

FRANCE

KEO
SCOPIE

PARIS • LYON

BENCHMARK CITIES: LONDON • SHANGHAI

The survey in the France zone covers inhabitants in Paris and Lyon and their surrounding areas. 40% of the survey respondents reside within the city and 60% live on the outskirts. In the results presented below, these cities are compared to the two benchmark cities, London and Shanghai, as well as to the averages 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.

88%

France has a high digital penetration rate. **Almost nine out of ten respondents (88%) own a smartphone**, 95% own a computer and 52% own a tablet.

68%

France also ranks highly on public transportation use with **68% of the respondents using public transport weekly** compared to just 51% globally.

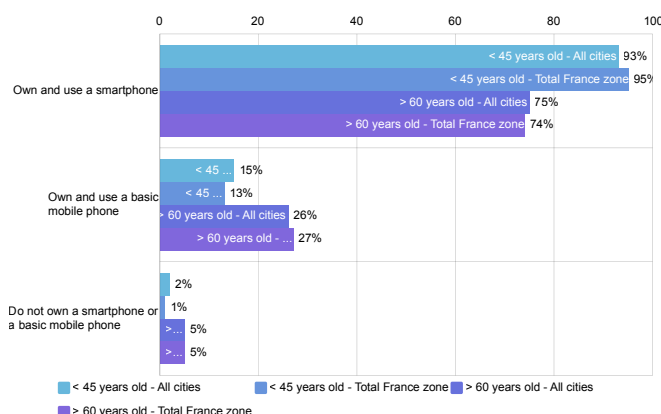
69%

Extensive use of intermodality, with **69% of French respondents declaring they take another means of transportation before public transport** (always or occasionally).

TECHNOLOGY: WHAT ARE THE USES AND ATTITUDES IN FRANCE?

Smartphone owners in France use an average of 5 types of apps at least once a month, primarily for maps, social media and transportation. 73% use maps or transportation apps at least once a month. On average, respondents use three transportation apps, which are mainly used to search the best itinerary (59%), consult maps (56%) and check transport timetables (53%).

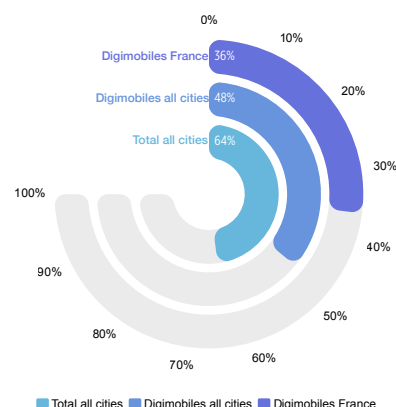
SMARTPHONE AND MOBILE PHONE USAGE BY AGE



THE DIGITAL DIVIDE IN FRANCE

Age and socio-economic situation continues to determine digital use in France. 95% of people under 45 own a smartphone (compared to 74% for the over-60 age group). 3% of people in lower socio-economic categories do not own a mobile phone and 15% have a basic mobile phone (compared to 1% and 11% for higher categories).

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



LESS WORRIED ABOUT THE SPEED OF TECHNOLOGICAL DEVELOPMENT BUT JUST AS WORRIED ABOUT DATA PRIVACY

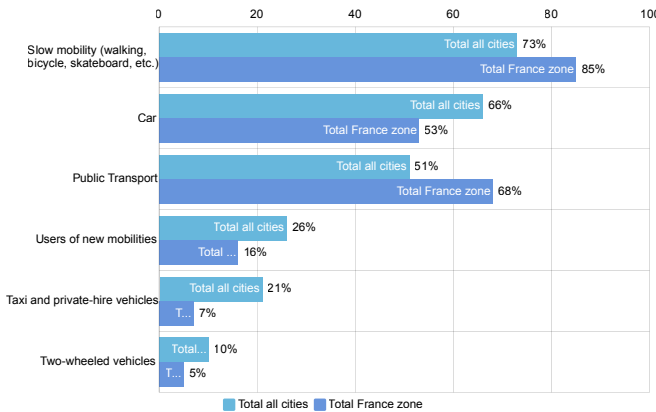
Only 36% of French Digimobiles* fear being outpaced by technological development, compared to 48% globally. However, 70% of the French Digimobiles are concerned about how companies use their personal data, compared to 71% globally.

*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.

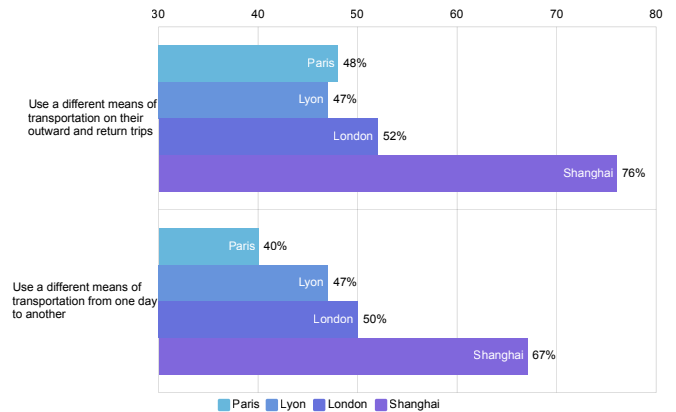
MOBILITY HABITS IN FRENCH CITIES

47% of French respondents say that their work/study days change all the time or occasionally, which is higher than London (42%) but lower than Shanghai (57%). 37% of the respondents travel at least once a week to attend cultural, artistic or sports events, significantly higher than in Shanghai (9%) or London (14%).

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



WHEN IT COMES TO PREFERRED MODES OF TRANSPORT, WALKING IS KING IN FRANCE

For trips of more than 15 minutes, walking remains the favorite means of transport at least once a week with 83%, way ahead of metro (65% in Paris, 43% in Lyon), personal car (47%) and bus (43%). Across all 37 surveyed cities, the figure for walking is only 68%.

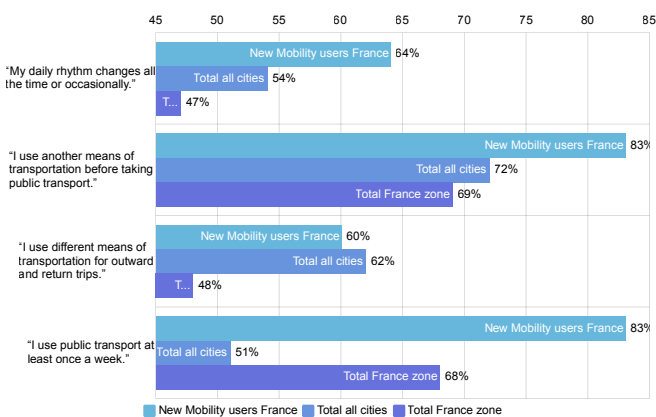
MULTIMODALITY LESS COMMON IN FRANCE THAN IN BENCHMARK CITIES

Multimodality in France is lower than in other zones. Compared to survey respondents in the two benchmark cities Shanghai (76%) and London (52%), only 48% of the French respondents almost always or occasionally use a different means of transport for their outward and return trips.

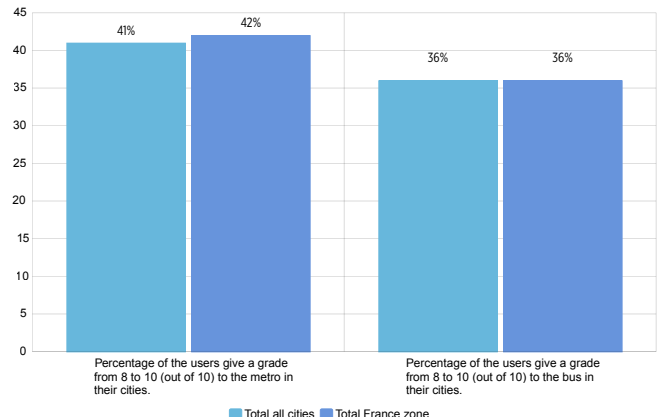
HOW TECHNOLOGY IS INFLUENCING MOBILITY IN FRENCH CITIES

82% of French respondents believe that technology plays an essential role in simplifying their trips. That figure rises to 94% for Digimobiles and 86% for users of new mobilities*. Public transit and new mobility users are especially tech-savvy when it comes to selecting the right means of transport for the right time, accessing several means of transport, and optimizing their trip and the time spent.

CHARACTERISTICS OF NEW MOBILITIES' USERS



USER SATISFACTION LEVEL OF PUBLIC TRANSPORT



WHO ARE THE NEW MOBILITY USERS?

New mobility users (at least once a week) in France are more likely to be Digimobiles (44% compared to 28% for the overall population) and 64% of them have flexible work/study days always or occasionally.

WHAT ARE THE EXPECTATIONS OF FRENCH RESPONDENTS FOR PUBLIC TRANSPORT?

The share of French respondents who would like to see an improvement in the frequency of public transport, including on weekends and evenings, is higher (54%) than in both Shanghai (40%) and London (38%). The next top priority for the respondents is improved comfort of public transit (44%).

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