

INDIA

KEOSCOPIE

MUMBAI • DELHI • HYDERABAD

BENCHMARK CITIES: ALL

The survey in the India zone covers inhabitants in the cities of Mumbai, Delhi, Hyderabad and their surrounding areas. 97% of respondents reside in city centers, and 3% 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.

88%

88% of Indian respondents own a smartphone, close to the worldwide average (89%). However, computer ownership is dramatically lower (24% vs 77% worldwide) as is tablet ownership (4% vs 52%).

84%

84% of respondents in India use public transport at least once a week, much higher than the worldwide average (51%).

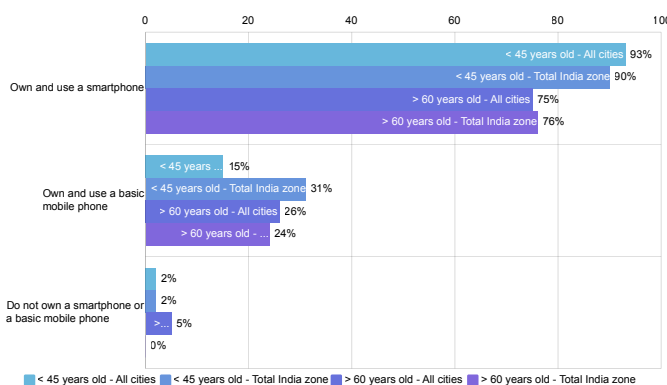
83%

Intermodality is among the highest in India. **83% of Indian respondents always, almost always or occasionally employ other means of transport before public transport** (vs 72% worldwide).

TECHNOLOGY: WHAT ARE THE USES AND ATTITUDES IN INDIA?

Computer ownership is dramatically less widespread (24% vs 77% worldwide) as is tablet ownership (4% vs 52% worldwide). On average, smartphone users in India use 6 types of mobile apps at least once a month, mainly music (85%), shopping (76%), and games (76%).

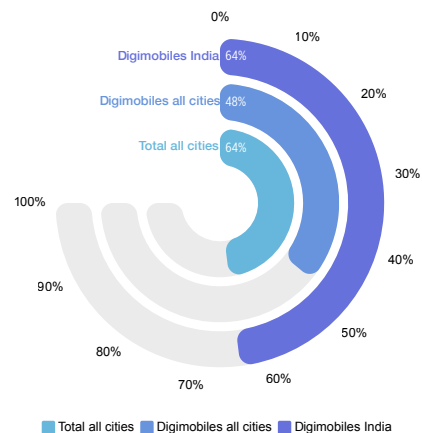
SMARTPHONE AND MOBILE PHONE USAGE BY AGE



DIGITAL DIVIDE ACROSS DEVICES AND POPULATION SEGMENTS

In India, age and income bracket remain the main factors in the digital divide. However, basic mobile phone ownership rates are much higher among those under 45 (31%) than the worldwide average (15%). Notably, 0% of survey respondents over the age of 60 reported owning neither a smartphone nor a basic mobile phone (vs 5% worldwide).

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



INDIANS ARE EMBRACING DIGITAL TECH BUT SHARE DEEP CONCERNS

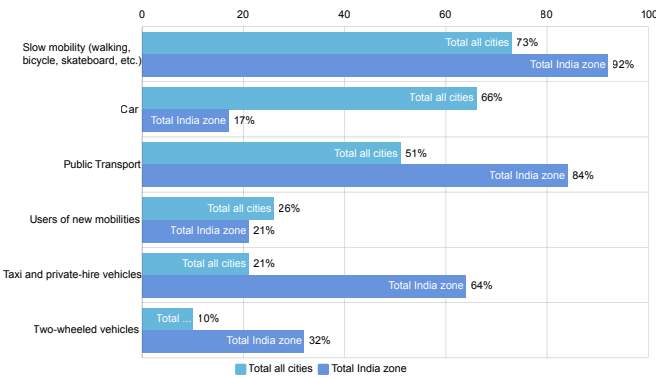
Indian respondents share some deep concerns about the impact of digital technology on their lives. 64% of respondents who identify as Digimobile* feel like they could soon be outpaced by technological development (vs 48% for the Digimobile population worldwide). 67% are worried about the way companies use their personal data.

*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.

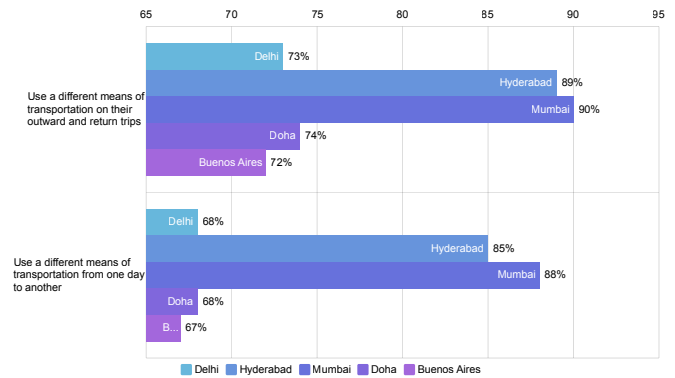
MOBILITY HABITS IN INDIA

77% of Indian respondents say their work/study days change all the time or occasionally, much higher than the worldwide average (54%). This figure varies between cities, from 69% in Delhi to 86% in Mumbai. While 40% report working on Sunday most of the time or occasionally, 60% report working at night time at the same frequency.

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



VERY STRONG PUBLIC TRANSPORT CULTURE WITH EMPHASIS ON TRADITIONAL, INDIVIDUAL MEANS OF TRANSPORT

In India, walking and public transport are overwhelmingly favored: 91% of respondents report walking (for trips of more than 15 minutes only) at least once a week, higher than the worldwide average (68%). Public transport comes in second at 84% (vs 51% worldwide).

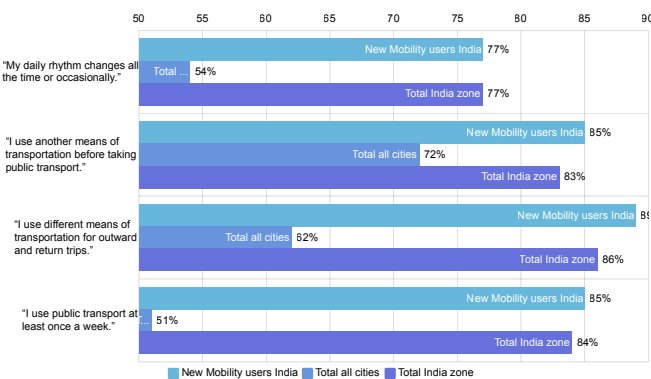
MULTIMODALITY AND INTERMODALITY WIDESPREAD IN INDIA

Multimodality is a strong component of daily life in India. 86% of respondents use a different means of transportation on their outward and return trips (compared to a 62% worldwide average), and 82% use different means of transportation from one day to another.

TECHNOLOGY'S IMPACT ON MOBILITY IN INDIA

Indian respondents overwhelmingly think that technology plays an essential role in simplifying their trips (91%), higher than the worldwide average (83%). Public transport users and new mobility* users are particularly enthusiastic about technology making their journeys simpler and more fluid.

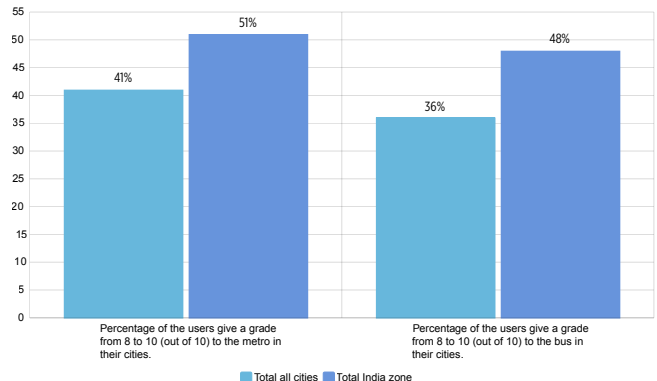
CHARACTERISTICS OF NEW MOBILITIES' USERS



WHO ARE THE NEW MOBILITY USERS?

Indian respondents who use new mobilities at least once a week are more Digimobile than the general population (50% vs. 38%). They also work on weekends (74%) and at nights more often (67%).

USER SATISFACTION LEVEL OF PUBLIC TRANSPORT



ELEVATED USE OF PUBLIC TRANSPORT YIELDS HIGH EXPECTATIONS

Indian respondents are generally satisfied with their public transport: 51% give it a grade from 8 to 10 out of 10, higher than the worldwide average of 36%. This figure varies strongly between cities, however, with 15% in Hyderabad and 78% in Delhi. Indian respondents are more likely to want improvements for public transport, for example, for its frequency (55% vs 45% worldwide) and its comfort (58% vs 40%).

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