

Beyond the Pandemic: Mobility Trends, Opportunities and Challenges in Cities

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Scope

Key findings

CASED acronym underpins the major urban mobility trends

Smart mobility is gaining prominence as global urbanisation rates rise

Remote work has the power to change commuting

Spending to shift from owned to service-based mobility

Commuting habits

Most commuting is done using public transport and passenger car travel

Public transport investment is critical in fast-growing cities

Case study: Luanda to start building a light rail system in 2022

Flexible/remote working could be a solution in cities where commuting is frequent

15 minute city model will be easier to achieve in cities with short commutes

Multi-modal mobility is planting the seeds for Mobility-as-a-Service (MaaS)

Case study: Pittsburgh announces the creation of a MaaS system

Shared mobility has high potential in markets with an undeveloped transport sector

Case study: Milan teams up with Vianova to develop shared mobility vision

Micro-mobility infrastructure development can alleviate pressure in highly motorised cities

Case study: Paris seeks to toughen car traffic rules in 2022

Spending patterns

Flexible work arrangements could help reduce transport costs in expensive cities

Most consumers spend up to USD20 per week on public transport

Urbanites in emerging and developing markets more likely to buy a new car

Most urban inhabitants report transport spending to remain unchanged over the next year

Emerging market cities in Asia to dominate transport expenditure growth

Vehicle ownership

Cities with high automobile ownership face sustainable mobility challenges

Smaller Indian and Chinese cities more than double passenger car numbers in five years

Asian cities are leading markets for motorcycles and mopeds

Electric and hybrid vehicles are a growing but small proportion of automobiles

Incentives and better infrastructure should be used to promote zero/low emissions transport

Key business takeaways

Urban mobility opportunities and challenges

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