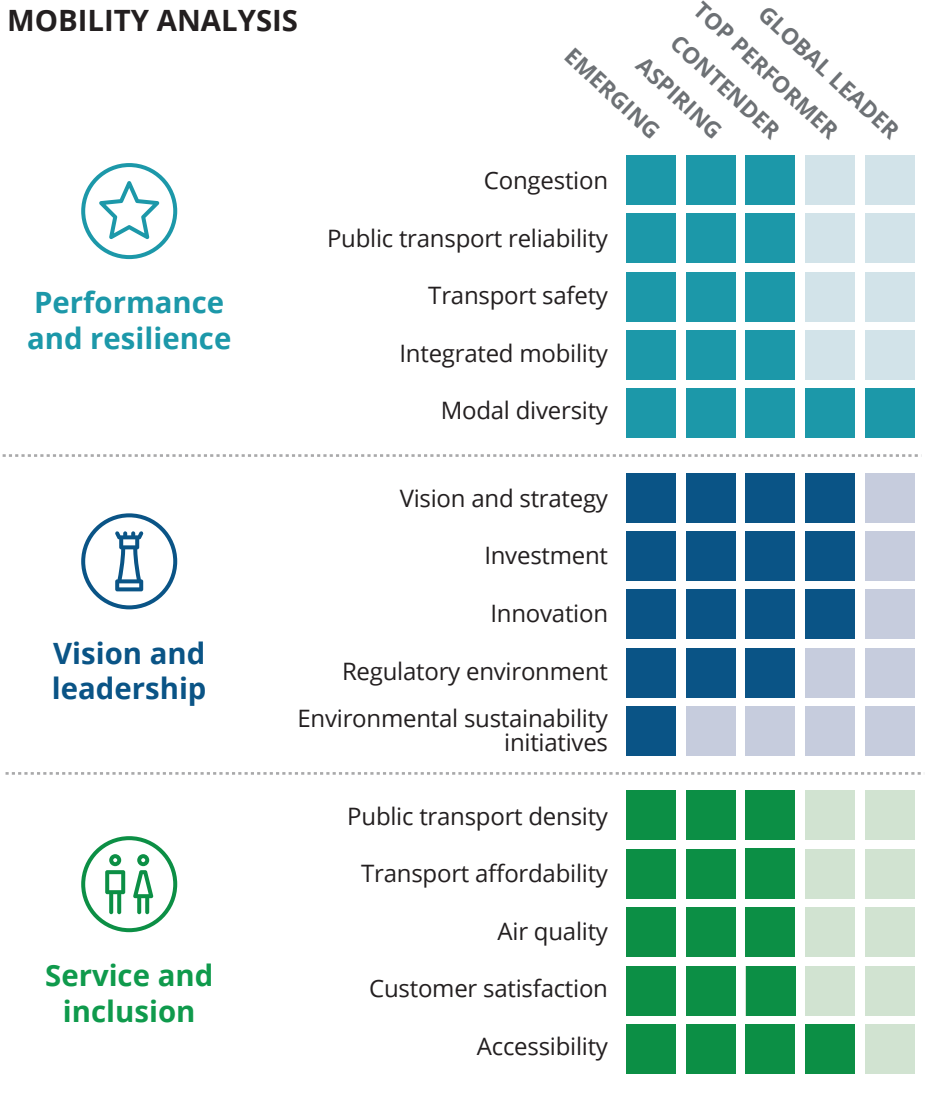


Analysis area: 2,072 km<sup>2</sup> | Population: 4,398,491 (2018) | Population density: 2,123/km<sup>2</sup>

Definition of analysis area: Sydney Urban Area and Localities, as defined by the Australian Bureau of Statistics

### MOBILITY ANALYSIS



### KEY MOBILITY STATISTICS

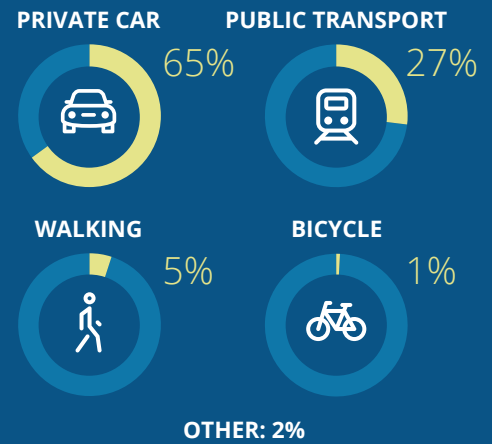
**Public transport options\***  
Commuter rail, light rail including metro and tram, bus, ferry

**Monthly public transport pass**  
US\$150

**GDP per capita**  
US\$57,000 (A\$87,750) (2020)

**Principal transport authorities**  
Transport for New South Wales (TfNSW)

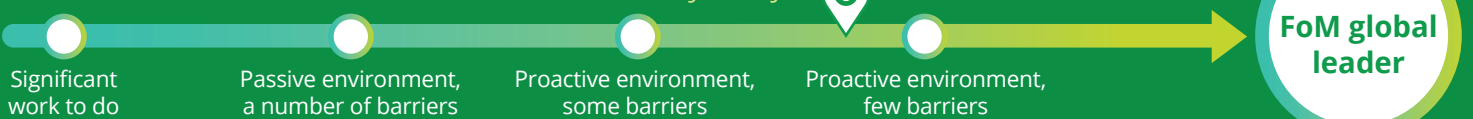
### JOURNEY MODAL SPLIT



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

### FUTURE OF MOBILITY CAPABILITY

Sydney



#### STRENGTHS

- Strong regulatory support from government authorities to make evidence-based decisions and improve public transport
- High levels of investment in road and rail transport infrastructure
- Innovative on-demand microtransit services in suburbs are successful and popular with passengers

#### CHALLENGES

- Demand for public transport continues to outstrip supply despite major projects to increase capacity – risk of always playing catch-up
- Peculiarities of topography, climate and urban sprawl have meant that the uptake of cycling is still low (especially considering the popular addiction to sport!)
- Congestion remains a top issue to address: the government is now considering a road charging scheme

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



Develop credible, long-term transport infrastructure plans, insulated from political constituencies and electoral cycles



Prioritise improvements in cost management given the number of planned long-term, large-scale capital projects



Develop strategies to deal with increased use of private cars following the COVID-19 travel restrictions

## MOBILITY ANALYSIS FURTHER DETAILS:



### Performance and resilience

Sydney is a city in which the car still dominates, although TfNSW is expanding the bus and rail network and facilitating a unified payment system across all modes of transport. The city has also strengthened safety initiatives under its Road Safety Plan 2021 to reduce fatalities.

- OpalPay, the transport smart card, has increased the number of modes that it covers, including private ferries and on-demand transport. It now covers the entire network. As of mid-2019, public ferries, trains and buses were upgraded to accept contactless payments.
- TfNSW's Road Safety Plan 2021 includes the world's first programme for mobile phone detection cameras. There has been early success with the rollout of the programme. It mandates stronger action against drunk, fatigued or speeding drivers, with a goal of reducing road fatalities by at least 30 per cent.



### Vision and leadership

The government has allocated A\$7.5 billion (US\$5.1 billion) for the building of new metro and light rail lines. Its liberal Open Data regime contains extensive real-time data sets that have been used in developing a number of Sydney-specific products.

- Sydney's fully automated metro was launched in May 2019, and work commenced on Phase 2 (with completion due in 2024) to extend the 36 km of line to 55 km, and increase the number of stations from 13 to 31. Plans have been announced for a second line, Sydney Metro West.
- The city's light rail network has seen extensive additions. The L2 Randwick line has opened and two planned Parramatta lines are expected by 2023.
- The Western Harbour Tunnel project was launched in 2020, making use of innovative procurement models.



### Service and inclusion

Sydney's transport systems saw fare reductions across a range of transport services from mid-2019. Transport planners are seeking to improve accessibility for people with reduced mobility.

- A cap on public transport fares was introduced in June 2019. Adults pay a maximum of A\$50 per week. Other fares include a daily maximum of A\$8.86 per trip, a 50 per cent discount after eight trips in a week, and unlimited public transport for A\$2.70 on Sundays.
- Keoride and BRIDJ are two on-demand transport services to help residents in Sydney's low-density suburbs with last-mile connections to transport hubs.
- The NSW government committed A\$334 million to its Transport Access Program to retrofit 68 railway stations over a period of four years.

## SUMMARY

In many ways, fast-growing Sydney is a victim of its own success. Its population has grown by more than 800,000 since 2011, and passenger numbers have increased by over 20 per cent across Sydney's train network since 2015. More than 420 million journeys are made annually. The government is investing billions of dollars to increase the stock of public transport but is struggling to keep up with demand.

Transport planners are trying to coax more efficiency out of the system by developing integrated ticketing solutions and improving the availability of real-time information for passengers across all transport modes.

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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](https://deloitte.com/insights/mobility-index).

For Deloitte's insights on the Future of Mobility, visit [deloitte.com/insights/future-of-mobility](https://deloitte.com/insights/future-of-mobility).

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