

KEO SCOPIE INTERNATIONAL

June 2019

Findings from the global and local study that offer
a new perspective on mobility challenges in our cities.

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KEOLIS

KEOLIS & KEOSCOPIE

At Keolis, we strive to do more than simply analyse citizens' travel habits and attitudes towards public and private transportation solutions.

We believe it is crucial to understand the impact of the numerous societal transformations that are underway today (changing working patterns, increased digital usage, rise in life-expectancy, regional developments).

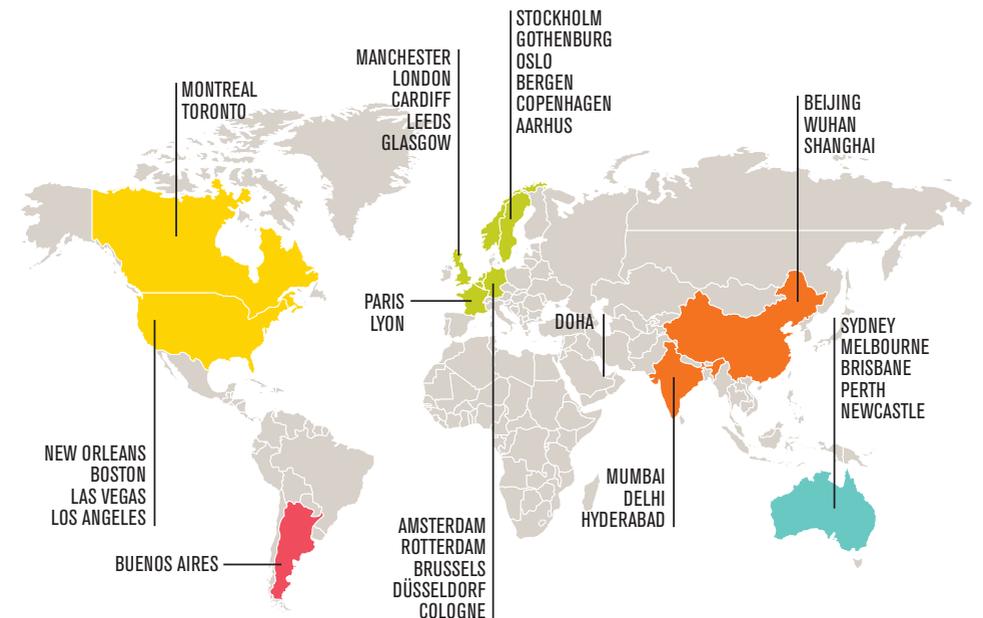
Our in-depth knowledge of local specificities combined with this global insight allows us to co-construct solutions with our Public Transport Authority partners across the globe. This in line with our commitment to "Thinking Like a Passenger", our approach to continuous improvement through collective design.

Keoscopie International is the culmination of a structured prospective research and analysis process. This began with the launch of Keoscopie studies in France since 2007 and extended globally in 2017 with the World Mobility Report, focusing on the digital innovations and new mobility trends across 13 major cities.

A UNIQUE METHODOLOGY

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.





70%

of smartphone owners **use a transport or map application at least once a month**. But digital outsiders still make up a considerable part of the population: **20% of respondents** classify themselves as “offline*.”

*Whilst they do own a classic mobile phone or a smartphone, they use it exclusively for communication purposes (calling or text messages), or very occasionally to take photos.

1/3 of respondents in Rotterdam

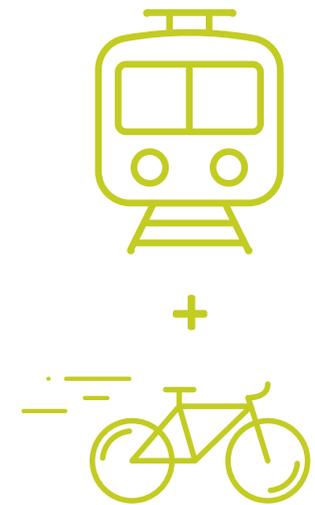
are “offline” compared to just

1 in 10 in Hyderabad.

WIDESPREAD ADOPTION OF INTERMODALITY AND MULTIMODALITY

Using multiple transport methods for similar journeys is extremely common: **62% of respondents** use different modes for their outward and return trips (**87% in Los Angeles** whilst **42% in the UK**) and **57%** change modes from one day to another (**88% in Mumbai** vs. **28% in Amsterdam**).

72% of public transport users* access the network using (always or almost always) another means of transportation.



*At least once a month

VOICE ASSISTANCE

1 in 4

respondents (26%) has already used voice assistance to search for information. This figure increases to more than one-in-three (36%) amongst the under-25s.

However, there are significant differences between countries.

Voice commands are used by:

55% OF RESPONDENTS
IN DELHI compared to **44%** IN BOSTON
23% IN PARIS AND LYON
AND JUST **8%** IN AMSTERDAM

NEW MOBILITY



77% OF CHINESE RESPONDENTS use new mobility* solutions at least once a month, compared to JUST **26%** OF SCANDINAVIAN RESPONDENTS

The new mobility market is highly promising: 65% of respondents declare they would potentially use new mobility solutions, with figures reaching 90% in China.

*Private driver services, electric bicycle, car sharing, carpooling, folding scooter, Segway, electric unicycle, hoverboard



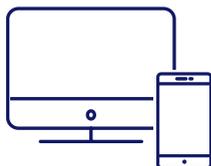
+
= PUBLIC TRANSPORT
NEW MOBILITY
A PERFECT MATCH

New mobility users (at least once a week) are greater users of all kinds of public transport (70% compared to only 51% for the overall population).



For many years now, Keolis has consolidated its position as a leader in integrated mobility services, providing tailor-made transport solutions for all citizens and all types of market.

The signature 'More ways, More life!' embodies this vision and reflects Keolis' commitment to refining and enhancing its understanding of the social and technological developments that influence mobility.



See all the results on our website:
keoscopie.keolis.com

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