



MOBILITY ANALYSIS

EMERGING ASPIRING TOP PERFORMER GLOBAL LEADER



Performance and resilience

Congestion	■	■	■	■	■
Public transport reliability	■	■	■	■	■
Transport safety	■	■	■	■	■
Integrated mobility	■	■	■	■	■
Modal diversity	■	■	■	■	■



Vision and leadership

Vision and strategy	■	■	■	■	■
Investment	■	■	■	■	■
Innovation	■	■	■	■	■
Regulatory environment	■	■	■	■	■
Environmental sustainability initiatives	■	■	■	■	■



Service and inclusion

Public transport density	■	■	■	■	■
Transport affordability	■	■	■	■	■
Air quality	■	■	■	■	■
Customer satisfaction	■	■	■	■	■
Accessibility	■	■	■	■	■

KEY MOBILITY STATISTICS

Public transport options*

Bus, light rail including tram and metro, monorail, taxi, water taxi, ferry

Monthly public transport pass

US\$68

GDP per capita

US\$32,162 (2019)

Principal transport authorities

Roads and Transport Authority of Dubai (RTA)

JOURNEY MODAL SPLIT

PRIVATE CAR



PUBLIC TRANSPORT



WALKING



BICYCLE



Other: 12%

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

FUTURE OF MOBILITY CAPABILITY

Dubai



STRENGTHS

- Continuing public transport investments for Expo 2020 will result in an expanded transport system with improved metro services and a much larger bus network
- Stated desire to introduce smart mobility options into the transport mix, such as autonomous vehicles and intelligent transport planning
- Relatively compact geographical area means that authorities can act quickly once they set an objective

CHALLENGES

- Private vehicles are still the main mode of transport for the majority of commuters, making Dubai a heavily congested city
- Extreme summer heat and humidity discourage the use of active transport modes: more covered, climate-controlled walkways and connectors could help
- Public transport plans not always in alignment with private residential development, creating gaps in infrastructure and transport service coverage

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



Extend Dubai metro red line to Sharjah to increase public transport commuting options



Integrate payment systems and vehicle licensing across UAE borders



Facilitate investment in first-/last-mile infrastructure near the public transport network

MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

Much of Dubai's transport investment is in road projects. The authorities will need to invest further in the public transport system, including micromobility and demand-responsive modes of transport, to provide attractive alternatives to cars.

- Road projects will improve links between Dubai and Sharjah, a key commuting corridor, and enhance traffic flow to 20,000 vehicles per hour and reduce transport time by 64 per cent.
- In December 2019, the RTA completed the connection of taxis under its control to the Careem platform, shifting the interactive voice response system for booking and dispatching Dubai taxis to the smart Hala e-hailing system on the Careem app.
- Congestion is the top source of dissatisfaction for most Dubai residents. More than 70 per cent admit to some form of road rage. Satisfaction with public transport seems high, thanks to initiatives such as integrated and cashless ticketing.



Vision and leadership

Dubai's transport policies aim to promote smart mobility for a more efficient transport network. An Innovation Lab programme was launched in 2018 to boost public-private partnerships for funding and encourage technological solutions.

- The city is implementing an AED590 million (US\$160 million) Intelligent Transport System on the roads to include: dynamic messaging; traffic monitoring and data capture; an extended fibre-optic network and more civil infrastructure; and a new command centre.
- The RTA has placed orders for buses that were intended to begin service during Expo 2020, increasing the bus fleet from 1,500 to about 1,850-1,900 by 2024. Residents can use the RTA mobile app to 'Suggest a Bus Route'.
- Dubai relies heavily on fossil fuel for transport. Active modes of transport are not seen as viable options: expansion of covered walkways and cycle paths could help, particularly as a first-/last-mile option in residential areas.



Service and inclusion

The rapid growth of the city means that transport services struggle to keep up. Private developers and public authorities do not always coordinate the execution of their respective projects.

- More buses, metro stops, and water-based modes of transport will be required to serve a population expected to reach 5.2 million by 2030. The goal is to increase the public transport share to 26 per cent from 18 per cent today.
- Plans to include a red line metro extension to Sharjah should be expedited, to reduce congestion in the city. Similarly, funding for the green line extension needs to be approved.
- The air quality is poor due to high use of internal combustion engine vehicles, which cause 26 per cent of greenhouse gas emissions in the city. Alternative fuel vehicles are not yet popular, although the RTA is making efforts to introduce hybrid and EV taxis.

SUMMARY

Dubai's mobility landscape is continually evolving. The city has been pilot testing smart mobility through dedicated smart city zones. However, the popular preference is for private vehicles, partly as a status symbol and partly for reasons of convenience and climate. The aim should be to provide cheaper, safer and faster public transport options.

The city plans to become a global leader in mobility innovation – driverless metro trains are already a reality, but the city is also considering driverless cars, air taxis and other transport modes. Its priority should be to implement all the ground- and water-based expansion schemes in its strategic plan, and to improve transport links with neighbouring emirates.

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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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