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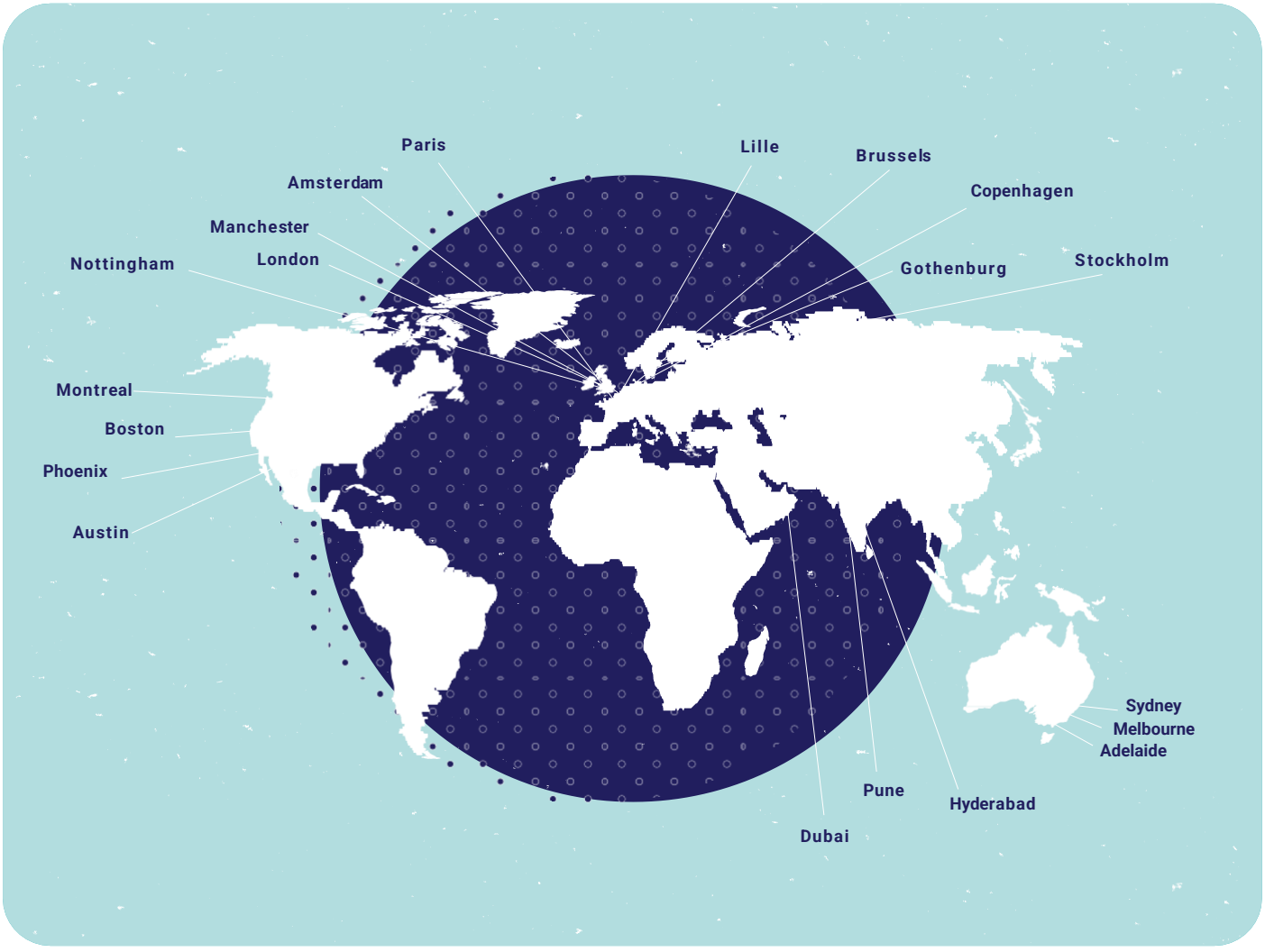
KEOPLANET SCOPE
A WORLD IN MOTION

The unsuspected global consensus on mobility



8,000 residents **20** metropolitan areas **11** countries

From Sydney to Stockholm, from Montreal to Hyderabad

KEOSCOPIE
IMAGINING TOMORROW'S MOBILITY

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Foreword

A fascinating portrait of mobile humanity

Some insights can only be revealed through international comparison. This is one of them: everywhere on the planet, whenever citizens are asked what they expect from their everyday transport, the answer emerges with an almost unsettling consistency. More public transport options, more affordable fares, better safety. This triptych holds true in Amsterdam and Hyderabad, Stockholm and Montreal, Brussels and Boston - as if a single voice were crossing continents, cultures and the most diverse transport systems.

It is this unsuspected consensus that the 2026 Keoscopie international survey, conducted in partnership with Toluna, has had the merit of bringing to light. Carried out among 8,000 residents across 20 metropolitan areas in 11 countries - from the Netherlands to Australia, from Sweden to India, from the United States to the United Arab Emirates - it is one of the most ambitious investigations ever undertaken into the mobility expectations of citizens around the world. The picture it paints is both reassuring and demanding: reassuring because it reveals that mobility challenges are neither unsolvable nor confined to a few disadvantaged areas; demanding because it compels us to face realities that daily routine tends to normalize.

8,000
respondents worldwide

11 countries
20 metropolitan areas surveyed

This document is organised around the four major themes that structure the international "Beyond Appearances" collection. The first explores expectations regarding mobility policies, revealing the depth of the global consensus around public transport. The second examines the fragmentation of working schedules and its direct consequences on transport demand. The third draws a global portrait of the sense of insecurity on public transport, a decisive factor constraining the mobility of millions. The fourth sheds light on the everyday vulnerabilities of passengers and the transformative power of well-designed small improvements.

The findings of these four dimensions converge toward a single conclusion: transport operators worldwide today have access to a genuine atlas of the lived experience of passengers. An atlas that, for the first time, speaks with one voice. It is this voice, in all its diversity and nuance, that this publication aims to convey.

METHODOLOGICAL OVERVIEW

Scope: 11 countries — Belgium, Netherlands, Denmark, Sweden, UK, Canada, Australia, USA, UAE, India, France

Metropolitan areas: Brussels, Amsterdam, Copenhagen, Stockholm, Gothenburg, London, Manchester, Nottingham, Montreal, Adelaide, Sydney, Melbourne, Austin, Phoenix, Boston, Dubai, Hyderabad, Pune, Paris, Lille

Field: Online quantitative survey, 400 respondents per metropolitan area, socio-demographic representativeness guaranteed , conducted in 2025–2026

Partners: Keoscopie (Keolis research programme, 20 years of mobility expertise) × Toluna (international panel)

Chapter 1

What citizens want

From Sydney to Stockholm, a single conviction: making public transport better, more affordable and safer

Imagine for a moment that every resident in your city were to take the place of its chief executive for mobility and draw up their ideal roadmap. What would emerge? The international Keoscopie survey delivers a strikingly clear answer: everywhere in the world, with almost no exceptions, improving public transport tops the list of priorities.

This convergence - among cities as diverse as Amsterdam, Hyderabad, Austin and Gothenburg - is one of the most structurally significant findings of the entire study. It suggests that hopes placed in public transport transcend cultural, economic and infrastructural differences. It also raises a critical question: why does this universal consensus still struggle to translate into public policies capable of fully meeting these expectations?

Public transport from the inside

Ask someone to describe buses or trams in one word, and the first term that comes to mind, everywhere in the world, is ”convenient.” In the survey, convenience and accessibility account for most positive responses spontaneously associated with urban public transport. This is not an expected answer - it is a genuine acknowledgment: the network, when it works, is perceived as a valuable, integrated, nearly indispensable everyday tool.

This positive image nonetheless coexists with a very real tension. While convenience is dominant in spontaneous associations, overcrowding also ranks among the most frequently mentioned words. This is the downside of attractiveness: a well-liked network is a heavily used one, and when ridership exceeds vehicle capacity, it turns against the service’s image. The ‘affordable versus expensive’ balance remains broadly favourable to public transport, perceived as a cost-effective alternative to the car, but this perceived advantage erodes whenever service quality declines.

This fundamental paradox - a mode of transport that is liked but often shunned due to insufficient quality - runs throughout the entire survey. It explains why citizens around the world, when asked how to improve their mobility, do not reject public transport but demand more and better service. This is not a lack of confidence in the mode itself: it is a demand directed at those who operate it.

> “The network, when it works, is recognised as a practical everyday tool. This is not an expected answer — it is spontaneous endorsement.”

A world speaking with one voice

Three priorities that transcend continents

Among the range of measures proposed to respondents (from expanding public transport services to reducing road traffic, along with lowering fares, improving cycling infrastructure and facilitating parking) the global top three choices are remarkably similar from one country to the next. Reducing the cost of public transport consistently comes first, followed by increasing services, then measures to improve on-board safety. This triumvirate structures the global public mobility agenda with a consistency that defies local particularities.

In Paris as in Gothenburg, in Montreal as in Amsterdam, voices converge around a single conviction: making public transport better, more affordable, and safer. In India, notably, the priority shifts slightly: safety there outranks the fare question, reflecting usage realities and perceived risks that differ from those prevailing in European or North American metropolitan areas. But the nature of the concerns remains the same.

What this consensus reveals is that citizens around the world are not asking for infrastructural revolutions or spectacular technological innovations. They are asking for well-maintained fundamentals: a network that adequately covers the community, fares that exclude no one, and a public space where people feel safe. These expectations are neither naive nor demagogic: they reflect a daily experience that has brought to light the limitations of current systems.

Where the car still reigns

The picture is not uniform. In regions where the car remains dominant (Australia and the United States leading the way) priorities shift toward more automobile-friendly policies. Up to 30% of residents in Melbourne or Boston call for easier driving conditions and more parking facilities, compared to only 19% in Gothenburg. Reducing fuel costs receives 25% of votes in Australia and the United States, versus only 13% in Copenhagen.

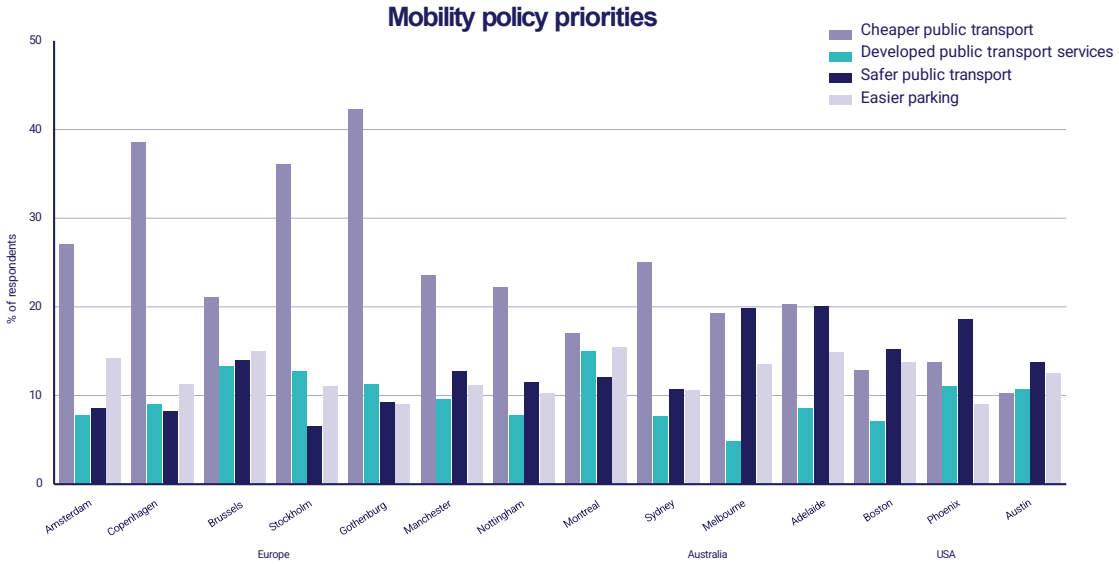
These differences do not constitute an exception to the consensus: they reveal its conditions of existence. In cities where nine in ten people drive their car several times a week, public transport is still perceived as a marginal alternative, reserved for those who have no other choice. The demand for automobile amenities expresses less an ideological preference for the car than a structural dependency built over decades of automobile-oriented urban planning. Where public transport is heavily used (Scandinavia, Benelux) the demand for expanding public transport services reaches 52% of allocated hypothetical budgets, compared to 36% in the United States.

30%

of Bostonians and Melburnians prioritise driving conditions and parking facilities

52%

of the transport budget allocated to public transport in Sweden



Urban mobility policy priorities by city -14 metropolitan areas, Keoscopie 2026 survey

The question of free public transport

Fully free public transport is an appealing idea on paper, regularly raised in public debate. The survey provides a nuanced response, even a partial refutation. In the majority of areas studied, rather than entirely free transport, the preference is for lower fares for everyone – for example, for nearly one in two residents in Copenhagen, Manchester, or Stockholm. In Paris as in Gothenburg, it is modulated affordability, rather than absolute free service, that garners the most support.

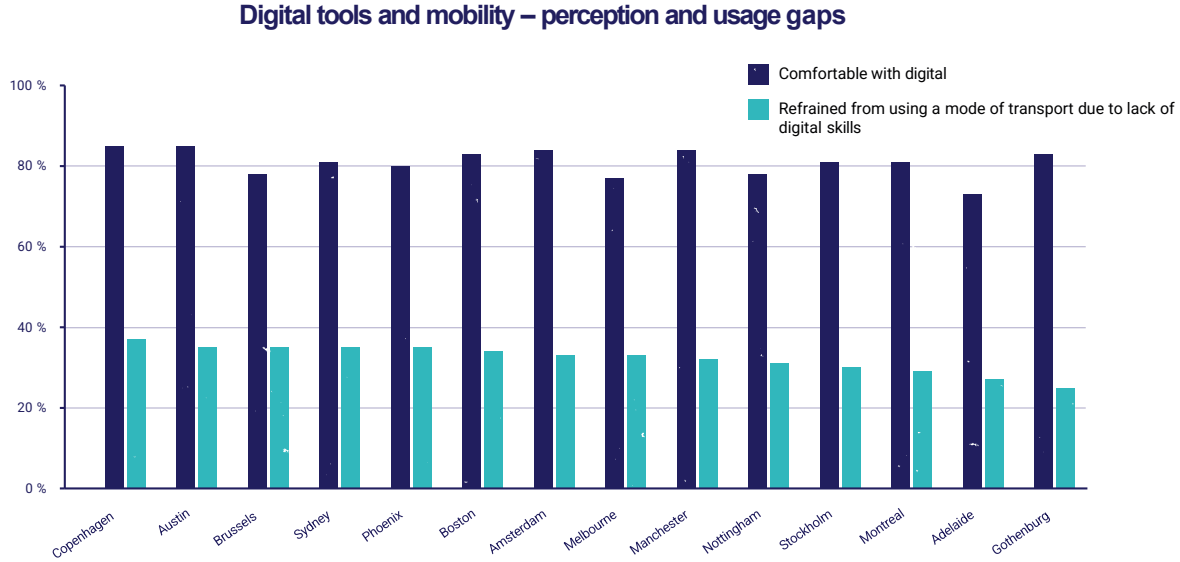
This finding echoes a Keoscopie study conducted in France in 2025, which revealed that more than one in two French people (53%) express concerns about implementing free public transport. These concerns centre on three main points: deterioration of service quality, an increase in antisocial behaviour or on-board insecurity, and overcrowding. This is not a rejection of collective transport: it is a quality requirement. Citizens intuitively understand that what costs the passenger nothing may cost the community a great deal, and that this cost may ultimately be paid in terms of poorer service.

Amsterdam and Brussels stand out as notable exceptions, with a significant proportion of supporters for publicly funded free transport. These cities have specific characteristics: high urban density, high-performing networks, and a deeply ingrained public transport culture. Their example illustrates that free service can be viable, provided it is preceded, not replaced, by service excellence.

> “Rather than full free transport, the preference leans toward lower fares for all: nearly one in two residents in Copenhagen, Manchester, or Stockholm.”

Digital technology: enabler or barrier?

Digital transformation has profoundly changed the mobility experience for the majority of passengers: more than 80% of respondents in all regions studied believe that digital solutions simplify their journeys and influence their mode choices. More than 60% even say it would be difficult to do without them for planning their trips. The navigation app, online ticket purchasing, real-time travel information: all these tools have become pillars of daily mobility everywhere in the world.



Digital tools and mobility : Perception vs. usage gaps by metropolitan area, Keoscopie 2026 survey

Yet this widespread adoption coexists with a form of silent exclusion. Nearly one-third of respondents admit to having refrained form using certain modes of transport due to a lack of digital skills. This figure, whose global version is in itself alarming, rises to 52% in Hyderabad and 38% in Copenhagen and Dubai. The digital divide in mobility respects neither geographic borders nor generations: 40% of 18–24-year-olds surveyed report having abandoned certain transport options due to insufficient digital proficiency, more than those aged 65 and over (21%).

This paradoxical reality is partly explained by the nature of younger users' digital habits: comfortable with social media and entertainment, they are less experienced with formalised mobility procedures (ticket purchasing, multimodal route planning, managing subscriptions). It reveals above all that the design of digital mobility interfaces has not always been developed with all user profiles in mind, and that user support remains a necessary investment that is insufficiently deployed.

A sense of insecurity: everyone's concern

Among the 8,000 residents surveyed, eight out of ten public transport users have adopted, over the past twelve months, at least one strategy to cope with a sense of insecurity. This is not the behaviour of an anxious minority: it is the ordinary reflex of daily mobility. Letting a loved one know before getting on a means of transport, appearing occupied with earphones or a phone to avoid unwanted contact, avoiding certain routes or times: all these silent adjustments paint the portrait of a passenger in a state of permanent vigilance.

Contrary to stereotypes, it is not only women who organise their mobility around the sense of insecurity. The survey reveals that 85% of women and 81% of men have applied at least one avoidance strategy over the past twelve months. The gap exists, but it is far less pronounced than might be expected. However, the generational dimension is striking: 94% of 18–24-year-olds admit to the use of avoidance strategies during the year, compared to 67% of those over 65. Young people, often presented as the biggest users of public transport, are also those with the most apprehension about it.

This paradox - heavy use, heavy anxiety - calls into question the current ability of transport networks to create a sense of security for their most frequent users. In Boston, one in two users has already refrained from a trip for safety reasons over the past twelve months. In Brussels, 58% have altered their route. In Pune, 63% have avoided taking public transport in favour of another mode. These figures do not describe objective insecurity: they describe the perception of insecurity, and this perception shapes behaviour with as much force as reality itself.

8 out of 10

public transport users have adopted an avoidance strategy over the past 12 months, across all surveyed countries

Taking action: turning insight into leverage

This international survey outlines a remarkably consistent field of action from one country to the next. Several major areas of improvement emerge, each capable of producing immediate effects on network appeal.

e Promote and enhance the image of urban public transport: the convenience argument is recognised and must be cultivated. This requires directly tackling the irritants that harm this image (overcrowding, irregular service) and deploying real-time passenger information tools.

e Address concrete inconveniences ambitiously: the absence of toilets in transport hubs, inadequate signage and uncomfortable standing areas are top-tier irritants reported by a majority of users of all ages. Resolving them is first and foremost a matter of political will and planning.

e Make lived safety a visible priority: increase human presence during sensitive hours, create identifiable contact points and launch campaigns that normalise the desire to feel safe.

e Design truly universal digital interfaces: invest in simplified purchasing journeys, interfaces accessible without advanced digital prerequisites, and consistently maintain human alternatives at every digital step.

e Engage in the debate on price and value: demonstrate that affordability can accompany quality service, not undermine it.

The journey as an everyday ordeal

Beyond mobility policy issues and the sense of insecurity, the survey documents a less spectacular but equally revealing reality: the everyday difficulties of travel. There is a scene that almost everyone knows, regardless of the city they live in: boarding a packed bus or metro train, standing, holding onto a bar, for the entire journey. This commonplace experience is, by far, the most frequently encountered difficulty in public transport. In Brussels, 94% of users have faced it at least once in the past year; in Montreal, 92%.

Beyond standing trips, 76% of users worldwide say they have already had difficulty finding their stop in an unfamiliar location : a figure that calls into question the overall effectiveness of signage and passenger information. This navigation difficulty is not a problem of individual competence: it is a design problem. Signage systems designed for users who already know the network leave new users, tourists, and all those whose usual route is one day disrupted in a state of confusion.

But beyond all the difficulties encountered, it is the absence of public toilets at major transport hubs that concentrates the highest and most consistent level of discomfort across ages and cultures. This figure persists across generations: 51% of 18–24-year-olds, 55% of 25–34-year-olds, and 43% of those 65 and older report discomfort from this absence. It is hard not to see in this the expression of an unmet basic dignity, a discomfort that does not age, that affects women and men alike, and that points to what might be called the ”anthropological fundamentals” of travel.

COUNTER-INTUITIVE:
Younger users report the most discomfort

18–24-year-olds and **25–34-year-olds** consistently top the list of reported difficulties, surpassing seniors on almost every item. This may reflect higher expectations from this generation, accustomed to smooth and immediate interfaces, when confronted with infrastructure that has not evolved at the same pace. Women report slightly more pronounced discomfort than men on most items (particularly fear of falling and difficulty navigating) a sign that networks remain insufficiently designed from the perspective of the most vulnerable female users.

| Chapter 2 |

Scattered schedules require continuous service

The working week is assembled "à la carte" — and with it, all mobility demand

There is one assumption that transport planners have long taken for granted: that passengers travel primarily during morning and evening rush hours, from Monday to Friday. This assumption had already been challenged by changes in working rhythms in recent decades. The 2026 Keoscopie international survey delivers it a decisive blow. In the 20 metropolitan areas studied, the "regular" working week (five days, Monday to Friday, at traditional hours) is an exception that is increasingly becoming a minority pattern, and in some parts of the world, a statistical fiction.

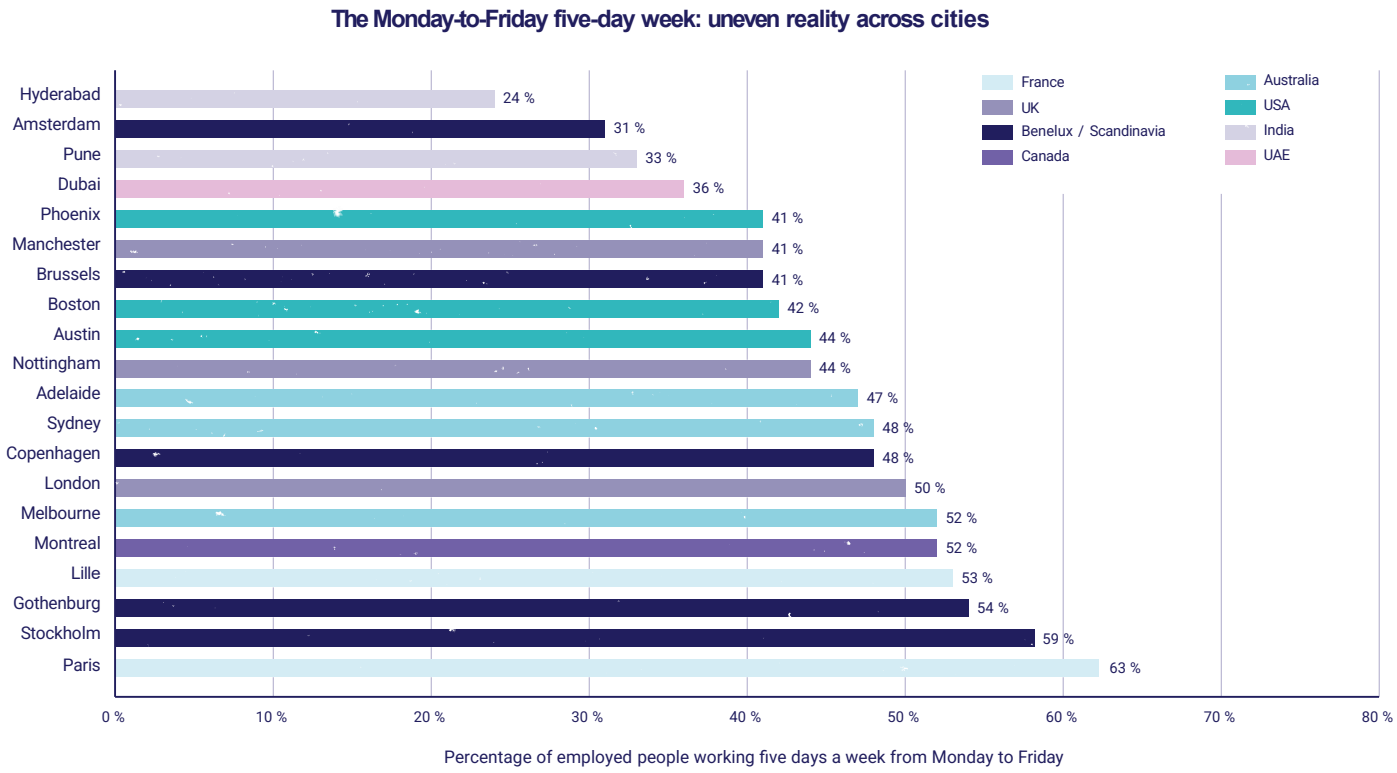
This fragmentation of work schedules is not incidental for transport operators: it fundamentally redraws the map of mobility demand, hour by hour, day by day, throughout the year. A transport service offer designed solely for morning and evening peaks, Monday to Friday, now leaves a growing proportion (and potentially the majority) of actual trips in a blind spot.

The 5-day week is not universal

The working week concentrated into five days, Monday to Friday, often presented as the norm in Western countries, does not hold up against international data. During the surveyed week, the share of working respondents reporting that they work these five days ranges from 31% in Amsterdam to 63% in Paris, with significant values in between: 41% in Brussels, 50% in London, 52% in Montreal. In the vast majority of areas studied, fewer than one in two active workers follows the pattern habitually referred to as "traditional."

The geographic contrasts are striking. In Dubai, where the official work week has been from Monday to Friday since 2022 (replacing the Sunday-to-Thursday model inherited from Islamic tradition) only 36% of workers fit this profile. In India, in Hyderabad and Pune, more than 40% of active respondents report working seven days a week. These realities go beyond simple cultural differences: they draw geographies of work that impose radically different geographies of mobility.

Beyond the averages, the distribution of combinations of days worked reveals even greater diversity. Some workers work five days but include at least one weekend day; others work full-time or part-time over just three or four days; some alternate week by week, depending on professional or family constraints. This mosaic of practices transforms mobility demand across the entire week, far beyond the well-trodden patterns that have long guided the construction of timetables.



Percentage of employed people working five days a week from Monday to Friday - 20 metropolitan areas, Keoscopie 2026 survey

The weekend in continuous service

The weekend in the Western sense (Saturday and Sunday) is not a sanctuary of rest. On average across the surveyed areas, 40% of working respondents report having worked at least one weekend day during the observed week. But this figure masks very contrasting realities across different parts of the world.

European and Canadian countries fall in a range of 20% to 45%: Brussels shows the highest proportion among the European countries studied (45%), followed by Amsterdam (39%) and Copenhagen (35%), while Paris and Lille remain below 26%. In North America, US cities stand out with higher rates, from 44% in Boston to 49% in Austin. But it is in Asia and the Middle East that the figures are most striking: in Pune, 64% of workers worked at least one weekend day, and Dubai is not far behind at 59%.

In detail, Saturday remains more frequently worked than Sunday, but the latter is far from marginal. In Amsterdam and the American cities studied, about a third of workers worked on Sunday. These practices have direct and immediate effects on mobility: a transport service proposition designed primarily for weekdays would miss a substantial share of actual mobility, forcing a significant fraction of workers to resort to their personal vehicles.

40%

of workers worked a weekend day during the surveyed week (average)

64%

in Pune —the highest rate in the survey

This trend is part of broader economic dynamics at play over recent decades: the shift toward a service economy, the growth of retail and personal services, the rise of flexible employment contracts. These transformations push a significant share of the active population to work at least occasionally on weekends, particularly in retail, hospitality, transport and healthcare. According to Eurostat, more than 20% of people employed in the EU habitually work on weekends, a figure that rises to 46% for self-employed workers.

Rush hour is not all there is

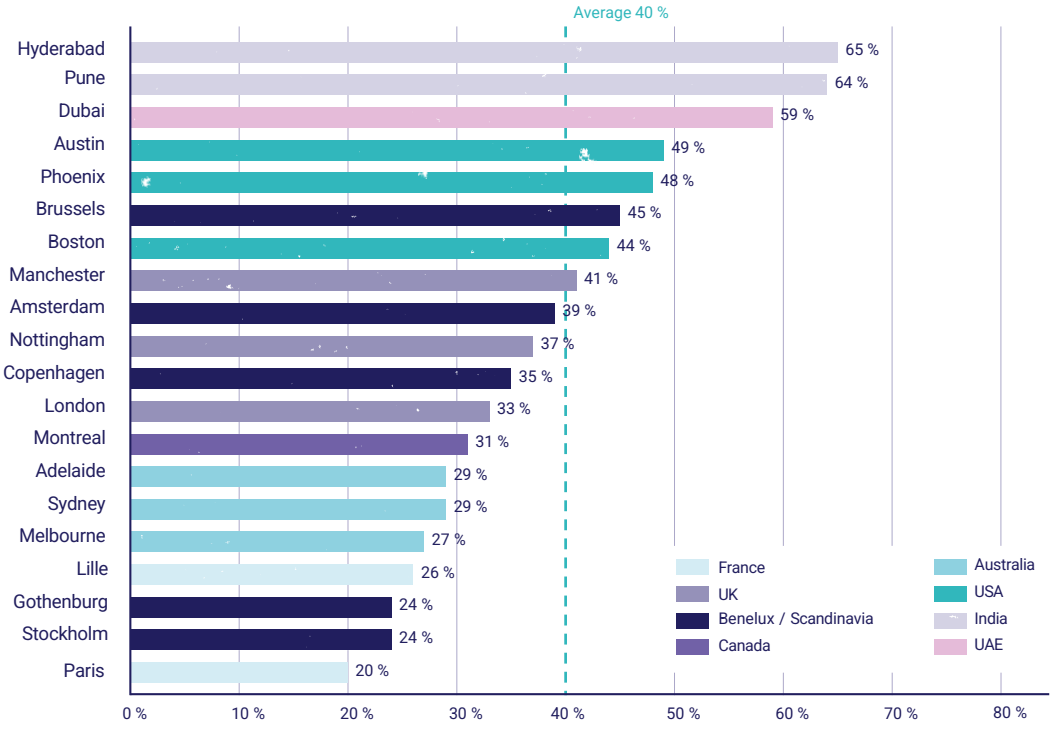
Working days no longer follow the dictates of two peaks alone. On average across the studied communities, more than 7 in 10 workers started or ended their day at least once during the week outside the time windows traditionally defined as 'rush hours.' Only 28% of workers always started and ended their workday within conventional time slots. Nearly one in five workers never passes through these slots: proof that schedule dispersion is structural, not the exception of a minority.

The geographic contrasts on this point are striking. While Sweden and France show the lowest proportions of workers who started or ended their day outside rush hours at least once (60%), India and Dubai reach rates exceeding 80%. In these countries, fewer than one in five workers has their entire day framed by traditional time slots.

A statistical nuance deserves particular attention: the percentage of workers ending their workday after 7 pm on any given evening considerably underestimates the number of people affected over an entire week. In Paris, for example, only 15% of workdays end after 7 pm. But during the week observed, approximately twice as many workers finished their day at least once after 7pm than the day data suggests. Few people at any given moment does not mean few people affected over the course of a week - and it is this cumulative reality that timetables must integrate.

> "Only 28% of workers always started and ended their workday during traditional rush hours. Schedule dispersion is not the exception — it is the norm."

Weekend work: from 20% to 65% depending on the region



Weekend work: share of employed persons affected by city - Keoscopie 2026 survey

Part-time work: women over-represented

Part-time work has established itself everywhere as a quiet pillar of work organisation. It represents proportions close to 20–30% in cities like Melbourne, Boston, or Amsterdam, while the Middle Eastern and Asian cities studied fall below 15%. Present in all regions, it remains primarily a strong gender marker: women hold significantly more part-time positions than men in every city studied.

In Adelaide, nearly one in two women works part-time, compared to one in four men. In Amsterdam, one-third of women are part-time, versus nearly three times fewer men. Stockholm is an exception, with almost as many men as women affected. These disparities are reflected at the national level: the average proportion of women working part-time in the European Union in 2024 amounted to 30% - versus 8% of men (Eurostat). In the United States, of the 22% of part-time workers, 59% are women.

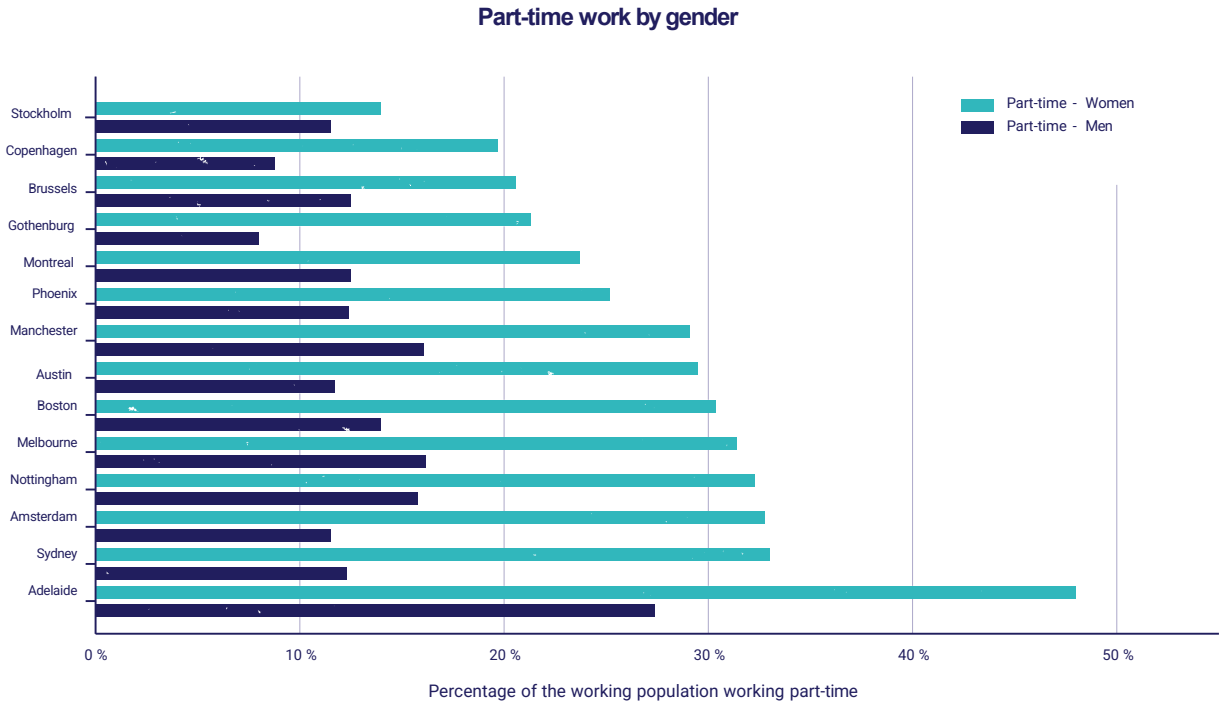
On the mobility front, part-time work translates into fragmented journeys: outbound and homebound trips spread throughout the day, early in the morning, late at night, sometimes on weekends. These commutes spread throughout the day, far from the peak hours alone, and represent a diffuse demand that transport networks designed for concentrated footfall flows struggle to cater to effectively. This is also an equity issue: a transport service provision that does not cover atypical hours structurally penalises part-time female workers who are already economically disadvantaged.

Remote work: a widespread model, but don't overlook the majority

Remote working, while it does not eliminate physical presence at the office, has become widespread in the large cities studied. Across the 20 metropolitan regions in the survey, between 20 and 50% of workers worked remotely at least one day between Monday and Friday during the surveyed week, with an average of 2 to 3 days per week. Women work from home slightly more than men (42% versus 36%). London, Amsterdam, and Brussels lead the pack with nearly one in two people working remotely; Dubai stands out with the lowest rate in the survey, at only 20%.

The geography of remote work also reveals differences in its regularity. Manchester and Copenhagen show stable presence from day to day throughout the week, signalling a practice integrated into how employment functions. Amsterdam and Paris, by contrast, show a week in "waves," with more than eight percentage points difference between the midweek peak and the ends of the week: working remotely more on Wednesday than on a Monday or Friday reflects an individual trade-off logic rather than a formalised practice.

But the temptation to reduce mobility analysis to remote work alone would be a serious strategic error. In France, approximately 65% of jobs cannot be done remotely. Behind the high adoption figures in global metropolitan areas, a large share of the active population continues to go to work in person, often on non-standard schedules. Tradespeople, healthcare



Part-time work: gender gap by city - Keoscopie 2026 survey

workers, public service employees, teachers, retail and food service workers: these professions, overrepresented among working-class populations, are also those for which public transport is most indispensable — and most required at non-standard times of the day.

Issues and recommendations: permanent appeal as standard

For decision-makers and transport operators, the response to this fragmentation of work schedules must be twofold. First, it entails recognising local specificities: the mobility needs of a worker in Hyderabad who works seven days a week are not the same as those of a Parisian executive working remotely three days a week. But above all, it means maintaining an appealing service throughout the day, the week, and the year - what might be called the ”permanent appeal” of the service provision.

This notion of permanent service is not a luxury or an abstract ambition: it is the condition for public transport to fully play its role as a lever in reducing car dependency. A service that collapses outside peak hours, disappears on weekends or holidays, or becomes impractical for shift workers and people with non-standard hours, is a service that mechanically drives individual car use. And once that reflex is established, the car does not disappear again during peak hours.

- Recognise that the ”typical work week” is a fiction in the majority of surveyed areas
- Maintain quality service in the evenings, on weekends, and on holidays, in line with the reality of working practices
- Design timetables based on actual cumulative weekly demand, not from snapshot photographs
- Account for the overrepresentation of women in jobs with non-standard hours: mobility policies are also equality policies.

Imperative network consistency

The permanent appeal of service provision is not just a matter of timetabling: it is also a matter of consistency across all links in the network. It would be an illusion to think that a backbone line operating 24/7 is sufficient if connections to peripheral neighbourhoods stop at 10 pm. Likewise, maintaining high frequencies on weekdays is only meaningful if the weekend service offers a credible alternative to the car. The mobility experience is lived end to end: from one’s front door to the final destination. Permanent appeal must thus apply to the entire chain.

The survey data on atypical work schedules give a good impression of what is at stake: if 40% of workers worked on a weekend day, if more than 7 in 10 started or ended their day outside peak hours, and if these realities apply to tens of millions of people in global metropolitan areas, then the share of mobility demand that falls outside ‘traditional’ timetables is far greater than what planning models currently account for. Quantifying this invisible demand is a prerequisite for any ambitious permanent appeal policy.

Chapter 3

Travelling without fear: a global challenge

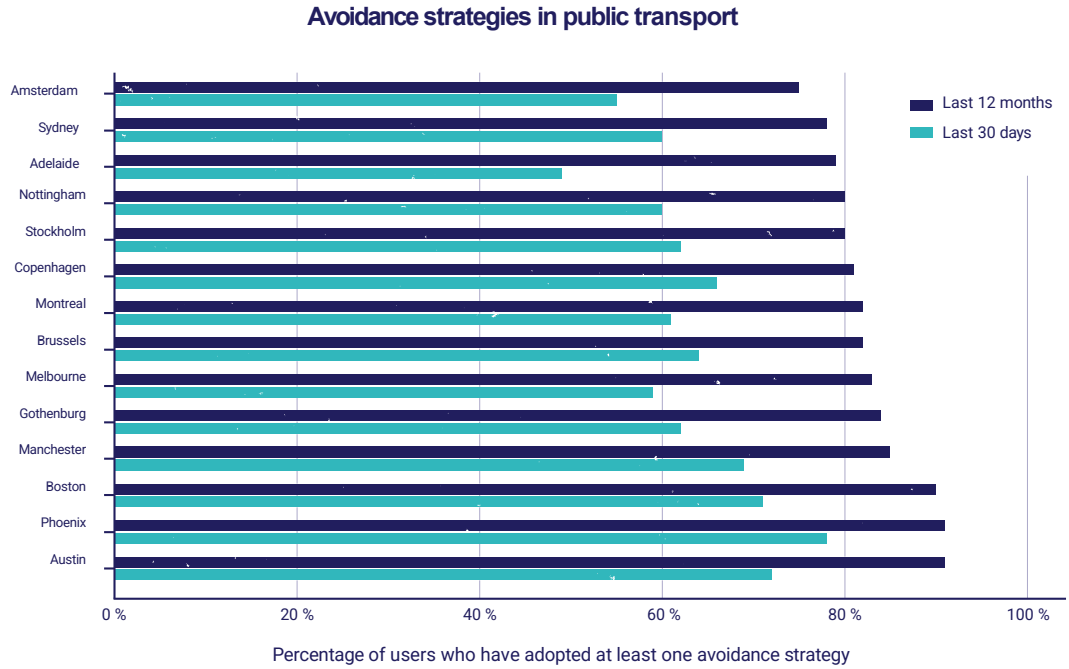
It is not actual insecurity that dictates behaviour, but its perception — and this distinction changes everything

One finding in the survey data encapsulates a profound and universal concern: six out of ten public transport users have, over the past thirty days, employed at least one strategy to cope with a sense of insecurity. Over a twelve-month period, this proportion rises to more than eight out of ten. The figure does not vary drastically by country, nor by transport system. It remains remarkably stable from Amsterdam to Hyderabad, from Copenhagen to Phoenix. What this finding reveals is that safety in public transport is not primarily a question of statistical objectivity: public transport remains, in practice, one of the safest modes of travel in the world. It is a question of perception, of lived experience, of emotional relationship with a shared public space. And this, documented, measurable and universal perception, shapes behaviour with as much power as reality itself. For operators, this represents a decisive paradigm shift: acting on security is not enough if one does not simultaneously act on the sense of security.

Universal avoidance techniques

Three behaviours dominate all around the world: letting a loved one know before taking a means of transport (from 47% in Paris to 88% in Hyderabad over the past 12 months), appearing busy (with earphones or a phone) to avoid unsolicited contact (from 50% in Amsterdam to 76% in Austin), and going so far as to avoid taking public transport altogether - the most significant strategy, as it represents a renunciation of mobility (from 37% in Paris to 61% in Boston).

This last strategy deserves particular attention. It constitutes a concrete loss of freedom, often compensated by resorting to a personal vehicle, which mechanically reinforces car dependency in comm-unities where there are already a lot on the roads. In Brussels, more than one in two users has altered their public transport route for safety reasons (58%) and has changed how they dress (51%). These signals indicate that security policies have not yet produced their effects on users' lived experiences. And that there is a reservoir of lost mobility - not for lack of service, but for lack of trust.



Avoidance strategies in transport: last 12 months vs last 30 days -Keoscopie 2026 survey

Gender: the first line of fracture

While the sense of insecurity is universal, its intensity and forms differ by gender with a troubling consistency across all the countries studied. International data confirm what scientific research has long established: women are structurally more exposed, more vigilant, and more constrained in their mobility than men. Studies show that women's fear in transport differs from men's: men tend to fear theft, while women fear gender-based violence and harassment. According to the European Union Agency for Fundamental Rights, up to 55% of women in the EU have already been sexually harassed on public transport.

A Keoscopie survey on gender and mobility in France provides striking granularity: 52% of women appeared occupied on transport over the past year, versus 33% of men. 50% told a loved one when they were setting off, versus 34% of men. 47% changed how they dressed, versus 31% of men. These gaps describe a double burden: women must devote considerable cognitive energy to their own protection on a trip that men make without a thought.

> "During my nursing studies, I often took public transport to get to the hospital very early in the morning. I didn't feel safe... So much so that I was a bit afraid of taking public transport for a while."
>
> — *Young woman in Lille, Keoscopie 2024*

Avoidance behaviours are learned from adolescence for women, sometimes as early as age 10, and persist throughout life. This is not anecdotal caution: it is a partial confinement that restricts the freedom of movement of half the population. Nighttime crystallizes these inequalities. In France, 45% of female transport users aged 15 to 29 prefer other modes or give up going out entirely after a certain hour, a rate two times higher than for men of the same age.

Austin vs. Amsterdam: Two worlds, the same fears

The international survey enables an unprecedented comparison between radically different mobility cultures. On one side, Amsterdam and Copenhagen, where 62% and 49% of residents respectively use bicycles several times a week, where public transport ranks among the major options, and where intermodal profiles are most developed. On the other, cities like Phoenix and Austin, where more than 80% of residents use their personal vehicle several times a week, and where only 15 to 19% use public transport with weekly frequency.

Yet, despite these diverging contexts, the sense of insecurity in public transport reaches comparable, even higher, levels in North American and Indian cities. In the United States, more than nine in ten users deployed an avoidance strategy during the year - the highest level in the entire study, tied with India. This apparent contradiction is partly explained by a selection effect: where public transport is little used, the users who take it are often those who have no alternative, and less-frequented networks are perceived as riskier.

In India, the mechanism is different but leads to the same result: transport is massively used, but under conditions of congestion and density that sustain anxiety. Both low user density and over-density lead, by opposite paths, to the same high feeling of insecurity. This counter-intuitive finding is valuable: the solution does not lie solely in increasing ridership, but in the quality of the on-board experience.

A short step from lack of amenities to a sense of insecurity

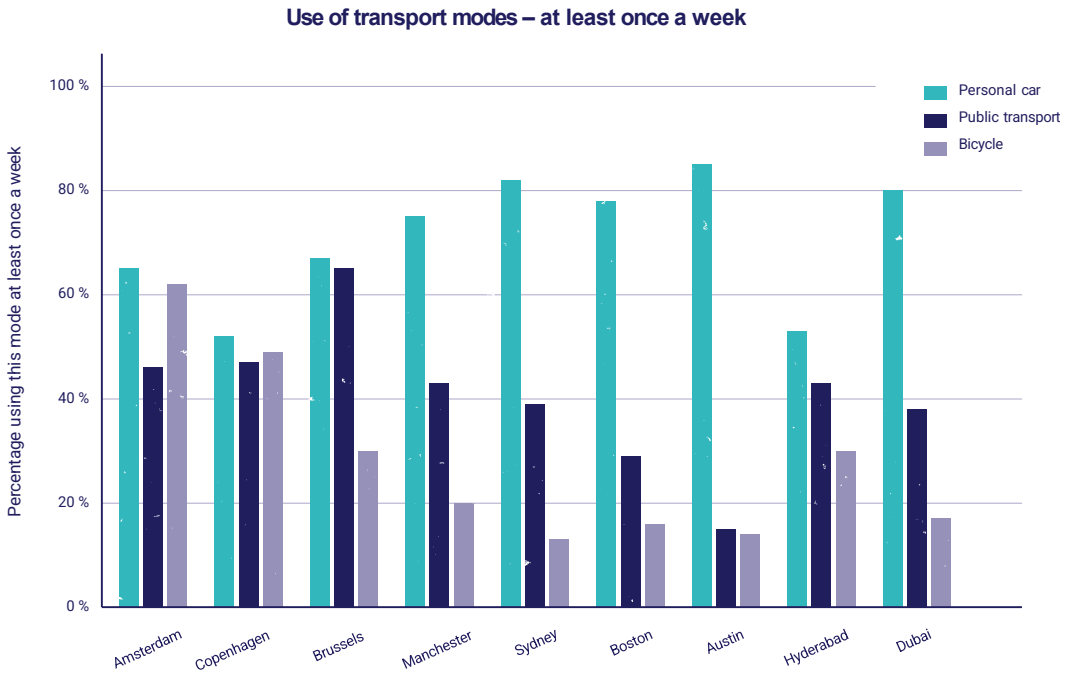
The sense of insecurity is not limited to assaults or harassment: it is also fed by an accumulation of small unpleasant experiences that degrade the journey experience. For one in two public transport users, having to stand causes significant discomfort. In a packed bus or metro train, the physical constraint - being crammed, jostled, forced to hold shared poles - creates situations of unchosen contact that can quickly become sources of discomfort, or even anxiety.

For women in particular, this forced proximity is experienced with heightened vigilance. Vehicle overcrowding is one of the situations most frequently associated with harassment and groping, precisely because the crowding of bodies provides cover for perpetrators and makes any reaction or escape difficult. In India, 71% of residents in Hyderabad and Pune report being bothered by the lack of toilets at major stops: a figure that directly points to issues of dignity and safety, particularly for women.

In Boston, Phoenix, and Austin, navigation difficulties (finding one's stop, managing connections) generate some of the highest reported discomfort, with rates reaching 46 to 49%. These irritants may seem trivial compared to violence, but they contribute to building a negative image of public transport that in turn feeds the general sense of unease. The causal chain is direct: poor signage > navigation stress > anxiety > avoidance strategy > recourse to the car.

85%
of women adopted an avoidance strategy (vs. 81% of men)

94%
of 18-24 years old adopted an avoidance strategy (the biggest users, the most anxious)



Use of transport modes (car, PT, bicycle) at least once a week – 9 selected metropolitan areas

Mode conflicts: a coexistence under pressure

Beyond insecurity experienced in public transport itself, the survey reveals a broader dimension: conflicts between users of different modes of transport in shared public space. Across all countries, more than 7 in 10 respondents observe at least one mobility conflict in their metropolitan area, with a peak of 91% in Brussels and the American cities surveyed. These tensions are not marginal: they are part of the daily experience of mobility and contribute to building a general sense of hostility in public space.

The most frequently cited conflict in almost every country pits cyclists against motorists (53% of Montrealers, 55% of Copenhageners, 51% of Brussels residents). The most surprising factor in the results is the over-representation of e-scooters in Europe: despite limited use, they concentrate a significant share of reported conflicts : 51% of Gothenburg residents cite them in tensions between scooters and pedestrians, 49% in Paris, 41% in Stockholm. In Indian cities and Dubai, tensions between delivery workers and other users are far more frequent than in Europe (40% in Hyderabad).

A roadmap for a shared sense of security

The lessons of this international survey, combined with the most effective initiatives observed around the world, outline a coherent roadmap for transport operators. Three levers emerge, each complementing the other two.

The first lever remains the quality of infrastructure and service: redesigned waiting areas, careful lighting along access routes, improved punctuality that mechanically reduces exposure time in empty stations. Training staff to assist people in vulnerable situations and increasing their visible presence during off-peak hours are actions that can be applied anywhere in the world.

Technology constitutes a second decisive lever, provided it is accessible and known to the general public. Simple reporting tools - via SMS, app, or alert button - have demonstrated their effectiveness. The challenge for operators is to deploy these tools at scale while also working on accurate risk perception: communicating transparently about actual crime data in transport networks is an act of trust as much as a branding strategy.

Finally, perhaps the most structural lever is conceiving of public space as a common good to be preserved collectively. Involving users in safety audits, engaging community groups and neighbourhood residents in service design, turning awareness campaigns into tools of cultural change rather than mere display: these are all approaches that make every passenger an active contributor to shared safety.

What the survey tells us about the best-performing cities

Comparative analysis across the surveyed cities yields several lessons about the configurations that produce the highest levels of safety perception. Not surprisingly, cities that combine dense transport provision, high frequencies at all hours, strong presence of well-trained staff, and quality infrastructure show the lowest avoidance rates. Amsterdam, Stockholm, and Copenhagen - cities where active and collective mobility is culturally dominant - stand out with below-average avoidance rates, even if these rates remain significant.

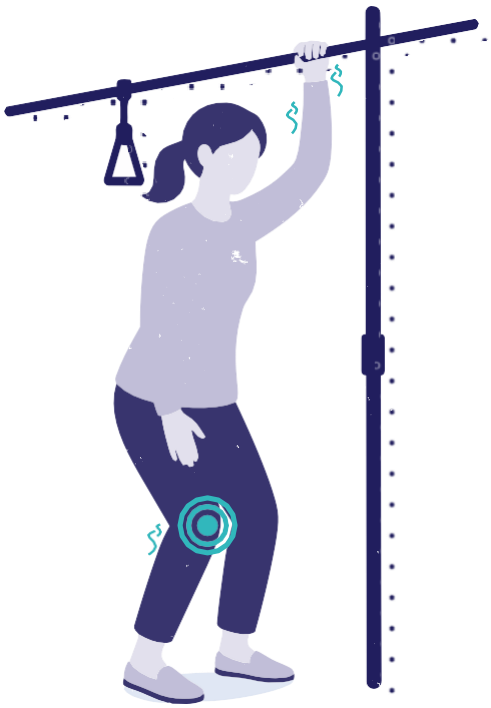
What is less predictable is the correlation between the quality of basic infrastructure (signage, lighting, stop cleanliness, availability of toilets) and the sense of security. Cities that invest in these apparently trivial fundamentals consistently record more positive results in safety perceptions. This confirms an insight well-documented in environmental criminology: a well-maintained, cared-for space sends a strong social signal. It says that this space is watched over, valued, shared. It reduces the perception of abandonment that fuels the sense of insecurity.

Operator transparency on actual crime data constitutes a third underused lever. In several of the metropolitan areas studied, the perceived risk significantly exceeds the statistical reality of incidents in transport. Communicating regularly and pedagogically about actual figures - while showing that user complaints are taken seriously - is an act of trust that helps recalibrate perceptions without denying real problems.

Chapter 4

Small adjustments, big impact

When public transport embraces the everyday vulnerabilities we all share



It is 7.50 am in Brussels. Leila grips the bus pole and mentally calculates the distance to the exit, ready to step off if her balance falters. At the same moment in Hyderabad, Asha anticipates the next stop and scans her surroundings: no public toilets in sight, better to cut the trip short. In Boston, John boards carefully, his fibromyalgia restricting his movements. Behind these everyday scenes lie multiple vulnerabilities (physical, psychological, or cognitive) that profoundly transform the way people travel. These vulnerabilities are not a marginal or future reality. In 2030, one in six people worldwide will be 60 or older. In 2050, there will be more people in situations of vulnerability than ever, present in every territory. But the stakes are not only demographic: the international Keoscopie survey reveals that these vulnerabilities are already, today, the ordinary condition of a large fraction of current passengers. Accessibility is not tomorrow's problem. It is today's investment. And this investment, far from being a burden, represents a lever of universal quality: a network designed for people with difficulties is structurally a better network for everyone.

The geography of physical vulnerabilities

According to the World Health Organization, 1.3 billion people (one in six) live with a significant disability. Added to this figure are all the invisible vulnerabilities that go beyond conventional representations, often anchored in wheelchair and white cane pictograms. A much broader reality thus emerges: arthritis that makes gripping a pole painful, diabetes that leads to anticipating each trip based on available toilets, chronic musculoskeletal pain that makes standing in a packed bus a physical ordeal. These vulnerabilities are not visible. They trigger no signal, activate no priority seating. They are managed in silence, at the cost of permanent vigilance that exhausts itself over the course of trips.

The international Keoscopie survey quantifies this reality from the perspective of lived experience. Among public transport users surveyed in the 20 metropolitan areas studied, 88% had to stand at least once during the past year. 76% report having no access to toilets at the major stops of their network. And 58% reported having feared falling or losing their balance, a remarkably stable rate across continents: 55% in Paris, 57% in Sydney, 60% in Boston, 67% in Hyderabad.

KEY DATA — UNIVERSAL DIFFICULTIES

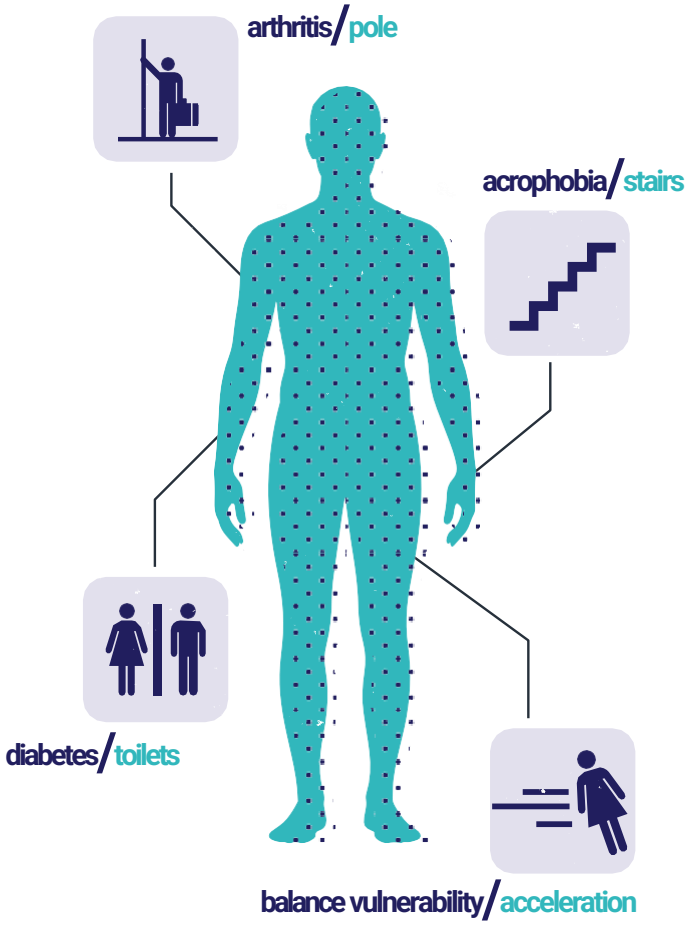
88% of users travelled standing at least once during the year

76% report having no access to toilets at major stops

58% feared falling or losing balance (similar across all continents)

71% in Hyderabad and Pune bothered by the absence of toilets at stops

What the consistency of these figures reveals is their systemic, not situational, nature. The same obstacles are found in contexts as different as India and Canada: uneven pavement, no curb ramps, narrow doors, stairs with no alternative, insufficient space for mobility aids. The recurrence of these obstacles on a global scale signals that resolving them is not a question of resources: it is a question of priorities.



What the eye cannot see: hidden vulnerabilities

While some physical vulnerabilities are receiving growing recognition in accessibility policies, psychological and cognitive vulnerabilities remain poorly integrated into network design approaches. Yet their prevalence is considerable. Globally, more than one billion people live with a mental disorder (WHO, 2025). Agoraphobia affects between 1.7% and 2% of the world's population each year. On the scale of a city of 5 million residents, this represents between 85,000 and 100,000 people for whom the transport network is, by definition, an environment to be navigated with trepidation.

A Dutch study published in 2023 followed 40 adults diagnosed with anxiety disorders and documented their mobility strategies. Almost all develop complex coping mechanisms: they avoid certain modes of transport, navigate around tunnels and bridges, stay in familiar environments, and seek a companion for uncertain trips. These strategies have serious consequences for their working lives: job choice, place of residence, access to economic opportunities. What the study shows, fundamentally, is that better network legibility and a reassuring human presence can substantially change the life perimeter of these individuals.

> "I have osteoarthritis in my knee - it doesn't stop me from walking, but it does limit me... When I have to climb stairs, it's very difficult."
>
> — *Elderly user, Keoscopie France 2024*

This reality invites us to rethink the design of transport spaces not only as mobility infrastructure, but as sensory and emotional environments. Station architecture, lighting quality, signage clarity, connection fluidity, visible staff presence: all these elements speak to the emotional brain before reaching the rational brain. They can reassure or cause anxiety, welcome or repel, include or exclude.

When intermodality rhymes with health

Between one's front door and the bus stop, those few minutes of walking that precede and extend the public transport trip become a "daily vitamin": they warm the joints, calm the mind, restore a sense of bodily control, and transform a constrained trip into a useful breathing space. Intermodality plays a discreet but decisive health role: by combining walking and public transport, it establishes regular and accessible physical activity, integrated into daily routines without equipment or performance demands, while also reducing the mental burden of the 'car-only' approach and the frictions of the last mile.

The social image of walking confirms this dynamic: in our survey, it is spontaneously described in very positive terms in all countries and predominantly associated with good health. It is perceived as the "health champion" among everyday modes of travel, and this positive perception does not vary significantly across continents or cultures.

Where service provision is dense and multimodal, the sense of security improves and trips can be adjusted to the body's condition of the day: choosing a more obvious connection, preferring an above-ground section, splitting the effort. These choices protect vulnerable passengers and expand their sphere of autonomy. This ecology of gentle movement rests on simple links: continuous pavements, generous crossing times, welcoming stops, obvious connections. Taken together, they convert multimodality into a tangible health benefit, both for busy workers and senior citizens wishing to 'keep moving'.

The digital divide: a cross-cutting and cross-generational challenge

Digital transformation has profoundly improved the mobility experience for most passengers: real-time planning, instant information, paperless ticketing. Amid a generally positive view - more than 80% of respondents believe that digital tools simplify their travel - the survey reveals a more nuanced reality: 32% of respondents report having already given up a mode of transport due to a lack of digital skills or knowledge. This rate rises to 38% in Copenhagen and Dubai, and 52% in Hyderabad.

The digital divide in mobility is no longer a question of hardware access - almost everyone owns a smartphone. It comes down to user skills, and these skills are not distributed in a linear fashion by age. The 18–24-year-olds in our survey are, counter-intuitively, more likely than those 65 and over to have refrained from a mode of transport due to insufficient digital proficiency. This reality highlights the importance of interface stability: every app redesign resets learning built up over time.

Digital support programmes developed by some operators (training workshops, simplified interfaces, staff trained in digital assistance) constitute concrete responses with tangible short-term results. Universal design of digital mobility tools is not an additional constraint: it is the condition for digital transport to be an opportunity for all passengers, not a mechanism of selection by competence.

What we can do together

Cross-referencing the global data reveals a reality that is both concerning and mobilising: vulnerabilities constitute the ordinary condition of a growing fraction of passengers, and this fraction will expand with global aging, the progression of chronic diseases, and the wider roll-out of digital tools. But these same data show that often modest improvements, a toilet at a stop, a stabilised digital interface, a trained travel assistant,, produce concrete effects on the mobility of the most vulnerable people.

Three directions emerge, applicable in all the contexts of the survey. The first is physical: the accessibility of spaces, smooth starts and stops, the availability of toilets at major stops are levers whose impact far exceeds those with vulnerabilities alone. A network that is more comfortable for those with difficulties is, structurally, a more comfortable network for everyone.

> "32% of users across all countries have at least once refrained from a mode of transport due to insufficient digital skills. This divide respects neither borders nor generations."

The second direction is human: the presence of trained staff capable of discreetly recognizing hidden vulnerabilities and providing appropriate assistance remains a reassurance factor that surveillance technologies cannot replicate. Training staff on these less obvious realities is an investment whose return is measured in loyalty and ridership.

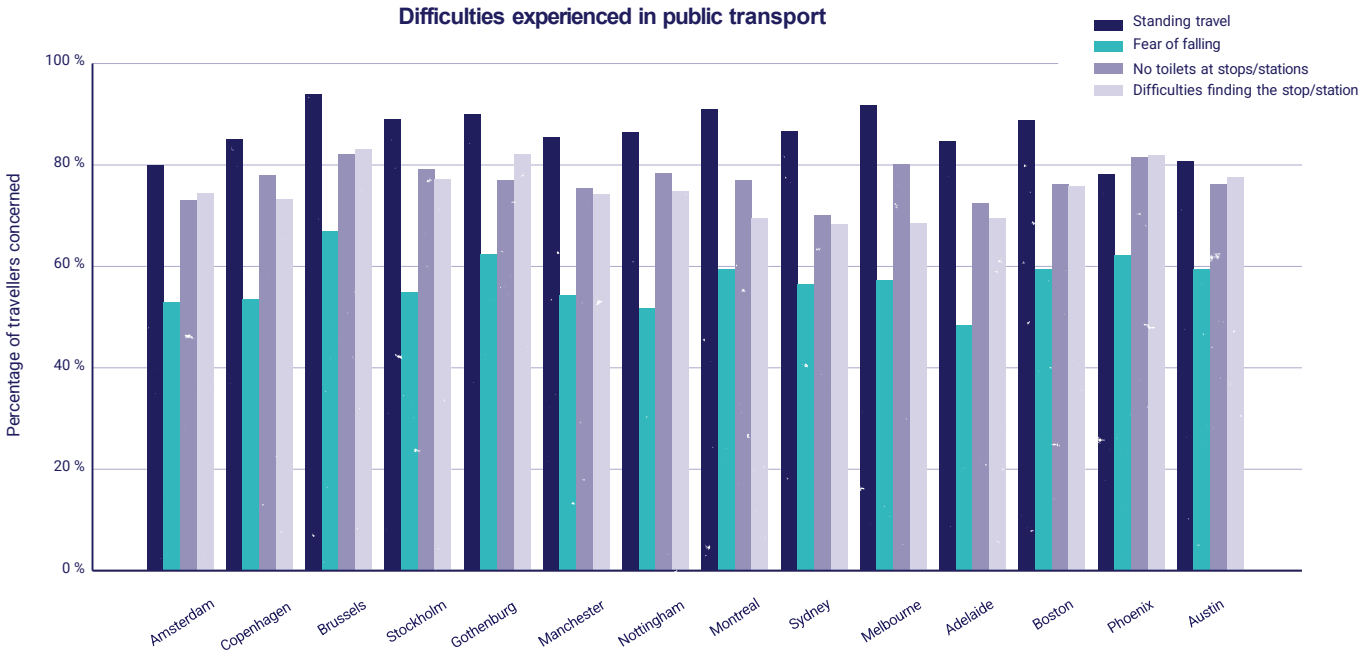
The third direction is digital: maintaining non-exclusively digital access channels for information, ticketing, and navigation; stabilising interfaces to preserve the learning of less agile users; actively supporting populations in building digital skills. Universal design of digital mobility tools is not an additional constraint. It is the condition for digital transport to be an opportunity for everyone.

Global aging: an opportunity for transformation

In 2030, one in six people worldwide will be 60 or older. In 2050, the number of people aged 80 and over will have tripled. This demographic reality is often presented as a challenge or a burden. The Keoscopie survey invites us to interpret it differently: as an opportunity for the profound transformation of transport networks, whose benefits would far exceed the elderly population alone.

Senior citizens who continue to travel in the decades ahead will not accept networks that do not account for their constraints. But the adaptations they call for (less noise, less crowding, more accessible seating, equipped stops, legible signage, the presence of staff) are precisely the adaptations that improve the experience of all users. This is the power of the universal design principle: when you design for the most constrained, you improve for everyone.

Several operators around the world have already understood this logic and developed specific programmes to support older people in their adoption of public transport. These programmes produce a double return on investment: they build loyalty among a population that could easily retreat to the car or give up on going out, and they enrich service design with a use intelligence that benefits all users.



Difficulties experienced in public transport – 14 selected metropolitan areas

| Takeaways |

The future: a collective challenge, a shared opportunity

Across the four dimensions of this international survey, one common thread emerges with growing force: all over the world, users do not expect public transport to be perfect. They expect it to listen. To acknowledge and register everyday inconveniences. To keep vulnerable people safe, guide the lost, and support those who are not comfortable with digital tools. It is by this measure that trust is built between networks and their users. And it is here that the most powerful opportunities lie for creating mobility that is more inclusive, smoother, more ecological, and truly universal.

Three universal levers

From this international survey emerge three levers for action applicable in all the contexts studied, regardless of the maturity of the transport network or the cultural specificity of the community.

> **The first lever** is that of the concrete quality of the customer experience. Tackling the most universal irritants (overcrowding, absence of toilets, clarity of passenger information) will produce immediate effects on network appeal for all users, not just the most vulnerable. A network designed for those with difficulties is structurally a better network for everyone: this principle, demonstrated by decades of universal design in other sectors, still awaits full application to public transport.

> **The second lever** is that of human presence and the visibility of security. Training staff to recognise hidden vulnerabilities, increasing their presence during off-peak hours and at sensitive times, deploying simple reporting tools known to the general public: these are all actions whose impact on the sense of security is documented and measurable. Technology supports this approach, provided it is accessible and known - not as a substitute for human presence, but as its extension.

e **The third lever** is that of the permanent appeal of service provision. The fragmentation of working schedules makes it imperative: a service designed only for Monday-to-Friday peak hours leaves a growing fraction of actual users (potentially all of them) in a blind spot. Maintaining an attractive service throughout the day, the weekend, and the year is not a luxury: it is the condition for public transport to fully play its role in reducing car dependency.

Diversity as a strength, consensus as a compass

It would betray the survey to draw uniform conclusions from it. The consensus of expectations does not mean uniformity of responses. In Phoenix, where 80% of residents drive their car several times a week, the public transport development strategy cannot be the same as that in Copenhagen, where a lot of people cycle. In Hyderabad, where network overcrowding generates both the highest use rates and insecurity rates in the survey, investment priorities are not the same as in Amsterdam, where the issue is more about supporting vulnerable users than building new infrastructure.

But beneath this diversity of solutions, the consensus of problems constitutes a valuable compass. It says that affordability is not a purely French problem but a global challenge. It says that the sense of insecurity in transport is not a specificity of cities with a poor reputation, but an experience shared by the vast majority of users. It says that everyday vulnerabilities are not marginal but structural. And it says that these challenges, because they are universal, call for universally conceived solutions - even if applied locally.

The time for action

The message of this survey is, at its core, a message of hope. It does not describe users who have turned their backs on public transport. It describes users who still believe in it, who see it as a lever of freedom and equity, and who ask their operators to rise to the level of that trust. The expectations are clear, measured, realistic. They do not call for revolutions but for commitments kept. They do not ask for perfection but for consistency.

The 2026 Keoscopie international survey thus delivers something rare in the mobility debate: not a catalogue of grievances, but an action programme grounded in the voices of users around the world. This programme is coherent, realistic, and, for those with the courage to hear it, carries an extraordinary promise: that of truly universal mobility, accessible to all people, at all hours, in all conditions. It is by this measure, and no other, that public transport networks will be judged in the decades to come.

Keoscopie: twenty years of listening for the benefit of mobility

This international survey is the outcome of twenty years of development of the Keoscopie programme, a Keolis research initiative dedicated to understanding citizens' lifestyles and their impact on mobility. Since its first studies on French citizens, Keoscopie has progressively expanded its geographic and thematic scope to become one of the reference observatories in urban mobility on and international level.

The "Beyond Appearances" collection, of which this publication constitutes the first international issue, embodies the programme's philosophy: going beyond the obvious, questioning received wisdom, shining a light on the realities behind the figures. The unsuspected consensus revealed by this edition is a perfect illustration: who would have predicted, before consulting the data, that the mobility expectations of a resident of Pune and a resident of Stockholm would converge to such a degree? Who would have bet that 18–24-year-olds would, everywhere in the world, be simultaneously the biggest users and the most anxious about public transport?

These surprises are the hallmark of Keoscopie. They remind us, survey after survey, that the lived reality of our fellow citizens is more complex, more nuanced, and richer than the models that claim to summarise it. They invite renewed listening, humility before data, and an undiminished ambition: to build, everywhere in the world, public transport that is truly worthy of the mobile humanity that uses it.

AT A GLANCE: MAIN TAKEAWAYS

- Expectations converge globally: more accessible, more extensive and safer public transport
- The working week is fragmented: service must cover all schedules
- 8 out of 10 users deploy avoidance strategies: perceived security is the central issue
- Everyday vulnerabilities are universal: each improvement benefits everyone
- **A network designed for the most vulnerable is, structurally, a better network for everyone**

KEOLIS