Deloitte. Insights

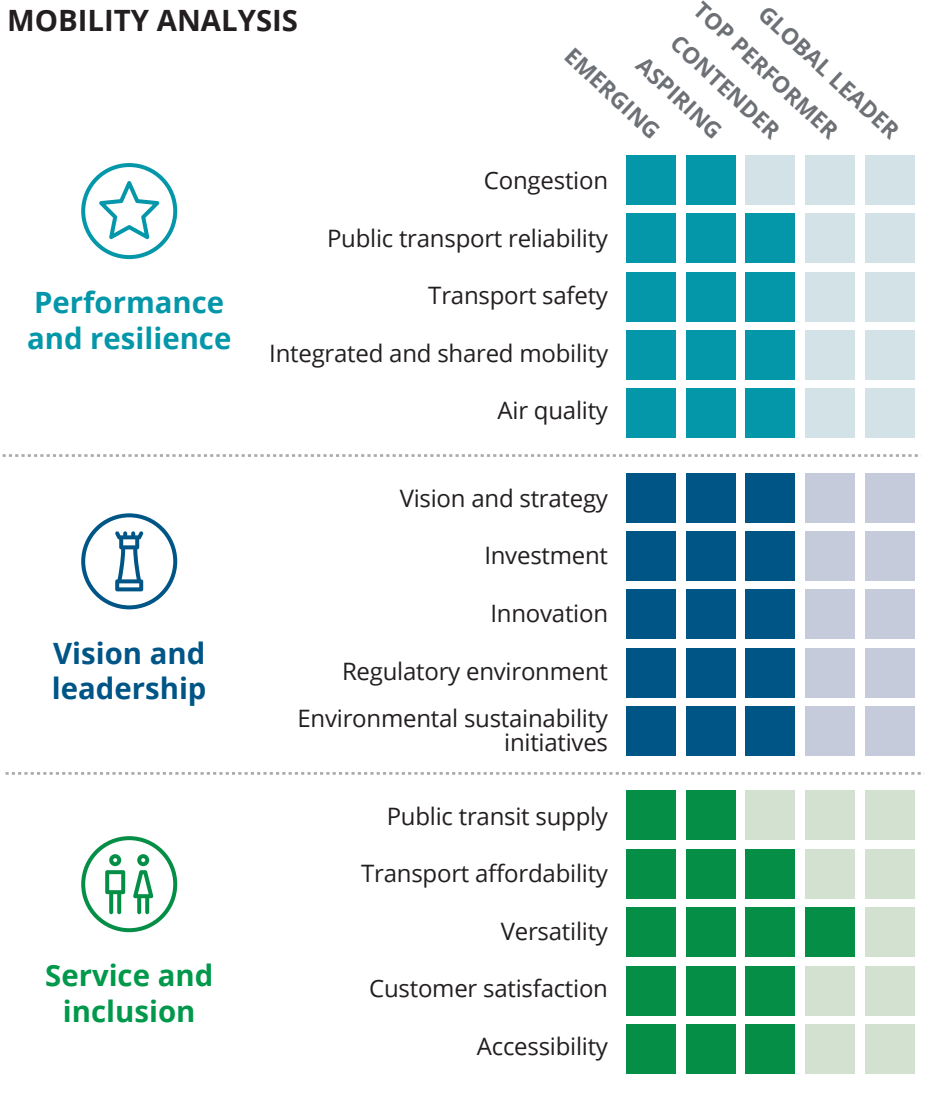## Deloitte City Mobility Index

📍 Brisbane

Analysis area: 1,342 km² | **Population:** 1,184,215 (2016) | **Population density:** 882/km²
Definition of analysis area: City of Brisbane: Local Government Area

Analysis area

MOBILITY ANALYSIS

⭐ Performance and resilience

	EMERGING	ASPIRING	TOP PERFORMER CONTENDER	GLOBAL LEADER	
Congestion	■	■	□	□	□
Public transport reliability	■	■	■	□	□
Transport safety	■	■	■	□	□
Integrated and shared mobility	■	■	■	□	□
Air quality	■	■	■	□	□

♜ Vision and leadership

	EMERGING	ASPIRING	TOP PERFORMER CONTENDER	GLOBAL LEADER	
Vision and strategy	■	■	■	□	□
Investment	■	■	■	□	□
Innovation	■	■	■	□	□
Regulatory environment	■	■	■	□	□
Environmental sustainability initiatives	■	■	■	□	□

👫 Service and inclusion

	EMERGING	ASPIRING	TOP PERFORMER CONTENDER	GLOBAL LEADER	
Public transit supply	■	■	□	□	□
Transport affordability	■	■	■	□	□
Versatility	■	■	■	■	□
Customer satisfaction	■	■	■	□	□
Accessibility	■	■	■	□	□

KEY MOBILITY STATISTICS

Public transport options*
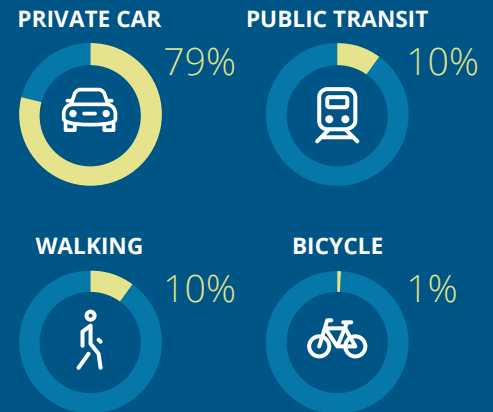Bus, commuter train, ferry, tram

Monthly public transport pass
US$80

GDP
US$120 billion (2015)

Principal transport authorities
Department of Transport and Main Roads, Brisbane City Council

Regulated and monitored by principal transport authorities.

JOURNEY MODAL SPLIT

PRIVATE CAR 79%
PUBLIC TRANSIT 10%
WALKING 10%
BICYCLE 1%

FUTURE OF MOBILITY CAPABILITY

Brisbane

FoM global leader

Significant work to do	Passive environment, a number of barriers	Proactive environment, some barriers	Proactive environment, few barriers

STRENGTHS

- Improved road safety as a result of ongoing initiatives that include road resurfacing, a speed-warning system, and a data-based emergency response system
- Committed investments in infrastructure projects, such as the Cross River Rail project and Brisbane Metro
- Use of data analytics to plan and monitor bicycle use and related infrastructure

CHALLENGES

- Existing public transport supply inadequate to serve growing population and urban sprawl
- Persistent congestion on major motorways and arterial roads coming into the central business district (CBD)
- Replacing legacy transport systems with new technology; integrating and sharing databases between the Department of Transport and Main Roads and Brisbane City Council

Key focus areas to improve city mobility and realize the Future of Mobility:

Deploying solutions such as fare incentives to shift rush hour in commuter trains to other times

Increasing collaboration to build and support electric vehicle (EV) infrastructure

Increasing the use of data analytics to improve network performance outcomes

MOBILITY ANALYSIS FURTHER DETAILS:

⭐ Performance and resilience

With car trips occupying 79 percent of the modal share, Brisbane faces congestion issues, compounded by an underperforming public transport network.

- Led by the National Transport Commission, Brisbane plans to invest more than US$75 million to improve road infrastructure and traffic management.

- Brisbane has an extensive and complex bus network, but overall rider numbers are declining due to the perceived difficulty of changing between services and declining reliability, which was below 70 percent in 2017.

- Brisbane has a bikesharing scheme, with over 2,000 bikes and 150 stations. Go Card can be used across all modes of public transport. The payment system is scheduled to include e-payments and payment via near-field communication from 2019.

♖ Vision and leadership

Brisbane City Council's 2018 draft strategic plan includes the expansion of public transport and active transport infrastructure. It should also look at disruptive elements, such as shared mobility, self-driving vehicles, and EVs.

- To address the car-dominated modal split, local and state governments plan to add six new bikeway projects (more than US$75 million investment), and expand Brisbane Metro (US$678 million) and Cross River Rail (more than US$4 billion).

- Brisbane City Council has started to explore self-driving vehicle testing, but has not received any formal testing proposals. The region has multiple firms working on EV charging solutions, although it lacks adequate charging infrastructure. Neither autonomous vehicles nor EVs are currently part of Brisbane City Council's 25-year strategic plan.

🧍🧍 Service and inclusion

Brisbane's growing urban sprawl and influx of commuters to the CBD for jobs has put pressure on the region's transport network, which is evident in several high-profile breakdowns during 2017, and only average customer satisfaction scores.

- Public transport projects such as Cross River Rail will help increase supply.

- While there are multiple public transport options available in Brisbane, customer satisfaction scores have been below 75 percent owing to fluctuating frequency and frequent technical breakdowns.

- The city council is running a Bus Stop Accessibility Improvement Program, which aims to make 100 percent of buses accessible for the disabled by 2022. TransLink also seeks the same for commuter trains and light rail as part of its Disability Action Plan.

SUMMARY

Brisbane is facing challenges typical of many growing cities, including road congestion and an increasing number of public transport breakdowns. Future transport planning for the region focuses heavily on increasing public transport supply through new metro and rail lines, and revamping the road network through technology-enabled solutions. Brisbane City Council and the Queensland government are also increasing the number of bikeways and bikesharing schemes, with investments planned over the next two years. To fully embrace the Future of Mobility, authorities need to start discussing disruptive models such as shared mobility, carsharing, and self-driving vehicles, and new technologies such as EVs. Expanding the open-data policy and investing in EV infrastructure can help encourage new entrants.

CONTACTS

Simon Dixon
Global Transportation leader
Partner
Deloitte MCS Limited
Tel: +44 (0) 207 303 8707
Email: sidixon@deloitte.co.uk

Haris Irshad
Technical director, Economic Consulting
Deloitte LLP
Tel: +44 20 7007 3297
Mobile: +44 7879 487623
Email: hirshad@deloitte.co.uk

Dr. Kellie Nuttall
Partner, Consulting
Deloitte Pty Ltd
Mobile: +61 488 54 54 64
Email: knuttall@deloitte.com.au