



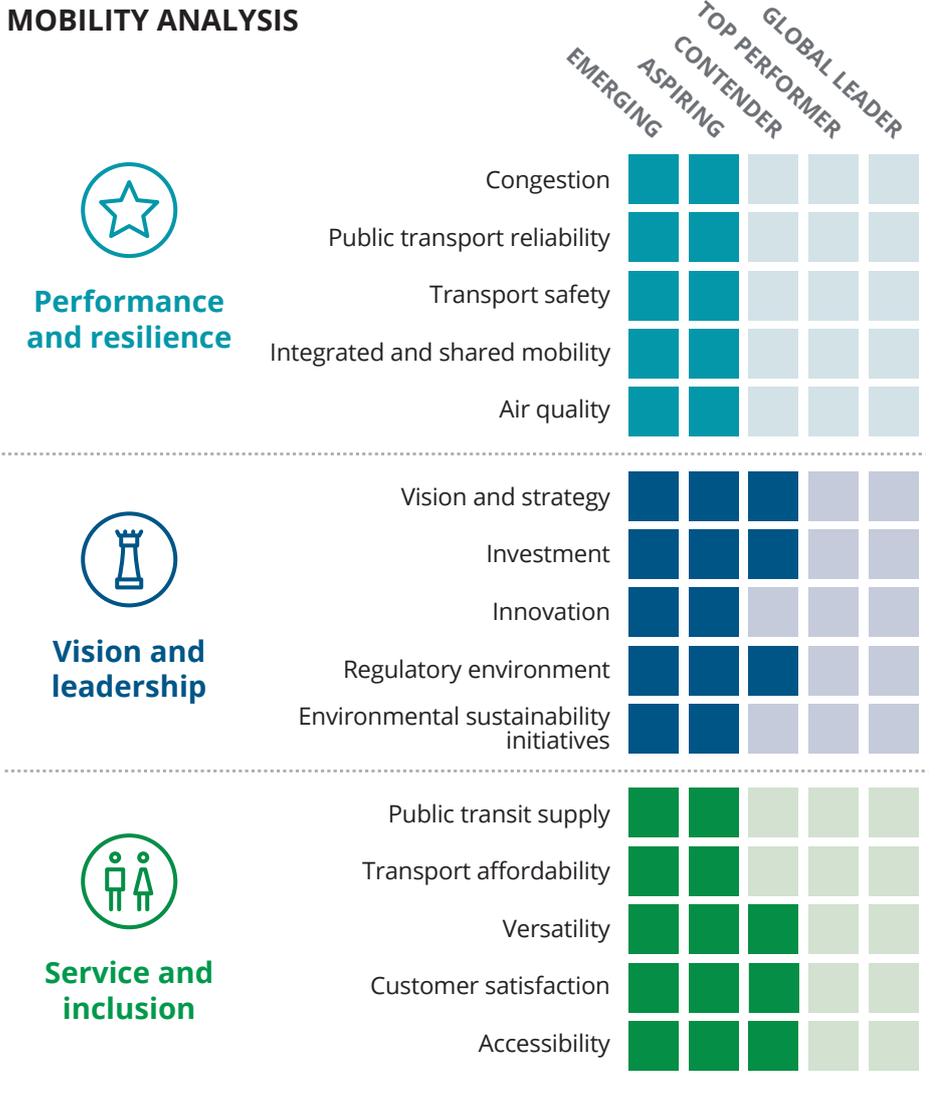
Analysis area

Cape Town

Analysis area: 2,445 km² | Population: 3,776,000 (2017) | Population density: 1544/km²

Definition of analysis area: City of Cape Town Metropolitan Municipality

MOBILITY ANALYSIS



KEY MOBILITY STATISTICS

Public transport options*
Bus, light rail, taxi

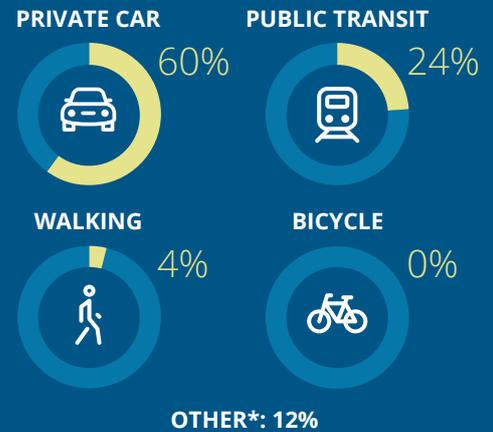
Monthly public transport pass
US\$33

GDP
US\$58 billion (2014)

Principal transport authorities
Department of Transport and Public Works, Transport and Urban Development Authority (TDA), City of Cape Town, Provincial Department of Transport for the Western Cape, Passenger Rail Agency of South Africa (PRASA)

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

JOURNEY MODAL SPLIT



*Includes minibuses and private two-wheelers.

FUTURE OF MOBILITY CAPABILITY

Cape Town



Significant work to do

Passive environment, a number of barriers

Proactive environment, some barriers

Proactive environment, few barriers

FoM global leader

STRENGTHS

- Working to provide 80 percent of city residents access to public transportation within 500 meters of their residence
- Incentivizing public transport usage via higher parking charges
- The city's Advanced Public Transport Management System (APTMS) helps track delays and improve customer satisfaction

CHALLENGES

- Fragmented and unreliable public transportation system forces commuters to drive, which leads to congestion
- Metrorail's ridership is 70 percent above total capacity and suffers from high crime rates and vandalism
- Low adoption of cycling due to road safety and personal security issues

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



MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

High use of private vehicles due to unreliable public transport is one of the biggest sources of air pollution in Cape Town. The city is working to transform its public transport system.

- Cape Town has multiple operators across different modes, which results in uncoordinated routes and a lack of integrated ticketing and payment systems. These factors, coupled with safety concerns, discourage commuters from using public transport.
- In 2015, the city began its Congestion Management Program to reduce traffic problems. The city plans to spend more than US\$57 million over five years on road infrastructure projects.
- To reduce air pollution and congestion, in 2017 Cape Town introduced flexi-time, which encouraged workplaces to allow staff to work from home or commute outside peak hours. The result? Traffic jams now start earlier.

 **Vision and leadership**

Cape Town has developed a 2032 city vision that encourages adoption of new technologies along with modernizing and expanding the public transportation network.

- Cape Town adopted its Integrated Public Transport Network plan in 2017 to develop a seamless public transport system. The city plans to add a new bus hub and new rail lines, increase the number of bus routes, and introduce a smart card.
- The city has allocated more than US\$106 million to modernize the Bus Rapid Transit (BRT) routes. These new routes will allow for five times the number of passengers currently using the BRT network. BRT services will also include minibus taxis.
- Cape Town is the first African city to use electric vehicles (EVs) in the public transport system, investing in a fleet of electric buses. The Transport and Urban Development Authority also aims to increase bicycle commuters from 1 percent to 8 percent by 2030.

 **Service and inclusion**

The city has adopted customer-centric technology in its minibus system. Policymakers are also allocating transport funds in line with trip patterns to improve affordability for low-income groups.

- Cape Town has affordable transport options such as the minibus taxi network. To make the wider transport network more affordable for low-income groups, in 2016 the city council announced its plans to reduce the cost of all modes of transport over the next five years.
- Adopting a new Advanced Public Transportation Management System in 40 percent of MyCiTi busses since 2017 has improved customer satisfaction. The system enables passengers to track delays and get updated information on departure times.
- The disabled are served by initiatives such as the Dial-a-Ride public transportation services and the launch of Go George buses equipped with ground-level boarding platforms.

SUMMARY

Cape Town is one of the most congested cities in South Africa, largely due to unreliable public transport and narrow roads. To address this problem, the 2032 City Vision plans to integrate different modes of public transportation to form a seamless system. The city will also invest in technologies to facilitate a convenient, secure, and cost-effective fare system that works across all modes. Another challenge is the low share of active modes; despite having 450 kilometers of cycle lanes across the city, very few people use bicycles to get around. The city should also promote carpooling, carsharing, and bikesharing to reduce congestion.

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

Marius Alberts
Partner, Western Cape regional lead
Deloitte & Touche Partnership
Tel: +27 082 450 7387
Email: maalberts@deloitte.co.za

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.

About this publication

This publication has been written in general terms and we recommend that you obtain professional advice before acting or refraining from action on any of the contents of this publication. Deloitte MCS Limited accepts no liability for any loss occasioned to any person acting or refraining from action as a result of any material in this publication.

About Deloitte

Deloitte MCS Limited is registered in England and Wales with registered number 03311052 and its registered office at Hill House, 1 Little New Street, London, EC4A 3TR, United Kingdom.

Deloitte MCS Limited is a subsidiary of Deloitte LLP, which is the United Kingdom affiliate of Deloitte NWE LLP, a member firm of Deloitte Touche

Tohmatu Limited, a UK private company limited by guarantee ("DTTL"). DTTL and each of its member firms are legally separate and independent entities. DTTL and Deloitte NWE LLP do not provide services to clients. Please see www.deloitte.com/about to learn more about our global network of member firms.

© 2018 Deloitte MCS Limited. All rights reserved