

AUSTRALIA

KEOSCOPIE

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The survey in the Australia zone covers inhabitants in the cities of Sydney, Melbourne, Brisbane, Perth and Newcastle. 65% reside within the city and 35% on the outskirts of the city. In the results presented below these cities are compared to the benchmark cities of London and Los Angeles, as well as to the averages of all 37 cities surveyed worldwide.

ABOUT KEOSCOPIE INTERNATIONAL

Keoscopie International is a global study based on nearly 6,600 interviews conducted in **37 cities** across **15 countries**. The 20-minute online surveys (except in India, where interviews were conducted face-to-face) were carried out by Ipsos on behalf of Keolis in July and August 2018.

88%

88% of Australian respondents own a smartphone, in line with the worldwide average (89%). 83% own a computer and 57% own a tablet.

33%

Only **33% of Australian respondents are weekly users of public transport**, lower than the worldwide average (51%).

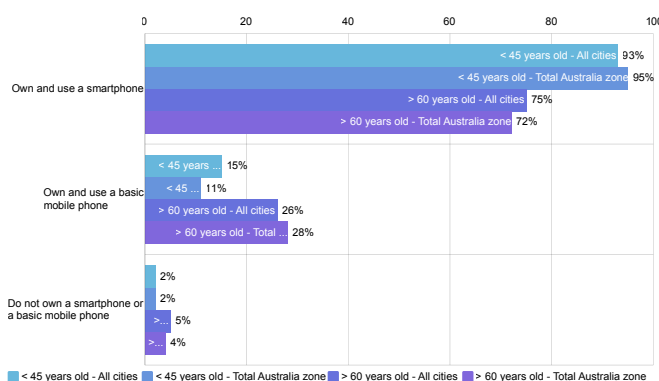
74%

Intermodality is extensive, with **74% of Australian respondents declaring they employ other means of transport before public transport** (always or occasionally).

TECHNOLOGY: WHAT ARE THE USES AND ATTITUDES IN AUSTRALIA?

Australian smartphone users use an average of 5 types of apps at least once a month. These apps are mainly used for social media (65%), banking (63%) and maps (62%). 68% of respondents in Australia use a map or transportation app at least once a month. 3 specific transportation apps are used most often, mainly to consult maps (53%), to search for the best itinerary (39%) and to view the next departure (36%).

SMARTPHONE AND MOBILE PHONE USAGE BY AGE

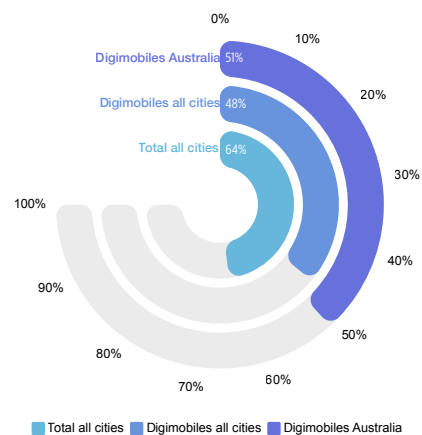


AGE AND INCOME GAPS DEEPEN THE DIGITAL DIVIDE

In Australia, age and income have a strong influence on technology use. Computer ownership for those over-60 is much higher than for the 25-34 population (95% vs 71%). While 96% of high-income respondents own and use a smartphone, the same is true for only 79% of low-income respondents.

SHARE OF RESPONDENTS WHO AGREE WITH THE PHRASE:

"AT THE SPEED AT WHICH TECHNOLOGY IS DEVELOPING, I FEEL LIKE I COULD SOON BE OUTPACED."



ENJOY THE UTILITY OF TECH, BUT WORRY ABOUT HOW THEIR DATA IS USED

While a vast majority of Australian respondents declare that technology makes life simpler (85%) and helps them access more knowledge on a daily basis (92%), 83% worry about the way companies use their personal data. 51% of Australian Digimobiles* feel like they could soon be outpaced by technological development.

*Digimobiles: people who own a smartphone, are hyper-connected and fully at ease with this technology, which they use in all or nearly all aspects of daily life.

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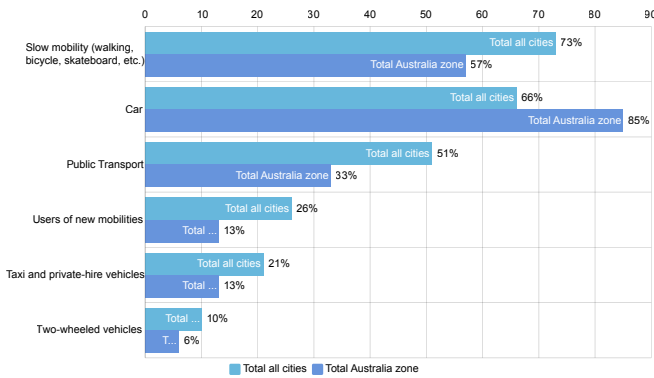
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MOBILITY HABITS IN AUSTRALIA

48% of Australian respondents say they constantly or often change their work/study days, slightly lower than the worldwide average (54%).

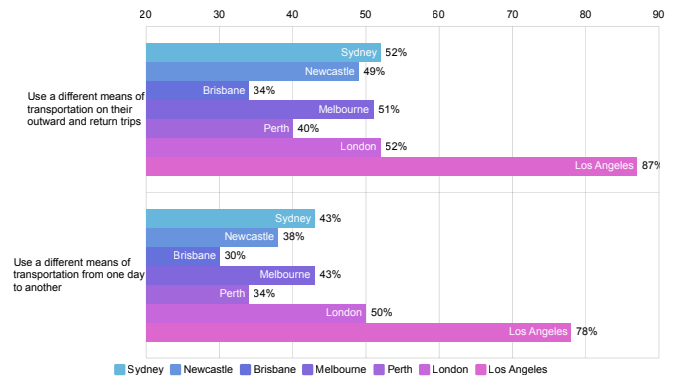
WHICH MEANS OF TRANSPORTATION DO YOU USE AT LEAST ONCE A WEEK?



CARS REMAIN THE PREFERRED MEANS OF TRANSPORT

The car is king in Australia where 76% of respondents use their vehicle at least once a week to get around, 21 points higher than the worldwide average. Next comes walking for trips of more than 15 minutes.

SHARE OF RESPONDENTS WHO USE DIFFERENT MEANS OF TRANSPORTATION FOR THE SAME TRIP - BY CITY



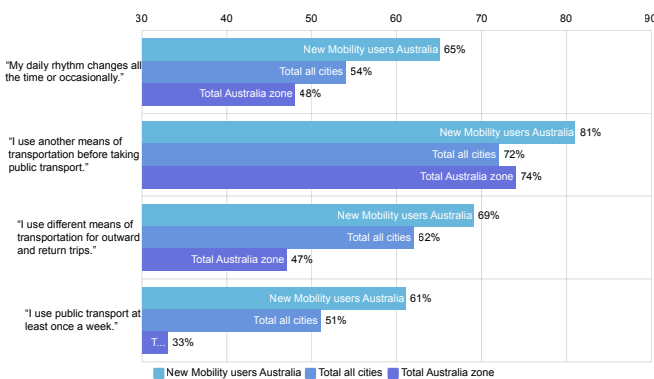
INTERMODALITY AND MULTIMODALITY BELOW GLOBAL AVERAGES

47% of Australian respondents use a different means of transport on their outward and return trips (34% in Brisbane vs 52% in Sydney), lower than the worldwide average (62%). 39% of Australians (vs 57% worldwide) use a different means of transport from one day to another.

TECHNOLOGY'S IMPACT ON MOBILITY IN AUSTRALIA

77% of Australian respondents think that technology plays an essential role in simplifying their trips. Public transport users and new mobility* users are particularly enthusiastic about technology helping them to select the right means of transport for the right time, to access several means of transport, and to optimize their trip and the time spent.

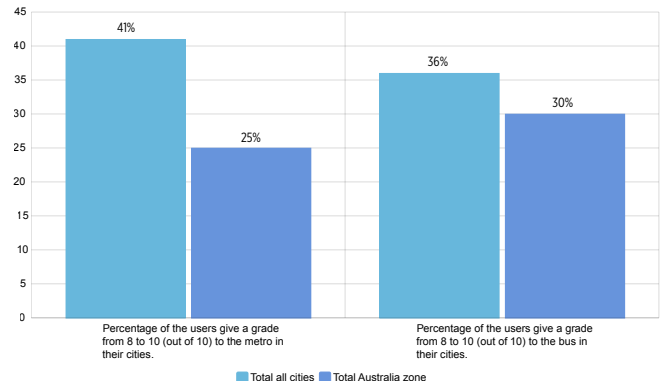
CHARACTERISTICS OF NEW MOBILITIES' USERS



WHO ARE THE NEW MOBILITY USERS?

Australian respondents who use new mobilities at least once a week are more Digimobile than the general population (40% vs. 26%), and their routines are more fragmented (65% vs 48%). 61% use at least one new mobility at least once a week (10 points higher than the worldwide average).

USER SATISFACTION LEVEL OF PUBLIC TRANSPORT



WHAT ARE THE EXPECTATIONS OF AUSTRALIANS CONCERNING PUBLIC TRANSPORTATION?

38% of Australian respondents want better infrastructure for pedestrians, a figure that remains below the worldwide average (43%). 47% would like to improve the frequency of public transport, including on weekends and evenings, while 35% expect greater comfort.

*New mobilities: include private driver services, electric bicycle, car sharing, carpooling, folding scooter, Segway, electric unicycle, hoverboard, etc.