

KEO FLASH SCOPIE

IMAGINING TOMORROW'S MOBILITY

To go to school :
less walk, more car

The car, driving license
and young people, a
continuing story

Young people: a
pro-climate
generation?

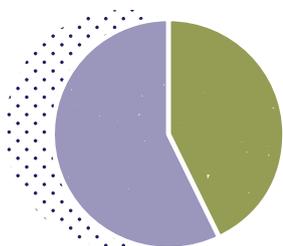
The place of the car throughout youth

Car use, as well as its image, is losing momentum. However, even among younger generations, cars seem to be holding their own and remain the main option when they enter working life: is this due to a lack of attractive alternatives? Or is it because urban planning is not adapted to alternative modes of transport?

Obtaining a driver's license remains an essential milestone for the majority of 18-29 year olds, even if some of them are postponing the age at which they take their test due to longer periods of study. Similarly, environmental considerations related to car use do not seem to influence this generation, especially since there is no specific "youth" sensitivity to ecology. Despite the difficulties of using public transportation for leisure, young people are aware of its advantages and disadvantages. While some choose to drive when they have the opportunity, they still make choices about their preferred modes of transportation: public transportation is preferred over walking and cycling, even in city centers.



Finally, vigilance towards young people (and young girls in particular) in public spaces, in order to address a (sense of) insecurity, encourages early and frequent use of cars (including by parents), to the detriment of public transportation. 



43% of 15-27 year olds
associate the word
pollution with cars,
compared to around
9% for public
transportation.

(Source : UTPF)

62 %

of 18-29 year olds cannot imagine
living their whole lives without a
car (same percentage as for
those over 30)

(Source : Observatoire Cetelem)

To go to school : Less walk, more car

For several decades, our territories have been designed for cars and around the car. The increasingly important place given to the car has been, among other things, to the detriment of pedestrians. Thus, in our Western societies, children have gradually disengaged from the outdoor urban space to become "indoor children." For example, to go to school, the car

has gradually replaced walking and cycling. According to a 2024 Keoscopie survey, fewer and fewer children are walking or cycling to school; around 50% for elementary school and 40% for middle school, which is 17 points less than their own parents, in favor of cars (+16 points).



To go to middle school,

42 %

of current middle school students report taking public transportation, a percentage close to that of their parents (when they were in middle school).

(Source : Keoscopie)

1 in 2 children

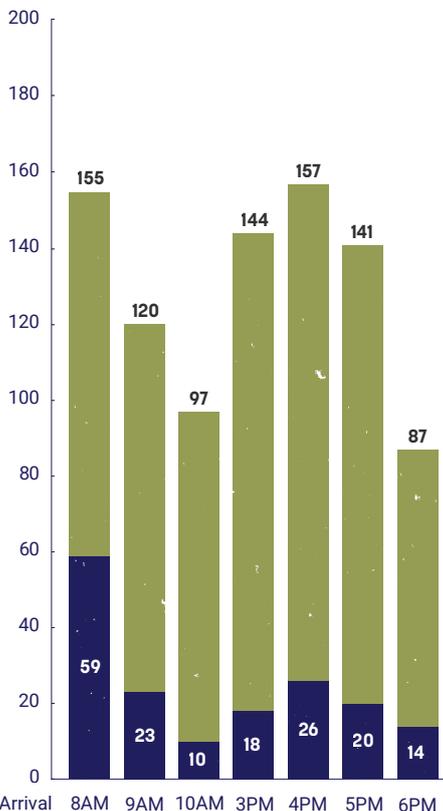
is driven to school, even for short distances (Source : Ademe)

What mode(s) of transportation do you use to get to middle school?

| | Kids (nowadays) | Parents (when they were in school) | Gap (in points) |
|------------------|-----------------|------------------------------------|-----------------|
| Public Transport | 42 % | 40 % | +2 |
| Walking | 34 % | 46 % | -12 |
| Biking | 5 % | 10 % | -5 |
| Personal car | 37 % | 21 % | +16 |
| Motorbike | 2 % | 3 % | -1 |

(Filter : couples with kids and single parents with kids)

Source : Keoscopie 2024



■ Average number of riders per day
■ Average number of individual riders across the month

(Source : Ademe)

Middle school and high school students also have irregular schedules

One of the first encounters with public transportation occurs when traveling to and from school. Like some working adults, middle and high school students also have varied schedules. Depending on the day, some start class at 8 AM, 9 AM or even 10 AM and finish outside of traditional school hours. And it is never the same students who are affected from one day to the next. On routes that are mainly used by students, offering a wide variety of schedules

During a month of observation, there are almost as many student subscribers who will have used the 8 AM route at least once (155 in the attached illustration) as there are student subscribers who will have used the 3 AM route (144). And even though the route arriving at 10 AM is not very busy on a daily basis (ten subscribers on average), almost 100 (97) used it at least once during the month. Few people on a daily basis does not mean few people affected.

For the public transport experience to be positive, it is important to provide solutions outside of the main school arrival and departure times. Otherwise, as soon as they can, young people will seek to avoid it, and do so on a long-term basis.

The car, driving license and young people, a continuing story

Is the personal car era completely over? Even though its image has fallen from its pedestal and it is probably less of a dream, it still remains synonymous with freedom for four out of ten young people. The rate of driver's license ownership among 25-30 year olds has changed little in 40 years. It is seen as a useful skill to have. In addition, parents' marked dependence on cars constitutes a decisive factor

in the influence they exert on their teenagers. Overall, parents see obtaining a driver's license as an opportunity to relieve themselves of the burden of driving their children to school or leisure activities. They also see the driver's license as essential for professional integration and as a response to one of their major concerns: their child's safety in public spaces.

92 %

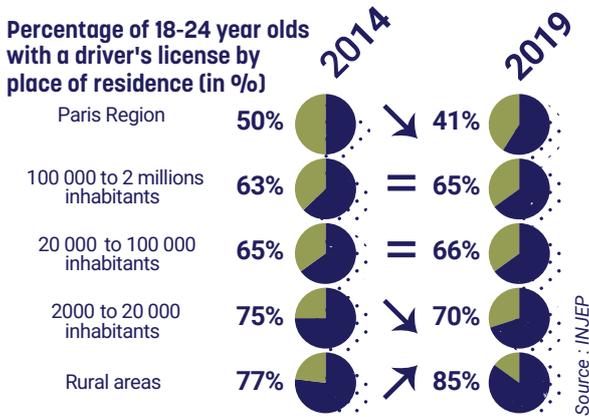
of 18-29 year olds have a driver's license and/or are considering getting it

(Source : Keoscopie 2022)

62 %

of 18-24 year olds feel a sense of pride in owning a car (compared to less than 50% of those aged 55 and over).

(Source : Ademe)



In 2008, in the "30-34 years old" age group, **91%** of the French population had a driver's license (compared to 88% in 1993).

(Source : Métropolitiques)

Among PT users, 15-29 years old are

Twice as many

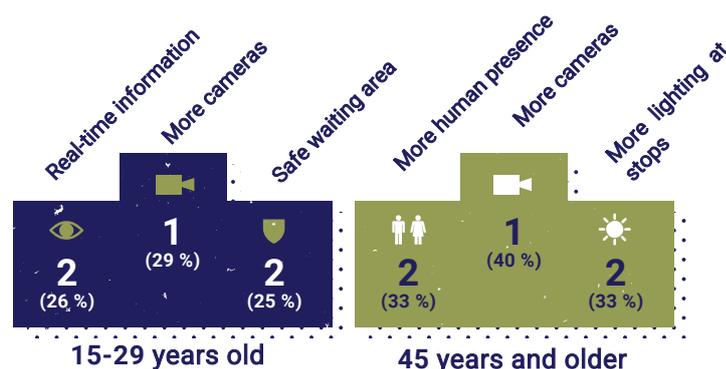
15-29 years old have changed their route or destination because of safety concerns compared to 30 years old and older

For **27 %** of 15-27 years old (source : UTPF), insecurity is a barrier to the use of public transport

Among following measures, which ones would you like to see implemented in priority to ensure safety in urban public transport?

Feeling unsafe on public transportation: a catalyst for future drivers?

In the Keolis study on "Gender and Mobility," participants all recognize a difference between female and male experiences of mobility, almost immediately mentioning the issue of insecurity on public transportation. This feeling of insecurity develops strongly during adolescence, a period when young people (both men and women) become increasingly independent. However, when it comes to public transport, young people have behaviors, expectations, and even tactics that differ from the rest of the population.



TOP 3 of wanted measures in PT

(Source : Keoscopie 2024)

Young people: a pro-climate generation?

The idea of a uniform youth, in total rupture with previous generations, is an illusion. Is the dream of individual home ownership outdated? 70% aspire to it. As for whether all our children are Greta Thunbergs at heart, only 28% of young people cite climate change as one of their top three priorities, behind health, purchasing power, and poverty. "Young activists" who are aware of environmental challenges are, however, very visible through their often highly publicized actions. But they represent only a small portion of the 18-29 age group (less than 20%). When asked directly, teenagers say they are concerned about environmental issues. However, in their daily lives, this does not really concern them: the only actions they mention are sorting waste.

For some, simply throwing waste in the trash (without sorting it) is enough of an eco-friendly gesture. Furthermore, they make very little connection between their mobility choices and environmental issues, even though they recognize that using a car can be more polluting than public transportation.



79%

of 18-29 year olds consider the fight against global warming to be urgent

(Source : Keoscopie)

4th

The fight against global warming ranks only fourth among the concerns of 18-29 year olds

(Source : Keoscopie)

Lessons learned and key recommendations



The image of fashion is forged from childhood. Every three years, high school students renew themselves. An opportunity not to disappoint them with our school transport offers.



Make young people co-creators of the services and transport offer provided, through permanent youth panels and user testing prior to launch, in order to benefit from their expertise and expectations



Supporting young people's independence and delaying the purchase of their first car, with solutions that take into account their diversity and lifestyle (evenings, weekends, holidays, for work-study students, those who live in two places, those who work, etc.).



For those who have a driver's license, promote complementarity with public transportation: combined park-and-ride + transportation season tickets, marketing that promotes "modal mix" rather than the opposition between cars and public transportation.



Enhance the sense of security in the network and public spaces (lighting, cleanliness, on-demand stops, human presence, staff training) to make the network welcoming rather than hostile.