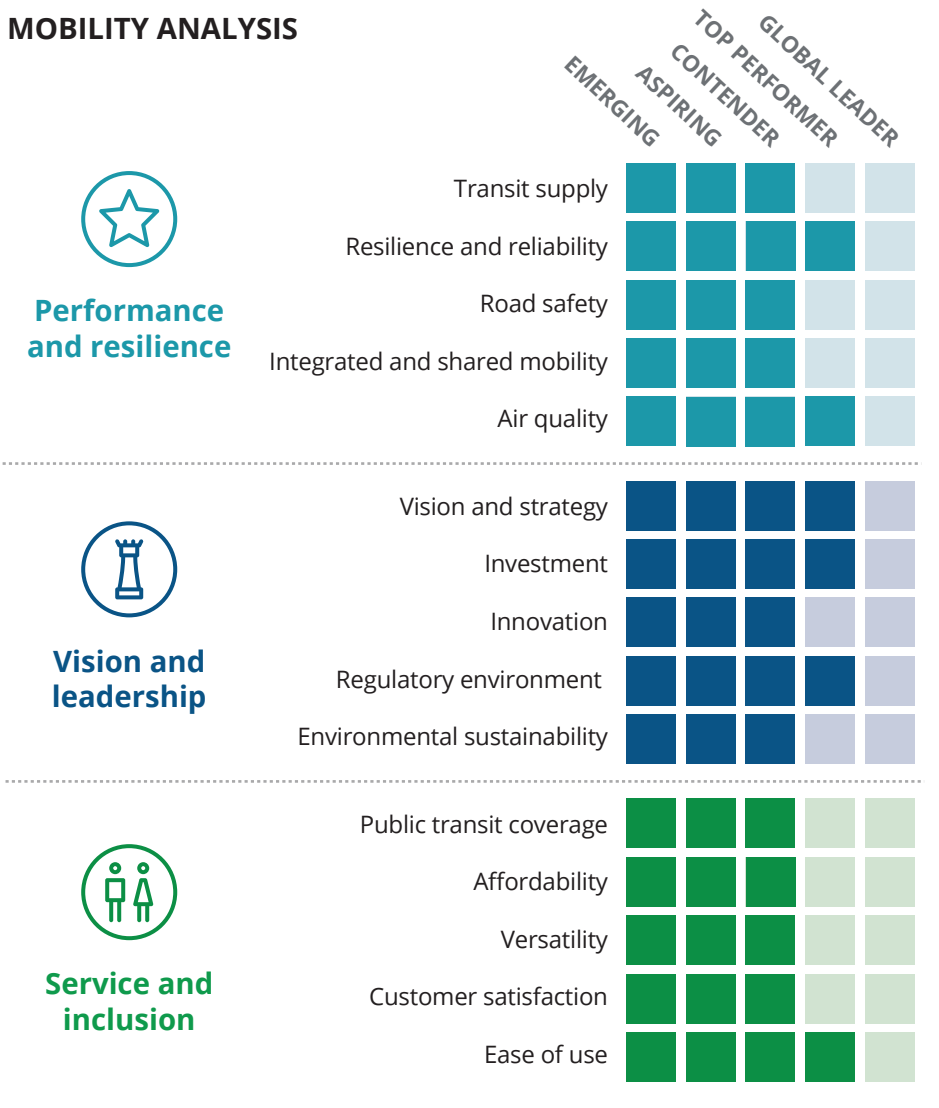
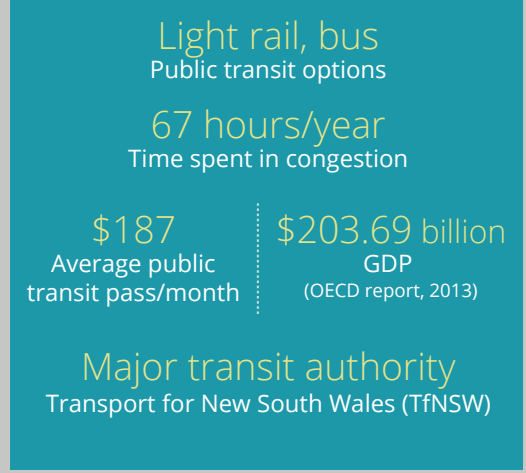


Analysis area

MOBILITY ANALYSIS

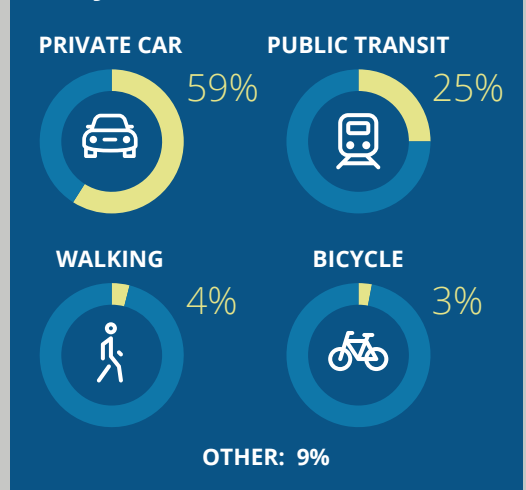


KEY MOBILITY STATISTICS



Note: All dollar amounts are in USD.

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY ANALYSIS

Sydney



STRENGTHS

- Trials of autonomous buses and cars and supportive legislative environment
- TfNSW runs a number of innovation competitions and showcases, and hosts an open data portal
- Highly reliable public transport system

CHALLENGES

- Lack of incentives for EV adoption
- Lack of transport infrastructure density due to large urban sprawl makes it hard to create seamless journeys
- Integrated ticketing options are not available for suburban areas

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



MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

Sydney has a highly reliable public transport system. The modal split is dominated by private car travel, which leads to a number of challenges. However, this is changing.

- Highly reliable public transit: 96 percent of light rail arrive on time.
- Changing travel patterns: Bus and rail use have increased by 36 percent and 24 percent, respectively, since 2009. Comparatively, total vehicle miles driven grew by a mere 6 percent.
- Investment into public transit network: With the planned expansion of the light rail service and the opening of the Sydney Metro, further growth in transit ridership could alleviate pollution and congestion in the city.

 **Vision and leadership**

With strong commitment to innovation, TfNSW's vision is to provide more customer-centric transportation infrastructure.

- TfNSW is planning to connect real-time digital information, navigation, payment, and engagement platforms to improve infrastructure and customer satisfaction.
- A strong commitment to innovation: TfNSW is a major partner of the Australian Driverless Vehicle Initiative (ADVI), setting Sydney up to play a prominent role.
- High potential for carsharing: Given Sydney's dispersed layout and reliance on car travel, carsharing initiatives look especially promising.

 **Service and inclusion**

Sydney's rail network ranks as one of the most expensive, but the system as a whole is highly secure and customer-focused.

- Strong security and ease of use: Extensive provisions made to support passengers with disabilities and to promote safety throughout the network.
- High price differential across modes: Sydney's rail network ranks as one of the most expensive in our index, while its bus network is among the least expensive.
- Lack of truly integrated ticketing system: Smart card used for public transit does not cover regional areas around Sydney.

SUMMARY

The dominance of private vehicles creates a number of major challenges for Sydney in terms of congestion and pollution despite scoring well across numerous socioeconomic and transport metrics. Coupled with Sydney's geography and public transit coverage, this may in the future become a major hindrance to economic growth.

The city recognizes this and has ambitions to improve its transport landscape in the near future with major initiatives such as the light rail network expansion and the introduction of a rapid transit subway system. In addition to establishing supportive conditions for new mobility solutions, this will place Sydney in good stead for the future.

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About the Deloitte City Mobility Index

The Deloitte City Mobility Index reviews major cities on key aspects of mobility and the resulting relationship to economic performance. Drawing on publicly available data, client conversations, and bespoke Deloitte analyses, we assess each city's ability to transport its citizens both now and in the future and therefore its potential to bring prosperity to the city.

As we receive feedback, we will update and expand the analysis, which may mean the results shown in this document may change.

For the full interactive index, visit the Deloitte City Mobility Index at deloitte.com/insights/mobility-index.

For Deloitte's insights on the Future of Mobility, visit deloitte.com/insights/future-of-mobility.

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