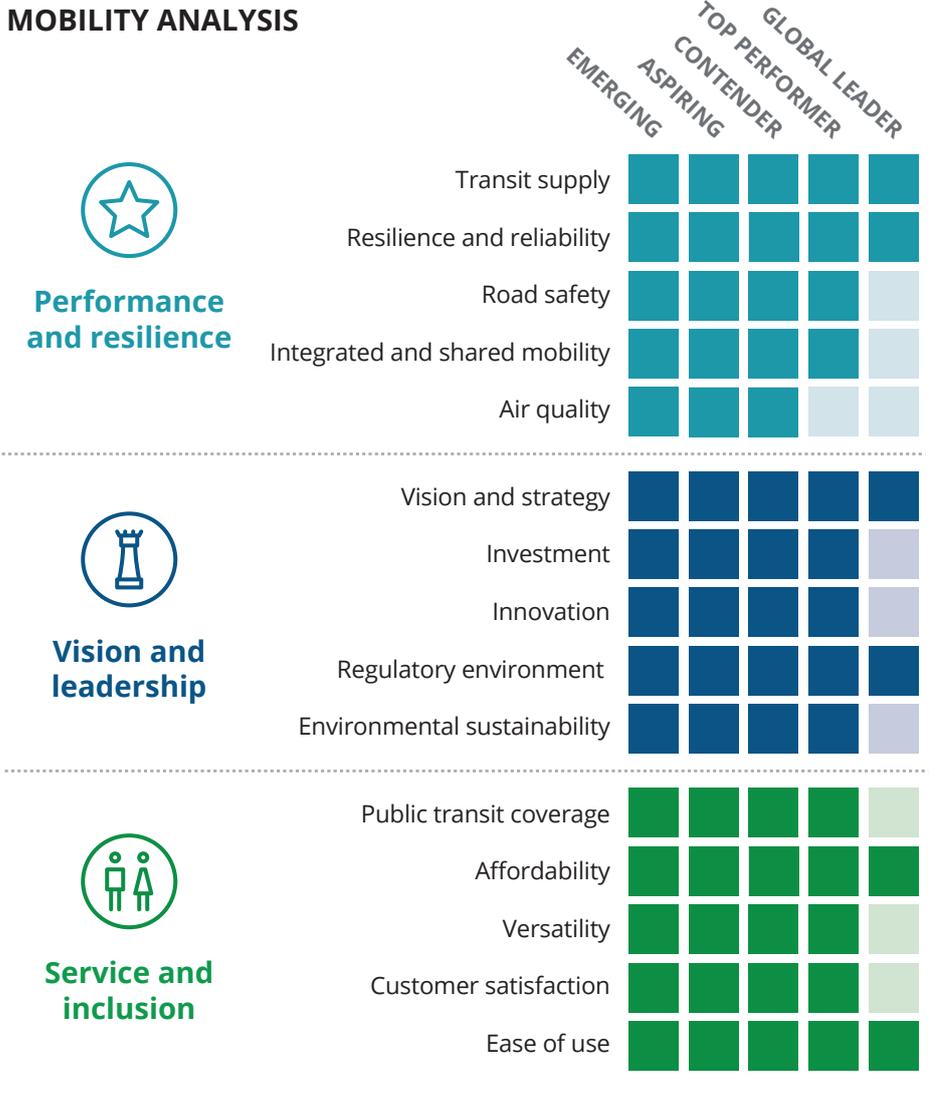
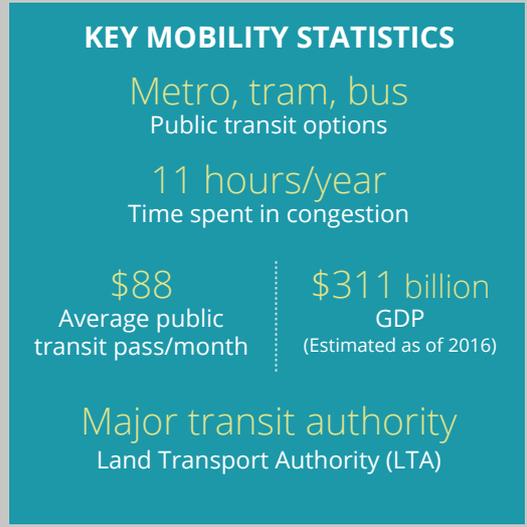


MOBILITY ANALYSIS

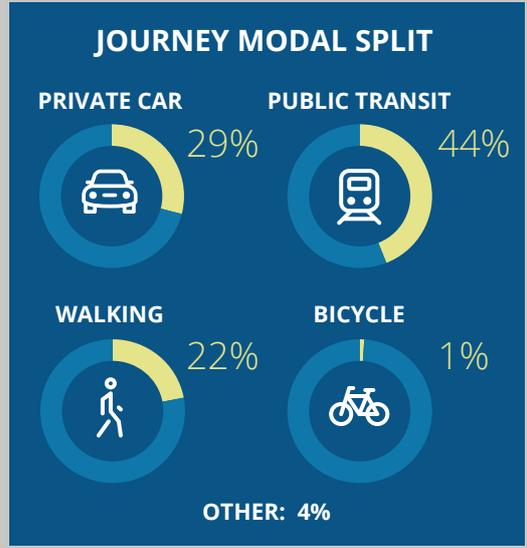


KEY MOBILITY STATISTICS



Note: All dollar amounts are in USD.

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY ANALYSIS



STRENGTHS

- Highly affordable public transport system, supported by high income levels and standard of living
- Availability of integrated ticketing options across modes, with strong focus on using technological advancements
- High adoption of zero-emission vehicles and efforts to bring autonomous vehicles into mainstream travel

CHALLENGES

- Increasing demand for stronger door-to-door transit to cater to larger population
- Lack of interagency coordination for infrastructure projects
- Creating seamless network of intermodal transport and adoption of Mobility-as-a-Service (MaaS)

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



Increase public transit capacity and reliability to meet future demand

Develop accessible modal system for aging population and last-mile solutions

Promote transit signal priority techniques

MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

Recognizing the strategic benefits of integrating transportation and urban planning to balance land-use demands, Singapore has built a robust public transit system.

- Due to its comprehensive rail and bus network, Singapore’s modal share of public transit remains high. It is becoming a car-light society.
- Cars are increasingly unaffordable in Singapore, deterring the use of private vehicles. Both carsharing and bikesharing are expanding.
- To promote further its intermodal transit system, Singapore plans to expand the coverage of its rail network to 360 km by 2030 serving all the major hubs in the island.

 **Vision and leadership**

Ambitious plans make Singapore one of the smartest mobility cities of the world. The Singapore government is focusing on public transit network expansion along with high-quality data collection.

- Singapore is on track to attain a highly sustainable transportation system with the increased testing of autonomous vehicles. It plans to unveil fully operational driverless rides in three towns by 2022.
- Singapore is also promoting active transportation as the primary mode of transit, by promoting integrated sheltered walkway connectivity to all public transit nodes and creating 700 km of bicycle lanes by 2030.
- To capitalize further on its highly integrated payment system, Singapore will introduce wearables that can be used in place of smart cards. The LTA is also partnering with private players to promote account-based ticketing, which will use credit/debit cards across the city’s public transit system.

 **Service and inclusion**

Singapore performs well compared to other cities, due to its high-quality public transit infrastructure and affordable services.

- Singapore has benefited from its high-quality roads and unified management under the Land Transport Authority, it has high customer satisfaction with its public transit system and low congestion (11 hours per person per year).
- The city has made concerted efforts to keep public travel fares low; it has one of the lowest average train fares compared to Asian cities. A monthly travel pass is cheaper than most of the cities in the index, especially noteworthy given the high level of service provided.
- Singapore’s Intelligent Transport System (ITS) master plan involves adoption of big data, monetization of roads, and mobility on demand to create tailored mobility for the residents.

SUMMARY

The island state of Singapore boasts one of the best transit systems in the world and is striving toward creating a smart and inclusive transit system that is expected to cater to an aging demography. By discouraging private-vehicle ownership through high taxes, significantly ramping up the quality of public transit modes, and maintaining low fares, Singapore also hopes to achieve a highly sophisticated transportation system with minimal reliance on private modes of travel. The island city network benefits from an integrated ticketing and payment system, and enjoys high customer satisfaction. One of the key challenges it faces, though, is matching the pace of infrastructure development with the ambitious smart mobility plans it has in place.

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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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