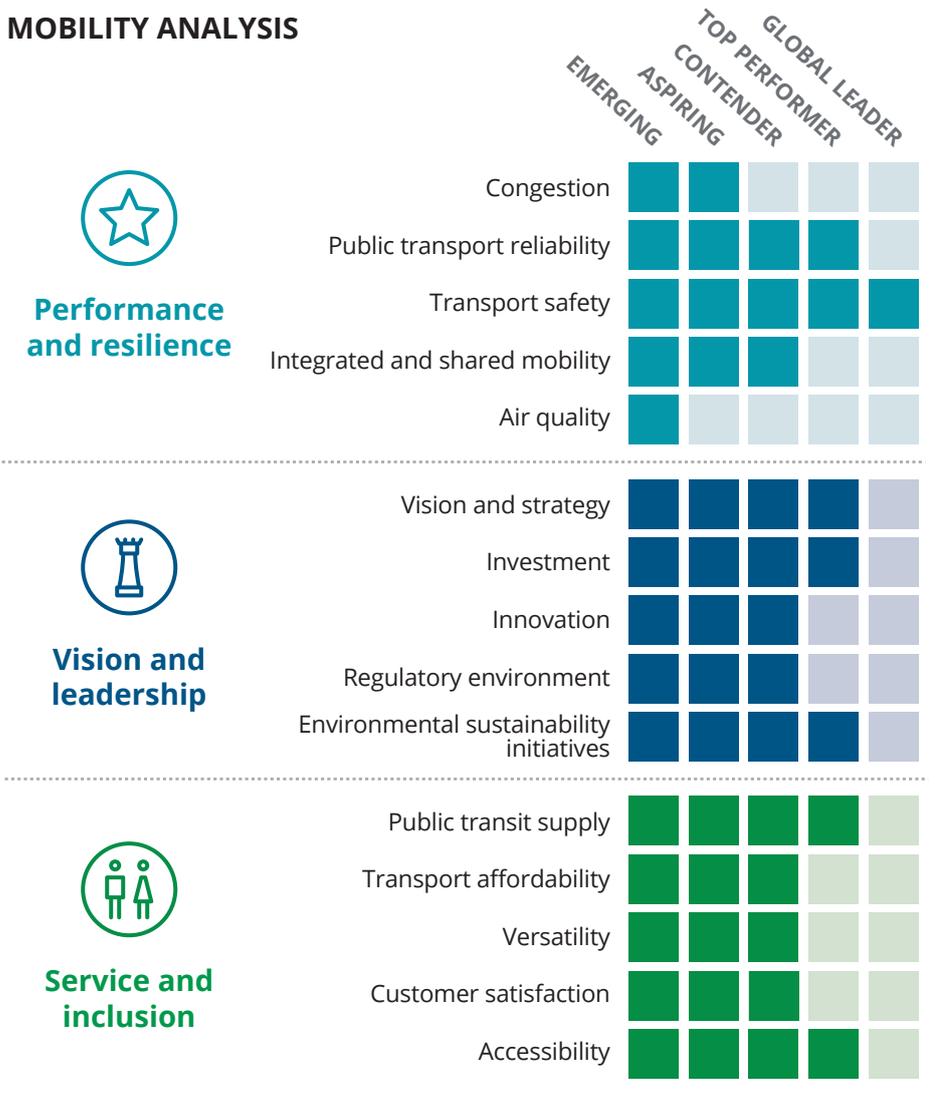
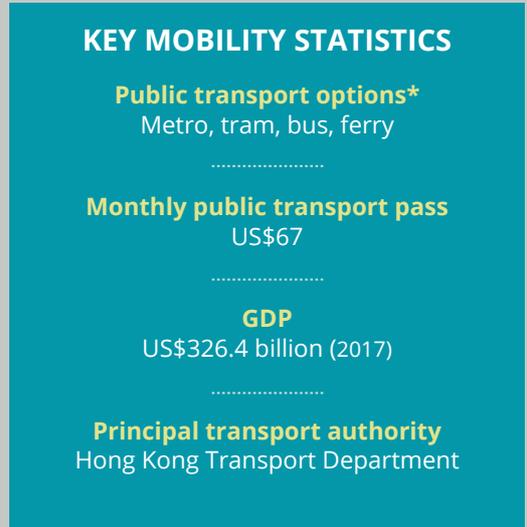


Analysis area

MOBILITY ANALYSIS

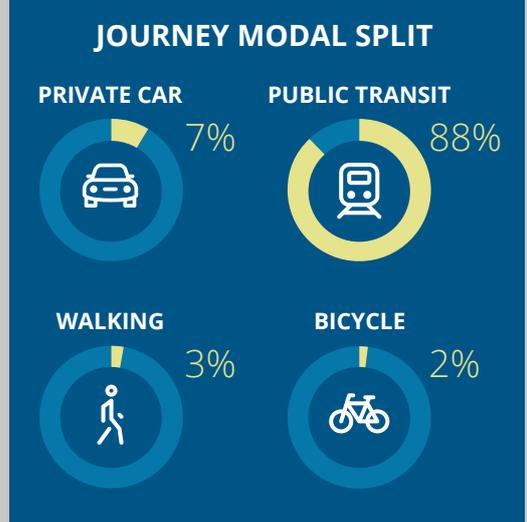


KEY MOBILITY STATISTICS



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

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY CAPABILITY

Hong Kong



STRENGTHS

- Policies promoting public transport expansion
- Efficient use and integration of franchised and nonfranchised bus services
- Successful implementation of an integrated private-public real property development plan that generates additional income

CHALLENGES

- Delays in the installation of modern technologies such as smart traffic lights and smart grids
- Few policies promoting land use for active modes of transportation
- Lack of a conducive legal framework for ride-hailing services

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



Develop a flexible regulatory framework to support shared mobility, including ride-hailing services



Create smart parking infrastructure in and around the central business district



Provide equitable public transport choices for every income group

MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

Hong Kong has a highly punctual metro system. Its roads remain heavily congested and the city is exploring options to reduce this. Air quality scores particularly poorly.

- The Hong Kong metro makes use of artificial intelligence to achieve high punctuality rates and reduce the downtime caused by repairs, making it a reliable transport system.
- To reduce congestion from road transport modes in the central business district, the authorities have been looking at options such as electronic road pricing, stiffer penalties for illegal parking, and road widening.
- Hong Kong has yet to embrace shared mobility models, as the regulatory framework has not been conducive for ride-hailing. Bikesharing operators have also faced issues such as personal data leaks and anti-competitive practices.

 **Vision and leadership**

The city is investing in new highway projects and e-payments infrastructure, while also focusing on commercial electric vehicle (EV) adoption.

- The Hong Kong government is investing approximately HKD 40 billion (USD 5 billion) on the Central Kowloon highway project to enhance linkages between districts and relieve congestion along the existing major east-west corridors. The project, however, faces coordination complexities among different stakeholders, which may jeopardize timely delivery.
- Authorities are focused on increasing the number and use of commercial EVs, and have introduced tax exemptions on the purchase of private EVs.
- The city has one of the oldest public transport contactless payment systems, with plans to upgrade terminals to accept mobile e-payments.

 **Service and inclusion**

Hong Kong is planning to enhance accessibility of its public transport infrastructure with solutions that improve the use of spaces, introduce barrier-free access, and enact a subsidy scheme to improve affordability.

- The Hong Kong 2030+ strategic plan considers a range of solutions that places public transport nodes closer to offices and residential areas.
- The authorities are working toward promoting barrier-free public transport and facilities. All franchised bus operator fleets are low-floor models, and franchised taxi operators are required to make at least 50 percent of their taxi fleet wheelchair-accessible.
- Hong Kong is planning to launch a transport subsidy scheme by 2019, under which commuters with monthly public transport expenses exceeding HKD 400 (USD 60) can claim tax rebates.

SUMMARY

Hong Kong provides one of the most reliable, efficient, accessible, and well-maintained public transport networks, with a highly integrated cross-modal electronic payment system. The high use of public transportation reflects this.

In terms of trials of new technologies, Hong Kong has been lagging and has taken a conservative approach to new mobility models such as ridesharing and autonomous vehicle testing. In addition, the city has scope to expand active modes of transport, which can help in reducing congestion in the central district. Hong Kong has the potential to become a global model for public transport by embracing new technologies and promoting innovation.

CONTACTS

Simon Dixon
Global Transportation leader
Partner
Deloitte MCS Limited
Tel: +44 (0) 207 303 8707
Email: sidixon@deloitte.co.uk

Marco Hecker
Future of Mobility leader
Deloitte China
Tel: +852 2852 6588
Mobile: +86 185 1622 1169
Email: mhecker@deloitte.com.hk

Clare Jiong Lin Ma
Smart City leader
Deloitte China
Tel: +86 21 2312 7461
Mobile: +86 137 0164 6437
Email: clara@deloitte.com.cn

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

Tohmtatsu 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