

Everywhere the same, nowhere identical: Keolis unveils groundbreaking study on global mobility expectations



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For nearly twenty years, the Keolis Group has been observing, analysing and anticipating changes in mobility through its lifestyle observatory, Keoscope. This initiative documents evolving user patterns, territorial profiles and the specific challenges unique to each local community.

In this latest edition, Keolis reveals the insights from an international analysis of unprecedented scale, conducted in conjunction with the Toluna institute among 8,000 residents across 20 metropolitan areas and 11 countries.

The findings deliver a clear verdict: all over the world, citizens express the same fundamental expectations regarding public transport—more affordable, more frequent services and safer networks—yet their usage remains deeply shaped by their living contexts and local expectations.

> Shared aspirations in every community

From Sydney to Stockholm and from Montreal to Hyderabad, respondents share a common set of expectations for public transport, structured around three priorities:

#1

More affordable
transport

#2

More service
provision

#3

Increased safety and
security on board and
around networks

This convergence of views is noteworthy: in most of the countries studied, passengers prefer lower fares for everyone over entirely free transport, in the belief that service quality must remain the top priority.



> Local specificities reshaping priorities

Beneath this apparent homogeneity, the study highlights major local differences linked to culture, mobility history and the urban fabric:

- In North American and Australian metropolitan areas, where nearly 9 out of 10 passengers use a car several times a week, up to **30% of residents prioritise improving driving conditions and increasing the number of parking spaces**.
- Conversely, in Scandinavian cities such as Gothenburg or Stockholm, this requirement drops to 19%, with expectations focusing instead on **the continuous improvement of public transport**.
- In Northern Europe, **fare regulation and safety** are structural concerns.
- In South Asia, the need for **services available across extensive operating hours**, including weekends, proves particularly strong due to longer working schedules.

These contrasts serve as a reminder that the same transport service carries different implications from one continent to another: mobility is inherently local.

> Fragmented working patterns that deeply affect patronage

The study shows that the "traditional" Monday-to-Friday working week is no longer the norm in most countries and regions:

- Fewer than one in two workers follow this model.
- In Hyderabad or Pune, a significant proportion of the workforce reports working 7 days a week.
- On average, 40% worked at least one weekend day.
- More than 70% started or finished their working day outside peak hours at least once during the week (Monday to Friday).

Mobility is now required continuously, all day long and throughout the week. Everywhere, there is one clear requirement: networks must remain attractive and accessible, even outside traditional peak hours.



Keolis Bordeaux Métropole © Pascal Calmettes

> A sense of insecurity that weighs on the travel experience

Safety emerges as a major issue, with varying degrees of intensity depending on the region studied:

- On average, 8 out of 10 passengers have applied at least one **avoidance strategy** (altering a route, letting a loved one know before setting off, avoiding certain times, etc.).
- The 18–24 age group, despite being the most frequent users, are also the most vulnerable: 94% report having implemented **protective strategies** at least once over the past 12 months.
- In Boston, one in two residents has given up on making a journey over the past 12 months out of concerns for their safety.
- In Brussels, 58% have already changed their route due to feeling unsafe.

These data points demonstrate that perception is just as decisive as objective reality, and that it varies significantly according to urban cultures.

> Similar vulnerabilities, but tailored responses required

Certain difficulties are experienced everywhere:

- **88%** of passengers have had to stand during a journey at last once in the past year.
- **76%** have struggled to find their stop in an unfamiliar environment.
- The absence of toilets at transport hubs emerges as a major irritant across all cultures, affecting both women and men, young and old alike.

Other vulnerabilities are more discreet—such as arthritis, anxiety and chronic conditions—and affect travelling to varying degrees depending on the region.

Global population ageing will make these issues even more critical in the coming years.

Added to this is a highly localised digital divide: while 83% overall believe that digital technology simplifies their travel, as many as 52% of people in Hyderabad state they have abandoned a journey due to a lack of digital literacy.

> Three levers to build universal... and local mobility

The study identifies three areas of action applicable everywhere, but which must be tailored to the realities of each city.

Below are examples illustrating how Keolis deploys these levers across the networks it operates in France and around the world.

- **Lever 1 – Improving the customer experience by addressing common bugbears (Overcrowding, passenger information, essential amenities)**



Hyderabad & Dubaï

Artificial intelligence and crowd prediction are transforming metro operations to continuously adapt to passenger numbers, station by station. By reducing waiting times and improving onboard comfort, these technologies mark a turning point for urban mobility. Rider Predict, a tool developed by Keolis teams, demonstrates this advancement with a 96% prediction accuracy rate.

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Besançon

Real-time information on bus and tram crowding along with forecasts for the coming days allow passengers to reschedule their journeys and travel in comfort.



© jack varlet



Bordeaux

Customer insights rely on a multichannel approach: listening tools, regular satisfaction surveys (seven surveys planned in 2025, complemented by over 15 ad-hoc thematic surveys), AI-assisted qualitative analysis and monitoring feedback on social media, blogs and press coverage. This integrated approach helps identify components of customer satisfaction, detect and correct friction points and capture weak signals of shifting trends.

- **Lever 2 – Strengthening human presence. A genuine factor of reassurance, particularly during off-peak hours or at difficult connection hubs**



Lille

Since 2012, an Information Control Centre (PCI) has provided continuous coverage of the Ilévia network, 7 days a week. A team of 17 agents continuously manages passenger information and handles calls from metro and tram help points. This system is also backed by an enhanced field presence, with more than 80 "Welcomers" deployed across the entire network.



London

The DLR Community Assist programme redefines the role of transport operators on the Docklands Light Railway (DLR). By accompanying vulnerable passengers, it helps them regain confidence and learn how to travel alone. Through strong partnerships and close attention to the real needs of users, this initiative boosts public transport accessibility and fosters social inclusion in East London communities.



Manchester

To combat fare evasion more effectively, KeolisAmey Metrolink has increased the number and visibility of its revenue protection officers on the ground. Beyond the goal of reducing fare evasion, this extra personnel helps guide and reassure customers regarding the correct use of the network.

- **Lever 3 – Maintaining a continuously attractive service, adapted to profoundly changing daily routines**

Almere (Netherlands)

The allGo bus lines in Almere, Netherlands, begin running before 5:00 am on weekdays (slightly later at weekends) and operate until past midnight every day of the week. During the day, from Monday to Sunday inclusive, buses run at high frequencies (several times an hour) late into the evening, as well as early in the morning.

Châteauroux

At the SEMA (Autonomous Mobility Test Site), Keolis is currently finalising real-world trials of autonomous shuttles. From September, an eight-seater electric shuttle will run in the town centre, alongside normal road traffic, with several services per hour.



Orléans

Since 2025, the RésaNuit service has provided comprehensive coverage across the metropolitan area's 22 municipalities, every day from 9:30 pm to 6:00 am. This dynamic on-demand transport service, unique in France, uses 9- and 20-seater vehicles and is open to passengers holding standard network tickets or travel passes.

Bourgoin-Jallieu

To cater to the variable working hours of employees in the Chesnes logistics zone (the premier inland logistics hub in France and the third largest in Europe), the Flexibus and Ruban Nuit services complement regular lines. They provide detailed, tailored coverage 24 hours a day, from Monday to Saturday, benefiting a total of more than 360 companies in the Porte de l'Isère area.

About Keolis

Keolis is a pioneer in the development of public transport systems and partners with public transport authorities to deliver shared mobility services that enhance liveability for local communities. As a world leader in the operation of automated metro, tram systems and heavy rail, Keolis transports 9 million passengers every day and draws on a potent and open innovation policy with all its partners and specialist subsidiaries - Cykleo, EFFIA, Keolis Santé and Kisio- to support its core business and develop new, innovative and bespoke shared mobility solutions for modes including trains, buses and coaches, trolleybuses, on-demand transport, services for people with reduced mobility, river and sea shuttle services, bike share services and long-term rental, car sharing and all-electric driverless shuttles. In France, Keolis is the second largest provider of parking management solutions through its subsidiary EFFIA, and the country's leader in medical transport since the creation of Keolis Santé in July 2017. The Group is 70%-owned by SNCF and 30%-owned by La Caisse (formerly CDPQ) and employs 68,000 people across 13 countries*. In 2025, it posted revenue of €7.1 billion.

*Keolis is historically established in France and has additionally developed operations in Australia, Belgium, Canada, China, Denmark, India, the Netherlands, Qatar, Sweden, the United Arab Emirates, the United Kingdom, and the United States.

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