UNITED KINGDOM

KEOSCOPIE

CARDIFF • GLASGOW • LEEDS • LONDON • MANCHESTER

BENCHMARK CITIES: **BOSTON • MELBOURNE**

The survey in the UK zone covers inhabitants in the cities of **Cardiff, Glasgow, Leeds, London, Manchester and their surrounding areas**. 65% of survey respondents reside in city centers, and 35% in the greater city area. In the results presented below these cities are compared to Boston and Melbourne as benchmarks, 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.

87%

There is widespread adoption of digital technology among UK survey respondents, **87% own a smartphone**, 75% own a computer (vs 77% worldwide) and 61% own a tablet (vs 52%).

45%

Only **45% of UK respondents are weekly users of public transport**, compared to 51% of respondents globally.

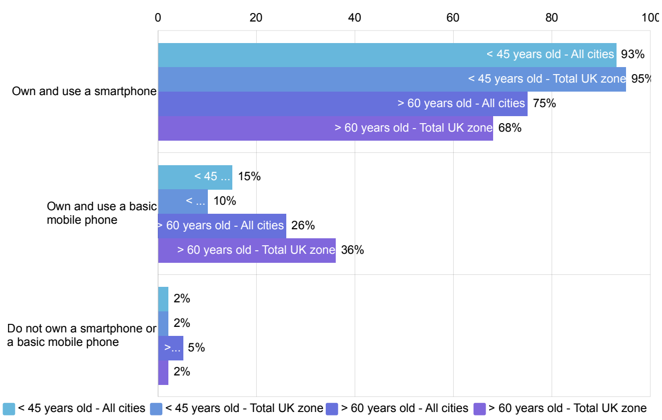
70%

Intermodality widespread, with **70% of UK respondents declaring they take another means of transportation before public transport** (always or occasionally).

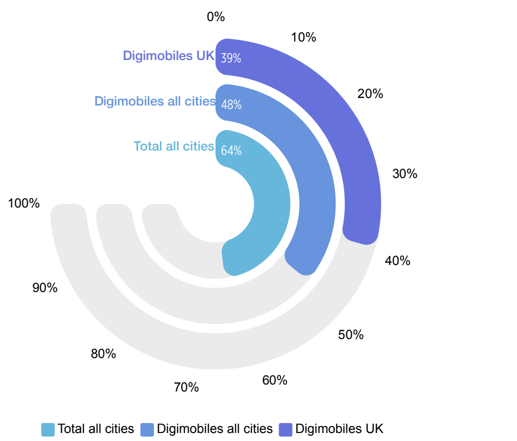
TECHNOLOGY: WHAT ARE THE USES AND ATTITUDES IN THE UK?

On average, smartphone users in the UK use 6 types of mobile apps at least once a month (compared to 5 in Melbourne and 6 in Boston), mainly social media (70% of UK respondents, vs 68% worldwide), maps (62% vs 59%), banking (59% vs 58%), music (51% vs 56%), shopping (52% vs 51%) and media (48% vs 46%).

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 RESISTANT DIGITAL DIVIDE BY AGE AND INCOME

In the UK, age and income brackets remain the main factors in the digital divide. While 95% of the surveyed population under 45 years old owns a smartphone (vs 93% in total cities surveyed), this figure drops to 68% for those over 60 years old (vs 75% in total cities surveyed).

COMFORTABLE WITH DIGITAL LIFE BUT CONCERNS ABOUT USE OF DATA

39% of UK respondents who identify as Digimobile* feel like they could soon be outpaced by technological development (vs 48% for the Digimobile population worldwide). UK Digimobile respondents are also concerned about the way companies use their personal data (73% vs 71% among Digimobiles 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.

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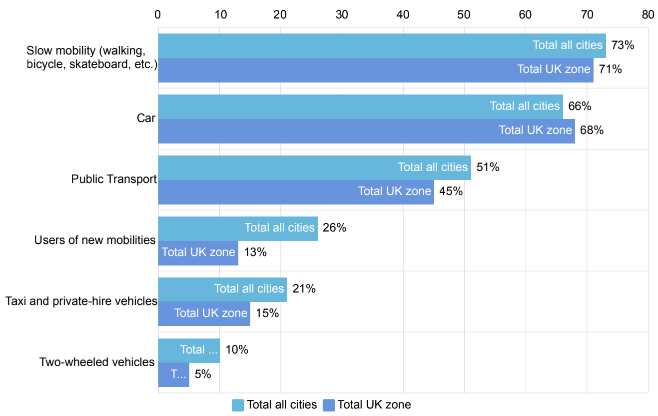
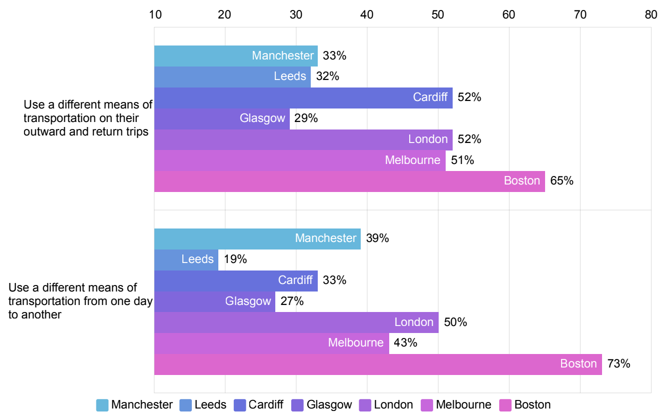
MOBILITY HABITS IN UK CITIES

48% of respondents say their work/study days change all the time or occasionally, compared to 54% in all surveyed cities, 47% in Melbourne and 54% in Boston. They are almost as likely to work from home at least once a week (25%) than all surveyed cities (26%), with inter-city variations between 16% in Glasgow, 28% in Cardiff and 31% in London.

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 THE FAVORED MEANS OF TRANSPORT

On average, UK respondents mirror their worldwide counterparts in their top three choices of means of transport used at least once a week: walking (68%, trips of more than 15 minutes only, vs 68% for all surveyed cities), driving their own car (55% vs 55%), and the bus (34% vs 37%).

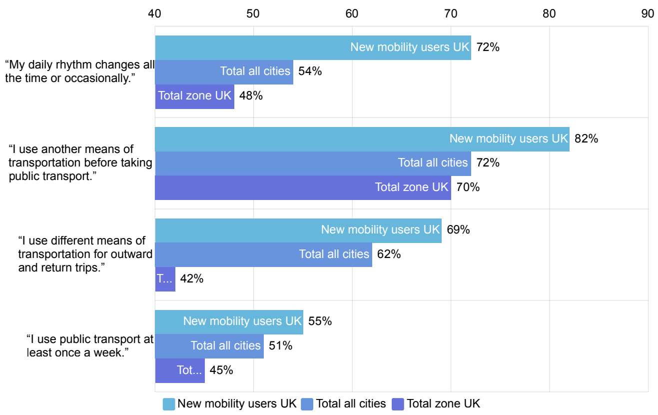
MULTIMODALITY LESS WIDESPREAD IN THE UK

Multimodality is less widespread in the UK (42%) compared to the global average (62%). In London the percentage rises to 52%, versus 51% in Melbourne and 65% in Boston.

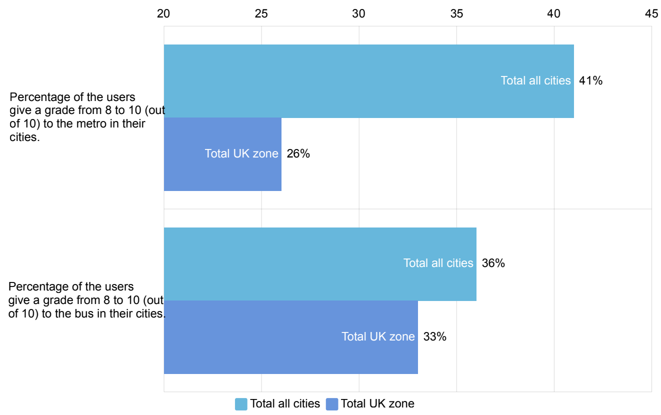
HOW TECHNOLOGY IS INFLUENCING MOBILITY IN UK CITIES

75% of UK respondents think that technology plays an essential role in simplifying their trips, slightly less than the average of all surveyed cities (83%). Public transport users and new mobility* users are particularly enthusiastic about technology making their journeys simpler and more fluid, by helping them to select the right mode of transport for the right time, to access different transport modes, 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?

New mobility users in the UK have a work/study schedule that changes all the time or occasionally (72% vs 48% for the UK zone), and 60% (vs 46% total UK zone) of them report working on Sundays and 61% (vs 31%) report working at night.

UK RESPONDENTS' SATISFACTION LEVEL WITH PUBLIC TRANSPORT

UK respondents grade their bus service higher in surveyed cities (33% give it a grade from 8 to 10 out of 10 vs 36% in all cities surveyed) when compared to their metro infrastructure (26% give their metro a grade of 8 to 10 out of 10 vs 41% worldwide).

Graphs programmatically created with Amcharts libraries

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