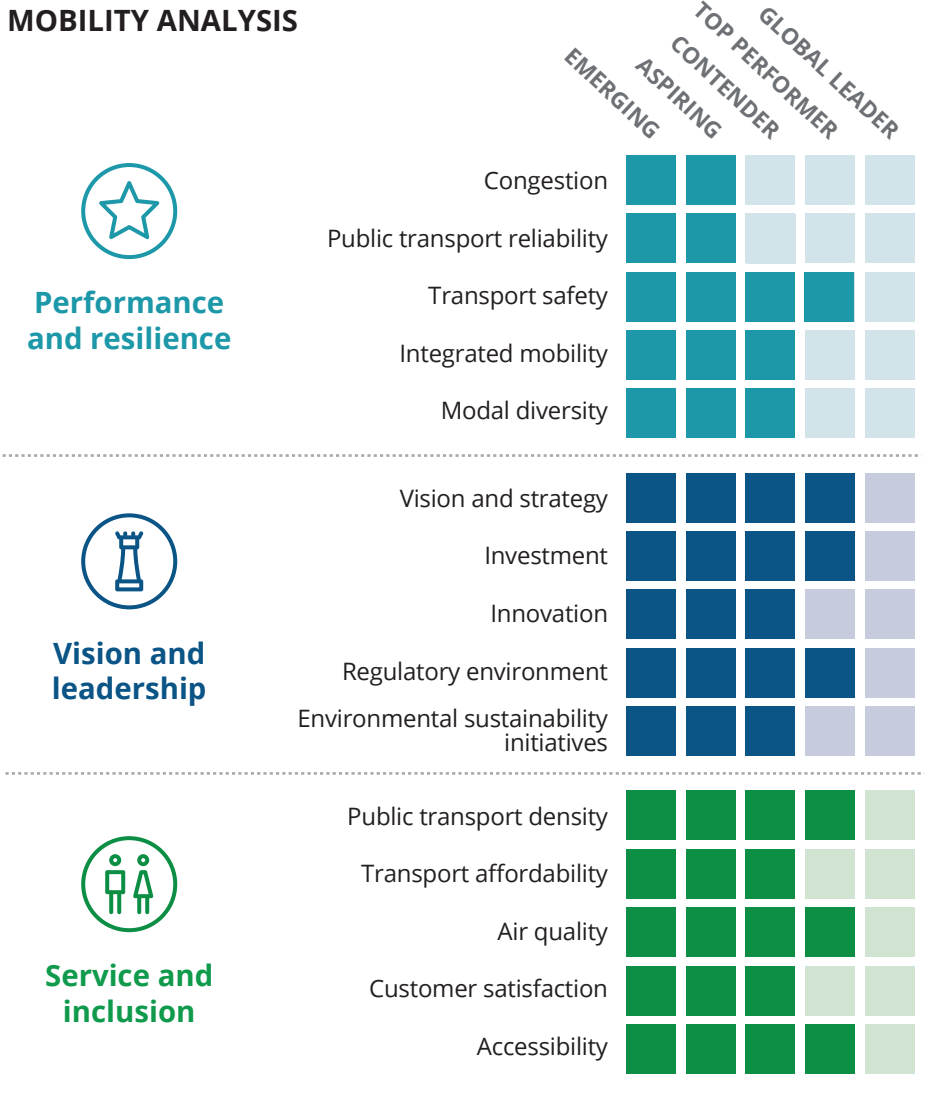


Analysis area

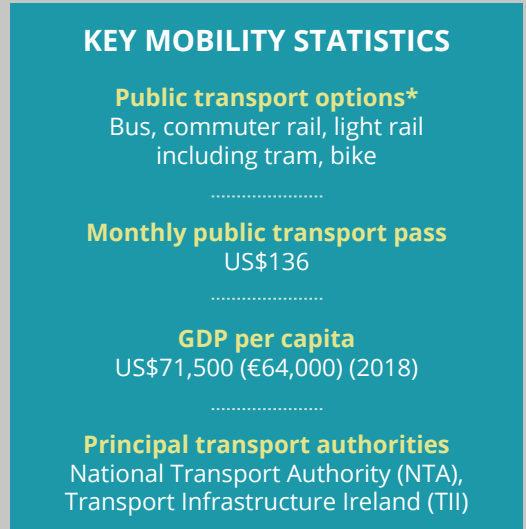
Analysis area: 921 km<sup>2</sup> | Population: 1,395,600 (2019) | Population density: 1,515/km<sup>2</sup>

Definition of analysis area: Dublin Region, including Dublin City, Dún Laoghaire-Rathdown, South Dublin and Fingal

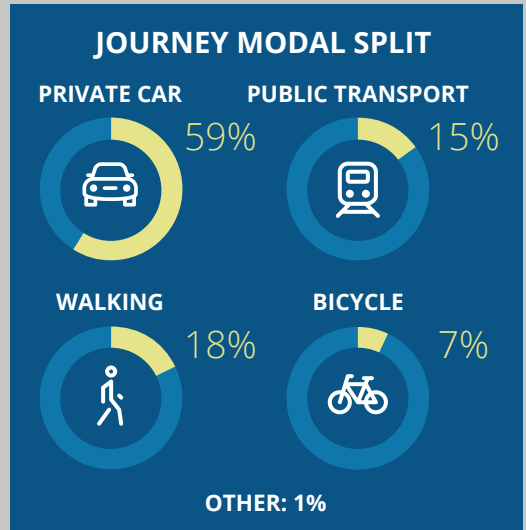
### MOBILITY ANALYSIS



### KEY MOBILITY STATISTICS



### JOURNEY MODAL SPLIT



\*Regulated, licensed, subsidised and monitored by principal transport authorities.

### FUTURE OF MOBILITY CAPABILITY



#### STRENGTHS

- Continual upgrades to public transport stock, resulting in more modern fleet
- Plans in place to build a metro connecting the City to the airport and beyond North Dublin
- Disciplined investment in public transport has resulted in newer modes achieving payback sooner than expected

#### CHALLENGES

- Multiple modes of transport in the same streets can result in challenging conditions; cyclists tend to be squeezed as cars and trams dominate the space
- A shortage of housing in or near the city centre results in people travelling farther and relying on private vehicles
- Delays to public transport projects such as the metro and cycle lanes that can reduce private vehicle use

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



**Prioritise investment on public transport options over road improvements**



**Hasten switch of commuter rail trains from diesel to electric**



**Give road priority to shared and active modes of transport, through dedicated lanes**

## MOBILITY ANALYSIS FURTHER DETAILS:



### Performance and resilience

Dublin has a growing population and a shortage of office and residential space, resulting in longer daily commutes in private vehicles.

- A major reorganisation of the BusConnects network will include rapid transit corridors, more orbital routes and more frequent service. However, it has met with some public opposition, causing plans to be scaled back pending further consultations.
- The Leap contactless smart card, used on 80 per cent of all public transport journeys in 2018, is being upgraded to include park & ride fares and discounts for frequent use.
- The bike-share programme Dublinbikes has grown to 1,600 bikes at 116 stations since it started in 2009. Yet only about 500km of cycle lanes have been built out of the plan for 2,400 km by 2023, as investment has shifted to expansion of the tram system.



### Vision and leadership

The city has allocated €4.6 billion (US\$5.1 billion) for the period 2019-2024, to include buses, heavy and light rail, sustainable modes of transport and integration measures.

- Dublin's transport strategy prioritises buses as the main method of public transport, due to low population density in many suburbs. Large investments in signalling, level crossings and electrification aim to increase rail journeys to 75 million by 2025, up from 48 million in 2018.
- The plan to develop the Metro North and Metro West lines was scaled back substantially, with one line abandoned and the other line shortened. This line is due to open in 2027, and TII has launched consultations on the procurement strategy.
- The NTA is seeking to procure 600 hybrid buses over the next five years. Electric vehicle uptake, while growing rapidly, is still only around 5,000 for all of Ireland.



### Service and inclusion

The public has welcomed expansion to the transport network, seen by increases in passenger numbers. Consistent efforts to improve the public network's accessibility contributed to this and to higher satisfaction ratings.

- Passenger numbers on all forms of public transport increased by 7.5 per cent in 2018. The expansion of the bus network and increased capacity on tram lines drove the largest increases, at 6.7 and 4.2 per cent respectively.
- Overall customer satisfaction increased by two percentage points in 2018; scores for weekend frequency, hours of operations and integration of services were lower.
- Dublin's increasingly accessible transport fleet will see improvements to older bus and train stations in need of retrofits. The NTA has introduced the 'just a Minute' card for those who are developmentally disabled or easily overwhelmed by transport.

## SUMMARY

Dublin has improved its challenged transport system, focusing on efficiency gains by integrating the various transport modes. As the city population grows, supply will need to expand further into the commuter belt. A number of transport plans address this through investments in network expansion of buses and trains, improvements in ticketing, and an increase in the cycling infrastructure. However, the biggest share of transport budgets goes into roads – just 20 per cent goes to trains, buses, trams and cycling infrastructure. The government wants to encourage a shift from private vehicle use, and experience to date suggests that Dubliners are keen to get out of their cars and into other modes of transport – they just need the supply to match their (latent) demand.

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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](https://deloitte.com/insights/mobility-index).

For Deloitte's insights on the Future of Mobility, visit [deloitte.com/insights/future-of-mobility](https://deloitte.com/insights/future-of-mobility).

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