

Analysis area

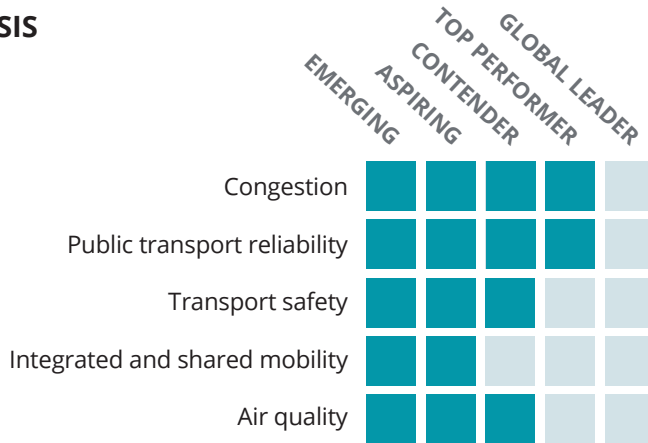
Analysis area: 1,322 km² | Population: 1,515,000 (2016) | Population density: 1,146/km²

Definition of analysis area: Columbus, OH urbanized area as designated by US Office of Management and Budget

MOBILITY ANALYSIS



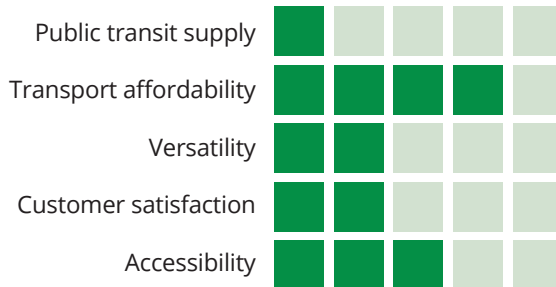
Performance and resilience



Vision and leadership



Service and inclusion



KEY MOBILITY STATISTICS

Public transport options*
Bus

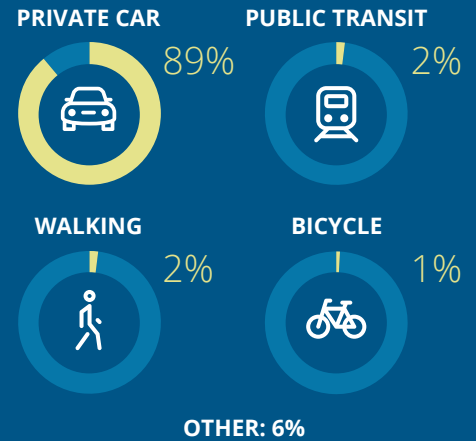
Monthly public transport pass
US\$59

GDP
US\$130.7 billion (2016)

Principal transport authorities
Central Ohio Transport Authority

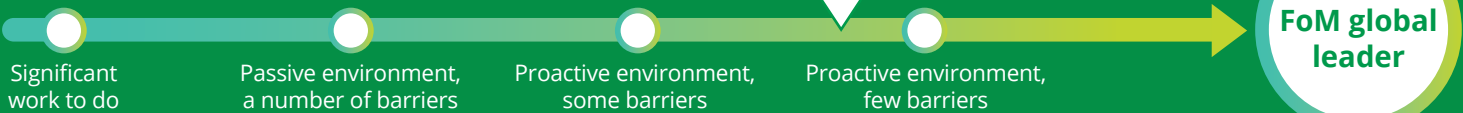
*Regulated, licensed, subsidized, and monitored by principal transport authorities.

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY CAPABILITY

Columbus



STRENGTHS

- Winner of US DOT-Smart City Challenge funding to develop smart transport network
- Strong private-public partnerships in place to address transportation needs, as well as strong interagency and interdepartmental coordination
- The Rickenbacker Inland Port is a global multimodal logistics hub

CHALLENGES

- Use of transport data and implementation of integrated payments is a priority for the city but has proven complex due to legacy infrastructure
- Distribution of public transit network is not equitable and does not include low income neighborhoods
- Lack of downtown parking availability during peak hours

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



MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

Columbus has an underdeveloped and minimal public transport network, leaving the city almost entirely reliant on private cars for travel.

- Public transit consists solely of a bus service (with a nonintegrated, outdated, cash-only payment system), a key contributing factor to the 89 percent modal share for car travel.
- Overall bus use has increased since 2006 but has stagnated since 2011 and requires network expansion and innovation to bring in more passengers.
- The bus network's low revenue-to-cost ratio due to low passenger numbers results in a dependence on external funding and an inability to grow and improve services.

 **Vision and leadership**

In 2016, Columbus won the US Department of Transportation's Smart City Challenge, which is providing the city with a great opportunity to make strides across all aspects of mobility in the near future.

- Columbus has gained over US\$500 million of funding from the federal government and private investors to deliver Smart City initiatives.
- Collaboration with Ohio's Transportation Research Center can allow Columbus to play a central role in the development of Future of Mobility technologies such as autonomous and connected vehicles.
- The city's poor ranking for sustainability is driven by the prominence of car travel and low adoption of electric vehicles, or EVs (0.27 percent of new cars in Ohio).

 **Service and inclusion**

Private transportation is the preferred option due to the limited reach of public transportation.

- Low customer satisfaction scores are mainly due to the limited public transport coverage and only one option of transport (bus).
- The city needs to update its transport infrastructure to support disabled commuters.
- Although the city has won the US DOT Smart City Challenge, it still needs to focus on developing other modes of transport that serve an expanded group of residents with an emphasis on underserved regions.

SUMMARY

Columbus is the largest US metropolitan area with no passenger or light rail service. The city's only public transit option is an underdeveloped bus system, which is why most citizens drive to get around. To date, congestion and pollution have been managed but, with a growing population, this will not always be the case. Columbus is already scoring poorly on quality-of-life indicators such as poverty rates, income inequality, and life expectancy, and these problems are likely to be exacerbated in the future if the city does not invest in more accessible and more active modes of transport. The award of the Smart City Challenge fund has the potential to transform Columbus's transport system, providing a real means to address these challenges.

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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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