**MOBILITY ANALYSIS**

**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

**JOURNEY MODAL SPLIT**

- **PRIVATE CAR**: 37%
- **PUBLIC TRANSIT**: 29%
- **WALKING**: 29%
- **BICYCLE**: 3%
- **OTHER**: 2%

**FUTURE OF MOBILITY ANALYSIS**

- London: FoM global leader

**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 MOBILITY STATISTICS**

- **Tube, tram, bus, rail**
  - Public transit options
  - 73 hours/year
- **Average public transit pass/month**: $159
- **GDP (OECD reported, 2013)**: $665.86 billion

**Analysis area**
- **Greater London**, which includes 32 boroughs and the City of London

**Definition of analysis area**
- **1,569 km²**
- **Population**: 8,787,892 (2016)
- **Population density**: 5,601/km²

**Deloitte City Mobility Index**

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

- Optimize the use and capacity of public transit to meet future demand
- Increase the role of demand management plans to better balance demand and supply
- Focus on multimodal integration across public and private transportation that accounts for the first and last mile

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.
- 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.

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.

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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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