get insurance if I want to be mobile." This is a really important change and will take a while to get there. But if you want to use all these different modes of transportation, you'll have to get a type of insurance that covers you on all of them.

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**MARCUS GAMO**

**That's interesting because you're talking about multi-model transportation needs. From our recent study, it's clear there's a difference in attitudes on this, especially with Gen Z consumers. They actually just see a car as a functional need of transportation vs. a representation of themselves. What do you think is driving that change in attitude?**

**LYONS (TOYOTA)**

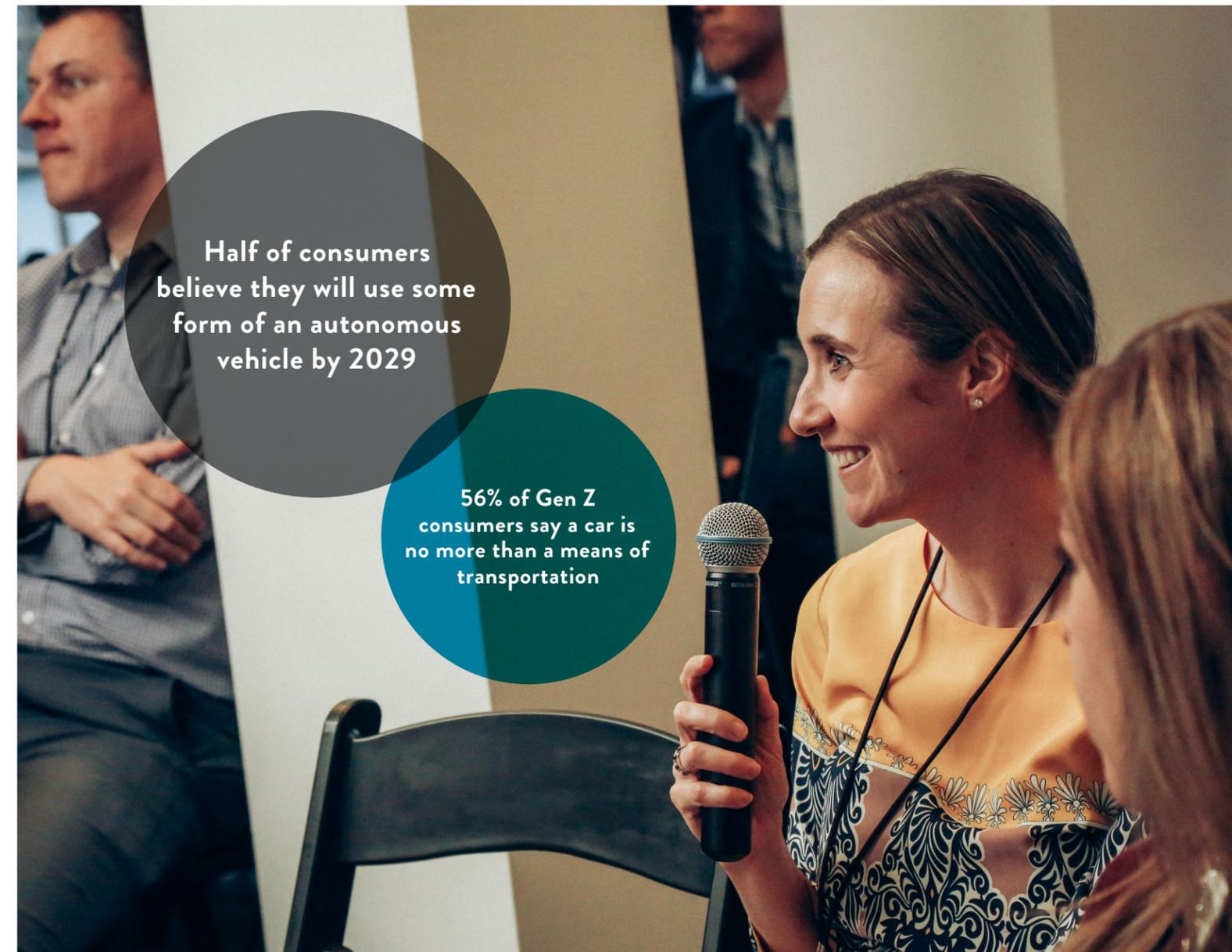
We've seen this to some degree over the past couple of generations. We thought millennials were done buying cars. But then, when they got married and started having kids, they started buying cars again. It was a needs-based decision – a life change that moved them into the car buying market. Now, you've got Gen Z that just has completely different interests. I can appreciate they're less into cars or see them more as an appliance or commodity, but will they change as they get older like millennials did? Time will tell.

**BEREZNY (TRÖV)**

I think it's clear by looking across all forms of communication that for younger generations, it's about connection. It began with being able to connect with people on Instagram or social media. Now, for millennials and Gen Z, transportation is another way to form connections. It's the deepest human desire.

**WHITE (UBER)**

I think it's a mix of a lot of exciting things coming together via this huge demand for the services new technology offers. But, also real investment in the product, whether it's maps, safety, bikes or scooters. People are really putting serious investment into these offerings and making them a lot better.



Half of consumers believe they will use some form of an autonomous vehicle by 2029

56% of Gen Z consumers say a car is no more than a means of transportation

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## MARCUS GAMO

**One brand can't solve mobility challenges alone. What role do partnerships play and how are each of you approaching mobility challenges through these?**



### WHITE (UBER)

I think it's competitive and that's a good thing. Partnerships are with government, competitors and folks in totally different spaces, like the rental car business. It's very exciting just to see what sticks and works for everyone.



### BEREZNY (TRÖV)

I think what's really interesting about partnerships is the space is so big. I like to use the classic business school example of the people who made the most money during the Gold Rush. They weren't the people trying to find the gold, but rather those who sold pickaxes to the goldminers. There's an entire secondary market of opportunities that may come through partnerships or secondary markets of services that may be less sexy than simply the automotive or transportation industries.

Insurance, to some degree, is just that and why we've taken the approach of turning insurance on its head. We're not bound by legacy insurance policies. We're only looking forward at emerging mobility. You start to think about all the different services that could be provided to passengers in an Uber or a self-driving car – from therapy to getting nails painted, assuming the rideshare is smooth enough. I think there's going to be a boom of opportunities there, and it's only through strategic partnerships that those things can happen.



### LYONS (TOYOTA)

I think about the relationship we have with Uber. There are synergies there. They're experts in things we have absolutely no idea how to do, including the rideshare business and mobility as a service. We built great hardware and are emerging as a good software company and platform development company. But through the e-Palette Alliance, we've literally asked Uber to help us design a piece of hardware, as well as the software and platform that goes along with it.

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## MARCUS GAMO

**Smartphones have been synonymous with productivity, entertainment and social experiences. And, we can't wait for our favorite smartphone brand to introduce the next generation of features every year. Is technology outpacing the realities of mobility innovation, or can the two coexist?**



### LYONS (TOYOTA)

There's really three ways to look at it. Sometimes, innovation takes a slow path and then there's the steep path. Then there's the hockey stick... and finally... boom – something happens. There have been cases with innovative technology, like lithium-ion batteries, that seemed to have had significant change over a short period of time. In reality, lithium batteries didn't change that much or that quickly, but certainly changed the market itself. That said, there are key elements we look at when planning for the future: artificial intelligence, ubiquitous connectivity, energy sources and material sciences. If you imagine the functionality of a cell phone, and then you try and build a car with the same basic concept, the flexibility, the adaptability, you have to be able to invest in it and research different materials and different techniques to do that.



### WHITE (UBER)

There are some big moments like ridesharing, e-bikes along with scooters and Pool. But, even when these moments aren't apparent, there are still big opportunities to change policy and impact future parking and future cities. They're all connected.



### BEREZNY (TRÖV)

Things are changing so fast, and I think we'll be surprised. We could say, "yes, it will be this or "it will be that," and there's all kinds of trend analysis on this. However, I think we'll be surprised on what it is that hits. As well, we should get ridesharing right in a given city before we expand and do other things, like scooters.

I'll use another analogy: The Model T. When that was first invented, they were trying to make horses better. They said, "How can we make the horse better? They said, "let's get rid of all that," but they didn't think immediately, "let's make a car." That's what we'll continue to see in automotive or in commercial mobility. That's what we see with scooters in a different level, and I think we'll continue to see that over the next 15 years.

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## MARCUS GAMO

**We've talked about car culture and what that means, as it's an iconic part of this country. We now are seeing the birth of mobility culture. Can the two co-exist?**



### LYONS (TOYOTA)

I think they have to. There's always going to be people who love to drive cars and love to work on cars. In fact, Toyota prioritizes programs in Japan around Takumi craftsmanship and monozukuri, the art of making things. We don't want to forget the physical skills required to build things. This culture is out there and will continue. It's not just buying a commodity, using it until it breaks and buying another one. There's a really big culture out there and people understanding what it takes to make something work and what it takes to build it.



### BEREZNY (TRÖV)

It'll be interesting to see from a brand point of view what that means. What is the mobility brand? Because there's so much fragmentation, how will they consolidate? Right now, people have a different connection with a Toyota or GM versus a Tesla. It'll be fascinating to watch mobility brands start to position themselves in different places in the consumer mindset.



### LYONS (TOYOTA)

What's interesting to me is the question: when do we know we're at the finish line as a mobility brand or a mobility company? For insurance companies, there's a model. The same is true for Uber as an innovator in its space. But for an older company like Toyota, when do we know we're a mobility company or when we're a mobility brand? There's no model to tie into.



### WHITE (UBER)

From our side, we're focused on trying to grow the power and have as many options possible for the consumers that want to use ours, and our job is to make it as best as possible.



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### MARCUS GAMO

**As transportation marketers, we talk so much about an autonomous future. Is that reality what we define as the ultimate achievement for mobility innovation? Or is that another opportunity for us to reinvent the journey of how we get from here to there?**



#### BEREZNY (TRÖV)

When you say, “autonomous or self-driving,” there’s a perception of what that is for a lot of people. There’s sort of like, “Would you buy a self-driven car?” We’re going to see so many different dimensions of autonomous. The easiest ones are going to be freight or buses or roads that are predictable, or robots delivering under a certain path.

I was in a hotel in San Diego and they had one of those robots that autonomously delivered snacks to my room, which seemed a little bit overkill. But, there’s going to be so many different flavors of autonomous that each will deliver some aspect of relevance to consumers. I personally don’t think many people will buy autonomous cars. I think these will be deployed with a shared service.



#### WHITE (UBER)

We saw this vision in Los Angeles when seeking out bike and scooter permits. There are so many different policy issues, like safety and equity and who’s responsible for accidents, compared to those we would see with autonomous vehicles. What happens when you want to ride an electric scooter from Venice to Santa Monica, cross the city street and get into a wreck? Those are conversations we’ll have to come up with autonomous vehicles as well.

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### MARCUS GAMO

**As Gen Z in particular looks at mobility as a shared experience or shared time, what excites each of you the most about these new consumer values?**



#### WHITE (UBER)

That’s exactly one of the key things that stood out to us in your study – that despite the attitudinal shifts, the value of brand will remain. Many think of Uber as still being a relatively new player. Uber has built up a significant amount of trust, loyalty and an advocacy for a lot of the right reasons, and I think that value of brand will continue.



#### BEREZNY (TRÖV)

To win with Gen Z, we have to think in three main buckets: access, efficiency and safety. I think that the big benefit of this whole explosion of mobility is that you’re going to be able to access things you’ve never been able to access before, and that’s going to draw customers in.

If you’re going to be able to do it in the fastest, most efficient way possible, which hopefully solves some traffic problems, it’s going to be safer, which is obviously really exciting. I think when you put all three of those things together, it turns a lot of the things that we just put up with today with transportation on its head. We put up with sitting in traffic, we put up with horrible accidents. I think that the proposition in the future will say that’s unacceptable, it needs to be accessible, it needs to be efficient and it needs to be safe.



#### LYONS (TOYOTA)

I love that language, and I would like that when you think “mobility,” those three attributes are unspoken or shared. I hope someday that when we say mobility, it will be a given that it’s inclusive, accessible, ubiquitous, environmentally considerate and safe.

**46% of Gen Z consumers agree the most important factor of autonomous vehicles is the brand making the car**

# PANELIST BIOGRAPHIES



**BRIAN LYONS**  
Senior Manager, Advanced Technology Communications

Brian R. Lyons is senior manager, Advanced Technology Communications for Toyota Motor North America in Plano, Texas.

Lyons is responsible for developing, delivering and strategic management of technology communications for Toyota and Lexus vehicles in the United States. Technology communications includes, automated and autonomous driving, advanced driver support systems, advanced powertrains (BEV, FCV, HV, etc.), crash testing, telematics and connectivity, and safety communications. Prior to assuming his current duties, he was the Senior Manager for Lexus International Strategic Communications.

Since joining Toyota in 1986, Lyons has held a variety of positions, including Safety and Quality Communications manager, Technical Support manager, Powertrain Quality Assurance manager, Body and Paint Quality Assurance manager, Convertible and Accessory Quality Assurance manager, Convertible Project manager, Supplier Quality Assurance manager, Accessory Development engineer, and Inspection supervisor.

Lyons was also assigned to Toyota Motor Corporation from July 2013 to January 2016 as the Group Manager of Global Communications.

Prior to his career with Toyota, Lyons held engineering positions in the aerospace industry and was a rescue swimmer and helicopter crew chief in the United States Navy.

Lyons earned a bachelor of science degree in management from Pepperdine University in Malibu, Calif.



**JEFF BEREZNY**  
Head of Global Product and Marketing, Trōv

Jeff Berezny is a tech-obsessed marketer and strategist with a solid track record of accelerating brands online. After spending several years leading brand strategy at tier one CPG companies, including Johnson & Johnson, Jeff started Tent Media, a global digital marketing agency. Tent Media was hired to jumpstart Trōv's marketing in the early days and then Jeff transitioned to the Trōv leadership team to lead marketing and communications full-time. Since then he's taken on a broader role of leading global product and marketing for Trōv as it rapidly evolves its product offering and expands globally.



**DAVIS WHITE**  
Director of California Public Affairs, Uber

Davis oversees relationships with key policy makers across strategic California markets for Uber that help advance mobility solutions for a number of communities. Prior to his role at Uber, Davis managed public policy and government relations for Google in support of the brand's initiatives across Silicon Valley and Southern California. He has also served as a Director for Senator John McCain's 2008 Presidential Campaign, where he oversaw all operations along with helping shape messages shared during community events. As well, he served as a White House Staffer for President George W. Bush where he managed public policy outreach in support of the President's initiatives, including Supreme Court nominees, legislation and executive orders. Davis earned his Bachelor's degree in American History from Washington and Lee University in Lexington, Va.



**MARCUS GAMO**  
Senior Vice President, Global Automotive Specialty Lead,  
Allison+Partners

Storytelling around mobility is more than simply helping automakers sell cars. Rather, Marcus as the agency's head of its automotive specialty area, supports a diversity of brands to communicate unique visions for the future of mobility through integrated communications programs that reach reporters, social influencers, automotive + transportation analysts along with drivers themselves. With more than a decade of automotive industry experience, Marcus oversees strategic work for a number of past and current Allison+Partners mobility clients, including Toyota and Lexus across the U.S., Ridecell, the BMW-backed MaaS brand, Unity, the real-time AR/VR design platform used by global automakers to modernize the car design process and the Level 2 EV smart charge company eMotorWerks.

His work with Toyota focuses on the development of creative campaigns in support of global brand priorities, including helping introduce Toyota to its new community in Plano, Texas as well as launch Toyota's first hydrogen fuel-cell EV in the U.S., Mirai. Marcus has guided creative programs for the MaaS and BMW-backed brand RideCell and Best Western's decade-long sponsorship of NASCAR while at A+P along with Zipcar and Buick during his career while at Vorhaus Communications in New York.

Marcus has a background in visual storytelling as a former television reporter, beginning his career in front of the camera across Georgia as well as the island of Guam.





# ALLISON+ PARTNERS

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## ABOUT ALLISON+PARTNERS

Allison+Partners, an **MDC Partners** company, is a global marketing and communications agency driven by a collaborative approach to innovation and creativity. The firm was named The Holmes Report's 2019 "Best Agency to Work For," PRWeek's 2018 "Best Place to Work" and The Holmes Report's 2017 "Digital Agency of the Year." Allison+Partners has 30 offices worldwide and is organized around five practices: Consumer Marketing, Corporate, Healthcare, Public Affairs and Technology. All Told, which combines research, content, creative, digital and measurement expertise into one offering, works across these practices to deliver integrated storytelling for clients. The agency also has a network and deep affiliations with firms worldwide through MDC Partners (NASDAQ: MDCA), a progressive marketing and communications network, championing the most innovative entrepreneurial talent. For more information, visit [www.allisonpr.com](http://www.allisonpr.com).

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