



# MOBILITY TRENDS REPORT: A COMPASS FOR 2030

# What does the near future have in store?

**P**ublic transport around the world is undergoing unprecedented transformations, requiring a forward-thinking approach to serve passengers and stakeholders effectively. To stay ahead of these shifts, it's essential to understand the trends shaping the future of mobility.

At RATP Dev, we're leveraging these insights to drive new projects and innovations. This report shares our findings and perspectives with the broader industry.

## Powerful megatrends are rapidly reshaping mobility

In collaboration with foresight experts Onepoint, we've adopted a global approach to analyze the economic, societal, geopolitical, and technological forces that will shape mobility by 2030. Our method combined over 50 interviews with international experts and internal contributors from 10 countries, alongside in-depth analysis of existing studies and foresight reports.

From this research, we identified eight key megatrends—each providing essential guidance for public authorities and transport professionals as they navigate the future.

## Understanding these forces unlocks action today

The decision to focus on 2030 reflects the urgency of the moment. This is not a distant horizon, but a near-term future that demands immediate and collective action. The recommendations in this report are designed to be practical, actionable and directly applicable to today's public transport operators and authorities, helping them prepare for the rapidly evolving landscape.

With the rapid pace of technological, demographic and environmental change, there is no time to wait. By acting now, we can build accessibility and adaptability, ensuring public transport systems remain sustainable, efficient, and ready for the future.

## This demands a collective effort from transport leaders

This is a call to action for decision-makers and the wider industry to come together and address the complexities ahead.

This report serves as a practical guide, offering mobility leaders the insights they need to navigate these challenges collectively. By 2030, we aim to have public transport systems that are not just prepared for the future but are actively shaping it with foresight and agility.

RATP Dev



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Mobility Trends Report:  
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# 8 megatrends will shape public transportation

Our analysis uncovered many key drivers of change that will shape strategic decisions across the public transport industry. These 44 factors were mapped across eight fundamental megatrends that will shape our social, economic, legal, political and technological landscapes by 2030.

## TREND 01 ▼

### CLIMATE CHANGE PRESSURES ARE MOUNTING

Preparing public transport for climate extremes through greener energy and infrastructure resilience.

## TREND 02 ▼

### PASSENGERS WANT TO FEEL SAFER

Enhancing safety with advanced technologies and ensuring public trust in transport systems.

## TREND 03 ▼

### EMPLOYEES EXPECT MORE

Leveraging automation to improve productivity and flexibility while preparing the workforce for new roles.

## TREND 04 ▼

### DEMOGRAPHICS ARE IN FLUX

Tailoring mobility services to serve the growing elderly population while bridging generational divides.

## TREND 05 ▼

### CONSUMERS PUT A PREMIUM ON EXPERIENCE

Integrating immersive technologies for a smoother passenger experience.

## TREND 06 ▼

### DATA & AI-BASED TECHNOLOGIES ARE TRANSFORMING THE ECONOMY

Unlocking the value of data and AI to optimize operations and create smarter mobility solutions.

## TREND 07 ▼

### LOCAL AUTHORITIES NEED TO DO MORE WITH LESS

Exploring innovative and sustainable business models to fund future mobility systems.

## TREND 08 ▼

### INCREASING TRAFFIC FLOWS PUT CITIES UNDER PRESSURE

Developing intermodality and urban logistics to support more sustainable transportation and limit traffic congestion.



TREND 02 ▼

### Passengers want to feel safer

Users of public transport need reassurance.

Passengers are increasingly sensitive to negative interactions within the transport system, and this has an impact on the quality of their experience and their loyalty. Concerns ranging from petty crime to serious cyber-attacks and disease outbreaks deter certain groups from using public transport.

To address these fears, innovative initiatives including advanced security technologies are being developed and rolled out.

“Technological solutions alone won’t solve the problem. Human presence, physical device (lighting, mirrors, alarm buttons, etc.) and technology are complementary levers that reassure and create the feeling of safety.”

CYRIL AUBIN, VP NORTH AMERICA & UK, RATP DEV

46%

of people do not feel secure on public transport

CSA survey (2023)

17%

Percentage of people who no longer use public transport because they do not feel safe

RATP Dev, International Public Transport Survey (11 countries, 8,000 respondents, 2023)



TREND 01 ▼

### Climate change pressures are mounting

Transport operators must prepare for upcoming climate challenges.

Climate change is already triggering extreme weather events, from heatwaves to floods, impacting transport infrastructure and passenger experience.

Shifting to sustainable public transportation is no longer a choice—it’s a necessity to protect ecosystems, preserve biodiversity, and responsibly manage resources.

Sustainable mobility influences the transport landscape and pose new financial and technological challenges. The transportation sector must speed up its transition by diversifying its energy sources and develop efficient energy management systems.

FIRST STEP

In La Roche-sur-Yon, France, the introduction of hydrogen-powered buses and the opening of our hydrogen training centre are perfect examples of our commitment to exploring new energies to meet the challenges of climate change.

15%

Percentage of total global greenhouse gas emissions due to the transport sector

International Energy Agency, Tracking Transport (2020)

40%

Increase in investment in clean energy since 2020

International Energy Agency, World Energy Outlook 2023

CHALLENGES TO TACKLE BY 2030

- Invest in renewable energy sources such as hydrogen and electrification to adapt to future mobility needs.
- Strengthen the protection of infrastructure and passengers against the growing risks of extreme weather events.
- Improve monitoring of sustainability metrics and energy consumption to track progress on CSR goals.



TREND 04 ▼

### Demographics are in flux

Transport systems must adapt to the evolving needs of societies.

We are living longer and growing in number. By 2050, it’s estimated that 22% of the population will be over 60. This demographic shift calls for adaptations in services and infrastructure to cater to both the needs of older travelers and the expectations of younger generations who share the same spaces.

Economically, inflation is impacting the global economy and straining passengers’ budgets. While some see this as an opportunity to embrace more frugal mobility options offered by public transportation, car-dependent travelers are feeling the squeeze, further deepening social inequalities.

“While many senior citizens are now proficient with digital services, it is crucial to enhance infrastructure and services to deliver truly inclusive mobility. Tailoring solutions to diverse needs will ensure accessibility for a broader range of individuals.”

GREGORY MALET, CSR DIRECTOR, RATP DEV

22%

Percentage of the world’s population which will be over 60 by 2050

World Health Organization (2022)

14%

Percentage of people aged 60 and over who live with a mental disorder

World Health Organization (2022)



CHALLENGES TO TACKLE BY 2030

- Adapt services and infrastructure to meet the needs of aging populations.
- Offer solutions supporting intergenerational cohabitation.
- Ensure equal access to mobility for all by a fair pricing proposal.
- Improve mobility in car-dependent areas to reduce socio-economic inequalities.



TREND 05 ▼

### Consumers put a premium on experience

Transport operators must embrace interconnected services and immersive technologies.

Digital technologies are revolutionizing the consumer experience, driving higher expectations for immediacy and functionality across all sectors. Mega-apps and platforms now deliver a complete ecosystem of services through a single-entry point. Beyond comfort and convenience, passengers are looking for personalized and emotional experiences. Immersive and entertaining solutions contribute to add fun and uniqueness to the journey.

FIRST STEP

The ideal experience should be a hybrid one, both digital and physical. In Brest, France, RATP Dev tested an innovative passenger information service featuring a virtual avatar. This digital assistant uses AI to provide real-time updates on routes, fares, and incidents.

8.4 billion

Number of digital voice assistants in use worldwide (2019-2024)

Statista

81%

Percentage of respondents who predict that in 2030 they will prefer to use a single app to order and pay for all mobility-related services

Bearing Point, Destination 2030 (2022)

CHALLENGES TO TACKLE BY 2030

- Integrate public transport into service ecosystems and mega-apps leveraging integrated platforms.
- Privilege human interaction where it makes a difference and use digital tools for simple requests.
- Streamline interactions to simplify journeys.
- Bring a sense of emotion back to the passenger experience.

TREND 06 ▼

### Data & AI-based technologies are transforming the economy

Transport operators need to harness data effectively to optimize operations and enable smart mobility solutions.

Today, sensors and onboard technologies enable cities, infrastructure, operators, and passengers to generate real-time data. This data is invaluable for local authorities and companies, optimizing operations, improving city management, and providing passengers with personalized journeys.

Emerging technologies like generative AI, Web 3, and quantum computing are set for rapid adoption, reshaping usage patterns and unlocking new opportunities.

“Technological advances are accelerating and are set to play a key role in optimizing our operations and the passenger journey. The challenge lies in identifying the right use case with high impacts.”

STEPHANE CHARBONNEAU, DIGITAL & DATA DIRECTOR, RATP DEV

175 zettabytes

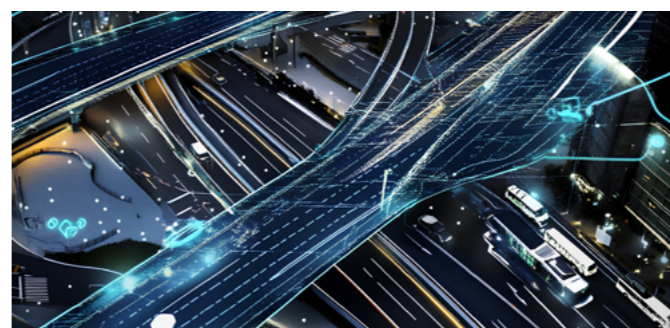
Total volume of data in the global datasphere predicted for 2025, up from 33 zettabytes in 2018

IDC, The Digitization of the World: From Edge to Core (2018)

60%

Percentage of executives who say they are investing in the use of new AI and IoT modes to create seamless services, offer safe travel and reduce costs for customers

KPMG, Future of Public Transport (2022)



CHALLENGES TO TACKLE BY 2030

- Reinforce systematically cybersecurity and data protection protocols.
- Make data actionable and valuable to improve operations and services for passengers.
- Encourage collaboration between sectors to share data more widely.



TREND 07 ▼

### Local authorities need to do more with less

Local and public transport authorities must find new business models and overcome challenges to finance tomorrow’s mobility solutions.

Public entities worldwide are under increasing pressure to secure sustainable funding for mobility solutions. In response, many are rethinking their business models, exploring options like privatization and public-private partnerships to stay resilient.

Cities operate as ecosystems, where collaboration between residents, local authorities, and organizations drives the delivery of high-value services. These partnerships are key to integrating transport more seamlessly into urban areas and meeting the diverse needs of communities.

FIRST STEP

Initiatives such as our subsidiary Hong Kong Tramways’ Free Ride Day, in which companies sponsor a day of free tram travel, show how imaginative partnerships can help deliver for communities.

€13.6 bn

aggregate value of 38 public-private partnership transactions that reached financial close in Europe in 2023

European Investment Bank

\$50 trillion

Investment in transport infrastructure needed worldwide by 2040

European Investment Bank

CHALLENGES TO TACKLE BY 2030

- Streamline operations and increase revenue streams to optimize costs.
- Explore new business models to diversify funding sources.
- Strengthen partnerships between city stakeholders and mobility operators to improve collaboration.

TREND 08 ▼

### Increasing traffic flows put cities under pressure

Cities need to rethink the way they organize traffic flows.

With the proliferation of mobility services, travelers have multiple options to make the same journey. To better orchestrate mobility and encourage the use of greener modes, it is essential to offer seamless multimodal journeys integrating all mobility services.

As e-commerce grows exponentially, last-mile delivery is a major challenge for urban logistics. Future strategies will involve the integration of different flows (people, goods) and modes (road, rail, waterborne, etc.) to make more efficient use of urban space.

“So-called ‘augmented’ stations will become multi-service hubs that ensure a positive passenger experience and promote intermodality.”

FRANCINE VELTHUIZEN, MARKETING & INNOVATION DIRECTOR, RATP DEV

78%

Increase in demand for last-mile delivery worldwide by 2030

World Economic Forum, Future of the Last Mile Ecosystem (2020)

\$1 trillion

Value of shared mobility global market by 2030

McKinsey, The Future of Mobility (2023)



CHALLENGES TO TACKLE BY 2030

- Optimize efficiency through a coordinated, global approach to flow management.
- Increase the attractiveness of public transport by ensuring a seamless multimodal journey from start to finish.
- Revitalise mobility hubs to transform them into dynamic public spaces.

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of mobility** together!

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