BELGIUM-GERMANY-THE NETHERLANDS

AMSTERDAM • BRUSSELS • DÜSSELDORF • KÖLN • ROTTERDAM

BENCHMARK CITIES: STOCKHOLM • COPENHAGEN

The survey in the Belgium-Germany-the Netherlands zone covers inhabitants in the cities of **Amsterdam, Brussels, Düsseldorf, Koln, Rotterdam and their surrounding areas.** 41% of survey respondents reside within the city, and 59% on the outskirts of the city. In the results presented below these cities are compared to the benchmark cities of Stockholm and Copenhagen, as well as to the average 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%

There is a widespread digital technology adoption in the Belgium-Germany-the Netherlands zone. **88% of survey respondents own a smartphone**, 79% own a computer and 53% own a tablet.

41%

Only **41% of respondents in the Belgium-Germany-the Netherlands zone are users of public transport at least once a week**, compared to 51% of respondents globally.

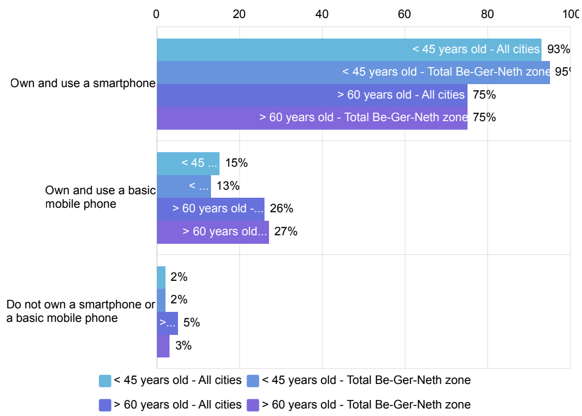
63%

Below average intermodality, with only **63% of Belgium-Germany-the Netherlands zone respondents (vs 72% worldwide) declaring they employ other means of transport before public transport** (always or occasionally).

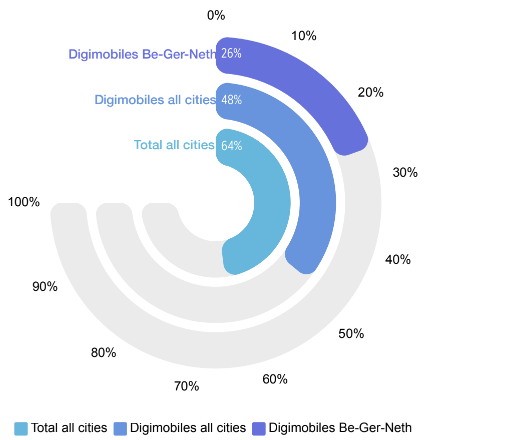
TECHNOLOGY: WHAT ARE THE USES AND ATTITUDES IN THE ZONE?

53% of this population use maps and/or transportation apps at least once a month. And 3 travel apps are used at least once a month, mainly to consult maps (51% of users), to search for the best itinerary (51%), to view the next departure time (46%), and for timetable search (44%). This is markedly below the averages for Stockholm and Copenhagen (where 75% of respondents use maps and/or transportation apps at least once a month).

SMARTPHONE AND MOBILE PHONE USAGE BY AGE



SHARE OF RESPONDENTS WHO AGREE WITH THE PHRASE:
"AT THE SPEED AT WHICH TECHNOLOGY IS DEVELOPING, I FEEL LIKE I COULD SOON BE OUTPACED."



THE DIGITAL DIVIDE REMAINS, DESPITE LARGER SPREAD OF DIGITAL DEVICE OWNERSHIP

While 95% of the surveyed population under 45 years old owns a smartphone (vs 93% in total cities surveyed), this figure drops to 75% for those over 60 years old (the same the worldwide survey average for this age group).

BELGIUM-GERMANY-THE NETHERLANDS RESPONDENTS SHARE SOME CONCERNS ABOUT THE CONSEQUENCES OF DIGITAL TECHNOLOGY

26% of respondents who identify as Digimobile* worry about being outpaced by technology, compared to 48% among Digimobiles worldwide.

*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.

BELGIUM-GERMANY-THE NETHERLANDS

AMSTERDAM • BRUSSELS • DÜSSELDORF • KÖLN • ROTTERDAM

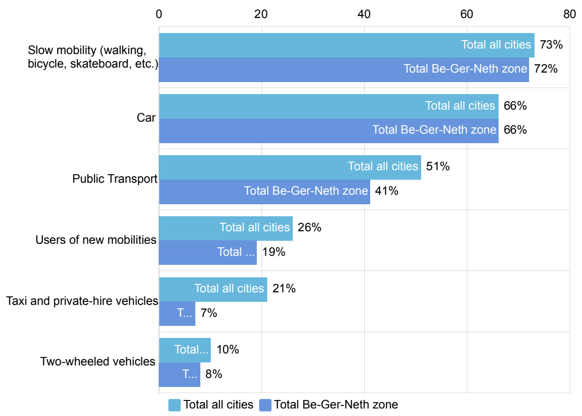
BENCHMARK CITIES: STOCKHOLM • COPENHAGEN

KEOSCOPIE

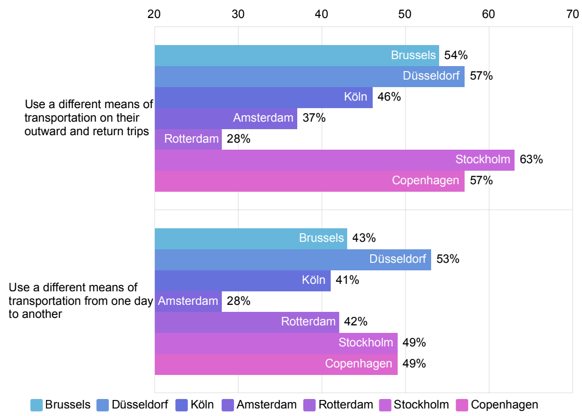
MOBILITY HABITS IN CITIES OF THE ZONE

53% of respondents from Belgium-Germany-the Netherlands state that their work/study days change all the time or occasionally. This figure varies significantly city to city, as it ranges from 41% in Amsterdam to 67% in Brussels (compared to 50% in Copenhagen and 72% in Stockholm).

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



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



A STRONG BICYCLE CULTURE AND PREFERENCE FOR PERSONAL VEHICLES

While car usage (as the driver) is within the survey average (57% vs 55% worldwide), walking is 11 percentage points below (although the reported figure varies strongly, from 49% in Köln to 75% in Brussels).The third-most common means of transport is the personal bicycle, which is used at least once a week by 42% of respondents (vs 19% worldwide).

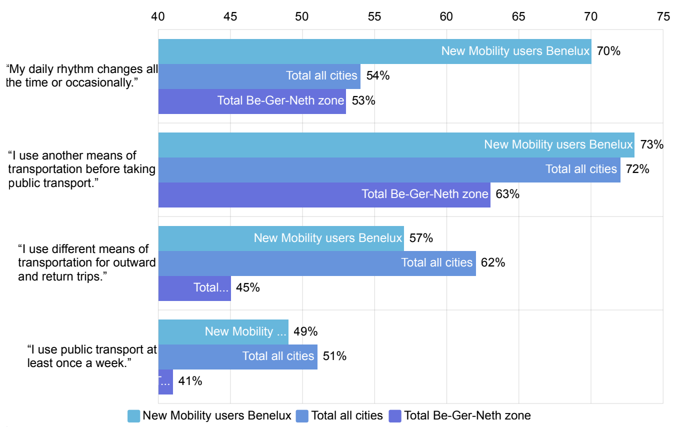
INTERMODALITY BELOW SURVEY AVERAGES

63% of Belgium-Germany-the Netherlands zone respondents always or occasionally employ other means of transportation before public transport (vs 72% worldwide).

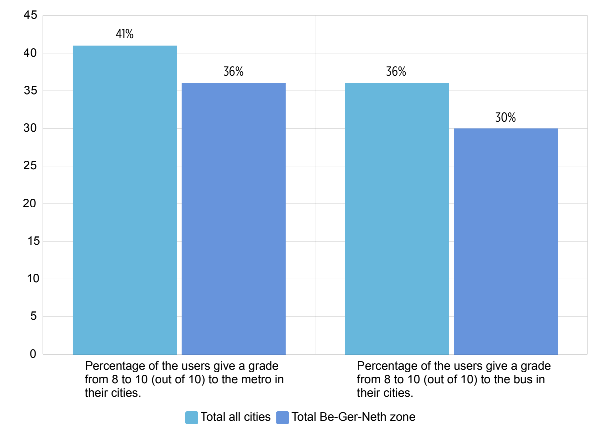
HOW TECHNOLOGY IS INFLUENCING MOBILITY IN THE CITIES OF THE ZONE

80% of respondents in this zone think that technology plays an essential role in simplifying their trips. This figure rises to 89% among Digimobiles, 83% among new mobility* users and 83% among public transportation users. The latter two groups particularly enjoy that technology makes their journeys simpler and more fluid by helping them to select the right means of transportation for the right time, to access different means of transportation, and to optimize their journey and its duration.

CHARACTERISTICS OF NEW MOBILITIES' USERS



USER SATISFACTION LEVEL OF PUBLIC TRANSPORT



WHO ARE THE NEW MOBILITY USERS?

Survey respondents in this zone who use at least one new mobility once a week are slightly more likely to be Digimobile (31% vs 25%). New mobility users have more fragmented daily routines, as 70% report that their days of work/study change all the time or occasionally, compared to 53% of zone respondents on average.

WHAT ARE THE EXPECTATIONS OF BELGIUM-GERMANY-THE NETHERLANDS FOR PUBLIC TRANSPORT?

Respondents in this zone rate their public transport lower than the survey average, but they are less likely to say that improving public transport frequency and comfort is "very important" to them.

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

Graphs programmatically created with Amcharts libraries