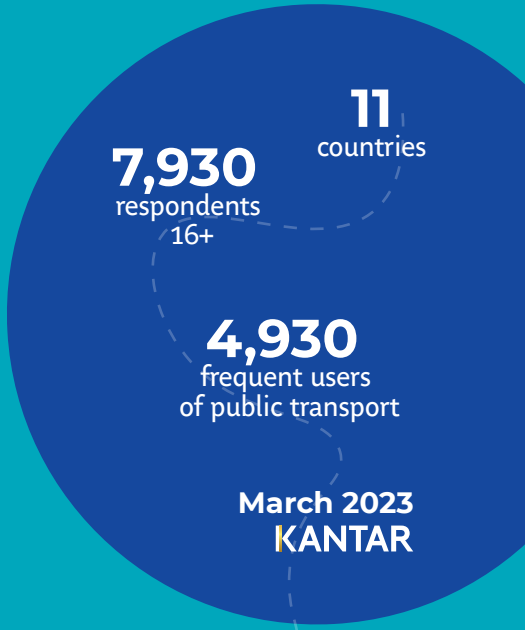


International Public Transport Passenger Survey

UNDERSTAND PASSENGERS' EXPECTATIONS AROUND THE WORLD

At RATP Dev, we place passengers at the core of everything we do.

They are what drives us, and their expectations guide the design of our offers and services. We have conducted a major international survey across 11 countries to better understand passengers' expectations towards public transport. This survey has provided us greater insights on both global and local needs, enabling us to deliver experiences in line with specific expectations.



3 KEY TOPICS ADDRESSED

ROLE OF PUBLIC TRANSPORT IN THE CITY

DRIVERS AND BARRIERS TO USE

PASSENGER PREFERENCES AND EXPECTATIONS



People are globally positive about the role of public transport across markets, even in areas where the car still prevails. It is not just about the competitive cost and speed, people also value social, quality of life and environmental benefits.

In regard to reducing the environmental impact of transport, public transport was considered a much better option than electric cars in both European and Asian-Pacific market.

PUBLIC TRANSPORT CONTRIBUTES TO BETTER CITY LIVING

FREEDOM TO MOVE

65%

agree that public transport offers everyone the possibility to move around

QUALITY OF LIFE

61%

agree that it contributes to improving the quality of life in the city

 66% Sydney

ECOLOGICAL

55%

agree that **public transport** is better for the environment

 62% France
#1 benefit



PUBLIC TRANSPORT ROLE IN TACKLING CLIMATE CHANGE IS ACKNOWLEDGED GLOBALLY

64%

of respondents believe that public transport is useful in fighting climate change

 78% in Singapore

 70% in Greater Paris Region

45%

consider that public transport contributes to reducing the environmental impact of transportation



vs only **36%** for electric cars



The main reason passengers use public transport in Europe and Sydney (where car ownership is high) is to avoid traffic and parking issues, whereas in Africa and East Asia (where owning a car is more expensive) it is more so economic reasons.

Across all markets, travel time is perceived as a transversal barrier to public transport use. However, main barriers vary according to market and user profile. Proximity to stops is a key limit in markets with a limited transport offer, while overcrowding is seen as an important barrier in markets with a high rate of usage. In Johannesburg, safety is cited as a key concern, and in London the cost of public transport was seen as a key determinant.



CONVENIENCE AND COST BENEFITS DRIVE PUBLIC TRANSPORT USE

52%



In Europe and Sydney, where car ownership is high, the No.1 reason is to **avoid traffic / parking issues**

54%



In East Asian and African metropolises where car ownership is low, people cite the **cost benefits as their primary motivation**



BARRIERS TO USAGE VARY DEPENDING ON PUBLIC TRANSPORT OFFER*

GLOBAL

SPEED

in all markets

26%

... takes too much time

LOCAL

PROXIMITY

in areas with limited public transport

34%

nominate it is not available near the area they are travelling
US, Riyadh and France (exc. Greater Paris Region)

CROWDING

in markets with high rates of public transport usage

33%

cite public transport as being too crowded
Singapore, London, Greater Paris Region, Sydney, Cairo and Casablanca

FEELING SAFE

in Johannesburg

46%

say they they do not feel safe on public transport

→ Index 270 vs total

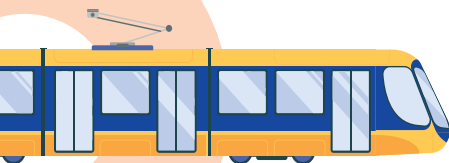
COST

in London

27%

consider that it is too costly

→ Index 270 vs total



Human presence is important for passengers to get assistance when they have an issue and to feel safer. Regarding safety, passengers also expect more video surveillance. In Cairo and Casablanca, the No. 1 priority for passengers is combatting fare evasion effectively.

Regular and occasional users have different priorities in additional services desired: access to internet for regular users who spend more time in public transport, vs pay-as-you-go options for occasional users who prefer more convenient and economic solutions in line with their travel behaviour. Both are interested in crowding information, highlighting the importance of comfort and less crowded transport.

PASSENGERS EXPECT A HUMAN PRESENCE FOR ASSISTANCE AND TO FEEL SAFER

INFORMATION AND ASSISTANCE

64%

consider that it is important to be able to speak to a person when they have an issue



SAFETY

To feel safer, people expect to see and have...

...more video surveillance

47%

...more human presence

44%

...combat fare evasion more effectively in Cairo and Casablanca

51%

MOST WANTED ADDITIONAL SERVICES RELATE TO COMFORT AND CONVENIENCE

Within 20 ideas tested



1 Access to internet

– particularly in markets with high rates of public transport usage



2 Pay-as-you-go

– particularly in markets with more occasional users such as Johannesburg and Tuscany



3 Passenger load information

– especially appreciated in Hong Kong, Singapore, Greater Paris Region and Tuscany