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

KEY MOBILITY STATISTICS

- Rapid transit, commuter rail, bus
- Public transit options
- 89 hours/year
- Time spent in congestion
- $211
- Average public transit pass/month
- $1,222 billion GDP (OECD report, 2013)

Major transit authority
Metropolitan Transportation Authority (MTA)
(includes all service providers and subsidiaries)
(Other transit agencies: NJ Transit, PATH agencies, and CT Transit. The region may also have small county-level service providers and private service providers.)

Note: All dollar amounts are in USD.

JOURNEY MODAL SPLIT

PRIVATE CAR 55%
PUBLIC TRANSIT 33%
WALKING 6%
BICYCLE 1%
OTHER: 5%

FUTURE OF MOBILITY ANALYSIS

- Significant work to do
- Passive environment, a number of barriers
- Proactive environment, some barriers
- Proactive environment, few barriers

STRENGTHS
- Strong adoption of new mobility models such as ridesharing
- One of the largest public transport networks in the world, with various transit options across the region
- Ambitious, wide-ranging, forward-looking vision and strategies for public transport and other mobility solutions, such as promoting active transportation modes
- Optimistic outlook on creating infrastructure for electric vehicles

CHALLENGES
- Low reliability and overcrowding encourage commuters to avoid public transit and use private cars and taxis
- Need to improve coordination between service providers across the ever-growing urbanized region
- Transit authorities financial instability
- Decrease in public transit passengers and rising operational costs, with relatively low customer satisfaction
Key focus areas to improve city mobility and realize the Future of Mobility:

**MOBILITY ANALYSIS FURTHER DETAILS:**

**Performance and resilience**

Even with a diversity of transit options, New York’s transport system is struggling to deal with the existing demand, which is predicted to grow further in the future.

- One of the largest and oldest subway networks: New York City (NYC) has the highest number of metro stations in the world, offering 24-hour service every day of the year. However, the system requires constant repairs and upgrades.
- NYC has the second-highest ranking for congestion, after Los Angeles. Private cars account for 55 percent of modal trips.
- Subway delays: The subway system faces reliability and safety issues. Reduced reliability, combined with reduced spending on maintenance and use of old equipment, has led to a decrease in passengers in 2016, which was not seen since 2009. In addition, overcrowding on platforms and increasing loading time have also led to substantial delays.

**Vision and leadership**

The region has actionable plans, and is on track to meet the 80x50 sustainability target (80 percent greenhouse gas reduction by 2050).

- Recent changes to state laws have allowed testing of driverless cars on public highways in 2017, though the regulations are still quite restrictive in and around the city region and will require strong public-private partnership.
- Starting in 2018, as a part of the city administration’s target for 20 percent of the motor vehicle registrations in NYC to be electric by 2025, the city will invest $10 million to develop fast-charging hubs with up to 20 chargers per site.
- Launched in 2017, the Fourth Regional Plan for NY-NJ-CT area includes 61 recommendations for upgrading the bus and subway network. It also advocates for the implementation of congestion charges and tolls to manage traffic.

**Service and inclusion**

The region’s public transit system offers versatile options with different transport modes that cater to a large population of Manhattan region.

- Highly accessible system: Residents have wide access to different modes of public transport across a large network.
- Distinct socioeconomic cleavages across different modes of travel: Prices are high; bus riders tend to have a lower income than subway passengers.
- Strong focus on security: Security has improved markedly, thanks to an emphasis on passenger whistleblowing and the deployment of smart monitoring systems.

**SUMMARY**

With one of the oldest public transit networks in the world, NYC and has seen constant changes to its transit system. To modernize and integrate the transit network across the metropolitan region, this needs to continue. The region also needs increased participation of local county representatives to ensure that vision and strategies are not limited to just NYC’s five boroughs.

In addition, the region’s transit authorities—the MTA, PATH, and NJ Transit—need to come together to address their financial woes by creating a joint financial management plan. With a focus on innovation, the city can do more to utilize digital and analytics solutions to improve the existing subway system. Overall, the region shows great promise in realizing the future of mobility, and can prove to be one of the success stories in coming years.

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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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