

DERRIÈRE LES APPARÉNCES

#1

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7 contradictions and myths of aspirations to mobility



Our mobility surveys show a frail balance between contradicting needs that are difficult to balance. In a society increasingly marked by personalized consumer behavior, public transit often offers the same response to diverse needs. So how do we meet mobility expectations that are often at odds with each other? Each generation aspires to transport solutions that reflect its individual needs and sense of belonging, flexibility and stability, or the desire to reduce its ecological footprint without sacrificing comfort. This article explores these underlying contradictions and suggests ways in which Keolis subsidiaries can adapt their transport offer to meet these complex expectations.

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KEO
SCOPIE

IMAGINING TOMORROW'S MOBILITY

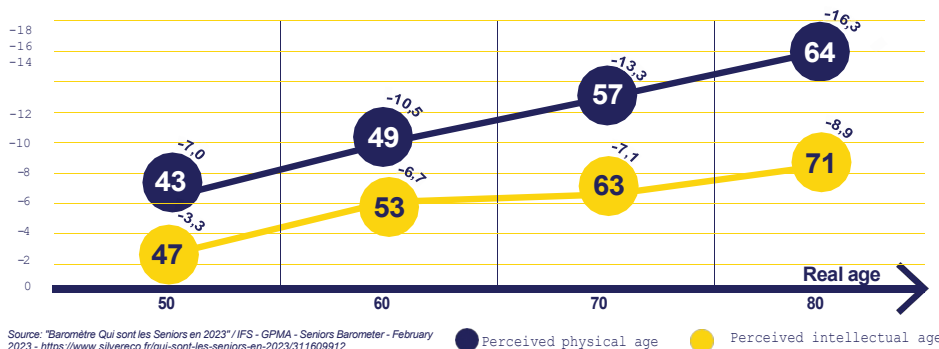
PARADOX 1

Being independent while being taken care of

Today, users of all ages are looking for a transport experience that enhances their individuality while integrating them into a harmonious collective. For senior citizen, this paradox is particularly visible.

Many "senior citizen" claim their autonomy, their freedom and their desire to remain mobile for as long as possible, even when they're facing age-related frailties ("age is just a number").

For example, in a study conducted by the French National Institute for Health and Medical Research (Inserm), a 78-year-old participant declared: "I like to do my shopping on my own. It's important for me to keep this independence, even if it's sometimes tiring." Similarly, a report by Cerema highlights the words of a senior citizen who said: "Driving gives me a feeling of freedom. As long as I can do it safely, I'll keep going."



> A 70-year-old senior feels physically like 63-year-old and intellectually like a 57-year-old.



Travelers' expectations are full of paradoxes



We need to be able to take care of their specific needs without making them feel different. Our approach on supporting travelers must therefore be as non-stigmatizing as possible.



The expectation of autonomy must also include the deployment of fast, reliable, high-level service lines, complemented by local services as close to home as possible.

These testimonials illustrate the desire of older people to maintain their autonomy and freedom of movement, despite physical or cognitive challenges they may encounter. In fact, there's a seven to ten years gap between real age and perceived physical age.

It is agreed that the public transport network must take their specific needs into account, without singling them out or stigmatizing them, so that the most vulnerable feel like everyone else.

Citizens express a strong need for autonomy, while at the same time expressing a desire for occasional support for certain journeys, particularly long journeys or journeys with atypical hours. Among senior citizens, this tension is particularly marked: around 52% of the over-70s want to retain their independence when traveling but indicate that they appreciate support for specific journeys or when they are less comfortable. As a 74-year-old senior commented: "I'm happy to get around on my own for most journeys, but when it comes to medical appointments, a little help is welcome."

Importance of not overloading senior citizen with information: "Bus, streetcar, park-and-ride, community transport, car-sharing, car-pooling, Senior discount card... during a workshop organized by Wimoov with seniors, all options are explained, but this can be overwhelming. In Paulette's own words, "I will have forgotten everything tomorrow". In this user group, the youngest participant is 77, and it's not easy to assimilate all these information.

According to one of our study, 40% of seniors express a need for support in the evening of journeys further afield, as they feel less at ease outside their routine. "Going out in the evening can be complicated, but having an adapted service would make things much simpler", explains a user. This balance between independence and the need for support underlines the importance for Keolis of providing services that meet these expectations.

PARADOX 2

Having a public transport offer but not using it

For young adults, this desire for individuality is also expressed in an ambivalent way. While 45% of the under-25s own a car, this possession is more to have sense of security than a preference. As one young user confides: "The car is still a question of freedom, but I don't want to depend on it anymore." Indeed, for them, the car remains associated with freedom, but at the time, they aspire to more sustainable modes of transportation, feeling guilty about their environmental impact. This contradiction is illustrated by the use of multimodal transport among young adults.

53% of young adults alternate between several modes of transport suited to their specific needs.

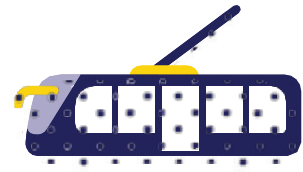
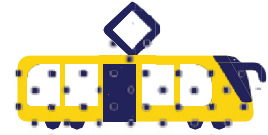
However, collective infrastructures do not always meet individual expectations: "I'd like public transport to be more like me, to meet my specific needs", confides a 35-year-old user. While flexibility is at the heart of modern expectations, it often coexists with a desire for stability, due to the irregularity of lifestyles. Adults, but also young people and "seniors", want transport modes that adapt to their changing schedules. However, at the same time, they express some form of anxiety about the lack of predictability. A young 24-year-old user confides: "I like being able to improvise my journeys, but I need to know that I can always find a way home"



"I'd like public transport to be more like me, to meet my specific needs".

A 35-year-old user

This ambivalence is also felt by senior citizens, for whom the regularity and predictability of services are essential to their comfort and safety, but who need to have a sense of freedom: "My daily commute needs to be a reliable routine, but I'd also like to be able to go out spontaneously whenever I like to," explains a senior citizen.



For travelers, public transport must be available, even if don't choose it. Their expectations are high: they want a multimodal choice as well as a permanently attractive offer. It's important to communicate the availability of our offer, even to those who rarely use it.

PARADOX 3

Save the planet without changing your habits

According to a UTP 2024 survey, ecological impact is not one of the most important criteria when choosing a transport mode. Practicality (80%), speed (74%) and safety (68%) are far ahead of the ecological impact (70%). Yet the desire for more sustainable mobility is a strong trend, particularly among younger generations.

Nearly 67% of young people surveyed said they were concerned about the environmental impact of their journeys and would like to use more environmentally friendly means of transportation.

The urgency of climate change and the importance of reducing CO2 emissions have become central concerns for many citizens, particularly among younger generations. However, a persistent contradiction is emerging : although the majority of young people declare themselves ready to adopt more sustainable behaviors, their daily habits remain unchanged as long as the solutions proposed do not meet their expectations of comfort and practicality.

"I'd really like to do without the car for ecological reasons, but there's just no way of getting around it.



"Ecological awareness is important, but unless we have the confidence that we will be having a smooth journey, we remain tempted by the car. We don't want to sacrifice our time to be green".



"We're willing to change for the sake of the planet, but not at the cost of our daily comfort".

One participant

"I simply don't have enough practical options for my daily commute", explained a 27-year-old woman during the Keolis 2023 survey on work patterns and mobility. This testimonial illustrates the gap between the environmental commitment in principle and the reality of commuting constraints. For many users, sustainability remains a priority, but only if it is accompanied by the ease of use and comfort to which they are accustomed.

The results of the Keolis post-Covid barometer show that, despite increased ecological awareness, 41% of young people use their car for commuting.

The lack of an adequate alternative in terms of frequency and speed. Immediate proximity and flexibility remain key criteria daily commuting. As a result, even the most ecologically aware users end up preferring the solution that offers the most comfort: "We're willing to change for the good of the planet, but not at the cost of our daily comfort", sums up one participant.

Consumer and travel behavior reveal a profound paradox between the desire to adopt durable mobility and the maintenance of personal comfort habits. 52% of respondents to the Keolis fare survey said they would consider using public transport more if it guaranteed the same standards of speed and convenience as their personal vehicles. However, one user explains:

"Ecological awareness is important, but as long we don't have the certainty of a smooth trip, we remain tempted by the car. We don't want to sacrifice our time to be green"

This paradox also affects other traveler segments. Senior citizens, for example, say they are generally aware of the environmental impact of their journeys and are ready to reduce their use. However, they maintain this habit out of fear that public transport does not guarantee them an adequate level of comfort, especially during rush hours when the crowds create a feeling of discomfort, with a high risk of falling.

Nearly 60% of senior citizens prefer to take their car to avoid the crowds and potentially uncomfortable conditions of public transport



Although the majority of citizens want to "save the planet", this desire often remains theoretical when it comes to conflicts with comfort and long-established habits. This paradox highlights the challenge for transport operators to offer services that simultaneously meet ecological challenges and modern comfort requirements.

To encourage people to really change their habits, we need to develop mobility offers that combine sustainability, frequency, availability and comfort, thus reducing gap between ecological aspirations and actual practices.

PARADOX 4

A one-way
commitment

Flexibility has become a central requirement in post-pandemic mobility behaviours, as citizens now value freedom of movement without the constraint of commitment. This need for freedom is reflected in growing demand for adaptable, non-binding transport solutions, tailored to changing work rhythms and lifestyles. However, at the same time, the Keolis study highlights a paradoxical reality: while users appreciate freedom of use, a significant proportion say they are ready to return to long-term subscriptions if these meet their need for flexibility. As underlined by the study carried out on the Caen-la-Mer network in 2021, occasional subscribers say they are reassured by the freedom to pay only for journeys made, but they would also like the reassurance of an annual subscription without having to re-commit each month.

The qualitative study carried out by Keolis with "drop-out" users (after COVID-19 lockdowns) also shows that, although 52% of these former subscribers have reduced their use of public transport due to changes habits such as telecommuting, 35% would consider taking out a permanent subscription again if it meant a level of guaranteed flexibility,



"I'd like to go back to an annual subscription, but I don't want to feel stuck if my situation changes,"

A former subscriber

As the choice of flexible subscription periods without additional fees. "Flexibility is reassuring, but the idea of having to systematically pay each month doesn't encourage me. If I could commit to a year with no-penalty suspension options, I'd take up a subscription again", confides a former subscriber to the Ilevia network (*Study on dropouts in Lille 2021*).

The health crisis has not only disrupted commuting habits, it has also instilled a sense of uncertainty that dissuades users from making long-term commitments. According to the Keolis post-Covid survey, 55% of teleworkers consider that their situation could change, which explains their reluctance to commit to annual or half-yearly packages. "We're offered annual subscriptions, but if telecommuting increases again, I'd prefer to pay by the month to retain flexibility", explains one study participant, highlighting the interest in flexible plans to fine-tune costs and mobility needs. "I'd like to go back to an annual subscription, but I don't want to feel stuck if my situation changes", stresses another former subscriber from Caen.



"Flexibility is reassuring, but the idea of having to systematically pay every month doesn't encourage me. If I could commit to a one-year contract with options

of suspension without penalty, I'd take up a subscription again".

A former customer of the Ilevia network

Despite this, long-term commitment remains an attractive feature, especially when pricing conditions become more flexible.

Thus, a significant proportion of users (particularly among regular working people) say they are interested by the idea of a long-term subscription including possible breaks free of charge, as shown by the survey carried out in May 2021: "Post-payment and flexible subscriptions encourage use, but it's not enough to make me give up a subscription altogether. If an annual commitment left me hanging on for months, I'd be ready to go back to it," says an active user.



This paradox between flexibility and commitment highlights the need for customized offers. For transport networks to meet modern aspirations, they need to combine freedom of movement with financial security, while simplifying subscription conditions.

Commitment is a one-way street: we need the comfort of certainty, but the freedom of suspension. One of the key factors in the reengagement of some customers is the possibility of suspending the annual subscription.

PARADOX 5

Ultra-simple rates, perfectly adapted to my specific needs

Fare simplicity is often cited as a key criterion to support the use of public transport, with users expressing a need for clarity in fare offers to avoid complexity of choice. According to a study carried out by Keolis in a medium-sized city, 60% of users say they appreciate simple, easy-to-understand fare offers, such as pay-as-you-go fares or standard monthly passes. These offers are deemed "clear and reassuring", as they make it easy to understand costs without having to delve into complex formulas. "I prefer a single rate, even if it costs me a bit more. It saves me having to calculate which is the most advantageous", explains an active user, underlining the importance of transparency and simplicity in building trust in the operator.

However, this demand for simplicity comes up against the diversity of user profiles, who are looking for formulas adapted to their mobility situations and habits. Studies show that different segments of the population - teleworkers, senior citizens, students, families - have specific expectations that vary widely according to their travel frequency, schedules and personal constraints. For example, a teleworker only use public transport two or three days a week, a frequency that makes conventional season tickets less attractive. A telecommuting worker confides: "It's frustrating to pay full fare for just a few days' use. I'd like a subscription takes into account the reality of my journeys", which shows a strong desire for flexibility (Keolis - Post-Covid survey). Similarly, young working people and students express an interest in flexible subscriptions, where the cost is adapted to their usage.

42% of young people who have stopped their subscription say they would be willing to come back if flexible pricing, adapted to use, were offered (Lille study on dropouts).

This paradox is particularly pronounced among students and young professionals, who aspire to accessible pricing tailored to their needs without having to deal with the complexity of multiple formulas: "It would be nice to have an offer like that of the telecoms, with packages adapted to what we really use", explains a 22-year-old student from Caen, illustrating the importance of a personalized and economical offer.

Post-payment and flexible subscriptions meet expectations, but implementation remains complex. One employee expressed this frustration: "Flexible fares are a good idea, but by adding so many options, you end up losing your way" (Keolis - Caen study).

Others, particularly the most vulnerable, are also looking for adapted solutions, especially for off-peak travel, but deplore the fact that existing offers do not take sufficient account of their specific needs.

58% of seniors would like lower fares during less busy periods, as they avoid rush hours for greater comfort

However, many also stressed the confusion caused by the different types of rates available, and the difficulty of finding the most advantageous formula without becoming overly complex. One senior citizen echoed this feeling, saying: "It's good have different rates for different people, but it quickly becomes complicated. I'd like to keep fares simple, even with specific off-peak discounts"



"It's frustrating to pay full price for just a few days' use. I'd like a pass that considers the reality of my journeys".

Keolis - Post-Covid survey



This paradox between simple fares and personalised offers underlines a major challenge for Keolis: how to offer formulas that are both accessible and diverse without burdening the pricing structure? The three watchwords seem to be legibility, consistency of offer and pedagogy, in order to meet a wide variety of expectations. Adapting fare costs to household incomes can be a good way to provide adapted rates, while maintaining a comprehensible fee structure.

PARADOX 6

When modernization rhymes with hesitation

Public transport networks are constantly seeking to modernize in order to offer faster, more connected services adapted to contemporary needs. These transformation efforts, whether technological - such as the dematerialization of tickets and the digitization of information - or architectural, such as modernized stations, respond to the expectations of new generations of users who value innovation.

A study carried out by Keolis shows that 78% of young users (less than 35 years old) in a medium-sized french city are in favor of digital tools for accessing trip information and making online payments

These technologies are perceived as practical and fast: "I want information at my finger tips, paper is out," confides a student, illustrating the appeal of modernity and the immediate comfort offered by digital innovations in the survey conducted by Keolis after the Covid.

According to a UTP survey (October 2024), electronic ticketing is practical for 72% of users. However, this positive perception is more prevalent among younger people: 79% in the 15-27 age group, versus 62% in the 78+ age group. This modernization is not uniformly perceived by all users, and a certain nostalgia for the old network persists, particularly among the elderly.

Nearly 34% of senior citizens questioned in a study on hidden vulnerabilities have an attachment to traditional practices and infrastructures. "Automatic machines are all good, but I preferred to buy my ticket at the counter. It was more user-friendly". For many of these users, the old practices were synonymous with simplicity and accessibility, qualities that sometimes seem compromised by digital innovations. This paradox between the modern image of transport networks and nostalgia for the old networks is also evident in the infrastructure.



"I want information at my finger tips, paper is outdated".

A 21-year-old student

47% of long-time users regret the replacement of some stations, which they saw as familiar landmarks with a unique aesthetic. "The new stations are modern, but they don't have the charm of the previous ones. You feel like you're in an airport, it's not the same spirit", confides a user, illustrating the difficulty of replacing certain historical symbols



Automatic machines are all good, but I preferred to buy my ticket at the counter. It was more user-friendly.

An elderly user



The attachment to public transport and its sensitive world is strong among some of our passengers. While network modernization is viewed positively by the vast majority of users, there is a strong attachment to symbols, public transport sites and human presence. Enhancing the networks' heritage could be a way of comforting these nostalgic passengers.

PARADOX 7

Time saved becomes time lost



"If I had a good Internet connection, I wouldn't see my journeys as a waste of time. I could work on my projects or check my e-mails".

A 29-year-old female executive

Public transport is often chosen for its time efficiency. It avoids traffic jams, reduces driving stress and gets to your destination faster than other modes of transportation, especially in urban areas.

65% of commuters in a medium-sized city say they use public transport to "save time on their daily journeys".

However, this perception is followed by a paradox: once on board, users often express the feeling of "wasting time", as it's not possible to use this time productively or enjoyably. "When I'm on the train or bus, I feel like I'm wasting my time if I can't work or relax properly. It's frustrating", confides a 34-year-old regular user of transport in the Paris region.

Driving a car is often considered as a waste of time whereas public transport usually enables a better use of our time. However, people's subjective experience can sometimes contradict this statement

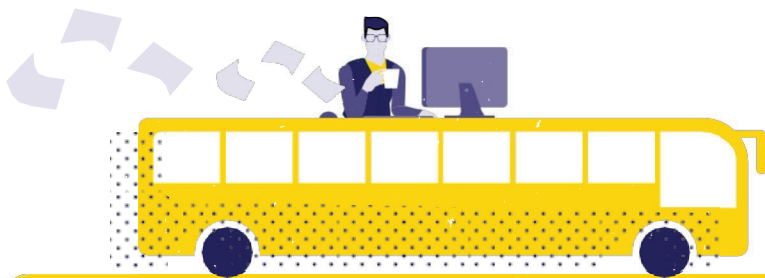
40% of users say they are dissatisfied with the interior layout of vehicles, citing uncomfortable seats, cluttered spaces and lack of adapted equipment (electrical sockets, folding tables etc.) (Study on work rhythms...).

These shortcomings make it difficult to use commuting time for productive activities or reading. What's more, the lack of stable connectivity is a major obstacle to optimizing travel time. 50% of commuters surveyed on a big french network said that the lack of 4G or Wi-Fi networks on buses and subways limits their ability to work or stay connected (*Accessibility Study*). "If I had a good Internet connection, I wouldn't see my journeys as a waste of time. I could on with my projects or check my e-mails", an executive explains.



"When I'm on the train or bus, I feel like I'm wasting my time if I can't work or relax properly. It's frustrating."

A user from Paris region



This paradox of wasted time underlines the importance for Keolis of enhancing the value of time spent on its networks. By transforming the journey into a productive moment, we make public transport more attractive than individual alternatives. The main avenues to be explored involve improving comfort, connectivity and interior design.

CONCLUSION

Thinking like our passengers, paradoxical and contradictory



These seven paradoxes highlight the complex tensions that run through the aspirations of public transport users. At a time when public transport networks are seeking to reinvent themselves to meet diverse needs, they find themselves confronted with often contradictory expectations. Citizens want to be autonomous but still benefit from assistance; they prefer simple fares, but demand services tailored to their specific needs; and they aspire to save the planet without sacrificing comfort.

These contradictions are not dead ends, but rather opportunities for public transport models to evolve. They bear witness to societal evolutions: the increasing personalization of expectations, the growing importance of ecological considerations and changing life rhythms. These trends require operators to adapt constantly, developing flexible and innovative solutions, without losing sight of the fundamental principles of accessibility, permanence, attractiveness and simplicity.

Understanding these paradoxes means reaffirming Keolis' position of always placing the passenger at the center of our approach, taking into account their paradoxes and contradictions, and accepting that very strong sensitivities, when it comes to public transport, won't always be able to be satisfied.

