

USA

BOSTON • LAS VEGAS • LOS ANGELES • NEW ORLEANS

BENCHMARK CITIES: LONDON • SYDNEY

The survey in the USA zone covers inhabitants in the cities of Boston, New Orleans, Las Vegas, Los Angeles and their surrounding areas. 53% of survey respondents reside in city centers, and 47% in their greater city area. In the results presented below these cities are compared to the benchmark cities of London and Sydney, 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.

88%

Digital technology adoption is widespread in the USA zone: **88% of respondents own a smartphone**, 76% own a computer and 53% own a tablet.

29%

Only **29% of USA respondents are currently weekly users of public transport**, well below the 51% global study average.

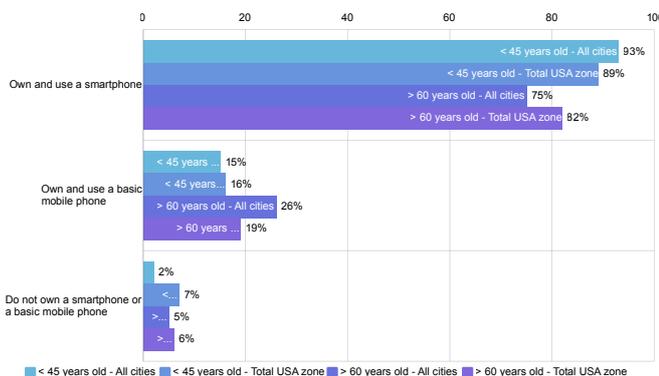
78%

Intermodality is extensive, with **78% of USA respondents declaring they employ other means of transport before public transport** (always or occasionally).

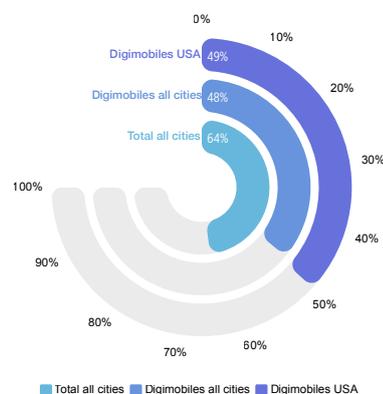
TECHNOLOGY: WHAT ARE THE USES AND ATTITUDES IN THE USA ZONE?

88% of USA zone survey respondents own a smartphone, 76% own a computer and 53% own a tablet. On average, smartphone users in the US use 6 types of mobile apps at least once a month (compared to 5 in London and Sydney), mainly social media (70% of users), music (60%), maps (57%), games (56%), banking (54%), and shopping (53%)

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."



THE DIGITAL DIVIDE REMAINS DESPITE WIDER DIGITAL DEVICE OWNERSHIP

The USA zone survey shows age and income remain the main factors in the digital divide. Smartphone ownership among the over-60 population is higher in this zone (82%) than the survey average (75%), but the proportion of low-income respondents who own neither a smartphone nor a basic mobile phone is significantly higher, at 9% vs. 4%.

ADOPTION OF DIGITAL TECH DOES NOT COME WITHOUT SOME CONCERNS

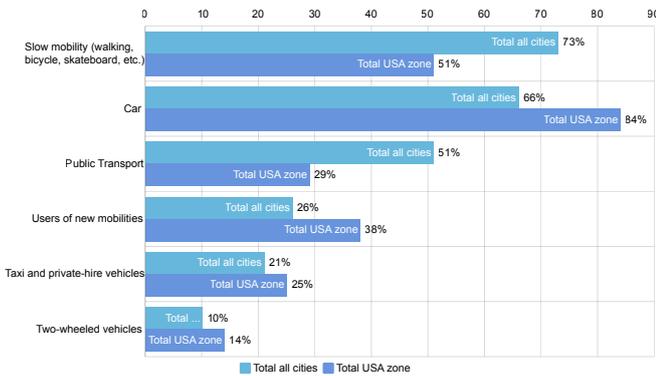
49% of USA respondents who identify as Digimobiles* feel like they could soon be outpaced by technology, and 67% state the way companies use their personal data worries them a lot. 68% of all USA respondents, moreover, say that they do not find the non-physical aspects of going digital very reassuring (vs. a 64% global study 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.

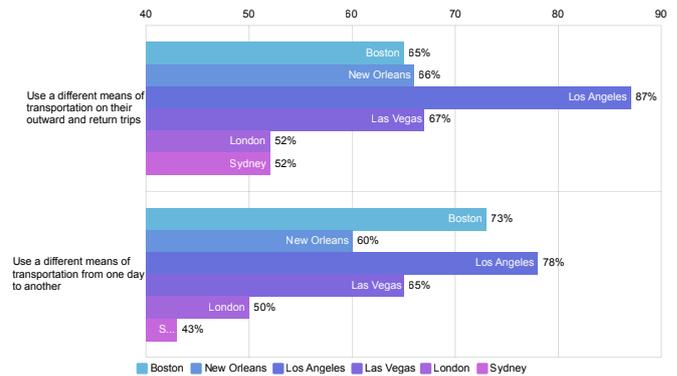
MOBILITY HABITS IN USA CITIES

54% of USA respondents say their work/study days change all the time or occasionally, same as the global study average. However, 26% say their work/study days change all the time, with little variations between cities: ranging from 23% in Boston to 29% in New Orleans, compared to 18% in Sydney and 16% 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



CARS REIGN AMID LOW PUBLIC TRANSPORT USE & EMERGING NEW MOBILITIES

Among USA respondents, weekly car use is 16 percentage points higher than the global average at 71% while walking for more than 15 minutes is 25 percentage points below, at 43%. The third most common mode of travel for them is as passengers in the car of someone they know (33%). Carpooling (18%) is almost as common as using the bus (18%) or metro (16%).

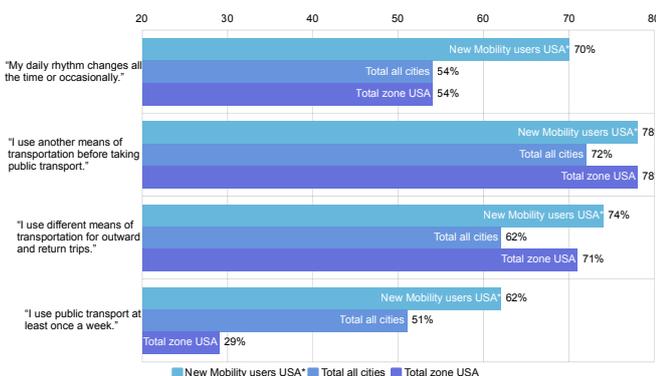
MULTIMODALITY IS AN INGRAINED FACT OF LIFE

71% of USA respondents always or occasionally use different means of transport on their outward and return trips, compared to 62% in all surveyed cities. 70% use different means of transportation from one day to another, 13 points more than the average in all cities studied.

HOW TECHNOLOGY IS INFLUENCING MOBILITY IN THE USA CITIES SURVEYED

83% of USA respondents think technology plays an essential role in simplifying their trips, an even higher figure among Digimobiles (90%), weekly new mobilities* users (87%) weekly public transport users (85%). 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.

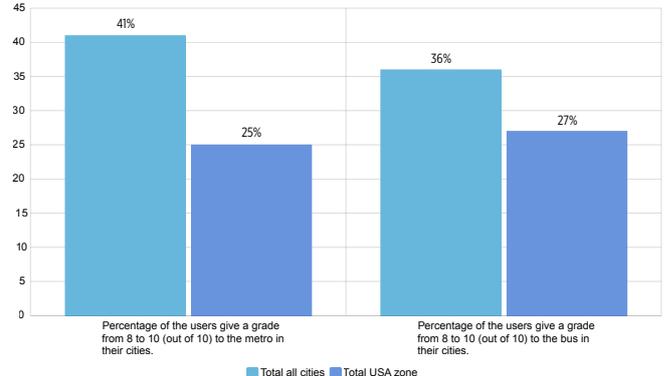
CHARACTERISTICS OF NEW MOBILITIES' USERS



WHO ARE THE NEW MOBILITY USERS?

Compared to the rest of the USA population surveyed, users of new mobilities at least once a week include a slightly higher proportion of Digimobiles (32%). They are much more likely to have changing work or study routines, and more likely to work at night. They are also far more likely to use public transport at least once a week.

USER SATISFACTION LEVEL OF PUBLIC TRANSPORT



POOR SATISFACTION WITH PUBLIC TRANSPORT, MIDDLING EXPECTATIONS

USA zone respondents rate their public transport lower than other survey respondents: 25% give their city's metro system a grade between 8 and 10 out of 10, compared to a 41% average in all cities studied. However, they are not more likely to have higher expectations for improvements in the frequency or comfort of their public transport.

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