CANADA

MONTREAL • TORONTO

BENCHMARK CITIES: LYON • MANCHESTER

The survey in the Canada zone covers inhabitants in the cities of **Montreal and Toronto and their surrounding areas.** 82% of survey respondents reside in city centers, and 18% in their greater city area. In the results presented below these cities are compared to the benchmark cities of Manchester and Lyon, 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.

85%

85% of survey respondents in Canada own a smartphone, with a notable discrepancy between Montreal (79%) and Toronto (90%).

57%

57% of Canadian respondents use public transport at least weekly, slightly higher than the 51% average in all cities surveyed.

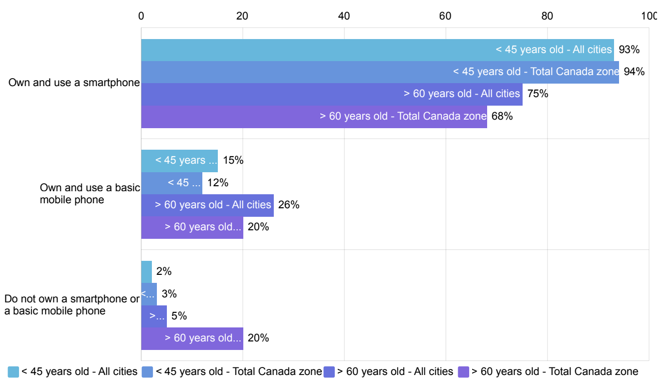
66%

Intermodality is slightly below average: **66% of respondents in the Canada zone report using another means of transport before public transport** (always or occasionally), compared to 72% in all cities surveyed.

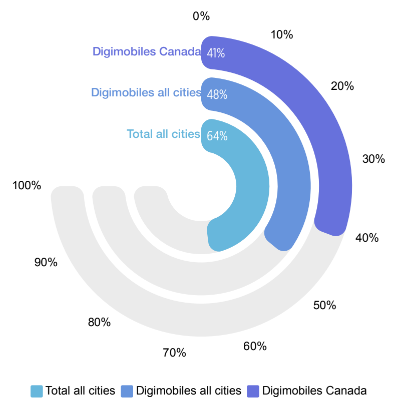
TECHNOLOGY: WHAT ARE THE USES AND ATTITUDES IN THE CANADA ZONE?

At 84%, computer ownership is more widespread than the average of all cities surveyed (77%); the same is true of tablet ownership, at 64% (vs. 52%). On average, this population uses 6 types of mobile apps at least once a month (compared to 5 in Manchester and Lyon), mainly mainly social media (66% of users), banking (58%), maps (57%), music (53%), shopping (48%) and games (47%).

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."



A DIGITAL DIVIDE SEEN IN THE OLDER AND LOWER-INCOME POPULATIONS

Among the Canadian population surveyed, the over-60 and lower-income groups are much more likely than their worldwide counterparts to own neither a basic mobile phone nor a smartphone. While mobile device ownership rates are correlated with youth and income, however, that is much less the case for other digital devices.

SIGNIFICANT CONCERNS ABOUT TECHNOLOGY'S IMPACT ON PRIVACY

41% of Canadian Digimobiles* feel they could soon be outpaced by technology (vs 48% for Digimobiles worldwide). Notably, Canadian Digimobiles are more worried about the way companies use their personal data (78%) than the average of Digimobiles worldwide (71%).

*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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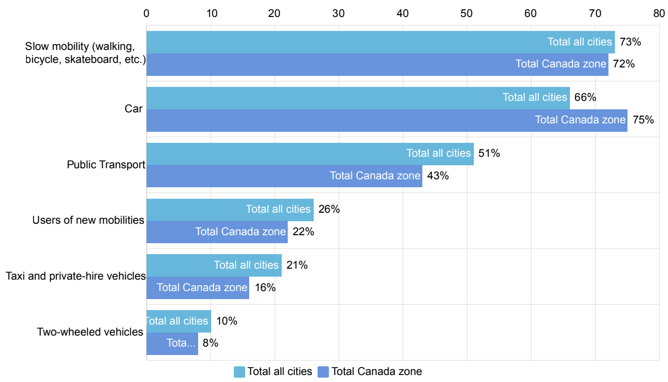
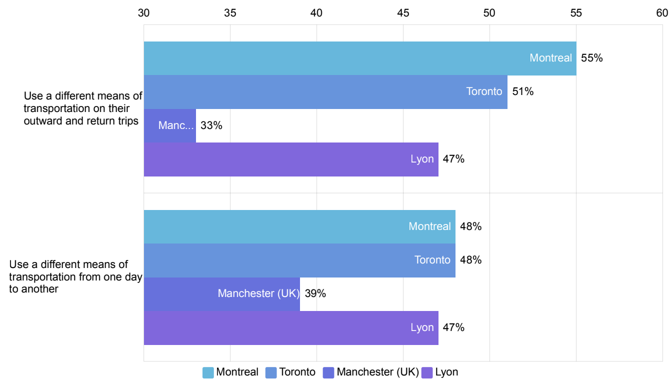
MOBILITY HABITS IN CANADIAN CITIES

53% of respondents say their work/study days change all the time or occasionally, close to global averages (54%). 33% of Canadian respondents report working from home at least once a week, which is more than the average of all cities surveyed (26%) and significantly higher than in Lyon (16%).

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



WALKING AND DRIVING ARE MOST POPULAR, AHEAD OF PUBLIC TRANSPORT

70% of Canadian respondents report walking at least once a week (for trips of more than 15 minutes), and 66% say they drive their own car at the same frequency (+11 points compared to survey average). 34% and 33%, respectively, use the metro and bus at least weekly. Carpooling is at 12%, much higher than the rates in Manchester (4%) and Lyon (2%).

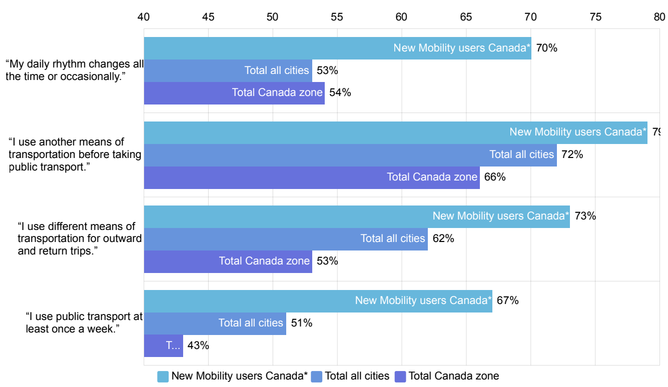
INTERMODALITY BELOW SURVEY AVERAGES

66% of Canadian respondents always or occasionally use another means of transport before public transport, compared to a 72% average in all cities surveyed.

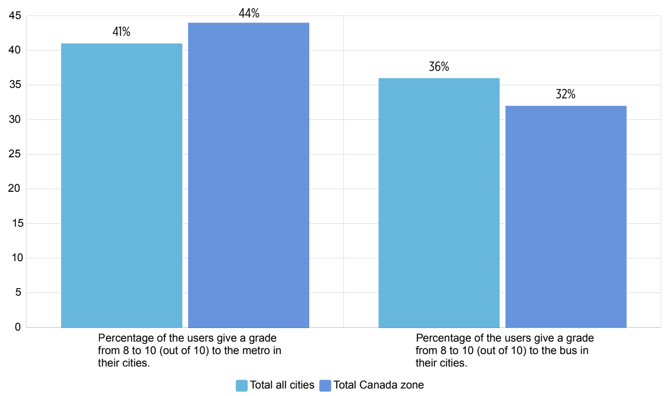
HOW TECHNOLOGY INFLUENCES MOBILITY IN THE CANADIAN CITIES SURVEYED

81% of Canadian respondents think technology plays an essential role in simplifying their trips, a figure rising to 94% for Digimobiles, 88% for new mobility* users, and 86% for public transport 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 transport for the right time, to access different means of transport, 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?

Canadian respondents who use new mobilities at least once a week are more Digimobile than the rest of the population (40% vs. 29%). Their routines are more fragmented, and they work Sundays and nights more often. Much more intermodal and multi-modal than other Canadian respondents, they are also more likely to use public transport at least weekly.

LEVELS OF SATISFACTION AND EXPECTATIONS FOR PUBLIC TRANSPORT VARY

Satisfaction with public transport varies by city and means of transport. For instance, 48% of Montreal respondents give their metro a grade of 8 to 10 out of 10, compared to 38% in Toronto. However, Canadian respondents are less likely than others to rate improvements to public transport frequency and comfort as "very important".

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

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