

# A generational shift in urban mobility

*Insights from the December 2022 Deloitte-ThoughtLab Global City Survey*

A report from the Deloitte Center for Government Insights



**Deloitte.**

<i>03 . . . Introduction</i>	<i>10 . . . Offering environmental-friendly and sustainable transportation options</i>
<i>04 . . . Key takeaways</i>	<i>12 . . . Expanding open spaces for walking and biking</i>
<i>05 . . . City challenges</i>	<i>13 . . . Enhancing support and infrastructure for EVs</i>
<i>07 . . . Citizen expectations on mobility and transportation</i>	<i>15 . . . Recommendations and next steps</i>
<i>08 . . . Implementing strategies reduces traffic congestion</i>	<i>16 . . . Survey methodology</i>



# Introduction

**T**he pandemic transformed mobility and transportation in cities globally. It highlighted challenges in the system, changed citizen expectations, travel preferences, and more. These new patterns have provided an opportunity for city and transportation leaders to rethink the future of urban transportation and mobility.

In December 2022, Deloitte collaborated with ThoughtLab to survey 200 city leaders and 2,000 citizens globally to better understand the ways in which cities are becoming future-ready. The survey suggests that city leaders

and citizens foresee considerable shifts in urban mobility and transportation. Surveyed city leaders are aiming to reshape urban mobility by aligning with citizen expectations around less congestion, open spaces for walking and biking, and more sustainable transportation options including better infrastructure for electric vehicles (EVs).

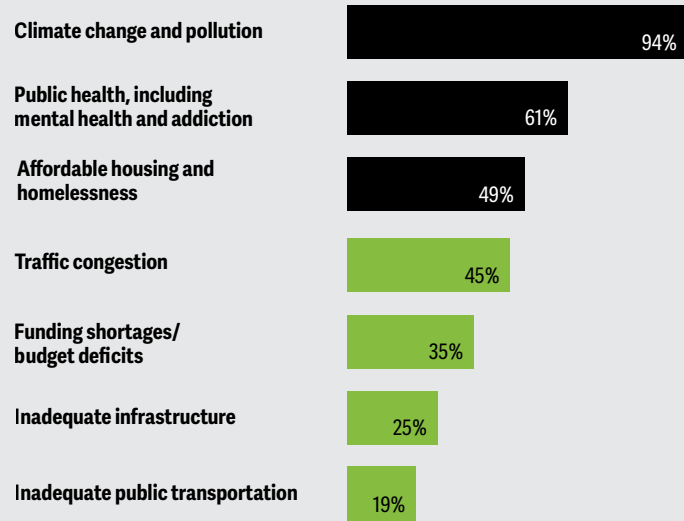


## Key takeaways

- 1.** City leaders feel traffic congestion and inadequate infrastructure and public transportation continue to stifle transportation in cities.
- 2.** Aligning with citizen expectations on transport and mobility can be vital for city leaders around the world to successfully reshape urban mobility for the future.
- 3.** Surveyed city leaders are addressing traffic congestion by implementing a range of measures such as congestion pricing and traffic management systems.
- 4.** Citizens want cities to offer more environment-friendly and sustainable transportation options.
- 5.** Expanding the availability of open spaces for walking and biking is crucial—an endeavor cities globally are increasingly prioritizing.
- 6.** Citizens surveyed want local governments to do more to move toward sustainable modes of transport like electric vehicles and build the required EV infrastructure.

**Traffic congestion and inadequate infrastructure and public transportation continue to stifle mobility in cities**

**Which of the following are the biggest challenges your city will face over the next five years?**



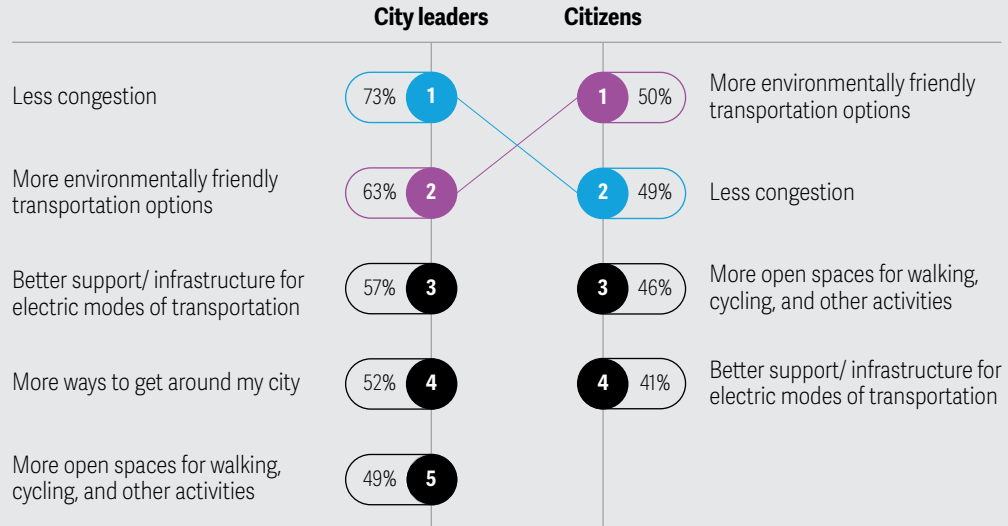
Source: Deloitte-ThoughtLab Global City Survey, December 2022.

- Most city leaders surveyed (94%) globally identified climate change and pollution as their biggest challenges, which could influence their transportation and mobility strategy.
- Funding shortages continue to hinder progress across city domains. However, it has a deeper impact on urban public transportation and infrastructure development that needs huge capital investments.

**Most city leaders surveyed continue to be aligned with citizen expectations on mobility and transportation in urban areas**

This shared understanding will be important in reshaping urban mobility for the future, with a focus on environmental and sustainable modes of transport including EVs, public transportation, cycling, and walking.

**Which of the following areas have the pandemic and other recent trends increased citizen expectations in travel and transportation?**



Source: Deloitte-ThoughtLab Global City Survey, December 2022.



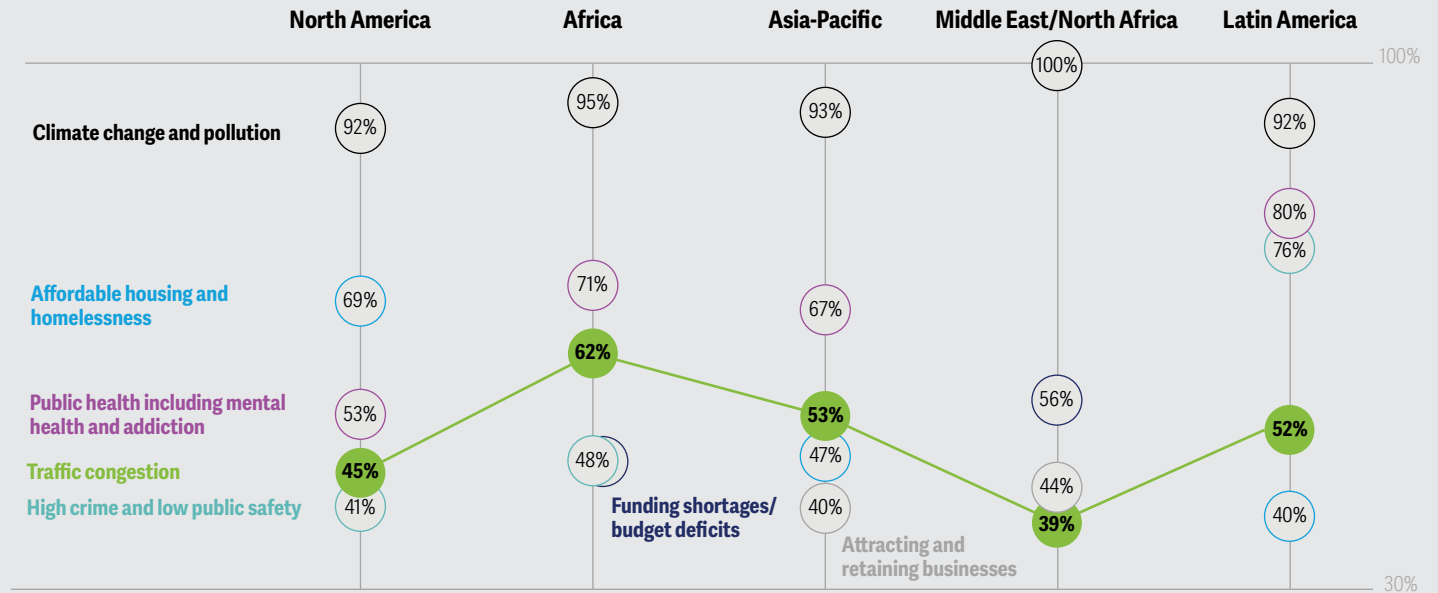
## **City leaders across the globe can rethink transportation and mobility by aligning with citizen expectations**

The article dives deeper into the four citizen expectations areas of reducing congestion, transitioning to sustainable transportation options, developing infrastructure for walking and biking, and supporting the shift to EVs.

- **Implement strategies to help reduce traffic congestion** to improve commuting efficiency, reduce travel time, and provide seamless transportation for individuals.
- **Offer more environment-friendly and sustainable transportation options** to help reduce carbon emissions and combat climate change.
- **Expand availability of open spaces for walking and biking**, which can enhance public health, promote physical activity, and thereby create a healthier community.
- **Enhance support and infrastructure for EV infrastructure** by transitioning to cleaner energy and ushering in a **generational shift in mobility**.

**Traffic congestion continues to be a challenge in most regions, especially in African, Asia-Pacific, Latin American cities**

### Which of the following are the biggest challenges your city will face over the next five years?



Source: Deloitte-ThoughtLab Global City Survey, December 2022.



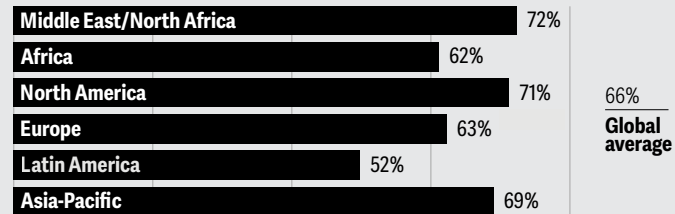
**City leaders surveyed are prioritizing congestion pricing in their business models and are also increasing their future spending and investments**

## How cities globally plan to improve mobility and transportation for the future?

*Cities prioritizing congestion pricing in their business models, by region*



*Cities investing in traffic and congestion management, by region*

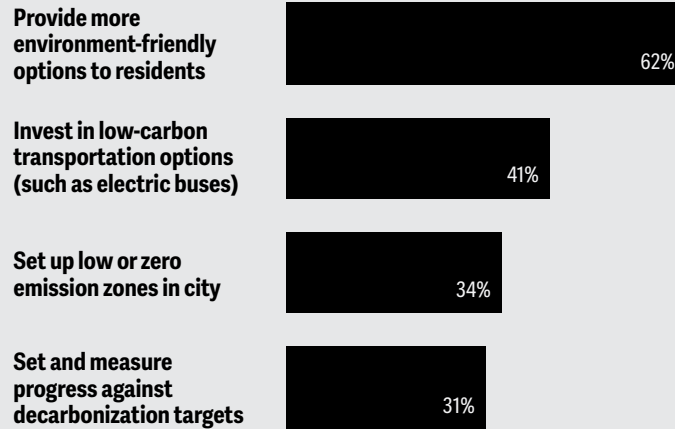


Source: Deloitte-ThoughtLab Global City Survey, December 2022.

- Congestion pricing, including [road usage charging](#), is seen as an effective tool for managing traffic congestion and encouraging the use of alternative modes of transportation.
- To reduce traffic volume and improve traffic flow, 68% of city leaders surveyed globally cited prioritizing congestion pricing/user-based charging/curb pricing/road-user charging in their business models in the next five years.
- Globally, 66% of surveyed city leaders say their cities are stepping up investment in traffic and congestion management on streets and roads with MENA leading the pack followed by Asia-Pacific.

**Adopting more sustainable modes of transport is a top priority for city leaders and citizens surveyed globally**

### **Which actions will your cities prioritize over the next five years to reduce the carbon footprint of its mobility and transportation system?**



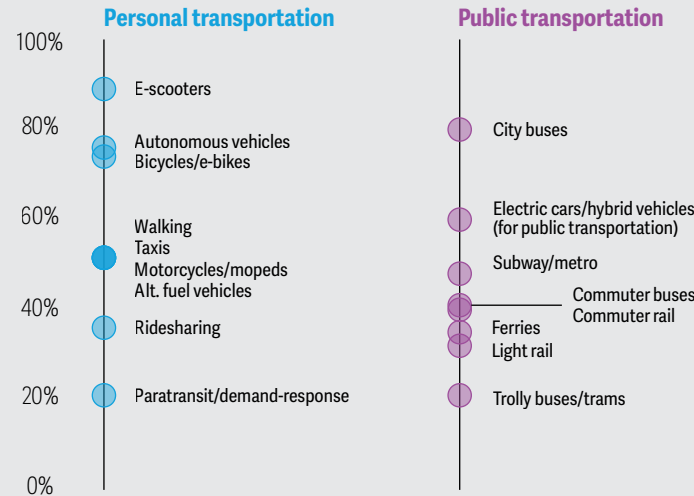
Source: Deloitte-ThoughtLab Global City Survey, December 2022.

- City leaders surveyed are prioritizing aligning transport plans with social and environmental goals.
- Cities are also prioritizing multifaceted approaches such as providing more environment-friendly mobility options and investing in low-carbon transportation options to reduce the carbon footprint in mobility and transportation systems over the next five years.

**City leaders surveyed are also shifting their focus toward using more sustainable public transit options**

**Over the next five years, which of the following modes of transportation will your city seek to increase in usage?**

*Percentage denotes “increased usage”*



- City leaders globally want to encourage more sustainable public transit options such as electric, hybrid, and alternative fuel vehicles.
- City leaders surveyed also want to see residents move toward using e-scooters, bicycles, or walking, especially for shorter, last-mile transportation needs.

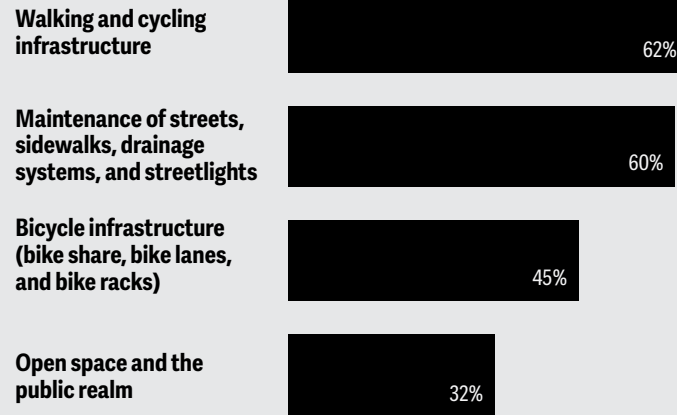
**CASE STUDY: BOOSTING PUBLIC TRANSIT IN AUSTIN**

Austin’s “Project Connect” is an ambitious US\$7 billion transit-expansion project aimed at moving the city away from cars by developing a more effective multimodal transportation system. The plan aims to develop four rapid-transit routes for buses, two new light rail lines, and new subway tunnels through downtown and South Austin areas.

Sources: Luz Moreno-Lozano, [“Austin’s Project Connect light rail plan unveiled,” Austin American Statesman, May 23, 2023](#); Project Connect, [“A new transit plan for Austin,”](#) accessed July 14, 2023.

**City leaders are increasingly prioritizing the expansion of open spaces and infrastructure for walking and biking**

### **As your city prepares for the future, in which areas will it materially increase spending and investments?**



Source: Deloitte-ThoughtLab Global City Survey, December 2022.

- By investing in and designing walking and cycling infrastructure (62%) and networks of bicycle infrastructure (45%), cities are encouraging more people to choose these modes of transport for their daily commute (especially last-mile connectivity) or recreational purposes.
- By moving away from cars as the primary mode of transportation and embracing [multimodal options](#), cities can unlock multiple benefits, like reduced congestion, better connected transportation networks, and more.
- As they plan future investments, cities should not only tackle present challenges but also develop “[infrastructure for good](#),” that is, projects that have positive outcomes for the economy, environment, and society as a whole.

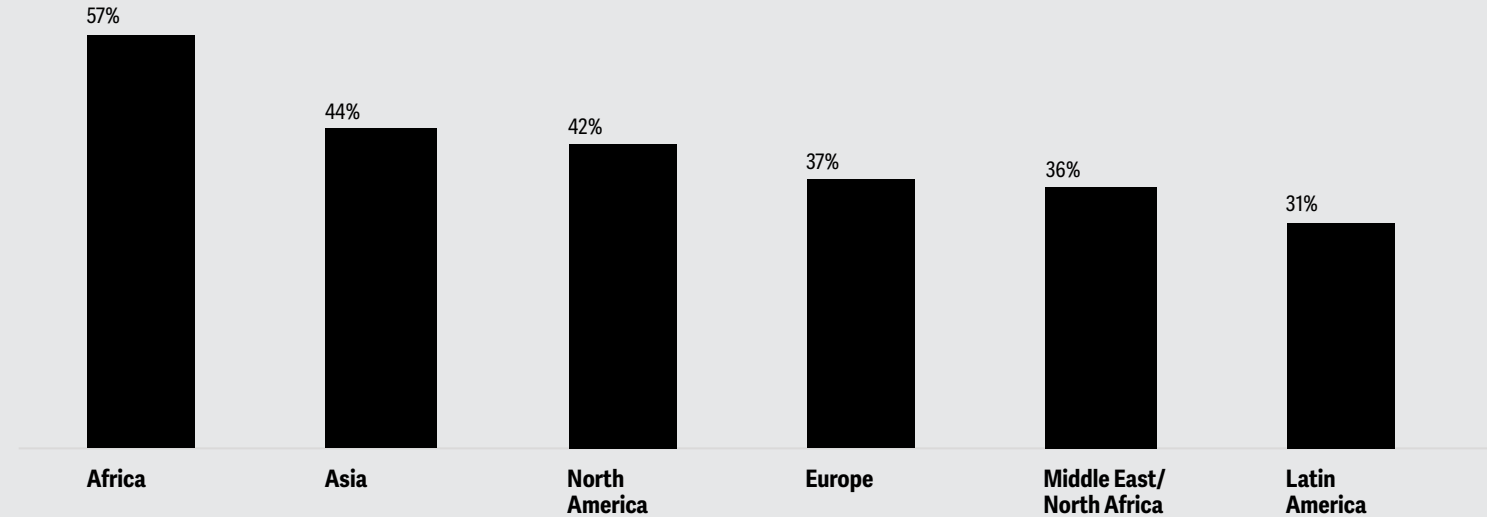
**Citizens surveyed want local governments to do more to help them move toward EV transportation by developing supporting EV infrastructure**

There is a [growing intent](#) in consumers globally to move from internal-combustion engines (ICEs) to more electrified vehicles.

The data suggests that surveyed citizens want their cities to support and build the required EV-charging infrastructure and broader EV-maintenance ecosystem.

**In which following areas has the pandemic and other recent trends raised your expectations?**

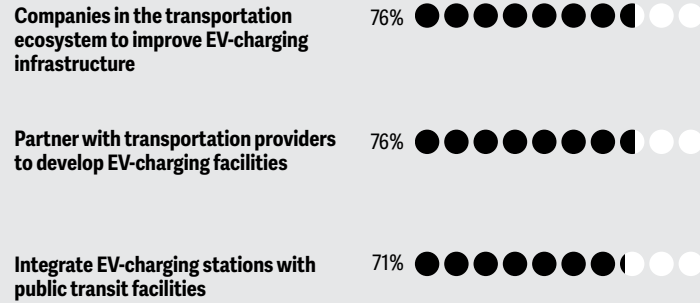
*Better support/infrastructure for electric modes of transportation*



Source: Deloitte-ThoughtLab Global City Survey, December 2022.

**City leaders are planning to expand the EV-charging network by partnering with the broader transportation ecosystem**

**Actions cities are prioritizing to accelerate the development of EV-charging infrastructure over the next five years**



Source: Deloitte-ThoughtLab Global City Survey, December 2022.

- [Charging infrastructure](#) could be the biggest short-term hurdle for EV expansion. Building a ubiquitous charging network that resembles today's gasoline and diesel infrastructure may be one of the toughest challenges to address.
- By expanding the availability of charging stations throughout cities, EV drivers can have the confidence and convenience to travel longer distances without the fear of running out of power.
- Cities surveyed are taking various steps to overcome this hurdle, such as collaborating with businesses, power utilities, and other stakeholders.



## Recommendations and next steps

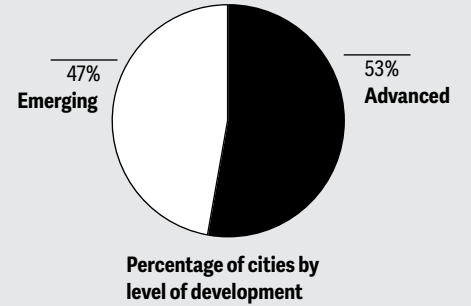
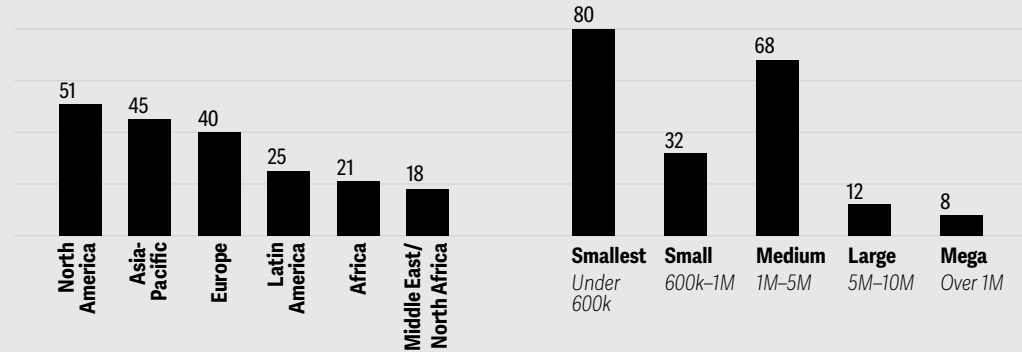
As city leaders strive to tackle both new and long-standing mobility and transportation challenges in an ever-changing world, they should be more intuitive—to sense and respond to citizen needs as they emerge—and more open to adopting innovative solutions leveraging the latest tools and technology available at their disposal.

- **Partner with different stakeholders to create a more connected transportation network.** As city leaders grapple to address traffic congestion, they should consider partnering with a broader ecosystem including the private sector, technology firms, educational institutions, and community organizations to ideate a variety of solutions to help achieve this collective objective.
- **Integrate a sustainable lens into transportation decisions.** As climate change threatens cities worldwide, city leaders should consider introducing policies and regulations to shift to sustainable transportation options, provide incentives for using environment-friendly modes and encourage clean energy technological innovations that lead the way toward a greener future.
- **Promote people-centric infrastructure.** City leaders should consider designing streets for people, not vehicles, that are attractive and safe for walking and expanding cycling and biking networks.
- **Scale the EV infrastructure equitably.** As city leaders move toward expanding the EV infrastructure, they should ensure that no one is left behind: low-income and disadvantaged communities should also be able to equitably reap the benefits of the growing EV network.



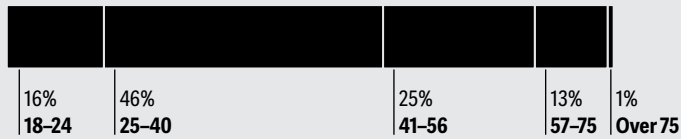
# Survey methodology

200 total cities surveyed in 67 countries

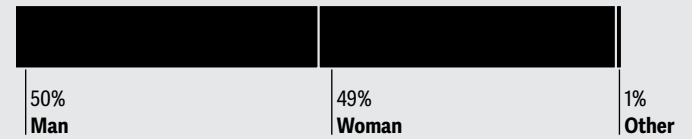


2,000 total citizens surveyed across 20 different regions

Citizens by age



Citizens by gender





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## About the authors

### **Mahesh Kelkar**

mkelkar@deloitte.com

Mahesh Kelkar is the Smart Cities research leader for the Deloitte Center for Government Insights. His research focuses on understanding the impact of technology, innovation, and policy on the future of cities. He closely tracks the federal and state government sectors and focuses on conducting in-depth research on the intersection of technology with government operations, policies, and decision-making.

### **Ricardo Martins**

ricardofmartins@deloitte.pt

Ricardo Martins joined Deloitte in 2021 as a member of our leadership team for Global Smart Cities & Urban Transformation and Future of Mobility teams. He is responsible for the development and growth of the smart city business and its technological alliances. With more than 20 years of experience directing full-scale projects and business development initiatives for global corporations, he worked in areas such as consulting, government, telecommunications, and information technology.

### **Glynis Rodrigues**

glynrodrigues@deloitte.com

Glynis Rodrigues is a senior research analyst with the Deloitte Center for Government Insights. Her research focuses on cross-sector government topics and issues related to state and local government.

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Through the Smart Cities & Urban Transformation practice, Deloitte has an ambition to improve citizens' quality of life, solve key urban challenges, and positively contribute toward the United Nation's Sustainable Development Goal 11: Make cities and human settlements inclusive, safe, resilient, and sustainable. The initiative offers up-to-the-minute thinking on how cities can use advanced digital technologies to address such key issues as mobility, data, and sustainability. Drawing on our global reach and cross-sector experience, Deloitte translates a holistic vision of smart cities into actionable, concrete solutions that can enable a brighter urban future. To learn more, visit [Deloitte.com](https://www.deloitte.com).

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### Industry leadership

#### **William D. Eggers**

Executive director | Deloitte Center for Government Insights  
+1 571 882 6585 | weggers@deloitte.com

William D. Eggers is the executive director of Deloitte's Center for Government Insights, where he is responsible for the firm's public sector thought leadership. His most recent book is *Delivering on Digital: The Innovators and Technologies that Are Transforming Government*.

## Contributors

**Editorial:** Rupesh Bhat, Arpan Kr. Saha, Emma Downey, Aparna Prusty, and Aditi Gupta

**Creative:** Sonya Vasilieff, Molly Piersol, and Harry Wedel

**Cover artwork:** Sonya Vasilieff



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