PRESS RELEASE

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Keolis publishes the Keoscopie International global mobility study

- **6,600 people were interviewed in 37 cities across 15 countries, to explore mobility habits, how people use new technologies, and the impact that they have on their mobility.**
- **The study's findings include the respondents' high expectations on public transport, the growing popularity of mobility apps on smartphones and the complementarity of public transport and new mobility solutions.**
- **The study enhances Keolis' capacity to meet passenger needs and to develop bespoke mobility policies that are compatible with public transport authorities' strategies.**

Keolis, in partnership with Ipsos, has published the results of Keoscopie International, a new global mobility study investigating the habits of a sample made up of 6,600 people based in 37 cities across 15 countries. The study looks at mobility habits of people living in different cities, how those people use new technologies, and the impact that digital technologies have on their mobility. The study also highlights specific national or local features (cf. focus at the end of this press release on Paris, Lyon, London and Shanghai). **Keoscopie International** *is available here in summary with the full results here)*

Keoscopie International originated in the Keoscopie study which was first launched in 2007 in France. The study looks at socio-demographic changes including work patterns, use of digital technologies, life expectancy and regional development and the impact of these changes on mobility. The study, which reflects Keolis' commitment to responding to passengers' needs as effectively as possible, has been used to develop bespoke mobility policies that are compatible with public transport authorities' objectives and passenger aspirations. Operating in 16 countries in partnership with 300 Public Transport Authorities, 2018 saw Keolis decide to expand the study's scope to become a worldwide study taking in 37 cities in 15 countries.

Key findings from Keoscopie International

In terms of new technologies

- A large majority of respondents are equipped with a smartphone

Globally, 89% of respondents are equipped with a smartphone. There are large disparities between countries, as well as within the same country. The equipment rate is 99% in Shanghai compared to 87% in Paris, 88% in Lyon, 86% in London and 79% in Rotterdam.

- A large majority of respondents use a transportation app for travel

70% of respondents with a smartphone use a transport app or maps and plans at least once a month. They use on average three different ones, mostly to consult maps (61%), search for the best route (53%), check the schedule of the next departure (46%), search for timetables (45%) and be informed directly via notifications/alerts (45%).

- However, the digital divide remains and the sense of being able to be quickly overtaken by new technologies is real, even among the most connected

The survey reveals a relationship between smartphones and technology that varies widely from one country to another. **32% of respondents say they are "*Digimobiles*"**, meaning they own a smartphone, are ultra-connected and feel completely comfortable using it for almost everything. In France, 28% of respondents fall into this category, half as much as in China (57%).

However, while the vast majority of *digimobiles* (92%) believes that **technologies play an essential role in simplifying their travel** (by car, on public transport or in other means of transport), almost half of them are concerned **that at the rate at which technologies are evolving, they could be left behind (48%).** 71% of *digimobiles* are concerned about how companies use their personal data.

Conversely, 20% of respondents say they are "offline": they only use their mobile phone or smartphone to communicate (phone, send messages) and possibly take pictures - or don't have one at all. 5% of respondents in China fall into this category compared to 30% in Montreal.

In terms of mobility

- Irregular and non-standardized work rhythms

One in two people (54%) states that the days of the week when s/he works or studies changes all the time or occasionally. At the same time, the 'home office' is becoming a reality for more than a quarter of the population (26%), who report working at least once a week from home. This is only 17% in China, but 43% in Mumbai.

- Various reasons for travel

In addition to commuting to work or study, **the reasons for weekly travel** (one or more times a week) are diverse: shopping for 36% of respondents, visiting family members or friends for 22%, and play sports or cultural activity for 17%.

- The anchored multimodality

The use of different modes of transport for a regular route is widespread: 62% report using different modes on the way and back and 57% change mode from one day to the next.

- Many reasons to prefer public transport to cars

51% of respondents who opt for public transport at the expense of the car do so because of the **difficulty of finding a parking space,** 31% because they prefer a reliable mode of transport and want to avoid traffic jams (possibility to predict travel time in advance, fewer unforeseen traffic incidents than by car...) and 28% because they find they arrive faster using public transport.

In terms of the impact of technology on mobility in cities

- Technology, a factor of fluidity and simplicity

83% of respondents believe that technology plays an essential role in simplifying their travel (by car, public transit or any other mode of travel), including for:

- choosing the right mode of transport at the right time.
- having access to multiple modes of transport (self-service fleet, shared vehicles etc).
- optimising their journey route and duration.

- A real complementarity between public transport and new mobility solutions

The use of new mobility solutions facilitated by technology is already well established as demonstrated by the popularity of chauffeur-driven tourist vehicles, *electric bikes, carpooling, car-sharing, scooters, segways, monowheels and hoverboards*. 38% of respondents already use them at least once a month.

Users of new mobility solutions (at least once a week):

- use public transport more: 70% use it at least once a week compared to only 51% for the general population
- are more *digimobiles* than average (42% vs. 32%)
- have more variable work/study rates than average (66% vs. 54% on "this changes all the time or occasionally")

There is real potential for new mobility solutions as 65% of respondents say they are potential users of these solutions.

- High expectations on public transport

The level of satisfaction with public transport is high: 41% of metro users and 36% of bus users rate these modes of transport between 8 and 10 out of 10 in their cities.

However, two major expectations stand out regarding mobility: 45% of those surveyed want an improvement in the frequency of transit, including weekends and evenings, and 40% want an improvement in the comfort in public transport (air conditioning, seats, etc.).

Focus on the results obtained between Paris, Lyon, London and Shanghai

percentage of each city's population	Paris	Lyon	London	Shanghai
Who own a smartphone	87	88	86	99
Who use map, plan or transport apps at least once a month	75	69	70	84
Who opt for another form of transport before public transport (all the time or nearly)	43	51	41	44
Who use different modes of transport from one day to the next for a regular journey	40	47	50	67
Who are satisfied with the transport available in their town, awarding it a score of between 8/10 and 10/10	Bus: 32	43	39	53
	Metro: 33	60	40	72

About Keolis

Keolis is a pioneer in developing public transport systems and works alongside public decision-makers who want to turn shared mobility systems into levers to enhance the appeal and vitality of their regions. A world leader in operating automated metro and tramway systems, Keolis is supported by a sustained and open innovative policy alongside all of its partners and subsidiaries – Kisio, EFFIA, Keolis Santé and Cykleo – to bolster its core business and develop new innovative and bespoke shared mobility solutions, including trains, buses and coaches, trolleybuses, shared car solutions, river and sea shuttle services, bike share services, car sharing, fully electric driverless shuttles and urban cable cars. In France, Keolis is the second largest parking company through its subsidiary EFFIA, and the country's leading medical transport solution since the creation of Keolis Santé in July 2017.

The Group is 70%-owned by SNCF and 30%-owned by the Caisse de Dépôt et Placement du Québec (Quebec Deposit and Investment Fund), and employs some 65,000 people in 16 countries. In 2018, it posted revenue of €5.9 billion. In 2018, 3.3 billion passengers used one of Keolis' shared mobility services.

* Keolis is well-established in France and also operates in Australia, Belgium, Canada, China, Denmark, Germany, India, Luxembourg, the Netherlands, Norway, Qatar, Senegal, Sweden, the United Kingdom and the United States.

CONTACT

Linda HUGUET
International Communications Manager
+33 (0)1 71 32 98 43 / Linda.Huguet@keolis.com