



Analysis area

London

Analysis area: 1,569 km² | Population: 8,787,892 (2016) | Population density: 5,601/km²

Definition of analysis area: Greater London, which includes 32 boroughs and the City of London

MOBILITY ANALYSIS



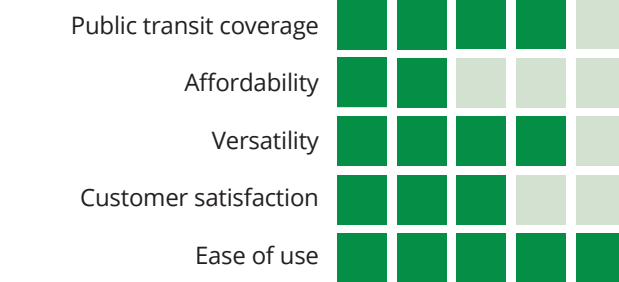
Performance and resilience



Vision and leadership



Service and inclusion



KEY MOBILITY STATISTICS

Tube, tram, bus, rail
Public transit options

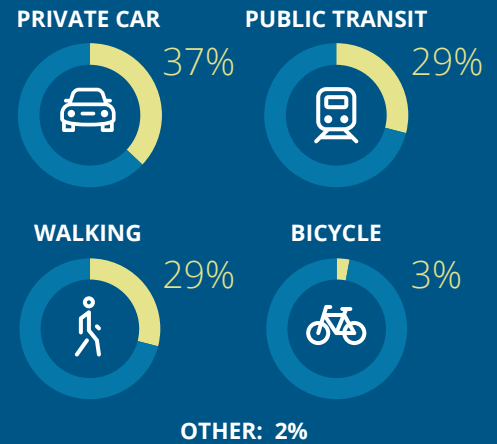
73 hours/year
Time spent in congestion

\$159 Average public transit pass/month | \$665.86 billion GDP (OECD reported, 2013)

Major transit authority
Transport for London (TfL)

Note: All dollar amounts are in USD.

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY ANALYSIS

London



STRENGTHS

- Transport for London encourages open data, use of active modes of transit, and deployment of real-time traffic analysis tools and congestion charges
- Innovative transport ecosystem features world-class financial investors, academic collaboration, and start-ups
- Active efforts to reduce pollution through ambitious zero-emission plan and support for EV buses

CHALLENGES

- Expensive transportation system, including public modes and private cars
- Crowded transport system and heavy traffic congestion with high percentage of delays
- Multiple authorities for road maintenance projects

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



MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

Congestion and struggling reliability of metro/train services may increase pressure on London's large and extensive public transit network.

- Healthy modal split: Only 37 percent of trips are made by car, close to 29 percent are made by public transport, and 29 percent are made by active modes of transport. A key factor, along with the congestion charge, is London's relative success in managing road traffic with modern methods such as SCOOT technology.
- Reliability of metro/tram services: London needs to improve the reliability of its metro/tram services (15 percent of metro/trams are delayed) to accommodate increasing passenger pressure.
- Vision to reduce traffic-related fatalities: In an attempt to reduce traffic-related fatalities, TfL has adopted Vision Zero with ambitious targets such as no fatalities in or by a London bus by 2030 and elimination of all fatalities and serious injuries from road collisions by 2041.

 **Vision and leadership**

London has a long history of embracing new technologies, and TfL's vision and strategy leads the way for global mobility.

- Frequent collaborations between public and private bodies are encouraged for providing innovative solutions to transport problems.
- High scores for innovation and regulatory environment through ambitious plans to create "healthy streets" and prioritizing alternative fuels and power sources.
- TfL has adopted a clear strategy to mitigate existing challenges, such as zero-emission initiatives to reduce pollution, measures to improve safety on the roads and efforts to strongly promote active transport to make affordable commuting more feasible.

 **Service and inclusion**

London has a versatile, user-friendly, and vast public transit network, but is also one of the most expensive cities to travel.

- London is one of the most expensive cities in the world to travel in, in terms of both private and public transport.
- Accessibility improvements: Significant efforts have gone into providing step-free access in stations and vehicles.
- Highly popular smart ticketing system: More than 1.8 million journeys per day using contactless payment cards are registered by TfL on a regular basis and are accepted across the transport network.

SUMMARY

The transport authority, TfL, encourages innovation and partnerships with private bodies making London a leader in many policy areas such as open data and integrated payments. The city was originally designed for commuters walking to work every day. With the advent of modern mobility solutions and ever-increasing demand for transport, London's infrastructure struggles to keep up and the combination of severe congestion, unreliable service, and unsafe roads results in lower customer satisfaction. High fuel prices and manpower costs make both private and public transport more expensive. London is well-placed to use its innovation and regulatory ecosystems to tackle these issues.

CONTACTS

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

Haris Irshad
Strategy & Operations
Senior manager
Deloitte MCS Limited
Tel: +44 7879 487623
Email: hirshad@deloitte.co.uk

Angus Knowles-Cutler
UK vice chairman and
Managing partner, London office
Deloitte LLP
Tel: +44 20 7007 2946
Email: aknowlescutler@deloitte.co.uk

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

Tohmatsum 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.