

Analysis area

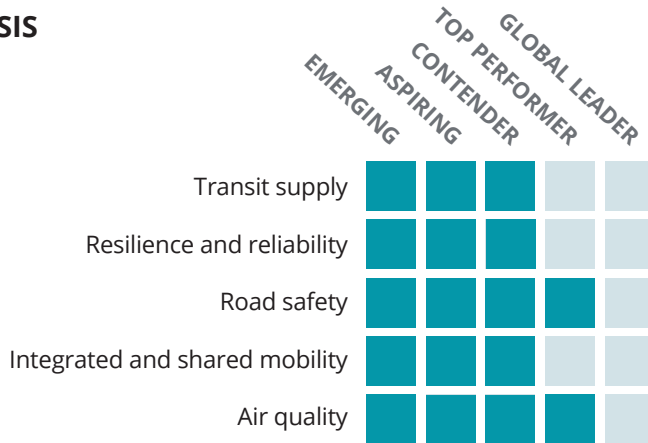
Analysis area: 5,906 km² | Population: 5,928,040 (2014) | Population density: 1,004/km²

Definition of analysis area: Toronto Census Metropolitan Area defined by Statistics of Canada

MOBILITY ANALYSIS



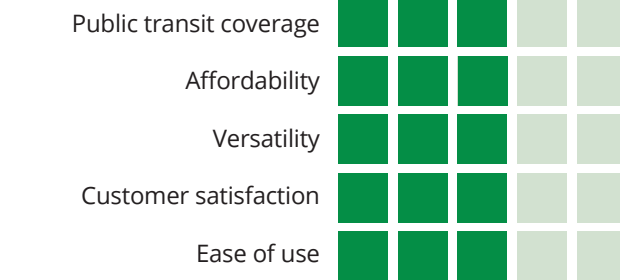
Performance and resilience



Vision and leadership



Service and inclusion



KEY MOBILITY STATISTICS

Metro, light rail, bus
Public transit options

45.6 hours/year
Time spent in congestion

\$99 Average public transit pass/month

\$276 billion GDP
(OECD report, 2013)

Major transit authority
Metrolinx

(Other transport agencies: TTC, Go Transit, MiWay/Mississauga Transit, Brampton Transit, Durham Region Transit, Oakville Transit, Milton Transit)

Note: All dollar amounts are in USD.

JOURNEY MODAL SPLIT

PRIVATE CAR



70%

PUBLIC TRANSIT



23%

WALKING



5%

BICYCLE



1%

OTHER: 1%

FUTURE OF MOBILITY ANALYSIS



STRENGTHS

- Commitment to developing mobility sharing services, and plans to evaluate autonomous vehicles and traffic management solutions
- Launch of driverless car research hub
- Smart driving initiative helps people find alternative travel options to driving

CHALLENGES

- No city plan around electric vehicles and low adoption despite provincial investment
- Journey planning tools not user-friendly and fail to integrate journeys across the Greater Toronto Area

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



MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

Toronto's public transit system has grown significantly in recent years, but increased funding is required to meet needs of the region; safety initiatives have proved successful.

- The Canada-Ontario Public Transit Infrastructure Fund agreement will address key challenges on the network such as fixing aging tracks and building new stations.
- The Toronto Transit Commission's ambitious plan to modernize the system, including fleet and infrastructure renewal, has improved customer satisfaction within the city core. Surrounding regions must follow suit by developing the networks and improving integration.
- Safety initiatives such as Vision Zero and the Road Safety Modernization Program have yielded successful results through measures such as Seniors Safety Zones, red light cameras, and road safety audits.

 **Vision and leadership**

Toronto's long-term vision is focused on transit network expansion with ambitions to foster a smart transport revolution in the future.

- Metrolinx has launched a plan for 2041, which aims to connect the GTA regions along rapid transit corridors: these will include Regional Express Rail, bus rapid transit, and light rail.
- Despite Ontario's subsidy of up to \$14,000 for electric vehicle purchases, EV sales represent only 0.5 percent of new cars.
- The Autonomous Vehicle Innovation Network (AVIN) and the upcoming launch of a driverless car research hub, supported by the University of Toronto and its mobility partners, provide an opportunity for Toronto to become an early adopter.

 **Service and inclusion**

Toronto's transportation system scores well in terms of versatility although the services are costly, which puts a burden on passengers.

- The city has a broad range of transportation options, including extensive public transit, commuter rail, and a large carsharing and bikesharing network, with strong commitment by Metrolinx to wheelchair accessibility.
- Affordability is a major concern for users of Toronto's transit system, particularly due to the lack of fare integration across the GTA's transit authorities; this has been improving in recent years.
- Lack of reliable and user-friendly regional trip-planning tools across the GTA.

SUMMARY

Toronto has a well-developed public transport network in the city core, but suburban areas are underserved and highly congested. Recent investments aim to address this problem by building new rapid transit routes and plans are in place to improve integration across transit authorities throughout the larger metropolitan area.

The city is open to embracing Future of Mobility technologies and has included space for these in its regional transport plan. Metrolinx is committed to reducing the reliance on private cars in the region through initiatives such as Smart Commute and development of rapid transit corridors. The government of Ontario has committed funding aimed at increasing adoption of electric vehicles but the city's EV infrastructure still lags behind.

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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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