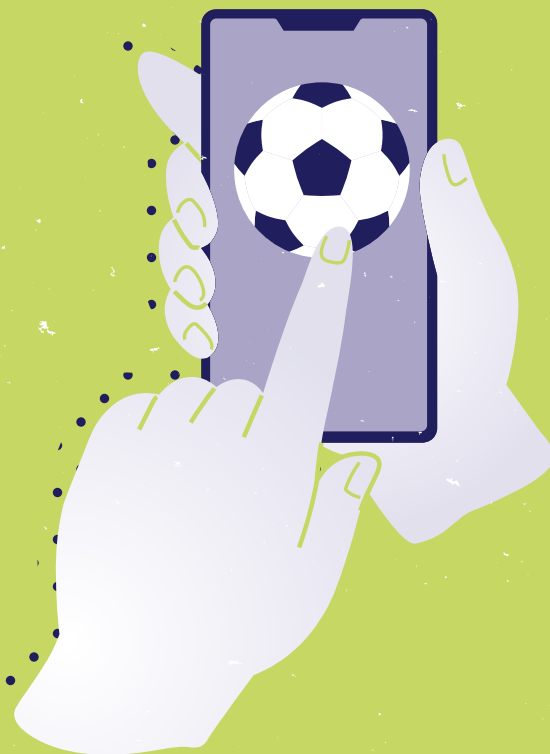


# DERRIÈRE LES APPARÉNCES

#9

OCTOBER 2025

## Kick-off to click-off



The use of digital tools for mobility is on the rise, as we know: from 35% of French people in 2010 who searched for routes using digital solutions, the figure has risen to 75% in 2025. But more specifically, which websites or apps do travelers use today for mobility? What are the top three mobility apps used in France? Does Google Maps dominate all uses? Are young people really ahead of the curve and older people lagging behind? What are travelers' expectations for new features? What role do social networks play?

These are all questions that we are attempting to shed light on through an online survey of 1,500 public transport users in different types of areas in France, including metropolitan areas (outside the Paris region) and rural areas, which refines Keoscopie's key findings on the French people's relationship with digital technology.

This survey also allows us to identify our strengths and the challenges we must address as an operator: capitalizing on the trust placed in official network websites and apps, ensuring the quality of passenger and traffic information, and supporting the digitization of passenger information to offer true mobility companions. While combining simplicity, reliability, and trust. The tone is set. 

KEO  
SCOPIE

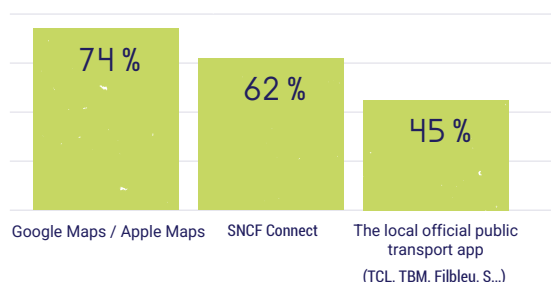
IMAGINING TOMORROW'S MOBILITY

## « It's Google Maps here, Google Maps there »

Unsurprisingly, Google Maps ranks **first among the most frequently used websites and apps for public transportation** (74%).

The conclusion is clear: "SNCF Connect is not Google. Transit is not Google. Citymapper is not Google. A local app isn't Google. Moovit isn't Google." But these apps are managing to gain significant market share to the Californian giant.

**The surprise is with the other two spots in this Top 3:**



A detailed analysis of the use of different websites and apps reveals some interesting points:

→ **The use of Google Maps is universal:** its use is virtually the same across all age groups and regions (72 to 77%).

→ **SNCF Connect**, thanks to its national coverage, ranks second (with 62% of users) and even makes a difference in rural areas (74%, ahead of Google). Its use needs to be clarified (daily mobility and regional modes or occasional nationwide journeys?).

→ The official mobile apps of transport networks come in a **strong third place**, especially in metropolitan areas (59%) and large cities (50%). Their use drops dramatically as population density decreases (39% in suburban areas, 35% in medium-sized cities, and 34% in rural areas).

→ There is a **reverse generational effect**: the older the user, the more popular the official network apps are (35% among 18-24 year olds, 45% among 50+ year olds, and 54% among 60+ year olds).

→ Finally, other mobility apps (Moovit, MyBus, Transit, Citymapper, etc.) are significantly less used (24% for MyBus, 14% for Moovit), and are mainly used in metropolitan areas and rural areas by younger respondents (18 to 35 years old).

## « Ready for kick-off »

As in a well-prepared game, travelers prioritize anticipation thanks to digital tools:

**73 % of respondents** consult websites or apps a few days before or the day before the trip

**74 % on the day of departure** before leaving home

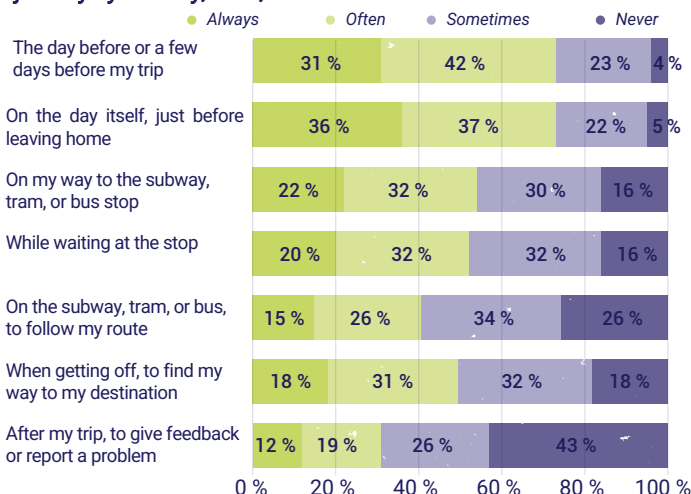
**54 % and 52 %** while going to the stop or waiting at the stop

Then, the further we go on the trip, the more usage drops: during the trip or afterwards, usage falls below 50%.

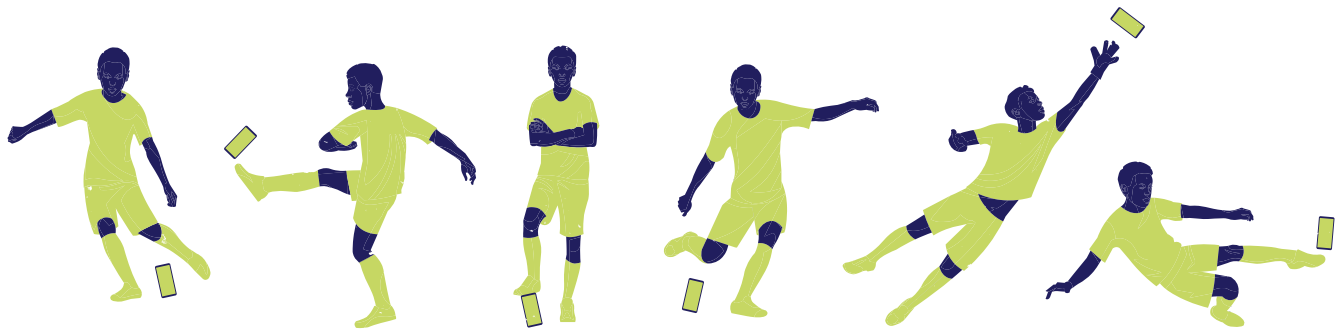
The younger the travelers, the more frequently they use these tools throughout all stages of their journey. For example, 80 to 84% of those under 35 consult a website or app all the time or often on the day of their trip, compared to 60% of those aged 60 and over.

*[reminder] This confirms the statistics observed in the use of Keolis network websites and apps: the three most frequently used features are timetable searches, route searches, and traffic information!*

### When do you consult a website or app to find out about your journey by subway, tram, or bus ?



Finally, it should also be noted that **the less densely populated the area, the greater the preparation** (76% in medium-sized towns and 83% in rural areas, vs. 64% in metropolitan areas). This confirms the need for reassurance when supply and frequency of visits are lower.



## «Teamwork Makes the (Digital) Dream Work »

Which app or website is used and at what point during the trip?

Travelers use several tools (on average 2.5 to 3 different tools) and the analysis confirms that their uses are truly complementary:

→ **Google Maps remains indispensable for route planning:** regardless of age or location, the search engine remains the benchmark. It is therefore also a real showcase for promoting the transport services offered by our networks.

→ **The good news:** official network apps/websites are the most widely used tools for real-time schedules, accurate information on disruptions, and practical information about the network.

→ In the event of disruptions (planned or unexpected): **official network channels remain the benchmark and are highly trusted.** 77% of travelers prefer traditional network channels (apps, websites, text messages, email), and 83% of travelers rate real-time information as very good to good in the event of disruptions (vs. 77% for Google Maps and 78% for other mobility apps).

## « Play Across all Channels »

**The network's official channels (website, app, SMS, email) are still the main reference:** when given the choice of channel for receiving passenger information, respondents overwhelmingly prefer the network's official channels. Among these, SMS remains in first place (40% of respondents want to receive information via this channel), followed by the app (35%) and the network's website (34%). To date, WhatsApp notifications remain rarely used (10%, as they are not widely available) and still not very popular (perhaps because they are not well known?).

Social networks are neither widely used nor popular for Passenger Information

Facebook, Instagram, X (formerly Twitter): these social networks are **less widely used** (12%, 11%, and 10% usage respectively) and **less popular** (18%, 17%, and 17% respectively) for receiving real-time information. They also enjoy **less credibility than the network's official websites and applications** (for example, only 22% of respondents consider Passenger Information on X to be of very good quality, while 10% consider it to be of very poor quality).

This confirms the recommendations on the use of different digital channels: **prioritize the website and app for passenger information and use social media (Facebook, Instagram, etc.) for commercial news, general communication, or image building.**

The use of SMS and WhatsApp remains a topic that needs to be explored further in order to understand travelers' attachment to SMS (a universal solution, accessible regardless of the type of phone) and to test the appetite for WhatsApp.



## « Raise your Game »

When offering travelers a choice of upcoming features to roll out: no gimmicks, just useful and tangible features.

**80 %** are in favor of real-time reporting by the community (like Waze)

**75 %** want personalized and targeted notifications

**71 %** want to be able to track vehicles in real time on a map (also in line with travelers' expectations to combat feelings of insecurity, particularly among 15-29 year olds (see Keoscopie Flash No. 7))

Other features during and after the journey (step-by-step guidance, notifications when approaching the exit stop, comfort/crowding indicators, etc.) are less popular.

In terms of channel preference, travelers remain loyal to familiar channels: SMS and email, with 86% and 61% interest respectively. Social media is clearly less popular (Facebook, Instagram, and X – 37%, 44%, and 54% not interested at all respectively). Innovative channels such as WhatsApp and chatbots are moderately appealing (55% and 46% interested, respectively).

In line with a greater focus on travel preparation, the most popular features relate to reassurance and the guarantee of a stress-free trip, via channels that travelers are currently familiar with.

**27 %**

of respondents do not use a website or app for their public transportation trips

**16 %**

of 18-24 year olds say they are non-users (only 5% because they are unfamiliar with these tools)



## « We are on a mission »

In line with Keoscopie's findings, certain paradoxes must be taken into account in order to offer a multi-channel passenger information strategy and meet the expectations of all our traveling customers.

Admittedly, 73% of travelers use a digital tool to get around on public transport: conversely, 27% of respondents do not use a website or app for these journeys (even though the survey was conducted entirely online). Eighteen percent are familiar with these tools but prefer other channels (maps, timetables at stops, agencies), and 9% are not familiar with these tools.

## Passenger information cannot therefore be 100% digital!

The divide is primarily generational: only 16% of 18-24 year olds say they are non-users (of which only 5% because they are unfamiliar with these tools), compared to 45% of those aged 60 and over (of which 16% because they are unfamiliar with the tools and 29% by choice). There is no significant difference based on the size of the territory. Furthermore, it should also be noted that some respondents do not wish to receive travel information (via push notifications), but prefer to look for it themselves:

→ In the event of a planned disruption, 27% of respondents say they do not want to receive information, and for those aged 18-24, the rate rises to 39%.

→ In the event of an unexpected disruption, 19% of respondents say they do not want to receive information (and 24% among 18-24 year olds). This may reflect a greater willingness among younger respondents to seek out information themselves, rather than receiving it automatically.



## « Step up your game »

### OPERATIONAL challenges



The official websites and apps of transport networks have nothing to be ashamed of when compared to other solutions: enjoying genuine trust, when these tools are deployed, they meet a key need for reassurance, both in preparation and in real time.

#### The operational challenges are therefore:

- Ensure the quality of theoretical and real-time passenger information, and capitalize on the trust placed in the network;
- Deploy websites and apps, particularly in less densely populated areas, and promote them: without this, third-party solutions will take over the market, leading to reduced passenger confidence in the quality of information and therefore impacting the image of the network itself;
- Work in tandem with Google Maps, which remains a natural entry point, particularly for occasional passengers.
- Among the upcoming features expected, certain features that have become standard in other tools (deliveries, taxis) are expected by public transport passengers: real-time vehicle tracking on a map, personalized notifications, reports by the passenger community: all designed to ensure a smooth journey.

#### Among the various channels available for passenger information:

- Prioritize transportation network websites and apps for real-time information and disruption alerts.
- Do not use social media for real-time traffic information: travelers do not expect this type of information there.
- Experiment with innovative channels, such as conversational chatbots or WhatsApp, and work on their deployment to test their appeal compared to traditional channels (SMS, email).

The challenge for networks is to roll out genuine multi-channel passenger information strategies, where digital technology can provide real digital assistants capable of reassuring, anticipating, and supporting every user, regardless of their age or location, on a calm, personalized, and controlled journey.