

Analysis area

Analysis area: 791 km<sup>2</sup> | Population: 1,456,619 (2016) | Population density: 1,841/km<sup>2</sup>

Definition of analysis area: Helsinki Capital Region that covers four municipalities including the city of Helsinki

### MOBILITY ANALYSIS

EMERGING  
ASPIRING  
TOP PERFORMER  
CONTENDER  
GLOBAL LEADER



#### Performance and resilience

Transit supply	■	■	■	■	■
Resilience and reliability	■	■	■	■	■
Road safety	■	■	■	■	■
Integrated and shared mobility	■	■	■	■	■
Air quality	■	■	■	■	■



#### Vision and leadership

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



#### Service and inclusion

Public transit coverage	■	■	■	■	■
Affordability	■	■	■	■	■
Versatility	■	■	■	■	■
Customer satisfaction	■	■	■	■	■
Ease of use	■	■	■	■	■

### KEY MOBILITY STATISTICS

Metro, tram, bus  
Public transit options

24.9 hours/year  
Time spent in congestion

\$124  
Average public  
transit pass/month

\$76 billion  
GDP  
(OECD report, 2013)

Major transit authority  
Helsinki Regional Transport Authority

Note: All dollar amounts are in USD.

### JOURNEY MODAL SPLIT

PRIVATE CAR



39%

PUBLIC TRANSIT



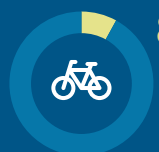
30%

WALKING



21%

BICYCLE



8%

OTHER: 2%

### FUTURE OF MOBILITY ANALYSIS



#### STRENGTHS

- Presence of apps based on Mobility-as-a-Service (MaaS) that integrate private and public transport options
- High public transport adoption with plans to reduce car ownership in the city
- Autonomous bus trials and deployment in a relatively small urban area

#### CHALLENGES

- Fare for monthly transportation pass is costly compared to other cities
- Parking facility is costly compared to other cities
- Lack of consistency in performance, customer satisfaction, and investment support

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



Collaborate with companies using automotive technology to leverage integrated network and accelerate innovation



Augment the development of MaaS to become the role model for implementing the solution in other cities



Scope to improve and incentivize further active transport options such as cycling

## MOBILITY ANALYSIS FURTHER DETAILS:



### Performance and resilience

With its efficient and well-balanced transportation system, Helsinki is a top performer. The city achieved high scores across all categories.

- Helsinki has a high modal share for public transit and an overall strong mix of active transport options.
- Low modal share of private vehicles is a key factor behind Helsinki's low carbon dioxide emissions and low traffic congestion levels.
- It has a highly integrated and balanced public transit system with numerous modes: bus, tram, metro and commuter rail, and excellent coverage and connectivity throughout the entire metropolitan area.



### Vision and leadership

Helsinki also stands out as a leader in innovation. The city's plan for 2050 paints a futuristic picture of a sustainable, integrated, and highly convenient transit system.

- The city's goals include making public transit the No. 1 choice for travel by 2025 and phasing out private cars by 2050 through shared mobility, demand-responsive transport, and pedestrian-centric urban design.
- Finland is at the forefront of autonomous vehicle operations. With its launch of the RoboBusLine in 2017, Helsinki is now providing regular public transit service using self-driving buses.
- Electric cars currently constitute just 1.3 percent of new cars. However, new subsidy schemes may improve adoption. The city predicts that majority of cars will be electric by 2050.



### Service and inclusion

Helsinki's transportation system achieved top scores in customer satisfaction, largely due to its ease of use. Helsinki is leading the world in MaaS technology.

- The highest customer satisfaction within our sample: Helsinki scored 88 percent customer satisfaction for public transport services in spring 2017, despite being relatively expensive. High security, convenience and ease of use are the main contributing factors for the high score.
- Another factor behind the high ease of use and satisfaction scores is the new MaaS app. Created by a Helsinki start-up, the app allows citizens to travel on public and private services via a monthly subscription.

## SUMMARY

Mobility in Helsinki is well developed and the city's commitment to innovation is consistently driving further improvement to the system. The public transport system is highly reliable and accessible throughout the city. Cycling is also popular, although it lags behind other cities.

Helsinki is leading the way with Future of Mobility concepts such as MaaS and shared mobility. The successful launch of self-driving public transport buses could provide early lessons to cities looking to adopt similar technologies.

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

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

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