

SCANDINAVIA

KEO
SCOPIE

AARHUS • BERGEN • COPENHAGEN • GOTHENBURG • OSLO • STOCKHOLM
BENCHMARK CITIES: BRUSSELS • DÜSSELDORF

The survey in the Scandinavia zone covers inhabitants in the cities of **Stockholm, Gothenburg, Oslo, Bergen, Copenhagen, Aarhus** and their surrounding areas. 85% of survey respondents reside within the city, and 15% in the greater city area. In the results presented below these Scandinavian cities are compared to the benchmark cities of Brussels and Düsseldorf, as well as 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.

89%

89% of survey respondents own a smartphone, the same average rate of ownership as in the total cities surveyed. However, there are strong variations between cities as the rate ranges from 84% in Copenhagen to 97% in Bergen.

72%

72% of Scandinavian respondents are current users of public transport on at least a monthly basis, well above the 62% average in all cities surveyed.

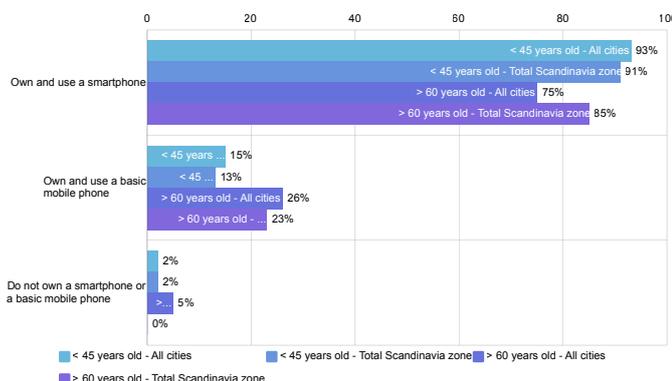
53%

Intermodality is common but less so than in other zones: **53% of Scandinavian survey respondents say they employ other 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 SCANDINAVIA ZONE?

88% own a computer, compared to the survey average of 77%. Tablet ownership, at 56%, is also slightly higher than average (52%). On average, the smartphone users in the region use 6 types of mobile apps at least once a month, compared to 5 in Brussels and Düsseldorf. These are mainly social media (71% of users), banking (70%), maps (60%), media (59%), music (56%), and transportation (53%).

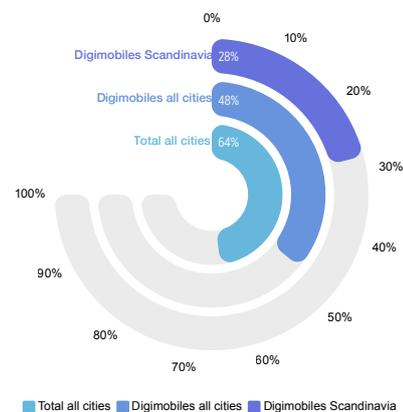
SMARTPHONE AND MOBILE PHONE USAGE BY AGE



A NARROWER DIGITAL DIVIDE AMONG THE OLDER POPULATION

While age and income remain factors of the digital divide, 85% of the over-60 Scandinavian population owns a smartphone (10 percentage points more than the survey average) and 0% reports owning neither a smartphone nor a basic mobile phone. Notably, 97% of respondents over 60 own a computer, compared to 92% in all cities surveyed.

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



CONCERNS ABOUT TECHNOLOGY ARE LESS PREVALENT

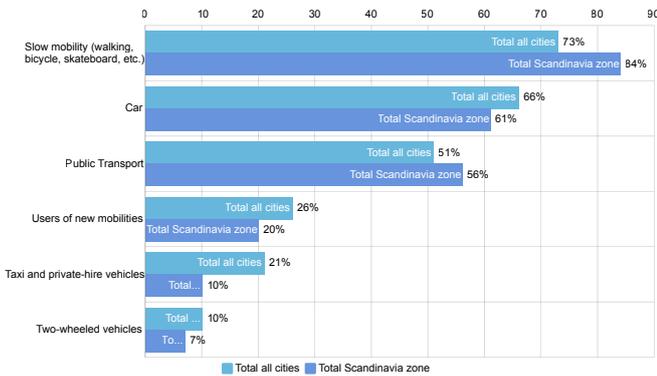
Scandinavian respondents have strong concerns about technology, but these are less widespread than in other zones. Scandinavian Digimobiles* are much less likely than others to feel like they could soon be outpaced by technology and 49% of them worry a lot about the way companies use their personal data, 22 percentage points below the survey average.

*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 SCANDINAVIAN CITIES

57% of Scandinavian survey respondents say their work/study days change all the time or occasionally, a similar rate to all cities surveyed (54%). This figure varies a lot city to city, however, and ranges from 49% in Aarhus to 72% in Stockholm—compared to 67% in Brussels and 53% in Düsseldorf.

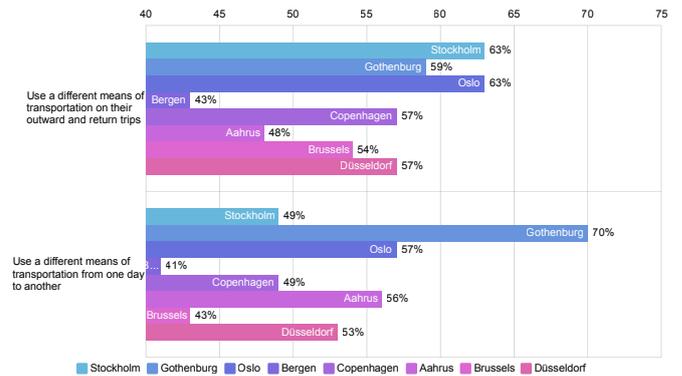
WHICH MEANS OF TRANSPORTATION DO YOU USE AT LEAST ONCE A WEEK?



A MIX OF PERSONAL AND PUBLIC MEANS OF TRANSPORT

The most common mode of travel is walking (trips of more than 15 minutes), with 79% of respondents walking at least once a week. 49% of Scandinavian respondents overall report driving their car (35% in Stockholm and 62% in Bergen). Then comes the bus (from 31% in Aarhus to 56% in Oslo). 31% also report using their own bicycle at least weekly.

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



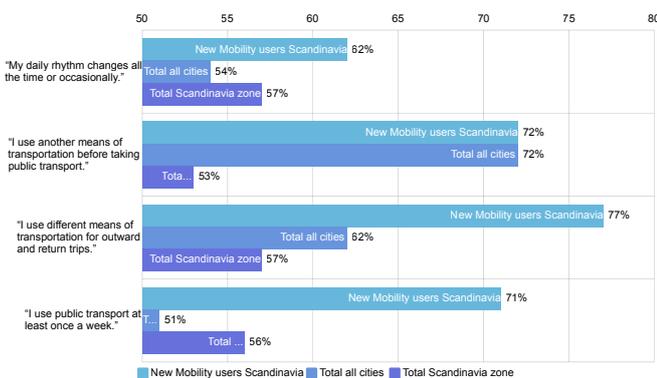
INTERMODALITY AND MULTIMODALITY BELOW SURVEY AVERAGES

53% of Scandinavian respondents always or occasionally use other means of transport before public transport, compared to 73% in Brussels. Multimodality varies strongly between cities: for instance, 41% of Bergen respondents use a different means of transportation from one day to another, compared to 70% in Gothenburg.

TECHNOLOGY'S IMPACT ON MOBILITY IN SCANDINAVIAN CITIES SURVEYED

83% of Scandinavian respondents think technology plays an essential role in simplifying their trips, a figure rising to 96% for Digimobiles, 87% for public transport users, and 80% for users of new mobilities*. 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.

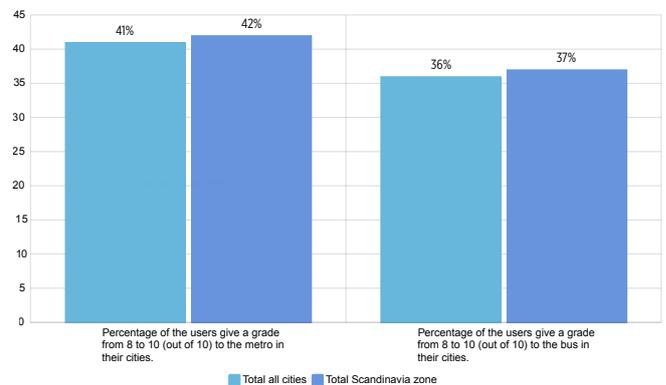
CHARACTERISTICS OF NEW MOBILITIES' USERS



WHO ARE THE NEW MOBILITY USERS?

Scandinavian respondents who use new mobilities at least once a week are more digimobile than the rest of the population (33% vs. 27%), with more fragmented daily work/study routines. Much more intermodal and multi-modal than other Scandinavian respondents, they are also much more likely to use public transport.

USER SATISFACTION LEVEL OF PUBLIC TRANSPORT



LEVELS OF SATISFACTION AND EXPECTATIONS FOR PUBLIC TRANSPORT VARY

While 42% of Scandinavian respondents are satisfied with their metro (compared to 48% in Brussels and 11% in Düsseldorf), this figure varies wildly from city to city (e.g. from 53% in Copenhagen to 9% in Aarhus). They also place a slightly lower importance on public transport improvement than the average of surveyed cities.

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