



Analysis area

Singapore

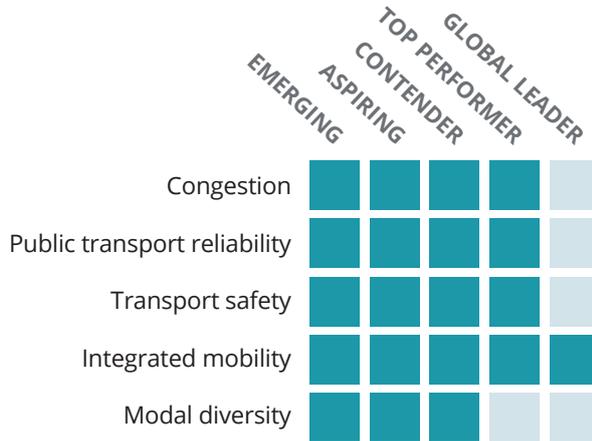
Analysis area: 725 km² | Population: 5,703,600 (2019) | Population density: 7,867/km²

Definition of analysis area: Republic of Singapore

MOBILITY ANALYSIS



Performance and resilience



Vision and leadership



Service and inclusion



KEY MOBILITY STATISTICS

Public transport options*

Commuter rail, light rail including metro and tram, bus, bike

Monthly public transport pass

US\$84

GDP per capita

US\$63,245 (S\$88,991) (2019)

Principal transport authorities

Ministry of Transport, through the Land Transport Authority (LTA) and the Public Transport Council (PTA)

JOURNEY MODAL SPLIT

PRIVATE CAR

33%



PUBLIC TRANSPORT

53%



WALKING

12%



BICYCLE

2%



OTHER: 0%

*Regulated, licensed, subsidised, and monitored by principal transport authorities.

FUTURE OF MOBILITY CAPABILITY

Singapore



STRENGTHS

- Collaborative approach with public-private partnerships for innovation and new technologies such as autonomous vehicle trials
- Well-developed public transport network that is inclusive and affordable
- Stable government with credible long-term vision and planning

CHALLENGES

- Slow to adopt private electric vehicle infrastructure due to focus on public transport
- Land constraints and rapidly growing population mean that mobility options will hit capacity limits without proactive initiatives
- Small market and reactive regulation results in quick entry and exit of micro-mobility companies

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



Streamline inter-agency processes to strengthen holistic mobility approaches



Make regulatory framework conducive to private investment in EV charging infrastructure



Promote uptake of clean energy vehicles via policy and innovation

MOBILITY ANALYSIS FURTHER DETAILS:

Performance and resilience

Use of public transport continues to increase thanks to good integration, convenience and efficiency. Furthermore, the city is quick to adopt emerging technologies that offer greater versatility to passengers.

- Successful implementation of traffic management schemes, such as vehicle quotas, electronic road pricing (ERP) and an intelligent transport system (ITS), has helped restrict congestion. There are plans to roll out a satellite-based ERP2 system from 2020.
- Singapore's contactless e-Pass application (CEPAS) technology offers a comprehensive payment system that covers public transport, motoring and some retail payments.
- The city offers versatile mobility options through shared modes that include bicycles, e-scooters and cars. The public transport network will undergo a big expansion over the next decade.

Vision and leadership

Singapore's transport strategy focuses on increasing active mobility through road redesign; enhancing public transport through better integration and technology-led innovation; and encouraging collaboration with the private sector.

- The LTA achieved a key milestone in 2018 by constructing 200 km of walkways. It has also built more than 440 km of cycle paths, in line with its ambitious plan for a 700 km cycling network by 2030.
- The city plans to expand the mass rapid transit (MRT) network to 360 km by 2030, up from 230 km in 2018, and increase bus speeds by introducing Transit Priority Corridors (TPCs).
- As part of its efforts to make Singapore a smart city, the first on-demand autonomous shuttle was publicly trialled in 2019. There are plans to deploy autonomous buses in Punggol, Tengah and Jurong Innovation District from 2022.

Service and inclusion

Increased investment, especially in the MRT network, has expanded capacity and improved reliability. However, the public transport system operates at a loss due to high subsidies and the shortage in farebox revenues.

- Public transport passenger numbers increased by 3.8 per cent in 2018, marking the fourteenth consecutive annual rise. While improved reliability increased customer satisfaction scores, the scores for waiting time and comfort were low.
- All metro stations are accessible for people with reduced mobility, as are over 95 per cent of pedestrian walkways, taxi stands, buses and bus shelters. The city plans to make all buses wheelchair-accessible by the end of 2020.
- For smartphone users, the public transport authority has developed a multi-modal journey planner, MyTransport.SG, and other applications that provide customers with real-time and customised travel information.

SUMMARY

Singapore is taking steps towards developing a sustainable transport system with a focus on infrastructure planning, land use optimisation, and integration of technology to alleviate traffic congestion. By enhancing the supporting infrastructure, such as sheltered walkways, the city is encouraging commuters to shift to active modes of mobility. These initiatives are in line with the LTA's 2040 vision of 20-minute towns and 45-minute cities, whereby 9 out of 10 peak-hour journeys can be completed in less than 45 minutes. Coupled with a growing technology startup community, the city is emerging as one of the most active innovation hubs globally for transport-related solutions.

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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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