

# CHINA

BEIJING • WUHAN • SHANGHAI  
BENCHMARK CITIES: ALL

The survey in the China zone covers inhabitants in the cities of Beijing, Wuhan, Shanghai and their surrounding areas. 95% of respondents reside in city centers and 5% in their greater city area. These cities are compared to the average of all 37 cities surveyed worldwide.

## ABOUT KEOSCOPE INTERNATIONAL

Keoscope 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.

**98%**

China has near-total digital penetration with **98% of the survey respondents owning a smartphone**. That is significantly higher than the average rate of ownership of 89% in the 37 cities surveyed.

**72%**

**72% of respondents in China** (77% in Shanghai) **use public transport at least once a week**, well above the 51% average in all cities surveyed.

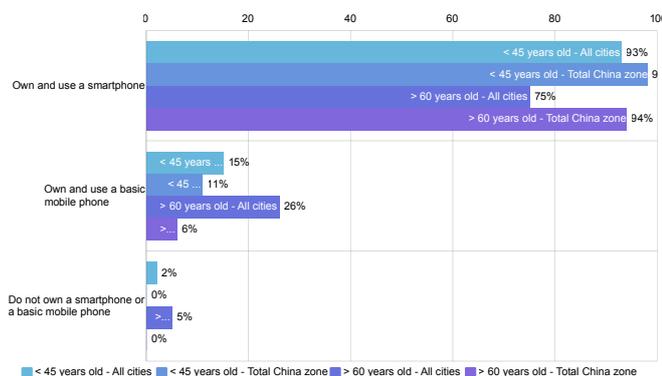
**82%**

Intermodality is among the highest in the China zone. **82% of China zone respondents always, almost always or occasionally employ other means of transport before public transport** (vs 72% worldwide), with little variation city to city.

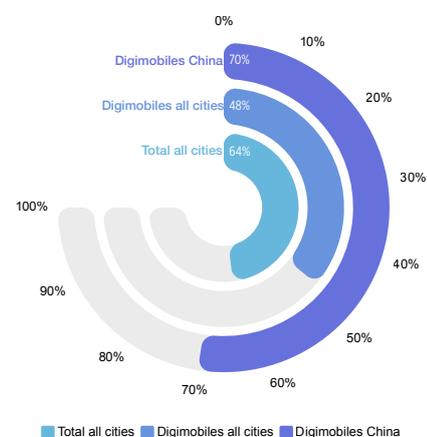
## TECHNOLOGY: WHAT ARE THE USES AND ATTITUDES IN THE CHINA ZONE?

Computer (90% vs 77%) and tablet (65% vs 52%) ownership is also more widespread in China. On average, smartphone users in China use 7 types of mobile apps at least once a month (compared to the global survey average of 6)—shopping (87% of users), social media (75%), maps (74%), banking (70%), transportation (65%), music (63%), and games (51%).

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."



### DIGITAL DIVIDE ALMOST NON-EXISTANT THANKS TO NEAR-UNIVERSAL ACCESS

The difference between the younger and older population when it comes to smartphone ownership is only 4 percentage points (98% of the population under 45 vs. 94% of the population over 60). Globally, that difference is 18% (93% vs. 75%). A mere 1% of low-income earners do not own a smartphone or a mobile phone, compared to 3% in the UK.

### CHINESE RESPONDENTS MORE WARY OF DIGITAL TECHNOLOGY

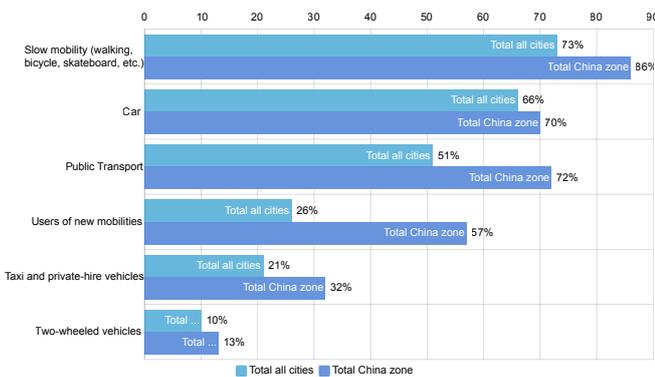
Nearly 4 out of 5 (79% vs 73% globally) respondents fear technological advances will create a society where people's opinions are controlled. 74% (vs. 64% globally) feel the speed of technological development will outpace them, including 70% of the Digimobiles\* (compared to just 48% globally).

\*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.

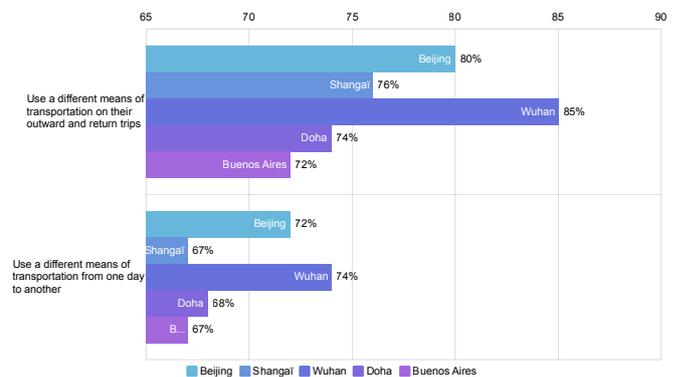
## MOBILITY HABITS IN CHINESE CITIES

While 59% of the Chinese survey respondents say their work/study days change all the time or occasionally (compared to 54% globally), only 9% state that their work/study days change all the time (compared to 19% globally). Chinese respondents are more likely to work on Sundays most of the time or occasionally (51% vs 42% globally) and at night (40% vs 36%) but are less likely to work from home at least once a week (17% vs 26% globally).

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



### RESPONDENTS USE DIFFERENT MODES OF TRANSPORT FOR TRAVEL

Compared to their counterparts around the world, Chinese respondents use a wide variety of modes of transport each week. Walking, for more than 15 minutes, (80% vs 68% globally) and personal car (63% vs 55% globally) are the most popular while twice as many Chinese respondents use the metro, compared to other zones (58% vs 29% globally).

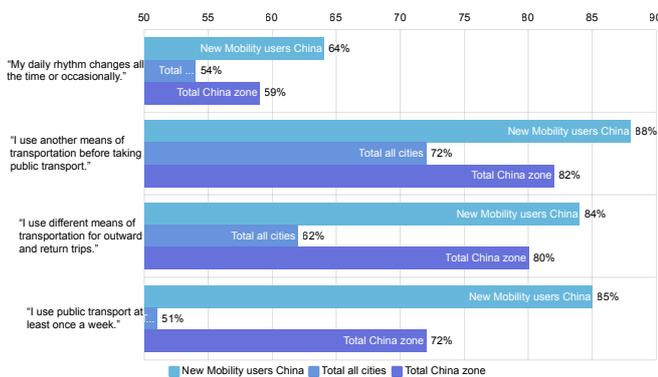
### INTERMODALITY AND MULTIMODALITY HIGHER IN CHINA THAN IN OTHER ZONES

Intermodality and multimodality are far more common in the China zone than elsewhere. For their daily trips, 82% of China zone respondents always, almost always or occasionally employ other means of transport before public transport (vs 72% globally). 80% use a different means of transport on their outward and return trips (vs 62% globally).

## AN OVERWHELMING NUMBER OF CHINESE RESPONDENTS BELIEVE THAT TECHNOLOGY HAS IMPROVED MOBILITY

96% of China zone respondents think that technology plays an essential role in simplifying their trips (vs 83% globally), a figure that remains the same among new mobility\* users, and rises to 97% among users of public transport, and 99% among Digimobiles.

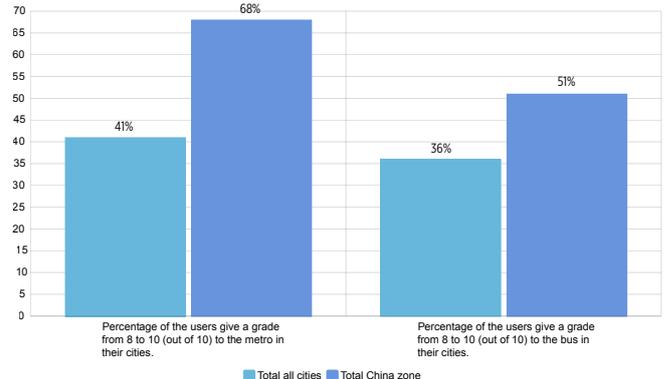
CHARACTERISTICS OF NEW MOBILITIES' USERS



### WHO ARE THE NEW MOBILITY USERS?

Interest in new mobilities among current users is significantly higher in China (77% vs 38% globally). Among potential users, the figure rises to 90% (vs just 65% globally). New mobility users in China are slightly more likely to be Digimobiles than the general population (58% vs 57%) and are also more likely to be users of public transport (85% vs 72% globally).

USER SATISFACTION LEVEL OF PUBLIC TRANSPORT



### GENERAL SATISFACTION WITH PUBLIC TRANSPORTATION

Chinese respondents are more satisfied with public transport than global survey averages. 68% give a grade between 8 and 10 out of 10 to their city's metro system (vs 41% globally) and 51% to their bus network (vs 36% globally). Preferences for system improvements mirror global averages (42% & 40% name improving frequency and comfort as essential).

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