



EXPLORER

Today's Challenges
for Tomorrow's Mobility

2018 Survey Results

Introduction

As an operator and global integrator of mobility, Transdev gives people the freedom to move whenever and however they choose. We are proud to provide 11 million passenger trips every day thanks to efficient, easy-to-use and environmentally friendly transportation services that connect people and communities.

Our approach is rooted in long-term partnerships with local governments and transit agencies. Our commitment has always been to better understand their challenges, anticipate their needs and support their long-term vision. Since 2009, the Transdev Multi-Country Barometer Survey of transit agency leaders has been designed for this purpose and has produced a benchmark over time to assess mobility evolution and sometimes... revolution.

In the 2018 edition, key transit decision-makers from 5 countries – the United States, Canada (for the first time), Australia, New Zealand, and Sweden – were interviewed by Ipsos, a worldwide market research firm. The diversity of public transit policies in economic, demographic, and infrastructure contexts provide a wide-ranging view about the way transit authorities wish to shape mobility in the future. This 5th edition of our survey highlights a major inflection point in many aspects of our work: acceleration of digital solutions, growing importance of customer-centricity, interest in First and Last Kilometer solutions and more.

We thank the transit leaders who kindly agreed to share their views with us and are pleased to bring these results to our industry. The rapid evolution of mobility is rich with opportunity. Our Transdev teams are pleased to share these results, but more importantly, to demonstrate how our solutions are shaped by the needs of our passengers, clients, local communities and governments. We are inspired by the relentless pursuit of the safest, most innovative and sustainable mobility services.



Thierry Mallet

Chairman and Chief Executive Officer of Transdev Group



Arthur Nicolet

Chief Executive Officer of Transdev Canada

We are a team of people serving people to achieve better mobility. We are the mobility company.

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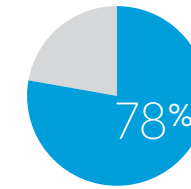
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1 Passenger Experience

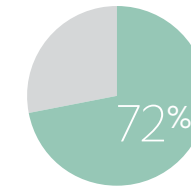
When asked about their most important goal for improvement, transit leaders rate the passenger experience first. Over 90% of respondents rank it as most important. What is more, when asked what they would do to **take action in improving services to passengers**, respondents answer quite comprehensively and consistently across countries, including:

- Improving service to passengers and their satisfaction
- Enhancing courtesy and empathy of staff and instilling a service culture
- Providing a digital platform or app with all-in-one functionality for passengers.

On average, 66% of respondents see private sector operators as potential partners to help them implement such programs. In addition, a significant percentage



Transit leaders interested in using data science to develop or increase their knowledge about customers.
(Average - 5 countries)



Transit leaders interested in open data on mobility from all sources and stakeholders.
(Average - 5 countries)

believe that private sector partners could help measure customer satisfaction (67%), manage customer complaints (67%), handle customer feedback via social media channels (49%), and oversee call centers (44%).

Improving Transit System:

	Aus / NZ	U.S.	Canada	Sweden
Likelihood to act on improving the passenger experience in the next 3 years.	87%	98%	93%	91%

Interest in Mobility Services:

Currently testing or interested in testing in the next 3 years

	Aus / NZ	U.S.	Canada	Sweden
Using data science to develop or increase customer knowledge.	77%	80%	76%	79%
Open data on mobility from all stakeholders.	61%	71%	70%	84%

There is a strong link between improved passenger experience and ridership growth. Plans to prioritize ridership-building range from 80% to 100% across the five countries, even though ridership trends vary, with slight declines in the U.S. and growth in the other countries. Some 62% plan to redesign their bus services and routing, 80% plan to deploy a diversity of payment channels and 58% to 79% plan to implement ridership-building marketing programs.

We have lower ridership and low density — this creates a challenge for cost recovery. — a Canadian transit decision maker

We need to find a combination between public and private transport to meet the inhabitants' demands and make it easier to travel. — a Swedish transit decision maker

FOCUS – CANADA

At Transdev Canada, we keep passengers at the heart of everything we do. At Limocar, our express line between Montreal and Sherbrooke (Quebec), our feedback management program, Listen (which tracks, analyzes and resolves interactions with passengers), has helped improve services.

This has resulted in a decrease of the volume of complaints (15% from 2017 to 2018). We also accelerated the implementation of digital sales channels to allow easier access for our passengers. Today 30% of our sales come from our e-boutique. Based on passenger expectations, we will soon launch our app showcasing real-time

information, status of the networks as well as special offers. Our efforts have been rewarded by the fact that 96% of Limocar's customers recommend its service and we have seen a 10% increase in ridership in the first nine months of 2018.



2 Modal Integration

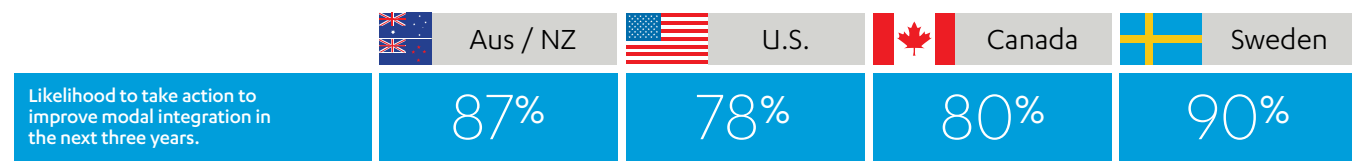
This is the second priority of transit agency leaders. A range of 78% to 90% across the 5 countries plan to take action to improve modal integration in the next three years. A high percentage expressed a commitment to the following:

- Providing seamless end-to-end passenger journeys (67%)
- Re-designing their bus system (61%)
- Implementing or expanding ride-hailing (46%)
- Implementing alternative modes (53%)
 - car share, bike share, car pools or ride sharing.

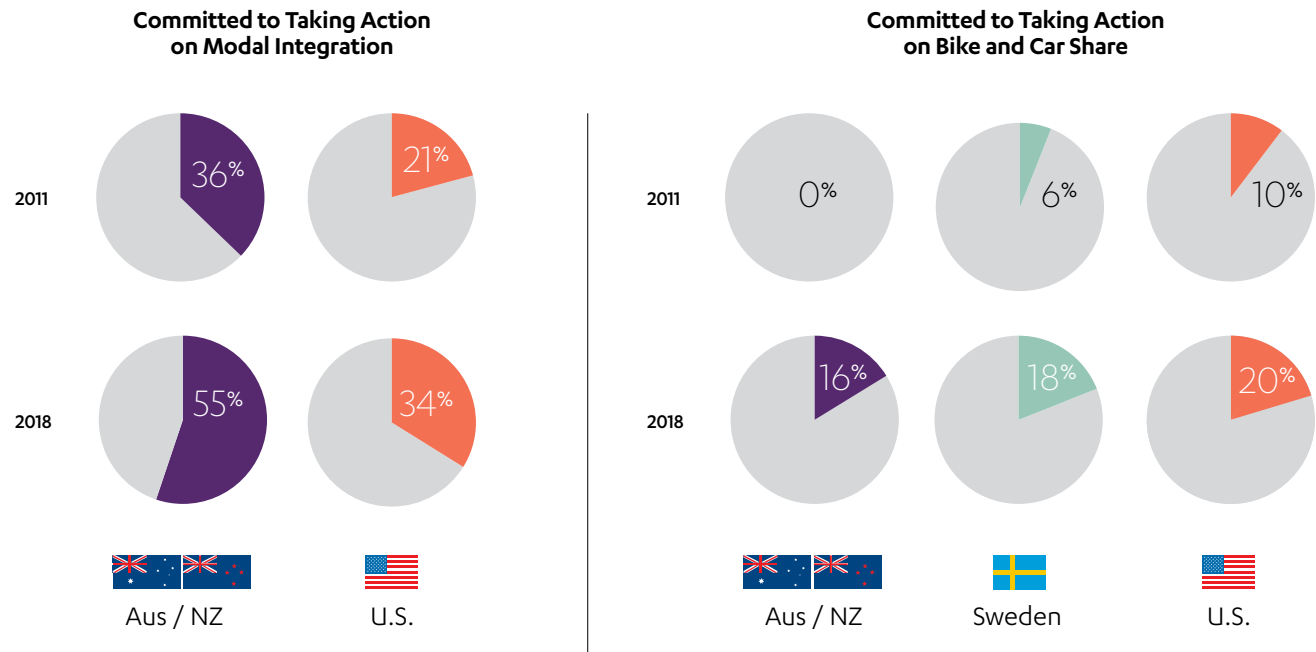
A high percentage look to private sector operators for proven intermodal expertise (64%).

“We need to evolve with changing rider trends and people’s interest for more on-demand services. Customers want service that is immediate, convenient, flexible and affordable. They are adopting ride share services for this reason, but ride share services are not always affordable or accessible. Our challenge is meeting the needs of these customers in a way that works and at a cost customers are able and willing to pay and that can be supported by taxpayers.”

— a Canadian transit decision maker

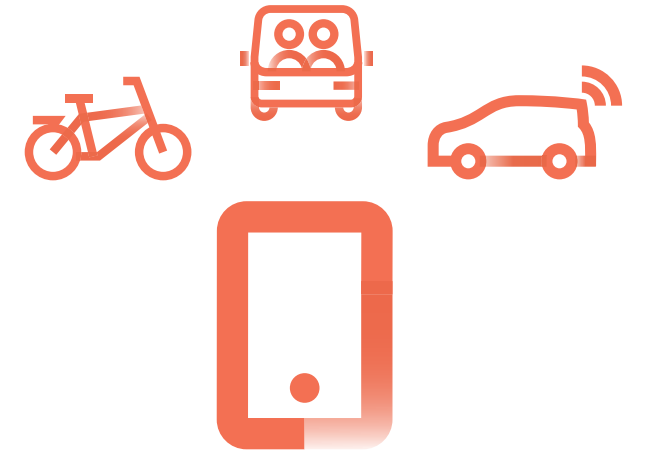


From 2011 to 2018, there is a significant increase in commitment to prioritizing modal integration:



3 Mobility as a Service (MaaS)

We focused the 2018 barometer to include significant attention in the new mobility space, given the massive changes underway in our sector. This includes “Mobility as a Service” (MaaS) which is defined as a single place to plan, book and pay for mobility, combining public transit, car-pooling, ride-sharing, ride-hailing, bike-sharing and other services. Interest in MaaS is very high in all countries, including 72% in Sweden and 74% in the U.S. either taking action toward implementing MaaS or interested in developing it.

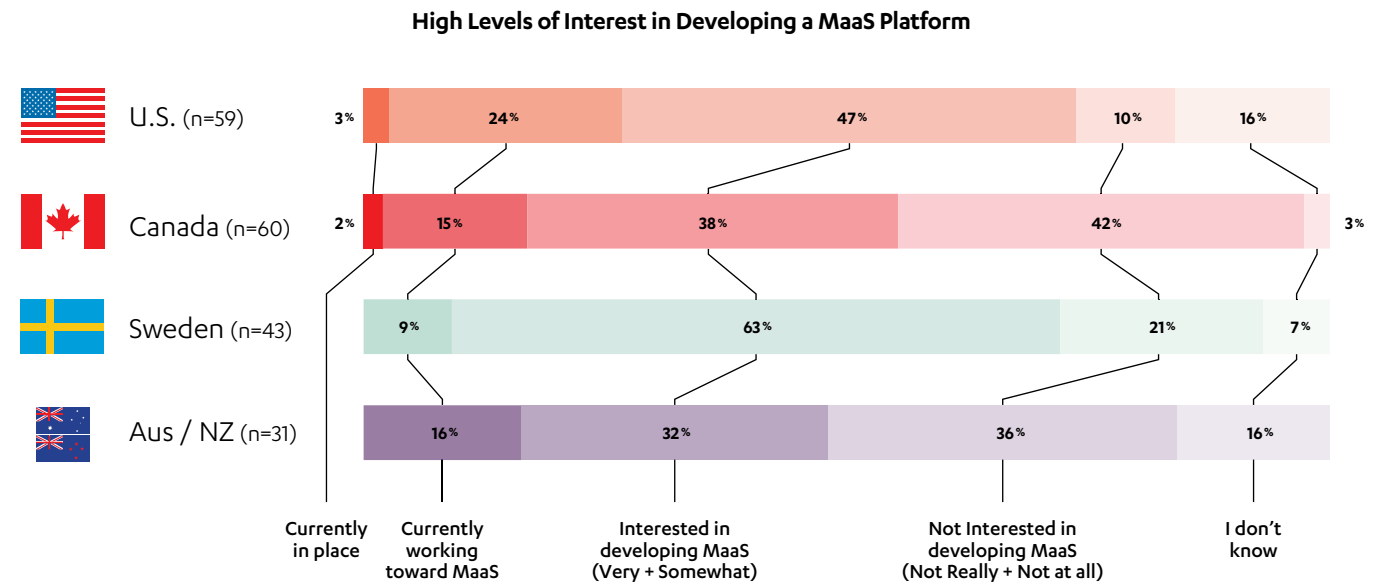


“Keeping up with technological innovation to remain customer friendly and cost effective.”

— a U.S. transit decision maker

Relatively fewer transit leaders in Canada and Australia (53% and 48% respectively) are working toward MaaS or interested in doing so. Some 11% of all respondents don’t yet know if they are interested in developing a MaaS platform.

Transit leaders in the U.S. and Sweden see MaaS as a major future opportunity for our industry and for passengers.



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Passengers today expect seamless end-to-end mobility where all modes are well integrated. With Canadian transit leaders extremely committed to **increasing ridership (95% of Canadian respondents)**, all topics related to integration, quality of service and experience, as well as seamless mobility will make

the difference in the future. In the Toronto area, Cityway, Transdev’s software development subsidiary, has created Triplinx, an easy to use intermodal trip planner providing real-time service information for 19 transit agencies in the Greater Toronto and Hamilton area. This has helped provide a one-stop shop

of information on value-added services such as real-time schedules, interactive maps with live vehicle visualization, GPS guidance and tracking features, service updates on all partners. Passenger satisfaction with this multi-media platform has pushed it to a 4.5 rating in the App Store.



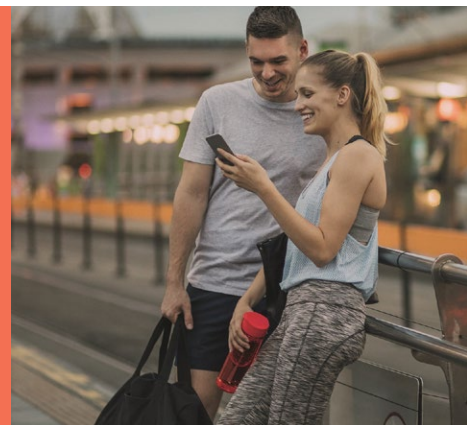
FOCUS – CANADA

At Transdev, we have the vision that MaaS shall integrate all forms of transport services into a single mobility platform accessible via a smartphone application and including a unique payment channel. MaaS should be the best value proposition as an alternative to the convenience of cars.

Our eco-system of partners and expertise in real-time and predictive planning, payment platforms and UX know-how will help this vision come true.

In France, Transdev has created the Mobility Account for Mulhouse, a one-stop user interface letting

customers book and use all modes (bus, tram, car sharing, bikes and carpark) with a single invoice at the end of the month. This is a first in Europe.

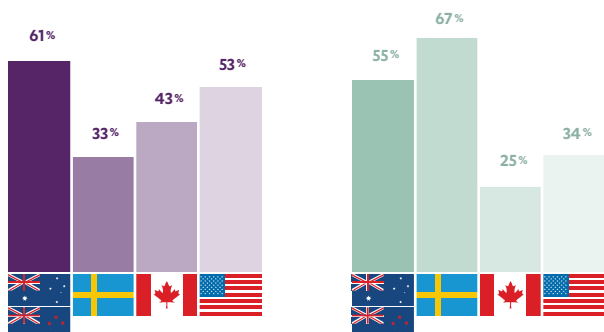


4 Emerging New Mobility Options

There are new technologies emerging which our training system must be on top of so that we are learning about the innovation and new technologies that are emerging in the industry. — a Australian transit decision maker

Interest in testing autonomous vehicles

Australia / NZ (n=31), Sweden (n=43), Canada (n=60), U.S. (n=59)



As a First and Last Kilometer solution (shuttle, transport on demand, and targeting populations with specific needs)

In closed environments (hospital, university, and planned communities)

Amongst the questions raised regarding emerging mobility solutions, there is high interest in First and Last Kilometer solutions for low-density areas for the development of AV systems. First and Last Kilometer services are among the priorities to improve transit systems with expected action by 72% in Sweden, 68% in the US, and 65% in Canada, Australia/New Zealand.

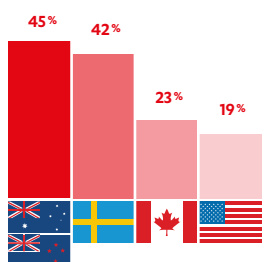
Many see partnering with a private sector transit operator as a likely option, including 76% of transit leaders in the US, 70% in Sweden, 61% in Australia and 55% in Canada.

As for Autonomous Systems, all countries are interested in deploying and testing AVs in the next 3 years with an average of 43%, with the U.S. at 52%.

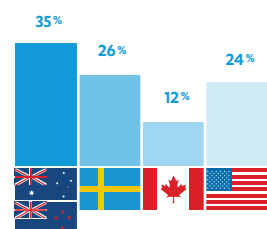
There's a possibility of deploying AVs in a shuttle service within airport parking areas – but not on public airport roads. — a U.S. transit decision maker

Transit authorities see AVs as strong contenders for utilizing in First and Last Kilometer solutions. The top ways transit leaders see using AVs include:

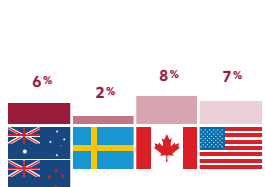
- First and Last Kilometer solutions (47%)
- Closed environments like hospitals, universities and planned communities (42%)
- Bus replacement at off peak hours (30%)
- Downtown pedestrian areas (22%)



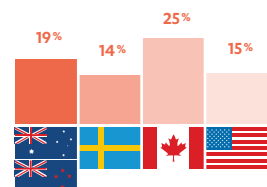
As a bus replacement for off-peak hours



In downtown pedestrian areas



Other



None

FOCUS – CANADA

As a pioneer of autonomous systems, Transdev Canada is showcasing autonomous vehicles in various locations across Quebec and Ontario to raise people's awareness, expand their acceptance and increase their knowledge of the opportunities provided by this new technology.

Transdev is currently operating autonomous shuttles at Montreal's Olympic Park along a four-stop line connecting two subway stations and providing a Last Kilometer service to Desjardins' employees and visitors alike.

We strongly believe that shared

autonomous transport is set to radically change the way we travel and live. These pilot programs provide public transit agencies a glimpse of how autonomous systems can seamlessly integrate with existing networks and provide valuable Last Kilometer services in various situations.



Partnering for the Mobility of Tomorrow

The pace of change is accelerating. Resources are constrained. And transit agencies face growing demands for better passenger experience, seamless integrated journeys, and new mobility options.

Most Canadian transit agencies express clear expectations and value the benefits of delegating transit services to transit operators. Canadian transit agencies look to private transit operators for their expertise in various fields.

- 57% of them would outsource partly or fully.
- 65% are interested in receiving support to manage passengers' satisfaction and complaints with their tools and processes. 62% look for support in growing ridership through effective marketing programs.
- In today's environment of reduced funding, another reason transit agencies outsource service is because they can hold private transit operators accountable for performance (62%).
- Last but not least, 50% of transit agencies credit private operators for state of the art and quick-to-market innovation.

As operator and global integrator of mobility, **Transdev has a vision for the future summarized in PACE as Personalized, Autonomous, Connected, Electric and Eco-Friendly.** This vision perfectly mirrors what emerged from the Canadian survey of the Transdev Multi-Country Barometer.



Personalized – 76% of the Canadian transit agencies recognize that data science can help increase customer knowledge and improve customized services. And 65% of transit agencies are likely to take action in enhancing services in low density areas with First and Last Kilometer solutions. Transdev is committed to collecting and analyzing data for insightful decisions about scheduling, routing and service design, thus providing the best suitable solution to help answer individual needs.



Autonomous – 43% of Canadian transit agencies look to autonomous vehicles as viable First and Last Kilometer solutions. Transdev knows that autonomous mobility is an integral part of transportation systems. Our partnership with manufacturers – like Renault-Nissan-Mitsubishi Alliance and Lohr – will help us deliver the best options for local authorities. One such example is the Rouen Normandy Autonomous Lab in France, a first in Europe.



Connected – 75% of Canadian transit agencies are interested in taking steps to create digital platforms with all-in-one functionality. Transdev is committed to helping anticipate the mobility needs of passengers with helpful, accurate and predictive solutions. We aim to connect travelers to the best information at every step of the journey.



Electric and Eco-Friendly – Transit authorities in Canada are open for private transit providers' expertise to advise them on options to limit greenhouse gas emissions (51%). At Transdev, we are at the forefront of the energy transition. Our goal is to help limit the environmental impact of our current fleet by reducing non-renewable fuel consumption, polluting emissions and noise pollution. In addition, we are Europe's largest electric bus operator, with more than 500 electric buses and mini-buses across 27 sites in 7 countries. We are committed to helping transit agencies benefit from our expertise in electric fleet management with vehicle performance, battery size, charging infrastructure, and efficient driving skills.

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