June 2019
Findings from the global and local study that offer a new perspective on mobility challenges in our cities.
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 is in line with our commitment to “Thinking Like a Passenger”, our approach to continuous improvement through collective design.

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.
1/3 of respondents in Rotterdam are “offline” compared to just 1 in 10 in Hyderabad.

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.
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
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.

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).

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